



G E T T O G E T H E R



WELCOME

UMA GET TOGETHER

The path to strong communication





Moderator

Bart De Pauw





UMA Wrap-up

Hugues Rey





State of the Union



UMA Media Date

31st of August 2023



What is the role of a Trade Association?

- Promote, develop, and safeguard a particular profession
- Represent the interests of those working in a profession
- Responsible for maintaining standards, procedures and quality within the industry



Highlight
&
Celebrate
Industry
“Craftmanship”

Be-Inspired.media



Go For Impact
**In-Home
Advertising**





ymce
Young Media &
Channel Expert award



**Effective, balanced collaboration between
all the Members of an eco-system
is a source of
value creation for all the Stakeholders**

Members – Clients – (Media) Partners – Customers – Citizens

COMMCAREERS.BE



THE PLATFORM THAT CONNECTS
AGENCIES, SCHOOLS, STUDENTS
& JOBSEEKERS



2023

Media and Production
Carbon Calculator

2023

DIVERSITY & INCLUSION
GUIDE
DURING THE
CREATIVE PROCESS



MEDIA SCHOOL



14
Sep

CYCLE

Media School: Media Essentials 2023

Le cycle « Media Essentials » est un cursus de base qui propose un aperçu global et actuel des médias belges tant traditionnels que digitaux. Automne.

> Plus d'info



14
Sep

STARTERS KIT

Starterskit: Digital Metrics

Un cours introductif au paysage digital belge, particulièrement adapté aux starters.

17h30-20h30. En présentiel

> Plus d'info

ALL YOU
CAN EAT



EMPOWERING MEDIA PEOPLE



30th of August - Working Together

Maintaining standards, procedures and quality within an industry







“Algorithms are going to replace **25-year-old media planners** in fairly quick time. There won't be **250,000 people** at the holding companies running media planning and buying networks around the world”

Sir Martin Sorrell (2023)

A black and white photograph of Joe Walsh performing on stage. He is wearing a dark t-shirt with the word "SAVAM" visible, and is playing a Fender Telecaster electric guitar. He has long, wavy hair and a mustache. A microphone is positioned in front of him. The background is dark with some stage lights.

“A.I. can’t destroy a hotel room.
It can’t throw a TV off the fifth floor into the pool and get
it right in the middle.”

Joe Walsh - 13/7/2023

+ Attitude can be mimicked but it's fostered th

**Carry on our
development of
reliable & strong
UMA
to empower the
Belgian Advertising
Eco-system**





The wrong & the real of it


Grace Kite



The wrong and the real of it

August 2023



The image features three overlapping circles of different colors (black, orange, and yellow) arranged horizontally on a solid yellow background. Each circle contains white text. The black circle on the left contains the text 'Back to work with a bump?'. The orange circle in the middle contains the text 'You can rely on bothism'. The yellow circle on the right contains the text 'Online is not the enemy'.

Back to
work with a
bump?

You can
rely on
bothism

Online is
not the
enemy

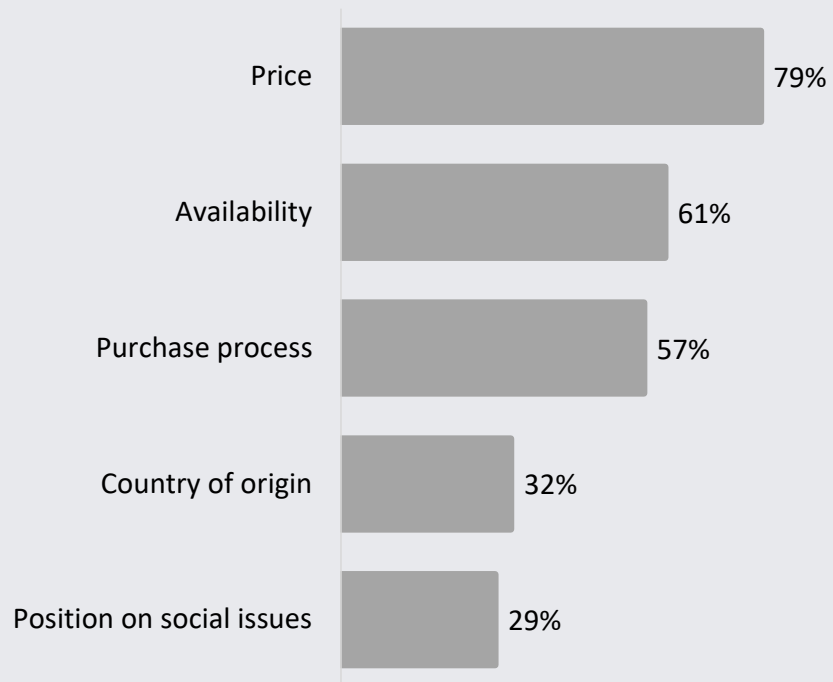
Back to work with a bump?



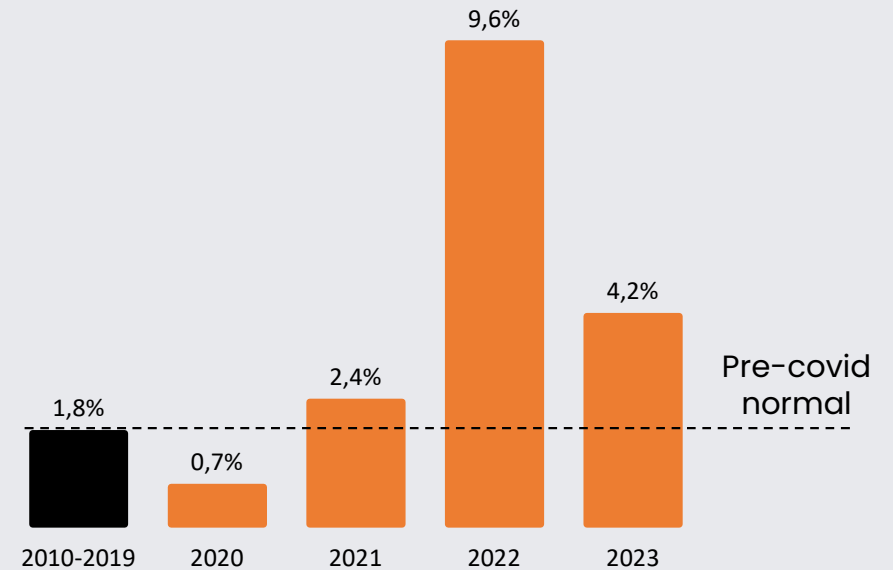
It's not easy to be a marketer in Belgium in 2023

The thing potential customers care most about is price, and prices are going up fast

Which of these have a major impact on your purchase decisions?



Inflation: Whole economy YoY increase in prices



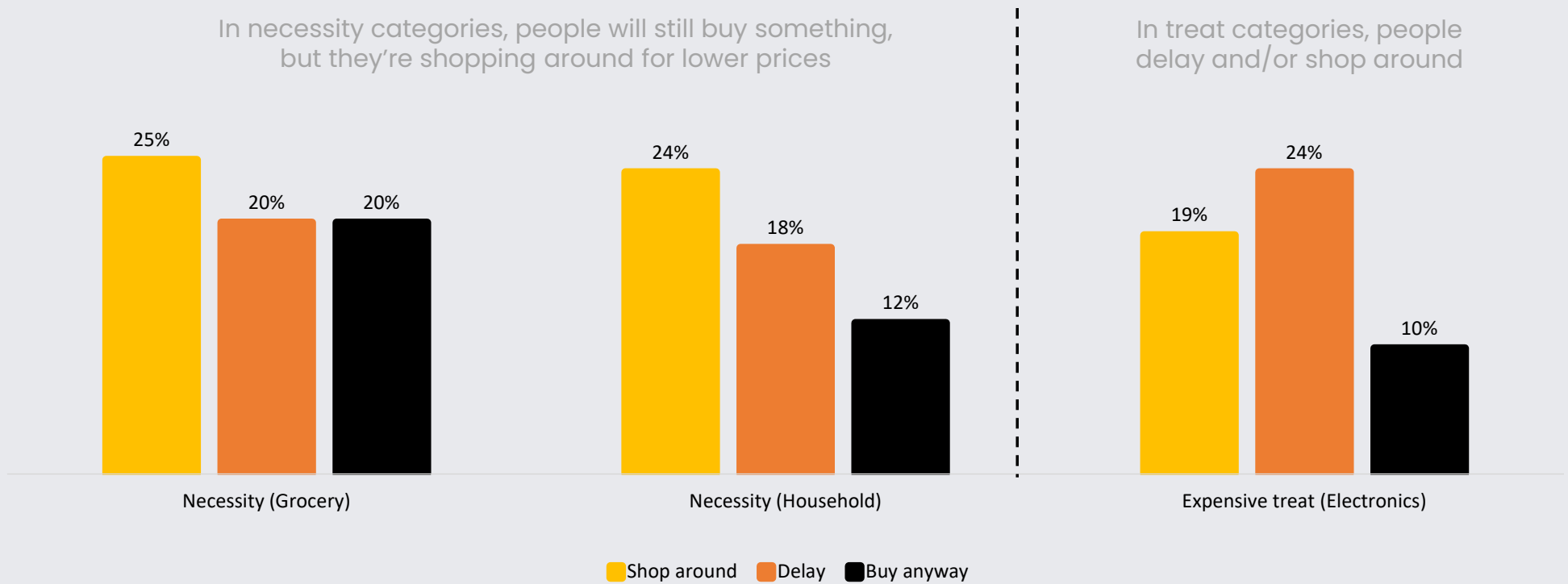
Even with indexed salaries, higher prices make people shop around

And in some categories people delay their purchase – maybe indefinitely

If you want an item but it's price has gone up, what would you do?

In necessity categories, people will still buy something, but they're shopping around for lower prices

