

Marketing Agenda August 21st-2025



August 2025

AudienceProject 



Global
HD





Kampagnen

Our data is used across the advertising process



- **Planning-** Understand platforms better
- **Buying-** monitor campaigns while they're running, not just retrospectively
- **Evaluation-** Was the plan achieved, how did it vary, what to do next time
- **Insight-** Build a picture across your digital activity
- **Better decisions from better information**

Setting the scene-

Lineær TV det største bidrag til Profit ROI* for de fleste kategorier

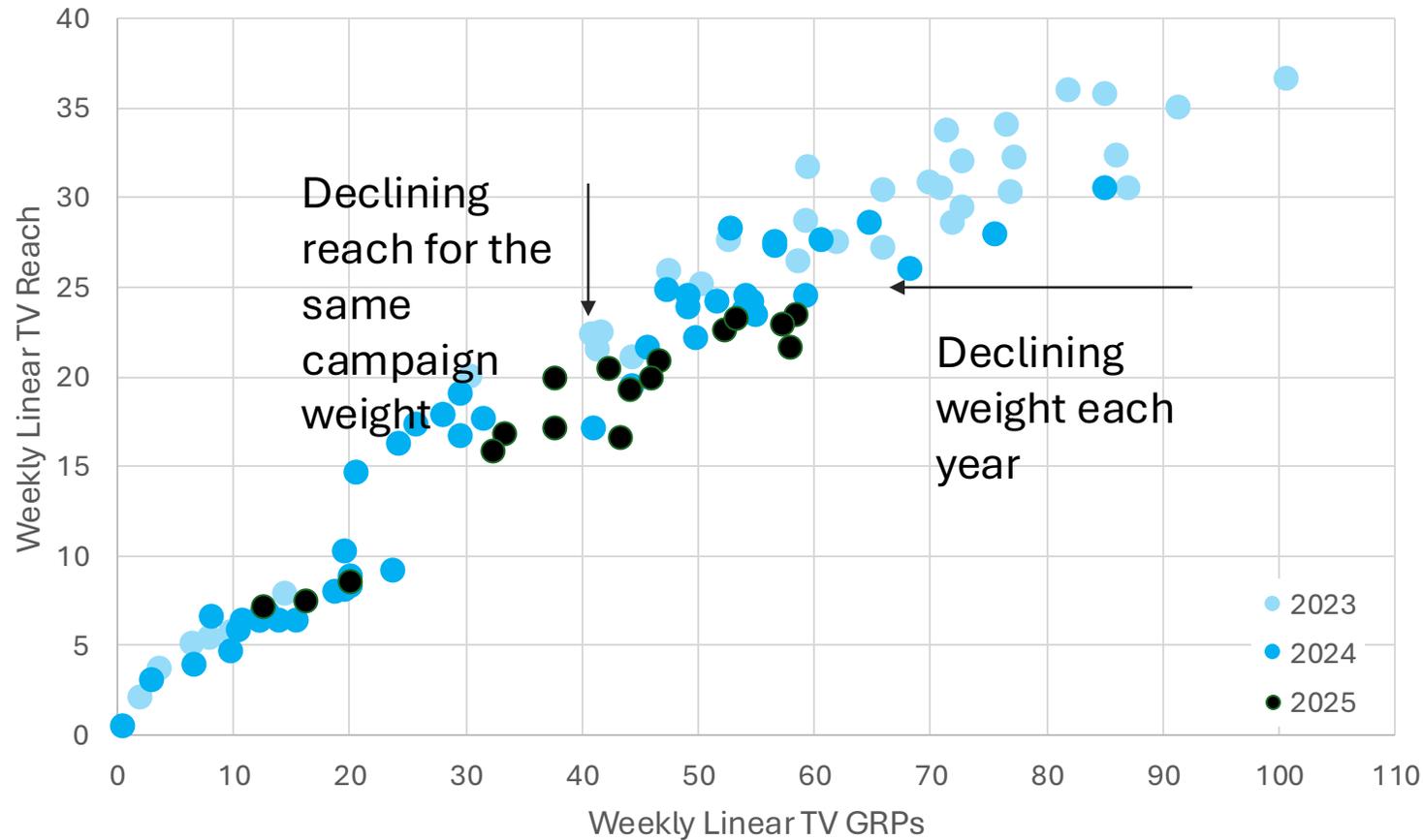
MEN

Audiences ser mindre TV, brands skal finde lost exposure andre steder

*<https://www.thinkbox.tv/research/thinkbox-research/profit-ability-2-the-new-business-case-for-advertising>

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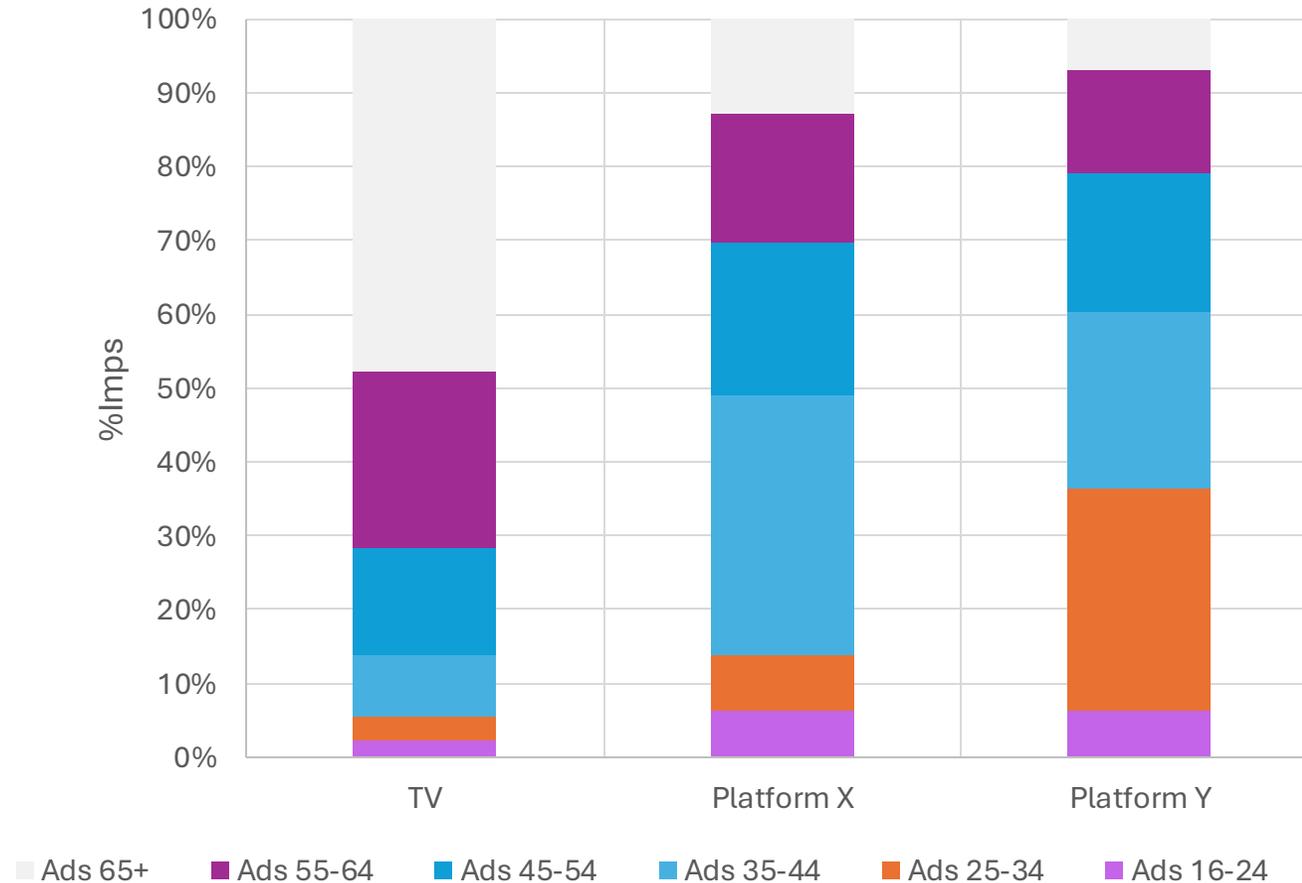
The declining weight and reach of linear campaigns



