



Working Group

Commercial communication

2.0

Spring session:
Mapping changes

2018 objectives of the WG

- To know more about new advertising techniques and the future of commercial communications
- To see how stakeholders cope with (and react to) the changes brought by new technologies and changing consumption patterns
- To hear about their expectations from regulators
- *(in Bratislava) To address the role of regulators and self-regulators, especially regarding the new AVMSD*

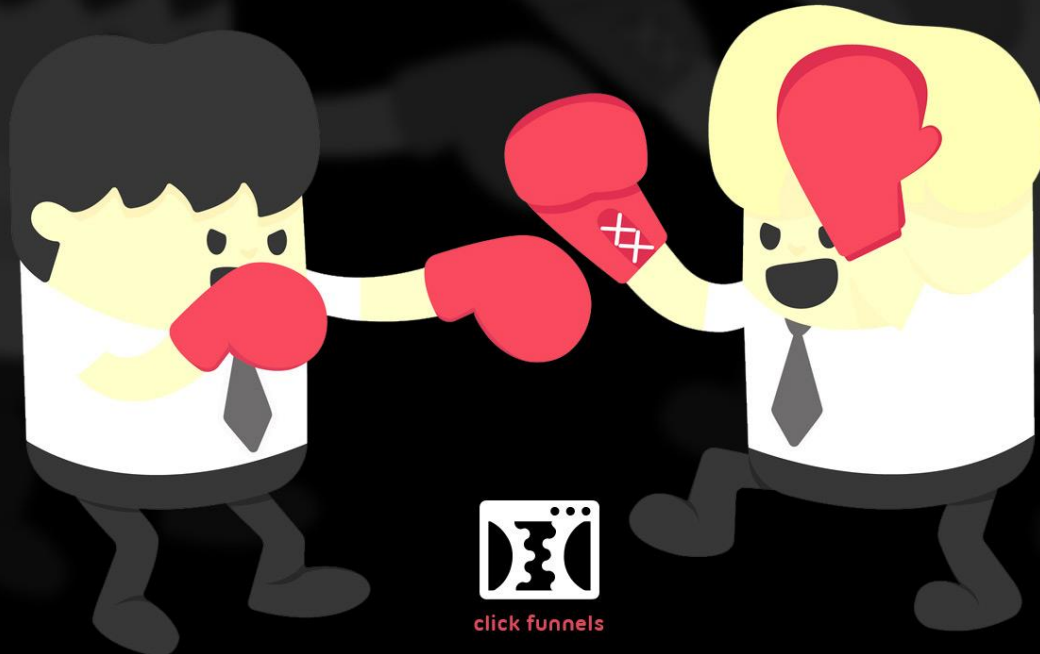
2018 objectives of the WG



2018 objectives of the WG

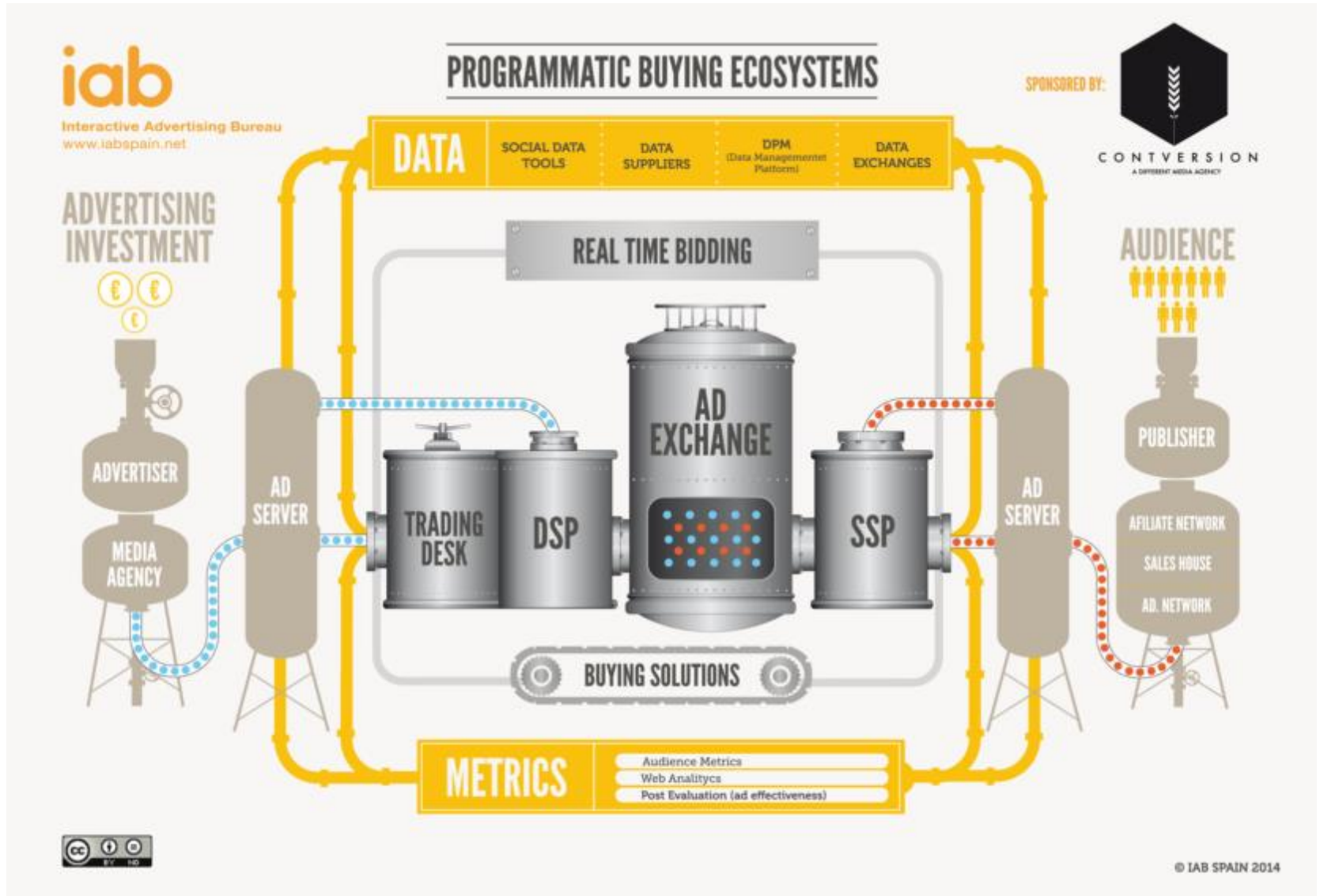
NATIVE ADVERTISING VS. CONTENT MARKETING

