REWRITING
THE MARKETING PLAYBOOK

How the Marketing and Advertising Industries are being disrupted by Data-Driven Tech, and what brands need to do to stay ahead.

A report prepared by TD Reply

2020

Powered by **SONAR**
DISCOVER WHAT'S NEXT.

REPLY

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Contents

1. WHERE ARE WE NOW?

What has made Marketing and Advertising so successful to date and what topics matter to the industry today.

2. WHAT ARE THE BIG ISSUES IN THE INDUSTRY?

The Marketing Process has been upended.

Consumer-centricity is Key.

Big Tech is consolidating its grip on the Industry.

3. WHAT DOES THE FUTURE NEED TO BE?

What our future forecasts are for helping the Industry thrive from Covid-19 and through the 2020s.

01

WHERE ARE WE NOW?

What has made Marketing and Advertising so successful to date and what topics matter to the industry today.

FOREWORD

In 2020, the **Marketing and Advertising Industry is at a crossroads.** The past 10 years has seen more disruption than the last 100. Led by Technological innovation, the rise in importance of data, and an ever-changing cultural environment, has up ended the traditional pillars of the industry.

The next 10 years will make or break the industry. If the industry does not take the initiative to reclaim its strengths, re-invigorate its connection to consumer culture and re-interpret the application of data it risks becoming irrelevant.

We believe the industry can and should do more to lead again.

In this report we analyse the challenges facing the industry, unpacking the key issues and disruptors, with the overall objective of **providing a path forward for Marketing and Advertising.**

The future is already here.

**Now is the chance for
the Industry to lead again.**

METHODLOGY

+30

Interviews with experts representing the following organizations:

Expert Interviews

+

SONAR

SONAR is our data-as-a-service tool for quantified foresight.
Let real-time data be your innovation guide.
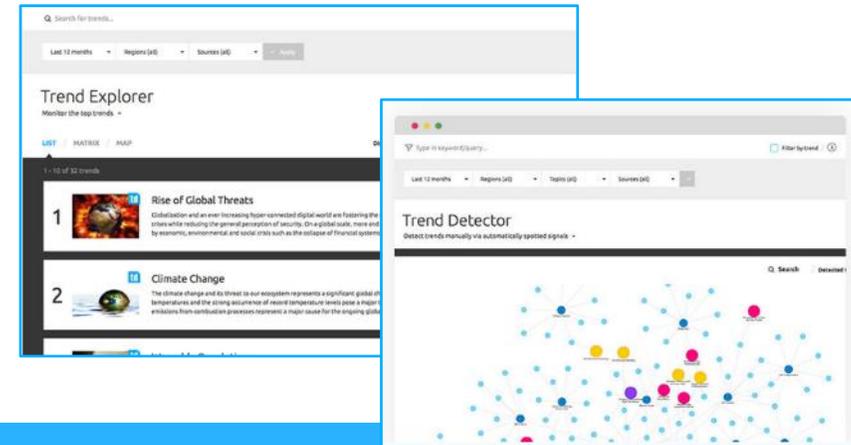
We connected with the smartest minds inside our Reply Network who work day to day with the disruptions inside the Marketing Industry. We also reached out to nearly 30 Marketing and advertisement experts representing leading brands, organizations and agencies to gain a holistic perspective on the wider issues and a forecast of what changes will come faster than others.

To understand where priorities lie across the Marketing Industry, what shifts are happening and where attention is being directed, we used Sonar, our proprietary trend and forecasting tool. Sonar identified expert media interest in Marketing and Advertisement trends by analyzing expert blogs, news sites, patent filings and scientific publications.

THE MARKETING PROCESS HAS BEEN UPENDED

Less time and more choice has diffused the Marketing process.

WE ALL HAVE TO BE CONSUMER-CENTRIC NOW

Staying ahead of consumer culture has never been harder.

BIG TECH IS CONSOLIDATING ITS GRIP ON INDUSTRY

A monopolisation of digital platforms along with digital data is challenging the Industry's clout.

THE SOLUTIONS-
6 steps for brands to stay ahead as data-driven Mar-Tech disrupts the Industry

THE MARKETING PROCESS HAS BEEN UPENDED.

CONSUMER-CENTRICITY IS KEY

BIG TECH IS CONSOLIDATING ITS GRIP ON INDUSTRY.

1

Brands and Marketing departments need new structures that embrace change.

3

The industry needs a new insights framework built on data and focused on actionability.

5

Marketing's relationship with Big Tech needs to change.

2

Agencies need new operating models to balance creativity with agility.

4

An evolution of industry theory to future-proof against uncertainty.

6

Brands need to take a fearless approach to data analysis, exploration and investigation to survive.

An industry built on theory and process, with a shared goal.

An industry built on the original theory of the 4Ps.

P PLACE
P PRICE
P PRODUCT
P PROMOTION
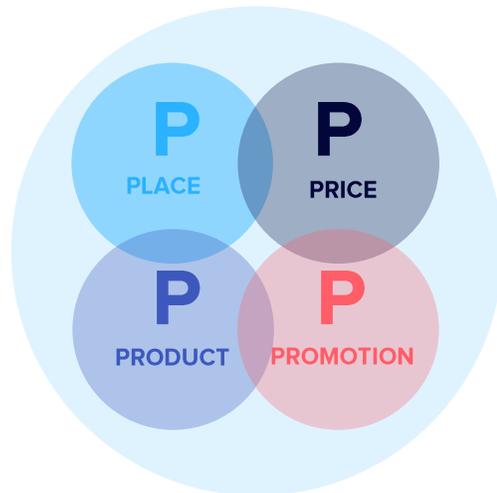
An industry with a clear process.

Consumer & Cultural drivers

Messages: Creative & content

\+

Medium: Platforms & Channels

\+

Metrics: Measurements & Conversions

Brands selling products & services
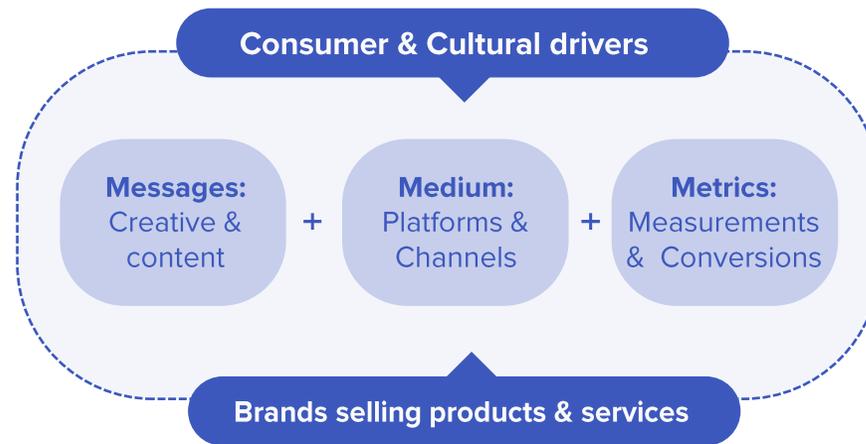
An industry with objectives built for growth and profit.

Brand Positioning

Mental Availability

Physical Availability

Data Engine

8
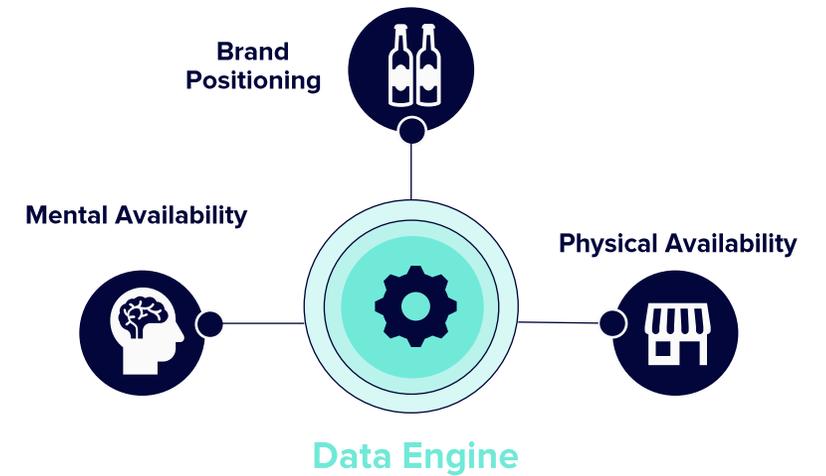
An industry with resilience through the ages- Responsible for producing clout and culture.

A HISTORY OF EVOLUTION

TO TODAY

Golden Age of Advertising	1st Crisis Price Inflation	Consolidation Growth by size	2nd Crises Inflated formats	Consolidation Cut middlemen

Creativity

Few big creative agencies	Many creative agencies	Agency networks	Automation/ Efficiency	P2P Influencers
Mad Man	Digitized Production (Computer Aided)	DDBO, WPP, Publicis	"Websites that do websites"	Kim Kardashian
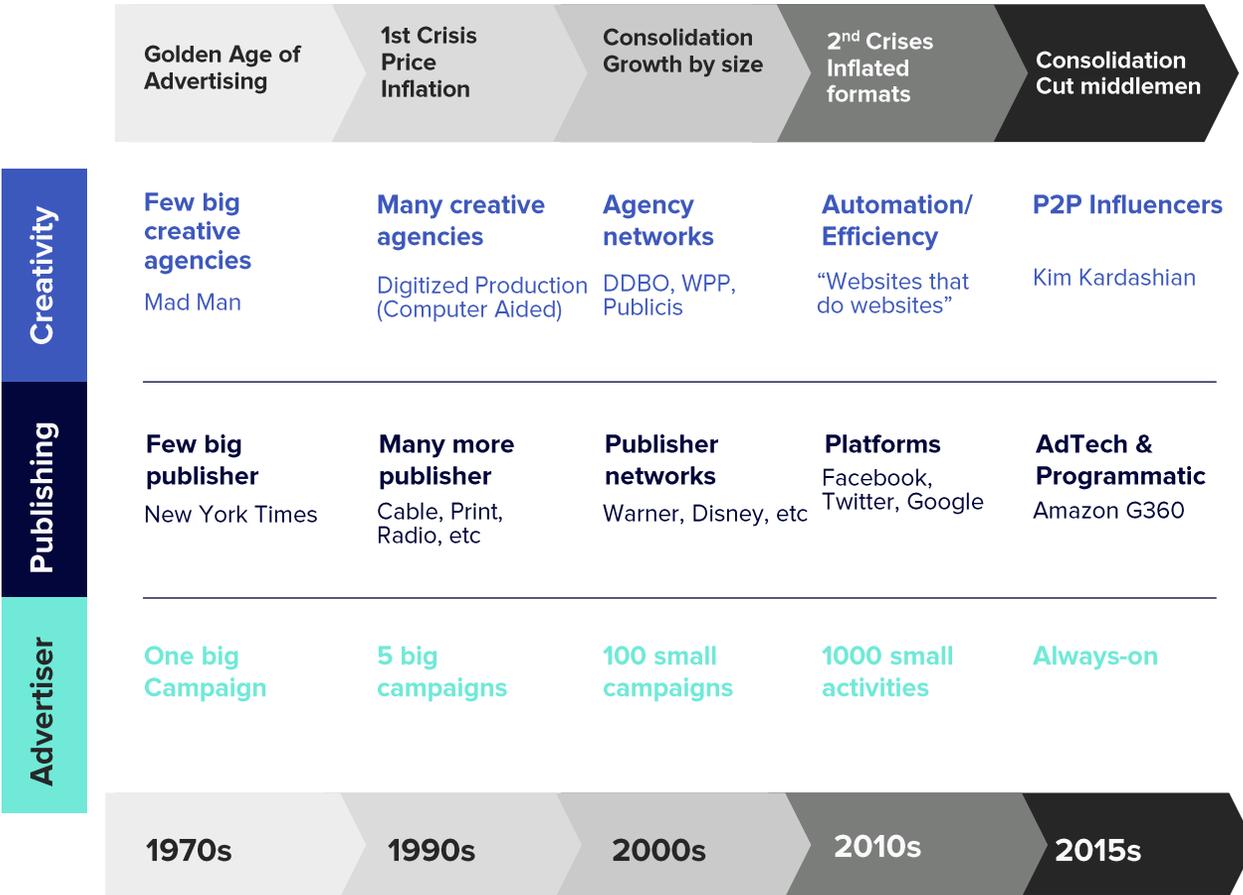
Growing YoY faster than the avg, global GDP.

YoY Total Industry growth %

Publishing

Few big publisher	Many more publisher	Publisher networks	Platforms Facebook, Twitter, Google	AdTech & Programmatic
New York Times	Cable, Print, Radio, etc	Warner, Disney, etc		Amazon G360

Made up of a multitude of agencies and service providers.

Publicis Groupe   Omnicom Group

Advertiser

One big Campaign	5 big campaigns	100 small campaigns	1000 small activities	Always-on

1970s	1990s	2000s	2010s	2015s

Creating cultural defining communications for brands and companies.

For more O in your life. o2 Mobile

FÜR ALLE, DIE DAS ORIGINAL LIEBEN.
The Original Way. Coca-Cola

Technology – tools, services, platforms, products, companies – has dramatically reshaped our world in just the last decade.

100m
Broadband users globally

→

3.1bn
Broadband users globally

300m
Smartphones globally

→

1.6bn
Smartphones globally

1bn

Google searches a year globally

→

3.5bn
Google searches a day globally

2010 → **2020**

Source; Statista
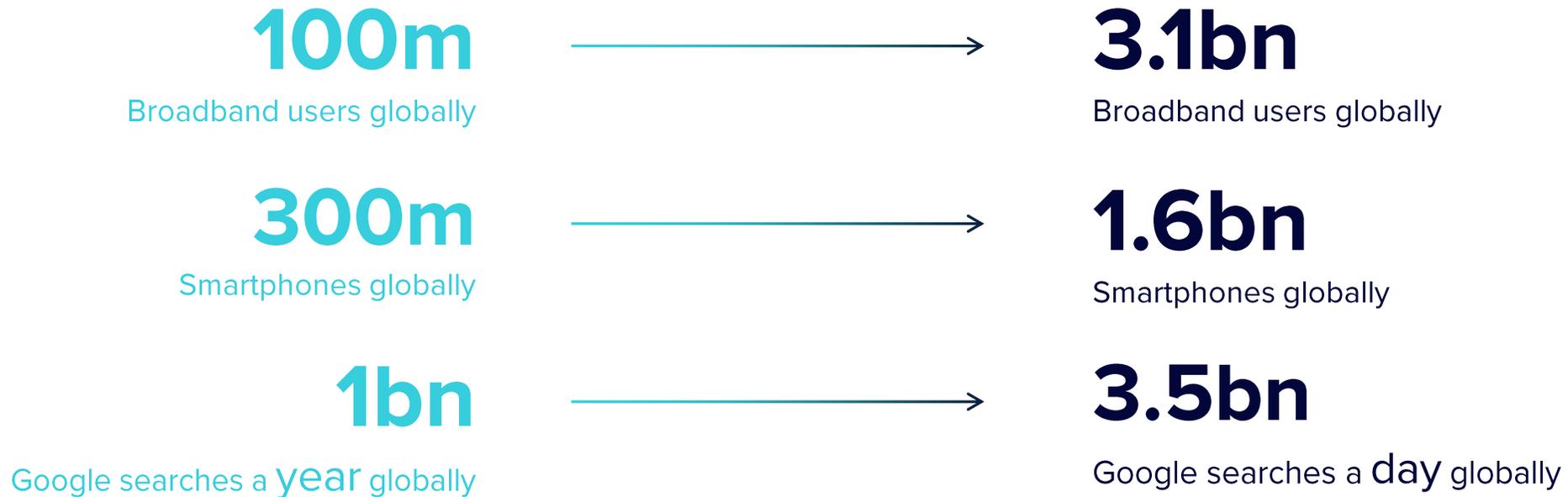
Marketing Trends
Trend Hype-Cycle

By using our SONAR Trend-Platform we are able to create an overview and mapping of relevant trends related to Marketing based on their occurrence within expert media articles, mass media, patents and scientific publications. The arrow implies a typical trend development and life-cycle from a small and growing to a bigger established trend with stagnating growth.

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STAGNATING TRENDS

Trends with an above average number of articles over the last 12 months, but declining or low growth compared to 12 months before.

FLUID & REACTIVE MARKETING

GROWTH EXCELLENCE

CONSUMER & BRAND CENTRICITY

DATA CONSCIOUSNESS

NEXT LEVEL MARTECH

UP & COMING CHANNELS

EARLY TRENDS

Trends with a low number of articles over the last 12 months, and declining or low growth compared to 12 months before.

BOOMING TRENDS

Trends with an above average number of articles over the last 12 months, which is even higher than 12 months before.

UPCOMING TRENDS

Trends with a low number of articles over the last 12 months, but with a high growth compared to 12 months before.

VOLUME

GROWTH

Content Marketing, Brand Experience & CX, Search Advertising, Influencer & Advocacy Marketing, Old School Media Advertising, Email Marketing, Social Media Marketing, Voice & Conversational Advertising, Customer Satisfaction Tracking, Data Privacy & Design, Marketing Privacy-driven Automation, Data-driven Marketing, DAM & MRM, Mobile & Web Analytics, Growth Hacking & Growth Marketing, Immersive Marketing, IoT for Marketing, Participation Marketing, Marketing Data Visualization, Social Media Monitoring, Content Optimization & Testing, Brand Purpose, End-to-end Marketing, AI & ML for Marketing, Visual & Image Recognition in Marketing, Mobile & App Marketing, Podcast & Audio Advertising, Biometric Marketing, User Generated Content, Always-On Marketing, Blockchain for Marketing, Programmatic Advertising, Voice Search & Digital Assistants, Gamified Marketing, Third-party Data, Long-form Content, Supply Side Platforms, Contextual Marketing, Identity Resolution, Visual Search for Marketing, Humanized Brands, Micro-Targeting & -Segmentation, Artificial Creativity, Ad Fraud & Fake Engagement, Account-based Marketing, Speech Analytics, Walled Gardens, Digital Native & DTC Brands, Customer Segmentation, Location-intelligent Marketing, Shoppable Media, Predictive Customer Analytics, Brand Authenticity, Brand Transparency, Low Code & No Code Marketing, Alternative Ad Networks, Conversational Commerce, Ethical Marketing, Marketing Technologists, In-Game Advertising, First Party Data, E-Sports Marketing, Customer Intelligence Platforms, Predictive Analytics & Marketing, Data Management Platforms, Chief Growth Officer, Behavioral Targeting, Demand Side Platforms, Addressable & Programmatic TV, Customer Journey Analytics, Neuromarketing, Multi- & Omni-Channel Marketing, Proximity Marketing, Emotion AI in Marketing, Cookie-based Marketing, Data-driven Content Marketing, Marketing data literacy & culture, Outcome-based Marketing, Marketing Modeling, Real-Time Marketing, Ad Verification, Multitouch Attribution, Data Ethics & Governance, Marketing Analytics, Brand Awareness & Perception Measurement, Digital Brand Equity, Performance Marketing, Loyalty & Retention Marketing, Video & Live-Streaming Ads, Customer Data Platforms & Profiling, Personalized Marketing, Marketing Effectiveness, Ad Blocking, Marketing Efficiency, Data Ownership & Zero Party Data, Emerging Social Media Channels

Insights powered by **SONAR** DISCOVER WHAT'S NEXT.

