Digital Media Owners Survey
Autumn 2018

IPA

Background, Research Methodology and Survey Response

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Methodology and Survey Response

- Fieldwork for the survey was undertaken between September 12th and November 3rd 2018
- Digital planners, strategists and buyers in media agencies and digital specialists were invited to take part in the online survey by email.
- Respondents were selected by an intermediary within selected agencies according to their perceived knowledge of the sector – 258 survey responses were received from individuals having a working relationship with Digital Media Owners
- In this latest edition of the research, respondents were first asked to indicate which of media owners they had a trading relationship with. They were then asked to rate only those owners against a set of 11 or 12 image attributes on a 7 point scale from strongly agree to strongly disagree.
- In the analysis that follows Don't know and Not applicable responses have been removed so that a fair comparison between media owners can be made.

For the first time the Autumn Survey includes the **JICWEBS Digital Trading Standards Group** Status of each supplier. Of the 22 listed suppliers, 16 are DTSG Signatories and 12 of these are certified.

DTSG Brand Safety Signatories have signed up to JICWEBS to be independently verified

DTSG Certified means the business has had their brand safety policies and processes independently verified, and have received a seal of approval**.** Each of the suppliers DTSG status is shown in the table below

	DTSG Signatory	DTSG Certified
Amazon	✔	
Blis	✔	✔
Captify	✔	✔
Channel4.com		
Dennis Publishing		
Facebook	✔	
Google (Display)/YouTube	✔	✔
Inskin Media	✔	✔
ITV.com		
LoopMe	✔	✔
Mail Online/Associated	✔	
Media iQ	✔	✔
News UK	✔	✔
Oath	✔	✔
Quantcast	✔	✔
Sky Digital Media		
Snapchat		
Spotify	✔	
Teads	✔	✔
Telegraph.co.uk	✔	✔
The Guardian	✔	✔
Twitter		

Key Findings

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Main Findings

- MailOnline/Associated has taken the lead position in the Autumn 2018 Online Media Owner survey with 80.9% of respondents agreeing strongly or agreeing that their overall experience of dealing with them is good. This score is up by 9 percentage points since the last survey.

- Three other media owners, Captify, Quantcast and Telegraph.co.uk have a top two box score for this overall "Grand Prix', in excess of 75%, while 4 media owners (Blis, ITV.com, MediaIQ and The Guardian s have a score in excess of 70%.

- Only Facebook has a strongly agree/agree score of below 50% for the overall "Grand Prix", while 5 others, Google/YouTube, Inskin Media, LoopMe, Sky Digital Media, Spotify and Twitter have scores below 60%.

- Captify leads the rankings for Ad Networks/Exchanges, DSP and Sales Houses (78.9%) while Oath (66.3%) continues to lead Online Pure Plays.

Main Findings

- MediaIQ leads 3 categories (Understanding of Client Objectives, Ease of Contact and Media Owner/Agency Partnership), while The Guardian (Quality of Response to Brief and Provision of Creative Solutions), Teads (Understanding of Own Product and Communication of New Opportunities) and Telegraph.co.uk (Understanding of Cross-media Opportunities) and Dispute Resolution)each lead 2 categories.

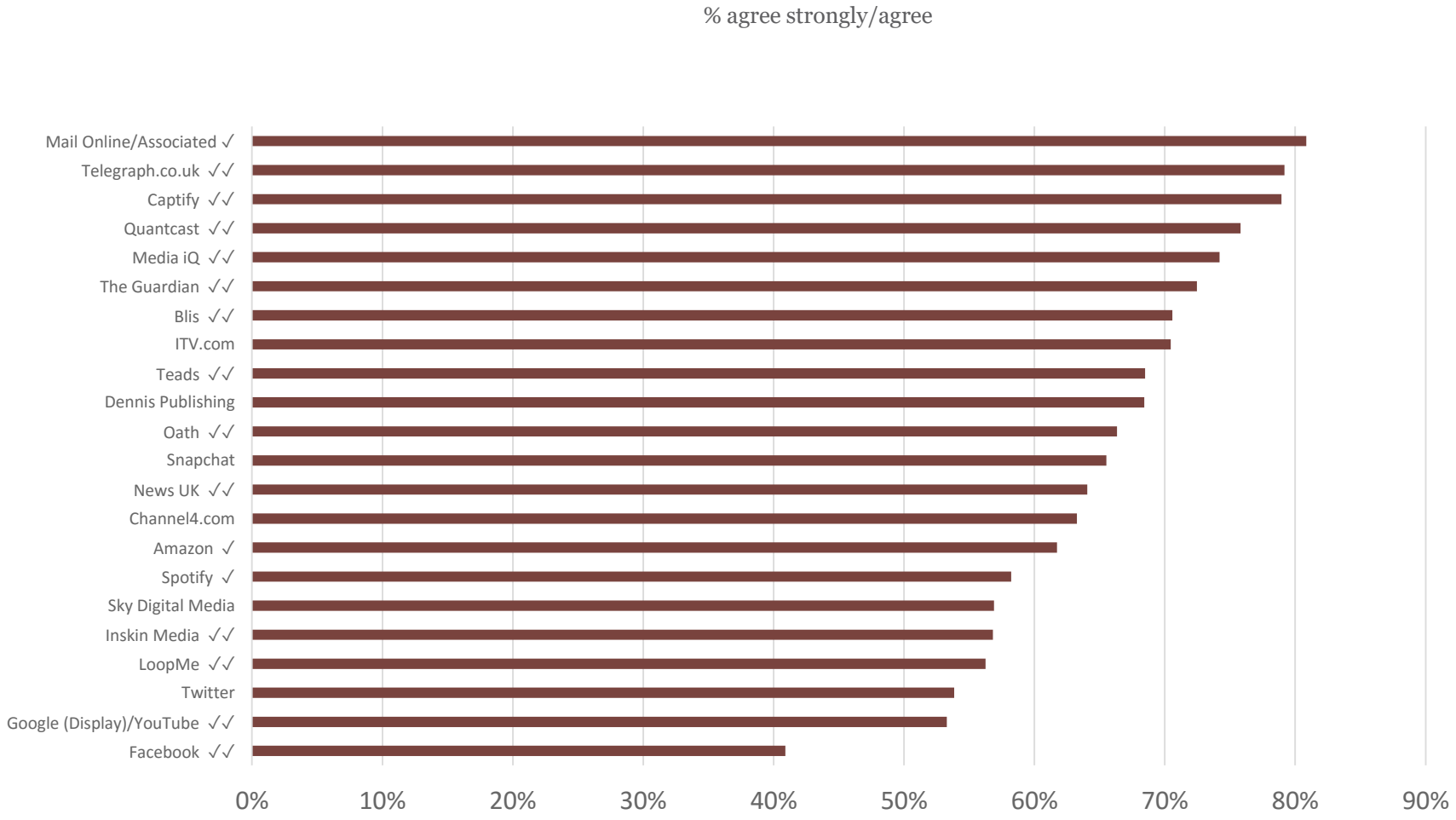
- Quantcast (Communication of Direct Client Contact), leads 1 category each, while in addition to the overall "Grand Prix", MailOnline/Associated also leads the Regular Client Contact category.

- Dennis Publishing is the most improved performers since the last survey showing an increase of 10 percentage points or more across 4 rankings each, while Channel4.com, ITV.om and The Guardian have seen similar increases across 3 categories.

- At the other end of the spectrum Spotify has seen a decline of 10 percentage points or more across 10 categories, while Inskin Media and LoopMe have seen similar levels of decline across 7 categories each.

Rankings by Variable
% strongly agree/agree

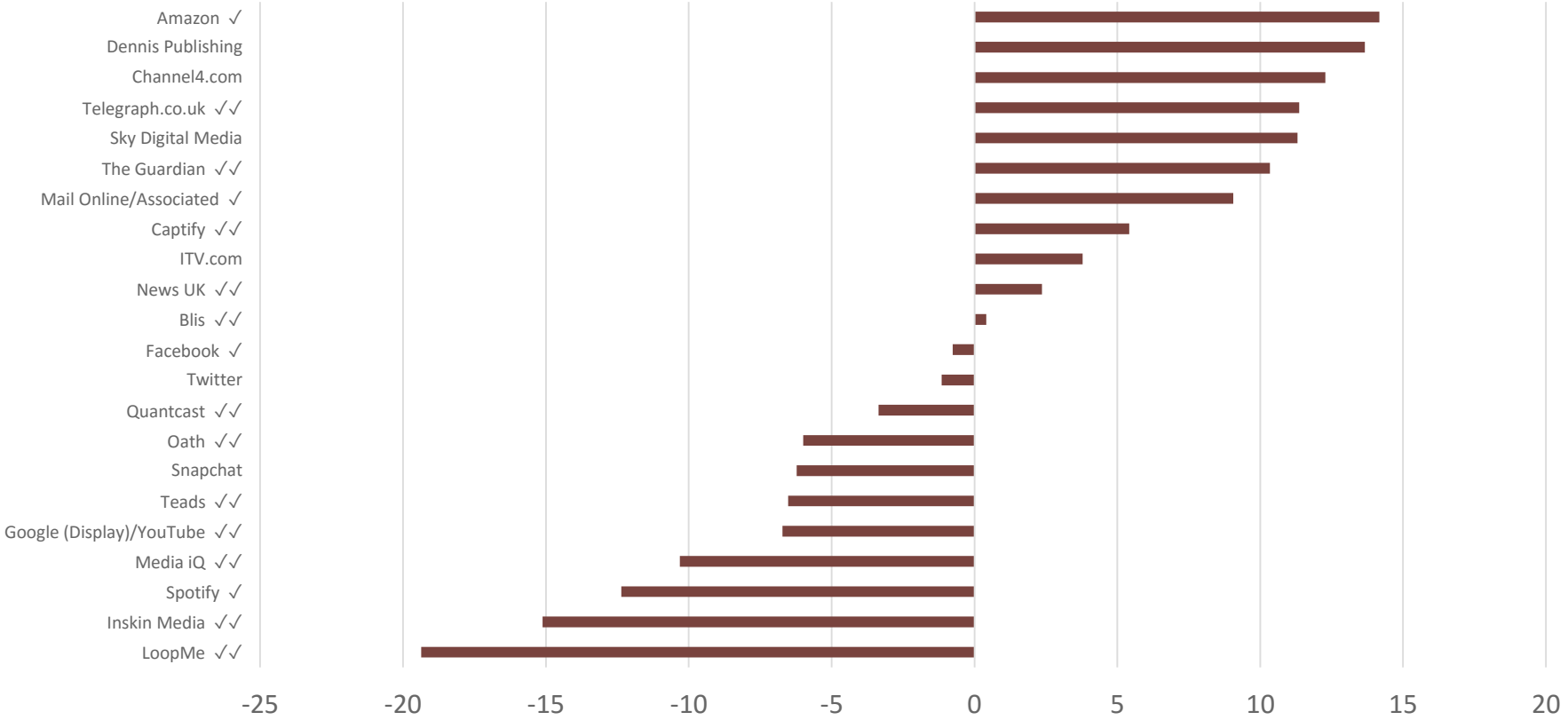
My overall experience of dealing with this supplier is a good one Autumn 2018



✓ :DTSG Signatory
✓✓ : DTSG Certified

My overall experience of dealing with this supplier is a good one
Autumn 2018 vs Spring 2018

% point change



✓ :DTSG Signatory
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My overall experience of dealing with this supplier is a good one
Ad Networks/Exchanges, DSP and Sales Houses

	Spring '15	Autumn '15	Spring '16	Autumn '16	Spring '17	Autumn ' 17	Spring '18	Autumn '18
	%	%	%	%	%	%	%	%
CAPTIFY ✓✓							73.5	78.9
QUANTCAST ✓✓	80.8	82.4	78.8	81.7	71.3	78.4	79.2	75.8
MEDIA iQ ✓✓							84.5	74.2
BLIS ✓✓					72.5	74.3	70.2	70.6
TEADS ✓✓					70.2	75.0	75.0	68.5
INSKIN MEDIA ✓✓	80.0	74.2	78.0	80.3	63.9	73.9	71.9	56.8
LOOPME ✓✓							75.6	56.3

✓ :DTSG Signatory
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My overall experience of dealing with this supplier is a good one
Online Pure Plays

	Spring '15	Autumn '15	Spring '16	Autumn '16	Spring '17	Autumn '17	Spring '18	Autumn '18
	%	%	%	%	%	%	%	%
OATH ✓✓							72.3	66.3
SNAPCHAT					62.3	55.6	71.7	65.5
AMAZON ✓	52.1	58.2	46.3	46.2	49.1	57.6	47.6	61.7
SPOTIFY ✓			74.3	75.7	65.7	72.3	70.6	58.2
TWITTER	71.1	68.6	65.8	59.7	53.3	48.7	55.0	53.8
GOOGLE /YOUTUBE ✓✓	56.0	63.8	61.6	60.7	59.5	63.6	60.0	53.3
FACEBOOK ✓	47.2	53.0	52.5	50.5	46.0	35.2	41,.7	40.9

✓ :DTSG Signatory
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My overall experience of dealing with this supplier is a good one
Crossover Media

	Spring '15	Autumn '15	Spring '16	Autumn '16	Spring '17	Autumn '17	Spring '18	Autumn '18
	%	%	%	%	%	%	%	%
MAILONLINE/ASSOCIATED ✓	71.9	77.7	67.3	68.5	61.9	46.6	71.8	80.9
TELEGRAPH.CO.UK ✓✓	66.0	70.5	71.1	72.5	60.8	62.4	67.8	79.2
THE GUARDIAN ✓✓	73.4	71.0	59.3	70.1	61.7	65.3	62.1	72.5
ITV.COM	52.6	55.7	56.9	55.6	61.0	54.0	66.7	70.5
DENNIS PUBLISHING	68.2	76.7	72.6	81.5	55.7	73.3	54.8	68.4
NEWS UK ✓✓							61.7	64.1
CHANNEL4.COM	51.8	59.7	49.3	50.9	56.7	51.8	51.0	63.3
SKY DIGITAL MEDIA	63.9	41.4	54.7	45.6	56.8	56.1	45.6	56.9

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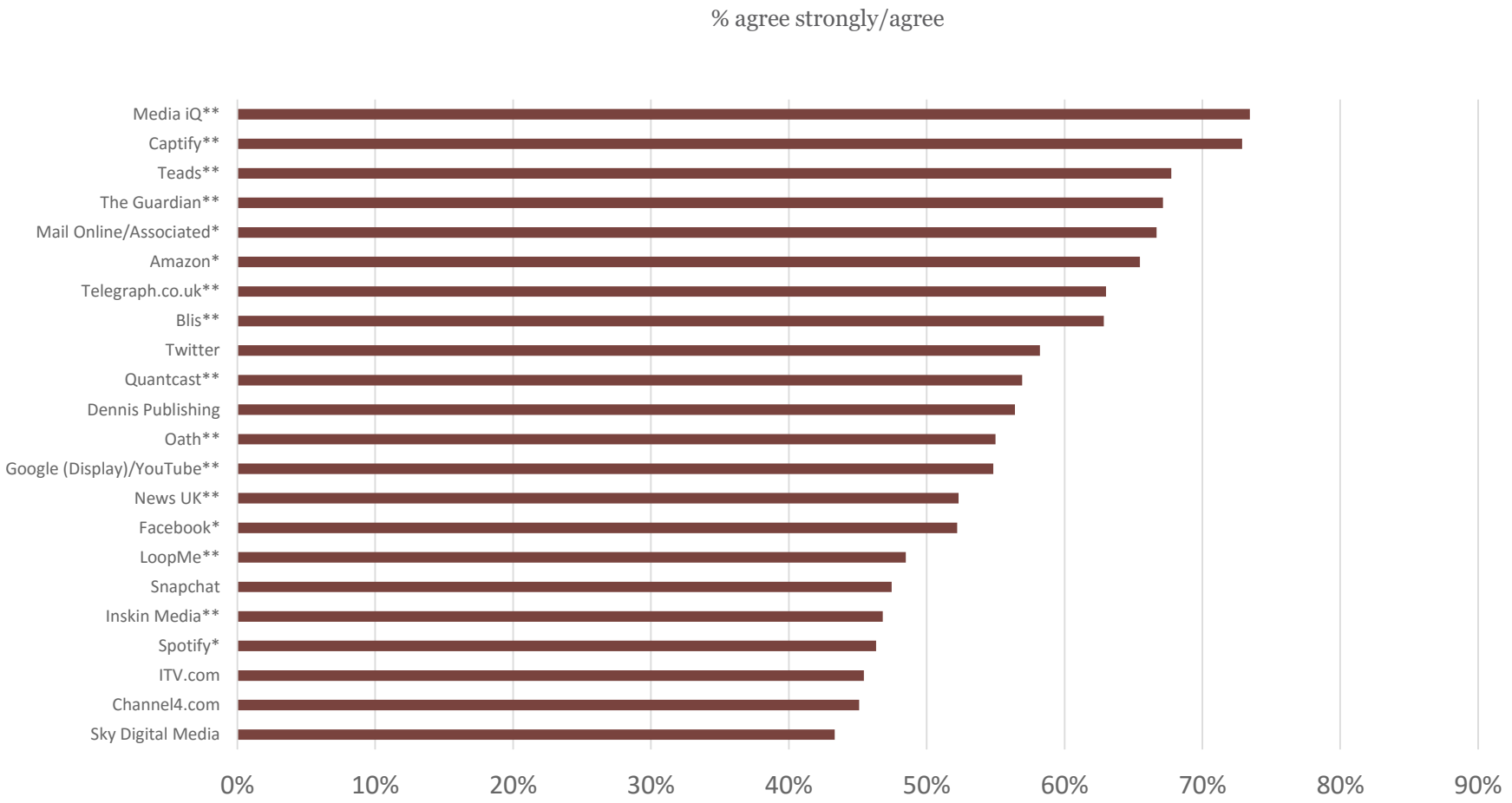
The sales team understand my client strategies/objectives Autumn 2018



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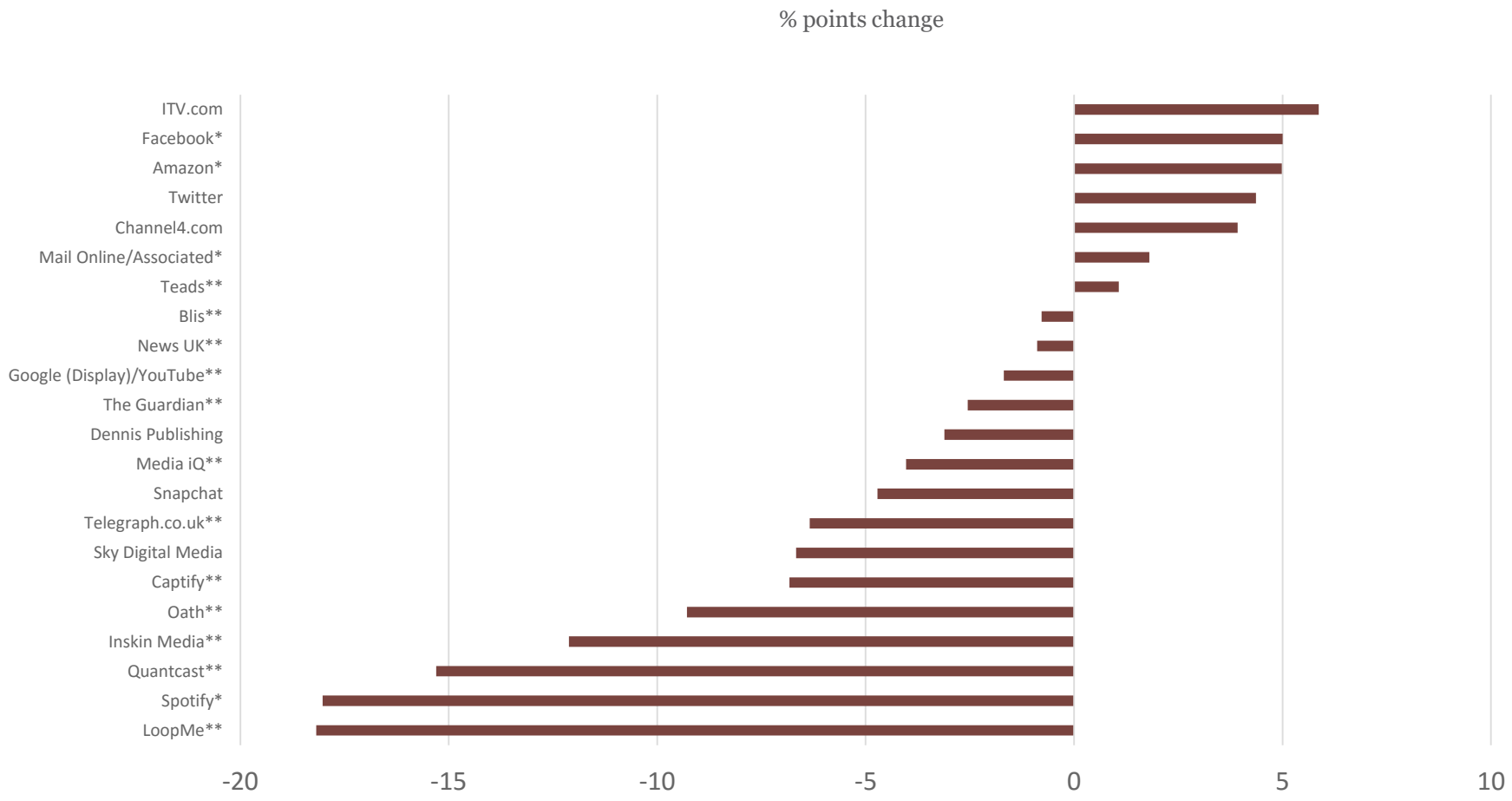
The sales team understand my client strategies/objectives
Autumn 2018 vs Spring 2018



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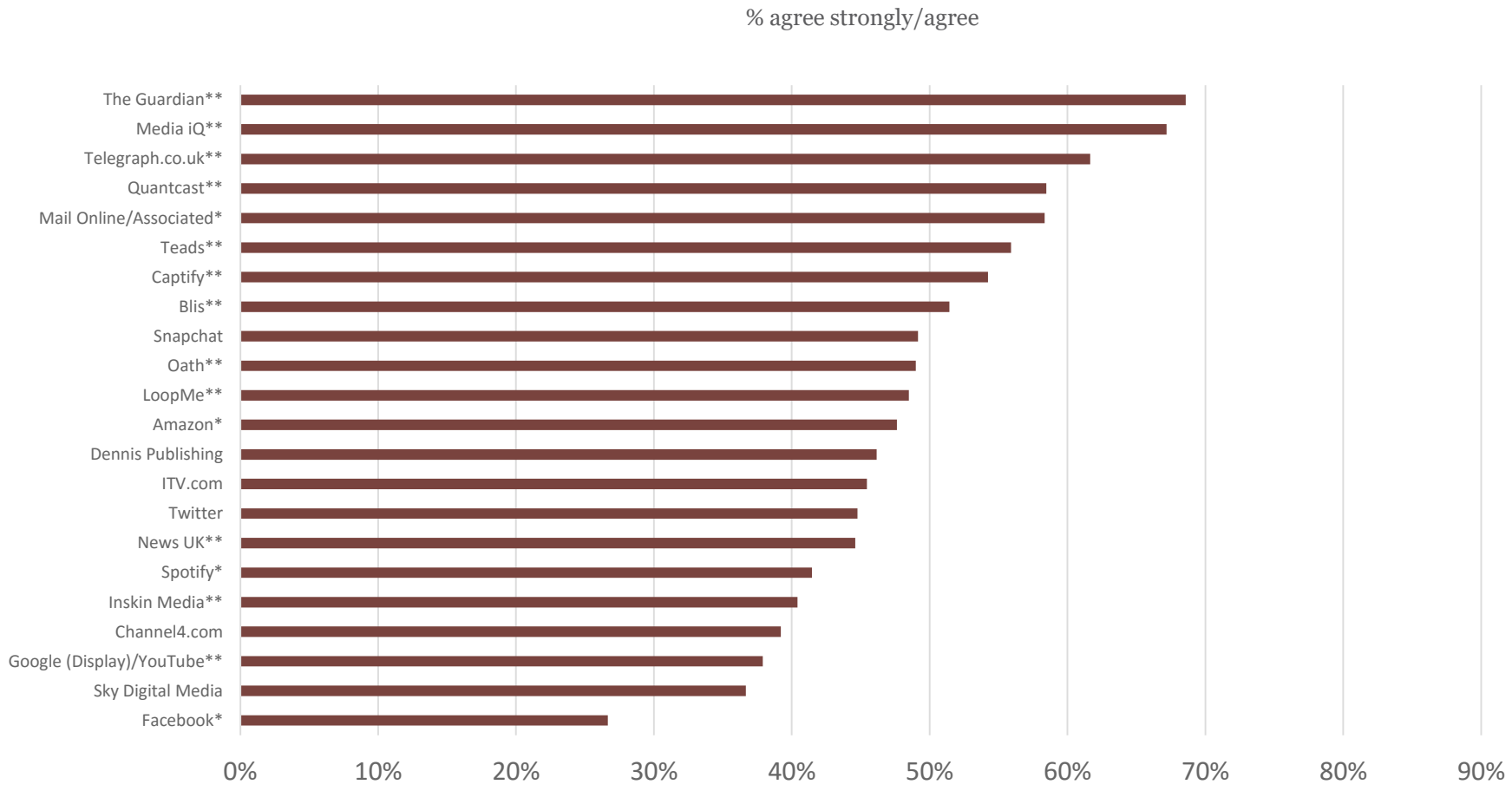
The quality of responses to brief are high
Autumn 2018



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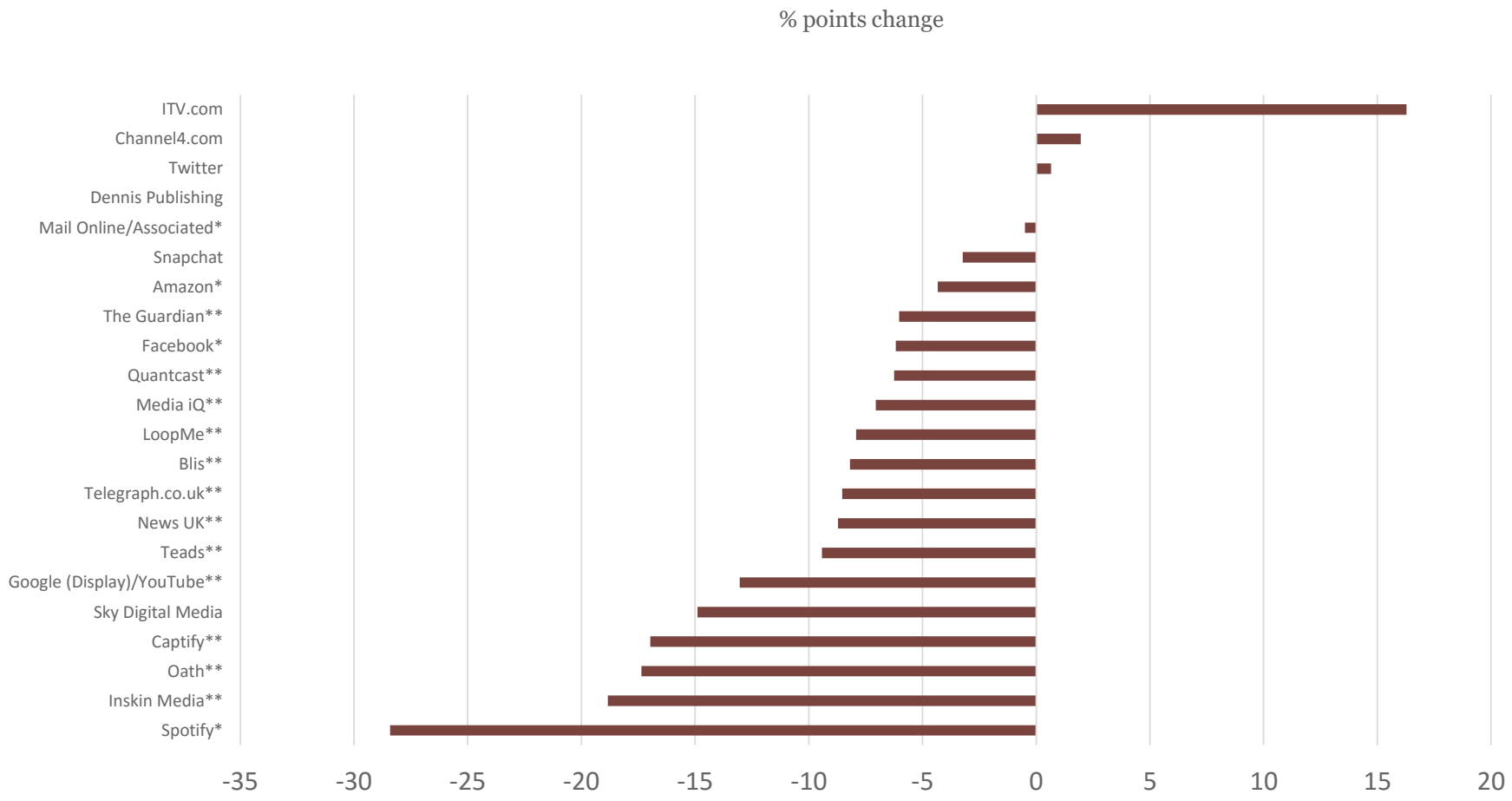

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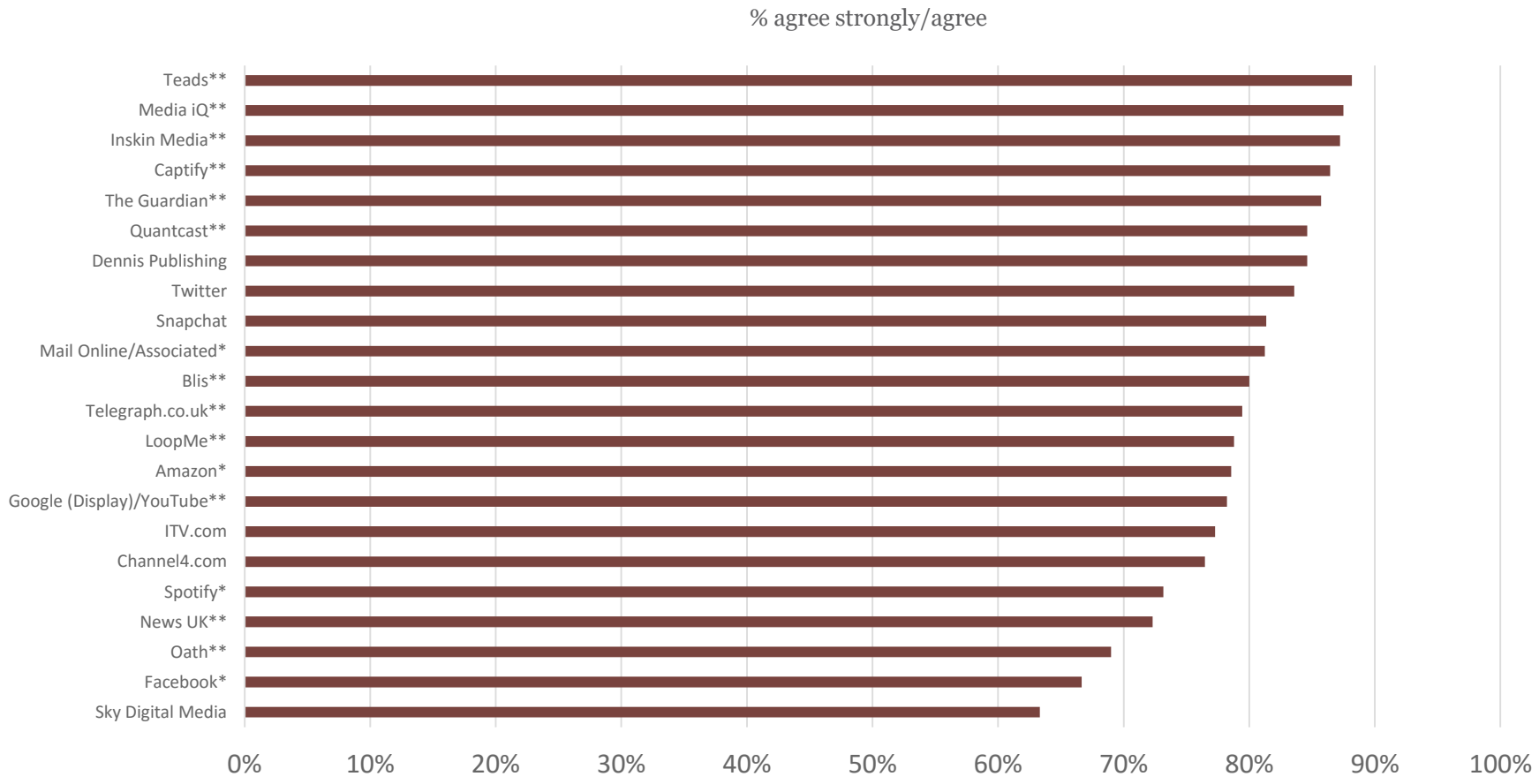
The sales team demonstrates an excellent understanding of their own products Autumn 2018



