

# AUDIO SUPERCHARGES TV CAMPAIGNS

YOU CAN'T UNHEAR THIS

July 17, 2018

# AUDIO HAPPENS HERE



# AUDIO IS GROWING, THANKS TO MORE DEVICES

20% of adults have a smart speaker such as an Amazon Echo or Google Home



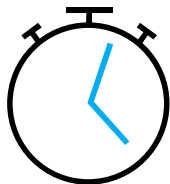
43% of adults use an audio streaming service for music, radio and/or podcasts

Source: Nielsen MediaTech Trender Report, Q1 & Q2 2018

# TIME SPENT WITH MUSIC +37% IN 2 YEARS

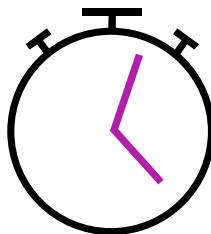
AVERAGE HOURS SPENT PER WEEK LISTENING TO MUSIC

2015



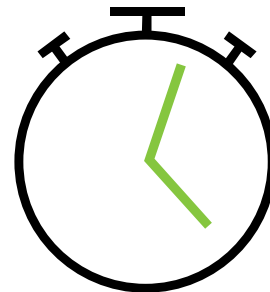
23.5 hours

2016



26.6 hours


2017



32.1  
hours

# FOLLOW THE MONEY

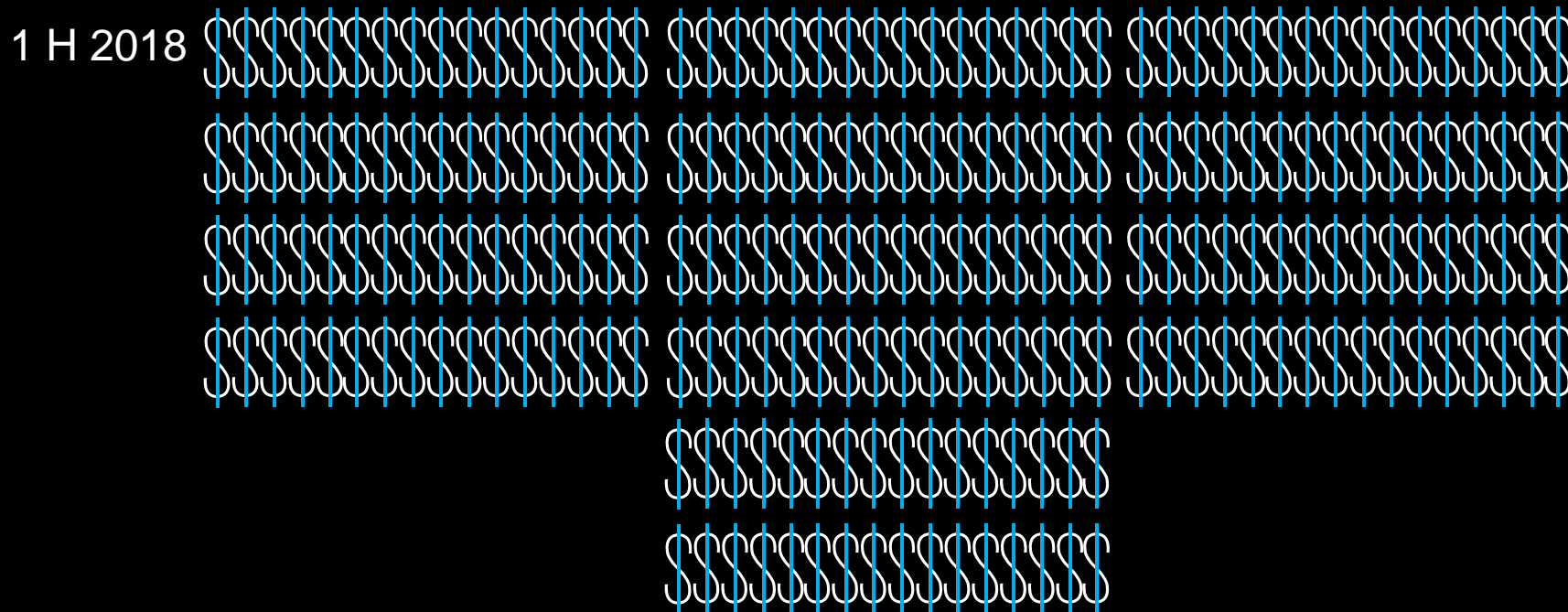
1 H 2017



Source: Ad Intel, total dollars spent on Network and Spot radio by Procter & Gamble in the US

# CPG HAS ALREADY MOVED TO AUDIO

## FOLLOW THE MONEY



Source: Ad Intel, total dollars spent on Network and Spot radio by Procter & Gamble in the US

