

Spark North 2019

Identity economy and media marketing

Douglas McCabe | douglas.mccabe@endersanalysis.com | 020 7851 0900 | @douglasmccabe

Our subscribers: the creative & advertising ecosystem

Film/Television

21st Century Fox, Arqiva, BBC, BBC Worldwide, Bein Sports, Box Plus, Channel 4, Digital UK, Discovery Communications Europe, Endemol Shine Group, Fox Networks Group, Freeview, IMG Media, ITV, Ludorum, NBC Universal International, Premier Sport, Scripps Networks Interactive, SevenOne Media, Sky, Sony Pictures Entertainment, STV Group, Turner Broadcasting, UKTV, Viacom, Virgin Media, Vivendi, Walt Disney Company, Warner Bros Entertainment UK, YouView

Telecoms

BT, EE, H3G, Liberty Global, Openreach, Samsung, TalkTalk Group, Telefónica, Tesco Telecoms, Utility Warehouse, Vodafone, Vonage UK

Publishing

Archant, Bertelsmann, Centaur, DC Thomson, DMGT, Dow Jones, ESI Media, Financial Times, Future, Guardian Media Group, Hearst, Immediate, Johnston Press, Magnetic, News UK, Newsworks, Penguin Random House, Telegraph Media Group, Time Inc, Reach, Which?

Tech

Amazon, Facebook, Google, Oath, AutoTrader, DAZN, Jobsite, NTT Data, UKOM Ltd

Agencies

BlueHive, Burrows UK, CHI, Cognifide, Engine, Finsbury, GroupM, Karmarama, M4C, Maxus, MEC, M/Six, MediaCom, Mindshare, Ogilvy & Mather, Possible, Primus, Salmon, Starcom, These Days, Wunderman, Xaxis

Music/Radio

Bauer Radio, BMG Rights Management, Communicorp UK, EMI Music Publishing, PRS for Music, Sony Music Entertainment, Spotify, Wireless Group, Universal Music Group, Vevo

Professional Services

Accenture, Afiniti, Allen & Overy, Baringa Partners, Bain & Company, Deloitte Consulting, DLA Piper, Ernst & Young, KPMG UK, Linklaters, McKinsey & Co, Miles 33, OC&C Strategy Consultants, Oliver & Ohlbaum Associates, PWC, Russell Reynolds Associates, Tata Consultancy Services, Venture Consulting (Australia), Venture Insights (Australia)

Public Sector

DCMS, European Commission, National Audit Office, Ofcom

Funds

Aberdeen Standard Investments, Baillie Gifford, CapeView Capital, Cedar Rock Capital, Cenkos Securities plc, Highfields Capital Management, LionTree, Morgan Stanley Investment Management, Veritas Investment Management

