

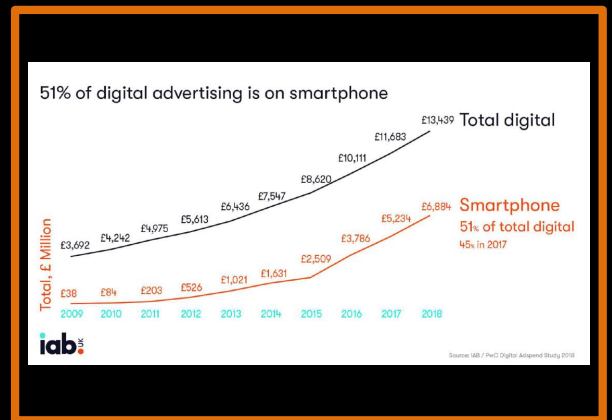
# WHAT'S HOT

May 2019





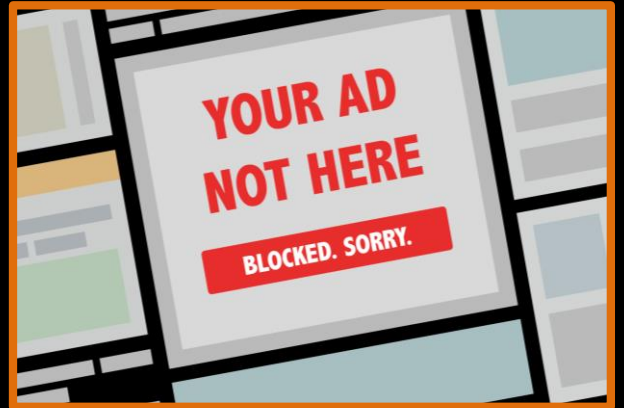
## MENTAL HEALTH AWARENESS WEEK



## IAB AD SPEND: MOBILE OVERTAKES DESKTOP



## JEREMY KYLE CANCELLATION



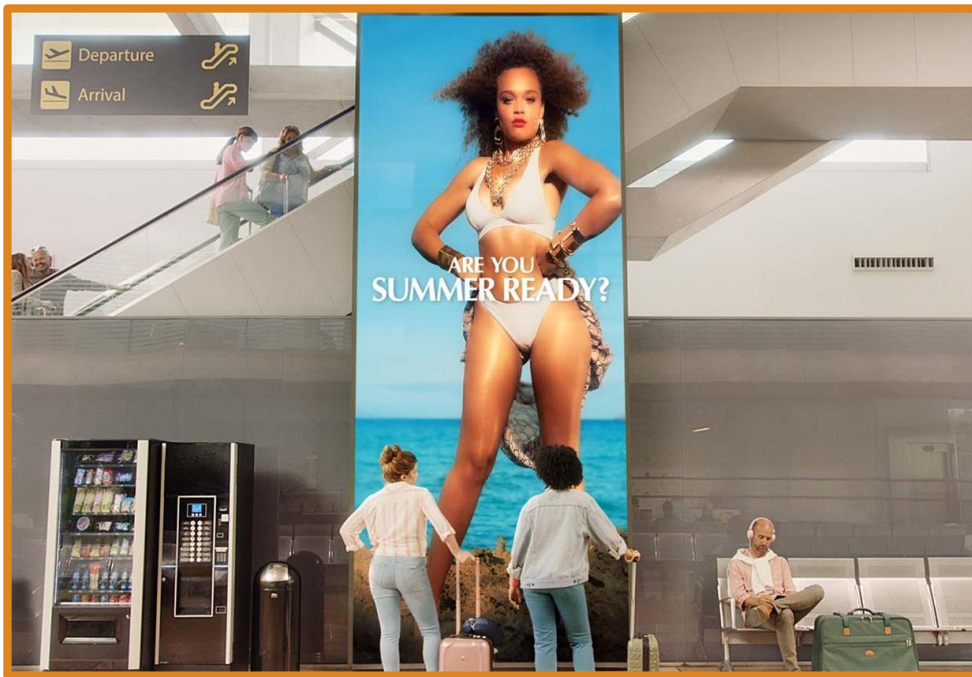
## TAKING STOCK OF AD-BLOCK



## CINEMA IS NOWHERE NEAR THE ENDGAME



# MENTAL HEALTH AWARENESS WEEK



With body image concerns causing a third of UK adults to 'feel anxious', and 1 in 8 having 'suicidal thoughts', a number of brands took a positive stance during Mental Health Awareness Week (13th-19th May).