In treat categories, people delay and/or shop around



And there's uncertainty about which media channels work best

The nerds disagree with the judgement of advertisers and agencies



Television

Radio

Press

Online video

Magazines



Online video

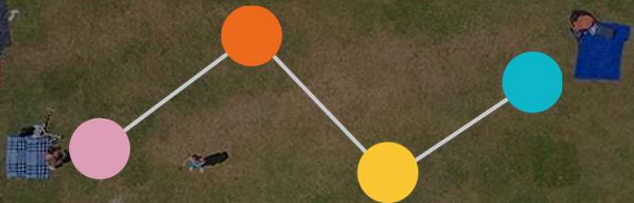
Social media

Radio

Television

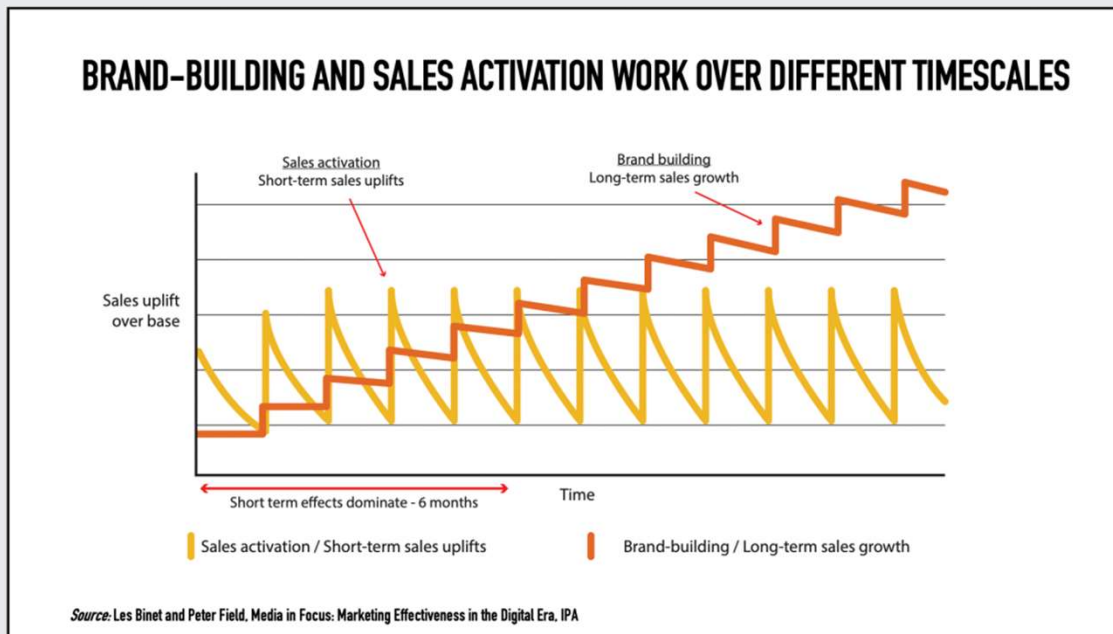
Direct Mail

You can rely on bothism



A reminder of the theory: Some advertising lasts longer than others

And it's the long-lasting type that brings sustained sales growth

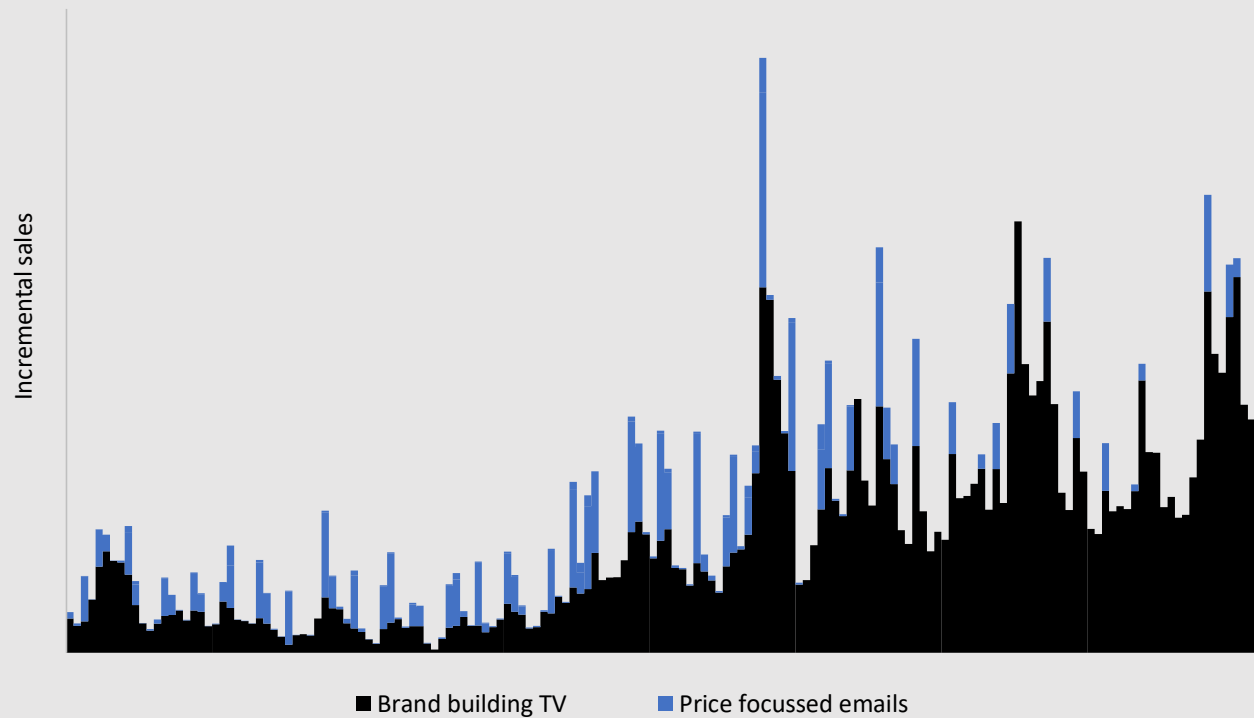


- This is a famous chart, by Les Binet and Peter Field
- It's a theoretical illustration of how advertising works

It's not just a theory

Many brands don't get growth until they have enough long-lived ads in their mix

A brand experiencing what Les and Peter describe

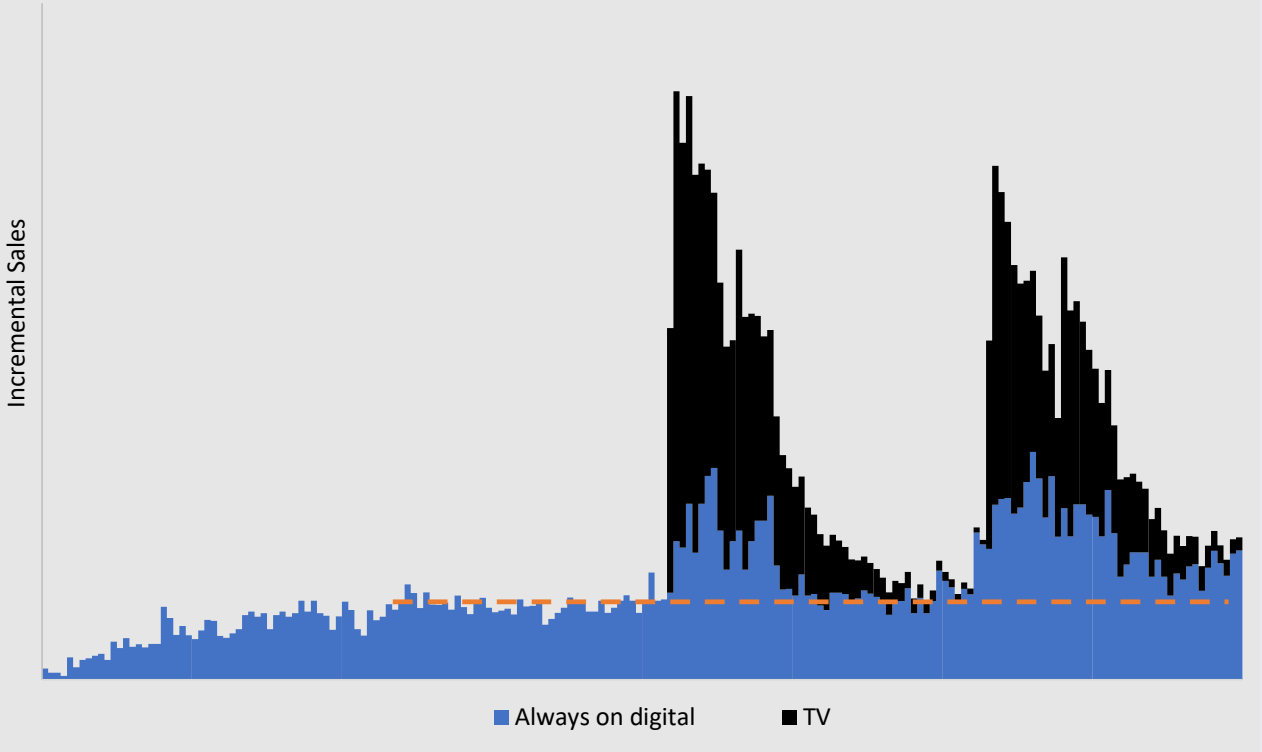


- Output from econometrics
- Email activity works
- But growth came from brand TV

Online brands can grow by scaling up short-lived ads alone

But this eventually runs out of steam, and in the end, both are needed

Always on digital drives growth, but this is limited



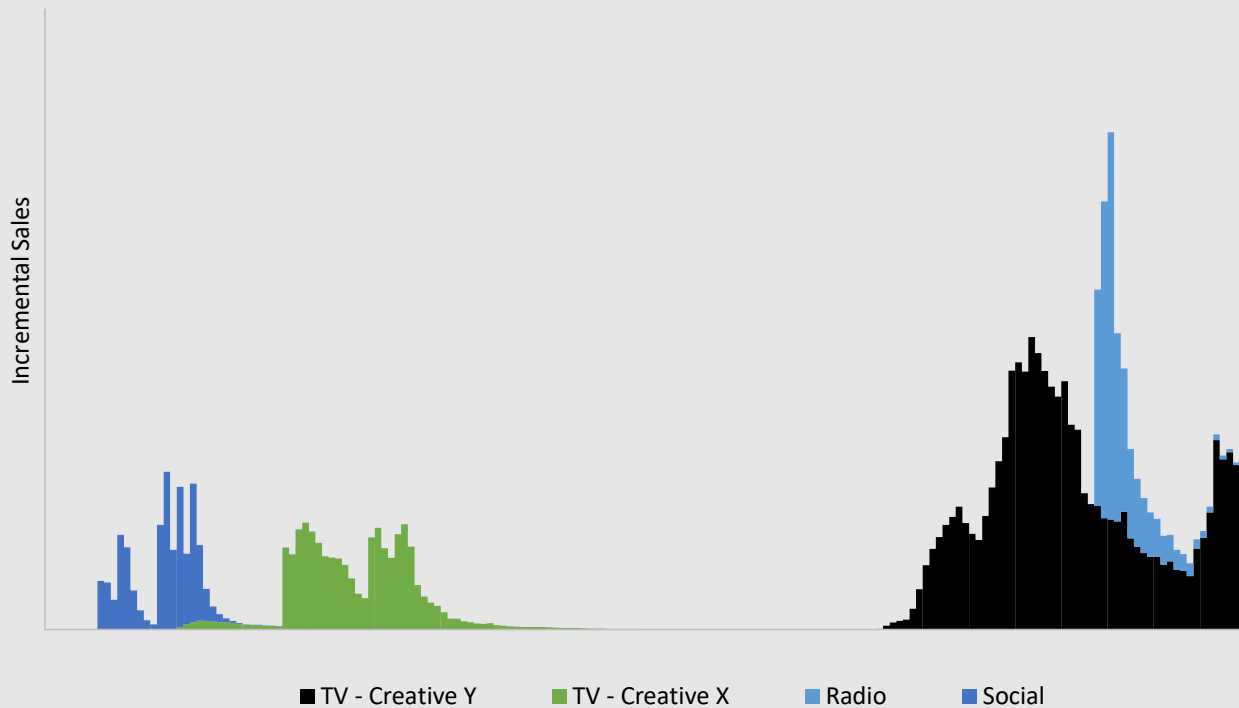
- A cheaper way to get growth
- But it can only go so far
- Brand-building is the answer
 - Direct effect
 - Raises effectiveness of digital

Source: Magic Numbers econometrics, based on the experience of several UK brands

Brand building is expensive and risky

In this example initial experiments didn't work

Experimenting to find activity that's capable of brand-building: Successful case



- Early experiments didn't work
 - Social had short-lived effect
 - Creative X wasn't strong enough
- Eventual success
 - Journey of several years
 - Risky
 - Expensive
 - A determined CMO

But if you get it right, you'll be able to charge more

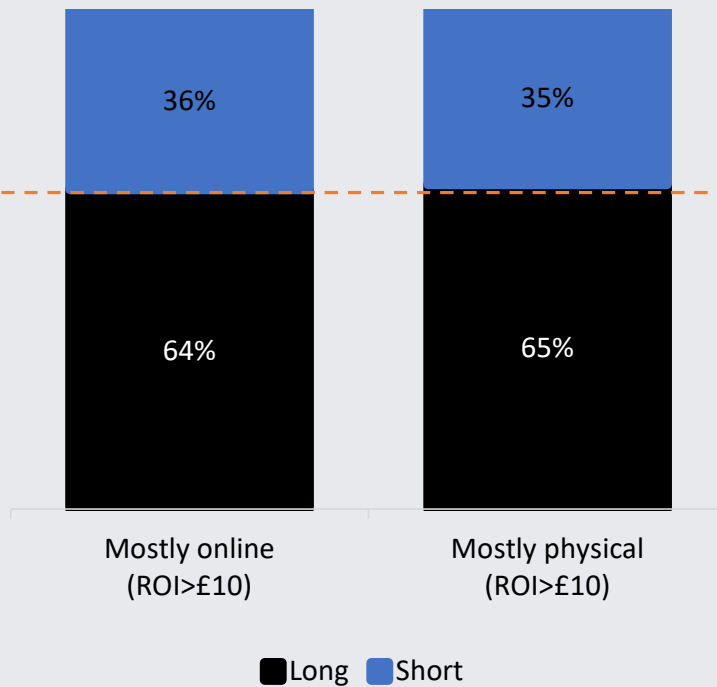
People are willing to pay more for products with a strong brand than those that haven't been marketed



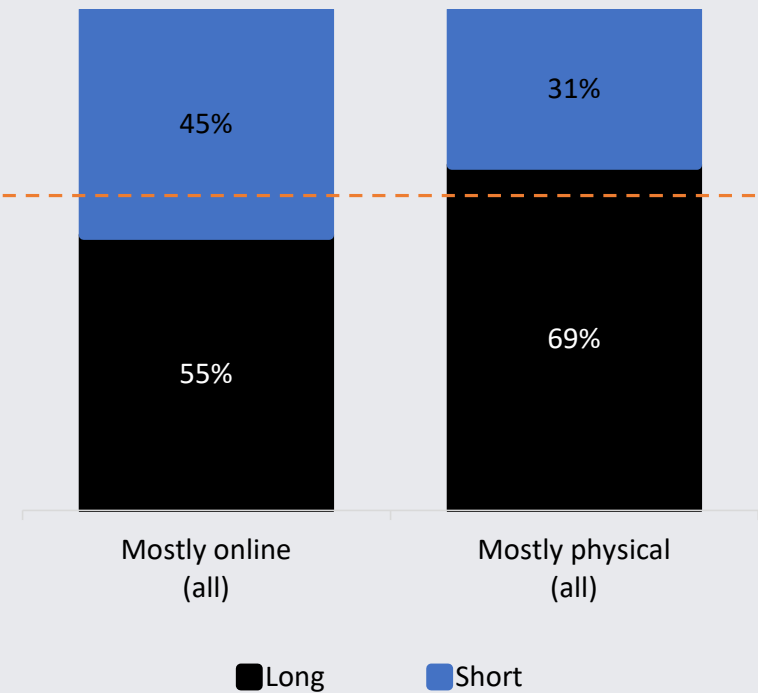
And with the right mix, comes the highest return on investment

