

MASTERING MOMENT MARKETING

An analysis of moment marketing adoption and best practice strategy

September 2016



TVTY

THE MOMENT MARKETING COMPANY

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> Executive summary: key findings

It's getting harder – and more expensive – for brands to capture consumer attention. This study provides evidence that digital marketing managers are turning to moment marketing and using more sophisticated techniques than before.

96% of digital marketing managers agree that advertising costs have risen over the past 12 months with 93% saying it is now harder to gain the same audience attention as a year ago.

Marketers are adopting a range of strategies to cope with advertising inflation. Around a fifth are cutting expenditure or requesting more budget but the most common response is to introduce more focus into marketing strategies – by running fewer campaigns, using more precise targeting of audiences, or placing greater focus on engagement.

As a result, interest in moment marketing has surged. Today, 81% of respondents say they have launched moment marketing campaigns in the past year, with marketers from the business, financial and retail sectors most likely to have done so.

When asked which offline macro moments respondents were using to launch moment marketing campaigns, the most popular was sport (61%), followed by TV shows (45%) and brands' own TV advertising campaigns (34%).

Whilst moment marketing across a particular event can represent a more effective way to focus marketing spend and engage consumers, brands are beginning to take an even more granular approach, by targeting 'moments within moments'. These ultra-

targeted 'micro moments' mean spend is further optimised at the exact point when consumers are most likely to be paying attention.

The research shows a third (34%) of brands are now using specific micro moments within events to trigger real-time campaigns. Travel and Automotive leads the way with this approach, but still only half are using micro moments. The Consumer Goods sector is a straggler, with no respondent having used the micro moment approach.

Brands are also constantly monitoring data about particular moments that could occur at any time. When this data is used to trigger a campaign, it's called an 'Always Ready' campaign. The top three triggers being: changes in the weather (21%); and the TV advertising of competitors (17%); and travel metrics such as flight delays (10%).

In November 2015, just 32% digital marketing managers said they were using automated processes to launch moment marketing campaigns: that figure now stands at 52%, highlighting in the increasing use of technology to fuel the rise of moment marketing.

When devising a moment marketing strategy, only 47% of respondents involve the market research team, only 35% include the sales team while the creative team is embraced by just 32% of brands.

The Entertainment and Media industry has taken pole position as the sector which is mastering moment marketing, followed by Business and Retail sectors.

> Foreword from Elliott Reilhac, CEO, TVTY



In December 2015, Warc and Deloitte identified moment marketing as one of the top global marketing trends for the forthcoming year. Marketing Week also pointed to the strategy as a trend likely to shape media in 2016.

And how right they were. As this paper shows, 2016 has already seen some of the world's biggest brands - including HTC, Grey Goose and Walkers - tap into offline moments that matter to trigger culturally and contextually relevant digital advertising campaigns.

It appears that adoption has been driven - at least in part - by continuing pressure to optimise ad spend, against a backdrop of the rising cost of consumer attention.

But undoubtedly, moment marketing is also allowing brands to launch highly innovative campaigns that are delivering amazing results.

This progress is hugely encouraging, but moment marketing remains a relatively new strategy, and very little data or practical advice is available to brands just beginning their journey.

That's why we commissioned the in-depth, independent research that underpins this report.

Our hope is that the results help marketers benchmark where they're at in their use of moment marketing.

We also wanted to share some best practice examples of moment marketing campaigns in action, along with some useful tools and frameworks to aid the development of moment marketing strategy.

This includes the very first glossary of moment marketing terms, something we've created in an effort to help different departments within a brand, as well as their agency partners, to use a common language to describe their moment marketing strategies.

I hope you enjoy reading the paper and would love to hear about your experiences of moment marketing.

Best wishes,

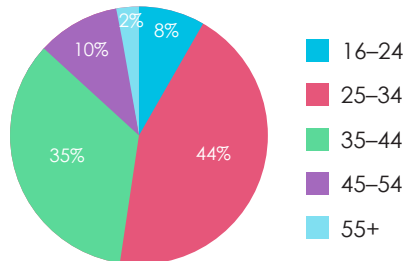
A handwritten signature in black ink that reads "E. Reilhac". The signature is written in a cursive, slightly stylized font.

> Methodology

To create this paper, TVTY commissioned independent market research company Censuswide to survey 200 digital marketers in June 2016. The respondents all work within companies with turnovers of at least £1 million. Agency-side digital marketers were excluded from this study. Each respondent was asked to complete an in-depth questionnaire about moment marketing. Unless otherwise stated, all statistics referenced relate to this survey.

