WHAT'S HOT

March 2018

HELLO, ARE YOU LISTENING? NEW WAVE AUIDIO & THE VOICE ECONOMY

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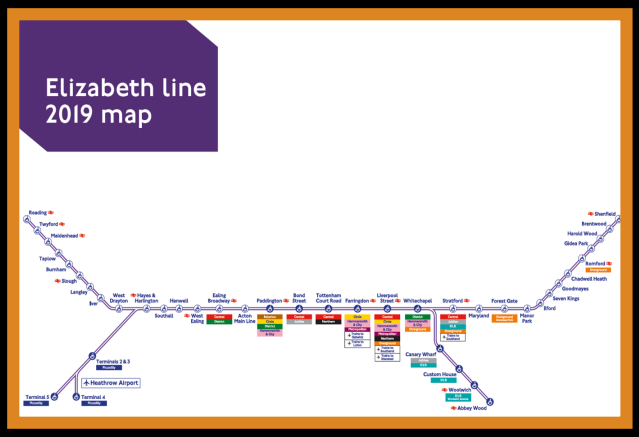
SADIQ SPEAKS: POLITICS AND PUBLISHERS AT SXSW

DIVERSITY: THE TOPIC DU JOUR AT MRS IMPACT



ALL ABOARD THE ELIZABETH LINE

IN CONNECTING THE WORLD, WHATSAPP REMAINS FACEBOOK'S MISSING LINK

HELLO, ARE YOU LISTENING? NEW WAVE AUDIO & THE VOICE ECONOMY

It wasn't so long ago that conversations were all about 'sound off and subtitles on', with social platforms seen as the most exciting new way to reach consumers.

However, developments in tech and trends in media consumption have combined to catapult us from this silent screen arena into a new voice economy powered by speakers. It's time for brands to say 'hello'.

Thanks to a few different factors, namely the growth of in-car DAB, the resurgence of the podcast and the birth of voice assistants, there are now more listening touchpoints than ever before.

From an advertiser's point of view, these tech developments build upon the established benefits of using radio in the comms mix (cost efficiency, ability to build an emotional connection, and flexibility) and layering in the additional advantages of incremental reach, sophisticated targeting and dynamic creative.

These new listening opportunities have kept audio consumption robust, with the average UK adult listening for 3hrs 9mins each day. While many predicted that new tech developments would lead to an ebbing away of the time spent with traditional media, the opposite has occurred for audio content.

Radiocentre research has found that the most common use of an Amazon Echo is to listen to radio or on-demand music services, with over two thirds using their speaker for this.

The opportunity posed by voice was raised at Advertising Week Europe this month by James Poulter, Head of Emerging Platforms at Lego, who asserted that "by 2020 most major brands will need some kind of audio or voice strategy in place, mainly because it's becoming the primary [online] access point for many people in the home around content overall".

It is now possible to target ads specifically to voice assistants via Global's DAX and 69 different Bauer Radio stations, and these platforms offer a particularly interesting opportunity as a new broadcast channel.

Research published by DAX last week found that two thirds of advertisers recognise this potential and plan to create ads specifically for voice-activated devices in 2018. Consistent sonic branding (straplines, music, and voice) across channels has been found to drive brand recognition and likeability – the question for advertisers is how to take these learnings and capitalise on the fact that they can now tap into a new listener interface which is embedding itself intimately into peoples' daily lives.

Voice now also goes beyond what a brand says in ATL advertising, and Poulter referenced the need for developing a 'brand presence' within audio. To reframe the importance of this, let's consider that historically a consumer would generally only look to speak to a brand to complain; customer service teams in call centres and in charge of community management for social platforms would be equipped with a brand bible which dictated tone of voice, but few brands had an established consistent audible voice.

Voice assistants now pave the way for positive one-to-one dialogue between a brand and a consumer, but the question is what does this sound like? Many brands who were first to market with creating their own Echo 'skill' have rushed onto the platform without creating a strategy to find and protect their brand's voice. This is a missed opportunity, proven by the fact that most branded skills use the generic 'Alexa' voice, and as such have lost out on the potential for a rich brand touchpoint.

With a rapt audience, there has never been a better time for brands to recognise the important of voice, not only within their ATL strategies but within the full marketing mix to protect brand equity long-term.

BLOCKCHAIN GANG: THE NEW WAVE OF CRYPTO START-UPS AND WHAT THEY CAN DO FOR MEDIA

Since we last wrote about blockchain in August, the technology has exploded as a martech buzzword, fuelled a cryptocurrency investment bubble (which subsequently burst) and has been hailed as the potential saviour of the NHS.