5 MISCONCEPTIONS ALMOST ALL MARKETERS HOLD



click funnels

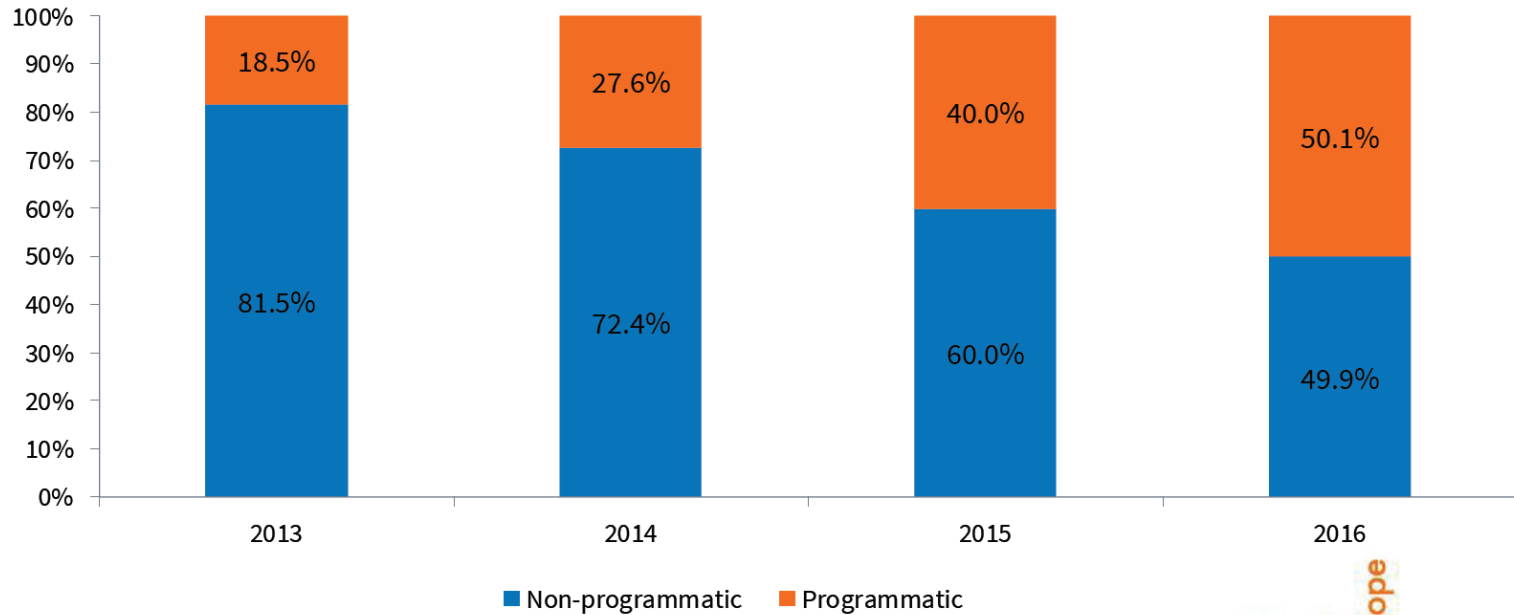
Mapping changes



Mapping changes



Traditional v programmatic



Source: IHS Markit and IAB Europe

Mapping changes

[Proximus homepage](#) > [Discover](#) > [All News](#) > [Be the first to know](#) > Personalized advertisement

Personalized advertisement? Don't panic!

by [Peter](#) [Be the first to know](#) 19/08/2016



News filtering by :

Be the first to know



Authors



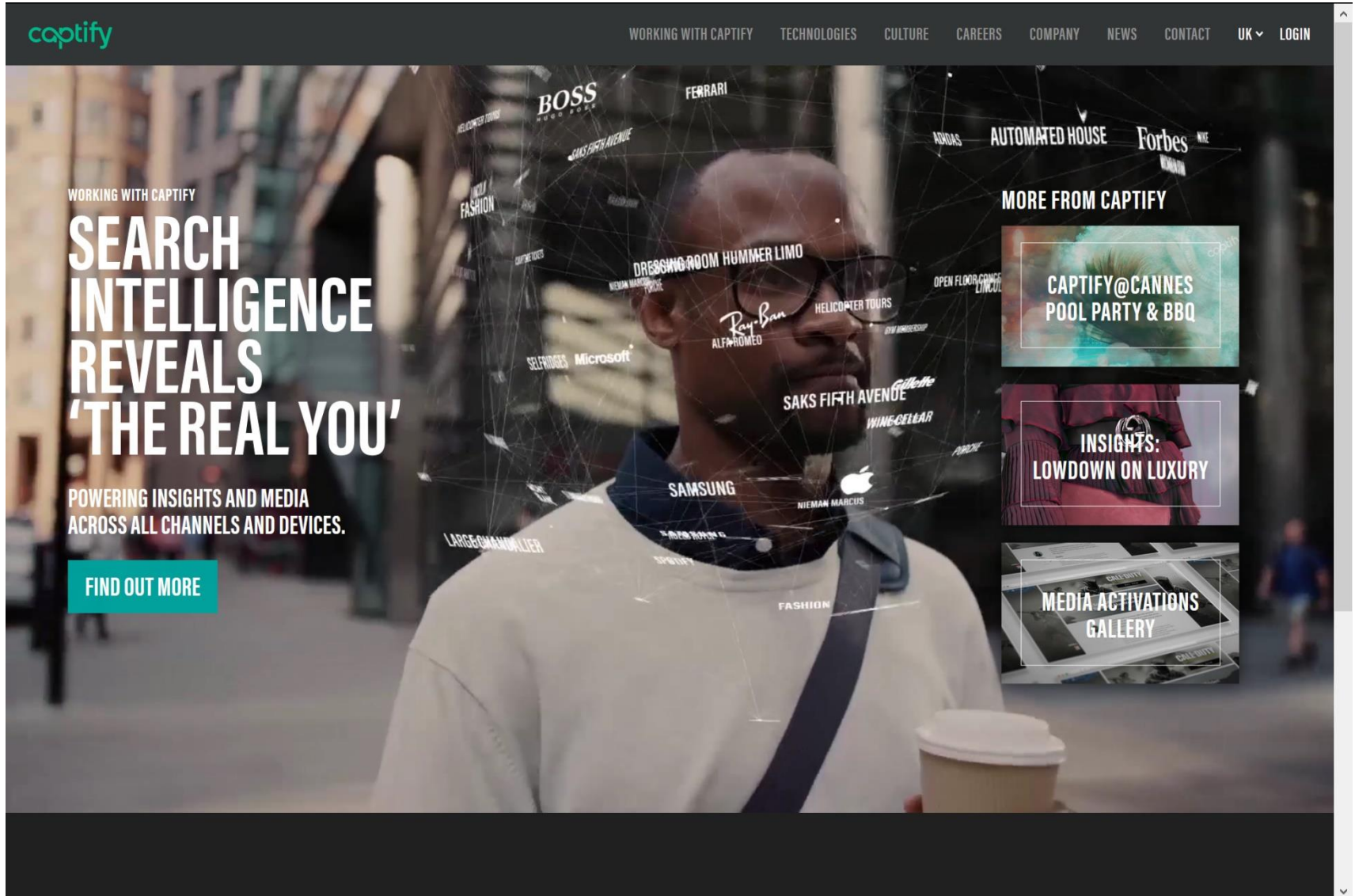
Other news



Showtime!

