

It's time for audience measurement to catch up with media consumption



D3CON

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MOGENS STORGAARD JAKOBSEN

CHIEF SALES OFFICER, AUDIENCEPROJECT

AudienceProject 

AudienceProject is a Danish cross-media measurement company challenging the status quo

- Pioneering cross-media audience measurement for **10+ years** to an industry that said it wasn't possible
- Delivering **unified audience analytics** across completely separate AV media and channels
- Helping brands turn uncomfortable truths into **business benefits**
- Applying **best-in-class technology** to robust statistical research practices





esome™



group^m



L'ORÉAL



OMG Omnicom
MediaGroup

PANDORA

pilot



 Sparkasse

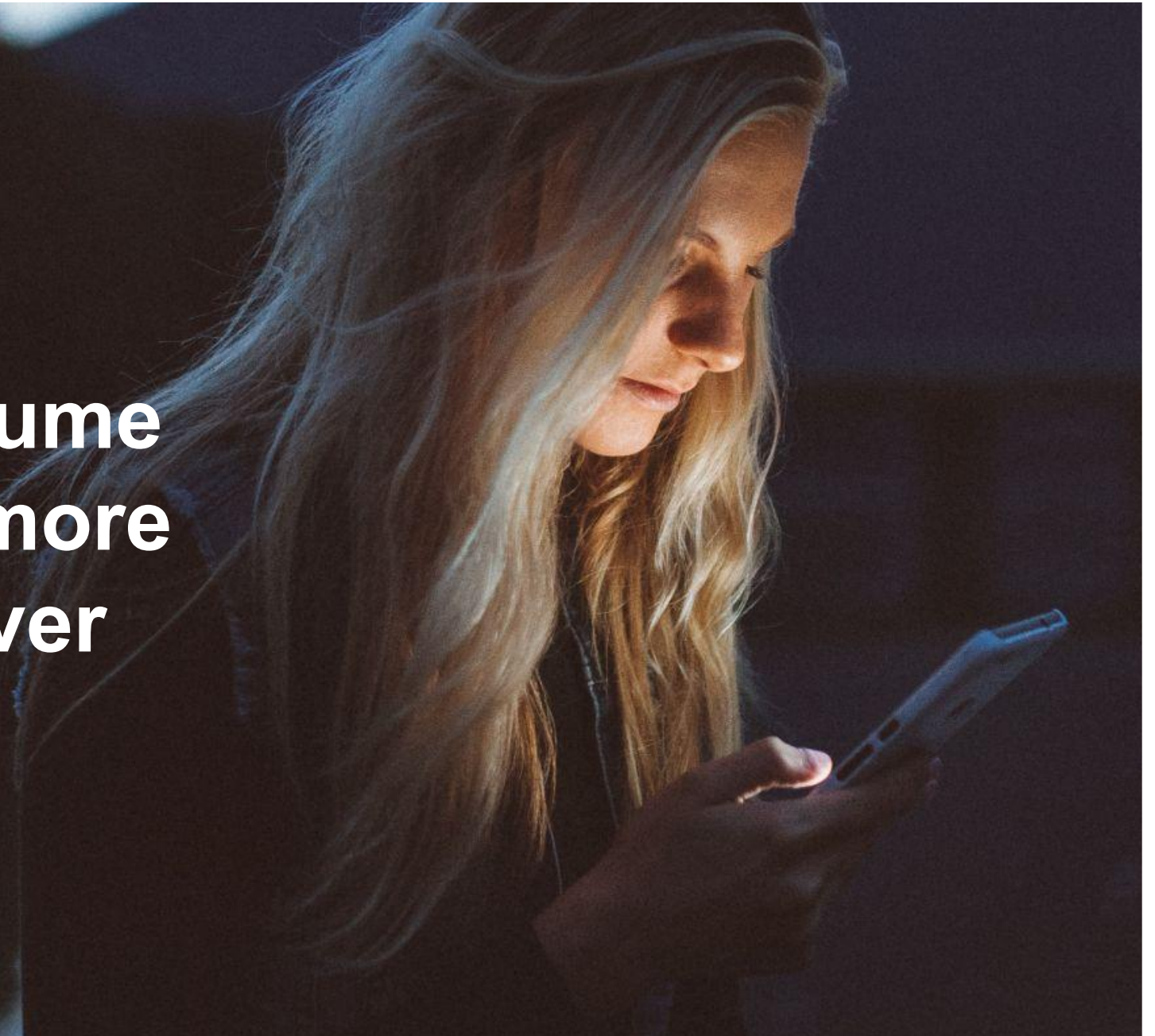


WELEDA
Seit  1921

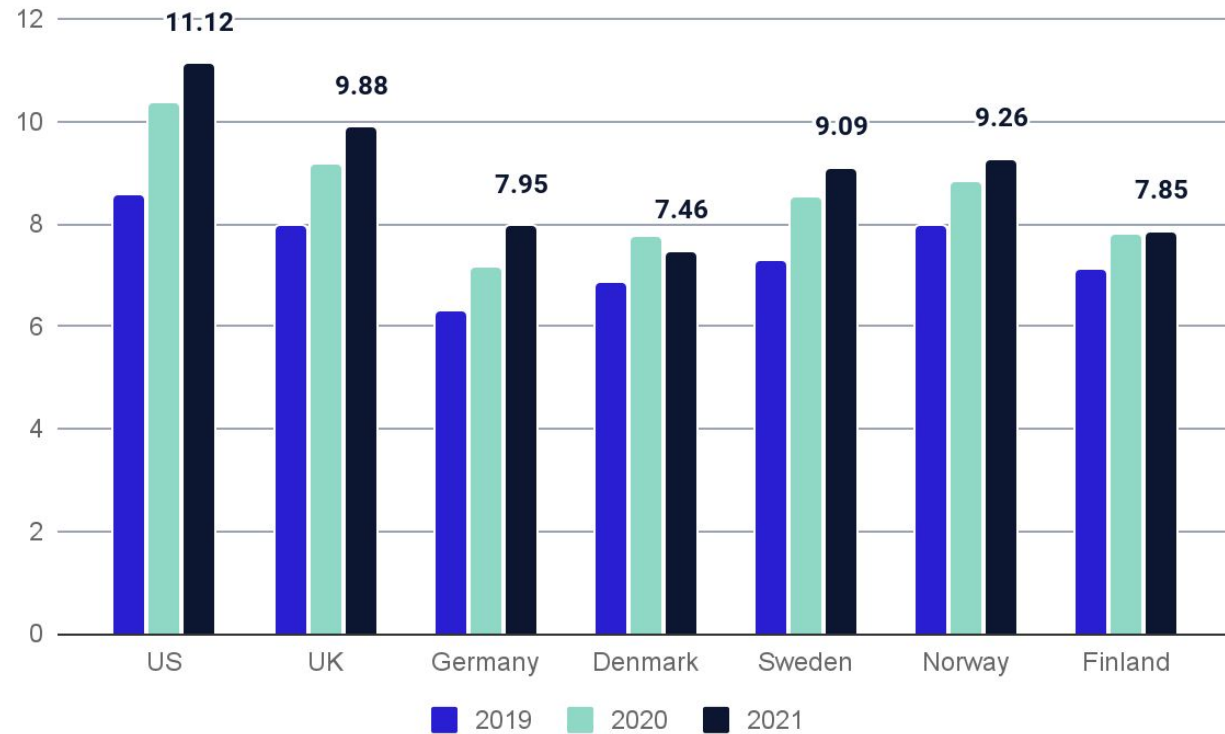


What is the problem?

