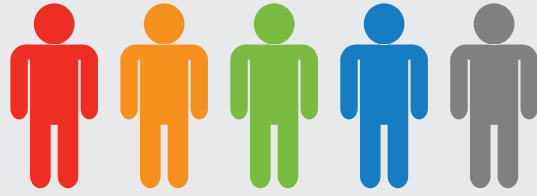


CHANGING MEDIA SUMMIT 2013

21 & 22 MARCH LONDON

**OPTIMISING MEDIA
IN A CHANGING WORLD**
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BRITAIN'S CHANGING MEDIA HABITS



**CHANGING MEDIA
SUMMIT 2013**

Overview

This report examines the research YouGov has conducted looking into current media consumption patterns, profiles of audiences on different platforms and media types, and the effectiveness of advertising across platforms, using the Lynx Space Academy campaign as our case study.

We use the power of connected data to better learn how users interact across different platforms, and what this means for media owners and advertisers. The report is divided into two parts:

1. *Examining general media consumption across different media platforms and demographic profiles.* We seek to better understand cross-media platform usage and whether those using particular brands on traditional media are also using those brands on digital platforms. We also look to understand future trends and how media consumption may change over time.
2. *Exploring a specific advertising campaign and looking at how exposure to advertising on each platform impacts brand perceptions and behaviours.* This section will also examine the optimum combination of media to create desired outcomes. We will look to understand the impact the campaign had on social media, by measuring the reach that the campaign had on Facebook and Twitter and the longevity of the impact it had on consumers.

Executive Summary

Media Consumption Patterns

Traditional content providers must ensure consumers remain loyal when accessing content online

- Consuming content digitally is the big development in media consumption
- However this has, as yet, not gone as far as one might assume and traditional consumption (print newspapers, linear TV etc.) still remains dominant
- Both young and early adopters have moved much faster from traditional to digital and we would therefore conclude that this transformation is likely to accelerate
- Traditional content providers need to work to ensure that as users transfer to digital, they continue to access their content rather than that of new media only organisations – some media owners are better positioned than others to manage this
- Those media companies that have erected paywalls have suffered in terms of transferring users from off to online
- However, there is evidence that early adopters are increasingly willing to pay to access digital content and services so it may be that a 'pay for content' model could be successful as consumers become increasingly happy with that principle

Measuring Advertising Effectiveness Through Connected Data

- **We've discovered the advertising version of the Higgs Boson – the marketer's 'God Particle'. We're calling it the YGX: a trace showing the effect of advertising that has not been consciously recalled, providing a structured measure that can improve the value of media space.**
- The Lynx Space Academy campaign (our case study in this report) was particularly effective in improving brand perceptions and importantly purchase behaviour through their TV adverts
- We saw a significant uplift in brand perception of Lynx among those exposed to the ad but did not recall seeing it
- Connected panel-derived data is crucial to understand the effectiveness of a campaign: you need to be able to monitor perception and behaviour amongst those we know have been exposed to the campaign
- The campaign generated interest on social media and resulted in increased levels of Buzz on BrandIndex, particularly among young males
- While not all social media exposure was positive, being exposed to brand messages on social media did not impact on brand perceptions or purchase consideration or behaviour
- There is a challenge to ensure that branded social media campaigns stay on message and as usage of social media grows, this challenge will become greater



Lynx TV adverts were effective in improving brand perceptions and importantly purchase behaviour

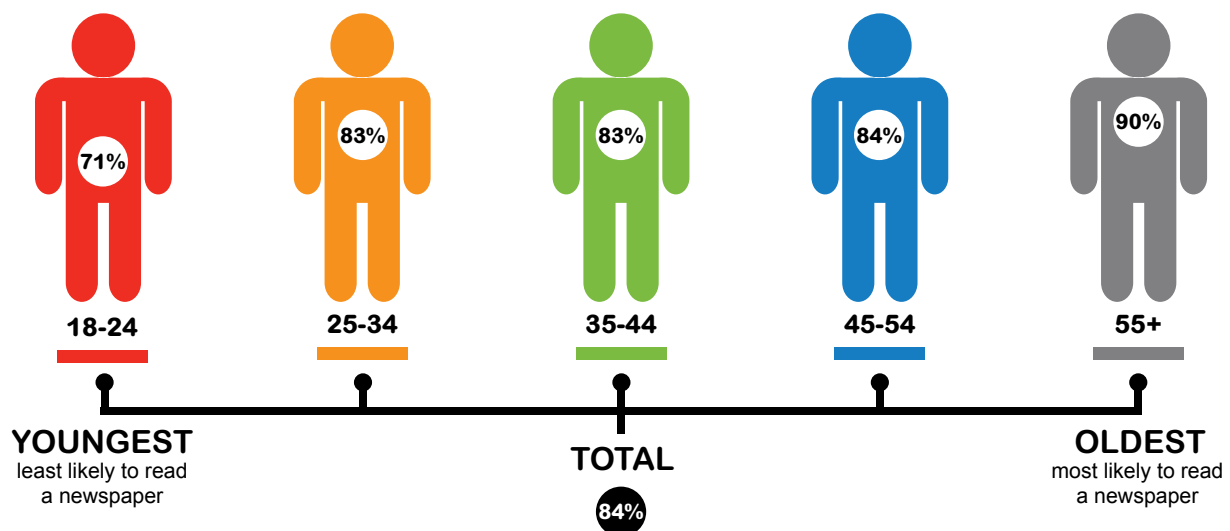
Part I: Current Media Consumption Patterns

Printed newspaper consumption

The challenges for the newspaper industry in a digital world are well documented: declining newspaper sales and the proliferation of freely available news on the internet.

This section of the report will examine the current state of the newspaper market, some of the threats and challenges it faces and some potential ways that these can be addressed. With 84% of the UK population having read a printed daily newspaper in the past year, perhaps it may not all be doom and gloom. If we look at how this varies by demographics there are some fundamental differences, specifically regional and age-based, which could be cause for more concern than the headline figure. Newspaper readership is highest in London, where 93% of the population have read a printed newspaper in the past year, it is lowest in the Midlands where only 79% have read a newspaper in the last year. Regional newspapers are currently finding it harder than most to make ends meet, and our research shows that the appetite for regional newspapers is strongest in Wales and Northern Ireland, where more than one in three say they have read any regional paper in the past 12 months, compared to less than one in five for the nation as a whole.

FIGURE 1 |
Those saying they have read a newspaper in the last 12 months.
Base: All UK respondents (2,051)



One of the best ways to understand longer term trends is to look at demographics and how the younger age groups are behaving as they provide a good early indication of new behaviours. Figure 1 (above) indicates one of the key challenges facing the printed newspaper industry: newspaper readership is correlated with age. The youngest are least likely to read a newspaper and the oldest groups are more likely to read a newspaper so the trend is structured to accelerate.