- The decline of viewing to linear TV is well documented
- Here we see the change in weekly weight (X) and reach (Y) against our client's core target audience
- There is a clear drop in reach for similar levels of reach over time, coupled with market inflation which makes the higher weights uneconomically expensive to buy
- The advertiser needs to find cost effective incremental reach that also generates business return

Forstå hvilke audiences der ser hvad og hvor

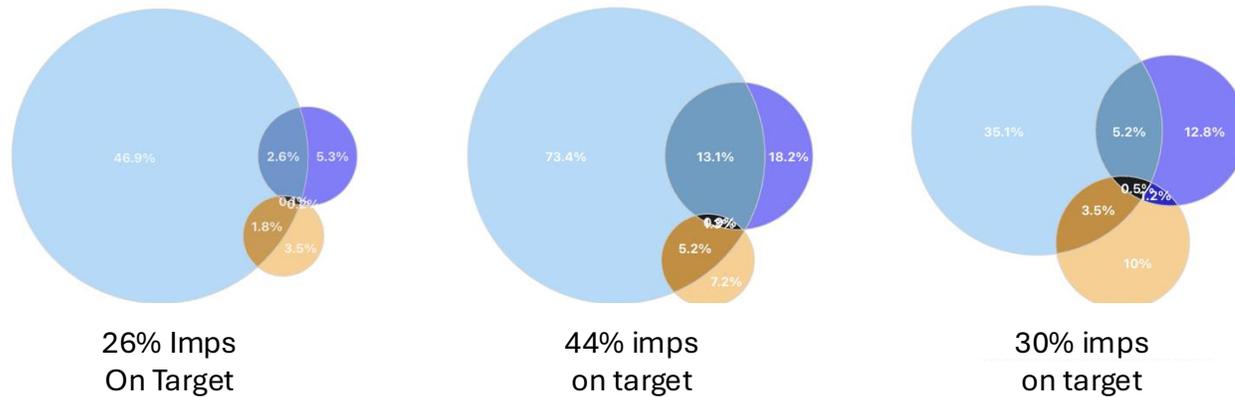
Digital platforms offer very different audience profiles compared to TV, and different strengths within



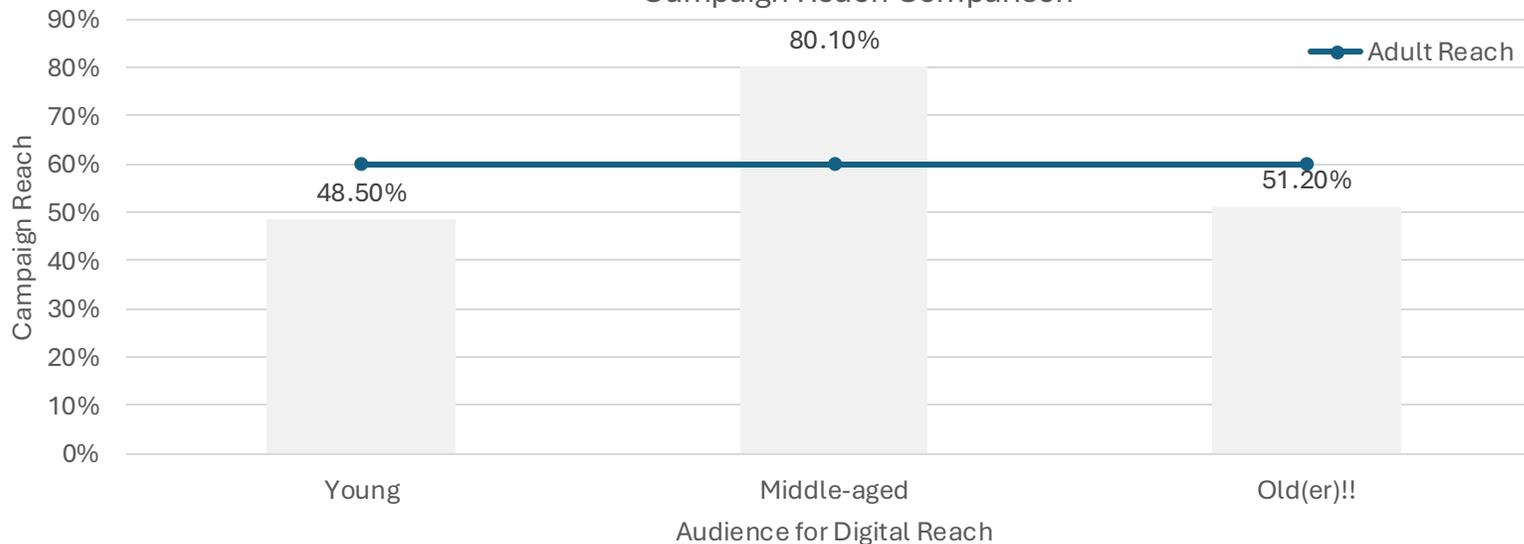
- Digital and TV audiences are very **complementary**
- Our clients get insight across their digital investment- **turn impressions into audience understanding**
- **Cost, reach and targeting efficiencies** all become clear

Forstå hvordan kampagner blev set på tværs af alders grupper, platform overlap, og kampagne effieciency for targeting af forskellige aldersgrupper

Within broad target audiences, viewing behaviour will be very different- Adults is a very blunt measure



