

IS THERE A CYBORG FUTURE FOR PRINT IN TODAY'S PROGRAMMATIC BIG DATA ECOSYSTEM?

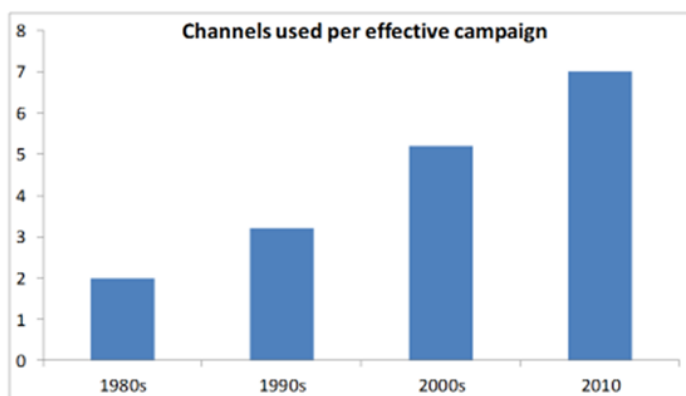
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1 THE THIRD DIGITAL WAVE – THE BACKGROUND

In the “third digital wave” paper from 2015 we showed how print still had a valid proposition since the combination of media is always more powerful than the creation of mono digital campaigns. Both in terms of reaching audience and the in-market effects of a campaign. Evidence from Les Binet and Peter Fields analysis of the IPD database is quite clear and convincing regarding the latter; effective campaigns in 2010 used 3 times more channels compared to 20-30 years ago. There is no indication that the trend has turned. Most likely, the trend has continued further as we have seen that the number of communication channels has grown immensely. Multi trumps mono, period.

Figure 1. Number of channels used per effective campaign



Source: Binet, Les and Field, Peter: “Marketing in the area of accountability”, WARC, IPA 2007/2010

We discussed the three waves of digital advertising and showed how multimedia planning can help balance digital campaigns. Awareness of adblocking and viewability had just started to raise, so we had accounted that in by using media weights in our examples.

The three waves were described in the following way:

- *In the first wave of digital advertising – advertisers tried digital advertising.*
- *In the second wave they complemented legacy media with digital advertising*
- *In the third wave advertisers abandoned print (legacy media) media for new shiny digital toys.*

We concluded that in the aftermath of the third wave researchers observed advertising campaigns washed up on the rocky shores on the island of “under achieving advertising”. There were a number of reasons presented on why the digital proposition was unrealistic and why it needed to be balanced by the use of legacy media. We reached a number of conclusions that could be used practically by planners and media houses:

- *A Digital segmentation model can be a good help to assist planners in the budget allocation mix between digital and legacy media. It can also help planner balance ‘unbalanced’ media plans.*
- *Print (in combination with digital) is still cost efficient and important to reach a wider part of the target market and not only the digital natives. Advertisers simply cannot expect to reach mass markets completely using only digital media.*
- *Print in combination with digital can significantly increase the net reach of campaigns. Print publisher absolutely need to get their cross media offer flying. This can help them to at last find a survivable business model.*
- *Print publisher need to continue to push its digital content towards premium.*
- *Reaching low digital users by adding more digital media spend is inefficient and expensive. Reaching low print readers by adding more print to the campaign is equally stupid.*

- *Media weight must be used to equate currencies and to give advertisers a balanced view on what is achievable for a given budget.*
- *If media weights are not used the advertisers expectations on the result of the campaign will be highly unrealistic and this will possibly have a negative impact on the media brands themselves.*
- *Print has a unique opportunity to use the timing of the exposures to better help advertiser find the right contextual environment for their advertising*
- *The right research and planning software can help advertisers reach further into their communication and it can also if used correctly help print to surf and not to drown in the third digital wave.*