Doing both means no leaks at the bottom of the funnel and plenty of demand being generated

Good value for money campaigns go 65% long regardless of sales mode



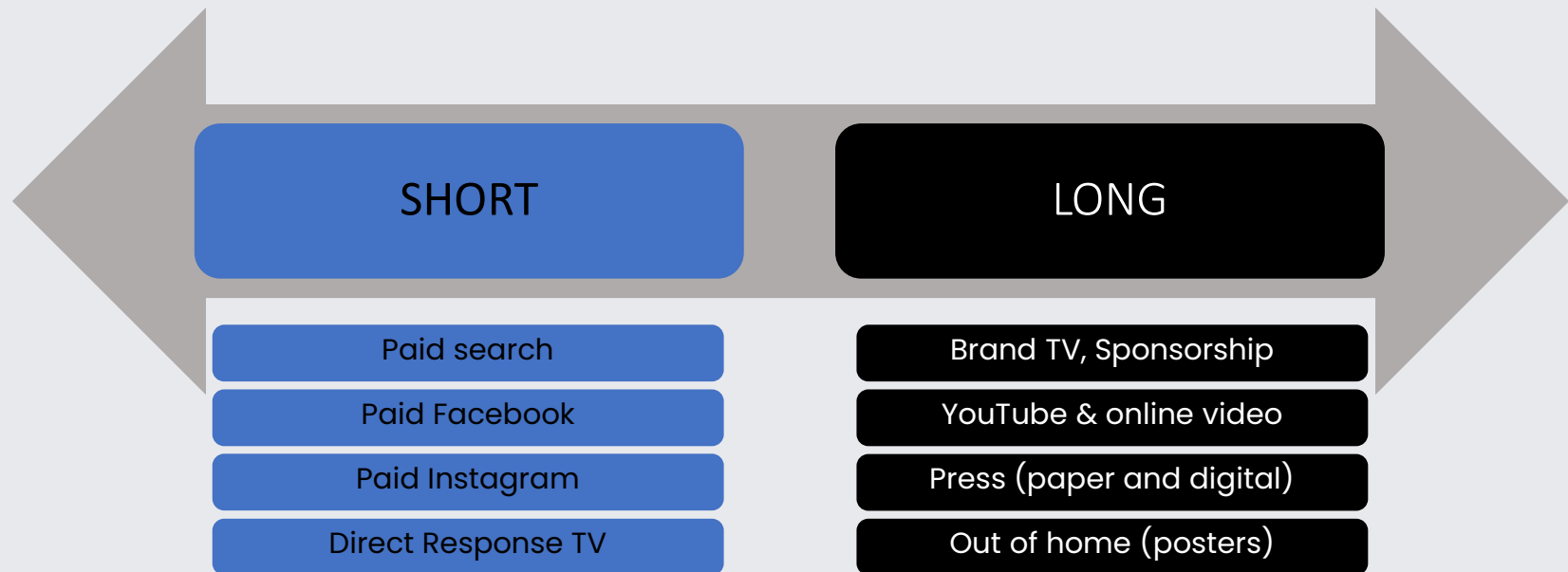
Bricks and mortar spend too much on long, online too much on short



Online is not the enemy

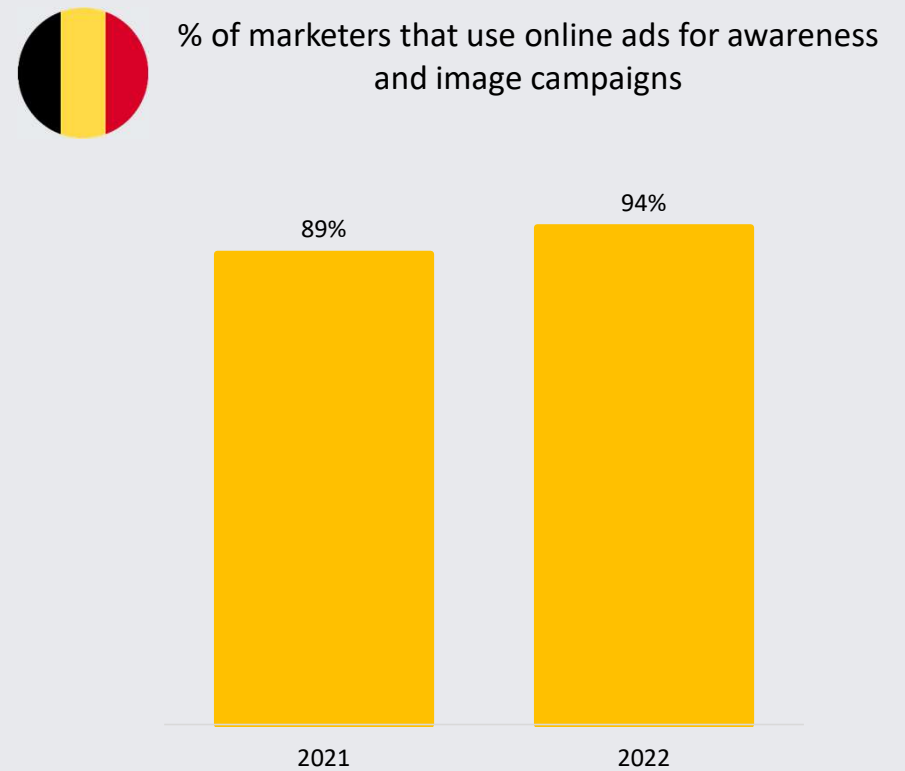
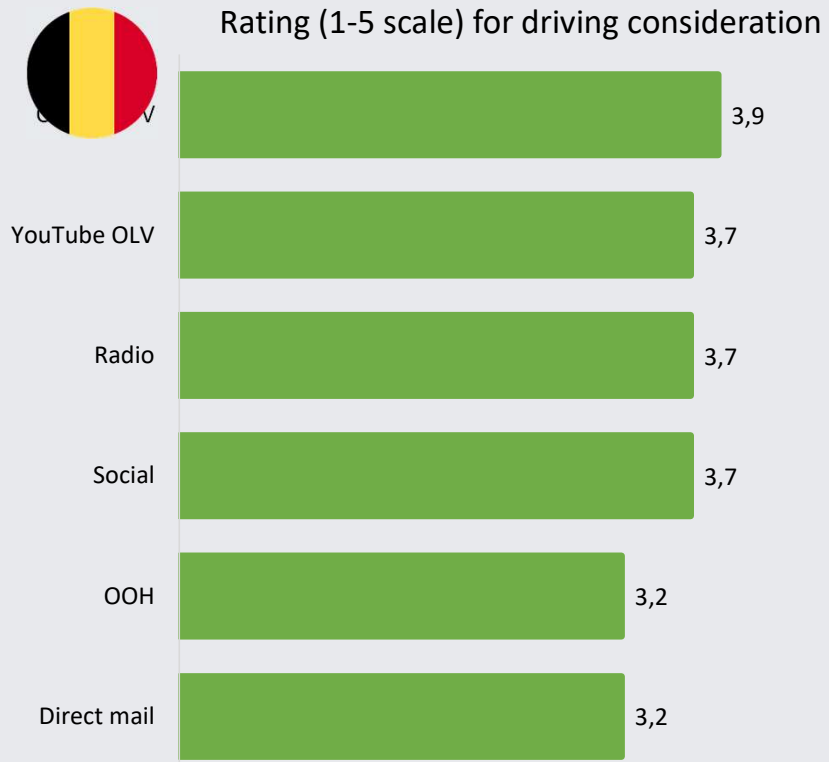
Online ads can produce both long and short-lived effects

Generic paid search is routinely the best at the short, and online video is 2nd only to brand building on TV



But you know this in Belgium

Your opinion and usage of channels is in line with emerging best practice



3 things to take back to your desk

To help you conquer 2024 whatever happens to prices

01:

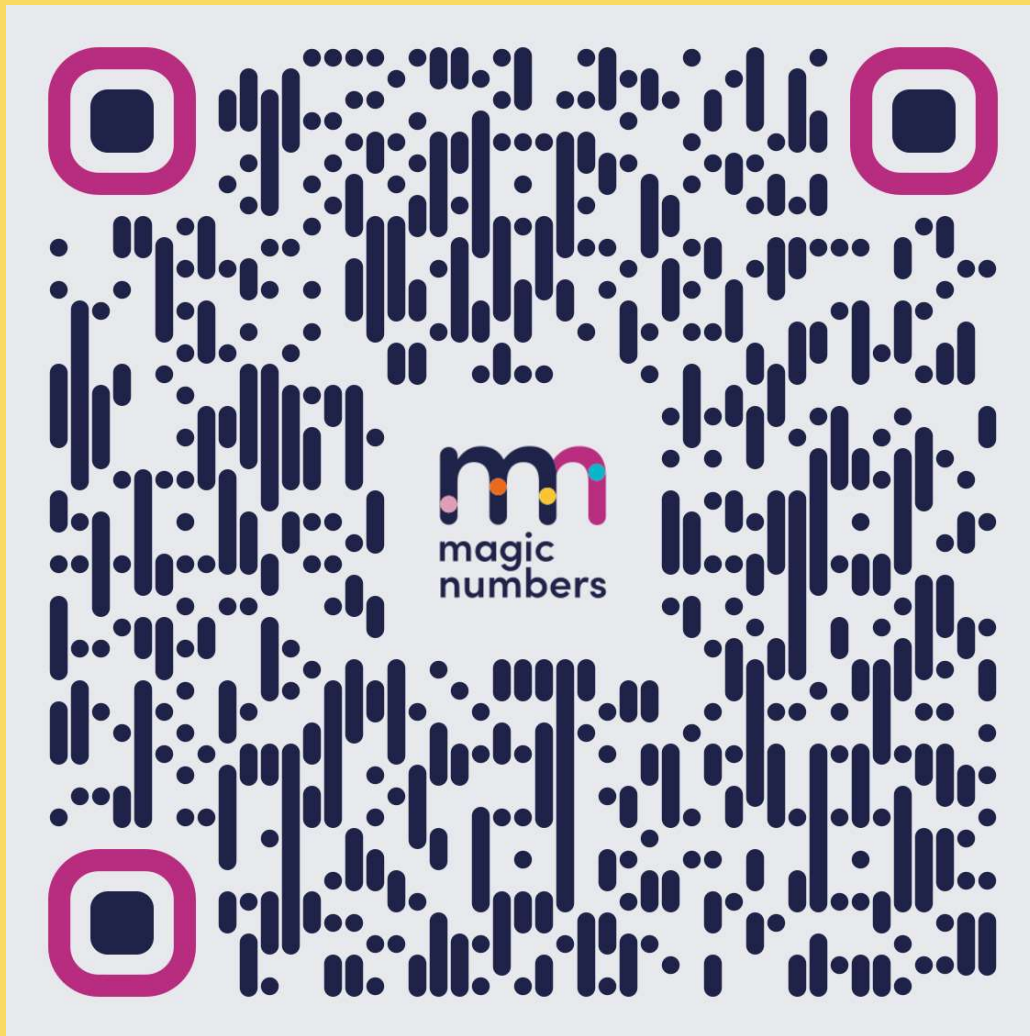
You can rely on bothism. If you get the right mix of long- and short you'll have strong ROI & be able to charge more

02:

Online options should appear in "the long" part of the budget, as well as the "the short" part

03:

You got this! Your beliefs ARE in line with best practice on how to use online channels (no matter what the nerds said)



magicnumbers.co.uk
or follow [Grace Kite](#)
on LinkedIn

Practical training and
people friendly analytics to
help marketers sell more
stuff



