IPA Digital Media Group
Digital Media Owners Image Survey
Spring 2015

Research Methodology

- Fieldwork for the survey was undertaken between March 11th and April 1st 2015
- 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 – 363 survey responses were received.
- 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 14 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.

Key findings
Overall "Grand Prix"

- Teads leads the overall "Grand Prix" category regarding agencies' overall experience of dealing with media owners, with a score of 84.9%. Along with Say Media, Quantcast and Inskin Media it is one of 4 media owners to achieve a score in excess of 80%, while Collective, which led the rankings in the Autumn 2014, has a score of 79.7%.
- An additional 8 media owners achieved a score in excess of 70%.
- Only 2 media owners (Facebook and LinkedIn) achieved a score of less than 50%.
- AOL Advertising leads online pure plays with a score of 72.7% while The Guardian leads the crossover media category with a score of 73.4%.
- None of the media owners covered by the survey have seen their "Grand Prix" score fall by 10 percentage points or more. Four (Facebook, ITV.com, Twitter and AOL Advertising) are the only media owners to see their score decline by more than 5 percentage points.

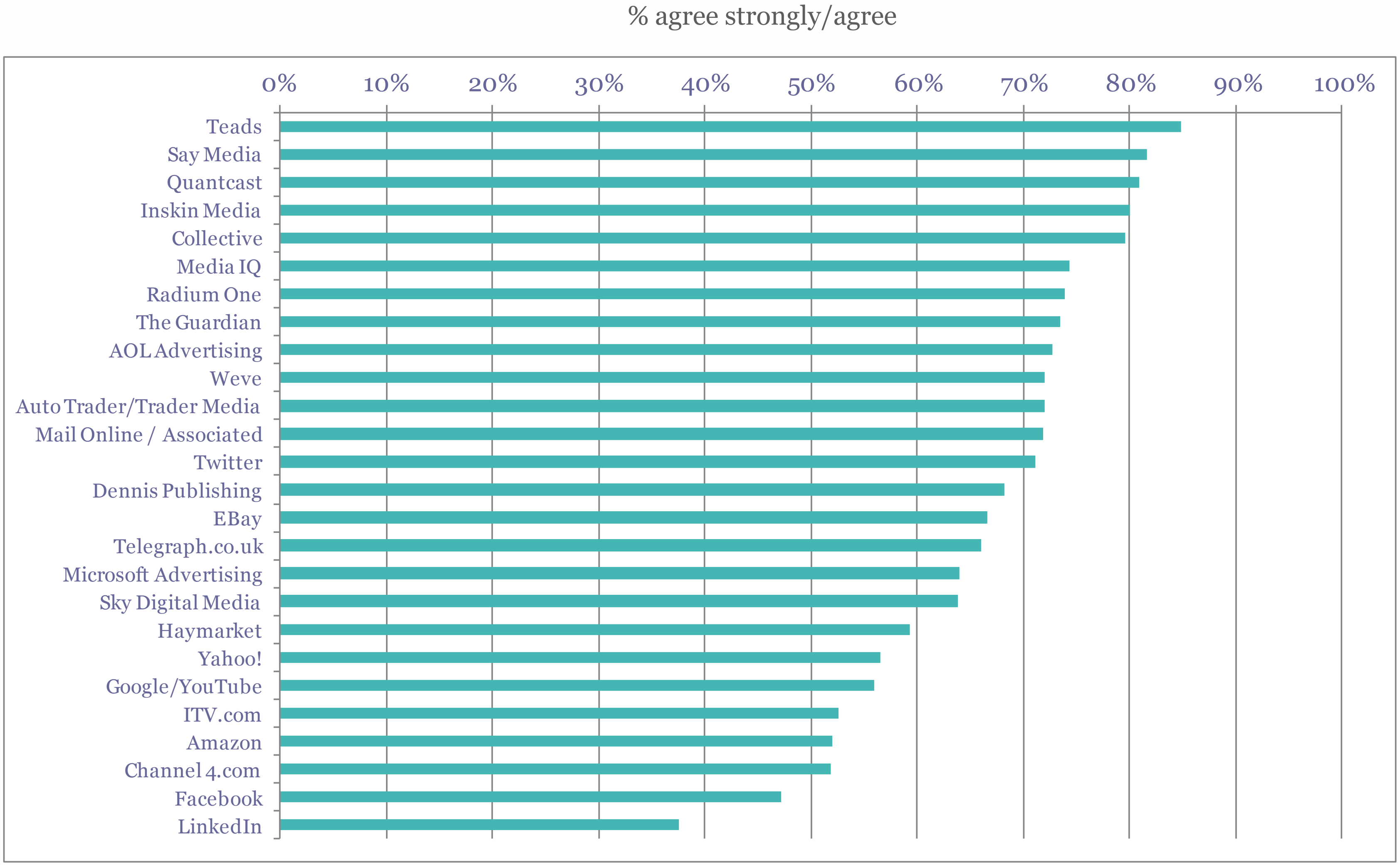
Key findings

- Aside from the “Grand Prix”, Say Media leads in 4 categories (Quality of Response to Brief, Dispute Resolution, Creative Solutions and Post-campaign support), Auto Trader/Trader Media leads in 3 (Regular Contact, Agency/Media Owner Partnership and Communicating Direct Contact with Clients) and MediaIQ in 2 (Understanding of Client Objectives and Strategies and Mid-campaign support) while Quantcast (Understanding of Own Products), Twitter (Communication of Relevant New Opportunities) and Inskin Media (Easy to Contact the Sales Team) each lead in 1.
- Telegraph.co.uk leads the other cross-over media owners in demonstrating a good understanding of how cross-media opportunities can be exploited.
- Telegraph.co.uk has seen an improvement of 10 percentage points or more across 7 categories while Dennis Publishing and Inskin Media and Say Media have improved to a similar extent across 4 categories; Collective, Channel 4.com, MailOnline/Associated, Sky Digital Media, The Guardian and Weve across 3 categories
- Yahoo! has seen an improvement in scores across each of the 13 categories into which it falls

Key findings

- Amazon, Facebook, ITV.com and Twitter have all seen declines of 10 percentage points or more in relation to 2 categories each.

My overall experience of dealing with this supplier is a good one
Spring 2015



My overall experience in dealing with this supplier is good
Ad Networks, Exchanges & Sales Houses
Spring 2011 – Spring 2015

	Spring '11	Autumn '11	Spring '12	Autumn '12	Spring '13	Autumn ‘13	Spring ‘14	Autumn ‘14	Spring ‘15
	%	%	%	%	%	%	%	%	%
TEADS									84.9
SAY MEDIA					83.1	75.4	80.8	78.1	81.7
QUANTCAST									80.8
INSKIN MEDIA					83.8	78.9	77.2	75.3	80.0
COLLECTIVE MEDIA					78.3	68.0	75.4	81.8	79.6
MEDIA IQ									74.3
RADIUM ONE									73.9
WEVE							73.4	67.1	72.0

My overall experience in dealing with this supplier is good
Online Pure Plays
Spring 2011 – Spring 2015

	Spring '11	Autumn '11	Spring '12	Autumn '12	Spring '13	Autumn '13	Spring '14	Autumn '14	Spring '15
	%	%	%	%	%	%	%	%	%
AOL ADVERTISING	61.6	71.0	77.5	80.4	80.0	78.7	84.2	78.7	72.7
AUTO TRADER/TRADER MEDIA									71.2
TWITTER					72.7	71.7	76.5	79.8	71.1
MICROSOFT ADVERTISING	36.0	48.6	56.8	68.0	58.1	74.6	65.8	62.2	64.0
GOOGLE /YOUTUBE	44.1	51.0	56.9	54.5	59.9	55.3	57.3	54.4	56.0
YAHOO!	58.8	58.6	53.2	68.3	47.5	65.0	65.4	47.5	56.5
AMAZON							52.2	44.7	52.1
FACEBOOK	54.7	68.8	64.0	58.8	51.2	47.0	45.1	54.0	47.2
LINKEDIN									37.5

My overall experience in dealing with this supplier is good
Crossover Media Owners
Spring 2010 – Spring 2015

	Spring '11	Autumn '11	Spring '12	Autumn '12	Spring '13	Autumn '13	Spring '14	Autumn '14	Spring '15
	%	%	%	%	%	%	%	%	%
THE GUARDIAN	56.4	60.5	58.9	60.0	59.9	68.8	74.2	65.4	73.4
MAILONLINE/ASSOCIATED							84.4	69.1	71.9
DENNIS PUBLISHING							83.3	71.4	68.2
TELEGRAPH.CO.UK	60.7	64.5	70.5	80.6	80.2	76.7	83.0	60.7	66.0
SKY DIGITAL MEDIA	44.9	42.2	52.8	49.1	50.0	65.6	62.3	66.7	63.9
HAYMARKET									59.3
ITV.COM	43.8	37.0	33.3	50.9	51.0	56.3	46.2	59.6	52.6
CHANNEL4.COM	58.5	49.4	47.8	52.9	58.3	55.6	55.4	46.9	51.8

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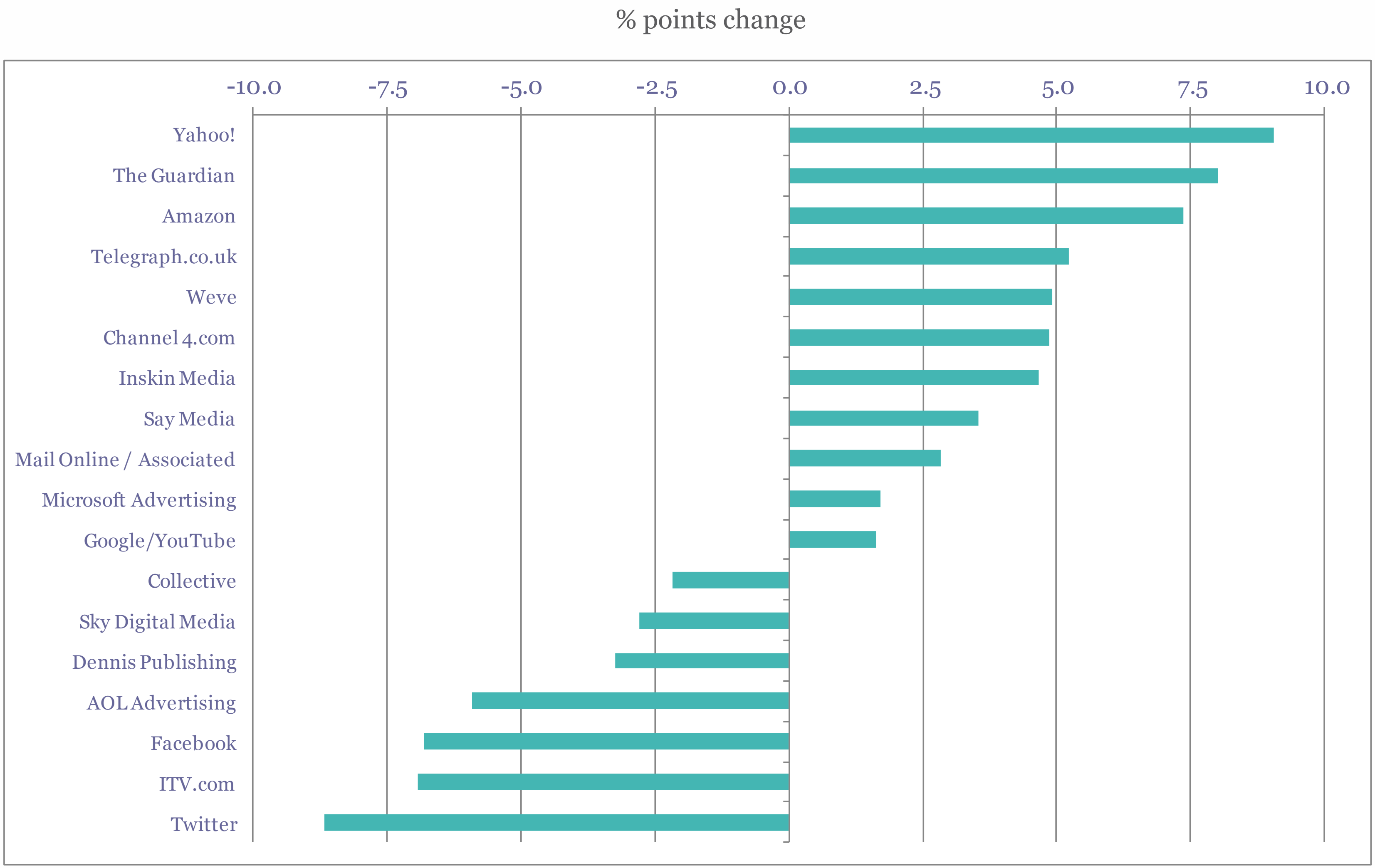
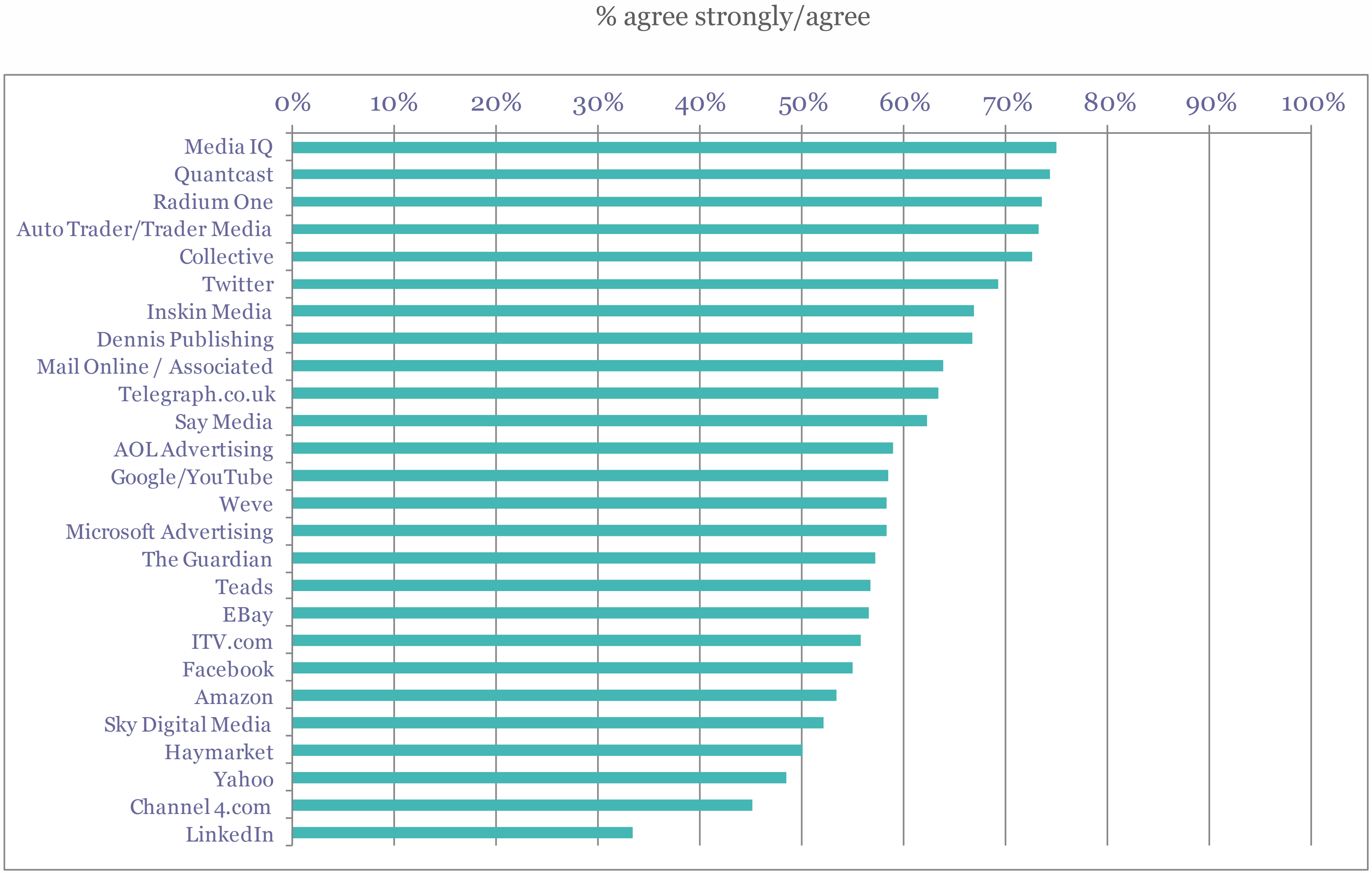
Spring 2015 vs. Autumn 2014



The sales team understand my client strategies/objectives
Spring 2015



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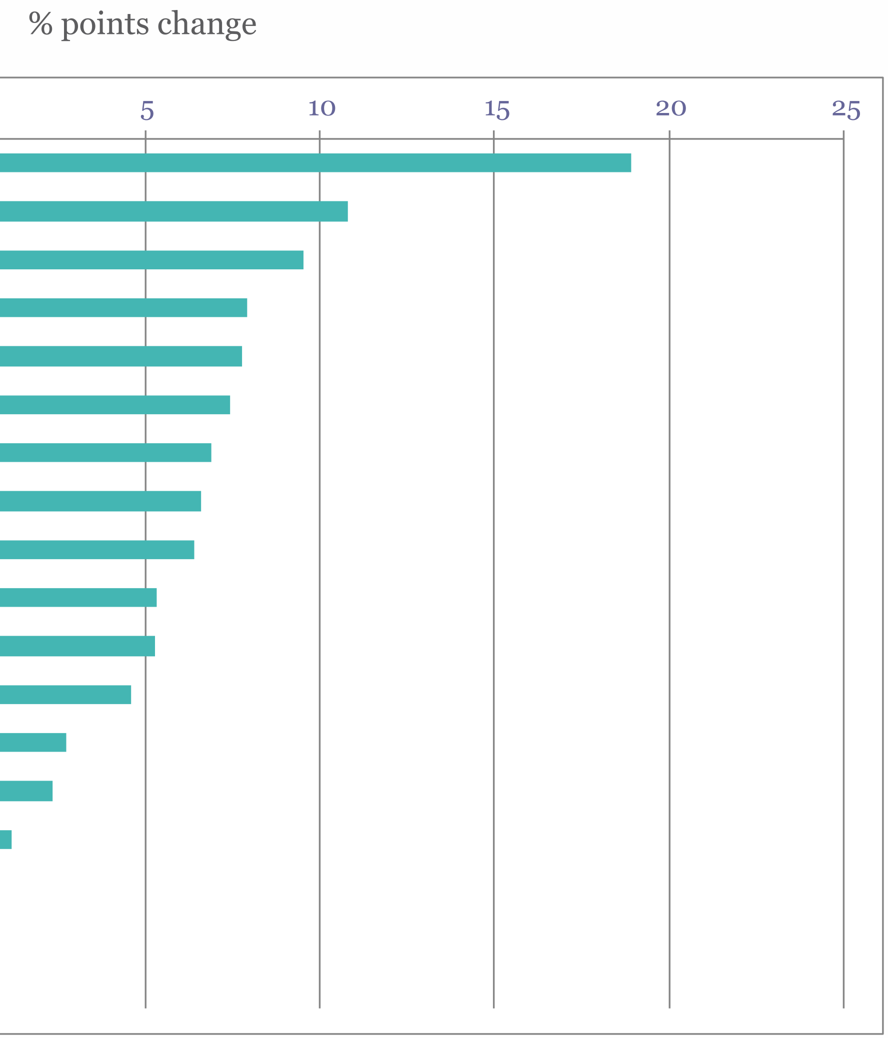

The quality of responses to brief are high
Spring 2015

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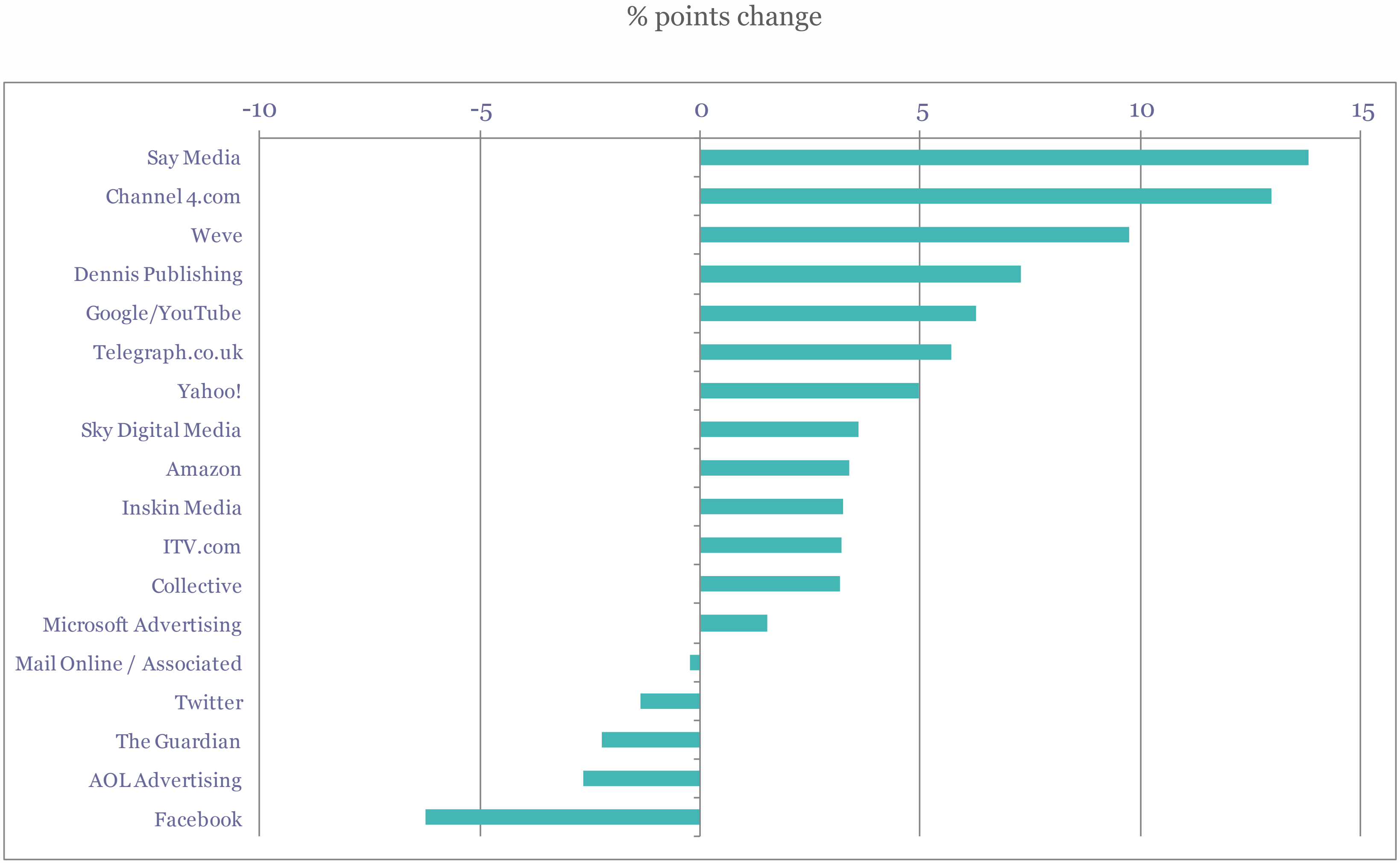
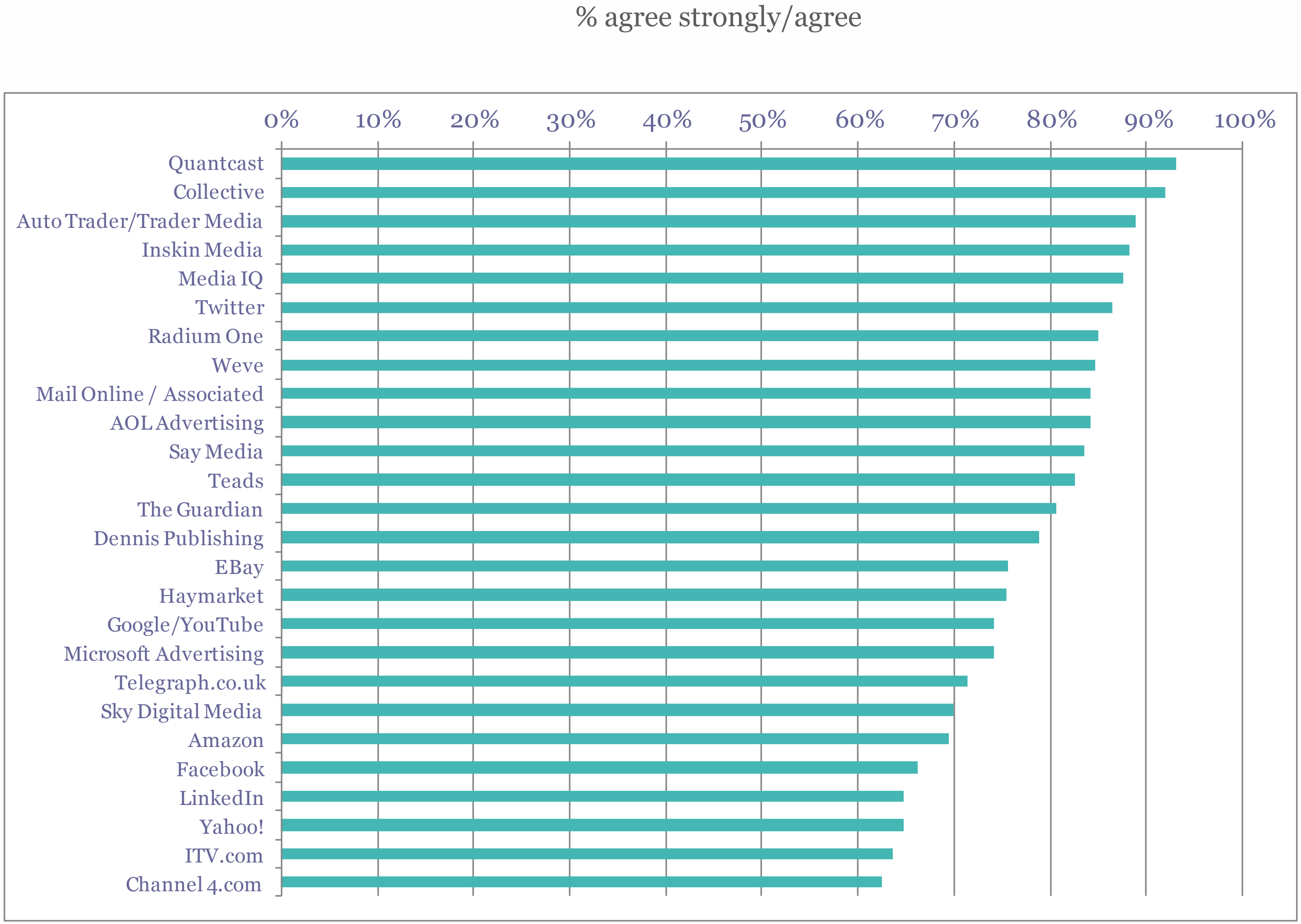
Spring 2015 vs. Autumn 2014



The sales team demonstrates an excellent understanding of their own products
Spring 2015



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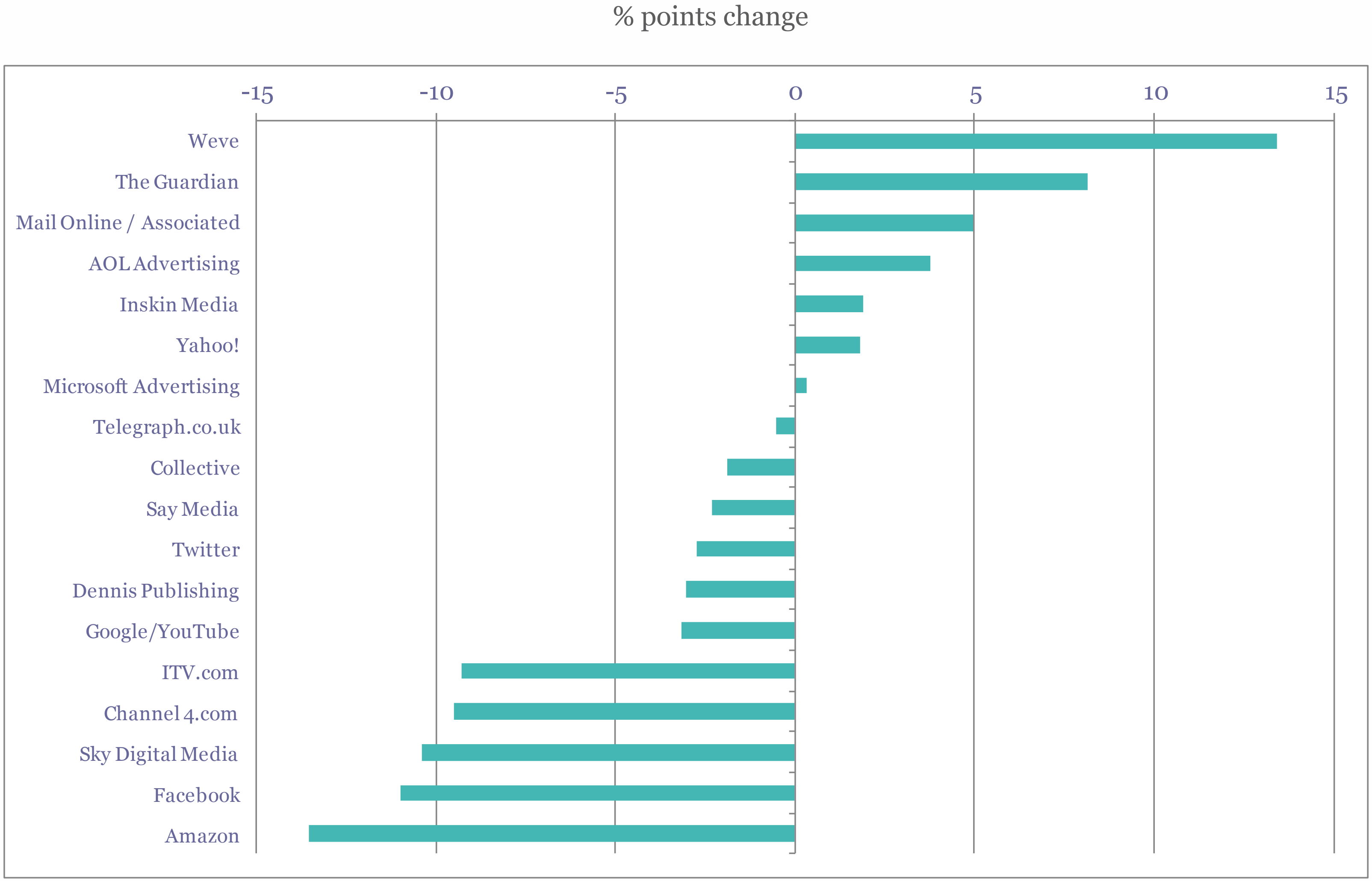
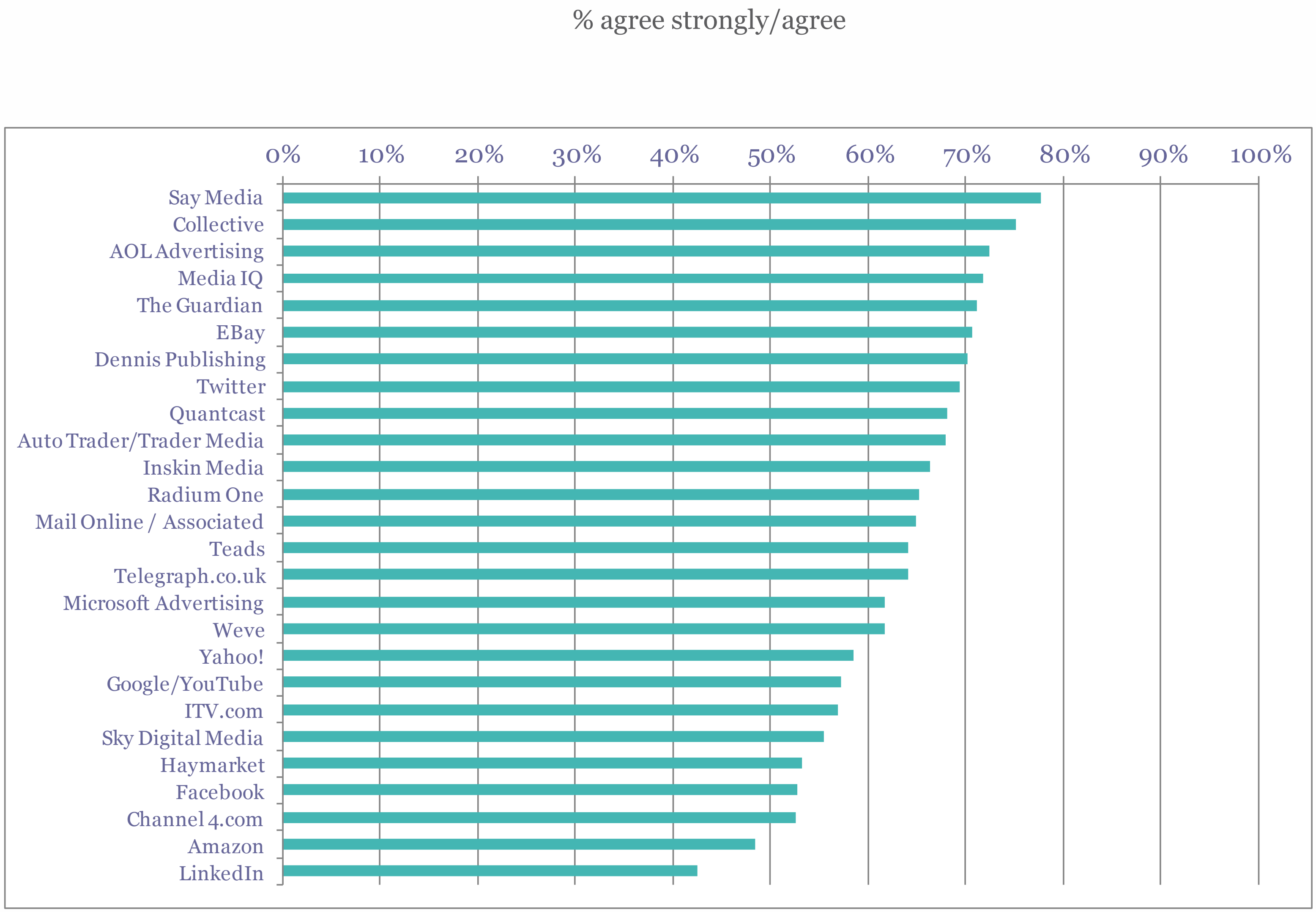


