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A MONTH IN MEDIA

July 2017



MOBILE USERS TO SURPASS 5.5BN BY 2022

Fuelled by continued growth in India and China global mobile penetration is expected to reach 70% of the world's population by 2022, almost double the number of users in 2008. India, the fastest growing mobile market will drive the majority of this growth. The continued adoption of XL smartphones (3.5-4.5 inches) is leading to a decline in tablet sales, falling from 615 million PA in 2016 to 579 million PA in the next 5 years.

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Implications

Mobile ads will continue to challenge the dominant channels of TV, OOH and Press advertising in markets such as India. However as of 2017, only 14.9% of all media bought in India was digital, as opposed to 45% TV and 29.2% Press. So whilst digital would appear to be in pole position as a media channel going forwards the traditional avenues should not be overlooked for the time being.

(Source TNYN 2017).

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ADVERTISING WATCHDOG TO GET TOUGHER ON GENDER STEREOTYPING

Advertisements in the UK that (for example) show men failing at simple household tasks and women left to clean up, are set to be banned by the ASA. They have stated that adverts which mock people for conforming to gender types or conform to gender roles “have costs for individuals, the economy and society”. The ASA did however state that not all stereotyping would be banned as women cleaning or men doing DIY tasks for example is as acceptable as “only having men cleaning and only women doing DIY”.

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Implications

This new rule, gives people legal ground on which to challenge overtly sexist advertising. Along with initiatives such as ‘Glass Lions’ which excludes any ads that objectify women or men, from consideration for Cannes Lions awards, these stricter guidelines are seen as a positive step in an industry that has, at times, been accused of gender stereotyping. This will have a positive effect as creatives will be challenged to think outside of the ‘obvious box’ and as a result are likely to create more engaging and relevant content.

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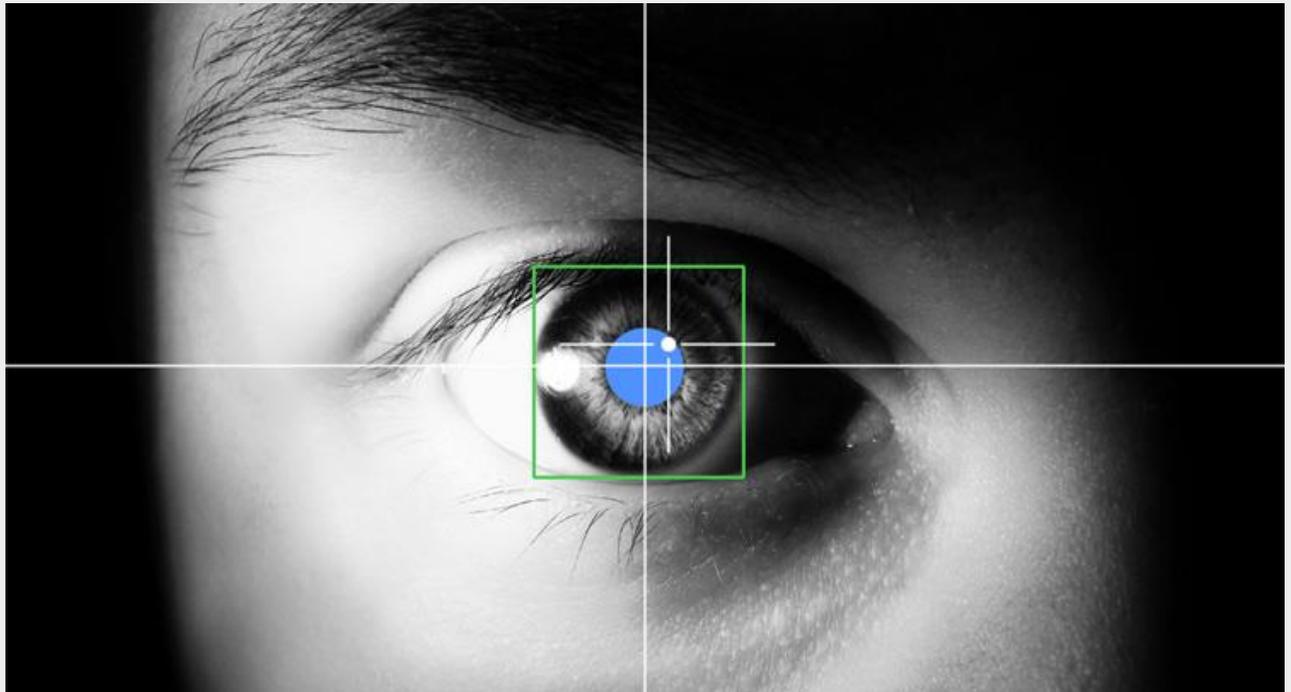
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EYE TRACKING TECHNOLOGY BEGINING TO DRIVE SALES

