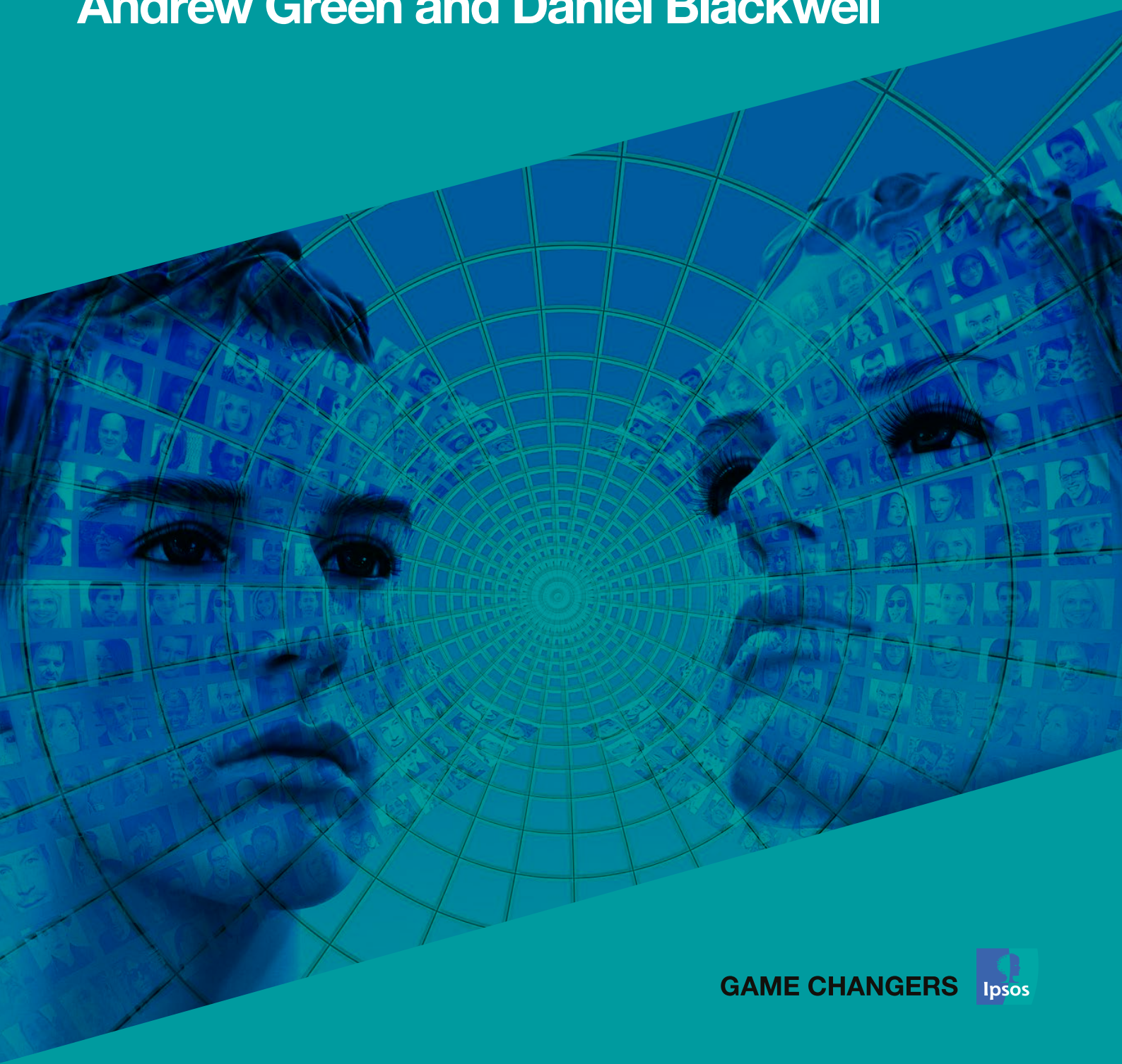


Confessions of the Admen

Andrew Green and Daniel Blackwell



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“Now, what I want is Facts... Facts alone are wanted in life. Plant nothing else, and root out everything else. You can only form the minds of reasoning animals upon Facts.”

