



# YouGov Review of Christmas adverts 2014



# YouGov asked consumers about their views of the Christmas adverts of six UK retailers

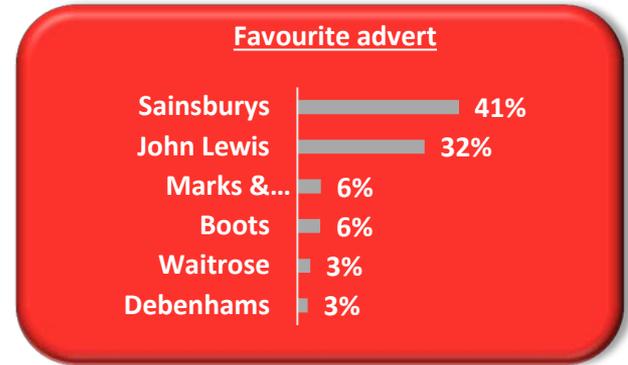
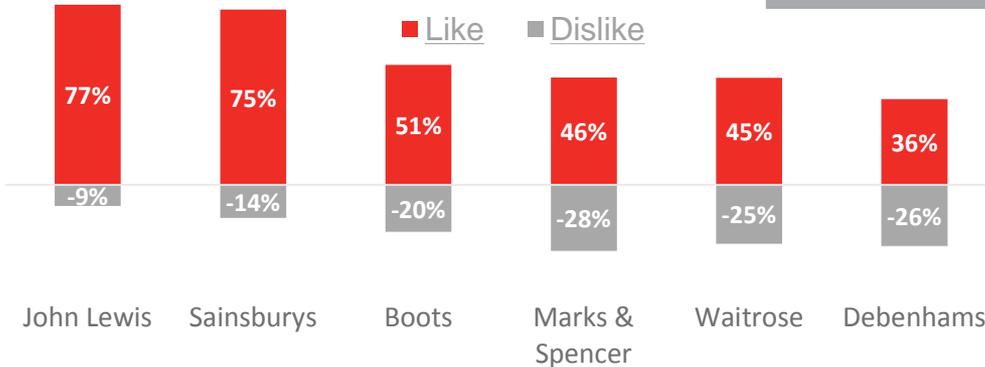


# Sainsbury's takes the top spot



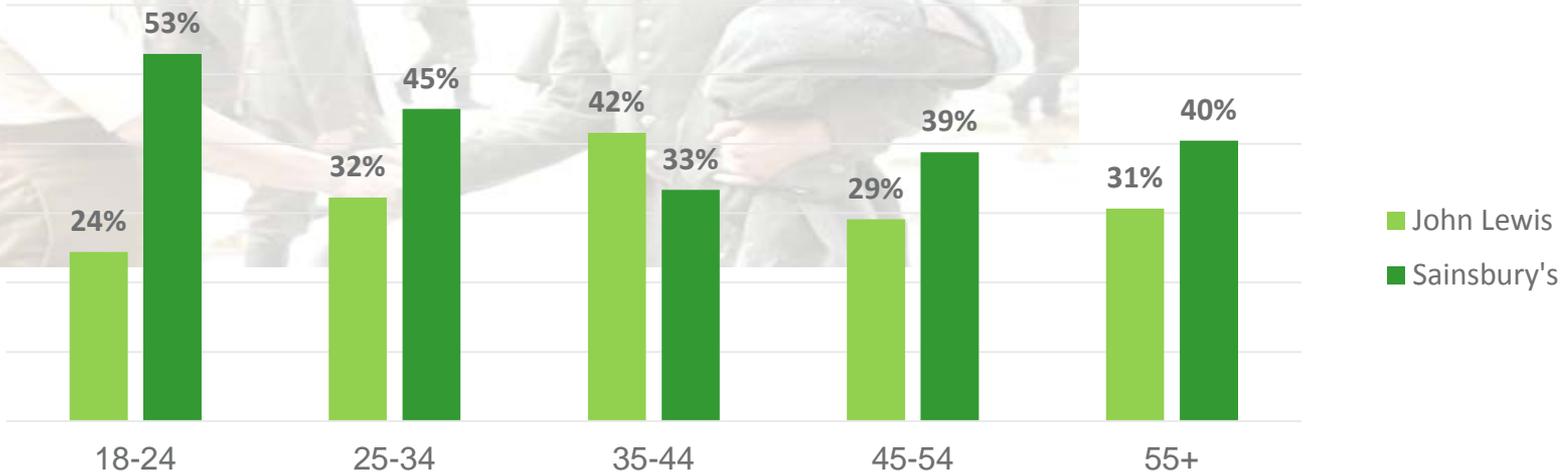
The John Lewis and Sainsbury's adverts are liked in equal measure: 3 in 4 like the John Lewis and the Sainsbury's Christmas adverts, and 1 in 2 "love" each of them respectively.

