

Michael Buble, Kevin the Carrot, Dawn French, Graham Norton and even Rick Astley all appear but which of the supermarket chains wins the title of Scotland's Favourite Christmas TV Ad of 2023?



Over the weekend of 9th and 10th December 2023, 56 Degree Insight undertook an online survey of 1,002 Scottish residents, representative of the overall population in terms of age, gender, economic group and geography. What were their views on the TV advertisements from the 8 main supermarket chains this year - and which one was their favourite? We applied our typical campaign evaluation approach to the analysis - firstly looking at VISIBILITY metrics (spontaneous then prompted awareness and

recognition), then a series of ENGAGEMENT measures including likeability, salience, trust, tone, interest, relevance and warmth. Then we looked at the ACTIONS taken - how many were more persuaded to shop at each supermarket, and how did the ads impact the BRAND APPEAL? There are winners in each category - however we do have an OVERALL WINNER - the most popular advertisement amongst the largest proportion of Scots this year.....

Over three quarters of us watch broadcast TV daily or on most days of the week (77%) - clearly as an

The level of interest in watching Christmas TV adverts remains high

advertising channel, TV remains hugely influential (especially amongst the older audience as viewing frequency tends to increase with age).

And indeed, most of us watch TV ads - at least to some extent (80%) - though conversely, the under 45s are more likely to do so than older Scots. 17% take a break from watching TV during commercial breaks, and 3%

switch to another channel. Importantly, Christmas TV ads do tend to get more attention - 60% of us are more likely to watch Christmas ads than those at other times of the year whilst only 9% watch them less. So whilst this all points to an interest in watching TV ads in the run-up to Christmas, reactions to the stances taken by the Co-op and Iceland are interesting. Neither have invested in Christmas TV ads this

winter, instead investing in charity donations and supporting customers during the cost of living crisis. When. this was described, over half of Scots were supportive and wished that other supermarkets took a similar stance (55%). Only 9% didn't support this, instead believing that Christmas TV ads are part of that run-up to Christmas. Some clear food for thought however for the supermarket brands next year.



Spontaneous awareness of the brands advertising on television this festive season - the top 15 mentions

ADVERTISING VISIBILITY

When it comes to Christmas advertising on television, 'up front' M&S JOHN we asked Scots, without any prompting, which brands they recalled seeing any Christmas-themed advertising on TV.

The most common response was M&S - over a third of Scots mentioned this brand spontaneously (34%) - though clearly this was a mix of the wider M&S and the M&S Food offers.

Aldi and John Lewis were jointly second in terms of spontaneous awareness, just four points behind on 30% mentions. ASDA and

Tesco were the only other brands mentioned by one in five or more of the population (24% and 20% respectively). Lidl was the next most mentioned supermarket (16%) followed by

Morrisons (10%), Sainsbury's (9%), and, some way behind,

Irn Bru (4%), Amazon (4%) and Argos (4%).

suggesting strong cut through of each ad.

In terms of relevance, Aldi's

ad scored highest with one in

four strongly agreeing (25%).

Lidl was a fairly close second

and Tesco scoring around 18-

INTEREST in the advertising

(22%) with M&S Food, ASDA

think more warmly about

Lidl again nudges out Aldi in terms

of the extent to which it brings out

a warmth towards the brand (28%

'fuzzy/feel good' nature of the ad.

These two brands are significantly

For each brand of course, a key outcome of the

cases, the ads have contributed to increases in

claimed likelihood to shop with them, but this is

Christmas advertising is to try to convince people to

shop in their stores in the lead-up to Christmas. In all

balance, the Aldi ad has had a slightly greater impact with a larger proportion 'much more likely' to do so.

M&S Food and ASDA are not far behind (44% and 42%

higher than the other six on this

strongly agree - reflecting the

[BRAND]"

measure

these measures.

19%.