To recap, blockchain is an immutable, public, distributed ledger that allows transactions to be confirmed by a decentralised network of stakeholders. It therefore negates the need for a centralised arbiter or established trust between participants. It is impenetrably secure by design, meaning that entries cannot be modified or deleted, and the identity of participants is verified (but not necessarily disclosed) through public-key encryption.

Numerous start-ups are now emerging in this space, each offering a blockchain solution to one of several issues in the digital advertising industry.

MetaX has launched its Ads.txt Plus, which seeks to solve the issue of outdated records in standard ads.txt files. Measurement company Kochava has built XCHNG, a high-speed buying solution that aims to fully unify the concepts of blockchain and digital advertisers to the advantage of media buyers. NYIAX, which has been co-developed by Nasdaq, is the first blockchain-powered ad exchange, and is built on the framework that powers the financial stock exchange.

Without a doubt, the biggest issue in digital right now is the looming rollout of GDPR (General Data Protection Regulation) in May. Some are speculating that it might thwart months of progress in programmatic ad buying – but a start-up called MadHive claims that blockchain can offer its own solution to this conundrum.

The current model of housing user data in a central store may become less viable as users opt not to share their personal data with marketing and advertising companies. MadHive's solution is based on personal data being cryptographically sealed on a user's device, which "asks" for appropriate advertising rather than being pushed messages from a central adserver. This way, personal information need not be shared or stored externally, yet ads can still be relevant and appropriate for the user.

These are just a few examples, and in these early days we have yet to see which of them present viable long-term, meaningful solutions to martech issues – their potential impact is still debateable.

While we're excited about the prospect of blockchain, we're cautious; as with any technology, it's rare for the early adopters to be the eventual winners.

SADIQ SPEAKS: POLITICS & PUBLISHERS AT SXSW

Politics and media: the two just don't seem to be able to avoid each other these days. From the misuse of personal data and threats of advertising cuts to politicians talking at industry conferences, principles, politics and publishing have combined to hit the headlines again this month.

Hot off the heels of Unilever CMO Keith Weed talking at the IAB conference last month, where he warned technology firms that "Unilever will not invest in platforms or environments that do not protect children or which create division in society and promote anger or hate", Sadiq Khan has taken a similar strong stance.

Speaking at SXSW, Khan excoriated platforms such as Facebook and Twitter for fuelling societal divisions, expressing "growing concerns about the way some of the biggest companies on the planet are impacting our lives and the overall wellbeing of our societies".

He spoke of an "increase in disconnect and disillusionment" of many communities in Britain, fuelled by Brexit and powered in part by social media and the tech revolution.

Abuse of social data is another major concern raised this month, with Cambridge Analytica at the centre of allegations – the company being accused of using the personal data of 50 million Facebook members to influence the US presidential election in 2016. With the London-based consulting firm's offices having been searched by the UK's Information Commissioner, we could see Mark Zuckerberg, the owner of one of the biggest media platforms in the world, face serious consequences – and we're not just talking about the $37bn drop in Facebook's value to date.

Khan said: "Understandably, there are concerns about the ways some of the biggest firms on the planet are impacting our lives. These new platforms have been used to exacerbate, fuel and deepen the divisions in our community", adding that the issue "should worry democracies around the world".

He went on to say: "We simply must do more to protect people online. Facebook and Twitter and other platforms are finally starting to react to the criticisms. But with the skills and resources the companies have at their disposal, I believe it's possible to go further and faster."

Khan admitted that politicians have been sitting on their hands while the tech world has exploded around them, and said "we all placed too much faith in the vision of great tech pioneers". The stronger duty of care that he strives for will be the responsibility of governments and Silicon Valley working together for change.

If relationships can't be forged, Khan warned, tougher regulations similar to those Germany has recently put in place may be echoed worldwide, where tech firms which fail to remove content like hate speech now face hefty fines. But as a big proponent of free speech, the mayor doesn't back strict regulation.

He concluded: "The good news is that we're only just at the beginning of this journey and if companies and politicians at all levels of government can work together to shape the future of tech, then I remain optimistic that we can utilise technology to create more united cities and countries, and optimistic that we can work together to instil hope for a better, more inclusive future for us all."

To date we've seen these tech giants operate on their own terms, but with politics and big headlines involved, it's unlikely this will last much longer.

DIVERSITY: THE TOPIC DU JOUR AT MRS IMPACT

It's not quite up there with Glasto but MRS Impact – the Market Research Society's annual conference – is often a highlight in the calendar for researchers, advertisers and brands alike.

