



Connecting with Canadians: *Unwrapping the Mind of the Holiday Shopper*

Lessons from neuroscience on holiday communication

Black Friday, which marks the (un)official start of the holiday shopping season, is just 119 days away. But for advertisers planning to connect with shoppers this holiday season, preparations are already well underway. Some are producing short films sharing an inspiring tale of reuniting families (airlines) or finding the perfect gift (retailers) or bringing family and friends together over Christmas meals (grocers). Some will almost certainly use animation in an effort to stand out. Many will select a famous song or perhaps a forgotten classic to back their campaign. Some will commission their own musical composition. Others will eschew the dramatic altogether and opt for campaigns filled with tongue-in-cheek humour. They'll create a handful of shorter-length videos and spray them across YouTube and Facebook. Some may try the 'ugly aesthetic'¹ PC Brand used last year, integrating user generated content (UGC) into their ads. Winners - and losers - will be decided by the choices taken: the themes explored, the tones used, the talent cast, the music selected, the style adopted, and the media invested in. Competition is fierce this time of year. Victory may mean winning by the slightest of margins.

But succeeding in the mind of the holiday shopper - even by the finest margins - would substantially shift both what they buy, and where they buy it. This is the opportunity. We've created this special report to help you seize this opportunity and improve your chances of success this holiday season. What you'll find is an extensive study into holiday ad effectiveness, revealing the themes, styles, music and media that connect best with Canadians. This is the largest neuroscience research study ever conducted into the effectiveness of holiday advertising. More than 1000 paid research participants had their brain wave activity recorded.

We've analyzed dozens of holiday ads from a variety of industries: Retail, Travel, Consumer Technology, Telecommunications, Confectionary and Food, Apparel, Payments and QSR. We've sourced these ads from six different countries - Canada, US, UK, France, UAE and Singapore - because we believe there's much to learn from what others are doing in different markets. The report also includes analysis on content from the traditional powerhouses of holiday advertising (John Lewis, Apple, etc.), both for inspiration and, as it turns out, to dispel notions that their considerable budgets are needed to deliver results.

As ardent supporters of the effectiveness of creative advertising and marketing, our aim with this report is to empower brands and their partners with unrivalled insights into what persuades, engages and connects with the holiday shopper, to position you best to win the hearts, minds and wallets of consumers this festive season.

Happy holiday hunting!

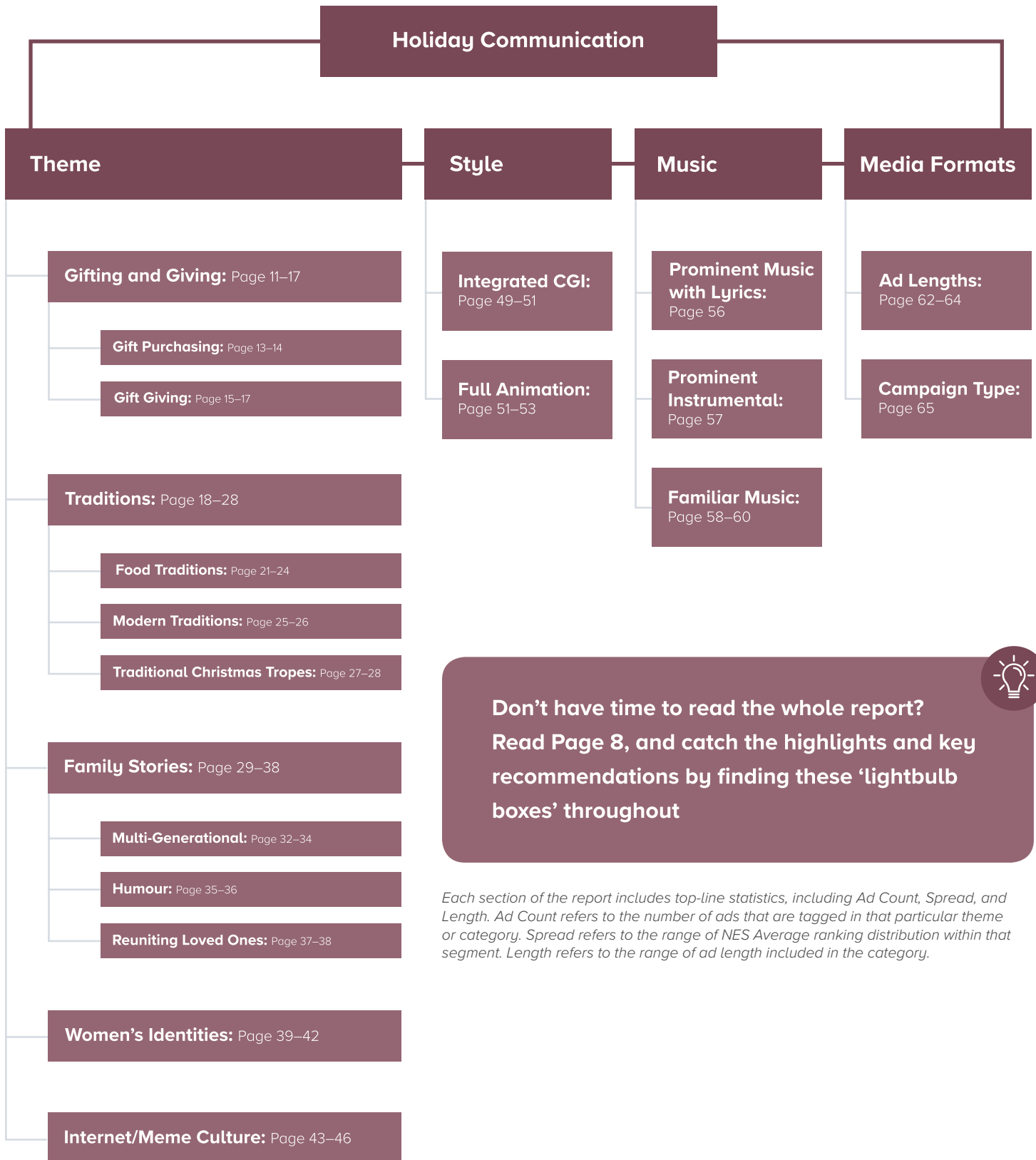
Sincerely,



Kevin Keane | CEO, Brainsights

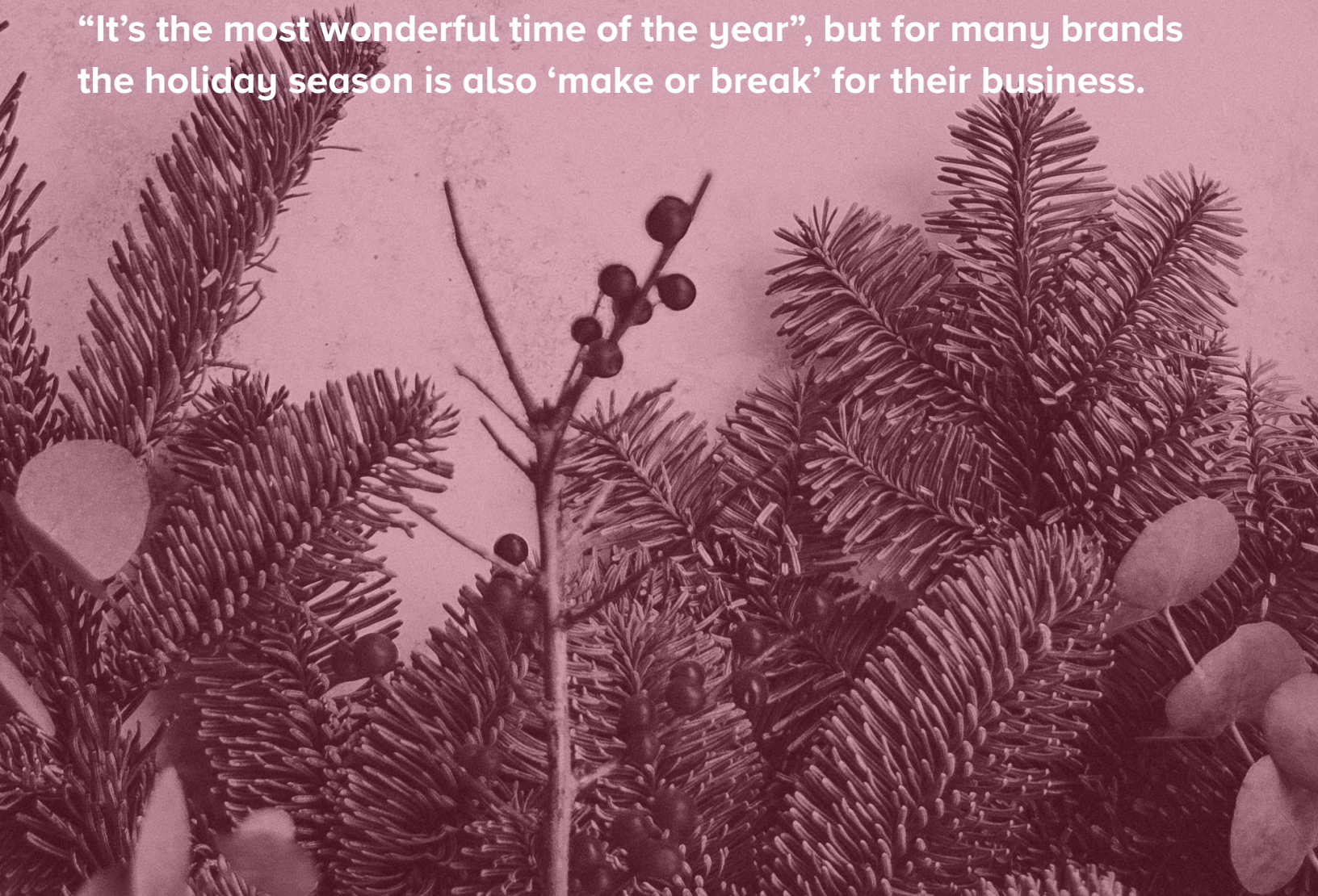
1. 'Online Advertising for Big Brands Gets 'Ugly'', Wall Street Journal, June 16th, 2019 (<https://www.wsj.com/articles/online-advertising-for-big-brands-gets-ugly-11560692258>)

How to Read and Use This Report



Introduction

“It’s the most wonderful time of the year”, but for many brands the holiday season is also ‘make or break’ for their business.



Consumer Spending during the Holidays

General merchandise retailers like Walmart and Canadian Tire can do 40% of their business in the final quarter of the calendar year; QSRs like Starbucks have built entire sub-brands (Red Cup) around the holiday season.

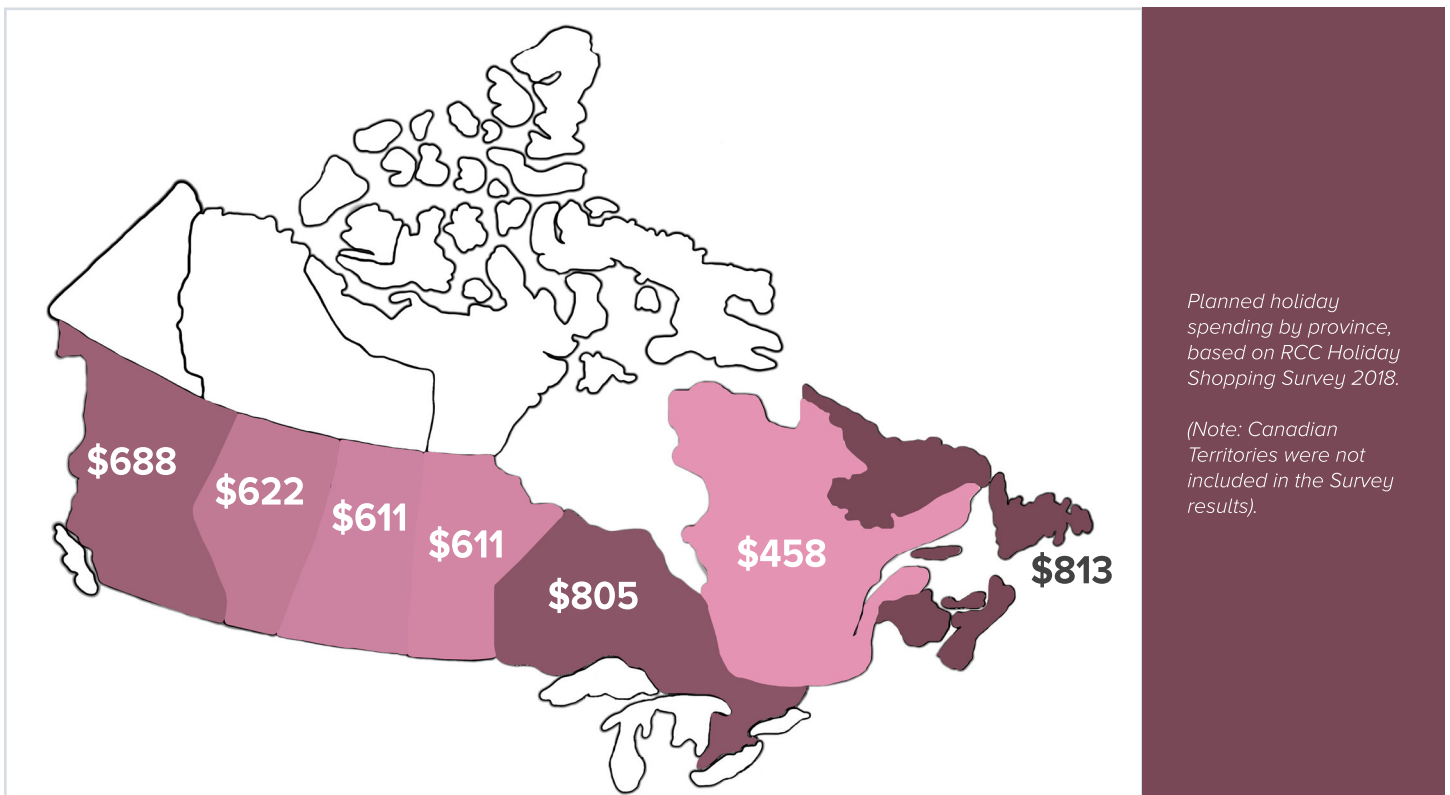
Winning the holidays is, for these brands, business critical.

And Canadians are spending.

According to the Retail Council of Canada Holiday Shopping Survey 2018², the average Canadian budgeted \$675 to spend last holiday season. This was 11% higher than the previous year.

Atlantic Canada (\$813) and Ontario (\$805) led the way in budgeted 2018 spending.

The largest portion of that (19%) was to be spent on holiday entertaining (food/alcohol/sweets), followed by clothing (17%), toys (10%), dining out (8%), and personal electronics, vacations, books and music (each at 6%).



2. 'RCC Holiday Shopping Survey 2018' (<https://www.retailcouncil.org/research/holiday-shopping-in-canada-survey-2018/>)



The Opportunity

\$11B in undecided/unplanned spend when holiday season arrives.



The Challenge

Breaking through and persuading in a cluttered and intensely competitive marketplace.



The Solution

Craft the route to the decision-making brain with neuroscience insights.

Advertisers are responding. According to a 2018 Nanigans survey³ (US Data), retailers alone planned to spend more than one-quarter of their annual digital advertising budgets on the Black Friday/Cyber Monday weekend. In part, this is because consumers are open to being persuaded: according to Deloitte⁴ (US Data), 50% of holiday purchases are either completely unplanned or yet to be finalized by the time the holiday season is underway.

The opportunity is huge, but so are the stakes.

Assuming the average Canadian's budgeted spend grows at the same pace as it did last year, and assuming Canadians are as easily persuaded as our American neighbours, the opportunity for Canadian businesses would be in excess of \$11B.

So how can Canadian advertisers claim their share and win the holidays? Tap into the unconscious, decision-making brains of holiday shoppers.

About this Report

Brainsights analyzed a sample of eighty-eight 2018 holiday video ads from its database of brain data. *Connecting with Canadians: Unwrapping the Mind of the Holiday Shopper* is designed to provide brands and their partners with neuroscientific insights about how the Canadian consumer responds to holiday advertising to produce the most effective holiday campaign.

Through this Report, we examine the themes, styles, ad lengths, campaign types, and music choices that will give brands a greater probability of success this holiday season. Ads are often tagged across multiple themes and categories, and are therefore referenced several times in the Report.

The objective of the Report is two-fold:

1. To understand what activates the unconscious, decision-making brain of holiday shoppers.
2. To help advertisers create the most compelling and breakthrough holiday advertising campaigns in 2019, through audience brain insights.

