

## Webvertising Where surfers & advertisers meet

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Research & Online manager – MPG Belgium

# Summary

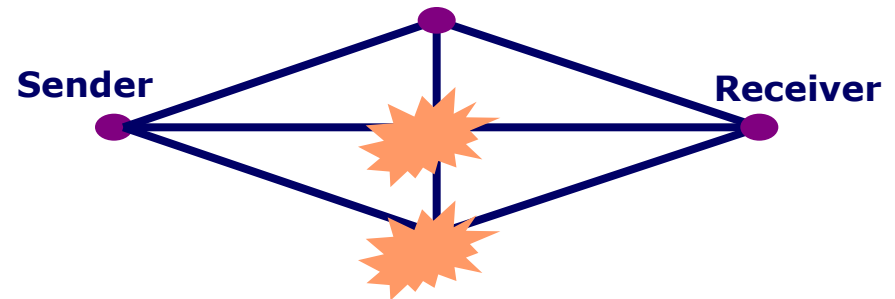
- Brief internet history
- Audience measurement
- Penetration of Internet
- Surfers' profile
- Advertising investments
- Perception of online advertising by planners & advertisers
- Last commercial trends
- Discussion

# MPG

## 1. Brief Internet History

# Military birth

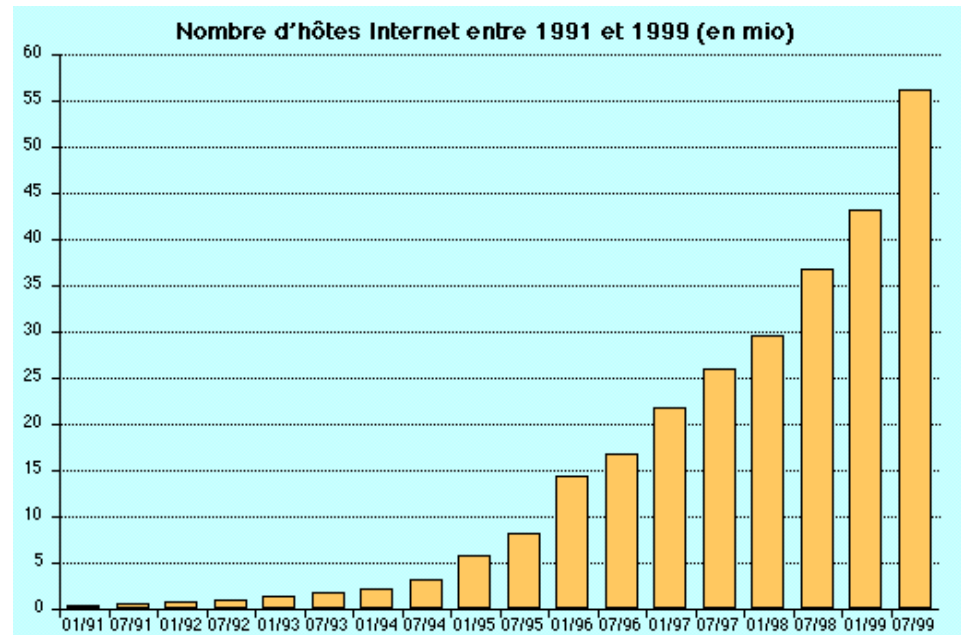
- 1967 : ARPA\* develops the ability to exchange information in case of nuclear attack (\*Advanced Research Project Agency)
  - ▶ the Web approach



- 1972 : ARPAnet presentation
  - ▶ National Science Foundation network (InterNetworking between universities)
- 1986 : 5 089 computer are connected to Internet ; -)
- 1990 : the CERN\* implements the World Wide Web to share information among research centers around the world (\*Comité Européen de Recherche Nucléaire)

# Exponential developpement

- 1990 : 1<sup>st</sup> classification & access to internet sites (Archie)
- 1991 : implementation of the Hypertext with the 1<sup>st</sup> browser (Gopher)
- 1993 : free release of Mosaic
- 1994 : Netscape
- 1995 : 1<sup>st</sup> portal (Yahoo)
- 1996 : Internet Explorer
- 1999 : more than 55 million computers are on the web
- 2002 : 31 million of Domain Names are registered, 544 millions surfers



## 2. Audience measurement

# Audience measurement

- **User centric : the surfer answers questionnaires**
  - ▶ Allows audience profile (demographics...)
  - ▶ Interviews (online, phone, face to face) & panels
  - ▶ Eg. Nielsen e-rating (panel), NetObserver
- **Site centric : quantitative measure of traffic**
  - ▶ Takes into account all surfers coming to a site (national or international traffic)
  - ▶ Counts computers, not surfers
  - ▶ Cookie based or log file analysis
  - ▶ Eg. Mediametrie (France), Metriweb (Belgium), Webtrends, ad servers...

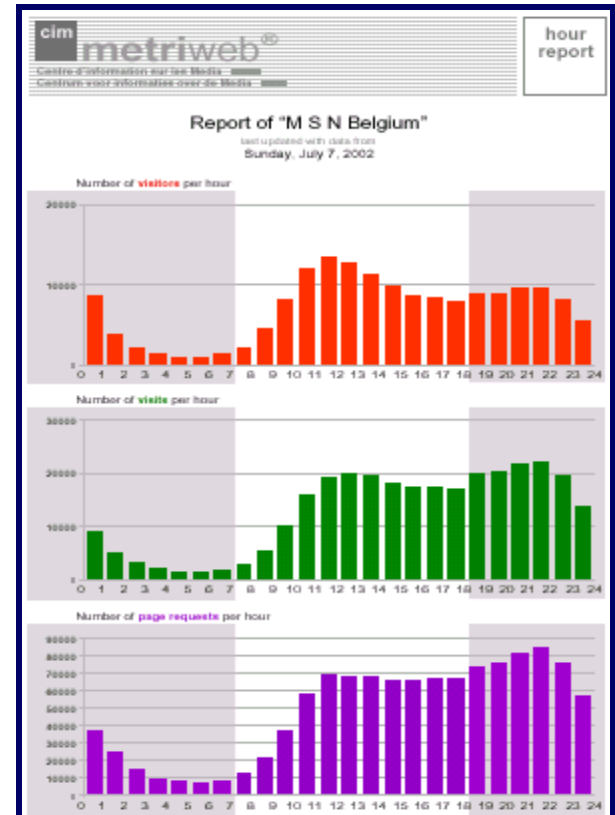
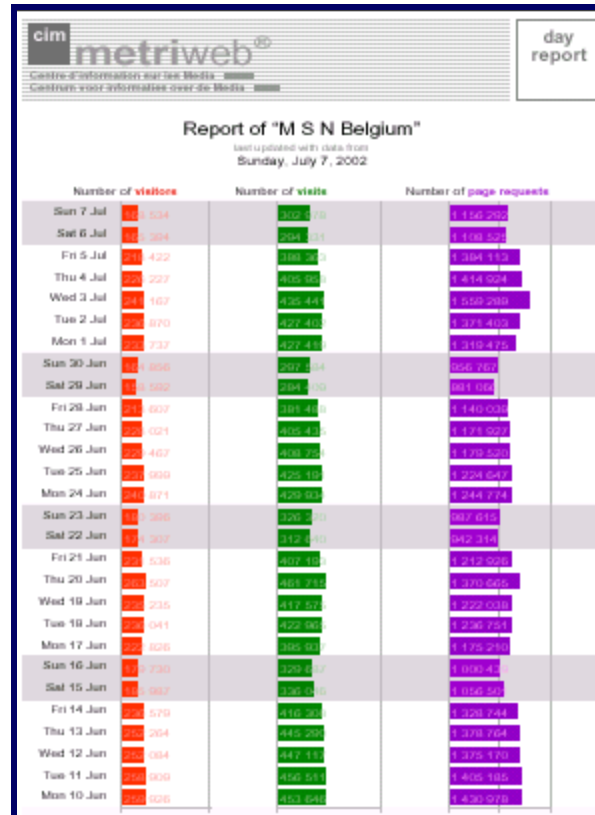
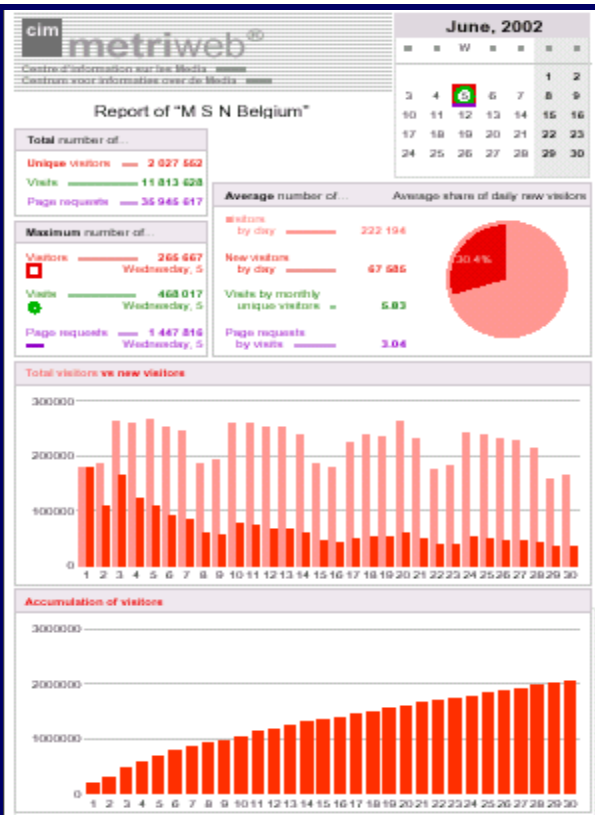
# Main studies user centric studies in Belgium

- **CIM**
  - ▶ PluriMediaProduct : Surfers' profile & Internet penetration  
Media Consumption – Including Internet  
+ product consumption  
>10 000 Interviews / yearly publication
- **INRA**
  - ▶ NetSurf : Surfers' profile & Internet penetration  
> 2000 Interviews / publication twice a year
- **Insites**
  - ▶ Belgian Internet Mapping (BIM) : surfers, shoppers, sites' audience profile
  - ▶ 58 000 online questionnaires + 2000 phone interviews / publication twice a year
- **Novatris**
  - ▶ Sites' audience profile (belgian surfers only)
  - ▶ 71 770 interviews, publication twice a year
- **Nielsen e-ratings**
  - ▶ Netrating : sites' audience profile, surfer's behavior
  - ▶ Panel of home surfers (sample => extrapolation)

# Main site centric measures in Belgium

## ■ Metriweb : belgian sites audience measurement

- ▶ Counts visitors, visits, impressions of subscribing sites
- ▶ 106 sites in July 2002
- ▶ Daily publication, online access



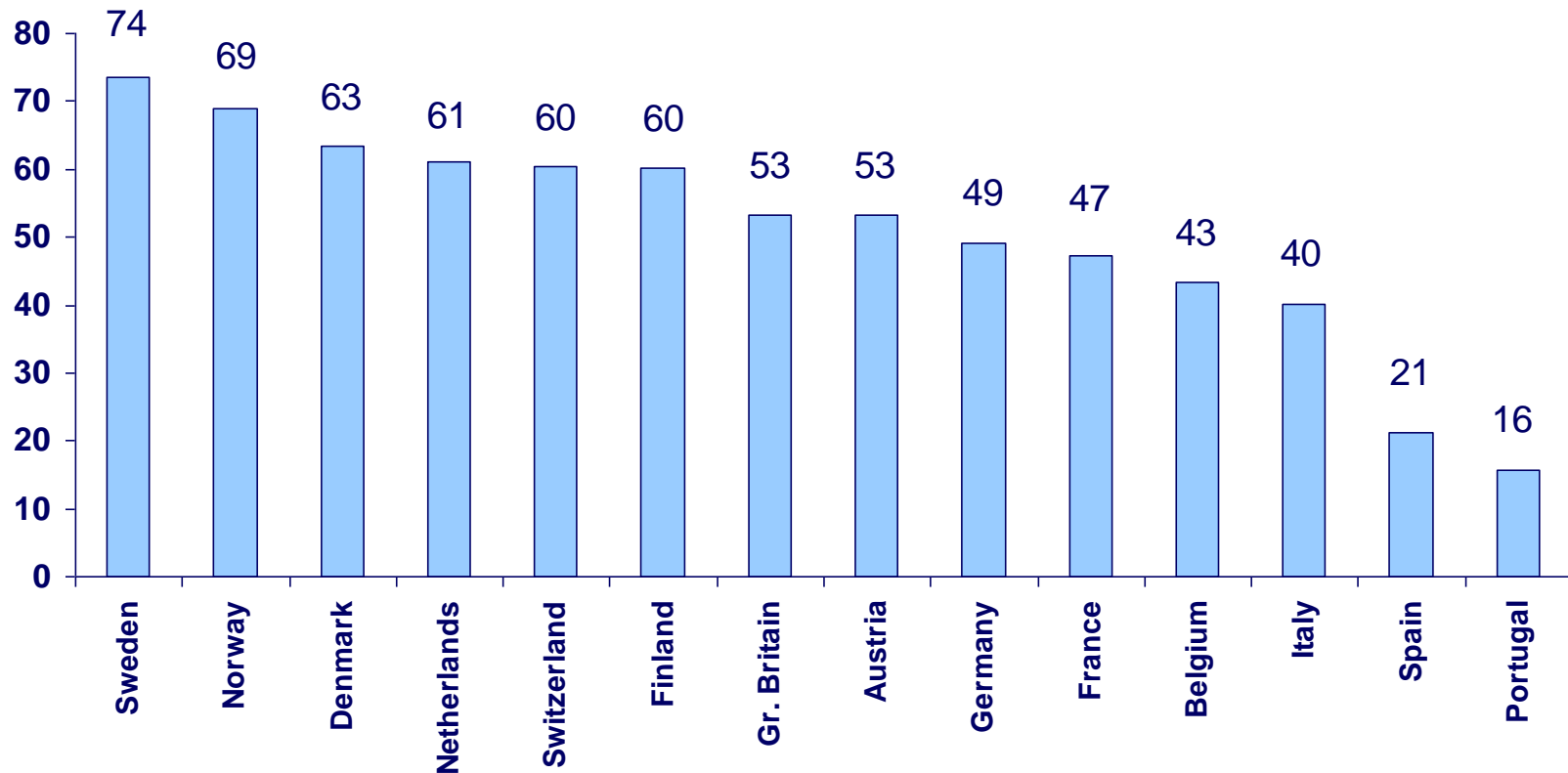
# MPG

## 3. Internet penetration

# Penetration in Europe

## Total coverage in %

« Did you have accès to Internet this year ? »



# Penetration in Europe

## European Internet users

In millions of users

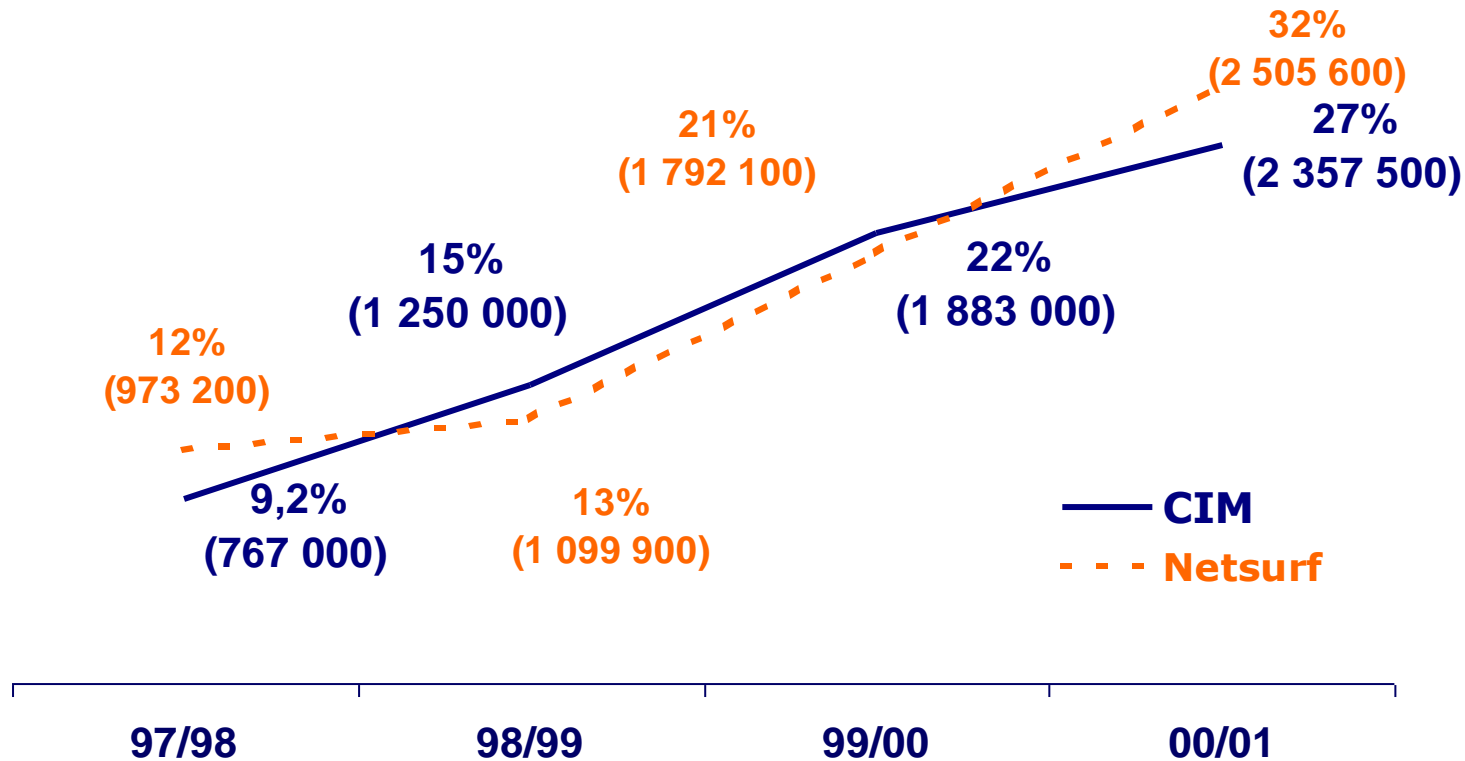
	<b>1999</b>	<b>2000</b>	<b>2001</b>
Germany	14.4	24.0	30.0
UK	12.5	18.0	24.0
Italy	8.2	13.2	16.0
France	5.4	8.5	15.7
Spain	2.8	5.4	7.4
Netherlands	3.0	3.9	5.3
Sweden	3.7	4.0	4.6
Russia	1.5	3.1	4.3
Poland	2.1	2.8	3.8
Portugal	1.0	2.5	3.6
Switzerland	1.8	2.1	2.9
Belgium	1.2	2.3	2.9
Norway	2.0	2.2	2.7
Austria	1.3	2.1	2.6
Danmark	1.5	2.0	2.4
Finlandia	1.7	1.9	2.2
Hungary	0.6	0.7	1.5
Greece	0.8	1.0	1.4
Czech Rep.	0.7	1.0	1.4
Estonia	0.2	0.4	0.4

Source: International Telecommunication Union, March 2002

©2002 NETSTATISTICA.COM

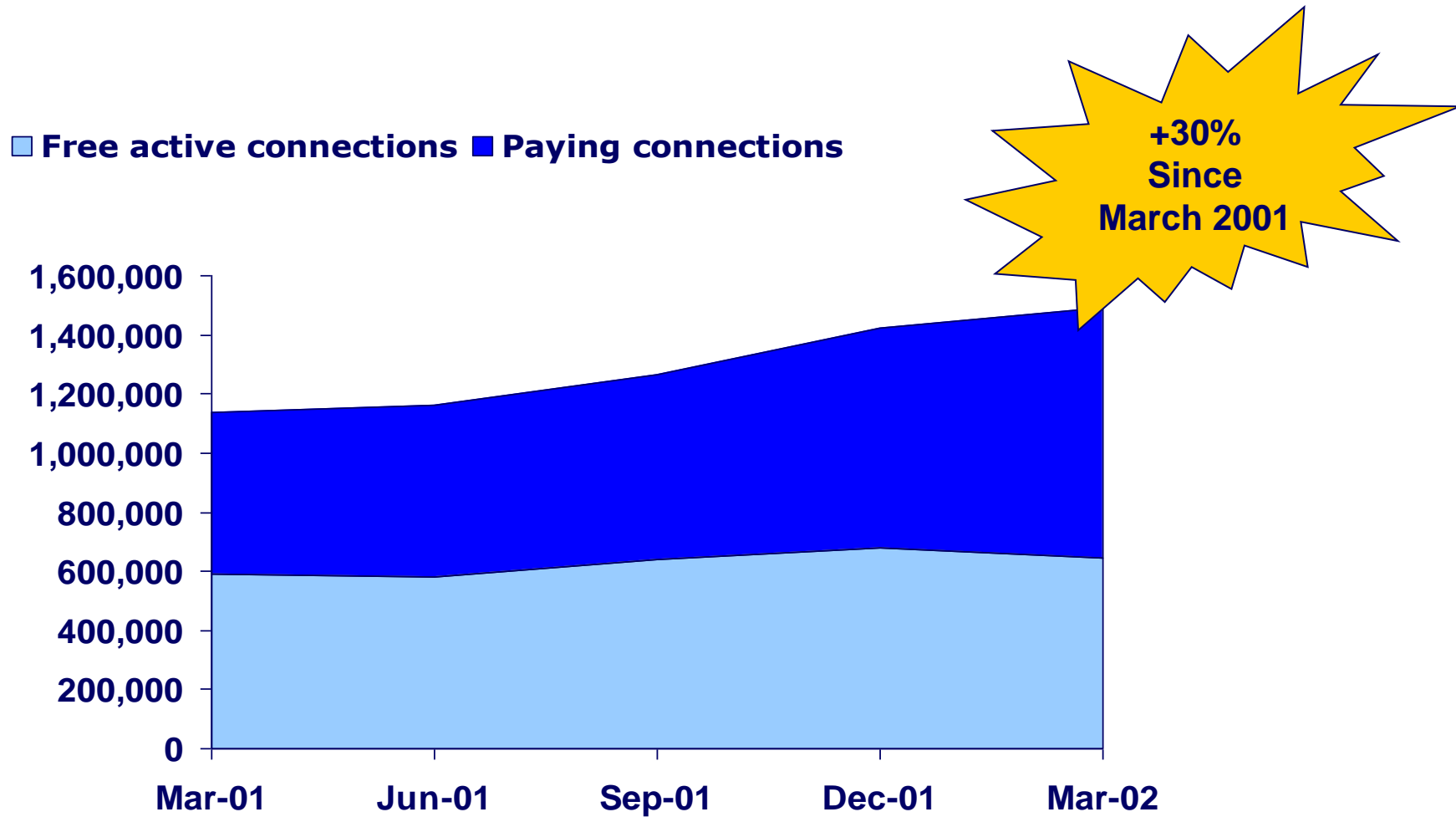
# Penetration evolution in Belgium

« Did you surf those past months ? » CIM annual / Netsurf may (surf only)

