

SEMINARIO DE PUBLICIDAD Y COMUNICACIÓN DIGITAL

IAB-aea

SEPTIEMBRE 15 Madrid / 17 Barcelona



© A.L.H.

Niko Muñoz

Niko.Munoz@Me.com



[@NikoMunoz](https://twitter.com/NikoMunoz)

Niko Muñoz

Niko.Munoz@Me.com

Mobile: + 34 69 565 94 02

Skype: [Niko.Munoz](#).



[@NikoMunoz](#)



A tech-savvy marketer hunting innovations by connecting customer experiences and **digital transformation developments**.

Niko has strong focus in consumer behavior and an extensive financial background. He is highly experienced in connecting the dots between customer wishes, product design, tech-specs, marketing actions and new digital business models.

For the latest 10 year, Niko headed the Global Corporate Development, at Havas Media the media division of 6th global marketing and communications group. His mission was to look outside industry boundaries to introduce digital innovations. He coordinated diversification activities expanding business into new market segments and countries. He drove acquisitions and lead partnerships to foster the digitalization of the business models. Niko was introduced to digital consumption in early 80's when he got his first computer a Sinclair ZX Spectrum 64k. For near two decades, he has been immersed in digital marketing and launching technology-related products and business. He started his full digital marketing tenure in 1997 at the leading videogames manufacturer, Electronic Arts, where he developed digital campaigns and promotions, running virtual communities and launched e-commerce and digital product sales. Prior to joining Havas, Niko developed his career in media contents area of Telefónica Group (Terra-Lycos) defining and marketing digital entertainment products and different services such as Imagenio IPTV, gaming, and e-commerce category.

Niko is a juris doctor who obtained his MBA from IESE Business School. He is pursuing his Ph.D. in Management (Marketing) with a dissertation on creating brand equity through online social networks. When he does not travel, Niko lives in Madrid with his wife and three children.

IAB TOP TENDENCIAS 2015: Televisión Conectada.

Nueva definición de TV La definición de TV se aleja del hardware para **centrarse en el contenido**. TV es cualquier contenido televisivo que veamos en cualquier dispositivo, lo que paradójicamente facilita la integración de campañas pero complica la medición de audiencias.

Más Smart TV y menos TV tradicional Sube la penetración de Smart TVs, hasta convertirse ya en la principal forma de consumir TV conectada, así como la frecuencia de uso y la homogeneización del perfil, que canibaliza a la TV tradicional.

Nuevo papel de la TV tradicional Existe una gran penetración y un alto consumo de **contenidos emitidos en TV tradicional, pero ahora bajo demanda**, lo que afectará a la saturación publicitaria y las estrategias de los canales.

Directos vs Bajo Demanda La TV tradicional cada vez se asocia más con el directo, mientras la TV conectada con el resto de contenidos bajo demanda, como cine, series o música.. **La medición de usuarios únicos plantea un reto a resolver.**

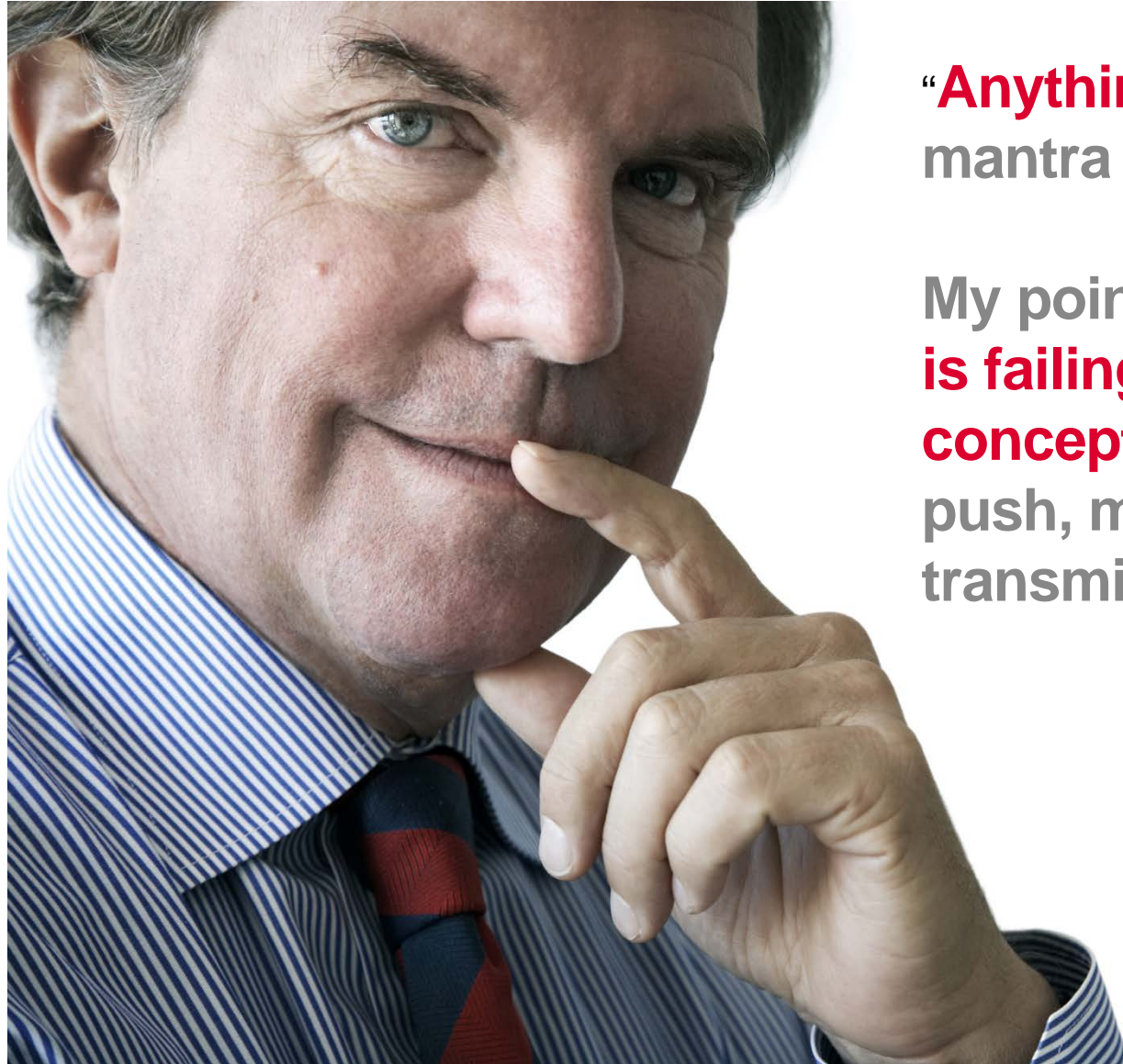
Nuevos formatos publicitarios Formatos publicitarios habituales en el mercado televisivo y el digital, **se unen a otros poco habituales**, contextuales y participativos.

Nuevos competidores globales Las propias plataformas de video y los fabricantes (Netflix, Youtube, Apple TV, Samsung) están empezando a crear o adquirir sus propios contenidos. A largo plazo, endurecerá la competencia entre empresas locales y globales.

Subvención de terminales Así como los operadores subvencionaron los Smartphones y facilitaron el desarrollo de toda la economía ligada a ellos, se podría dar algún tipo de acción que facilitara la incorporación de nuevos usuarios a la TVC, ya sea por fabricantes, proveedores de contenido, o de cable o



Opening Guru quote



“Anything, anywhere, anytime. When I hear this mantra I try not to choke (...)

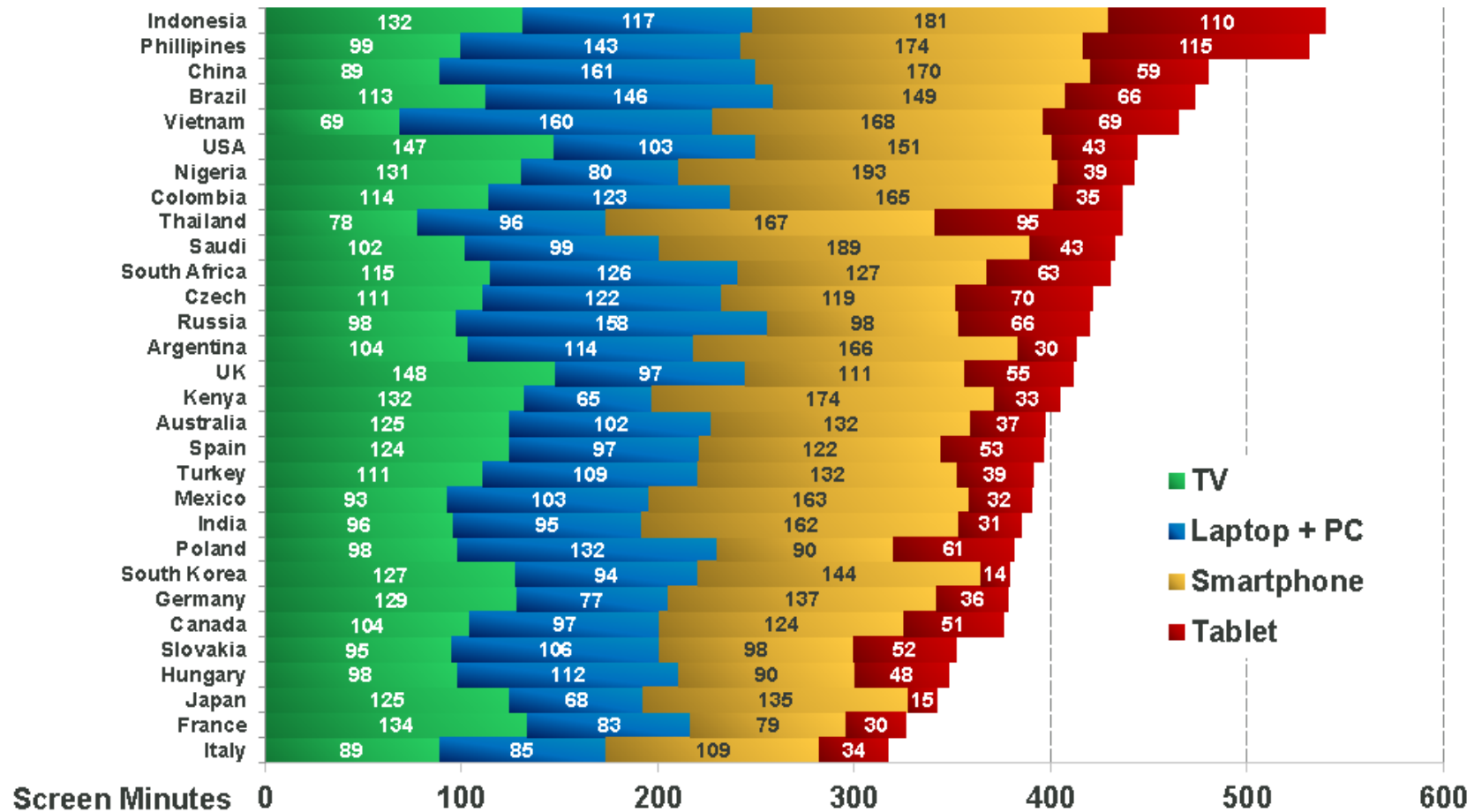
My point is simple: **the broadcast model is what is failing. "On-demand" is a much bigger concept** (...) It's consumer pull versus media push, my time -- the receiver's time -- versus the transmitter's time”.