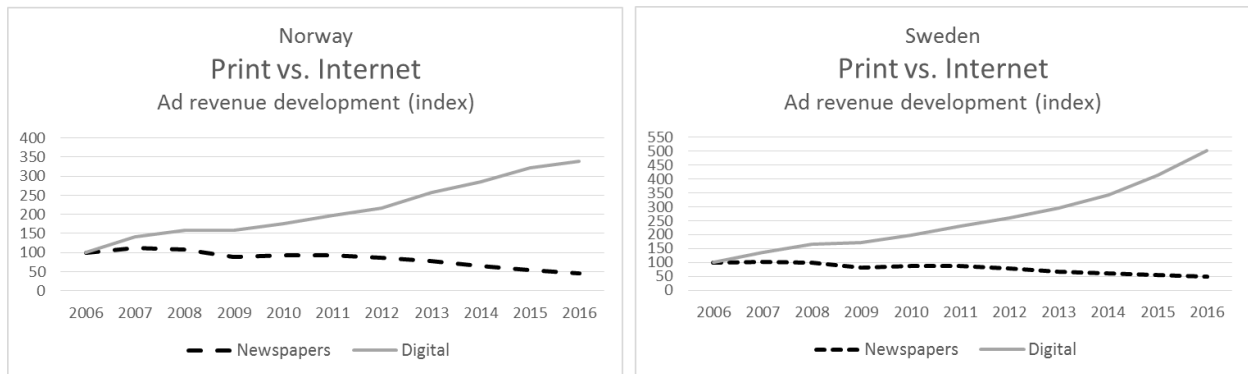
This brings us to the fourth wave of digital advertising.

2 THE FOURTH DIGITAL PROGRAMMATIC WAVE AND THE DOWNWARD SPIRAL

Even though it seemed as print and legacy media had something of a revival after the third digital wave it soon became obvious that the revival was more of a lip service character.

At the end of the day when dollars were counted it was obvious that the downward spiral for print just continued.

Figure 2. Print vs. Internet ad revenue development (Source: IRM)



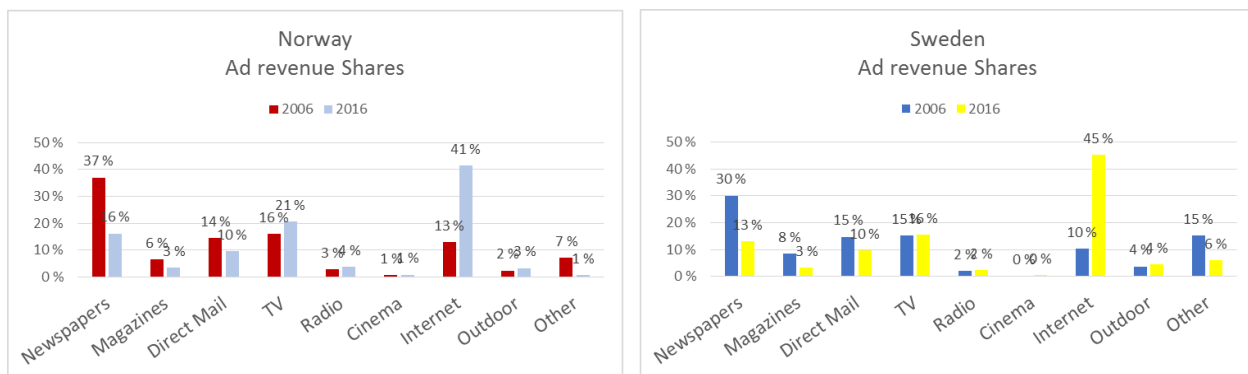
In 2015 we believed that the fourth wave of digital advertising really would be a digital + analogue wave – given that all research and common sense pointed in that direction.

In reality, the fourth wave of digital advertising came to be what is now known as “the fourth wave of digital programmatic”. In retrospect, it seems as print was not really prepared to fully exploit the fourth programmatic wave. We believe they could have been better off if they had a more holistic view upon the full media house. In their 2013 PDR paper “3X new – a new era for magazine research in Norway”, Broady, Futsæter, Sandvik & Østnes, proposed a new way of thinking holistically when it comes to pricing and selling print and online ads. But in true fashion, publishers did not even dare to try to put it in use.

