Re-evaluating media for recovery

Understanding the true value of media for growing brands during challenging times

ebiquity

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Introduction

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With 2020 set to go down as the most turbulent and challenging of years in all of our careers in media and marketing, I'm delighted to record that some things remain constant. Three years on from the ground-breaking report we at Ebiquity produced with our friends and partners at Radiocentre in the 2018 study Re-evaluating Media, the same team has produced this follow-up report on the role and value of media in growing brands during uncertain times.

The original report generated extensive media coverage across the marketing industry. It also stimulated a lively debate in the market, with many stakeholders suggesting that the findings felt like a call-to-arms for more effective media planning. Others suggested that it provided evidence in support of the craft of planning in an increasingly fragmented and diverse media ecosystem.

Like the 2018 paper before it, the aim of this report was to identify the truth about media effectiveness for 10 different media types. It also set out to establish the gaps that exist between the reality and the perceptions of reality about which are the most effective media channels, while also identifying the critical media attributes required to grow brands. This is more relevant than ever in these most uncertain of times.

In the 30 months since our first report, there have been significant changes in the media market, while the coronavirus pandemic has introduced a whole new level of volatility and jeopardy for marketers. Many of the consequences of COVID-19 will reverberate for some months yet, and the after-effects are likely to linger for several years at least. At Ebiquity, we have been exploring the implications of this once-in-a-lifetime market upheaval across a number of standalone research studies in the past six months. As we look to a less unstable 2021, the industry can start to chart the road to recovery and – ultimately – new growth.

With this in mind, it felt like a perfect opportunity when Radiocentre approached us with a view to replicating the 2018 study. We have designed this new analysis – independent, impartial, and robust – to evaluate the role and value of media in delivering brand success during uncertain times. What's more, as we were using the same methodology as in 2018, we were able to understand what has changed since then.

There were four main phases in this collaborative project:

1. Identify what advertisers and agencies consider to be the most important attributes in delivering a campaign that grows a brand in a recessionary period

2. Evaluate how each medium performs against these attributes through a comprehensive review of published research and Ebiquity's proprietary data sets

3. Contrast this with views gathered from interviews with over 100 advertisers and agencies on how they experience each medium performing – the key to learning how far perception is from reality

4. Produce an overall ranking of relative value of each medium, based on the evidence collected

In short, the findings reveal that the disconnect between perception and the abundant evidence still persists. To help close this gap, we believe that advertisers need to re-evaluate their approach to media and media planning as a matter of urgency. They need to measure clearly how media impacts the outcomes that matter to them, both in terms of media performance and against commercial objectives. They should then use these insights to inform media planning going forward, for the short term and the long term; for coping with the impact of COVID and beyond.

I trust you find this report interesting, timely, and helpful in your media decision-making. I look forward to discussing its findings with you.

Key takeouts

Overall findings

1. **There is a high degree of alignment between the 2020 and 2018 studies on the five most important media attributes, with building brand salience now the most valued attribute.**

2. **There is still a significant gap between perceptions of individual media performance against each attribute and what the evidence shows – this overwhelmingly favours digital media.**

3. **Media spend continues to be driven by perception over evidence, with digital media occupying the top three slots in terms of projected changes in spend for 2021.**

Radio-specific findings

1. **In terms of the evidence, radio remains the second most valuable medium after TV for successful marketing in a recession.**

2. **Perceptions of radio are catching up with reality for certain attributes (e.g. Targeting the right people in the right place at the right time; Building brand salience) meaning that radio's overall perception ranking has improved from 6th to 3rd.**

3. **These improved perceptions appear to be influencing spending intentions with a net figure of 19% of advertisers planning to invest more in the medium in 2021 vs. pre-COVID 2020 budgets – the highest net shift for any traditional medium.**

Implications

› Plan to clear media objectives and outcomes; track short and long-term

The fundamentals of best-practice media planning and measurement will always hold true. Sophisticated marketers will balance the roles and objectives of channels and formats to optimise and measure the media mix against both short (e.g. sales) and long term (e.g. brand health) business objectives.

› Plan short-term tactics with a view to maximise longer-term impact

In a period of uncertainty and media volatility, if possible, invest in media tactics for immediate return without negatively impacting brand building efforts. Changing market conditions presents opportunities as some advertisers divest.

› Understand the full advertising 'value-chain' from creative through to outcomes

Look beyond media metrics and contextualise media performance in the context of the full "advertising value chain" i.e. creative, cost, reach, attention and engagement (or other measures of value important to your organisation). Make sure all parts are working optimally together to generate ROI, profit and growth.

› Invest in analytics and outcome-focused partnerships

Build a strong data-science lead foundation to inform media investment decisions; break down any silos that hamper the ability to use insights (your own or 3rd party) in media planning. Ensure motivations of partners are aligned with your own and that their value-delivery to your organisation is fairly rewarded.

How the study was done

We conducted primary and secondary research between September and November 2020.

Primary research

We carried out a total of 102 online interviews with media decision makers at advertisers & agencies.

- **Advertisers n=58 marketers and media experts in companies spending £2m+ on advertising in the last year**
- **Agencies n=44 (32 media buying agencies, 8 full service agencies, 4 creative agencies)**

Relative importance of 12 media attributes was evaluated using maxdiff analysis where interviewees were asked to trade off the most and least important attributes in a number of different combinations.

Interviewees were not informed that the research was commissioned by the Radiocentre. All research was carried out in accordance with the Code of Conduct of the Market Research Society.

Secondary research

We searched over 50 sources and reviewed more than 100 published reports to find supporting evidence on how well each medium performs. To qualify for inclusion, the research study had to be recent (i.e. most published since 2010) with a transparent methodology and in the public domain.

We supplemented this with analysis of Ebiquity's proprietary data – norms from our data pools on CPT, profit ROI and other effectiveness measures.

Assessing performance on each attribute

We developed scoring criteria to rate media performance on each attribute. The approach to this varied depending on the attribute and nature of data available:

- **Straightforward comparison of data (e.g. CPT)**
- **Objective assessment of structural capabilities (e.g. yes, yes with limitations, no)**
- **Score allocated objectively based on combining findings from a range of research studies.**

The scoring was applied and validated by a team of Ebiquity experts.

Full details of the secondary research sources and scoring framework we used can be found in the appendices of this report.

The media channels we evaluated

- Cinema
- Direct mail – direct mail and door drops
- Magazines – print
- Newspapers – print
- Online display – non-video display and banner ads
- Online video – all video formats including YouTube and broadcaster VOD
- Out of home – all formats – roadside, airports, rail, point of sale etc.
- Radio – broadcast
- Social media – paid advertising on Facebook, twitter etc.
- TV – all formats excluding broadcaster VOD

Findings in detail

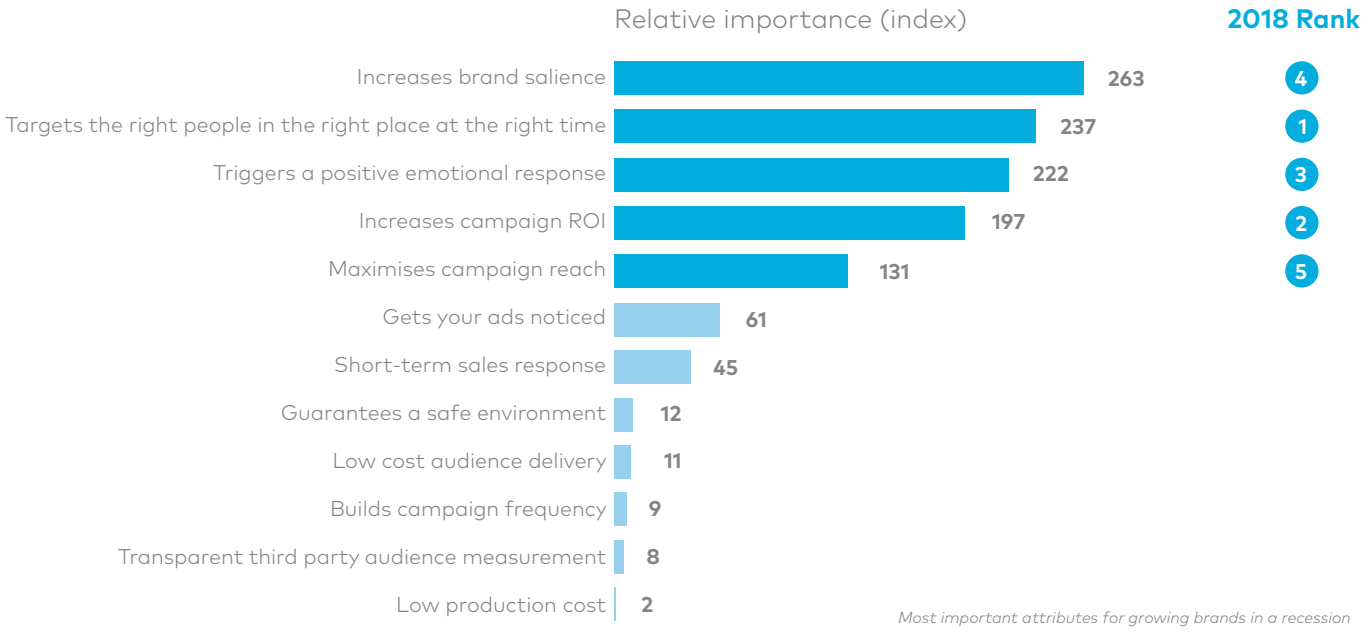
1. Alignment on the most important media attributes

There is a lot of pressure on advertisers and advertising agencies on making the right choices when it comes to selecting the best media for growing a brand during a recession. We set out to understand which media attributes they consider to be most important and which media they perceive to meet those requirements best.

The data reveal that five attributes stand out clearly as the most valuable for achieving success during uncertain times: Increases brand salience; Targets the right people in the right place at the right time; Triggers a positive emotional response; Increases campaign ROI; Maximises campaign reach. This was true of both advertisers and agencies.

