

The World Wide Web

**& Print
Media**

The World Wide Web

Algorithms

Over the last 10 years it is these algorithms that have been determining how advertising money is spent ...

Where Artificial Intelligence meets natural stupidity

The World Wide Web

Algorithms

Programmatic has turned ad. buying and selling into a 'commodity market' driven by a set of simplistic rules based on cpt and volume/repetition

2008 The World Wide Web 2021

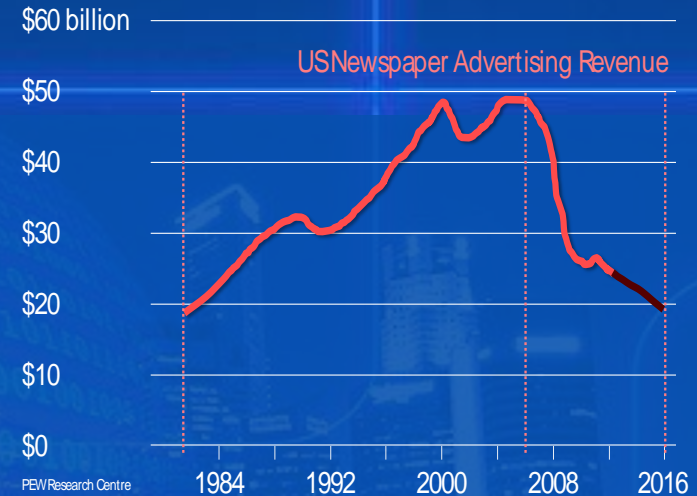
2018

\$266 Billion ad Revenue

< 10% → 42% → 50%

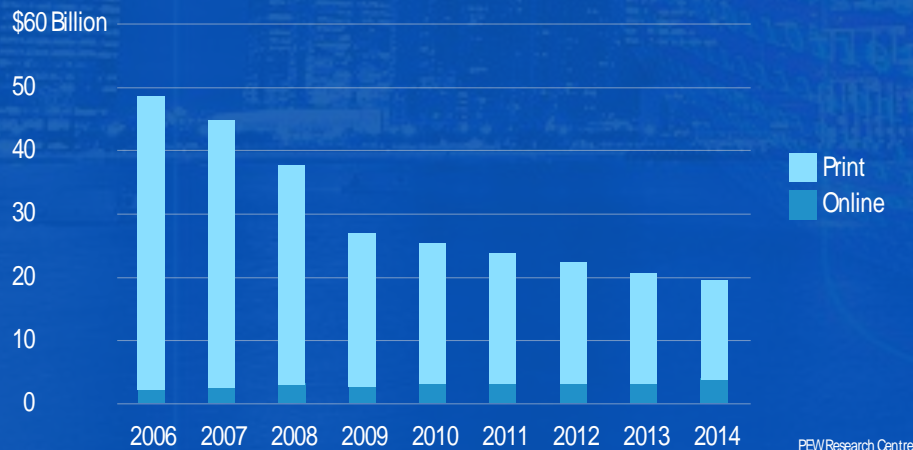
Now exceeds broadcast TV advertising

25 years of ad.sales growth lost in 10

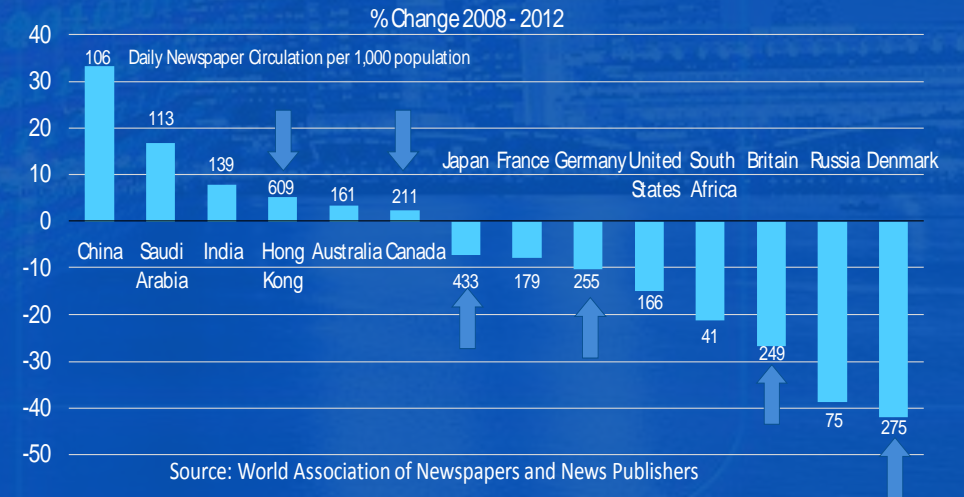


