



Empowering your media business

2020 Digital Advertising Trends:

PREDICTIONS FOR PUBLISHERS

in partnership with America's Newspapers





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Why It Matters



Methodology



01

Reviewed "10 Digital Advertising Trends to Look for in 2019"



02

Lineup product experts drafted 2020 list



03

Talked to our customers

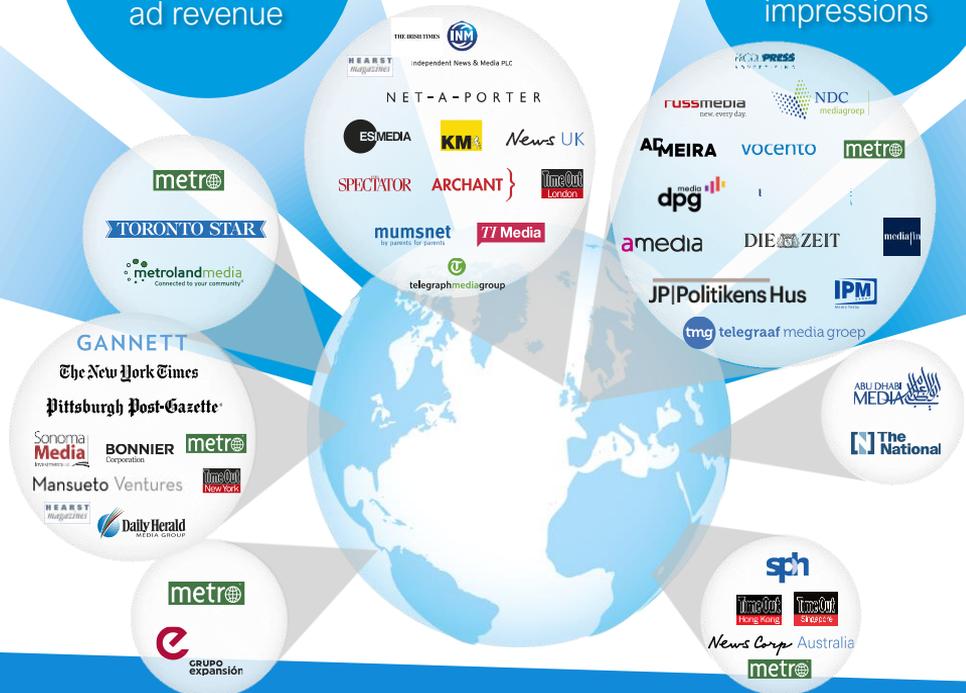
World Leader in Advertising Sales Solutions

6,700+
media properties

\$33bn
in billed
ad revenue

132bn
digital
impressions

670m
ad circulation
reach



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Handed over to an independent researcher

AI Will Deliver ROI for Publishers and Advertisers



News UK

JAMES

the “Digital Butler,”
recommendation bot

70%

of readers are
clicking on
suggested stories

49%

decrease in
subscription
cancellations

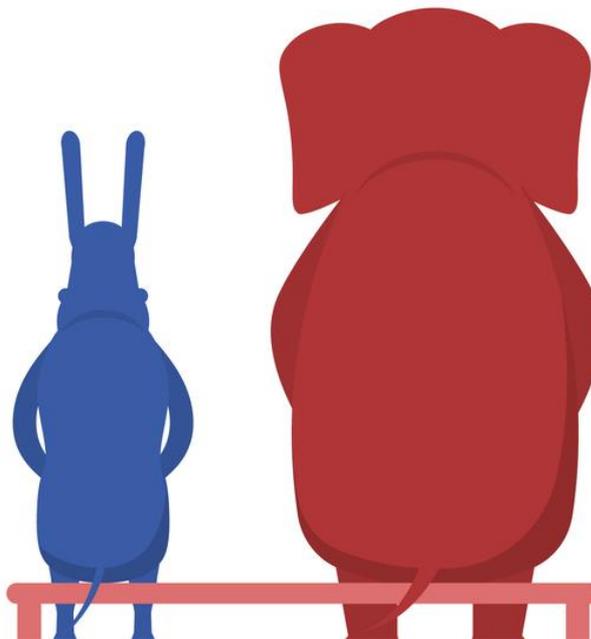
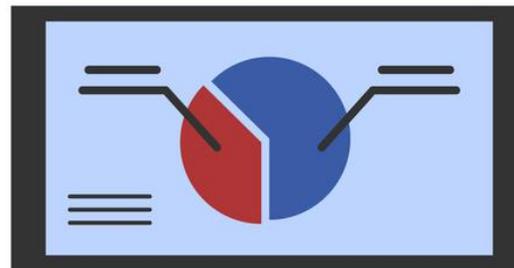
Political Spend on Digital Will Skew Advertising Patterns



Political ad spend is set to reach a record \$6 billion in 2020



Digital media will see the most significant increase in spend, with a projected \$1.2 billion price tag



Publishers Will Jump on the Voice Search

Train Question Phrases are More Likely to be Voice Search



Growth in Question Phrases Year Over Year



Search Engine Watch, Jason Tabeling, "How Will Voice Search Impact A Search Marketer's World?" December 2014.



