



ADVERTISING
WEEKEUROPE



ADVERTISING WEEK EUROPE 2022 DEBRIEF

MAY 2022

Inside Advertising Week Europe 2022: The key trends and talking points

[Advertising Week Europe: Creative Capital](#) touched down in London for the week commencing 16 May.

After two years of waiting, the festival that celebrates all things advertising took over the Picturehouse Central cinema complex in Piccadilly Circus, with screening rooms dedicated to Technology, Innovation, Great Minds, Creativity, The Marketplace and The Boardroom.

For the price of a delegate pass, attendees also received online access to the content. The majority of sessions were streamed live via the festival's website and then made available on-demand 24-hours later.

However, having the option to avoid the session queues, which would disappear daily down the Picturehouse's service staircases, didn't appear to put people off from arriving in their droves and heading into the darkness of the screening rooms to hear from a host of industry experts.

OMD's reporters were both online and in the stairwell queues to bring you the key insights from three of the hotly debated topics.

We take a look at discussions around retail media and e-commerce, the rise of Connected TV (CTV), and 'Attention' as an important focus of measurement for an accelerated digital world.

Highlights include Yahoo encouraging more memorable multi-channel retail experiences to enable discovery and enhance brand saliency, both ShowHeroes and Samba TV revealing research into CTV viewing habits and ad models, and OMD launching *Attention in The Feed* - a research study carried out by Amplified Intelligence and commissioned in partnership with Twitter.

Let's get on with the debrief.

Advertising Week Europe Debrief

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Retail & Commerce Media



Beyond the Basket

Evolved retail preferences mean brands must adapt and shift how they use their assets to engage, inspire and convert customers in exciting and immersive new ways online.

During an opening day session entitled, *Beyond the Basket: How Immersive Retail Experiences Engage Consumers at Every Stage of the Purchase Journey*, Yahoo UK’s head of strategy, Carina Moran discussed the importance of blended digital and physical retail experiences.

“Driving web-based conversions isn’t the end of the purchase journey, since we know that there’s now double the amount of returns for online purchases as there is for in-store, and 80% of consumers will abandon a retailer after only three bad experiences,” she told the audience. “We need to be thinking longer-term by making brand interactions more memorable. Some 86% of Generation Z shoppers now expect their experiences both online and in-store to be seamless, innovative and to enhance their real world.”

Moran’s suggestions for creating memorable multi-channel retail experiences to enable discovery and enhance brand saliency included: immersive in-store mixed reality product showcases; Augmented Reality (AR) in-store gamification; AR in-feed advertising; avatar-based exploration of branded digital worlds; and the creation of branded sellable or reward-driven digital assets (NFTs).

Moran also spoke about the correlation between rewards and customer loyalty and how it translates into the digital space.

She said: “Free shipping and easy returns is a must-have for retail brands online, while at the aspirational end of the spectrum, physical reward experiences could translate into NFTs, allowing digital consumers access to unique brand benefits.”

In conclusion, Moran told the *Advertising Week Europe* audience: “These don’t have to be difficult things to activate. It can be as simple as inserting AR assets into your DSP campaigns. Anything you create, you should be able to plug-in to your own eco-systems to ensure that it can be optimised, it’s measurable, it’s shoppable and you can retarget off the back of it.

“Go beyond persuading shoppers to keep adding to baskets and create memorable consumer experiences along the way.”



The Future of Commerce

Other retail-focused sessions during *Advertising Week Europe* included Asda discussing the ‘*The Future of Commerce Media*’ and Pubmatic’s Senior Director, Babs Kehinde, being interviewed on all things ‘*Retail Media*’.

In response to a series of quick-fire questions from *Advertising Week*’s Global President Ruth Mortimer, Kehinde said: “Retail media is a huge opportunity that remains largely untapped. It’s not a winner-takes-all market. Due to its scale, we’ll see the rise of category champions and regional champions. There’s a huge amount of space for more brands to grow and steal market share.

