

“B : A / M !

Presentation BAM MATRIX / 2019 !

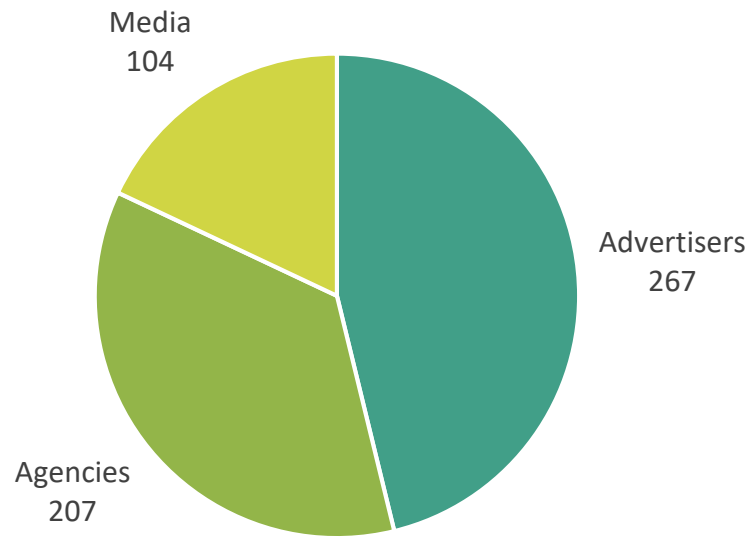
- Field : From 15/02/2019 to 05/03/2019
- Recruitment : @mail
- Sample : 578 interviews
- Profile : Advertisers, agencies and media/sales houses
- Data collection : Online questionnaire (CAWI)
- Field operator : Dynata (SSI)
- Analysis : BAM & Phimedia

• Partners :



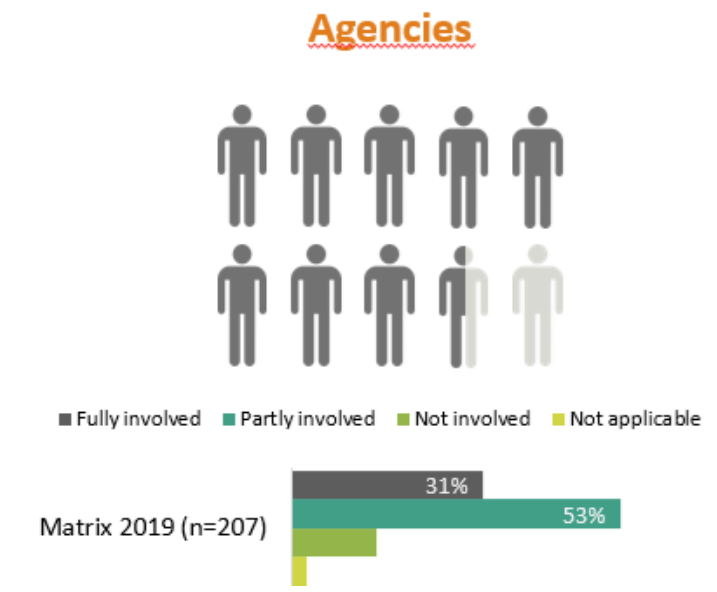
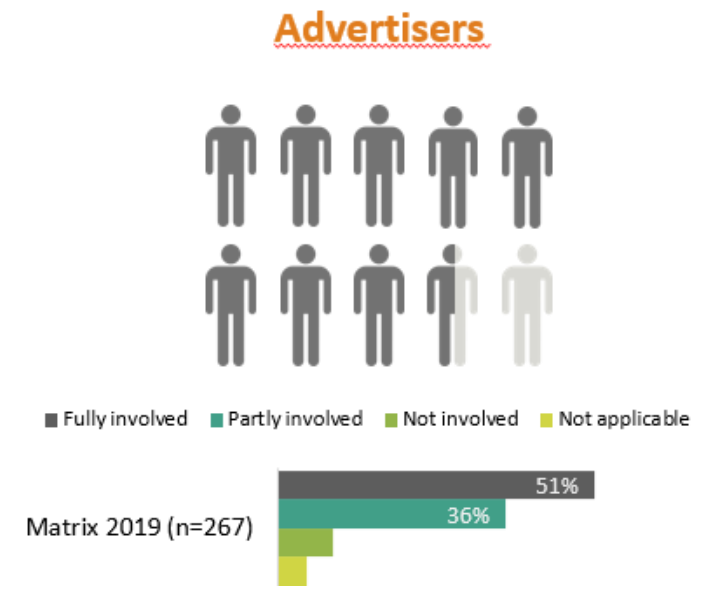
# METHODOLOGY /

Number of respondents



Involvement in budget decisions

*ADVERTISERS : 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?*



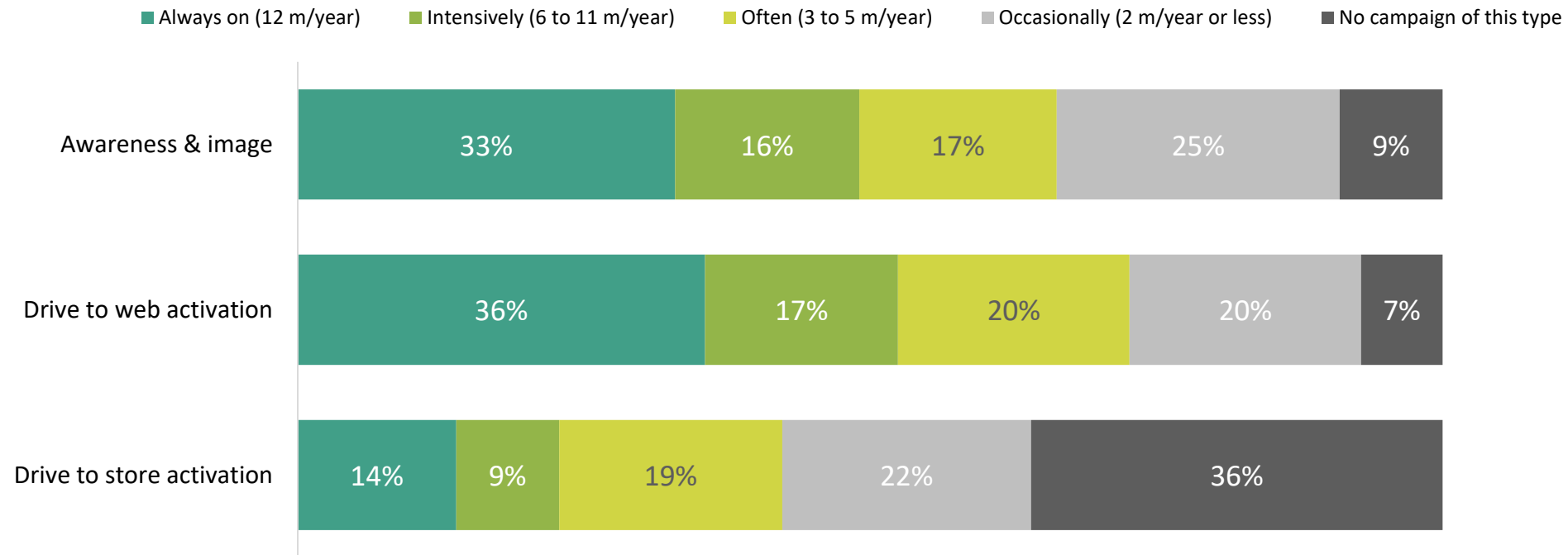
## 2 / Digital campaigns frequency

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

*In 2018, how often did you use digital channels for each of the following type of campaigns?*

## Frequency of use per type of campaign

Advertisers (n=267)

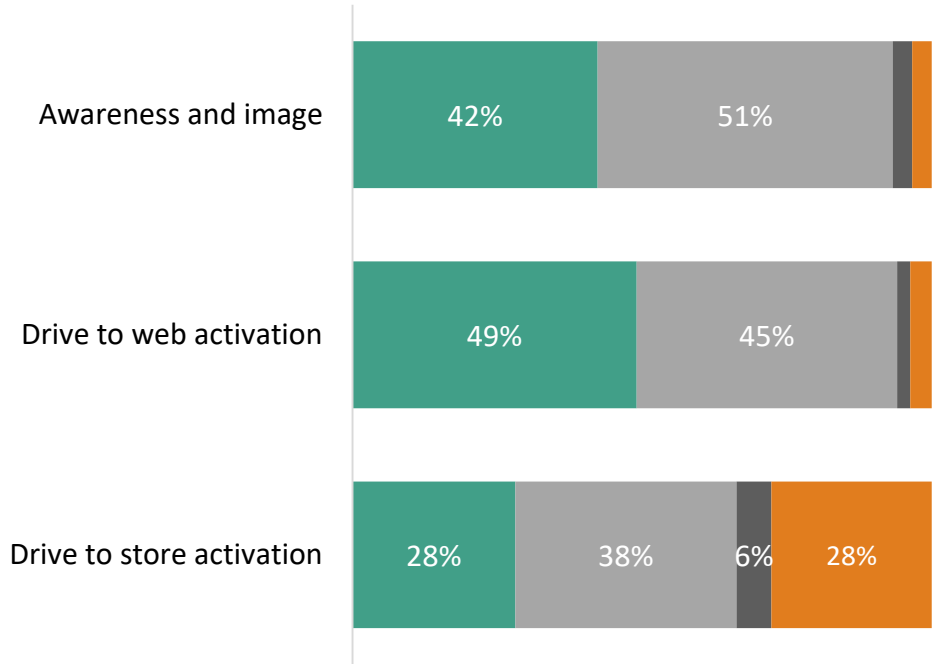


# Future use of **digital vs offline** channels

*How do you plan to use digital channels in 2019 compared to 2018 ...?  
And how do you plan to use the traditional media (TV, radio, press, cinema, billboard) in 2019 compared to 2018 ...?*

