World News Media Congress

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WFA represents over 90 of the world’s biggest brand owners...and 60 national advertiser associations on six continents.
We’re a privately held, diverse, and growing

FAMILY OF COMPANIES

11 Billion Dollar Brands
35 Billion Dollar Revenues
In 2013, digital media consumption overtook traditional media consumption.

Media time by channel in 2017:

- **Digital**: $204 billion (38%)
- **TV**: $184 billion (34%)
- **Newspapers**: $54 billion (9%)
- **Outdoor**: $37 billion
- **Radio**: $34 billion
- **Magazines**: $28 billion

Source: GlobalWebIndex, WFA
In 2013, digital media consumption overtook traditional media consumption – in 2017 media time by channel looked like this.

Source: GlobalWebIndex 2013 and 2017
Most people are OK with ads

Read as: Seventy-nine percent of persons 18-34 say ads are necessary.
Source: Nielsen Millennial Report/Custom Survey, Harris Online Panel 2/18/16-3/7/16
Digital is now biggest global marketing channel

Digital $204 billion (38%)

TV $184 billion (34%)

Newspapers $54 billion (9%)

Outdoor $37 billion

Radio $34 billion

Magazines $28 billion

Source: Zenith, December 2017
How much does the digital advertising ecosystem cost?

- Client investment: 100%
- Agency Of Record (AOR): 5%
- Trading Desk: 15%
- Demand Side Platform (DSP): 10%
- Data, Targeting & Verification: 25%
- Exchange: 5%
- Publishers (0% fraud): 40%
- Publishers (10% fraud): 36%
- Publishers (30% fraud): 28%
- Ad fraud (additional 'non-working media'): 12%
WFA ‘Principles for partnership’...

1. **Transparency** throughout the supply-chain
2. Zero tolerance to ad fraud (with compensation for any breach)
3. Strict **brand safety** protection
4. Minimum **viewability** thresholds
5. **Third party** verification and measurement as a basic
6. Removal of ‘walled garden’ & data portability issues
7. Improving standards with **data transparency**
8. Improved **user experience**
Digital Duopoly

Source: WARC (2017)
Ad-blocking is on the rise

11%

Of the global internet population is blocking ads on the web (Dec 2016)

30%

Annual rise in ad-blocking

Source: PageFair, 2017, Link
The Coalition for Better Ads - slowing the rise of adblocking by improving the online ad experience

• Based on research to identify people’s experience of different formats.

• Entire ad ecosystem to take action based on that data in order to stop the worst practices

• « Better Ads Standards » are the results of this process
‘Better Ads Standards’ on Desktop Web – 4 formats

- Pop-up Ads
- Prestitial Ads w/ Countdown
- Auto-Playing Video Ads w/ Sound
- Large Sticky Ads
‘Better Ads Standards’ on **Mobile Web** – 8 formats

- Ad Density higher than 30%
- Postitial Ads w/ Countdown
- Large Sticky Ads
- Full-Screen Scrollover Ads
- Pop-up Ads
- Flashing Animated Ads
- Auto-Playing Video w/ sound
- Prestitial Ads
There is a problem with trust in news and information, but especially platforms

- 57% of people globally do not trust the media
- 7 in 10 people globally worry about false information or fake news being used as a weapon
- 50% of people globally are disengaged – they consume news less than weekly

Source: Edelman Trust Barometer
GDPR-like rules are emerging around the globe

- **Canada** — Digital Privacy Act 2015
- **EU** — GDPR (May 2018)
- **Russia** — Personal Data Protection Act 2006, revision launched 2018
- **China** — Personal Information Security Specification (1 May 2018)
- **South Korea** — Personal Information Protection Act (PIPA) 2011
- **Japan** — Act on the Protection of Personal Information (amended 2017)
- **New Zealand** — Privacy Act 2011, revision launched 2018
- **Brazil** — Data Protection Bill, expected adoption 2018
- **India** — proposal expected in 2019
- **Australia** — Privacy Act (amended 2014)
- **South Africa** — Protection of Personal Information Act, expected to apply 2018
- **Chile** — New Data Protection Act, proposed April 2018

Additional countries marked with GDPR level (or similar) and Towards GDPR.
Accountable Actors Are Needed