“I believe we’re only scratching the surface of what retail media has to offer. We have to make it easy for retailers to build and scale their businesses, seamless for consumers to develop relationships with retail brands, measurable with intelligent data usage that informs retail marketing decisions, and above all else, we have to make retail media engaging.”

Asda’s Head of Media Partnerships, Alex Crowe meanwhile discussed the retail giant’s digital transformation. By switching to a first-party data strategy, within a retail-enabled platform, Asda has doubled its conversion rates and revolutionised its online media space for advertisers.

Crowe told the audience: “First-party data from initiatives such as Asda Rewards allows us to better understand our customers, map in-store shopper behaviours with online and provide our advertising partners with closed-loop reporting to determine the effectiveness of their campaigns.

“Our customer insights platform informs us of the decisions that customers are making at a category or product level, while our customer data platform is then mapping data sets to individual customer profiles, allowing us to build-out segments.

“First-party data moves us away from CPC and campaign sales targets so that we can focus on the lifetime customer value, getting certain customer profiles to return more frequently, and trading certain profiles up from lower price-point brands to more premium brands. It’s a win-win environment for both Asda and its FMCG partners.”



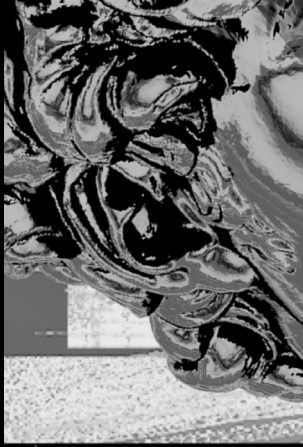
OMD's POV

OMD has been tracking changes in consumer need states and behaviours through proprietary research since 2017. Last year, OMD partnered with OCG (Omnicom Commerce Group) to understand how people wanted to shop following the Covid-19 pandemic. By understanding the 'why' behind the 'buy', OMD and OCG can advise clients on how to ensure they are reaching their audience in the right place, and at the right time.

The latest research wave, conducted in early 2022, is already pointing to a demographic shift in behaviours, with the UK for the first time being seen as the market that best represents the future of commerce.

With the current cost of living crisis, there are natural changes to shopping behaviours, with 88% of UK, and 83% of US consumers looking for cheaper alternatives online.

Another trend emerging is the rise in purchasing power of Millennials. As the first digital generation, this group has seen the biggest increase in purchases from our 2021 to 2022 datasets (up 23.3%), as they are reaching stable incomes, settling down with young families and have wide range purchasing power.



OMD/OCG

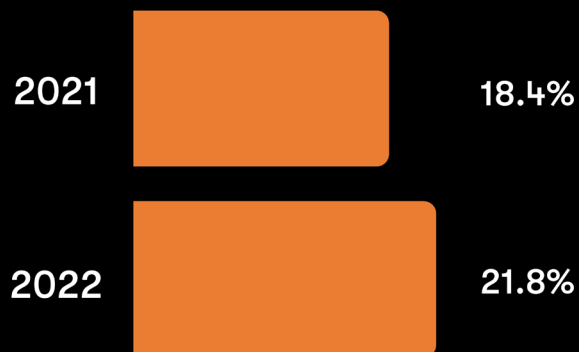
the
why
behind the
buy



Millennials are considered true hybrid shoppers, due to their ability to flex between online and offline, getting the best out of both channels to cater for their needs.

They are also more open to sharing personal data than during the pandemic. In 2021, 18.4% selected to share personal data with companies (government and well-known brands), which rose to 21.8% in 2022.

To find out more on how consumer behaviours are continuing to shift, you can register now to receive your copy of our 2022 research paper 'The Future of Commerce' at omd.com.



% of Millennials that selected to share personal data with companies like government and well-known brands

OMD and OCG's Future of Commerce Study: 2022 Wave Insights

The Rise of Connected TV



The Rise of Connected TV

On day two of *Advertising Week Europe: Creative Capital*, Samba TV released its *The State of Viewership* analysis into Q1 of this year.