This year was no exception. Themed around 'Innovation, Inspiration and Integration', there was an emphasis on the importance of diversity and inclusion in the big business agenda. This made a welcome change from last year's fascination with Brexit.

The financial services sector, for one, demonstrated a clear concern with everything from the gender pay gap to the representation of minorities within advertising.

Ros King, Director of Marketing Innovation and Communications at Lloyds Banking Group was particularly articulate on the subject, sharing with the audience the process behind the successful 'By Your Side' campaign – a 60-second ad spot, running on TV alongside digital, print and outdoor, reiterating the group's support for British people and communities.

She also shared the business rigour behind what could be otherwise viewed as an advertising ploy. Her advice?

Expect backlash - but know you're doing the right thing.

One anecdote involved a far right group threatening to boycott Lloyds as a result of their advertising showing a man proposing to his (male) partner. Their response was to give full and clear details to the customer on the steps they needed to take to close their accounts.

Another brand which showcased an interesting use of 'real people' was BT Group. They outlined how the use of ethnographic research amongst the 'fringes' of modern Britain allowed them to create a storybook based on real events, from the Muslim family's Eid trip a funfair through to a grandad who spent his entire day Skyping his grandson. These heart-warming stories are the basis for their new brand creatives, and are ultimately driving the brand back into the nation's affections.

Be authentic – and tell a story.

This was also the approach Lucozade took with their Anthony Joshua creative back in 2017 ahead of his Klitschko fight. Rather than use their sponsorship in a traditional sense they spent a weekend in Dubai with AJ and his family, and realised that his story was not just his success as an athlete but the relationship he has with his mother, and how that has shaped him as a man.

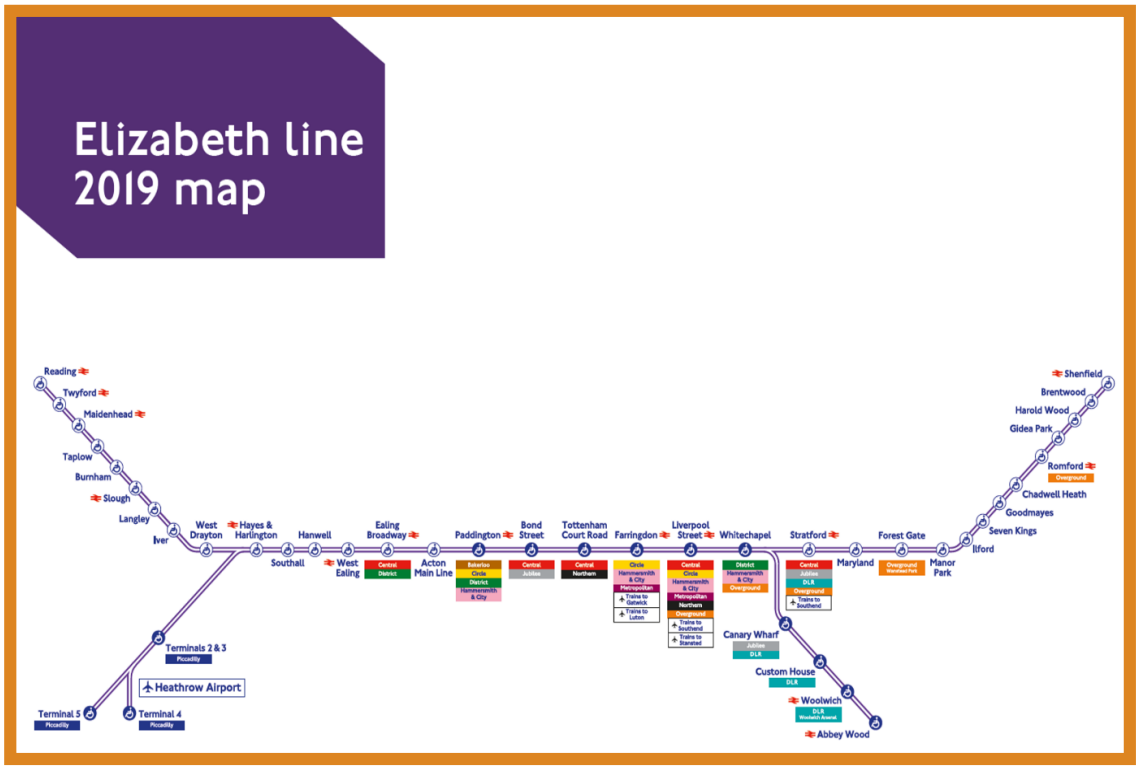
The execution was a roaring success, earning the creative team two Cannes Lion awards and boosting sales of Lucozade Sport significantly.

