



2020 Bureau Activity Reports

Bureaux Activity Reports

Summary

THE NEW NORMAL:

- Print circulation declining
- Media Brands transformation
- Digital media increasing
- Demand for new services
- Bureaux revenue 10% down
- Total Media audience coming up
- Brand safety and Ad Trust initiatives
- Digital Out of Home
- Events stopped by Covid-19



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Activity Reports

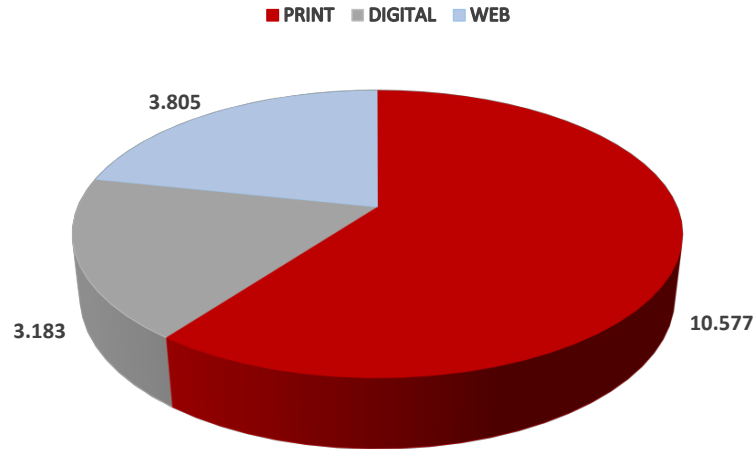
- | | |
|----------------|----------------|
| Austria | Japan |
| Australia | Poland |
| Belguim | Portugal |
| Brazil | Spain |
| Czech Republic | Sweden |
| Finland | Switzerland |
| France | Taiwan |
| Germany | The Nederlands |
| Hungary | UK & Ireland |
| India | USA & Canada |
| Italy-CSST | |



Reports	21	80,77%
Not received	5	19,23%
Total	26	100,00%

Bureaux Activity Reports

Number of titles audited



Print still is a big part of our auditing business

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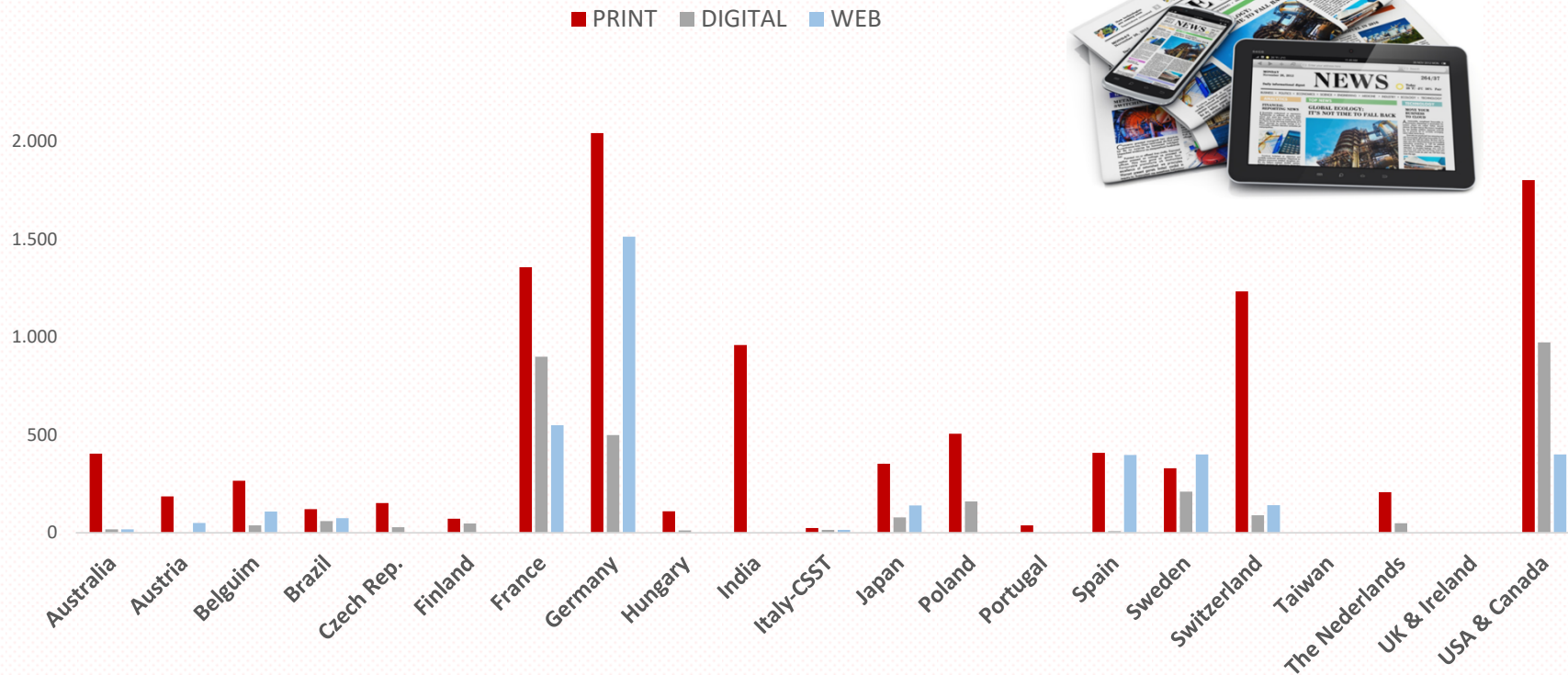
Number of titles audited

