

100%

PRESS CONFERENCE

15 June 2022

**1<sup>st</sup> STUDY  
OF MEDIA EFFECTIVENESS  
ON SEARCH**

#DemainLaPresse  
**L'EFFICACITÉ**



45%

**ACPM**

**Ekimetrics. × KANTAR**

# THE SPEAKERS

#DemainLaPresse  
L'EFFICACITÉ



**Gautier PICQUET**

President of ACPM  
COO Publicis France  
CEO Publicis Media



**Stéphane DELAPORTE**

President of the Audience Committee of ACPM  
General Manager of 366



**Denis GAUCHER**

Executive Managing Director,  
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**Fabienne MARQUET**

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**Julien GAVIARD**

Partner at Ekimetrics



**Amélie BENISTY**

Director ACPM  
Audience

**ACPM**

**Ekimetrics.**



## INTERPROFESSIONAL ORGANISATION

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 1<sup>ST</sup> STUDY IN 2021

- **The Press** is the **2<sup>nd</sup> 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)

\* **Levers included in the scope:** TV, Press, Search, Display, Social media, Out-of-Home 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	LT Multiplier	Total R.O.I.
3,6	× 1,75	= 6,2

## DIGITAL PRESS

R.O.I. short-term	LT Multiplier	Total R.O.I.
4,2	× 1,1	= 4,6

## 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

## 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?

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

- A **driver for e-commerce** with a turnover in 2021 of 130 billion €\*.
- A **driver for physical sales**: 86% of consumers get information on the Internet before buying in a store\*\*.







## 2. FIRST ECONOMETRIC STUDY IN EUROPE OF MEDIA EFFECTIVENESS ON SEARCH

## 24 Database used: based on key-words

3 sectors targeted  
7 brands  
per sector



### AUTOMOTIVE



### BANK & INSURANCE



### LUXURY



Collection of key-words

- 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)



Selection of key-words

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



Database consolidation

- 3 sector databases (one per sector)
- 21 individual databases (one per brand)

- Annual search (2020 - 2021)
- Data sources: Ekimetrics & Kistler

# MEDIA LEVERS ANALYSED IN THE STUDY



**Press**  
(Printed and Digital)



**TV**

## AUTRES MÉDIAS



**Radio**



**OOH**



**Display**



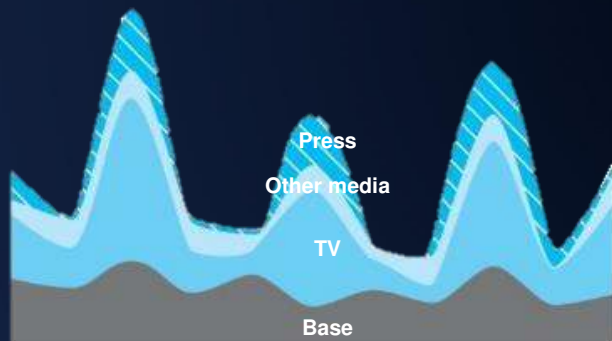
**Cinema**

# 1<sup>ST</sup> 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



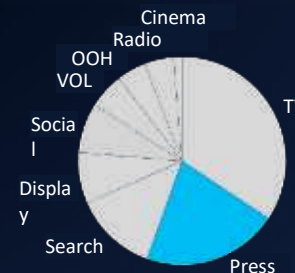
## CONTRIBUTION OF THE DIFFERENT MEDIA LEVELS

**PRESS CONTRIBUTION** = Number of searches generated by the press

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:



## 2<sup>ND</sup> KEY INDICATOR: R.O.I.

### RETURN ON INVESTMENT (R.O.I)

Performance measure used to evaluate the effectiveness of an investment

$$\text{R.O.I.} = \frac{\text{Contribution in number of searches generated}}{\text{Investment in € (gross)}} \times 1\,000$$

**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 with media highlighting the brand of an advertiser

### PRODUCT

Advertising creation with 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 first 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 market.»*

Stephane Loderer — General Director (ACM)