Discover exciting movies
and series on Be tv this

Mapping changes



Mapping changes

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OVERVIEW

TECH STACK

BRAND SAFETY

PARTNERS

CASE STUDY

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CAPTIFY'S C3 TECHNOLOGY STACK

Search intelligence powered by a proprietary end to end stack that activates search behaviors for both Advertisers and Publishers. For more information on Captify's technology, email sales@captify.co.uk

AGENCIES & ADVERTISERS

SELF-SERVE

MANAGED SERVICE

CROSS CHANNEL MEDIA ACTIVATION

MOBILE VIDEO DESKTOP

AUDIENCE - ONTOLOGY

CAPTIFY DMP

SEMANTIC ENGINE

LANGUAGE - DICTIONARY / THESAURUS - MIS-SPELLING - NEGATIVE - CONTEXT - TAXONOMY

DATA STREAMING PROCESS

ATTRIBUTION ENGINE

INSIGHTS

PUBLISHERS

VISUALISATION & ACTION

INSIGHTS / ANALYTICS

33
BILLION
SEARCHES

OUR CLIENTS

CONTACT US

LONDON

NEW YORK

QUICK LINKS

ADVERTISERS

PUBLISHERS

CAREERS

COMPANY

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ACCOUNTS@CAPTIFY.CO.UK

HR@CAPTIFY.CO.UK

Mapping changes

INTERACT MILAN 2018

f t in i Search ...

DISRUPT
ADAPT
REINVENT

MAY 23-24 2018 MILAN

INTERACT MILAN 2018

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Interact is a must-attend event for the digital advertising industry. For over 12 years, leading European advertisers, industry experts, agencies & media owners get inspired, meet & share best practices.

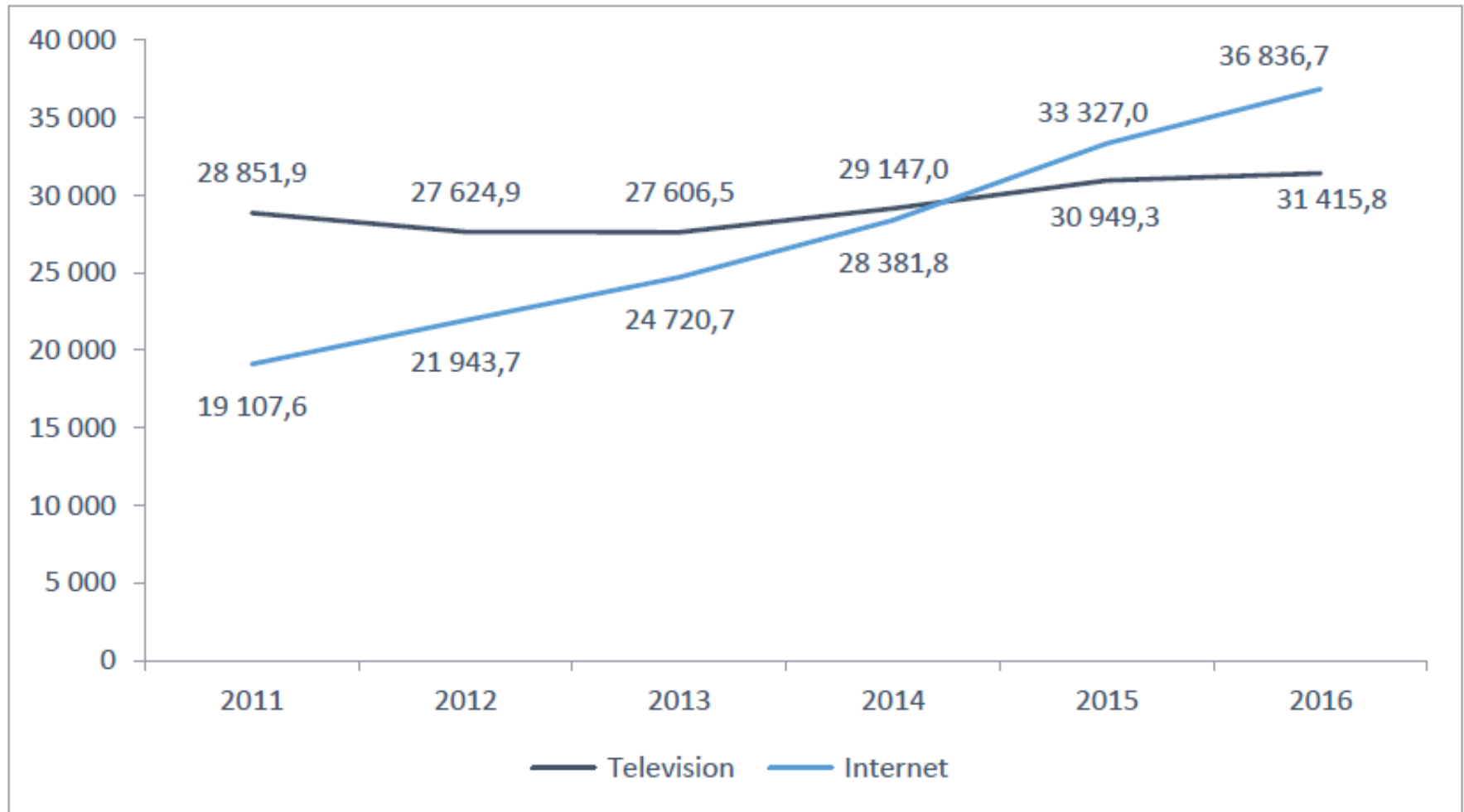
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Market context

- In other sectors, market players have the opportunity (or the obligation) to continuously (or rapidly) make their business model shift from ad revenues towards sub revenues.
- This is not (or less) true for AVMS providers:
commercial communications remain the main source of funding for most of the players that EPRA members regulate
- Yet, these funds are collected in a highly competitive environment in which the main driver is not television anymore.

