UPA UTENTI PUBBLICITÀ ASSOCIATI

POLITECNICO MILANO 1863 SCHOOL OF MANAGEMENT

be BRANDING E-VOLUTION 22

Evoluzione dei media e ruolo degli editori tradizionali

Antonio Pepe, Partner di Sensemakers

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Evoluzione della fruizione dei media
Analisi pre/post pandemia

BRANDING E-VOLUTION 22

Reach media giornaliera (milioni)
Popolazione italiana 18+

TV [AUDITEL]
(dato medio al giorno)

MAG 2019
38,2

MAG 2022
36,1

+ NR Ex-IN

-5%

Mobile/PC [Comscore]
(dato medio al giorno)

MAG 2019
32,2

MAG 2022
34,1

+6%

Tempo speso (ore) al giorno su popolazione
Popolazione italiana 18+

TV [AUDITEL]
(dato medio al giorno)

MAG 2019
4:26

MAG 2022
4:02

+ NR Ex-IN

-9%

Mobile/PC [Comscore]
(dato medio al giorno)

MAG 2019
1:40

MAG 2022
1:48

+8%

Fonte: Comscore MMX Multi-Platform per dato digital, Auditel per dato TV (popolazione senza ospiti, include componente Non Riconosciuto Ex-In), Maggio 2022 vs Maggio 2019, Italia

Evoluzione della fruizione dei media
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BRANDING E-VOLUTION 22

Reach media giornaliera (milioni)
Popolazione italiana 18+

TV [AUDITEL]
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MAG 2019
38,2

MAG 2022
36,1
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Mobile/PC [Comscore]
(dato medio al giorno)

MAG 2019
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MAG 2022
34,1

+6%

Tempo speso (ore) al giorno su popolazione
Popolazione italiana 18+

TV [AUDITEL]
(dato medio al giorno)

MAG 2019
4:26

MAG 2022
4:02
+ NR Ex-IN

MAG 2022
4:18
+ NR Ex-OUT
+ NR Play

-3%

Mobile/PC [Comscore]
(dato medio al giorno)

MAG 2019
1:40

MAG 2022
1:48

+8%

UPA UTENTI PUBBLICITÀ ASSOCIATI · POLITECNICO MILANO 1863 SCHOOL OF MANAGEMENT

Fonte: Comscore MMX Multi-Platform per dato digital, Auditel per dato TV (popolazione senza ospiti, include componente Non Riconosciuto Ex-In, Ex-Out e Play), Maggio 2022 vs Maggio 2019, Italia

SENSEMAKERS MINDS & DATA

Fruizione della CTV

Reach media giornaliera (milioni)
Popolazione italiana 18+

TV [AUDITEL]
(dato medio al giorno)

MAG 2022
36,1

di cui da Smart TV Connessa

MAG 2022
12,8

+71%
vs 2019

Tempo speso (ore) al giorno su popolazione
Popolazione italiana 18+

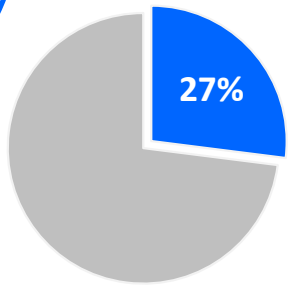
TV [AUDITEL]
(dato medio al giorno)