### 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

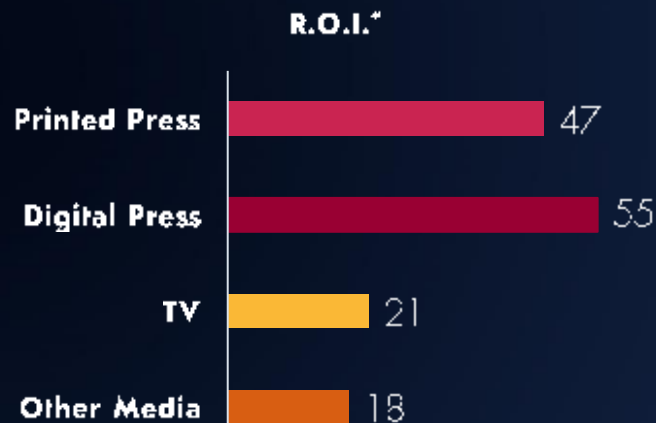
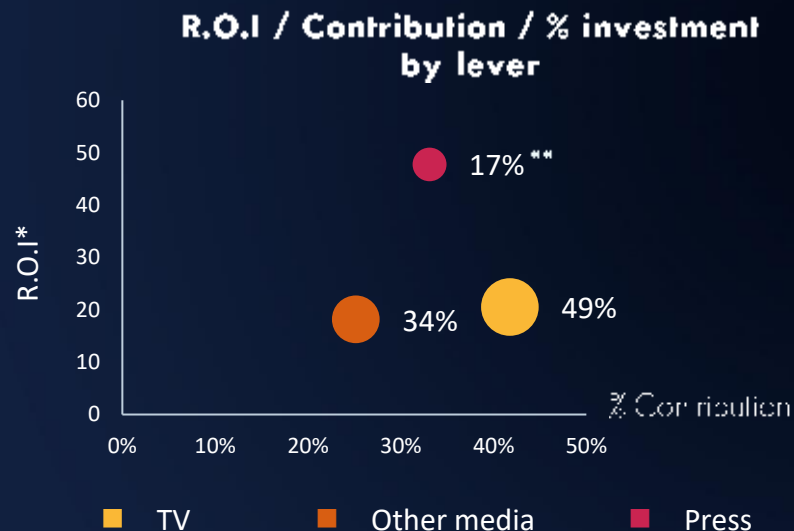
	Share of investments (all media)	Share of contributions (with media contributions)	Media R.O.I.	Press R.O.I.
Brand	<b>33%</b>	<b>60%</b>	<b>44</b> for every 1.000€ invested, 44 searches are generated	<b>88</b> for every 1.000€ invested, 88 searches are generated
Product	<b>67%</b>	<b>40%</b>	<b>15</b> for every 1.000€ invested, 15 searches are generated	<b>26</b> for every 1.000€ invested, 26 searches are generated

## AUTOMOTIVE

# PRESS IS THE MOST EFFECTIVE LEVER

1/3 of media contributions for 17% of advertising investments

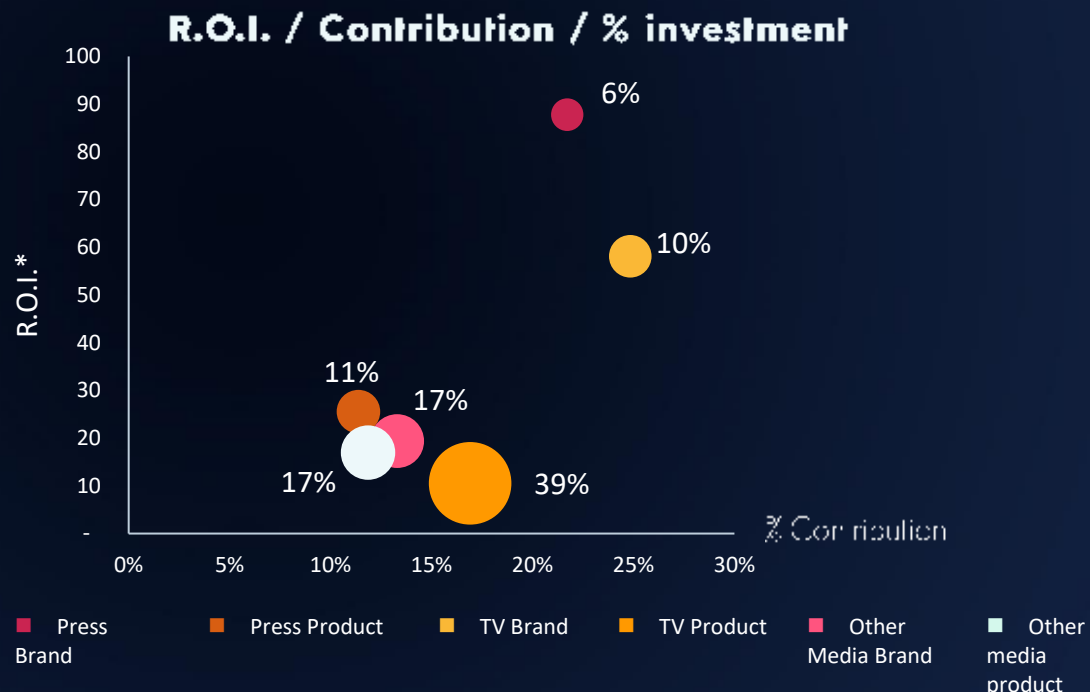
The press has an R.O.I. 2 to 3 times higher than other media