Campaign Reach Comparison

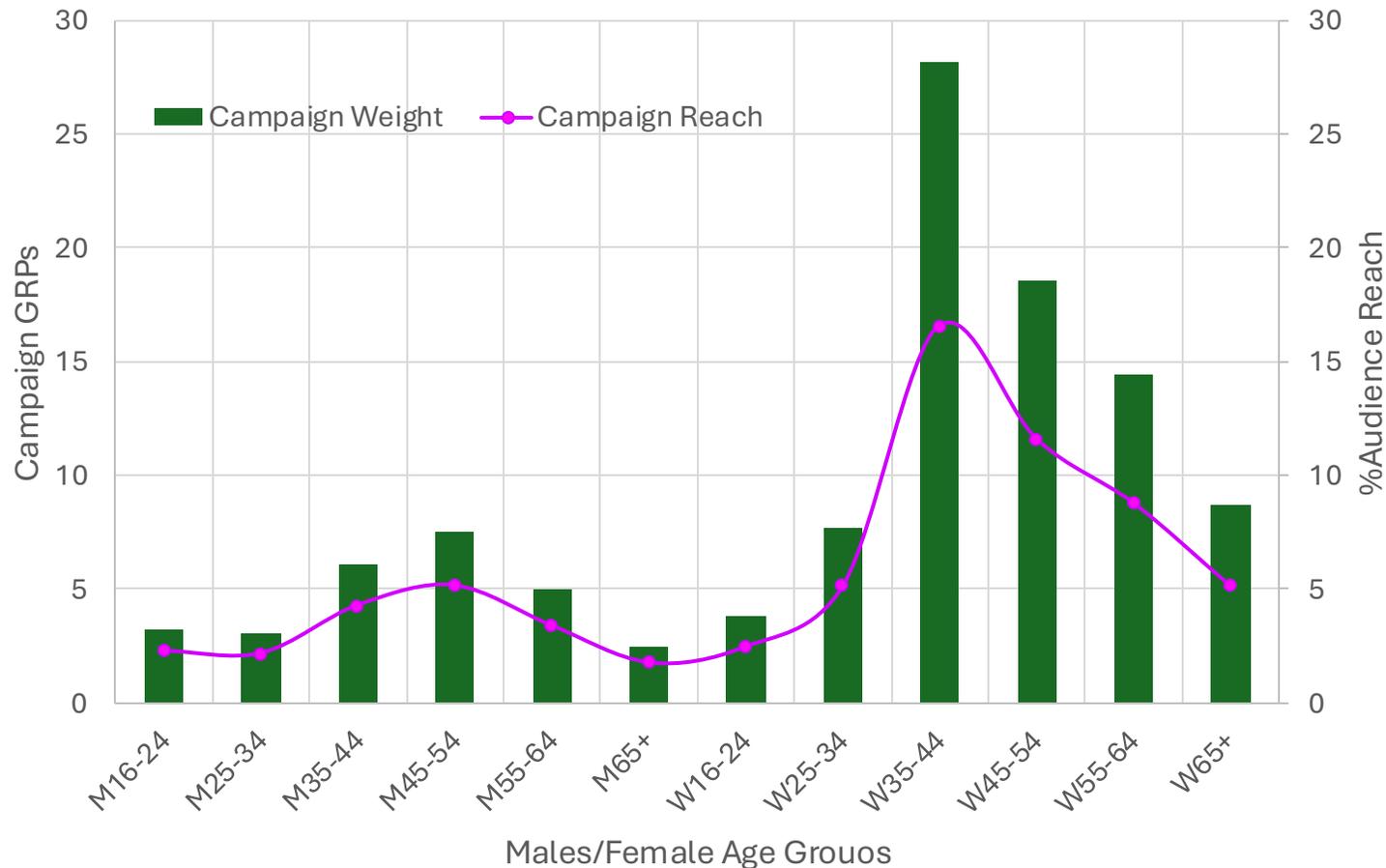


- This client has a **broad target audience**, but understands there will be **differences within** that (a **25** year old and a **50** year old consume media **very differently**)
- **Overlap** in reach between key digital platforms
- **Targeting efficiencies** and reach comparison helped deliver more **insight** and direction for **future** campaigns

**Vi ved digitale platforme er gode til at nå
audiences der ikke ser meget TV**

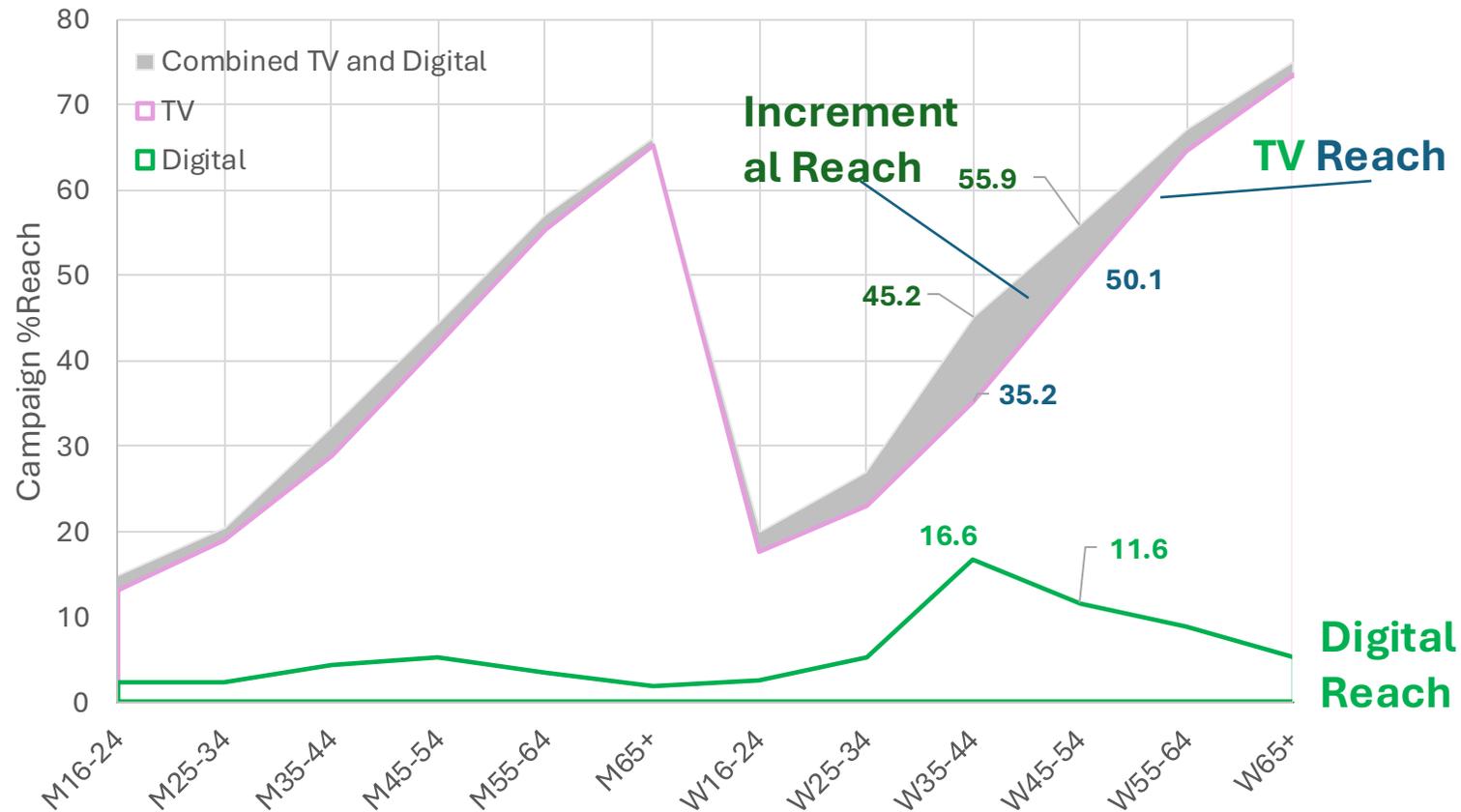
**Og at de kan give kampagnerne et godt
løft i reach/exposure**

