

The Rise of the Visual Web

Steve Thompson
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April 2017

Hello

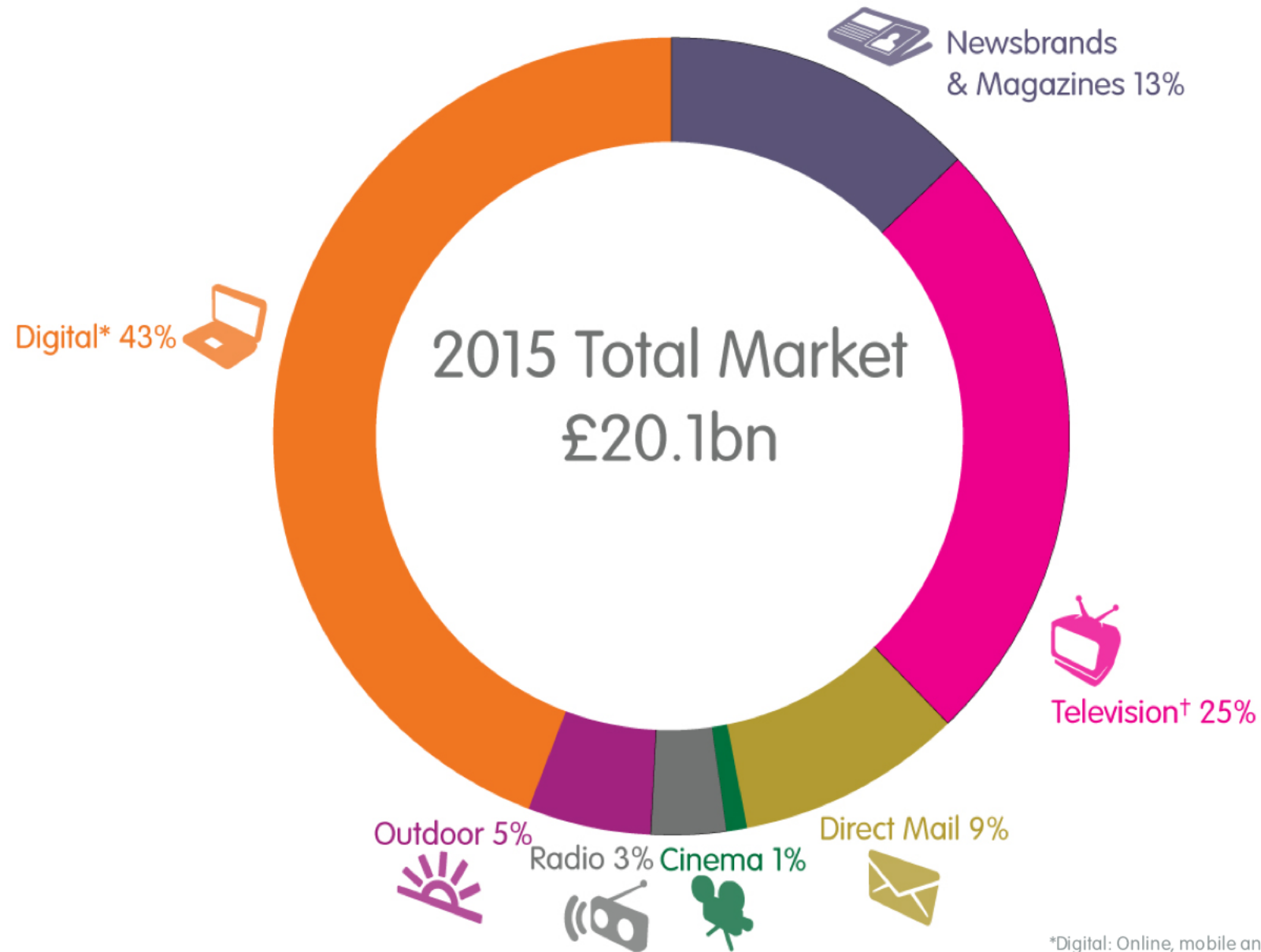
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Marketplace today

iab

Digital = 43% of a £20.1 billion market



*Digital: Online, mobile and tablet. Includes broadcast VOD and digital news / magazine brands

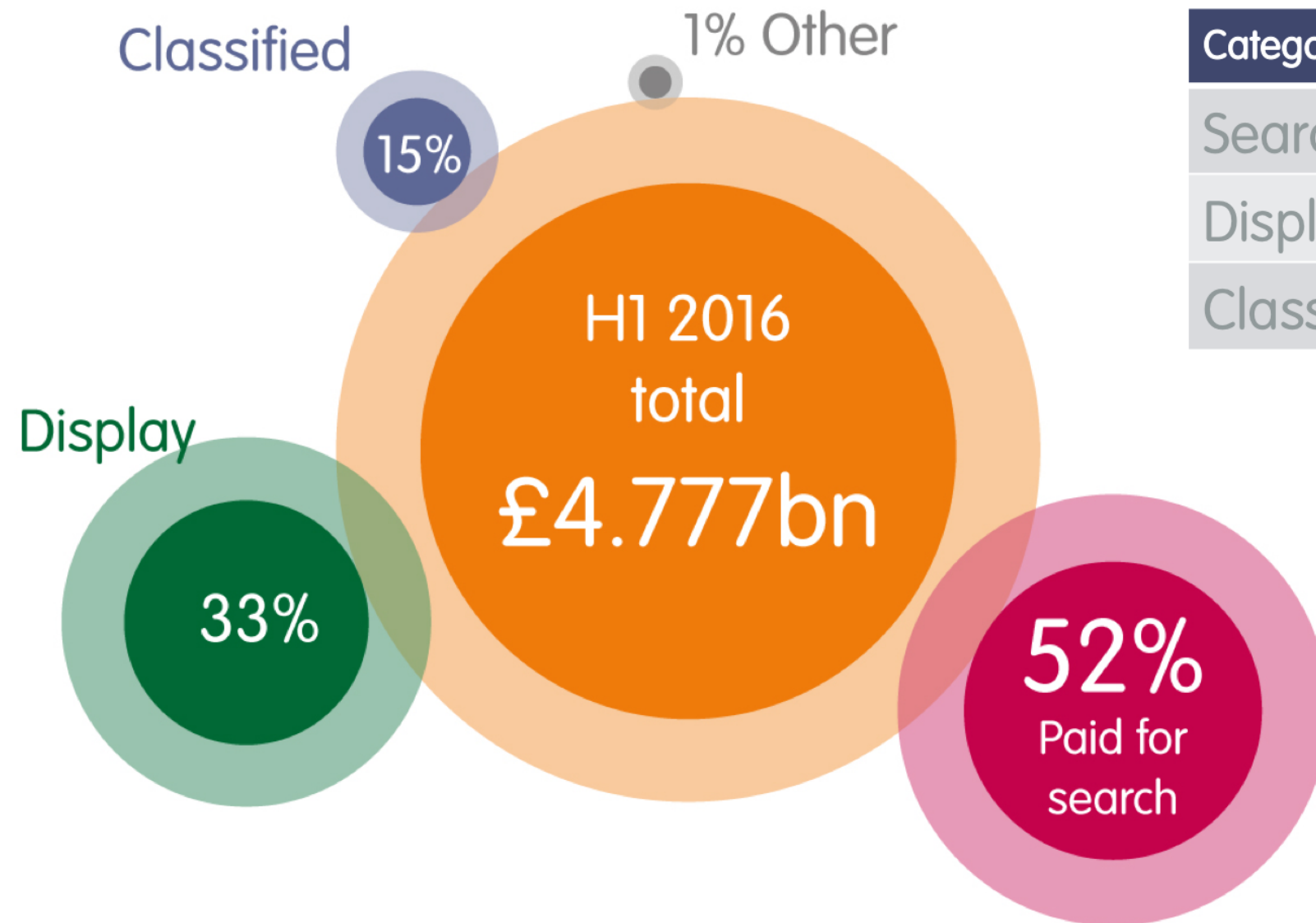
†TV: Includes Spots, TV sponsorship and 'other' revenue (such as product placement).

SOURCE: IAB / PwC Digital Adspend 2015 and WARC

Digital advertising breakdown

iab

Display reaches a third of digital in H1 2016



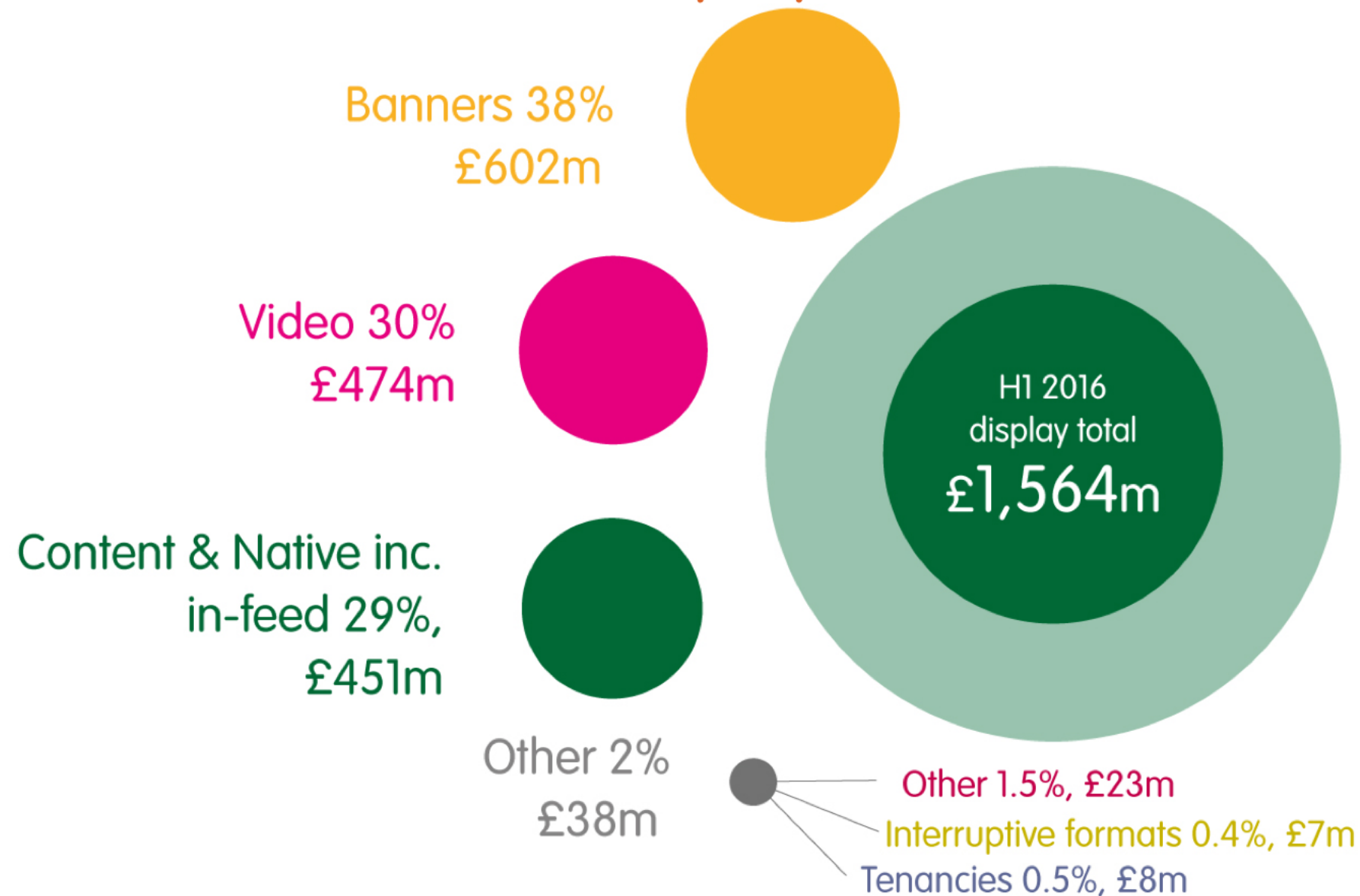
Category	H1 2015 Share
Search	51%
Display	31%
Classified	16%

