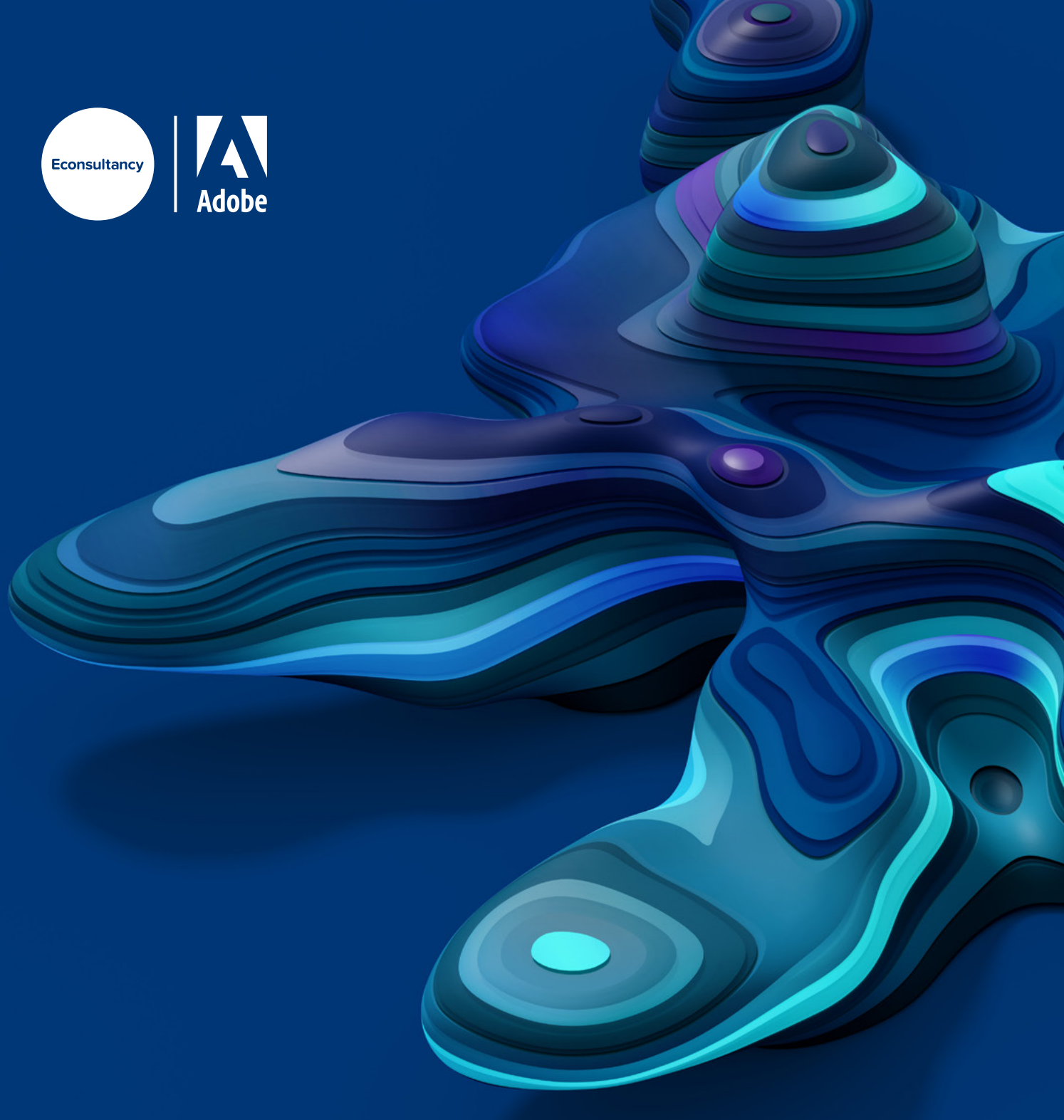




Experience Index

2019 Digital Trends: Advertising in Focus

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1. Executive summary.

The 2019 Digital Trends: Advertising in Focus report, produced by Econsultancy in partnership with Adobe, explores the key trends in advertising set to dominate the agenda over the next year.

Advertising has long been thought of as the glamorous, headline act within marketing as a whole. The digital age has brought opportunities for advertisers, but also high-profile challenges such as declining levels of consumer trust, a perceived lack of transparency in the programmatic ecosystem, and inconsistent measurement. Advertisers are looking for ways to address these challenges while continuing to benefit from what remains a highly effective discipline for creating sustained brand engagement and sales.

This report explores attitudes to technology and innovation, including how advertisers risk losing the balance between creativity and measurement, and the challenge posed by walled gardens that restrict access to data.

Advertisers embrace the potential that data-driven marketing presents. They want to be part of initiatives to drive improvements in customer experience but, to do this, they will have to examine the role advertising technology plays in the digital sphere and what good investment looks like.

Finally, advertising executives are intrigued and, in some cases, ready to make use of artificial intelligence (AI). The potential for improved targeting and speed to market is not disputed. But there are many hurdles around compliance, with data privacy regulations, data transparency, brand safety, and ad quality to address first.

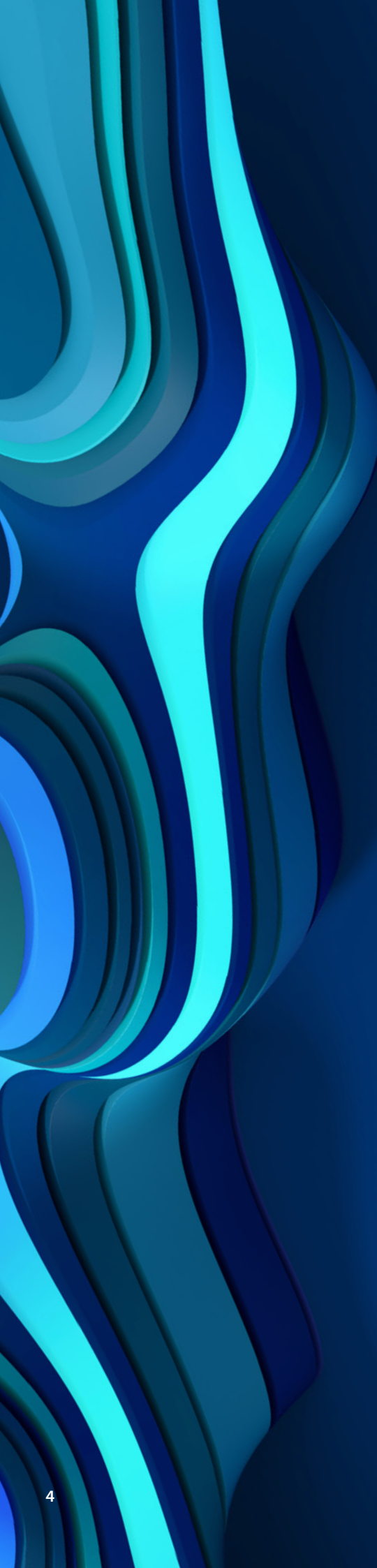
The research is based on the responses of almost 800 advertising professionals who took part in the annual Econsultancy/Adobe Digital Trends survey carried out at the end of 2018¹.