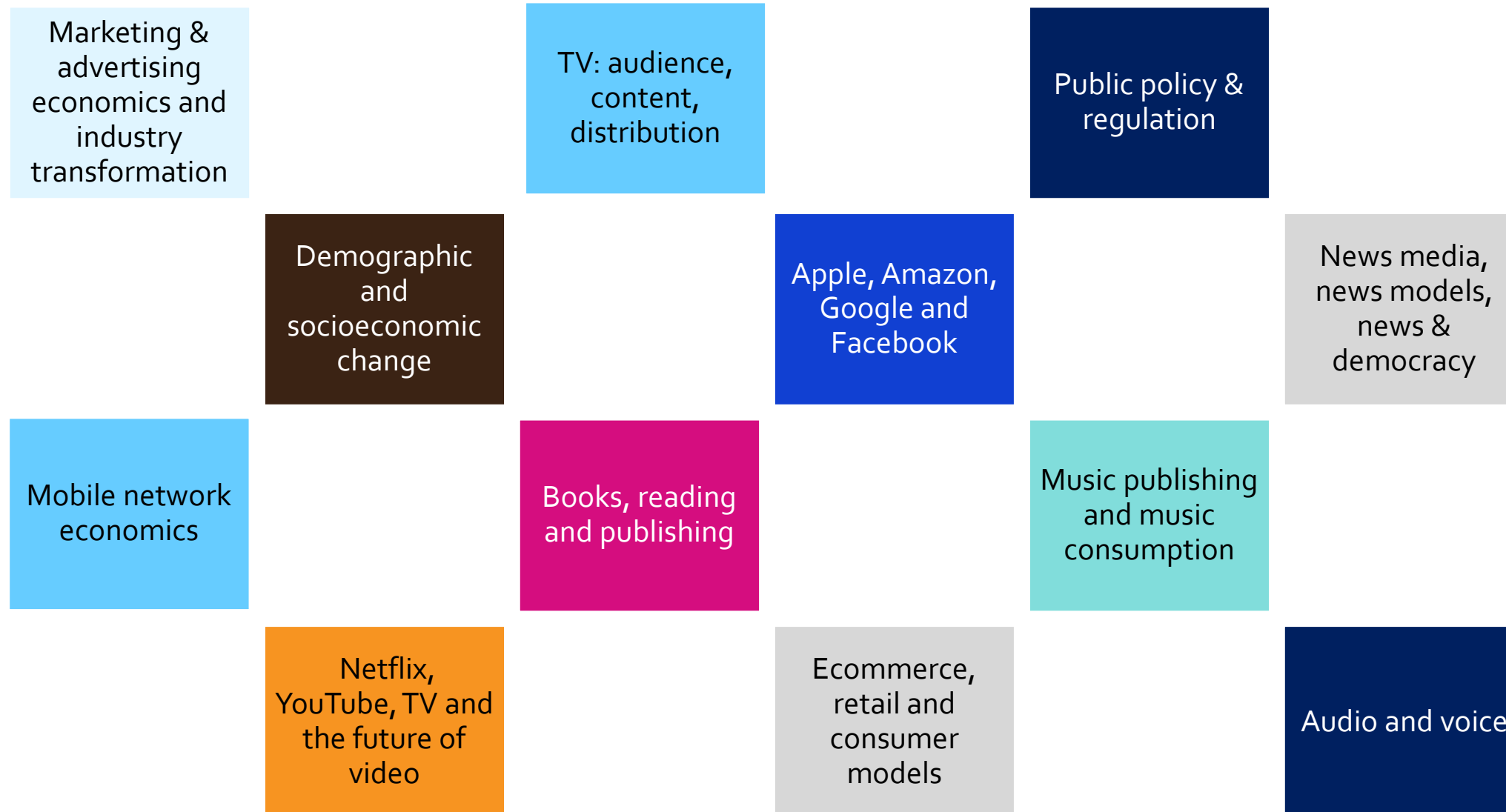
Investment Banks

Allen & Co, Barclays, BNP Paribas, Citigroup, Lepe Partners, Moelis & Co, NM Rothschild, The Raine Group

Private Equity/Venture Capital

Apax, Permira Advisors, Providence Equity, Searchlight Capital Partners, Taconic Capital Advisors, Usaha Tegas

