VIEWERSLOGIC

NielsenIQ

UPLIFTS

Measure. Analyze. Optimize

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Tesco, Sainsbury's, Morrisons

Methodology

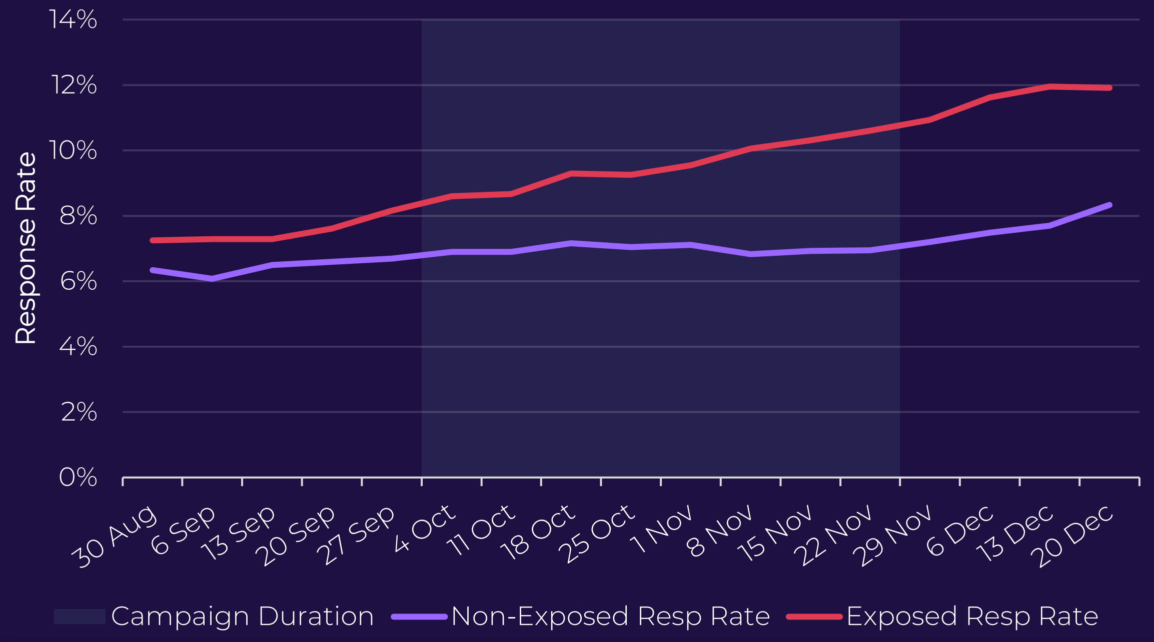
- The analysis effectively uses a test and control methodology.
  - **Control Group:** Individuals who were not exposed to TV activity from the brand in question during the campaign period or in the two months prior.

  - **Test Group:** Individuals who were exposed to TV activity from the brand in question during the campaign period but not in the two months prior.

- Those who were exposed to activity in the two months prior to the campaign period are **excluded completely** from the analysis.
- The analysis window takes place between **4th October – 28th November 2021**, as this represented an increase in spend for the majority of supermarkets. Waitrose had a break in their TV activity for the majority of this period, and have subsequently been excluded.
- The analysis works primarily with website visits, which is the response metric unless otherwise specified. Other metrics are app sessions (Active users per week) and footfall.

TV - Test vs Control Pattern in Web Traffic

Exposed vs **Non-Exposed** Response Rate by Week



- From the start of the campaign onwards there was a definitive increase in the Exposed Response Rate, while the Non-Exposed remained flat.
- The increase was a gradual one that built over time rather than an immediate spike, which speaks to the longevity of TV effectiveness.

Overall Growth of response rate

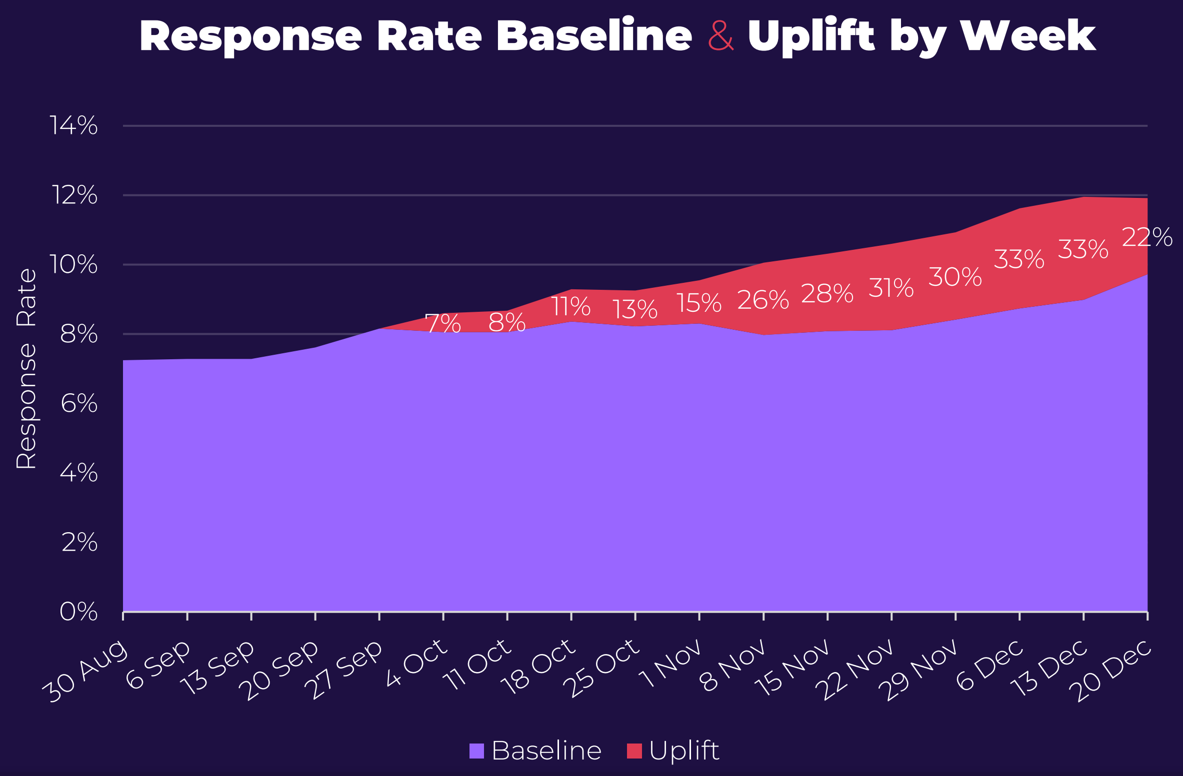
Non-Exposed (CG): **+2%**

Exposed (TG): **+4.5%**

Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

ASDA

TV – Uplift on Web Traffic



- The result is a healthy overall uplift that actually reached its peak in the few weeks after the end of the analysis window.

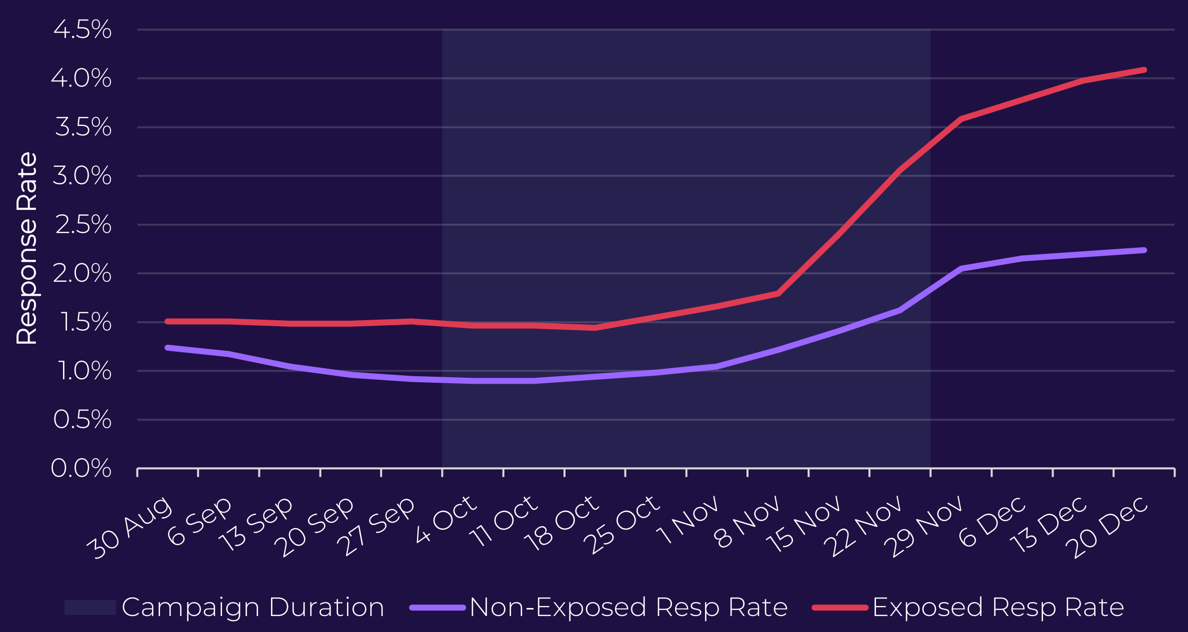
Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Total Uplift	137%
Impacts	568,911,300
Uplift per 10M Impacts	**2.4%**

ASDA

TV - Test vs Control Pattern in Footfall

Exposed vs **Non-Exposed** Response Rate by Week



- The shape of the footfall uplift is very different, as seasonality clearly had a major impact on both the Exposed and Non-Exposed group.
- Initially there is not much of an uplift at all, but the seasonal boost leading up to Christmas is noticeably stronger in the Exposed group.

