

“B : A / M !

Presentation **BAM** MATRIX / 2020 !

In collaboration with



- Fieldwork :
 - CAWI (from 04/03/2020 to 31/3/2020)
 - CATI (from 14/04/2020 to 08/05/2020)
- Sample :
 - 724 interviews (75% CAWI – 25% CATI)
- Profile :
 - Advertisers, agencies and media/sales houses
- Field operators :
 - Dynata (CAWI) & Research Plus (CATI)
- Analysis :
 - BAM & Phimedia
- Partners :

METHODOLOGY /

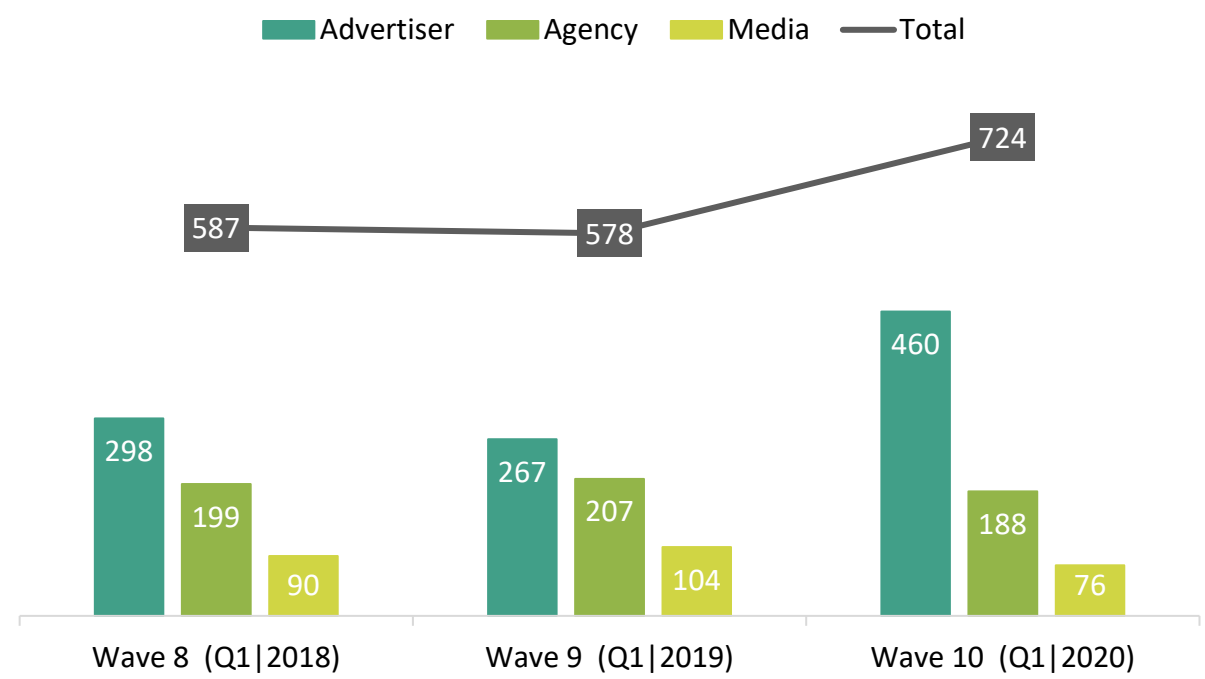


1. Sample description
2. Frequency according to communication task
3. Efficiency of digital touchpoints
4. Online media ad spend
5. Measured KPI's
6. Programmatic buying
7. Key take-aways

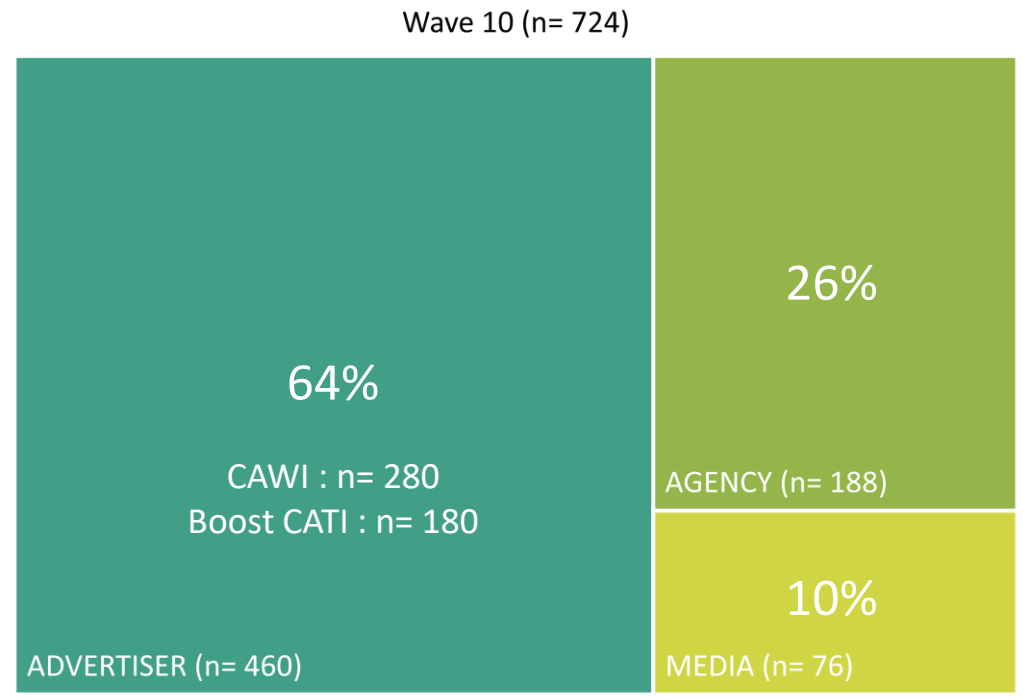
CONTENT /

1 / Sample description

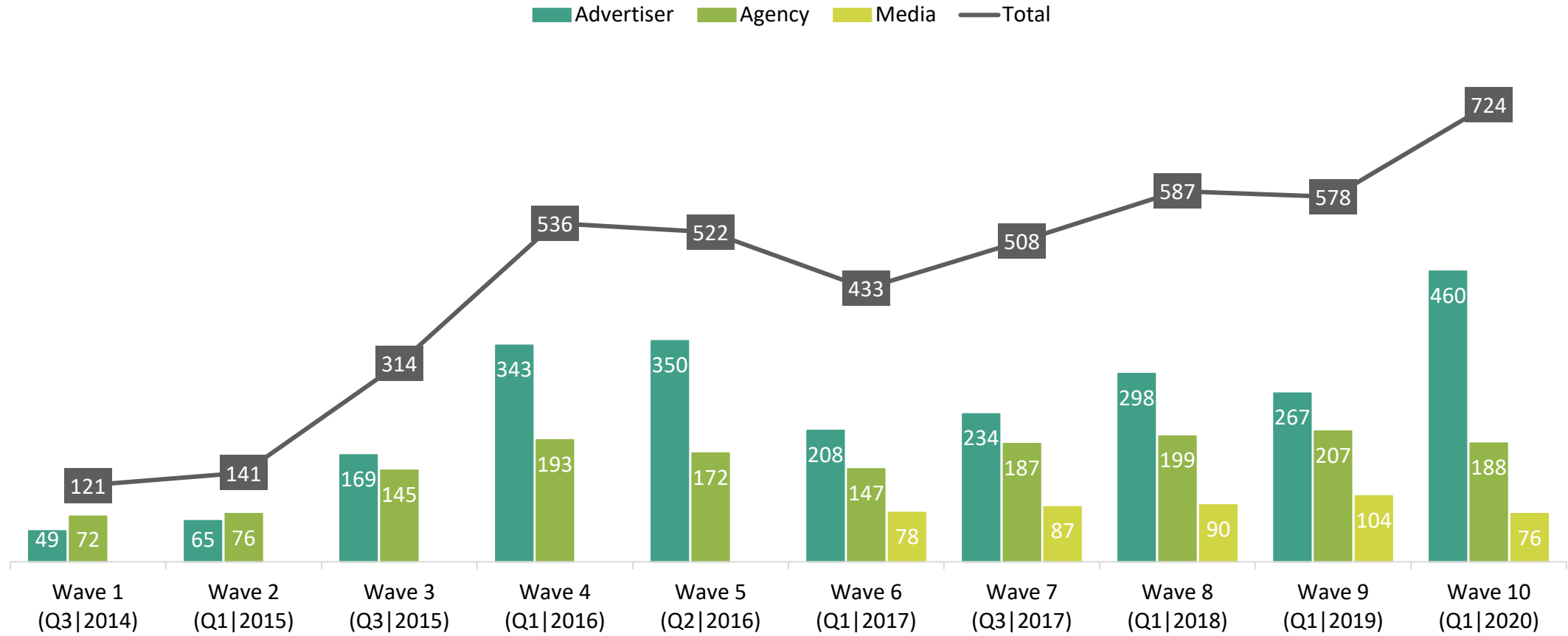
Sample size



Sample structure

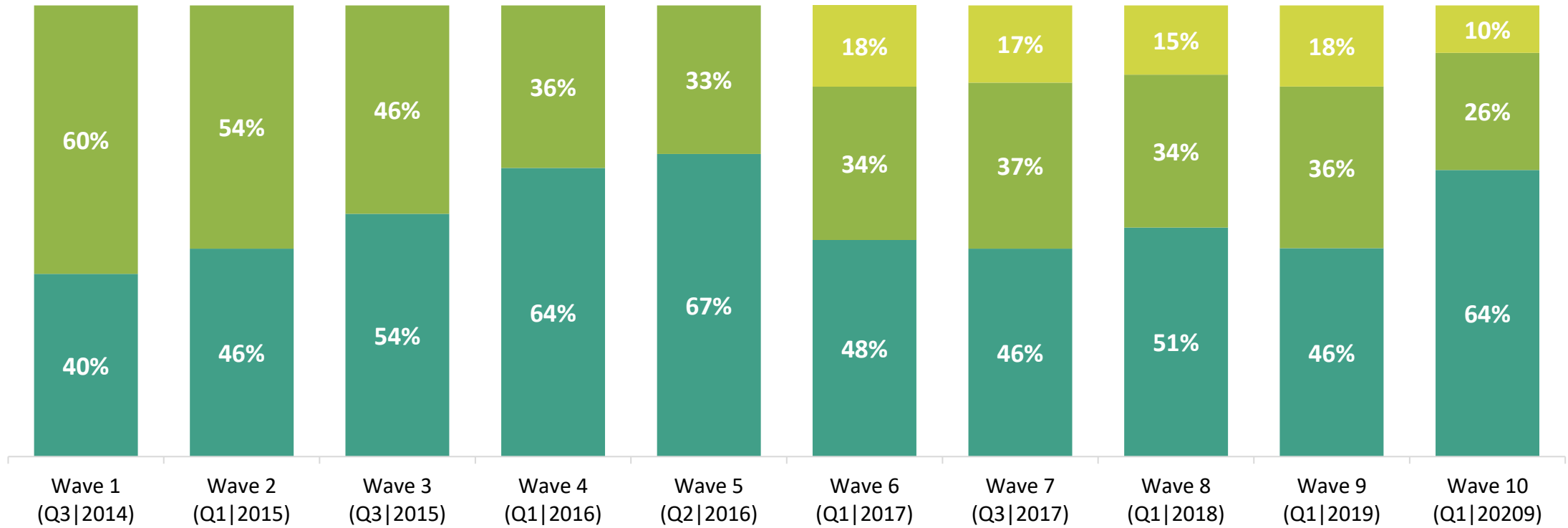


Sample profile



Sample profile

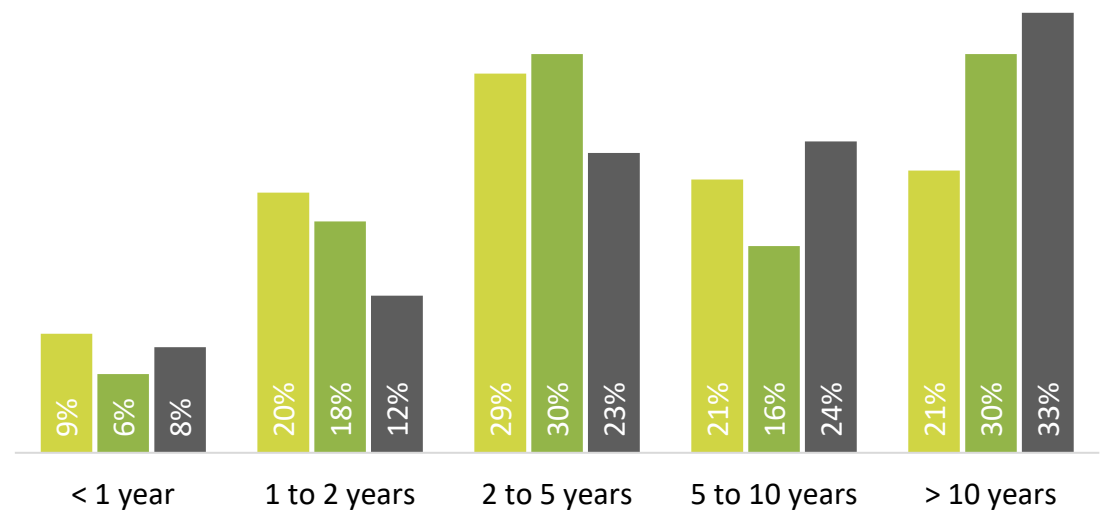
■ Advertisers ■ Agencies ■ Media



WORKING EXPERIENCE : How long have you been in your current job?
COMPANY SIZE : How many workers does your company count?

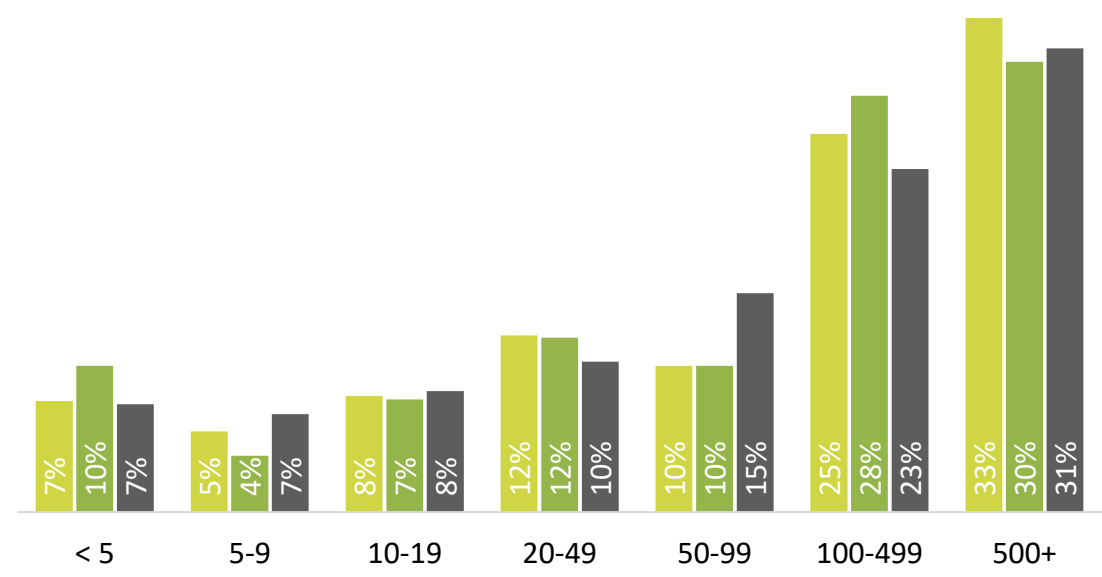
Working experience
Advertisers

■ W8 (n=298) ■ W9 (n=267) ■ W10 (n=460)



Number of employees
Advertisers

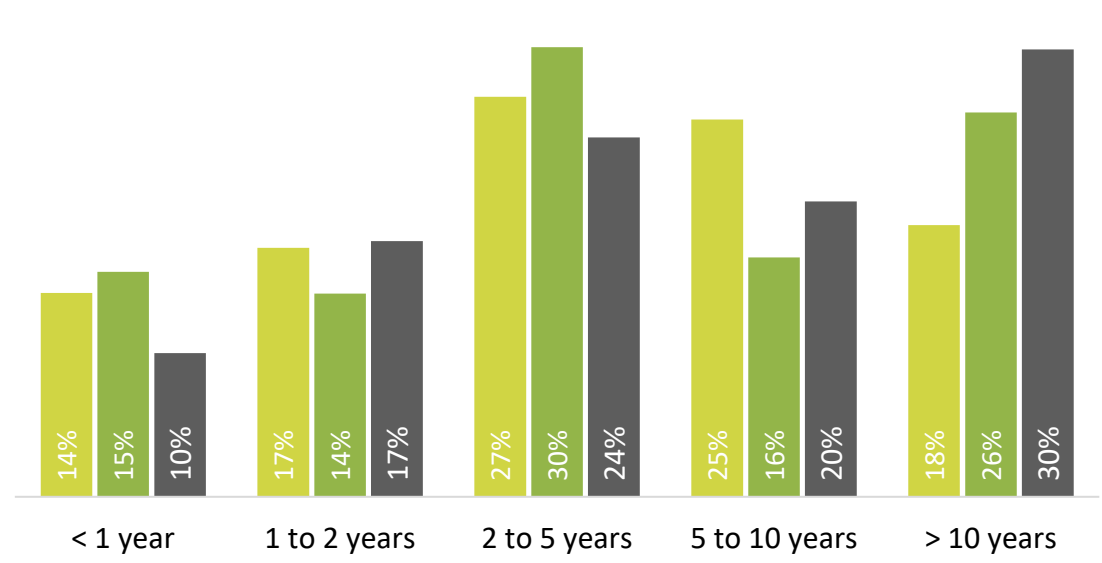
■ W8 (n=298) ■ W9 (n=267) ■ W10 (n=460)



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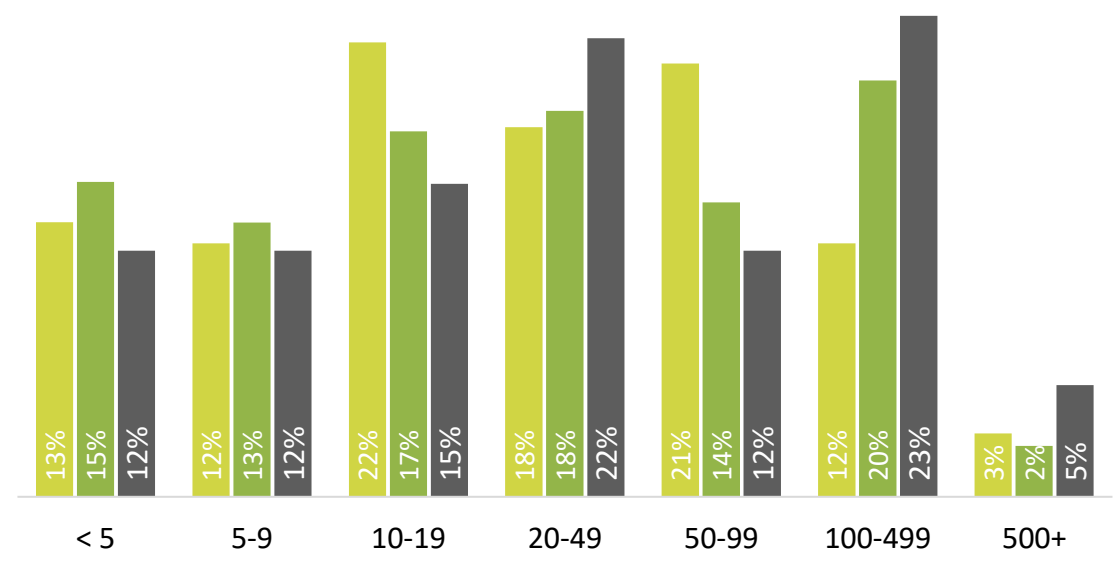
Working experience
Agencies

■ W8 (n=199) ■ W9 (n=207) ■ W10 (n=188)



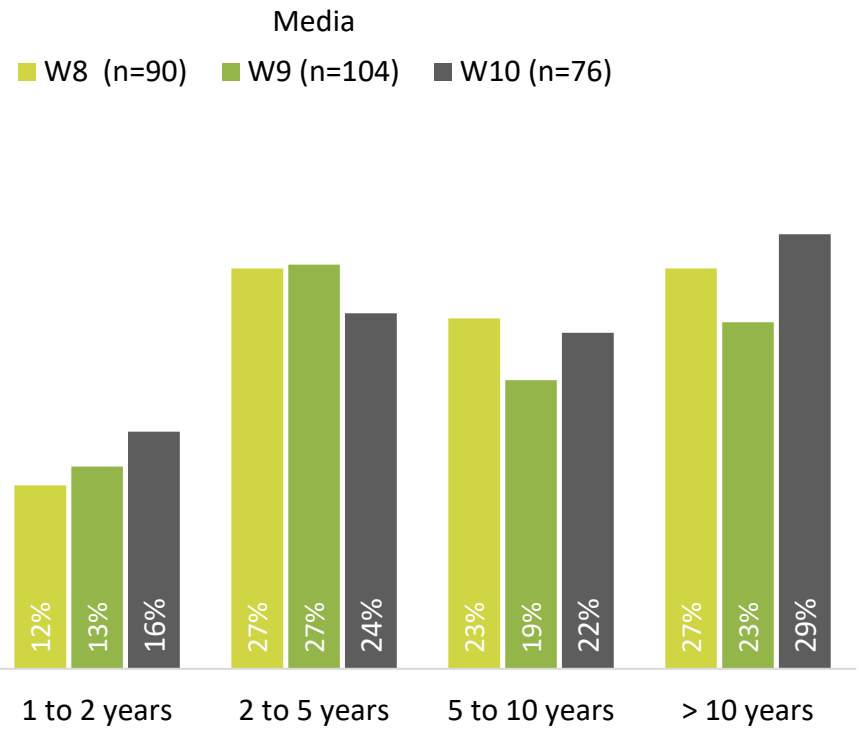
Number of employees
Agencies

■ Wave 8 (n=199) ■ W9 (n=207) ■ W10 (n=188)