3. 'Retailers to spend more on Black Friday digital ads than Cyber Monday in 2018 Holiday Shopping Season...' (<https://www.businesswire.com/news/home/20181016005150/en/Retailers-Spend-Black-Friday-Digital-Ads-Cyber>)

4. '2018 Deloitte Holiday Retail Survey' (<https://www2.deloitte.com/insights/us/en/industry/retail-distribution/holiday-retail-sales-consumer-survey.html?nc=1>)

Methodology



Each ad in this study was shown to Canadians while they had their brain waves recorded using electroencephalography, registering their moment-by-moment neural engagement.



Neural engagement is comprised of the unconscious response of consumers for three essential metrics: Attention, emotional Connection and memory Encoding.



Each ad was scored and ranked by the Neural Engagement it elicited from general population audiences versus benchmarks for these audiences.



Each ad was tagged and analyzed by a number of different content descriptors, including ad length, style, theme, music and industry.
(For a full methodology, see Appendix 1).

Key Terms and Definitions

Neural Engagement Score (NES Average)

A composite measure of unconscious Attention, Connection, and Encoding. NES Average reflects the overall persuasiveness of the ad. For the purposes of this report, the Score is framed as a ranking (out of 88 ads tested).

Max Attention

The highest individual moments of Attention during an ad, which is framed as a ranking out of 88.

Max Connection

The highest individual moments that elicit the deepest levels of emotional Connection during an ad, which is framed as a ranking out of 88.






Max Encoding

The highest individual moments of memory Encoding during an ad, which is framed as a ranking out of 88.

Overview of Report Findings

The best-performing holiday ads do these things






Either

-  • 15 seconds or less
-  • Product-focused
• Offer convenience and decision making suggestions
-  • Gifting and Giving
• Internet/Meme Culture
-  • Humorous
-  • Background instrumental, with dialogue or voiceover

Or

- 60 to 96 seconds
- Metaphorical Santa figure
- Extended family and friends spending time together in familiar settings
- Diverse, multi-generational cast
- Gifting and Giving
- Food and Modern Traditions
- Family Stories
- Narrative story-telling
- Familiar song (cover or original) that aligns with ad narrative

The worst-performing holiday ads do these things

-  • 100+ seconds in length
-  • Lack diversity in casting
• Predominant focus on parent-child relationship
• Lack human connection between loved ones
-  • Traditional Christmas tropes
-  • Animated
-  • Prominent instrumental, without dialogue or voiceover
• Melancholy music and/or music that doesn't align with narrative



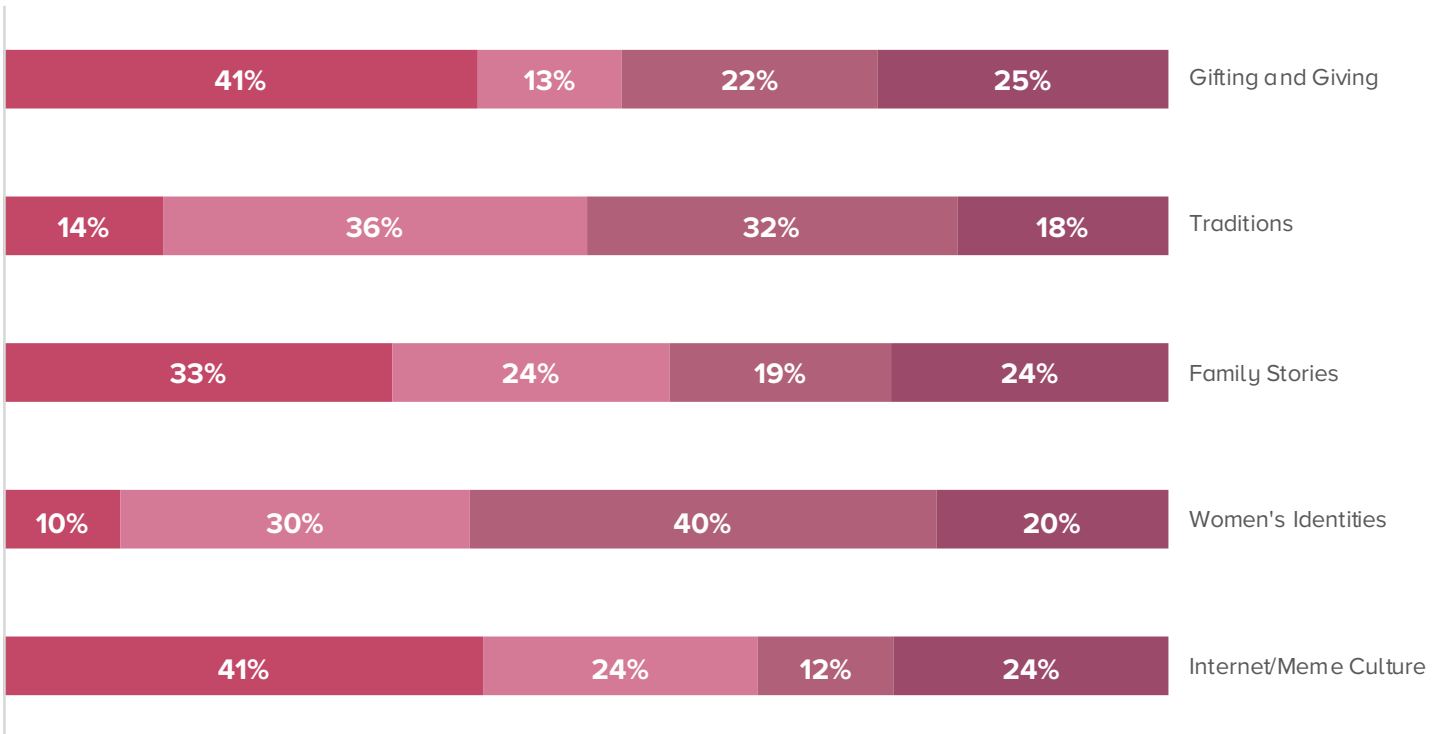
Themes

Holiday ads utilized several common themes in their storytelling: **Gifting and Giving, Traditions, Family Stories, Women's Identities,** and **Internet/Meme Culture**. These themes are further segmented to differentiate the focus of the ad (i.e. Traditions includes 'Food Traditions', 'Modern Traditions', and 'Traditional Christmas Tropes').

Ad Performance Spread By Theme

Distribution by Ad Performance (Ranking of Average Neural Engagement Score)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



This chart shows the relative benefit and risk of each theme by breaking down the distribution of ad performance by ranking based on average Neural Engagement Score. For example, 41% of ads tagged with the Gifts and Giving theme performed in the top quartile of all ads, whereas 25% of these performed in the bottom quartile.

Themes are how we categorize the angle or approach the content is taking in order to connect with the audience. We break down each of these themes and sub-themes to show which are most successful with Canadians and which fail to persuade.

A person is holding a wrapped gift. The gift is wrapped in white paper with a repeating pattern of candy canes. A striped ribbon is tied around the gift. The person's hands are visible, holding the gift from the sides. The background is blurred, showing what appears to be a person in a white shirt.

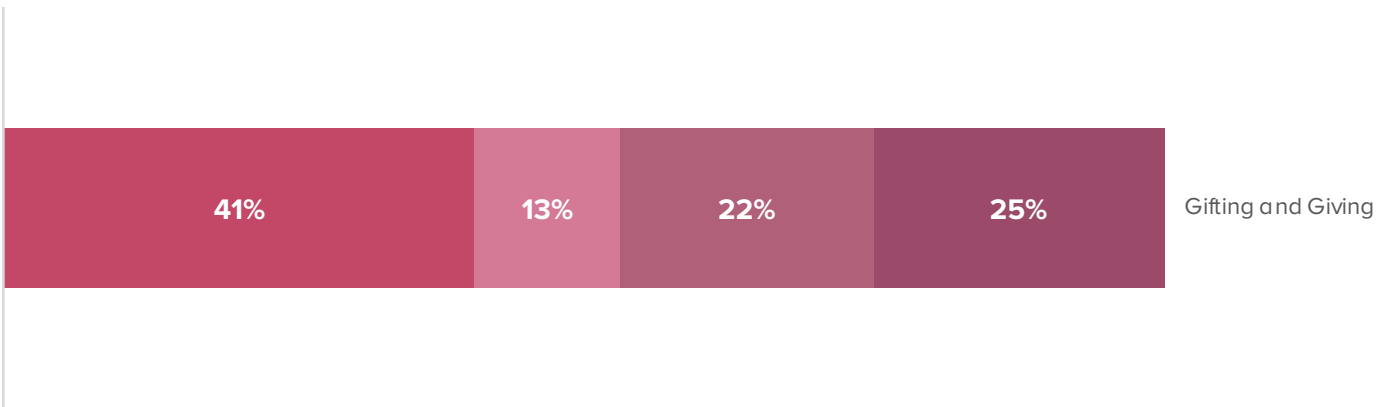
Gifts and Giving

'Gifts and Giving' is an important theme for retailers, and largely falls into two sub-themes: **gift purchasing** and **gift giving**. We explore each in turn.

Ad Performance Spread

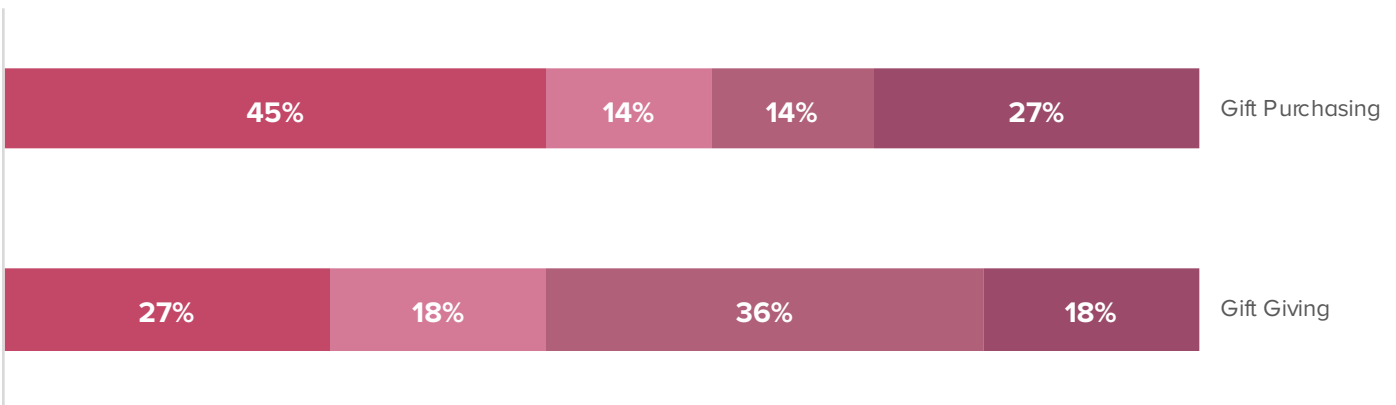
Distribution of Ad Performance for Gifting and Giving (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



Distribution of Ad Performance by sub-theme (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



Gift Purchasing



22

Ad Count



#2 to #88

Spread



6–96 seconds

Length

Gift purchasing is a popular sub-theme used by retailers to deliver a product-focused and/or service-focused holiday ad—the theme appeared in 25% of all ads analyzed. Ads tagged as ‘gift purchasing’ include in-store shopping experiences and product-focused out-of-store experiences, with the intention of choosing a gift for someone. Both the in-store product-focus and out-of-store product-focus settings perform well, but there are important performance differentiators that are explored below.

What works best

- **15 seconds or less**
- **Focus on single product purchase OR offer short-list of gifting suggestions**
- **Enjoyable shopping experiences**

Focus on single product, or short-list of gifting suggestions

Product-focused, gift purchasing ads that are 15 seconds or less performed best in this category, but the content focus that separates the top performing ads from those at the bottom is quite nuanced. First, the best performing ads focus on one type of gift product (i.e. headphones, perfume) and/or provide decision-making suggestions for last-minute buyers, using a short-list (3) of gift options (i.e. helping consumers select a personalized Secret Santa gift). Secondly, these ads communicate the need for thoughtful gift-giving: despite the struggle to find the perfect gift for people on your ‘list’, the TJX, TJ Maxx and Shoppers Drug Mart ads imply that the purchase is still a thoughtful one and perform well, as a result. Communicate thoughtful gift-buying (rather than gift-buying as a chore, or mindless consumerism) to imbue a sense of meaning into the shopping experience.

Walmart took a humorous approach to this in “Toy Academy”, which ranked #11 overall for Average NES. The 15-second ad features a ‘deer-in-headlights’ uncle searching for gifts, who is ‘saved’ by a Walmart Toy Expert (a young girl named Olivia). Olivia reassures the uncle that the three gifts he’s walking away with are great choices: “Trust me, she’ll love them”. Responding to shoppers who are overwhelmed by the selection of toys, Walmart offers a service that provides gifting advice. The ad reverses the typical adult-child power dynamic, with a young Toy Expert advising the clueless uncle.

Enjoyable shopping experience

The idea of an enjoyable in-store shopping experience performed well. Nordstrom’s “Let’s Go Gifting” ranked #19 overall for Average NES, featuring a group of young friends running through the store to the upbeat “Go! Go! Go!” by Dean Martin. While no specific product is featured, the ad highlights the fun and enjoyable experience of shopping with friends and the beauty of the Nordstrom gift box. In TJX’s *Offline Shopping* campaign, the ads that perform best focus on the smiling faces of those enjoying their shopping experience, again unconsciously signalling to shoppers the joy that can be found in the shopping experience.

What underperforms

- **30-second product ads**
- **Stressful, thoughtless shopping experiences**



Screenshot: Joe Fresh, “Jessi Cruickshank Shops Holiday At Joe Fresh”

Stressful shopping experience

Joe Fresh’s 74-second ad, featuring Jessi Cruickshank furiously shopping for her whole family, ranked second-to-last (#87) overall for Average NES. The ad also performed poorly on Max Attention (#78), emotional Connection (#71), and Encoding to memory (#52)—markers that have the potential to rank much higher in longer ads. The ad highlights some of the worst qualities and experiences of the

holidays: stressful shopping, buying for the sake of buying, and the lack of thoughtful or personalized gifting. It is these qualities, rather than the convenience of shopping at Joe Fresh, which dominate the content.


Ads included in this sub-theme

- Argos, “The Christmas Fool”
- Interac, “Pillow” (15)
- Interac, “Pillow” (30)
- Joe Fresh, “Jessi Cruickshank Shops Holiday At Joe Fresh”
- Nordstrom, “Let’s Go Gifting”
- Shoppers Drug Mart, “Mom’s Holiday Wishlist”
- TJ Maxx (5 spots)
- TJX “Holiday People List”
- TJX Offline Shopping (8 spots)
- Walmart Canada, “Bring Holiday Magic Home”
- Walmart Canada, “Toy Academy”

Gift Giving

 **11**
Ad Count

 **#10 to #69**
Spread

 **50–193 seconds**
Length

Holiday advertisements that focus on gift-giving tend to be longer in length (over 50 seconds) and rely on storytelling, often with an emotional and heartwarming tone. This style of ad is higher risk, with 6 of 11 ads in this segment performing in the bottom half overall for NES Average. However, when well-executed, longer ads focused around gift-giving have the potential to perform well, and deliver high levels of emotional Connection and Memorability (6 of 11 ranked in the top 15 for Max Connection and Max Encoding).

What works best

- **Metaphorical Santa figure**
- **Social values of kindness and empathy**
- **Familiar music that helps carry the narrative**

The Metaphorical Santa Figure

The best performing ads in this sub-theme employ a metaphorical Santa—a gift-giving figure that has a quality of magic or mystery—including TK Maxx (Stocking), Cadbury (multiple Secret Santas), IKEA (Grandfather), and Cineworld (Mary Poppins).



Screenshot: TK Maxx, “The Never-ending Stocking”

TK Maxx’s “The Never-ending Stocking” performed best in this sub-theme, ranking 10th overall for NES Average, 4th overall for Max Connection, and 5th overall for Max Encoding. An upbeat, fantastical 95-second ad, it focuses on a family who wins a year of gifts delivered by the Never-ending Stocking. Set to the song “Cuban Pete”, which was popularized in the 1994 film *The Mask* (starring Jim Carrey), the ad borrows style and aesthetic elements from the 2000 film *How the Grinch Stole Christmas* (also starring Jim Carrey) without specifically referencing the Grinch. Belching out Christmas gifts through every season, the Never-ending Stocking becomes part of the family, even sharing in family beach vacations. It is the retailer (TK Maxx), rather than the consumer, that is providing the gifts in this ad. The CGI Stocking is a stand-in for Santa, while serving the dual purpose of highlighting the generosity of the retailer and diversity of their offerings.