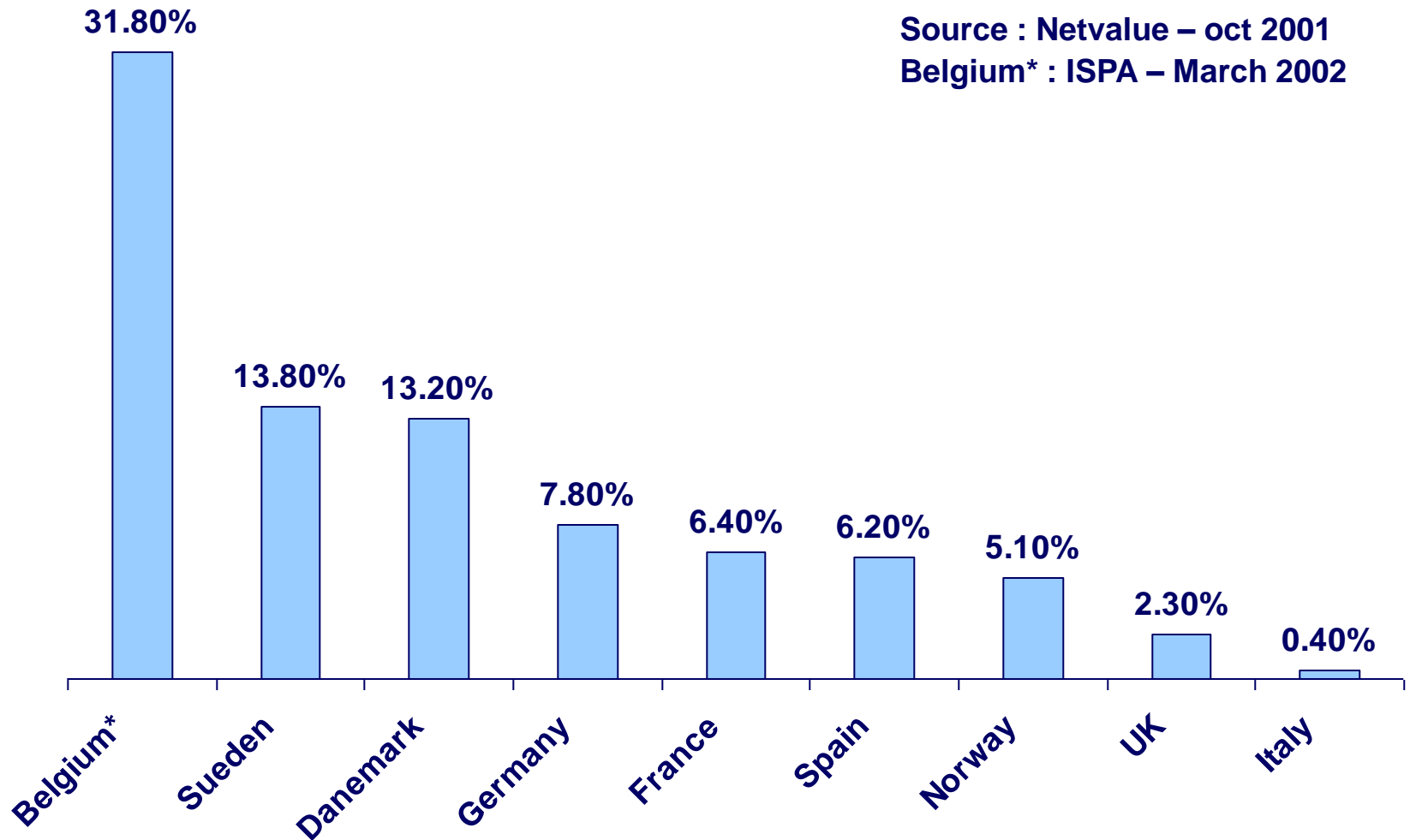


Last available figures in Belgium : Insites / BIM (april 2002) : 38%, TNS may 2002 = 44%

# Free vs paying connections in Belgium

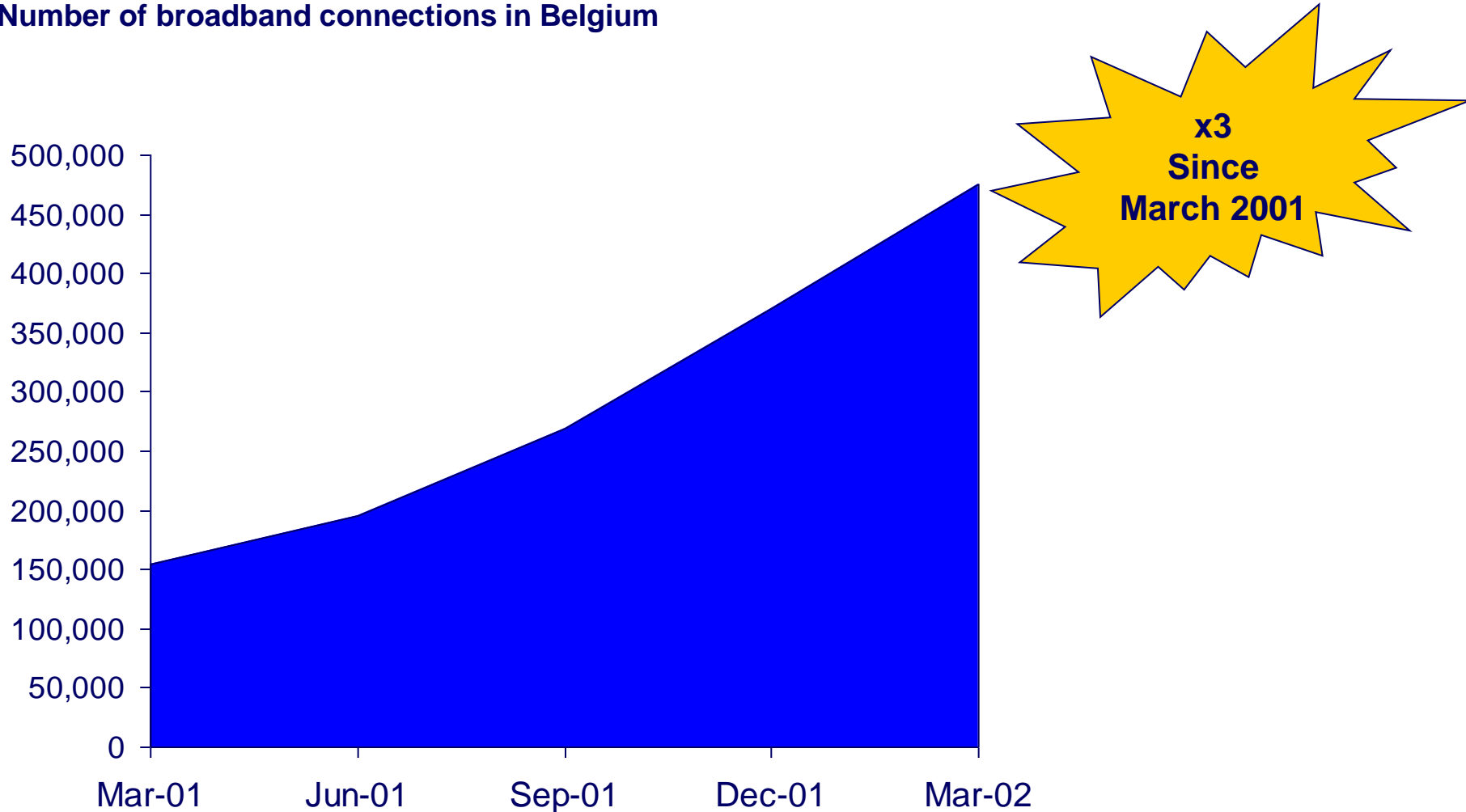


# Broadband penetration



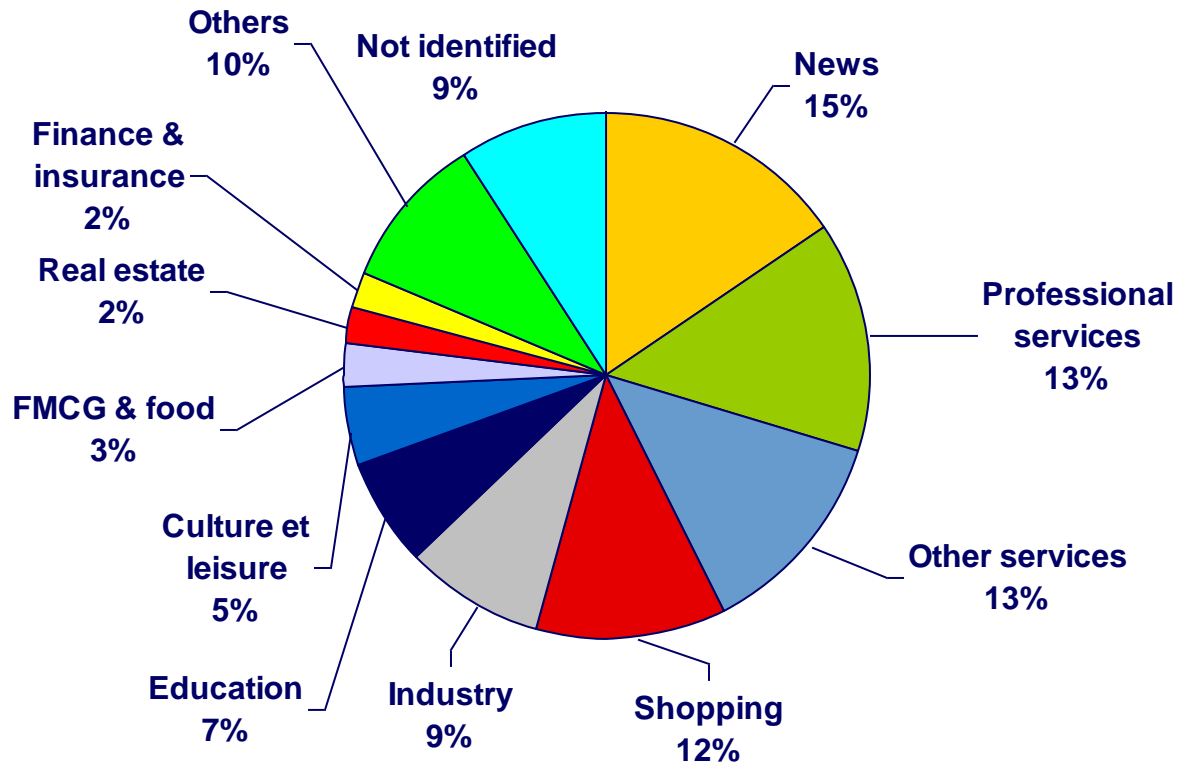
# Broadband evolution in Belgium

Number of broadband connections in Belgium



# Internet today

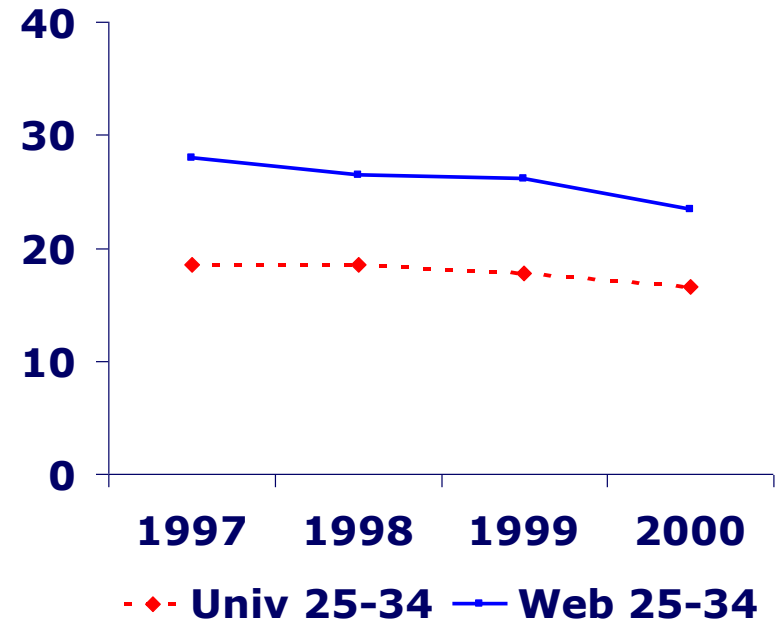
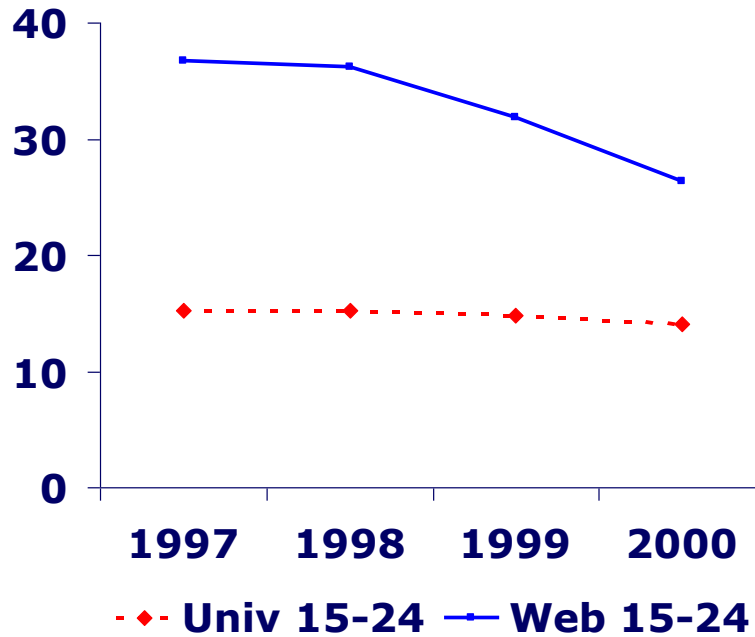
- 31 million domain names registered
- 8.7 million sites (3.1 million public sites)



## 4. Surfers' profile (in Belgium)

# Age

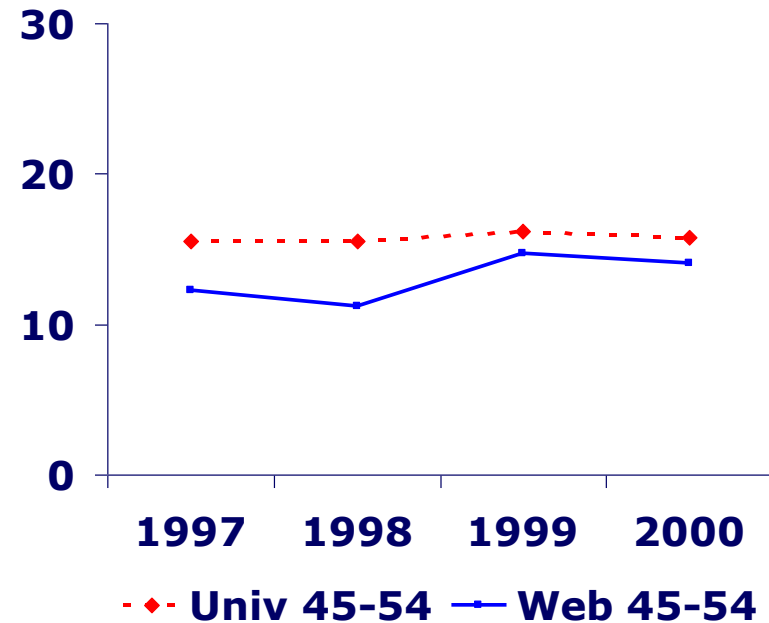
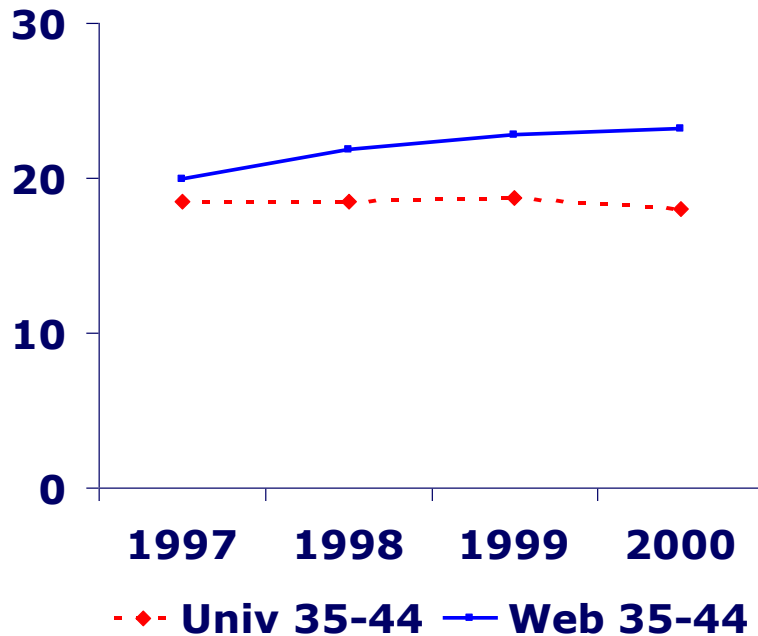
## Evolution of the surfer's age



Source : CIM

# Age

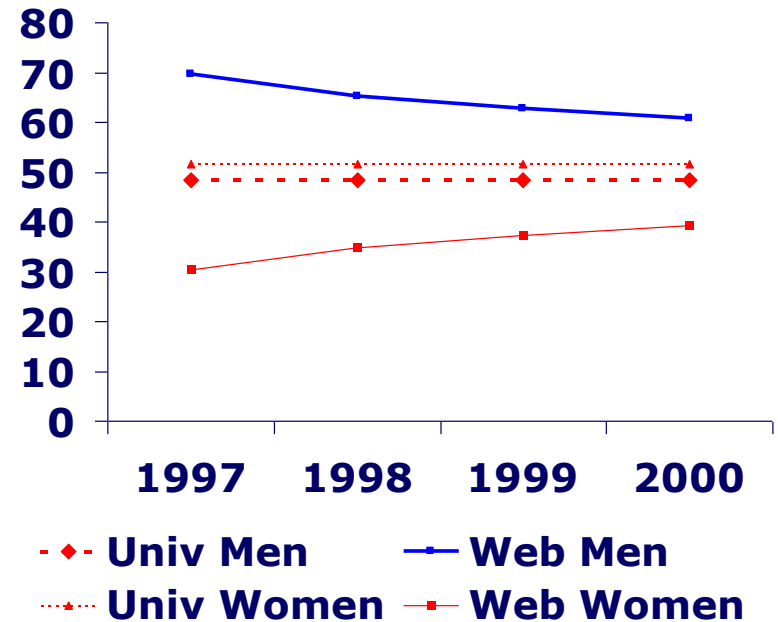
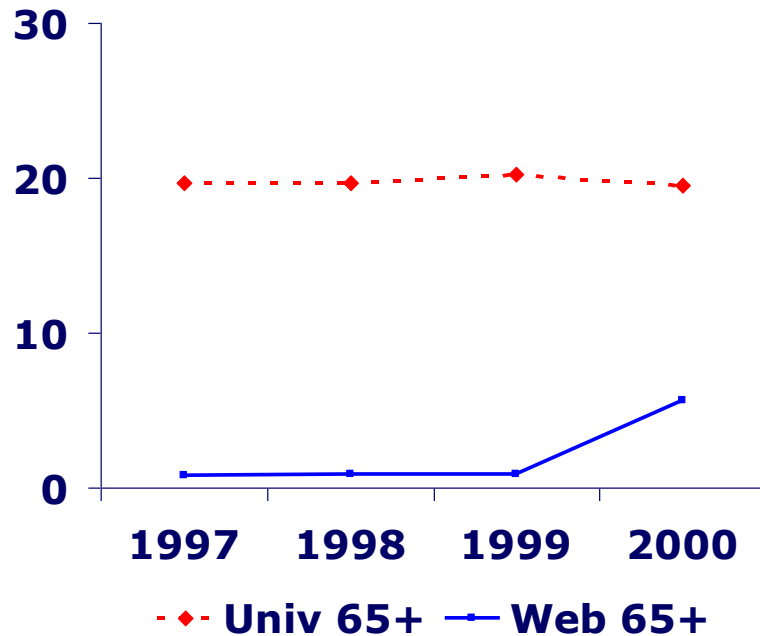
## Evolution of the surfer's age



