

WHAT'S HOT

October 2020



SEARCHING FOR ANSWERS IN SHARE OF SEARCH?



Share of Search (SoS) was the hot topic of 2020's Eff Week and subject of the much-anticipated keynote from Les Binet. Binet is famed for his work with Peter Field on two marketing effectiveness principles: 1) the role of Extra Share of Voice (ESoV) in growing Share of market (SoM) and 2) the optimal 60/40 split between brand and activation.

Share of Search shows promise as a leading indicator, sitting between SoV and SoM. Or as Binet put it: a metric somewhere between brand salience and brand consideration. Intuitively it makes sense – we search for things (and so brands) we've heard about, are interested in and looking to find.

Using Google Trends search data, Binet proved a predictive correlation between SoS and SoM in three categories: automotive, energy and telecomms. Across the categories, changes in advertising spend (SoV) correlated with changes in search (SoS). Effects were not just immediate: advertising had a lasting impact on brand search growth.

There are already many questions surrounding SoS's usefulness:

"It's not a universally valuable metric"

Comparing search for Audi with Volkswagen (two distinctive names) is one thing, comparing searches of the term Boots, with has multiple relevancies brings in more noise. Search also fails to account for sentiment - as Binet himself warned. The emissions scandal saw Volkswagen search rocket, which was not indicative of an oncoming increase in share of market. And so, as with any dataset, applying human understanding of the wider context is critical.

"The integrity of Google Trends is unclear"

Google are famously secretive, and Google Trends data is no exception. Data is shared as an aggregate index, rather than absolute search values. This makes it especially unreliable for small search queries or in categories where one query is much larger than the rest.

Google Trends benefit is that it is publicly available, allowing accessible and comparable data with competitors and is refreshed daily, meaning changes can offer an early warning to brands.

"It obscures category growth"

Where categories are experiencing fast growth (or decline) benchmarking purely on a "share of" metric will obscure the full picture, which could lead to early decisions not indicative of the commercial reality. We can get around this, at least in part, by tracking search patterns over time by brand.

"Byron Sharp doesn't like it"

Byron Sharp's criticisms are that it is a simple mathematical model. However, this simplicity is also its charm: share of search can be easily adopted and used by marketers across multiple categories.

Those hoping that Share of Search would offer a panacea may be disappointed. What SoS does offer is a helpful snapshot that brings brand and performance closer together. It has strong potential as an intuitive and useful leading indicator and offers a current view of brand's place in their category, especially as it can be applied cheaply, quickly and often.

Critically though, as with any metric, Share of Search tells us what is going on, but not the how, or why. Answering these questions remains an art, not just a science.



BEYOND BINARY – HOW BRANDS CAN NAVIGATE GENDER REPRESENTATION



Over the last eight decades, we've seen a great deal of change in cultural representations of gender and gendered behaviours. As we enter the third decade of the 20th Century, we once again find ourselves in a pivotal moment of social evolution, whereby traditional binary gendered roles are becoming more problematised, as gender fluidity becomes more dominant in culture.

At the7stars, we partnered with leading cultural insights agency Sign Salad and ground breaking neuromarketing agency Neuro-Insight, to help brands understand the evolving gender spectrum. From this, we have identified three key themes that can be used to stay on top, and engage with, these emerging cultural developments.

Our first theme explores how the human brain has been subject to decades of ritualised conditioning, meaning traditional gendered stories are often deeply engrained within us. However, our brains can be re-conditioned when norms are challenged from brands, which in turn drive positive engagement. Therefore, there is an opportunity for brands to help form new subconscious gender narratives and be at the forefront of the evolving gender story. Rihanna's beauty and lifestyle brand Fenty has been widely praised for their inclusive approach to gender by including men in their latest skincare launch [video](#) and creating a new culture of skincare.

We are then able to recommend how brands can effectively respond to these gender shifts within society in a relevant way, that also acknowledges that gender equality is an intersectional issue – and experiences of gender is dependent on individual contexts. Humour can be a highly effective method for brands to authentically challenge existing norms and facilitate memorability and recall – like Heineken's 'Cheers To All' [ad](#). Further, empathy is also a brilliant means for brands to tap into stories that are relevant to their audiences' lived experiences, concerns and desires.

Finally, we reveal what we're currently seeing in emerging culture: a shift between a binary male and female, to one which gender is seen as a flexible construct, and a series of choices. With three quarters of GenZ believing they're more likely to see gender as a fluid construct than previous generations (the7stars AtoGenZ, 2020), it's important that brands start thinking how to communicate the desire for greater inclusivity within culture. Last year Pokémon Go released their first non-binary character, Blanche, bringing awareness of this cultural shift to a mass reaching gaming audience through the Nintendo franchise.

There's a lot to celebrate when we look at the evolution of gender representation in recent years, and the move away from stereotypes in mass media. And there's an opportunity for brands to help create a more inclusive norm and use their influence to reflect the world consumers want to see, and to be seen in.

To read our whitepaper in full, please download a free copy [here](#).



