

MEDIA DONE DIFFERENTLY.

WHO WE ARE



JUSTIN LEBBON

Partner, The Other Lot
Founder, Hubble Media
Founder, Mediatel Events
Investor



SIMON PEEL

Partner, The Other Lot
Head of Media, Haleon
Head of Media, Adidas
Head of Media, 20th Century Fox

THE BUSINESS OF MEDIA

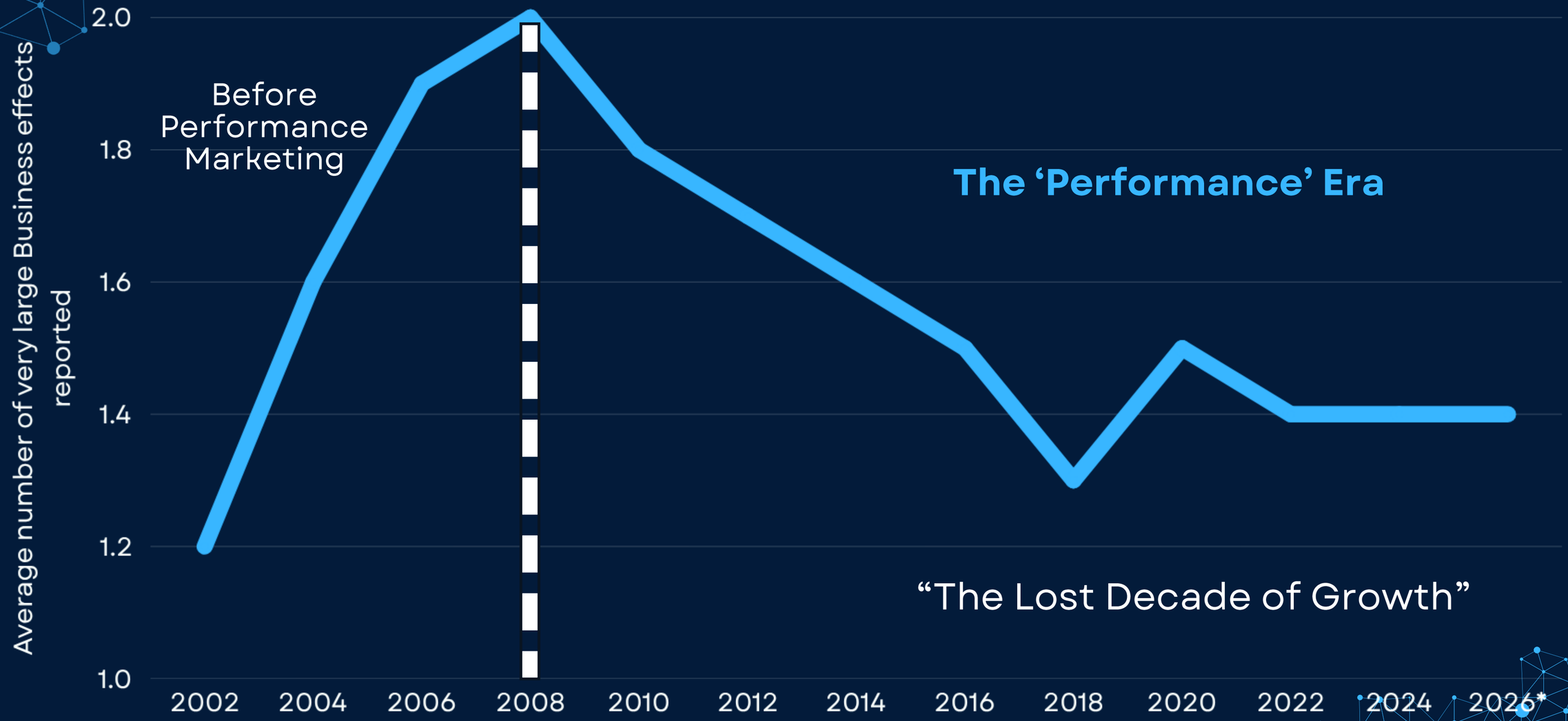
The Power of Trusted Screens

Presented by: Justin Lebbon

ARE WE EFFECTIVE MARKETERS?



PERFORMANCE MARKETING OBSESSION IS KILLING EFFECTIVENESS



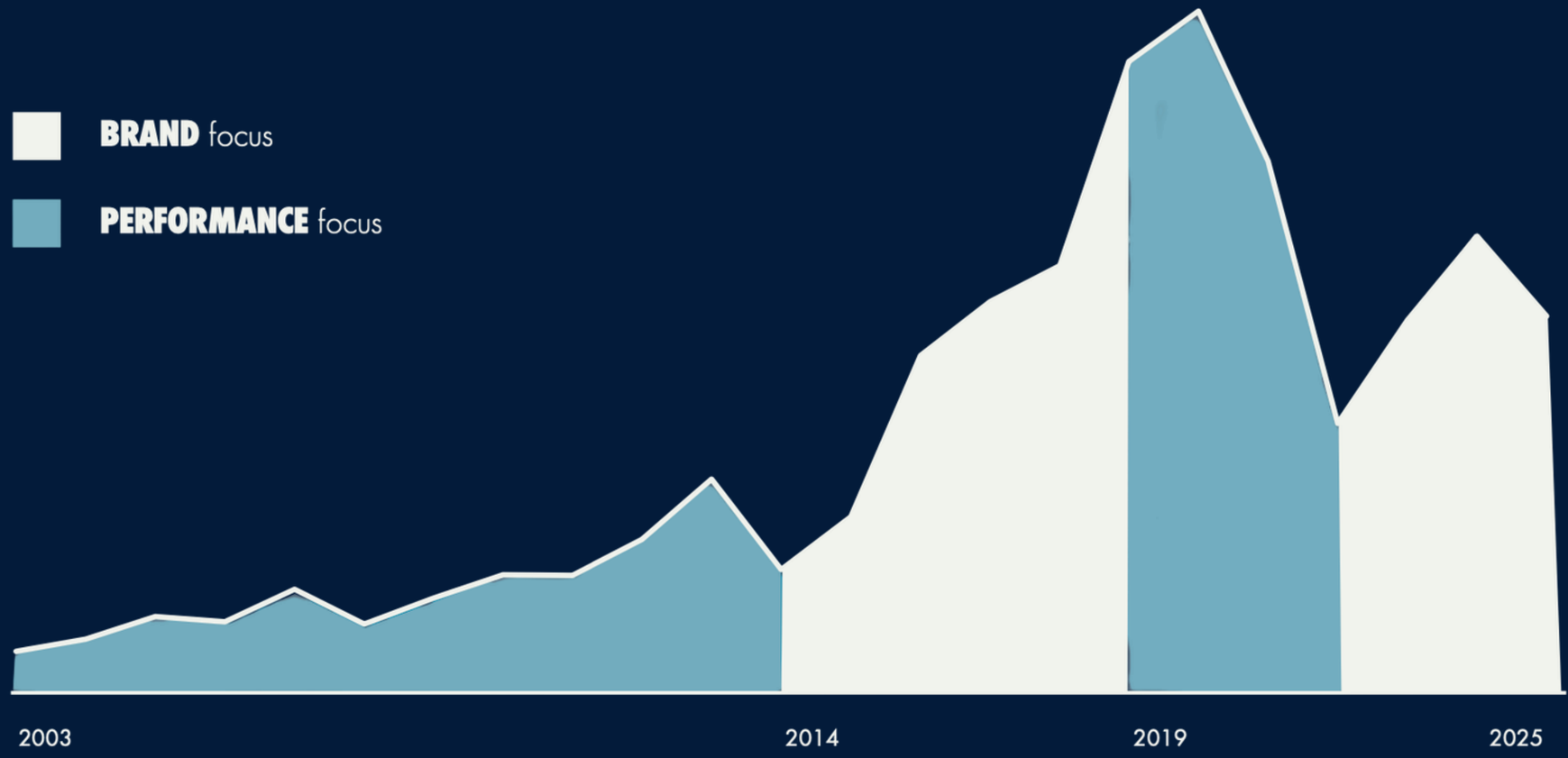
Source: IPA Databank, 1998-2024 for-profit cases. *2026 is projected