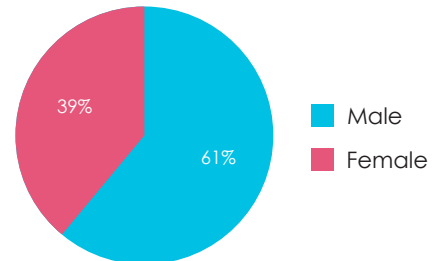
> About the respondents

Age



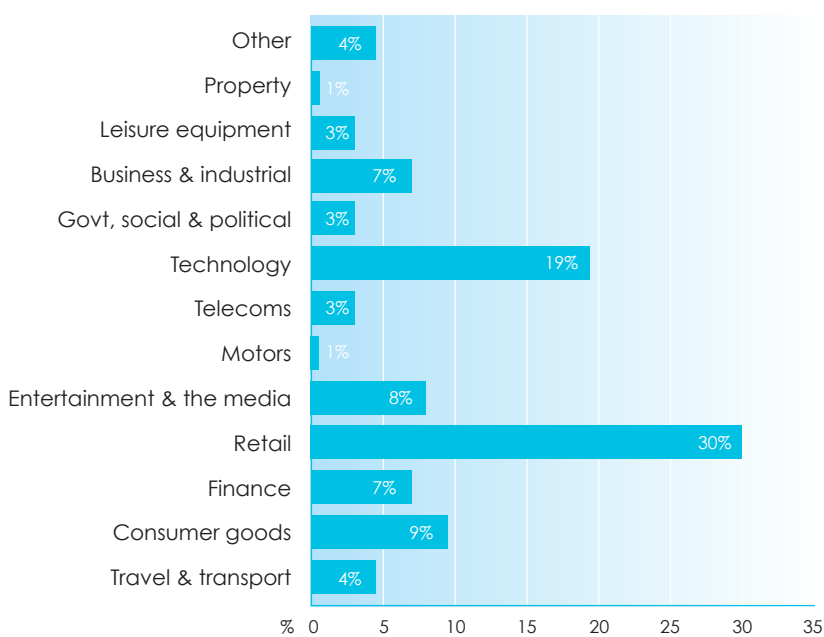
Source: TVTY

Gender



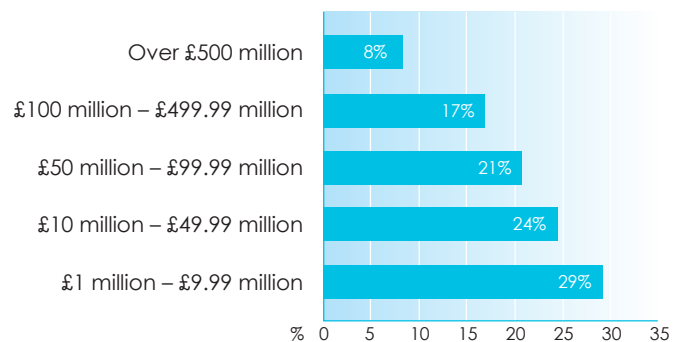
Source: TVTY

Sectors



Source: TVTY

Company turnover



Source: TVTY



> The rising cost of advertising

Advertising inflation

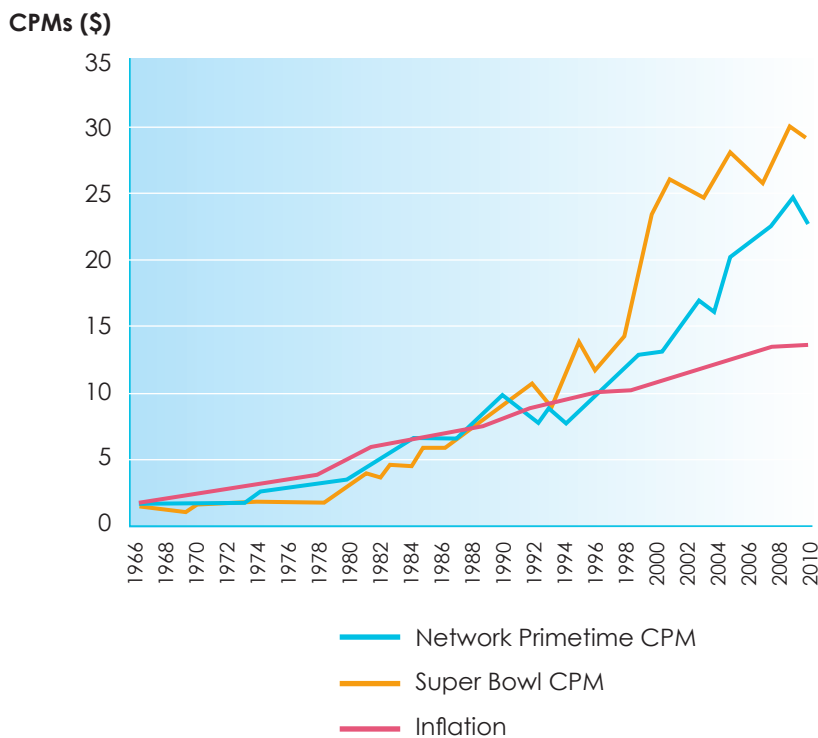
Before consumers can be affected by advertising, they first need to pay attention. But it's getting harder – and more expensive – for brands to capture attention.

Harvard Business Review has described how the 'rising cost of attention' is making it harder for advertisers to reach the same number of consumers, highlighting how, for example, the average cost of a 30-second Super Bowl advertisement has increased by 76% during the past decade. (see figure 1)

But the rising costs of advertising trend applies just as much to digital channels. Hochman Consultants have shown how average PPC costs have steadily risen over the past three years, whilst conversion rates have fallen (fig 2).

This study provides further evidence that digital marketing managers are feeling the pinch, with 96% of respondents agreeing that advertising costs have risen over the past 12 months. 93% say it is now harder to gain the same audience attention as a year ago.

