PRESS CONFERENCE
15 June 2022

1st Study of Media Effectiveness on Search
THE SPEAKERS

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COO Publicis France
CEO Publicis Media

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President of the Audience Committee of ACPM
General Manager of 366

Denis GAUCHER
Executive Managing Director,
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Adjoint General Manager
Bayard Média Développement
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Director ACPM Audience
which aims at controlling and certifying the Circulation of the Press and the Audience figures of different websites, online radio stations, podcasts, display ads and various magazine and newspaper brands

#DemainLaPresse
1. KEY LEARNINGS FROM THE PREVIOUS STUDY
PRESS EFFICIENCY

KEY LEARNINGS FROM THE 1ST STUDY IN 2021

• The **Press** is the 2nd largest contributor to sales within media levers in the 5 sectors studied*.

• 1€ invested = 5.7€ in revenue on average over the 5 studied sectors (Automotive, Cosmetics, Luxury, FMCG, Telecommunications).

• **Press** investments are efficient both in the **short-term** and the **long-term**.

• **Proven synergy effects** with other media levers which boost the overall campaign ROI.

• Efficiency was proven for **all types of advertisers** (small, medium and big announcers).

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* Levers included in the scope: TV, Press, Social, Display, OOH, Movies, Online, Video, OOH, Radio and Cinema.

* 5 sectors: Automotive, Cosmetics, Luxury, FMCG, Telecommunications / Average of all media over the 5 sectors.
PRESS, A LEVER BALANCED BETWEEN SHORT-TERM AND LONG-TERM EFFICIENCY

**PRINTED PRESS**

R.O.I. short-term \( \times \) LT Multiplier \( = \) Total R.O.I.

<table>
<thead>
<tr>
<th>R.O.I. short-term</th>
<th>LT Multiplier</th>
<th>Total R.O.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.6</td>
<td>1.75</td>
<td>6.2</td>
</tr>
</tbody>
</table>

**DIGITAL PRESS**

<table>
<thead>
<tr>
<th>R.O.I. short-term</th>
<th>LT Multiplier</th>
<th>Total R.O.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.2</td>
<td>1.1</td>
<td>4.6</td>
</tr>
</tbody>
</table>

**PRESS CONSOLIDATED**

Total R.O.I. \* 5.7

For every invested euro, 5.7€ generated in additional sales

Complementary effects with a short-term impact for the digital press and a very powerful long-term impact for the printed press.

*5 sectors: Automotive, Consumer, Leisure, FMCG, Tech (average over the five sectors)
# COMEBACKS FROM THE SEASON 1 #DEMAINLAPRESSE

## WHY A SEASON 2?

### A successful season 1

1. Quantify and prove the impact of the press on the brand's business
2. Contextualize and share the best practices in the market
3. Exchange and enrich the practices of the market players

### Key questions that emerged

1. What impact does the press have on online searches?
2. Why should we continue to invest in branding via the press?
3. Would it be relevant to increase media investments to increase the volume of brand related queries?

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_The question we answered:_

What is the impact of media levers and their messages on the volume of brand queries?
SEARCH, A PIVOTAL ELEMENT IN THE PURCHASING PROCESS

- **Driver for e-commerce** with a turnover in 2021 of *30 billion €*.

- **Driver for physical sales** 86% of consumers get information on the Internet before buying in a store*.

*Source: *Fevad **OpinionWay by Akeno May 2021*
2. FIRST ECONOMETRIC STUDY IN EUROPE OF MEDIA EFFECTIVENESS ON SEARCH
DATA MODELING

24 Database used: based on key-words

3 sectors targeted
7 brands per sector

Collection of key-words

Selection of key-words

Database consolidation

Prerequisites:
- Data: analysis 2020 - 2021
- Data sources: McKinsey & Kester

AUTOMOTIVE

• Identification of search engine queries associated with selected brands in the 3 sectors
• Collection of the volumes of these queries over 2 years (2020-2021)

BANK & INSURANCE

• Selection of the 700 most searched keywords by brand during the analysis period (2020-2021)

LUXURY

• 3 sector databases (one per sector)
• 21 individual databases (one per brand)
DATA MODELING

MEDIA LEVERS ANALYSED IN THE STUDY

Press (Printed and Digital)

TV

AUTRES MÉDIAS

Radio

OOH

Display

Cinema
**1st Key Indicator: Contribution**

**Contribution of Media Activity**

Number of searches generated by the activation of a media lever

Example: breakdown of the number of searches

**Contribution of the Different Media Levers**

**Press Contribution**

\[
\text{Press Contribution} = \frac{\text{Number of searches generated by the press}}{\text{Number of searches generated by all media channels}}
\]

Weight (in %) of a media lever on the number of searches generated by the total media activation

\[
\% \text{ Contribution of the Press} = \frac{\text{Contribution of the Press}}{\text{Number of searches generated by all media channels}}
\]

Example decomposition of the contribution by media:
RETURN ON INVESTMENT (R.O.I.)

