The World Wide Web

& Print Media

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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

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2008 The World Wide Web 2021

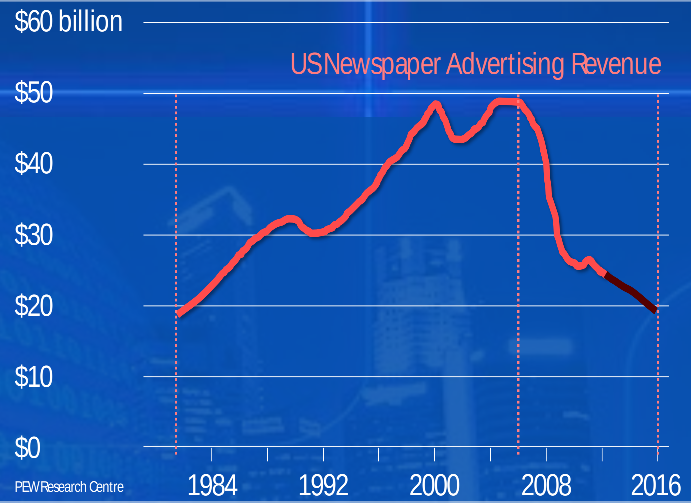
2018

$266 Billion ad Revenue

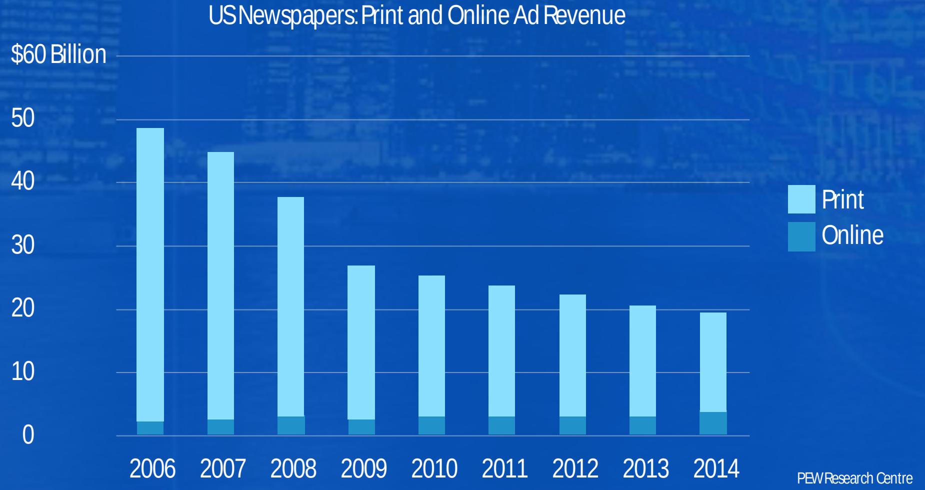
< 10% ➞ 42% ➞ 50%

Now exceeds broadcast TV advertising

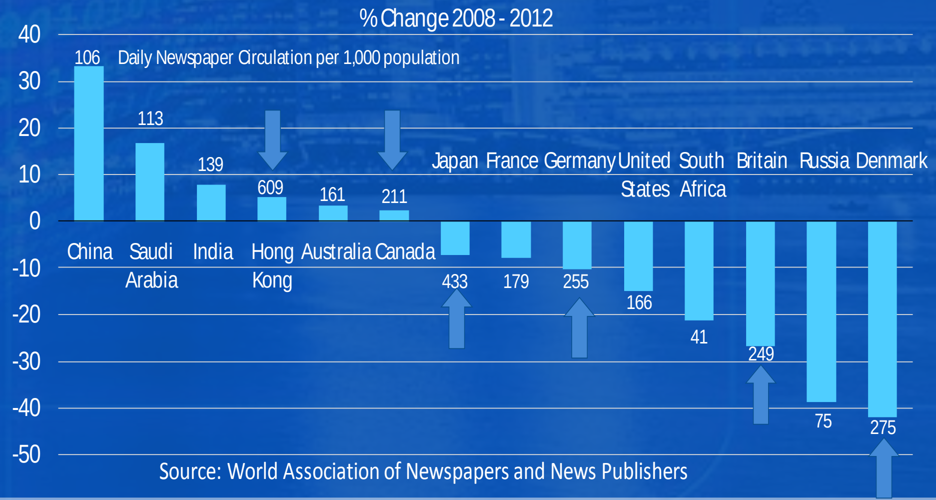
25 years of ad.sales growth lost in 10



Low Yield Digital is far from Compensating this Revenue Loss