Charles Dickens: *Hard Times*

Overview

- In all walks of life and throughout history, people have projected their own worldview onto their surroundings to help better understand it: we also tend to use mental short-cuts (heuristics) to help us make decisions, but these can often be misinformed and ill-judged.
- Our own *Perils of Perception* studies show that around the world we readily use stereotypes and biases to form opinions. On topics ranging from obesity, internet penetration to immigration, it seems that we are quite incapable of estimating the state of our own nations!
- People working at advertisers, at creative agencies and at media agencies are responsible for making multimillion dollar decisions about where money should be invested.. They tend to be younger, more urban and more digitally-savvy than the population as a whole. They think about media and behave differently from the rest of the population.
- As well as thinking and behaving differently from other people, they also seem to project their own behaviours onto that of others when asked how they think other people behave. For example, they believe that the UK population spends only half of its viewing time *watching television programmes live* – when the true figure is 87%. And they predict that more than a third of TV viewing is on devices *other than a television set* – when the figure is in fact just 2%.

It's not all about you...

One of the first lessons a budding market researcher is taught is *not* to project their own behaviour and attitudes onto those of others. In other words, the ‘sample of one’ fallacy. It's not always an easy rule to follow: we naturally draw on our own experiences and opinions when we are designing questionnaires or analysing results.

But it is important to let the data speak for itself as far as possible, to listen rather than to opine and to try and truly understand what the people we are talking to are thinking and doing.

A study by Accenture in 2011 found that 23% of senior managers they spoke to described personal experience as ‘very important’ when making decisions about their customer needs. A similar number preferred to rely on ‘simple’ data and facts, while 17% credited more complex data analysis. Five years on, there is of course far more data available to make decisions. But people's own preferences and prejudices undoubtedly come into play when sifting and interpreting these data.

‘Déformation professionnelle’ describes the tendency to perceive the world through the point of view of your own profession. Take an architect, for example: when they look at a building, they see a structure and appreciate its form and lines. To the layperson, whilst they may like or dislike the building, they just see a building. One could say the same of photographers or film-makers: they will look at photographs and films differently to non-professionals.

The question is: *do media planners and buyers see the world as others do, and does it affect the decisions they make?*

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The Perils of Perception

Ipsos has previously fielded research which compares what people think is true and compared it to reality. The study, *Perils of Perception*, ran in 33 countries in 2015 and 40 in 2016. To pick just a few examples, we found that:

- When asked about the proportion of wealth held by the top 1% of households, UK respondents believed the number to be around 59%. The reality is just 23%.
- US participants told us they thought half the population were obese or overweight; the actual proportion is two-thirds.
- When asked about the share of immigrants in the population, the perception in France was that it was just over a quarter – compared to the real figure of just 12%.
- Chinese respondents, when asked about the proportion of people likely to have access at home to the internet, thought the figure to be around 72%. In fact, less than half do.
- People in Russia think their country's population in 2050 will be 160 million – rather higher than the UN's projection of 129 million.

In other words, there is a clear gap between perception and reality on many topics. The gaps vary by individual and certain patterns emerge between countries, where the gaps are greater for some topics than they are in others.

There are many reasons why such gaps can arise: it could be the company we keep, the news sources we consult and much else besides. *Déformation professionnelle* can also be a reason why perception and reality can differ.

In the advertising and marketing business, there has been a strong push in recent years towards preparing for a world where people are spending more and more time online via their PCs, smartphones and tablets and carrying out a growing number of transactions on them. Advertisers need to place messages where their customers and potential customers will see them and know that they need to embrace the digital world. Few media agency mission statements do not include words like 'digital-first', 'mobile-first' or 'programmatic.'

But is the perception running ahead of the reality?

There can be no doubt that this trend is a real one. The average US or UK adult spends more than 3 hours every day online compared to perhaps 20-30 minutes reading printed newspapers and magazines.



Image: Flickr user: CiaoHo

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But averages can hide great variability. Young urban sophisticates are far more digitally and mobile-savvy than, say, older rural retirees. And this can be a problem if these same urban sophisticates are making decisions about how best to reach potential consumers for a wide variety of goods and services.

Two recent UK studies suggest that people making decisions on how advertising budgets should be allocated sit at the extreme end of the spectrum on media usage.

The London Media Planner

In July 2016, Newsworks, the UK marketing body for national newspapers, asked a small group of media planners and media managers to keep an electronic diary of their activities – including the media they consumed – over a one-week period.

It was based on the same method used by the familiar IPA *Touchpoints* studies and designed as a snapshot of media behaviour from this very influential group of people, rather than as a representative sample projectable to a larger population.