Attention & Efficiency; an advertisers' view

Bruno Liesse & José Fernández

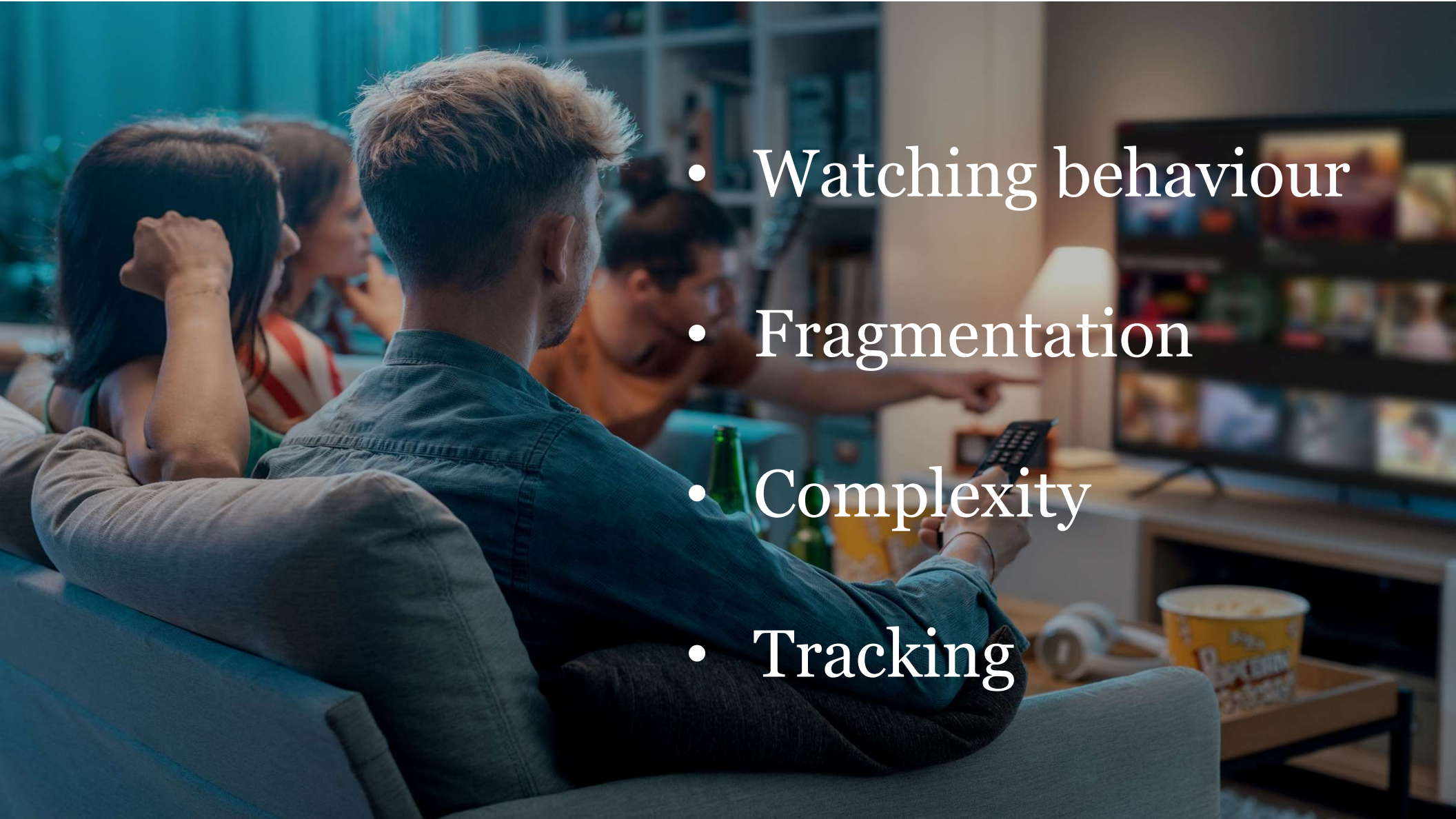




Attention & Efficiency (1)

UMA Mediadata 31 Aug 2023

José Fernandez – D'leteren



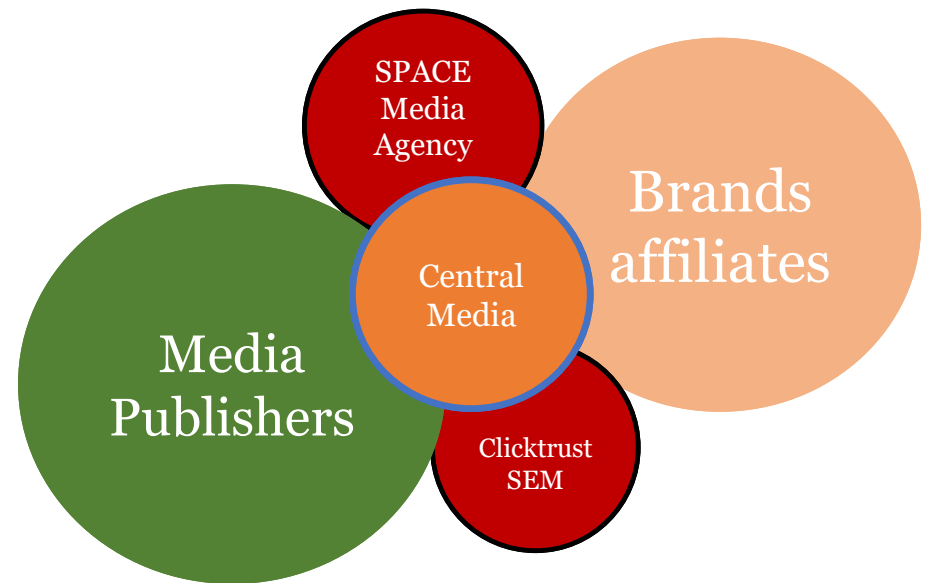
- Watching behaviour
- Fragmentation
- Complexity
- Tracking



D'leteren's media ecosystem

D'leteren Media Ecosystem

- ▶ Internal support for brands in challenging media agency outputs
- ▶ D'leteren group overview and supervision of all media activities
- ▶ Leverages on cross-brand expertise
- ▶ Hands on responsible on digital media planning, coordination, optimization and reporting of all digital media campaigns
- ▶ Lead in 360° brand campaigns coordination
- ▶ Leadership in all D'leteren key media decisions



Objectives of media agency ecosystem

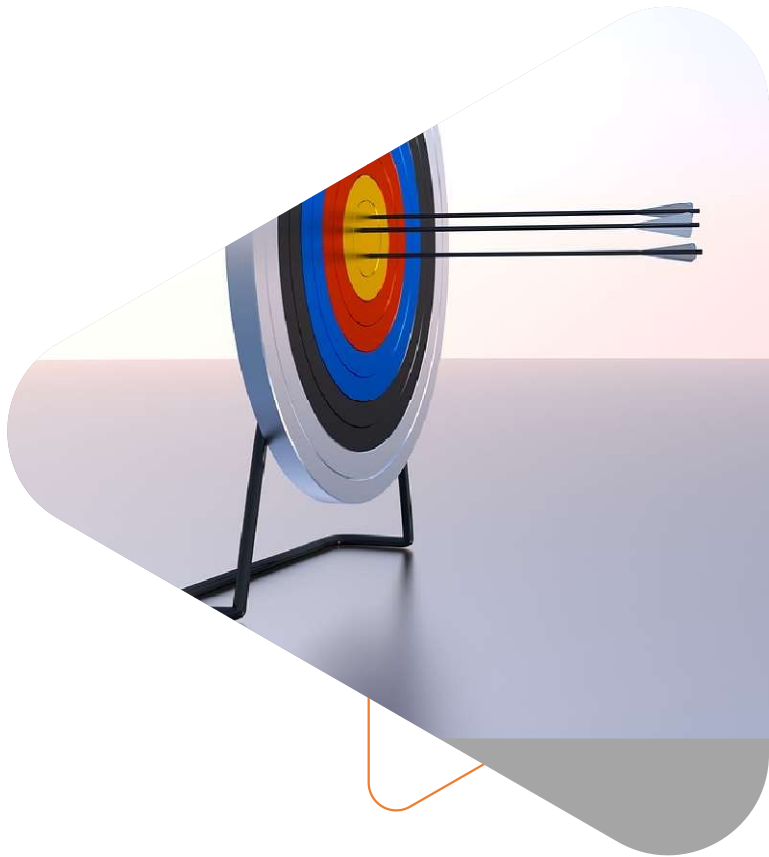
- ▶ Be more in **control of the total media process** from media choices and data management to media buying
- ▶ Achieve **better performances** on all digital campaigns by increasing speed, accountability and reactivity
- ▶ Monetize savings by paying correctly for the best services while ensuring best performing campaigns



What's essential for success of hybrid ecosystem?

- ▶ Attracting **talent** to develop internal **expertise**
- ▶ Dialogue advertiser-media agency, co-working and co-creation
- ▶ Going the extra-mile **together**
- ▶ Transparency and feedback culture
- ▶ Innovating by experimenting and test & learn approach

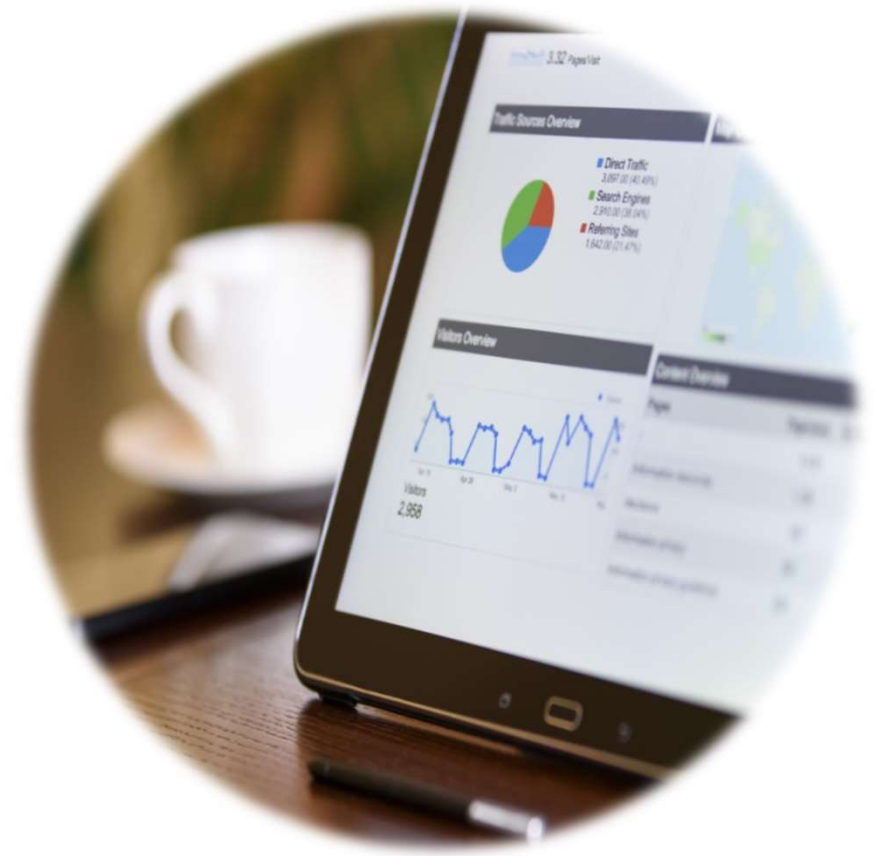




Effectiveness criteria

Effectiveness criteria

- ▶ Additional metric to investigate : Attention KPIs
- ▶ Adapt KPIs to funnel phase
- ▶ MMM : media mix modelling
- ▶ MSE : marketing spend effectiveness



Claimed use !

Indexes on survey-specific average attention levels

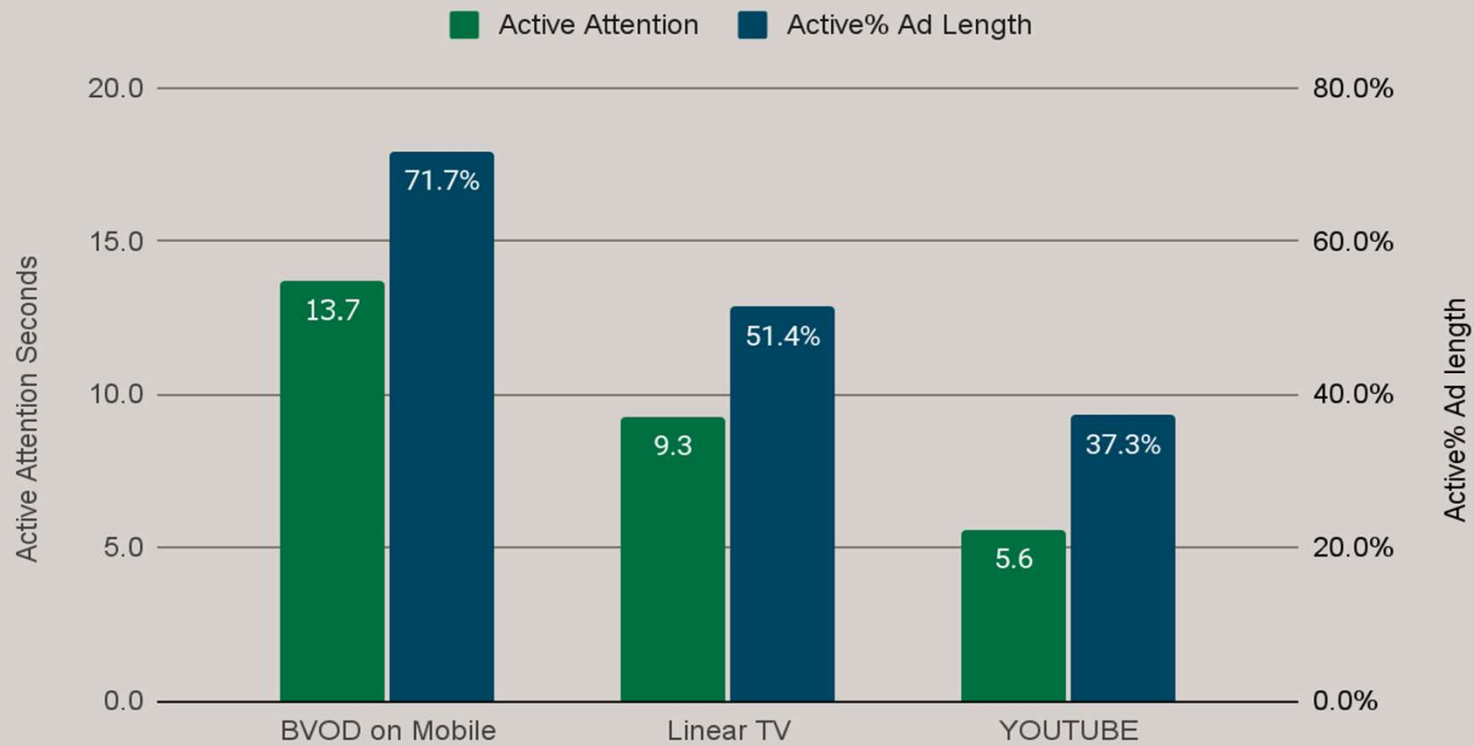


Media category	Alpha BE 2020	Magnetic 2018	Magnetic 2020	My Media 2018
Cinema	269	177		203
Printed magazine	145	155	153	147
Free press				143
Online magazine			140	
Printed newspaper	134	128	100	147
TV channels	113	93	131	128
BVOD	90		100	
Radio stations	96	75	96	108
Video platform	81		92	73
Social network	83	66	74	76
OOH	88	40		97
Websites	75		57	71
Digital display		66		
Online newsbrand	68		57	