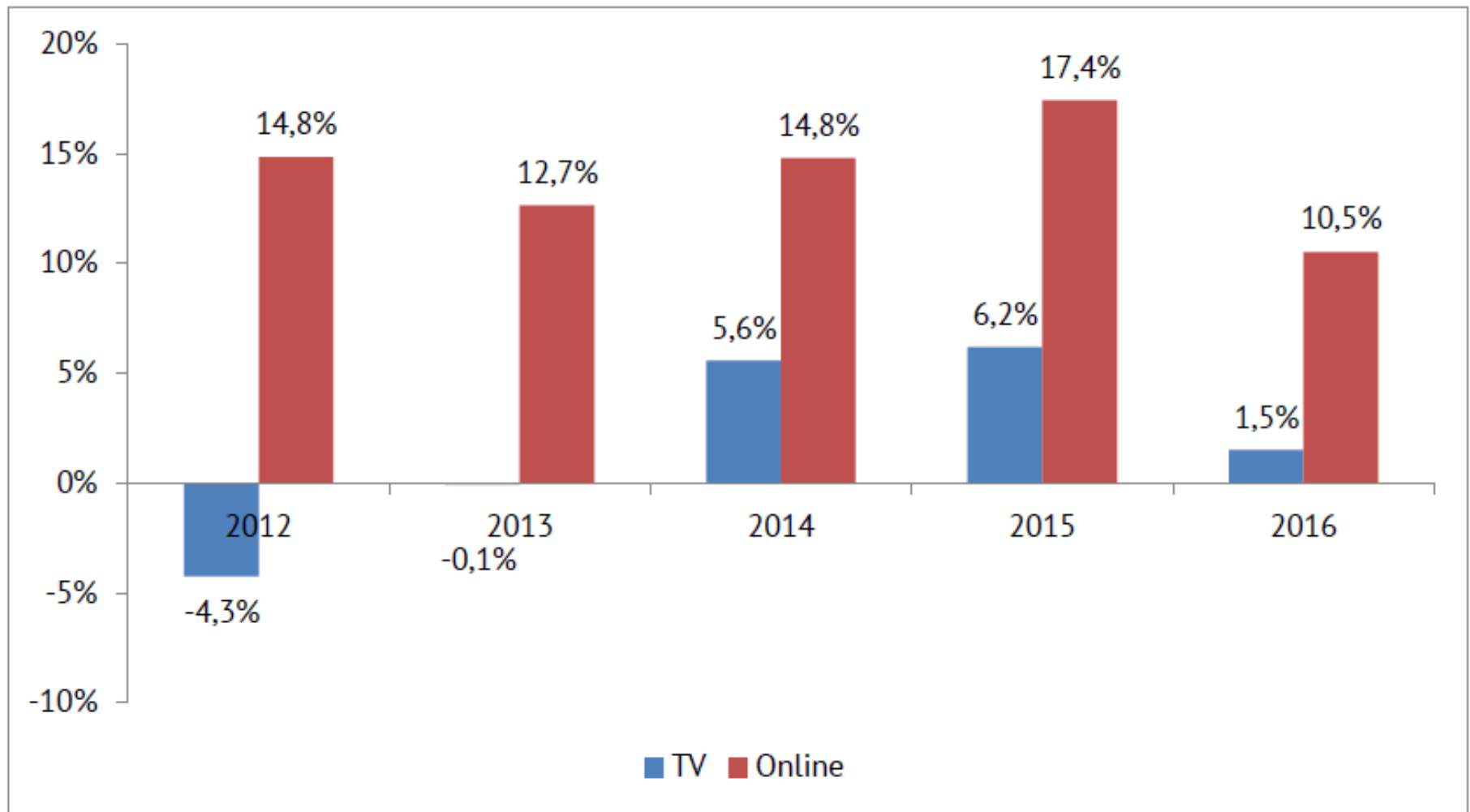
Market context

Figure 5 – TV and online advertising in the EU 2011-2016, in EUR million



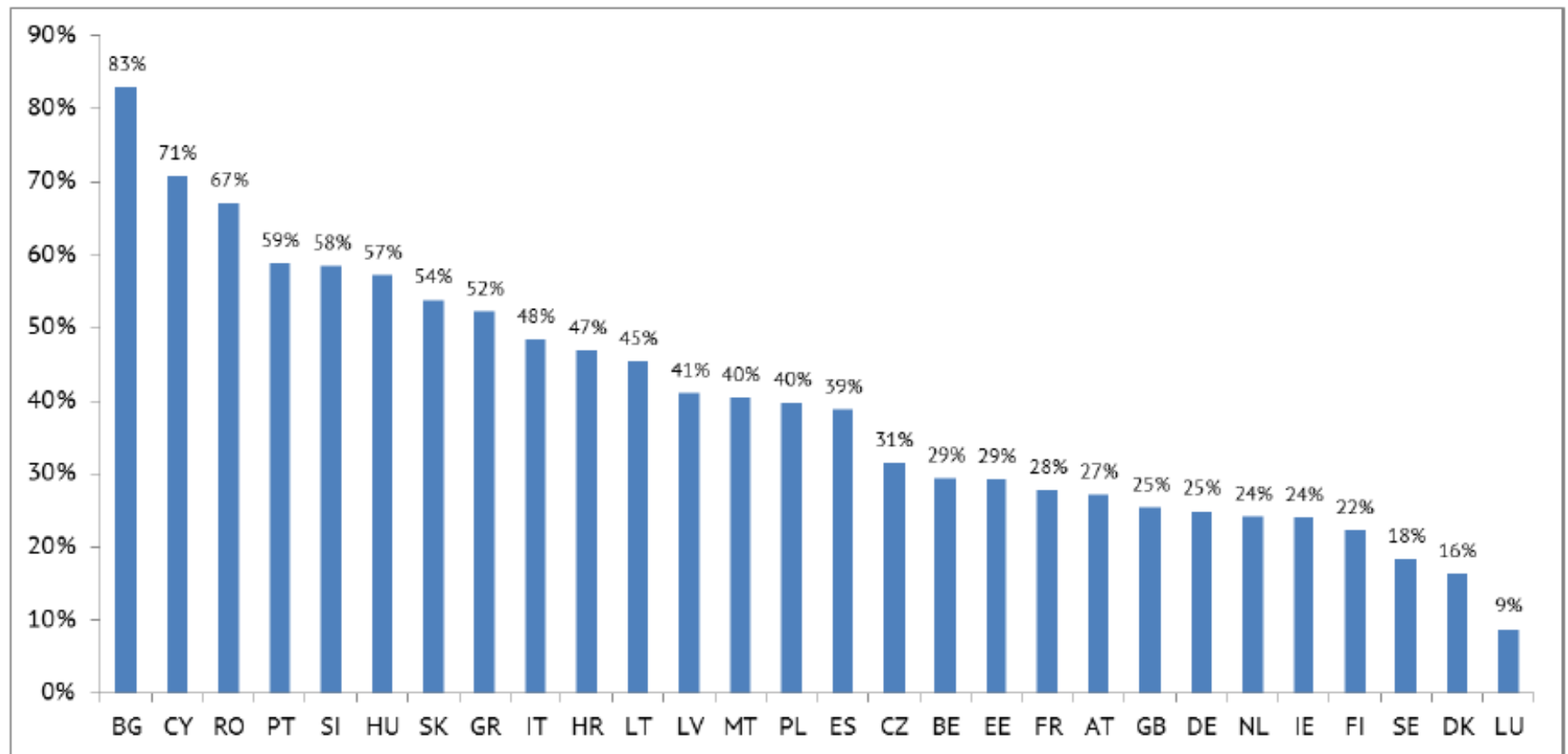
Market context

Figure 6 – Online and TV advertising yearly growth rates, in %



Market context