# THE MEDIA UNIVERSE

P18+ WEEKLY REACH

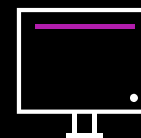
**SOCIAL MEDIA**

THE CONSUMER

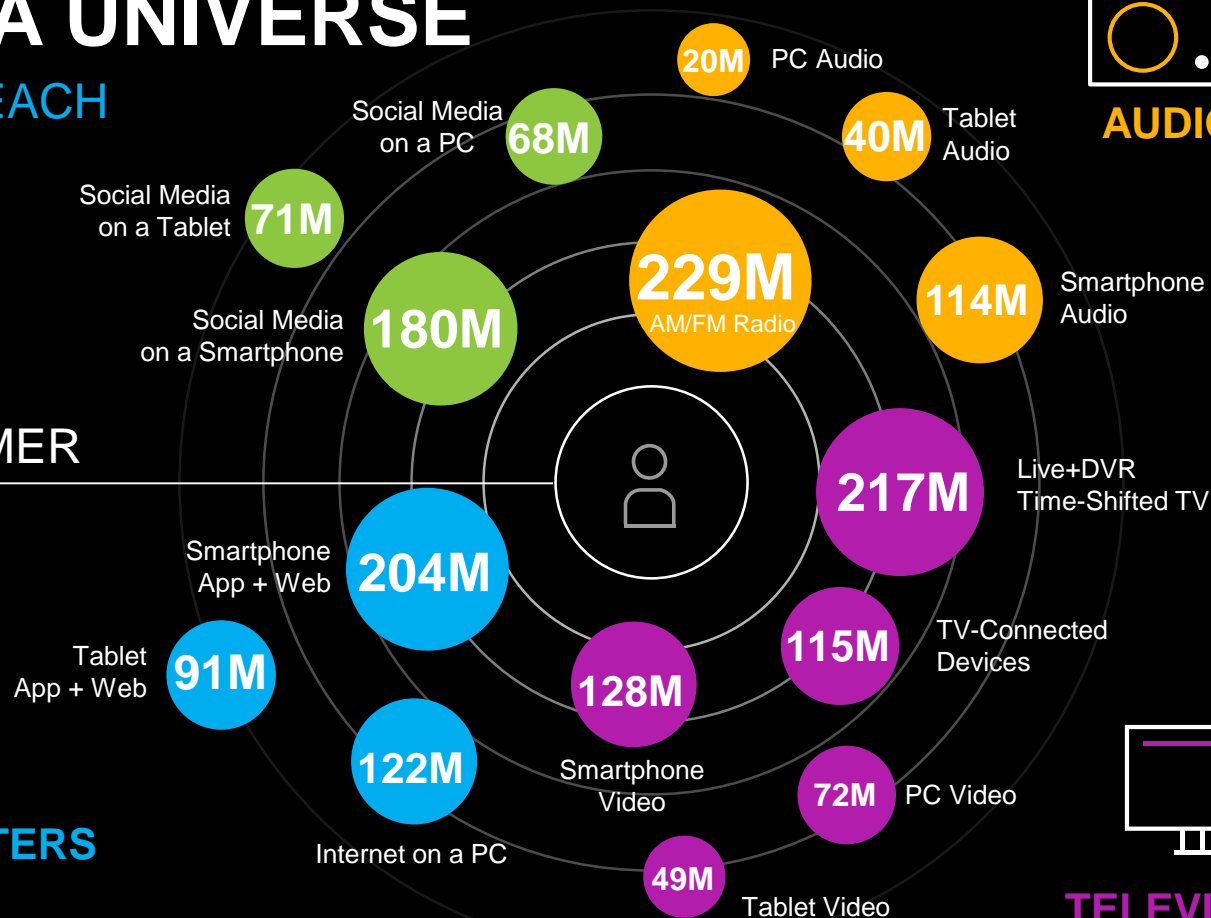
**MOBILE & COMPUTERS**



**AUDIO**



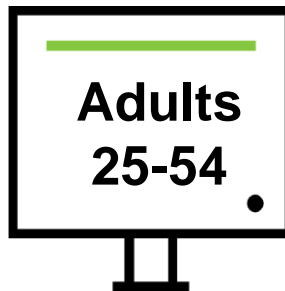
**TELEVISION**



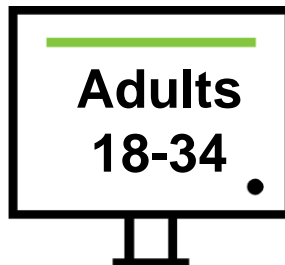
# THE MARKETERS REALITY: TV CAN'T DO IT ALL

