

Signalling Success

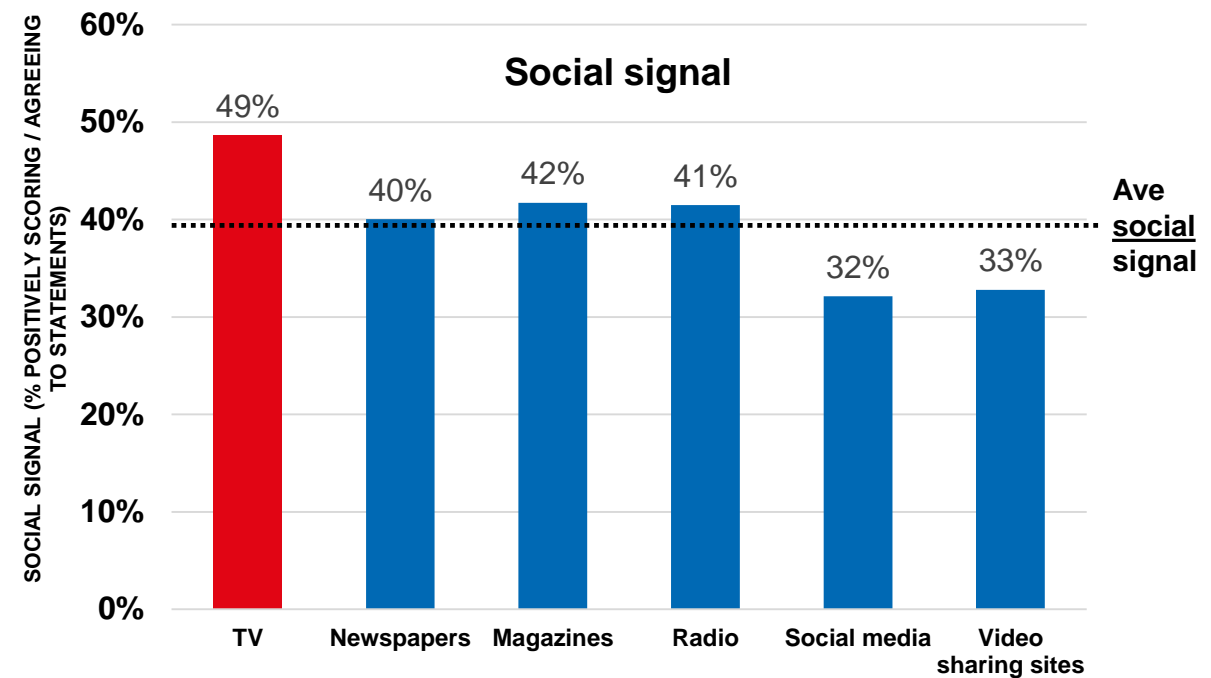
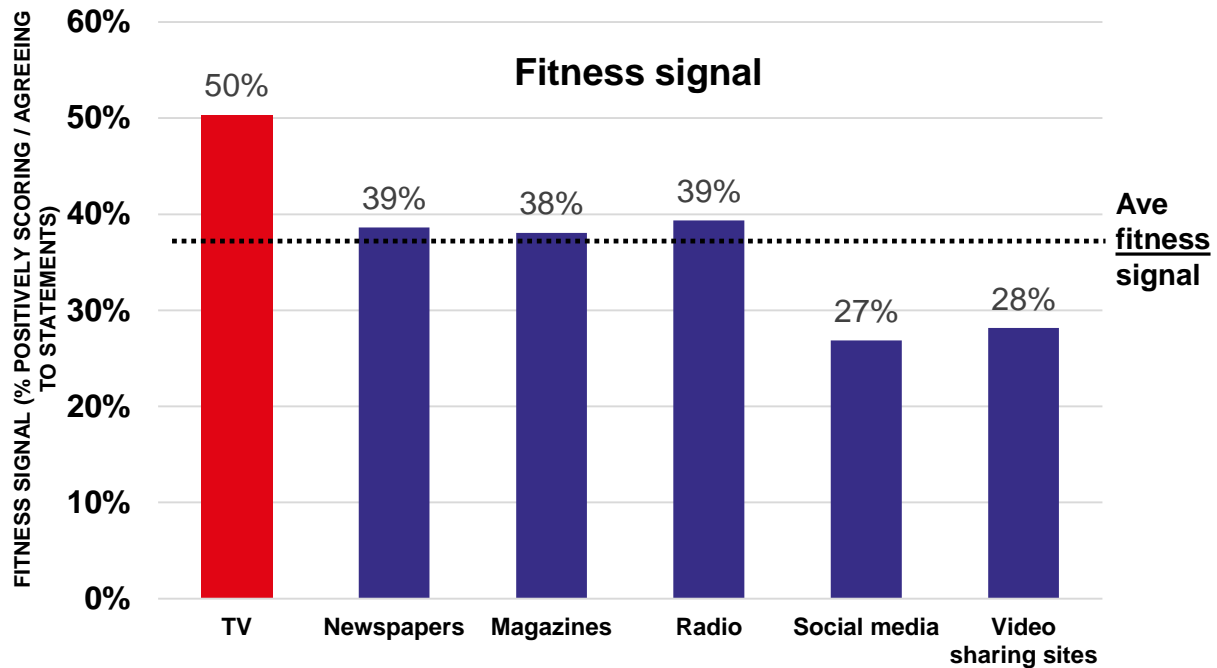