However, when asked to decide upon their favourite, Sainsbury's comes out on top, with 2 in 5 naming it their favourite of the Christmas adverts, and 1 in 3 choosing John Lewis.



# Sainsbury's is the favourite of most age groups, with the exception of 35-44 year olds who prefer Monty the Penguin.

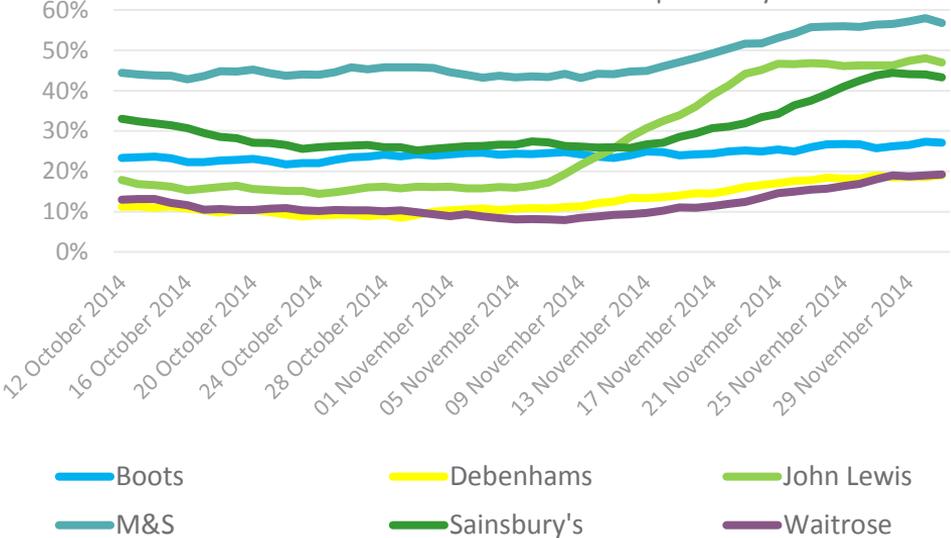
*The Sainsbury's advert appeals to a young audience:* Over half of 18 to 24 year olds picked Sainsbury's as their favourite Christmas advert of 2014.



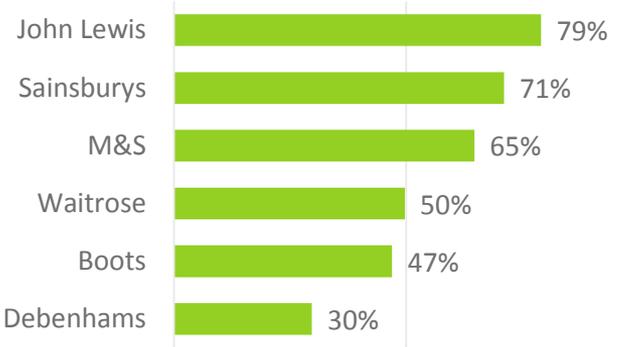
**John Lewis sees the biggest and quickest increase in ad awareness after its premiere on November 7<sup>th</sup>.** Sainsbury's sees the second highest increase, however it gathers pace more slowly – it premiered on November 12<sup>th</sup>.

### Ad awareness

- The increase in awareness of M&S took a while to increase after it premiered on November 7<sup>th</sup>
- Awareness of the Boots advert increases only slightly
- Ad awareness of Debenhams remains comparatively low



