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
Programmatic has turned ad. buying and selling into a ‘commodity market’ driven by a set of simplistic rules based on cpt and volume/repetition.
The World Wide Web

2008

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

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?

<table>
<thead>
<tr>
<th>Net US Ad. Revenues</th>
<th>% Share</th>
<th>Index on 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google/YouTube</td>
<td>42.7</td>
<td>104</td>
</tr>
<tr>
<td>Facebook/Instagram</td>
<td>23.0</td>
<td>133</td>
</tr>
<tr>
<td>MS/Linkedin/Oath/Amazon/Twitter</td>
<td>11.7</td>
<td>157</td>
</tr>
<tr>
<td>All Others</td>
<td>22.6</td>
<td>61</td>
</tr>
</tbody>
</table>

Source: e-marketer Sept 2017

Total US Ad. Revenues: $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)

Source: ISM/RAPP
Advertiser seeing danger to their Brand Values

Simple research to demonstrate trusted and safe environment
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?
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

Digital Tracking Panels
- Web
- Mobile
- App

Web traffic data

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)

Integrating into Modelling + Calibration

Detailed Targeting/Site evaluations
- SOV by hour/daypart over time
- Capping by hour/daypart over time
- Budget optimization by weight over weeks

Digital Planning (offline)
- (Orvesto Sesame software)
- Identifying panelist ID's

Buying brief
- (sites/volume/timing) for Programmatic buying using proxy targets

Target definition sent to Panels

Feedback

Ad. Exchange Data
- Identifies panelist ID's
- Post Evaluated in terms R&F across time for the specific campaign bought
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

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

Digital Panels - Reporting Event based data over time

Continuous Dynamic

- Turn panel data into static print probability data
- Or do turn the static Print data in a dynamic form to enable time planning
- and print R&F models

Ad Hoc Static

Sample size

Time calendar
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

<table>
<thead>
<tr>
<th>Sunday Newspaper Exposure</th>
<th>Ad.</th>
<th>Week Net Reach %</th>
<th>Week Gross TRP’s</th>
<th>Average OTS</th>
<th>Av. Time reading</th>
<th>Target Selectivity</th>
<th>Target Gross cpt €</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent Reading Print</td>
<td>Issue</td>
<td>7.1</td>
<td>7.1</td>
<td>1</td>
<td>-</td>
<td>117</td>
<td>117</td>
</tr>
<tr>
<td>Recent Visiting Site</td>
<td>Ad.</td>
<td>13.4</td>
<td>64.9</td>
<td>4.8</td>
<td>29.4</td>
<td>6.1</td>
<td>145</td>
</tr>
<tr>
<td>Brand buy 1 1*1/2 pg 100% SOV</td>
<td>Issue</td>
<td>19.2</td>
<td>72</td>
<td>3.8</td>
<td>-</td>
<td>142</td>
<td>129</td>
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Target: ABC1 Spirit drinkers. 24.3% of Pop

Source, Greek NRS 2017:2
## Making the case for Print Share

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<tr>
<td>RR+QRS</td>
<td>Ad.(0.8)</td>
<td>6.7</td>
<td>14.0</td>
<td>2.2</td>
<td>60.5</td>
<td>28.8</td>
<td>135</td>
<td>138</td>
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<td>Recent Visiting</td>
<td>Site</td>
<td>Ad. -</td>
<td>13.4</td>
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<td>29.4</td>
<td>6.1</td>
<td>145</td>
</tr>
<tr>
<td>Panel Modelled Site</td>
<td>10% SOV</td>
<td></td>
<td></td>
<td></td>
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<tr>
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<td>1*1/2 pg, 100% SOV</td>
<td>Issue Ad.</td>
<td>19.2</td>
<td>72</td>
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<td>-</td>
<td>-</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brand buy 2*1/4 pg.</td>
<td>10% SOV</td>
<td>Ad. Ad.</td>
<td>11.5</td>
<td>23.9</td>
<td>2.9</td>
<td>-</td>
<td>-</td>
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**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

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**Brand Net Reach by Platform by Lifestage**

- **Print**: Gen Z, Millennials, Family/Kids, Post Family, Retireds, All Pop.
- **Mobile**: Gen Z, Millennials, Family/Kids, Post Family, Retireds, All Pop.
- **Web**: Gen Z, Millennials, Family/Kids, Post Family, Retireds, All Pop.
- **Brand**: Gen Z, Millennials, Family/Kids, Post Family, Retireds, All Pop.

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**Brand Loyalty by Platform**

- Den Print
- Den Web
- Den Mobile

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**Brand Platform Overlap**

- Print Mobile 4.05%
- Only Print 50.2%
- Only Web 58.3%
- Print Web 4.4%
- Web Mobile 18.1%

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**Brand Growth, Platform Shares**

<table>
<thead>
<tr>
<th>Year</th>
<th>Print Net%</th>
<th>Web Net%</th>
<th>Mobile Net%</th>
</tr>
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<tbody>
<tr>
<td>2015:1</td>
<td>15</td>
<td>39.9</td>
<td>45.1</td>
</tr>
<tr>
<td>2016:1</td>
<td>13.4</td>
<td>39.9</td>
<td>46.7</td>
</tr>
<tr>
<td>2017:1</td>
<td>11.8</td>
<td>35.8</td>
<td>52.4</td>
</tr>
<tr>
<td>2018:1</td>
<td>11</td>
<td>35.4</td>
<td>53.7</td>
</tr>
</tbody>
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**Daily Evening Newspaper**

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**XXX**

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