

"PRESENTE Y FUTURO DE LA INDUSTRIA PUBLICITARIA DIGITAL"

AGENDA

9.30

Palabras de apertura y agradecimiento a la UP y a los sponsors.

9.35

"El Estado de la industria publicitaria digital y los desafíos para estos tiempos" - Gustavo Buchbinder, Presidente del IAB

10.00

"Datos relevantes de la Industria" - Ignacio Dufour de Comscore

10.30

Panel "El valor de Content Marketing" - integrado por: Romina Stekar de Infobae; Pablo Rodríguez, de Unilever; Georgina Geirola de Pluto TV, Gabriel Pato, de La Caja Cia. De Seguros. Modera: Federico Ehrenfeld de FE

11.00

Panel "La data y la tecnología para entender los hábitos de consumo de medios" - integrado por: Priscila Pipman de Grupo Atlántida; Fernando Mariasch de La Nación, Mariela Gentile, de Clarín e Isabel Penelas de Kantar IBOPE Media. Modera: Claudia Molinari de ARTEAR.

Clarín

artear

CADENA 3
ARGENTINA

Google



ims
by Aleph

infobae

iPROSPECT

KANTAR IBOPE MEDIA

LA NACION

Meta



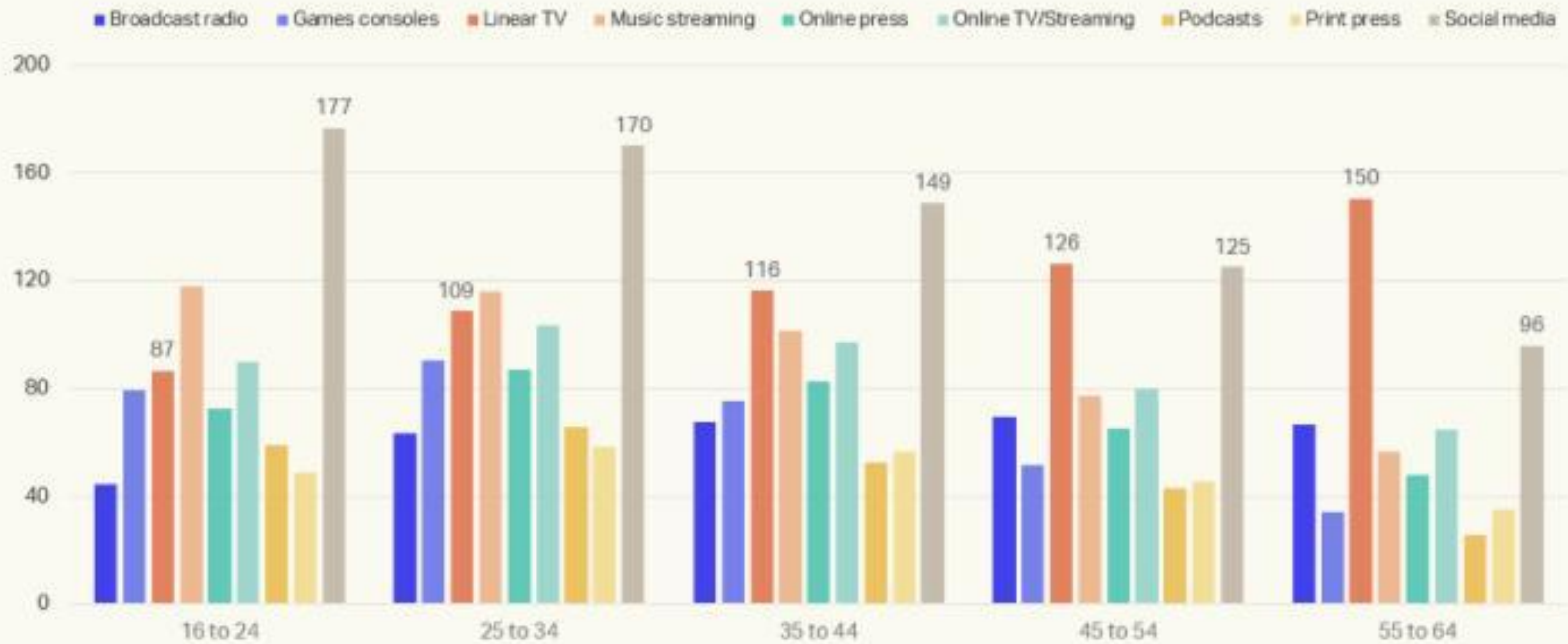
El Estado de la industria publicitaria digital y los desafíos para estos tiempos.

Digital en el Mundo

Global, Media consumption, 2023(f)








WARC Media

Minutes, daily average



SOURCE: WARC Media








Internet Users Worldwide, by Region

Timeframe ▼	2022	2023	2024	2025	2026	
Millions						
– Asia-Pacific	2,570.0	2,634.0	2,691.2	2,737.7	2,774.7	
– Central & Eastern Europe	315.3	320.4	324.1	327.2	329.5	
– Latin America	451.2	456.4	461.1	465.4	469.8	
– Middle East & Africa	516.5	535.2	549.2	566.6	583.1	
– North America	335.3	338.7	342.4	346.0	349.6	
– Western Europe	363.0	367.1	370.4	373.5	375.8	
– Worldwide	4,551.4	4,651.9	4,738.4	4,816.4	4,882.5	



Internet User Penetration Worldwide, by Region








% of population

Timeframe ▼	2022	2023	2024	2025	2026	
Asia-Pacific	59.8%	60.9%	61.8%	62.5%	63.0%	
Central & Eastern Europe	73.9%	75.2%	76.1%	76.9%	77.6%	
Latin America	67.9%	68.1%	68.3%	68.4%	68.6%	
Middle East & Africa	29.8%	30.2%	30.3%	30.6%	30.9%	
North America	89.2%	89.5%	89.8%	90.1%	90.4%	
Western Europe	84.9%	85.7%	86.2%	86.7%	87.1%	
Worldwide	57.4%	58.1%	58.7%	59.1%	59.4%	

Source: eMarketer, February 2022

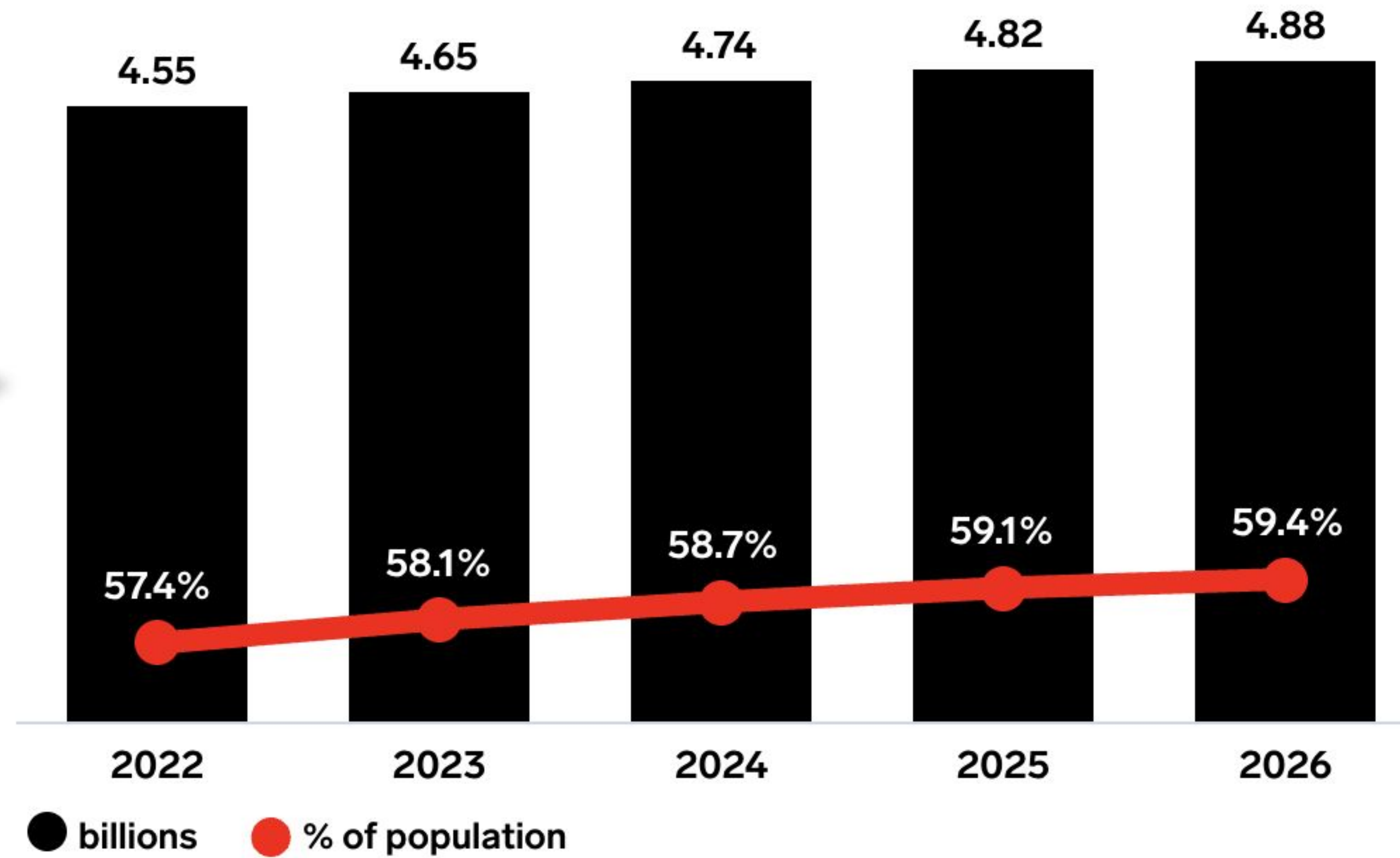
Mobile Phone Users Penetration Worldwide, by Region

% of population

Timeframe ▼	2022	2023	2024	2025	2026	
Asia-Pacific	71.0%	71.5%	72.0%	72.5%	72.8%	
Central & Eastern Europe	74.8%	75.2%	75.4%	75.6%	76.3%	
Latin America	69.5%	69.7%	69.9%	70.1%	70.4%	
Middle East & Africa	36.3%	36.4%	36.6%	36.8%	37.0%	
North America	84.6%	84.9%	85.1%	85.3%	85.5%	
Western Europe	83.3%	83.6%	83.9%	84.2%	84.5%	
Worldwide	64.8%	65.1%	65.3%	65.5%	65.7%	




Internet Users

Worldwide, 2022-2026



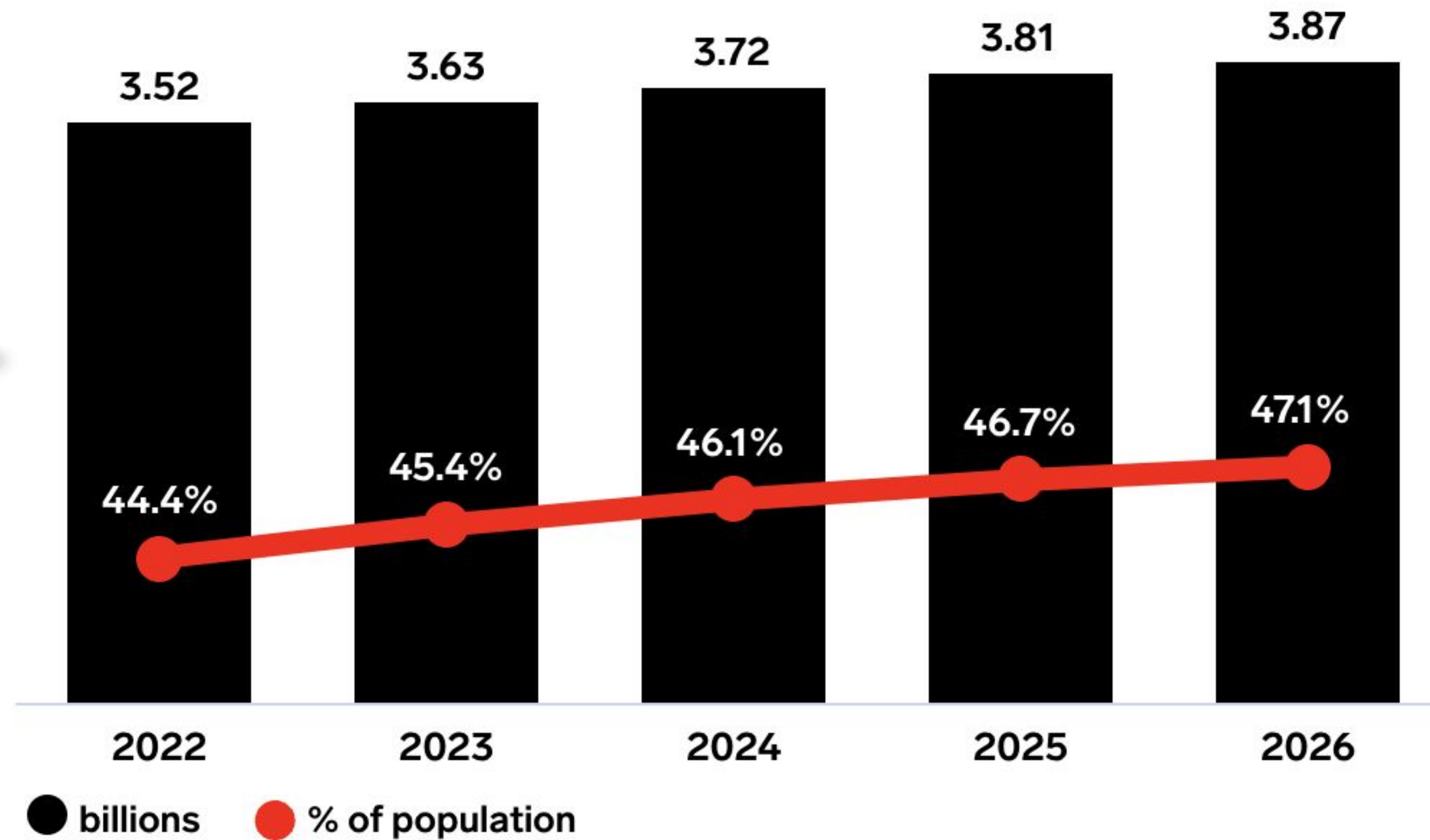
Source: eMarketer, February 2022 (see below for notes and methodologies).

Internet Users and Penetration in Worldwide

Timeframe ▼	2022	2023	2024	2025	2026	
Internet users (billions)	4.55	4.65	4.74	4.82	4.88	
– % change	2.6%	2.2%	1.9%	1.6%	1.4%	
– % of population	57.4%	58.1%	58.7%	59.1%	59.4%	

Digital Video Viewers

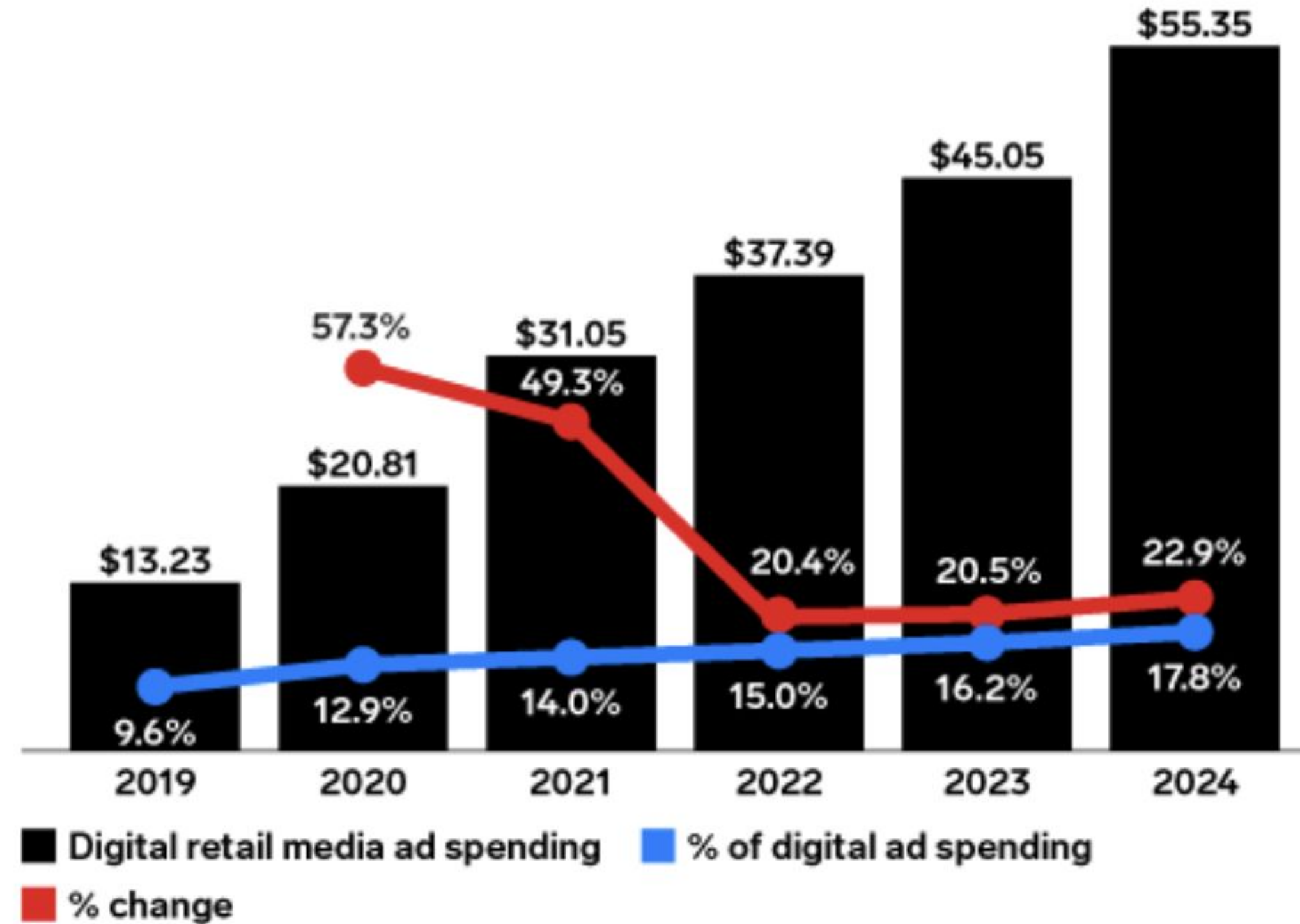
Worldwide, 2022-2026



Source: eMarketer, October 2022 (see below for notes and methodologies).