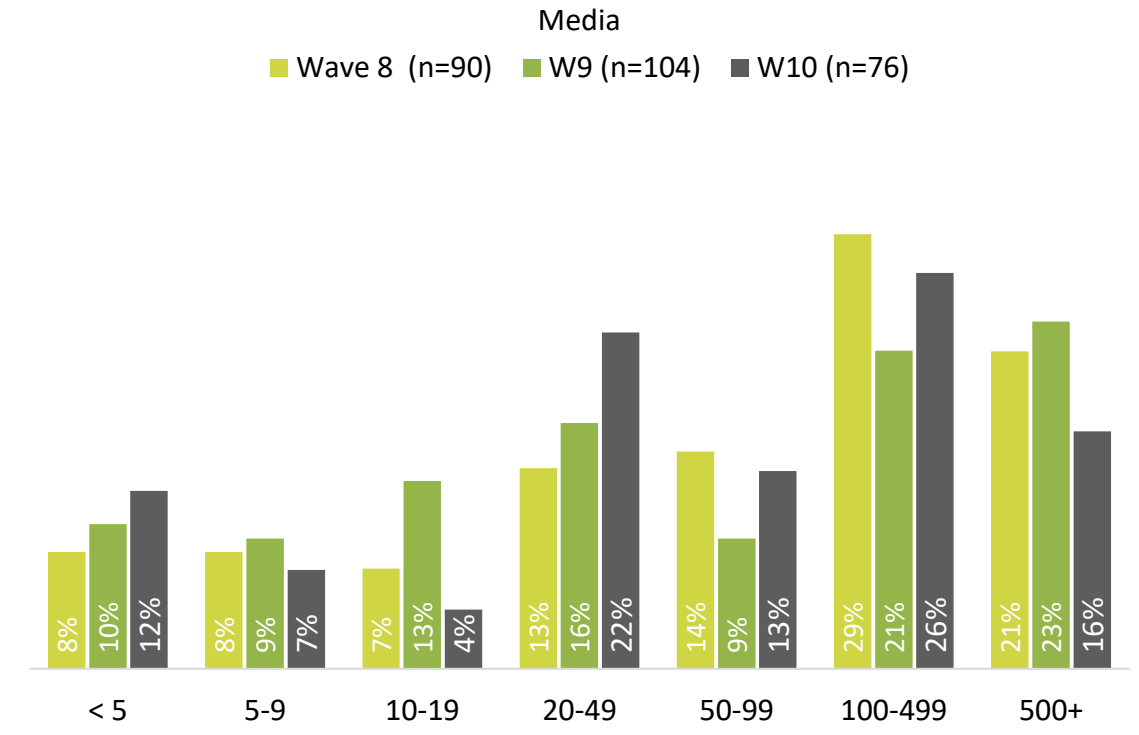


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Working experience

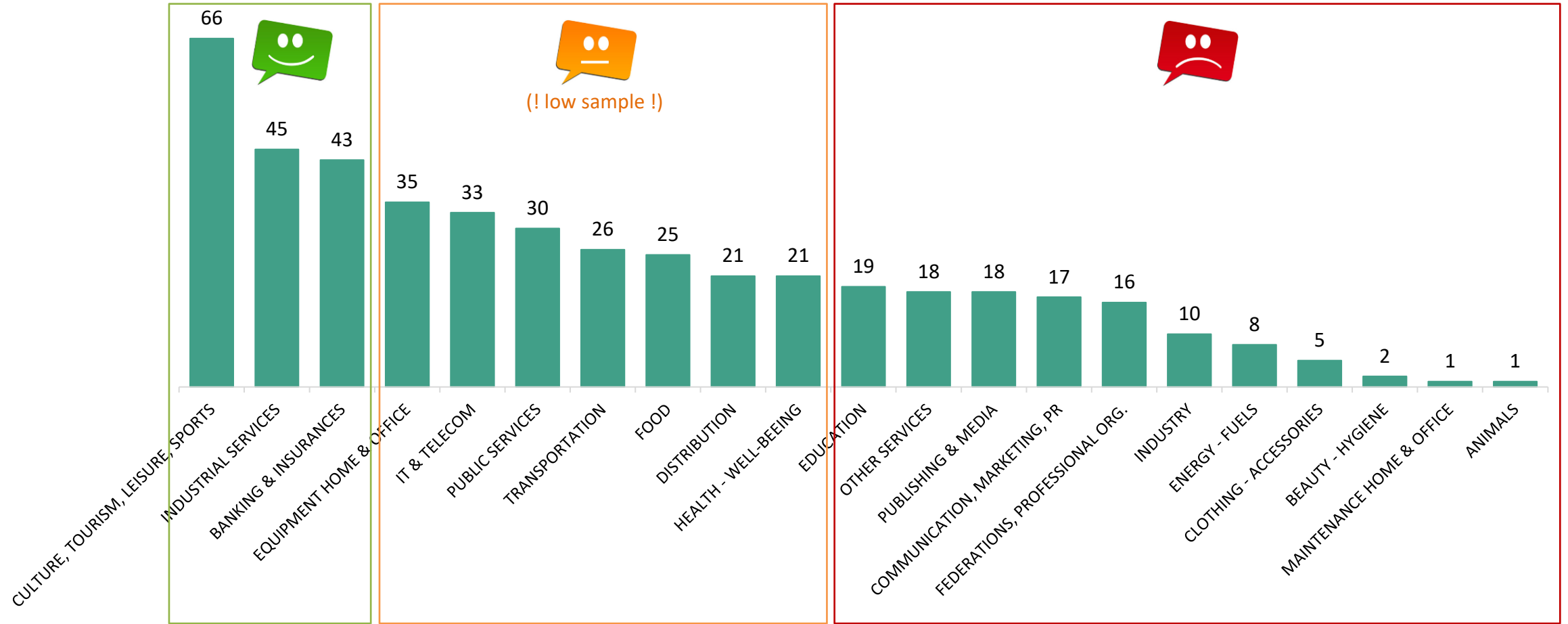


Number of employees



Number of interviews per sector

Advertisers (n=460)

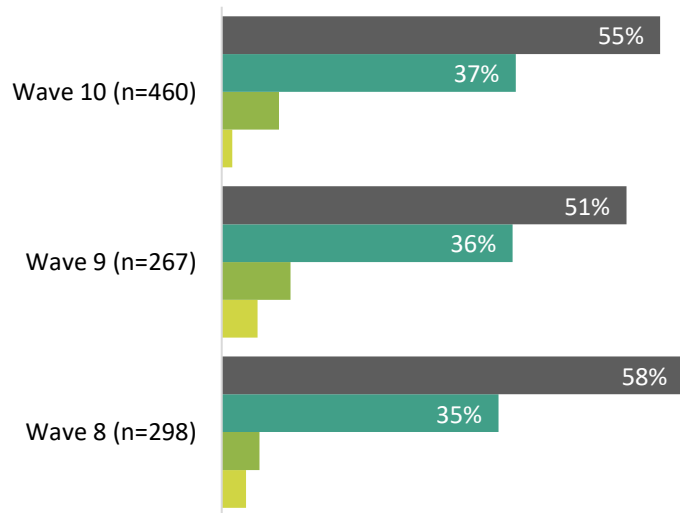


ADVERTISERS & MEDIA : To what extent are you involved in the decision-making process regarding the communication budgets of your brands?
 AGENCIES : To what extent are you involved in the decision process regarding your clients' communication budgets?

Advertisers



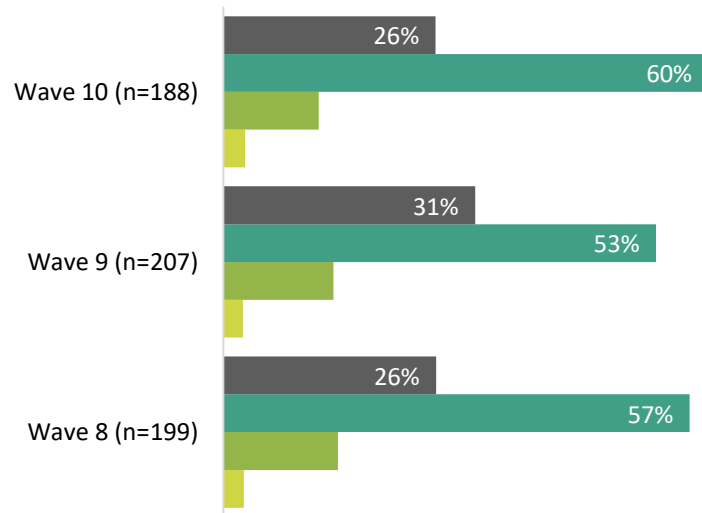
■ Fully involved ■ Partly involved ■ Not involved ■ Not applicable



Agencies



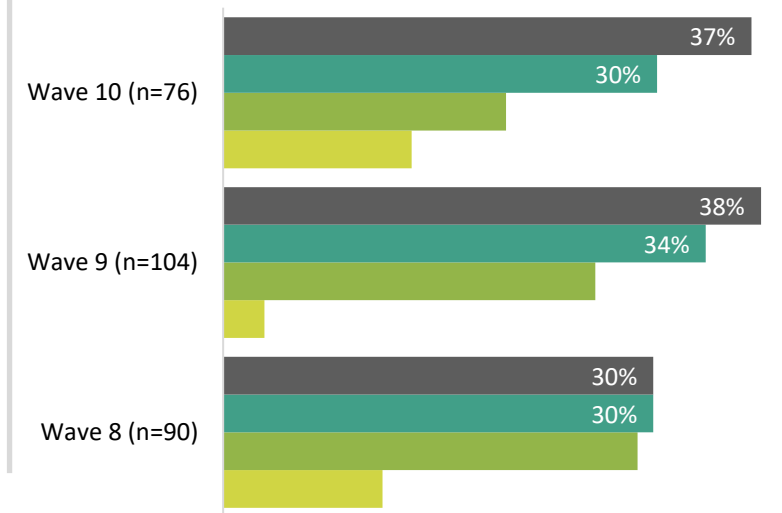
■ Fully involved ■ Partly involved ■ Not involved ■ Not applicable



Media



■ Fully involved ■ Partly involved ■ Not involved ■ Not applicable



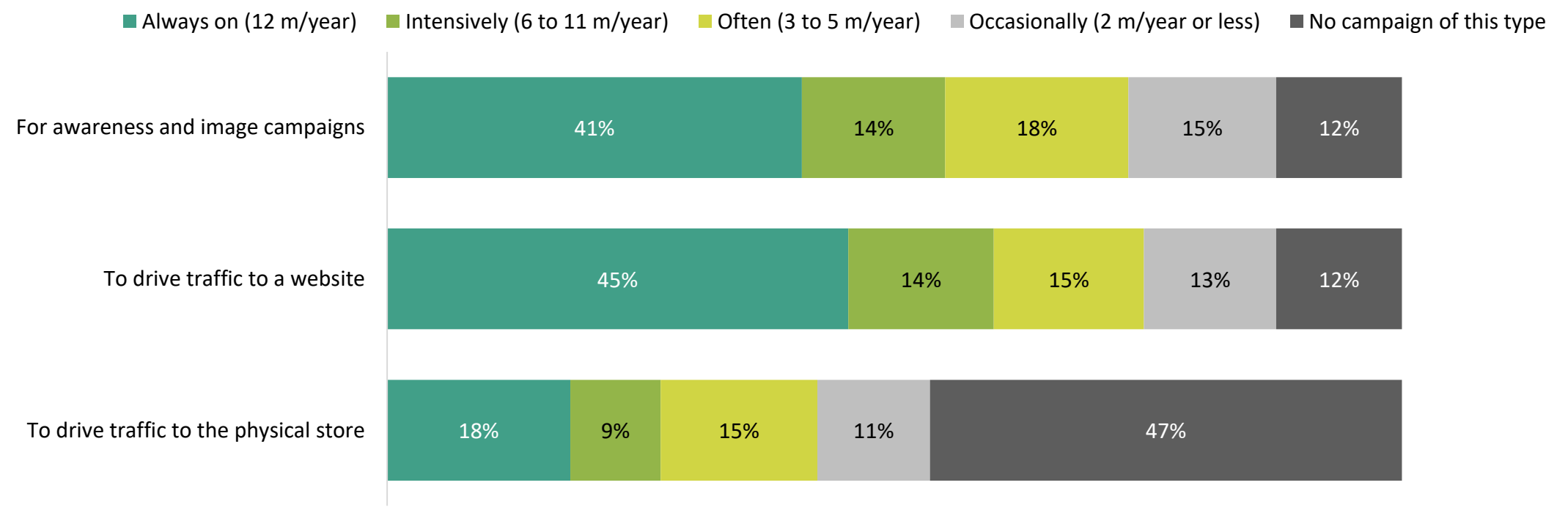
2 / Frequency according to communication task

Drive to web & Awareness remain **key objectives** in terms of use of digital

In 2019, how often did you use digital channels for each of the following types of campaign?

Frequency of use per type of campaign

Advertisers (n=460)



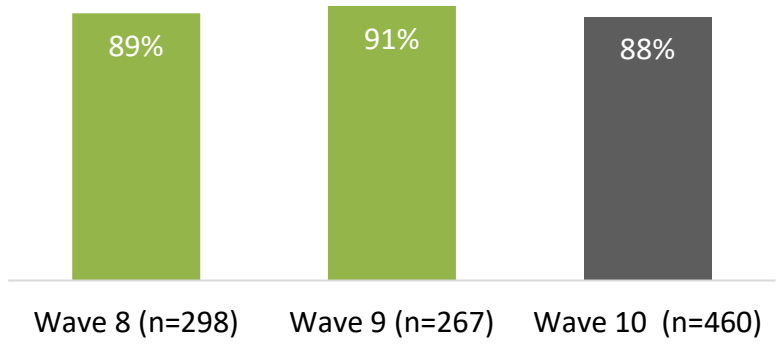
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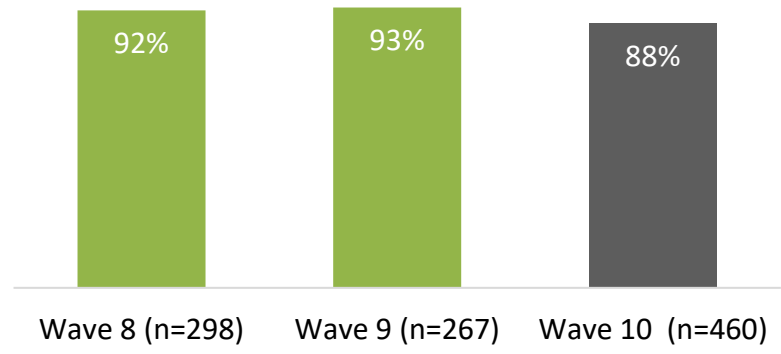
Awareness and image

Advertisers



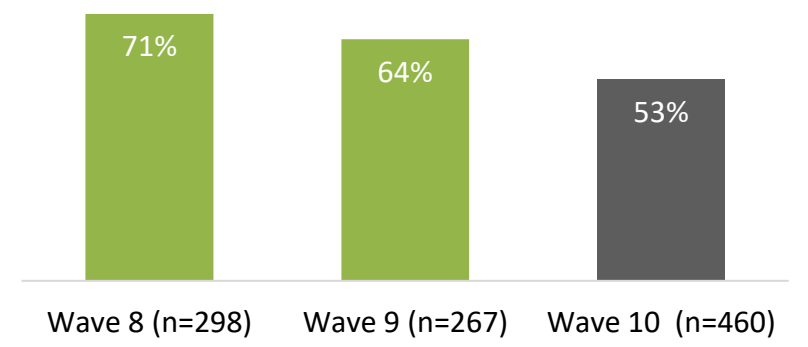
Drive to web activation

Advertisers



Drive to store activation

Advertisers



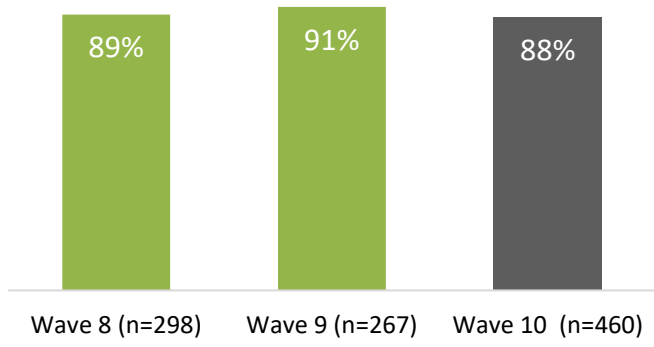
Drive to web & Awareness remain **key objectives** in terms of use of digital

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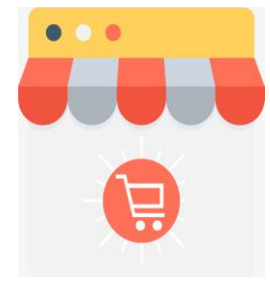
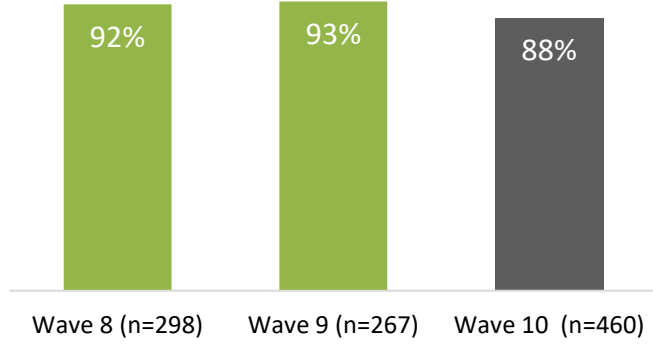
Awareness and image

Advertisers



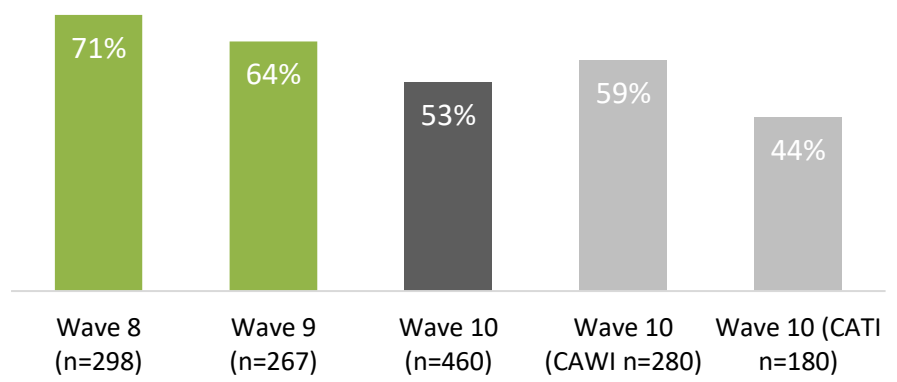
Drive to web activation

Advertisers



Drive to store activation

Advertisers



1/3 advertiser goes **always on** for drive-to-web and awareness campaigns

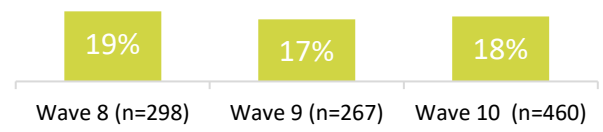
In 2019, how often did you use digital channels for each of the following types of campaign?