Great brands focus on product benefits not human deficits.

This came from a participant in Flamingo & The Age of No Retirement's study into the relationship between age and design principles. While attitude still overrides demographic, the idea that brands should direct their attention to what they can give the world (rather than negatively framing their audience as needing improving) was an interesting sentiment.

One thing is certain. Diversity is an agenda which isn't going away. From levelling the gender playing field to representing all walks of life in communications, it is no longer a token effort – but a business and brand imperative.

ALL ABOARD THE ELIZABETH LINE



First proposed in the 1970s, and with work starting in 2009, the 73-mile Crossrail project, now named the Elizabeth Line, is finally opening its full route to the public next year.

The line, running from Reading through central London and on to Shenfield, has cost nearly £15bn to construct, and will see the opening of nine new stations in central and outer London, serving as a new commuter route for millions of Londoners.

This month Transport for London (TfL) and commercial partner Exterion brought the proposition to market, with a unique approach to advertiser investment.

Rather than buying the route as part of the wider Underground network, brands will, at first, only be able to buy ad space on the Elizabeth Line through a partnership package.

At a proposed cost of £6.5m per advertiser, six launch partners are guaranteed sector exclusivity for the first 12 months of operation, as well as a proportion of the advertising estate on stations and trains (including large-format digital, small-format digital, digital escalator ribbons and train panels). Compared to the current TfL inventory, ad space will be high-tech and state-of-the-art, with 90% being digital panels.

Brands will also receive exposure through TfL's own website and marketing, with brand logos throughout, including a presence on all versions of the tube map.

The line will carry 200m passengers per year – comparable to the Victoria line, which is currently the sixth busiest line on the network. It will bring an additional 1.5m commuters to within 45 minutes of the city centre and will also be responsible for transporting tourists, expecting to carry a similar proportion of international travellers as the rest of the network (approximately 28%).

While Elizabeth Line sites will not appear on Route – the UK's outdoor audience measurement system – until mid-2019, it is estimated that in the first year it will reach 4.7m unique adults at a total OTS of 140.

Our view is that it is a difficult time to come to market with such a proposition. While the scale of investment means that it's likely this will be funded via a corporate sponsorship rather than media budgets, asking for this large a sum is ambitious. Recently, the openings of Heathrow T5 and T2 and the re-launch of the Piccadilly Lights all had difficulty finding long-term commitment. It feels likely that, ultimately, this will instead be sold as smaller chunks of inventory.

From a planning perspective, the audience can be reached more efficiently through other environments. However, this is a sponsorship opportunity, and the value potentially delivered through the association with the Elizabeth line and all it represents should be considered – investing in London and being at the centre of state-of-the-art infrastructure that will transform the way people move around the city.

Another consideration would be the management of the creative messaging throughout the day, week, and year to continually engage and entertain travellers.

If the rationale for investing in London in this way has appeal to an advertiser, and the creative and amplification mechanics can be realised, then there are few opportunities of this scale and stature.

Guest article published with thanks to Kinetic

IN CONNECTING THE WORLD, WHATSAPP REMAINS FACEBOOK'S MISSING LINK

In a month where Facebook has been under serious scrutiny, the Cambridge Analytica scandal may well have hidden another story around privacy and data protection. As a result of an investigation from the UK's data protection watchdog – the ICO - Facebook has been told that any sharing of user data across the two platforms would in fact be illegal.

Back in 2014, when Facebook acquired Whatsapp for a cool £19bn, the social network were actually fined a significant £94m by the EU, for their dubious ways of attempting to link user accounts. The EU stated: "It imposes a proportionate and deterrent fine on Facebook. The commission must be able to take decisions about mergers' effects on competition in full knowledge of accurate facts."

The fine was imposed because Facebook had knowingly misled the EU by denying it could link a user's identity across the two platforms, through their phone numbers. It was confirmed later, that Facebook executives in fact did know that this was possible and of course would have played a part in the business decision to go through with the merger.

Mark Zuckerberg, CEO and Founder of Facebook, has talked often and proudly about his desire to connect the world, although this desire has brought about an eco system where a user is not only connected to friends. Any person with an account will have their data linked across Facebook and Messenger, even phone calls and text messages have been logged, with data detailing to whom and at what time.

These connections have built a large and powerful dataset, where advertisers are more easily and granularly connected to potential audiences. Having the capacity to connect their 1 billion-plus Whatsapp users too, would give them an unprecedented advantage in an already un-diverse marketplace.