US Digital Retail Media Ad Spending, 2019-2024

billions, % change, and % of digital ad spending



Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include advertising on Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps

Source: eMarketer, Oct 2022

US Total Media Ad Spending and Growth, by Format/Media, 2022-2023

billions, % change and % of total

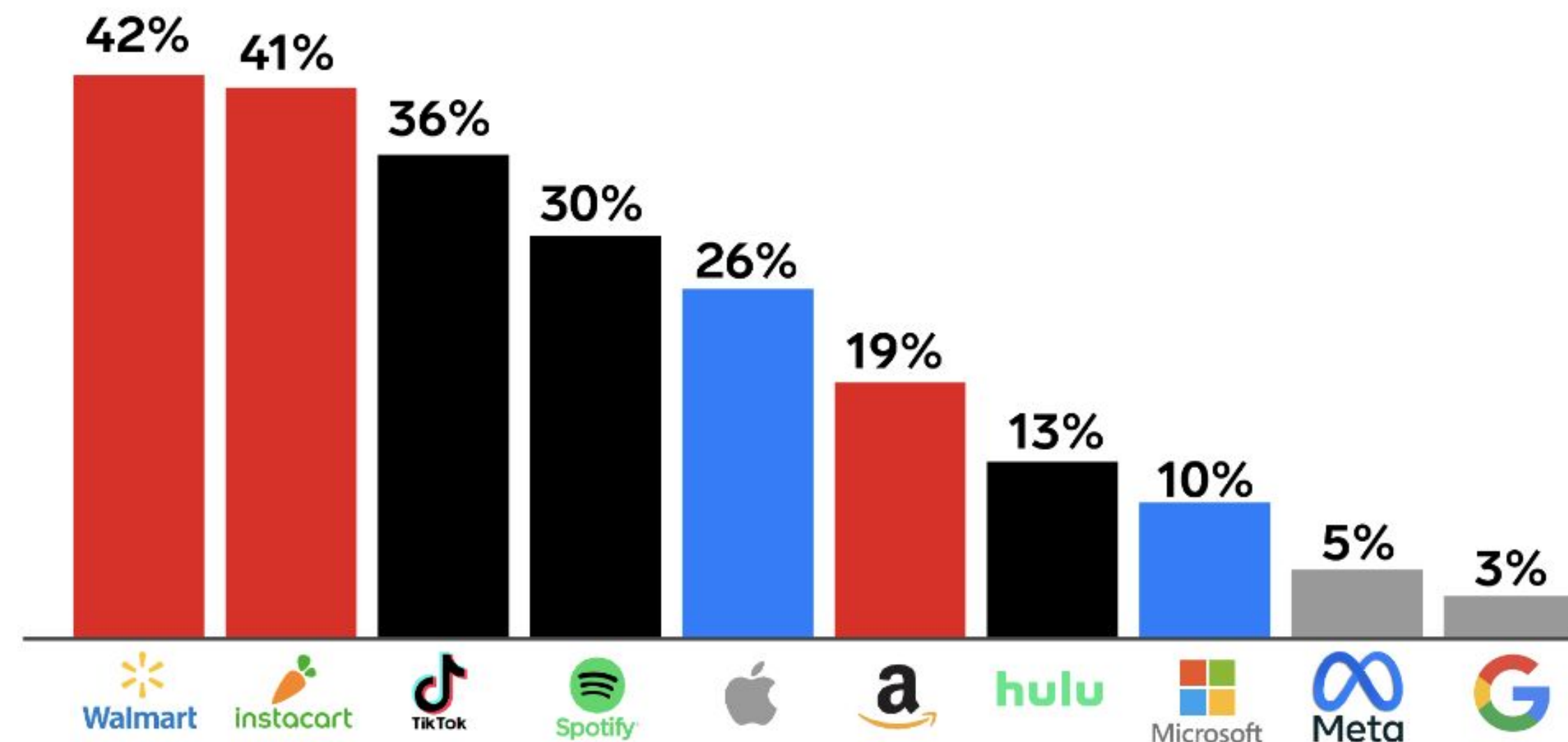
	2022		2023		Previous growth
	Spending	% change	% share	% change	
Cinema	\$0.3	103.0%	0.1%	49.9%	34.9%
Out-of-home	\$9.1	19.0%	2.9%	6.7%	7.7%
Search	\$114.6	15.4%	36.1%	11.3%	12.6%
Direct mail	\$18.9	9.9%	5.9%	-7.1%	-6.8%
Audio	\$16.8	5.9%	5.3%	0.5%	0.8%
Video	\$87.9	7.1%	27.7%	-4.4%	-3.1%
—Short-form video	\$18.3	11.9%	5.8%	10.4%	13.2%
—Long-form video	\$69.6	5.9%	21.9%	-8.3%	-7.5%
—National AVOD, OTT/CTV	\$6.8	18.4%	2.2%	31.6%	32.7%
—National linear TV	\$38.7	-4.0%	12.2%	-6.3%	-5.8%
—Local TV	\$24.0	22.7%	7.6%	-22.9%	-22.1%
Social	\$61.8	1.2%	19.4%	4.8%	6.4%
Publishing	\$16.0	-4.2%	5.0%	-1.8%	-1.1%
Total (including cyclical events)	\$317.5	8.0%	100.0%	3.7%	4.8%
Total (excluding cyclical events)	\$310.2	6.2%	97.7%	5.8%	6.8%

Note: cyclical events include elections, Olympics, etc.

Source: Magna Global as cited in press release, Dec 4, 2022

US Digital Ad Revenue Growth, by Company, 2023

% change



■ Retail Media
 ■ Big Tech
 ■ Streaming
 ■ The Duopoly

Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites

Source: eMarketer, Nov 2022

US Connected TV (CTV), Retail Media, TV, Social Network, and Search Ad Spending, 2023

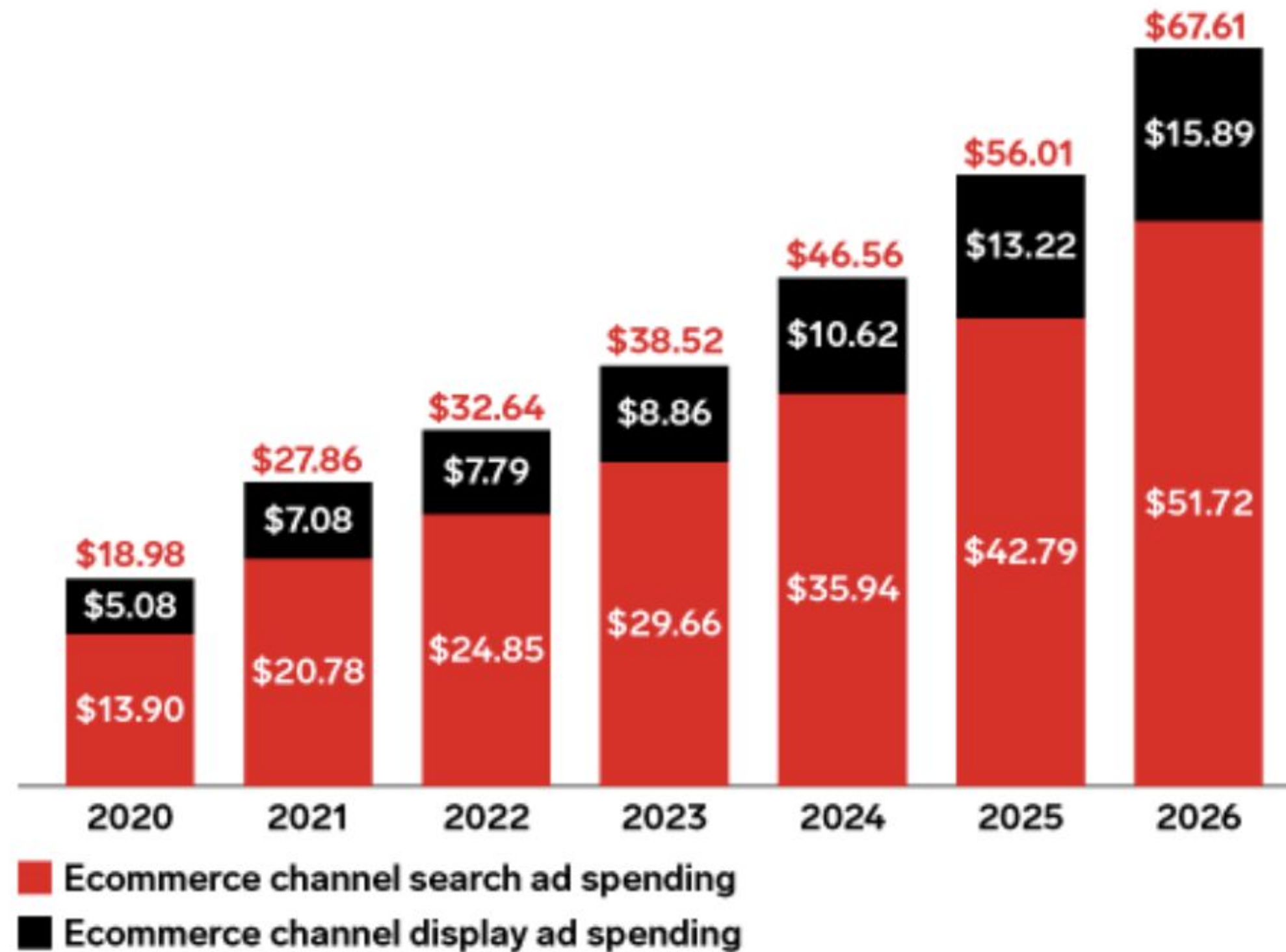
billions



Note: search ad spending includes contextual text links, paid inclusion, paid listings, and SEO; social network ad spending includes paid advertising appearing within social networks, social network games, and social network apps; TV ad spending includes broadcast TV (network, syndication, and spot) and cable TV; excludes digital; retail media ad spending includes digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); CTV ad spending includes digital advertising that appears on CTV devices
Source: eMarketer, Oct 2022

US Ecommerce Channel Ad Spending, by Format, 2020-2026

billions



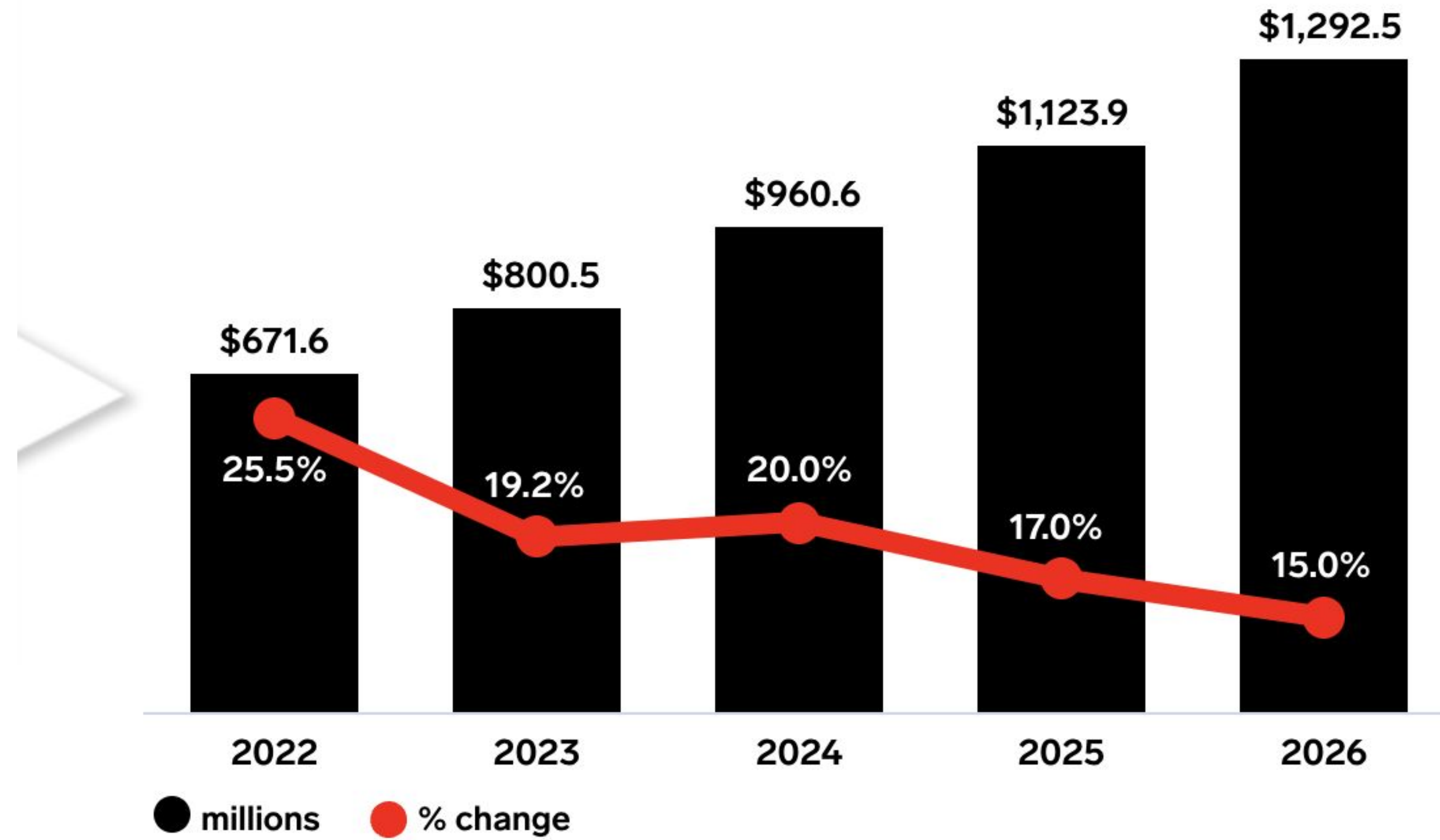
Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce; examples include advertising on Amazon, Walmart, and eBay; excludes advertising on social networks or search engines; includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms

Source: eMarketer, Oct 2022

Argentina y Latam







Digital Ad Spending Argentina, 2022-2026



Source: eMarketer, October 2022 (see below for notes and methodologies).