Matrix 2018 (n=298)
Matrix 2019 (n=267)
Matrix 2020 (n=460)

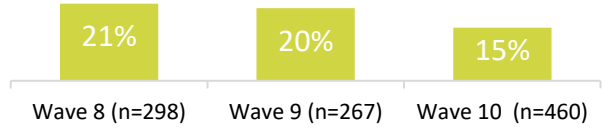
Often
3-5 months per year



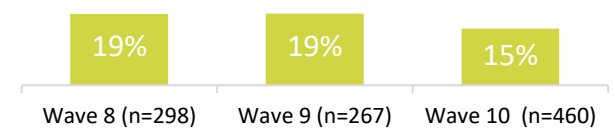
Awareness and image Advertisers



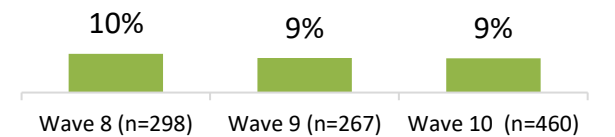
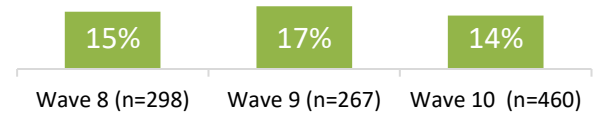
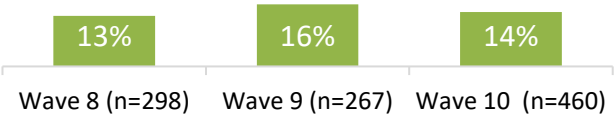
Drive to web activation Advertisers



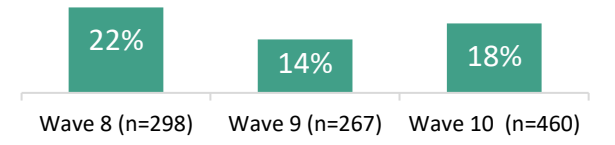
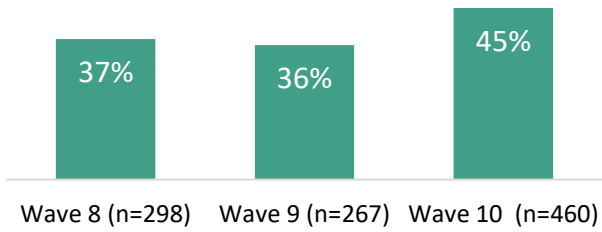
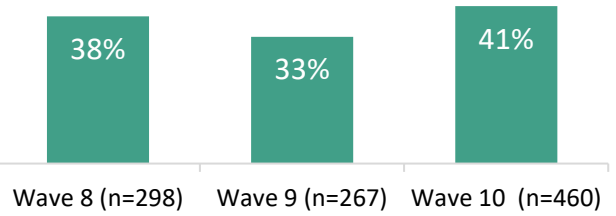
Drive to store activation Advertisers



Intensively
6-11 months per year



Always on
12 months per year

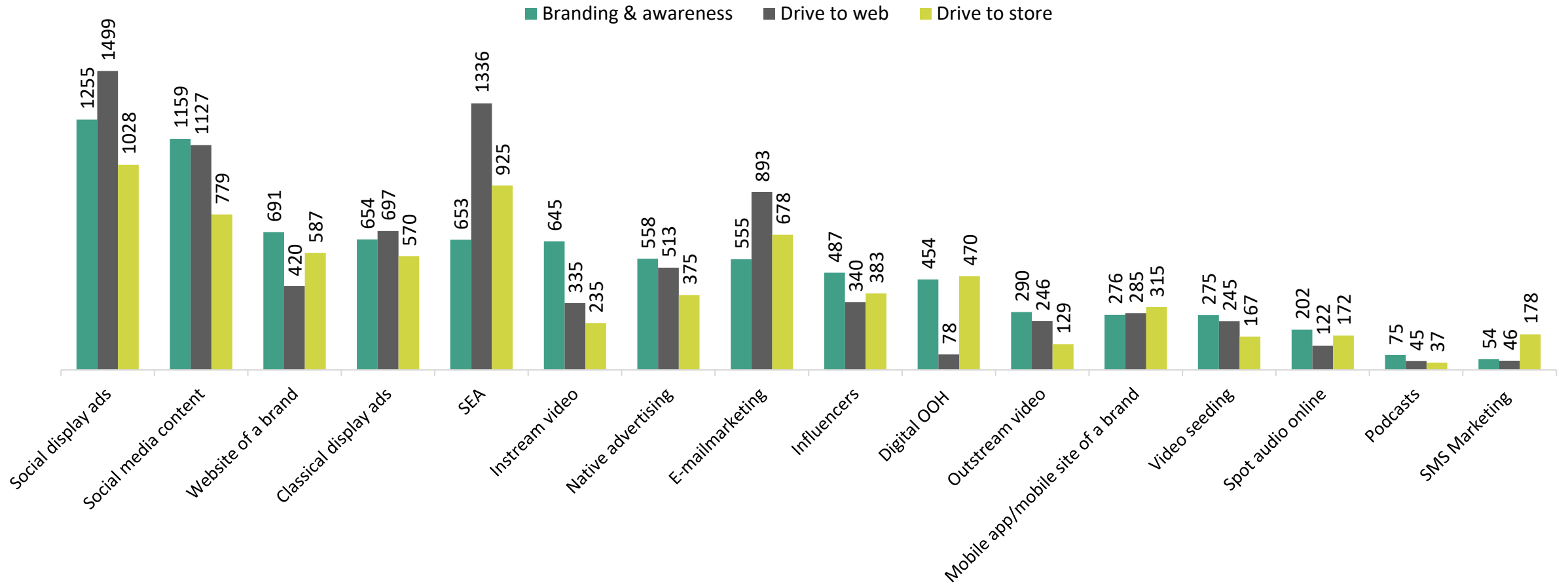


3 / Efficiency of digital touchpoints

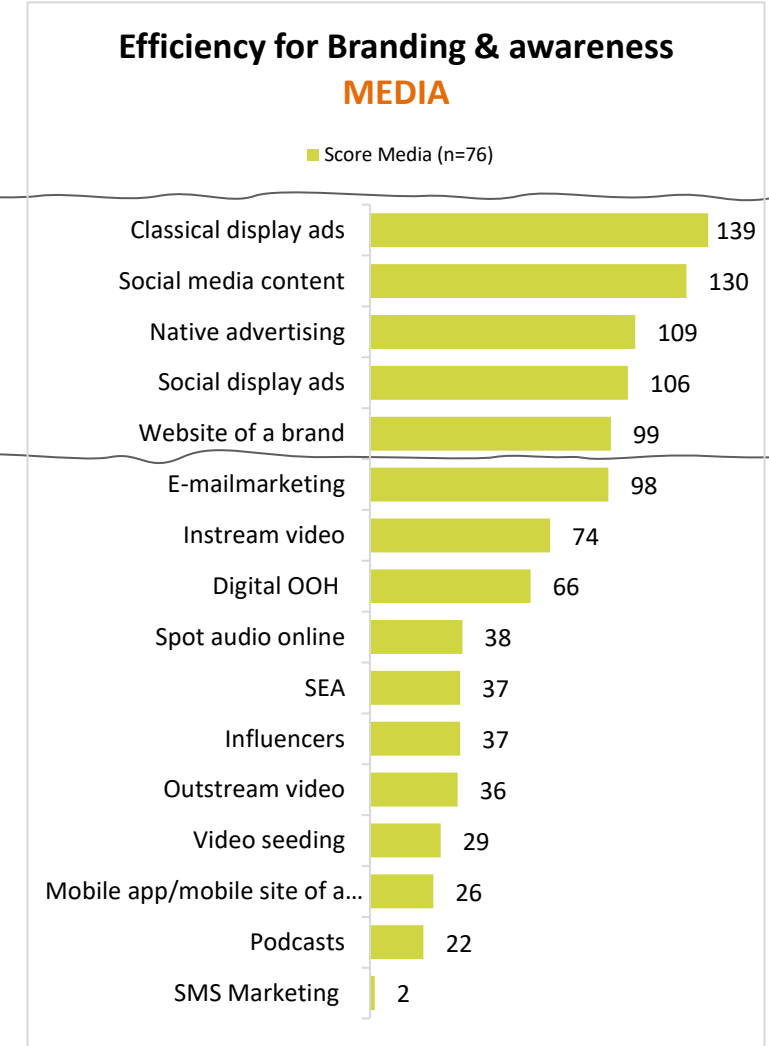
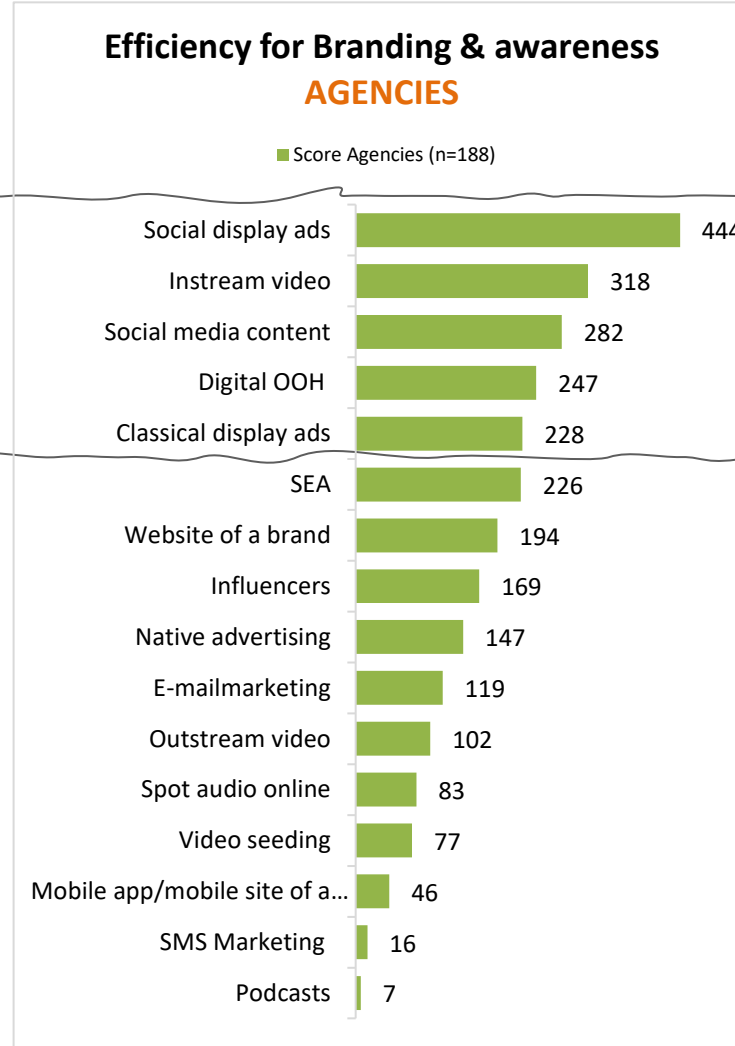
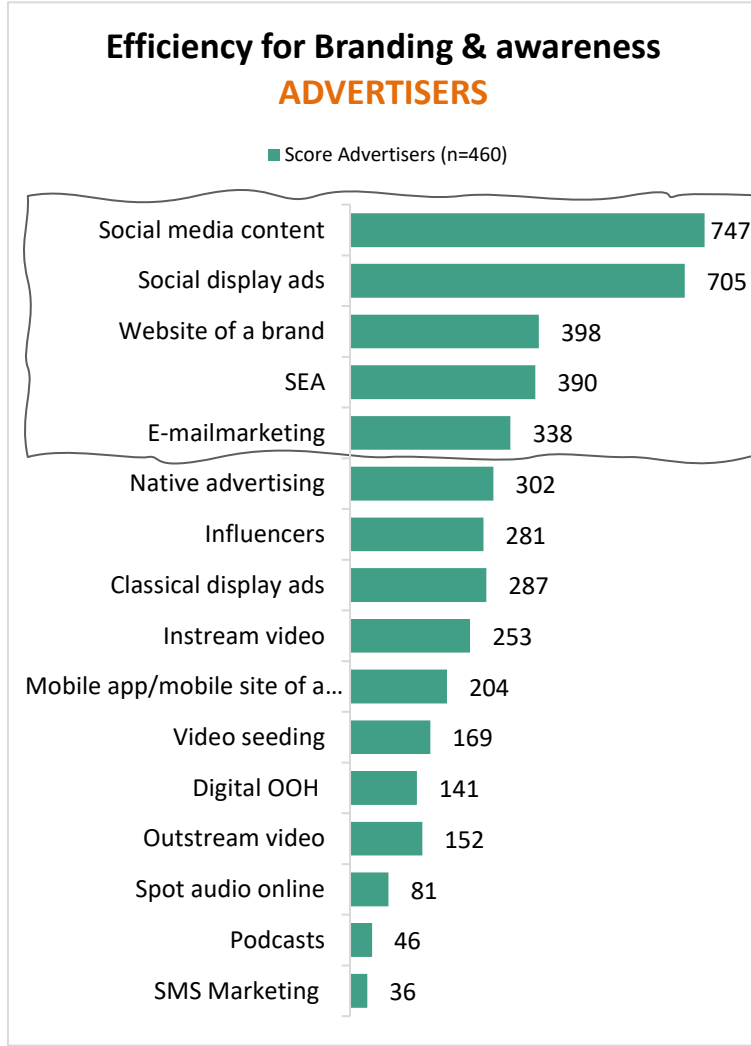
Here is a list of digital channels that you can use in connection with the communication of your brands. Please select in order those which you consider to be the most effective according to the objectives pursued.

Efficiency of digital TP according to communication task

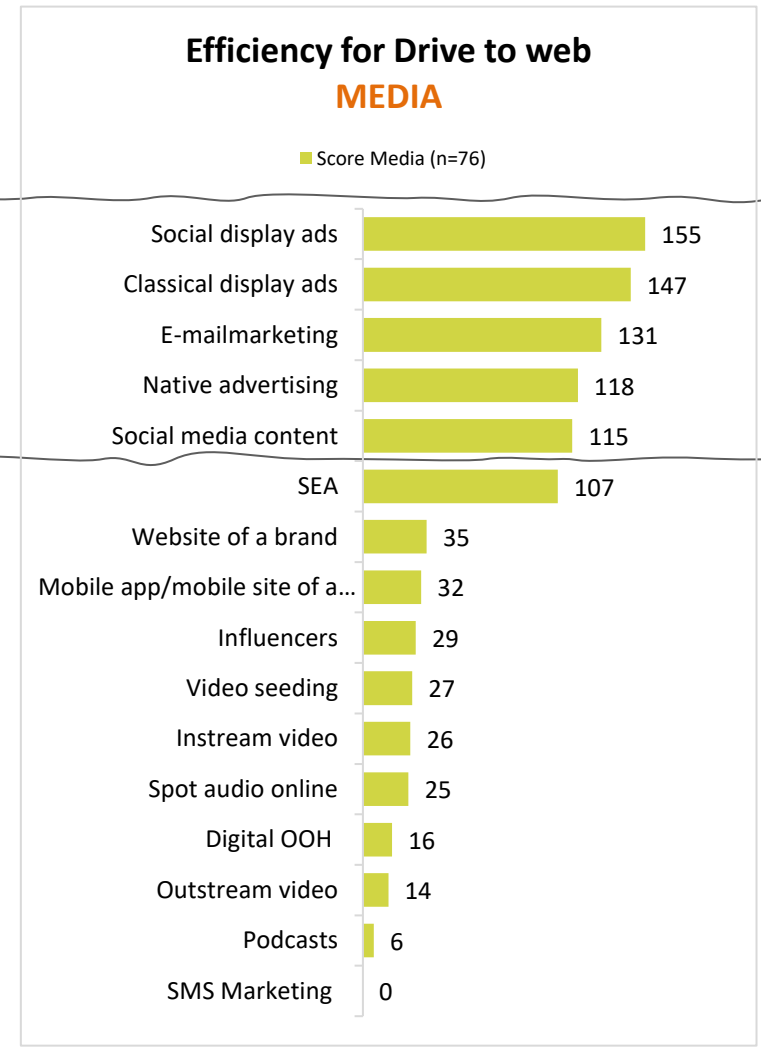
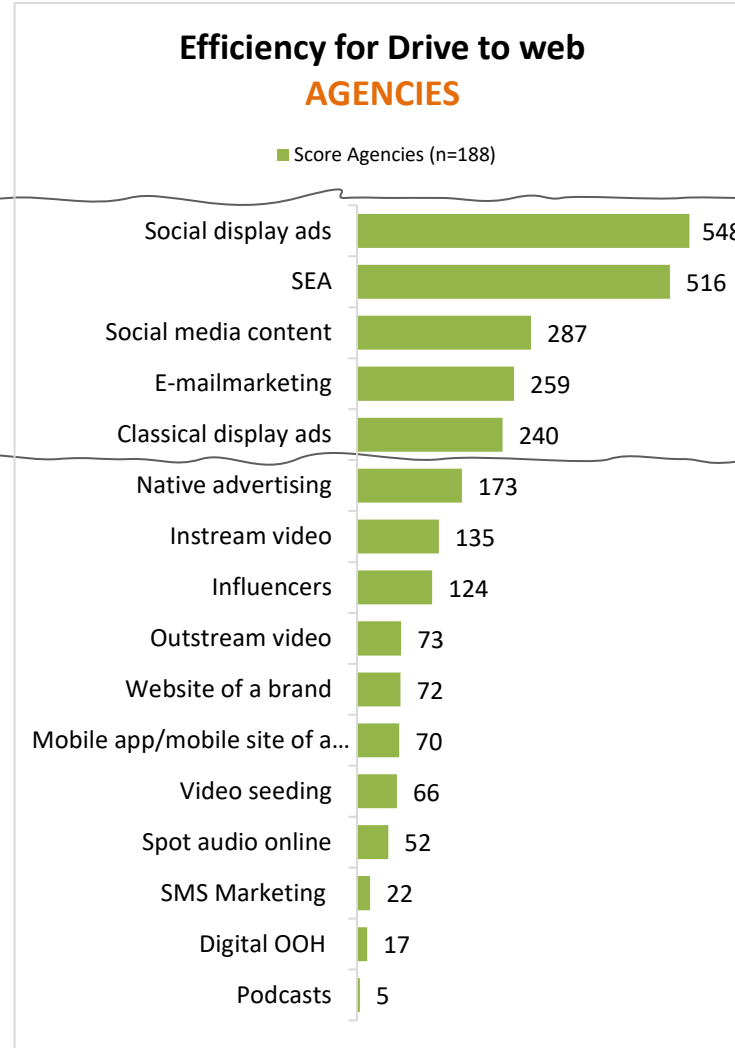
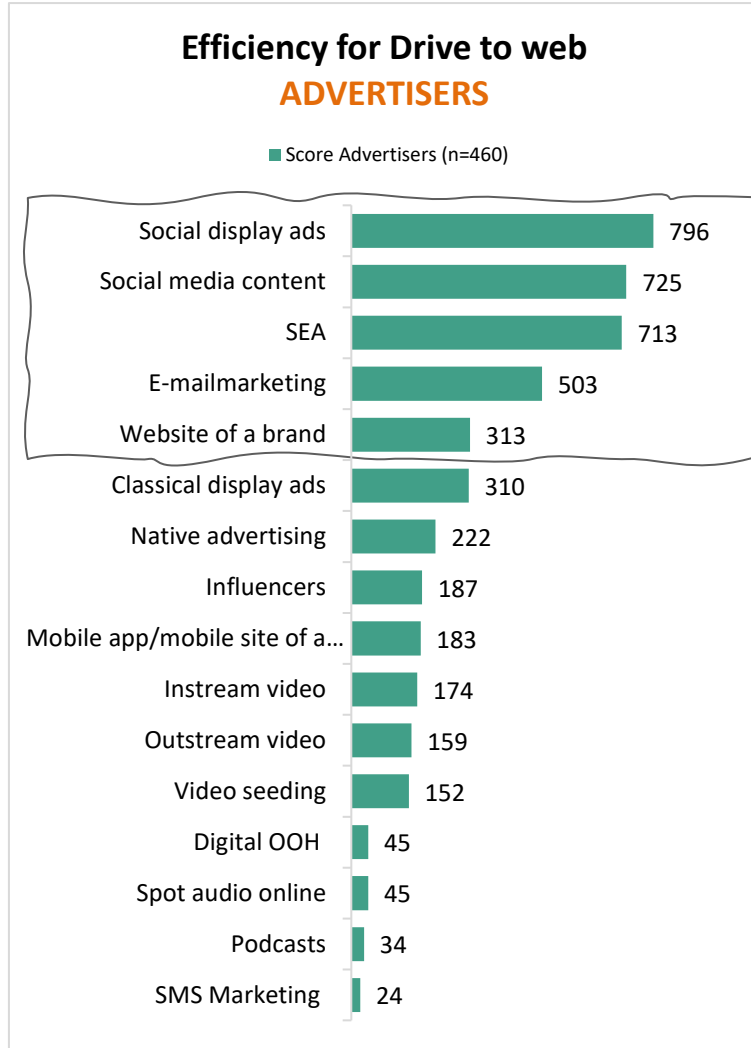
Score Total population (n=724)
Ranking : Branding & awareness



