

The future of certification from an agency perspective

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IFABC general assembly

Ascona, June 8th, 2016



ZenithOptimedia
The ROI Agency

Agenda

- Pre-Roll ad: A short introduction to ZenithOptimedia
- Our challenge – the digital transformation
- Media business transformation
- The future of certification



So let's look at some
"advertising" first...



A quick introduction to...

Zenith Optimédia

A modern office interior with a large illuminated sign for 'Zenith Optimédia'. The sign is composed of blue LED lights forming the letters. The office has a grid ceiling with recessed lighting, a person standing near a desk, and a grey sofa in the foreground. The scene is viewed through a glass partition with a grid pattern.

We are...

2ND LARGEST GLOBAL
MEDIA GROUP



PUBLICIS GROUPE

ZenithOptimedia
The ROI Agency



Starcom MediaVest™
GROUP



razorfish™ DIGITAS



PUBLICIS

fallon



Leo Burnett

SAATCHI & SAATCHI

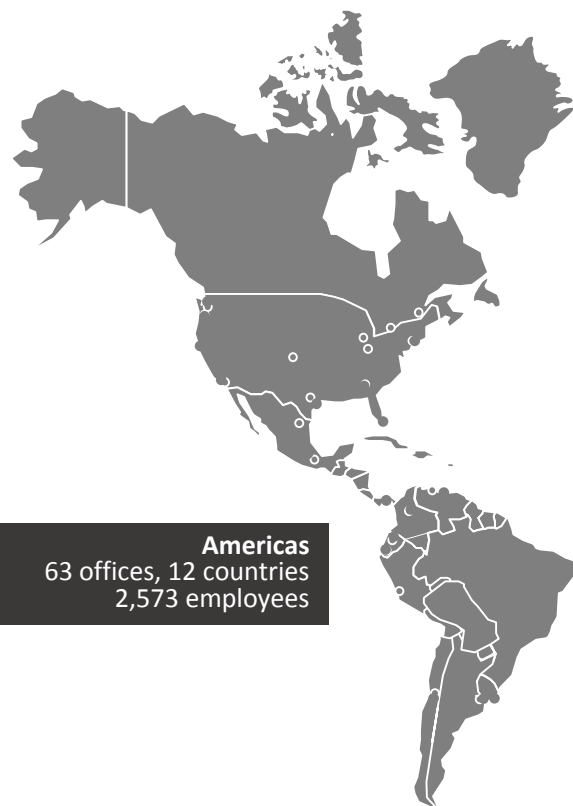
Zenith Network

262
Offices

74
Countries

7,478
Employees

32%
Digital staff



EMEA
136 offices, 47 countries
3,239 employees



Asia Pacific
63 offices, 15 countries
1,666 employees

59 people



work for
in Switzerland

ZenithOptimedia

50 in Zürich

and 9 in Nyon.