Digital reach across all audiences for a campaign



- We help our clients see who has been reached by digital campaigns- either for **individual platforms**, or **combined and deduped**
- See who was reached in the **target audience**, as well as **outside that group**
- **As viewing fragments**, our measurement brings the pieces back together

Total campaign exposure- TV + Digital

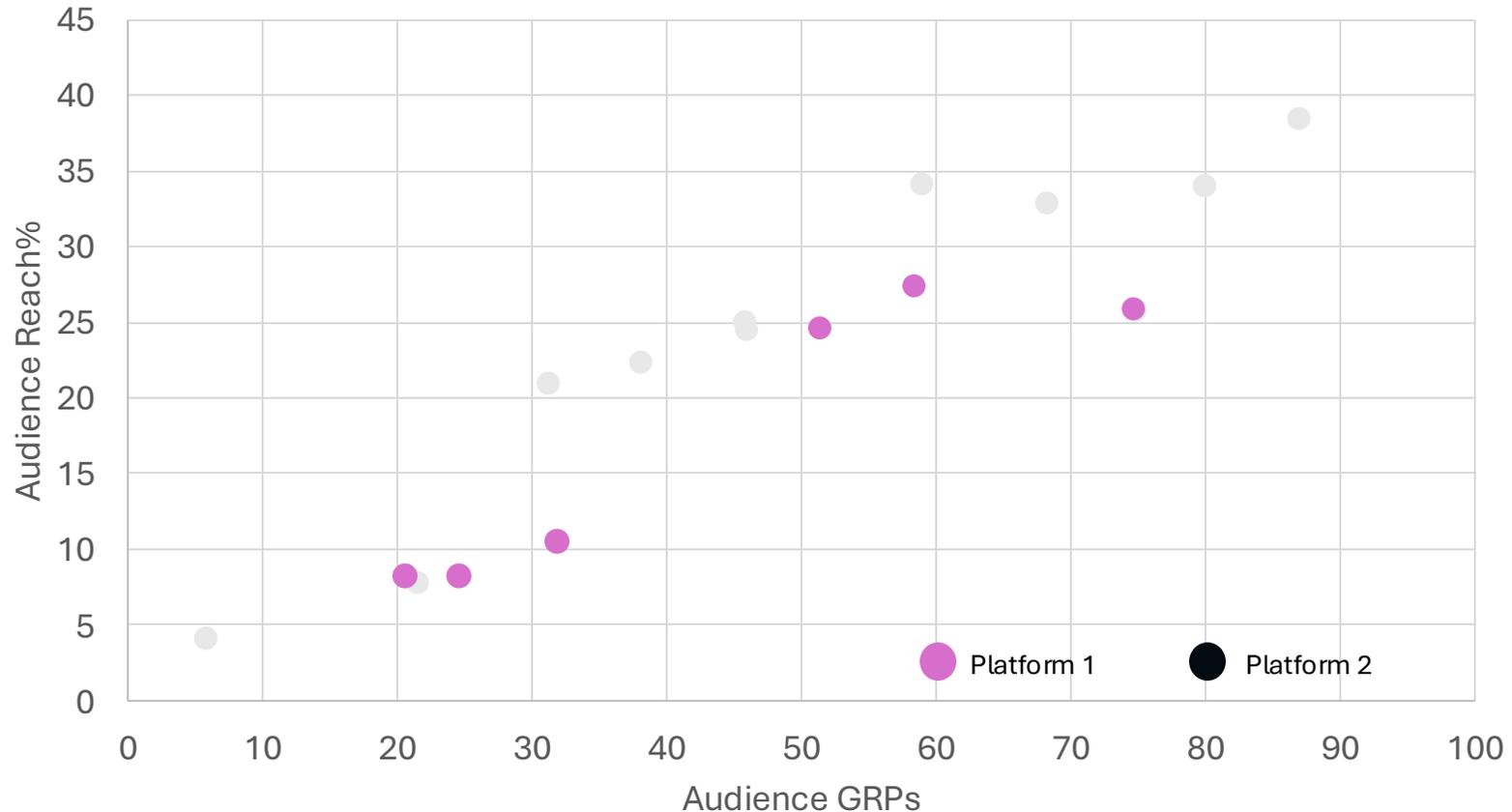


- Even relatively low levels of **digital** weight **can add significant reach** to linear TV campaigns
- Viewing is **fragmented**, digital and linear platforms are **complementary**, not competitive
- Digital effects are **magnified** because **audience targeting** is more **precise** than linear

Forstå reach potentialet af digitale platforme

Our data shows how each platforms delivers reach against specific demographics, irrespective of trading audience