Despite the change in focus from growing a brand in the longer-term in 2018 to growing a brand during recession in 2020, the same five attributes score highest in both surveys. However, there has been some re-shuffling. The key change being the rise of 'Increases brand salience' moving up from 4th in the 2018 study to 1st in the latest survey.

This could be an overdue acknowledgement of the crucial nature of salience and distinctiveness for the long-term health of brands. As e-commerce proliferates and search plays an increasingly important role in our path to purchase, brands need to ensure that they are top of mind so that their name is typed into the empty search box when the consumer begins their research. Outside of the top five, it is no surprise in the context of this study to note that the importance placed on a medium's ability to generate 'Short term sales response' has grown five-fold from an index of 9 in 2018 to an index of 45 in 2020. Difficult times often lead organisations to place greater emphasis on marketing to deliver shorter-term metrics and drive immediate revenue. This is particularly true of small advertisers (spending <£10m on media each year) among whom, with an index of 91, this attribute was deemed 10 times more important than in the 2018 analysis.



Most important attributes for growing brands in a recession

Q. Thinking now about selecting the right media mix to deliver a campaign that grows your brand during a recession, we'd like to ask you ten very short questions about the importance of different attributes of an advertising medium. For each question I will read out four attributes, please tell me which one is most important and which one is least important. Relative importance calculated using MaxDiff analysis. Base: n=102

2. The perception reality gap is still significant

In terms of perceptions, the second part of the primary research involved asking respondents to rank the 10 different media against each of the 12 attributes, using five options from 'very good' to 'very poor'.

In terms of evidence, the secondary research analysis encompassed more than 100 reports and papers across 50 sources, such as media owners and representative bodies and associations – including 29 studies reviewed for the first time in the 2020 analysis.

The full evidence vs. perception tables for each attribute are included in Appendix 1. While there have been some shifts in terms of both evidence and perceptions within the individual attributes, at a headline level the picture remains broadly similar to 2018. To calculate the overall performance ranking we took the evidence and perception scores for the different media for each attribute and weighted them by the relative importance of the attributes (based on the index). This demonstrates which media channels deliver the best value overall in terms of growing a brand during recession.

As in 2018, well-established media dominate the 2020 evidence rankings, with TV and radio coming out on top. However, with the exception of TV - and despite a rise of three places in the overall perception ranking for radio - all traditional media are undervalued by advertisers and agencies relative to the evidence. In particular, print media fall towards the bottom of the ranking in terms of perceptions while objective research places them third and fourth.

Conversely, newer media types such as online video, social media, and online display - which continue to lack publicly-available data to support their case - benefit from better perceptions to rise above their respective evidence rankings.

Overall performance ranking

2020 - Evidence

1	TV	108.5
2	Radio	102.5
3	Newspapers	82.1
4	Magazines	76.5
5	Out of home	71.2
6	Direct mail	69.6
7	Social media	65.0
8	Cinema	61.4
9	Online video	55.0
10	Online display	49.7

EVIDENCE Based on sum of scores for all 12 attributes with importance weights applied.

2020 - Perception

1	TV	52.5
2	Online video	47.0
3	Radio	46.0
4	Social media	44.6
5	Out of home	43.1
6	Cinema	42.8
7	Online display	37.6
8	Newspapers	37.5
9	Magazines	33.6
10	Direct mail	33.6

PERCEPTION Based on sum of mean scores for all 12 attributes, with importance weights applied. Base: n=102 (each respondent rated 2 attributes).

3. Media spend is driven by perception over evidence

Reviewing the 2018 study, Mark Ritson commented "I have no doubt that the league table scores of the various media are accurate, but the only ranking that matters (when it comes to media spend) is the perceptual one next to it".

How does the data back up this claim? As part of the primary research, we asked our media decision-makers to choose their top five media in terms of importance in helping brands successfully navigate the recession ahead. When faced with a direct question of this nature, advertisers and agencies are even more likely to favour digital media than in the attribute analysis.

1. TV

2. Online video

3. Social media

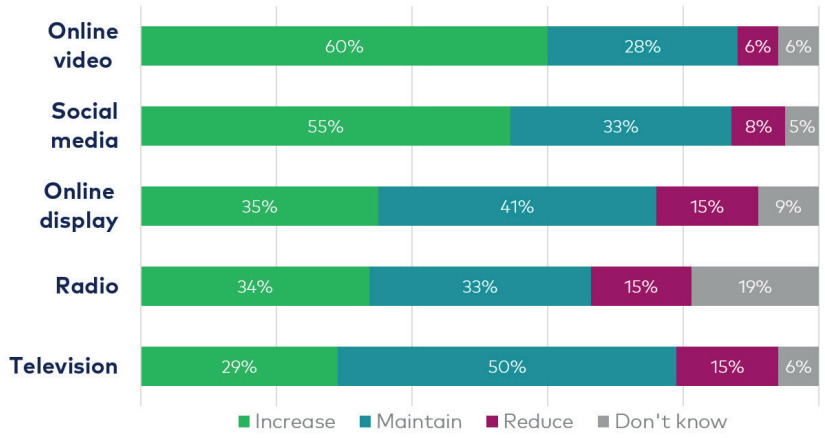
4. Radio

5. Online display

When asked which media are most important for successfully navigating the recession ahead

Q. Which media do you consider to be most important in helping your brand [ADVERTISERS] / your clients' brands [AGENCIES] successfully navigate the recession ahead? Please drag the top 5 in order of importance to the box on the right. Base: All respondents, n=102

We also asked participants to share their predictions for how 2021 budgets will change for individual media compared to their original pre-COVID 2020 budgets. This reveals further the extent to which media spending is led by perception, with digital media occupying the top three slots in terms of planned increase in expenditure.



...projected spending behaviour for 2021 overwhelmingly **favours newer media types**

In summary, in line with what we understand from psychology about how emotions drive decision-making, the data demonstrates how media spending behaviour is similarly subjective, driven more by perception over evidence.

Final thoughts

Digital media audiences and advertising spend will continue to grow but offline media will remain an important part of the media schedule for the foreseeable future. This study suggests that advertising decisions could be better informed if digital media were to address the relative lack of evidence to support their case.

To optimise their media spend, decision makers need to avoid making judgements based on instinct and interrogate their thinking more explicitly to help make more considered choices based on proof and evidence.

> *The way to block errors that orginate in system 1 is simple... recognise the signs, slow down and ask for reinforcement from system 2.*
>
> **Daniel Kahneman**

Appendices

Appendix 1: evidence/perception rankings by media attribute

1. Increases brand salience

2020 - Evidence

1	TV	10
2=	Newspapers	8
2=	Magazines	8
2=	Radio	8
5=	Direct Mail	5
5=	Online video	5
7	Out of home	5
8=	Cinema	4
8=	Online display	4
8=	Social media	4

EVIDENCE Secondary research on brand salience. Scoring based on average rank from multiple comparative studies.

2020 - Perception

1	TV	4.7
2	Radio	4.3
3	Online video	4.1
4	Cinema	4.0
5	Out of home	3.9
6	Social media	3.6
7	Magazines	3.4
8	Newspapers	3.1
9	Online display	2.7
10	Direct mail	1.9

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to increase brand salience. Base: n=17.

2. Targets the right people in the right place at the right time

2020 - Evidence

1	Radio	9
2=	Social media	8
2=	TV	8
4=	Online display	7
4=	Cinema	7
6=	Direct Mail	6
6=	Out of home	6
6=	Online video	6
9	Newspapers	5
10	Magazines	3

EVIDENCE Ebiquity's score based on whether a medium can be bought by geography, demographics, day of week. time of day, contextually, addressably (each scored 0–2 where 0=no, 1=yes with limitations, 2=yes).

2020 - Perception

1	Social media	4.2
2	Cinema	3.9
3	Direct mail	3.7
3	TV	3.7
3	Online video	3.7
6=	Radio	3.4
6=	Online display	3.4
6=	Out of home	3.4
9=	Magazines	3.2
9=	Newspapers	3.2

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to target the right people in the right place at the right time. Base: n=17.

3. Triggers a positive emotional response

2020 - Evidence

1	Cinema	10
2=	TV	9
2=	Radio	9
2=	Magazines	9
5=	Newspapers	8
5=	Out of home	8
7	Direct mail	7
8	Social Media	5
9=	Online display	3
9=	Online video	3

EVIDENCE Secondary research findings on emotional connection and seamless experience, scored from high to low on strength of evidence.

2020 - Perception

1	Cinema	4.6
2	TV	4.5
3	Online video	3.9
4	Radio	3.8
5	Out of home	3.6
6=	Social media	3.2
6=	Magazines	3.2
8	Newspapers	2.9
9	Online display	2.7
10	Direct mail	2.5

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to trigger a positive emotional response. Base: n=17.

4. Increases campaign ROI

2020 - Evidence

1	TV	10
2	Radio	9
3=	Newspapers	8
3=	Magazines	8
5	Online video	6
6	Direct Mail	5
7	Social media	4
8	Online display	3
9	Out of home	2
10	Cinema	1

EVIDENCE Ebiquity's normative data on profit ROI, scored from highest to lowest, strength of evidence from secondary research.

2020 - Perception

1	TV	4.4
2	Radio	3.9
3	Online video	3.8
4	Social media	3.6
5	Direct mail	3.5
6	Online display	3.4
7	Out of home	3.3
8=	Newspapers	3.0
8=	Magazines	3.0
10	Cinema	2.3

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to increase campaign ROI. Base: n=17.

5. Maximises campaign reach

2020 - Evidence

1	Out of home	10
2	TV	9
3	Radio	8
4=	Social media	7
4=	Direct mail	7
6	Newspapers	5
7	Magazines	3
8	Online display	3
9	Online video	2
10	Cinema	1

EVIDENCE Standalone and incremental reach based on typical scenarios using IPA Touchpoints and industry sources. Scored from high to low.

2020 - Perception

1	TV	4.8
2	Online video	4.4
3	Social media	4.3
4=	Out of home	3.8
4=	Radio	3.8
6	Online display	3.6
7	Newspapers	2.9
8	Magazines	2.5
9	Cinema	2.5
10	Direct mail	2.2

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to maximise campaign reach. Base: n=17.

