



# MEDIA LANDSCAPE EVOLUTION

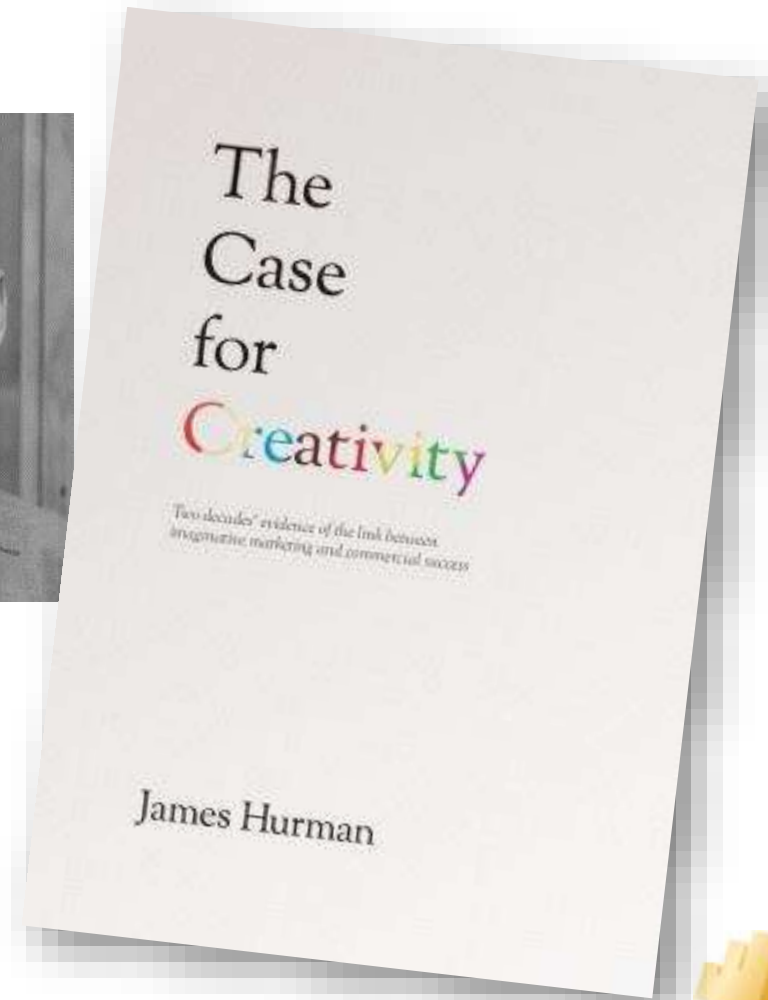


Bruno Liesse, 23-04-2020

# CHANNEL, CONTENT, CONTEXT? RELEVANCY.

James Hurman

*"Nobody reads advertising.  
People read what interests them,  
and sometimes it's an ad."*



SOURCE : CANNES LIONS EFFECTIVENESS JURY



# OBJECTIVES

Understand the role of the media (**touchpoints**) in a coms' strategy

- How they work and their **limits**
- Update about **trends** **media scene attached**
- New models of **touchpoints** planning





# INTRODUCTION

Everything changes, so does media planning

# THE MACRO CONTEXT

(that is VUCA for sure)



# CHANGES MAKE ADVERTISING MORE COMPLEX

- Exponentially **broader** touchpoints **choice**, tending to chaos
- **Filtering audiences** = resistant vs pushy ads
- Business pressure making the **balance brand / business** a challenge



WE NEED EFFICIENCY AND  
EFFECTIVENESS  
MORE THAN EVER

# ALERT OF THE CONGRESS



*77% of brands could disappear tomorrow  
and no one would care  
(81% in Europe)*

Meaningful Brands, Havas Groupe

*How to improve the **efficiency** of what we do (in the marcom' industry and our job)*

*And in the meantime **please** to the audience*

**Both are binded.**



*If it's not true for the  
people, it's not valid.*

**NOW LET'S SPEAK ABOUT  
MEDIATIZATION**

# CONCRETE BASIS OF A NEW MODEL

~~Strategic model~~

- ~~Push-pull~~



- Focus on the **Conversion Funnel**

~~Tactical Planning~~

- ~~'Campaigning'~~



- Establish **ecosystems**

~~Measurements & iteration~~

- ~~Per action and source~~
- ~~No ROI tracking~~



- **Integrated results** incl. **ROI**

**This is the key shift**

# HAVE WE DONE DURING DECADES ...

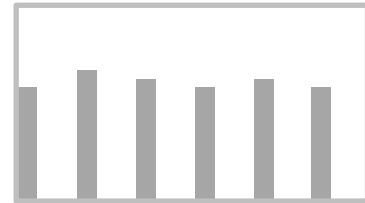


... INAPPROPRIATE CARPET BOMBING?

# HOW PHASING LOOKED LIKE - OLD MODEL (TIME)



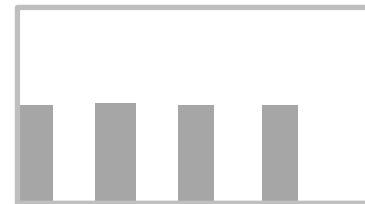
▶ continuous



▶ pulse



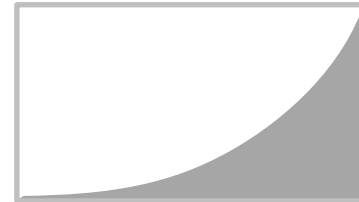
▶ take-off and  
cruise



▶ light flights



▶ heavy flights



▶ viral



▶ burst

# OLD MEDIA PRINCIPLES CHALLENGED

## 1. Coverage

Reach a maximum  
of individuals at  
least once

Reach right people  
a proper way and  
get data from them

# OLD MEDIA PRINCIPLES CHALLENGED

## 2. Selectivity

Primarily reach  
the (core) target  
group

No idea of our core  
target (influencers?)  
but please engage

# OLD MEDIA PRINCIPLES CHALLENGED

## 3. Repetition

Maximise the repetition of the message

Define the right cap for touching people efficiently

# OLD MEDIA PRINCIPLES CHALLENGED

Buy at the  
lowest  
cost/contact

Justify the spending  
by return evidences  
(of all kinds)

**4. Cost**

# REEVALUATING MEDIA

## Most important attributes of an advertising medium



Q. Which of these four attributes is most important and which is least important in delivering campaigns that grow your/your clients' business in the longer term? Base: n=103

# WHAT HAS CHANGED IN MEDIA PLANNING 2.0?

- From time to space – **Ecosystems**
  - Effective 360, called **Bought Owned Earned**
  - Touchpoint **surveys & tpoint** tools
  - **Various** : creativity, content, partnerships, data, social & search
- ... No more borders



**And : DIGITAL ?**



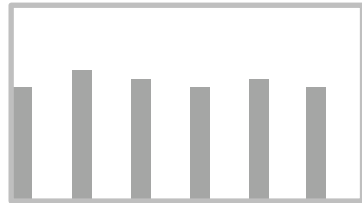
# A NEW APPROACH

Structuring chaos and fighting against intuitive & me-marketing

# PHASING - THE NEW MODEL (TIME IRRELEVANT)



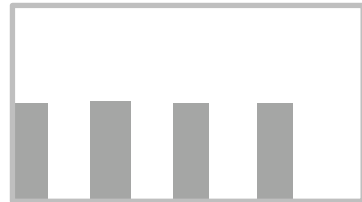
▶ continuous  
*'Always on'*



▶ pulse



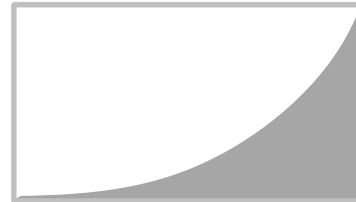
▶ take-off and  
cruise



▶ light flights



▶ heavy flights



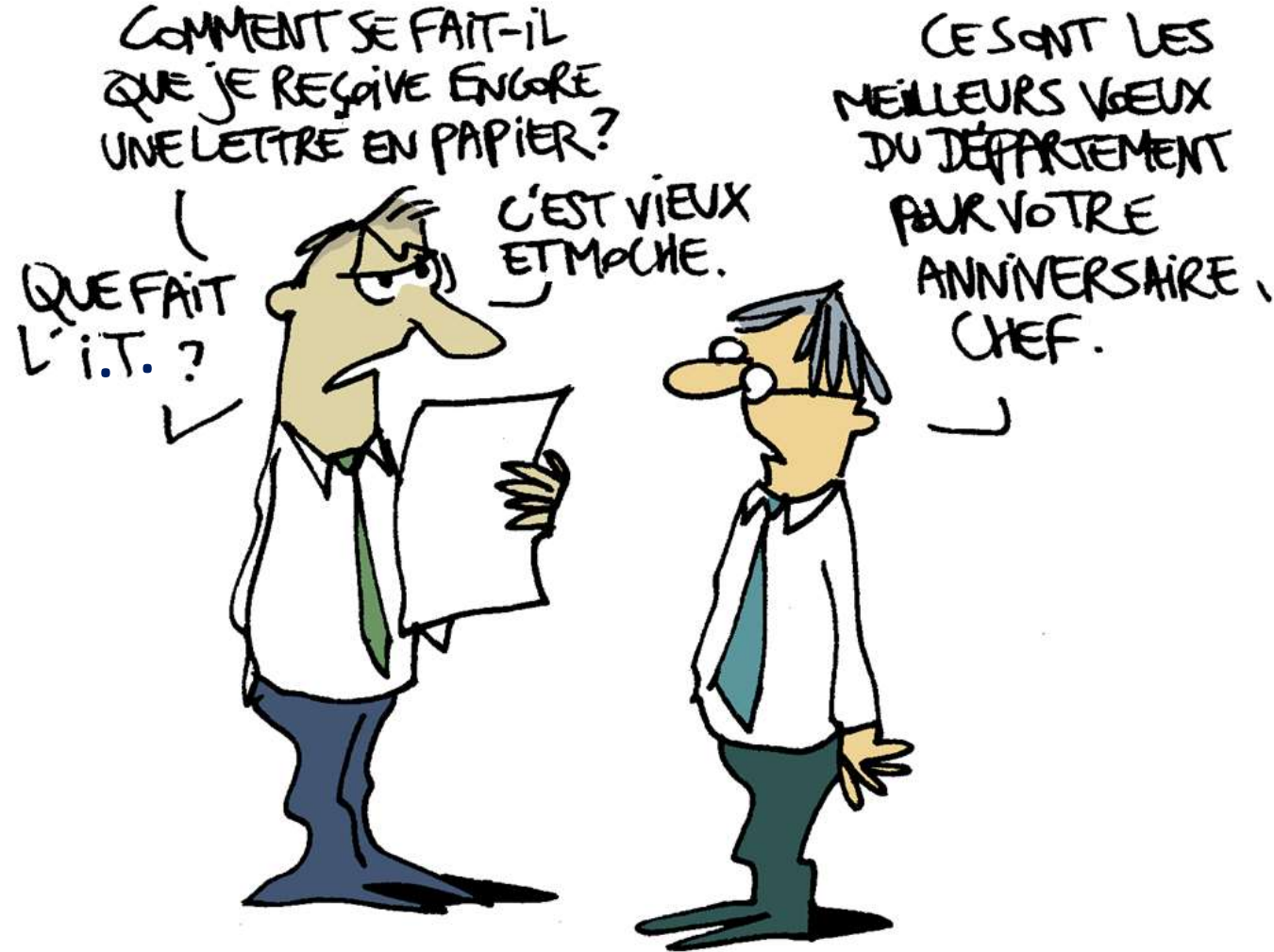
▶ viral



▶ burst

# CHOICE : THE POINT IS NOT TO TEST NEW TECHS' BUT TO BE RELEVANT





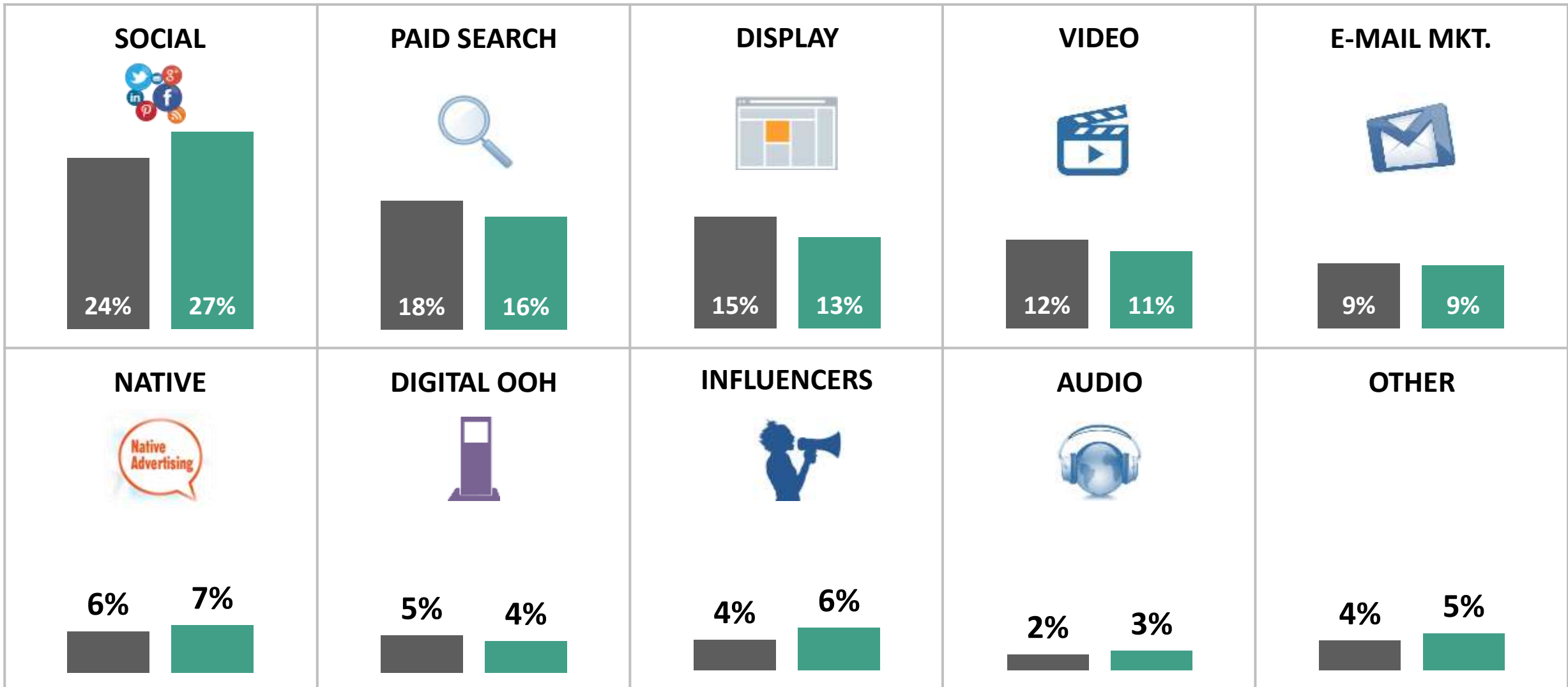
# THE MATRIX SURVEY

BAM / IAB  
(NO NEUTRAL SOURCE)