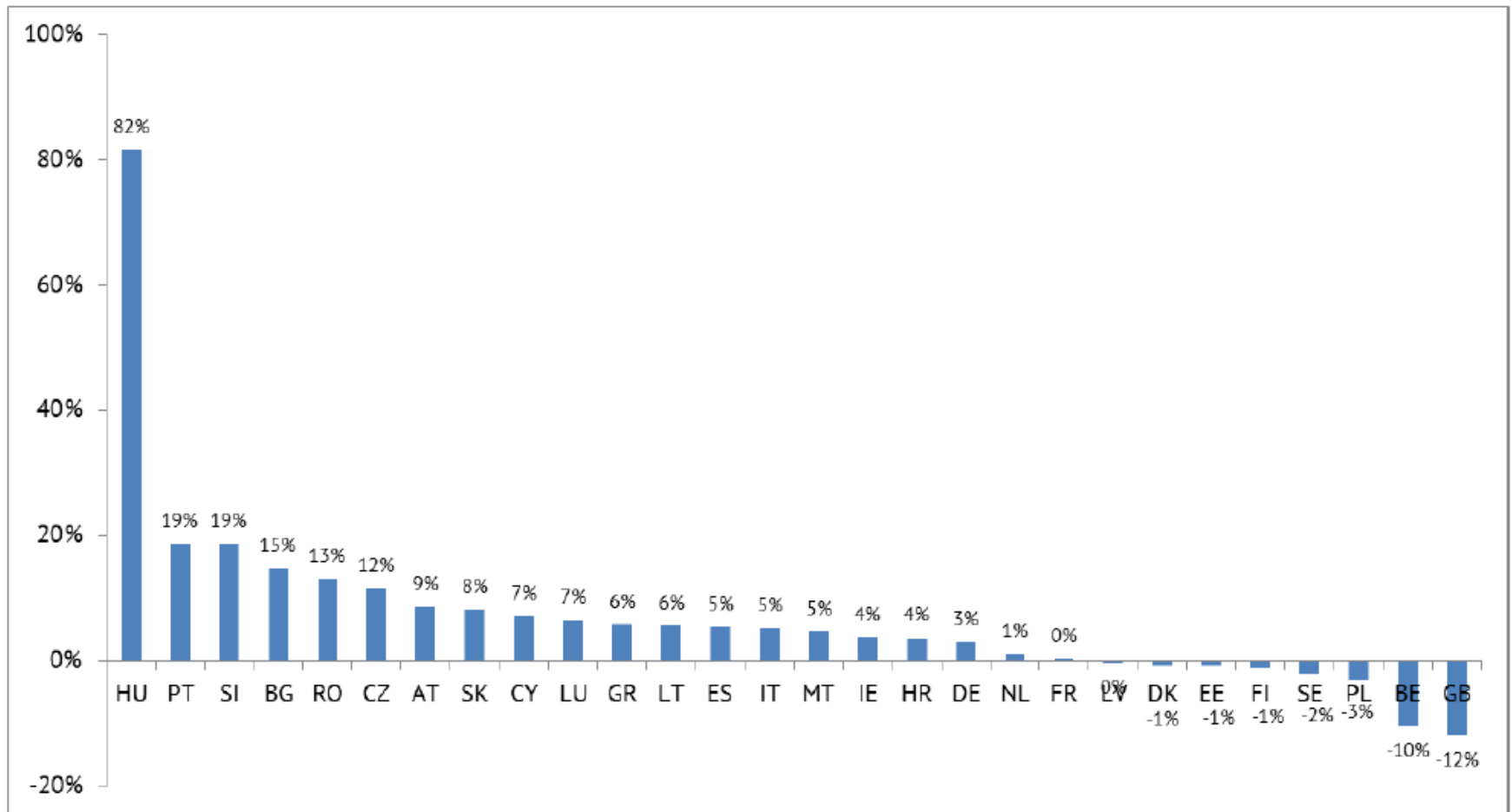
Map 7 – Share of TV advertising out of total advertising by country in 2016, in %



Source: Warc

Market context

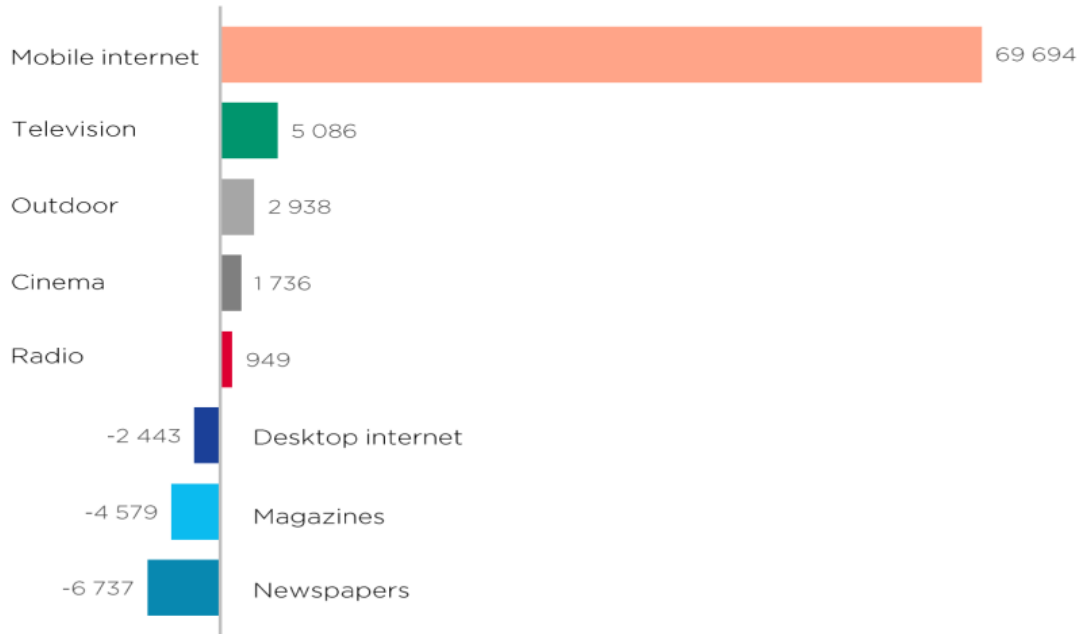
Map 6 and Figure 11 – TV ad growth 2015/16 by country, in %