Nicholas Negroponte
Professor of Media Arts and Sciences
Chairman Emeritus, MIT Media Laboratory

Copyright **1994**, WIRED Ventures Ltd
All Rights Reserved.

Smartphones = Most Viewed / Used Medium in Many Countries, 2014

Daily Distribution of Screen Minutes Across Countries (Mins)



@KPCB

Source: Milward Brown AdReaction, 2014.

Note: Survey asked respondents "Roughly how long did you spend yesterday watching television (not online) / using the internet on a laptop or PC / on a smartphone or tablet?" Survey respondents were age 16-44 across 30 countries who owned or had access to a TV and a smartphone and/or tablet. The population of the 30 countries surveyed in the study collectively represent ~70% of the world population.

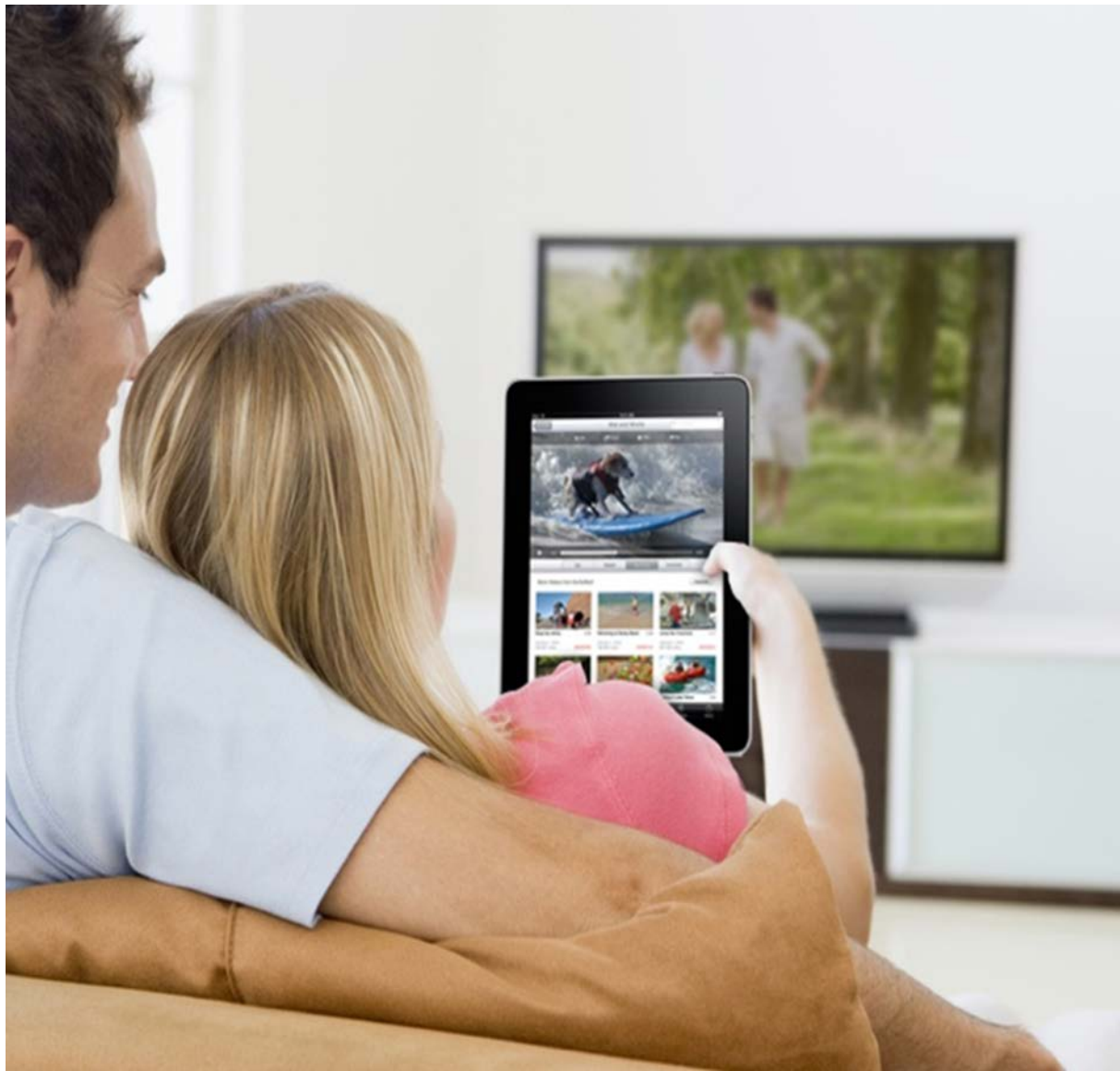
96

Source: <http://www.kpcb.com/internet-trends>







@NikoMunoz

Almost a third of Affluent Europeans own all three devices



The number has more than tripled in 2 years.

EMS Europe - Device ownership , 21 countries			
	EMS EU release 2012	EMS EU Release 2013	EMS EU release 2014
	94%	92%	92%
	44%	62%	70%
	11%	21%	35%
	8%	16%	28%

Ipsos EMS Affluent Survey interviewed over 28,000 Europeans across 21 countries in 2013, each of whom was screened to ensure they passed certain minimum household income thresholds established as representing the Top 13% population.



[@NikoMunoz](#)

Users clamoring for more TV shows and movies. Streaming frequency was highest in Italy (73%), Spain (71%) and the U.S. (66%) of consumers streaming video to their tablets **2-3 times a week** or more ¹. According to The Diffusion Group's forecast, **by 2020 nearly half of all video viewing will be happening via an application** dedicated to a specific video service².



Aside strategic bells and whistles, **facilitate consumer's strong appetites** for premium cross-device contents & services and **accessibility to audiences for advertisers.**

Source: 1.- Rovi Mobile streaming survey 2013.

2.- The Diffusion Group July 2013 <http://tdgresearch.com/the-future-of-tv-is-an-app-no-seriously/>



@NikoMunoz

Tablets becoming main device for personal catch-up TV



Newly released data from Kantar Media's syndicated study *FuturePROOF*, shows that **45% of all UK adults now have a tablet** compared to 32% a year ago, and 36% at the end of 2013. The highest penetration is among 35-44s where 58% of adults now have at least one tablet in their home. **Presence of children is the strongest driver of this**, with 69% of parents of school age children having a tablet at home.

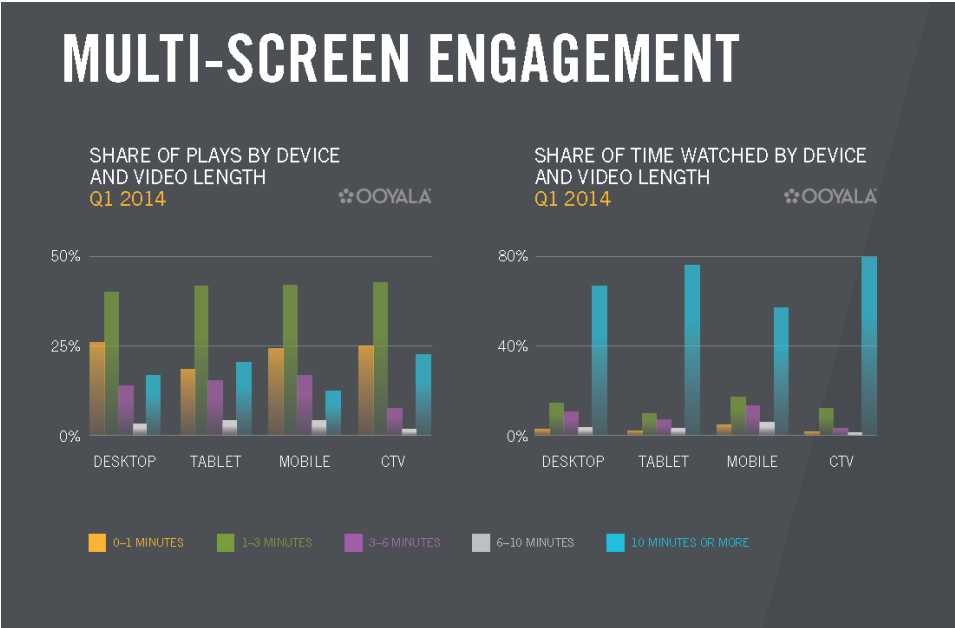
The increasing ubiquity of tablets is also changing their role. More than four out of ten users now live in a home with more than one tablet (up six percentage points in the last six months). Consequently, **tablets are moving from being a shared device to an increasingly personal one**, opening up new content and advertising opportunities for targeting and engaging specific users much more effectively.

