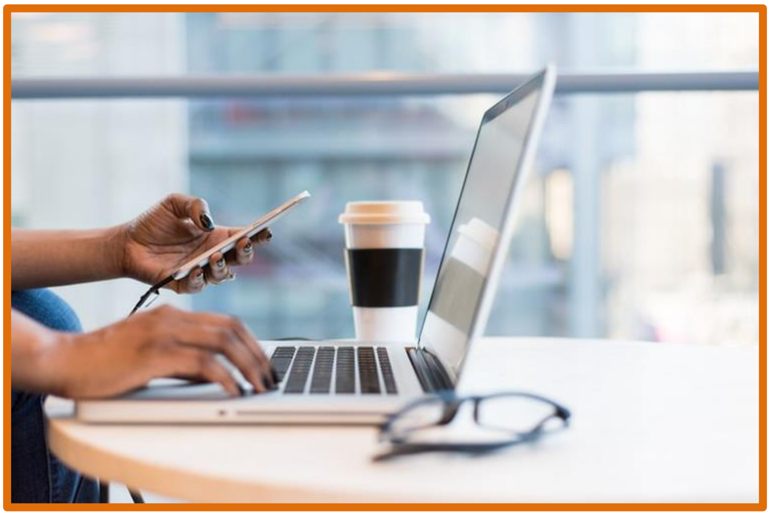
VOICES4ALL



Minority ethnic groups account for [8.1 million people]in the UK: that's 13% of the UK population and is continuing to grow. Yet no matter how sophisticated its techniques, consumer research is somehow failing to break through and extract insights from one of Britain's fastest-growing and most influential demographics.

The same oversight applies to other minority groups, such as those who identify as LGBTQ+ (2.2% of the UK population). These are all significant consumer groups. So how can brands move from "we think" to "we know" – the golden mantle of all robust market research – if these voices aren't included as an integral and assumed part of that knowledge?

In short, they can't and we run the risk of creating generalisations about groups, who can be vastly different. But this lower level of representation is in part driven by a number of practical barriers; reaching robust sample sizes in these groups is expensive. As an example, to send a questionnaire to someone who is LGBTQ+ would be £8-£10 compared to someone who is a main shopper, which would be £1.25-£2. In addition, to translate a questionnaire to Polish (the second most spoken language in the UK) would cost £350-£390. Equally the repercussions of mishandling sensitive data such as ethnicity, religious, sexual orientation due to GDPR paired with a fear of offending has in some instances created an avoidance of ensuring these groups are represented in research.

But when we are conducting nationally representative research, we shouldn't be hindered by these practical barriers and a definition that doesn't reflect modern society. Currently within the UK the definition of nationally representative research requires quotas on: age, gender, social grade and region meaning that ethnicity and sexual orientation are not included with the definition. If these aren't included then research cannot claim to be nationally representative if it's not based on an effort to reach all sections of society. Worse still, by failing to do this it runs the risk of making clumsy and misleading generalisations.

At the7stars we believe that the research we conduct should reflect the views of all voices in society, therefore one of the first steps we have taken is to come together with five other founding partners to create Voices4All, a movement committed to improving diversity and inclusion standards within research services.

We have signed the open letter that calls for action to make ethnicity and sexual orientation (in addition to age, gender, region and social grade) quotas a minimum requirement for all NatRep research samples. As such, moving forward all new proprietary nationally representative research from the7stars will include ethnicity and sexual orientation within our quotas alongside age, gender, social grade and region.

We invite you all to sign up to join us in raising diversity and inclusion standards across the Market Research and Marketing Industries, https://www.voices4all.co.uk/. Ensuring that all voices are heard.

BACK TO SCHOOL, BACK TO REALITY.

In previous years we've looked to September as a time of optimism and a moment to reset after the highs of summer. This year, the backdrop of recession and returning to work and school after many months of life at home means advertisers need to think a little differently about what this period holds for their audience.

2020 has seen uncertainty reflected in a delayed interest in "back to school shopping" with Google search trends rising two weeks later (from the 3rd week in July) vs the last 5 years (typically beginning to rise from early July)[1]. As the government's campaign for a safe return to schools gets underway, here are three ways we've seen advertisers shift their approaches to Back To School marketing in line with the new reality:

Continued growth of online: Back to school shopping is no exception to the significant growth in online shopping. According to research over 90% of parents with kids and university students will shop online for back-to-school[2]. For retailers in particular we have seen an increase in "buy online" messaging, with Sainsbury's and Tesco both reflecting the wider shift to online grocery shopping within their creative copy.

A focus on hygiene: Sanitiser, masks and cleaning supplies have made their way to the top of the list of essentials[2], displacing historical focus on items like technology. As a result, new brands are finding ways to be a part of the back to school moment. Dettol's recent campaign focuses on laundry detergent as parent's get ready for the school uniform laundry routine while Boots have recently launched a radio campaign focusing on children's vitamins.

The importance of empathy in uncertain times: Back to School represents a significant milestone for everyone in the context of lockdown easing, and with this reassurance is key. Research in the US has show that advertisers treading the line between positivity and empathy are seeing their ads resonate stronger with consumers[3]. This sits at the heart of Very's back to school campaign, which focuses on "back to school joy for everyone" – acknowledging the positives in a distinctive way that helps cut through an increasingly competitive moment[4].

For many marketers, seasonal milestones like Back to School involve tried and tested methods and well-established consumer behaviours. But as we move through these milestones in the context of the pandemic, challenging what we know about consumers and their behaviours is key to maximising opportunities new and old.