TWO BIG EXAMPLES



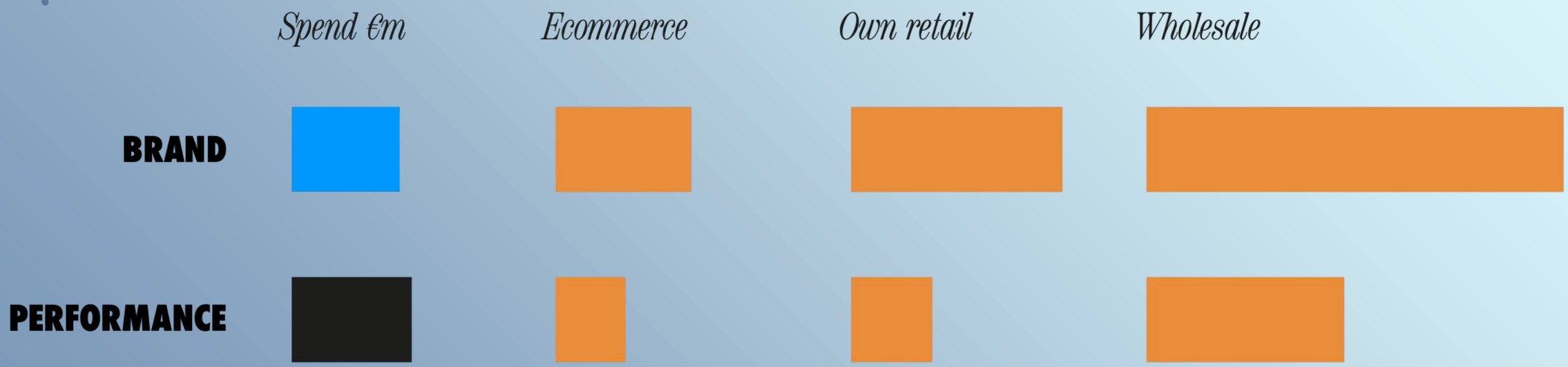
ADIDAS

SHORT-TERMINISM AFFECTED THE BRAND



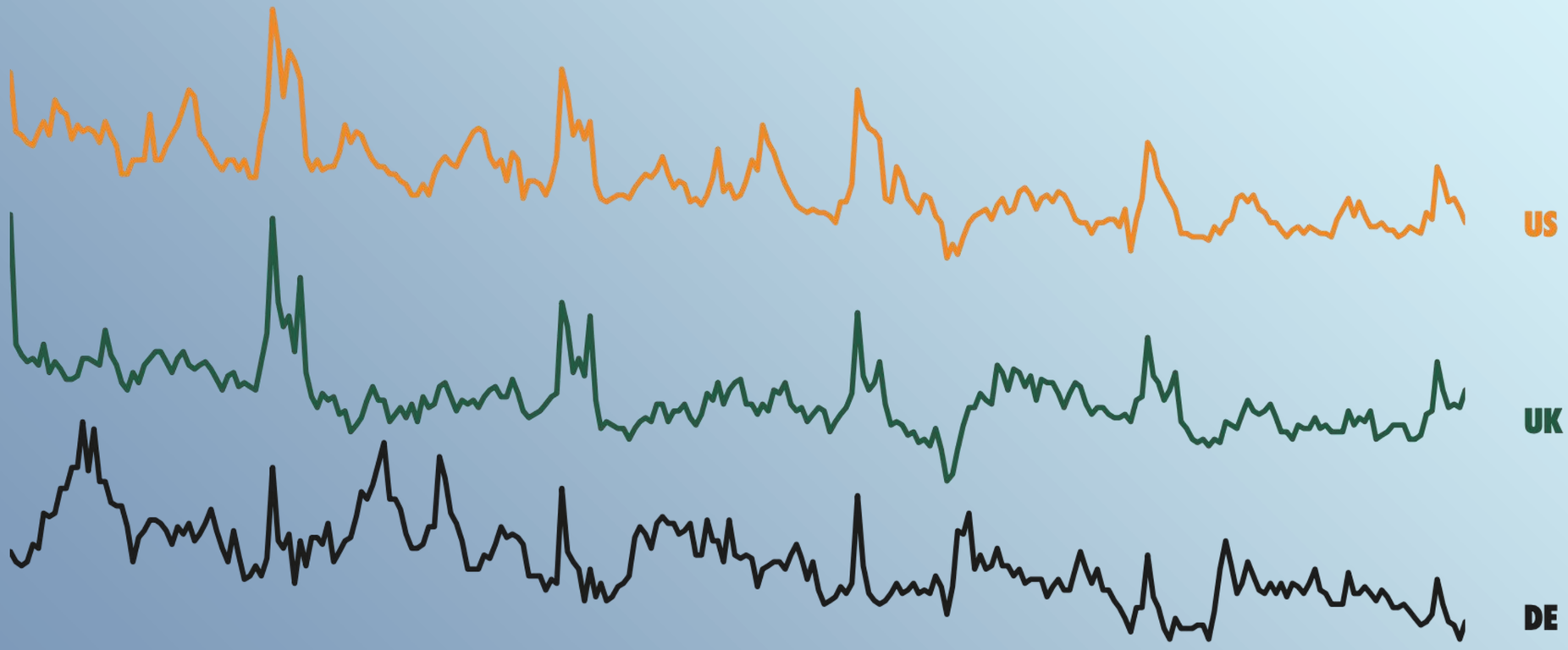
ADIDAS

IMPACT ON SALES

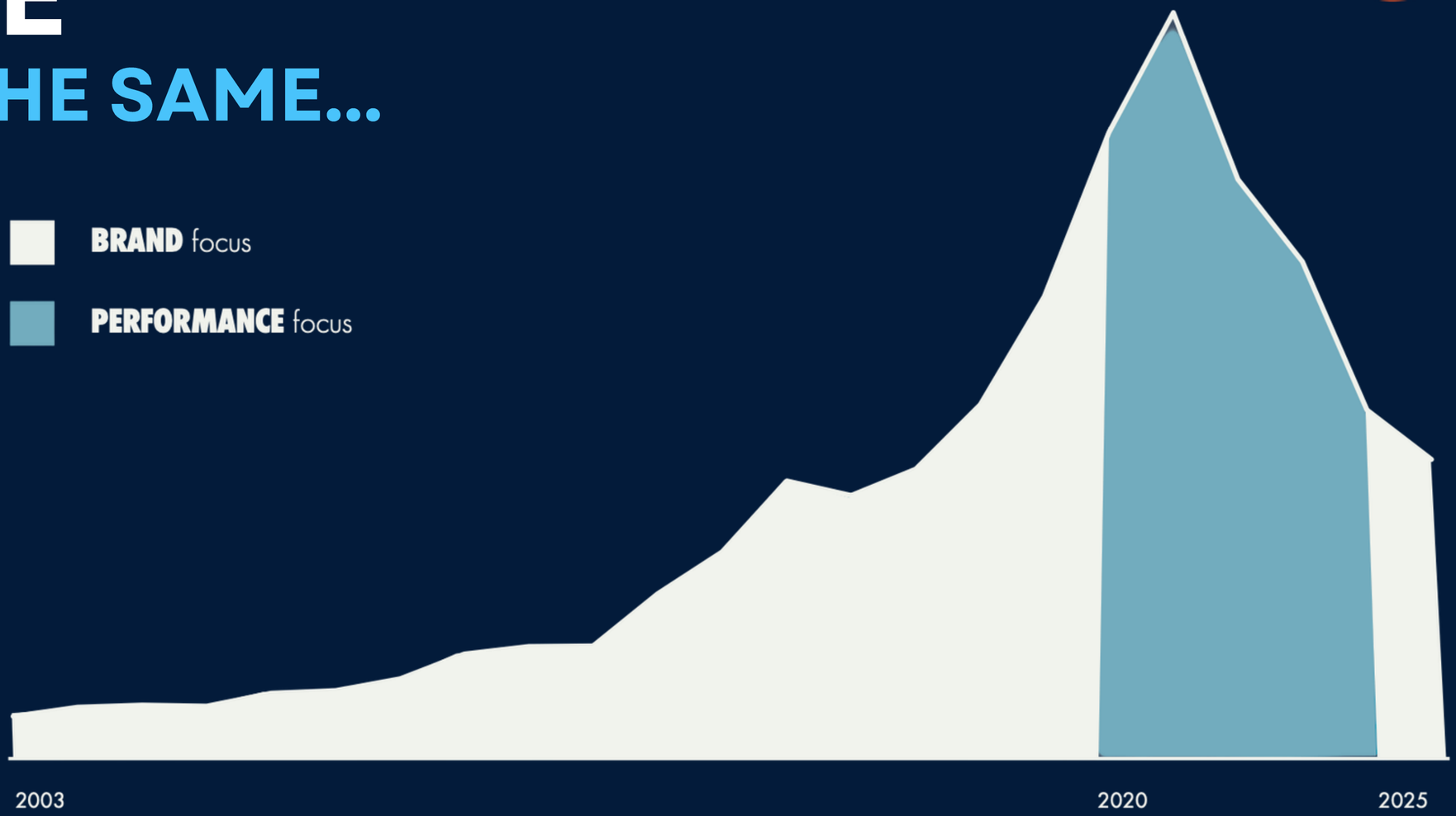


ADIDAS

IMPACT ON SEARCH



NIKE
DID THE SAME...