Source: Warc

Market context

CONTRIBUTION TO GLOBAL GROWTH IN AD-SPEND BY MEDIUM (FORECAST)
(USD MILLION, 2017-2020)



**Mobile will
be by far the
main driver
of global
ad-spend
growth**

Between 2017 and 2020, mobile advertising is expected to contribute USD 70 billion to global ad-spend growth, while desktop and print advertising will experience negative developments.

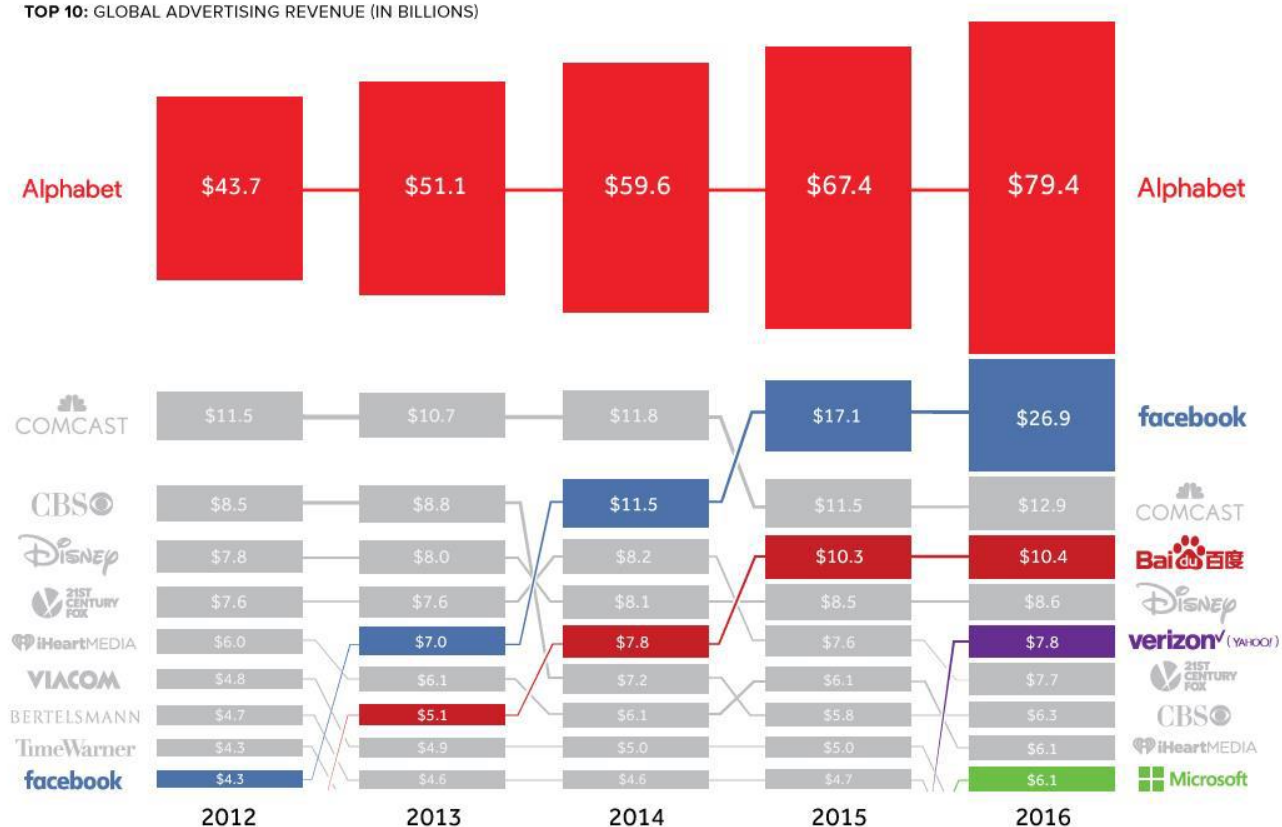
Market context

Chart of the Week

THE TECH TAKEOVER OF ADVERTISING

Legacy media brands are falling hard and fast

TOP 10: GLOBAL ADVERTISING REVENUE (IN BILLIONS)



SOURCE: Bloomberg, Zenith Media

visualcapitalist.com



Market context

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Turner President: 'It's Time To Retire Nielsen Television Metric'

by Alex Weprin, May 16, 2018

Turner Broadcasting executives announced Wednesday their intention to go all in on audience targeting -- encouraging media buyers to shift away from buying only based on Nielsen ratings, TV's currency standard bearer.

Ahead of the company's upfront presentation at Madison Square Garden, Turner president David Levy instead pitched the company's audience-targeting capabilities, touting performance-based buys and targeting and how they can work to improve the traditional metrics.

"We are in a new era of media, and it's time to retire the Nielsen television metric. While it undoubtedly served its purpose, it no longer fully captures how to successfully measure an audience in today's landscape," Levy said.

"Audience targeting works, and is generating drastically greater results for our advertising and marketing partners. The time is now—this upfront—for advertisers to change how they think about the value of their marketing and invest in audience targeting."

advertisement

advertisement

During the presentation, that theme continued. The company highlighted the performance of its shows in the TV ratings, yes, but also on social media, on VOD and streaming, and in live events. Turner encouraged advertisers and



the whole lot, not just a 30-second spot.

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NBC Wins Another Season In 18-49, CBS Tops In Total Viewers

Price For TV Networks With Fewer Ads? A Modest 7% Premium

Nickelodeon Exec Kaufman Upped To President, Viacom/Nickelodeon Global Consumer Products

Home Entertainment: Streaming Rises, But Rentals Drop

Clarification: Nielsen's L3, L7 Data

On the other hand...