The report, which analyses around 12 billion hours of streaming and linear TV throughout the UK and Germany, found that both linear reach and minutes were down 10-13% in the UK and 7% year-on-year in Germany.

As fewer homes watch linear each quarter, the assumption is that viewers are turning to streaming services. Although this is somewhat true (eMarketer data shows a 2% rise in the use of OTT video services in 2022 compared with 2021), Samba TV found that the cost-of-living squeeze is also resulting in UK households opting for cheaper advertiser-driven services and cancelling some of their monthly subscriptions.

In fact, the number of UK households using SVOD declined by more than 1.5million in Q1 2022. One in three of those cancelled subscribers stated ‘cost savings’ as the primary decision-making factor.

Dallas Lawrence, Samba TV's Head of Communications and Brand, talked through the highlights of the analysis during the *Future of TV & Measurement* session.

He told the *Advertising Week Europe* audience: "Data from the first three months of the year paints a clear picture of the challenge advertisers face driving incremental reach beyond traditional linear TV campaigns.

"In Q1 2022, 95% of all linear television ads reached the same 55% of audiences. These medium to high frequency TV viewers, who represent just about half of all linear household viewership, were bombarded with an average of 84 ads per day while the rest of the UK's households were barely reached at all.

"With £5.1 billion poured into linear advertising every year, the opportunity to innovate and rethink how advertisers plan, measure, and execute advertising across every screen in the consumer journey has never been greater."

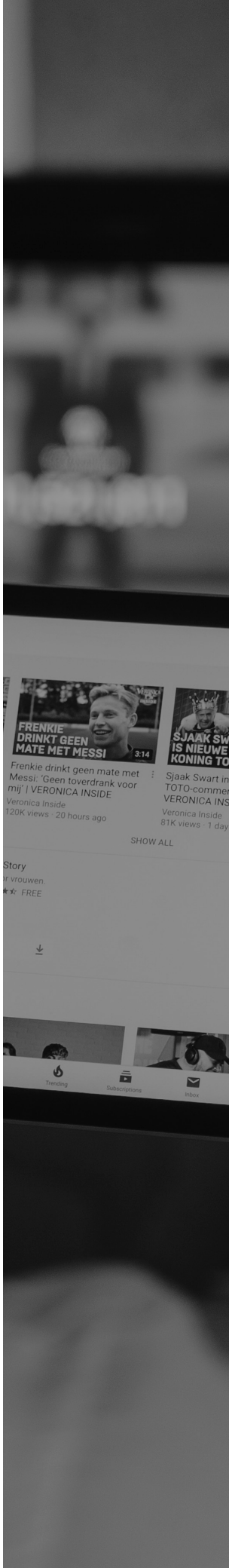
Dallas Lawrence, Samba TV's Head of Communications and Brand

Another CTV report launched during Advertising Week Europe was ShowHeroes' *CTV Reigns Supreme in the Attention Economy* study. Based on eye-tracking analysis, the study reveals an 82% attention rate for CTV compared with 69% for linear television and 42% for social video. The average attention length for CTV ads was 12.2 seconds, while 71% of CTV viewers were found to be in the 'engagement zone' during ad-breaks.

Discussing the advertising implications of the study on the stage were Emma Jensen, Regional Digital Director at PHD Global Business, Karan Singh, Head of Advertiser Partnerships at Xandr and Dory Tse, Senior Client Development Manager at Rakuten Advertising.

PHD's Jensen said: "CTV advertising isn't just about awareness. There's a huge opportunity to explore dynamic creative ACR (Automatic Content Recognition) and by introducing CTAs via QR codes, you can drive second-screen interactivity. QR codes have had a renaissance, due in part to the pandemic, and they're now more accessible across all generations."

Tse agreed, highlighting Rakuten's shoppable ad features as an effective way of correlating brand awareness with actionable purchase intent, by being able to measure and prove viewer interaction and engagement. She said: "Subscription fatigue is driving more viewers to AVOD platforms. What ShowHeroes' study proves is a deeper resonance within a CTV environment. These two factors combined means that contextually relevant advertising is already incredibly powerful within CTV. By making the creative interactive, you are simply adding to that power."



