



KANTAR

Creative Guardrails

Driving sales effect as the
COVID-19 pandemic continues

Volume 3

December 2020

It's not about stocking up on
mac 'n' cheese and hand
sanitizer anymore.

We've moved beyond that.

There are new,
emerging needs.



Connectivity



Mobility



Financial
Stability



Escape

So let's learn how different approaches are impacting short-term sales potential in the face of consumers' everyday uncertainty.

We tested 45 commercials
across four diverse categories
to find out.



Travel



Automotive



Financial
Services



Telco

Our findings prescribe an approach that's **short, sweet, and to the point.**

Short, sweet, and to the point.

Reflect our shared reality (explicitly or implicitly):

- Ads that mirror today's new needs and emotions perform well whether they mention COVID-19 or not. So do old and/or re-purposed creative that highlight pre-COVID needs that are now more acute.
- Messaging regarding worst-case scenarios, such as needing an emergency fund or potential job loss, achieve lower results.



Short, sweet, and to the point.

Underpin messaging with hope:

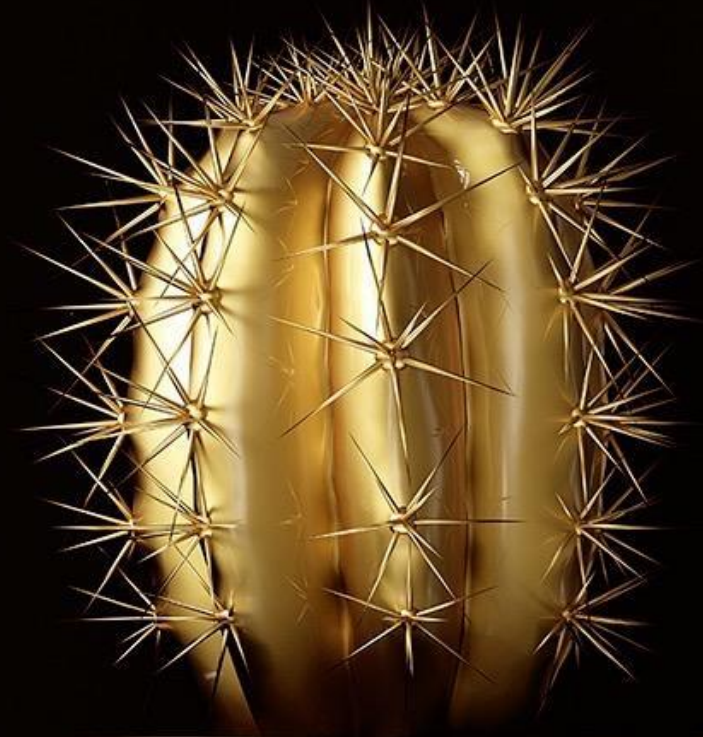
- Optimistic messaging such as “we can get through this” scores well. Conversely, promises borne out of apocalyptic scenarios are underperforming.



Short, sweet, and to the point.

Show what you can do for consumers – clearly and concretely:

- Ads with messaging that clearly communicate how brands help consumers outperform ones that focus on emotional pleas, product attributes or features.
- Hit the one, clear benefit; show people convenience, save them money, entertain them or provide a view into a post-COVID world they want to relate to.



We also uncovered
rich learnings that
apply within each of the
four categories.

A man in a dark suit and glasses is sitting in a blue airplane seat, reading a magazine. The cabin is dimly lit with blue ambient lighting. Other seats and windows are visible in the background.

Travel

Category summary:

Cruise Ships, Destinations, Resorts, Aggregators, Airlines

Brands studied:

Antigua Barbuda, Beaches, Bermuda, Expedia, Hotels.com, PGA Tour Events, Royal Caribbean, Southwest Airlines, Viking

Show a future like the past

As a category, travel ads scored high on short-term sales impacts – higher than categories that are more easily consumed in a pandemic. This corroborates what we've learned in our Pulse surveys - that there is a **strong emotional desire to get back to traveling** when people are practically and financially able.

- Royal Caribbean ads, which promise a back-to-normal experience in 2021, performed well across both brand and sales metrics.
- Ads that featured people traveling as they had before, without masks and enjoying themselves in large groups, performed especially well [+25%Δ short-term sales effect versus category average]. This is consistent with travel being a universal marker for getting back to normal.