**Audiences consume
content across more
channels than ever**



The number of connected devices that people on average have access to in select markets

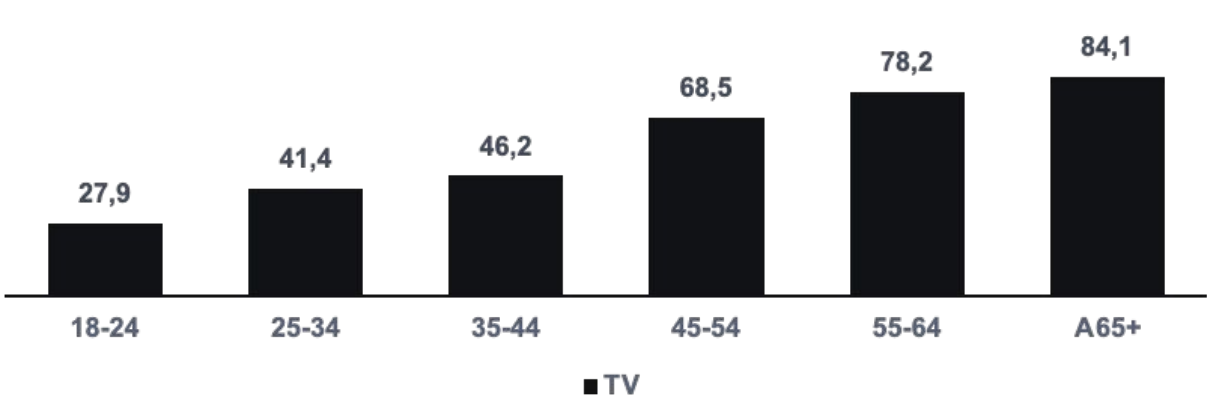


Media consumption

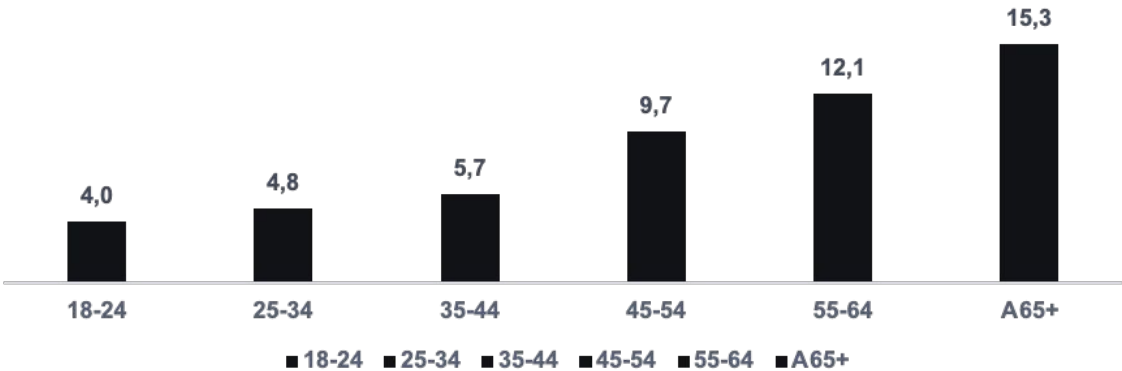
People access the internet from an increasing number of devices

Source: AudienceProject Insights 2021: Device usage

Linear TV campaign reach across age groups



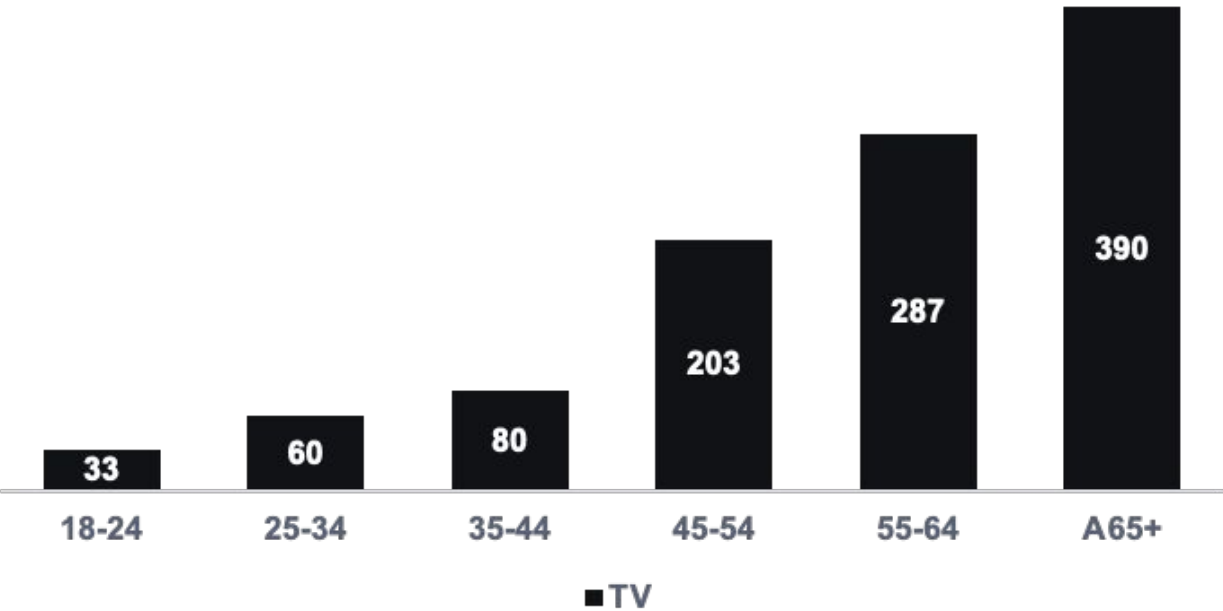
Linear TV campaign frequency across age groups



If no digital is added, an advertiser with a broad 18-65 year target audience will in effect end up spending 64 % of the budget on 55+



Distribution of TRPs across age-groups



Today's fragmented media landscape challenges advertisers



t-online.



How can I
improve our
marketing
budget ROI?

Multiple partners, multiple reports



"Who actually sees my ads?"

*"Am I reaching 20 % of females
10 times or 80 % 2 times?"*

*"Am I investing my
ad dollars efficiently?"*



**Why is cross-media
audience measurement
a ‘hard problem’?**

Technology and legislation



**New technology
and new legislation
create significant
challenges**

Evolution of digital advertising

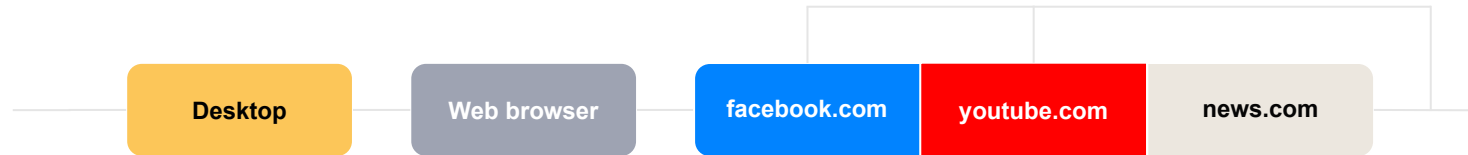


**Mega trends in how
digital advertising
evolves create
significant challenges**

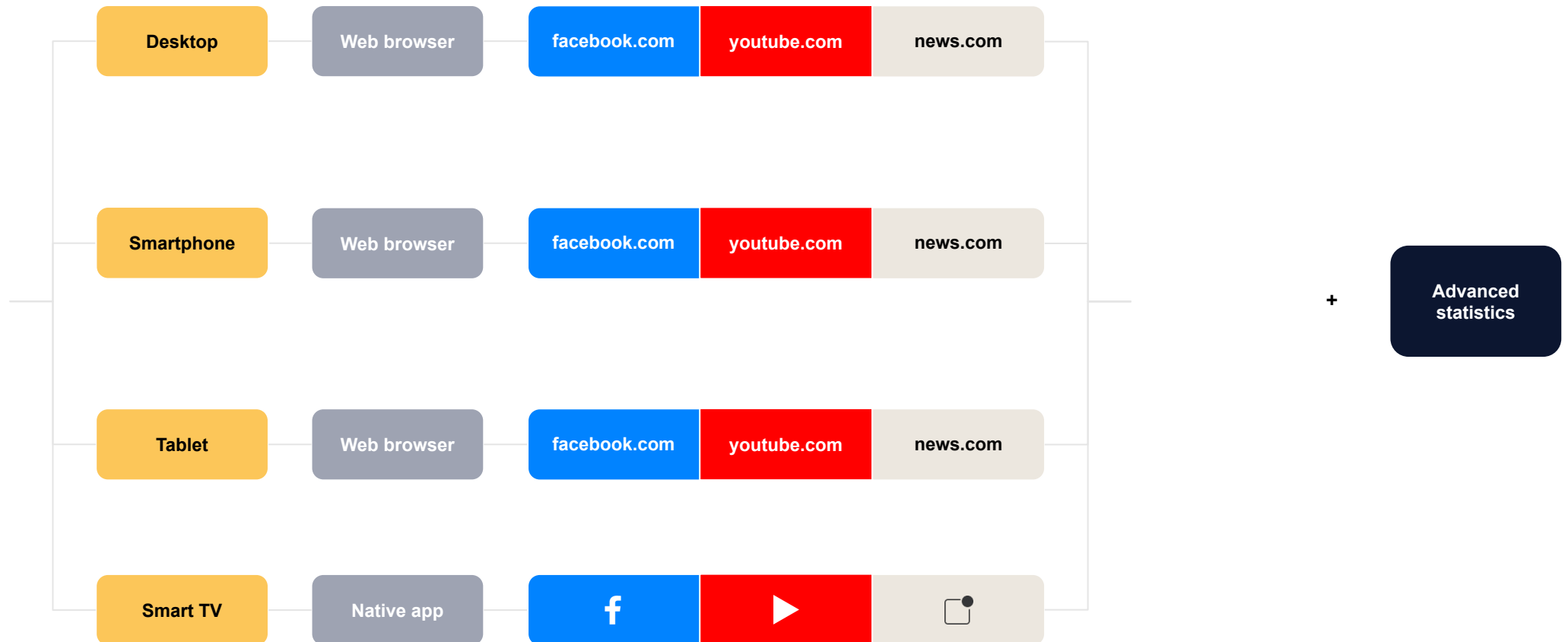
New technology and new legislation result in a vastly more complex digital landscape in which to carry out audience measurement