Performance measure used to evaluate the effectiveness of an investment.

\[
\text{R.O.I.} = \frac{\text{Correlation in number of searches generated}}{\text{Investment in € (gross)}} \times 1000
\]

An R.O.I. of 60 represents 60 searches generated by a media lever for 1,000€ invested.
MESSAGE TYPES: BRAND AND PRODUCT

BRAND
Advertising creation within media highlighting the brand of an advertiser.

PRODUCT
Advertising creation within media highlighting the product of an advertiser.
MARKETING MIX MODELING METHODOLOGY WAS AUDITED

At the request of the ACPM, Google, the SNPTV and the Union des Marques, the CESP conducted in 2021 for the 1st time the audit of the Marketing Mix Modeling studies of Ekimetrics.

«We considered the CESP audit essential to give credibility to Ekimetrics approach and results, both for our members and for the markets.»

Stephane Jouvet — General Director ACPM
3. A BROAD SPECTRUM OF EFFECTIVENESS: AUTOMOTIVE
## Automotive
### Brand Campaigns at the Heart of Drive to Search

Brand messages are 3 times more effective than Product messages

<table>
<thead>
<tr>
<th></th>
<th>Share of investments</th>
<th>Share of contributions</th>
<th>Media R.O.I.</th>
<th>Press R.O.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brand</strong></td>
<td>33%</td>
<td>60%</td>
<td>44</td>
<td>88</td>
</tr>
<tr>
<td></td>
<td>for every 1,000€ invested 44 searches are generated</td>
<td>for every 1,000€ invested 88 searches are generated</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>67%</td>
<td>40%</td>
<td>15</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>for every 1,000€ invested 5 searches are generated</td>
<td>for every 1,000€ invested 26 searches are generated</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**AUTOMOTIVE**

**PRESS IS THE MOST EFFECTIVE LEVER**

1/3 of media contributors for 17% of advertising investments. The press has an R.O.I 2 to 3 times higher than other media.

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**R.O.I / Contribution / % investment by lever**

- **Printed Press:** R.O.I = 47
- **Digital Press:** R.O.I = 55
- **TV:** R.O.I = 21
- **Other Media:** R.O.I = 18

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*Size represents the share of investments.

R.O.I**: Number of searches generated by a media lever for 100€ invested.

**Share of investments**
AUTOMOTIVE
PRESS BRAND MESSAGES HAVE THE HIGHEST PERFORMANCE

Press Brand generates nearly 1/4 of the contributions and is thus the leader in R.O.I. with only 6% of advertising investments.
AUTOMOTIVE

LOW SATURATION LEVELS ON MEDIA PERFORMANCE: THE VOLUME OF WEB SEARCHES IS PROPORTIONAL TO THE MEDIA'S ADVERTISING INVESTMENTS

Share of contribution of media levers by brand

- Brand 1
- Brand 2
- Brand 3
- Brand 4
- Brand 5
- Brand 6
- Brand 7

From the best-selling to the lowest-selling brand in France in 2020

*All the brands that were studied are anonymized

Market leader
AN INCREASE IN MEDIA INVESTMENT SHOULD BE PRIORITIZED IN THE PRESS TO INCREASE THE VOLUME OF BRAND SEARCH QUERIES

If media investments are increased by +10% in Printed Presse Brand, the number of search queries will increase by +4.6%.

ACPM

Ekimetrics.
KEY LEARNINGS - AUTOMOTIVE

- Traditional media levers contribute to 16% of the brand's search volume.

- Press levers contribute 5% or 1/3 of the media contribution.

- Press: 1/3 of media contributions with only 17% of advertising investments.

- Brand messages have an R.O.I. 3 times higher than freestyle messages R.O.