Overall Growth of response rate

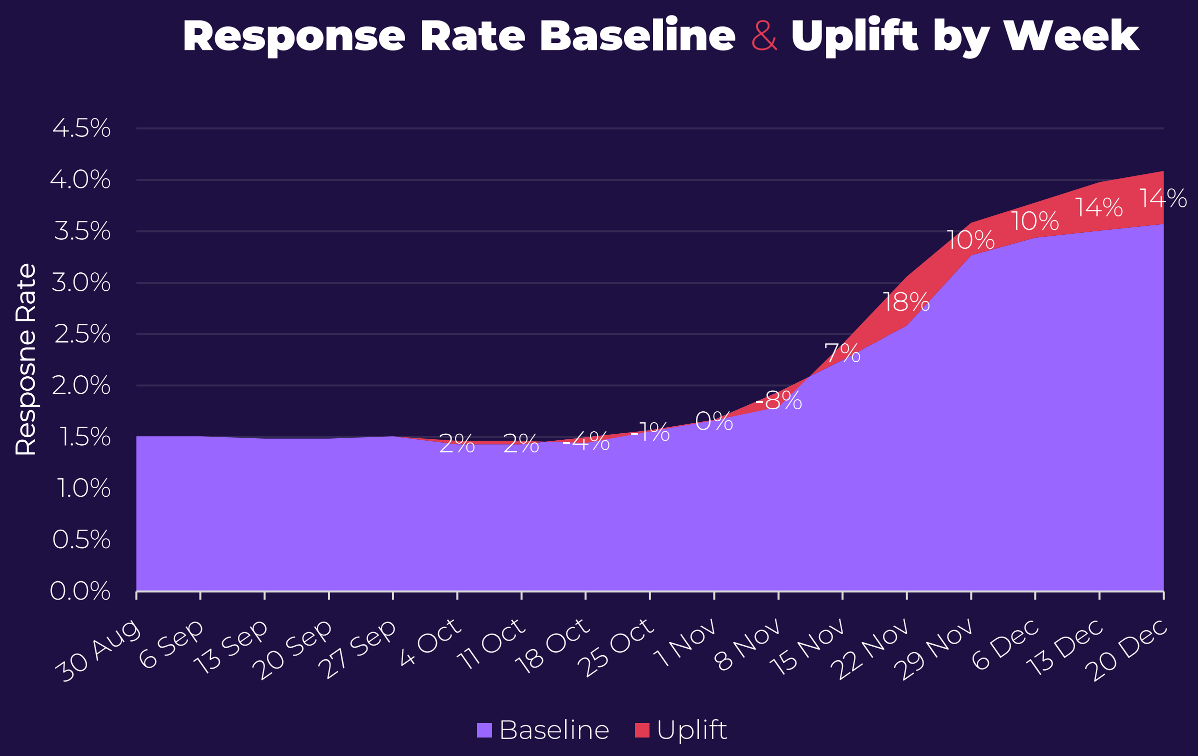
Non-Exposed (CG): +1%

Exposed (TG): +2.7%

Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

ASDA

TV – Uplift on Footfall



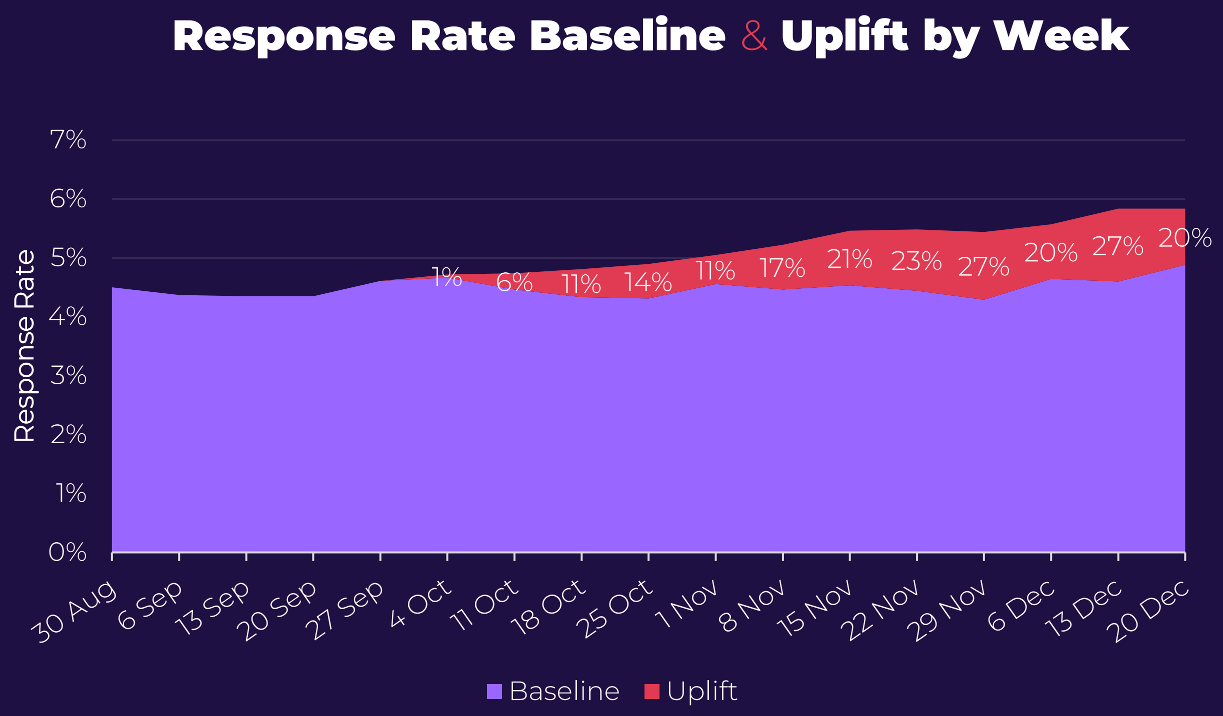
- Naturally, this is reflected in the uplifts, which don't really manifest themselves until the end of the analysis window, but keeps growing even after the end of the analysis window.
- The implication is that driving footfall through media is much more of a long-term undertaking compared to generating web response.

Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Total Uplift	**137%**
Impacts	568,911,300
Uplift per 10M Impacts	**2.4%**

ASDA

TV – Uplift on App Usage



- The patterns of app usage uplift sit in the middle between web response and footfall, but is closer to the former in the shape of the uplift, which is visible early on but builds steadily over time.

Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Total Uplift	104%
Impacts	568,911,300
Uplift per 10M Impacts	**1.8%**

ASDA

Supermarket Uplift Overview

Uplift per 10M Impacts	Web Uplift	Footfall Uplift	App Uplift
ASDA	2.4%	0.3%	1.8%
Morrisons	1.1%	0.6%	0.6%
Sainsbury's	3.7%	0.1%	1.2%
TESCO	1.3%	0.2%	0.4%

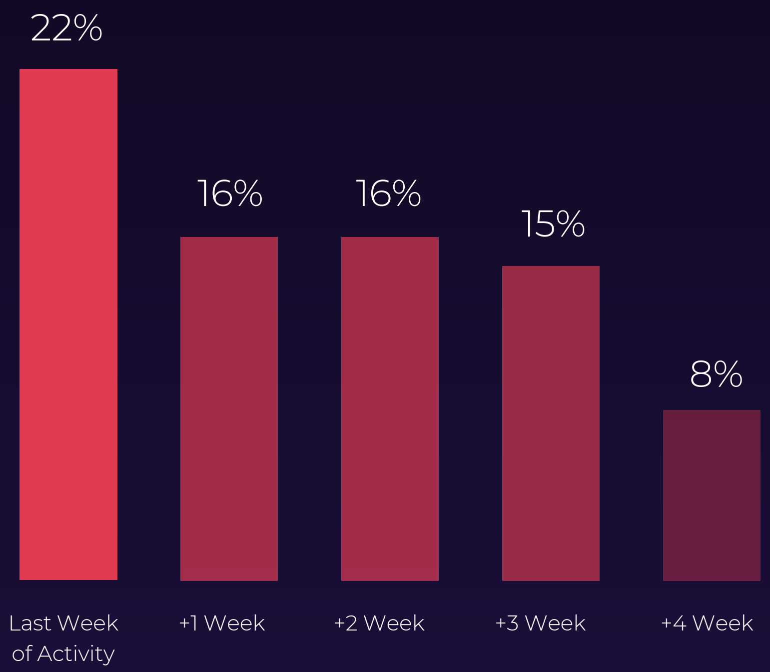
- When compared to the uplifts of competitors (See appendix for details), the Asda activity looks strong. The uplift was the second highest for both web traffic and footfall (Second to Sainsbury's and Morrisons respectively) and the highest for app usage.

  The tendencies are the same across all retailers – uplifts are highest for web traffic, followed by app usage, with footfall being the slowest metric to move.

Deepdive

Carryover

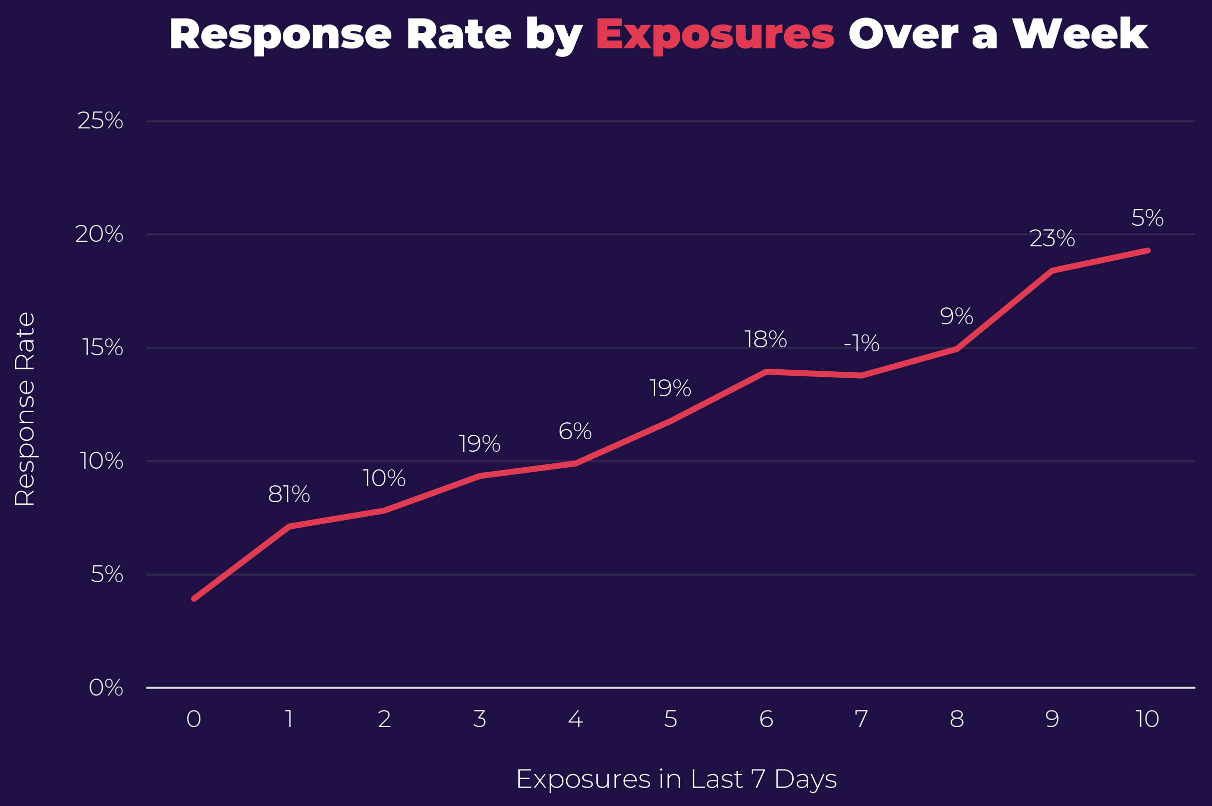
Uplift Carryover by Week



- Here we compare the uplift in web traffic during the last week of the analysis window with the subsequent weeks to observe the drop-off and quantify the carryover of Asda's TV activity.
- We see a noticeable drop-off from the last week of the window to the next one, but note that the sustained uplift between Week +1 and Week +3 only drops off marginally. The real drop-off only occurs from Week +4 onwards.