Digital Ad Spending in Argentina

Timeframe ▼	2022	2023	2024	2025	2026	
Digital ad spending (millions)	\$671.6	\$800.5	\$960.6	\$1,123.9	\$1,292.5	
– % change	25.5%	19.2%	20.0%	17.0%	15.0%	
– % of total media ad spending	47.6%	50.8%	54.1%	57.2%	60.0%	
– % of worldwide digital ad spending	0.1%	0.1%	0.1%	0.1%	0.2%	

Top 10 Countries, Ranked by Digital Ad Spending Growth, 2022

% change

1. Argentina	64.0%
2. Colombia	44.0%
3. Peru	36.0%
4. Chile	35.0%
5. Brazil	34.0%
6. Mexico	29.0%
7. India	24.2%
8. US	17.8%
9. France	17.5%
10. Germany	17.0%
Worldwide	15.6%

Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms

Source: eMarketer, March 2022

Latin America Ad Spending Snapshot, 2022

Digital Ad Spending

Ad dollars will shift to digital, away from traditional formats

Digital ad spending:



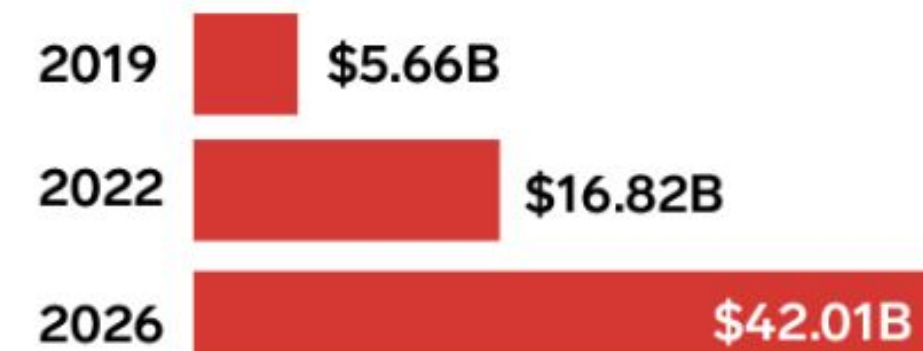
% of total media ad spending



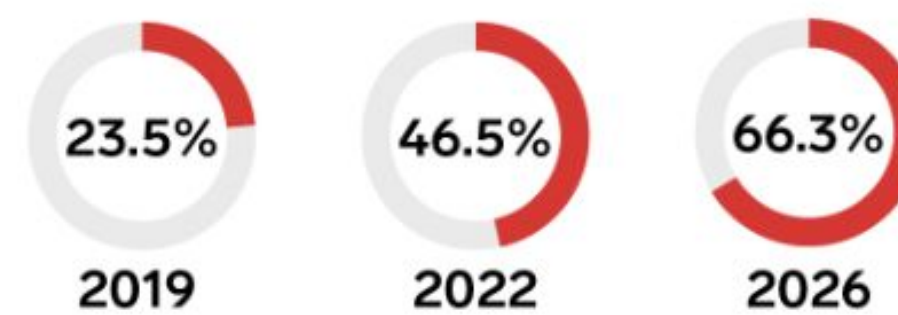
Mobile Ad Spending

Consumers will spend the majority of digital media time on mobile devices

Mobile ad spending:



% of total media ad spending



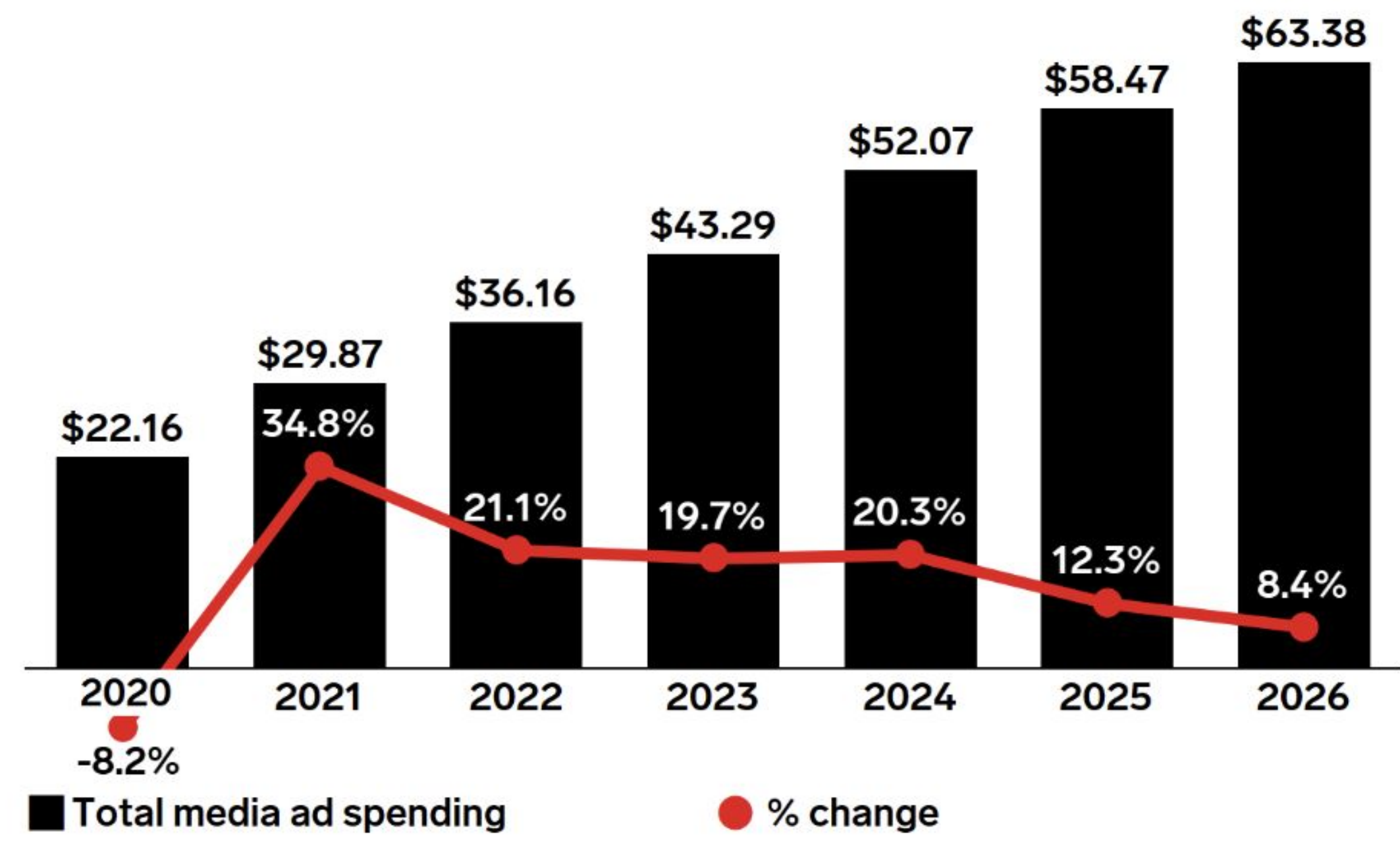
Total Media Ad Spending Growth (YoY), 2022



Source: eMarketer, March 2022
g274906

Total Media Ad Spending in Latin America, 2020-2026

billions and % change



Note: includes digital (desktop/laptop, mobile, and other internet-connected devices), directories, magazines, newspapers, out-of-home, radio, and TV
Source: eMarketer, March 2022

Top 10 Countries, Ranked by Total Media Ad Spending, 2022

billions

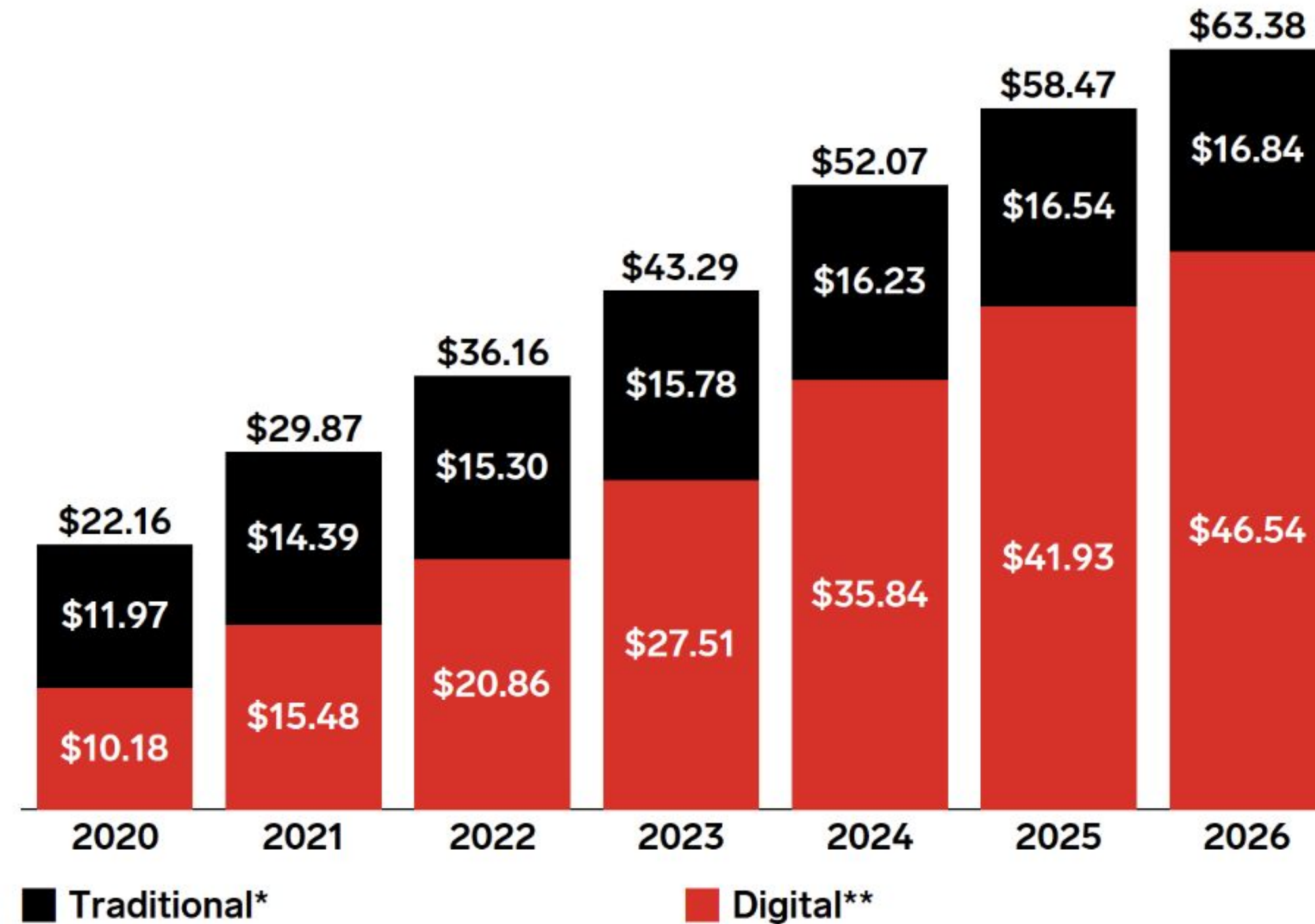
1. US	\$345.99
2. China*	\$166.13
3. Japan	\$49.91
4. UK	\$46.05
5. Germany	\$26.89
6. France	\$17.17
7. Brazil	\$15.60
8. Australia	\$14.53
9. Canada	\$14.35
10. South Korea	\$11.43

Note: includes digital (desktop/laptop, mobile, and other internet-connected devices), directories, magazines, newspapers, out-of-home, radio, and TV;

**excludes Hong Kong*

Source: eMarketer, March 2022

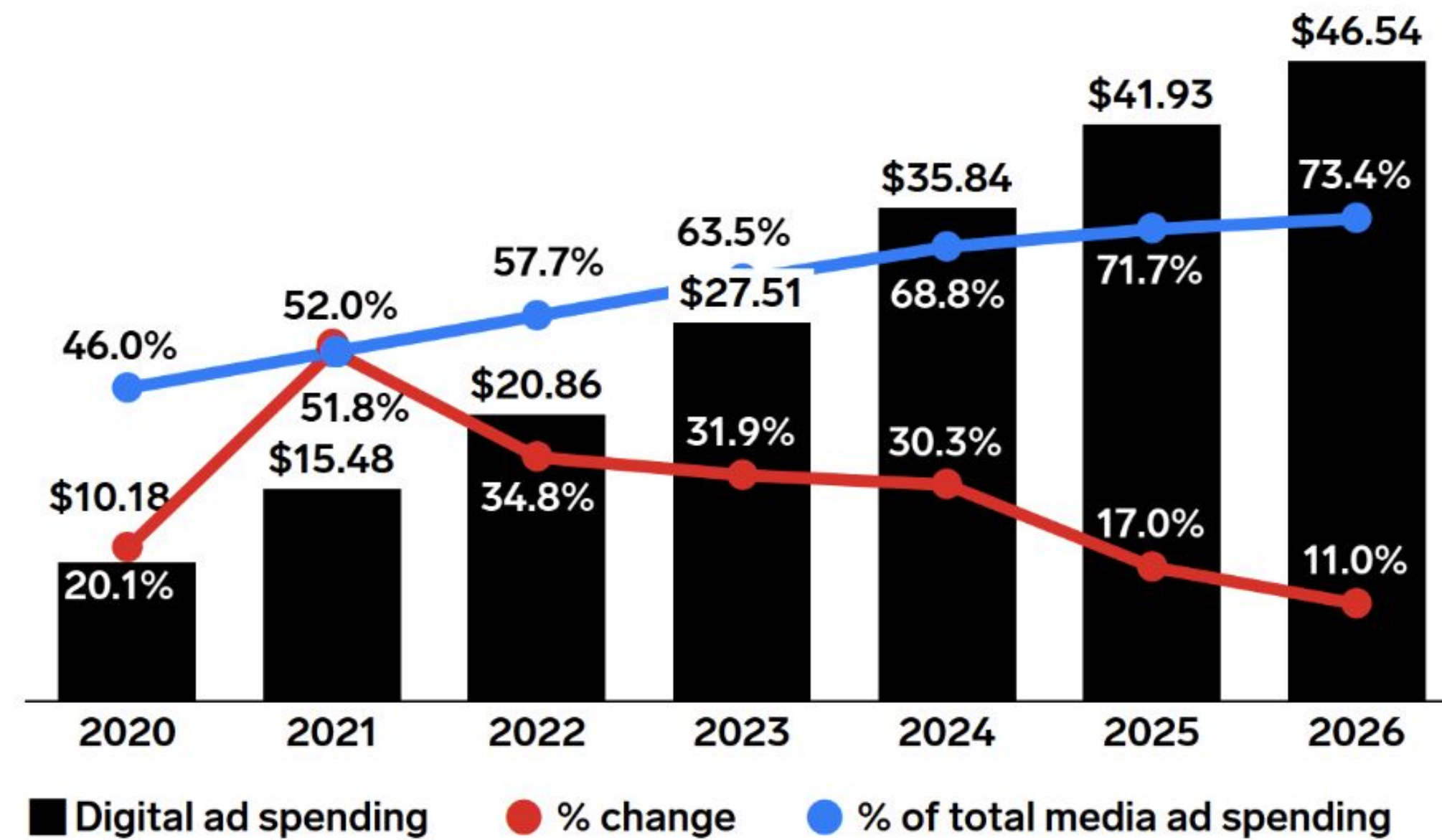
Traditional* vs. Digital Ad Spending in Latin America, 2020-2026**
billions



*Note: numbers may not add up to total due to rounding; *includes directories, magazines, newspapers, out-of-home, radio, and TV; **includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices in all formats*

Source: eMarketer, March 2022

Digital Ad Spending in Latin America, 2020-2026
billions, % change, and % of total media ad spending

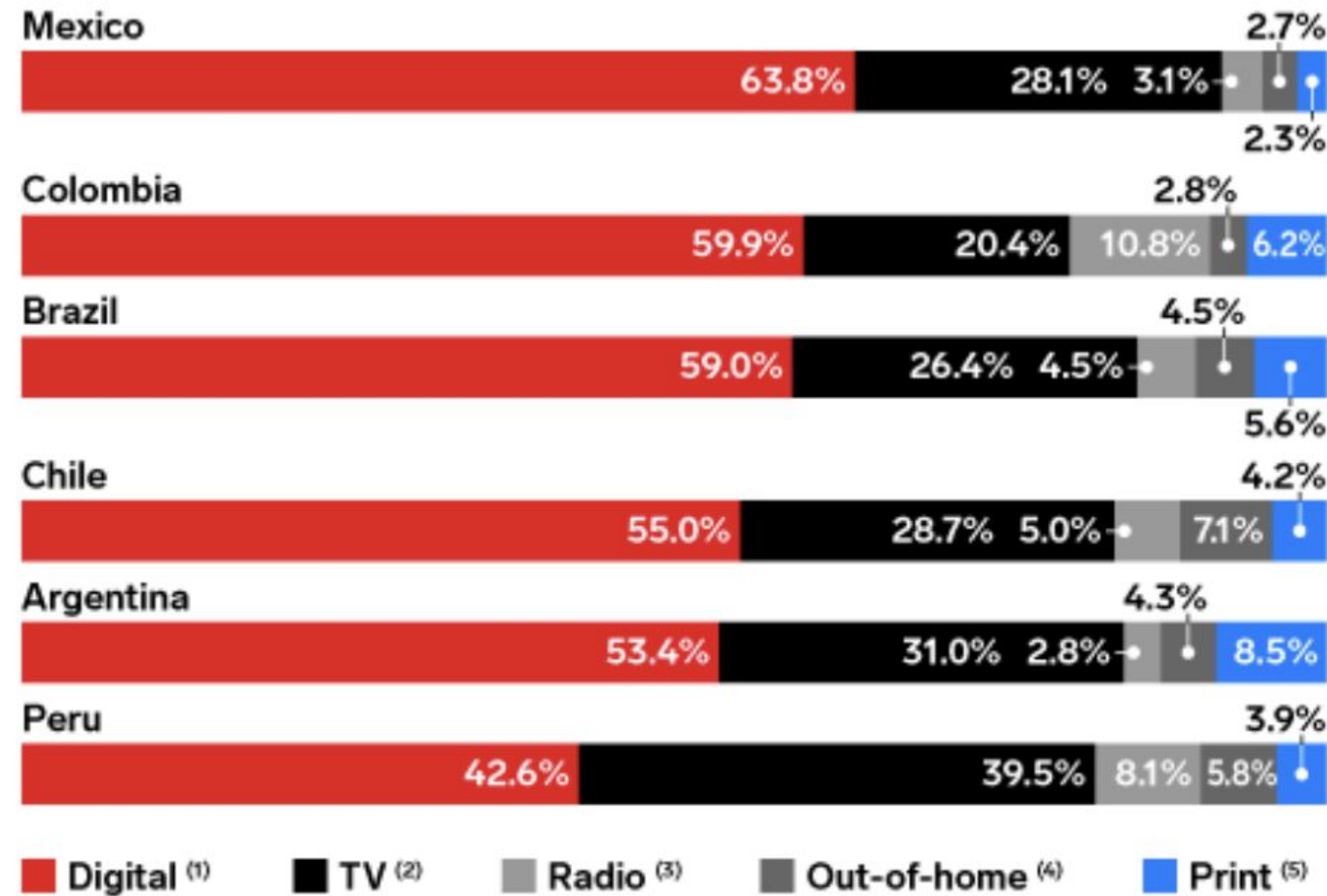


Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms

Source: eMarketer, March 2022

Total Media Ad Spending Share in Select Countries in Latin America, by Media, 2022