Source : CIM

# Age / Sex

## Evolution of the surfer's age & sex



Source : CIM

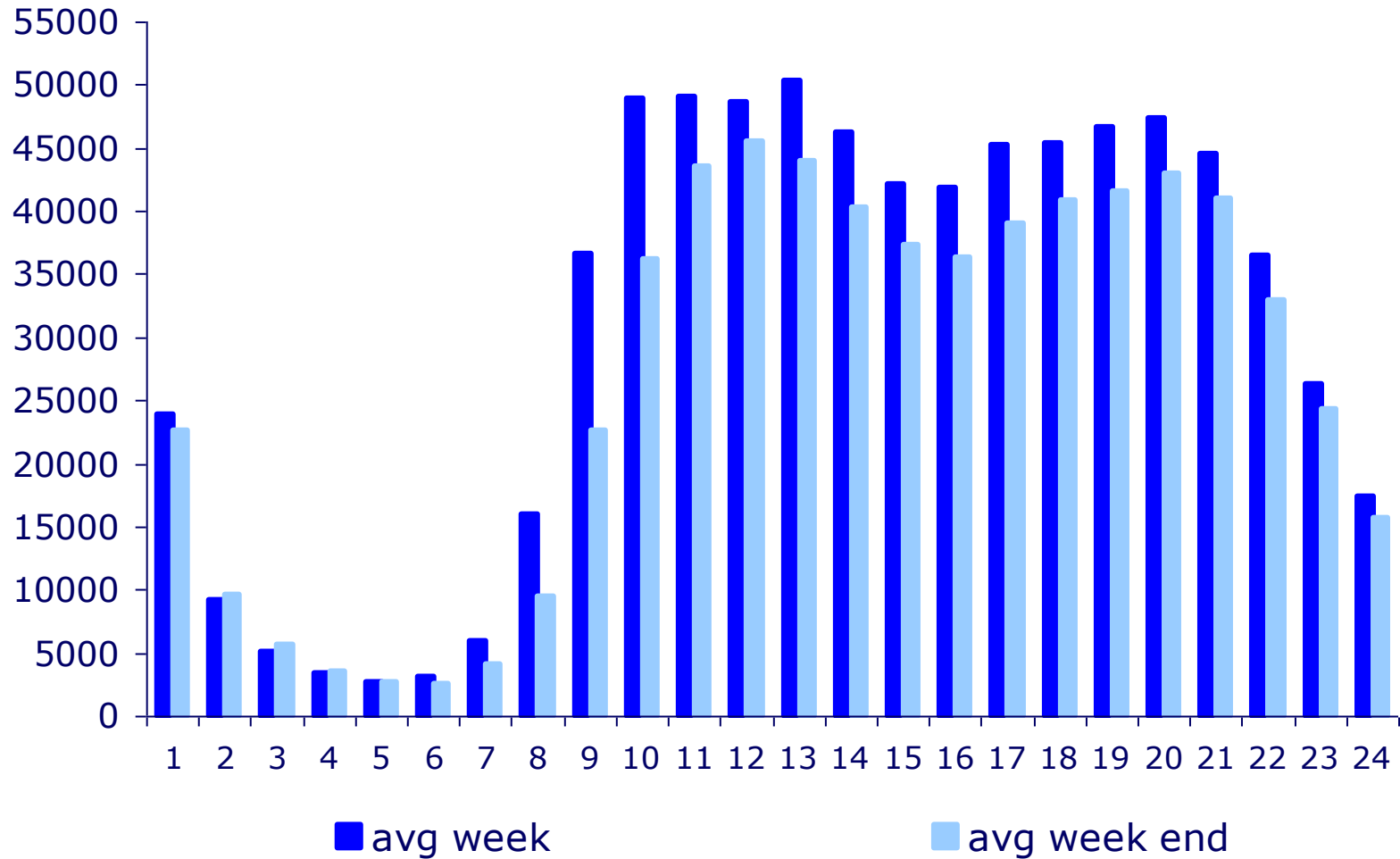
# Home access profile

## Profile of those who have access to the internet at home

Global penetration rate : 23%

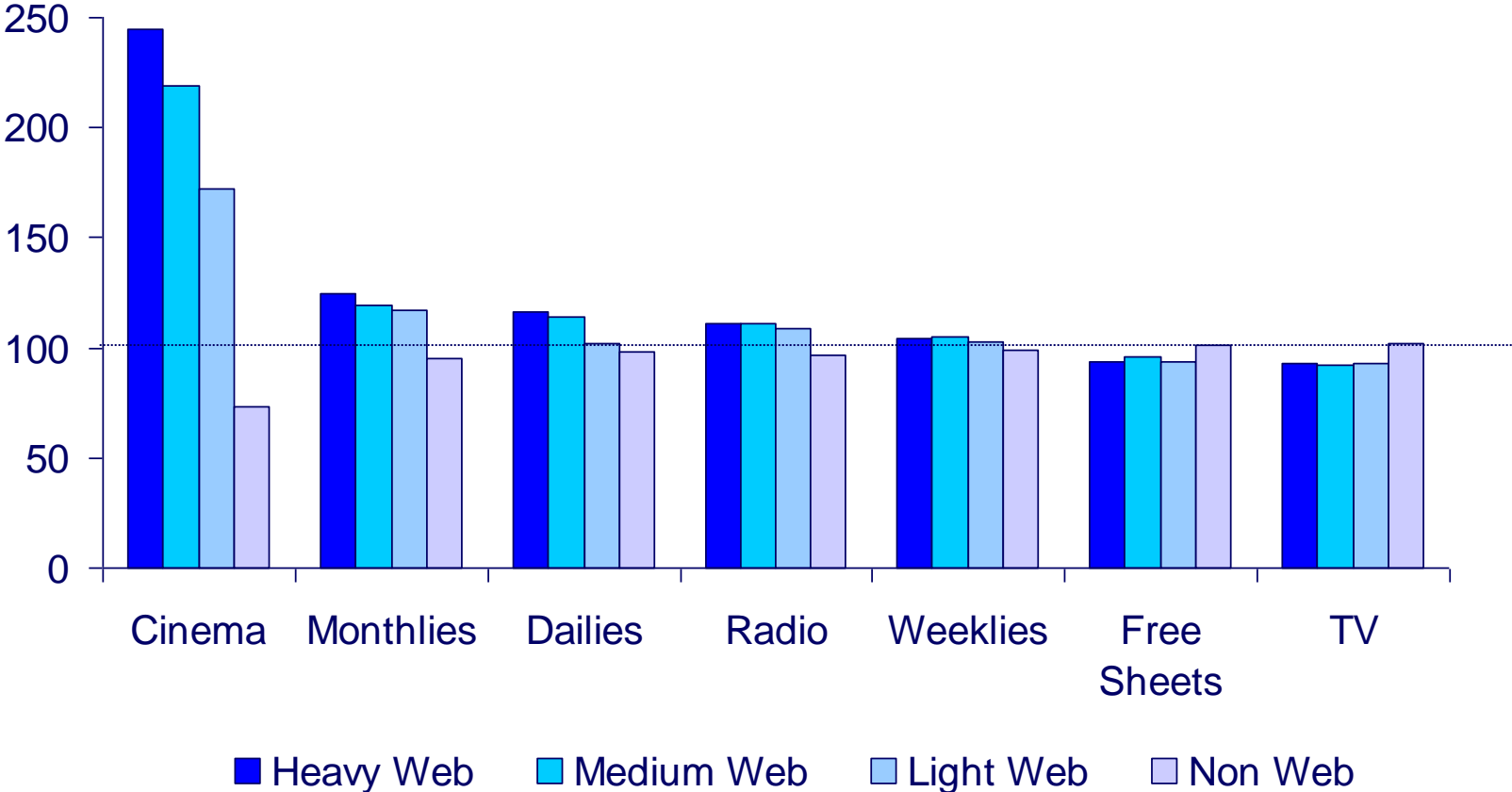


# Surfing hours



# Other Media consumption

## Selectivity Index



# Where do they surf ?

Public results on [www.cim.be](http://www.cim.be)

MetriWeb®'s average numbers per day  
on the last 7 days, last updated with data from  
Sunday, July 7, 2002

		visitors	visits	page requests
total	metriweb	701 815	1 735 893	13 966 189
1	Ad Valvas	24 726	33 354	273 280
2	Annet	3 565	4 259	25 814
3	Auto-On-Net	1 314	1 532	15 805
4	Automagazine	6 566	7 365	96 429
5	Autoscout24	3 297	3 799	66 305
6	Azur	1 335	1 442	8 810
7	BELGACOM NET	32 022	51 052	211 514
8	BIZZ	207	216	804
9	CANAL +	2 462	2 696	12 730
10	CIM	256	278	1 043
11	Cinebel	4 044	4 485	50 679
12	Clickx	15 507	18 923	176 401
13	De Rouck	1 310	1 406	8 777
14	De Standaard Online	32 897	54 499	316 735
15	Decursor	374	387	1 311
16	DH Net	6 805	9 667	63 077
17	DISKIDEE	595	662	2 542
18	Easy	5 449	6 238	136 260
19	Echonet	6 364	9 732	69 764
20	FELIKS	95	103	510
21	Femi Style	1 044	1 160	5 760
22	Forteon	757	1 036	5 655
23	Gamespot	1 587	1 809	14 603
24	Gazet van Antwerpen	12 824	20 469	111 445
25	Groopy	751	887	9 629
26	Group Plus Belgium	951	1 107	4 073
27	Het Belang van Limburg	8 901	14 925	92 933
28	Het BeleggersNet	3 736	6 003	46 960
29	Het Computerwinkeltje	1 270	1 471	17 604
30	HRM net	472	521	1 787
31	Humo The Wild Site	7 504	9 137	47 126

# Where do they surf ?

	visitors	visits	page requests	
32	Immovision	650	713	11 062
33	Immoweb	10 465	12 779	533 699
34	Infobelcom	36 270	41 779	367 136
35	Internetaddict	590	675	1 869
36	JIM	3 015	4 026	(irrelevant)
37	Jobat	3 577	3 885	40 299
38	Jobscareer	6 643	7 434	76 572
39	Jobstoday	332	341	905
40	Joepie	469	496	4 801
41	Kanaal 2	3 434	3 990	(irrelevant)
42	Knack	3 099	3 899	21 036
43	Koopjeskrant	4 003	4 410	51 515
44	Krant van West-Vlaanderen	222	262	1 118
45	La Libre	7 256	10 569	44 583
46	Le Soir en ligne	16 895	23 089	118 040
47	LookNmeet	18 773	31 705	236 076
48	Luxpoint	154	165	452
49	M S N Belgium	212 907	383 127	1 330 574
50	MAIL . BE	4 178	7 534	79 621
51	MaoMagazine	17	18	48
52	Media Marketing	741	793	2 869
53	Medinet	821	875	3 713
54	Mine	4 234	5 022	43 543
55	Monster	10 096	11 212	95 744
56	Netwerk	422	449	3 333
57	Onlinelu	2 631	3 850	28 061
58	Pages d,Or - Gouden Gids	28 089	33 725	202 081
59	Place.to.be	13 494	22 670	80 212
60	Planet Internet	55 962	91 930	408 246
61	Planet Sport	20 697	31 431	753 892
62	Proxis	6 987	7 738	67 158
63	Q MUSIC	1 555	1 900	(irrelevant)
64	Quirit	726	765	7 756
65	Rendez-Vous (fr)	16 395	30 489	910 113
66	Rendez-Vous (nl)	8 154	15 486	662 051
67	rsc Anderlecht	5 980	8 982	128 136
68	RTL BE	7 154	9 357	74 184

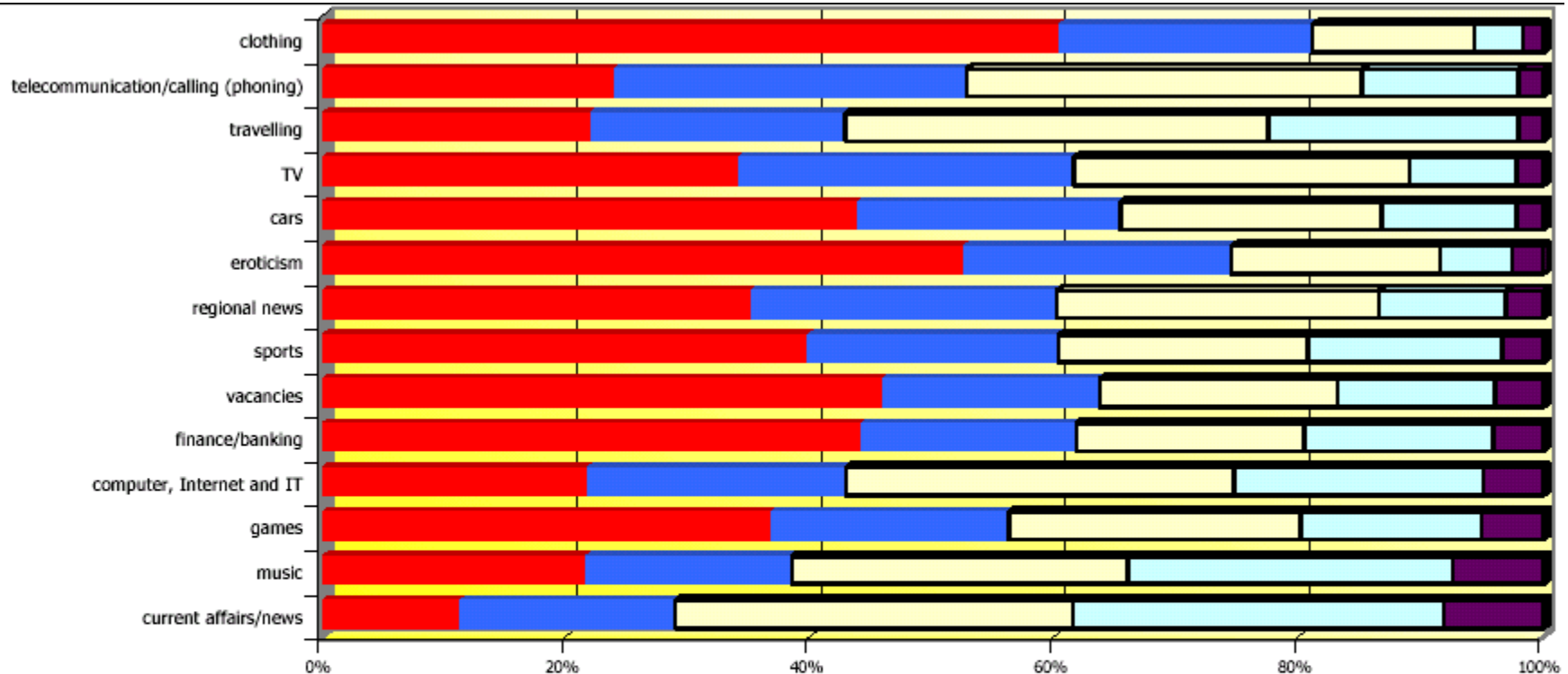
# Where do they surf ?

		visitors	visits	page requests
69	Skynet	100 375	184 858	1 136 742
70	Spelletjesgarnaal	10 868	18 106	932 981
71	Sporever	2 013	2 449	22 481
72	Sport Magazine	281	301	2 004
73	Stepstone	11 678	13 220	129 701
74	Swing	9 767	14 983	131 759
75	Teldir	22 224	24 806	117 646
76	Telenet Breedband	78 608	172 681	828 664
77	Theme Park Vision	1 077	1 383	27 508
78	Tijd Net	21 129	37 964	219 071
79	TISCALI	26 256	38 066	354 597
80	TOP Radio	3 759	4 720	(irrelevant)
81	Trends/Tendances Online	979	1 152	5 642
82	TVSITE	1 382	1 772	10 994
83	UPto	874	928	4 733
84	Vacature	8 210	9 097	83 317
85	vdab	14 452	18 530	507 114
86	Vlan on-line	5 245	6 007	101 892
87	VNUnet	808	912	3 382
88	VT4	7 259	10 070	48 945
89	VTM	8 615	10 439	(irrelevant)
90	Wanadoo	18 239	27 616	127 123
91	Webwatch	721	795	3 421
92	Yezzz	3 986	6 195	220 131
93	zappybaby	2 828	4 018	48 291
94	ZDNet	5 515	7 042	30 520

# What are they looking for ?

Which information are you looking for on Internet ?

(Source Insites BIM Octobre 2001)

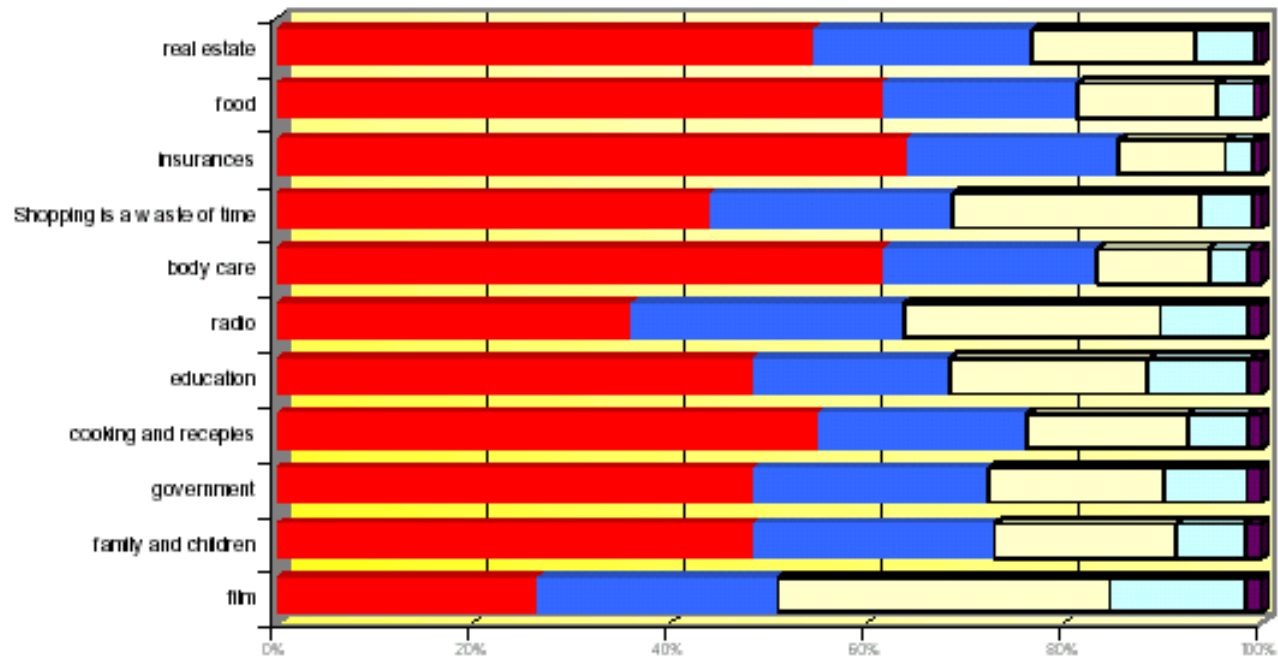


	current affairs/news	music	games	computer, Internet and IT	finance/banking	vacancies	sports	regional news	eroticism	cars	TV	travelling	telecommunication/calling (phoning)
■ daily	8,16%	7,39%	5,03%	4,92%	4,08%	3,98%	3,38%	3,04%	2,53%	2,20%	2,19%	2,05%	2,02%
■ often	30,34%	26,65%	14,87%	20,39%	15,53%	12,85%	15,90%	10,46%	5,91%	11,05%	8,72%	20,51%	12,84%
■ sometimes	32,60%	27,49%	23,87%	31,82%	18,66%	19,53%	20,41%	26,36%	17,06%	21,38%	27,56%	34,60%	32,40%
■ seldom	17,60%	16,91%	19,45%	21,16%	17,60%	17,79%	20,52%	25,01%	21,96%	21,55%	27,45%	20,90%	28,81%
■ never	11,31%	21,56%	36,78%	21,71%	44,13%	45,85%	39,80%	35,13%	52,53%	43,82%	34,08%	21,95%	23,93%

# What are they looking for ?

Which information are you looking for on Internet ?

(Source Insites BIM Octobre 2001)

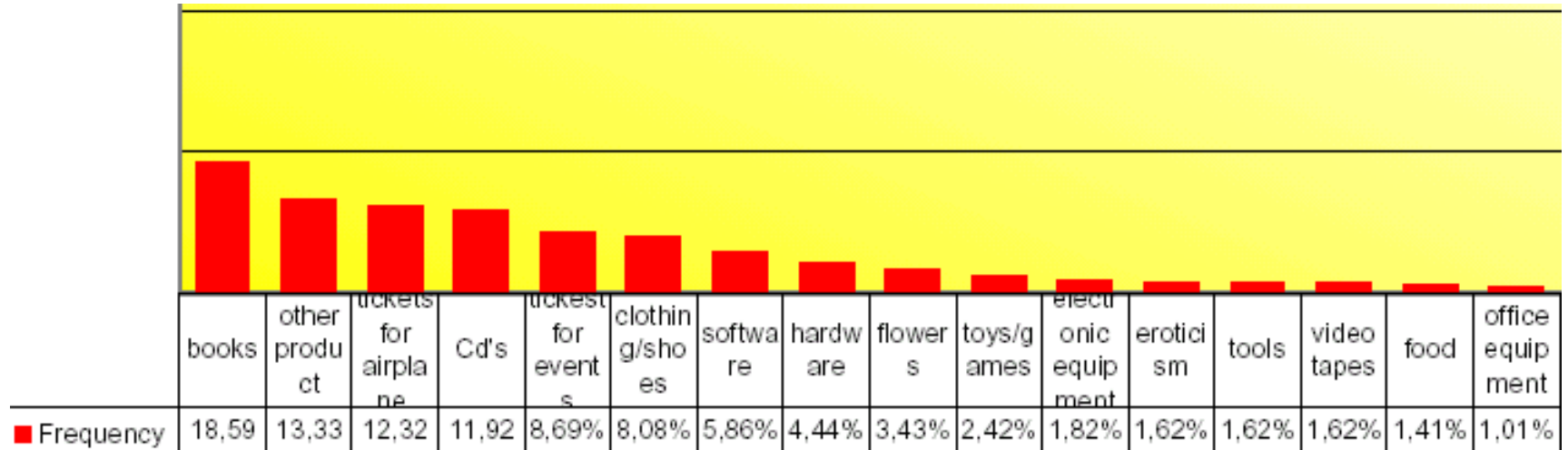


	film	family and children	government	cooking and recepies	education	radio	body care	Shopping is a waste of time	Insurances	food	real estate
■ daily	1,63%	1,62%	1,47%	1,29%	1,29%	1,24%	1,24%	0,90%	0,84%	0,73%	0,62%
▣ often	13,72%	6,95%	8,34%	6,17%	10,27%	9,00%	4,07%	5,34%	2,75%	3,78%	6,12%
▤ sometimes	33,69%	18,54%	17,93%	16,39%	20,09%	26,04%	11,43%	25,01%	10,88%	14,11%	16,46%
▥ seldom	24,41%	24,31%	23,73%	21,27%	19,98%	27,56%	21,49%	24,56%	21,42%	19,86%	22,25%
■ never	26,55%	48,57%	48,53%	54,88%	48,37%	36,16%	61,76%	44,18%	64,11%	61,51%	54,55%

# E-commerce

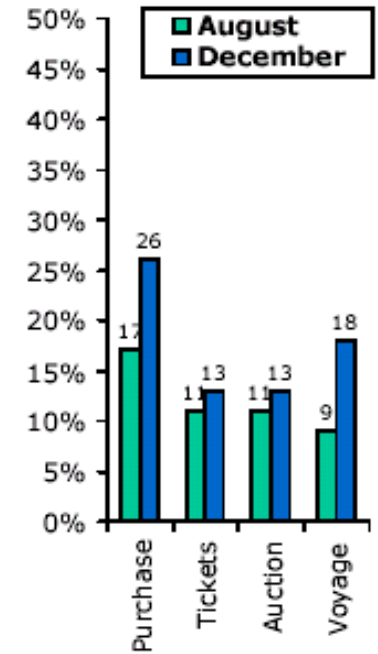
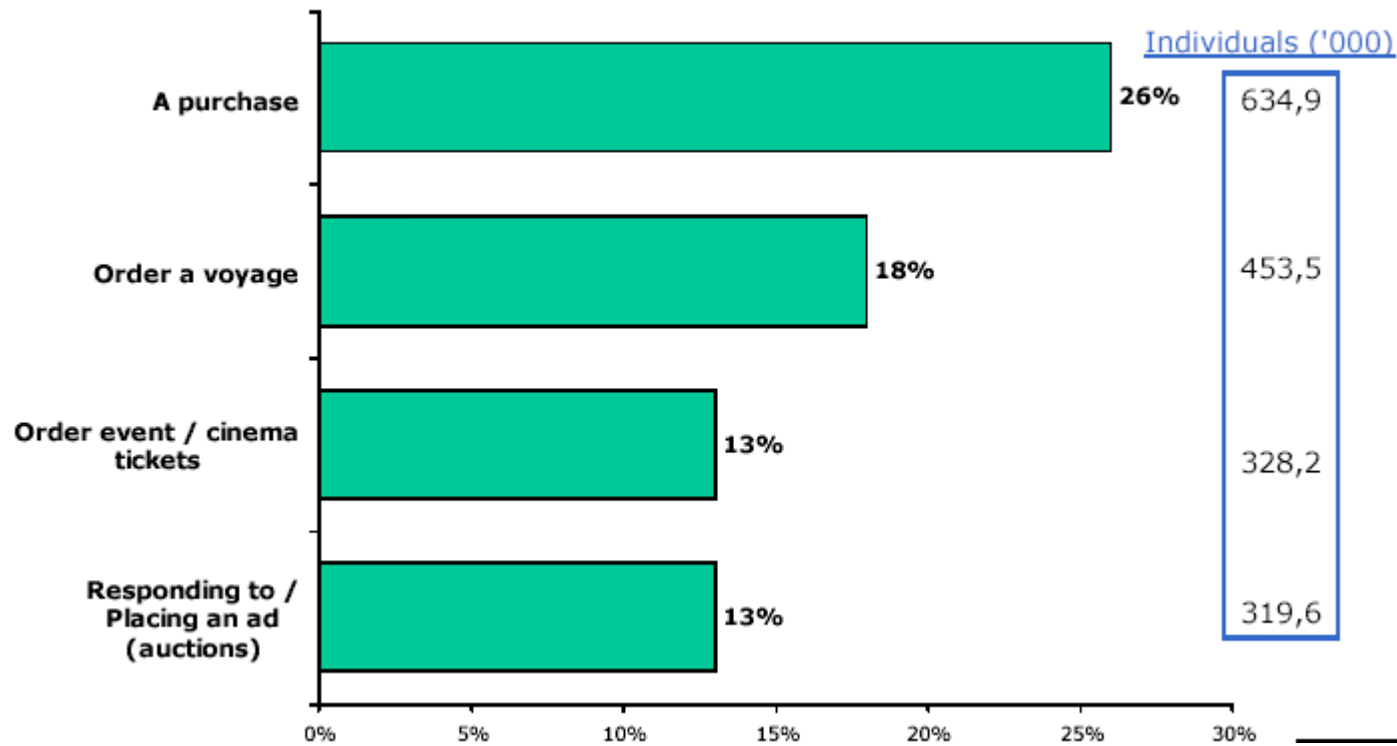
Which was the last product you bought on Internet ?