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The sales team demonstrates an excellent understanding of their own products
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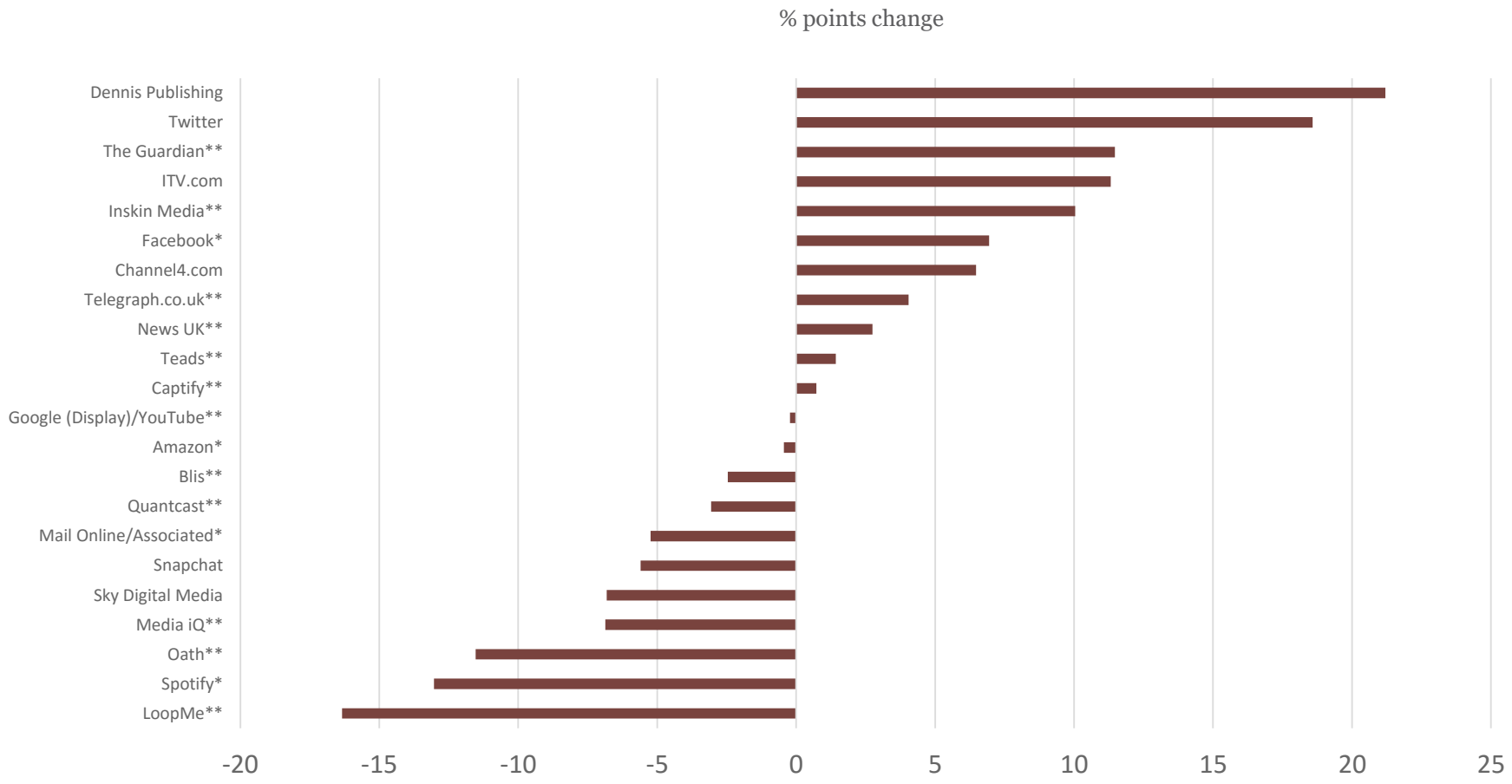

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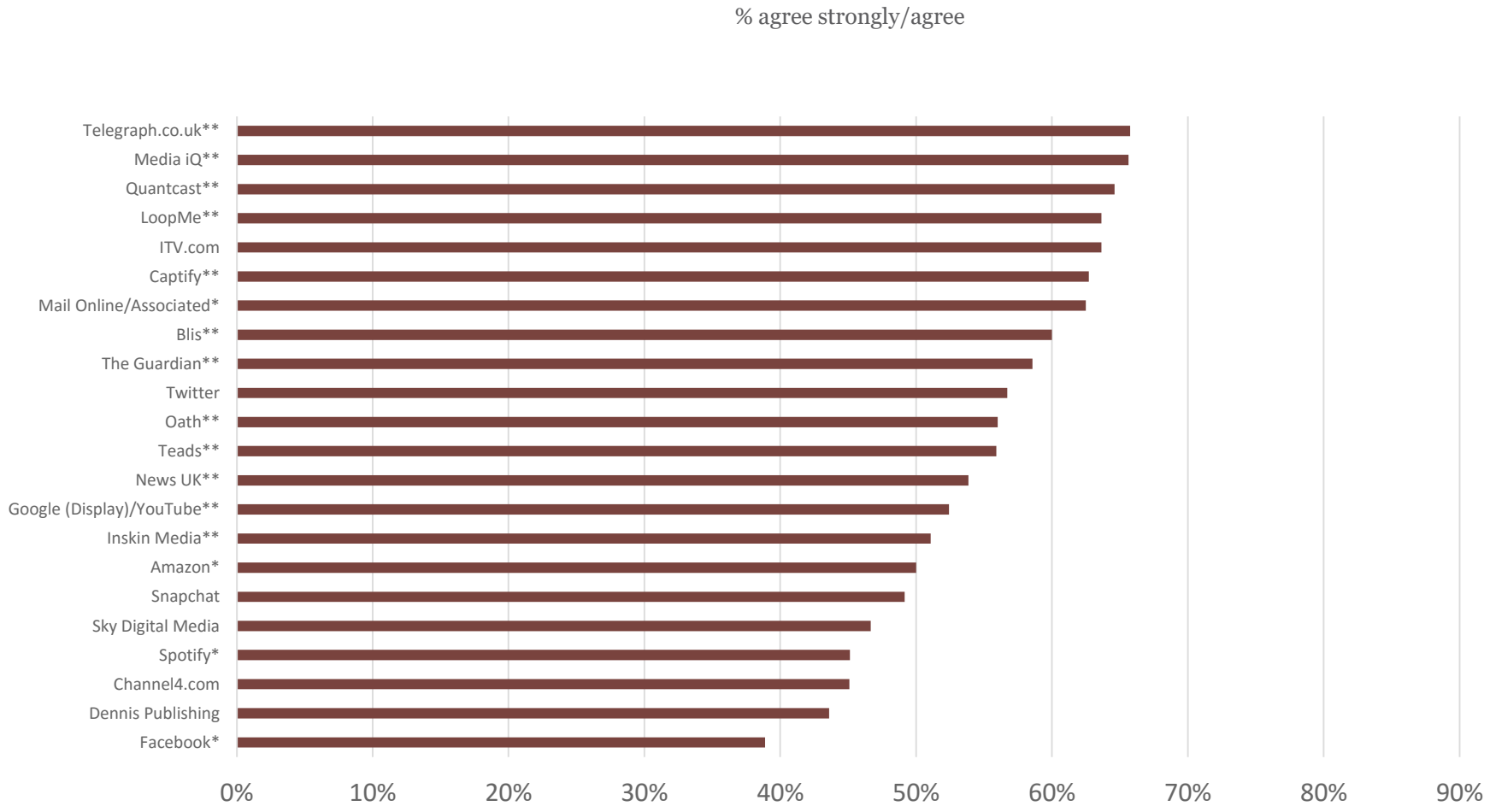
The sales team are professional in dealing with dispute resolution Autumn 2018



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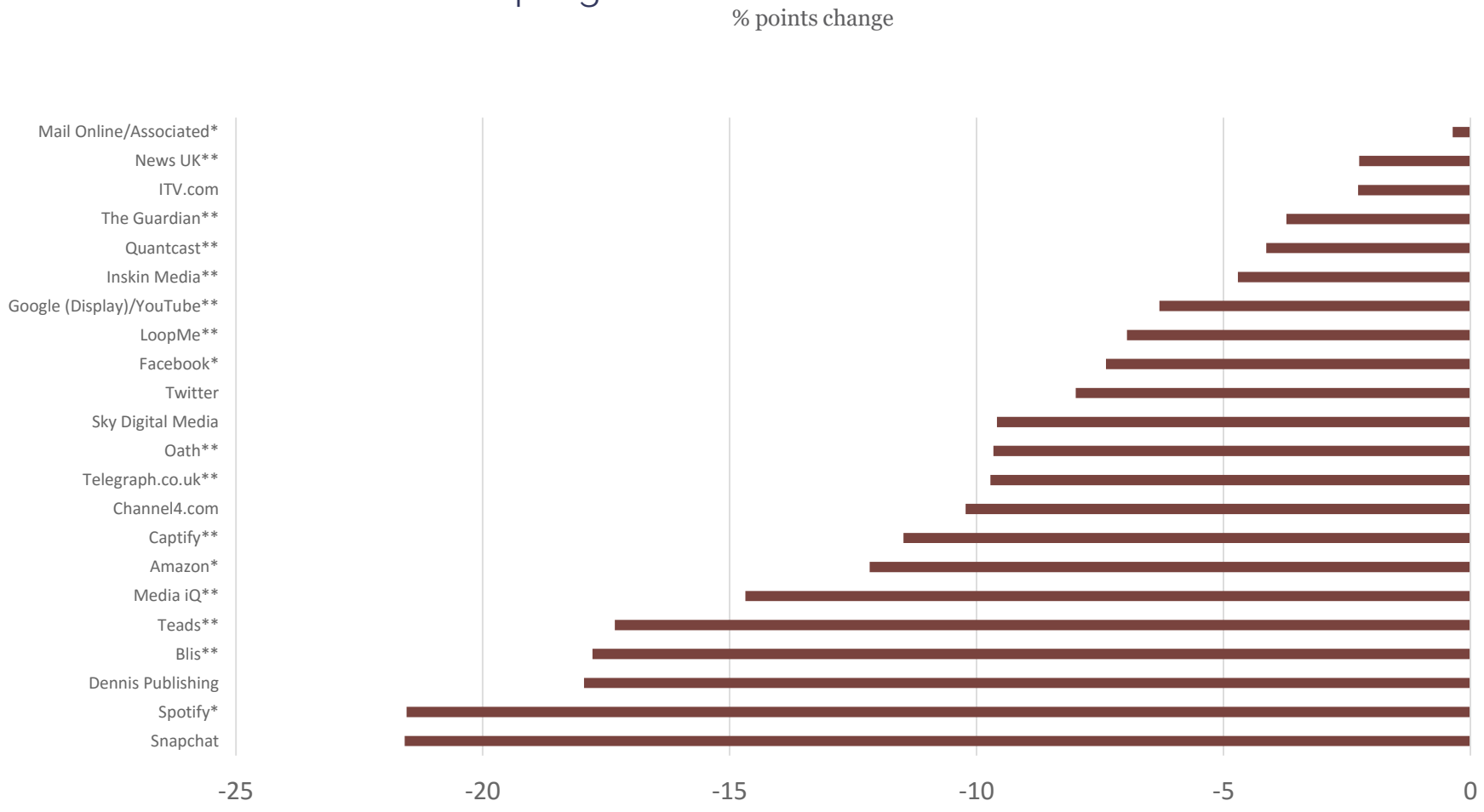
The sales team are professional in dealing with dispute resolution Autumn 2018 vs Spring 2018



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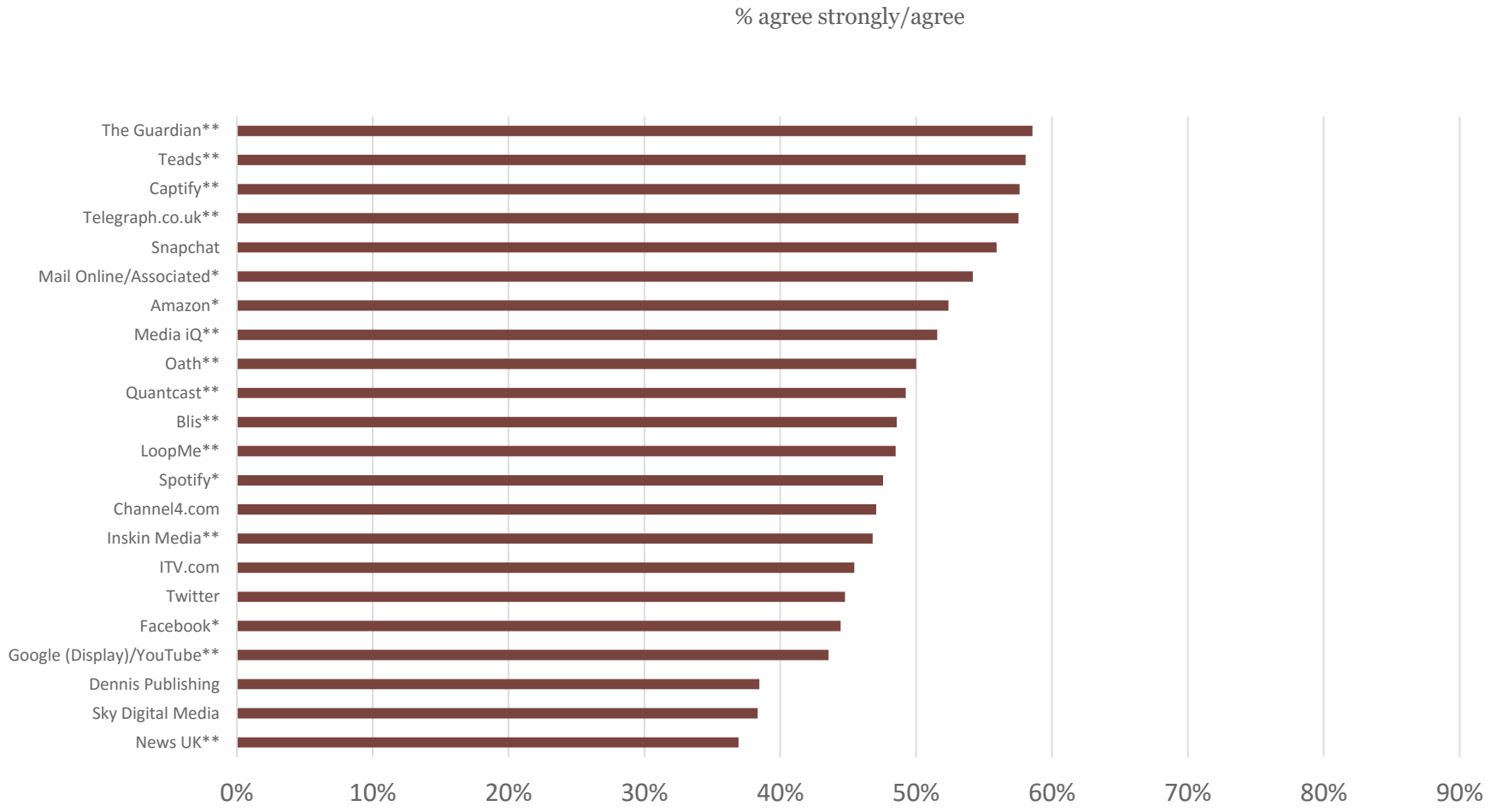
The media owner delivers innovative, creative solutions
Autumn 2018



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The media owner delivers innovative, creative solutions
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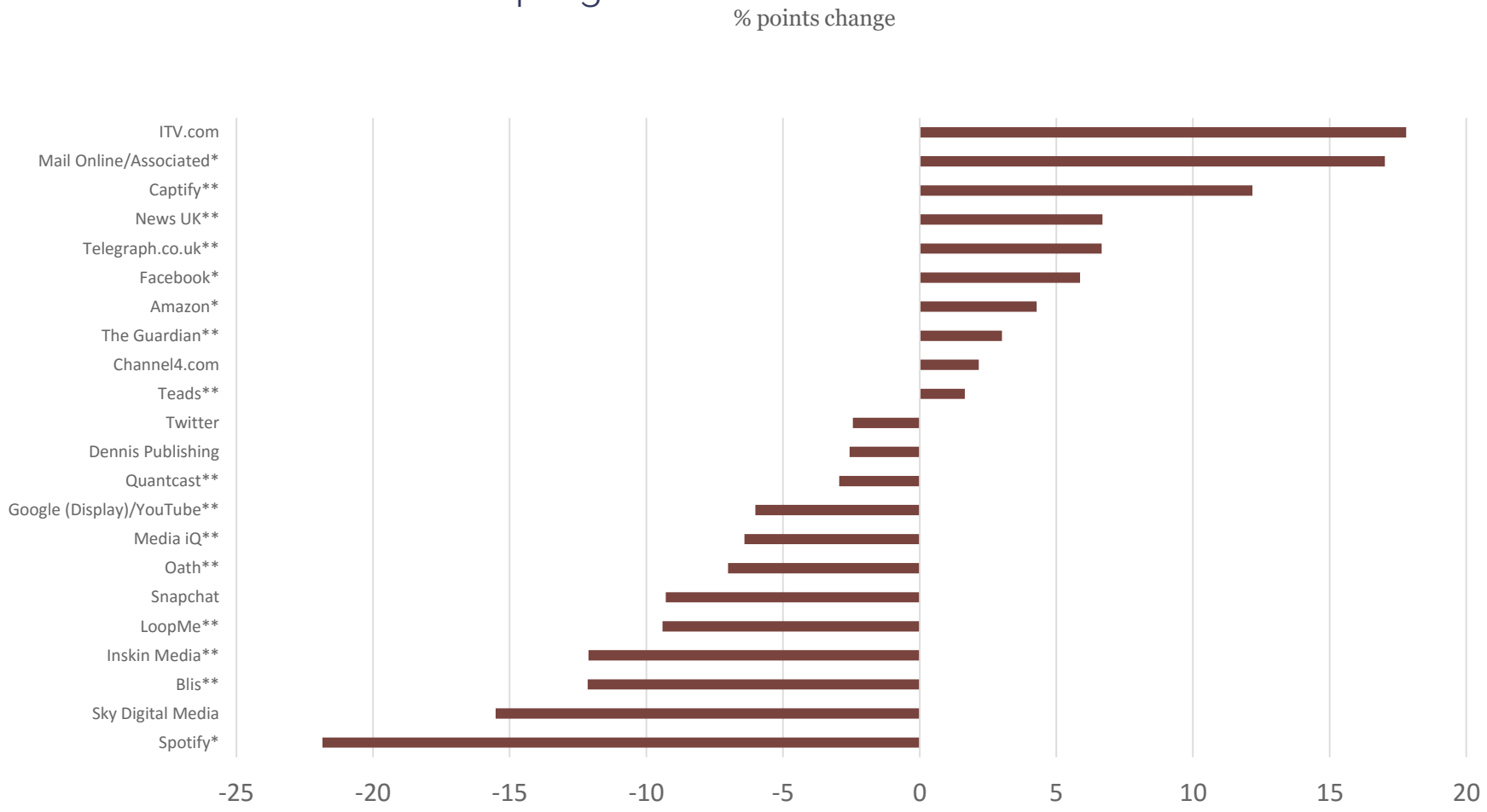

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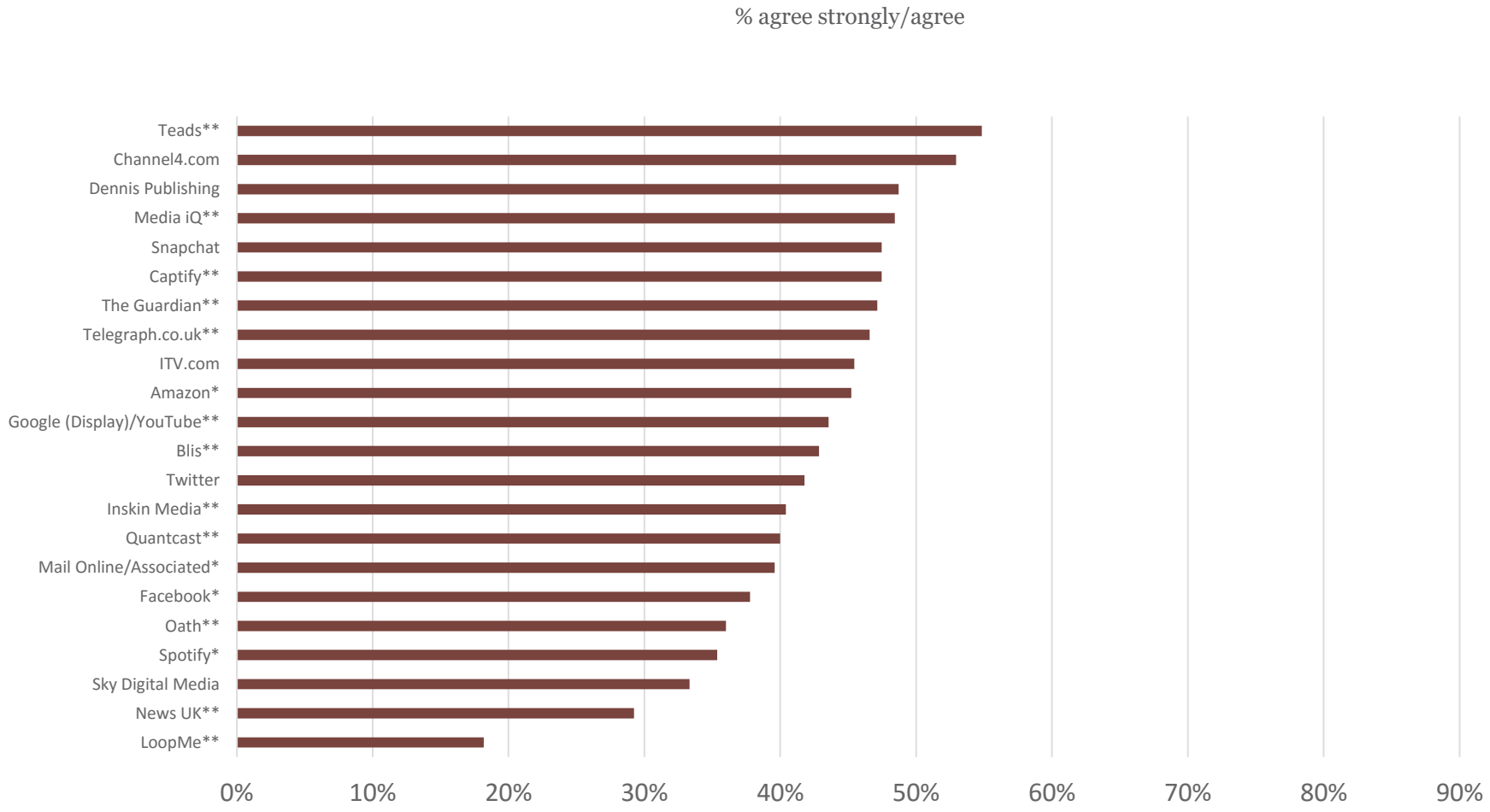
The sales team pro-actively communicate relevant new opportunities Autumn 2018



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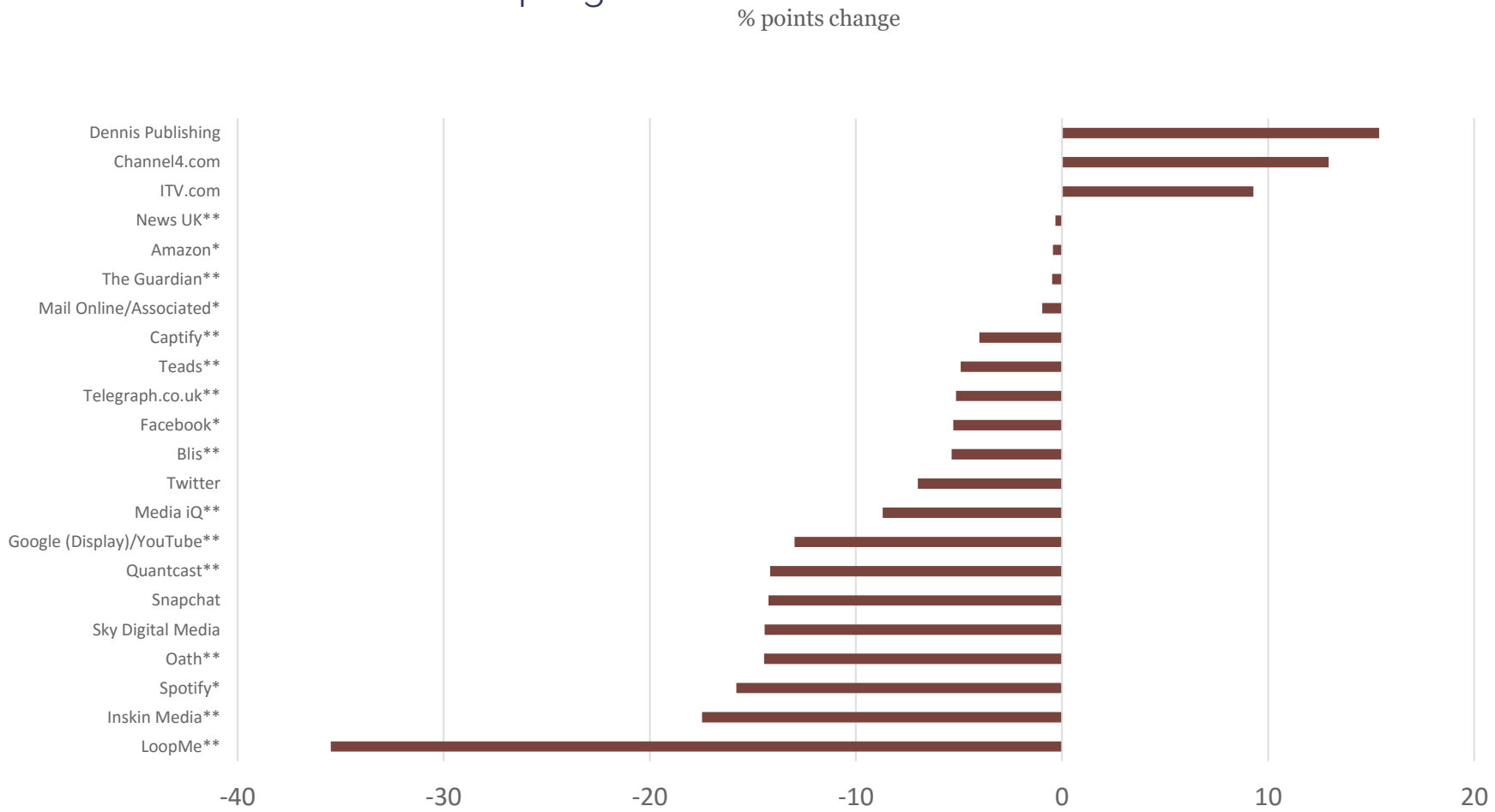
The sales team pro-actively communicate relevant new opportunities Autumn 2018 vs Spring 2018



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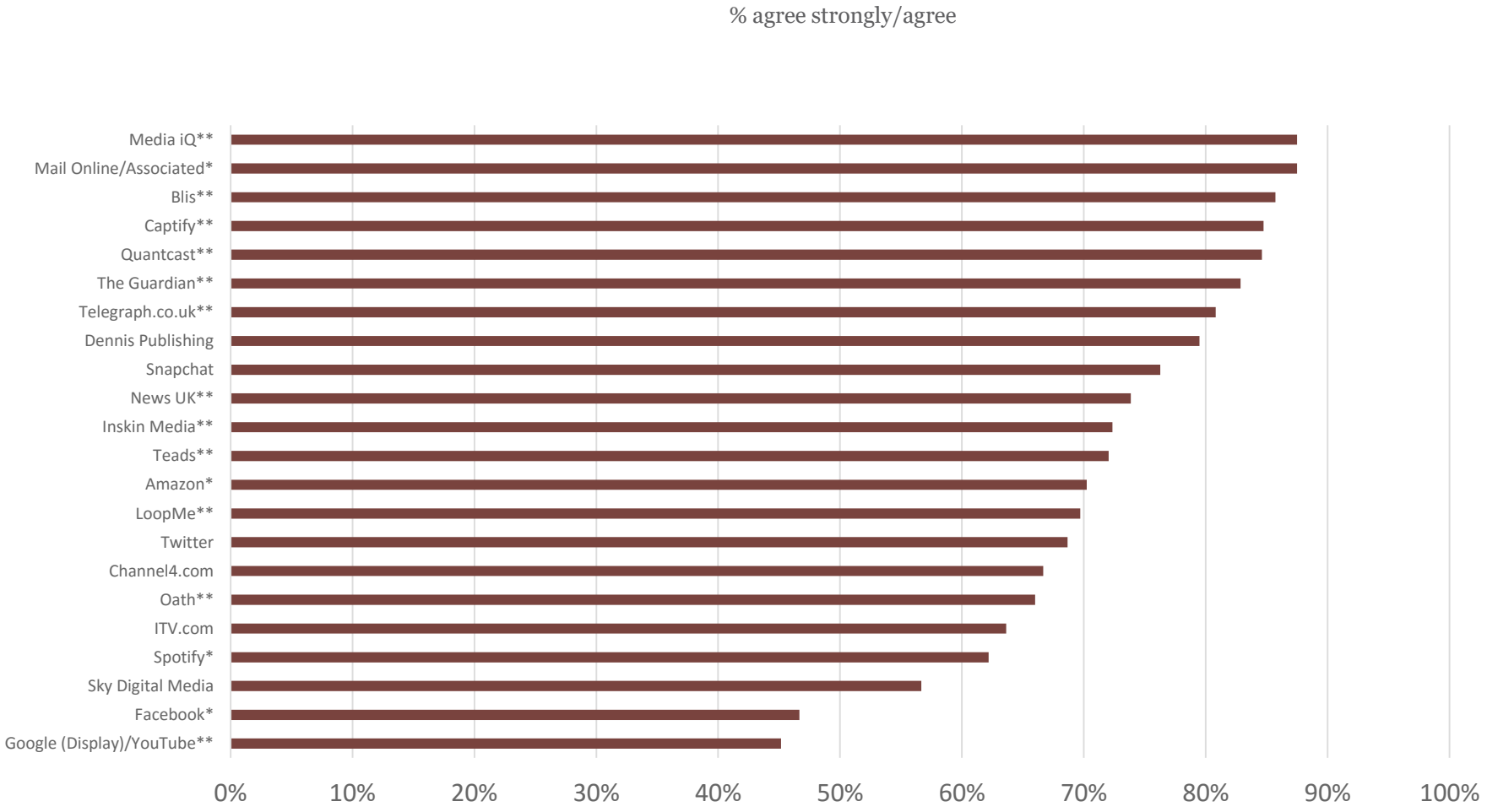
It's easy to contact the sales team
Autumn 2018



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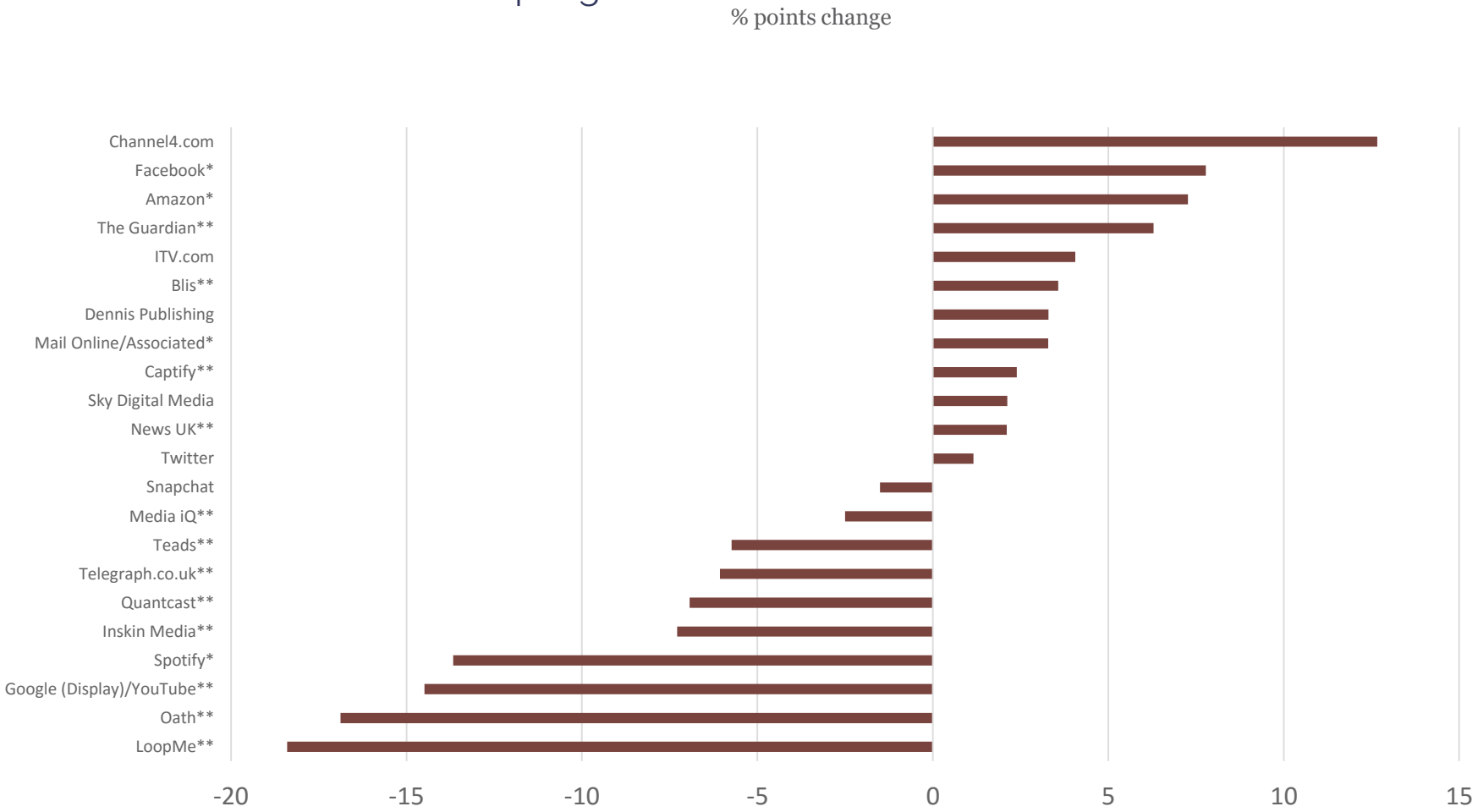
It's easy to contact the sales team
Autumn 2018 vs Spring 2018