Low Yield Digital is far from Compensating this Revenue Loss

US Newspapers: Print and Online Ad Revenue

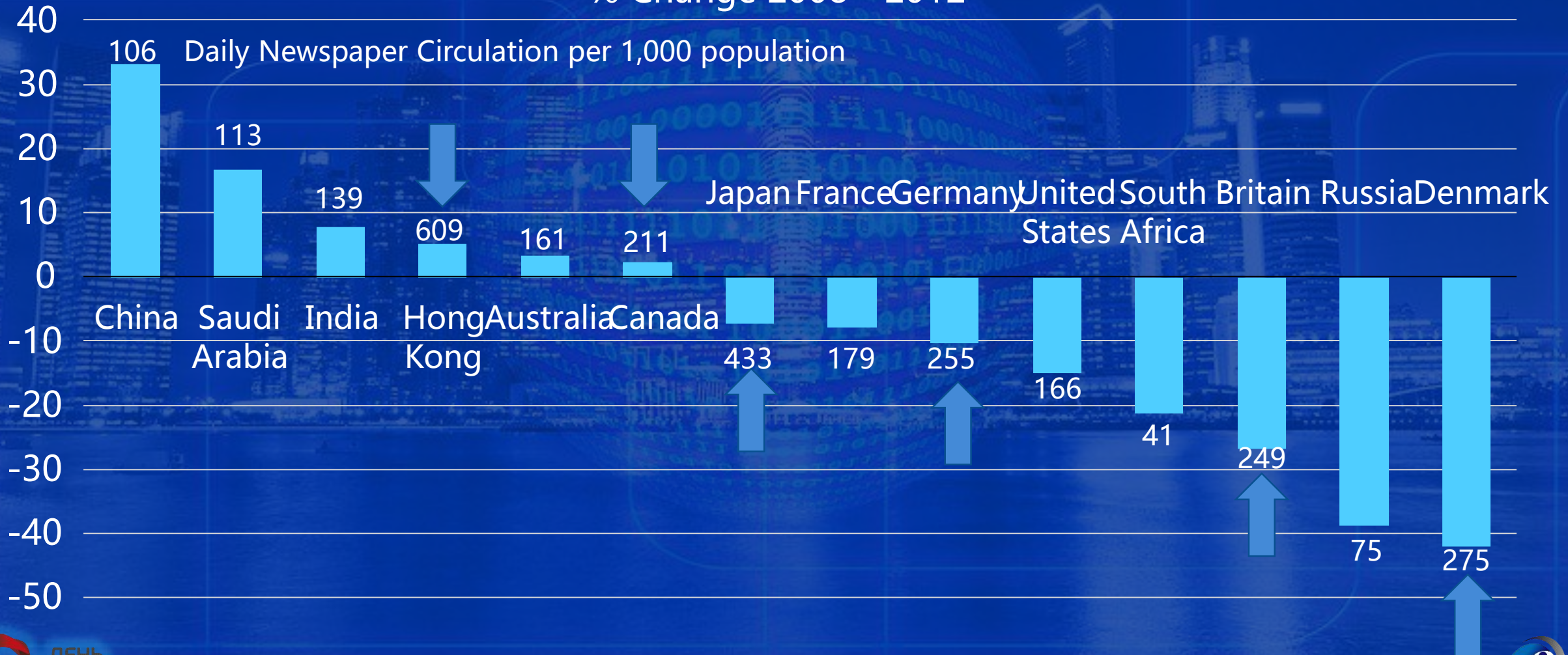


Daily Newspaper circulation



Daily Newspaper circulation

% Change 2008 - 2012



Source: World Association of Newspapers and News Publishers

Digital innovation has 2 sides

On the one side



The World Wide Web – a huge Ad. sales success

- Advertising '*scale*' from local to global
- Easy and cost efficient to buy
- Individual targeting capability, no Ad. spend waste
- Ad. exposures delivered, reported real time
- Wide creative opportunities
- ROI data (Return on Ad. Investments)

So who is getting the Ad. Revenue?