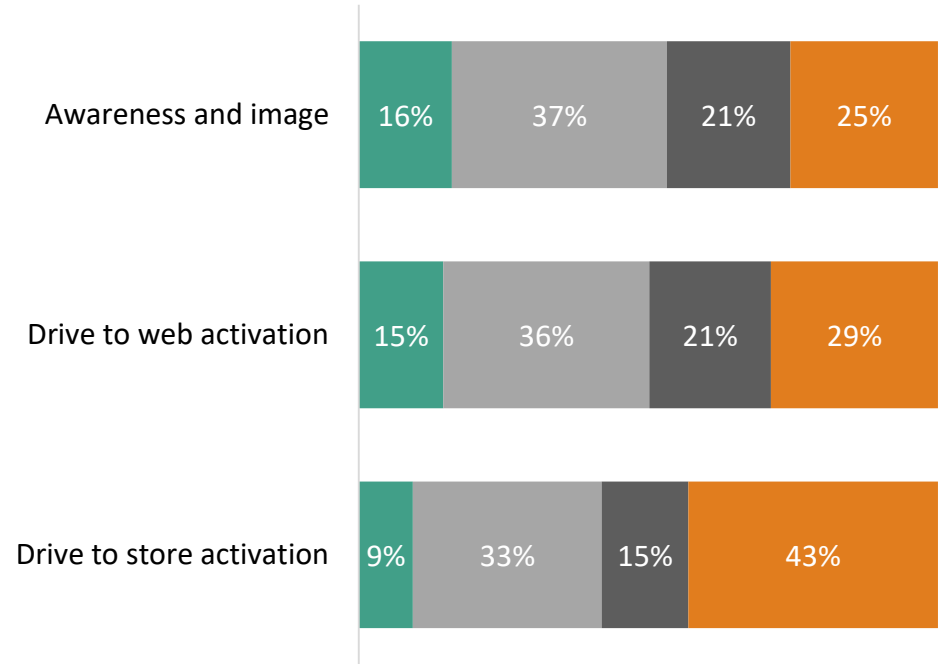
## Future use of digital channels Advertisers (n=267)

More frequently   At the same rate   Less frequently   No campaign of this type in 2019



## Future use of offline channels Advertisers (n=267)

More frequently   At the same rate   Less frequently   No campaign of this type in 2019



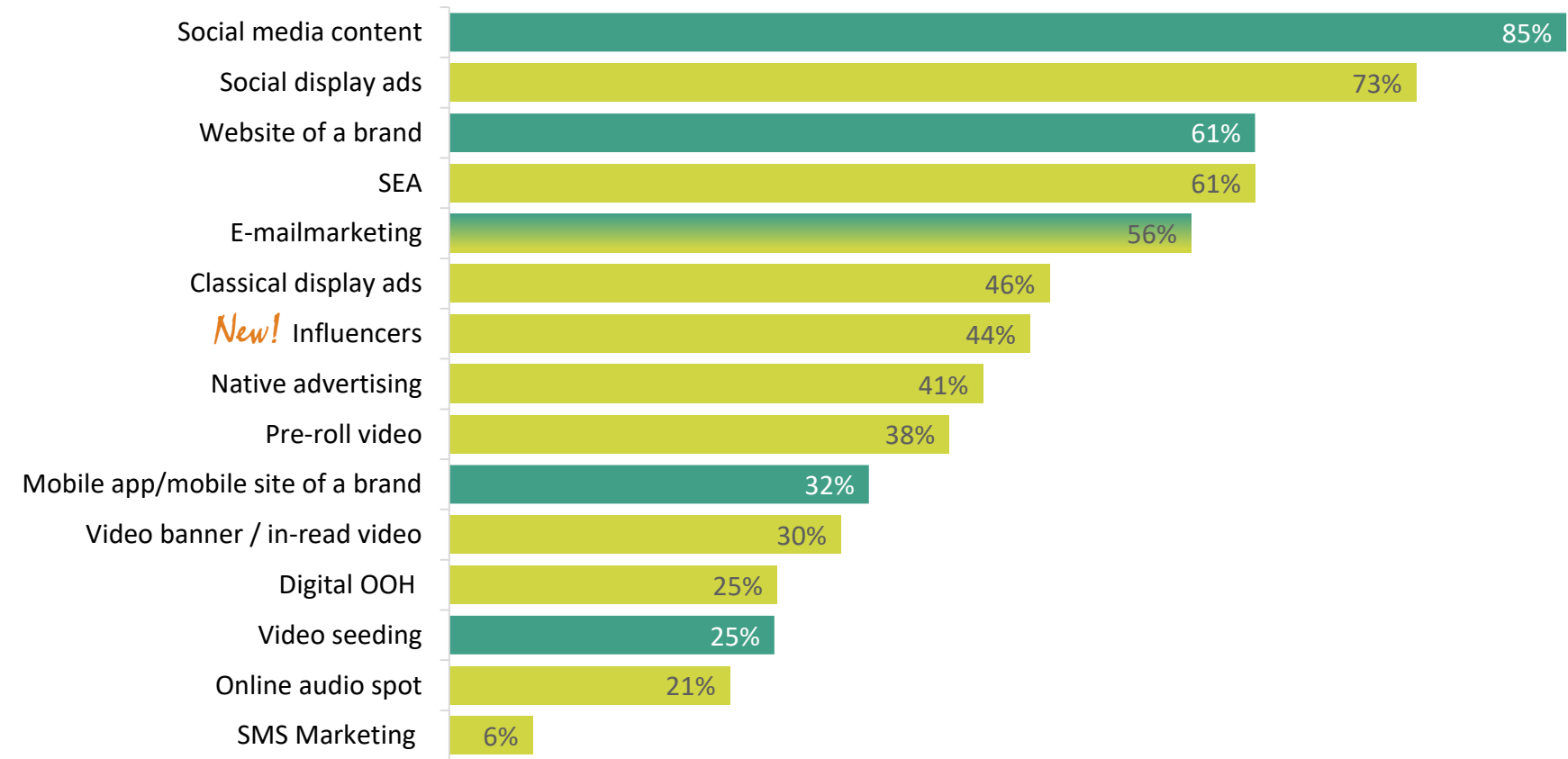
# 3 / Digital touchpoints use

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)