Get to the deal

All categories demonstrated uplift in short-term sales effect as a result of modest offers, but the **travel sector is unique in that deep discounts are necessary to succeed.**

- Ads for Turks and Caicos, Royal Caribbean and Bermuda that featured deep discounts paired with pre-COVID imagery and messaging performed extremely well. [+65% enjoyment, impact, brand difference versus category average]. While recent reports suggest that the travel industry will contract, messaging focused on compelling deals will increase and convert consumer demand to get away.
- Conversely, a cruise ad that leaned heavily into luxury in both tone and features performed poorly across key measures.

Turks and Caicos “Turks and Caicos Beaches”



Bermuda “Year-Round Tennis Dreamt”



Don't dwell on 2020 being bad

As in other categories, dwelling on how terrible our current situation is, as opposed to **reflecting the trials we face and solving them**, didn't perform well. Neither did a compromised version of travel.

- An ad that dwelled on how bad 2020 has been tested poorly across metrics. The ad portrayed a host of issues yet only presented a solution to cancel travel if needed. The ad also referenced outdated topics such as toilet paper shortages and the absence of live sporting events.
- Ads that displayed social distancing achieved lower short-term sales effect [-14%Δ versus category average]. Equally, ads dismissing 2020 entirely for being a bad year didn't work either [-5%Δ short-term sales effect versus category average].
- Ads that performed well **showcased uncompromised travel**.



Automotive

Category summary:

Automakers Tier-One (national advertising), Automakers Tier-Two (regional advertising generally promotional) Rideshare, Car Buying Sites/Apps

Brands studied:

BMW, Buick, CarMax, Chevrolet, Ford, Honda, Hyundai, Infiniti, Jeep, Lyft, Mazda, Nissan, Ram, Subaru, Uber, VW

Present practical solutions

Mobility brands pursued a broad range of strategies; creative that focused on **convenience outperformed other messages.**

On-demand ride apps

Ads in this category achieved the highest short-term sales effect scores. While purely emotional ads didn't perform well in other high-consideration categories, this approach did score well here.

Auto-buying sites

The pandemic has impacted two prevailing factors in the car buying experience – convenience and dealerships. Ad creative that showed consumers they could avoid dealers and streamline their purchases scored well.

Tier Two OEM ads

Tier Two ads consistently showcased financial incentives and other offers to quickly engage and convert demand; these creatives scored higher on short-term sales effect versus Tier One ads from OEMs.

[+20%Δ short-term sales effect]

Tier One OEM ads

Tier One ads underperformed other sector ads on short-term sales effect. Auto OEMs face difficult choices whether to allocate advertising and incentive investments based on their short-term or long-term priorities. Short-term sales entails directing advertising support to Tier Two.

HIGHER SHORT-TERM SALES EFFECT



LOWER SHORT-TERM SALES EFFECT

Note, this sorting by short-term sales effect did not happen in Telco or Financial Services which also had a diversity of product offerings.

Purely emotional ads don't work; neither do negative ones.

Within the sector, brands employed a broad range of emotional pleas including COVID recovery, youth baseball and of course pets, to resonate with consumers' emotions.

Across the ads we analyzed, emotional balance is nuanced. Advertising that was purely emotional in order to pull on people's heartstrings (similar to much of the advertising at the beginning of COVID) didn't work as effectively as ads that combined pragmatism in their messaging [-10 to -18%Δ short-term sales effect for emotional pandering versus category average].

Ads that showed consumers they could return their new vehicle if they lost their job due to COVID did not do well despite being an effective technique in the financial crisis of 2018.

Tell a simple, focused story well.

Ads that tried to tell **overly complex stories or that showcased disconnected multiple features did poorly**. Ads that conveyed simple, singular messages creatively achieved high scores.

- Nissan’s “Refuse to Compromise” successfully focused on a single message – the Nissan Sentra isn’t a compromise; you don’t sacrifice for price. Impressively, the ad did reference multiple features including excellent handling, rear automatic braking, safety, and price, but cleverly weaved them all into a single consumer benefit. [+10% Δ short-term sales effect versus category average].
- Volkswagen’s “The Accountant Part 1” simple, relevant message that buying a Volkswagen was a financially responsible decision that felt extravagant also performed well [+10% Δ brand power versus category average].

These two ads both leaned on **financial responsibility, without having to sacrifice**.