Enders Analysis: a flavour of our research agenda

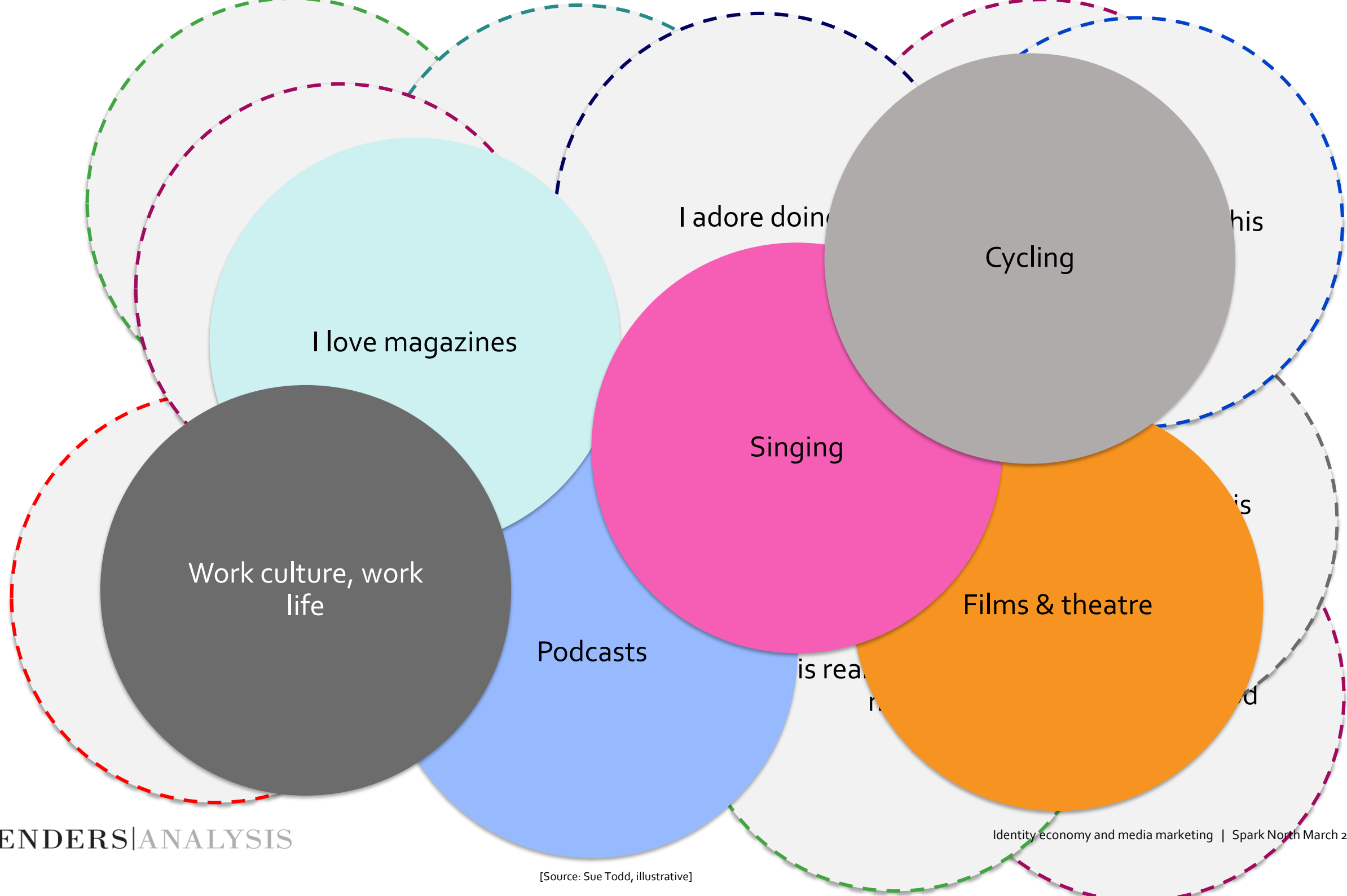


What is relevance in marketing?

ID

Emotional

What do we mean by identity?



A simple (very limited) shorthand – Twitter bio

Sue Todd
@suetodd2 Follows you

CEO Magnetic. Co-founder Culture 2.0. Likes singing, podcasts, cycling, films and plays. Follow [@magneticmedia](#) for latest magazine news

London & Kent
[magnetic.media](#)

Tweet to Sue Todd 2011

Tweets **Tweets & replies** **Media**

Sue Todd @suetodd2 · 2h
So true

Andrew Davidson @designandrewd
.@thatginamiller suggests 3 social media rules to teach young people:

- just because you don't know someone, it doesn't mean you're not hurting them
- don't trust sources you can't verify elsewhere...

Show this thread

[Source: Twitter, Sue Todd]

Example identity categories

Fashion	Lifestyle
Travel	Sport & wellbeing
Home	Dining & entertaining
Gadgets	Charities

[Source: Enders Analysis]

Brands and identity

BORROW MEMORIES:

“look out for archetypes, colours, symbols that have immediate communication power *to associate your brand with that category*”

- Jenni Romaniuk & Byron Sharp, *How Brands Grow*

How real identity works in advertising




Raleigh Superbe
Elegant and unique the Superbe is the perfect choice for those who demand the ultimate in a touring cycle. Exclusive built-in fitments include a Dynohub generator and lighting set, key-type fork lock and Sturmey-Archer 3-Speed hub. Fully equipped with Brooks leather saddle, rear carrier, and pump, plus new self adjusting brakes.
Gents Model DL24 available in 21" and 23" frame sizes in Bronze Green. Ladies Model DL24L available in 21" frame size in Bronze Green.

Raleigh Tourist
ESPECIALLY BUILT FOR TALL PEOPLE, the only bicycle available in America with 28" wheels in choice of 24" and 22" frame sizes. Fitted with Sturmey-Archer AW hub, rod brakes, roadster tires, pump and bag.
Tall Gents Model DL1 with 24" frame in Black. Tall Gals Model DL1L with 22" frame in Black.