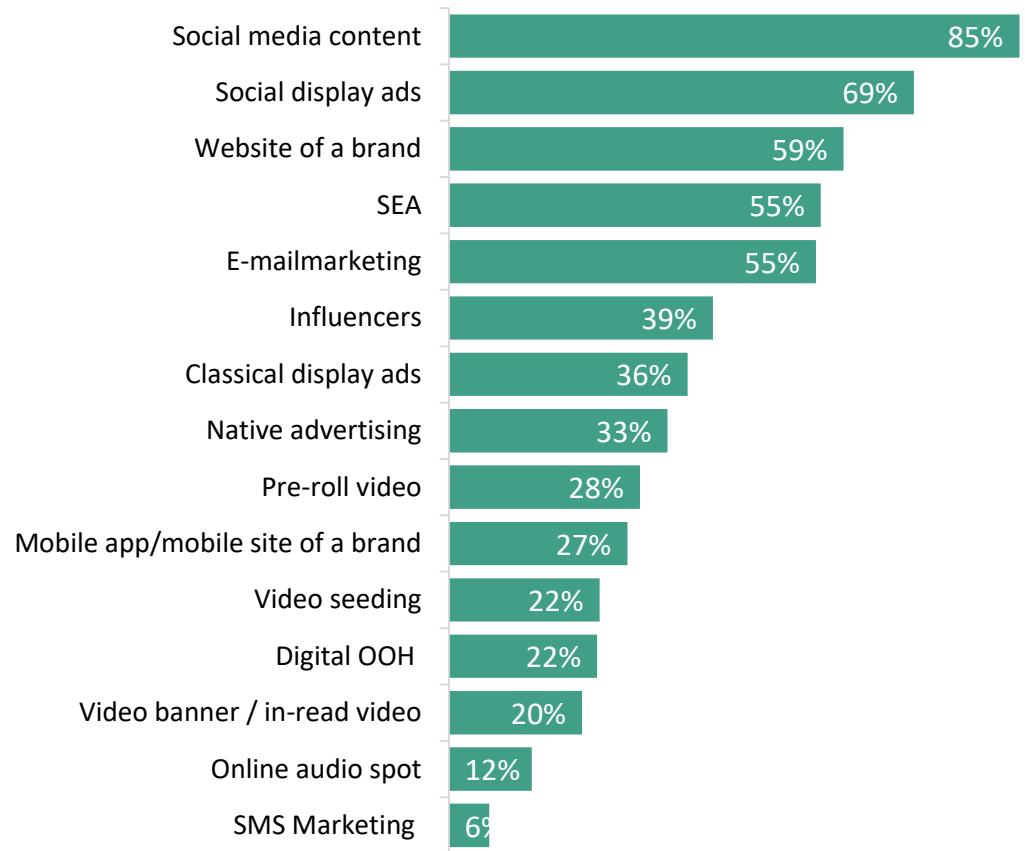


# 44% of the respondents use influencers in their digital mix

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

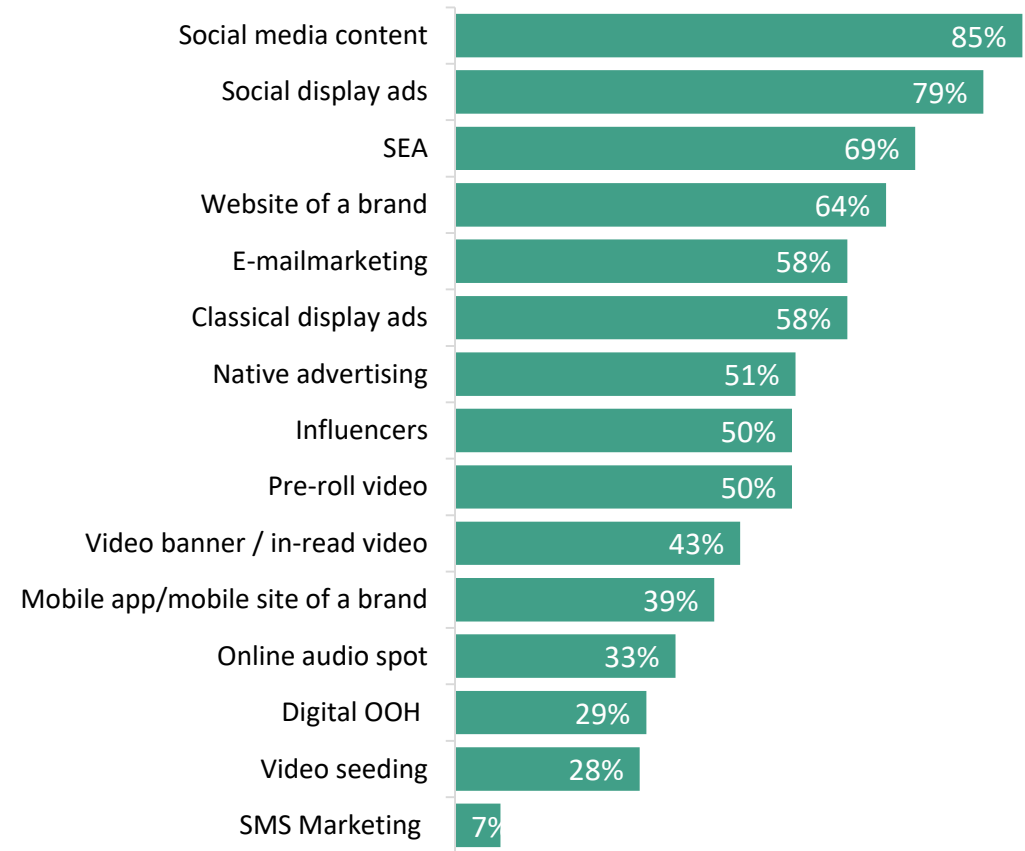
## Use among Advertisers

Base : Advertisers (n=267)



## Use among Agencies

Base : Agencies (n=207)



# 4 / Online Media Budget

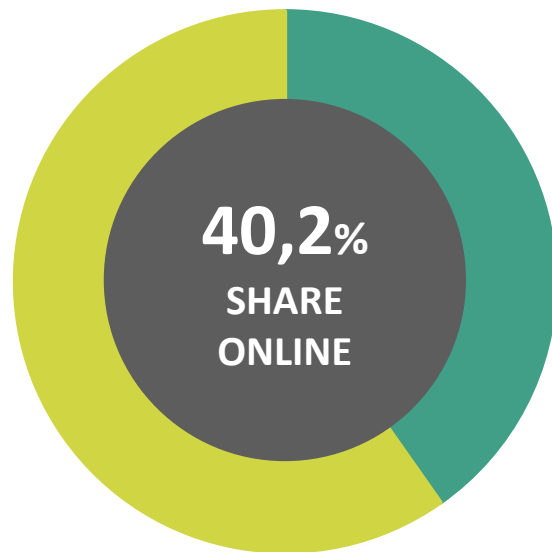
# 40,2% of the media mix went digital in 2018

What is the budget you spent on communication in 2018, both online & offline?  
 And what was, in 2018, the distribution of these investments between digital media (online) and traditional media (offline)?

## Share of digital (%)

Advertisers (n=267)

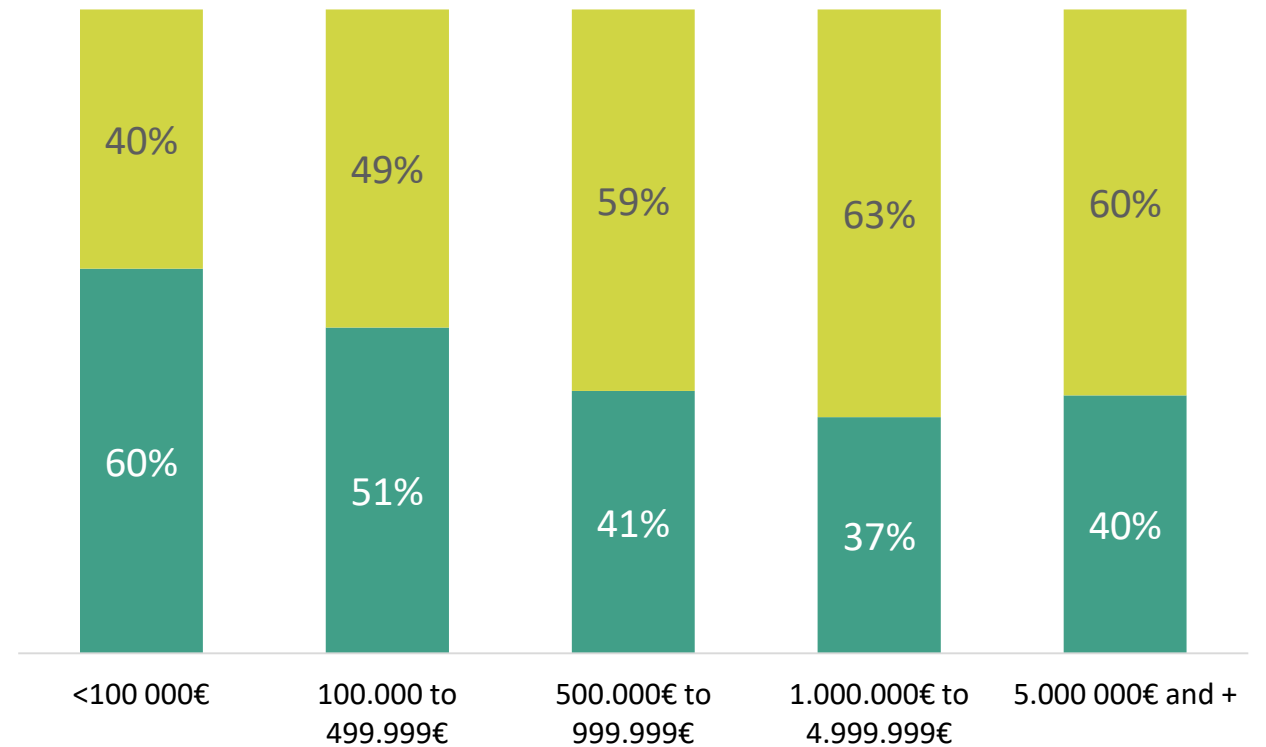
■ % online ■ % offline



## Share of digital per budget category

Advertisers (n=267)