ZenithOptimedia
The ROI Agent

The way we work



Operating System

Planning Framework
A FRAMEWORK FOR
COMMUNICATIONS PLANNING

Working Process
HOW WE WORK
TOGETHER IN TEAMS

Talent & Organisation
WHO WE RECRUIT AND
HOW WE ORGANISE THEM

Technology
FACILITATING OUR
KNOWLEDGE AND DATA

Some of our important global & local clients



Nestlé



Mercedes-Benz

2

3



UBS



IWC

Fielmann



SCA
Care of Life



Electrolux

Cartier

smart

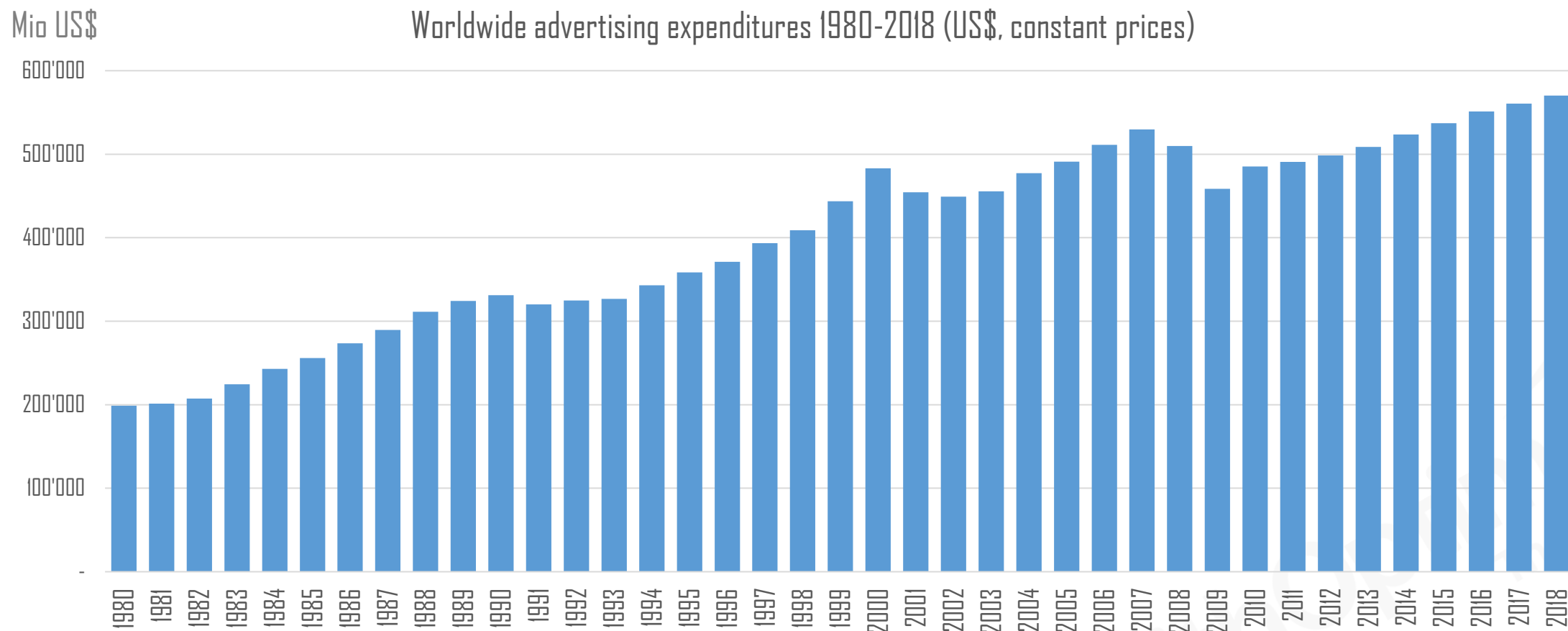


Optimedia
The ROI Agency

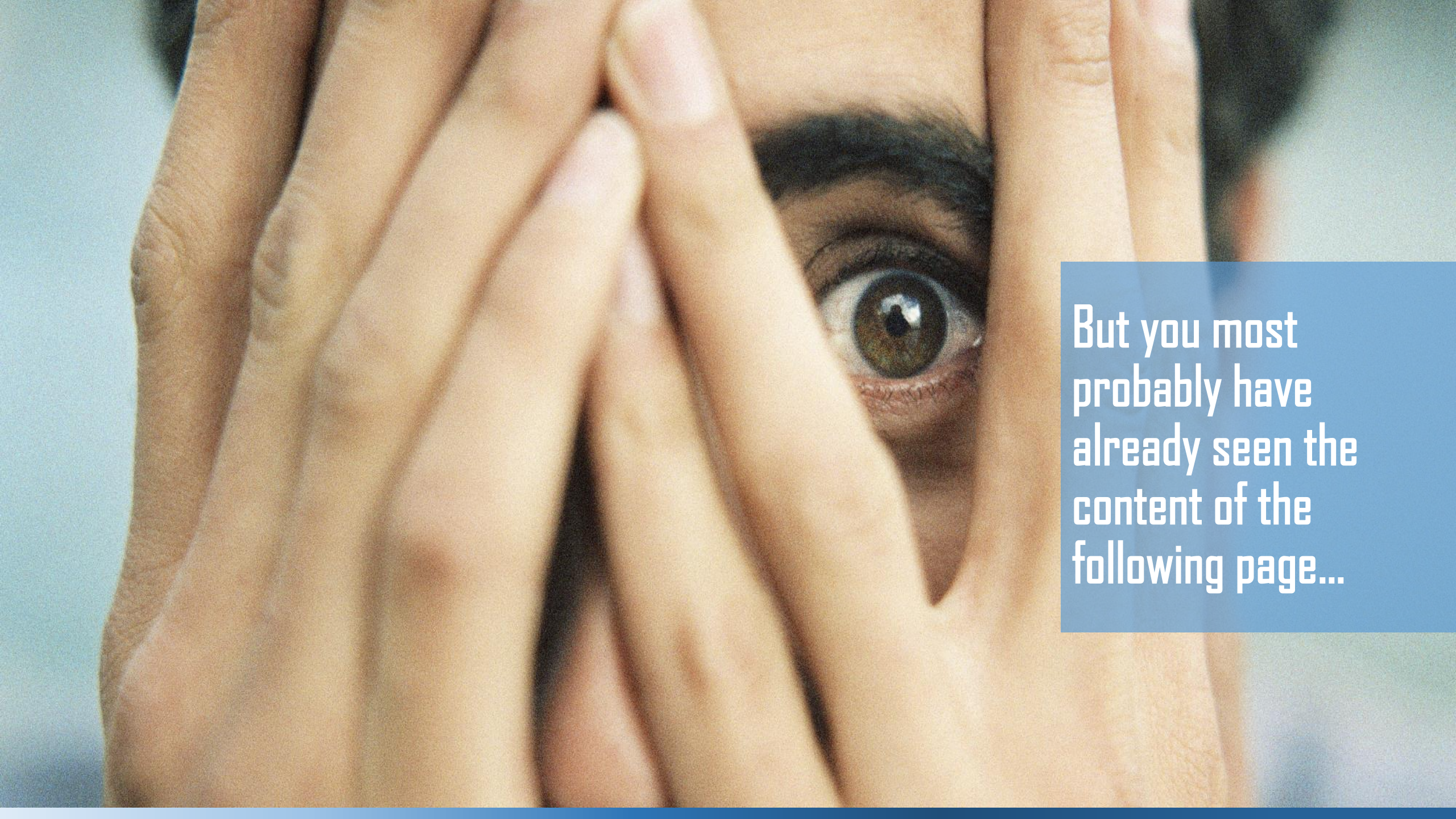
Our challenge - the digital revolution



The good news is... advertising market grows on and on and on



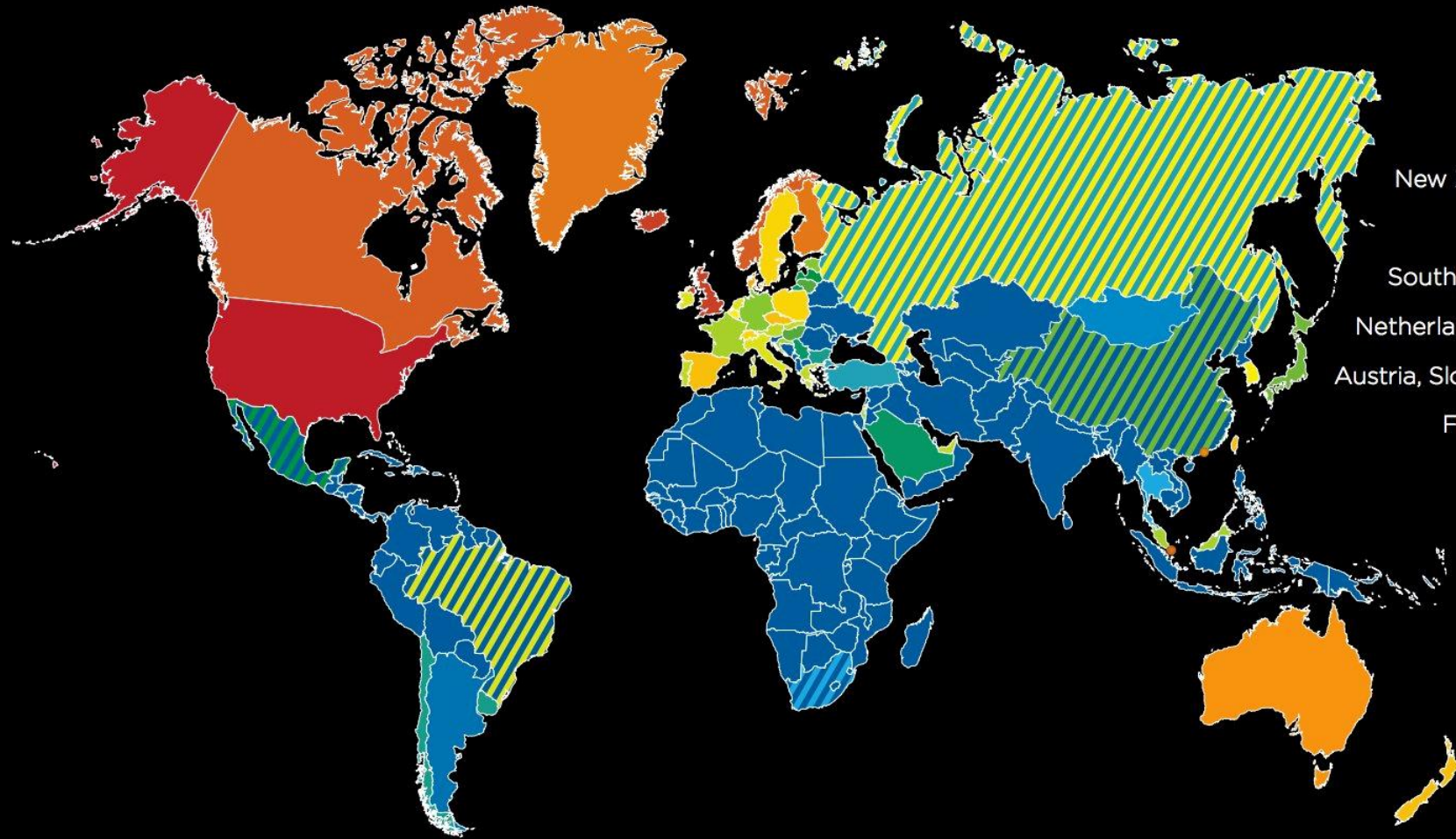
Source: ZenithOptimedia Advertising Expenditure Forecast 2/2016