**DIGIDAY** UK

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IP

PODCASTS

EVENTS

AWARDS

CAREERS

MARKETING ON FACEBOOK

Facebook video ad viewability rates are as low as 20 percent, agencies say

JUNE 26, 2017 by [Jessica Davies](#)

On the other hand...

what a difference a year makes at adidas

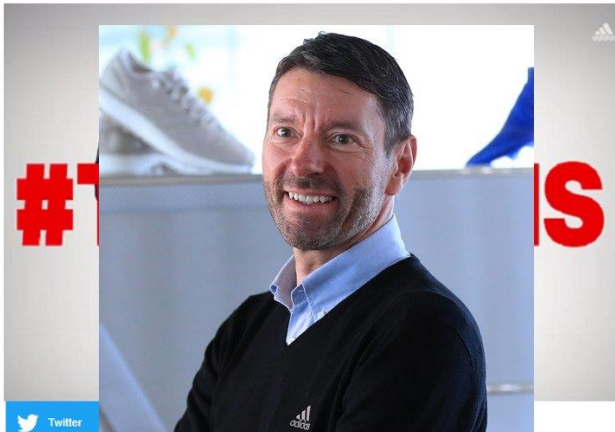
2017

2018

Home	Ads	Content	E-commerce	Mobile	Regulation	Search	Social	V
Apple	Amazon	Facebook	Google	Twitter	WhatsApp	You Tube		

Adidas to shift TV budget to digital: "You don't see any TV advertising anymore"

March 21, 2017



DIGIDAY									
NEWS	DIGIDAY +	IP	PODCASTS	EVENTS	AWARDS	CAREERS			

Sources say Adidas has paused its video ads on Facebook while it reviews their efficacy



Social context

- AVMS providers are under pressure in terms of business models :
 - Difficulty to shift business model
 - Highly competitive environment
- *And at the same time they are also “under pressure” in terms of consumer expectations:*
 - *High level of expectations from the consumers*
 - *Low level of advertising literacy (users believe they are literate but...)*
 - *Growing concerns in terms of brand safety???*

Social context

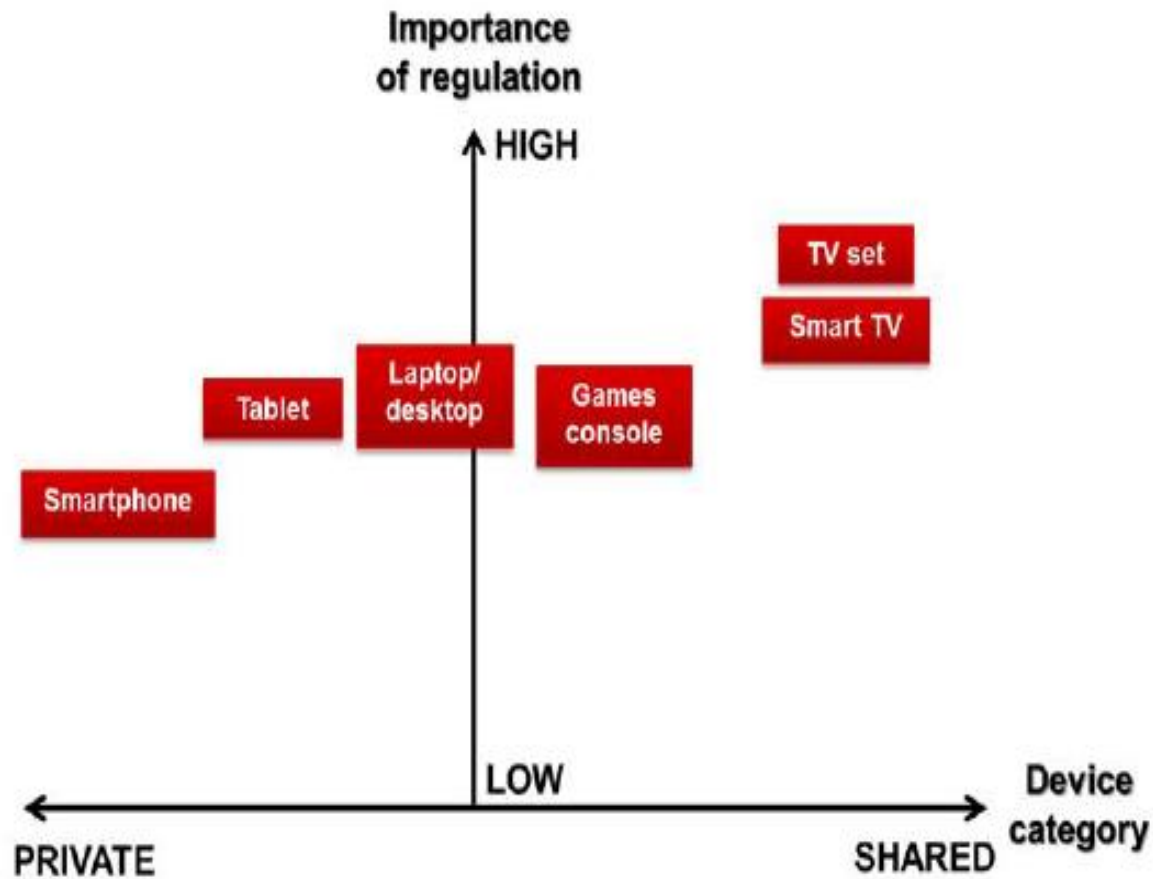
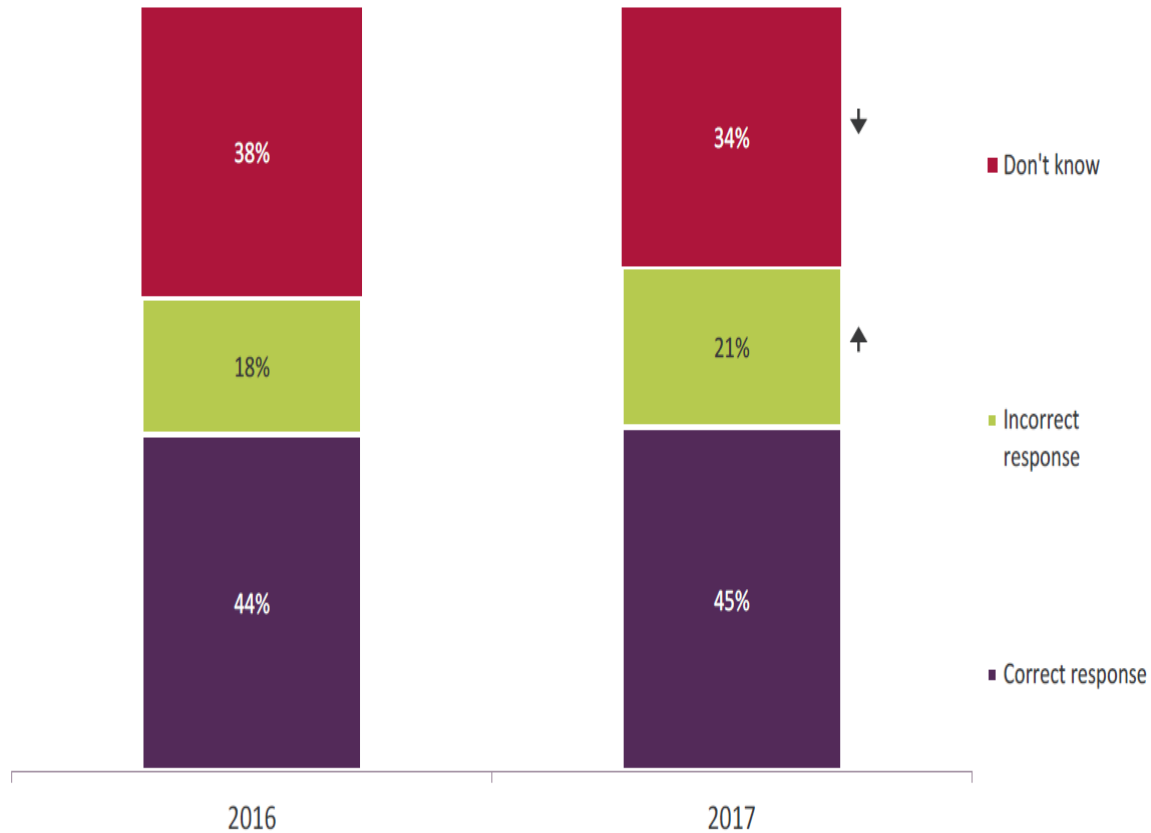