### Have you seen these ads?

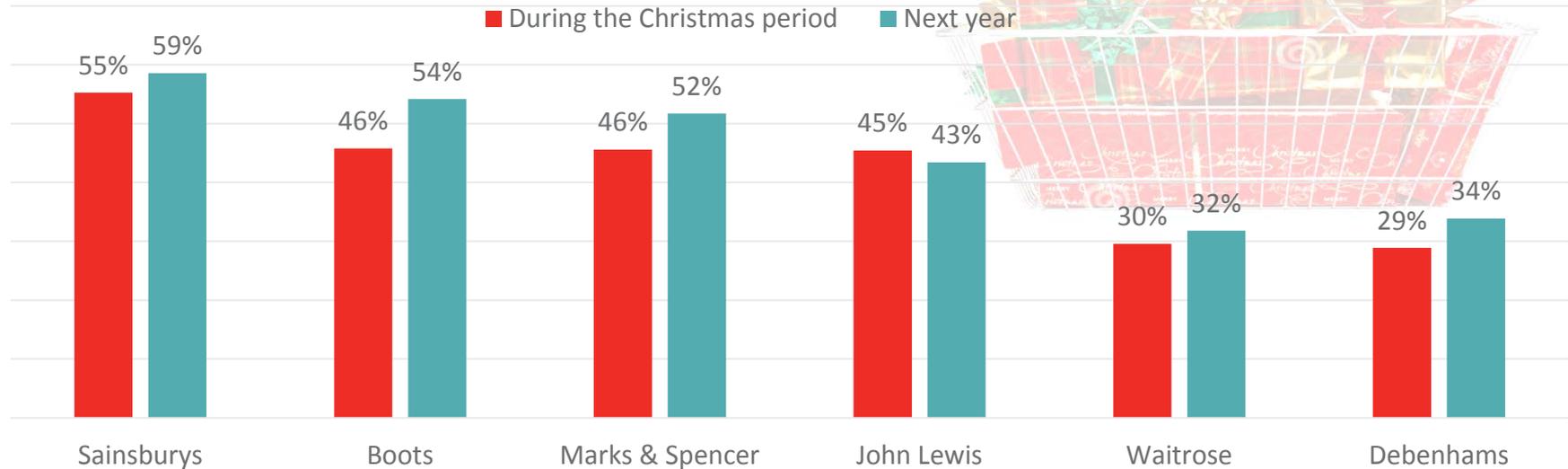


4 in 5 of UK adults claim to have seen the John Lewis advert prior to taking our survey, making it the most viewed.

# Of the brands advertised and tested, Sainsbury's is likely to see the most shoppers through its doors during the Christmas period as well as after.

Although the difference is small, John Lewis is the only store where more respondents said that they would visit the store during the Christmas period compared to 2015, demonstrating that the advertising had the desired impact for the Christmas shopping period. Given that of all six brands John Lewis is the only one to advertise on TV exclusively during Christmas, this is not hugely surprising.

## How likely, if at all, would you be to shop with each of the following...



# Found it!

Although likelihood to shop at Sainsbury's over Christmas remains high amongst those that liked the advert (1 in 3), the advert which engenders the biggest increase in shopping behaviour as a result of liking the advert is Debenhams.

1 in 2 of those that liked the advert would be likely to shop over Christmas, an increase of 22% versus the UK population. Likelihood to shop at Boots and M&S also goes up by 1 in 5 amongst those that liked the adverts respectively.