In the “third digital wave” paper from 2015 we showed how print still has a valid proposition since the combination of media is always more powerful than the creation of mono digital campaign. You might have thought this was going to put print back on the surfboard again. Not so really. It really does not matter if the media - as in the fourth wave - is handled in two different contexts (programmatic vs traditional media planning).

So despite the ever-clear evidence of what works and what's not, the truth of the matter is that print advertising have continued to lose its shares of advertising budgets.

Figure 3. Ad revenue shares (Source: IRM)



The publishers were in a deadlock situation as they themselves had lost focus and interest in print for many years. The print shares of advertising budgets were still declining and the revenue streams of digital were not making up for it. Moreover, and even worse, the publisher's digital growth have not measured up against the digital growth in total.

Figure 4. Publisher digital vs. digital total revenues (index)(Source: IRM)

YEAR:	NORWAY		SWEDEN	
	Publisher digital	Digital total*	Publisher digital	Digital total*
2014	100	100	100	100
2015	120	113	117	120
2016	102	119	128	146

* "Digital total" includes "Publisher digital"

The irony is that prints total brand reach has increased over time but has not been able to monetize the development. Even worse is that almost all digital incremental revenue seem to move in the direction of AGFA (Apple/Google/Facebook)

Mark Ritson summarizes it rather elegantly in Marketing week where he comments on a 2017 WFA survey amongst 50 top spending advertisers

"75% of marketers aren't convinced of the effectiveness of digital yet 66% will invest more next year. Pause, consider this data, and gulp.

These empirical results are as illogical as they are consistent. Most marketers will continue to switch more and more of their budget to digital marketing and away from so-called traditional channels. They will do that not because traditional media is losing share or engagement or because digital media metrics actually make sense or impress anyone. They will do it, quite simply, because it is in their nature to favour the new over the old. The digital over the traditional."

However, even if digital are perceived as having boarded a runaway victory train heading for the end station of "Direct Responsia" – we once again see dark clouds building up on the horizon. The question is if these clouds have the silver lining print needs to be able to ride the fifth wave of digital advertising.

So let us recap what has been happening in the wider world of advertising before we return to the consequences we believe this will have on the print industry.

3 STATE OF THE ADVERTISING NATION

The irony of today's advertising community is that we at break neck speed are moving in two different directions:

On the one hand:

- A technocratic route where the key words are digitalization, automatization, programmatic, big data, one to one, real time, optimization, machine learning, the promise of relevance, activation, direct response etc.

On the other hand:

- The call for a return to the core marketing principles and brand building, and traditional media metrics.

The Brand Builders support the notion that we have taken direct response and activation of the most valuable customers to far. As an example:

Binet & Fields has concluded from their IPA research that advertising nowadays is less efficient today than it has ever been before. Short termism, digitalization, focus on ROMI instead of ROI, programmatic advertising and the focus on activation are seen as the culprits.

Further they concluded from their analysis that Campaigns with an activation objective rose from 47 per cent (prior to the global financial crisis) and that the figure now In 2016 reached 72 per cent. A significant and huge shift in paradigm.

Their report further showed that the optimum balance of brand and activation expenditure remains at around 60:40 with evidence that deviation to either side of this point results in a decline in long-term effectiveness.

4 CRITICISM OF THE NEW FOURTH WAVE OF DIGITAL PROGRAMMATIC

In our 2015 PDRF paper we barely touched upon the beginning awareness of fraud, viewability and adblockers. Even though we accounted for adblockers and viewability when calculating different outcomes of digital and combined print + digital campaigns. However, in 2015 – this was just ripples on the surface. What we were in for was something bigger, a bigger wave, more like a tsunami that would hit the digital advertising debate with a bang.

As the challenges of digital have become more and more evident, the advertisers finally broke their silence. Not only did they question the aforementioned points about fraud, ad blocking and viewability – they in fact questioned the whole ecosystem that had been built to fuel precisely targeted and effective digital advertising. Programmatic and media agencies in one corner, advertisers in the other.