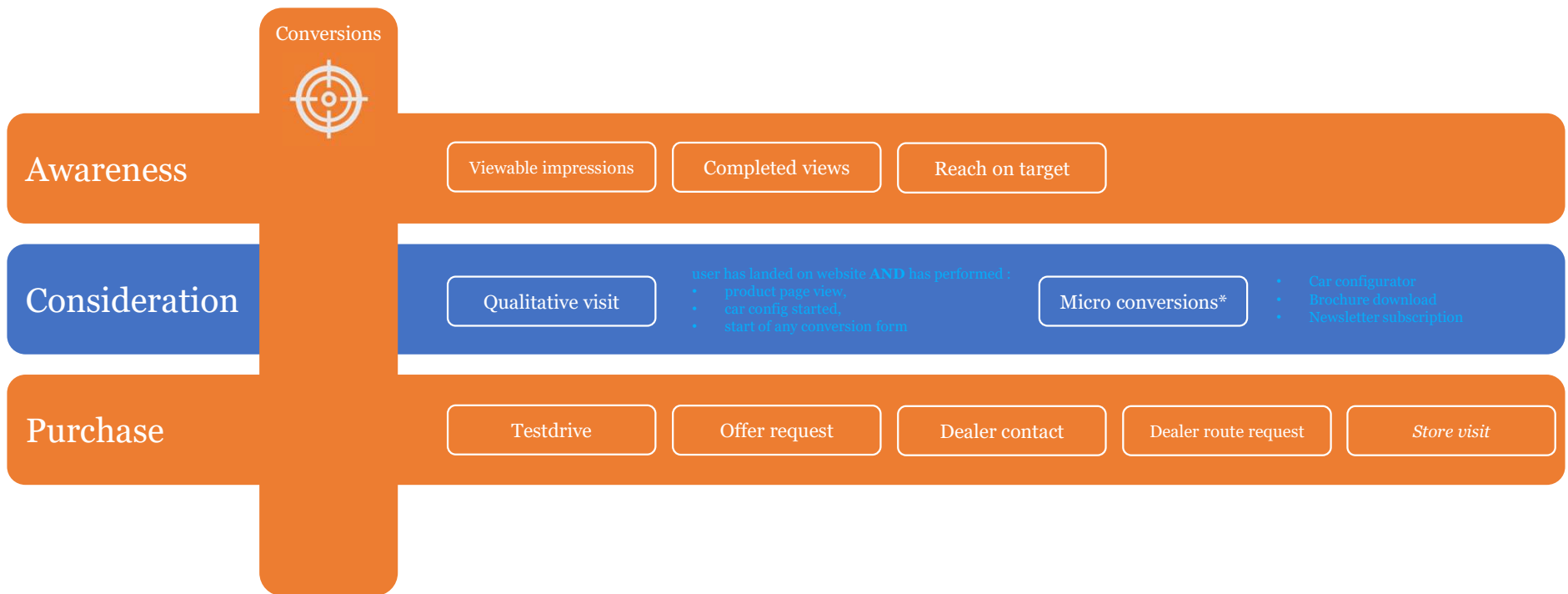


Linear TV, BVOD on mobile and YouTube on mobile

Active Attention by Platform



KPI's and conversions at D'leteren





Advertisers expectations for publishers

What do we expect from publishers

Local publishers have a major role for advertisers to develop proximity

- **Teams** : transparency and quick information
- **Customization** : adapting to local needs, testing and researching
- **Relevancy** : context is key for the future of efficient advertising
- **Brand Safety, Ad Fraud, Viewability**





Brand Safety & Suitability

D'leteren expects media partners to run campaigns in a brand safe & brand suitable environment.

Two exclusions are to be foreseen for all campaigns :

Categories exclusion

Keywords exclusion :

D'leteren owns and maintains a negative keyword list of +4000 & 200 keywords which will be communicated by our experts with every briefing. These lists should always be applied by media partners.

Brand Safety & Suitability



LE SOIR .be

Fil info Belgique Monde Services 22° -1.94%

Inondations meurtrières en Wallonie: le bilan s'alourdit une nouvelle

Abonnez-vous à 1€ pour 2 mois

Le fil info

Société 09:08
Selon les journaux Sudpresse du jour, 32 décès un en province de Luxembourg, deux en province de Charleroi.

ds De Standaard

Waarom sterven zoveel mensen in Italië?

1. LINTERLOG
2. THORST
3. Weersleu
4. Harde Vri
5. Europese

De oorsprong van ons vlees is perfect traceerbaar dankzij de ALDI Transparency Code

Waarom is kiezen voor vers vlees bij ALDI altijd slim?

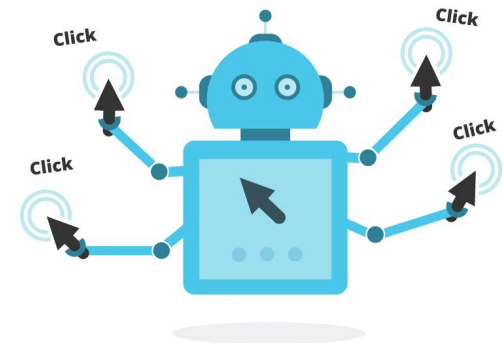
OORLOG OEKRAÏNE EN RUSLAND

LIVE. Internationaal Strafhof start onderzoek naar oorlogsmisdaden in Oekraïne - Lid waarnemingsmissie OVSE omgekomen in Charkiv

Adfraud

Media partners should provide by default strong native safety layers to ensure traffic is genuinely human.

- Ad Fraud is defined as any deliberate activity that prevents ads from being served to a human.
- This includes :
 - Invalid impressions - Fraudulent publishers use bot generated traffic to generate high volume of invisible impressions to increase their revenue.
 - Invalid clicks : Bots or low-wage workforce can produce fraudulent clicks to increase their profits generated by CPC ads.
 - Invalid leads :
 - Bots or low-wage workforce can generate fraudulent conversions filling forms or simulating other actions to get a share of CPL commissions.



D'Ieteren expects media partners to provide campaigns audiences and traffic with fraudulent/bot activity **below 1% threshold** of adfraud.

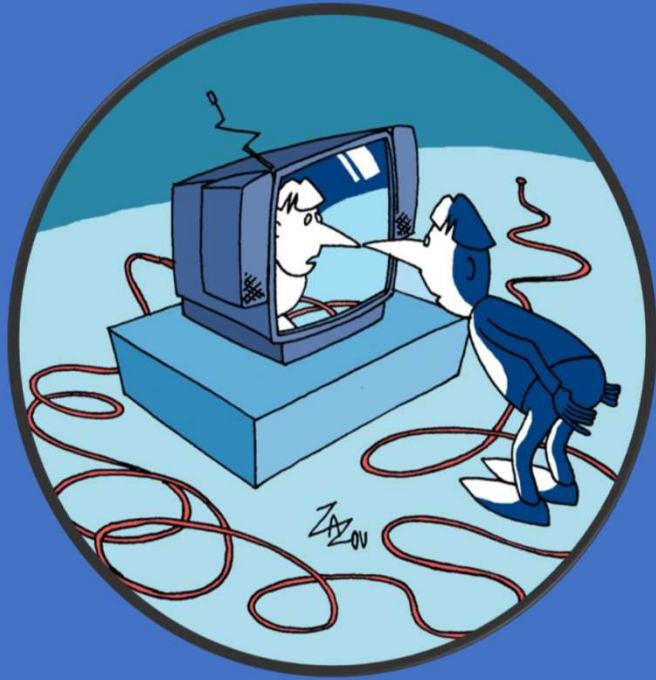
Viewability

What D'leteren is aiming for

D'leteren created its **own custom viewability metric**, and monitor, benchmark, optimize campaigns and media deals based on this new metrics: **Display: 100% viewed for 1 second** in any device verified by an independent tool

Video: 100% viewed for 3 seconds in any device verified by an independent tool

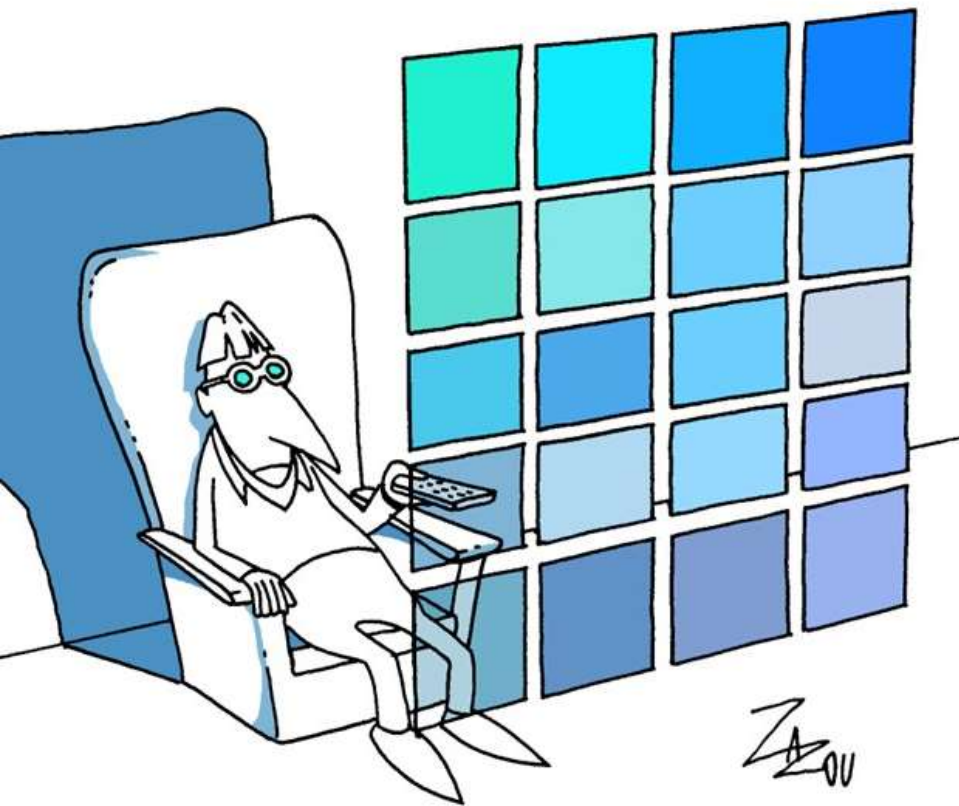




Attention & Efficiency (2)

UMA Mediadata 31 Aug 2023

Bruno Liesse – Polaris (Space)



- What does capture Attention
- What Attention results in

8 insights to make progress

Behind attention : Emotions

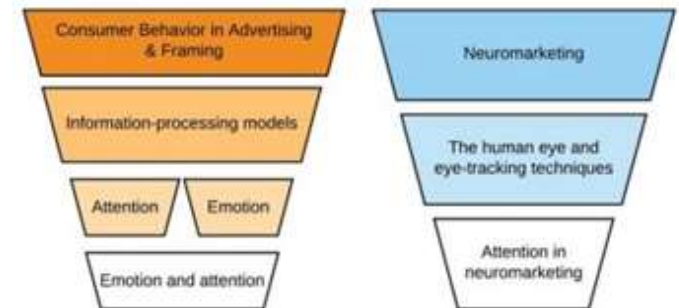
Emotion and Attention, the new binomial formula

*“A key neuromarketing variable, which has been extensively studied in the last two decades, is emotion. An **autonomous and unconscious responses to environmental stimuli**, which can be manifested in terms of internal reactions”* (Hansen & Christensen, 2007)

Researchers have tried to establish a **connection between emotion and attention**, in terms of the effect that emotion has on individuals’ visual attention when exposed to ads.