Engaging different audiences

So what newspapers are being read and which are engaging most with that important 18-24 year olds audience?

The most widely read newspapers amongst all respondents are The Sun / The Scottish Sun, with more than one in four (26%) saying they have read it in the last 12 months, closely followed by Metro and Daily Mail / Scottish Daily Mail (both 23%).

Figure 2 shows the printed newspapers where there is the biggest difference in readership between the oldest and youngest age groups we have identified. Metro, Evening Standard and the Guardian have a higher incidence of readership amongst 18-24 year olds. This represents one of the main challenges for the printed newspaper industry, as two out of the three newspapers identified are free titles, relying on advertising revenue to generate profits, with the Guardian being the only paid-for title with readership highest amongst 18-24 year olds compared to the total.

If you look at the difference between the printed newspapers read in the last 12 months amongst 18-24 year olds and compare that against those aged 55+ year olds, then Metro, Evening Standard and the Guardian have a higher a higher incidence of readership amongst the 18-24 year olds. This represents one of the main challenges for the printed newspaper industry, as two out of the three newspapers identified are free titles, relying on advertising revenue to generate profits, with the Guardian the best placed paid-for title with readership higher amongst 18-24 year olds compared to 55+ year olds.

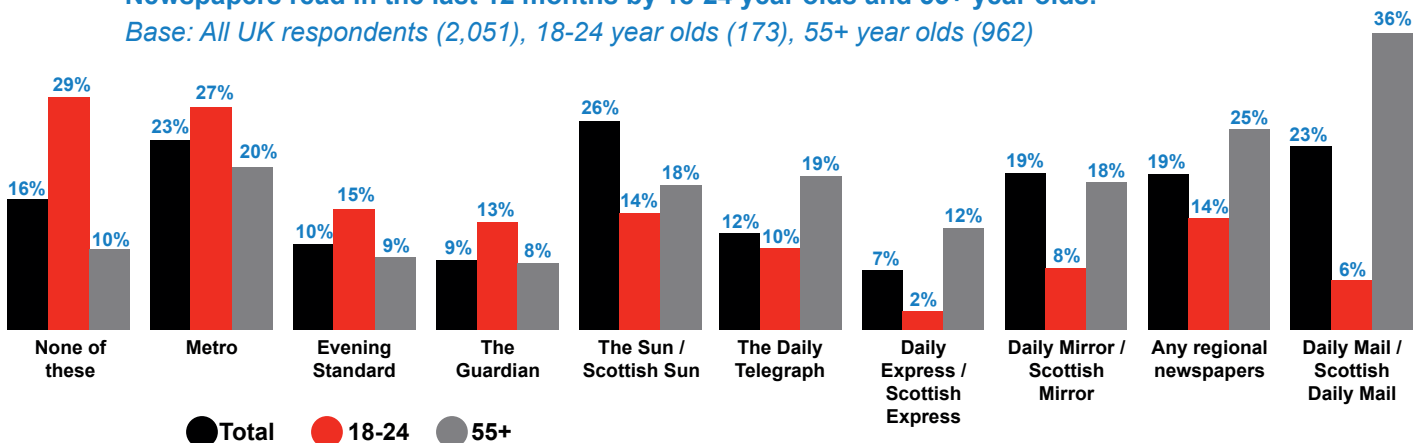
On the other end of the spectrum, the printed newspapers with a much higher incidence of readership amongst the older demographics compared to the younger demographics are the Daily Mail, regional newspapers, the Daily Mirror, the Daily Telegraph and the Daily Express. These newspapers could potentially be most vulnerable to the digital revolution, although as we will see later the Daily Mail in particular appears to have understood that and embraced the digital revolution.

The youngest are least likely to read a newspaper and the oldest groups are more likely to read a newspaper so the trend is structured to accelerate

FIGURE 2 |

Newspapers read in the last 12 months by 18-24 year olds and 55+ year olds.

Base: All UK respondents (2,051), 18-24 year olds (173), 55+ year olds (962)



Digital news and its implications for media companies

Given the decline in print newspaper readership it will be crucial for newspapers to capitalise on digital media as a potential saviour.

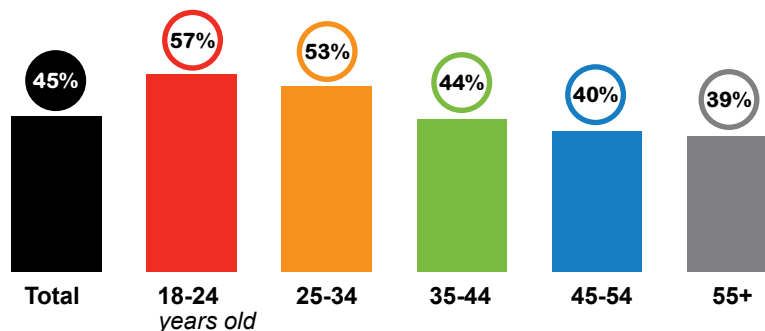
Competition for clicks is fiercer on the web than on paper with organisations such as the BBC and other broadcasters providing detailed news coverage, as well as new businesses such as Huffington Post emerging alongside popular independent blogs like Guido Fawkes and Slugger O'Toole. Our research shows that 45% of the UK population from our online survey have read a newspaper online in the past year, compared to 70% of the UK population who have accessed an online news site in the last month, with BBC News gaining the largest share at 43%. Regionally there is a similar pattern with those living in London (54%) most likely to have read a newspaper online in the past 12 months, whereas those living in the Midlands (39%) are least likely.

For online readership we see the inverse relationship with age that we do for readership of printed newspapers, with those aged 18-24 years old most likely to have read a newspaper online and those aged 55+ least likely to have read a newspaper online in the last 12 months, with 61% saying they have done so in the last 12 months.

FIGURE 3 |

Those saying they have read a newspaper online in the last 12 months.

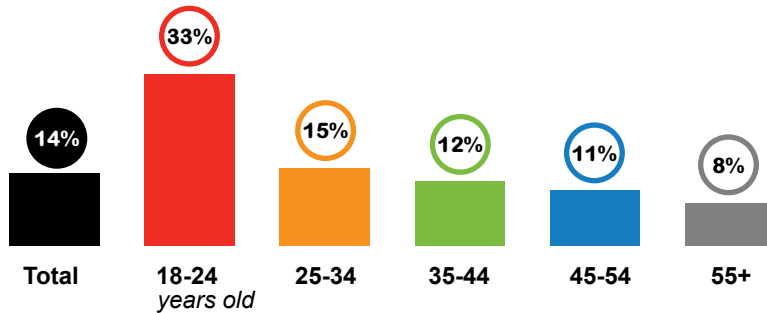
Base: All UK respondents (2,051)



The newspapers which have the highest online readership of the last 12 months according to our online survey are the Daily Mail (16%) and the Guardian (14%). The online readership of the Daily Mail is relatively flat when looking at the different age groups, with no clear pattern emerging, but when looking at the demographics for online readership of the Guardian, there is a clear correlation with age, as shown right in Figure 4.