Waitrose (3%). Other brands mentioned included Coca Cola (8%),

Prompted awareness of the eight supermarket Christmas ads on television, 2023







LDI

orrisons

Morrisons

+6%

68%

62%

+45%

+52%



74%

58%

+50%

+49%

ALDI

Sainsbury's

+3%

61%

II≜ ALDI

Sainsbury's



70%

40%

70%

50%

+50%

WAITROSE & PARTNERS

+37%

WAITROSE & PARTNERS

+10%

29%

22%

47%

47%

44%

17%

37%

A bit

more likely more likely

15%

14%

28%

ASDA

16%

The raccoon's

warm feeling

hilarious. I like the

characters and the

Brings a tear to the eye

44% 3rd

39% 4th

old days, it's joytul

Shopping

impact

Brand

impact

I love this! Welcome to Urexham,

Hollywood stars with notable voices

dawn french who can make anything

funny, and a super storyline. Great

I love this advert

and the giving to

Engagement-

Likeability

Warmth

I like this advert and

the fact that it's voiced

by Dawn French

Tone

M&S

– FOOD –

13%

TESCO

33%

21%

19%

14%

11%

We then prompted with a list of the eight main supermarket brands and asked Scots which if M&S any they had seen with a Christmas TV ad this year. Generally, levels of claimed awareness were high across the board: <u>__</u>FOOD — 83% The most mentioned brand was M&S Food (83%), significantly ahead of Aldi (75%) and Asda (74%). A few points further behind were Tesco (70%) and Lidl (68%). +49%

Prompted recognition of the eight supermarket Christmas ads on television, 2023

When provided with a description of the TV advertising used by each brand, along with a

Sainsbury's delivered similar levels of recognition to their prompted awareness -

ASDA, Morrisons and Waitrose all showed more significant increases on prompted

that it was the only one that less than half of the population claimed to have seen (40%).

respectively), whilst the lower and more regional weight of the Waitrose Christmas ad meant

NB: Percentages below each brand on the right show the difference between Prompted Awareness and Spontaneous Awareness

Morrisons and Sainsbury ads had each been seen by around six in ten (62% and 58%)

awareness - perhaps suggesting that more had seen these ads than initially claimed, perhaps suggesting the branding itself was less memorable for some. In the case of M&S, prompted awareness was higher than recognition - suggesting some cross-over between

Impact on RELEVANCE of brand *II*≜ ALDI

LEVELS OF ADVERTISING ENGAGEMENT



storyboard of images from the ads, levels of recognition generally tended to confirm the prompted awareness described above - in most cases, especially Aldi, Tesco, Lidl and FOOD -83% 78% +9%

LDL

SALIENCE of advertising

in particular scores well on this

agreeing that they like the add -

Morrisons ads also do relatively

just ahead of Aldi at 27%. The

ASDA, M&S Food, Tesco and

well on this measure

measure with 29% strongly

LODL

68%

the broader M&S advertising vis-a-vis that for the M&S Food brand. NB: Percentages below each brand on the right show the difference between Recognition and Prompted Awareness

25% "The advertising makes [BRAND] feel more relevant 22% LODL to me" M&S **food**

ASDA

ainsbury's

WAITROSE & PARTNERS

TESCO

"The advertising catches my 19%

26%

19%

18%

16%

14%

12%



M&S **food**

'ESCO

ainsbury

WAITROSE & PARTNERS

//≜ALDI 26% "The content of the advertising LDL 24% is interesting to me"

ASDA 22% Aldi and Lidl again score **TESCO** 20% highest in terms of interest (26% and 24% respectively), 19% M&S **FOOD** followed by ASDA (22%) and Morrisons Tesco (20%). Compared with 17% most other metrics, M&S Food WAITROSE & PARTNERS 13% performs relatively less well on this measure 13% Impact on WARMTH towards the brand LDL 28% "The advertisement makes me

//≜ ALDI

TESCO 19% ASDA 19% 18% M&S **FOOD** Morrisons Sainsbury's WAITROSE & PARTNERS ACTIONS TAKEN HAVING SEEN THE ADS