## 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

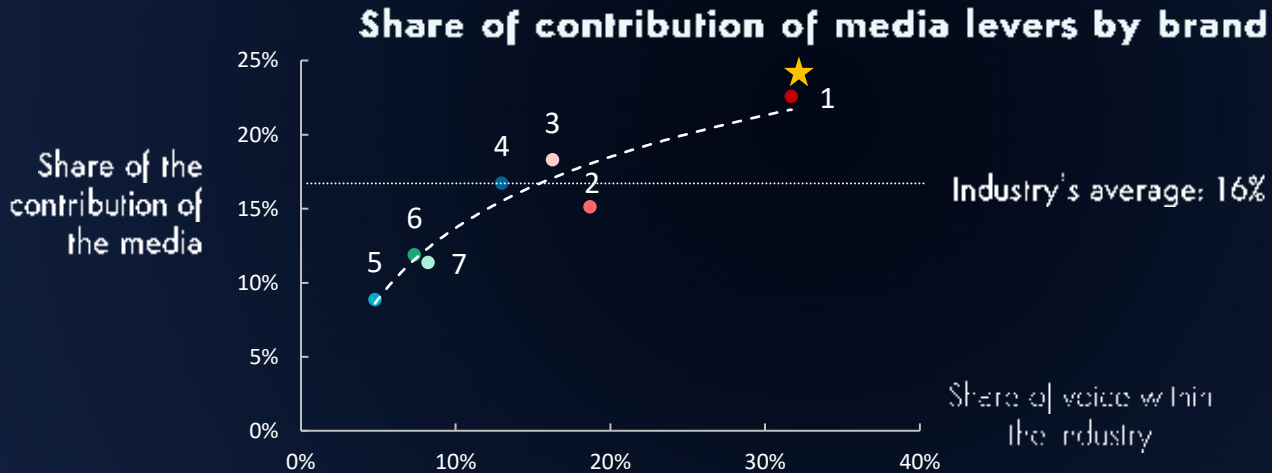


Size represents the share of investments

R.O.I.\*: Number of searches generated by a media lever for 1,000€ invested  
 %: Share of investments

## AUTOMOTIVE

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



• 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

★ Market leader

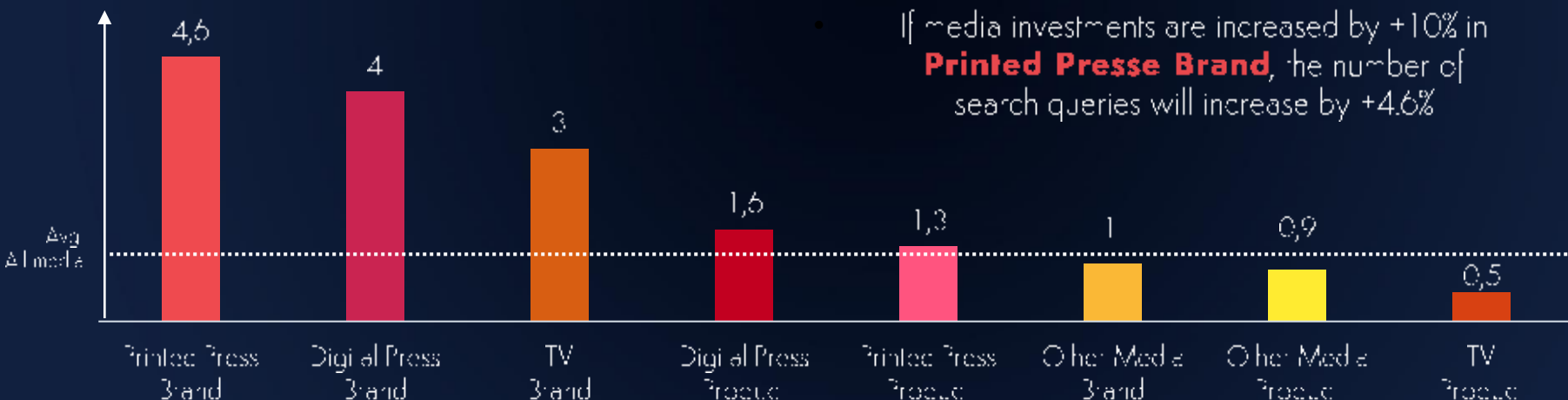
## AUTOMOTIVE

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

% increase in the volume of queries

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 +4.6%



## KEY LEARNINGS - AUTOMOTIVE

- Traditional media levers contribute to 16% of the brand's search volume
- Press levers contributed 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 Product messages R.O.I.
- To generate drive to search brand, focus on Printed Press Brand, Digital Press Brand or TV Brand





## 4. A BROAD SPECTRUM OF EFFECTIVENESS: BANKING / INSURANCE

## BANKING / INSURANCE

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

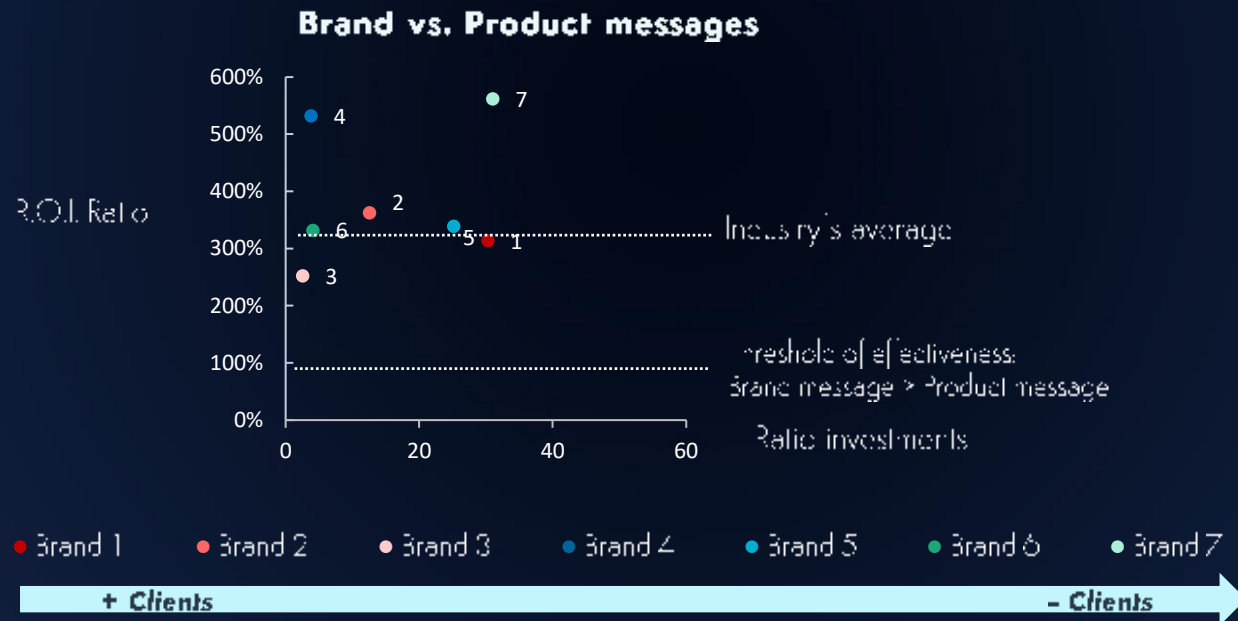
While only 12% of advertising spend is on Brand messages, they generate 28% of brand searches.