Figure 1 – The Rising Cost of Consumer Attention: Why You Should Care, and What You Can Do about It by Thales S. Teixeira, Harvard Business Review



Source: TVTY



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Figure 2 – Average PPCs 2013-2015 (Source: Hochman Consultants)

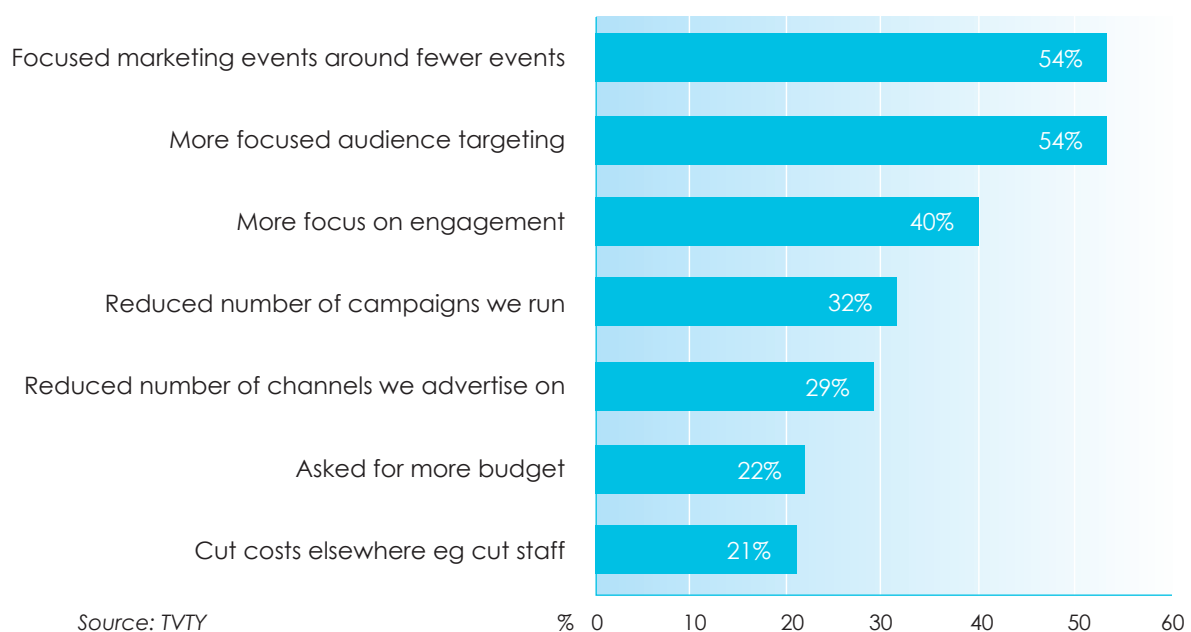
Metric	2015	2014	2013
Cost per click (CPC)	\$1.58	\$1.02	\$0.92
Click-through rate (CTR)	0.8%	0.9%	0.5%
Average ad position	1.8	1.9	2.1
Cost per mille (CPM)	\$12.07	\$8.81	\$4.70
Conversion rate	3.6%	4.7%	8.8%
Cost per conversion	\$44.50	\$30.25	\$10.44
Invalid click rate	9.8%	7.8%	8.3%

Source: TVTY

To cope with this 'advertising inflation', marketers have adopted a variety of strategies over the past 12 months. For some, this has inevitably led to cost cutting, with one in five (21%) saying they have cut expenditure on things like staff. Around the same number (22%) say they've responded by requesting more budget.

But the most common response is to introduce more focus into marketing strategies – by running fewer campaigns, using more precise targeting of audiences, or placing greater focus on engagement.

Figure 3 – How have you responded to the rising cost of advertising over the past 12 months?



Source: TVTY

Mastering Moment Marketing

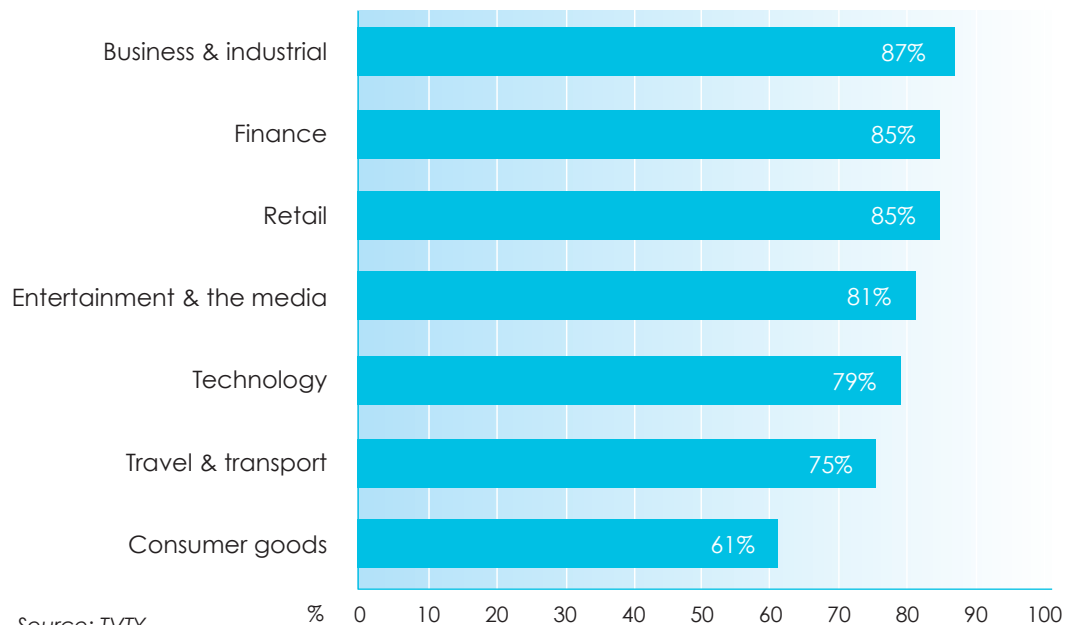
Moment marketing as a way to optimise spend

In December 2015, the influential 2016 *Marketing Trends* report from Warc & Deloitte highlighted moment marketing as a top strategy they expected marketers to adopt in the year ahead.

And our data confirms that, faced with a need to optimise marketing spend more effectively, interest in moment marketing has indeed surged.

81% of respondents say they have launched moment marketing campaigns in the past year, with marketers from the business, financial and retail sectors most likely to have done so.

