

GIACOMELLI MEDIA



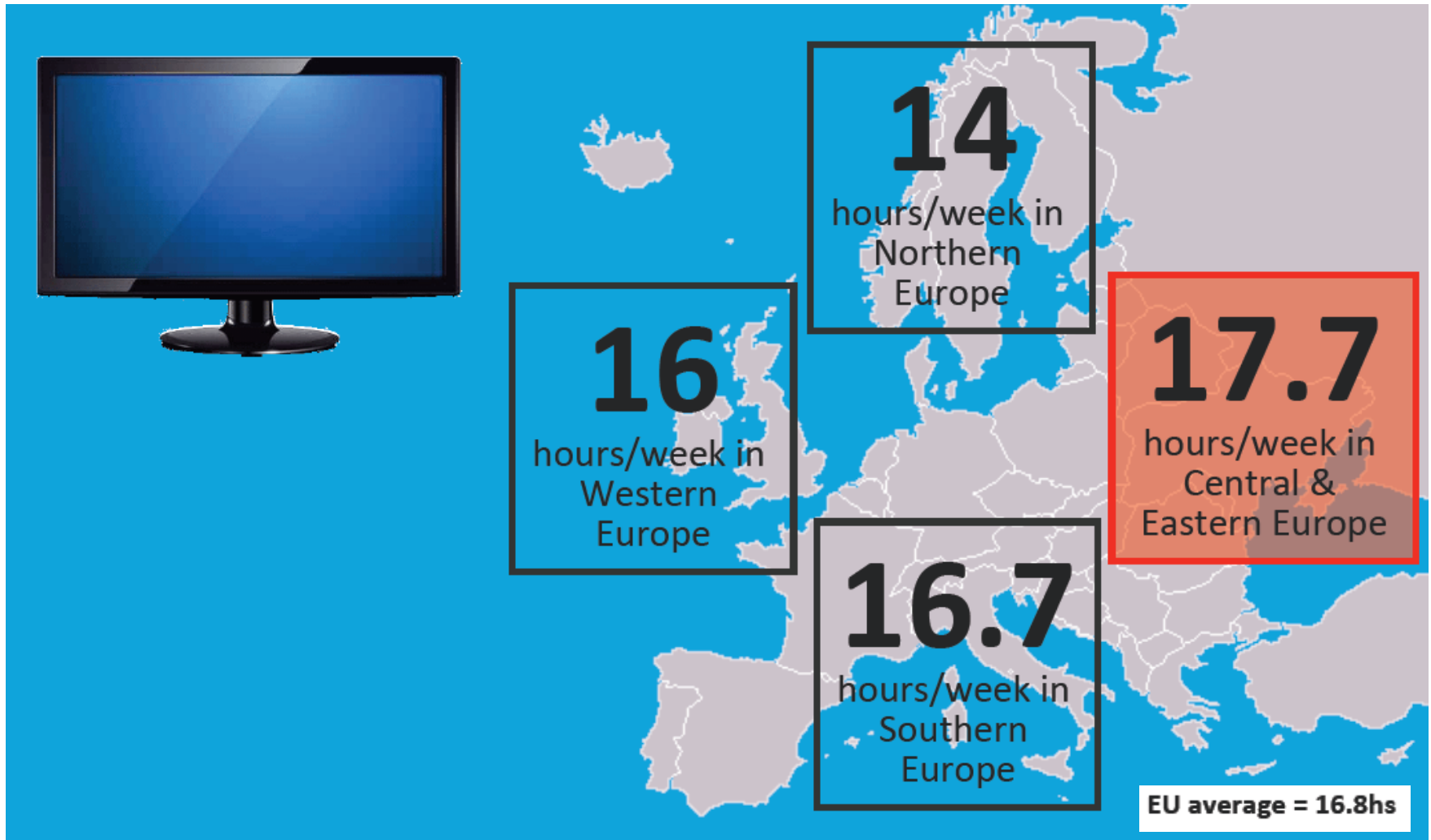
UNDERSTANDING ADVERTISING
IN CHANGING ENVIRONMET

Changed landscape



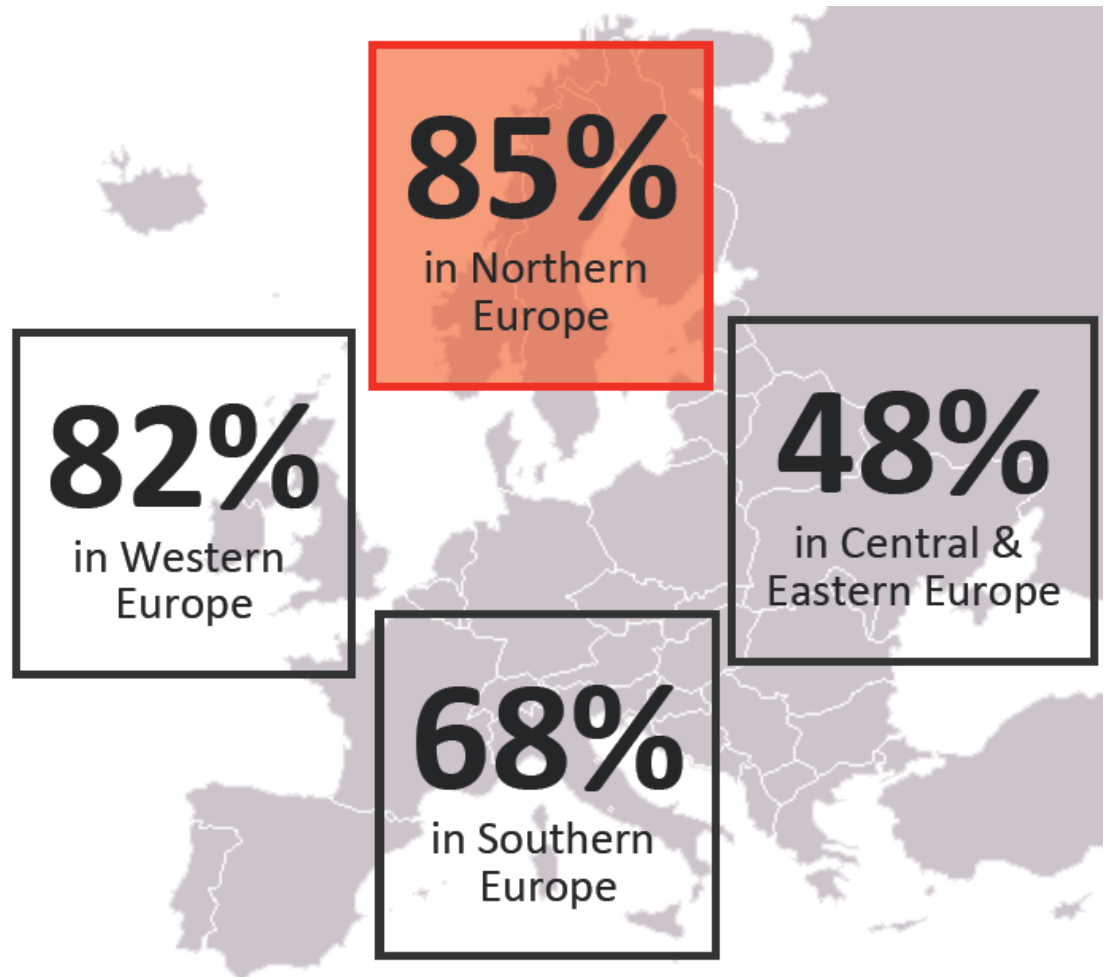
Source: Mediascope Europe; 2012

European TV consumption



Source: Mediascope Europe; 2012

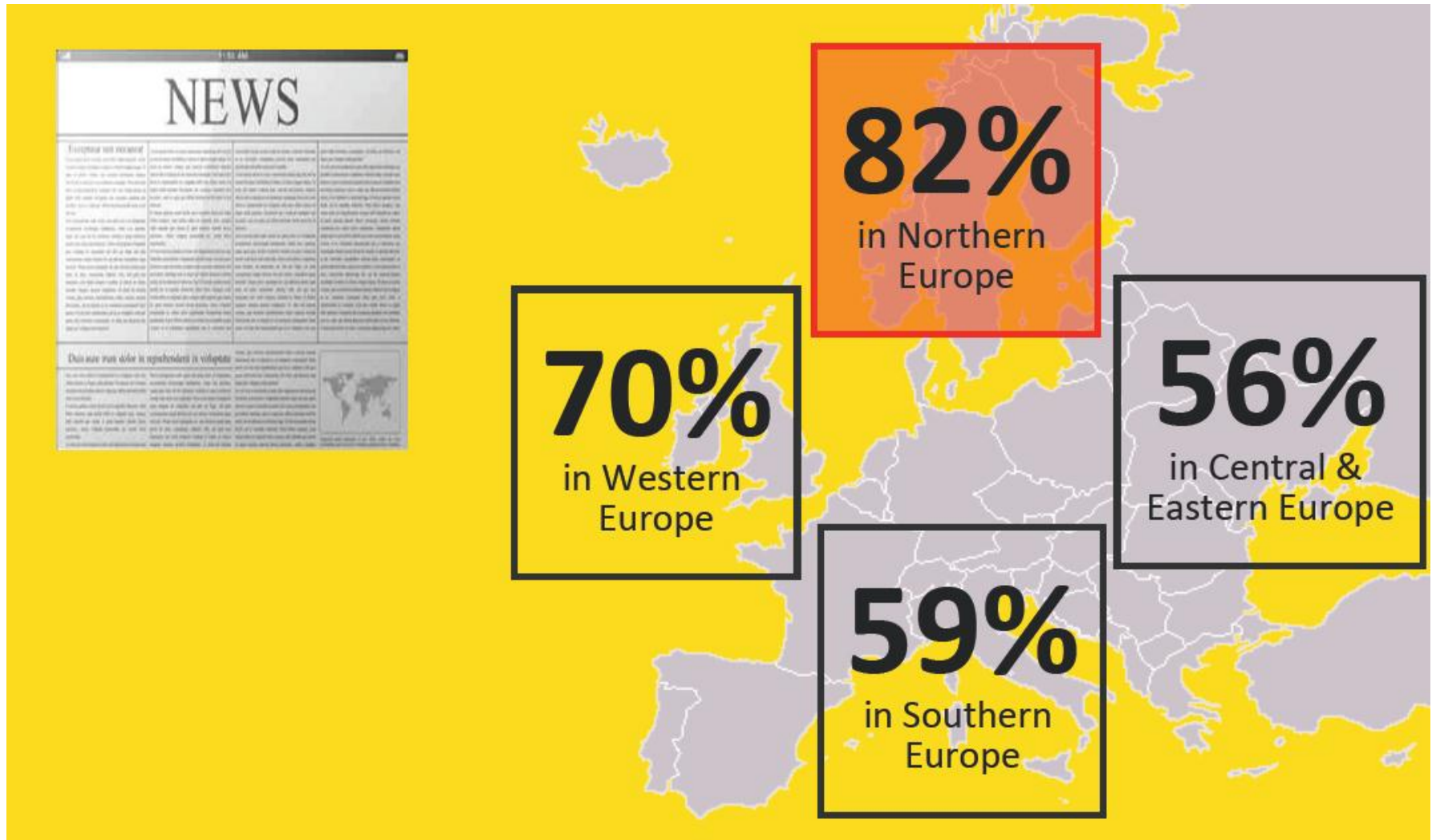
European Radio consumption



EU average = 64%