The Heaviest TV Campaigns Still Miss Customers

- January 2017
- Top 5 National Automotive Campaign
- 2,870 TV Commercials



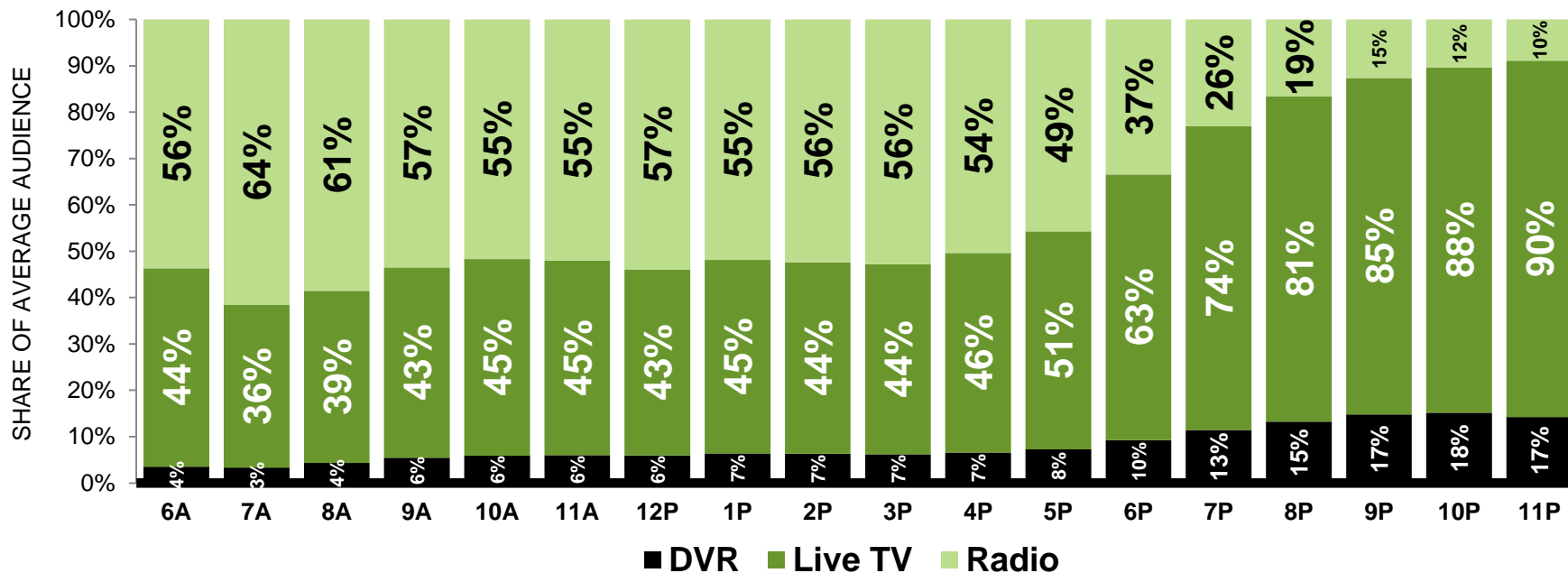
77% reached  
**23% NOT reached**



60% reached  
**40% NOT reached**

# RADIO AND TELEVISION COMPLEMENT EACH OTHER (LIKE “NIGHT AND DAY”)

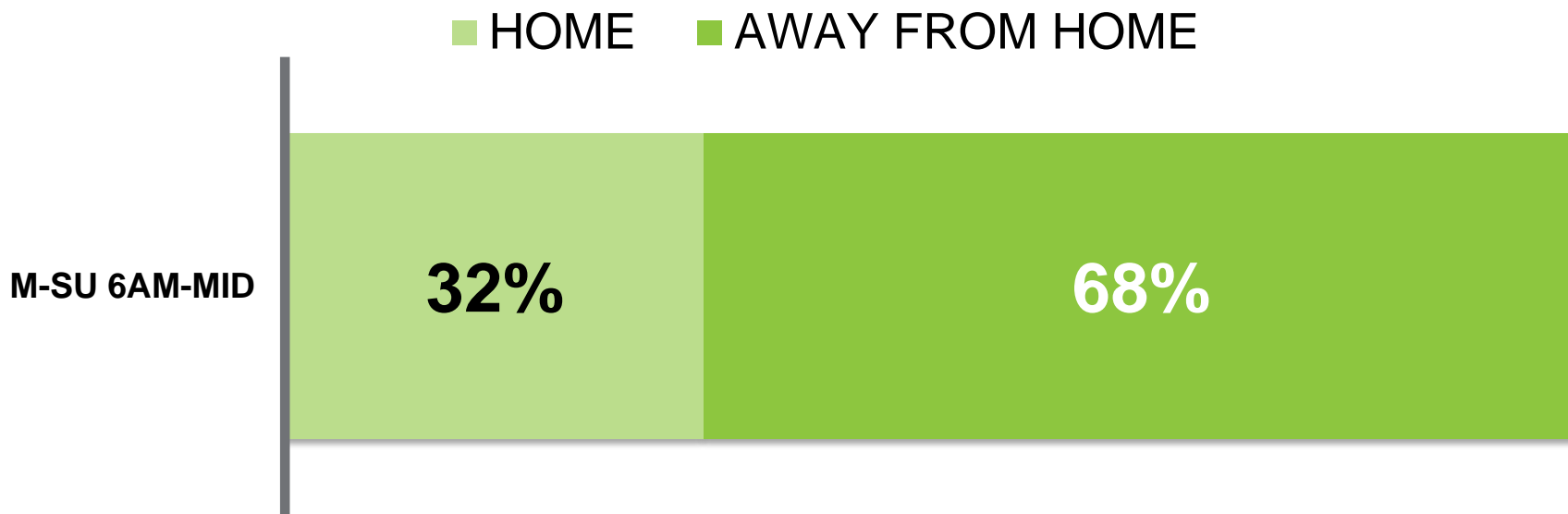
WEEKDAY (M-F) MEDIA USAGE: P18-49 Q4 2017



Source: Nielsen NPower, Q4 2017 Live TV Average Audience / Nielsen FA 2017 NRD for AQH Persons 18-49

# RADIO REACHES PEOPLE AWAY FROM HOME

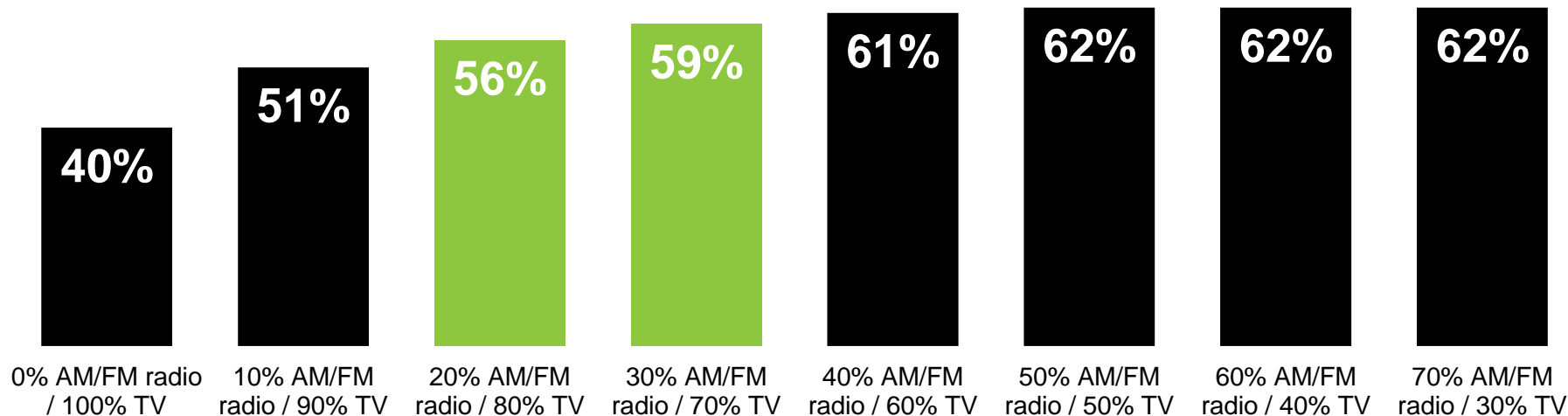
PERSONS 18+ / SHARE OF LISTENING BY LOCATION