It suggests that emotional stimuli are **more effective in attracting visual attention** and that they have a **privileged route in terms of information processing** vs neutral stimuli (Genco, Pohlmann & Steidl, 2013; Vuilleumier, 2005)

Insight 1
Emotions play on attention and we can not resist



Do consumers pay attention to emotions? Thesis from Nicholas Batista & Michele Lioy, Copenhagen Business School (Sept 19)

Behind attention : Emotions

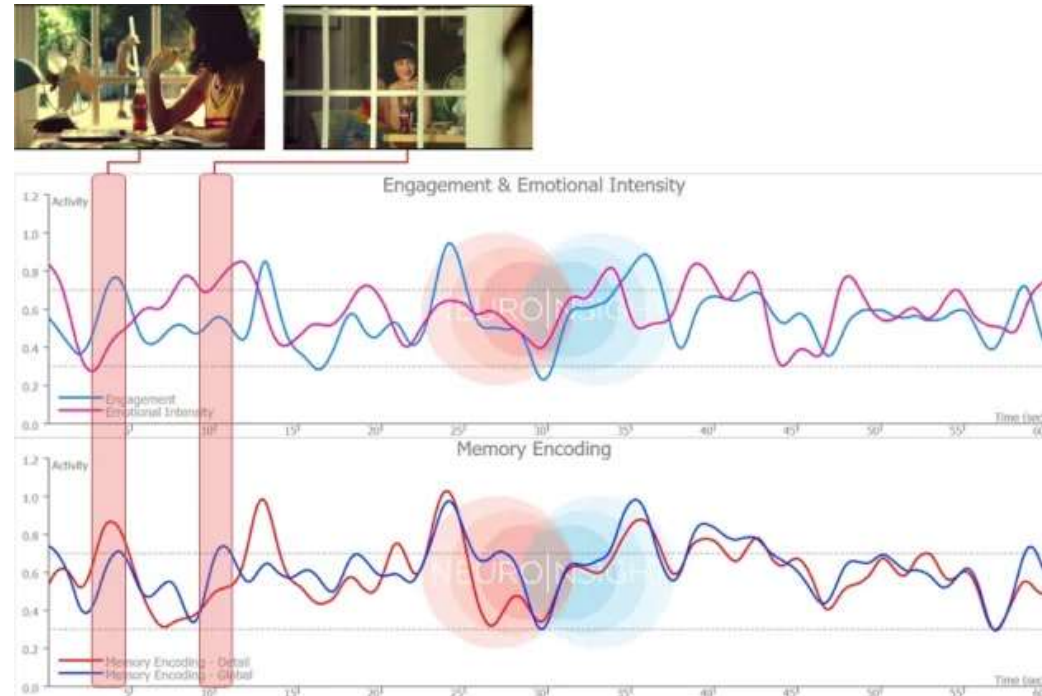
Emotional reactivity measured

- Neuromarketing & passive methods **mandatory**
- The correlation between Emotion grade and memorization coding is **established**
- The highest, the better

Emotions mean attention, means memo.

Insight 2
High emotionality forces memory coding

Front. Psychol., 20 April 2017



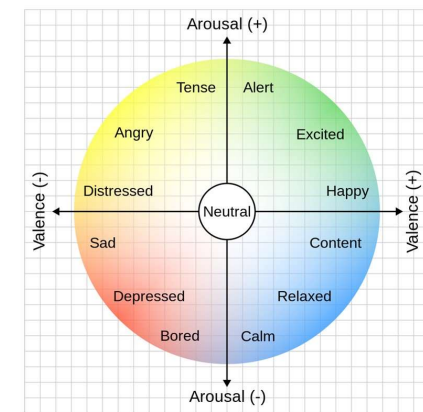
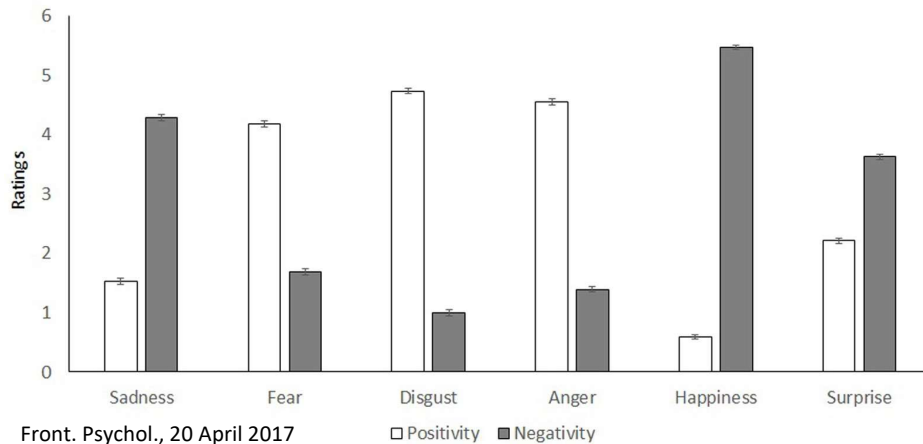
<https://www.youtube.com/watch?v=NYkSfBQ0VdA>

Coca-Cola @ Lions 22

Behind attention : Emotions

The intensity is key, not the positivity

- E.g. : Happiness and sadness generate (nearly) **equal responses**
- Science and literature are **mature** in that field
- So are some **algos'** and some **creatives**

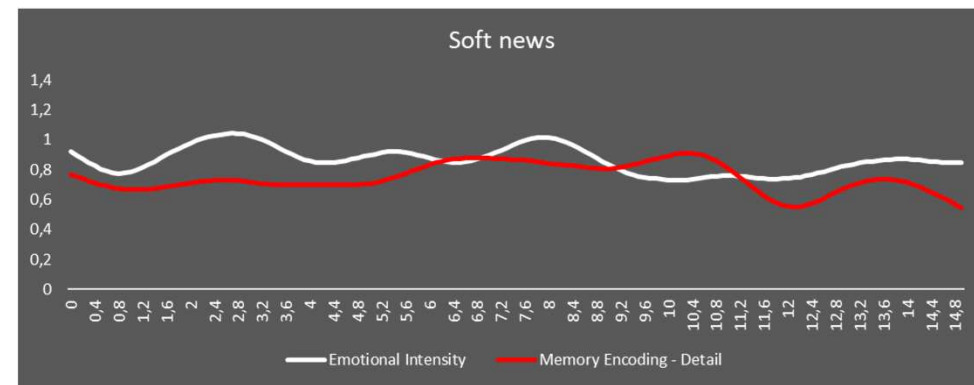
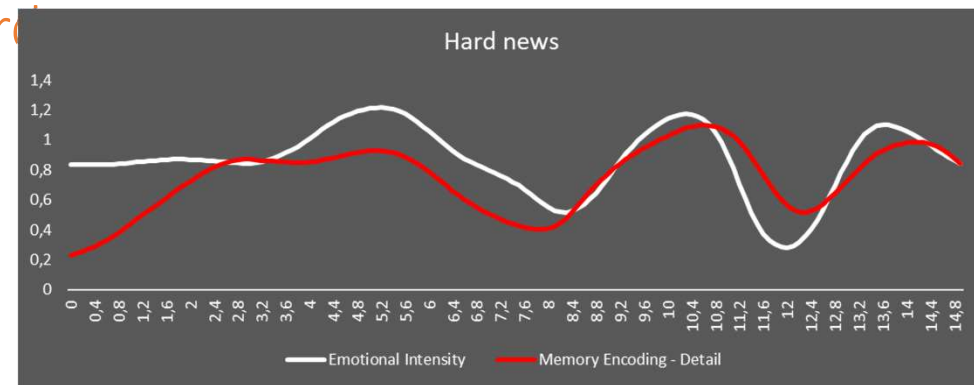


Insight 3
The portfolio of efficient emotions on attention is well known, and casually properly used.

Behind attention : Emotions

Editorial context more engaging when hard

- Because more engaging at the source
- The emotional intensity is different between Ads, consequently understood as fake for a bit
- And News / Editorials, closer to individuals reality and taken seriously



Source: Neuro-Insight brain response data

Insight 4
We are more responsive to Hard news, which impacts on memo

Behind attention : Emotions

Editorial context more engaging when ha



The types of potential avoidance categories as listed by the IAB:

1. Adult Content
2. Facilitation of Illegal Activities
3. Controversial Subjects (Occult, Taboos, Unusual Lifestyles, etc.)
4. Copyright Infringement
5. Drugs/Alcohol/Controlled Substances
6. Extreme Graphic/Explicit Violence
7. Incentivized Manipulation of Measurements
8. Hate/Profanity
9. Nuisance/Spyware/Malware/Warez
10. Political/Religion bad content treatment
11. Unmoderated User Generated Content

BUT

Nothing listed in the Brand Safety corridor speaks about news as treated by publishers

From views to impact

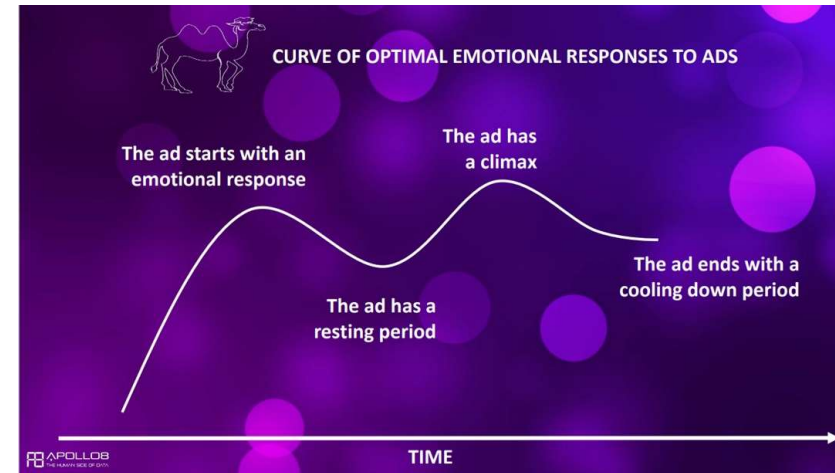
Global experts are aligned

- Standard currencies are about **Opportunities To See** (Read, Hear)
- The attention grade will **under- or over-weight** the value of the contact
- The current **Viewability** topic remains about **technical readability** – length x proportion
- Attention & Engagement are about **cognitive response and mental coding**

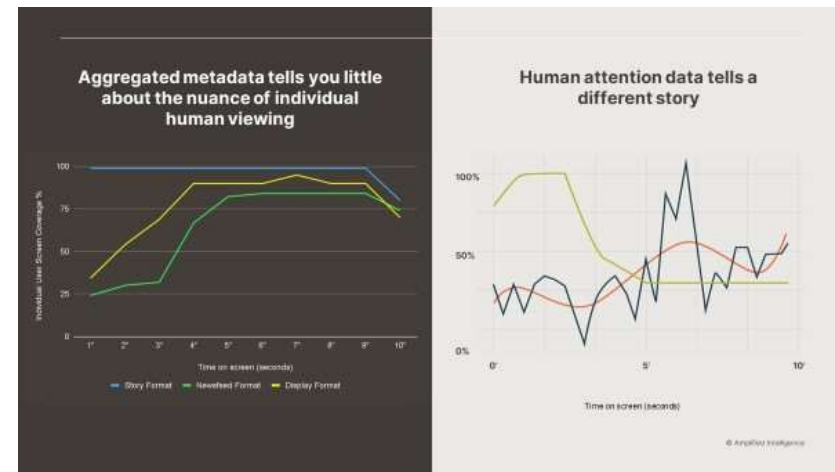
Insight 5
Standard Currencies GRPs & Views values are corrected by the contact quality & human factor

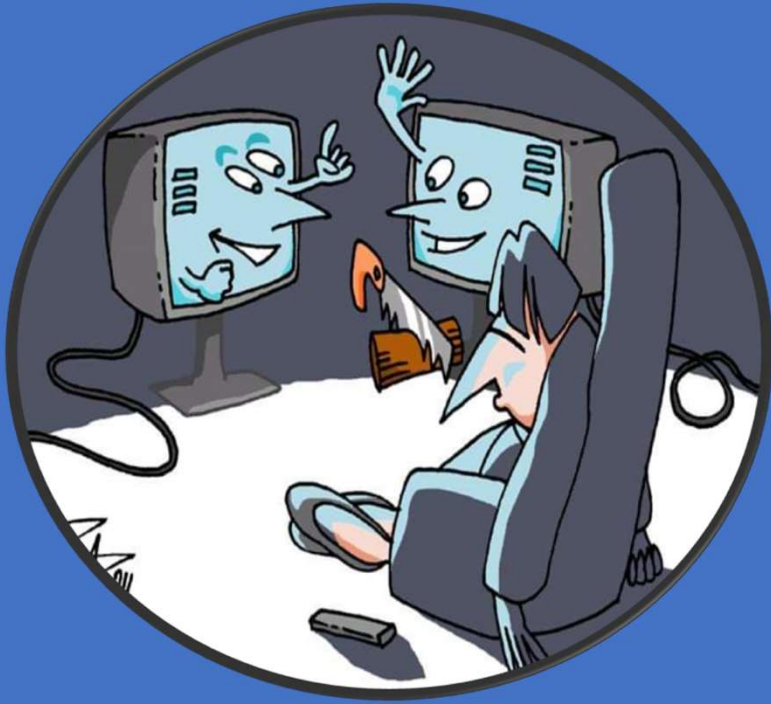


Jelle Demanet, Innovation/Neuroscience/XR Ghent University (2023 for Brighfish)



Karen Nelson Field, Amplified Intelligence (2022 for VIA)





So WHAT?