Source: Mediascope Europe; 2012

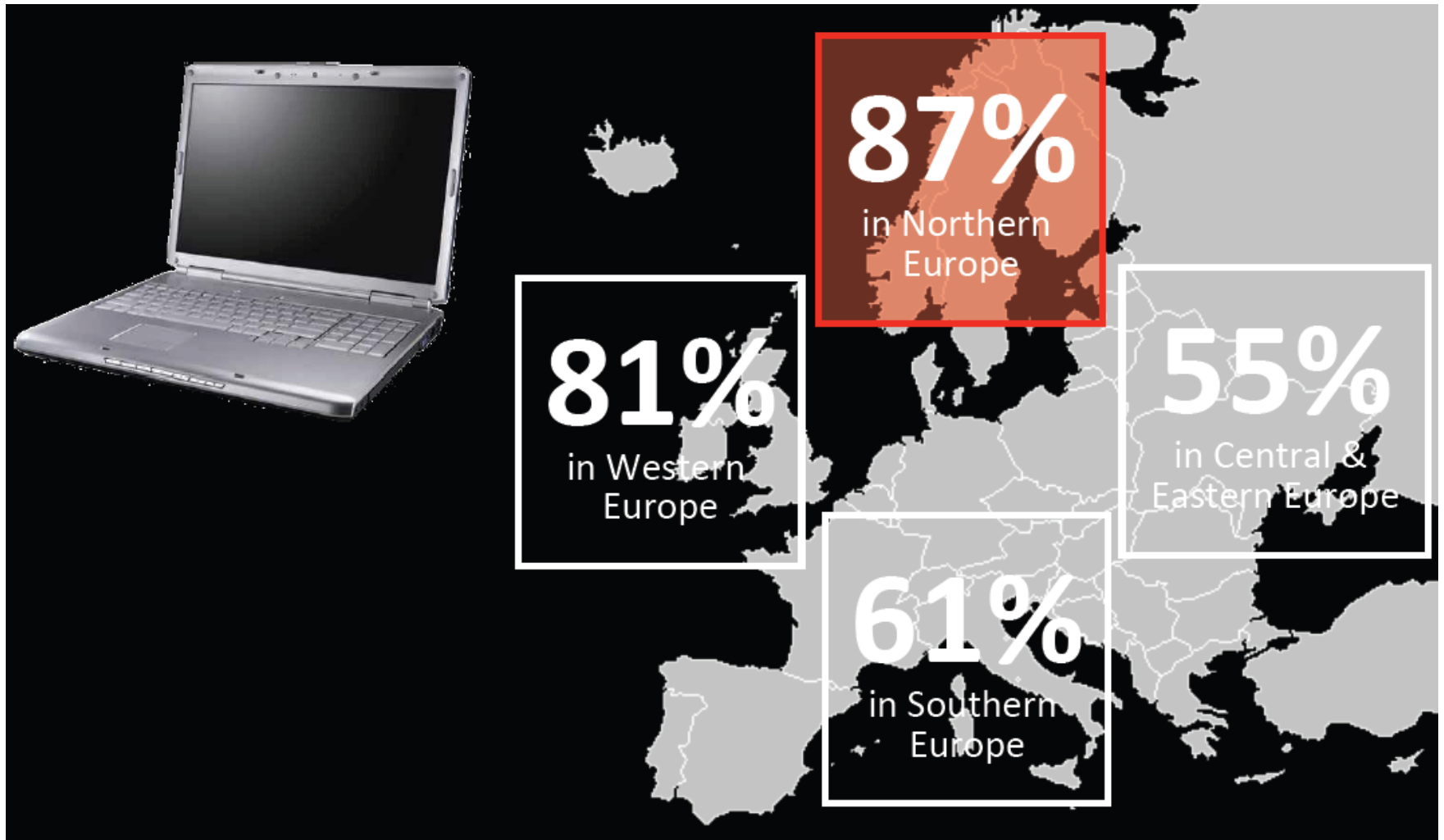
European newspapers consumption



Source: Mediascope Europe; 2012

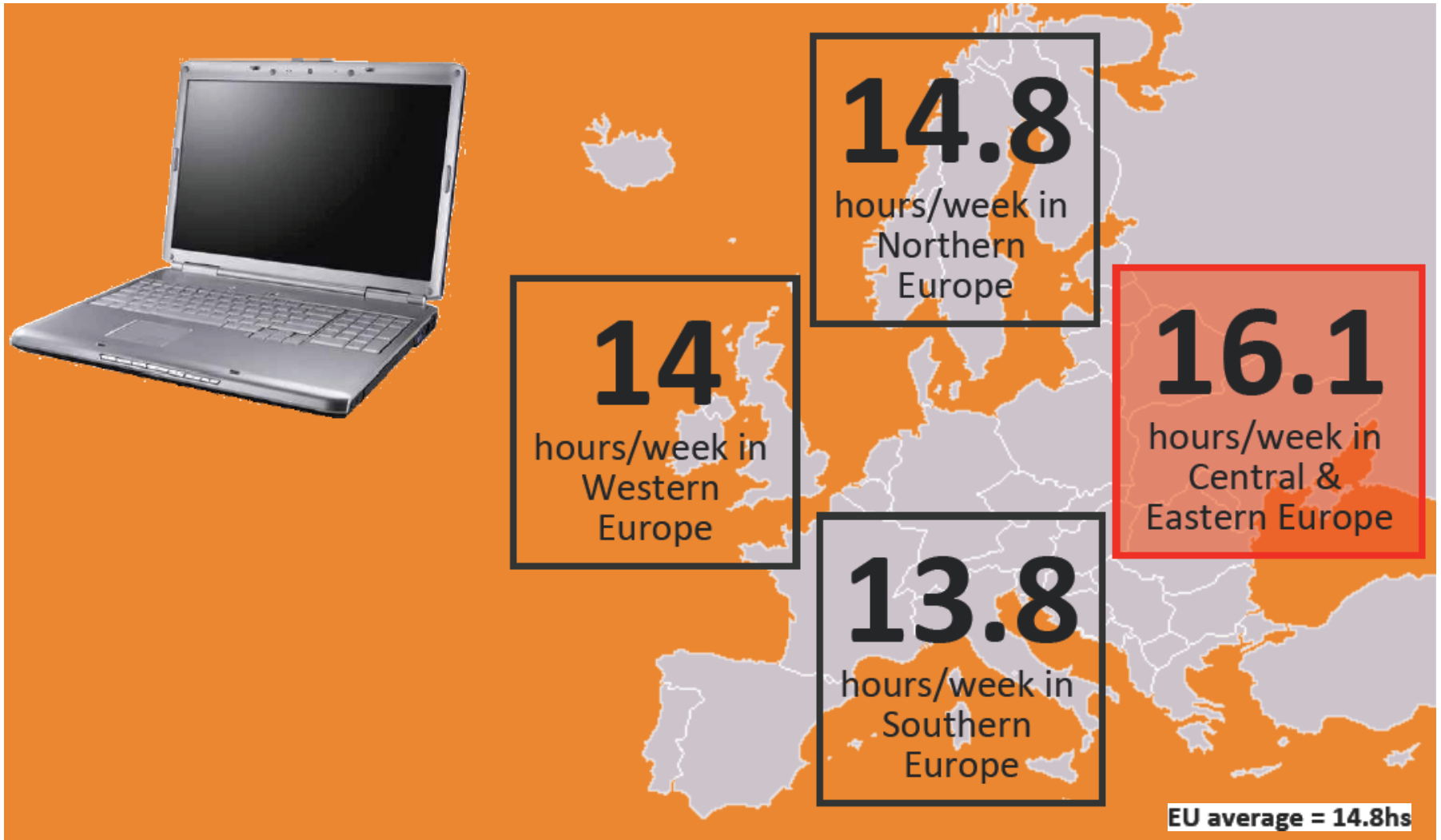
EU average = 62%

European internet consumption (%)



Source: Mediascope Europe; 2012

European internet consumption



Source: Mediascope Europe; 2012

Changed landscape