(Source Insites BIM Octobre 2001)



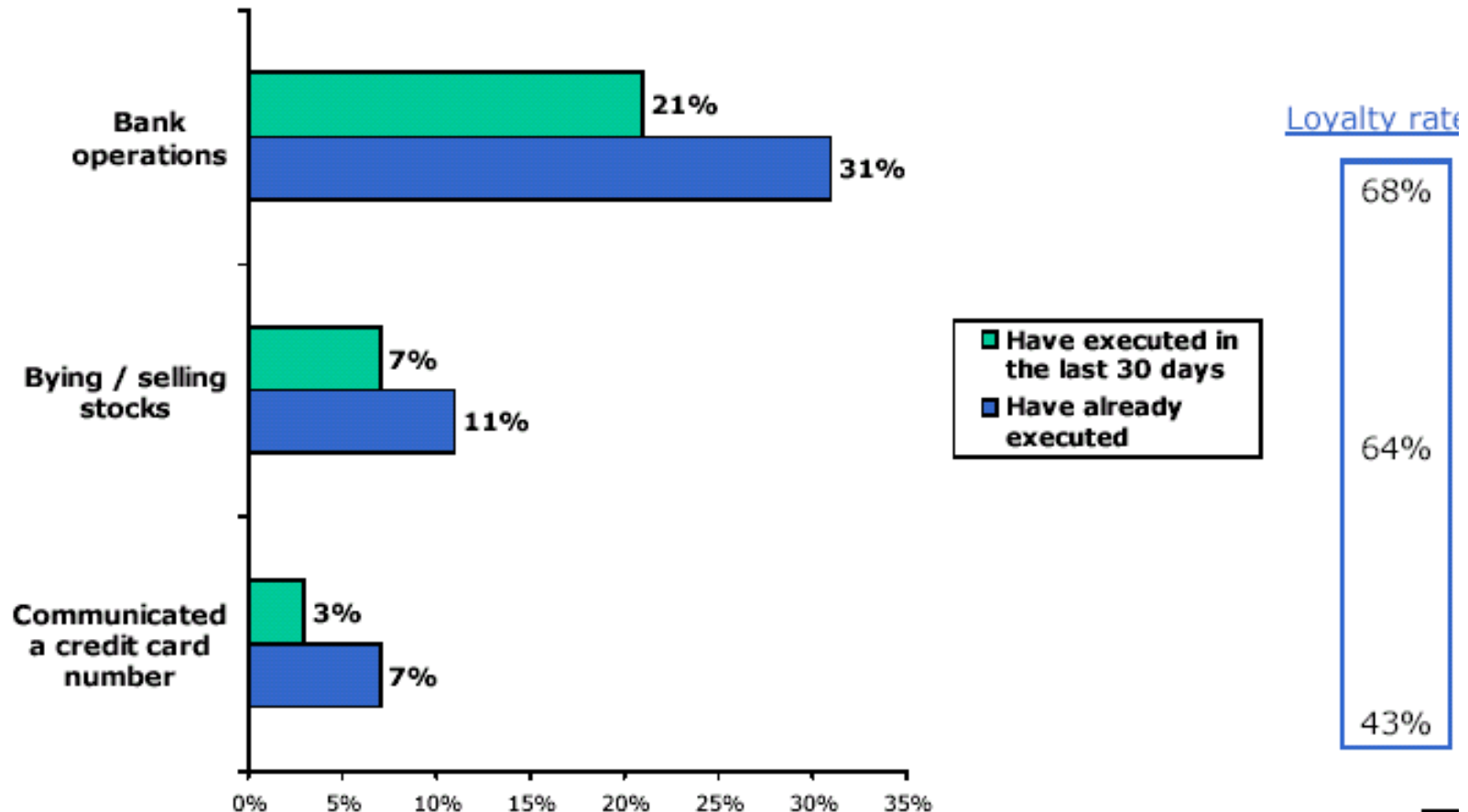
# E-commerce

"Have you personally ever executed one of the following activities on the internet?"



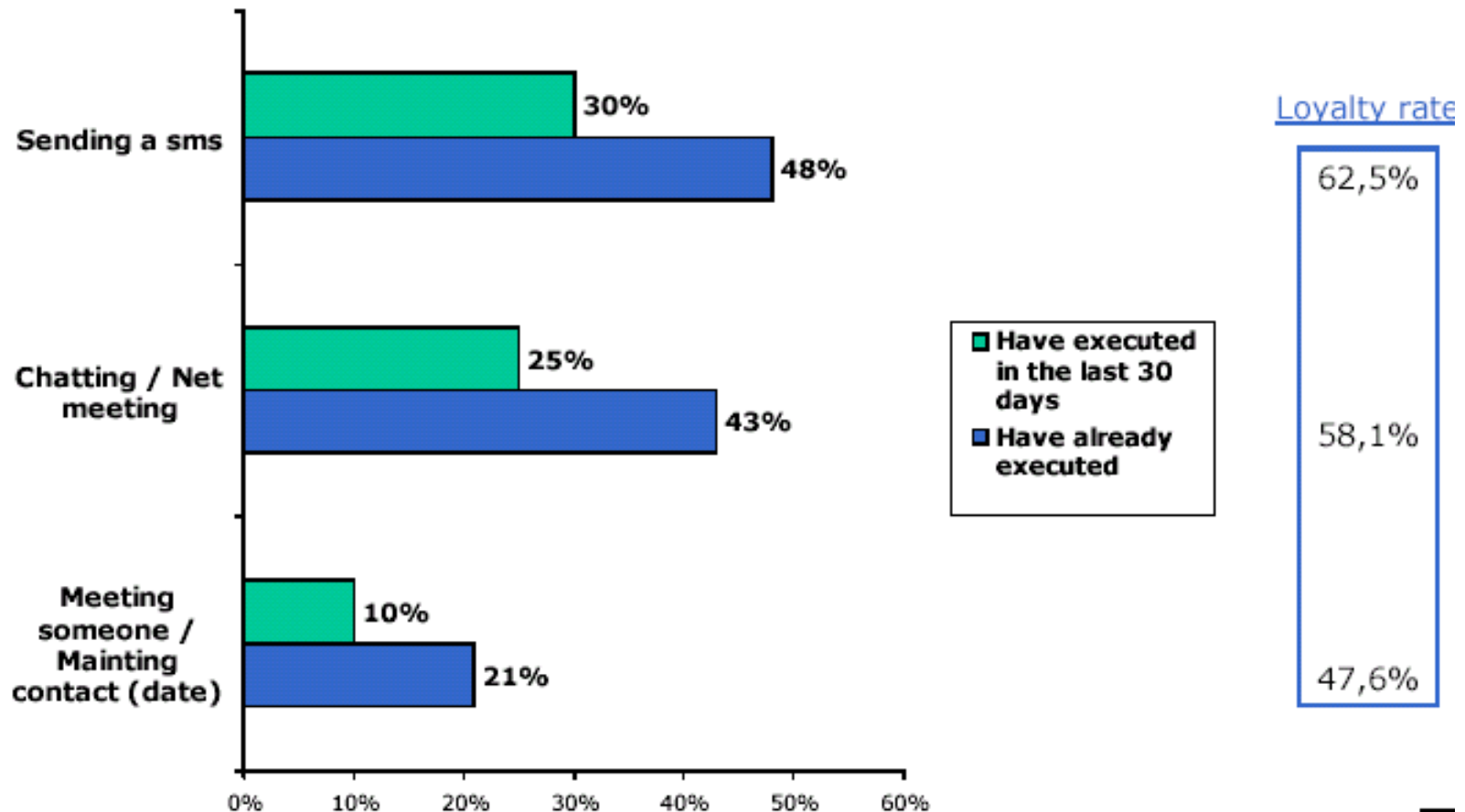
# E-commerce

Loyalty rate : Have executed in the last 30 days / Have already executed



# E-commerce

Loyalty rate : Have executed in the last 30 days / Have already executed



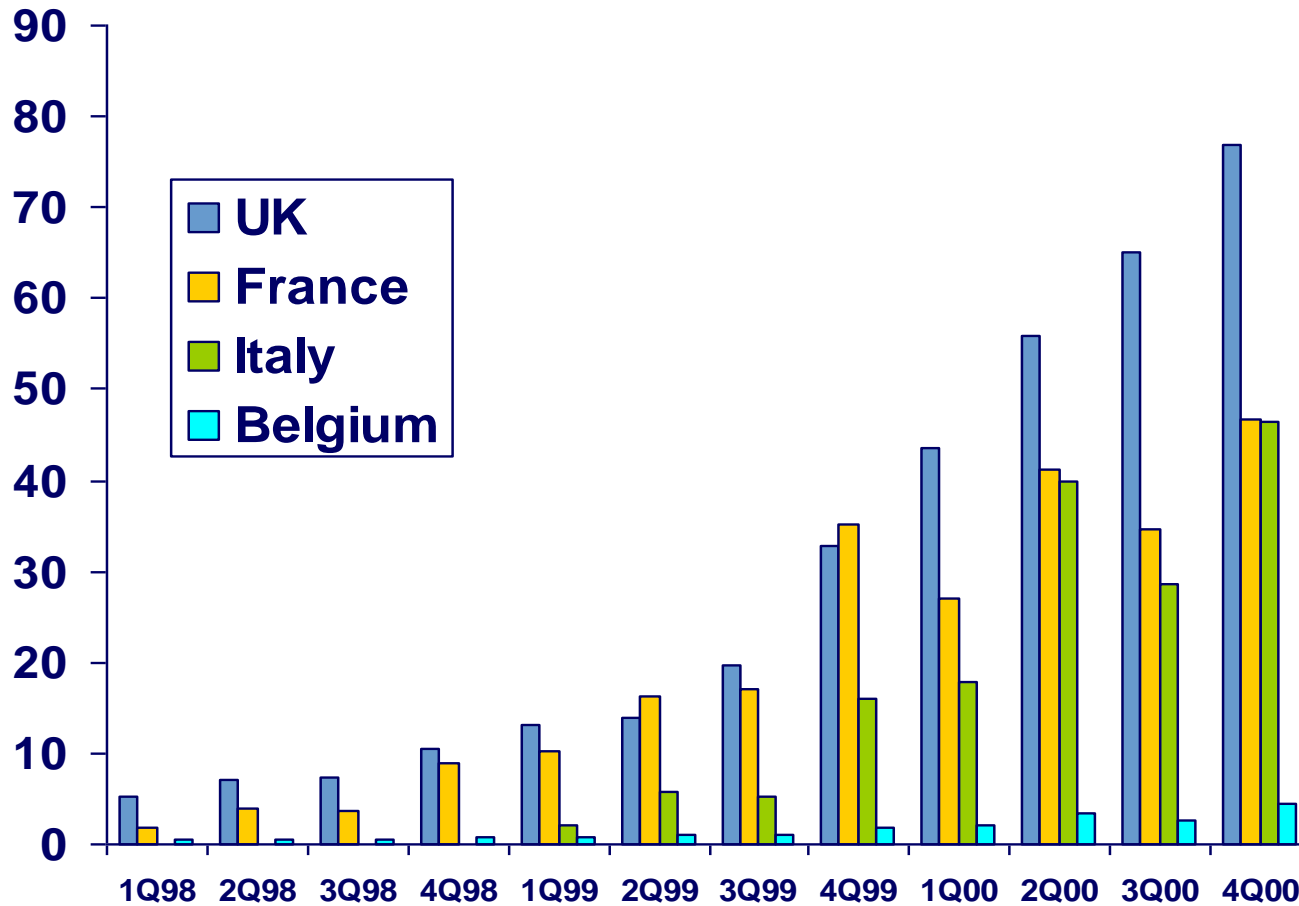
# Profile du surfer

- Internet is no longer a media for young computer freaks
- Surfeurs use proactively Internet and are ready to pay online
- Surfers use less television than non surfers
- Surfers often go to the movie theater
- Internet is still selective on higher social classes

## 5. Advertising investments

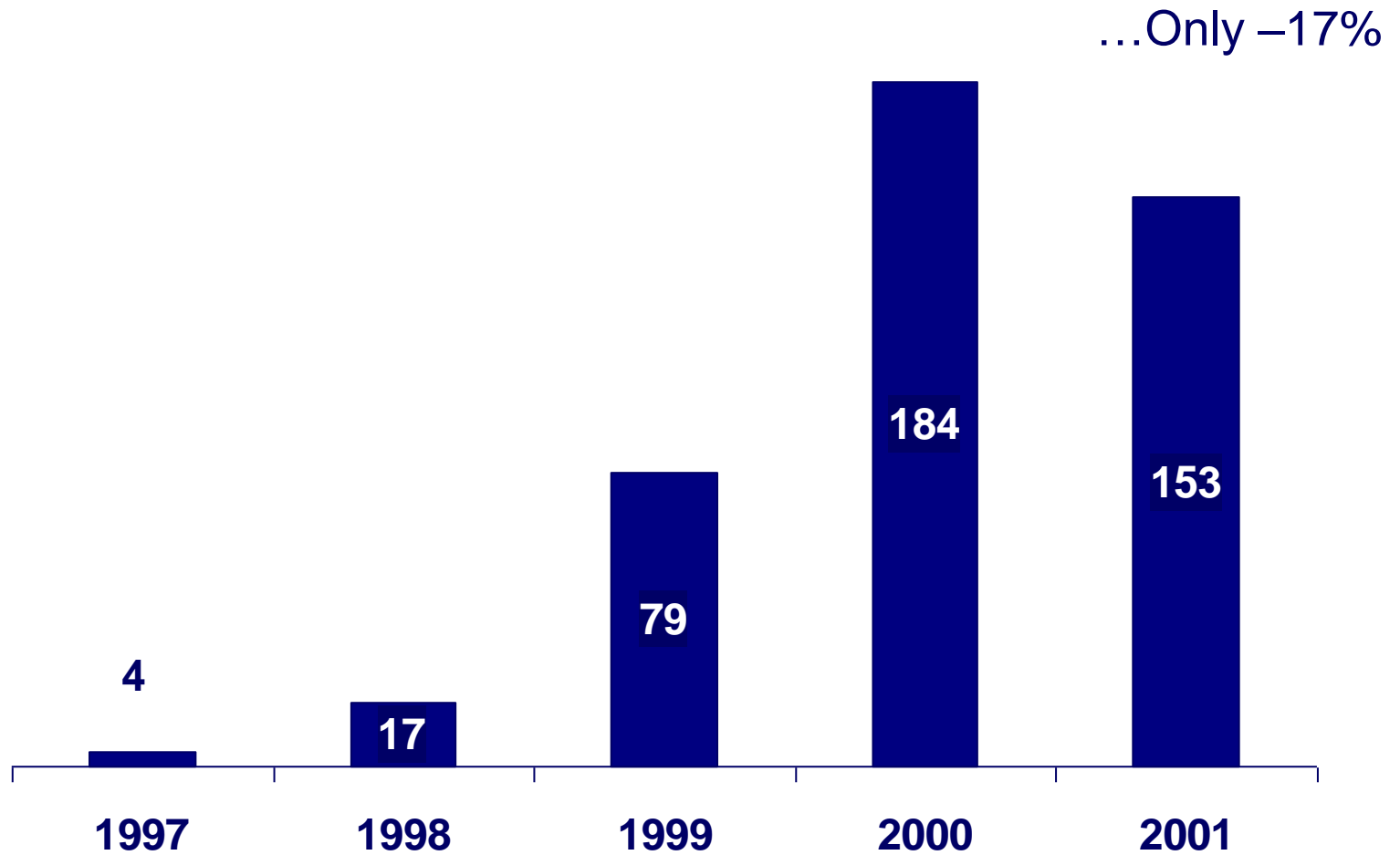
# PwC/IAB quarterly revenue figures

Million Euros



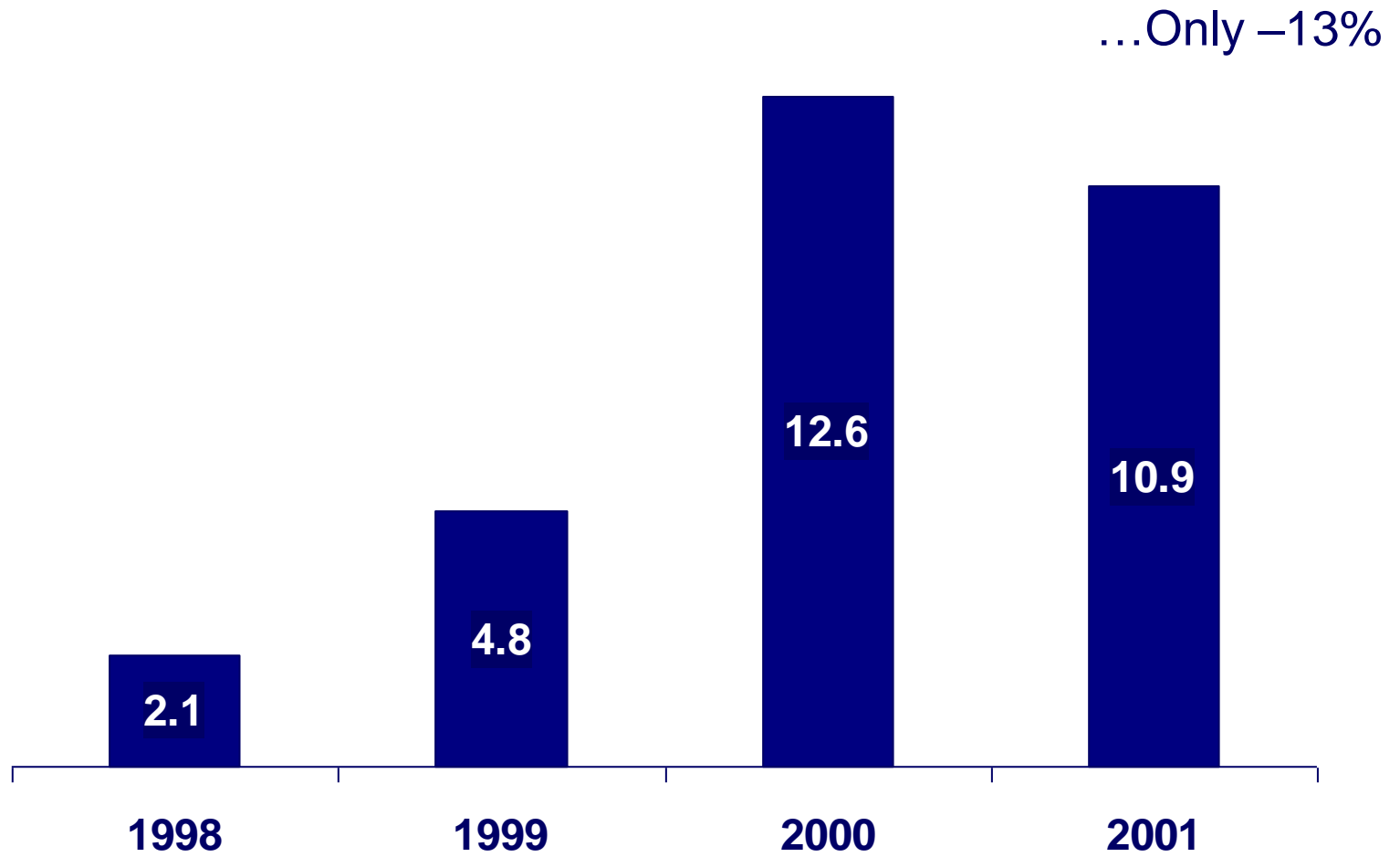
Source: PricewaterhouseCoopers/IAB

# France (million euros)



Source IAB-PWC - Belgium

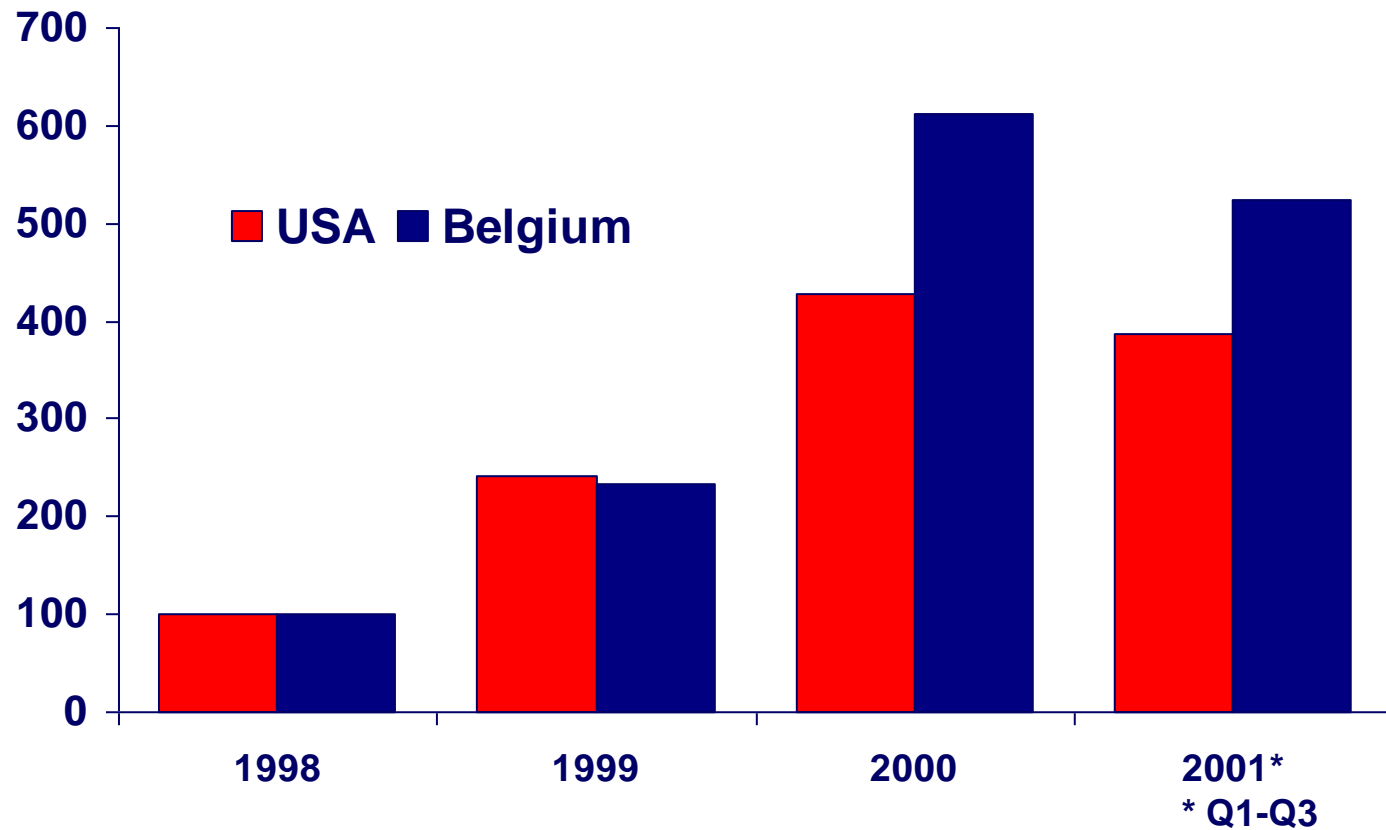
# Belgium (million euros)