The sales team are professional in dealing with dispute resolution
Spring 2015



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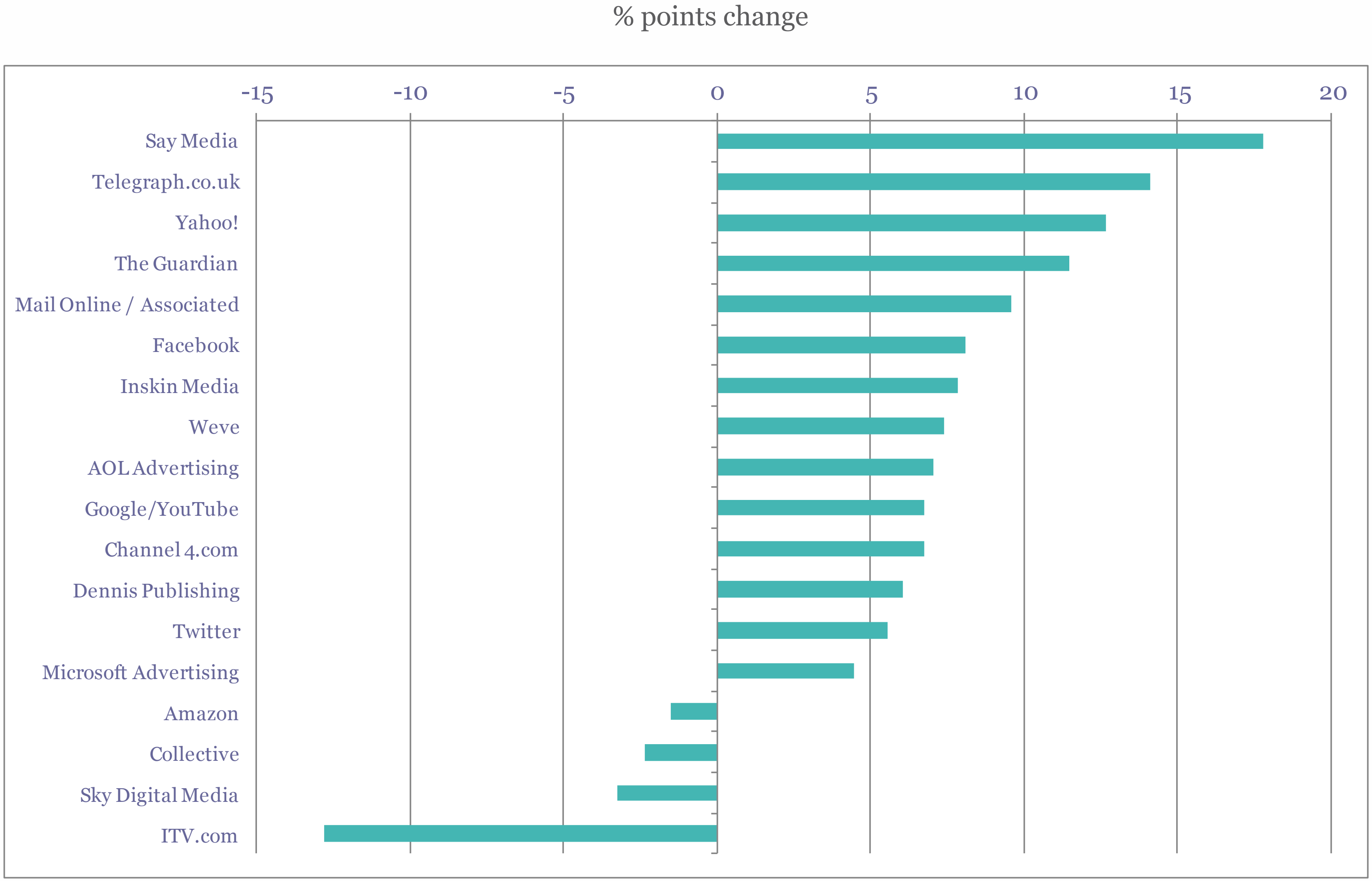
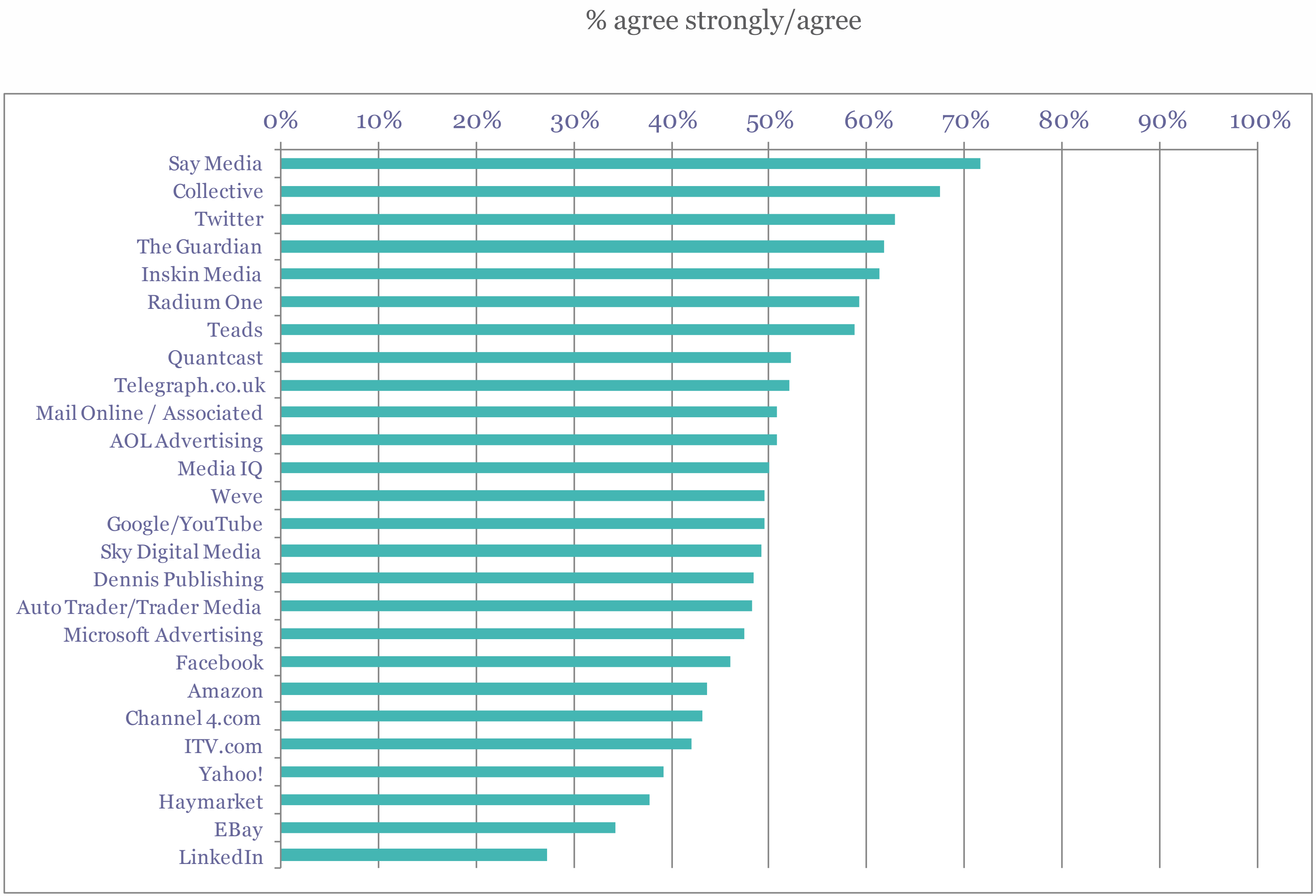


The media owner delivers innovative, creative solutions
Spring 2015



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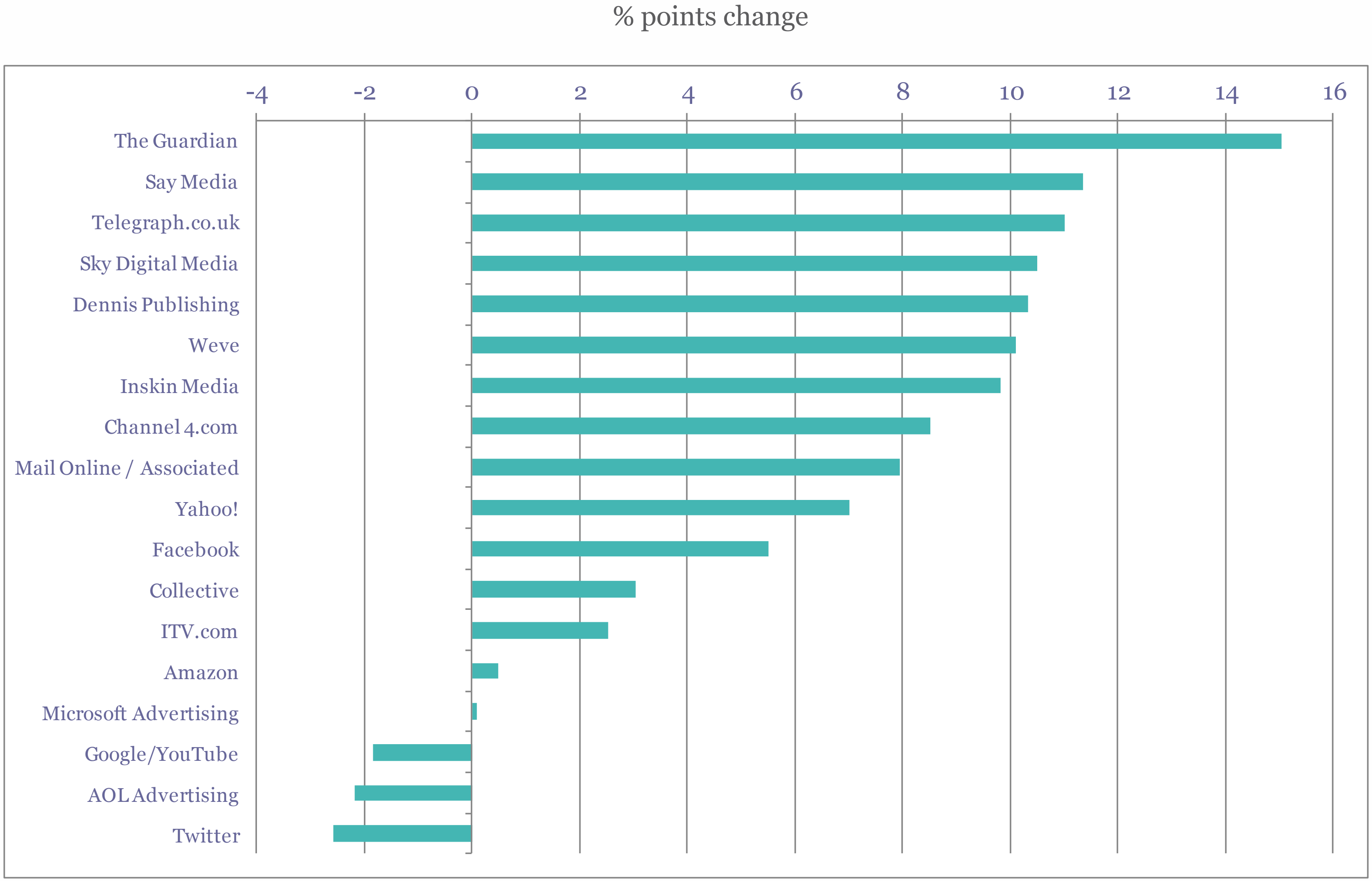
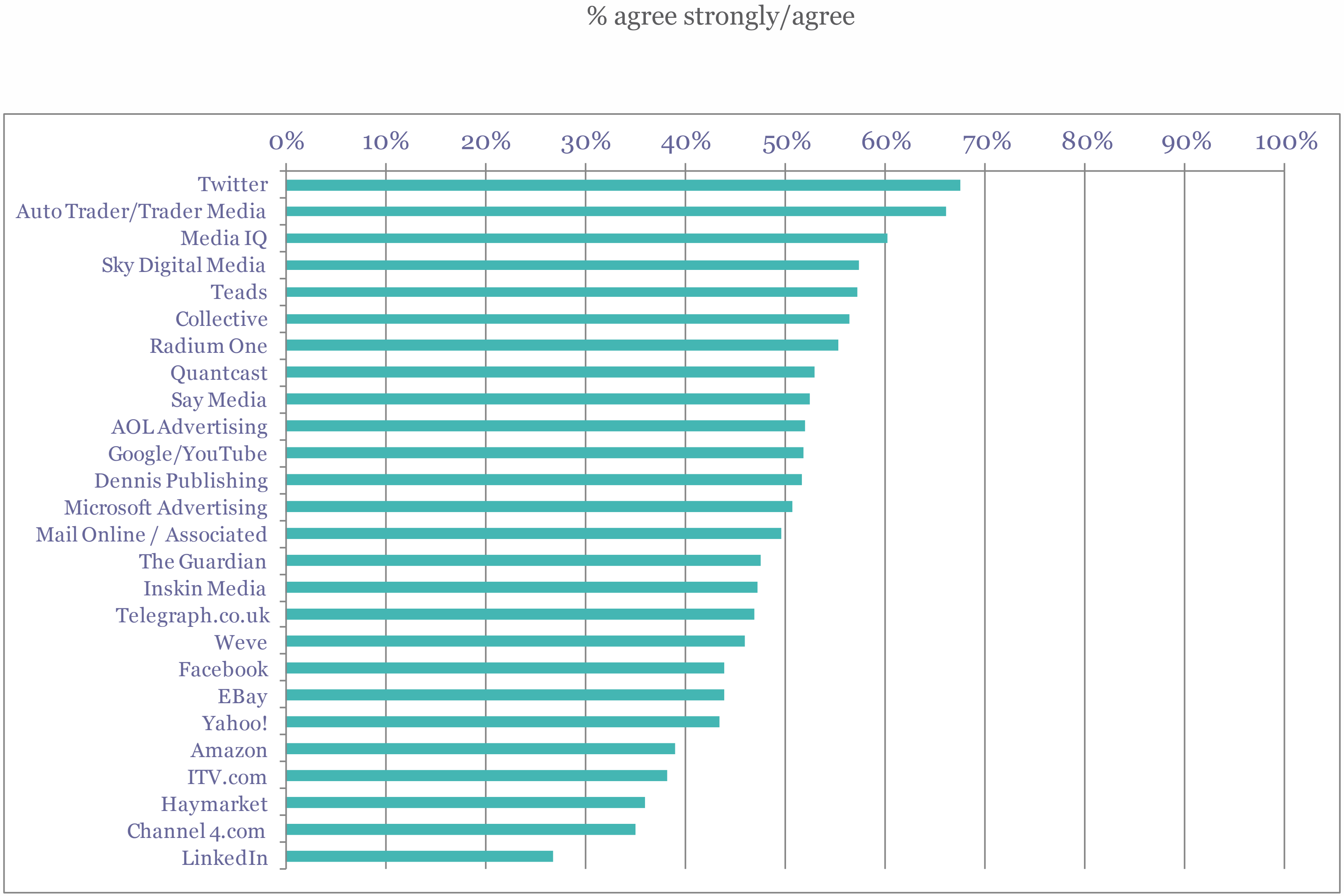


The sales team pro-actively communicate relevant new opportunities Spring 2015



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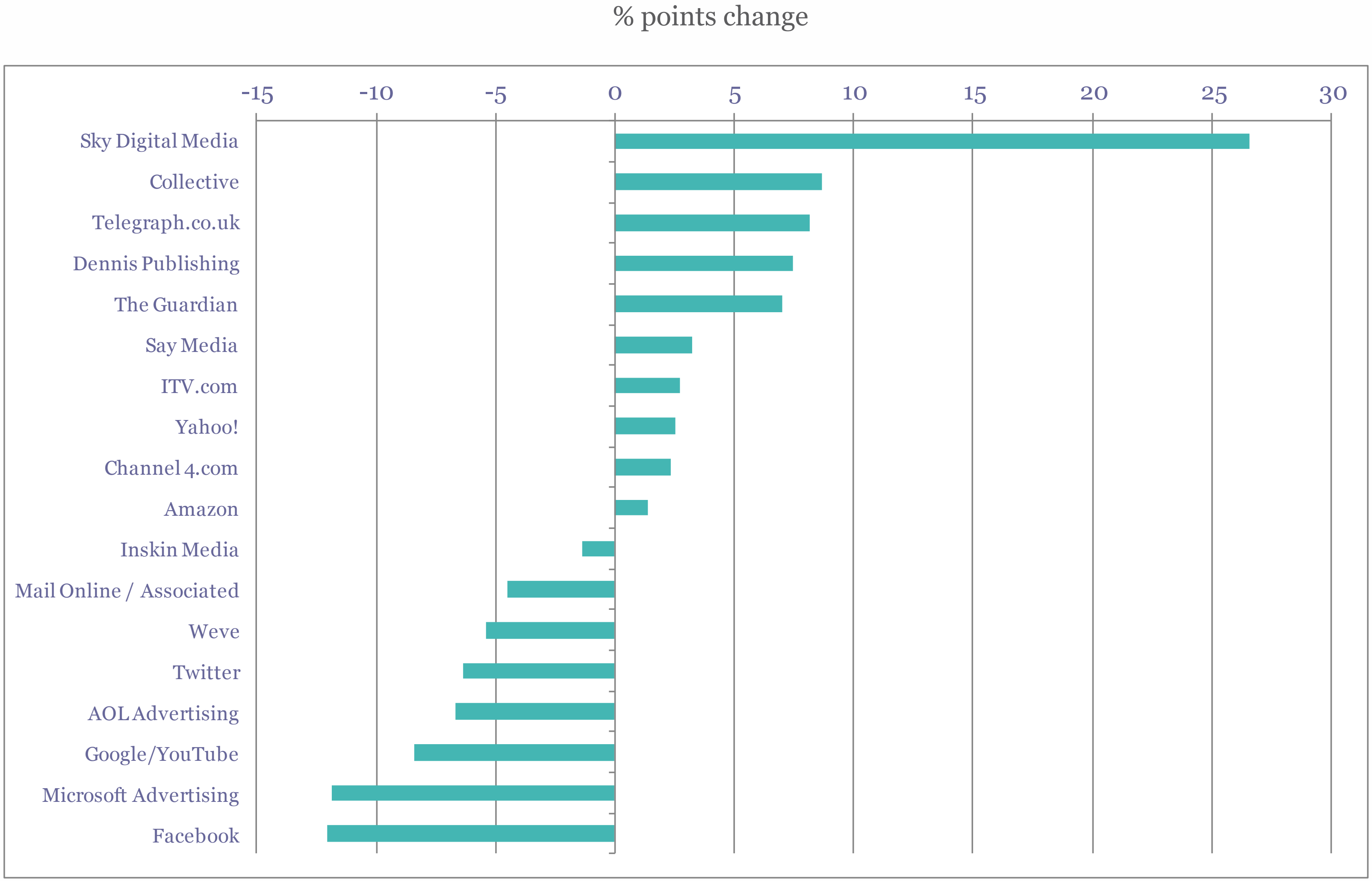
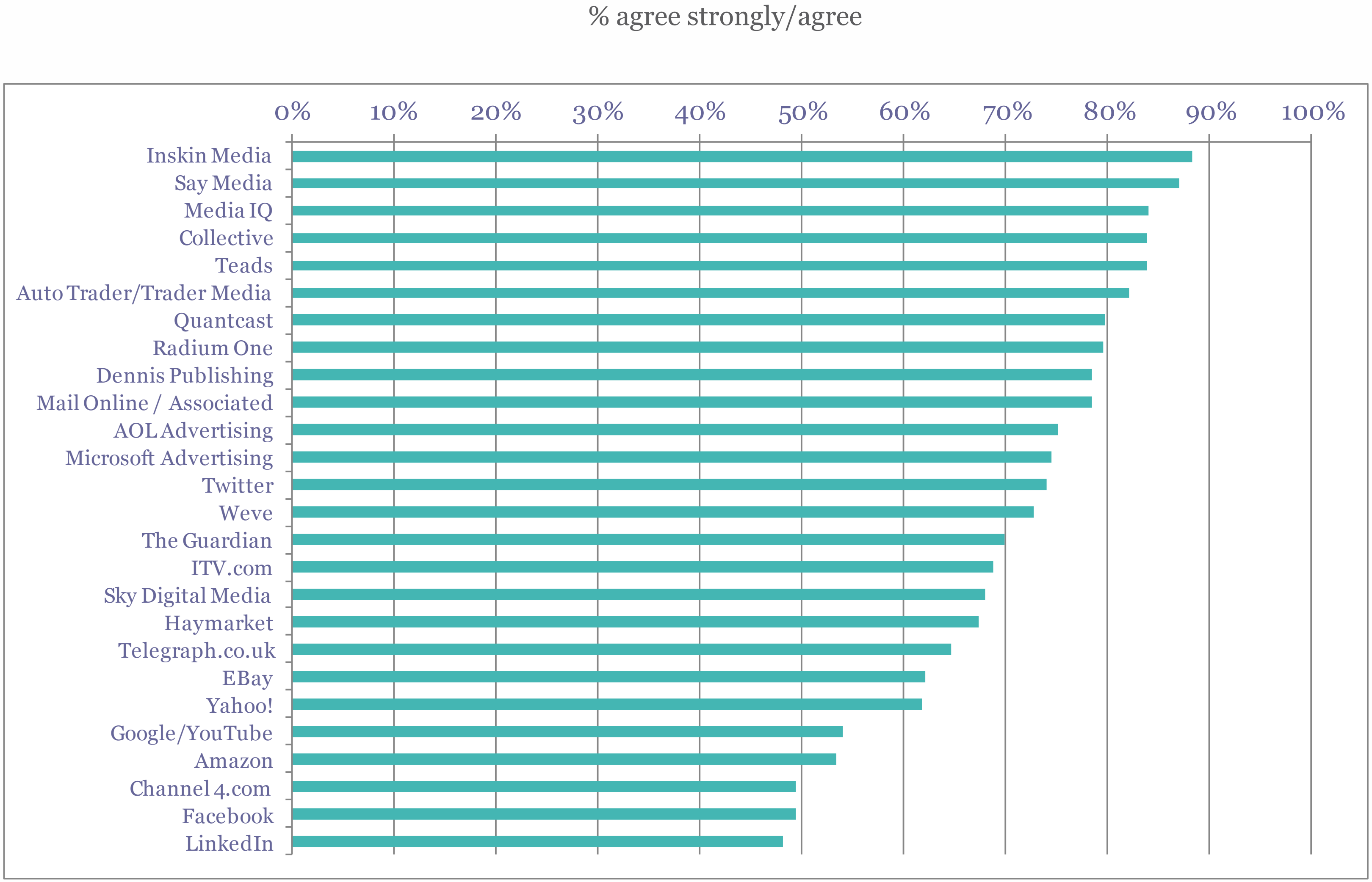
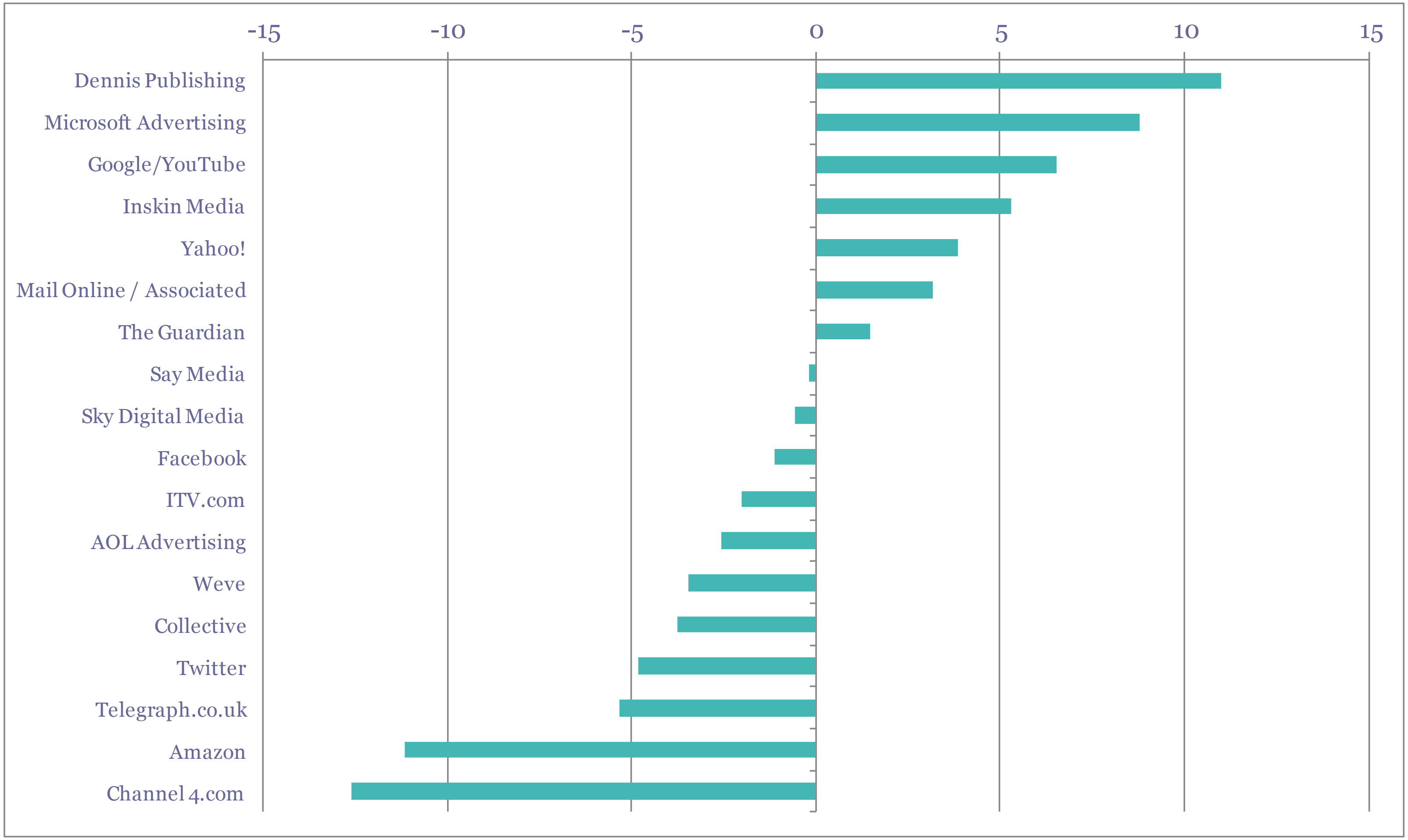


It's easy to contact the sales team
Spring 2015



It's easy to contact the sales team
Spring 2015 vs. Autumn 2014

% points change



I have regular constructive face-to-face or telephone contact with the sales team
Spring 2015