Acknowledgements

Econsultancy and Adobe would like to thank the following contributors for their insights.

- Angus Cormie, Ecommerce Director for Consumer and Small Business, Dell
- Alessandra di Lorenzo, CEO, Forward
- Chris Hirst, Global CEO, Havas Creative
- Mike Klinkhammer, Director of Advertising Sales EU, eBay
- James Keady, Director of Digital Engagement for Asia and EMEA, Citibank

¹ The 771 advertising respondents who took part in the 2019 Digital Trends survey were among a total of 12,815 marketing, creative and technology professionals in the digital industry from all sectors who participated, from countries across EMEA, North America and Asia Pacific.



2. The quest for advertising excellence.

Once hailed as the next great platform for advertising, the digital environment has become a significant challenge for advertisers in recent years. Digital advertising is still an opportunity to create highly-targeted, data-driven communications, but marketers have been hampered by the difficulty of linking the performance of their advertising to meaningful results, rather than using such flawed vanity metrics such as click and likes.

They have also found themselves unable to link all their digital channels together to allow attribution and optimization across the customer journey, and to enable them to provide the best overall advertising experience. At the same time, consumers and regulators remain suspicious of the ways in which marketers use the data they collect, compromising attempts to drive greater relevance in digital advertising.

These concerns are leading to a change in the way businesses approach marketing. Econsultancy's 2019 Digital Trends survey shows that almost two-thirds (63%) of advertising-focused respondents believe advertising is a top-three priority for their organization over the coming year (*Figure 1*). While this high ranking for advertising from advertising professionals is unsurprising, it is also noteworthy that almost half of them call out *content and experience management* (46%) and *audience and data management* (44%) as top priorities. The fact that a third of advertisers place both *analytics* (33%) and *personalization* (32%) high on the agenda shows that they are now focused not just on getting the right content or data, but on actually managing these areas to drive the best possible customer experience.

In comparison, respondents from other functions within the business regard *content and experience management* as a much higher-priority (63%) than advertising-focused executives (46%). Although they are not necessarily mutually exclusive, Alessandra di Lorenzo, CEO of Forward (Lastminute.com's media company), observes: *"Data-driven marketing is a great thing but we mustn't lose sight of the importance of creativity and correct media planning and buying, which all together form the art of marketing. It seems like we're stuck in a bit of a targeting or direct response loop. There seems to no longer be space for creativity and strategic brand advertising."*

Angus Cormie, Ecommerce Director for Consumer and Small Business at Dell, states: *"A priority for 2019 will be continuing to build the brand. Not necessarily in terms of big TV campaigns, but in terms of letting customers know what we are and what we stand for across all our channels."*

Company respondents

Figure 1: Proportion of respondents ranking these areas as top-three priorities for their organization in 2019





Almost two-thirds (63%) of ad executives rank **advertising** as one of their top three priorities, while only 26% of those in other functions say the same.

Beyond 'target at all costs'

Brands should achieve more balance with their digital marketing. Rather than the 'target at all costs' approach, they need to go back to basics and create messaging that engages. Mike Klinkhammer, Director of Advertising Sales EU at eBay, reiterates what makes a good ad: *"It's delivering the relevant message to the right user at the right point in time. That's still the big vision for advertisers and publishers alike. There are two ingredients – the technology that delivers it and the data that informs it."*

Ads needn't be engaging at the expense of effectiveness, Klinkhammer argues. *"Creativity and metrics are connected. We need to focus much more on quality and relevance – those are two key words for me this year. If you combine quality and relevance, helped by automation, you get very powerful content delivered in very effective ways."*



If you combine quality and relevance, helped by automation, you get very powerful content delivered in very effective ways.

Mike Klinkhammer

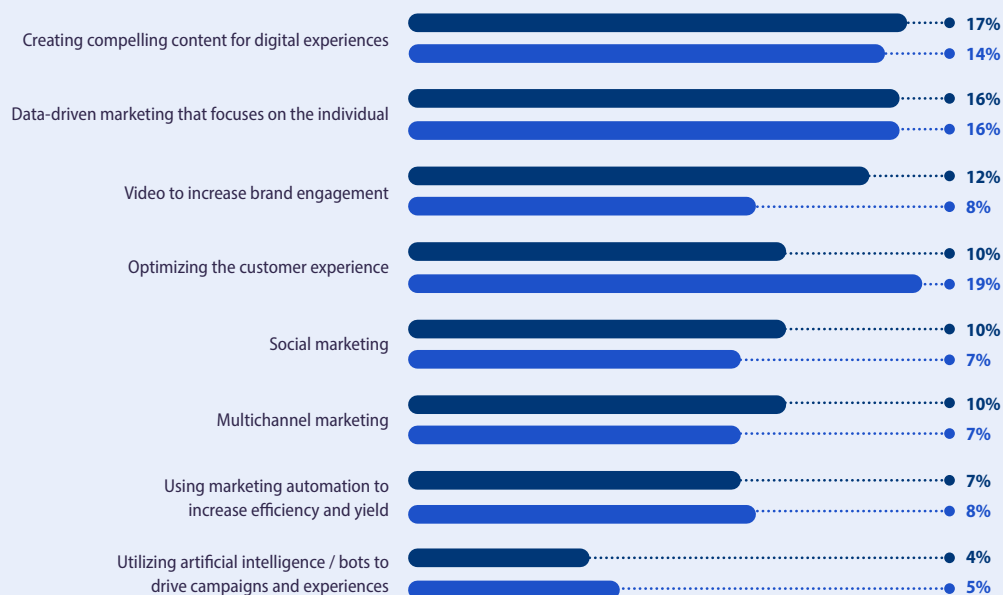
Director of Advertising Sales EU, eBay

Figure 2 shows that *creating compelling content for digital experiences* (17%) is the single most exciting opportunity for advertisers, narrowly ahead of *data-driven marketing that focuses on the individual* (16%). It is ultimately the combination of high-quality creative and effective use of data that defines advertising success.

According to Chris Hirst, Global CEO at Havas Creative and author of the new book *No Bullsh*t Leadership*: *"Smart application of creativity is the way to go. There are occasions when I want ads for a sports shoe brand to be super-sexy and engaging, but there are others when I want to solve a query about why my feet hurt from running. It's about context."*

Company respondents

Figure 2: Which one area is the single most exciting opportunity for your organization in 2019?



Advertising respondents: 134
Other respondents: 2,514

Methodology note: This chart excludes the lowest-ranking options.

● Advertising
● Other functions

Optimizing ad performance and customer experience needn't be mutually exclusive. When Vodafone announced² it was bringing its digital media buying in-house in mid-2018, its CEO had recently told shareholders that digital technology had 'profoundly changed Vodafone's strategic approach towards above-the-line advertising'. The company had launched an internal CX program in the previous financial year to improve digital customer satisfaction. It is now looking into 'smart content production' to create fast-turnaround, creative executions at low cost.