TV ads drive the strongest fitness, social and trust signals

Ad signalling power by media channel (% positively scoring / agreeing to statement) - Adults							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	32%	43%	34%	38%	37%	19%	22%
Financial strength	31%	50%	32%	32%	32%	21%	20%
Confidence	47%	58%	49%	45%	49%	40%	42%
'Fitness' signal average	37%	50%	39%	38%	39%	27%	28%
Well known	44%	52%	44%	44%	48%	40%	38%
Popularity	37%	50%	39%	41%	39%	24%	29%
Success	37%	43%	37%	41%	38%	32%	31%
'Social' signal average	39%	49%	40%	42%	41%	32%	33%
Trust	25%	30%	26%	29%	28%	20%	19%
All measure average	36%	47%	37%	38%	39%	28%	29%

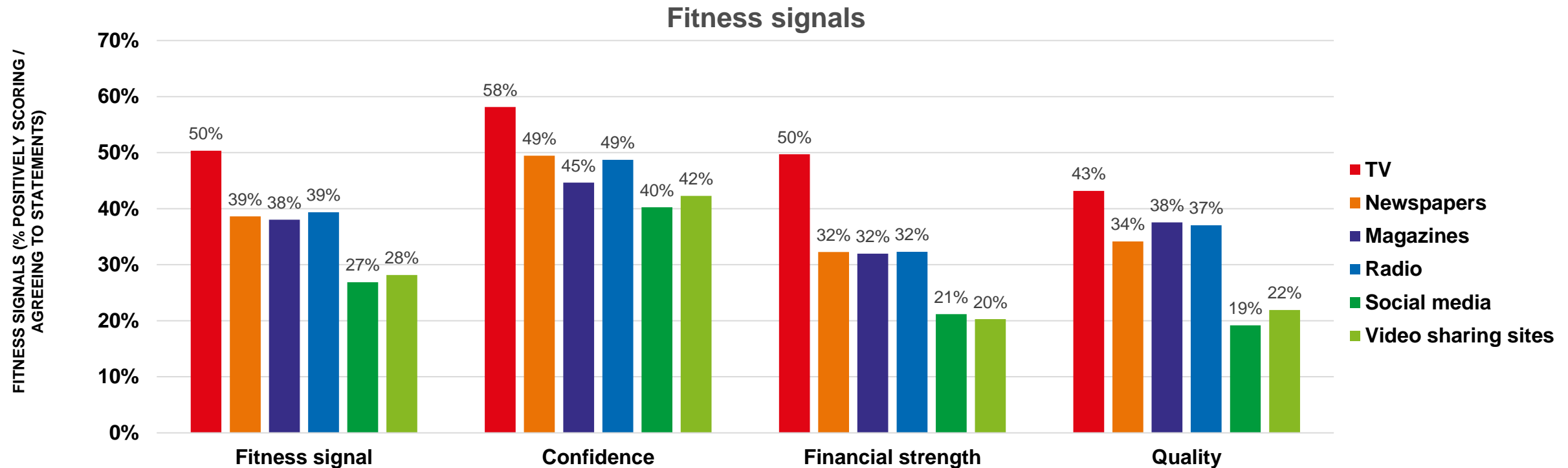
Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