LDL 31% "The advertisement sets the right 28% **//≜ALDI** tone and is appropriate just now" **ASDA** 24% Lidl's performance on this metric is the highest across all M&S **FOOD** 22% engagement measures with 31% in 20% strong agreement that the supermarket has got the tone just 20% right - again, just ahead of Aldi 18% Sainsbury (28%)WAITROSE 11% In summary, whilst M&S Food and ASDA did particularly well on the Visibility measures, when it comes to Engagement, both Aldi and Lidl have been the best performers. Aldi - in terms of Relevance, Salience and Interest; Lidl in terms of warmth, tone and likeability. Both Discounter brands have outperformed all of the others across all of

25%

22%

19%

15%

28%

13%

27%

Extent to which advertising sets the appropriate TONE

especially the case for the two major discounters -ASDA almost half of the population say they are more likely 42% 24% 18% to shop in either Aldi or Lidl over the festive period, having seen the adverts (47% in each case). On 17% 38% 21%

M&S FOOD

//≜ALDI

LODL

Morrisons

Sainsbury's

respectively) suggesting their ads have also been quite persuasive - and certainly ahead of the other WAITROSE key players in this category.

IMPACT OF THE ADS ON BRAND APPEAL:

Many advertising campaigns also have the longer term goal of improving the overall perceptions of the brand. We asked Scots respondents the extent to which each ad made them more or less positive towards the brand. In this case, Lidl is the clear winner, with 48% of Scots claiming the 'feel good' nature of the ad had a positive impact on brand appeal. Aldi was not far behind (45%), whilst around four in ten Scots' impressions of

the ASDA and M&S Food brands had also increased positively. Morrisons edged out Tesco for 5th place.

SO WHAT IS THE MOST POPULAR S As we have seen, the M&S Food and ASDA Christmas TV ads have tended to rate highest of the 8 supermarket brands in terms of Awareness and Recognition. However, when it came to the various Engagement measures, Aldi and Lidl tended to share top spot - depending on the particular metric.

brand appeal.

Food claiming 4th spot.

-Popularity--

Ranked No.1 24%

1st

-Popularity--

Ranked **16%**

3rd

24%

3rd

74%

3rd

83%

70%

Love Michael Buble,

-Visibility-

ALDI

ASDA

Spontaneous

Awareness

Prompted

Awareness

Ad Recognition

Ad Recognition

These high levels of engagement for Aldi and Lidl then translated into the

highest levels of likelihood to shop at these supermarkets over Christmas, whilst Lidl narrowly edged out Aldi when it came to the impact of the ads on

However, when asked to rank the 8 TV ads from 1st to 8th in terms of which was

their most to least favourite, the winner is Aldi - just under a quarter of Scots chose this ad (24%). Lidl edged out ASDA for 2nd place (17% vs 16%), with M&S

		29%					19% 489			
//≜ AL	DI		2	24%				21%	45%	6
ASD	A		2	3%			17%	40%	6	
M&S FO	OD			269	%	1	3%	39%		
Morris	ions		i	24%		17%	369	%		
TESC	O		20%			15%	35%			
Sainsbu	ry's		20%		10%	30%				
WAITRO & PARTNE		14%	:	10%	24%		mo	A bit re positive		uch oositi
ale V	de V		d.		d.	V	d.	.,	di	
•.**.***.**	*:**: **	·.•**.•	*••	* ·	•***	• 桊·.•	**.	• 桊·.•	·歉·	• *
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Scotland's favourite

Proportion of Scots adults

ranking each brand 1st

2023 Christmas TV Ad

The most important themes to emerge which seemed to increase appeal were 12% capturing the essence of Christmas, a bit of humour and fun, tugging on the heart strings and a compelling story. Celebrity involvement, though popular, can backfire if they are not liked by the viewer - characters such as Kevin (Aldi) 9% and the racoon (Lidl) are popular and appealing.