For advertisers, a potential link would likely be a positive move. Although Whatsapp won't be able to reverse their main USP of message encryption, being able to link people further through their connections within message groups will allow for larger and more personal networks to be created and understood.

Opening Whatsapp up to Facebook targeting and giving access to advertisers in another highly engaged platform, will understandably be desirable in a time where fewer people are accessing Facebook and spending less time when they do.

The GDPR ruling will begin to highlight how Facebook and Whatsapp can move forward and whether any further connections can be made. However, given recent scandals, they must be even more careful not to lose the limited consumer trust.

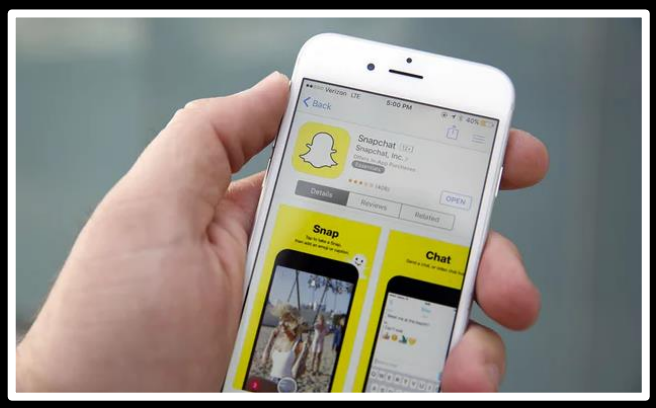
As users become more savvy, Facebook will need to give them a reason to stay, rather than force them to use rival platforms. Their goal must still remain to be connecting people to people, not just to advertisers.

HOTLINE

THE STORIES THAT LIT UP OUR MEDIA WORLD THIS MONTH

Channel 4 has reached a deal with the government to move hundreds of staff (38% of employees) out of London and create a new "national HQ" in another city – though the broadcaster will not sell its £100m base in London. A dozen cities and regions will be invited by the broadcaster to host its second HQ as Channel 4 opens three new "creative hubs" in order to create a branded national footprint. The plan also includes a commitment to spend half of Channel 4's total £700m annual programme budget on shows made by TV production companies based outside London by 2023 – the broadcaster currently spends £169m annually.

The popularity of Snapchat in Britain has led to the app forecasting it will bring in £181m in advertising revenue next year (it was just £21.9m in 2016), overtaking both Twitter's UK revenue and revenue from consumer magazine and cinema advertising within two years. The UK currently accounts for around 10% of Snapchat's global ad revenues, and by 2020 the app will make about £310m, making it larger than the roughly £300m digital and print ad spend on consumer magazines and a third bigger than the £200m cinema advertising market. Snapchat's growth is impressive, although it remains a small player in relation to the might of Facebook, owner of rival Instagram, which is forecasted to grow from a 4.9% share this year to an 8.1% share.



Vodafone and Nokia have teamed up to install the very first mobile network on the moon. As bizarre as this may sound, the self-titled 'PTScientists' (part-time scientists) who are working with the network providers have stated that moon-rovers would benefit greatly from switching communications to a 4G network over their current analogue-based system as it is far more energy efficient. This could lead to the first ever live HD video feed of the Moon's surface being beamed back to earth via a connected deep-space link in the near future.

In a truly 'end of an era' moment, the NME announced it has ceased publication in print after 66 years. The company now only exists online and will be swapping the print edition's cover star interview with a new weekly digital franchise labelled 'The Big Read'. Although since 2015 the publisher has been a free ad-funded magazine, the offline readership numbers were not high enough to facilitate the increasing production costs in a tight advertising market. The closure of the weekly came a week after publisher Time Inc. UK (which also publishes titles such as Marie Claire and Country Life) was sold to private equity group Espiris, with the new owner stating its aim to bring 'clarity and simplicity' to the magazine portfolio.

FACEBOOK DATA BREACH

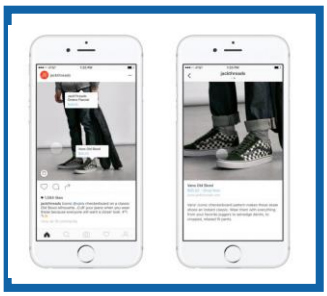
ADWEEK EUROPE

AWEUROPE

INTERNATIONAL WOMEN'S DAY

International Women's Day March 8 2016

INSTA SHOPPING



AUSSIE CRICKET TEAM

NME

NME