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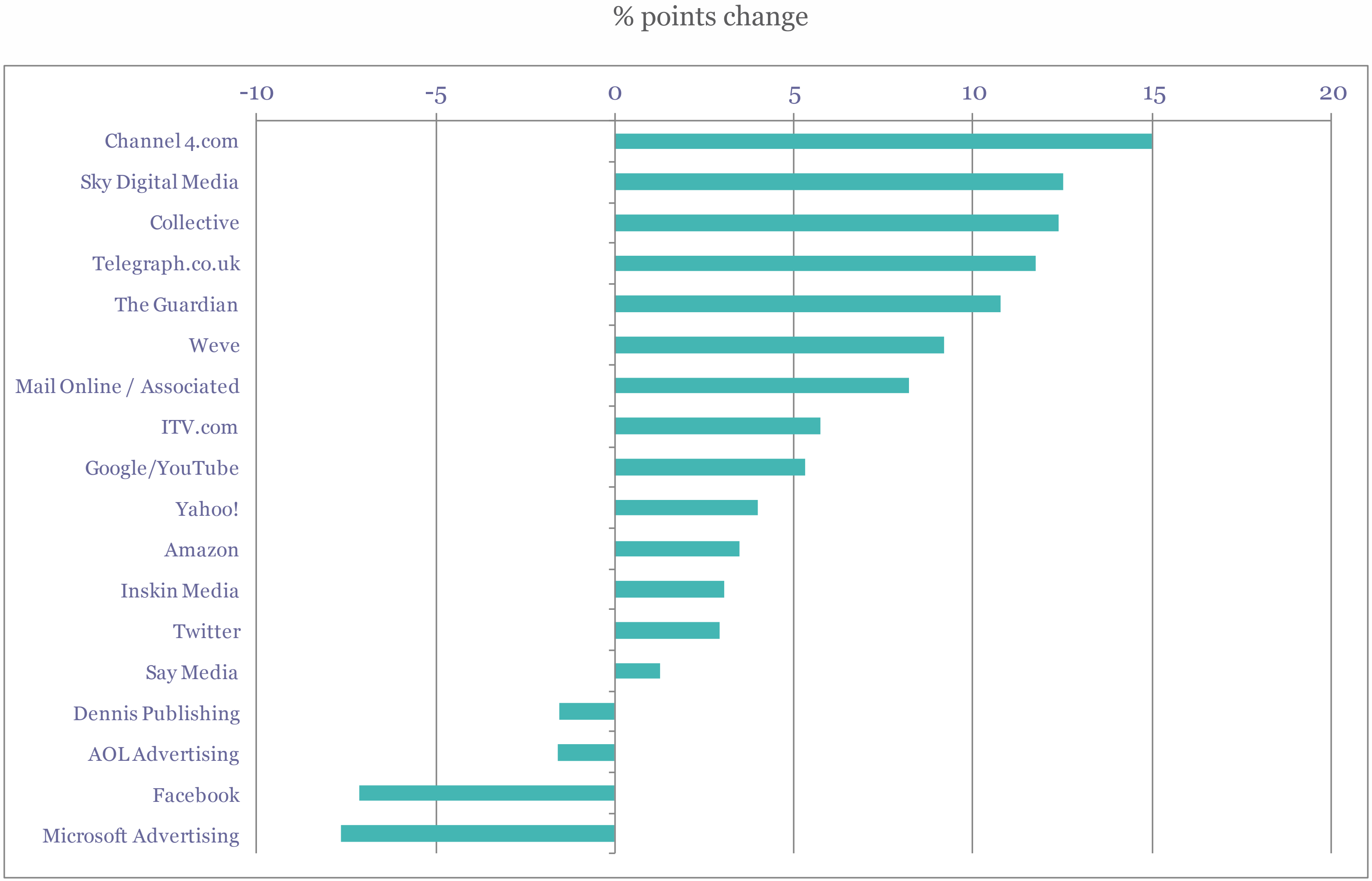
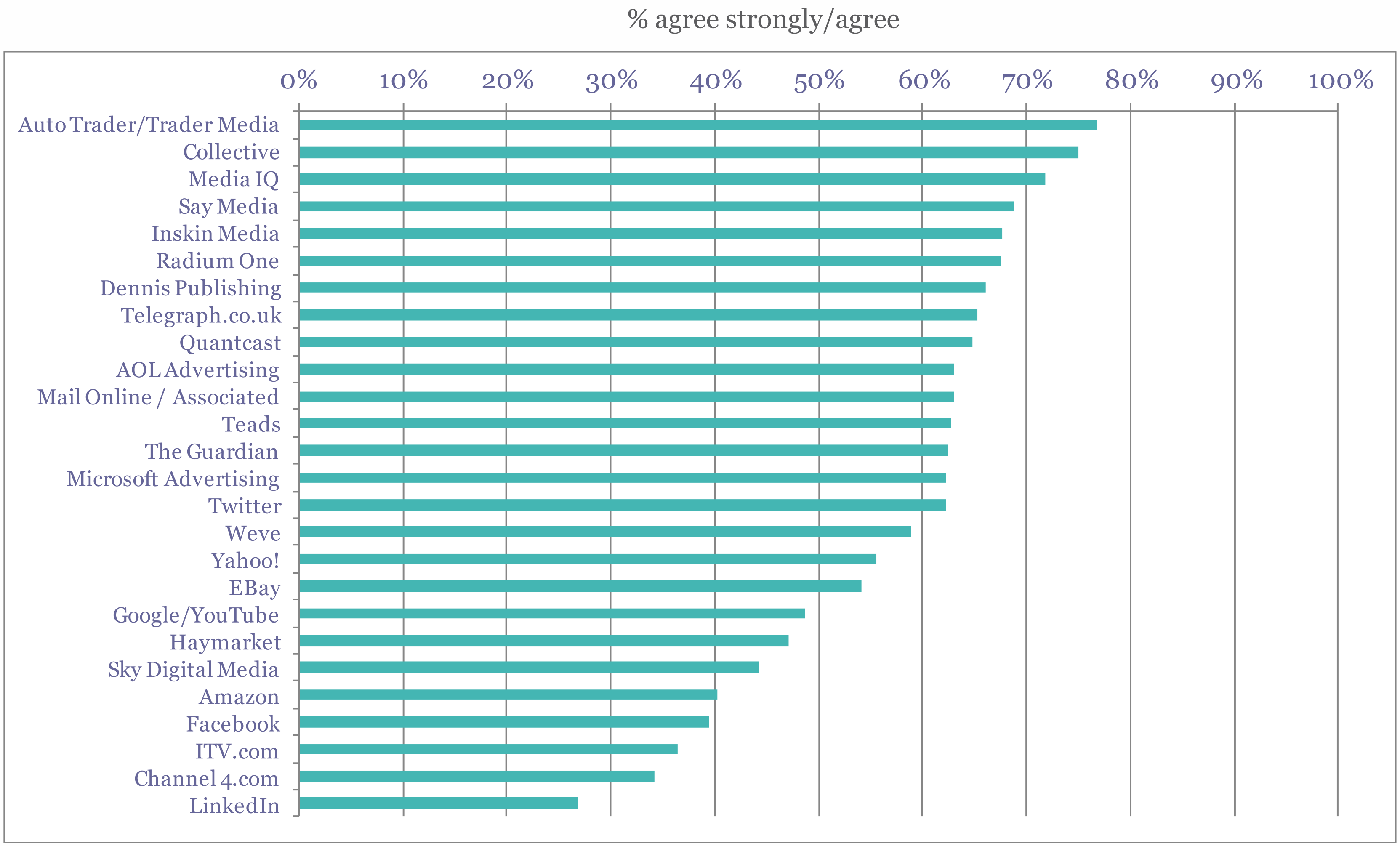
Spring 2015 vs. Autumn 2014



The sales team engenders a real sense of an agency/media owner partnership
Spring 2015



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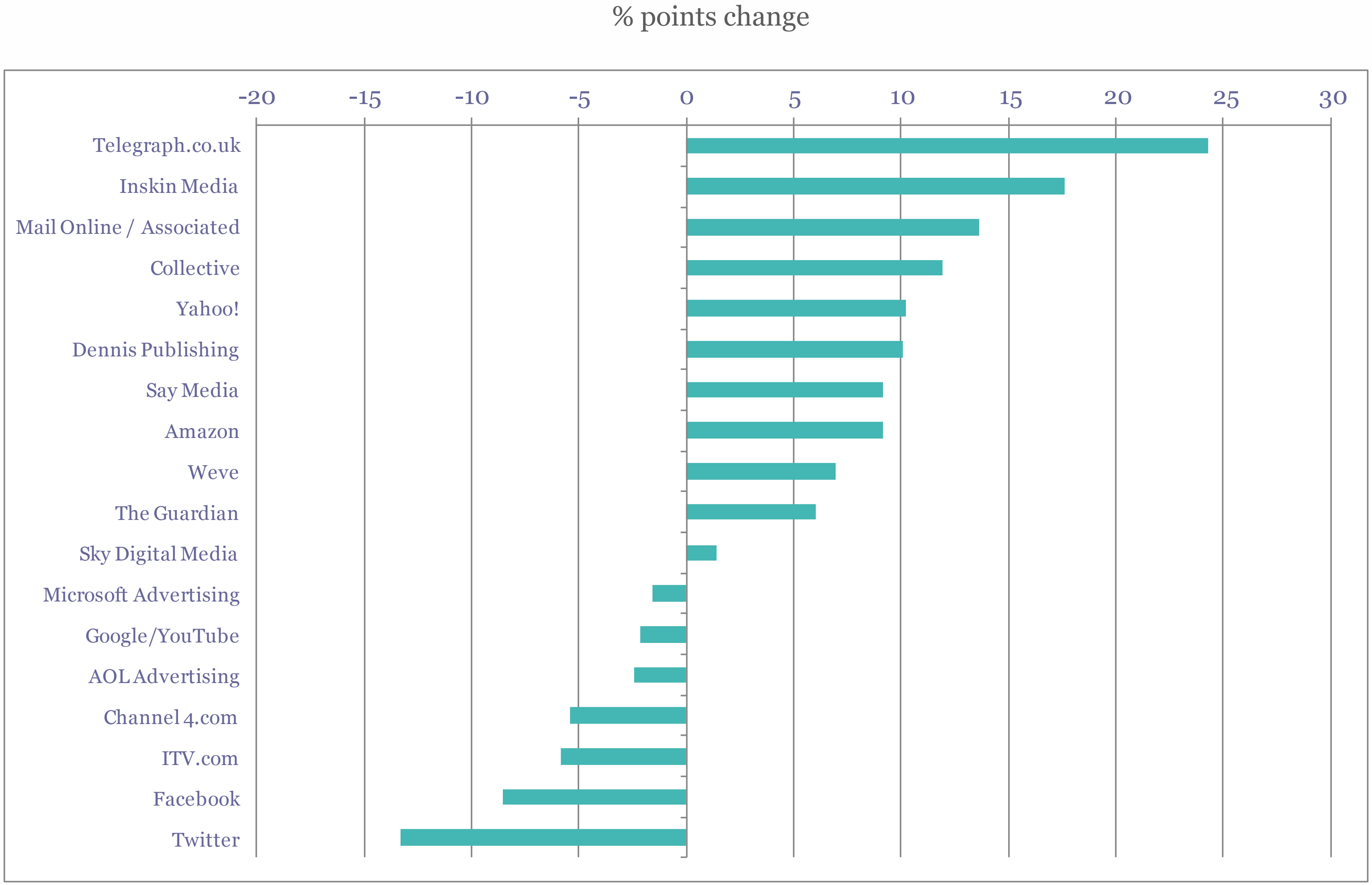
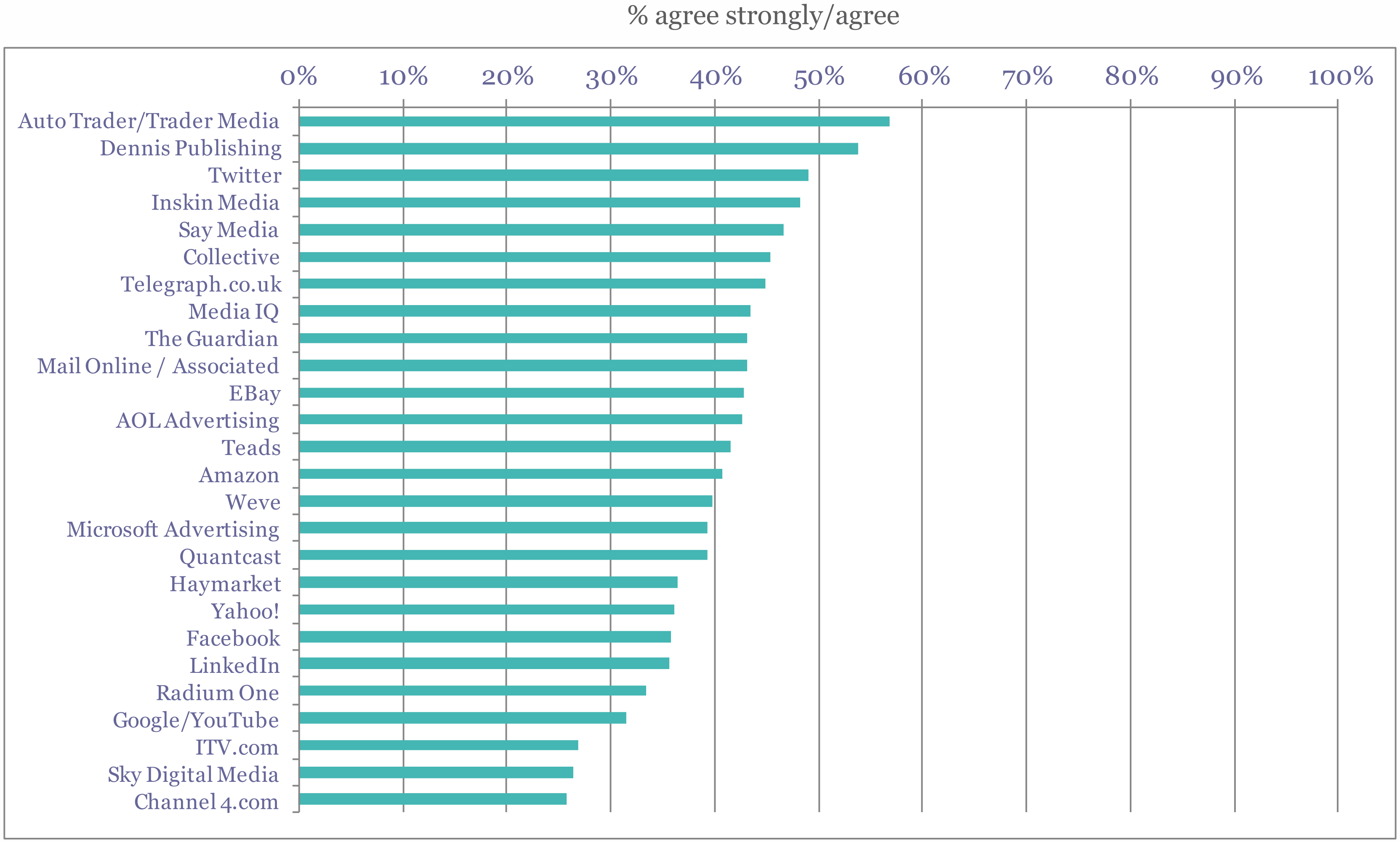


The media owner successfully communicates direct contact they have with clients
Spring 2015



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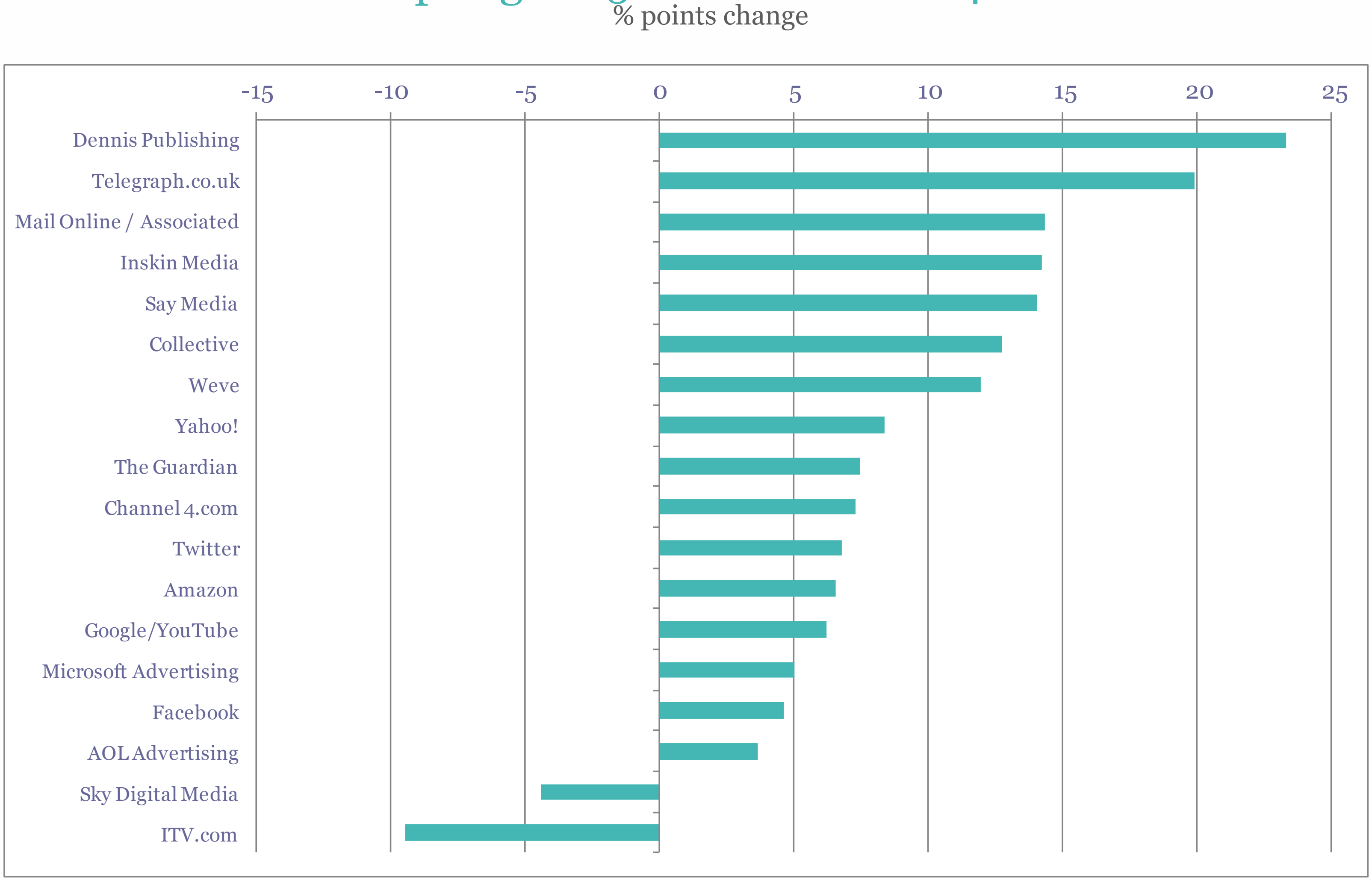
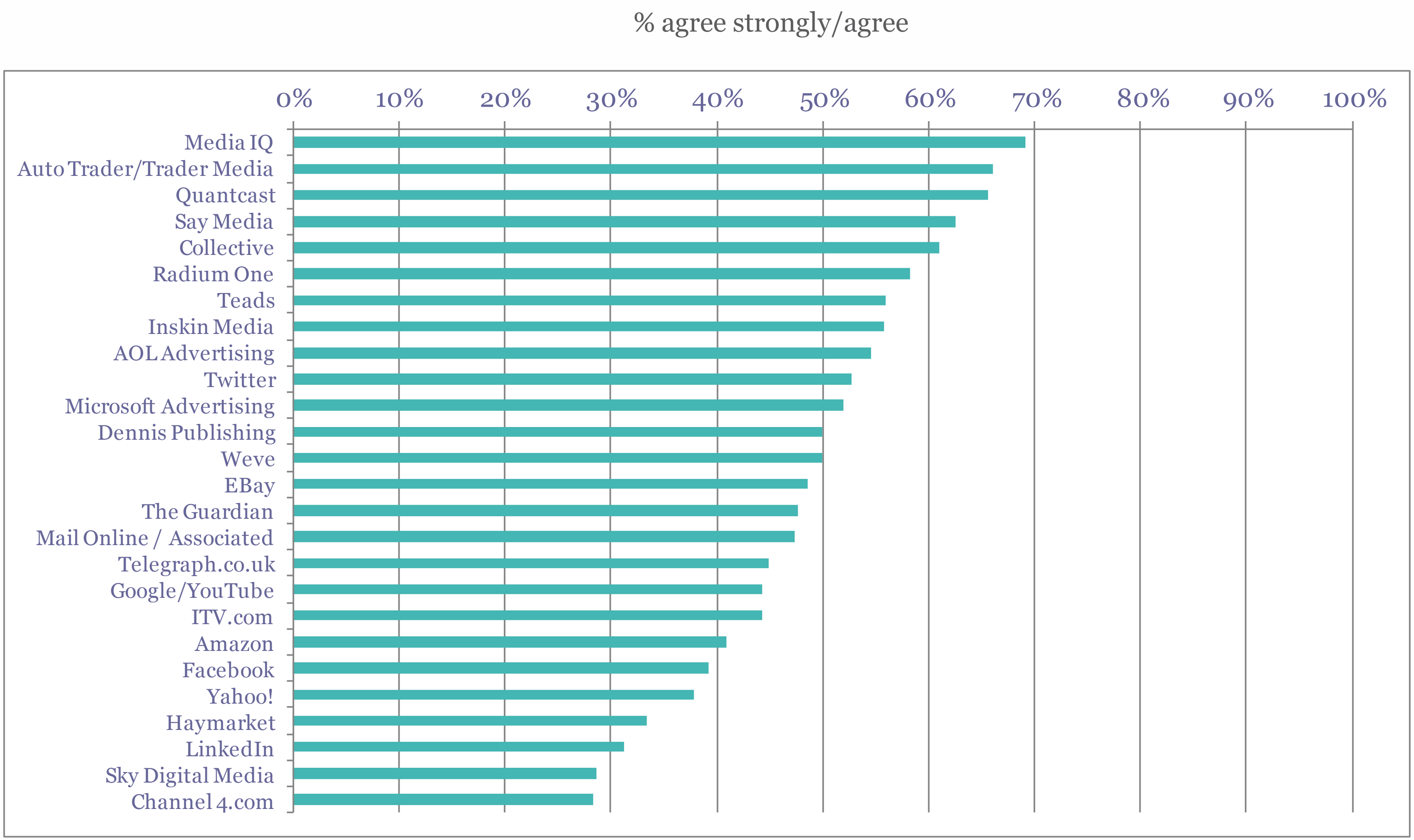


We receive adequate mid-campaign support (e.g. trafficking and optimisation) Spring 2015



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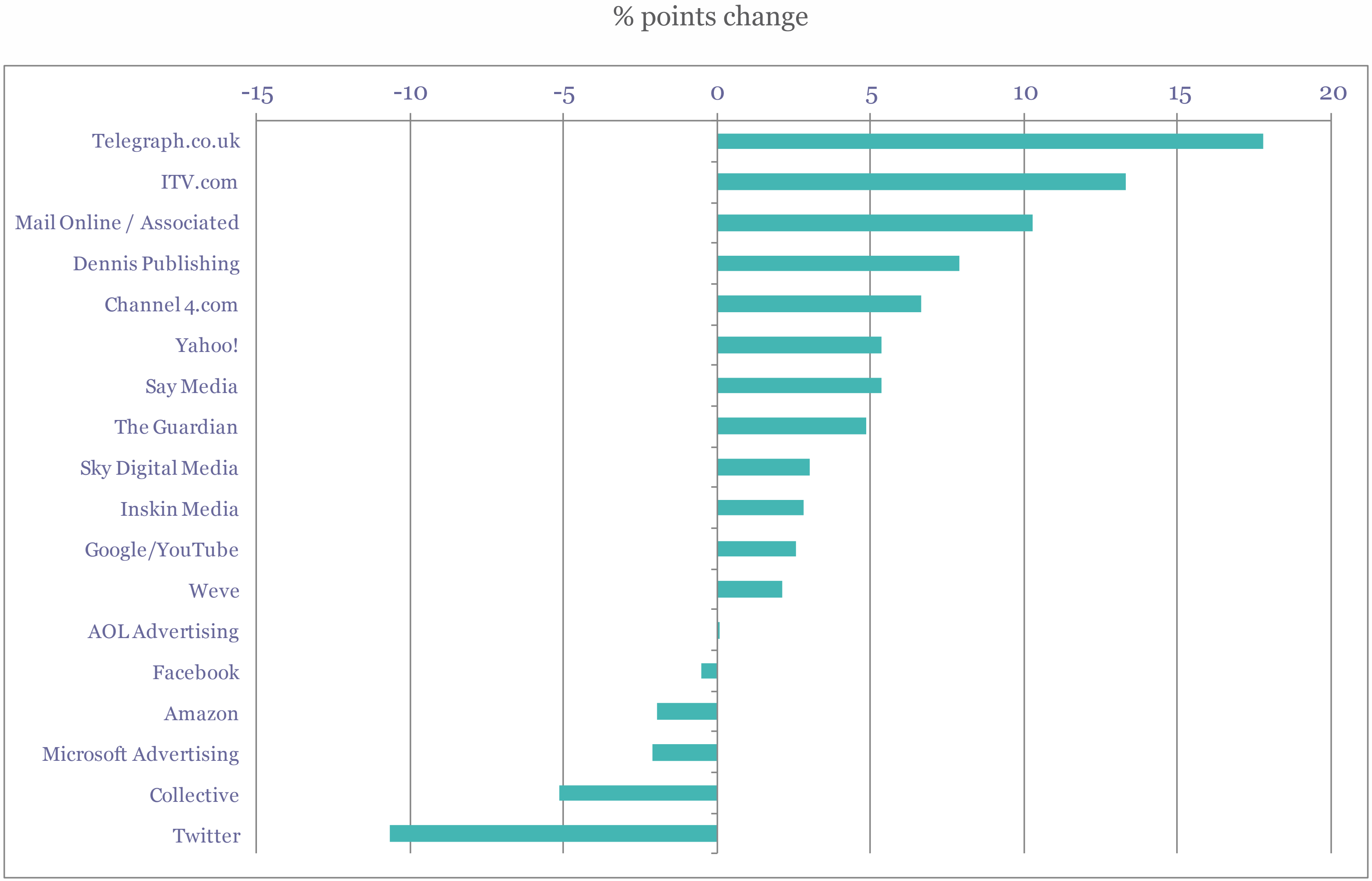

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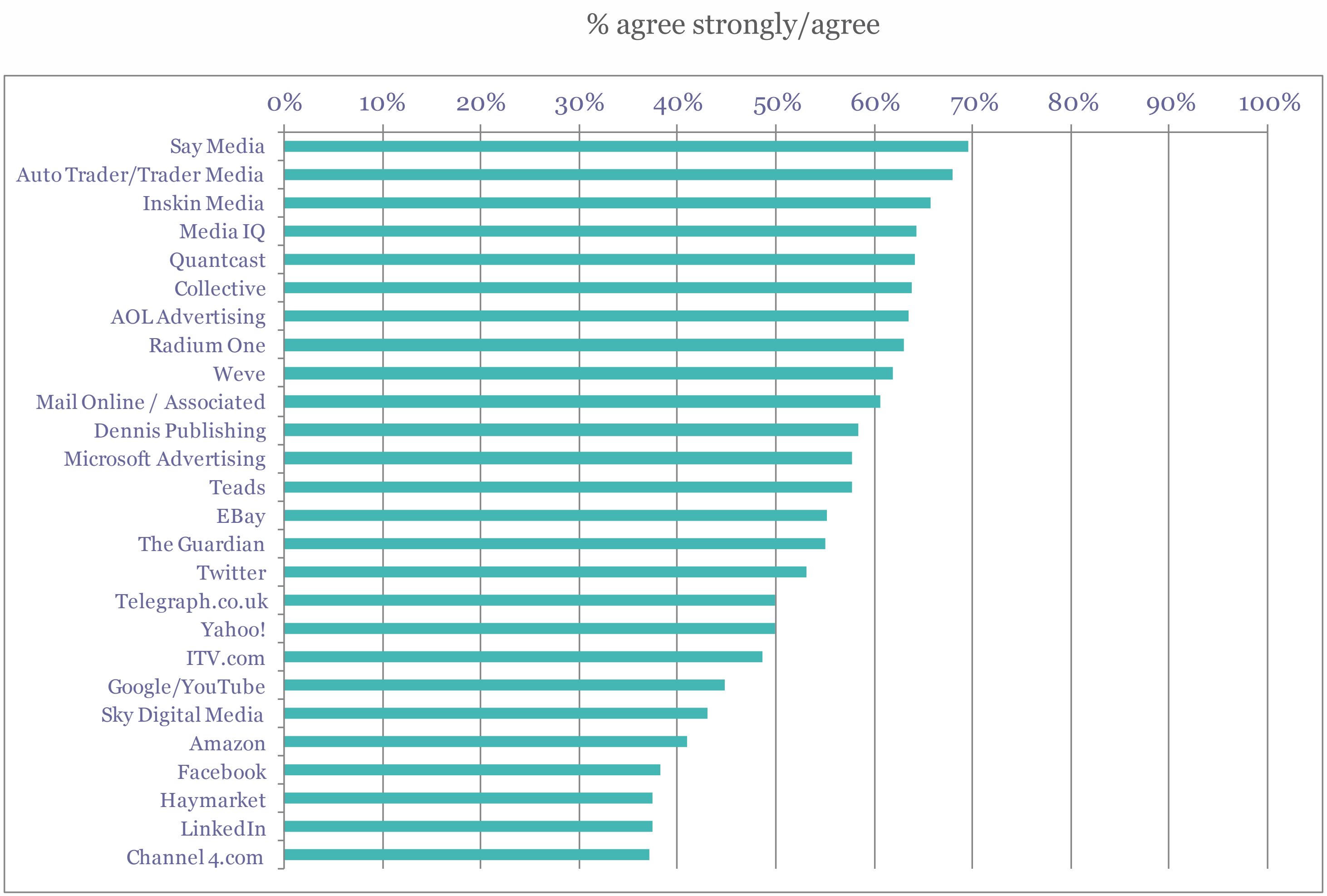
Spring 2015