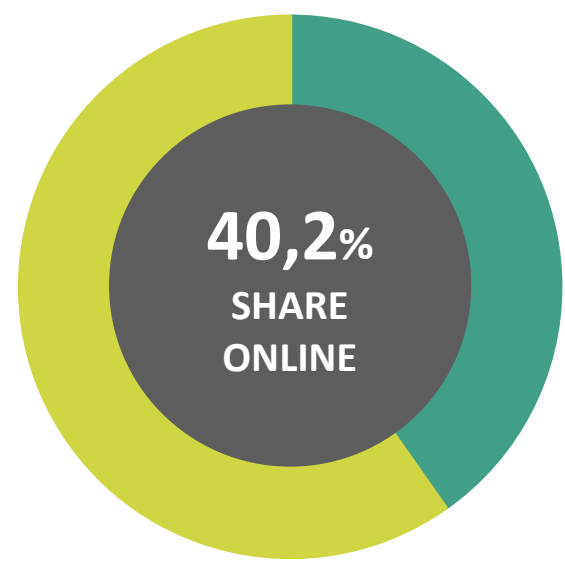
■ % online ■ % offline



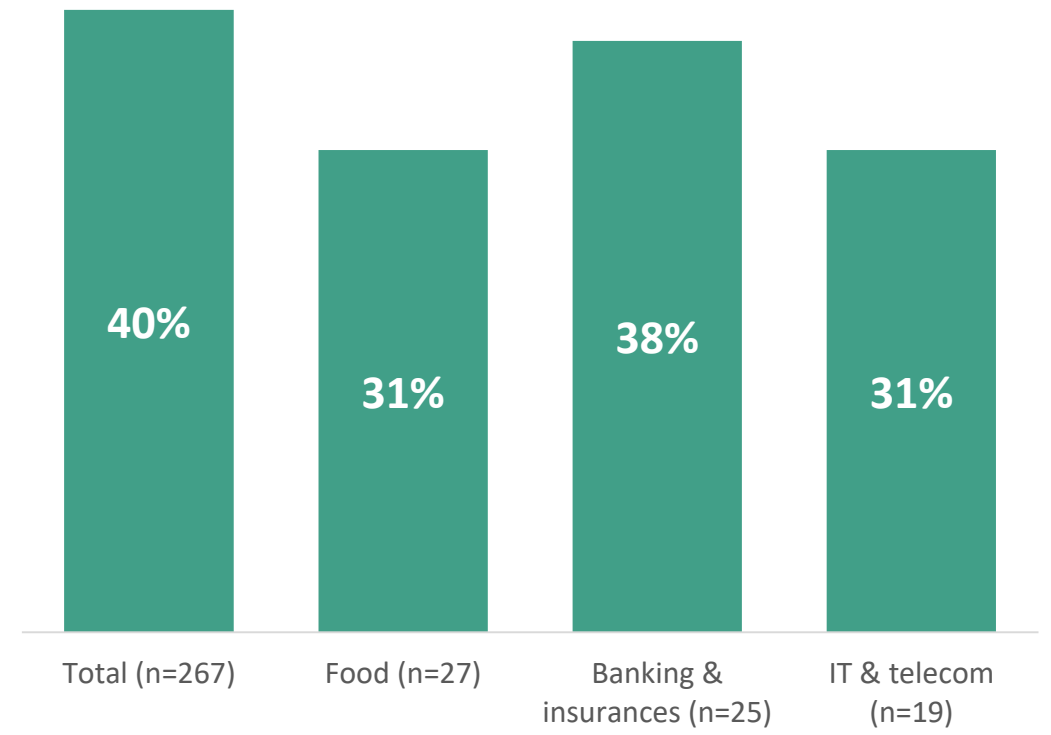
**Share of digital (%) in 2018**

Advertisers (n=267)

■ % online ■ % offline



**Share of digital (%) in 2018**

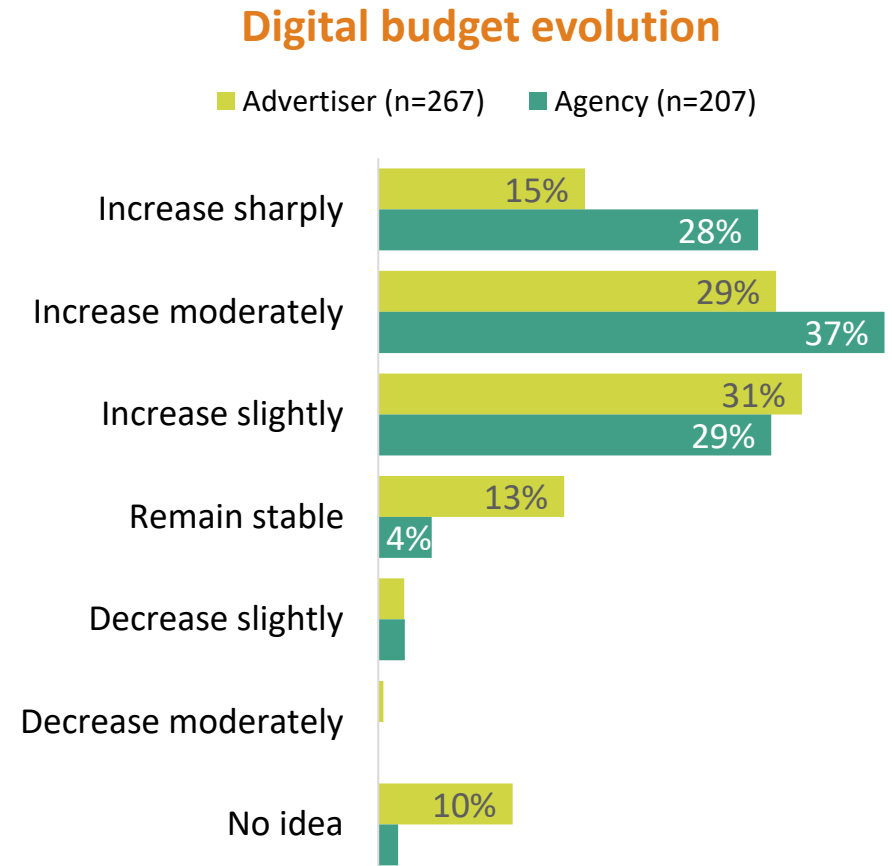
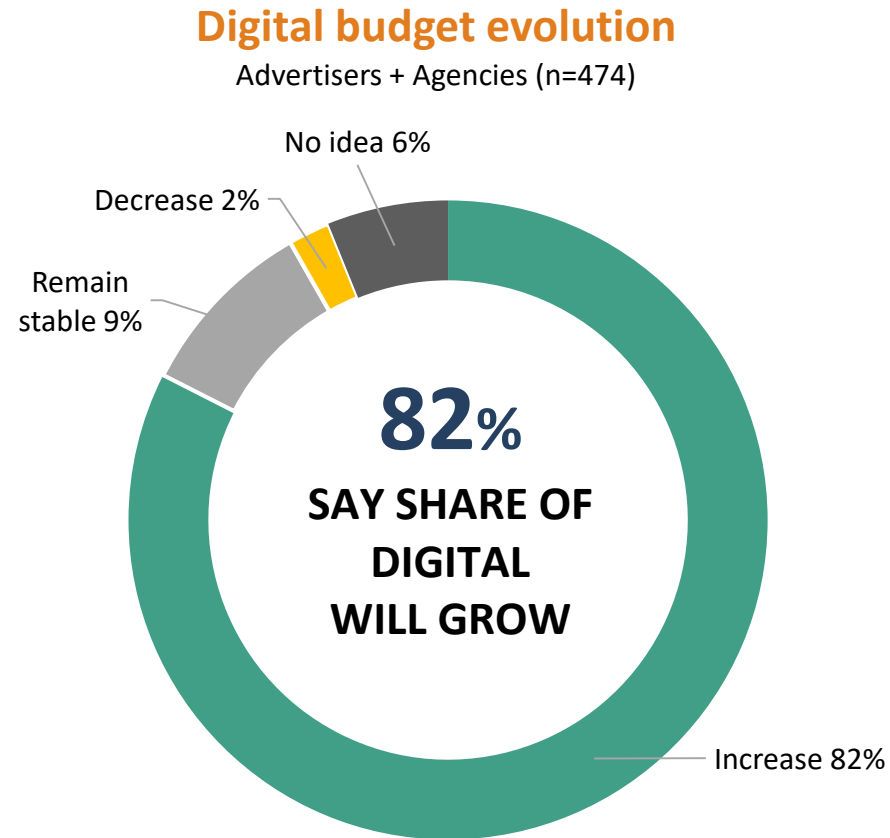


*What is the budget you spent on communication in 2018, both online & offline? And what was, in 2018, the distribution of these investments between digital media (online) and traditional media (offline)?*