Cadbury’s “Secret Santa” ad (#16 NES Average), set to a cover of The Beatles’ “Do You Want To Know A Secret” by Mathilda Homer, features a series of vignettes of different “Secret Santas” gifting Cadbury products while they wear a mask of the Cadbury Santa. It shows both children and adults as gift-givers, but emphasis is placed on children as Santa. While Cadbury products are featured, the focus of the ad is on the joy derived from the act of gift-giving. In this way, it underscores important social values during the holiday season: kindness and compassion. Interestingly, while ads featuring a literal Santa as the main character (WestJet) do not perform well, the Cadbury Secret Santa ad performed well across NES Average, Max Connection (#12) and Max Encoding (#2).

As opposed to ‘Jolly Old Saint Nick’, employing a metaphorical Santa appeals to both those who grew up celebrating Christmas and those who know it from the outside as a Christian, gift-giving holiday.

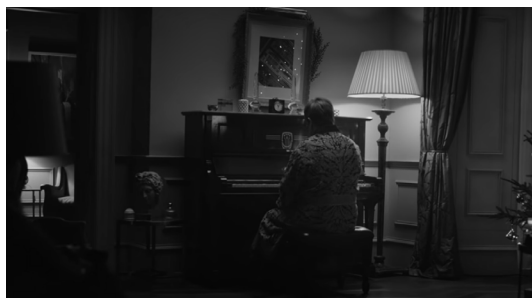
What underperforms

- **Prominent focus on parent-child relationship**
- **Familiar music that does not align with the narrative**

The ads that performed poorest in this theme segment include John Lewis’ “#EltonJohnLewis” (#61 for NES Average), Bouygues (#68), and Boots’ “Gifts That Get Them” (#69).

Prominent focus on parent-child relationship

See Family Stories (pages 33-34) for further analysis and case studies.



Screenshot: John Lewis & Partners, “#EltonJohnLewis”

Familiar music that doesn’t align with the narrative

Despite the traditional popularity of John Lewis’ Holiday ads, their 2018 ad, set to “Your Song” by Elton John, ranked #61 overall for NES Average. It begins with Elton John sitting at the piano in his living room and ends with his childhood-self receiving his first piano as a Christmas gift. The ad is told in reverse chronological order, highlighting piano performances through Elton John’s life. The most powerful

moments for emotional Connection are the depictions of Elton John as a boy and a child: playing piano at a family party as a teenager, playing piano at a recital as an early adolescent, and receiving his first piano at Christmas as a young boy. Although the aim of the ad was to tie in with the opening of the *Rocketman* film, the footage of Elton John performing as an adult artist did not connect well

with viewers. While it is a beautiful and popular song, “Your Song” does not help support the narrative or messaging of the ad, which in a roundabout way emphasizes the ability of certain gifts to transform the life of a child (“Some gifts are more than just gifts”).

Ads included in this sub-theme

- Boots, “Gifts that Get Them”
- Bouygues
- Cadbury, “Secret Santa”
- Cineworld, “Practically Perfect Gift”
- Emirates Airline, “Spreads Diwali Joy”
- IKEA, “Magic Man”
- John Lewis, “#EltonJohnLewis”
- PureWOW x Olay present “The Holiday Musical: Have you heard about...?”
- TK Maxx, “The Never-ending Stocking”
- Walmart Canada, “Bring Holiday Magic Home”
- WestJet, “Uniting Through Traditions, Haiti Day 3”



Screenshot: Walmart Canada, “Bring Holiday Magic Home”



Screenshot: WestJet, “Uniting Through Traditions, Haiti Day 3”

Get the most out of Gifting and Giving

Don’t underestimate the power of a smile—it has the power to unconsciously communicate the joy of gift-giving and gift-buying, which consumers seek during the holiday season. Ensure musical choices align with the story being told. Diversify the family representation and representations of Santa.





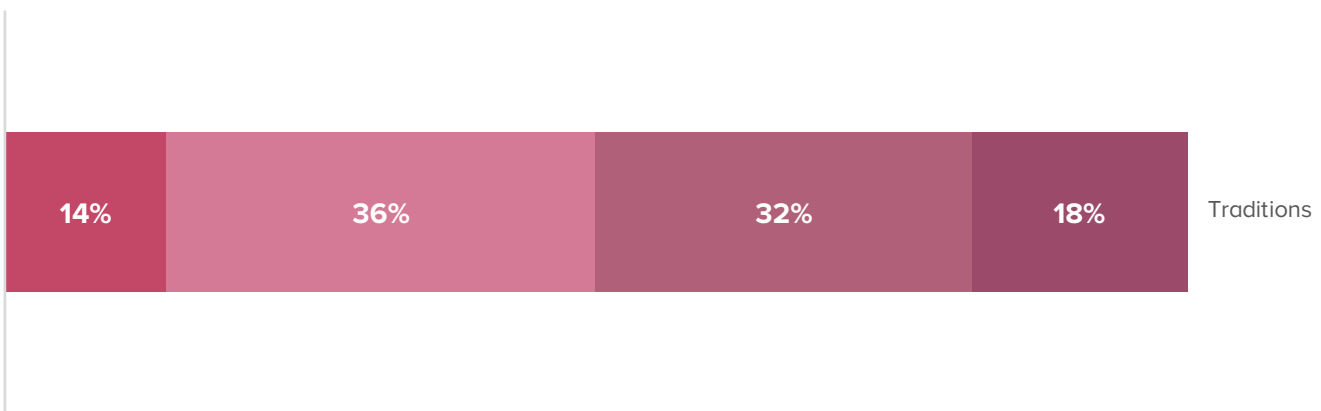
Traditions

Holiday traditions were a popular theme across the ads analyzed, particularly for grocers and QSR. 'Traditions' as a theme was further segmented into sub-themes of **Food Traditions**, **Modern Traditions**, and **Traditional Christmas Tropes**.

Ad Performance Spread

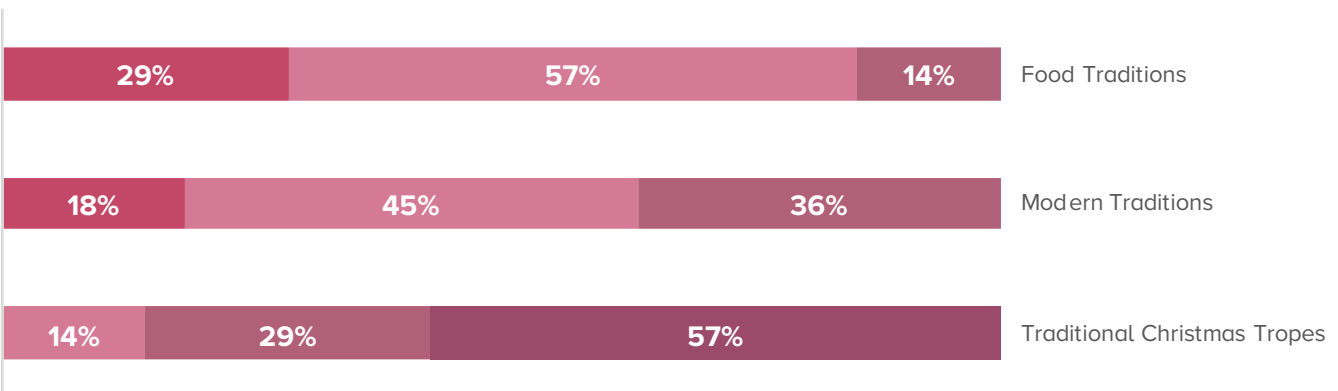
Distribution of Ad Performance for Traditions (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



Distribution of Ad Performance by sub-theme (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



**It's important to note that 'Food Traditions' and 'Modern Traditions' do not have any creative in the 4th quartile while 'Traditional Christmas Tropes' has no creative in the 1st quartile.*

Traditions

Traditional Christmas Tropes, including the Grinch, literal portrayals of Santa, and Dickensian or Victorian-inspired Christmas settings do not perform well. However, Food Traditions and Modern Traditions are more reliable features of successful holiday advertising. Although none of the ads that explore Food Traditions and Modern Traditions reached the top 10 for NES Average, the relative distribution was tighter than other thematic segments (like Gift Purchasing), making these less risky themes to pursue in holiday advertising.

What works best

- **Sharing food and cultural traditions**
- **Connecting diverse individuals and groups**
- **Social values of community, diversity, and multiculturalism**

The best performing ads in 'Food Traditions' and 'Modern Traditions' are underpinned by social values of community, diversity and multiculturalism. They also have a diverse cast of talent and depict groups of people celebrating together through shared cultural traditions.

What underperforms

- **Traditional Christmas Tropes**
- **Business history**
- **No reference to product/misalignment with product**

Traditional Christmas Tropes, including the Grinch, literal portrayals of Santa, and Dickensian-inspired settings do not perform well. These classic depictions of Christmas do not meaningfully reflect or represent the increasingly secular and multi-denominational/multicultural Canada.




Screenshot: Tesco, "However You Do Christmas"




Screenshot: Currys PC World

Traditions: Food

 **7**
Ad Count

 **#13 to #47**
Spread

 **30–90 seconds**
Length

The holiday ads analyzed in this report depict a variety of cultural food traditions, including those associated with Christmas (Turkey, Mince Pies, Brussels Sprouts, Christmas Pudding), Diwali (selection of Diwali sweets), and Lunar New Year (Yu Sheng, Pineapple Tart).

What works best

- **Social values of community, diversity, and multiculturalism**
- **“Food porn”**
- **Groups of people sharing food traditions**
- **Diversity in casting/talent**
- **Variety of vignettes, connected by common food theme**

Community, diversity, and multiculturalism

Social values of community, diversity, and multiculturalism were popular choices among grocers as a way to highlight food traditions. The holiday ads from Tesco, Marks & Spencer (M&S), and Waitrose & Partners are all underscored by a sense of community, depicting people coming together to celebrate the holidays through their shared enjoyment of food traditions. This was achieved best by the UK grocers Tesco and M&S, both of which used a variety of vignettes featuring diverse groups of friends and family talking about and enjoying Christmas foods.



Screenshot: Tesco, “However You Do Christmas”

Tesco’s 60-second ad, “However You Do Christmas” performed the best across the themes of Food Traditions and Modern Traditions. It ranked #13 overall for Average NES, while also ranking high on Max Connection (#5) and Max Encoding (#3). The ad is set to an instrumental version of Fleetwood Mac’s “Go Your Own Way”, which plays in the background as dialogue among friends and family drives the narrative. Traditional Christmas foods (i.e. Brussels

Sprouts, Turkey, Pudding) are used to tie together multiple vignettes of friends and families gathering in their homes during the holidays. The ad draws out the humour of family dynamics through various

scenarios of holiday food preparation and dining. The spot celebrates the wide variety of ways in which people experience the holidays—creating multiple points of relatability—while still using traditional Christmas food to connect the various stories.

“Discover Your M&S Christmas Favourite” (ranked #24 for NES Average) takes a similar approach to Tesco, in that it presents diverse groups of family and friends talking about their favourite Christmas foods, but there are also significant differences. The M&S ad is set up as a candid interview about holiday foods, in front of a wintry backdrop with people from across the UK. The style of the M&S ad (candid, conversational, interview) differs significantly from the scripted Tesco ad, though both use instrumental versions of familiar songs as background music (M&S chose Ed Sheeran’s “Shape of You”).

“Food porn”

“Food Porn” in holiday ads performs well when the wider context of the ad is focused on food. In the M&S ad, “Discover Your M&S Christmas Favourite”, food close-ups are interspersed into the dialogue about favourite holiday food traditions. A close-up of Brussels Sprouts (with the descriptive dialogue, “crunchy, fresh”) generated a spike in Connection, as did a close-up on mince pies and Christmas pudding (though not while a fork is cutting through the desserts). However, close-up shots of the traditional roast turkey did not see the same spike in Connection.

Two ads analyzed from the Waitrose & Partners campaign—“Mistletoe” and “Concert”—both depict holiday gatherings centred around a highly anticipated Christmas food. Both ads have a light and humorous tone, and the highest points of Connection in both examples occurred with “food porn” shots: close-ups of Christmas foods including a cranberry turkey parcel and mince pies.

A similar trend was seen in the Emirates Airline ad “Let’s Celebrate the Festival of Lights Together”, where close-up shots of several plates of sweet Diwali treats sparked a peak in Connection. A spike in Connection was also seen with a close-up of Yu Sheng (a raw fish salad) in the Government of Singapore’s ad for Lunar New Year.



Screenshot: M&S, “Discover Your M&S Christmas Favourite”



Screenshot: Emirates, “Let’s Celebrate the Festival of Lights Together”

What underperforms

- **Diversion from product**
- **Lack of focus on people**

Diversion from product

Fortnum & Mason's 48-second ad "Masters of Merry since 1707" performed the worst among ads tagged with this theme, ranking #47 overall (NES). The first half of the ad focuses on the historical longevity of Fortnum & Mason, highlighting major milestones over 300 years, which is followed by featuring various Christmas traditions, including Christmas pudding. The highest peaks in emotional Connection take place during the historical milestones (specifically, when Freddie Mercury and the moon landing are featured). While these moments help convey the longevity of the brand, these cultural references have no relation to the brand or the product feature. Fortnum & Mason's focus on business history in the holiday ad confuses the purpose, which was ultimately to feature Christmas food products, like pudding.



Screenshot: Fortnum & Mason, "Masters of Merry since 1707"

While "Discover Your M&S Christmas Favourite" performed above average overall, the opening and closing (the first 6 seconds and last 6 seconds) of an airstream trailer driving across the country, failed to connect with viewers. Rather than setting the stage for the context of the ad, it detracts from the overall message. See emotional Connection Trace Chart on the following page for the second-by-second visualization.

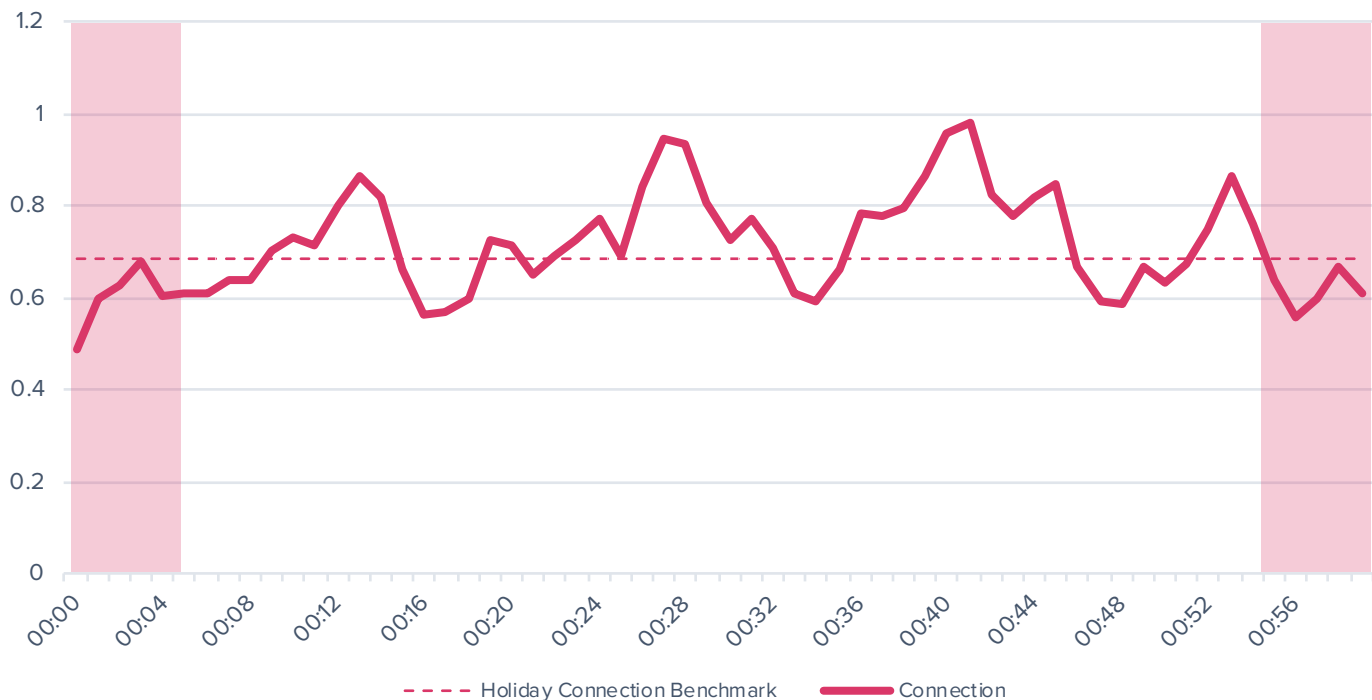


Screenshot: M&S, "Discover Your M&S Christmas Favourite"

Holiday shoppers finds these moments irrelevant.