MAG 2022
4:02

di cui da Smart TV Connessa

MAG 2022
1:04

+68%
vs 2019

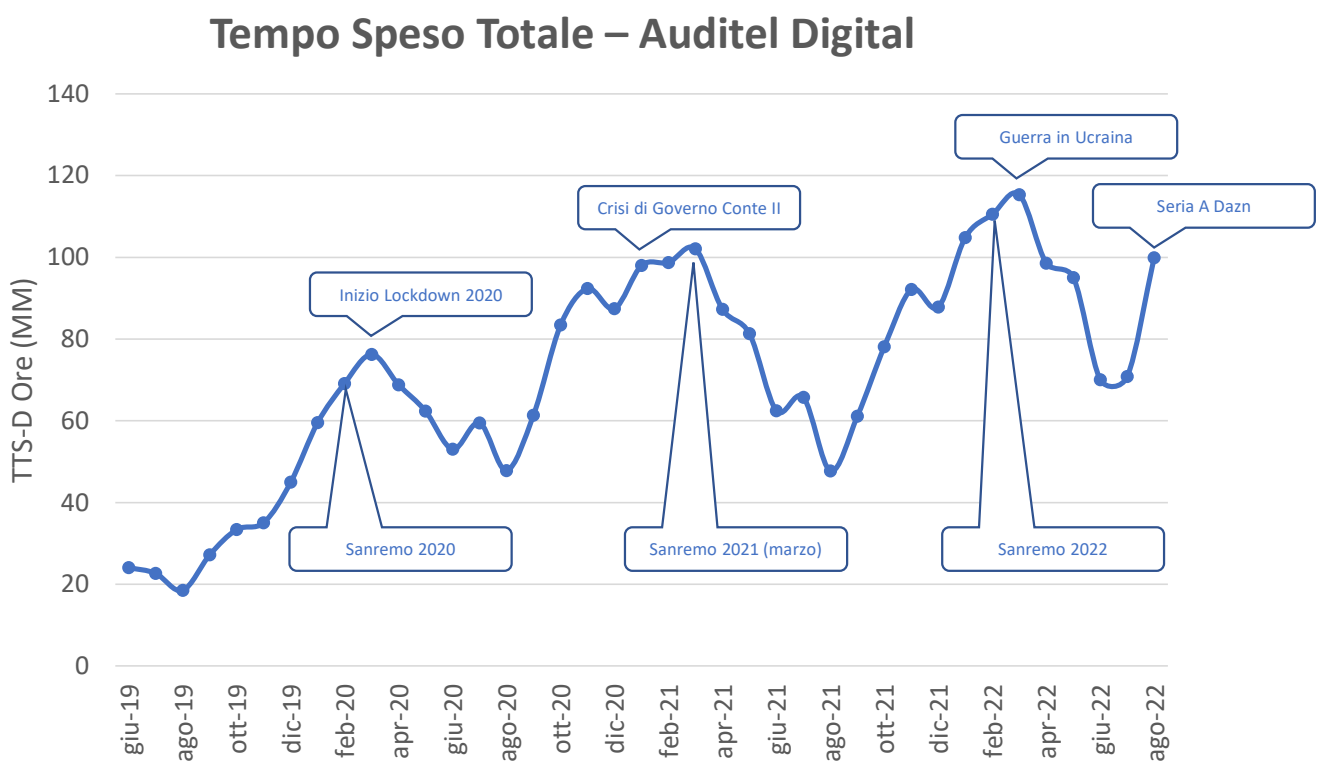


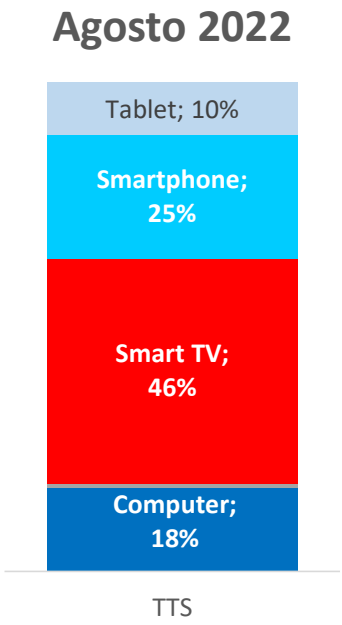
Fonte: elaborazione su dati Auditel (popolazione senza ospiti, include componente Non Riconosciuto Ex-In), Maggio 2022 vs Maggio 2019, Italia

Fruizione dei BVOD

Giu 2022 vs Giu 2019:

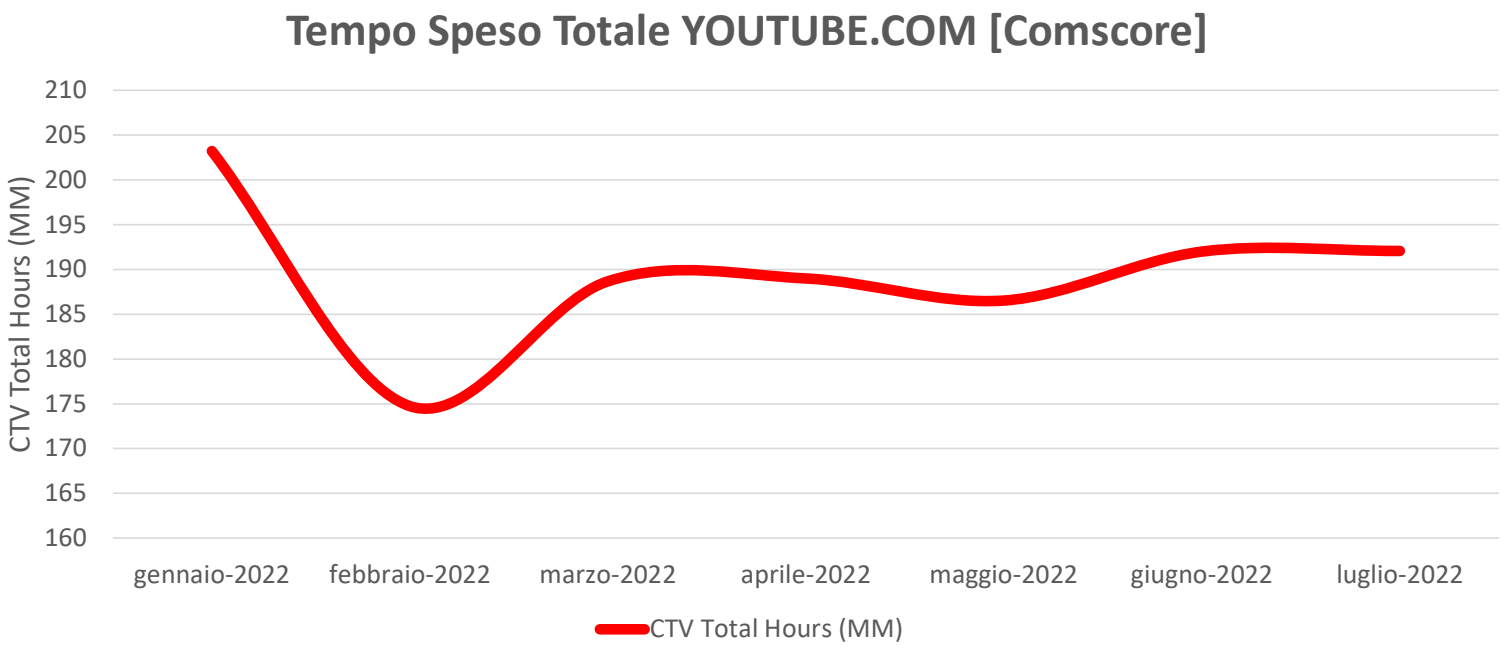
+ 192%





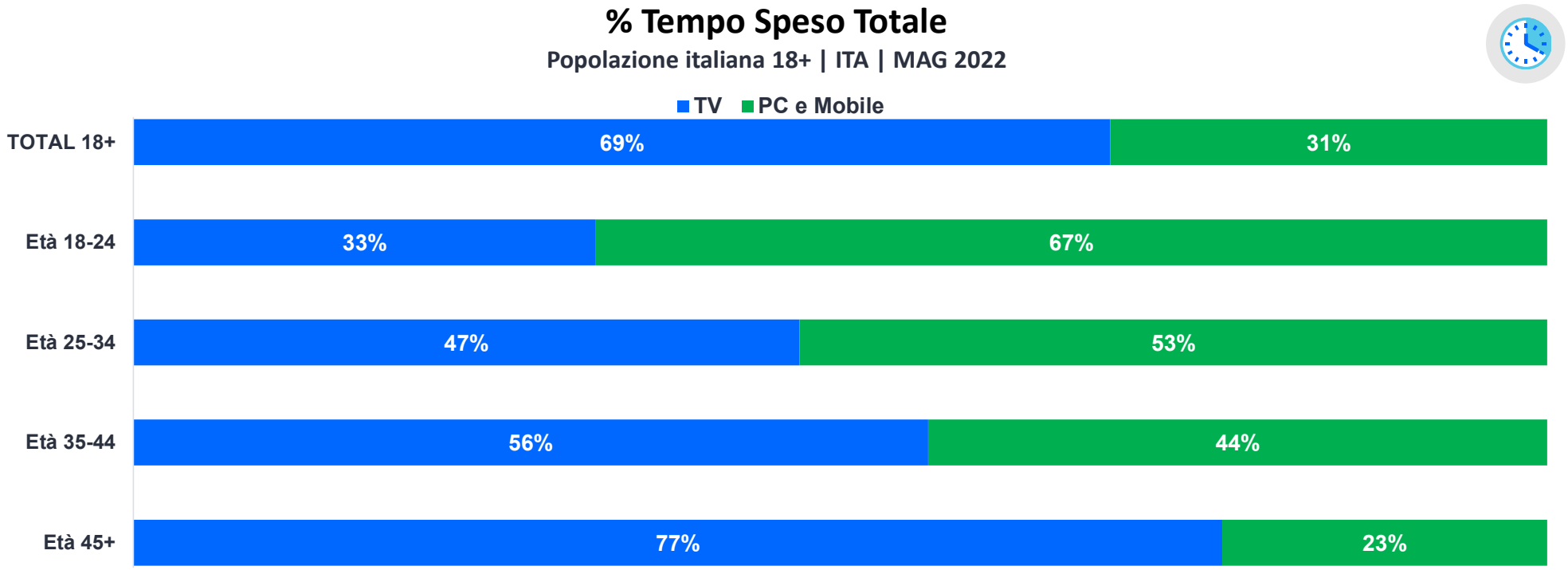
Fonte: elaborazione su dati Auditel Digital, Giugno 2019 – Agosto 2022

Fruizione di Youtube su CTV



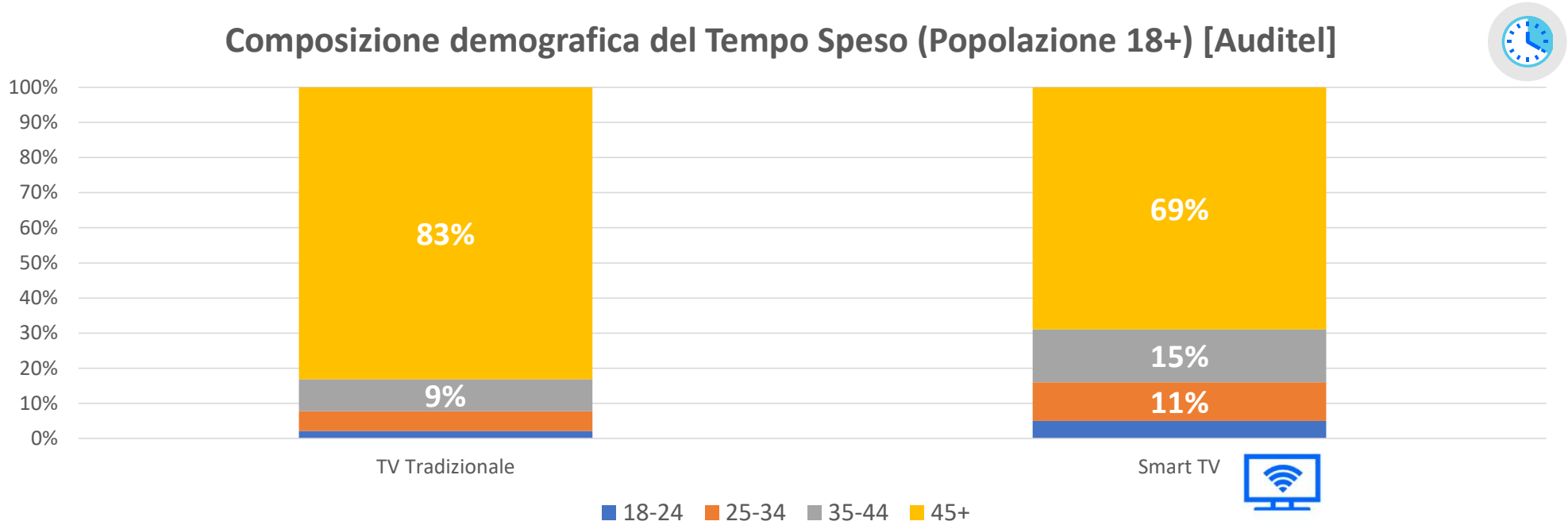
Fonte: Comscore Video Metrix CTV Report Gen 2022 - Luglio 2022, Italia