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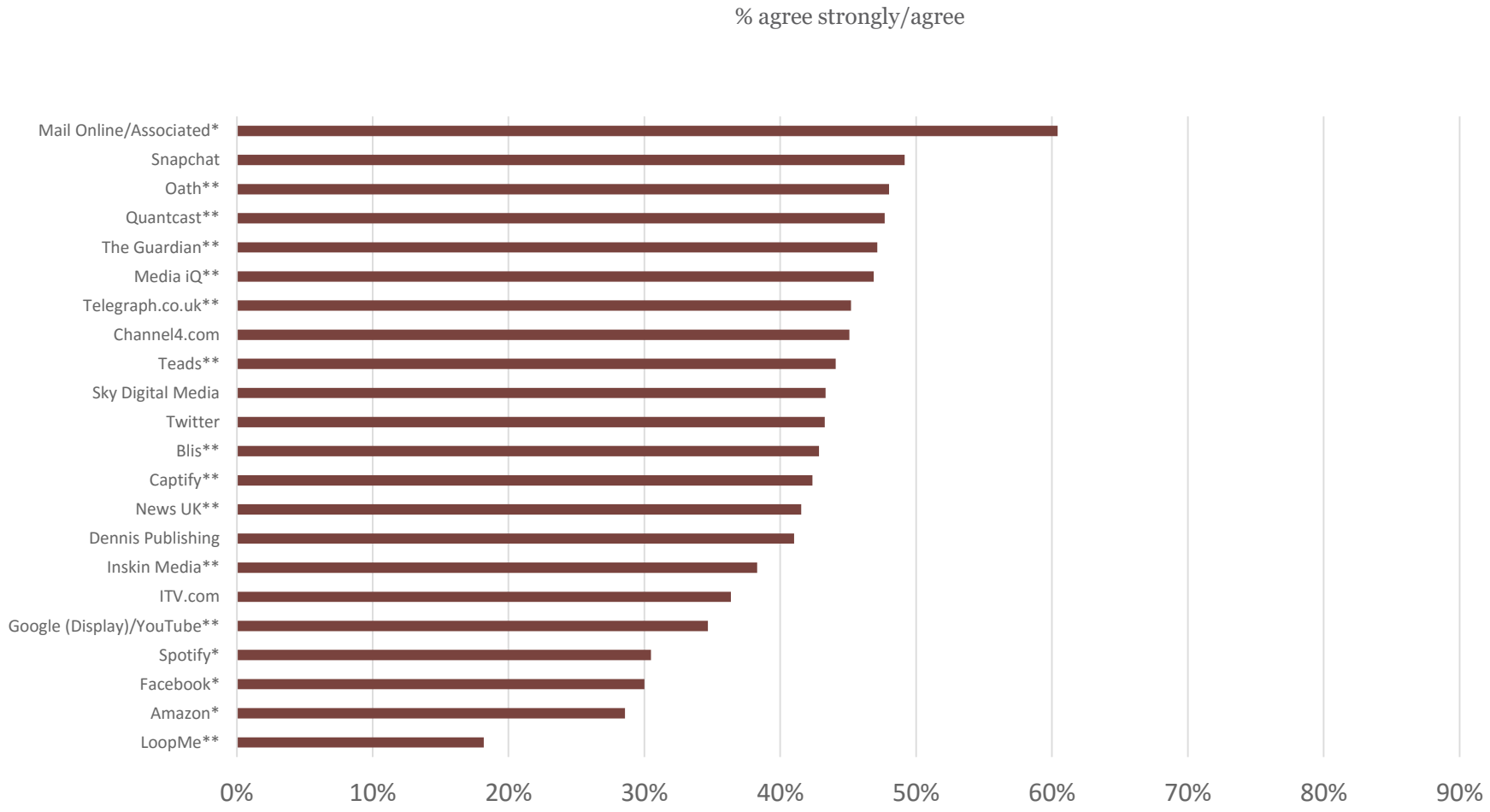
I have regular constructive face-to-face or telephone contact with the sales team Autumn 2018



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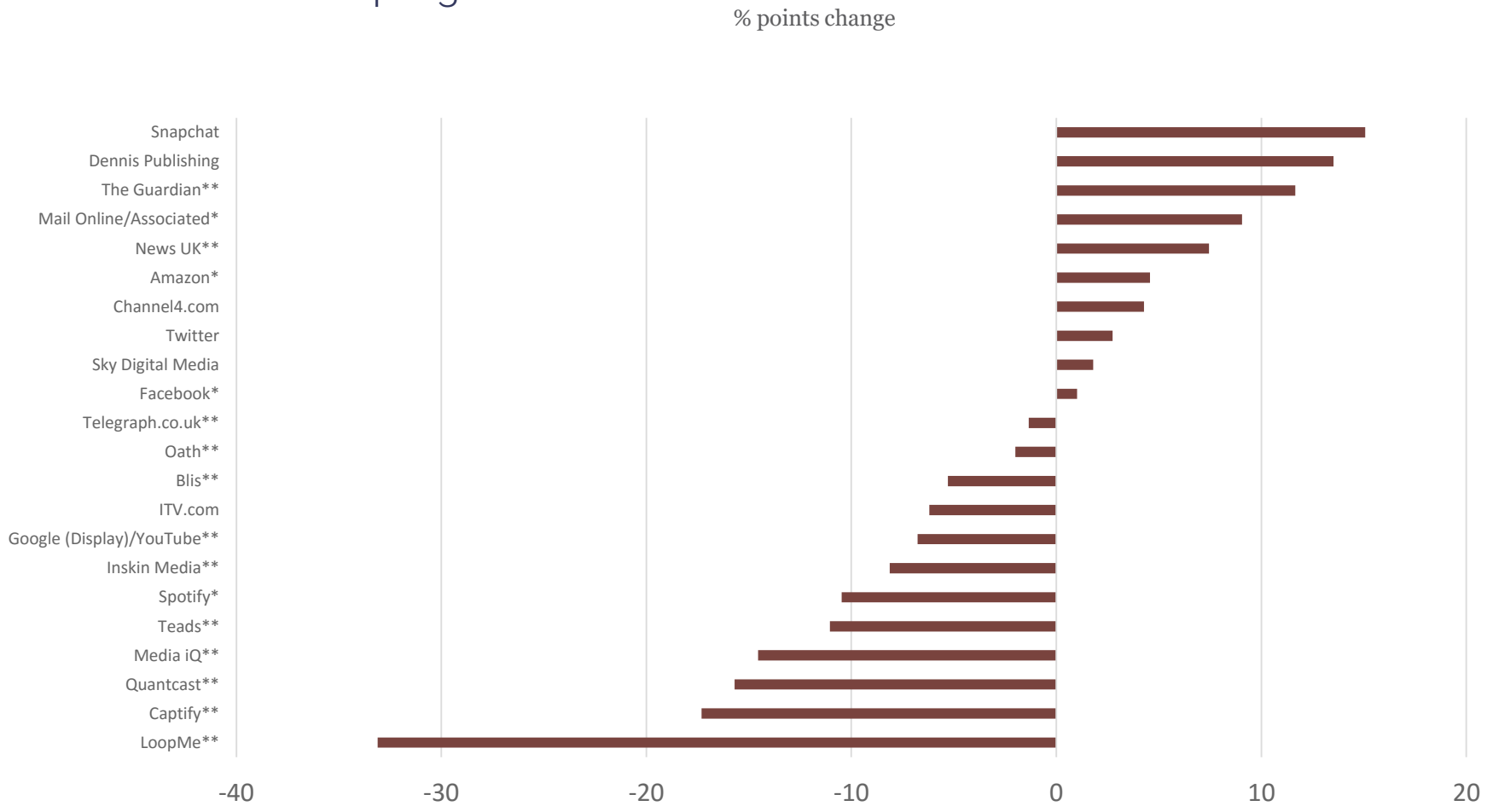
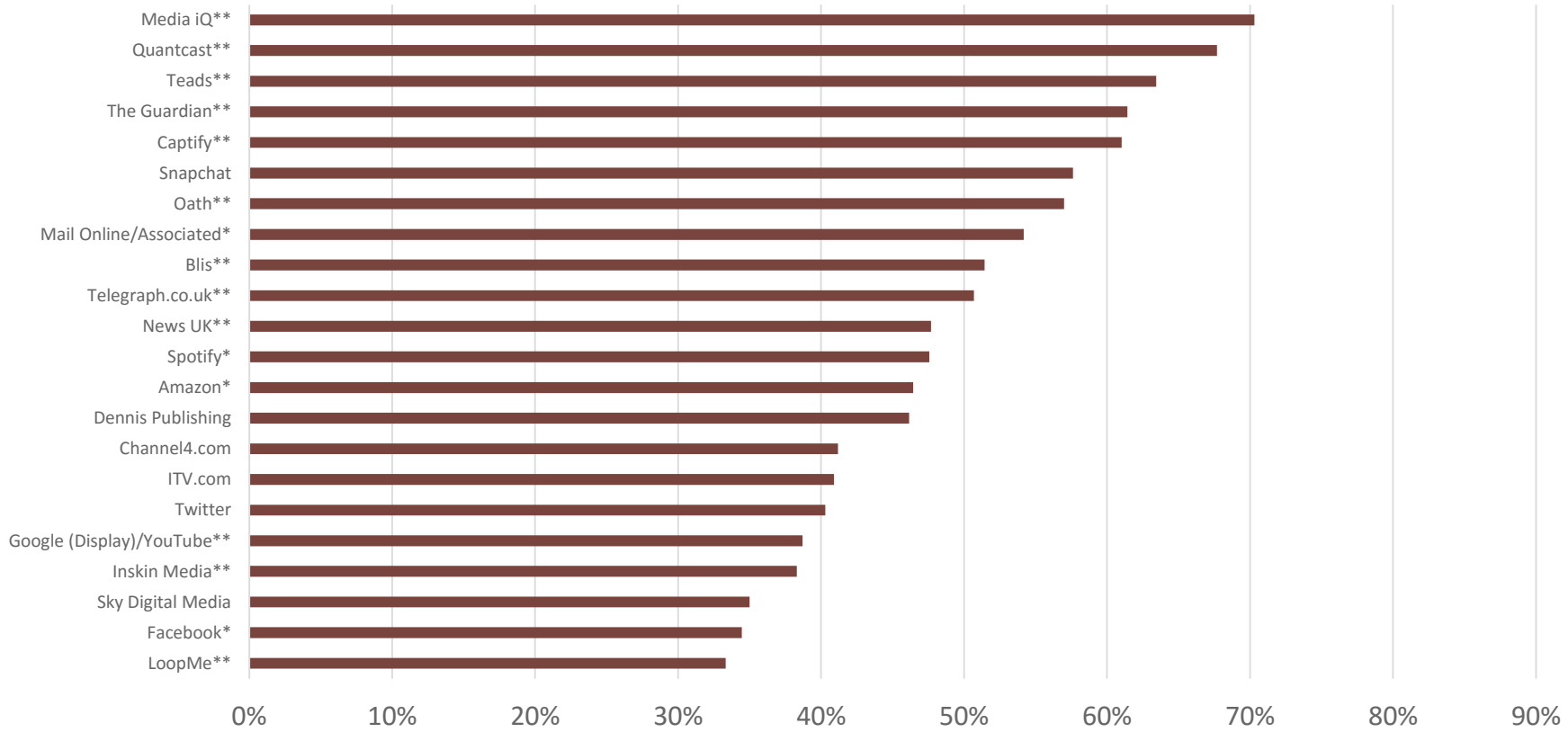
I have regular constructive face-to-face or telephone contact with the sales team Autumn 2018 vs Spring 2018



*DTSG Signatory **DTSG Certified

The sales team engenders a real sense of an agency/media owner partnership Autumn 2018

% agree strongly/agree



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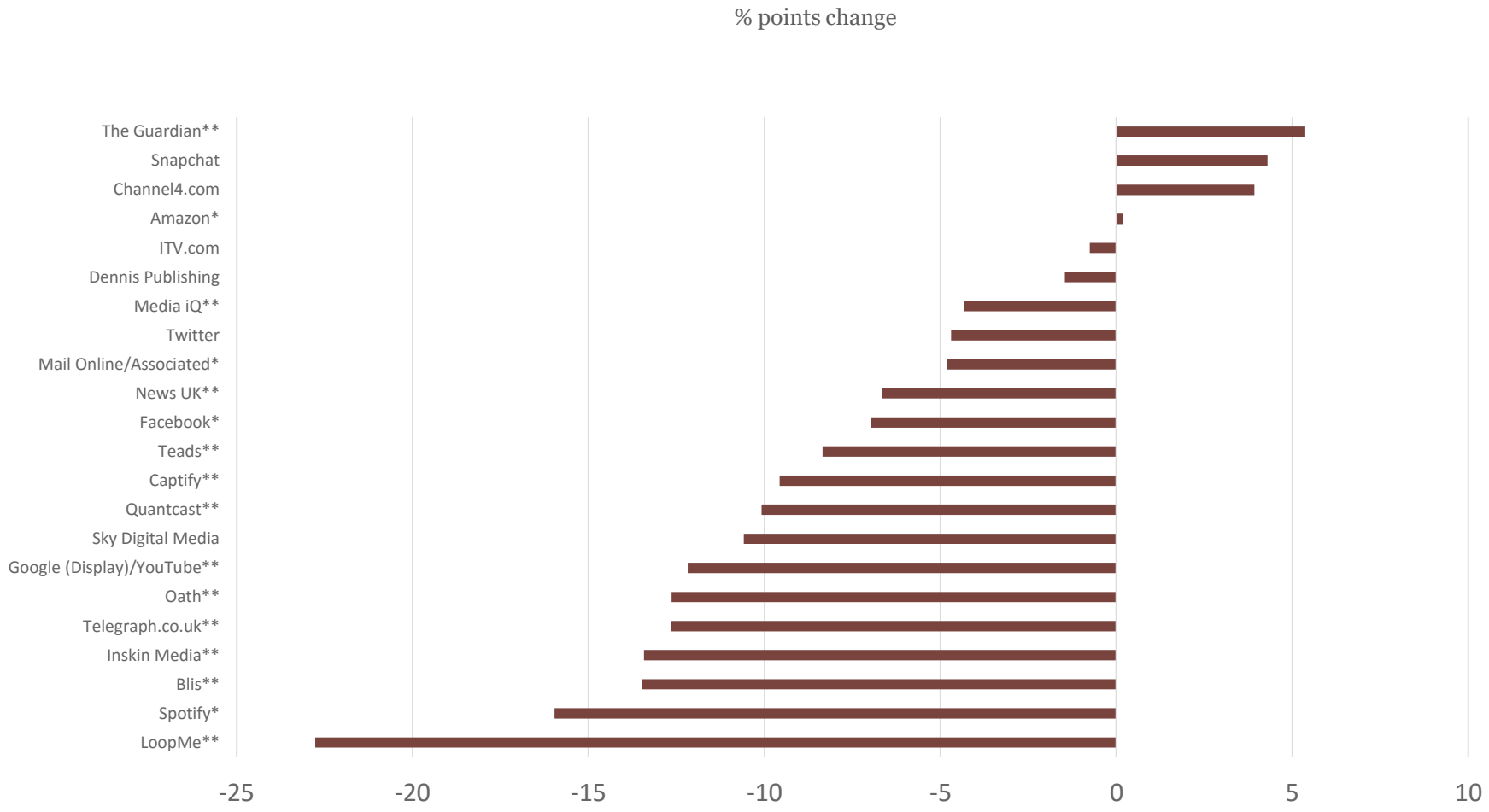

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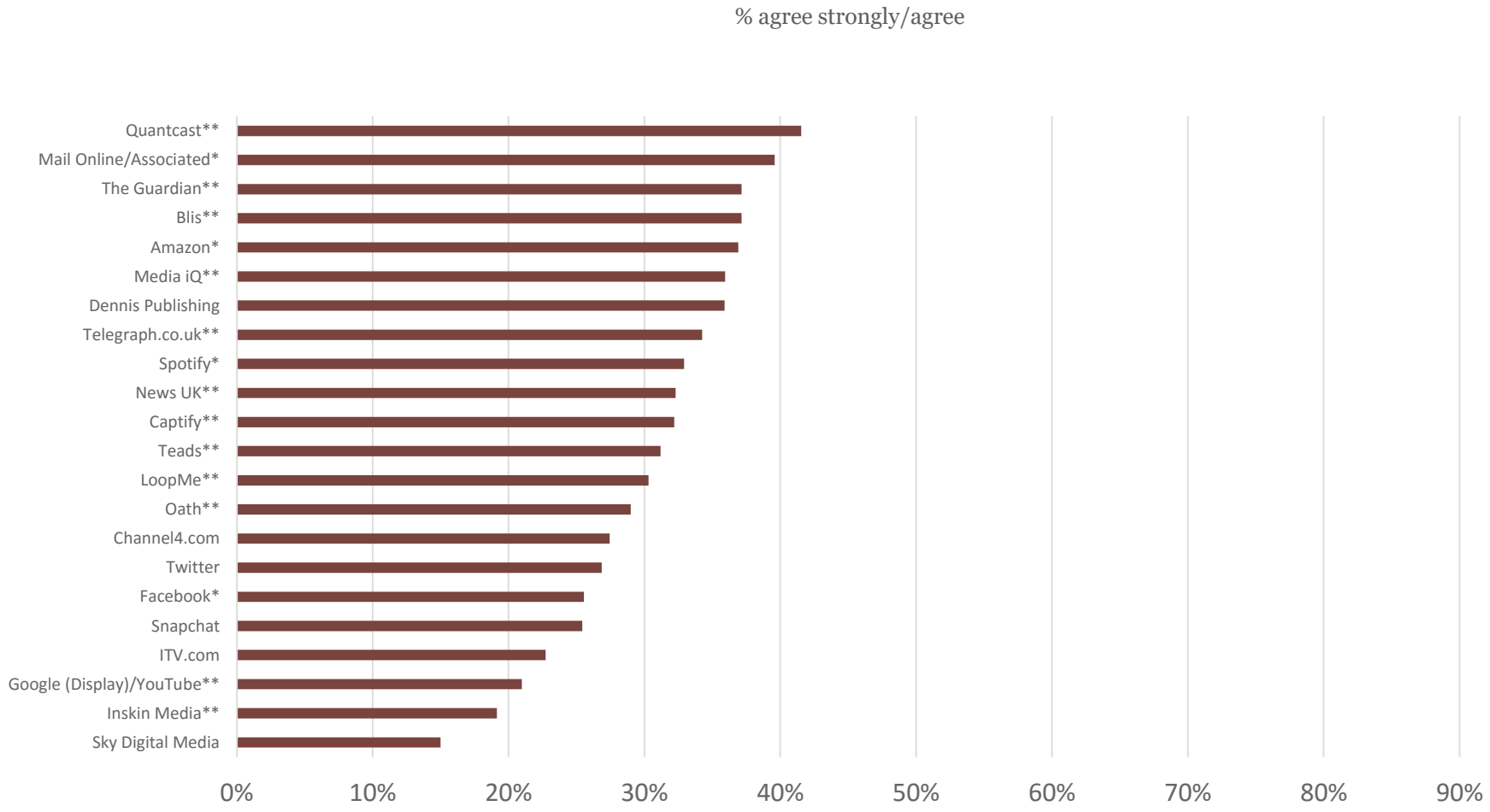
The media owner successfully communicates direct contact they have with clients Autumn 2018



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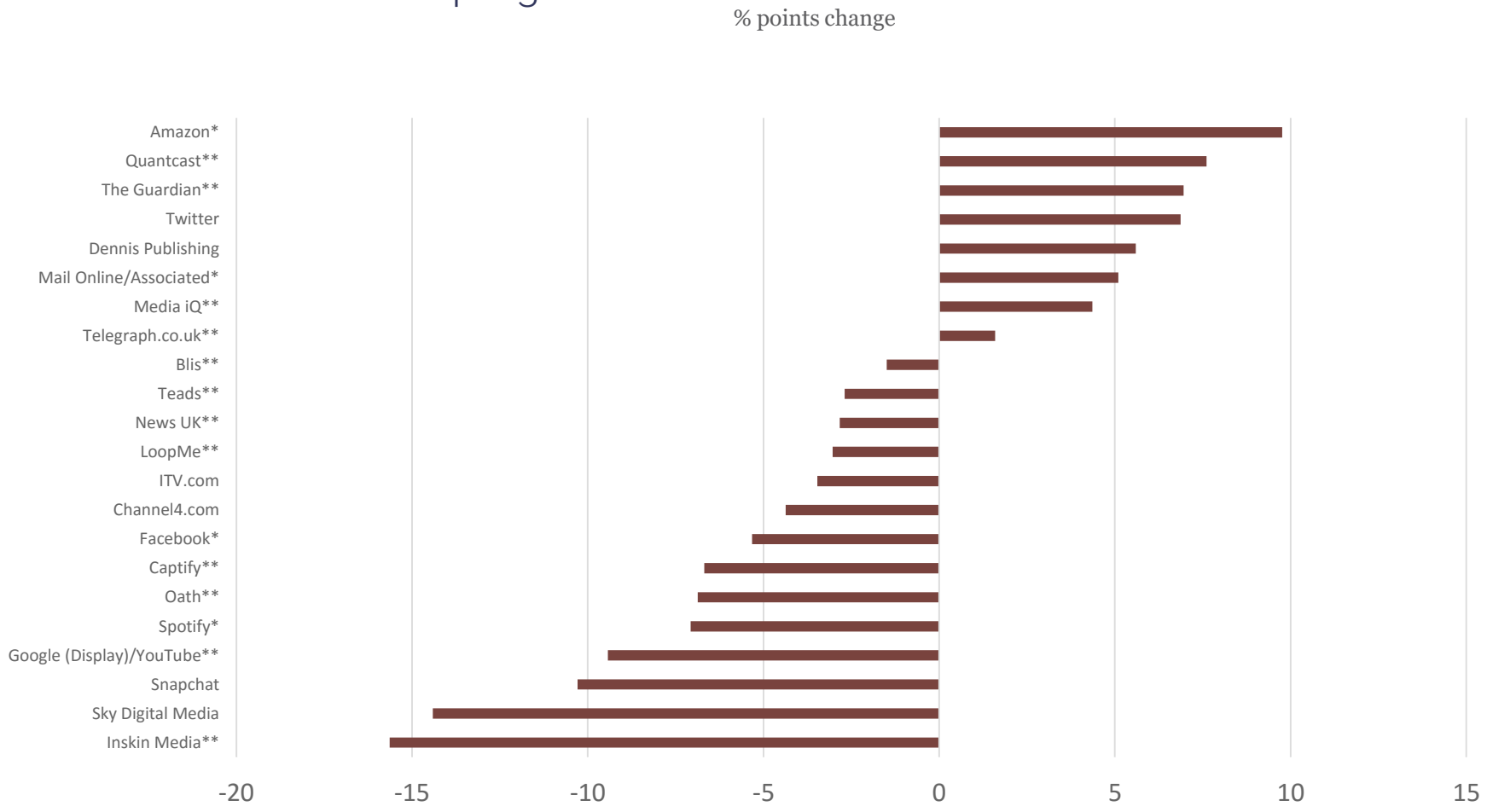
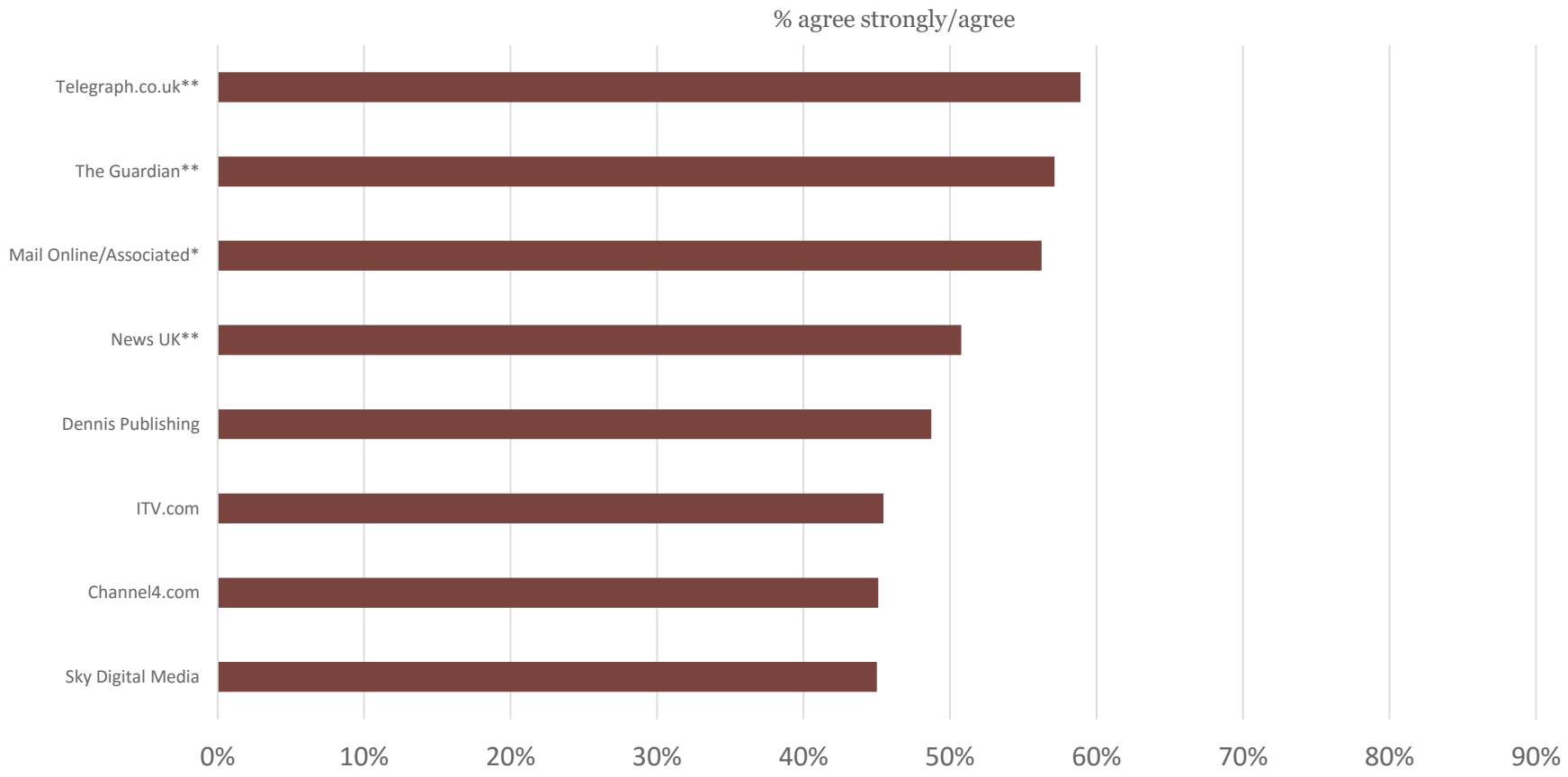
The media owner successfully communicates direct contact they have with clients Autumn 2018 vs Spring 2018



*DTSG Signatory **DTSG Certified

The media owner demonstrates a good understanding of how cross-media opportunities can be exploited
Autumn 2018



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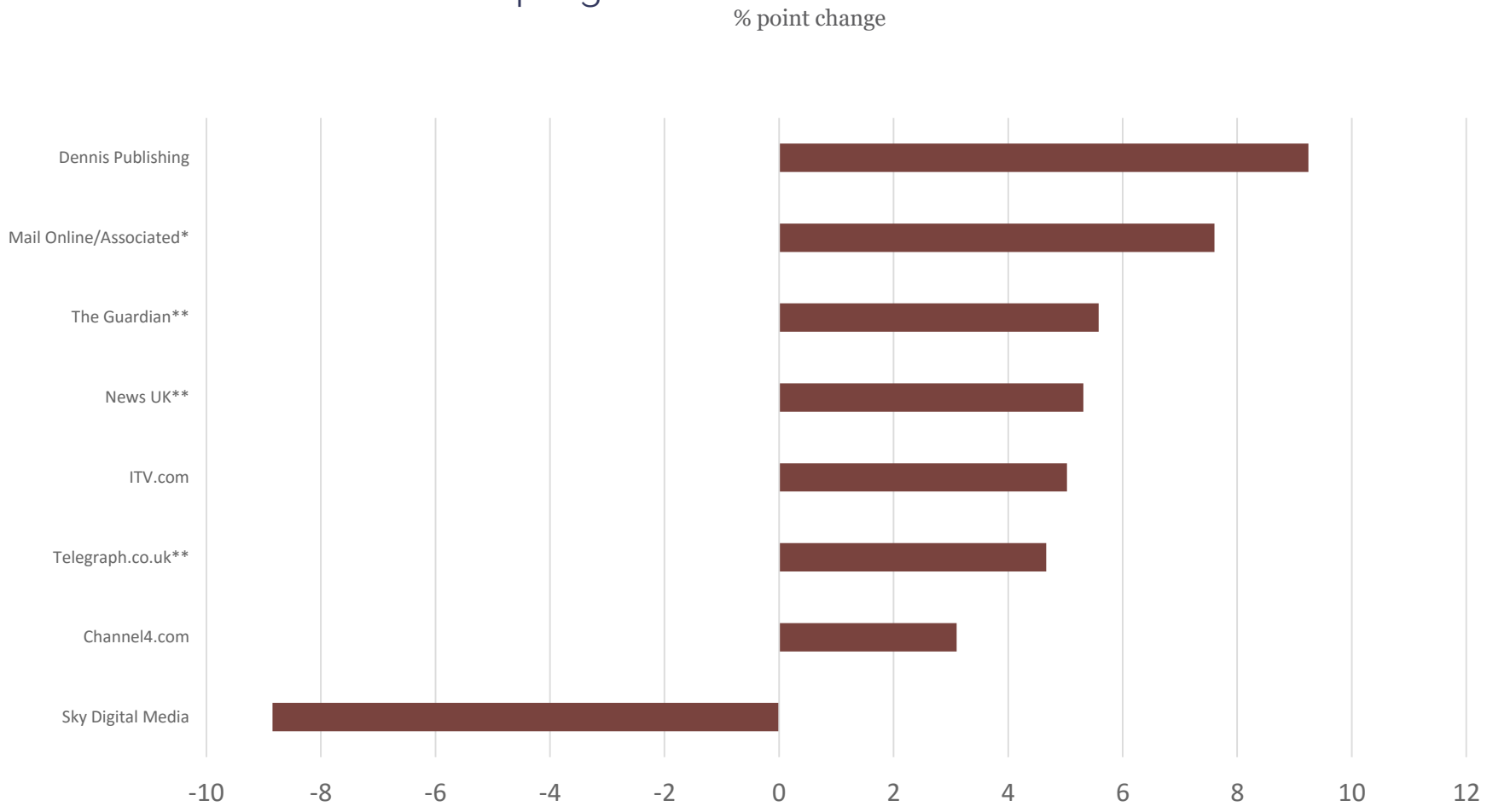
My overall experience of dealing with this supplier is a good one
Autumn 2018 vs Spring 2018