Figure 4 – Percentage of marketers launching moment marketing campaigns in last 12 month, by sector



Moment marketing campaigns mean brands focus their spend around a particular event, or 'macro moment' that they know is likely to engage their target audience and increase spend on digital marketing during that event.

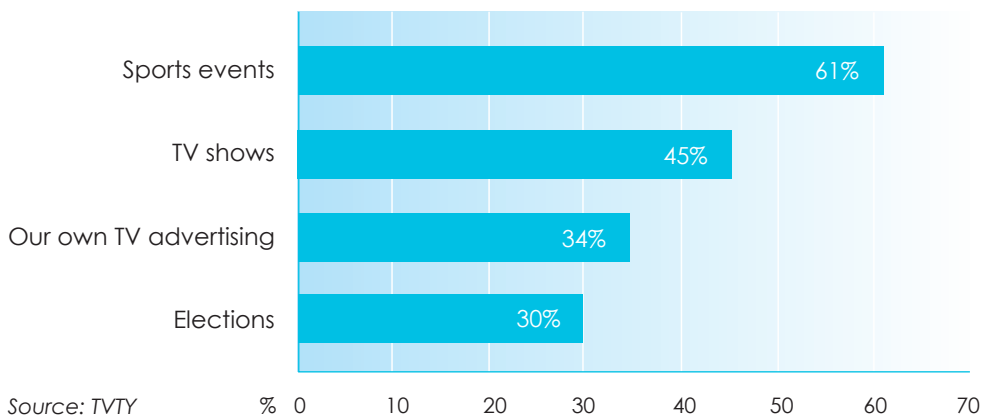
This approach optimises spend by ensuring a brand message is only served when consumers are most likely to be engaged.

We asked respondents which offline macro moment events they were using to launch moment marketing campaigns around and found the most popular was sport (61%), followed by TV shows (45%) and brands' own TV advertising campaigns (34%).



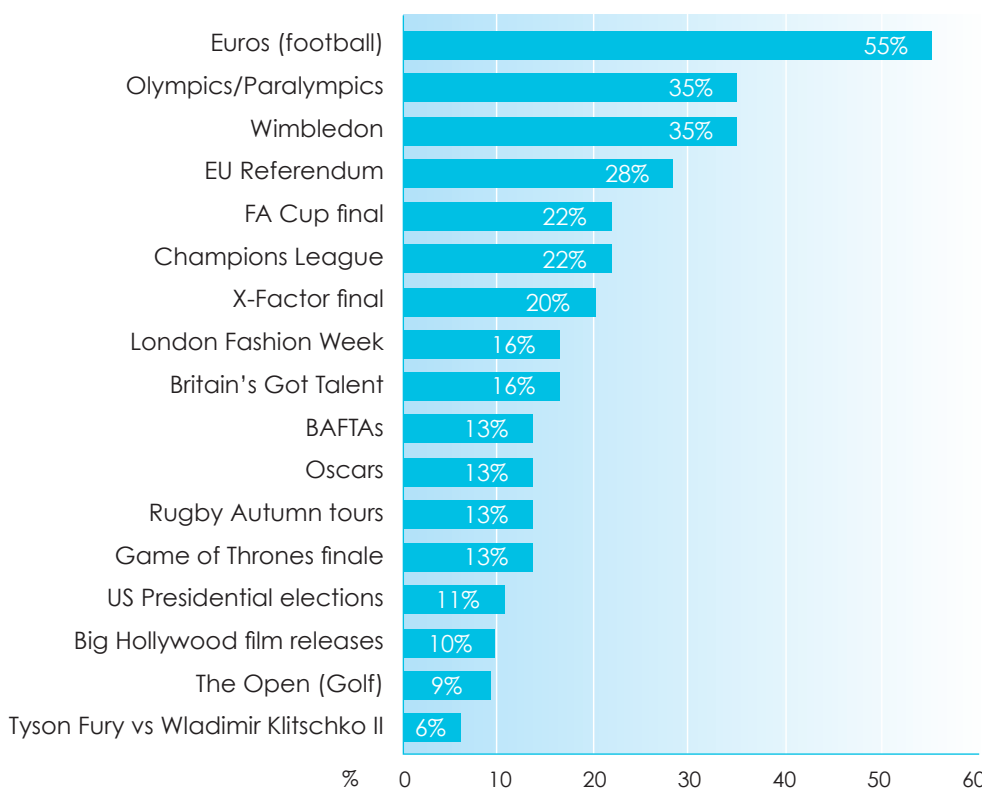
Mastering Moment Marketing

Figure 5 – The top events used to trigger moment marketing campaigns



Major 'live' events look set to dominate moment marketing campaigns in the year ahead, as brands seek to tap into consumer interest around major occasions, such as the Olympic Games.

Figure 6 – Top events brands plan to launch moment marketing events around in 2016



Source: TVTY



> The rise of micro moments

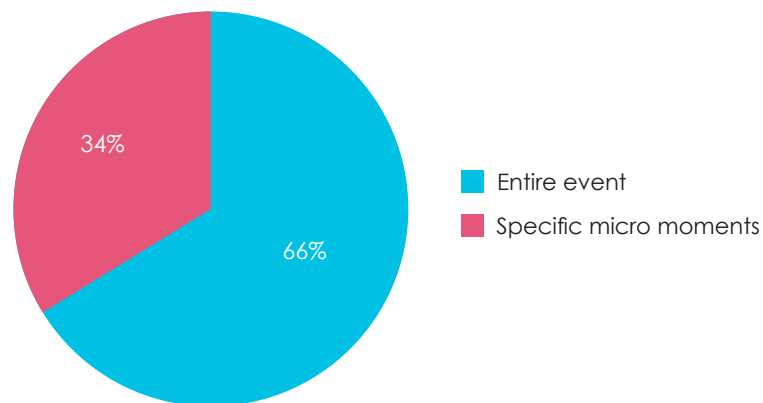
Moments within moments

Whilst moment marketing across a particular event can represent a more effective way to focus marketing spend and engage consumers, some brands are beginning to take an even more granular approach, by targeting 'moments within moments'. These ultra-targeted 'micro moments' mean spend is further optimised at the exact point when consumers are most likely to be paying attention.