Sample sizes::
6,667 web visits

Frequency

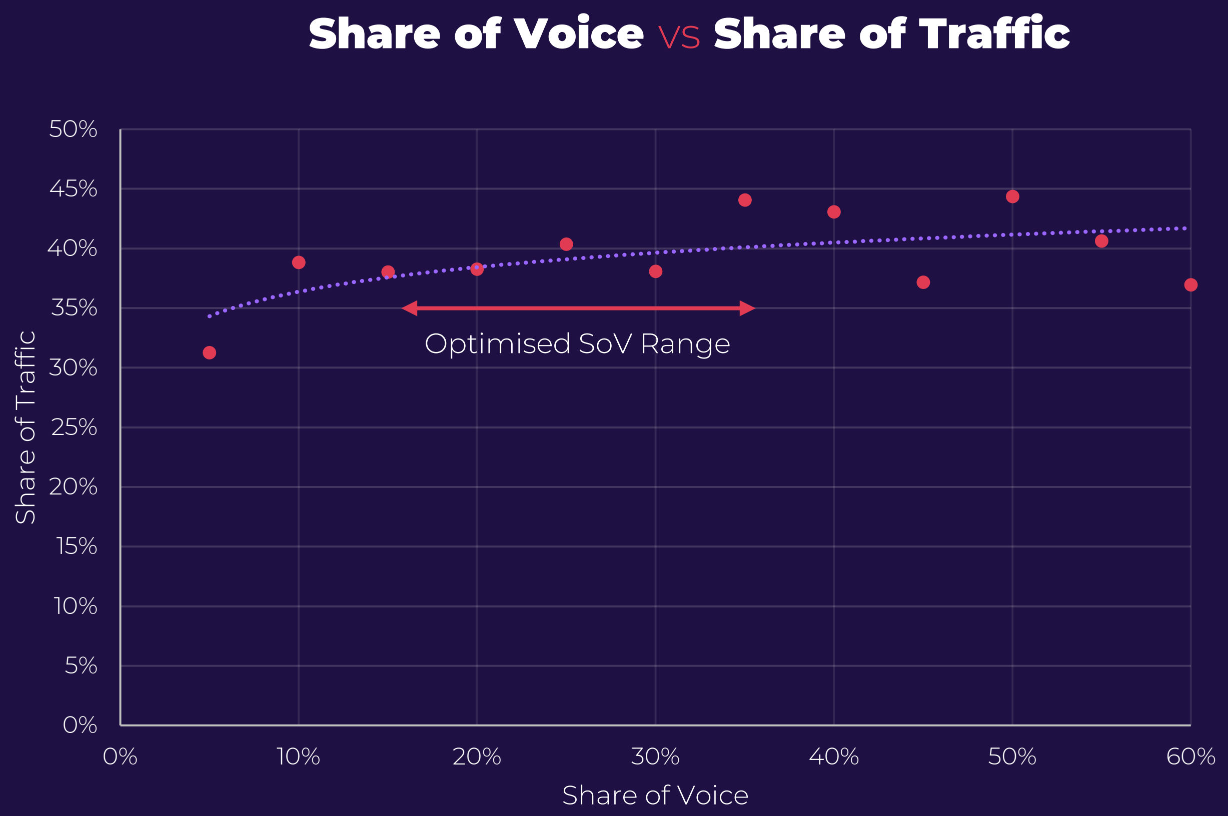


- This shows the web visit response rates for different frequency levels over the course of a week. The labels show the change in response rate from the previous increment (1 exposure is 81% more effective than 0, 2 is 10% stronger than 1, etc).
- The biggest improvement is by far the difference between 0 and 1. The implication is that reach plays a vital role in generating response. However, there is a clear improvement in response rates with increased frequency.

Sample sizes::
18,345 web visits

ASDA

Share of Voice vs Share of Traffic

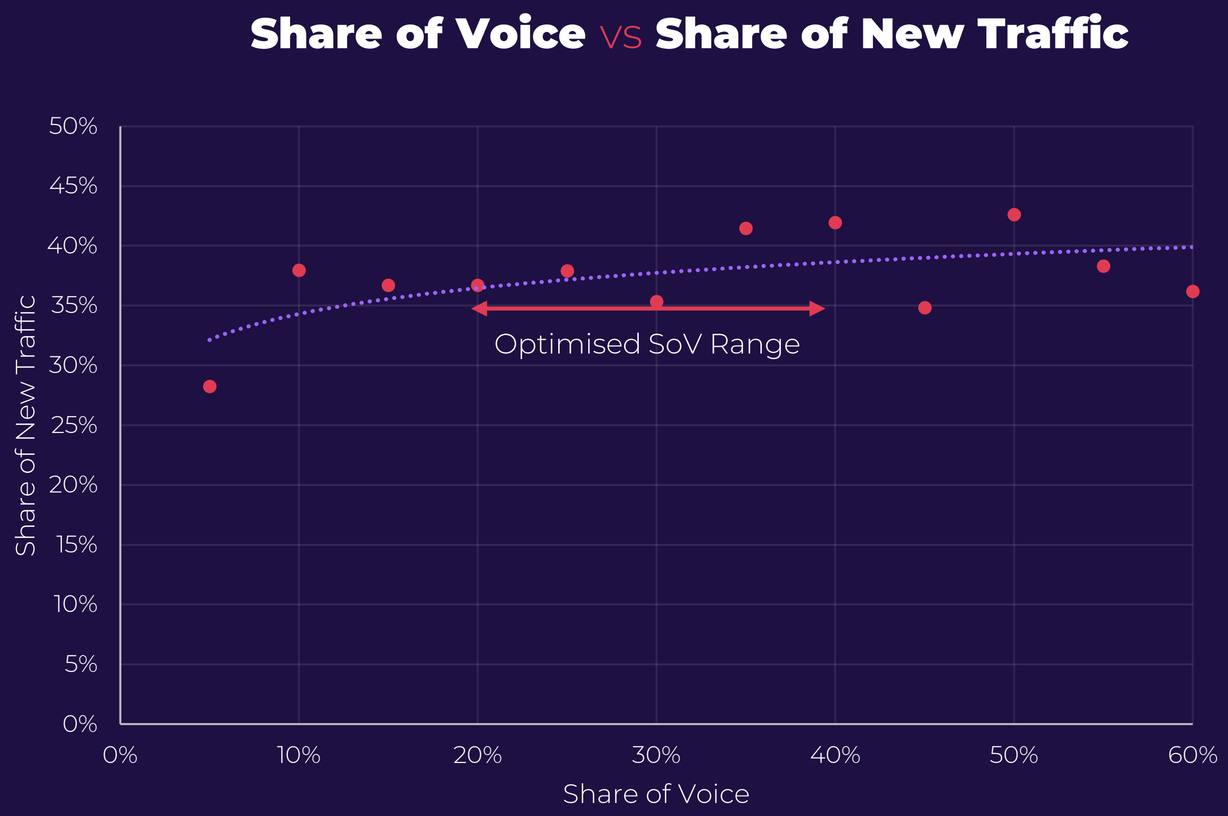


- Here we see the relationship between Share of Voice (At aggregated 5% increments) and Share of Traffic. SoV is calculated on an individual level, looking at the number of supermarket ads each user sees, with Asda's percentage of these being their SoV.
- As expected, SoV correlates with Share of Traffic, but there are definite diminishing returns. The range where the activity yields the best benefits is between 10-25%.

Sample sizes::
69,058 web visits
(Asda, Tesco & Sainsbury's)

ASDA

Share of Voice vs Share of New Traffic



- When we look specifically at share of new traffic (I.e. people who have not visited the website in question before), the tendency is largely the same, but the shape of the trendline changes somewhat.
- Diminishing returns occur at a later stage, and the increase in Share of Traffic is also slower to build, suggesting that a higher SoV is necessary for an acquisition strategy. The range of maximum returns is now at 20%-35%.

Sample sizes::
6,029 web visitors
(Asda, Tesco & Sainsbury's)

ASDA

Traffic Segments

	Asda Visitors	All sectors Visitors	Competitor Visits Without Any Asda Visits
Avg Asda Ads Week Prior	2.1	2	1.5
Avg Total Ads Week Prior	8.3	8.3	6.6
Asda Share of Voice	24.8%	24.2%	23.2%

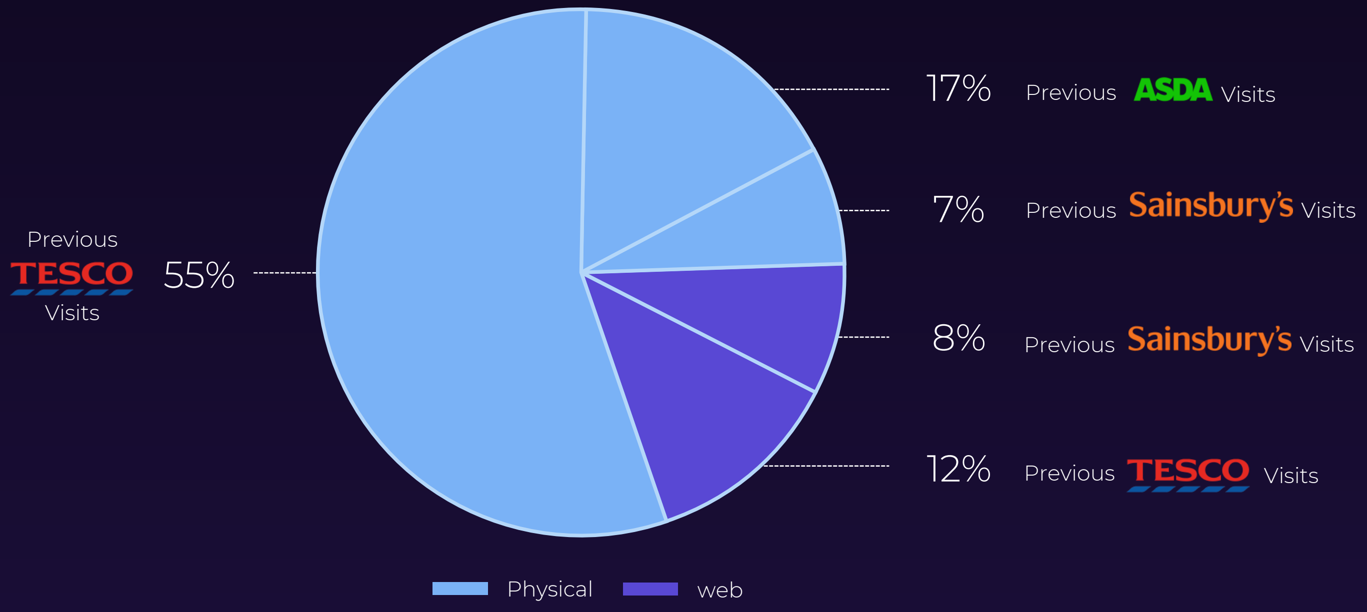
Sample sizes::
Asda New Customers: 2,993 web visitors
Overall Shopping: 6,731 Individuals

- The below table compares users who visit Asda (only) with users who visit competitors (May also include Asda visitors) and users who visit competitors without visiting Asda.
- SoV was highest for the group visiting Asda, and lowest for the group only visiting competitors. Differences may seem small, but that does suggest that small increases in media delivery will have a noticeable incremental effect on returns.