But you most probably have already seen the content of the following page...

Newspaper extinction timeline

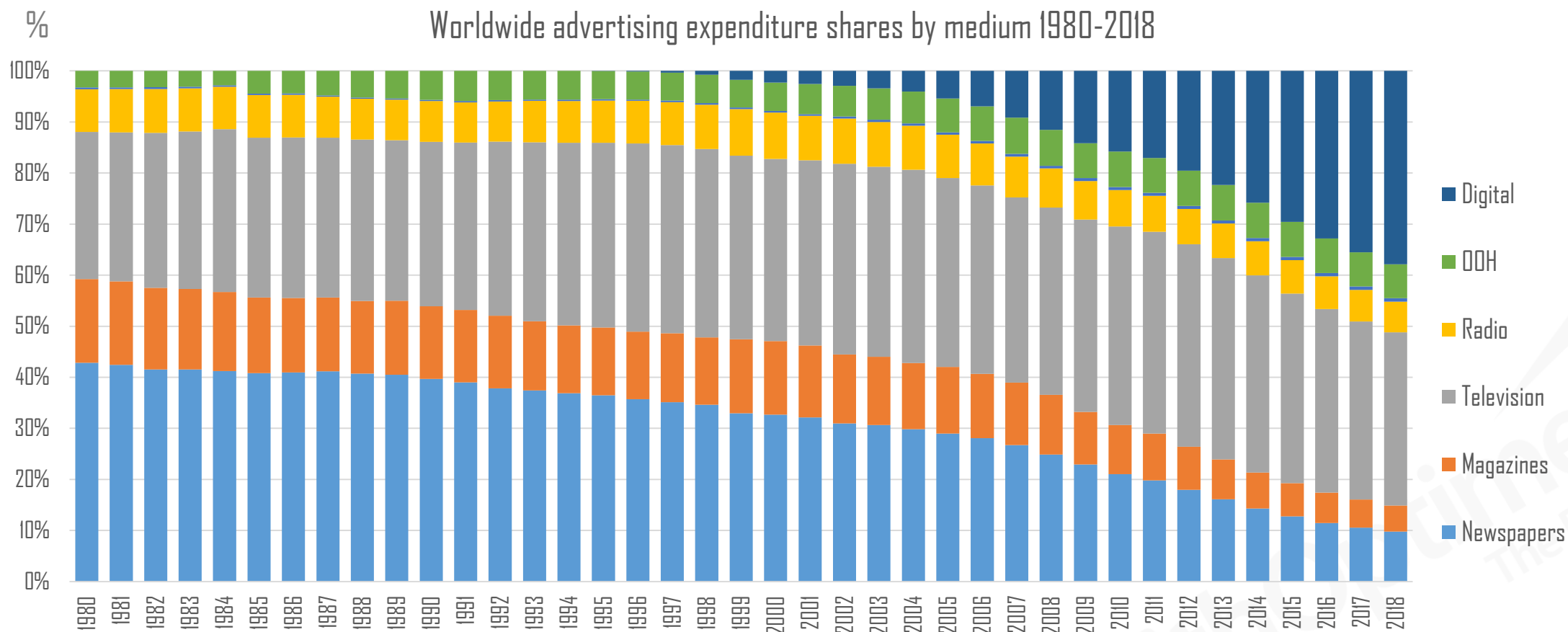
When newspapers in their current form will become insignificant*



- USA **2017**
- UK, Iceland **2019**
- Canada, Norway **2020**
- Finland, Singapore, Greenland **2021**
- Australia, Hong Kong **2022**
- Denmark **2023**
- New Zealand, Spain, Czech, Taiwan **2024**
- Poland, Sweden, Switzerland **2025**
- South Korea, Metro Russia, Belgium **2026**
- Netherlands, Ireland, Metro Brazil, Italy **2027**
- Austria, Slovakia, Greece, Portugal, U.A.E. **2028**
- France, Israel, Malaysia, Croatia **2029**
- Germany, Estonia **2030**
- Japan, Metro China **2031**
- Hungary, Lithuania **2032**
- Latvia, Metro Mexico **2033**
- Serbia, Saudi Arabia **2034**
- Bulgaria, Chile, Uruguay **2035**
- Russia, Turkey **2036**
- Metro South Africa, Thailand **2037**
- Mongolia **2038**
- Argentina **2039**
- Rest of the world **2040+**

— stripes indicate that newspapers will be extinct in metropolitan areas before regional areas