TV vs Mobile/PC - Composizione demografica



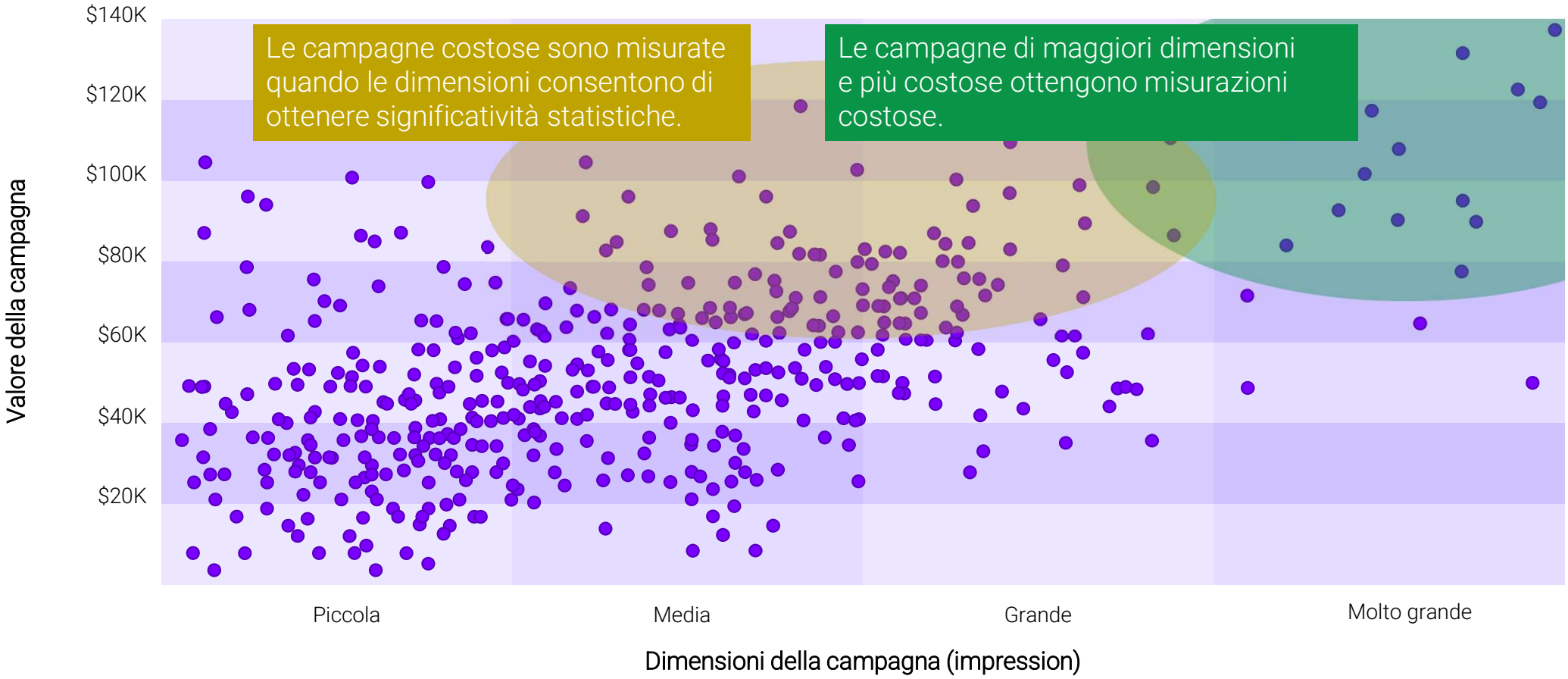
Fonte: Comscore MMX Multi-Platform per dato digital, Auditel per dato TV (popolazione senza ospiti , include componente Non Riconosciuto Ex-In), Maggio 2022, Italia