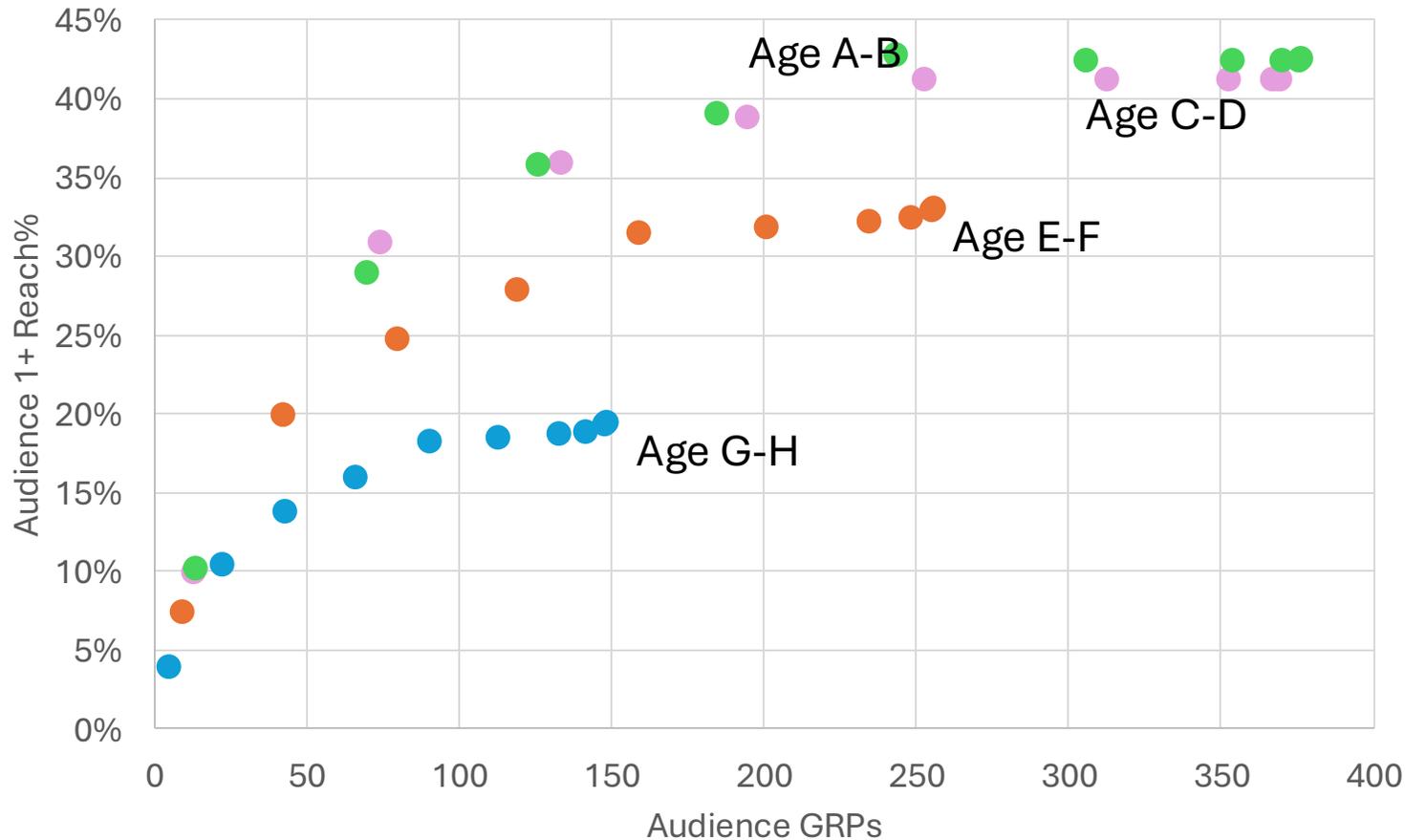
Multi-platform Reach Efficiency



- This client uses our data to build a picture of digital platform reach efficiency
- Platform 2 consistently delivers **better reach at comparative weight** of campaign than Platform 1
- Q&A- how **much can be invested** in Platform 2 before inefficiencies occur? Explore with the agency which **trading options** for Platform 1 reduce OTS and **grow reach**

Develop reach curves for audiences, better understand channel potential, improve budgeting and MMM models

Campaign reach efficiency for a selection of ages

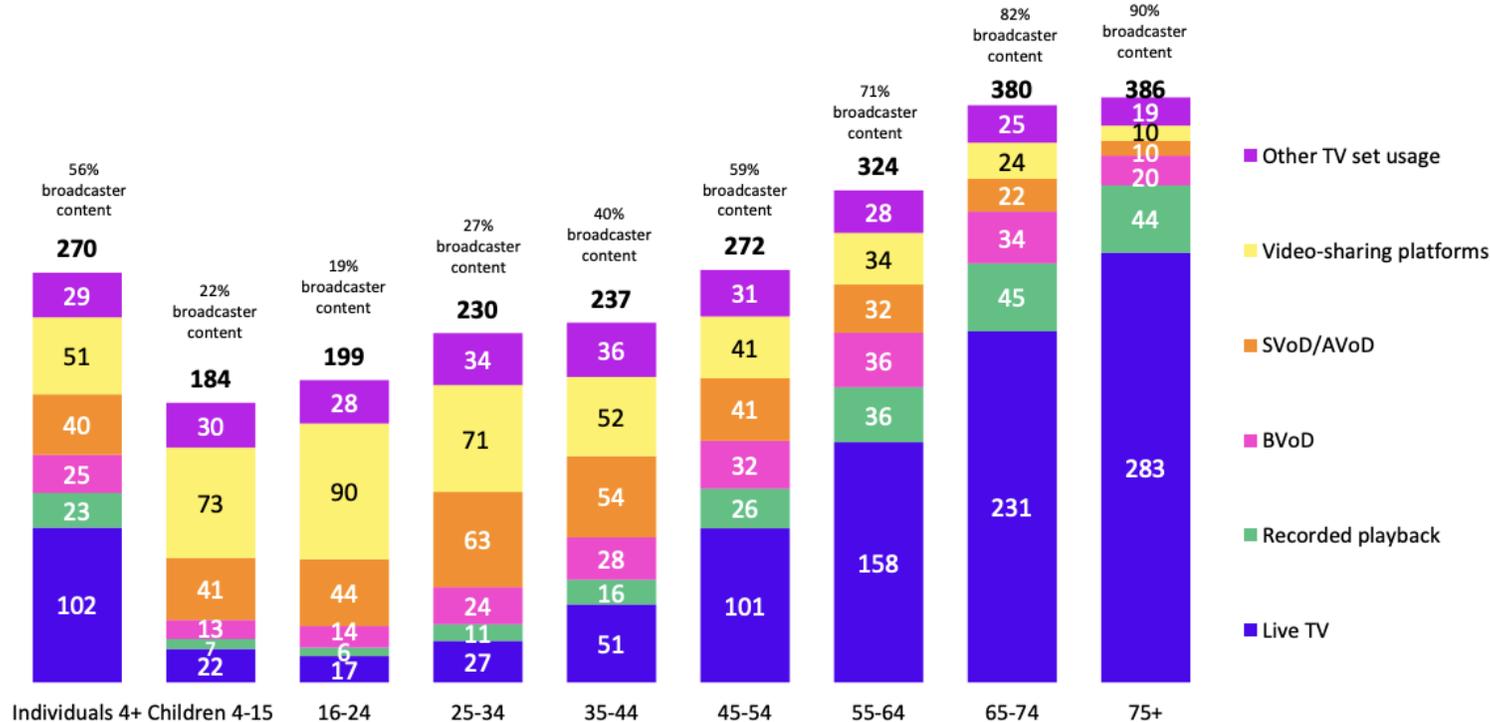


- Question- when does **reach saturation** occur on a platform and do **different audiences** show **different results**?
- In flight budget reallocation to growing channels
- **Six-figure** savings per month
- Enhanced insight for **MMM modelling**

TV Is Alive

The TV is now a device to access the content the viewer wants, when they want. The consumer does not differentiate.

Figure 11: Average daily minutes of in-home video viewing, by age: 2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. See notes from Figure 10 for detail about the categories.

*<https://www.nytimes.com/2025/07/12/business/media/youtube-netflix-streaming.html>

**<https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/multi-sector/media-nations/2025/media-nations-2025-uk-report.pdf?v=401287>

- On average, the UK viewer spend 4hrs 30 mins watching some form of content on the TV each day**
- In the US, YouTube (12.5%) and Netflix (7.5%) accounted for 20% of TV viewing time*
- 2 years ago, YouTube's lead over Netflix was 0.5%*
- In the UK**, time spent watching YouTube at home via TV grew from 34% to 41% in 2024 vs 2023

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The Barn at Arla



Who
are
you?