■ Advertisers (n=267) ■ Agencies (n=207)

*How is the budget you spend on digital channels divided into the following formats? / % clients who use that format.*

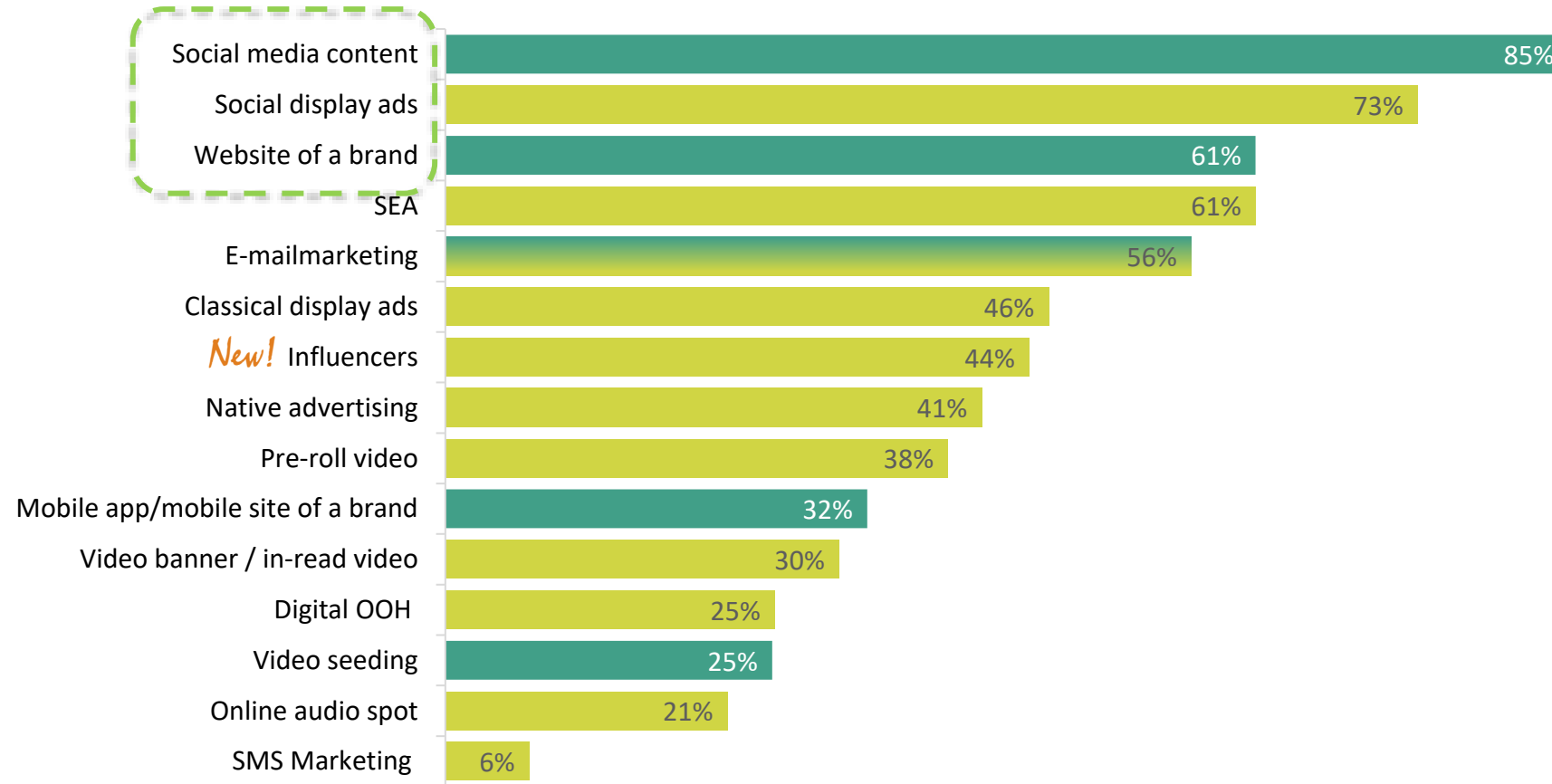


**44% of the respondents use influencers** in their digital mix

*What are the digital channels (means of online communication) that you actually used in 2018 to communicate online?*

## Use of digital touchpoints

Advertisers + Agencies (n=474)

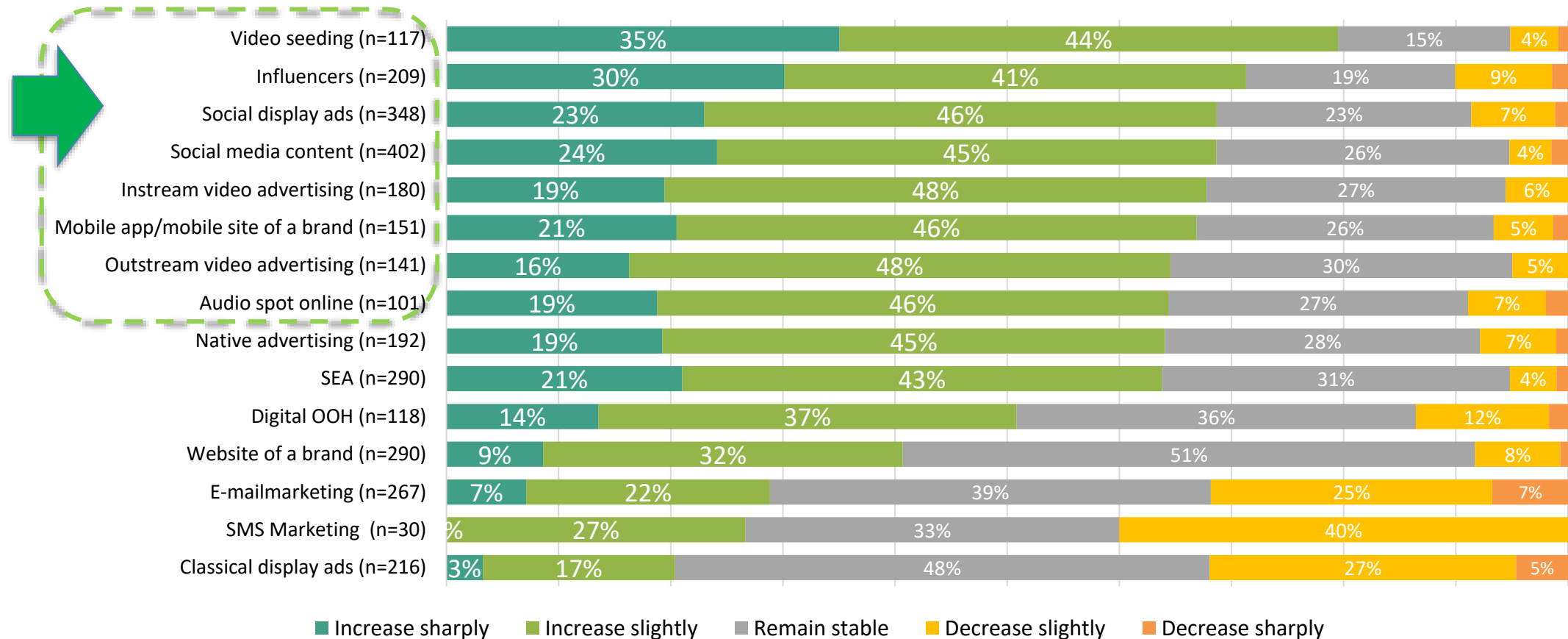


# Classical display has lowest expectation for future growth

To what extent do you think the use of these digital touchpoints will increase or will decrease in the near future (6 months)?

## Evolution of digital touchpoints (next 6 months)

Advertisers + agencies | use this touchpoint



# DIGITAL OPTIONS EXPANDING

**CROSS  
CHANNEL  
STRAT**

**DIGITAL  
MEDIA  
PLANNING**

**OLV  
STRAT &  
OPTIMISATION**

**CONTENT  
CREATION**

**MOBILE  
MKTG**

**SOCIAL  
UNIVERSITY**

**E TRAINING  
MODULES**

**SEA**

**DYNAMIC  
BANNERING**

**SOCIAL &  
FIELD  
ACTIVATION**

**EMAILING &  
NEWSLET.**

**LEGAL  
SUPPORT**

**BLOGGING &  
INFLUENCERS**

**CONVERS.  
MGMT**

**SOCIAL  
ADS**

**DATA  
INTELLIGENCE**

**SEO**

**GEO-  
LOCAL  
MKTG**

**24/7  
SOCIAL  
MEDIA  
SUPPORT**

**DATA  
TRACKING  
&  
ANALYTICS**

**CONTENT**

**SOCIAL  
SITES**

**E-  
REPUTATION**

**TAGS  
MGMT**

**TO RANK,  
UPON PROPERTIES AND TARGETS**

# TOUCHPOINTS CLASSIFICATION BOUGHT – OWNED – EARNED

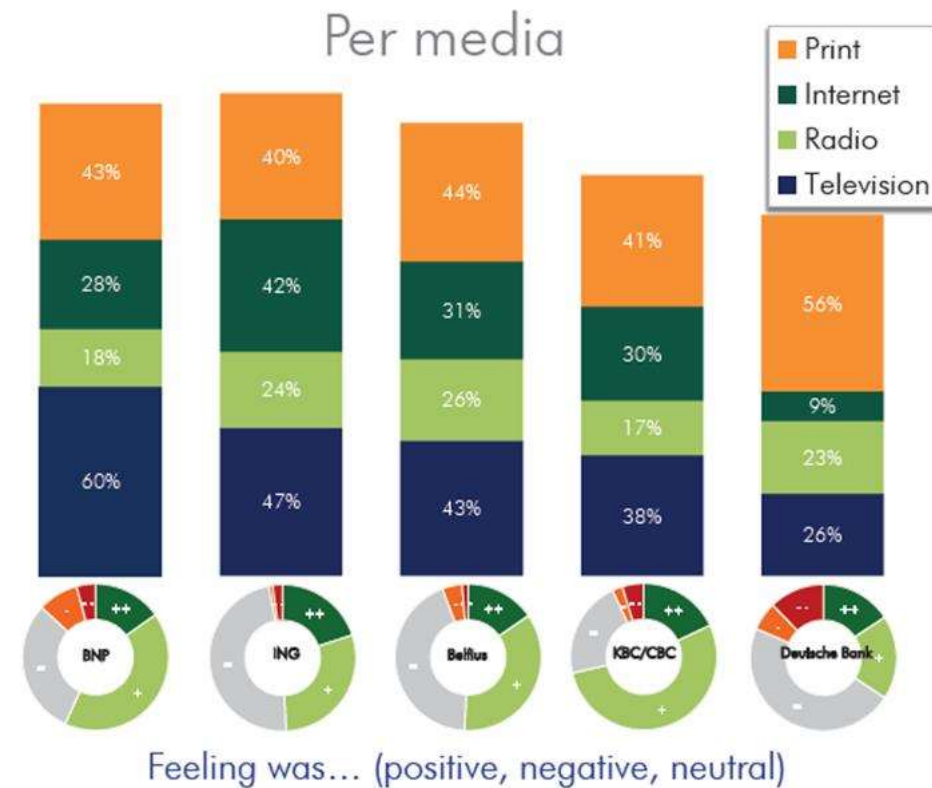
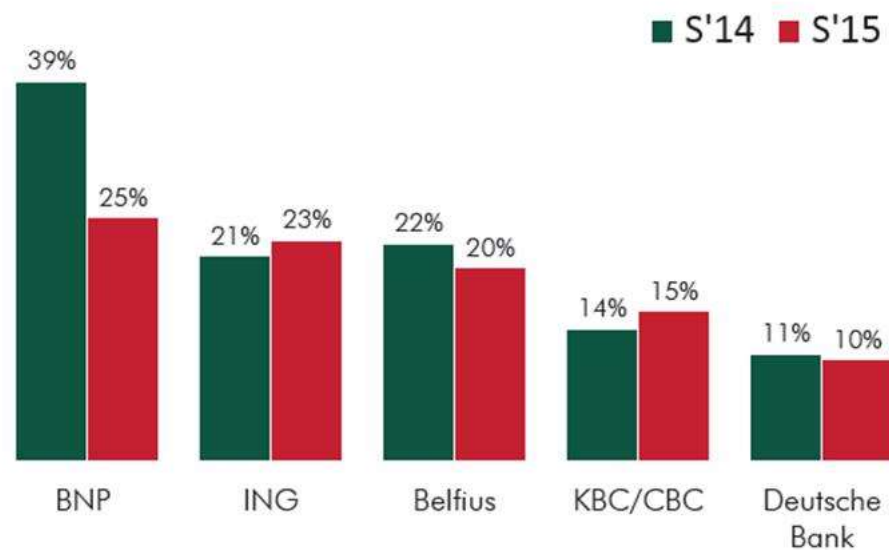