Net US Ad. Revenues
\$Billions

% Share
Est 2018

Index on
2016

Google/YouTube

42.7

104

Facebook/Instagram

23.0

133

MS/Linkedin/Oath/Amazon/Twitter

11.7

157

All Others

22.6

61

Source e-marketer Sept 2017

\$93.97B

Digital innovation has two sides

- On the other side

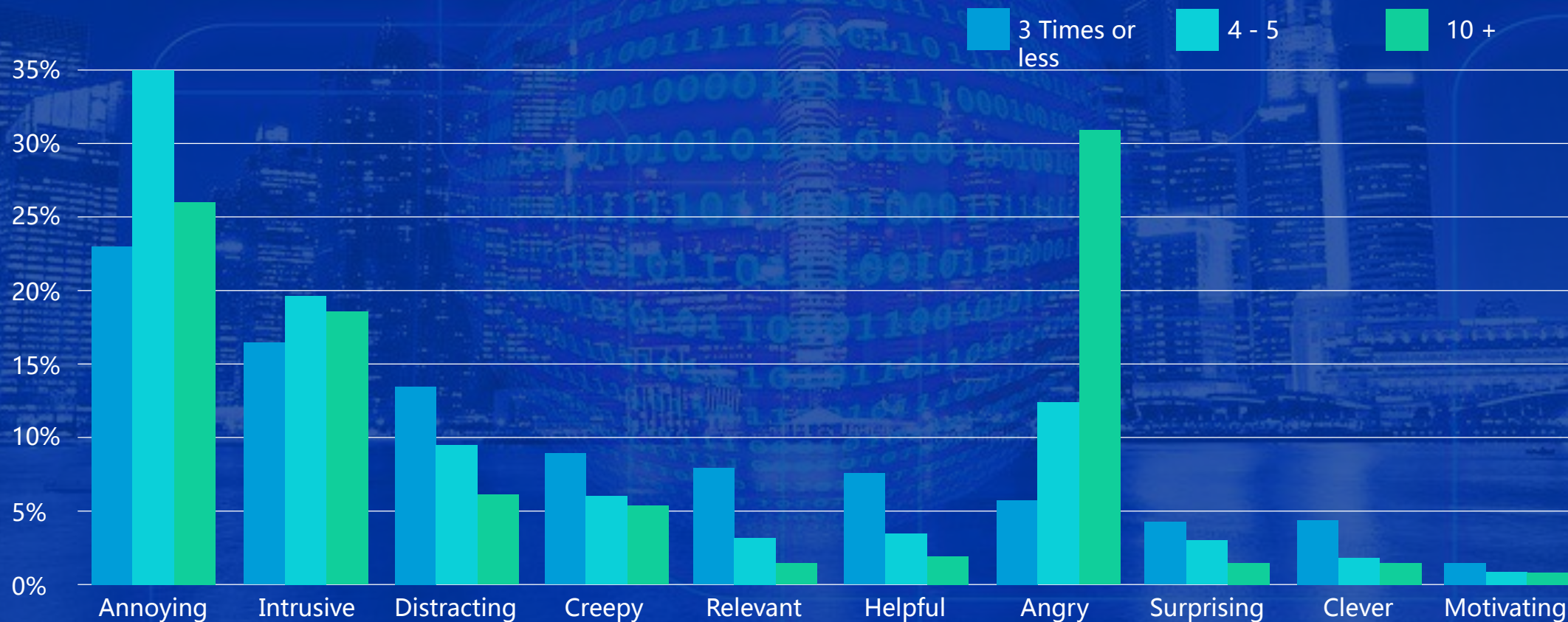


Is the love affair with digital beginning to cool?

- Dubious and non transparent audience numbers
- Fraudulent non-human traffic
- Viewability issues
- Frequency overkill
- Increasing use of Ad. blockers
- Ad. viewing only microseconds
- Hostile Brand environments
- Privacy legislation