"See pink vertical bars highlighting low Connection levels"

M&S, "Discover Your M&S Christmas Favourite" - Second-by-Second trace for Emotional Connection



Get the most out of Food Traditions

Focus on people talking about and enjoying food together, ideally across diverse cultural traditions. Intersperse "food porn" to highlight the product. Keep the focus on food.



Screenshot: Waitrose & Partners, "Concert"

Ads included in this sub-theme

- Emirates Airlines, "Let's Celebrate the Festival of Lights"
- Fortnum & Mason, "Masters of Merry since 1707"
- GovSingapore, "Kung Fu Fighter, Hidden Sugar"
- M&S, "Discover Your M&S Christmas Favourite"
- Tesco, "However You Do Christmas"
- Waitrose & Partners, "Concert"
- Waitrose & Partners, "Mistletoe"

Traditions: Modern



11
Ad Count



#13 to #66
Spread



30–120 seconds
Length

A variety of modern traditions were depicted in the holiday ads, including Secret Santa giving, Christmas concerts, and parties and gatherings with friends.

What works best

- **Celebrating Canadian multiculturalism**
- **Diverse casting/talent**
- **Sharing holiday traditions with family and friends**

Celebrating Canadian multiculturalism

Nordstrom’s 30-second ad “True Nord” ranked #26 for NES. It is an impressionistic ad that celebrates Canadian multiculturalism and inclusivity, with a voiceover inspired by the Canadian national anthem, ending with everyone coming together to celebrate.

Sharing holiday traditions

The importance of on-screen human connection can be seen through subtle differences within the Starbucks holiday campaign. Starbucks’ “Caramel Brûlée Latte” and “Peppermint Mocha” ads are very similar in style and format. However, the former ranked #41 in NES, while the latter ranked #52. Both ads show peaks in emotional Connection during the service exchange early in the ad, as the barista passes the customer their Starbucks cups, as well as at the end of the ad with the brand/product plate. In both ads, the central character is carrying two Starbucks cups—the implication being that they are going to meet a friend with whom to share it. However, the woman in the Peppermint



Screenshot: Starbucks, “Caramel Brûlée Latte”

Mocha ad never meets anyone, whereas in the Caramel Brûlée Latte ad there is a spike in both Connection and Attention when the main character meets his friend at the train station to share the Starbucks drink. As with ads in other theme segments, showing human connection on screen among family and friends (rather than simply hinting at it) improves the overall performance of an ad.

What underperforms

- **Diversion from product**
- **Depicting the exhaustion of the holiday season (post-party)**

Depicting the exhaustion of the holiday season

The M&S “Must-Haves” ad performed the worst in this sub-theme, ranking #66 for NES Average. It depicts the hustle of bouncing from holiday party to holiday party (and the exhaustion that follows), impressing in-laws, and watching movies with friends. Emphasizing the frenetic pace of the holiday season, across multiple disconnected vignettes, failed to connect meaningfully with viewers—perhaps because it is a reminder (that few of us need) of the stresses of the holiday season.

Ads included in this sub-theme

- Cadbury, “Secret Santa”
- M&S, “Must-Haves”
- Nordstrom, “True Nord”
- Sainsbury’s, “The Big Night”
- Starbucks, “Caramel Brûlée Latte”
- Starbucks, “Peppermint Mocha”
- Starbucks, “Red Cup”
- Tesco, “However You Do Christmas”
- Waitrose, “Concert”
- Waitrose, “Mistletoe”



Screenshot: Cadbury, “Secret Santa”



Screenshot: Nordstrom, “True Nord”

Traditions: Christmas Tropes



7

Ad Count



#40 to #83

Spread



30–127 seconds

Length

What works best

No ad tagged with this sub-theme performed meaningfully above average.

What underperforms

- **Literal representations of Santa and the Grinch**
- **Dickensian or Victorian-inspired settings and characters**
- **CGI integrations**

Traditional Christmas tropes, including Santa, the Grinch, and Dickensian or Victorian-inspired Christmas references fall flat—ranking in the lower half of the ads analyzed.

Dickensian or Victorian-inspired setting and characters

Canadian Tire’s campaign takes place in a Dickensian-inspired town—perhaps a nod to their classic 1980s and 1990s ‘Save Like Scrooge’ ads—and all three ads performed poorly. “Magic” ranked #59 for NES Average, “Big Help” ranked #79, and “Ghosts of Christmas Presents” ranked #83. In “Magic”, depictions of the giant and the Victorian ghosts saw significant drops in Connection. The highest points of Connection were associated with food (taking baking out of the oven; sitting down to dinner with friends), and a look into the children’s bedroom on Christmas morning.



Screenshot: Currys PC World

The Currys PC World holiday ad was the best performing ad in this sub-theme, but still only performed slightly above average, ranking #40 overall. Its setting is inspired by Victorian London (in 19th-century homes, pubs, and streetscapes) and re-imagined with 21st century technologies (i.e. a drone flying through the streets; large flat screen TV in a pub). Unfortunately, this creative re-imagination wasn’t enough to sidestep the drag of classic Christmas tropes and results in an average-performing spot.

Santa and the Grinch

Literal representations of Santa and the Grinch failed to perform well in holiday advertisements.

WestJet’s “Christmas Miracle: Uniting Through Traditions” campaign uses Santa in all three ads, two of which did not perform well (ranking #58 and #74 for NES Average). The WestJet “Uniting Through Traditions” ad that focuses on reuniting loved ones performed far better (ranking #29 overall for NES Average). In the latter ad, Santa appears only at the beginning and end, with the main focus on the family and friend reunions. Where Santa is the central figure driving the narrative, the ads did not perform well.

23andMe’s “The Grinch’s DNA Story” was designed as a cross-promotion with the 2018 computer-animated film, *The Grinch*. The ad ranked #71 of 88 for NES Average. This poor performance can be compared to another 23andMe holiday ad, “The Gift for Everyone You Love”, that focused on genetic family connections and ranked significantly higher at #43 for NES Average (though still just at benchmark Neural Engagement). The reliance on a computer-animated Grinch—using the classic Grinch characteristics to project genetic predispositions based on a fabricated DNA composition—was not a good choice for a biotechnology company that prioritizes scientific accuracy and data safety.

Ads included in this sub-theme

- 23andMe, “Discover the Grinch’s DNA Story”
- Canadian Tire, “Big Help”
- Canadian Tire, “Ghosts of Christmas Presents”
- Canadian Tire, “Magic”
- Currys PC World, “The Magic of Christmas long version”
- WestJet Christmas Miracle, “Uniting Through Traditions, Haiti Day 3”
- WestJet Christmas Miracle, “Uniting Through Traditions, Sneak Peek Day 1”

Get the most out of Traditions



Avoid traditional Christmas tropes entirely, including Dickensian settings and characters, the Grinch, and literal representations of Santa—especially if you need to attract multicultural audiences. Instead, use a contemporary setting and choose a different figure or metaphorical representation of these characters.



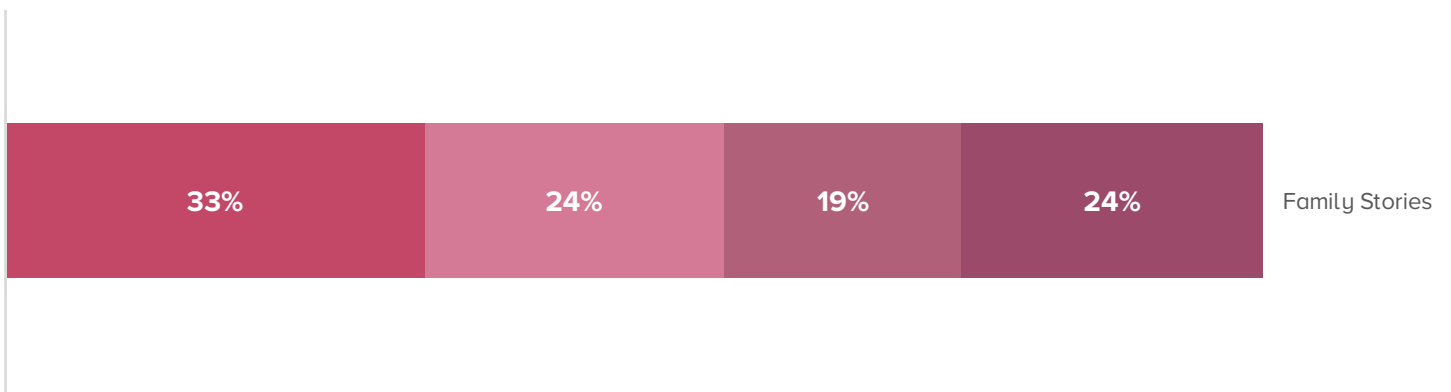
Family Stories

Family Stories feature frequently as a theme in holiday ads, with a variety of angles taken. Sub-themes include **Multi-generational**, **Humour** and **Reuniting Loved Ones**, the latter of which is favoured heavily by airlines and travel companies.

Ad Performance Spread

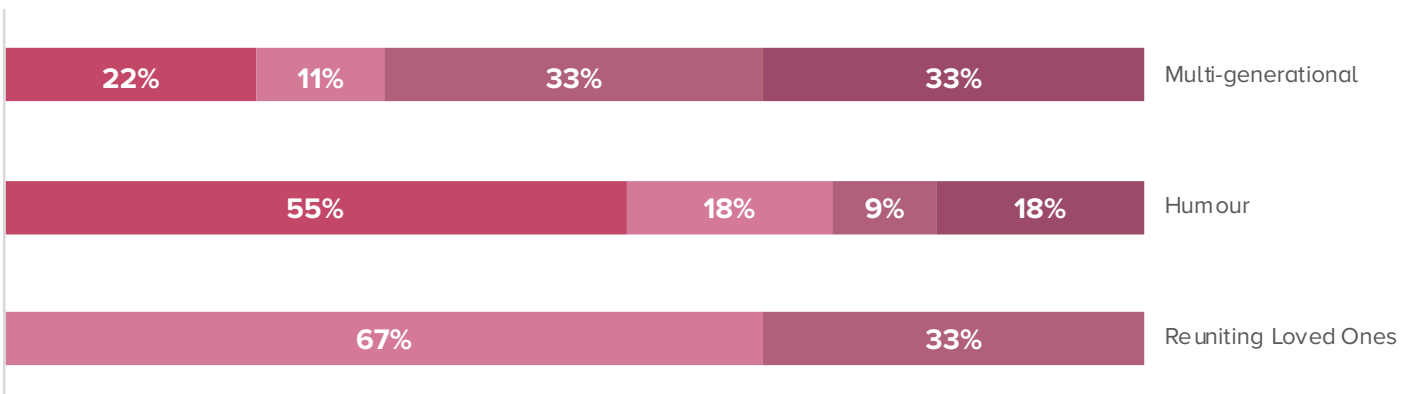
Distribution of Ad Performance for Family Stories (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



Distribution of Ad Performance by sub-theme (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



**It's important to note that 'Reuniting Loved Ones' does not have any creative in the 1st or 4th quartile.*

Family Stories

What works best

- **Diversifying focus on family relationships**
- **Humour/friendly banter**

Traditional family representations, especially around the holidays, can prompt heartwarming recollections, but they can also be difficult reminders of more challenging relationships and memories. Diversifying the representations of family—by including extended families, or friend and peer groups—can connect more deeply with a greater number of people. Making light of these sometimes complicated dynamics through friendly humour is another great tactic that lightens the holiday mood.

What underperforms

- **Narrow focus on family relationships**

Narrow definitions of family, on the other hand—like focusing exclusively on parent-child relationships—dampens neural engagement performance for holiday shoppers.



Screenshot: Olay, "PureWOW x Olay present the Holiday Musical: Have you heard about...?"

Family Stories: Multi-Generational

9
Ad Count

#13 to #77
Spread

30–193 seconds
Length

Holiday ads that focus on multi-generational family stories tend to be longer in length to provide space for the narrative and story arc. Both humour and emotional storytelling perform well in this category, but telling a heart-warming story well is challenging (the bottom four ads in this theme segment all have an emotional tone). Therefore, this theme is more risky, as only 2 of the 9 ads performed in the top 15 overall (Tesco at #13, and IKEA at #15), with the other 7 ads in the bottom half of the overall rankings.

What works best

- **Extended family relationships, including grandparent-grandchild**
- **Humour (family dynamics; sarcasm)**
- **Familiar music**
- **Diversity in casting/talent**

Extended family relationships

IKEA's "Magic Man" performs very well in this category, using a familiar Disney song, "Bibbidi-Bobbidi-Boo", to great effect. IKEA ranked highly across the board: #15 for NES Average, and #1 for both Max Connection and Max Encoding. The ad takes place in a multi-generational family home. It focuses on the unlikely perspective of the grandfather, who uses an IKEA 'hack' to support his grandson in making literal magic. The ad and its music parallels the "Bibbidi-Bobbidi-Boo" scene in *Cinderella*,



Screenshot: IKEA, "Magic Man"

where the fairy godmother transforms a pumpkin into a carriage and mice into horses so Cinderella can attend the ball. In the IKEA ad, the grandfather takes the role of the 'fairy godmother' and uses his 'magic' on a DIY IKEA hack—turning a shelving unit into a magic show prop for his grandson. Rather than the grandfather being a passive spectator (as older people are often depicted in advertising)⁵, he is the active force who works quietly in his 'workshop' to make 'magic' possible.

5. 'How to speak to Boomer audiences', Strategy Online, March 5th 2019 (<http://strategyonline.ca/2019/03/05/how-to-speak-to-boomer-audiences/>)

What underperforms

- **Prominent focus on parent-child relationship**
- **Animation**

Prominent focus on parent-child relationship

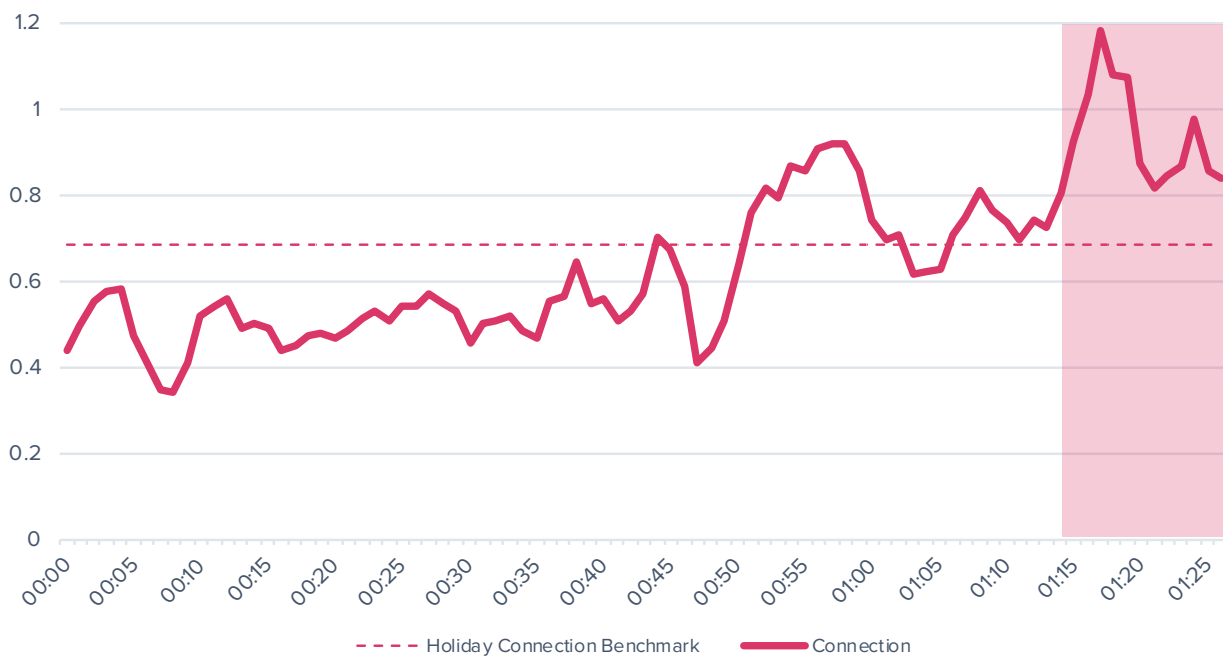
Three ads in this theme segment — Bouygues (ranked #68), Boots (#69) and IGA (#77) — all give prominent focus to an individual parent-child relationship, with an emotional tone and style. All three ads were longer in length, ranging from 85 seconds to 137 seconds, and perform in the bottom quartile overall.