Source IAB-PWC - Belgium

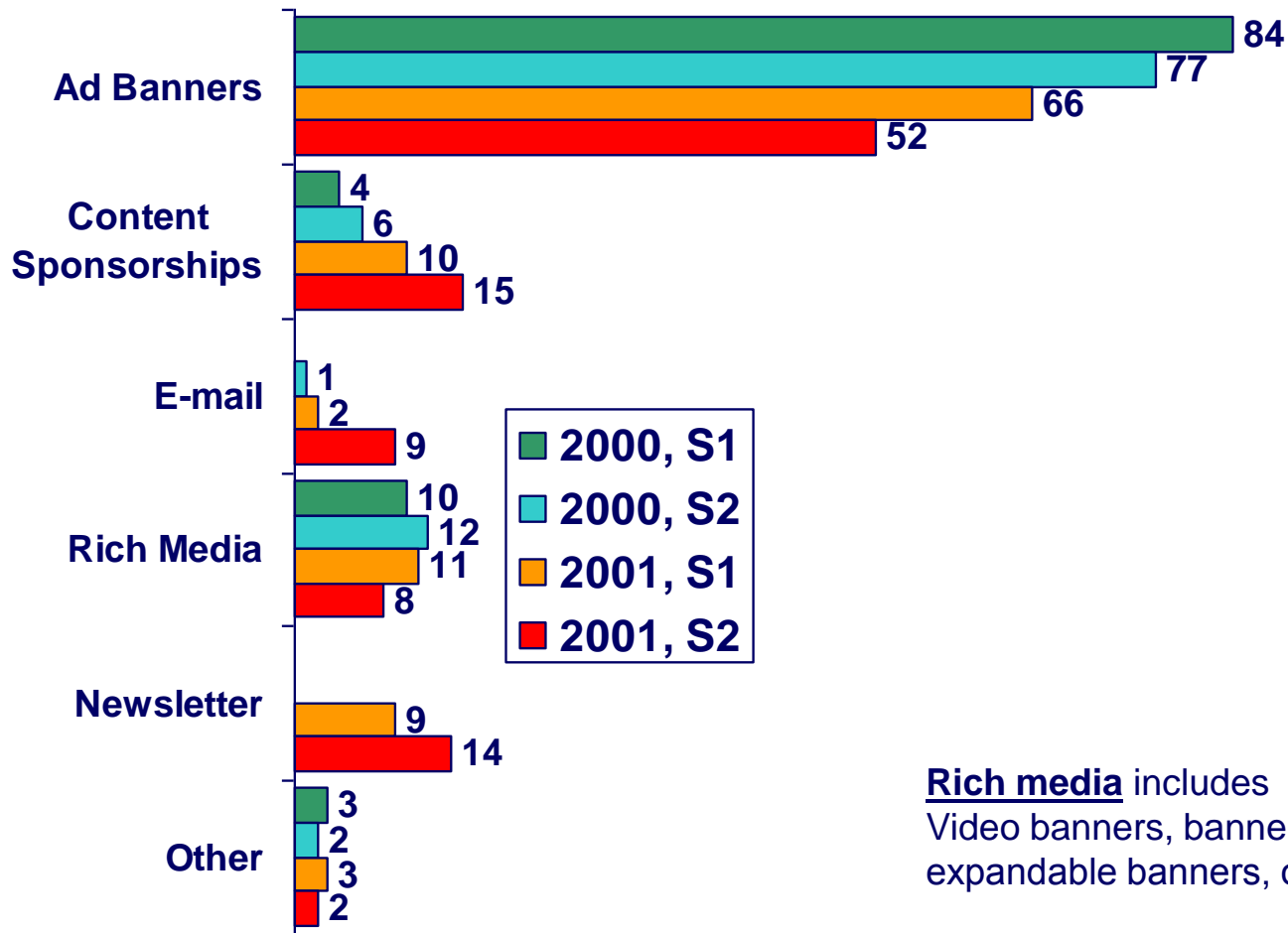
# The International Perspective

## Index 100 = 1998



Source IAB-PWC - Belgium

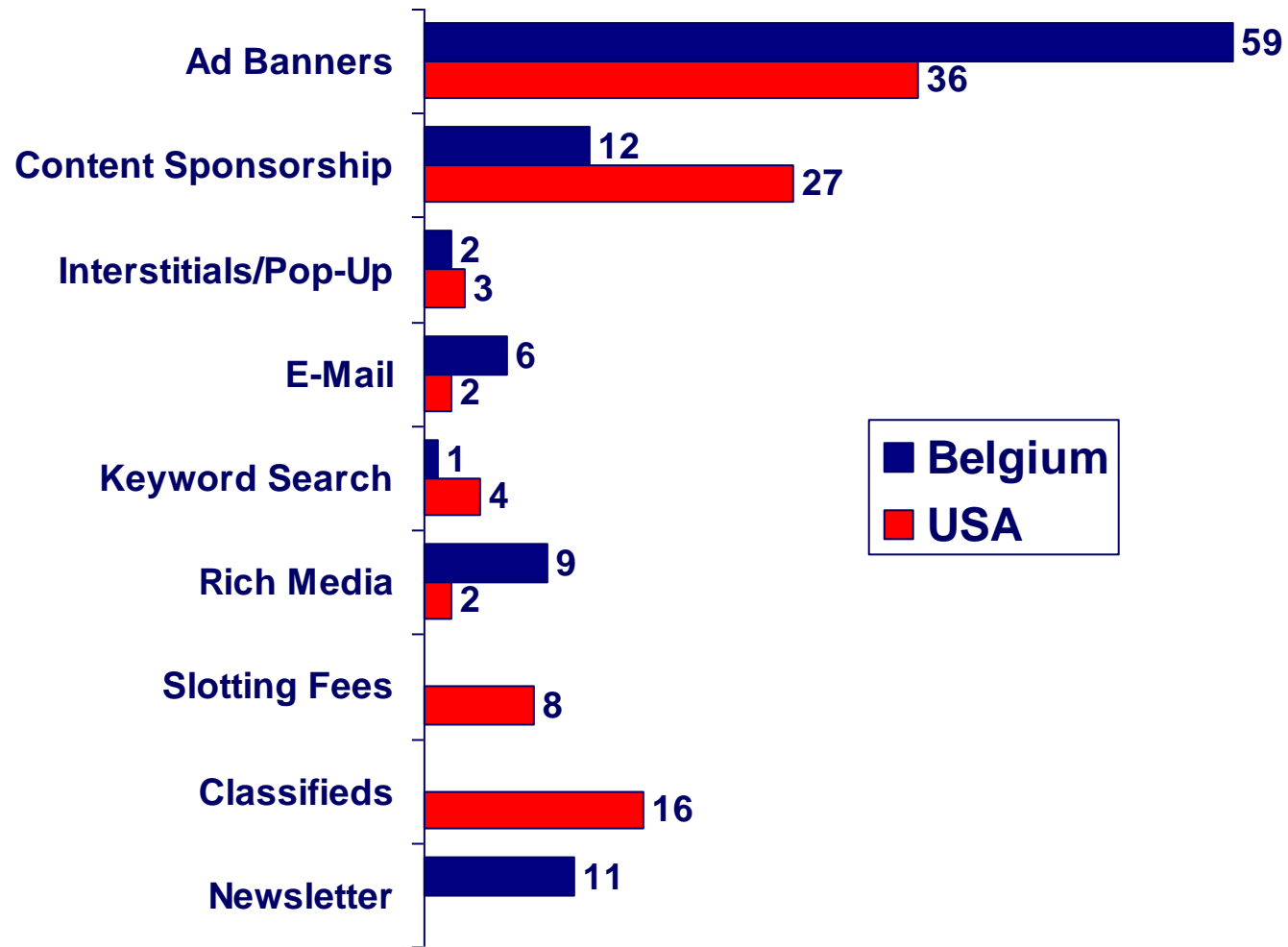
# Belgium : Banners are decreasing... e-mail and newsletter increase...



**Rich media** includes Flash banners, Video banners, banners with sound, expandable banners, overlays, IMUs ...

Source IAB-PWC - Belgium

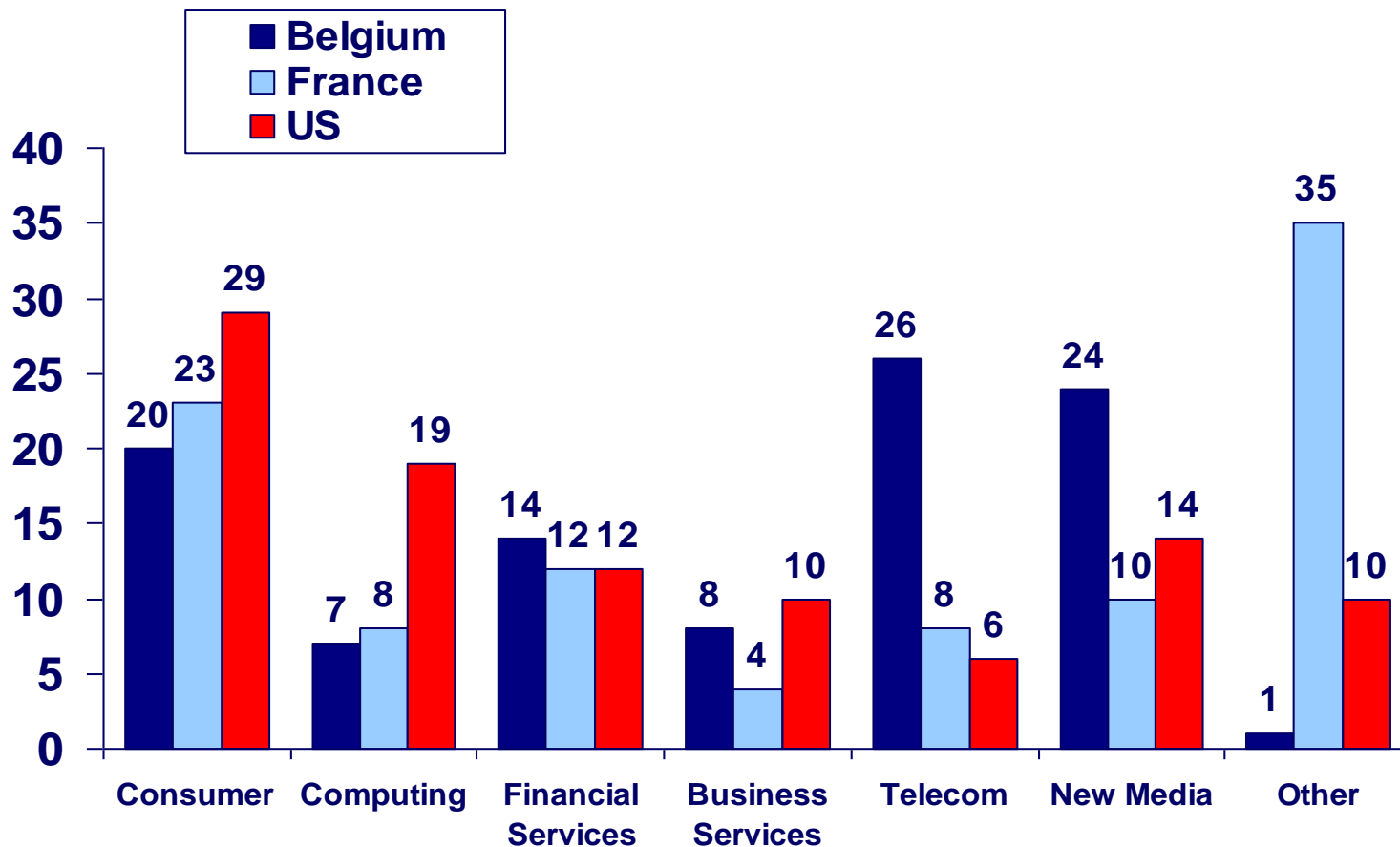
# Compared to USA (Belgium: 2001, US: first 3 quarters 2001)



Source IAB-PWC - Belgium

# Sectors : % of online ad investments

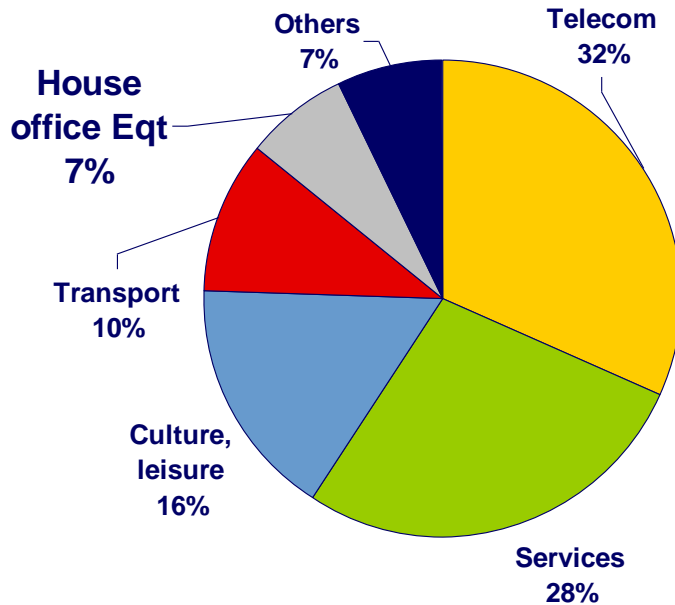
(Belgium: 2001, US: first 3 quarters 2001)