For example, a brand might choose to only launch a digital display campaign when a specific footballer that is loved by their audience scores a goal during a match.

The research shows a third (34%) of brands are now using specific micro moments within events to trigger real-time campaigns. Travel and Automotive leads the way with this approach, but still only half are using micro moments. The Consumer Goods sector is a straggler, with no respondent having used the micro moment approach.

Figure 7 – Brands targeting 'moments within moments'

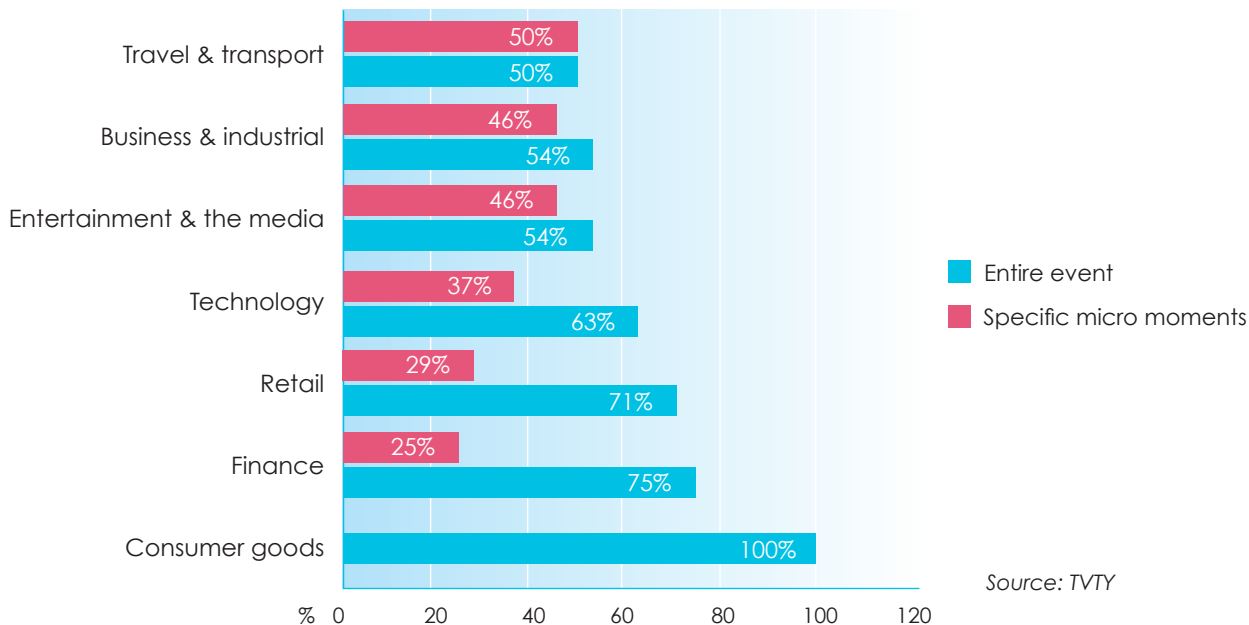


Source: TVTY



Mastering Moment Marketing

Figure 8 – Brands targeting ‘moments within moments’ by sector

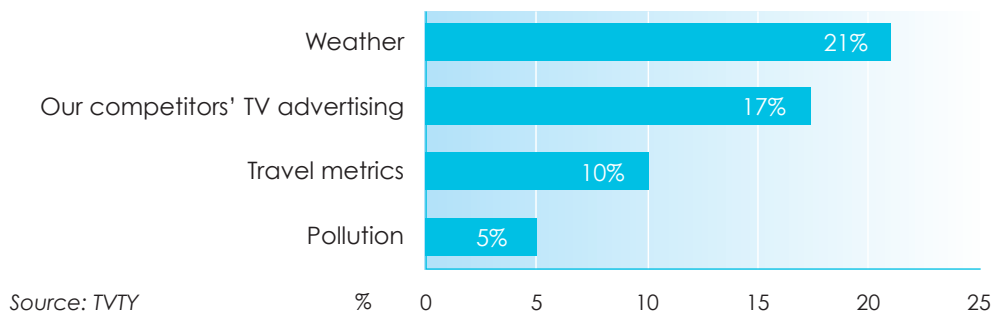


‘Always Ready’ campaigns

Whilst targeting micro moments within a specific event that has a defined beginning and end (e.g. a football match) makes a lot of sense, other every day micro moments that are constantly occurring can also be used to trigger campaigns. An example might be when the temperature hits a certain level, or when pollen passes a particular threshold.

The research provided evidence that brands are also constantly monitoring data about such micro moments via ‘Always Ready’ campaigns, with the top three triggers being: changes in the weather (21%); and the TV advertising of competitors (17%); and travel metrics such as flight delays (10%).

Figure 9 – Top four micro moments triggers underpinning Always Ready campaigns



> Man v Machine

The rise of automated moment marketing campaigns

The increasing interest in monitoring and responding to micro moments with Always Ready campaigns perhaps explains why we're seeing a clear shift towards greater automation of moment marketing campaigns. Clearly, when brands are wanting to react instantly, 24/7, to such triggers, it is virtually impossible to do so manually.