Tablets are more likely than smartphones to be used for watching or catching up on TV programs or film, YouTube, or gaming; anything where a larger, better screen will enhance the experience. Fewer users are taking their tablets out of their homes with just 8% using their tablet out-of-home every day, and **44% never taking their tablet out the front door**.

Premium content plays well regardless screen size.



In Q1, **48% of video sessions on tablets were with videos of 30 minutes or longer** (27% of which was 60+ minute content and 21% 30–60 minute content); mobile phones saw a 35% share, split almost equally between 60+ minute content and 30–60 minute content; and computers saw a 34% share, with 30–60 minute content at 24% and 60+ minute content at 10%



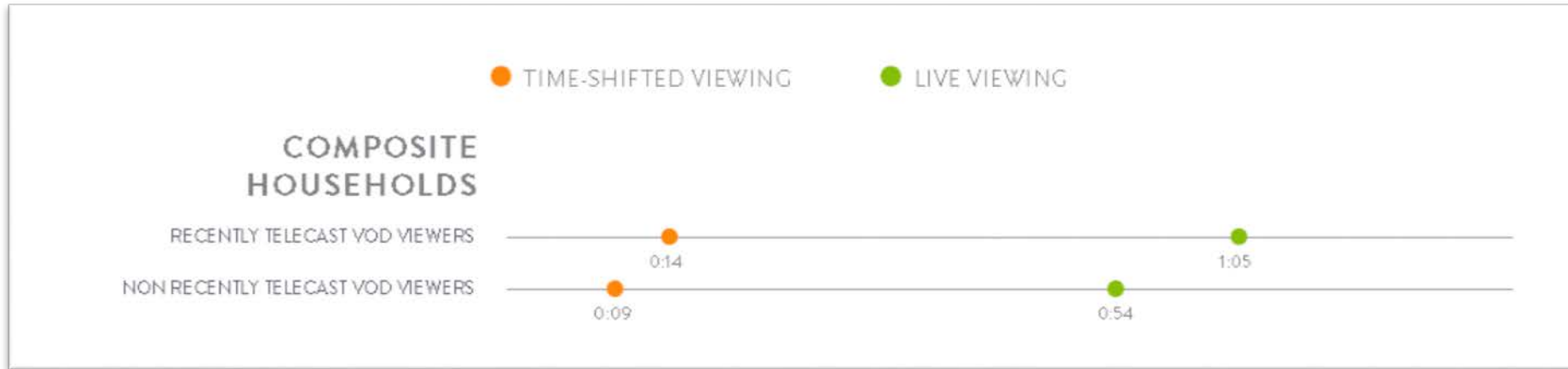


“Kids have come to think of TV as something they carry around with them. Parents meanwhile, like having access to on-demand entertainment.”

“Seven out of 10 kids aged two to 14 use app-capable devices like tablets and phones. Three out of four US kids under the age of eight use smart devices, and more than a third of US kids under two have used a smart device

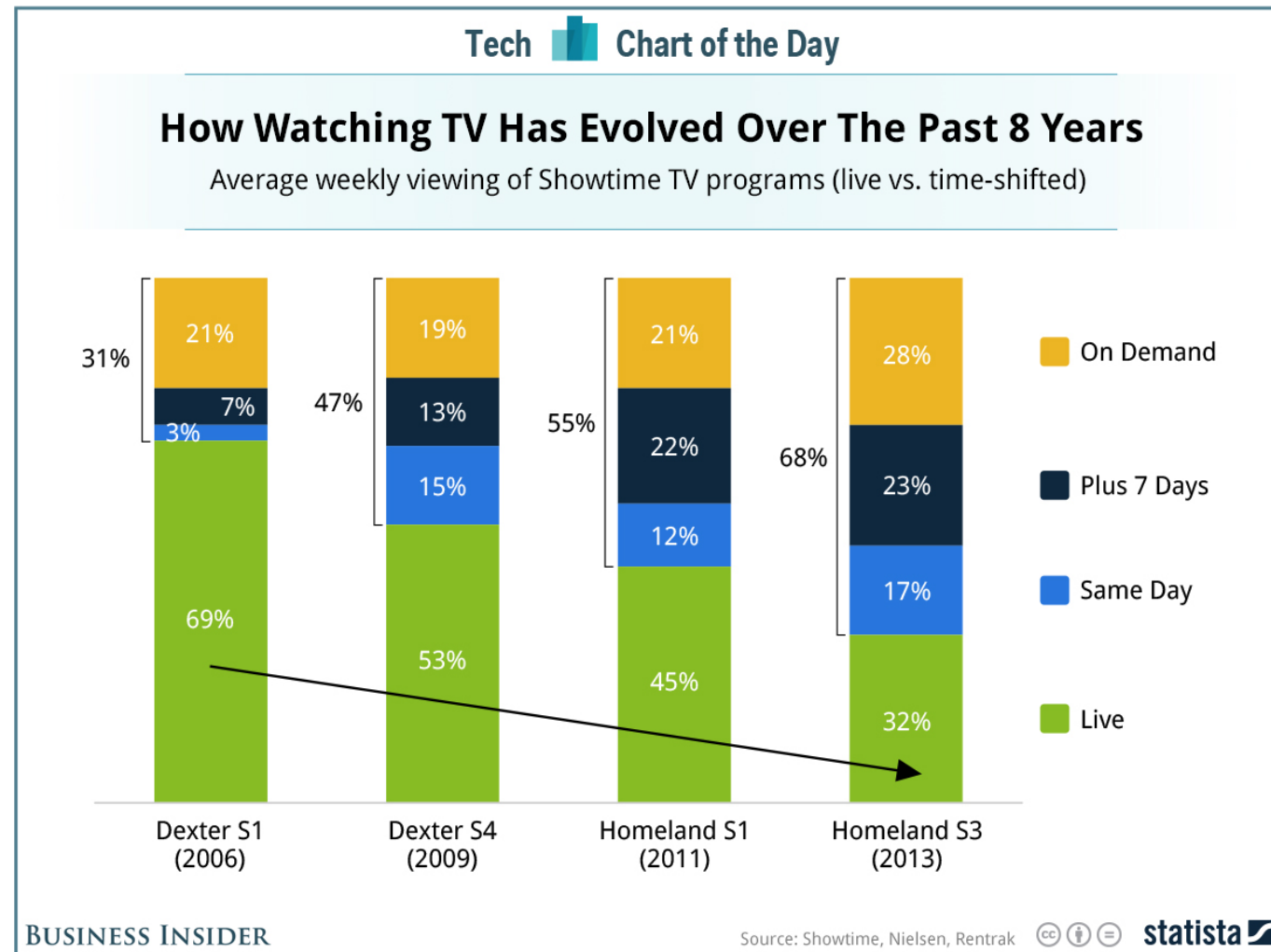
Anne Sweeney Co-Chairman, Disney Media Networks and President, Disney•ABC Television Group at Financial Times Digital Media Conference in London, March 2014.

Video on Demand Users Watch Twenty Percent More Live TV Than Non-VOD Users



“The great news for advertisers looking to connect with viewers is **that Video On Demand users of all ethnicities actually watch more TV—live or otherwise!**” shared Dounia Turrill, SVP Insights, Nielsen. “As we saw in this year’s Upfronts, today’s viewers are making device and platform choices that have a profound impact on the meaning of television and video. Americans continue to watch over five hours of traditional television per day. However, **daily time spent watching time-shifted content has continued to rise, as has using the Internet on a computer and using a mobile device.** With Nielsen incorporating mobile viewing in traditional television ratings as well as digital ratings in the fall, next year’s Upfronts and Newfronts will be fueled by new data. ”

Are we facing “The death of watching live tv” as BI suggests?

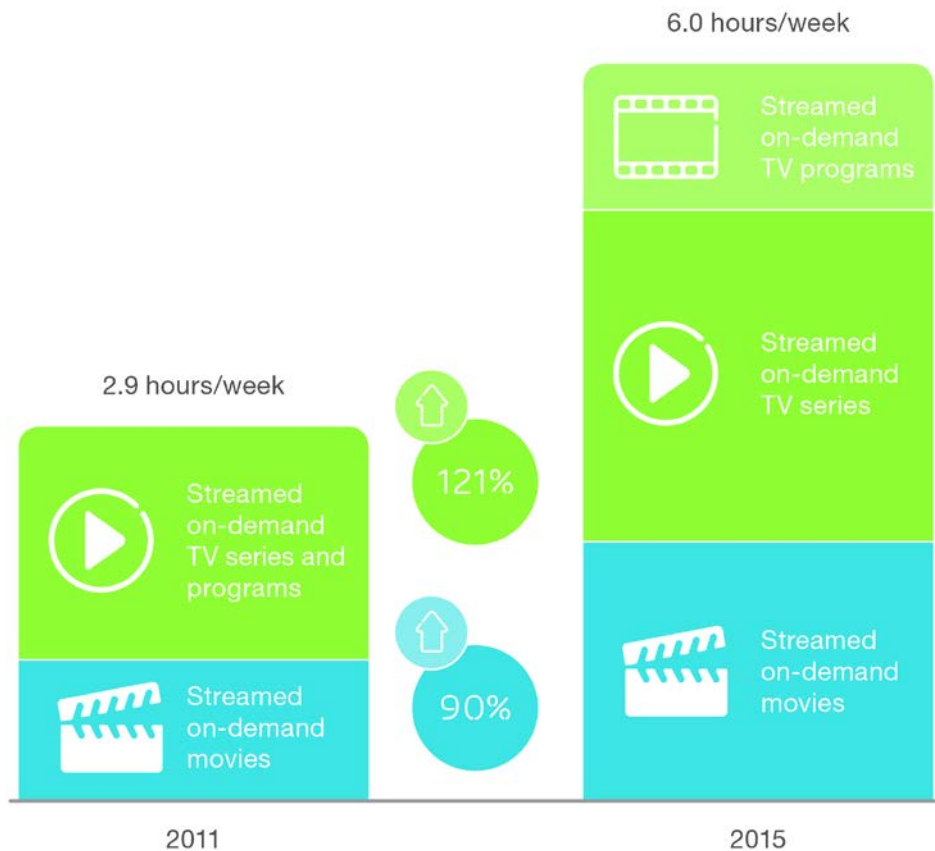


Ericsson Consumer Lab TV & Media Report 2015:

35 percent of all TV, video viewing now watched on-demand

- every third viewing hour now spent watching on-demand TV and video
- Report reveals a 71 percent increase in watching video on smartphones since 2012; nearly two thirds of teenagers' total TV and video viewing time spent on a mobile device

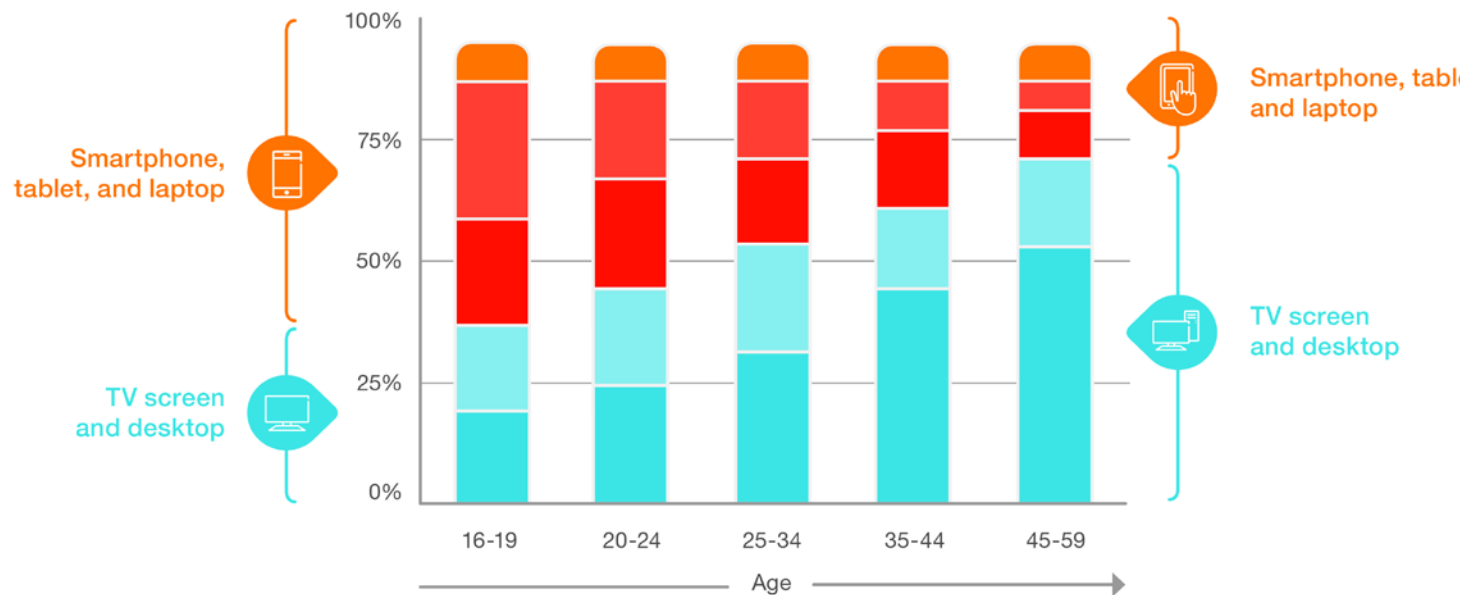
The increase in watching on-demand TV series and movies



Source: Ericsson ConsumerLab, TV and Media 2011 and 2015
Base: At least weekly viewers of video/TV with broadband at home, aged 16–59

Share of total TV time by age group, measured on respective device

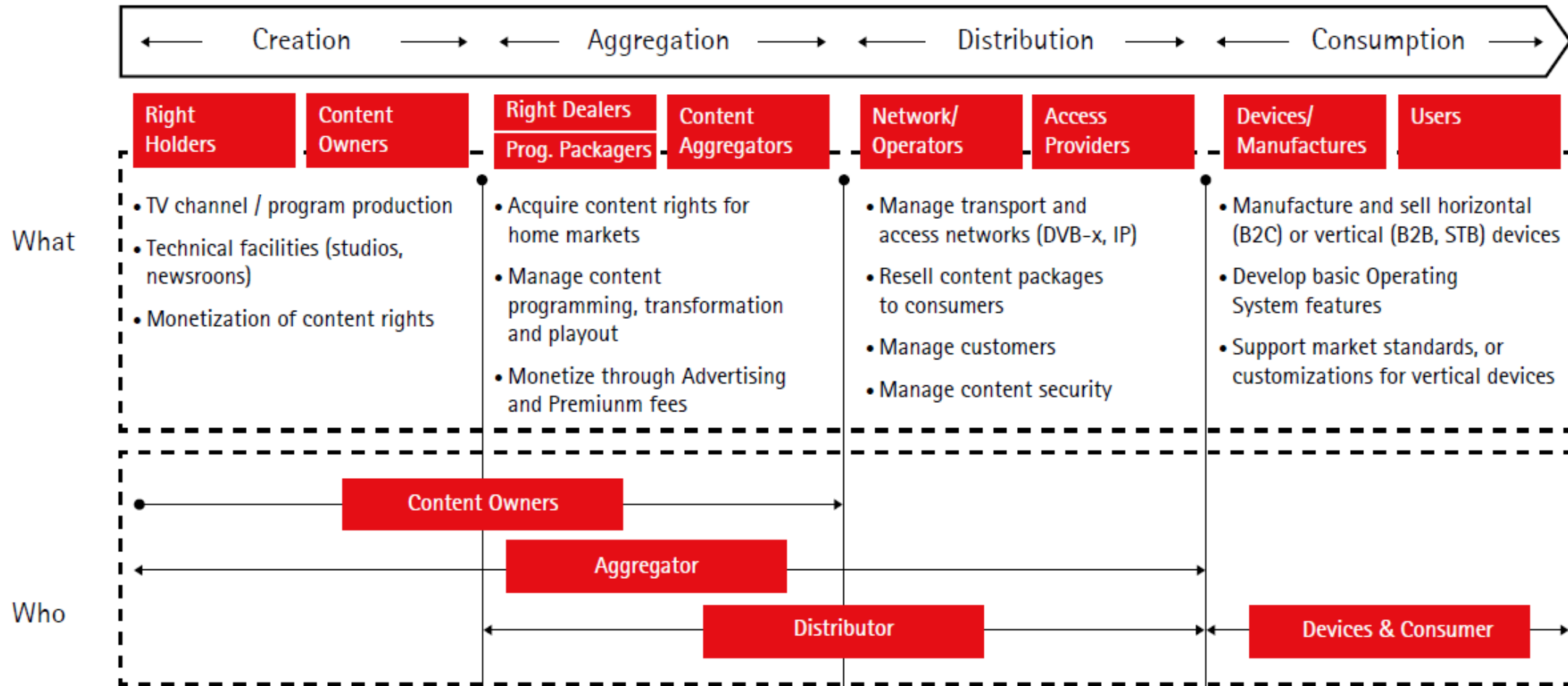
TV screen
Desktop screen
Laptop screen
Smartphone screen
Tablet screen



Source: Ericsson ConsumerLab, TV and Media, 2015
Base: At least weekly viewers of video/TV with broadband at home, aged 16–59, in 20 markets

Source: <http://www.ericsson.com/news/1949448> published 03-09-2015

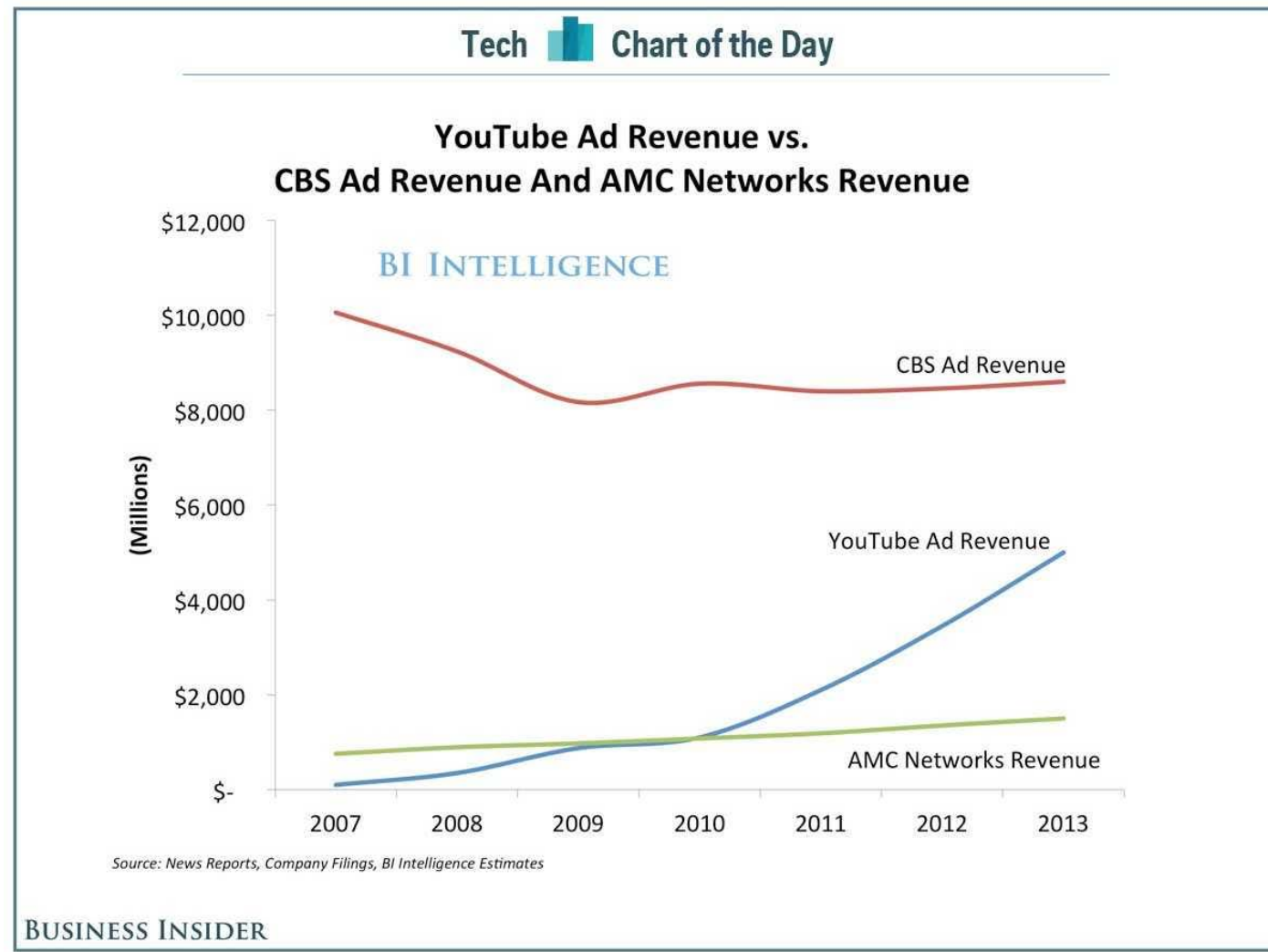
Today each business is part of a complex ecosystem involving multiple players. The game is being played in a completely different league. Newer entrants are willing to change the status quo.