Screenshot: Bouygues, "Come and Get Your Love"

Bouygues' Christmas ad, set to 'Come And Get Your Love' by Redbone, depicts the relationship between a father and son over time—from infancy, to the son becoming a father himself. It presents glimpses of this relationship in five different vignettes over the course of 30 years. The Redbone song is used as a common thread through the ad; the piece of music comes to play a significant role in the father-son relationship. The first 45 seconds of the 87-second ad failed to connect meaningfully with viewers. However, the ad's performance improved significantly towards the end, leading to a ranking of #8 overall for Max Connection. This spike in connection occurs during the last 10 seconds of the ad, when the father (now grandfather) receives a video call from his son with a baby in his arms. This final segment of the ad widens the family focus from two generations (parent-child) to three generations (grandparent-parent-child). It is the extension of the family—the transition of the son to a father, and the father to a grandfather—that connected most with viewers.

Bouygues, "Come and Get Your Love" - Second-by-Second trace for Emotional Connection



This finding underscores the importance of moving beyond the individual parent-child relationship to focus on the extended family in holiday advertising. A longer length, emotional ad must be able to connect meaningfully with consumers. While Bouygues performed well in the final ten seconds, Boots and IGA did not connect as meaningfully with viewers. Boots ranked #56 for Max Connection, and IGA ranked #60.

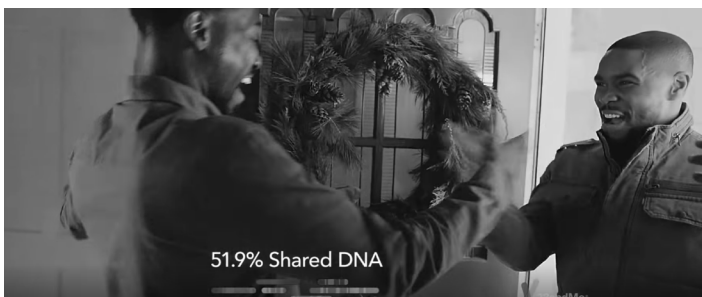
Get the most out of Multi-Generational Family Stories



When telling an emotional, heartwarming family story, diversify the family relationships being depicted. This broadens the opportunity for relatability. Narrowly focusing on an individual parent-child relationship is risky in holiday advertising. In the examples above, it has shown to dampen emotional connection with viewers, rather than enhance it.

Ads included in this sub-theme

- 23andMe, “The Gift for Everyone You Love”
- Barbour Christmas
- Boots, “Gifts that Get Them”
- Bouygues, “Come and Get Your Love”
- Canada Goose, “Generations of Warmth”
- IGA, “La Collation du Père Noël”
- IKEA, “Magic Man”
- PureWOW x Olay present “The Holiday Musical: Have you heard about...?”
- Tesco, “However You Do Christmas”



Screenshot: 23andMe, “The Gift for Everyone You Love”



Screenshot: Boots, “GiftsThatGetThem”

Family Stories: Humour

 **11**
Ad Count

 **#1 to #84**
Spread

 **6–193 seconds**
Length

Holiday ads that employ humour relating to family dynamics performed well overall, with 8 of 11 above NES baseline. Further, 6 of 11 ads in this theme segment were in the top 15 overall for NES Average, all of which were 60 seconds or less. The top performing brands in this sub-theme include President’s Choice, Shoppers Drug Mart, Tesco, and Olay, which all employ humour in different but relatable family situations during the holidays.

What works best

- **Candid/caught-on-camera humour, featuring kids**
- **Sarcastic banter and humour, relating to family dynamics**



Screenshot: President’s Choice, “When Kids Get in the Spirit”

Candid/caught-on-camera humour, featuring kids

The President’s Choice holiday campaign ads juxtapose user generated content (UGC) with polished holiday food spreads in 15-second and 30-second formats. The best performing ads in this campaign were 15 seconds in length and featured candid footage of funny moments with kids at Christmas (“When Kids Get in the Spirit”, “Not All Toys Work Out”, and “Cat’s Out of the Box”). However, the President’s Choice ads featuring adults did not perform well (see page 44-46 for additional analysis).

Sarcastic banter and humour

Sarcastic humour relating to family dynamics worked well for Shoppers Drug Mart, Olay, and Tesco. Tesco uses sarcastic banter among multiple family and friend groupings to great effect. These humorous exchanges appear authentic, set in home environments including the kitchen, dining room, and in the front yard. Shoppers Drug Mart uses sarcastic humour in the 6-second ads, “The Perfect Card” and “Mom’s Holiday Wishlist”. “The Perfect Card” plays on a relatable experience—writing a Christmas card on the way to a holiday event—and presents Shoppers Drug Mart as a convenient option for such last-minute holiday needs. Olay plays on the stereotypical expectations facing a

20-something woman at a holiday family gathering (i.e. relationship status, body image, reproductive status), using biting humour in exchanges between extended family members with Olay products used as a diversion technique.

What underperforms

- **Candid/caught-on-camera humour, featuring adults**

Candid/caught-on-camera humour featuring adults

While the President's Choice campaign performs well overall, two President's Choice ads landed in the bottom 10 per cent for NES Average. One ad shows a 'Grandma' dancing to electronic music, and the other features an adult dressed as Santa crashing into a Christmas tree on a hoverboard. These two ads performed significantly worse than the rest of the campaign, which features funny caught-on-camera moments with kids.

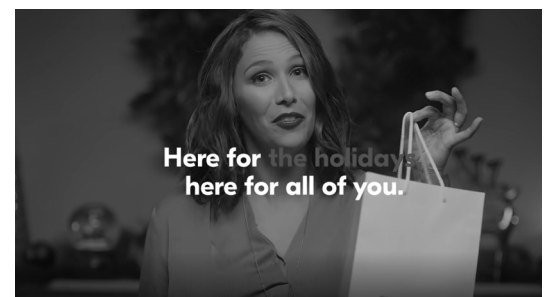
Get the most out of Humorous Family Stories

Humorous family stories perform well overall. When taking a humorous approach, play up stereotypical family dynamics through sarcasm and banter, in an at-home setting. Feature funny moments centred around kids during the holidays, but avoid these 'Funniest Home Videos' style features with adults at the center.



Ads included in this sub-theme

- President's Choice (7 spots)
- PureWOW x Olay present "The Holiday Musical: Have you heard about...?"
- Shoppers Drug Mart, "Mom's Holiday Wishlist"
- Shoppers Drug Mart, "The Perfect Card"
- Tesco, "However You Do Christmas"




Screenshot: Shoppers Drug Mart, "Mom's Holiday Wishlist"

Family Stories: Reuniting Loved Ones

 **3**
Ad Count

 **#29 to #63**
Spread

 **95–257 seconds**
Length

Several airlines focus on reuniting loved ones at the holidays in long form, emotional spots. WestJet, Heathrow, and Air Transat all used this theme with varying success.

What works best

- **Reunions of friends and romantic partners**
- **Real-life reunions of loved ones**

Reunions of friends and romantic partners

Despite being quite long, at 4 minutes and 17 seconds, the WestJet “Uniting Traditions” ad performed relatively well, ranking at #29 for NES Average. In addition, the Max Attention, Connection, and Encoding for the WestJet spot ranked in the top 10 overall. The ad shows three family reunions: a mother and father reunited with their adult daughter, a couple reunited with their best friends, and a girlfriend reunited with her boyfriend. Emotional Connection for viewers peaked during the friends’ reunion and girlfriend-boyfriend reunion, but not for the parent-child reunion. This supports another finding of this report: exclusive focus on the parent-child relationship generally underperforms. For WestJet, diversifying the relationships presented in the ad performed better overall.



Screenshot: Heathrow, “Heathrow Bears Return”

Real-life reunions of loved ones

Real-life reunions of humans perform better than reunions of CGI characters. The “Heathrow Bears Return” ad ranked in the middle of the pack at #38 for NES Average. It features CGI plush bears (that have appeared in Heathrow’s holiday campaign since 2016), who travel from Florida back to the UK to be with their children and grandchildren at the holidays. However, moments designed to spark emotion

(i.e. Grandma bear reunited with her grandbaby) do not connect with viewers. Instead, it is the closing seconds of the ad where Connection peaks with the message ‘Making It Home Makes It Christmas’, and the transition from the plush bears to the reunion of a human family.

What underperforms

- **Suggesting a reunion of loved ones, but not showing it on screen**

Suggesting a reunion, but not following through on-screen

Air Transat's "The Cure for Homesickness" did not perform well, ranking #63 for NES Average. Over two minutes in length, it set up a surprise reveal of plane tickets home to several Brits living in Canada. The free ticket 'surprise' reveal comes late in the ad, at roughly the 100 second mark. The ad doesn't show any of the family reunions, only hinting that they will take place after distributing plane tickets. While very similar in theme to WestJet, the pacing and the reveal for Air Transat fell flat. By not delivering on the emotional reunion, which drove peaks in emotional Connection for WestJet, Air Transat missed an important opportunity to connect with consumers.



Screenshot: Air Transat, "Cure for Homesickness"

Get the most out of Reunited Loved Ones

Real-life reunions depicting multiple types of love relationships perform well. Hinting at a reunion is not enough—it has to be seen. CGI character storylines should be balanced with human ones, which drive greater emotional connection.



Ads included in this sub-theme

- Air Transat, "Cure for Homesickness"
- Heathrow, "Heathrow Bears Return"
- WestJet Christmas Miracle, "Uniting Through Traditions"





Women's Identities

Various advertisers explored this theme, including those from women's apparel, beauty goods and retail. Striking the right tone, and providing enough context prove to be key in succeeding.

Women's Identities

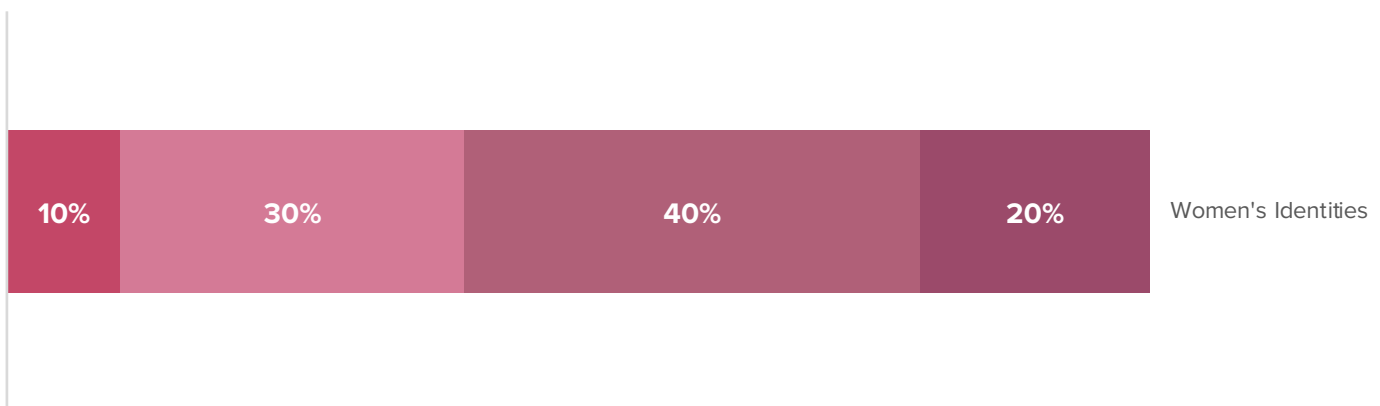
 **10**
Ad Count

 **#12 to #86**
Spread

 **15–193 seconds**
Length

Distribution of Ad Performance for Women's Identities (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile

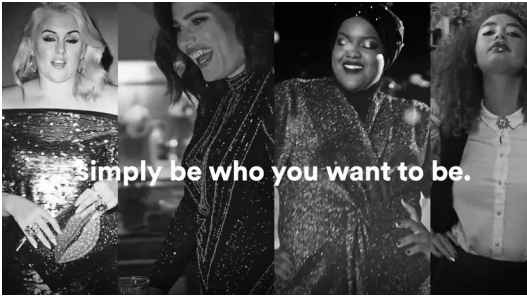


What works best

- **Depicting the multiple identities and lifestyles of women**
- **Women celebrating the holidays together**
- **Humorous, relatable scenarios**

Multiple identities

Both Shoppers Drug Mart and TJ Maxx approach this theme by showing the multiple identities of women. In Shoppers' "Holiday Motivational Speech" ad (30-second version), the main character gives a pep talk to a room of seven different versions of herself getting 'holiday ready'—including baking at home, attending a work party, and doing a face mask. A humorous take on a coach talking to a team before a big game, the main character tells the various versions of herself, "We may feel like we're barely holding it together, but inside every last one of you I see some holiday cheer". The ad emphasizes the many roles that women (are expected to) play during the holidays, and positions Shoppers as the go-to destination to fulfill these roles (including having an extra toothbrush on hand for last-minute guests).



Screenshot: Simply Be

Women celebrating together

Women shown celebrating together performs better than women celebrating the holidays individually. JD Williams (#42) and Simply Be (#62) are both UK-based retailers of women's plus size apparel, and they delivered very similar holiday ads. Both retailers focus on women wearing fashionable holiday party clothes. The cast of Simply Be appear to be under 35 years old, while JD Williams focuses

on the 40+ age group. JD Williams shows the women both as individuals and celebrating together in a group, while Simply Be shows the women only as individuals. While the former performs around average, the latter is approaching the bottom quartile of poorest performers.

Humorous, relatable scenarios

Olay's "Have You Heard About...?" holiday musical ad took a much different approach. A long-form ad at 193 seconds, it was in the bottom half for NES Average at #50, but ranked #11 for Max Connection. The ad uses humour derived through family dynamics—with passive aggressive comebacks and Olay products as a diversion. The central character, a young, professional woman is armed with a basket of Olay products to dole out to family members peppering her with questions and comments about her body, her love life, and her work life. It's funny, cheeky, and is able to exhibit 'how to' application techniques of the products through song.

What underperforms

- **Oversimplifying women's identities**

Over simplifications of women's identities

Ads that focus on women's identities as a theme perform best at 30 seconds in length or longer. For campaigns with both 30-second and 15-second versions of the same ad, the 30-second spots beat out their 15-second versions. Shoppers Drug Mart's 30-second "Holiday Motivational Speech" topped the women's identities segment, ranking #12 overall for NES Average. However, two different 15-second versions of this ad did not perform as well (ranking #32 and #49 overall for NES Average), and a similar Shoppers' 15-second holiday ad ("Beauty Holiday") ranked even lower at #64 for NES Average. Similarly, TJ Maxx's 30-second "Something for Every You" came in at #23, but two 15-second versions of the ad performed poorly, ranking near the very bottom at #78 and #86.



Screenshot: Shoppers Drug Mart, "Holiday Motivational Speech"

Representing the complexity of women in holiday advertising requires more context than 15 seconds typically allows. This theme works best when it is given the necessary time to build context and connection (30+ seconds).

Get the most out of Women's Identities



When speaking directly to women consumers, highlight the different identities of individual women, the multiplicity of women's identities and lifestyles more broadly, and/or the different roles that women (are expected to) perform during the holidays. When focusing on women's identities as a theme, depict female friendship and socialization during the holidays (even if this is a woman talking to herself) rather than individual experiences.

Ads included in this theme

- JD Williams
- PureWOW x Olay present "The Holiday Musical: Have you heard about...?"
- Shoppers Drug Mart, "Beauty Holiday"
- Shoppers Drug Mart, "Holiday Motivational Speech" (30s)
- Shoppers Drug Mart, "Pharmaprix Holiday Motivational Speech" (15s)
- Shoppers Drug Mart, "Pharmaprix, Holiday Motivational Speech" Version 2 (15s)
- Simply Be
- TJ Maxx, "Something for Every You" (30s)
- TJ Maxx, "Something for Every You" (15s)
- TJ Maxx, "Something for Every You" Version 2 (15s)



Screenshot: JD Williams



Screenshot: TJ Maxx, "Something for Every You"



Internet/Meme Culture

Used by a small number of brands in retail, food and payments, this theme proved risky, but also quite successful in capturing neural engagement of holiday shoppers.