TV drives strongest fitness & social signals



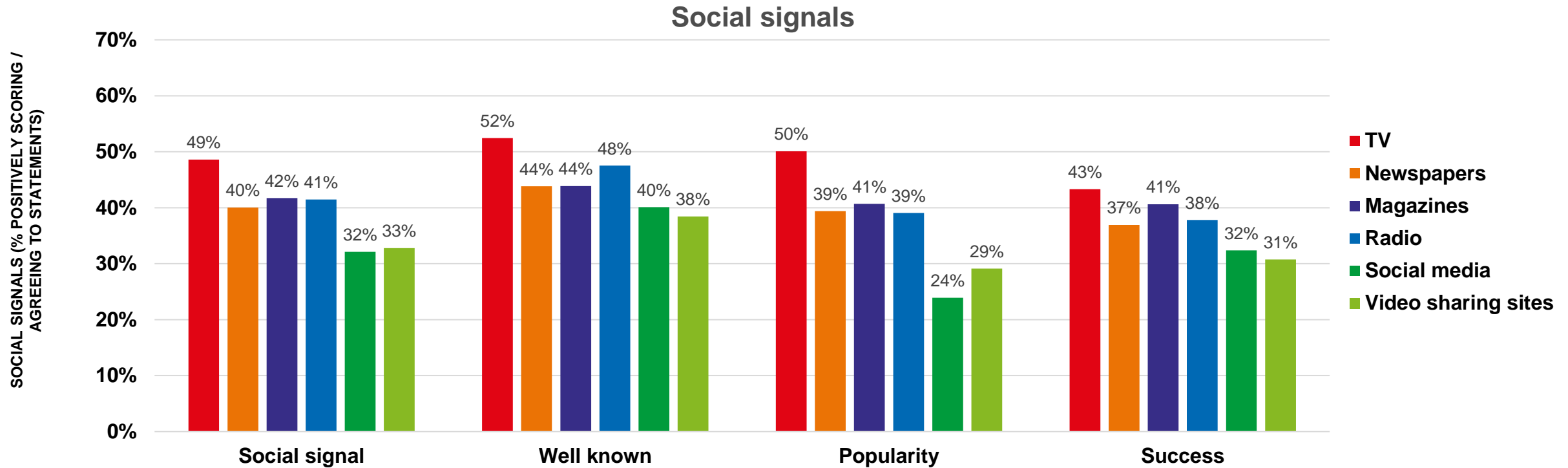
Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

TV ads deliver quality, self-confidence and strength signals



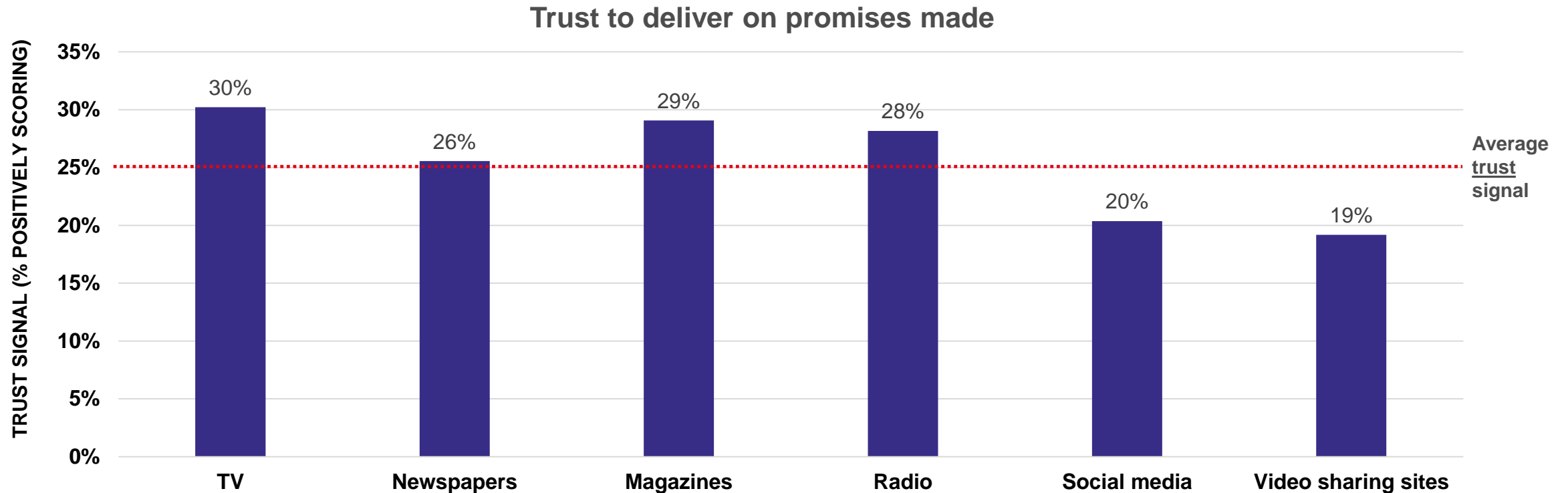
Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