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

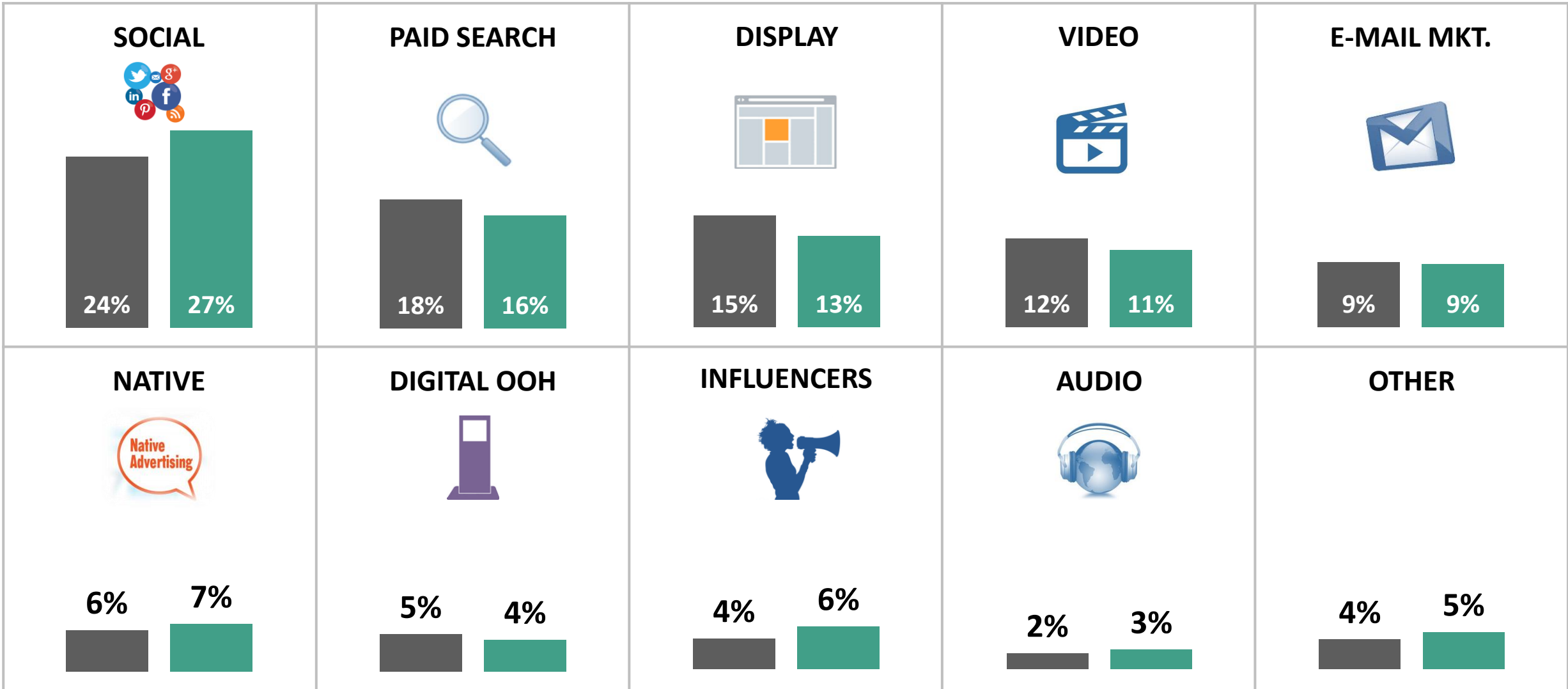
# Still, both advertisers & agencies have **high expectations** for the future of digital

More generally, how will the share of communication budgets dedicated to digital channels evolve in 2019 compared to 2018?



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

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



# Digital budget by channel – 3 main sectors

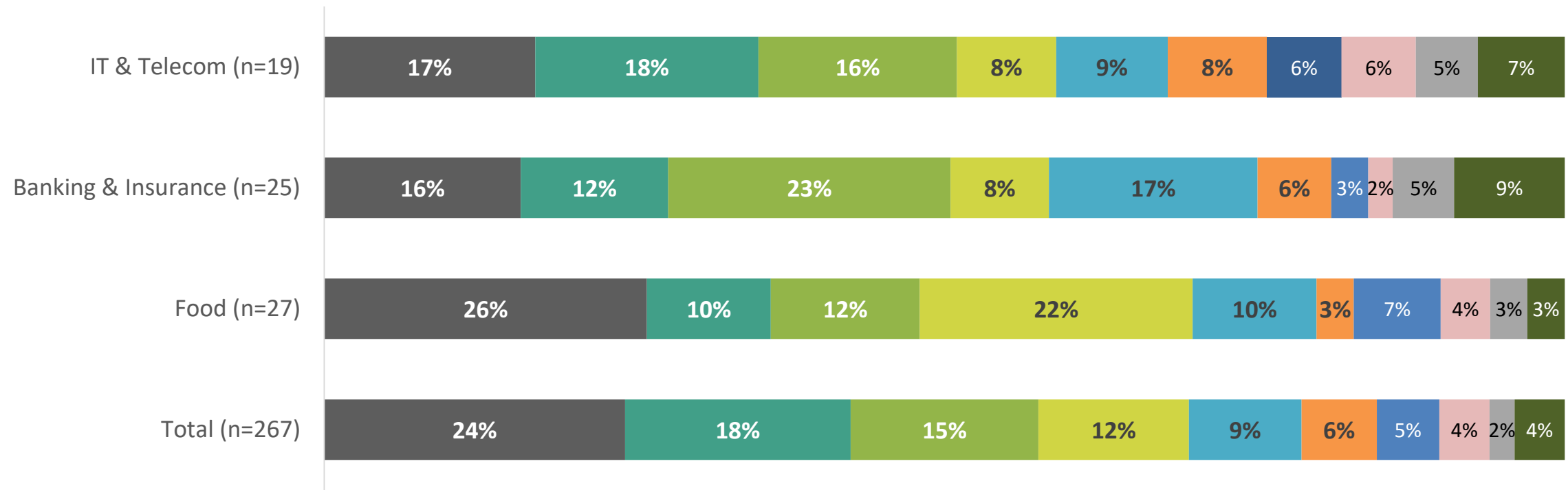
How is the budget you spend on digital channels divided into the following formats? / % Advertisers who use that format.

## Digital budget by channel : focus on 3 sectors

Advertisers

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

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



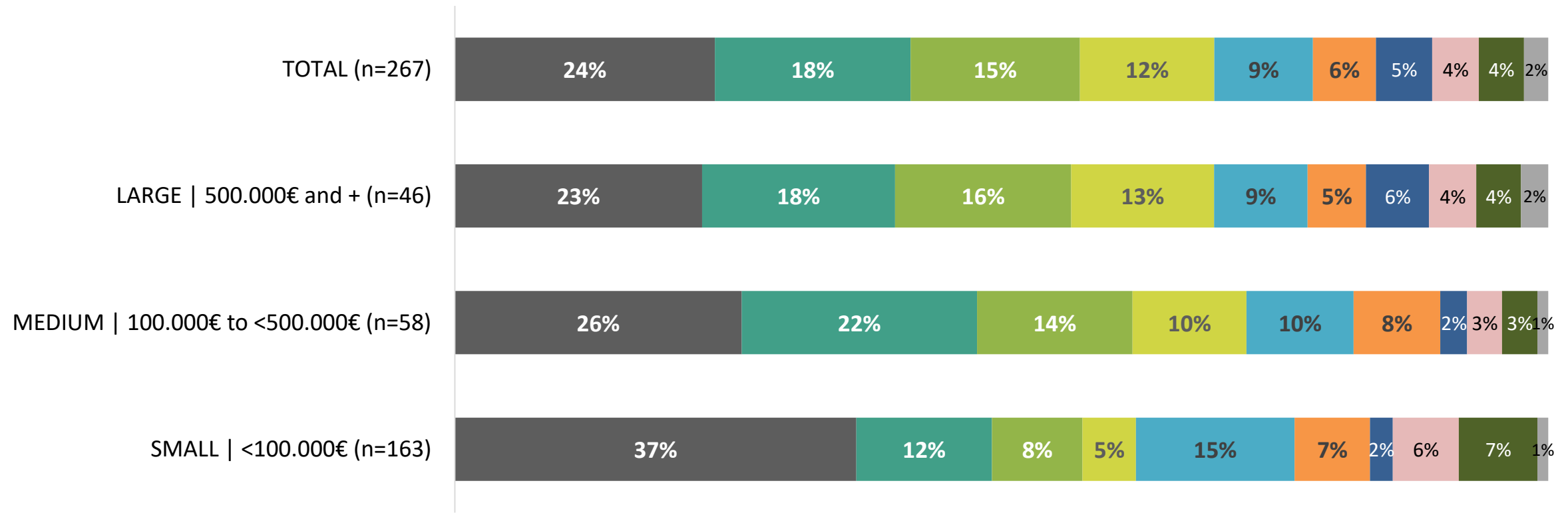
# Social has the highest penetration among lowest budget category