SOURCE: IAB / PwC Digital Adspend H1 2016

Display advertising

iab

Video is now 30% of display

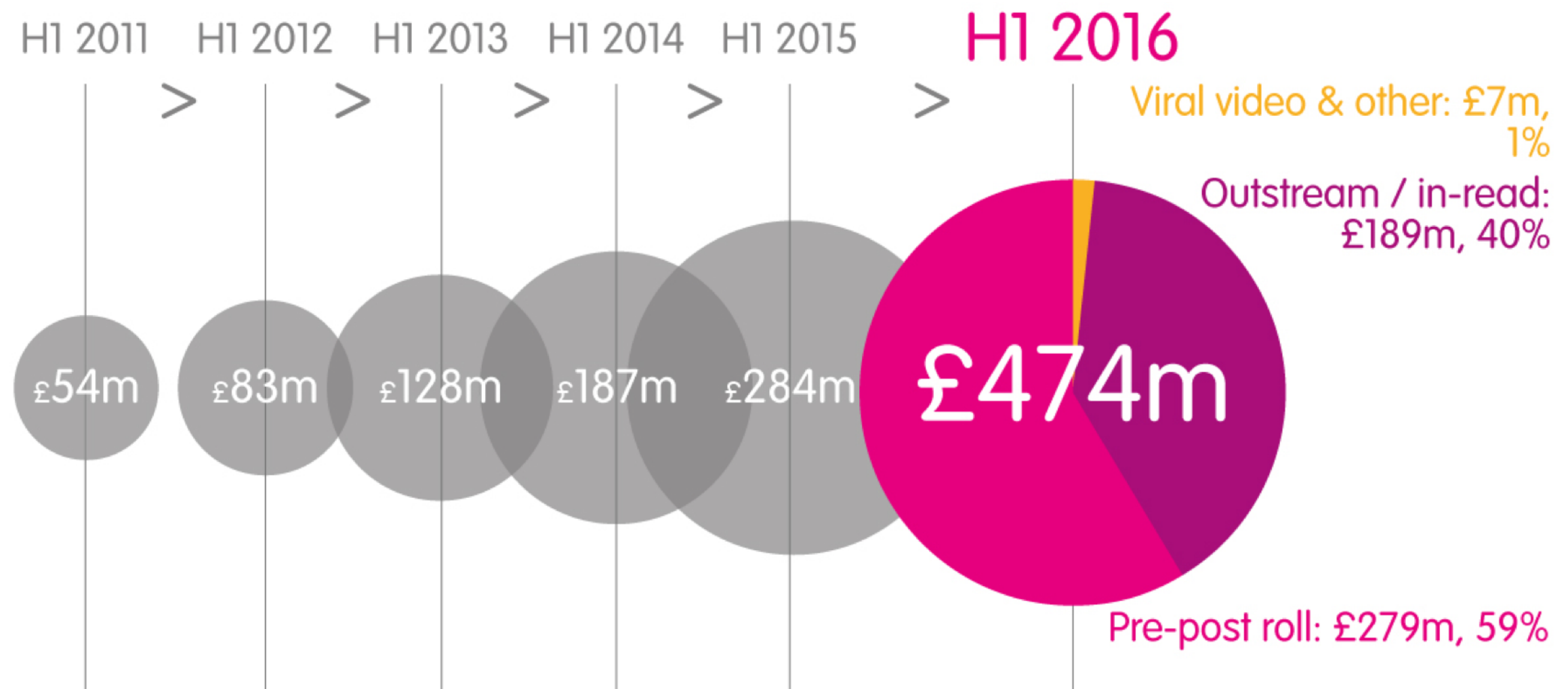


New for 2014: Content marketing = paid for sponsorship, advertisement features, in-feed & native distribution tools.. New for 2015: Tablet is no longer in 'other' and is now folded into relevant categories within digital. Banners in social are no longer split out separately and are now folded into Banners.. SOURCE: IAB / PwC Digital Adspend H1 2016.

And with video...

iab

Video increases by 69% since H1 2015



For 2011 onwards revenues for online video advertising on TV broadcaster websites are based on WARC estimates
SOURCE: IAB / PwC Digital Adspend H1 2016 / WARC

Emerging trends

THEN

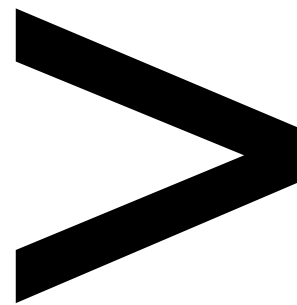


NOW



Mary Meeker: 74% of all internet traffic in 2017 will be video

Mobile Tipping Point for YouTube



Emerging trends

THEN



NOW



"When I'm available"

Evolution of video consumption

Live (Linear)

