EVANGELISING BRAND OWNERS AND AGENCIES

PRINT POWER

CONTENT

- What does Print Power do?
- The competitive arena
- What is required to convince agencies and advertisers
- How can we support each other

WHAT IS PRINT POWER

EURO-GRAPH* COMMUNICATION CAMPAIGNS

Sustainability

TWO SIDES

Effectiveness

PRINT POWER

* European association of paper manufacturers

PRINT POWER

- Launched in 2009, active in 13 countries
- As of 2018 focus on three major countries**: UK, Germany and France**

Focus on:

- Well defined selection of Top 10 brand owners in 6 product categories
- Focus on advertising and media agencies part of the 6 global advertising holdings

key decision makers of media budget allocation

OBJECTIVES

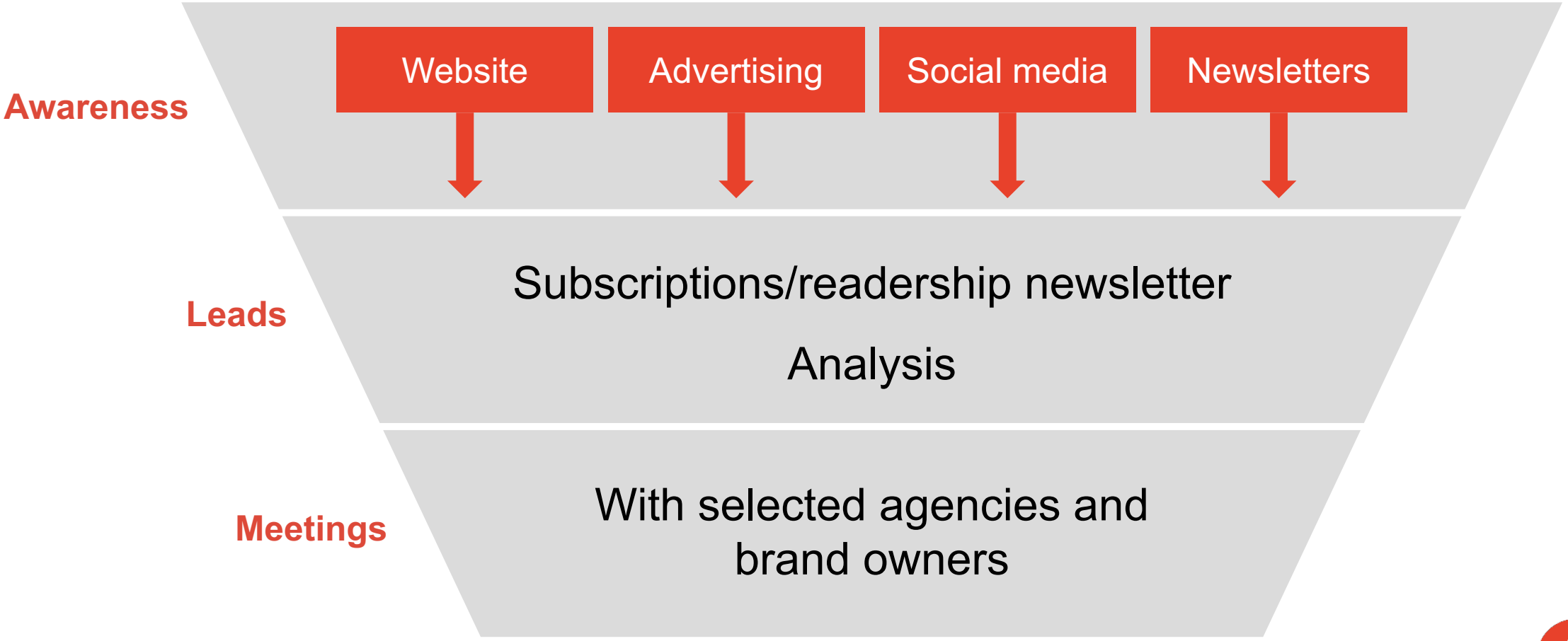
Communication Objectives

- Change the perceptions of the effectiveness of advertising in print(ed) media
- Facilitate meetings with key decision-makers

Key message

- Advertising in printed media like newspapers, magazines, direct mail, customer magazines, door drops or catalogues adds to the overall effectiveness of the media mix

CAMPAIGN GOALS AND PROCESS



2018 STRATEGY

Create convincing on-target communication to change people's perception about print media

- Select, identify & reach target audience **= KPI**
- Convert to newsletter subscribers **= KPI**
- Meet with frequent readers of content **= KPI**

Campaign timeline

2018 **2019** **2020**

Always-on
Website, social media, infographics, videos, banners

THE CAMPAIGN

https://www.printpower.fr/actualités/star-le-jargon-tenez-vous-en-aux-faits/

PRINT POWER CAMPAIGN

IN PRAISE OF SIMPLICITY

An open letter to marketers

WE FEEL YOUR PAIN

How's that for an opener? No doubt you have already followed the clue in red and flicked your eyes to the bottom of this page to see who we are and what our agenda is. If you haven't, do it now. We've made it easy for you by using a bit of white space, a clear font, a little logo and some handy contact details. See you back here in a sec.

Back? Great.

"WHAT PAIN?" YOU ASK

The one you told us about. For the last few months, we have been talking to a host of professionals responsible for making decisions about how and where to spend marketing budgets with the greatest impact and demonstrable cost-efficiency.

You told us about the challenges and pressures you face every day and we'd like to help.

OVERWHELMING COMPLEXITY

In 2017, Martech published an overview of the marketing technology landscape showing that in just one year it had grown by 40%[1]. IPSOS tells us that consumers are reacting to this excess of information by actively disengaging. And it is your job to somehow take in all of this information and make sense of it.[2]

We'd like to help find a path through the clutter.

THE CART IS LEADING THE HORSE

The days of media-agnostic briefs are long gone. Clients have preconceptions about media. They are only human after all (despite what you may sometimes think). There is an increasing disconnect between media and creative strategies – frequently, media commitments are made long before communication strategies are settled and opportunities for innovation are being lost.

We'd like to help restore joined-up thinking.

DIGITAL HAS LOST ITS SHINE

For a while the attractive allure of the new became its own justification. But the discrepancy between the digital dream and the digital reality is being increasingly questioned. When you have a shiny new hammer, it is tempting to make every problem look like a nail.

We'd like to help you explore all the possibilities in your toolbox.

JARGON ISN'T HELPING

Do you still talk of "traditional" and "new" media? We've learned that the distinction between 'below' and 'above' the line is neither relevant nor useful. Perhaps it is time to ditch these other terms too? All media choices can be valid ones without having to label them in ways which invite out-of-date prejudice. This became all too clear in an objectively rigorous survey from Ebiquity last year, which demonstrated how much time-honoured media choices are currently being undervalued and neglected[3]... even dismissed.

We'd like to help rehabilitate the classics.

FOR YOUR CONSIDERATION

BACK TO BASICS

Remember this?

Right message. Right people. Right time.

Use those principles to evaluate your choices and you can find your way out of every marketing challenge you face.

'Being smart, being innovative, being daring, taking unfair advantage. I love that thinking wherever you find it.'

Dave Trott - advertising veteran and strategic guru[4]

'Media like radio and newspapers are dismissed far too easily by marketers, who need to open their minds to the real possibilities that these fantastic channels can offer... I am saying if you do not ask your media agency to include radio and news media in your initial consideration you are a fool.'

Mark Ritson - Marketing Week[5]

OUR PITCH

We passionately believe in the power of print in all its forms.

Its history can be traced back to papyrus in ancient Egypt, and to the Song dynasty in China. It worked then and it still does. Print isn't historic, traditional or yesterday. It is timeless.

Just as relevant, important, personal, immediate and compelling as ever. And still innovating.

Print can help you cut through the marketing maze.[6]

Whether you need to build a brand, provide product information or announce a deal, there is a version of print that can help. We think that print can always enhance a multi-channel plan.

We'd like to help you see how.

We dedicate ourselves to helping you unlock the power of print, providing advertisers – and all media decision-makers – with the resources and support they need to make informed, responsible and confident choices.

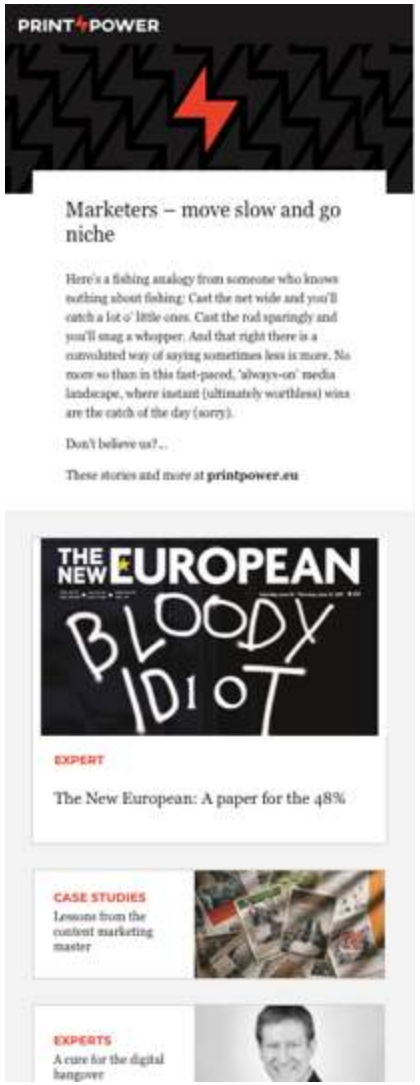
We are

PRINT POWER

www.printpower.eu

and we'd like to help you cut through the #:)@*!

Shazam me to find out more



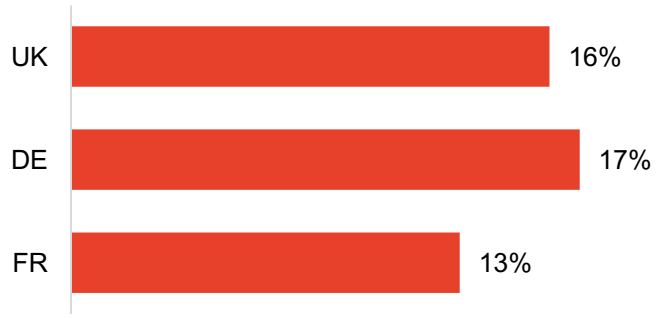
RESULTS

2017		2018	
?	Audience size	1,393,140	
65,000 Reach	Reach / impressions	8,925.117 Impressions	
14,043 (12 months)	Website visitors	45,881 (3-7 months)	*Note that UK website only launched in April. French and German websites only in July. Numbers up to 25th Oct*
42,000	Subscribers	17,000	*Number down due enrichment, filters and GDPR*
250	New leads	355	*Only covers 7 resp. 3 months*
?	Meetings	13	