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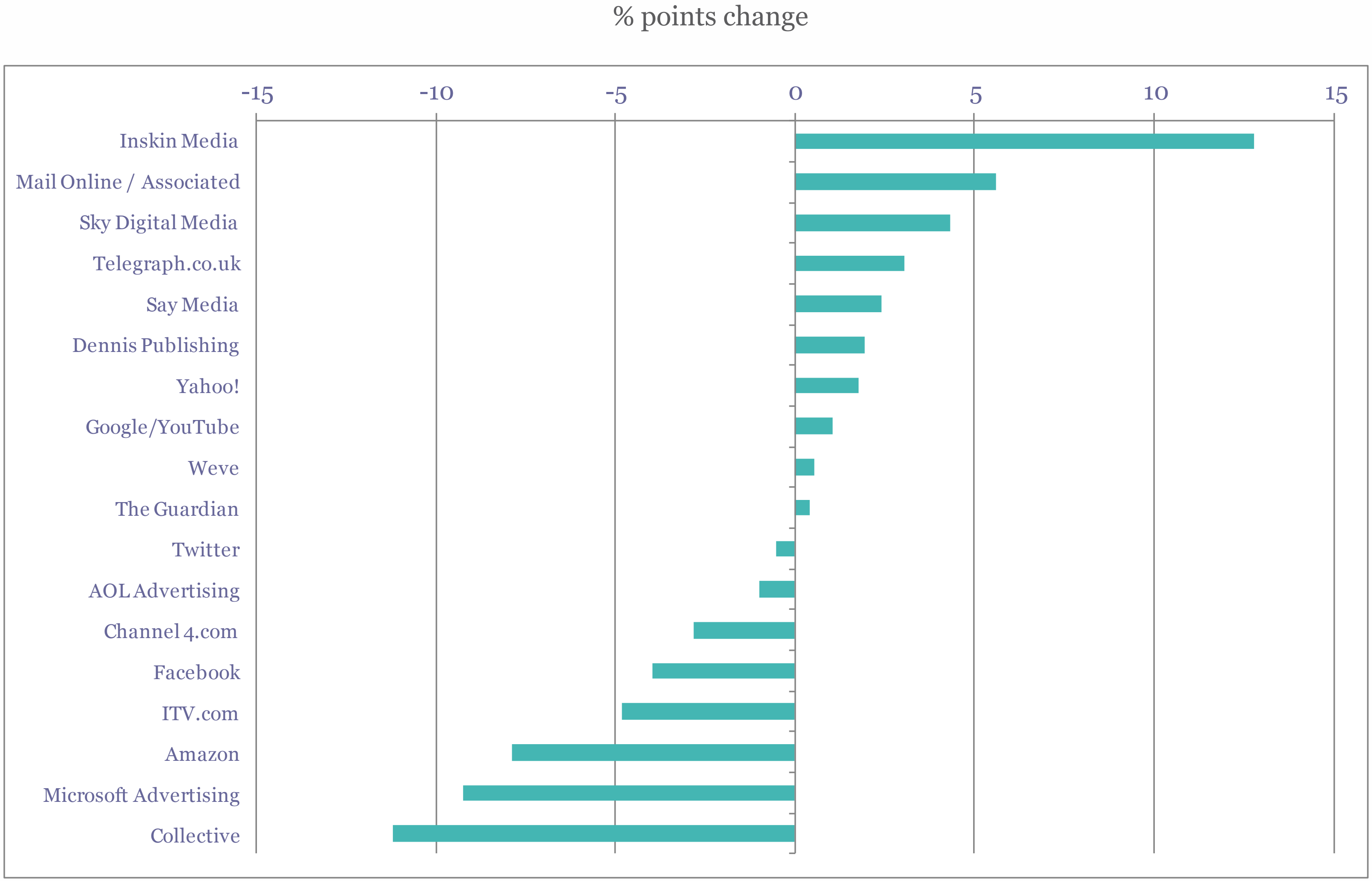
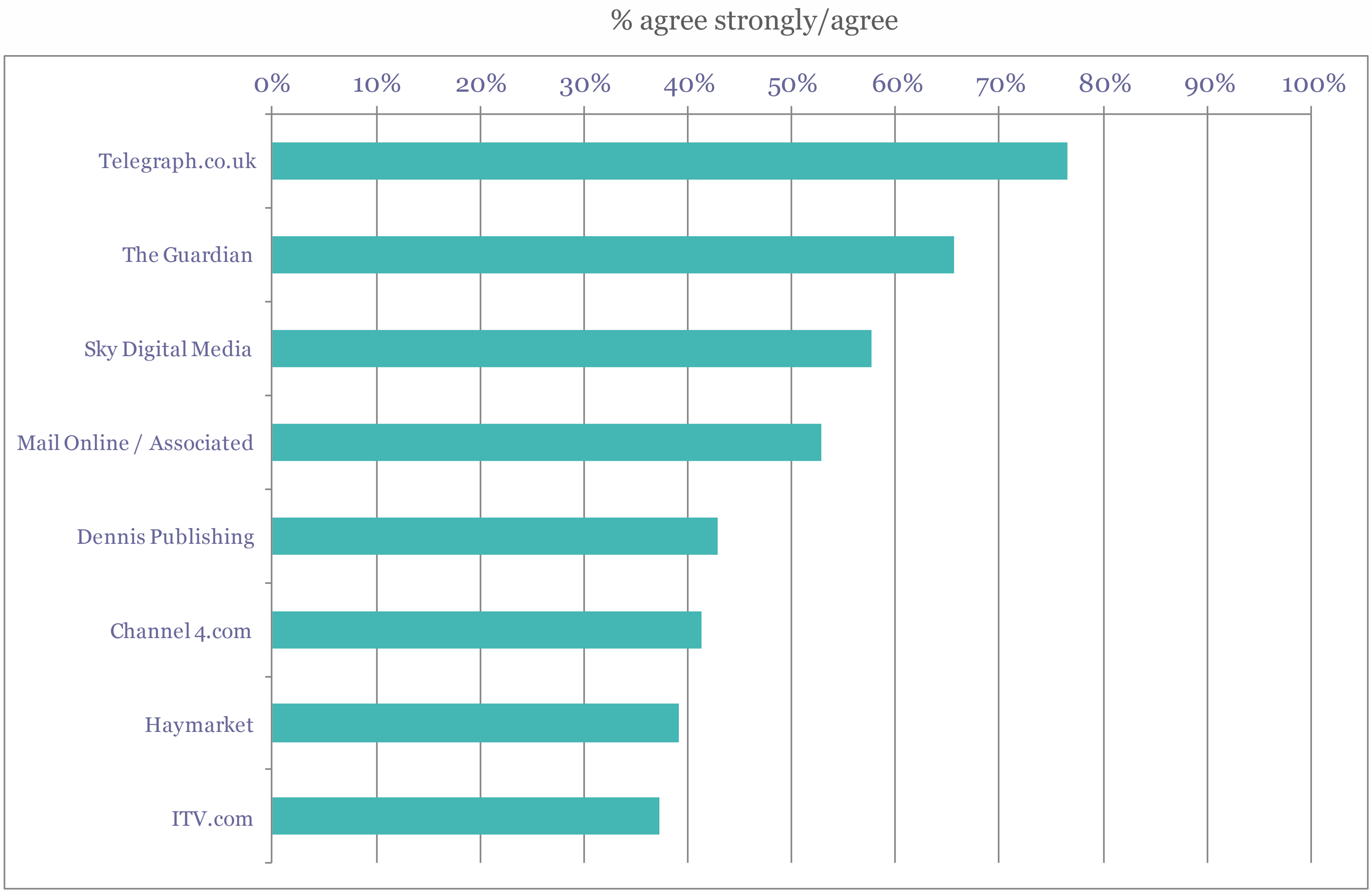


The media owner demonstrates a good understanding of how cross-media opportunities can be exploited
Spring 2015



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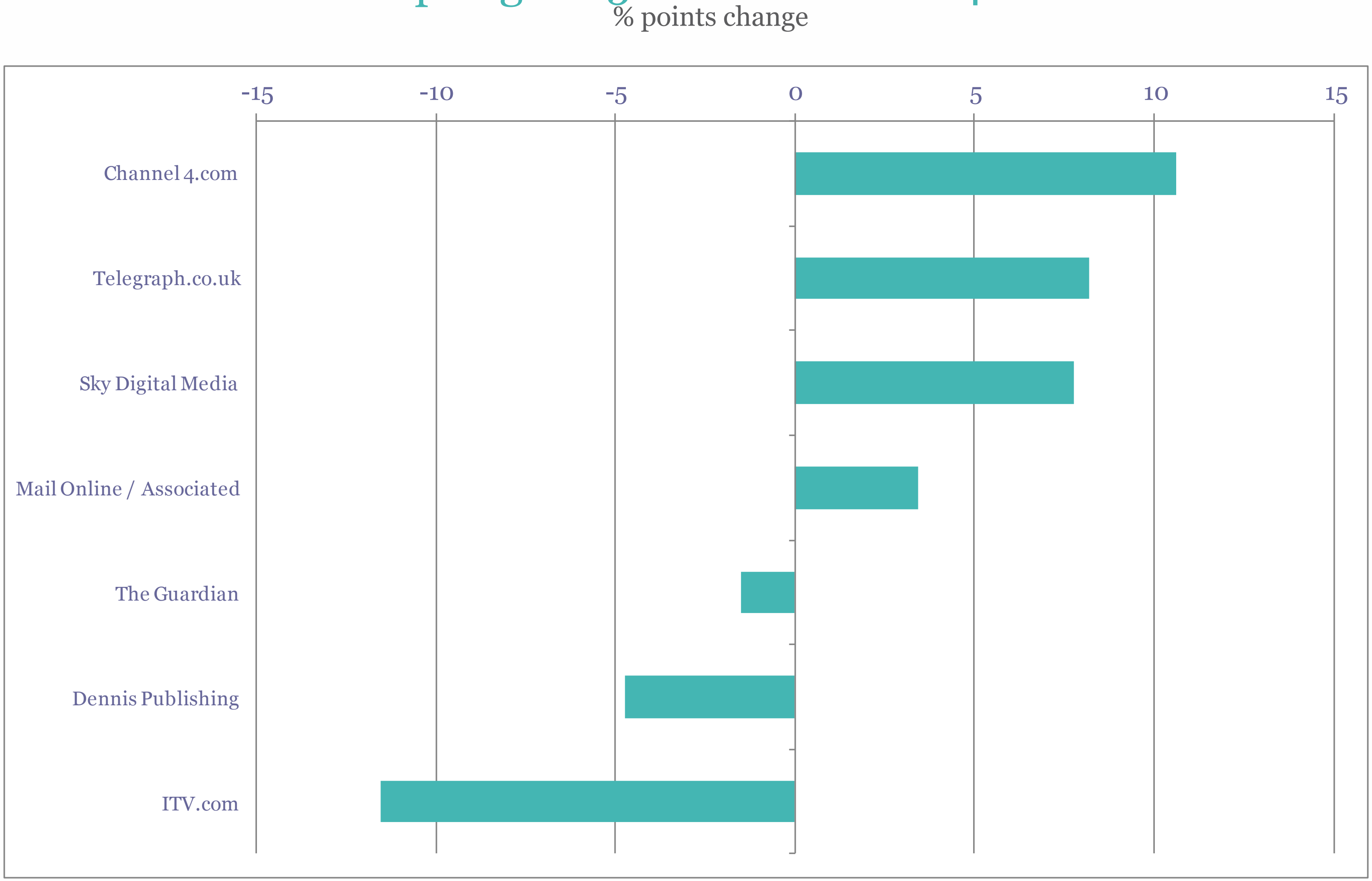
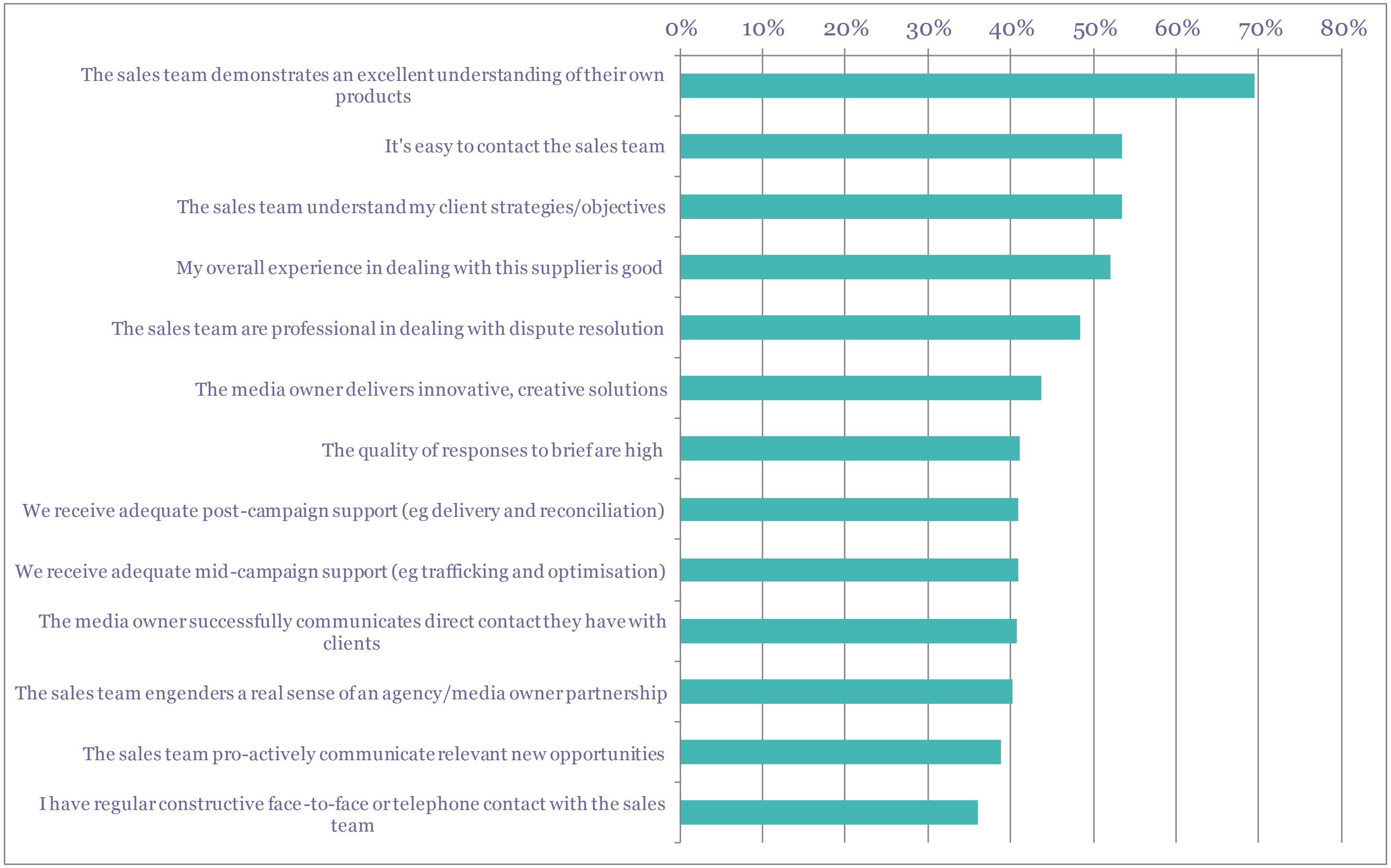
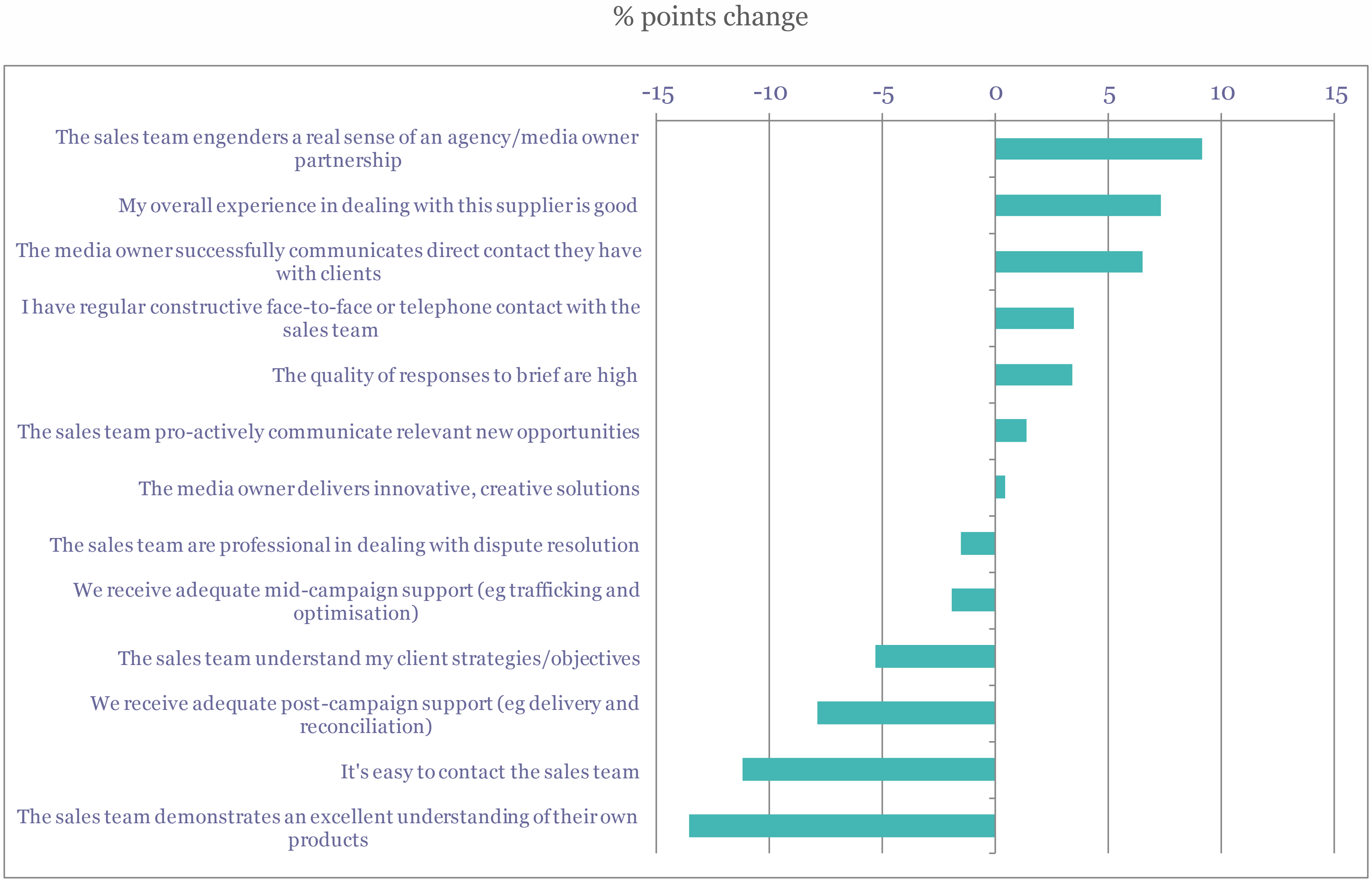


Amazon
Spring 2015

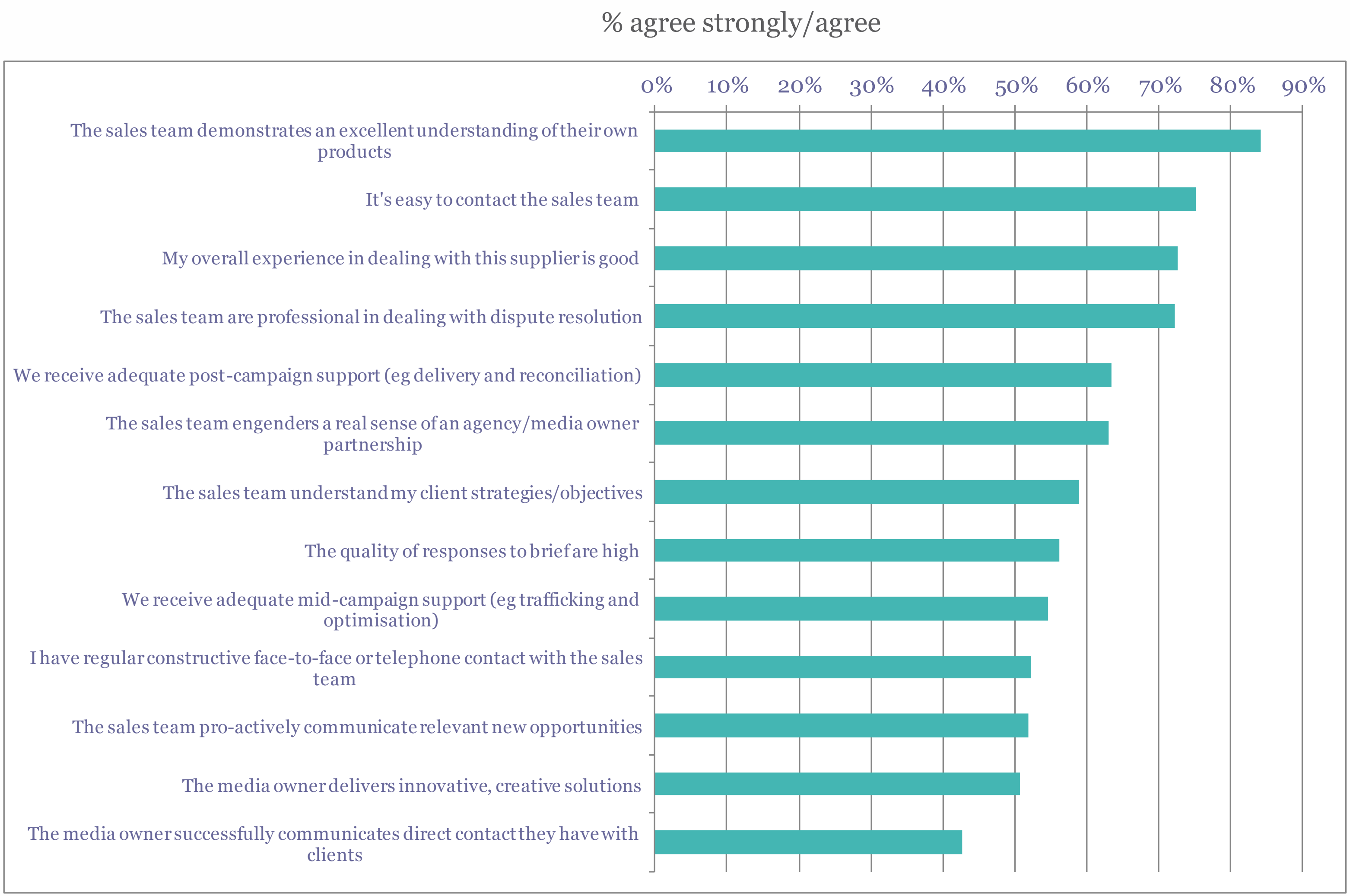
% agree strongly/agree



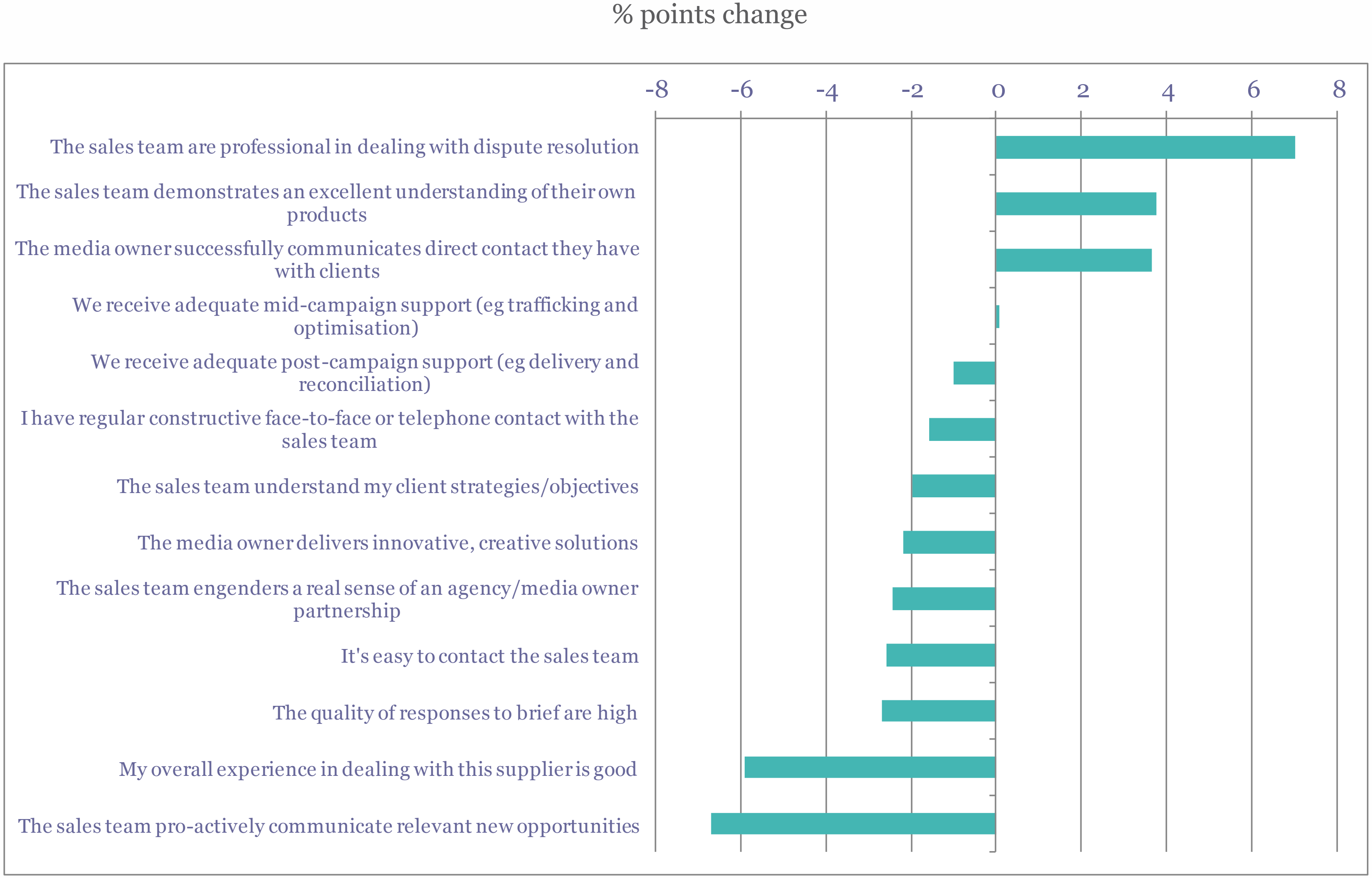
Amazon
Spring 2015 vs. Autumn 2014



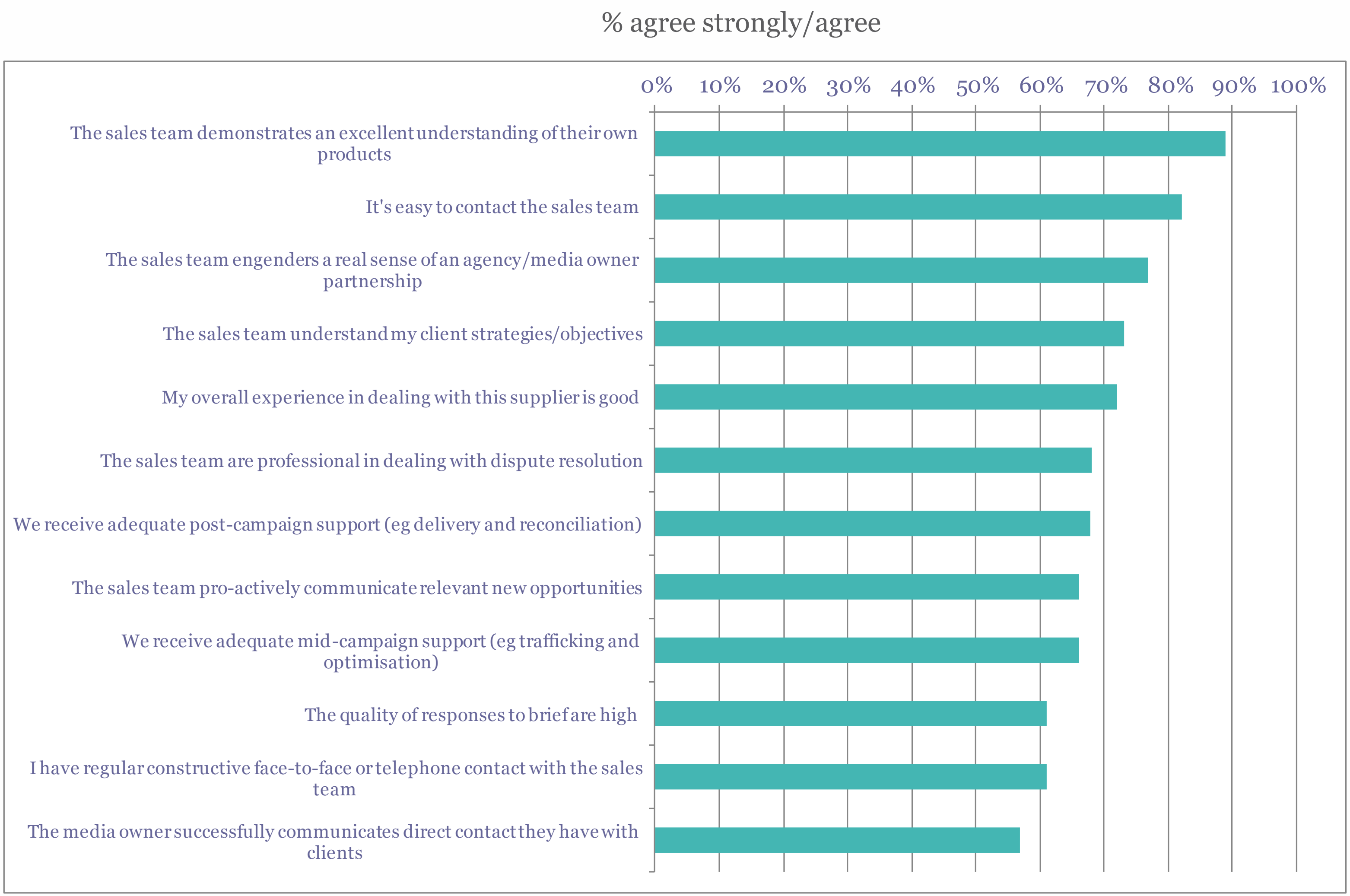
AOL Advertising
Spring 2015



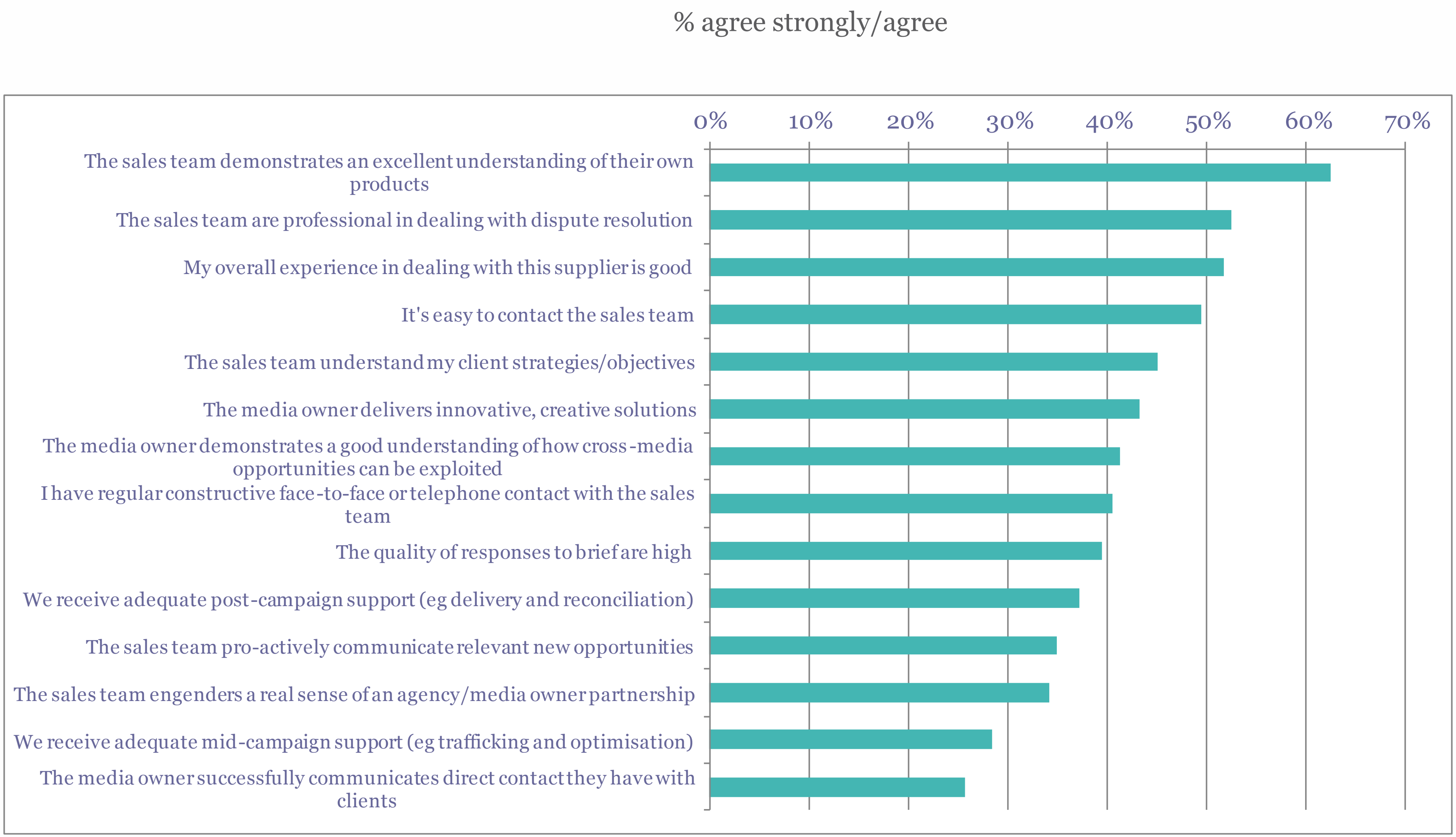
AOL Advertising
Spring 2015 vs. Autumn 2014