The Criticism and the disappointments of the fourth wave has been nothing less than plentiful and we will briefly exemplify these by quotations that seem to be representative of the critique (and if you do not wish to read the text – the comic strip should summarize it):



Source: *The Marketoologist*

- **Lack of transparency**

There are many examples of what advertisers and media houses has found to be lacking in transparency. This range from the critique Facebook has met after delivering overestimated metrics on a number of KPI's. The latest issue to emerge in the Nordics would be that Facebooks actually has been so successful that they reach more young people than there actually are according to census data. This has most recently proved to be the case in other markets like US, UK, Canada and Australia as well (Marketing Week/WARC).

But also the Guardians fury when they sued Rubicon for what they thought was extra charges taken from advertisers when buying Programmatic or by all means the experiment the Guardian made when they tried to buy its own programmatic inventory and found that in some cases as little as 30 % actually reached the Guardian. This is in line with other studies from ANA and WFA – showing worst cases of as little as 10% coming through to media. The leakage of money in the value chain is referred to as the advertising waterfall.

"There's leakage. The money that goes in is not the same as the money that goes out. There are so many different players taking a little cut here, a little cut there - and sometimes a very big cut. A lot of the money that [advertisers] think they are giving to premium publishers is not actually getting to us."

Guardian's chief revenue officer Hamish Nicklin,

P & G also flexed their muscle in the debate.

"a media supply chain that is murky at best and fraudulent at worst - it's this media supply chain that programmatic is magnifying". Marc Pritchard, P&G's chief brand officer.

Transparency, or lack thereof, is also closely linked to the area of comparability. If you cannot compare results, it will pretty much remind us of Stephen Kings "The Mist"...

Mark Ritson describes in Marketing Week how Marc Pritchard, P&G's chief brand officer earlier this year "bemoaned the amount of time his marketing teams must spend trying to decipher between the various digital platforms

and their special, unique metrics. He compared the situation to trying to administer a football contest in which each team had its own rulebook, measures and conception of what a goal consisted of. Chaos in other words"

The Transparency issue is also closely linked to bad data (or at least not transparent data). In the new world of the fourth wave there is a fierce competition between different data providers; who has the best cookie pool and who have the best target groups available?

The truth of the matter is that in the programmatic commercial space it is very hard for advertisers to distinguish between high and low quality data.

It is like walking in to a grocery store, which sells 10 different cans of ham and on the outside all the cans look the same even though some are 100 % ham and some are 10 %. This is of obvious reasons not good for the future of the advertising industry.

"You have to have quality information, that's critical. This big data issue causes another anxiety, anxiety about the quantity of information, it overtakes the basic principles of good information, which comes from good research". Ricardo Esturaro, TV Globo, Brazil – Kantar Media Dimension Global Leader Survey

"What tells me whether what I buy has good data quality? I repeat: third-party tools". Erik-Marie Bion, AOL Advertising, France – Kantar Media Dimension Global Leader Survey

- **Short termism**

Short termism has been perceived as one of the greatest threats to brand building. When Sir Martin Sorrell's say that his greatest worry, and what he believes will have the greatest negative impact on future growth is short-termism. This short termism in business as a whole drives the focus on short termism in the marketing and advertising world.

Ben Foulkes of Conversant summarizes the fourth wave's programmatic offers problem with short termism in the following way.

"At its core, most programmatic marketers will claim it helps to increase efficiency against KPIs – reach and engagement, or performance goals like attributed sales, for example. The problem is that this is not what marketers should be caring about. These are proxy KPIs, originally designed to help guide investment towards the true business goals of revenue or profit. Most programmatic products are built to find the most efficient way to achieve these KPIs. They don't consider the ultimate company goal, only its own target for re-investment. Take the case of a retailer's sales target – to get more budget, the programmatic product will find the cheapest way to attribute a sale. As a product automates towards its target, it looks for the cheapest way to achieve this. Simply put, it gravitates towards those most likely to convert anyway, towards cheap non-viewable traffic, fraudulent content, or sites where users could be tricked into clicking. Ultimately, it achieves the opposite of what it is meant to do." Ben Foulkes, Account Director, Conversant.