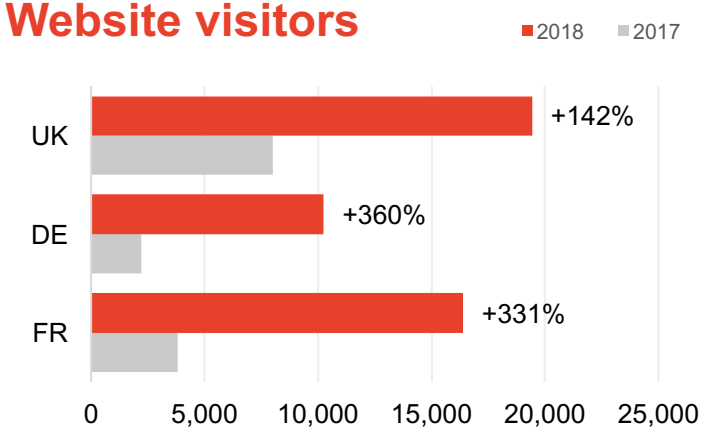
Data up to 16 November 2018

REACH AND SELECTIVITY

Effective reach target audience

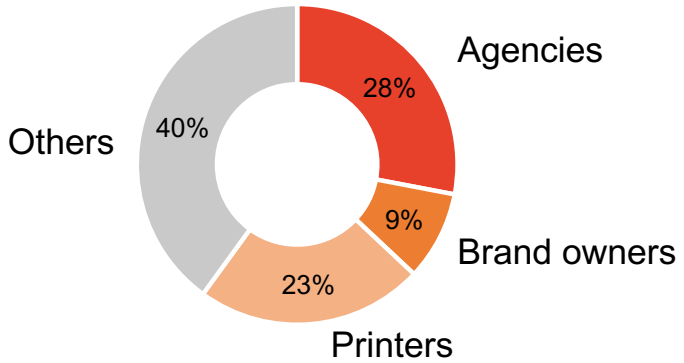


Website visitors

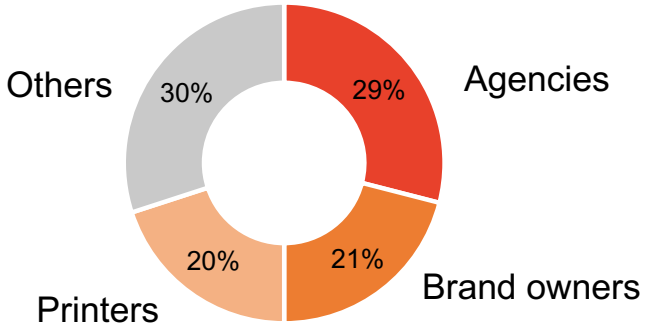


Profile newsletter

Leads

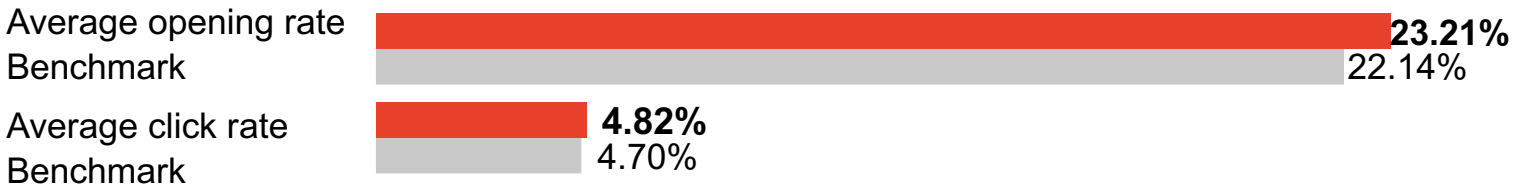


Frequent readers



Newsletter effectiveness

4 Newsletters | 77,736 audience



REACH AND SELECTIVITY – MEETINGS

Agencies

Initiative
OMD
PUBLICIS GROUPE
Starcom
OmnicomMediaGroup
serviceplan gruppe
Zenith The ROI agency
SPARK FOUNDRY

5 agencies in FR

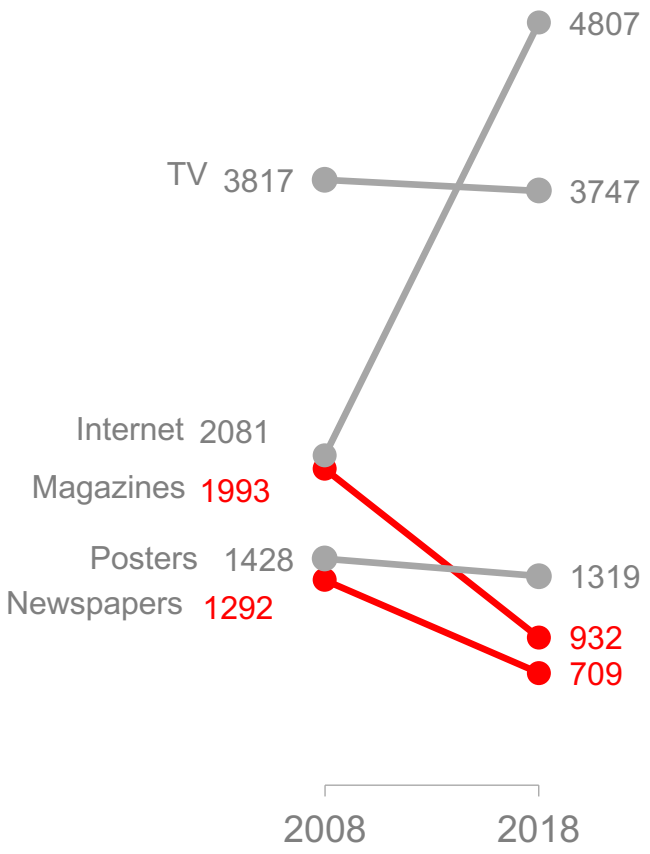
Strong leads financial sector

Brand	Number of readers Newsletter
CRÉDIT AGRICOLE	26
Amundi ASSET MANAGEMENT	10
HSBC	5
first direct	3

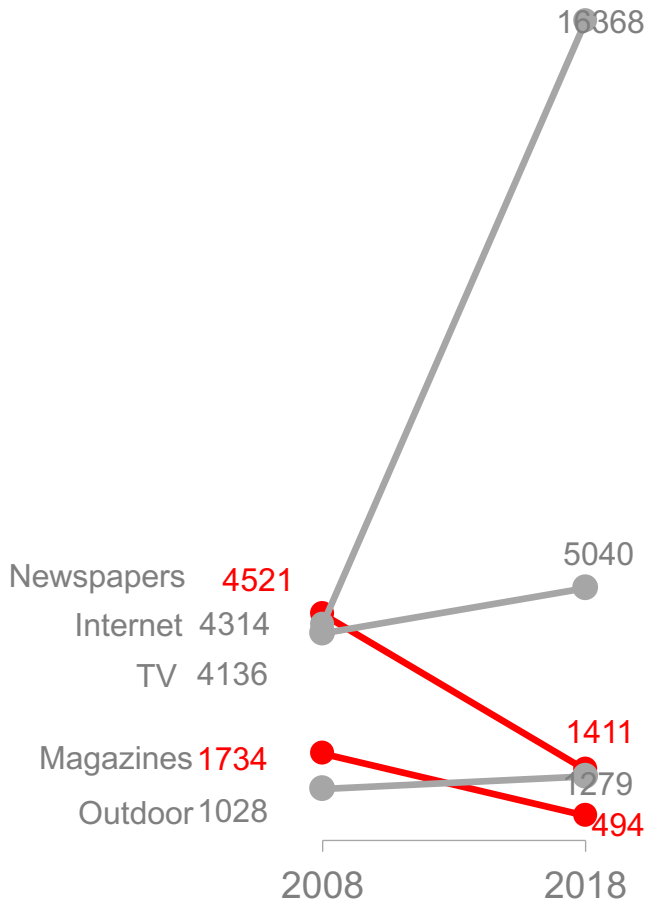
THE COMPETITIVE ARENA

ADVERTISING EXPENDITURES (MIO $)

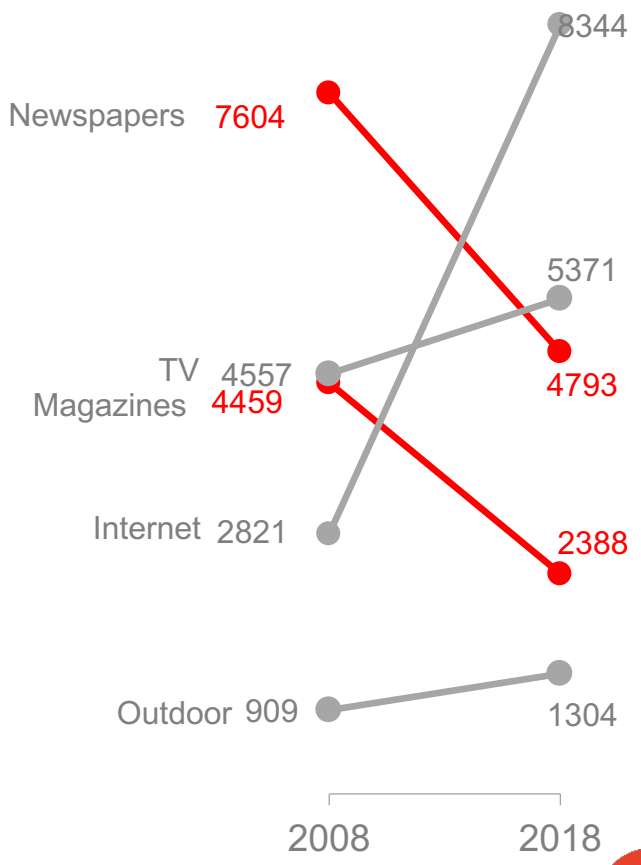
France



UK



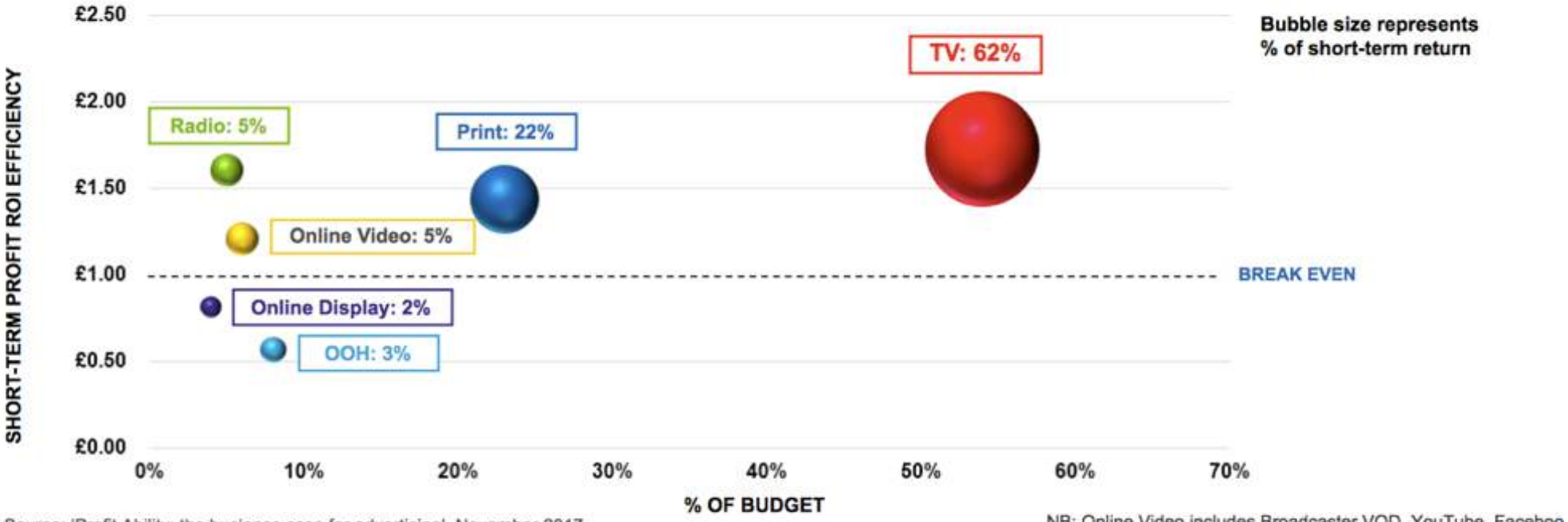
Germany



Source: ZenithOptimedia, December 2018

THINKBOX

TV creates 62% of short-term profit at the highest efficiency (all categories)