Auto Trader/Trader Media
Spring 2015

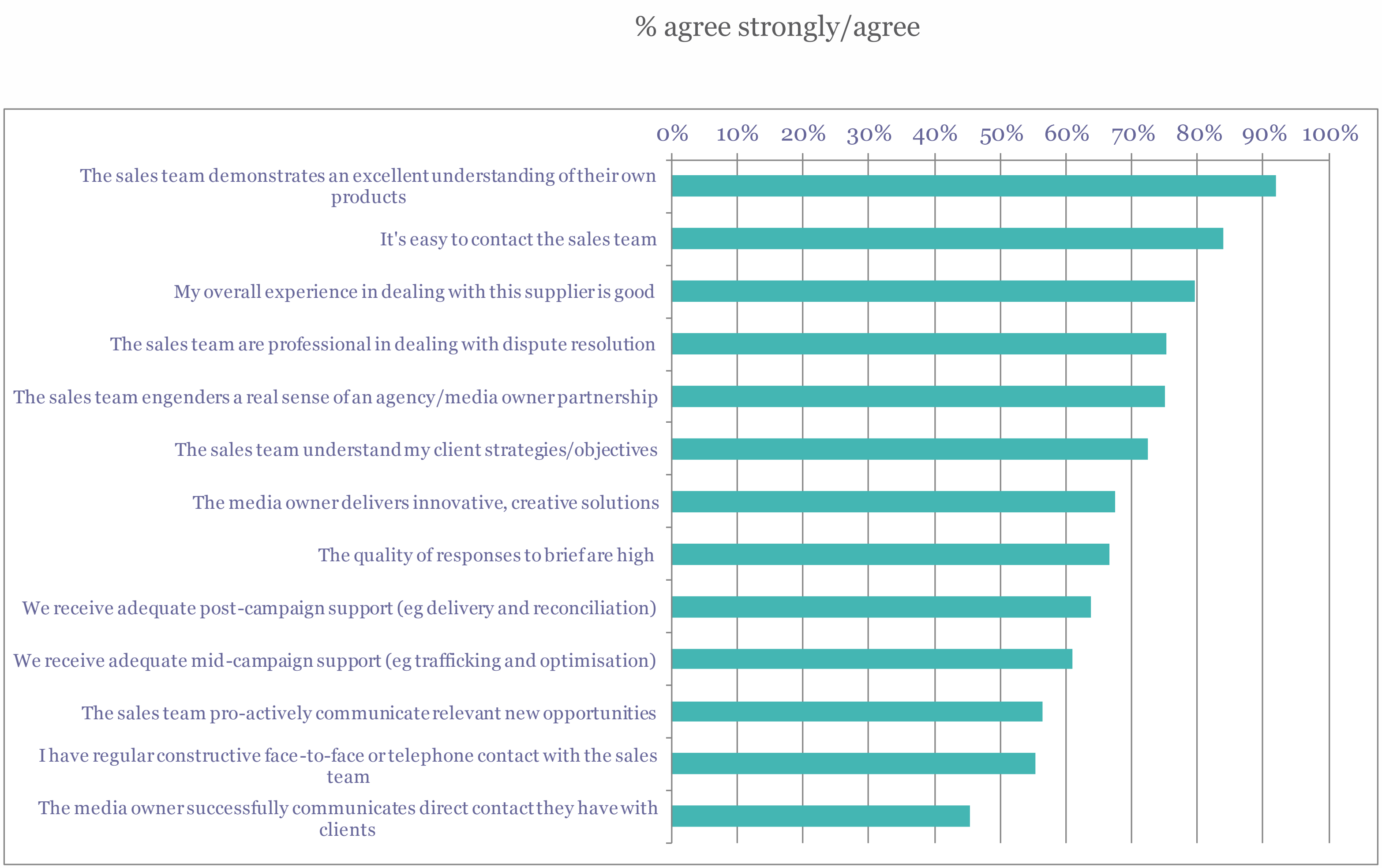


Channel 4.com
Spring 2015

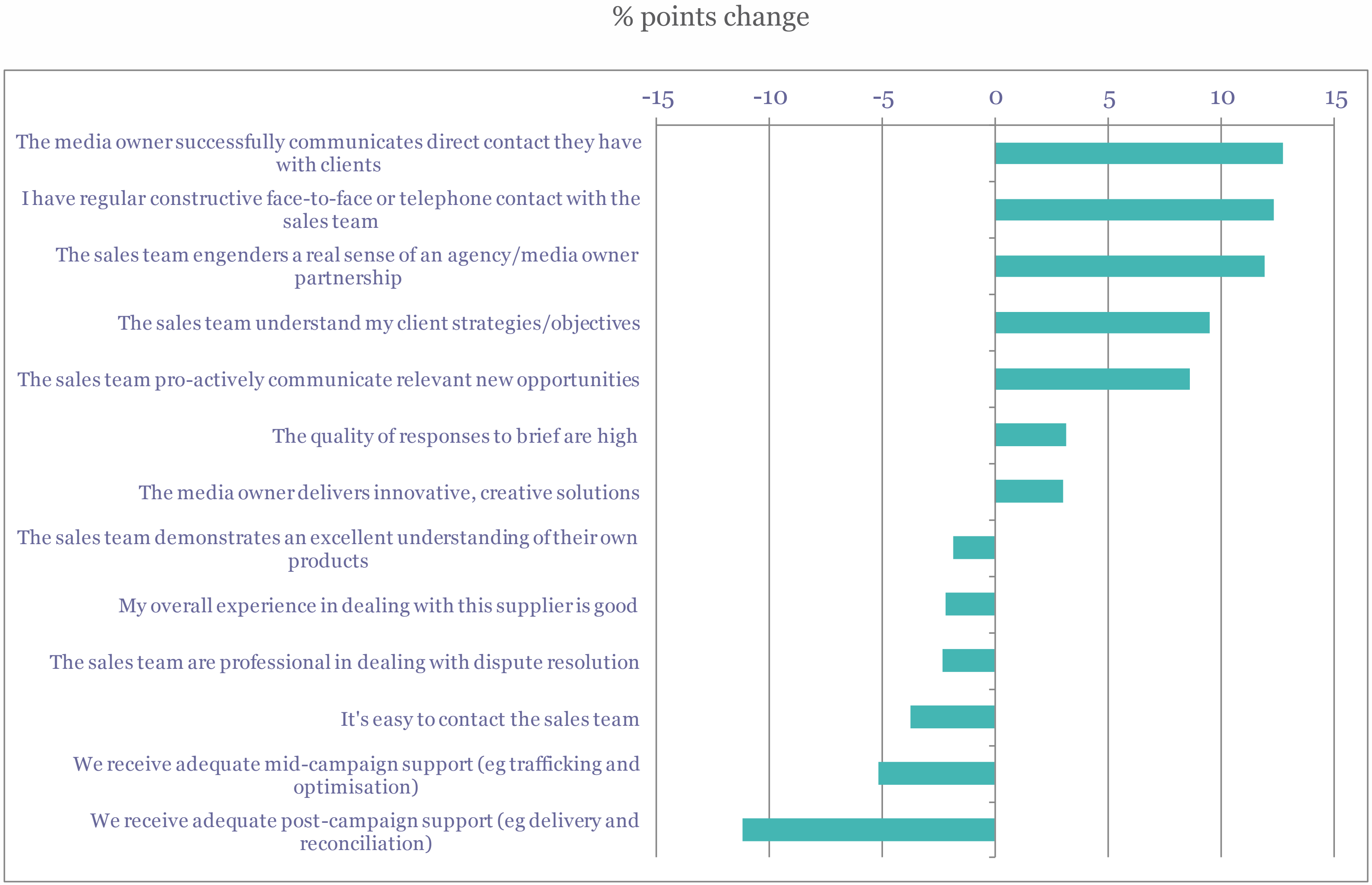


Channel 4.com
Spring 2015 vs. Autumn 2014

Collective
Spring 2015

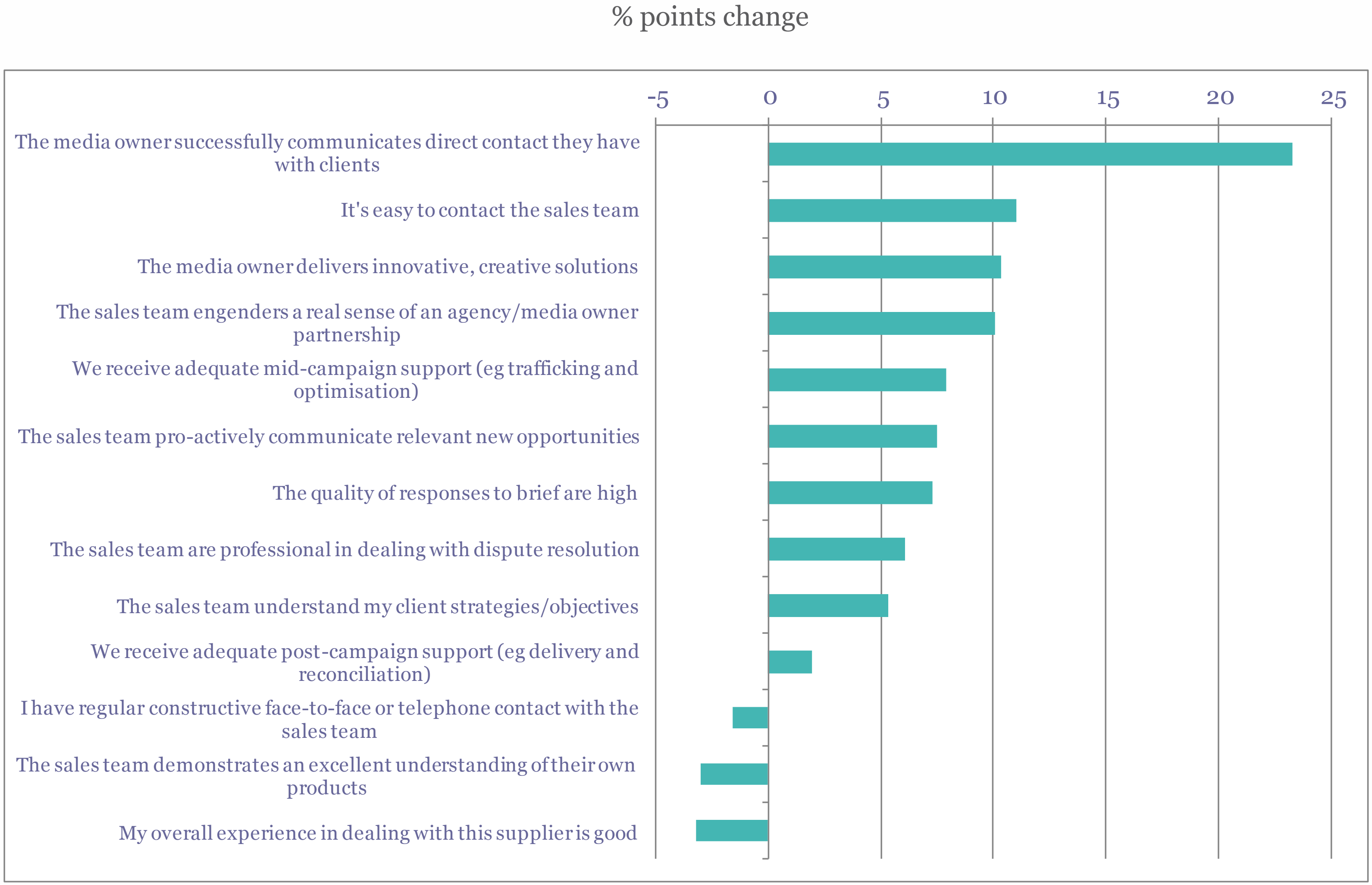


Collective
Spring 2015 vs. Autumn 2014

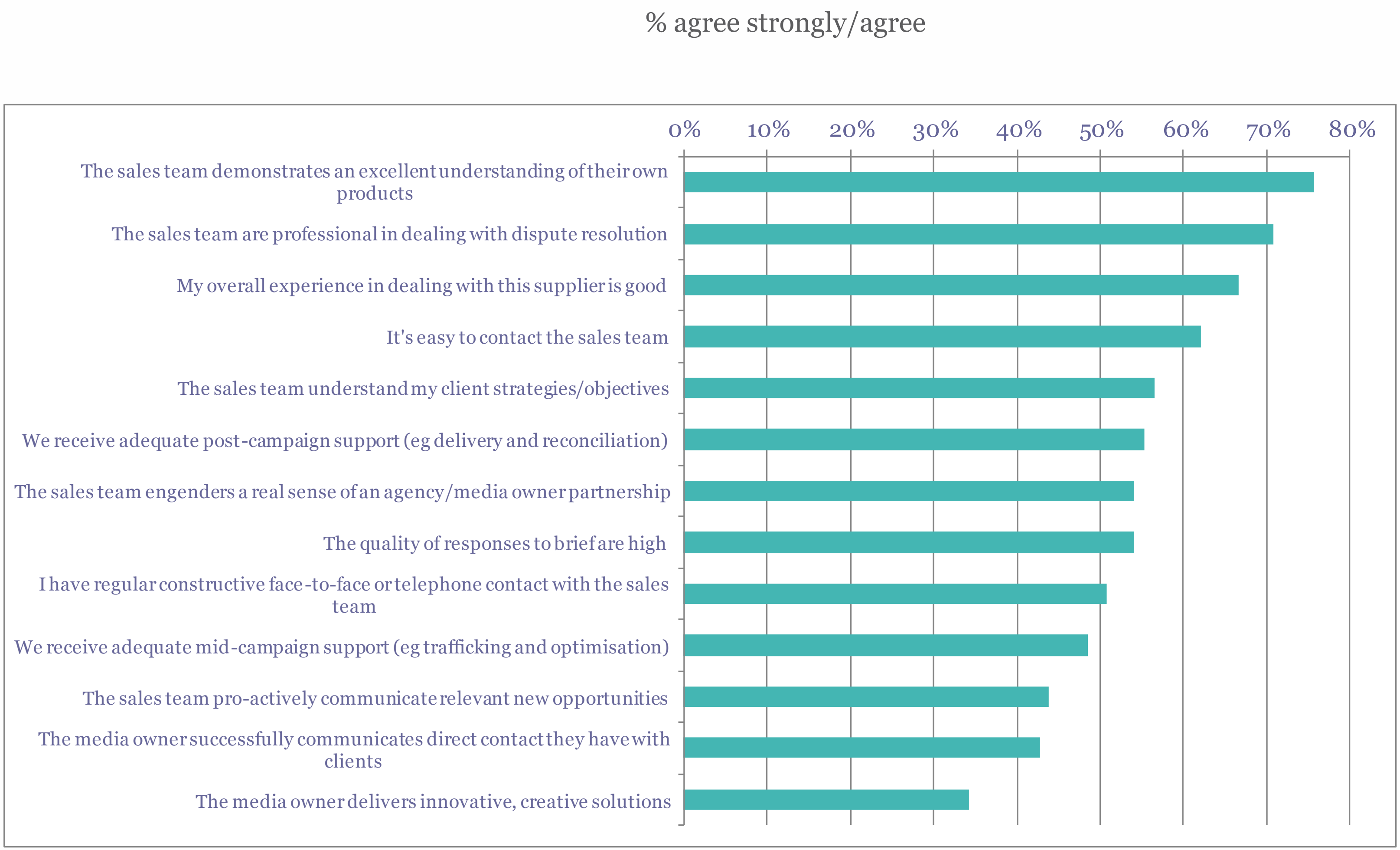


Dennis Publishing
Spring 2015

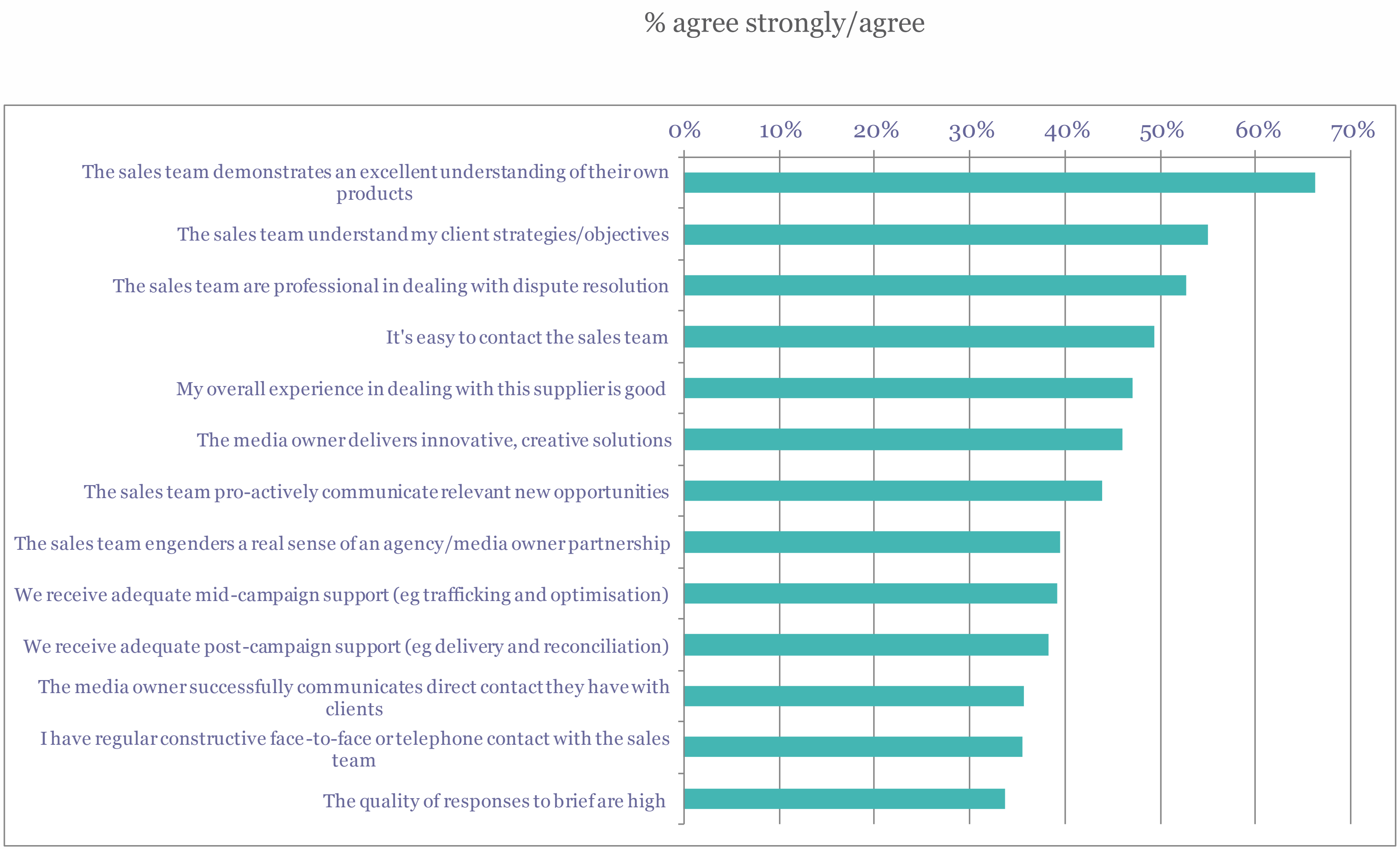
Dennis Publishing
Spring 2015 vs. Autumn 2014