11

Timeframe: Aug 2019 – July 2020
For comprehensibility values for volume and growth are standardized and normalized (values from 0-100).

The hype cycle shows an industry rapidly evolving.

Across the hype cycle we see new social media platforms and brand measuring growing in importance, whilst main stay topics like search and influencer use dominating the industries headspace.

What has the biggest share of interest.

- Search Advertising
- Influencer & Advocacy Marketing
- Emerging Social Media Channels
- Brand Experience & CX
- Old School Media Advertising
- Content Marketing
- Customer Satisfaction Tracking
- Social Media Marketing
- Voice & Conversational Advertising
- Email Marketing
- Data Ethics & Governance
- Marketing Automation
- Data-driven Marketing
- Mobile & Web Analytics
- DAM & MRM

What is growing the fastest.

- Emerging Social Media Channels
- Digital Brand Equity
- Customer Data Platforms & Profiling
- Low Code & No Code Marketing
- Ad Blocking
- Micro-Targeting & -Segmentation
- Customer Journey Analytics
- Customer Segmentation
- Emotion AI in Marketing
- Loyalty & Retention Marketing
- Data Ownership & Zero Party Data
- Chief Growth Officer
- Predictive Customer Analytics
- Outcome-based Marketing
- Marketing Analytics

02

WHAT ARE THE BIG ISSUES TOPICS THE INDUSTRY?

Marketing technology is disrupting the industry at accelerating speed.

THE MARKETING PROCESS HAS BEEN UPENDED.

Less time and more choice has diffused the Marketing process.

WE ALL HAVE TO BE CONSUMER-CENTRIC NOW

Staying ahead of consumer culture has never been harder.

BIG TECH IS CONSOLIDATING ITS GRIP ON INDUSTRY.

A monopolisation of digital platforms along with digital data is challenging the Industry's clout.

THE MARKETING PROCESS HAS BEEN UPENDED.

For decades, Marketing and Advertising drove culture, bringing new products, ideas and trends to the mass market.

The theory and practice worked. Successful organizations were ones that adhered to the 4Ps theory, which emphasize brand building, creativity and innovation, new consumer solutions and on building share of mind and share of market.

However, Marketing as a process no longer operates as it used to. The past 10 years of tech developments have outpaced the Industry, pushing the Marketing and Advertising Industry firmly onto their back feet.
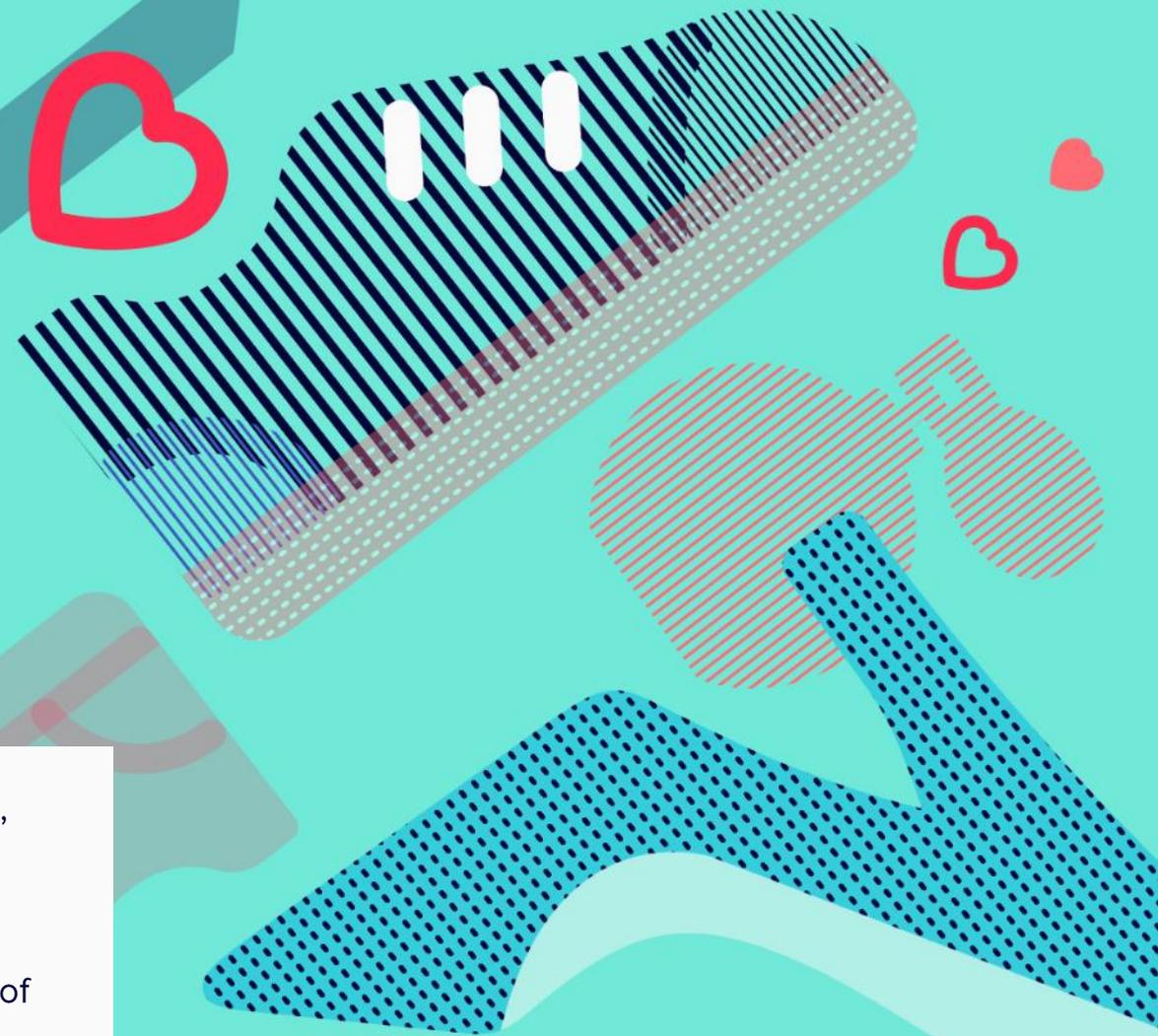
Key impacts of technology in the Marketing process

What has changed in the last 10 years?

INCREASED SPEED

As time barriers to communication reduced, volume increased.

There are
350 Million
tweets posted every minute.

INCREASED CHOICE

The number of voices increased giving rise to UGC and 'Influencers'.

There are more than
31 Million
YouTube channels.

2010

2020

INCREASED VOLUME

All this digital activity produced 'data'

There are
2.5 Quintillion
bytes generated by internet users every day.
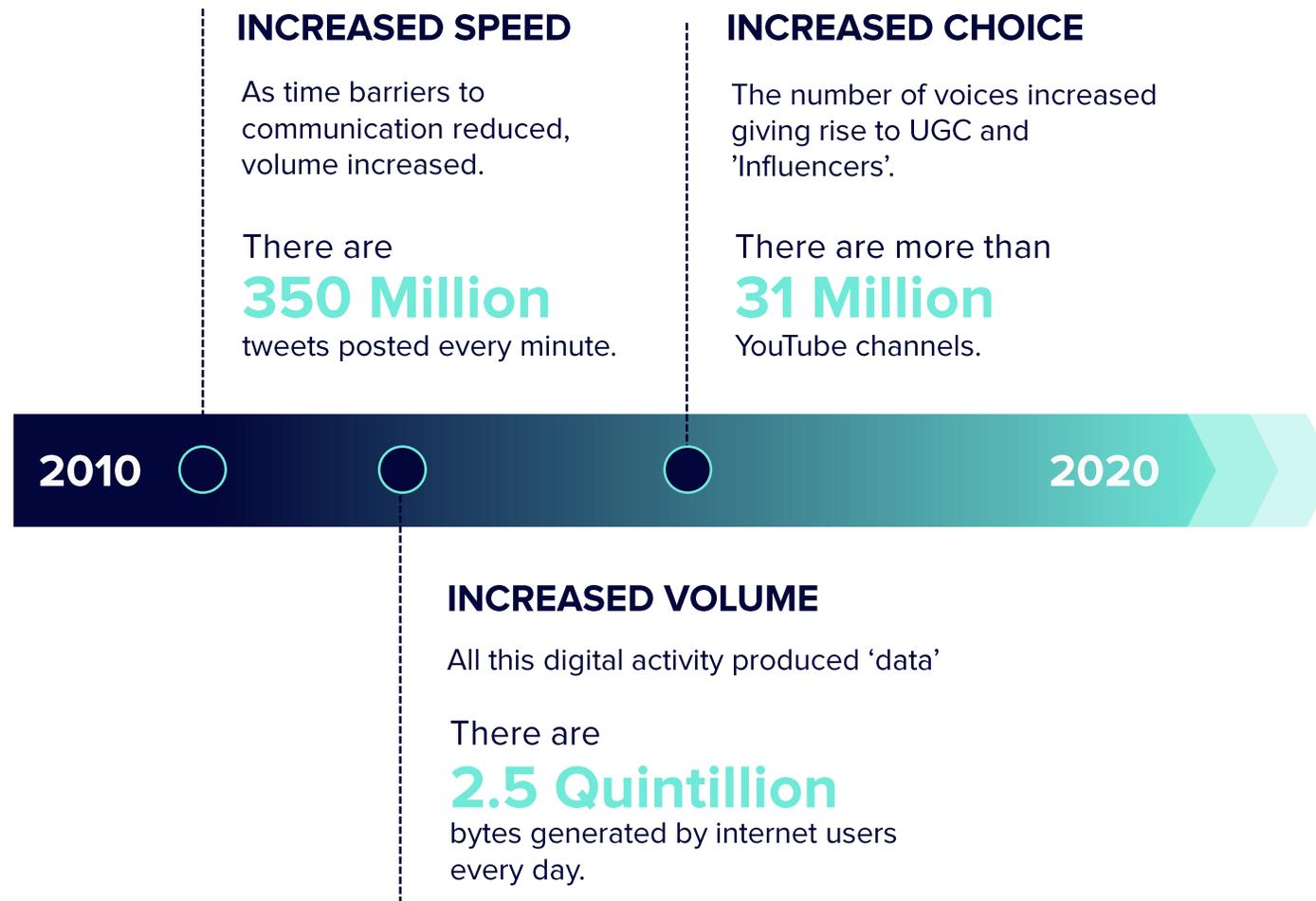
The consequences for the Industry:

Say better faster

It has become harder for brands to be heard in noise, and even harder to keep consumers attention.

Be scrutinised in real time

The ability to track live performance is now a reality.

Business models built on reaction

The Industry, in particular advertisers, are now playing catch up to algorithms.

Where are we today?

WHAT IS THE BIG TREND?

The process of Marketing has been upended.

WHAT ARE the Industry IMPLICATIONS?

1 **Mar-Tech is becoming the Industry norm.**
Mar-Tech has been driving the Marketing Industry – focusing on automation and prioritising efficiency of processes.

2 **Old Agencies are in trouble.**
The need for agencies to act as connector between brands and consumers is being challenged.

3 **Brands trying to keep pace.**
The ability of big organisations and marketers in pivoting to constantly changing circumstances is being strained.

TREND DEEP DIVE:
Mar-tech is already the Industry norm.

The next level of the Marketing game has changed the rules for good
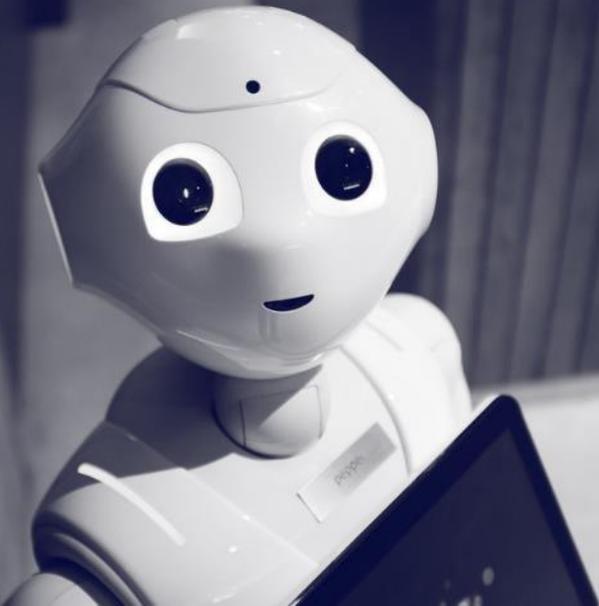
The role of the Marketing process was to take new products and brands to market, making consumers aware and driving purchase intent. But the past decades technological disruptors of speed, choice and knowledge have flipped the process, giving power to consumers and forcing brands to reorganise their brands to focus more on consumer needs – we are now in the age of consumer-centricity.

However, change has come at such a fast pace that the wider industry has struggled to keep up. On the surface Marketing remains the same questions to be answered as before, but underlying mechanics have disrupted the processes and possibilities.

The next level of the Marketing game has changed the rules, adding the complexity of fighting with algorithms and technology on top of understanding the consumer's purchase intent.

Underneath the rise of big tech firms has been a multitude of new tech-first organisations. **On the one hand the industry is being confronted with new thinking, possibility and capabilities but at the same time the industry is also being distracted from its core purpose and function.**

Marketing was a linear process, broadcasting one to many. Mar-Tech has changed that.

The Marketing process was about development, publication and control of a brand message. But the rise of new platforms, of consumer participation, and the pace of culture means the Industry is having to let go of traditional process and pivot towards being in more places, more often, and on the same level as consumers.

FROM →

Clear, thought out, communications broadcast from one brand to many consumers through select channels.
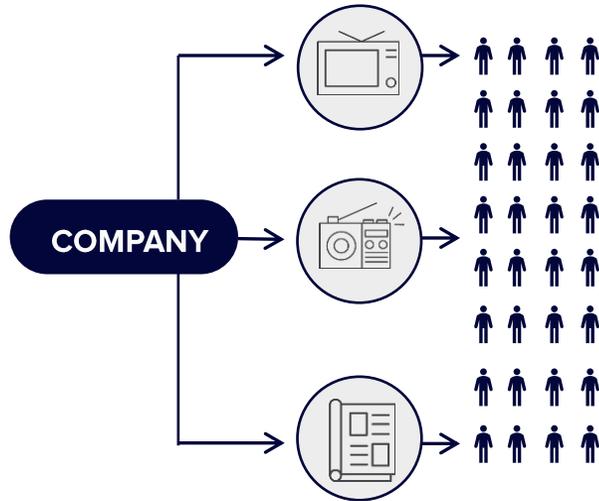
One-to-many transmission of brand narrative.

TO

Constant, always-on management of a brand idea that is shared with the brand and all potential consumers in real time.
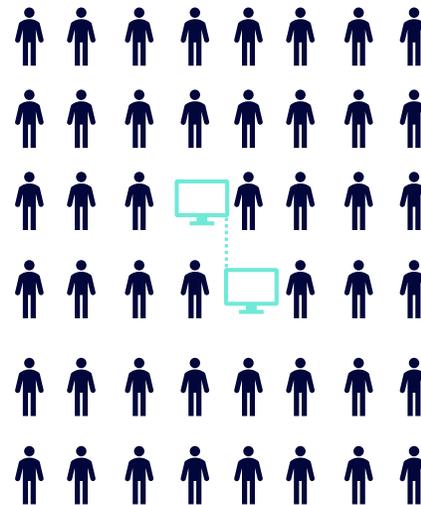
Many-to-many transmission of narrative and sentiment.

" **The challenge is not to come up with good creative but creative that works consistently across platforms.”**

- Johan Houben, Media and Digital Marketing Director MEU, Mondelez

" **I don't believe in agencies offering 360-degree anymore.”**

- Senior Executive, Automotive industry.

The Marketing process now rewards being short term disruptions without long term consistency.

The Industry still relies on big campaigns to disrupt and capture attention. However as new platforms, technology and methods of consumer interaction flourished, the Industry became obsessed with virality – the instant PR success of stunts and one off messages.

New models of operation requires new managers of process- creating implications for both agencies and big organisations that make up the Marketing and Advertising Industries.

" **In a world where it is increasingly difficult to capture consumers' attention and engage with them in meaningful ways, UGC fits the bill on organic, engaging and non-intrusive Marketing executions.**
IAB, 2019

"MARKETING IS NOT ABOUT IDEAS BUT ABOUT PROCESS"

- Emidio Mansi, Commercial Director, Pasta Garofalo

TREND DEEP DIVE:
Can brands keep pace?

Despite their age, the 4Ps of Marketing have been highly effective in helping organise the roles, objectives and structures of big company Marketing departments.

Over time the industries biggest players could sustain growth through a combination of the 4Ps: namely innovative creativity with a stream of exciting new products at competitive prices and the best distribution in the category.

However, this process is coming undone. **New brand and product up-starts with Marketing models that are agile, lean and better-integrated are winning new business and market share.** Incumbent brands and organizations are losing out.

The new ecosystem of Marketing is forcing brands to pivot in focus, recruit new skill sets, internalise external competences and adopt to technological innovation faster than ever before.

Mar-Tech has been the top priority for the Industry as it races to embrace new opportunities

As the possibilities for Data-Driven Marketing grow exponentially, so have the purchasing and implementation of these technologies, creating increased demand for data analytic skillsets in the Industry.

