



June 2021



## CINEMA IS BACK

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Monday 17th May brought with it hotly anticipated freedom for the UK; being able to hug your family, sit inside at a restaurant, and finally visit the big screen. Cinema visits were the third most missed activity (Metrix Labs) throughout the pandemic, ranking higher than visiting a pub or returning to the gym.

Prior to the first lockdown in March 2020, visits to the cinema were a popular leisure activity, with 41% of UK adults visiting at least once a month (Verizon Media), ranging from family visits to midweek date nights. The channel allows brands to reach audiences when they are most receptive to advertising and “feeling their most positive” (IPA Touchpoints).

In recent years, cinema has been particularly strong for reaching a young, affluent audience. 500,000 of these traditionally light TV viewers (16-34s) enthusiastically returned to watch Christopher Nolan’s *Tenet* during the brief period cinemas reopened in summer 2020.

2019 saw the second highest admissions in over 50 years, with the UK box office raking in over £1.25bn for the third year running. Fast forward to 2021, and we’re living in a climate of mask wearing and social distancing – not the typical image of a carefree cinema visit.

From research gathered before the start of lockdown-easing in May, 75% of the UK had already planned their return, with 60% of people expecting to visit the cinema within two months of reopening (Metrix Labs). This is largely due to a particularly strong 2021 slate, with the inclusion of eagerly awaited blockbusters, the biggest being: *No Time To Die* (Bond franchise, September) – having been pushed back multiple times since the original launch date of April 2020.

Audiences have flocked back to cinemas since reopening on the 17th May, with admissions eclipsing original forecasts. For example, DCM reported a 129% increase over predictions for their first week. This trend is expected to continue, with weekly admissions across the summer anticipated to reach highs of 2.2m.

Although the pandemic saw a rise in direct-to-streaming releases, such as Disney’s *Mulan*, which was released exclusively on Disney+, recent figures have shown that, now consumers have the option, the big screen is still the place to be. Disney’s latest release, *Cruella* raked in £6m during its opening week, placing it third highest for the UK box office, despite also being available for a fee on their streaming service.

With a wealth of movies still to come in the second half of the year, including *Fast and Furious 9*, Disney’s *Jungle Cruise* and Marvel’s *Eternals*, there are exciting reasons for everyone to return to the movies. It’s clear that cinema is reclaiming its place in the entertainment market and proves, if anything, that absence does make the heart grow fonder.





## THE MEASURE OF ATTENTION

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The emerging field of advertising attention measurement is hotting up fast. Advances in the ability to determine who is viewing digital and TV ads and for how long are changing the game. New ways of planning, measuring, optimising and, ultimately, trading media are evolving. Not to be mistaken with viewability (whether an ad was displayed or not), attention uses mobile eye-tracking and big-screen head tracking with large audience panels to give us insight into which ads are seen, and for how long.

This new way of thinking about media has already ruffled some feathers. One of the leading players in the space, Lumen Research, annoyed Facebook by saying that in-feed advertising should be regarded as an outdoor channel, rather than a video channel. The short bursts of attention paid to Facebook, Lumen suggests, indicate that static ads with creative like outdoor 6 sheets are most effective. Instead of inserting video in-feed, they advocate ads with snappy copy that deliver the message at a glance.

As with any new advancement in advertising, it pays to consider the full implications. Multiple studies show that people naturally pay more attention to adverts when they're in market for a product – this means that optimising plans only to attention could risk undercooking the vital role advertising plays when priming audiences with longer-term brand awareness and consideration.

There's also nuances in how to use attention dependent on the nature of your brand and its campaigns. Launches, for example, likely need more attention than a salience-driving campaign from a well-known brand. The former needs to introduce a brand and convey the proposition whereas the latter typically focuses on reinforcing existing memory structures. Naturally the former demands more of the audience and needs their eyes on screen for longer.

Ultimately, an open mind when it comes to the implications of attention is key. Discussions around 'cost per attention' measures must consider that reach will always be a big factor in effectiveness too. Instagram Stories are an attention big-hitter, but reach remains low vs Instagram in-feed ads. As always, a balanced, considered approach is needed for media planning.

the7stars has an exciting approach to attention in development that touches planning, measurement, optimisation and trading. Watch this space for news and, firstly, a whitepaper that explains all.