ASDA

Acquisitions

Asda New Customers Breakdown

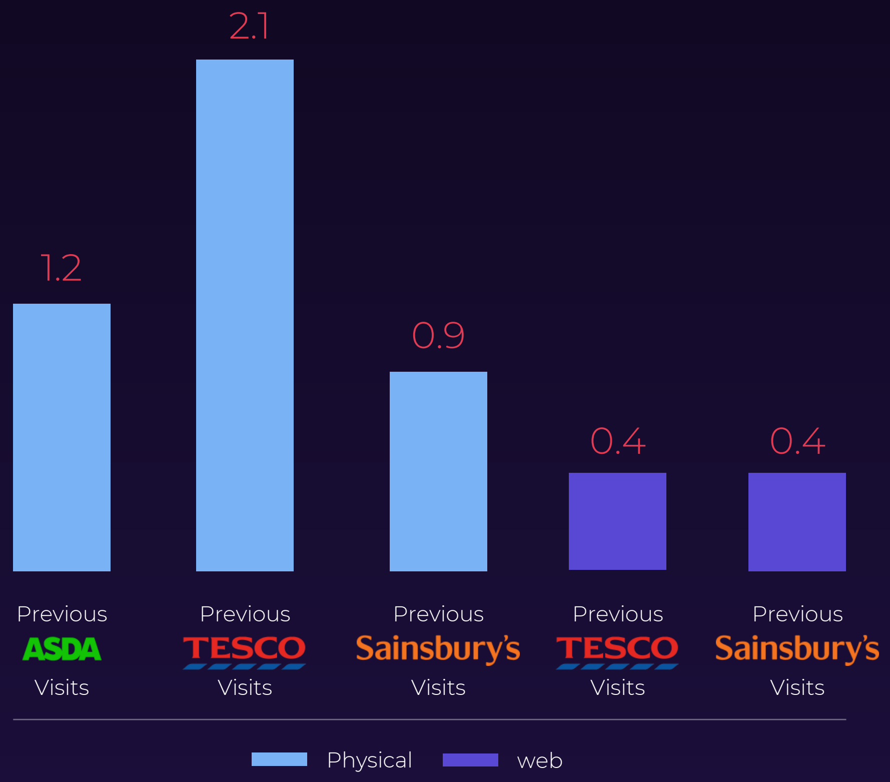


- Here we look at new web visitors to the Asda domain, and where they have been doing their shopping previously.
- The bulk of new customers have previously been shopping in physical Tesco stores.

Sample sizes::
Asda New Customers: 2,993 web visitors
Overall Shopping: 6,731 Individuals

Acquisition Index

Acquisition Index by Previous Shopping Behaviour

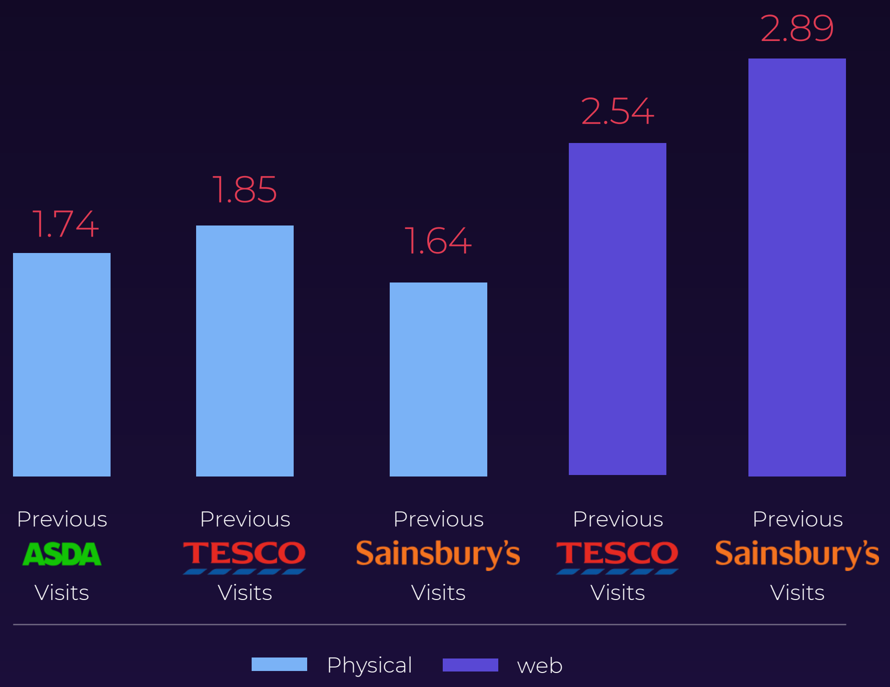


Sample sizes::
Asda New Customers: 2,993 web visitors
Overall Shopping: 6,731 Individuals

- When we index those levels against the general shopping habits, we see that people visiting Asda online for the first time are more than twice as likely as the general population to have been shoppers in physical Tesco stores previously.
- Note that the two web buckets severely under-index. This suggests that making online shopping acquisitions is difficult with consumers who already have a habit of shopping online with a competitor brand.

Required Exposures for Acquisition

Avg Exposures Week Prior by Previous Shopping Behaviour

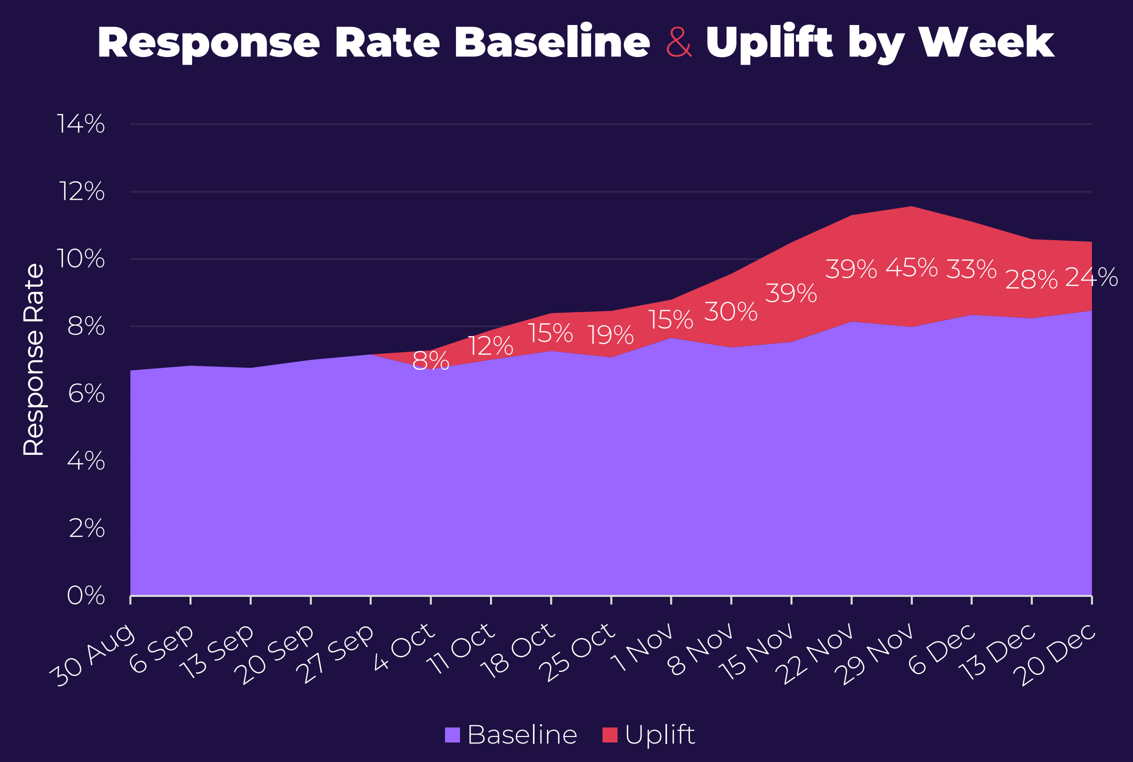


- This is supported by the fact that people who **did** switch from shopping online with either Tesco or Sainsbury's were exposed to far more ads in the week before compared to the three physical shopping groups.
- The Sainsbury's physical shopping group actually saw the lowest number of Asda ads ahead of switching despite not indexing anywhere near as highly as the Tesco physical shoppers.

Sample sizes::
Asda New Customers: 2,993 web visitors
Overall Shopping: 6,731 Individuals