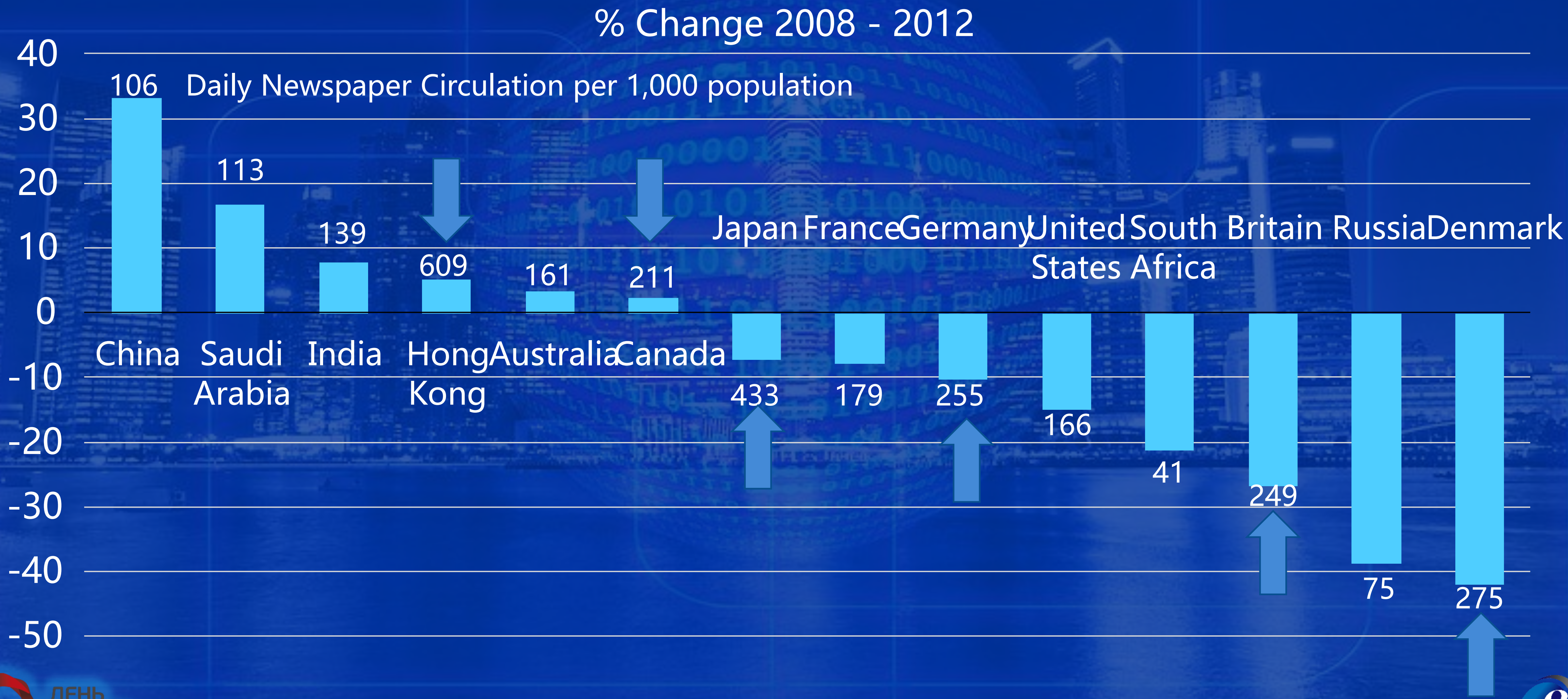


Daily Newspaper circulation



Source: World Association of Newspapers and News Publishers

Daily Newspaper circulation



Source: World Association of Newspapers and News Publishers

Digital innovation has 2 sides

On the one side

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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

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
	$93.97B	

Source e-marketer Sept 2017

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Digital innovation has two sides