Anger, annoyance – danger to Brand Values

- Demonstrating danger of excessive retargeting on Brand Values

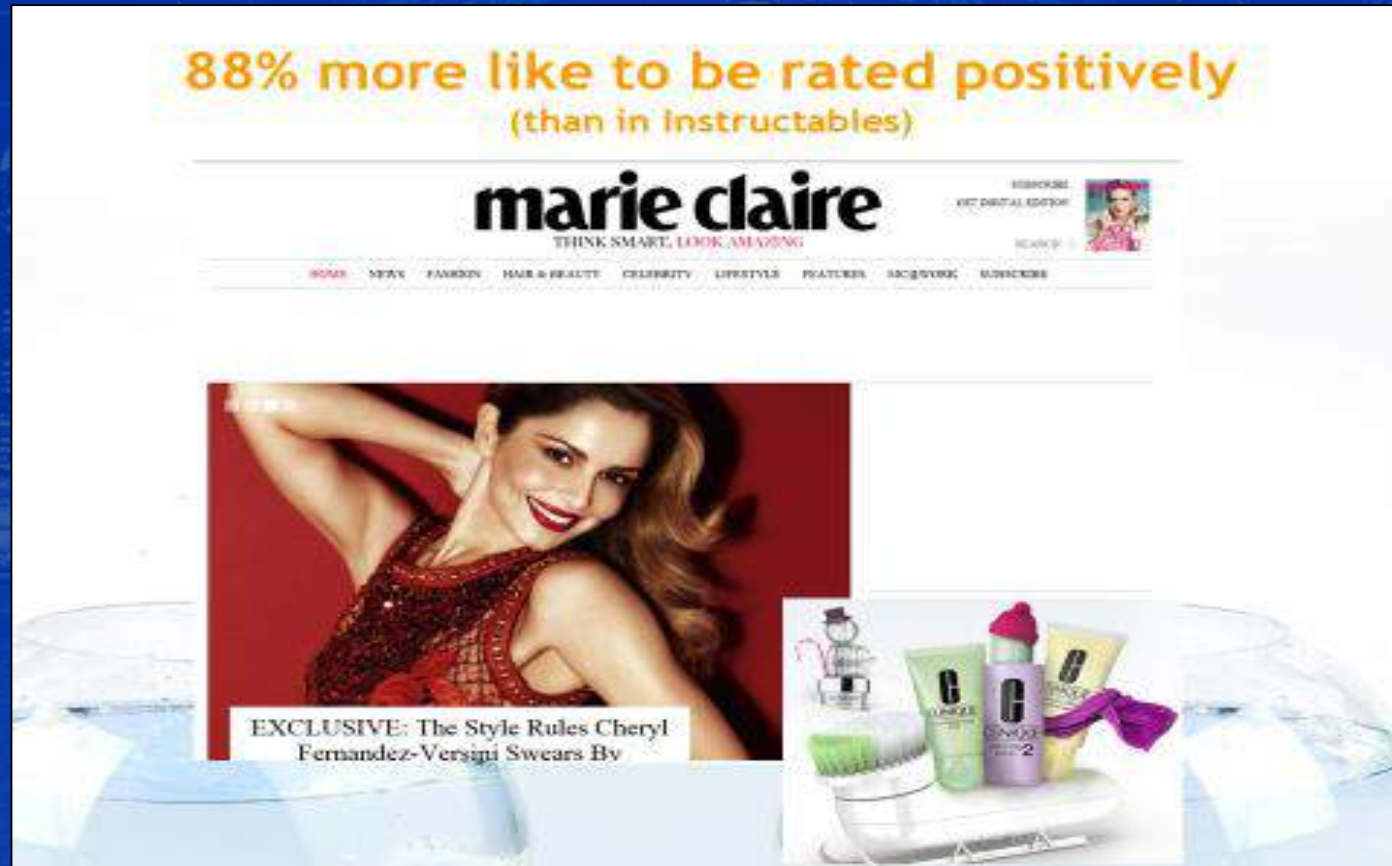


Source:
ISM/RAPP

Brand safety -Increasing recognition of need for trusted and safe environments

Simple research demonstrations

88% more like to be rated positively
(than in Instructables)



The screenshot shows the Marie Claire website interface. At the top, a yellow banner displays the statistic '88% more like to be rated positively (than in Instructables)'. Below this is the 'marie claire' logo with the tagline 'THINK SMART. LOOK AMAZING'. A navigation bar includes links for HOME, NEWS, FASHION, HAIR & BEAUTY, CELEBRITY, LIFESTYLE, FEATURES, SHOPPING, and SUBSCRIBE. A 'SUBSCRIBE KIT: DIGITAL EDITION' button is visible on the right. The main content area features a large image of Cheryl Fernandez-Versini with the headline 'EXCLUSIVE: The Style Rules Cheryl Fernandez-Versini Swears By'. To the right of the image is a collection of beauty products, including a brush, a tube of cream, a bottle of spray, and a jar of cream.

Source:
ISM/RAPP

Advertiser seeing danger to their Brand Values

Simple research to demonstrate trusted and safe environment

**71% more likely to be rated positive
(than on Catster)**

The screenshot displays the front page of The Independent newspaper. At the top, it reads 'THE INDEPENDENT MONDAY 10 NOVEMBER 2014' and 'App | 440k+ | 120k | Being | Show | Sign in | Register'. The masthead 'The INDEPENDENT' is prominent, with a '100' badge. Below the masthead are navigation links: NEWS, VIDEO, PEOPLE, VOICES, SPORT, TECH, LIFE, PROPERTY, ARTS + ENTERTAINMENT, TRAVEL, MONEY, INVESTMENT, STUDENT, OFFERS. A search bar is located on the right. The main content area features a large article titled 'After the storm: What happens when the world's cameras have moved on from natural disasters' with a photo of a destroyed building. Below it is a smaller article 'Syrian militants destroy historic shrine to victims of Armenian genocide' with a photo of a shrine. On the right side, there is a 'NOW TRENDING' section with two items: '1. If you think you can't dance you should probably read this' and '2. Coca-Cola CEO makes blurt to #Hashtag on and how it's changed our world'. A large advertisement for a white Range Rover SUV is positioned on the right side of the page.