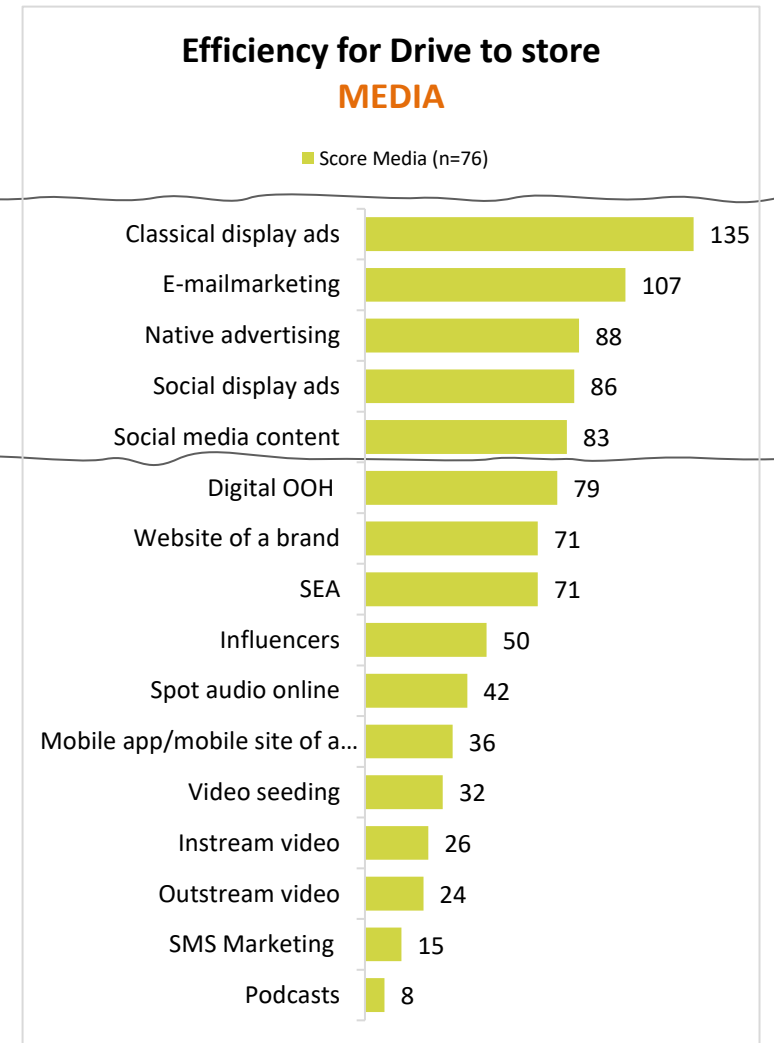
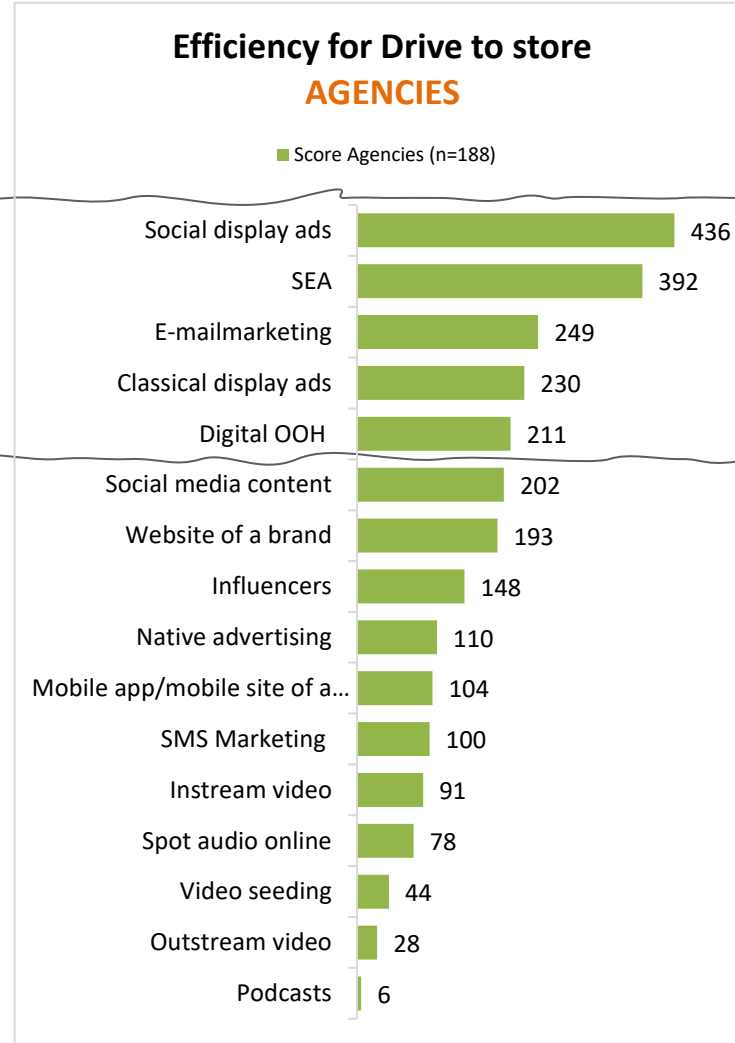
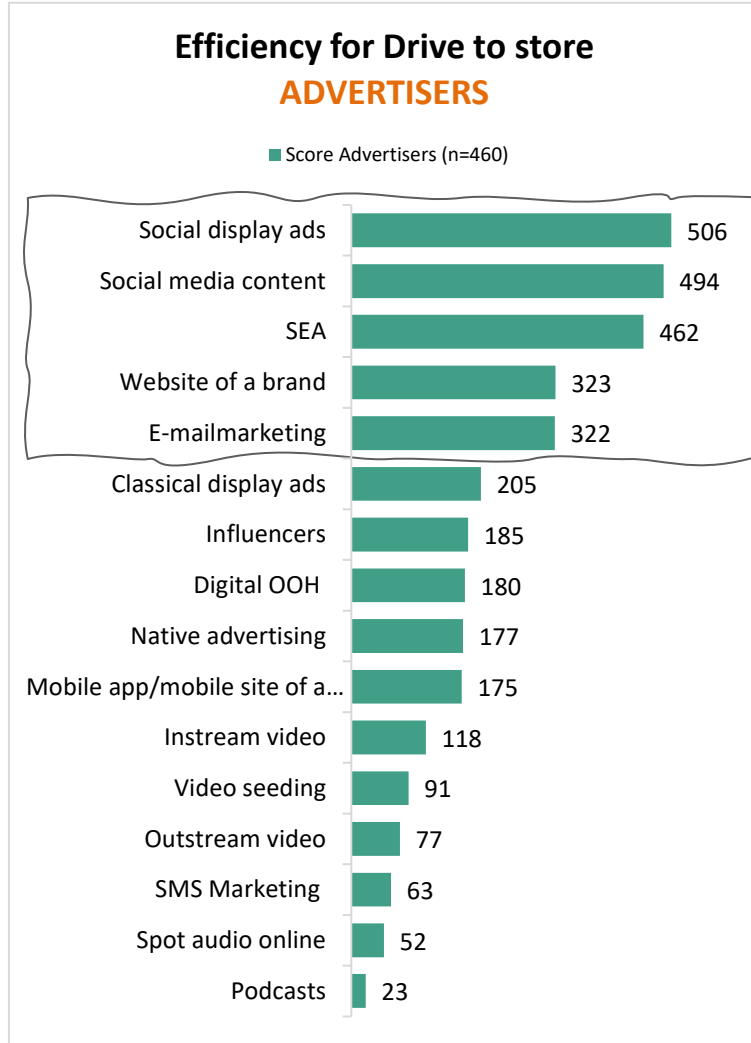
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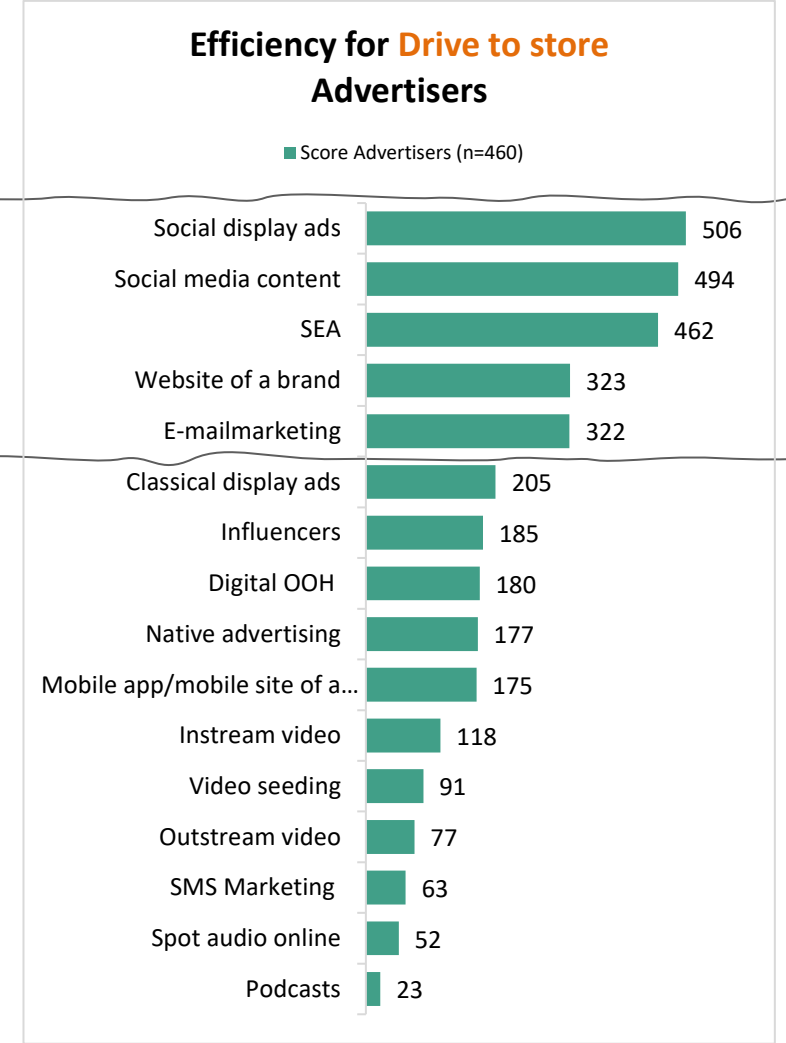
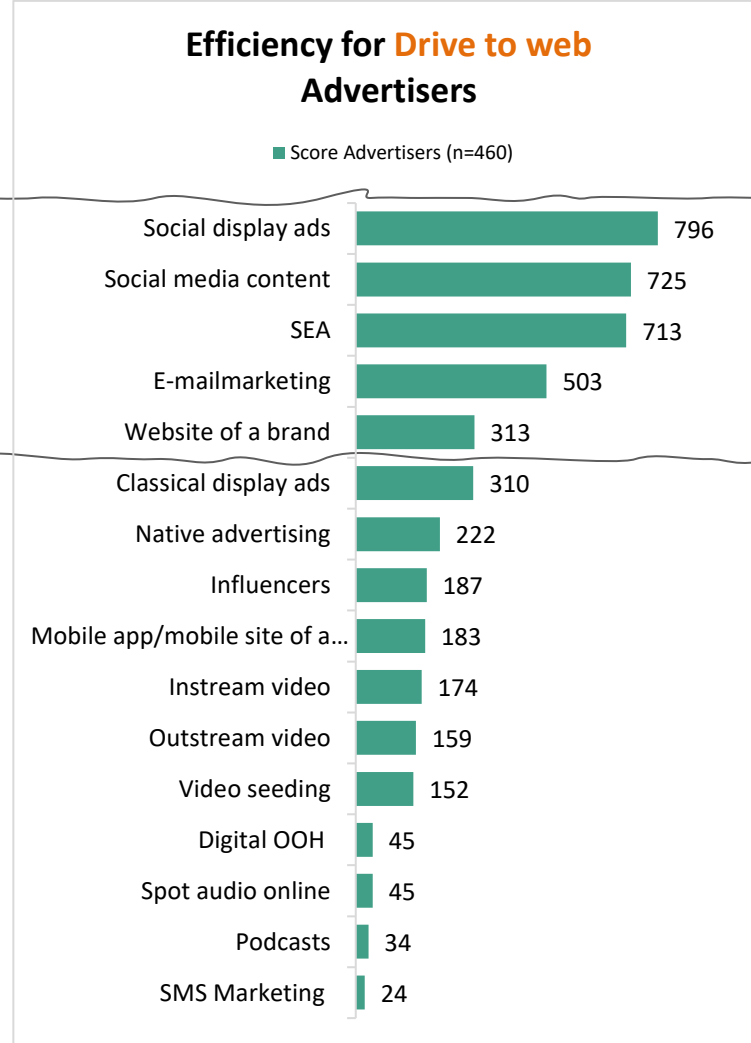
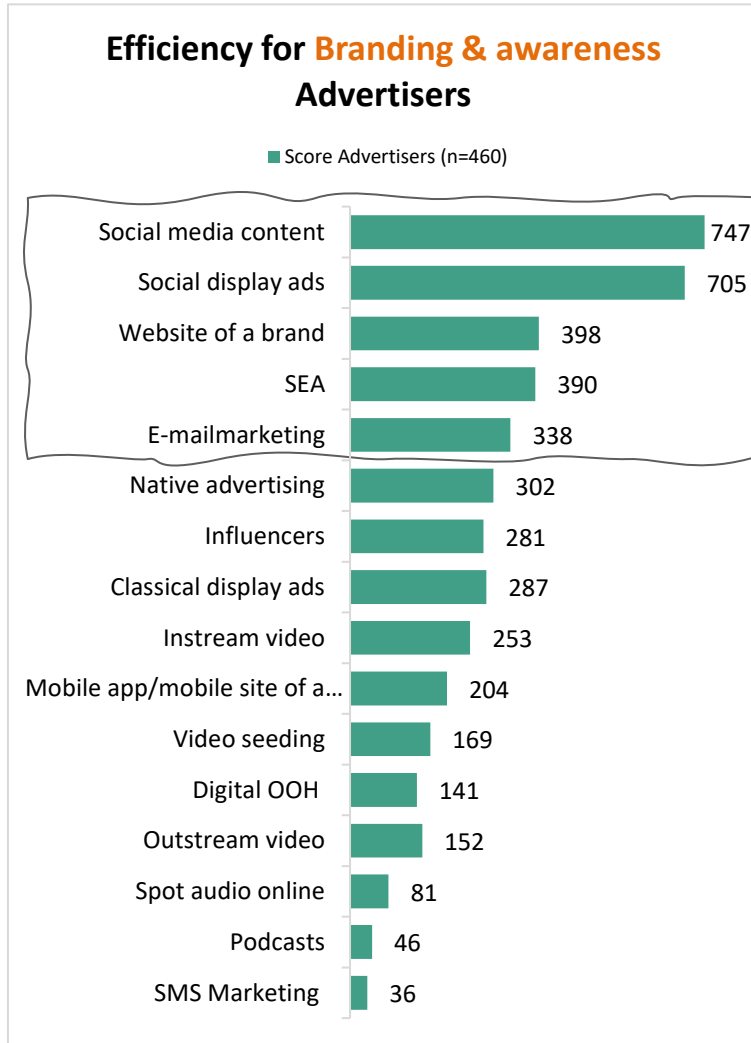
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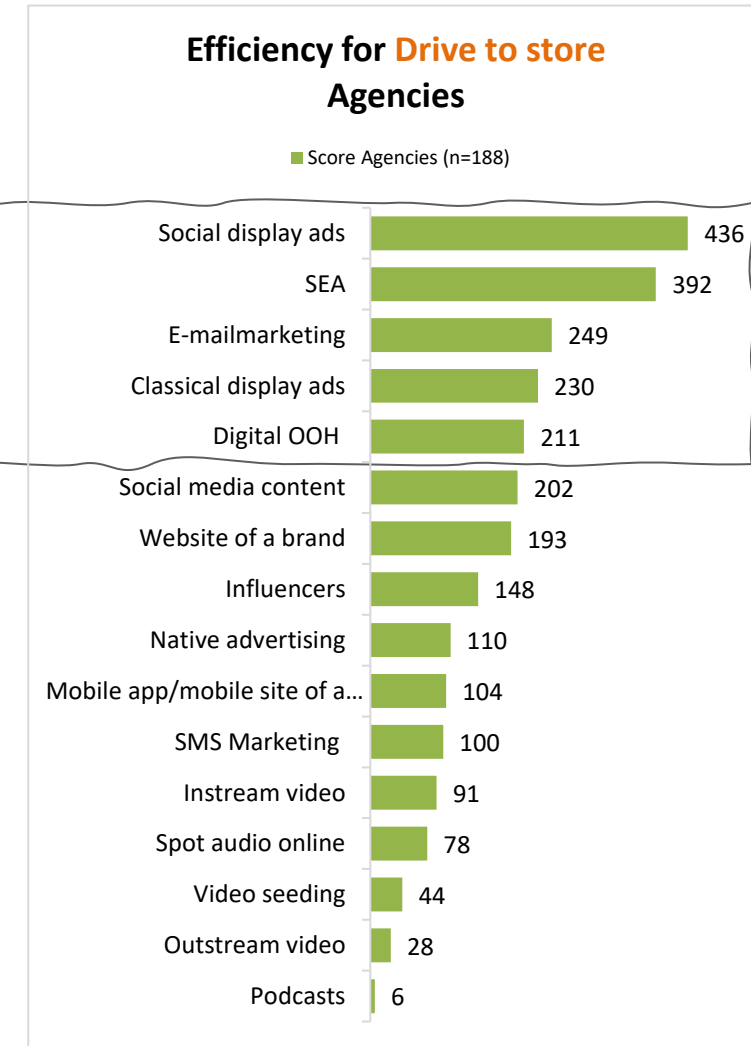
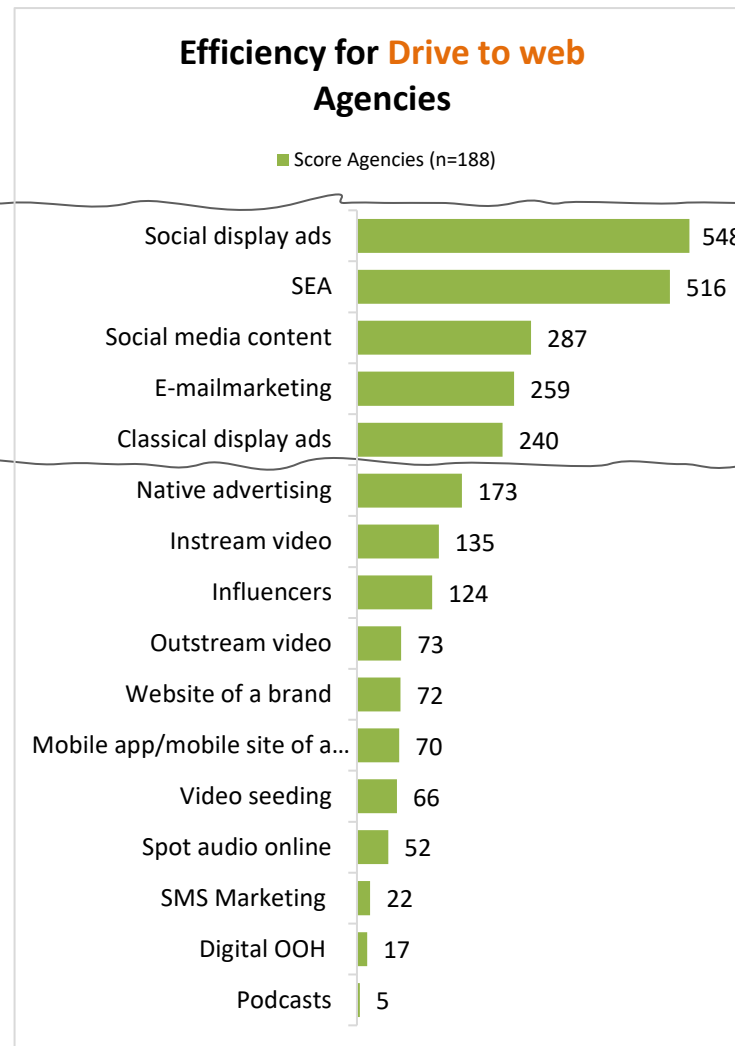
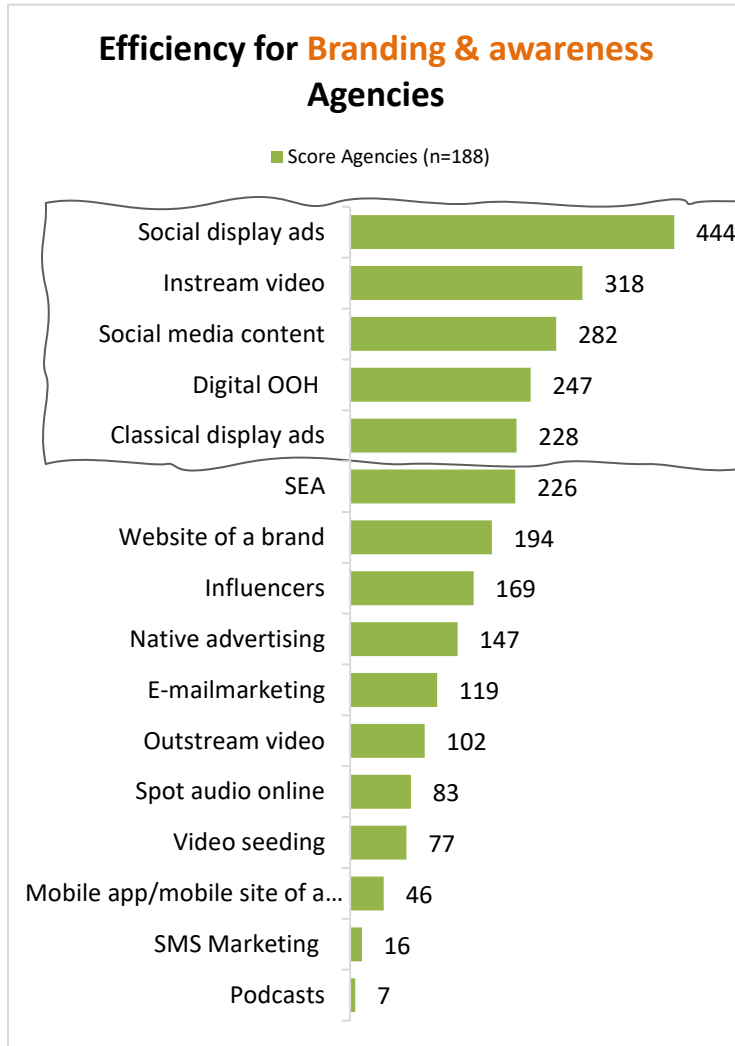
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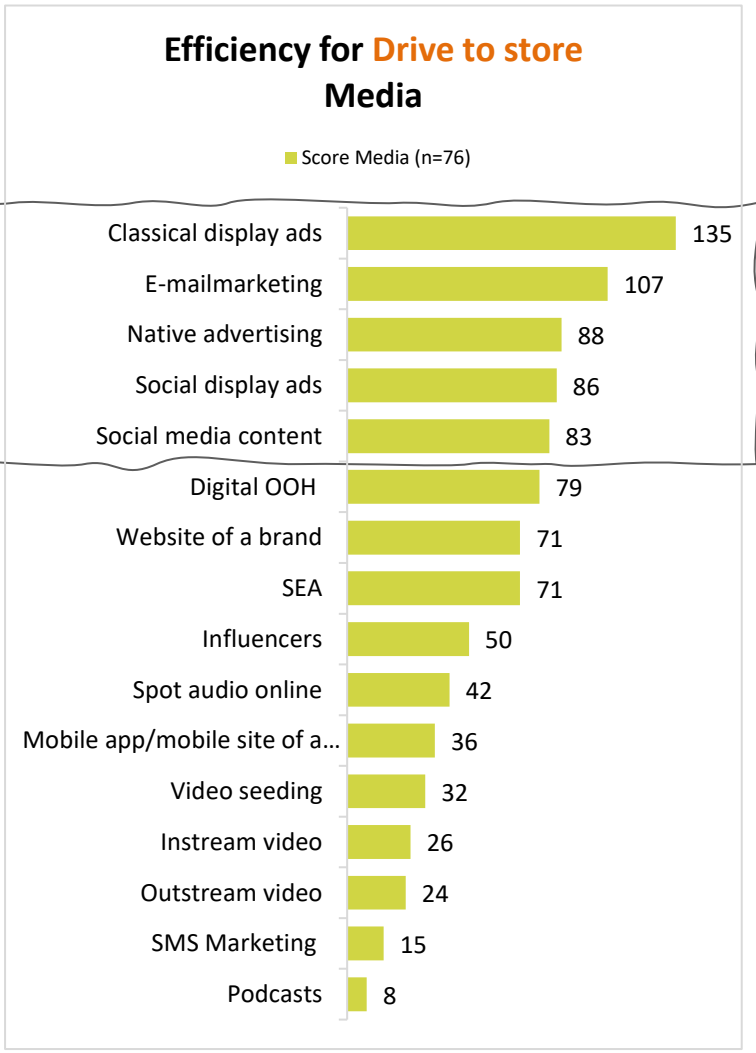
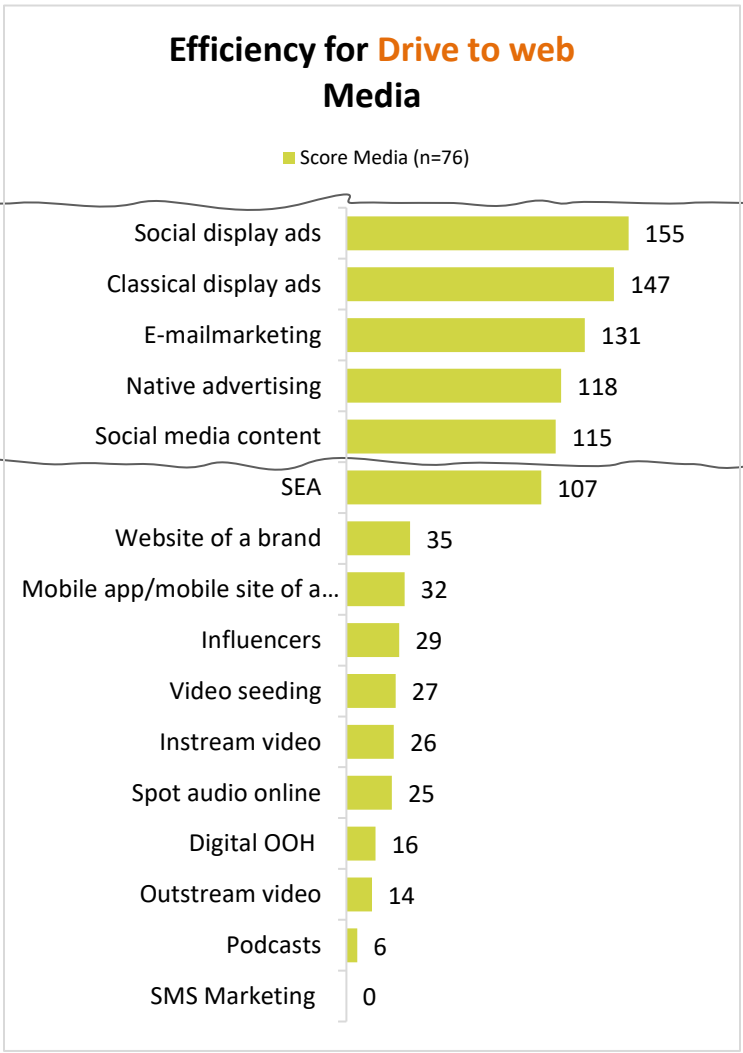
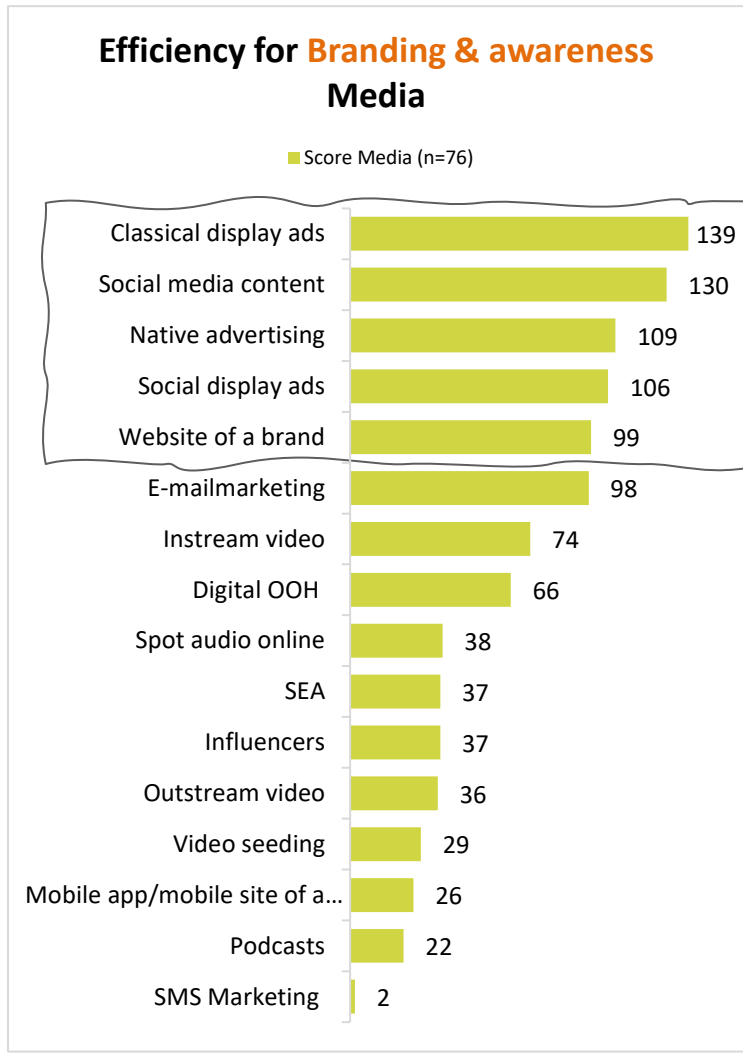
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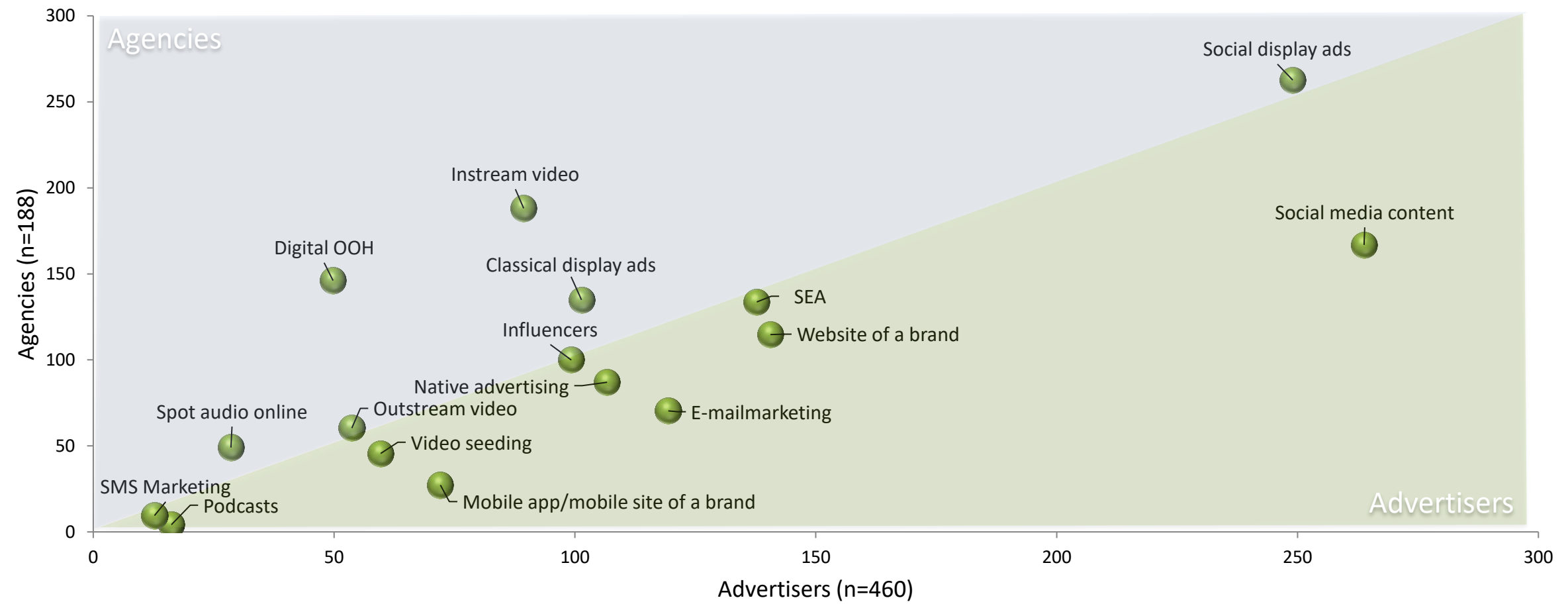
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Efficiency of digital TP : Branding & awareness