- On the other side

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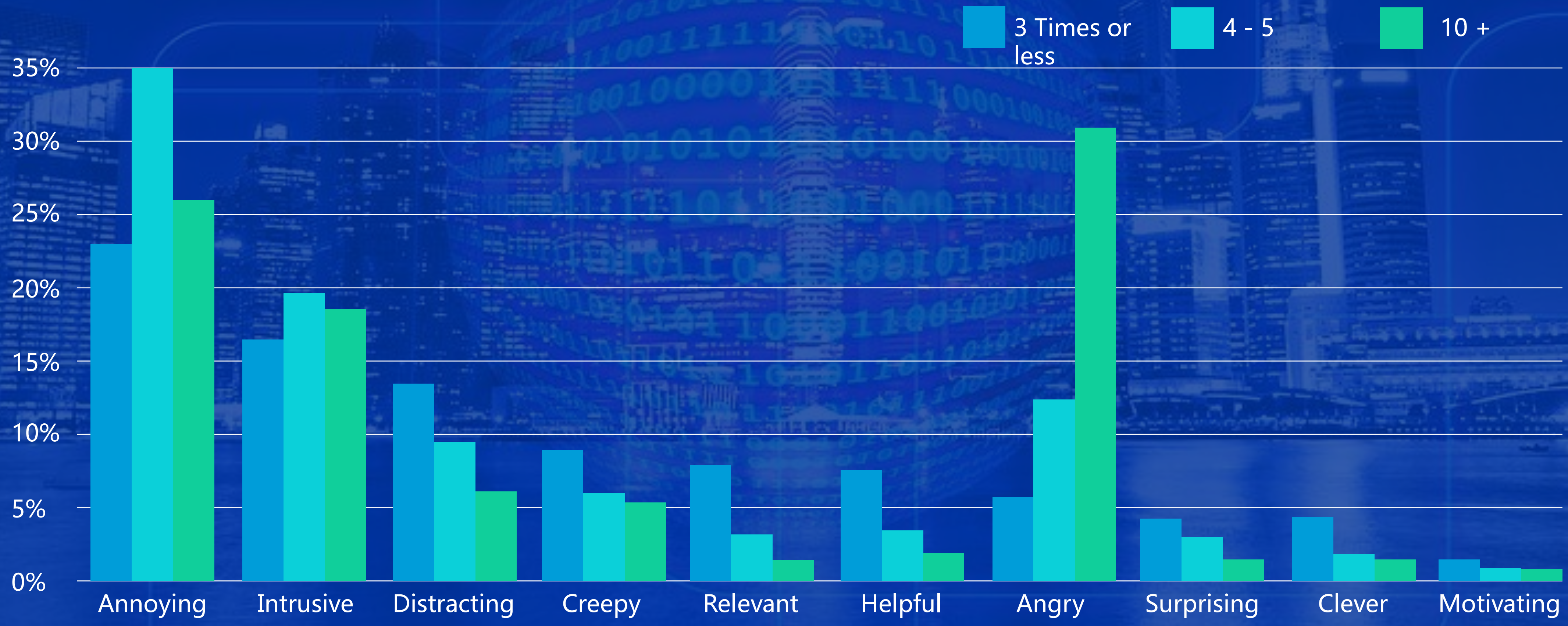
Is the love affair with digital beginning to cool?