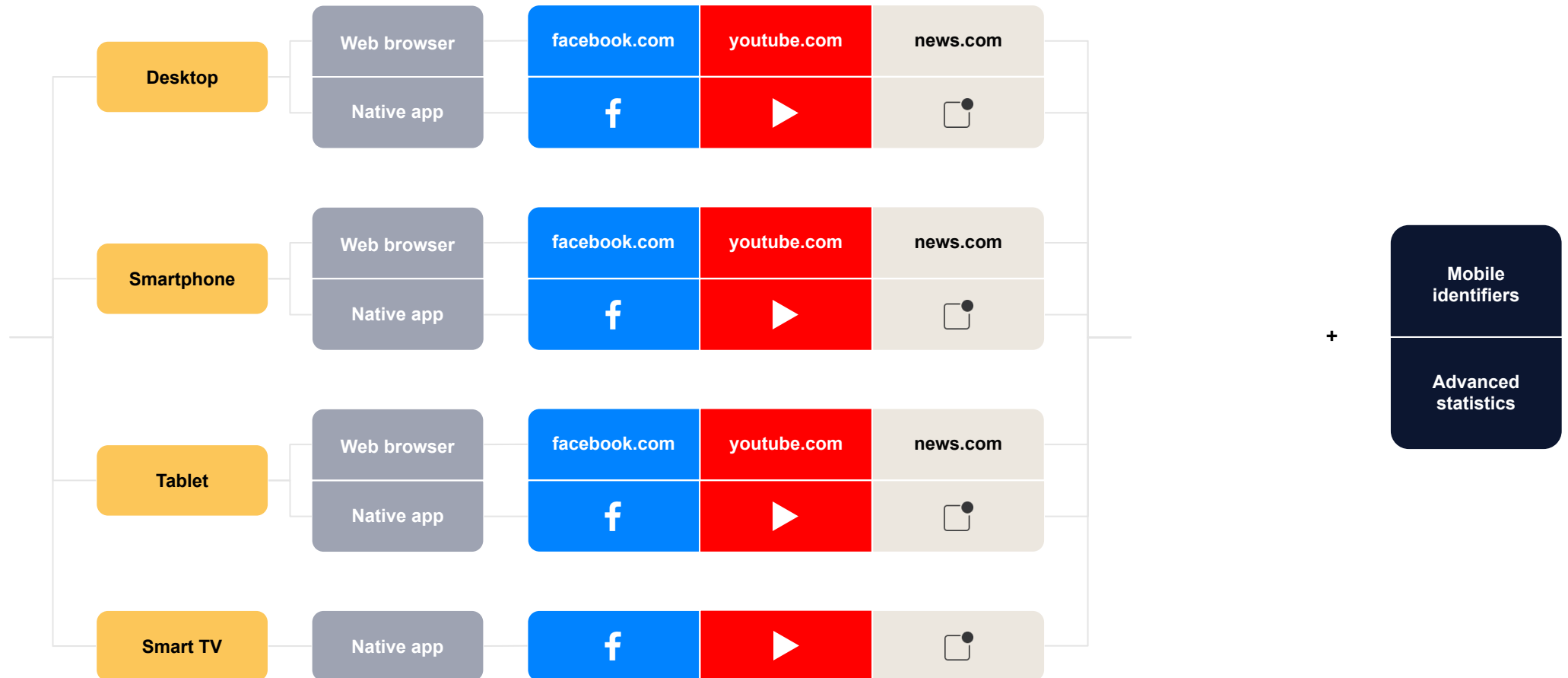
The simple life of digital measurement ...back in day



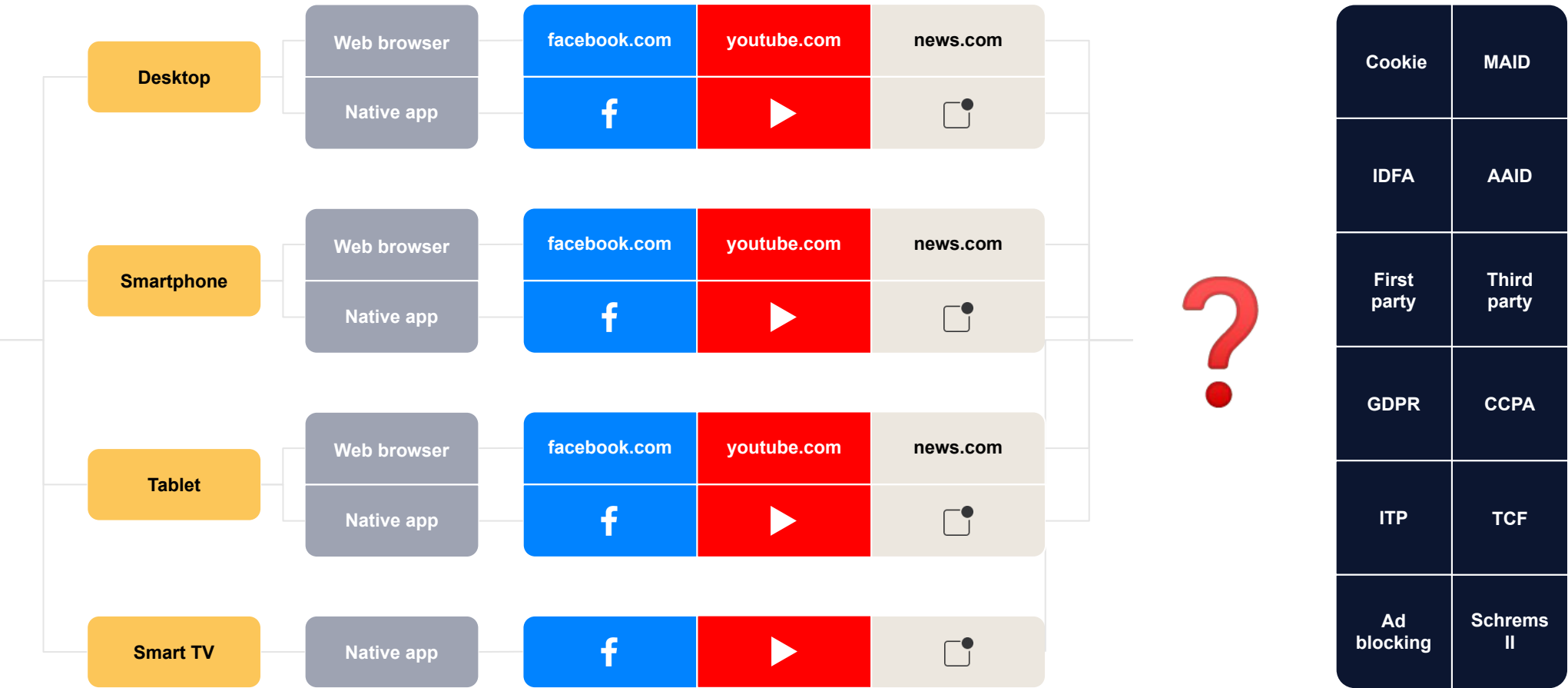
The ~~simple~~ life of digital measurement ...for not too long a ago