Appendix

TV – Uplift on Web Traffic

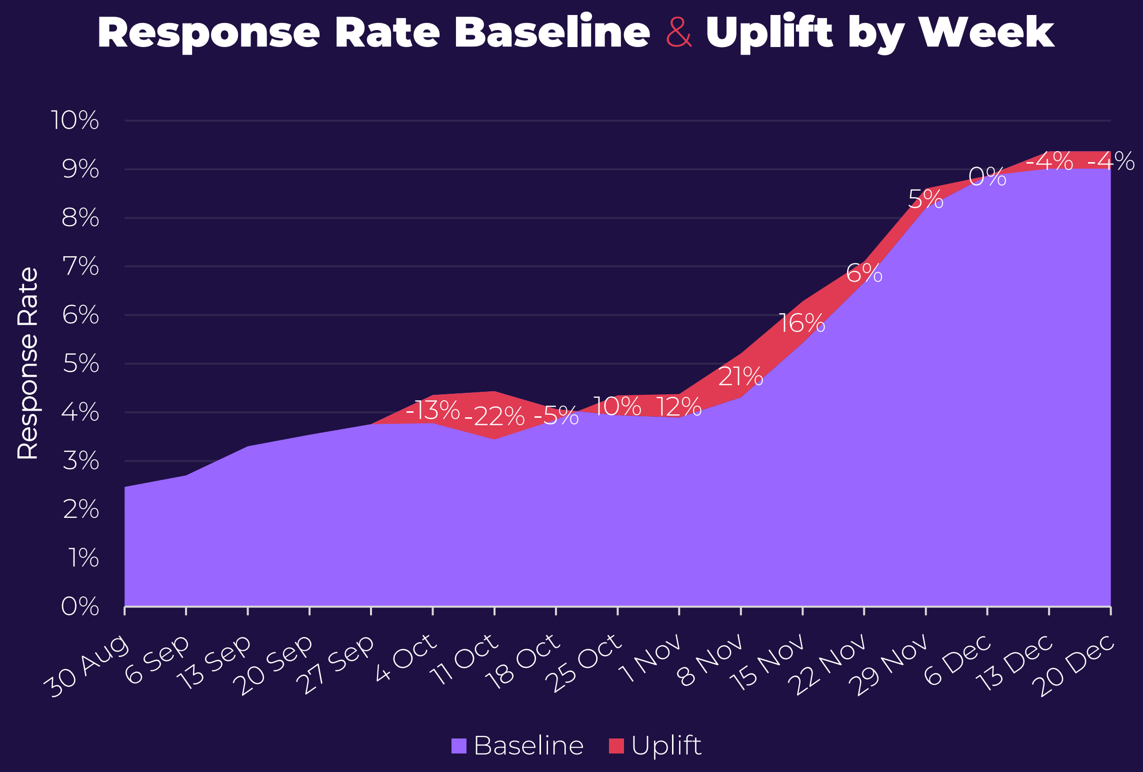


Sample sizes:
Exposed: 1,046 Users
Non-Exposed: 1,046 Users

Total Uplift	174%
Impacts	1,358,689,000
Uplift per 10M Impacts	**1.3%**

TESCO

TV – Uplift on Footfall

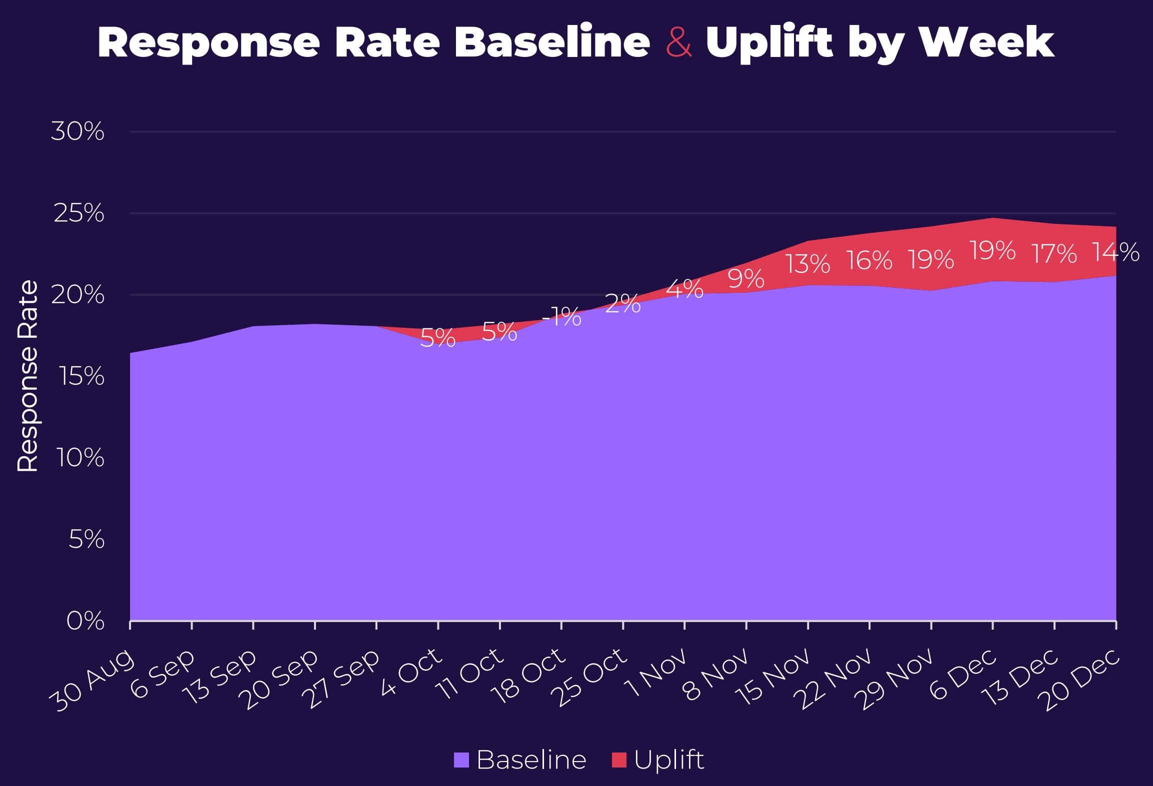


Sample sizes:
Exposed: 1,046 Users
Non-Exposed: 1,046 Users

Total Uplift	25%
Impacts	1,358,689,000
Uplift per 10M Impacts	**0.2%**

TESCO

TV – Uplift on App Usage

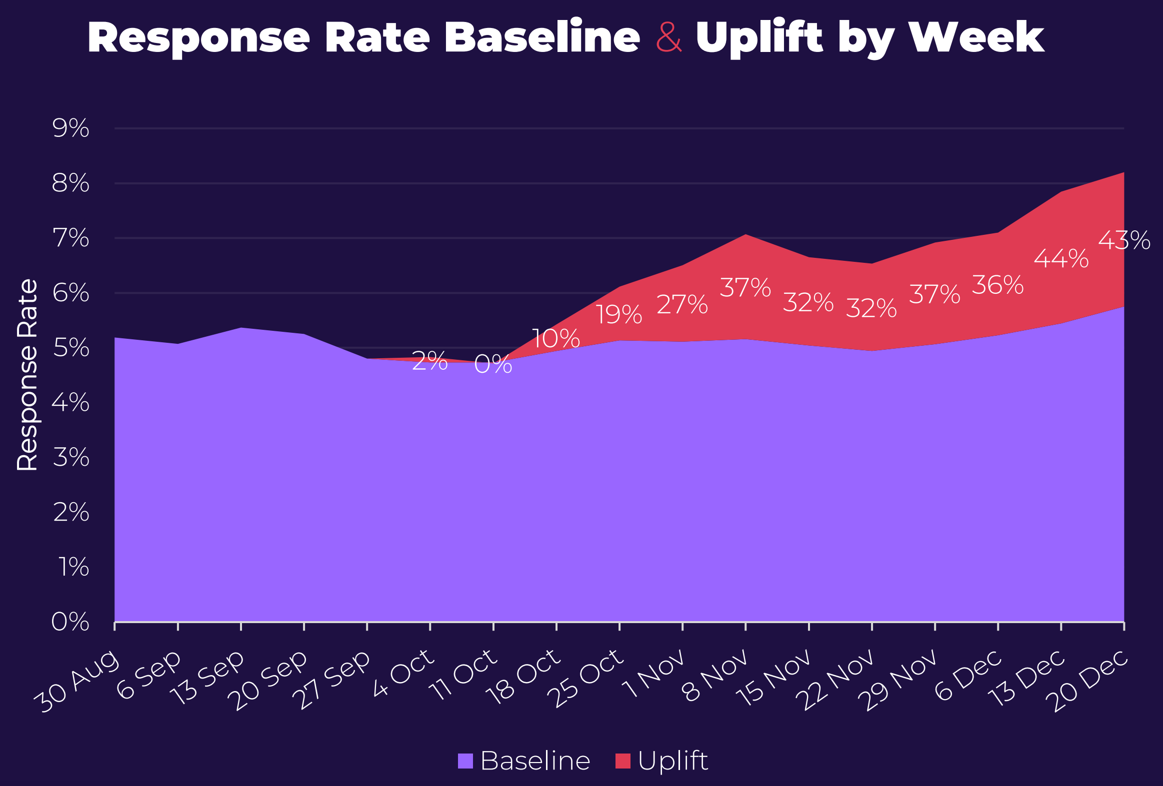


Sample sizes:
Exposed: 1,046 Users
Non-Exposed: 1,046 Users

Total Uplift	52%
Impacts	1,358,689,000
Uplift per 10M Impacts	**0.4%**

TESCO

TV – Uplift on Web Traffic

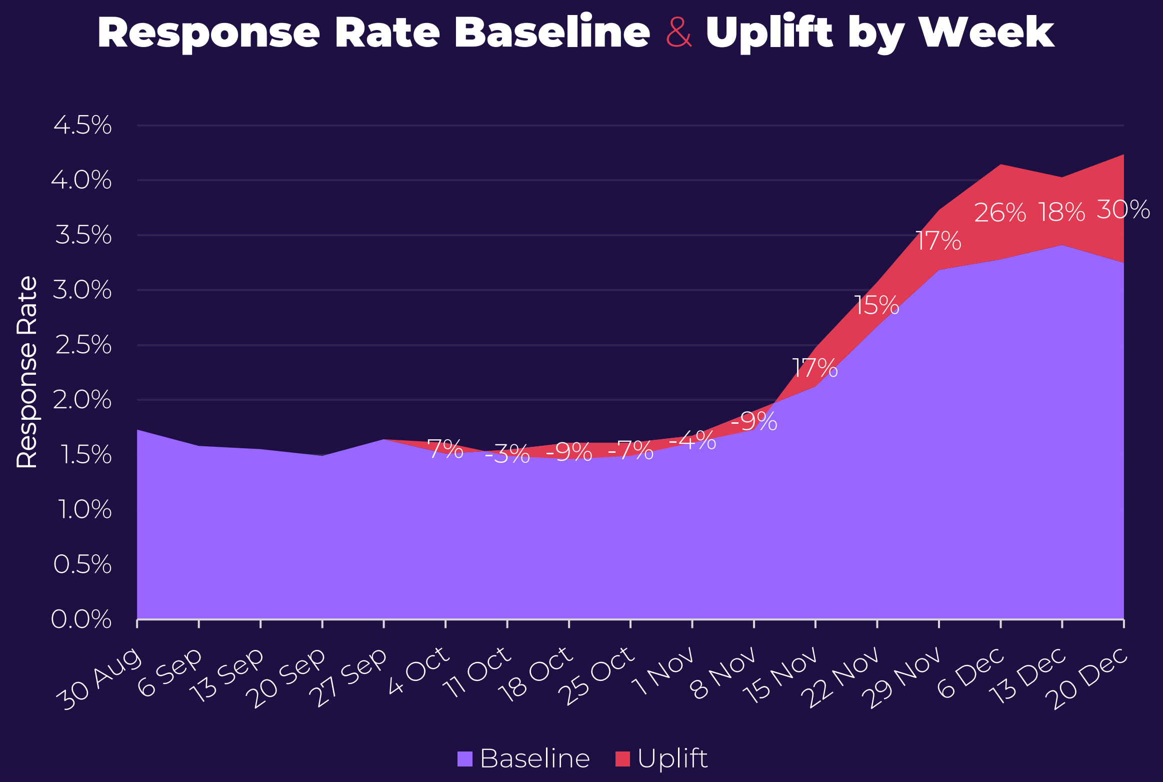


Sample sizes:
Exposed: 838 Users
Non-Exposed: 1,254 Users

Total Uplift	159%
Impacts	428,079,400