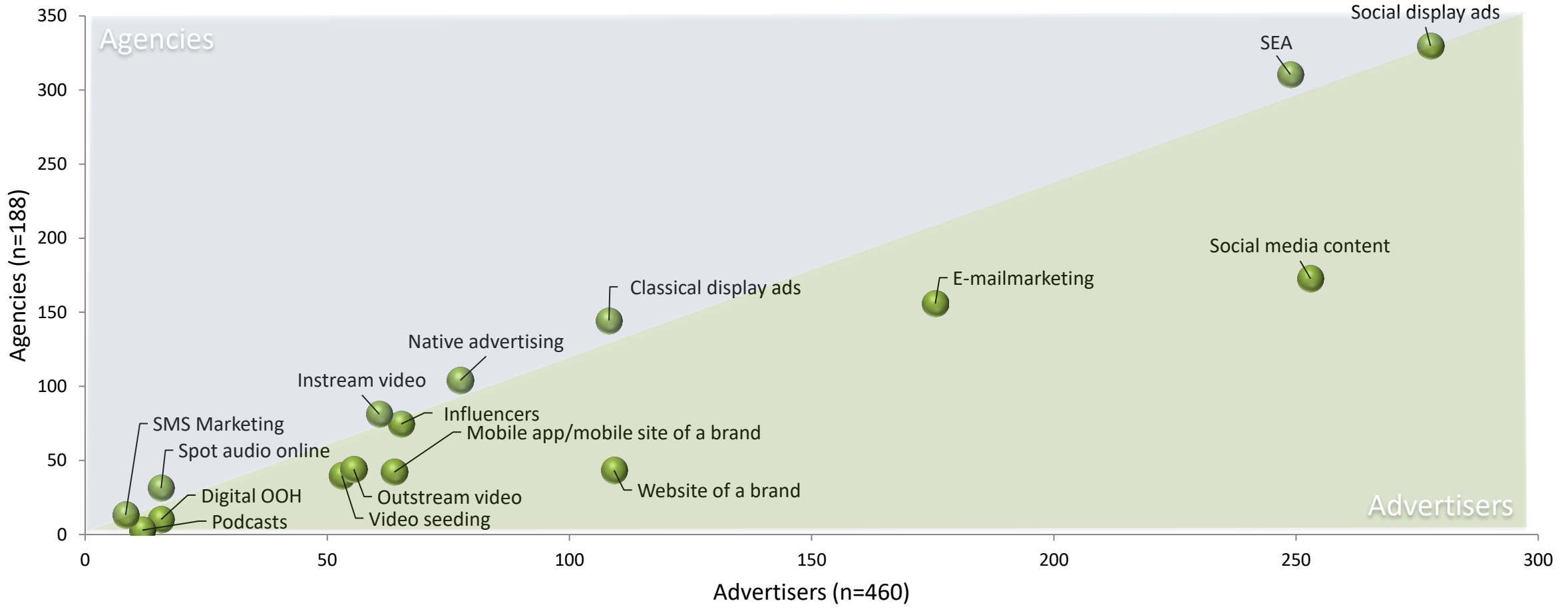
Selectivity



Here is a list of digital channels that you can use in connection with the communication of your brands. Please select in order those which you consider to be the most effective according to the objectives pursued.

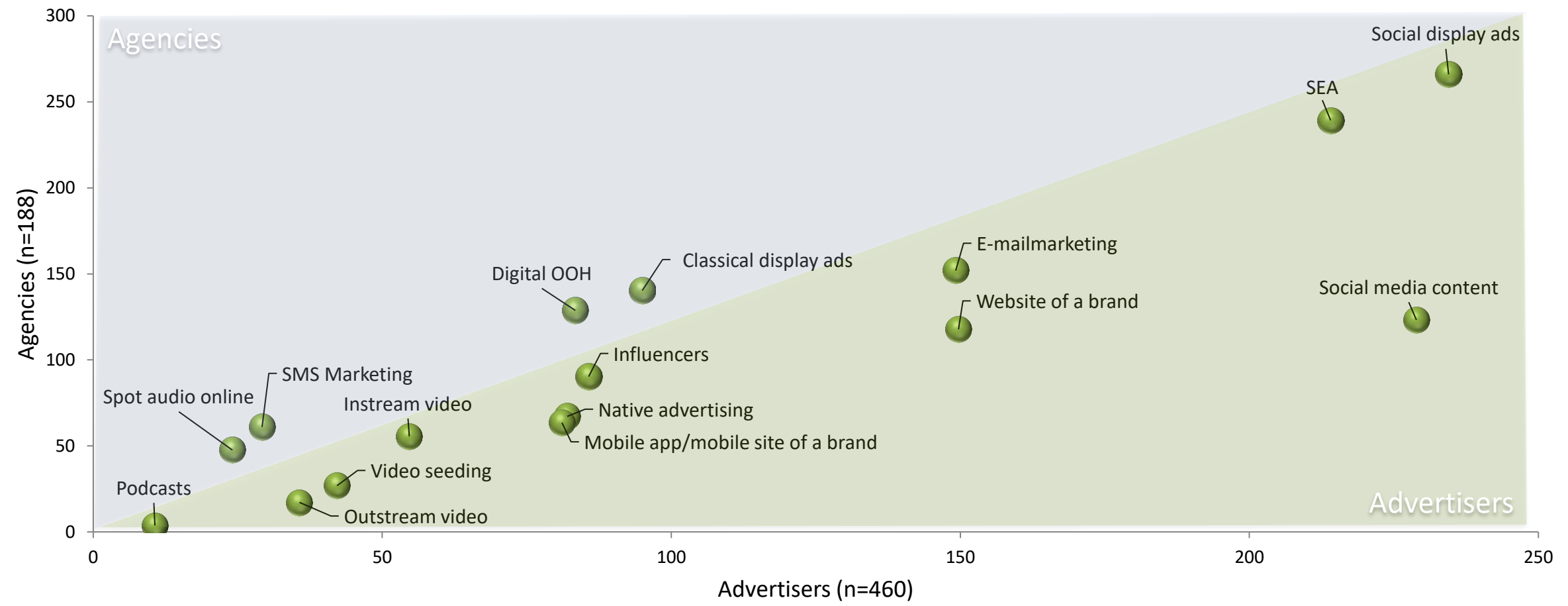
Efficiency of digital TP : Drive-to-Web

Selectivity



Here is a list of digital channels that you can use in connection with the communication of your brands. Please select in order those which you consider to be the most effective according to the objectives pursued.

Efficiency of digital TP : Drive-to-Store
Selectivity



4 / Online Media Ad spend

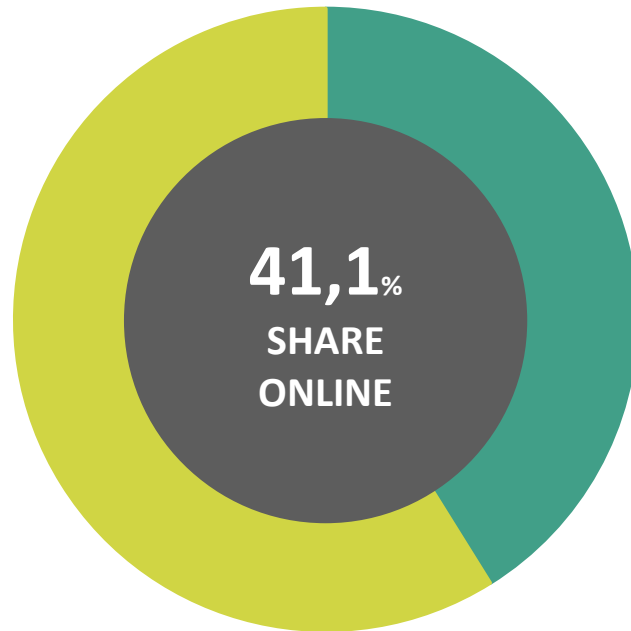
41,1% of the media mix went **digital** in 2019

*What is the budget you spent on communication in 2019, both online & offline?
And what was, in 2019, the distribution of these investments between digital media (online) and traditional media (offline)?*

Share of digital %

Advertisers (n= 460)

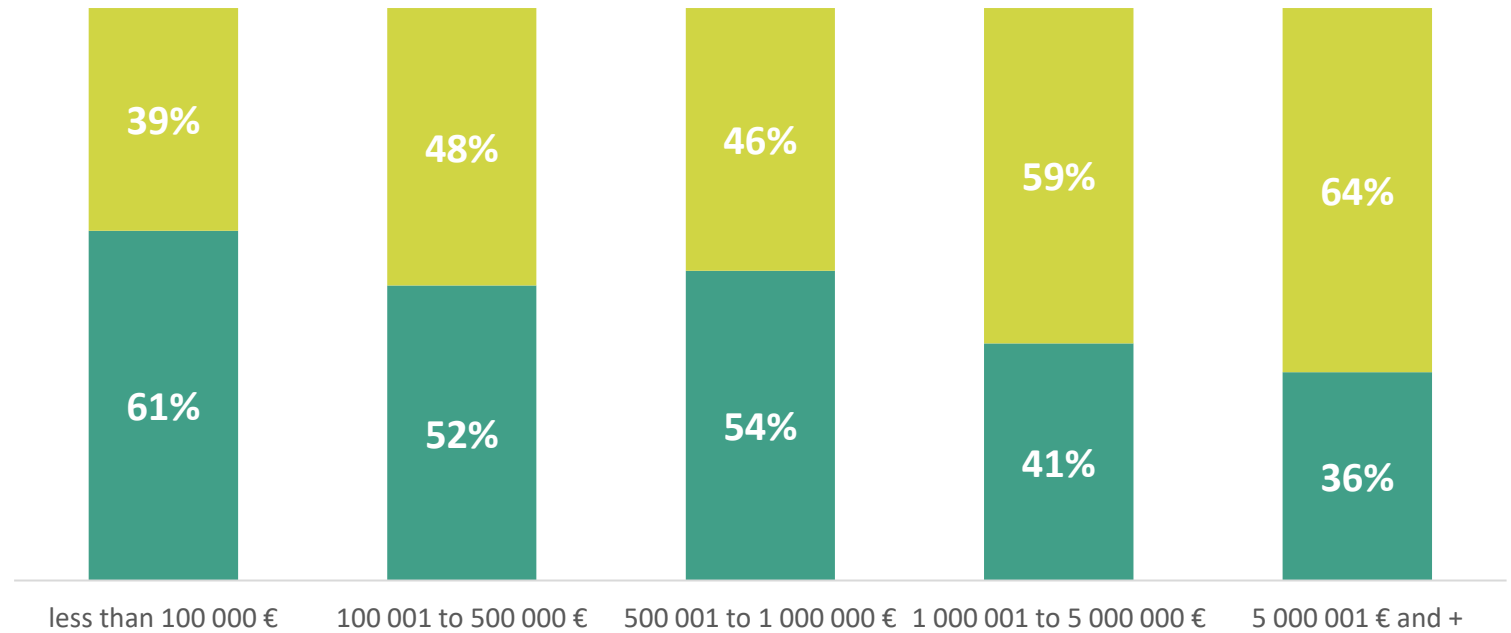
■ % online ■ % offline



Share of digital according to budget category

Advertisers (n=460)