Aldi have nailed the Christmas adverts

with Kevin the carrot. It's now a symbol

of Christmas we recognize, even more so

this year with the Wonka movie release

Shopping

impact

Brand

impact

Brand

impact

Michael Bublé was quite a

42% 4th

40% 3rd

35% 6th

This is a funny

my interest as the

story unfolded

advert and really held

The advert is very

public - what did they think of each ad, in their own words?

along with some verbatim quotes from the Scottish

Visibility--Spontaneous **30%** 2nd **Engagement Awareness** Shopping 25% Relevance impact Prompted Brand impact Interest 26% Ad Recognition

brilliant take of the

Engagement-

This advert stars Michael Buble who takes on the tole of Asda's Chief Quality Officer

Likeability

Compared with most It is a really fun ad

original

of the others, its just which is funny and

After personally checking the quality and providing feedback on a selection of Asda's products he joins co

catching and great idea to

theme it in Willy Wonka

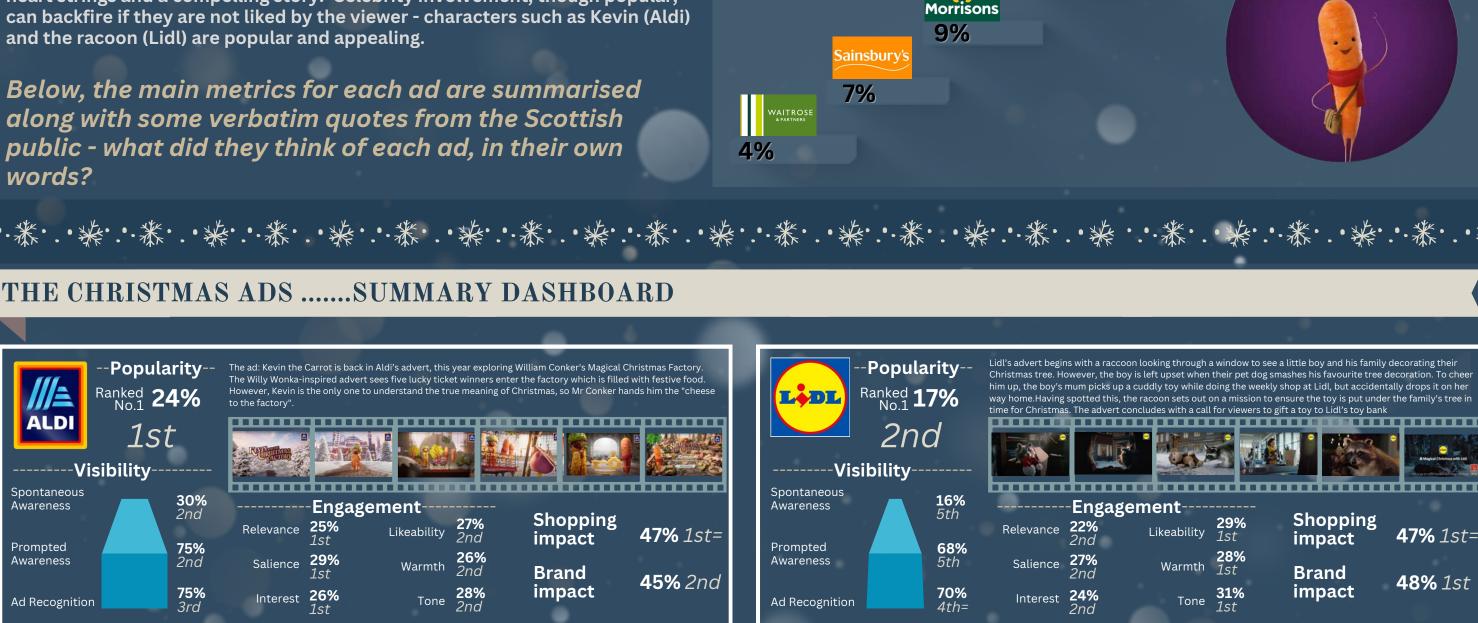
Relevance

Salience

Interest

22%

as chocolate factory film



Really nice advert, like

the tone, the style and

-Popularity--

4th

34%

1st

83%

Always like to see M&3

see what they have in party

food as it's different to other

Christmas adverts as I like to

1st

Relevance

Salience

Interest 19%

-Visibility

M&S

– FOOD –

Spontaneous

Prompted

Awareness

Ad Recognition

they said



Interest 20%

catchy and would grab a bit boring