Suggested Post

Bikes Online Store LIKE PAGE
Sponsored •

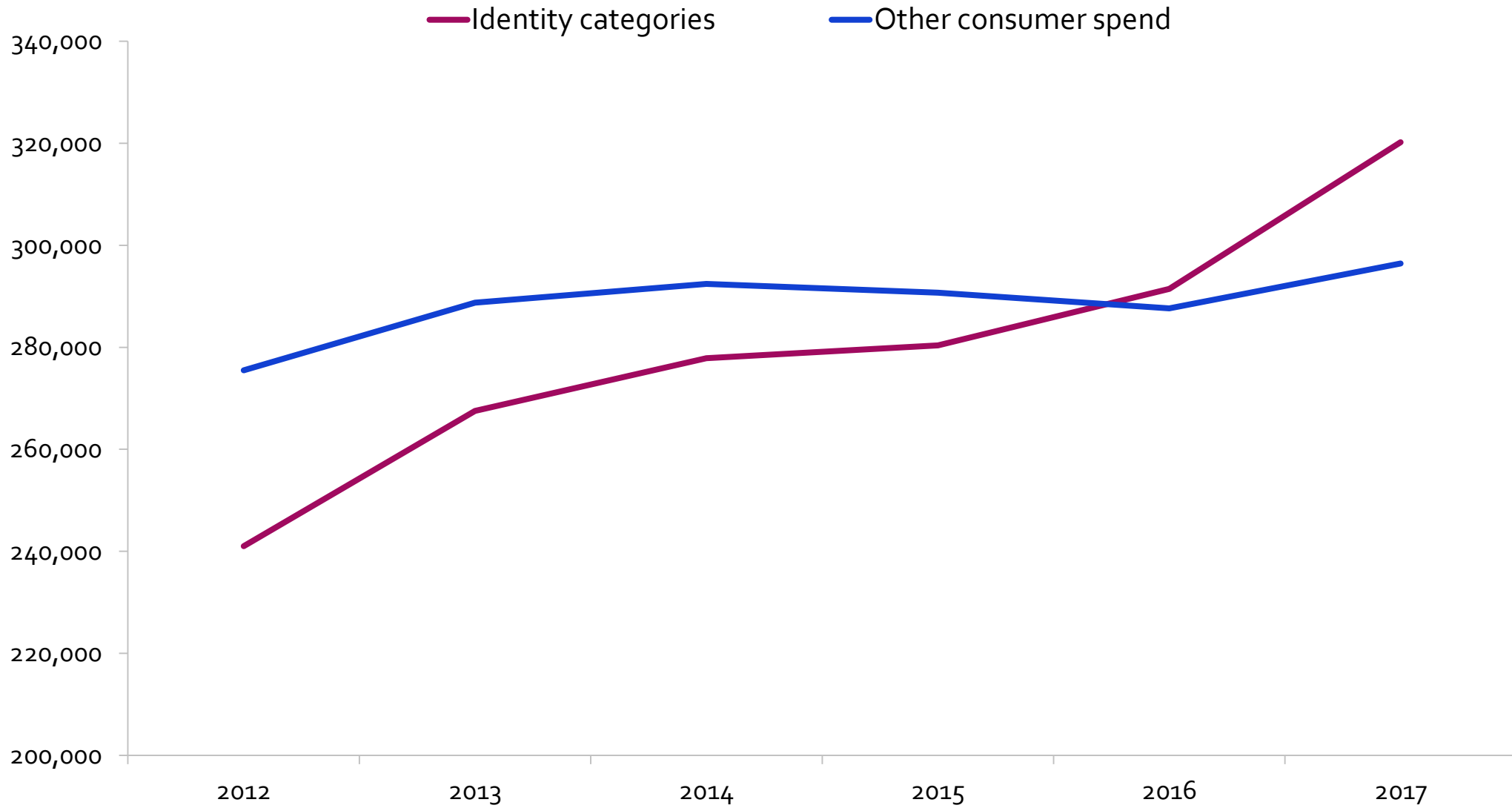
Flash Sale! SCOTT Bikes Store, 100% Genuine! Secure Online Shopping. Arrival in 3-5 days.



80% OFF
SHOP NOW

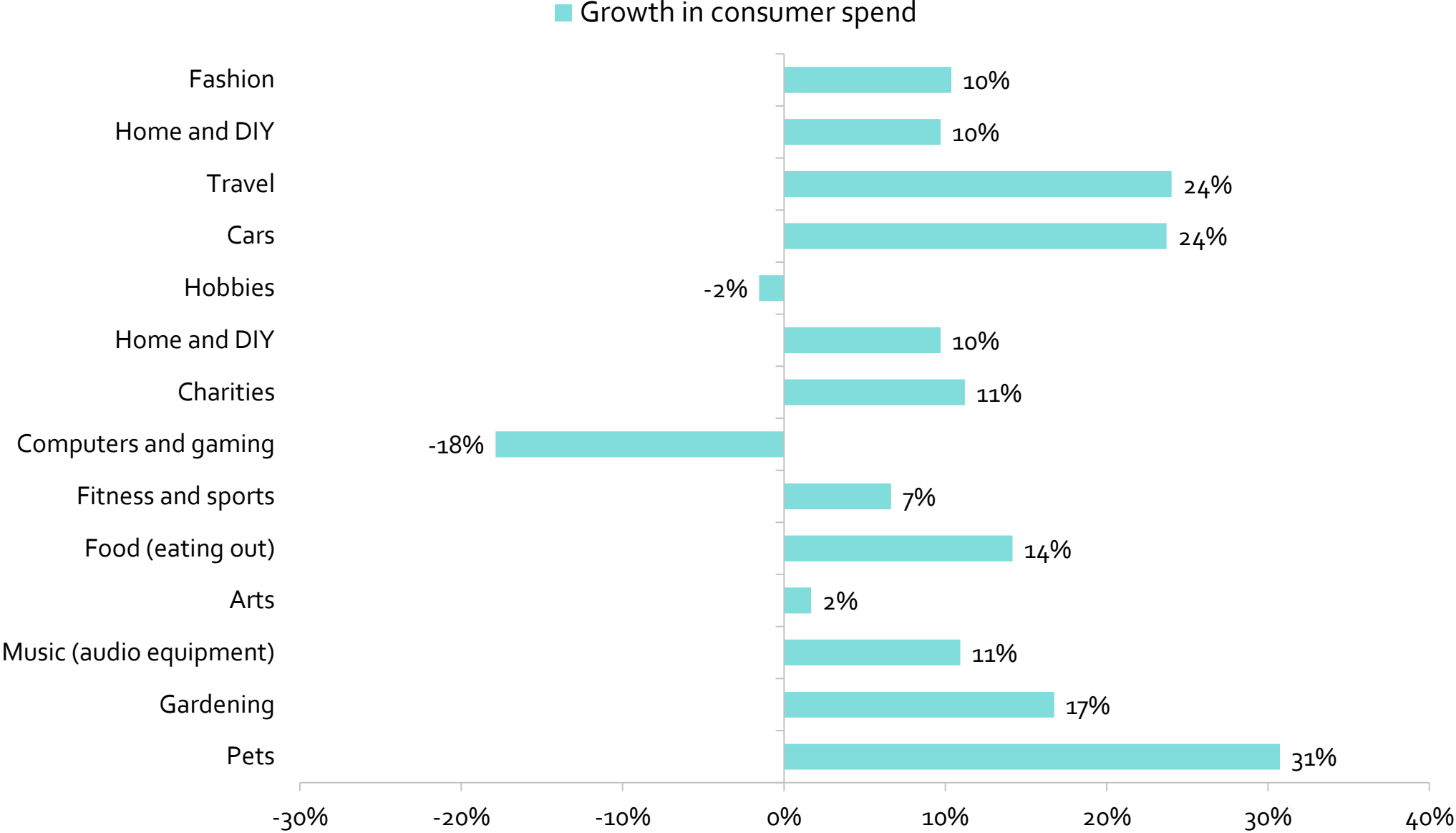
BRANDBICYCLES.HOP.COM
Flash Sale: £ 121.73!
Limited Time! SHOP NOW