■ % online ■ % offline



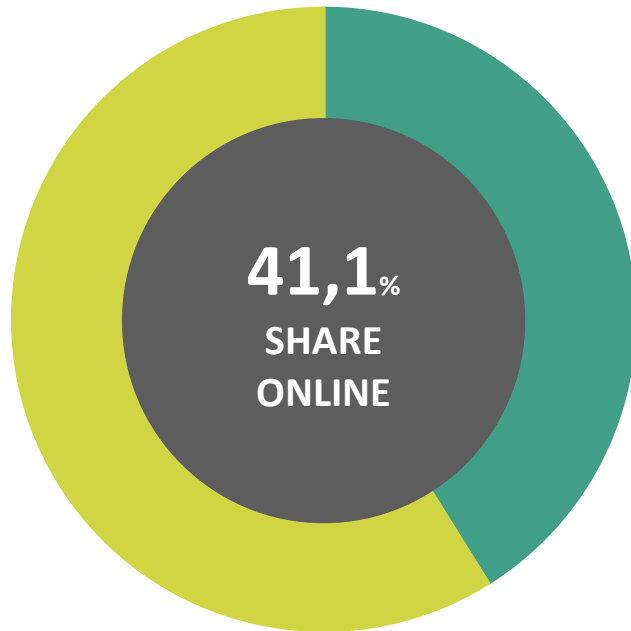
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Share of digital %

Advertisers (n= 460)

■ % online ■ % offline

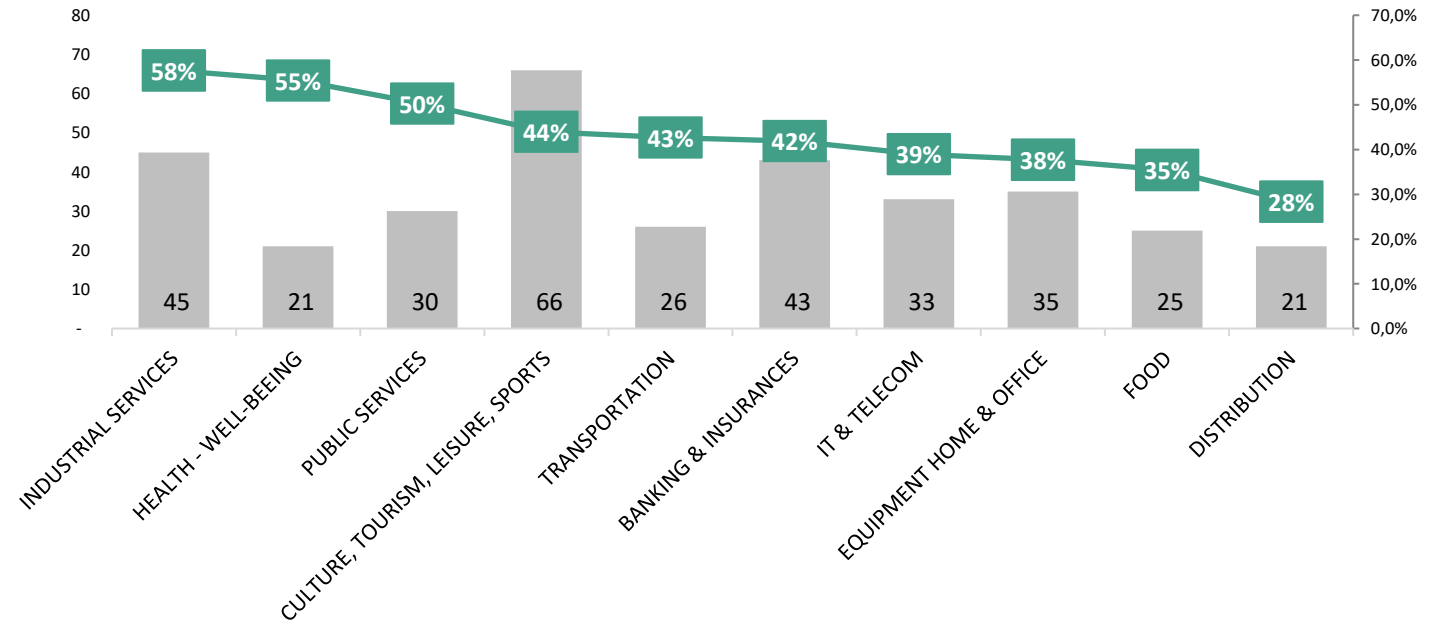


Share of digital according to sector

Advertisers (n>=20)

WARNING : Data shown for information only. Very low sample sizes!

■ Nb. respondents per sector ■ Share of digital (%)



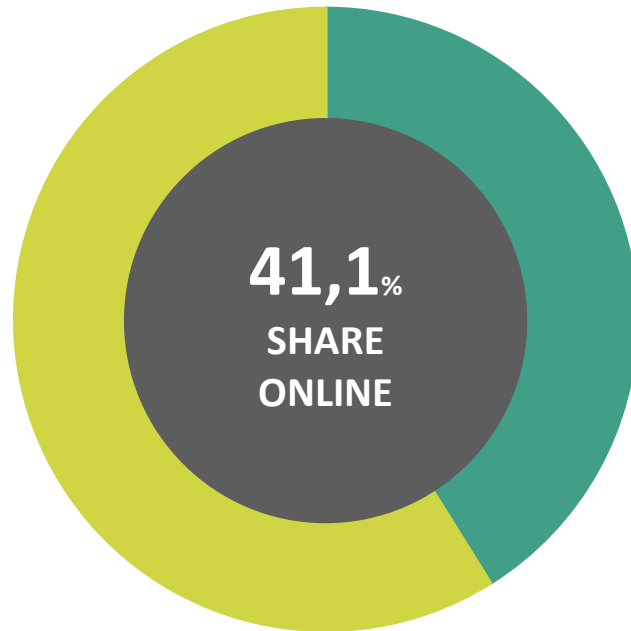
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Share of digital %

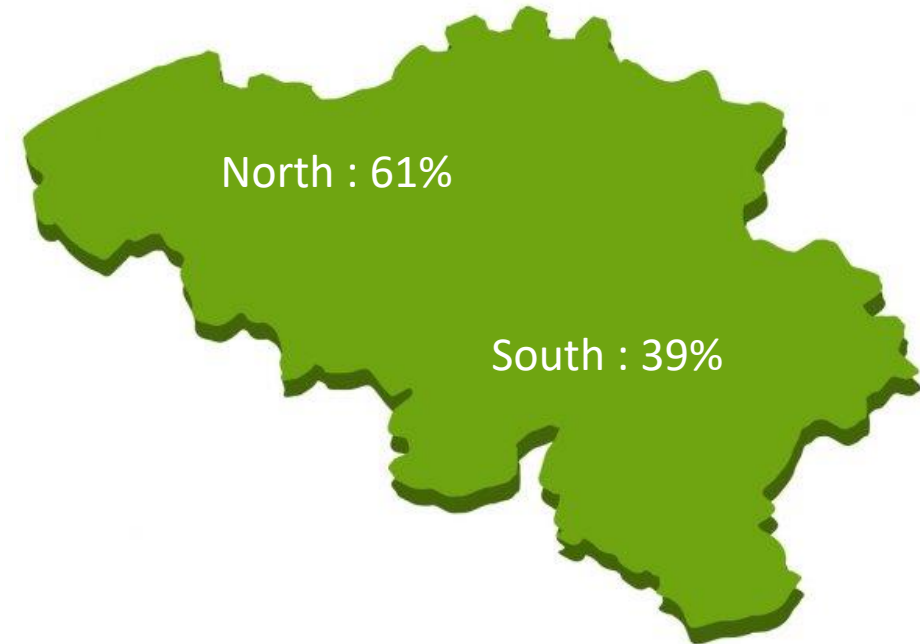
Advertisers (n= 460)

■ % online ■ % offline



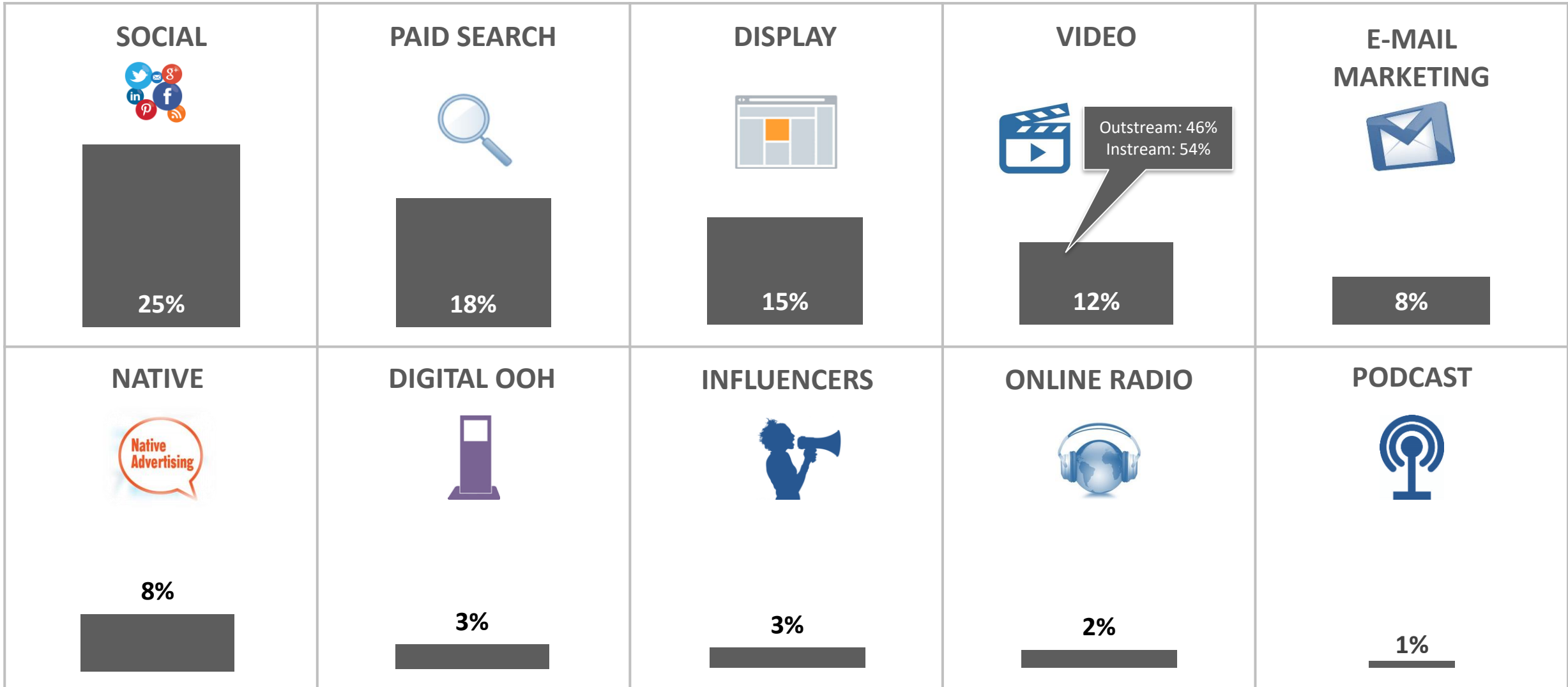
Digital budget by region %

Advertisers (n=460)



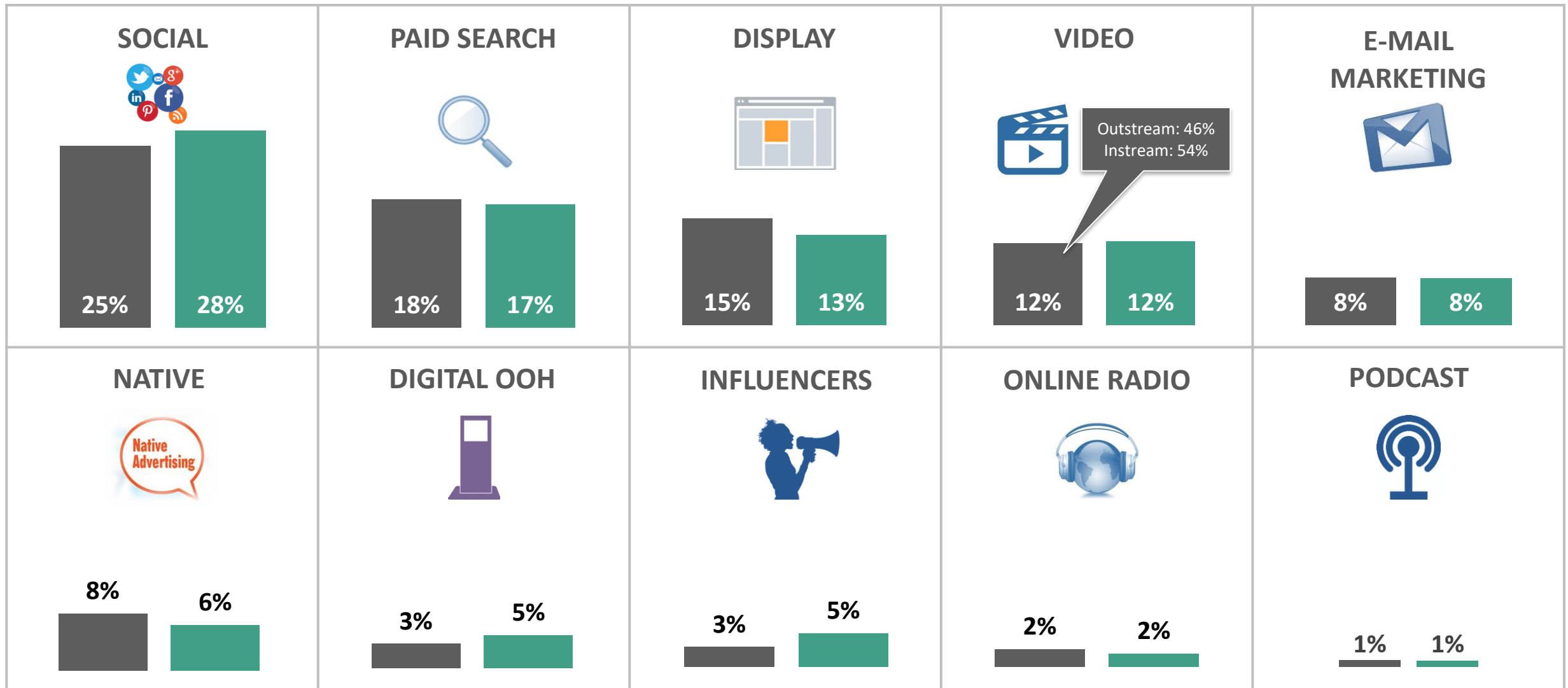
How is the budget you spend on digital channels divided into the following formats?

■ Advertisers (n=460)



How is the budget you spend on digital channels divided into the following formats?

■ Advertisers (n=460) ■ Agencies (n=188)



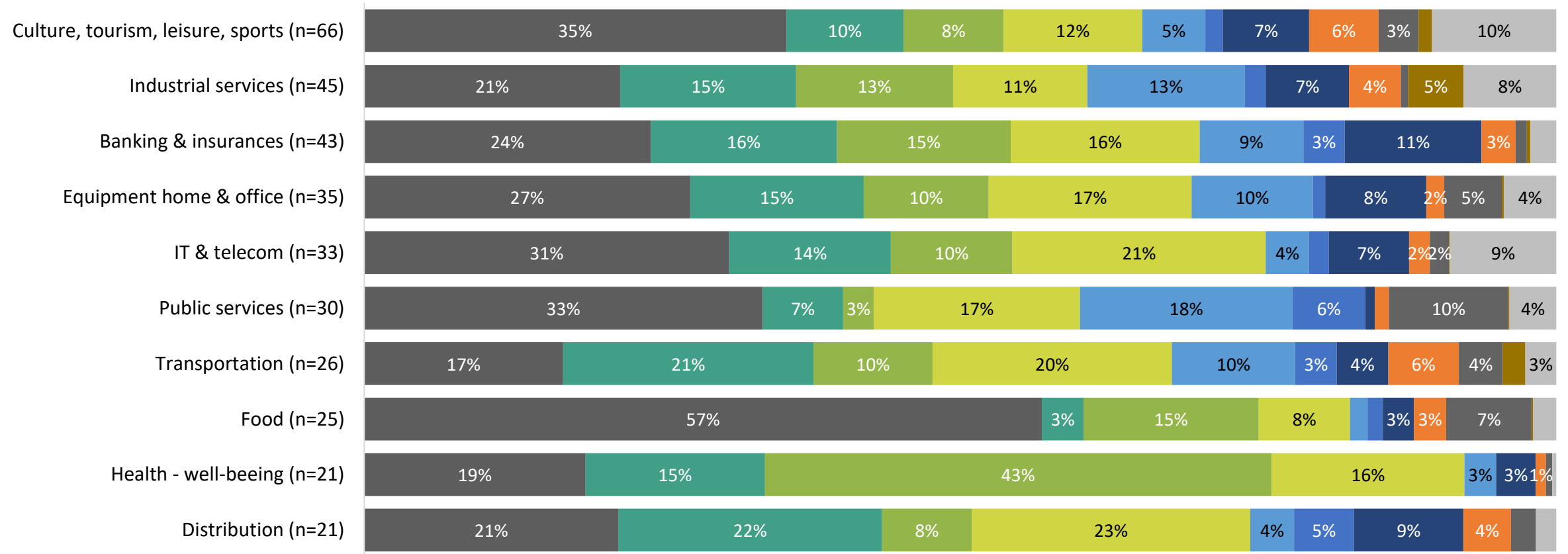
How is the budget you spend on digital channels divided into the following formats?

Digital Mediamix by sector

Advertisers

WARNING : Data shown for information only. Very low sample sizes!

■ Social ■ Display ■ Video ■ Paid Search (SEA) ■ Native ■ Online radio ■ Email marketing ■ Digital OOH ■ Influencers ■ Podcasts ■ Other



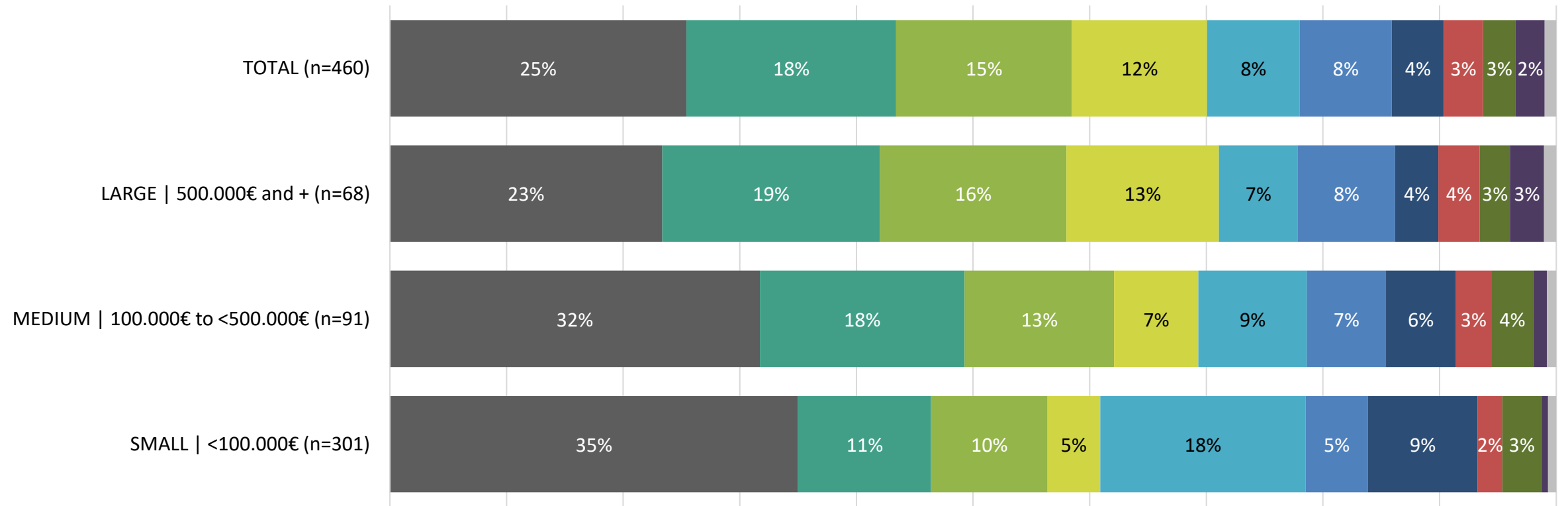
Social has the highest penetration among lowest budget category

How is the budget you spend on digital channels divided into the following formats? / % Budget spent.