6. Gets your ads noticed

2020 - Evidence

1	Cinema	10
2	TV	7
3=	Radio	6
3=	Out of home	6
5=	Online video	5
5=	Social media	5
5=	Magazines	5
5=	Newspapers	5
9	Direct mail	4
10	Online display	3

EVIDENCE Based on score for ad avoidance, stature and standout, memorability and amplification from secondary research and Ebiquity's data on retention rates. Scored from high to low.

2020 - Perception

1	TV	4.8
2	Cinema	4.5
3=	Radio	4.0
3=	Out of home	4.0
3=	Online video	4.0
6	Social media	3.6
7	Magazines	3.2
8=	Newspapers	3.1
8=	Online display	3.1
10	Direct mail	2.5

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to get ads noticed. Base: n=17.

7. Short-term sales response

2020 - Evidence

1	TV	10
2	Radio	9
3	Direct Mail	8
4=	Newspapers	7
4=	Magazines	7
6=	Online video	5
6=	Online display	5
8=	Out of home	4
8=	Social media	4
10	Cinema	1

EVIDENCE Ebiquity data and secondary research. Scored from highest evidence of short-term sales response to lowest.

2020 - Perception

1	TV	4.4
2	Radio	3.6
3=	Social media	3.5
3=	Direct mail	3.5
5=	Online video	3.3
5=	Online display	3.3
7	Out of home	3.1
8	Newspapers	2.9
9	Cinema	2.7
10	Magazines	2.5

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to deliver short-term sales response. Base: n=17.

8. Guarantees a safe environment

2020 - Evidence

1	Cinema	10
2=	Radio	9
2=	TV	9
4=	Direct mail	7
4=	Magazines	7
4=	Out of home	7
7	Newspapers	6
8=	Online video	2
8=	Online display	2
8=	Social media	2

EVIDENCE Score applied for safety of the editorial and advertising environment. Based on secondary research and Ebiquity knowledge. Scored from safest to unsafest environment.

2020 - Perception

1	TV	4.6
2	Cinema	4.5
3	Magazines	4.3
4=	Direct mail	4.1
4=	Out of home	4.1
4=	Radio	4.1
7	Newspapers	3.6
8	Online video	3.4
9=	Online display	2.8
9=	Social media	2.8

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to guarantee a safe environment. Base: n=17.

9. Low cost audience delivery

2020 - Evidence

1	Radio	10
2	Out of home	9
3=	Newspapers	7
3=	Social media	7
5	Online display	6
6	TV	5
7	Magazines	4
8	Cinema	3
9	Online video	2
10	Direct mail	1

EVIDENCE Ebiquity data and secondary research. Scored from highest evidence of short-term sales response to lowest.

2020 - Perception

1=	Social media	4.1
1=	Online display	4.1
3	Radio	3.9
4	Online video	3.8
5	Newspapers	3.5
6=	TV	3.4
6=	Direct mail	3.4
8	Out of home	3.3
9	Magazines	3.1
10	Cinema	2.2

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to deliver low cost audiences. Base: n=17.

10. Builds campaign frequency

2020 - Evidence

1=	Out of home	10
1=	Radio	10
3	Social media	8
4	Newspapers	7
5	TV	6
6	Online display	5
7	Magazines	4
8	Online video	3
9	Cinema	2
10	Direct mail	1

EVIDENCE Standalone and incremental frequency based on typical scenarios using IPA Touchpoints and industry sources. Scored from high to low.

2020 - Perception

1	Social media	4.6
2	TV	4.5
3=	Radio	4.4
3=	Online display	4.4
3=	Online video	4.4
6	Out of home	3.9
7	Newspapers	3.6
8	Magazines	3.2
9=	Cinema	1.6
9=	Direct mail	1.6

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to build campaign frequency. Base: n=17.

11. Transparent third party audience measurement

2020 - Evidence

1=	Newspapers	9
1=	Magazines	9
1=	TV	9
1=	Radio	9
1=	Out of home	9
6	Direct mail	7
7=	Cinema	6
7=	Online display	6
7=	Social media	6
10	Online video	5

EVIDENCE Secondary research and Ebiquity knowledge. Scoring based on transparency, single industry currency, third party governance and post-campaign delivery reporting. Scored from high to low.

2020 - Perception

1	Online display	4.1
2	Social media	3.9
3=	Online video	3.6
3=	TV	3.6
5	Direct mail	3.3
6=	Magazines	2.9
6=	Newspapers	2.9
6=	Radio	2.9
9	Out of home	2.8
10	Cinema	2.3

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to deliver transparent third party audience measurement. Base: n=17.

12. Low production cost

2020 - Evidence

1	Online display	10
2	Radio	9
3	Social media	8
4=	Newspapers	6
4=	Magazines	6
6	Out of home	5
7=	Online video	3
7=	TV	3
7=	Cinema	3
10	Direct mail	1

EVIDENCE AA/WARC data on production cost as a % of media spend, with assumptions made for media not covered. Scored from lowest cost to highest cost.

2020 - Perception

1	Social media	4.2
2	Radio	4.1
3=	Online display	3.8
3=	Newspapers	3.8
5	Magazines	3.6
6=	Online video	3.0
6=	Out of home	3.0
8	Direct mail	2.9
9	TV	2.1
10	Cinema	1.7

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to deliver low production cost. Base: n=17.

Appendix 2: secondary research sources

All Media

Ad Research Foundation
Advertising Association
CMO Council
IPA
ISBA
Kantar
Mediatel
WARC
WFA

Cinema

Cinema Advertising Association
Digital Cinema Media
Global Cinema Ad. Association
Pearl & Dean

Direct Mail

DMA
JICMAIL
Royal Mail Market Reach

Newspapers

Associated Press
Dow Jones
Guardian Media Group
New Interational
Newsworks
Reuters

Magazines

Bauer
Conde Nast
Magnetic Media
PPA
Time Inc.

Digital/ social media

AOL
eMarketer
Facebook
Google
IAB
JICWEBS
OFCOM
Pinterest
Twitter
UKAOP
UKOM
YouTube

Out of home

Clear Channel
Exterion
JCDecaux
OAA
Outsmart
Posterscope
Primesight
Rapport
Route
Talon

Radio

Radiocentre

TV

Channel 4
ITV
Sky
Thinkbox

Appendix 3: secondary research scoring framework

Attribute	Maximum Score	Weighting
Increases brand salience	10	2.63
Targets the right people in the right place at the right time	10	2.37
Triggers a positive emotional response	10	2.22
Increases campaign ROI	10	1.97
Maximises campaign reach	10	1.31
Gets your ads noticed	10	0.61
Short term sales response	10	0.45
Guarantees a safe environment	10	0.12
Low cost audience delivery	10	0.11
Builds campaign frequency	10	0.09
Transparent third party audience measurement	10	0.08
Low production cost	10	0.02

Based on MaxDiff ranking of attributes by 102 media decision-makers

Appendix 4: secondary research evidence

1. Increases brand salience

Definition:
Enhances long-term brand equity and the degree to which the brand is noticed or thought about in a buying situation

Scoring criteria:
0-10 where 10 is strong evidence of the medium increasing brand salience and 0 is where there is no evidence. Average rankings from comparative studies used to determine relative placement

Evidence:
Published research

Medium	Evidence	Score
Cinema	DCM: Building Box Office Brands Vol II (2016) › Cinema delivers an average impact of 2.9% on brand salience (1st place) › Cinema delivers an average impact of 2.5% on brand love (1st place) › Cinema delivers an average impact of 4% on brand consideration (1st place) Magnetic: Why Being Different Still Makes a Difference (2016) › In an average campaign cinema delivers a 3.62% uplift in brand affinity/love (1st place) Magnetic: Metrics that Matter (2016) › Vs all other media cinema is the 7th most effective at moving brand perceptions of brand relevancy › Vs all other media cinema is the least effective at driving brand quality perceptions IPA: Media in Focus (2017) › When adding cinema to the media mix, a 2% increase in average number of VL business effects is seen (last place) DCM: Mission 16-34 (2018) › Analysis of 12 recent cinema campaigns (exposed to cinema ads vs. not exposed) +30% better impression; +42% rational brand perceptions; +60% emotional brand perceptions	4
Direct Mail	Royal Mail MarketReach: This Time it's Personal (2015) › Mail valued by customers reminded them about the brand (60%), kept the brand top of mind (60%), made them think about buying (58%) and made them think positively about the brand (57%) IPA: Media in Focus (2017) › When DM is added to the media mix, a 10% increase in average number of VL business effects is seen (5th place)	5
Magazines	DCM: Building Box Office Brands Vol II (2016) › Magazines deliver an average impact of 1.8% on brand salience (3rd place) › Magazines deliver an average impact of 0.6% on brand love (5th place) › Magazines deliver an average impact of 2.2% on brand consideration (2nd place) Magnetic: Why Being Different Still Makes a Difference (2016) › Magazines deliver a 1.15% uplift in brand salience (3rd place) › Magazines deliver a 1.53% uplift in brand affinity/love (3rd place) › Magazines deliver a 0.83% uplift in brand 'meeting needs' (3rd place) Magnetic: Metrics that Matter (2016) › Vs all other media magazines are most able to move brand perceptions of brand relevancy › Vs all other media magazines are the 2nd most effective at driving brand quality perceptions Clear Channel: The Power of OOH on Consideration (2016) › Press is the 5th most impactful media on brand consideration (1.44 positive score) IPA: Media in Focus (2017) › When press is added to the media mix a 15% increase in average number of VL business effects is seen (4th place) Thinkbox: Signalling Succes (2020) › (% agreeing that medium conveys value on brand) Well-known: 3rd Magazines 44%; Popular: 2nd Magazines 41%	8