Nissan “Refuse to Compromise”



VW “The Accountant Part I”



Excessive where it matters

Financial Services

Category summary:

Banks, Card Issuers, Funds, Apps

Brands studied:

Mastercard, American Express, Capital Group, Capital One, Digit, Discover Card, JP Morgan Chase, Northwestern Mutual, Rocket Mortgage, Truist, US Bank, Wells Fargo



Creatively sell a single, tangible benefit

The best performing ads in this category conveyed a single, simple benefit in a creative way. Benefits that worked well ranged from no annual fee, to convenience, to points and pre-approval.

The benefit **doesn't need to be sexy.**

- MasterCard's "A Time of Promise" showcased an American Airlines card that earns miles. The ad started with the ways we're making do with replacements for travel while quarantined, and then showed the joy of travel when we can get back to it. The ad led the category in impact and enjoyment as well as short-term sales effect [+15% Δ short-term sales effect versus average].
- Rocket Mortgage's "Queen" showed how its pre-approval process allows buyers to compete with cash buyers. It told the story of how "queens" can compete with cash which is "king" in a way that appeals not only to women, but also anyone with an underdog spirit [+5% Δ short-term sales effect versus average].

Mastercard "A Time of Promise"



Rocket Mortgage "Queen"



Community benefits aren't motivating spending behaviors

Ads that convey the concept of communities have tested well in the past, but the new slate of ads **aren't motivating near-term spending behaviors**. This is a shift from the outset of the pandemic when many ads outperformed.

- Messaging that asked consumers to support local businesses (based on their relationships with owners and/or employees) did not drive short-term sales effect, and also scored weaker on branding, impact and enjoyment [-5% Δ short-term sales effect].
- A retail bank ad that featured how it is helping to fight hunger in its communities during the pandemic underperformed other ads in the category. Performance was also impacted by complicated messaging about the details of the overall program.

Don't focus on negative eventualities or circumstances

Ads featuring negative eventualities scored poorly, and this was especially pronounced in financial services. Messaging that provided tangible benefits to challenges exacerbated by the pandemic performed well; however, **messaging that conjured how bad it could get underperformed**.

- A fund group ad referenced its experience navigating multiple bear markets and showed an anxious-looking woman looking at her laptop; this negated the abstract promises of “experience” and “can help” and the ad scored poorly across metrics.
- An app ad that helps people save featured a woman who lost her job and messaged uncertainty scored poorly across the board [-7% Δ brand power versus category average].



Telco

A woman with short brown hair, wearing a white hooded raincoat, is looking down at her smartphone. She is standing outdoors at night, with blurred city lights in the background. The scene is lit with a mix of warm orange and cool blue tones.

Category summary:

ISPs, B2B, Hardware Manufacturers, Wireless Carriers

Brands studied:

Amazon Web Services, Apple, AT&T, Boost, Mint Mobile, Samsung, Spectrum, Verizon, Xfinity

Tout benefits, not attributes

Ads with abstract messaging did not score well. Our analysis shows that people want solutions that **provide actual personal benefits, versus attributes where they need to do the math to apply to their lives.**

- A wireless provider ad that featured how customers could choose their own benefits – 5G, pay-as-you-go, or savings – scored poorly across all metrics; it required people to calculate the relative value of attributes [-10% Δ short-term sales effect versus rival].
- Another wireless provider ad scored poorly because it featured engineers describing their 5G network with abstract attributes such as “select cities” and comparisons to an “eight lane highway.” This messaging obscured real consumer benefits [-15% Δ brand power versus rival].

Telco can be especially relevant now

Many telco ads scored above pre-COVID norms, highlighting that communications is increasingly important for consumers, which will in turn benefit brands who get their messaging right.

- An ad for AT&T which showed how 5G can be subtly shifted from an attribute to a benefit achieved a high category score. The ad showed an AT&T employee explaining 5G to a customer. While speed, reliability, security and nationwide coverage are abstract features, they are successfully delivered in a more relatable conversation format, versus speaking direct to camera [+24% Δ short-term sales effect].
- Spectrum’s high-performing “Pretend” ad singularly focused on how Sports are especially relevant in the boredom of quarantine [+26% Δ short-term sales effect].

Both ads used a light-hearted approach and stayed close to their brand’s established positioning.