Source:
ISM/RAPP

Is the pendulum finally swinging back?

- Unilever and P&G raising these serious issues
- Tesco (Europe's largest retailer) moves back to Print
- *For the first time in 7 years* UK advertising revenue for 'Newsbands' increase with a 1% growth overall and 2.8% for the popular dailies in Q1 2018.
- Maybe we can whisper the 'G' word again
GROWTH in Print?

Is the pendulum finally swinging back?

GROWTH in Print?

Recognition of the issues-a long time in the coming

Raymond Snoody a respected media commentator in the UK

"The (new) numbers suggest a change to the casual laziness that saw ever increasing amounts of advertising pumped into social media and the return of a more sophisticated broadly based approach with individual media being judged on the merits and used in tailored campaigns"

1st August 2018

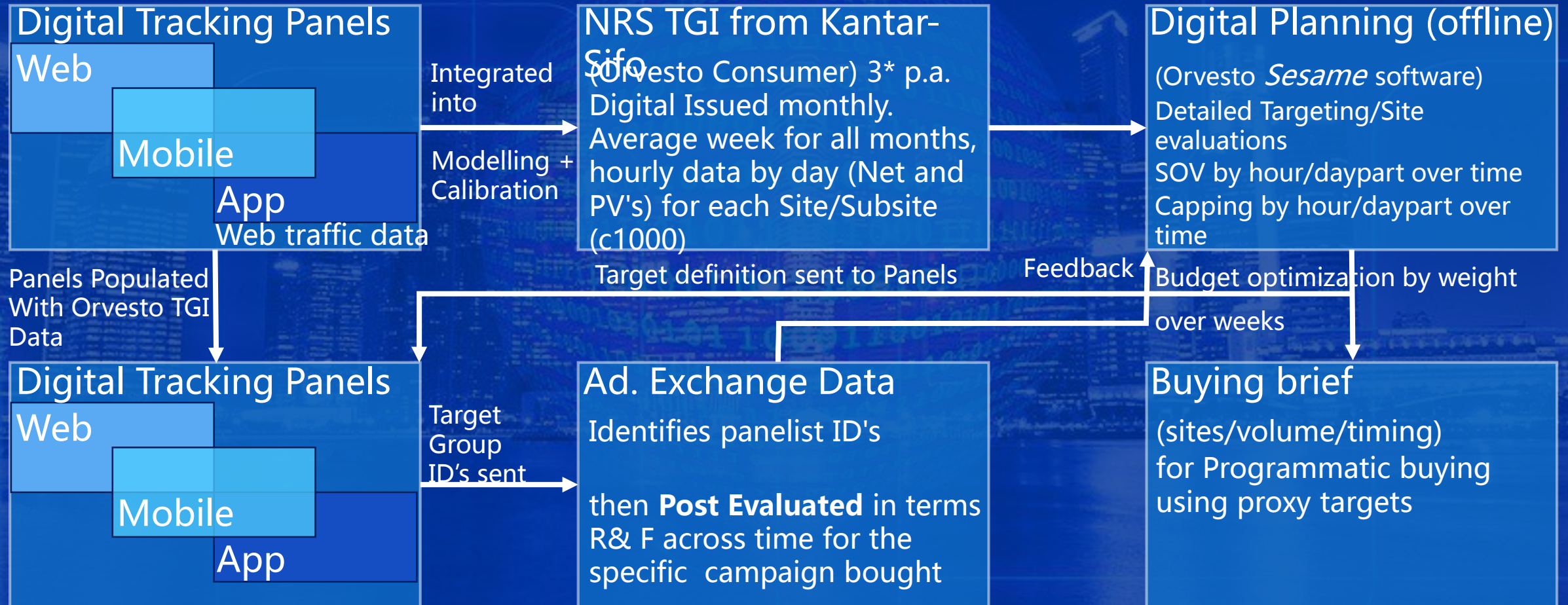
What role can offline Media Research play?