² <https://www.campaignlive.co.uk/article/vodafone-brings-digital-media-buying-in-house-pioneering-move/1486379>



Creating compelling content for digital experiences (17%) is the single most exciting opportunity for advertisers, narrowly ahead of **data-driven marketing that focuses on the individual (16%)**.

“

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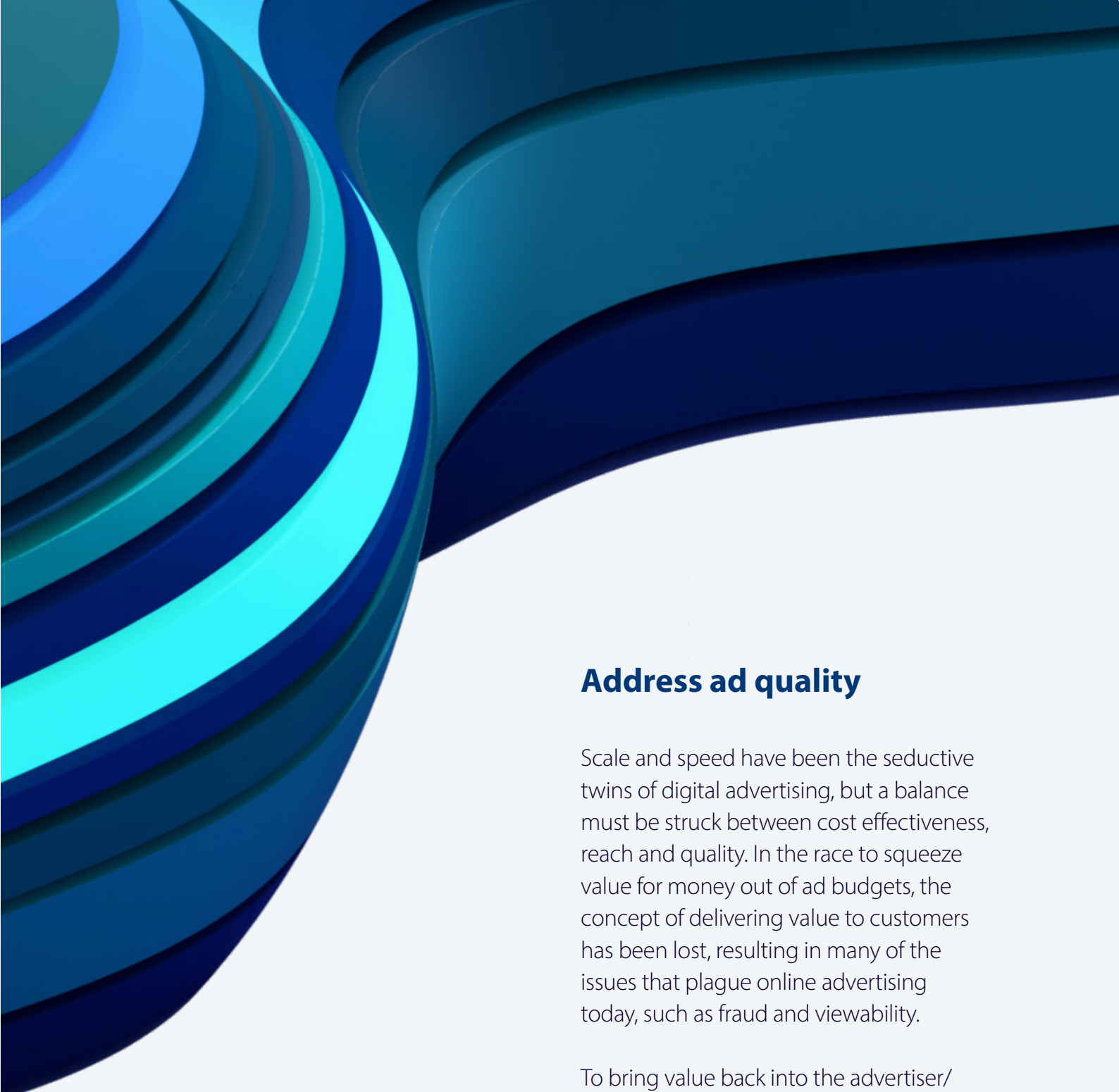
Chris Hirst
Global CEO, Havas Creative

In early 2018, a number of major advertisers came together to create a new Global Media Charter, published by the World Federation of Advertisers (WFA)³ to address some of the issues facing the industry. This involved eight principles:

1. Zero tolerance of ad fraud
2. Brand safety protection
3. Minimum viewability thresholds
4. Supply chain transparency
5. Third-party verification and measurement
6. Removal of 'walled gardens'
7. Data transparency
8. Improve customer experience

Intriguingly, points one to seven focus on the nuts and bolts of digital advertising. These are also principles that you would think were by now adhered to as a matter of course. They relate to honesty, fair dealing and, quite simply, doing the job properly. It reflects the number of hurdles advertisers must get through before they can consider the eighth point – improving customer experience.

³ <https://www.wfanet.org/news-centre/globalmediacharter/>



Address ad quality

Scale and speed have been the seductive twins of digital advertising, but a balance must be struck between cost effectiveness, reach and quality. In the race to squeeze value for money out of ad budgets, the concept of delivering value to customers has been lost, resulting in many of the issues that plague online advertising today, such as fraud and viewability.

To bring value back into the advertiser/customer relationship, marketers must go back to basics and think about what constitutes the right message, where it should be delivered and at what moment. Aiming for high-quality inventory raises the bar creatively. There's no need to sacrifice control over spending but take charge of both the message and the medium for the greatest impact.

3.