Growth is driven by digital - print media under pressure

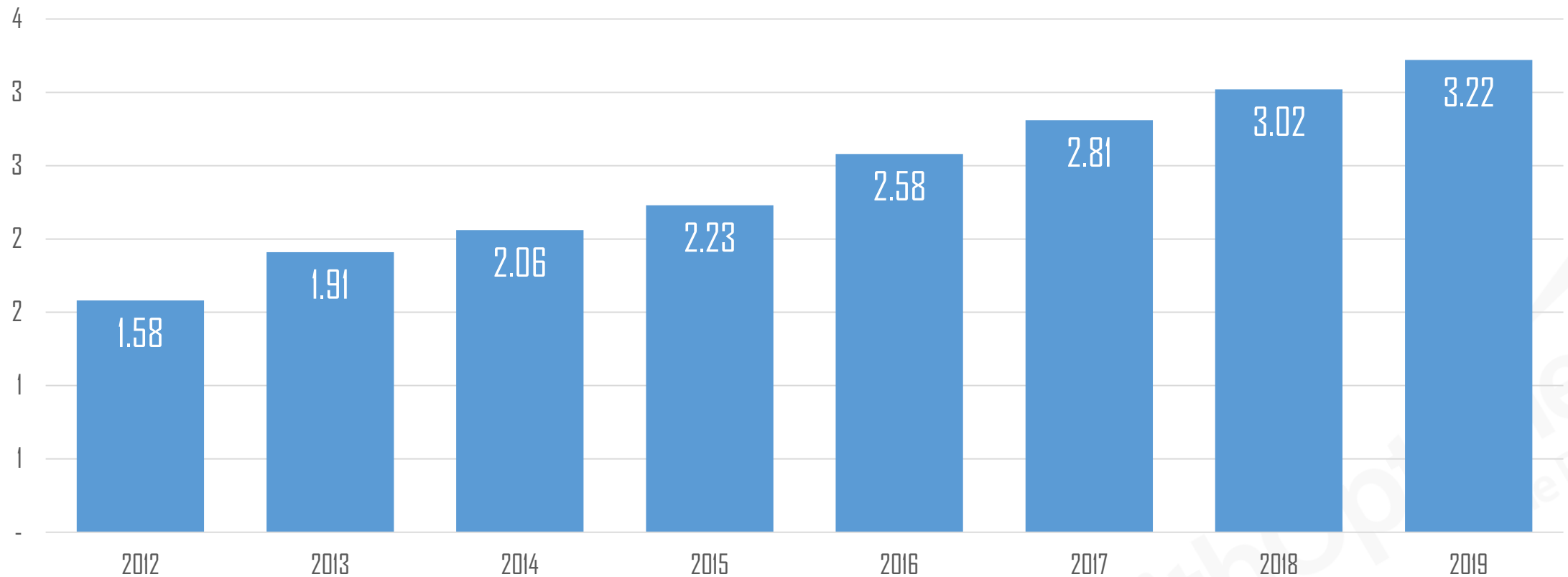


Source: ZenithOptimedia Advertising Expenditure Forecast 2/2016

Number of mobile internet users grows massively

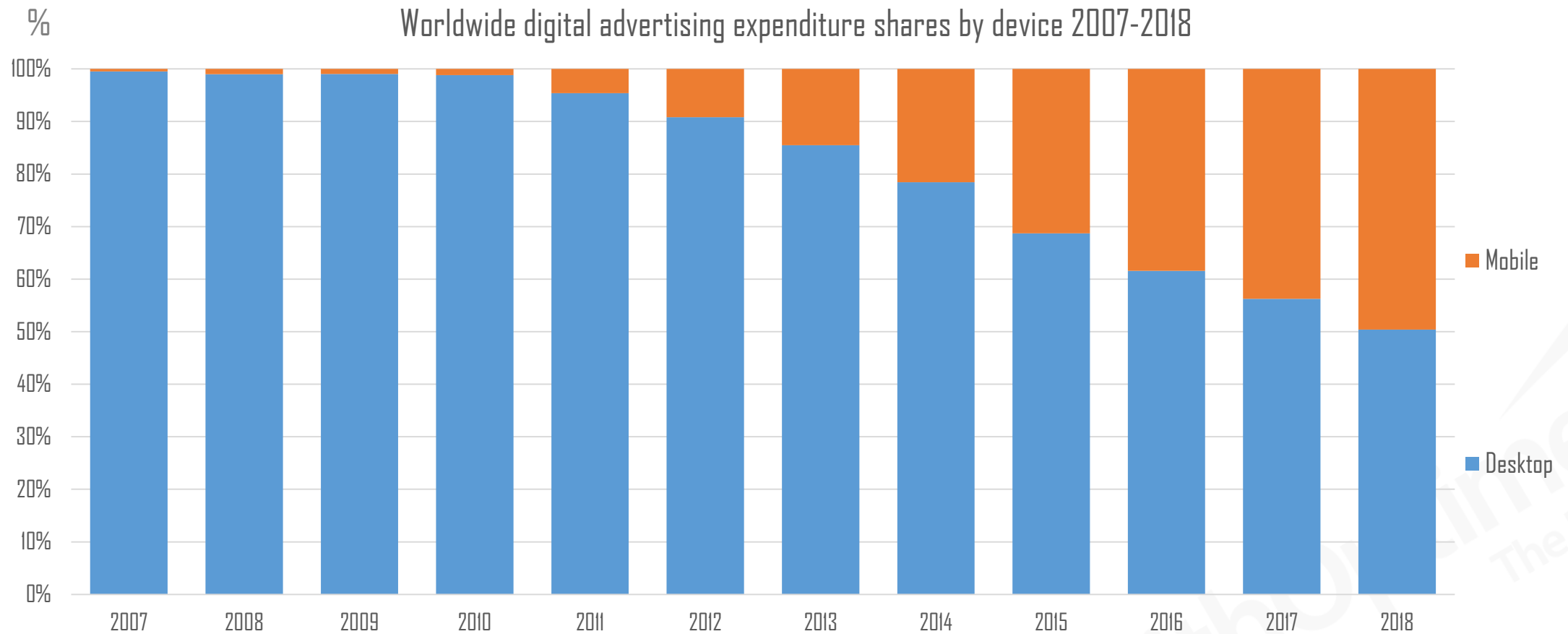
Billion users

Worldwide users of mobile internet 2012-2018



Source: Statista 2016

In two years mobile advertising is on eye level with desktop!



Source: ZenithOptimedia Advertising Expenditure Forecast 2/2016



The future of
advertising
is mobile!

really!

Social media

Social media is the social interaction among people in which they create, share or exchange information and ideas in virtual communities and networks.



so-cial me-di-a
news [treated as sign. or pl.]
web sites and applications used for social networking.



WORLDWIDE

like!
SHARE CHAT



SEARCH



Web-site

a location connected to the Internet that maintains one or more pages on the World Wide Web



Internet

SOCIAL MEDIA

Tweet

In-ter-net
a global computer network providing a variety of information and communication facilities, consisting of interconnected networks using standardized communication protocols



E-mail

friend

- ① a person whom one knows and with whom one has a bond of mutual affection, typically exclusive of sexual or family relations
- ② (friend) a member of the Religious Society of Friends, a Quaker.

The transformation of media agency business



ADD FRIENDS

COMMUNITY

World Wide Web

The world wide web is a system of interlinked hypertext documents that are accessed via the Internet. With a web browser, one can view web pages that may contain text, images, videos, and other multimedia and navigate between them via hyper...