Traditional TV
1926

Tune-In or
Miss Out

Mass Concurrent
Audience

Real-Time Buzz



On-Demand

DVR / Streaming
1999

Watch on
Own Terms

Mass Disparate
Audience

Anytime Buzz



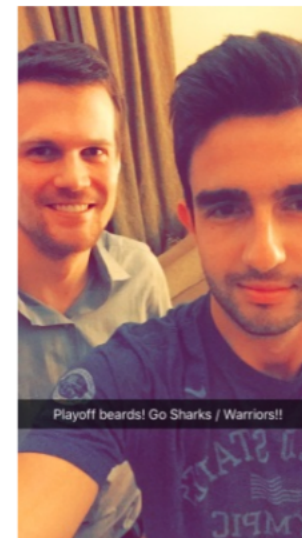
Semi-Live

Snapchat Stories
2013

Tune-In Within 24
Hours or Miss Out

Mostly Personal
Audience

Anytime Buzz



Real-Live

Periscope + Facebook Live
2015 / 2016

Tune-In / Watch
on Own Terms

Mass Audience,
yet Personal

Real Time + Anytime Buzz



Source: KPCB, Internet Trends, 2016

Age-related factors

Attributes – Millennials vs. Gen Z

Millennials

Tech Savvy: 2 screens at once

Communicate with text

Curators and Sharers

vs

Gen Z

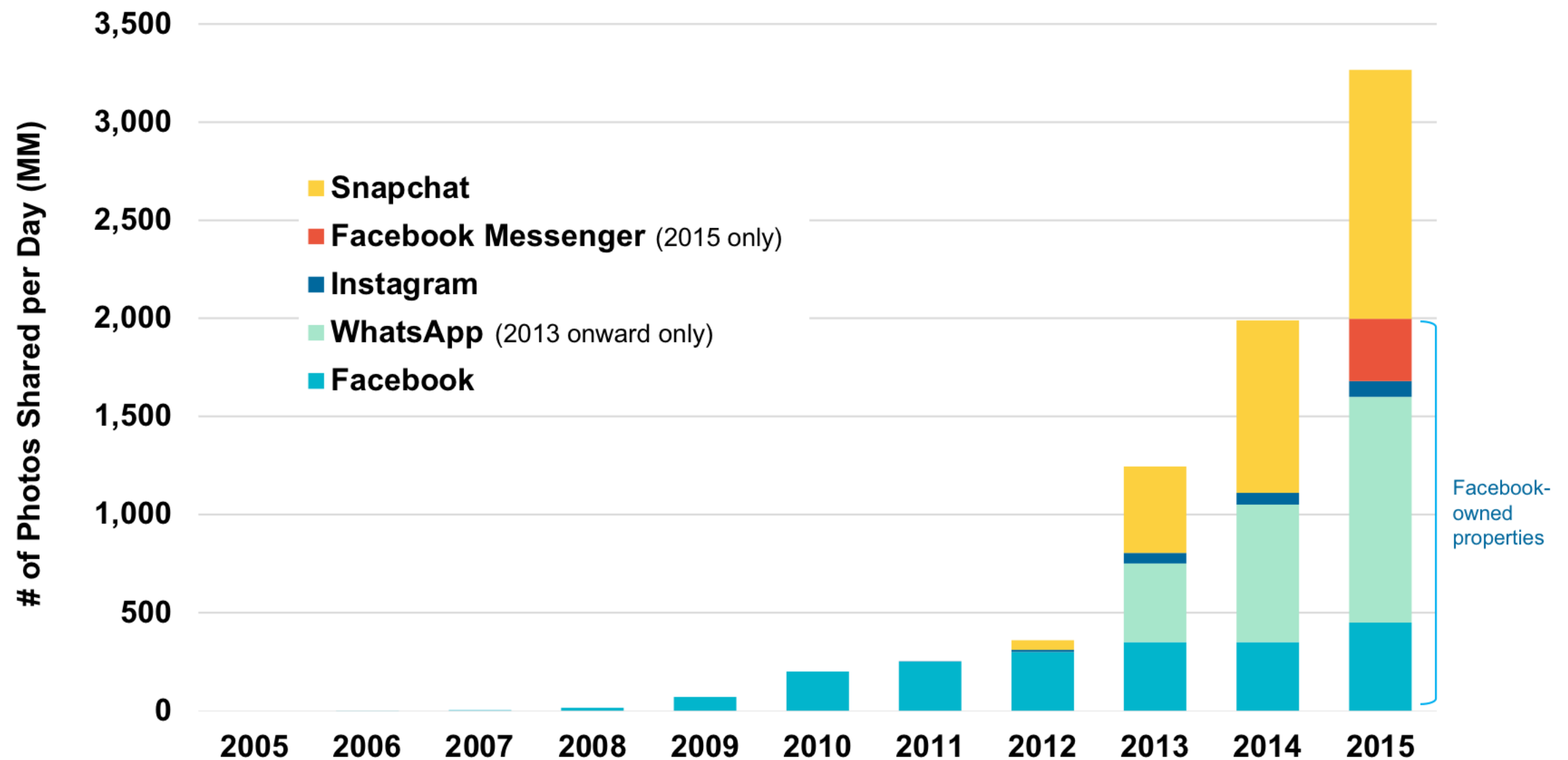
Tech Innate: 5 screens at once

Communicate with images

Creators and Collaborators

Growth in sharing

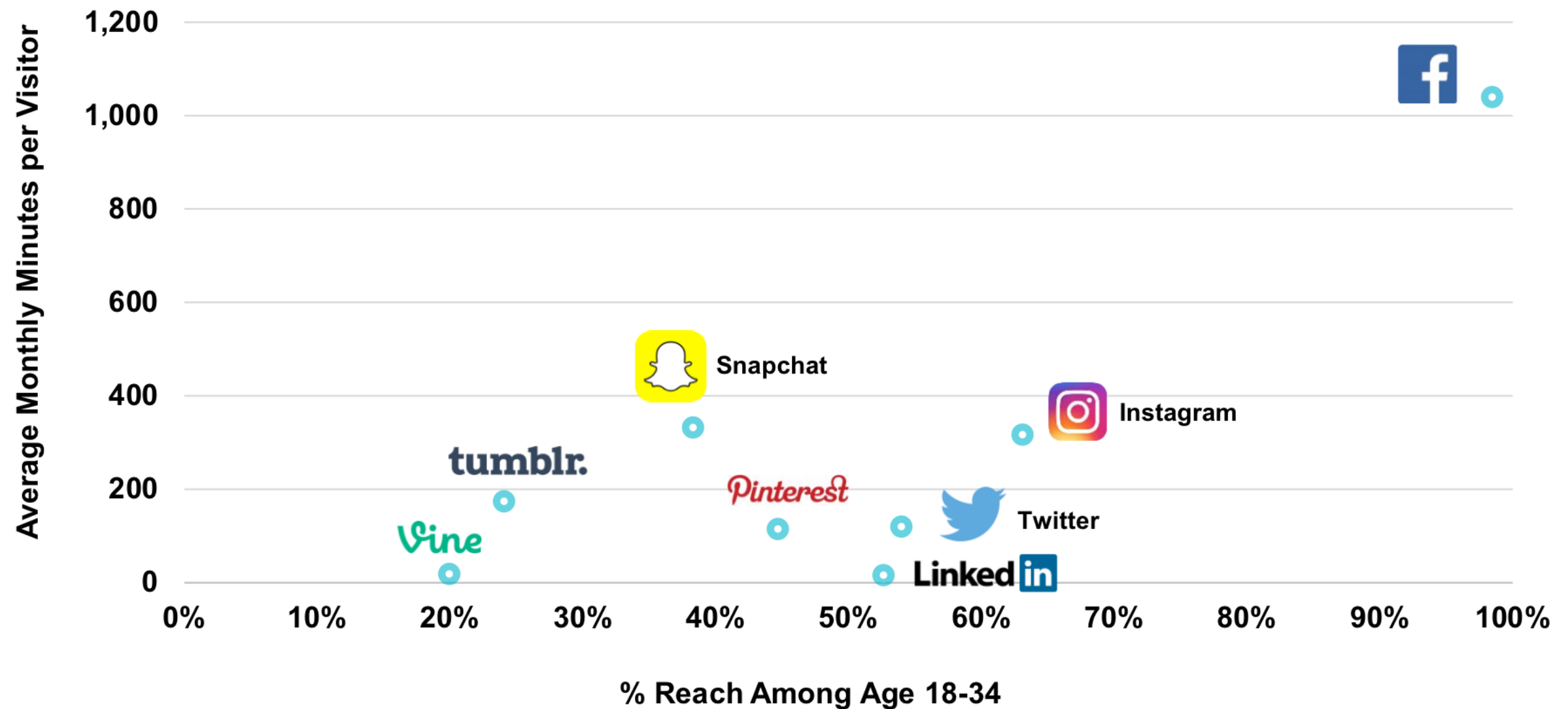
Daily Number of Photos Shared on Select Platforms, Global, 2005 – 2015



Source: KPCB, Internet Trends, 2016

Attention economy

**Age 18-34 Digital Audience Penetration vs.
Engagement of Leading Social Networks, USA, 12/15**



Source: KPCB, Internet Trends, 2016

Don't forget TV...

Ways in Which US Internet Users Discover TV/Video Content, Oct 2016

% of respondents

TV ads

56%

Word-of-mouth

54%

Internet search

32%

Digital video service recommendations

23%

Social media

21%

Radio, TV or podcast host recommendations

16%

Note: n=1,000

Source: Consumer Technology Association (CTA), "The Changing Landscape for Video and Content" as cited by MarketingCharts, March 20, 2017

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www.eMarketer.com

Evolution of the visual web

Great evening at
Jamie's Italian!