FIGURE 4 |

Those saying they have read the Guardian newspaper in the last 12 months. *Base: All UK respondents (2,051)*

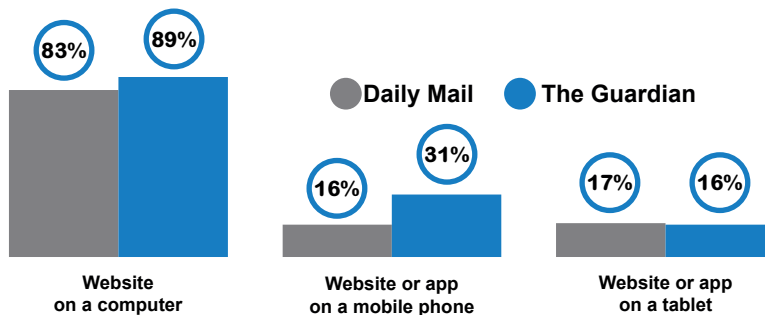


With one in three 18-24 year olds having read the Guardian newspaper online in the past 12 months (the highest for any of the daily newspapers) the Guardian is well placed to further engage with this important audience. To substantiate this further, First Adopters are also most likely to read the Guardian newspaper online.

One of the reasons why the Guardian is well positioned amongst this audience is because of the way that digital content is being accessed across multiple devices as shown below in Figure 5.

FIGURE 5 |

Devices ever used to access newspapers online. *Base: Those reading Daily Mail online in the last 12 months (135), Those reading the Guardian online in the last 12 months (137)*



On average, those accessing the Guardian online use 1.4 devices to do so, whereas those accessing the Mail online use 1.2 devices to do so, so those accessing the Guardian are doing so on more devices relative to the Daily Mail.

Fostering a loyal print and online readership

Daily Mail readers visit the equivalent online site (MailOnline) the most, with almost two in five doing so in the last 12 months. Over a quarter (28%) of Sun readers have also visited The Sun online in the last 12 months. Daily Express readers use the Mail online significantly more than they visit the Express online, whilst Daily Star readers are more likely to visit The Sun online than either the Star's equivalent site or the Mail online. The Daily Express and Daily Star clearly have more work to do if they are to survive in the digital era.

With the printed press in decline, many newspapers have struggled to understand how best to monetise the online stream of their offering. The Times and the Financial Times have opted to restrict access to their website and introduce a paywall. While these players will argue the value of the audience opting to pay is greater than the lost audience who is unwilling to pay, the impact on the overall traffic visiting the site is likely to impact on readers' loyalty towards the brand.

Some evidence of this can be seen in Figure 7 (below right). Amongst those who have read a printed copy of the Financial Times in the last 12 months, around one in four (24%) have read the newspaper online, however more than one in three (36%) have read the Guardian online in the last 12 months, and just under one in three (31%) have read the Telegraph online in the last 12 months.

FIGURE 6 |
Amongst readers of each newspaper, what proportions have accessed online websites in the last 12 months? Base: readers of these daily newspapers

		Reading print newspapers				
		Daily Express / Scottish Express	Daily Mail / Scottish Daily Mail	Daily Mirror / The Scottish Mirror	Daily Star / The Daily Scottish Star	The Sun / The Scottish Sun
Reading newspapers online	Daily Express / Scottish Express	14%	4%	2%	4%	2%
	Daily Mail / Scottish Daily Mail	24%	38%	13%	14%	15%
	Daily Mirror / The Scottish Daily Mirror	3%	6%	19%	14%	6%
	Daily Star / The Daily Star of Scotland	0%	1%	2%	5%	1%
	The Sun / The Scottish Sun	9%	10%	13%	26%	28%

Rather than opting to pay to access the Financial Times online, they are instead opting to read the Guardian and the Telegraph for free. The same can be said for the other newspaper which has introduced a paywall, The Times. 16% of those reading the print version of The Times in the last 12 months have also read the newspaper online, with readers instead opting for the Guardian (30%), Daily Telegraph (20%) and the Independent (18%) instead.

Rather than paying to access the FT online, readers are opting to read the Guardian and Telegraph for free

Creating an offer for readers, regardless of the platform that they are accessing it on, is important in order to build brand engagement and loyalty, and Figure 7 shows the newspaper brands which are currently doing this most effectively. 65% of those reading the Guardian in the last 12 months have also read it online, making it the newspaper that manages to engage the largest proportion of their print readership online. Meanwhile, for the Daily Telegraph it is 41% and the Independent 40%.

FIGURE 7 |
Amongst readers of each newspaper, what proportions have accessed online websites in the last 12 months? *Base: readers of these daily newspapers*

		Reading print newspapers					
		The Daily Telegraph	Financial Times	The Times	The Guardian	The Independent	-
Reading newspapers online	The Daily Telegraph	41%	31%	20%	21%	23%	21%
	Financial Times	8%	24%	5%	7%	12%	3%
	The Times	9%	12%	16%	11%	16%	8%
	The Guardian	27%	36%	30%	65%	48%	31%
	The Independent	18%	21%	18%	30%	40%	20%
	i	3%	6%	4%	7%	7%	6%

TV habits: the new multi-device landscape

Young people are moving towards watching TV via a PC/laptop

It is no secret that TV viewing habits are changing. With the growing affordability of devices, other than the traditional TV set, through which we can watch TV (be it live, downloaded, catch-up or on-demand), and quicker internet speeds available both inside and outside the home, it is no surprise that our habits are changing.

The shift from watching TV on a traditional TV set, to watching it on multiple devices is directly correlated with age. As shown in Figure 8, the proportion of 18-24 year olds who watch TV via a TV set daily is significantly lower than those aged 35+. In direct contrast, almost a quarter of 18-24 year olds use their PC/laptop to watch TV daily, which is significantly higher than those aged 25+. With these younger TV viewers already watching TV through new devices, the TV viewing landscape is evolving. We also see a similar proportion of First Adopters (23%) watching TV daily on a PC/laptop to provide further evidence of this platform being used to watch TV.