Source IAB-PWC - Belgium

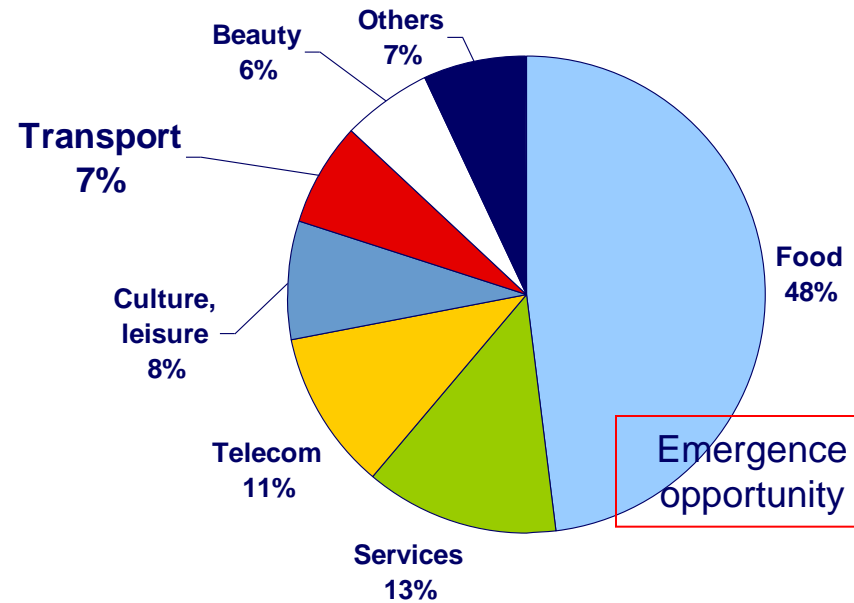
# Belgium : Sector comparaisn

## Internet



Source IAB-PWC - Belgium

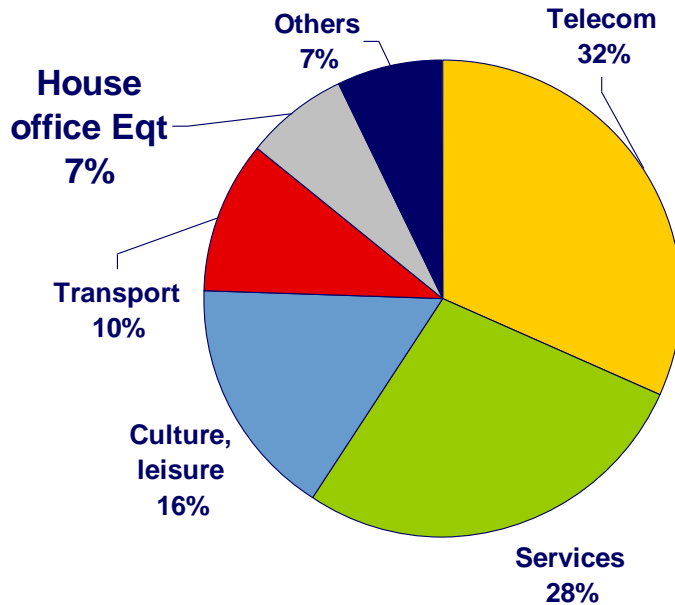
## Movie



Source : Pige CIM 2001

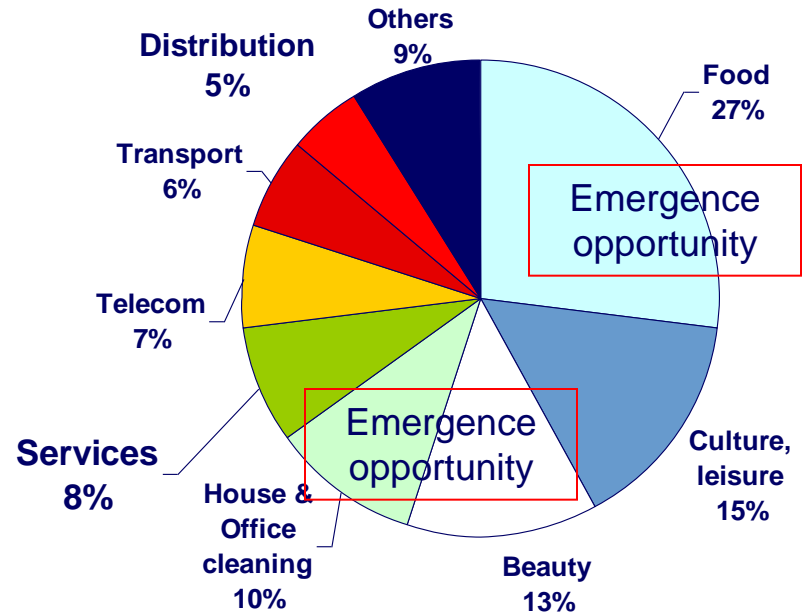
# Belgium : Sector comparaisn

## Internet



Source IAB-PWC - Belgium

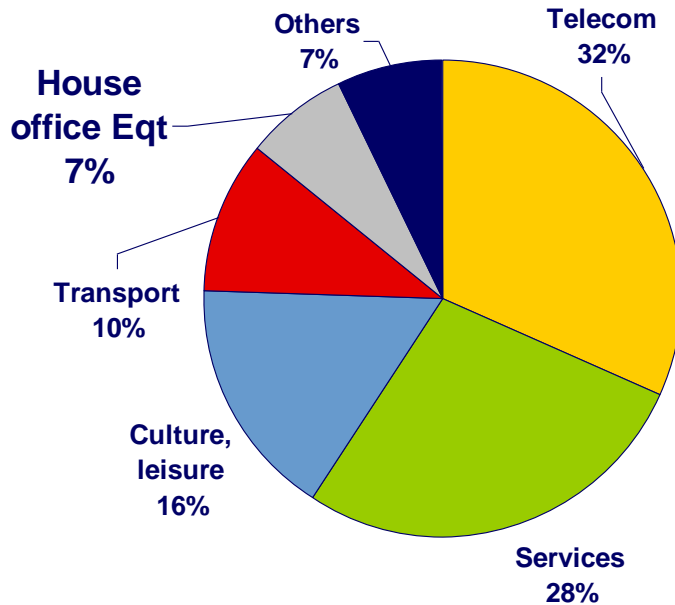
## TV



Source : Pige CIM 2001

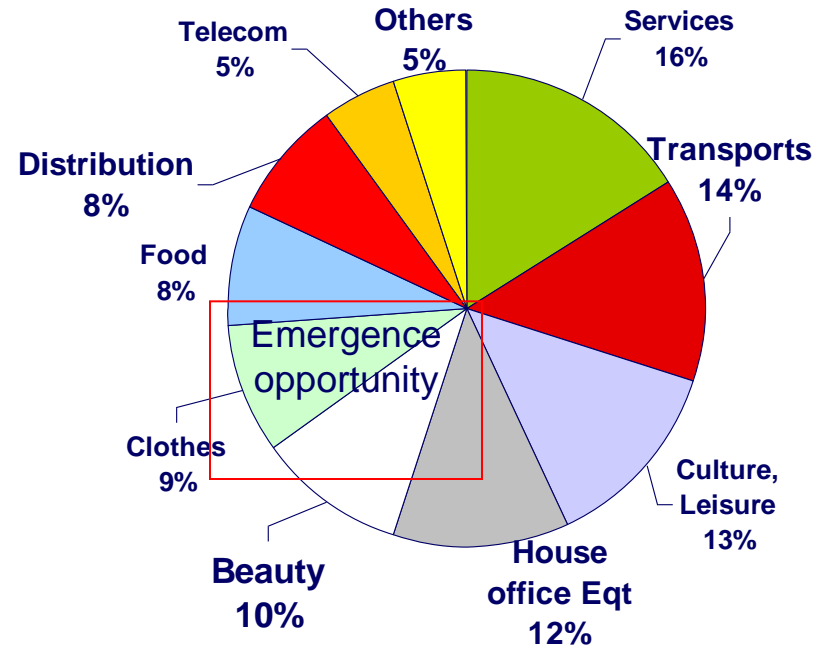
# Belgium : Sector comparaison

## Internet



Source IAB-PWC - Belgium

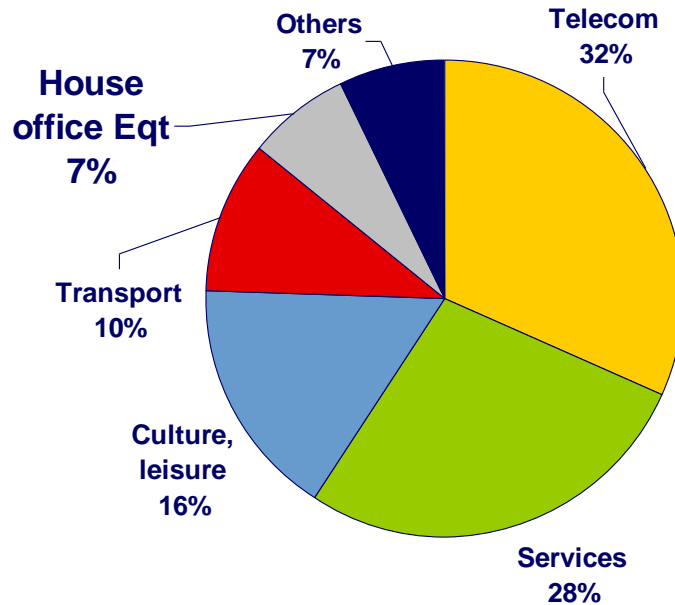
## Magazines



Source : Pige CIM 2001

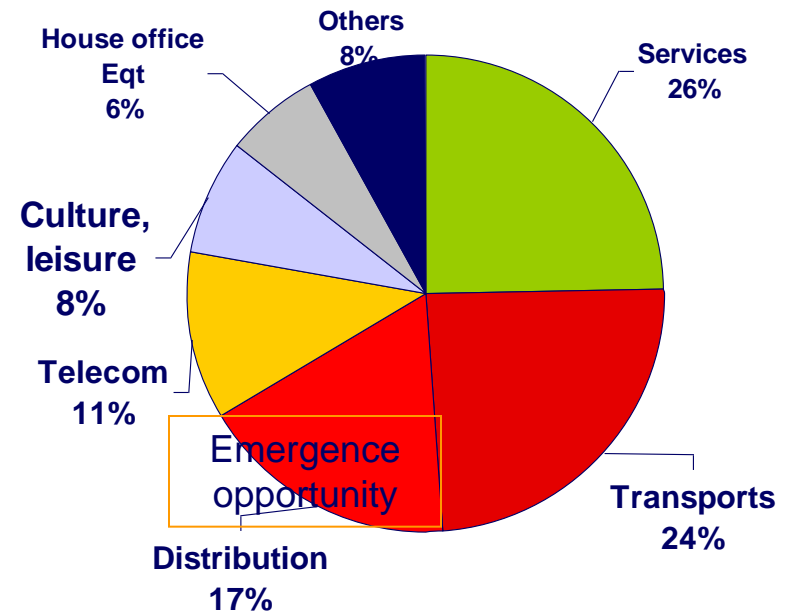
# Belgium : Sector comparaison

## Internet



Source IAB-PWC - Belgium

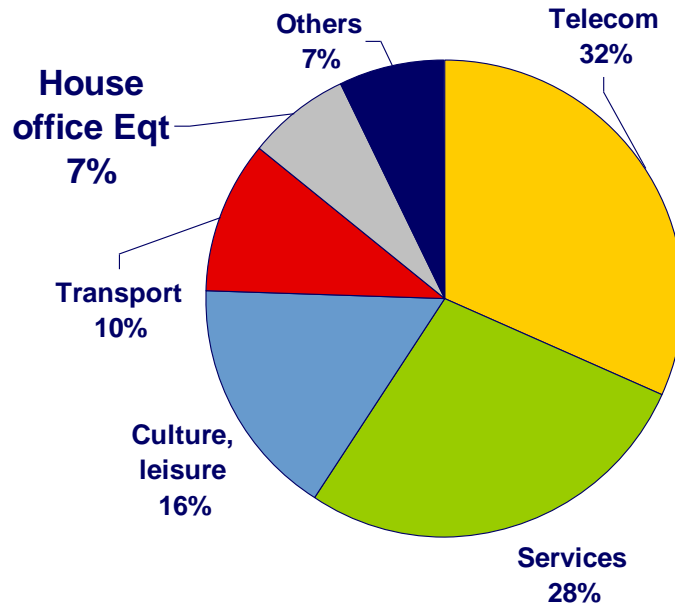
## Dailies



Source : Pige CIM 2001

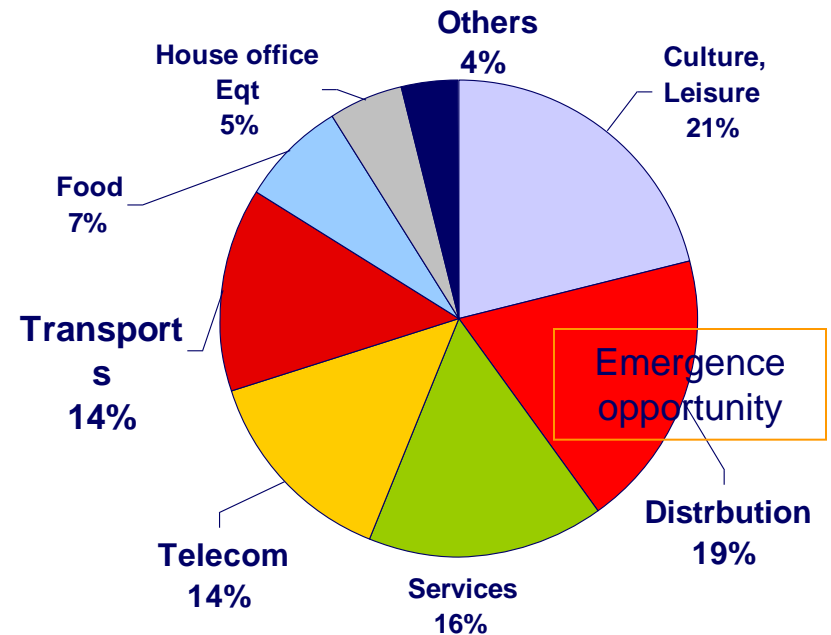
# Belgium : Sector comparaison

## Internet



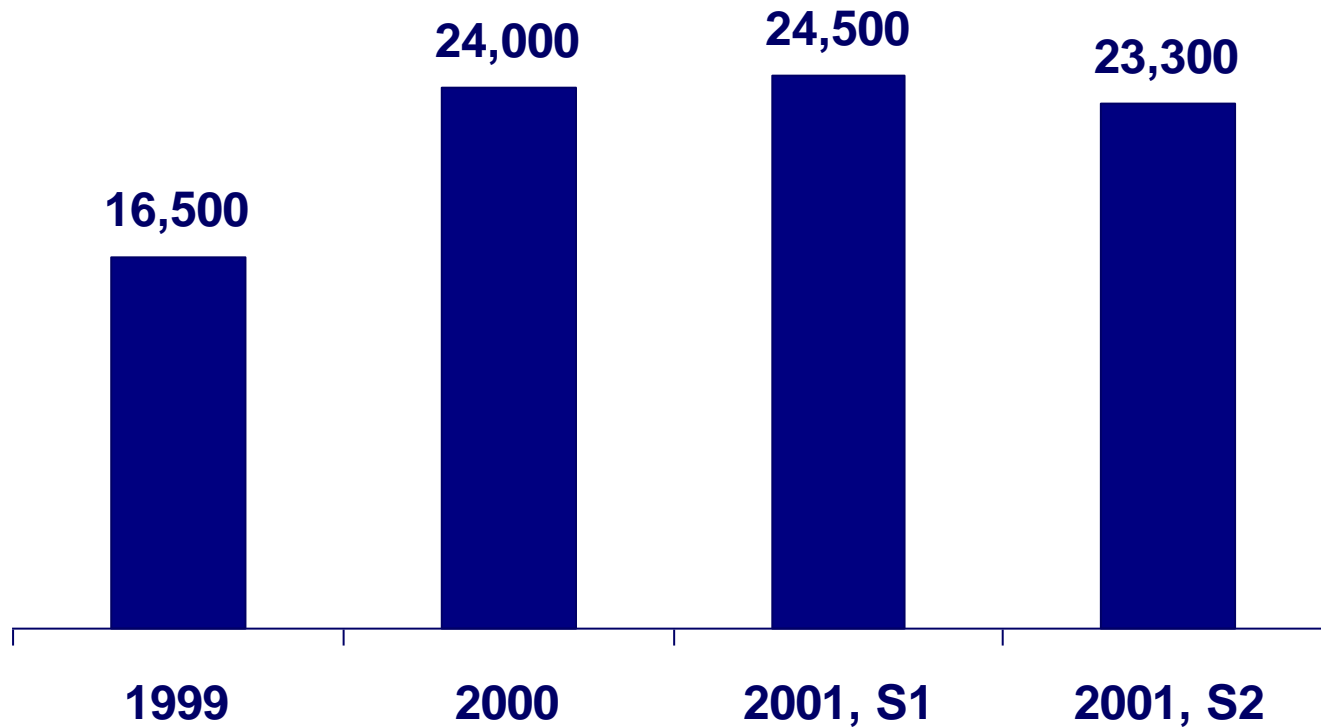
Source IAB-PWC - Belgium

## Radio



Source : Pige CIM 2001

# Belgium : Average budget per campaign has stabilised (in euros)



Source IAB-PWC - Belgium

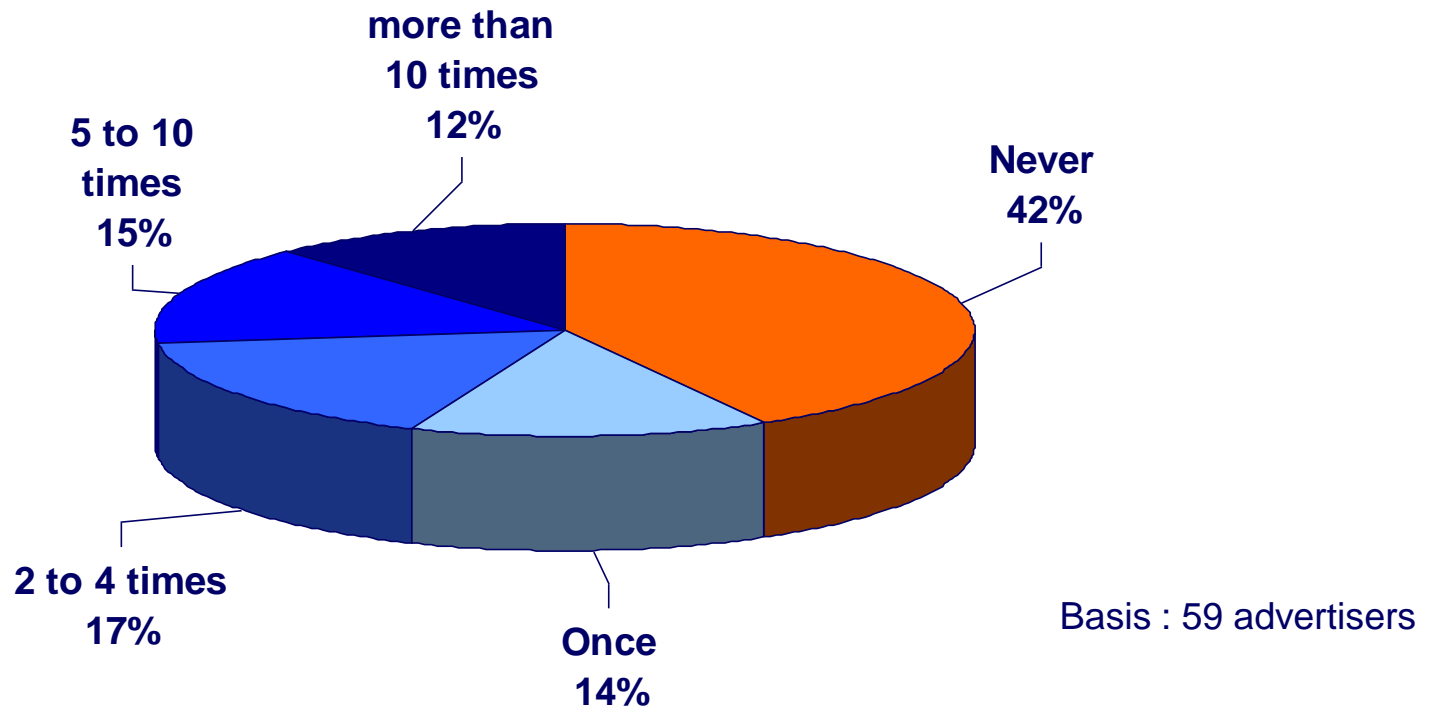
## **6. Perception of online advertising by media-planners & advertisers (Belgium)**

# Internet perception in Belgium

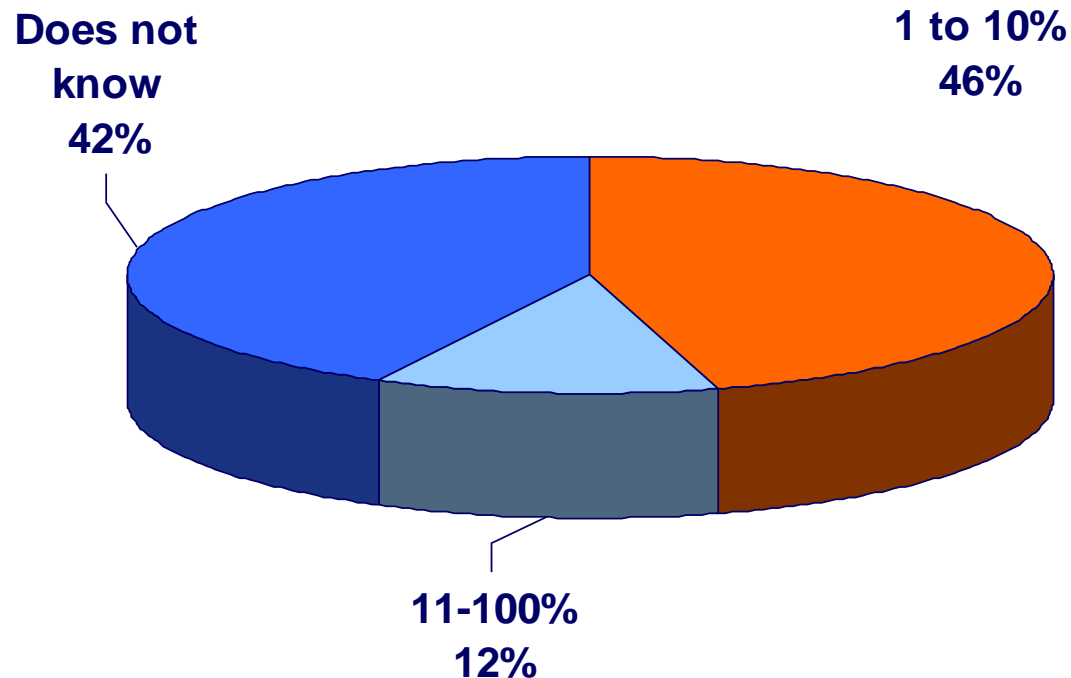
- Study carried out by IAB Belgium & TNS
- In depth interview of more 120 avertisers & traditionnal media planners
  - ▶ Internet use in the past
  - ▶ Perception of internet alone
  - ▶ Perception of Internet Vs other media
  - ▶ Their future use of Internet as an advertising Medium

# Use of internet as an advertising medium

How many times have you used internet as an advertising medium in one of your campaigns ?

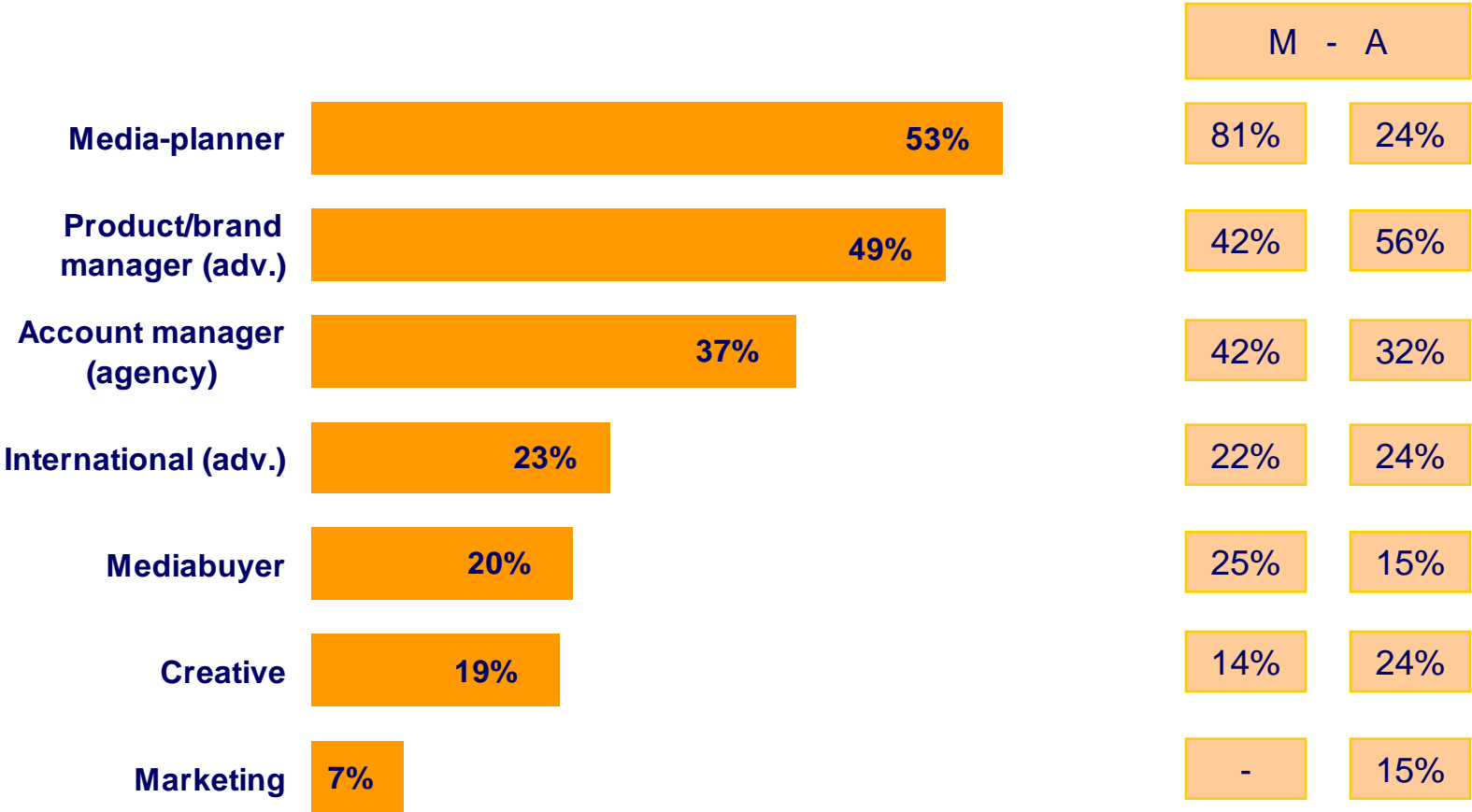


# Which % of your advertising budget was allocated to Internet ?

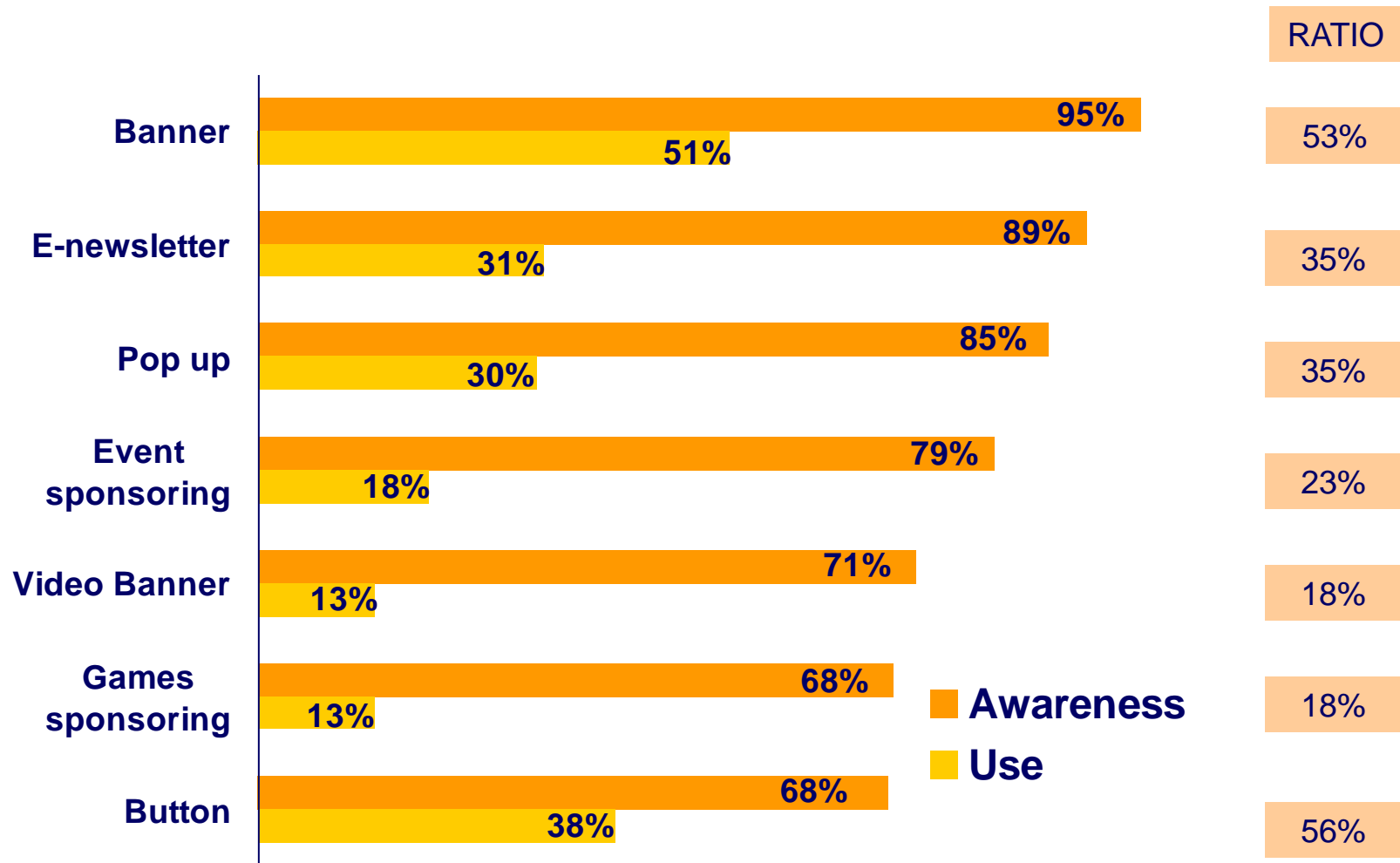


Basis : 33 advertisers was have used internet  
The question refers to the global advertising budget, not only media space

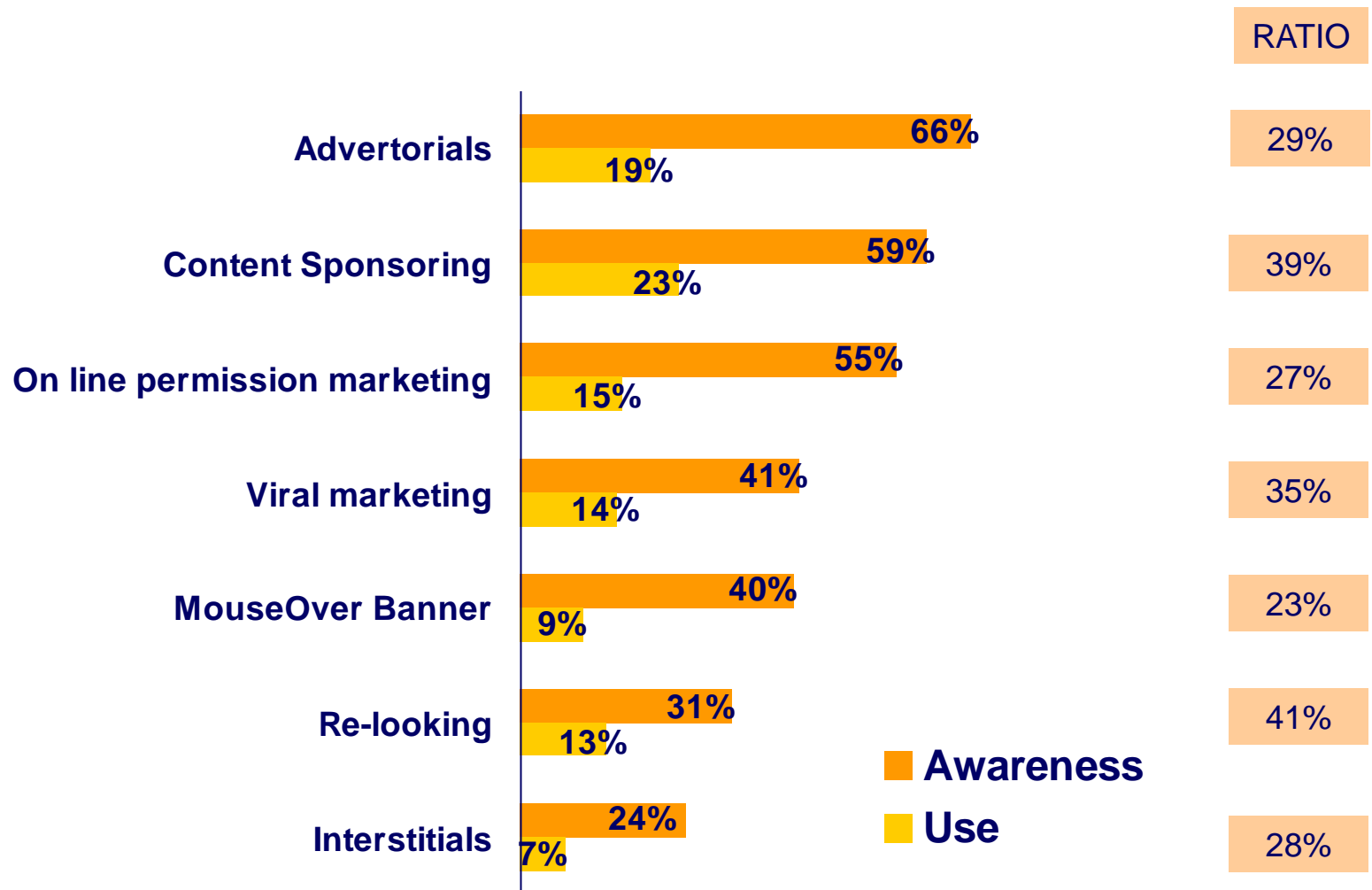
# In your last Internet campaign, who has recommended to use Internet ?