- 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

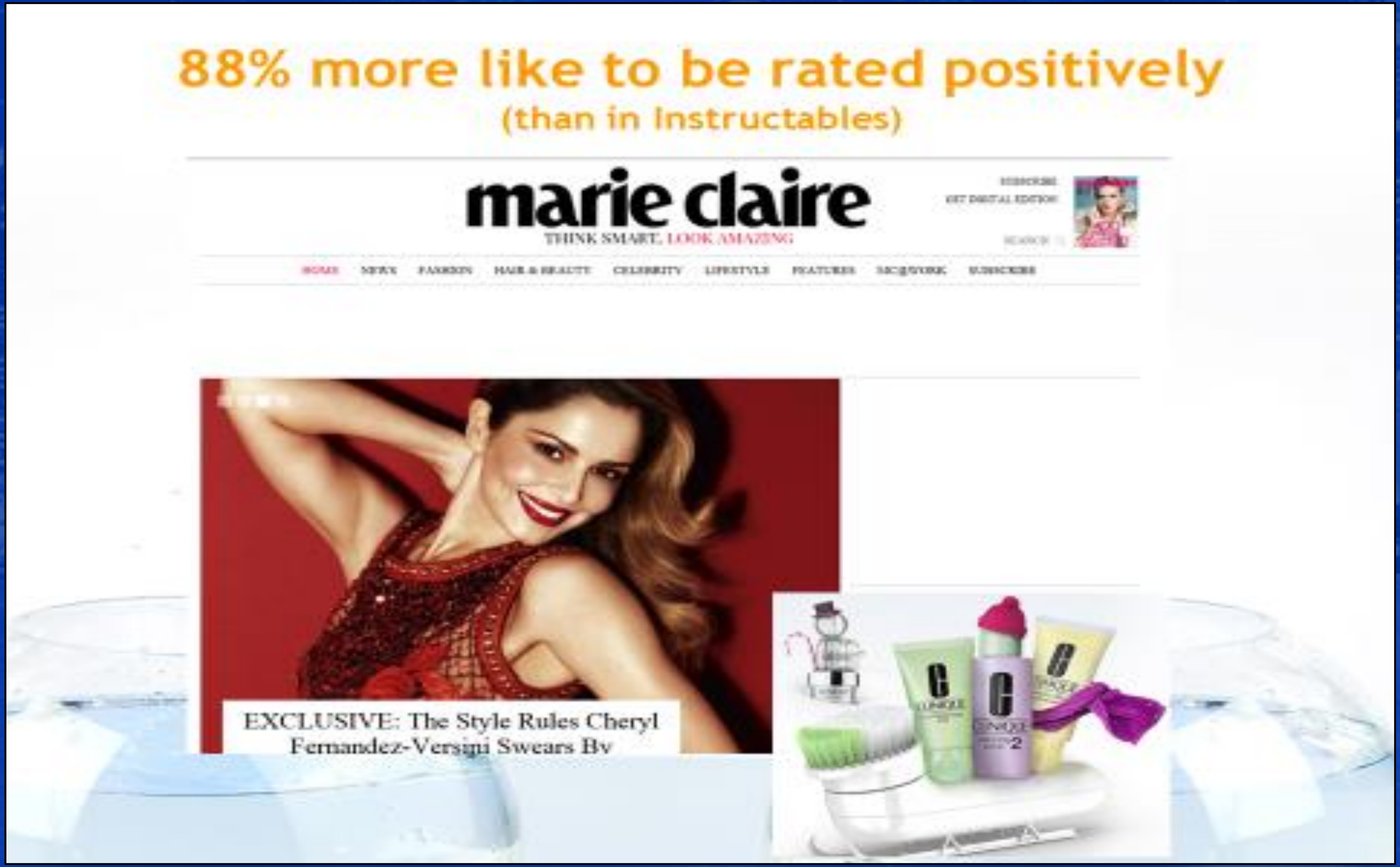
- Demonstrating danger of excessive retargeting on Brand Values



Source: ISM/RAPP

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

Simple research demonstrations



Source: ISM/RAPP

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Advertiser seeing danger to their Brand Values

Simple research to demonstrate trusted and safe environment

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?

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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

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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

Digital Tracking Panels

Web

Mobile

App

Web traffic data

Integrated into

Modelling + Calibration

NRS TGI from Kantar-Sifo

(Orvesto Consumer) 3* p.a. Digital Issued monthly. Average week for all months, hourly data by day (Net and PV's) for each Site/Subsite (c1000)

Digital Planning (offline)

(Orvesto *Sesame* software)

Detailed Targeting/Site evaluations

SOV by hour/daypart over time

Capping by hour/daypart over time

Budget optimization by weight over weeks

Feedback

Target definition sent to Panels

Panels Populated With Orvesto TGI Data

Digital Tracking Panels

Web

Mobile

App

Target Group ID's sent

Ad. Exchange Data

Identifies panelist ID's

then **Post Evaluated** in terms R& F across time for the specific campaign bought

Buying brief

(sites/volume/timing)

for Programmatic buying using proxy targets

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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

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Print and Digital Research – A world apart

Ad Hoc Static

Print data collected over time but reported as an Average for the period

Turn panel data into static print probability data and print R&F models

Or do turn the static Print data in a dynamic form to enable time planning

Digital Panels - Reporting Event based
data over time

Continuous Dynamic

Sample size

Time calendar

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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)

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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

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Making the case for Print share

	Sunday Newspaper	Ad. Exposure	Week Net Reach %	Week Gross TRP's	Average OTS	Av. Time reading Total	Av. Time reading Per visit	Target Selectivity Gross	Target Selectivity Net	Target Gross cpt €
Recent Reading	Print	Issue	7.1	7.1	1	-	-	117	117	446
Recent Visiting	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