FIGURE 8 | Devices used to watch TV *daily* (this could be live, catch-up/ on-demand, downloading or streaming) Base: All UK respondents who own/use each device: TV set (1647) PC/laptop (1940)

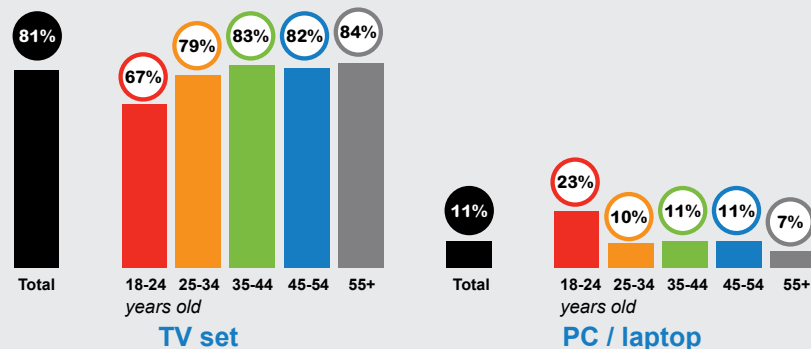
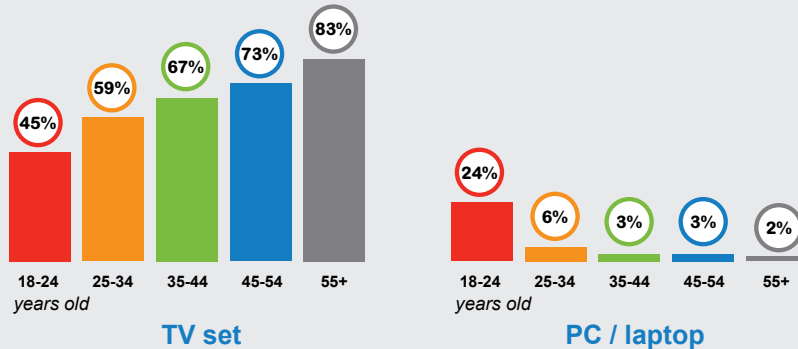


Figure 8 shows all types of viewership ie. both linear and on-demand so we might assume that PC/laptops are used primarily for the on-demand element of viewership. However, if we look at Figure 9 we can see that this is not actually true; 18-24yr olds in particular are using their PC/laptop to watch live TV as well. In fact a quarter say they watch the majority of live TV through a PC/laptop. This is still lower than the 45% that watch via a TV set the most often, but demonstrates the growing trend to watch TV via multiple internet based devices.

FIGURE 9 |

Devices on which live TV is mostly watched

Base: All UK respondents who ever watch TV through these devices



One in ten (9%) of 25-44 year olds claim they watch the majority of live TV through Smart/connected TVs – which is significantly higher than amongst the older and younger age groups, while 12% of First Adopters say they watch the majority of live TV through Smart/connected TV. Smartphones and tablets (via apps and websites) are not being used for the majority of live TV viewing. This is not to say that this will not increase over time, but the larger screened and less mobile devices are gaining the majority share of live TV viewing.

Older people spend the most time watching live TV on a traditional TV set

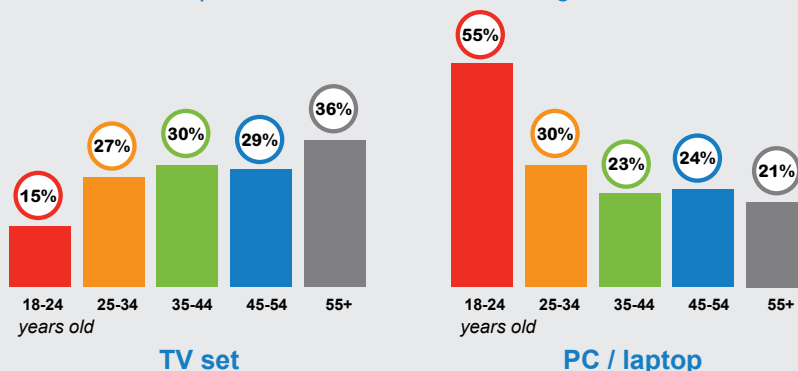
TV on-demand

Four out of five (79%) people in the UK watch TV On-demand. This is highest amongst those aged 18-34 at 87%. 79% of 35-54 year olds watch TV on-demand and 70% of those aged 55+ claim to do the same (66%). Once again, when we look at the devices used the most to watch TV on-demand the age-correlated results reveal some significant differences in habits. (See Figure 10)

FIGURE 10 |

Devices used to spend the most time watching TV on-demand

Base: All UK respondents ever watch TV through these devices



Over half 18-24 year olds who watch TV through their PC/laptop primarily use this to watch TV on-demand, which is significantly higher than amongst all other age groups. Those aged 35 and over use their TV set to watch on-demand more than their PC/laptop.

FIGURE 11 |
Frequency of watching TV programmes via online TV services
Base: All UK respondents (2,051)

% Watch TV programmes weekly	Total	18-24	25-34	35-44	45-54	55+
BBC iPlayer	30%	54%	33%	23%	30%	22%
YouTube	23%	48%	34%	25%	17%	10%
ITV Player	17%	23%	20%	13%	21%	13%
4oD	13%	32%	21%	11%	10%	5%
Demand 5	9%	18%	15%	7%	8%	4%

YouTube already perceived to be a TV channel amongst 18-24 year olds

In terms of the channels watched on-demand, unsurprisingly BBC iPlayer is the most watched overall on a weekly basis. What is perhaps more surprising is that YouTube is the second most used on a weekly basis to watch TV programmes. Again, this is directly correlated with age, with almost half of all 18-24 year olds using YouTube to watch TV programmes on a weekly basis. YouTube is used more than either 4oD or Demand 5, on a weekly basis, by respondents of all ages.

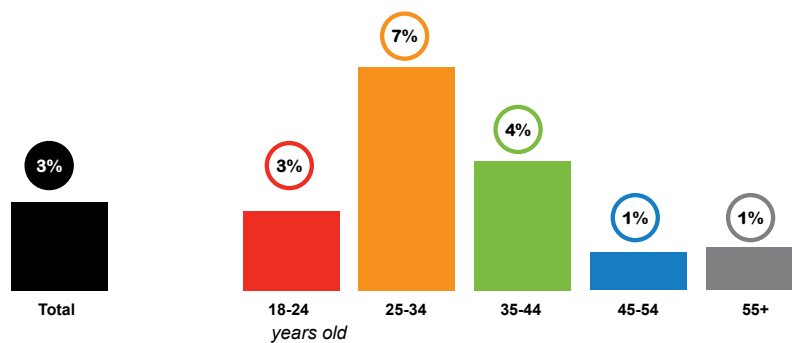
Given the recent announcement that YouTube will launch as a channel via FreeSat, our research suggests that this is a wise move and YouTube is currently well placed to capitalise on this opportunity. YouTube is used more than either 4oD or Demand 5, on a weekly basis, by respondents of all ages. 48% of First Adopters also say that they watch TV programmes on YouTube on a weekly basis, providing further evidence of YouTube's strong position.