TV vs Smart TV - Composizione demografica

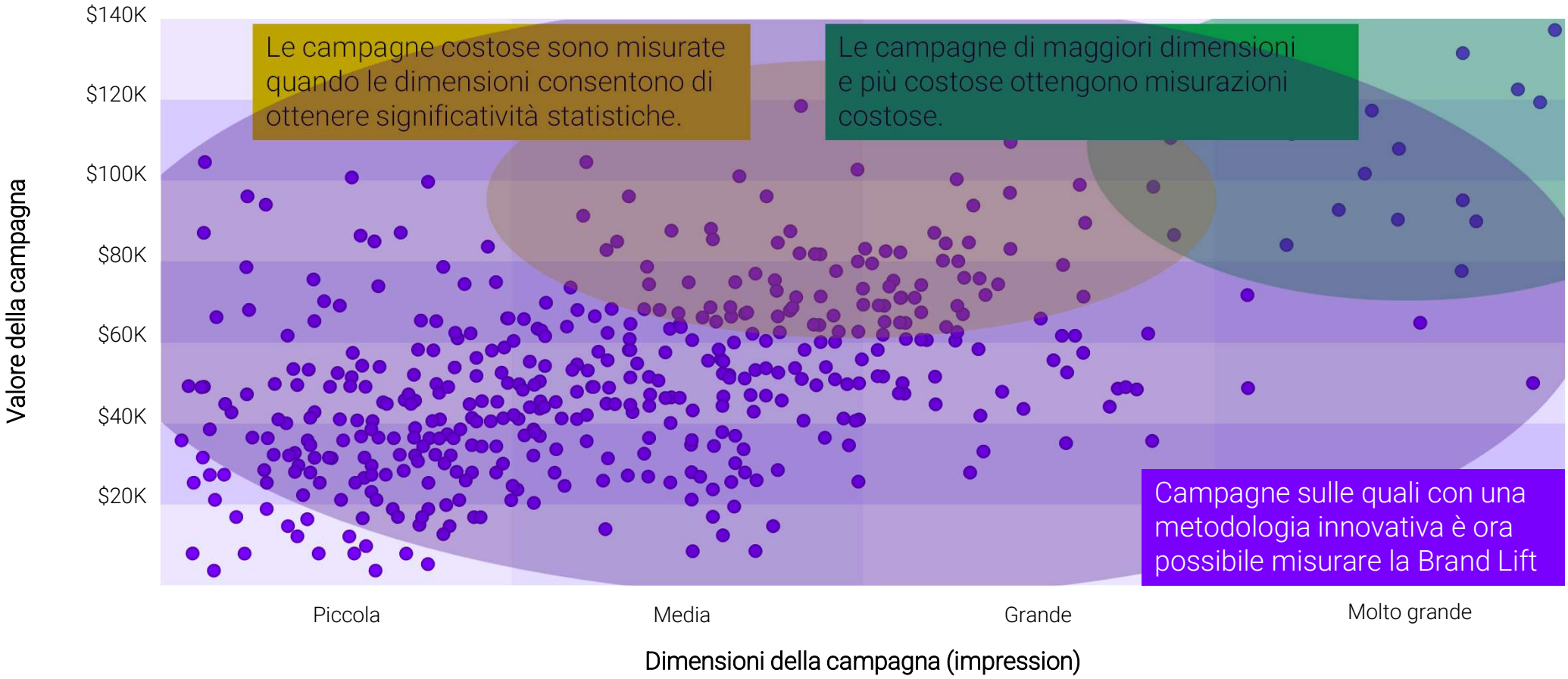


Fonte: Auditel per dato TV (popolazione senza ospiti, include componente Non Riconosciuto Ex-In, Ex-Out e Play), Maggio 2022, Italia

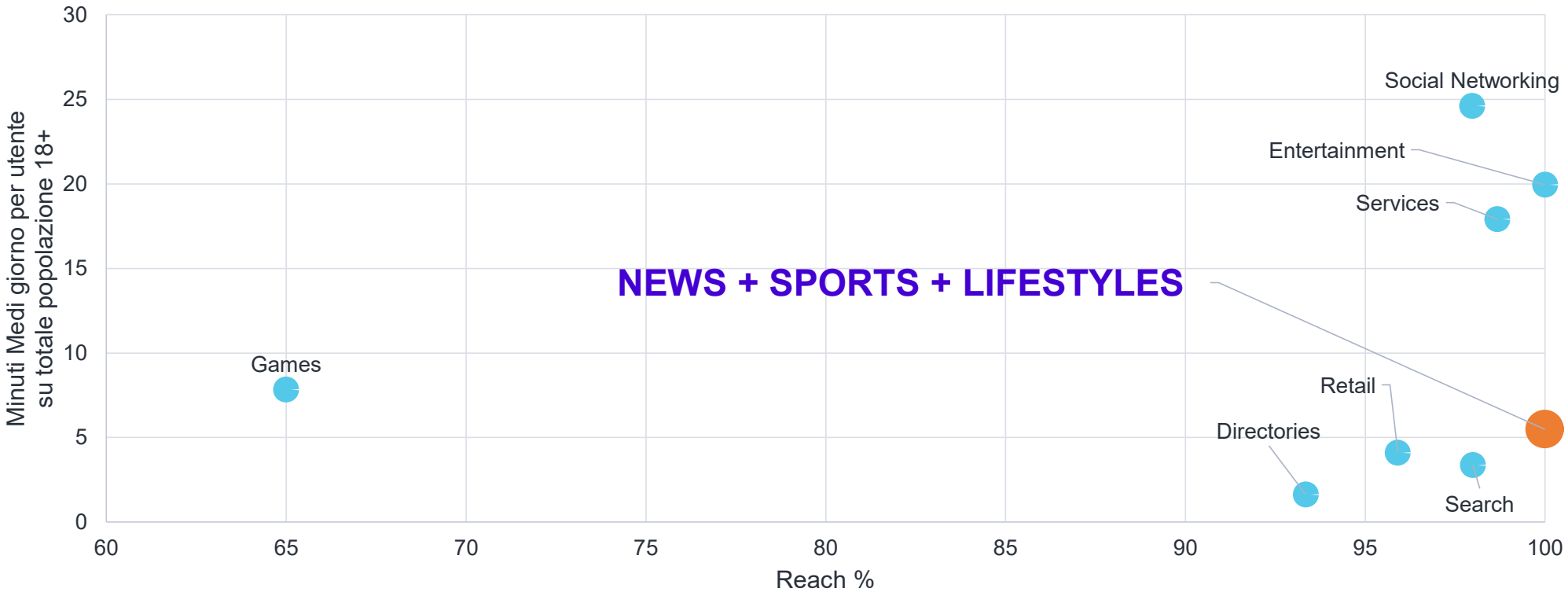
La Brand Lift non misurata sulla maggior parte delle campagne