A further reason that automation is becoming increasingly important is that more brands are using several combinations of multiple triggers to create Combined Moment campaigns. The Danone best practice case study on page 18 is a great example of this.

> The need for cross-departmental collaboration

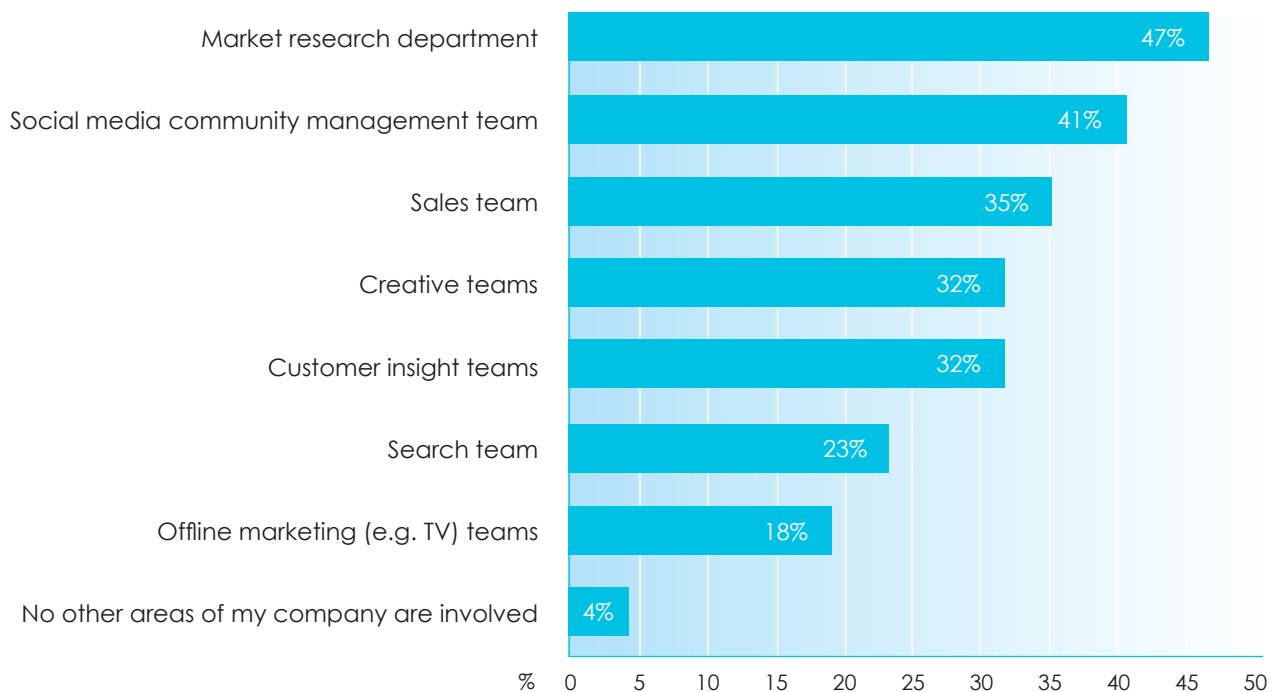
As moment marketing campaigns take a more central role in the communications strategies of brands, it might be expected that more departments would be involved.

Yet, the research shows that many digital marketing managers devise their moment marketing strategy in isolation.

When asked which departments contribute to the moment marketing strategy planning process, only 47% of respondents said they involve the market research team, only 35% include the sales team while the creative team is embraced by just 32% of brands.

We expect this to change - to develop a coherent and effective moment marketing strategy, it is vital that a detailed profile of the intended audience is developed, by involving the consumer insight team. Indeed, 98% of respondents said they would like more detailed insight about the kinds of offline triggers that impact their target consumer's moods and purchasing behaviour.

Figure 10 – Brand departments involved in devising a moment marketing strategy



Source: TVTY

> Moment marketing sector sophistication analysis

In the first ever moment marketing analysis, which we published in November 2015, the travel sector came out on top as the leader in the emerging discipline of moment marketing.

This latest research suggests that in 2016, the Entertainment and Media industry has taken pole position as the sector which is mastering moment marketing, followed by Business and Retail sectors.

This is not because travel is regressing in sophistication but rather the result of best-practice spreading and industries converging. As knowledge and technology becomes more widespread, previous laggards find it easier to catch-up meaning industries must to innovate to become a moment marketing leader.

The ranking was calculated by scoring respondents from each sector against six indicators on moment marketing maturity and sophistication:

- **Adoption** – implementing any type of moment marketing campaign (macro, micro, Always Ready)
- **Planning** – taking a long term approach to moment marketing by incorporating the strategy into the wider marketing plan and involving the wider-business in the process
- **Consumer understanding** – identifying the moments that matter for a target audience
- **Scalability** - utilisation of automated processes to launch campaigns
- **Insight** – incorporating expertise from within the wider business to form strategy
- **Tactics** – using triggers more advanced than simply events, for example, micro-moments and Always Ready campaigns

Figure 11 – Industry sectors ranked by moment marketing sophistication

Sector	Ranking
Entertainment & Media	1
Business & Industrial	2
Retail	3
Travel & Transport	4
Finance	5
Technology	6
Consumer Goods	7

Source: TVTY

> Mastering moment marketing

At TVTY, we're lucky enough to work with brands and agencies to shape moment marketing campaigns every day. Several of these have gone on to win awards. This unique insight has allowed us to develop a framework to help marketers think about their own approach to moment marketing.