Our top four challenges of the near future

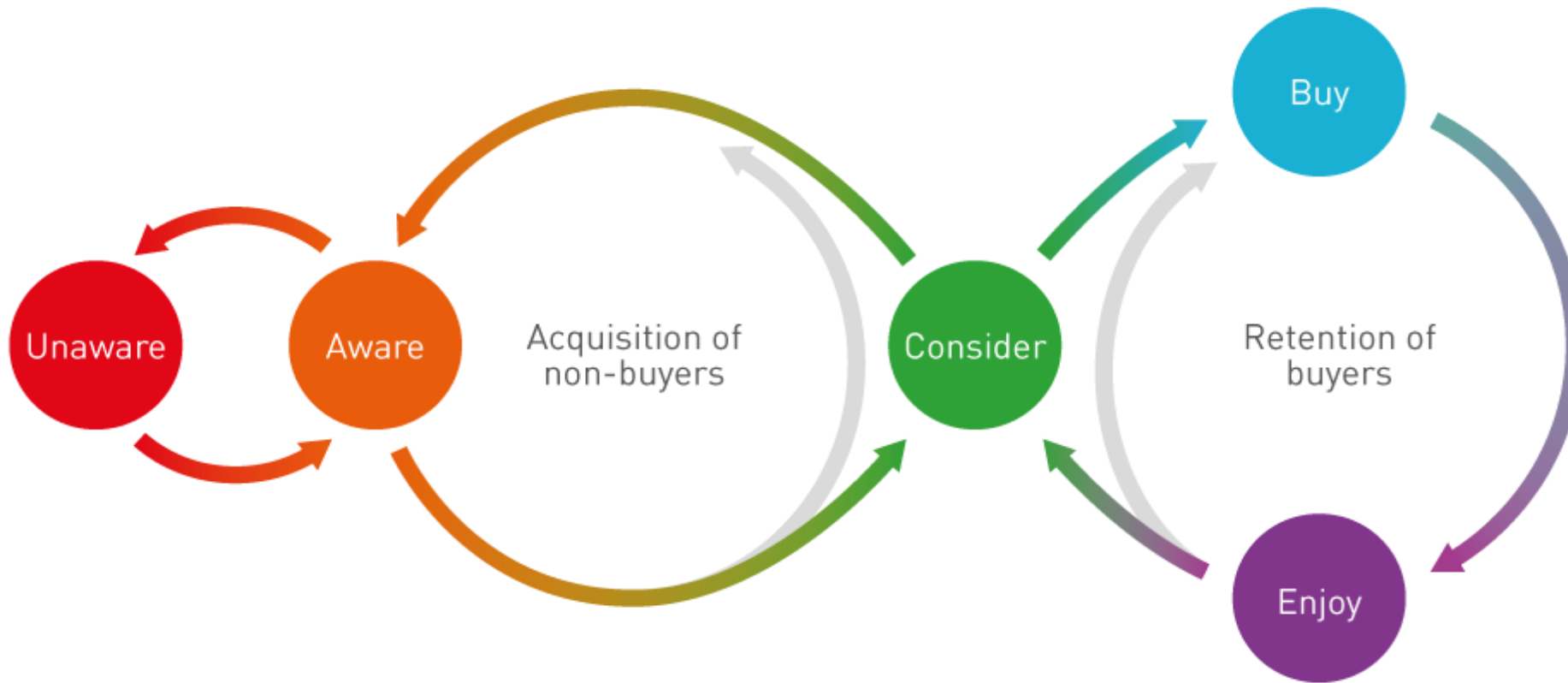


Number 1: From obsessive retargeting to mutual conversation



Behave like
a butler, not
a stalker

Number 2: Say goodbye to the linear marketing funnel



A consumer journey may have a beginning, but it never comes to an end

Number 3: Media is not just about buying paid media any more



Paid media is about amplifying brand stories over POE, not about creating them

Marketers think beyond advertising these days



Natürliche Zutaten - selbst
gepflanzt Gemüse und Kräuter
selber ziehen - in Ihrem Garten
oder auf dem Balkon. Mit vielen
Tipps, Infos und Rezepten.

Nestlé Switzerland's approach to gain the trust of mothers

Mit diesem Schalter
wechseln Sie von
den Eltern- zu den
Kinder-Artikeln.



Don't say you are the solution - be the solution!

Vanish don't advertise the product, they advertise their Tip Exchange platform.

The screenshot shows the Vanish website's 'Tip Exchange' section. At the top, there is a navigation menu with links for 'Products', 'Tip Exchange', 'Vanish in Action', 'Stain Solver', 'News & Articles', 'Buy online', and 'FAQs'. A search bar and social media icons for Facebook and Twitter are also visible. The main content area features the Vanish logo on the left and a 'Buy Vanish' button on the right. The central message reads 'THE TIP EXCHANGE' inside a Venn diagram of two overlapping speech bubbles, with the tagline 'Where there's a stain THERE'S A WAY'. Below this, there are two buttons: 'I'VE GOT A STAIN' with a question mark icon and 'I'VE GOT A TIP' with a checkmark icon. At the bottom, there is a search bar for tips with dropdown menus for 'Select stain' and 'Select material', a search icon, and a button to '...or add a question' with a plus sign icon.