The complicated life of digital measurement ...a little while ago



The very complicated life of digital measurement ...as of today



**Mega trends in digital
ad spend also have
an impact on what
and how to measure**

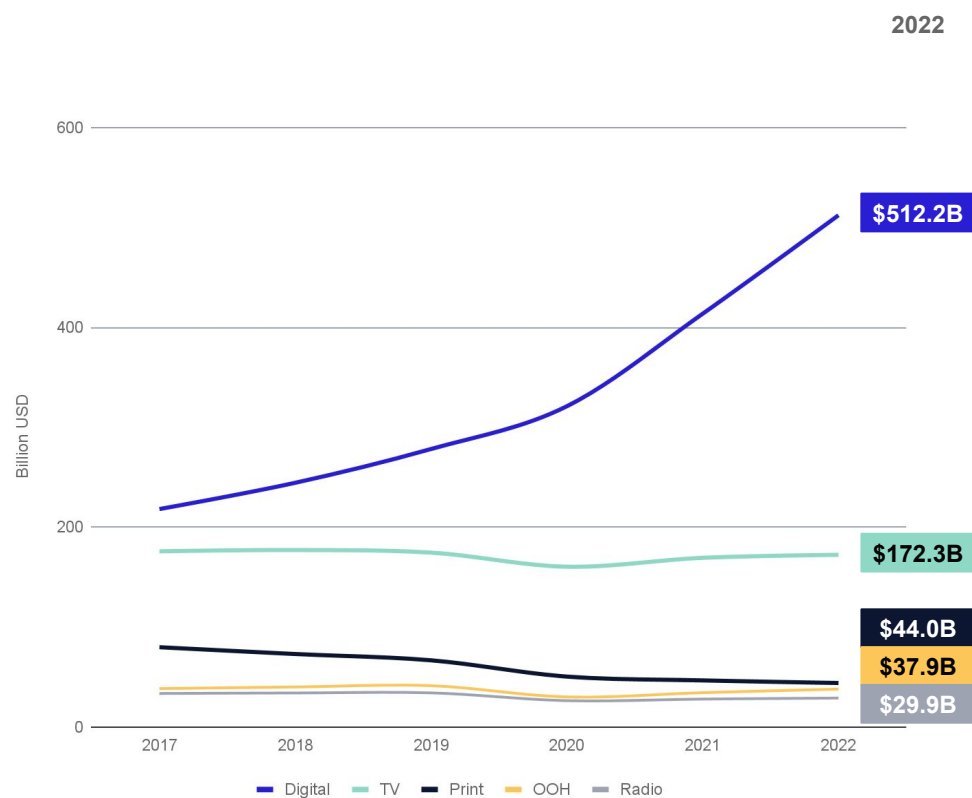


MEGA TREND 1

Ad spend moves towards digital media channels



Global ad spend: \$795.2B



Digital's share of global ad spend

2017: 40%

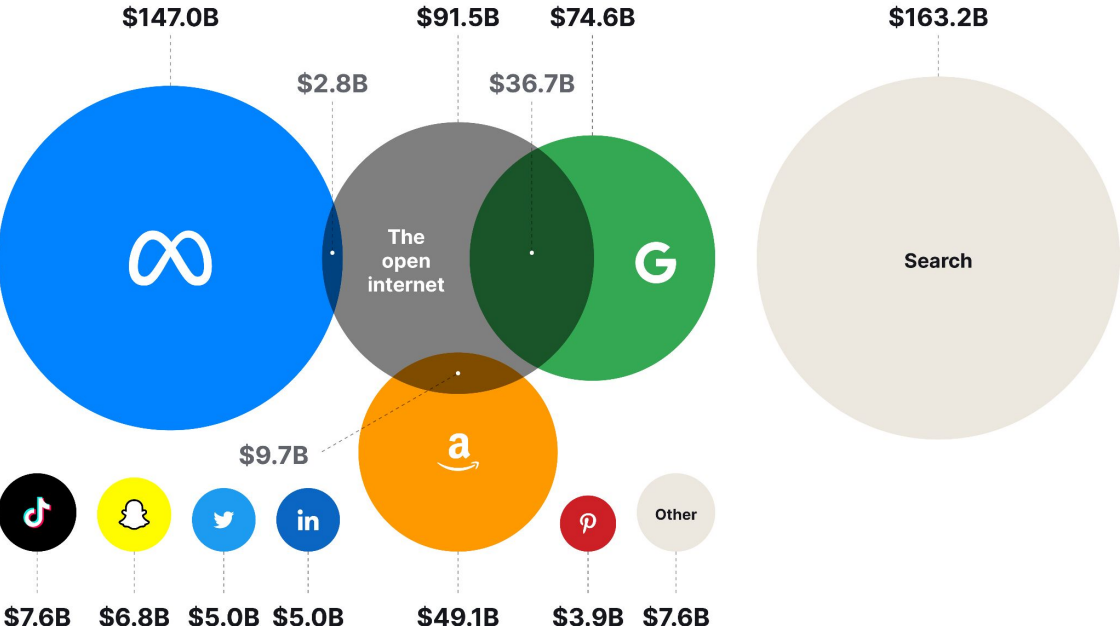
2022: 64%

Growth in share of ad spend: 61%

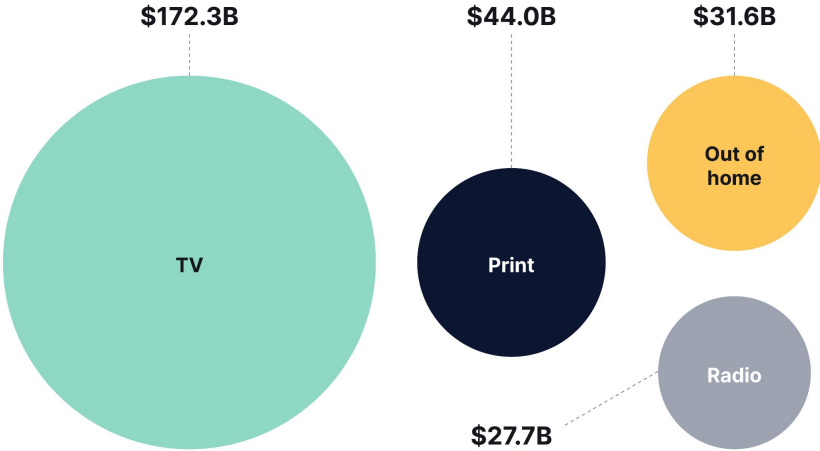
2017: \$218.1B / \$545.6B (40%)

2022: \$512.2B / \$795.2B (64%)

Digital ad spend: \$512.2B



Non-digital ad spend: \$283.1B



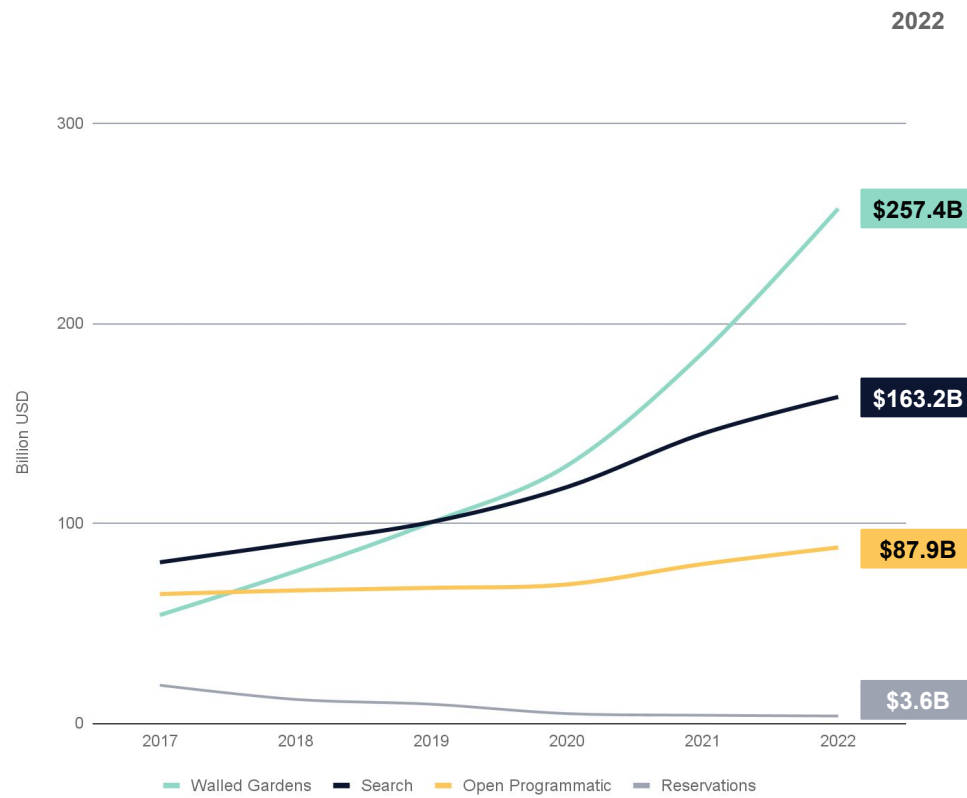
Source: Jounce Media: The State Of The Open Internet