Internet/Meme Culture



17
Ad Count



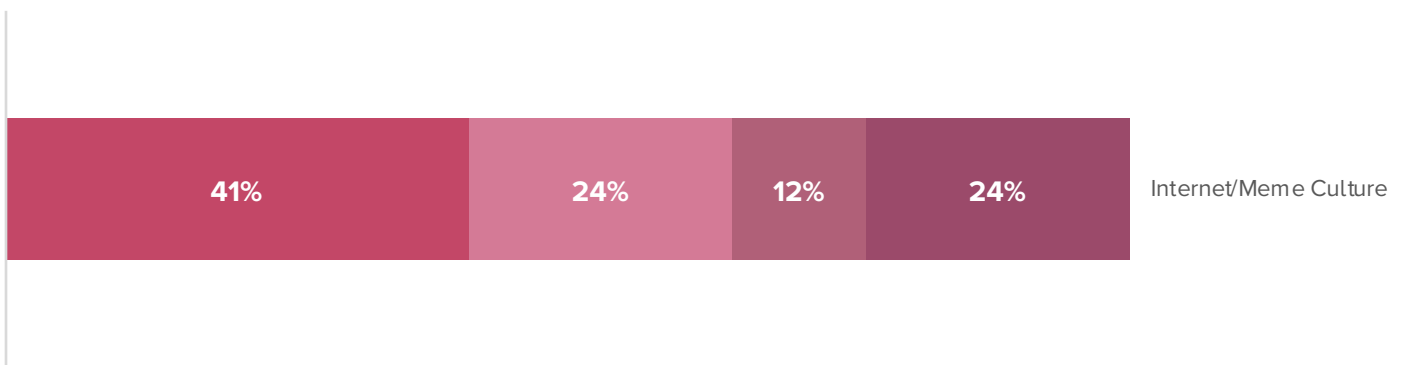
#1 to #88
Spread



15–30 seconds
Length

Distribution of Ad Performance for Internet/Meme Culture (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



Ads that utilize internet and meme culture have the potential to perform really well, but also risk performing poorly. Both the top spot and the bottom spot in our analysis featured this theme. Seventeen holiday ads made use of internet/meme culture, including the President’s Choice campaign (7 ads), the TJX campaign (8 ads), and the Interac campaign (2 ads). Of these 17 ads, 4 performed very well, ranking in the top 5 overall for NES Average. However, 3 of the 17 ads fell into the bottom 6 overall for NES Average.

What works best

- **15 seconds**
- **Candid/caught-on-camera humour, featuring kids**
- **Ironic humour**

15-second spots

15-second ads perform better than their extended 30-second versions across three campaigns in this theme. Furthermore, the top four ads in this segment are all 15 seconds long.

In the President's Choice campaign, the 15-second spots performed better overall than the 30-second ads. For example, the 15-second version of "Not All Toys Work Out" ranked #5 overall for NES Average, while the extended 30-second version ranked #27 overall for NES Average.

Similarly, with Interac's "Poop Emoji Pillow" ads—the 15-second spot ranked #30 overall for NES Average, while the extended 30-second version ranked #73. This discrepancy in performance is considerable—the difference between an above-average ad and an ineffective one.



Screenshot: Interac, "Emoji Pillow"



Screenshot: President's Choice, "Not all toys work out"

Candid/caught-on-camera humour, featuring kids

The user-generated content leveraged by the PC ads features a range of home-video content. The best of these feature kids. For example, "When Kids Get in the Spirit", which ranked in the top quartile for NES Average, shows a young child dancing wildly in part of a Santa Claus outfit. "Not All Toys Work Out" leverages content from a viral video of a young girl whose toy mechanical fairy flies into the fire.

Those PC ads that featured adults (like "Santa's got a new ride" and "Grandma's got some dance moves"), on the other hand, did not perform as well, ranking in the bottom quartile for average neural engagement scores.

What underperforms

- **30 seconds**
- **Candid/caught-on-camera humour, featuring adults**

30-second spots

Internet/meme culture is brief and 'snackable', which can explain why longer, 30-second spots perform poorly compared to 15-second spots. The theme simply does not require more time to communicate.

Get the most out of Internet/Meme Culture



When employing an internet/meme culture theme, keep the ad length brief. Integrate the joy of the holiday season—through child humour, or the thrill of shopping—and include close-up product shots for best performance.

Additional considerations

The tactics deployed by PC Brand—opening their ads with holiday memes/UGC before cutting to the commercial bit of the ad—were novel in 2018. This ‘attention hack’ tactic used a familiar internet visual (goofy, topical UGC content) to bait viewers in, before quickly switching to the product/commercial message and then switching back to the user content for the ad’s ending. This tactic was polarizing—yielding both high-performing and low-performing ads in the campaign—with performance heavily-reliant on the specific UGC videos sourced for the campaign. It’s also risky for brands that want to be perceived as premium to use this grainy, low-quality video in their brand communications. Use this tactic with caution.

Ads included in this theme

- Interac “Pillow” (15s)
- Interac “Pillow” (30s)
- President’s Choice (7 spots)
- TJX *Offline Shopping* (8 spots)



Screenshot: President’s Choice, “When kids get into the spirit”



Screenshot: President’s Choice, “Santas got a new ride”



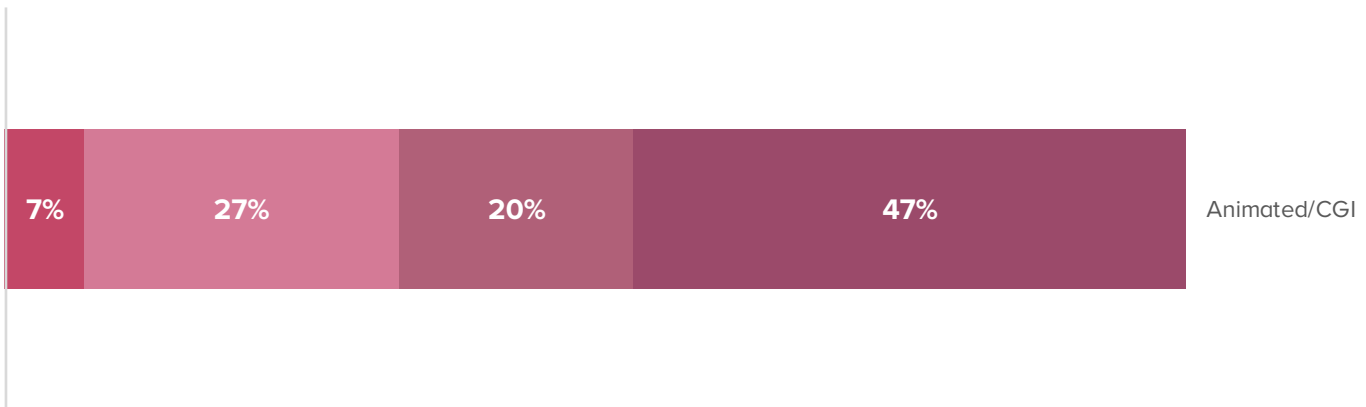
Style

In addition to thematic content, the style of the ads was analyzed—with particular attention to ads that integrate **animation** and **computer generated imagery (CGI)**.

Ad Performance Spread

Distribution of Ad Performance by Style (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



**It's important to note that nearly half of the ads in this style ranked in the bottom quartile.*

Predominant use of animation and CGI effects appears in 15 ads, to varying degrees. For example, Walmart's "Bring Holiday Magic Home" integrates a CGI character by animating a plush bear within a real store setting, while IGA's "La Collation du Père Noël" is entirely animated. We break out this section into two parts: Integrated CGI and Full Animation.


The majority of ads that use animation and CGI are longer form (13 of 15 ads in this segment are over 60 seconds), which means a substantial production budget commitment.

Overall, CGI and animation did not perform well. Only one ad that utilized CGI or animation (TK Maxx, "The Never-ending Stocking") appears in the top 25 ads overall for NES Average. However, those ads featuring Integrated CGI perform substantially better than those that are fully animated. On balance, however, an investment in this style of holiday ad is high risk.

Integrated CGI

 **10**
Ad Count

 **#10 to #80**
Spread

 **40–109 seconds**
Length

The integration of CGI components works in some instances and has the potential to pay off. This involves using computer-generated imagery alongside ‘true-to-life’ film.

What works best

- **CGI character that is relatable or engaging**
- **CGI character that interacts in familiar, real-life settings (i.e. at home with a family)**

Both TK Maxx’s “The Never-ending Stocking” and Walmart’s “Bring Holiday Magic Home” ranked in the top 10 for Max Connection and Encoding. In these instances, the brands featured a CGI character that is relatable or engaging, benevolent, interacts in real-life settings, and becomes part of a family. The gift-burping TK Maxx Stocking showers a family with gifts, while the lonely Walmart bear reads ‘self-help’ books and eats Haagen Dazs ice cream before finding its forever home.



Screenshot: Walmart Canada, “Bring Holiday Magic Home”

CGI character that is relatable or engaging

Walmart Canada’s “Bring Holiday Magic Home” ranked #33 for NES Average, but was #6 for both Max Connection and Max Encoding. The ad is set to Sam Cooke’s song “Bring It On Home to Me”, and features a CGI plush teddy bear who is looked over on Walmart’s shelves by consumers who are buying up new and trendy toys. When Walmart closes, the one lone teddy bear spends the evening walking the

dark aisles, reading self-help books, indulging in ice cream, and trying to discover how to become a more desirable gift—until one day a father joyfully pulls the bear off the shelf, bringing it home to the delight of a little girl and the bear (who has finally found a home). The characterization of the benevolent bear is relatable and is based on the very human desire to be accepted and loved. Unlike the other toys lining the aisles of Walmart, the bear has ‘character’ and comes to life after dark. In a sea of mass produced goods, the teddy bear is the one unique individual toy. In this respect, the narrative of the ad is counter to Walmart’s actual offerings, but it effectively generates empathy for the bear as viewers are rooting for the bear to be ‘adopted’ in time for the holidays.

Other ads that feature CGI characters, including the Barbour “Snowman” ad, Aldi’s “Kevin the Carrot”,

and the 23andMe “Grinch” do not perform well, falling in the bottom half overall for NES Average and Max Emotional Connection. Amazon’s “Can You Feel It”, which features singing Amazon boxes, falls in the middle of the pack overall, at NES Average #34, Max Connection #24 and Max Encoding #74. Interestingly, the Argos “Christmas Fool” and the KFC Chicken ranked in the top 15 overall for Max Connection, even though they are in the bottom quartile for NES Average.

These findings demonstrate the potential—both positive and negative—of featuring a computer-animated main character.



Screenshot: Amazon, “Can You Feel It”

KFC’s UK ad, featuring a chicken trekking across snowy plains, did not perform well overall (ranking #75 for NES Average). However, it ranked in the top 15 for Max Connection and Encoding. The face-off between the chicken and turkey adds humour to the ad, but the pacing of the 60-second spot is problematic. The face-off between the chicken and turkey doesn’t begin until more than halfway through the ad—there is a very long build-up while the chicken marches solo across great snowy forests and plains set to Western-film inspired instrumental music.

What underperforms

- **CGI effects that do not align with the brand**



Screenshot: LEGO, “This is not a Brick. It’s Their Wildest Dreams”

CGI effects that do not align with the brand

LEGO’s “This is not a Brick. It’s Their Wildest Wishes” uses CGI effects to create a video-game-inspired setting. The ad performed poorly ranking at #80 overall for NES Average. It takes the simplicity of playing LEGO and turns it into a CGI video-game race and flight through the high-rises of a city. Both girls and boys are featured in the ads, along with parents and grandparents. The hands-on mechanics and

creativity that LEGO products are designed to foster seems in opposition to a video-game focused childhood. It was an unusual approach, with messaging and imagery that is counter to its brand—and it didn’t pay off.

Ads included in this segment

- Aldi, “Kevin the Carrot” Christmas Cliff Hanger Advert
- Amazon, “Can You Feel It”
- Argos, “The Christmas Fool”
- Barbour, “Snowman”
- GovSingapore, “Kungfu Fighter, Hidden Sugar”
- Heathrow, “The Heathrow Bears Return”
- KFC UK Christmas Advert
- LEGO, “This is not a Brick. It’s Their Wildest Wishes”
- TK Maxx, “The Never-ending Stocking”
- Walmart Canada, “Bring Holiday Magic Home”



Screenshot: Barbour, “Snowman”

Full Animation



5

Ad Count



#56 to #85

Spread



30–172 seconds

Length

Full animation does not perform well overall. Five ads were entirely animated and all ranked in the bottom half of the ads analyzed. These include Apple’s “Share Your Gifts” (NES Average #56), Iceland Food’s ‘Say Hello to Rang-tan’ (#70), 23andMe’s “Discover the Grinch’s DNA Story” (#71), IGA’s “La Collation du Père Noël” (#77), and Emirates NBD “Give in to Giving” (#85). These animated ads did not score well on Max Connection or Encoding.

What works best

No fully animated ad performed meaningfully above average

What underperforms

- **Long-form storytelling (100 seconds+)**
- **Prominent instrumental music**
- **Unlikeable main character**

Long-form storytelling

Apple’s “Share Your Gifts” is a long-form animated ad that tells an emotional story about an introverted and shy young woman who keeps her talents to herself—until one day her dog opens the window for all of her work to blow into the streets, where the community catches the pieces of paper and comes together to appreciate her talent. The spot earned plaudits from the advertising trade press⁶, but failed to connect with the holiday shopper in any meaningful way. Set to an original song composed for the ad by Billie Eilish, the 172-second spot failed to connect with viewers, ranking in the bottom quartile for highest connecting moment (Max Connection: #73). It was also soft in memorability, ranking 64th for Max Encoding moments. Each CGI and animated ad that exceeded 100 seconds performed well below benchmark.

Unlikeable main character

Viewers need to be able to empathize with a likeable character. Emirates NBD “Give In To Giving” performed very poorly, ranking #85 for NES Average. The ad is 138 seconds in length and depicts a man who is unwilling to help others (ie. not holding the elevator door, not catching a balloon that has floated away from a little girl, not grabbing a runaway shopping cart). Halfway through the ad, the main character does an about-face in his approach to life after reluctantly walking an elderly woman across a busy street, and saving her from a speeding car. This charitable experience appears to have changed the main character entirely: his body language becomes more open, he holds elevator doors, catches balloons, and volunteers his time with children and in retirement homes. The final scene of the ad shows the main character pretending to have a visual impairment —wearing sunglasses and holding a white cane — as a means to persuade a man (in whom he sees his previous self) to help him cross the street. While spikes in emotional Connection were seen during the brand plate in the final seconds of the add, such peaks in Connection were not evident through the narrative of the ad, suggesting that viewers did not connect with the main character.



Screenshot: Apple, “Share Your Gifts”



Screenshot: Emirates NBD, “Give In To Giving”

6. ‘Apple’s Gorgeously Detailed Holiday Ad Has a Moral That All Creatives Should Take to Heart’ (<https://www.adweek.com/brand-marketing/apples-gorgeously-detailed-holiday-ad-has-a-moral-that-all-creatives-should-take-to-heart/>)

Ads included in this segment

- 23andMe, “The Grinch’s DNA Story”
- Apple, “Share Your Gifts”
- Emirates NBD, “Give in to Giving”
- Iceland Foods, “Say Hello to Rang-tan”
- IGA, “La Collation du Père Noël”

Get the most out of Animation/CGI



Animated holiday ads are high risk. Overall, they perform poorly across NES Average, Max Connection, and Max Encoding. The integration of some CGI elements has the potential to engage consumers, working best with a relatable or interesting/engaging CGI character who is benevolent and interacts with people in familiar settings. Avoid full animation, particularly in lengthy ads.