**THERE IS NO SPLIT BETWEEN  
ON, OFF AND FIELD IN THE USERS' MIND**



# Reputation of the brands – editorial impact (earned media)

## . EXPOSURE TO MEDIA INFO



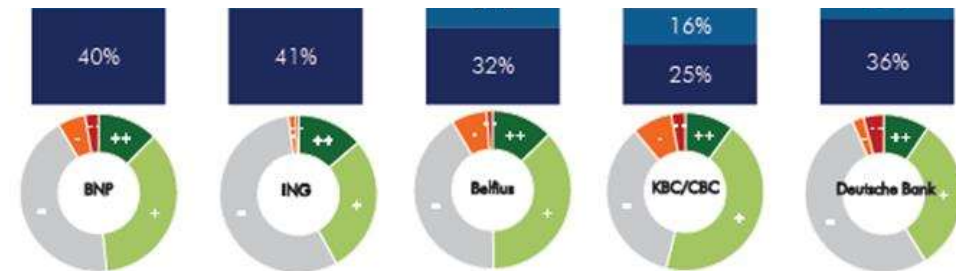
Source Brand Barometer Dentsu October 15

# Reputation of the brands – ad impact (paid media)

EXPOSURE TO ADVERTISING

Per media

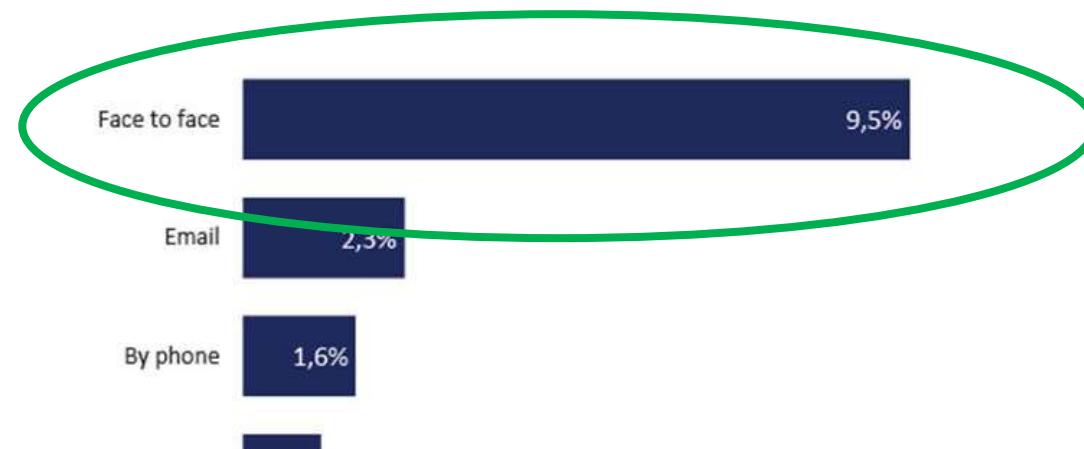
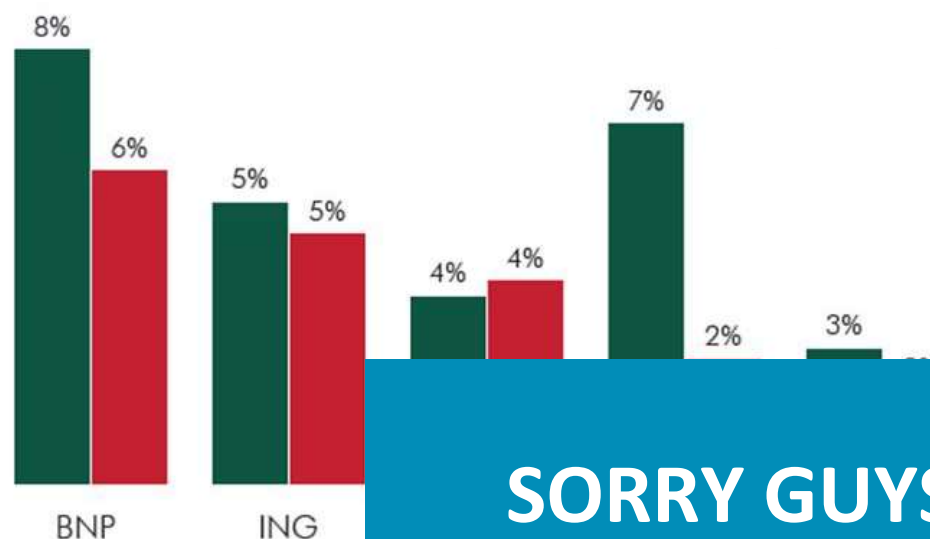
**AND : THERE IS NO SPLIT BETWEEN  
ADS AND CONTENT**



Feeling was... (positive, negative, neutral)

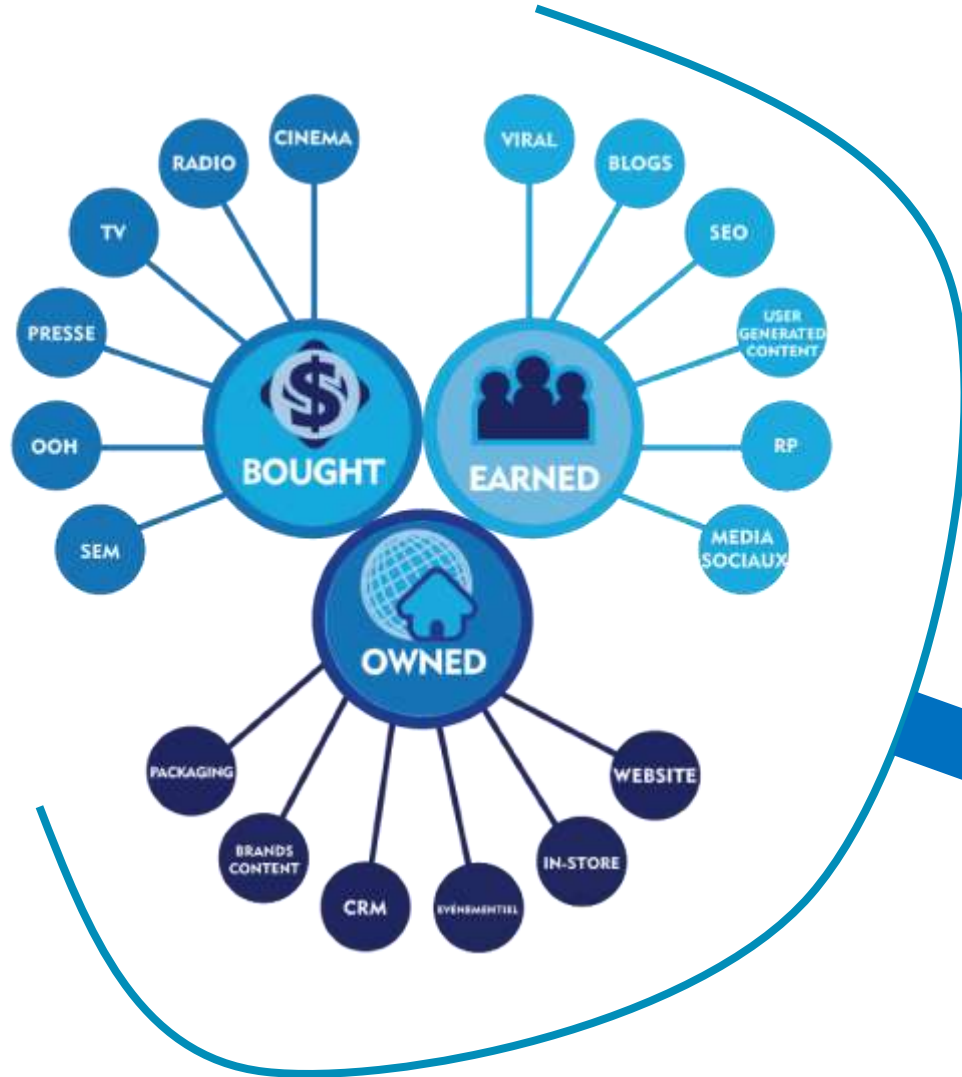
# Reputation of the brands – conversations impact

## EXPOSURE TO CONVERSATIONS



**SORRY GUYS, PEOPLE DO NOT MUCH  
SPEAK ABOUT BANKS ON SN**

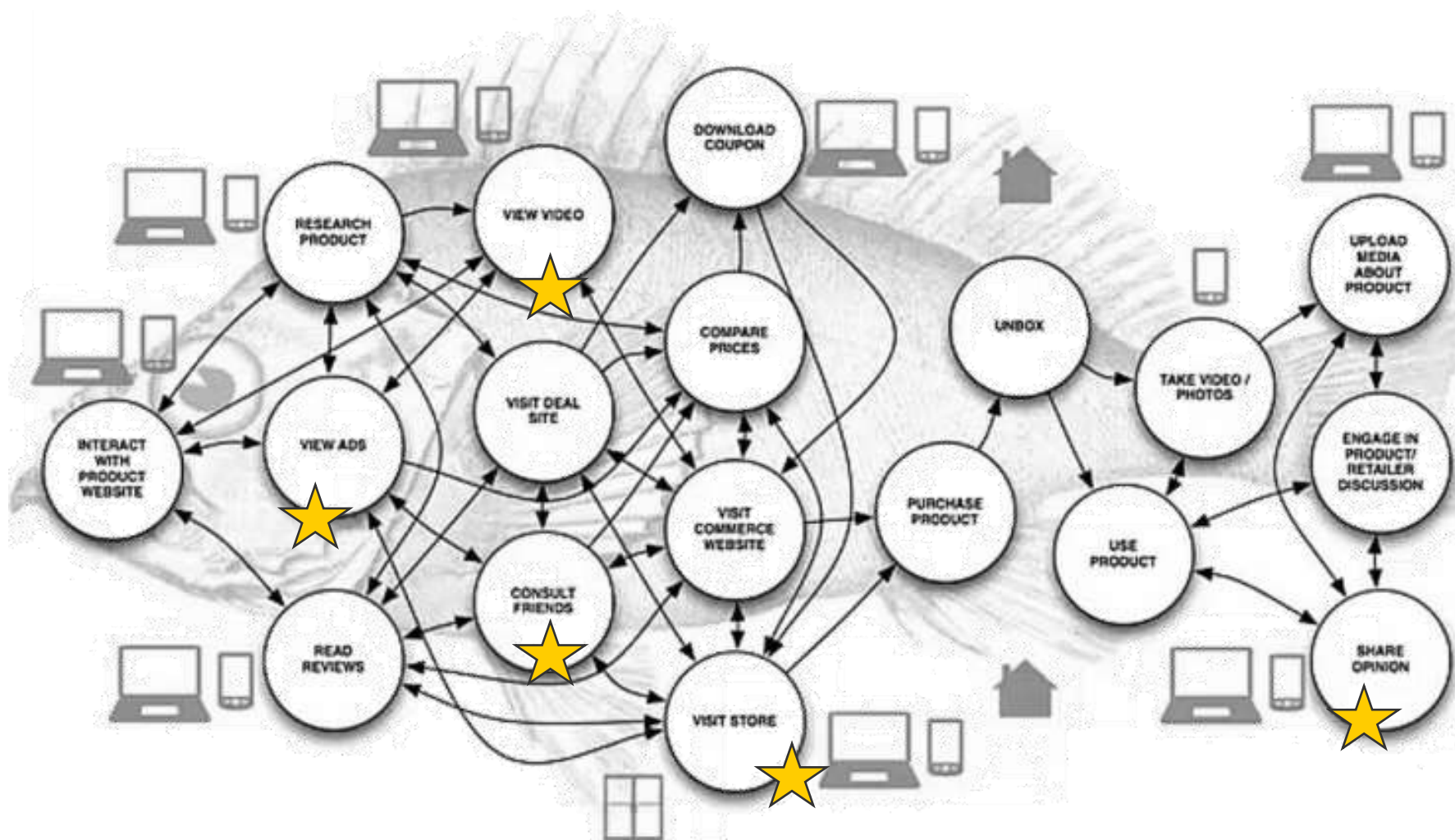
# A NEW MODEL DRIVEN BY MULTIPLE SOURCE DATA



**Ecosystems** designed to connect with people in the **BOE** world

Area of the **Story telling** & **content** versus push advertising

# NOW, IN A DISRUPTED CONSUMER JOURNEY, WHERE TO BEGIN?



# RELEVANCE FIRST = CONTENT

*"It is the empty cereal package, the broken DVD-player, or the fact that your car starts making funny noises, that triggers purchase..."*