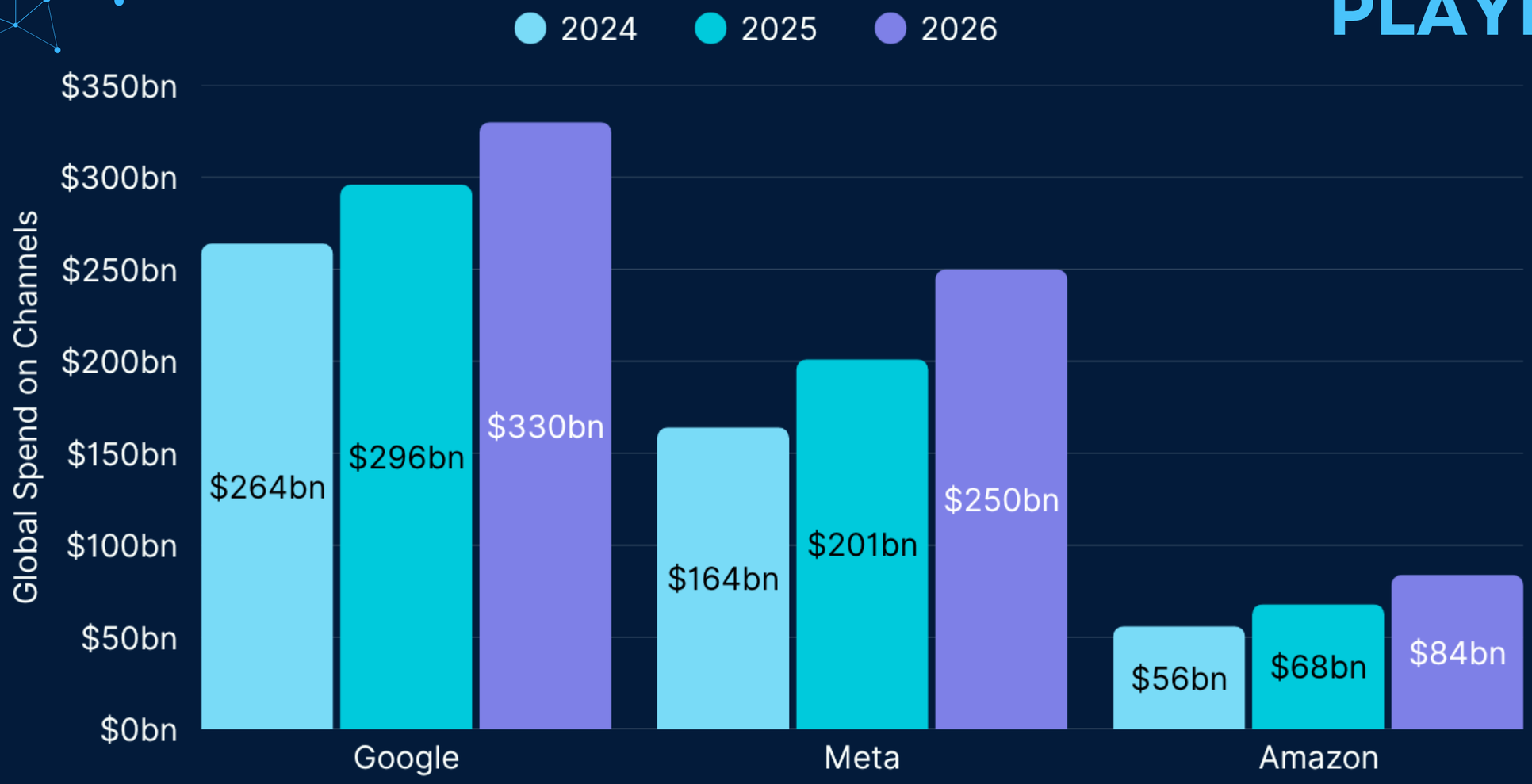
PERFORMANCE GODS



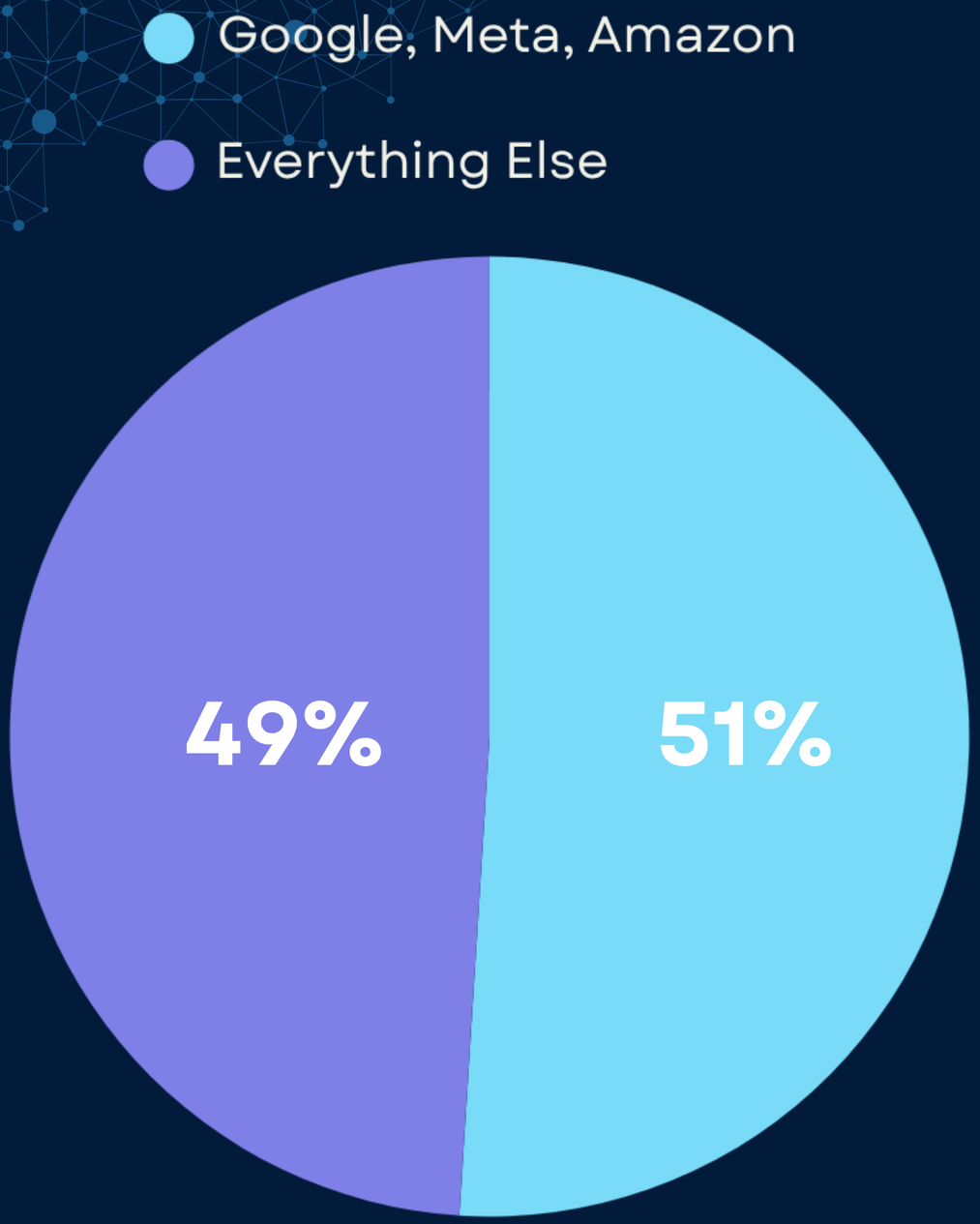




ADSPEND IS DOMINATED BY JUST A FEW PLAYERS



Source: Google, META, Amazon financial reports 2024, 2025 + Statista 2024, 2025 + Madison & Wall 2026 (Forecast)



ADSPEND IS DOMINATED

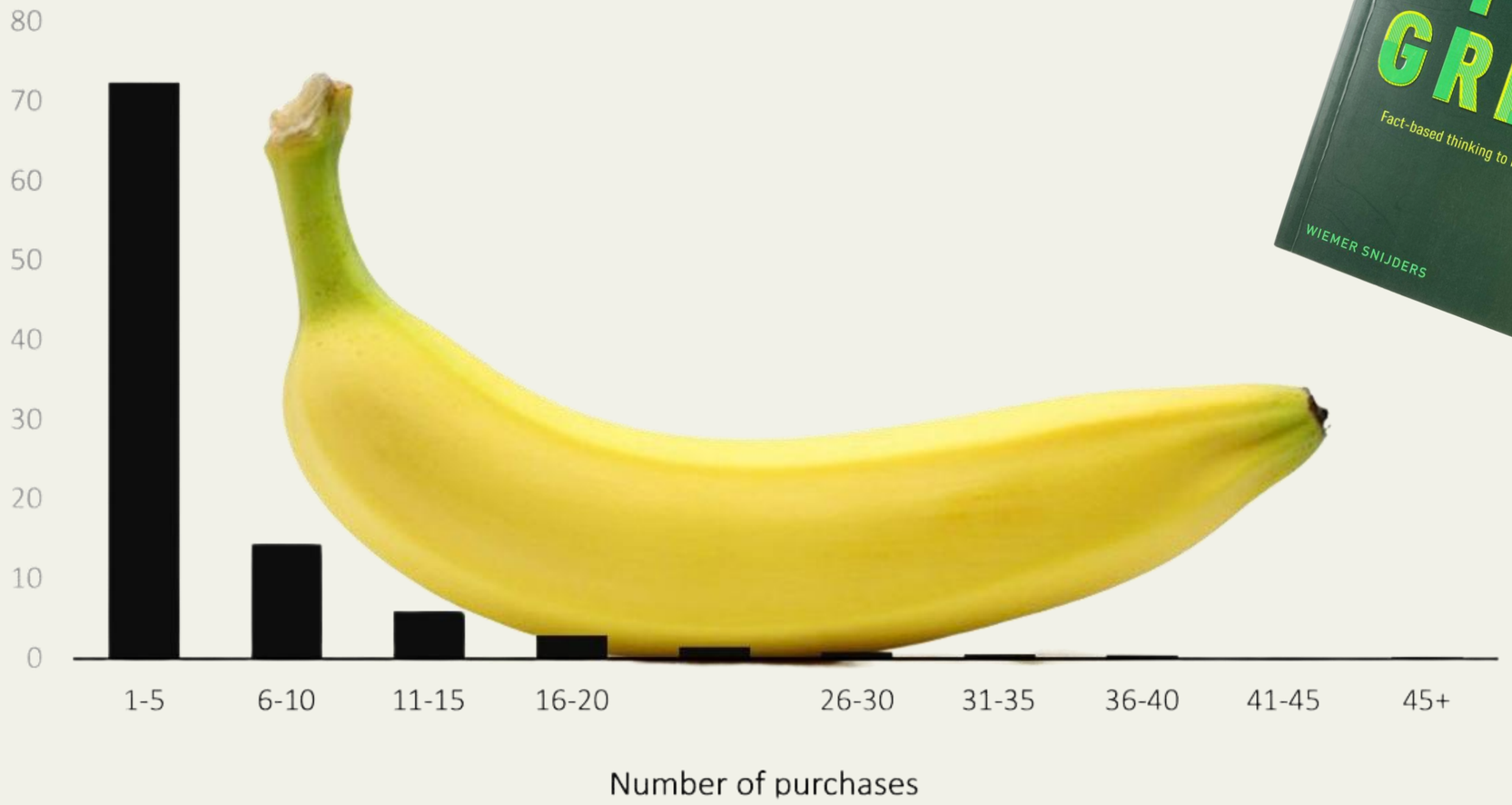
BY JUST A FEW PLAYERS

%Total Global Media Spend

Source: Google, META, Amazon financial reports 2024, 2025 + Statista 2024, 2025 + Madison & Wall 2026 (Forecast)

DESPITE THE EVIDENCE

WE DO THIS...



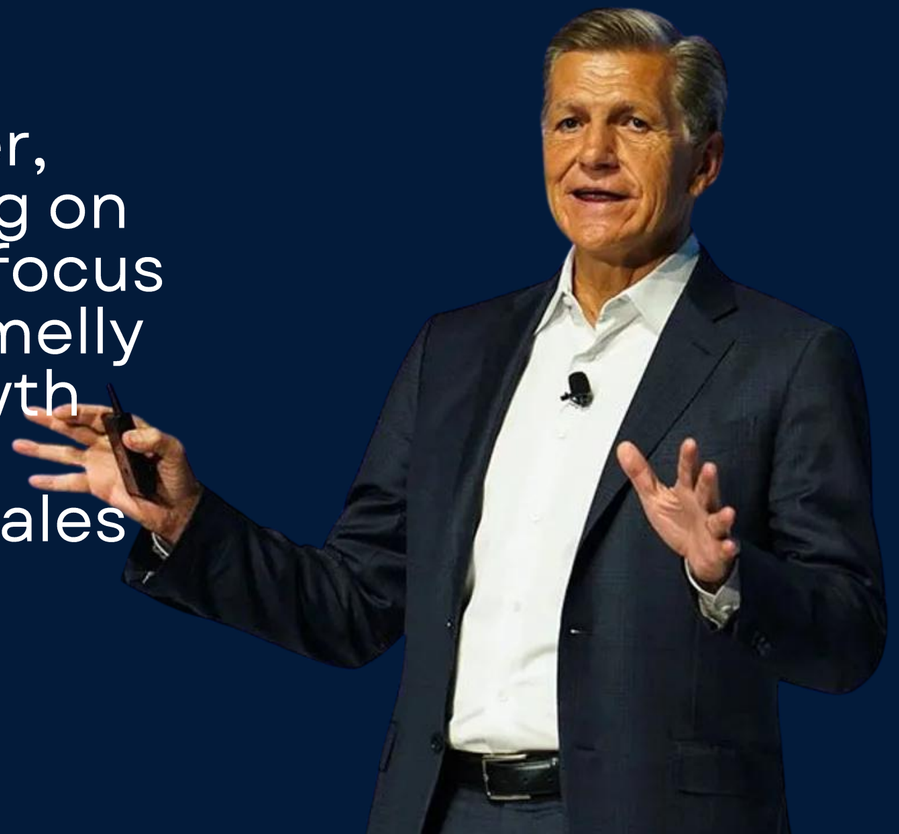


REACH, NOT PRECISION, DRIVES PENETRATION

BUT... IT'S NOT ALL EQUAL

Marc Pritchard, P&G's Chief Brand Officer, famously moved away from hyper-targeting on Facebook after finding that narrowing their focus too much, like targeting "pet owners with smelly carpets" for Febreze, actually stalled growth.

When they went back to "anyone over 18," sales grew.



WHAT IS PREMIUM/QUALITY?