% of total

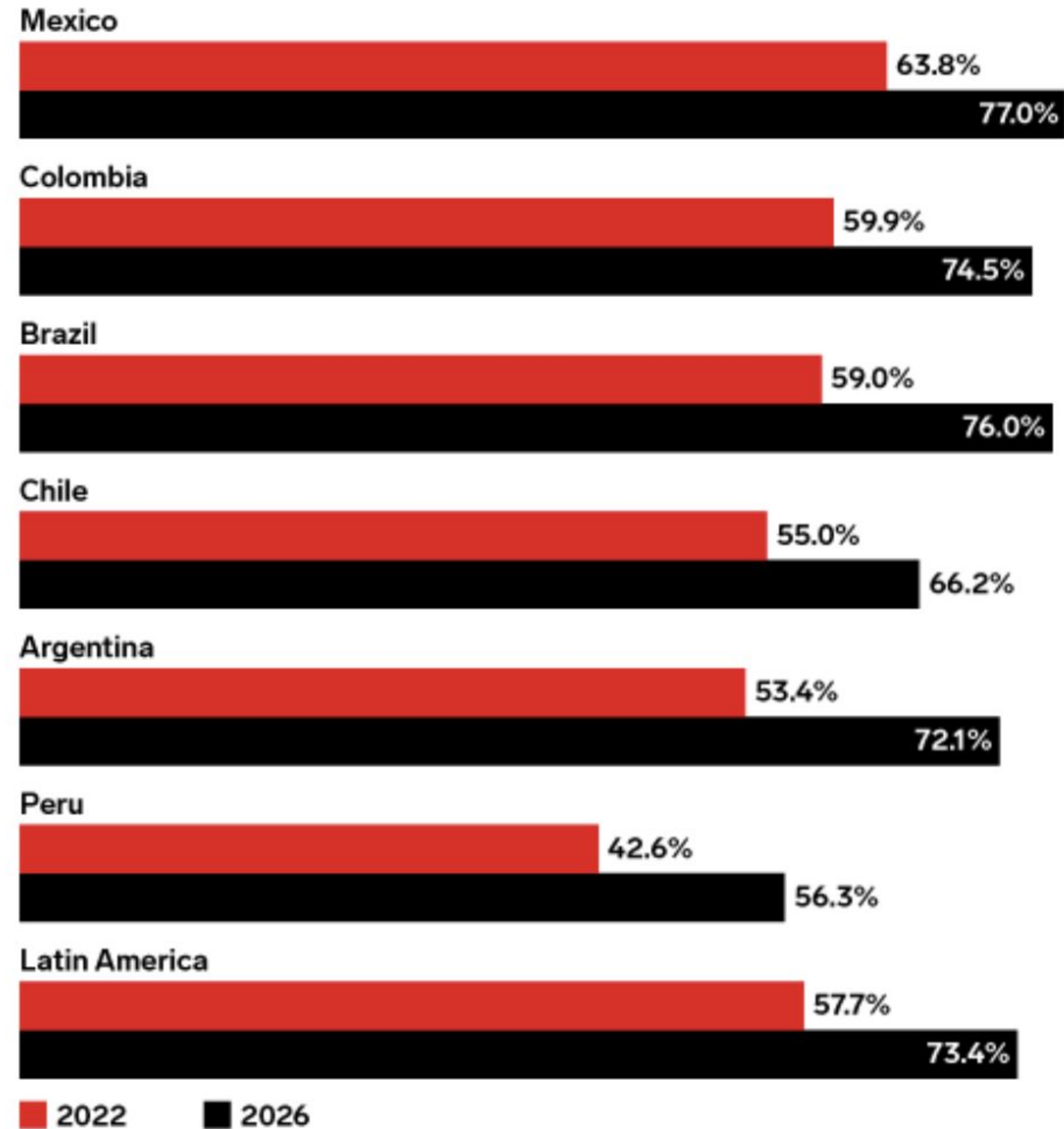


Note: numbers may not add up to 100% due to rounding; (1) includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms; excludes SMS, MMS, and P2P messaging-based advertising; (2) includes broadcast TV and cable TV; (3) excludes off-air radio and digital; (4) includes alternative, billboards, cinema, street furniture, and transit; (5) includes B2B, consumer, local, and Sunday magazines as well as classified, local, national, and retail newspapers

Source: eMarketer, March 2022

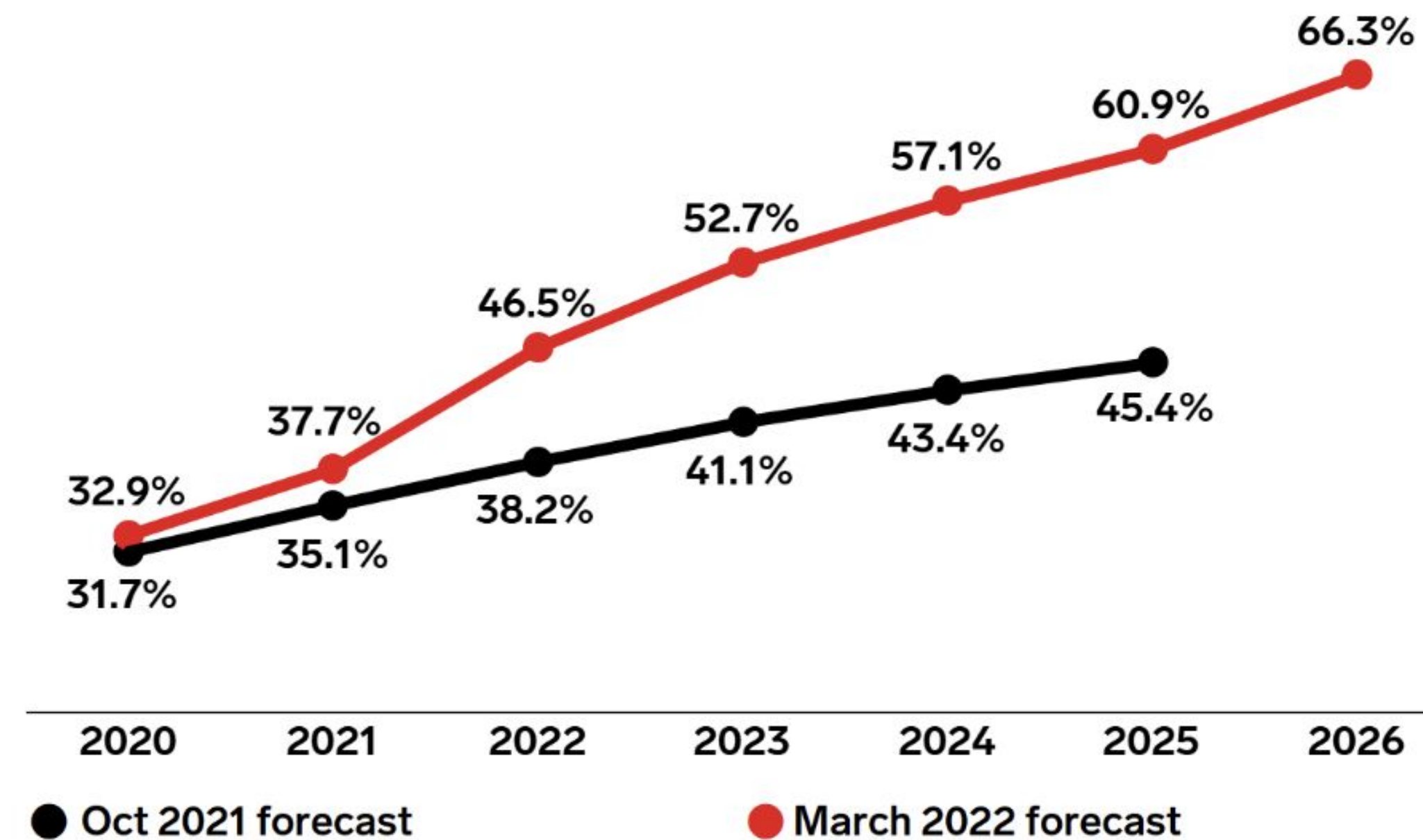
Digital Ad Spending Share in Latin America, by Country, 2022 & 2026

% of total media ad spending



How Has Our Forecast for Mobile Ad Spending Share in Latin America Changed? 2020-2026

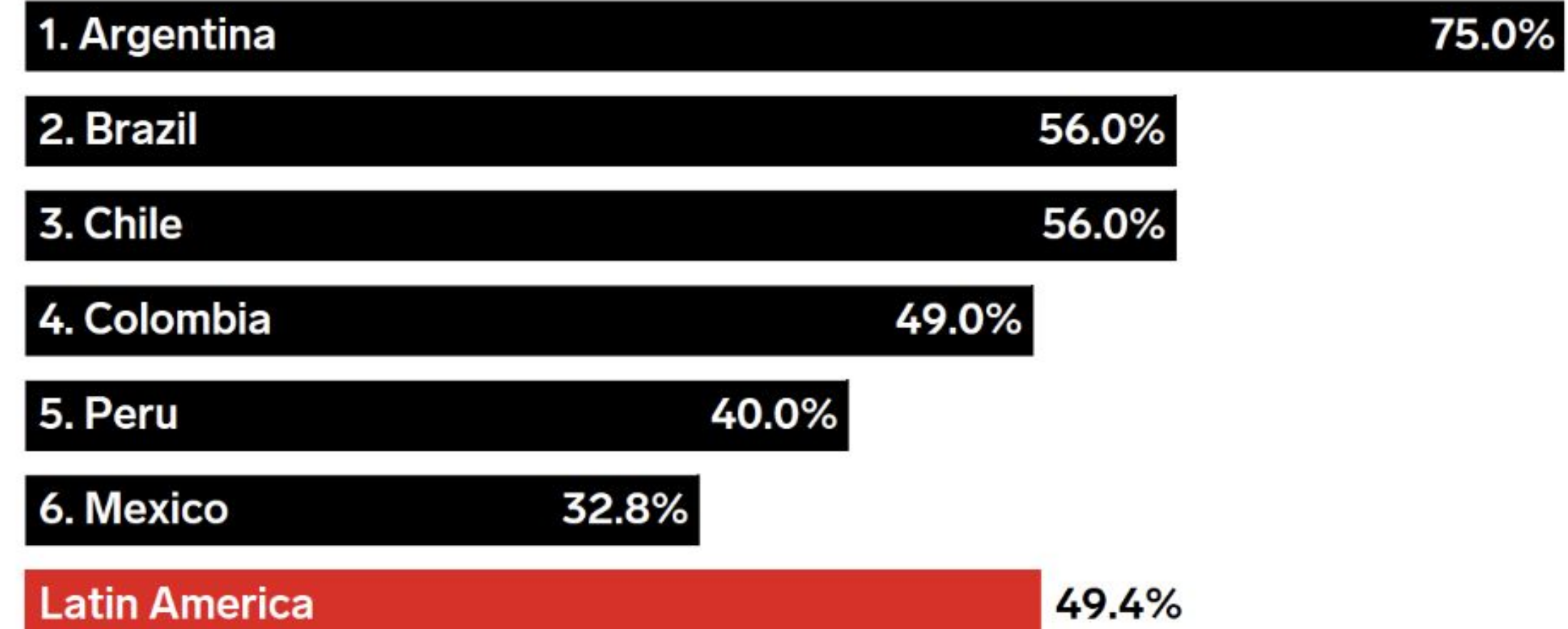
% of total media ad spending, Oct 2021 vs. March 2022



Note: includes display (banners, rich media, and video) and search; includes ad spending on tablets; excludes SMS, MMS, and P2P messaging-based advertising
Source: eMarketer, March 2022

Mobile Ad Spending Growth in Latin America, by Country, 2022

% change



Note: includes display (banners, rich media, and video) and search; includes ad spending on tablets; excludes SMS, MMS, and P2P messaging-based advertising
Source: eMarketer, March 2022

Mobile Ad Spending* Share in Latin America**, by Industry, 2017-2021

% of total

	2017	2018	2019	2020	2021
Consumer packaged goods (CPG)	14.9%	17.3%	22.7%	27.7%	22.8%
Retail	14.0%	6.3%	13.7%	15.4%	15.8%
Telecommunications	10.1%	9.3%	5.8%	14.0%	13.3%
Business and services	0.4%	2.8%	13.9%	0.8%	11.8%
Automotive	23.0%	13.9%	7.7%	8.8%	8.4%
Finance	15.2%	13.9%	14.0%	8.5%	5.9%
Technology	5.9%	6.2%	2.8%	2.1%	5.8%
Entertainment	5.5%	21.9%	5.5%	5.3%	5.3%
Government	1.2%	4.5%	5.3%	3.3%	3.7%
Medical and health	2.4%	1.7%	4.1%	5.8%	3.7%
Education	0.8%	0.5%	1.2%	4.9%	1.7%
Travel	3.1%	1.2%	2.1%	0.7%	1.1%
Agriculture/livestock	0.2%	0.0%	0.2%	1.2%	0.4%
Real estate	0.2%	0.0%	0.3%	0.3%	0.3%
Seasonal	3.3%	0.5%	0.7%	1.1%	0.0%

Lowest share  Greatest share

Note: represents activity tracked by Logan, broader industry metrics may vary; numbers may not add up to 100% due to rounding; *includes display, nonmedia, rich media, and video mobile ad formats; **Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, and Peru
Source: Logan, "Mobile Report 2021," Mar 23, 2022

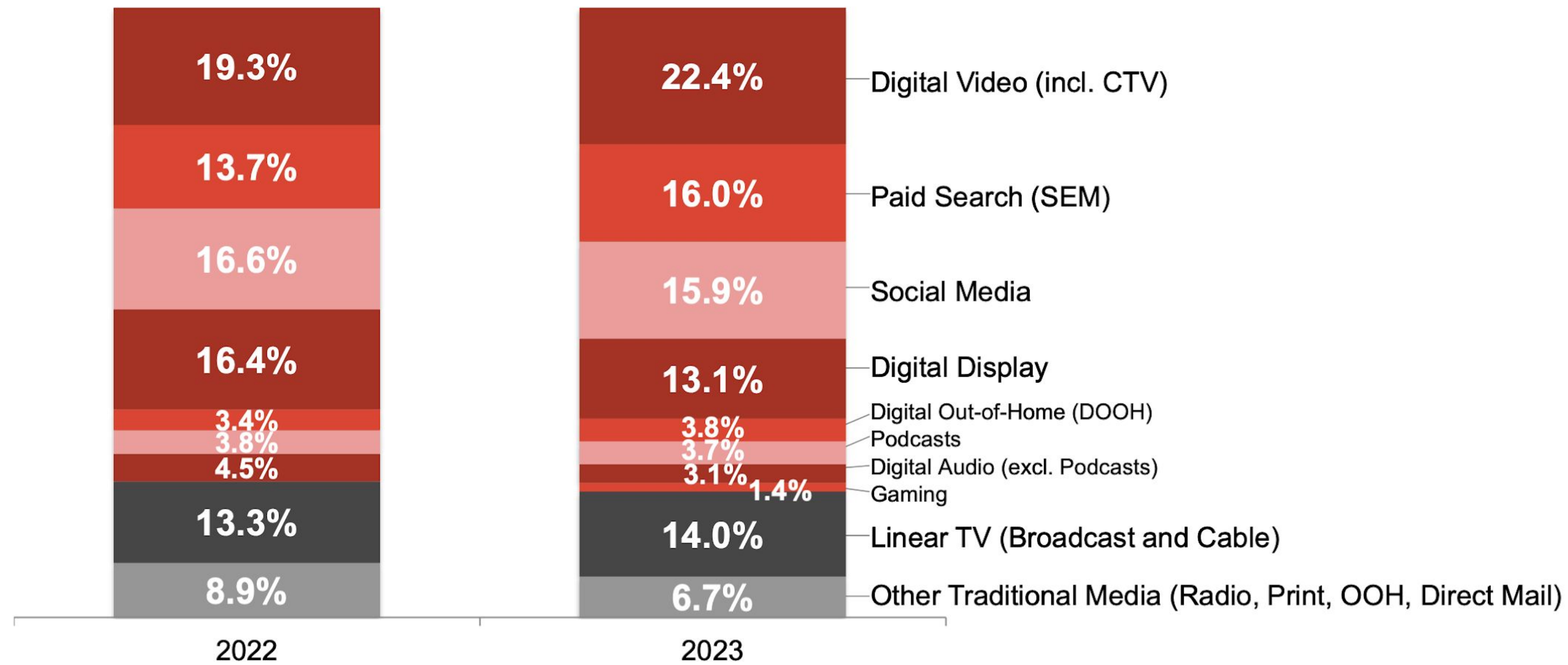
¿Qué hay de nuevo?