Figure 6: Devices mapped against importance of regulation and device category (private or shared)

Social context

Figure 99: Awareness of how YouTube is mainly funded: 2016-2017



Source: Ofcom Adults' Media Literacy Tracker 2017

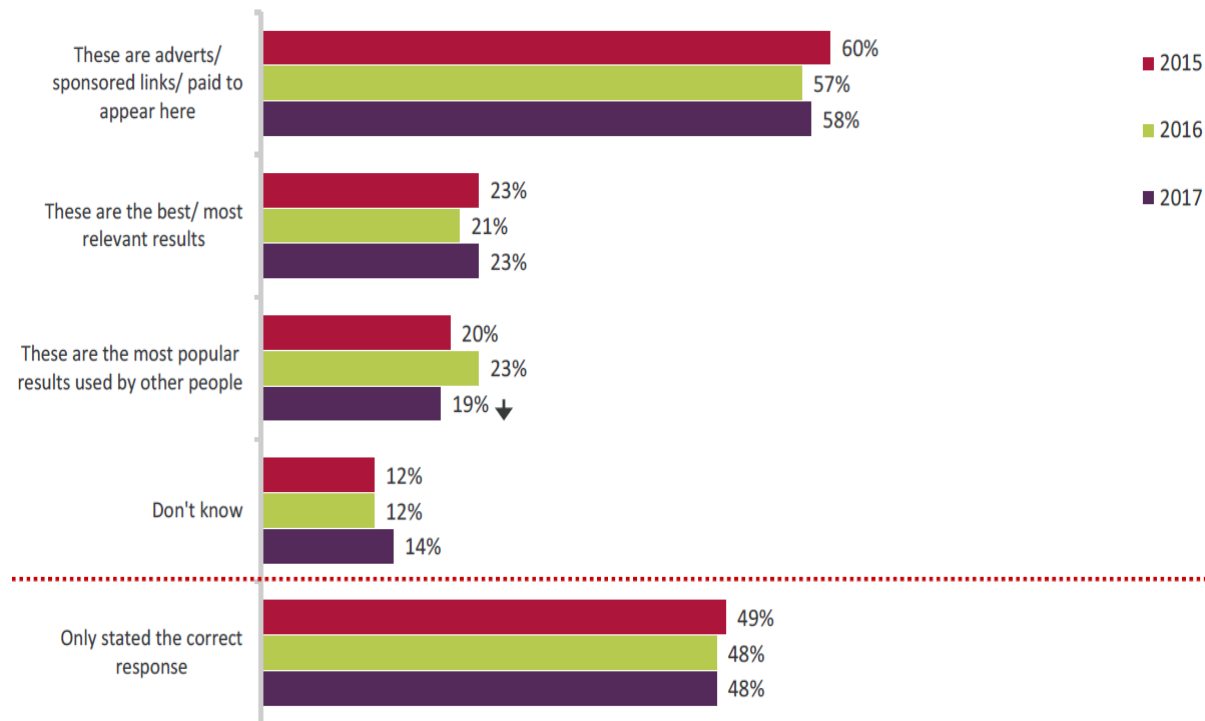
IN34. How do you think YouTube is mainly funded? (unprompted responses, single coded)

Base: All adults aged 16+ (1846 in 2016, 1875 in 2017)

Arrows show significant changes (95% level) between 2016 and 2017

Social context

Figure 124: Understanding of paid-for results returned by Google searches, among adults who use search engine websites or apps: 2015-2017



Source: Ofcom Adults' Media Literacy Tracker 2017

IN47. Here's an image (showcard of image) from a Google search for 'walking boots'. Do any of these apply to the first two results shown under the pictures? (prompted responses, multi-coded). NB – question amended in 2017 to be asked of those who have used search engines in the last year, rather than those who than ever used a search engine.

Base: Adults aged 16+ who go online and have ever used search engine websites or apps/ have used websites or apps in the last year (1516 in 2016, 1508 in 2017)

Arrows show significant changes (95% level) between 2016 and 2017

General context

- All this context puts AVMS providers in an uncomfortable regulatory position:
 - *They cannot avoid falling under the material/territorial scope dealt with by a media regulatory authority*
 - *They have to compete against less regulated (or unregulated) players*
 - *They know that regulators will continue to take viewers' expectations into account (and even sometimes make soft regulatory incursions in territories which do not necessarily fall under the material scope of media regulation)*

General context

- All this context puts AVMS providers in an uncomfortable regulatory position:
 - *They have to cope with an incredibly complex and fragmented regulatory framework:*
 - *AVMS D*
 - *E-Commerce D*
 - *Unfair Commercial Practices D*
 - *Misleading and Comparative Advertising D*
 - *Tobacco Advertising D*
 - *Medicinal Products D*
 - *Data protection D and GDPR*

Debate

- **Conor Murray**, Director of Regulatory and Public Affairs



- **Heiko Zysk**, Vice President Governmental Relations and Head of European Affairs



- **Bruno Martins**, lawyer - Union luxembourgeoise des consommateurs