Source: 'Profit Ability: the business case for advertising', November 2017
Ebiquity ROI campaign database (Feb'14-May'17). Campaign obs: 1954

NB: Online Video includes Broadcaster VOD, YouTube, Faceboo
video & online programmatic video

IAB

From analysis of these 675 campaigns, on average, digital display advertising:

- Raises unaided brand awareness up to 12% vs controls
- Positively shifts brand perceptions by 2% vs controls
- Educates people about a product/brand by 2% vs controls
- Drives intent to purchase by up to 3% vs controls

Source: https://www.iabuk.com/research/digital-advertising-effectiveness

OOH

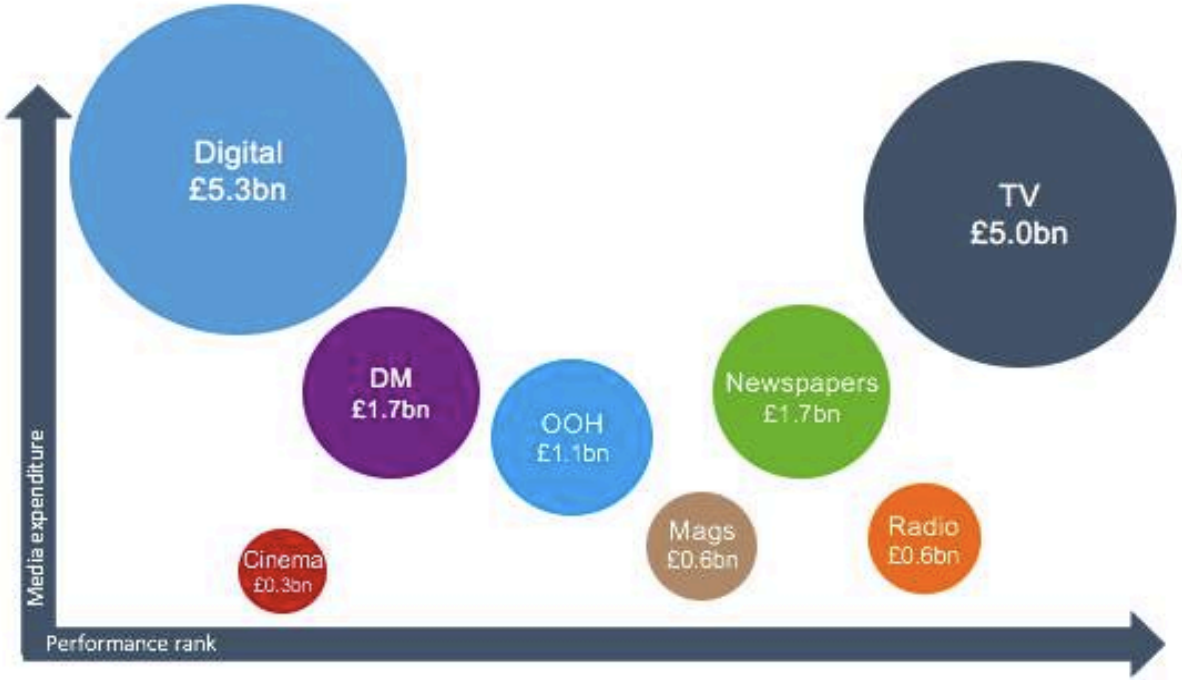
"83% of people recall seeing OOH advertising within the last 30 minutes before shopping"

(Outsmart, Last Window of Influence, 2011)

ADVERTISING STRATEGY

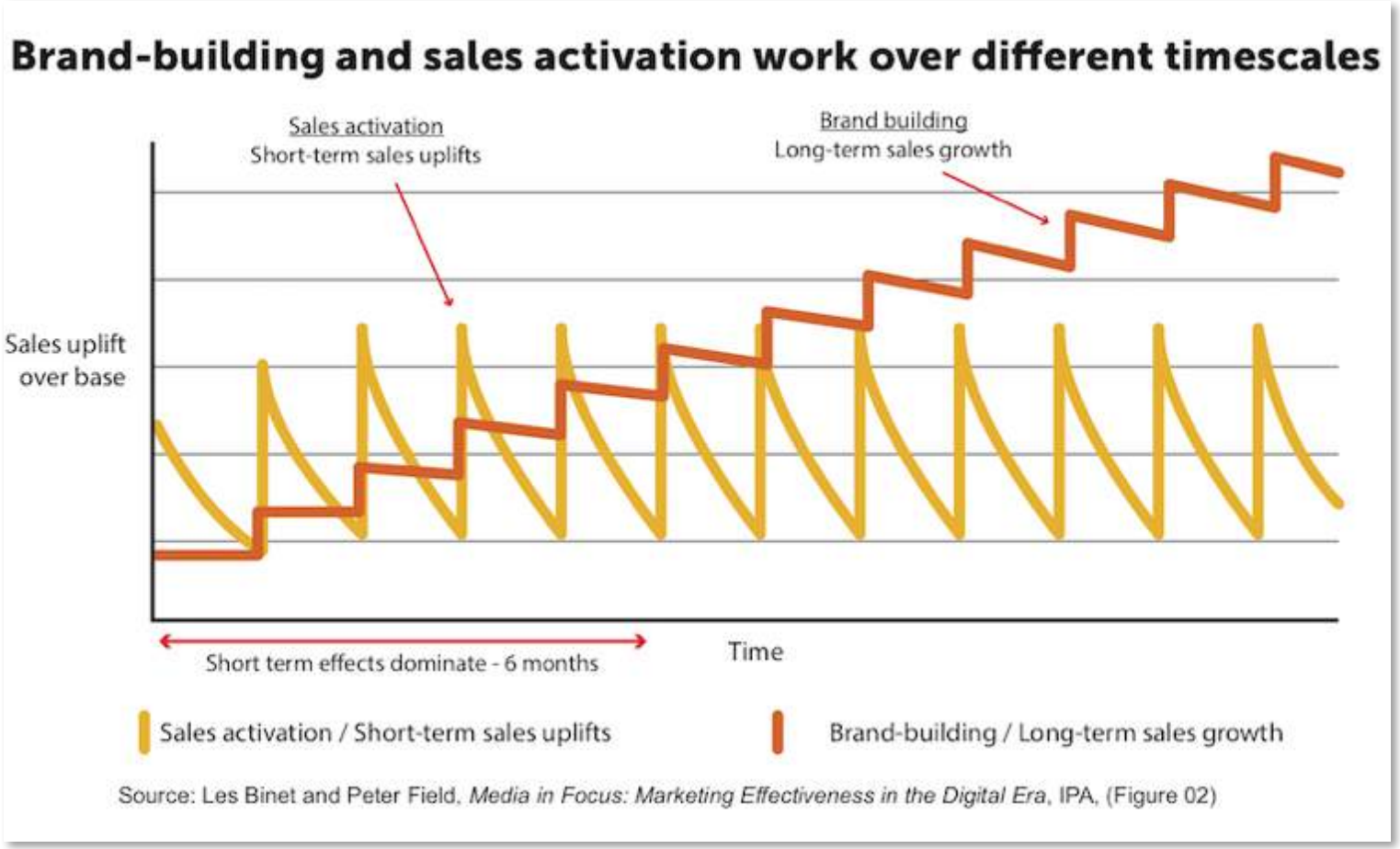
Consider radio more for brand-building campaigns

What the evidence says		
1	TV	107.1
2	Radio	103.2
3	Newspapers	87.8
4	Magazines	79.5
5	Out of home	71.7
6	Direct mail	67.0
7	Social media	65.8
8	Cinema	61.4
9	Online video	57.6
10	Online display	50.0



Source: https://www.radiocentre.org/re-evaluating-media-launches/

ADVERTISING STRATEGY



NEED FOR EVIDENCE BASED VIEW

What we find in this study, yet again, is a re-iteration of the importance of media that can deliver over the longer term. ... shows that newsbrands' ability to contribute to long term effectiveness is a key driver of success for brands.
We are being over-hyped and over-sold on a uniquely digital future. We need to get real and take a more evidence-based view of what really drives effectiveness.

Peter Field

CONSUMER PERSPECTIVE

74% OF EU CONSUMERS WOULD NOT CARE IF NON-MEANINGFUL BRAND DISAPPEARED

HAVAS GROUP 2017

BLURRING LINES

ALTERNATIVE FACTS
NATIVE ADVERTISING
FAKE NEWS
AI NEWS
HIJACKED NEWS

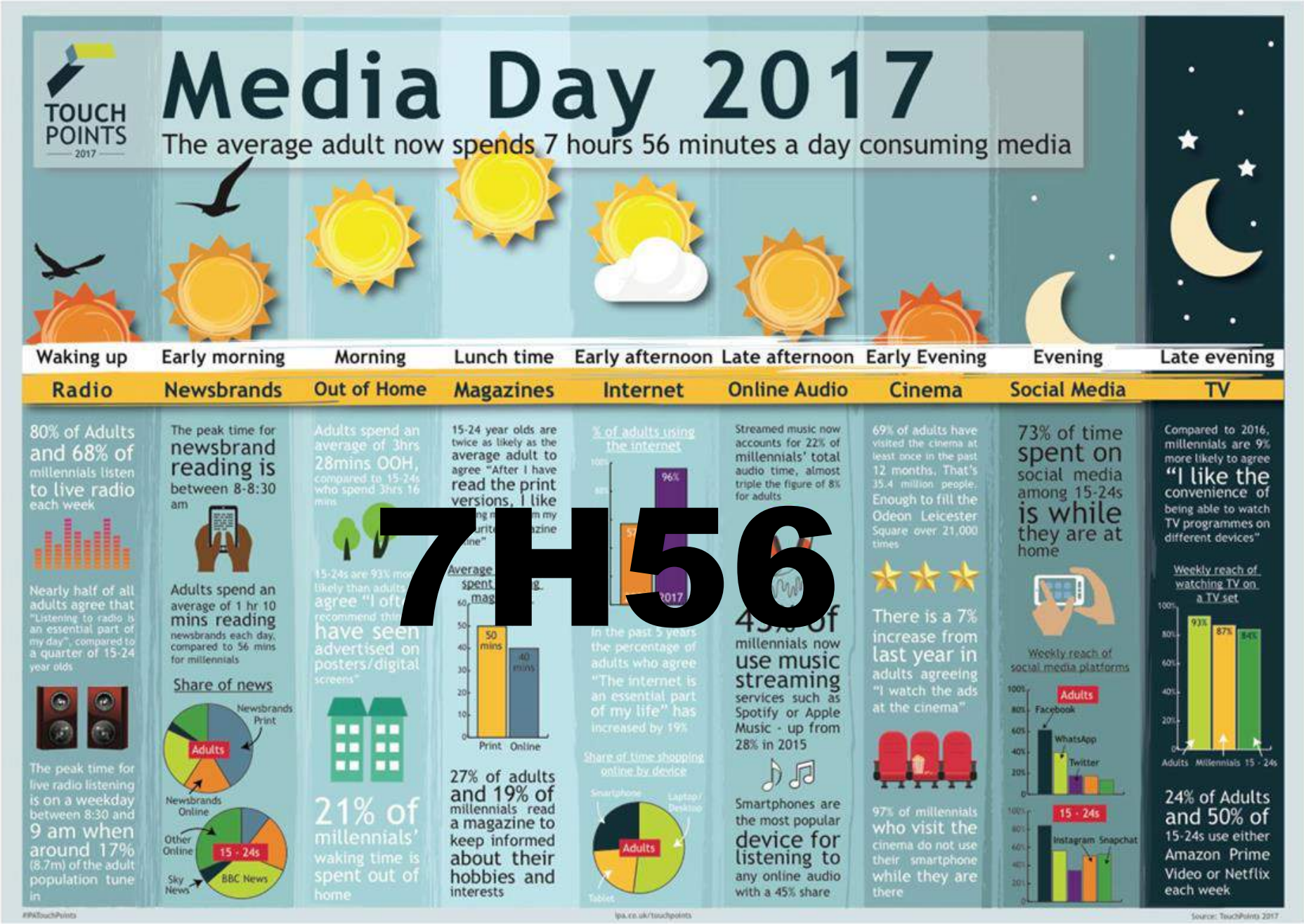
INFORMATION OVERLOAD

ATTENTION

150

The amount of times consumers on average check their phones every day for bursts of 30 sec