# RADIO AMPLIFIES THE REACH OF A TV CAMPAIGN

**HOW TO READ:** For a \$2 Million ad spend, a mix of 20% AM/FM radio and 80% TV reaches 56% of adults each week.

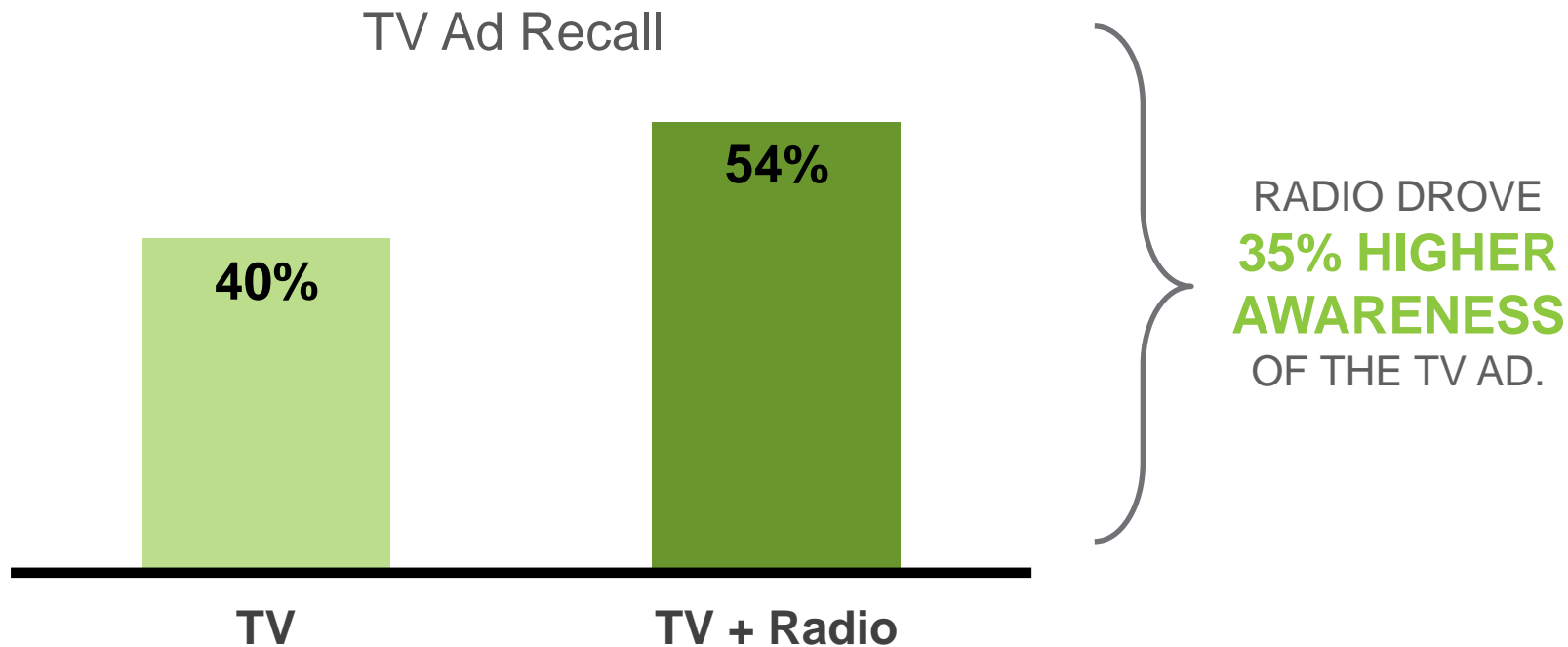
**Sweet Spot**  
**+40%**



Source: Nielsen Commspoint Research US 2016, Adults 25-54, 1 week net reach by GRP level. Budget determined using CPP ratios for Spot TV, Broadcast Network TV, Syndication, Cable TV, and Network Radio from Intermedia Dimensions, Media Dynamics Inc. 2015. Assuming \$5,000 CPP for Network Radio and \$20,000 CPP for Television.

# RADIO INCREASES THE VALUE OF TV CAMPAIGNS

# RADIO BOOSTS THE MEMORABILITY OF TELEVISION ADVERTISING



Source: Nielsen Study- April 2015 / Q. Where else have you seen or heard advertising recently for brand? (Control (503), Exposed (517))

# AM/FM RADIO REACHES AMERICA'S LIGHT TV VIEWERS

## Who:

Significant Audience

According to a first-ever Nielsen study

**44%**

of Americans are light TV viewers

## Challenge:

Difficult to Reach

Light TV viewers represent only

**9%**

of total TV time spent

## Solution:

AM/FM Radio

AM/FM radio reaches

**90%**

of light TV viewers

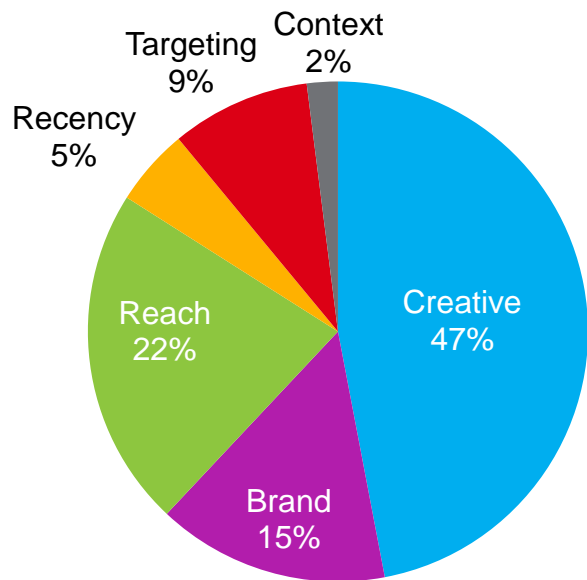
...and makes your TV campaign better

Source: Nielsen PPM March/April 2018, P18-49 (sample size 77,000)

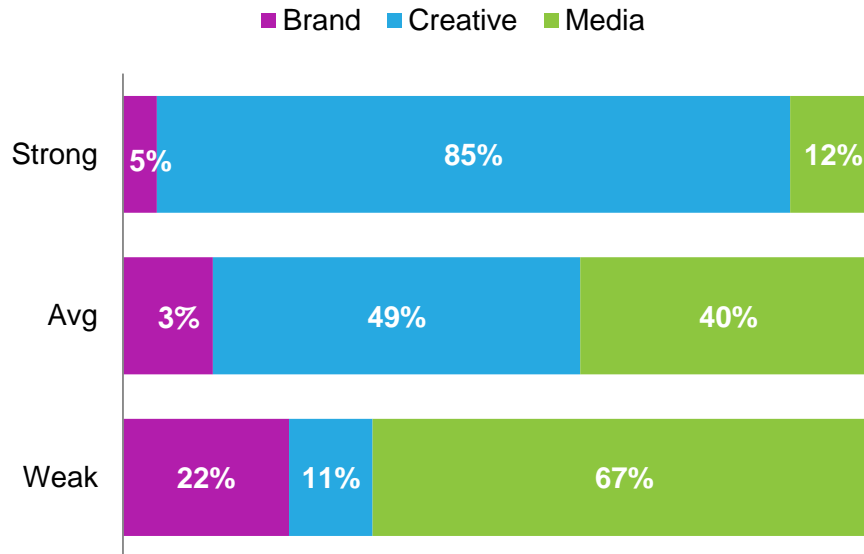
# CREATING GOOD AUDIO: NIELSEN NEURO INSIGHTS

# CREATIVE IS STILL KING

## Contribution of Campaign Elements to Driving Sales



## Sales Contribution by Creative Performance



# CONSUMER NEUROSCIENCE TOOLKIT



## EEG

Multiple sensors to measure attention, emotion and memory



## BIOMETRICS

Skin conductance and heart rate to capture emotional journey



## FACIAL CODING

Expressed emotions (positive, negative, neutral)