Household spend: £100bn growth, 80% by identity categories



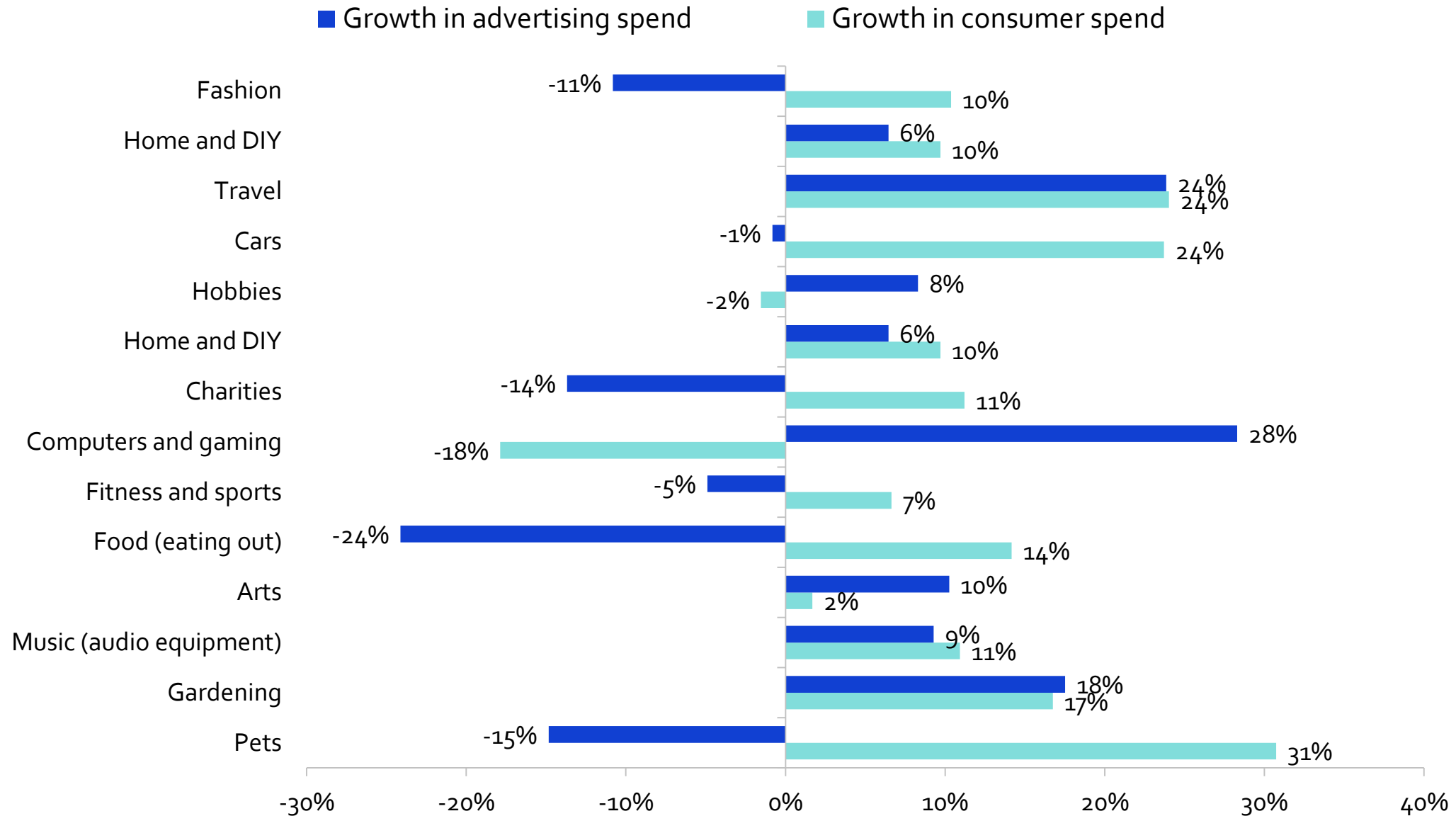
[Source: Enders Analysis, ONS]

Consumer spend growth in identity categories since 2015



[Source: Enders Analysis, ONS, Nielsen]

Consumer spend growth and advertising spend growth since 2015



[Source: Enders Analysis, ONS, Nielsen]

Key media differentiators for advertising success

“for people like me”

“relevant and useful to me”

“I get a sense of place”

“I feel good when reading it”

Case studies



We put two Cosmopolitan Home, Made HQ residents to the test with Smart Energy GB, to discover how much they really know about what goes into powering a home...