**AD-HOC ANALYSIS OF THE JOURNEY,  
PERSONAS AND MOMENTS OF TRUTH**

*...not the fact that you have been exposed to certain advertising"*



# A FEW MODELS ?

To make it clearer and concrete

# IN A NUTSHELL : Digital Mix P.O.E.

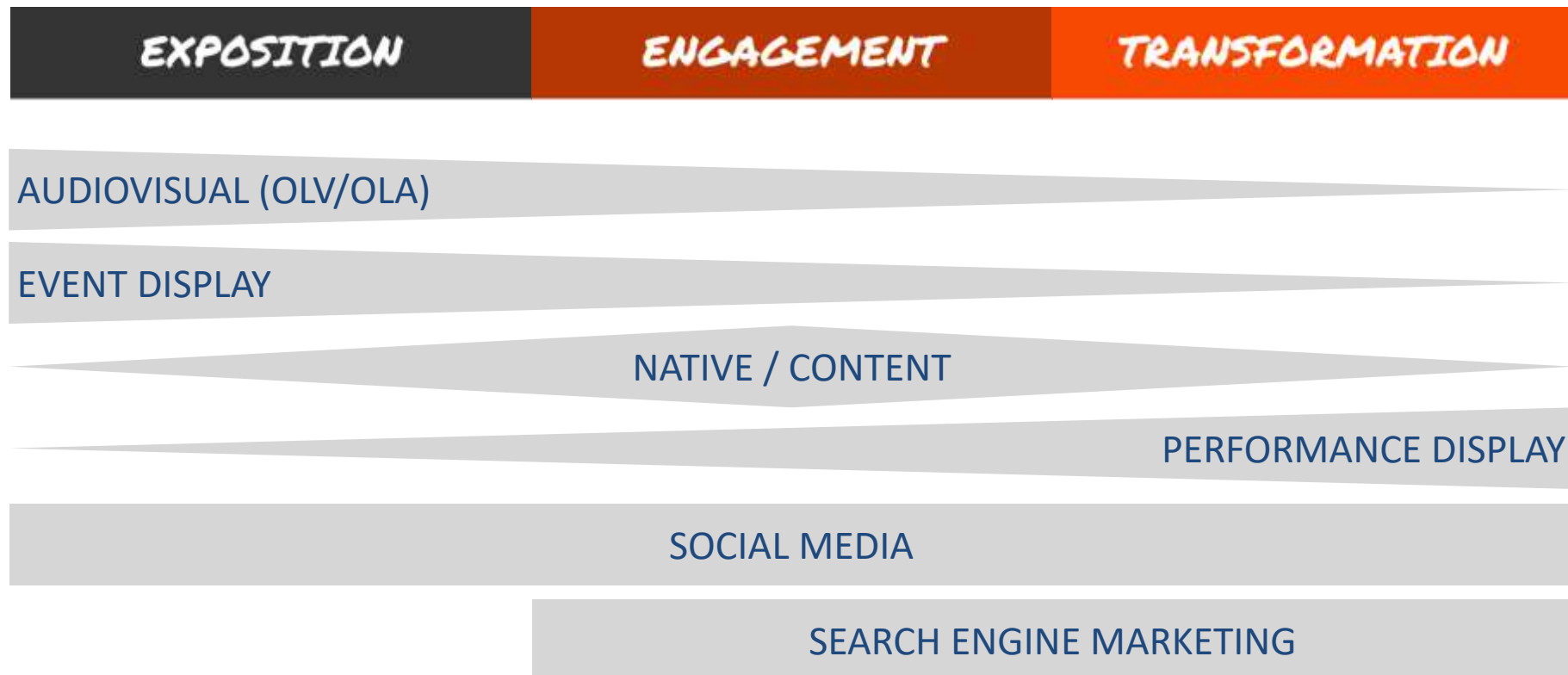




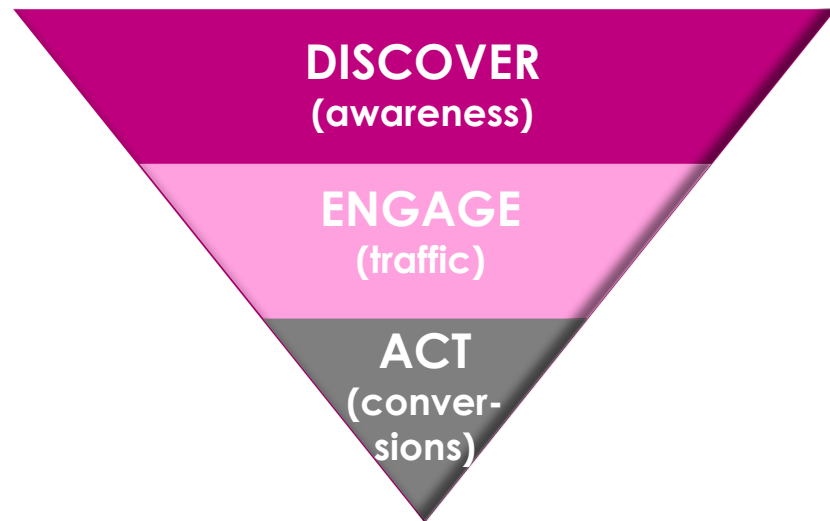
STRATEGY	PAID				OWNED			EARNED	
Media mix priority →	Display	SEA	Affiliate	Video Ads	SEO	Email / list broking	Video Channels	Social Media	Location based
Raise Awareness	✓	✓		✓	✓		✓	✓	
Traffic Generation	✓	✓			✓				
Customer Acquisition		✓	✓		✓				
Customer Loyalty / Cross Selling						✓		✓	✓
Brand Engagement							✓	✓	

# THE FUNNEL TO STRUCTURE THE ROLES OF ALL DIGITAL CHANNELS

Model 2  
Dentsu Aegis



# DIGITAL CHANNELS VS OBJECTIVES



DISPLAY (classic)	DISPLAY (progr)	VIDEO	SOCIAL	SEARCH
★★	★	★★★★	★★	
★	★★	★★	★★	★★★★
★	★★	★	★★	★★★★

Also based on  
the funnel

# RIGHT KPI's at every level, to correctly evaluate a campaign impact

**DISCOVER**

« I know the product/service »

Effective Reach

*GRPs*

*OTS/OTH*

Impressions

Views

**ENGAGE**

« It is relevant for me »

Selectivity

Visits

time spent

search volumes

like, share, comment

**ACT**

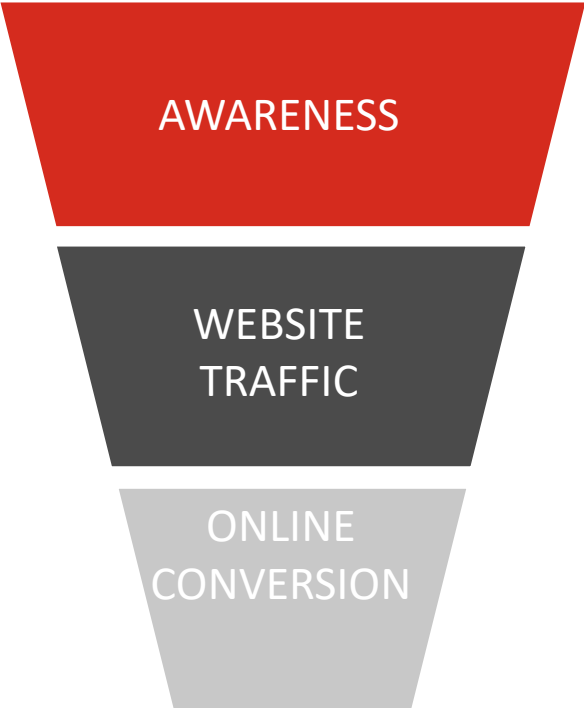
« I buy it, I do it »

Conversions

Sales

Also based on  
the funnel

# DIGITAL CHANNELS VS OBJECTIVES



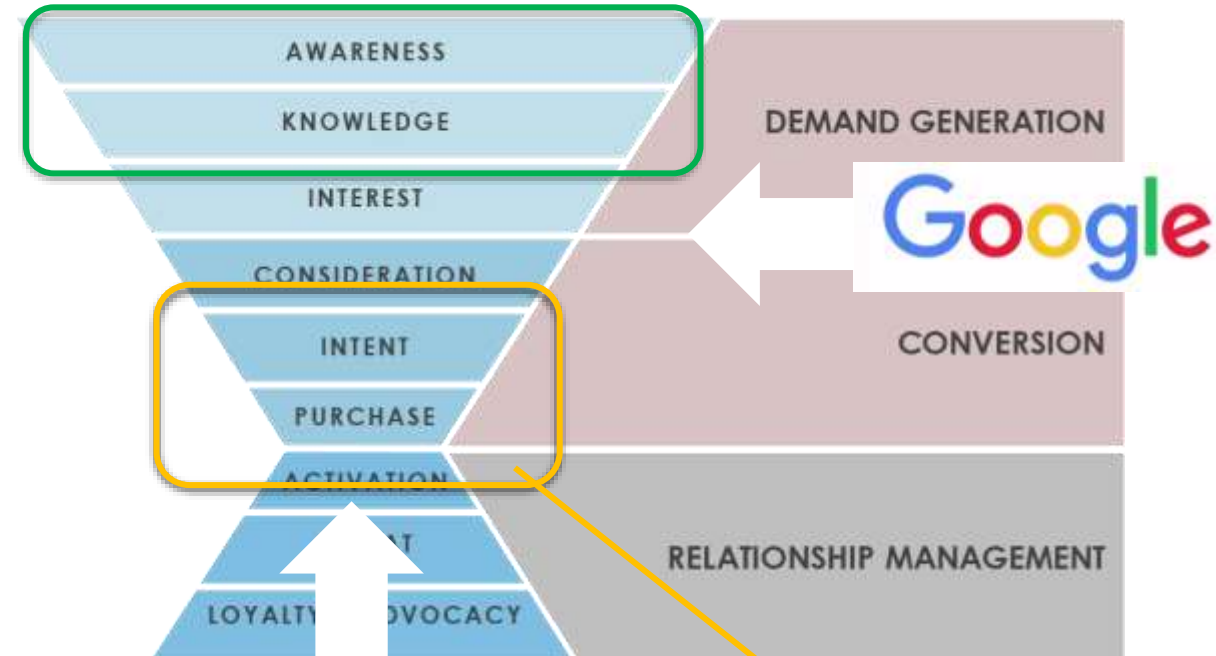
VIDEO	SOCIAL	DISPLAY (Classic)	DISPLAY (progr)	NATIVE	SEARCH
***	**	**	*	*	
*	**	*	**	**	***
*	**	*	**	*	***

# THE FULL VISION OF THE FUNNEL

Mid term effect of **all** touchpoints

- **Presence of mind** of brands
- **Knowledge** of offerings
  - ... Are firstly build **upstream**
- via **mass media, XPs'**
- and **sharing/ Social Media**, **not** searches

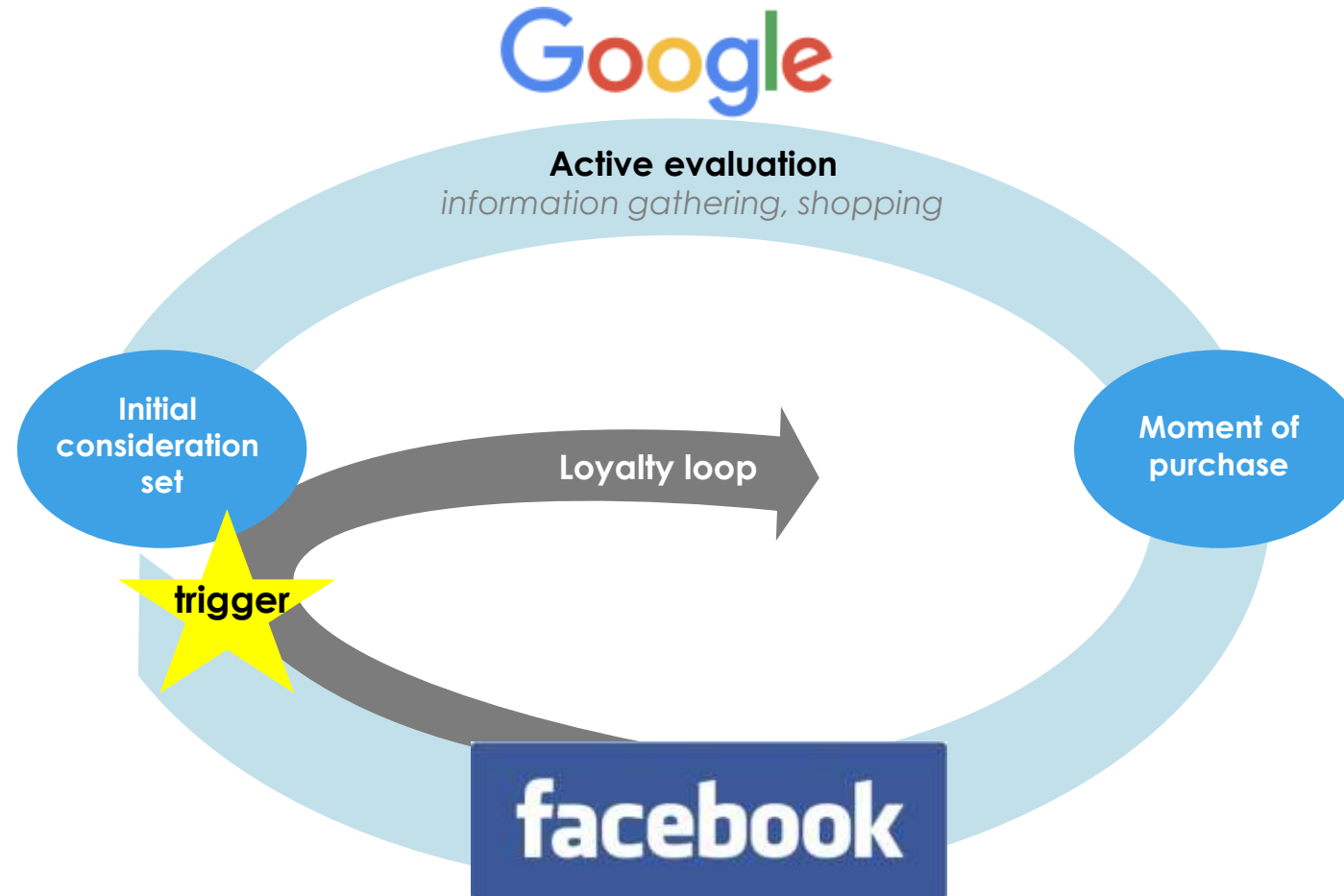
Mid-term influences for brand consideration