## EYE TRACKING

Visual focus on content



## SELF-REPORT

Voice of the consumer

# EEG CAPTURES NON-CONSCIOUS BRAIN RESPONSE

## SECOND BY SECOND PRIMARY MEASURES



### EEG ENGAGEMENT

Summary measure of all three core metrics



### ATTENTION PROCESSING

Measures sustained focus and shifts in focus over time



### EMOTIONAL MOTIVATION

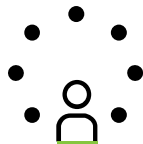
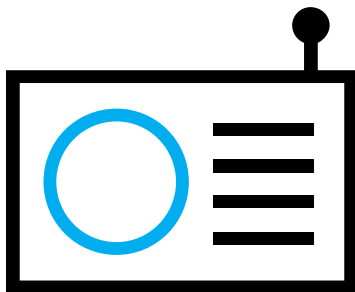
The intensity and extent of being drawn to the experience emotionally



### MEMORY ACTIVATION

The formation of connections – with new and past experiences

# WHAT WORKS WELL?



## CONTEXT

Importance of contextual cues



## HUMOR

Benefits and drawbacks of humor



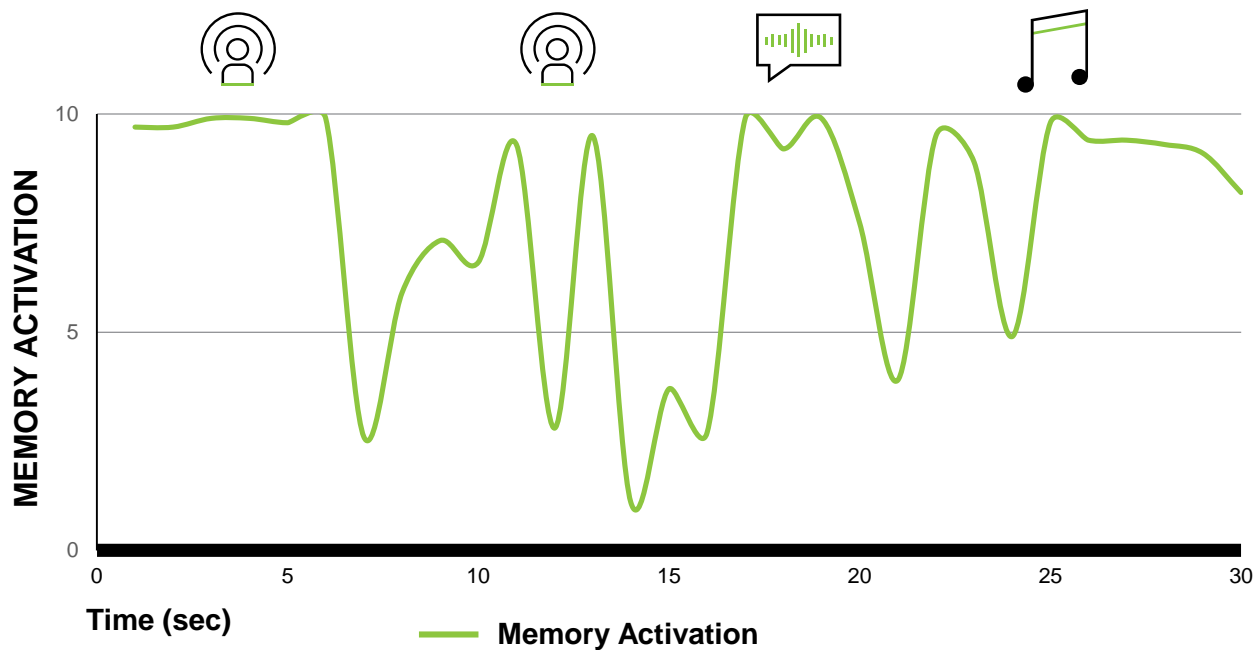
## BRANDING

Role of sonic branding

4 Radio Ads, N=24 per ad, US & UK

Based on Neuro Principles and Supporting Case Study Data

# CONTEXT ACTIVATES MEMORY



Familiar main character



Relatable dialogue



Contextual sound effects

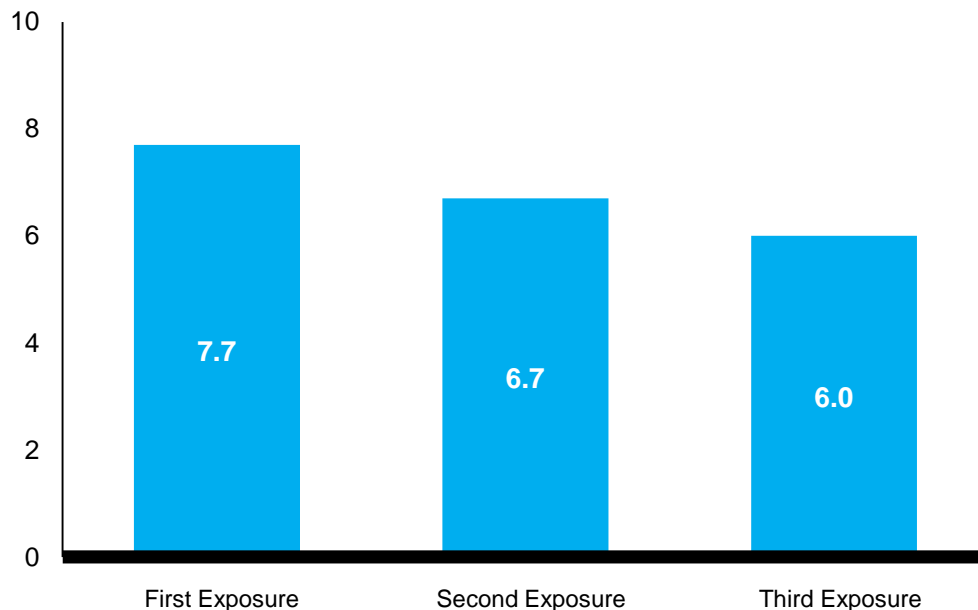
# HUMOR CAN ENGAGE BUT THE JOKE CAN WEAR OUT