1. Connect offline digital planning to programmatic buying and online post evaluation in terms of real world target markets
2. Provide a cross platform media planning base as a means to engage in a print share discussion *before* it all goes to programmatic
3. Provide 'Total Brand Reach' trend analysis (as a Management planning tool and Public relations/investor tool)

Getting out of the 'commodity market'

- Publishers have to operate in the 'Open Web World' which is a low return 'commodity market'
- Google and Facebook, the 2 biggest threats to Publishers
have 'Walled gardens' with all embracing targeting data their own.
- Publishers need to pool ad. sales to create scale
Offering buyers their own premium (cpt) supply chain that matches FB's Social media scale yet providing data transparency and trusted environments
- The latest such development is the **Ozone project** in the UK, but similar developments have taken place in the Nordic countries and Romania

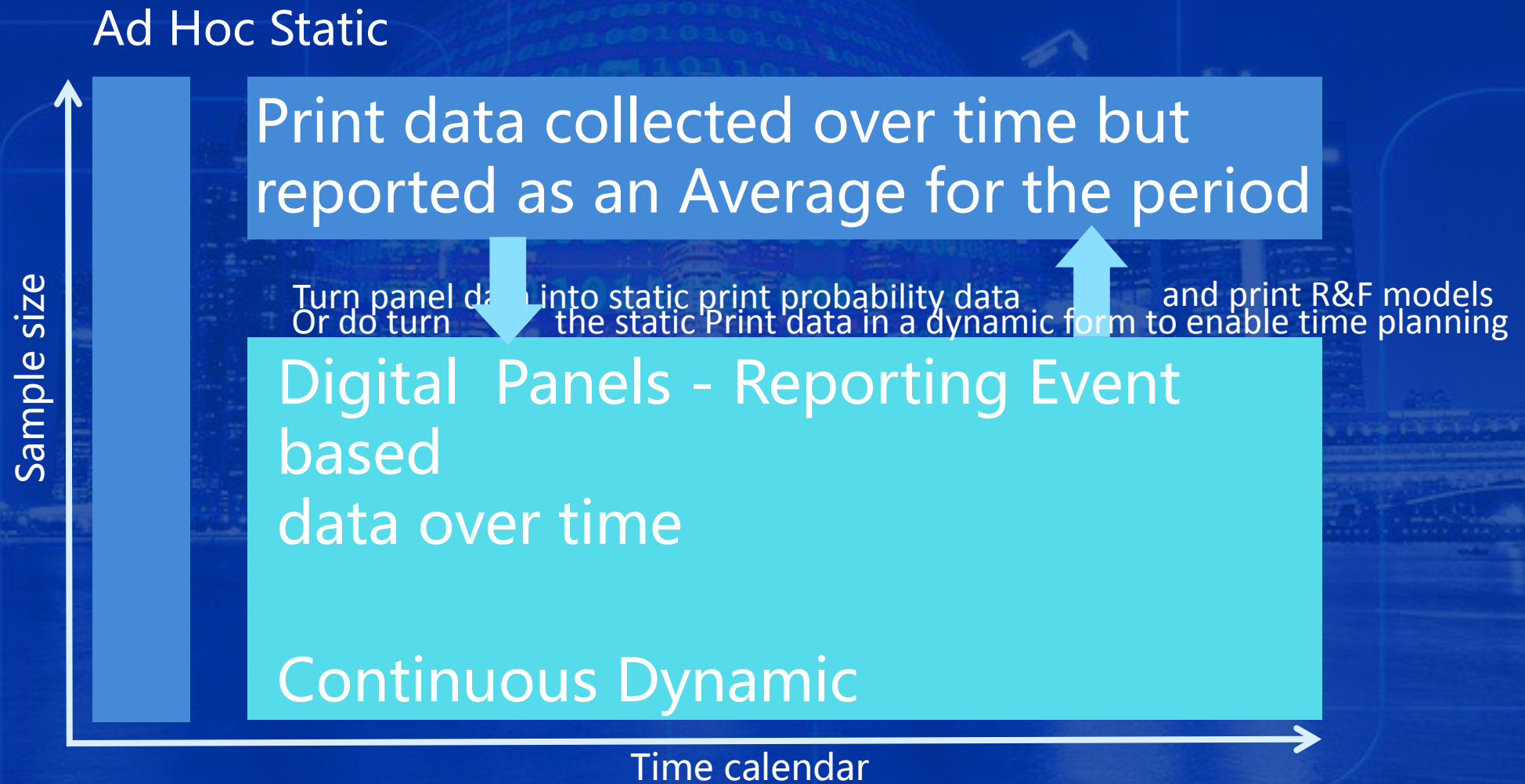
1. Connecting offline digital data with online



2. Making the case for Print share of budget

- We must integrate the Print data with the Digital
- One data set must be the 'host' (normally the print survey, having the better quality sample and targeting data)
- We must add additional data on 'digital' in the 'host survey' to control the integration (especially duplication)
- Then we have to harmonize the evaluation metrics so that they are comparable

Print and Digital Research – A world apart



Problems with Print/Digital comparisons

Print

- Measures Issue Reach not the Ad. Page Reach (over-estimates Net)
- Does not report multiple reading events (large underestimate of Gross, increases cpt)
- Normally has no quality of reading measure (e.g. time spent)
- Print assumes that all reading takes place at once (no time planning)