Oh, and the most cost-effective way of capturing attention? Good old-fashioned TV ads top the charts, proving why it's still the starting point for many brands. But YouTube is running a close second!





## PREPARING FOR A GREENER FUTURE

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While the 47<sup>th</sup> G7 Summit was being held in Cornwall, the7stars and other leading media agencies joined with the IPA to launch our industry's own effort to combat the climate crisis - the IPA Media Climate Charter.

The Charter provides tools and resources, including a new media carbon calculator, to support our transition to a zero-carbon future.

Housed on a new IPA hub: <https://ipamediaclimatecharter.co.uk/>, the Charter offers a pathway for us to demonstrate our commitment and action in response to the climate crisis.

One of the core tools on the site is the carbon calculator for media plans. This new tool will allow us to measure the overall carbon footprint of the campaigns we plan and buy across all channels, identifying where we need to reduce the climate impact of each activity.

It calculates carbon emissions associated with a media plan based on the media mix. Using a range of data sources, including DEFRA electricity emission factors, device power outputs and energy intensity, it can determine the carbon footprint of a media plan at a channel level.

The Charter addresses one of the five core areas identified by the cross-industry [Ad Net Zero](#) initiative, Point 3, to “curb emissions from media planning, buying and distribution.”

Alongside the calculator, the charter provides us with additional guidance via reports, research and recommendations to help reduce the carbon impact of our own operations and aims to advance the industry's sustainability goals through an ongoing programme of research, education and events.

IPA President Julian Douglas says: “The science is clear. We need to turn fast and hard if we are to limit global warming to 1.5 degrees and mitigate [its] worst effects.”

Douglas cites incrementalism as an enemy of sustainable progress. He calls for bold action across the sector in a unified response and transition to charter standards and recognises that we cannot succeed by acting in isolation: “We need fully committed industry-wide coalitions that drive the change we need to see.”

The IPA Media Climate Charter was drawn up as a response to that challenge for collective action. Douglas asserts that it sets the pathway for sustainable transformation. A range of tools and resources have been developed explicitly to empower all charter members to make genuine impact within the work of their own agency and for that impact to accumulate into collective benefit for everyone.

“Most importantly,” Douglas adds, “Climate Charter members will join a community of motivated media agencies, which together can solve problems, share lessons and inspire the 10x change that we know is required.”

If you would like to find out more about how the Charter can help with your media planning, please speak to your account team at the7stars who will be happy to help.





## CONNECTED TV – WHAT NEXT?

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It's no secret how ConnectedTV consumption has accelerated in the last year or so, with the Global Pandemic leading to a significant uptake in both penetration and time-spent watching content on the device. In the US, YouTube is the most-used digital video platform for OTT watchers, with March 2020 seeing [an 80% increase](#) in watch time year-on-year. However, the questions remaining are: how do publishers adapt their offering to make best use of this consumption, and how might agencies advise clients on the best way to utilise it for their campaigns?

Unsurprisingly, Google are leading the way in their attempts to further bridge the gap between CTV advertising and typical consumer behaviour. The imminent release of a new feature expects to make their YouTube CTV ads more shoppable. Upon the click of your TV remote, or console controller, you'll be able to send a website link or other call-to-action straight from the CTV advert you've been served, through to your mobile device. This serves to remedy the challenge of not wanting to disrupt the viewing experience, while ensuring that YouTube CTV advertising isn't seen solely as a branding platform. The new feature is strategically aligned to Google's recent push of products, such as YouTube for Action, which are designed to drive consideration and ultimately sales uplift.

Other CTV publishers are finding their consumption growing and now need to ensure they maximise their ad offering.

Samsung saw streaming overtake linear TV on their [Smart TVs in 2020](#). Samsung offers the flexibility to target users based on the programmes that they watch. As an extension of your linear TV activity, or as a way to follow a similar approach without the steep budget requirements of linear, this affords considerable advantage. However, in order to constitute more than a "portion of spend in a programmatic buy", they and other players, such as Rakuten, must answer the challenge: what can you offer that YouTube can't? To emphasise their relative merits, they must show how they can feed into a larger AV plan.

Here at the7stars, the growth of CTV fits beautifully into our established viewpoint on AV. Rather than formulating AV plans in silos across TV, BVOD, YouTube and so on, we determine our approach to video based on audience consumption. Is our audience going to care whether the advert is on demand or on linear TV? Or are they going to care that we're not delivering a 30-inch landscape video to their mobile device? Spoiler; emphatically not. CTV, and the new products being developed, support our "AV by Device" approach to planning. We look at how viewers behave and deliver assets across the screens, putting consumer experience first, and then measuring and optimising accordingly.