Screenshot: KFC UK Christmas Advert



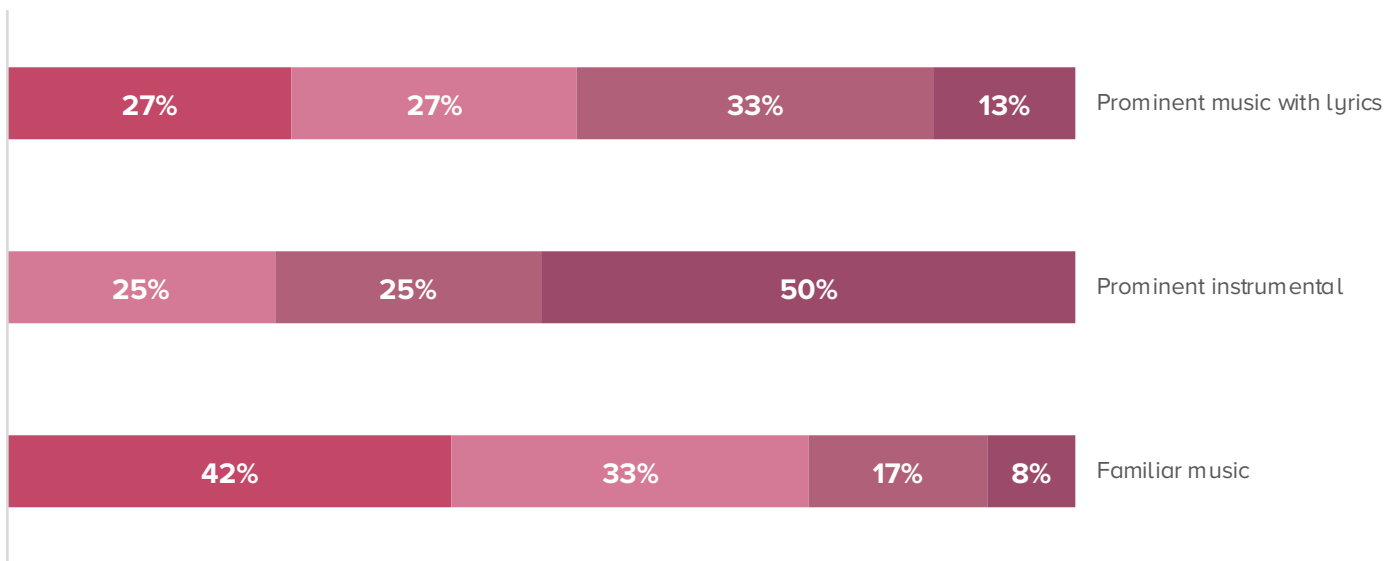
Music

Music plays an important role in holiday advertising, whether as background to set the tone or as a prominent feature to narrate the story.

Ad Performance Spread

Distribution of Ad Performance by Music Style (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



**It's important to note that 'Prominent instrumental' music has no creative in the 1st quartile.*

The ads were categorized based on the following: background instrumental, prominent instrumental, and prominent music with lyrics. This was further analyzed based on the tone (i.e. bright and positive, slow, or melancholy), and the cultural familiarity with the music (i.e. Disney, popular music).

The majority of ads use background music to support dialogue and voiceover. This section focuses on the cases in which the musical selection plays a prominent feature in the ad—often taking the place of dialogue and voiceover—and playing a 'character' in narrating the story of the ad.

Prominent Music with Lyrics



14
Ad Count



#10 to #69
Spread



30–193 seconds
Length

Of the 14 ads that utilized prominent music with lyrics, only 4 scored in the top 25 for NES Average: TK Maxx, “The Never-ending Stocking”, IKEA, “Magic Man”, Cadbury, “Secret Santa”, and Nordstrom, “Let’s Go Gifting”.

What works best

- **Upbeat pace**
- **Familiar music that provokes nostalgia**

What underperforms

- **Slow pace**
- **Melancholy tone**


Ads (and their music) included in this sub-segment

- Amazon, “Can You Feel It”: “Can You Feel It,” cover of The Jacksons (1980)
- Apple, “Share Your Gifts”: “Come Out and Play”, Billie Eilish (song composed for ad)
- Boots, “Gifts That Get Them”: Original song scored for ad
- Bouygues: “Come and Get Your Love”, Redbone (1974)
- Cadbury, “Secret Santa”: “Do you Want to Know a Secret”, The Beatles cover by Mathilda Homer (original, 1963; cover recorded for the ad)
- “Heathrow Bears Return”: “Every Time You Go Away”, Paul Young (1984)
- IKEA, “Magic Man”: “Bibbidi-Bobbidi-Boo”, Disney’s Cinderella (1950)
- JD Williams: “Good as Hell”, Lizzo (2016)
- John Lewis, #EltonJohnLewis: “Your Song”, Elton John (1970)
- Nordstrom, “Let’s Go Gifting”: “Go! Go! Go!”, Dean Martin (1951)
- PureWOW x Olay present “The Holiday Musical: Have you heard about...?”: Original song scored for ad
- Sainsbury’s, “The Big Night”: “Get What You Give”, cover of New Radicals performed by children
- TK Maxx, “The Never-ending Stocking”: “Cuban Pete”, version similar to Jim Carrey in The Mask (1994)
- Walmart Canada, “Bring Holiday Magic Home”: “Bring it on Home to Me”, Sam Cooke (1962)

Prominent Instrumental (no dialogue)

 **4**
Ad Count

 **#25 to #85**
Spread

 **84–138 seconds**
Length

Ads with prominent instrumental music that was designed to help carry the story, without the support of voiceover or dialogue, do not generally perform well. While Cineworld ranked in the top 25 for average NES, the three other ads that use prominent instrumental (all over 109 seconds long) were in the bottom half of the ranking. Barbour, IGA, and Emirates NBD all use long-form storytelling ads with an emotional/heart-warming tone; both IGA and Emirates NBD are entirely animated.

What works best

- **Diverse, human cast/talent**
- **Metaphorical Santa (Mary Poppins in Cineworld)**

What underperforms

- **Prominent instrumental, no dialogue**
- **Long-form storytelling (over 100 seconds)**
- **Animation**

Ads included in this sub-segment

- Barbour: “The Snowman”
- Cineworld, “Practically Perfect”
- Emirates NBD, “Give in to Giving”
- IGA, “La Collation du Père Noël”



Screenshot: Barbour: “The Snowman”



Screenshot: Cineworld, “Practically Perfect”

Familiar Music



12
Ad Count



#10 to #66
Spread



30–140 seconds
Length

Familiar music, including popular contemporary music, popular music from decades past, and music that evokes a sense of nostalgia (ie. classic Disney movies), has the ability to make a meaningful emotional connection with consumers, but it's risky. There is a high potential for a familiar song to connect meaningfully with a consumer, but this potential has to be balanced with the investment cost of licensing. Of the 12 ads that used popular or familiar songs, 5 ranked in the top 10 overall for maximum emotional Connection. Similarly, 5 of the 12 ads ranked in the top 10 overall for max Encoding to memory. However, only one ad ranked in the top 10 for NES Average, and 6 of 12 ads performed below NES Average baseline.

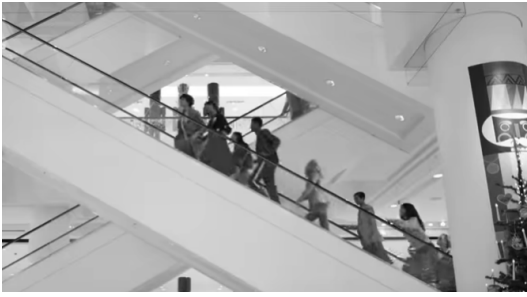
What works best

- **Lyrics/message supporting ad storyline**
- **Upbeat pace**
- **Familiar music that provokes nostalgia**

Lyrics/message supporting ad storyline

The ads that ranked highest for NES Average include TK Maxx's "The Never-ending Stocking" ("Cuban Pete"), Tesco's "However You Do Christmas" ("Go Your Own Way"), IKEA's "Magic Man" ("Bibbidi-Bobbidi-Boo"), Cadbury's "Secret Santa" ("Do You Want to Know a Secret"), and Nordstrom's "Let's Go Gifting" ("Go! Go! Go!"). In all five of these examples, the music is familiar and helps narrate the story through the song's meaning and association.

Tesco's "However You Do Christmas" is an interesting example of the alignment of musical message and ad narrative. By using an instrumental version of Fleetwood Mac's "Go Your Own Way" in the background of the ad, the song plays a more subtle role while still supporting the ad's narrative based around both inclusiveness and individuality.



Screenshot: Nordstrom, "Let's Go Gifting"

Nordstrom's "Let's Go Gifting" performed well overall (NES Average #19). Dean Martin's "Go! Go! Go!" was a smart musical choice for this ad. By using Dean Martin the ad references the classic Christmas crooner sound without being 'on the nose' about Christmas. "Go! Go! Go!" has a fun and upbeat tone that aligns with the aim and message of the ad.

Upbeat, positive tone

While the best performing ads in this segment have an upbeat and positive tone (see above examples), simply choosing a peppy song obviously does not guarantee success. There are two notable examples of upbeat, familiar songs that performed at or below average: Sainsbury's "Big Night", which features "You Only Get What You Give", and the Bouygues ad, which features "Come and Get Your Love" by Redbone, which ranked #68 for NES Average.

What underperforms

- **Melancholy, sad tone**
- **Lyrics/message that do not align with ad narrative**

While ads set to familiar music have the potential to connect well with viewers, the tone of the song and the way in which it aligns with the story narrative are critical to performance: 6 of 12 ads ranked in the bottom half for NES Average. Ads that performed below average include Sainsbury's "The Big Night", John Lewis, "#EltonJohnLewis", Bouygues, and "Heathrow Bears Return".

Melancholy, sad tone

The "Heathrow Bears Return" is set to Paul Young's melancholic 1984 song, "Every Time You Go Away". Despite the Bears being reunited with their family at the end of the ad, the sad/melancholy tone of the song carries through the entire ad and doesn't align with the heartwarming reunion that happens on screen.

Lyrics/message that do not align with ad narrative

As mentioned in the Gift Giving theme section, while Elton John's "Your Song" is familiar, it doesn't help tell the story in the holiday John Lewis ad, which was designed more as a trailer for the Elton John biopic *Rocketman* than a holiday advertisement for the retailer.

Ads included in this sub-segment

- Amazon, “Can You Feel It”
- Bouygues, “Come and Get Your Love”
- Cadbury, “Secret Santa”
- “Heathrow Bears Return”
- IKEA, “Magic Man”
- JD Williams
- John Lewis & Partners, “#EltonJohnLewis”
- Nordstrom, “Let’s Go Gifting”
- Sainsbury’s, “The Big Night”
- TK Maxx, “The Neverending Stocking”
- Tesco, “However You Do Christmas”
- Walmart Canada, “Bring Holiday Magic Home”

Get the most out of Music



Music licensing can be expensive, so you want to ensure it works to tell your brand story, not detract from it. Careful selection of upbeat music to enhance the core narrative — like in IKEA’s “Magic Man” or TK Maxx’s “The Never-ending Stocking” — or subtly reinforce the core message (like in Tesco’s “However You Do Christmas”), can help to ensure advertisers are maximizing their return on this investment—both in music, and a holiday ad more broadly.



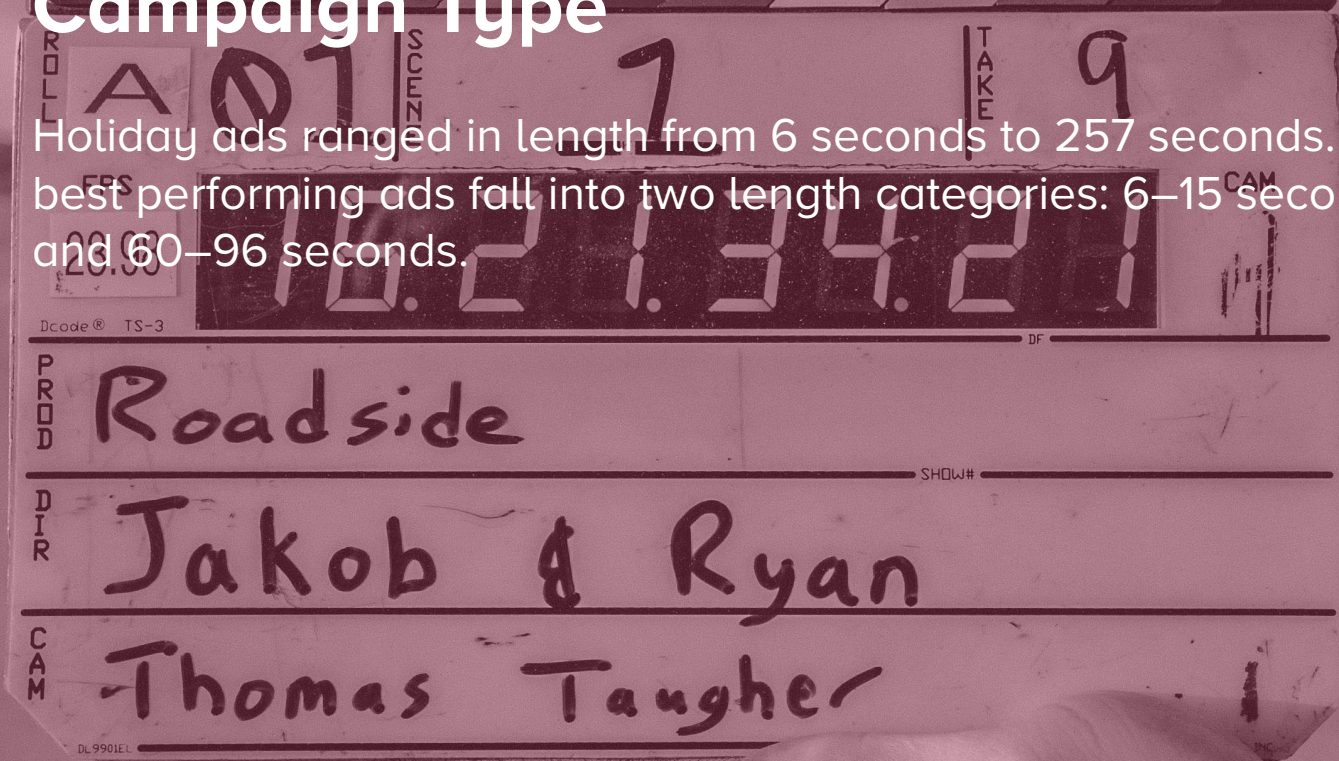
Screenshot: IKEA, “Magic Man”



Screenshot: TK Maxx, “The Never-ending stocking”

Media Formats: Ad Lengths + Campaign Type

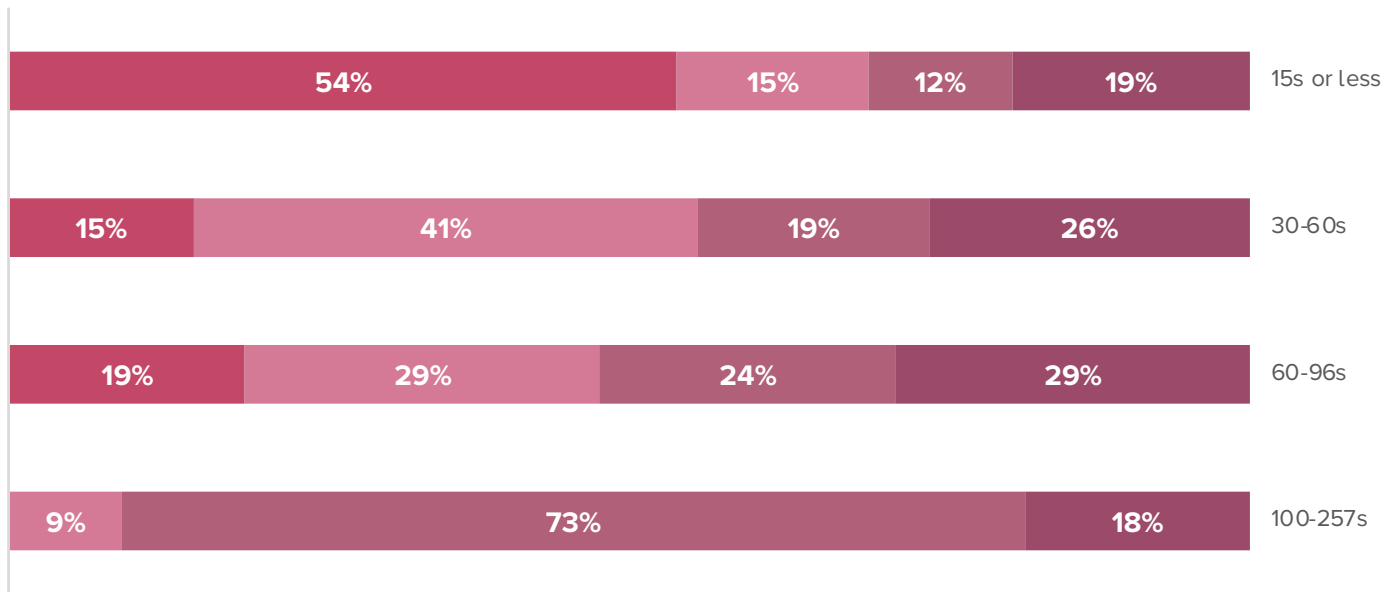
Holiday ads ranged in length from 6 seconds to 257 seconds. The best performing ads fall into two length categories: 6–15 seconds, and 60–96 seconds.