Moment planning:

There are two major factors which need to be taken into to consideration when planning for moment marketing:

Macro moments

Micro moments

Macro moments are the key events which spark interest throughout the year. These moments can be major sporting events, religious festivals / holidays, London fashion week, X-factor, seasonal occasions i.e. bank holiday, Easter, Summer, Back to School, Christmas etc. These events are publicly known and can be planned for.

Micro moments are the moments which do not stand out and which are less obvious. These moments are consumer-centric and understanding the consumer's engagement when you reach out to them when the moments are right for the brand and consumer are crucial.

These micro moments might include: when your brand's TV commercial has aired; a competitor's TV commercial; a change in weather; the key outcome of sporting events; pollen or pollution levels; social chatter etc. These micro moments play a huge role in which how consumers perceive your brand, product or service. Planning for these micro moments can yield great benefits for your brand.

A good starting point for planning for micro moments are identifying the stimulus point for your brand / product. You can achieve this by:

Creating a micro moment marketing calendar: What are the seasonal impacts: do consumers engage more with your brand when the temperature has reached a certain point or during public holidays?

Aligning the micro moments with business intent: What are the business goals throughout the year and how do you engage with your consumers in order to achieve your goals? Is there any activity planned for TV?

Contextual experience: Aligning the marketing messaging / proposition for offline and online media in order to keep the communication consistent.

7 steps to successful moment marketing

1. Gather together the relevant experts

Creating a moment marketing strategy usually involves a range of experts from the brand, the media agency, and a technology company. This encourages the development of more creative and advanced tactics as it provides a more rounded, and specific, understanding of the audience. The brands most successful at moment marketing get everyone together early to agree the strategy.

2. Ensure you're all speaking the same language

With multiple people involved, it's important everyone is using a consistent language to avoid confusion. This is particularly important because moment marketing remains an emerging discipline and has spawned many new terms. We have created a glossary of common moment marketing terms, below.

3. Align your moment marketing objectives to your overall marketing objectives

Moment marketing is most effective when the campaign objectives are aligned to the wider marketing objectives. The diagram to the right gives examples of how top-level marketing objectives can be overlaid onto a moment marketing campaign to inform the strategy.

4. Analyse consumer behaviour

It's critical to understand which underlying factors are most likely to impact the mood and purchasing behaviour of your target audience. This is where working with your consumer insights team and other parts of the wider business can be hugely beneficial. For Danone, its Actimel brand was particularly relevant when consumers needed to stay strong, at times when they were 'having a bad day' so this influenced the triggers selected.

ALIGN YOUR MARKETING OBJECTIVES TO MOMENT MARKETING



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5. Select your triggers

There are an infinite number of events and moments you could choose to underpin your campaign, so it's important to consider a range of possible triggers, including both macro and micro moments. The chart to the right highlights some possible questions to ask at this stage to help you define the triggers that might work best for you. You should also consider which bespoke data sources you have access to, which might form new kinds of triggers, and how you can creatively combine triggers to really cut through with consumers and optimise spend.

6. Use a platform that allows you to launch campaigns automatically and monitor effectiveness

Automating your moment marketing allows you to constantly track the triggers you've selected and set up rules to launch campaigns when certain conditions are met. The example to the right shows how an automated campaign tracking temperature triggers a Google campaign in real time. A strong tech platform should also allow you to track effectiveness in real time. This is critical for Always Ready campaigns.

7. Measure, review, learn

As with any marketing, it's crucial to review each campaign and assess the reaction from consumers. If possible, giving the technology partner access to ongoing real-time campaign performance data and trackers will provide more transparency and insights which, when shared back with the original planning team, will inform your next campaign and improve future results.

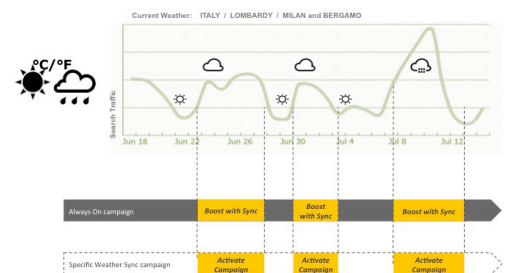
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BOOST TRAFFIC GENERATED BY WEATHER CHANGES



> Best practice examples

The below examples are stand-out moment marketing campaigns we have seen over the last 12 months and are can be used as campaign inspiration.

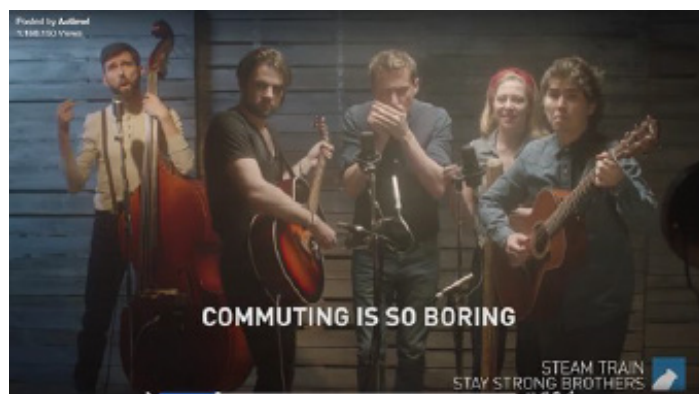
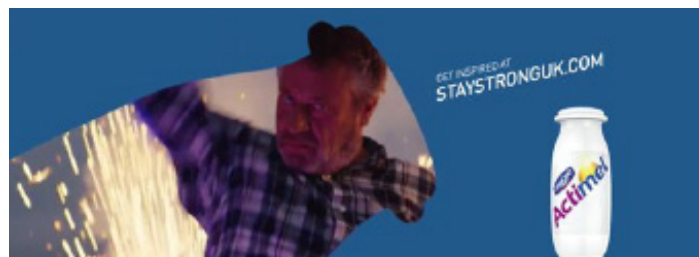
Danone Actimel: Targeting Bad Day Moments

Major health supplement brand, Actimel sought to increase brand awareness, boost reach and strengthen the relationship with its audience with a digital advertising campaign focused around stressful moments during the day.