The critical moment

And : searches  
happen there  
Not BEFORE

# MAIN PARTNERS?



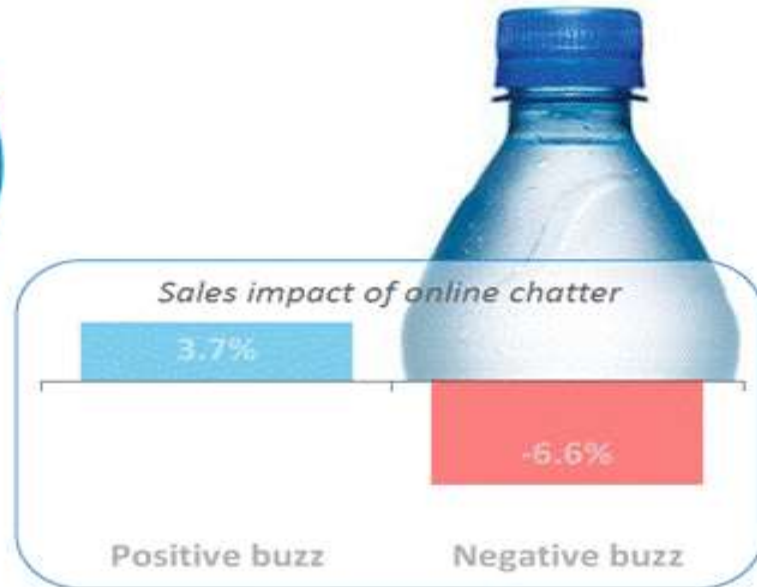
The initial “consideration set” (shortlist) happens **later** in the funnel

**ALL** the stages are of a key importance **at term**

# CONVERSATIONS EFFECTIVENESS ?

## It's not always good to be talked about

The sentiment of online conversations can be a sales driver – simply generating buzz isn't always enough



# CONVERSATIONS EFFECTIVENESS ?



## Word of mouth: positive and negative buzz

The ING brand has generated the biggest amount of positive buzz.  
4 out of 10 respondents have heard negative comments on Dexia.

Rabobank.be, ING, Deutsche Bank and Argenta have a positive net word-of-mouth score among retail investors.

**MINIMUM HALF OF COMMENTS ARE NEGATIVE  
ONCE YOU POST SO BE CAREFUL**



Base: total sample,  
data 2012, n = 1,308

Base: investors, data  
2012, n = 475



# AND : CONVERSION RATE NOT MATURE YET

L'abandon de panier représente 18 milliards de dollars de pertes de vente chaque année\*

- **Le taux d'abandon de panier sur mobile est plus élevé (97%) que celui sur laptop/ desktop (entre 70 et 75%).**
- Les principales raisons de l'abandon du panier sont les suivantes : le prix, le temps de chargement du site, les coûts d'expédition, la rapidité de livraison et les réductions disponibles.

\*Alioze.com 2019



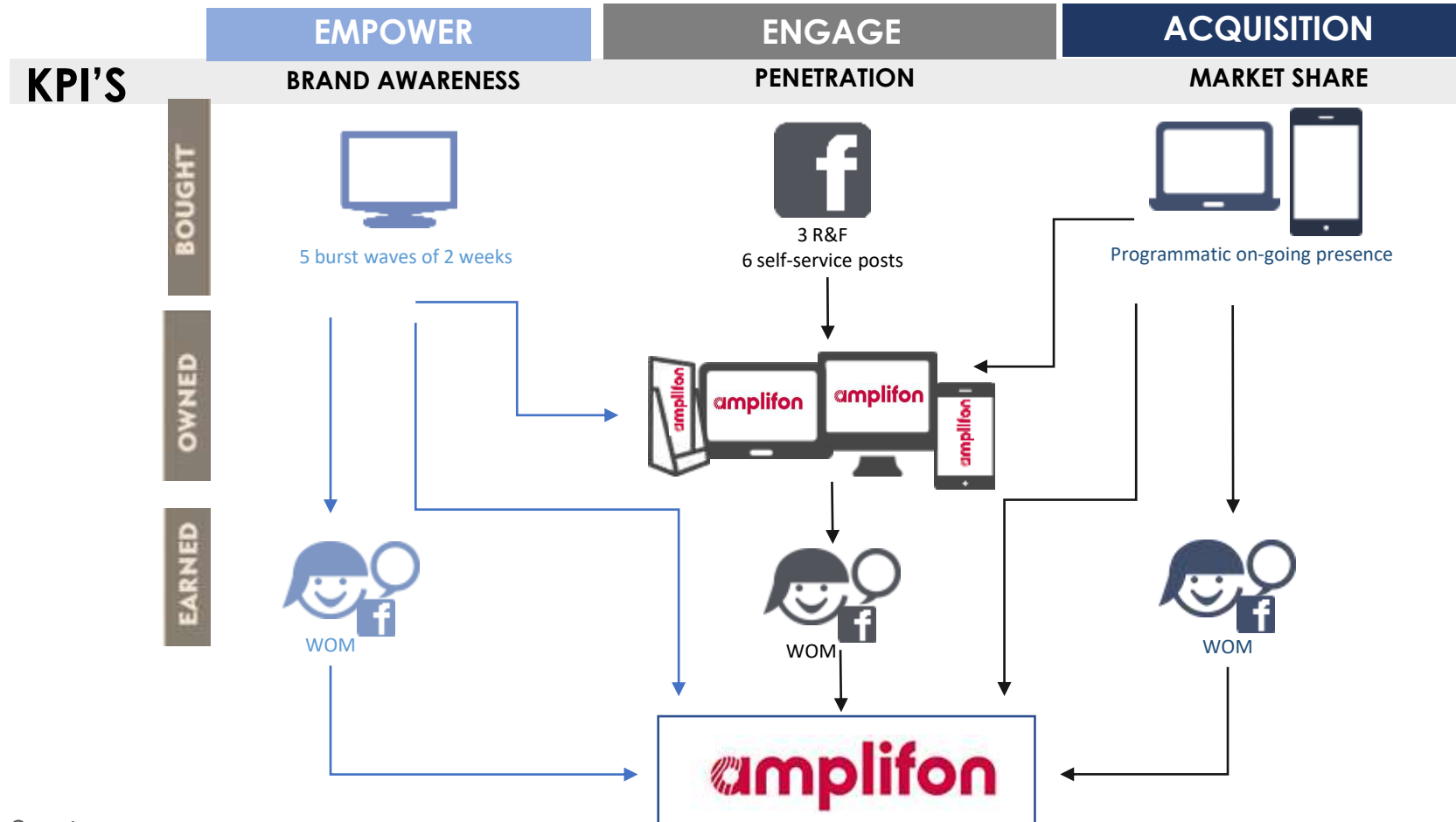


# THE FAMOUS ECOSYSTEMS



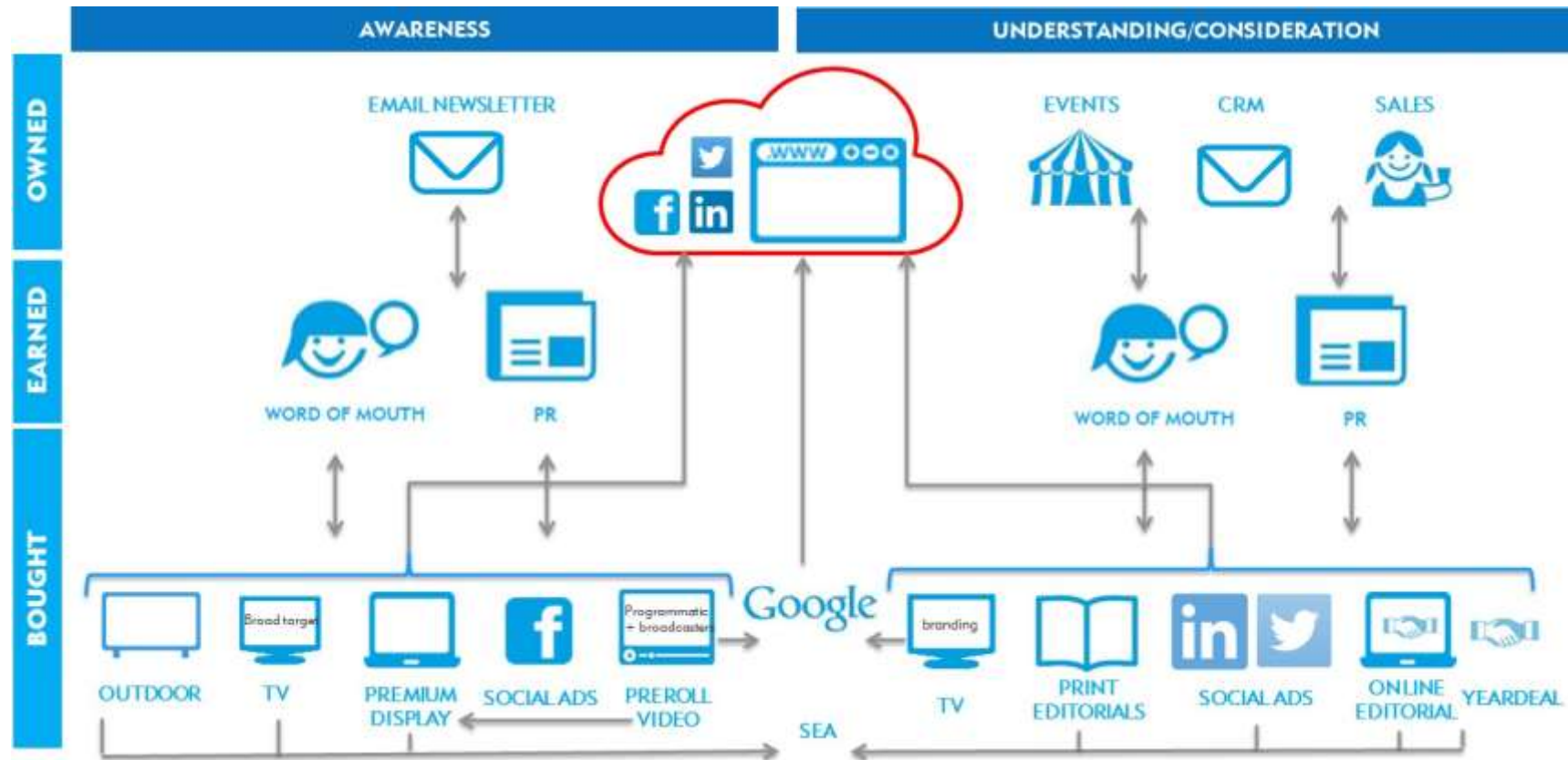
Do they really exist?