Top 3 Goals for 2023 Media Investments

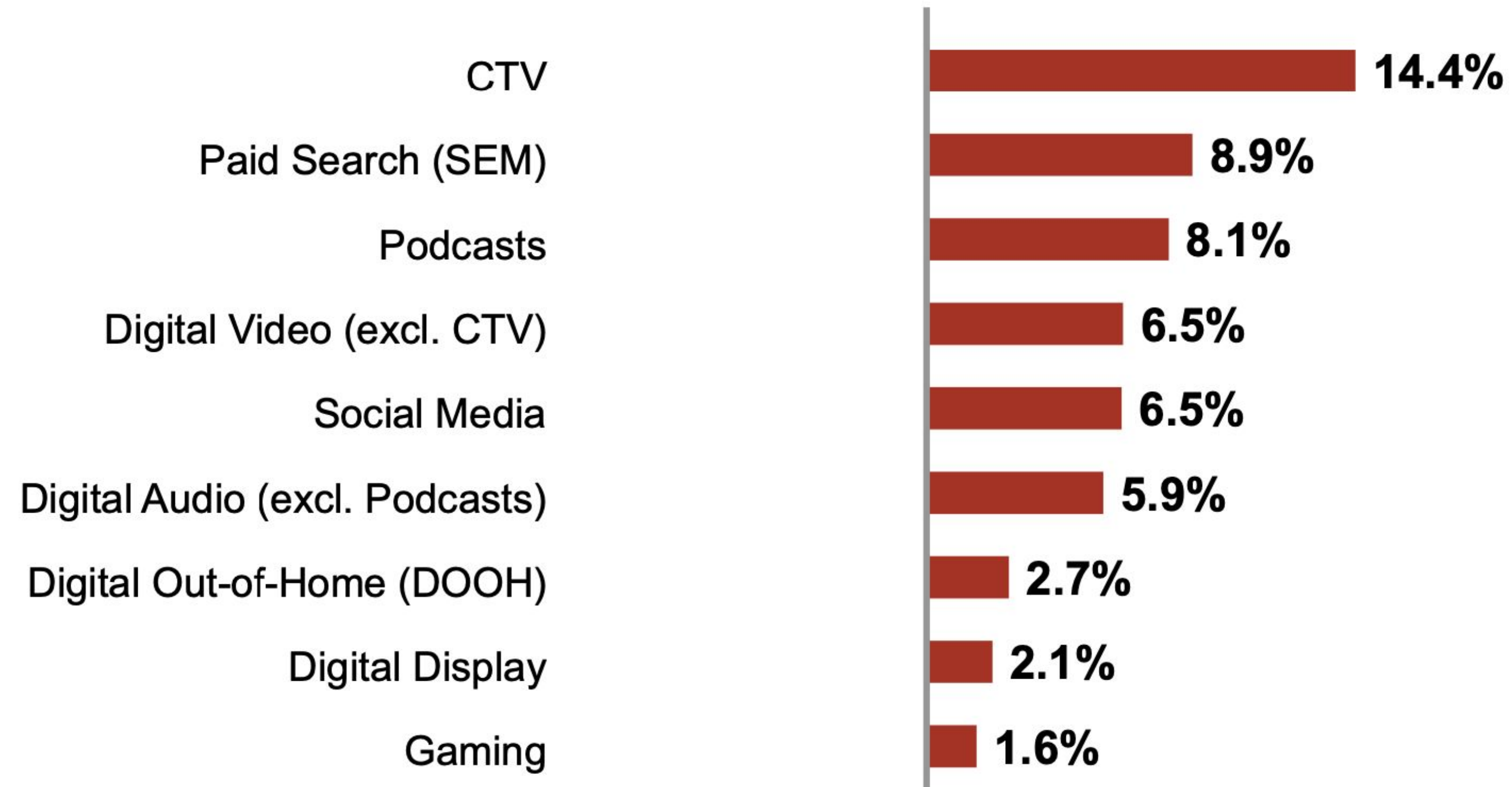


Digital video (incl. CTV) will continue to capture the greatest % share in 2023

Ad Spend % Share by Channel – 2023 vs. 2022



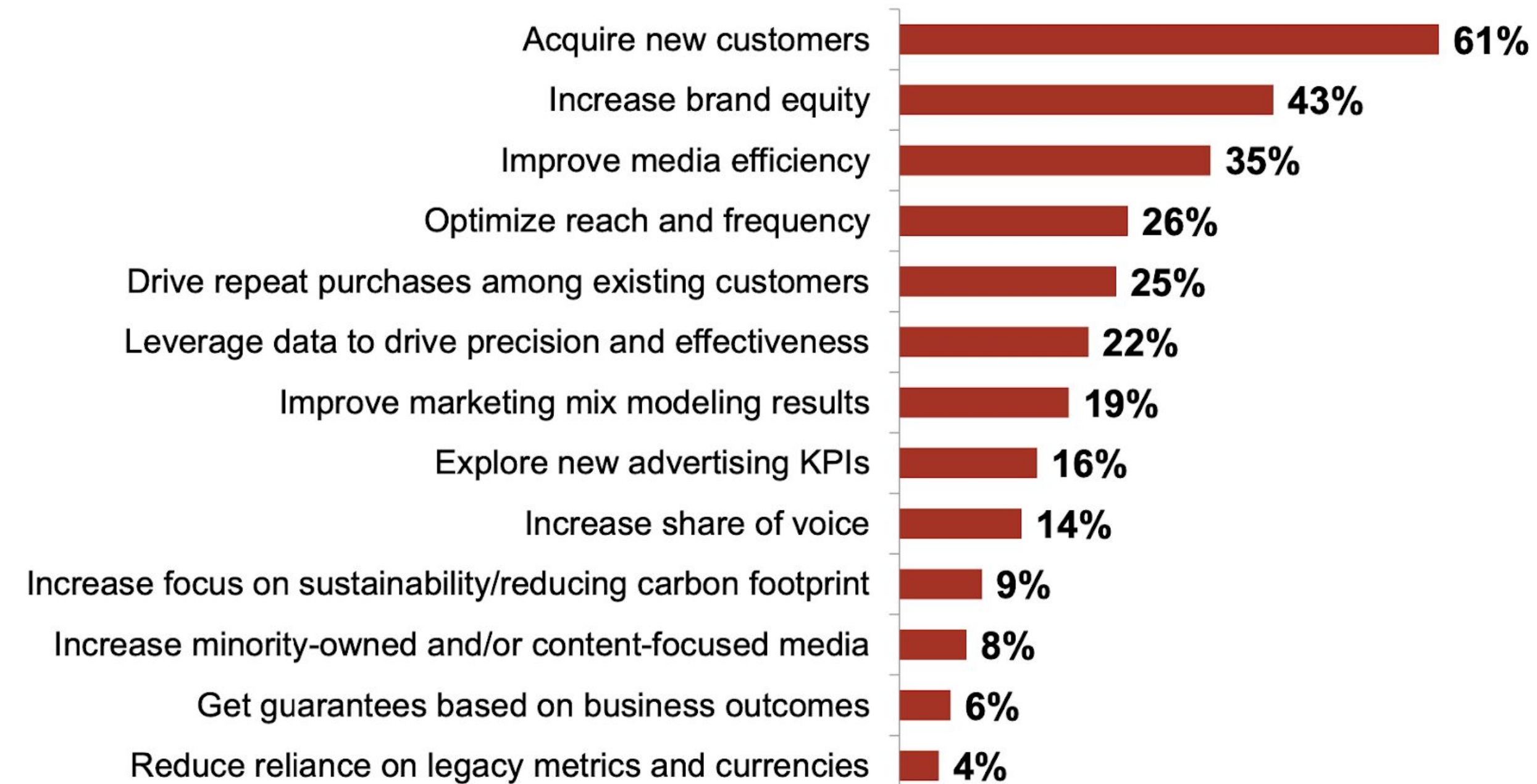
% Change Projected 2023 Ad Spend vs. 2022, by Channel



Customer acquisition is by far buyers' top goal for 2023 media investments

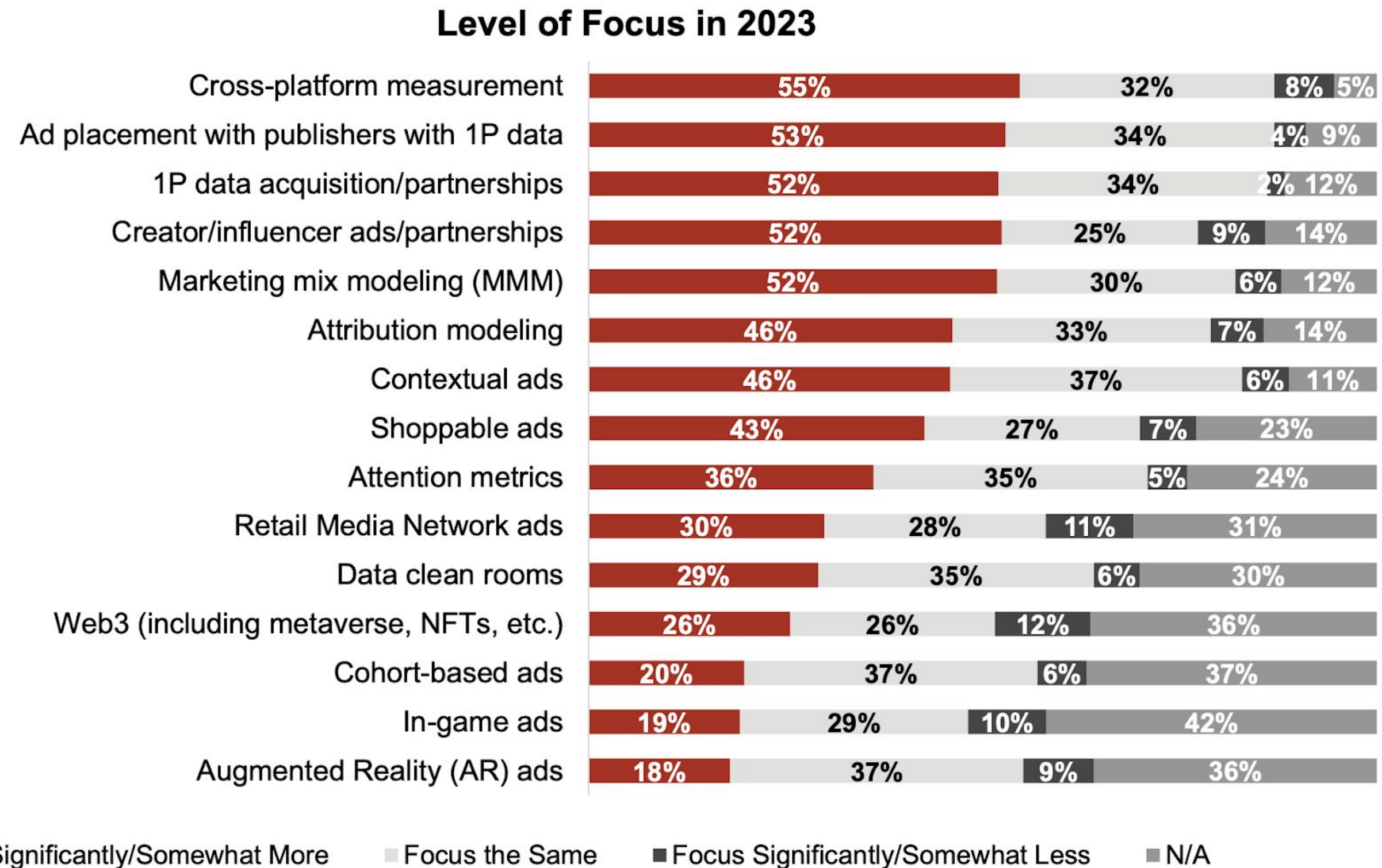
More than 1/3 of buyers also cite increasing brand equity and improving media efficiency as top goals for 2023 media investments.

Top 3 Goals for 2023 Media Investments



Measurement, 1st party data, and leveraging creators will be the greatest focus areas

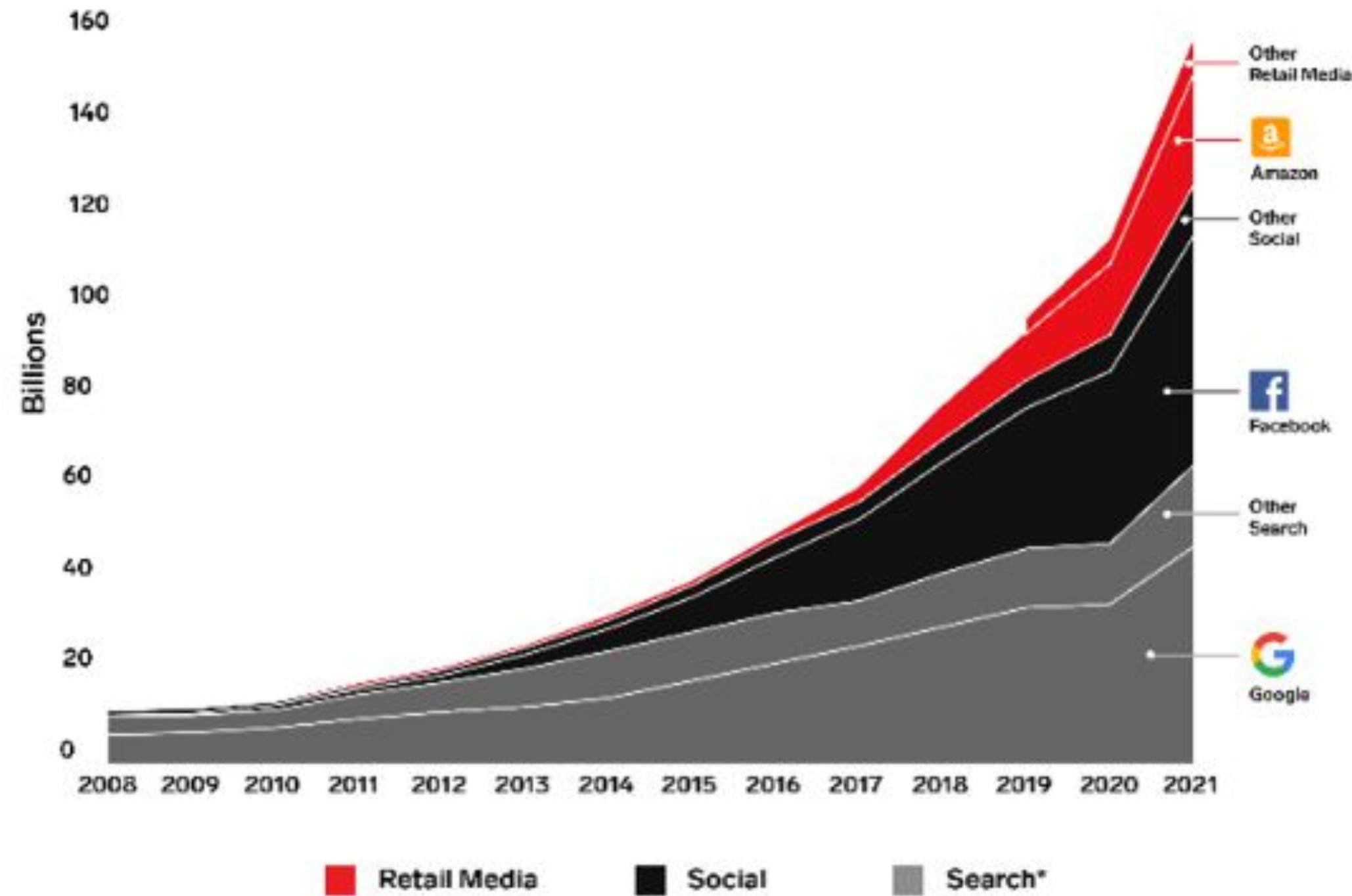
Nearly 1/3 to almost 1/2 of buyers will also focus more on shoppable ads, retail media network (RMN) ads, and data clean rooms.



RTM !