In partnership with MEC, the brand developed a completely moment-centered marketing strategy that would connect with consumers when it knew people would be having a bad day. These moments included: when it rained in a particular region of the UK, during times of high pollen, during TV ads and programmes about healthy living and when hashtags and keywords related to transport delays.

The creative was dynamic as it changed depending on the event that triggered the campaign. For example, when the weather trigger was activated, the ad served was of a music band singing a song with the lyrics, "It's raining, it's pouring, commuting is boring" (see below).

The results of the campaign were impressive with the number of brand mentions up 218% and the click-through-rate increasing 39%.



HTC: launching the M9 smartphone

HTC, one of the world's largest mobile device suppliers, wanted its digital marketing activity to promote awareness and drive sales of its new M9 smartphone. The company, in partnership with Accuen, automatically synchronised their digital marketing campaigns with the most relevant offline moments for their target audience. For HTC, these moments were during its TV ads and when its competitors' TV ads were being aired. As HTC is also big sponsor of the UEFA Champions League, the campaign ran during key in-game moments, as shown below.



The campaign saw outstanding results. Specifically, a 100% increase in click through rates and a 47% reduction in cost per clicks.

Walkers: 'Countdown to Kit-Off'

Gary Lineker promised he would present Match of the Day in his pants if his boyhood team, Leicester City, won the Barclays Premier League. As the Foxes drew closer to the title, Walkers wanted to highlight its Leicester City sponsorship so the brand launched 'Countdown to Kit-Off'.

The campaign featured a dynamic ad creative of Gary Lineker covered only with packets of crisps that disappeared as Leicester drew closer to one of the greatest sporting achievements based on live scores of the game (shown below). When Leicester City's title win was finally official, Walkers celebrated the occasion in real-time by serving ads proudly unveiling Gary's entire body, with just a pack of limited edition Salt & Victory Walkers crisps covering his modesty.



The campaign achieved its overall objective with the increase in brand awareness hitting 9%.

> Moment marketing Glossary

Moment marketing

Moment marketing is the ability to shape your online advertising activity based on any relevant moment from the offline world in real-time.

Macro moment

A broad term from something which is likely to influence your target audience's behaviour (eg a weather event, a sports event, a TV ad campaign, an awards ceremony) that you might want to focus your moment marketing around.

Micro moment

A very specific point in time when something happens which impacts consumer behaviour (eg a goal is scored, or the temperature hits a certain threshold).

Trigger

The underlying source of data about an event that is used to underpin a moment marketing campaign. Examples include: air temperature; traffic congestion levels; pollen count; live-feed of player performance; stock market levels. Triggers can be created from any real-time data source.

Moment Planning

The process of deciding which moments matter most to a brand's target consumers. The practice should involve a range of departments within the business, such as market research, not just digital marketing.

Rule / Scenario

The pre-determined instruction relating to a trigger at which an advertising campaign is adjusted, eg 'when temperature reaches 25 degrees, we will increase spend on display ads by 20%'.

Trigger platform

The technology which allows you to manage moment marketing campaigns by selecting and monitoring triggers, setting rules, and analysing performance. A platform should integrate with programmatic media buying platforms.

Dynamic creative

A way to display different messaging or creative in ads served as part of a moment marketing campaign – based on rules, and micro moments. For example, displaying the real-time football match score in the ad creative

TV Sync

A form of moment marketing campaign triggered by TV adverts - specifically either TV Boost or TV Conquest.

TV Boost

A type of moment marketing campaign that is activated by your own TV advert.

TV Conquest

A specific form of moment marketing campaign triggered by a competitor's TV advertising being aired.

TV-Guide sync

A type of moment marketing campaign that is activated by the events during live TV programmes – e.g. Eurovision

Opportunity horizon

The amount of time following a particular micro-moment during which a consumer is most likely to be influenced. For example, peak interest in a TV ad occurs within 10 seconds of an ad being aired.

Always Ready campaign

An approach to moment marketing which reacts continually to rules based on triggers that do not have a pre-determined beginning and end, such as weather patterns or stock market fluctuations.

Combined-moment campaigns

Using multiple triggers that all must be satisfied simultaneously to create a more complex rule – e.g., 'when it rains, between 8am and 10am and when traffic congestion is at a particular level.'

Cross-moment campaigns

Using multiple triggers simultaneously but just one condition needs to be satisfied - e.g., 'when it rains, or when traffic congestion is at a particular level.'

> About TVTY (www.tvty.tv)

TVTY is the world's first and award-winning Moment Marketing Company. Founded in 2009, the company believes it is more important than ever for brands to be in the moment when it comes to their marketing message. The technology enables brands to sync their digital campaigns in real-time with offline events such as TV shows, commercials, weather/weather forecasts, sporting events, financial triggers, and more. By delivering powerful messages in real-time that connect with people at key moments across devices and marketing channels, brands can exponentially increase their advertising ROI. TVTY works with some of the world's biggest brand such as Walkers, HTC, Danone, Peugeot, Coca-Cola, Kia and Vodafone to name a few.

TVTY's team of 60 experts manage moment marketing campaigns for over 1250 global brands, in 40 countries, across offices in Paris, London and New York. It is backed by leading tech investors including Partech Ventures, 360 Capital Partners and Serena Capital.

To find out more, contact: marketing@tvty.tv.

Or visit: <http://www.tvty.tv/>

