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# Insights Accelerated

Q1 2024



# ▲ Introduction

Welcome to the first Insights Accelerated report of 2024! Q1 saw consumer trends across diversity, sustainability and gaming develop in surprising directions, leading to interesting comparisons with Q4 of last year.

In the diversity space, we saw a spike in audiences feeling represented in advertising in Q1, reversing the trend of them feeling less represented at the end of 2023. This suggests brands can do more to maintain connections with audiences throughout the year.

Q1 also saw large increases in interest in sustainable food and eco-friendly travel, suggesting consumers committing to new year's resolutions.

However, searches for plant-based products dropped, suggesting brands in this space need to rethink their advertising strategies to maintain cut-through.

In gaming and tech, we saw a swell of interest for the launch of Fallout, a TV series based on the video game series of the same name, as well as anticipation for a summer of eSports tournaments to rival the Olympics themselves.

These are just some of the highlights from our Q1 report, which takes a deep dive into diversity, sustainability and gaming and tech.

Read on to find out more!



Diversity



Gaming & Tech



Sustainability



# ▲ Diversity

Diversity in advertising has never been more important - our Q2 2023 report found [57% of UK adults said they stopped engaging with media channels due to inadequate diversity](#) - but are brands doing enough to address diversity in their campaigns and is this getting through to consumers?

We've surveyed diverse groups within the UK - including Black, Asian and minority ethnic, LGBTQ+, and Neurodivergent individuals - to understand how well represented they feel in advertising and what they expect from brands.







▲ Insight #1

## Representation spikes in January and February

We looked at how well represented people feel by advertising across the year and there are some noticeable variations. Audiences feel represented by advertising in January, but this drops down to just 16% in September and October.

There are a lot of factors that could explain this, including ad fatigue over summer as well as customers just having a fresh perspective in January. Additionally, categories on air during that time could play a role. Travel (which dominates January advertising and sees double the average advertising spend of any other month in the year) is generally considered to be more representative by respondents.

The health and fitness category is a heavy advertiser in January and has been doing a lot over the past few years to be far more diverse which may also help to drive the Q1 spike.

▲ Implication #1

## Brands need to maintain the momentum

With January and February being the highest months for representation, brands have an opportunity to keep that running throughout the year.

Brands that think about diversity outside of some of the typical seasonal moments have a greater opportunity to stand out from the crowd.

While there are obvious cultural moments to target, there are also year-round opportunities to connect with diverse communities.





▲ Insight #2

## TV adverts drive representation in Q1

We've talked about how TV often comes out on top in terms of customers feeling represented by the adverts they see. This trend continues throughout the year with TV maintaining the lead across all months.

What is notable, however is that TV really pulls ahead in December – February, rising from half of people feeling represented by the ads they see on TV in September up to 62% in January and February, the highest of any channel for any month.

Interestingly, Facebook and YouTube are both much more consistent across the year with Facebook only going from 50% in September to 54% in January.

▲ Implication #2

## TV has space to be even more representative

We believe that the reason YouTube and Facebook adverts are more consistent across the year is that they are built upon platforms that can run campaigns of any size and target any audience.

That means that there are far more “always on” campaigns that reach diverse communities. At the same time, TV is not built this way.

Generally, campaigns are seasonal and this is likely what causes this surge in December and Q1, when brands often launch big campaigns.

If we could bring the same level of attention to the September – October months, TV might become even more representative.

▲ Insight #3

## Advertisers are overlooking broader demographics on TikTok

Most audiences feel represented by the ads they see on TikTok, but there are two notable exceptions. C2DEs and over 55s.

While a 62% majority of 18-34s feel represented by the ads they see on TikTok in January (the highest of the year), only a small proportion (12%) of 55+s and 30% of C2DEs feel represented during this time (the lowest of the year).

January is typically when lots of brands advertise travel, health and fitness and furniture. Our hypothesis is that the ads on TikTok during this time are frequently made to feel young and upmarket, which is ignoring certain audiences.

▲ Implication #3

## A window of opportunity on TikTok for inclusive brands

TikTok's phenomenal growth means it has audiences of all ages and circumstances.

There are over 1.7m adults over 55 on TikTok, a sixfold growth since 2021. Brands are perhaps assuming that that TikTok is just for younger customers, which is no longer the case. Brands that think about all ages and demographics in their TikTok adverts have a chance to really stand out, especially in January.

This is a fantastic opportunity to subvert norms, particularly for the categories that advertise heavily in January as a brand could be one of only a few brands in travel, health or furniture on TikTok that are talking to an audience that everyone else is ignoring.





## ▲ Gaming & Tech

Everyone seems desperate to explore gaming and its associated new technologies, but what does the larger world think of things, should brands engage and how should they start to establish a presence?

We've analysed sentiment using **Social Sparks**, our proprietary social listening tool that analyses data from across the digital landscape, to take the pulse of the nation.





▲ Insight 1

## From rave reviews to microtransaction mayhem

A sequel to a cult classic game from 2012, Dragon's Dogma II delivered strong review scores in the lead up to its release in March, delivering a high critic score of 86/100 on Metacritic.

However, on the release date, secret microtransactions – further sales within the game – were announced to players.