We target a high, positive and right memo of our messages.

The issue is we lose X% of memo,
and Y% of brand attribution

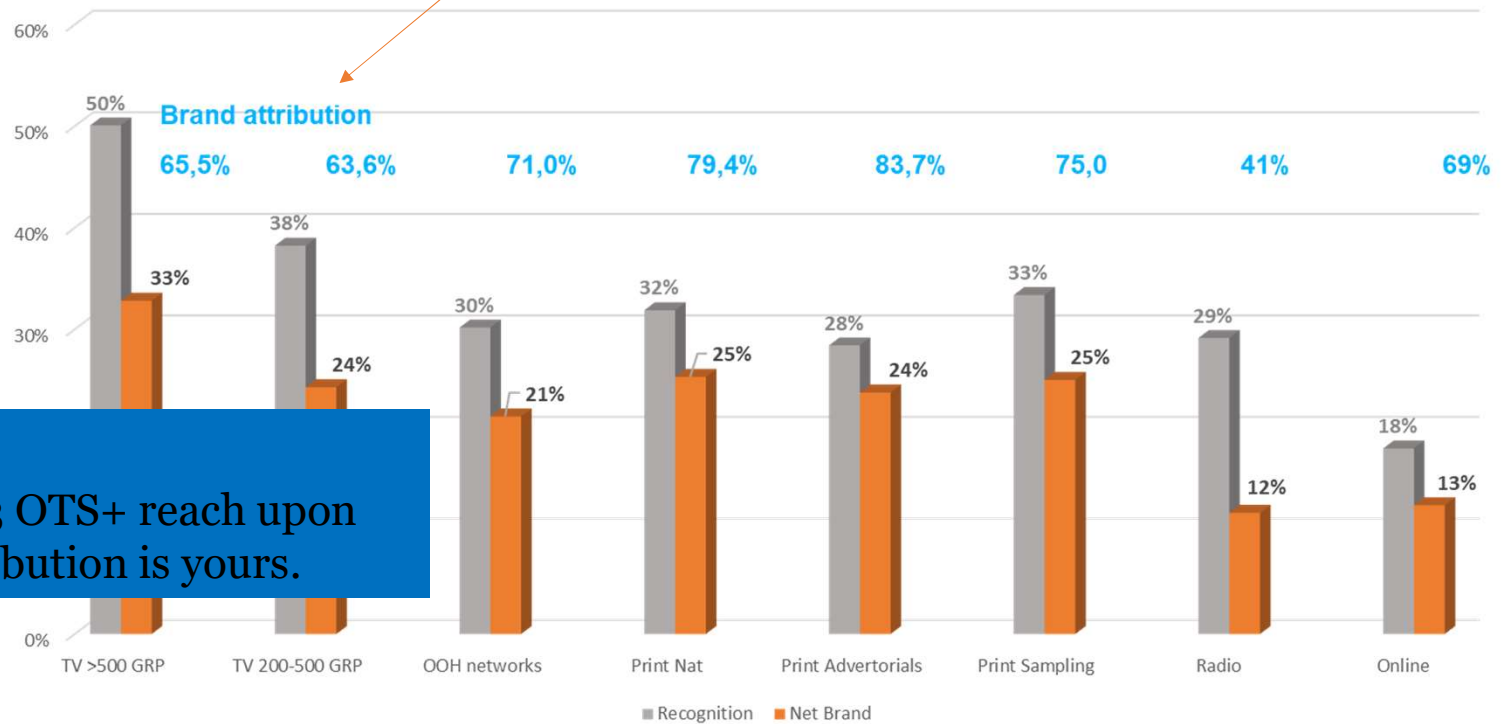
Both from 80% down to **ZERO**

After attention : Recall & Attribution

Memo & attribution benchmarks

Upon MIP/DPG, average memo is 50% and attribution 54%, meaning a net score of 27%

- 2015-2019
- More than 3.900 cases



Insight 6
Gross TV memo is around 3 OTS+ reach upon standard currency, but attribution is yours.

Source AQ Rate – Polaris, 2023

After attention : Recall & Attribution

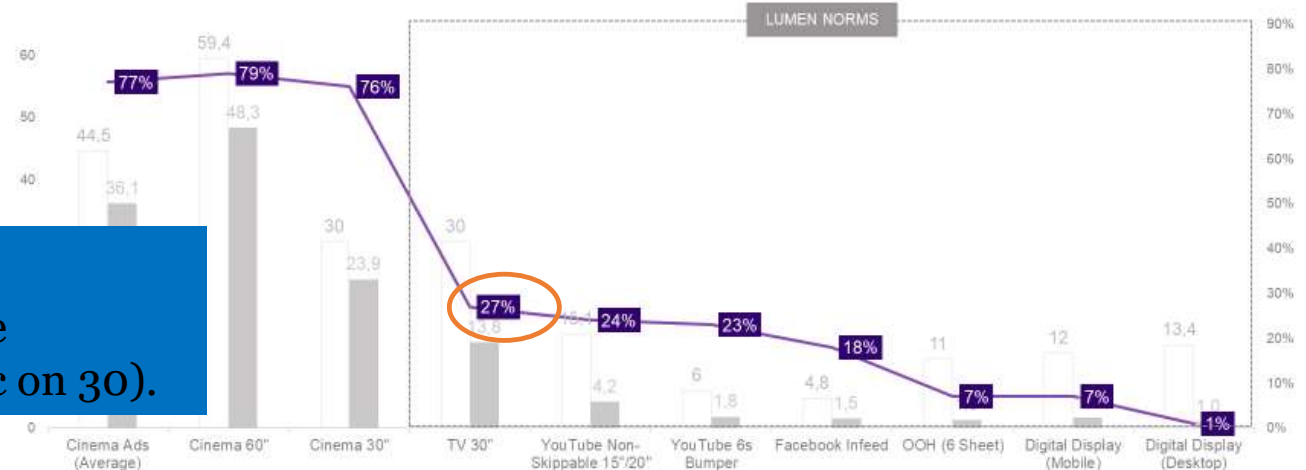
Memo & attribution benchmarks

Upon MIP/DPG, average memo is 50% and attribution 54%, meaning a net score of 27%

CINEMA ADVERTISING SIGNIFICANTLY OUT-PERFORMS OTHER MEDIA

Cinema generates up to 77x more share of viewing time than display, 11x more than OOH, 4x more than Facebook, 3x YouTube and TV.

% viewable time spent viewing



digital cinema media LUMEN

Source: Lumen Attention Research Project April 2022 / Onscreen Ad Impressions: Cinema Ads = 1,347 | Norms Source: TV data = Tvision / YouTube, Facebook, OOH, Display data = Lumen Research

Insight 6
Upon Lumen norms, 58% of TV ads are effectively seen, the half of them (14 sec on 30).

After attention : Recall & Attribution

Where remains my brand ?

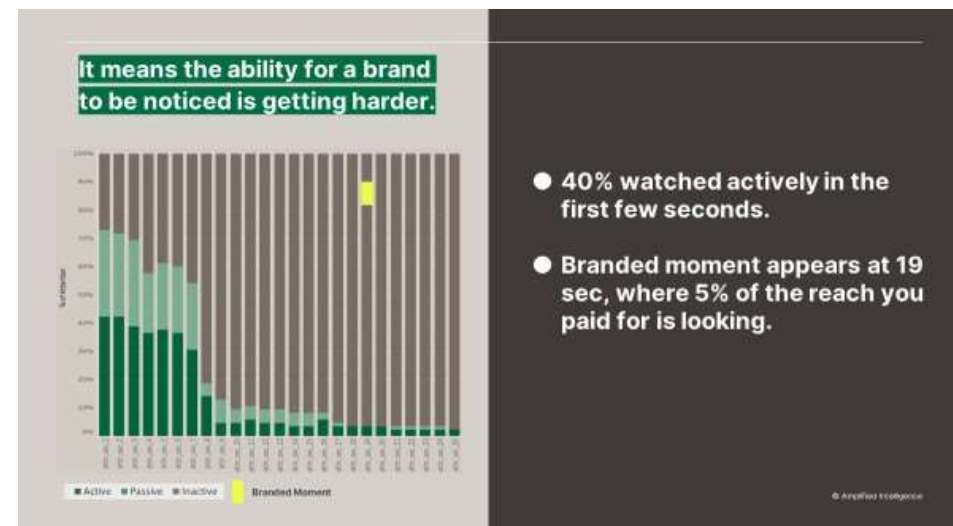
- A huge proportion of ads recall show an **attribution deficit**
- Whatever the channel,
you can lose from 45 up to 90% of your contacts

Some technical advices ?

1. Make your brand **omnipresent** (whatever your creative says ☺)
2. (Linear) Bring your brand **upfront** / same
3. Put an **advantage** and a **CTA** even if it as about 'Image'
4. Care about the **format size / length** – it does matter
5. Care about ad context **cluttering** (*Prime time* is irrelevant)
6. **Activity capitalization** is the golden rule

Insight 7

To recall an ad without (right) brand is no goal



Karen Nelson Field, Amplified Intelligence (2022 for VIA)

After attention : Recall & Attribution

- Ad memo and evaluation are correlated with...

- 1) The strength of the **brand** itself
- 2) The product category **involvement**
- 3) The efficiency of the **previous** campaigns
- 4) The **message** engagement = relative to attention and emotion
- 5) **Context** influences
- 6) Quantity & "**quality**" of the contact measured (viewability)

Brand history

Channel & ad influence

Half of standard currencies are currently traced and based on probable contacts

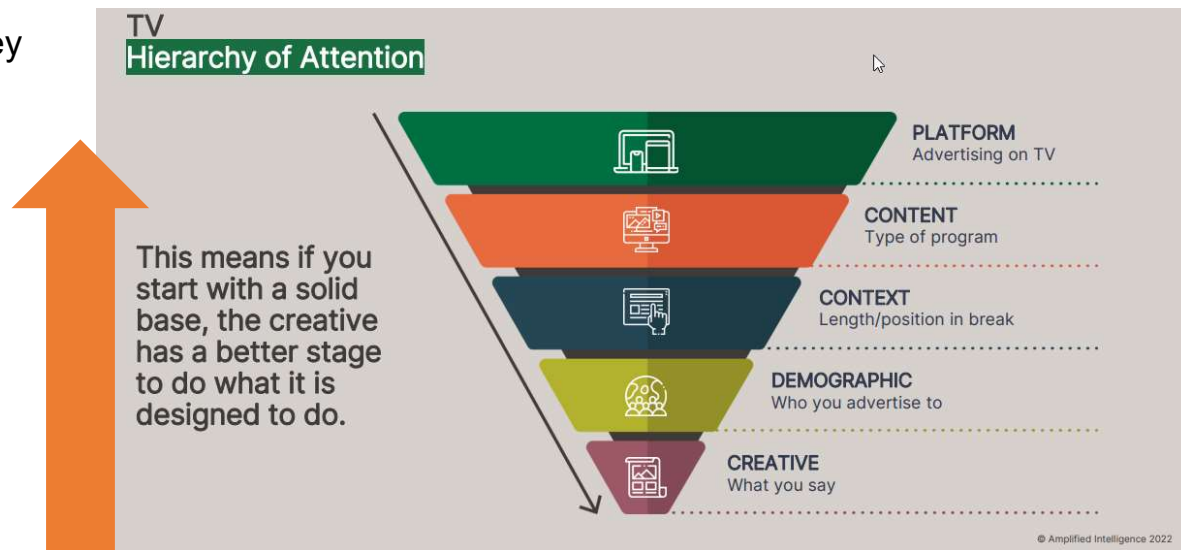
Insight 8

Positive ad memo coding is multifactorial (and chaotic)

Different conclusion

Sorry Karen, but it also works bottom up

- Your **message**, promising and branded, remains key
- To reach people **in market** is essential
- Message **format** and **context** influence impact
- Platform is the parameter where you **get a bonus**



Karen Nelson Field, Amplified Intelligence (2022 for VIA)



Marketing Effectiveness

Mark Ritson



The Other
92%
of Effectiveness





The future of advertising the Belgian Case

Vincent Fosty



Deloitte.

WHAT FUTURE FOR THE BELGIAN ADVERTISING ECOSYSTEM ?

Vincent Fosty, Strategy Partner, Media & Entertainment

August 31st 2023

AL



EATS BRAINS!
WRITERS GUILD
ON
STRIKE!



CARPENTER



Et ça,
il sait le faire
ChatGPT ?



Restons
naturels.