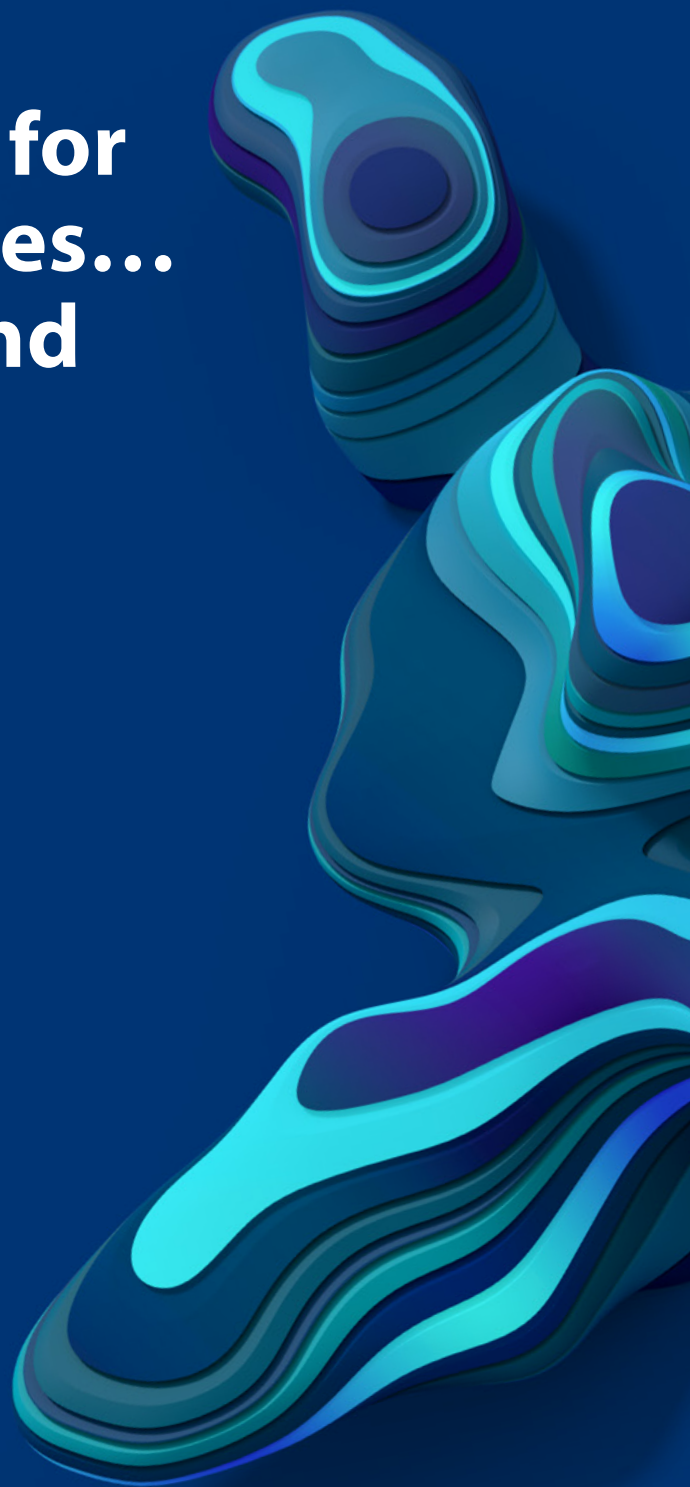
Harnessing data for better experiences... and to understand advertising ROI.

Consumers are a never-ending paradox for advertisers. To steal an analogy from Goldilocks, they want personalized ads based on their data, but they also want advertising that is neither too creepy, nor too vague, too detailed or too wide of the mark. It has to be 'just right'.

Just right means harnessing data to deliver value. Spotify used consumer data to serve individual listeners with a personalized microsite based on their own listening data. The music streaming site also capitalized on the insights those microsites delivered to inform a subsequent campaign across 18 markets, creating ads with straplines such as: "2018 goals: Be as loving as the person who put 48 Ed Sheeran songs on their 'I Love Gingers' playlist."⁴

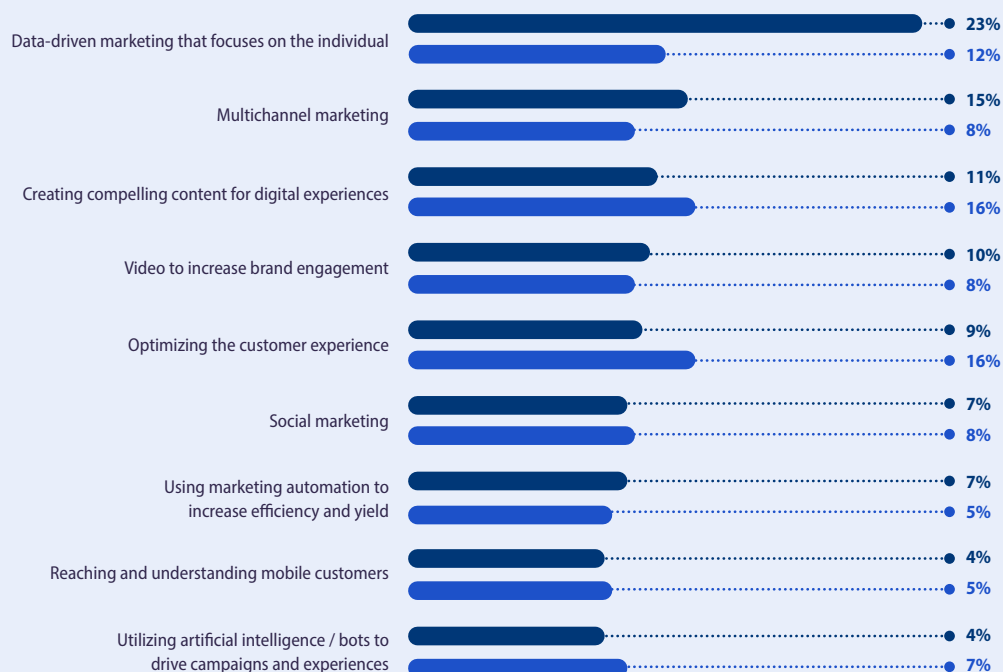
Hirst agrees that data-based marketing can produce stunning campaigns: *"There is all this opportunity with so much data and microtargeting and programmatic and technology that lets me target people like never before – but it's incredibly difficult to do this well."*

⁴ <https://blog.globalwebindex.com/campaign-of-the-month/spotify/>



Agency respondents

Figure 3: Which one area is the single most exciting opportunity for your clients in 2019?



Advertising respondents: 323
Other respondents: 2,584

Methodology note: This chart excludes the lowest-ranking options.

● Advertising
● Other functions

Advertising agency respondents continue to have confidence in data-driven marketing and nearly a quarter cite it as the single most exciting opportunity for their clients in 2019 (23%, *Figure 3*). For supply-side respondents working in other disciplines, data-driven marketing (12%) falls behind customer experience optimization (16%) and creating compelling digital content (16%), though it is still the third most exciting opportunity.

James Keady, Director of Digital Engagement for Asia and EMEA at Citibank, explains why it is a priority for the bank: *"Data-driven marketing growth will continue into 2019. It's not unique to banking, people expect brands to have a bespoke relationship with them. From entry-point millennials to retained high net worth clients, they may have different needs but increasingly expect the relationship to be personalized. Customers don't care about the complex data engine back-ends, they just want it to be easy and relevant."*



Advertising agency respondents cite **data-driven marketing** as the single most exciting opportunity for their clients in 2019 (23%).