# ECOSYSTEM EXAMPLE 1



Source Carat

# ECOSYSTEM EXAMPLE 2



Source Carat

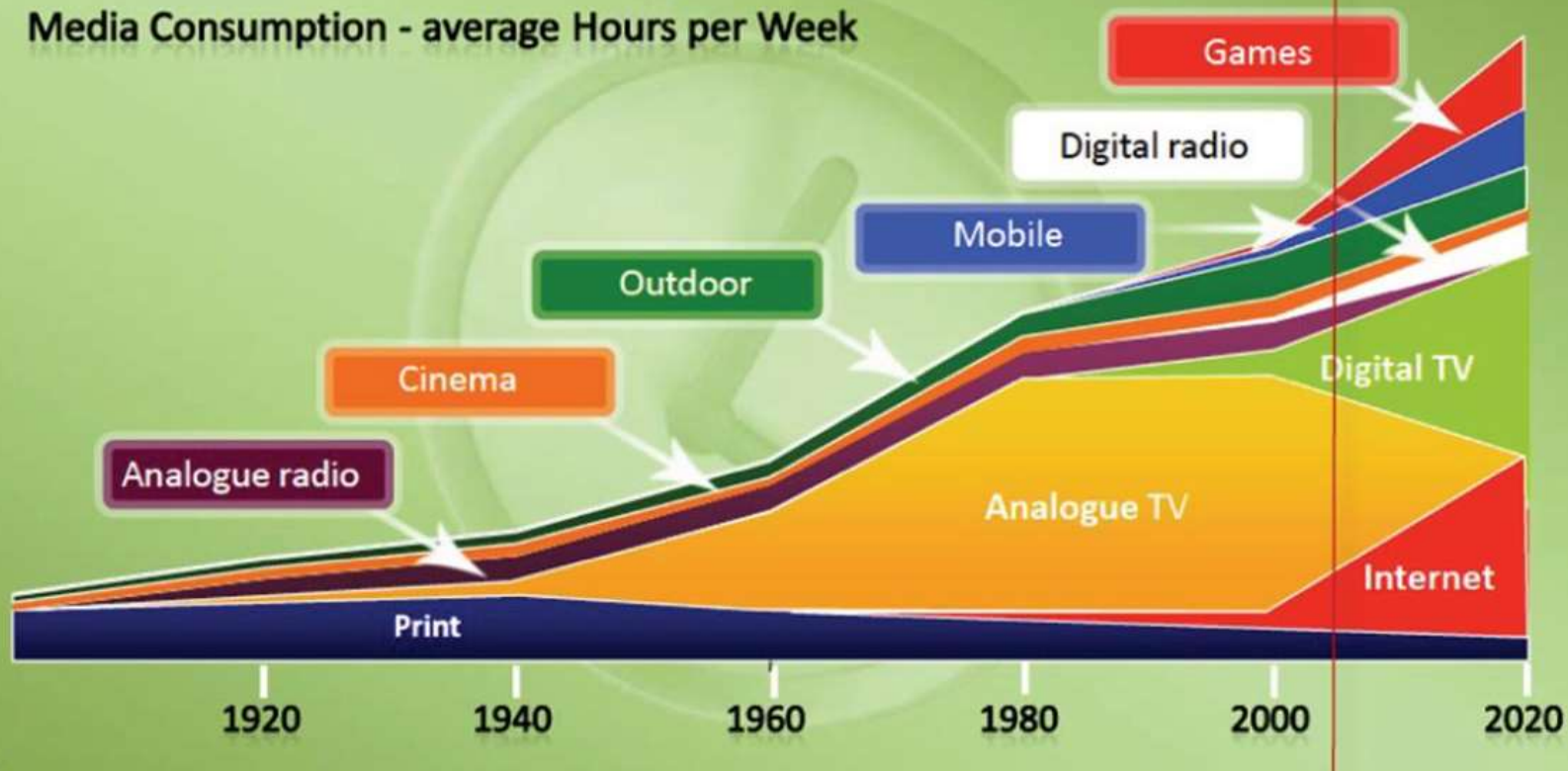


# MEDIA TRENDS

Attached 😊 (or let's fix a Zoom)

# DIGITIZATION ADDED MEDIA OPTIONS

Media Consumption - average Hours per Week



Growth rate: years to reach a quarter of the US population

Source Microsoft



# DIGITAL TRANSFORMATION IS CLOSING NOW

- NEW TECHNIQUES
- NEW MARKETING TOOLS
- NEW PURCHASE HABITS

90'ies

a decade

5 years



The biggest deal is happening now.



## ... WITH A DIGITAL VERSO



CAPITAL.FR

Comment un Espagnol a escroqué Amazon de 330.000 euros en renvoyant des boîtes de terre

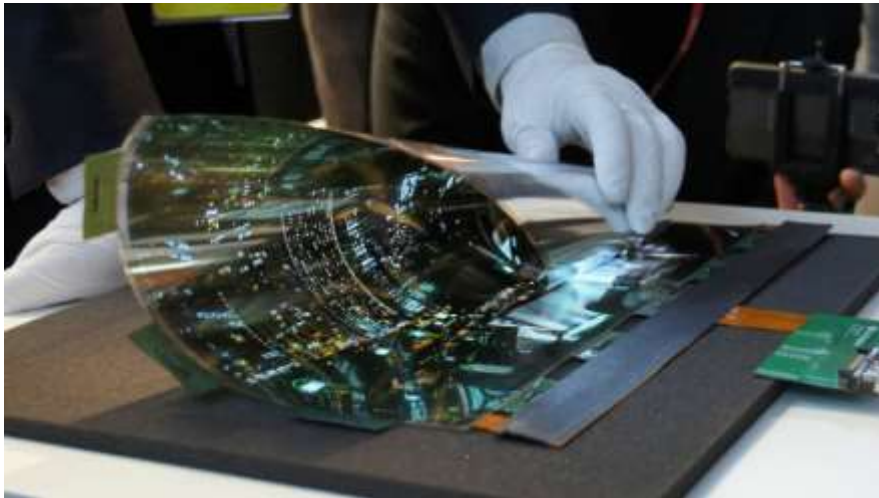


# NOW, THE POST-DIGITAL AGE



Merge ON and OFF ?  
(or) Maintain all preferences

→ What is *possible* & *necessary*





# MEASUREMENTS

The exciting section : let's talk business.



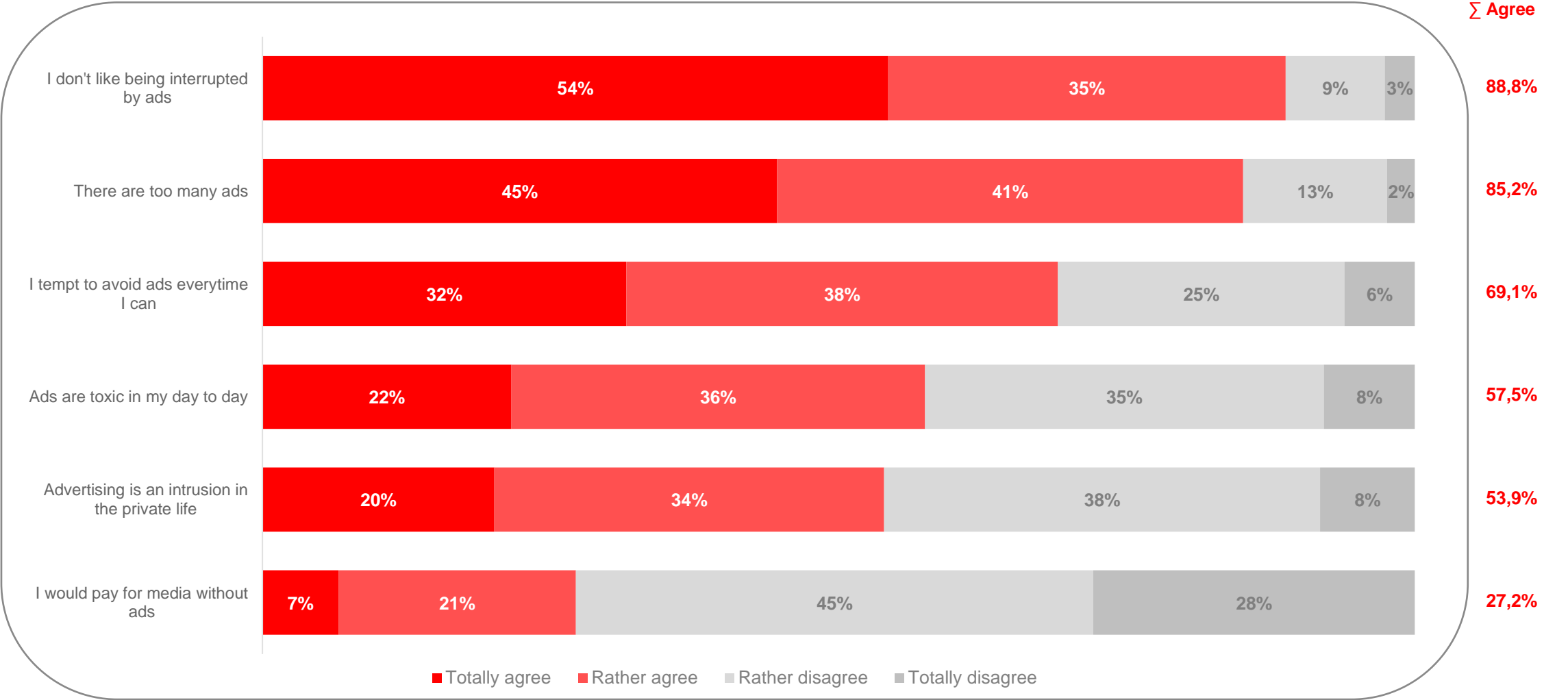
ONE KEY ISSUE:

**600 messages a day.**

WILL YOUR AD BE PART OF THE 10% RETAINED?

# Attitudes towards advertising

Negative

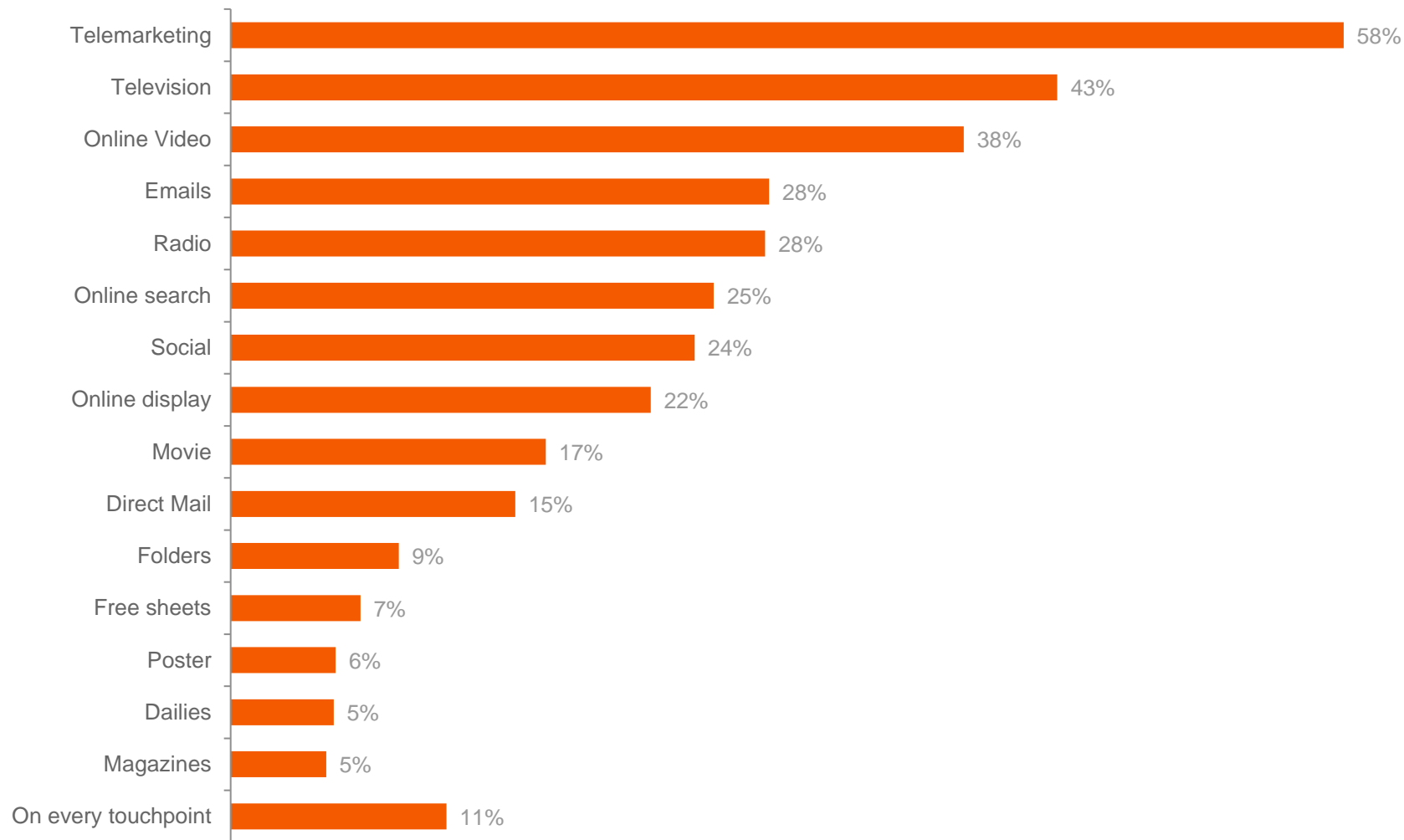


Total sample N = 2008

Source Welcome Media

confidential

# Touchpoints where ad is wished to disappear



Total Attitudes N = 1004

# EVERY MEDIA ITS BLOCKERS

The consumer takes control  
via ad avoidance techniques \*

% OF PEOPLE **ALWAYS** USING...

- ✓ SKIP PRE-ROLL 63%
- ✓ AD BLOCKER 32%
- ✓ ZIPPING TV 23%
- ✓ NO PUB STICKER 19%
- ✓ ZAPPING RADIO 6%
- ✓ THROW AWAY ALL DIRECT MAIL 4%

\* WE TRACKED MORE THAN 65 TECHNIQUES

**SOLUTION ?  
ASK THE USERS,  
AGAIN.**



# WHAT DOES ENGAGE AUDIENCES?



Just study that point.