Ebay
Spring 2015

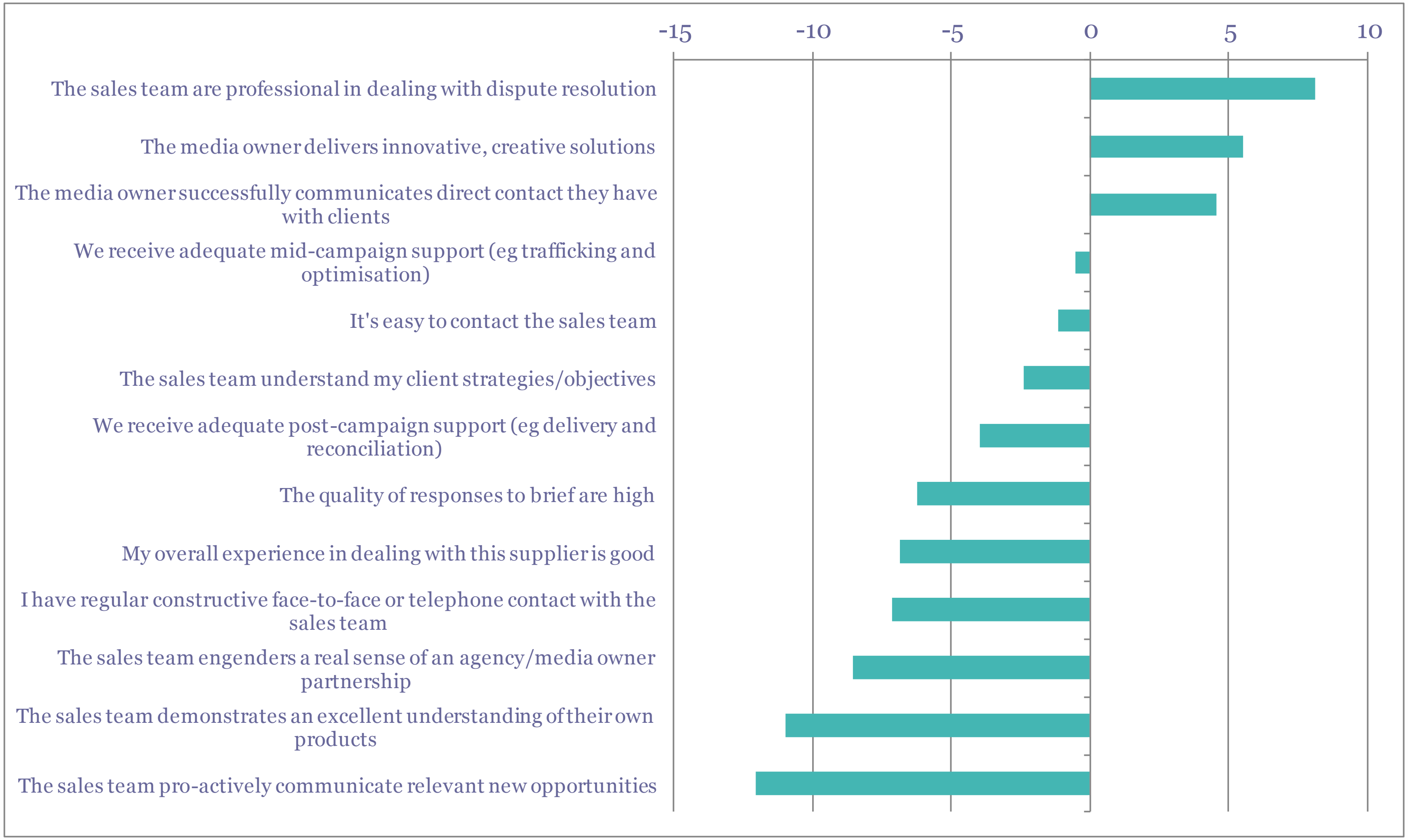


Facebook
Spring 2015



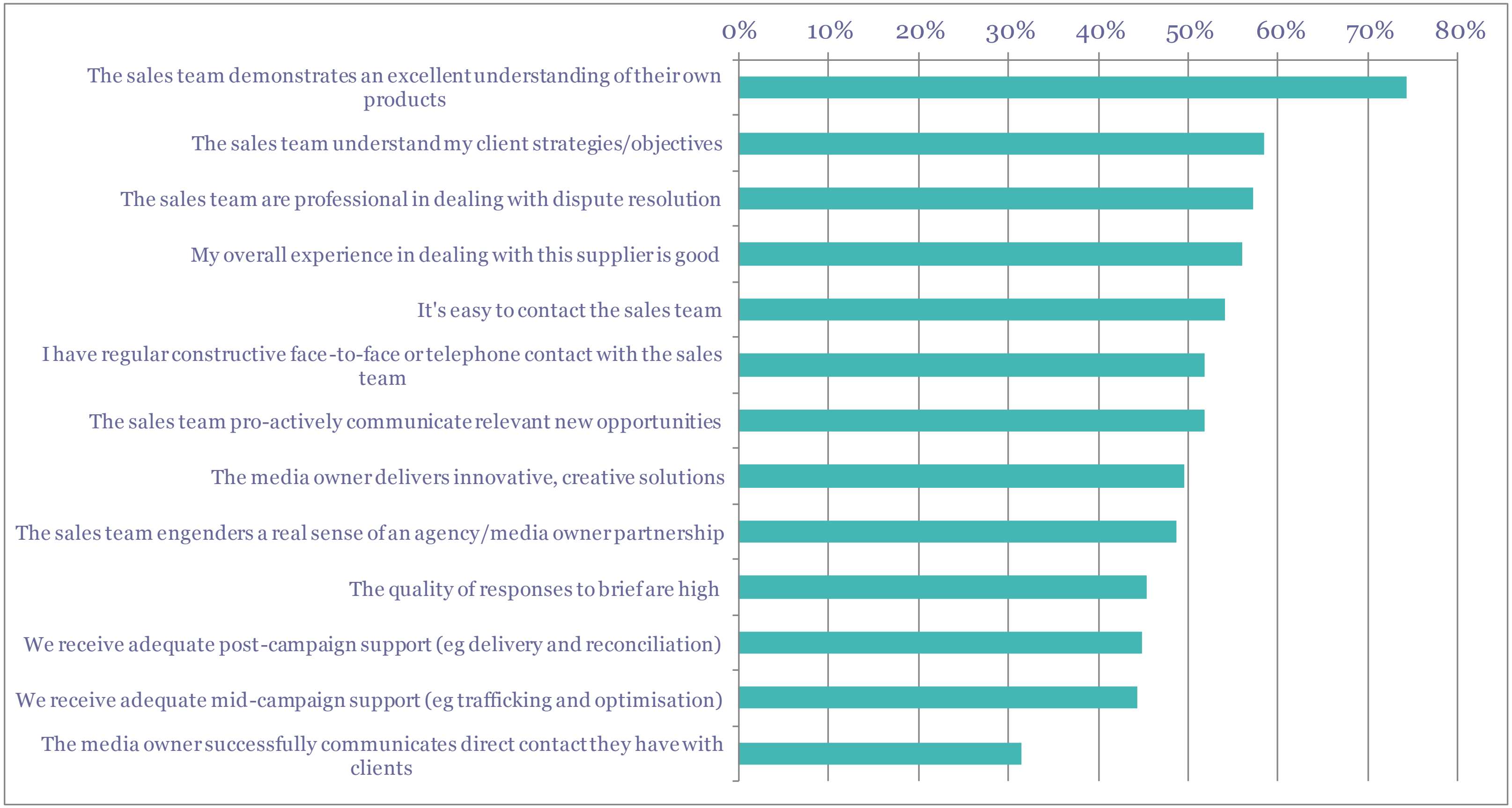
Facebook
Spring 2015 vs. Autumn 2014

% points change

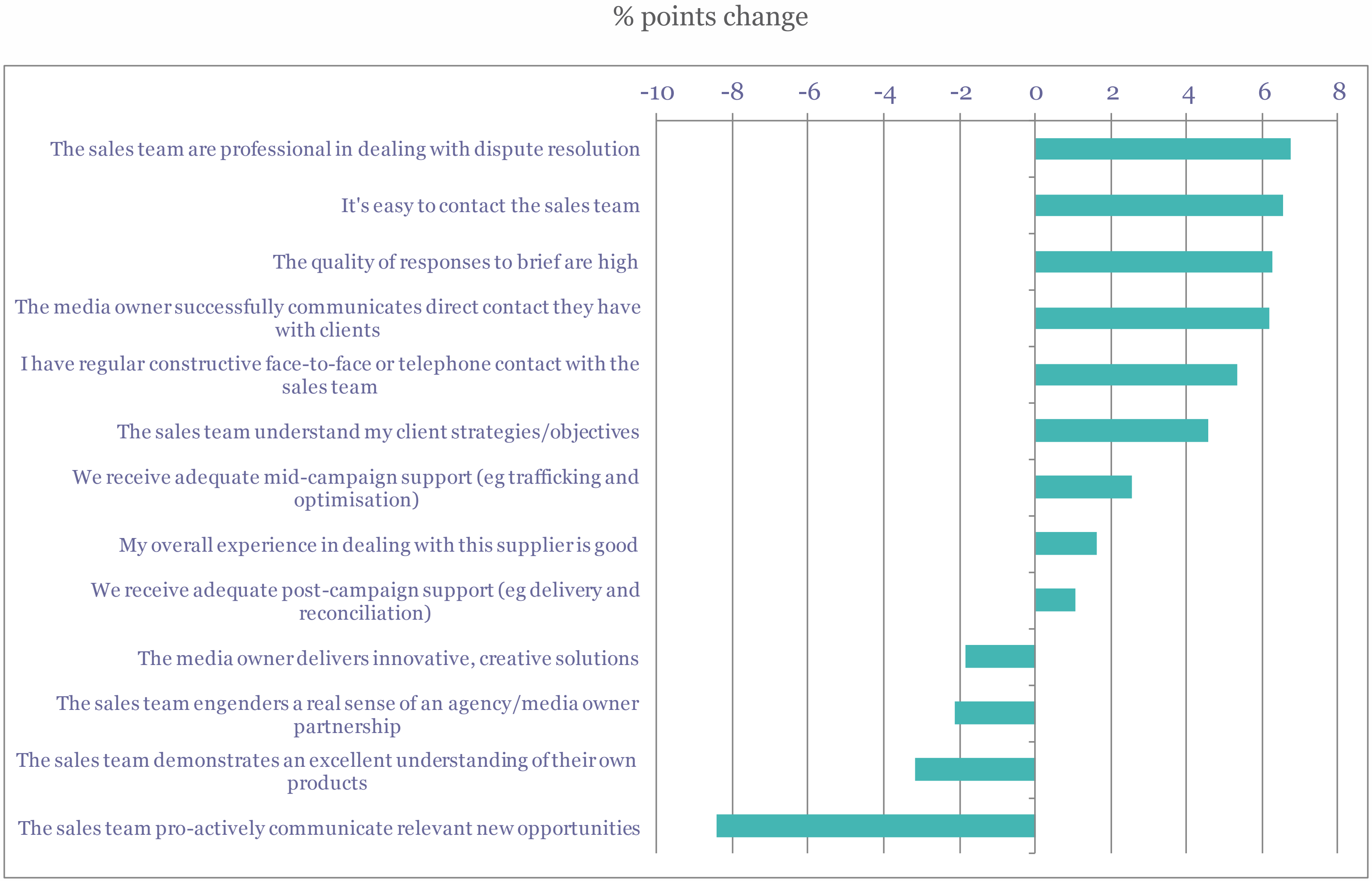


Google(Display)/YouTube
Spring 2015

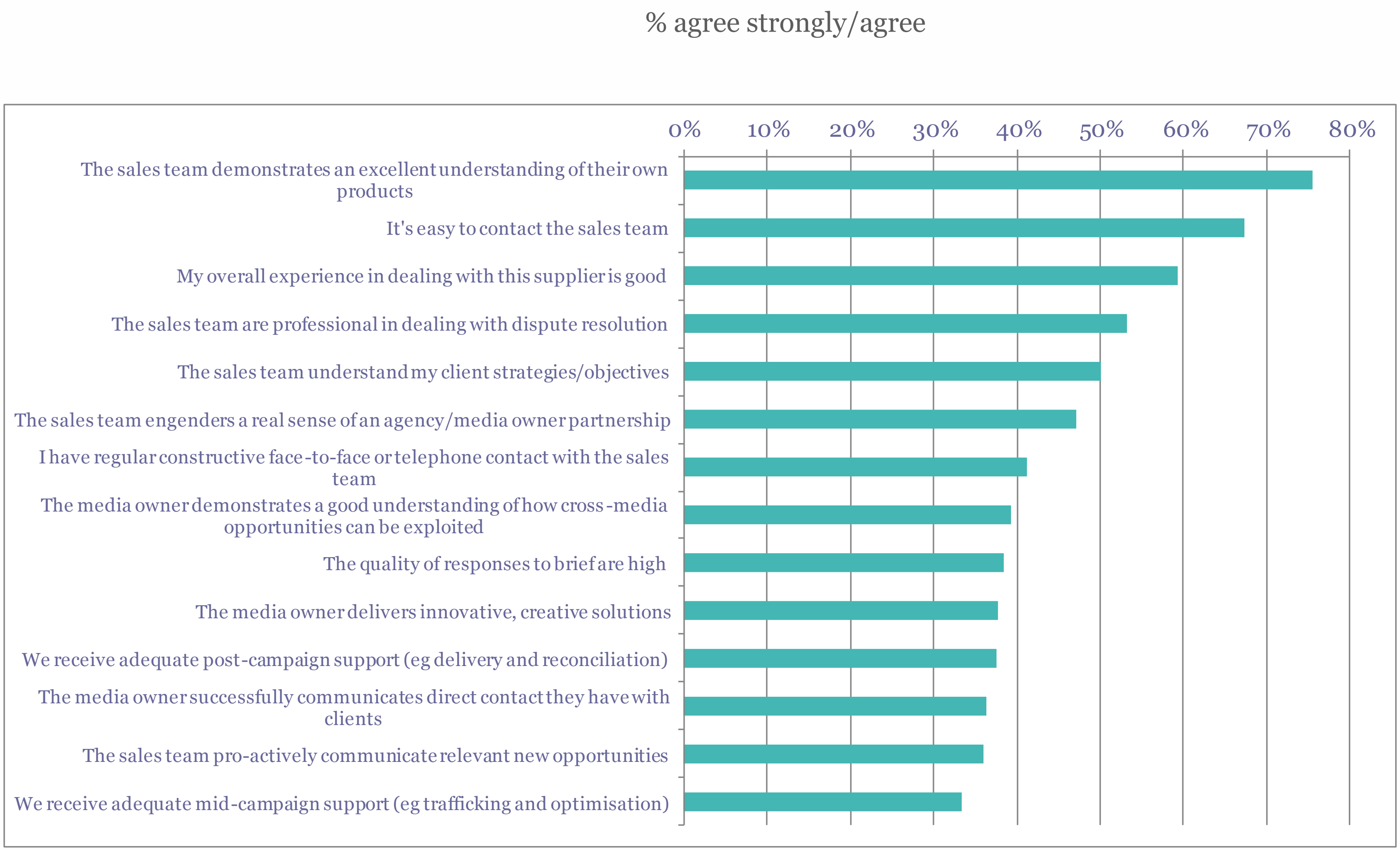
% agree strongly/agree



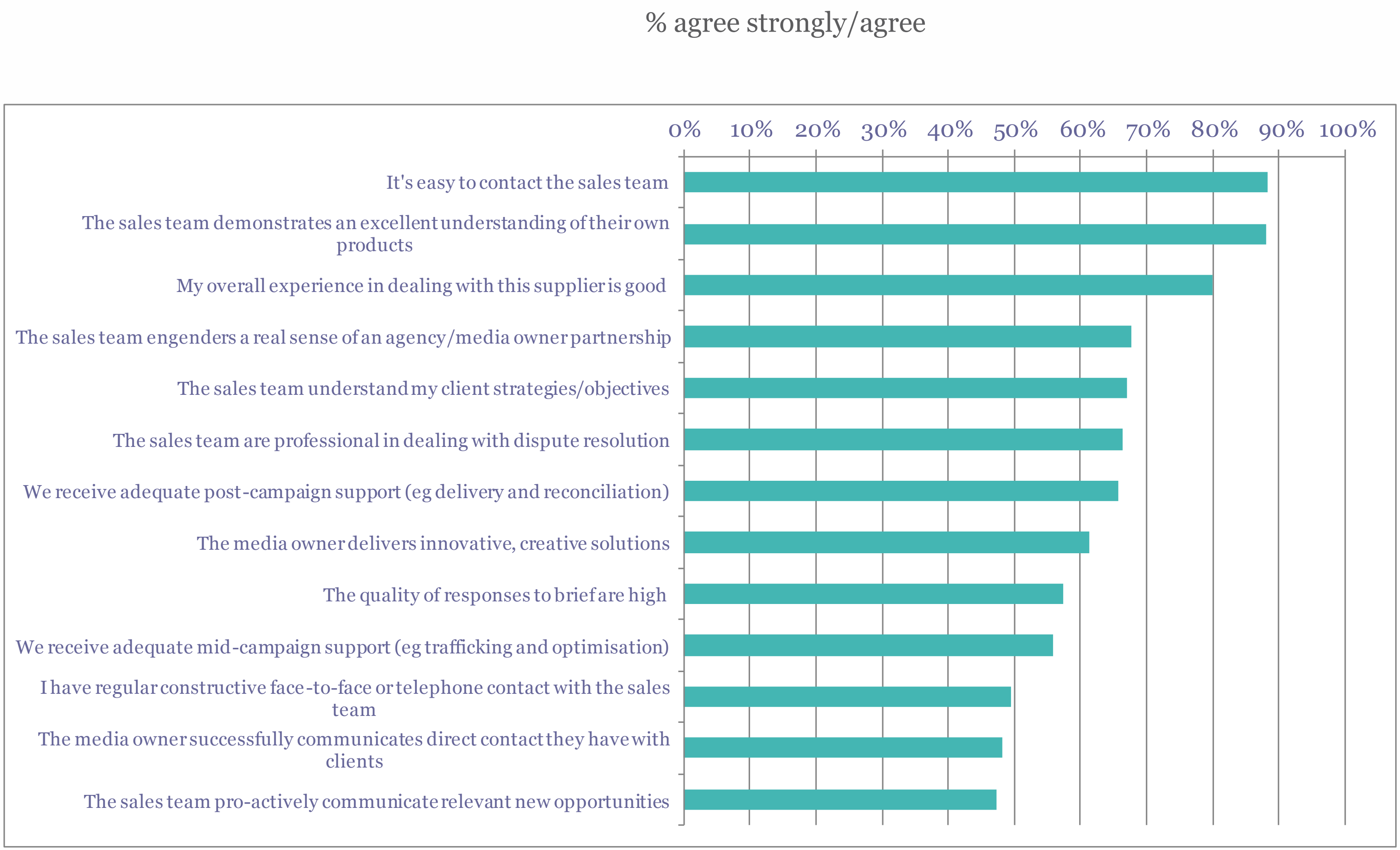
Google(Display)/YouTube
Spring 2015 vs. Autumn 2014



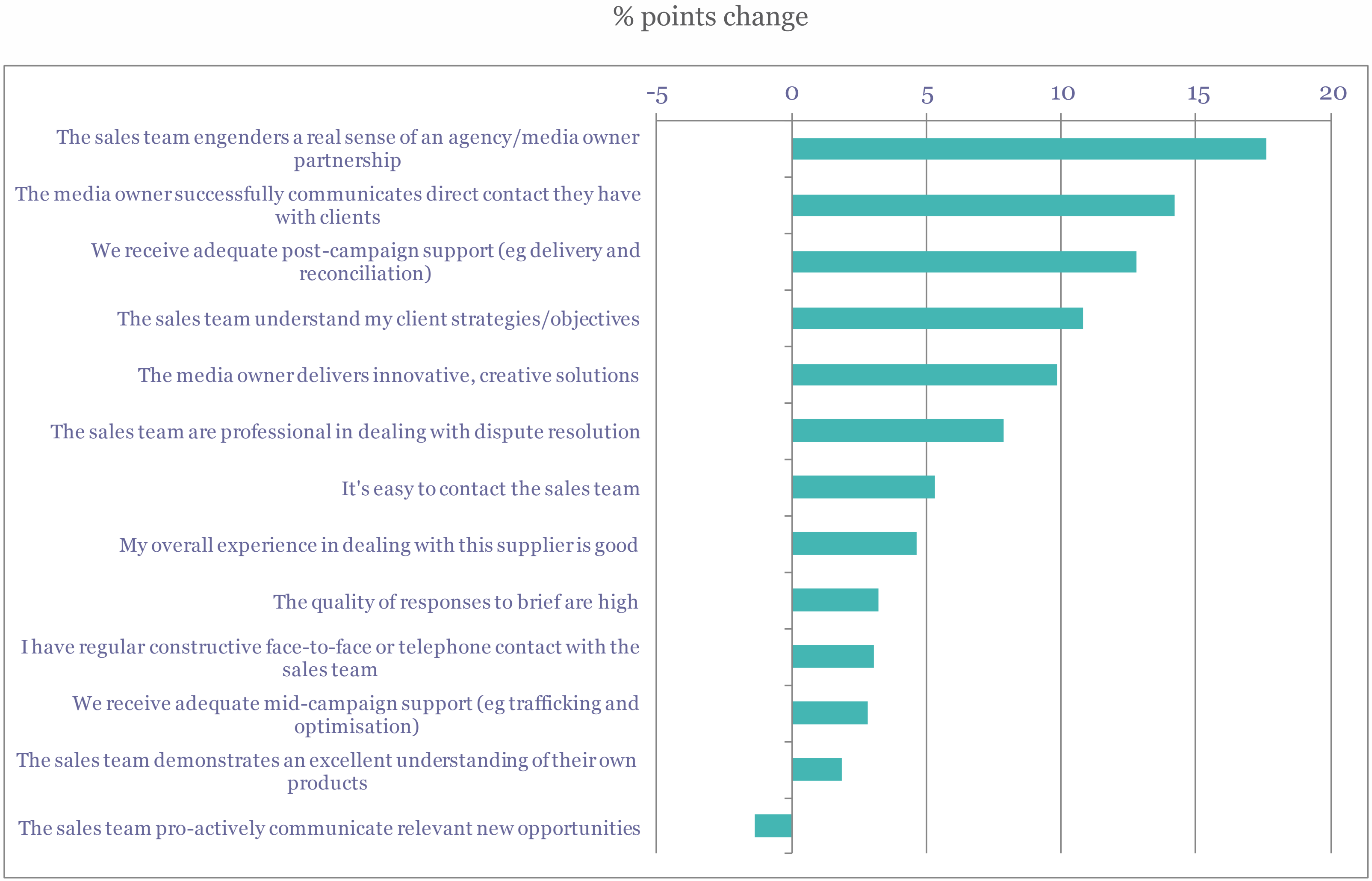
Haymarket
Spring 2015



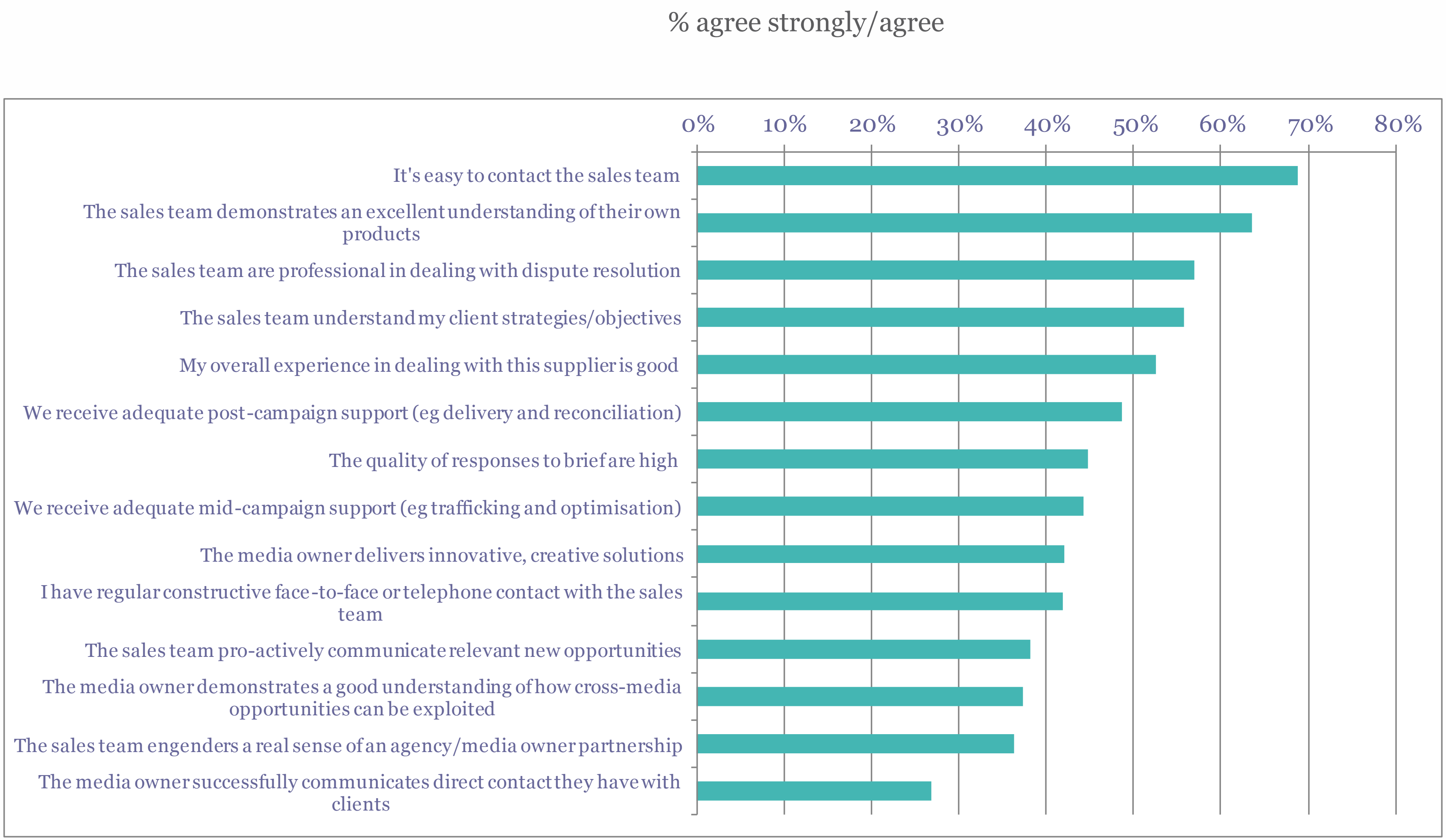
Inskin Media
Spring 2015



Inskin Media
Spring 2015 vs. Autumn 2014



ITV.com
Autumn 2014



ITV.com
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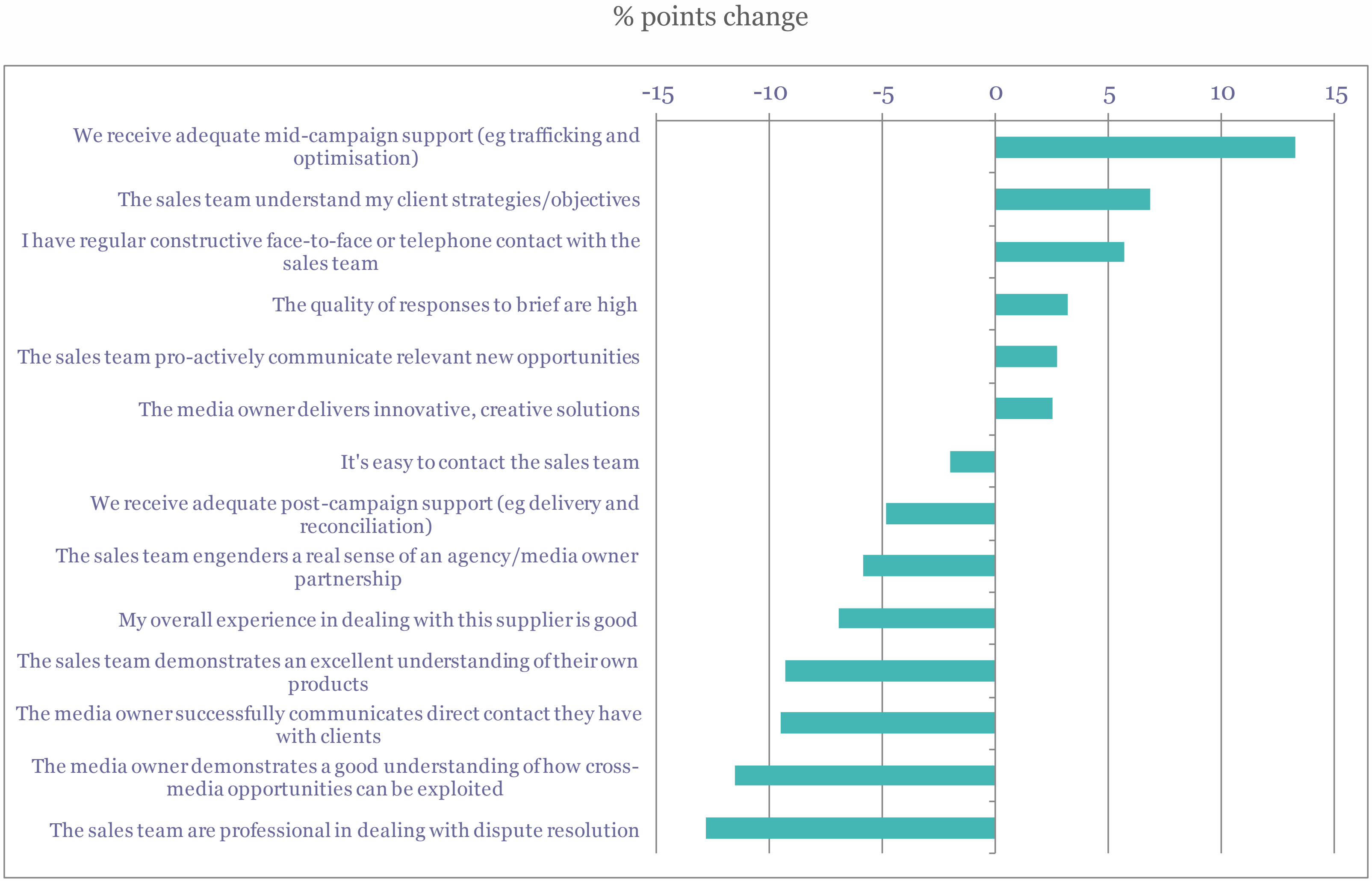
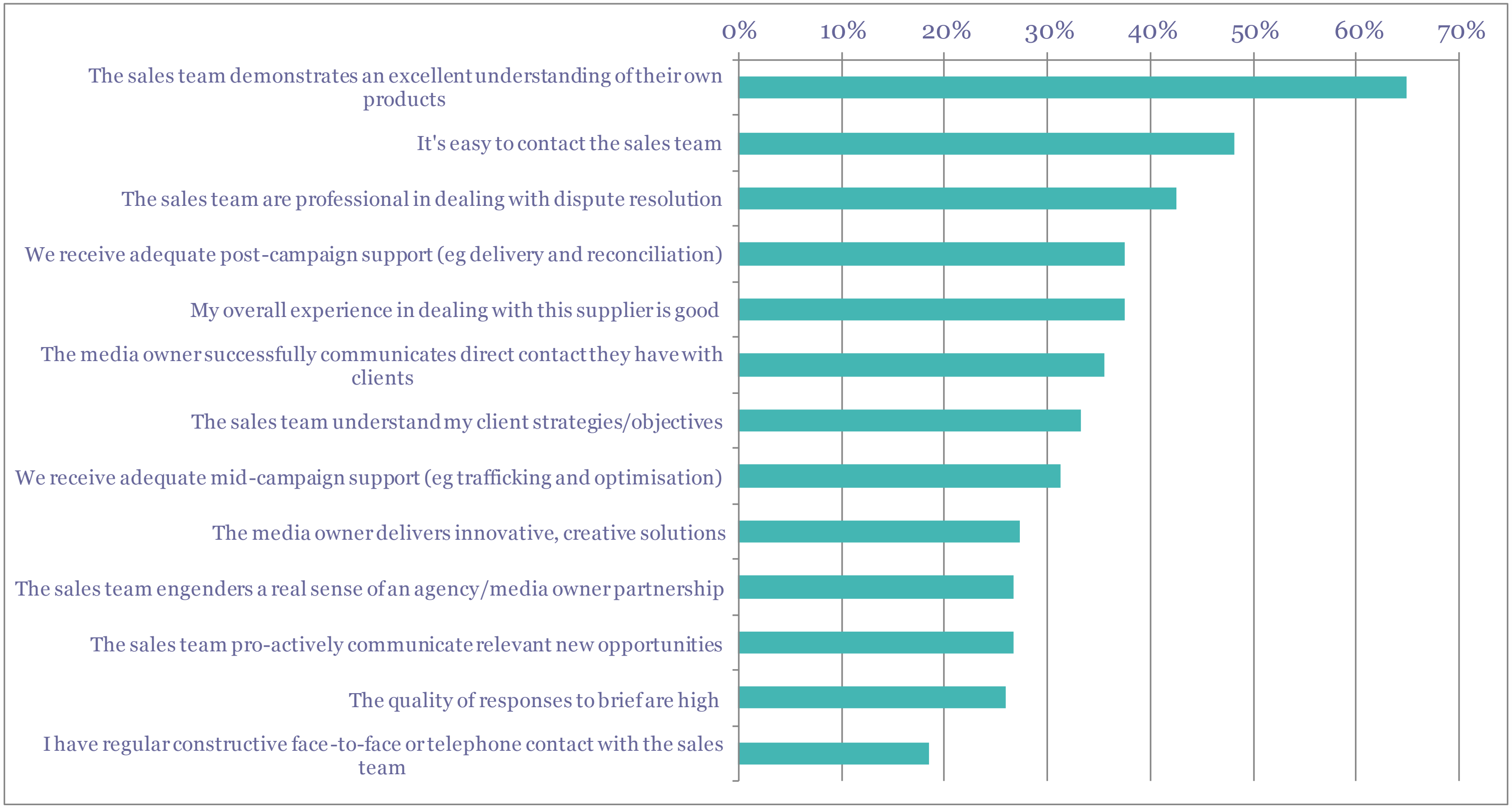
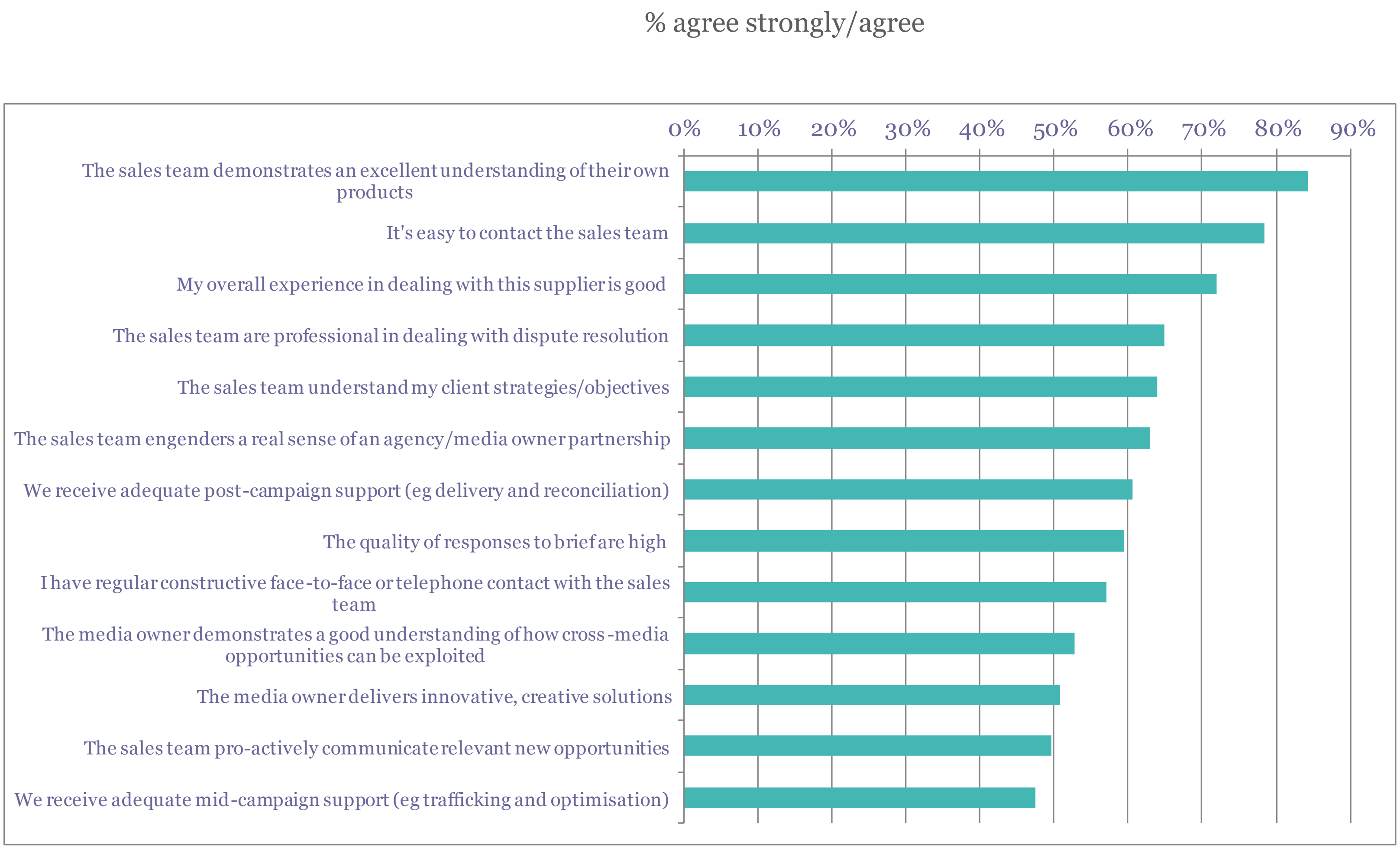