	Share of investments in the media	Share of contributions within media contributions	Media R.O.I.	Press R.O.I.
Brand	<b>12%</b>	<b>28%</b>	<b>164</b> on every €1,000 invested, 164 searches are generated.	<b>188</b> on every €1,000 invested, 188 searches are generated.
Product	<b>88%</b>	<b>72%</b>	<b>56</b> on every €1,000 invested, 56 searches are generated.	<b>47</b> on every €1,000 invested, 47 searches are generated.



## BANKING / INSURANCE

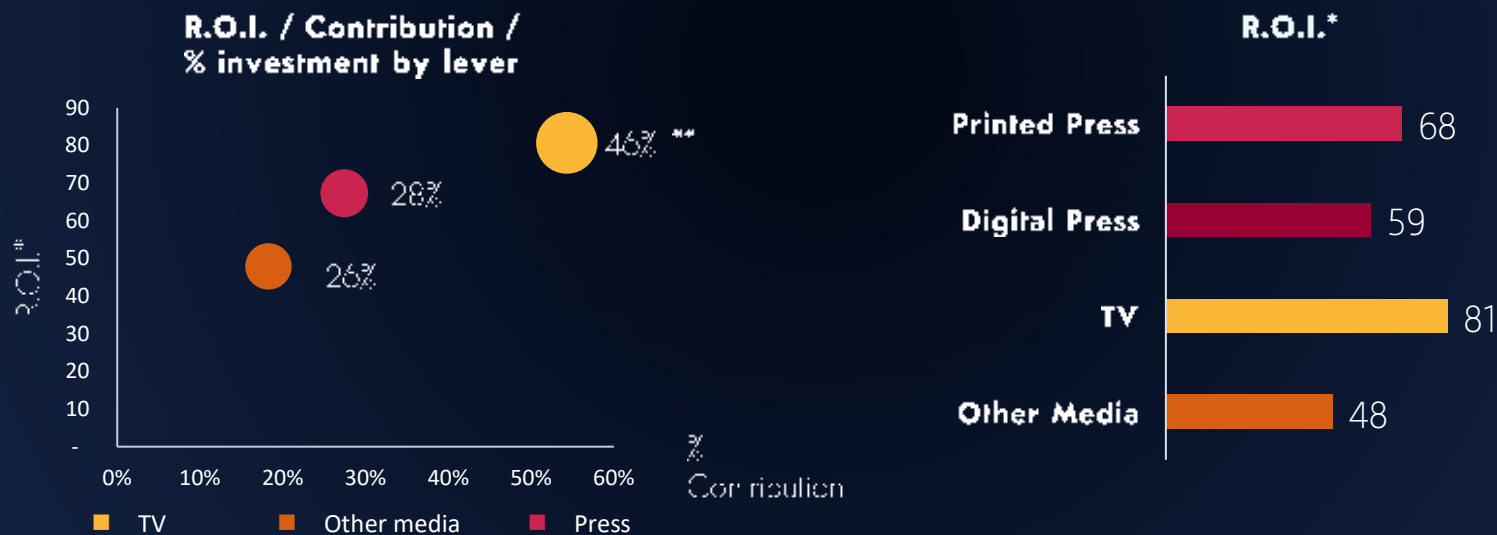
# REGARDLESS OF THE BRAND SIZE, BRAND MESSAGES ARE ALWAYS MORE EFFECTIVE THAN PRODUCT MESSAGES