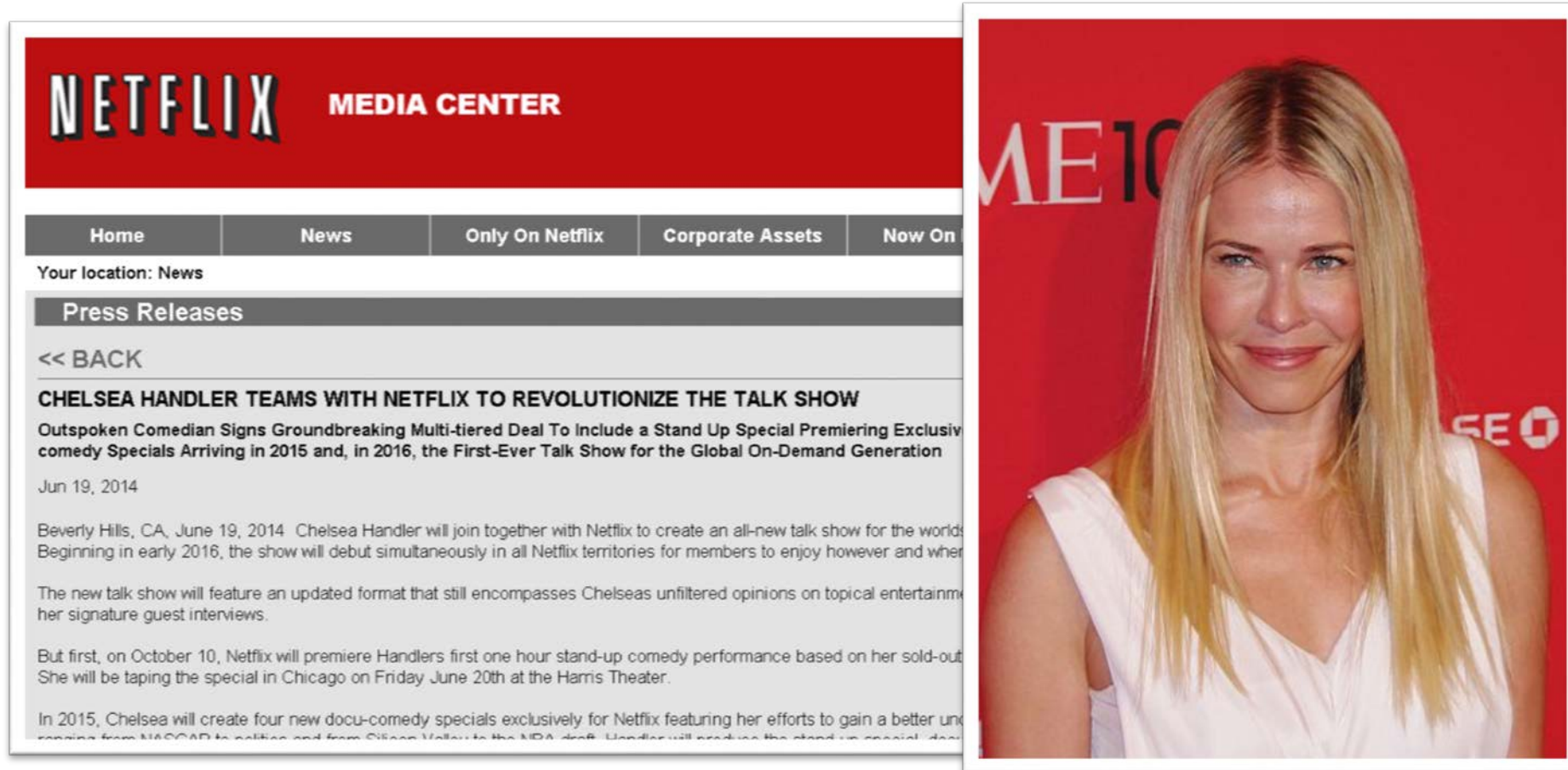
YouTube's Revenue Is Catching Up With TV Networks

Speaking at Business Insider's IGNITION Conference last week, IAC chairman Barry Diller predicted a major shakeup in the cable and satellite TV model within the next five to 10 years. And based on the data out there filed for us by BI Intelligence, it looks like digital streaming is already beginning to catch up to traditional TV networks, at least in terms of revenue.

As you can see in this chart, YouTube's annual ad revenue has been rapidly catching up to that of CBS, one of the biggest and most lucrative TV networks, and has more than twice as much revenue as AMC, which owns several popular shows including "Breaking Bad" and "The Walking Dead." But CBS hopes to maintain and increase its lead over YouTube by embracing a new model: the company recently announced it'll have a streaming subscription service available next year that'll let you watch shows for a monthly fee, similar to Netflix.



Will new platforms become “old-media” broadcasters? Netflix to revolutionize talk shows (on demand).



Chelsea Joy Handler is an American comedian, actress, author, television host, writer and producer. She hosts a late-night talk show called Chelsea Lately, on the E! network.

https://pr.netflix.com/WebClient/getNewsSummary.do?utm_content=&utm_medium=email&newsId=1356&utm_source=Triggermail&nr_email_referer=1

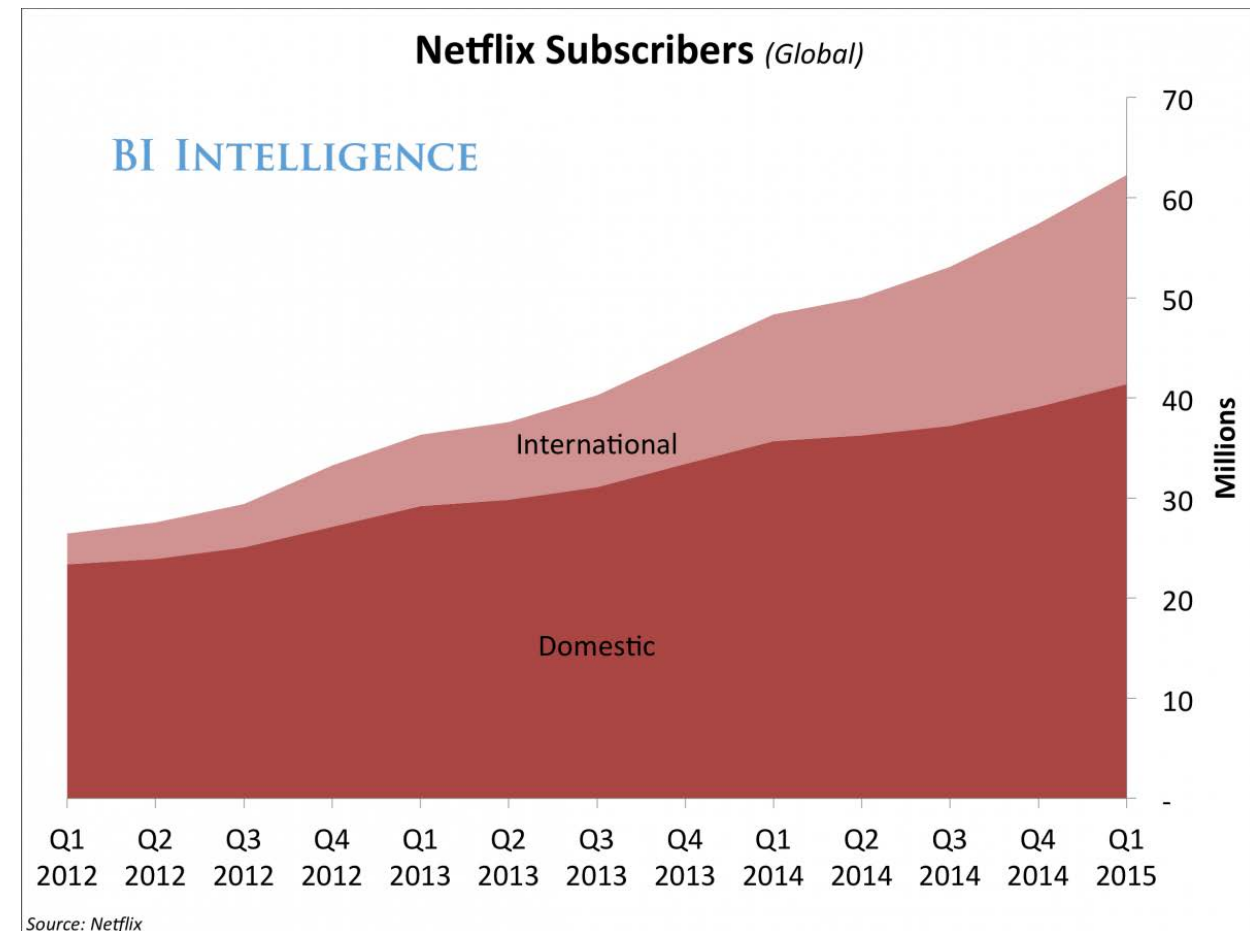
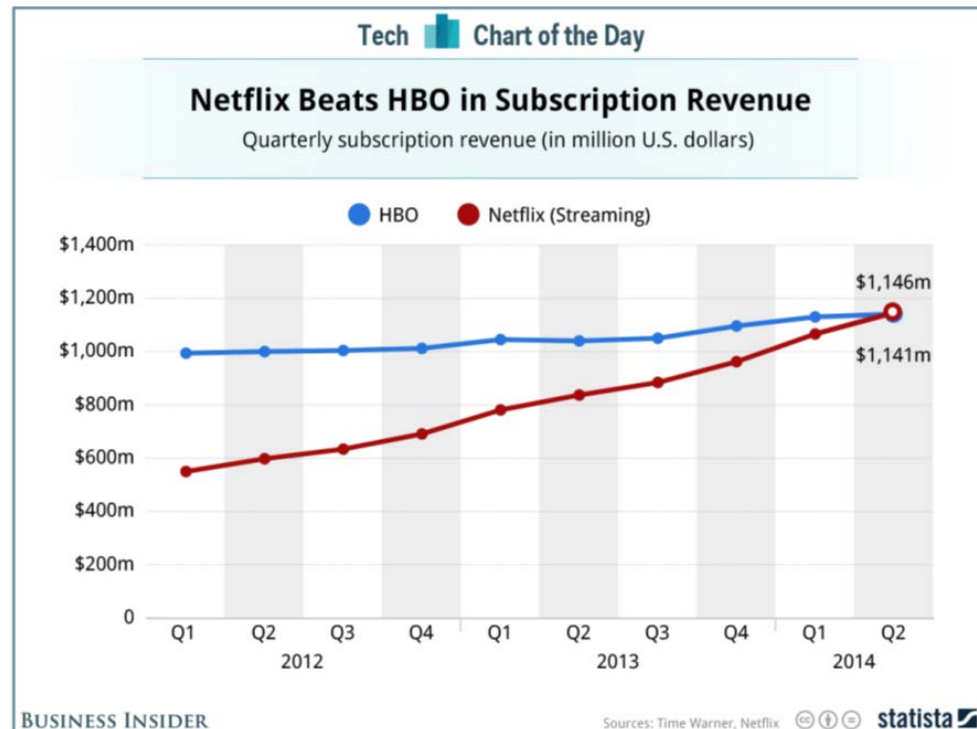