L'obiettivo è allargare la misurazione della Brand Lift alle campagne medio-piccole con budget ridotti



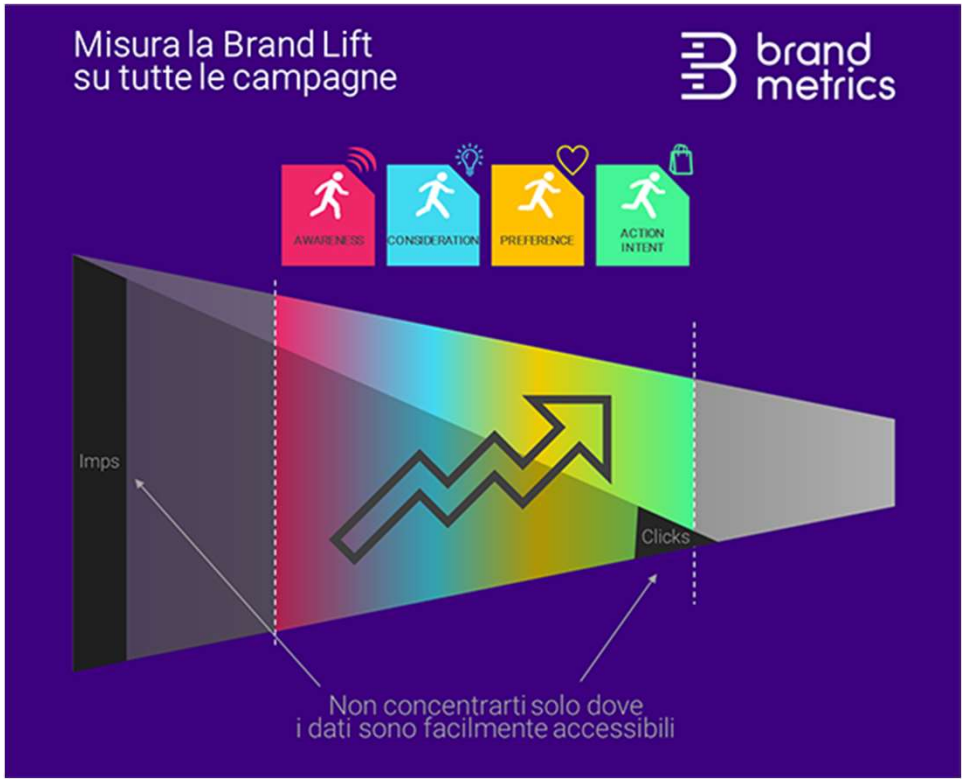
Fruizione su Mobile e PC per tipologia di Property



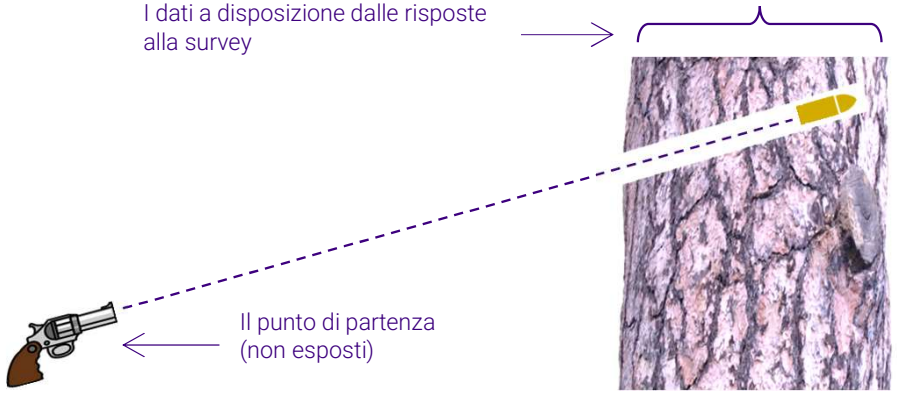
Fonte: Comscore MMX Multi-Platform, Total Internet 18+, Maggio 2022, Italia

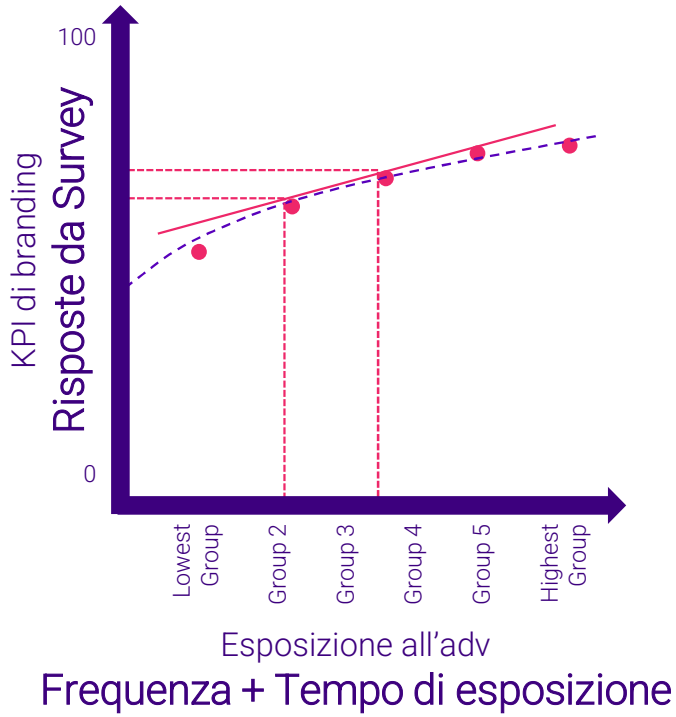
La Brand Lift da misurazione sporadica a perno dell'efficacia dei media online

- Focus sulla qualità.
- Metodologia standard.
- Scalabilità.
- Cookieless-proof.
- Adozione a livello internazionale.
- Misurazione di campagne Display&Video e Branded Content.