Number 4: Qualified contacts instead of target group reach

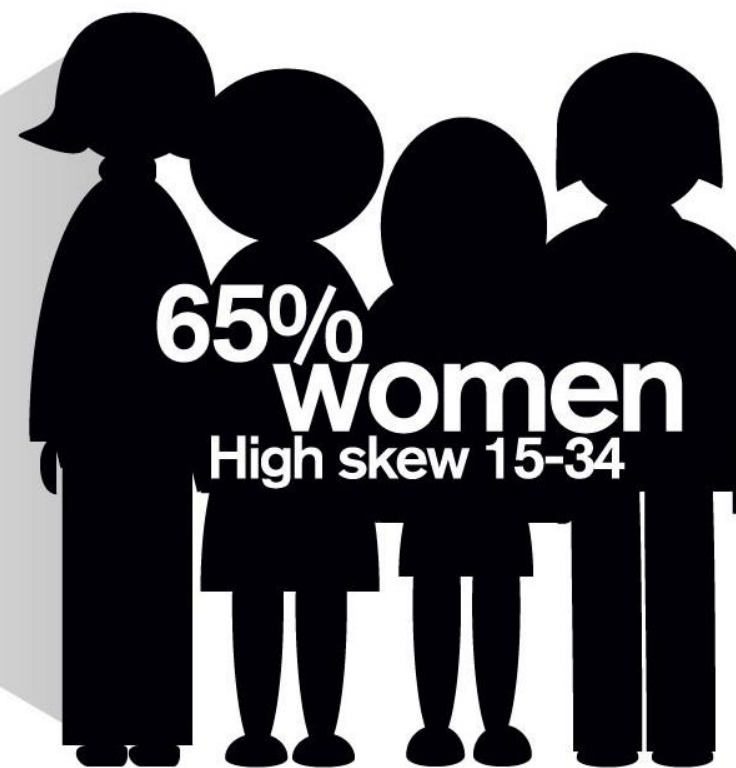


Programmatic
buying is
revolutionizing
media business

SmithOptimMedia
The ROI Agent

1.0 – Reach a target group through context

The screenshot shows the Gala.de website interface. At the top, there is a navigation bar with the Gala.de logo, social media links (Facebook, Twitter, RSS, Newsletter), a search bar, and the date/time (19.07.12 | 11:11). Below the navigation bar is a large banner for PANTENE PROV. The main content area features a news article titled "Jacqui + Guy Überraschung auf dem roten Teppich" (Jacqui + Guy Surprise on the red carpet). The article text reads: "Guy Ritchie und Jacqui Ainsley werden offenbar schon wieder Eltern: Bei einer Filmpremierre präsentierte Ainsley stolz ihren Bauch. Die beiden haben erst im vergangenen September ihr erstes gemeinsames Kind bekommen." Below the article are several smaller images and captions, including "Der tägliche Star-Sinn", "Umstandsmode: Reese Witherspoon", "Camilla außer Rand und Band", and "Twitter + Co.: Star-Gezwitscher". A vertical sidebar on the left lists names: Jessica Alba, Rumer, Scout + Tallulah, Katie Holmes, Sienna Miller, Blake + Ryan, William + Kate, Suri Cruise, and Bobby Dekeyser. A small advertisement for Gala magazine is visible in the top right corner.



2.0 – Reach a target group using data

**Interests: food,
restaurants and
fashion**

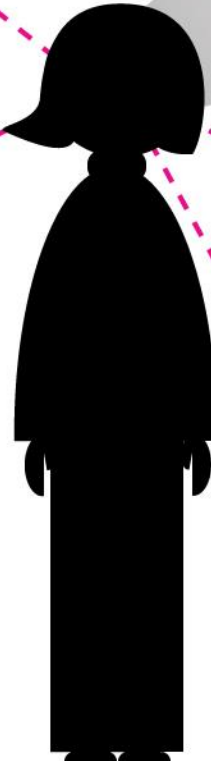
85%

of advertisers and agencies
use audience data in their
media buying

**Offline:
attends cooking
classes and likes
pop music**

**In-market:
highly likely to
buy a luxury vehicle
in the next 6 months**

25-34 year old mum

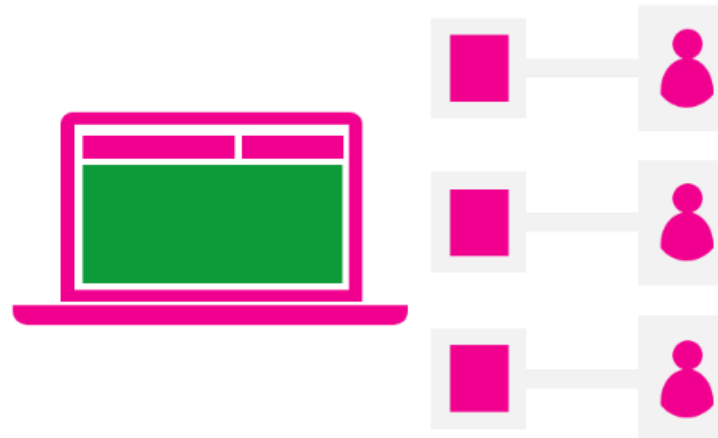


AOD - Our programmatic product

From
traditional...



...to addressable
media.



AOD / AUDIENCE
ON DEMAND®

Real Time Advertising (RTA)

- Private inventory
- Premium quality
- Publisher relationships
- Big and standard formats
- Exclusive and private auctions

Programmatic approach starts spreading into TV as well



NBC Universal will start selling TV advertising programmatically as of this fall!

ZenithOptimedia
The ROI Agent

This vision is not that far away in Switzerland



Sales joint venture:
Ringier, Swisscom
& Publisuisse -
programmatic
products

with Optimedia
The ROI Agent

Programmatic spreads even into OOH media



Moovel ad campaign delivered different messages depending on daytime and weather forecast