Retail Media: The 3rd Wave of Digital Advertising, by Top Player, 2008-2021

billions

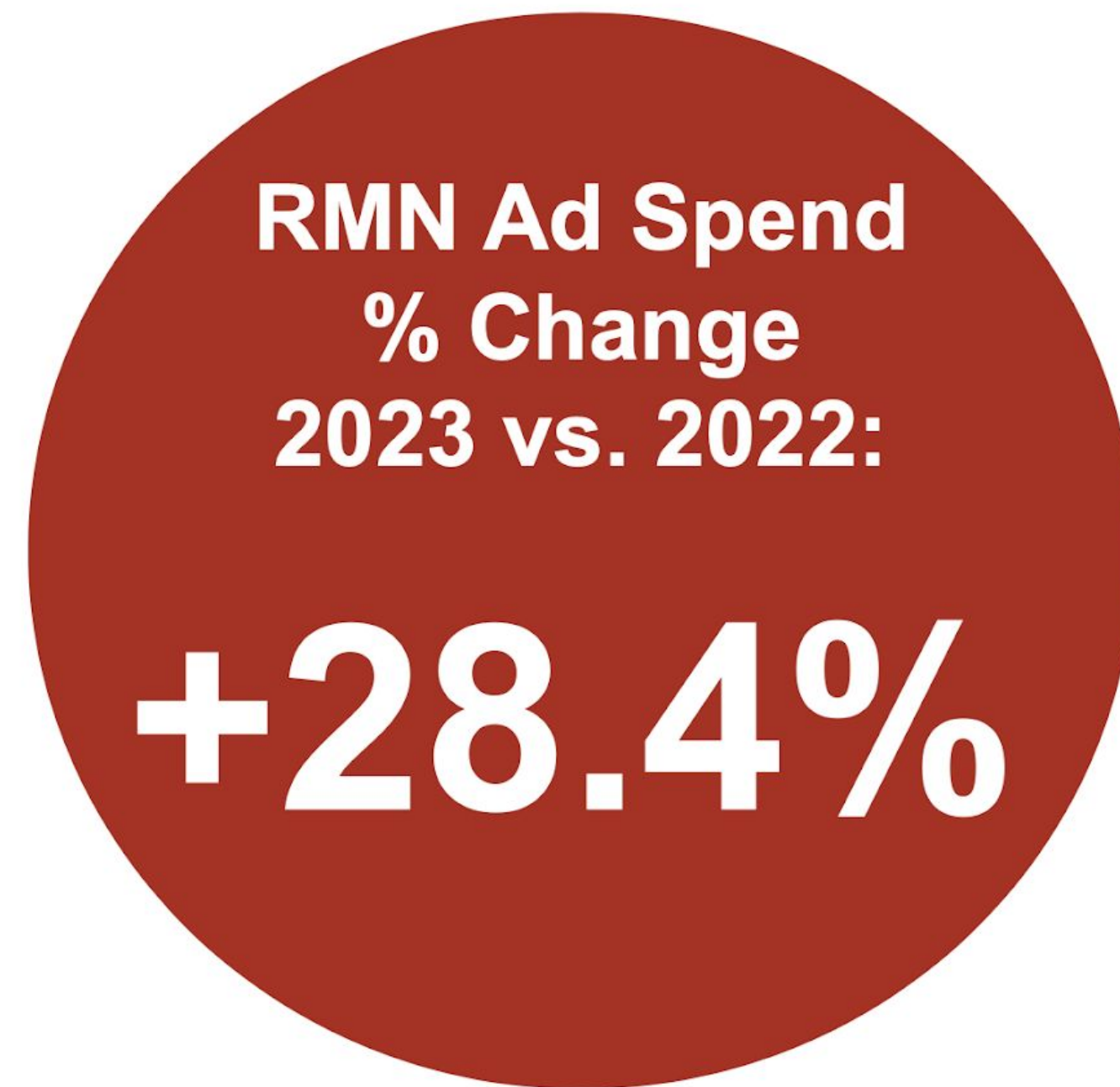


Note: *excludes search ad revenues from retail media advertising

Methodology: Estimates are based on the analysis of various elements related to the ad spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers, and other industry leaders.

Source: eMarketer, Oct 2021

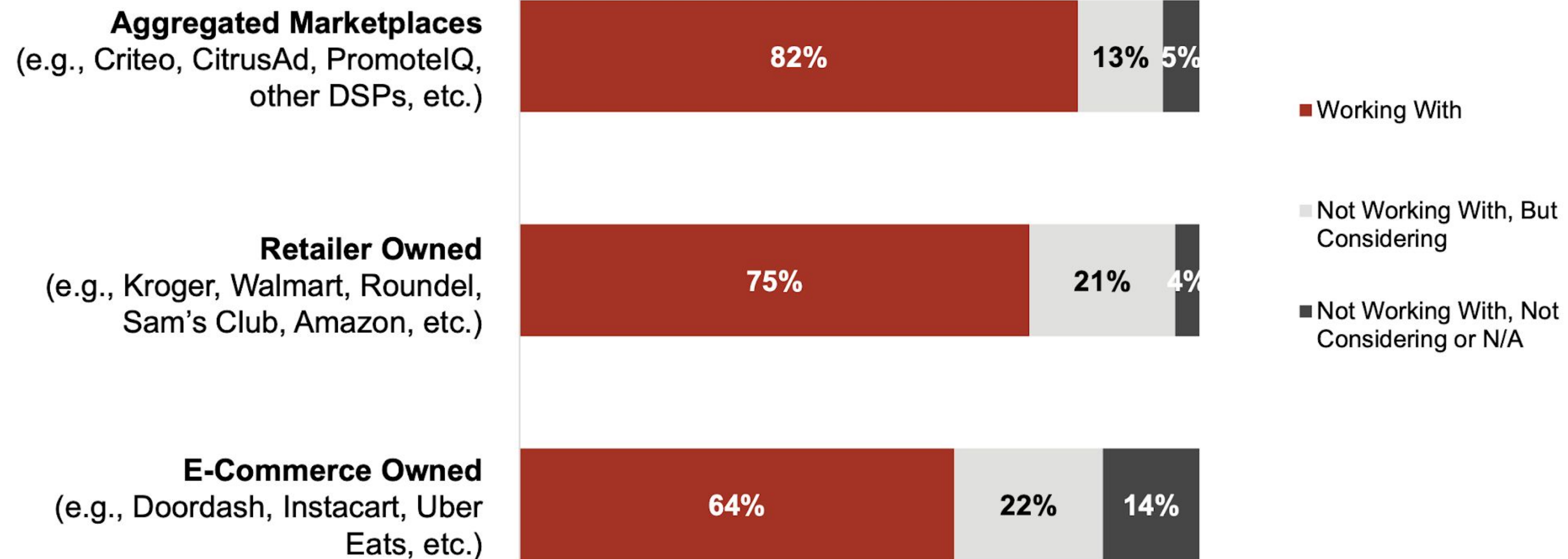
Buyers project 2023 RMN ad spend to be up 28.4% YoY



RMN ad investment is diverse: spread across multiple partner types

Types of RMN Ad Partners Being Leveraged

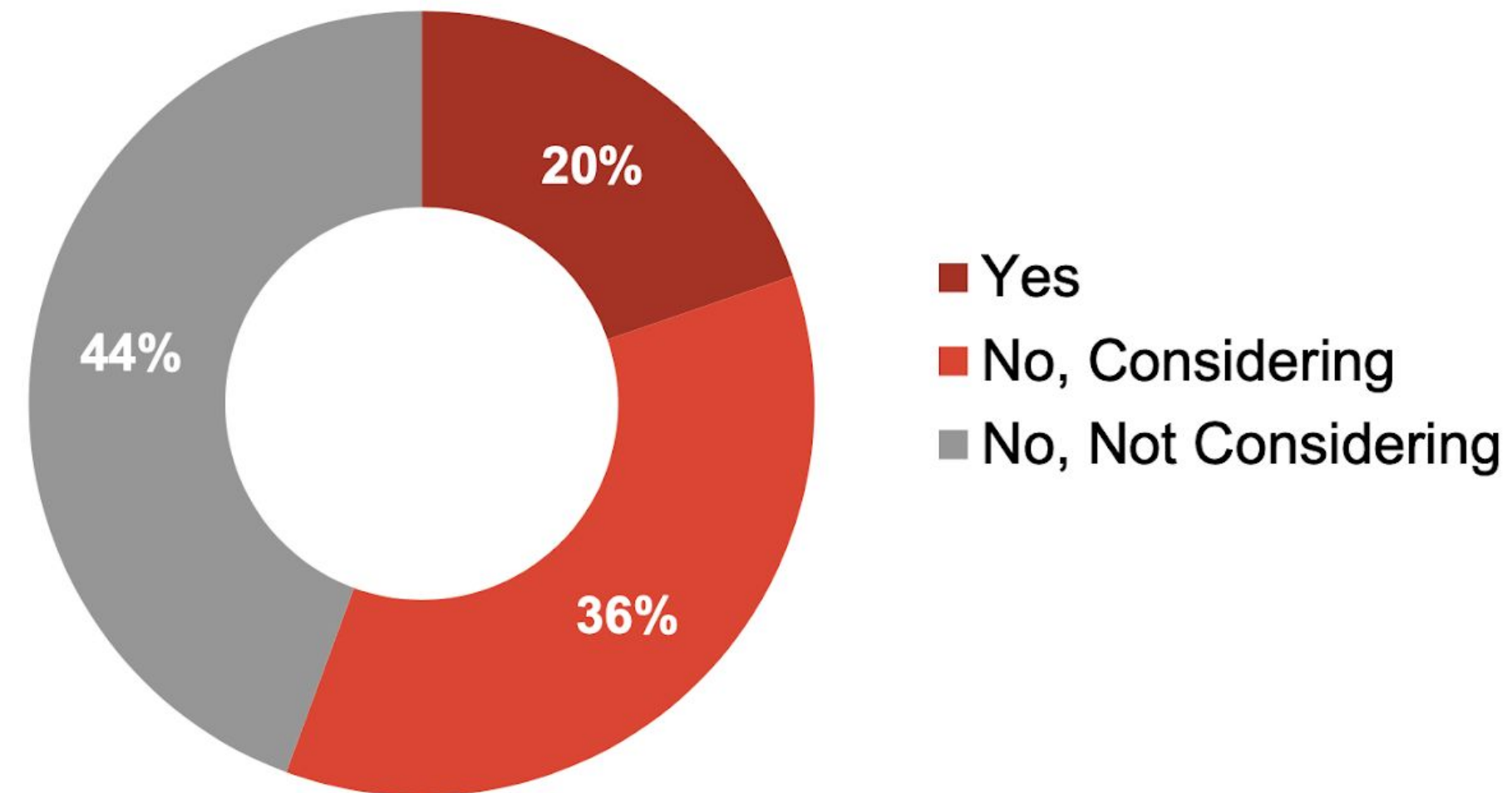
Among those currently investing in RMN advertising



The metaverse is gaining attention from advertisers

Current Investment in Metaverse Advertising / Marketing

Metaverse definition: virtual, internet-based experiences that bridge offline and online worlds, where people can customize avatars, play games, shop, interact and virtually attend live events

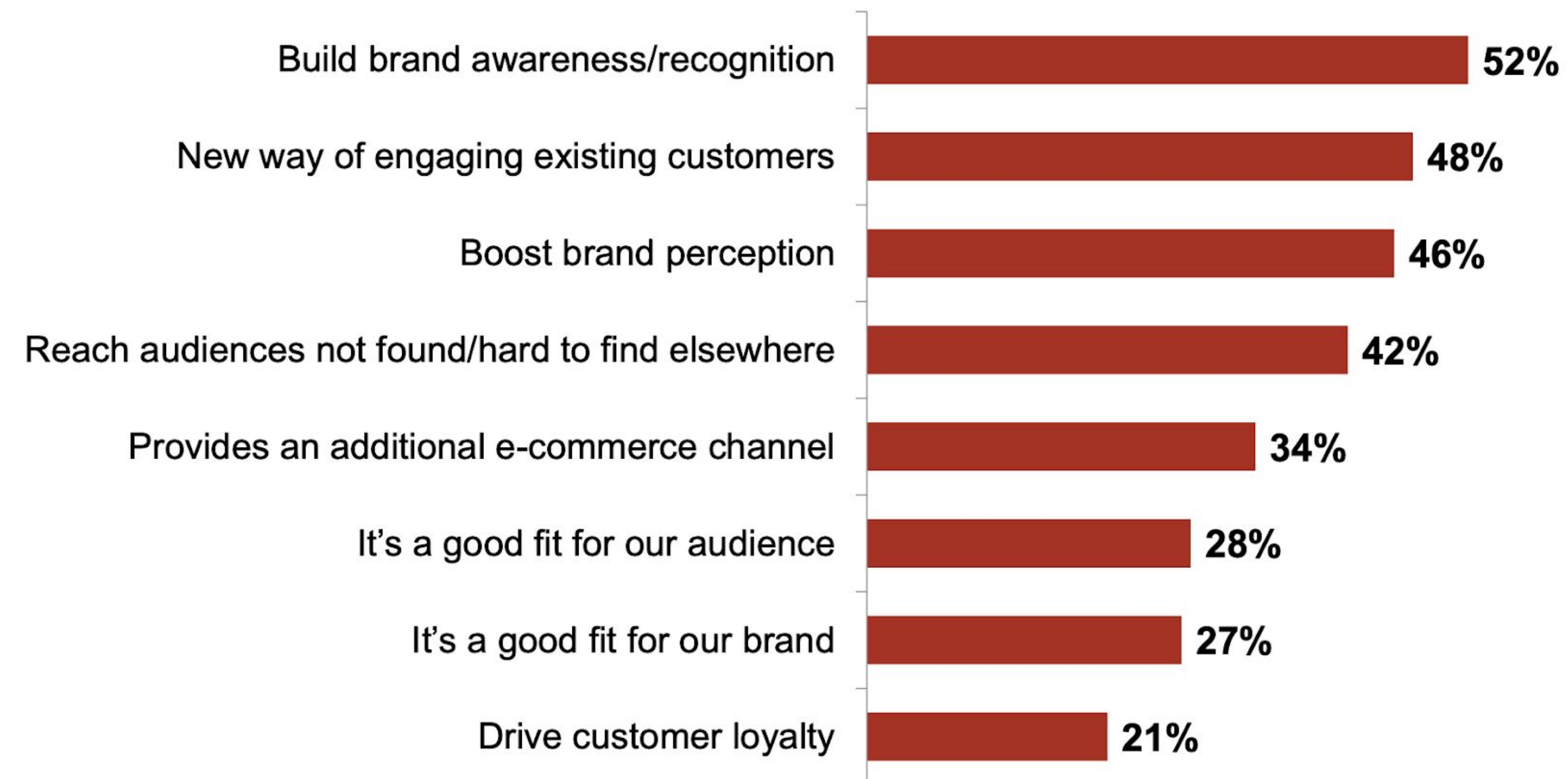


Early stage metaverse tactics are focused on upper funnel metrics

Boosting brand awareness and perception as well as engaging customers in a new way are top reasons for metaverse advertising investment.

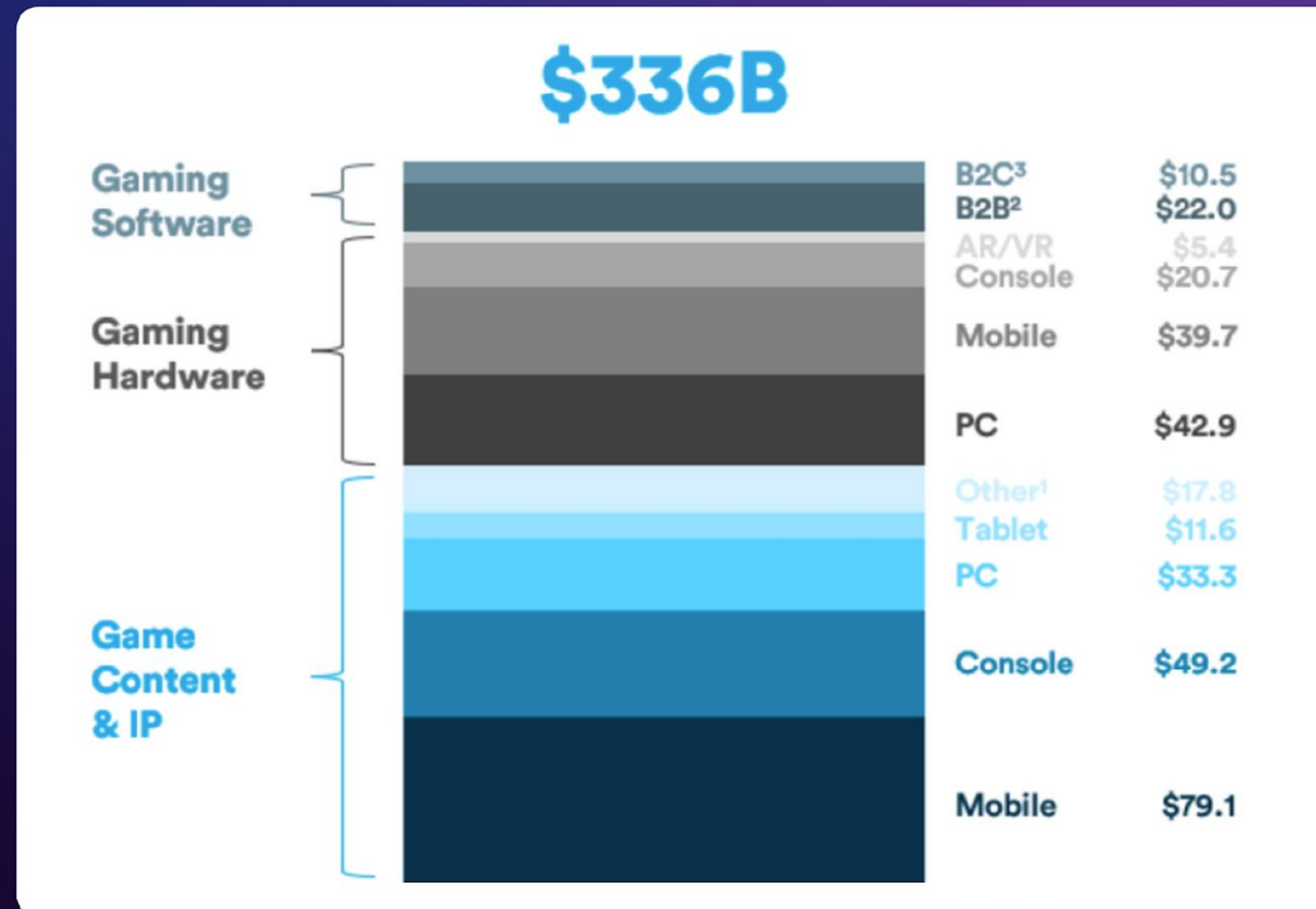
Reasons for Investing in Metaverse Advertising / Marketing

Among those currently investing/considering investing in metaverse advertising / marketing



Gaming !