Budget by channel according to digital budget

Advertisers

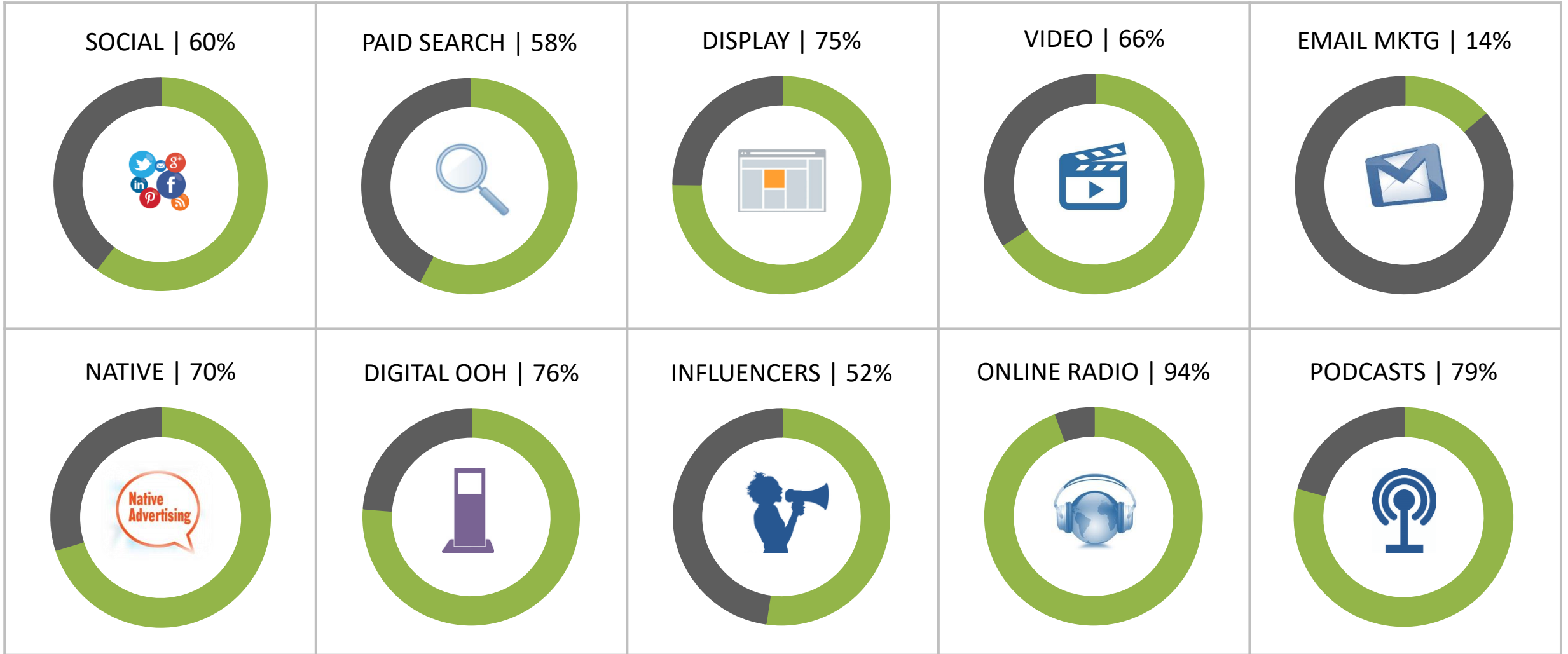
■ Social ■ Paid search (SEA) ■ Display ■ Video ■ Email marketing ■ Native ■ Influencers ■ Digital OOH ■ Podcasts ■ Online radio ■ Other



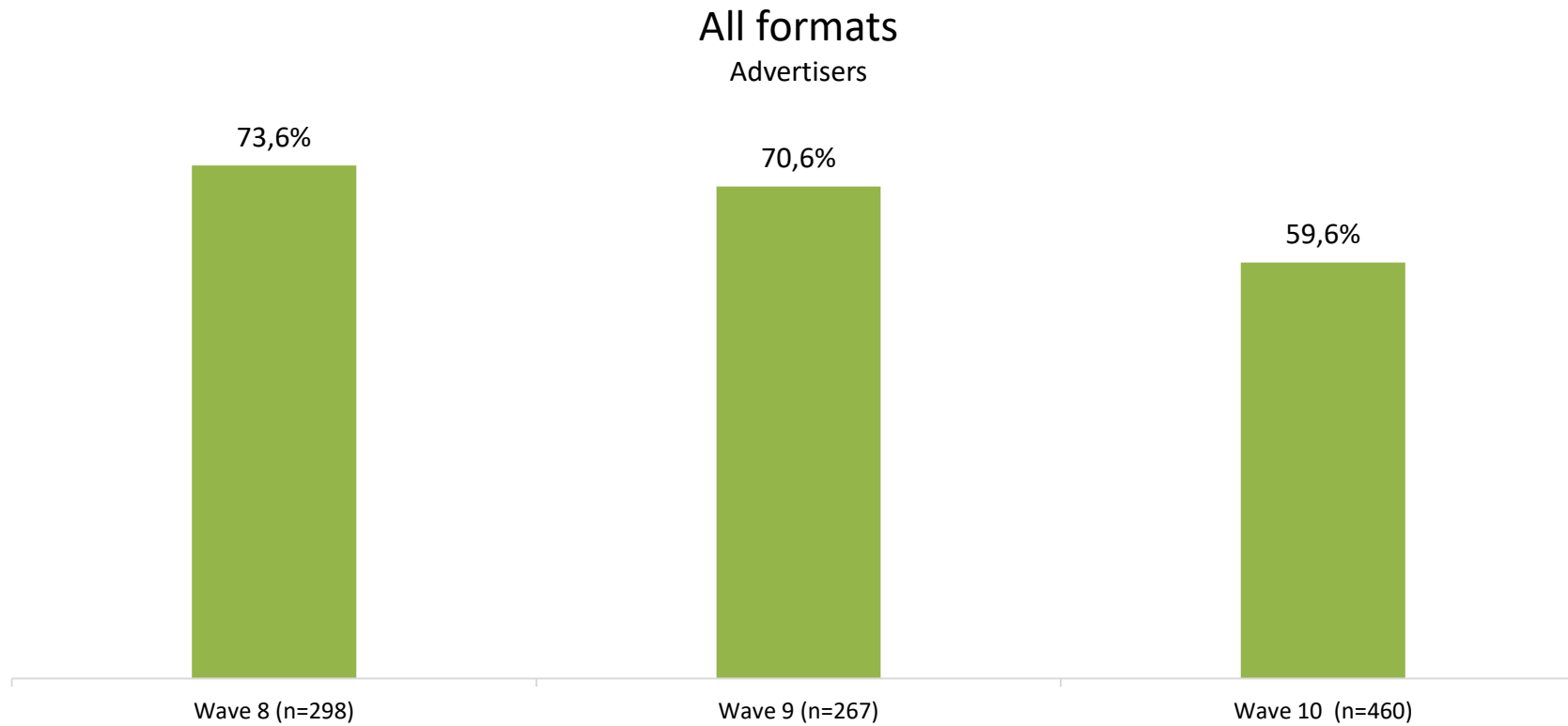
59,6% of digital ad spend is bought **via agency**

For each of the products and services you use in your digital communication (digital touchpoints), which part of the budget is purchased via an agency?

■ Via agency ■ Direct



For each of the products and services you use in your digital communication (digital touchpoints), which part of the budget is purchased via an agency?



Estimation of the **total NET digital ad spend** ?

We have ingredients...

- 1.177 M €**
UMA Billing 2019
(UMA Ranking Agencies)
- 24,8%**
UMA's share of digital
(UMA survey)
- 41,1%**
Share of digital
(Matrix 2020)
- 59,6%**
Via agencies
(Matrix 2020)

So, let's cook !

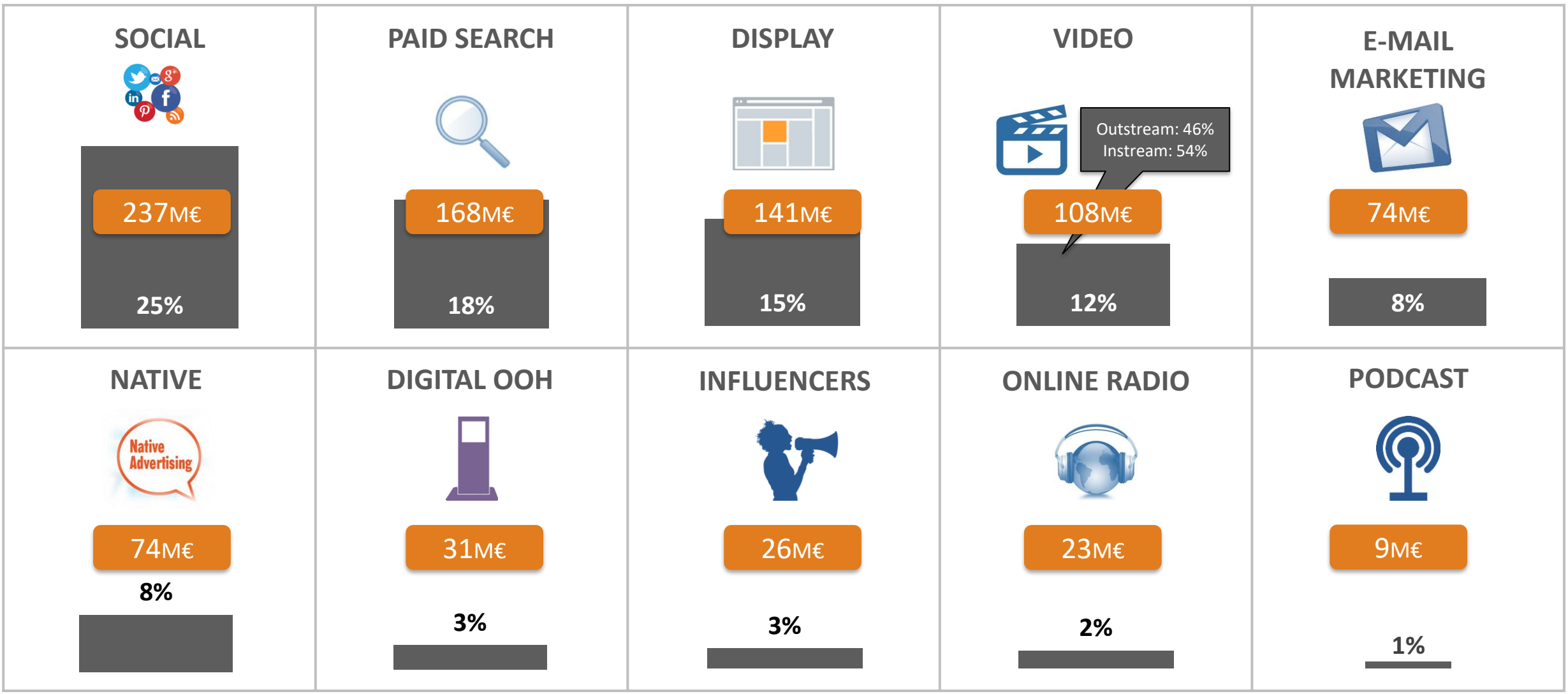
$$\underbrace{1.177 \text{ M€} \times 0,248}_{= 291,9\text{M Net digital UMA}} \times \underbrace{\left[\frac{0,411}{0,248} \right]}_{= \text{Adding non-UMA agencies' share}} \div \underbrace{0,596}_{= \text{Adding direct}} = \underbrace{811,6 \text{ M€} + \text{long tail estimate (15\%)}}_{\text{Total Net digital Ad spend 2019}}$$

= 933,4 M€

Digital budget by channel (estimation)

How is the budget you spend on digital channels divided into the following formats?

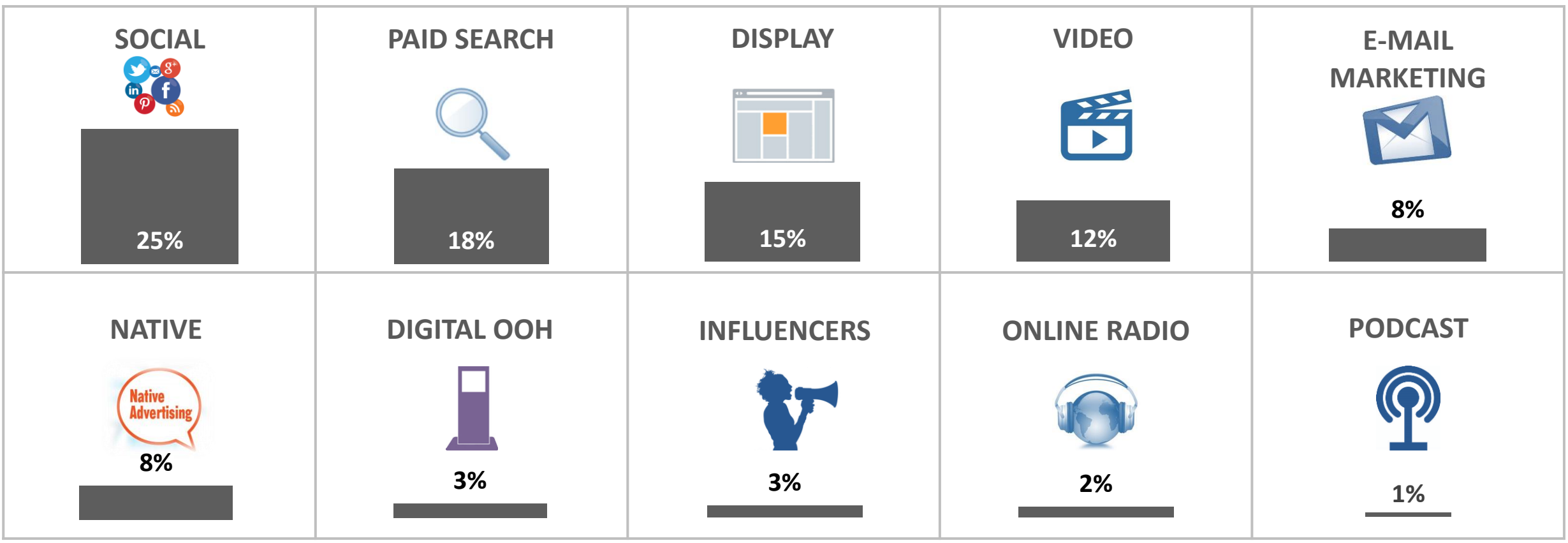
■ Advertisers (n=460)



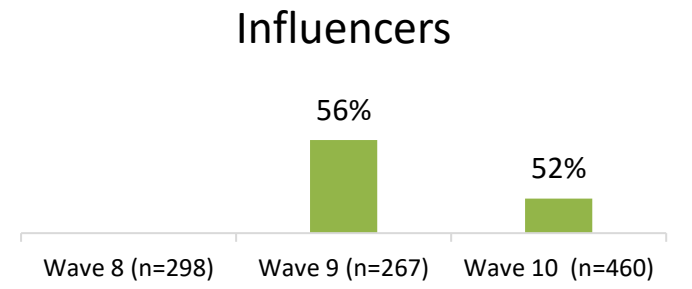
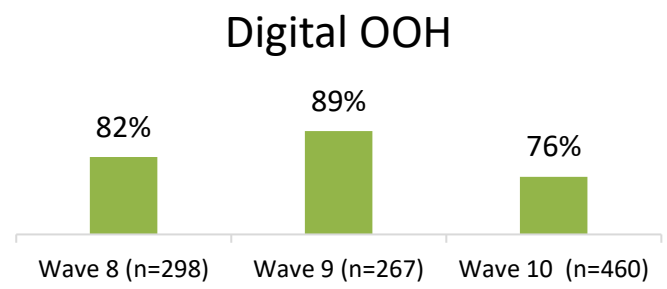
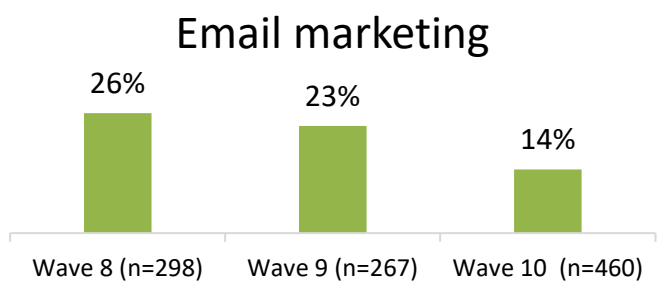
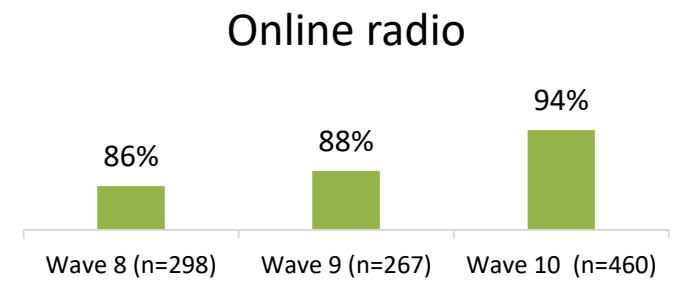
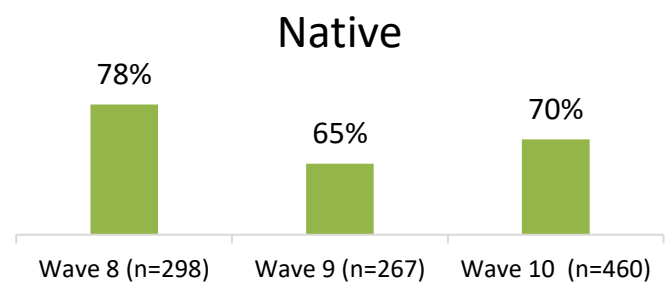
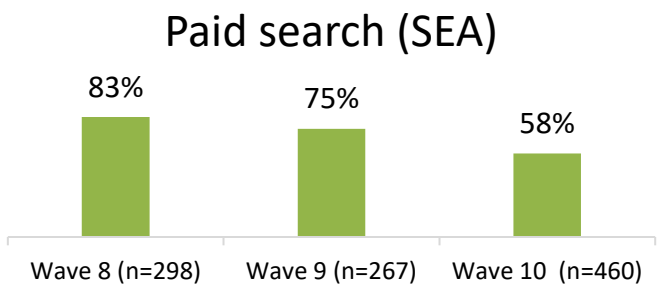
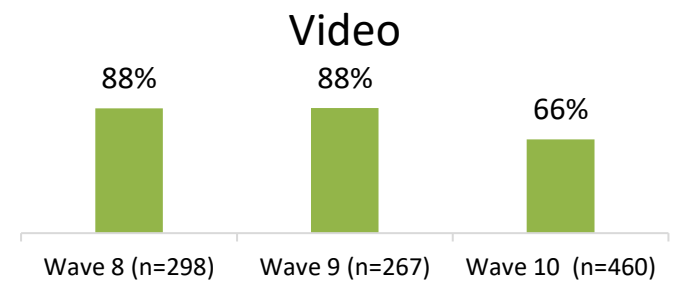
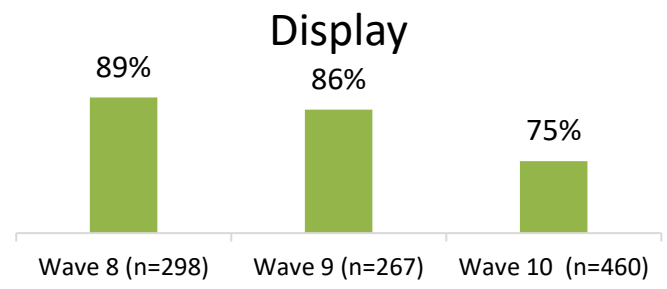
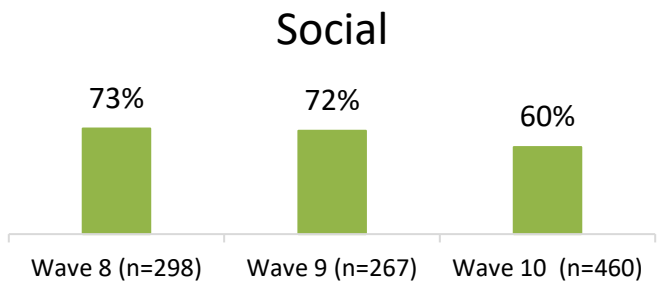
Digital budget by channel (estimation)

How is the budget you spend on digital channels divided into the following formats?

■ Advertisers (n=460)



For each of the products and services you use in your digital communication (digital touchpoints), which part of the budget is purchased via an agency?

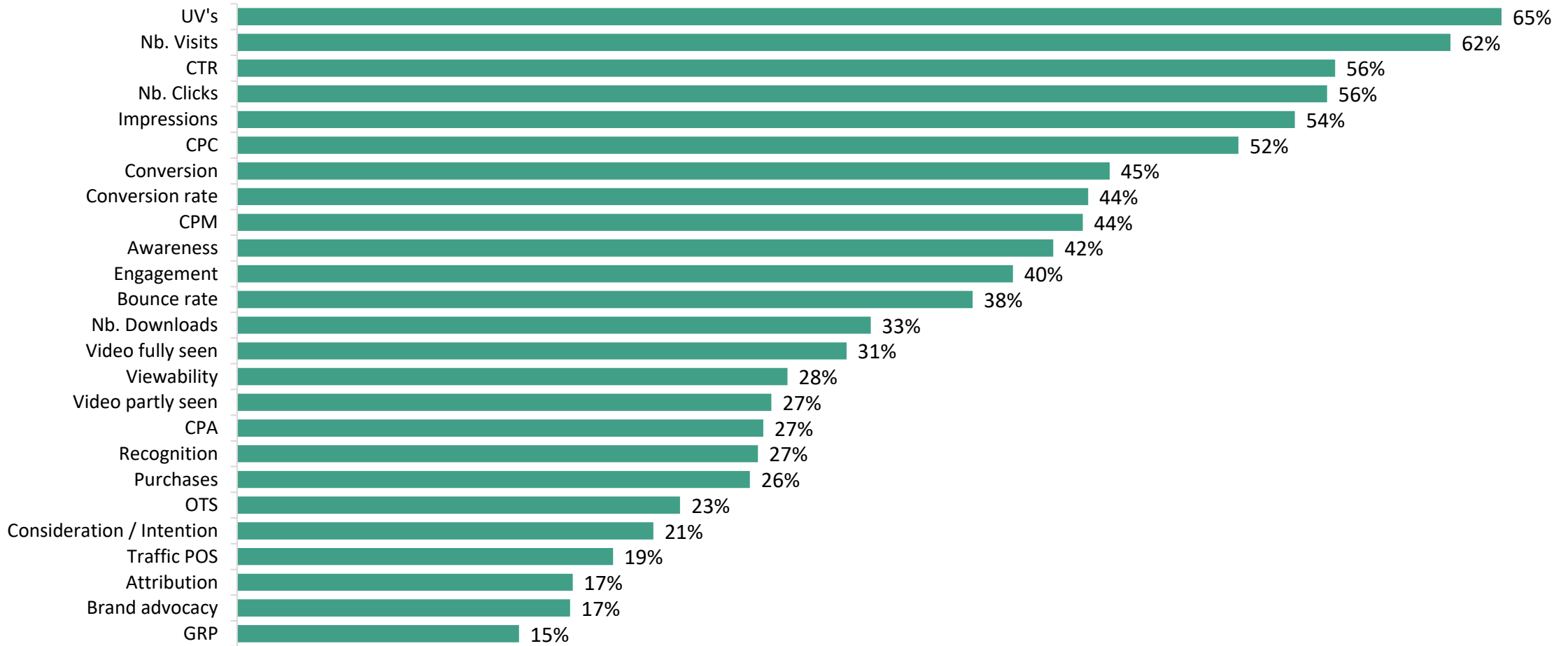


5 / Measured KPI's

How do you evaluate the performance of your digital communication actions? What are the Key Performance Indicators (KPI's) that you measure?