Katrine Buhl Vester



PURPOSE

Why is incremental reach important in FMCG?

...and how do you know if you succeeded?

Arla's global integrated in-house agency

- Founded in 2019
- Creative, media, production, and data & tech under same roof
- Working with +80 brands across 33 markets
- 150+ fulltime employees





CA

UK

NL

DK

DE

NO

SE

FI

MENA

AUS

The Barn is present in **10 Arla markets**

Creative studios in DK, SE, UK, DE, and MENA

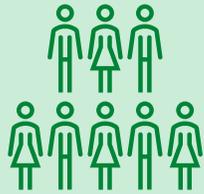


**150 best in class
colleagues**



Media Planning

How brands grow



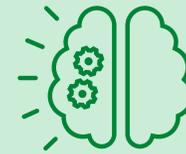
**MARKET TO THE
MASSES**



**EVOKE
EMOTIONS**



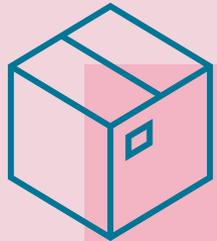
**BE
ALWAYS ON**



**BE
MEMORABLE**

Increased penetration foster brand growth

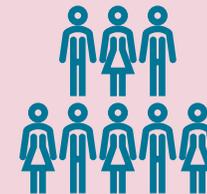
Get as many people as possible to buy your brand by making it available to the consumers