Medium	Evidence	Score
Newspapers	DCM: Building Box Office Brands Vol II (2016) › Newspapers deliver an average impact of 1.1% on brand salience (5th place) › Newspapers deliver an average impact of 1.1% on brand love (3rd place) › Newspapers deliver an average impact of 0.9% on brand consideration (3rd place) Magnetic: Why Being Different still Makes a Difference (2016) › Newspapers deliver a 0.74% uplift in brand salience (5th place) › Newspapers deliver a 1.01% uplift in brand affinity/love (4th place) Clear Channel: The Power of OOH on Consideration (2016) › Press is the 5th most impactful media on brand consideration (1.44 positive score) Magnetic: Metrics that Matter (2016) › Vs all other media newsbrands are the 4th most effective at moving brand perceptions of brand relevancy › Vs all other media newsbrands are the 3rd most effective at driving brand quality perceptions Newsworks: IPA Databank Study (2017) › Campaigns using newsbrands are 43% more likely to deliver market share growth › Campaigns using newsbrands are more than twice as likely to deliver an increase in customer loyalty IPA: Media in Focus (2017) › When press is added to the media mix a 15% increase in average number of VL business effects is seen (4th place) Newsworks: Mental Availability in the digital age (2020) › Newsbrands more likely to be associated with the most important "recommender" qualities/ social media least likely. Radio most closely associated with 'down to earth' quality. Newsworks: Why should I use newsbrands › Average campaign awareness for the test campaigns was 46%, and this rose to 54% among news brand readers. *Thinkbox: Signalling Success (2020)* › (% agreeing that medium conveys value on brand) Well-known: 3rd Newspapers 44%; Popular: 3rd Newspapers 39%	**8**

1. Increases brand salience *(continued)*

Medium	Evidence	Score
Online Display	DCM: Building Box Office Brands Vol II (2016) › Online display delivers an average impact of 0.8% on brand salience (7th place) › Online display delivers an average impact of 0.4% on brand love (6th place) › Online display delivers an average impact of 0.5% on brand consideration (5th place) Magnetic: Why Being Different Still Makes a Difference (2016) › Online display delivers a 0.28% uplift in brand salience (6th place) › Online display delivers a 0.21% uplift in brand affinity/love (7th place) › Online display delivers a 0.47% uplift in brand 'meeting needs' (4th place) Clear Channel: The Power of OOH on Consideration (2016) › Online is the 4th most impactful media on brand consideration (1.52 positive score) IAB: Impact study (2016) › Online display has positive effect on both brand awareness and favourability – uplift in both IPA: Media in Focus (2017); and IPA: Effectiveness in the Digital Era (2016) › When online display is added to the media mix a 12% increase in average number of VL business effects is seen (5th place) IAB Why digital advertising works › Digital display ads (inc. video) uplifts vs. control: unaided brand awareness +12%; brand perceptions +3%; Intent to purchase + 2%	4
Online video	DCM: Building Box Office Brands Vol II (2016) › Online video delivers an average impact of 0.8% on brand salience (8th place) › Online video delivers an average impact of 1.4% on brand love (2nd place) › Online video delivers an average impact of 0.4% on brand consideration (6th place) IPA: Media in Focus (2017) › Online video is now a powerful and efficient brand-building medium, and is more effective than other forms of online display IPA Effectiveness in the digital era, 2016 › Broadcaster VOD makes TV more effective – increase in average no. VL business effects 36% TV with B VOD, compared to 27% TV without BVOD Facebook, Nielsen 173 brand effect studies (2017) › From the moment a video ad was viewed (even before one second), lift happened across ad recall, brand awareness and purchase consideration Thinkbox Signalling Success (2020) › (% agreeing that medium conveys value on brand) Well-known: 6th video sharing sites 38%; Popular: 5th video sharing sites 29% YouTube Global Brand Insights (2019) › 40% of global shoppers say they have purchsed products they have discovered on YouTube IAB Why digital advertising works › Digital display ads (inc. video) uplifts vs. control: unaided brand awareness +12%; brand perceptions +3%; Intent to purchase + 2%	5

Medium	Evidence	Score
Out of home	DCM: Building Box Office Brands Vol II (2016) › OOH delivers an average impact of 0.9% on awareness (6th place) › OOH delivers an average impact of 0.9% on brand love (4th place) › OOH delivers an average impact of 0.7% on brand consideration (4th place) Magnetic: Why Being Different still Makes a Difference (2016) › OOH delivers a 0.26% uplift in brand salience (7th place) › OOH delivers a 1.89% uplift in brand affinity/love (2nd place) Clear Channel: The Power of OOH on Consideration (2016) › OOH is the number one most impactful media on brand consideration (1.72 positive score) Magnetic: Metrics that Matter (2016) › Vs all other media OOH is the least effective at moving brand perceptions of brand relevancy › Vs all other media OOH is the 7th most effective at driving brand quality perceptions IPA: Media in Focus (2017) Thinkbox: Killer Charts (2017) › When OOH is added to the media mix a 20% increase in average number of VL business effects is seen – 2nd place	5
Radio	Radiocentre: The Brand Multiplier (2016) › Average network size (category entry points – a range of occasions, needs and feelings which influence brand purchase) increased by +29% vs control for audio + audio visual compared to +23% for audio visual alone Radiocentre: Radiogauge (2020) › Average consideration index 110 (vs those not exposed to radio ads) across 321 brand-building radio campaigns › Average relevance index 122 (vs those not exposed to radio ads) across 321 brand-building radio campaigns DCM: Building Box Office Brands Vol II (2016) › Radio delivers an average impact of 1.2% on awareness (4th place) › Radio delivers an average impact of 0.9% on brand love (4th place) › Radio delivers an average impact of 0.7% on brand consideration (4th place) Magnetic: Why Being Different still Makes a Difference (2016) › Radio delivers a 0.85% uplift in brand salience (4th place) › Radio delivers a 0.43% uplift in brand affinity/love (6th place) Clear Channel: The Power of OOH on Consideration (2016) › Radio is the 3rd most impactful media on brand consideration (1.69 positive score) Magnetic: Metrics that Matter (2016) › Vs all other media radio is the 8th most effective at moving brand perceptions of brand relevancy › Vs all other media radio is the 4th most effective at driving brand quality perceptions IPA: Media in Focus (2017) › When radio is added to the media mix a 17% increase in average number of VL business effects is seen (3rd place) Thinkbox Signalling Success (2020) › (% agreeing that medium conveys value on brand) Well-known: 2nd. Radio 48%; Popular: 3rd. Radio 39% Radiocentre Hear and Now (2019) › Distracted exposure to radio ads when engaged in a range of other tasks leads to spontaneous brand recall increasing by 56% when creative messaging relates to the task (vs. non-related creative messaging). Radiocentre Building Shelf Awareness (2020) › Distracted exposure to ads during car journey to supermarket leads to +11% increased visibility of brands on shelf and +30% higher purchase intent (across both repertoire and non-repertoire purchasers)	8

1. Increases brand salience *(continued)*

Medium	Evidence	Score
Social Media	Magnetic: Metrics that Matter (2016) › Vs all other media social media is the 3rd most effective at moving brand perceptions of brand relevancy IPA: Media in Focus (2017) › Vs all other media social media is the 8th most effective at driving brand quality perceptions › When paid social is added to the media mix a 7% increase in average number of VL business effects is seen (7th place) Facebook, Nielsen 173 brand effect studies (2017) › From the moment a video ad was viewed (even before one second), lift happened across ad recall, brand awareness and purchase consideration Thinkbox Signalling Success (2020) › (% agreeing that medium conveys value on brand) Well-known: 5th Social media 40%; Popular: 6th Social media 24%	4
TV	DCM: Building Box Office Brands Vol II (2016) › TV delivers an average impact of 2.6% on awareness per person reached (2nd place) › TV delivers an average impact of 1.4% on brand love per person reached (2nd place) › TV delivers an average impact of 0.7% on brand consideration per person reached (4th place) Magnetic: Why Being Different Still Makes a Difference (2016) › TV delivers a 1.22% uplift in brand salience (2nd place) › TV delivers a 1% uplift in brand affinity/love (5th place) Clear Channel: The Power of OOH on Consideration (2016) › TV is the 2nd most impactful media on brand consideration (1.71 positive score) Magnetic: Metrics that Matter (2016) › Vs all other media TV is the 2nd most effective at moving brand perceptions of brand relevancy › Vs all other media TV is the most effective at driving brand quality perceptions Thinkbox: Killer Charts (2017); and IPA: Effectiveness in the Digital Era (2016) › When TV is added to the media mix a 29% increase in average number of VL business effects is seen (1st place) Thinkbox Signalling Success (2020) › (% agreeing that medium conveys value on brand) Well-known:1st TV 52%; Popular: 1st TV 50%	10

2. Targets the right people in the right place at the time

Definition:
Ability of the medium to target in this way

Scoring criteria:
0 - no
1 - yes with limitations
2 - yes

Evidence:
How the medium is bought (Ebiquity knowledge)

Medium	Geography	Demographics	Day of the week	Time of day	Contextual	Addressable	Total Score (weighted/10)
Cinema	2	2	2	1	1	0	**7**
Direct Mail	2	2	1	0	0	2	**6**
Magazines	0	2	0	0	1	0	**3**
Newspapers	2	1	2	0	1	0	**5**
Online display	1	1	2	2	1	1	**7**
Online Video	1	1	1	1	2	1	**6**
Out of home	2	1	1	1	2	0	**6**
Radio	2	2	2	2	2	1	**9**
Social media	2	2	1	1	2	2	**8**
TV	1	2	2	2	1	1	**8**

*Note: online display and video may be scored 'yes with limitations' because the basis for programmatic targeting varies from first party data-driven to assumption-based. Online video scores take into account that there is variation in targeting ability depending on online video partner (e.g. broadcaster VOD does not allow day of week targeting).