Debating some of the advertising challenges around CTV were the panellists from the *Gloves Off, TVs On: The Battle For Consumer's Attention* session.

Although there was a consensus that CTV is the 'foot in the door' to reach those audiences moving away from linear television, panellists cited a number of road-blocks still to navigate before the industry can truly harness its power.

"CTV creative has to evolve its subtlety as 'in your face' personalisation is just a reminder that you're being tracked," said BBH Group Strategy Director, Niki Jones. "I've not seen anyone prioritising CTV creative ahead of linear as yet."

"We have to simplify CTV and help clients navigate the ecosystem," offered Seun Odeneye, MD UK and Ireland at Matterkind. "I'm worried we'll head down a rabbit hole and find a million ways to measure when really we just need to deliver on key client objectives."



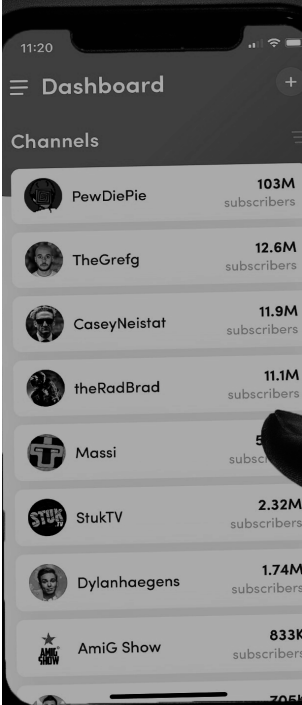
On the final day, Katie Coleman, VP, Head of Advertising & Partnerships at Warner Bros Discovery, continued the conversation around the AVOD streaming ecosystem and its evolutionary challenges.

“With a greater choice of FAST streaming services, consumers will dip in and out of AVOD and SVOD more often as they seek-out more desirable content. Publishers such as Discovery can help linear TV advertisers transition into addressable TV environments with hyper-targeted behavioural, contextual, registration and category-led audience data. But you still need the reach they associate with traditional TV. That’s what CTV is currently missing, the ability to see the full reach picture.”

When discussing CTV’s ability to attract new advertisers who have previously been locked out of expensive traditional TV buying, Coleman also flagged the importance of creative.

“It’s great that there’s more low-entry CTV routes to market. But, if you’re watching an ad on a big screen, the creative of that ad has to be good enough to be on that big screen - we don’t want to be getting into local cinema advertising. I don’t think all ads should carry QR codes but they’re effective in the right place. We’ll shortly be launching pause ads and that’s a brilliant format to place QR codes within.”

Over-delivering on ad frequency, which results in a poor CTV viewer experience, was another area tackled by Coleman, “Programmatic enables us to source new advertisers and bring about diversity of advertiser on the network. Whereas those publishers with a lack of demand and a lack of scale end-up showing the same adverts too many times.”



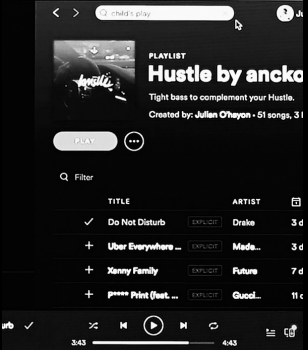
OMD's POV

As the entire industry gets comfortable with a new measurement reality, the client demand for such services is high. We can expect to see a diverse range of new inventory sources in the CTV space as the sector is expected to double in three years to 2024 up to USD \$29.50bn.

Access to these opportunities is scaling already. Omnicom announced last month the deal to incorporate [LG CTV inventory into Omni](#), Omnicom's industry-leading operating system.

Omni has more privacy-compliant datasets than any competitive data offering and a suite of proprietary applications that can integrate with clients' first-party data, plus technology to deliver an unprecedented level of marketing orchestration.