L'approccio metodologico di Brand Metrics





Brand Metrics in numeri

BRANDING E-VOLUTION 22

Presenza in
16
country

Implementazione su oltre
500
website worldwide

Oltre
6.000
brand nel database

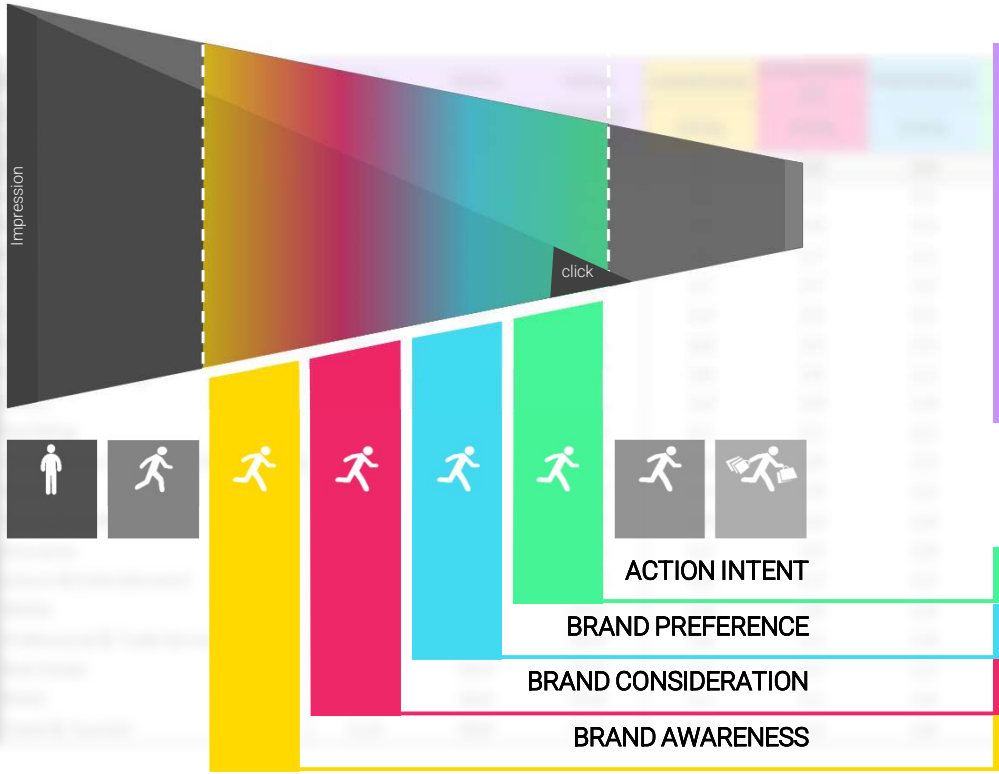
Benchmark su
122
Industry Categories

Oltre
16.000
campagne misurate

Oltre
3 milioni
di survey completate

La presenza globale di Brand Metrics al fianco di editori premium

Il dato di Brand Lift medio sull'intero database Brand Metrics
Contributo per ogni KPI di Branding



BRAND LIFT TOTALE

+10,3 pp

ACTION INTENT	16 %
BRAND PREFERENCE	23 %
BRAND CONSIDERATION	29 %
BRAND AWARENESS	31 %
TOTALE	100 %

Fonte: Brand Metrics, elaborazione su totale di 16.118 campagne misurate nel periodo 2018-2022

Brand Lift per tipologia di campagna Display&Video / Branded Content

DISPLAY & VIDEO / BRANDED CONTENT	TOTAL	DISPLAY & VIDEO	BRANDED CONTENT	TOTAL				DISPLAY & VIDEO				BRANDED CONTENT			
BRAND LIFT KPI	ALL	ALL	ALL	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT
ALL INDUSTRIES	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Automotive	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Banking & Finance	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beauty	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Career & Education	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Electrical, Tech, Telecoms	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Energy & Sustainability & Utilities	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fashion & Clothing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
FMCG	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gambling	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Government / Non-profit Organisations	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Health	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Home & Garden	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insurance	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Leisure & Entertainment	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Media	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Professional & Trade Services	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Real Estate	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Retail	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Travel & Tourism	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

+10,3 pp | Tutte le campagne

+9,7 pp | Display&Video

+22,7 pp | Branded Content

Fonte: Brand Metrics, elaborazione su totale di 16.118 campagne (95% Display&Video, 5% Branded Content) misurate nel periodo 2018-2022

Le industry con le migliori performance per tipologia di campagna Display&Video / Branded Content

DISPLAY & VIDEO / BRANDED CONTENT	TOTAL	DISPLAY & VIDEO	BRANDED CONTENT	TOTAL				DISPLAY & VIDEO				BRANDED CONTENT			
BRAND LIFT KPI	ALL	ALL	ALL	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT
ALL INDUSTRIES	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Automotive	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Banking & Finance	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beauty	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Career & Education	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Electrical, Tech, Telecoms	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Energy & Sustainability & Utilities	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Fashion & Clothing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
FMCG	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gambling	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Government / Non-profit Organisations	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Health	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Home & Garden	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insurance	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Leisure & Entertainment	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Media	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Professional & Trade Services	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Real Estate	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Retail	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Travel & Tourism	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