3. Triggers a positive emotional response

Definition: Emotional connection. Ability to trigger a positive emotional response (mood)	**Scoring criteria:** 0-5 where 5 is strong evidence of the ad triggering a positive emotional response and 0 where there is least emotional response	**Evidence:** Published research
Seamless experience. Non-interruptive seamless part of the media experience	0-5, where 5 is most seamless and least interruptive and 0 is least seamless and most interruptive	Published research/Ebiquity knowledge

Emotional connection

Medium	Evidence	Score
Cinema	Reel Happiness: Understanding the emotions of cinemagoers (2015) People are consistently happier in the cinema than when consuming other media (2011-15). Depending on time of day, cinema goers can be up to 50% happier than the average population at the same time DCM: The Bigger Picture Cinema audiences are four times more likely to be emotionally engaged than a television audience	5
Direct Mail	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Hear & Head (2015) People place value on things they can touch, 57% of respondents claim that receiving mail makes them feel more valued. 38% of respondents say that the physical properties of mail influence how they feel about the sender Royal Mail MarketReach: This Time it's Personal (2015) Valued mail created internal feelings (better informed 66%) directly transactional (tempted by product/service 48%) and some related to the relationship with the sender. 20% of respondents associated 9 or more emotional responses to their item Outsmart: The Customer Journey (2012) 51% of DM and door drop ad encounters generated a 'feel response' – 360 out of 710 (6th place)	3
Magazines	Magnetic: Moments that matter (2015) Magazines make people happy. At the moment of magazine consumption, subjective wellbeing measure (based on Paul Dolan's Pleasure/Purpose principle) moves up by +6% Magazine media satisfies both 'pleasure' and 'purpose' Thinkbox Killer Charts (2017) 2% of people said magazine ads 'made you feel emotional' (5th place) and 4% of ads make you laugh (4th place) Outsmart: The Customer Journey (2012) 57% of magazine ad encounters generated a 'feel response' – 312 out of 547 (4th place)	4

Medium	Evidence	Score
Newspapers	Thinkbox: Killer Charts (2017) 6% of people said newspaper ads 'made you feel emotional' (2nd place) and 5% make you laugh (3rd place) Outsmart: The Customer Journey (2012) 60% of newspaper ad encounters generated a 'feel response' – 316 out of 531 (3rd place)	3
Online Display	Outsmart: The Customer Journey (2012) 49% of online ad encounters generated a 'feel response' – 382 out of 775 (last place)	1
Online Video	Outsmart: The Customer Journey (2012) 49% of online ad encounters generated a 'feel response' – 382 out of 775 (last place)	2
Out of Home	Outsmart: The Customer Journey (2012) 62% of online ad encounters generated a 'feel response' – 1,195 out of 1,914 (2nd place) Thinkbox: Killer Charts (2017) 1% of people said OOH ads 'made you feel emotional' (last place) and 3% make you laugh (last place)	3
Radio	Radiocentre: The Emotional Multiplier (2011) Vs TV and online, radio has the biggest influence on people's happiness and energy, and on more occasions Mood-boosting effect of radio extends into the ad break generating 30% higher levels of positive engagement Thinkbox: Killer Charts (2017) 5% of people agreed you are most likely to find ads that 'made you feel emotional' on radio (4th place) and 7% 'make you laugh' (5th place) Outsmart: The Customer Journey (2012) 80% of radio ad encounters generated a 'feel' response – 214 out of 267 (1st place)	3
Social Media	No published secondary research specific to social media. Score based on Ebiquity view that emotional connection with social media ads is better than online display or video	3
TV	Thinkbox: Killer Charts (2017) TV ads are most likely to make you feel emotional (58%) (1st place) and most likely to make you laugh (1st place) Outsmart: The Customer Journey (2012) 52% of TV ad encounters generated a 'feel' response – 1191 out of 2293 (5th place)	5

Seamless experience

Medium	Evidence	Score
Cinema	Kantar Media Reactions (2020) Ad equity rankings (top five media channels where users most appreciate advertising and are least likely to view ads negatively): **1. Cinema ads**, 2. Sponsored events, 3. Magazine ads, 4. Digital OOH ads, 5. Newspaper ads Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% 3. newspapers 47% 3. radio 47% 5. TV 44% 7. digital display 27% 7. social 27%. The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% 3. OOH 12% **4. cinema 16%** 5. radio 28% 6. TV 31% 7. social 32% 8. digital display 33% DCM Mission 16-34 (2018) Cinema ads are the least intrusive video ads (social media 31%, YouTube 25%, TV 21%, catch up/on demand TV 12%, **cinema 11%**)	**5**
Direct Mail	No specific evidence but Royal Mail research shows that mail is valued and kept, implying that mail is not considered intrusive or interruptive (Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015))	**4**
Magazines	Magnetic: Moments that Matter (2015) › 80% of people believe advertising in magazines doesn't distract from the experience › 35% of people believe ads are welcomed in magazines Kantar Media Reactions (2020) Ad equity rankings (top five media channels where users most appreciate advertising and are least likely to view ads negatively): 1. Cinema ads, 2. Sponsored events, **3. Magazine ads,** 4. Digital OOH ads, 5. Newspaper ads Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): **1. magazines 57%** 2. cinema 55% 3. newspapers 47% 3. radio 47% 5. TV 44% 7. digital display 27% 7. social 27%. The ads are annoying/I feel bombarded by the ads in this medium (agree %): **1. magazines 14%** 2. newspapers 15% 3. OOH 12% 4. cinema 16% 5. radio 28% 6. TV 31% 7. social 32% 8. digital display 33%	**5**
Newspapers	Magnetic: Moments that Matter (2015) › 82% of people believe advertising in newsbrands doesn't distract from the experience › 21% of people believe ads are welcomed in newsbrands Kantar Media Reactions (2020) Ad equity rankings (top five media channels where users most appreciate advertising and are least likely to view ads negatively): 1. Cinema ads, 2. Sponsored events, 3. Magazine ads, 4. Digital OOH ads, **5. Newspaper ads** Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% **3. newspapers 47%** 3. radio 47% 5. TV 44% 7. digital display 27% 7. social 27%. The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% **2. newspapers 15%** 3. OOH 12% 4. cinema 16% 5. radio 28% 6. TV 31% 7. social 32% 8. digital display 33%	**5**

Medium	Evidence	Score
Online display	Teads: Why People Block Ads (2016) › Over 3 in 4 people say that intrusive ads were the largest motivator for installing ad blockers CMO Council: How Brands Annoy Fans (2017) › When asked does brand advertising detract from your enjoyment of the content you consume online – 43% said yes › Intrusive pop up ads were the digital ad format found most irritating (22%) › 'Text only ads that ask you to click through to something' and 'ads that come up before the page you wanted' were rated the third most irritating digital format (10%) Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% 3. newspapers 47% 3. radio 47% 5. TV 44% 7. **digital display 27%** 7. social 27%. The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% 3. OOH 12% 4. cinema 16% 5. radio 28% 6. TV 31% 7. social 32% **8. digital display 33%**	2
Online video	Teads: Why People Block Ads (2016) › Over 3 in 4 people say that intrusive ads were the largest motivator for installing ad blockers › Pre-roll is the most intrusive video format 52% of people who have ad blockers installed rate pre-roll as the most intrusive video format (vs. 24% for native video) CMO Council: How Brands Annoy Fans (2017) › When asked does brand advertising detract from your enjoyment of the content you consume online – 43% said yes › Auto-playing video ads were rated as the second most irritating digital format (17%)	1
Out of home	Kantar Media Reactions (2020) Ad equity rankings (top five media channels where users most appreciate advertising and are least likely to view ads negatively): 1. Cinema ads, 2. Sponsored events, 3. Magazine ads, **4. Digital OOH ads**, 5. Newspaper ads Magnetic Pay Attention 2019 The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% **3. OOH 12%** 4. cinema 16% 5. radio 28% 6. TV 31% 7. social 32% 8. digital display 33%	1
Radio	Radiocentre: Getting Vocal (2017) › 27% of Amazon Echo users say the ads feel very natural vs. 10% say they feel very interruptive Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% 3. newspapers 47% **3. radio 47%** 5. TV 44% 7. digital display 27% 7. social 27%. The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% 3. OOH 12% 4. cinema 16% **5. radio 28%** 6. TV 31% 7. social 32% 8. digital display 33%	4

Seamless experience *(continued)*

Medium	Evidence	Score
Social Media	CMO Council: How Brands Annoy Fans (2017) › When asked does brand advertising detract from your enjoyment of the content you consume online – 43% said yes No research evidence specific to social media Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% 3. newspapers 47% 3. radio 47% 5. TV 44% 7. digital display 27% **7. social 27%** The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% 3. OOH 12% 4. cinema 16% 5. radio 28% 6. TV 31% **7. social 32%** 8. digital display 33%	**2**
TV	Magnetic Pay Attention 2019 Advertising is part of the experience (agree %): 1. magazines 57% 2. cinema 55% 3. newspapers 47% 3. radio 47% 5. **TV 44%** 7. digital display 27% 7. social 27% The ads are annoying/I feel bombarded by the ads in this medium (agree %): 1. magazines 14% 2. newspapers 15% 3. OOH 12% 4. cinema 16% 5. radio 28% **6. TV 31%** 7. social 32% 8. digital display 33%	**4**

4. Increases campaign ROI

Definition:
Proven to increase overall campaign ROI (return on media investment)