CTV further blurs the line between AV channels. For advertisers who are receiving recommendations that are suited to video consumption in 2021, this is only going to benefit plans once measurement catches up.





## THE ALL IN SUMMIT

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The past 14 months have been difficult for a number of reasons, but the rise of the Black Lives Matter movement last year, due to the harrowing murder of George Floyd, has led the advertising industry to take a hard look at itself and wonder whether it's doing enough about inclusivity.

Consequently, in March a survey was launched by the industry's "Inclusion Working Group" made up of the Advertising Association, ISBA, and the IPA. With 16,000 respondents, the inaugural "All In Census" survey managed to reach around 20% of the whole industry. When results were released a fortnight ago, they provided powerful reading, posing questions of whether our industry truly represents the country. The Advertising Association itself then followed up survey results with an online seminar, the "All In Summit".

During the summit we heard from disabled actors about the Maltesers campaign, launched ten years ago, which remains one of only a handful of advertising campaigns to feature disabled talent. This issue is underlined by the survey results in which disabled talent is shown to be vastly underrepresented in the industry with just 9% working in advertising vs 20% of the working age population. We heard from prominent colleagues from working class backgrounds who spoke candidly about the challenges they face in a relatively middle-class industry, and the conversational code switching that they frequently have to employ. This was backed up by findings of the All In Census which revealed that 28% of advertising professionals attended a fee-paying school (the national average is 8%). The summit touched upon recruitment as we heard about the effects of unconscious bias, with just 1% of executives being black, compared with the national average of 3%.

The session closed with an action plan, focusing upon three immediate aims:

- Improving the experience and representation of black talent
- Supporting disabled professionals and the immediate audit of websites across the industry to ensure full accessibility.
- Encouraging talent from working-class backgrounds and the uptake of the *Social Mobility Commission Toolkit*.

Inclusivity is profoundly important; not only is it the right thing to do but it also makes commercial sense. Many studies have pointed to the positivity that a diverse workplace brings to the bottom line: "the relationship between diversity and the likelihood of financial outperformance has strengthened over time" (McKinsey, 2018).

Ultimately, though, it's by our actions that we are all judged. Here at the7stars we launched our anti-racism charter last year with just a few examples below of what we have already done:

- Creating our own ethnicity pay gap investigation to identify any issues.
- Designing bespoke ally training for the whole agency.
- Changing our Foundation grant-giving strategy to include charities who are actively involved in anti-racism.

We see this very much as just the start of our journey into inclusivity, but we are emboldened by the knowledge that steps are being taken to spotlight disparity and to improve inclusivity across the industry.



## POSITIVE NEWS

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Binge watching is nothing new, but are we now becoming a nation of binge listeners? Unsurprisingly, the pandemic and home working have seen many of us reaching for a podcast to replace office chat. Companies are waking up to podcast opportunities, with Spotify and Facebook investing in hosting and players. While yearly figures for heavy listeners (those listening 10 or more times a month) increased between 2020 and 2021, light listeners (one to three times a month) are driving the overall growth, as shown in a recent [Nielsen](#) study. Finance & Tech lead the way for advertising, with KPIs like awareness outperforming other sectors.



When we were confined to our homes last year, many of us turned to our old favourite shows for comfort. Friends, which originally aired 1994 to 2004, has huge cultural significance even for those who were too young to watch it the first time. There's been speculation about a reunion since they stopped airing, but 2021 proved the perfect time to capitalise on a rise in nostalgia. The power of nostalgia means that reunion shows already have a captive audience. *Friends: The Reunion* broke records on Sky One in the UK as the network's most watched show ever with more than 5.3 million people tuning in.

After an 18-month break, viewers can finally tune in to the new series of ITV's Love Island. This year's islanders had to quarantine in Spain for two weeks ahead of entering the villa, as just one part of the Covid protocols ITV have put in place. With the outside world opening up here in the UK, it will be interesting to see whether viewers are keener to head out to the pub rather than to stay in to catch the latest gossip. The opening show of last series saw a total of 4.8m viewers watching, so we're expecting to see similarly big figures this time round.