" **Marketing Technology is the single largest area of investment when it comes to Marketing resources and programs."**
Gartner 2018

Figure 4. Marketing Budget Allocations Across Major Resources

Legend: 2017, 2018, 2019

	Agency	Martech	Media	Labor
2017	25%	22%	25%	27%
2018	23%	29%	23%	24%
2019	22%	26%	26%	25%

n = 328 N. America/UK Respondents (2019); n = 605 (2018); n = 345 (2017)
Source: Gartner 2019-2020 CMO Spend Survey
Q. How is your company's fiscal year 2019 total marketing expense budget being allocated to or spent on major resource categories?
Percentages may not add to 100% due to rounding
ID: 407836

1/3
CMO budget allocated to Mar-Tech in 2019 (Gartner 2018)

60%
plan to increase Mar-Tech spending in the next 12 months. (NewsCred 2020)

What are the most desired skills for your digital Marketing hires in 2019-2020?

Skill	%
Data analysis	41%
Marketing automation/ software expertise	38%
UX design	36%
Video production and editing	31%
Coding/development	29%
Content editing and writing	29%
Graphic design	28%
Program/project management	28%
Social media listening & publishing	26%
SEO/SEM expertise	8%
Paid media/programmatic advertising	6%
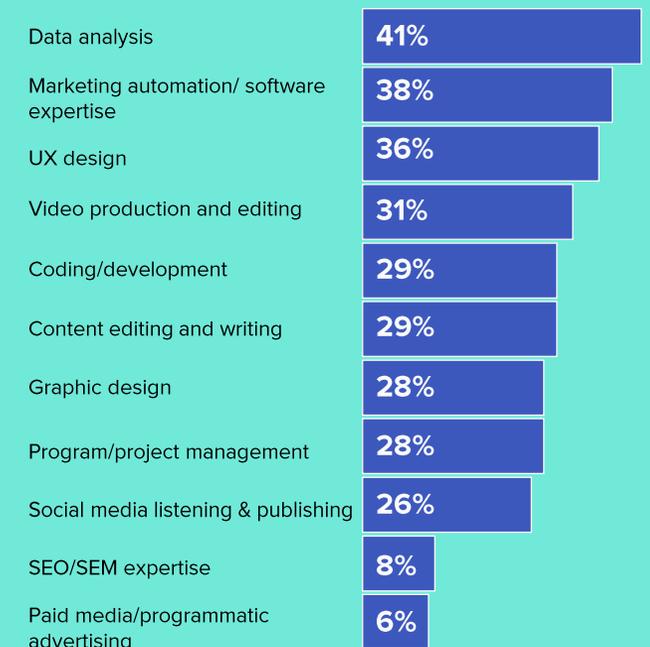
(Altimeter Digital Marketing Survey 2019)

Mar-Tech is re-defining the role Marketing and Advertising plays within organisations and across the agency eco-system

The Marketing and Advertising Industry has traditionally operated successfully between the spaces of creativity and business strategy.

But as the Industry evolved with tech and digital Marketing expanding their remit, Industry agencies have started losing top talent to tech giants.

Creative executives have been leaving their agencies to join the big tech companies in-house creative teams within Google, Facebook, Apple and the like for years.

83%

of global CEOs see Marketing as owning the growth agenda
(McKinsey & Company, 2019)

Global Marketing giants have been tinkering with the CMO role, with new C-level titles from chief experience to chief growth are emerging to take their place.

Traditionally, the CMO role was to act as the voice of the customer in the board room, however new roles put the focus of Marketing in driving growth and repositioning its functional relevance and visibility in the C-suite.

MARTECH ADVISOR
Today's CMOs Must Be Technologists
03/2019

Forbes
The Chief Growth Officer: The Evolution Of The Marketing Head
09/2019

WARC
Why the CMO's future role is 'growth partner', not marketer
04/2020

Brands are shortcutting the agency process with in-housing and hybrid agency models

Complexity and gaps in capability, knowledge and capacity is increasingly turning brands towards a hybrid model blending internal and external resources to successfully leverage expertise of highly-specified tech talent.

Product R&D

Customer and Brand data

Marketing + Sales

Web & Logistics
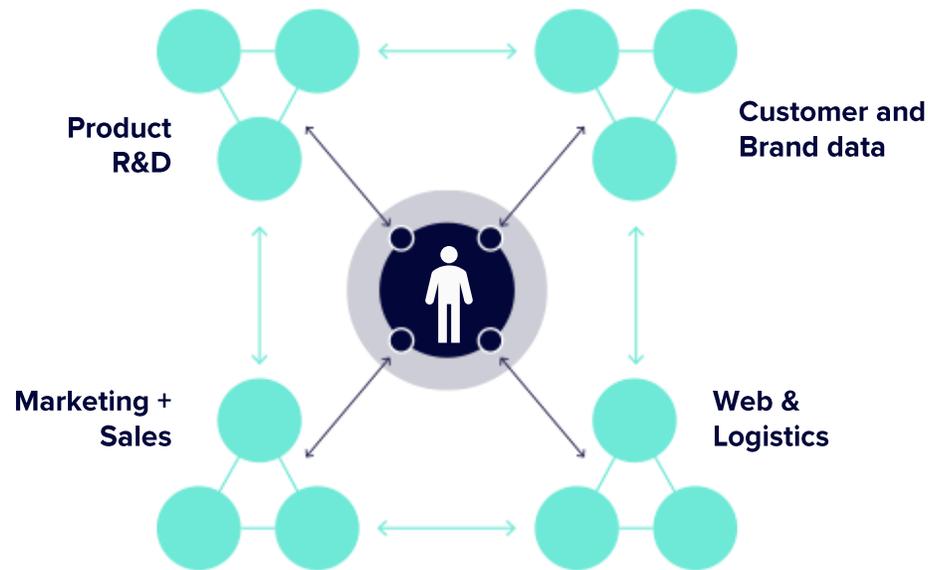
91%
of brand decision makers have, or are in the process of moving part, or all, of their Marketing in-house
(Search engine journal, 2019)

50%
of in-house agencies increased workload within last year
(Association of National Advertisers 2018)

78%
of companies have an in-house agency in 2018 compared to 58% in 2013.
(ANA, 2018)

Unilever's U-Studio delivers quicker for less

The company's recent **annual report** noted that 17 U-Studios in 12 countries "are now creating content for brand teams faster and around 30% cheaper than external agencies".

Procter & Gamble saves $750 million on advertising and cuts agencies by 50 percent

PUBLISHED WED, JAN 24 2018·9:54 AM EST | UPDATED WED, JAN 24 2018·11:39 AM EST

AI is moving towards artificial creativity- closing the gap between data and design.

A new layer of complexity is added to the creative space as marketers are increasingly torn between creative storytelling as well as creative tech play to run successful campaigns reaching customers at the right time and place.

The task for the Industry is to make new technologies a process teammate, **augment *(but not replace)* human capacities to execute powerful marketing ideas in a data-driven and increasingly personalized ways.**

Effectively bringing Marketing creativity to an automated scale not seen in the Industry before.

In 2018, marketers
reported they only use

61%

of the functionality in their
Mar-Tech portfolio
(2018-2019 Gartner CMO Spend Survey)

" AI is already helping produce content for local markets"
- Alessandro De Stasi, GVC Group

97%

of campaigns don't
have a unique creative
for each targeting
segment
-AppNexus

30%

of programmatic is invested in
targeting, but advertisers have not
delivered on the promise of right
message to the right audience
-AppNexus

The next chapter of Marketing

Mastering the upcoming decade of Marketing will be dominated by securing access to a new breed of talent and competencies, agile structures, culture, and custom content production at scale and the steering of the complex ecosystem. As traditional competences of agencies will be marginalized by technology and automation, focus of competences needed by advertisers' future agencies will see a seismic shift.

	HYBRID & IN-HOUSING	DIRECT-TO-MARKETER	FAST BEFORE PERFECT	EFFICIENCY KILLING CREATIVE	C-SUITE GROWTH MARKETING
YESTERDAY	Traditional external creative agencies with linear production of large content pieces	Traditional agencies being an entity on their own	Linear, slow and expensive content production of a few pieces and one-off campaigns	All pre-defined big brand launches	Operational function and cost-center, focus on creative steering and brand management
TODAY	In-housing, internal knowledge and skill building as well as hybrid networks of expertise	Independent agency services disappearing and being absorbed by big tech houses	Agile working for custom content and experience creation at scale	Continuous management of real-time triggered Marketing and Advertising	CMO roles delivering multi-disciplinary functions covering brand, product, service sales, marketing and internal talent.

The task for Marketing agencies and ORGS in the 2020s: Be fluid.

1 CHERISH TALENT. NO MATTER WHERE.

Secure access to talent and expertise.

- Access to new talent
- New ways of collaborating
- Hybrid talent & partnership models
- Develop new expertise

2 INVEST IN KNOWLEDGE INSTEAD OF BUYING IT.

Master the everchanging environment of channels and tools.

- Strategic skills mapping & talent planning
- Targeted data & tool literacy and education trainings programs
- Access to tool infrastructure and self-service platforms
- Establish continuous upskilling culture
- Launch educational initiatives that span your company

3 MARKETING MATTERS. EVEN MORE.

Turn Marketing into rocket science and an engine of growth.

- Marketing role up the ladder
- CMO to Chief Growth Officer
- Marketing spanning PR, customer service, product etc..
- Marketing as a cross disciplinary function and mindset
- Support non-traditional careers

4 BE READY FOR HUMAN MACHINE INTERACTION.

Leverage AI to enable human talent / Blend AI and human talent.

- Leverage cost savings for repetitive and small creation tasks
- AI tools for content creation and data-driven storytelling
- Structured creative processes supported by creative co-bots
- More time for the real creative thought

"WHEN YOU TAKE ACTIONS BASED ON ANALYTICS AND KPIS, YOU MOVE MARKETING ON A LEVEL OF A PROFESSION. YOU CAN TALK EYE TO EYE WITH AN ENGINEER"

- Bernd Körber, Senior Vice President, Mini

INSPIRATION ON A PAGE:

Reinvention of Marketing within organizational boundaries

With tech being a critical competency within future Marketing functions, organizations will have to restructure to leverage the full potential and stay competitive. Furthermore, Marketing is ready to prove its relevance and impact on driving growth by leveraging the tech and data in a meaningful way.

TECH AS COMMODITY OR GATEKEEPER.

Technology will increasingly turn into a commodity, accelerating speed and turning into a clear competitive advantage for companies prepared to work with the digital tools' potential – in terms of efficiency, cost cutting and reaching a higher share of mind with relevant customers. In the future, the best and most creative ideas will not reach share of mind, if not implemented by using and understanding technologies potential.

Japanese tech company DataGrid that uses generative adversarial networks to create realistic images of fake fashion models.

PlayPlay is democratizing high quality video content creation for marketing and social media teams, producing high quality video content in minutes.

TOOL INFRASTRUCTURE

TECH STACK INTEGRATION & PLATFORMS

MARKETING TECHNOLOGISTS

REACTIVE & AGILE STRUCTURES

REAL-TIME TRIGGERED MARKETING MANAGEMENT

SMALL BRAND & MARTECH UPSTARTS.

A new generation of small, agile and digital brands and services is shaking up the marketing landscape. Digital native brands born online are connecting directly with consumers by using online-first, hyper targeted, and micro-influencer strategies, challenging the old ways of doing business, rethinking product and retail model. Tech startups provide easy access to services suited for small Marketing budgets at first hand.
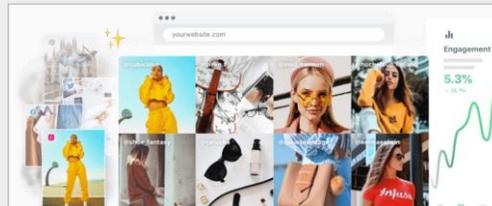
Flowbox helps working with user generated content from social media, providing customers access to a comprehensive stream of user-generated content.
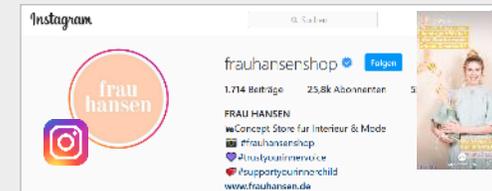
Instead of investing heavily in e-commerce platforms, small businesses like Frauhansenshop leverage Instagram and Stories to provide a profound, authentic and user-centered sales experience.

AGILE ORGANIZATION STRUCTURE & CULTURE

DIGITAL FIRST & DIGITAL NATIVE STRATEGIES

OWNING & UNDERSTANDING OF NEW CHANNELS, FORMATS & MECHANICS

LEVERAGING NEW MARTECH TOOLS

MARKETING AS GROWTH ENGINE.

As the digitalization has transformed marketing practice and expectations of marketing executives from being merely focused on brand building towards managing communication, customer experience as well as data operations, marketing is gaining visibility in the boardroom as a more strategically relevant resource to steer company growth.

Consumer brands like McDonald's, Uber and Johnson & Johnson lately abandoned the role and title of chief marketing officers.

83%
of global CEOs see marketing as owning the growth agenda
(McKinsey & Company, 2019)

MARKETING ROLE UP THE LADDER

CHIEF GROWTH OFFICER

MARKETING INCORPORATING PR, CUSTOMER SERVICE, ETC.

DATA-DRIVEN MARKETING & EFFECTIVENESS KPIS

INSPIRATION ON A PAGE
The future of effective & brand safe advertising

Technology is more and more infusing marketing processes enhancing and automating processes and promising agility at large scale. Marketers have increased tech investments within the last years to equip themselves with the tools needed to leverage the possibilities promised by technology. However, the process is still ongoing and Mar-Tech has by far not reached every corner of the Industry as well as lived up to its promises for each and every business. While technological evolution is making its sprints, organizations remain struggling with staying up to date with tools and leverage them properly.

DEMOCRATIZING AI.

The impact of public cloud services on Marketing Technology has given way to access to **world class intelligent services** and **computing power** AI is on its way to become a universal part of future marketing work. With tools getting more sophisticated, automated and intelligent, replacing repetitive human tasks, freeing up time and changing the way of interaction with all forms of web and media. Moreover, **explainable AI** helps transferring AI from being a blackbox making decisions not easy to verify and understand towards explaining the reasons for certain suggestions.

The startup Aiden.ai is building the first AI-powered marketing analyst to help marketers to make better decisions and lift the burden of analyzing data from marketers.

Adext AI uses artificial intelligence to improve Facebook and Google ad conversions on a cross-channel level, testing up tp 20 audiences per ad to find the best performing once.

TECH INTEGRATION AND IMPLEMENTATION

AI CLOUD MARKETING SERVICES

EXPLAINABLE AI

MARKETING TECHNOLOGISTS

COLLABORATIVE AI

TECH MONITORING & QA

DO IT YOUR WAY.

Increasingly technology and AI is turning from being a science on their own dependent on technical or data science expertise towards giving non-technical marketers **easy and inclusive access** to build their own tools and apps, analyze data sets, and route data between different cloud services on their own behalf. A new breed of **self-service, low or no code tools** has the potential to demonstrate their relevance on the Marketing and Advertising industry.

Makezu's AI technology is capable of understanding and identifying in public Twitter posts if users are expressing concerns or key life moments.

Unstack delivers an automatic, easy, unified marketing platform that instantly works without developers or designers.

LOW/NO CODE TOOLS & PLATFORMS

SELF-SERVICE PARADIGM

CLOUD NATIVE DESIGN

AI-ENABLED CREATIVE

AI is transforming the **content generation landscape**, enabling AI-powered copywriting as well as production and selection of **visual or audio content,** allowing brands to generate and personalize their storytelling and content in a budget-friendly and efficient way. **Generative Adversarial Networks** (GANs) are applied to create hyper-realistic visual content, like videos, photos, and 3D-models.

Phrasee is a digital tool that employs AI to generate marketing language, writing subject lines, Facebook ads and campaigns, messages that outperforms humans.
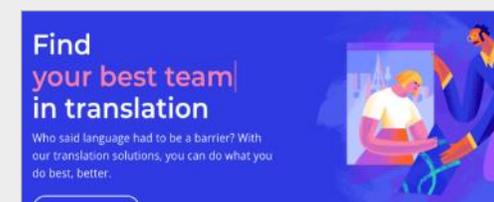
Unbabel offers an AI-powered language translation platform for businesses to easily build multilingual communication with customers neglecting language barriers.

AI-BASED CONTENT PRODUCTION (TEXT, AUDIO, MUSIC, IMAGES) & SELECTION

AI BASED TESTING

AI DESIGN

REAL-TIME TRANSLATION & ADAPTION

PERSONALIZED CONTENT

Marketing technology is disrupting the industry at accelerating speed.

THE MARKETING PROCESS HAS BEEN UPENDED.

Less time and more choice has diffused the Marketing process.

WE ALL HAVE TO BE CONSUMER-CENTRIC NOW

Staying ahead of consumer culture has never been harder.

BIG TECH IS CONSOLIDATING ITS GRIP ON INDUSTRY.

A monopolisation of digital platforms along with digital data is challenging the Industry's clout.

WE ALL HAVE TO BE CONSUMER-CENTRIC NOW

The influx of Marketing Technology proliferating the daily (digital) lives of consumers has created new dimensions of layered complexity in the Industry- with increased choices and channels, and compounded by the increasing speed of interactions.

Brands seeking to find ways to fit in seamlessly and authentically into increasingly segmented consumer personalities, lifestyles, and values are finding it not only hard to keep up, but stay ahead of emerging consumer culture.

Failure to recognize the shift towards consumer-centricity in the context of data-driven Mar-Tech will inevitably put brands behind.

Key impacts of technology in the Marketing process

What has changed in the last 10 years?

INCREASED SPEED

The pace of culture has increased and become globalised.

there are

+100

Fashion weeks per year

INCREASED DATA

Understanding consumers better became possible with data.

75.000

Individual data points collected by private companies about the average American consumer.

2010 ——○———○————○—————— **2020** ▶▶

INCREASED CHOICE

Power of control shifted from publishers and platforms to consumers.