The future
of certification

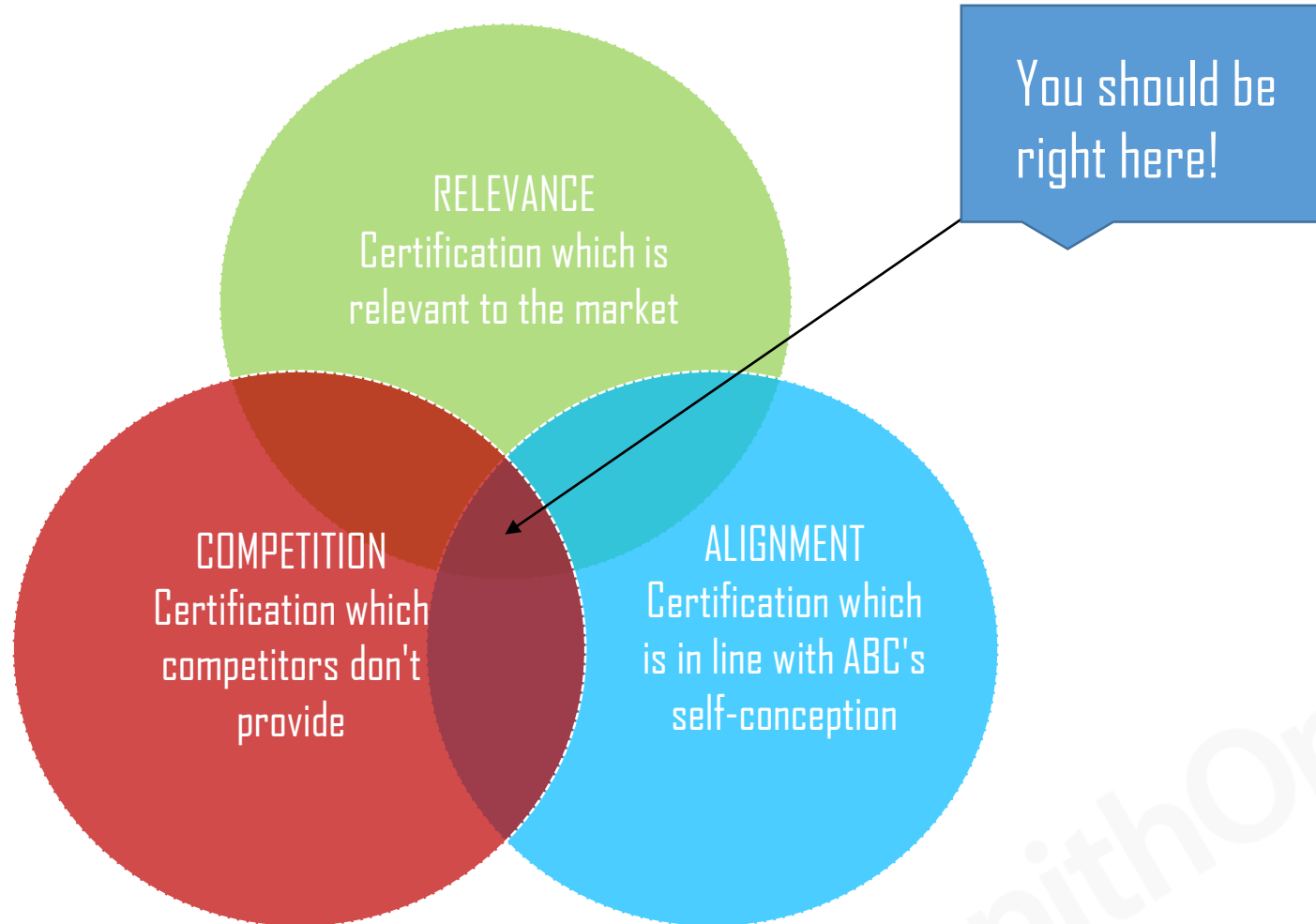


Do agencies still care about certification?

YES, we do!
Sorry we don't
show our love.
It's not personal.
We've just got used
to it being around.

mithop
The Ol Agency

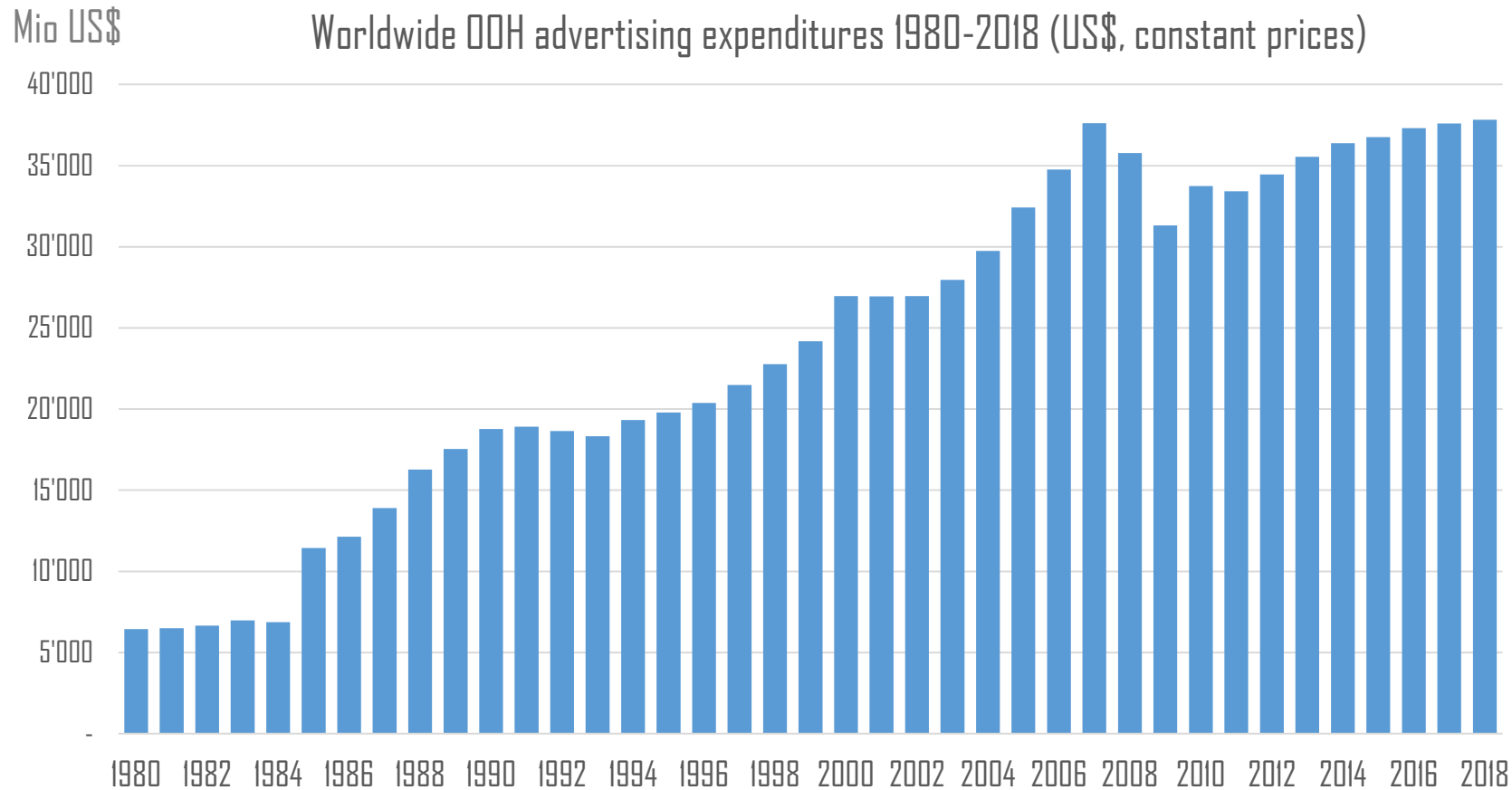
ABCs need to define their future area to play



Here are three ideas to grow...