Ad Performance Spread

Distribution of Ad Performance by Ad Length (NES Average ranking)

■ 1st Quartile ■ 2nd Quartile ■ 3rd Quartile ■ 4th Quartile



**It's important to note that ads '100-257s' have no creative in the 1st quartile.*

Ad Length: 15 seconds or less

 **26**
Ad Count


 **#1 to #86**
Spread


 **6-15 seconds**
Length

The 6 to 15-second ads include multi-video campaigns from President's Choice, TJX, Shoppers Drug Mart, and TJ Maxx, as well as single ads by Nordstrom, Walmart and Interac. The majority of these ads are product-focused, and the best performers put a humorous spin on internet/meme culture. 15-second spots that focus on women's identities (Shoppers, TJ Maxx) do not perform as well as their 30-second versions. In these instances, when the intent of the ad is to highlight the multiple identities of women and how the brand's products speak to these different identities, this goal is better achieved in 30 seconds. The shortened ads lose the message.

Ad Length: 30–60 seconds

 **27**
Ad Count

 **#12 to #88**
Spread

 **30–60 seconds**
Length

The 30 to 60-second ads include campaigns for Starbucks, TJ Maxx, TJX, Shoppers Drug Mart, President's Choice, Emirates Airline, 23andMe and Waitrose; single ads for People's Postcode Lottery (NES Rank: 18), Nordstrom, Currys PC World, JD Williams, Asda, Fortnum & Mason, and Simply Be.


For multi-video campaigns, the 30-second ads often perform worse than their 15-second versions. This is true for the TJX campaign and the Interac 'Poop Emoji Pillow' ads. However, ads that focus on women's identities and multiculturalism perform well as 30-second spots.

Many of the ads in this length category are impressionistic in style, designed to capture the feeling of an experience (i.e. Nordstrom, JD Williams, Asda, Simply Be), without being tied to a specific product or narrative.

Ad Length: 60–90 seconds

 **21**
Ad Count

 **#10 to #87**
Spread

 **60–90 seconds**
Length




Screenshot: TK Maxx, "The Never-ending Stocking"

The benefit of engaging consumers with a longer form, storytelling ad is in the potential payoff for emotional connection and encoding to memory. Although only one of these longer form ads ranks in the top 10 for NES Average, 9 of the 21 ads are in the top quartile for Max Connection, and 10 of 21 are in the top quartile for Max Encoding. The best performing ads in the 60 to 96-second length use narrative storytelling effectively, employ familiar music to help carry the storyline, and focus on family (i.e. IKEA, TK Maxx, Tesco).

Ad Length: 100–257 seconds

 **11**
Ad Count

 **#29 to #85**
Spread


 **100–257 seconds**
Length

These ‘short film’ style ads showed mixed performance. While 10 of 11 ranked in the bottom half for neural engagement scores, 4 of 10 scored in the top 15 for Max Connection (including Sainsbury’s, WestJet, and Olay).

The majority of these ads (9 of 10) took an emotional/heartwarming story-telling approach. Only Olay took a humorous approach with the ‘Holiday Musical’. Olay is also the only ad in this segment that focuses on a product. The other 9 ads tell stories around the brand, but do not focus on physical products they are selling.

The two bottom performing ads in this segment were entirely animated (IGA, Emirates NBD). Ads longer than 100 seconds do not perform well overall when considering NES Average.

Get the most out of Ad Lengths

 Opt for either a short, product-focused ad that is 15 seconds or less in length, or a longer-form, storytelling ad that is 60 to 96 seconds in length. Ads in the 30-second range were average in terms of overall performance. Although lengthier short-film style ads have the potential to reach high levels of connection and encoding, this is also a high risk format in which to invest due to greater production and media costs.



Screenshot: Olay, “Have you heard about...”



Screenshot: Interac, “Pillow” :15

Campaign Type: Multi-video campaigns

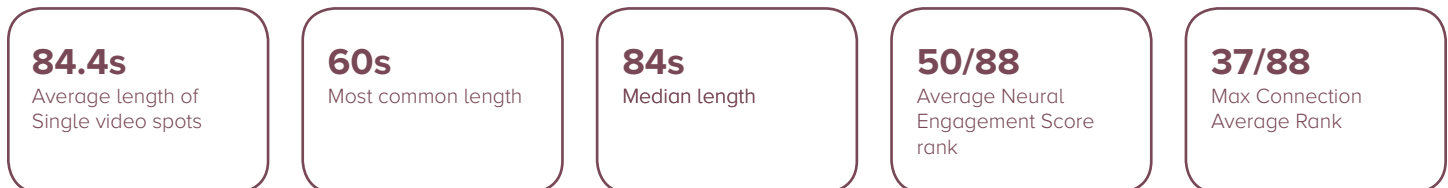
Multi-video campaigns used a variety of generally shorter-form video to tell the advertiser's message across multiple spots.



M&S, WestJet, Walmart and Canadian Tire use multi-video campaigns that include longer-form videos (60s+). M&S, Walmart and WestJet enjoy some success with this tactic.

Campaign Type: Single video advertisements

Single video advertisements, on the other hand, are typically longer-form spots wherein an entire brand story is told.



Get the most out of your Media Formats



Success can be found in both tactics—as can failure. Choices in ad length and campaign type will depend on risk appetite, the ability to tell stories that leverage the themes, styles and music proven to work, and media budget size (shorter assets will almost always rely on greater exposure frequency, which could mean higher costs). With multi-video campaigns, risk is being spread across a number of (typically) shorter-form assets. However, longer-form ads are more likely to make deeper impressions (stronger individual moments of Neural Engagement—Attention, Connection and Encoding).

Conclusion and Key Actions

When reflecting on the findings of this Report, there is a useful sports analogy that helps explain the best approaches in producing effective holiday advertisements. In baseball, there have traditionally been two popular ways for teams to play—long ball, and small ball. Long ball relies on strength—home run hitters that electrify crowds with power, but who in swinging for the fences also (often) swing and miss. Small ball plays the percentages, hitting for average and manufacturing runs through speed and effective ball placement. Small ballers tend to hit for better, higher averages, but can also be quite scrappy and less classically attractive in their play.

In many ways, we're seeing small ball and long ball play out in holiday advertising. The 'small ballers' are multi-video, short-form ad campaigns. They may not be the most attractive in their ads, but they're hitting higher averages and generating results together.

Single video, longer-form ads are the 'long ballers'. These ads are hitting for power, seeking not consistency or scrappiness, but big moments of game-changing drama. Long-ballers can make for great entertainment; they also more often strike out.

There's a third way that's also possible. It's a more complete approach, which involves improving both the consistency and power of holiday advertising.

It can be achieved by using the right combination of themes, music and styles that are proven to connect deeply with people during the holidays, and executing through formats that make sense—whether that's through a short film, or through a multi-video campaign, or both.

This complete approach will improve advertisers' chances of capturing as much of that \$11B opportunity as possible, ensuring their holiday investment risk is mitigated, while building deeper connections with Canadian holiday shoppers.

Appendix 1: Methodology

Data Collection | Data Processing | Data Analysis

Data Collection

Timing: Data was collected from October 30th to December 14th 2018

Media: Content was viewed on either TV, Mobile or Laptop screens.

Audiences: Multiple general population audiences viewed a variety of holiday content within broader reels of video content, simulating the typical content consumption of adults in Canada.

Ads: 88 ads originating from 6 different countries (Canada, US, UK, France, UAE, Singapore) were selected based on their explicit holiday-related themes and focus.

While some ads feature advertisers with no presence in Canada (John Lewis, Bouygues, etc), understanding the unconscious response of Canadians to out-of-market ads provides much more robust insights and inspiration to Canadian advertisers in telling unique holiday stories. Ads were sourced through publicly available Youtube links.

Each ad was screened for a group of between 30 and 300 people, each of whom had their non-conscious brain wave activity recorded using electroencephalography. A sample size of 30 is the standard power score for EEG, which means that to get a statistically significant and confident read on an audience's response, 30 people is the magic number.

Brain Data: Brainsights' audience measurement platform collects more 4000 data points per second, per person, using electroencephalography. More than 1,000,000,000 data points were collected and analyzed for this analysis.

Data Processing

Ads: Ads were tagged by theme, sub-theme, style, tone, music and ad length, analyzed both by grouping and individually for insights. Several ads were tagged with multiple themes, and so have been included in multiple groupings.

Audience Brain Data: Data was normalized by participant, and aggregated across all participants to evaluate ad and content performance, both by individual ad and across key themes and other meta-data categories.

Data Analysis

Brainsights consultants analyzed 88 advertisements from multiple industries, including CPG, Retail, Grocery, Travel, Charity, QSR, Lottery, and Consumer Technologies.

Our metrics are as follows:

Neural Engagement

Attention

Connection

Encoding

Neural Engagement is a composite score of aggregated consumer Attention, Connection and Encoding scores.

Attention answers: is an audience tuned in or tuned out to what they are viewing?

Connection answers: is an audience emotionally engaged in what they are consuming. Is it resonating with them at a deeper level?

Encoding answers: is an audience going to remember the key moments and messages?

The metrics are derived from brainwave analysis. Brainsights' audience brain measurement system takes a reading of brain waves of people every 2 milliseconds, syncing at the millisecond level with the content viewed at that instant.

Benchmarks

In calculating benchmarks, Brainsights used an overall holiday ad benchmark, so wherever you see +/- % NES/Max, we are referring to that ad's scores versus this benchmark. We use this benchmark for two reasons: 1) The ads we are analyzing appear in various lengths and from various industries. 2) Advertisers are not simply competing against those in their category; they are competing for the hearts and minds of consumers versus everything vying for consumer attention.

Appendix 2: Ad Breakdown

Advertisement	Origin	Sampled In
#PPLAdvert, “December’s Extra Prizes - December Play - People’s Postcode Lottery”	UK	Toronto
23andMe, “The Gift For Everyone You Love”	US	Toronto
23andMe, “Discover The Grinch’s DNA Story”	US	Toronto
Air Transat, “The Cure for Homesickness”	CA	Montreal
Aldi, “Kevin the Carrot Christmas Cliff Hanger Advert”	UK	Toronto
Amazon, Holidays 2018 “Can You Feel It”	UK	Toronto
Apple, Holiday “Share Your Gifts”	US	Toronto
Argos, “The Christmas Fool”	UK	Toronto
Asda, “Bring Christmas Home”	UK	Toronto
Barbour, “The Snowman”	UK	Toronto
Boots, “#GiftsThatGetThem”	UK	Toronto
Bouygues, “Come and Get Your Love”	FR	Toronto/Montreal
Cadbury, “Secret Santa”	UK	Toronto
Canada Goose, “Generations of Warmth”	CA	Montreal
Canadian Tire, “Big Help”	CA	Toronto
Canadian Tire, “Ghosts of Christmas Presents”	CA	Toronto
Canadian Tire, “Magic”	CA	Toronto
Cineworld, “Practically Perfect Gift”	UK	Toronto
Currys PC World, “The Magic of Christmas Upgraded”	UK	Toronto
Emirates Airline, “Let’s celebrate the festival of lights together Diwali 2018”	UAE	Toronto
Emirates NBD, “Give In To Giving”	UAE	Toronto
Emirates Airlines, “Emirates spreads Diwali joy in Dubai”	UAE	Toronto
Fortnum & Mason, “Masters of Merry”	UK	Toronto
GovSingapore - Kungfu Fighter, Hidden Sugar	Singapore	Toronto
Guide Dogs UK, “Sponsor a Guide Dog”	UK	Toronto
Heathrow, “The Heathrow Bears Return”	UK	Toronto
Iceland Foods, “Say hello to Rang-tan”	UK	Toronto
IGA, “#laCollationduPèreNoël”	CA	Montreal
IKEA, “Magic Man”	CA	Toronto

Interac, Holiday “Pillow” :15	CA	Toronto
Interac, Holiday “Pillow” :30	CA	Toronto
JD Williams, Christmas Advert 2018	UK	Toronto
Joe Fresh, “Jessi Cruickshank Shops Holiday at Joe Fresh”	CA	Toronto
John Lewis & Partners, “#EltonJohnLewis”	UK	Toronto/Montreal
KFC UK Christmas Advert 2018	UK	Toronto
LCL, “Holiday Song” (Audio)	CA	Toronto
LCL, “Candy”	CA	Toronto
LEGO, “This is not a Brick. It’s their wildest wishes”	US	Montreal
M&S, “Must Haves”	UK	Toronto
M&S, “Discover Your M&S Christmas Favourite”	UK	Toronto
Nordstrom, “True Nord”	CA	Toronto
Nordstrom, “Let’s Go Gifting”	CA	Toronto
Olay, “PureWow x Olay present the Holiday Musical: Have you heard about...?”	US	Montreal
President’s Choice, “Cats out of the box”	CA	Toronto
President’s Choice, “Grandma’s got some dance moves”	CA	Toronto
President’s Choice, “No present can top this”	CA	Toronto
President’s Choice, “Not all toys work out” :15	CA	Toronto
President’s Choice, “Not all toys work out” :30	CA	Toronto
President’s Choice, “Santa’s got a new ride”	CA	Toronto
President’s Choice, “When kids get in the spirit”	CA	Toronto
Sainsbury, “The Big Night”	UK	Toronto/Montreal
Shopper’s Drug Mart - Pharmaprix, “Holiday Motivational Speech Version 1”	CA	Montreal
Shopper’s Drug Mart - Pharmaprix, “Holiday Motivational Speech Version 2”	CA	Montreal
Shoppers Drug Mart, “Appy Hour”	CA	Toronto
Shoppers Drug Mart, “Beauty Holiday”	CA	Toronto
Shoppers Drug Mart, “Holiday Motivational Speech”	CA	Toronto
Shoppers Drug Mart, “Mom’s Holiday Wishlist”	CA	Toronto
Shoppers Drug Mart, “The Perfect Card”	CA	Toronto
Simply Be Christmas Ad 2018	UK	Toronto
Starbucks, “It’s back... Starbucks Red Cup”	CA	Toronto
Starbucks Holiday 2018, “Caramel Brulee Latte”	CA	Toronto
Starbucks Holiday 2018, “Peppermint Mocha”	CA	Toronto
Tesco, “However You Do Christmas”	UK	Toronto
TJ Maxx, “Dating”	US	Toronto
TJ Maxx, “Followers”	US	Toronto

TJ Maxx, “Last Minute”	US	Toronto
TJ Maxx, “Secret Santa Pick”	US	Toronto
TJ Maxx, “Something for Every You at TJ Maxx”	US	Toronto
TJ Maxx, “Something for Every You at TJ Maxx” :15	US	Toronto
TJ Maxx, “Something for Every You at TJ Maxx” :15 Version 2	US	Toronto
TJ Maxx, “Toys”	US	Toronto
TJX, “Holiday People List”	US	Toronto
TJX, “OfflineShopping” (en)	CA	Toronto
TJX, “OfflineShopping” (fr)	CA	Montreal
TJX, “OfflineShopping - Cashmere” (en)	CA	Toronto
TJX, “OfflineShopping - Cashmere” (fr)	CA	Montreal
TJX, “OfflineShopping - Headphones” (en)	CA	Toronto
TJX, “OfflineShopping - Headphones” (fr)	CA	Montreal
TJX, “OfflineShopping - Jewellery” (en)	CA	Toronto
TJX, “OfflineShopping - Jewellery” (fr)	CA	Montreal
TK Maxx, “The Neverending Stocking”	UK	Toronto
Waitrose & Partners, “Concert”	UK	Toronto
Waitrose & Partners, “Mistletoe”	UK	Toronto
Walmart Canada, “Bring Holiday Magic Home”	CA	Toronto
Walmart Canada, “Walmart Toy Academy”	CA	Toronto
WestJet, “Christmas Miracle: Uniting Through Traditions”	CA	Toronto
WestJet, “Christmas Miracle: Uniting Through Traditions - Sneak peek Day 1”	CA	Toronto
WestJet, “Christmas Miracle: Uniting Through Traditions - Haiti Day 3”	CA	Toronto

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Analysis is based on historical data from 2018. Market, consumer and competitive conditions change. We are at this time unable to predict all of these changes. We’re trying. But use this data and insight responsibly.



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