$335 Billion

Estimated revenue of on-demand services of 2025
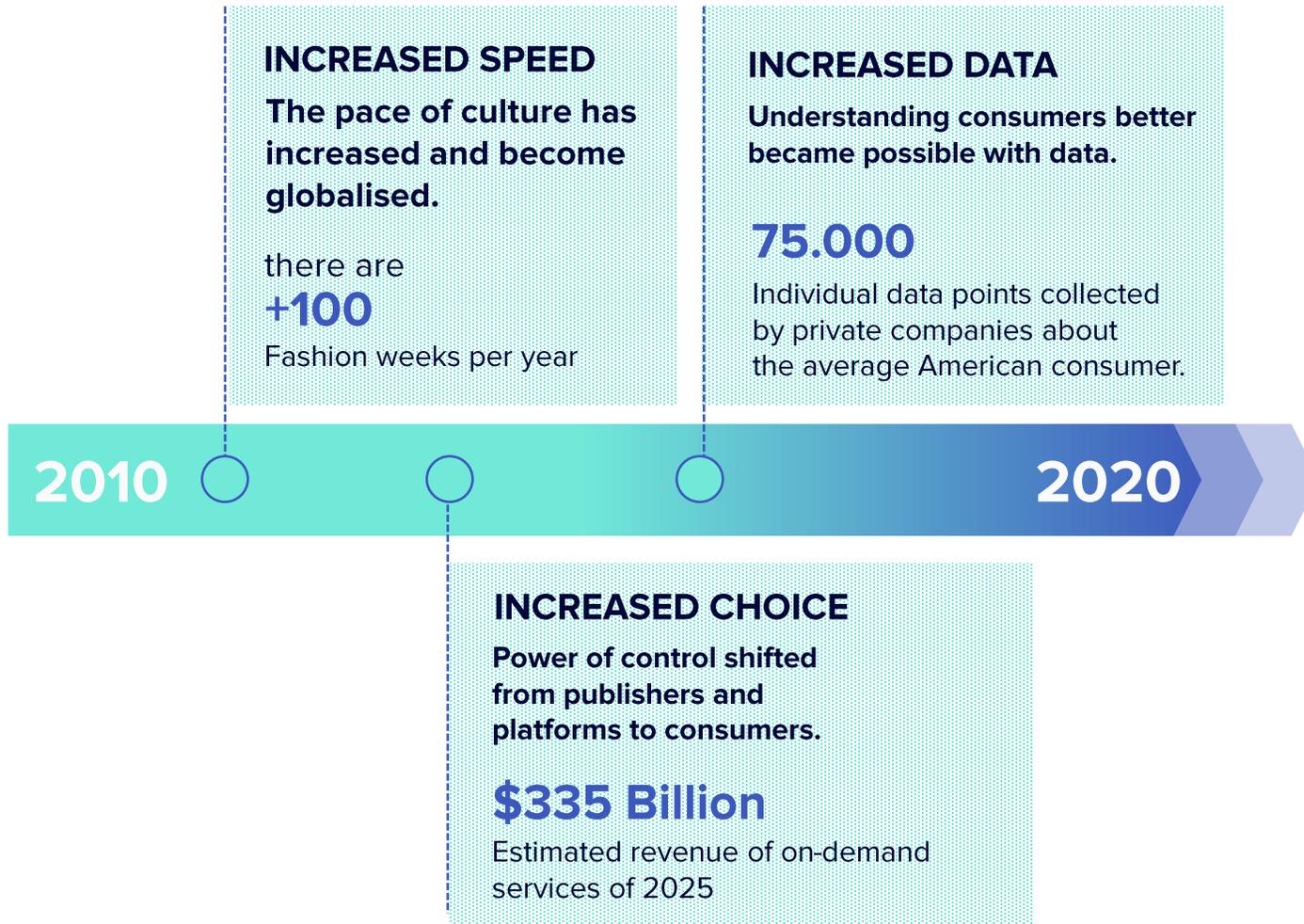
The consequences for the Industry:

The consumer is at the centre

Keeping up with and meeting new consumer demands became the key objective.

New methods need to be integrated - fast

Traditional consumer research methods failed to keep pace.

Be in all the right places

The focus became about choosing the best, most up to date channels, platforms and partners.

Where are we today?

WHAT IS THE BIG TREND?

Brands have had to transition and put the consumer at the centre

WHAT ARE THE INDUSTRY IMPLICATIONS?

1

New technologies will change the concept of Customer Experience and of the Industry itself

Mar-Tech and emerging technologies are on the verge of revolutionizing the customer experience (CX), changing expectations along all Marketing and engagement verticals.

2

To stand out means to remain authentic

The speed, complexity, and noise generated around emerging consumer culture is **exposing brands that are desperately trying to catch up**, while rewarding brands who are able to adapt and yet remain authentic to their core value propositions.

"BRAND IS NOTHING ELSE THAN CONSUMER-CENTRICITY"

- Senior Manager, Automotive Industry

Marketing used to focus on bringing the best product to market. But the focus has shifted.

FROM
R&D to product development, to Marketing to sales to analysis of results.

TO
Identifying a consumer need and then developing R&D solutions to market to consumers, with a test and learn approach from start to end.

Leading brands are already putting consumers at the centre of their operations. Even if the mission is a short term one...
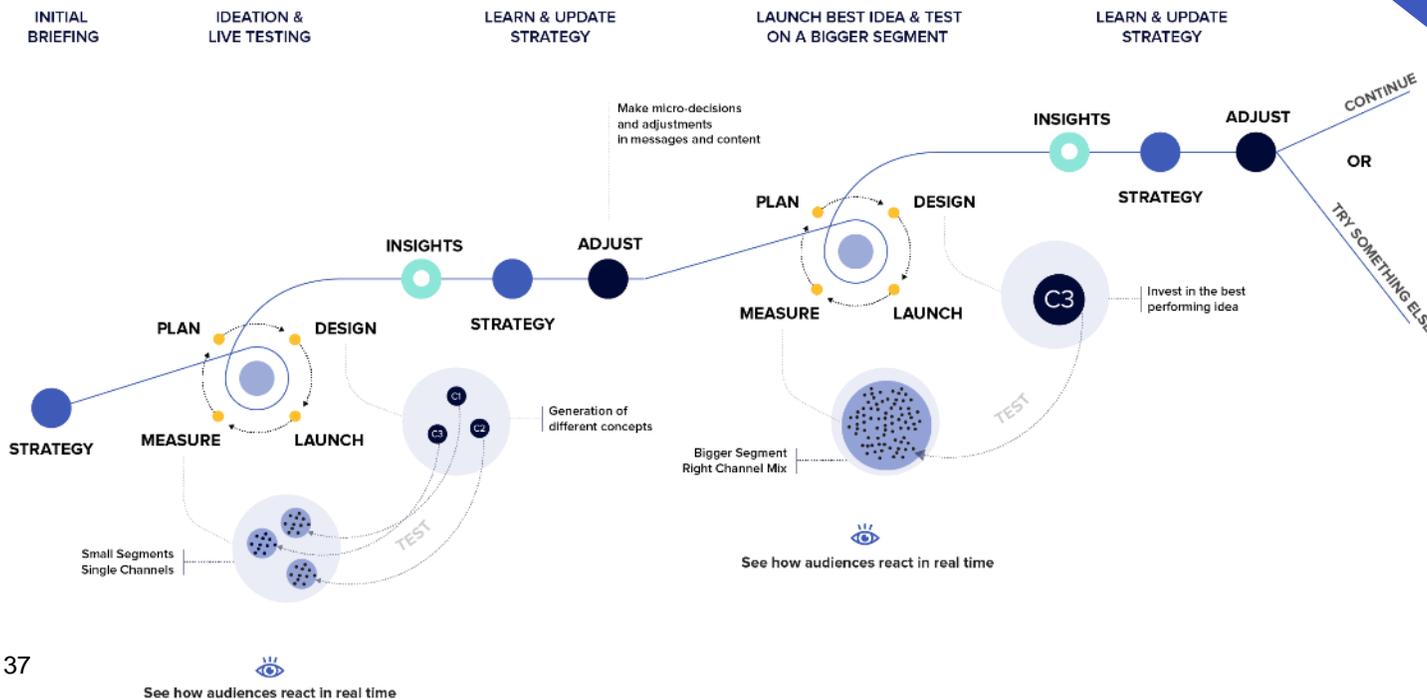
" **Our mission is to be Earth's most customer-centric company. This is what unites Amazonians across teams and geographies as we are all striving to delight our customers and make their lives easier, one innovative product, service, and idea at a time.**
Amazon Mission Statement, 2020

INITIAL BRIEFING

IDEATION & LIVE TESTING

LEARN & UPDATE STRATEGY

Make micro-decisions and adjustments in messages and content

LAUNCH BEST IDEA & TEST ON A BIGGER SEGMENT

LEARN & UPDATE STRATEGY

CONTINUE

OR

TRY SOMETHING ELSE

INSIGHTS   ADJUST
STRATEGY

INSIGHTS   ADJUST
STRATEGY

PLAN   DESIGN

MEASURE   LAUNCH

Invest in the best performing idea

PLAN   DESIGN

MEASURE   LAUNCH

C3

Generation of different concepts

STRATEGY   MEASURE   LAUNCH

C1
C3   C2

TEST

Bigger Segment Right Channel Mix

TEST

See how audiences react in real time

Small Segments Single Channels

See how audiences react in real time

37

TREND DEEP DIVE:
How to understand consumers today?

It is important for brands to have value in consumers lives

Customer and consumer experiences is in the midst of a transformative change, enabled by technology, as tech has created more conversion moments and turned every touchpoint into an impulse buying opportunity.

Tech-led possibilities will push the Industry further: AI can already predict consumer personality profiles by tracking eyes. It is becoming "self-aware" and increasingly ready to take a more prominent role in traditional creative tasks (while not replacing human instinct and ingenuity).

Emerging technologies like AI, VR, AR, biometrics are providing a glimpse of the future, but with mixed results today – with few yet to establish real innovation across markets.

However with the advent of technology, the pace of consumer culture has sped up, as has the ability to research and understand the consumer.

The new research models will improve consumer-centricity but it will take new skill sets in the Industry to get there.

Mar-Tech has enabled a growth of consumer touchpoints

In their hunt for customer's attention and the ultimate seamless customer experience, technology capability has focused on commercializing digital channels. Consumers are lured into purchases from social networks, inspirational content and entertainment as every touchpoint is converted into an impulse buying opportunity with a click.

Google adding a universal shopping cart to its search capability

Google Now Lets You Shop From Search Results
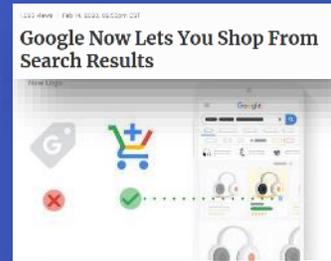
"Increasingly seamless transition from awareness to purchase can happen within a click today, you have to understand the commercial side of things in order to be successful as a marketer."
Johan Houben, Media & Digital Marketing Director MEU, Mondelez

EVOLUTION OF DIGITAL MEDIA COMMERCIALIZATION

Google adds voice activated shopping, taking on Amazon
02/2017

Instagram adds shopping tags directly into stories
06/2018

Google Lens comes to Google Images for shopping inside photos
10/2018

Instagram adds in-app check-out as part of its big push into shopping
03/2019

Snap a photo of a menu and Google Lens can tell you what to order
05/2019

TikTok tests social commerce
11/2019

TikTok adds "shop now" button
05/2020

Facebook and Instagram roll out shops, turning business profiles into storefronts
05/2020

Pinterest adds a 'Shop' tab to its Lens Camera search results
06/2020

Increased channels exposes a multiplicity of consumer personalities

The myriad of consumer data captured instantly through various means - from e.g. image to location, IoT sensors, speech and behavioral recognition, combined with smart algorithms and capabilities - is lifting consumer understanding in terms of depth and speed.

The result is that consumers are constantly-iterating layered, intersectional identities. Brands wanting to engage will need to learn new ways to stay ahead of culture, touchpoints, competitors and automation.

Innovation in this context is staying agile and authentic while adapting to emerging consumer culture.

> **Social media analytics can produce data in hours or days, as opposed to months for conventional research methods. In addition, consumer research through social media can be more accurate than conventional market research because consumers are less disposed to social desirability bias and mistaken recall."**
> **William Comcowich, gelan.info**
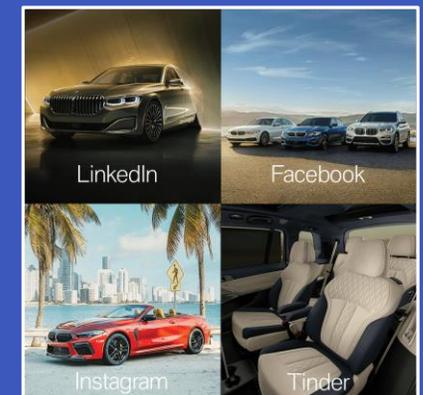
The Dolly Parton Challenge exposed how consumers maintain multiple identities for different contexts.

Brands like BMW seeking to humanize their approaches to connecting with consumers have adapted similarly, while staying true to its core value propositions.

"WE WANT TO GIVE PEOPLE REASONS TO LOVE BMW, INTERACTION WITH THE CUSTOMER IS KEY."

- Stefan Ponikva, Vice President Brand Experience BMW

TREND DEEP DIVE:
How purposeful is brand purpose?

It is important for brands to have value in consumers lives

The advent of consumer-centricity has led to the focus on brand purpose- for a brand to communicate what it stands for, why, and how it fits into consumers lives and culture.

Brands wanting to engage will need to learn new ways to authentically relate to their consumers via multiple touch points. Whether that is through providing entertainment, reprise, hope, purpose, or anything else, brands are being forced to reevaluate their value-add across various fractured contexts.

Purpose has been led by consumers who have been given more purchase choices, more access to brands and more product knowledge, all within a culture that demands they move faster to stay on top of trends.

But the success of brands in having and communicating a 'purpose' has been mixed. **It is important for brands to have value in consumers lives, but a poorly-executed purpose agenda, and/or inauthentic value propositions, can do more harm than good for a brands reputation.**
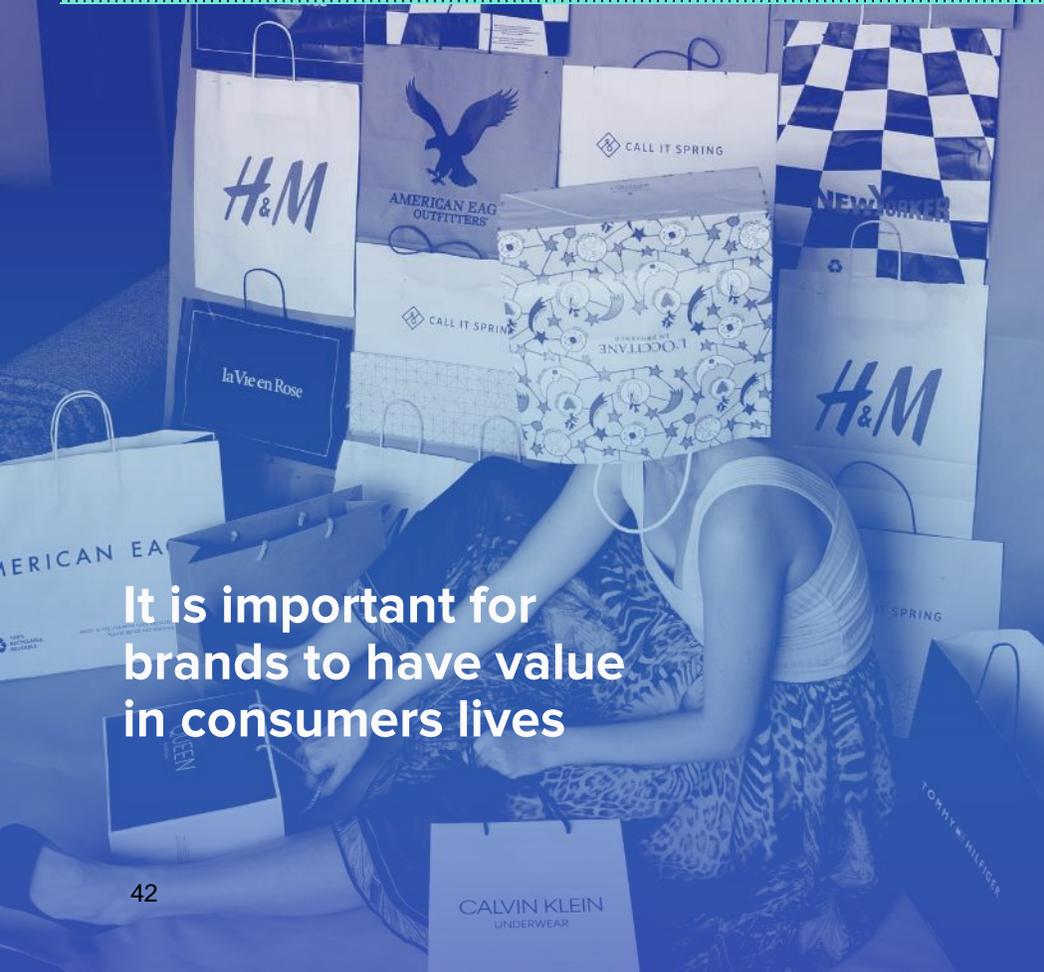
Thanks to tech disruption, consumers want brands and products that <u>take a stand</u>.

The radical and continuous exposure enabled by technology and digital media, has put brands under spotlight than more ever before. As consumers' expectations are rising, they are more and more reflected in purchase decisions in favour of brands with strong core values, acting in socially responsible ways and taking a clear stand within ongoing cultural debate.

Brand purpose is driven by consumer demand for products and services that represent more.

74%

of consumers expect brands to take a stand on important issues.
(We Communications 2019)

71%

of consumers state companies putting profit ahead of people will erode their trust forever.
(Edelman's Trust Barometer 2020)

Brand purpose can also be counter-intuitive to company profit. However this strategy can only work for select brands.

" **"A true brand purpose doesn't boost profit, it sacrifices it"**
Mark Ritson, Brand Consultant

43

The next chapter of consumer understanding

As customer-centricity has been moving to the core of brands and companies' strategies, brand building and market research are changing their face. With responsible and purpose-driven economies and consumption on the rise, brands aims evolving from being the best in the world to being the best for the world. Moreover, a new digital consumer intelligence industry is transforming the market research sector, moving also to the center of organizational Marketing and brand steering.

	HUMANIZED BRANDS	NATIVE DIALOGUE & ENGAGEMENT	PREDICTIVE CUSTOMER	ADVERTISING-AS-A SERVICE
YESTERDAY	Standardized Marketing on segment level with highly professional content and creative	One-way company-push communication and reactive customer service as cost center	Fragmented, aggregated customer knowledge, broad segments and stereotype personas	Intrusive advertising hunting you across digital channels and platforms
TODAY	Adaptive and smart, empathic, authentic and imperfect communication based on moments and context	Native brand-consumer two-way dialogue and predictive and proactive customer engagement	Real-time and fluid customer data and predictive intelligence, hyper-personalization, pro-active ads	Forward-looking brand services, relevant information and consumer-led pull communication

The task for Marketing agencies and orgs in the 2020s:
Stay true. Tool up.