On Demand
subscription

VR

AR

360

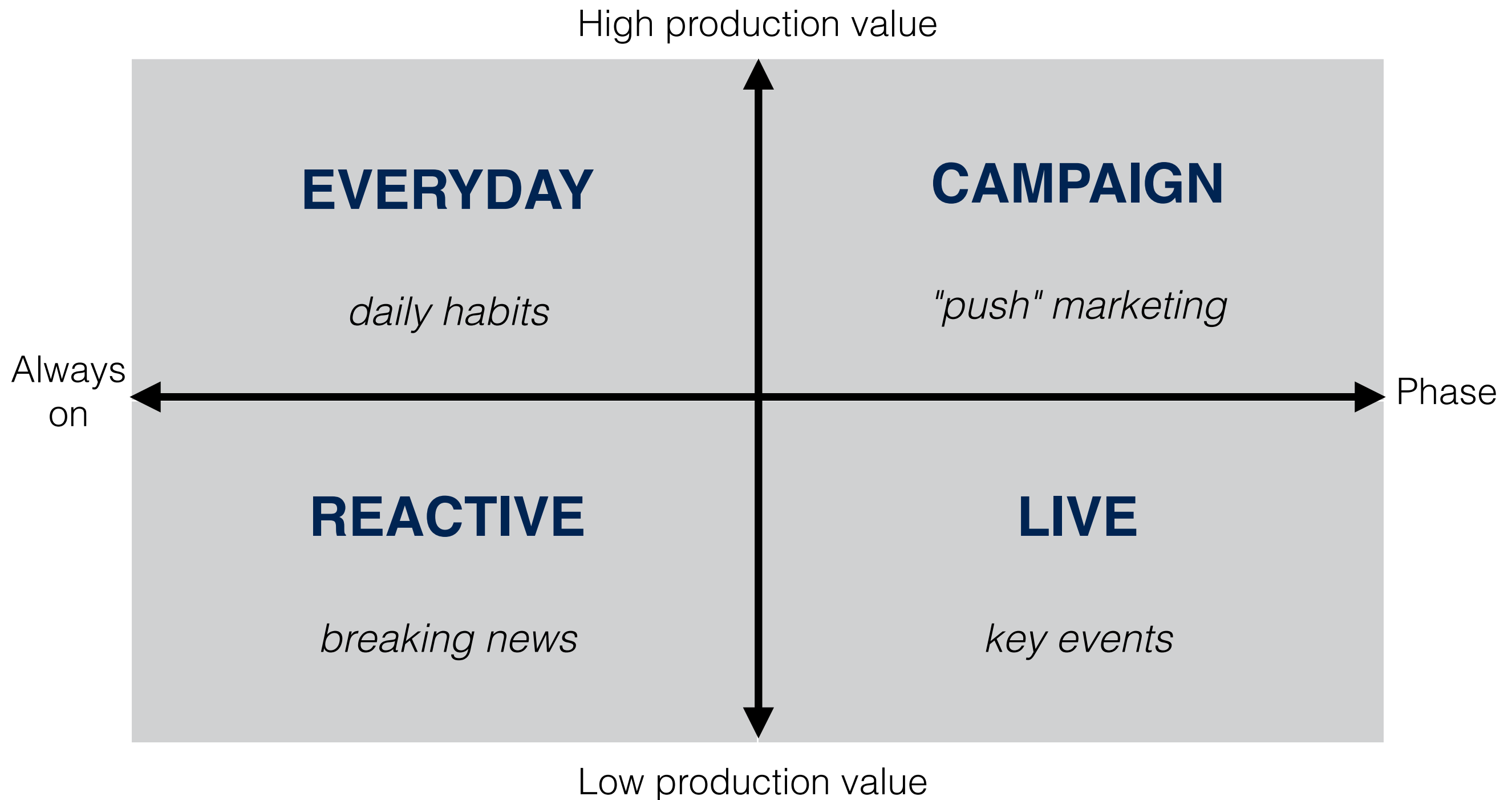
Micro / Macro
distribution

LIVE

Visual Strategies



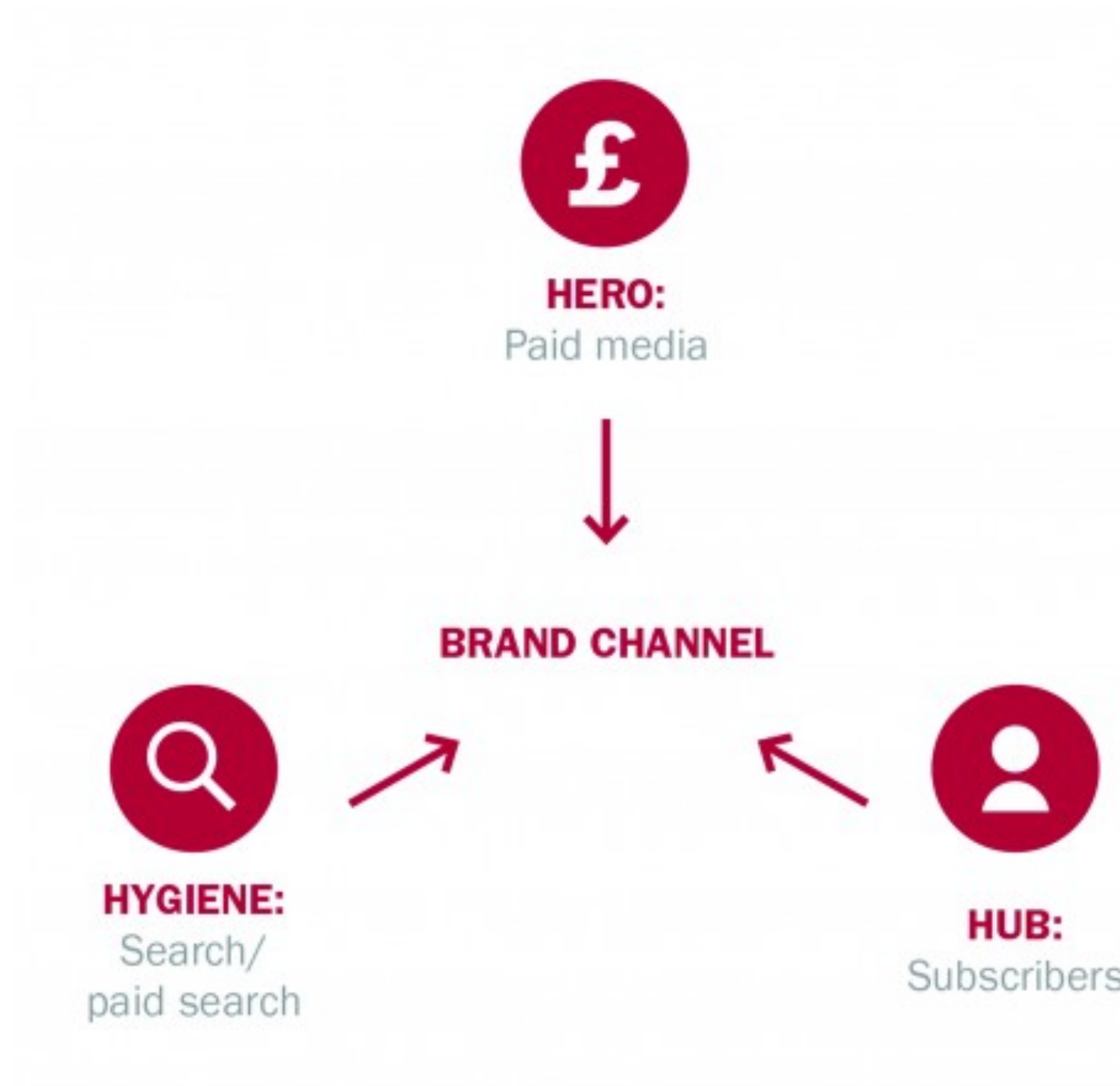
Visual Strategies - Create



Visual Strategies - Create

Investment costs

Content : Distribution
75 : 25



- 1) 81% of people mute video adverts**
- 2) 62% of people are annoyed by forced pre-rolls**
- 3) 23% of people have installed ad-blocking software**

Visual Strategies - Create

1) 81% of people mute video adverts



Subtitles

2) 62% of people are annoyed by forced pre-rolls



Skippable Ads

3) 23% of people have installed ad-blocking software

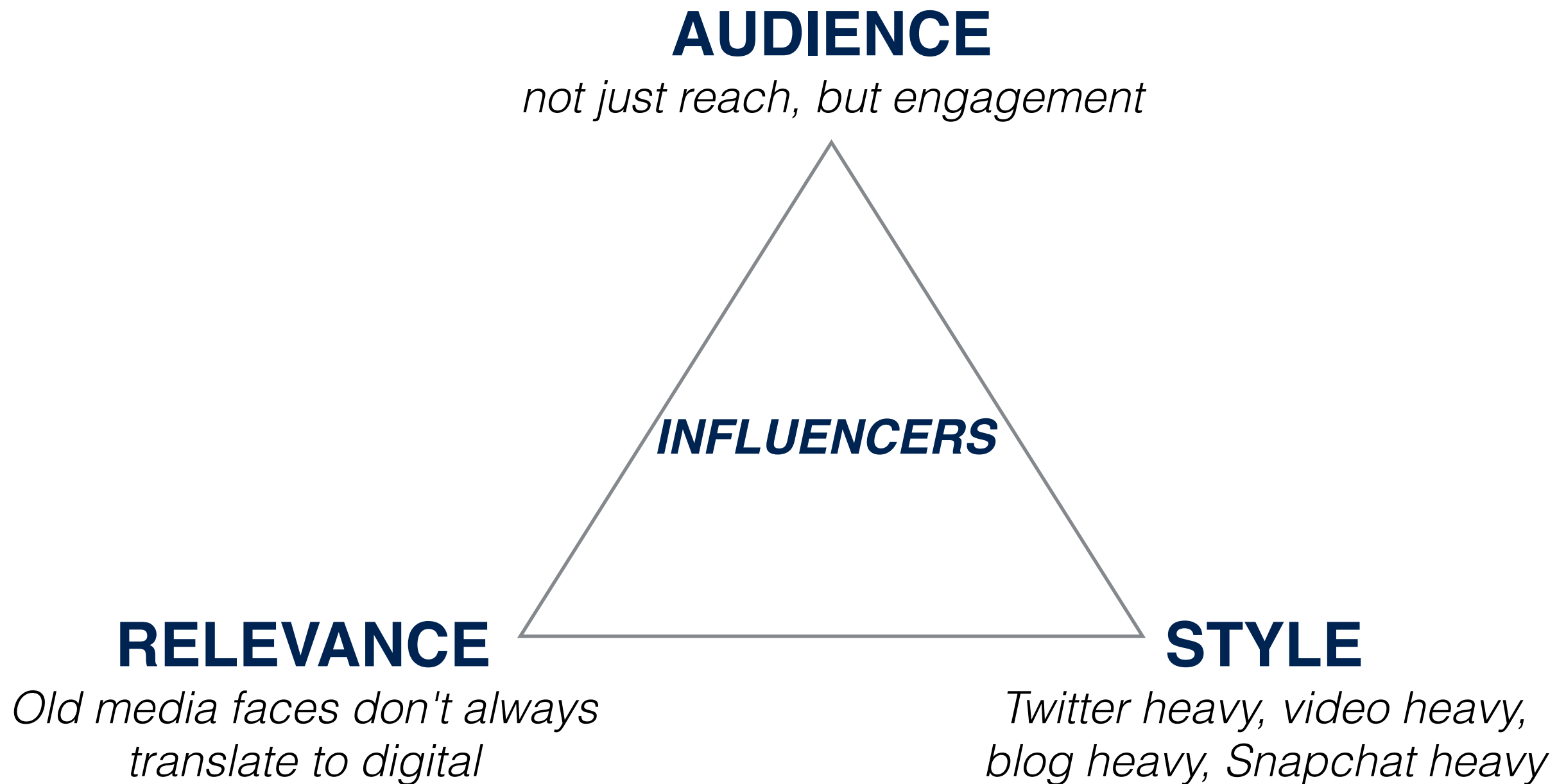


Better
Ads

Visual Strategies



Visual Strategies - Collaborate



Visual Strategies



Visual Strategies - Curate

PERSONAL CURATION - playlists, UGC

PAID - advert, placement

HUMAN CURATOR - influencer, DJ, editor

RECOMMENDATION - AI, ML, Spotify, Netflix

RECOMMENDATION - tracking social norms, Amazon, reviews

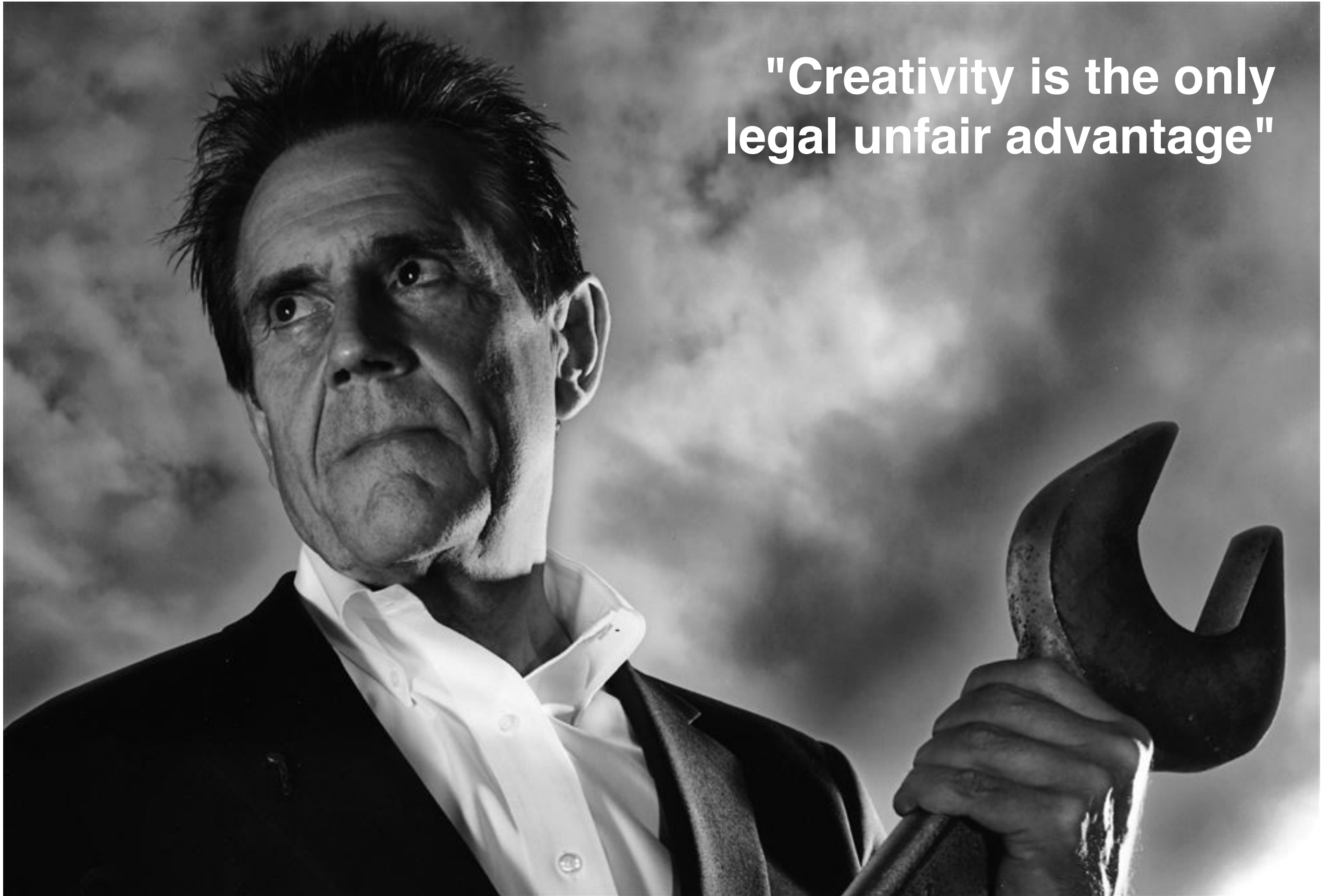
SOCIAL SHARING - word of mouth, likes, shares