Measured KPI's

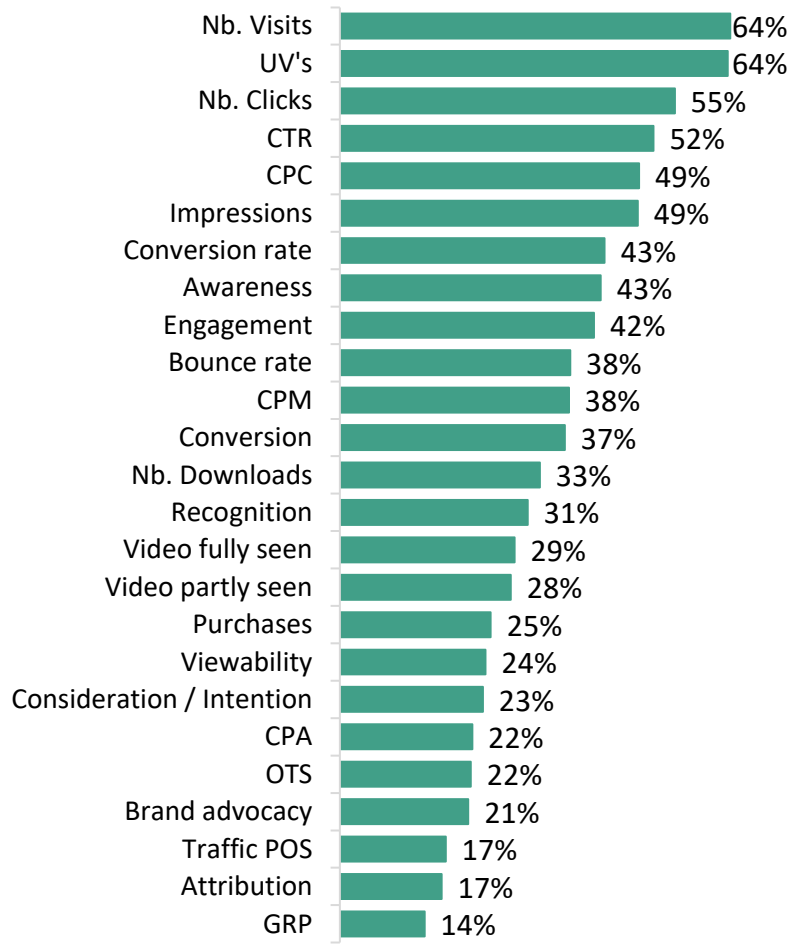
Base : Total (n=724)



How do you evaluate the performance of your digital communication actions? What are the Key Performance Indicators (KPI's) that you measure?

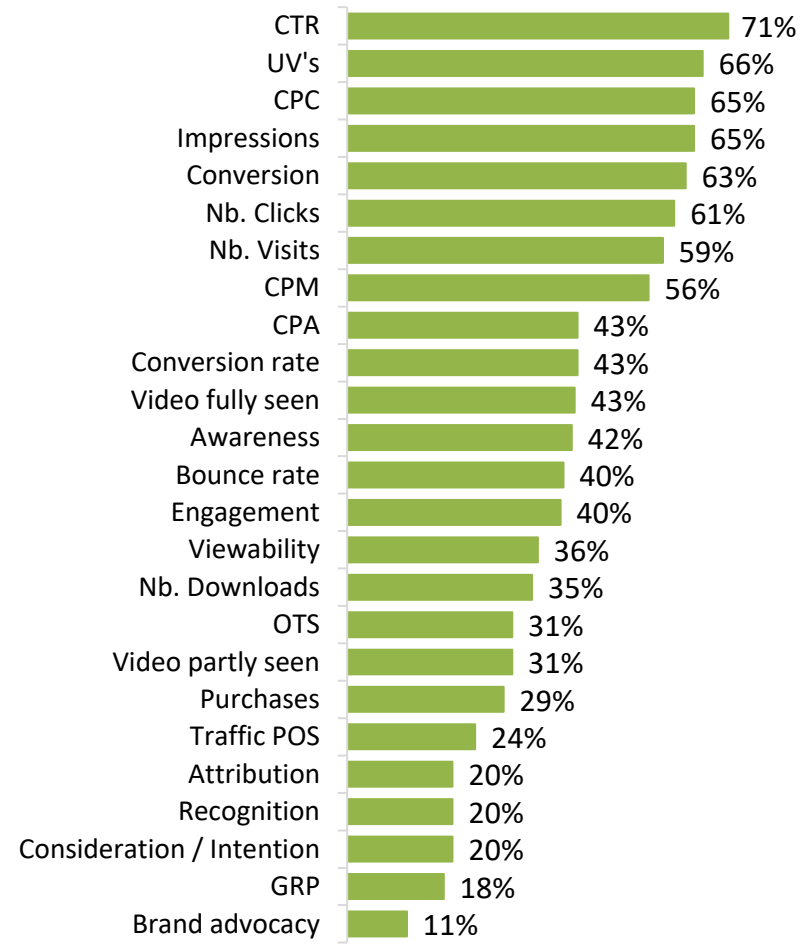
Measured KPI's | Advertisers

Base : Advertisers (n=460)



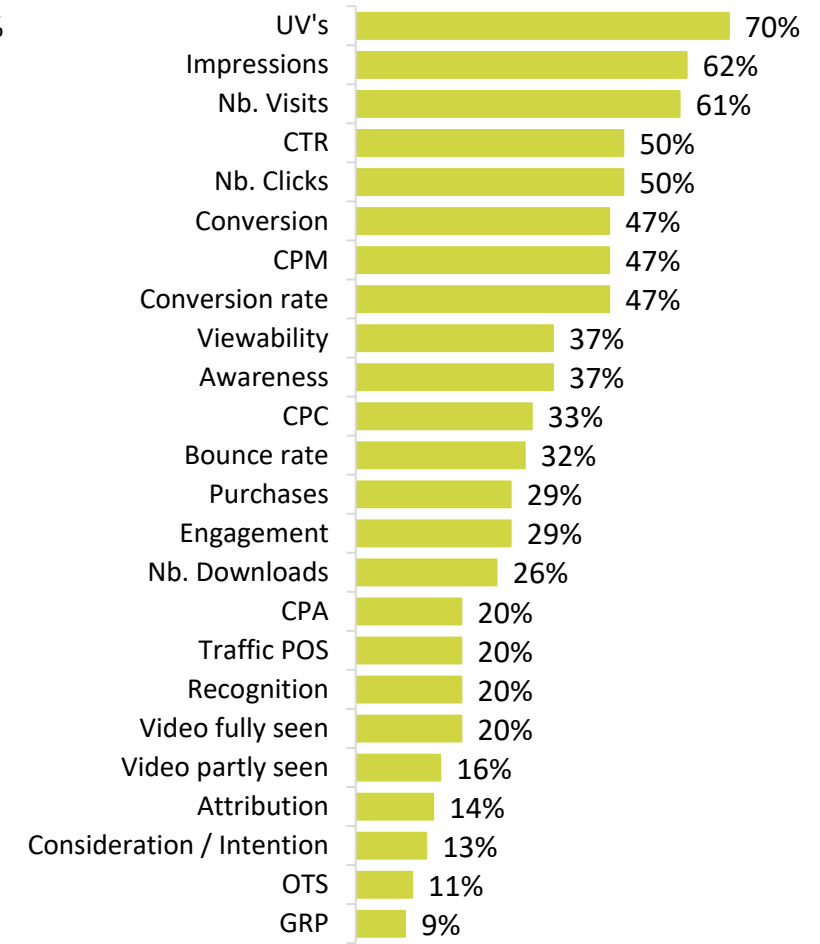
Measured KPI's | Agencies

Base : Agencies (n=188)



Measured KPI's | Media

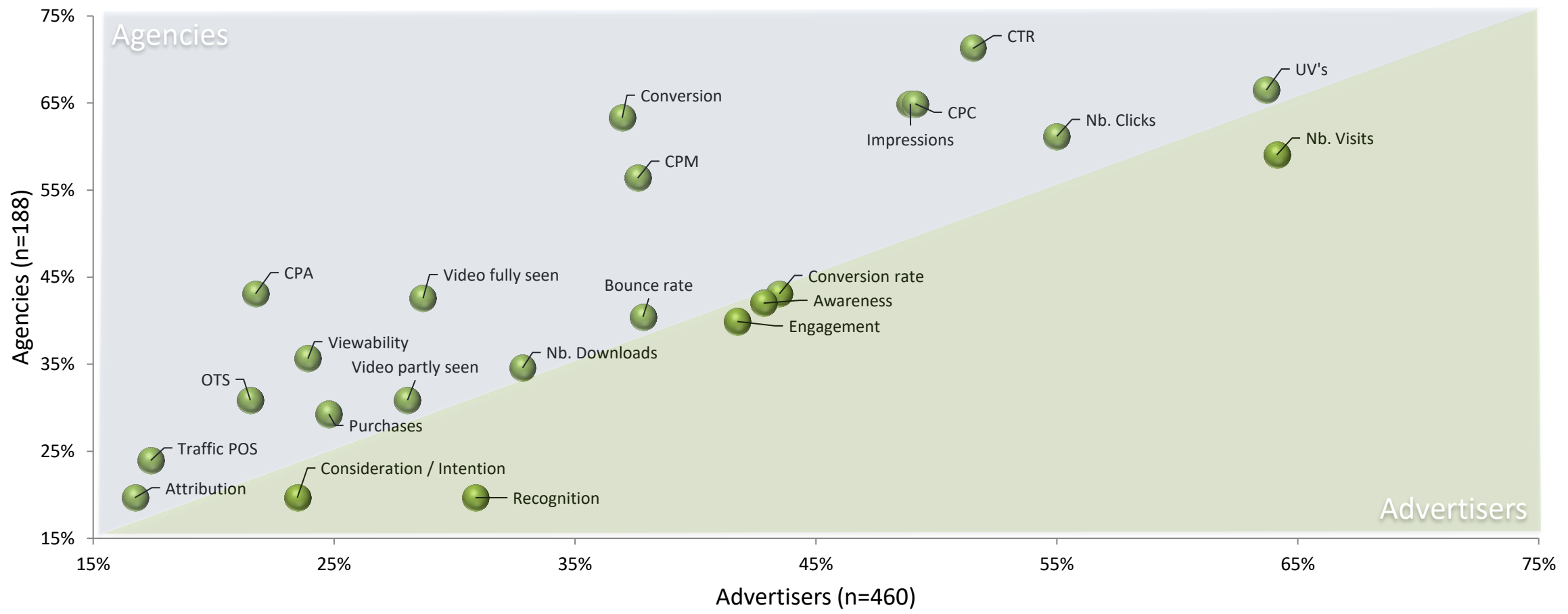
Base : Media (n=76)



Traditional KPI's are still most used

How do you evaluate the performance of your digital communication actions? What are the Key Performance Indicators (KPI's) that you measure?

Measured KPI's
According to Advertisers & agencies



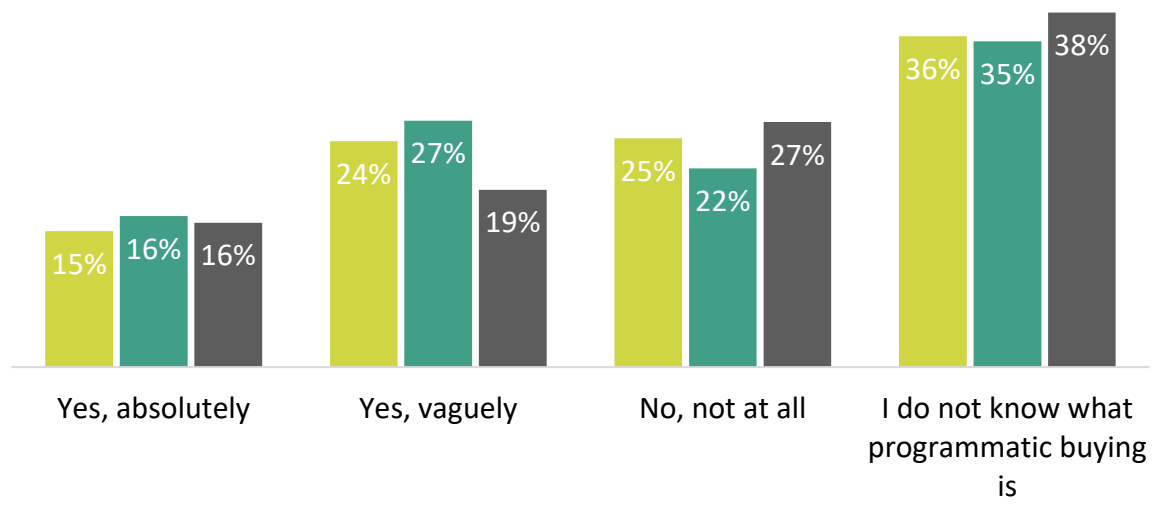
6 / Programmatic buying

*Do you know how much of the money you spend on your campaigns is spent on programmatic buying?
Take into account all formats: display, video, social, search, ...*

Advertisers

Involved in budget decision

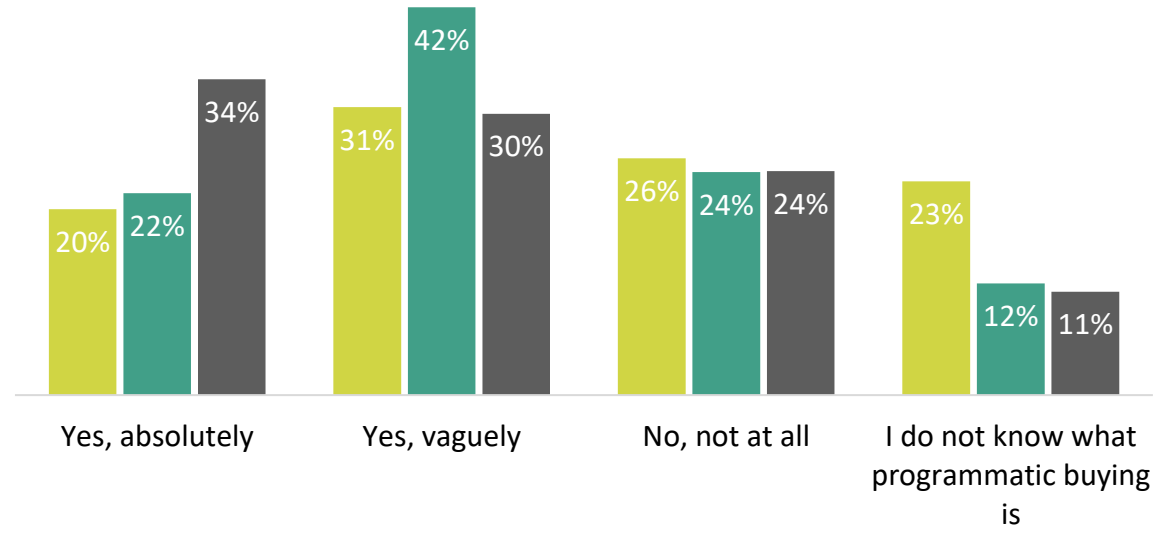
■ Wave 8 (n=275) ■ Wave 9 (n=267) ■ Wave 10 (n=421)



Agencies

Involved in budget decision

■ Wave 8 (n=166) ■ Wave 9 (n=174) ■ Wave 10 (n=188)

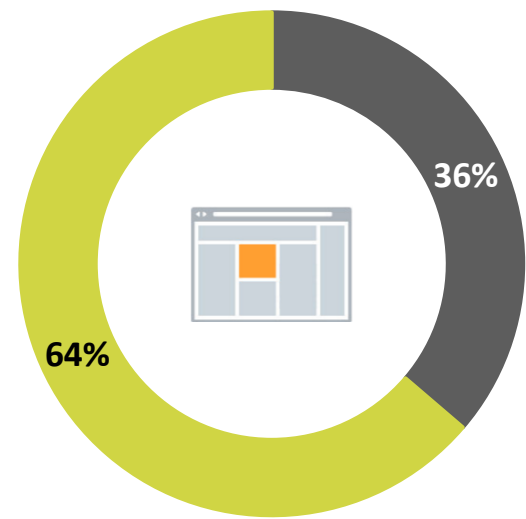


What was the share of programmatic purchases compared to all the budgets you invested in digital channels in 2018?

Share of programmatic | Display advertising

Advertisers & Agencies knowing about programmatic & invested in display (n=189)

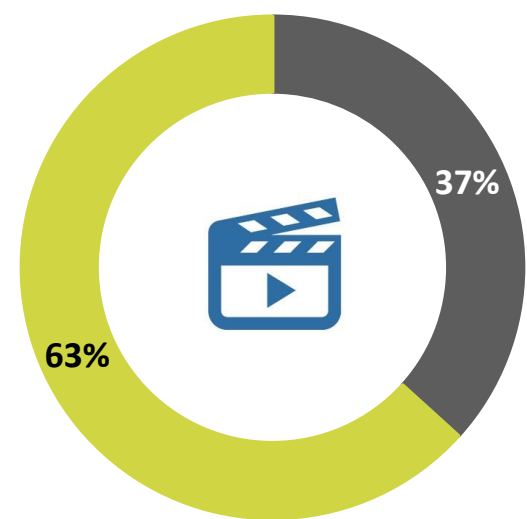
■ Programmatic ■ Non-programmatic



Share of programmatic | Video advertising

Advertisers & Agencies knowing about programmatic & invested in video (n=151)

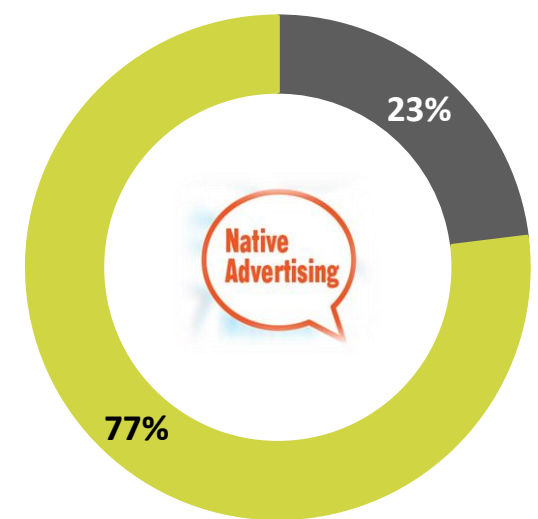
■ Programmatic ■ Non-programmatic













Share of programmatic | Native advertising

Advertisers & Agencies knowing about programmatic & invested in native (n=144)

■ Programmatic ■ Non-programmatic



56% of digital budget is spent programmatically

	Share of Digital mix		Share of Programmatic
 SOCIAL	25%	x	100%
 PAID SEARCH (SEA)	18%	x	100%
 DISPLAY	15%	x	42%
 VIDEO	12%	x	37%
 EMAIL MKTG	8%	x	0% <i>(best guess)</i>
 NATIVE	8%	x	24%
 DIGITAL OOH	3%	x	0% <i>(best guess)</i>
 ONLINE AUDIO	2%	x	33% <i>(best guess)</i>
 INFLUENCERS	3%	x	0% <i>(best guess)</i>
 PODCASTS	1%	x	0% <i>(best guess)</i>

56%

7 / Key take-aways

- Online share = 41,1% of the media mix.
- Estimate of total net ad spend of 933,4 million €.
- Social and Search remain as leading digital TP's with a share of digital of respectively 25% and 18%.
- Display is not dead and still bigger than video.
- Social and search also considered as the most effective touchpoints by advertisers, with low differentiation according to communication objectives...
- ...while agencies evaluate TP's effectiveness starting from the communication objectives.
- KPI's (still) remain web centric.
- Programmatic represents 56% of the digital media budget (incl. social & search), i.e. a market worth more than 0,5Billion € net ad spend.
- Different approaches according to sector :
 - Food advertisers use more social media, while the health & well-being sector is more video oriented.
 - Distribution and transportation still believe in display.
 - Public services use more Native than average.
 - Top SEA sectors are distribution, telco and transportation.

KEY TAKE-AWAYS /