MEGA TREND 2

**Digital ad spend is
dominated by
walled gardens**



Digital ad spend: \$512.2B



Walled gardens' share of digital ad spend

2017: **25%**
2022: **50%**

Growth in share of ad spend: **103%**

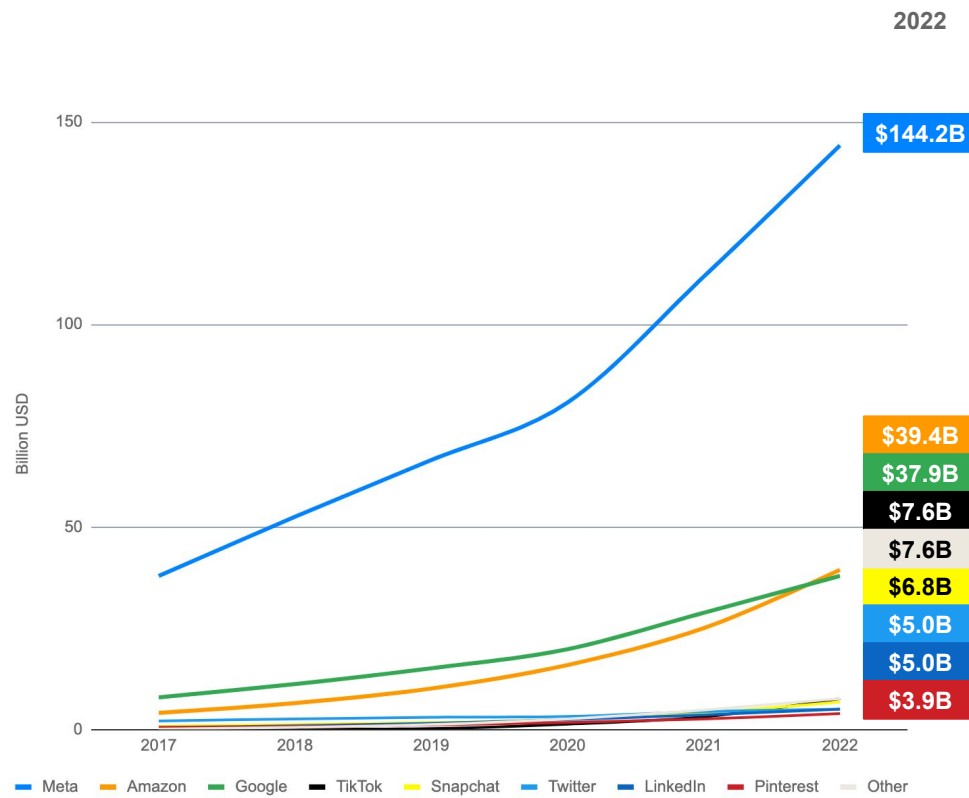
2017: \$54.1B / \$218.1B (25%)
2022: \$257.4B / \$512.2B (50%)

MEGA TREND 3

Digital ad spend consolidates within few platforms



Walled garden ad spend: \$257.4B



Top 5 walled gardens

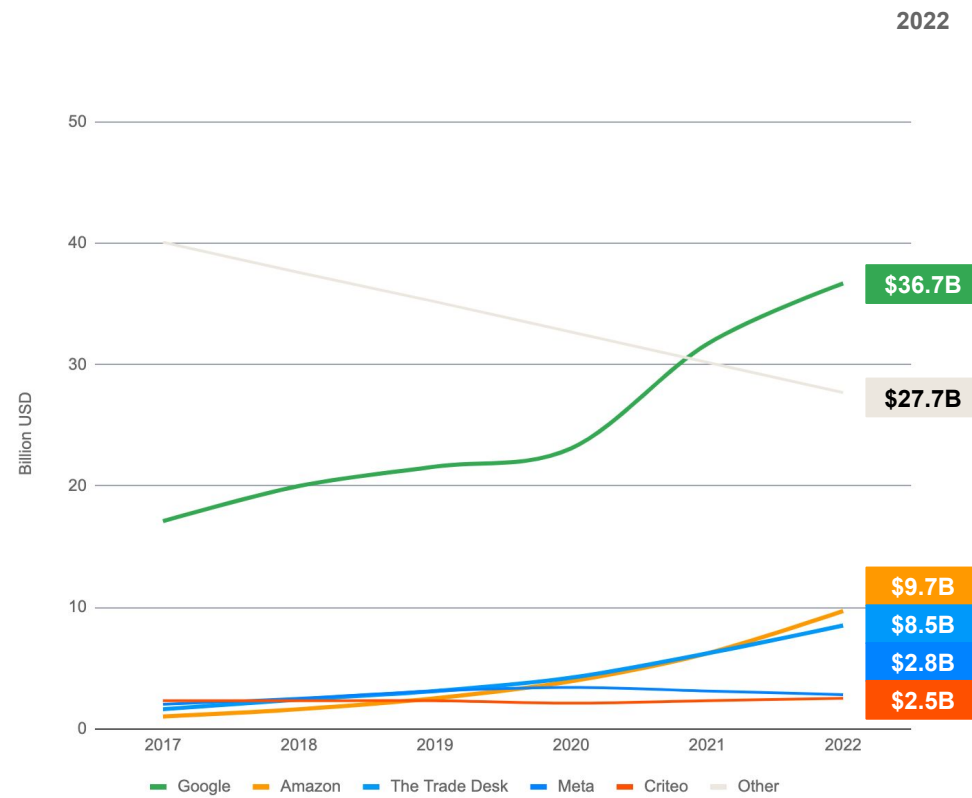
Share of total walled garden ad spend

2022: 92%

Top 5:
Meta, Amazon, Google,
TikTok and Snapchat

2022: \$235.9B / \$257.4B (92%)