DISCOVERY - search, SEO

Visual Strategies



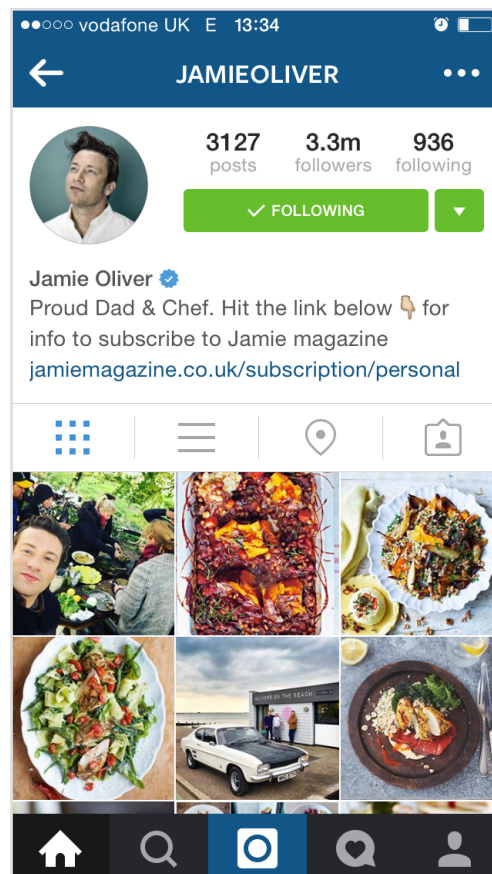
**"Creativity is the only
legal unfair advantage"**



Visual Strategies - Direct to Consumers



YouTube:	2.9m
Facebook:	6.4m
Twitter:	6.4m
Instagram:	5.6m



Source date: March 2017

Find a narrative

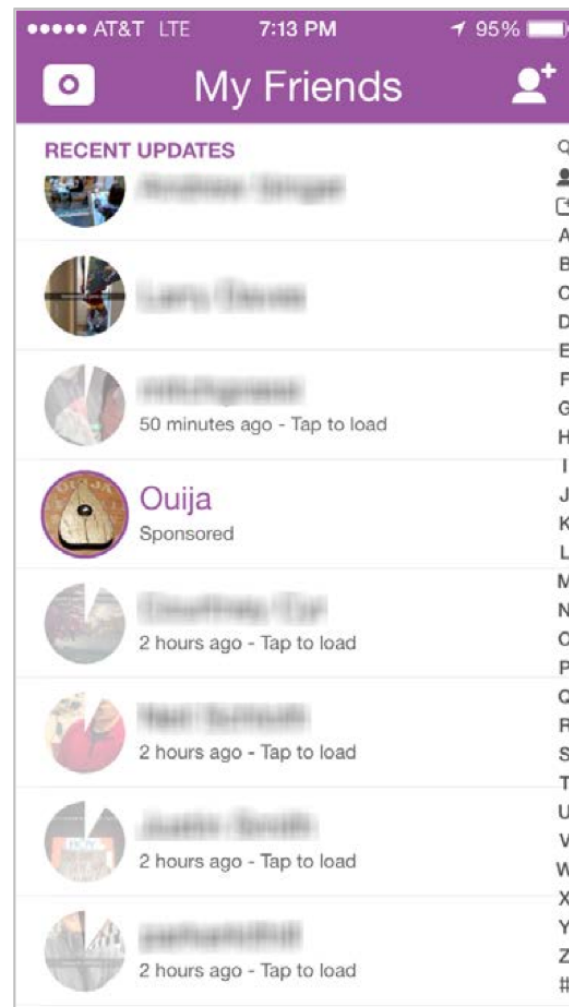
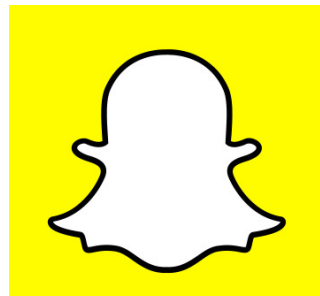
Be upfront

Find strong characters

Video isn't cheap

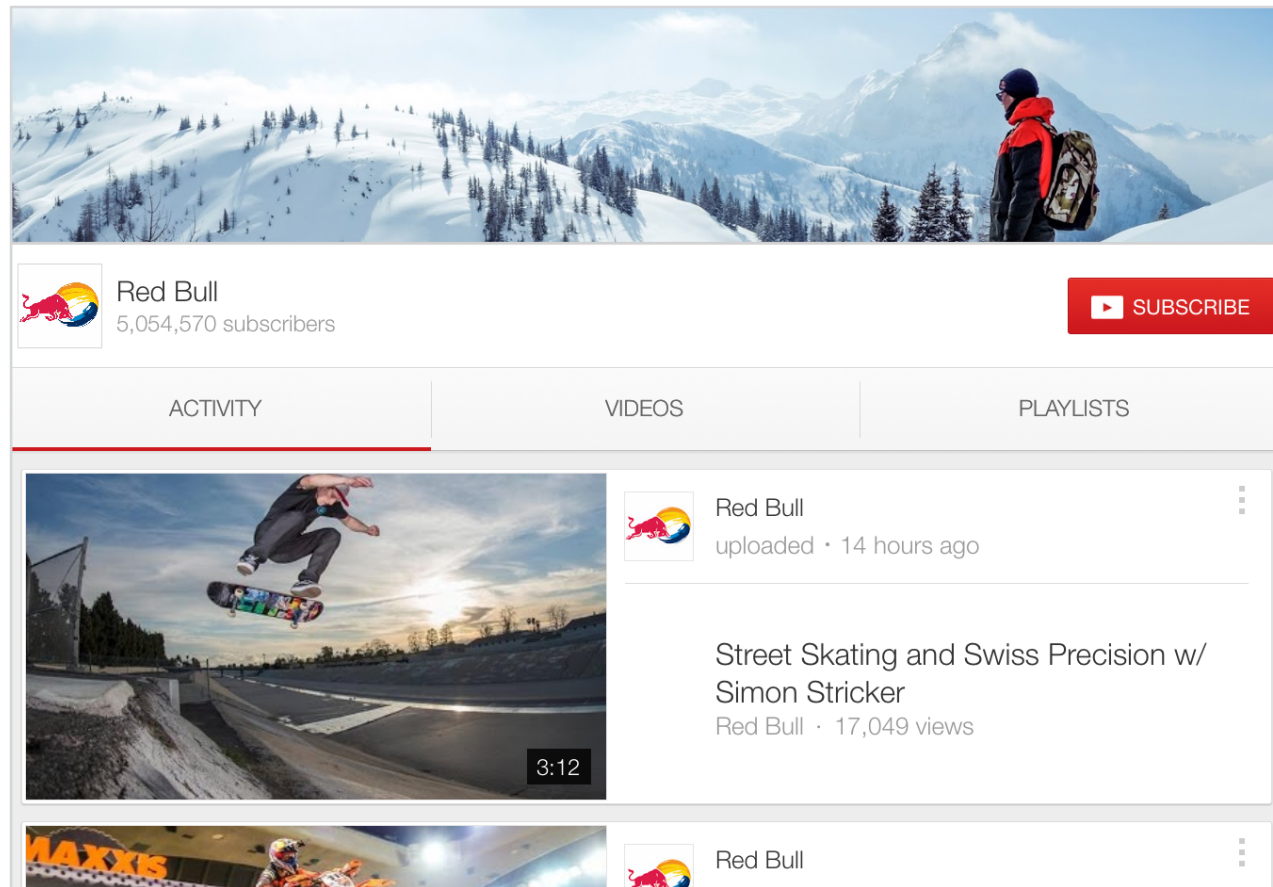
Source: Interview with Richard Herd, BrandRepublic October 2015

Visual Strategies - Think Vertical



Snapchat: Vertical (for mobiles)
Video (for storytelling)
Viewing (always full screen)