[@NikoMunoz](#)

Why investors are going crazy over Netflix, explained in one chart

Netflix's stock price went up by almost 20% Thursday following its [upbeat earnings report](#) for the first quarter of 2015. One big reason for the surge in Netflix's shares was its better-than-expected user growth. As seen in the chart below, put together by [BI Intelligence](#), Netflix added a record 4.9 million new users last quarter for a total of 62.3 million subscribers.

What's really impressive is its growth in international markets: its 20.8 million international users account for roughly a third of its total users now, a huge jump compared to a year ago. Netflix is now available in more than 50 countries worldwide, including Australia and New Zealand where it launched just last month. Netflix expects to add another 1.9 million new international users in the second quarter, a 70% increase from last year.



Will producers **bypass broadcaster**?

Desintermediation vs new kind of intermediaries

18 JUNE 2014 - 12:01PM **UPDATED** | POSTED BY [JOHN MCCARTHY](#) | 0 COMMENTS

YouTube will be the dominant media platform in five years according to Dreamworks CEO

[f Share](#) 59 [t Tweet](#) 157 [g+1](#) 21 [in Share](#) 71 [Pin it](#) 1 [p Share](#) 249 [✉](#)

YouTube will be the dominant platform in which we consume media in half a decade, dwarfing current television giants, according to Jeffrey Katzenberg CEO of DreamWorks Animation.

Speaking at Cannes Lions, Katzenberg described YouTube as a fantastic platform for studios to discover new talent and said that companies should be looking to invest in it as soon as



Katzenberg's Dreamworks produced Shrek, Madagascar and Kung Fu Panda

Related News

[DreamWorks Animation announces Michael Francis as its first ever chief global brand officer](#)

[YouTube hits billion unique monthly users milestone](#)

[YouTube launches live streaming trial](#)



[@NikoMunoz](#)

#1 BESTSELLER

An A-Mazing Way to Deal with Change
in Your Work and in Your Life

Who Moved My Cheese?

Spencer Johnson, M.D.

Foreword by Kenneth Blanchard, Ph.D.

Co-Authors of **The One Minute Manager**

The World's Most Popular Management Method



[@NikoMunoz](https://twitter.com/NikoMunoz)



ADDRESSABLE ADS ARE CURRENTLY AVAILABLE IN UP TO 42 MILLION HOUSEHOLDS THROUGH LIVE TV AND VIDEO-ON-DEMAND. THE POOL IS EXPECTED TO REACH 50 MILLION HOUSEHOLDS BY THE END OF THIS YEAR.

SOURCE: ADVERTISING AGE, "THE CMO'S GUIDE TO ADDRESSABLE TV ADVERTISING," FEBRUARY 19, 2014

Consumers demand **relevant**, **real-time** and **personalized** interactions with the companies they engage with, and are willing to abandon the brands that fall short of their expectations.

A detail **target audiences definition.**

- ✓ Meeting those expectations, however, requires knowing **who your customers are**, **whenever** and **wherever** they choose to engage with you



“With Atlas Relaunch, Facebook Advances New Cross-Device **ID Based On Logged In Users**”

Facebook has done something big with the relaunch of its Atlas ad server, acquired from Microsoft 16 months ago, but that something has little to do with serving ads. Rather it's about **replacing the beleaguered cookie** with a new, more reliable ad-tracking mechanism for the mobile age. This ID, which strips out all but the most basic information about a Facebook user, is the first salvo in what many expect to be a series of moves by large Internet companies such as **Google, Yahoo, Amazon and Twitter to use the login as the foundation of ad personalization and measurement.**

<http://adexchanger.com/platforms/with-atlas-relaunch-facebook-advances-new-cross-device-id-based-on-logged-in-users/> Sunday, September 28th, 2014 – 11:34 pm.



[@NikoMunoz](#)

What those 2 have in common?



Housewives as TV target

The member of the household who is solely or mainly responsible for the household duties. A housewife may be male or female. There is only one housewife per household.

(Source: BARB Glossary <http://www.barb.co.uk/resources/reference-documents/glossary>)



[@NikoMunoz](https://twitter.com/NikoMunoz)

All **working woman** are not created equal.