1	**BE BRAVE. BUT TRUE.**	**Your brand is your identity. Create an aspirational vision and live up to it.**

- Brand identity and purpose need to be clear
- Inextricably link mission and business model
- Reflect purpose within organizational design
- Total transparency along the value chain
- Continuously shape brand identity and compliance

2	**BE THERE ALWAYS.**	**You don't have to always be approaching consumers but should always be there when they approach you.**

- Continuous two-way dialogue with the outside world / smart assistants/ conversational commerce
- Real-time brand tracking and social listening
- Rapid reactions to cultural moments
- Agile structures and fast decision making and reactive marketing

3	**BE RELEVANT.**	**Zero ad waste through mindful Marketing practices.**

- Marketing role up the ladder
- CMO to Chief Growth Officer
- Marketing spanning PR, customer service, product etc..
- Marketing as a cross disciplinary function and mindset
- Support non-traditional careers

4	**HELP. DON'T SELL.**	**Customer understanding goes beyond consumption.**

- Service-model and attitude
- Real-time market research
- Own new technologies, channels and formats
- Omnichannel experience / unified retail
- Empathic understanding: Emotional recognition, voice recognition

INSPIRATION ON A PAGE:
Customer intelligence will be THE core of insight-driven Marketing

Winning future organizations see customers as the center of their actions, therefore putting customer intelligence and a new generation of tools, technologies and capabilities of leveraging customer data at the heart of their operations. Next to the technological possibilities for enhanced insights to steer marketing and brands, corporate offerings are shifting more towards a service-oriented and customer engagement mindset following a "what is good for the customer is good for the brand" mentality.

HOW ARE YOUR CUSTOMERS? NOW.

The myriad of consumer data collected in real-time, combined with AI algorithms and capabilities, withholds the potential to leverage both for an enhanced understanding of consumer needs, matching of preferences in a better way, predict market and consumer trends and translating insights into an intelligent approach eventually being the basis for real-time tailored interaction, services, product offerings or new business and service models.
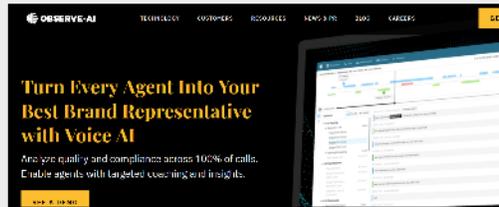
Observe.ai is leveraging speech and language processing to analyze voice calls with 100% accuracy and turn every agent into the best brand representative

Streetbees is an intelligent market research technology company connecting companies to people to gather real time insights, enabled by artificial Intelligence and geolocation technology.

CUSTOMER INTELLIGENCE HUBS

SOCIAL LISTENING

SEARCH & INTENT DATA

REAL-TIME ANALYTICS & SPEECH AI

IOT INTEGRATION IN PRODUCTS

CONVERSATIONAL COMMERCE

THE RELEVANT IN THE ROOM.

Predictive foresighting and consumer intent data will rise in importance, offering marketers the ability to reach the right prospect with the right message at exactly the right time in the buying journey. Combining intent data with high-quality, targeted business data will empower marketers to take data-based marketing campaigns to the next level and drive stronger impact and ROI. Automated data insights, predictive analytics, and new tech like emotion recognition will lead to empathic, highly-relevant and anticipating communication, fighting ad waste.

Waive's Consumer Intelligence Platform uses AI to connect businesses with their future consumer putting them at the center of every decision

Immersion Neuroscience is offering a Neuromarketing solution, studying audience behavior in real-time by measuring the brains unconscious emotional responses

PREDICTIVE ADVERTISING

EMOTION RECOGNITION TECH & NEUROMARKETING

CONTEXTUAL INTELLIGENCE & JOURNEY ORCHESTRATION

ADVERTISING-AS-A-SERVICE

WHATEVER SUITS BEST.

The increasing convergence and commercialization of channels is converting inspirational moments to impulse buying opportunities within one click. Customer intelligence is transformed into an operational function and real-time service allowing for immediate action, a seamless omnichannel experience and enables hyper-personalization to go mass market. Personalized marketing will be supported by new services leveraging new sorts of personal data (e.g. genomic data) or advanced technologies like self-aware bots and smart assistants.
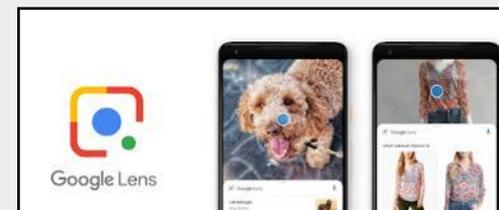
Google Shopping got a redesign with several new features, including options to shop local stores, track prices, find style inspiration through Google Lens and check out with unified cart.

Airbnb is partnering with the biotech firm,23andMe, to provide personalized heritage travel recommendations to their customers based on their DNA.

TOUCHLESS COMMERCE

OMNICHANNEL SHOPPING

SHOPPABLE MEDIA

DNA-BASED MARKETING

END-TO-END CUSTOMER JOURNEY

HYPERPERSONALIZED MARKETING

INSPIRATION ON A PAGE:
Brands surviving transition to tech-led will be empathic & reactive

Brand building is back and has become paramount again: in recent years, the attention of many brands has been distracted too far towards the performance end of the spectrum. Now brand building experiences a revival with brand purpose and humanity being strongly emphasized due to rising consumer expectations and exposure of brands in the digital environment. Technology is supporting listening to consumers needs and opinions and understand their emotional reception and attachment and steer the brand in real-time. It enables brands to become reactive, prove awareness and forward thinking.

BRANDS WITH ATTITUDE

Demand for **purpose-driven and purpose-led brands** is rising — especially among young audiences like Gen Z. With rising expectations of consumers and **always-on dialogue** in the digital world brands will be forced taking a clear stand and responsibility within society. **Living up to purpose** will become even more crucial. Authenticity is key/ purpose is not a pose/ Brand transparency – purpose-driven // leveraging brands for disaster relief / Brand Purpose marketing will eventually die as all brands end up sounding the same and consumers backlash.

Share is a purpose-led consumer goods company following the 1+1 principle to solve world problems. For each purchased product, a person in need is given access to similar food or hygiene products.

IDEO, as a leader in design, has been **part of the problem.**

The global design firm IDEO has been admitting to be part of the problem, stating that there is important discourse happening about racism within the company and promising to act.

PURPOSE REFLECTED IN BUSINESS MODEL & ORGANIZATION

TOTAL TRANSPARENCY ALONG THE VALUE CHAIN

TWO-WAY DIALOGUE & DISCUSSION WITH CONSUMERS

CONTEXTUAL ADVERTISING & WHITELISTING

HUMANIZED BRANDS.

Brands are becoming more human and imperfect. Consumers acceptance of - if not preference for – **unpolished, rough and ready, authentic or user-generated content** is on the rise - as supported by platforms like TikTok or Snapchat. Especially within the happening of Covid-19, brands have experimented with less glamorous content, like communication build on mobile, webcam and **footage including employees or customers**, giving a face to their brand. Technology also allows to design more empathic experiences by means of **AI, emotion recognition**, voice branding or **virtual avatars** and **well-designed digital assistants**.

Walmart has been featuring its employees singing "Lean on me" through their smartphones within their most recent covid pandemic spot.

WANT TO CHAT WITH AN ARTIFICIAL HUMAN? NOW'S YOUR CHANCE

Soul Machines platform is crating lifelike and perceptive digital avatars that communicate autonomously, react to content and context and build a character and personality over time.

CONTINUOUSLY SHAPING BRAND IDENTITY & PERSONALITY

OWNING NEW TECHNOLOGIES

BRAND = SERVICE

BRANDED VOICES & SMART DIGITAL BRAND REPRESENTATIVES

USER GENERATED CONTENT

FLAT. FAST. FOCUSED

A new generation of small direct-to-consumer (DTC) brands is shaking up the landscape. Born on online platforms like Amazon, Instagram, Snapchat etc., these digital native brands are connecting directly with consumers by using online-first, highly targeted, and micro-influencer strategies, challenging the old ways of doing business, rethinking product and retail model, from simple, affordable, specialized positioning to focusing on consumer trust and authenticity.

Instead of investing heavily in e-commerce platforms, small businesses like Frauhansenshop leverage Instagram and Stories to provide a profound, authentic and user-centered sales experience.

Sneaker startup Allbirds became famous for comfortable merino wool sneakers and sustainability commitment. Lately adidas announced a cooperation for an emission free sneaker.

REAL TIME BRAND TRACKING & SOCIAL LISTENING

TOPIC OF INTEREST MONITORING & ALERTING

OWNING NEW CHANNELS & FORMATS

AGILE STRUCTURES & FAST DECISION MAKING

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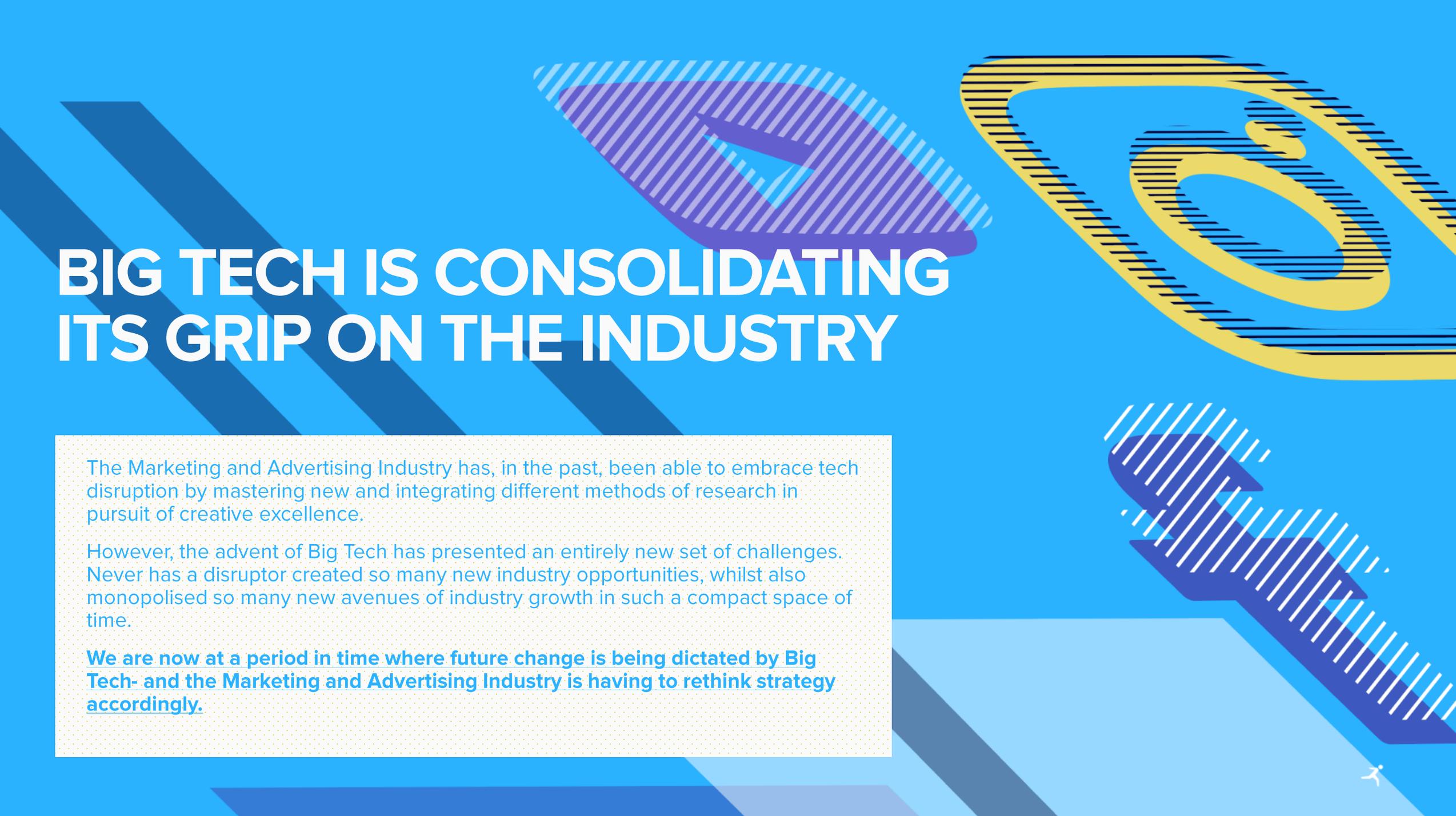
BIG TECH IS CONSOLIDATING ITS GRIP ON THE INDUSTRY

The Marketing and Advertising Industry has, in the past, been able to embrace tech disruption by mastering new and integrating different methods of research in pursuit of creative excellence.

However, the advent of Big Tech has presented an entirely new set of challenges. Never has a disruptor created so many new industry opportunities, whilst also monopolised so many new avenues of industry growth in such a compact space of time.

We are now at a period in time where future change is being dictated by Big Tech- and the Marketing and Advertising Industry is having to rethink strategy accordingly.

Key impacts of technology in the Marketing process

What has changed in the last 10 years?

The consequences for the Industry:

INCREASED SPEED

AI is replacing human tasks.

82%

of US display ads purchased programmatic in 2020

INCREASED DATA

Every touchpoint is now a sales opportunity

YouTube

Launches new shoppable direct ad format in June 2020

2010 ——— **2020**

INCREASED CHOICE

Data is only good if acted on immediately

87%

of organizations require data to be ingested and analysed within one day or faster.
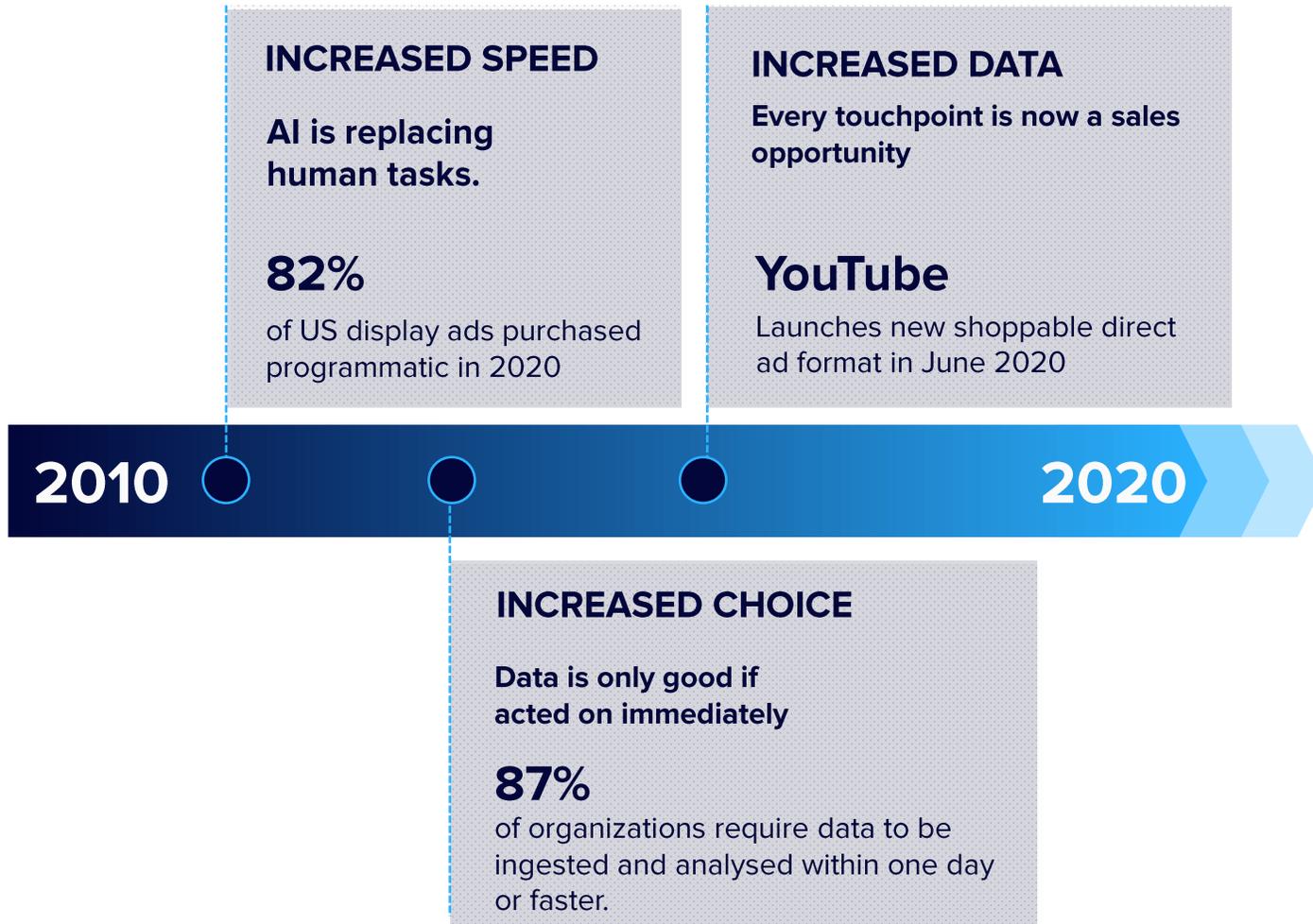
Everyone is in a race to gather and exploit data

Data accumulation and application becomes as important as the Marketing itself

Having to pay to get inside the walled gardens

Being able to reach a mass amount of consumers means dealing with a minute number of platforms

Where we are today?

WHAT IS THE BIG TREND?

Big Tech is consolidating its grip on the Industry.

WHAT ARE THE INDUSTRY IMPLICATIONS?

1 **Data is valuable- more data means concentrated wealth**

Data in itself has become a new global currency, as everyone fights to access more data the big tech giants increase its stranglehold on access with the Industry grappling for solutions.

2 **(Data-driven) Media is increasingly channelled through Big Tech**

Fewer big tech groups are dominating more and more of the Industry media budgets.

Big Tech firms now dominate the entire Marketing journey from insight to ROI

The Marketing process has always worked with media channels and publishers – places where brand and Marketing messages could be communicated to reach consumers. At the beginning of the 2010s, the playing field was still equal and creative solutions were widespread, but channels have been digitised now to such an extent where nearly everything developed end-to-end relies on a few large tech companies to provide insight, access, and ROI.
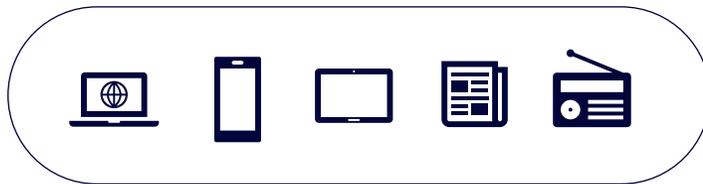
FROM
Web 2.0 unleashing creativity and Marketing opportunities.