Visual Strategies - be authentic

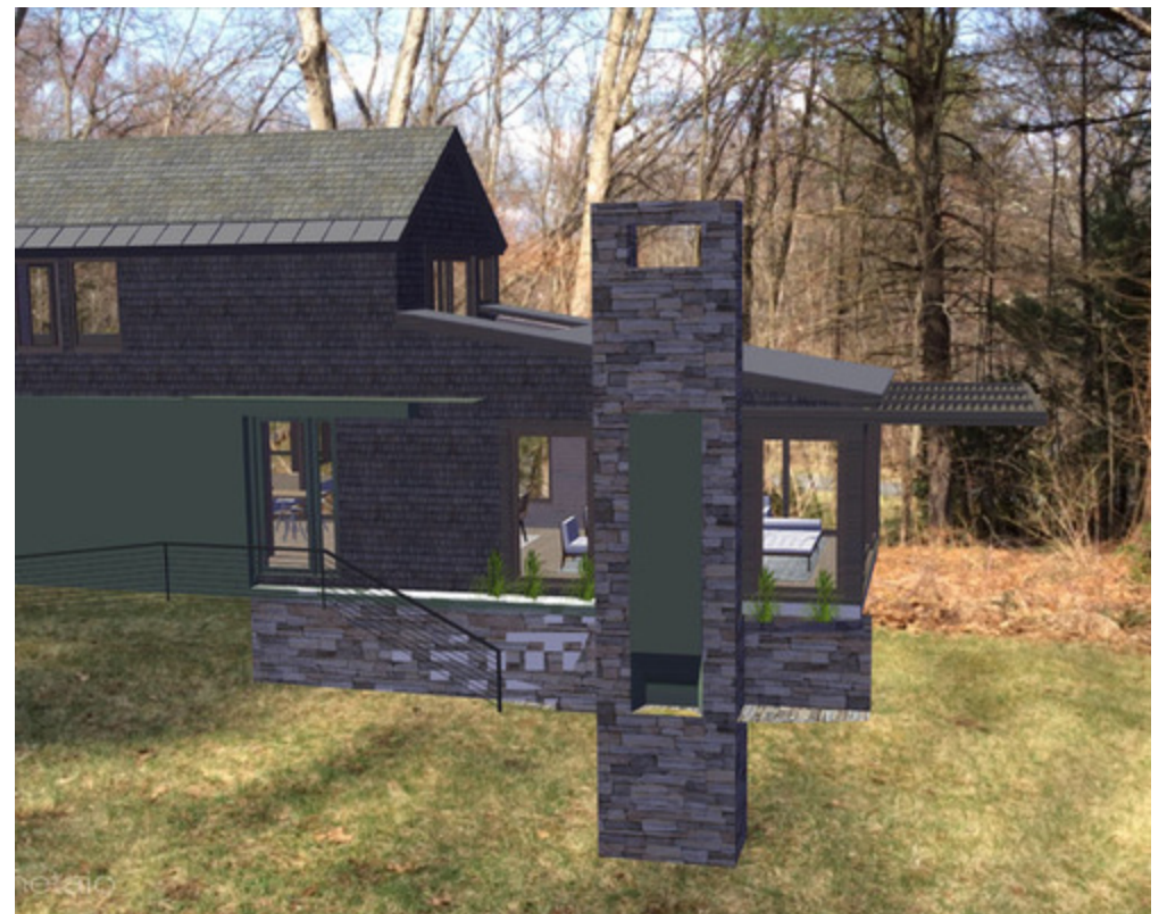


5.9m subscribers



? subscribers

Visual Strategies - Augmented Reality



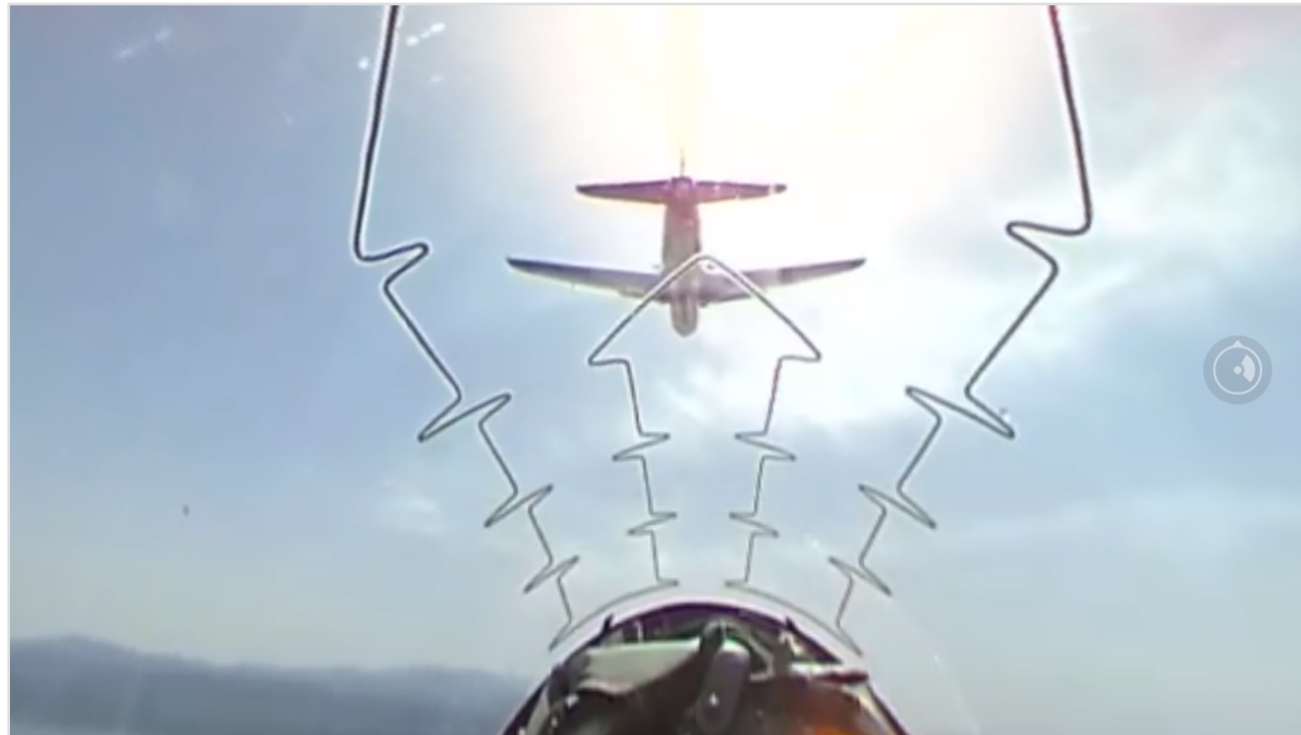
Visual Strategies - Augmented Reality



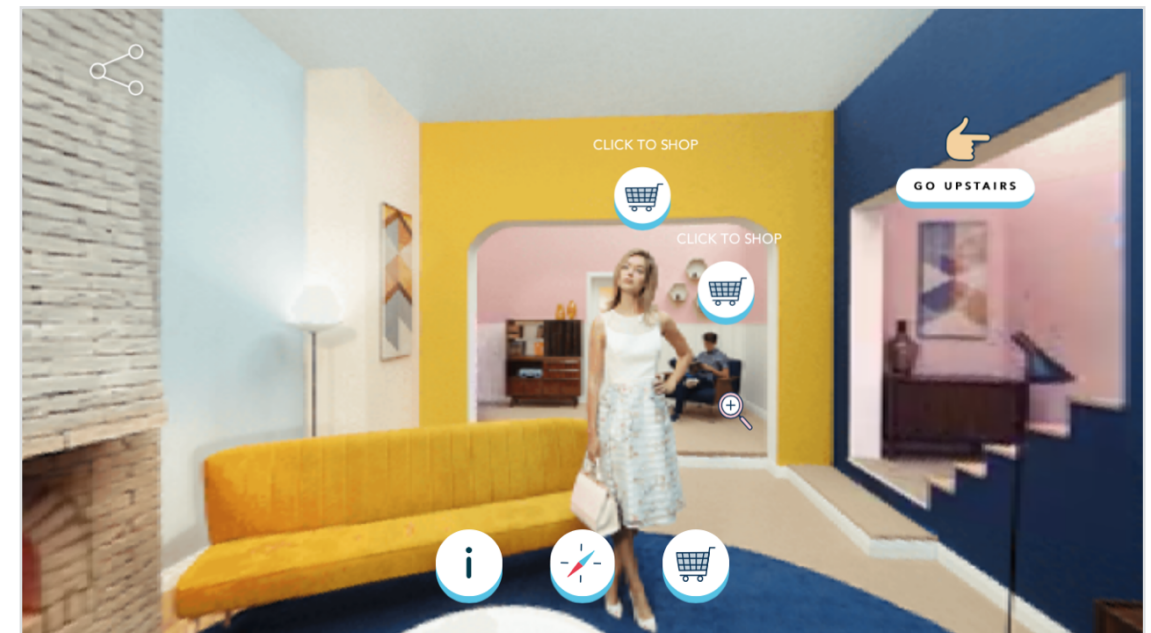
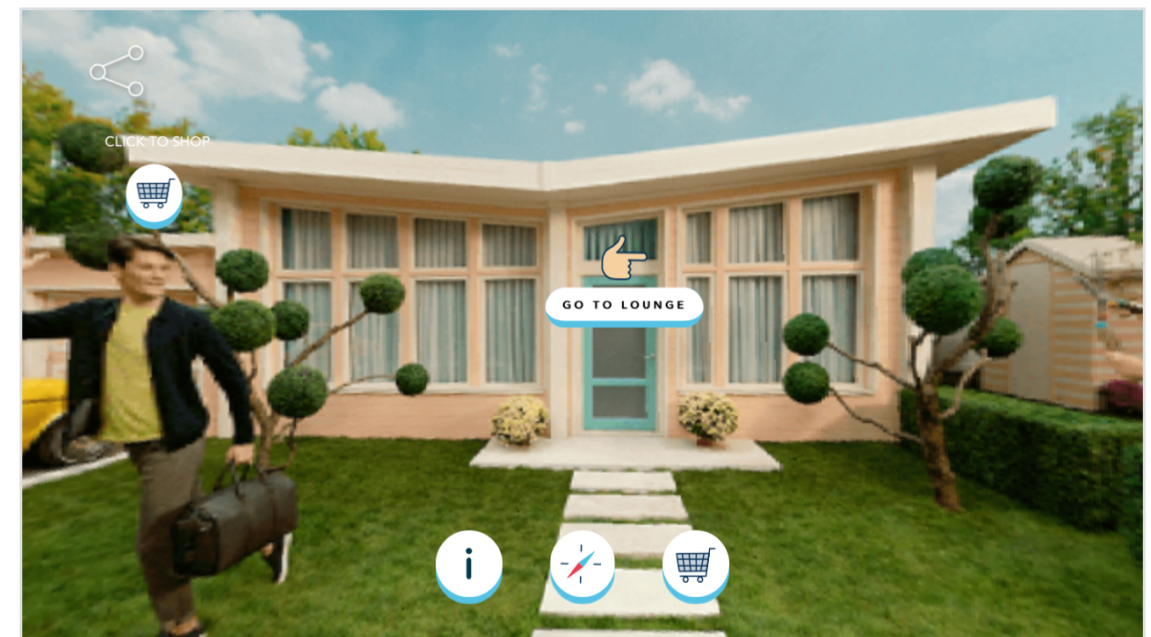
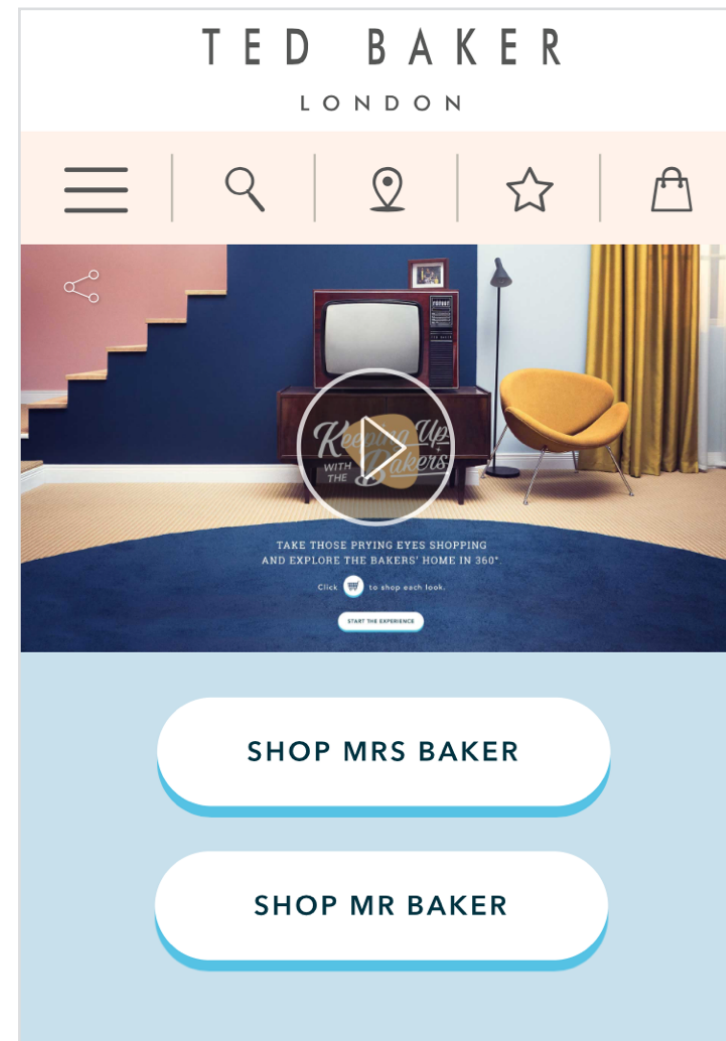
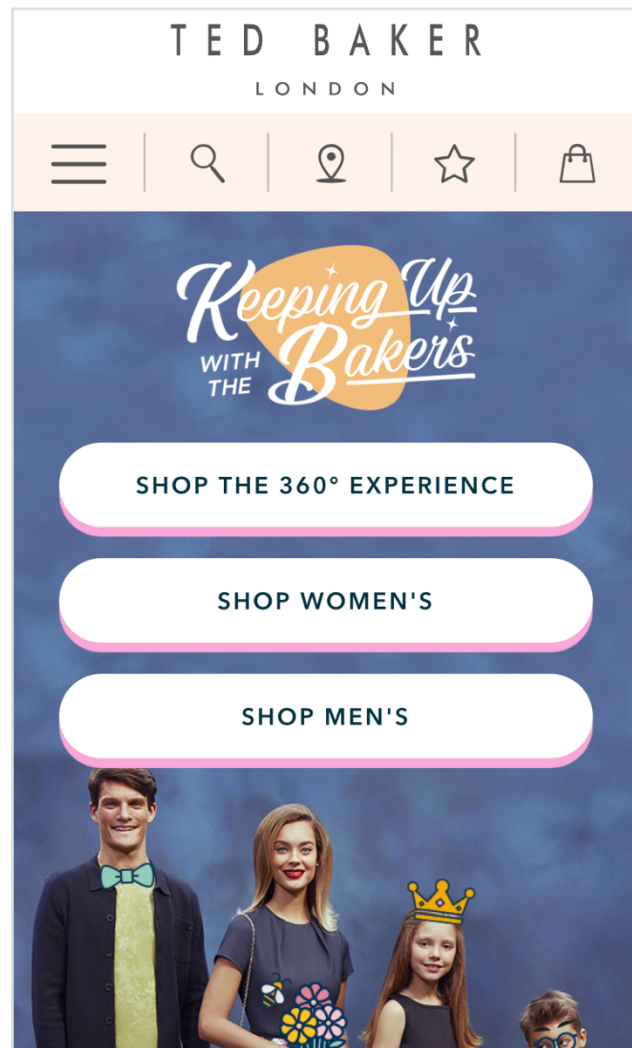
Visual Strategies - Augmented Reality