The Indie Woman

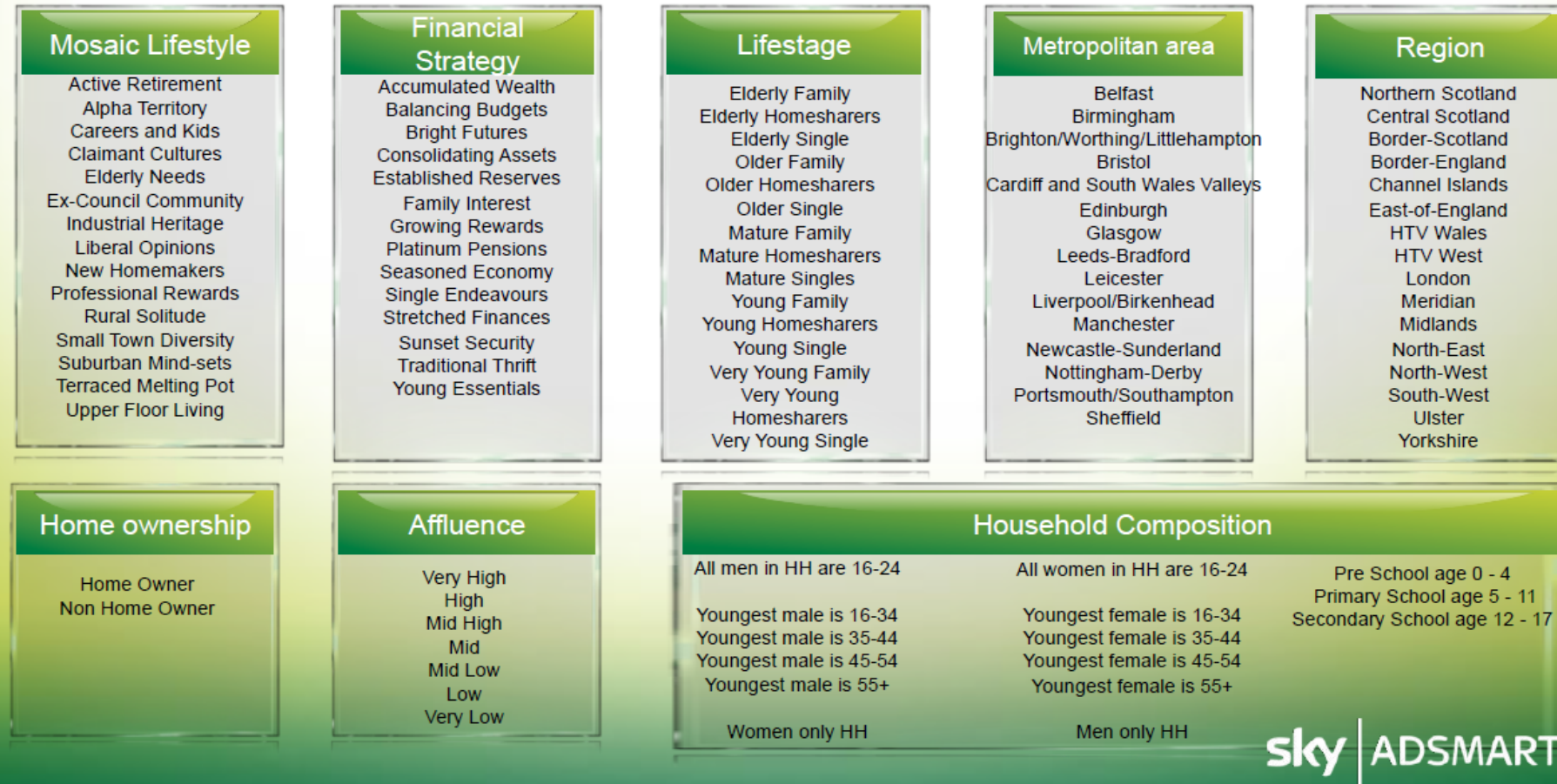


The Mom Achiever



The Alpha Goddess

Sky AdSmart Launch Partner attributes

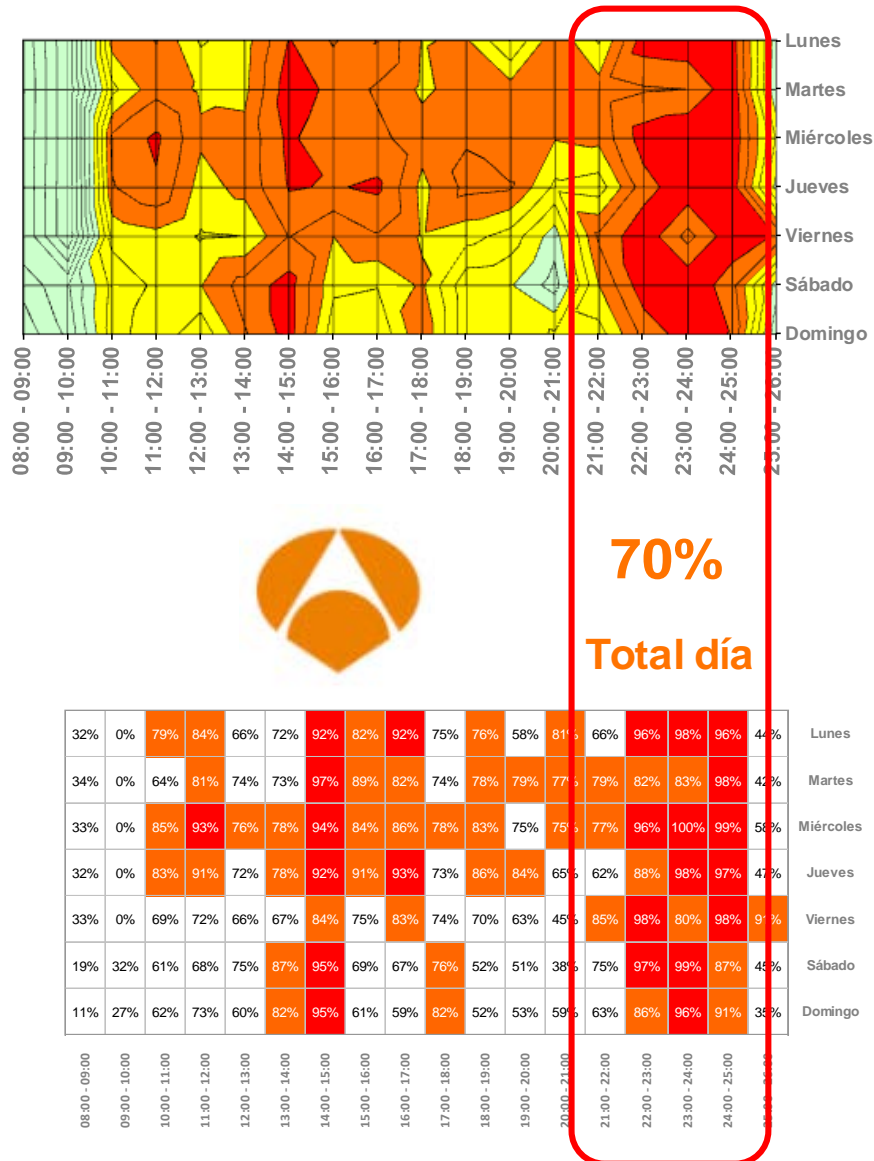


Source: Sky Adsmart presentation at FutureTV Ad Forum (Dec 2013)

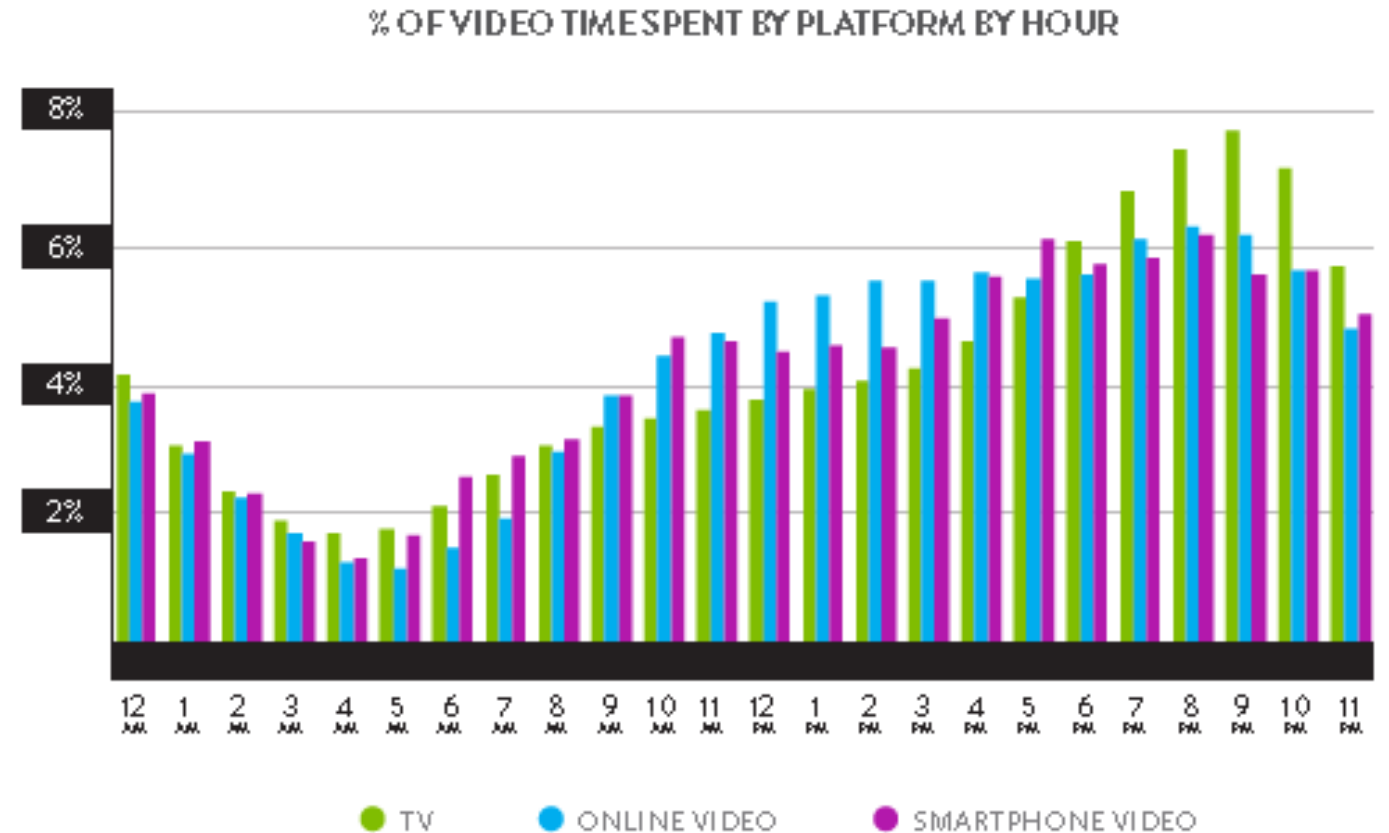


@NikoMunoz

Ad saturation



Prime time is no longer on telly only



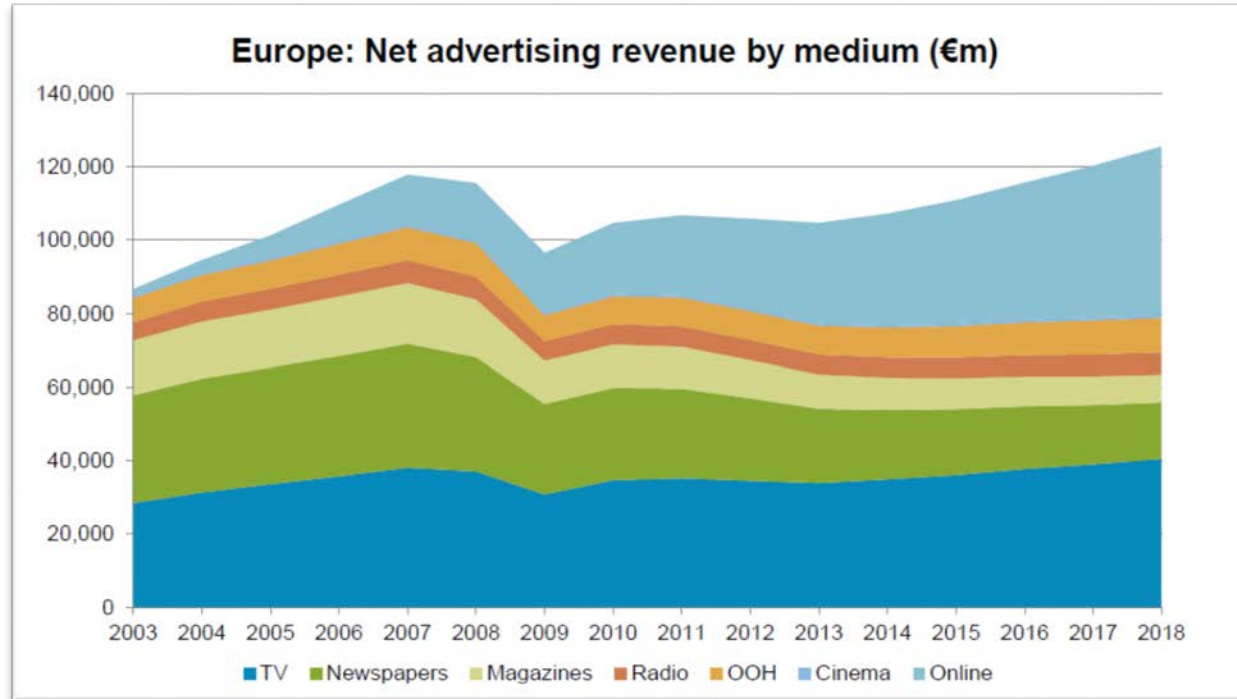
Source: Nielsen March 2014 <http://www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2014%20Reports/nielsen-cross-platform-report-march-2014.pdf>

* El cálculo de la ocupación publicitaria se ha realizado siguiendo los criterios marcados por la ley audiovisual (12 minutos/ hora de publicidad convencional). Excluida Publicidad No Computable y otras formas publicidad salvo Patrocinios I (>10" & <10" en 1ª ó Ult. PB3. El rango 12-13 min./hora reflejado en algunas franjas horarias puede deberse no tanto a un incumplimiento de la ley por parte de una cadena como a un margen de error asumible relacionado con la atribuciones de campañas por parte de Kantar Media. Para La situación actual solo se ha excluido la Advertencia de medicamentos.