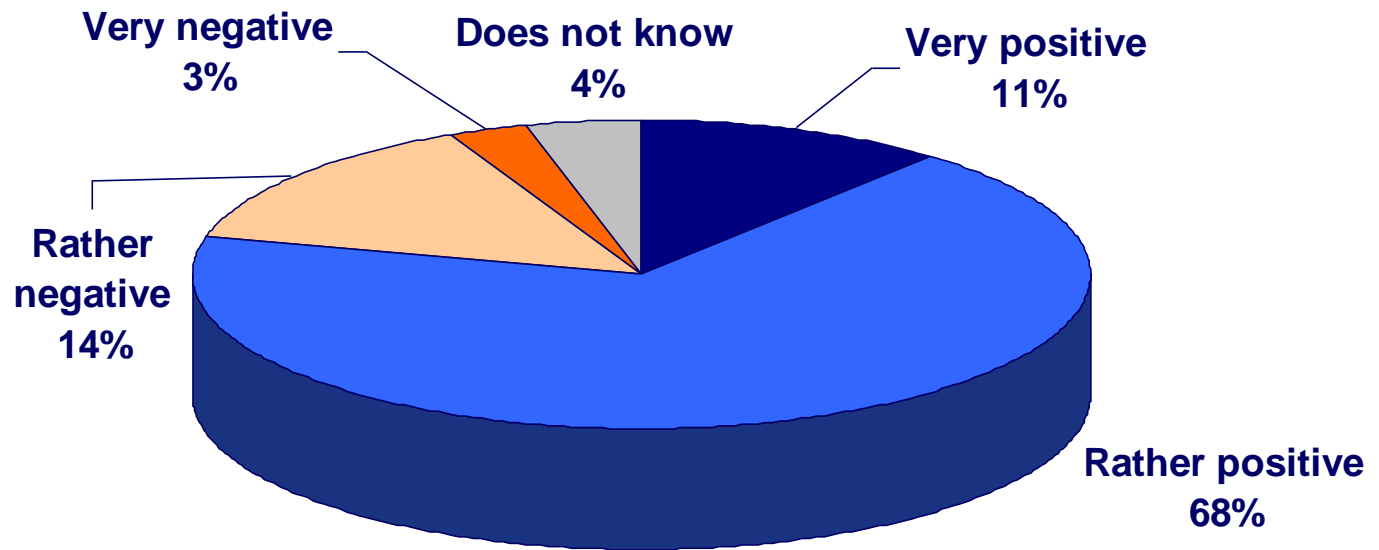
# Advertising formats



# Advertising formats



# How do you evaluate your various Internet advertising experiences ?



Basis : 70 individuals

# Media choice criteria

## Important for 60% of respondents

- Adapted to build image
- Allows targetting to product users
- Loyal audience
- Adapted to memorize advertising message
- Adapted to launch a product
- Allows demographic targetting
- Large net audience
- Credible for users
- Adapted to show a product
- Adapted to argue and explain
- Trustable audience figures
- Transparent pricing
- High quality (re)production techniques

## Important for 40 to 60% of respondents

- Adapted to announce promotions
- Offers many creative techniques
- Low entry cost
- Allows geographic targetting
- Strong titles / vehicules
- Short booking deadlines
- Adapted to convey emotion
- Good image
- Low technical cost
- Adapted to announce an event
- Sensible QUALITATIVE studies

## Important for less than 40% of respondents

- In which advertising is not irritating
- Allows users to react immediately  
(Interactivity)

- Not ranked...
- Vehicules with a clear image
- Offers QUANTITATIVE information
- Allows to quantify response rate

# Average internet score (10=max)

	TOTAL				Used internet		
		MEDIA-PLAN.	Adv	NL.	FR	Yes	No
Allows users to react immediately (Interactivity)	9,0	9,0	9,0	9,1	8,8	9,1	8,9
Allows to quantify response rates	8,1	8,3	8,0	8,3	7,9	8,3	7,9
Many creative techniques available	7,8	7,9	7,7	7,8	7,8	7,9	7,6
Short booking deadlines	7,6	7,6	7,6	7,7	7,5	7,6	7,6
Offers QUANTITATIVE information	7,0	6,9	7,2	7,0	7,1	7,2	6,8
+ High quality of technical production or reproduction	6,9	7,2	6,7	7,2	6,6	7,1	6,7
+ Adapted to argue and explain	6,8	6,5	7,2	7,0	6,7	6,9	6,7
Low entry cost	6,7	6,7	6,7	6,7	6,7	6,8	6,6
Low technical cost	6,7	6,8	6,5	6,8	6,5	6,7	6,7
+ Adapted to show a product	6,7	6,6	6,9	7,2	6,1	6,9	6,6

+ : important criteria for more than 60% of respondents

# Average internet score (10=max)

	TOTAL					Used Internet	
		MEDIA-PLAN.	ANN.	NL.	FR	Yes	No
+ Allows targetting towards a sepecific socio-demographic target	6,6	6,8	6,4	6,6	6,6	6,5	6,7
+ Allows targetting towards users of a specific product	6,6	<u>7,0</u>	<u>6,2</u>	6,7	6,6	6,8	<u>6,3</u>
+ Is credible for users	6,4	<u>6,1</u>	<u>6,7</u>	6,5	6,3	6,5	6,2
Adapted to announce an event	6,2	6,2	6,2	6,3	6,0	6,2	6,2
Has a good image	6,1	6,2	6,0	5,9	6,2	6,3	<u>5,8</u>
Adapted to announce promotions	6,0	6,0	6,0	6,2	<u>5,7</u>	6,1	5,8
+ which audience figures are trustable	5,6	5,8	5,5	5,4	<u>5,9</u>	5,6	5,6
Which offers sensible QUALITATIVE studies	5,6	5,6	5,6	5,7	5,5	<u>5,9</u>	<u>5,3</u>
Which offers vehicules with a clear image	5,5	5,7	5,3	5,5	5,4	<u>5,8</u>	<u>5,1</u>

+ : important criteria for more than 60% of respondents

# Average internet score (10=max)

	TOTAL					Used internet	
		MEDIA-PLAN.	ANN.	NL.	FR	Yes	No
+ with a loyal audience	5,3	5,2	5,3	5,5	5,0	5,2	5,3
+ which pricing is transparent	5,2	5,2	5,3	5,0	5,5	5,1	5,4
in which advertising does not irritate	5,1	5,2	5,1	5,0	5,2	5,0	5,3
which audience is big	5,0	5,0	5,1	5,4	4,6	5,1	5,0
+ Adapted to memorise an advertising message	4,9	4,8	4,9	5,2	4,4	4,9	4,8
+ Which titles / broadcasters are strong	4,8	5,2	4,5	5,2	4,4	5,1	4,4
Adapted to convey emotion	4,7	4,4	5,0	5,0	4,3	4,8	4,6
+ Adapted to launch a product	4,5	4,5	4,6	4,7	4,3	4,7	4,2
Which allow geographic targeting	3,8	4,1	3,5	3,7	3,9	4,1	3,4

+ : important criteria for more than 60% of respondents

# Mediaplanning and internet

(% who agrees with sentences)

	TOTAL					Used Internet	
		MEDIA-PLAN.	ANN.	NL.	FR	OUI	NON
Internet can only be used as a complementary medium	78%	72%	83%	75%	80%	74%	82%
With internet, you can really evaluate campaigns' impact	68%	72%	64%	67%	71%	70%	66%
The cost per contact of internet is much lower than for other media	54%	57%	51%	52%	57%	54%	54%
Audience figures are weak	52%	57%	46%	55%	47%	51%	52%
Advertising on internet is technically settled	46%	48%	44%	42%	51%	43%	50%
The sales houses commercial offer is transparent	27%	26%	27%	22%	33%	26%	28%
All sales houses have an equivalent degree of professionalism	20%	20%	20%	20%	20%	14%	28%
Internet mediaplanning can be done by any media-planner and does not require a specialised media-planner	16%	18%	14%	14%	18%	13%	20%
Advertising on Internet has more impact than advertising on other media	8%	3%	14%	9%	8%	10%	6%

# Advertisers vs media planners

**Advertisers are globally more positive about internet than media-planners. Especially regarding :**

- ▶ **Internet offers many creative techniques (63% vs 51%)**
- ▶ **Orientation towards a group of product users (49% vs 33%)**
- ▶ **Adapted to argue & explain (41% vs 20%)**
- ▶ **Adapted to announce an event (27% vs 15%)**
- ▶ **Credible towards its users (22% vs 10%)**

# Internet vs other media

<p><b>Internet is the # 1 medium for</b></p> <ul style="list-style-type: none"> <li>▶ Immediate reaction (Interactivity)</li> <li>▶ Quantifying response rate</li> <li>▶ Offering many creative techniques</li> </ul>	<p><b># 2</b> Radio Mag TV</p>	<p><b># 3</b> TV Daily Mag</p>
<p><b>Internet is # 2 for</b></p> <ul style="list-style-type: none"> <li>▶ Low entry cost</li> <li>▶ Short booking deadlines</li> <li>▶ Product user targeting</li> </ul>	<p><b># 1</b> Radio Daily Mag</p>	<p><b># 3</b> Free sheet Radio TV</p>
<p><b>Internet is # 3 for</b></p> <ul style="list-style-type: none"> <li>▶ Low technical cost</li> <li>▶ Demographic targeting</li> </ul>	<p><b># 1</b> Daily Mag</p>	<p><b>#2</b> Radio Daily</p>

# Internet vs other media

<p>But, Internet is ranked # 7 for</p> <ul style="list-style-type: none"> <li>▶ <b>Good image</b></li> <li>▶ <b>Credible for user</b></li> <li>▶ <b>Vehicules offer a clear image</b></li> <li>▶ <b>Strong vehicules</b></li> <li>▶ <b>Good memorization</b></li> <li>▶ <b>Conveys emotion</b></li> </ul>	<p><b># 6</b></p> <p>Radio</p> <p>Outdoor</p> <p>Radio</p> <p>Movie</p> <p>Daily/Mag</p> <p>PQ</p>	<p><b># 8</b></p> <p>Free sheet</p> <p>Free sheet</p> <p>Free sheet</p> <p>Free sheet</p> <p>Free Sheet</p> <p>Free sheet</p>
<p>Internet is last for</p> <ul style="list-style-type: none"> <li>▶ <b>Geographical targetting</b></li> <li>▶ <b>Transparent pricing</b></li> </ul>	<p><b>#6</b></p> <p>Movie</p> <p>Movie</p>	<p><b>#7</b></p> <p>Mag</p> <p>Outdoor</p>

# Internet vs television

- **Interactivity (\*)**
  - **Low entry cost**
  - **Quantification of response rate**
  - **Low technical costs**
  - **Short booking deadlines**
  - **Creative techniques available**
  - **Demographic targeting**
  - **User oriented**
  - **Adapted to argue**
  - **Adapted to convey emotion**
  - **Strong channels**
  - **Adapted to build image**
  - **Large net audience**
  - **Adapted to launch a product**
  - **Adapted to memorize a message**
  - **Adapted to show a product**
  - **Channels with clear image**
  - **High (re)production quality**
  - **Loyal audience**
  - **Trustable audience figures**
  - **Good image**
- (\*) Limited importance in media planning

# Internet vs radio

- **Interactivity (\*)**
- **Quantification of response rate**
- **Creative techniques available**
- **Orientation towards users**
- **Adapted to argue**
- **Adapted to show a product**
- **Short booking deadlines**
- **Demographic targeting**
- **Geographical targeting**
- **Strong stations**
- **Loyal audience**
- **Adapted to announce promotions**
- **Adapted to memorize a message**
- **Adapted to announce an event**
- **Adapted to launch a product**
- **Adapted to convey emotion**

(\*) Limited importance in media planning

# Internet vs dailies

- **Interactivity (\*)**
- **Creative techniques available**
- **Quantification of response rate**
- **Low entry cost**
- **User oriented**
- **High (re)production quality**
- **Demographic targeting**
- **Loyal audience**
- **Geographic targeting**
- **Credibility for readers**
- **Strong titles**
- **Adapted to announce promotions**
- **Adapted to announce an event**

(\*) Limited importance in media planning

# Internet vs magazines

- **Interactivity (\*)**
- **Creative techniques available**
- **Short booking deadline**
- **Low entry cost**
- **Quantification of response rate**
- **Low technical costs**
- **Loyal audience**
- **Titles with clear image**
- **Strong titles**
- **Geographic targetting**
- **Adapted to build an image**
- **Sensible qualitative studies**
- **Credible for readers**
- **Good image**
- **Adapted to argue and explain**

(\*) Limited importance in media planning

# Internet vs free sheets

- **Interactivity (\*)**
- **Creative techniques available**
- **Demographic targeting**
- **User oriented**
- **Geographic targeting**
- **Adapted to announce promotions**
- **Transparent pricing**
- **Low entry cost**
- **Low technical costs**

(\*) Limited importance in media planning

# Internet vs movie theatres

- **Interactivity (\*)**
- **Quantification of response rate**
- **Low technical costs**
- **Short booking deadlines**
- **Low entry cost**
- **Creative techniques available**
- **User oriented**
- **Adapted to convey emotion**
- **High (re)production quality**
- **Adapted to build image**
- **Good image**
- **Adapted to memorize a message**
- **Advertising is not irritating (\*)**
- **Adapted to show a product**
- **Media with clear image**

(\*) Limited importance in media planning

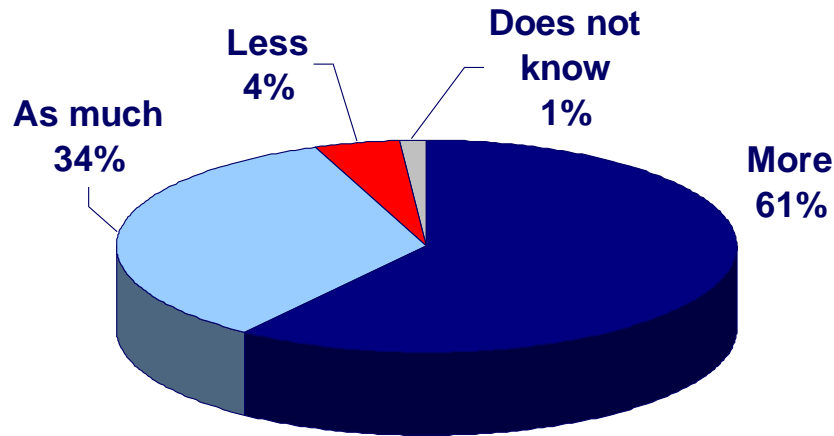
# Internet vs outdoor

- **Interactivity (\*)**
- **Quantification of response rate**
- **Low entry cost**
- **Demographic targeting**
- **Low technical costs**
- **Short booking deadline**
- **Creative techniques available**
- **Adapted to argue**
- **User orientation**
- **Geographic targeting**
- **Adapted to build image**
- **Adapted to launch a product**
- **Adapted to show a product**
- **Media with clear image**
- **Adapted to memorize a message**
- **Large net audience**
- **Good image**

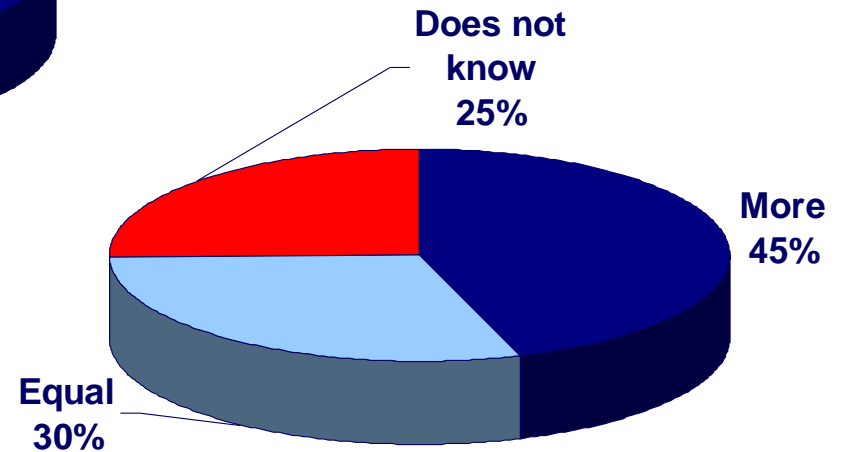
(\*) Limited importance in media planning

# In the future, will you use Internet as an advertising medium more / less...

## Has already used Internet

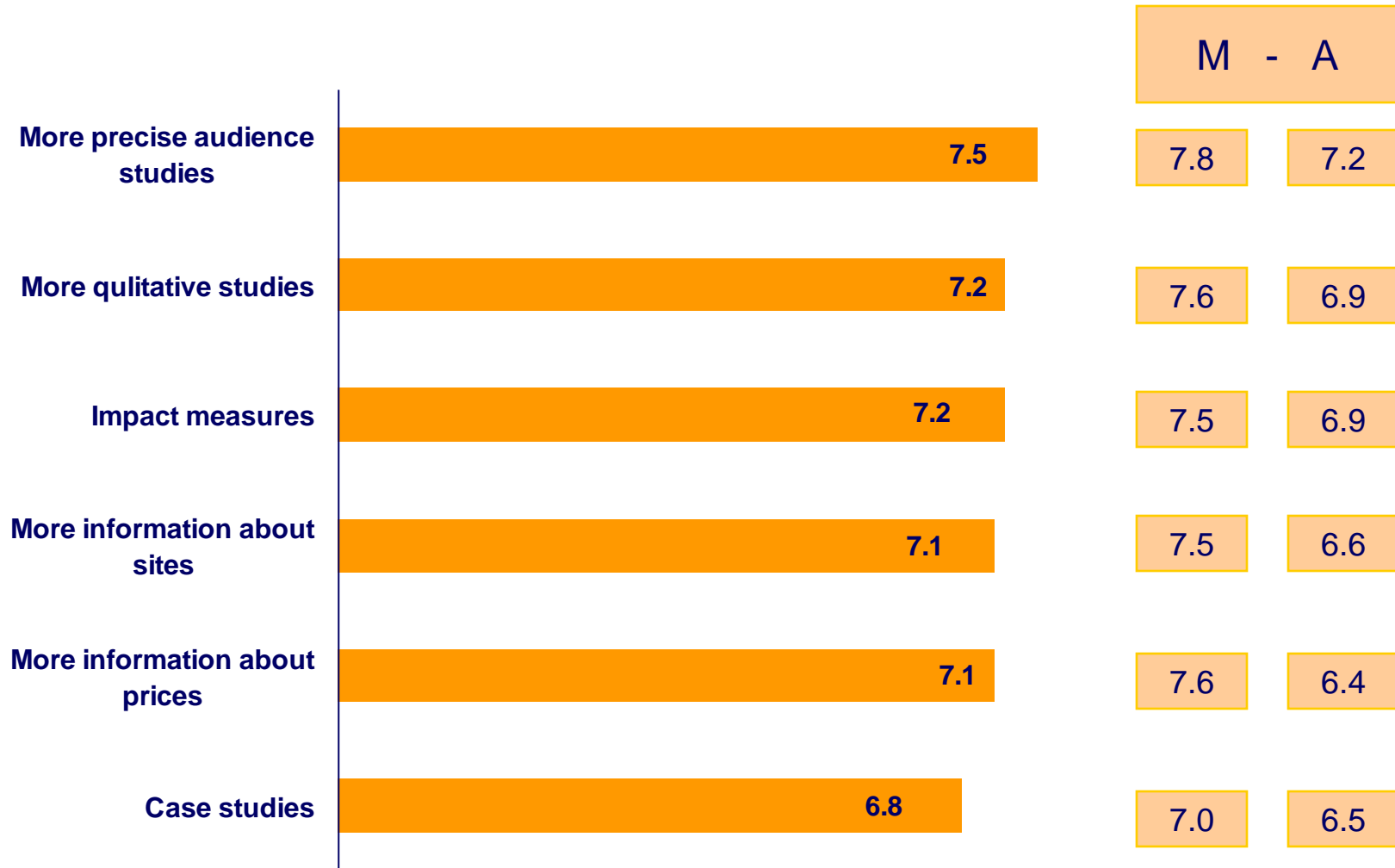


## Has never used Internet

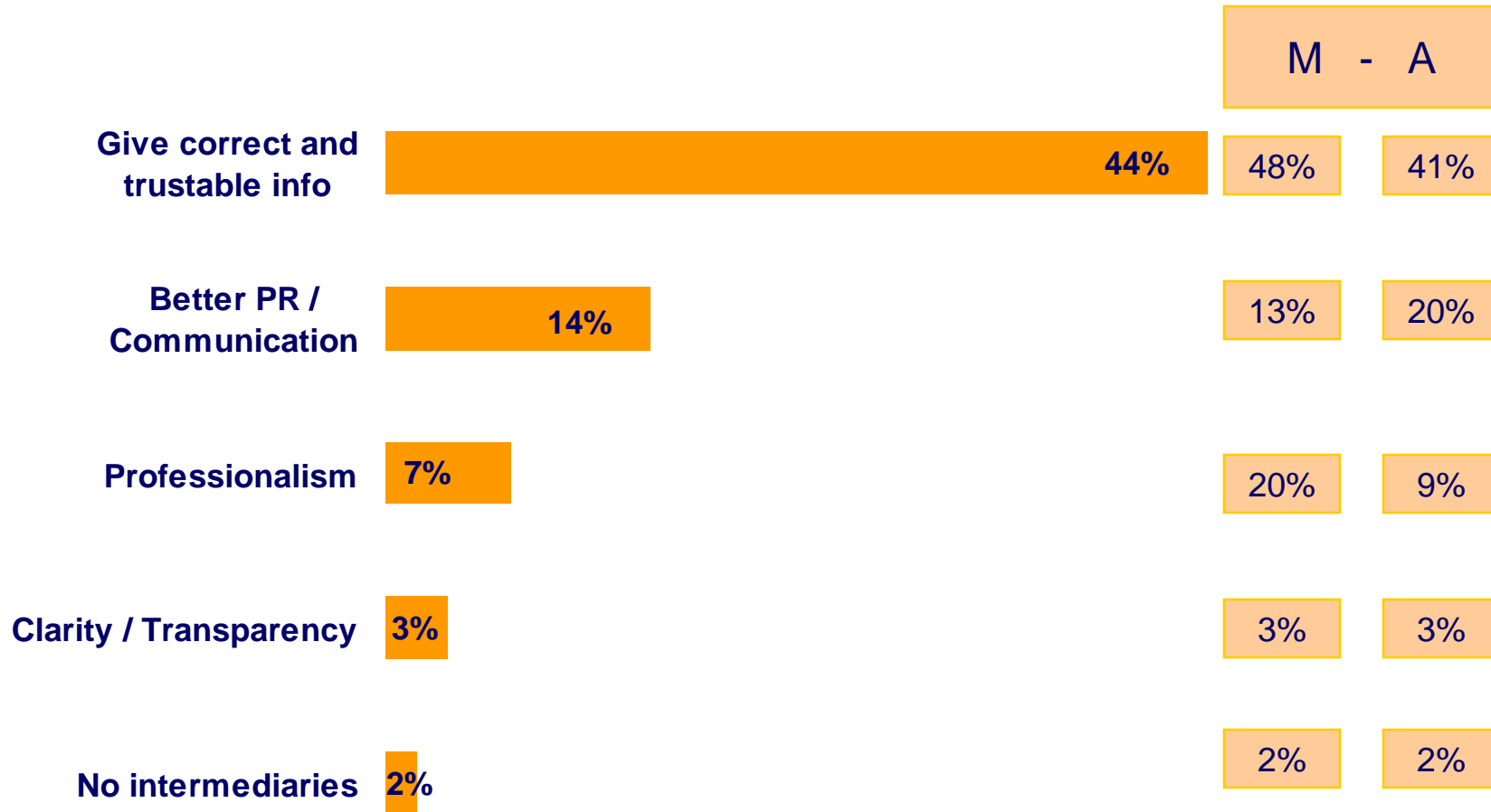


# What information would help you to chose Internet as an advertising media ?

(score from 1 to 10)