01. Is it in the eye of the beholder?

02. Is it environment?

03. Is it professionally produced content?

04. Is it both?

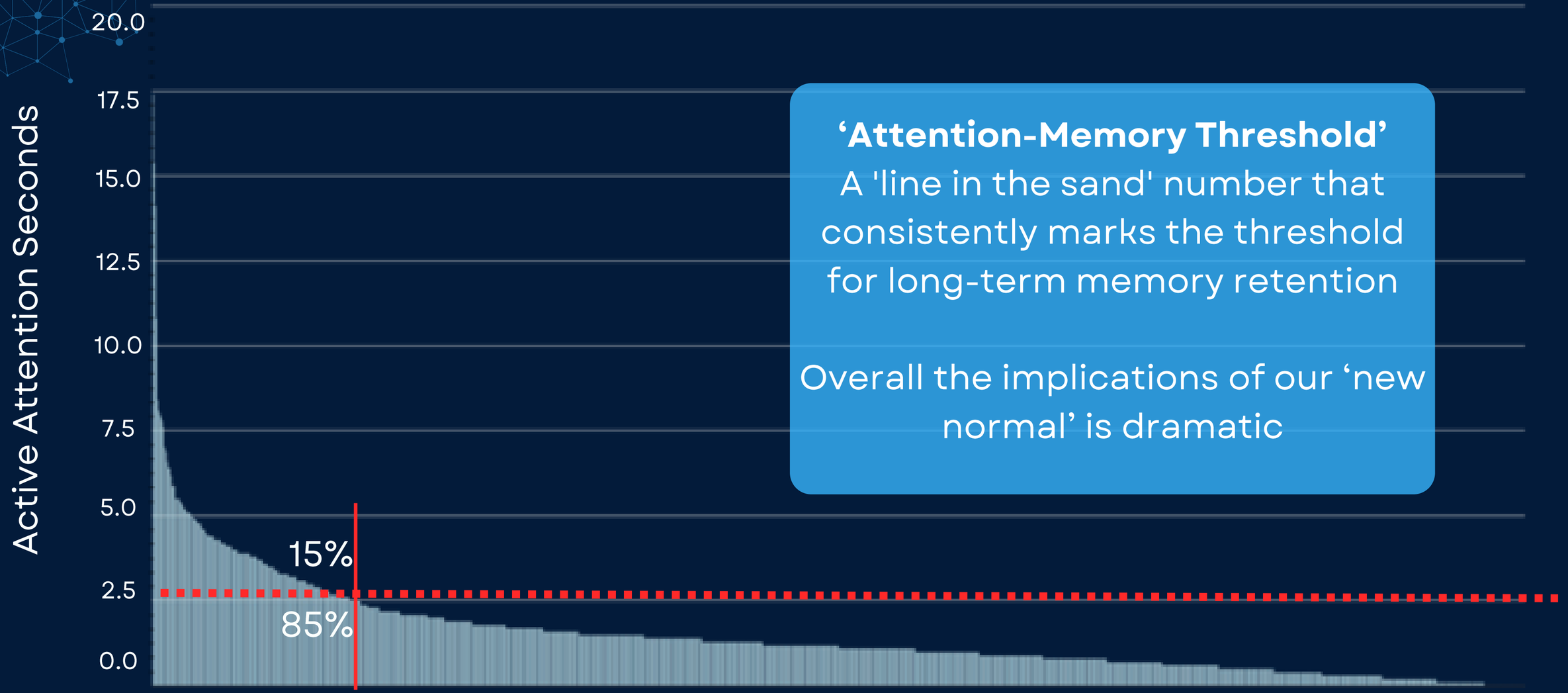
ATTENTION

THE REAL VALUE OF A SECOND



“If you want to grow your brand, you need to hit the threshold.”
KAREN NELSON-FIELD

~85% OF YOUR DIGITAL ADS GET LESS THAN 2.5 SECONDS OF ATTENTION

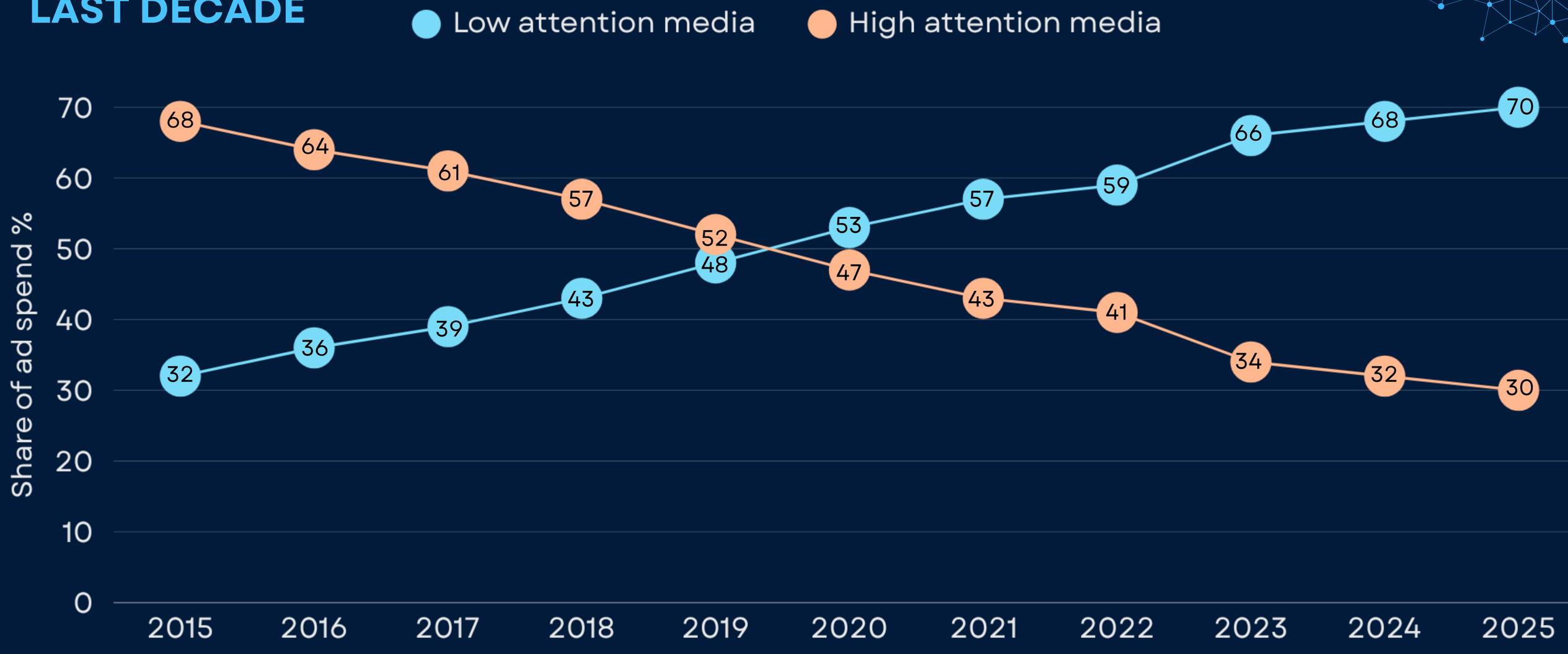


‘Attention-Memory Threshold’
A 'line in the sand' number that consistently marks the threshold for long-term memory retention

Overall the implications of our ‘new normal’ is dramatic

AD INVESTMENT

HAS SHIFTED AWAY FROM HIGH ATTENTION MEDIA OVER THE LAST DECADE



Source: AA/WARC total ad spend for each media (excluding search and direct mail)

TRUST

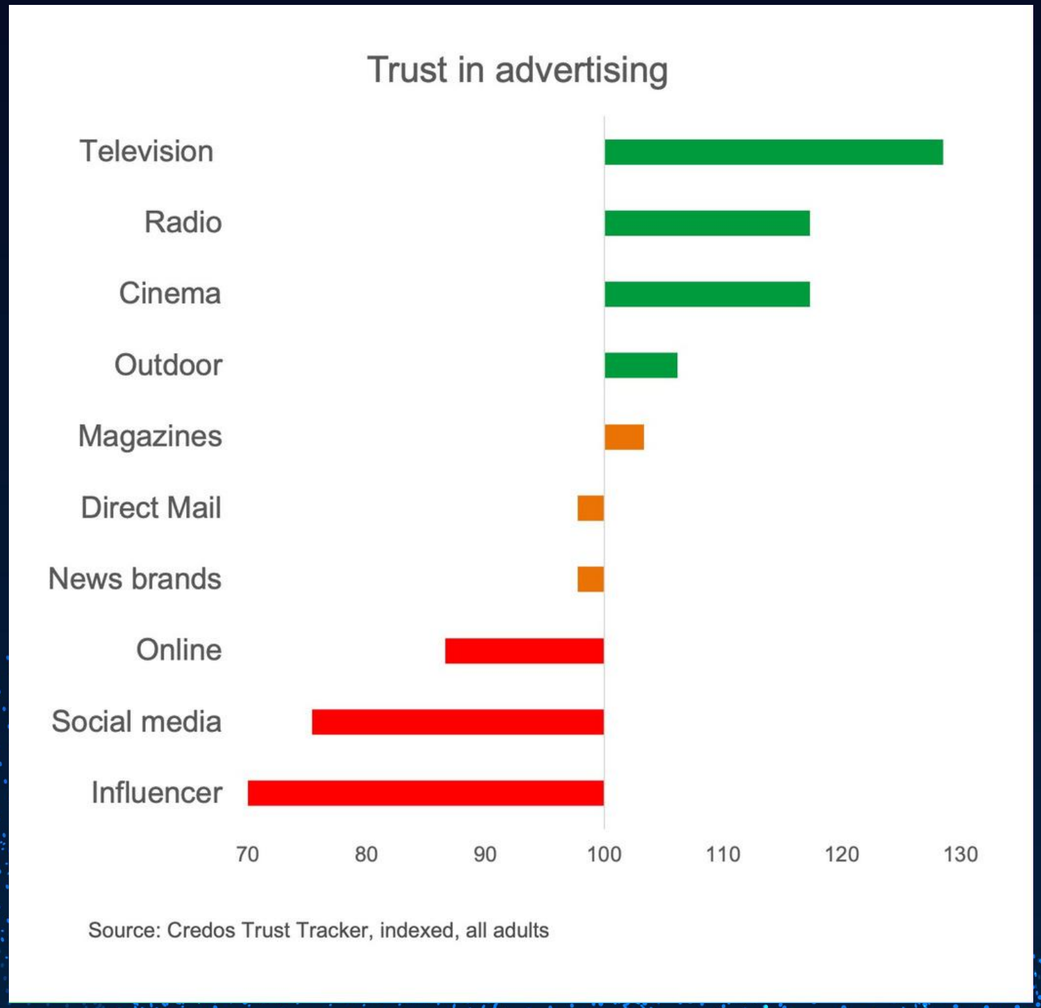
ARE TRUSTED ENVIRONMENTS MORE PREMIUM?