Monetising news content

So far we have seen that 18-24 year olds and the First Adopters cohort are embracing the digital revolution most with regards to accessing news content from newspapers, but monetising digital content remains the biggest challenge, especially in light of the fact that those newspapers that have introduced a paywall are seeing their readers visit the websites of competitor titles.

We asked respondents which digital goods they currently pay for, and despite their high levels of usage 18-24 year olds are no more likely to pay for news subscriptions than the general population, with 25-34 year olds most likely to pay for news subscriptions, as shown below in Figure 12.

FIGURE 12 |
Those saying they currently pay for digital news subscriptions
Base: All UK respondents (2,051)

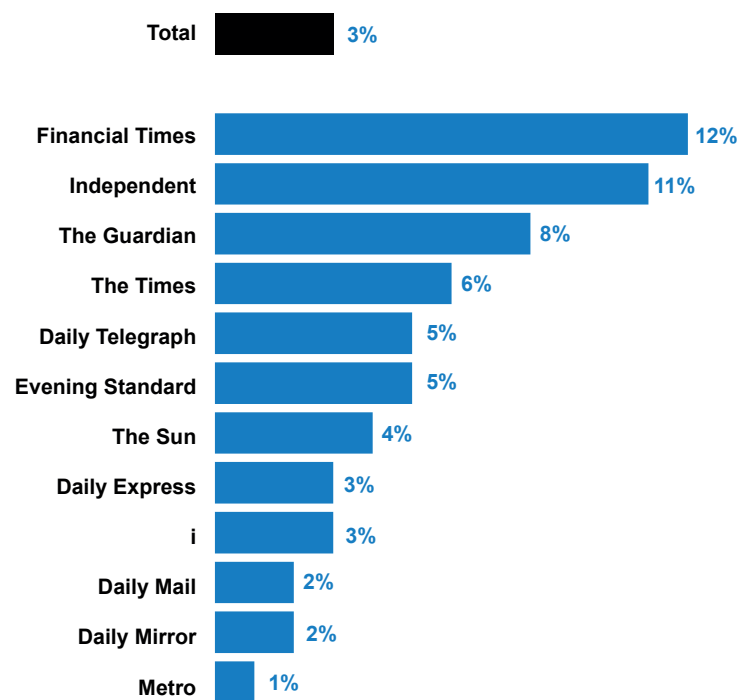


However, the picture is more promising when we look at First Adopters, where just under one in ten (9%) say they currently pay for digital news subscriptions. Therefore understanding this group in more detail and what motivates them when accessing news and paying for news will be one of the keys to unlocking how to maximise revenue for digital news.

Understanding what motivates subscribers is key to unlocking revenue in digital news

We can also look at which readers of printed newspapers are currently paying for digital news subscriptions, as shown below in Figure 13.

FIGURE 13 |
Those saying they currently pay for digital news subscriptions
Base: All UK respondents (2,051)

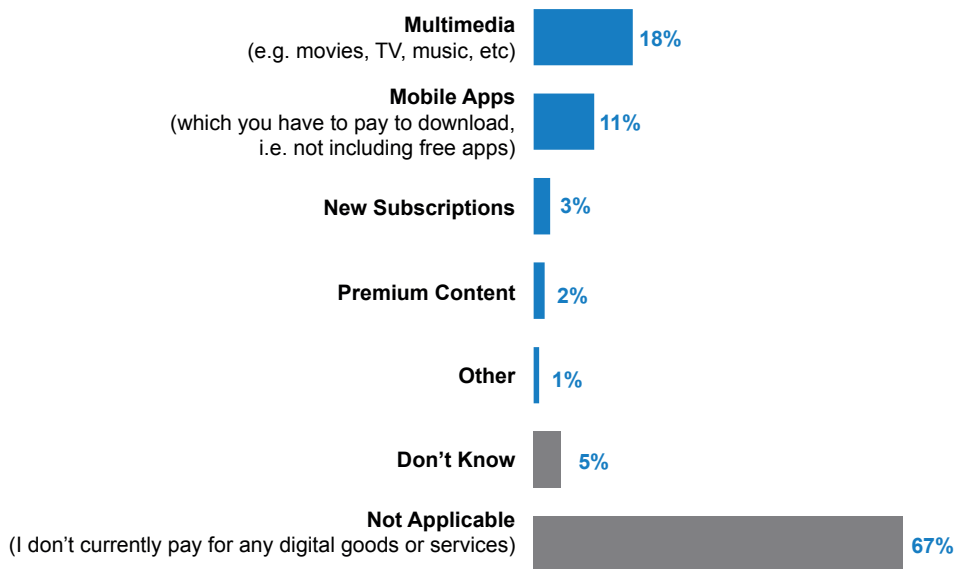


Readers of the Financial Times (12%) and Independent (11%) have the highest proportion of readers currently paying for digital news subscriptions, followed by the Guardian (8%) and The Times (6%).

If we look at how paying for news subscriptions compares to other forms of digital content, multi-media (18%) is what consumers are currently paying for the most, followed by mobile apps (11%), while 67% say that they currently don't pay for any digital goods or services. Mobile apps are therefore a key area for news providers to explore further in order to monetise their content. Consumers under the age of 44 years old are significantly more likely to currently pay for mobile apps compared to those aged over 45 years old, while amongst First Adopters, one in three (33%) are currently paying for mobile apps.

67%
of people do not pay for any digital goods and services

FIGURE 14 |
What digital goods and services consumers are currently paying for
Base: All UK respondents (2,051)



Part II: Lynxed-Up Data and How It Helps Advertisers

Part II of this report gets into the core of the case study - using connected data to track brand perception based on real exposure to advertising campaigns.

We examine the Lynx Space Academy campaign and look at a number of instances, including people who watched TV shows where the ads ran, and follow Twitter accounts that talked about the campaign, to see how the different interactions change attitudes and behaviours.

We can answer the old plea of 'Half the money I spend on advertising is wasted; the trouble is I don't know which half' (John Wanamaker) by moving away from asking people what advertising they claimed to see and focussing in on the pieces we know they were exposed to.

Connected panel-derived data now enables us for the first time, to answer the old plea of 'Half the money I spend on advertising is wasted; the trouble is I don't know which half'

Just as the media is changing, so is market research. In this new world, networked panel data sits at the confluence of big data and traditional structured survey data.

This means that we can now draw upon an enormous dataset to better understand the effectiveness of advertising. For example, as well as knowing someone's age and gender we can now also assess them based on what TV shows they watch and whether they are on social media. The data can be plugged into a variety of tools to be accessed and analysed. (A full description of the tools and methodology we use is in the appendix.)