TV ads drive the strongest popularity and success signals



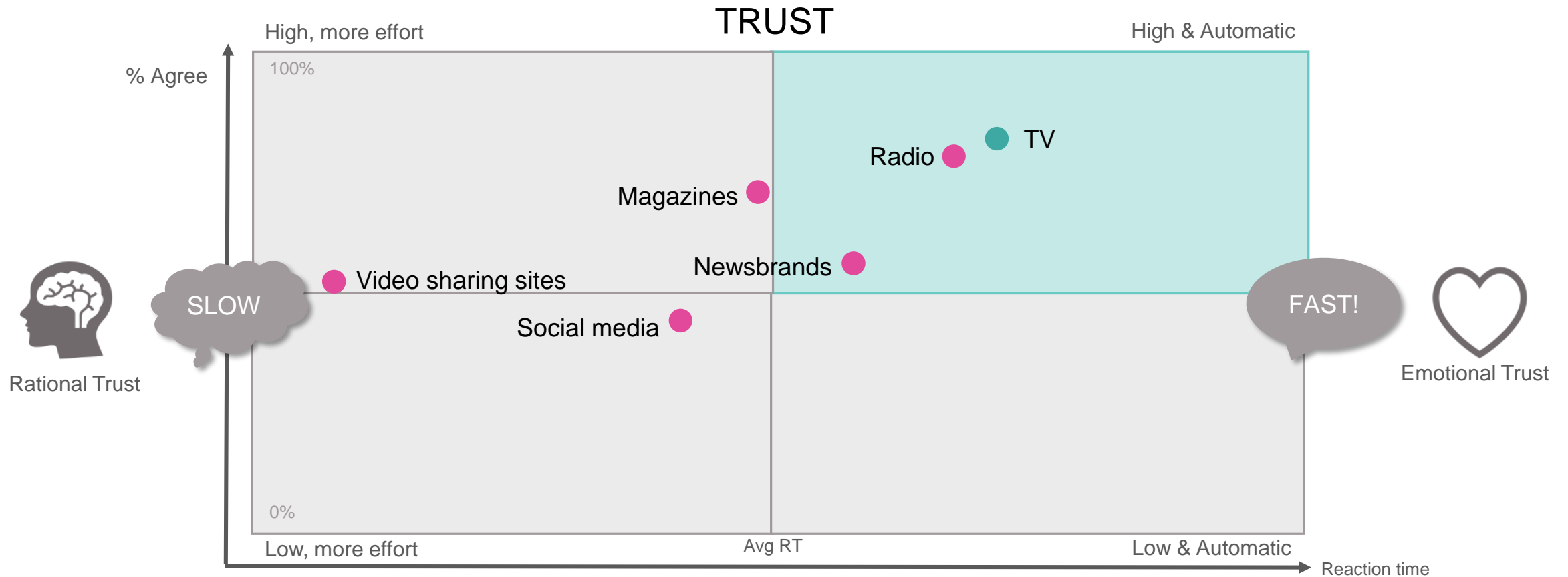
Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

TV, magazines & radio deliver strongest trust signal



Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654)

TV & radio signal the strongest emotional trust



Source: Signalling Success, 2020, house51/Thinkbox. Base: all adults (3,654). Please see notes for detail on implicit trust calculation.

Ad signalling power by media channel – 16-34s

Ad signalling power by media channel (% positively scoring / agreeing to statement) - 16-34							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	29%	46%	18%	36%	34%	18%	21%
Financial strength	28%	48%	23%	29%	30%	21%	18%
Confidence	40%	55%	38%	38%	40%	34%	38%
'Fitness' signal average	33%	50%	26%	34%	35%	24%	25%
Well known	41%	50%	36%	42%	40%	39%	39%
Popularity	41%	57%	35%	42%	42%	32%	37%
Success	39%	48%	31%	40%	38%	37%	38%
'Social' signal average	40%	52%	34%	41%	40%	36%	38%
Trust	24%	33%	18%	27%	27%	23%	17%
All measure average	35%	48%	28%	36%	36%	29%	29%

Source: Signalling Success, 2020, house51/Thinkbox. Base: 16-34

Ad signalling power by media channel – 35-54s

Ad signalling power by media channel (% positively scoring / agreeing to statement) - adults 35-54							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	33%	43%	36%	37%	35%	22%	23%
Financial strength	33%	51%	35%	35%	28%	20%	25%
Confidence	48%	57%	48%	49%	47%	36%	49%
'Fitness' signal average	38%	50%	40%	40%	37%	26%	33%
Well known	46%	55%	47%	46%	50%	39%	40%
Popularity	41%	52%	48%	49%	42%	23%	31%
Success	39%	44%	41%	48%	38%	31%	31%
'Social' signal average	42%	51%	45%	48%	43%	31%	34%
Trust	25%	30%	27%	29%	26%	18%	22%
All measure average	38%	48%	40%	42%	38%	27%	32%