Boots' summer campaign defiantly referenced 2015's notorious "Are you beach body ready?" campaign, with two friends mocking the 'perfect' body image traditionally associated with summer and swimwear advertising.

Advertisers are right to engage: 21% of those suffering anxiety cite body images used in ads as the cause while a further 22% cite body image on social media (rising to 40% among teenagers).

Mental Health Awareness Week saw a number of coordinated media campaigns. Coty and Wellman joined Harry's (a longstanding commentator on men's mental health) and ran media partnerships with The Book of Man (a new media brand which aims to celebrate a 'healthier form' of masculinity). Media brands are engaging too.

Having defined a wider business strategy around 'the power of positivity', magazine publisher Hearst has banned the use of negative language around body image across all their brands. Radiocentre organised a 'roadblock' message starring the Duke of Cambridge across 300 stations while The Guardian produced a

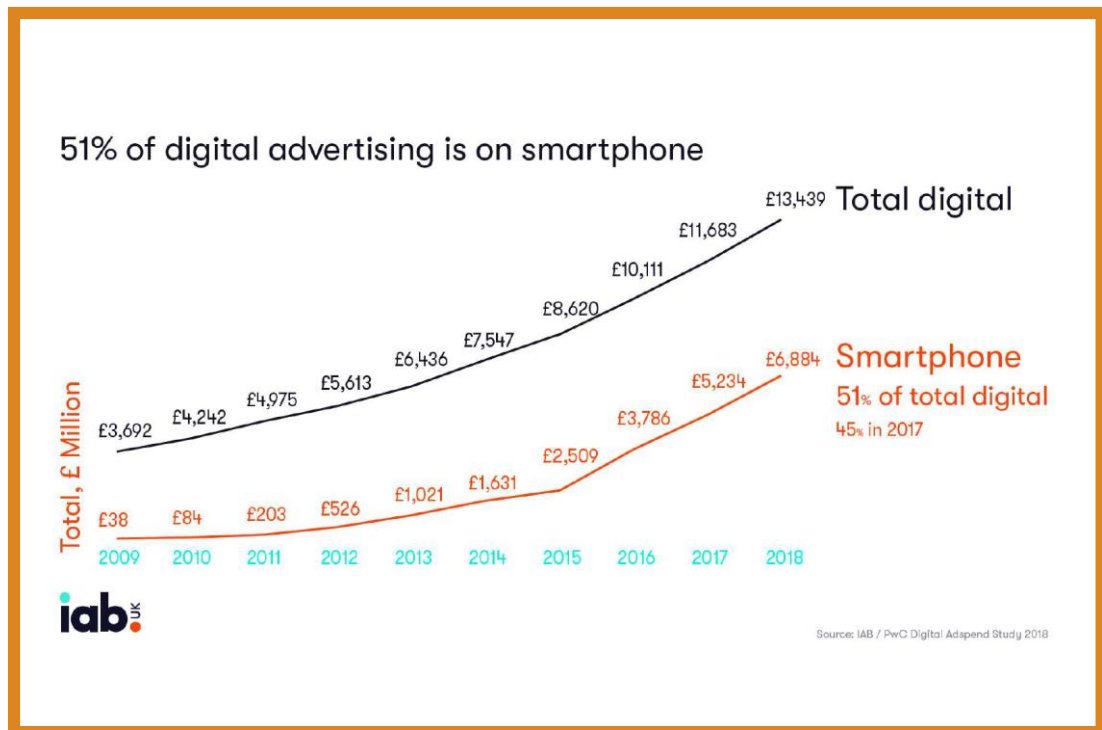
supplement focused on individuals' stories to highlight the support services available. A specially-commissioned 'locker room' focused on male mental health (also featuring the Duke) formed the centrepiece of the Football Association's Heads Up campaign, airing on the BBC as part of a week-long series of programmes. Similarly, Bauer's "Where's Your Head At?" campaign aims to lobby government to make changes to workplace culture.

Not every initiative was successful, however. The Prime Minister was accused of hypocrisy after lighting Downing Street green to commemorate the week, despite having made significant cuts to government funding.

As such, the businesses making real traction have committed long-term, and not just through marketing. We can't expect one week to rewire mental health awareness, but it's a good place to start.