# Our approach to Tracking, Measurement and Evaluation



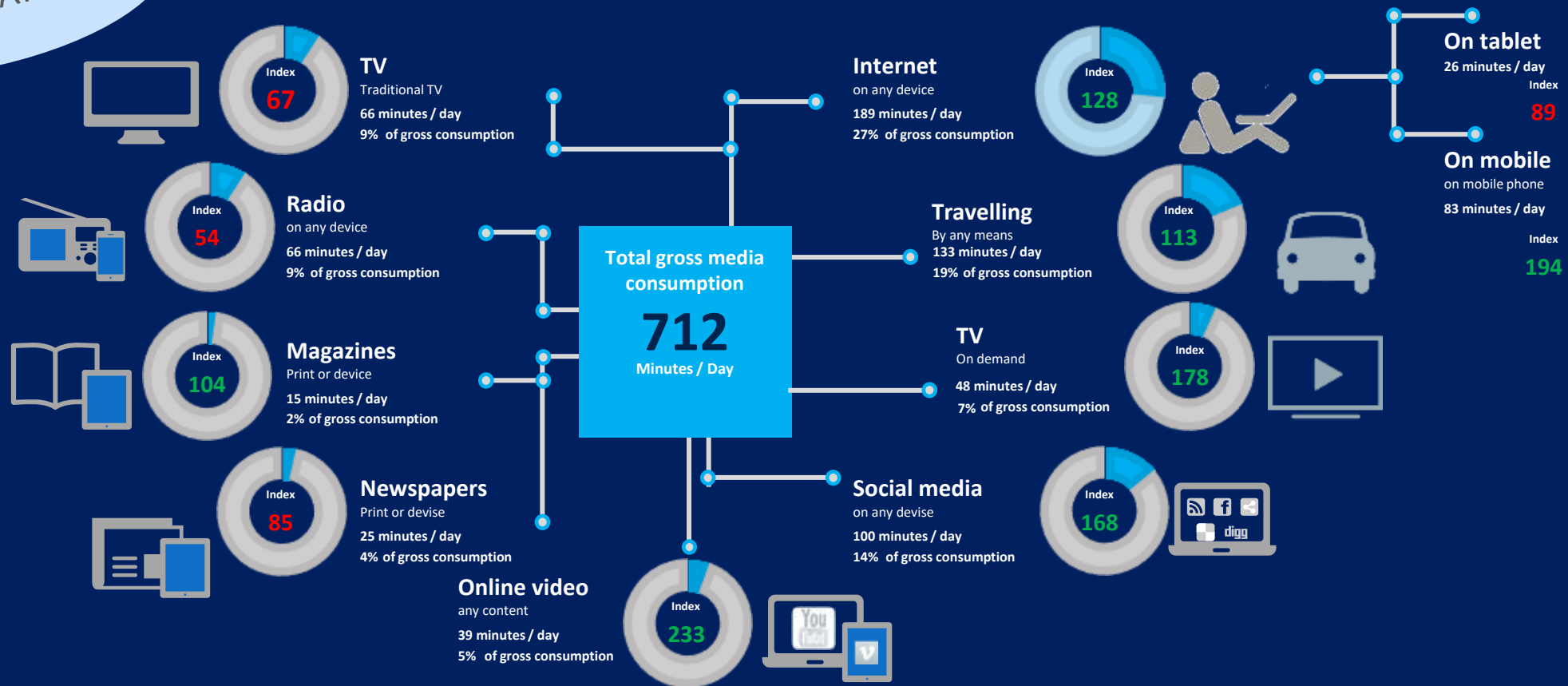
# Our approach to Tracking, Measurement and Evaluation



# MULTI-TASKING MEDIA CARNIVORES WITH A CLEAR DOMINANCE OF DIGITAL



ILLUSTRATION



**MEDIA : WE KNOW EVERYTHING ABOUT EVERYONE/ NOT THE ISSUE**



## Boissons alcoolisées (bières, alcools, apéritifs)

Dans quelle mesure les éléments ci-dessous influencent-ils, selon vous, le consommateur dans sa décision d'achat de boissons alcoolisées ?



Beïnvloedt sterk



Beïnvloedt een beetje



Beïnvloedt niet

 Pub audiovisuelles <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Pub presse <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Affichage extérieur (dans les rues, gares, transports publics) <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Emballage spécial, bouteille & boîte spéciale, pré-mix, pack apéritif,.... <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Echantillons distribués gratuitement/dégustation (avec hôtesses) <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Mise en avant de la marque : display-présentoir/Sous-verre/Menu/Affichettes... <input type="radio"/> <input type="radio"/> <input type="radio"/>
 Mentions de la marque : enseigne extérieure/caisson lumineux / logos... <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Réduction de prix/coupon de réduction/bon d'achat <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Sponsoring d'autres événements (culturels, expo, sportif,...) <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Sponsoring de soirées ou de concerts (rock/pop/jeunes) <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Conversation avec amis, collègues, connaissances <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Magazines d'information, newsletters, folders <input type="radio"/> <input type="radio"/> <input type="radio"/>
 Le site internet de la marque <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Stand aux foires, salons et événements divers <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Concours avec prix à gagner, lié à l'achat du produit <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Articles dans la presse ou émission à la télévision, à la radio... <input type="radio"/> <input type="radio"/> <input type="radio"/>	 Folders Magasin, brochures prises sur le point de vente <input type="radio"/> <input type="radio"/> <input type="radio"/>	

Y-a-t-il, selon vous, d'autres éléments qui influencent beaucoup le consommateur dans sa décision d'achat de boissons alcoolisées ?

☐ Oui

☐ Non

Volgende ➡



## Boissons alcoolisées (bières, alcools, apéritifs)

Vous personnellement, à quelle fréquence vous sentez-vous exposé à ces différents éléments pour l'achat de boissons alcoolisées ?



Dikwijls



Af en toe



Nooit



Pub audiovisuelles



Pub presse



Affichage extérieur (dans les rues, gares, transports publics)



Emballage spécial, bouteille à boide spéciale, pré-mix, pack apéritif...

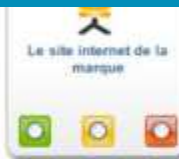


Echantillons distribués gratuitement/dégustation (avec hôtesses)



Mise en avant de la marque : display, présentoir/Sous-verre/Menu/Affichettes...

THE TWO PARAMETERS ARE ALWAYS ABOUT ATTENTION AND INFLUENCE



Le site internet de la marque



Stand aux foires, salons et événements divers



Concours avec prix à gagner, lié à l'achat du produit



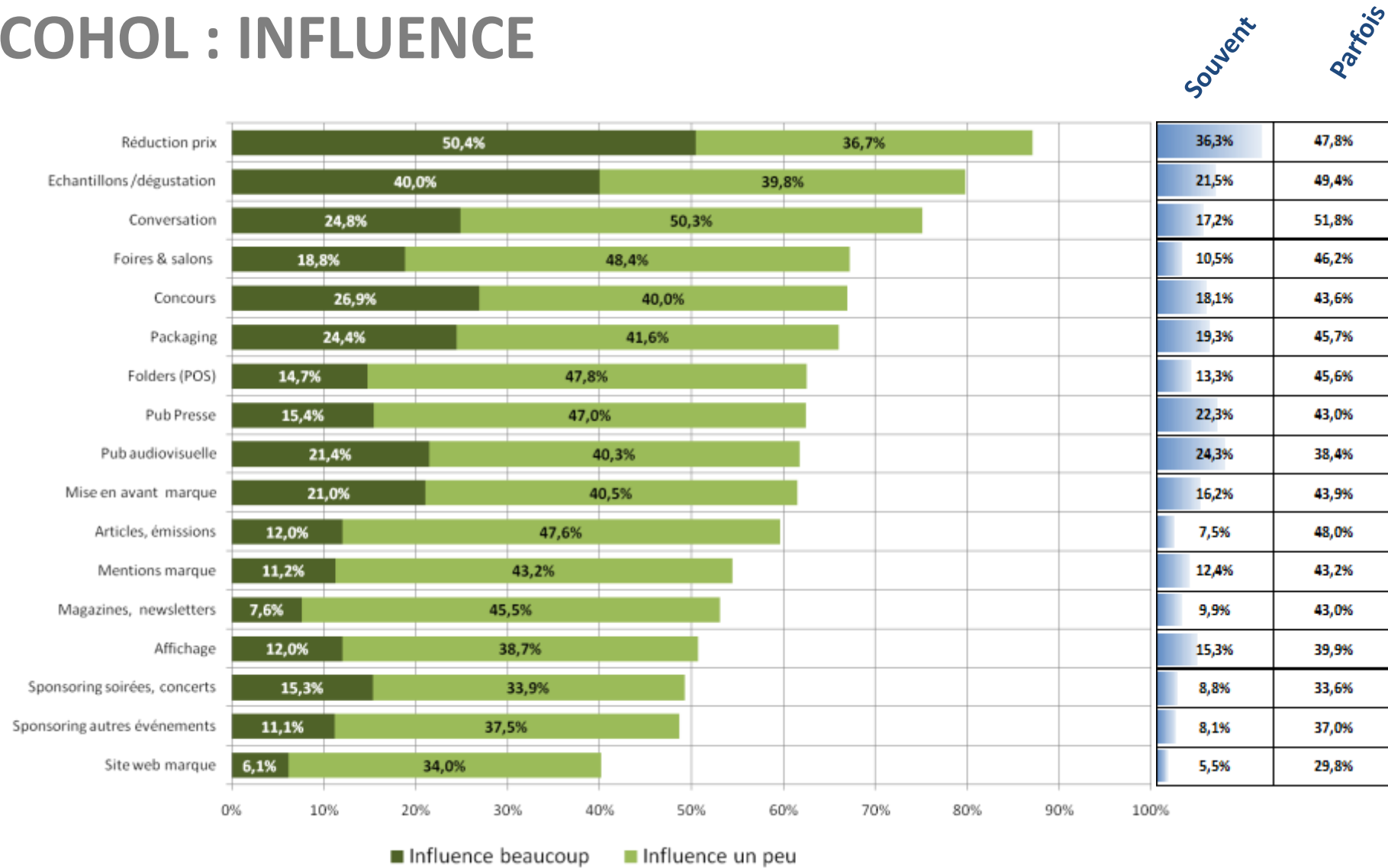
Articles dans la presse ou émission à la télévision, à la radio...



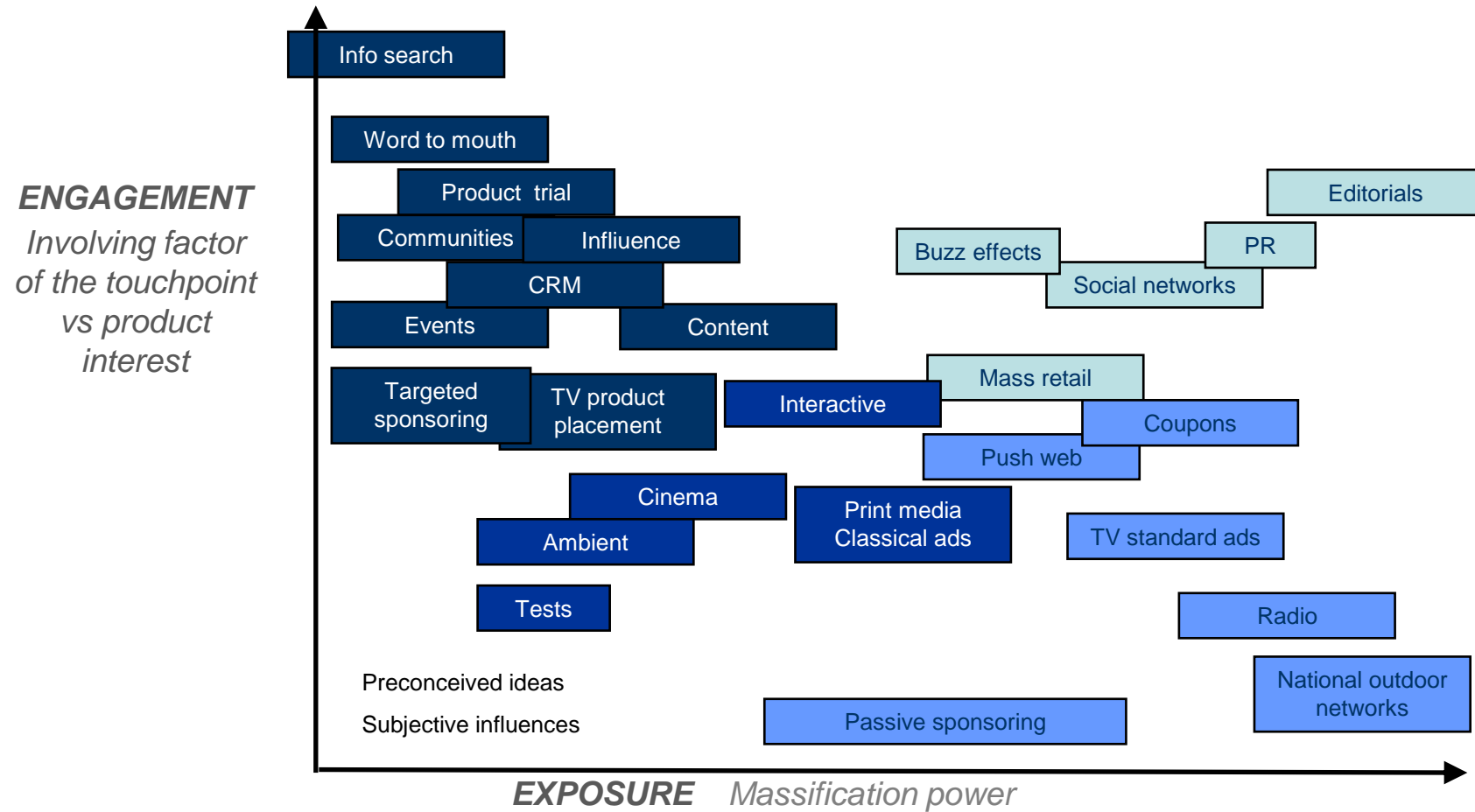
Folders Magasin, brochures prises sur le point de vente