HUMOR

n

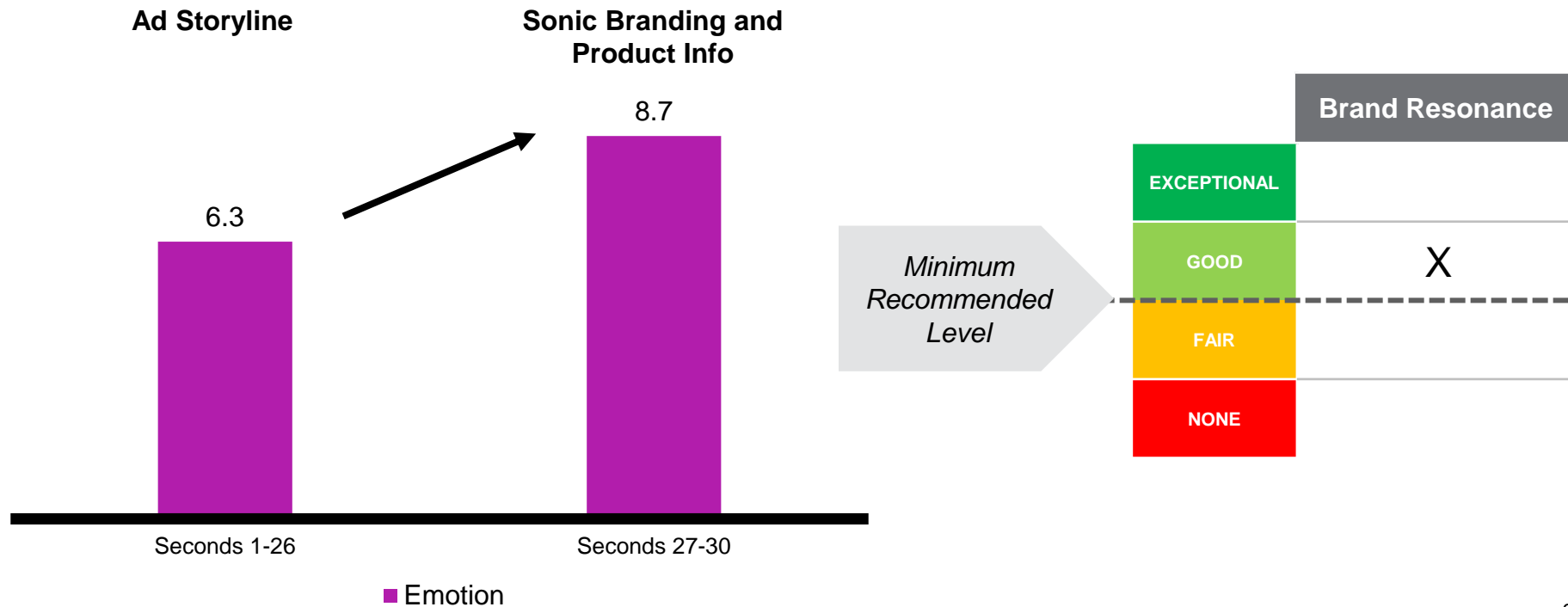
EEG Engagement Over Three Exposures



A difference of 0.8 is required to conclude a significant difference

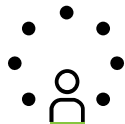


# FAMILIAR SONIC BRANDING DRIVES “LEAN IN” AND CONVEYS THE BRAND



# WHAT WORKS WELL?

## CONTEXT



Contextual clues are important to convey key information and activate memory

## HUMOR



Humor can drive engagement, but the effectiveness of a joke may wear thin with repetition

## BRANDING



Familiar auditory brand assets consistently connect with listeners

# LOCAL NMI

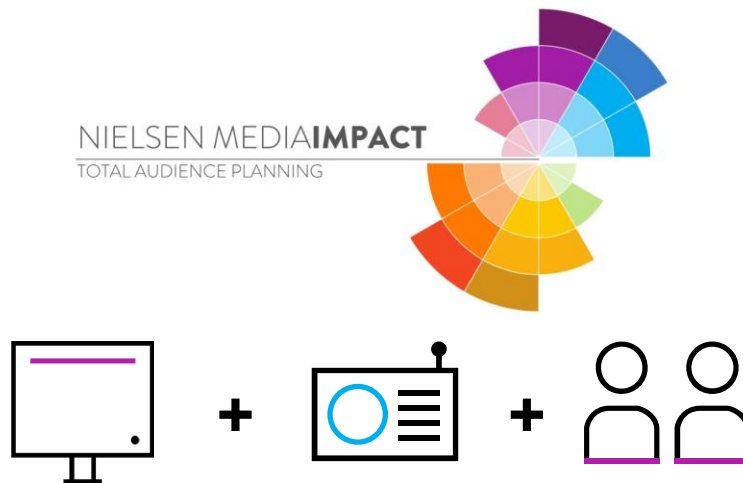


# LOCAL NIELSEN MEDIA IMPACT (NMI)

**NEW!** Local media planning tool - top 25 DMAs

- Derive cross media insights
- True audience duplication
- Advanced target analysis

**Launching:** July 2018



# MAXIMIZE LOCAL REACH

Situation: A Quick Service Restaurant advertised on spot TV June-July 2017. This year their desired reach goal went from 60% to 90% in this market.