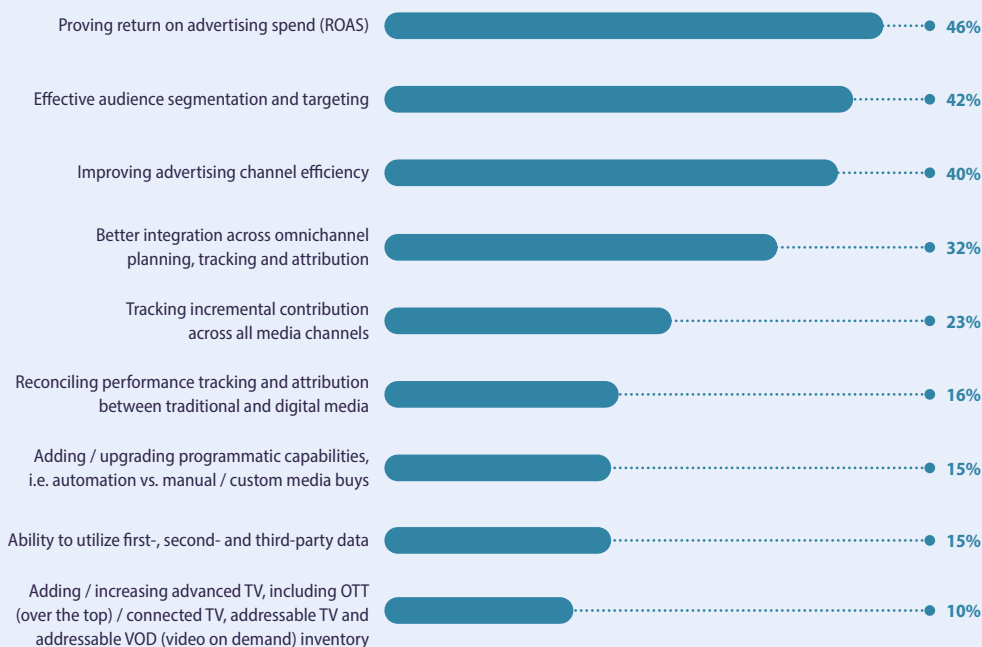
Dell's Cormie agrees that personalization is a fruitful area of focus: *"Personalization is a big investment area for us. Every time we run a personalization campaign we get a good payback. It's one of the single biggest ROI investment areas that we make."*

But while advertisers hone their targeting skills, the need to show value for money is becoming ever more pressing. Figure 4 shows that *proving return on advertising spend (ROAS)* trumps *effective audience segmentation and targeting* by four percentage points at the top of a list of advertising priorities (46% vs. 42%). Notably, *improving advertising channel efficiency* (40%) is in third spot, emphasizing the focus on demonstrable performance.

“Personalization is a big investment area for us. Every time we run a personalization campaign we get a good payback. It's one of the single biggest ROI investment areas that we make.

Angus Cormie
Ecommerce Director for Consumer and Small Business, Dell

Figure 4: Which three advertising-related areas do you expect to jump furthest up your organization's (or your clients') priority list in 2019?



Respondents: 412

Methodology note: This chart excludes the lowest-ranking options.

Return on investment is a perennial challenge for marketers. Many of the effectiveness metrics in digital rely on the point of conversion for measurement results. UK-based fashion retailer Next⁵ diverted investment away from TV to online because it focused on the 'internal rate of return', calculated from net cash flows from each campaign. However, marketing professor and commentator Mark Ritson believes⁶ campaigns are less effective because of that focus on ROI. This is because concentrating on conversions or clicks focuses on short-term payback, to the exclusion of the long term, to the ultimate detriment of the company.

The ability to justify ad spend is going to be increasingly important over the next year and beyond, and there are two elements to the problem. The first is that no ad is either entirely brand building or entirely direct response. However, as Ritson implies, concentrating on the click means you're not measuring any brand building that might be going on. The second is that, as most brands look to move away from last-click wins, it's still tricky to say what might replace it.

"Modelling for attribution is still in its infancy. ROI models are getting better but being able to attribute a sale is not a trivial thing. Before testing new formats, I would highly recommend that we look into attribution of formats and channels," warns Forward's di Lorenzo.

Cormie explains that focusing on the performance of the individual ad channel is not necessarily the yardstick required: *"We have to think of both the consideration and purchase parts of the journey, and make sure we have the analytics in place. We have to make sure we're measuring the right thing at the right point in the journey to help us make good decisions."*

⁵ <https://www.marketingweek.com/2018/12/12/marketing-trends-2019-effectiveness-over-efficiency/>

⁶ <https://www.marketingweek.com/2018/10/30/marketing-efficiency-versus-marketing-effectiveness/>

“

Modelling for attribution is still in its infancy. ROI models are getting better but being able to attribute a sale is not a trivial thing. Before testing new formats, I would highly recommend that we look into attribution of formats and channels.

Alessandra di Lorenzo
CEO, Forward

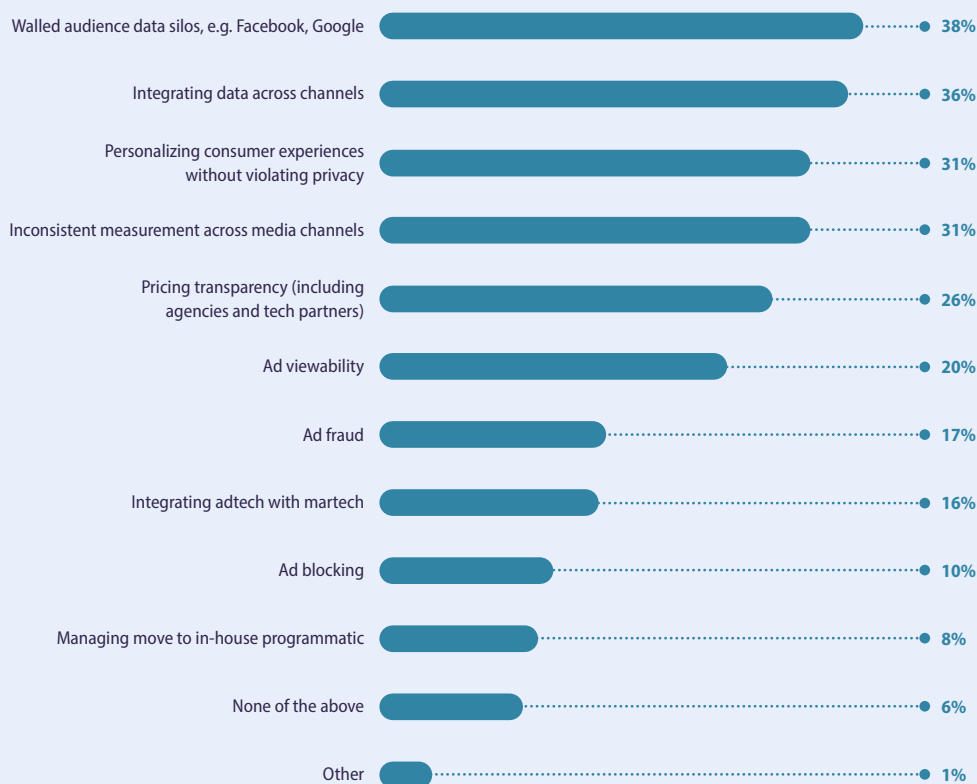
Walled gardens: two become three

The nagging sense that advertisers are not in receipt of all information endures, exacerbated by the growing hold the two major players have on a large amount of publisher inventory. Spending overall on online ads is still growing but 90% of all growth goes to Google or Facebook.⁷ Amazon, too, is taking a share of the pie, reporting that it generated \$2.2bn from ad revenue in a single quarter in 2018, twice as much as the year before.