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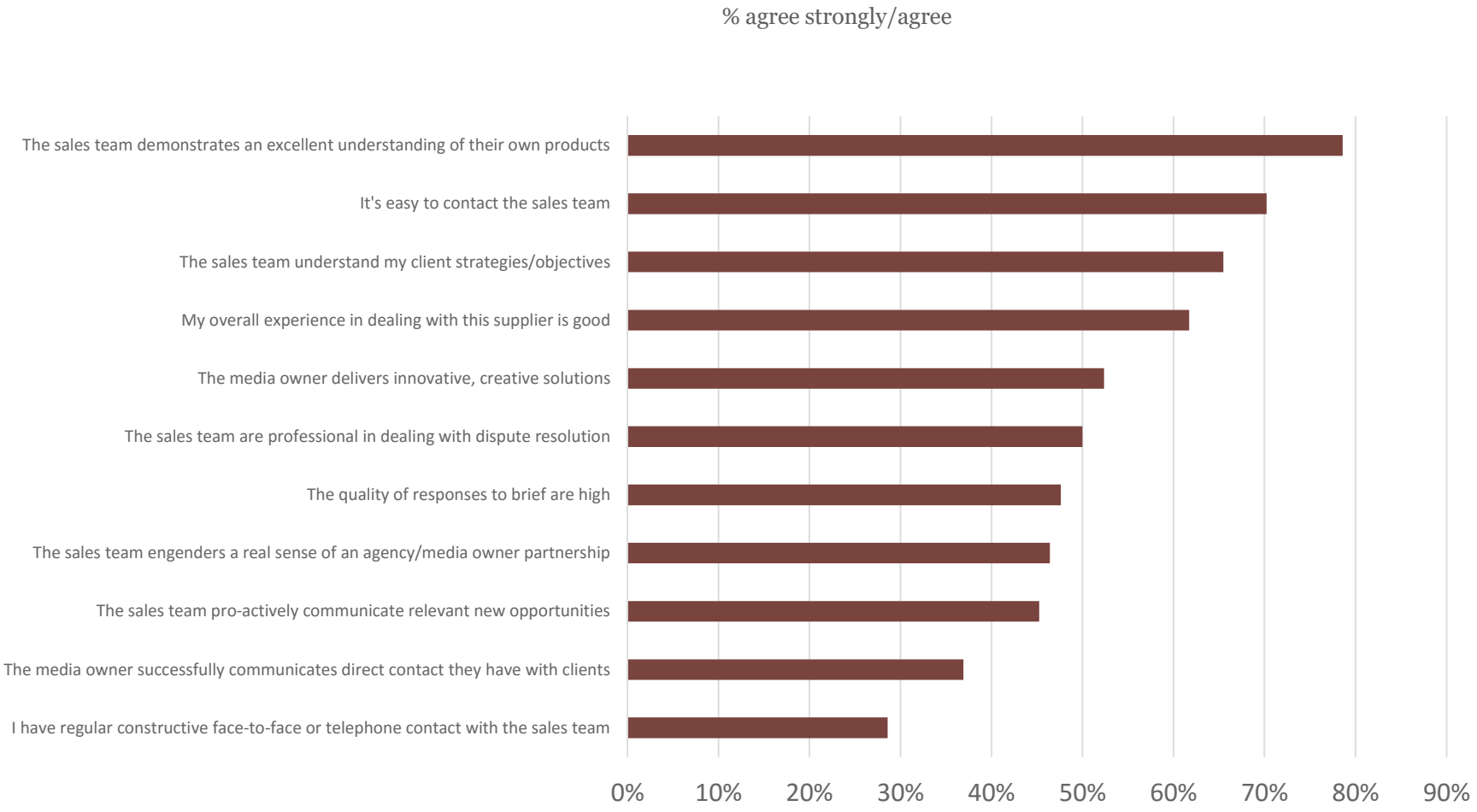
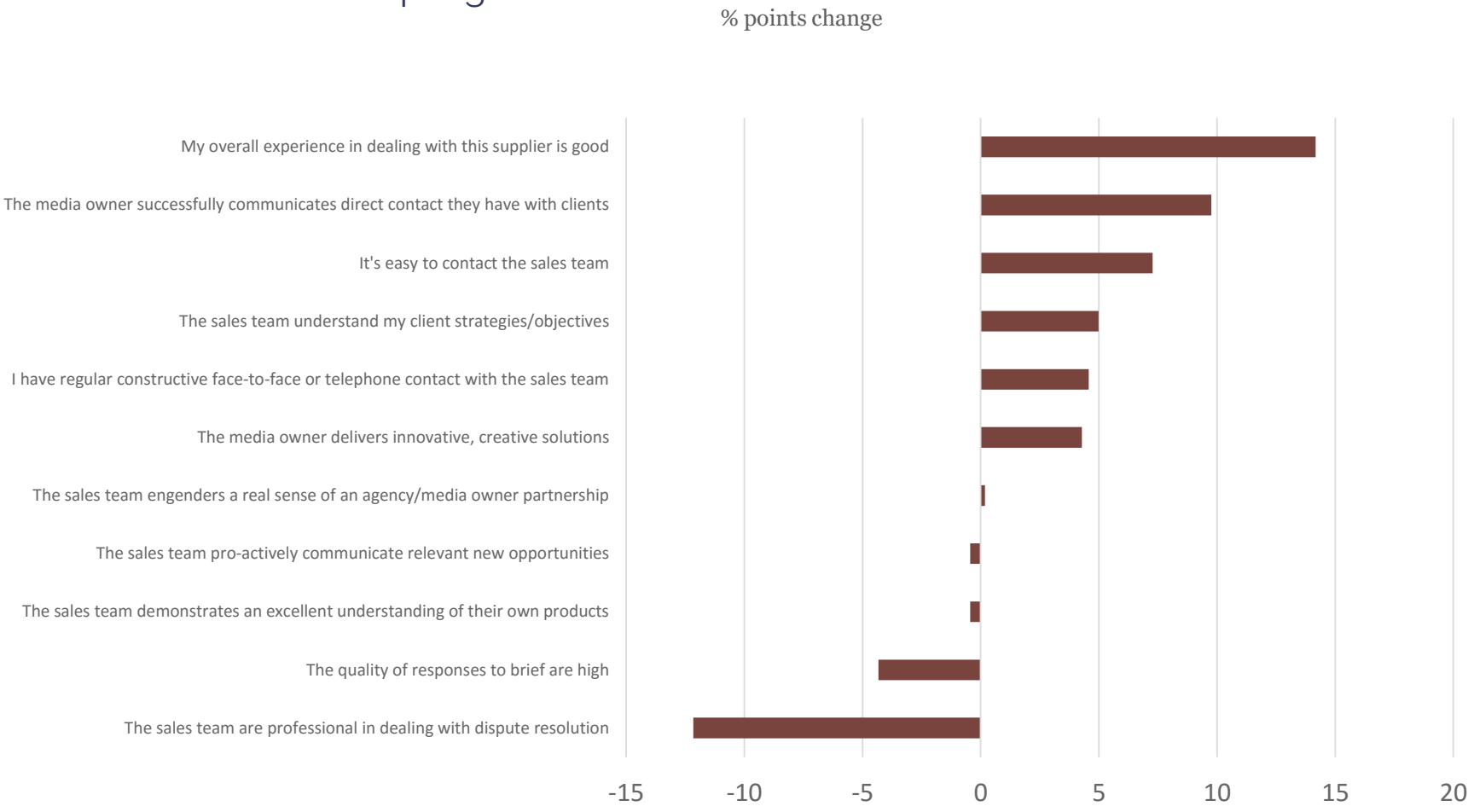
Rankings by Supplier
% strongly agree/agree

Amazon*
Autumn 2018



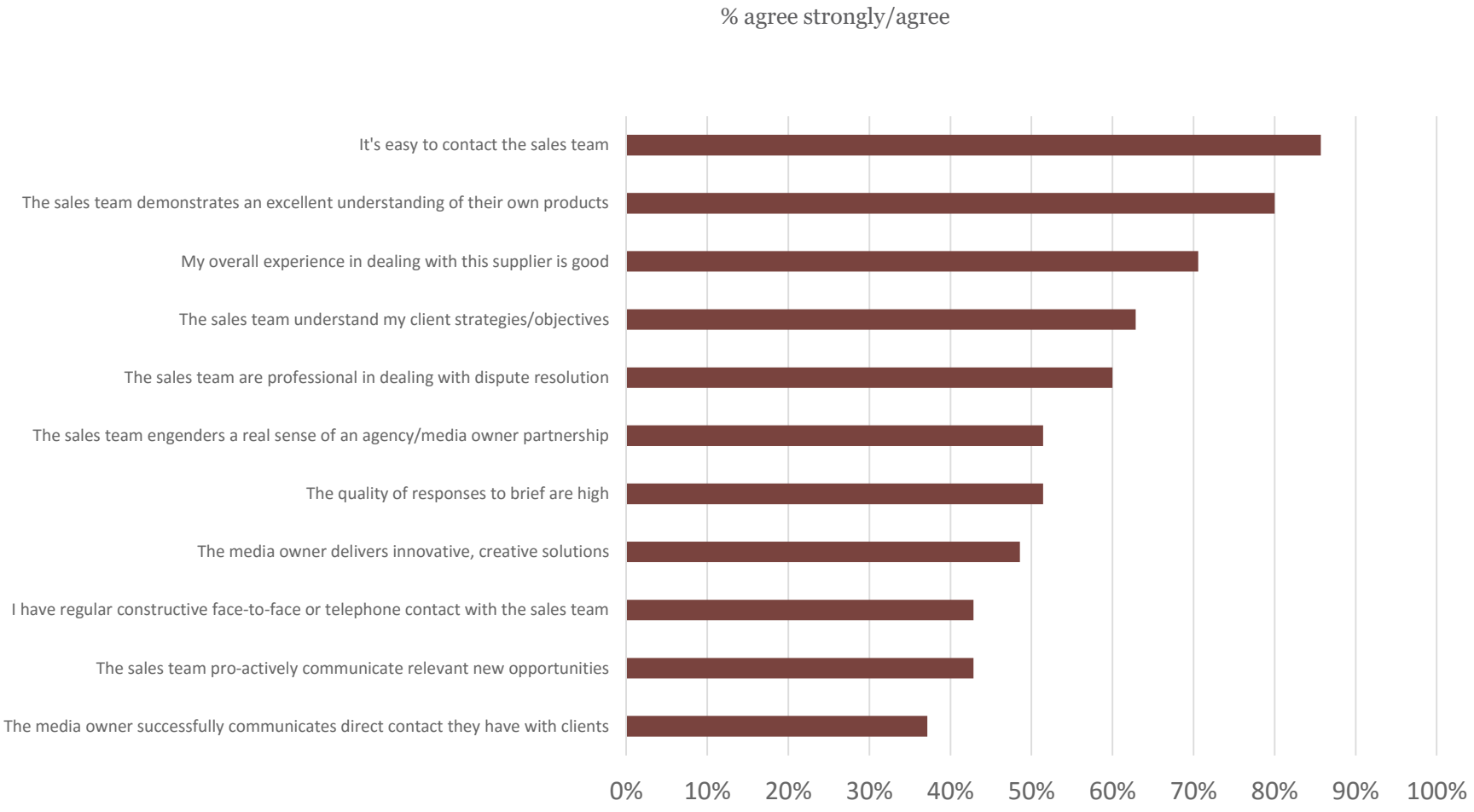
*DTSG Signatory

Amazon*
Autumn 2018 vs Spring 2018



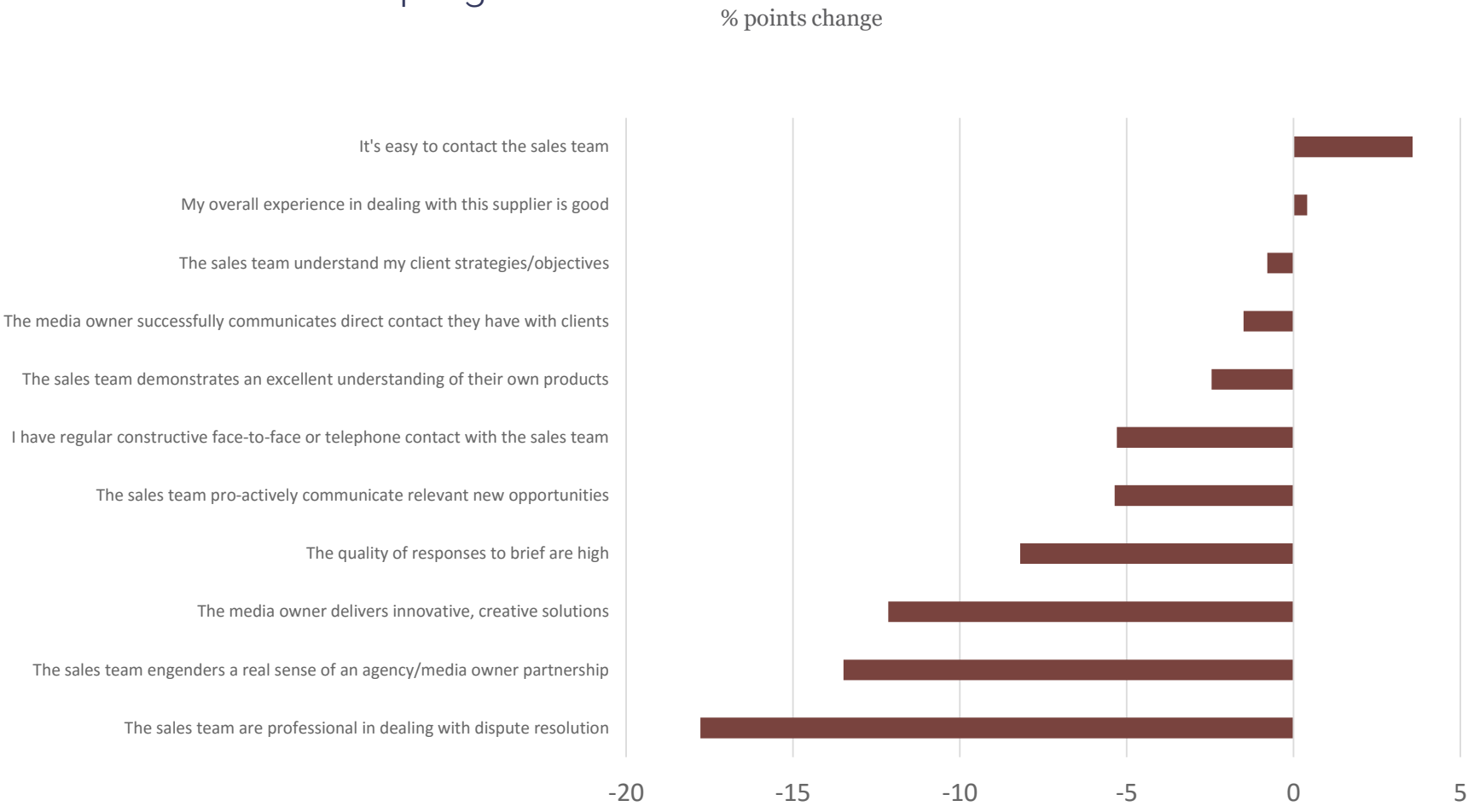
*DTSG Signatory

Blis**
Autumn 2018



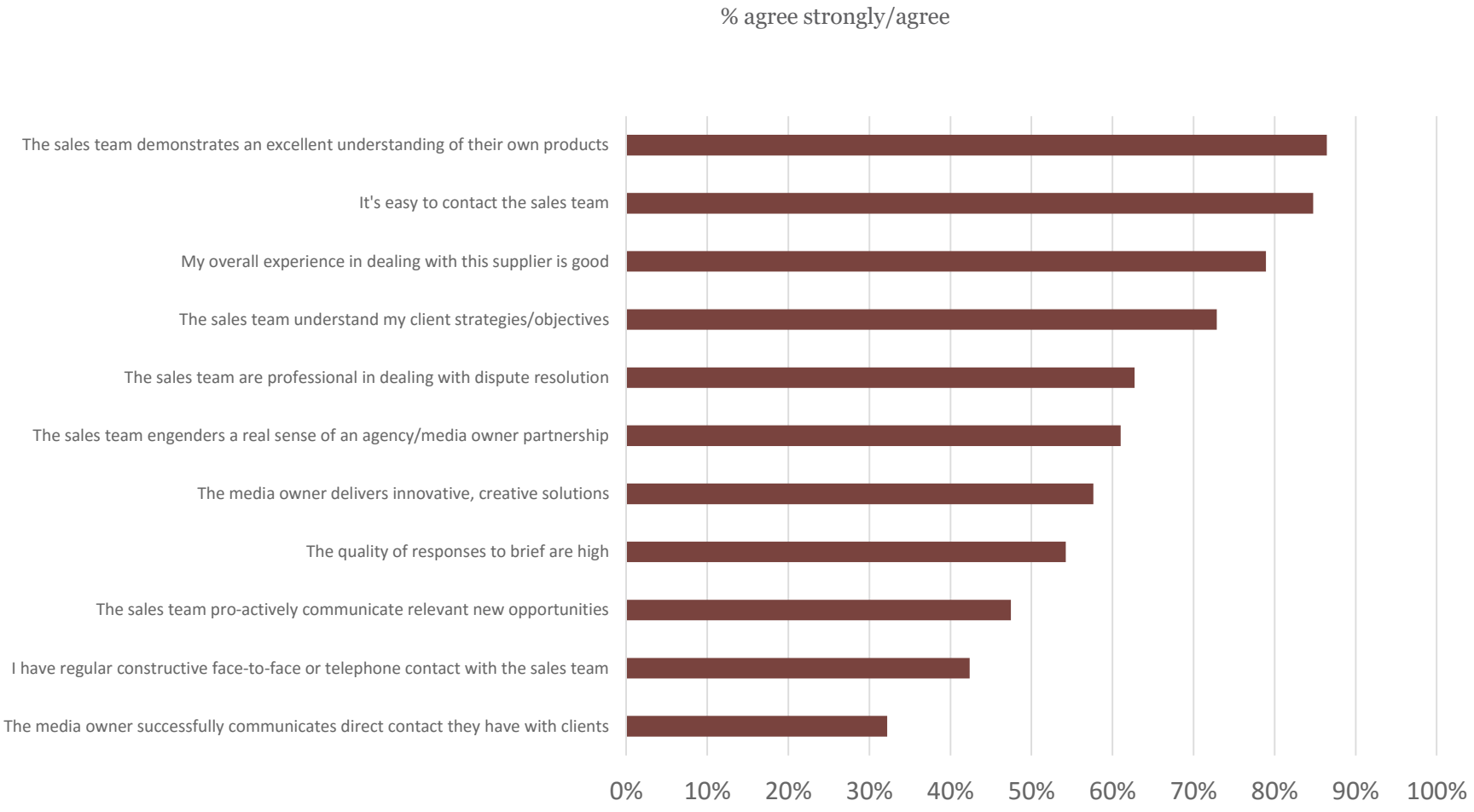
**DTSG Certified

Blis**
Autumn 2018 vs Spring 2018



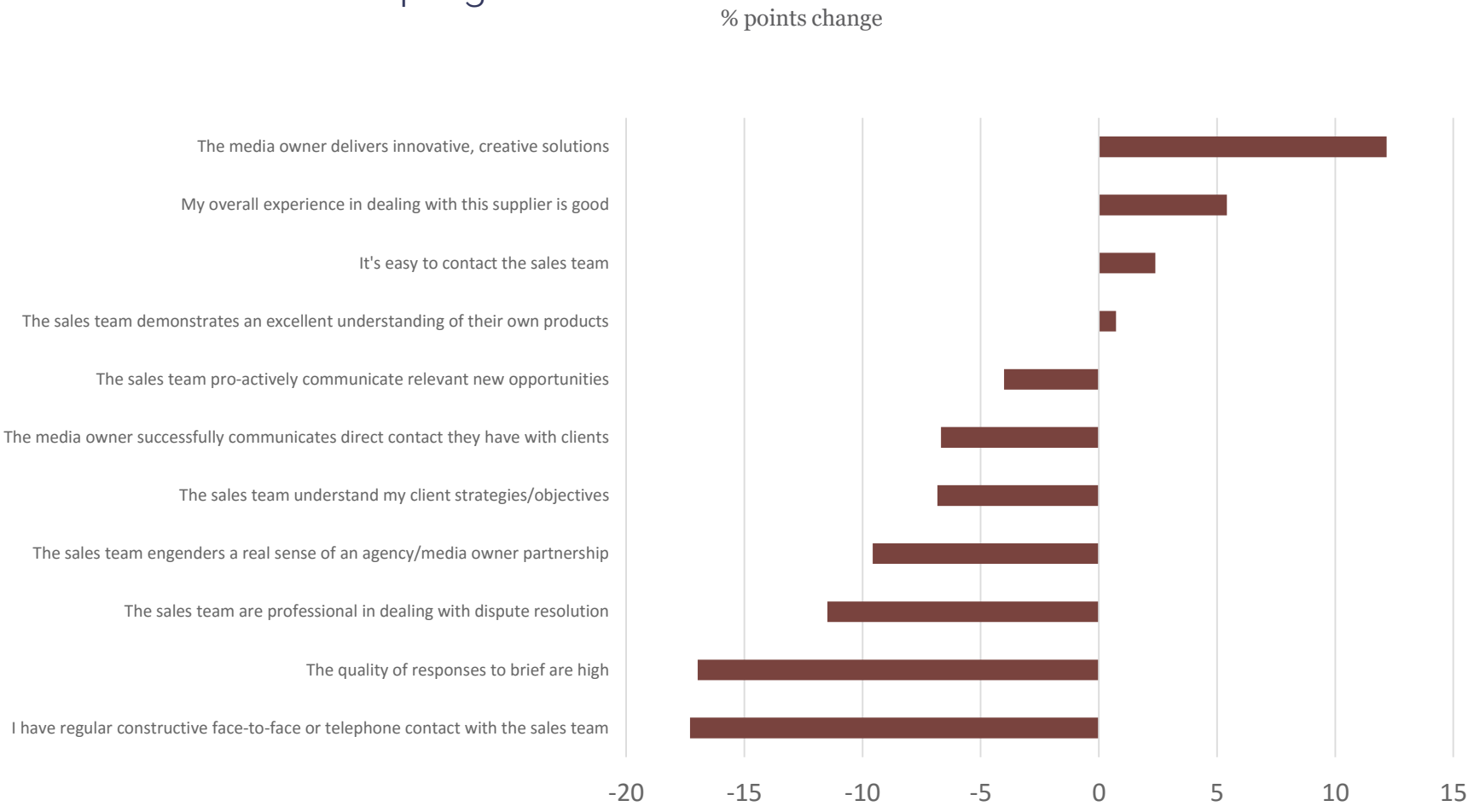
**DTSG Certified

Captify**
Autumn 2018



**DTSG Certified

Captify**
Autumn 2018 vs Spring 2018



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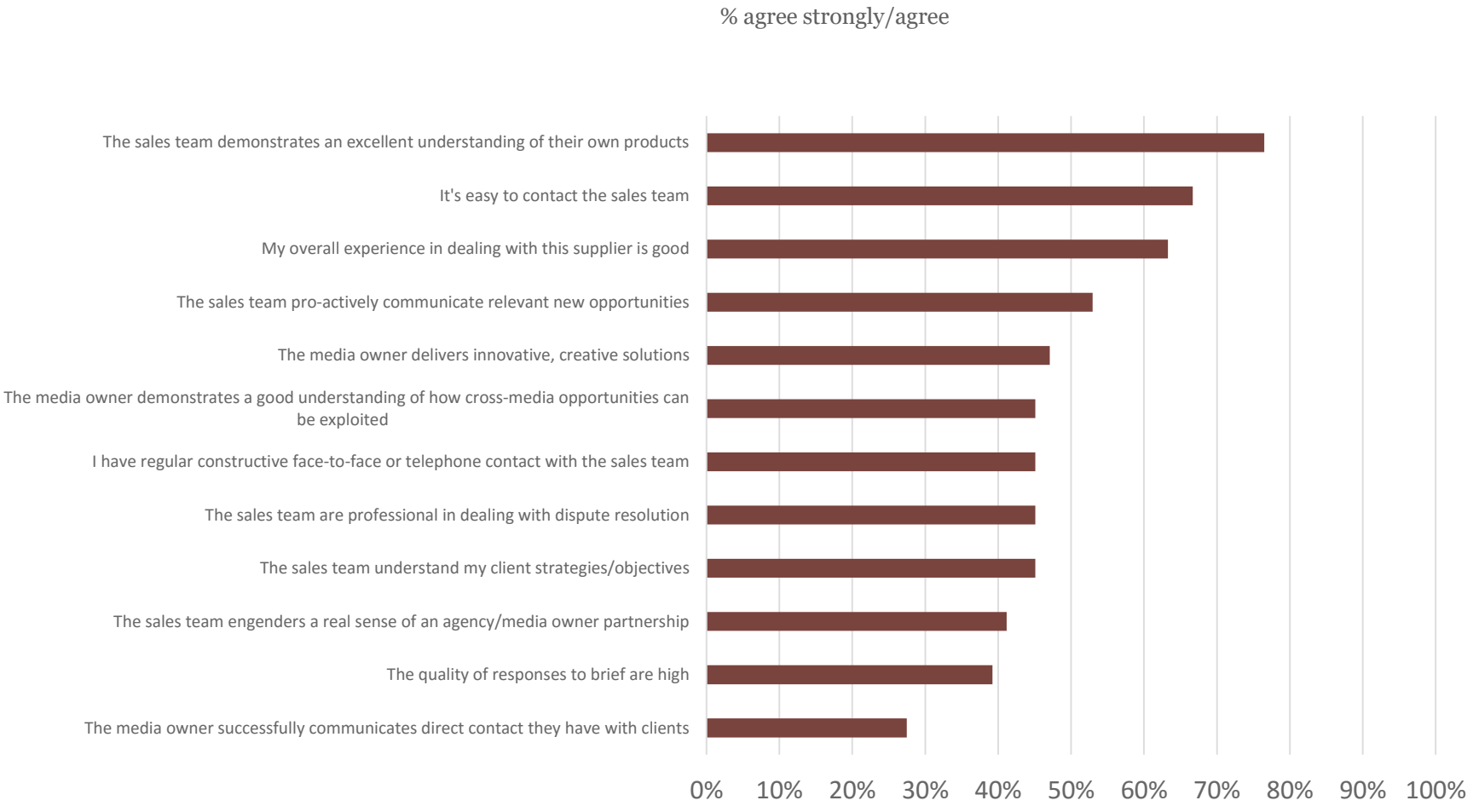
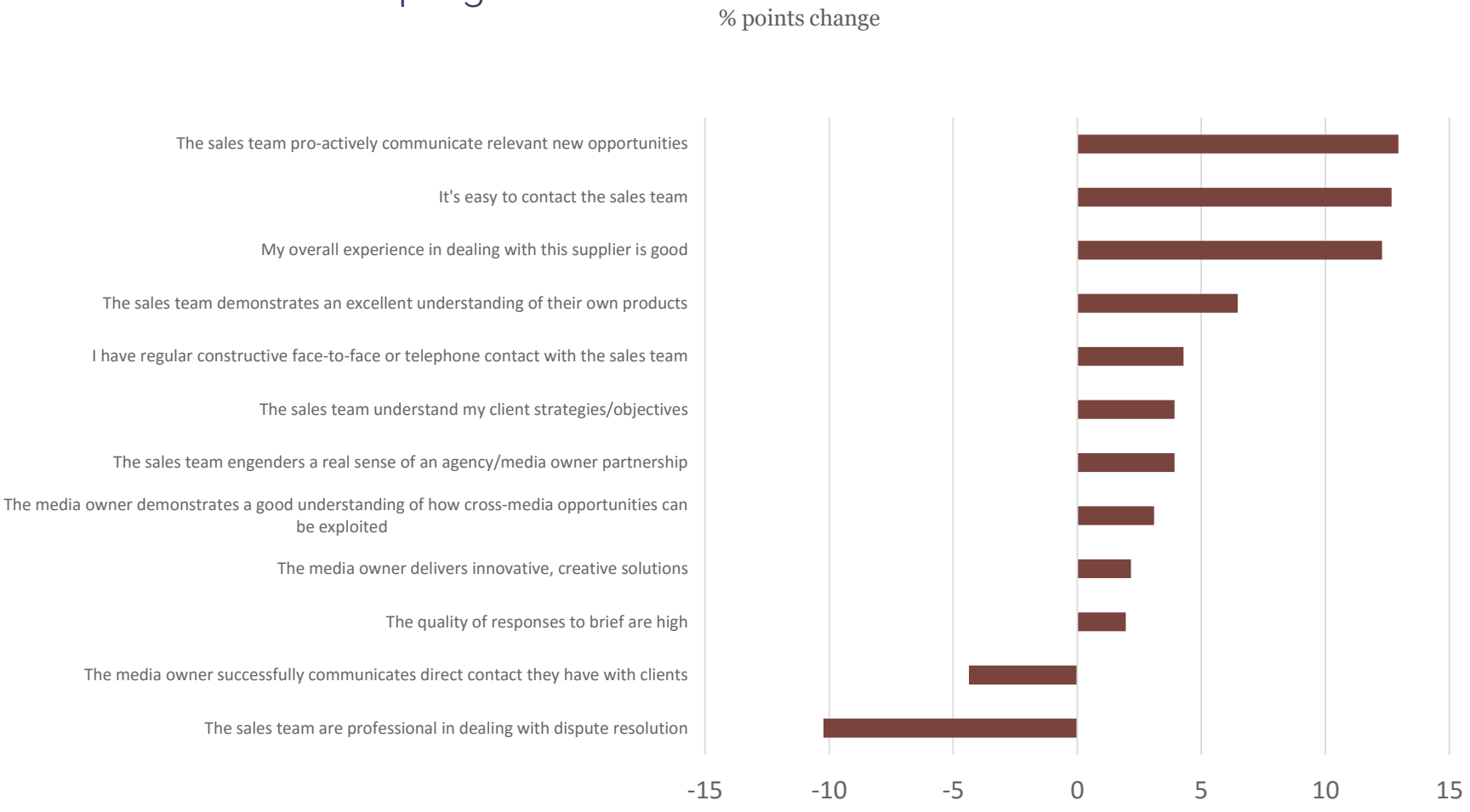
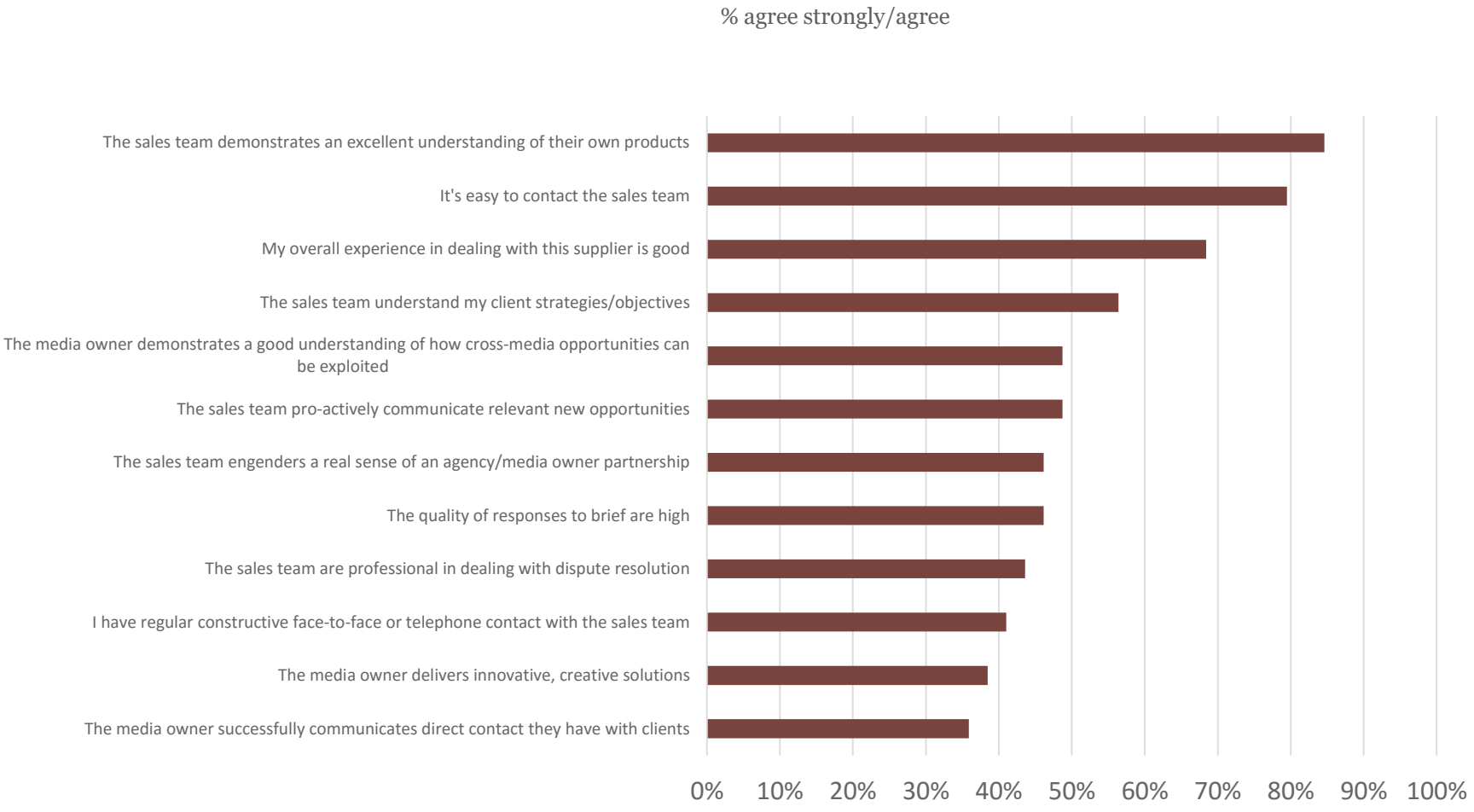
Channel4.com
Autumn 2018