LinkedIn
Spring 2015

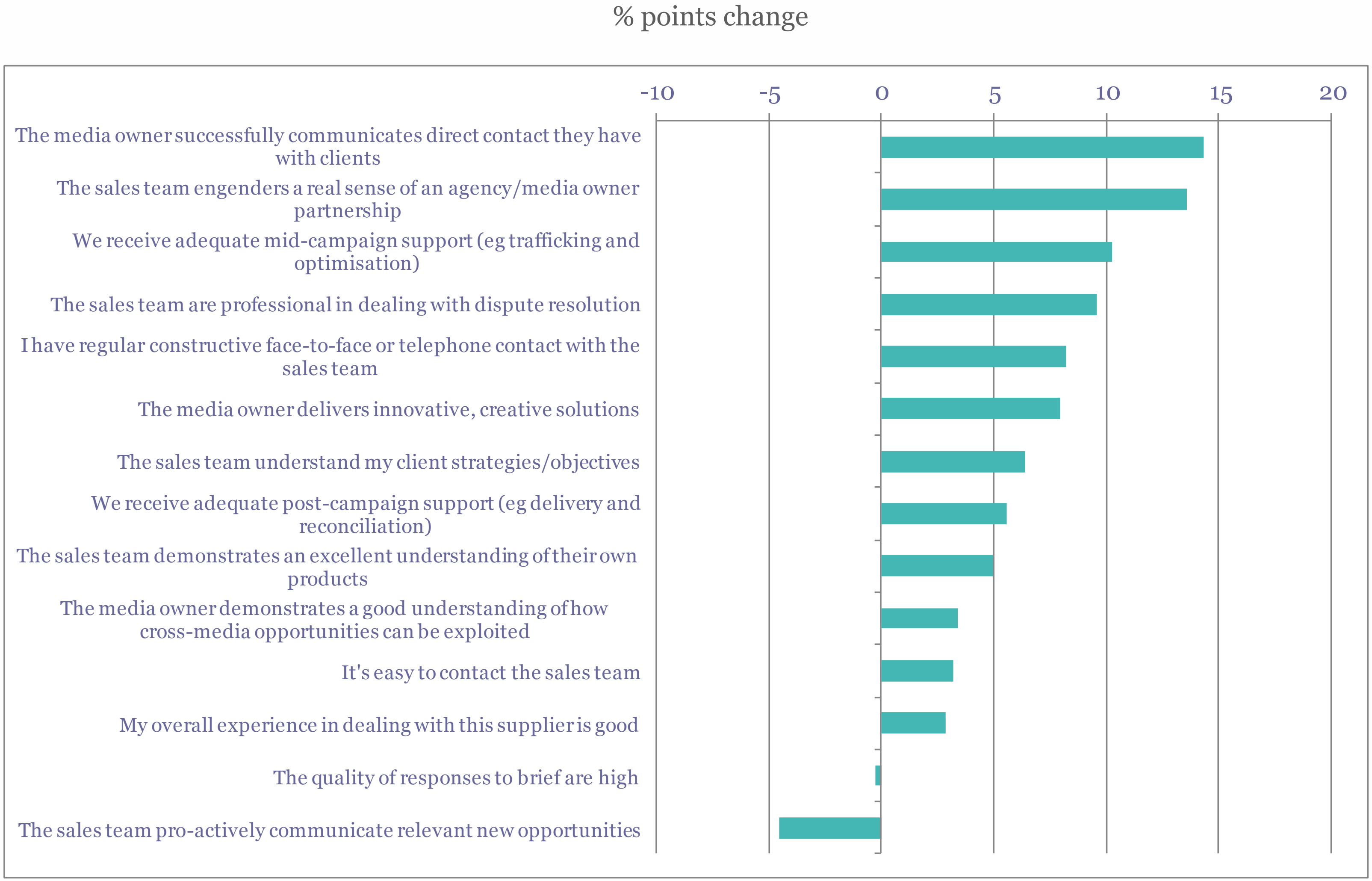
% agree strongly/agree



MailOnline/Associated
Spring 2015

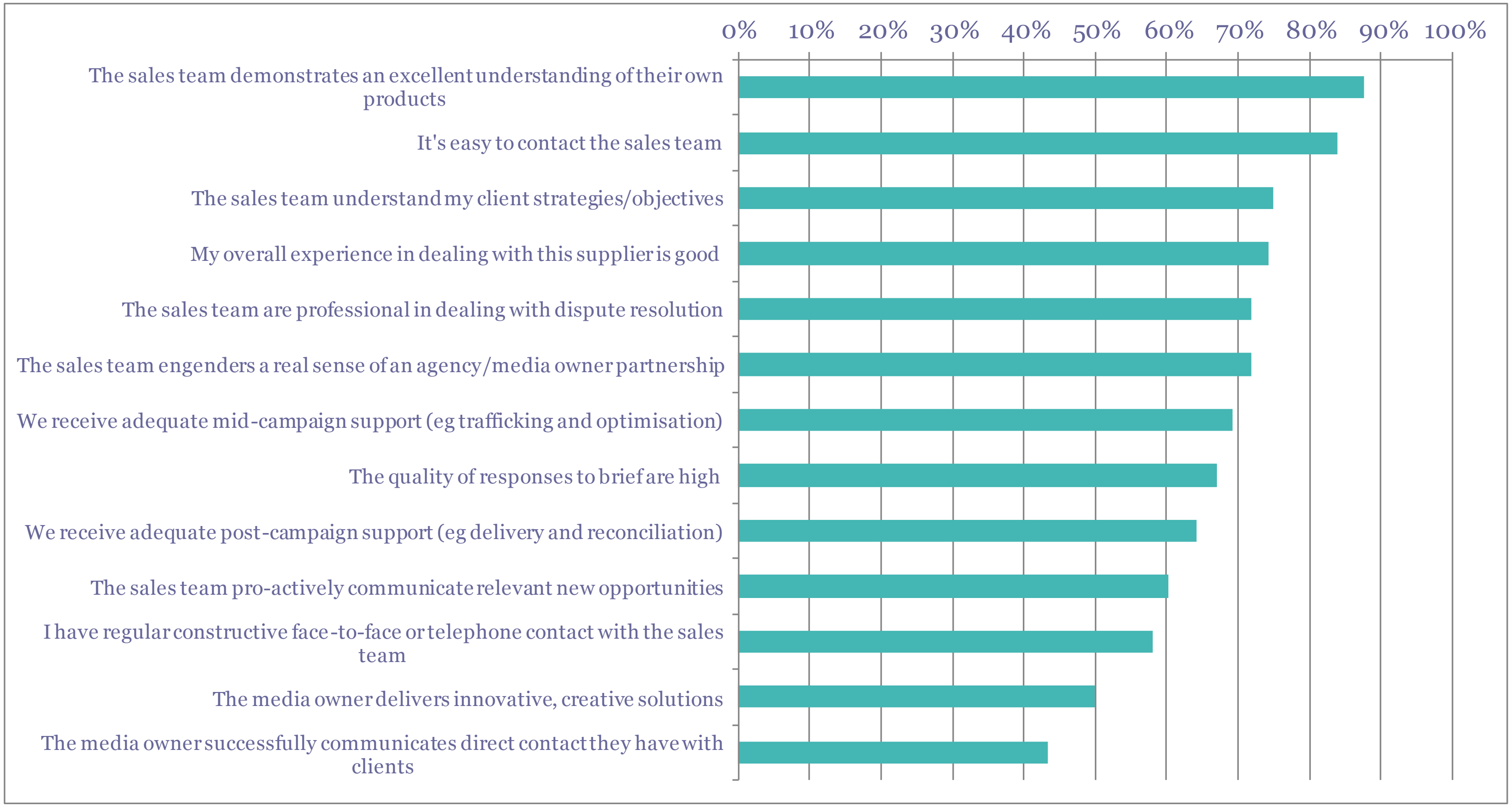


MailOnline/Associated
Spring 2015 vs. Autumn 2014

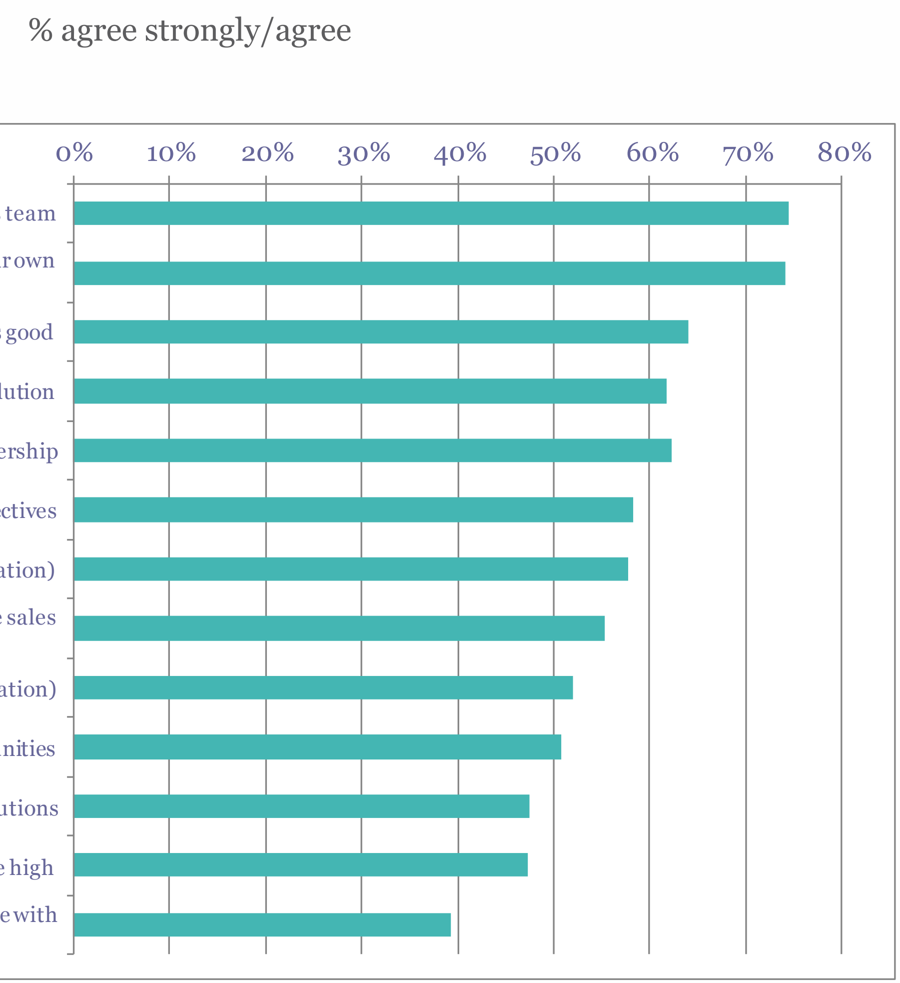


MediaIQ
Spring 2015

% agree strongly/agree



Microsoft Advertising
Spring 2015



Microsoft Advertising
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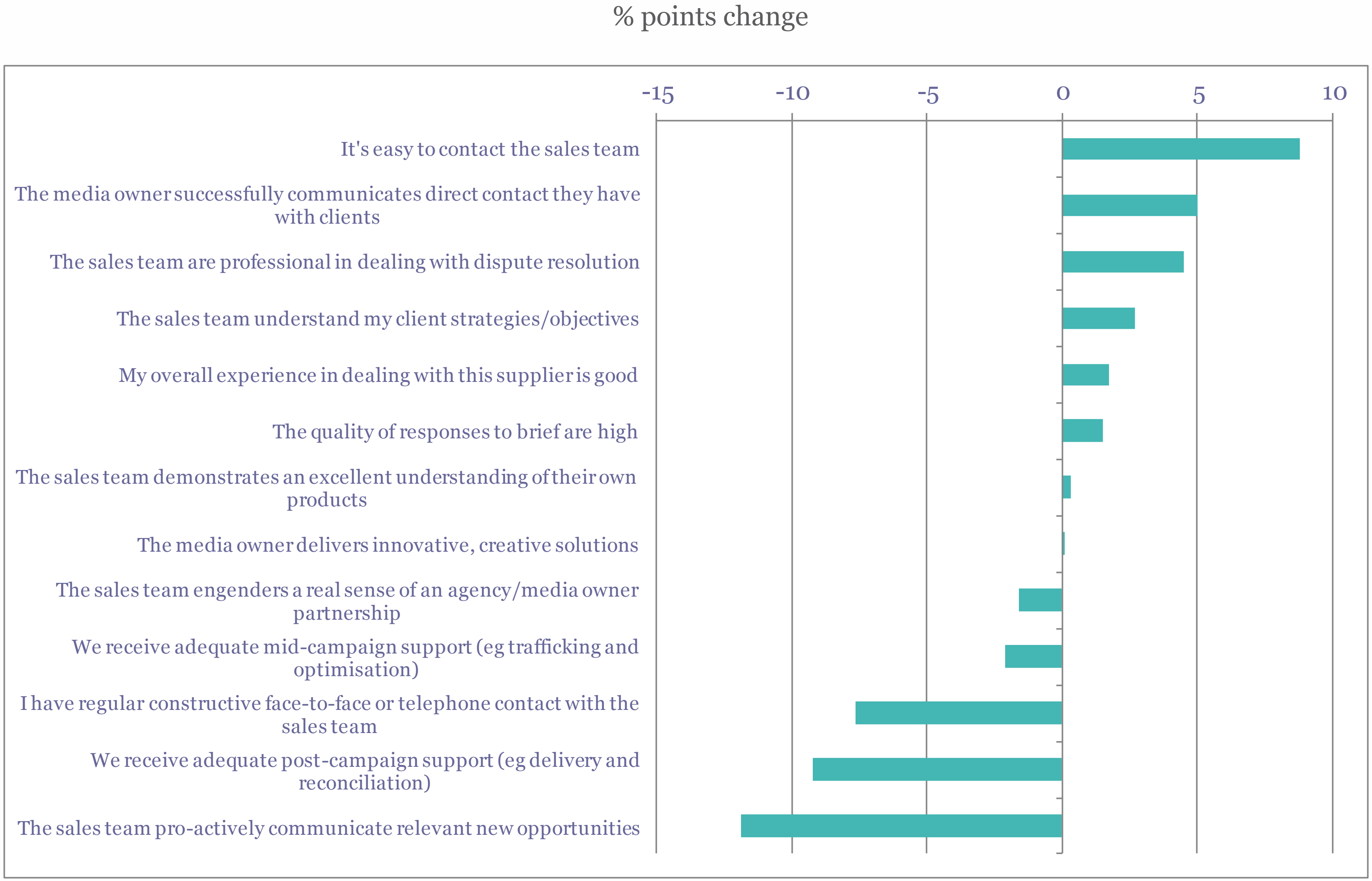
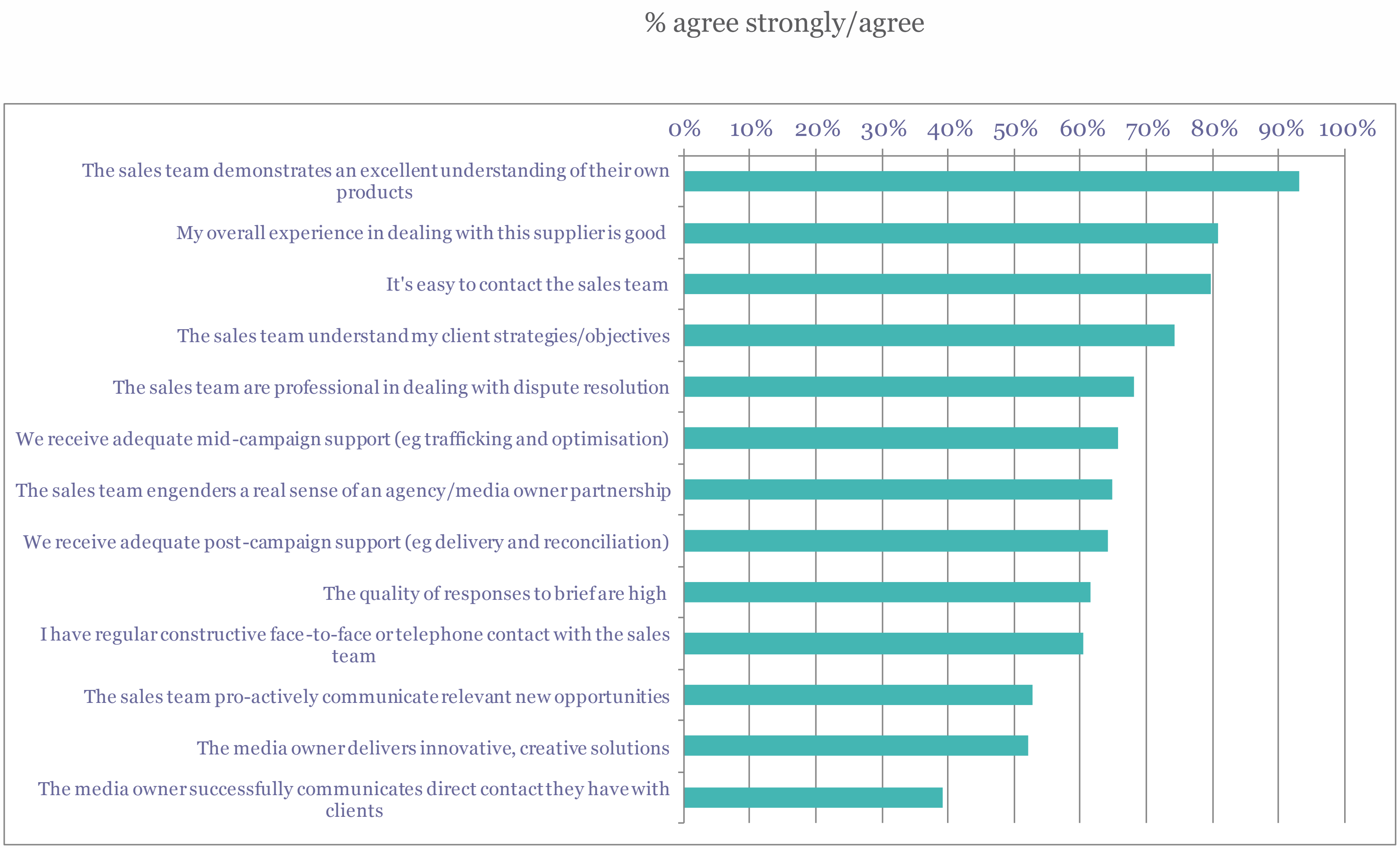
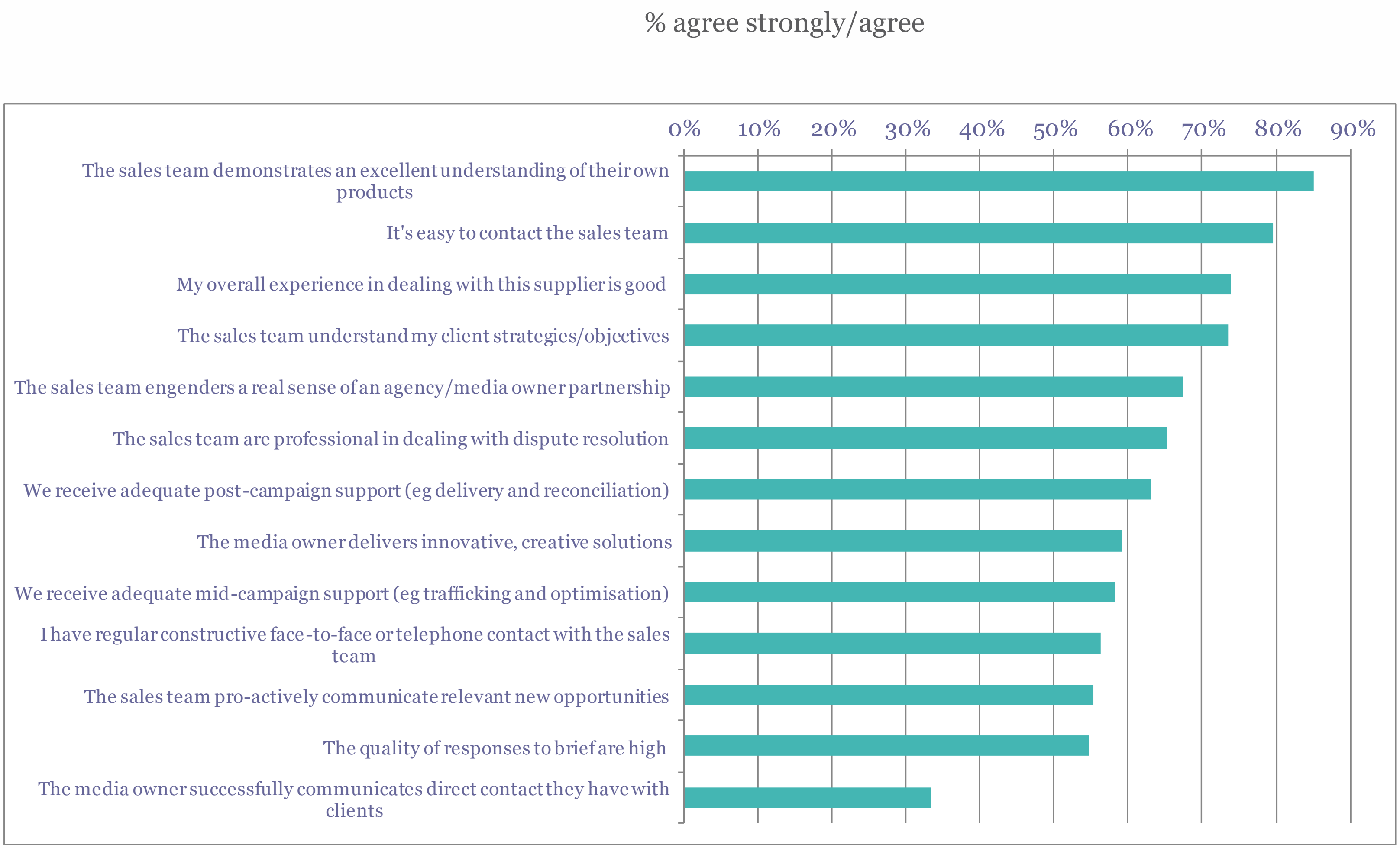