Source: https://www.printpower.eu/insight/the-power-of-print-in-numbers/



Source: https://ipa.co.uk/knowledge/documents/touchpoints-infographic-13-the-media-day-in-2017

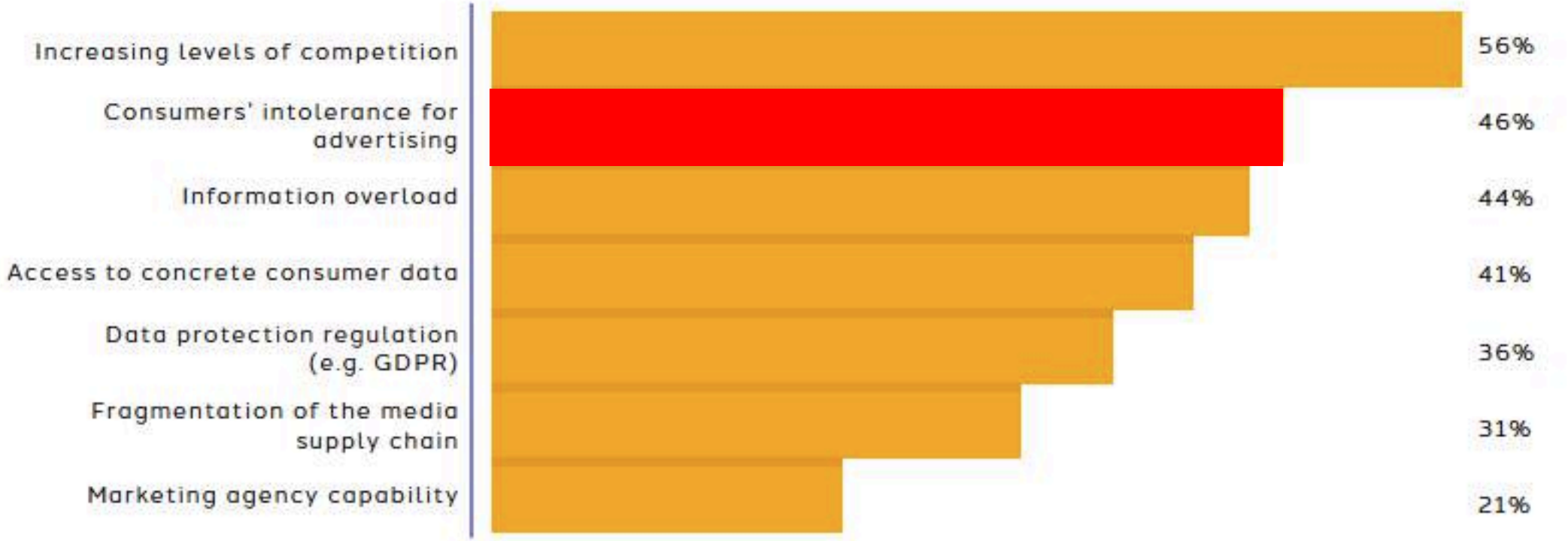
SWITCH OFF/ON

QUEST FOR ATTENTION

The wealth of information creates
a poverty of attention

Herb Simon

KEY BARRIERS FOR CONSUMER RELATIONSHIP



Source: Dentsu Aegis CMO Survey 2018

OTHER VARIABLES

Questions for agencies

How many people in media and advertising have 15+years experience ?

How many of them have a regular personal experience with newspapers, magazines or other print media ?

How many ad agencies have a full time print production manager ?

MENTAL WORLD

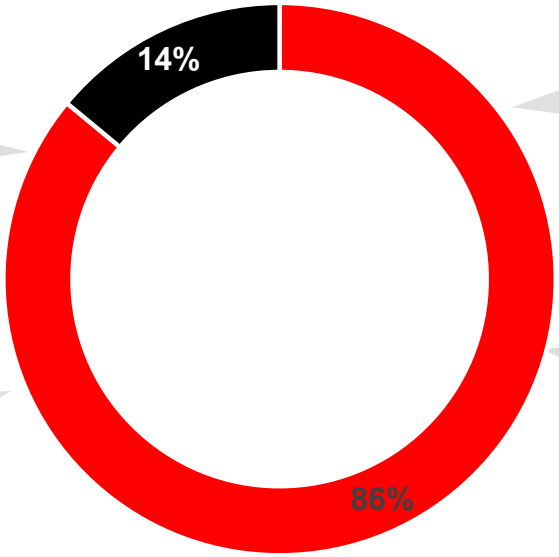
SIGNS OF A POTENTIAL CORRECTION

“That trend will slow down dramatically due to lack of transparency.”

Media agency

“…issues with ‘businesses marking its own homework’, and measurement provided by interested parties.”

Advertiser



“People are now waking up to the fact that it's not delivering what it says it is.”

Advertiser

“Questions are being asked with regards to safety, fraud and digital blocking, so I think it will decline somewhat.”

Advertiser

PRINT IS HERE TO STAY

Press may have its day again

...The small team that had worked on her section with her were made redundant or reassigned and she spent the next 12 months single-handedly writing stories about her beat for the paper's website. A year on and the newspaper's slowly declining advertising revenue from brands in her sector had stopped declining and pretty much disappeared.

Like all good specialist journalists, my friend knew many of the marketers whose brands used to advertise around her content. So she asked them why they weren't spending with the newspaper any more; she was still writing about their industry, just for an online audience only.

It turned out that their media strategies weren't finessed to contextually advertise around specialist content online; when the paper could no longer offer a compelling cross-platform audience, it simply dropped off their media schedules.

Also the marketers she spoke to said they had struggled to find any of my friend's articles about their industry on her paper's website and they no longer felt that her paper was a place quality readers would come for quality content about their sector.

And, damnit, they missed reading about themselves in print. They missed the stature and standout that had been conferred on their industry when it had been written about in a dedicated section of a carefully curated newspaper, where only the most important or

By Claire Beale
Global editor-in-chief

interesting articles made it into the limited number of printed pages.

In the end, my friend was poached by a rival newspaper that wanted to enhance its coverage of her sector. There she edits a section in the printed paper, oversees a digital hub and has launched a quarterly supplement.

The company she works for believes that print still has a healthy role to play in driving its revenues and also in protecting the stature of the newspaper's own brand; to publish content in print can be a valuable kitemark if few of your rivals do.

New figures just out from the Advertising Association suggest advertisers may be starting to agree again. For the first time in seven years, print display ad revenue grew in the first quarter of this year. Growth! And not just growth in national newspapers' digital revenue, though that was up 20% last year, but growth in print.

It's a small but significant boost for trusted, curated quality content when the narrative for so long has been decline and decay for traditional formats and established media brands. Radio (with adspend up 12.5% in the first quarter of 2018 versus 2017), out-of-home (up 5.3%) and TV (up 6%) also look strong.

Of course, online continues to outperform in terms of adspend, particularly in search and social media – but in the context of the recent tremors at Facebook and Twitter, the resurgence of established media is notable.

The frustrating thing is that while the news brands that have continued to invest in their print product are starting to benefit from the upswing in print ad revenues, creative agencies seem to have lost the craft skills required to maximise the opportunity.

At this year's Cannes Lions festival, the UK only clocked up one – ONE! – shortlisted entry in the Print and Publishing category: Mother's "Fck" apology ad for KFC. It was a dismal reminder that agencies have also bought the story about print's demise and have forgotten how to create simple, powerful press ads, maybe even with some beautiful accompanying copywriting.

Print offers a quality environment and the impact that comes from a limited, curated number of pages. It's time agencies committed to the craft of print advertising once again. • @clairebeale

Print offers a quality environment and the impact that comes from a limited, curated number of pages. It‘s time agencies commited to the craft of print advertising once again

Campaign, Claire Beale

HOW TO CONVINCE

OVERALL PERFORMANCE RANKING MEDIA

Discrepancy between evidence and perception

What the evidence says

1	TV	**107.1**
2	Radio	**103.2**
3	**Newspapers**	**87.8**
4	**Magazines**	**79.5**
5	Out of home	71.7
6	**Direct mail**	67.0
7	Social media	65.8
8	Cinema	61.4
9	Online video	57.6
10	Online display	50.0