## BANKING / INSURANCE

# THE PRESS HAS THE 2<sup>ND</sup> 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

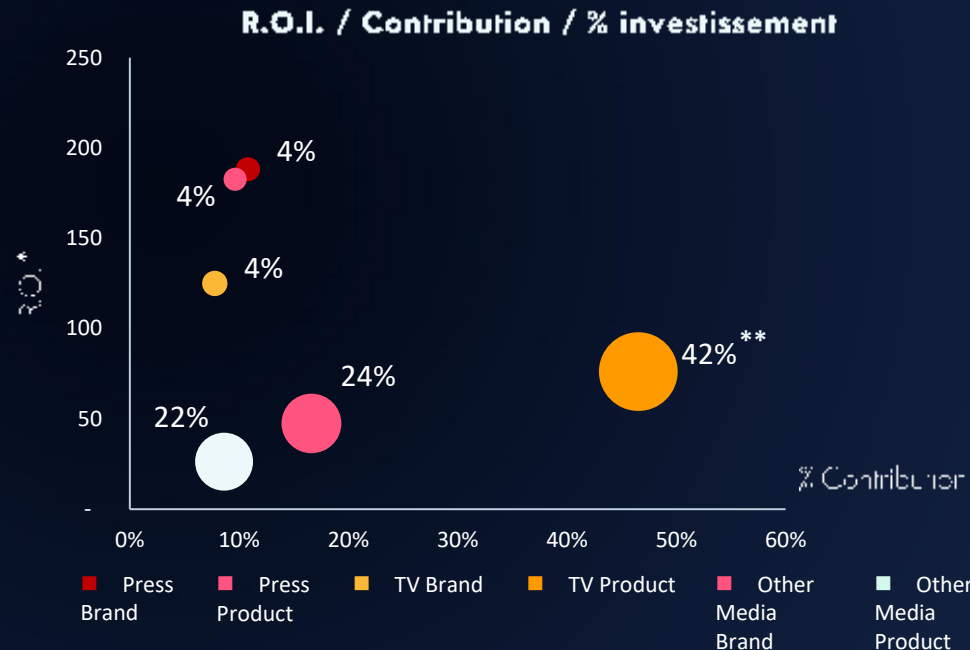


R.O.I.\*: Number of searches generated by a media lever for 1,000€ invested  
\*\*: Share of investments

## 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

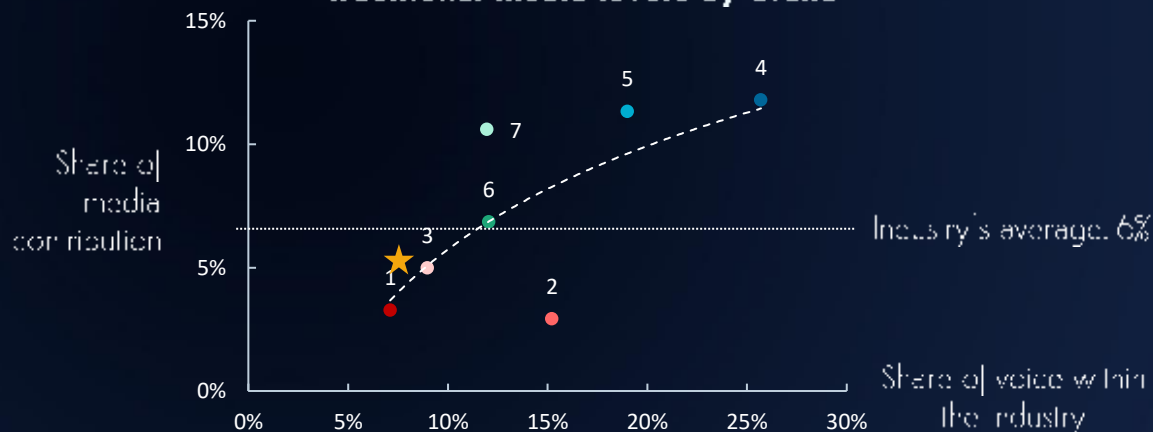


## BANKING

# 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



● Brand 1 ★ ● Brand 2 ● Brand 3 ● Brand 4 ● Brand 5 ● Brand 6 ● Brand 7

+ Clients



- Clients

*\*All the brands that were studied are anonymized*

★ Market leader

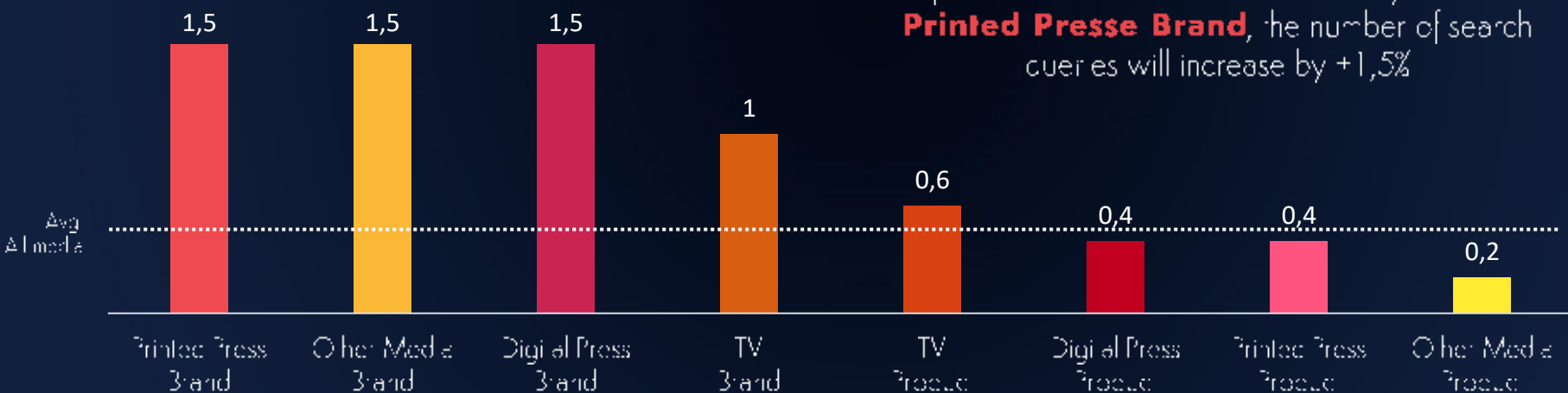
**Ekimetrics.**

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 **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.
- Brand messages are underinvested in the industry (12% of total investments)
- Brand 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