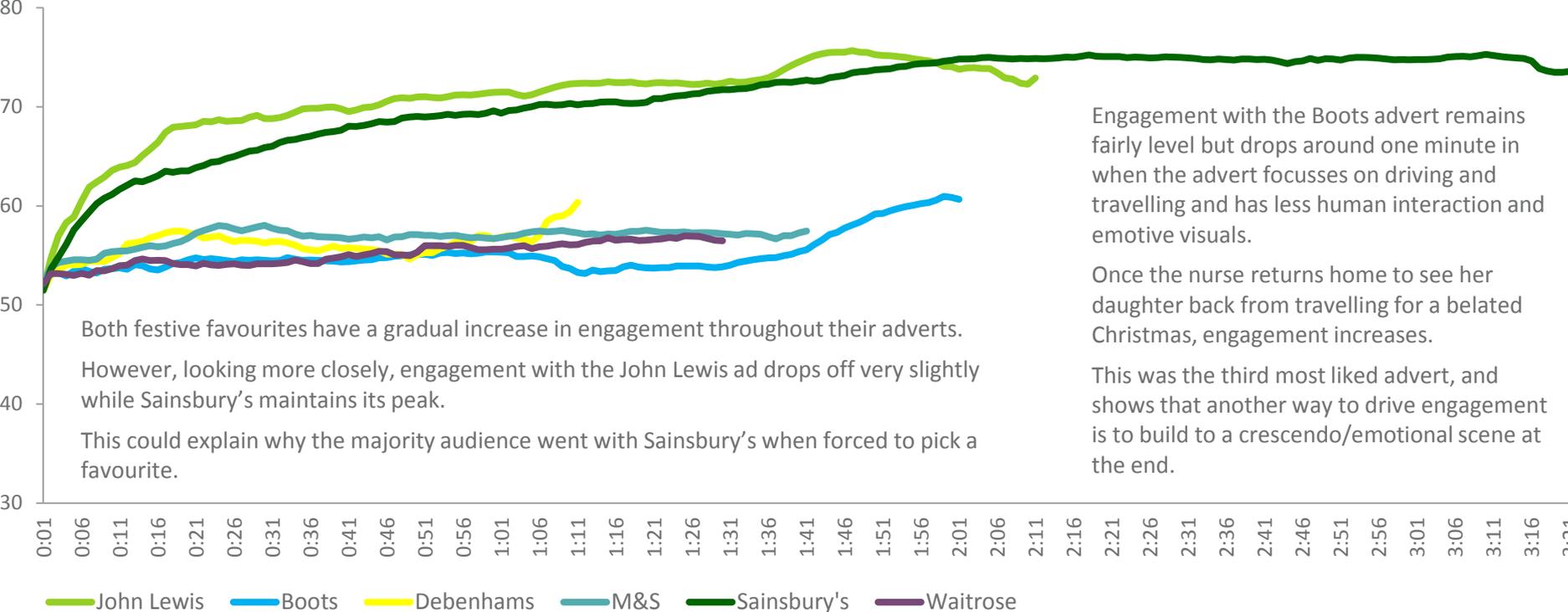


# Real-time engagement with each of the adverts...

*...a second by second trace of levels of engagement with content*



**The recipe for success is grabbing the audience’s attention in the first 20 seconds, then gradually building engagement throughout.** This is how Sainsbury’s and John Lewis have ensured their position at the top of the pile this year.



Both festive favourites have a gradual increase in engagement throughout their adverts. However, looking more closely, engagement with the John Lewis ad drops off very slightly while Sainsbury’s maintains its peak. This could explain why the majority audience went with Sainsbury’s when forced to pick a favourite.

Engagement with the Boots advert remains fairly level but drops around one minute in when the advert focusses on driving and travelling and has less human interaction and emotive visuals.

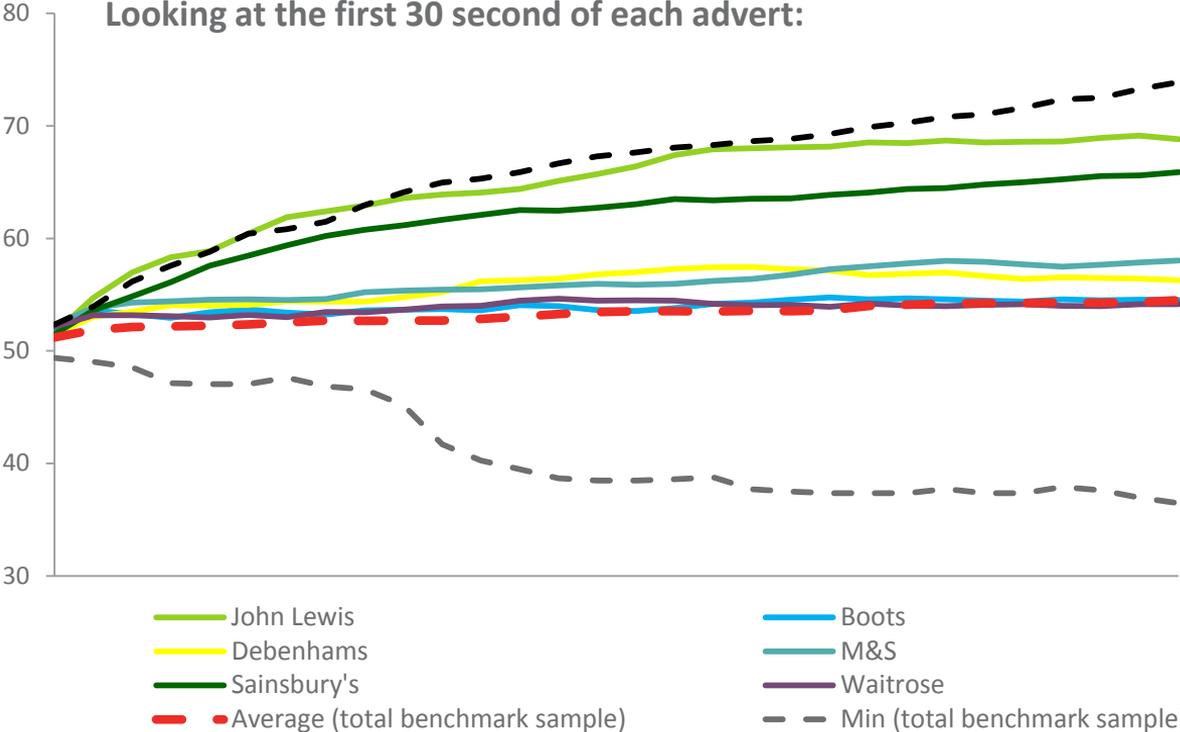
Once the nurse returns home to see her daughter back from travelling for a belated Christmas, engagement increases.