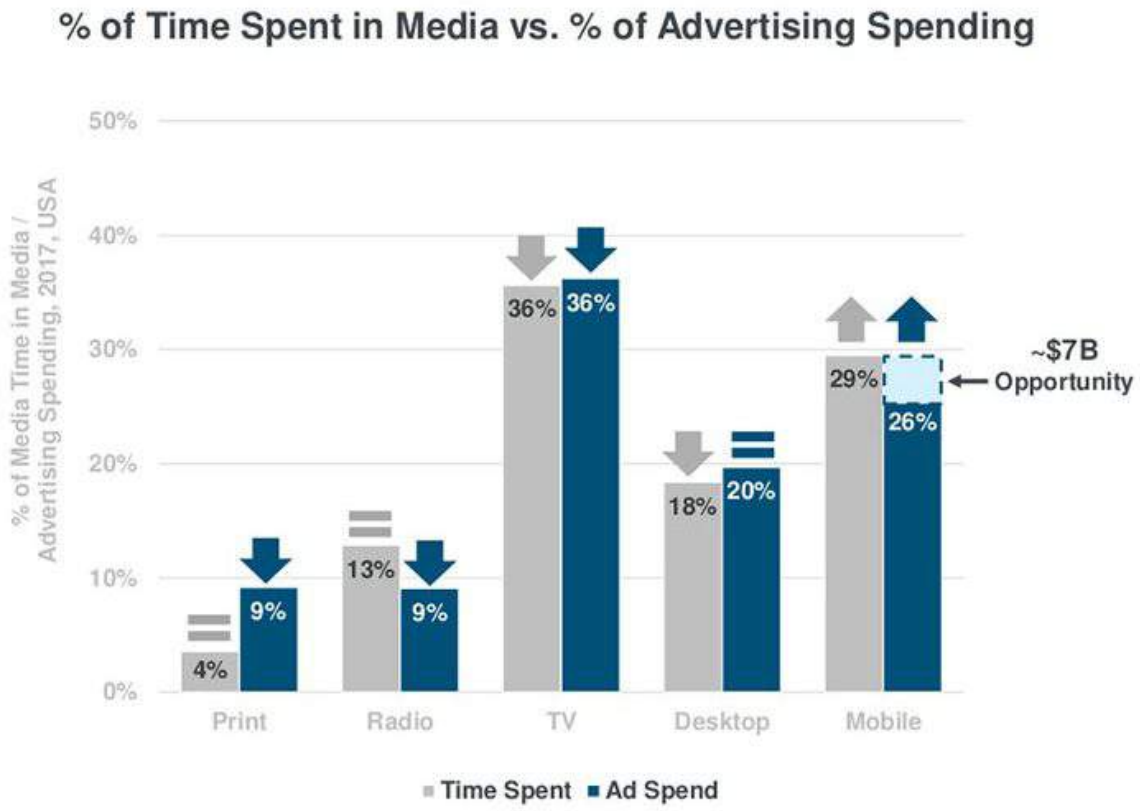
What advertisers and agencies say

1	TV	**48.9**
2	Online video	41.6
3	Social media	41.3
4	Out of home	39.6
5	Cinema	39.1
6	Radio	**38.9**
7=	**Newspapers**	**36.3**
7=	**Direct mail**	36.3
9	Online display	35.5
10	**Magazines**	**35.1**

Source: https://www.radiocentre.org/re-evaluating-media-launches/

NOT ALL ADVERTISING IS CREATED EQUAL

Advertising $ =
Shift to Usage (Mobile) Continues



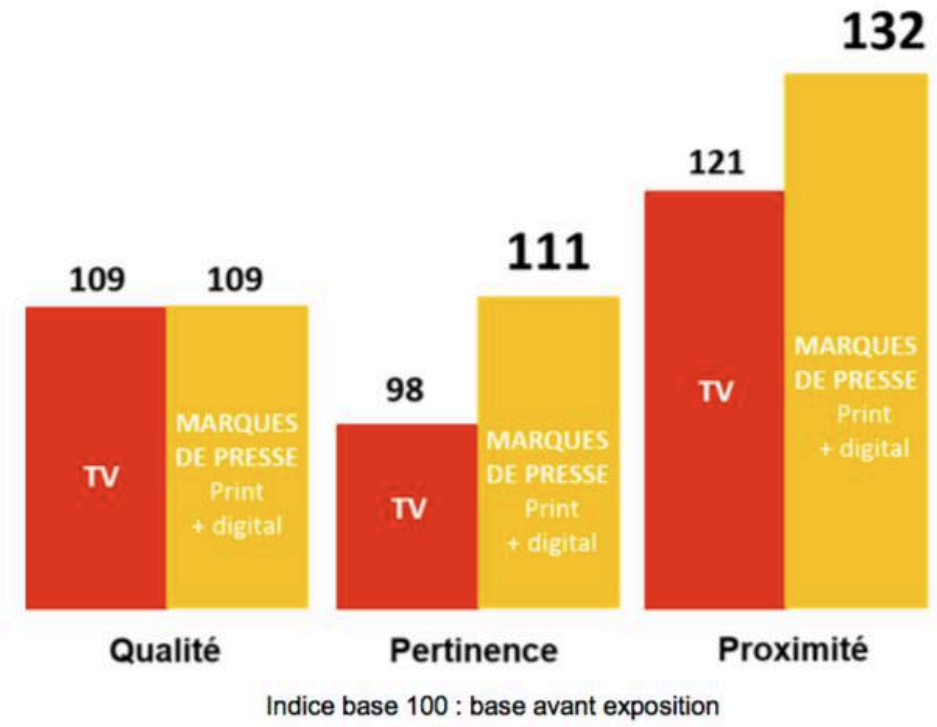
KLEINER PERKINS
2018
INTERNET TRENDS

Source: Internet and Mobile advertising spend based on IAB and PwC data for full year 2017. Print advertising spend based on Magna Global estimates for full year 2017. Print includes newspaper and magazine. ~$7B opportunity calculated assuming Mobile (IAB) ad spend share equal its respective time spent share. Time spent share data based on eMarketer (9/17). Arrows denote Y/Y shift in percent share. Excludes out-of-home, video game & cinema advertising.

96

MULTI-PUBLISHER EVIDENCE

- **Food Brand Trust research**



MULTI-PUBLISHER EVIDENCE

- **More evidence needed to promote the use of print among brands and agencies**
- **Best to have multi-publishers' surveys covering most of the titles**
- **Demonstrate the value of print media in the mix**

Examples show:

- The unique value of attention
- Value of integrating print in the mix
- Profitability of obtaining the ideal mix with print

ATTENTION

ATTENTION

81%

Of the time we spend reading our newspaper is with solus attention for newspapers

Source: https://www.printpower.eu/insight/the-power-of-print-in-numbers/

TIME READING ADVERTS

75,35 sec

Average time/day spend with reading ads in Press vs 1,24 sec for digital

Source: https://www.printpower.eu/insight/the-power-of-print-in-numbers/

Ukonwa Ojo, Coty

CMO of the Cons

CMO of Covergirl and Sally Hansen

Marc S. Pritchard, Procter & Gamble

Chief Brand Officer

Raja Rajamannar, Mastercard

Chief Marketing & Communications Officer

and President – Healthcare Business

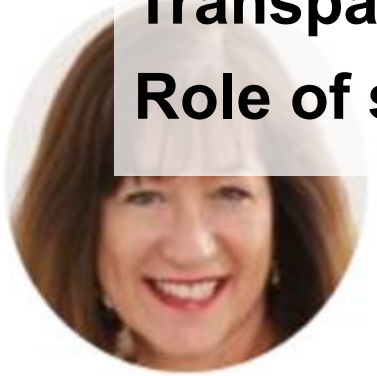
Questions:

New & shiny vs evidence- based

Measuring ROI & ROMI

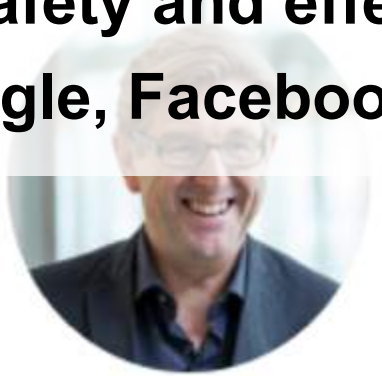
Transparency, brand safety and effective online media