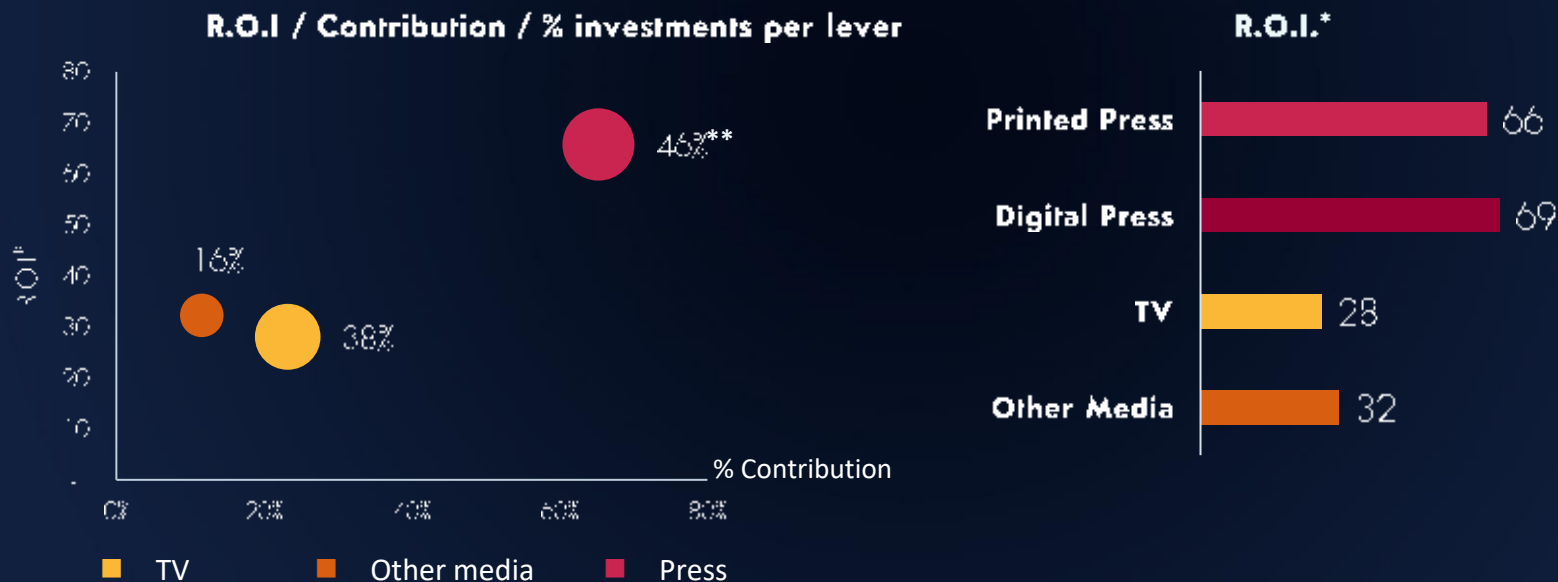
	Part des investissements (All media)	Share of contributions (with the media contribution)	Media R.O.I	Press R.O.I
Brand	<b>26%</b>	<b>46%</b>	<b>81</b> for every € ,000 invested, 81 searches are generated	<b>92</b> for every € ,000 invested, 92 searches are generated
Product	<b>74%</b>	<b>54%</b>	<b>34</b> for every € ,000 invested, 34 searches are generated	<b>46</b> for every € ,000 invested, 46 searches are generated



LUXURY

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

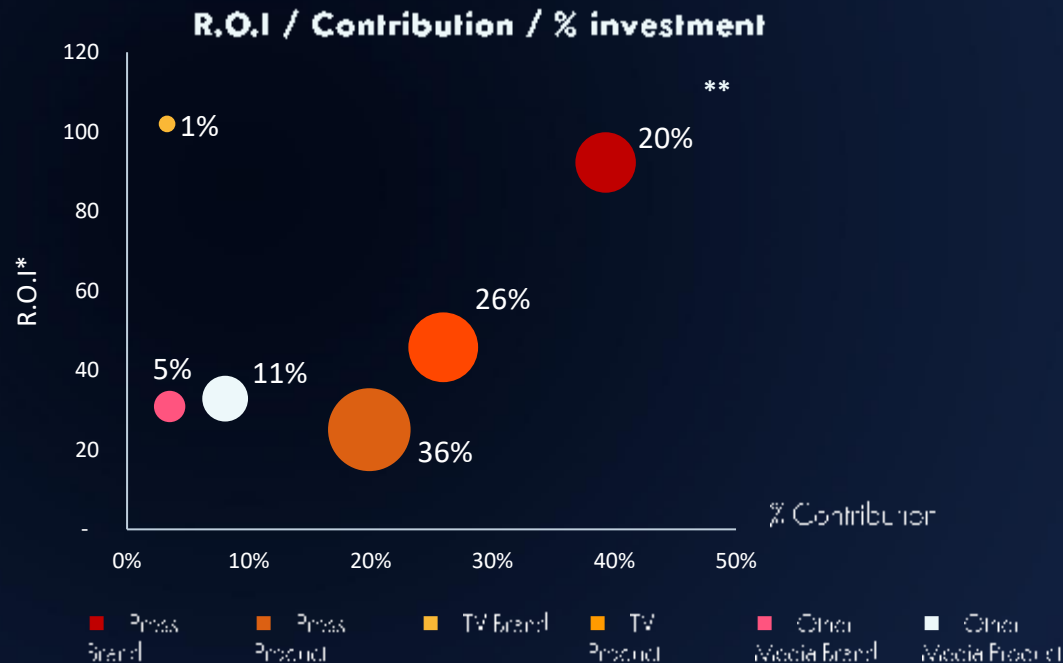
The press represents 2/3 of the contributions to Search Luxe