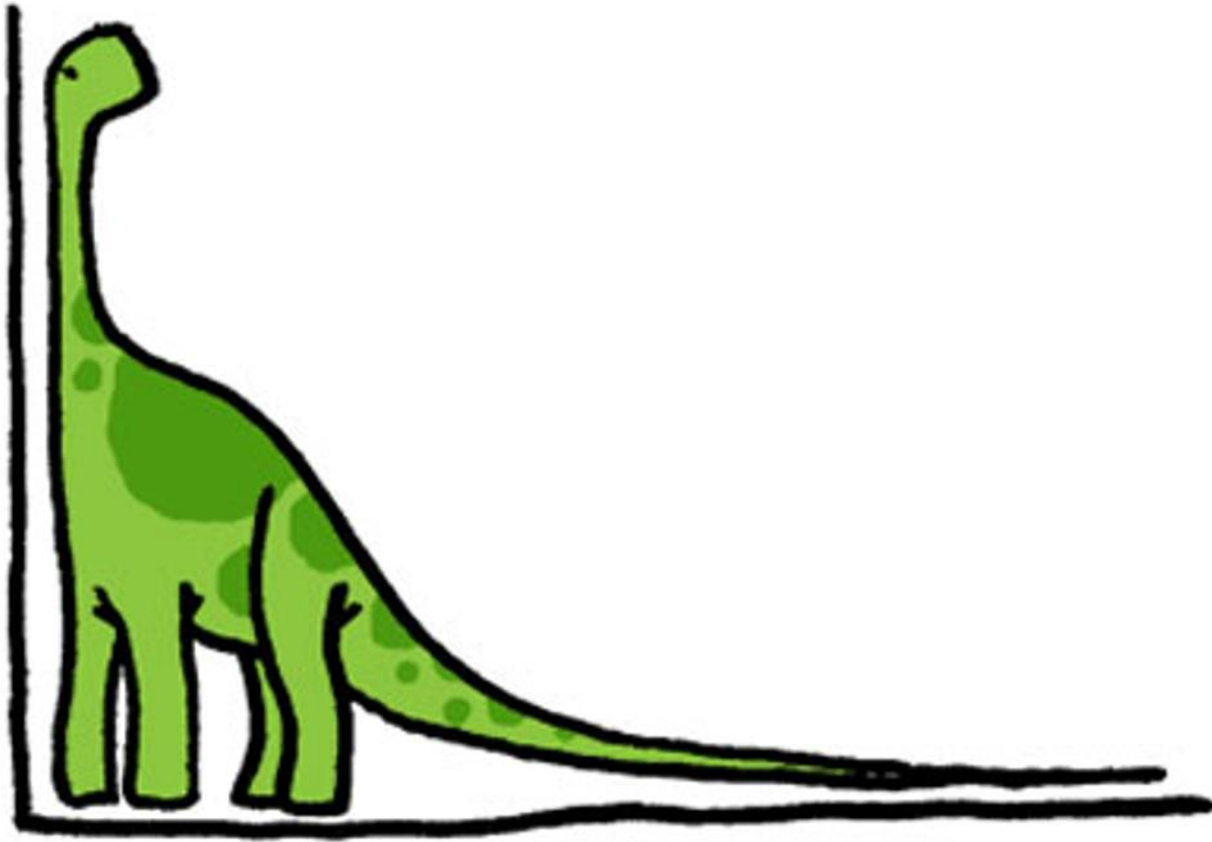


1. Out of Home certification is a great area to expand



Great reach
Great innovations
Great prospects
No ad blockers

2. Think about long-tail digital certification

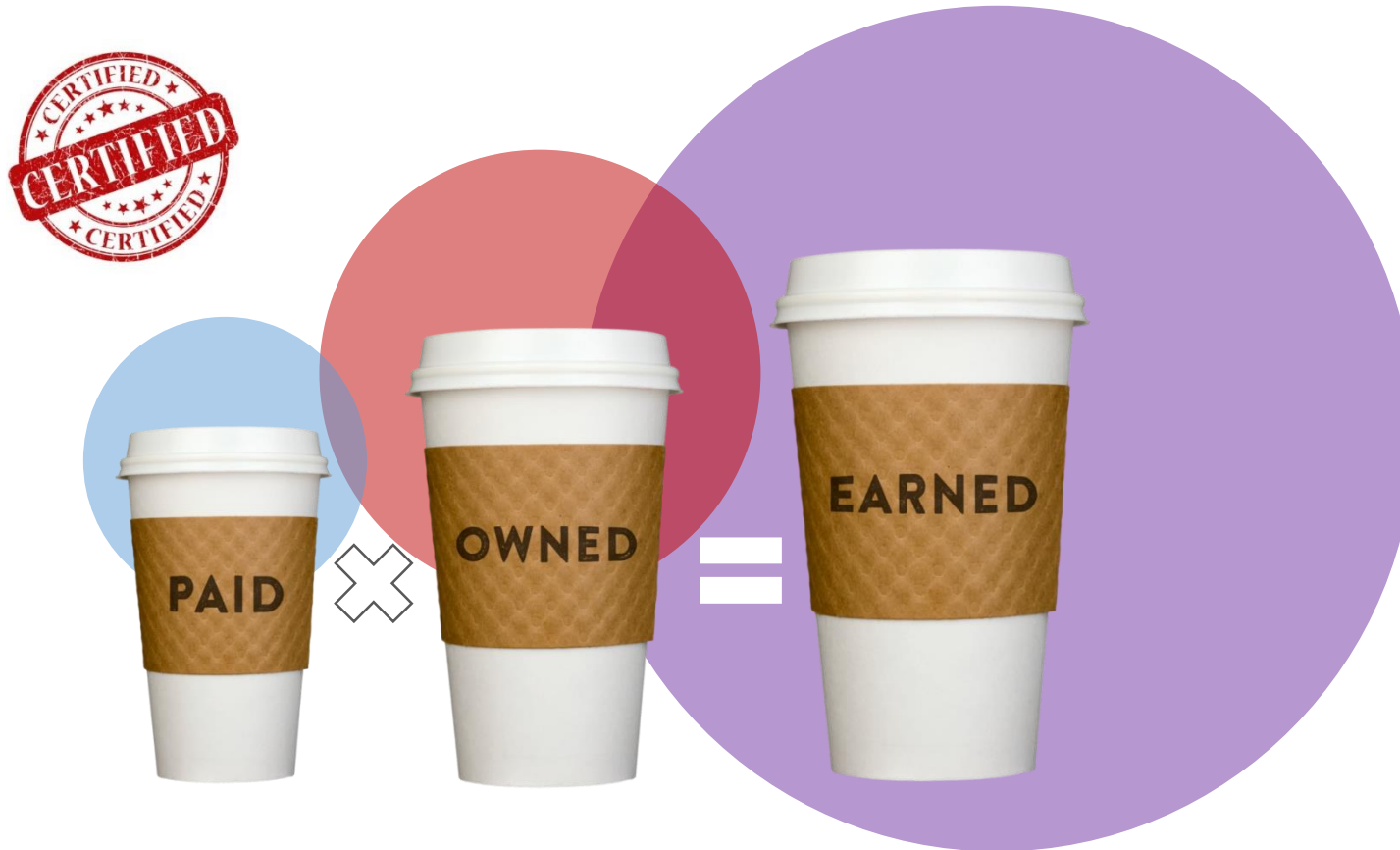


Certification of digital programmatic contacts is done by Google

ABCs Certifying long-tail digital network inventory e.g.

- Activity status
- Unique Users per period
- Qualitative criteria

3. Make certification an open-source system



Certification should be open to include all kinds of touchpoints including paid, owned and earned

One big future challenge for ABCs



Find a way to define a clear ABC role regarding the blurred line between certification and measurement!



And now...
time to talk!