Role of sales staff Google, Facebook and now also Amazon



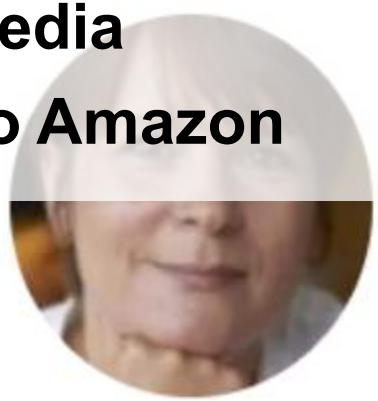
Syl Saller, Diageo

Chief Marketing and Innovation Officer



Keith Weed, Unilever

Chief Marketing & Communications Officer

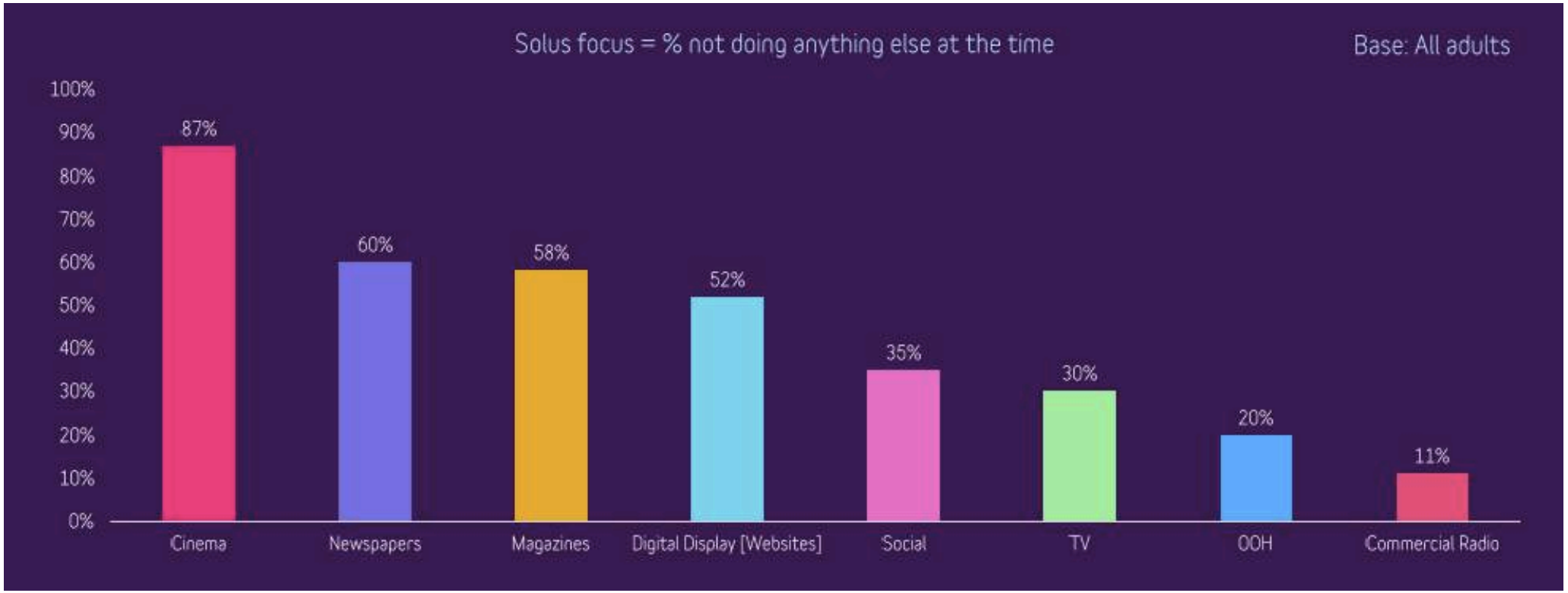


Claudia Willvonseder, IKEA

CMO/Global Marketing and Communi

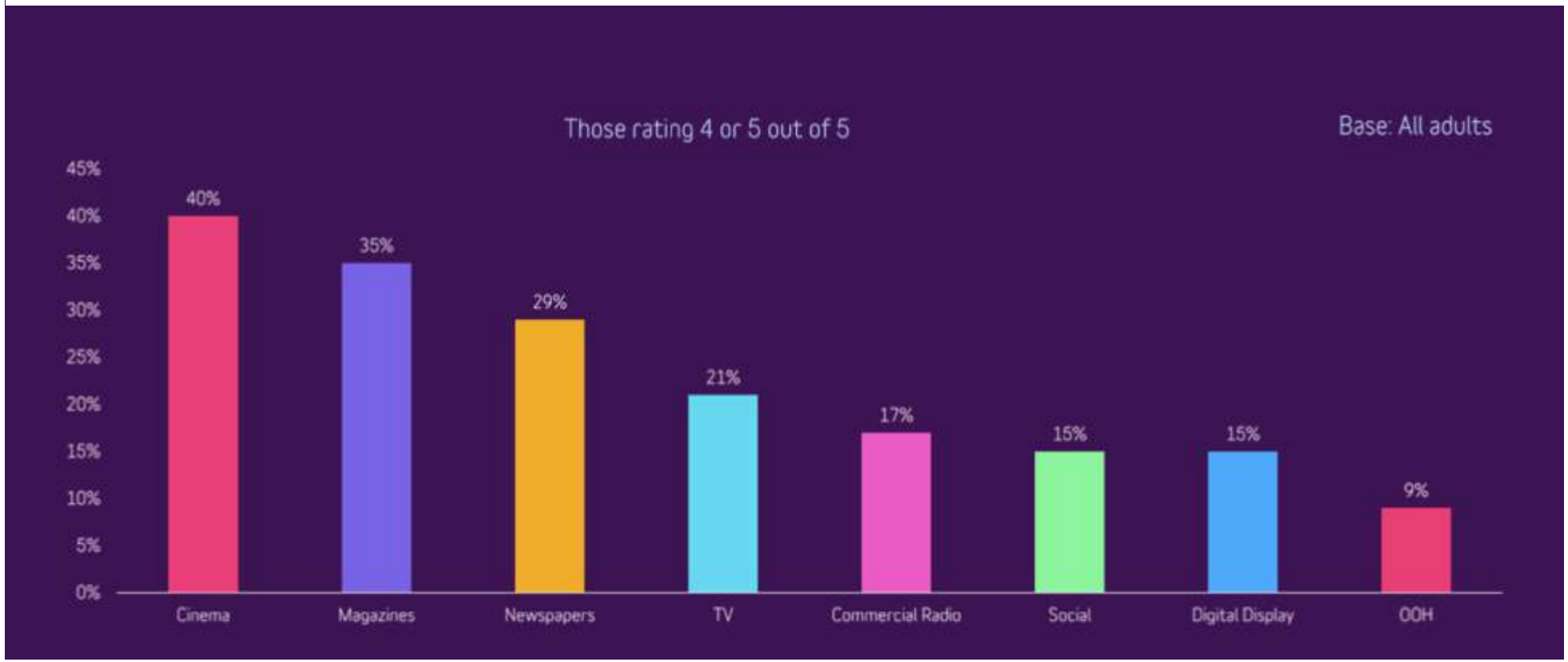
Manager

ATTENTION – CHANNEL FOCUS



Source:https://www.radiocentre.org/re-evaluating-media-launches/

ATTENTION – ADVERTISING FOCUS



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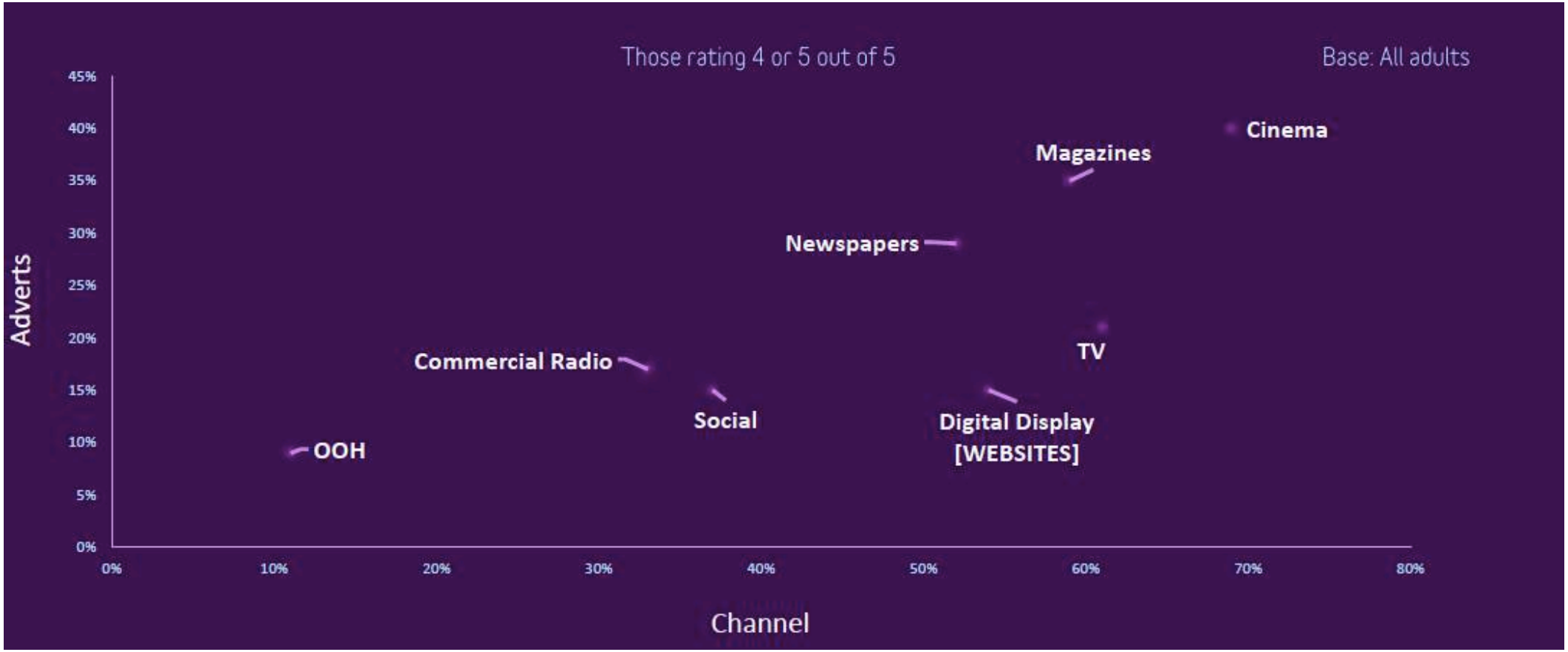
ATTENTION – CHANNEL AND ADVERTISING



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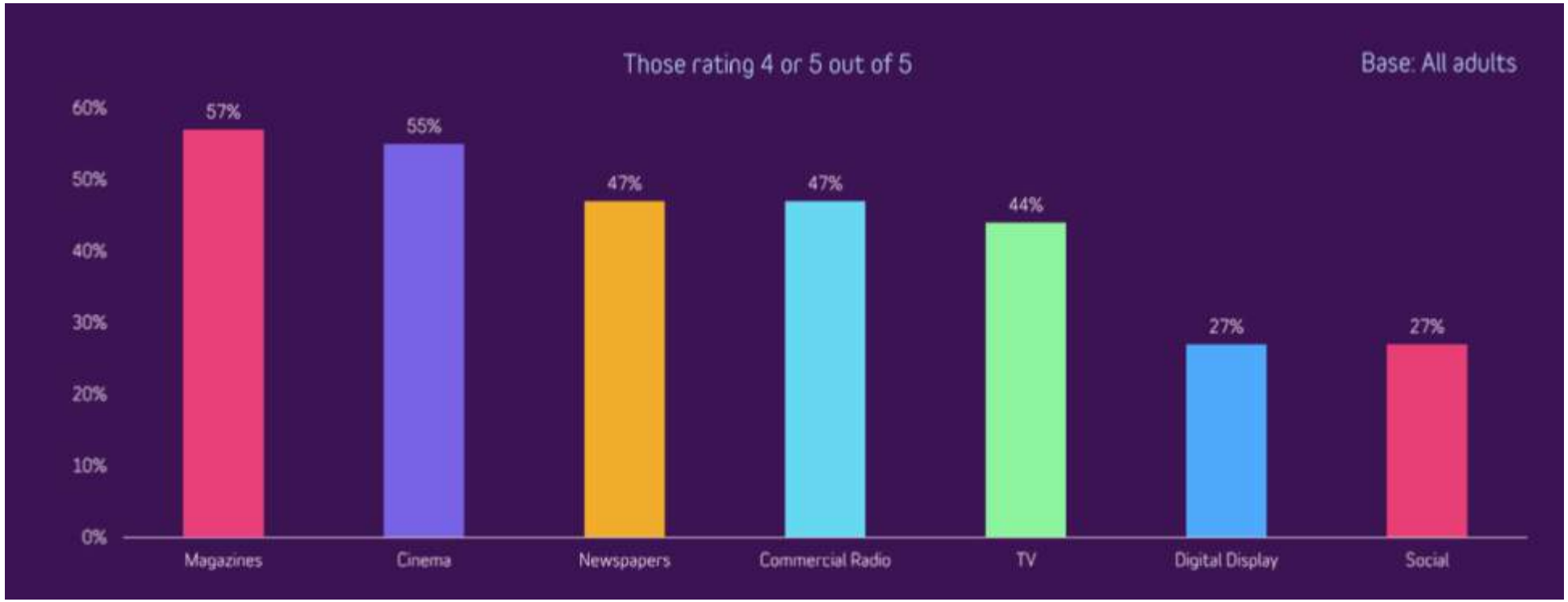
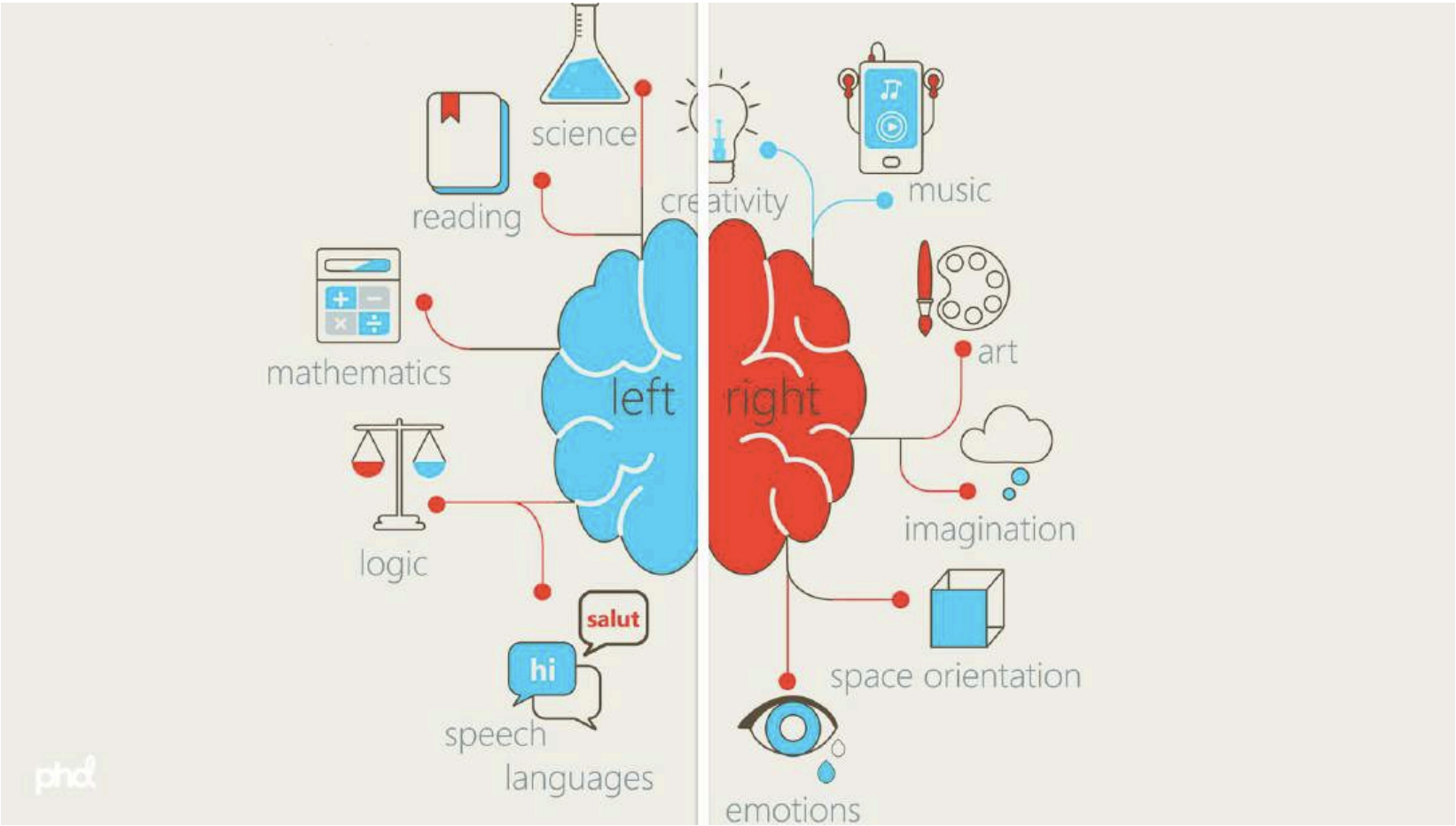
ADVERTISING PART OF CHANNEL EXPERIENCE