TO
Big tech platforms controlling more and more of the Marketing process.

The Marketing Idea

One-to-many transmission of brand narrative

Market Research

Website development

Communication channels

Conversion performance

Search optimisation

Content formatting

Marketing metrics tracking

ROI performance
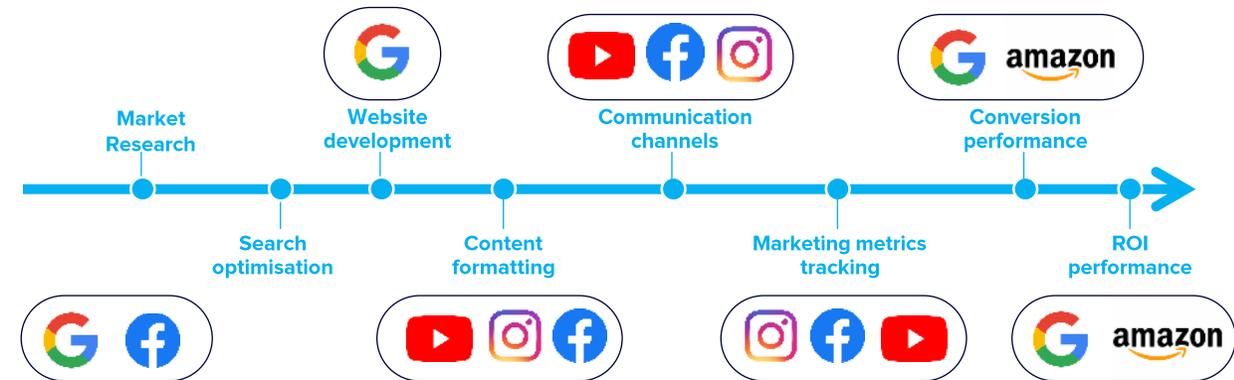
Many-to-many transmission of narrative and sentiment

Marketing Technology has become the main driver of the wider Marketing industry growth.

All major Marketing suites (e.g. Salesforce, Adobe, Oracle, Hubspot, Shopify, Microsoft) have turned into ecosystems and marketplaces with open APIs and marketplaces for third party apps. The ever-evolving landscape driven by IT giants, platforms, and startups are a blessing as well as a curse for marketers trying to navigate the complex space identifying the useful applications and integrating them within their own stack.

FROM
Web 2.0 unleashing creativity and Marketing opportunities.

→

TO

Big tech platforms controlling more and more of the Marketing process.

Market Research agencies

Creative Agencies

Media Agencies

PR agencies.

$121.5 Billion
global Mar-Tech industry in 2019
(BDO & WARC 2019)

>8,000
Mar-tech products on the market, up from 150 in 2011
(CHIEF MARKETING TECHNOLOGIST, 2020)
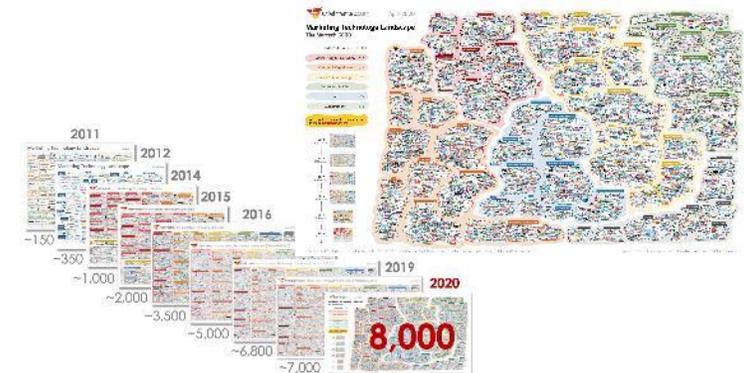
Big agency holding groups have always helped evolve the Industry, but may struggle in the current age of tech-led divergence.

As new technology helped expand the scope of Marketing and Advertising's remit over the past decade, big agency holding groups focused on avoiding industry divergence through acquisitions and market consolidation. It was a successful source of business growth.

For a time, this strategy had worked to keep up to date with changing capabilities and service evolving brand and client demands.

However in the age of Big Tech we are again in a new moment of divergence being led by Mar-Tech. Traditional business consultancy holding groups are moving in on the Industry, challenging incumbents who have been fending off Big Tech for talent and resources.

CNBC

Accenture bought (Droga5) an indie agency, as boardrooms get serious about creative marketing **05/2019**

The Economist

The share prices of the big five—WPP (which owns Group M), Omnicom, Publicis, Interpublic and Dentsu—have been flat or sliding for at least three years **06/2020**

The Drum.

UGC is exploding in popularity among brands during Covid-19 **06/2020**

The Marketing and Advertising Industry has gone through periods of expansion and convergence as new tech has developed.

Mobile App

Social media

Websites

CRM

Omnichannel

2030

Industry consolidation by holding groups.

Industry consolidation by holding groups.

New agencies servicing new tech.

New agencies servicing new tech.
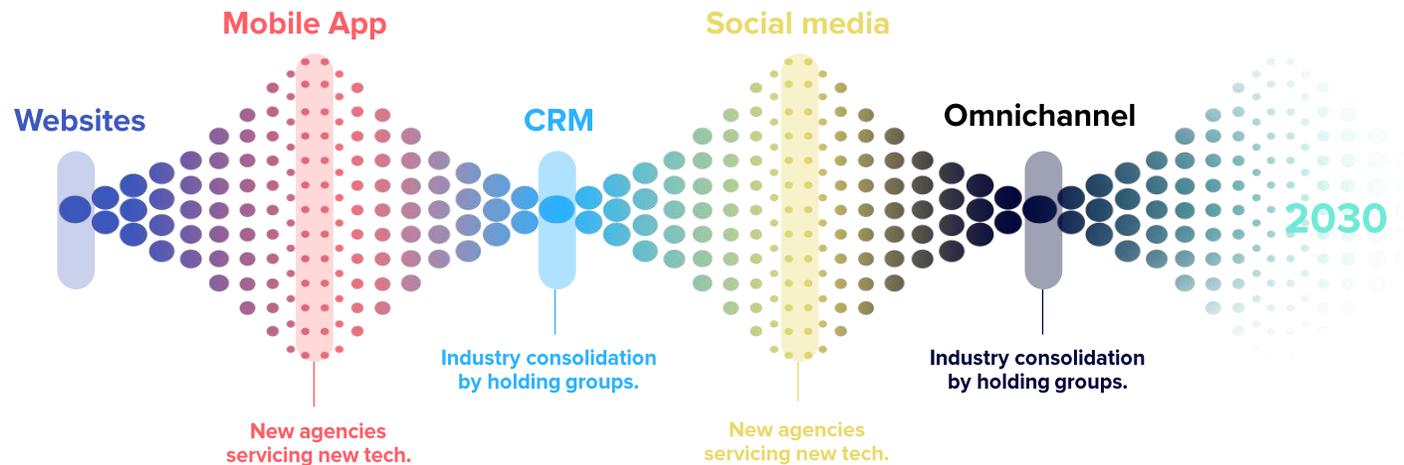
While forecasts encourage agencies to weather-up for brighter futures, the mood remains cloudy

The lack of internal resources (namely, data) and skills to build and integrate the new resources and tools into brand and agency Mar-Tech stack is leading to gaps in technological adoption and expertise needed to harness the potential of these technologies.

Lack of understanding technology and missing skillsets.

Tech fear and resistance has been putting a break on the new industry dynamics, due to a lack of the right skillsets as well as understanding of Marketing Technology and its long-term disruptive impact on the Industry.

Tech disruption remains small, but overall size of pie is shrinking for big incumbents.

There is a discrepancy in perception between of Mar-Tech dominance and the actual state of the Industry, still being dominated at large by agencies and creative organizations. However, with more players, the Ad-Dollar that the industry can demand becomes diluted.

Feeling like the Industry is always playing catch up to the next thing.

Marketers trying to stay ahead of the curve still find themselves in a playing catch up, constantly implementing new tech and tools but still feel they are falling behind.

"There are so many Mar-Tech tools out there that can do amazing work, but I think there is a distinct lack of understanding at the moment of what is going to benefit that brand over both the short and the long term."
Carey Trevill, Co-Founder and Director, Mission Element

Nearly half of both B2C and B2B companies lack the skills or people to manage Mar-Tech properly.
Econsultancy, Marketing in the Dark 2018

EXHIBIT 2 | The Marketing Ecosystem of the UK, Germany, and France Has More Than 70,000 Participants

UK
>35,000 companies

Germany
>26,000 companies

France
>16,000 companies

Sources: Dun & Bradstreet; chiefmartec.com; OpenCorporates; BCG research and analysis.
Note: All numbers rounded to the nearest 10. Agencies and publishers with fewer than ten employees or less than $100,000 in estimated annual revenue excluded.
[1] Apparent discrepancies in totals are due to some companies being listed in multiple categories.
[2] Includes out-of-home advertisers, direct-mail publishers, and others not explicitly classified.

80%
of marketers reported increased ROI over the past three years, from tech, targeting and segmentation and measurement capabilities
(BCG 2019)

95%
feel pressure to improve still further.
(BCG 2019)

"PEOPLE ARE AFRAID OF TECHNOLOGY"

- Global CMO, Agricultural Machinery Industry

TREND DEEP DIVE:
Who owns the Industry data?

Performance data is not democratic

To sum up the disruption technology has had on the Marketing and Advertising Industry you only need one word: data.

The ability to collect, store, analyse, and act on the actions of consumers online has created a whole new dimension to how the Industry operates.

What used to be long term research and studies into Marketing effectiveness, reach, performance is now instantaneous and real time. But performance data is not democratic. Big tech, in monopolising consumer attention and industry media spend, now owns access to the data.

The need to access and own 1st party data as well as the ability to analyse it effectively are becoming must-haves for Marketing Industry agencies and organisations. On top of this thirst for data is **the continued need to analyse and act on data – effectiveness and efficiency improvements are only as effective as the organisation that is set up to analyse and act on data when it matters.**

Data has a better idea

The world of data is both a problem and a solution for the Industry

The past few years has seen the Industry obsess over the collection of data. Data lakes, data dams, data sources have all become industry buzzwords.

But the massive consumer data gathering process has introduced as many problems as it has possibilities. More data created new pitfalls in value and accuracy as the Industry struggled to understand how to effectively utilize data.

As skepticism on external data quality is growing and cookie-based third-party data ads is forecasted to go belly-up, access to first-party consumer data is gaining traction.

All the while understanding the end to end process of the Marketing and consumer purchase journeys risks becoming more complex and less accurate.

21Cents
Number of cents wasted on every media dollar due to poor data quality
(Forrester Consulting 2019)

90%
Of unstructured data in organizations never analyzed "dark data"
(IDC 2016)

32%
Amount of marketing team's time spent on managing data quality
(Forrester Consulting 2019)

" **The past few years have been about collecting data,[...]Now it's more about making meaningful connections from that data."**
James Tower, Founder, 16K Agency

"IN THE PAST MARKETING WAS ABOUT GUT FEELING AND ONE SIZE FITS ALL MESSAGES. TODAY'S MARKETEERS NEED DATA INSIGHTS TO CREATE INDIVIDUAL AND UNIQUE CUSTOMER EXPERIENCES TO GROW THE BRAND."

- Marc Lengning, Chief Marketing Officer, BMW

The future of the Industry and data is wide open

The generation of data only works when consumers and users submit to letting their data being used. But recent examples of poor data management, data leaks and improper use of data has created a consumer backlash.

The future ability of big tech to continue to generate value from consumer data only works when these platforms maintain user trust. The Industry has been eroding trust due to data breaches and leaks, undisclosed sharing of consumer data, and unethical corporate data practices.

The continued supremacy of big tech giants and the consumer data they control is not a given. **The opportunity for the Marketing and Advertising Industry is to upskill and diversify data acquisition and analysis and order to insure against changes over the next decade.**

Breaches & Scandals & worst practices

DIGITAL TRENDS
Facebook faces another huge data leak affecting 267 million users
12/2019

Governments fining

campaign
Google hit with €50m GDPR fine over ads breach
01/2019

Governments scrutinizing

FINANCIAL TIMES
Adtech industry operating illegally, rules UK regulator
06/2019

FEDERAL TRADE COMMISSION
PROTECTING AMERICA'S CONSUMERS
Google and YouTube Will Pay Record $170 Million for Alleged Violations of Children's Privacy Law
09/2019

Industries/Company Types that US Internet Users Trust, Sep 2017
% of respondents

|	
Banks	42%
Hospitals	42%
Healthcare providers	39%
Insurance companies	26%
Nonprofits	24%
Government	23%
Utilities	23%
Information technology	21%
Professional services	17%
Pharmaceuticals	16%
Aerospace	14%
Food & beverage	14%
Online retailers	13%
Agriculture	12%
Energy/oil/gas	11%
Hotels	11%
Airlines	10%
Automotive	10%
Manufacturing	9%
Telecom	9%
Sports organizations	8%
Construction & real estate	6%
Media & entertainment	6%
Social media	6%
Startups	5%
Marketing & advertising	3%

Note: respondents chose their top 5
Source: PwC, "Consumer Intelligence Series: Protect.me," Nov 1, 2017
233983
www.**eMarketer**.com

Company that US Internet Users Trust the Least with Their Personal Information, April 2018
% of respondents

Facebook	56%
Google	5%
Uber	3%
Twitter	3%
Snap Inc.	2%
Apple	2%
Amazon	2%
Microsoft	1%
Lyft	1%
Tesla	1%
None of the above	20%
No answer	4%

Note: n=2,772 ages 18+
Source: Recode survey as cited in company blog, April 10, 2018
236941
www.**eMarketer**.com
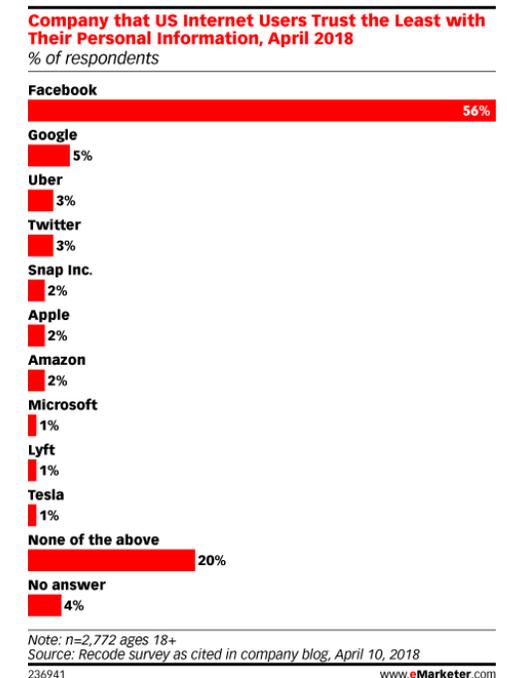
TREND DEEP DIVE:
Where is the Industry spending its media money?
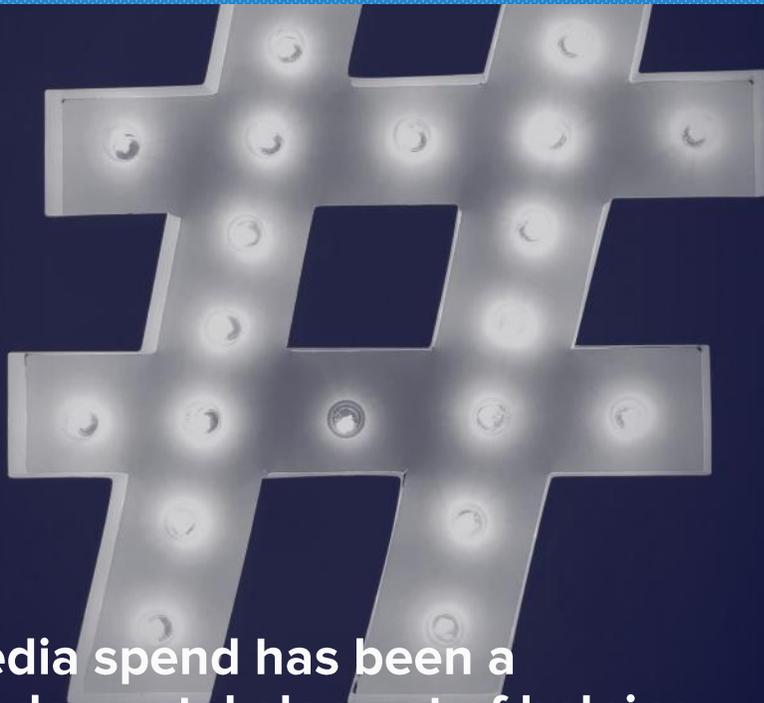
Media spend has been a fundamental element of helping brands

For most of the Marketing and Advertising Industry's history, media spend has been a fundamental element of helping brands gain consumer and market awareness.

Until recently, media was limited to a few big mediums – print, out of home, television and cinema. Growing a brand relied on finding the right publishers, broadcasters and locations to place Marketing messages.

Big tech and the rise of search, social and selling platforms changed this. Adding new platforms, and over time, consolidating more and more consumer attention away from traditional media.

For a while, the tech industry was fragmented with brands able to put investment across multiple channels and platforms in order to reach the consumers it wanted. However, this fragmentation has become increasingly re-consolidated, so much so that only a few major tech players now dominate global industry media spend.

Industry media spend today is concentrated in a few big players

Google and Facebook have been tightening their grip on the digital advertising landscape over the past decade. Their nearest competitor, Amazon, which has only recently launched a self-service ad-tech platform for buyers and integrated its ad-tech acquisition Sizmek ad server, is gaining share of the ad dollars, shifting the power distribution towards a new triopoly.

All the while traditional media channels like print and broadcast television continue to struggle to grow. As big tech continues to keep the attention of possible consumers, new entrants will struggle to fight against these incumbents.