- ✓ 37% of all Internet users in Europe go online via more than one device
- ✓ 13,3 hours spent online via computer each week, predominantly used in the evening
- ✓ 9,4 hours per week spend online through mobile, mainly day usage
- ✓ 67% of European tablet users watch TV whilst they are online on a tablet
- ✓ The Internet is increasingly becoming the choice for consumption of other media – TV, radio, newspapers

Source: Mediascope Europe; 2012



Changing landscape – new opportunities

- ✓ Minority media are often overlooked => new challenge: to overcome old patterns
- ✓ Local and regional media remain important community builders and messengers
- ✓ Successful models in regional and minority pooling (Dewezet, Primorski dnevnik)

DEWEZET
Wir sprechen Ihre Sprache

PYRMONT NACHRICHTEN
Wir sprechen Ihre Sprache

NEUE DEISTER-ZEITUNG
Wir sprechen Ihre Sprache

SCHAUMBURGER ZEITUNG
Wir sprechen Ihre Sprache

SCHENBERG-LIPPISCHE LANDES-ZEITUNG
Wir sprechen Ihre Sprache

hallo SONNTAG
HAMELN / BAD PYRMONT

hamelner MARKT

Nordlippischer Anzeiger
local stark

Weserbergland Logistik

Weserbergland
CITIPOST
Einfach. Gut. Geschickt.