# IAB AD SPEND: MOBILE OVERTAKES DESKTOP



Agencies and advertisers had been eagerly awaiting the latest release of the IAB's ad spend report for 2018: an opportunity to assess the health of the industry after a year of controversy. Mobile has suffered a reputational crisis - amid concerns over brand safety, ad fraud and the misuse of citizens' personal data.

Yet the results paint a picture of health and stability with mobile ad spend growing 31.5% year-on-year to overtake desktop for the first time and claim £6.88bn in UK advertiser spend.

A major factor is that audiences now spend more time on mobile devices than desktop computers. But behind that, mobile's real drivers have been social media and video: mobile video ad spend grew 45% YoY to account for 76% of all video spend, while mobile accounts for 80% of social media spend - at £2.5bn. Paid search remains flat, however, accounting for 49% of mobile ad spend, down from 50% in 2017.

Despite accounting for just 16% of all mobile display spend "standard display" still grew by 36%. Essentially a mix of tenancy and banner activity (including interstitials, the majority of which wouldn't pass the Coalition for Better Ads

standard) is seems many advertisers still favour quantity over quality and fail to put creative first in mobile advertising

Video ads should be mobile first, vertical and subtitled; and native units should continue to flourish both in and out of feed across social media, as developers update advertising options with product features.

Alongside software innovation, 5G may also present an opportunity to further improve mobile advertising and increase the value of a mobile impression by creating ad experiences that are more suitable for the environment - as data plans increase.



# JEREMY KYLE CANCELLATION



As ITV cancelled The Jeremy Kyle Show in May after a contestant died in a suspected suicide, it's been suggested that this has left an £80m hole in its advertising revenues. The talk show, which held a regular morning slot on ITV from 2005, saw host Jeremy Kyle and psychotherapist Graham Stanier discuss guests' personal issues in front of a studio audience.

Accounting for 13% of impacts across ITV2 and 3% on ITV (BARB Jan-April 2019), it was a commercial success: according to The Guardian's analysis, with a 30" spot on ITV1 costing an average of £12k, the show would have generated £328k a day, £6.9m a week and £83.6m a year, before taking ITV2 repeats into account.

With MPs such as Charles Walker MP stating the format was "not compatible with a responsible society and a responsible broadcaster" ITV has been praised for removing the show from all its stations, platforms, and YouTube. Replaced in the short-term with antique show Dickinson's Real Deal, which delivers just half the audience, ITV is expected to extend This Morning and start Loose Women earlier in the day, before launching a new replacement show in the autumn.

Whilst a significant change in the schedule, ITV is not expected to suffer commercially. Due to the way the UK TV trading market works, falling

audiences increases the costs of accessing airtime. And with new series of Britain's Got Talent (audiences up 7% YOY), Love Island, and The Rugby World Cup set to air in the next few months, ITV has plenty more to offer advertisers.

The issue has posed wider questions about the welfare of reality TV contestants, following the deaths of former contestants Sophie Gradon & Mike Thalassitis. The Love Island production team has announced new 'duty of care' guidelines ahead of the launch of its fifth series, where contestants will receive 'proactive contact' from the production team for 14 months afterwards.

Given TV's substantial reach, and the loyal audiences reality shows attract, it's commendable to see ITV take greater responsibility and acknowledge its influence on popular culture.



# TAKING STOCK OF AD-BLOCK



A recently completed audit by the Association for Online Publishing has found that ad-blocking fell to 10.3% last year, from 11.6% in 2017 and 12.5% in 2016.

Whilst encouraging news for publishers at face value, the financial impact continues to increase, with losses up by more than 30% due to the continued rise in online audiences (and available ad impressions).

Desktop ad-blocking has declined from 30% (H2 2016) to 20% (H2 2018), with Adblock Plus, the company behind the most-used ad-blocker, stating this is due to more people choosing to filter ads rather than block them entirely. Pop-ups on publisher sites asking users to turn off their ad-blocker, or those that prevent access entirely until the ad blocker is turned off, also appear to be working. Audiences increasingly accept the value exchange of good-quality, non-intrusive ads for free content on premium publisher sites.

Ad-blocking on mobile has grown but on a smaller scale and from a smaller base, doubling from 1.2% to 2.4% between Q4 2017 and Q4 2018, a figure that we can expect to rise as users demand

increased privacy protection and control over their browsers. Alternative browser Brave, with built-in ad blocking, continues to grow in popularity, passing 10 million Android downloads in Jan 2019.