Open programmatic ad spend: \$87.9B



Top 5 open programmatic platforms

Share of total open programmatic ad spend

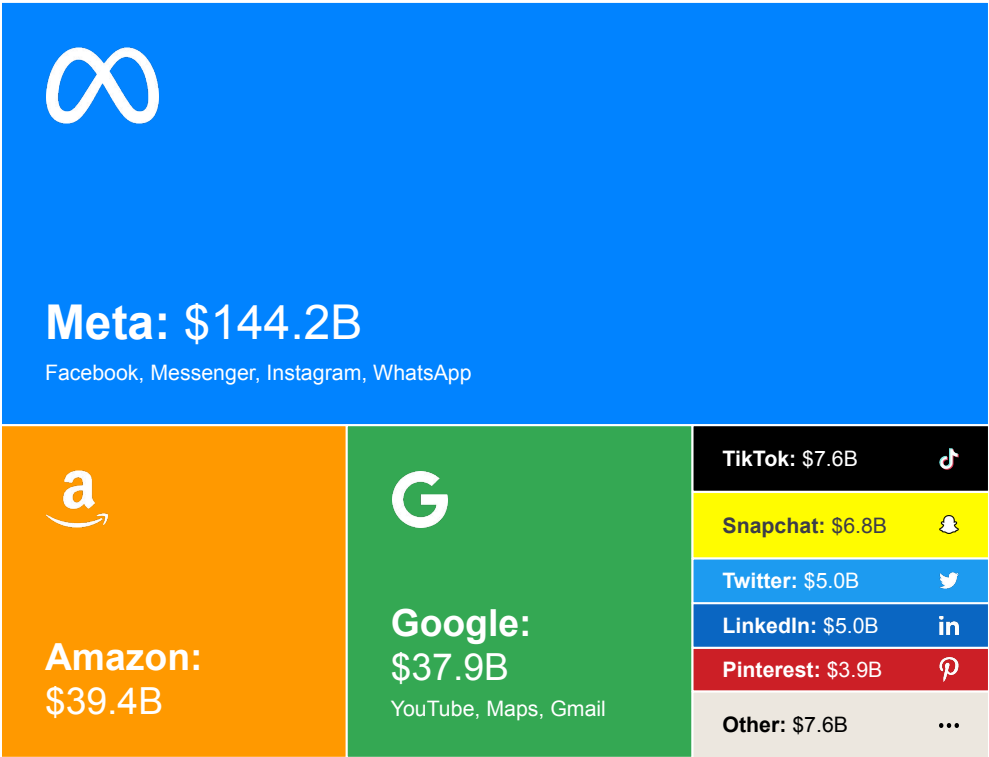
2022: 66%

Top 5:
Google Ads, Display & Video 360,
Amazon, The Trade Desk and Meta

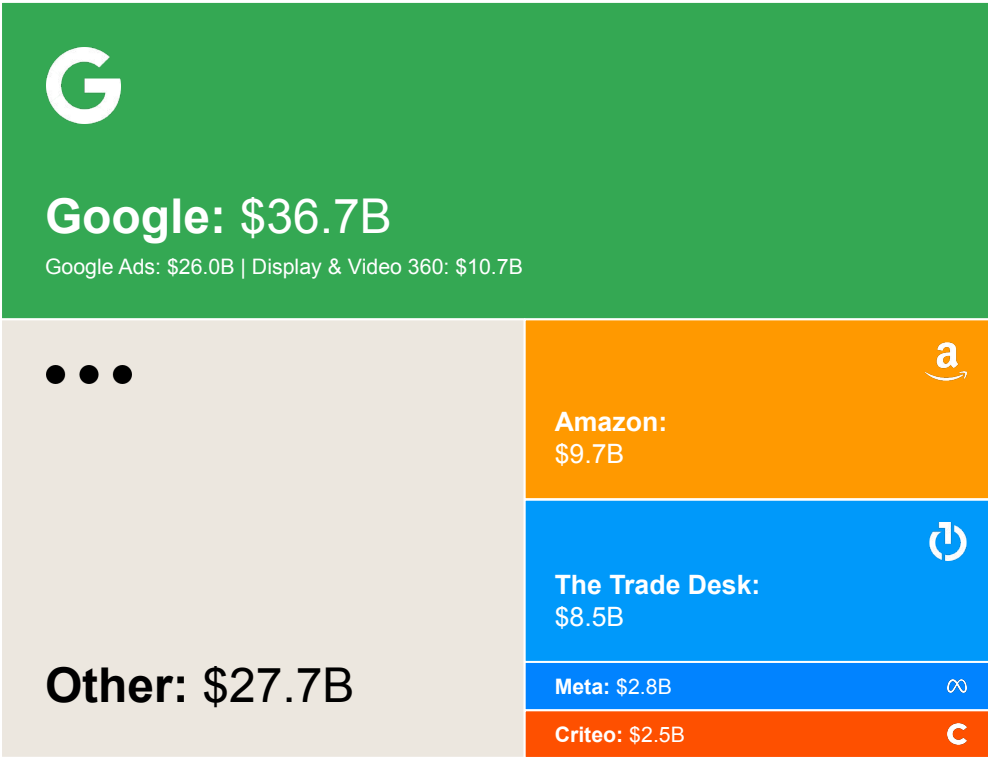
2022: \$57.7B / \$87.9B (66%)



Walled garden ad spend: \$257.4B



Open programmatic ad spend: \$87.9B



Source: Jounce Media: The State Of The Open Internet



Let's sum up...

Situation

>\$500B

ad market with little to no market transparency

- Poor campaign performance
- Inefficient allocation of advertising budgets
- Negative effect on brands and publishers

Advertiser needs



Holistic view of campaign performance against target audiences



Understanding of which channels reach and engage target audiences most effectively



Ability to determine how and where advertising budgets are spent most effectively

**...and third-party
cookies are dying**



**... but cookies
have been losing
their relevance
for years**





Walled gardens



The open internet



How to solve this?



Multi platform support

Often in the form of integrations with key walled gardens



Deduplication across channels

Without relying 100% on availability of universal identifiers



Privacy safe methods

For ~~tracking~~ measuring the open internet

Situation



No universal identifier to tie together media consumption across channels



Long list of identifiers for different channels (cookies, IDFA, AAID, Facebook login, etc.)



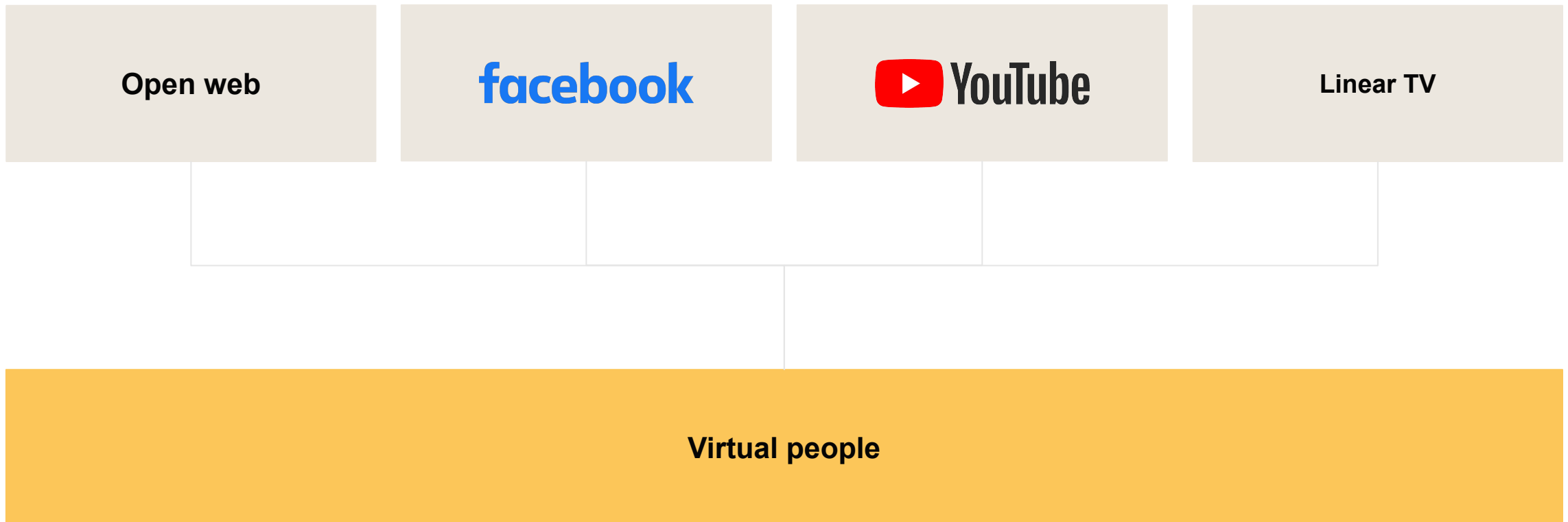
Multiple panels instead of “the panel”