Sophie and Emily have lived with their three housemates in a Cosmopolitan Home, their morning in bed, number for new residents now – as you'd think they'd be pretty chuffed up on their fourth it costs to run the place. Using the Super Greenie of a smart meter – which shows you how much energy you're using and what it's costing in pounds and pence – we started the girls to get ready for a night and midnight tip of energy (think up the video at cosmopolitan.com/smartenergychallenge) and see how far they managed to get!

Their next challenge is to tell us exactly how much they think all the appliances they use every day really add to their bills and cost of living. Sophie said, when you do a little cheaper and get yourself to the house, you can see a little bit. How does anyone?

LET'S START NICE AND EASY: FOR TOP OF ENERGY, HOW MANY MUGGERS OF BLEND-DRINKING CAN YOU GET?

Sophie: After our getting ready challenge, I noticed the dial on our energy meter spiked when I had my blend for me, so I knew this one is a bit of an energy guzzler. I'll use an hour.

Emily: I'm going to be optimistic and say two hours. You saw my comment on going to be wildly disproportionate, but I'm interested to discover how much I do – and don't – know about our energy use!

EMILY: I've always on the hotful one – I can get through five in a day alone. I think 10 cups in one day was my personal best. I reckon you could hold a kettle 900 times for 10p.

EMILY: I used a coffee line thing in the morning to get the going, otherwise the completely useless, I think you could hold a ball for about 1.5 years.

ANSWER: We have to be the heaviest of that team, this morning a drink with one teaspoon in that, you can only get extra fuel out of it the cup. There is no way of measuring it, but we're strong and having to resist the temptations, all!

YOU'RE BATTLING WITH YOUR HOUSEMATES FOR A SPOT IN THE KITCHEN, THE STOVE IS IN USE FOR AN HOUR – HOW MUCH WOULD THIS COST YOU?

Sophie: I'm thinking it'll cost around one pound for an hour's worth of cooking. I think a gas stove would use quite a bit, but I'm not sure. I don't know for sure if it's worth anything, you'd never really think about it.

Emily: There's not an oven, and I reckon you're probably quite high in terms of energy consumption, as I'll get it going for an hour of cooking. We have a few vegetables and eggs in the house, so it's my own to cook for myself, I'll usually go for a hard core.

ANSWER: It goes over well, for 1.5p an hour, it's not a lot. In a house of five with people cooking in different times, you could save on gas by having a smart meter on the gas, so you can see how much you're using.

IF YOU WANT TO GET UP ON AN EVENING, HOW MUCH ENERGY DOES IT TAKE TO RUN A TV FOR AN HOUR?

Sophie: I think it's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.

Emily: I think it's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.

ANSWER: It's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.

PICTURE THE SCENE: IT'S A SUNDAY AFTERNOON, YOU STILL HAVE THE STAMP FROM LAST NIGHT'S CLUB ON YOUR HAND AND, OH YES, YOU'RE KUNDOVER. HOW MUCH WOULD THE ACCOMPANYING THREE...

"I'm sure my answers are going to be wildly disproportionate, but I'm interested to discover how much I do – and don't – know about our energy use"

20.17 minutes using top of energy making 10 more mugs than a gas stove

FANCY A CUPPA? IT'LL COST YOU AS A HOUSE OF COMMITTED TEA DRINKERS, HOW MANY TIMES CAN YOU BOIL THE KETTLE FOR TOP OF ENERGY?

Sophie: I've always on the hotful one – I can get through five in a day alone. I think 10 cups in one day was my personal best. I reckon you could hold a kettle 900 times for 10p.

EMILY: I used a coffee line thing in the morning to get the going, otherwise the completely useless, I think you could hold a ball for about 1.5 years.

ANSWER: We have to be the heaviest of that team, this morning a drink with one teaspoon in that, you can only get extra fuel out of it the cup. There is no way of measuring it, but we're strong and having to resist the temptations, all!

YOU'RE BATTLING WITH YOUR HOUSEMATES FOR A SPOT IN THE KITCHEN, THE STOVE IS IN USE FOR AN HOUR – HOW MUCH WOULD THIS COST YOU?

Sophie: I'm thinking it'll cost around one pound for an hour's worth of cooking. I think a gas stove would use quite a bit, but I'm not sure. I don't know for sure if it's worth anything, you'd never really think about it.