This was the third most liked advert, and shows that another way to drive engagement is to build to a crescendo/emotional scene at the end.



# Waitrose and Boots are virtually in line with the average engagement score whilst the other adverts exceed this.

Looking at the first 30 second of each advert:



Using our benchmark data we have looked at the best performing scores for an advert over time.

The John Lewis advert outperforms our previously best performing advert in the first 10 seconds and closely matches the 'best in class' line throughout the advert, whereas the Sainsbury's advert doesn't quite match the scores overall it follows a similar pattern, gradually growing in engagement throughout.

Note: the average score is taken from internally created benchmarks for adverts we have tested.

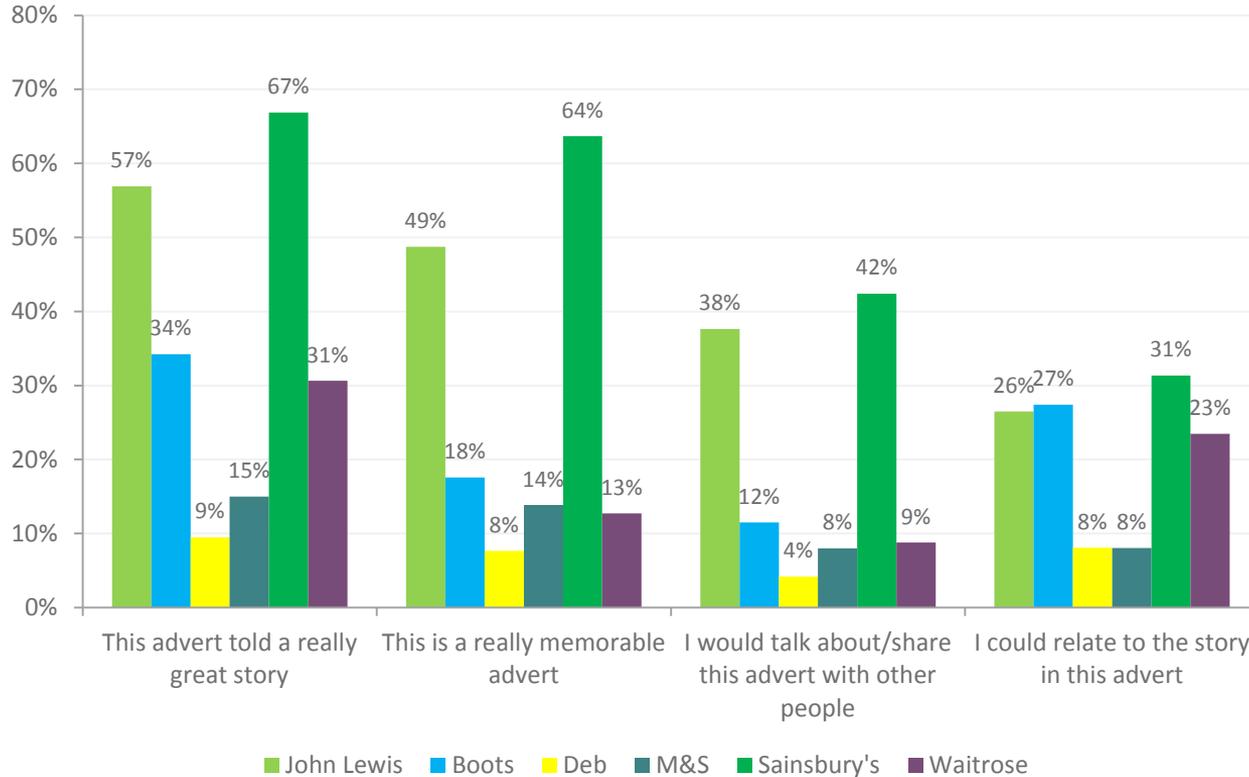
# Looking at some of the adverts in more detail

*Who are the target audiences and consumers during Christmas 2014?*



## Telling a good and memorable story is key to making a successful Christmas advert.

Which, if any of the following statements, would you associate with this advert?