- To generate drive to search brands, focus on Printed Press Brand, Digital Press 3 and or TV 3 and.
4. A BROAD SPECTRUM OF EFFECTIVENESS: BANKING / INSURANCE
**BANKING / INSURANCE**

**BRAND MESSAGES ARE 3 TIMES MORE EFFECTIVE THAN PRODUCT MESSAGES**

While only 12% of advertising spend is on brand messages, they generate 28% of brand searches.

<table>
<thead>
<tr>
<th></th>
<th>Share of investments 'allocated'</th>
<th>Share of correlations 'with media correlations'</th>
<th>Media R.O.I.</th>
<th>Press R.O.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brand</strong></td>
<td>12%</td>
<td>28%</td>
<td>164</td>
<td>188</td>
</tr>
<tr>
<td></td>
<td>on every €1,000 invested, 167 searches are generated.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>88%</td>
<td>72%</td>
<td>56</td>
<td>47</td>
</tr>
<tr>
<td></td>
<td>on every €1,000 invested, 56 searches are generated.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACPM

Ekimetrics.
**Banking / Insurance**

Regardless of the brand size, brand messages are always more effective than product messages.

*All the brands that were studied are anonymized.*
BANKING / INSURANCE

THE PRESS HAS THE 2ND HIGHEST CONTRIBUTION AND R.O.I.

With an equivalent amount of advertising investment, the Press has higher contribution and R.O.I. than Other Media.

R.O.I. / Contribution / % investment by lever

<table>
<thead>
<tr>
<th>Media</th>
<th>R.O.I.*</th>
<th>% Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed Press</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Digital Press</td>
<td>59</td>
<td></td>
</tr>
<tr>
<td>TV</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td>Other Media</td>
<td>48</td>
<td></td>
</tr>
</tbody>
</table>

Note: Size represents the share of investments. R.O.I.*, Number of searches generated by a media lever for 1,000€ invested.
BANKING / INSURANCE

PRESS BRAND IS THE MOST PROFITABLE MEDIA, BUT IS UNDER-INVESTED

This lever has by far the highest R.O.I., while the Press Brand represents only 4% of media investments.
LOW SATURATION OF MEDIA EFFECTIVENESS IN THEIR CONTRIBUTIONS TO BRAND RELATED QUERIES

Little saturation in terms of media performance, the higher the investment and the greater the contribution to the volume of searches (with an effectiveness that decreases only slightly with the increase of the investment).

Share of contribution / investment of traditional media levers by brand

*All the brands that were studied are anonymized

Market leader
BANKING / INSURANCE
PRINTED PRESS BRAND IS 3 TIMES MORE ELASTIC THAN THE AVERAGE MEDIA

ELASTICITY OF DRIVE TO SEARCH BRAND

If media investments are increased by -10% in the Printed Presse Brand, the number of search queries will increase by +1.5%.
KEY LEARNINGS - BANKING & INSURANCE

- Traditional media levers contribute to 16% of brand search volume.

- **Presse Brand has the highest R.O.I.** even though TV has the highest investments and contributions.

- 3rd-party messages are underinvested in the industry, only 12% of total investments.

- 3rd-party messages are 3 times more effective than product messages in generating Brand Drive to Search.

- To generate Drive to Search brand, focus on **Printed Press Brand**, **Digital Press Brand**, or **TV Brand**.
5. A BROAD SPECTRUM OF EFFECTIVENESS: LUXURY
ONE IN TWO WEB SEARCHES ON THE BRAND ACTIVATED BY A BRAND MESSAGE

3/4 of the investments are Product messages but almost half of the contributions come from Brand messages.

<table>
<thead>
<tr>
<th></th>
<th>Part des investissements / Share of investments</th>
<th>Share of contributions / Share of media contributions</th>
<th>MeDia R.O.I</th>
<th>Press R.O.I</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brand</strong></td>
<td>26%</td>
<td>46%</td>
<td>81</td>
<td>92</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>for every € 1,000 invested, 81 searches are generated</td>
<td></td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>74%</td>
<td>54%</td>
<td>34</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>for every € 1,000 invested, 34 searches are generated</td>
<td></td>
</tr>
</tbody>
</table>