Scoring criteria:
0-10 where 10 the highest ROI and 0 is the lowest

Evidence:
Published research /Ebiquity norms

Medium	Evidence	Score
Cinema	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › RROI (revenue return on investment) is between £2–3 – 5th place DCM: Building Box Office Brands Volume II (2016) › By increasing spend to the recommended level of 2.7%, campaigns could deliver £3.70 RROI for every £1 spent on the overall media campaign	1
Direct Mail	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › Campaigns including mail were 27% more likely to deliver top-ranking sales performance and 40% more likely to deliver top-level acquisition levels › When mail was included, the total comms ROI jumped 12% – from £4.22 to £4.73 › RROI (revenue return on investment) for direct mail is over £4 – 2nd place (equal to TV) › RROI (revenue return on investment) for door drops is £3 – 4th place	5
Magazines	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › RROI (revenue return on investment) for print is over £6 – 1st place Radiocentre: Radio the ROI Multiplier (2013) › Average RROI (revenue return on investment) for magazines is £5.80 – 3rd place › Ebiquity database (2014–20): £1.44 Profit ROI (print combined) – 3rd place Magnetic Attention Pays (2019) Magazines are top profit ROI contributor for beauty products (deploying 5% of budget would lead to 164% increase in ROI) and 3rd highest contributor for finance brands (deploying 6% of budget would lead to 68% increase in ROI) Thinkbox - Profitability PRINT: Scalability (rank 3); efficiency at low spend levels (rank 3); profit likelihood short term 61% (rank 3); long-term multiplier x1.70 (rank 4); profit likelihood in long-term 78% (rank 2)	8
Newspapers	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › RROI (revenue return on investment) for print is over £6 – 1st place Radiocentre: Radio the ROI Multiplier (2013) › Average RROI (revenue return on investment) for press is £5.80 – 3rd place Newsworks: The ROI Study (2016) › Print newsbrands boost total campaign ROI by 2.8 times (retail sector) 70% (automotive sector) and by up to 5.7 times (finance) Ebiquity database (2014–20): £1.44 Profit ROI (print combined) – 3rd place Thinkbox - Profitability PRINT: Scalability (rank 3); efficiency at low spend levels (rank 3); profit likelihood short term 61% (rank 3); long-term multiplier x1.70 (rank 4); profit likelihood in long-term 78% (rank 2) Newsworks – Planning for Profit › Increasing print newsbrands' share of budget to optimal level would more than double current campaign PROI Newsworks IPA Databank Study 2019 › Campaigns using radio are 58% more likely to deliver profit	8

4. Increases campaign ROI *(continued)*

Medium	Evidence	Score
Online display	**Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015)** › RROI (revenue return on investment) is less than £2 – 6th place **Radiocentre: Radio the ROI Multiplier (2013)** › Average RROI (revenue return on investment) for online is £4.90 – 4th place Ebiquity database (2014–20):- £0.82 Profit ROI – 6th place **Thinkbox - Profitability** Scalability (rank 5); efficiency at low spend levels (rank 5); profit likelihood short term in short term 37% (rank 5); long-term multiplier x1.05 (rank 6); profit likelihood in long-term 40% (rank 6) **IAB Why digital advertising works** £1.94 (revenue) ROI in offline sales measured across 6x FMCG brands (source: Nectar Insights/Nielsen Homescan)	**3**
Online video	Ebiquity database (2014–20): £1.21 Profit ROI – 4th place **Thinkbox - Profitability** › Scalability (rank 4); efficiency at low spend levels (rank 4); profit likelihood in short term 52% (rank 4); long-term multiplier x2.05 (rank 2); profit likelihood in long-term 67% (rank 4)	**6**
Out of home	**Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015)** › RROI (revenue return on investment) is £3 – 4th place **Radiocentre: Radio the ROI Multiplier (2013)** › Average RROI (revenue return on investment) for OOH is £2.00 – 5th place Ebiquity database (2014–20): £0.57 Profit ROI – 7th place **Talon ROI research** › Increasing investment in OOH as part of the communications mix drives ROI for advertisers; other media channels ROI improves when OOH included in the mix **Peter Field analysis of IPA Databank for Rapport** › 26% increase in profit for campaigns that invest >15% budget in OOH vs those that don't use the medium; other media channels ROI improves when OOH included in the mix **Thinkbox - Profitability** Scalability (rank 6); efficiency at low spend levels (rank 6); profit likelihood in short term 19% (rank 6); long-term multiplier x1.95 (rank 3); profit likelihood in long-term 48% (rank 5)	**2**
Radio	**Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015)** › RROI (revenue return on investment) for radio is £4 – 3rd place **Radiocentre: Radio the ROI Multiplier (2013)** › Average campaign RROI (revenue return on investment) is £7.70 – 2nd place › When radio's % share of media budget rises to over 20% campaign RROI rises to £8.20 Ebiquity database (2014–20): £1.69 Profit ROI – 2nd place **Thinkbox - Profitability** › Scalability (rank 2); efficiency at low spend levels (rank 2); profit likelihood in short term 62% (rank 2); long-term multiplier x1.3 (rank 5); profit likelihood in long-term 75% (rank 3)	**9**

Medium	Evidence	Score
Social Media	Facebook Consumer Mix Model, Kantar WorldPanel (2017) › On average, the return on pounds spent on Facebook was £1.79 Ebiquity database (2014–17): £1.14 (based on <50 data points) – 5th place	4
TV	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › RROI (revenue return on investment) is over £4 – 2nd place (equal to DM) Radiocentre: Radio the ROI Multiplier (2013) › Average RROI (revenue return on investment) for TV is £8.70 – 1st place Ebiquity database (2014–20): £1.73 Profit ROI – 1st place Thinkbox - Profitability › Scalability (rank 1); efficiency at low spend levels (rank 1); profit likelihood in short term 70% (rank 1); long-term multiplier x2.45 (rank 1); profit likelihood in long-term 86% (rank 1)	10

5. Maximises campaign reach / 10. Builds campaign frequency

Definition: Maximises 1+ campaign reach (either as a primary driver of reach or extending reach of other media)	**Scoring criteria:** 0 - 10 where 10=highest, 0=lowest	**Evidence:** Standalone reach/frequency (50% of score) - industry sources/IPA Touchpoints, based on a typical heavyweight 4 week campaign Incremental reach frequency (50% of score) - IPA Touchpoints. Based on typical scenarios: A. Base of TV (£1.5m) with incremental gain of moving 20% budget B. Base of radio (600k) with incremental gain of moving 50% budget
Builds frequency (OTS/OTH) as a single medium or in a multi-media campaign	0 - 10 where 0=highest, 0=lowest	

	% Reach			
Medium	Solus reach	Incremental reach (A)	Incremental reach (B)	**Score**
OOH	88	91	80	**10**
Radio	76	90	68	**8**
Social	61	87	78	**7**
Press	61	86	77	**5**
Online display	47	84	66	**4**
Mags	42	83	67	**3**
Direct mail	100	82	65	**7**
VOD	37	81	63	**2**
Cinema	12	81	62	**1**
TV	81	80	79	**9**

	Frequency			
Medium	Solus	Scenario 1	Scenario 2	**Score**
Radio	12	9	10	**10**
OOH	21	7	7	**10**
Press	11	7	7	**7**
Mags	2	7	6	**4**
TV	13	7	6	**6**
Online display	3	6	7	**5**
Cinema	1.24	5	6	**2**
Social	4.8	7	7	**8**
VOD	1	5	6	**3**
Direct mail	1	5	5	**1**

6. Gets your ads noticed

Definition: **Level of ad avoidance -** Extent to which consumers can deliberately ignore or avoid seeing the ads	**Scoring criteria:** 0 - 3 where 3 is evidence to show lowest level of ad avoidance and 0 where there is the highest ad avoidance	**Evidence:** Secondary research/Ebiquity knowledge
Stature and stand out - Medium's sheer physical size, scale and viewability	**Scoring criteria:** 0 - 2 where 2 is the biggest size and scale and 0 is minimal size or standout during ad exposure	**Evidence:** Secondary research/Ebiquity knowledge
Memorability - Medium's ability to make ad/brand message, audio or visual memorable and easy to recall	**Scoring criteria:** 0 - 3 where 3 is the best memorability and 0 is the lowest	**Evidence:** Secondary research/Ebiquity proprietary data
Amplification - Medium's ability to get audience talking and sharing your message on and offline	**Scoring criteria:** 0 - 2 where 2 is strongest evidence of amplification and 0 where there is little or no amplification	**Evidence:** Secondary research

Level of ad avoidance

Medium	Evidence	Score
Cinema	Radiocentre: You Can't Close Your Ears (2006) › Cinema (and radio) has the joint lowest hard avoid levels (18%), cinema has the highest engagement score (33). Reinforces the theory that the ads are part of the cinema experience	3
Direct mail	Royal Mail MarketReach, Door Drop Stats Refresh, Illuminas (2014) › 92% of all people say they read door drops that get delivered to their homes Royal Mail MarketReach, Ethnographic Quant, Trinity McQueen (2014) › Mail open rates range from 71% for a brochure purchased from before, 60% for an addressed letter about a product/service to 54% for a brochure they have not purchased from before or an unaddressed leaflet	3
Magazines	Radiocentre: You Can't Close Your Ears (2006) › At 34%, magazine hard avoidance levels are higher than average but will vary widely according to the relationship between reader and magazine	3
Newspapers	Radiocentre: You Can't Close Your Ears (2006) › Newspapers have the highest hard avoidance levels (37%) and lowest engagement score (15)	1
Online display	IAB: Ad blocking software – consumer usage and attitudes (2017) › 22.1% of total online population are using ad blocking software Teads: Why People Block Ads (2016) › When asked which type of ads do you use your ad blocker to remove – 84% said pop-up, 45% said display ads IAB Ad Blocking Feb 2020 › 23.7% of GB adults have downloaded an ad blocker and are currently using Kantar TGI Global Quick View 2020 › In 25 markets half of connected consumers always or sometimes use ad blocking	1

Medium	Evidence	Score
Online video	IAB: Ad blocking software – consumer usage and attitudes (2017) › 22.1% of total online population are using ad blocking software Teads: Why People Block Ads (2016) › When asked which type of ads do you use your ad blocker to remove – 84% said pop-up, 40% said pre-roll	1
Out of home	No published research but it is extremely difficult to deliberately avoid outdoor ads	2
Radio	Radiocentre: You Can't Close Your Ears (2006) › Radio has the joint lowest hard avoid levels (18%) and an "inattentiveness" score of 64% WARC A new benchmark for mechanical avoidance of radio advertising (2020) › Mechanical avoidance (i.e. avoidance by switching channels, muting the sound, or turning off the set) of radio advertising is low (3%)	2
Social media	No published research, ad blockers don't block social media ads but social media ads can be scrolled past very quickly	1
TV	Radiocentre: You Can't Close Your ears (2006) › 31% hard avoid levels – 3rd highest after newspapers and magazines Thinkbox/BARB (2016) › People skip the majority of ads in playback viewing (which are not counted and hence free to advertisers), but there's no sign that people are deliberately recording TV in order to skip ads. Levels of playback on equivalent BBC content are very similar to commercial TV	1