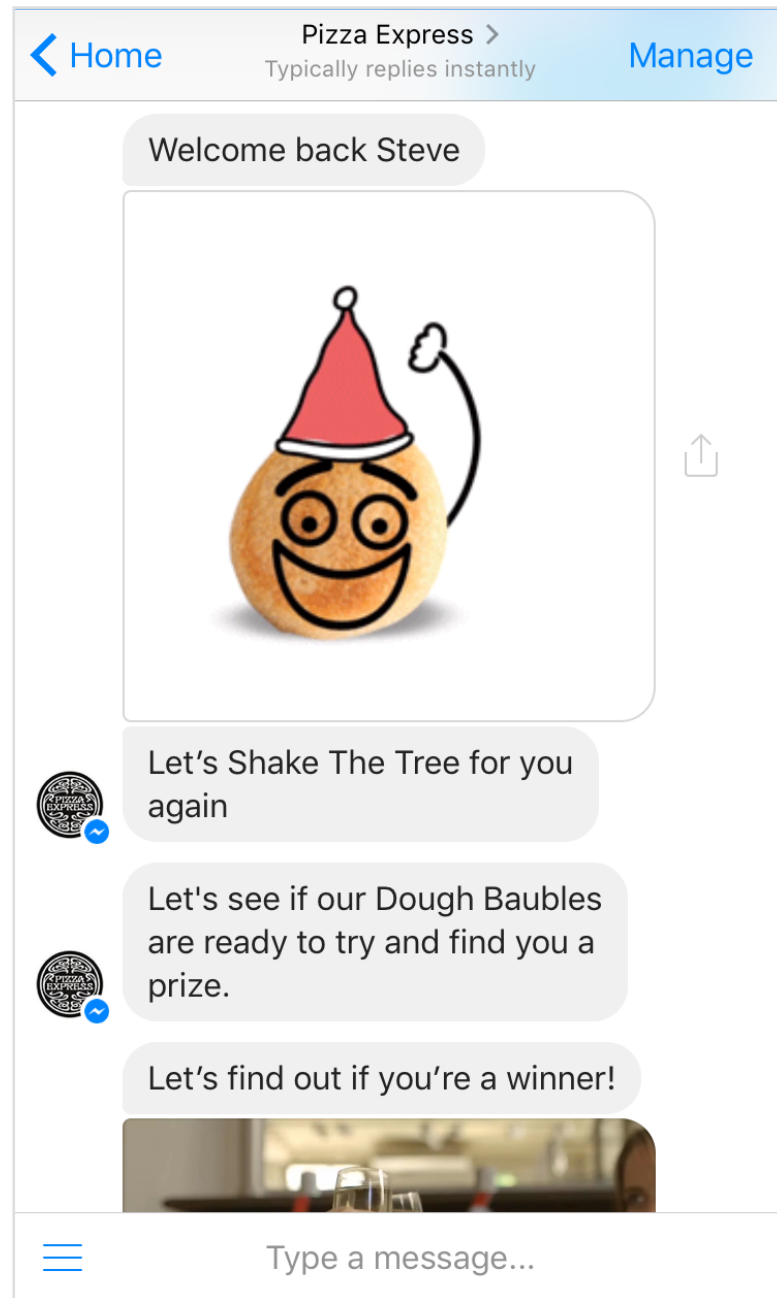
Visual Strategies - 360 video experiential



Visual Strategies - 360 video - e-commerce



Visual Strategies - Personalisation



Visual Strategies - Virtual Reality



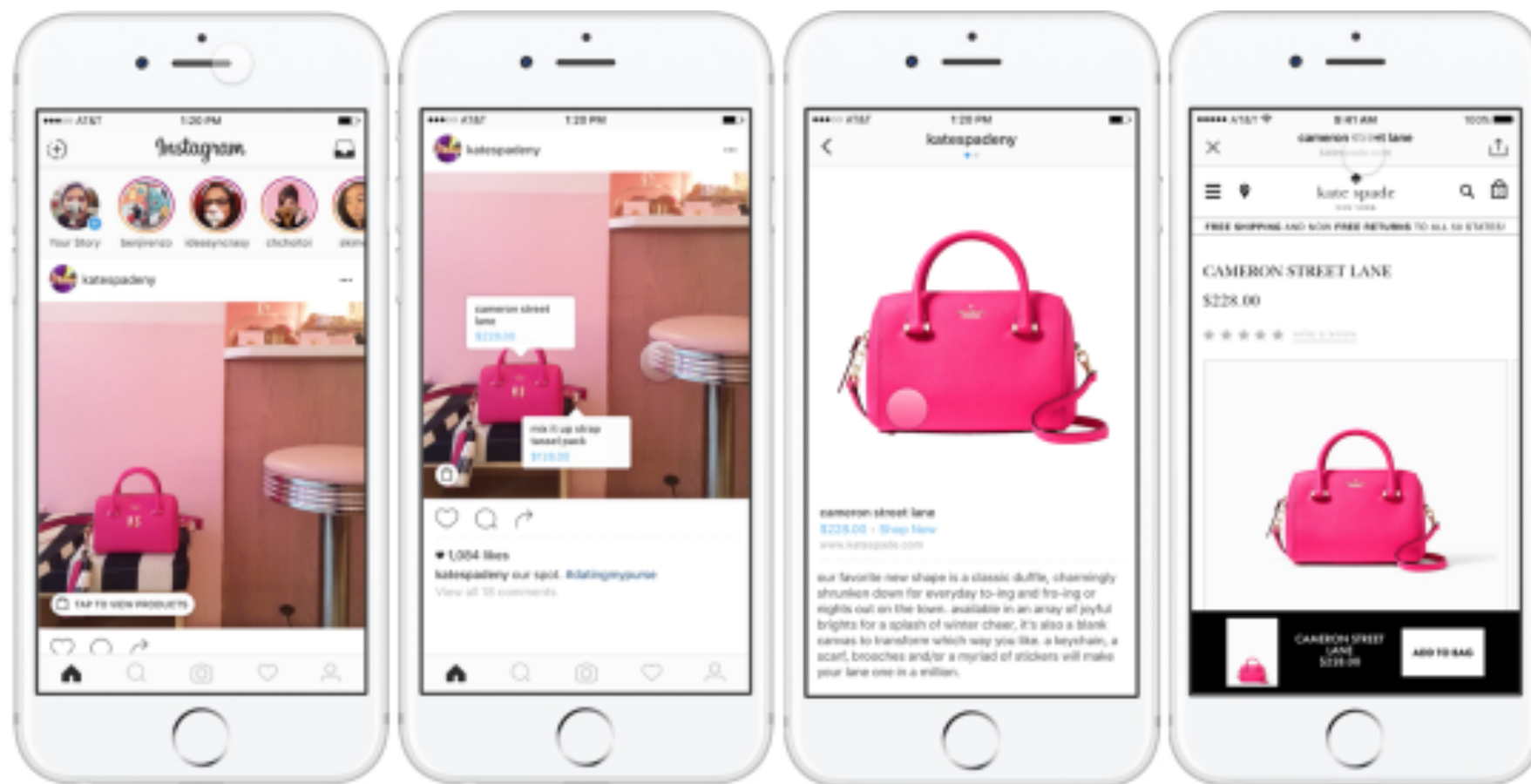
Showrooming

1500 dealerships
85 markets

Visual Strategies - instream e-commerce tagging



Instagram



Visual Strategies - Make it fun!

Candace Payne in Chewbacca Mask on Facebook Live

Most Viewed Live Video @ 153MM+ Views, 5/16
Kohl's = Mentioned 2 Times in Video
Kohl's = Became Leading App in USA iOS App Store
Chewbacca Mask Demand Rose Dramatically



Candace Payne was live.
It's the simple joys in life...

Shared with: Public
152,750,864 Views



Candace Payne was live.
It's the simple joys in life...