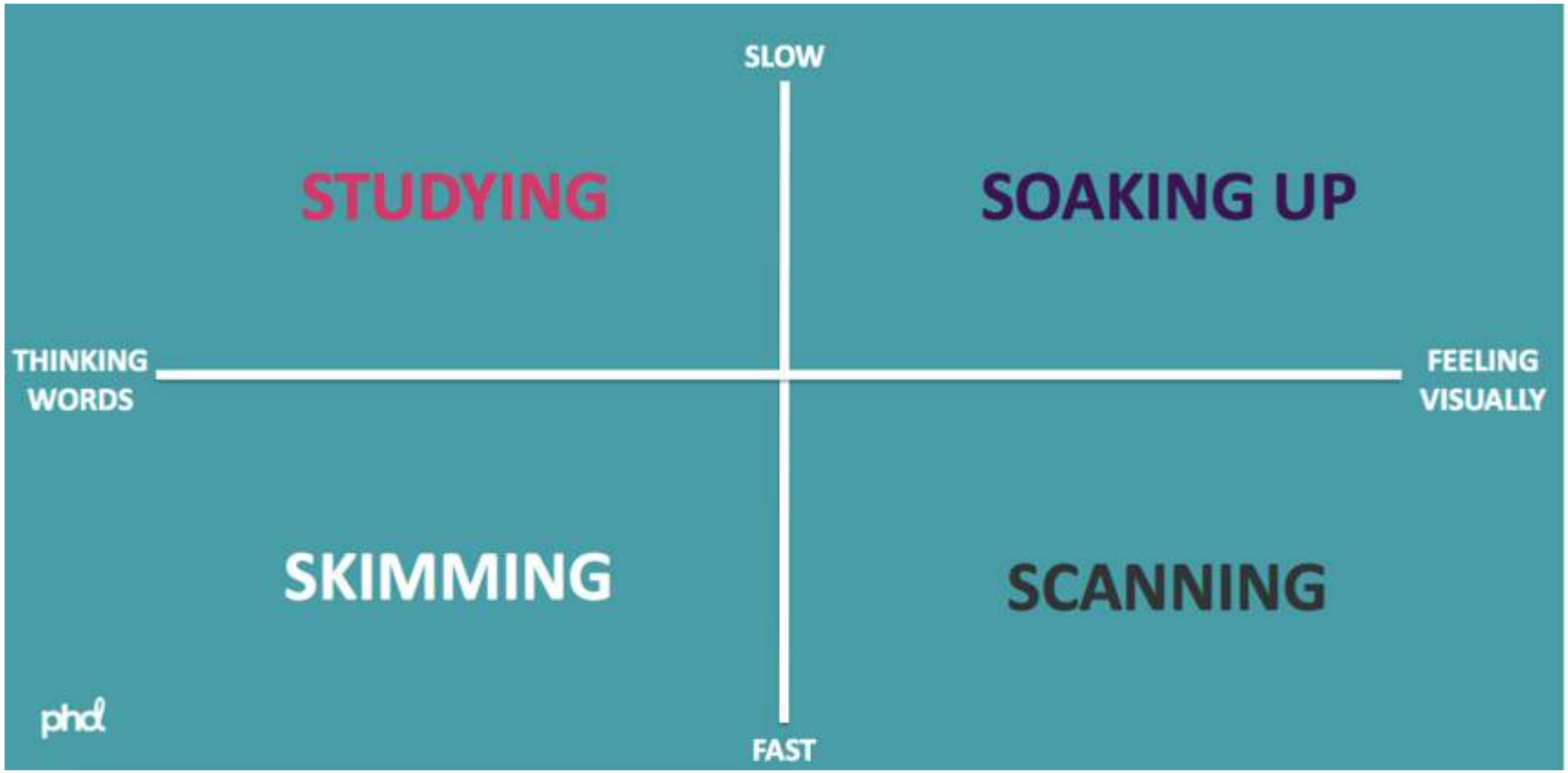
Source: https://www.radiocentre.org/re-evaluating-media-launches/

ATTENTION – LEFT AND RIGHT BRAIN



Source:https://darkroom.magnetic.media/original/b6ad7d94595b94d54d632492d9ee7fbd:b2459c6448949c44b85476462b320d63/attention-please-the-whitepaper.pdf

ATTENTION - PROCESSING



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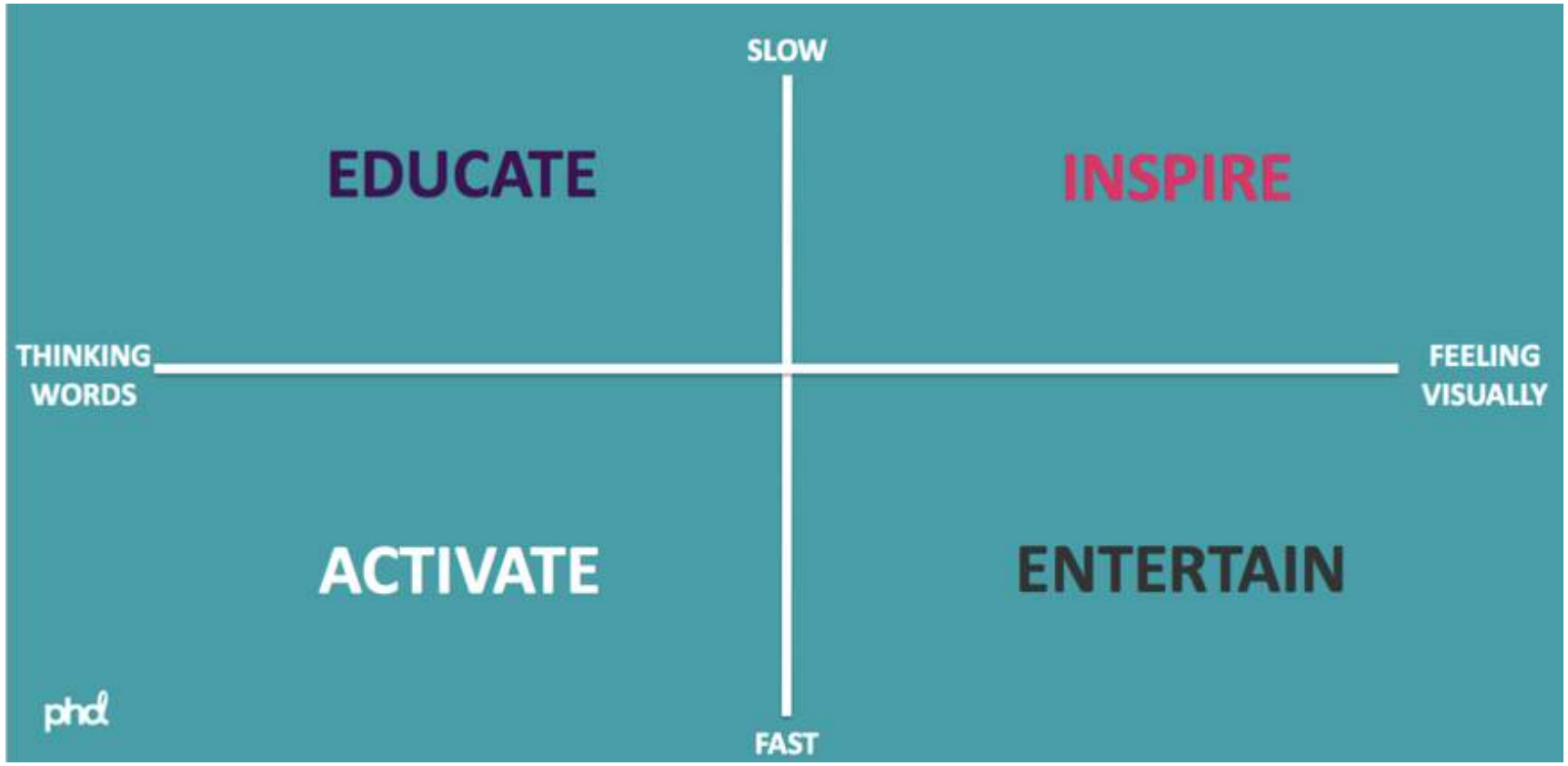
ATTENTION - ROLES



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ATTENTION – TYPES OF CONTENT

Source:magnetic.media/original/b6ad7d94595b94d54d632492d9ee7fbd:b2459c6448949c44b85476462b320d63/attention-please-the-whitepaper.pdf

INTEGRATION

THE HOLY GRAIL: THE IDEAL MIX

INTEGRATE PRINT IN THE MIX

67%

More effective to deliver new clients when print is include in the mix

90%

Of campaigns that included door drops reported rise in acquisition vs 59% for those without door drops