Channel4.com
Autumn 2018 vs Spring 2018



Dennis Publishing
Autumn 2018



Dennis Publishing
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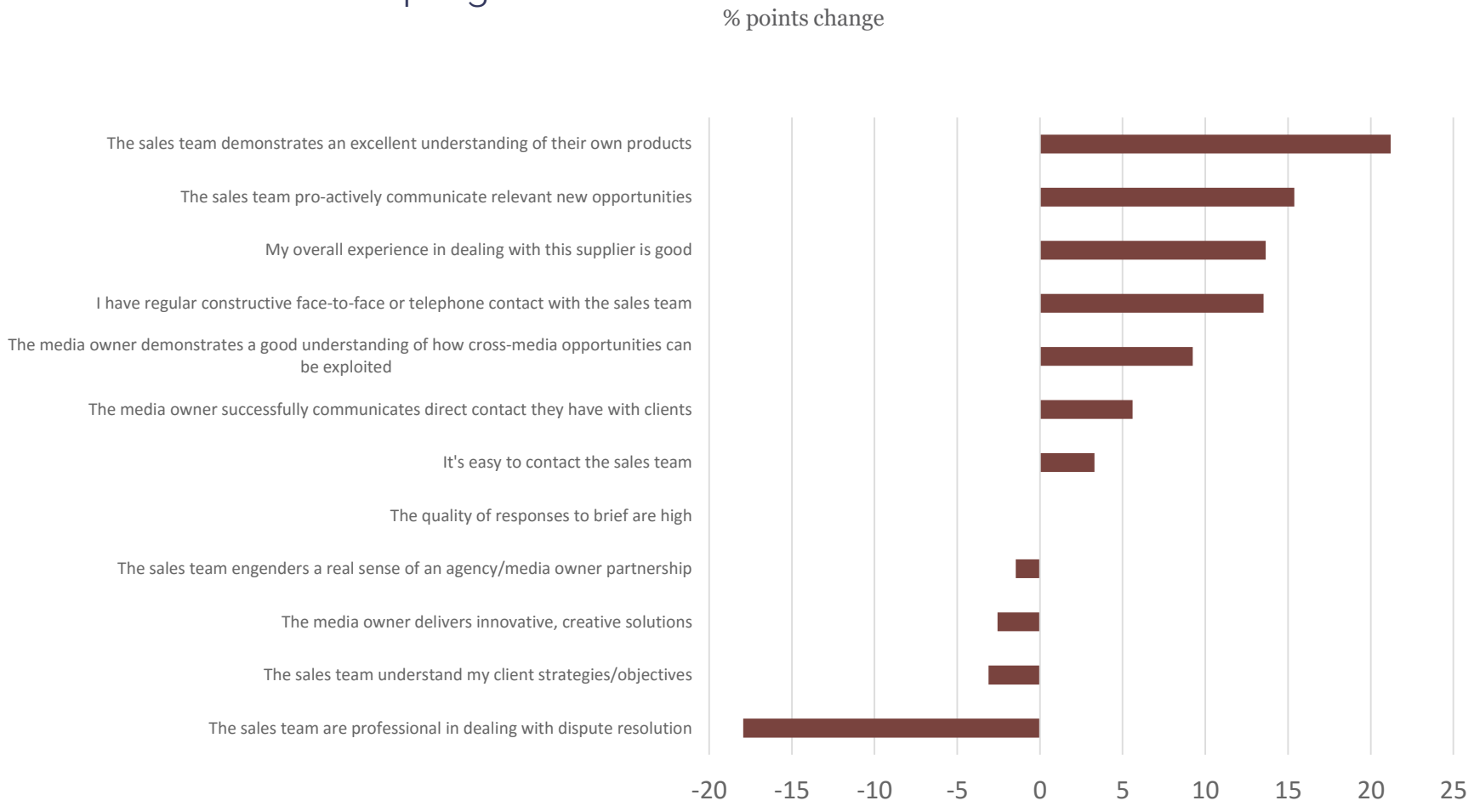
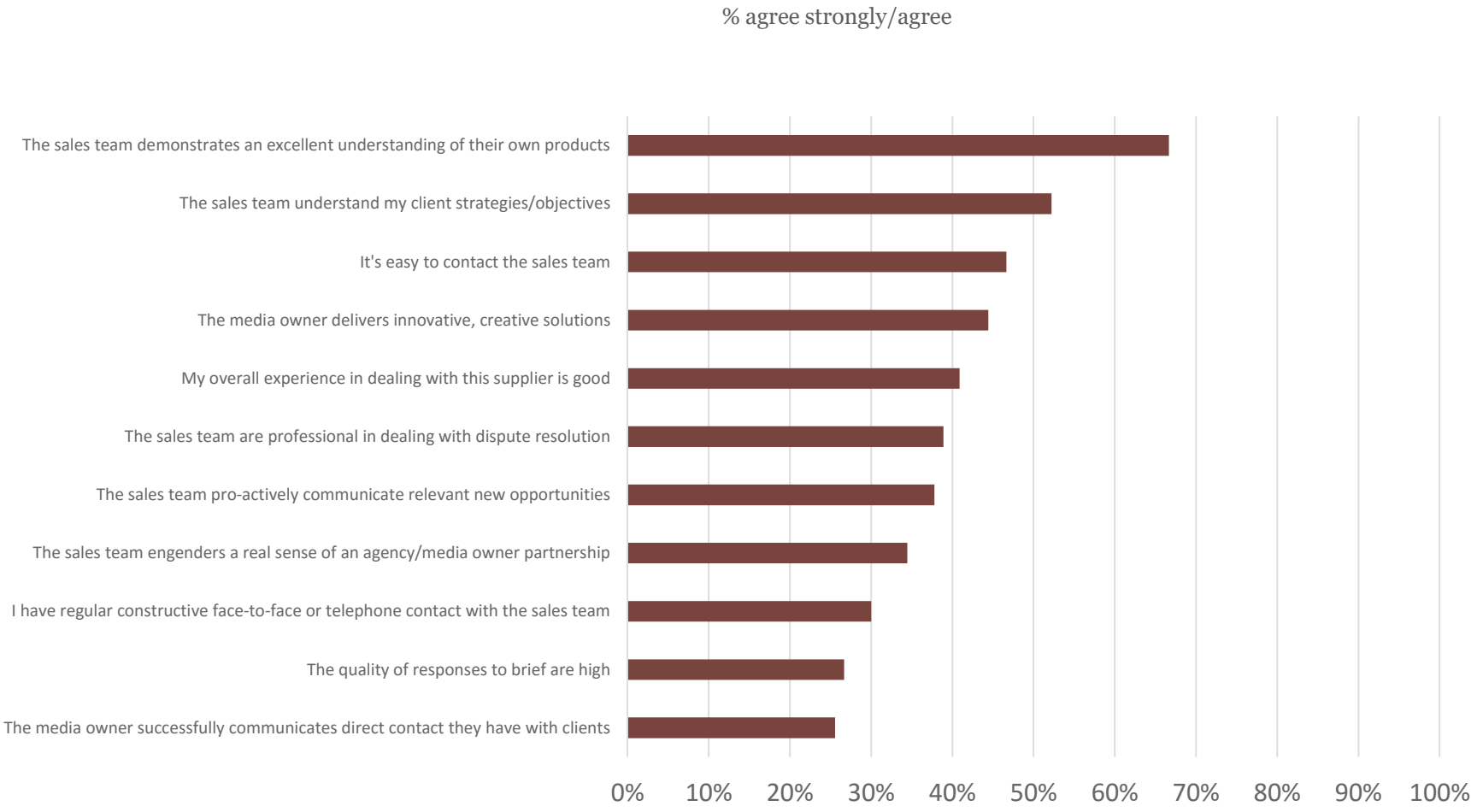
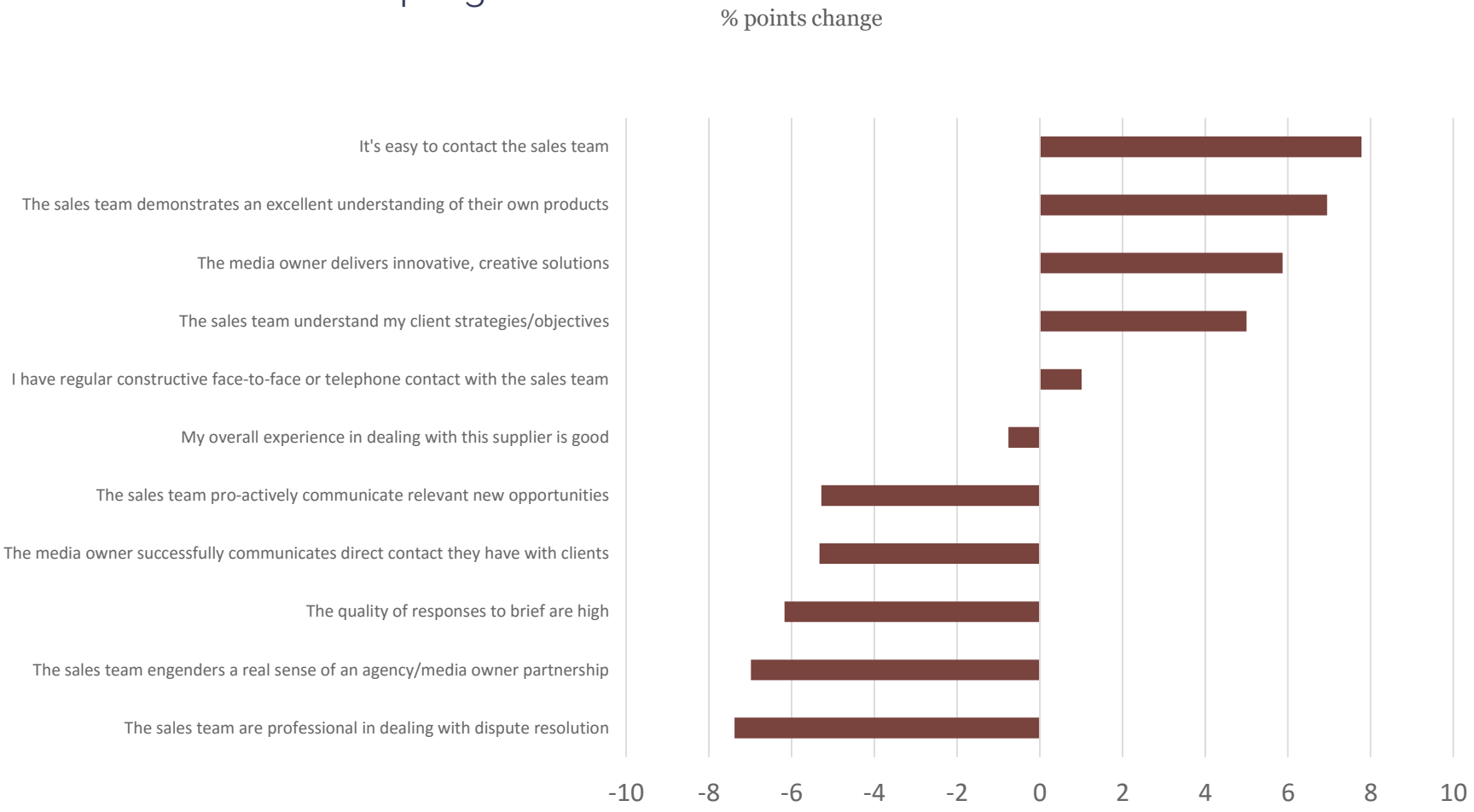


Facebook*
Autumn 2018



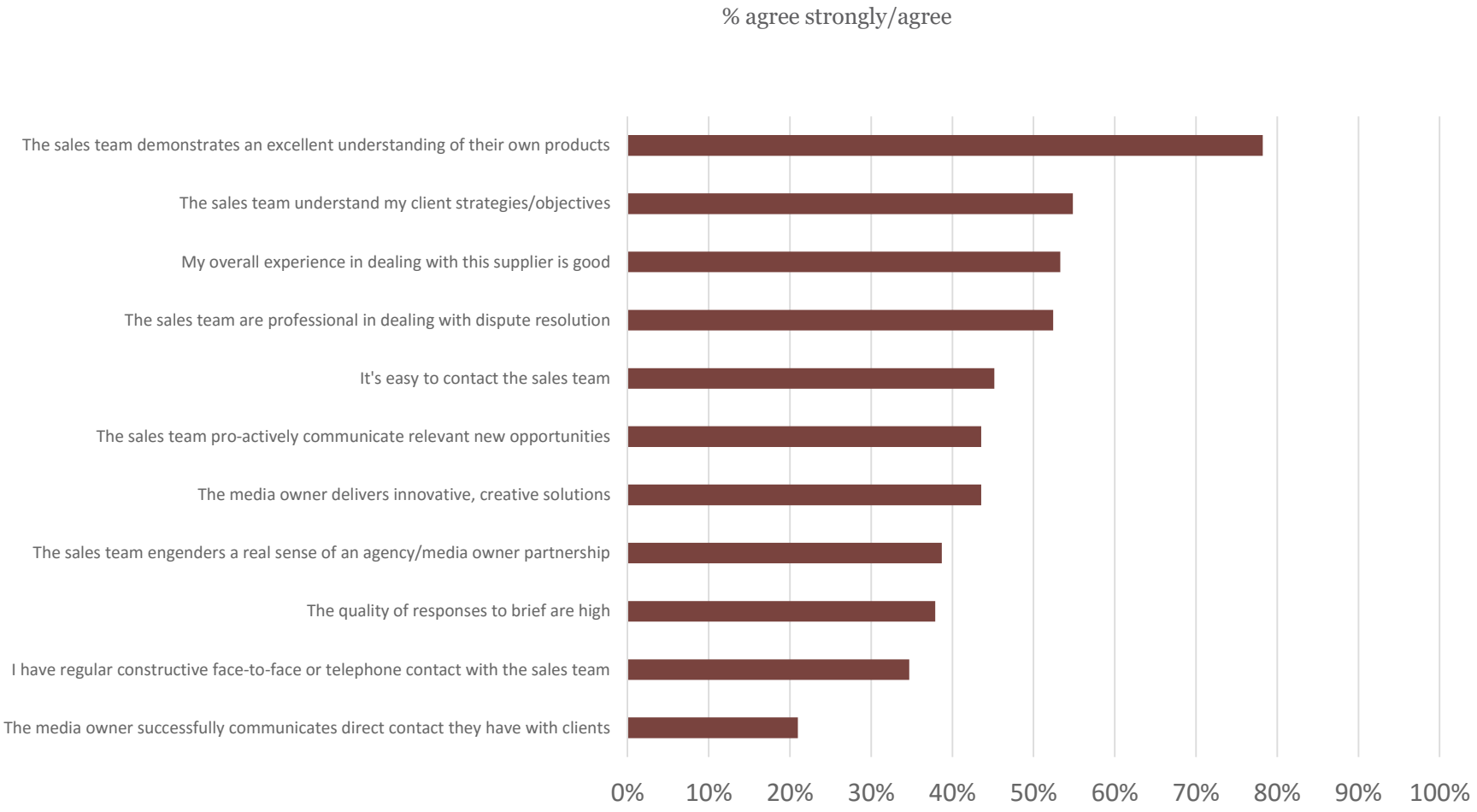
*DTSG Signatory

Facebook*
Autumn 2018 vs Spring 2018



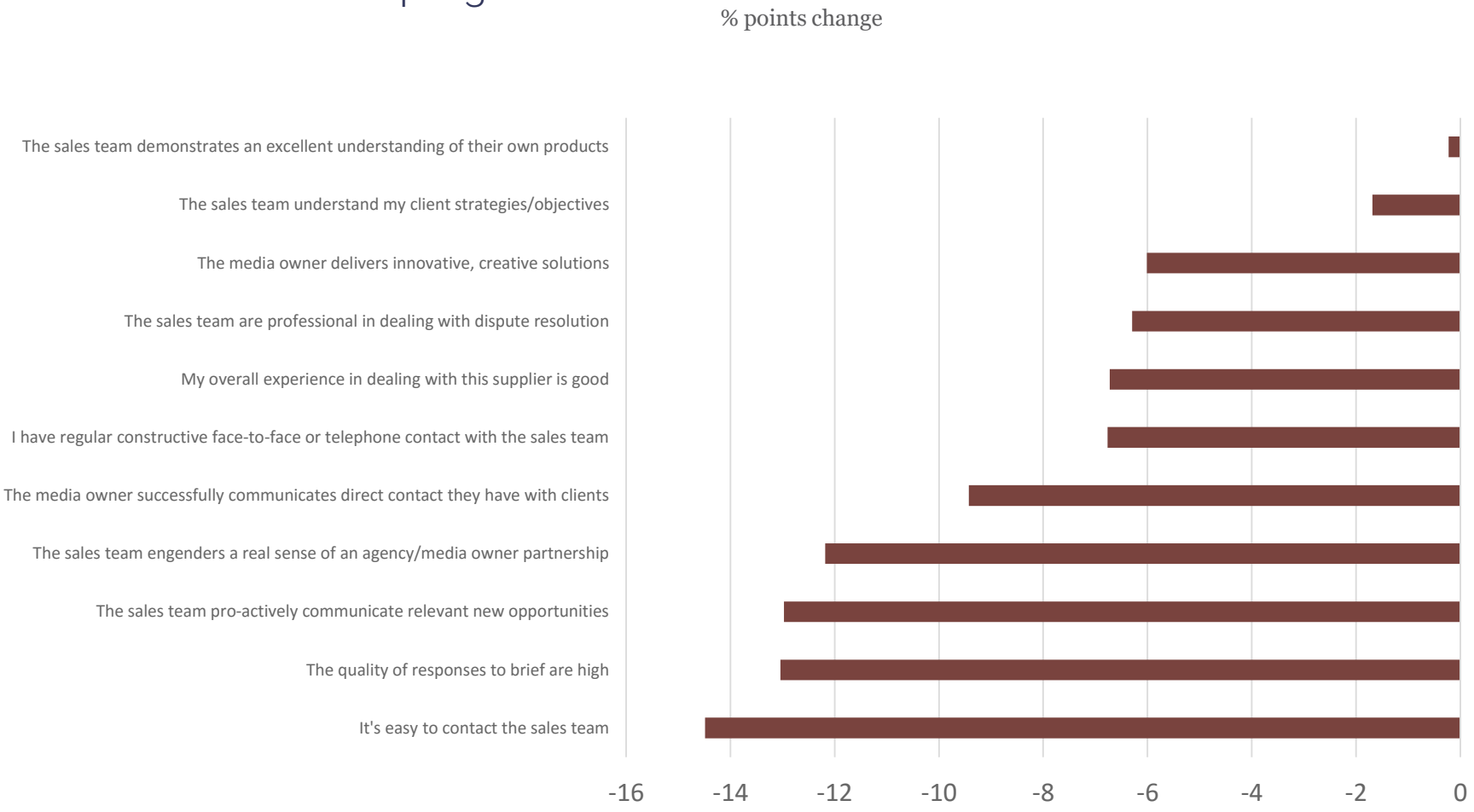
*DTSG Signatory

Google (Display)/YouTube**
Autumn 2018



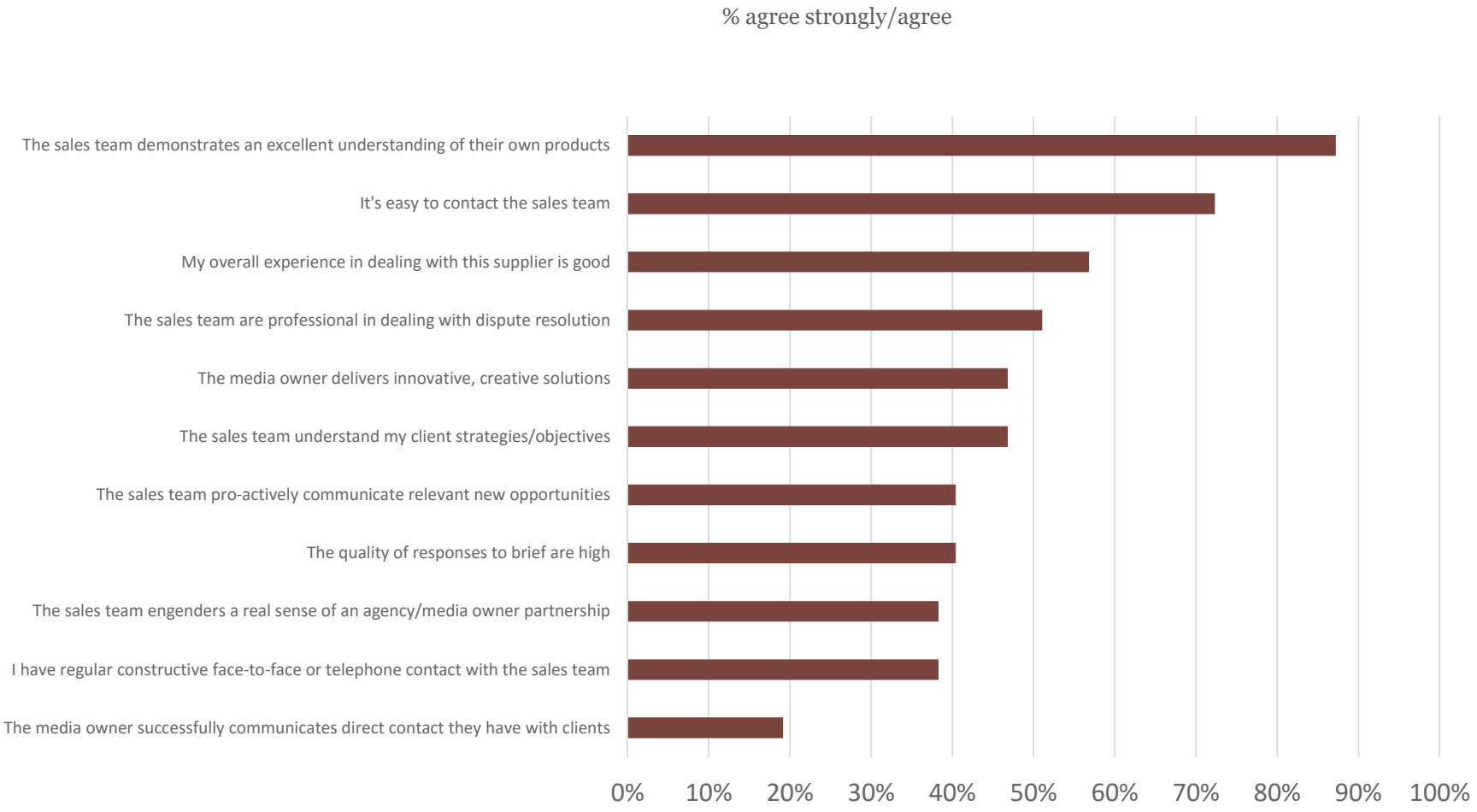
**DTSG Certified

Google (Display)/YouTube**
Autumn 2018 vs Spring 2018



**DTSG Certified

Inskin Media**
Autumn 2018



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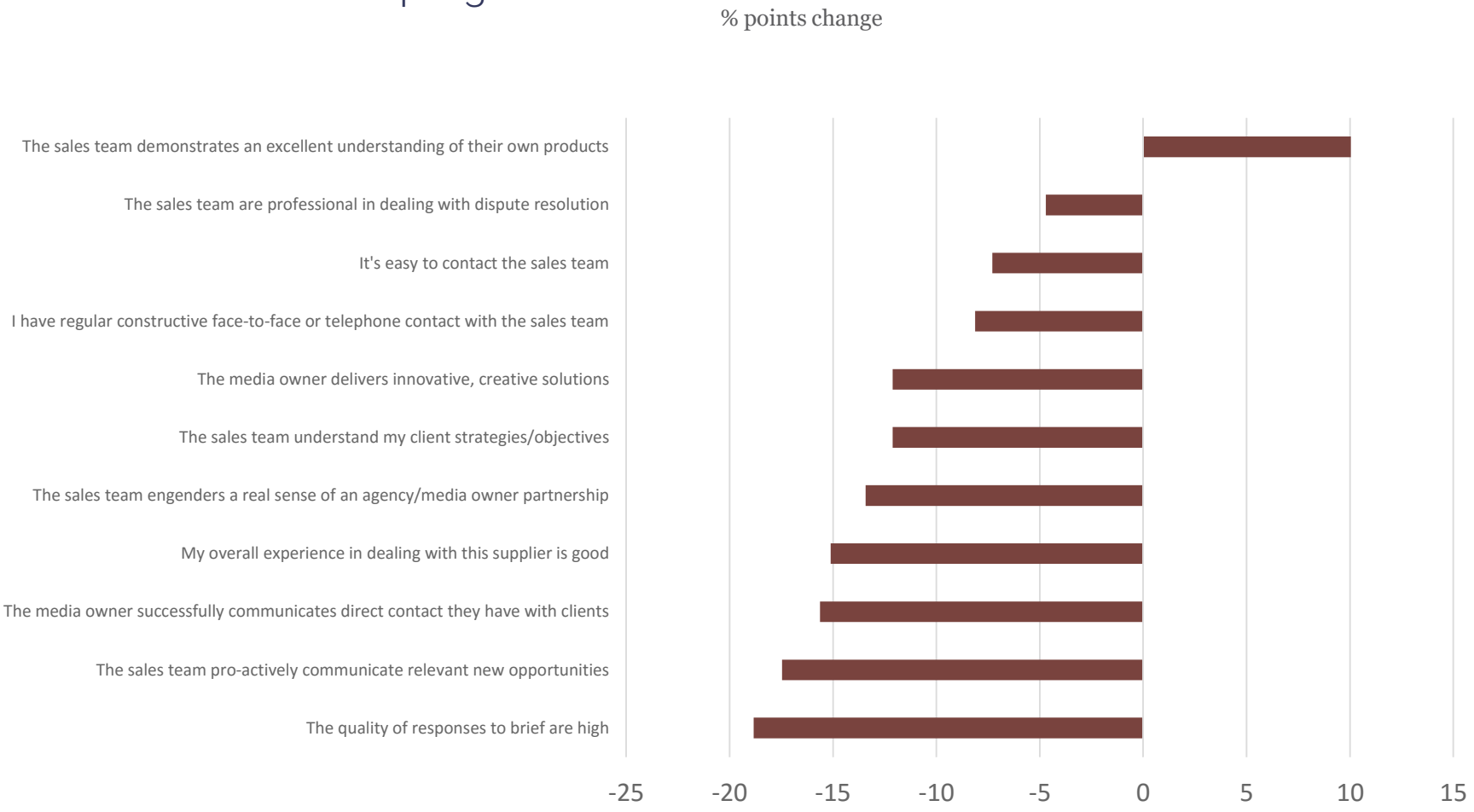
Inskin Media**
Autumn 2018 vs Spring 2018



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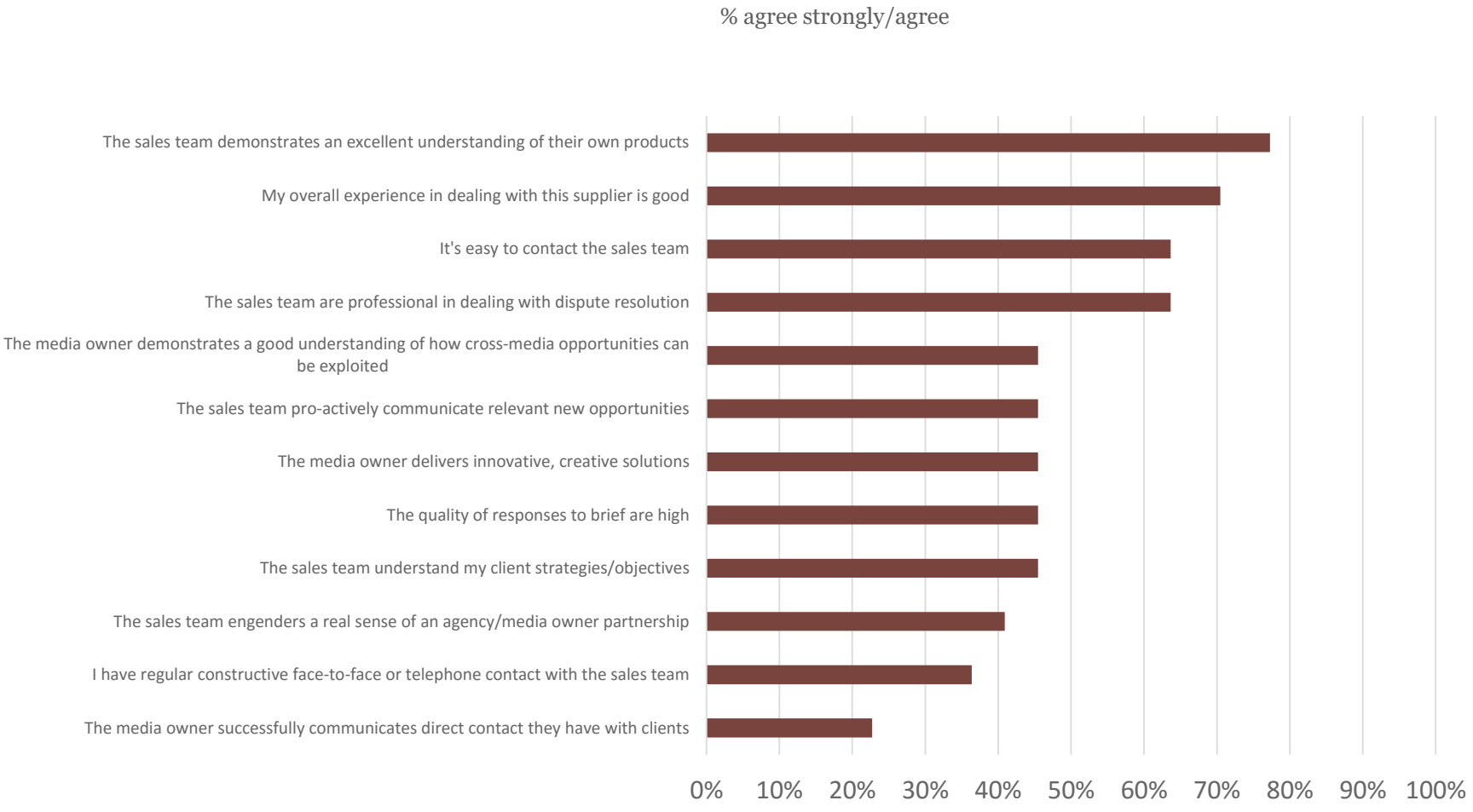
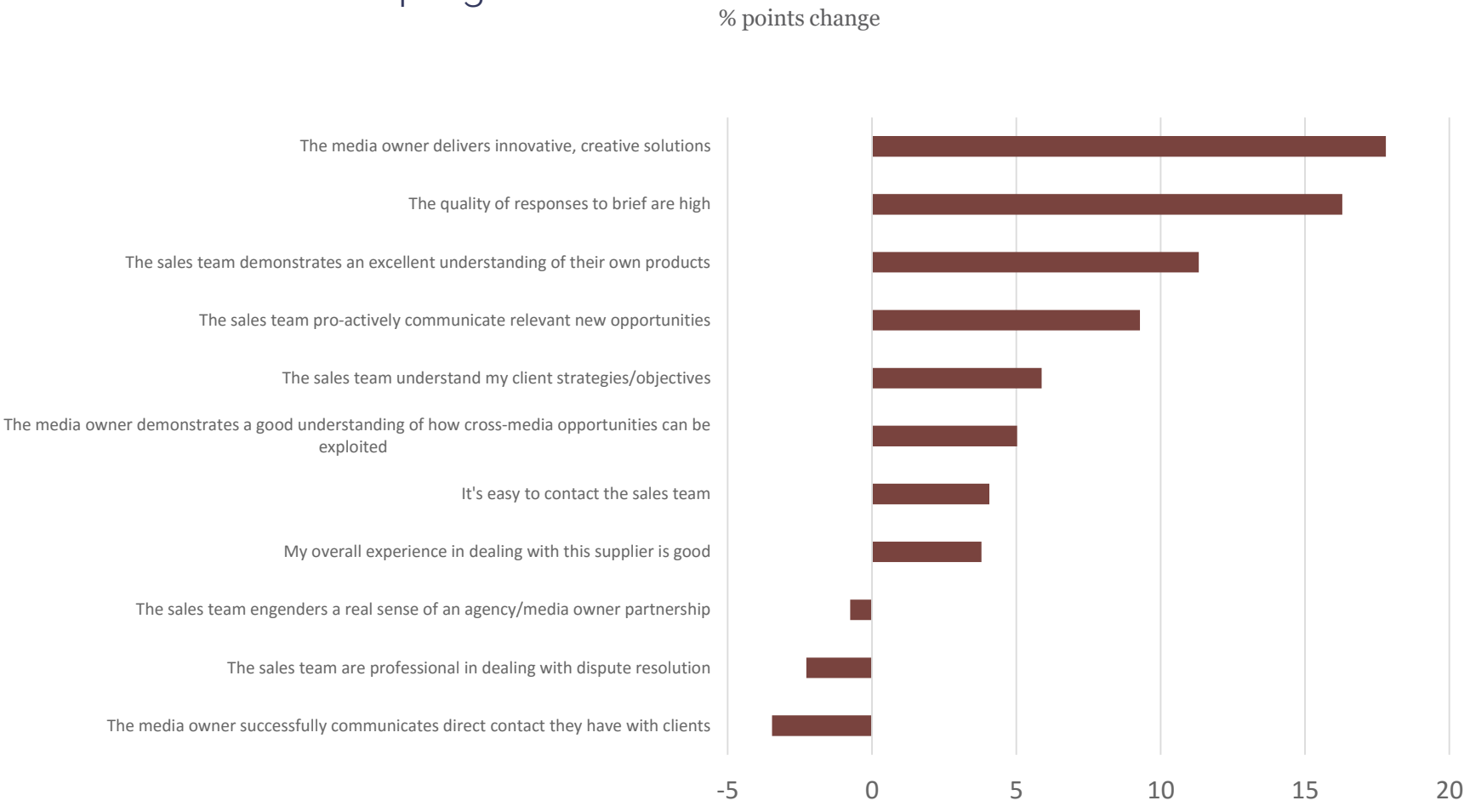
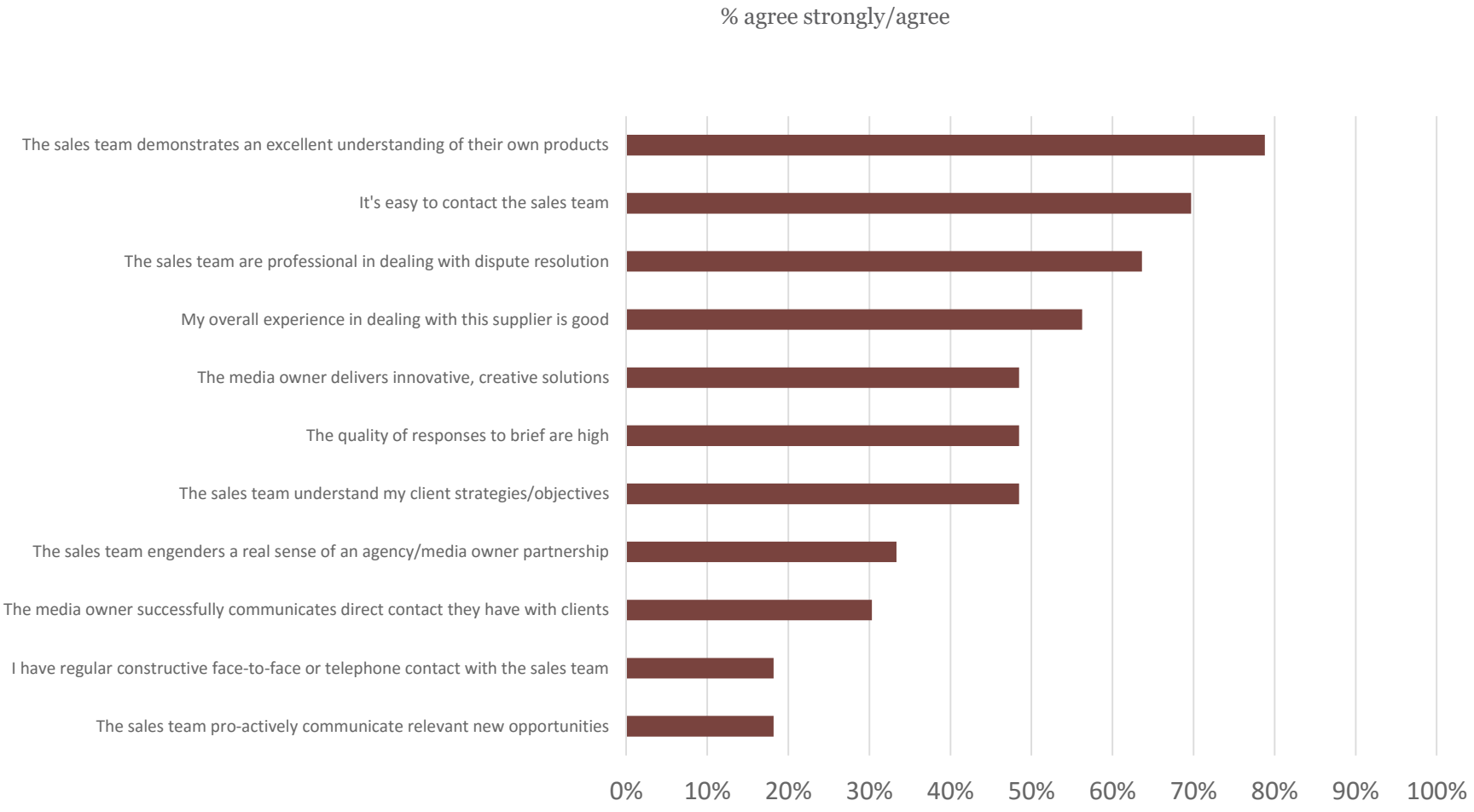
ITV.com
Autumn 2018