Problems with Print/Digital comparisons

Digital

- Ads. are not bought by 'Issues'
(Content updates can be at any time).
- They are bought by quantity (of individual browser ID's) within time periods (SOV).
- Gross contacts (Page Views) are the key metric
(not Net reach as in Print)

Print data question extensions

- Proportion of issue read
= from Issue Exposure to Ad exposure
- Number of times issue picked up to read
= Gives gross Ad. reading opportunities
- Time spent reading
= strong argument for Print
- The delivery software needs to be able to apply this data in ranking and R&F analyses

Data integration into NRS

Digital side question extensions (within NRS)

- Recency of visit to each site/main subsite by platform (Yesterday/last week//last month)
- Frequency of visit to each site by platform
- Generic questions on time bands within day of week respondent is 'on line' by platform

Making the case for Print share



	Sunday Newspaper	Ad. Exposure	Week Net Reach %	Week Gross TRP's	Average OTS	Av. Time reading TotalPer visit		Target Selectivity Gross Net		Target Gross cpt €
Recent Reading Print	Issue	Issue	7.1	7.1	1	-	-	117	117	446
Recent Visiting Site	Site	Ad.	13.4	64.9	4.8	29.4	6.1	145	139	90
Brand buy 1	1*1/2 pg	Issue Ad.	19.2	72	3.8	-	-	142	129	145
Cost	100% SOV									142,000

Target: ABC1 Spirit drinkers. 24.3% of Pop

Source, Greek NRS 2017:2

Making the case for Print Share



	Sunday Newspaper	Ad. Exposure	Week Net Reach %	Week Gross TRP's	Average OTS	Av. Time reading. Total/Per visit		Target Selectivity Gross Net		Target Gross cpt €
Recent Reading RR+QRS	Print	Issue Ad.(0.8)	7.1 6.7	7.1 14.0	1 2.2	- 60.5	- 28.8	117 135	117 138	446 214
Recent Visiting Panel Modelled	Site	Ad. -	13.4 5.7	64.9 5.9	4.8 1.0	29.4 6.1	6.1 5.9	145 132	139 135	90 93
	10% SOV									
Brand buy 1	1*1/2 pg	Issue Ad.	19.2	72	3.8	-	-	142	129	145
Cost										142,000
Brand buy	2*1/4 pg.	Ad.	11.5	23.9	2.9	-	-	134	137	100
Cost	10% SOV									59,175

Target: ABC1 Spirit drinkers. 24.3% of Pop

Source, Greek NRS 2017:2

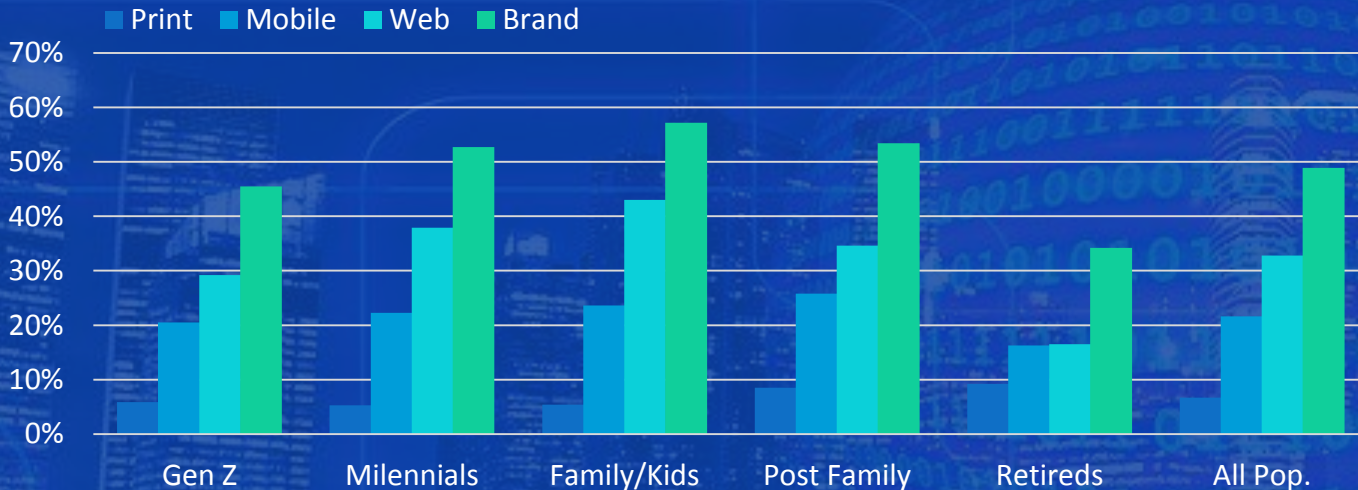
3. Brand Reach

- A static measurement
AIR (press) + Daily Net reach (Digital)
- All the data required is available in the previous 2 processes (Digital Planning and cross platform share planning)
- The issue is one for a quick, easy and clear presentation of the results
- We present our Brand data as a dashboard.