Emily: There's not an oven, and I reckon you're probably quite high in terms of energy consumption, as I'll get it going for an hour of cooking. We have a few vegetables and eggs in the house, so it's my own to cook for myself, I'll usually go for a hard core.

ANSWER: It goes over well, for 1.5p an hour, it's not a lot. In a house of five with people cooking in different times, you could save on gas by having a smart meter on the gas, so you can see how much you're using.

IF YOU WANT TO GET UP ON AN EVENING, HOW MUCH ENERGY DOES IT TAKE TO RUN A TV FOR AN HOUR?

Sophie: I think it's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.

Emily: I think it's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.

ANSWER: It's about 10p an hour. I don't know for sure, but I think it's about 10p an hour.



"I think 10 cups of hotful tea in one day was my personal best. I reckon you could boil a kettle 900 times for 10p."

SOPHIE: I've always on the hotful one – I can get through five in a day alone. I think 10 cups in one day was my personal best. I reckon you could hold a kettle 900 times for 10p.

EMILY: I used a coffee line thing in the morning to get the going, otherwise the completely useless, I think you could hold a ball for about 1.5 years.

ANSWER: We have to be the heaviest of that team, this morning a drink with one teaspoon in that, you can only get extra fuel out of it the cup. There is no way of measuring it, but we're strong and having to resist the temptations, all!

[Source: British Army, Smart Energy campaigns]