ITV.com
Autumn 2018 vs Spring 2018

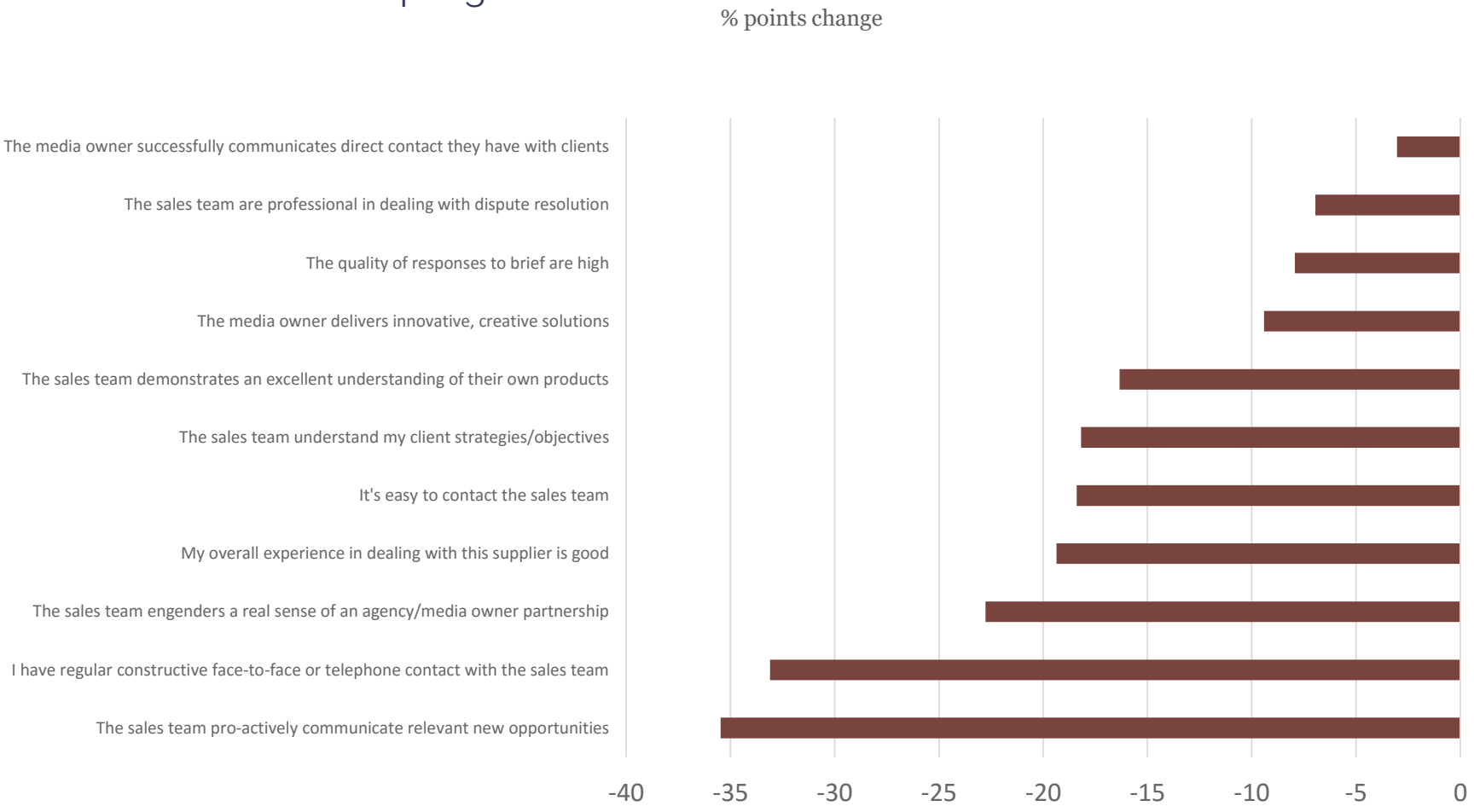


LoopMe**
Autumn 2018



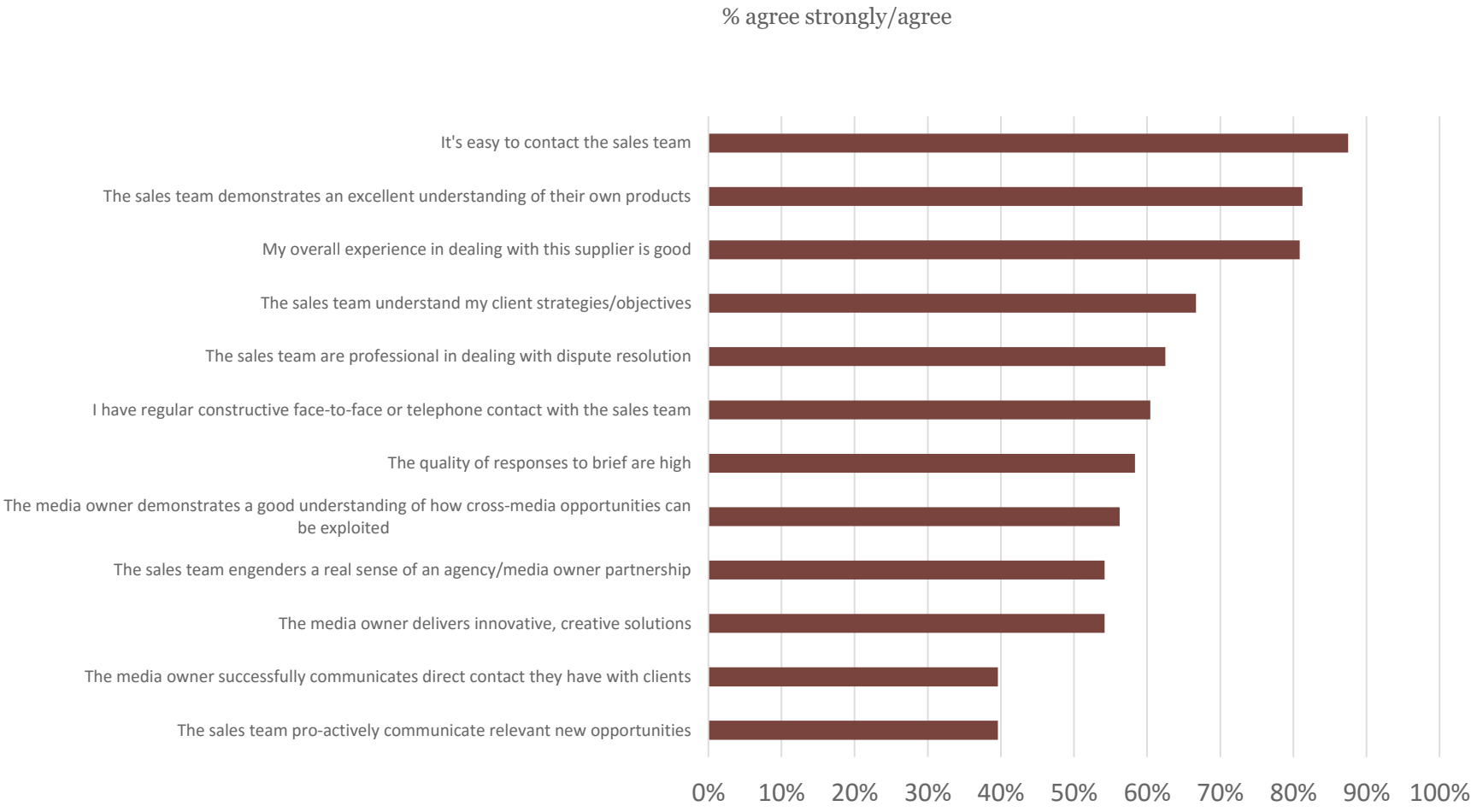
**DTSG Certified

LoopMe**
Autumn 2018 vs Spring 2018



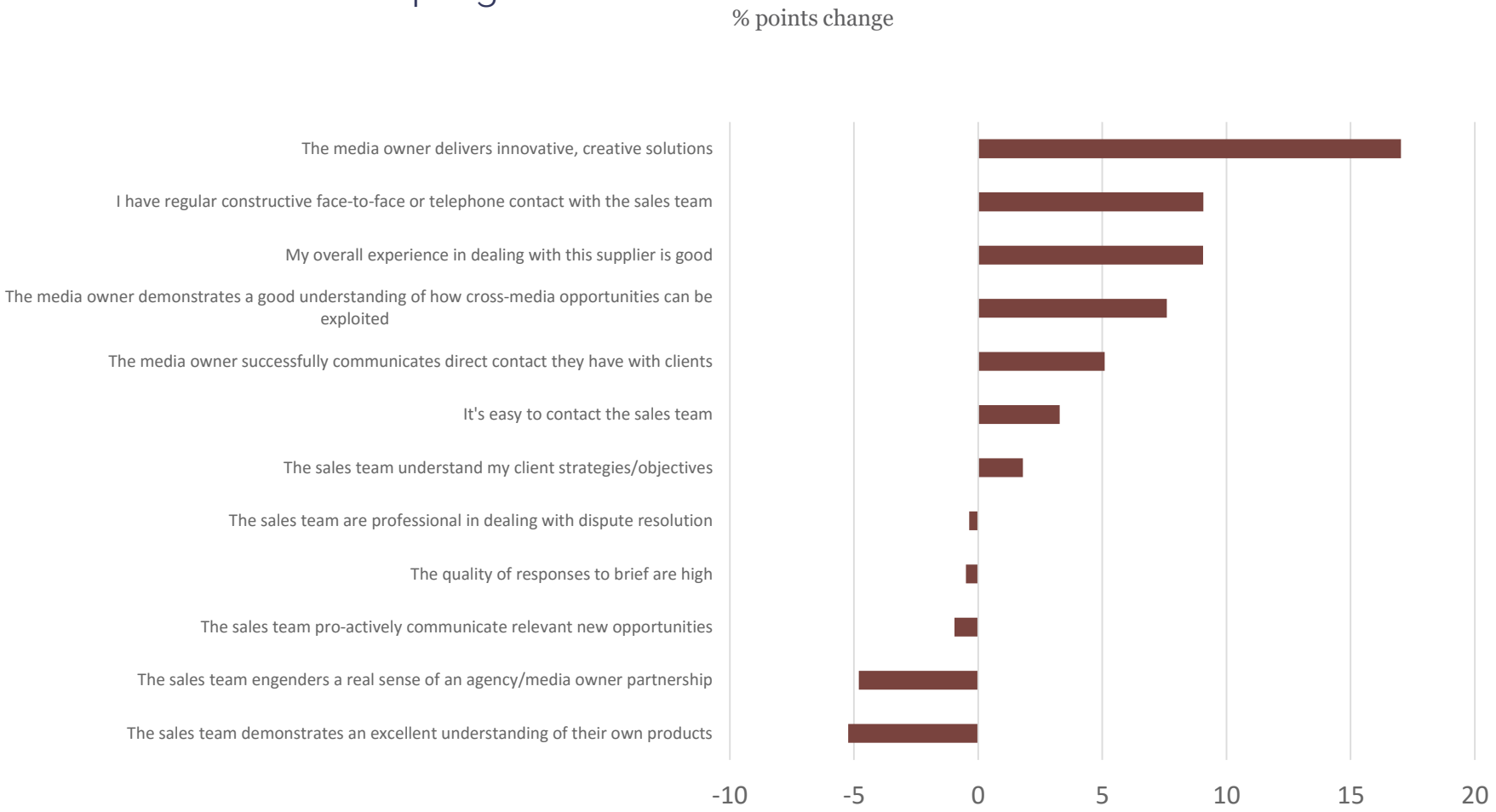
**DTSG Certified

Mail Online/Associated*
Autumn 2018



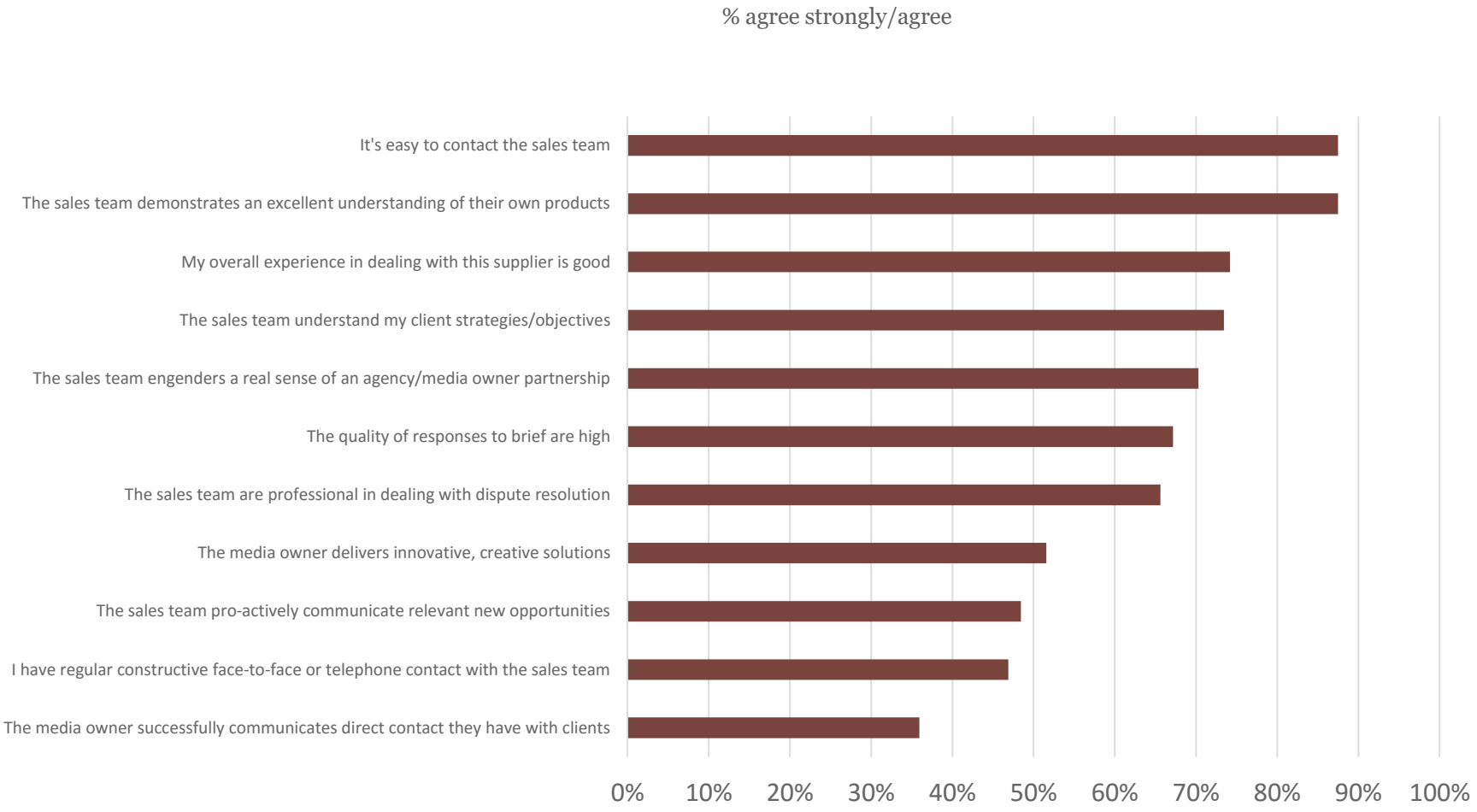
*DTSG Signatory

Mail Online/Associated*
Autumn 2018 vs Spring 2018



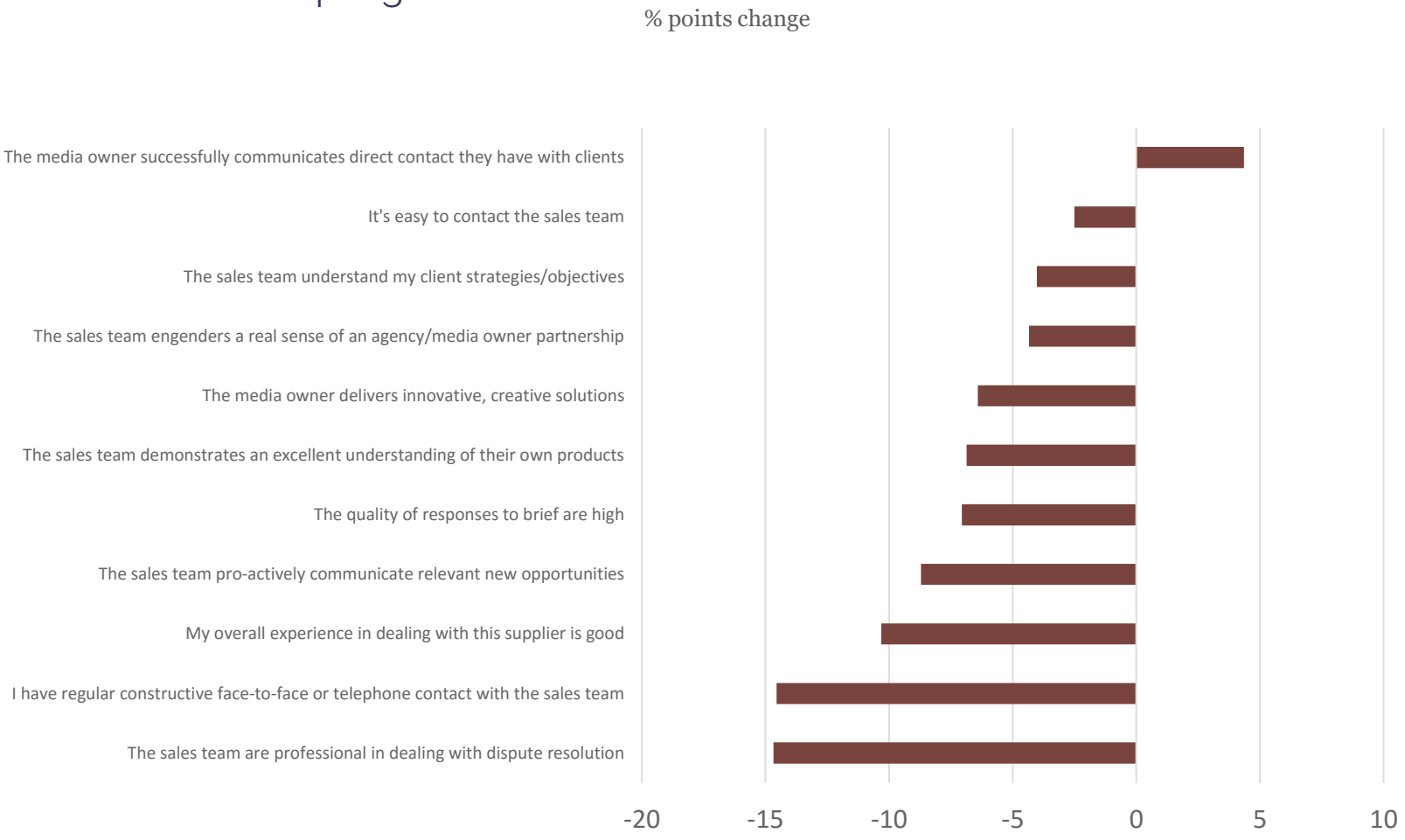
*DTSG Signatory

Media iQ
Autumn 2018



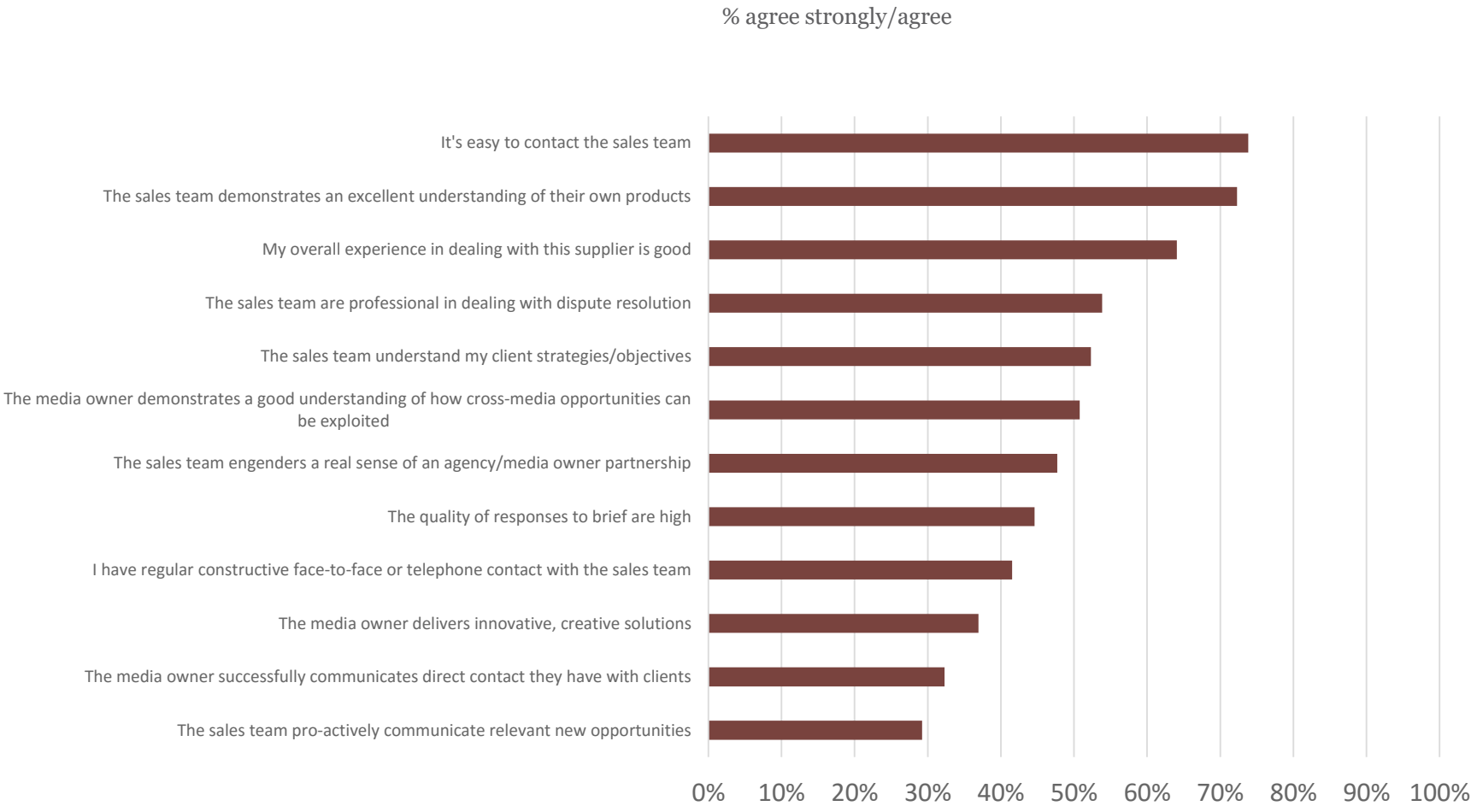
**DTSG Certified

Media iQ**
Autumn 2018 vs Spring 2018



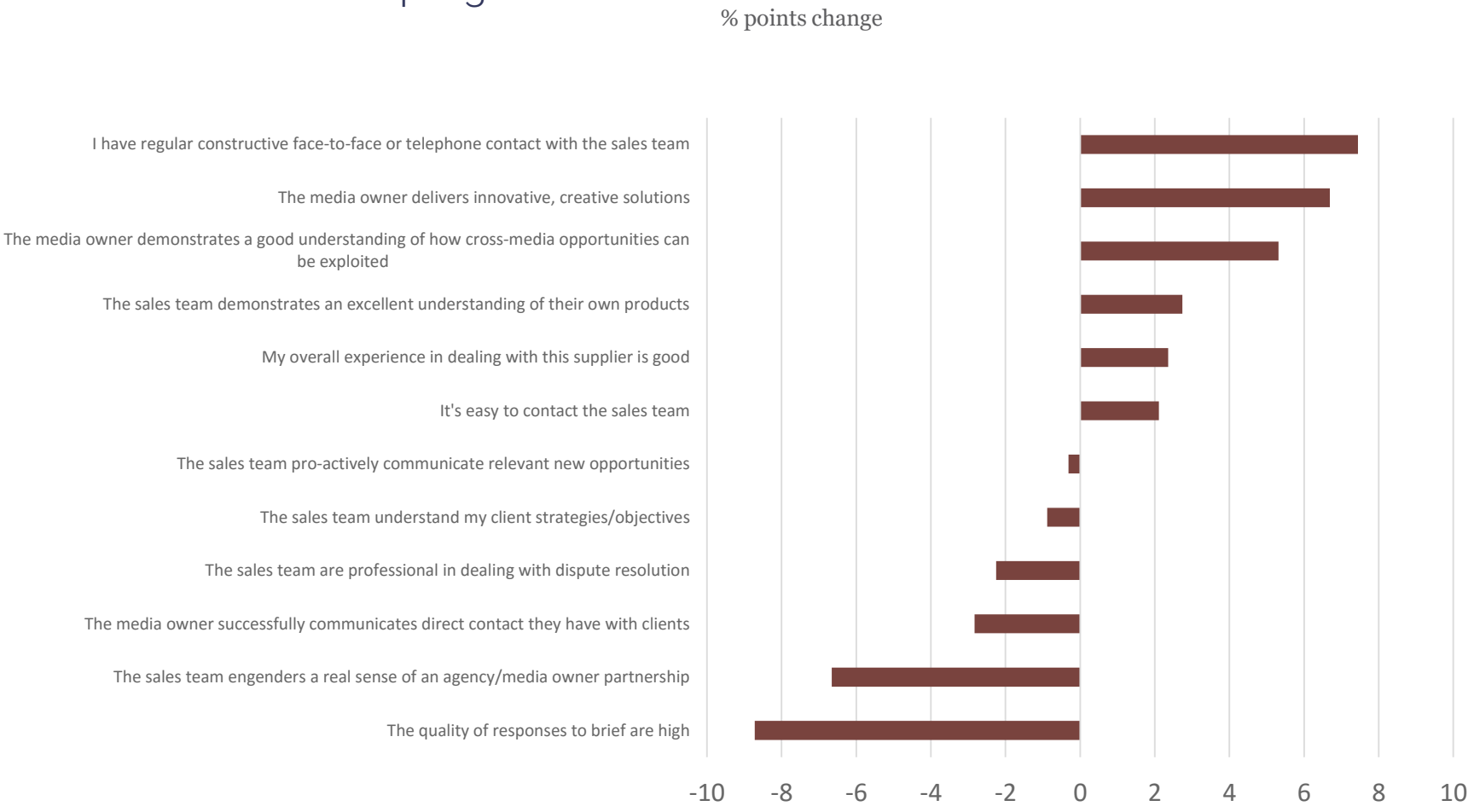
**DTSG Certified

News UK**
Autumn 2018



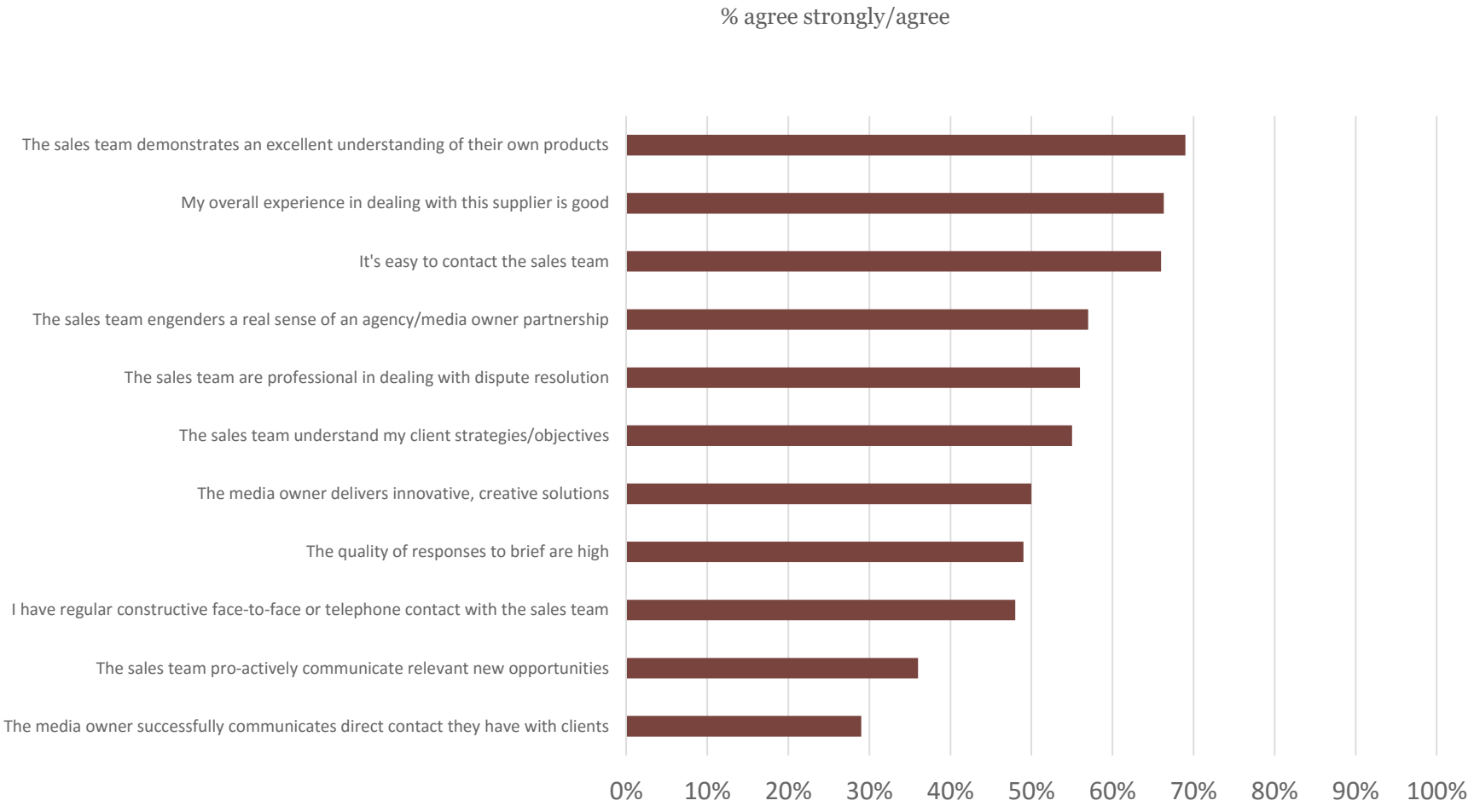