Forward's di Lorenzo admits there is a triumvirate in control of the landscape – but that this might not be a bad thing. *“I would add Amazon to the duopoly of Google and Facebook. They are trying to simplify the world by taking all the innovations in and giving advertisers machine-led tools and targeting capabilities that many traditional publishers are not going to be able to offer.”*

⁷ <https://adexchanger.com/online-advertising/digital-ad-market-soars-to-88-billion-facebook-and-google-contribute-90-of-growth/>

Figure 5: Which of the following are the top three advertising-related challenges most likely to keep you (or your clients) awake at night?



Respondents: 383

Our survey of advertisers found that walled audience data silos (38%) are the single biggest challenge most likely to keep them awake at night (*Figure 5*). However, there is little sign that individual advertisers are prepared to take on the might of Facebook, Google and Amazon. According to eMarketer predictions from early in 2019, the market shares of Google and Facebook will drop slightly this year, although their revenues from digital advertising will increase as the size of the market increases. By contrast, eMarketer expects Amazon's share of the market to double this year, to 8.8%.

Perhaps the issue for advertisers is not that the walled gardens operated by Google, Facebook and Amazon limit access and prevent insight, but that they are another type of ad platform that needs to be managed in a certain way.

Klinkhammer proposes: *"Walled gardens present a problem for advertisers because they can't use an overarching advertising strategy that includes those walled gardens. They need a specific strategy for walled gardens, then a different one for everything else."*

“ Walled gardens present a problem for advertisers because they can't use an overarching advertising strategy that includes those walled gardens.

Mike Klinkhammer
Director of Advertising Sales EU, eBay

"At eBay, we are in a somewhat stronger position because we have very deterministic data that helps inform advertisers with better insight to optimize their media investments. Transparency is what the market demands so we are trying to be much more transparent using our first-party data to help advertisers better understand their users and help them make smarter investment decisions," he adds.



Walled audience data silos (38%) are the single biggest challenge most likely to keep advertising professionals awake at night.

The effect of GDPR

Tightening-up of data regulations should also drive a better overall approach to using data for targeting, whether through the likes of Google and Facebook, or a wider publishing network. Advertisers are more likely than their peers to believe that the increased focus on consumer data protection has had a positive impact on their organization (41% vs. 37%, *Figure 6*).

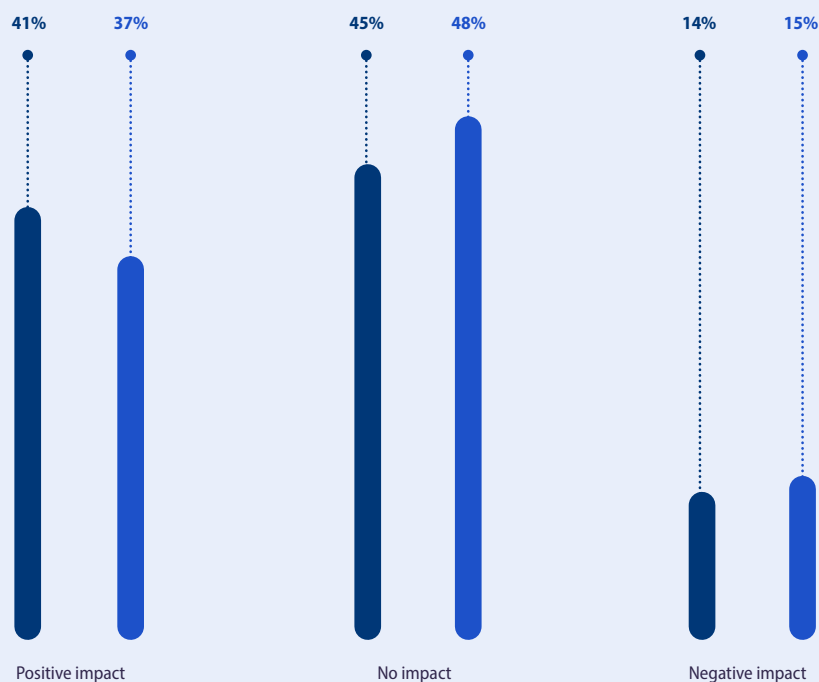
GDPR requires brands to be more responsible and accountable for how they manage the data they collect about their customers. Then, a few months after the regulation came into effect in May 2018, Ad Week suggested that it was 'course-correcting' the digital ad world. From cleaning up databases and maximizing the use of their first-party data, to moving away from targeting based on data from third parties, the conversation has centered around

the regulation acting as a spur to creativity and innovation. It has also been suggested that contextual advertising would make a comeback, creating ad experiences that are both relevant and entertaining without relying on audience data – getting around the challenge of walled gardens at the same time.

Di Lorenzo argues that a combination of clean data, creative execution and publishers who focus on providing premium inventory will be a triple threat to lowest common denominator ad tactics: *"GDPR is on top of [quality inventory]. Once we have inventory that is clean and fully opted-in with high viewability, then that inventory should be paid for at a premium."* Klinkhammer adds: *"GDPR was the first step to regaining that trust again. It helped the industry overall to take steps in the right direction."*

Company respondents

Figure 6: What impact has the increased focus on consumer data protection (e.g. the EU's GDPR) had on your organization?



Advertising respondents: 104
Other respondents: 3,423

● Advertising
● Other functions



Use data to shine a light on CX

Customer centricity forced brands to move their focus away from product specifications to customer benefits. Customer experience should be driving advertisers to design and measure campaigns by the impact they have on the end user, rather than on channel-by-channel performance.

This is difficult as we wean ourselves off the clear but ultimately unhelpful last-click attribution model to more sophisticated but underutilized modelling. But by focusing on the needs of the customer and using data to design interesting and engaging campaigns, and then measuring their success by their impact on customer journey rather than platform, marketers and advertisers will begin to see greater campaign effectiveness, and better ways of analyzing it.