To demonstrate the power of this connected networked data, we have looked at the Lynx Space Academy campaign as a case study. In January the deodorant brand launched a competition to send 20 people into space as part of the campaign for its Apollo product line. To publicise the competition the campaign undertook activity across TV, online and outdoor media.

Who we studied

To understand the effectiveness of the campaign, YouGov created an online study and sent the survey to three distinct groups:



UK nationally representative sample:

1,053 completes



People we know have been exposed to the TV adverts:

1,376 completes



People we know have been exposed to Lynx through social media:

603 completes

(See the appendix for a full explanation of how we constructed these samples.)

The respondent samples were based on the media plan using information collected from Ebiquity and were identified by using the networked data mentioned above (e.g. we know what TV shows people have watched, what messages they are exposed to on Twitter). The online questionnaire sent to each group was identical, so we could look at differences across the different samples.

What we did

This report aims to understand what impact the Lynx Space Academy campaign had on consumers by answering the following four questions:

1. Do consumers remember seeing the advert? (*campaign awareness*)
2. Has the campaign made more people aware of the brand? (*brand awareness*)
3. Has the campaign been successful in changing perceptions about the brand? (*brand perception*)
4. Has the campaign made people more likely to purchase the product? (*purchase propensity*)

YouGov collects daily TV viewing, newspaper readership and radio listening habits from fresh samples of 2,000 nationally representative respondents. We use this data to both better understand how brand perceptions differ depending on what the media consumers are exposed to, and also to understand the effectiveness of advertising.

Collecting information about actual media consumption on a daily basis allows us to connect this data to our custom survey data and our brand tracking tools. Doing this means we can provide research data which is both stronger and more powerful than merely asking respondents whether they have seen a certain advertising campaign. It also means that we are not reliant on advertising recall when we are trying to understand the effectiveness of advertising.

Let's now look at what we found from connected data about the Lynx Space Academy campaign.

We've discovered the marketer's 'God particle' – a trace showing the effect of advertising that has not been consciously recalled

The Lynx Space Academy Campaign

Do consumers remember seeing the advert?

Interestingly, when we asked respondents whether they recall seeing the Lynx advertising campaign there was little difference between the three samples. This was despite the fact that those exposed to the television campaign watched programmes that contained the adverts and are therefore much more likely than the nationally representative sample to have seen the adverts. The social media sample was exposed to messages about Lynx, although these might not have been from the official campaign and could instead have been fellow Twitter or Facebook users mentioning the brand.

FIGURE 15 |
Which, if any, of the following health & beauty brands have you seen or heard an advertisement for in the PAST TWO WEEKS?

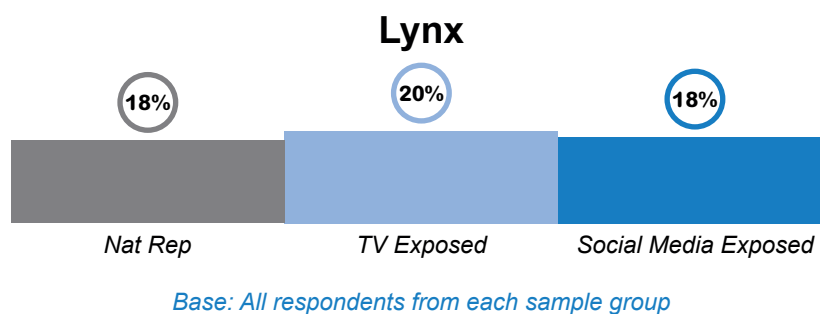


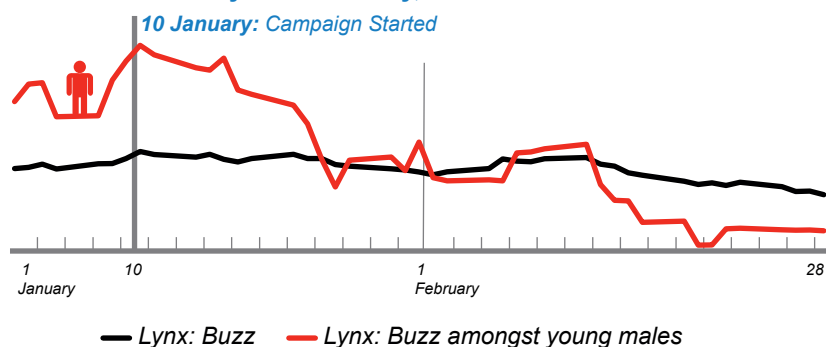
Figure 15 indicates the possibility that the campaign operated on a subconscious level: even though we know that people are very likely to have seen the advert they didn't recall seeing it. We will explore this further later in the report.

How has the campaign impacted on awareness of the brand?

Using YouGov's BrandIndex tool we can look at Lynx's Buzz score – a measure of whether someone has heard anything positive or negative about the brand in the past two weeks. In Figure 16 we see that the Lynx score peaks on January 10, the day the campaign started. Among young males – the target audience for the campaign – the score at the campaign's launch was even higher. While Buzz among 18-24 year old men then declined, the overall Buzz score remained fairly consistent and only tapered off towards the end of February.



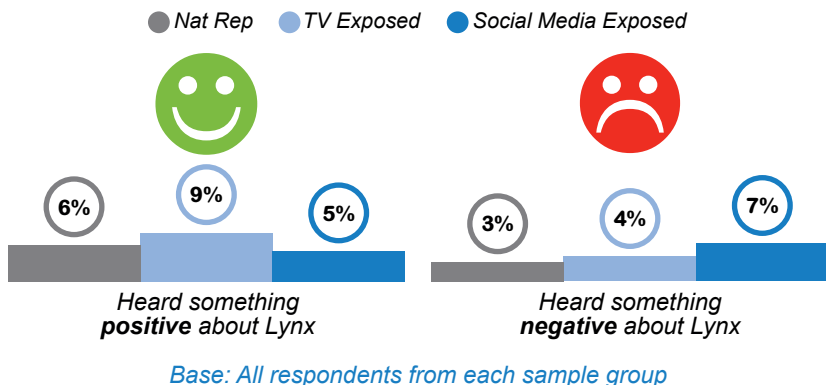
FIGURE 16 |
Buzz scores for Lynx in January, source: BrandIndex



Those who saw the TV ad were most likely to have heard something good about Lynx, while those exposed to Lynx on social media were more likely to have heard something bad

We see in Figure 17, among the three different samples, an interesting pattern emerges. Those exposed to the TV advert are most likely to have heard something positive about Lynx. People exposed to a Lynx message on social media are most likely to have heard something negative about the brand.