Global digital ad spending in 2019

$560 BILLION
WORLDWIDE GLOBAL AD SPENDING IN 2019
STATISTA 2019

$333 BILLION
WORLDWIDE DIGITAL AD SPENDING 2019
EMARKETER 2019

61% of global online advertising market is owned by Google and Facebook

WARC 2019

Duopoly challenged by Amazon

Amazon Challenges Ad Duopoly
Top 5 companies by estimated share of U.S. digital advertising revenue*

2018 2019

Google 38.2% 37.2%
facebook 21.8% 22.1%
amazon 6.8% 8.8%
Microsoft 4.1% 3.8%
verizon 3.4% 2.9%

U.S. digital ad spending in 2019
$129.3 billion
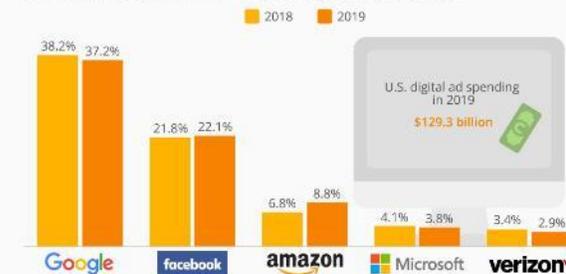
* includes all types of ads appearing on PCs and mobile devices, incl. ad revenue from all platforms owned by the respective company (e.g. YouTube for Google or Instagram for Facebook)

@StatistaCharts   Source: eMarketer

statista

"The Industry needs an independent regulatory watchdog that would serve to scrutinize the powers of the big tech giants, diminish the monopoly they have and demand greater transparency, which would build trust among consumers."
Ruth Manielevitch, vice president of global business development at mobile ad technology company Taptica.

How effective or transparent is this media spend?

The consolidation of media spend amongst big tech has not been without issues.

The lure of media spend to big tech platforms and services was built not just on access to consumers, but also on the new data and metrics available to judge results. However issues have emerged, where effectiveness, efficiency and transparency of media have all been questioned.

Not knowing if you are reaching the desired target, or worse, your content is being put against unsafe content has brands concerned.

The ad-tech industry is increasingly under scrutiny being accused of ad fraud, inefficiency due to bad targeting and poor ROIs.

The relationship between brands, agencies and ad-tech is trying to push for more transparency, ways to verify effectiveness without relying on black-box data.

In the summer of 2020, the backlash began, with some of the worlds big global media spenders pausing social media – Facebook – media spend due to the platforms unwillingness to address unsafe content concerns.

How this situation plays out depends on who owns the future of industry data.

$10.9 BILLION
Amount of wasted media budget by 2021
(Forrester 2016)

40%
Of all media spend is wasted
(Commerce Signals 2019)

>1/3rd
Of programmatic ads are served to the wrong target
(Ipsos 2018)

10-30%
Of programmatic ads do not reach human eyes at all
(Ipsos 2018)

P&G cut digital advertising spend by $200 million because its ads were not reaching its target audience effectively.
03/2018

Adidas suspends Facebook video ad buys over lack of transparency
05/2018

The next chapter of big technology

The Marketing and Advertising Industry has been focused on gathering all data possible within moral and legal boundaries. However, next to media distrust, the ad-tech industry facing the debate of efficiency and effectiveness of digital media spend as well as the issue of walled gardens monopolizing data access. **Advertisers trying to build up their own data ecosystems, safeguard brand reputation related to data practices, as well as alternative ways to verify effectiveness of their actions are the ways the Industry will evolve into the future.**

	ALTERNATIVE ADVERTSINIG	OUTCOME & EFFECT	FIRST PARTY DATA FRENZY	ZERO PARTY DATA	ETHICAL BY DESIGN
YESTERDAY	Traditional advertising duopoly by tech giants	People-based marketing and masses of unused data collected	From cookie-based third-party data targeting	Unreflected data sharing with few alternatives and data monetization by third parties	Doing what is possible and could be done and highly skeptical consumers
TODAY	Fragmented alternative ad networks and new outlets and contextual advertising	Outcome-based Marketing and Advertising and budgeting and data quality top of mind	Access to first party data via own collection, new ways of collection and partnerships	Data owned by the individual and monetization as well as rewards in exchange for data	Doing what is right and should be done and privacy driven design

The task for Marketing agencies and orgs in the 2020s:
Get smarter and stronger with data.

1 THE DATA TRADE PLAY.

Secure first party (consumer) data access

- Understand if you need consumer data in the first place
- Establish data sharing agreements
- Build first party data lakes
- Zero party data access model
- Shared ID / Identity graphs
- Identify new ways of data access (IoT products etc.)
- Shift to cookie-less channels/ contextual targeting

2 PROVE OF IMPACT.

Outcome-driven: Efficiency to effectiveness.

- Marketing effect modeling
- Near-term performance measurement
- Live ROI tracking
- Econometrics
- Ad transparency

3 DATA FOR GOOD.

Having a clear narrative how (consumer) data is used and handled

- Data ethics & governance guideline
- Data usage transparency
- Data ownership & sharing agreements with customer
- Access for customers to their own data

4 COLLECT ONLY WHAT MATTERS.

Fight the failure and cost of unutilized data potential

- Establishing a clear data strategy build on what you need to know
- Data auditing to identify what is there already
- Data access strategy to fill the missing gaps of data
- Data integration and unification
- Data handling skillset & expertise building

INSPIRATION ON A PAGE:
The future of outcome based marketing

OUTCOME-BASED MARKETING

With **ad fraud** on the rise, adtech industry is increasingly under scrutiny for **bad targeting and poor ROI.** The relationship between brands, agencies and big tech is seeking for more transparency and approaches evaluating **effectiveness** instead of efficiency only paying for performance. **ROI tracking** will become more important than ever. Digital attribution is supplemented with split-testing, econometrics and near-term performance measurement and advertisers are going back to the days of media mix modeling.

Unilever has a developed a cross-media measurement model and is fielding input from other advertisers to improve it, as part of its efforts to clean up the digital ad ecosystem.

Cannes Lions and WARC launched the creative effectiveness toolkit for highly effective creative marketing

MARKETING EFFECT MODELING

NEAR-TERM PERFORMANCE MEASUREMENT

LIVE-ROI TRACKING

ECONOMETRICS

AD TRANSPARENCY

FIRST PARTY DATA & ALTERNATIVE AD NETWORKS

In a post-cookie era publishers and advertisers are faced with **walled data gardens** like Google, Facebook or Amazon. Increasingly groups of publishers and advertisers collaborate on establishing **cross-platform identity systems and unified-IDs** to fill the void and **allow first-party data sharing** and access amongst media properties. Furthermore, new players invest, launch own first-party advertising software, platforms and services, to increase revenue and gain a share of the big tech ad money.

Demand-side platform The Trade Desk aims to decrease the number of cookie syncs conducted on web pages by allowing other DSPs, SSPs, and DMPs via their Unified ID.


Washington Post unveiled Zeus Prime, a proprietary platform allowing companies and marketers to buy automated ads in real-time.

DATA SHARING AGREEMENTS

UNIFIED ID & IDENTITY GRAPHS

FIRST PARTY DATA LAKES

ALTERNATIVE AD NETWORKS

PAYWALLS FOR CONTENT

CONTEXTUAL MARKETING

In the age of privacy **contextual targeting is seeing a resurgence** – propelled by advancements in technologies like **natural language processing** and **artificial intelligence**. Contextual intelligence goes beyond keywords - analyzing text, speech, imagery, metadata, geo-location and allows cross-referencing with first-party data in real-time. **Predictive contextual segments** are updated automatically to jump on trending content and allow campaigns to be optimized in the moment

Sentiance offers contextual AI solutions for behavioral insights. It uses IoT sensor data into insights about people's behavior and real-time context, creating behavioral profiles and support predictive capabilities.

Contxtful uses ML and AI algorithms to understand the context and environment of a customer's mobile device, improving audience targeting without compromising privacy
.

COOKIELESS CHANNELS

CONTEXTUAL & CONTENTUAL INTELLIGENCE

SPEECH RECOGNITION & ANALYSIS

BEHAVIORAL BIOMETRICS

EMOTION RECOGNITION

CHATBOTS

03

WHAT DOES THE FUTURE NEED TO BE?

What our future forecasts are for helping the Industry thrive from Covid-19 and through the 2020s.

# COVID-19 has been a double edged sword: driving massive media consumption but a plummet in industry ad-spend

The disruption we've seen from Covid-19 is unprecedented in both speed and scope. In the media world, Covid-19 has perhaps created the greatest imbalance between media consumption, which has skyrocketed, and advertiser spending, which has plummeted.

Advertising spending down

Ad spends are down
9% ▼
On average across Europe.

Facebook, Google Could Lose Over $44 Billion in Ad Revenue in 2020 Because of Coronavirus
By Todd Spangler ∨
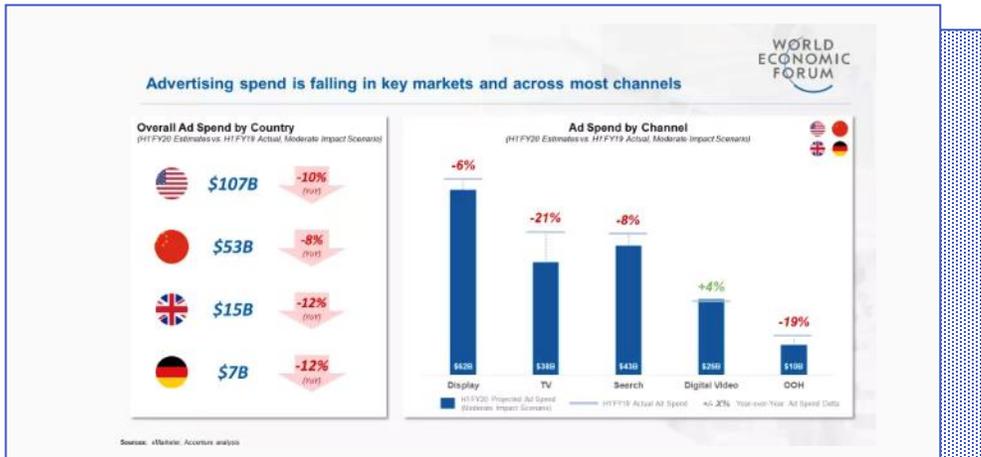
Media consumption up

VS

NETFLIX Netflix added

15.7 Million
New subscribers around the globe during the pandemic.

36%
Increase in time spent by internet users watching news coverage in Germany

Screen Time All the Time

Based on research, The New York Times recently proclaimed something many of us had already assumed: that the "coronavirus has changed the way we internet." Our tolerance for screen time has never been higher, and that's not likely to change.

COVID-19 has accelerated evolution of Marketing creativity

What is clear from this collective experience is that the pandemic only accelerated 'trends' that were already there: agile workforces and processes, tech-led businesses, new models for new marketing, and complete visibility of all aspects of consumer's digital journey to better evaluate the performance of marketing and maximize ROI.

Brands in the "new normal" will need to be faster to **create a path to purchase no matter the circumstance** particularly if we see further COVID-19 waves in the future.

Brands cannot always focus on creating emotional concepts, this **needs to be balanced with originality & activation** to simulate purchases.

4. Creativity, innovation and agility is a way of life

Marketing teams **need to embrace an agile culture of innovation and creativity** when every day brings a new challenge. Brands are finding new ways to work, crunching numbers quickly and making fast decisions in large, previously bureaucratic organisations.

" **Businesses that had not only developed digital strategies but executed on them prior to the pandemic are now in a position to leapfrog their less nimble competitors.**

— BDO IN A REPORT ON HOW COVID-19 IS ACCELERATING THE RISE OF THE DIGITAL ECONOMY

United States, Creativity during COVID-19
WARC DATA
Resources for producing new creative assets considered "very important", % of marketers

Resource	%
In-house agency in the US	55%
Other internal team	42%
External agency in the US	26%
Media partners	22%
Production companies - sourced directly	11%
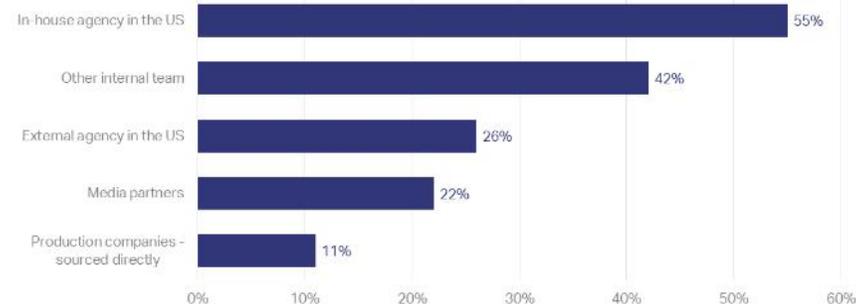
Note: Based on survey of ANA members (n=196), March 30ᵗʰ to 31ˢᵗ.
Question: What resources are currently important to you for producing new creative assets? Please rate on a scale of 1-5 where 1 = Not important and 5 = Very important.
SOURCE: Association of National Advertisers

# COVID-19 forced brands to react quickly to evolving consumer needs through targeted campaigns

An analysis of Marketing campaign creativity by TD Reply using the Data Creative Score tool illustrated how brands reacted over the evolving pandemic.

Initial campaigns that targeted fundamental human needs but as consumer confidence grew with the changing nature of the pandemic, brands could return to higher need states through creativity.

DATA CREATIVITY SCORE

Measuring creating effectiveness.

Self actualization
Desire to become the most one can be

Esteem
Respect, self-esteem, status, recognition, strength, freedom

Belonging
Friendship, intimacy, family, sense of connection

Safety needs
Personal security, employment, resources, health, property

Physiological needs
Air, water, food, shelter, sleep, clothing

Maslow's hierarchy of needs pyramid

TikTok
May 2020

OTB
May 2020

Nivea
April 2020

Vodafone
March 2020

6 steps for brands to stay ahead as data-driven Mar-Tech disrupts the Industry

1

Brands and Marketing departments need new structures that embrace change.

2

Agencies need new operating models to balance creativity with agility.

3

The industry needs a new insights framework built on data and focused on actionability.

4

An evolution of industry theory to future proof against uncertainty.

5

Marketing's relationship with Big Tech needs to change.

6

Brands need to take a fearless approach to data analysis, exploration and investigation to survive.

"IT'S THE MOST EXCITING TIME TO BE IN COMMUNICATION EVER. IT'S A WHOLE NEW BOARD GAME."

- Björn Bremer, CEO, Ogilvy
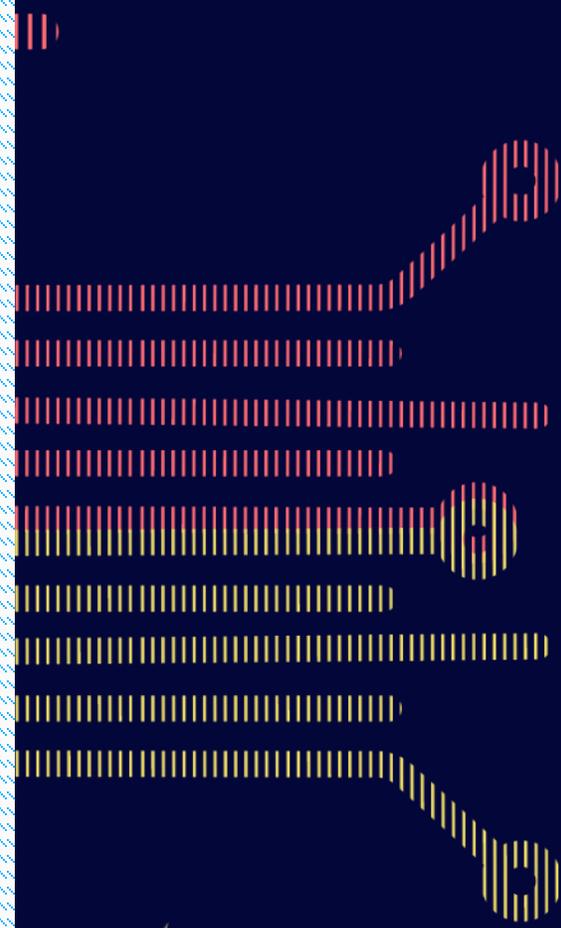
1 Brands and Marketing departments need new structures that embrace change.

Traditional big Marketing organizations have been structured for scale.

However big brand set-ups are losing out: siloed knowledge, repetitive tasks across divisions, and a lack of single focus on customers is costing both business efficiency and effectiveness.

Siloes need to be broken down faster and new organizational models emerge.

Organizations need to better balance the experience of older C-Suite with the expertise of digitally savvy employees along a new iterative internal process.

The Agile, Iterative and Adaptive Marketing Process

Shorter cycles of action at greater frequency
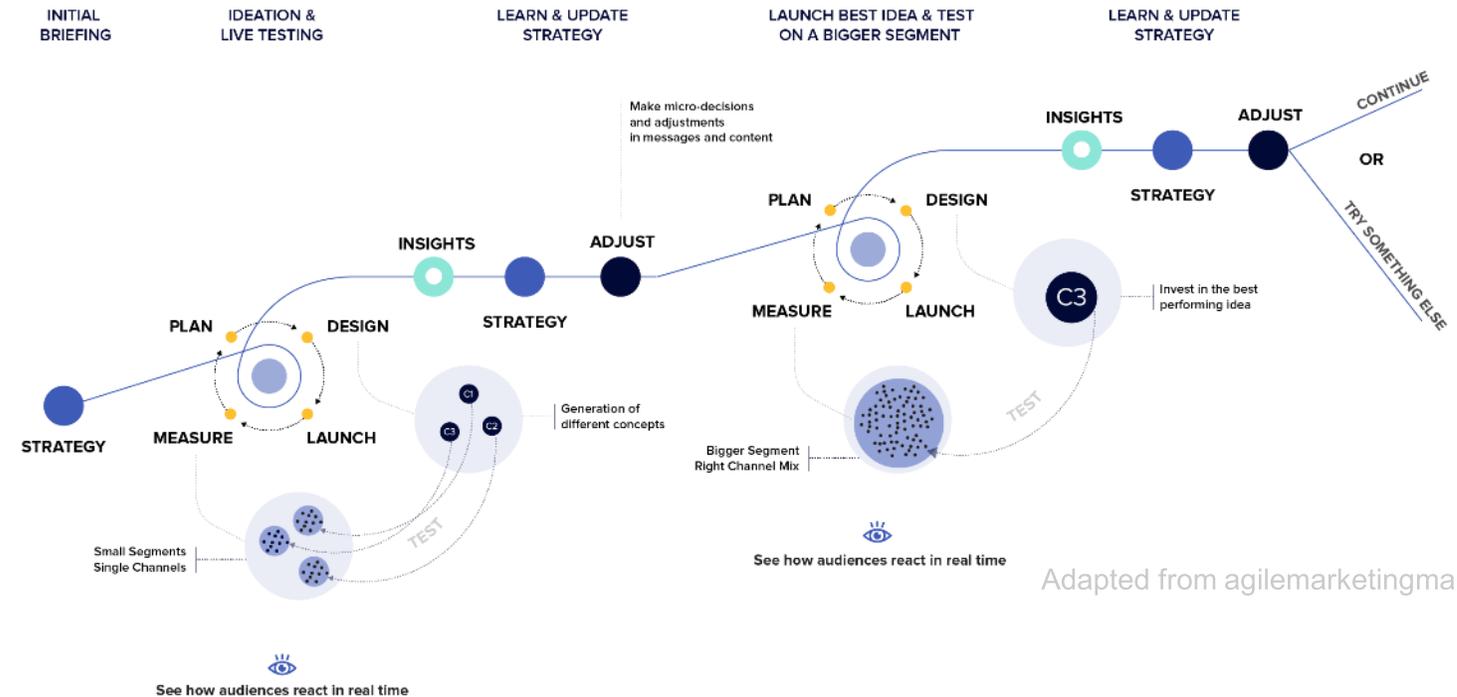
Adapted from agilemarketingmanifersto.org

The Benefits

- Adaptive feedback loops
- Micro-decisions to personalize content based on the audience reaction and content performance
- High agility = high conversions

How to get there

- Get buy-in from stakeholders
- Hire for agility
- Plan for change and Skepticism
- Get the right tools and tech that support agility

2 Agencies need new operating models to balance creativity with agility

The Agency Industry landscape is going through a crisis of purpose, of talent, of growth. Traditional agency knowledge is turning obsolete.