PHYSICAL AVAILABILITY



MENTAL AVAILABILITY



MARKET TO THE
MASSES

3 fundamental truths

Your brand is NOT unique

Your target audience is
NOT unique

Consumer are NOT loyal

Broad reach

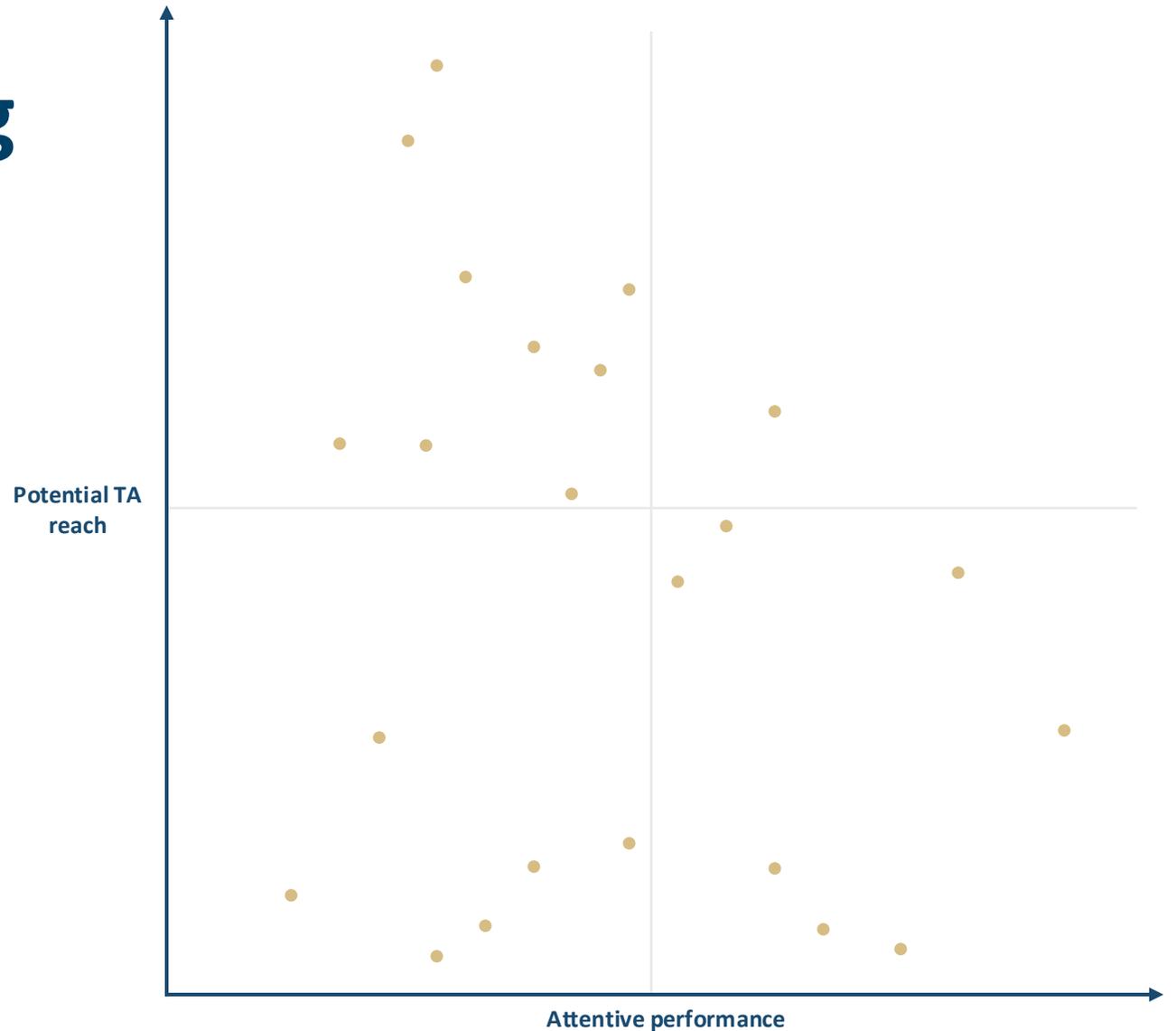


**High quality
High attention**

Effective media planning is **considering every media and format holistically**

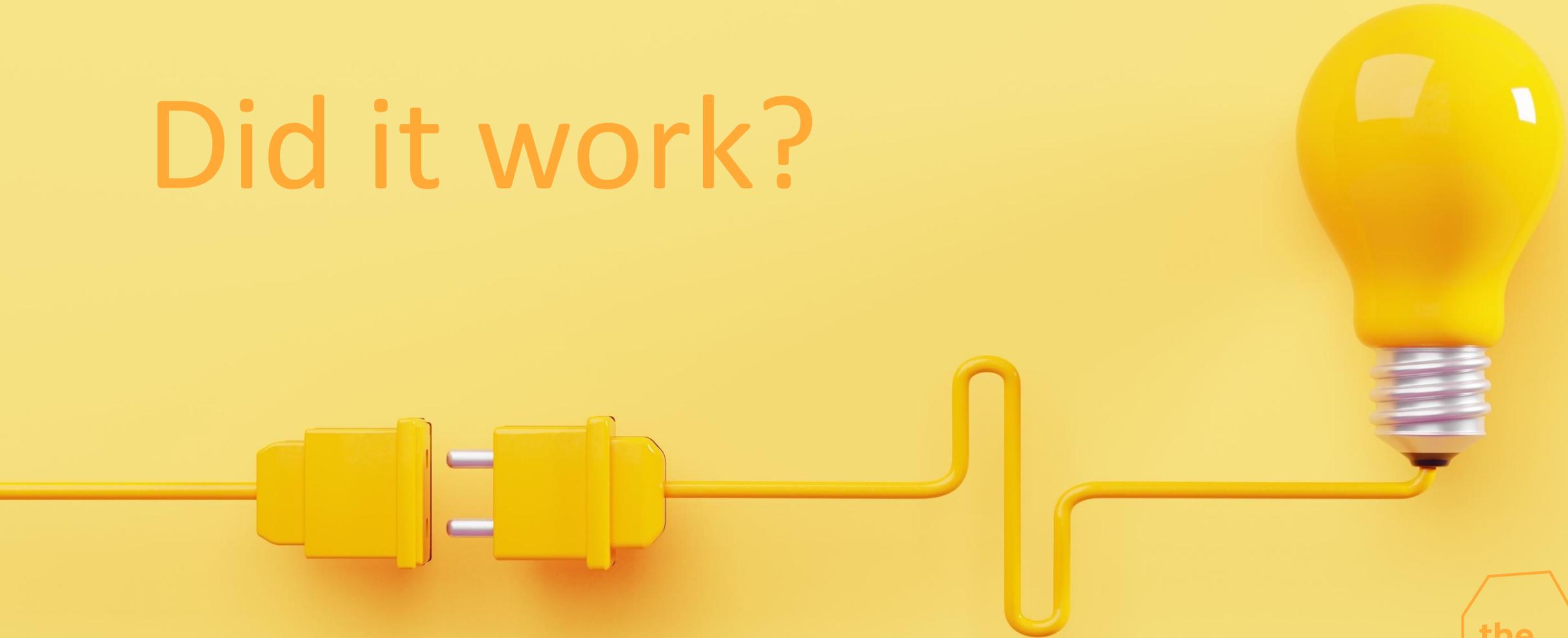
The digital planning framework outlines the strengths of every media channel and format.

The framework underlines that you want to find effectiveness in planning for the right media mix as no media channels and formats excels in both reach and attention.



Based on analysis of +10 billion impressions on Arla creatives served across +70 markets

Did it work?



Cross media evaluation

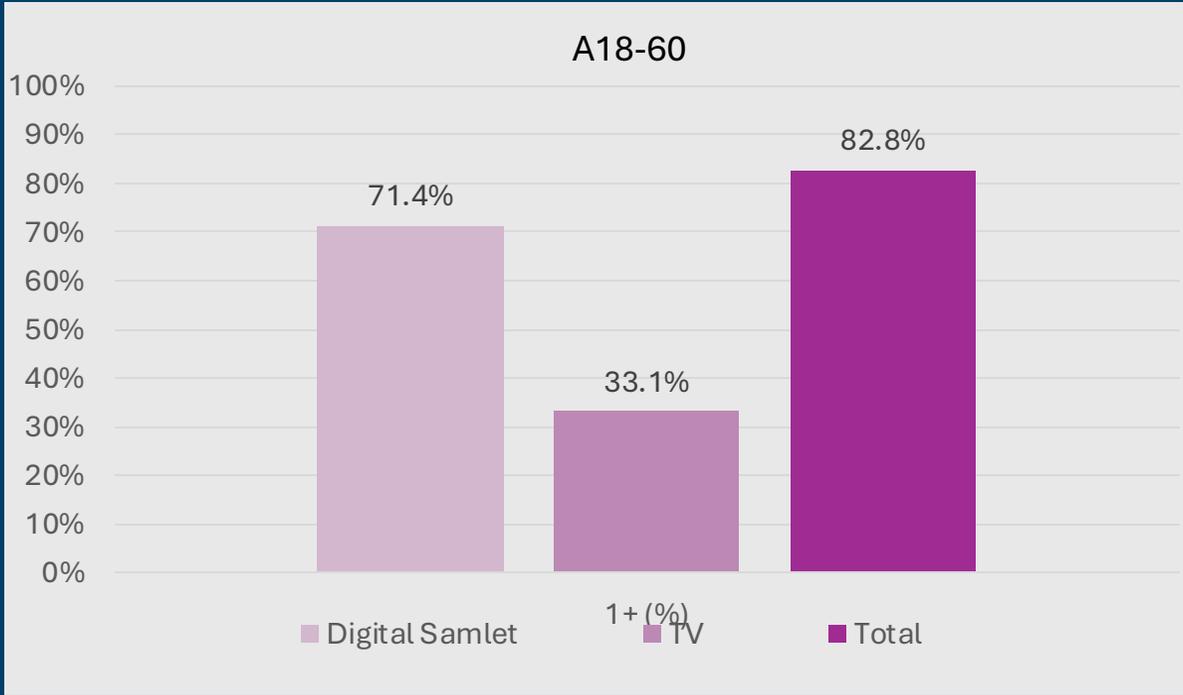
Who is my campaign reaching

How many is my campaign reaching

How often is my campaign reaching them

...and how does each channel contribute?







ON-TARGET PERCENTAGE (P) 

87.4%

How many of the people reached are in your target group?

REACH IN TG

74.1% /
2,390,664 people

How much of the target group population did you reach?

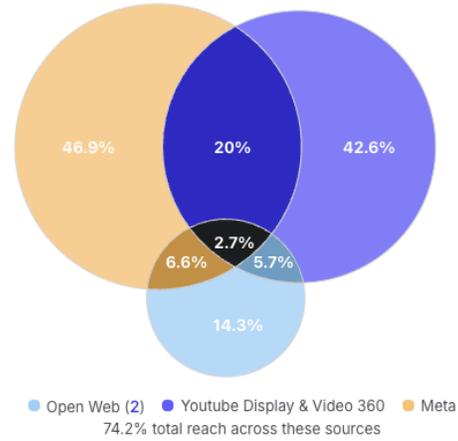
FREQUENCY 

7.8

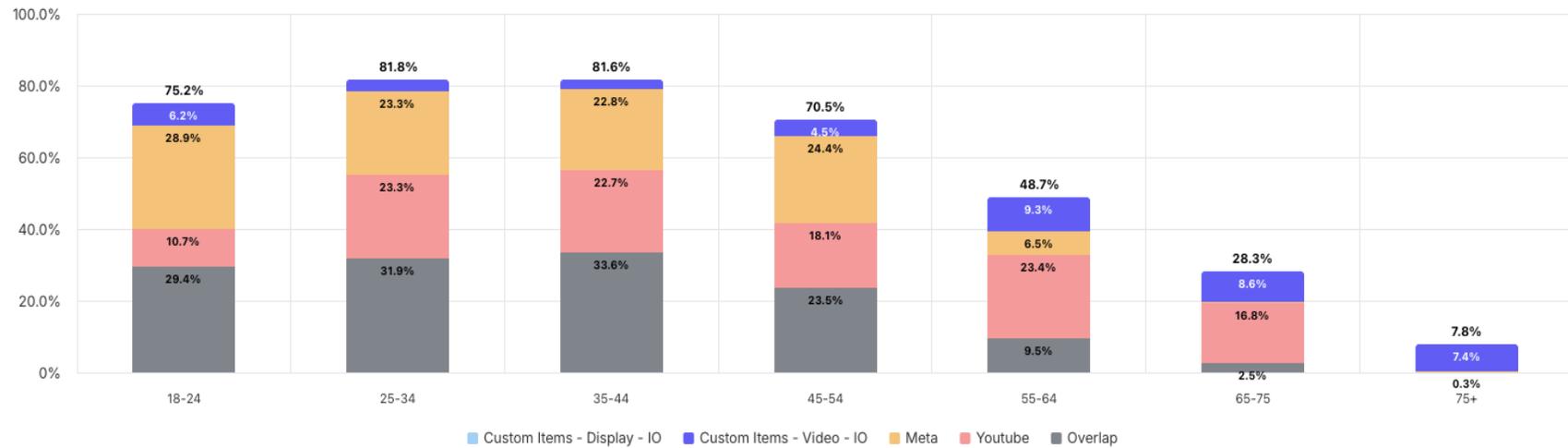
How many times on average is a person reached by your ads?