- **Lack of brand safety**

The focus on automatization has also lead to a number of unfortunate lapses when it comes to brand safety. The mere notion that Group M actually has an appointed "brand safety and digital risk director" tells a telling tale.

"The only way to remove all risk is to buy directly, "where the surrounding content is known in advance and will not change for the entire duration that an ad is shown. Rarely, however, is the answer that simple. To buy directly is to "limit access to available inventory, audiences and tools - A "risk-based approach must be used." GroupM's Brand Safety and Digital Risk Director for EMEA, Bethan Crockett.

- **Ad Blocking**

Ad blocking was initially described as the killer app of digital advertising. In reality it has proved to be an obstacle even if not an absolute killer of business. Far more people have also installed an Ad Blocker on their computer compared to their smartphone and tablet. Taking into account that far more of the total internet traffic comes from mobile in fact reduces its impact furthermore. However, we would not go as far as neglecting its impact on the digital scene. What most marketers find most disturbing is the fact that ad blocking is a highly generational question. In Sweden and Norway the average adult ad blocking percentage is 23,6 % and 26,3 respectively (Source: TGI in Sweden and Norway). The

corresponding figures for the Silent Generation is 1,1 % and 8,7%, and for Millennials the same figure is 54,5 % and 46,8%. Thus giving the young digital generation the name "the unreachable".

- **Too much focus on hypertargeting**

Hypertargeting is closely linked to short termism. It makes intuitive sense to focus on the part of the market which are most likely to take you up on your offer. This however has a number of inherent problems. Firstly it is quite likely that the hyper targeted target group already are customers and not unlikely that they would have bought anyway. But secondly and more important – A focus on hypertargeting does not invite any new party people to the brand party. You are preaching for the choir.

Bruce McColl of Mars put it this way:

"Our task is to reach as many people as we can; to get them to notice us and remember us; to nudge them; and, hopefully, get them to buy us once more this year." **Bruce McColl, Global CMO of Mars.**

- **Native clutter overload**

With the aim to avoid advertising avoidance native solutions has been in fashion all over the fourth wave but these has in many cases been seen as destroying the editorial digital interface by using "messy native solutions".

Given the care that is often (but too rarely) is put into the user experience this is obviously not something media houses or users are absolutely happy about.

Buzzfeed described this as one of the reasons for the rebirth of the banner on their site:

"Since 2013, BuzzFeed has sidestepped the much-maligned banner ad in favour of native content. However, the company is now bringing the format back onto the site to more effectively monetize audiences." John Mccharty – *The Drum.*

- **Unviewable impressions & Fraud**

Is undoubtedly less of a problem on the kind of premium inventory which print media houses normally cater for.

However in a digital world were normally as much as 50 % of impressions are considered to be un-viewable (of different reasons) obviously the digital proposition will leave rather unrealistic expectations for the uninitiated.

- **Retargeting**

Let us just face it – as marketers, the use of retargeting has some obvious advantages whereas the misuse of retargeting is a bit like "peeing in your pants on a cold Nordic winter day". Initially you will get a warm sensation but after a while, it will be cold – very cold. The same thing will happen in the digital world and we will slowly create a new generation of advertising avoiders who prefer not to be digitally stalked. Hence driving even more peoples to find warmth in the ad block shelter.

In Kantar Medias recently conducted Dimensions study we see that 71 % of consumers agree/strongly agree that they sometimes see the same ad over and over again, and 55 % agree/strongly agree they often see ads for something they have already bought. In other words, too repetitive and waste of advertising money!

The Kantar Media Dimension survey also reveals what global marketing leaders have to say. Toby Horry of Tesco puts it this way: "If I got one more sale by re-targeting fifty times, [but] I've annoyed hundreds of people in the process, was that one extra sale worth it? Probably not". (**Kantar Media Dimension Global Leader Survey**)

- **GDPR – Unclear consequences**

"The two biggest challenges they (advertisers) face are "connecting the dots between data stored across different parts of the organizations" and "reviewing and understanding compliance levels across third parties", cited as extremely challenging or challenging by 66% of respondents and 73% respectively.