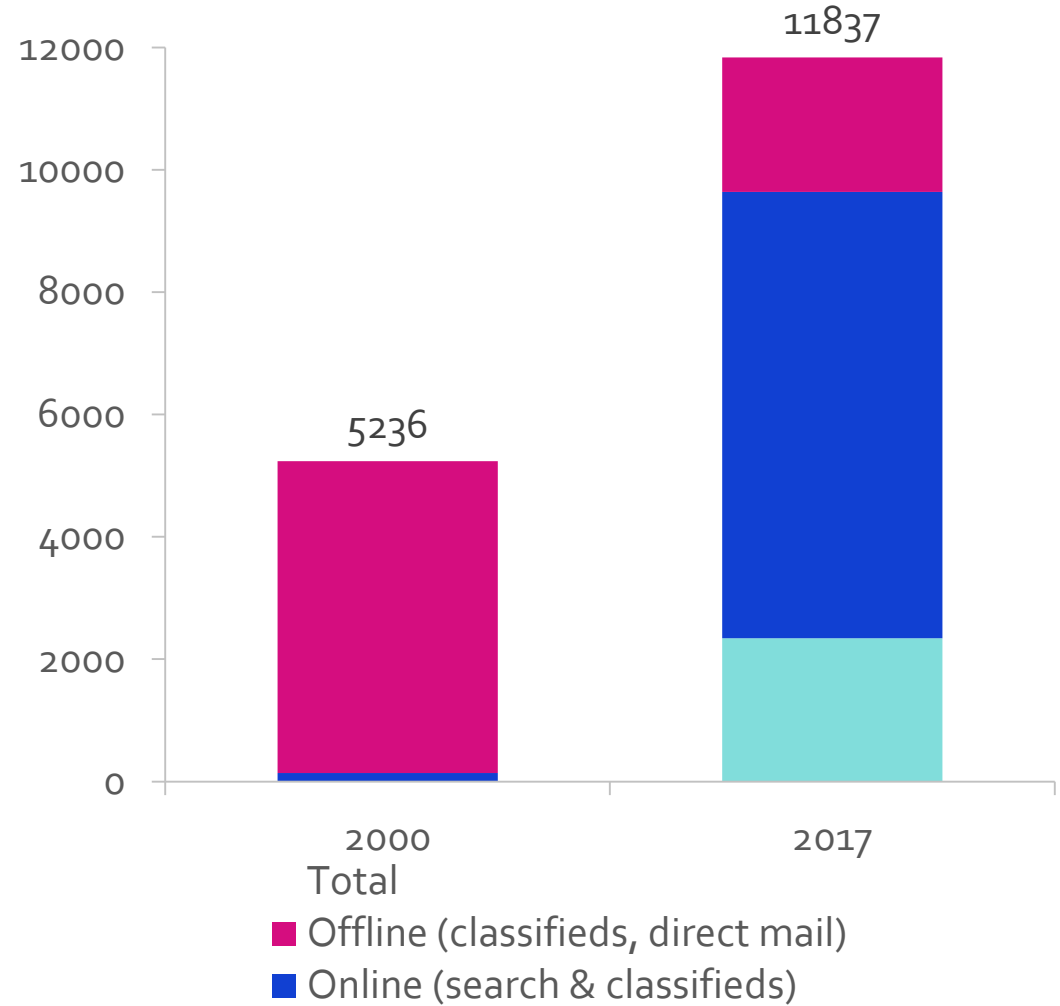
Stylist Live



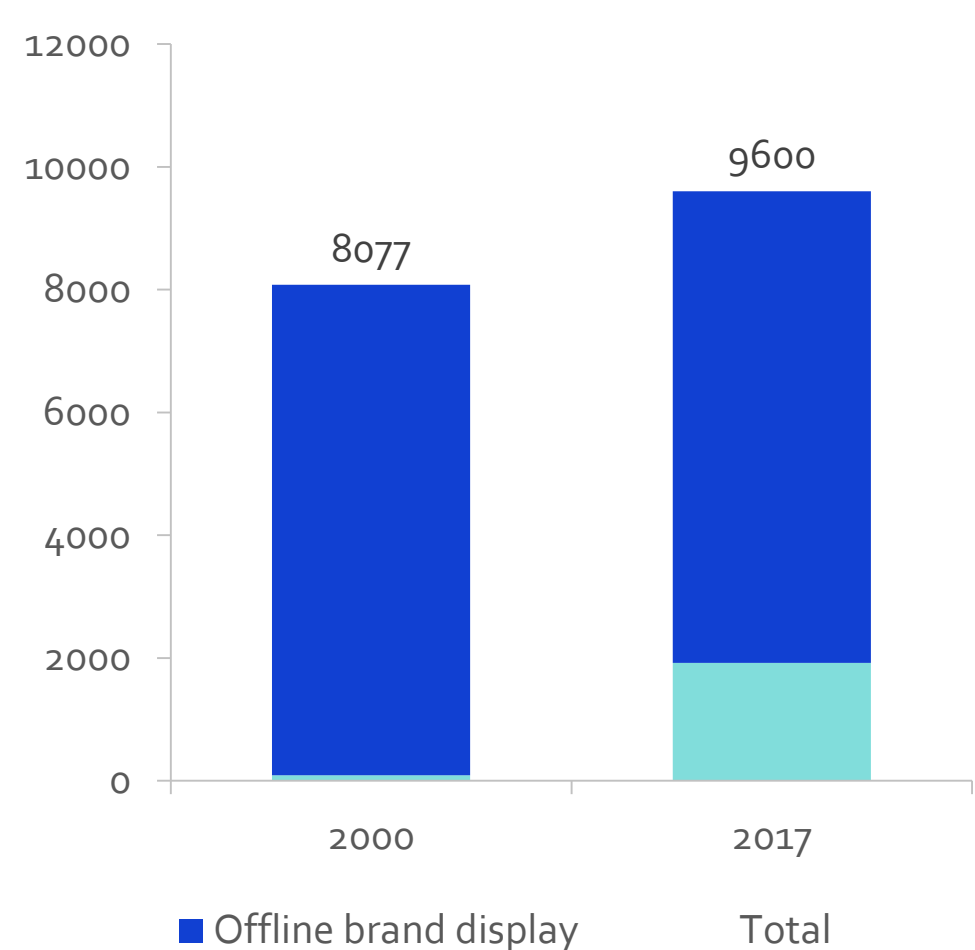
[Source: Stylist Live]

Marketing short-termism and the rise and rise of “always-on”

Direct response



Brand/display



[Source: Enders Analysis based on WARC]

Marketing planning is a product of business planning

1: What is the **business** objective?

2: What is the **marketing** objective?

3. Who is the **target audience**?

4. How is the **media primarily targeted**?

[Source: Enders Analysis]

What is relevance in marketing?

Overheard

Always on

Disclaimer

About Enders Analysis

Enders Analysis is a research and advisory firm based in London. We specialise in media, entertainment, mobile and fixed telecoms, with a special focus on new technologies and media, covering all sides of the market, from consumers and leading companies to regulation. For more information go to www.endersanalysis.com or contact us at info@endersanalysis.com.

Important notice: By accepting this research note, the recipient agrees to be bound by the following terms of use. This research note has been prepared by Enders Analysis Limited and published solely for guidance and general informational purposes. It may contain the personal opinions of research analysts based on research undertaken. This note has no regard to any specific recipient, including but not limited to any specific investment objectives, and should not be relied on by any recipient for investment or any other purposes. Enders Analysis Limited gives no undertaking to provide the recipient with access to any additional information or to update or keep current any information or opinions contained herein. The information and any opinions contained herein are based on sources believed to be reliable but the information relied on has not been independently verified. Enders Analysis Limited, its officers, employees and agents make no warranties or representations, express or implied, as to the accuracy or completeness of information and opinions contained herein and exclude all liability to the fullest extent permitted by law for any direct or indirect loss or damage or any other costs or expenses of any kind which may arise directly or indirectly out of the use of this note, including but not limited to anything caused by any viruses or any failures in computer transmission. The recipient hereby indemnifies Enders Analysis Limited, its officers, employees and agents and any entity which directly or indirectly controls, is controlled by, or is under direct or indirect common control with Enders Analysis Limited from time to time, against any direct or indirect loss or damage or any other costs or expenses of any kind which they may incur directly or indirectly as a result of the recipient's use of this note.

© 2018 Enders Analysis Limited. All rights reserved. No part of this note may be reproduced or distributed in any manner including, but not limited to, via the internet, without the prior permission of Enders Analysis Limited. If you have not received this note directly from Enders Analysis Limited, your receipt is unauthorised. Please return this note to Enders Analysis Limited immediately.