"Advertising that significantly increases brand trust is highly effective at driving business growth."
PETER FIELD

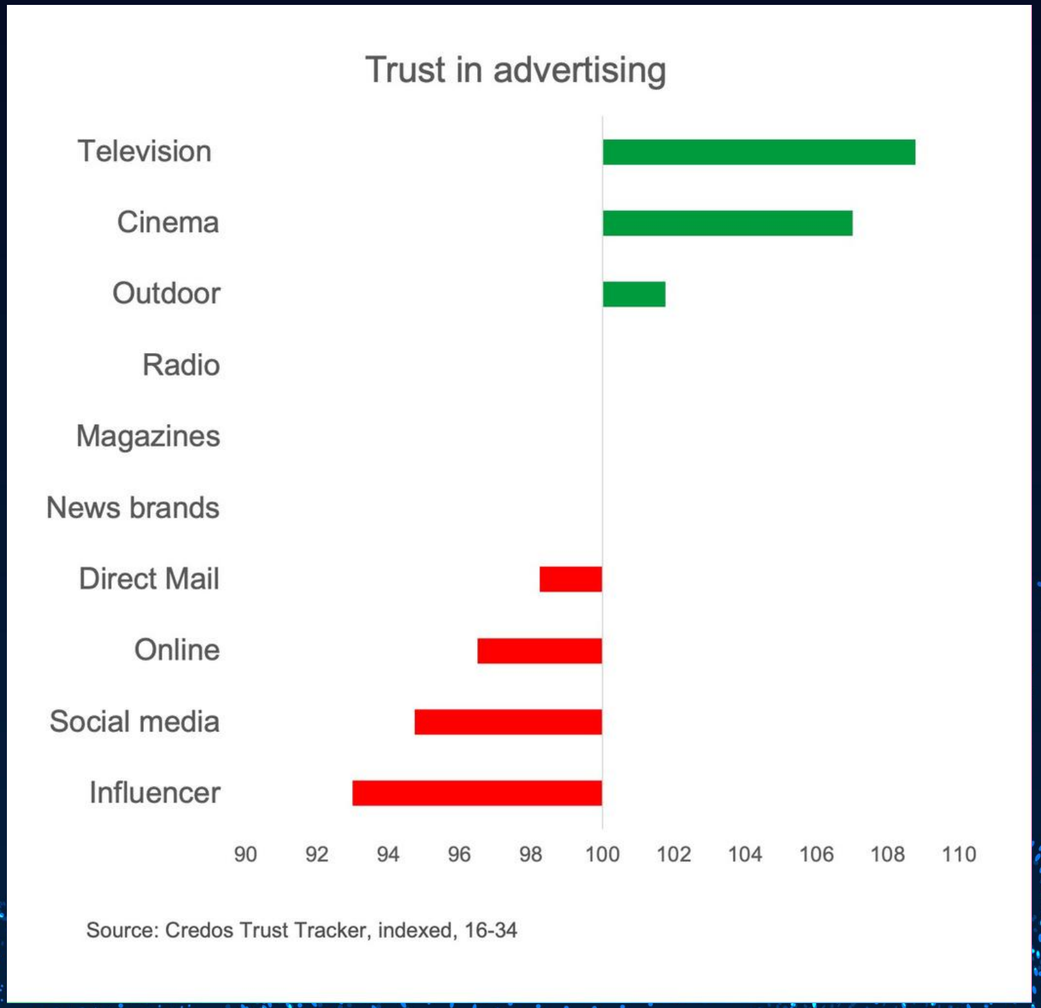
TRUST

2025 DATA: ALL ADULTS



Source: Credos Trust Tracker, indexed, all adults

TRUE FOR 16-34 YEAR OLDS, TOO



Source: Credos Trust Tracker, indexed, 16-34

WHAT'S COMING?



AI SLOP...

01. 1 in 5 YouTube videos is AI Slop
This is a huge problem on Meta, X, and others too

02. These channels rack up millions of views despite the platform's efforts to curb "inauthentic content"

03. AI Slop videos account for around 33% of the first 500 YouTube shorts on a new user's feed

04. Recommendation engines are recommending them, they are free to upload, and they make money

These platforms operate with no transparency

WHAT ABOUT TRANSPARENCY?



Does it matter?



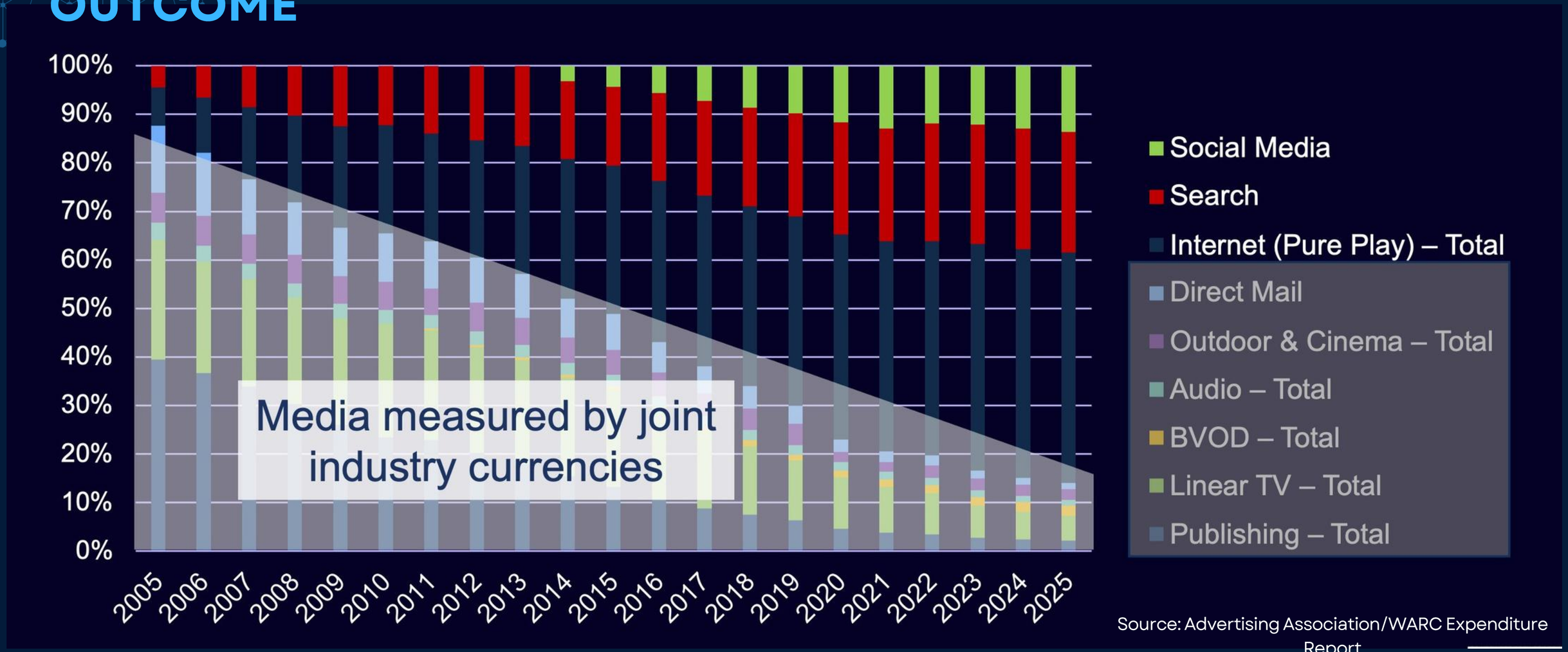
Clients are voting on this with their wallets



Spend through transparent networks is declining

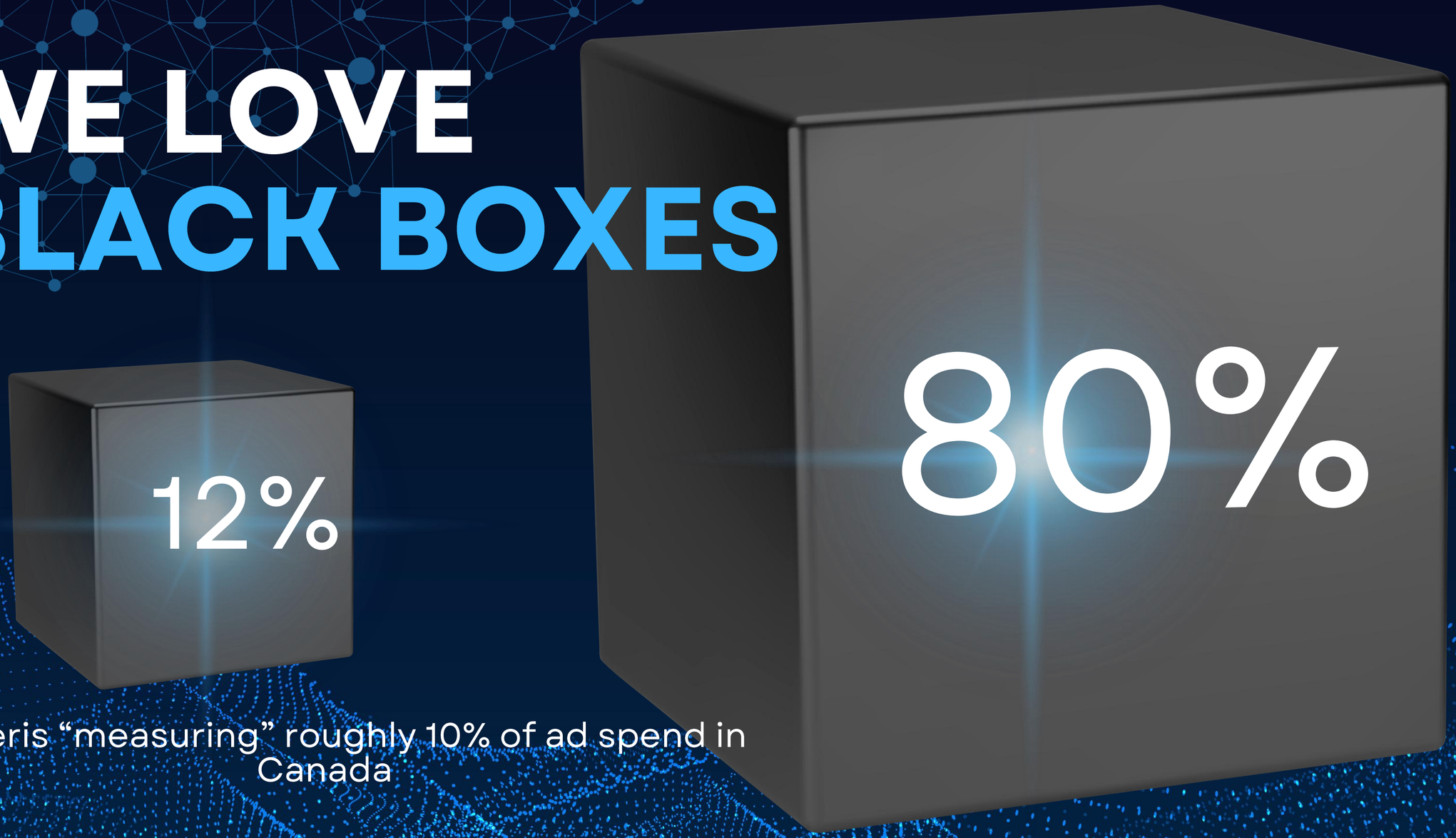
UK MEDIA SPEND:

FROM INDUSTRY DATA ON EXPOSURE TO PLATFORM DATA ON OUTCOME



Source: Advertising Association/WARC Expenditure Report

WE LOVE BLACK BOXES



Numeris “measuring” roughly 10% of ad spend in Canada

DO SCAMS MATTER?

Builds on the narrative of trust

How does your brand look next to scam ads?

Is that premium?

LOOKS HARMLESS?

Dazzling Dolphins · Follow
20h ·

🚨 BREAKING: Miami Dolphins Announce $3.2 Billion Stadium Construction Investment Backed by Major Investors

The Miami Dolphins are preparing to reshape the future of American football with a massive $3.2 billion stadium construction investment.

READ MORE: http://vibetunes.net/breaking-miami-dolphins-announce-32...