Priorities include reviewing consent mechanisms for collecting and processing data (a high priority for 94% of respondents), reviewing and updating privacy policies (63%) and reviewing data inventory to assess compliance (56%)." **World federation of Advertisers survey through WARC.**

Overall there seem to be a growing consensus that the new digital school who created the fourth wave of digital advertising has created unrealistic expectations. This does not mean that digital does not work it just means that it is not a universal remedy. The marketing doctor still recommends advertisers to eat a healthy and varied cross media diet.

We share the marketing doctor's view and believe that a combination of old offline and new online school of thinking is needed. We also believe this is an eco-system that print has a possibility to prosper in.

5 WHAT IS PRINT ANYWAY?

But let us turn our perspective back to print and see how the changes in the advertising marketplace affects print.

The development in the media industry has turned Print Audience Researchers' into quite the philosophers nowadays. We ask us the eternal questions such as:

- *What is Print?*
- *Is Print dead?*
- *But if we don't know what print is how can we know if it is dead or even dying?*

In the WWRS in Prauge 2005 Peter Callius and Anders Lithner started their paper by stating:

"Print in today's format will eventually die. While waiting for a truly digital solution print will struggle with multiple delivery platforms."

The paper continued to present a cross media measurement system where print in theory could harness the combination of on- and offline print media.

In PDRF 2015 Ingvar Sandvik & Peter Callius showed an example of how we as researchers with a combination of these data sources could practically prove that the digital offer still has a long way to go to replace print.

We are constantly talking about "the rapidly changing media eco system". Well in all honesty, we used to talk about "the rapidly changing media landscape" but digital has more quickly changed the way we talk if not walk.

It has taken the industry ten years to move from theoretical cross media to theoretical practical cross media and it remains unclear when the industry will really walk the talk. In general, we overestimate the time needed to create change but we on the other hand underestimate the effects of change. We believe the future for what was formerly known as "Print" lies in the process of being the connector between the old and the new school of marketing.

In 2005 at the ARF/ESOMAR conference in Montreal Peter Callius, Anders Lithner and Stefan Svanfeldt described the creation of an internet currency and on the subject of the divided media houses stated the following

"Many of the major Internet players have their foundation based in traditional off line media. The situation right now is that they are building a media house divided since in many cases they do not have the possibility to calculate duplication nor to take credit for the synergies that occur between the on- and offline editions of their media."

It has also led to a situation where on- and offline sales representatives are working in completely different ways. From a publisher's point of view this is clearly a waste of resources and from an advertiser's point of view it is as stupid since they cannot evaluate the full impact of an on- and offline campaign even when it is placed in the same media house."

The irony of the situation is that all the means for cooperation are now since long in place and the creation of one media house actually became a reality. But in the fourth wave of digital advertising the media houses were once again divided. In all honesty the situation seem to be the same at the advertisers; the insight director, CMO and the digital director are more often than not divided by invisible or visible walls.

We however believe the media formerly known as "Print" needs to further embrace the new school of advertising to be able to reunite the publishing house and to be completely successful. In the fifth wave – programmatic and digital and offline buying systems need to be reunited and then "One Media House" can once again be created. Again it feels right to refer to the Norwegian 2013 PDRF paper (Broady, Futsæter, Sandvik, Østnes) on how new thinking about selling and pricing print and online together could really benefit publishers advertising revenues.

Because the new school apostles of the fourth wave preach about an automatized world where digital advertising is primarily bought programmatically. And the future scope is that all advertising is to be bought as an automated process.

The new school aims to create cost benefits while creating value for advertisers by better targeted real-time direct response campaigns. This is the era of the DMP wars. Every key player of size sets up their own system - explaining to the advertising industry the obvious superiority of their own system.

The rocket fuel of the digital eco system are audiences (formerly known as target groups). Either based on *digital behaviour* (Ingvar visits 15 number of guitar sites and is thus attributed to two different segments 1) Music lovers, and 2) Nerds), or *purchase data* (Peter buys a weight losing powder and are attributed to 1) Middle age men who are losing it, and 2) Insecure wannabes. Last, but not least, the target group data can also come from *media audience research or TGI surveys*. That is, the "the rocket fuel of the new digital wave" can come from old school audience research. One step backward – two steps forward.