## PLAN GOALS 2018

**Market:** Houston, TX

**Category:** Restaurant - Quick Service

**Budget:** \$1.6MM (Constant from 2017)

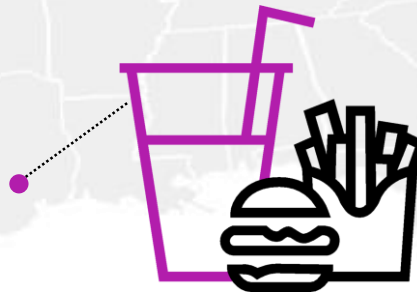
**Planning Period:** June-July 2018

**Primary Target:** A18-49

**Secondary Target:** A18-49 who have dined at competitor in last 30 days

**Desired Reach:** 90%

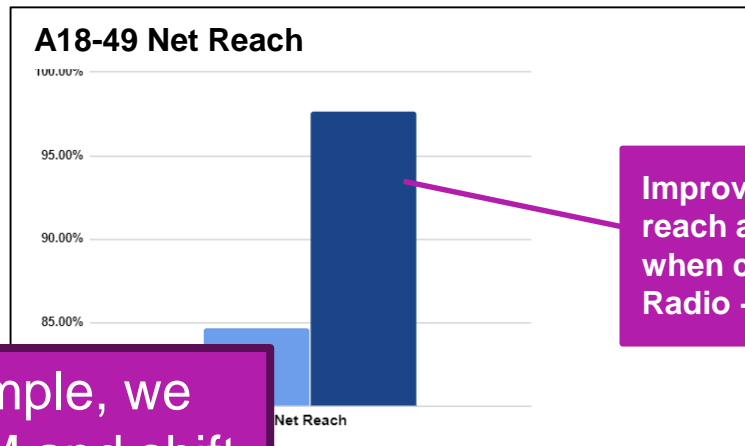
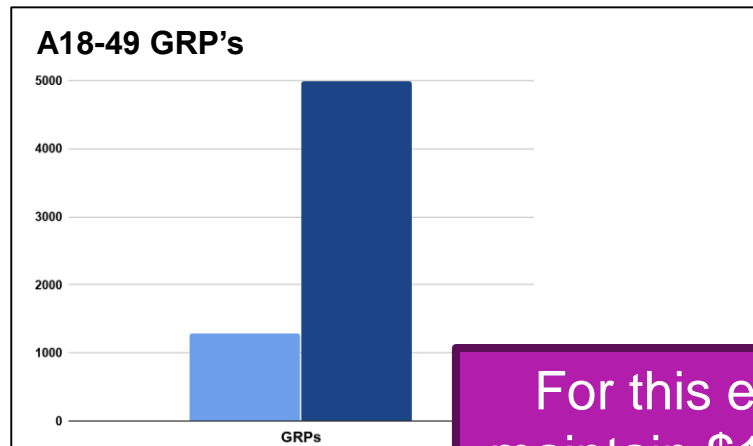
By adding Radio, can we better achieve campaign goals?



# OPTIMIZE FOR INCREMENTAL REACH

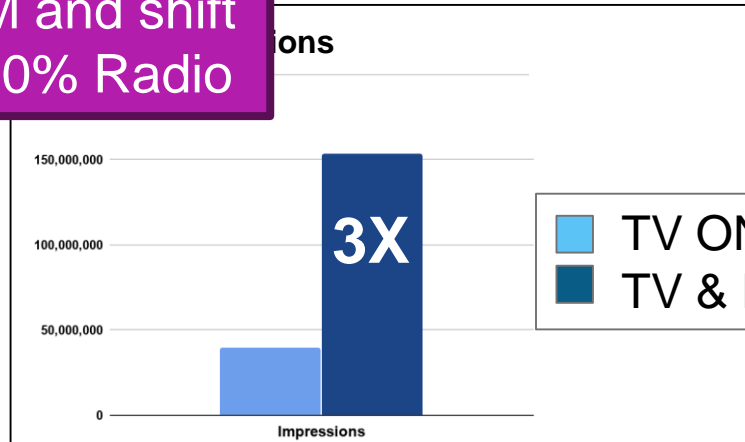
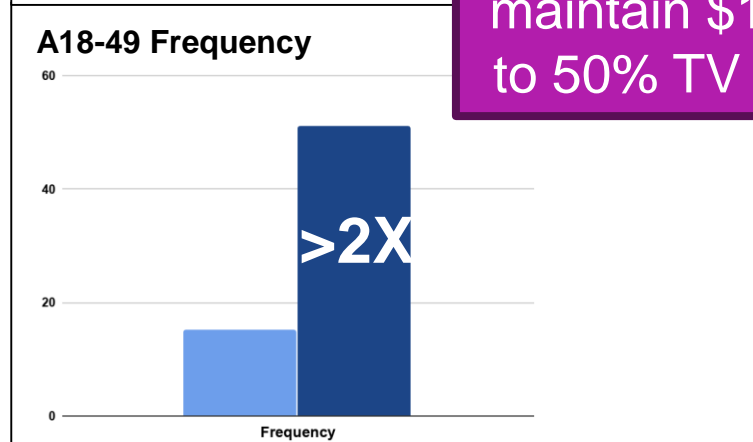
For this example, we  
maintain \$1.6M and shift  
to 50% TV & 50% Radio

# OPTIMIZE FOR INCREMENTAL REACH



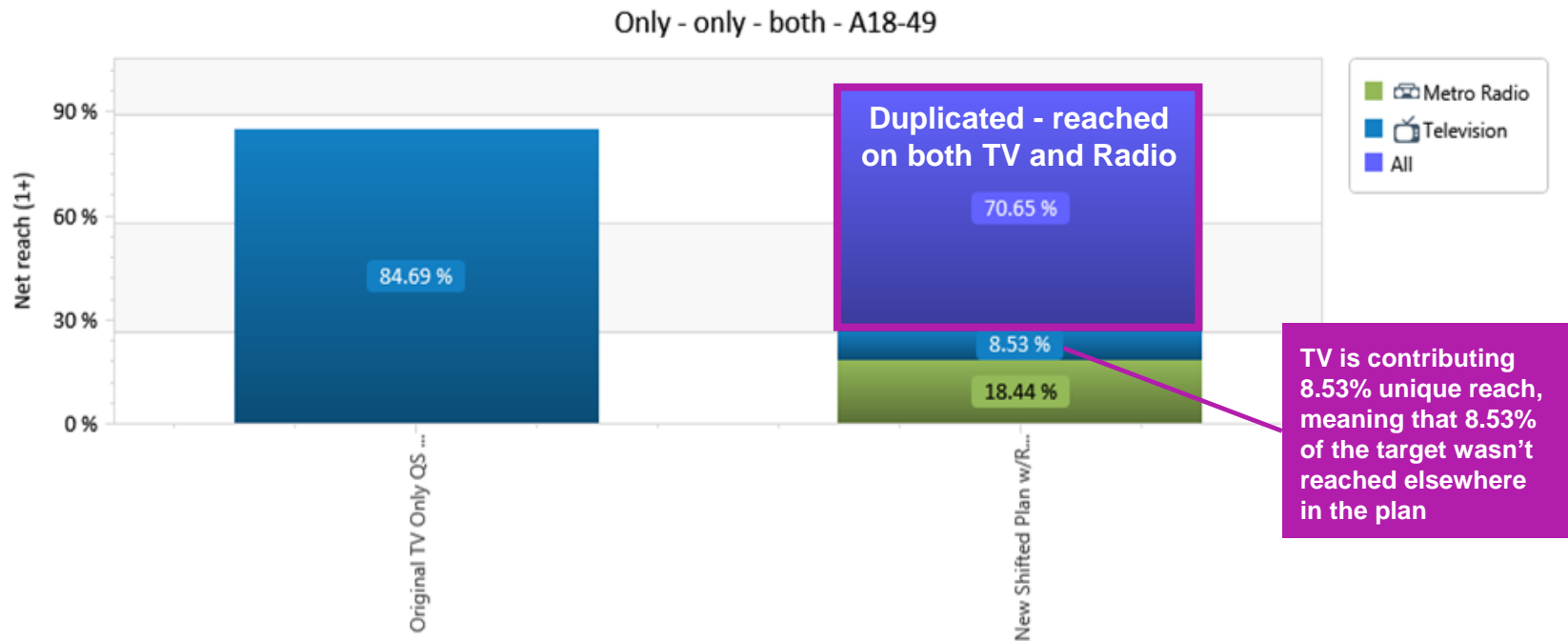
Improved net reach achieved when combining Radio + TV