TOP - Display e Video

- **111** (index) **Energy/Utilities** (+10,7 pp)
- **108** (index) **Real Estate** (+10,4 pp)
- **107** (index) **Home&Garden** (+10,4 pp)

TOP - Branded Content

- **137** (index) **Travel&Tourism** (+31,1 pp)
- **106** (index) **Insurance** (+24,1 pp)
- **105** (index) **Gambling** (+23,9 pp)

Fonte: Brand Metrics, elaborazione su totale di 16.118 campagne (95% Display&Video, 5% Branded Content) misurate nel periodo 2018-2022

Contributo dei KPI di Branding per tipologia di campagna Display&Video / Branded Content

DISPLAY & VIDEO / BRANDED CONTENT	TOTAL	DISPLAY & VIDEO	BRANDED CONTENT	TOTAL				DISPLAY & VIDEO				BRANDED CONTENT			
BRAND LIFT KPI	ALL	ALL	ALL	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT
ALL INDUSTRIES															
Automotive															
Banking & Finance															
Beauty															
Career & Education															
Electrical, Tech, Telecoms															
Energy & Sustainability & Utilities															
Fashion & Clothing															
FMCG															
Gambling															
Government / Non-profit Organisations															
Health															
Home & Garden															
Insurance															
Leisure & Entertainment															
Media															
Professional & Trade Services															
Real Estate															
Retail															
Travel & Tourism															

Contributo alla Brand Lift per singolo KPI	Display & Video	Branded Content
Awareness	32%	29%
Consideration	29%	36%
Preference	23%	23%
Action intent	16%	12%

Fonte: Brand Metrics, elaborazione su totale di 16.118 campagne (95% Display&Video, 5% Branded Content) misurate nel periodo 2018-2022

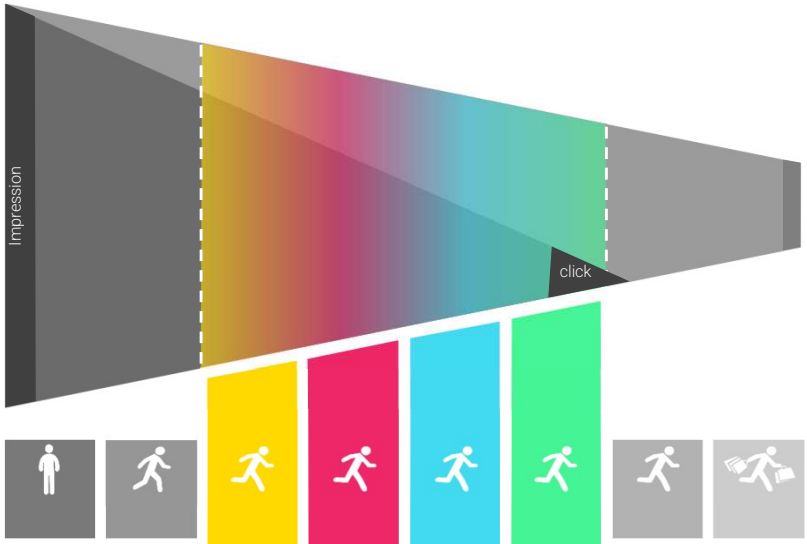
Focus Branded Content -
Contributo dei KPI di Branding per le top industry

DISPLAY & VIDEO / BRANDED CONTENT	TOTAL	DISPLAY & VIDEO	BRANDED CONTENT	TOTAL				DISPLAY & VIDEO				BRANDED CONTENT			
BRAND LIFT KPI	ALL	ALL	ALL	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT	AWARENESS	CONSIDERATION	PREFERENCE	ACTION INTENT
ALL INDUSTRIES	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Automotive	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Banking & Finance	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Retail	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Travel & Tourism	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

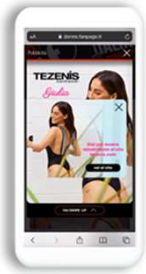
Contributo alla Brand Lift per singolo KPI	BRANDED CONTENT All industries	Travel & Tourism	Insurance	Gambling
Awareness	29%	26% (+8,0pp)	27%	22%
Consideration	36%	35% (+11,0pp)	36%	43%
Preference	23%	25% (+7,9pp)	27%	27%
Action intent	12%	13% (+4,2pp)	9%	8%

Fonte: Brand Metrics, elaborazione su totale di 16.118 campagne (95% Display&Video, 5% Branded Content) misurate nel periodo 2018-2022

KPI di Branding su singole campagne



ciaopeople

	Tezenis Capsule Collection	Intimissimi Fasce
		
ACTION INTENT	56 %	> 1 %
BRAND PREFERENCE	13 %	15 %
BRAND CONSIDERATION	19 %	> 1 %
BRAND AWARENESS	12 %	86 %
TOTALE	100 %	100 %

Fonte: Brand Metrics, maggio-giugno 2021

Brand Lift - Fattori chiave di successo

BRANDING E-VOLUTION 22

- Obiettivo di campagna
- Timing
- Creatività
- Messaggio e Tone of voice
- Industry e set competitivo
- Tipologia di Campagna (display, video, branded content)
- Targeting
- Contesto editoriale
- Formati
- Frequenza di esposizione