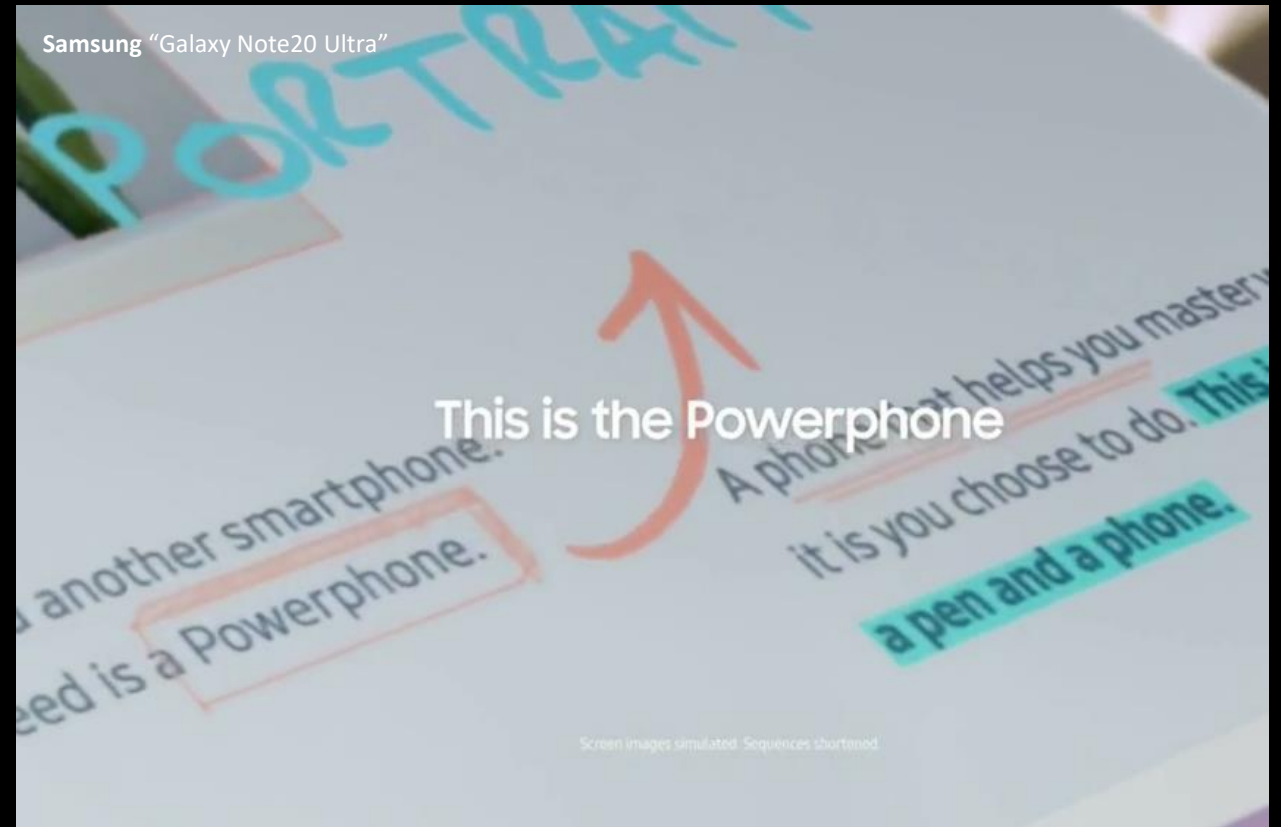


Focus on what is central to your product

Focusing on points of difference is a mainstay of consumer electronics marketing; and **demonstrating uniquely positive user experiences with devices or services is critical**. Ads that clearly communicated their core product values outperformed.

- Samsung’s Galaxy Note20 Ultra ad delivers a straightforward demonstration of productivity and gaming. This approach scored well, besting all other device ads that we tested [+30% Δ short-term sales effect versus rival].
- A different handset ad relied on a message that attempted to differentiate it from other devices in the market. This approach resulted in average scores for most metrics, and significantly underperformed on short-term sales effect.

Consumers value understanding the core capabilities of the product, and what need it fulfills (even if parity with alternatives), versus a comparison of features.



Net net?

Say only one thing.

Make sure it meets a need.

Do it creatively.

Predict the performance of any TV
ad in less than 15 minutes with

LINK AI™

Link AI is an AI-powered creative evaluation tool, fueled by Kantar's Link database of 200,000 tests and 30M human interactions, delivering your teams with uncompromised and actionable creative guidance. Test animatics, old creative and even competitive ads in the time it takes to finish your daily meditation.

As the backbone of Creative Guardrails 3, we used Link AI to analyze creative effectiveness across 45 TV ads and extended the findings using insights from Kantar's COVID-19 Barometer, weekly Pulse, Neuroscience and Qualitative learnings.

Click [here](#) for more information.

KANTAR

**Understand People
Inspire Growth**