Reports	PRINT	DIGITAL	WEB
Austria	186	0	50
Australia	405	17	17
Belguim	266	38	108
Brazil	120	60	75
Czech Republic	152	28	0
Finland	72	47	0
France	1.358	900	550
Germany	2.044	499	1.514
Hungary	110	12	0
India	960	0	0
Italy-CSST	24	14	14
Japan	353	78	139
Poland	506	160	0
Portugal	38	0	0
Spain	409	8	397
Sweden	330	210	400
Switzerland	1.234	89	141
Taiwan			
The Netherlands	207	49	0
UK & Ireland			
USA & Canada	1.803	974	400
TOTAL	10.577	3.183	3.805



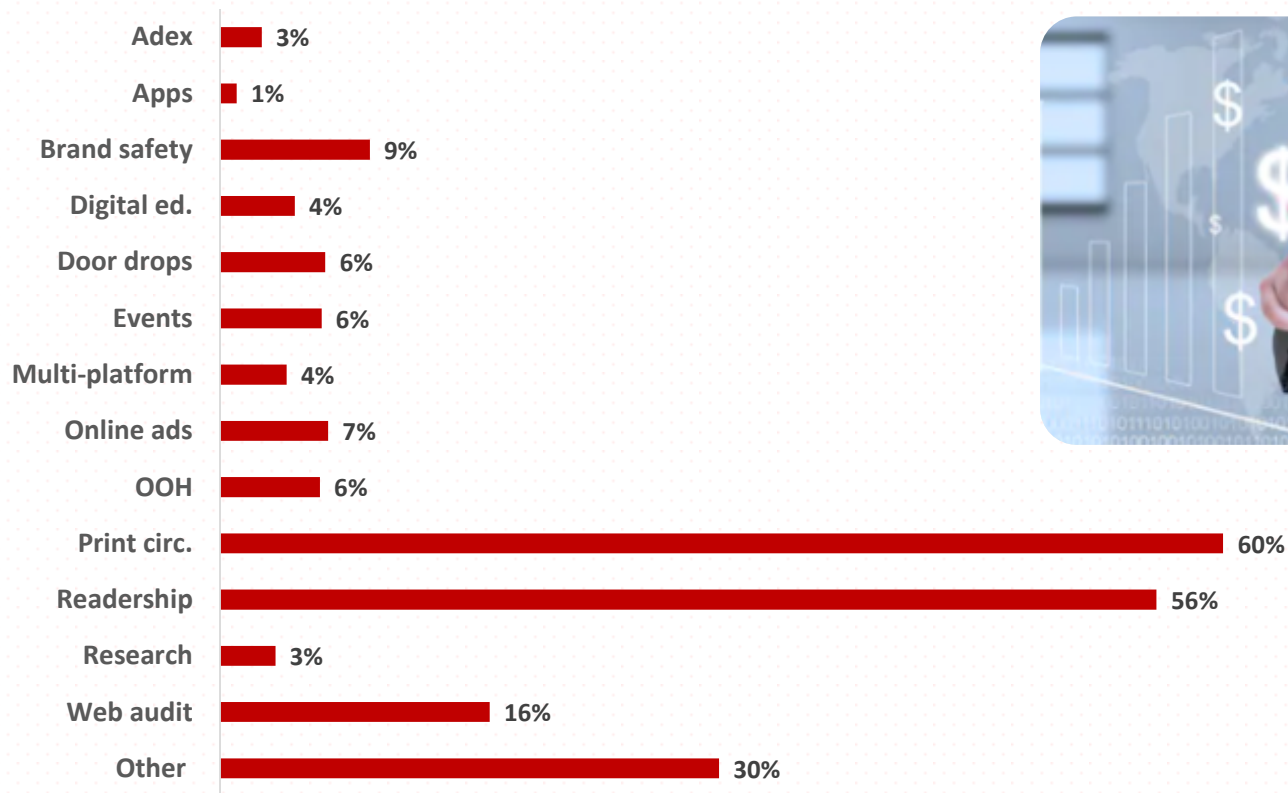
Bureaux Activity Reports

Number of titles audited



Bureaux Activity Reports

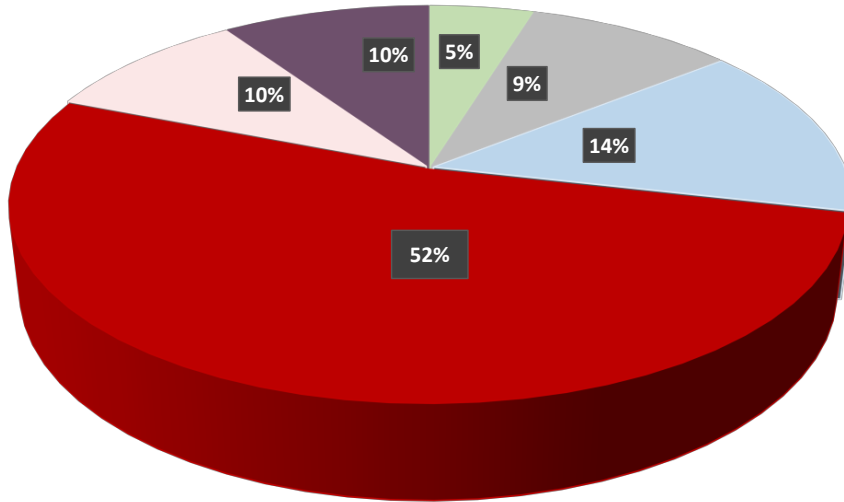
Revenue source breakdown by services



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Change in revenue reported 2019/2018

■ >20% growth ■ <10% growth ■ Same ■ <10% decline ■ 10-20% decline ■ >20% decline



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Change in revenue reported 2019/2018

	>20% growth	<10% growth	Same	<10% decline	10-20% decline	>20% decline
Austria		X				
Australia			X			
Belguim				X		
Brazil		X				
Czech Republic				X		
Finland				X		
France				X		
Germany					X	
Hungary				X		
India			X			
Italy-CSST						X
Japan				X		
Poland				X		
Portugal				X		
Spain				X		
Sweden	X					
Switzerland			X			
Taiwan						X
The Netherlands				X		
UK & Ireland					X	
USA & Canada				X		



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Partnerships and plans for the future

- Closer cooperation with local JICS
- TV audience measurement (Kantar)
- Campaign measurement (Nielsen DAR)
- Agreements with OOH measurement companies
- Internet audience audits (comScore, Nielsen, Kantar)
- Total Audience Measurement initiatives
- Consultants to deliver audits for marketers on media buying cost
- Agreement with National Readership Survey
- AD trust initiatives: Brand safety, viewability, user experience, etc.
- Influencers marketing Code of Practice



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What are the main issues/challenges facing your bureau?