LUXURY

## PRESS BRAND MESSAGES HAVE BOTH VERY HIGH R.O.I. AND HIGH CONTRIBUTION

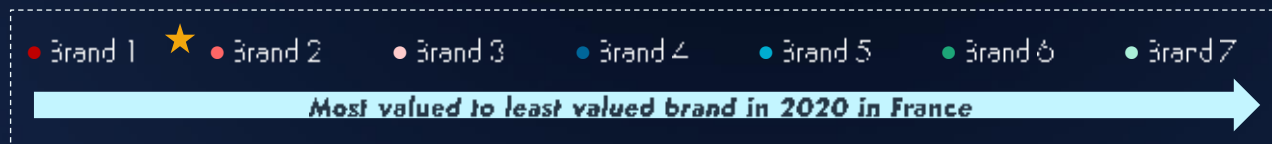
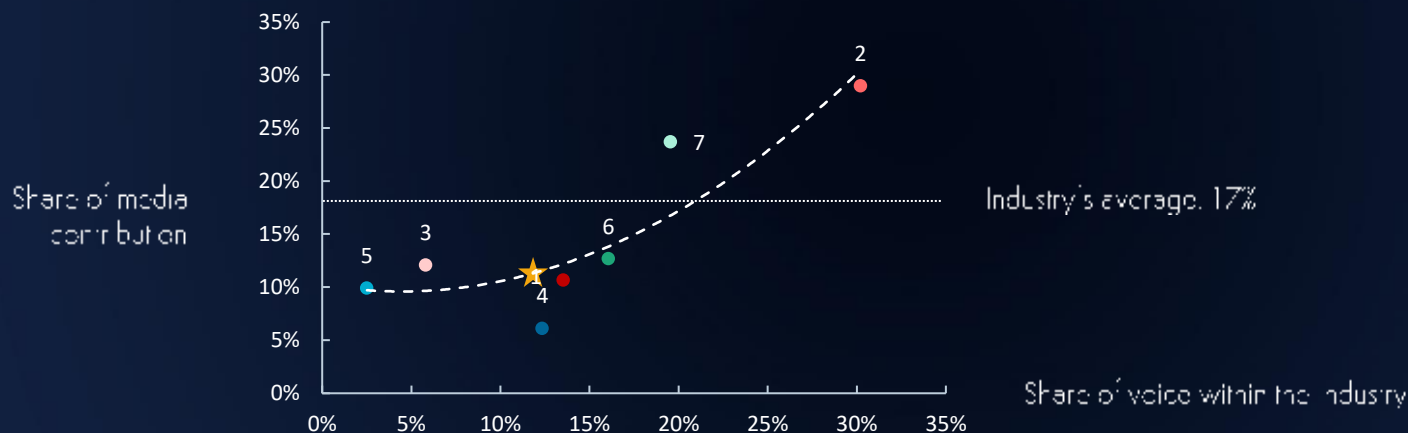
The Press Brand generates 40% of contributions and has the best R.O.I. before the other media with only 20% of advertising investments