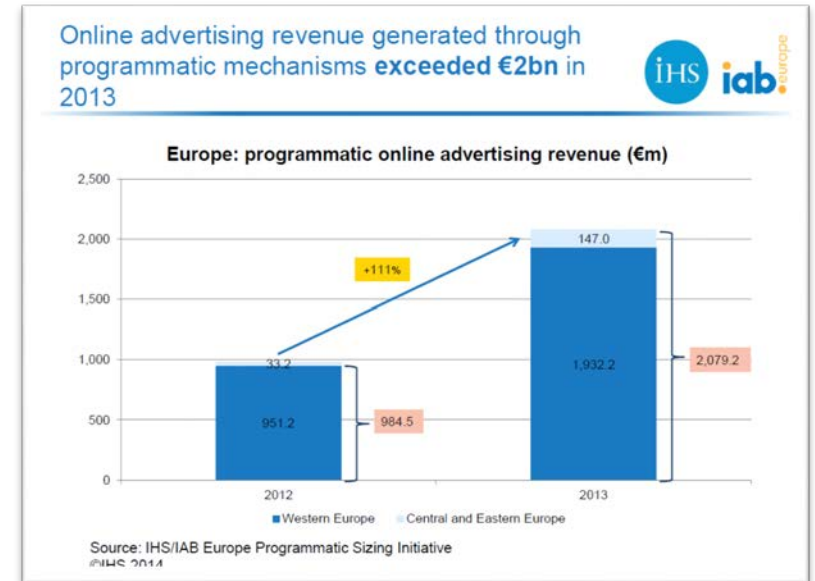
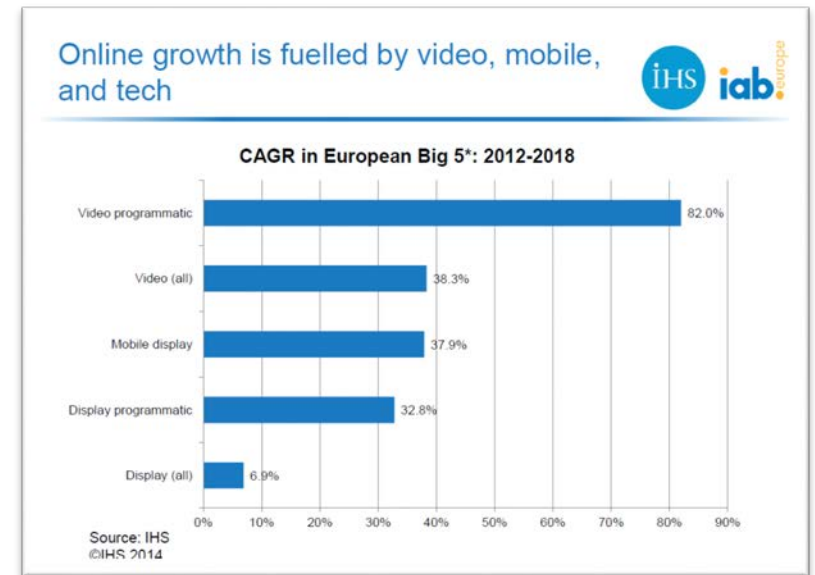
@NikoMunoz

Programmatic in Europe by IAB



IAB estimates that by 2018, online media (including video) will surpass TV, they also see that **Programmatic Video** will capitalize growth .

In 2013 programmatic represented 2,2 B EUR and has growth 111%,





http://creativity-showcase.com/videos/video_lg_mercedes.mp4



[@NikoMunoz](https://twitter.com/NikoMunoz)



 **smartclip**



http://creativity-showcase.com/videos/video_lg_mercedes.mp4



[@NikoMunoz](#)

TV – MOBILE SYNCH

Synchronization: to simultaneously broadcast an ad in several devices thanks to a **fingerprint technology** associated to **Programmatic Buying platform**.

This technology encodes a TV spot to enable its recognition in real time by other devices such as mobile, tablet or desktop. When a TV spot is recognized, the campaign in other screens is activated, buying in real time advertising space segmented by target, interests.. etc



TV – MOBILE SYNCH

Our trial Campaign...

- Synchronization of our **own spots and competitors spot**
 - A) in Social Media environment (Twitter) and all devices (PC, Tablet, Mobiles)
 - B) in mobile sites and applications (video)

During ½ hour after fingerprinted spot was shown on TV



Social Media



Campaign Dates

✗ - 62,5%

Budget

✗ - 23%

Clicks

✓ + 191,2%

CPC

✓ - 75%

We had 3 different creatives online and the campaign was targeted to people interested in the car industry, automotive brands. We achieved in just 6 days of the campaign:

- ✓ + 2 million impressions
- ✓ + 45.000 clicks
- ✓ 51.390 actions (87% clicks, 11% Video views, 1% others like add to favorites, replays, retweets...)
- ✓ A **2,215% CTR** (outstanding data, the average is around 0,80%-1% CTR)
- ✓ 5.739 video views

Mobile

Mobile We showed the same spot as in TV through a RTB campaign with video format

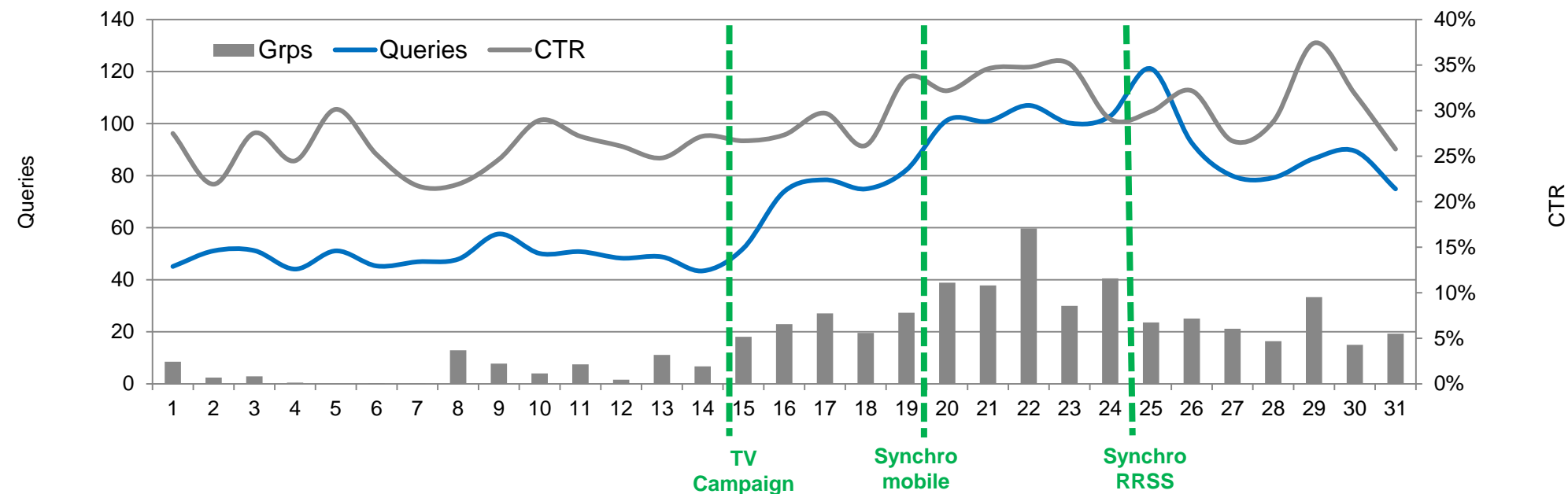


Campaign Dates	✗	- 25%
Budget	✗	- 31,1%
Impressions	✗	- 31,9%
CPM	✓	0%

We achieved in 12 days of the campaign:

- ✓ 500,000 impressions with planned CPM
- ✓ 8.330 clicks
- ✓ 1,67% CTR average

Comparative results.



DATES	CTR when there are no Rio spots	CTR when there are Rio spots	Pp Dif
1 – 19 Only TV	25,6%	27,5%	1,9
20 – 25 TV+ Synchro Mobile	30,6%	32,8%	2,3
26 – 31 TV+Synchro Mobile + Synchro Social Media	27,1%	31,9%	4,8

By the year 2020, an entire generation will have grown up in a primarily digital world. And their familiarity with technology, reliance on mobile communications, and desire to remain in contact with large networks of family members, friends, business contacts, and others will transform how we work and how we consume (Booz & Co. Connected Gen)



Connected-Natives and **next generation** won't do the same as we do,
we need to find new ways to engage them.



@NikoMunoz

Closing guru quote.



“It always seems **impossible** until it is **done**”

Nelson Mandela, Noble Prize (1918-2013)



@NikoMunoz

To continue the conversation

Niko Muñoz

Mail: Niko.Munoz@Me.com

Mobile: + 34 69 565 94 02

Skype: Niko.Munoz.

Twitter: @NikoMunoz