"1. Readers are decreasing year after year.
2. Publications are decreasing year after year.
3. Advertising in media are decreasing."

"Due to digital media digitalization, Audit seems to be difficult yet clients are reluctant to pay for measurement."

" 1. Decline in revenue from print.
2. Online media still reluctant to Audit.
3. TV, radio audience measurement not audited "

"1. Measurement and auditing pressure and awareness among media buyers.
2. Transparency in the marketplace with new global players.
3. Lack of profitability in the media Business."

"Continued decline in printed editions of newspapers and magazines.
Continued increase of epapers
Dominance of GAFA, not audited
Digital Media: growing shares of the total use of digital media products for apps.
Increasing share of digital out of home."

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Other comments: trends and business opportunities

"Print audit services are in deep attrition and other media audit is now viewed as the marketer's responsibility. (via PwC, Deloitte etc.) there is little to no industry impetus for audit wide frameworks. There is opportunity in industry accreditation to best practice codes: eg Accreditation to the AIMCO Influencer Marketing Code of Practice "

"Podcast audit and measurement, Gold Standard audits, Influencer audits, New media subsidy certificates."

"OOH audits
Increase NRS participants to local newspapers
More consultancy work for publishers."

"To persuade existing or new publishers to join the ABC .
To provide new services (digital publications, content ...)
To extend education in accounting and digital technologies."

"Partnership with the Media measurement organisations for TV, Internet, Radio, OOH and Decision makers survey. Main goal is to provide a Total Media Audience Measurement."

"Independent, third-party assurance is needed more than ever.
Digital ad fraud needs multiple coordinated efforts to be significantly minimized
Global collaboration."



**Thanks and
Good luck!**