FIGURE 17 |



Base: All respondents from each sample group



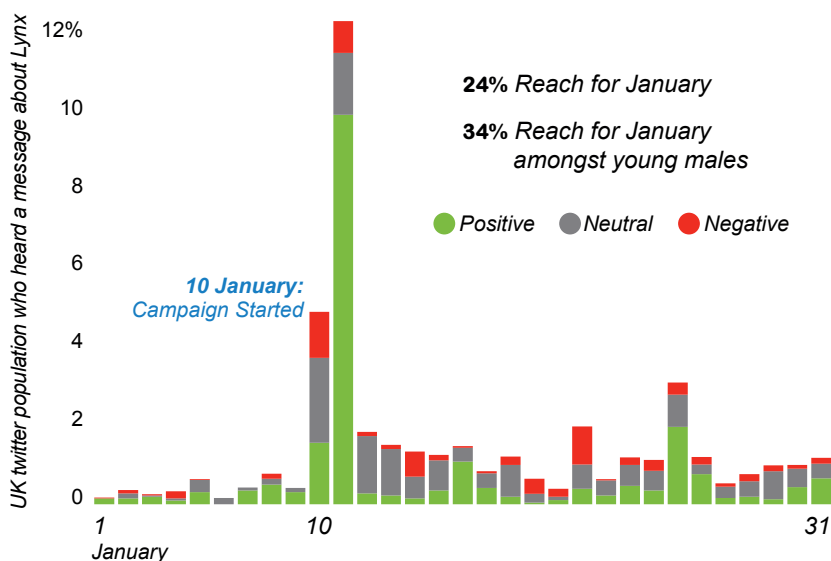
Love the new Lynx advert. Nothing beats spacemen. Ever.

Posted on 11th January 2013 at 9:48pm

Social media can be a great way to engage consumers, but the user generated content may not always turn out as planned

By using SoMA, our social media analysis tool, (the first robust social media audience measurement tool which provides full demographics) we can dig into this further. Figure 18 shows data for the month of January which indicates 24% of the UK Twitter population heard a message about Lynx, a figure that rises to 34% among young males. Even though there was very little activity before the launch, the activity had an immediate impact online, and January 10 and 11 show the greatest reach during the month. Many of the mentions on Twitter were from people entering the competition and asking their friends to vote for them.

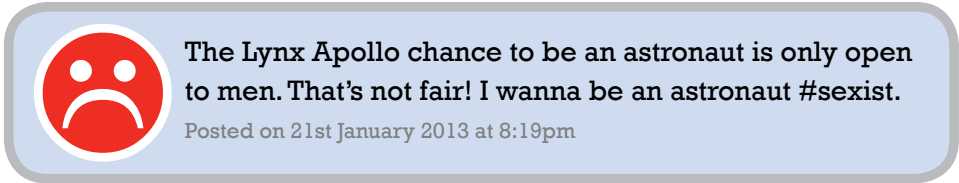
FIGURE 18 |



The recent Old Spice campaign shows that social media can be a great way to engage consumers and tap into word-of-mouth marketing. A TV advert featuring a shirtless, muscular and very confident male model ('Old Spice guy') was coordinated with an aggressive social media campaign in which the model responded directly to both positive and negative messages from consumers on social media, thus greatly increasing the campaign's reach and the brand's social media following. However, social media and user generated content in general carries the risk that the activity being generated might not always pan out as planned. This happened with the Lynx Space Academy campaign with a small backlash among women.

Lynx has always unashamedly targeted men and many of the brand's previous advertising campaigns played on the benefits of men using Lynx to attract women. In this context, the "Leave a man, come back a hero" slogan for the Space Academy campaign, seems like a good one that is tailored to their audience. However, the chance to go into space is equally appealing to women, and a number of women entered the competition and garnered a large number of votes from their peers. However, it transpired that in some countries the competition's terms and conditions indicated that only men could enter.

The results among those exposed to a brand on social media may not always be positive. As well as allowing us to better understand the reach and volume of Tweets about a brand, SoMA also helps us measure their sentiment. As news of the terms and conditions restrictions in some countries spread online, SoMA picked up some of the chatter with one panel member commenting:

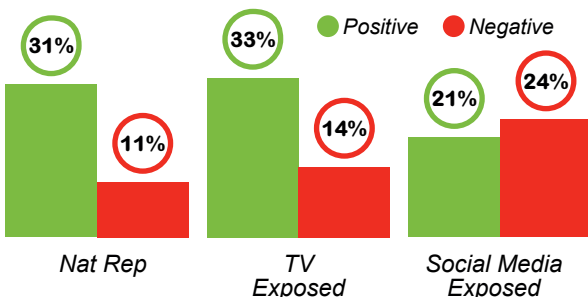


Lynx quickly amended the terms and conditions and reiterated that the competition was open to both men and women.

Has the campaign changed perceptions about the brand?

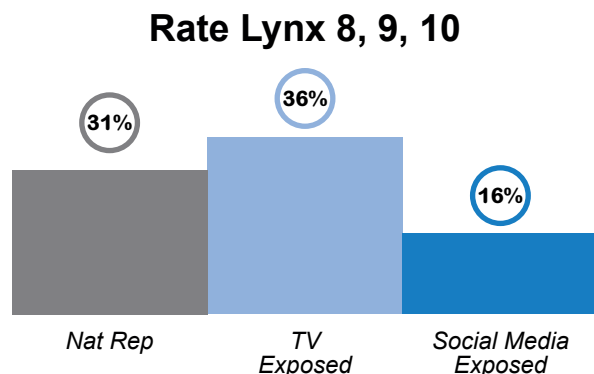
Looking at perceptions of Lynx among the three samples, (Figure 19) some interesting points emerge. A third (33%) of those exposed to the TV commercial had a positive impression of the brand. While this was the highest of the three sample groups, it was only marginally higher than the national average. This group also contained a higher proportion of people who have a negative impression of Lynx than the national average. The sample exposed to Lynx on social media was the only group with more negative than positive impressions of the brand. This underlines the earlier point that these people may have been exposed to negative messages about Lynx via social media.

FIGURE 19 |
Have an overall positive/negative impression of Lynx



Base: All respondents from each sample group

FIGURE 20 |
On a scale of 0 to 10, how would you describe your overall impression of Lynx



Base: All respondents from each sample group

Part of the study asked respondents to rate their overall impression of Lynx on a scale from 0 to 10, with the highest mark being most positive. The results above (Figure 20) from those rating the brand as 8, 9 or 10 show that people exposed on TV have the best impression, followed by the nationally representative group. Social media trails in a distant third.

Marketeers need more than conscious recall to know whether someone has been influenced by an advert

We used a logistic regression model to take into account the different attributes of the samples in terms of their overall impression of Lynx. For instance, we needed to be cognizant of the ages of respondents given Lynx is targeted towards a younger audience, especially as the average age of those who were exposed to the TV advert was slightly higher than the nationally representative sample. Our regression model considered the respondent's age, gender, social grade and whether or not they had previously purchased a Lynx product.