The integration enables account teams across OMG to activate advanced targeting segments from Omni across 20+ million LG smart TV households in the U.S, matching the anonymised data of LG Ads Solutions to Omni's internal graph. Omni will scale simple ways to manage campaigns and leverage data from the millions of households that have connected LG devices, whilst upholding privacy compliance.



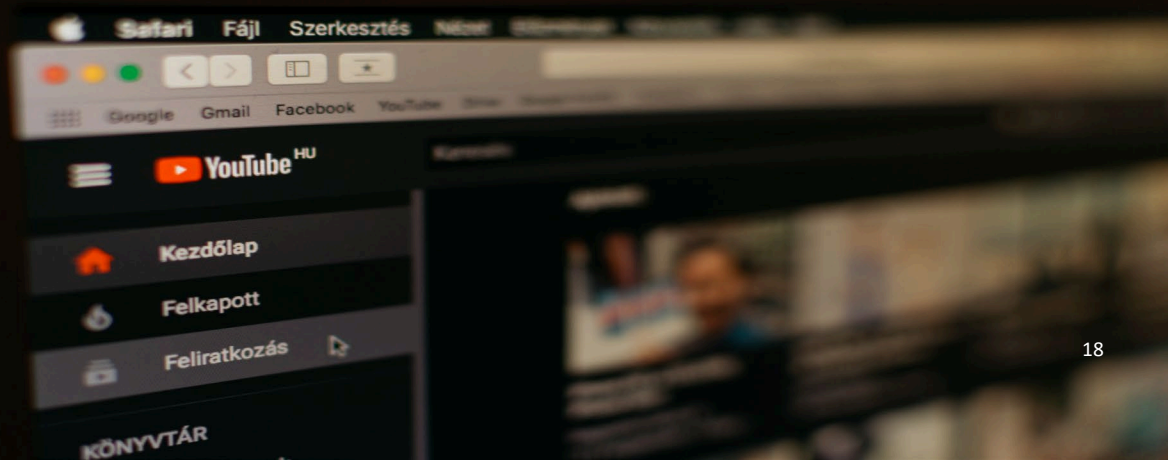
Connected TV data sets also enable more effective measurement as sample sizes rise to the millions. The looming threat of ad fraud is minimised when dealing directly with the inventory provider.

Deep insight into the context, occasion, device, and more will be vital as consumers do more with their subscriptions. For example, listening to audio across a greater number and range of devices means that brands will need to design for a greater range of consumption contexts and manage new data points.

The industry had been worrying that the streaming revolution would see a simple shift in model from ad-funded to subscriber-funded, with a whole tranche of consumer media consumption lost to advertisers. However, it is becoming increasingly clear that the streaming sector needs to provide ad-funded tiers to drive growth. Consumers will welcome the opportunity to manage their spending, especially in tough economic times.

“Where every other digital medium is becoming less addressable because of identity fragmentation and challenges with identity, TV is becoming more addressable. We’re in a really good spot as an industry; we just need to get our act together on the measurement side,”

Kelly Metz, Managing Director of Advanced TV Activation, Omnicom Media Group



Measuring Attention

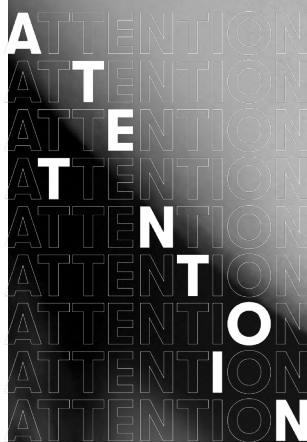


One of the recurring themes and discussion points over the four days of *Advertising Week Europe* was ‘Attention’. A range of panels and speakers discussed its definition, how to measure it and its importance in a ‘cookie-less’ digital world.