**DTSG Certified

News UK**
Autumn 2018 vs Spring 2018



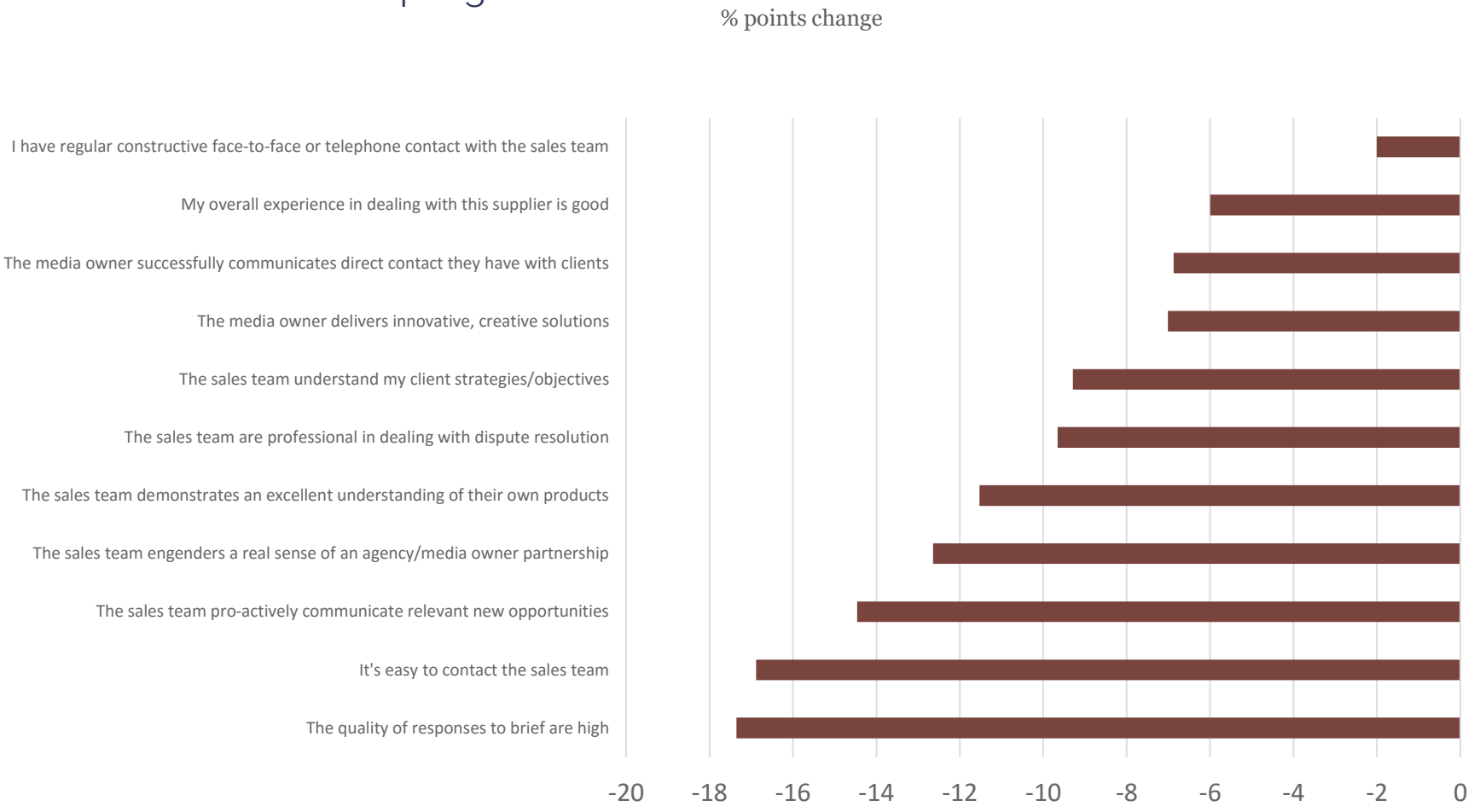
**DTSG Certified

Oath**
Autumn 2018



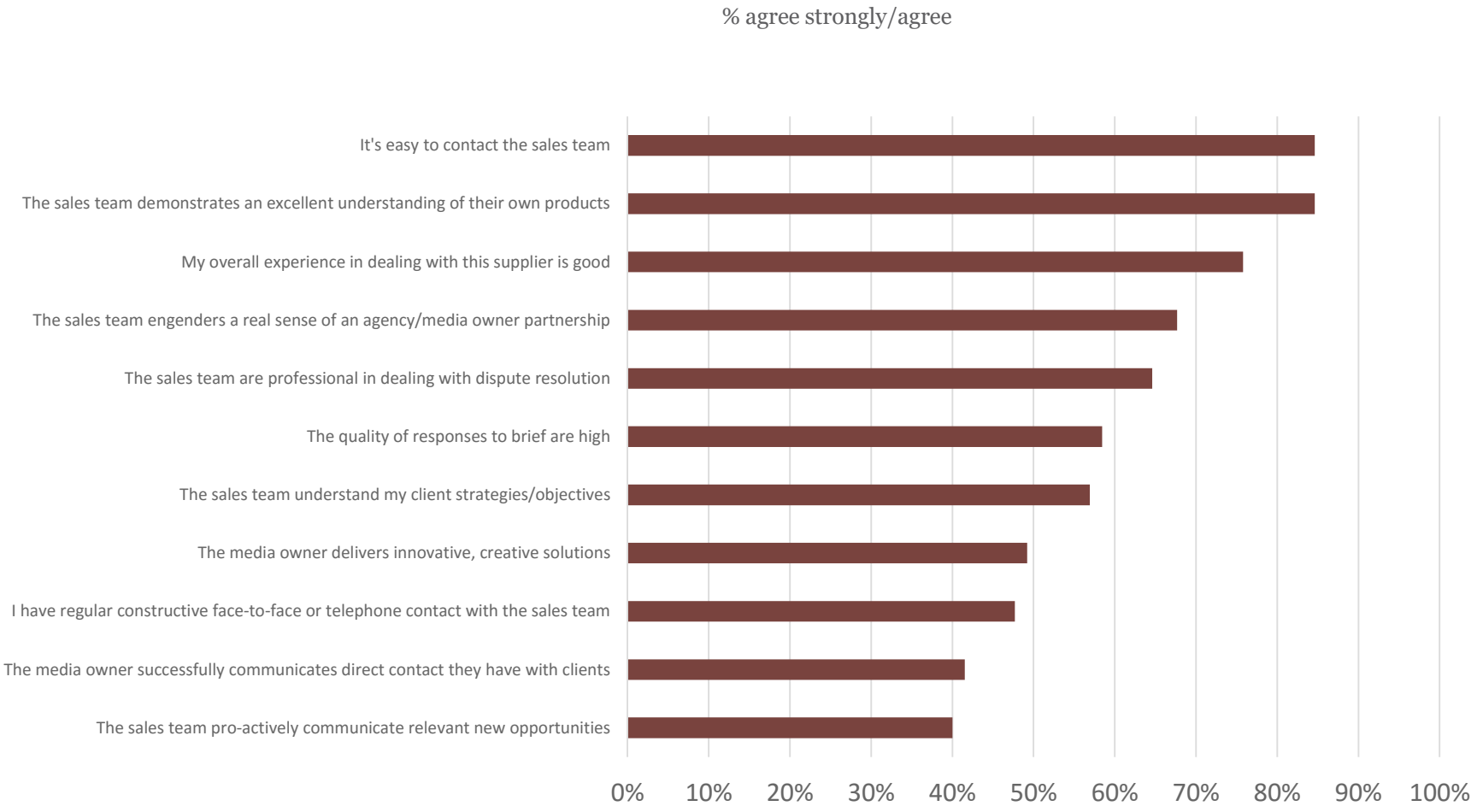
**DTSG Certified

Oath**
Autumn 2018 vs Spring 2018



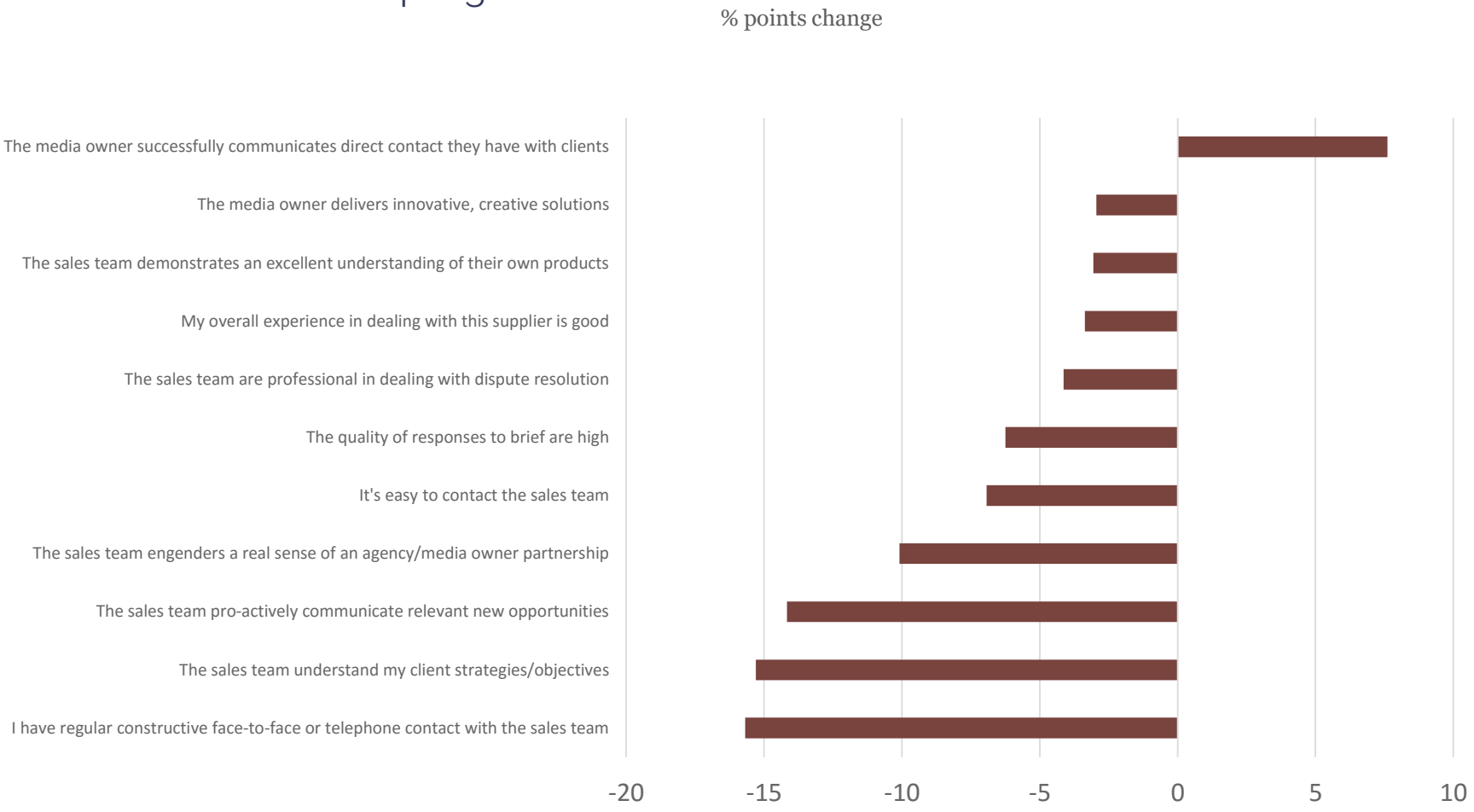
**DTSG Certified

Quantcast**
Autumn 2018



**DTSG Certified

Quantcast**
Autumn 2018 vs Spring 2018



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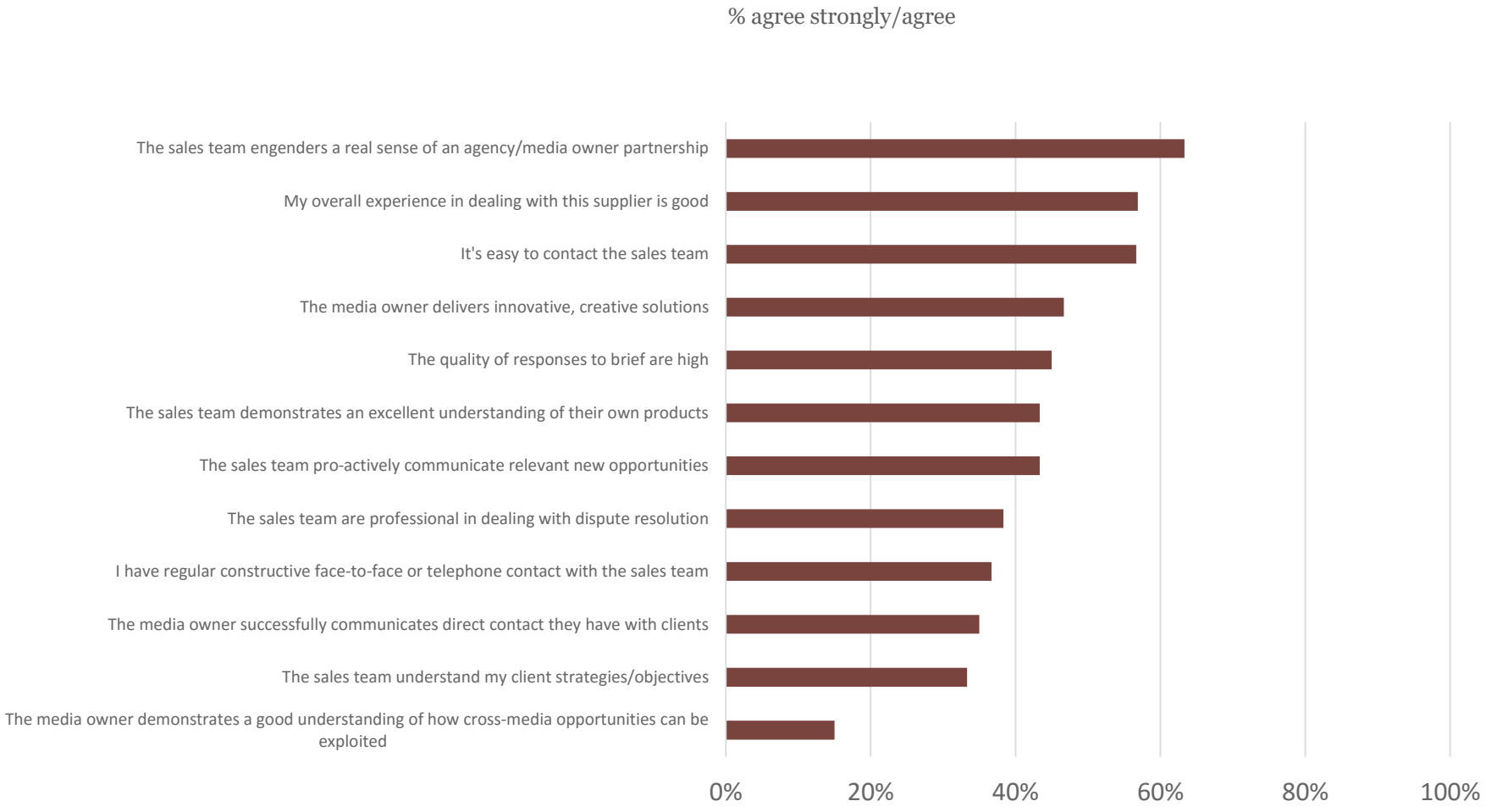
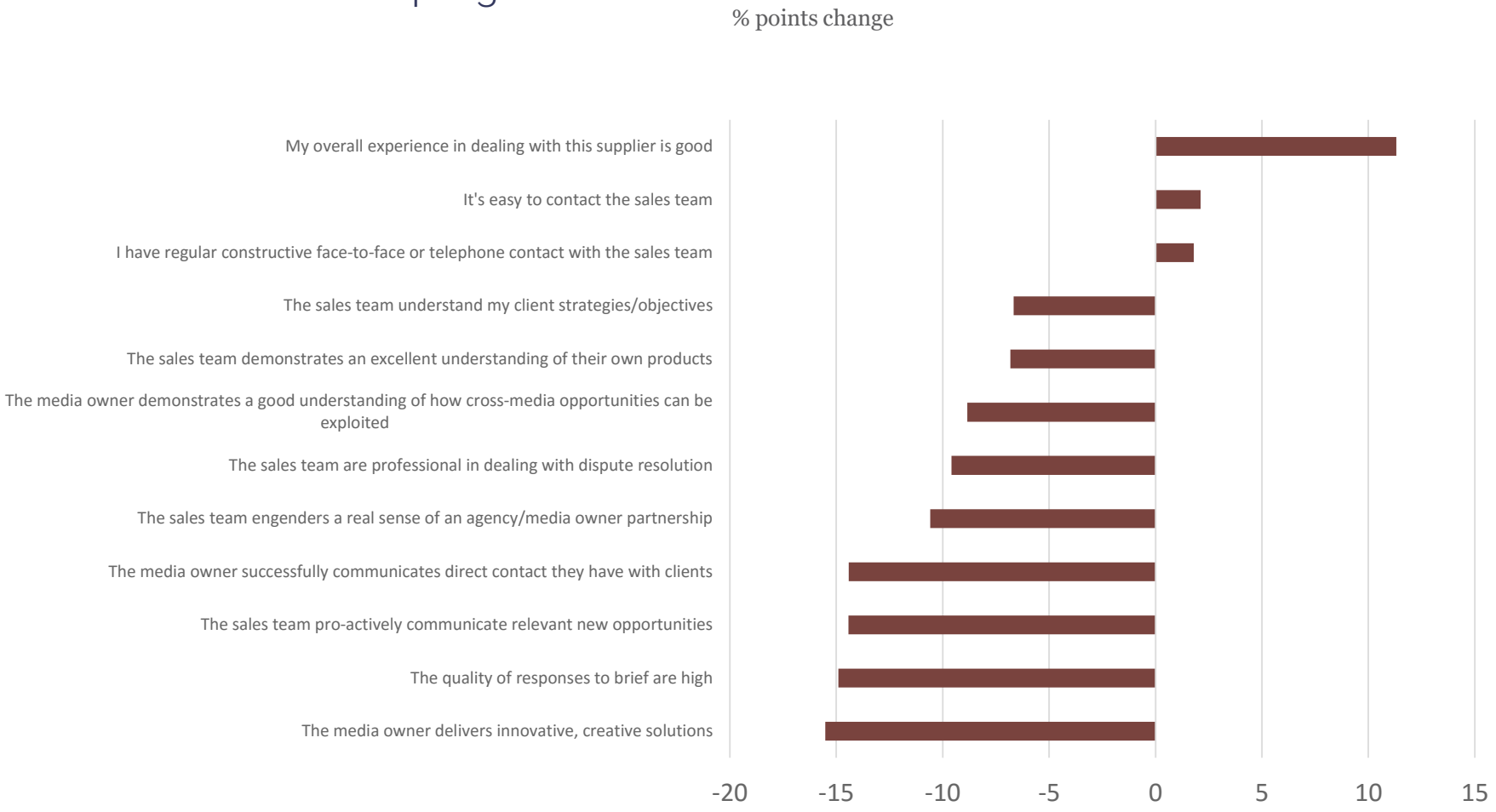
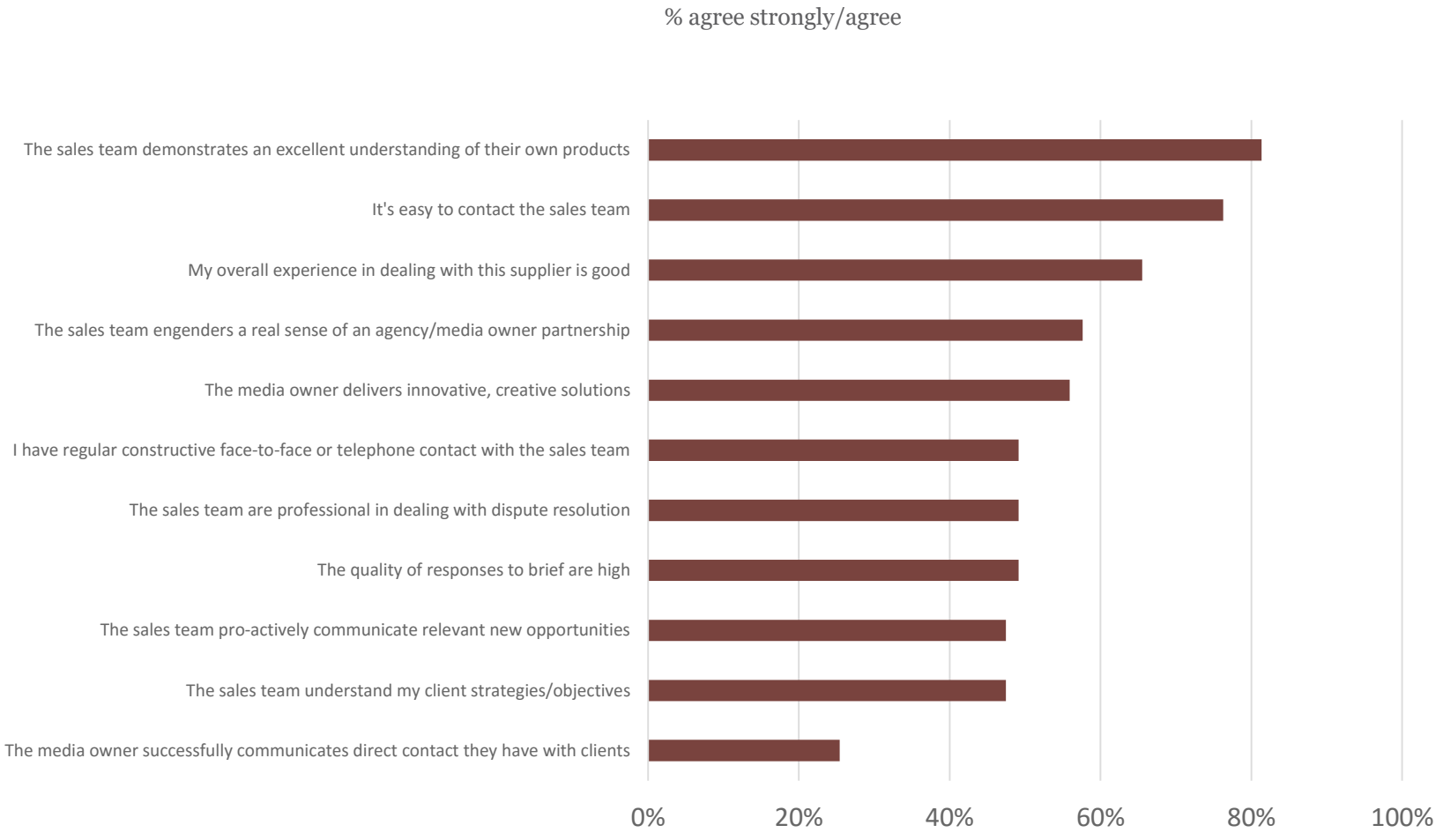
Sky Digital Media
Autumn 2018



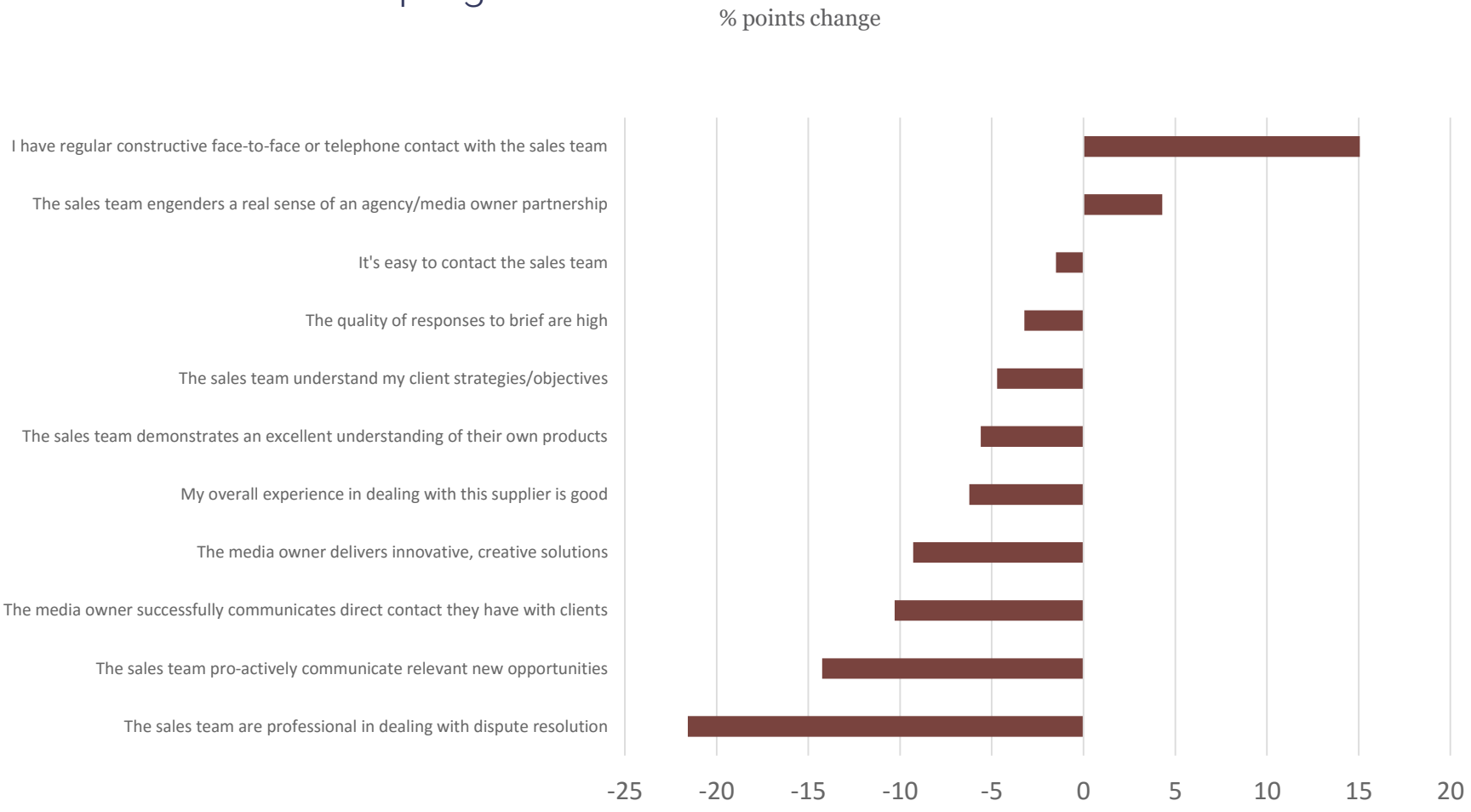
Sky Digital Media
Autumn 2018 vs Spring 2018