[1]https://trends.google.com/trends/explore?date=today%205-y&geo=GB&gprop=youtube&q=%22back%20to%20school%22
[2]https://blog.rakutenadvertising.com/en-uk/insights/infographic-back-to-school-shopping/
[3]https://www.marketingdive.com/news/retailers-back-to-school-ads-resonate-by-empathizing-with-uncertainty-stu/583443/;
[4]https://www.youtube.com/playlist?list=PLfGCjZWWx9n3HkCnu3ElVA_gog4HisSjj

WHAT LIFE LOOKS LIKE FOR OOH NOW?

As more people become accustomed to the one-way systems and sanitisation procedures in the dining and retail sectors, the easily observed reduction in consumer visits to stores and restaurants is starting to plateau and hopefully this means a return for one of the channels that was heavily impacted over lockdown – OOH – however, the game has inevitably and certainly changed.

Covid has accelerated the evolution of brand-to-consumer and even B2B interactions and relationships – we only need to look at the increase in use of apps like Zoom and Teams to appreciate this trend. Innovations in the OOH space have also been fast tracked due to Covid – and we expect to see this include the adoption of DOOH tech. [3]

OOH is famed for effectiveness through high reach but the pandemic has led to its large scale audiences decreasing in certain demographics [3]. Key areas for OOH such as airports and the London Underground are still experiencing a dramatic decrease in footfall[2]. This means that OOH will likely have to become a more targeted and outcome-based channel to justify its use. Luckily there has been ample investment into digital screens and infrastructure over the last decade.

Bitposter and Clearchannel's partnership with traditional OOH key-players has meant that many paper and paste locations have been digitalised, whilst Global's purchase and integration of Exterion and Primesite (linking DAX with their digital outdoor sites) has meant data-led buying has become a reality. This also goes beyond media buying and into execution, with Ocean Outdoor releasing mid-air haptic interaction, to replace their touchscreen equipment [4].

Whilst innovation development has been fast tracked, the dynamic of clients that they were designed to serve has shifted.

The ad spend market has shifted in line with the change in consumers priorities. Essential goods, tech, and the high-frequency Public Health England campaigns have recently ramped up media spend [5], whilst industries like the restaurant sector have seen dramatic cuts. Ironically, OOH was a key channel for PHE in communicating key messages and provided a smart, empathetic and trustworthy platform [3].

So, what's next for the restaurant sector? American super-chain McDonalds have bucked the trend, as even though they reduced their budgets by 100% during lockdown, they are now keen to use their 'war chest' of advertising budget for Q3 and Q4 [6].

As for the restaurant sector as a whole, total media spend was down dramatically for May and June YoY (-91% and -86% respectively), and OOH is no exception. Whilst we are seeing an improvement in August spend and expect to see more buoyant results in Q4 overall, it will be interesting to see how brands use OOH in Q4 – particularly for Christmas which is typically a strong period for OOH [1].

1] https://www.marketingweek.com/consumer-spending-retail-footfall-christmas-5-interesting-stats-to-start-your-week/

[2] https://www.telegraph.co.uk/news/2020/07/17/charts-has-covid-brought-end-daily-commute/

[3] https://www.campaignlive.co.uk/article/ooh-back-not-know/1691428

[4] https://www.essentialretail.com/news/ocean-outdoor-touchless-ad-screens/

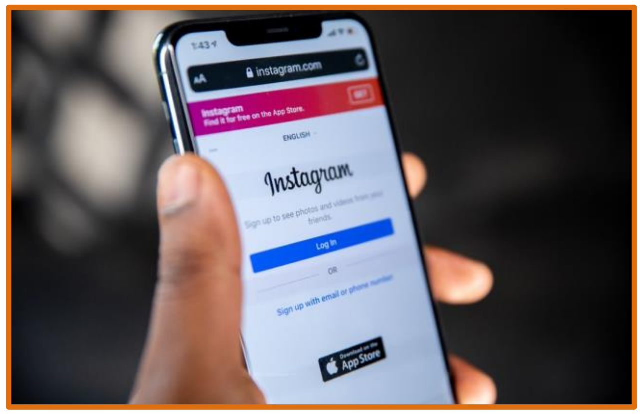
[5] https://www.campaignlive.co.uk/article/nielsen-uk-adspend-dived-48-lockdown-brands-pulled-11bn/1691019

[6] https://www.marketingweek.com/mcdonalds-spend-marketing-warchest-coronavirus/

POSITIVE NEWS THIS MONTH

So… Is TikTok getting banned in the US? Currently, no one seems to know. The hit social media platform of 2020 is hugely popular in the US, with around 36.9m users. This tops the list worldwide, with India originally leading the way before their own ban. Donald Trump has attacked the app for supposedly leaking information to China, but TikTok have updated their Community Guidelines in response to concern. Now, TikTok is in talks with Microsoft. TikTok fans across the globe can only wait to see what impacts the developments will have.

Considering the vast popularity of TikTok, it comes as little surprise to many that Instagram have released a rival feature. Instagram 'Reels' invite users to shoot 15-second clips with audio and visual effects. These can be shared to your followers or the wider platform through a new space in the Explore section. The obvious similarities with TikTok has provoked scepticism, but given the popularity of Instagram Stories, Reels may be the next big thing.



Snapchat can now add music pre or post-capture from a "robust" catalogue of songs. This is the result of the platform's deal with music industry partners, including Warner Music Group, Warner Chappell, Universal Music Publishing Group, NMPA publisher members and Merlin, among others. When users receive a snap with the music overlay, they will be able to swipe to view album artwork, title and name. There will also be the option "Play This Song" in full through the user's preferred music streaming platform.

the7stars' sister agency, Bountiful Cow, brought the worlds first drinkable ad (kind of) to our screens. The TV ad gave away 45,000 free beers through a QR code that appeared on screen. QR codes were first created back in 1994, but with restaurants and bars now adopting them as part of their Track & Trace precautions, 2020 might be the year they take off. We love this example of creative media.