In *Attention: Measurement and Outcomes Moving Forward*, Justin Pearce, Editor of *NewDigitalAge* hosted a panel that featured Omnicom Media Group’s Managing Partner, Ad Tech Strategy & Co-ordination, Chris Swarbrick, Dentsu’s Product Partner Arunan Senathirajah, DoubleVerify’s Senior Enterprise Sales Director, Betty Vo and Publicis’ Associate Director (Global Digital Standards), Diana Romero.

Dentsu’s Senathirajah said: “Attention is increasingly becoming more important as a metric and you can no longer have effective outcomes without it. Therefore we have to work together as an industry to decide how to capture it.”

Publicis’ Romero agrees and believes the advertising industry needs to approach ‘Attention’ metrics with an ‘open and curious mind’. “There’s currently no one-size fits all approach in this space so I’d advise to start with the low-hanging fruit and invest heavily in research,” she said.



DoubleVerify's Vo concurred. "Test and learn, test and learn. Don't assume what is right for one client campaign will be right for another," she said. "Viewability was such a crude tool to define media quality. Attention is more powerful and should be better thought-out so that it correlates to campaign outcomes."

Omnicom Media Group's Swarbrick concluded by saying: "Viewability is binary and you can set thresholds, but 'Attention' varies according to the campaign challenges you're trying to solve. Eye-tracking will be fundamental but let's not be naive to the challenges of ensuring that 'Attention' is a privacy-safe metric for the future."



OMD meanwhile used the *Advertising Week Europe* stage to launch *Attention in The Feed* - a research study carried out by Amplified Intelligence and commissioned in partnership with Twitter to discover the interplay between active and passive 'Attention' within social media feeds.

The study looked at 16 test ads across four platforms in the UK, France, Canada and Mexico. Across the four markets, 3,960 respondents agreed to test the in-feed ads from brands from sectors including Automotive, FMCG and Entertainment.

Their responses were then assessed according to three metrics - attention seconds, short-term advertising strength (STAS) and mental availability (the likelihood of a brand coming to mind at a purchase occasion or category cue).

Of the four platforms analysed, Twitter generated the highest levels of attention seconds overall, with a proportion being passive. This shows that a combination of both active and passive attention drives impact. When active attention is quick and fleeting, passive attention adds an opportunity to notice.