Reach in TG overlap (%) — 3 largest channels



Total and incremental reach (%) by age



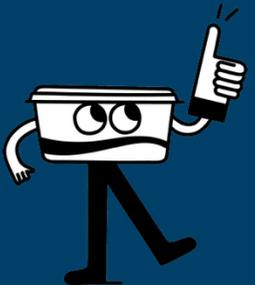
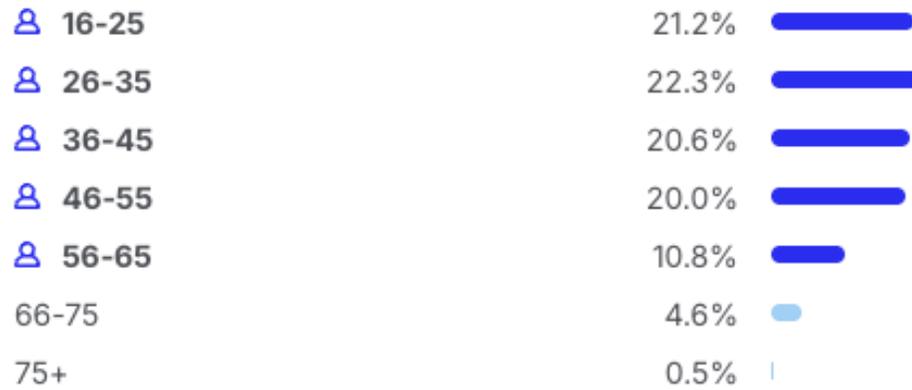
Distribution in segments

Which segments did you hit overall?

Gender



Age





Segments by channel
Which segments were hit by which channel?

Show as: **Distribution** ▾

Gender ▾

Channel ▾	Male ▾	Female ▾
Custom Items - Display - IO	0%	0%
Custom Items - Video - IO	47.0%	53.0%
Meta	53.1%	46.9%
Youtube	56.2%	43.8%

Age ▾

Channel ▾	16-25 ▾	26-35 ▾	36-45 ▾	46-55 ▾	56-65 ▾	66-75 ▾	75+ ▾
Custom Items - Display - IO	0%	0%	0%	0%	0%	0%	0%
Custom Items - Video - IO	25.5%	13.8%	12.7%	17.4%	18.3%	9.3%	3.0%
Meta	27.1%	23.4%	22.2%	22.7%	4.3%	0.2%	0.1%
Youtube	14.1%	24.6%	22.2%	18.4%	13.9%	6.8%	0%

What do we know now?

Who my campaign is reaching

How many my campaign is reaching

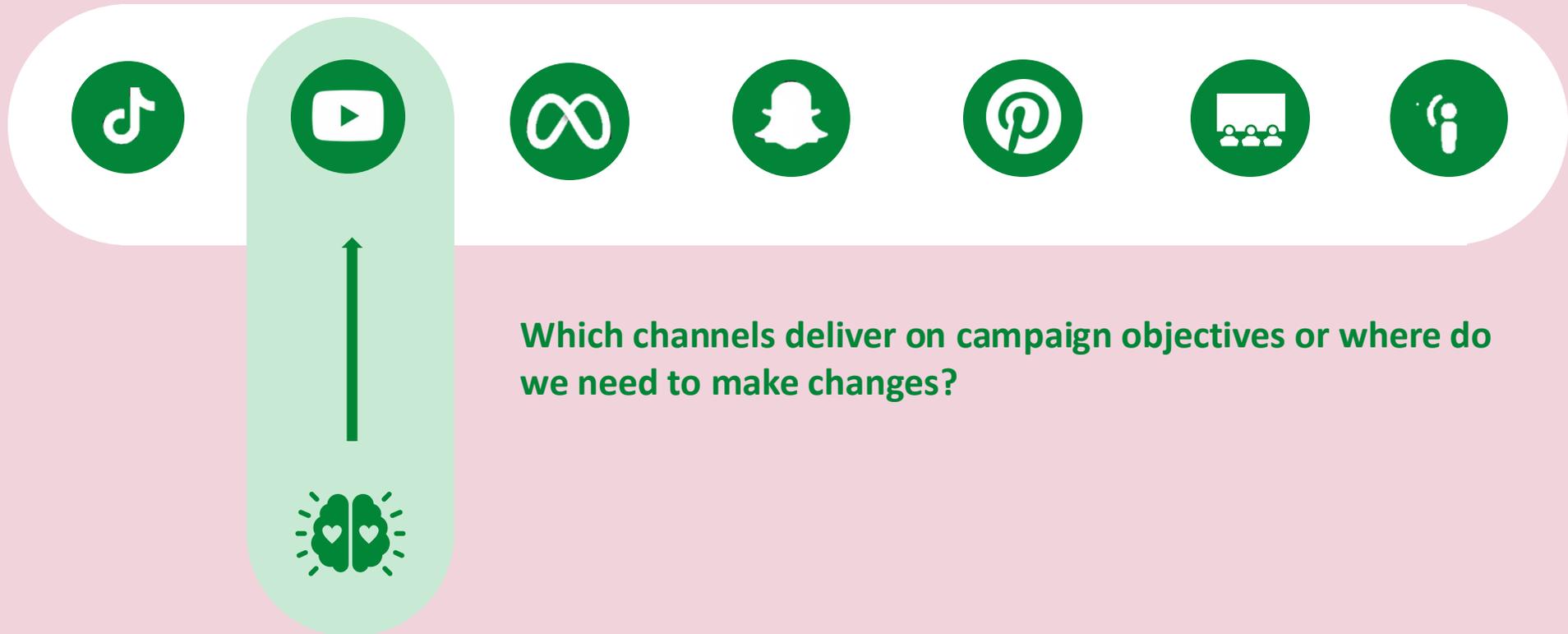
How often my campaign is reaching them



What can we do with the knowledge?

Prioritized channel mix

Based on campaign evaluation media planners will be able to make qualified decisions for media mix going forward



Thank you