The new school world is in our belief a world publishers will navigate well in. They have normally a well-defined target group and they are often part of largish networks which is necessary to create critical size. The audiences can then be sliced vertically or horizontally.

6 RESEARCH IMPLICATIONS OF THE FIFTH CYBORG WAVE

The “print” media houses are living in a new media environment and this means that they have to change the way they compete. There are a number of core drivers to change that we believe challenges the research proposition of today.

In our belief the answer to the at heart philosophical question “what is print”, is that whatever it is, it is not print. Legacy print brands has evolved to be total media brands – the offer to the persons former known as readers involve communication using video, podcasts and occasionally the written word. This is then distributed and consumed on a number of different platforms.

This brings forward two research implications:

- *Any measurement of the media formerly known as “print” must involve measurement of the whole media house footprint. Also known as Total Brand Footprint.*
- *But that is not enough – since the “print” media house now is competing with other media houses not originating in the print world, the new measurement systems needs to include “all media” – cross media.*

Furthermore and as described earlier, there is a programmatic digital stampede moving over the media plains. Programmatic solutions can obviously mean many different things - automatization of the buying process is the core proposition.

However – more important might the change in the buying process be – from buying media to buying audiences. In all honesty this is what the television proposition has been all along so we are moving down well-trodden paths.

For media houses this will mean a clearer focus will be put on target groups. It also means that there will create a need for a use of consistent targeting capabilities over the different platforms of distribution.

This brings forward a third research implication:

- *If media audience research is to fully cater to the new needs of the market the new audience research needs to work as an audience (target group) – rocket fuel – provider which can create the means for a successful cross media cross target group media launch.*

The answer to today's audience research questions as well as media planning still lies in the combination of different media even though the commercial change has meant a further focus on audiences (target groups).

Generally speaking target groups are good for print. We believe the combination of on- and offline audiences based on a common target group will have the positive implications for the “print” media industry. It is however core, that the audience research supports the development. If not – Print will have individual players and not a team on the pitch when the referee starts the second half of “the digital rumble in the media jungle”.

Here we will not focus on the creation of aforementioned research but we will focus on what we believe to be the possible positive outcome of such a development.

7 THE RETURN OF THE MEDIA RESEARCH GUY – GIVING THE INDUSTRY THE RIGHT RESEARCH

In the 2015 paper we proved that prints proposition in a digital world still can stand strong. That is if print publishers and planners have the common sense to start thinking of targeted individuals (instead of machines ID's) and also by creating and using cross media environments which can take both digital and analogue media into account. Anyhow, we must admit, despite our efforts of creating multimedia environments few peoples seemed to care – or understand – how and why to use it.

In fact, a majority of the media- and communication industry seemed not to care for the traditional metrics like R&F anymore. Clicks, impressions and other measurable KPIs had taken over the scene. The Algorithm were the new crown prince. We believe that we are not the only ones who has overheard statements such as “*reach & frequency* just does not matter anymore”, “we don't plan media anymore – we evaluate outcome of purchases of audiences”.

There is however one statement which is absolutely crucial to the media “formerly known as print” and that is – “We don't buy media anymore we buy audiences”. Even though this is not a complete truthful description of the media buying environment of today, it still marks a powerful shift in paradigm. But imagine – if audiences (in prehistoric times known as target groups) is the new rocket fuel that drives the industry. Would it not make sense if print could:

“Sell audiences (programmatically or directly) based on the same target group information across the whole portfolio. This would allow advertisers to successfully combine the new school of direct response with the old school world of brand building. This would allow advertisers to successfully create synergistic links and media multi plier effects”. This would also allow advertisers to successfully get around digital advertising avoidance”.

8 PRINT SURFING THE GIGANTIC FIFTH WAVE OF DIRECT RESPONSE AND BRAND ADVERTISING

From a technical perspective there are numerous rather complicated issues to manage but from a helicopter perspective outlining a working model for print is not that difficult.