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

## Spent by channel according to digital budget category

Advertisers

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

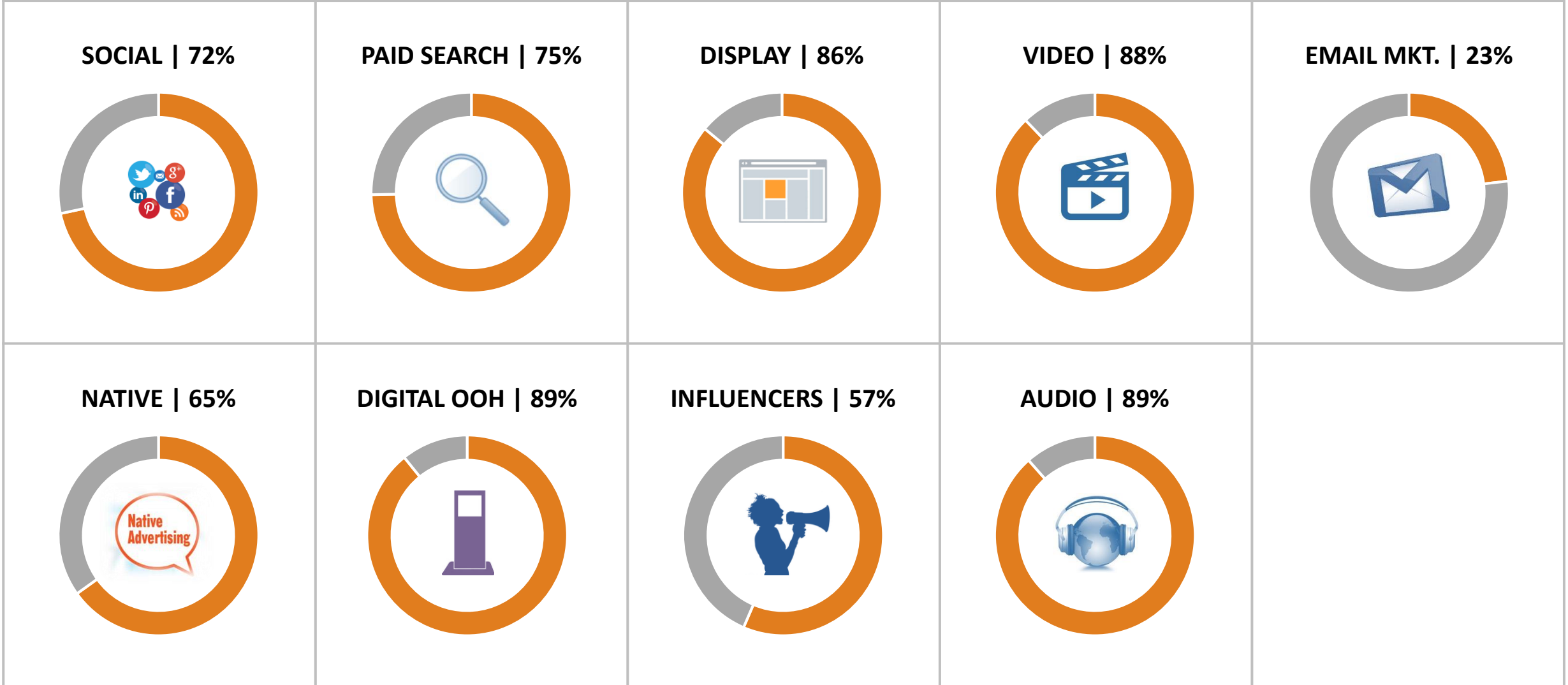




**71%** of digital adspend is bought **via agency**

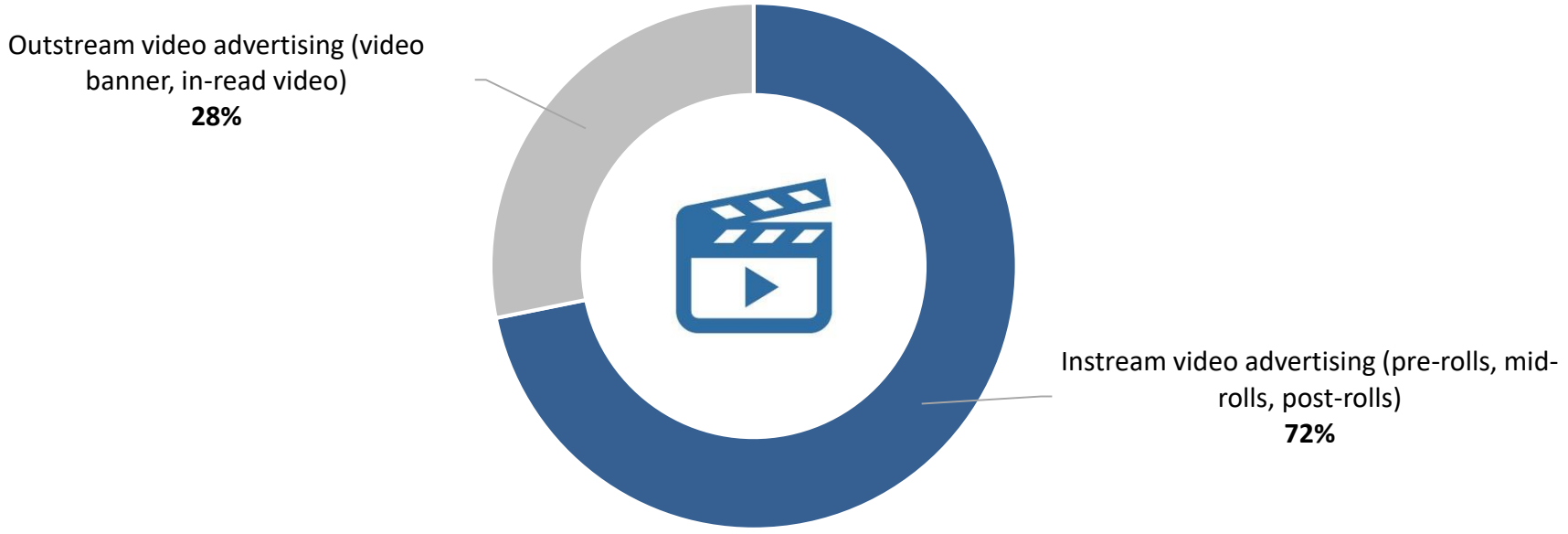
■ Via agency ■ Direct

*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?*



*And how are your video investments distributed... ?*

**Instream vs Outstream video**  
Advertisers using video (n=136)

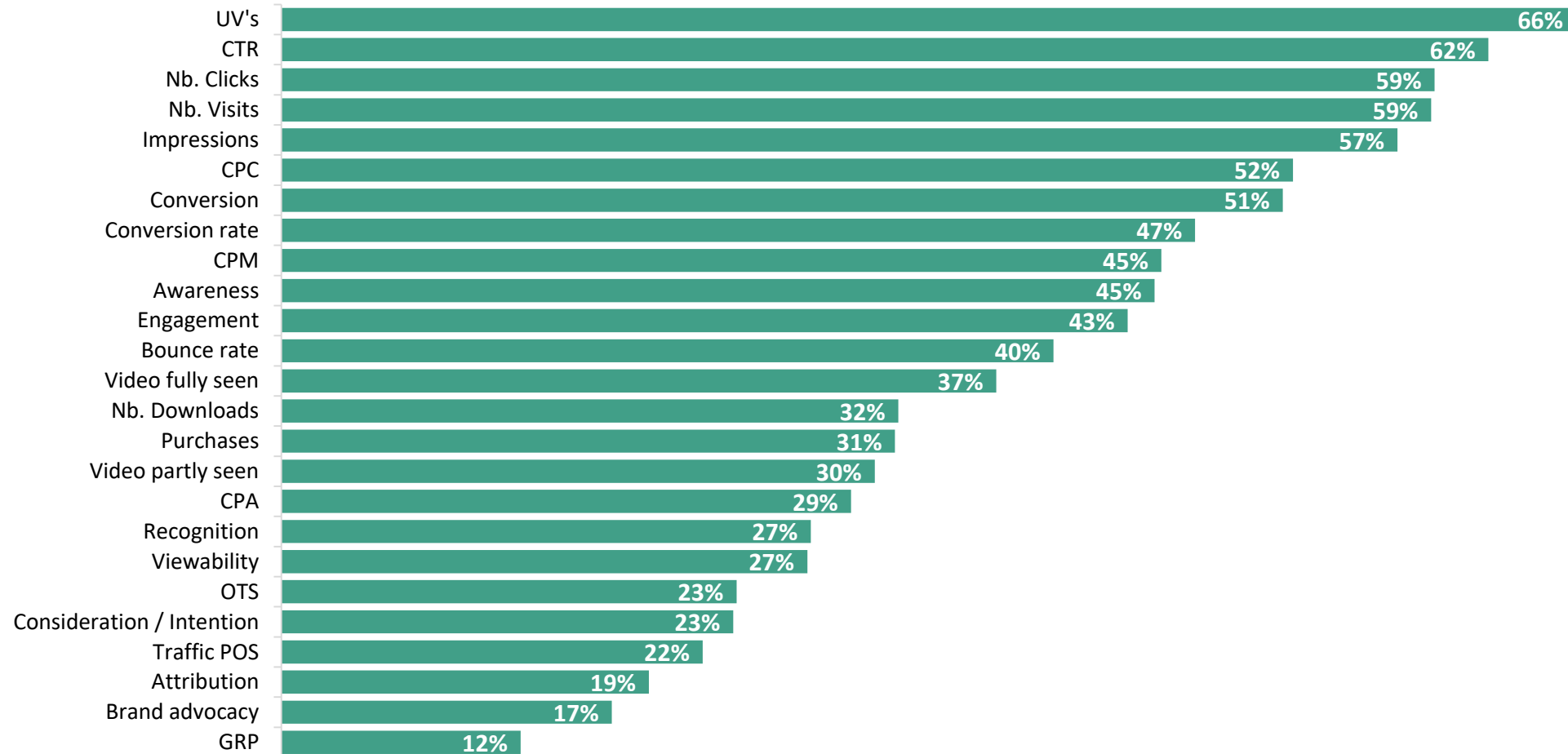


# 5 / Measured KPI's

*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=578)