The story and the memorability of the Sainsbury's advert are what really makes it stand out as the favourite for 2014.

This also means it is the most likely to create a dialogue amongst its audience and has the highest shareability.

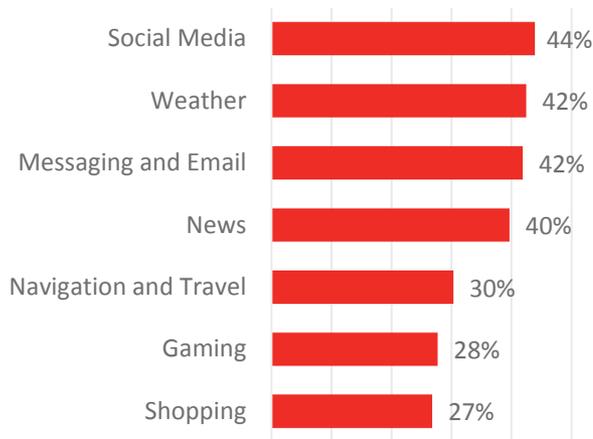


## Boots' Christmas customers shop online whilst watching TV and are more likely to use shopping apps

Boots could really benefit from getting their customers to shop online via apps this Christmas and integrating their TV and online offering

Just over 1 in 4 fans of the Boots advert who are likely to shop there at Christmas use apps for shopping.

### % using different apps



**“Kept me watching to the very end to see what would happen. Real people, not all airbrushed and perfect.”**

*“The music was perfect, the ending just as perfect and I had no idea what was coming.”*

**“Family coming together to show love/support for those who have to work at Christmas, as I have had to do many years.”**

*“Gosh, had me in tears - all for Mum! What more can I say”.*

**“A very human story which I can relate to”**

Source: YouGov survey and YouGovProfiles

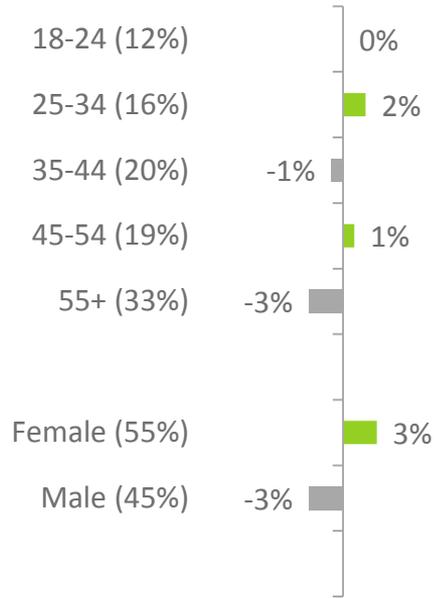
Base: Those that like the Boots advert and would be likely to shop there over Christmas 2014

Versus - Nationally Representative of 18+ UK adults: n=1017



## Despite some controversy, the Sainsbury's advert had broad appeal.

Vs. UK adult population



### The story and the truth behind it make this a winning advert:

*"Coming from a military background, I love that this advert brought to attention the true human kindness of people on that day. Lots of people didn't know that it was a true story. Love that it was done with the British Legion."*

*"It was about the true meaning of Christmas - goodwill to mankind, being kind to strangers. It was so nice not to have brash consumerism rammed down your throat but an advert that truly captured the spirit of Christmas using a real historical event. It really makes you think"*

*"I truly love this ad, my grandfather died in the 1st world war aged 28, so this ad always makes me think of him, god bless them all."*