Source: https://www.printpower.eu/insight/the-power-of-print-in-numbers/

INTEGRATE PRINT IN THE MIX

570%

Increase of campaign ROI for Finance when newspapers were included

280%

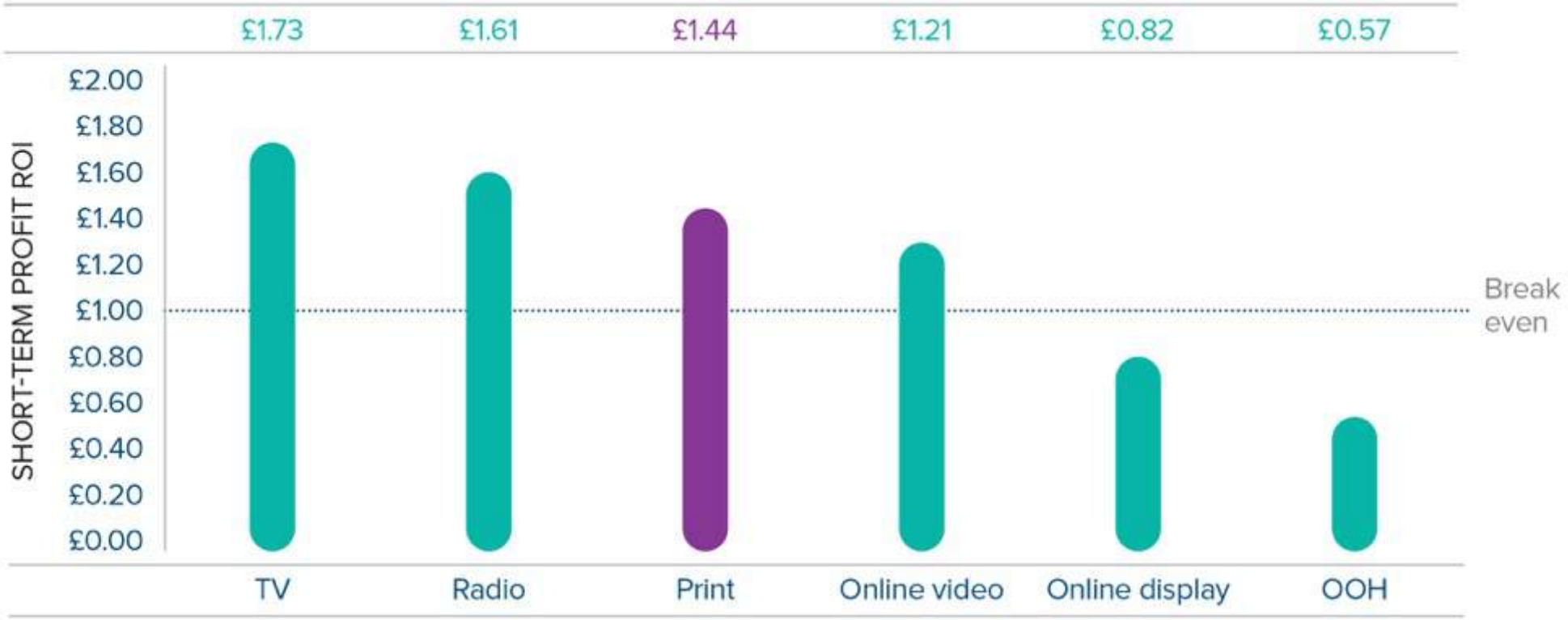
Increase of campaign ROI for Retail when newspapers were included

70%

Increase of campaign ROI for Automotive when newspapers were included

Source: https://www.printpower.eu/insight/the-power-of-print-in-numbers/

INTEGRATE PRINT IN THE MIX



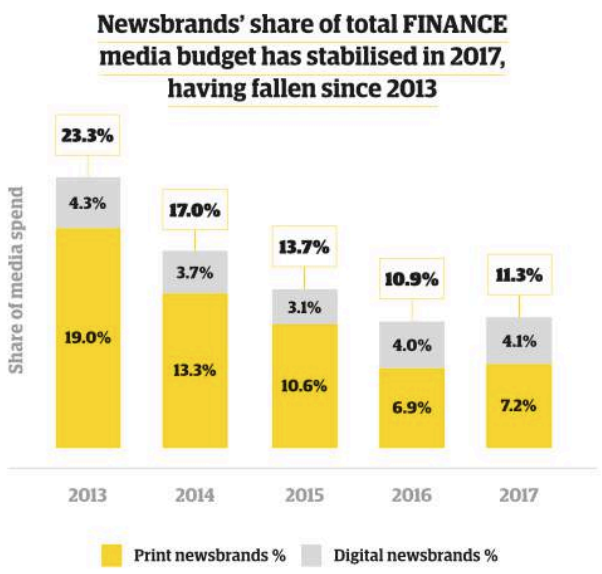
Source: https://www.radiocentre.org/re-evaluating-media-launches/

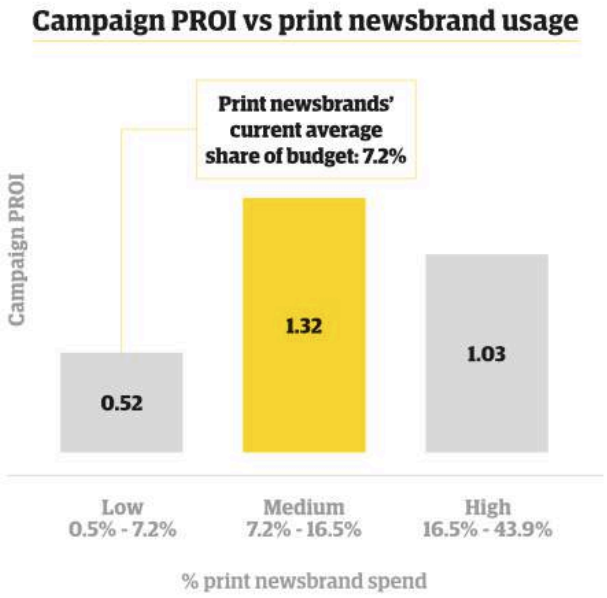
PROFITABILITY

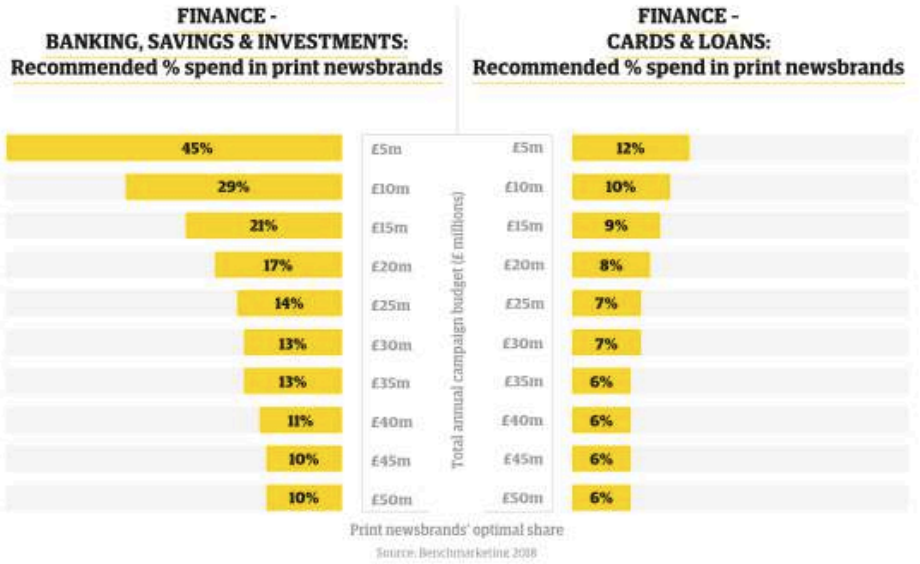
MULTI-PUBLISHER EVIDENCE

- Meta-analysis of IPA cases
- Optimising the newspapers' share of the mix
- Based upon Profit Return on Investment
- Nine product categories

INCREASE CAMPAIGN PROFITABILITY – THE FINANCIAL SECTOR

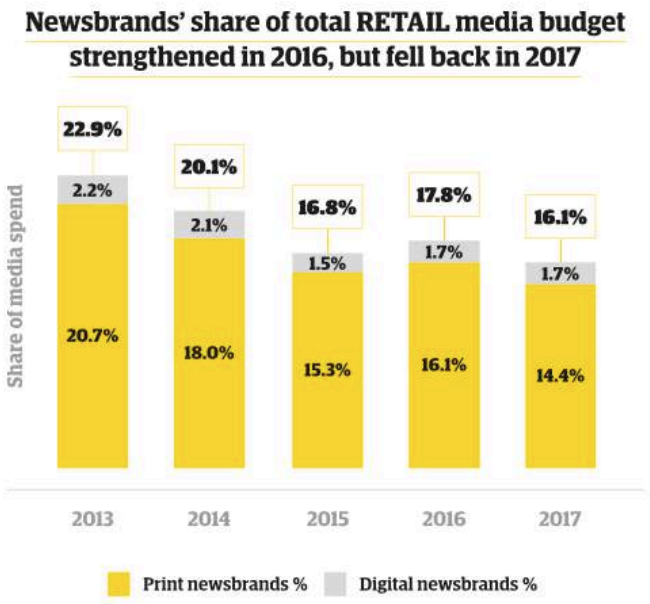


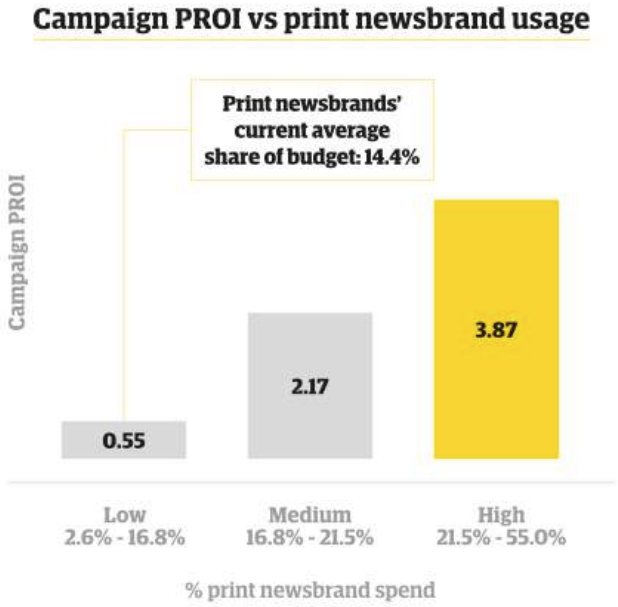


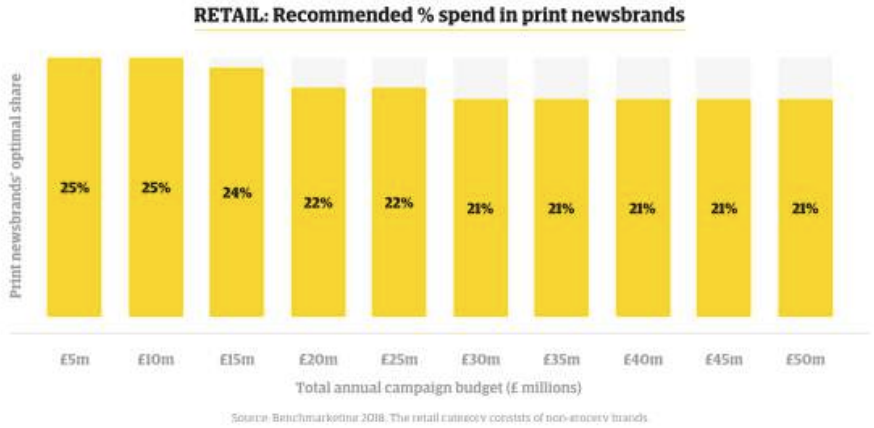


Source: https://effectiveness.newsworks.org.uk

INCREASE CAMPAIGN PROFITABILITY – THE RETAIL SECTOR







Source: https://effectiveness.newsworks.org.uk

WHAT CAN WE SUPPORT EACH OTHER

- Cross-border advice, contacts and presence
- Free use of all the content online and offline
- Share content on our platforms (website, newsletters, Twitter, LinkedIn)
- Share innovative initiatives
- Support us in approaching agencies and brands
- Research initiatives

THANK YOU
FOR YOUR ATTENTION

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