As the role of agencies as connectors between brands and consumers is being challenged, agencies need to evolve into data-and tech experts. But using a technology doesn't mean brand messages are going to be irrelevant.

Human creativity is still the most important source for efficient campaigns and agencies need to find the best balance.

The future survivors will be agencies that harness creativity and technology in new agile processes.

A new agency model blending creativity with technology.

Creative
Human Creativity

Creative Strategist

Campaign Manager

Analytics lead

CopyWriter

The new agency teams

Data Science Lead

UX Designer

AI/ML Lead

Technology
Data-driven technology

Media/Platforms Lead

Technologist

The Benefits

- Adaptive feedback loops
- Micro-decisions to personalize content based on the audience reaction and content performance
- High agility = high conversions

How to get there

- Get buy-in from stakeholders
- Hire for agility
- Plan for change and Skepticism
- Get the right tools and tech that support agility

3 # The Industry needs a new insights framework built on data and focused on actionability.

Traditional market research is slow, costly and runs risks of being outdated by the time results are implemented.

Current data-driven methods of consumer research prioritise pace but lack structures that balance nuanced insights alongside consumer motivations and purchase intents.

A new model is needed. One that not only organises insights effectively with technology, but avoids the traps of simply repeating what consumers want, rather than finding what they need and taking them forward.

Merging data and tech to deliver experiences beyond the predefined dashboard
The most relevant insight streamed to each user based on their context, role or use
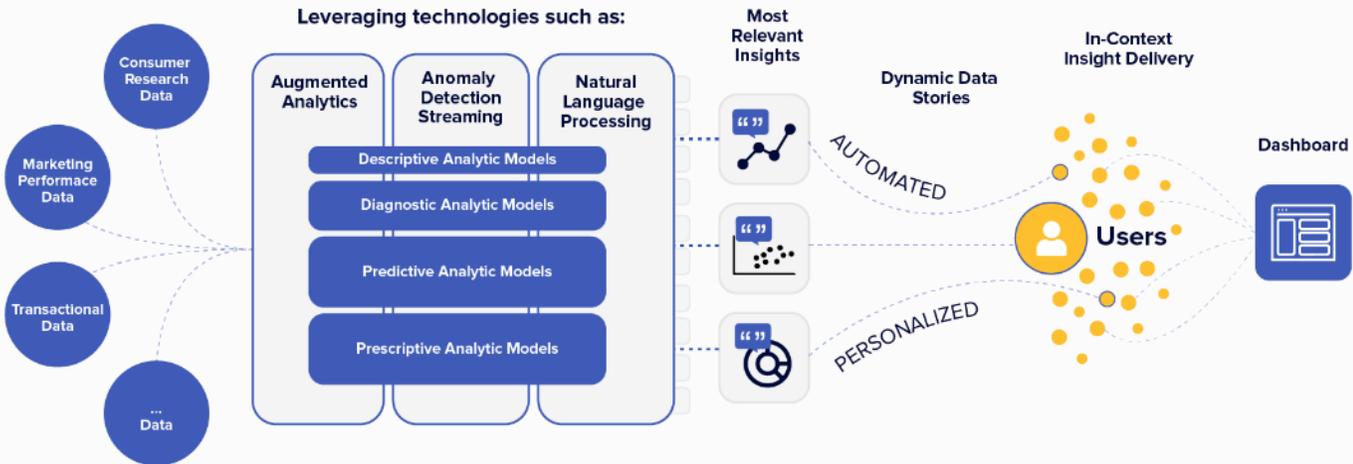
Bringing fast actionability of insights accross the organization and business.

The Benefits
- Adaptive feedback loops
- Micro-decisions to personalize content based on the audience reaction and content performance
- High agility = high conversions

How to get there
- Get buy-in from stakeholders
- Hire for agility
- Plan for change and Skepticism
- Get the right tools and tech that support agility

# 4 An evolution of Industry theory to future proof against uncertainty

Brands understand that the new age of Data-Driven Marketing has created a new dynamic between consumers and their products. Consumers no longer need their purchases to solve utilitarian needs, but stand for something more life affirming.

Brands need to not only remember the fundamentals of how to achieve growth, but how to balance these with the challenges of today.

A combined set of 4Ps is what the Industry needs, balancing the original theory that built the Industry today with a lens to help the Industry continue to grow into the future.

Building the bridge between old theory and new practice.
Rally the Industry around a theory, practice and energy to do better in the 2020s.

Your consumers. Your employees. It's the people that make your brand exist. Put them centre.

Everything can be tracked and optimised. Focus on measuring what matters and where improvements short and long term can be made.

P PEOPLE

P PURPOSE

P PERFORMANCE

P PREDICTION
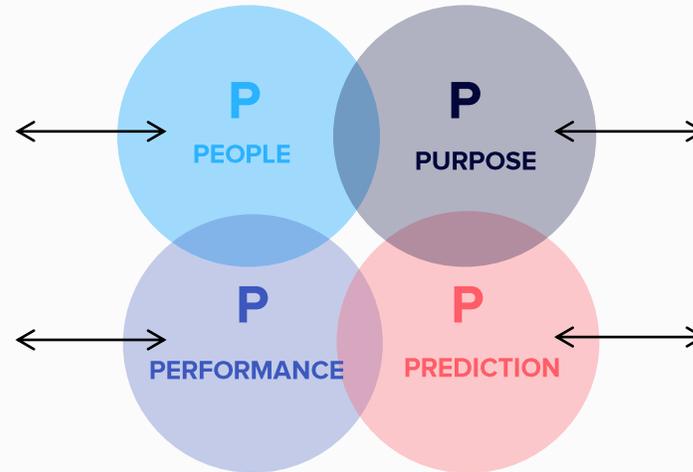
Keep your purpose. But align it with your brand and your customer. If you are not solving problems you don't have a purpose.

Don't just react to what's happening. Make time to look at what is coming next. Use data and tools to make this happen.

The Benefits

• Taking what worked in the past and updating it for the future
• Blends the strengths of Marketing with the strengths of technology
• A set of objectives to make the Industry proud of the role it plays again

How to get there

• Educate the future talent on these objectives
• Create new internal processes based on the new 4Ps
• Stay focused on meeting these goals and not getting distracted by the latest craze

5 Marketing's relationship with Big Tech needs to change

We are now in a stage where Big Tech platforms are controlling how the Marketing and Advertising Industry operates.

Once both industries played to each other's strengths, but now Big Tech holds dominance. Marketing and Advertising is being forced to pay for access, pay for data, and pay to try catch up to the new Industry leader.

Marketing and Advertising needs to remind itself of its original strengths.

Remember what sets the Industry apart from Big Tech
Ideals to rally around and restore reputation in the face of a tech-led future

IDEAS	INNOVATION	CLOUT	DATA
The power of creativity to create culture.	New products, services and brands pushing the world forward.	Media and messaging spend that entire industries rely on.	New untapped data sources that are out of reach of Big Tech.

The Benefits

- Double down on strengths
- User clout to challenge unequal Industry relationships
- Use as a platform to build future capabilities – eg: 1st party brand and product data

How to get there

- Re-think why the Industry wants to win awards
- Spend more time thinking about actual strengths versus Big Technology
- Focus on turning strengths into assets that build industry cloud

6 Brands need to take a fearless approach to building their own data driven Marketing process

The use of data is already a fundamental element of the Marketing and Advertising Industry.

But the capture and use of data is still developing within Marketing and Advertising. This needs to change. Currently data is resulting in bad advertising, ruining perceptions and frustrating the suppliers of data, consumers.

The Industry needs to educate itself. Treat the capture and application of data as being as important as the traditional elements of Marketing itself.

If the Industry fails to evolve with data, it will fail. Consumer of the future will refuse to be sold the bad advertising of today.

RISK

Lack of transparency in data use, the interruption of bad advertising, and a lack of data driven understanding pushes consumers away from brands

Brands ✕ **Consumers**

Tech
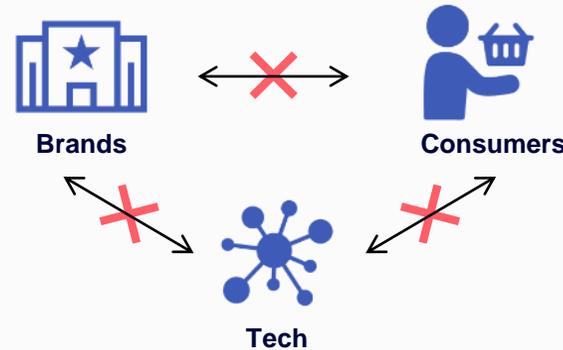
REWARD

Brands not only become data literate, but offer more transparency in the data they collect from consumers and focus more on improving the benefits they offer.

Brands **Consumers**
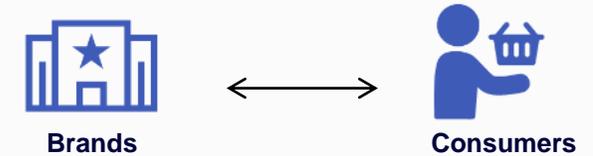
The Benefits

- Better understanding, knowledge and use of data within the Industry re-purposes the Industry perceptions
- Data ownership takes power away from Big Tech firms that have their own motives for controlling and utilising data
- The concept of bad digital advertising will be replaced with new exciting forms of Marketing communication

How to get there

- the Industry needs to start hiring data first thinkers and find ways to integrate data first process from top to bottom – expertise now counts as much as experience
- Re-think how data can be used, how to collect from consumers transparently, how to analyse internally and how to re-use in improving communications with consumers.

06

SONAR TREND
PLATFORM
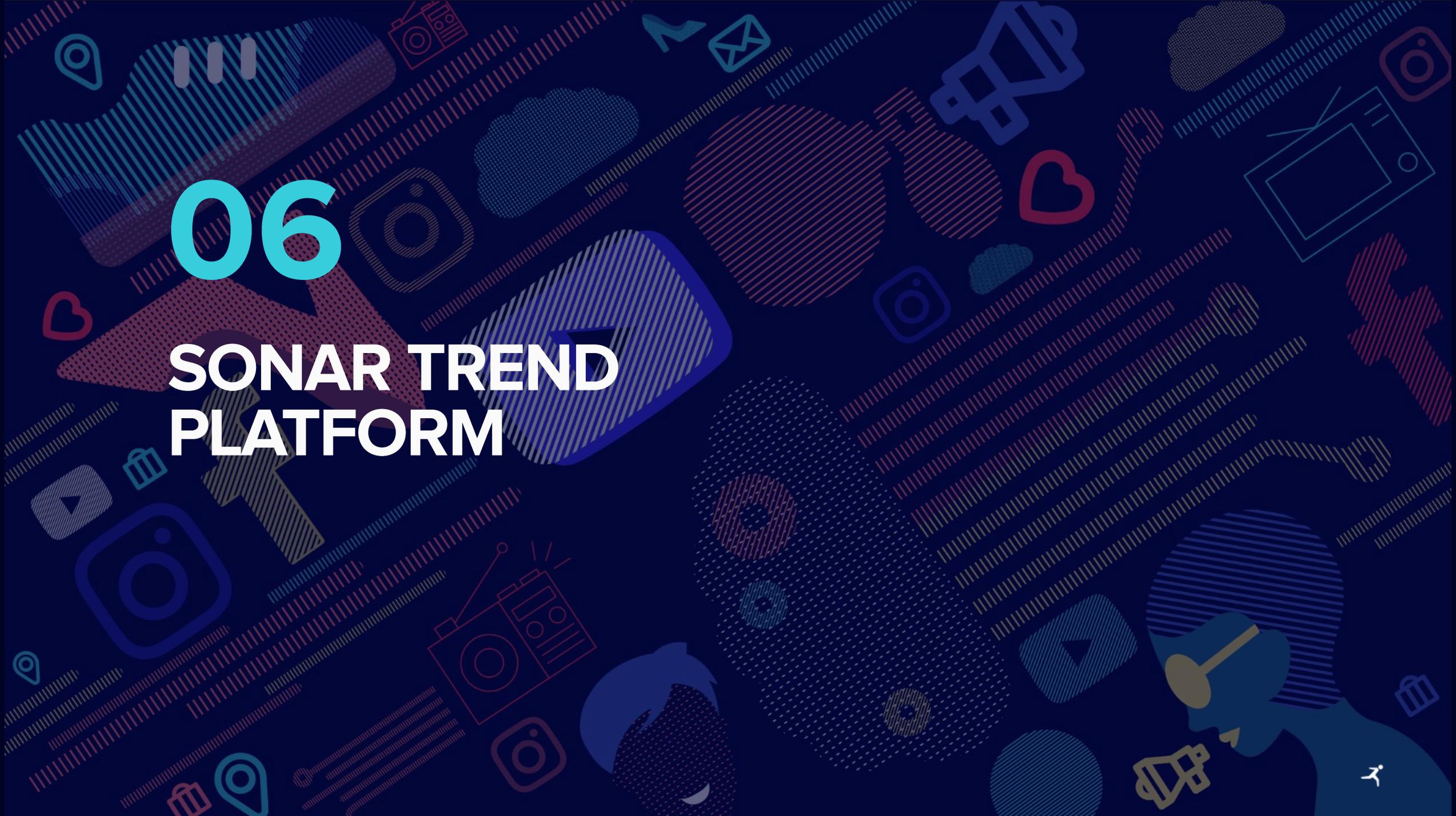
# The **SONAR** is an innovative data-driven trend sensing system supporting you to:

Quantify and rank trends >

Identify new trends and signals >

Analyse trends and access articles >
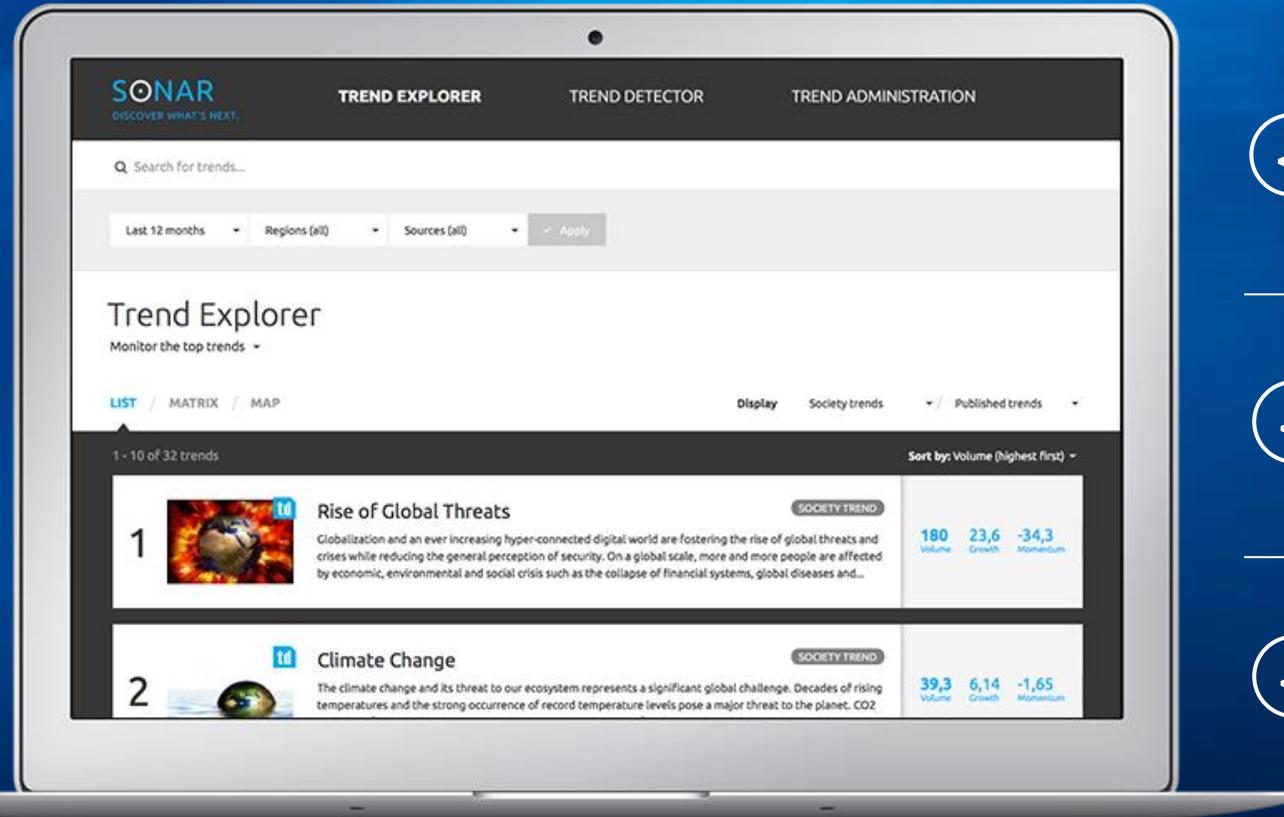
< **Discover and monitor start-ups**

< **Explore and compare trends**

< **Track innovation projects**

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THANK YOU