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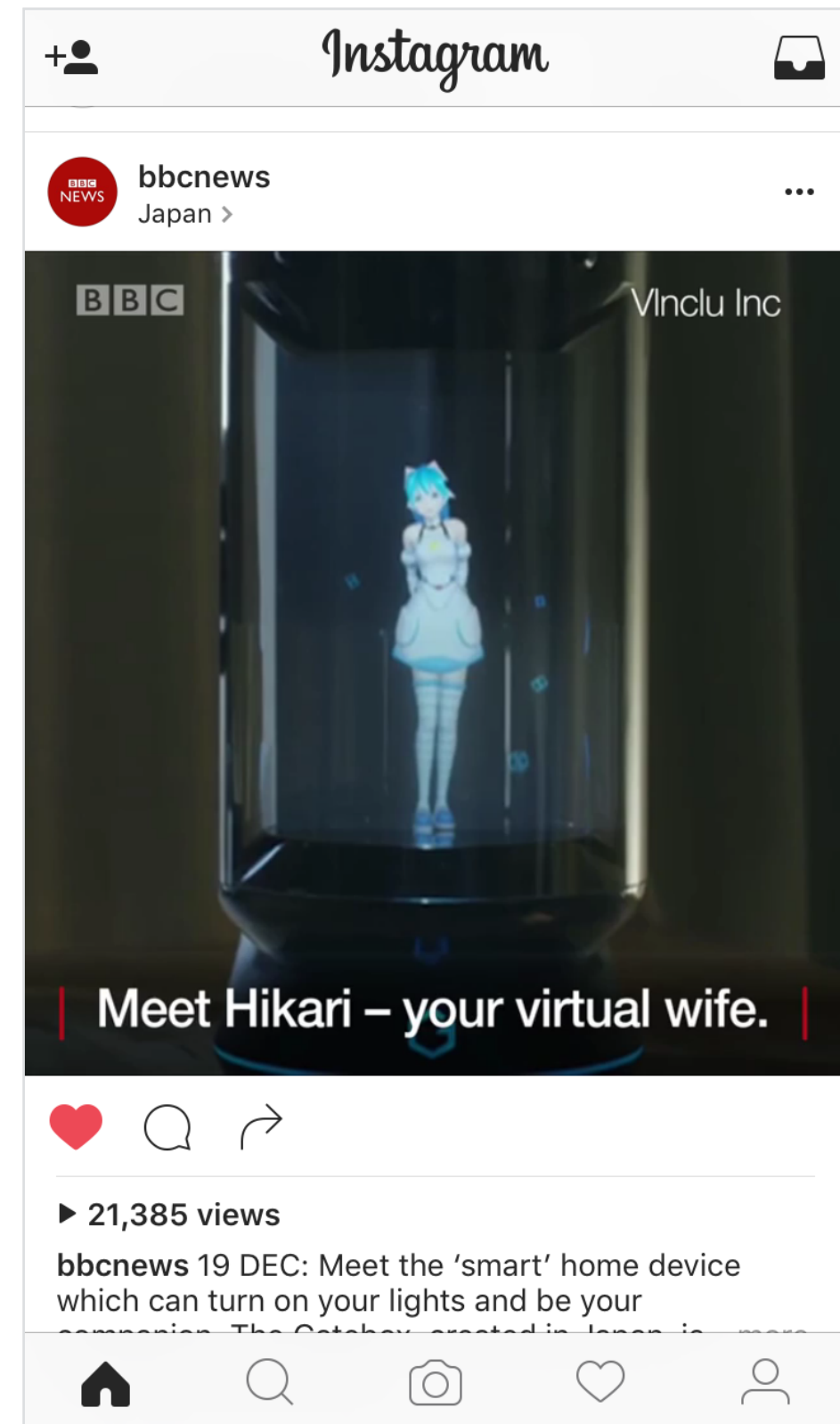
yo Lens
pchat

Gatorade Super Bowl Lens
165MM Views on Snapchat
2/7/16

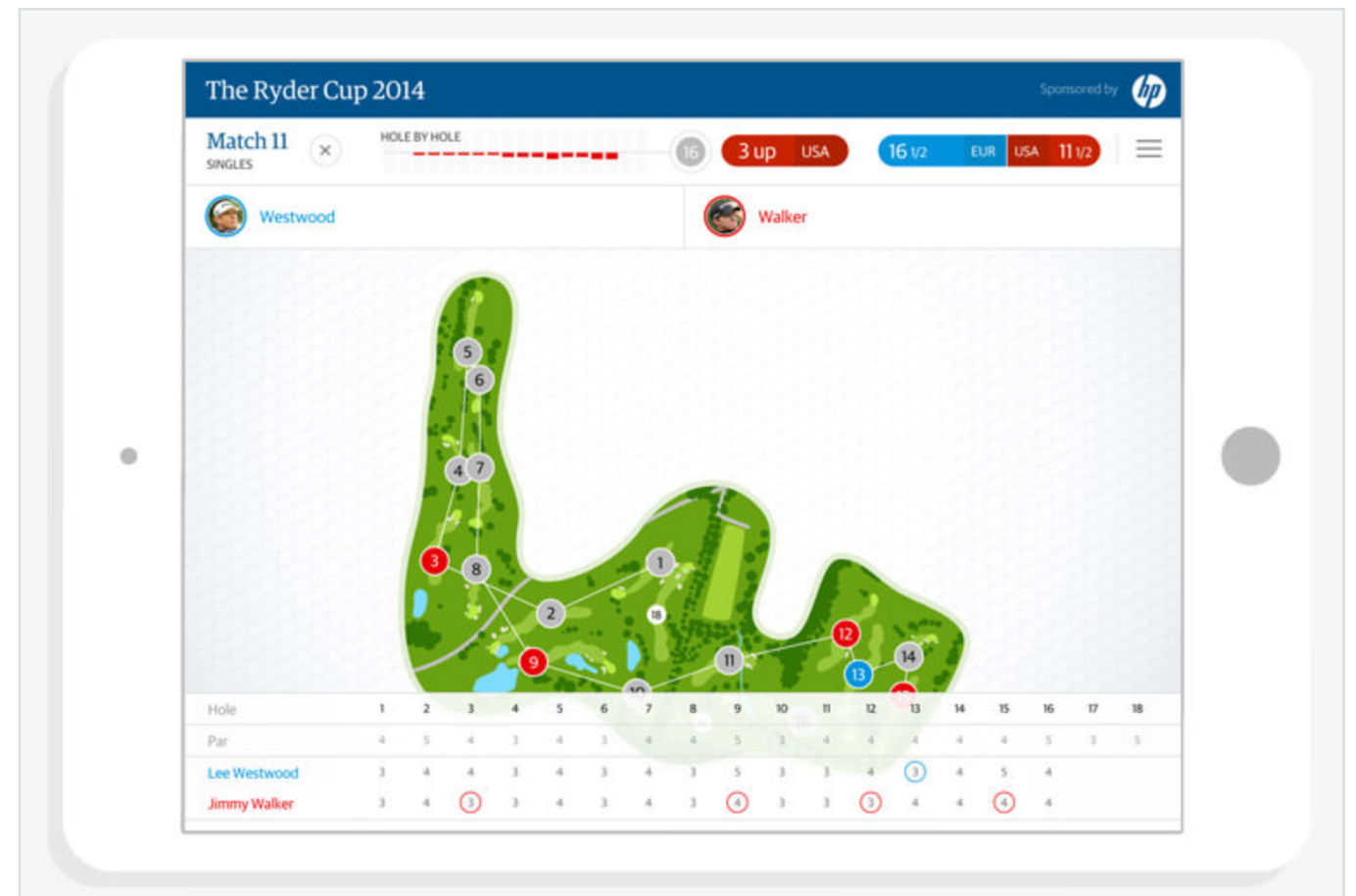
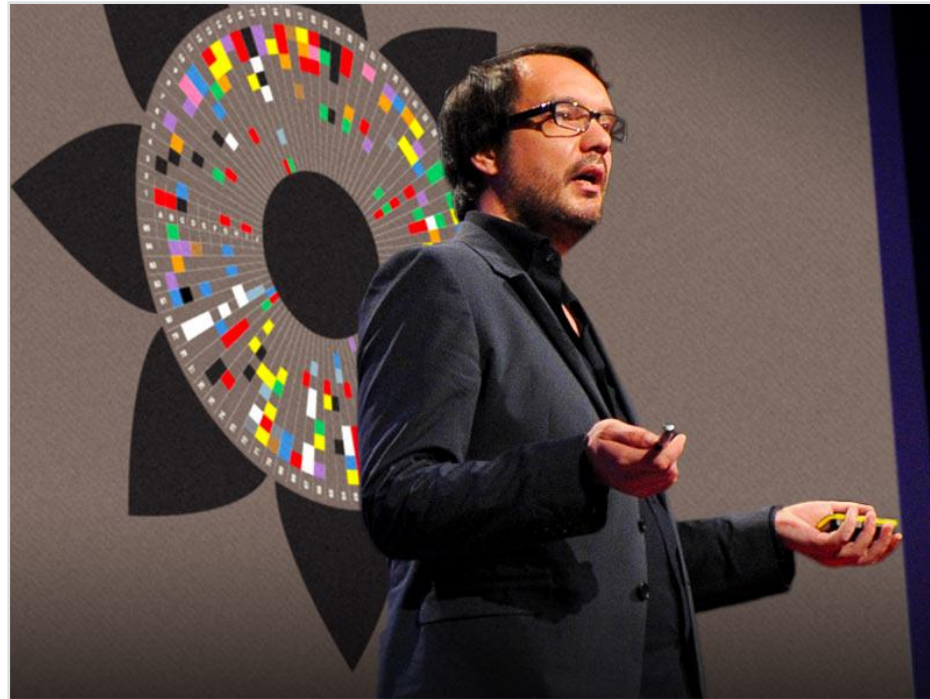
Iron Man Filter from MSQRD
8MM+ Views on Facebook
3/9/16

Average Snapchatter Plays With Sponsored Lens for
20 Seconds

Visual Strategies - Timely and reactive



Visual Strategies - Infographics to Real-time Visualisation



Visual Strategies - LIVE video



Visual Strategies - Viral?

- **Prominent branding puts off viewers (Utilise brand pulsing)**
- **People get bored right away (Create joy or surprise right away)**
- **People watch for a while and then stop (Build an emotional rollercoaster)**
- **People like ads but won't share (Surprise but don't shock)**
- **People still won't share the ad (Target the viewers who will)**

Source: Thales Teixeira, Harvard Business School, 2012

Visual Strategies - Some advice

1) **Be Agile**

Test and learn

Get familiar, fail fast and cheaply

Visual Strategies - Some advice

1) **Be Agile**

Test and learn

Get familiar, fail fast and cheaply

2) **Get Attention (not clicks!)**

Plan for distribution

Visual Strategies - Some advice

1) **Be Agile**

Test and learn

Get familiar, fail fast and cheaply

2) **Get Attention (not clicks!)**

Plan for distribution

3) **Be Authentic**

Consumers have a strong BS radar

Remember the human creative element

Tell great stories

Further reading



DIGIDAY



"Make interesting friends and learn from them"

Anna Wintour, Editor-in-Chief, Vogue

"The electric light did not come from the continuous improvement of candles"

Oren Harari