Volgende

# ALCOHOL : INFLUENCE



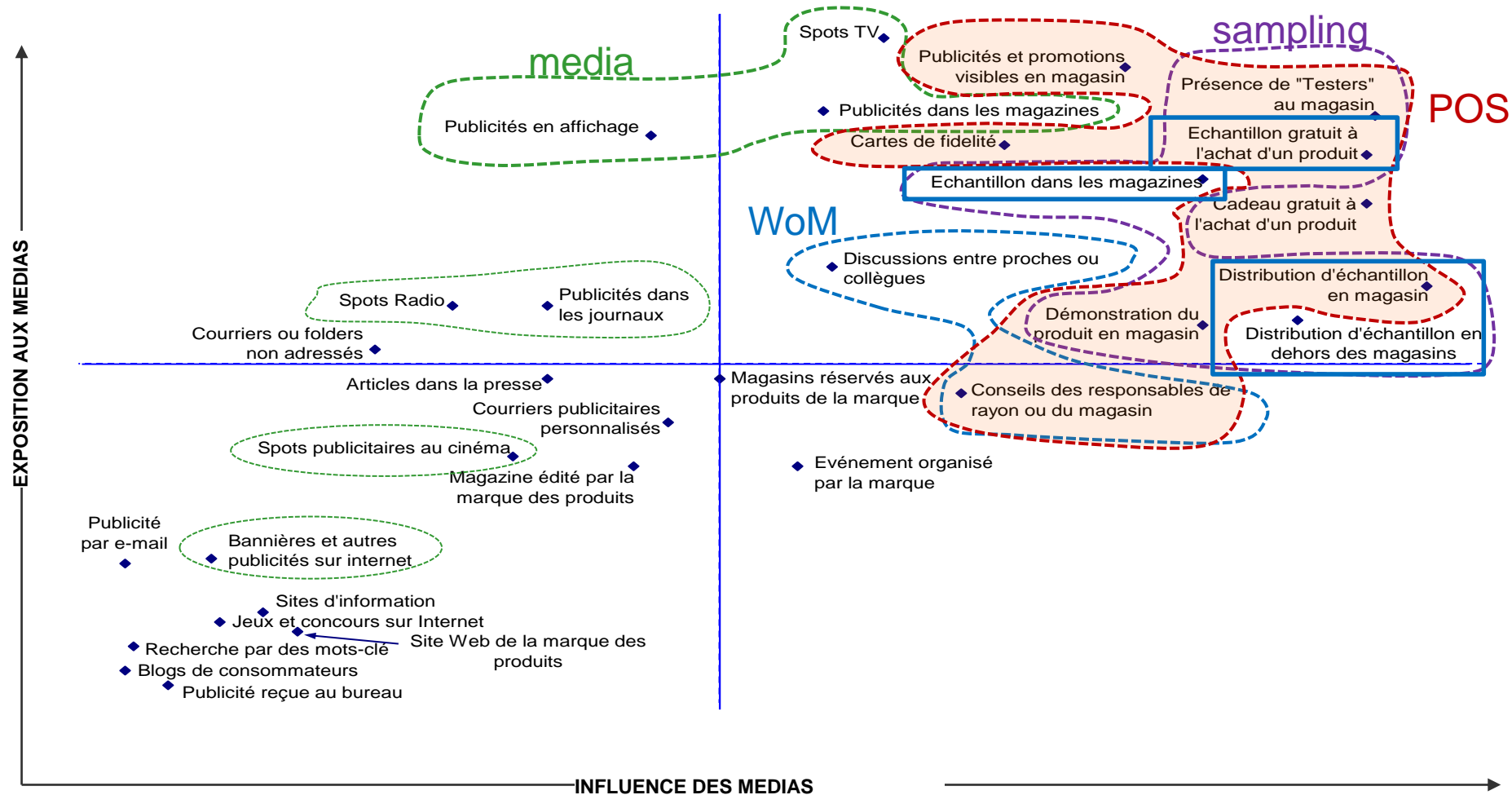
# TOUCHPOINTS ENGAGEMENT AND REACH (SAME)



# TOUCHPOINT MAPPING

Matrice : Influence VS Exposure

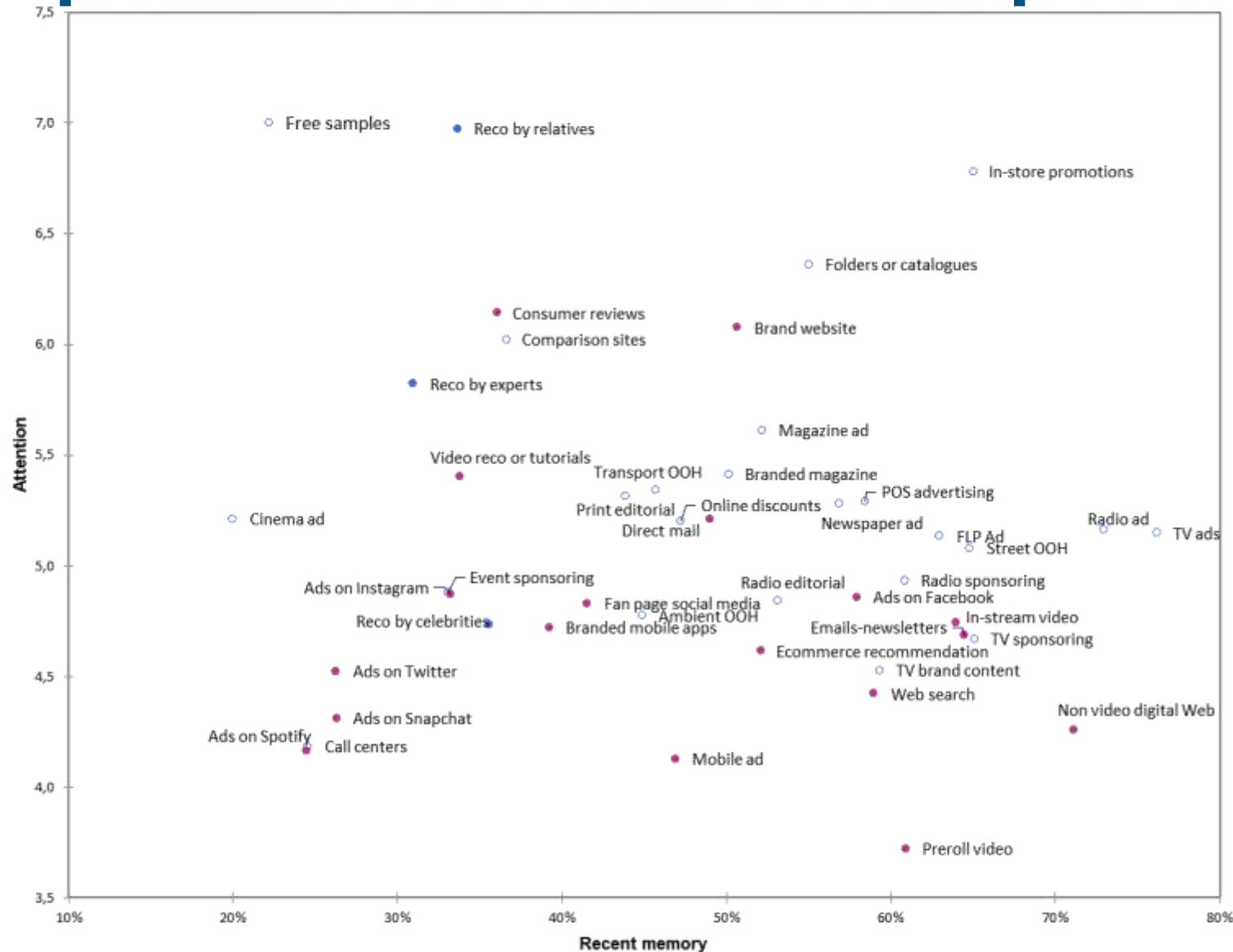
SAME



[%; réponses assistées; base : Total Femmes : N=491]

# Impact vs attention to touchpoints

SAME...



All respondents.

# FOCUS ON CATEGORIES

**Sport** : 30 touchpoints, illustrated

Sponsor's animation 	Exclusive experience offered by sponsor 	Contest to win tickets 	Gift pack 	Website 	Pre-sales @ sponsor place 
LED Screens on location 	Flags & banners on location 	Tailor made smartphone app 	In-programme (paper or digital) 	Participant number 	Presence within media plan 
Active integration sponsor in evt 	Naming title sponsor 	Team cars 	Podium 	Presence on digital platforms 	Start/end line 
Naming location 	Clock/chrono/ marker board 	Animation of key moments 	Dedicated medium club or evt 	Aftermovie 	Crew outfit 
Ball/paddle, game support 	Email/newsletter 	Social networks 	Signalling 	Medal or cup 	Interview board 

## Discover

« This touchpoint allows to **know better** the brand or product »

## Engage

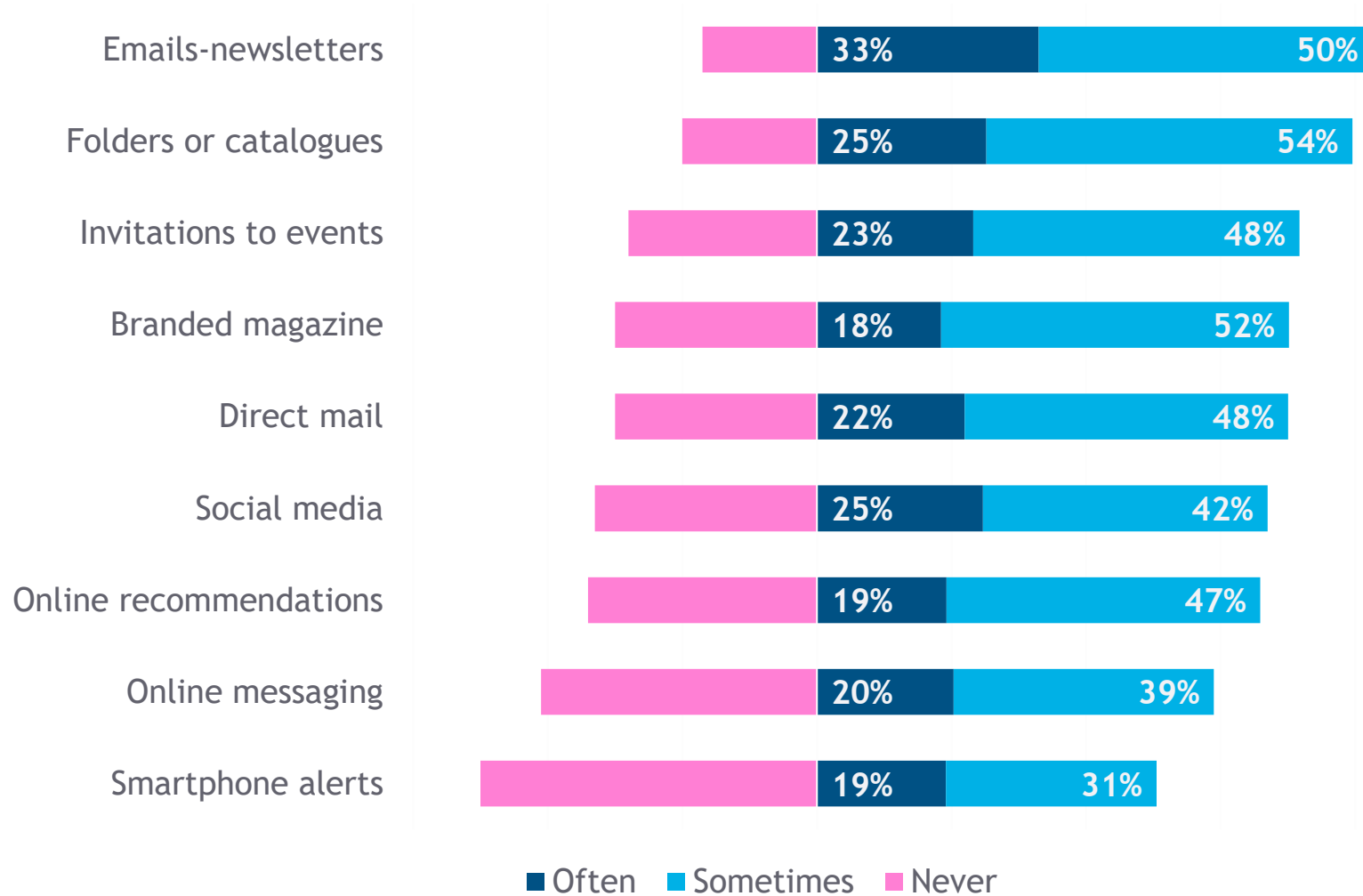
« This touchpoint brings me **closer** to the brand or product »

## Act

« This touchpoint **prompts** me to speak about, look for information or even use/buy the brand or product »

# « GROW CHANNELS »

Preferred D2C channels



Positive	Index vs all
83%	103
80%	105
72%	117
70%	107
70%	105
67%	122
66%	122
59%	128
50%	133

# COMMUNICATION SELECTION GRID

	TV	Mags	Paper	Radio	Cinema	Outdoor	Mobile	Internet	Ambient	PR	Promotions	DM	P'ships
Image	3	3	1	1	3	2	2	2	3	3	2	1	3
Information	1	2	3	1	1	1	2	3	1	2	2	3	
IF YOU DON'T HAVE BUDGET FOR SURVEYS AND TOOLS, BE SMART													
Affinity	2	2	1	2	2	1	3	3	3	3	1	1	
Efficiency	3	2	2	2	1	1	1	3	1	2	1	1	
TOTAL	8	6	5	6	5	5	7	8	4	6	4	4	
TOTAL	14	14	13	10	11	10	14	19	12	15	11	11	14



3 = Good Performer      2 = Average      1 = Poor



# CONCLUSION

Nothing has changed.

# NOTHING HAS CHANGED

DELIVERING THE RIGHT  
CONTENT,  
TO THE RIGHT PERSON,  
IN THE RIGHT PLACE,  
AT THE RIGHT TIME