Source: Signalling Success, 2020, house51/Thinkbox. Base: 35-54

Ad signalling power by media channel – 55+

Ad signalling power by media channel (% positively scoring / agreeing to statement) - adults 55+							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	34%	41%	46%	39%	41%	18%	22%
Financial strength	33%	50%	37%	31%	38%	22%	18%
Confidence	53%	62%	60%	47%	57%	50%	40%
'Fitness' signal average	40%	51%	48%	39%	45%	30%	26%
Well known	46%	52%	47%	44%	51%	42%	37%
Popularity	31%	42%	35%	32%	34%	18%	21%
Success	34%	39%	39%	34%	38%	29%	25%
'Social' signal average	37%	44%	41%	37%	41%	30%	28%
Trust	27%	29%	31%	31%	31%	20%	19%
All measure average	37%	45%	42%	37%	41%	29%	26%

Source: Signalling Success, 2020, house51/Thinkbox. Base: 55+

Ad signalling power by media channel – online retail

Ad signalling power by media channel (% positively scoring / agreeing to statement) - online retail							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	35%	44%	39%	44%	44%	18%	22%
Financial strength	34%	52%	33%	39%	38%	18%	20%
Confidence	51%	58%	58%	50%	52%	41%	49%
'Fitness' signal average	40%	51%	44%	45%	45%	26%	30%
Well known	50%	59%	44%	52%	54%	50%	44%
Popularity	40%	55%	40%	45%	43%	26%	32%
Success	44%	52%	43%	45%	43%	40%	39%
'Social' signal average	45%	55%	43%	48%	47%	39%	38%
Trust	30%	36%	29%	35%	33%	24%	24%
All measure average	41%	51%	41%	45%	44%	31%	33%

Source: Signalling Success, 2020, house51/Thinkbox. Base: online retail

Ad signalling power by media channel – FMCG

Ad signalling power by media channel (% positively scoring / agreeing to statement) - FMCG							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	32%	46%	32%	41%	38%	18%	17%
Financial strength	30%	53%	30%	29%	29%	20%	19%
Confidence	45%	58%	44%	47%	47%	37%	39%
'Fitness' signal average	36%	52%	36%	39%	38%	25%	25%
Well known	38%	43%	42%	38%	45%	31%	30%
Popularity	33%	43%	41%	38%	34%	22%	21%
Success	31%	35%	32%	39%	36%	23%	23%
'Social' signal average	34%	40%	38%	38%	38%	25%	25%
Trust	23%	26%	24%	28%	28%	17%	17%
All measure average	33%	43%	35%	37%	37%	24%	24%

Source: Signalling Success, 2020, house51/Thinkbox. Base: FMCG

Ad signalling power by media channel – mobile phone network

Ad signalling power by media channel (% positively scoring / agreeing to statement) - mobile network							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	32%	45%	29%	35%	39%	21%	26%
Financial strength	31%	50%	31%	30%	30%	25%	23%
Confidence	46%	63%	43%	37%	50%	47%	38%
'Fitness' signal average	37%	52%	35%	34%	40%	31%	29%
Well known	47%	61%	44%	44%	45%	45%	44%
Popularity	39%	56%	38%	39%	39%	24%	35%
Success	41%	51%	41%	41%	38%	39%	36%
'Social' signal average	42%	56%	41%	41%	41%	36%	38%
Trust	27%	37%	26%	26%	31%	24%	20%
All measure average	38%	52%	36%	36%	39%	32%	32%

Source: Signalling Success, 2020, house51/Thinkbox. Base: mobile phone network

Ad signalling power by media channel – home insurance

Ad signalling power by media channel (% positively scoring / agreeing to statement) - home insurance							
Signal	Average	TV	Newspapers	Magazines	Radio	Social Media	Video sharing
Quality	29%	38%	36%	30%	27%	19%	22%
Financial strength	30%	44%	34%	30%	32%	21%	20%
Confidence	46%	53%	52%	43%	46%	37%	42%
'Fitness' signal average	35%	45%	41%	35%	35%	26%	28%
Well known	42%	47%	46%	42%	47%	36%	35%
Popularity	36%	47%	38%	40%	40%	24%	28%
Success	32%	37%	31%	37%	35%	28%	25%
'Social' signal average	37%	44%	38%	40%	40%	29%	30%
Trust	21%	22%	23%	28%	21%	17%	16%
All measure average	34%	41%	37%	36%	35%	26%	27%

Source: Signalling Success, 2020, house51/Thinkbox. Base: home insurance