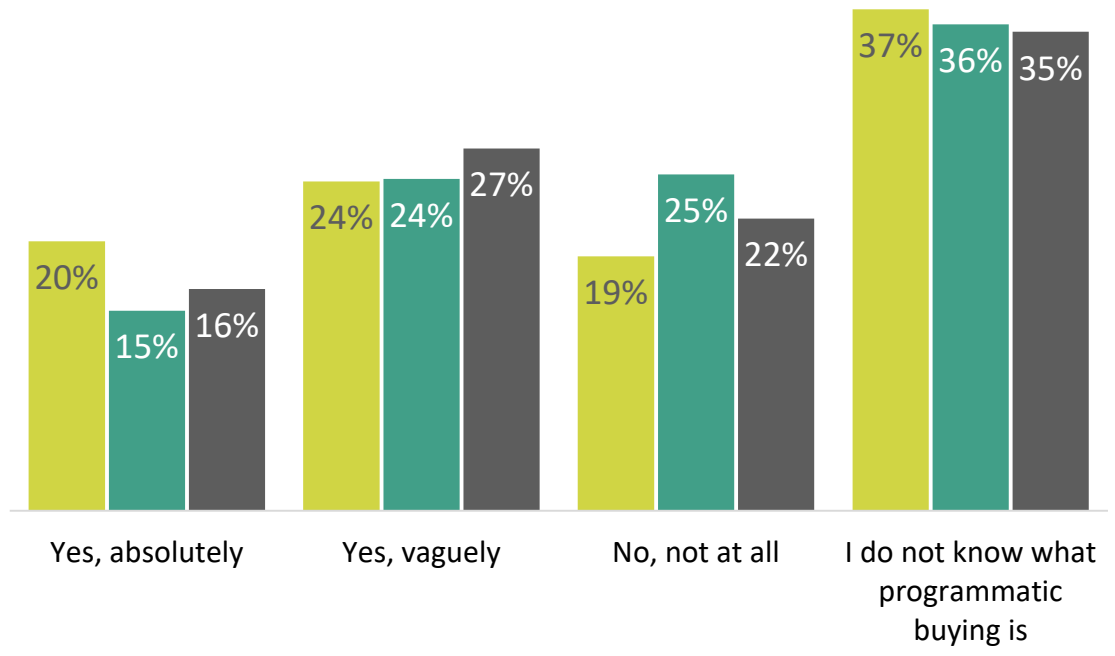
# 6 / Programmatic buying

*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

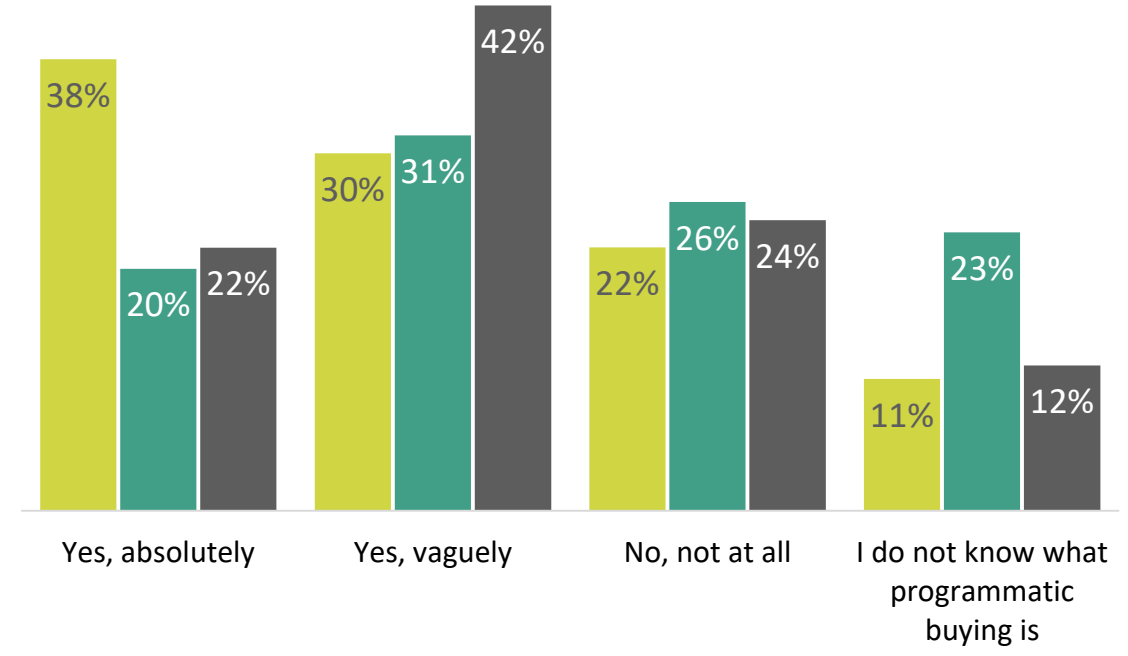
■ Wave 6 (n=117) ■ Wave 8 (n=275) ■ Wave 9 (n=232)











## Agencies

Involved in budget decision

■ Wave 6 (n=128) ■ Wave 8 (n=166) ■ Wave 9 (n=174)



**55% of digital budget** is spent programmatically

	Share of Digital mix		Share of Programmatic
 SOCIAL	24%	x	100%
 PAID SEARCH (SEA)	18%	x	100%
 DISPLAY	15%	x	42%
 VIDEO	12%	x	37%
 NATIVE	6%	x	24%
 DIGITAL OOH	5%	x	0% (best guess)
 ONLINE AUDIO	2%	x	33% (best guess)
 INFLUENCERS	4%	x	0% (best guess)

**55%**

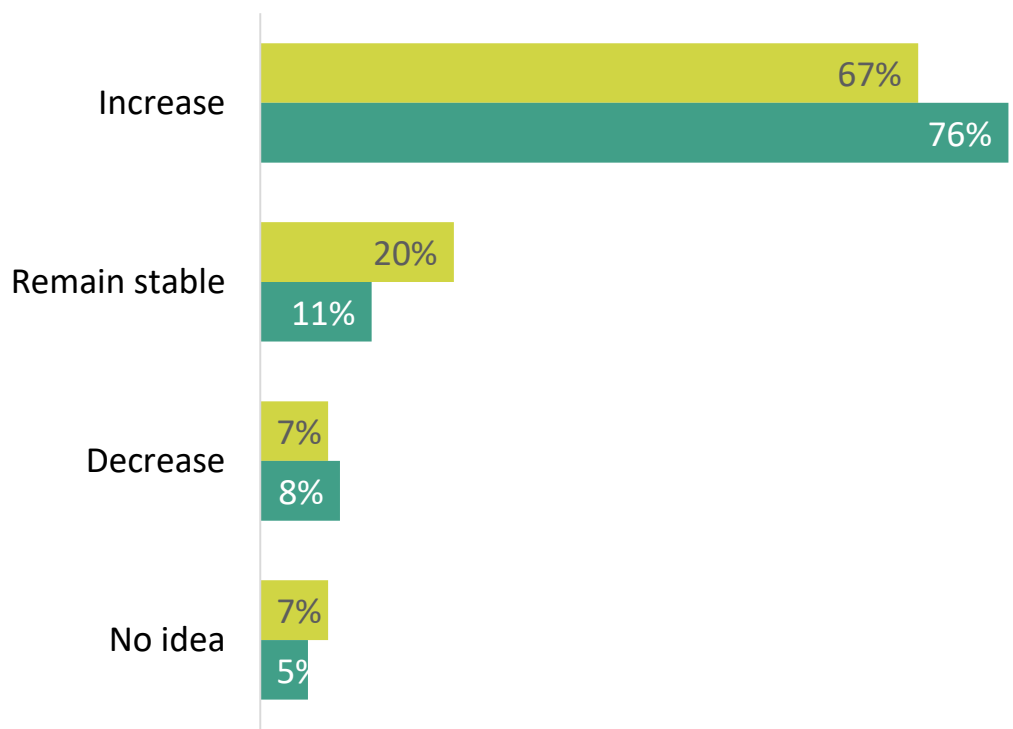
**72%** say programmatic will continue to grow

*To what extent will the share of the programmatic evolve over the next 12 months?*