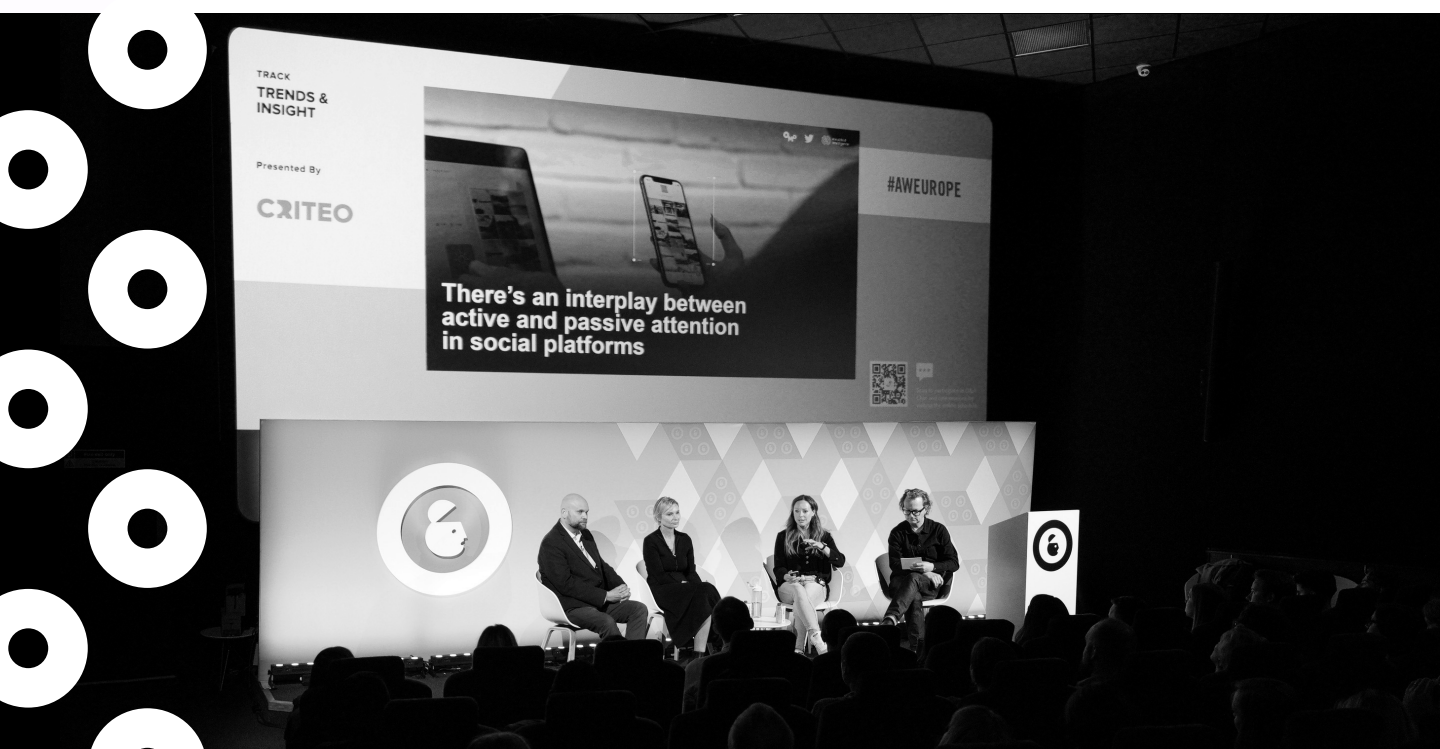
Across all four of the scrollable formats, the research further discovered that ad length is not related to active attention seconds. So, placing longer ads within those feeds that command more attention seconds won't necessarily bestow more attention. Instead, it'll most likely generate more wastage.

Shorter ads that stimulate quick-fire bursts of attention were therefore found to be more effective across all platform feeds, generating strong uplift in mental availability after just one exposure.

Moreover, there was also a small additional uplift in active attention when in-feed sound was turned on.

On applying the study's findings to designing for feed formats, in order to better capitalise on the attention opportunity, OMD Worldwide's Managing Director, Product, Jean-Paul Edwards told the audience: "Ads must be optimised for the in-feed experience and there are some core creative cues that we know make a difference. Use an early hook to get across immediate impact, include a logo throughout, cut straight to a shot of a human as people are drawn to faces, and keep video ads ideally to six or ten-second cuts."

On 'Attention's' place within media measurement, Twitter's Head of Agency Research, Lisa Cowie concluded by echoing a sentiment voiced by many other panellists across the *Advertising Week Europe* schedule.



“Any calls for the standardisation of ‘Attention’ metrics aren’t helpful. This study proves that ‘Attention’ varies across different social platforms. It also differs according to the medium. We all need to be changing our industry to better understand ‘Attention’ whether it’s within a scrolling, swiping, TV, cinema or any other media environment.”

Lisa Cowie, Head of Agency Research, Twitter



Jean-Paul Edwards, Karen Nelson-Field, Lisa Cowie and Andy Upton

The revolution in ‘Attention’ campaign optimisation and planning is an ongoing, but necessary evolution away from reliance in ‘Viewability’ alone. The notion that an advert will be seen is indeed a construct of human attention but ‘Attention’ accounts for how and why a viewer responds to that ad. In other words, ‘Viewability’ is not enough – you can’t ‘game’ the system.

We need to track attention and remember that not all ‘Attention’ is the same. An ad can be viewable, with no attention paid while some ad placements with low ‘Viewability’ can score highly on certain ‘Attention’ metrics.

OMD’s work to date on Attention can be viewed on [ombd.com](https://www.ombd.com), and as we continue to build our body of evidence, we welcome any interested parties to contact us to find out more at marketingworldwide@ombd.com.

It's time to pay Attention

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