These were people who, responsible as they are for many millions of pounds of advertising placement decisions, might be expected to be particularly heavy media users of all types. But this is not the case.

AMONGST THE FINDINGS:

- London-based media planners claimed to watch 40% less television than the average adult. Media managers say they watch only one third as much.
- Almost one third of media planners' viewing is to (largely commercial-free) Netflix, compared to just 10% for young adults outside London (actual observed data is not available).
- Media professionals spend about half as much time as the average adult reading printed newspapers. They also spend less time reading newsbrands online.
- Email usage amongst media professionals was close to double that of the average adult.

In other words, media professionals are not like other people. Managers especially seem to have very low levels of usage compared to the rest of the population.

Thinkbox

The findings of this study were echoed in a larger survey Ipsos Connect ran recently for Thinkbox, the UK marketing organisation for commercial television. Again we were looking to test whether *déformation professionnelle* existed in the advertising industry – were people working in the profession somehow projecting their own worldview onto the rest of the world – a world they were helping their clients to communicate with?

We spoke to people working in media, creative and digital agencies, as well as to advertisers themselves. Do the people designing, planning and creating advertising have similar media habits and perceptions of advertising as the British public? More importantly, do they understand how they behave, think and feel?

Differences between 'ad people' and the British public extend past the obvious demographic factors such as age and where they live. Ad people are more active on online services and websites including Netflix, BuzzFeed and social media sites. They also claim to use more devices to watch TV than the British public – for example via their tablets, laptops and smartphones.

When it comes to estimating their media behaviour and opinions, we compared the industry perspective of the British public to BARB and *Touchpoints* data to reveal that ad people do indeed fall into the *déformation professionnelle* trap: they think that people engage with media and care about advertising much more than they really do.

FOR EXAMPLE:

- When asked what share of viewing they thought the population as a whole devoted to live viewing (as opposed to catch-up and on-demand programming from the main broadcasters) the average prediction from the ad industry was 49% (which was not far different from what people

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thought themselves). But the reality is that live viewing accounts for 87% of the total.

- Advertising professionals were also wide of the mark in predicting that 37% of viewing takes place on devices other than a TV set. The true number is around 2%.
- Practitioners estimated that YouTube was watched on average for 62 minutes a day per person. The actual figure is just 16 minutes!
- Staying with the general assumption of the ubiquity and constant presence of digital devices in people's lives, industry pundits assumed that half of all viewing would be accompanied by multi-screening (checking phones and other devices while in front of the television set). Official data from *Touchpoints* suggest the figure is closer to 19%.



Conclusions

- People working in media agencies and in advertiser marketing departments are responsible for helping advertisers to make decisions on where best to allocate their budgets. To do this well, they need a good understanding of their clients' needs and of the relative strengths and weaknesses of the media options available.
- It might be assumed that this would make them heavier than average consumers of all forms of media. In fact, data from both a small-scale diary study and a larger online recall study suggest the opposite: media and advertising professionals are lighter than average viewers of commercial TV and readers of printed publications.
- They are, on the other hand, much heavier users of social media and many newer, digital forms of television. In short, their behaviours are quite different from the people they are likely to be targeting their advertising at.
- It is certainly hard to estimate the 'correct' share of budgets that should be going to each medium on a macro level.

Many factors come into play, including reach, the time spent using each medium, the level of multi-tasking, the creative fit of a medium and message, the cost and much more.

- Advertising on the internet and mobile will overtake television in 2017 to become the world's largest medium. This increase in spending has accompanied massive growth in the reach and time spent with digital media.
- But in looking at all the influences driving digital media spending forward, what is the importance – if any – of the behaviour and attitudes of the people making media allocation decisions? Are they investing ahead of real changes in people's behaviour, or merely keeping up with them? Certainly, those working in and around the advertising business need to ensure that they continue to look carefully at the data available on media habits to ensure they understand how people outside their media bubble are behaving.

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Ipsos Connect is a global specialised business to co-ordinate Ipsos services in the domains of Brand Communications, Advertising and Media. As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalised, Ipsos is helping clients better embrace this modern complexity with investment in new approaches and products that will fit with the digital age. Ipsos Connect aims to be the preferred global partner for companies to measure and amplify how media, brands and consumers connect through compelling content, great communication and relevant media planning.

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