Stature and stand-out

Medium	Evidence	Score
Cinema	DCM: Engagement Study – The Bigger Picture (2014) › A digital quality screen the size of two double-decker buses and Dolby surround sound – audiences take more DCM Mission 16-34 (2018) › 66% agree "I pay more attention to ads on cinema than elsewhere" Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% 4. TV 21% 5. radio 17% 6. digital display 15% 6. social 15%	2
Direct Mail	Ebiquity opinion	1
Magazines	Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% 4. TV 21% 5. radio 17% 6. digital display 15% 6. social 15%	2

Stature and stand-out *(continued)*

Medium	Evidence	Score
Newspapers	Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% **2. magazines 35%** 3. newspapers 29% 4. TV 21% 5. radio 17% 6. digital display 15% 6. social 15%	**2**
Online display	Meetrics: viewability report (Q3 2017) › 52% of UK online ad impressions met the definition of Viewability from the Media Rating Council and IAB (at least 50% of the surface of an online ad has to appear in the visible area of the browser for at least 1 second) Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% 4. TV 21% 5. radio 17% **6. digital display 15%** 6. social 15%	**0**
Online video	Meetrics: viewability report (Q3 2017) › 52% of UK online ad impressions met the definition of Viewability from the Media Rating Council and IAB (at least 50% of the surface of an online ad has to appear in the visible area of the browser for at least 1 second)	**1**
Out of home	Ebiquity opinion	**2**
Radio	Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% 4. TV 21% **5. radio 17%** 6. digital display 15% 6. social 15%	**1**
Social Media	Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% **4. TV 21%** 5. radio 17% 6. digital display 15% 6. social 15%	**1**
TV	Magnetic Pay Attention 2019 › Proportion claiming to pay attention to ads: 1.cinema 40% 2. magazines 35% 3. newspapers 29% **4. TV 21%** 5. radio 17% 6. digital display 15% 6. social 15%	**1**

Memorability

Medium	Evidence	Score
Cinema	DCM: Engagement study – The Bigger Picture (2014) › 13% of the cinema cell spontaneously recalled seeing advertising vs. 1.6% on TV. Cinema 8 times the ad recall of TV alone › From and unbranded creative still 71% of cinema respondents recognised the ads vs. 35% of the TV sample. Cinema delivered twice the ad recognition of TV alone › Ebiquity database: retention rates circa 80% (top tier)	3
Direct Mail	Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › 80% of respondents said they could remember seeing or reading some mail sent to them in the last four weeks › Ebiquity database: retention rates 30-50% (3rd tier)	3
Magazines	No published research › Ebiquity database: retention rates circa 50-70% (2nd tier)	2
Newspapers	No published research › Ebiquity database: retention rates circa 50-70% (2nd tier)	2
Online display	No published research › Ebiquity database: retention rates circa 30% (4th tier)	1
Online video	No published research › Ebiquity database: retention rates circa 50-70% (2nd tier)	2
Out of home	No published research › Ebiquity database: retention rates circa 50-70% (2nd tier)	2
Radio	› Radiocentre Multiplier Study Ad Awareness (2000) › Radio was, on average, three-fifths as efficient as TV at driving advertising awareness › Ebiquity database: retention rates circa 50-70% (2nd tier) Radiocentre Hear and Now (2019) Memory encoding of six radio ads heard when distracted with other activities ranks in 53rd percentile when benchmarked against 400 TV and radio campaigns, increasing to 94th percentile when creative message relates to activity being undertaken	3
Social media	No published research › Ebiquity database: retention rates circa 30% (4th tier)	1
TV	No published research › Ebiquity database: retention rates circa 80% (top tier)	3

Amplification

Medium	Evidence	Score
Cinema	Clear Channel: The Power of OOH on Consideration (2016) › Cinema is 2nd most effective media in driving conversation DCM Mission 16-34 (2018) 56% agree "I talk to people I go to the cinema with about the ads while watching them"	2
Direct mail	Royal Mail MarketReach: The Private Life of Mail (2015) › An average of 23% of all mail is shared between people in a household Royal Mail MarketReach: This Time it's Personal (2015) › As a result of receiving mail 18% of people recommended their product/service to friends/family and 33% talk to others/ discussed it	1
Magazines	Clear Channel: The Power of OOH on Consideration (2016) › Press is third most effective media in driving conversation Thinkbox: Killer Charts (2017) › 7% of people said they are likely to find ads that they talk about (face to face or on the phone) in magazines (5th place) Magnetic: Rules of Attraction (2015) › 1 in 2 magazine readers often share adverts with friends and family	1
Newspapers	Clear Channel: The Power of OOH on Consideration (2016) › Press is third most effective media in driving conversation Thinkbox: Killer Charts (2017) › 8% of people said they are likely to find ads that they talk about (face to face or on the phone) in newspapers (4th place)	1
Online display	Clear Channel: The Power of OOH on Consideration (2016) › Online is the 4th most effective media in driving conversation	1
Online video	Clear Channel: The Power of OOH on Consideration (2016) › Online is the 4th most effective media in driving conversation	1
Out of home	Thinkbox: Killer Charts (2017) › 3% of people said they are likely to find ads that they talk about (face to face or on the phone) out of home (7th place)	0
Radio	Radiocentre: Audio Now (2014) › Brand fame – extent to which people have talked about the brand, campaigns that had used radio had a far stronger fame effect than those which did not Thinkbox: Killer Charts (2017) › 7% of people said they are likely to find ads that they talk about (face to face or on the phone) on the radio	1

Medium	Evidence	Score
Social media	(6th place) No published research but social media is designed for consumers to share and amplify	2
TV	Clear Channel: The Power of OOH on Consideration (2016) › TV is the most effective media in driving conversation Thinkbox: Killer Charts (2017) › 53% of people said they are likely to find ads that they talk about (face to face or on the phone) on TV (1st place) Thinkbox: TV Ad Effectiveness: A Brand's Best Friend (2014); and Killer Charts (2017). › TV advertising drives 51% of marketing-generated conversations (1st place) › TV drives word of mouth for a number of weeks after initial activity	2

7. Short term sales response

Definition:
Ability to activate sales in the short term

Scoring criteria:
0-10, where 10 is strong evidence of the medium delivering short-term sales response and 0 where there is no evidence

Evidence:
Secondary research/Ebiquity knowledge (econometric modelling)

Medium	Evidence	Score
Cinema	Thinkbox Demand Generation 2019 Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% 3. Online display 8% 4. Radio 7% 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% **9. Cinema 2%**	1
Direct Mail	Outsmart: The Customer Journey (2012) › 54% of DM and door drop encounters generated a 'do' response (2nd place) Thinkbox: Killer Charts (2017) › DM and door drop accounts for 8% of media-driven sales (4th place) Royal Mail MarketReach: The Private Life of Mail – Mail In The Home, Heart & Head (2015) › When compared to using email on its own, adding mail saw 13% more consumers visit a sender's website, 21% more, 8 made purchases, 35% more redeemed coupons or vouchers Royal Mail/IPA Touchpoints (2015) › In response to direct mail 49% used a voucher or coupon/27% bought something/26% renewed a service/subscription Royal Mail MarketReach, Mail and Digital Part 2, (2014) › As a result of receiving mail 92% of people are driven online, 87% make online purchases, 86% connect with businesses	8

7. Short term sales response *(continued)*

Medium	Evidence	Score
Magazines	Outsmart: The Customer Journey (2012) › 49% of magazine encounters generated a 'do' response (4th place) › 25% of encounters with press generated search (online & mobile) (3rd place) Thinkbox: Killer Charts (2017) › Print accounts for 8% of media driven sales (3rd place) Magnetic: Rules of Attraction (2015) › 81% of people have bought an item or visited a place after reading about it in a magazine Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% **2. print 10%** 3. Online display 8% 4. Radio 7% 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	7
Newspapers	Outsmart: The Customer Journey (2012) › 49% of newspaper encounters generated a 'do' response (4th place) › 25% of encounters with press generated search (online and mobile) (3rd place) Thinkbox: Killer Charts (2017) › Print accounts for 8% of media-driven sales (3rd place) Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% **2. print 10%** 3. Online display 8% 4. Radio 7% 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2% Newsworks IPA Databank Study 2019 Campaigns using newsbrands are 9% more likely to drive sales	7
Online display	Outsmart: The Customer Journey (2012) › 47% of online encounters generated a 'do' response (5th place) › 21% of encounters with online generated search (online and mobile) (1st place) Thinkbox: Killer Charts (2017) › Online display accounts for 12% of media-driven sales (2nd place) IAB Digital Advertising Effectiveness › Digital display (inc. video) increases intent to purchase by 3% Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% **3. Online display 8%** 4. Radio 7% 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	5
Online video	Outsmart: The Customer Journey (2012) › 47% of online encounters generated a 'do' response (5th place) › 21% of encounters with online generated search (online and mobile) (1st place) Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% 3. Online display 8% 4. Radio 7% 4. OOH, 7% 6. social media 6% **7. online video 5% 8. broadcaster VOD 4%** 9. Cinema 2% IAB Digital Advertising Effectiveness › Digital display (inc. video) increases intent to purchase by 3%	5