**Programmatic budget : future evolution**

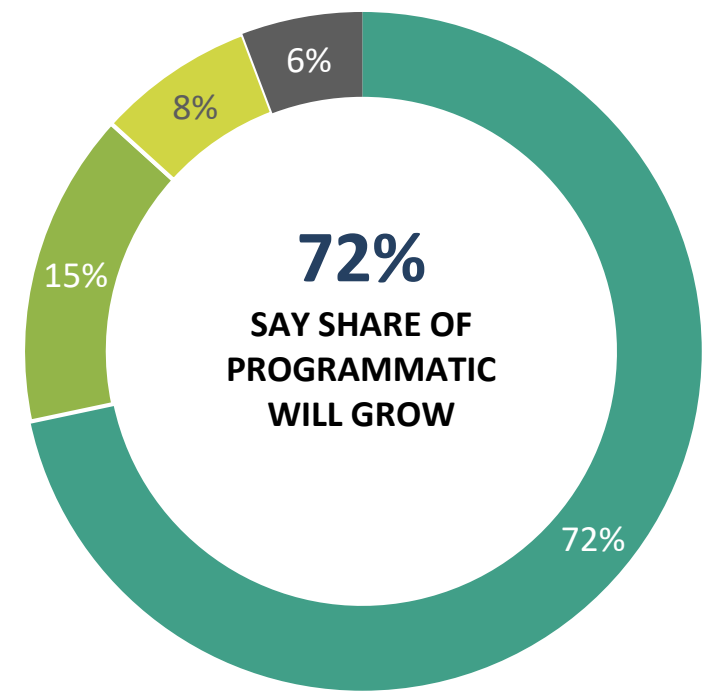
Knows how much budget is programmatically bought

■ Advertiser (n=102) ■ Agency (n=124)



**Programmatic budget : future evolution**

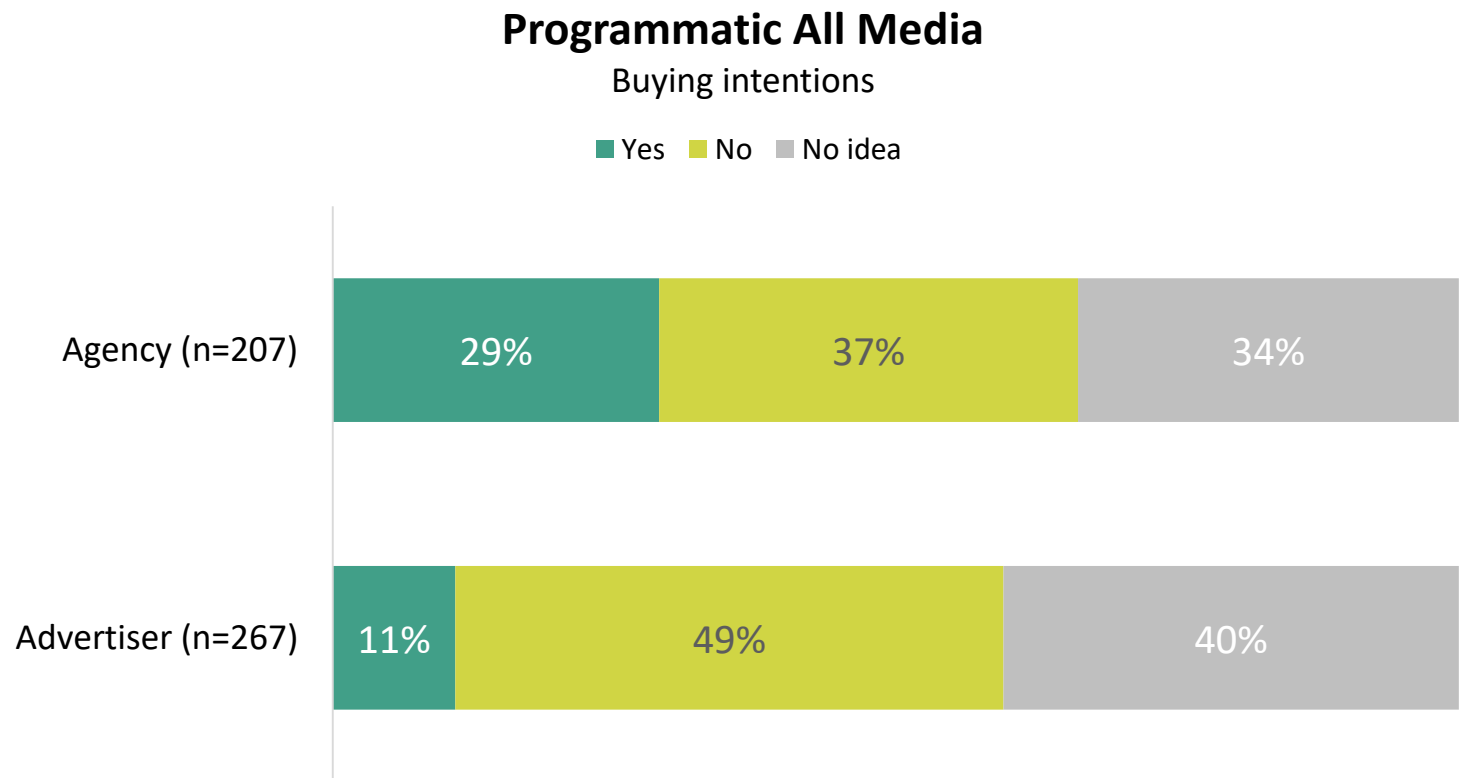
Advertisers + Agencies - know how much budget is programmatically bought (n=226)





# Both advertisers and agencies remain careful about **programmatic all media**

*Did you, in 2018, or do you plan, in 2019, to buy media space in the traditional media (TV, Radio, Print, OOH, ...) via programmatic buying?*

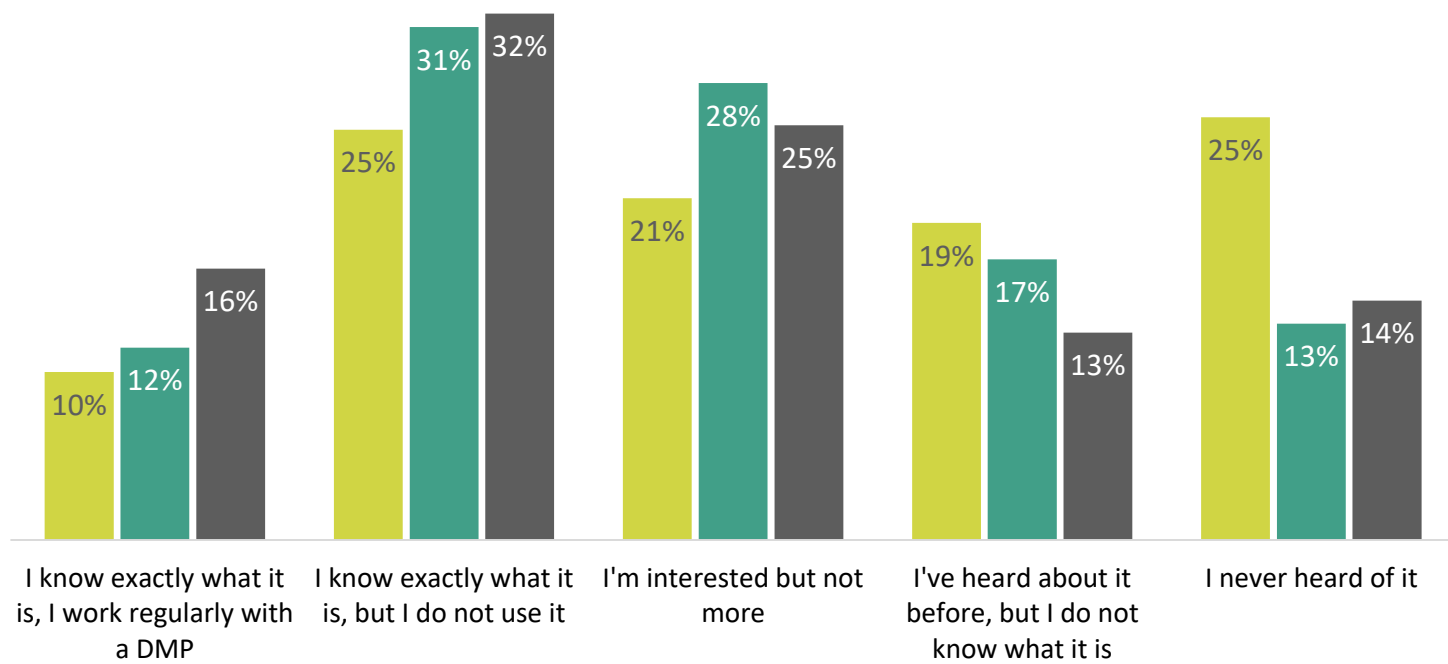


# 7 / Data Management Platform

How familiar are you with the concept of DMP?

**Knows about DMP**

■ Advertisers (n=267) ■ Agencies (n=207) ■ Media (n=104)



Three sources of data are generally identified in a DMP... Can you tell how much of each of these sources you use?

**Source of data used**

Basis : works regularly with a DMP (n=68)

■ Often ■ Sometimes



- Online share of 40% of media mix in line with Belgian surfer’s behavior.
- Always-on presence confirmed.
- GAFAs large share of Belgian market confirmed, with Social and Search as leading digital channels.
- Classical display and Video rank 3<sup>rd</sup> and 4<sup>th</sup>.
- Social more used by companies with smaller budget.
- More diversified digital mix: OOH, online audio, native & influencers represent 1/5<sup>th</sup> of digital budgets.
- In-housing still limited.
- KPIs remain short term oriented.
- Programmatic represents 55% of the digital media budget (incl. social & search).
- Programmatic and DMP still require education, mainly on advertiser side.

## KEY TAKE-AWAYS /