ДЕНЬ БРЕНДА

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	Print	Issue	7.1	7.1	1	-	-	117	117	446
RR+QRS	Print	Ad.(0.8)	6.7	14.0	2.2	60.5	28.8	135	138	214
Recent Visiting	Site	Ad.	13.4	64.9	4.8	29.4	6.1	145	139	90
Panel Modelled	Site 10% SOV	-	5.7	5.9	1.0	6.1	5.9	132	135	93
Brand buy 1	1*1/2 pg 100% SOV	Issue Ad.	19.2	72	3.8	-	-	142	129	145
Cost										142,000
Brand buy	2*1/4 pg. 10% SOV	Ad. Ad.	11.5	23.9	2.9	-	-	134	137	100
Cost										59,175

Target: ABC1 Spirit drinkers. 24.3% of Pop

Source, Greek NRS 2017:2

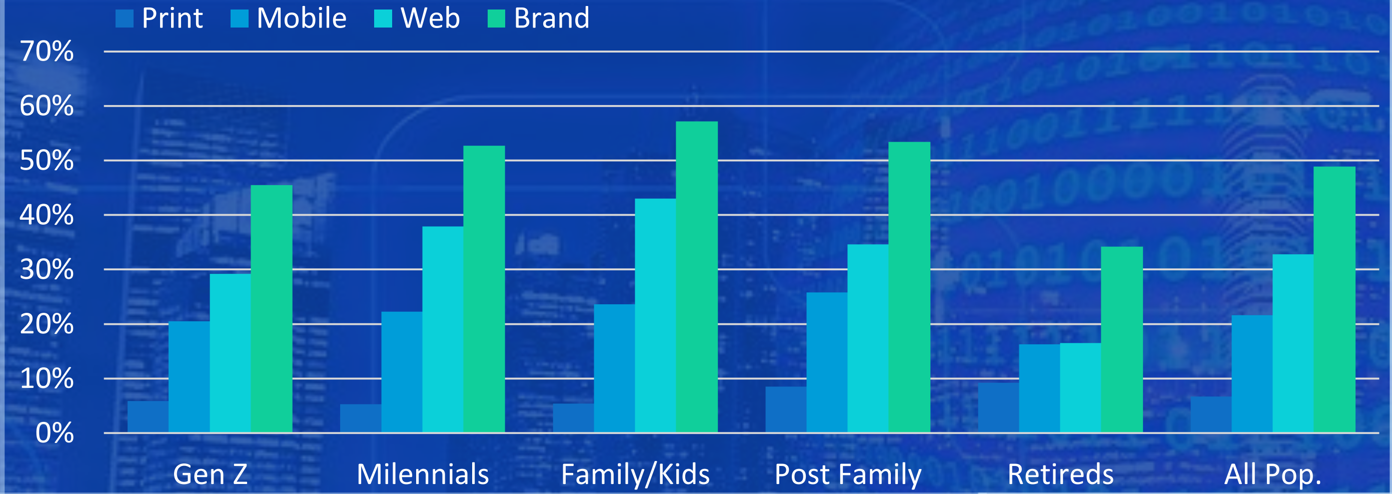
3. Brand Reach

- 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.

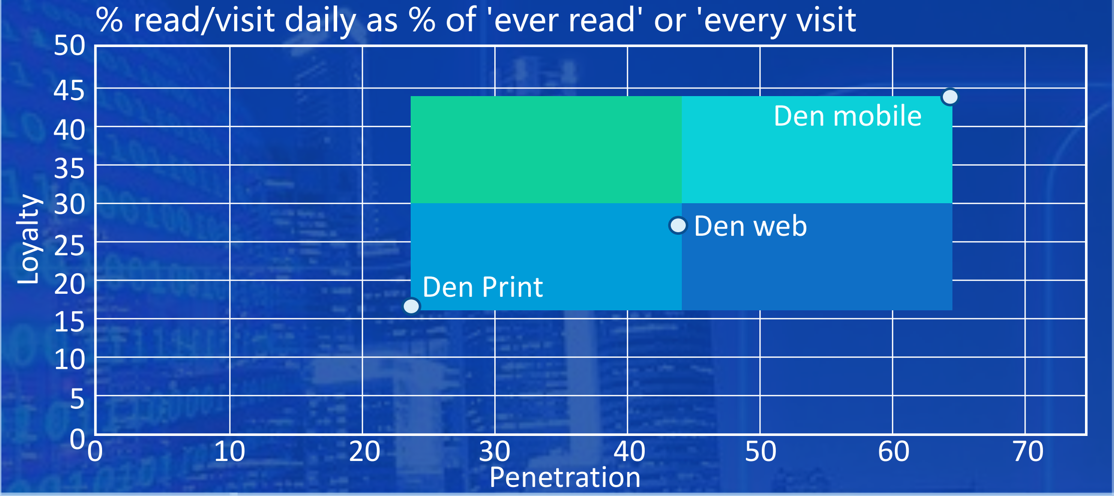
Orvesto Consumer Brand Reach Analysis 2018:1/Jan
Digital