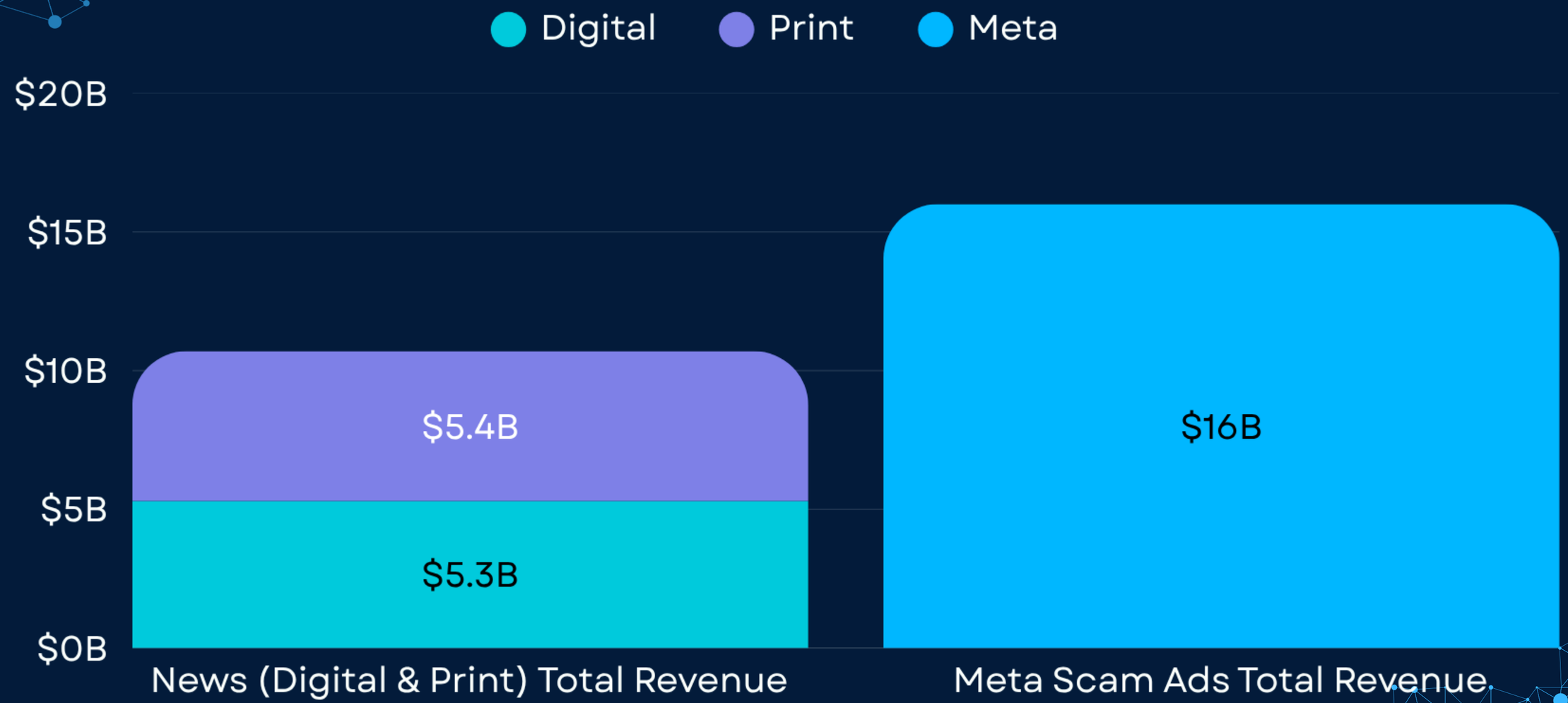
This ambitious project focuses on building a state-of-the-art stadium, complete with a luxury hotel and entertainment district, expanded retail areas, and an exclusive Dolphins legacy experience designed to honor the franchise's proud history while modernizing the fan experience.

This bold construction initiative is already sending shockwaves across the NFL and could establish a new benchmark for sports venues in the modern era. 👇



YOUR BRAND, THEIR SCAM

META MAKE MORE FROM SCAMS THAN GLOBAL NEWS



Source: PwC Global Entertainment and Media Outlook Report, Reuters

WHY CAN'T CANADA BE LIKE THE NORDICS?



BREAKING NEWS

iab.sweden

Work areas Events Gold standard Courses | Jobs & Careers About IAB Sweden Memb

Home / IAB Sweden News / New decision from IAB Sweden's board regarding exclusion case against Meta/News

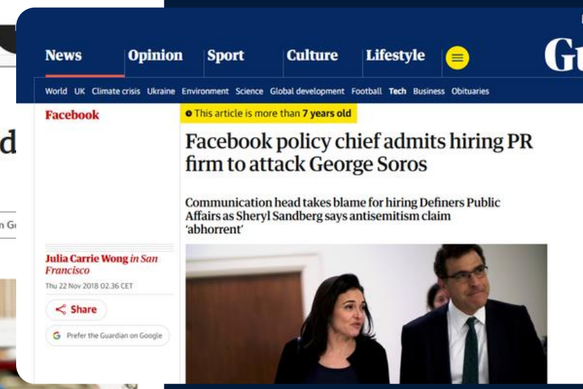
New decision from IAB Sweden's board regarding exclusion case against Meta

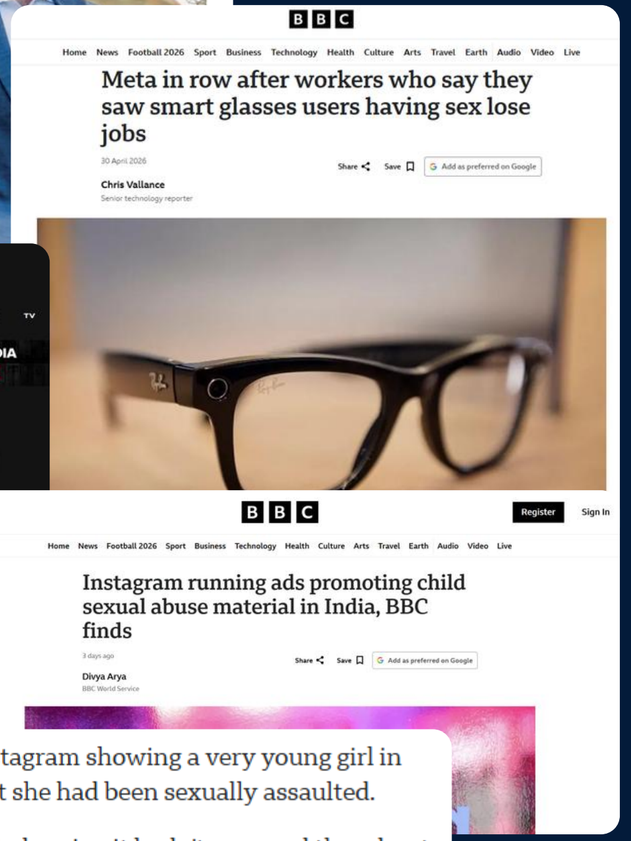


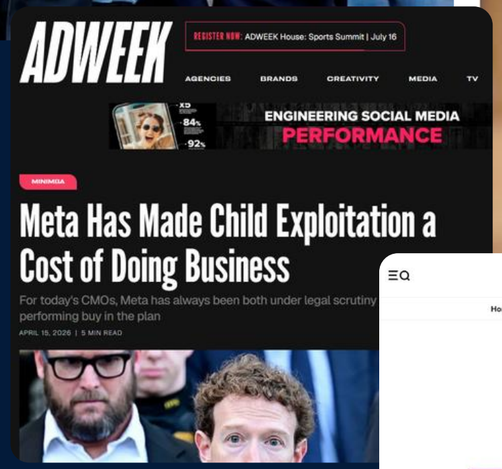
WHY META SUCKS?

- Psychological tests without consent in 2014
- Used for various election interference (2016)
- Algorithms contributed to the genocide in Myanmar (2017-18)
- Cambridge Analytica (2018)
- Data breaches (lots of them – biggest so far in 2021)
- Hired PR agencies to help run smear campaigns against politicians
- The Facebook Papers in 2021
- Meta glasses sending video to Kenya, and planning for facial recognition (2026)
- Promoting child sexual abuse on Instagram in India (2026)









The BBC reported an advert to Instagram showing a very young girl in tears, with wording indicating that she had been sexually assaulted.

But 24 hours later, Instagram replied saying it hadn't removed the advert because "our review team found that the advertiser's ad does not go against our community standards".

MAKING OUR OPTIONS WORSE

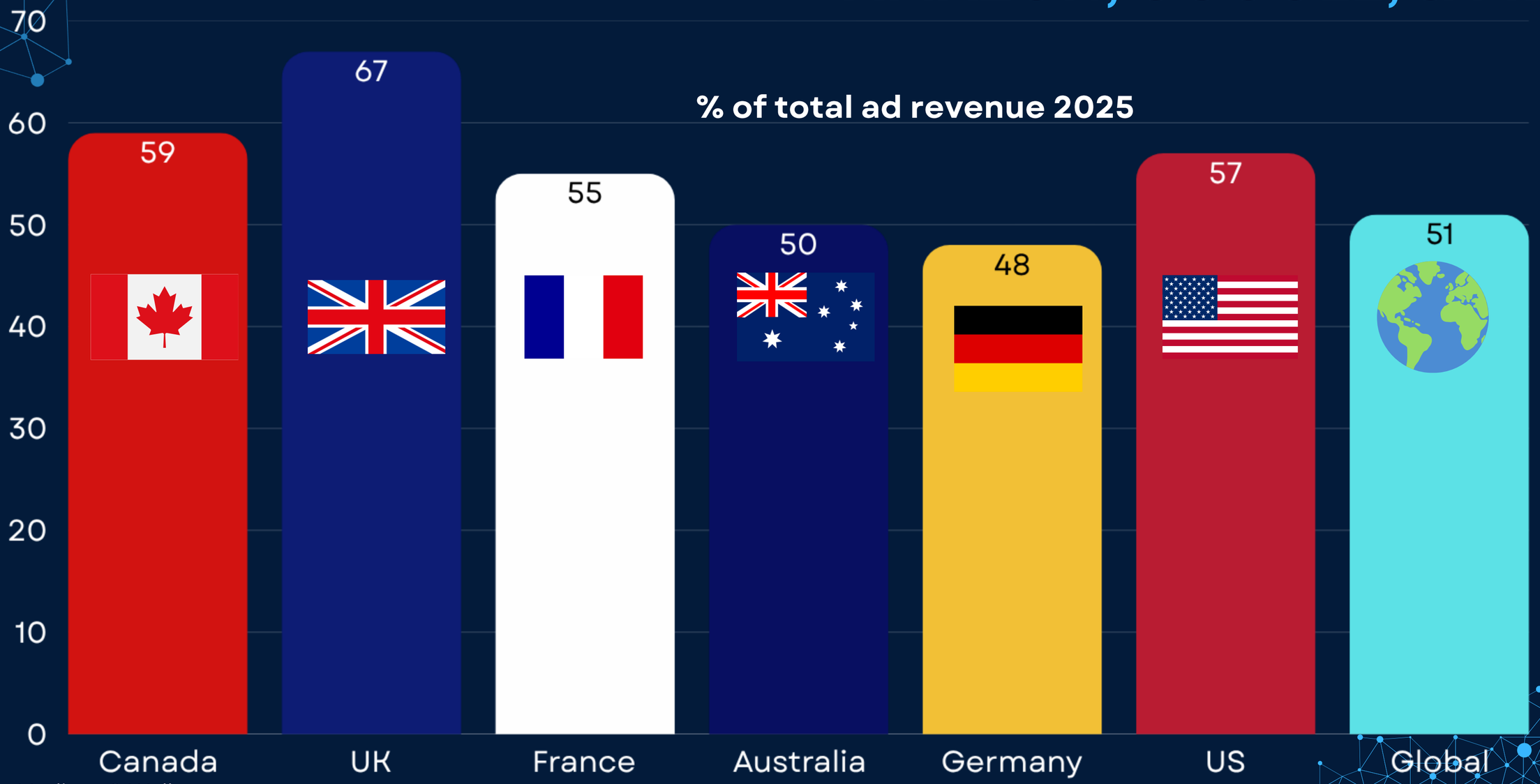
We cannot influence Meta...