## The Debenhams advert is well targeted.

**It's all about the kids...or wanting to be one!**

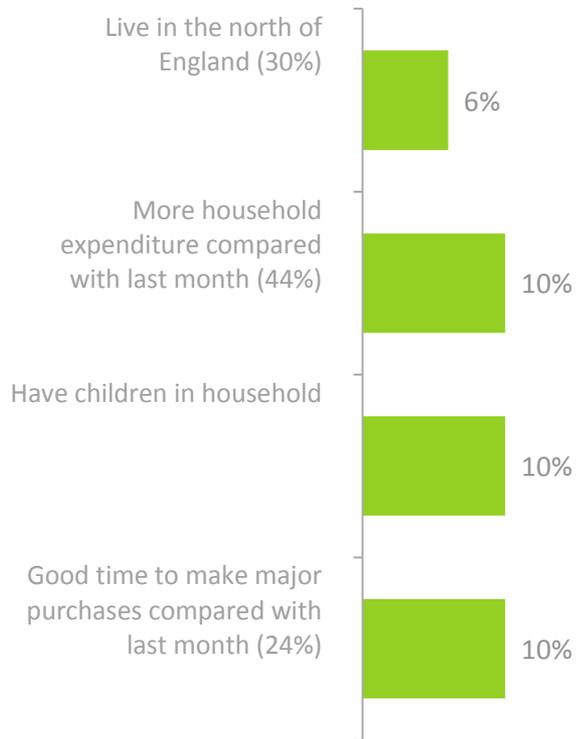
*"Exploring a store is something everyone has wanted to do"*

**"The children and their faces when they are looking are lovely, good reminder of what Christmas is like for children"**

*"Christmas is about children so its good to see them having fun and looking for presents"*

**"I liked that the advert took you into the store and I felt I was going shopping."**

### Vs. UK adult population



Those that like the advert and are likely to shop there over Christmas are more likely to have children in their household.

They are spending more than they were a month ago and see it is a good time to make major purchases. They also enjoy shopping in their spare time

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Source: YouGov survey and YouGovProfiles

Base: Those that like the Debenhams advert and would be likely to shop there over Christmas 2014

Versus - Nationally Representative of 18+ UK adults: n=1017





## Waitrose works in the South

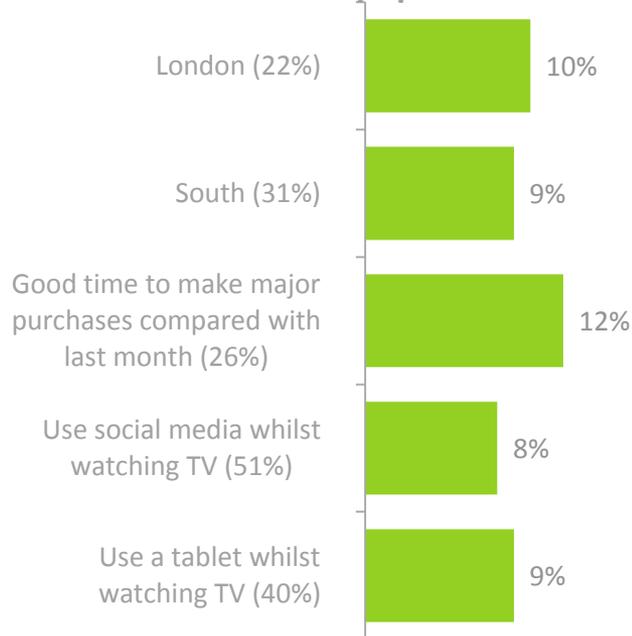
The little girl is a big part of what people like about this advert, and her story...

**“The main character is really likeable, overcoming her fears.”**

*“The struggle of the little girl and the dedication to make Christmas mean something. this really touched my heart! “*

**“Story wasn't immediately obvious - wanted to see how it would end. Satisfying and unexpected ending. Non-materialistic.”**

### Vs. UK adult population



The Waitrose advert appeals to, and is most likely to encourage shopping over Christmas amongst, residents of the South-east who are willing to make major purchases during the season but do not need to make massive sacrifices to their usual expenditure.

They are avid social media users whilst watching TV, so it is important for Waitrose to have a social media strategy that will appeal to this market, and also one that ties in with their TV advertising campaign.

Source: YouGov survey and YouGovProfiles

Base: Those that like the Waitrose advert and would be likely to shop there over Christmas 2014

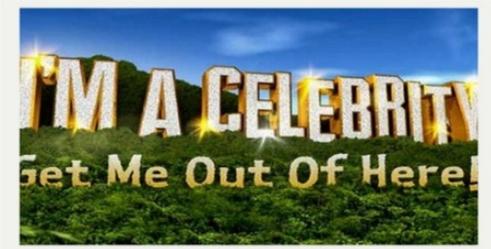
Versus - Nationally Representative of 18+ UK adults: n=1017

# Which TV slot is worth a lot?

*What do those that liked the advert and would be likely to shop with each brand watch on TV?*



**ITV is the place to advertise at Christmas:** amongst those that like each advert and would be likely to shop with the brand over Christmas, it is ITV reality shows and soaps that gain the highest audience.