Recent advances in eye tracking technology by companies such as Affectiva and Modiface are beginning to change the way brands develop their TV and digital ads. Smashbox have recently partnered with Modiface (an AR provider) to track what content a user is most interested in, based on their eye movements, allowing them to tailor their marketing accordingly. Smashbox claim to have seen an increase in conversion rates of 27%. There are suggestions that both Audi and BMW are planning on using the same technology for their latest campaigns.

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Implications

For some time now the potential for eye tracking technology developments and personalised adverts have been widely discussed, however, the reality of creating a series of ads depending on peoples emotions is not cost effective. This technology, could not only be used to provide specific feedback on individual adverts, but also potentially provide data on whether or not an ad has actually been watched, adding a further layer to ad verification.

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BELLWETHER REPORT

The IPA's latest Bellwether report has shown UK marketers' digital budgets have increased to their highest rate in a decade. The survey from Q2 2017 reported that 32% of marketers surveyed recorded an increase in their internet marketing budgets which helped drive overall marketing budgets. Other findings were that more than a quarter of respondents have a lower level of optimism in the financial prospects of their industry. The second lowest figures for 4.5 years.

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Implications

The IPA'S Paul Bainsfair commented that the increase in digital spending is driven by a desire to 'seek out more activation driven advertising.' A separate report carried out by Magnetic and Enders Analysis revealed a shift away from a 40:60 direct response/brand split in expenditure to a 50:50 one driven by companies coming under pressure to deliver to shareholders, with 80% of CEOs saying they would "decline to make an investment to fuel innovation if it meant missing one quarter of earnings results". GroupM's Lindsay Patterson has highlighted the need for new models of working that can form a bridge between the short term, data optimisation model and longer term brand building strategies.

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GoT: ILLEGAL DOWNLOADS & NON LINEAR VIEWING

The first episode of the new season (7) of Game of Thrones was illegally viewed or downloaded 90 million times within the first 3 days. These figures underline the huge challenge content producers have in protecting content. In parallel, recent MEC research reported that linear TV viewing across European 18-25 year olds was down 2.25% YoY 2015 -2016. And, of the 1.8m UK viewers who watch Game of Thrones, only 21% (381k) watch the live linear transition.

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Implications

With the high numbers of illegal viewing GoT, HBO are losing serious value in their audience. When you consider that the vast majority are also watching on VOD or Catch-Up, it begins to highlight the importance for advertisers to explore all avenues when partnering with such TV shows.

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YOUTUBE TV CONTINUES TO GROW US FOOTPRINT

YouTube TV, Google's rival to competitors such as Netflix and Amazon Prime, is now available in 10 more American cities. For a monthly subscription of \$35 per month, users can access live local feeds from all 4 major US broadcasters (including FOX & NBC), live sports, and a daily selection of YouTube's most popular videos. Although its lack of film and TV series content means it isn't considered as a direct competitor to Netflix and Prime just yet ... the channel is growing and with over 50% of their viewers aged 13-34, their audience base is far younger than that of their competitors.



Implications

YouTube TV has managed to attract a significant proportion of the youth, making it a notable advertising platform to target younger audiences. It will be interesting to see how it develops outside of the USA and if competitors begin to recognise it as a serious threat to their offerings by widening their live TV offering and developing partnerships with key broadcasters.