Uplift per 10M Impacts	**3.7%**

Sainsbury's

TV – Uplift on Footfall



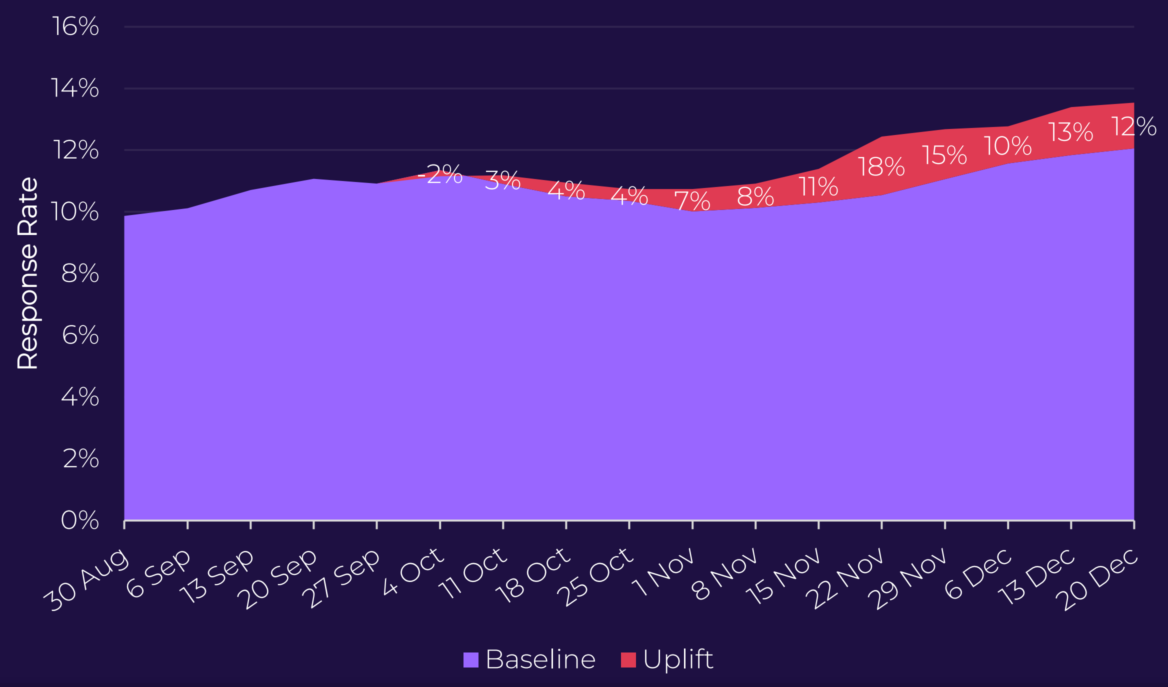
Sample sizes:
Exposed: 838 Users
Non-Exposed: 1,254 Users

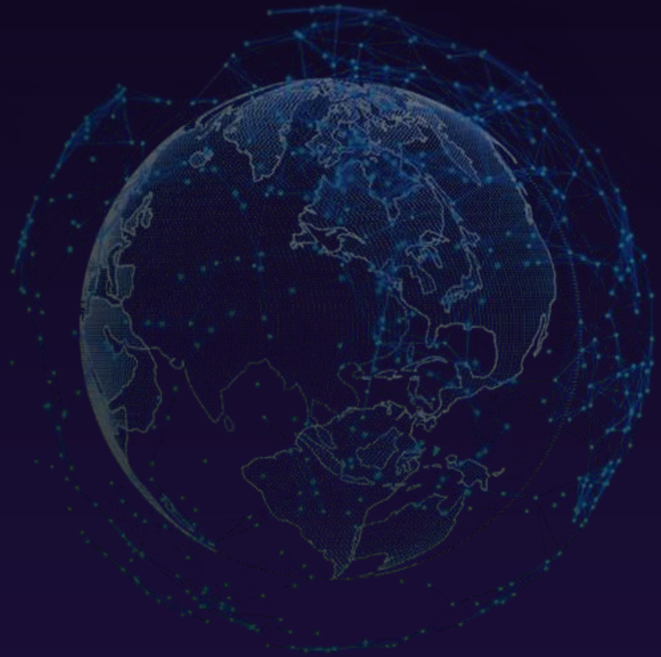
Total Uplift	6%
Impacts	428,079,400
Uplift per 10M Impacts	**0.1%**

Sainsbury's

TV – Uplift on App Usage

Response Rate Baseline & Uplift by Week



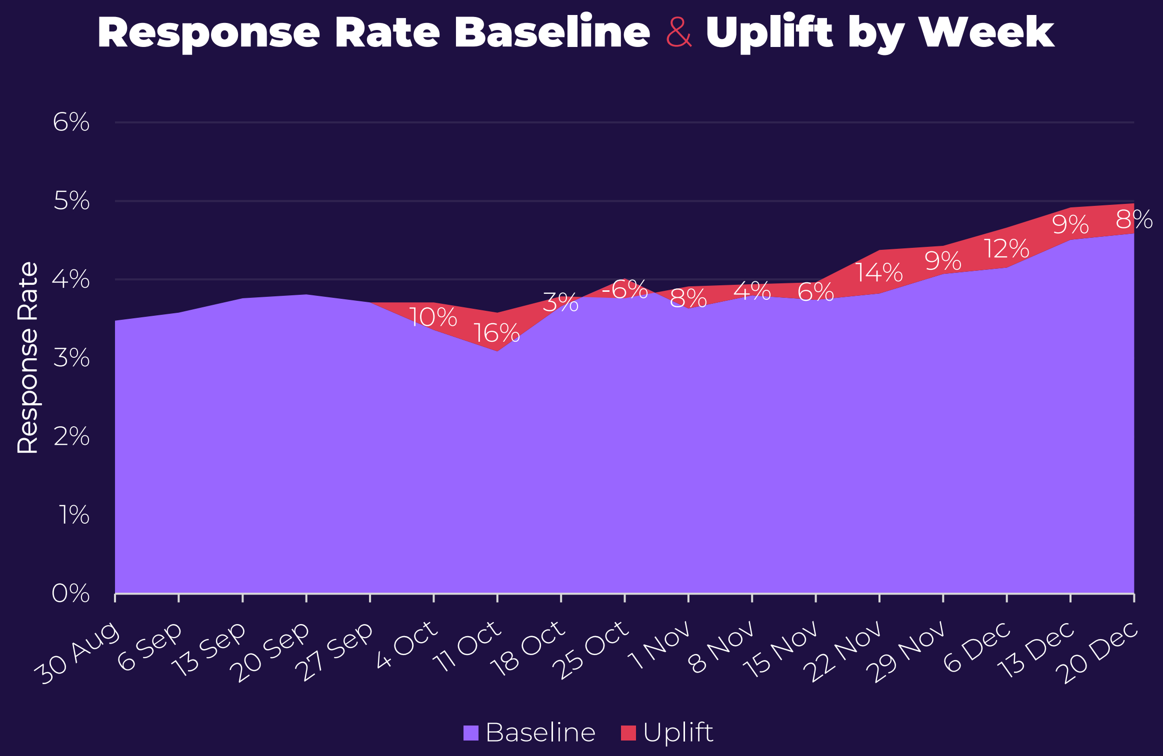


Sample sizes:
Exposed: 838 Users
Non-Exposed: 1,254 Users

Total Uplift	52%
Impacts	428,079,400
Uplift per 10M Impacts	**1.2%**

Sainsbury's

TV – Uplift on Web Traffic



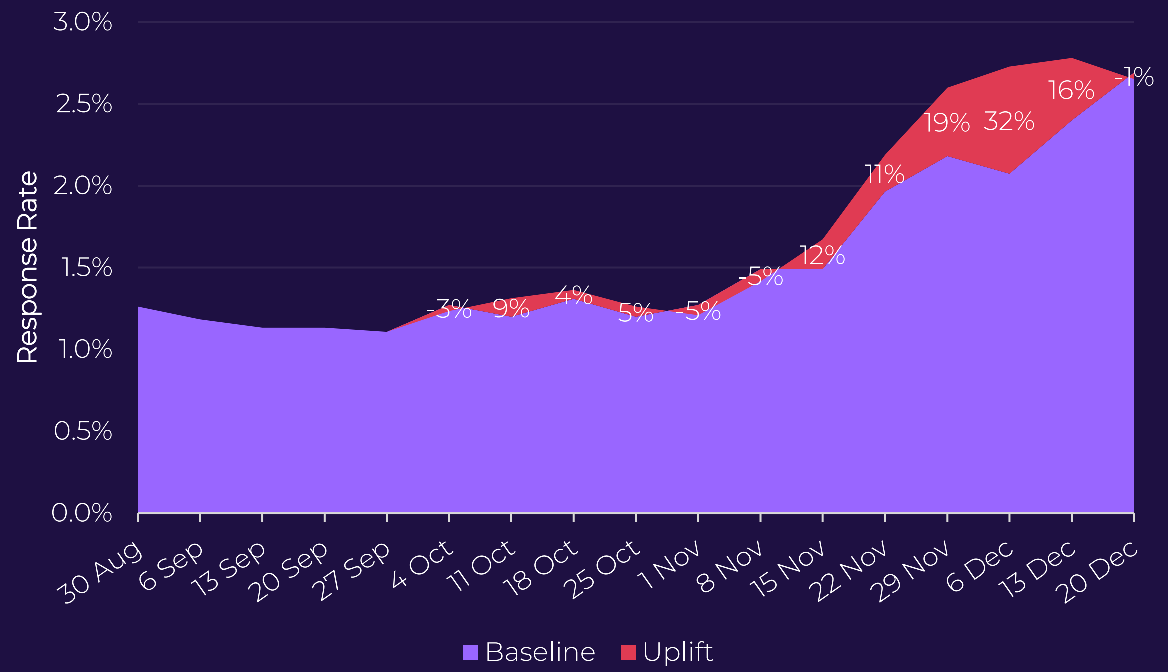
Sample sizes:
Exposed: 971 Users
Non-Exposed: 1,273 Users

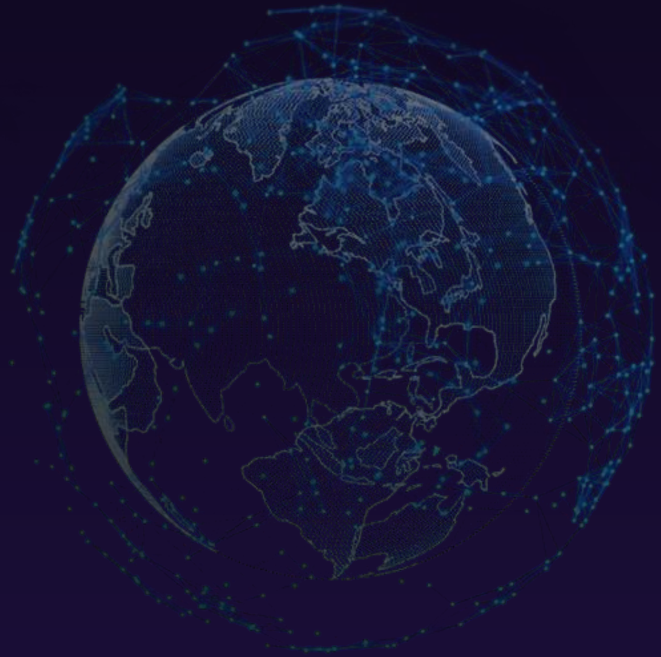
Total Uplift	55%
Impacts	511,802,400
Uplift per 10M Impacts	**1.1%**