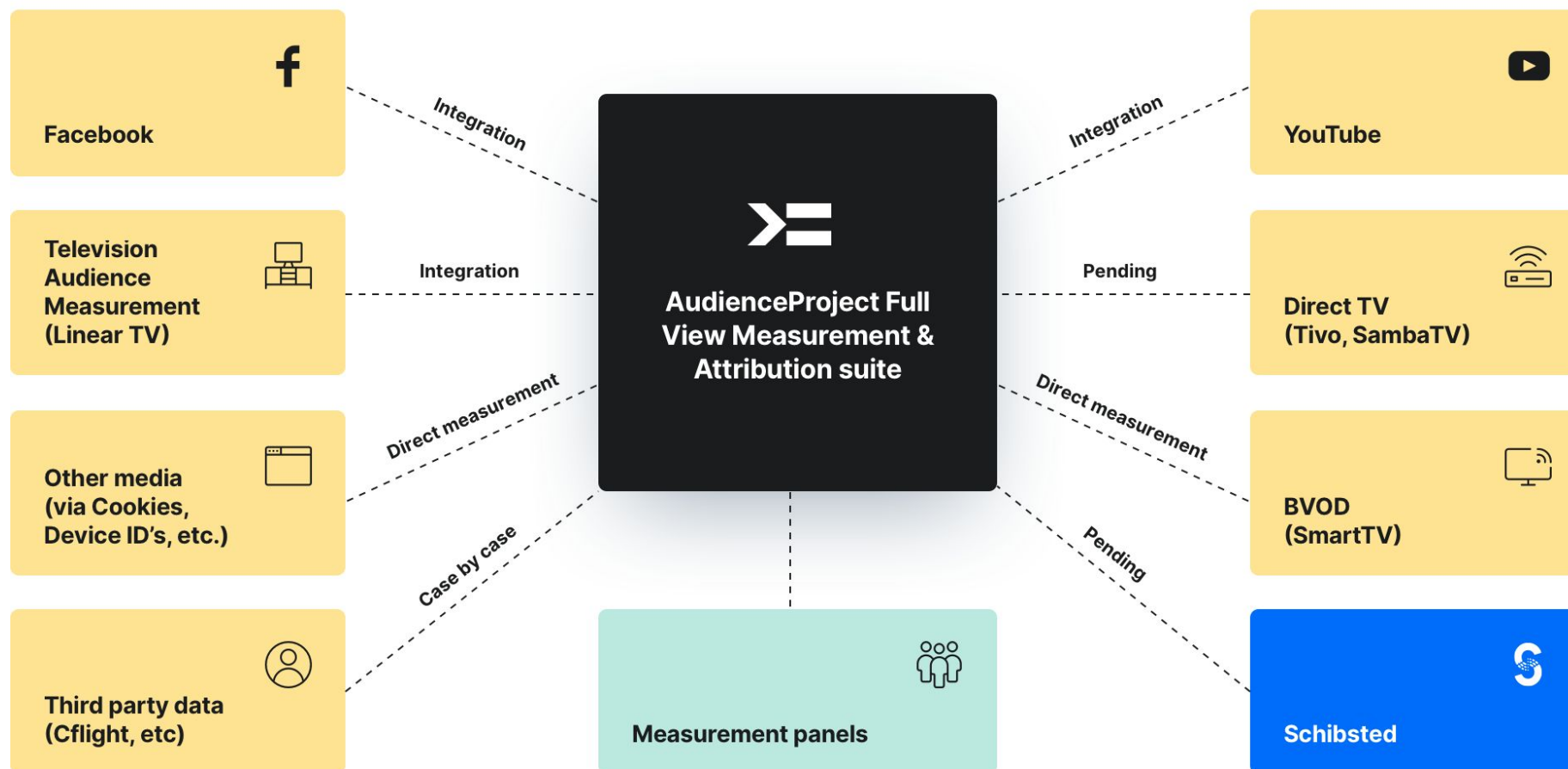
Challenge



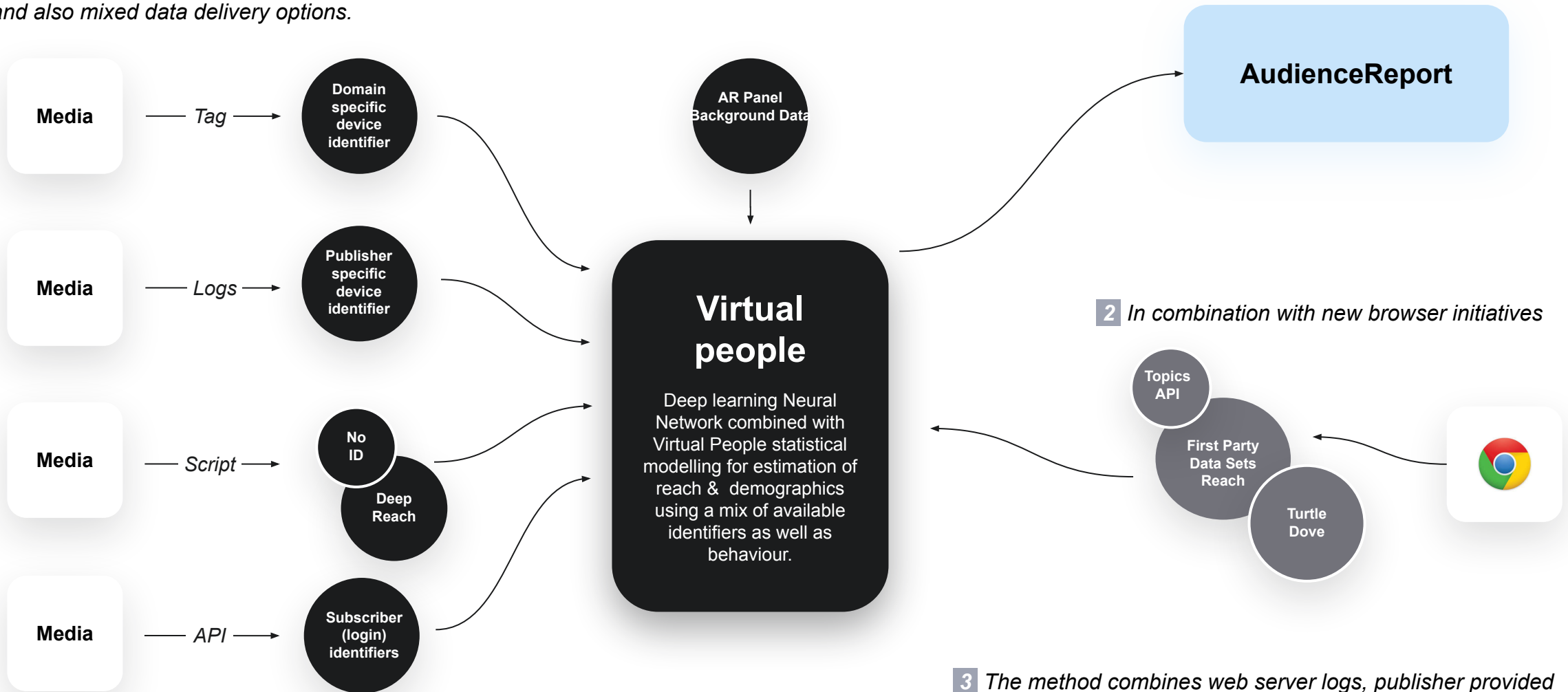
Different channels with different methodologies and panels must still be deduplicated for holistic overview

Different channels, different solutions, different data formats - no universal identifiers available





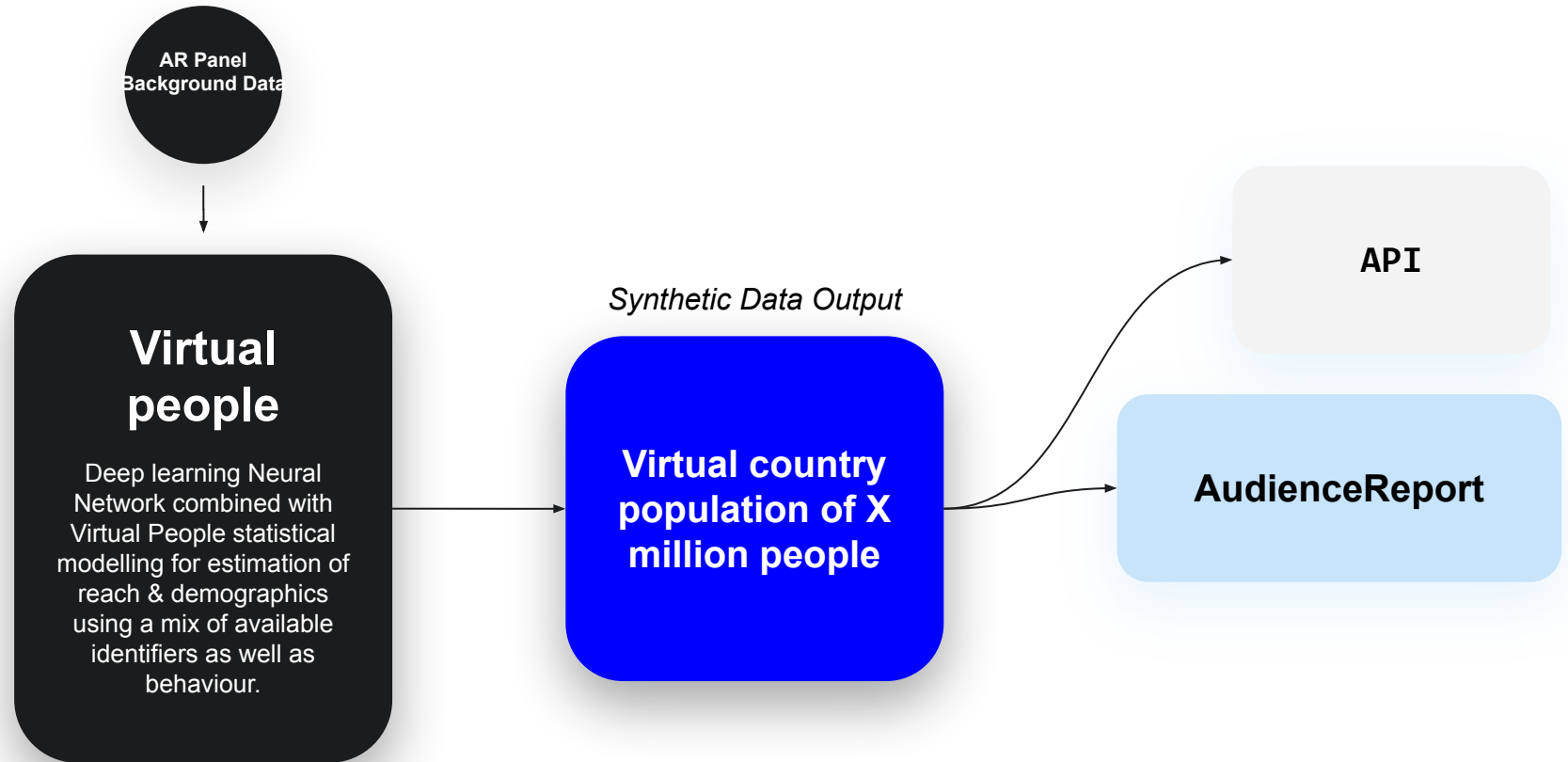
1 Supports a mixed identifier model as well as lack of identifiers, and also mixed data delivery options.