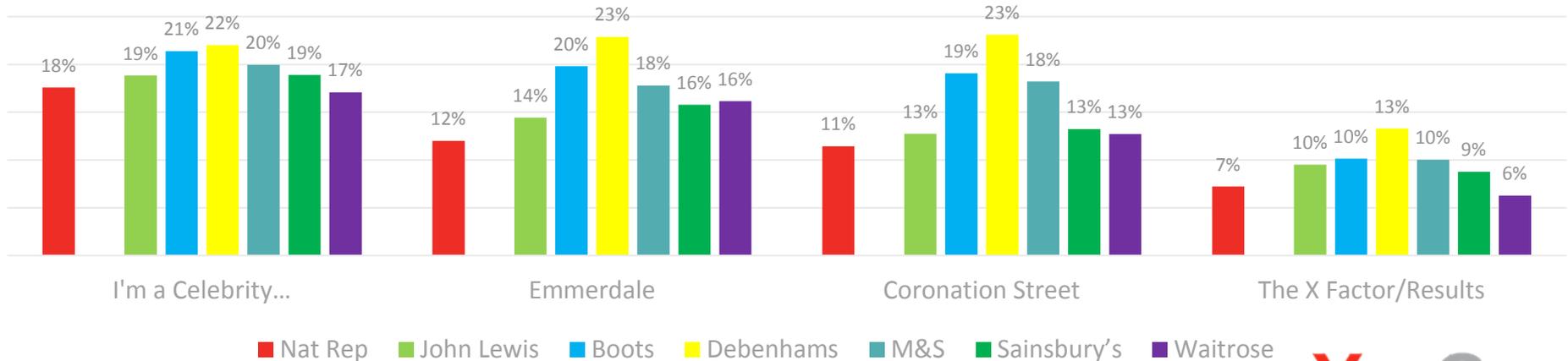


*"I'm a Celebrity..." was the most watched for fans of all adverts*



*Emmerdale and Corrie are also popular amongst all groups*

Top programmes watched (excluding BBC): % of watched each programme (from November 1<sup>st</sup> 2014)



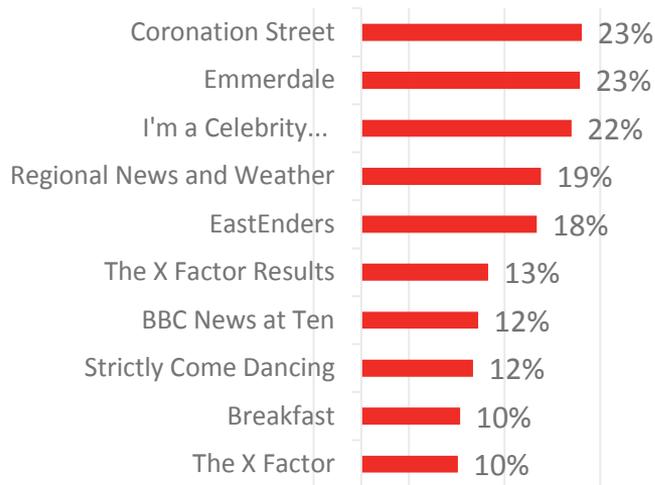


## Debenhams: what are they watching?



Coronation Street and Emmerdale are the most popular programmes amongst this audience of potential Christmas shoppers

### Top 10 (incl. BBC)



The Debenhams advert premiered during Saturday night X Factor on 8<sup>th</sup> November



But looking at the data, the **X Factor Results show** would have been a better place to air the advert than the Saturday night show, as the former gained a higher % of viewers

YouGov

## Summary

- John Lewis and Sainsbury's are the most liked in equal measure, but when asked to pick their favourite Sainsbury's come out on top
- Sainsbury's is the favourite of most age groups, appealing most of all to the 18-24s, half (53%) of which choose it as their favourite
- Of the brands advertised and tested, Sainsbury's is likely to see the most shoppers through its doors during the Christmas period as well as after
- Looking at the second by second engagement with the adverts, the recipe for success is grabbing the audience's attention in the first 20 seconds, then gradually building engagement throughout - this is how Sainsbury's and John Lewis have ensured their position at the top of the pile this year
- Telling a good and memorable story is key to making a successful Christmas advert. The story and the memorability of the Sainsbury's advert are what really makes it stand out as the favourite for 2014
- ITV is the place to advertise at Christmas: amongst those that like each advert and would be likely to shop with the brand over Christmas, it is ITV reality shows and soaps that gain the highest audience

## Further Information



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