Morrisons
Since 1899

TV – Uplift on Footfall

Response Rate Baseline & Uplift by Week





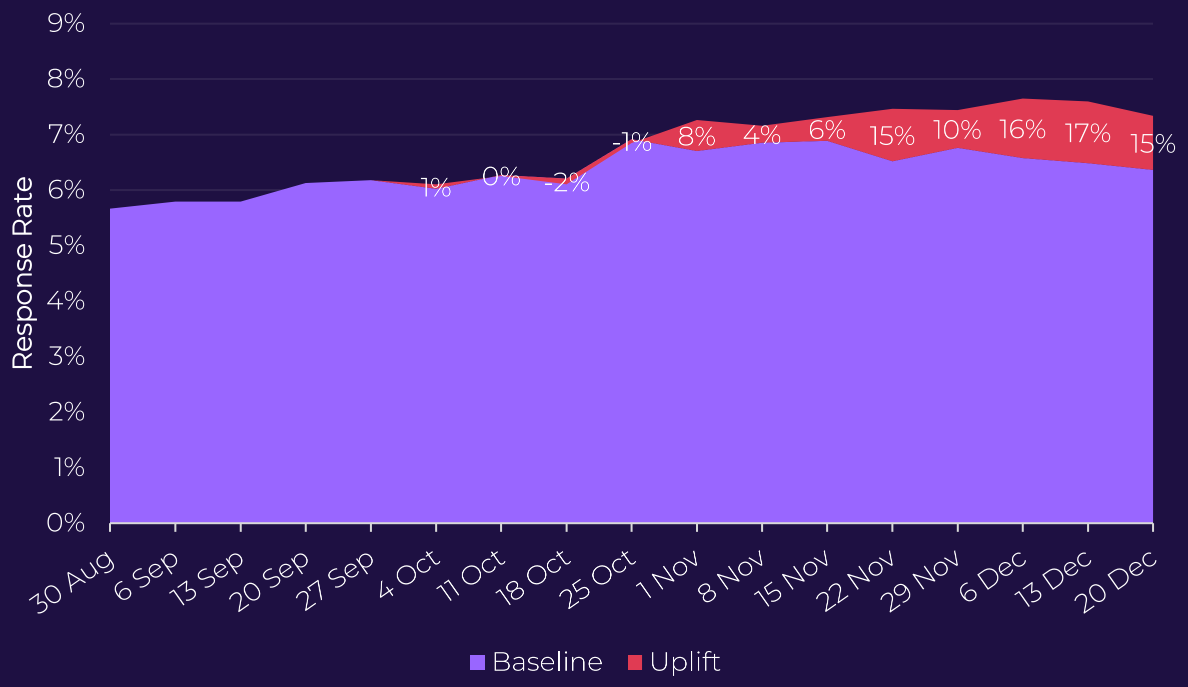
Sample sizes:
Exposed: 971 Users
Non-Exposed: 1,273 Users

Total Uplift	30%
Impacts	511,802,400
Uplift per 10M Impacts	**0.6%**

Morrisons
Since 1899

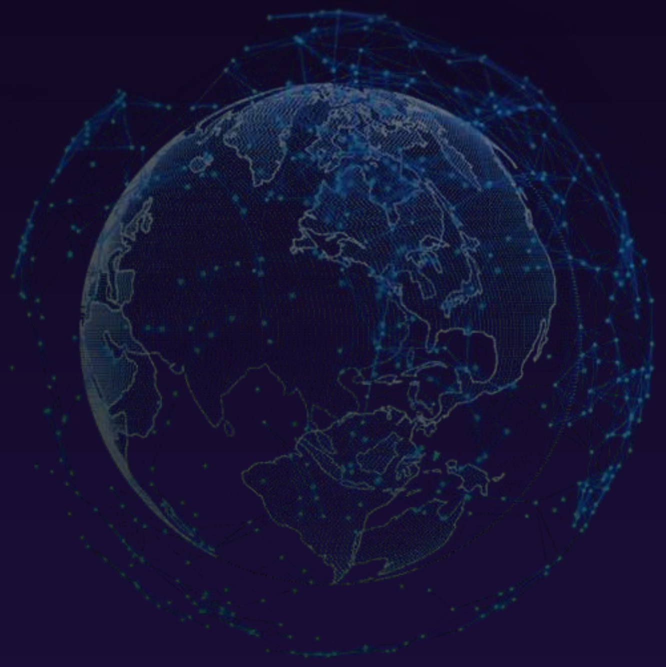
TV – Uplift on App Usage

Response Rate Baseline & Uplift by Week



Sample sizes:
Exposed: 971 Users
Non-Exposed: 1,273 Users

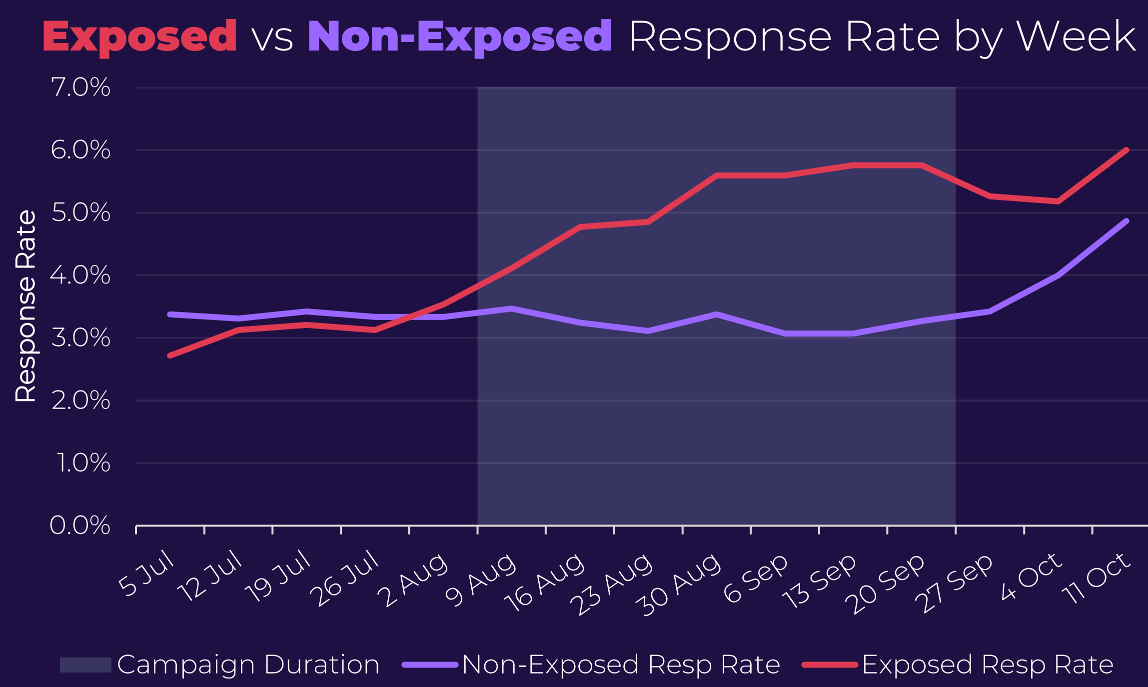
Total Uplift	32%
Impacts	511,802,400
Uplift per 10M Impacts	**0.6%**



Morrisons
Since 1899

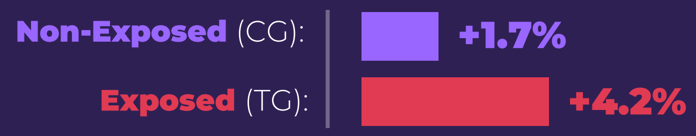
Online - Test vs Control Pattern

Dummy Data



- Once ViewersLogic's pixel is deployed on the online creatives, the analysis will also show the uplift for users who were exposed to the campaign online only.