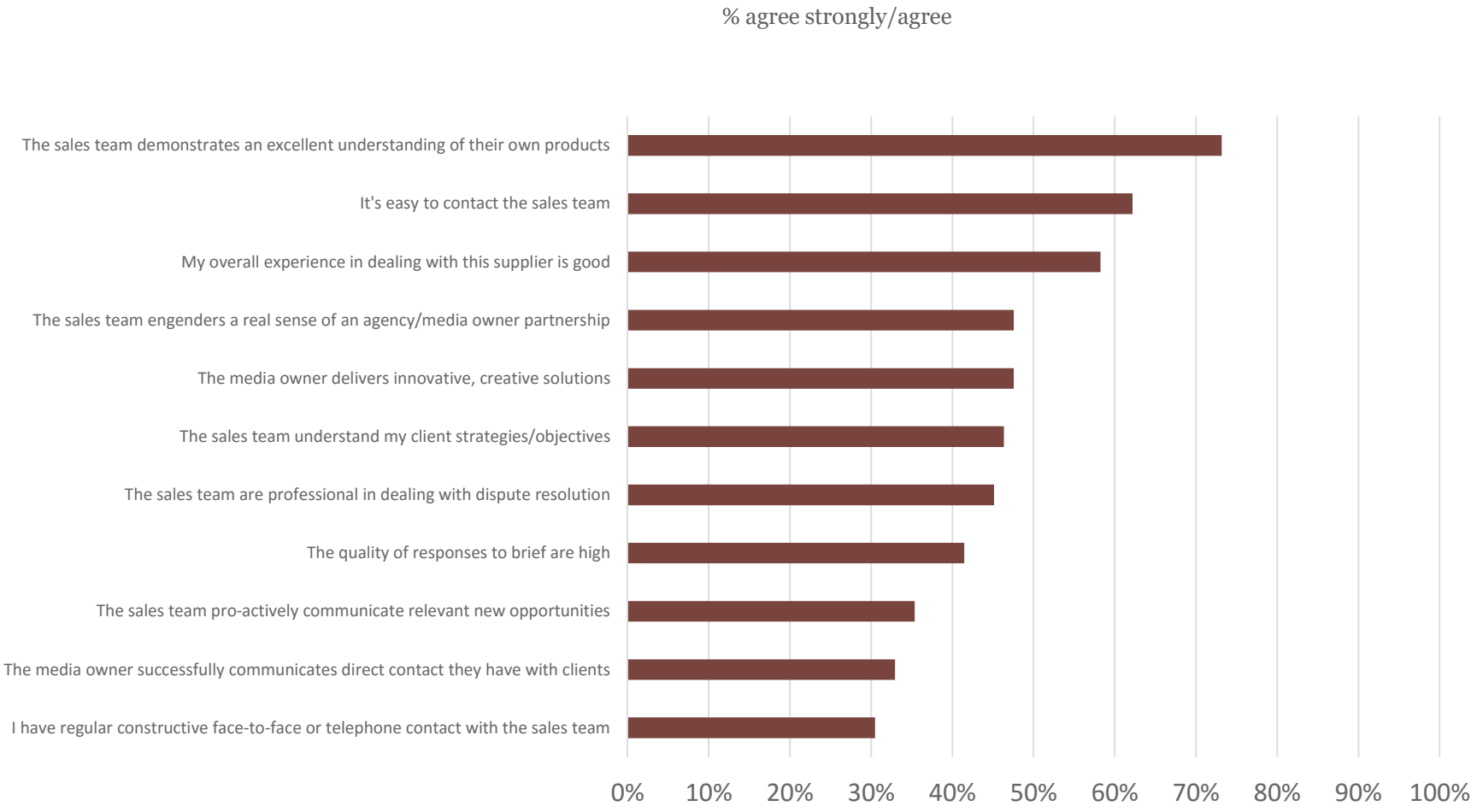
Snapchat
Autumn 2018



Snapchat
Autumn 2018 vs Spring 2018

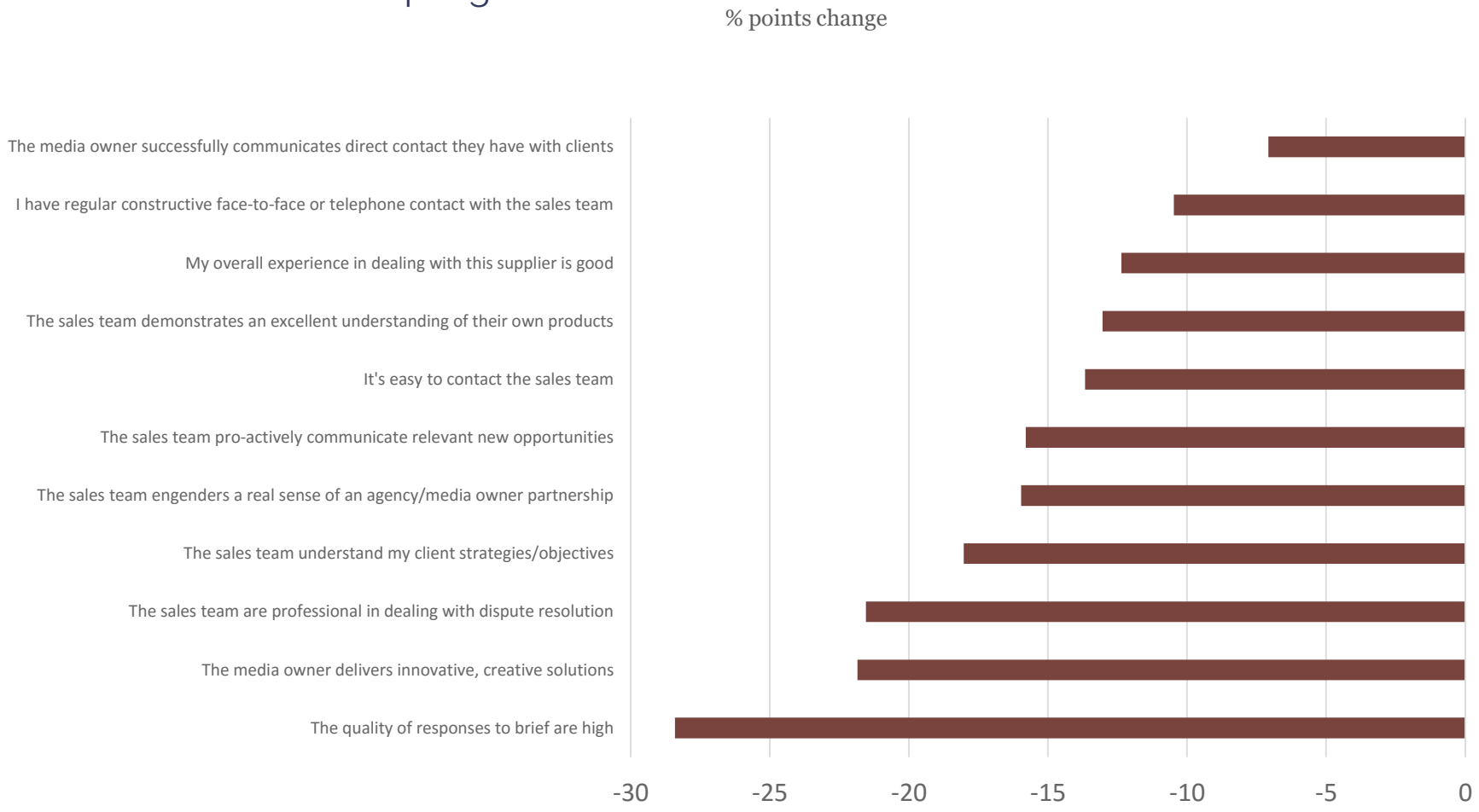


Spotify*
Autumn 2018



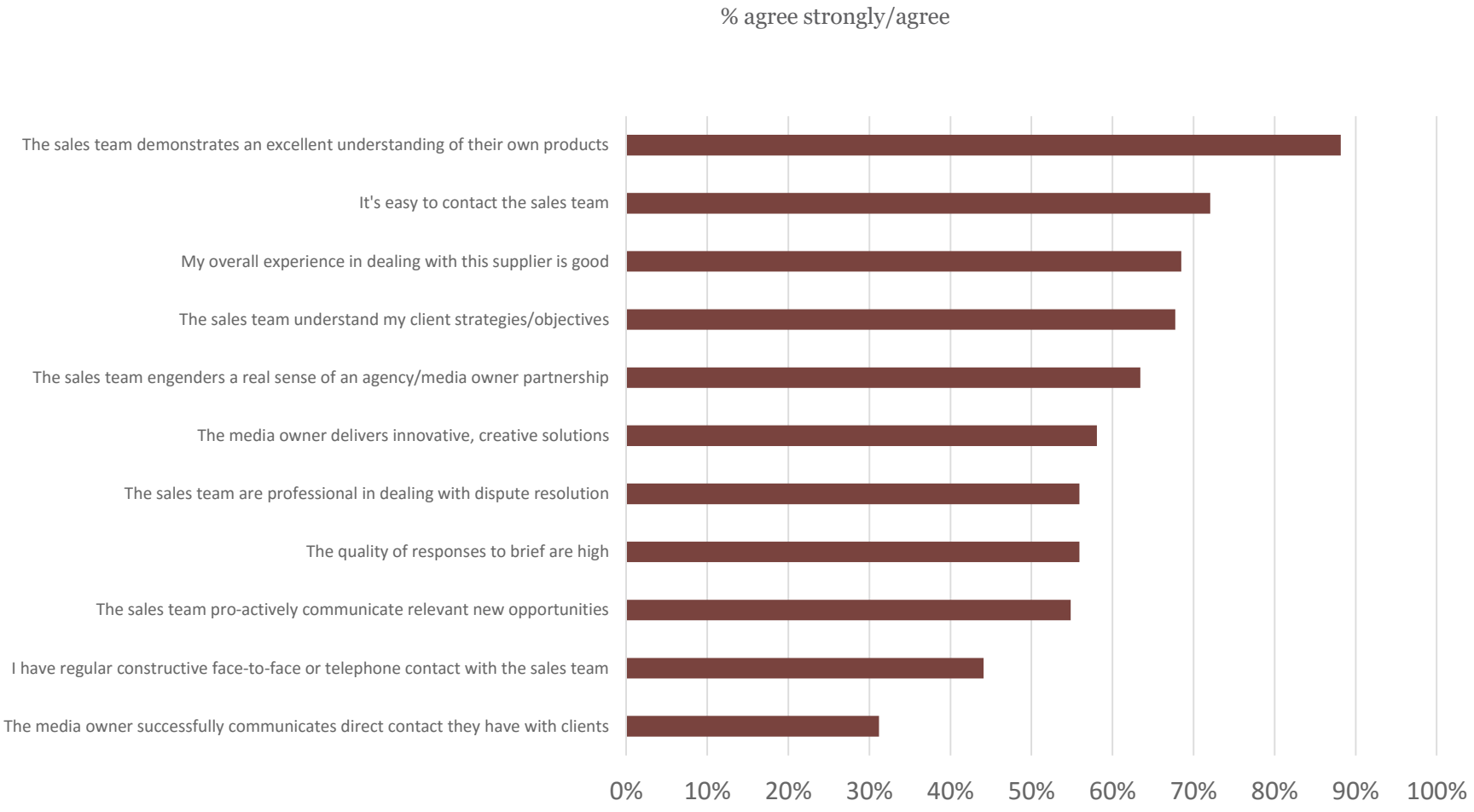
*DTSG Signatory

Spotify*
Autumn 2018 vs Spring 2018



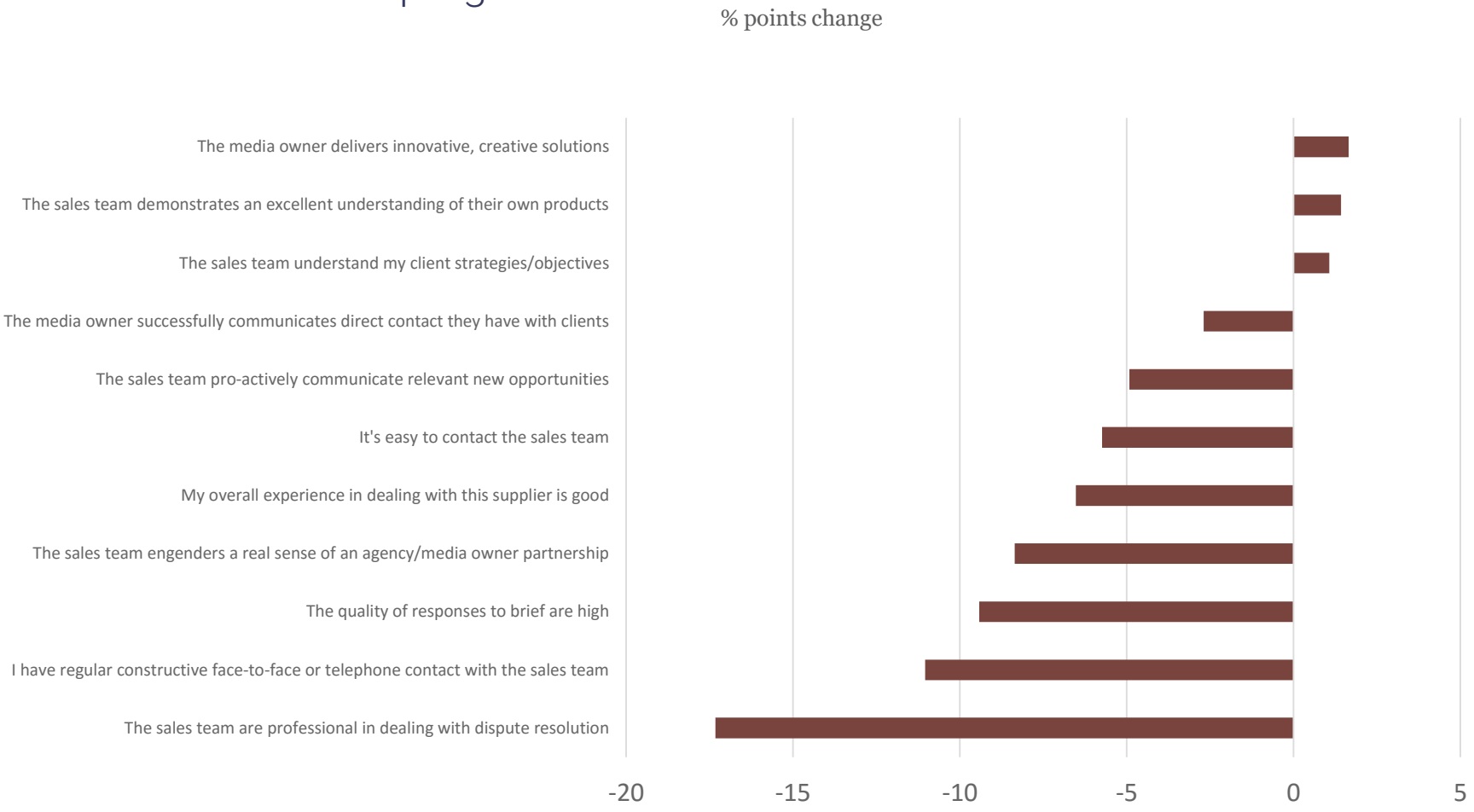
*DTSG Signatory

Teads**
Autumn 2018



**DTSG Certified

Teads**
Autumn 2018 vs Spring 2018



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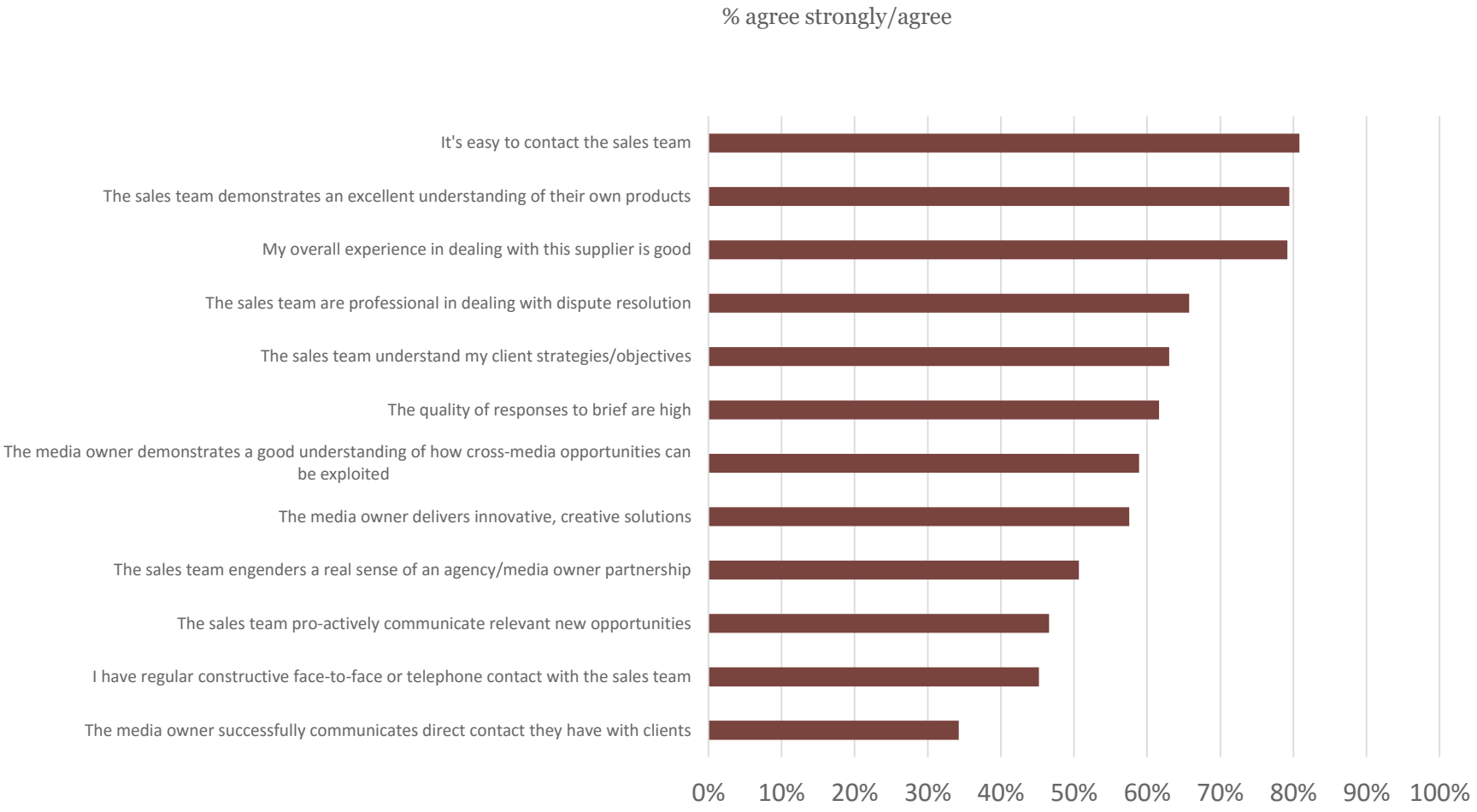
Telegraph.co.uk**
Autumn 2018



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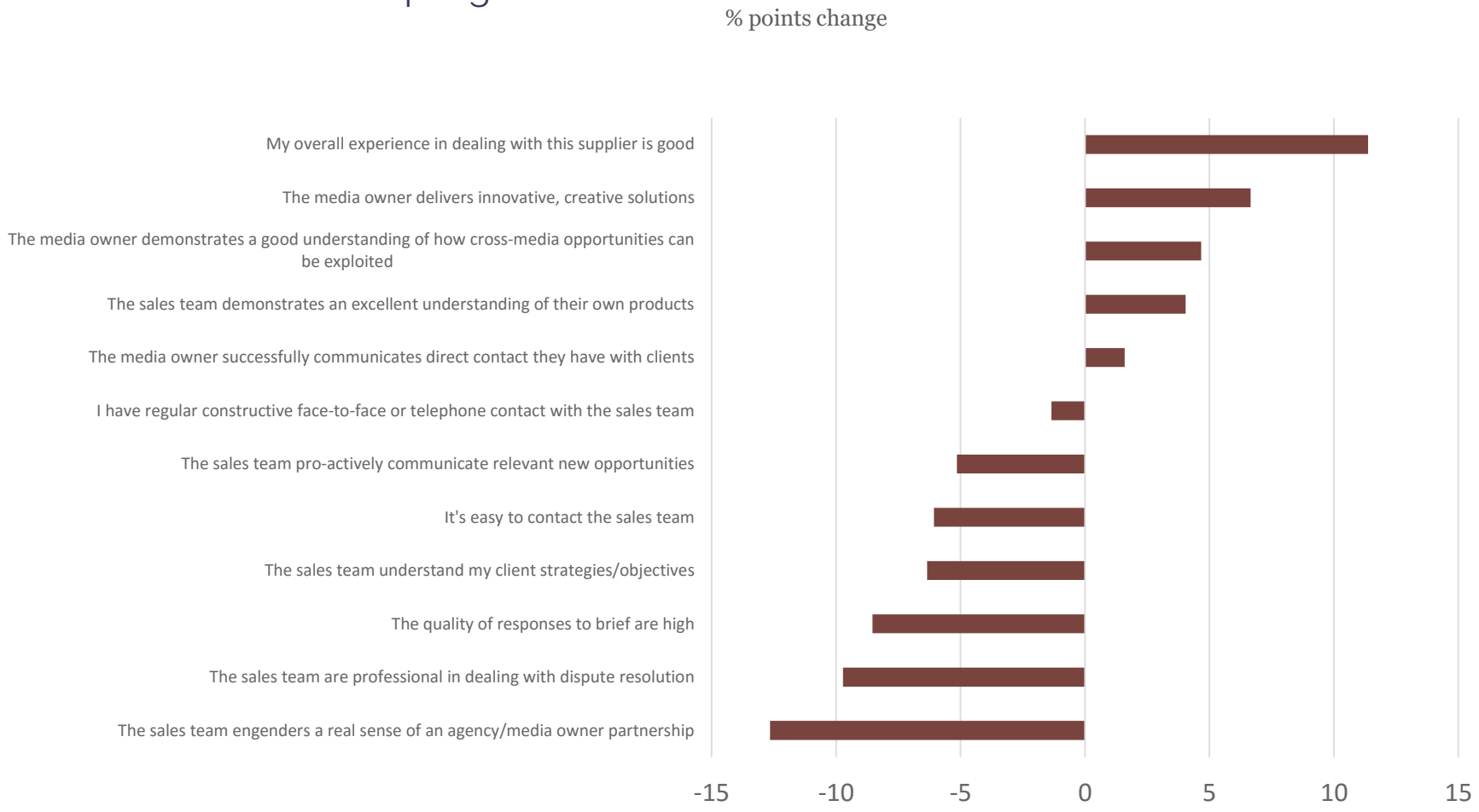
Telegraph.co.uk**
Autumn 2018 vs Spring 2018



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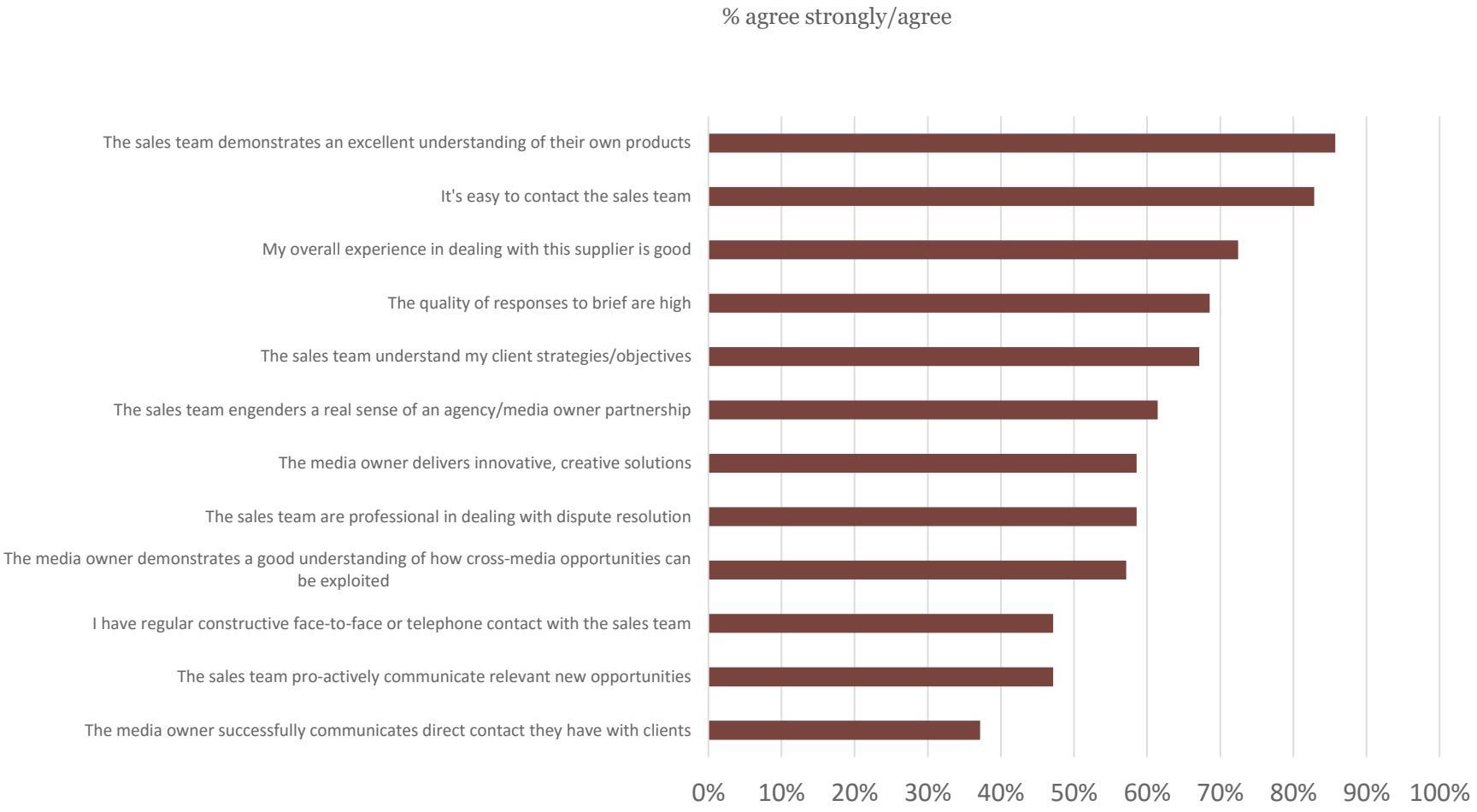
The Guardian**
Autumn 2018



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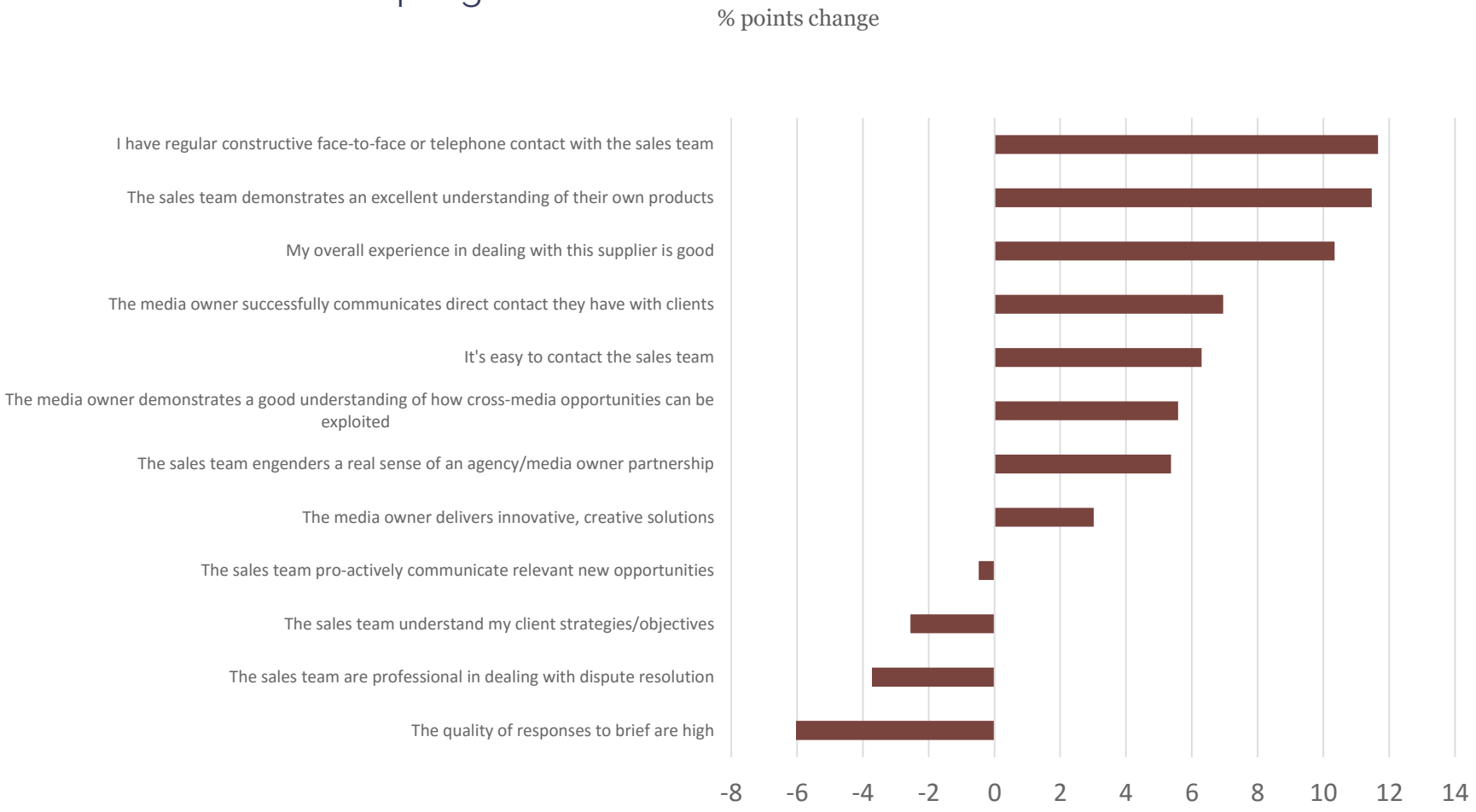
The Guardian**
Autumn 2018 vs Spring 2018



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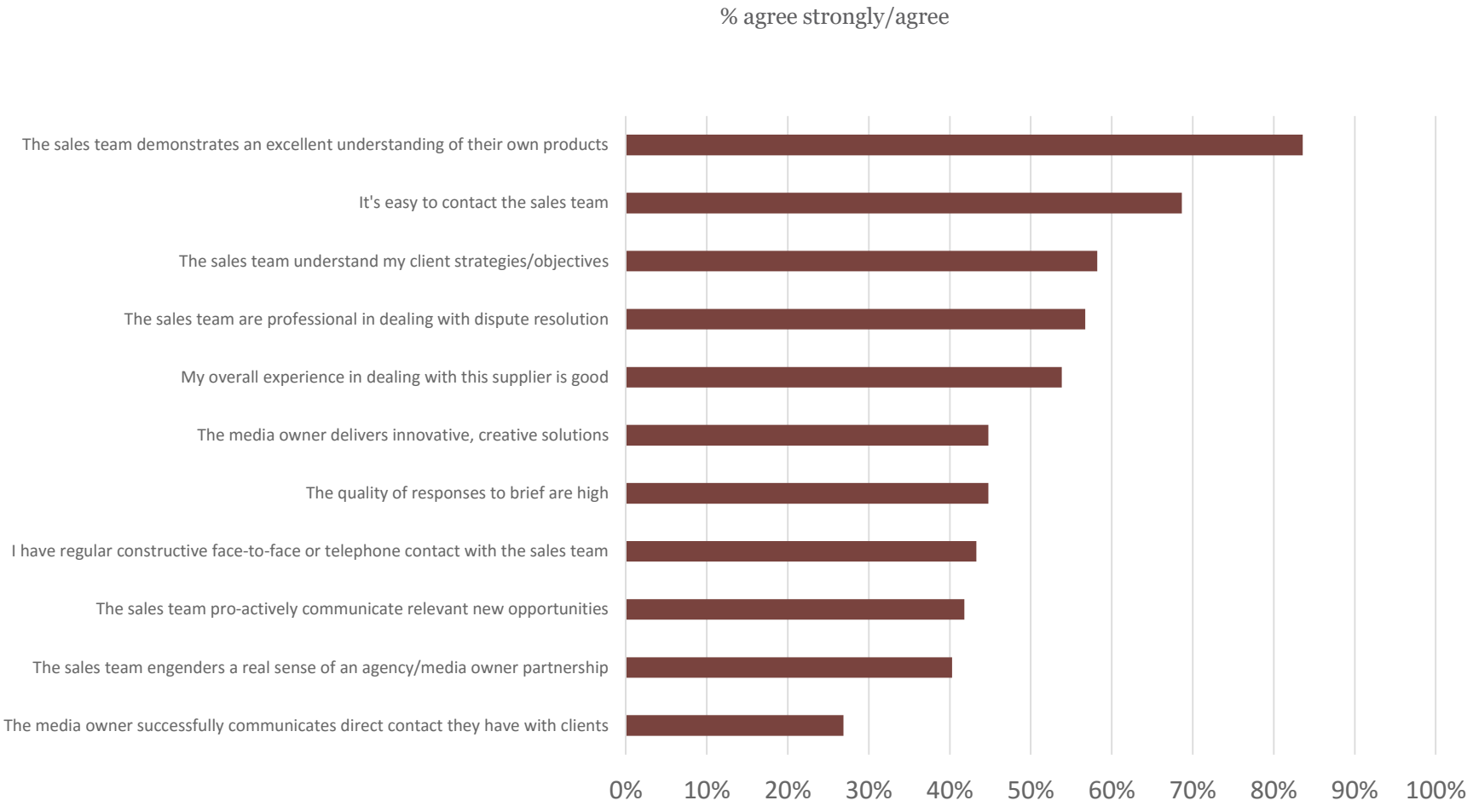
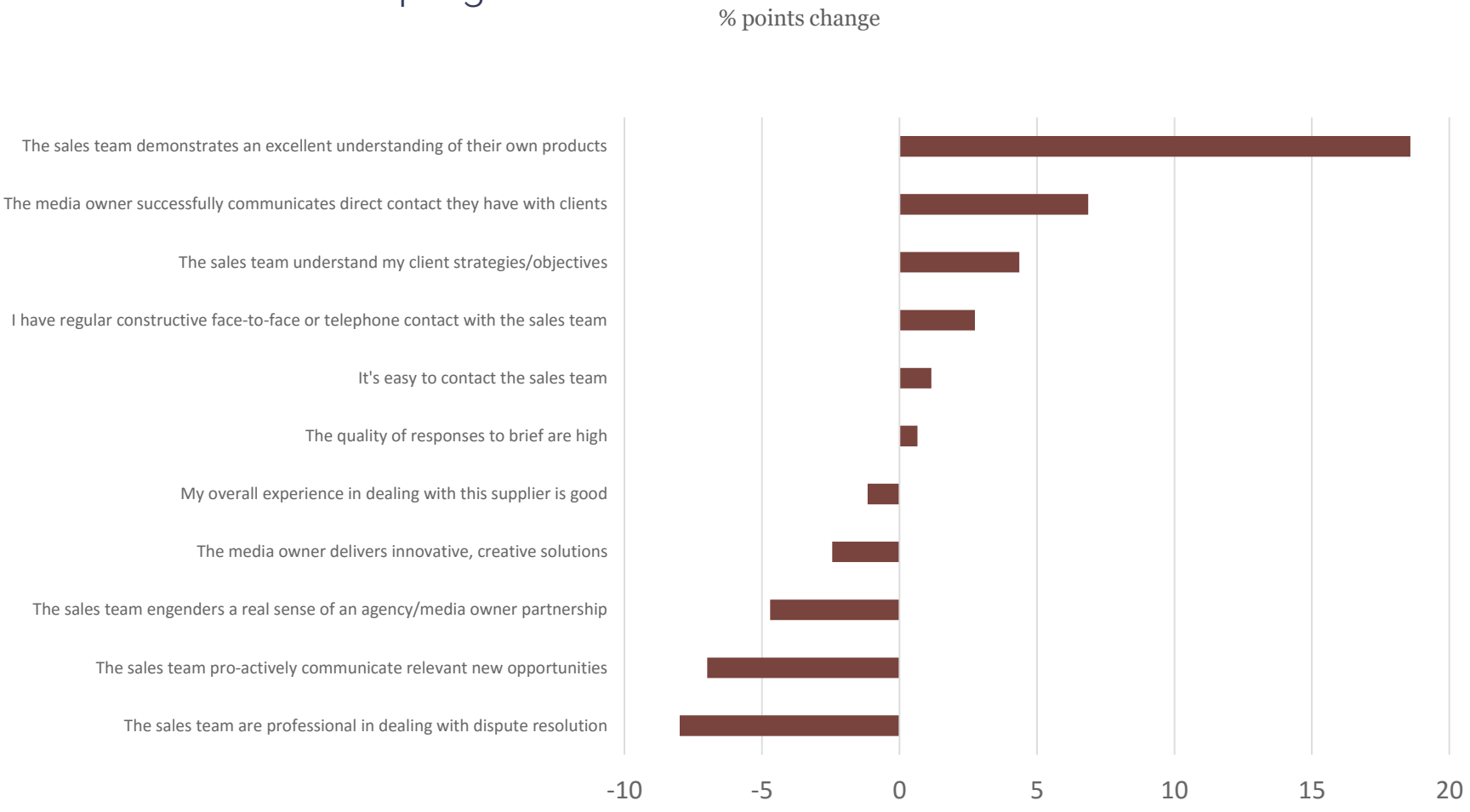
Twitter
Autumn 2018



Twitter
Autumn 2018 vs Spring 2018