Medium	Evidence	Score
Out of home	Outsmart: Outperform (2016) › Across all campaigns (35) 9% took brand action on smartphone per campaign Outsmart: The Customer Journey (2012) › Two-thirds of people have searched the web as a direct result of an OOH ad › 1 in 3 people have bought because of OOH advertising › 53% of OOH encounters generated a 'do' response (3rd place) › 27% of encounters with OOH generated search (online and mobile) (2nd place) Thinkbox: Killer Charts (2017) › Outdoor (combined with radio) accounts for 4% of media-driven sales (5th place) Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% 3. Online display 8% 4. Radio 7% **4. OOH, 7%** 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	4
Radio	Radiocentre: Sales Multiplier (2003) › Radio advertising creates an average sales uplift of 9% › Radio advertising creates an average sales uplift of 2.2% per 100 radio ratings Radiocentre: The Online Multiplier (2010) › Those exposed to the radio campaign were 52% more likely to include the brand name in their internet browsing. 58% went online within 24 hours of exposure Outsmart: The Customer Journey (2012) › 61% of radio encounters generated a 'do' response (1st place) Thinkbox: Killer Charts (2017) › Radio (combined with outdoor) accounts for 4% of media-driven sales (5th place) Radiocentre Building Shelf Awareness 2020 › Distracted exposure to ads during car journey to supermarket increases purchase intent by 30% (across both repertoire and non-repertoire purchasers) Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% 3. Online display 8% **4. Radio 7%** 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	9
Social media	Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): 1. TV 23% 2. print 10% 3. Online display 8% 4. Radio 7% 4. OOH, 7% **6. social media 6%** 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	4
TV	Outsmart: The Customer Journey (2012) › 34% of TV encounters generated a 'do' response (6th place) › 18% of encounters with TV generated search (online and mobile) (4th place) Thinkbox: Killer Charts (2017) › TV accounts for 33% of media-driven sales (1st place) › 47% of website visits generated from paid media were from TV Thinkbox Demand Generation 2019 › Average proportion of media driven sales (first 2 weeks of campaign): **1. TV 23%** 2. print 10% 3. Online display 8% 4. Radio 7% 4. OOH, 7% 6. social media 6% 7. online video 5% 8. broadcaster VOD 4% 9. Cinema 2%	10

8. Guarantees a safe environment

Definition:
Ad appears in an environment that is third party regulated, ad is guaranteed not to appear in an inappropriate context

Scoring criteria:
0-10, where 10 is safest environment and 0 is least safe environment (up to 5 points for editorial environment and 5 points for advertising environment)

Evidence:
Secondary research/Ebiquity knowledge

Medium	Evidence	Score
Cinema	Editorial: BBFC – regulates all films shown in UK cinemas Advertising: Cinema Advertising Association self-regulates using the ASA CAP code	10
Direct mail	Editorial: The Direct Marketing Commission (DMC) oversees and enforces the Direct Marketing Association (DMA)'s Code Advertising: Self-regulated, ASA CAP code	7
Magazines	Editorial: Independent Press Standards Organisation Advertising: Self-regulated, ASA CAP code	7
Newspapers	Editorial: Independent Press Standards Organisation Advertising: Self-regulated, ASA CAP code	6
Online display	Editorial: ISPA Code of Practice – applies to members only, Internet Watch Foundation (monitors for child abuse) Advertising: Self-regulated, IAB Digital Advertising Policy Guide/ASA CAP code JICWEBS guidelines for online brand safety Advertisers must subscribe to third party ad verification CMO Council, Brand protection from digital content infection (2017) › A quarter of the world's marketers have reported specific examples of where their digital advertising appeared alongside offensive and compromising content › 72% of brand advertisers engaged in programmatic buying are concerned about brand integrity and digital display placement Pinterest It Pays to Be Positive (YouGov Aug 2020) Around half of over 2,000 respondents surveyed said: If a brand or ad appears alongside harmful content, they assume that the brand endorsed it or are aware that they're adjacent to it; if a brand shows up alongside negative content, it negatively impacts their perception of the brand; If a brand appears next to misinformation (e.g. health or election content), it appears less trustworthy	2
Online video	Editorial: Ofcom regulate broadcaster VOD, BBFC has some involvement with providers of streamed films See online display above Advertising: See online display above	2

Medium	Evidence	Score
Out of home	Editorial: Department for Communities and Local Government and local planning controls Advertising: Self-regulated, ASA CAP code	7
Radio	Editorial: Ofcom regulated Advertising: Self-regulated, Radiocentre, ASA BCAP code	9
Social media	Editorial: Self-moderated, providers are under increasing criticism for failing to moderate content Advertising: Self-regulated using ASA CAP code which covers paid and earned social JICWEBS guidelines for online brand safety. Advertisers must subscribe to third party ad verification See online display for further evidence	2
TV	Editorial: Ofcom regulated Advertising: Self-regulated via broadcaster-funded copy clearance body Clearcast, follows ASA BCAP code	2

9. Low cost audience delivery / 12. Low production cost

Definition:
Low cost audience delivery – media cost per thousand
Low production cost – production as a % of media cost

Scoring criteria:
10 = lowest cost – 1 = highest cost
10 = lowest cost – 1 = highest cost

Evidence:
Ebiquity proprietary data
Secondary research. AA/WARC 2016

	Audience delivery		**Production cost**		
Medium	**All adult CPT**	**Score**	**Production cost**	**Score**	**Production cost**
Cinema	£24.19	**3**	N/A	**3**	Production cost assumed to be same as TV
Direct Mail	£44.80	**1**	N/A	**1**	CPT Royal Mail Ratecard (addressed mail and door drop) with an assumed 20% discount applied. Production cost assumed to be most expensive
Magazines	£8.93	**4**	4.3% (all print)	**6**	
Newspapers	£4.16	**7**	4.3% (all print)	**6**	
Online display	£4.43	**6**	7.1% (all online)	**10**	Production cost assumed to be cheapest
Online video	£25.06	**2**	7.1% (all online)	**3**	Production cost assumed to be same as TV
Out of home	£3.83	**9**	5.6%	**5**	
Radio	£1.56	**10**	2.7%	**9**	
Social media	£4.04	**8**	N/A	**8**	Production cost assumed to be more expensive than online display as more executions needed
TV	£5.45	**5**	14%	**3**	

11. Transparent audience measurement

Definition:
Audience measurement tool (survey) is fully transparent and is verified by third parties (JIC). Transparent post campaign delivery reports are provided

Scoring criteria:
0-10, where 10 is the audience measurement is fully transparent and third party verified and 0 is no transparency or third party verification

Evidence:
Secondary research/Ebiquity knowledge

Medium	Evidence	Score
Cinema	› Cinema admissions are monitored by ComScore (transparent methodology as census of all cinemas) › Cinemas feed admissions data to contractors for campaign delivery reports › Demographic data collected through survey-based tools such as Fame survey › Very little information about the tools online so lacking in transparency › Measurement tools overseen by the Cinema Advertising Association and industry representatives from film exhibitors and distributors	6
Direct mail	› A Joint Industry Committee (JIC) JICMAIL has recently been formed and is backed by buyer and seller organisations including the DMA, IPA, ISBA, Royal Mail and Whistl. It has set up a panel-based survey tool to measure audiences and deliver media planning metrics to provide an industry currency. Methodology is fully transparent on website. Not yet established in the industry › Royal Mail has ABC accreditation for its Customer Summary report, including auditable proof of delivery. Little information available on Royal Mail website	7
Magazines	› ABC – print verification › AMP is governed by the Publishers Audience Measurement Company (PAMCo) whose stakeholders are the News Media Association, Professional Publishers Association and the Institute of Practitioners in Advertising. The board also has representation from the Incorporated Society of British Advertisers (ISBA). Methodology and questionnaire are fully transparent › JICREG – local newspaper readership (print and online) › No post-campaign delivery reports – campaign impacts have to be derived by agency or third party from NRS data	9
Newspapers	› As magazines above	9

Medium	Evidence	Score
Online display	› No single measurement tool (Comscore and Nielsen are main providers). Providers use different methodologies - mix of panel-based and cookie / logged in user measurement, but not fully independent (e.g. reliance on Facebook user data). Some third party governance, but no joint industry solution or approach. › UKOM (governed by IAB, AOP, ISBA and IPA) sets and governs the UK industry standard for online audience measurement but is not yet classed as a JIC. UKOM only oversees ComScore's methodology (IPSOS from 2021). Nielsen's methodology is approved by their Media Research Council (no transparency on members of the council) › ABC – digital verification › Post-campaign delivery reports available via media owner stats, agency ad server stats, as well as via independent third parties (e.g. audience verification, ad verification). Granularity and validity of these reports varies and is not standardized. From 2021, UKOM endorsed data will be capable of measuring the audience of advertising campaigns delivered online (tbc).	6
Online video	› See online display above › Broadcast VOD not currently measured by BARB. YouTube provides audience analytic tool › Post-campaign delivery – limited media owner stats only for Broadcaster VOD; for non-broadcaster VOD, with variable detail – via media owner stats, agency adserver stats, as well as via independent third parties (e.g. audience verification, ad verification)	5
Out of home	› ROUTE a Joint Industry Currency (JIC). Route is independent of any special interests. Its board of directors has an equal representation from the buyers and sellers of the medium. Methodology is transparent › Digital OOH relies on media owner logs to verify that copy was played and share of voice achieved. Route via the outdoor specialists, provides post-campaign delivery reports	9
Radio	› RAJAR Ltd (Radio Joint Audience Research) is a JIC and is jointly owned by the BBC and by the Radiocentre (the trade body representing the vast majority of Commercial Radio stations in the UK). Overseen by a board and a Technical Man-agement Group (TMG) made up of representatives of the BBC, commercial radio and the advertising community › RAJAR is survey-based, methodology is fully transparent › J-ET is the industry trading platform and provides post-campaign delivery reports	9
Social media	› Facebook/Instagram, Twitter all provide audience analytic tools, ComScore and Nielsen also cover social media audience measurement (see online display). No single measurement tool or JIC › Post-campaign delivery reports available via social media platforms own data or third parties (e.g. ad verification)	6
TV	› BARB is an independent JIC funded by the BBC and commercial broadcasters, methodology is transparent on website › BARB does not cover broadcast VOD. BARB project Dovetail currently in development will allow integrated audience measurement across TV, PC and tablet › BARB provides post-campaign delivery reports	9

About Ebiquity

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About Radiocentre

Radiocentre is the industry body for commercial radio. Radiocentre works on behalf of stakeholders who represent 90% of commercial radio in terms of listening and revenue.

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