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Ekimetrics.
LUXURY

THE PRESS IS BY FAR THE MOST CONTRIBUTING MEDIA AND HAS THE HIGHEST R.O.I., BOTH IN PRINTED AND IN DIGITAL FORMATS

The press represents 2/3 of the contributions to Search_Luxe

R.O.I. / Contribution / % investments per lever

- Printed Press: 46%
- Digital Press: 38%
- TV: 16%
- Other Media: 32%

R.O.I.*

- Printed Press: 66
- Digital Press: 69
- TV: 28
- Other Media: 32

*T: Number of searches generated by a media lever for 1 000€ invested

** Share of investments
PRESS BRAND MESSAGES HAVE BOTH VERY HIGH R.O.I. AND HIGH CONTRIBUTION

The Press Brand generates 40% of contributions and has the best R.O.I. before the other media with only 20% of advertising investments.
MEDIA EFFECTIVENESS ACTIVATED BEYOND THE MINIMUM THRESHOLD OF 17% OF MEDIA INVESTMENTS

*All the brands that were studied are anonymized

Market leader
LUXURY

PRINTED PRESS WITH BRAND MESSAGES PERFORMS TWICE AS WELL AS THE AVERAGE OF OTHER MEDIA

ELASTICITY OF DRIVE TO SEARCH BRAND

If media investments are increased by +10% in Printed Presse Brand, the number of search queries will increase by +2.5%.
KEY LEARNINGS - LUXURY

• Traditional media levers correspond to 17% of brand search volume.

• Press events have contributed to 41% of the total volume of queries, this represents 2/3 of the total media contribution.

• Press is the most invested lever, the highest contributing one and the most efficient lever to generate brand-related search queries.

• « Brand » messages have an ROI 3 times higher than « Press » messages.

• To generate Digital Search brand, focus on Printed Press Brand, Digital Press Brand or TV Brand.
6. CONCLUSION
CONCLUSION

PRESS R.O.I. ON BRAND RESEARCH

**AUTOMOTIVE**

<table>
<thead>
<tr>
<th>48</th>
</tr>
</thead>
<tbody>
<tr>
<td>For every £000K invested, 48 search ads are generated</td>
</tr>
</tbody>
</table>

**BANKING & INSURANCE**

<table>
<thead>
<tr>
<th>66</th>
</tr>
</thead>
<tbody>
<tr>
<td>For every £000K invested, 66 search ads are generated</td>
</tr>
</tbody>
</table>

**LUXURY**

<table>
<thead>
<tr>
<th>67</th>
</tr>
</thead>
<tbody>
<tr>
<td>For every £000K invested, 67 search ads are generated</td>
</tr>
</tbody>
</table>

- Automotive is the sector where the media is most effective in generating brand search volume.
- In the Banking and Insurance sector, brand messages are not played very often, which explains why the contribution of the media to the volume of Search 3 and queries is lower.
- Luxury is the sector that benefits most from the impact of the press (63% contribution within the media levers in the scope of the survey).
CONCLUSION
PRESS BRAND FOR A MEDIUM TO LONG-TERM EFFECT, PRESS PRODUCT FOR A SHORT-TERM EFFECT

Digital Press has an immediate effect on brand queries while the Paper Press will have a diffuse effect over time.

Diffusion effect on brand queries of the different media levers:

<table>
<thead>
<tr>
<th>Media Type</th>
<th>1 month</th>
<th>2-4 months</th>
<th>+4-12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Press Brand</td>
<td>75%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td>Print Press Brand</td>
<td>20%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Digital Press Product</td>
<td>0%</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Print Press Product</td>
<td>75%</td>
<td>20%</td>
<td>5%</td>
</tr>
<tr>
<td>Other Media Brand</td>
<td>50%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Other Media Product</td>
<td>90%</td>
<td>0%</td>
<td>10%</td>
</tr>
</tbody>
</table>
THE PRESS AT THE HEART OF EFFECTIVENESS  
KEY LEARNINGS

- 60 brand searches are generated for every €1,000 invested in the press, which is 50% more than the average for other media.

- The press generates 2/3 of the search engine searches from the media in the luxury sector with less than 50% share of voice.

- In the automotive sector, press 3rd campaigns represent 6% of investments but 22% of the tree at contribution to brand searches.

- In Banking-Insurance, the press brand shows the best ROI in Drive to Search brand.

- Brand messages are 2 to 3 times more effective than product messages in generating Drive to Search in the 3 sectors studied.

- In the automotive and luxury sectors, the press has the highest out of all the media levels for generating brand search traffic.

- Press is a tree level with great remanence over brand queries, with persistent effects over in the long-term.
MERCI AU GROUPE DE TRAVAIL

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Yvonne HERBIN
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Group Beyond

François KAHN
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