- Their auctions
- Their service
- Their terms
- Slow service, if at all
- No brand safety and no feedback on reports of fraud
- “Grading their own homework”

Every krone to the tech oligarchs makes our alternatives weaker



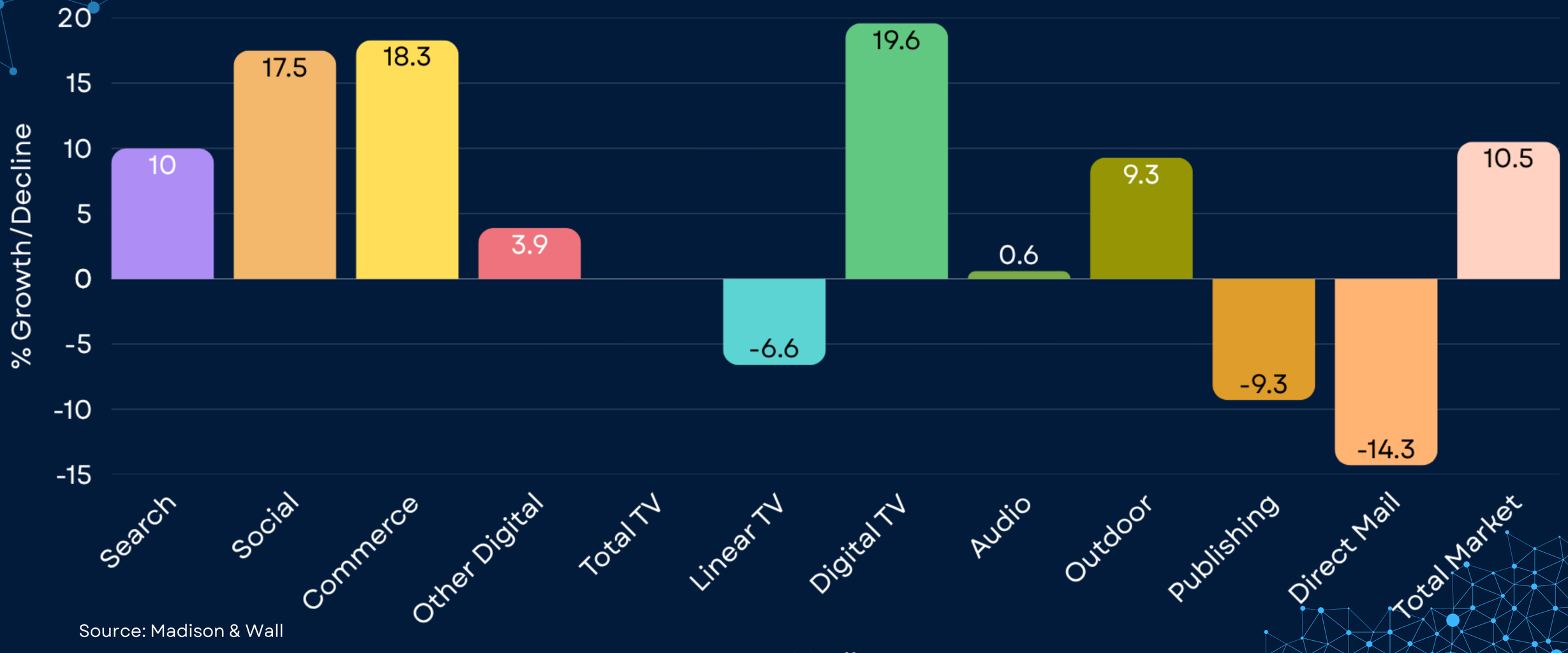
SHARE OF THE BIG THREE
AMAZON, GOOGLE, & META



Source: Madison & Wall

CANADA MEDIA GROWTH & DECLINE

2026 EXPECTATIONS



Source: Madison & Wall

MEDIA'S ECONOMIC CONTRIBUTION:

THE CANADIAN EVIDENCE

- 193,120 jobs (Bigger than auto)
- $22.5bn GDP
- Journalism $1.16bn to GDP

- 2025 - Canadian media 25.8%
- By 2027 it will be 21.3 - downward trend isn't slowing

- 94% digital ad dollars are to foreign entities
- Ad dollars support local content - $1.4bn



THE POINT:

LIMITING YOUR CHOICES

+3% Growth in Canadians' time on social, 2019 to 2025

+119% Growth in Canadian digital ad spend per resident, 2019 to 2025

Digital Ad spend growth is outpacing the economy!

Every dollar to the tech oligarchs makes our alternatives weaker. Local is committed to quality.

CANADIAN CONTENT



US DOMINANCE

72%

...of CTV streaming video advertising revenue in Canada is attributable to US-owned entities.

28%

....to non US owned media companies (Canadian media companies plus ROW)

Source: OMDIA Video Advertising KPI Benchmark Report

ADTECH

DOES A SPRAWLING ADTECH SUPPORT PREMIUM?

THE ADTECH OLIGARCHS

amazon

Year	Revenue
2024	$56.2
2023	$46.9
2022	$37.7
2021	$31.1

‘Amazon Advertising’, includes retail, sponsored ads, programmatic and measurement/analytics

Google

Year	Revenue
2024	$31.1
2023	$31.3
2022	$32.8
2021	$31.7

‘Google Network Revenue’, includes Adsense, AdX, DV360, Admob, Admanager

theTradeDesk

Year	Revenue
2024	$2.4
2023	$1.9
2022	$1.6
2021	$1.2

Gross spend through TTD is $12bn, implying their take-rate is 20.37% (although fees are typically <>10%)

Source: Amazon, Google, TTD, financial reports

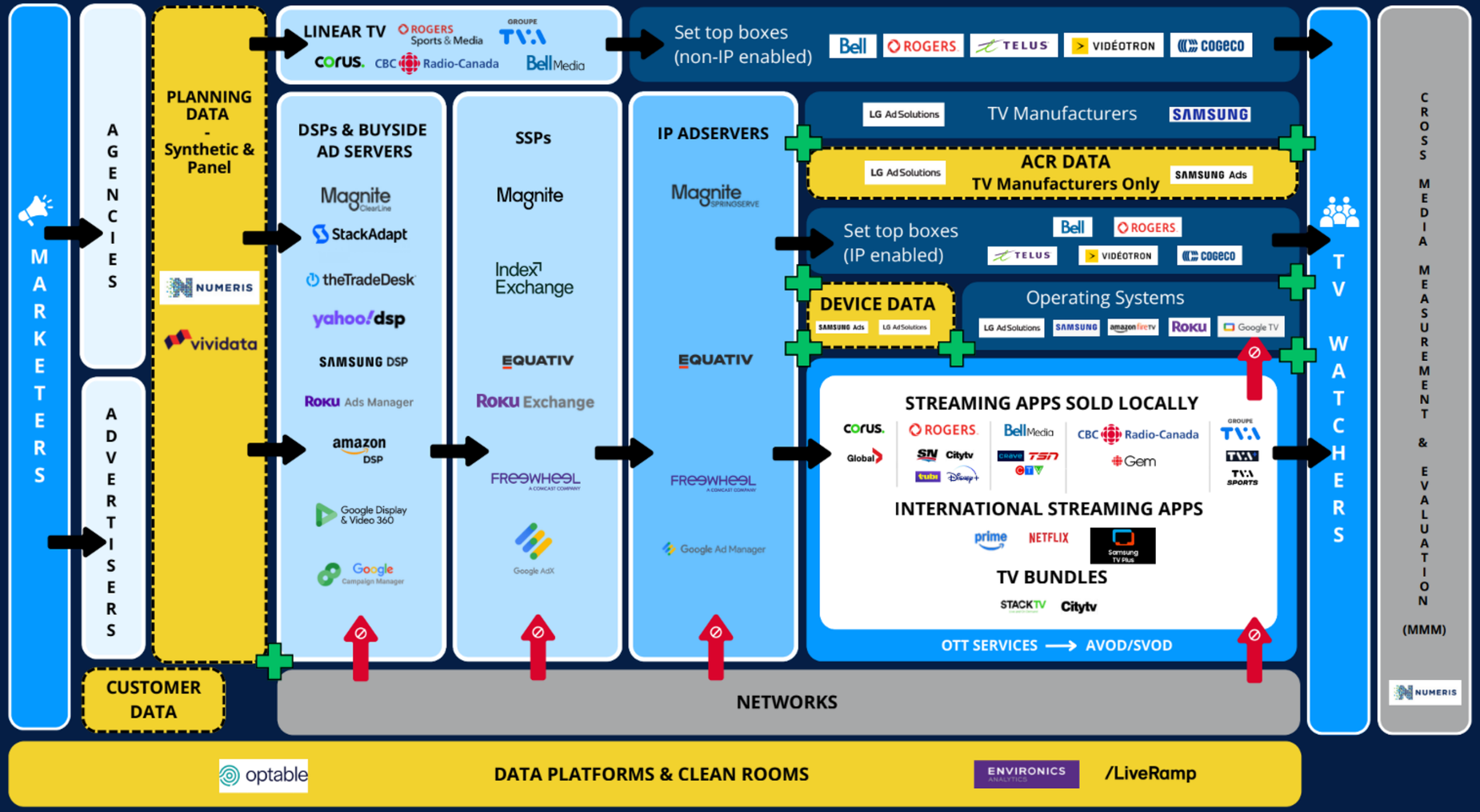
IT'S A RACE TO THE BOTTOM

CLIENT KPI	Cost		AGENCY FEE	DSP FEE	SSP FEE	HOP 1 FEE	HOP 2 FEE	Price	PUBLISHERS
$10	$14	✗	$1	$1	$1	$1	$1	$9	THE GUARDIAN
$10	$13	✗	$1	$1	$1	$1	$1	$8	NYT
$10	$9	✓	$1	$1	$1	$1	$1	$4	Rebate network
$10	$8	✓	$1	$1	$1	$1	$1	$3	MFA network
$10	$7	✓	$1	$1	$1	$1	$1	$2	Arbitrage network
$10	$4	✓	$1	$1	$1	$1	$1	$1	Bundled network

THEORY INTO PRACTICE



THE CANADIAN LANDSCAPE



Source: Corus

IS YOUTUBE TV?