2 In combination with new browser initiatives

3 The method combines web server logs, publisher provided user data (PPD), census data, and a representative AP panel to produce corrected reach and frequency estimates by demographic audiences

1 Supports WFA North Star privacy sketch principles for measuring cross channel exposure

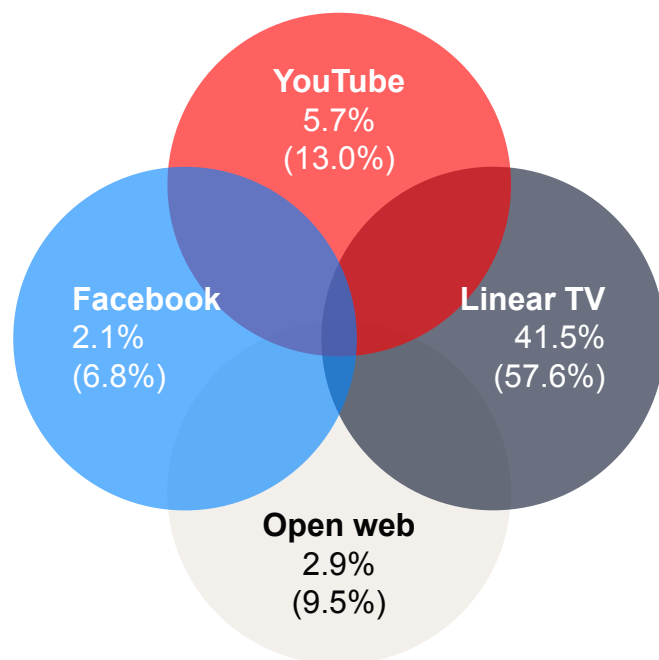


2 Supports a new reporting model delivering results in a fully virtualized finnish population with demographics and exposure profiles. Can be queried through API on any available dimension.

Real life case: Relative and absolute reach

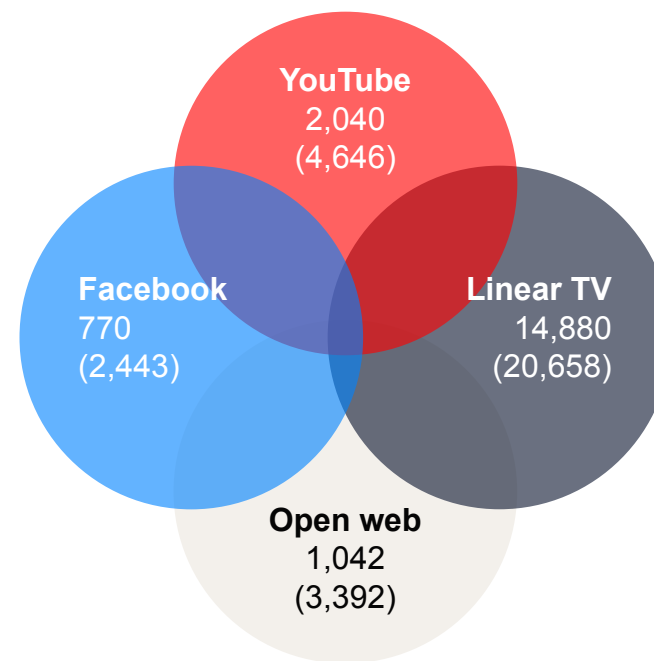


Unique and total reach
per media in percentage



69% in the target
group has been reached


Unique and total reach
per media in 1,000 persons



24,921,000 persons in the
target group has been reached

Real life case (with obfuscated numbers):
Cost per reach and incremental reach



 = best in class

	Investment in EUR	Reach in 1,000 persons	Reach in percentage	Incremental reach in percentage	Cost per reach point in EUR	Cost per incremental reach point in EUR
TV	2,323,258	20,658	57.6%	41.5%	40,334	55,982
Facebook	151,100	2,443	6.8%	2.1%	22,221	71,952
YouTube	62,651	4,646	13.0%	5.7%	4,819	10,991
Open web	177,197	3,392	9.5%	2.9%	18,652	61,102

Questions answered

What is the net reach of my campaign?



How often did my target audience see my campaign?



Which channels are most effective at reaching my target audience?



How much incremental reach have the different channels generated?

Benefits gained

Extend in-target audience reach



Improve in-target audience accuracy

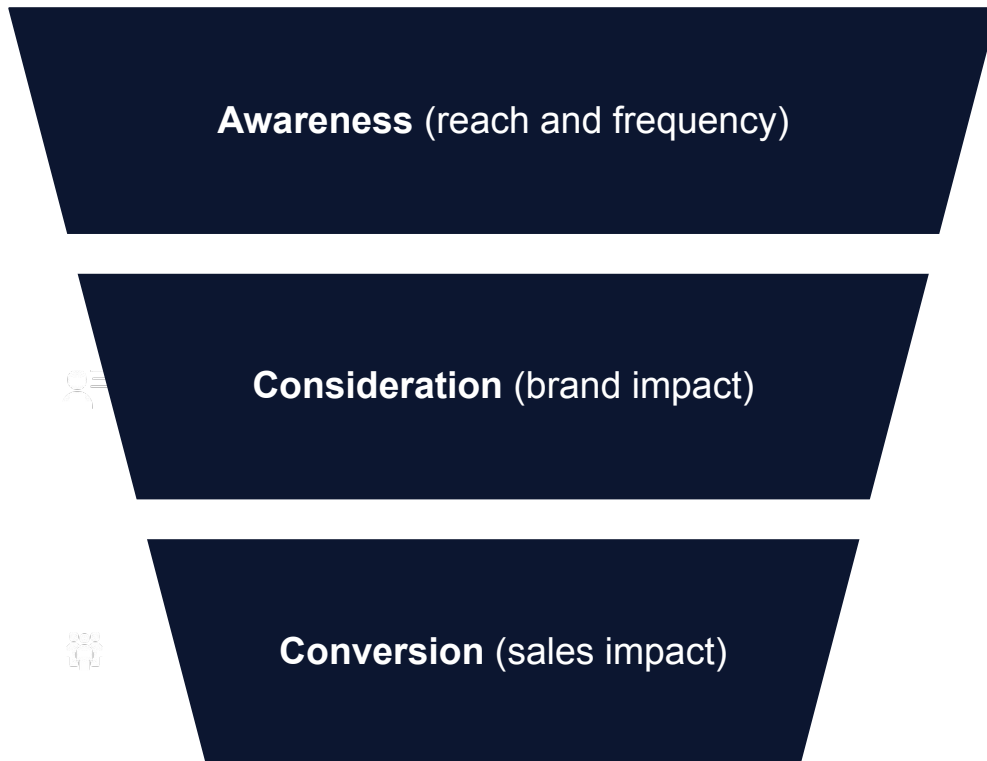


Reduce excess audience frequency



Optimise cost of total reach across channels

Marketing funnel



Holistic measurement



**Holistic audience
measurement throughout
the entire marketing funnel
is crucial**

**The only constant
in life is change...**



AudienceProject >=