4. Use of AI in advertising.

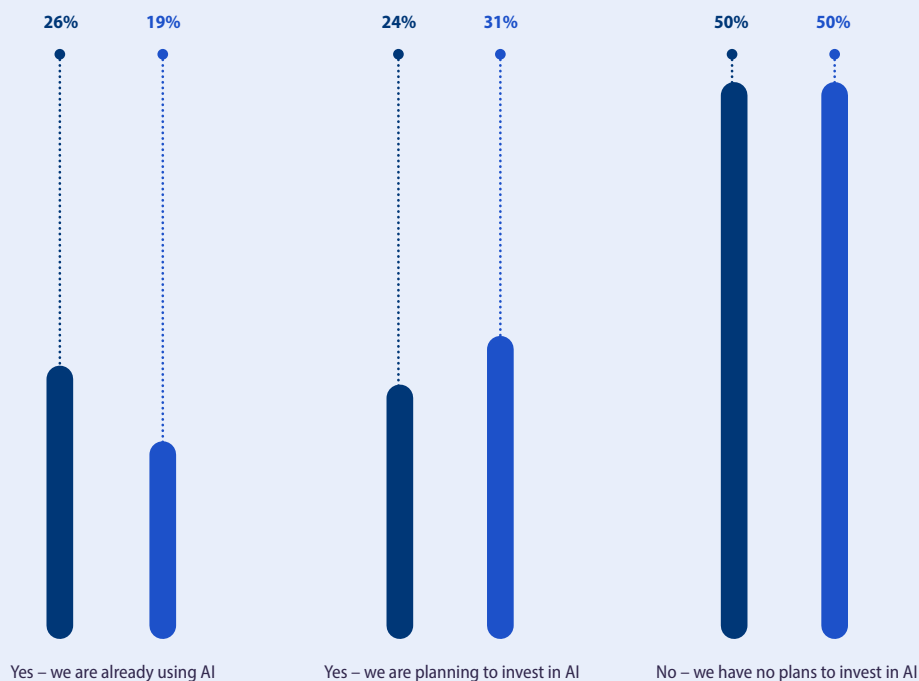
Advertising's use of AI remains contentious, but only because it is a contentious subject across the whole of marketing. Recent research from venture capital firm MMC found that, of the start-ups claiming to offer AI-based solutions, only 60% actually did so⁸. That said, advertising as a discipline seems to regard itself as further down the road than other functions when it comes to integrating – or wanting to integrate – AI solutions.

Those working in advertising are 37% more likely than their peers to say that their companies are using AI (*Figure 7*). They are also ten times more likely to believe that advertising is leading the way, with 40% saying that advertising teams are making the most use of AI and machine learning (compared to 4% of their peers). Meanwhile, more than half (55%) of advertising respondents point to the use of AI in programmatic, compared to only 18% of those in other business functions.

⁸ <https://www.theverge.com/2019/3/5/18251326/ai-startups-europe-fake-40-percent-mmc-report>

Company respondents

Figure 7: Is your organization using or planning to invest in artificial intelligence (AI) in 2019?



Advertising respondents: 112
Other respondents: 3,486

● Advertising
● Other functions

L'Oréal Canada has been integrating chatbots within Facebook Messenger since 2017 but announced in February 2019 that it would expand outside of Facebook⁹. L'Oréal expects to be able to interact with customers through display ads and reach around one billion websites. The AI engine will offer skin diagnostics and provide product recommendations, explanations and dermatological advice.

Dell's Cormie admits to exploring AI as a function of marketing and delivering on customer experience: *"We are asking ourselves what the future is in terms of marketing automation, AI capability and other technologies like cloud, and whether now is the right time to invest."*

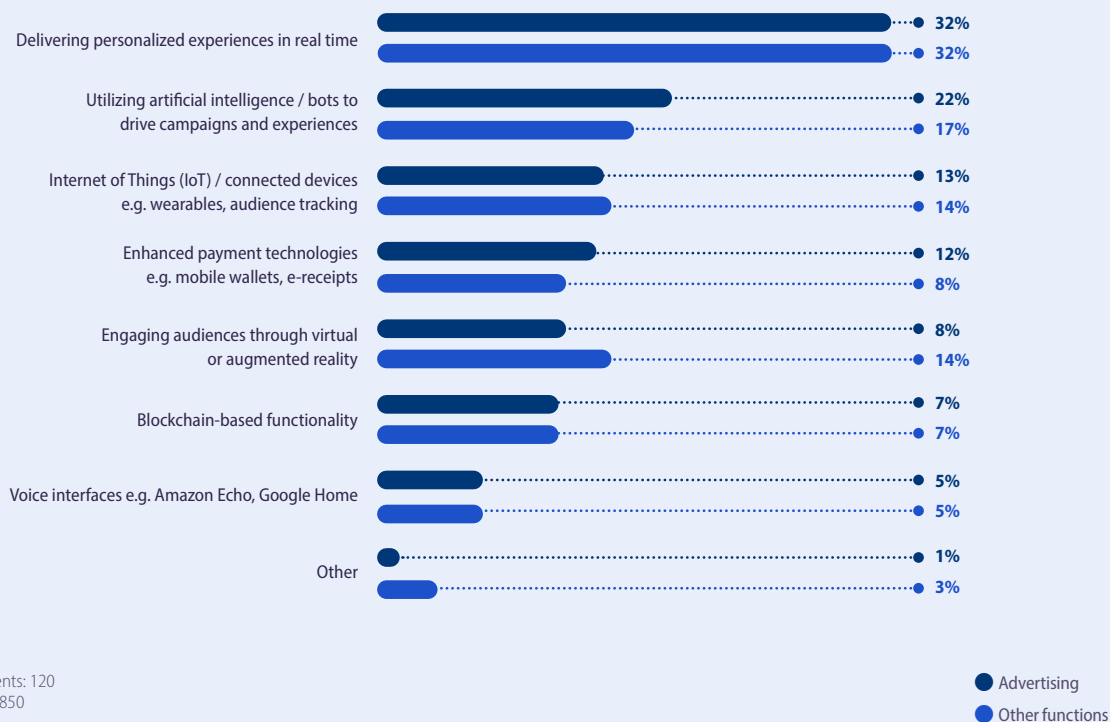


Those working in advertising are ten times more likely than their peers to believe that their function is **leading the way in use of AI and machine learning** (40% vs. 4%).

⁹ <https://www.glossy.co/beauty/loreal-canada-expands-ai-ambitions-through-online-advertising>

Company respondents

Figure 8: Looking ahead, which of these do you regard as the most exciting prospect in three years' time?



AI's potential to address the scale and variety of audiences that brands want to reach is unparalleled. *"AI will have a massive impact on the entire industry. When you have a wide range of data signals that can help you profile audiences – like eBay which has 50% reach in the online market – that is where technologies like machine learning can really add value. They can find the correlations between audiences that the human mind can't,"* says eBay's Klinkhammer.

Considering the early warning that technology has previously been used at the expense of creativity and good communications, he adds: *"The most promising area is going to be in delivering better ads. The right message at the right time enhances customer experience. The right technology is the enabler and it doesn't disrupt the experience. It's additive."*

Some do advise that exploring AI may be a case of advertisers running before they can walk. While the targeting potential is indeed seductive, the use cases must be in place – as does the capability.

“ The most promising area is going to be in delivering better ads. The right message at the right time enhances customer experience.

Mike Klinkhammer
Director of Advertising Sales EU, eBay

“Creating correlations between datasets starts with humans and machines can enhance that. Sometimes it can be a simple thing that makes campaigns very effective.