LUXURY

# MEDIA EFFECTIVENESS ACTIVATED BEYOND THE MINIMUM THRESHOLD OF 17% OF MEDIA INVESTMENTS

Share of contribution vs. investment of traditional media levers by brand



*\*All the brands that were studied are anonymized*

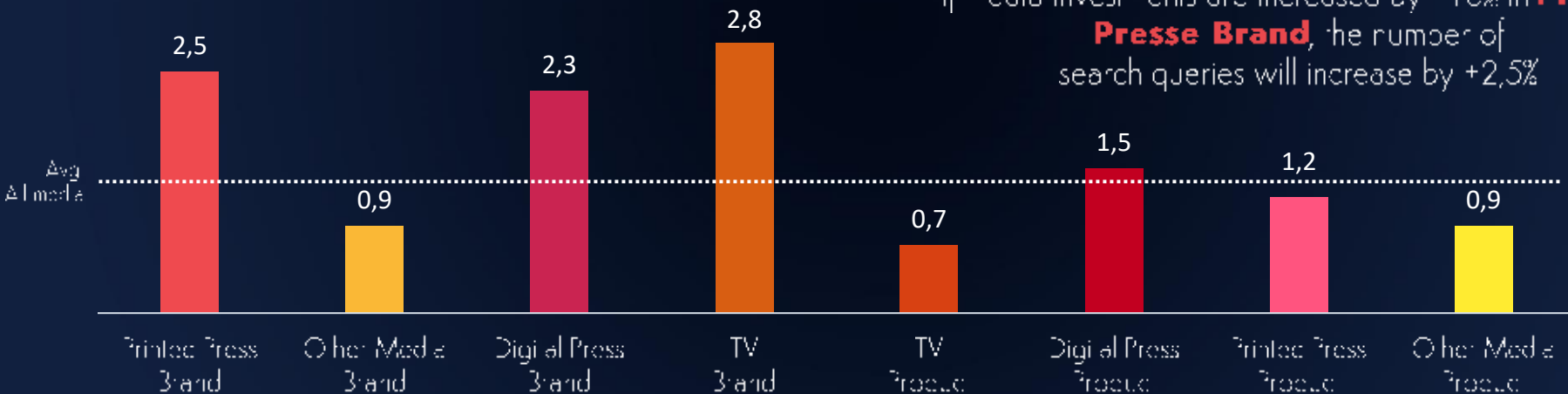
★ *Market leader*

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 contribute to 17% of brand search volume.
- Press levers have contributed up to 11% 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** (highest R.O.I) to generate brand related search queries.
- « Brand » messages have an R.O.I 3 times higher than « Product » messages.
- To generate Drive to Search brand, focus on **Printed Press Brand, Digital Press Brand or TV Brand.**



## 6. CONCLUSION



## CONCLUSION

# PRESS R.O.I. ON BRAND RESEARCH



### AUTOMOTIVE

48

For every 1,000€ invested,  
48 searches are generated



### BANKING & INSURANCE

66

For every 1,000€ invested,  
66 searches are generated



### LUXURY

67

For every 1,000€ invested,  
67 searches are generated

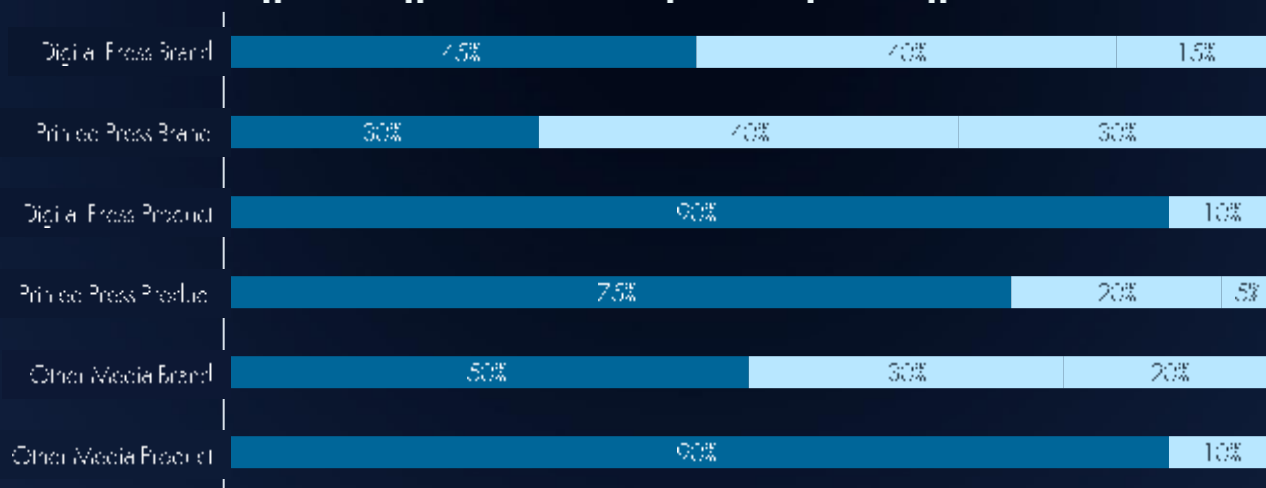
- Automotive is the sector where the media is most effective in generating brand search volume
- In the Banking and Insurance sector, Brand messages are not played very often, which explains why the contribution of the media to the volume of Search Brand queries is lower
- Luxury is the sector that benefits most from the impact of the press (63% contribution within the media levers in the scope of the study)

## 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 levels





## THE PRESS AT THE HEART OF EFFECTIVENESS

### KEY LEARNINGS

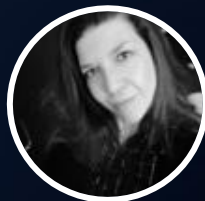
- ~ 60 brand searches are generated for every €1,000 invested in the press, which is 50% more than the average for other media
- The press generates 2/3 of the search engine searches (from the media in the luxury sector with less than 50% share of voice)
- In the automotive sector, Press 3-ard campaigns represent 6% of investments but 22% of the media contribution to brand searches
- In Banking-Insurance, the Press Brand shows the best R.O.I. in Drive to Search brand
- 3-ard 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 output of all the media levers for generating brand search traffic
- Press is a media lever with great permanence over brand queries, with persistent effects over time in the long-term

## MERCI AU GROUPE DE TRAVAIL



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Media Figures



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