While the prevalence of ad-blocking is slowing, it remains a concern for publishers. Already significant losses may widen with new updates to Chrome and Safari - and the launch of Apple's anti-tracking software ITP 2.2 later this year.

Publishers should take note of the lessons learnt on desktop and focus on creating ad experiences that are as high-quality and non-intrusive as possible, whilst being transparent and open with their audiences about the benefits of an ad-supported business model.



# CINEMA IS NOWHERE NEAR THE ENDGAME



Avengers Endgame has been a huge commercial success, smashing multiple box office records. It became the 17th highest grossing film of all time, after just five days.

Far from a lone success story, this is just one example of an industry in rude health with successes in multiple genres. IT (2017) is the biggest box office horror film of all time, Frozen (2013) the biggest family release of all time, and Deadpool 2 (2018) is the highest-grossing R-rated movie of all time.

While streaming is changing the entertainment business, its effect on cinema is seemingly non-existent. You could infer the two have little causality on the other: people still want to view films on the big screen.

Cinema's growth can be put down to multiple reasons. Firstly, franchises are going from strength-to-strength with Marvel Cinematic Universe, for instance, building a mixture of hardcore and casual fans. Driven by hype and word-of-mouth, blockbuster releases become events in their own right; specialist event cinema such as Rooftop Cinema & Secret Cinema also benefiting from the growing 'experience economy'.

Many are unprepared to wait for home releases in fear of missing out, while fear of spoilers is thought to be behind 19 of the top 20 biggest all-

time opening weekends happening in this decade.

Finally, it is worth mentioning the increase in both the quantity and quality of UK cinemas. There are more chains catering for affluent audiences (Everyman & Curzon), while events such as baby-friendly screenings & theatre showings are bringing wider audiences into multiplexes.

Cinema has always been seen as an effective way to add incremental reach onto TV campaigns. But the channel offers advertisers more versatility and as admissions grow and franchise blockbusters become more commonplace, cinema will gain greater prominence in the advertising mix.



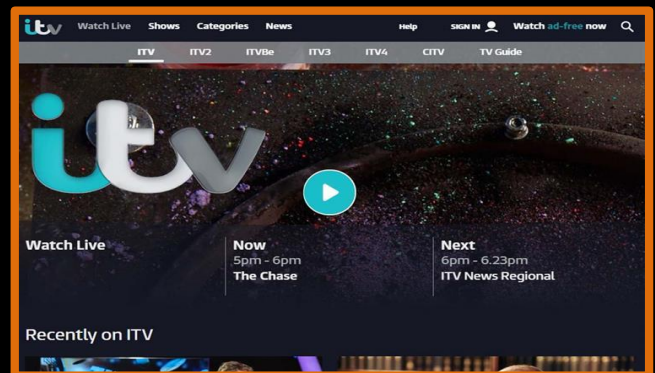
# HOTLINE

THE STORIES THAT LIT UP OUR MEDIA WORLD THIS MONTH



Virgin Radio published its first set of results since launching The Chris Evans Breakfast Show. The station's weekly reach increased by 191% quarter on quarter to 1.3m, while the show itself achieved a weekly reach of just over 1m. A promising start (Chris Moyles on Radio X has 928k weekly reach), but Virgin Radio trails industry leader Kisstory's weekly reach of 1.8m.

The Advertising Association and Warc have optimistic growth prospects for ad spend around broadcaster video-on-demand. In their latest forecast, the AAWarc said BVOD expenditure was likely to rise by 26.3% (vs. its previous 9.5% prediction) in 2019 - upweighting its forecast after speaking to industry stakeholders.



To coincide with the release of John Wick 3, Epic games has allowed players to unlock a customisation options in the popular online video game Fortnite, such as allowing the assassin to become a character in the game. New challenges incorporated in the game replicate those in the movie, for example the more enemies you kill, the more visible you become to other players.

Facebook will launch WhatsApp ads in 2020 as part of the app's 'statuses' feature. Like Instagram Stories, Statuses take up an entire screen when clicked, and allow users to "share text, photos, videos and animated GIFs that disappear after 24 hours". The name of the advertiser will be placed where the name of the contact sharing content would otherwise appear.





ROYAL BABY ARCHIE

BLACK MIRROR

BLACK MIRROR  
SEASON 5



MAN CITY  
FOURMIDABLES

EU ELECTIONS



HUAWEI

GAME OF THRONES  
REVIEWS