Gaming is the new media



+ 3 Milliards
Joueurs dans le monde

1.6 Milliards
d'entre eux **jouent**
1 fois par semaine

20% des internautes
intéressés par l'esport

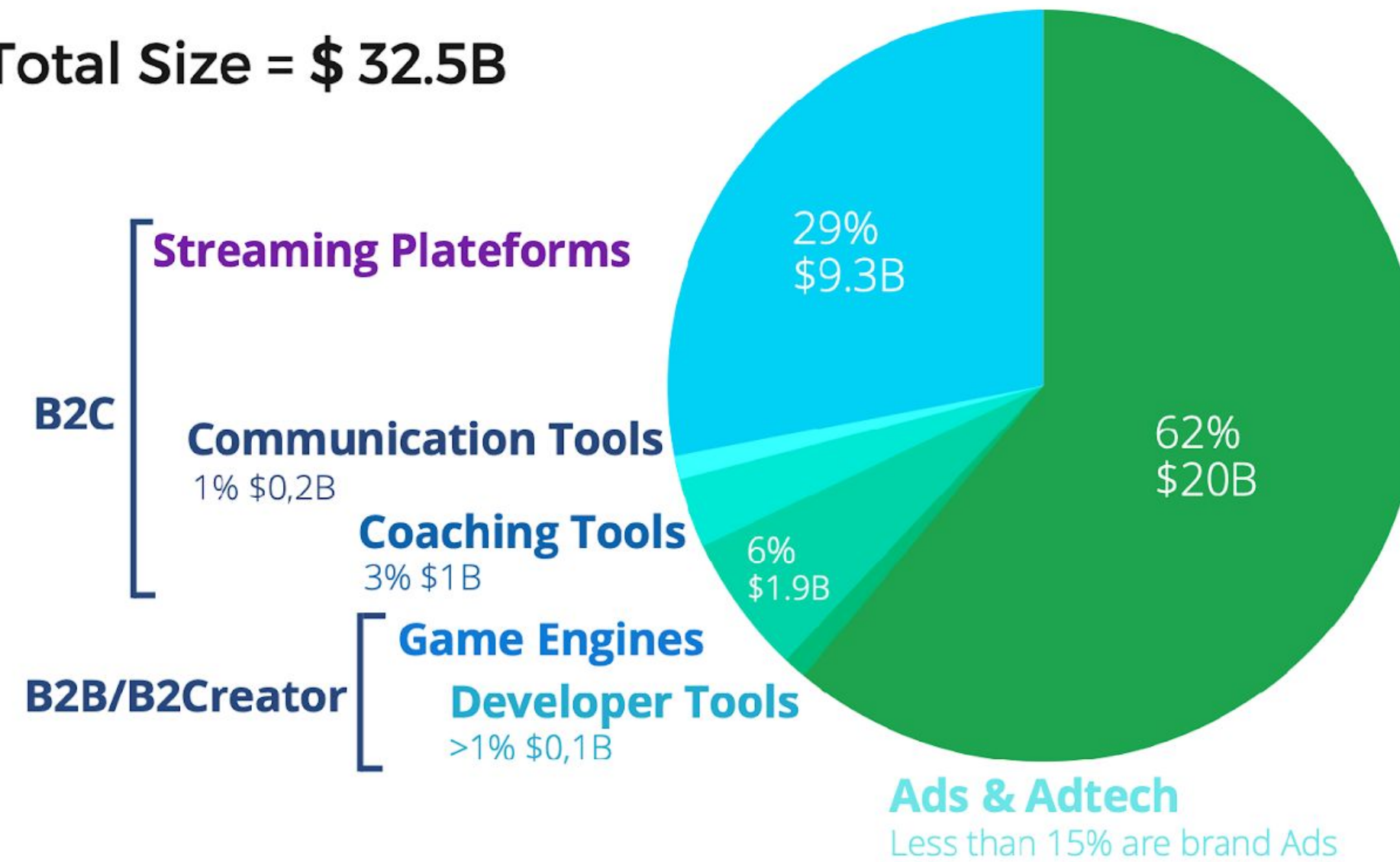
Gaming is the new media

Un marché publicitaire estimé à \$20B avec principalement des éditeurs de jeux pour annonceurs. En augmentation anticipée de 12% par an.



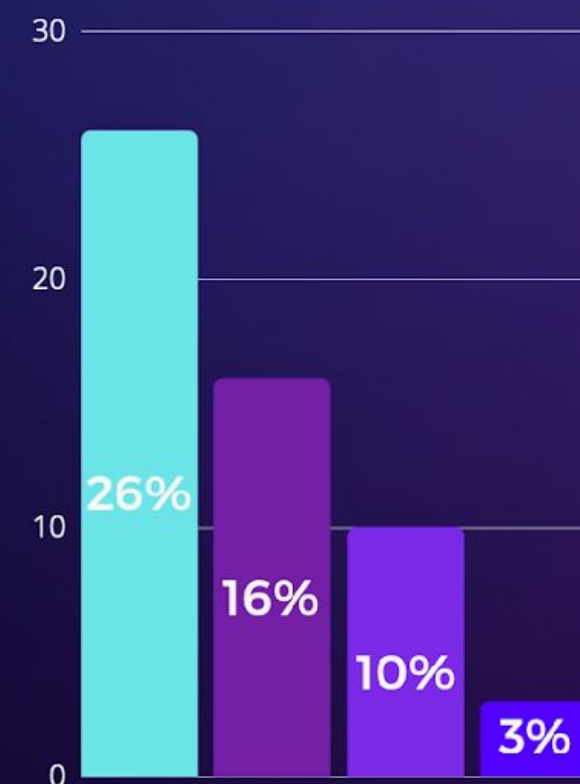
**B2B vs. B2C
BREAKDOWN**

Total Size = \$ 32.5B

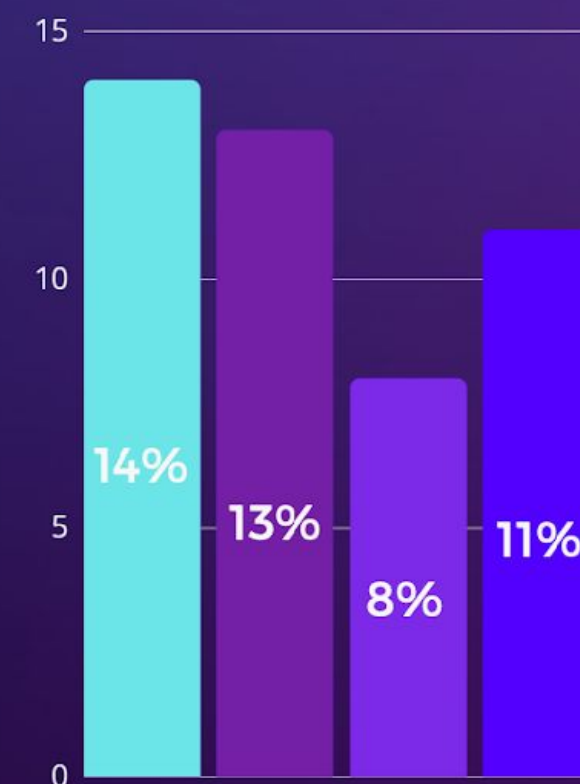


Gaming is the new media

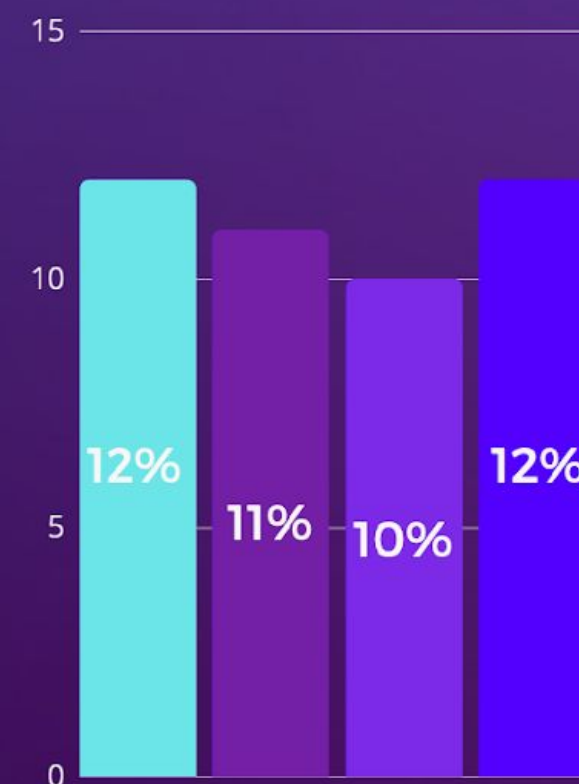
■ Génération Z (1995-2009) ■ Millennials (1980-1994)
■ Genration X (1965-1979) ■ Boomers (1945-1964)



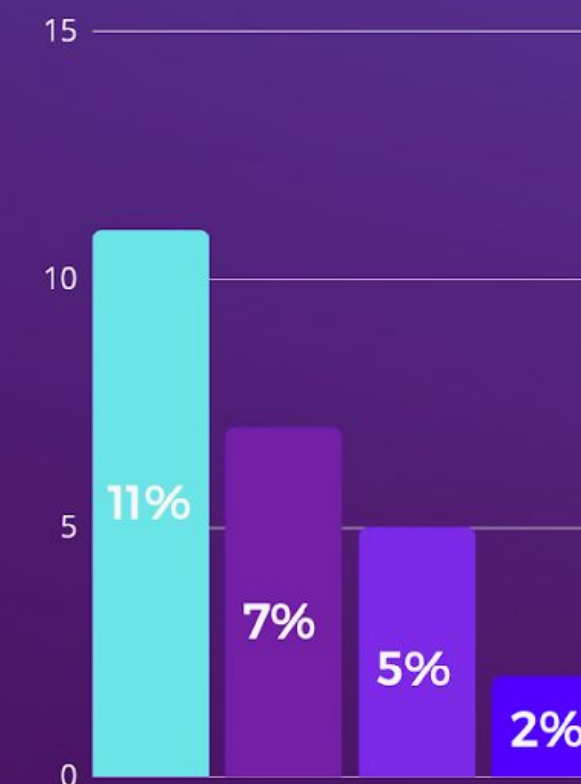
Play vidéo games



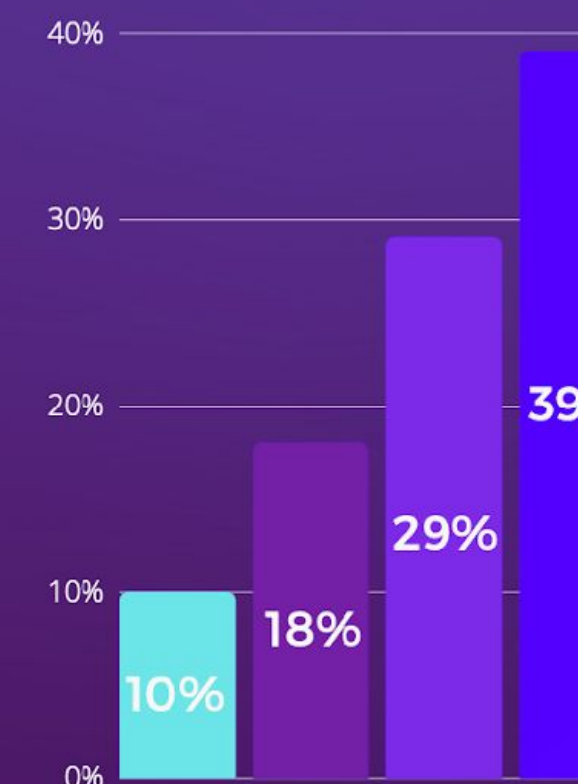
Listen to music



Browse the internet



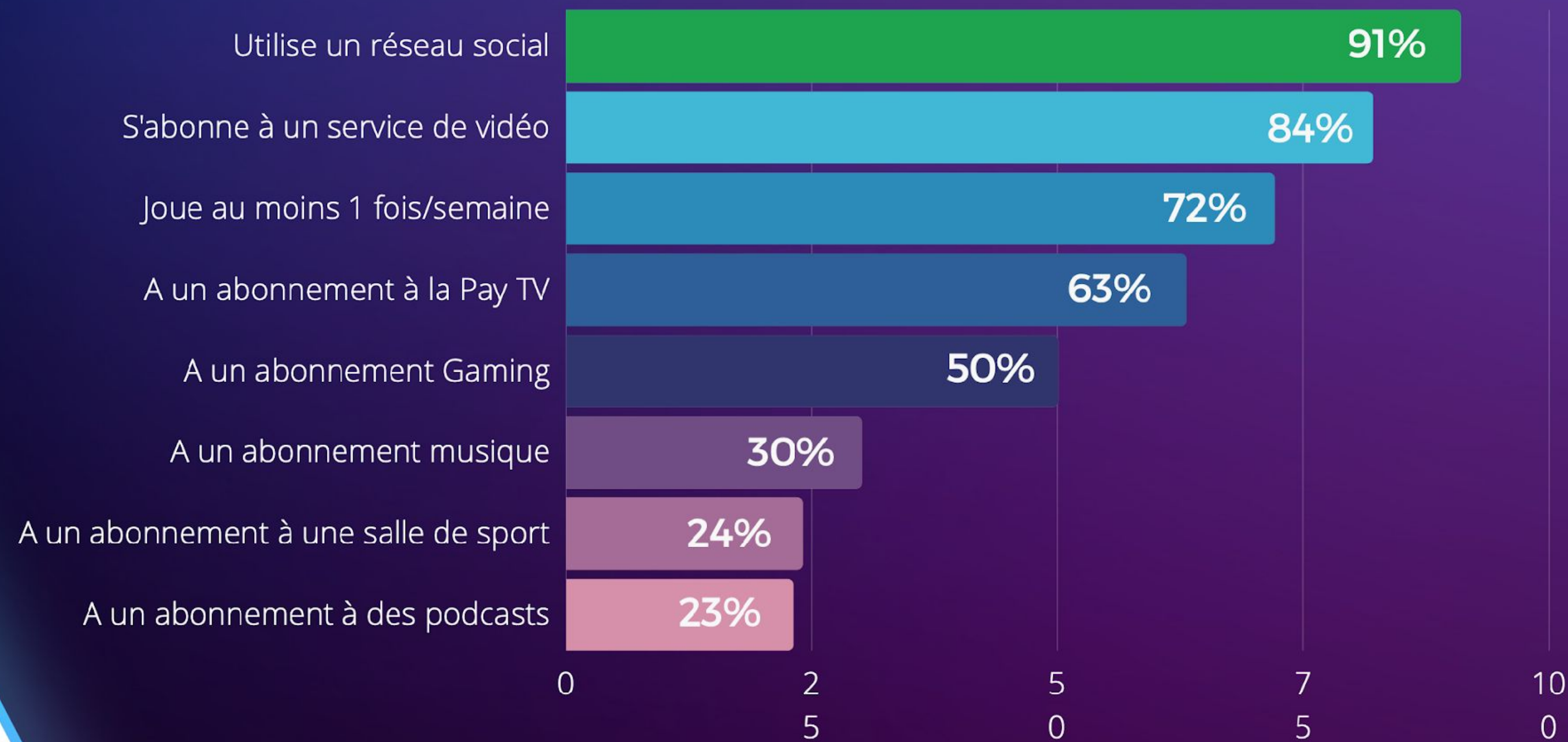
Engage on social
plateforms



Watch TV Shows or
movies at home

Gaming is the new media

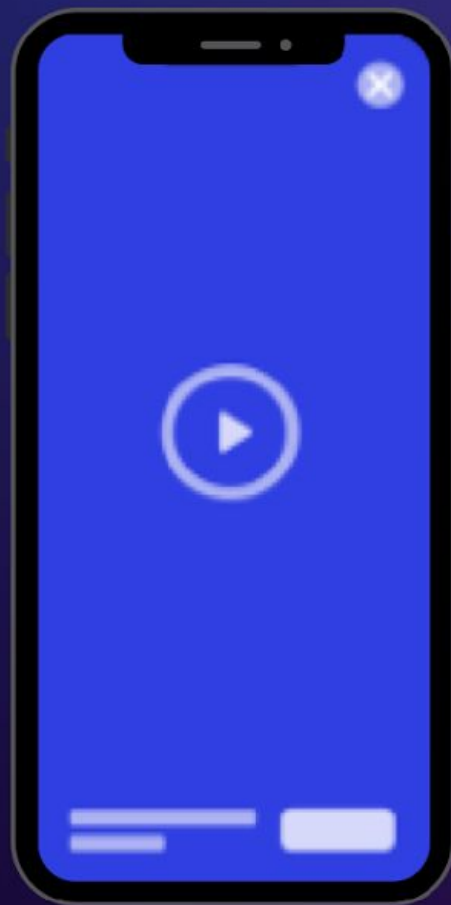
Pourcentage de la population US qui :