- 1) Create the audiences which best suits your media house profile both from a digital and an analogue perspective. This is the core proposition. One media house, one brand, different platforms, one audience. The audiences can obviously be advertiser specific but let us start with a set number of commercial audiences:

Research & Analysis needed: It is imperative that both on- and offline is measured in a rich target group environment and that all channels are part of the same research solution. After that it is a matter of crunching the data until you found the commercially most interesting and differentiating audiences for your media house.

- 2) Media houses need to set up a DMP containing digital data and they need to make sure that the digital data and the print data are accessible for buying common target groups - in one unifying buying system.- consider if you want to run it as a public market place and/or a private marketplace.

Research & Analysis needed: Not in the traditional sense but lots of hard work by people you will not understand

- 3) Consider what business models that will be in use. Given that the media imperative dictates that this should be a cross media offer (and this is what makes print special – at least from pure digital players) you have to consider how the buyer will be able to buy both the on and off line audience in your inventory.

This most probably involves some heavy thinking on print advertising price structures etc. On the digital side, it is slightly more straight forward since the media house can compare prices with other vendors' quite easily. The differentiating factor will be the *context* in which you will allow buyers to access the audience. And since most print media houses are premium sites – some thinking on the contextual premium needs to be done.

Furthermore, the media house need to prove and monetize the premium value they will deliver since multiple platform delivery will achieve synergies. But remember, the whole point of this exercise is that you are selling an (the same) audience in the same buying model/system (whatever that is).

Research & Analysis needed: Some research on the contextual advantage of advertising in your environment would not be out of the way. The same goes for research on synergies created through cross media delivery. You need find the optimal price for different audiences (in comparison to buying the media and not the audience directly), a task that not should be underestimated.

- 4) Get the same audiences (target groups) data accessible on your offline and online inventory.

In print – the reality is that even if you buy an audience you will get all readers (surprise), so the trick for the publisher is to find the optimum price structure on different audiences (based on profiles from the audience research and compared to the ordinary price for buying “space” in the media).

On the digital side – you will most probably be able to access two data points. Personal data if you are under a firewall or at some point required log on. And/or you will have access to behavioural data inside your domain. Obviously, the larger inventory the better. You will have two general ways of gluing the digital and the print data together.

Research needed: Either you create a “digital DNA profile” according to behavioural profile on your domain, then you would do the same on the internet audience measurement (which contains the target group data) and you create a probabilistic model which scores your inventory (log ins/cookies). You will have to put up an automated process which scores new entrants in your digital sphere.

Or you create a one to one match with the internet audience measurement. Where common individuals/cookies are identified. These individuals/cookies will then be used as a seed and they will be modelled (and the originals from the IAM discarded of) onto the larger universe by finding “twins” according to either behavioural data or data provided in the log on process.

In conclusion:

For the print industry to be able to get on the fifth wave of advertising we think that the Indian rope trick is to connect audiences between on- and offline editions. This will require some new thinking both from a commercial perspective as

well as from a research and analytical perspective. Thus bringing print audience research closer to real business issues. This is what we put large resources into creating.

For publishers and the advertisers this will bring brand building and direct response into one uniform solution. Or put in the word of two of our clients:

“Technology is advancing, but people’s essence won’t change: feelings, creativity, interpersonal connections and emotions”. Paulo Loeb, F.biz, Brazil, (Kantar Media Dimension Global Leader Survey).

“I think we have got to find metrics that are more holistic but also simpler. The best businesses are able to organize and rally a team around delivering a simple goal”. Paul Frampton, Havas Media, UK, (Kantar Media Dimension Global Leader Survey.)

In our mind it is quite likely that the future for print audience research also is to be the “inventory” data of audiences (formerly known as target groups). This means that in the future, target groups will be of equal value as the measured media in what was formerly known as media research.

We believe this will create another opportunity to create a cyborg future (where man and machine – Digital and Print) are combined into one Cyborg Surfer surfing the gigantic fifth wave of direct response and brand advertising

Surf On!



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