For this example, we maintain \$1.6M and shift to 50% TV & 50% Radio



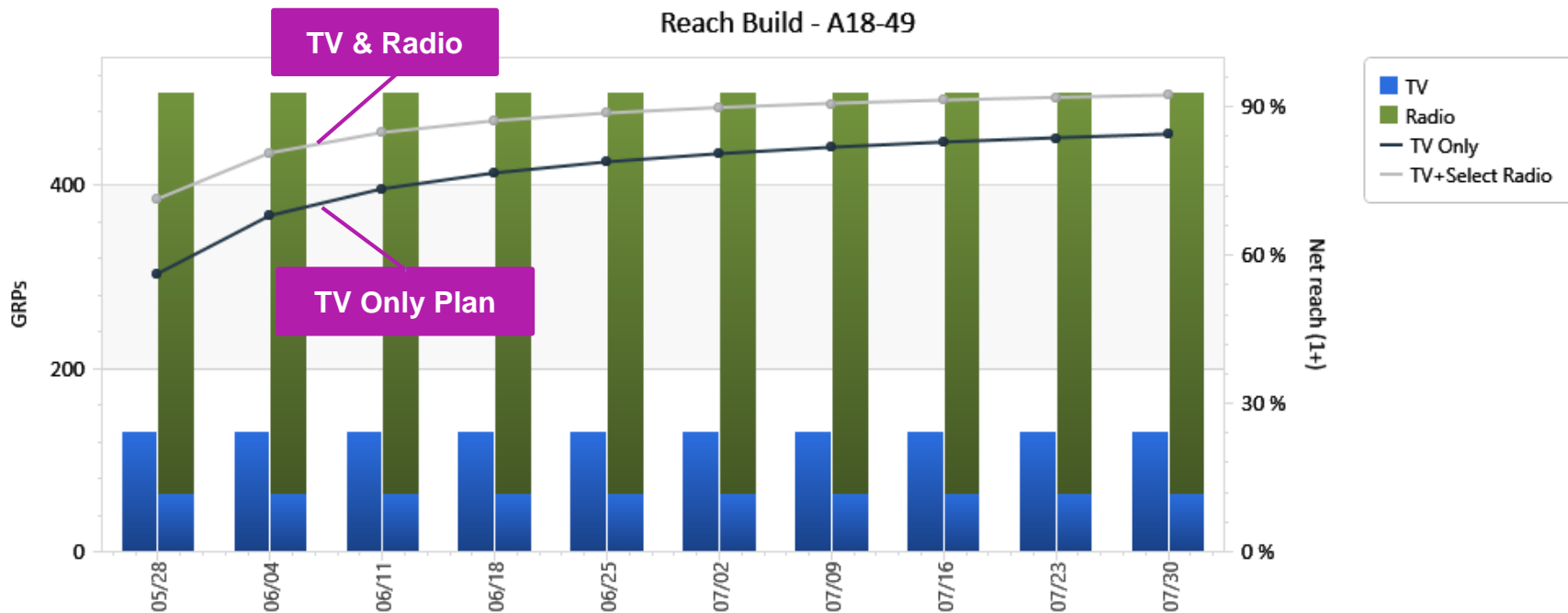
TV ONLY  
TV & Radio

# UNDERSTAND EACH CHANNEL



# OPTIMIZE REACH CURVES

Discover weekly cumulative impact, weight levels and flight patterns

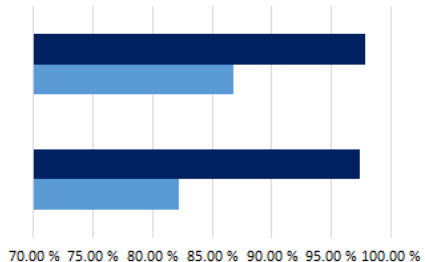


# REACH MORE BUYERS

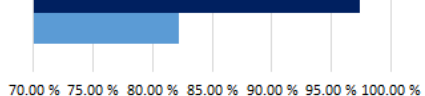
Desired sub-segments and main targets

## A18-49 Plan Analyzer – Health Conscious

Follow a weight loss program

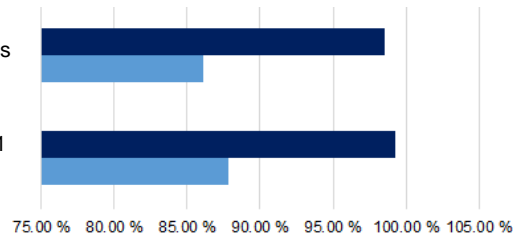


Belong to health club or gym

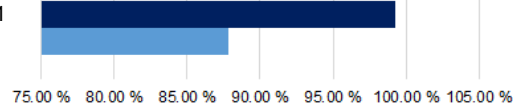


## A18-49 Plan Analyzer – Frequency of Eating at QS Restaurants

10+ times

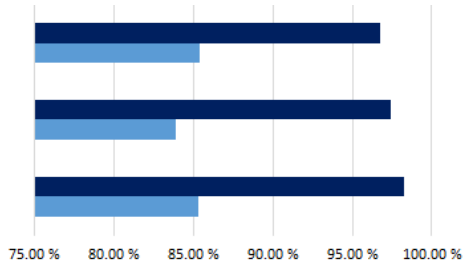


At least 1 time

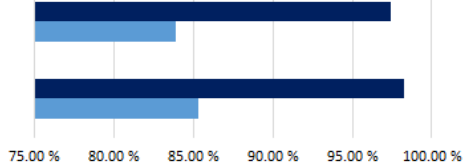


## A18-49 Plan Analyzer – Coupon Use

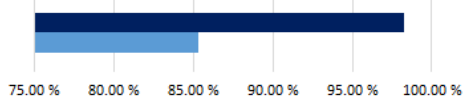
2-3 times a month



Once a week



More than once a week



TV ONLY  
TV & Radio

# IN SUMMARY

**We all listen to Audio, and consumption is growing**

- Radio leads the way in usage

**Advertisers are (re)discovering Radio**

- Reach matters
- Radio compliments/enhances Television

**Start with strong audio creative to get strong ROI**

# Q & A