TIERS & TARGETING



On Monday 12th October a new local three-tiered system was introduced to define which areas in the UK are higher risk than others, and where more lockdown measures need to be taken. Local targeting has always been important, but now that Liverpoolians will have starkly different lifestyles to the Cornish it has never been more crucial for advertisers to consider how they're talking to customers in different locations.

Targeting people based on location can mean many things. From buying OOH within 100 metres of your stores to encourage footfall to excluding people from your paid search campaign who live somewhere where your product is not available. Papa John's ran a successful campaign in London last year where customers were targeted only if they were within a specific radius of a London store. The tier system introduces a further layer of complexity, and advertisers must be conscious that certain plans must be flexible given that it's difficult to anticipate where and when tier changes will occur.

In some cases, automation may be the answer. The Trade Desk have announced their COVID-19 targeting solution based on regional R ratings. Using UK Government data, which is refreshed weekly, strategies can be automatically switched on or disabled. For example, a delivery service could promote their services in regions with an R rate above 1.5, where individuals may be more likely to avoid shopping in person. Or, an alcohol brand could switch their creative to promote buying their drinks from a store rather than a pub. We shouldn't approach the tier system purely as a limitation; instead we should search for creative solutions for location targeting.

With Christmas quickly approaching, it's more important than ever to understand what consumers' lives look like right now. And how this could differ drastically from place to place. The trends seen during Christmas 2019 are likely to be considerably different this year. According to our October QT, 1 in 3 Brits are intending

to socialise in smaller groups over the festive period.

With Q4 planning in full swing, it's crucial to consider how consumers will experience this year's festive period. And to remain prepared to adapt to further tier changes.



WILL BLACK FRIDAY HAPPEN?



A year of disruption, lockdowns and tiered restrictions has led to accelerated change. The explosion of ecommerce to the detriment of bricks and mortar has meant businesses have had to pivot at speed. Coming up to what is traditionally the biggest shopping time of the year, some wonder if the annual Black Friday event will even happen.

There have been changes over the years. What started as two separate shopping days; Black Friday (offline) and Cyber Monday (online) have become one big event. Black Friday has expanded from one day to several days, from stores to online and the same deals replicated through to Cyber Monday, which has become the last day of the big sale.

Consumers have become increasingly sceptical about the discounts on offer and whether they truly offer the value that retailers claim. Consumer group Which? recently concluded that many Black Friday deals were the same price if not cheaper at other times of the year.

In response, some brands are taking a stand against this consumerism and are looking at Black Friday as an opportunity to promote greater brand purpose. Patagonia took the initiative last year and IKEA have just launched a 'timely campaign' to buy back unwanted furniture to encourage more sustainable consumerism.

Furthermore, a pandemic and a possible no-deal Brexit have brought consumer uncertainty, less disposable income for some and a virtual festive season to come.

Despite this, research suggests Black Friday on the 27th November 2020 will still be a significant shopping day. According to research, 58% of people will be spending the same if not more on gifting this holiday period (source: lightbox Pulse). And with the explosion of the £1bn self-gifting market, people will no doubt be looking to reward themselves for their continued hardships. On Black Friday alone, 50% will be spending the same or more, whilst 25% will still see it as a key shopping day as

savvy shoppers actively seek promotional offers and deals.

While the high street isn't likely to see the deal-hunting Black Friday crowds of past years, many retailers will take this opportunity to drive extra sales before the end of the year, to boost turnover and reduce stock. We might even see some of the biggest discounts ever!

Of course, this uncertainty does make it hard to predict what will actually happen. As we have become accustomed to this year, brands have to be prepared to adapt, pivot and plan for a Black Friday that will be ultra competitive online.



MINI NEWS THIS MONTH

BIM

DIG DEEPER, LOOK CLOSER, THINK BIGGER

The month of October marks Black History Month, providing an opportunity to recognise the contributions that people of African and Caribbean backgrounds have made to the UK over many generations. The month is honoured through various events, including exhibitions, zoom talks, documentaries, film releases and much more. The focus is on celebration and education of black heritage and culture, as well as the effects of racism and how to challenge negative stereotypes.

Pinterest has recently released a new opportunity within its advertising offering, adding e-commerce features ahead of Christmas shopping season. Ads will now be incorporated into more shopping experiences across the platform, within the most highly visible places to shop: Lens search in Pins, the shop tabs in search, and shopping on Pins. UK Pinners will be able to shop within the platform and gain inspiration from Shopping spotlights (selected, shoppable content curated with publishers and creators).



Facebook has announced that the platform will ban political ads following the US presidential election. A blog post read “We plan to temporarily stop running all social issue, electoral or political ads in the US after the polls close on 3 November, to reduce opportunities for confusion or abuse”. This follows a statement made in September whereby Facebook said it would not accept any new political ad campaigns the week prior to the vote. With no timeline given for lifting the ad ban Facebook has promised that the changes are intended to ‘reduce opportunities for confusion or abuse’.