Medien31

NW CW Niemeyer
Buchverlage GmbH

radio aktiv

Working in partnership with local radio station

DEWEZET

Why pooling

- ✓ Pooling enriches share, reach and position
- ✓ Success of regional print and media groups is strongly related to organization modeling:
 - a) cost efficiency
 - b) increased negotiating power
- ✓ Enables participants for new offer/business development



Understanding Advertising in changing environment

Changing environment => new opportunities

- ✓ Full client service
- ✓ Joint communication services for clients
- ✓ New joint products (niche thematic products, classified buissines)
- ✓ New web products
- ✓ New sales opportunities



Key issues for a successful business model

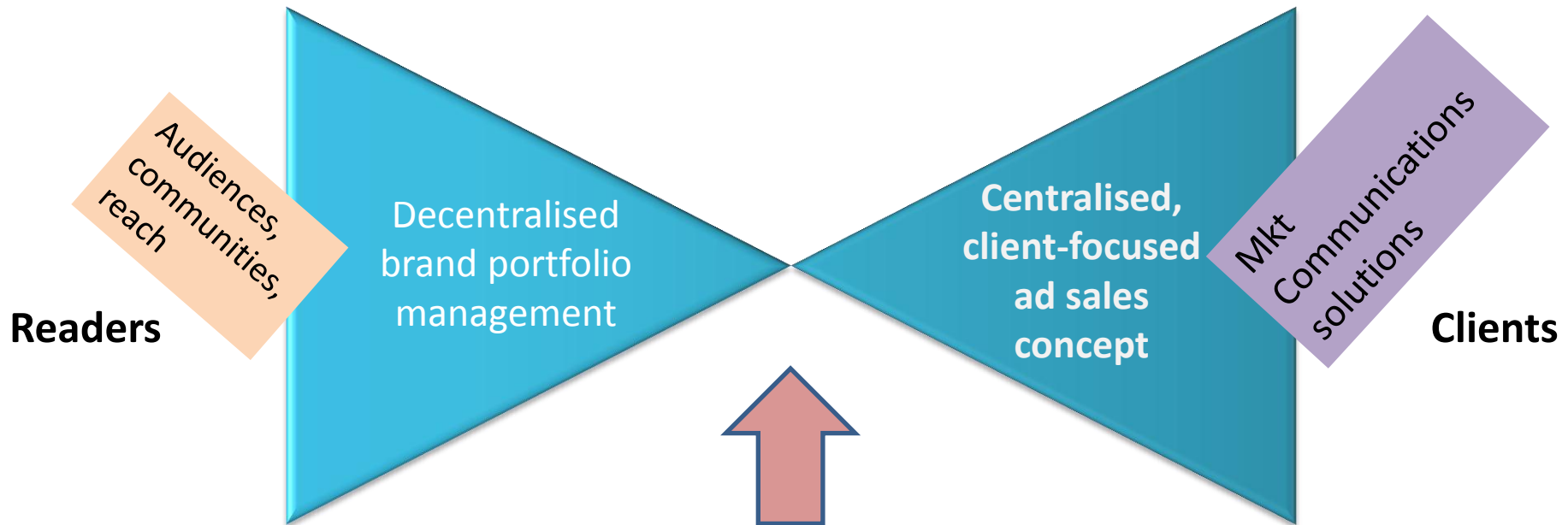
- ✓ Addressing critical issues

- ✓ Organizational changes
- ✓ Unified inventory management
- ✓ Unified sales management
- ✓ Unified CRM
- ✓ Unified metrix
- ✓ Structured and unified offer
- ✓ Multi brand segmentation

- ✓ Frictions solving:

- the sense of lost autonomy; preferences to big brand

The Concept of the Organisation – the case of Delo



Integrative role of Brand Managers as well as of Market Intelligence, and Ad Sales departments

GIACOMELLI MEDIA

THANK YOU FOR YOUR
ATTENTION

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INTENDED TO ORGANISATIONS AT CHANGE.