01. Are you sound and moving pictures?

02. Are you often watched on a TV set?

03. Are you often watched with other people?

04. Are you included in any social media bans?

05. Do you host every kind of video, including some tv?

06. Is every show and ad checked by humans before it goes out?

07. Does Ofcom define and regulate you as tv?

08. Are you measured by a JIC - Barb for example?

YOUTUBE VS. BARB

WHAT DID WE LEARN?

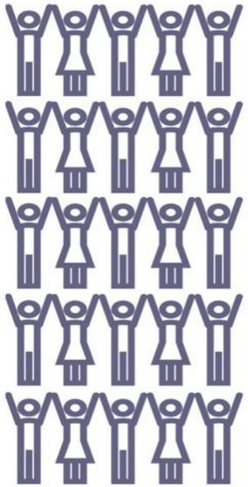


Mr Beast 318,000 viewers in a week...
same as Parliament TV!

YOUTUBE:
HIGH AWARENESS, LOW CONSUMPTION

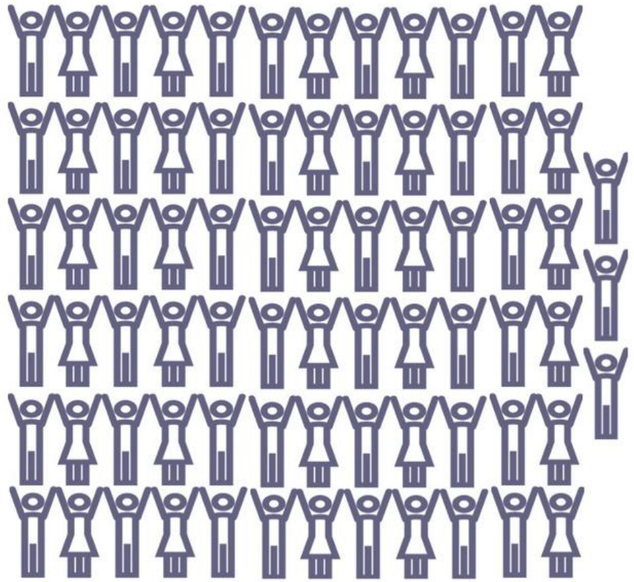
2 hours 1-min per day

Heaviest 25%



6-mins per day

The other 75%

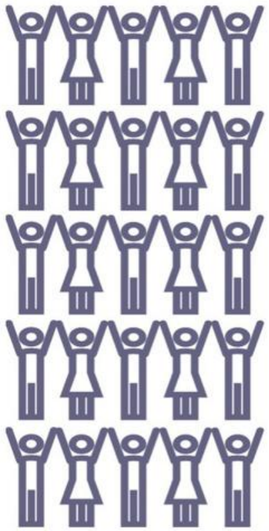


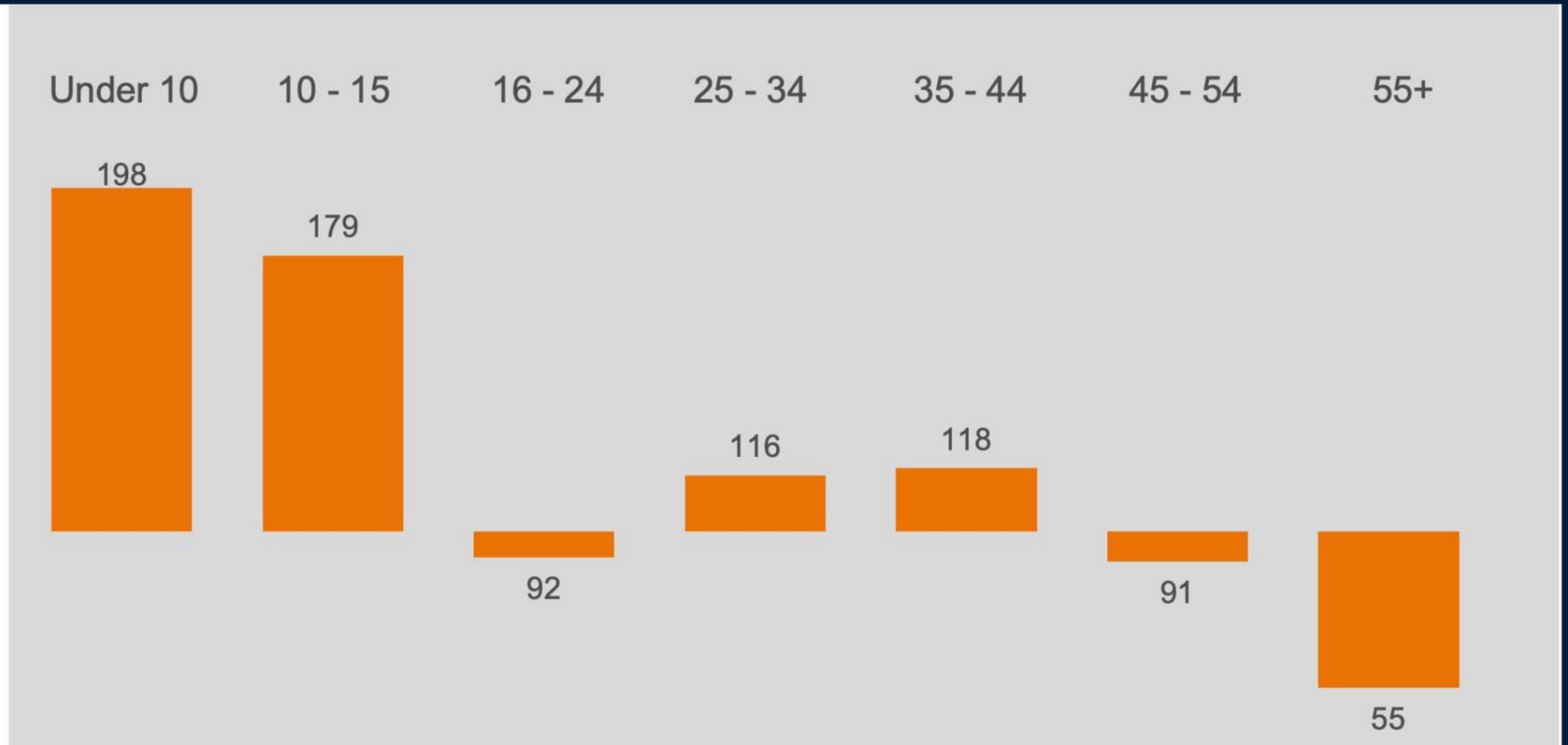
Source: Barb, October 2025, YouTube set viewing split into quartiles

WHO ARE THE YOUTUBE SUPERFANS?

2 hours 1-min per day

Heaviest 25%





Source: Barb, October 2025, YouTube TV set viewing split into quartiles, 4+
Index of heaviest quartiles vs profile of total TV Viewing

KIDS & TRAD TV DOMINATE YOUTUBE

Channel	Reach 000s Ind 4+	Reach % Ind 4+	Share (of total identified via TV) Ind4+	Total weekly minutes on channel (000s) Ind4+	Duration / Exclusivity Indicator
Peppa Pig - Official Channel	758	1.2	0.06%	48,172	B3
Universal Pictures All-Access	562	0.9	0.01%	5,654	B3
JoBlo Animated Videos	537	0.9	0.02%	12,330	B3
Moonbug Kids - After School Club	414	0.7	0.02%	15,298	B3
Bluey - Official Channel	356	0.6	0.02%	14,161	B3
MrBeast	319	0.5	0.01%	7,911	A1
Blippi Toys	310	0.5	0.01%	5,842	B2
Blippi - Educational Videos for Kids	279	0.5	0.01%	8,339	B2
IGN	258	0.4	0.01%	7,381	C3
Danny Go!	233	0.4	0.00%	3,499	A1
Sheriff Labrador - Kids Cartoon	229	0.4	0.02%	12,319	B2
Super Simple Songs - Kids Songs	223	0.4	0.03%	27605	B2
Warner Bros Entertainment	210	0.3	0.00%	3,268	A2
Baby Shark - Pinkfong Kids' Songs & Stories	186	0.3	0.01%	7,548	B2
WWE	159	0.3	0.00%	3,676	C3
BabyBus - Kids Songs and Cartoons	156	0.3	0.00%	3,750	B2
Sony Pictures Entertainment	138	0.2	0.00%	1,400	B2
Ben and Holly's Little Kingdom - Official Chanr	127	0.2	0.00%	1,974	B3
CoComelon JJ's Animal Time - Nursery Rhyme:	124	0.2	0.00%	2,605	B3
MeidasTouch	114	0.2	0.01%	4,517	C1

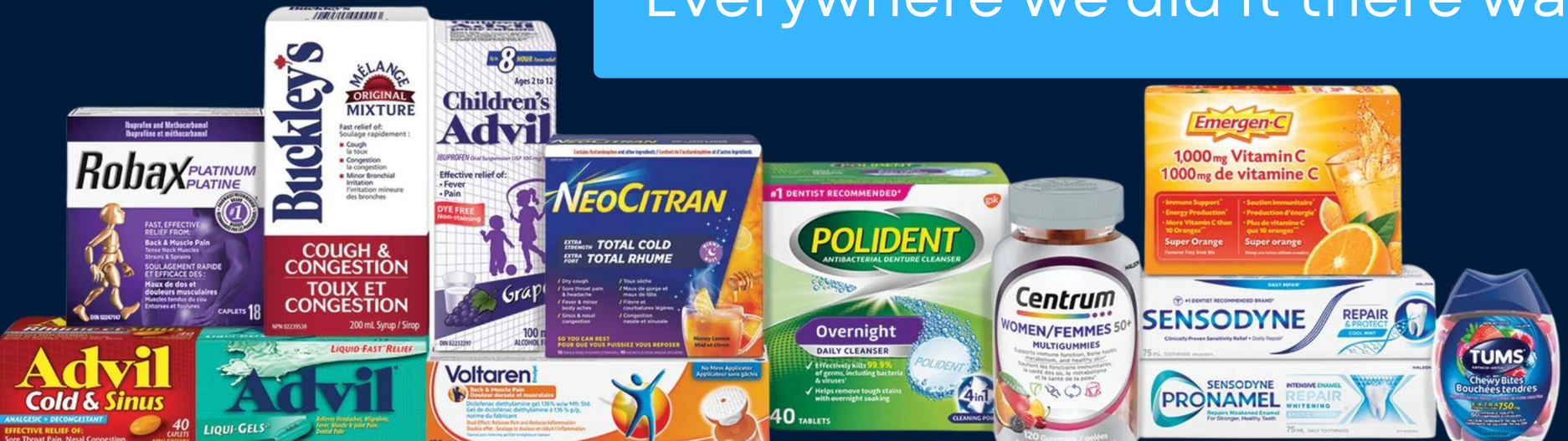


Source: UKOM endorsed data for PC, Tablet, and Smartphone in Ipsos iris, December 2025,
All aged 15+ years using PC/Laptop, Smartphone, or Tablet Devices in a month

GET ON WITH IT, DOES IT WORK?

Sales rose in 9 consecutive quarters

“Everywhere we did it there was a rise in sales”



SUMMARY

Trust, attention, context, and **transparency** matter to growth

Not all **reach** is equal

Stop buying crap...
It hurts Canadians, the economy, **effectiveness**, and makes your alternatives weaker