Fermiers de Loué - 72550 Oulmes-sur-Orne

94.5

% penetration of internet access

3.8

bio € of gross ad spend in 2022

36

% television share of net ad spend

35

% digital share of ad spend

78

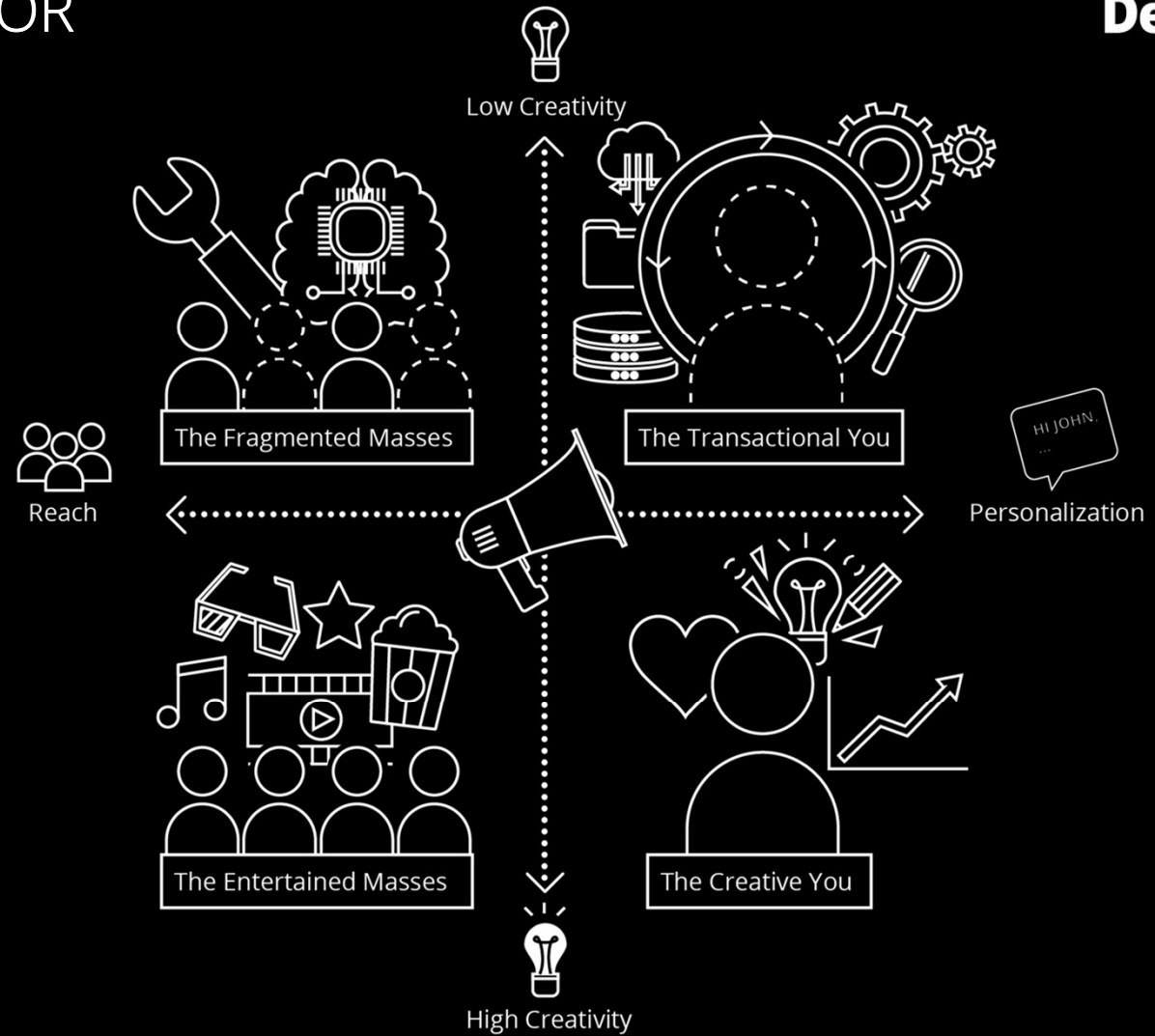
€ digital spend per capita

62

% of which spent with global platforms

FOUR SCENARIOS FOR THE FUTURE OF ADVERTISING

Deloitte.





AUDIENCES

An aerial photograph of a fragmented island landscape. The islands are small, irregularly shaped, and covered in green vegetation. They are surrounded by shallow turquoise water, which transitions to a deeper blue as it extends into the distance. The overall scene conveys a sense of isolation and fragmentation.

“The pandemic acted as an accelerator of the fragmentation. All generations are now digitally connected and our younger ones demand more in person connections, probably in reaction to forced isolation (...)”

DATA



*"Two years ago, I was banging my head
convincing peers of the value of data. Now I
can't stop people from using Chat GPT."*

DATA



- Higher ad yield through targeted audience creation
- Real-time advertising campaign management
- Higher subscriber conversion
- Higher user and audience engagement through personalization

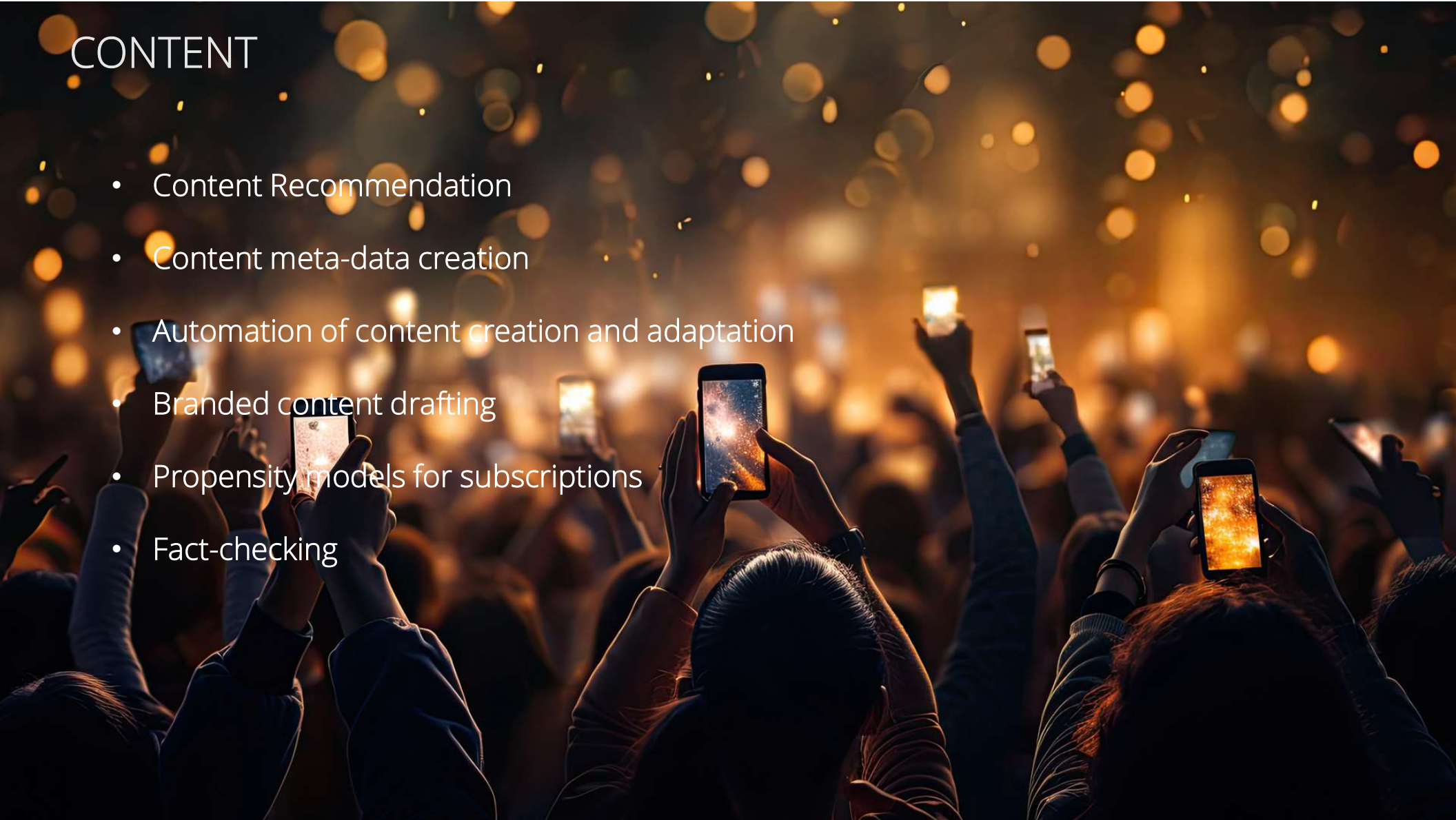
CONTENT

A large crowd of people is shown from behind, holding up their smartphones. The scene is illuminated by warm, golden bokeh lights, creating a festive and social atmosphere. The phones are held high, and their screens are lit up, some showing bright, abstract patterns. The background is dark, making the lights and the glow of the phones stand out.

“Live & premium content will become more important as it allows for diverse gathering of people & creates emotions that audiences associate with your brand”

CONTENT

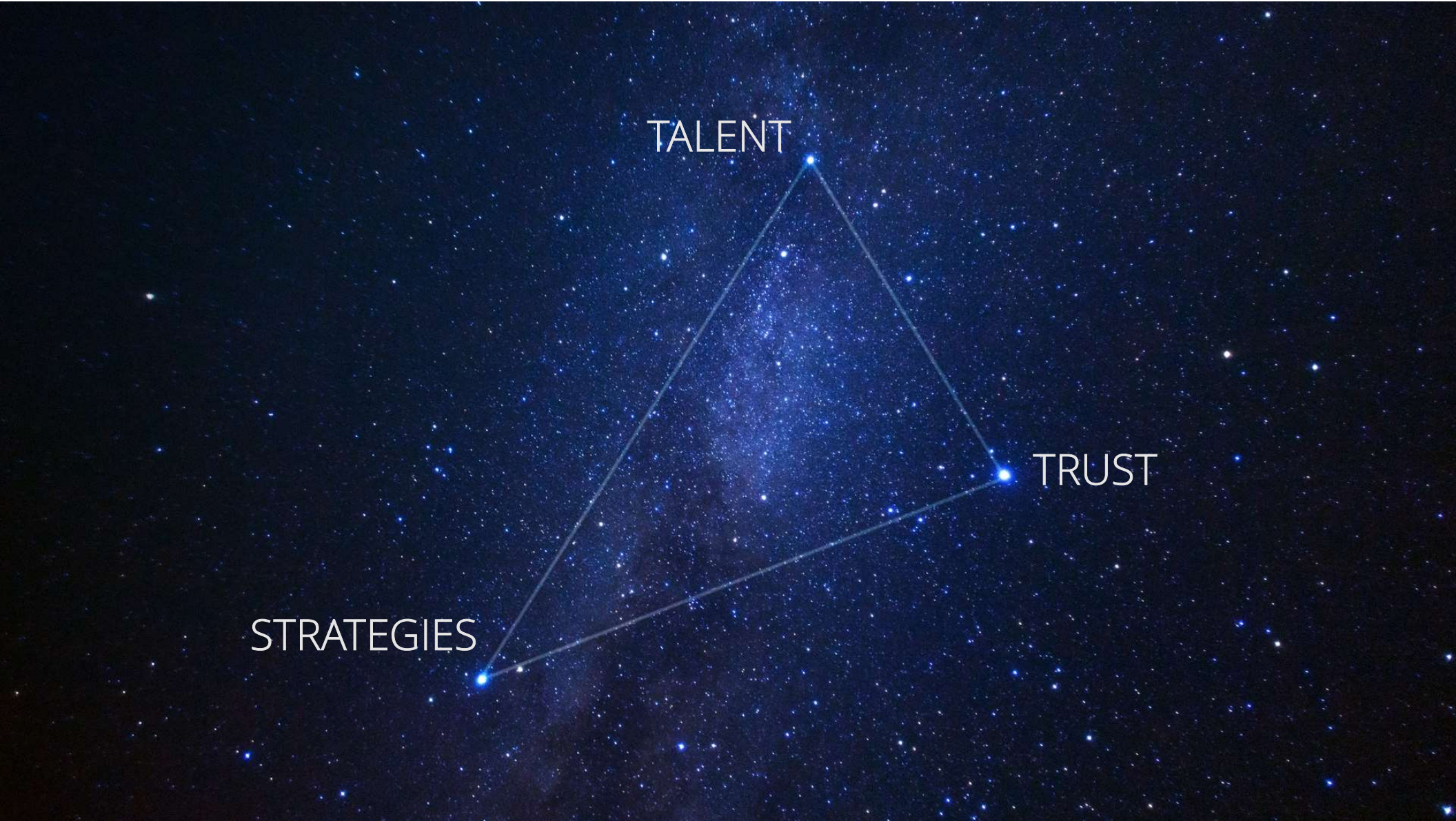
- Content Recommendation
- Content meta-data creation
- Automation of content creation and adaptation
- Branded content drafting
- Propensity models for subscriptions
- Fact-checking



TALENT

TRUST

STRATEGIES



Deloitte.

WHAT FUTURE FOR THE BELGIAN ADVERTISING ECOSYSTEM ?

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G E T T O G E T H E R