# If Internet wanted to be more attractive, what should the sales houses do ?



# Conclusion

- Strong need for education
  - ▶ Education for media-planners
  - ▶ Education for advertisers
  - ▶ Education for creative agencies
- Need for common metrics (on / off-line vocabulary)
- Pricing transparency
- Communication of IAB projects, guidelines, studies

## 7. Last trends

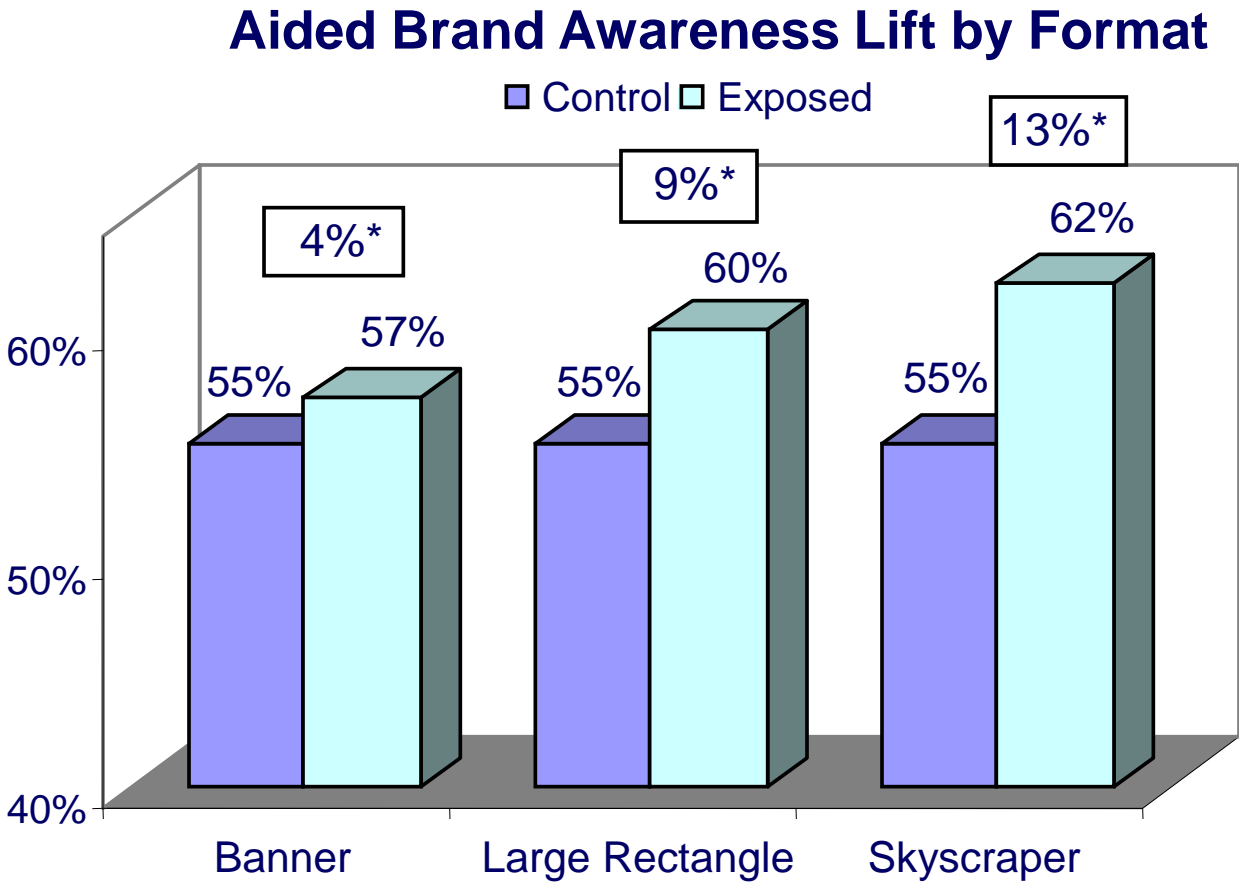
# Various ways of selling online space

- Start of Internet : impression / Page View
- 2000 : frequency capping
  - ▶ Control frequency of exposition to advertising
  - ▶ Increase reach
  - ▶ Optimize results
- 2001 : pay per click (2% of belgian investments)
  - ▶ Only 2 saleshouses sell per click (large quantity of spare space sold at low price)
  - ▶ Risk of space devalorisation
  - ▶ Reinforces the wrong position that « only clicks » are important
- 2002 : Unique Visitor
  - ▶ More homogeneity with other media
  - ▶ Coverage and OTS are notions familiar to traditionnal advertisers and media planner

# Latest trends

- Integrate Internet together with traditional media
  - ▶ Same vocabulary as off-line media (coverage, frequency)
  - ▶ Same pricing logic (bonus, rebates, promotions)
  - ▶ Even « pure online player » follow this trend
    - Opens Internet to traditional advertisers
    - Easier to deal with for media-planners
  
- Format standardization
  - ▶ Guidelines for technical specifications
  
- More case studies to convince advertisers
  - ▶ Portals study
  - ▶ Saleshouses study
  - ▶ IAB education

# Larger formats are 3-6 times more effective



Source: IAB/Dynamic Logic, June 2001

\* Statistically significant at 90%

# Larger banners work better

The size of the banner impacts

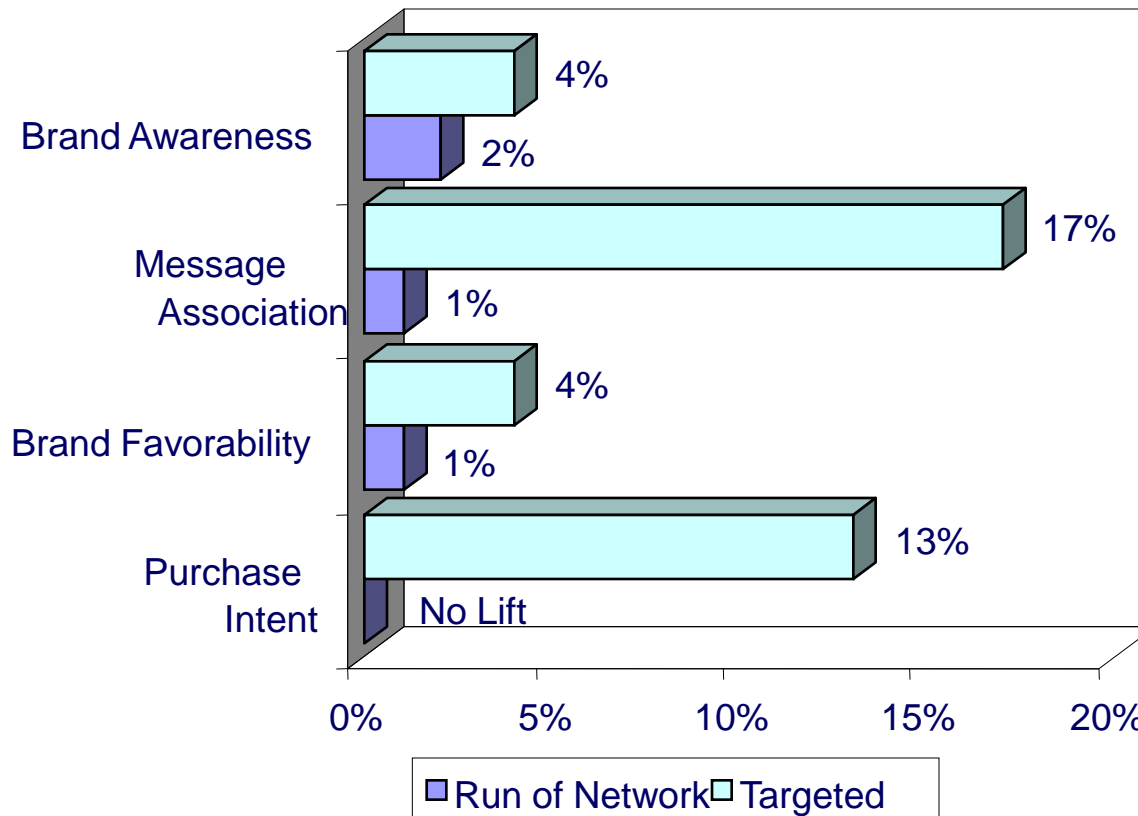
- the perceived clarity of the message
- as well as consumer desire to learn more about the products and services.

When campaign goals include improving branding metrics, use larger banner formats.

# Examine targeting on cost AND effect

Consider targeted inventory not just on price but also effectiveness

## Average Lift in Brand Metric: Targeted vs. Run of Site/Network



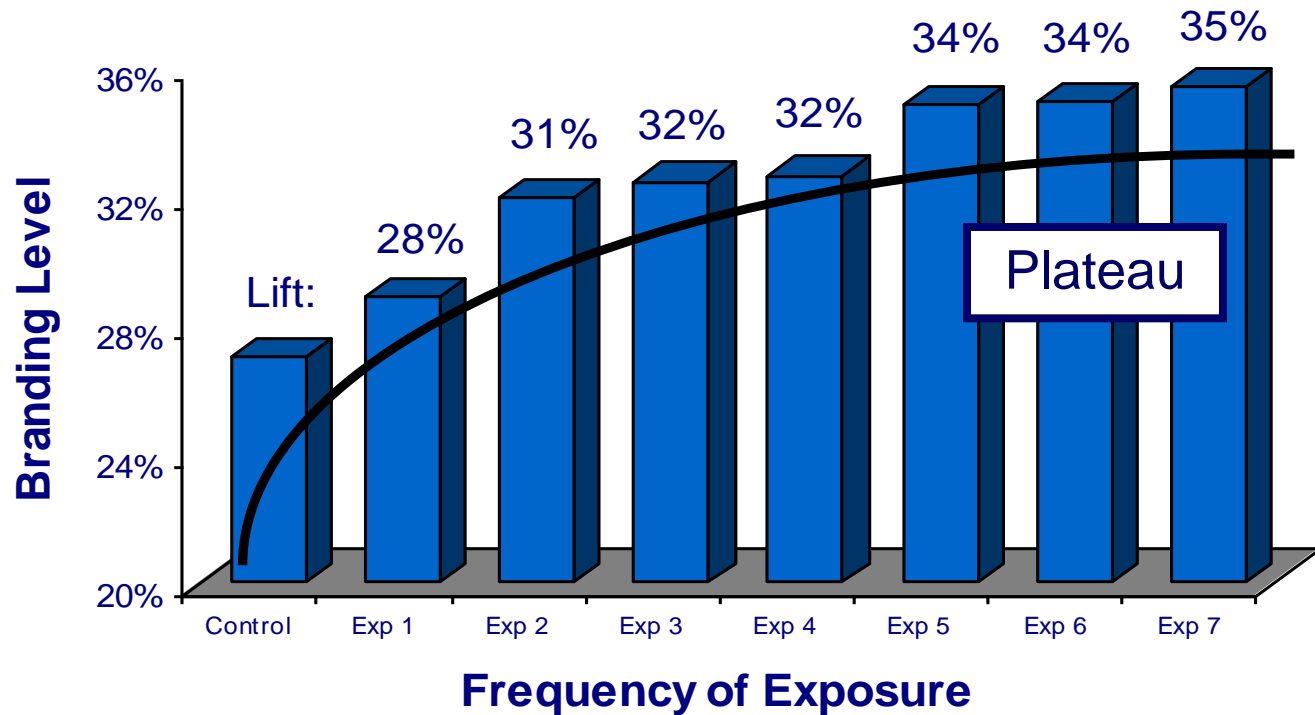
Source: Dynamic Logic MarketNorms

Source: Dynamic Logic's AdIndex data, 2002

n=13,899

# Test optimal number of exposures for each campaign as plateau may vary

## Message Association by Exposure Frequency



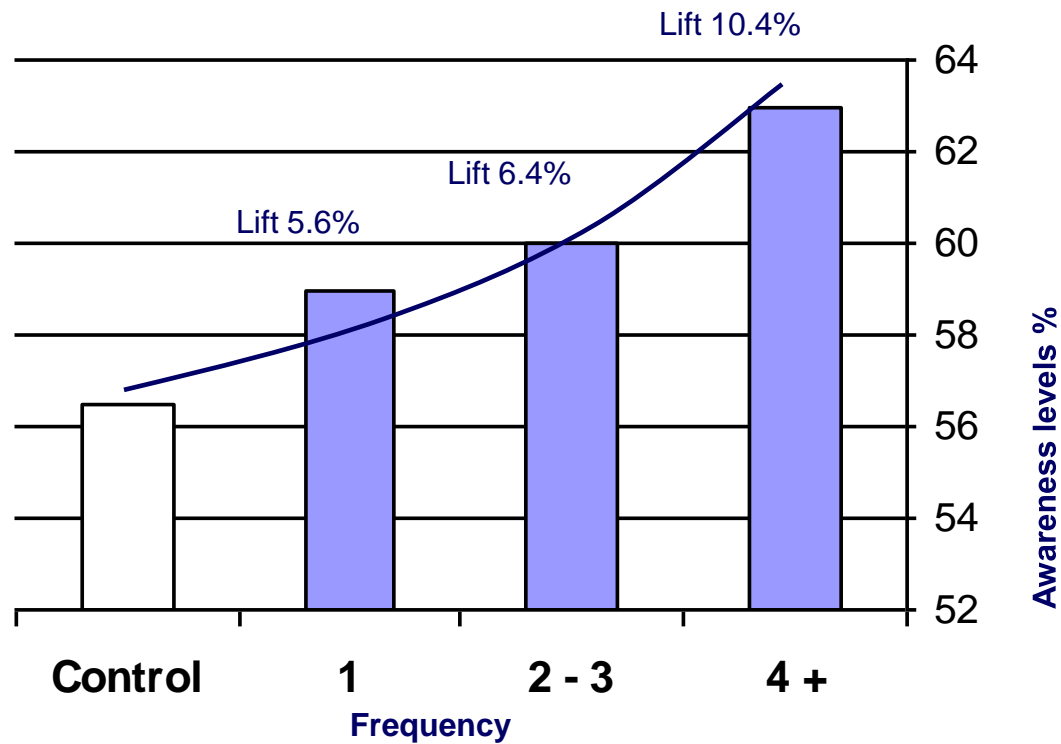
Source: *Dynamic Logic MarketNorms*

# To build awareness, do not over-use frequency caps

- Banners seen with a higher frequency have a greater impact on brand awareness than banners seen with a lower frequency.
- A “frequency cap” may be detrimental to a campaigns ability to build brand awareness.
- Do not place a frequency cap of one exposure on advertisements. Available frequency data indicates that awareness may reach its peak at five exposures.
- However, the number of exposures required depends on what is being advertised and the overall effectiveness of the creative.

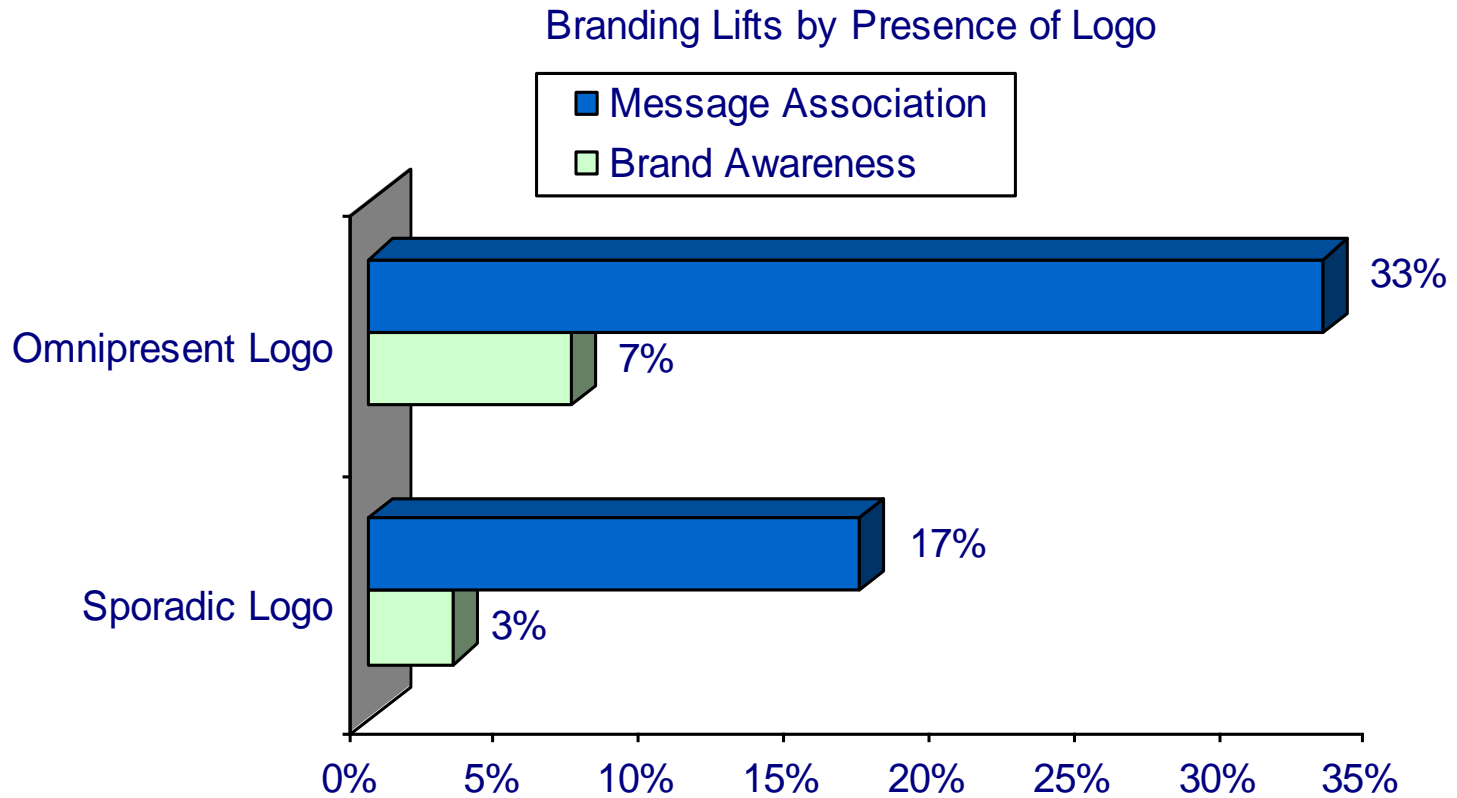
# Additional impressions add more branding value

Frequency of 4+ exposures  
doubles branding



Source: Dynamic Logic, 10/00

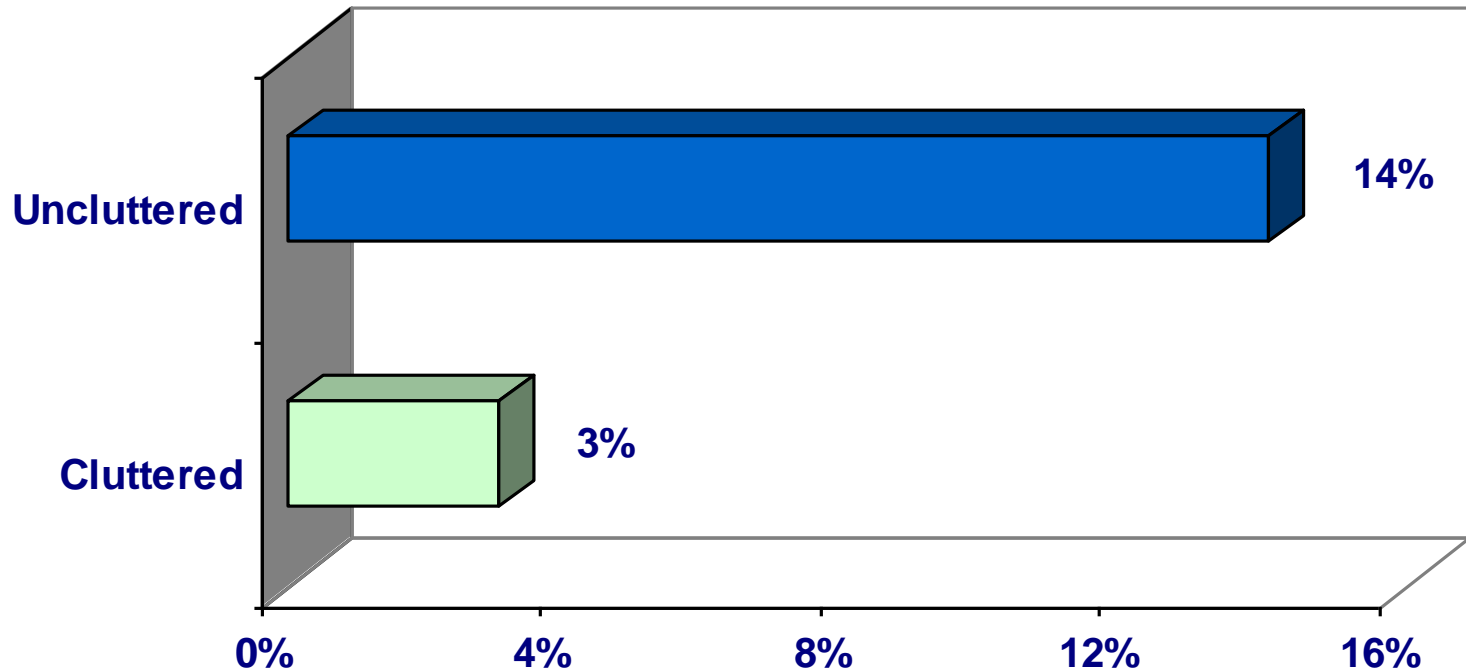
# Consistent presence of logo doubles branding results



Source: *Dynamic Logic MarketNorms*

# Cut the clutter

Brand Awareness Lift by Clutter



\*Cluttered refers to ads with 16+ elements

Source: *Dynamic Logic MarketNorms*

# Reduce banner clutter

## Use 16 or fewer items in a banner

- To increase the potential to raise brand awareness and banner recall, limit the number of elements in a banner.
- The limited time a banner provides for communicating a message requires that the banner be clear and uncluttered.
- The number of elements in the banners evaluated range from 1 – 51 with a median of 16. Designers should keep their creative elements short and to the point with no more than 16 textual or graphical elements.

# Conclusion : The 5 golden rules

- Size matters
- Target smartly
- Plan frequency
- Be bold with your logo
- Cut the clutter

**MPG**

**Discussion**

**MPG**

**Thank you**

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