In 2020, voice searches are expected to make up HALF of all online searches



Remember Google snippets?



Critical to answer questions with your content – who what when where why, the stuff of journalism



Voice content needs to be enabled and optimized

Short-Term Data Privacy Pain Will Lead to Long-Term Gains



Third Party Data

CCPA & GDPR mean a shift away from third party data to first party data



Targeting

Shift to contextual targeting, reducing the need for so much personal data, cookie tracking



Upside

Good News = Purchase Intent Increases of up to 63%



Publishers Will Band Together to Compete with Walled Gardens

- **63¢** of every advertising dollar in the US go to Facebook and Google
- WHY? It's easy.
- **But publishers CAN be competitive:**
 - Local media receives **3X higher consumer trust** compared to platforms like Facebook.
 - Top 3 organic results on Google still get 75% of clicks.
 - Collaboration works! The Ozone Project gets more unique impressions than Google & Facebook combined in the UK.



For More Information

"How To Compete With Big Tech: 4 Strategies To Win More Sales"



Personalization Will Become Increasingly Innovative



90%
of online advertisers use some sort of personalization



With data privacy laws, publishers will have to get creative



Hearst is even experimenting with personalization in PRINT –
matching what you read online with what you receive in your mailbox

Podcasts Will See Increased Programmatic Spend



42%

of all Podcast ads are added in **AFTER** Download



Growth

One of the fastest-growing segments of programmatic, expected to grow to \$1.6 million by 2022



The Streaming Video Bubble Will Continue to Grow

74%

Of American consumers above age 13 watch streaming or online video at least weekly

41%

Are daily viewers

78%

Of online video viewers will consume ads in exchange for free content





Streaming Audio Will Become More Measurable

- This year the audience will surpass radio for the first time
- Problem with audio has always been reporting – until recently
- Single identity, from your car to your phone and your smart speaker

Publishers' Creative Subscription Offerings Will Grow



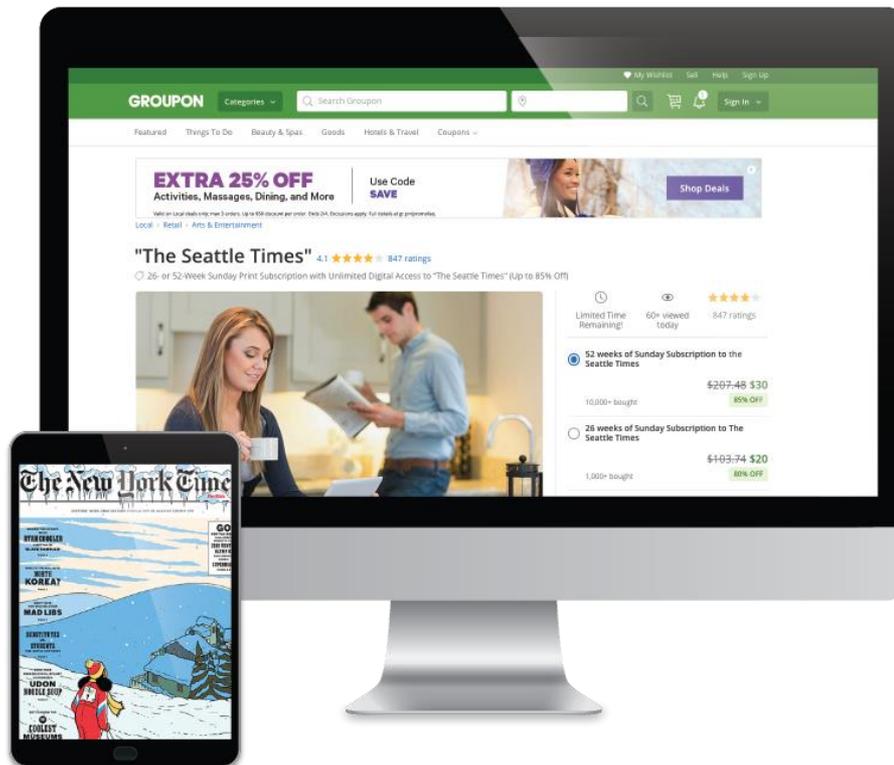
Leveraging psychology to make their subscription offerings work (Humans love subscriptions – we also love personalization & discounts)



NYT for kids



Seattle Times on Groupon



Three Takeaways

01

Understanding your audience is critical – both for advertising and subscription revenue.

- Artificial intelligence & first-party data enable personalization, which reduces churn and increases engagement.

02

Publishers must meet audiences where they're at

- Voice search and streaming audio & video are increasing in convenience and popularity – this is where your audience is, make sure your content is accessible in these formats!

03

Publishers can compete with Big Tech, if they're willing to:

- Sell the value of trustworthiness
- Be easy to do business with
- Collaborate with one another



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How We Can Help



Enable audience-based sales strategies & better lead generation



Show you how to better understand and manage your audience



Supply managed services so you can focus on innovation & journalism



Questions?

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