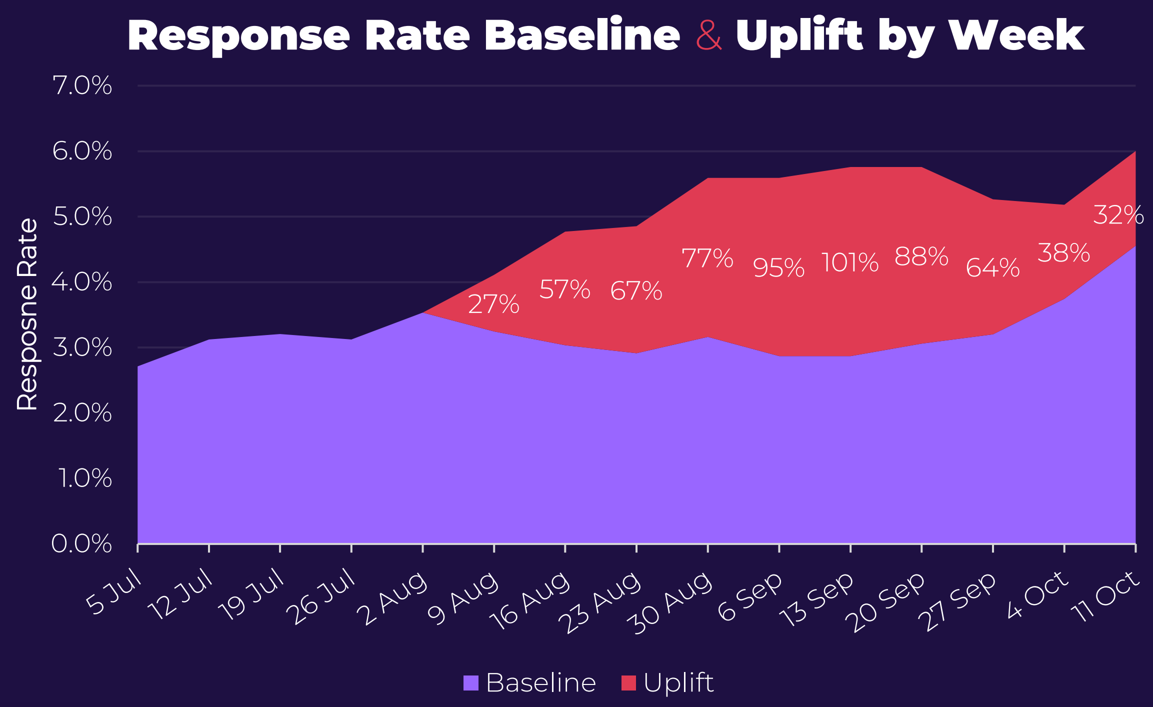
Overall Growth of response rate



Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Online - Uplift

Dummy Data

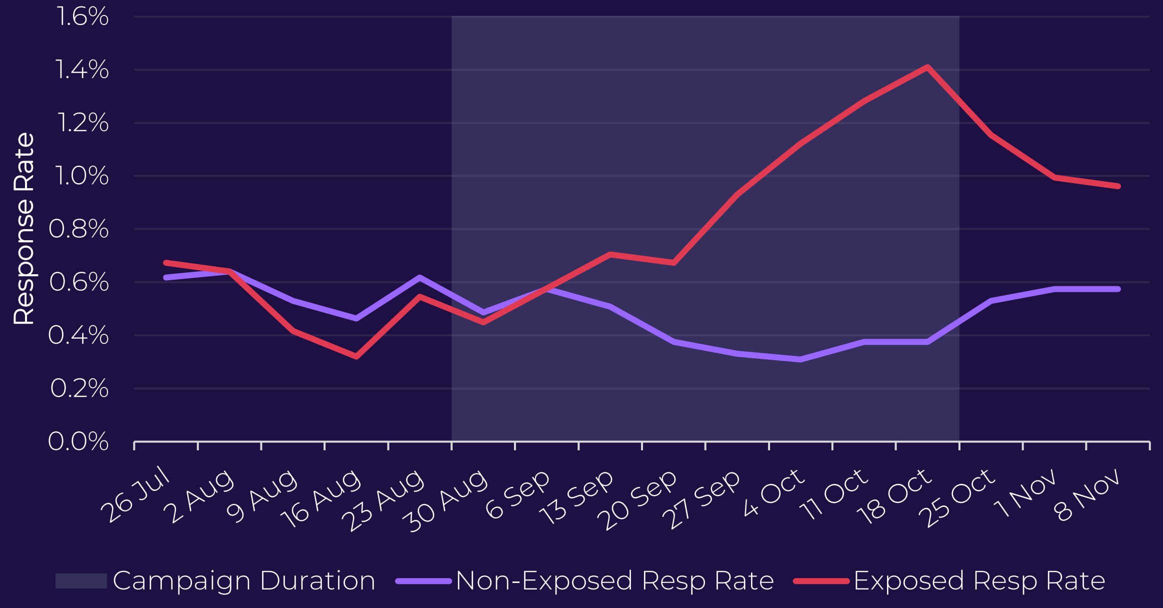


Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Online - Test vs Control Pattern

Dummy Data

Exposed vs **Non-Exposed** Response Rate by Week



- Once the ViewersLogic pixel is deployed on the online creative, the analysis can also show the uplift for users who were exposed to the campaign both online and on TV. This enables brands to create better cross-media strategies.

Overall Growth of response rate

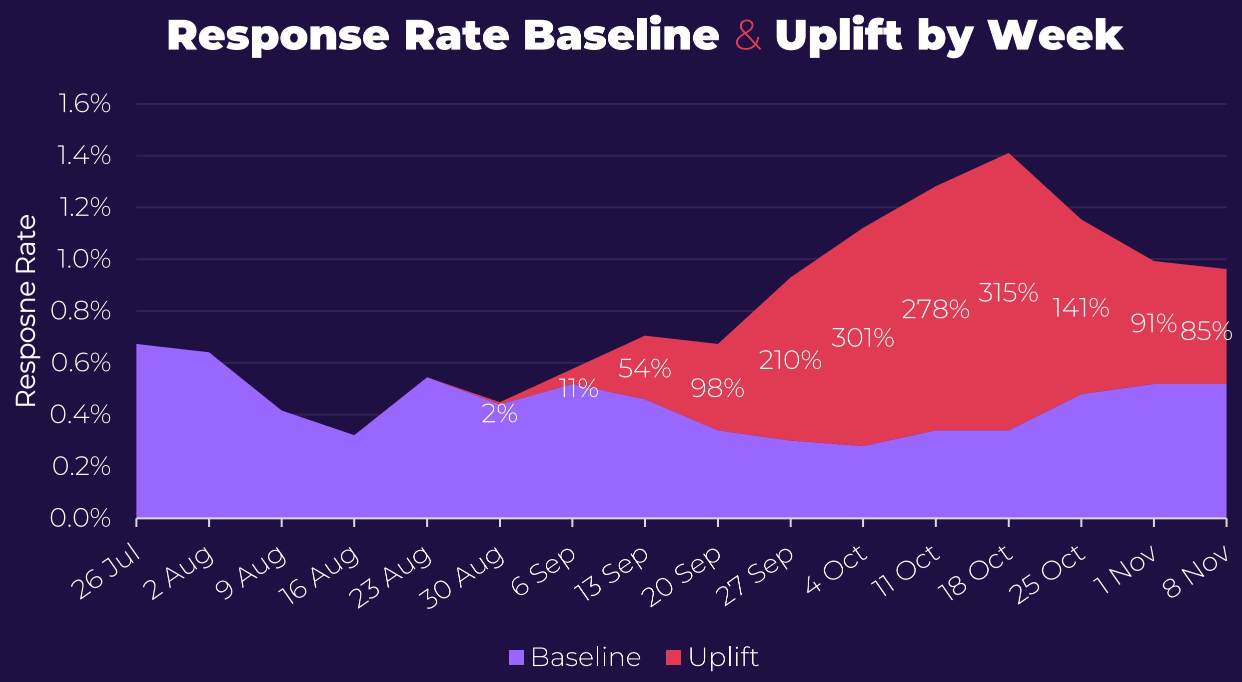
Non-Exposed (CG): **+0.05%**

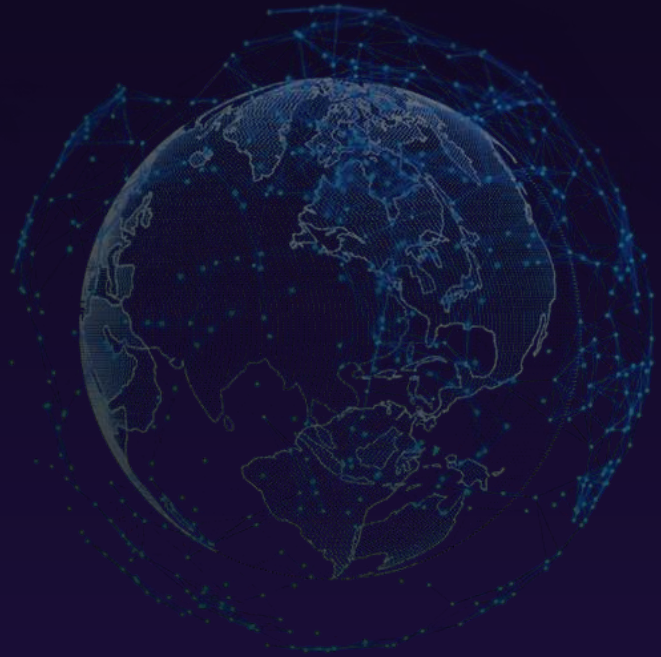
Exposed (TG): **+0.2%**

Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Online + TV - Uplift

Dummy Data



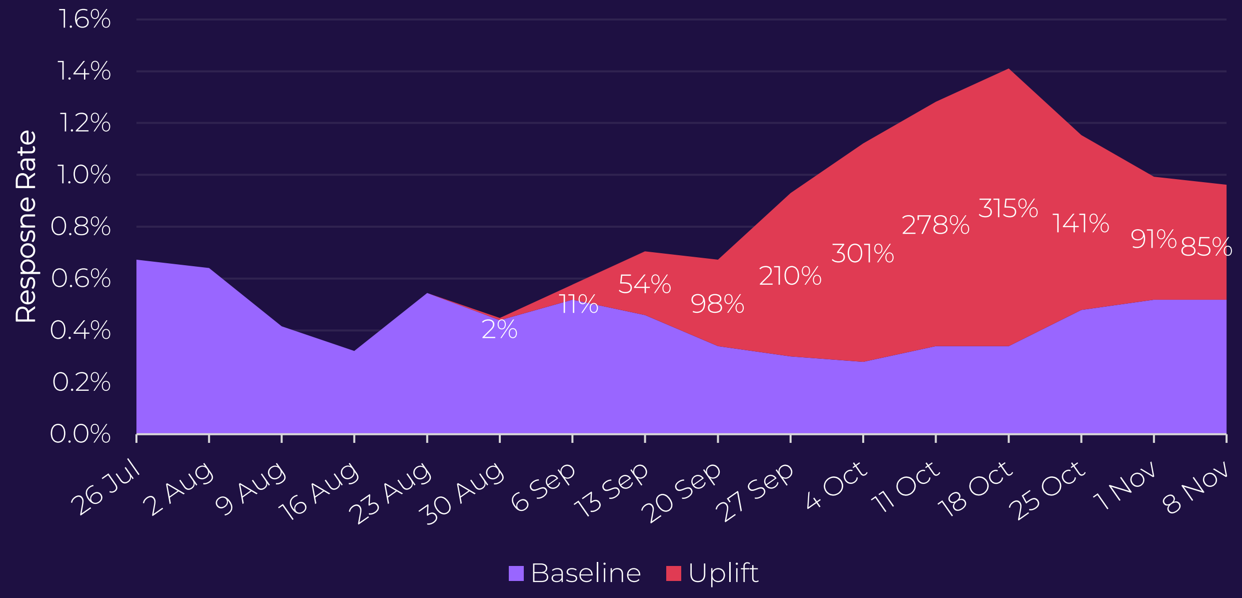


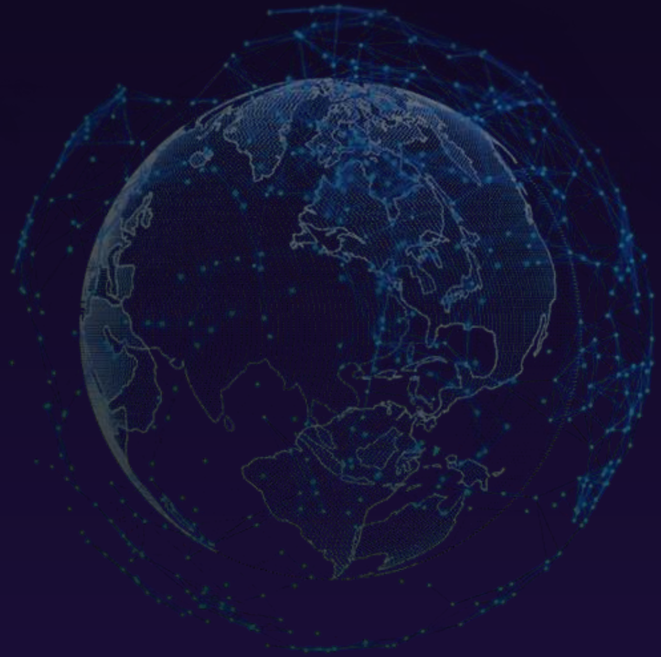
Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Online + TV - Uplift

Dummy Data

Response Rate Baseline & Uplift by Week





Sample sizes:
Exposed: 686 Users
Non-Exposed: 1,065 Users

Thanks!

VIEWERSLOGIC

NielsenIQ

If you have any questions about the report,
feel free to contact us at:
contact@viewerslogic.com