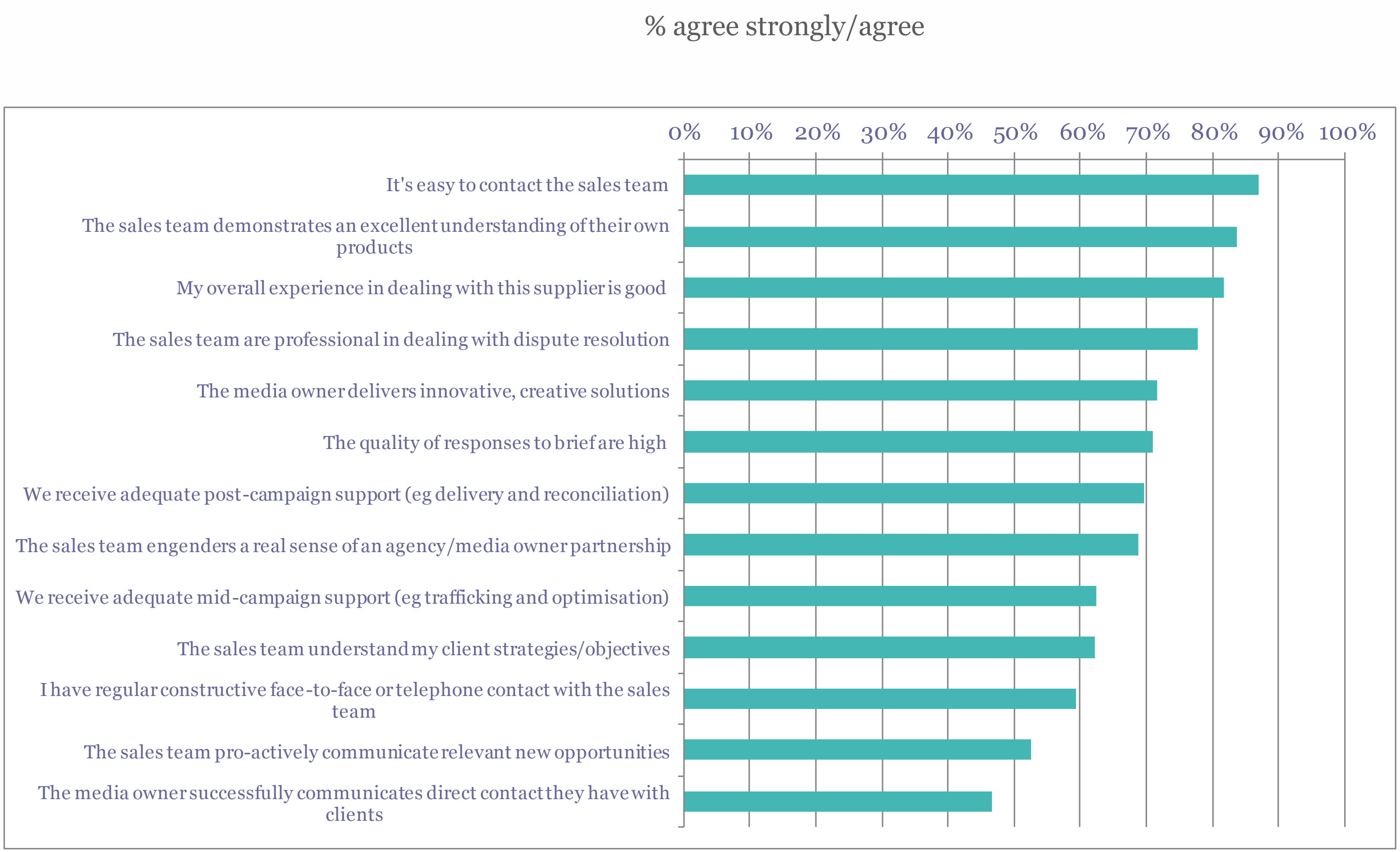
Quantcast
Spring 2015



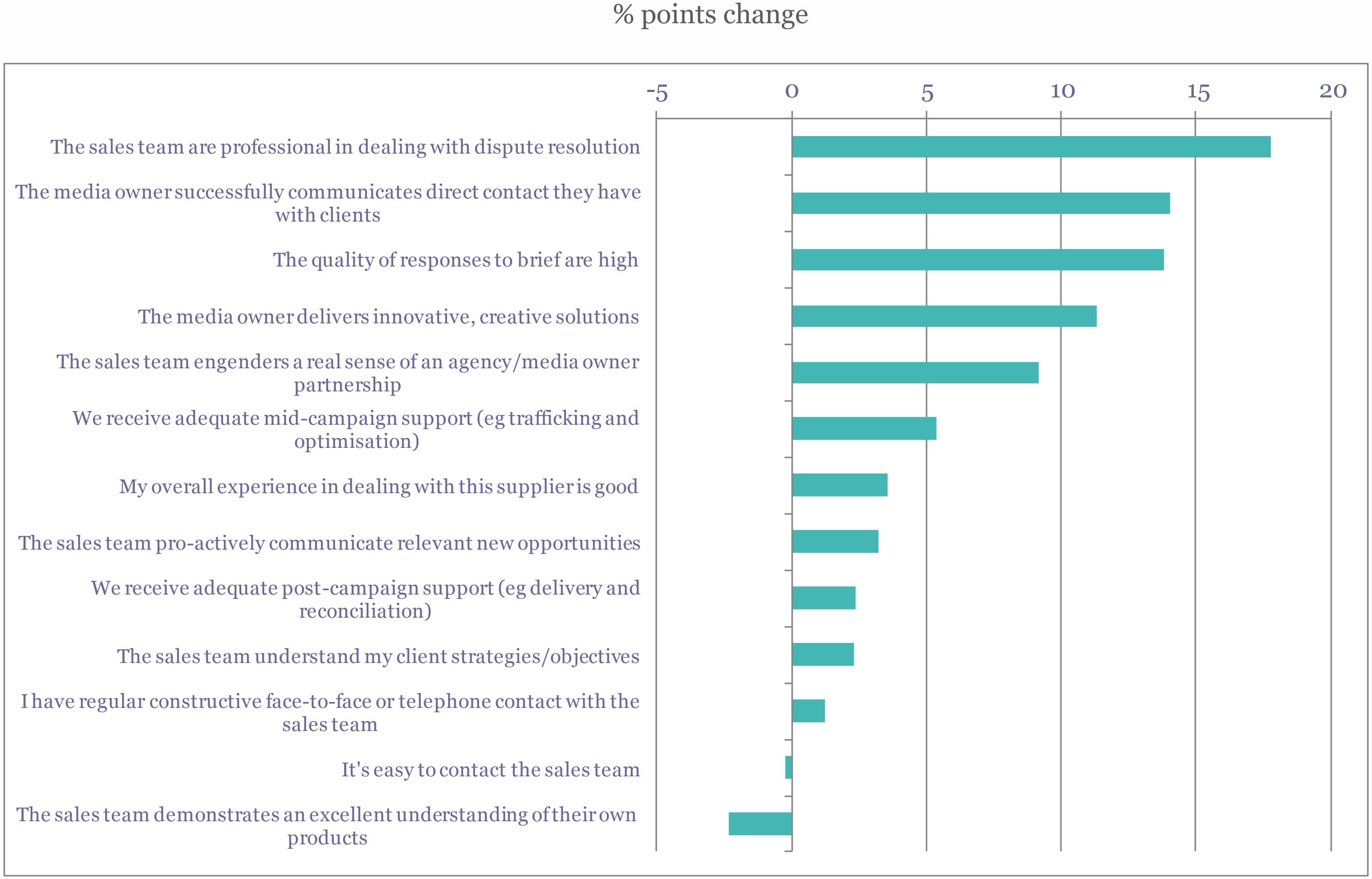
Radium One
Spring 2015



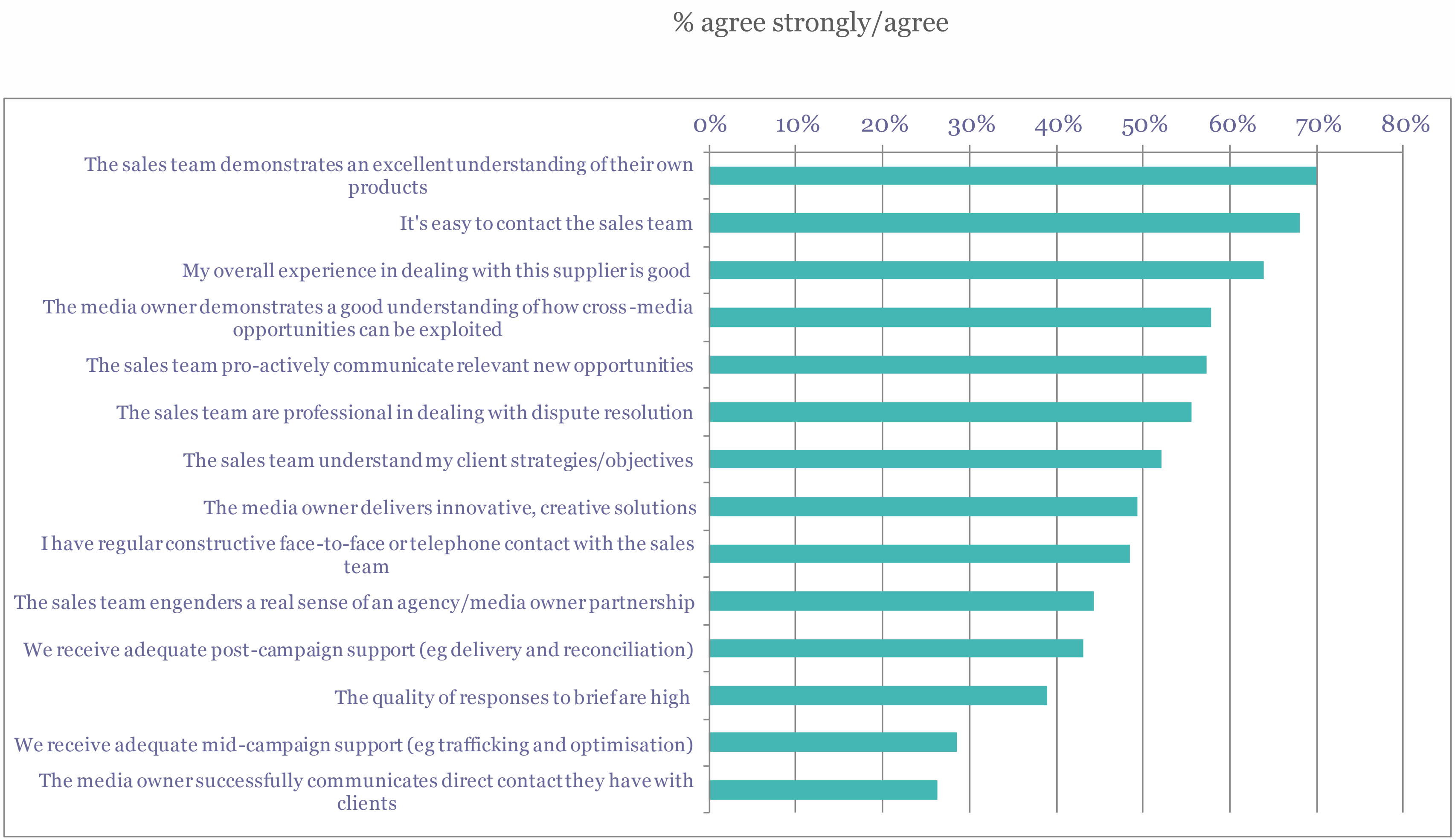
Say Media
Spring 2015



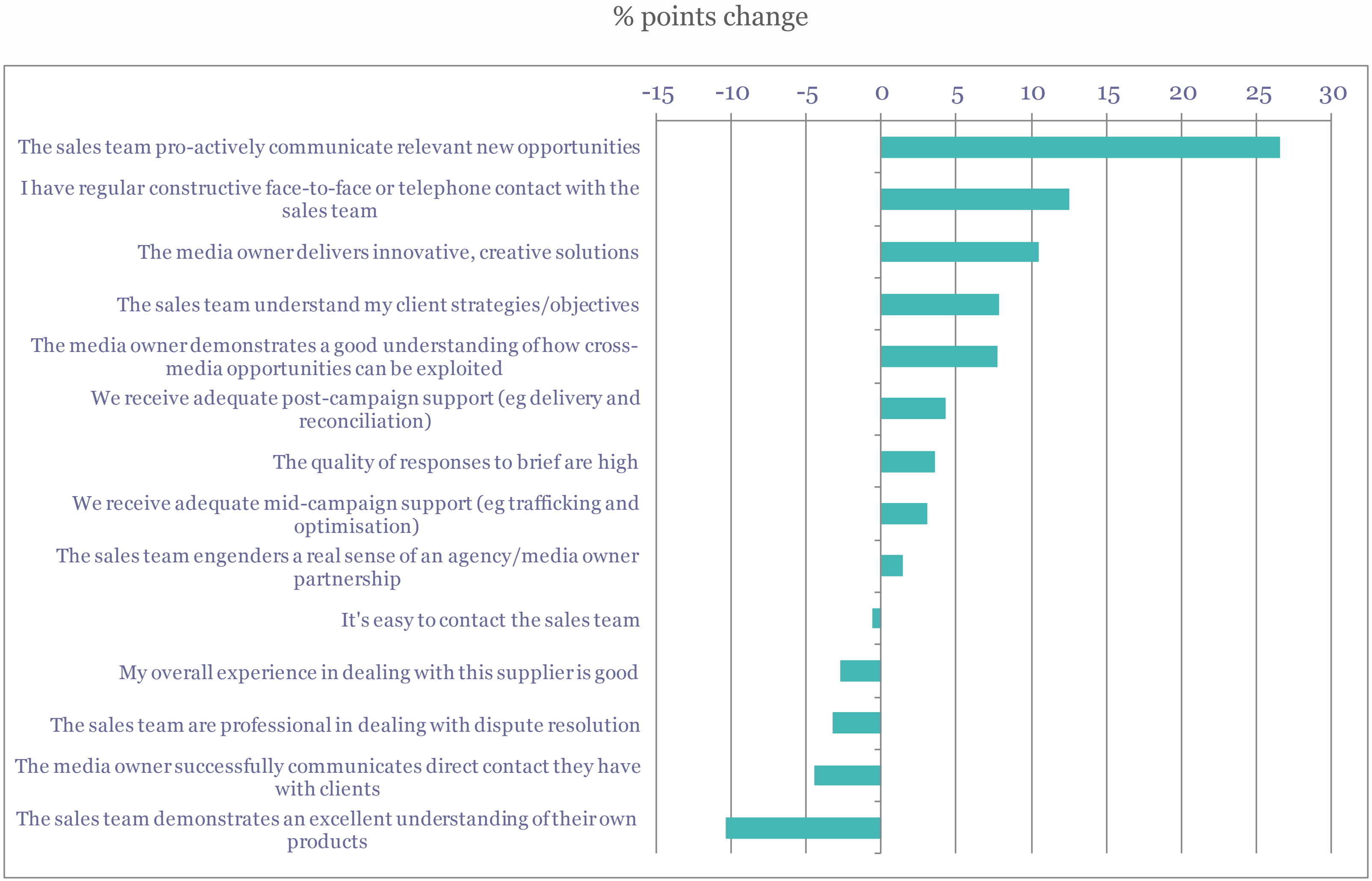
Say Media
Spring 2015 vs. Autumn 2014



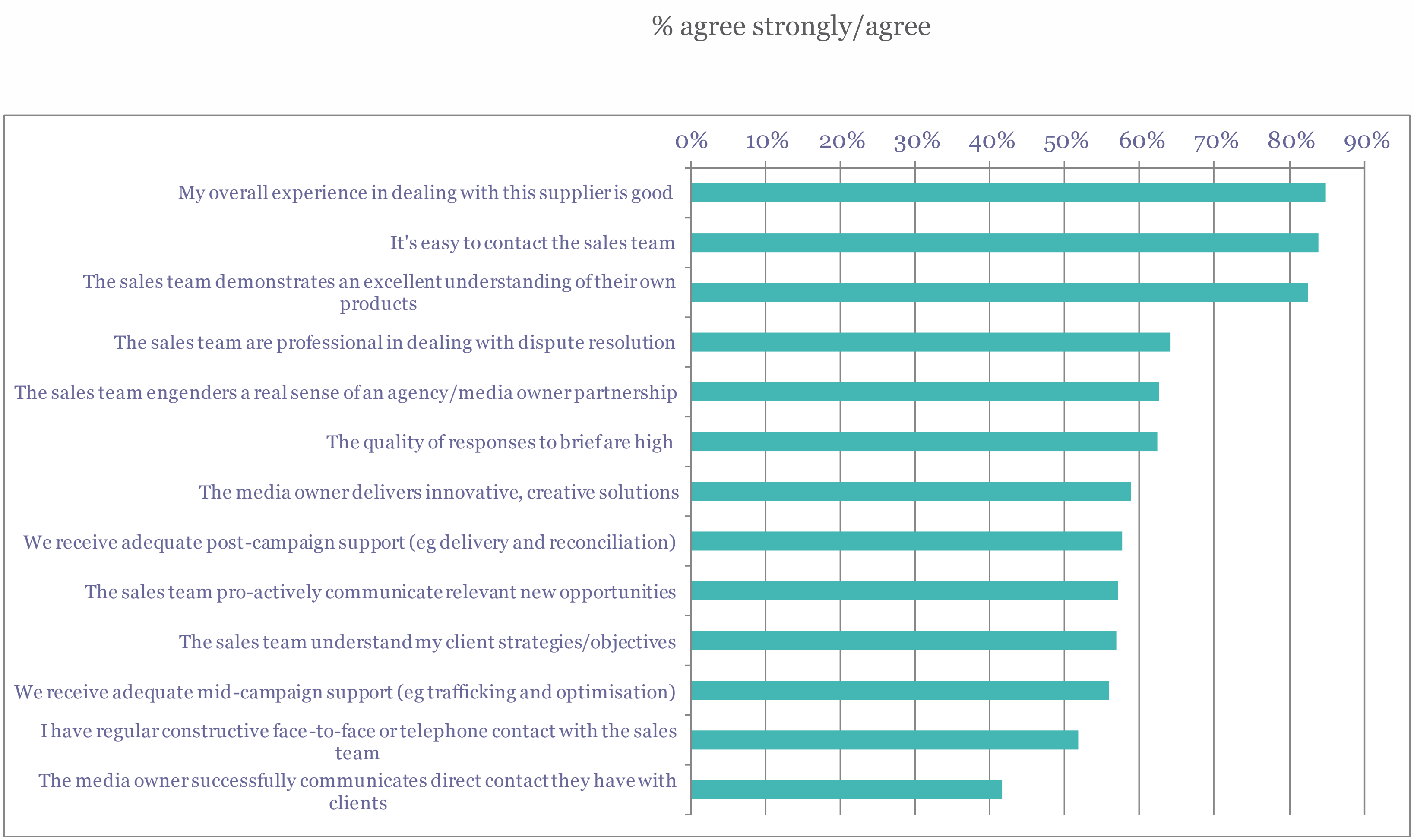
Sky Digital Media
Spring 2015



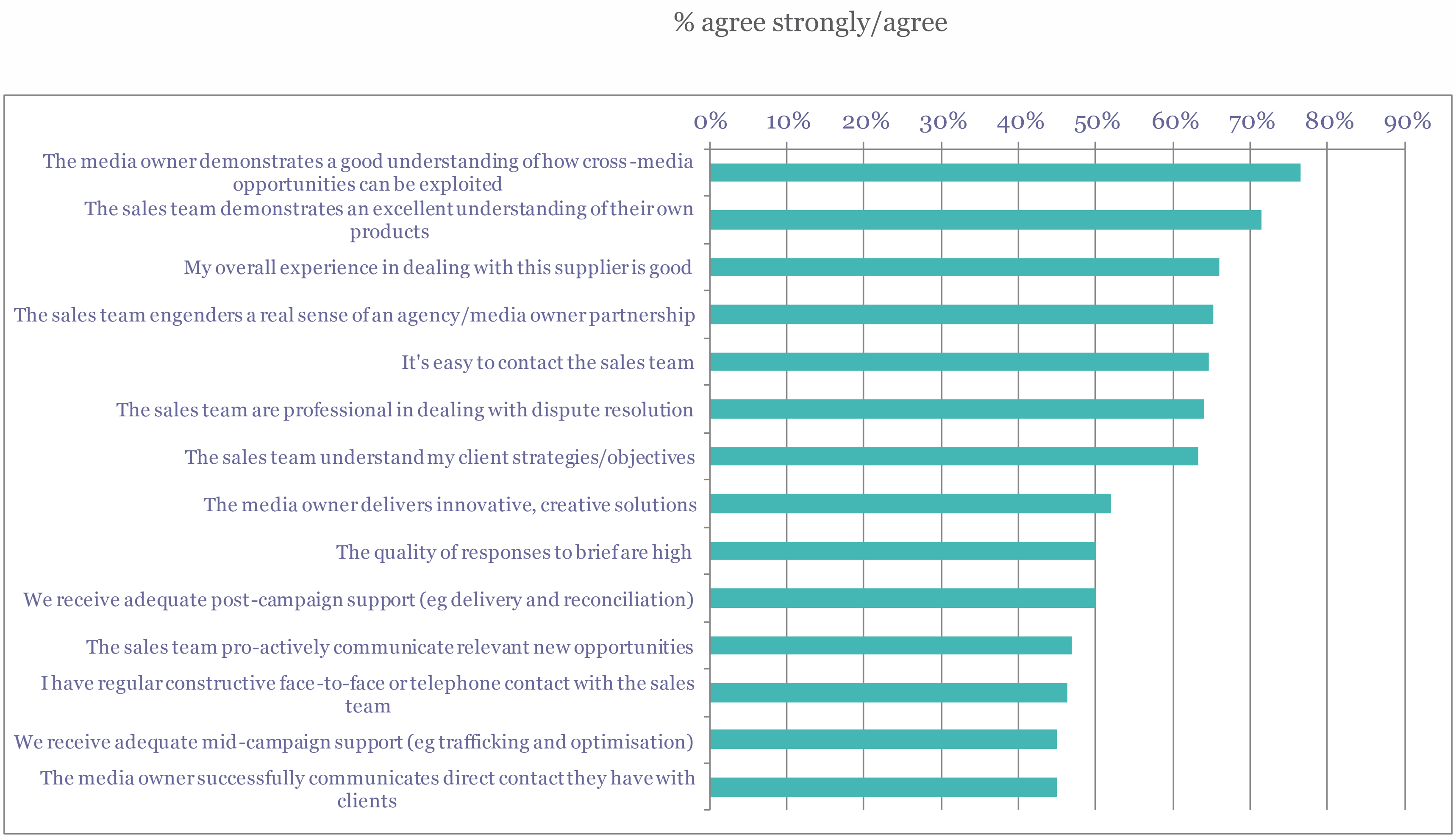
Sky Digital Media
Spring 2015 vs. Autumn 2014



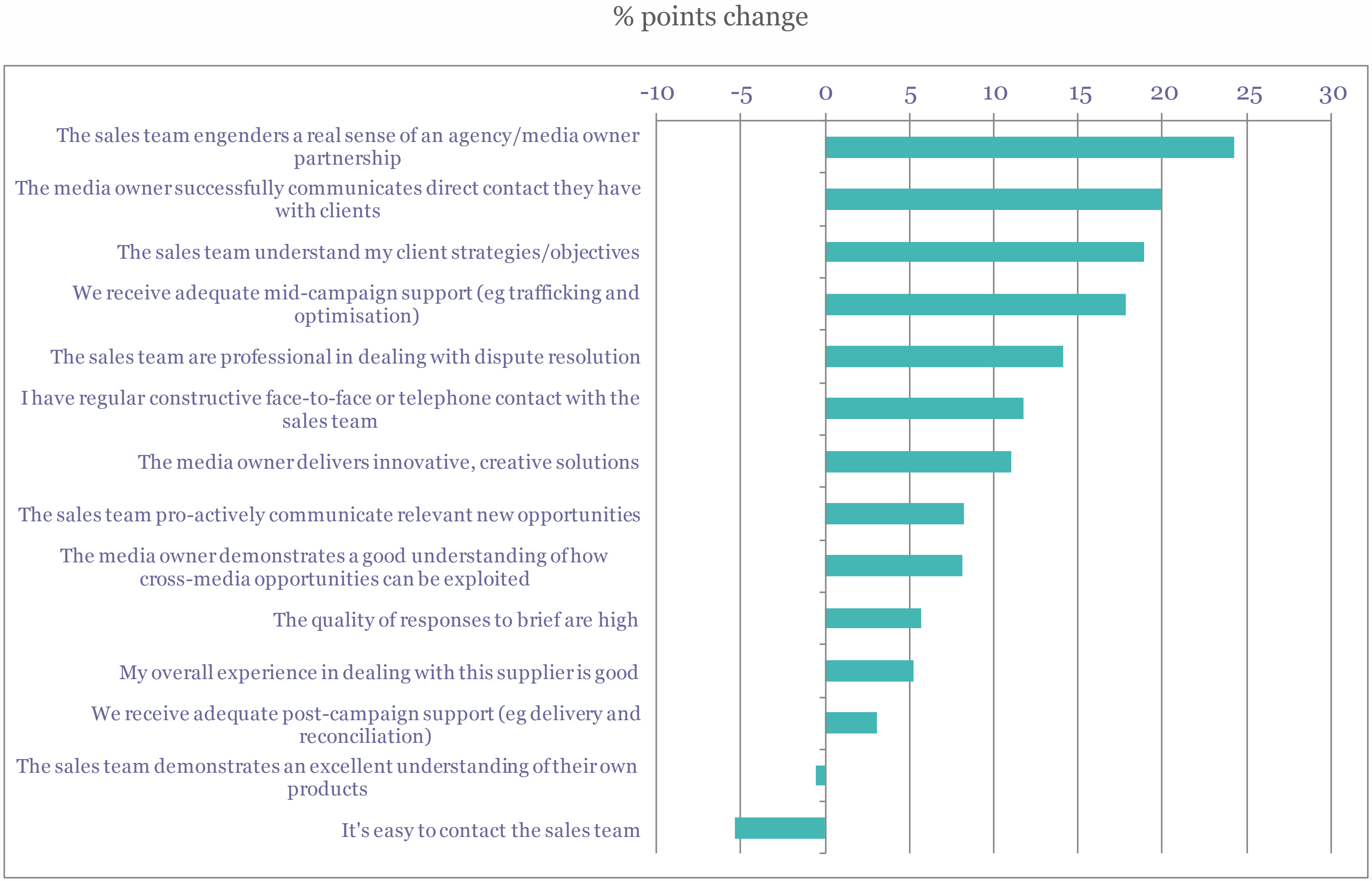
Teads
Spring 2015



Telegraph.co.uk
Spring 2015

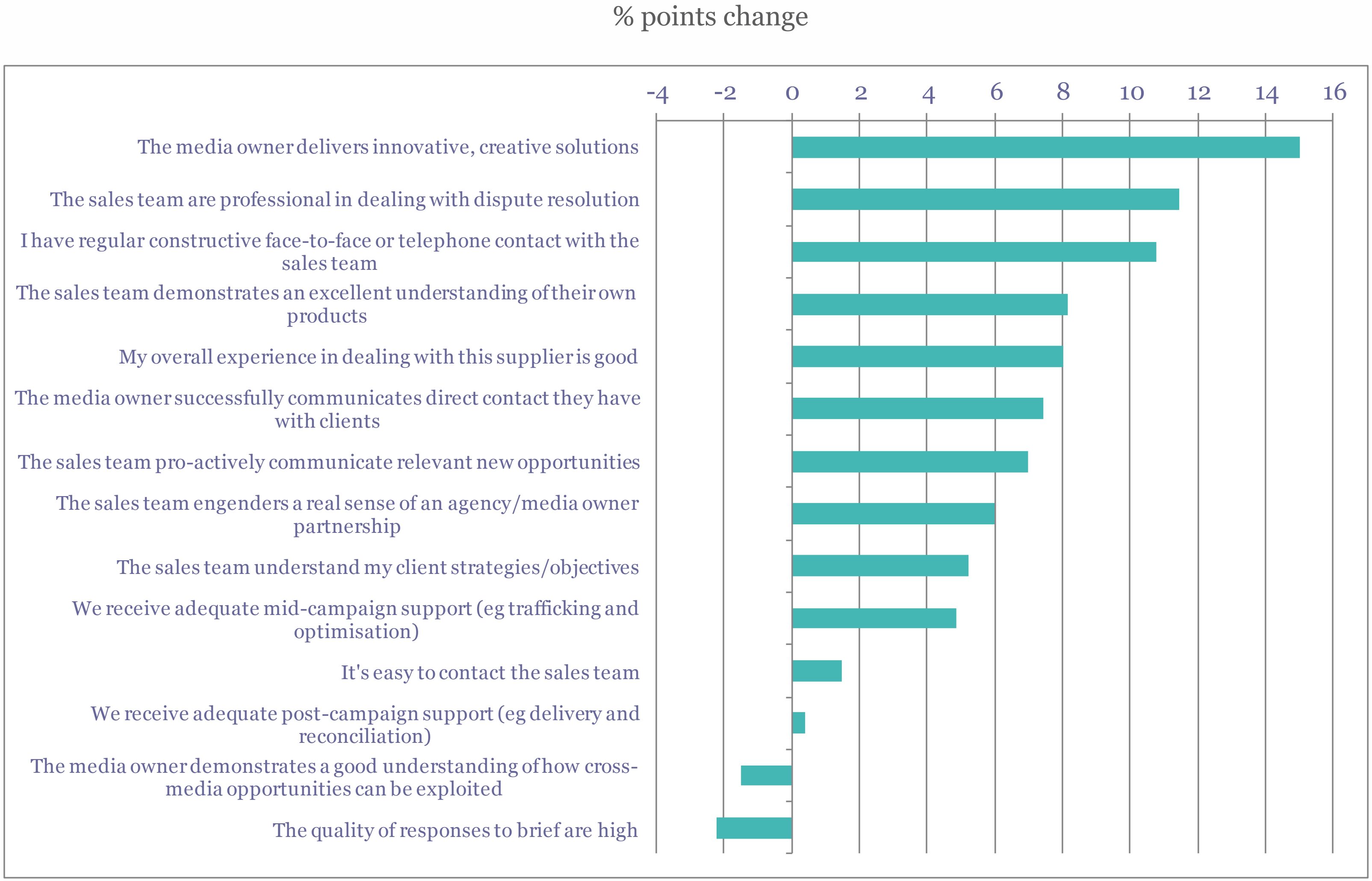


Telegraph.co.uk
Spring 2015 vs. Autumn 2014



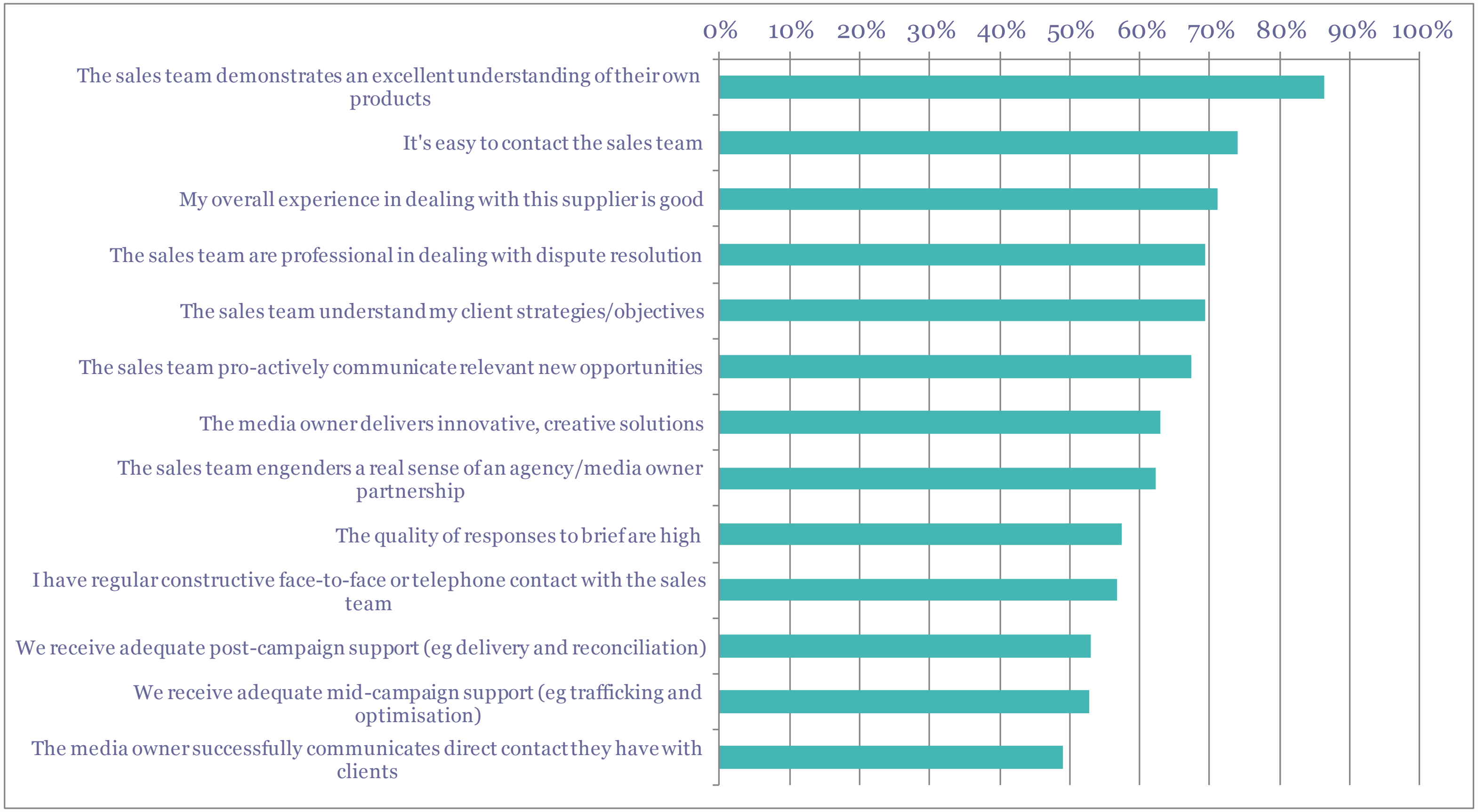
The Guardian
Spring 2015

The Guardian
Spring 2015 vs. Autumn 2014

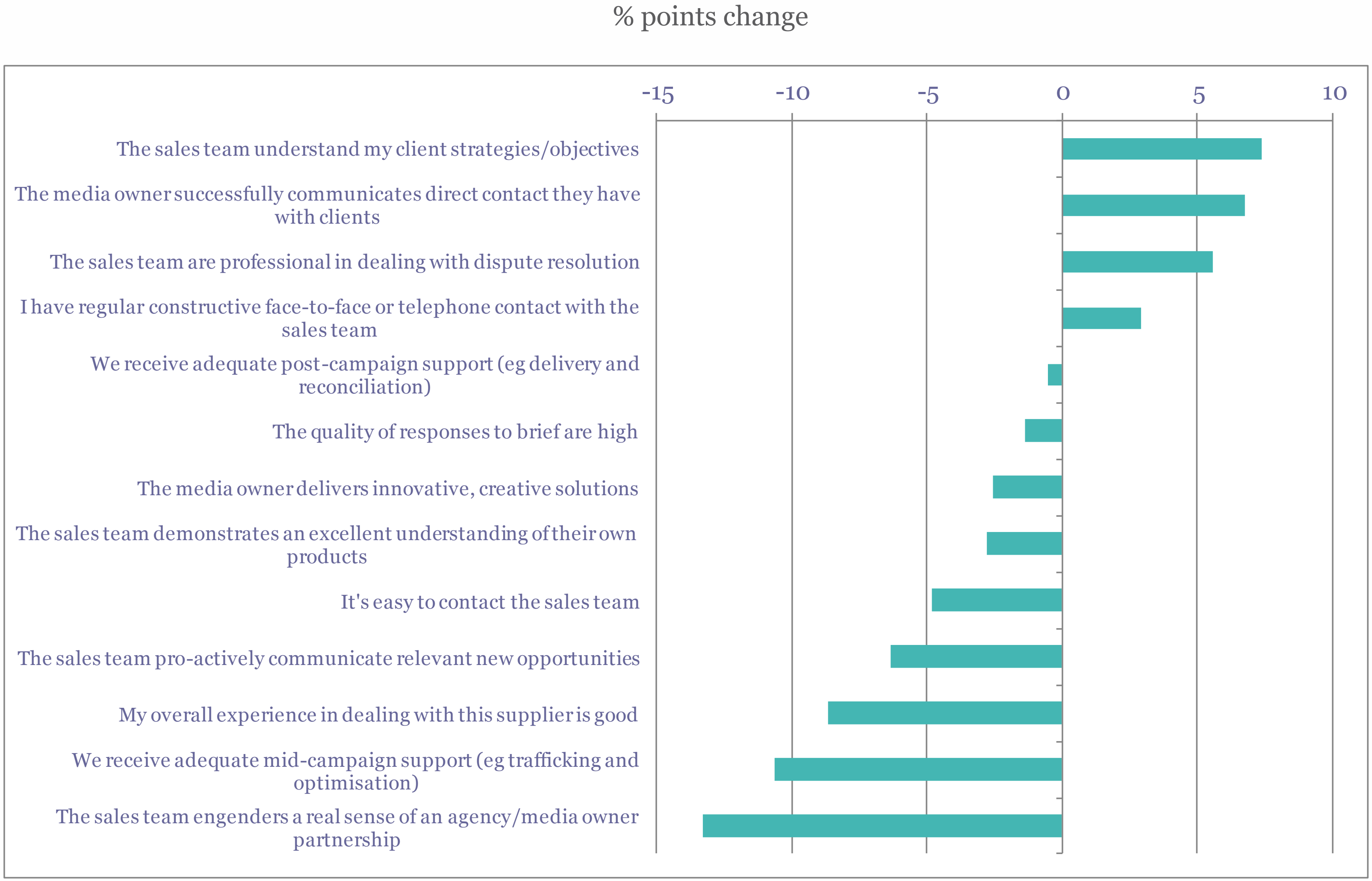


Twitter
Spring 2015

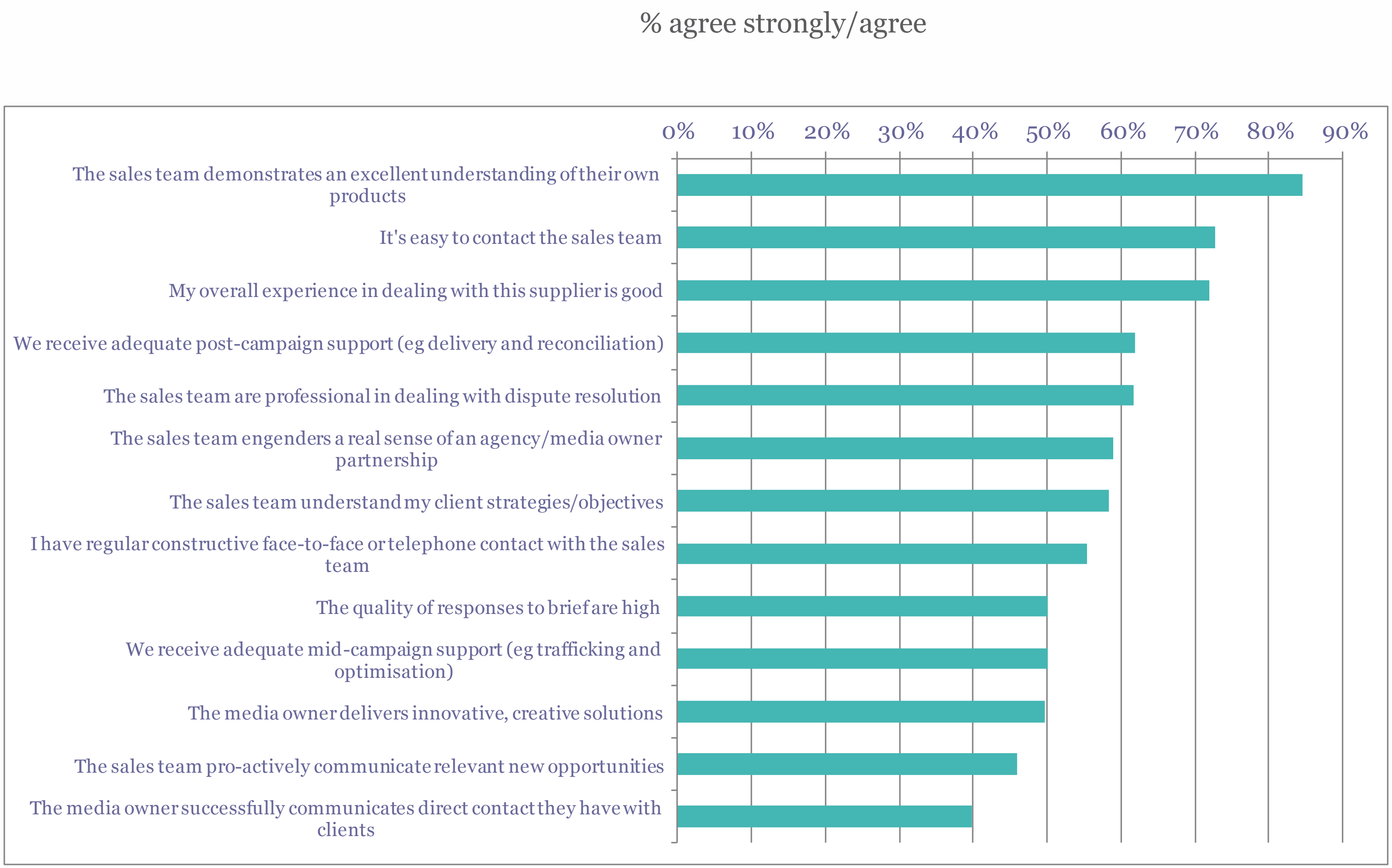
% agree strongly/agree



Twitter
Spring 2015 vs. Autumn 2014

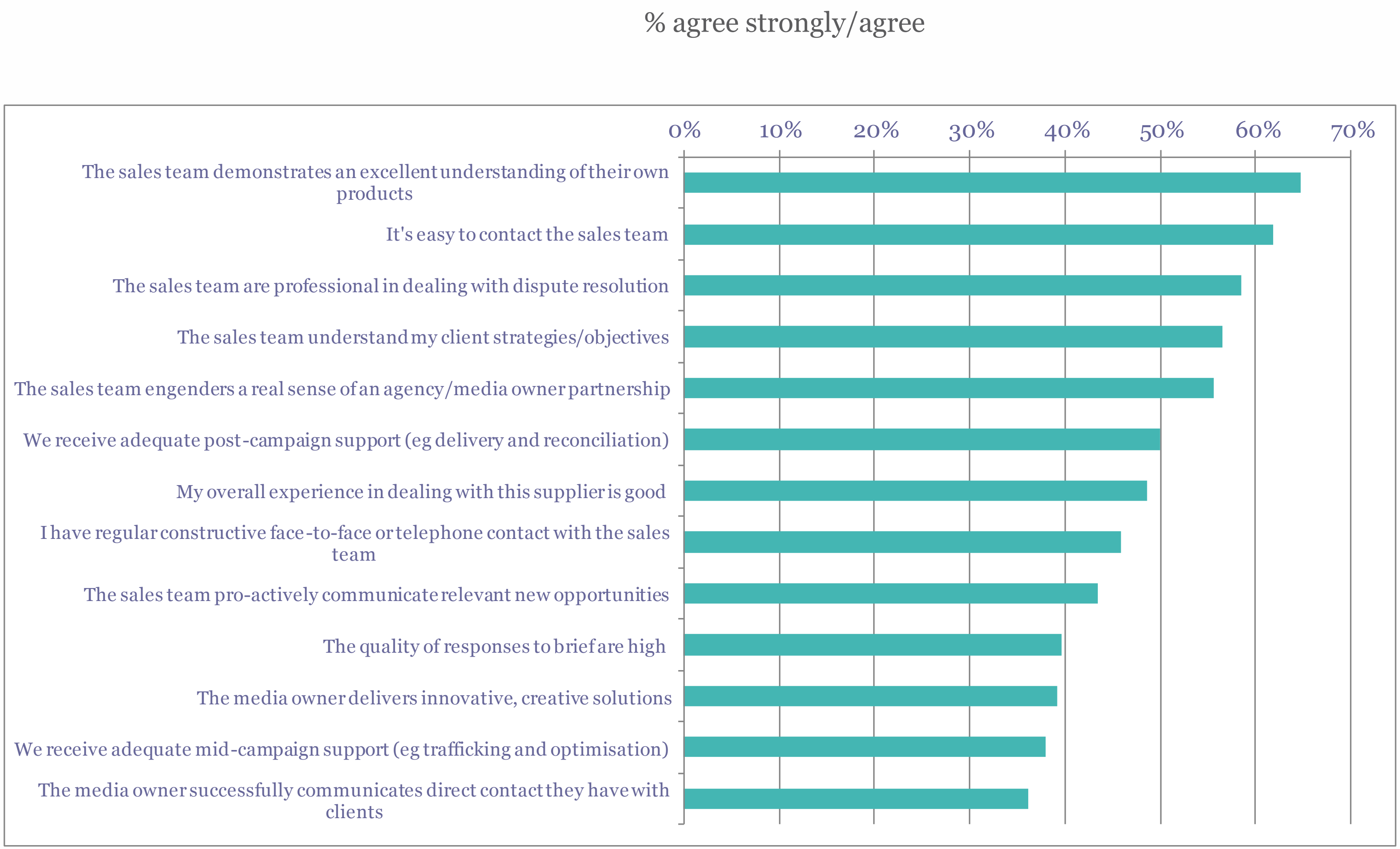


Weve
Spring 2015



Weve
Spring 2015 vs. Autumn 2014

Yahoo!
Spring 2015



Yahoo!
Spring 2015 vs. Autumn 2014

% points change