70% du temps passé devant un écran l'est soit devant les réseaux sociaux, soit dans un jeu vidéo. Le jeu vidéo est une dépense culturelle essentielle

Gaming is the new media

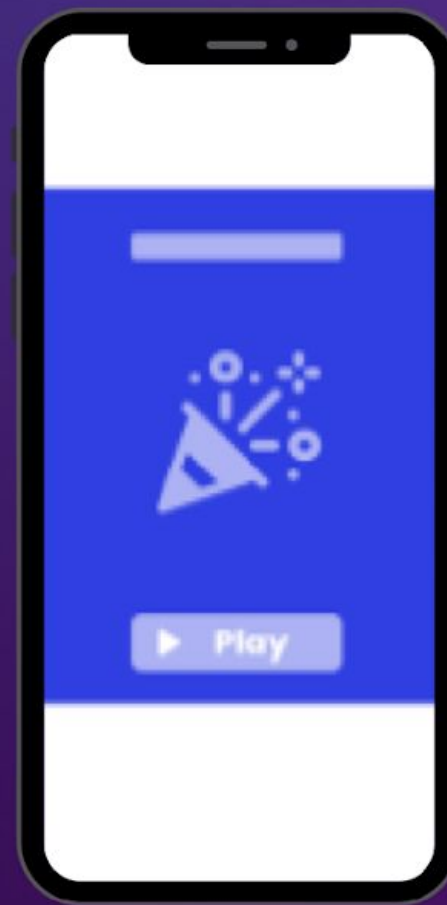
Publicités pendant les durées de jeux



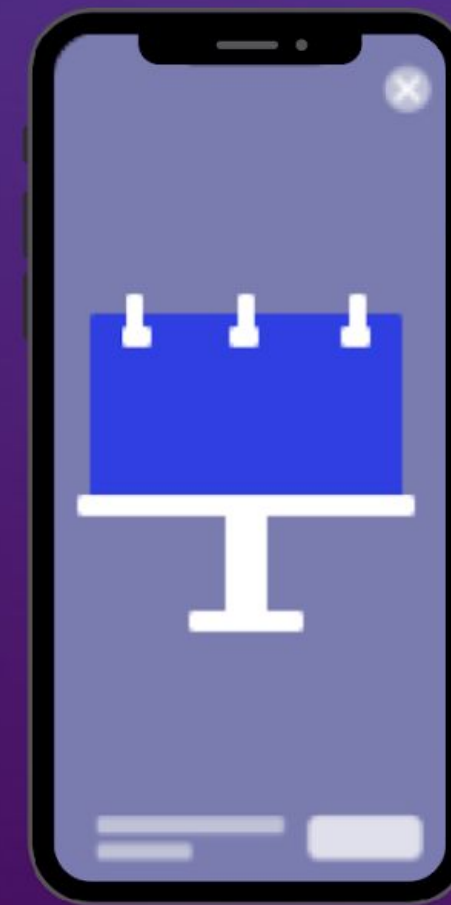
Interstitielles



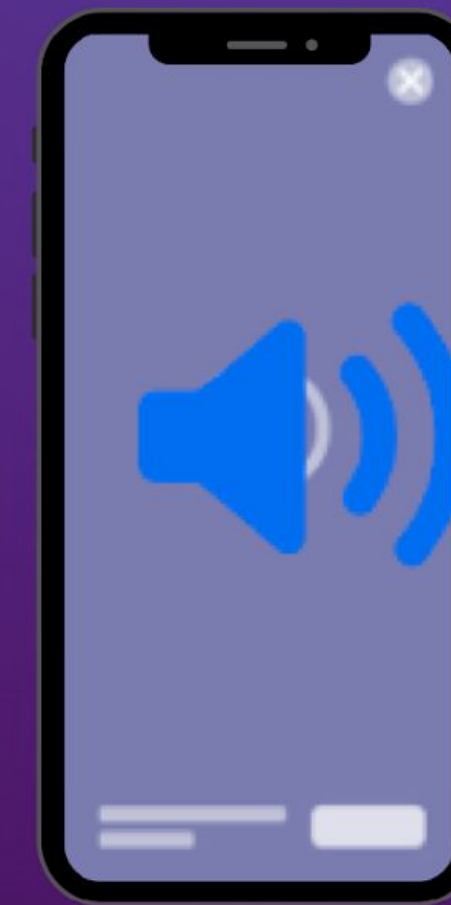
Bannières



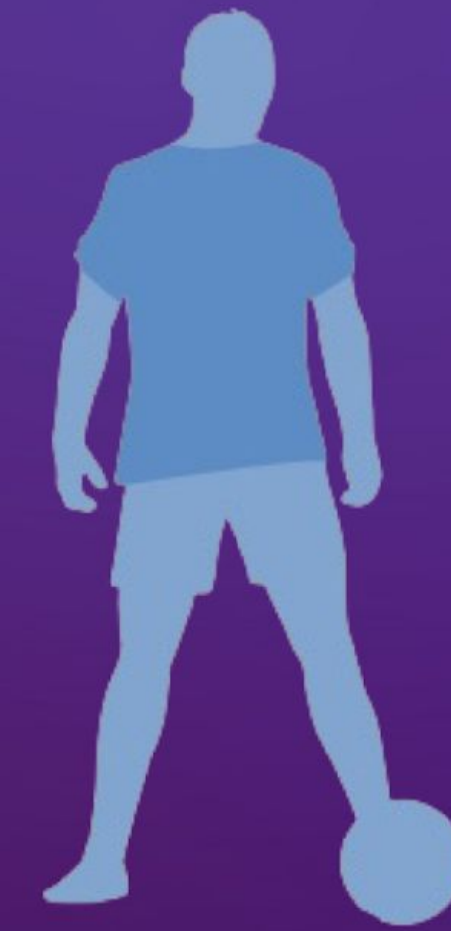
A récompenses



Textures 3D, Objets



Audio



Sponsorship

Panorama

Les différents types de joueurs :

PENDANT LE TEMPS DE JEU	Audience	Canal	Caractéristiques
	Hypercasual Gamers		25,3M de joueurs Score Intensité 2h
	Casual Gamers		12,4M de joueurs Score Intensité 2h
	Gamers		3,8M de joueurs Score Intensité 3h
	Core Gamers		0,8M de joueurs Score Intensité 3h

DTC

Who are today's DTC consumers?

DTC brands have entered the mainstream. 97% of the UK online population is aware of at least one leading brand, 39% have purchased a DTC product and 10% have purchased from five DTC brands or more^[5].

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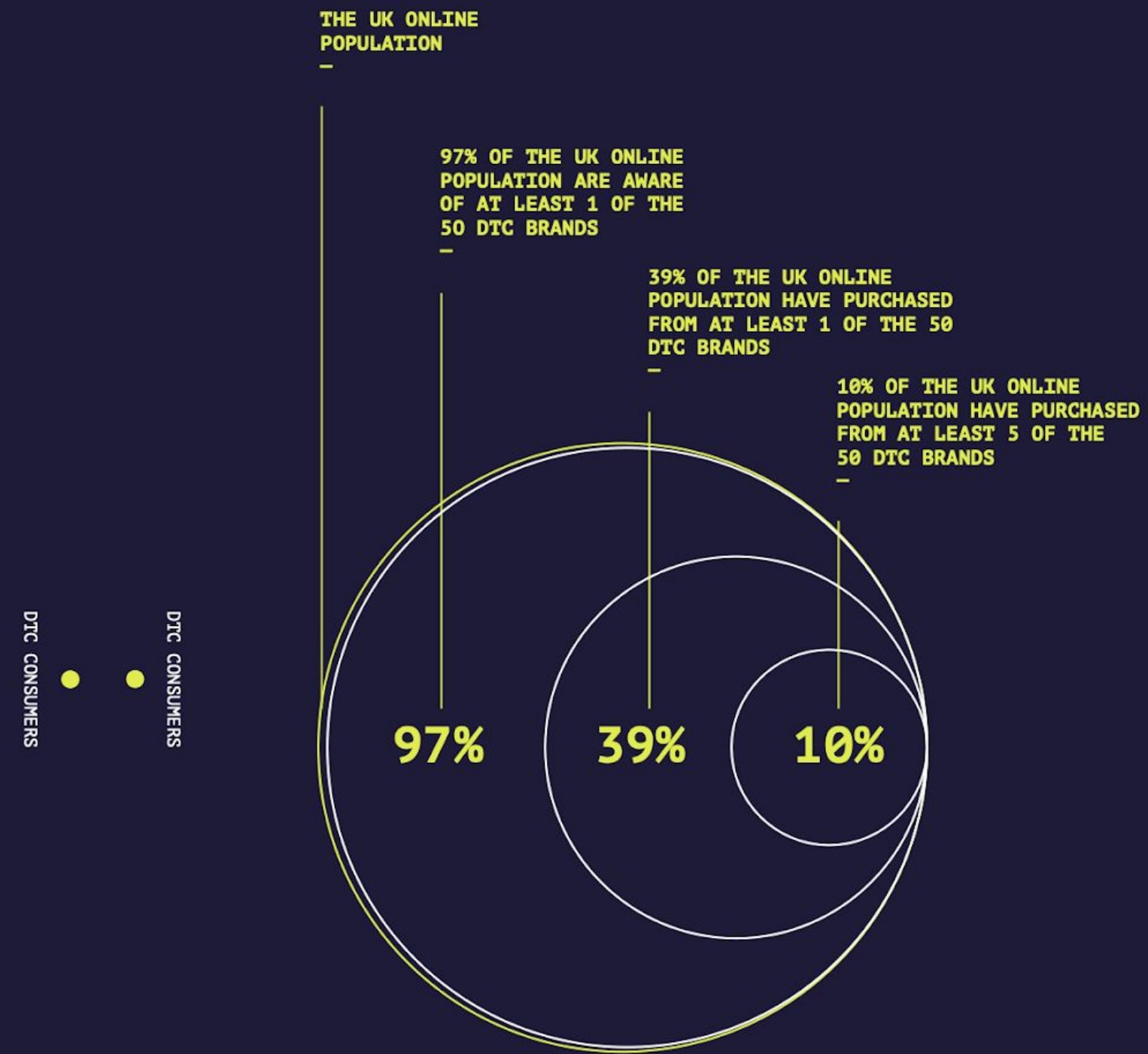


EXHIBIT: ENGAGEMENT WITH LEADING DTC BRANDS AMONG THE UK ONLINE POPULATION^[6]

Opportunities for media owners and agencies

The growth and success of DTC brands suggests that they will become an increasingly important part of the advertising landscape. For media owners and agencies, this presents a significant opportunity to help DTC brands grow, while also sharing in the best practices DTC brands follow.

Key Take-Aways: Shifts In Media & Advertising During 2022

1 Streaming, CTV and Social Media Have Cemented Lasting Changes To Content Consumption:

A sudden snapback to the pre-pandemic status quo hasn't materialized. Global consumers continue to spend more time consuming digital content online — with CTV, streaming, and social media the primary beneficiaries.

2 Attention Is Becoming the New Media Currency:

The proprietary platform landscape continues to evolve at pace. From YouTube to TikTok to Japan's LINE, consumers are open to new and established platforms alike. Rather than fear fragmentation, brands must understand the nuances of how these platforms are being used. In addition, they should explore attention signals, like consumer engagement, that are correlated with campaign outcomes. In summary, they need to embrace solutions and strategies that can focus consumption by platform, region, demographic, engagement signals and more, to win in the battle for attention.

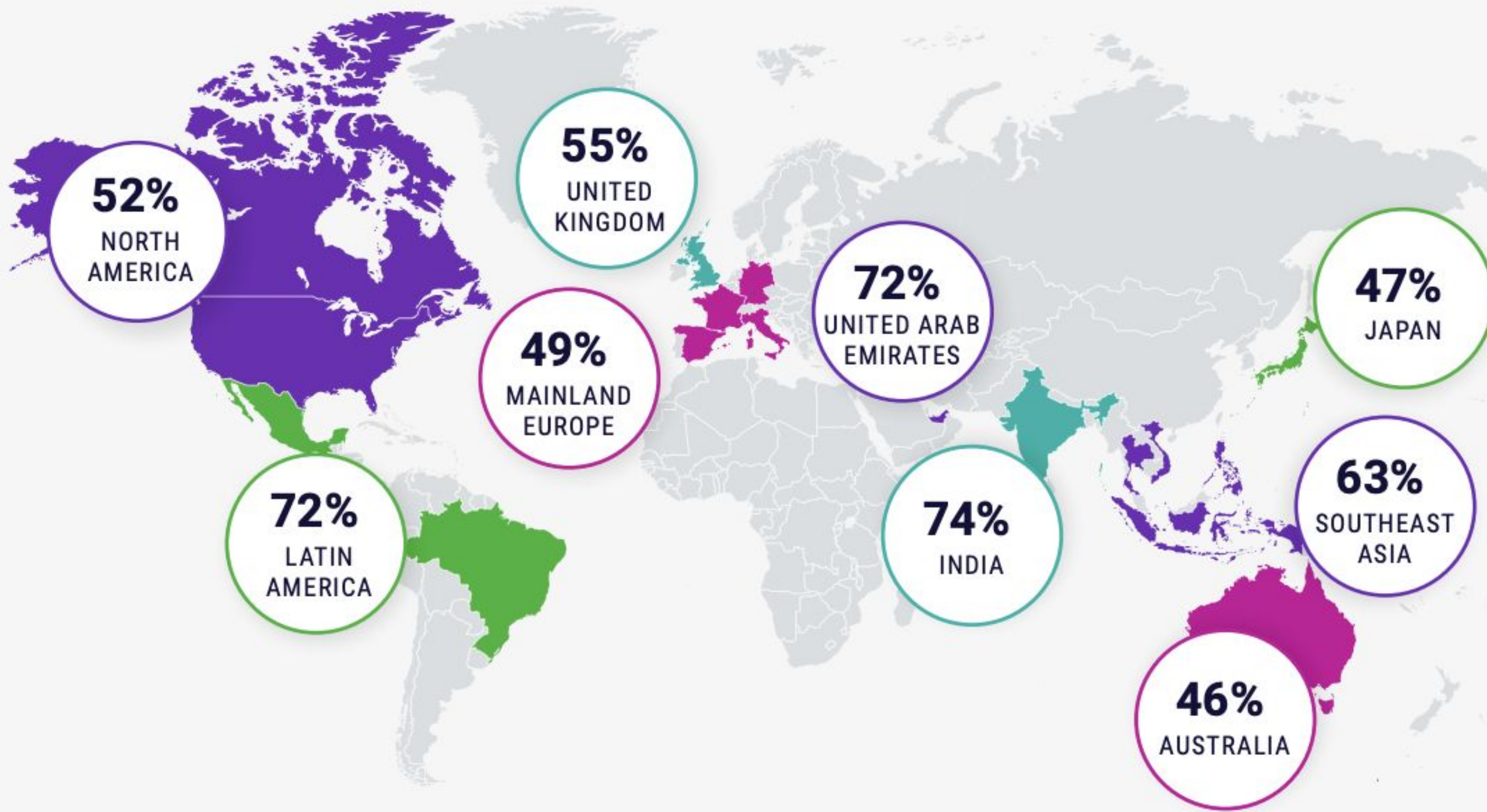
3 The Evolution of Online Shopping Is a New Opportunity For Brands:

Consumers are more likely to shop online today than they did pre-pandemic, and are spending more time researching brands when they do. While competition is fierce, aligning ads with contextually relevant content will enable brands to capitalize on the growing opportunity to secure consumer attention.

4 Consumers Are Holding Brands Accountable; Brand/Values Alignment Is Critical:

Consumers fear that mis- and disinformation is growing, from multiple sources. Beyond calls for governments and platforms to fight back, consumers welcome brands that take a stand. In an era of polarization, brands must align themselves with content which reinforces their brand equity and values. Investing in safety solutions — as well as tools like contextual targeting — will be key to achieving this and unlocking the reward of consumer trust.

Percent of Consumers That Signed up to a New Streaming Service in the Past 12 Months



Conclusiones

Muchas gracias