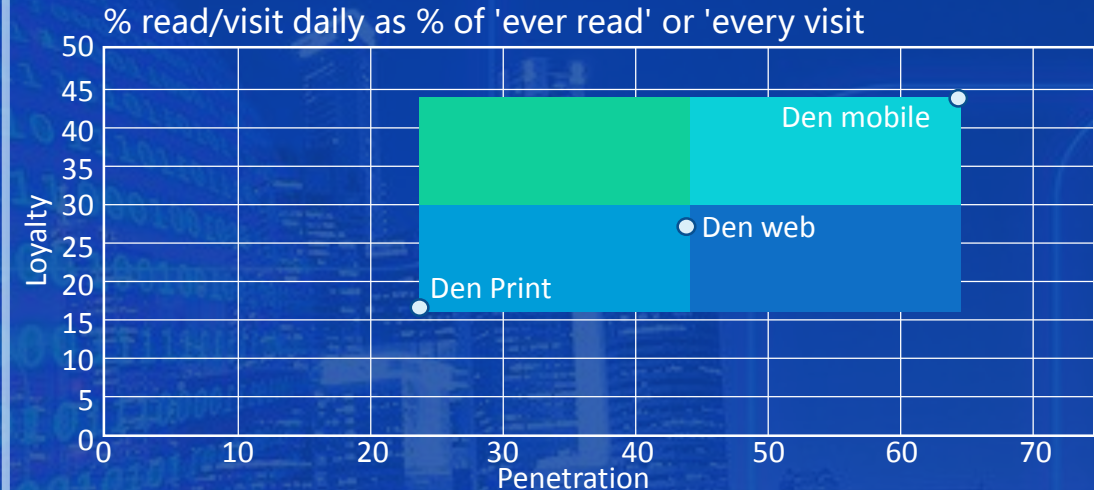
Orvesto Consumer Brand Reach Analysis 2018:1/Jan Digital

Daily Evening Newspaper

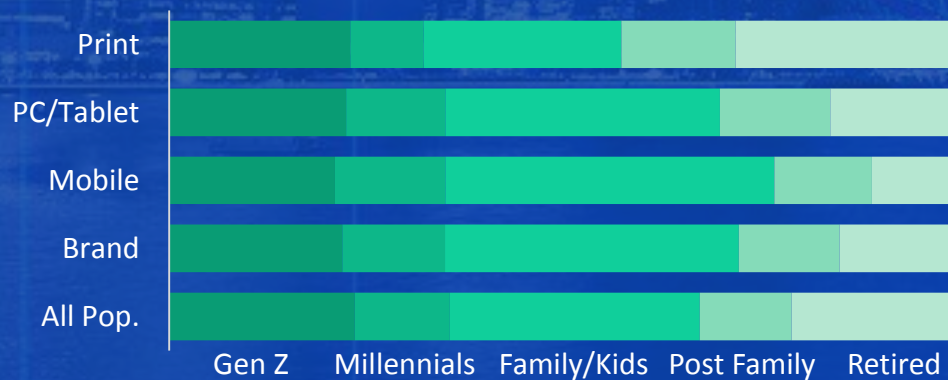
XXX Brand Net Reach by Platform by Lifestage



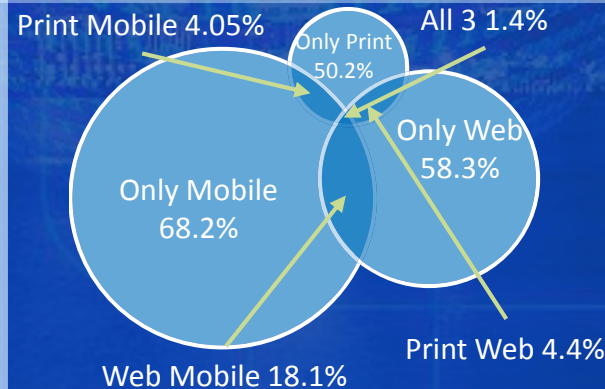
Brand Loyalty by Platform'



Brand Profiles by Life-stage



Brand Platform Overlap



Brand Growth, Platform Shares

Platform	Brand Net%	2015:1	2016:1	2017:1	2018.1
Print	43.2	15	13.4	11.8	11
Web	43.2	39.9	39.9	35.8	35.4
Mobile	44.6	45.1	46.7	52.4	53.7