Daily Evening Newspaper

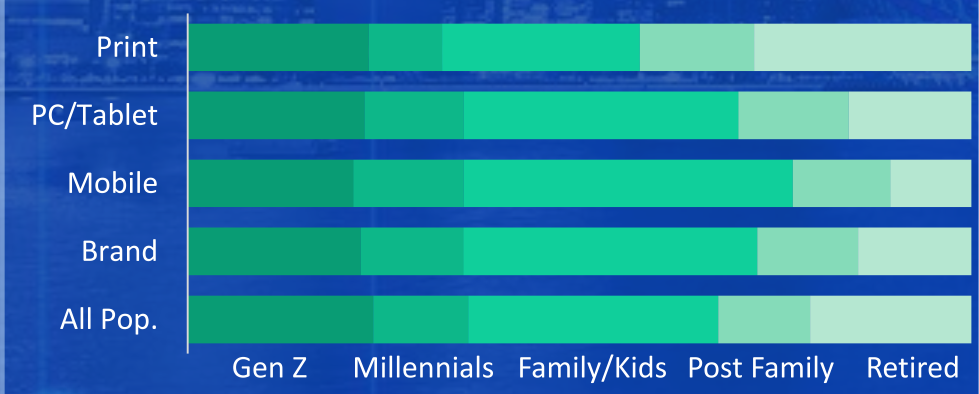
XXX Brand Net Reach by Platform by Lifestage



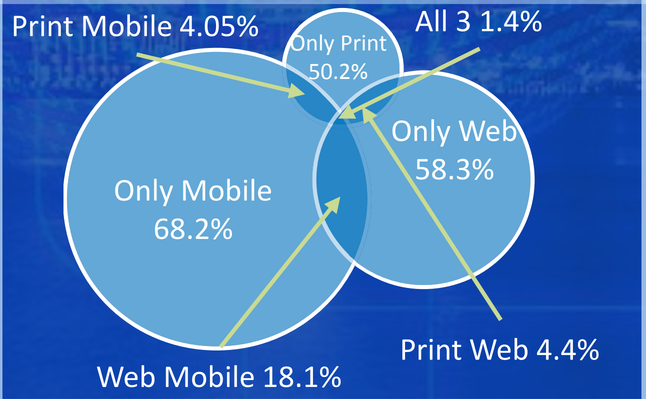
Brand Loyalty by Platform'



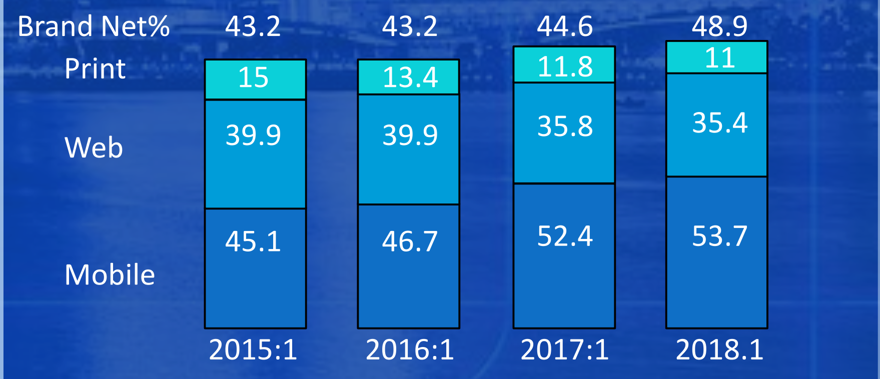
Brand Profiles by Life-stage



Brand Platform Overlap



Brand Growth, Platform Shares



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