The model showed that, if someone was in the sample known to have watched TV programmes containing Lynx ads, they were 33% more likely than the nationally representative sample to rate the brand as an 8,9 or 10. This was statistically significant at a 95% confidence level. In other words, those exposed to the TV advert were more likely to rate Lynx highly than those who probably didn't see the advert. This finding shows that the TV advertising campaign was successful in changing perceptions about Lynx.

A second model was run that took into account whether the respondents recalled seeing a Lynx ad and whether they had recently heard anything good or bad about the brand. This showed that those who recalled hearing good things about Lynx recently were much more likely to express a positive impression of the brand than those who had not. Additionally, those who specifically recalled seeing the Lynx ads tended to have a more positive impression. However, this model also showed that those known to have watched TV programmes containing the Lynx ads were 26% more likely to express a positive overall impression, irrespective of whether or not they recalled seeing ads or heard anything positive about the brand.

This shows that conscious recall is not a good enough indicator of whether or not someone has been influenced by an advert. This can only be determined by measuring their actual exposure to an ad, as we have done through our media consumption surveys: the marketing Higgs Boson, or YGX, as described earlier.

Has the campaign changed purchasing behaviour for Lynx?

The ultimate aim of any advertising campaign is to increase sales. The final section of this case study focusses on whether those who have been exposed to the Lynx TV commercial are more likely to purchase the brand.

Looking at the three samples (Figure 21), of those exposed to the TV advert 50% have purchased a Lynx product at some point. This is marginally higher than both the nationally representative sample and those exposed to the brand through social media samples.

Among those who had purchased Lynx in the previous 30 days, there was little difference between the nationally representative sample and those who were exposed to the TV advert. However, those who were exposed to a Lynx message on social media were noticeably less likely to have purchased a Lynx product in the preceding 30 days.

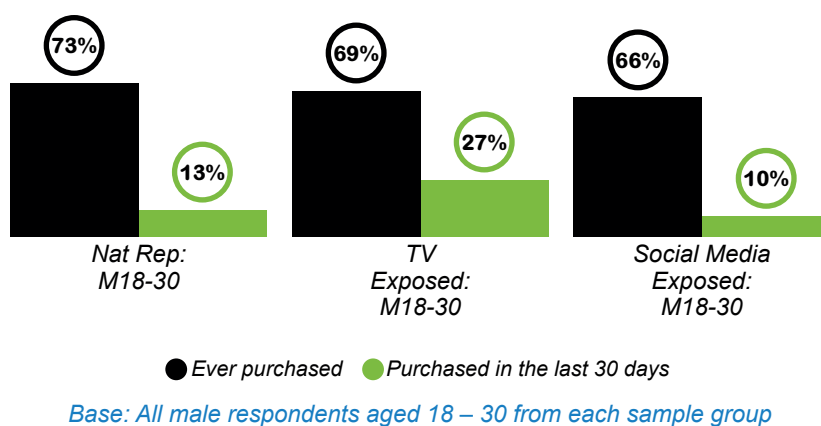
Those who were exposed to a Lynx message on social media were noticeably less likely to have purchased a Lynx product in the preceding 30 days

FIGURE 21 |
Lynx: Previous purchase behaviour by sample group



However, by drilling down to the target market of young males a more interesting story emerges (Figure 22). Among men aged 18-30 exposed to the Lynx TV advert, 27% had purchased a Lynx product in the previous 30 days, significantly higher than those in the nationally representative sample. This seems to indicate that among the brand's target market those exposed to the TV advert were significantly more likely to have purchased a Lynx product in the previous 30 days.

FIGURE 22 |
Lynx: Previous purchase behaviour amongst males aged 18 – 30



Among the brands target market those exposed to the TV advert were significantly more likely to have purchased a Lynx product in the previous 30 days

To test this hypothesis further we created a second logistic regression model to see whether differences in recent purchase behaviour still held true once differences in the sample had been taken into account.

The regression model was run using the same set of independent variables as before:

1. Sample
(i.e. nationally representative, exposed to TV advert or exposed to social media message)
2. Age
3. Gender
4. Social grade
5. Lynx purchase history
(whether or not the respondent had ever purchased a Lynx product before)

The results from the model show that, as expected, men and those who have previously purchased Lynx were much more likely to purchase Lynx. However, they also show that respondents who saw the Lynx TV adverts were also more likely to have purchased Lynx in the previous 30 days, once the other factors had been taken into consideration. The odds ratio in this case was 1.49 – meaning respondents from the ad-exposed sample were on average 49% more likely to have recently purchased Lynx products than those from the standard nationally representative sample.

Connected panel-derived data now lets us describe and follow micro-audiences in real time. YouGov's identification of a marketer's Higgs Boson – we're calling it the YGX – can transform campaigns and allow media owners to reclaim the value of their prime asset from intermediaries.

Appendix

YouGov collects daily TV viewing, newspaper readership and radio listening habits from 2,000 nationally representative respondents. Using this data we are able to understand how brand perceptions differ by the media people are exposed to and also understand the effectiveness of advertising. By collecting data on actual media consumption on a daily basis and connecting this information to our custom survey data and our brand tracking tools, we are able to provide research data that is stronger and more powerful than simply asking respondents whether they have seen a certain advertising campaign.

YouGov has also recently introduced SoMA, a social media monitoring tool with the following unique differentiators:

1. We can access data from Facebook as well as Twitter
2. The data comes from members of the YouGov panel so we have a detailed understanding of their demographic and other profiling information. Because of this we can match the profile of our panel to the profile of the Twitter and Facebook populations
3. SoMA picks up brand mentions from friends and followers of everyone on our panel, as well as the panellists
4. This means that we can measure the 'reach' of an advertising campaign as well as the number of people that have mentioned it

To demonstrate the power of these data sources in further detail we have created a case study of Lynx, which – as part of its Lynx Apollo product range – recently launched a competition to send 20 people into space through the Lynx Space Academy. The campaign used TV, Online and Outdoor media to publicise the competition.

To understand the effectiveness of the campaign, YouGov created an online survey that was sent to the following three samples of respondents based on the media plan using information collected from Ebiquity:

1. UK nationally representative sample: 1,053 completes
2. People we know have been exposed to the TV adverts: 1,376 completes
3. People we know have been exposed to the campaign through social media: 604 completes

The online questionnaire sent to these respondents was identical, and we were therefore able to look at the differences among the samples.

The questionnaire sent to respondents looked to replicate the measures that we collect for BrandIndex, which is our daily brand tracking tool:

- General Impression
- Quality
- Value
- Willingness to recommend
- Buzz
- Attention

These are the measures we compared for analysis. We asked about a range of 25 health and beauty brands, but throughout this report we only focussed the scores for Lynx.



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