With the game as an entirely single player experience, this sparked a furious response from gamers who saw it as monetising a space that should remain free, our tool for analysing social trends saw a 112% surge in posts and discussion around gaming with both positives and negatives doubling.

▲ Implication 1

## Consumers vote with their wallets

Despite the controversy, the game released to strong sales figures, selling 2.5 million copies in just 11 days.

It remains unclear as to whether introducing these microtransactions has been counter-productive to the game's launch. It seems that even with controversy, quality remains king and delivers on sales for the product.

Given the overall success of this launch, this could be yet another step on the way to a new normal for brands to leverage this opportunity by partnering with games studios and content.







▲ Insight 2

## Brands ride the IP wave, revolutionising entertainment business models

Anticipation for the Fallout show on Amazon Prime reached fever levels at the end of Q1, highlighting the power of gaming IP.

Prime have put this forward as a major focus in their content calendar hoping to drive interest from an endemic player base and those who know the series.

However, this has also had the subsequent effect of raising interest in the series itself, with Xbox running a competition for a console and controller based on the new show, driving a 3,224% increase in mentions and 28m global impressions on the day of announcement.

▲ Implication 2

## Strong moments for brands are based on beloved IP and ideas

Brand events take cross-media interest a step further with Samsung partnering with Amazon for a launch event at Samsung KX (their experiential store) bridging the gap between the game and the show with an experience brought to life.

As we see more and more movies and TV shows brought out and entertainment properties living as format agnostic, there will be increasing ways to take advantage and innovate around this.

This is a good reminder of how experiential is a great way to engage with a fanbase, while social media ads help to amplify the event beyond those who have visited it.

▲ Insight 3

## 2024: The Summer of sport Esports!

As anticipation builds for the first ever Esports World Cup tournament this July – we've seen a 12% increase in mentions – there's a palpable sense of excitement within the gaming community and beyond.

With each passing year, Esports has steadily ascended to new heights, capturing the attention of millions worldwide.

The potential for the Esports World Cup to rival the stature of iconic sporting events like the UEFA European Football Championship one day may have been far-fetched, but we're seeing it become increasingly conceivable.

▲ Implication 3

## Make your mark on the World Cup stage

The Esports World Cup offers an electrifying opportunity for brands to dive into the heart of gaming culture, engaging with a dynamic and passionate global audience.

With its soaring popularity, Esports has become a powerhouse in entertainment, captivating millions around the world. Brands that seize the chance to join the Esports frenzy can forge deep connections with consumers through exhilarating sponsorships, immersive activations, and cutting-edge marketing campaigns.

As the Esports landscape continues to evolve, brands have a huge opportunity to leverage in-game advertising that helps them augment the action without interrupting it.





# ▲ Sustainability

There is often a disconnect between what people say and what they do. While sustainability is a key concern for consumers when they are polled, do we see the same level of interest when they are searching for key purchases?

Using, **Intent Based Planning**, a Publicis Media tool that applies semantic analysis to Google search data, we've examined how sustainability concerns are influencing people's buying behaviours.





▲ Insight 1

## New year, more healthy habits

As we know, the new year is a time for starting new habits, and our insights show a growth in sustainable food interest, with a 16% increase in searches in this category across Q1 2024 vs Q1 2023.

In the same way that Q4 is coined as the tech adoption period, Q1 is typically when customers try out different food habits, and that sees a transition into sustainable food choices as the two are inextricably linked.

▲ Implication 1

## Sustainable food interest isn't just for January

Brands should continue riding the sustainable food interest wave and promote healthier habits for longer than just the very start of the year.

More and more food related initiatives are becoming popular outside of just Veganuary itself, such as 'Flexibuary' and 'Meat Free Mondays'.





▲ Insight 2

## Eco-travel is on holidaymakers' minds

Our data shows an increased interest in sustainable transport in Q1, with a 15% increase in searches vs last year.

This search trend for eco-travel suggests that although the cost-of-living crisis and inflation are still a huge burden, people continue to be conscious of how they travel, and are still looking into sustainable travel options.

▲ Implication 2

## Travel brands should continue to call out ESG messages

Travel brands should be calling out their credentials as much as possible, to resonate with audiences on this ongoing topic.

We have spotted several campaigns where brands have not necessarily made the most of their ESG messaging, which is a missed opportunity as the interest is there (whilst bearing in mind greenwashing, of course).

▲ Insight 3

## Plant-based alternatives messaging issues

Despite the interest in more sustainable food increasing, our search insights tool shows that plant-based products are seeing a decrease in YoY searches, with the likes of Beyond Meat seeing -59% drop off.

This suggests that the industry may have a messaging problem when it comes to these types of meat replacement products and are potentially being positioned in ads in a less effective way.

Perhaps these brands are turning them into too much of a novelty rather than positioning them as a credible everyday alternative for their meals.

▲ Implication 3

## Plant-based products should utilise the power of social media

With audiences being exposed to lots of food-related content on Instagram and TikTok feeds, mixed with the power of advocacy to change people's consumption habits, plant-based products have an opportunity to continue making alternative meats a big craze – especially when seen as part of an inspirational vegan recipe and not just a standalone product.

The interest in eating more sustainably is there, it's just about converting those searches into purchases by making those products a 'must buy'.






## ▲ Thank You


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 Q1 2023

 Q4 2022

 Q3 2022

 Q2 2022

 Q1 2022



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