Alessandra di Lorenzo
CEO, Forward

“We haven’t even cracked mobile. Now there are all sorts of things across mobile, social, influencer, ad formats and out of home. We’re bombarded by options and you can’t experiment with something new every week,” di Lorenzo warns, adding: “Creating correlations between datasets starts with humans and machines can enhance that. Sometimes it can be a simple thing that makes campaigns very effective. We’re not getting the basics right at the moment. We shouldn’t be showing irrelevant ads to people.”

It is likely that advertising as a discipline has more of an understanding of how data and technology can enhance marketing tactics than other functions. There have been high-profile teething problems with obsessive retargeting and data misuse but with increasing regulation, guidelines and best practices to follow, these issues should eventually be ironed out.

AI will continue to stretch the boundaries of what is currently possible, such as delivering personalization at scale and in real time (Figure 8), but also continuing to subvert what advertising looks like and the expected channels it uses. Nearly a quarter (22%) of advertisers and 17% of their peers see bots driving both campaigns and experiences in the medium-term future.

In 2018, ASOS announced¹⁰ that it was handing over 2% of the revenue it would normally allocate to advertising to voice search and AI to attract customers. It launched its own chatbot, Enki, as well as creating a voice shopping tool on Google Home. It’s also using AI in visual search. Style Match uses customers’ existing pictures to find styles they might like as well as the ASOS Board, using AI to suggest mood boards that people might enjoy.

¹⁰ <https://www.thedrum.com/news/2018/10/18/asos-reduces-ad-spend-here-s-where-it-s-investing-instead>

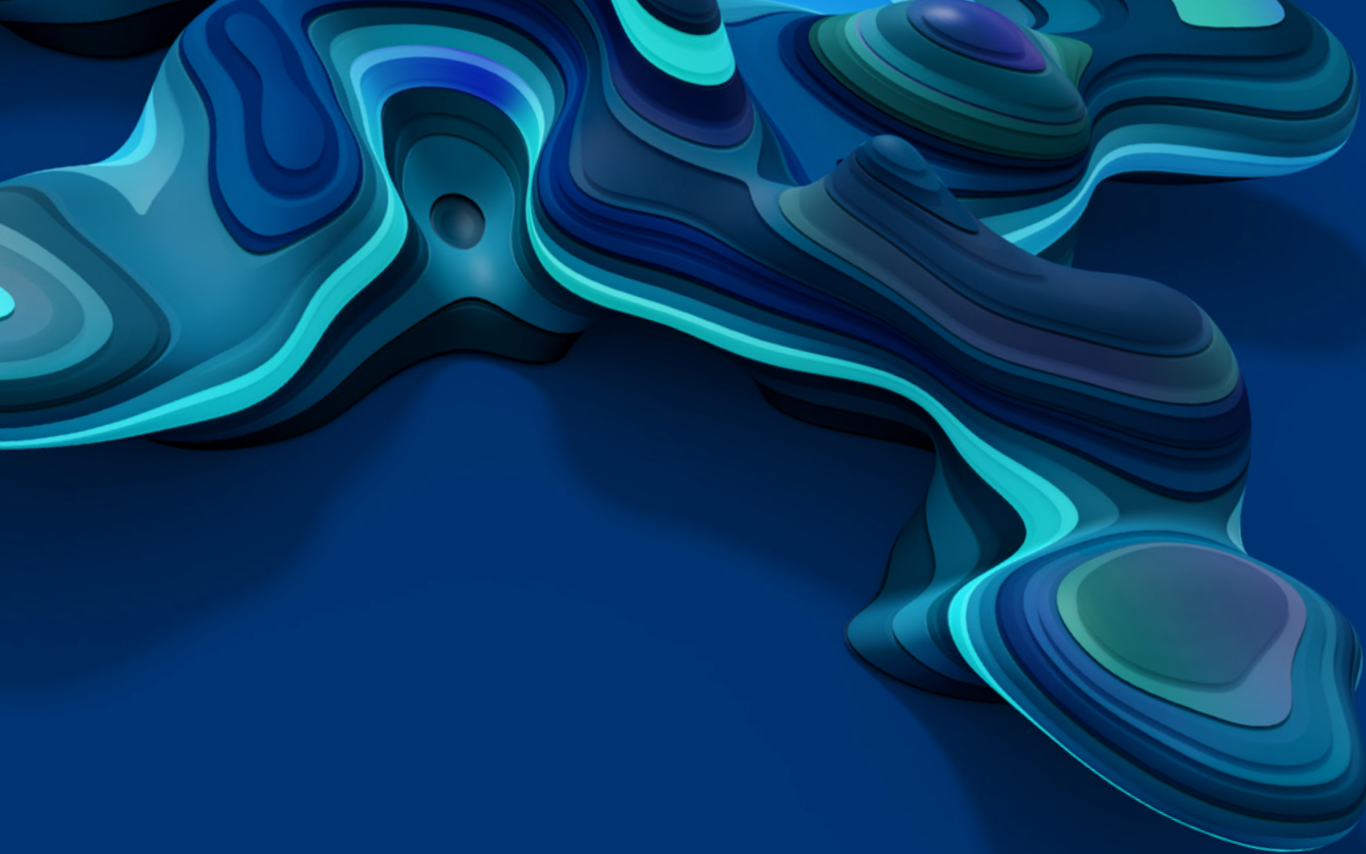


Just under a third (32%) of advertisers believe that **delivering personalized experiences in real time** is the most exciting prospect in three years’ time.

Approach AI with caution

There are undeniable benefits to introducing automation, machine learning and AI into the advertising process. Having learned from the early mistakes of programmatic (slush inventory, brand safety issues, over-frequent targeting), it should be possible to put the insights and real-time personalization capabilities to work to create better ads overall.

But not every organization is ready to use AI-based solutions well. It is much more effective to go back to basics and get copy, placement, platform and message right before embarking on what is a resource- and expertise-hungry tactic. There are many incremental gains to be had from tidying up what you already have before engaging with cutting-edge technology. It is the way forward and it would be foolhardy not to experiment at all, but companies must recognize their current limitations and work towards erasing those before plunging in.



5. Conclusion.

In some ways, digital advertising remains the same as all advertising; a matter of putting the right message in front of the right person at the right time. At the same time, digital technology has changed everything, and continues to do so.

In recent years, digital advertising has been dominated by bottom-of-the-funnel retargeting activity, at the expense of consumer patience and long-term brand building. The promise of the next few years is that technology will start to link up all the touchpoints across individual customer journeys. This should start to allow advertisers to improve the personalization of their communications and make them more relevant, as well as demonstrating the value of creating awareness and building brand.

There are, however, significant barriers. The technology, increasingly powered by AI, is improving all the time but many companies have not yet begun to implement it. Data is the key element of personalization, but advertisers are being denied access to the full picture by the restrictive behavior of the big walled gardens – Google, Facebook and Amazon. Finally, the jury is still out on the effectiveness of digital advertising. Advertisers are under increasing pressure to prove return on their spending, and the investment required to realize the promises of the technology hinges on that proof.

None of these barriers are unsurmountable, and our research shows that advertisers are well aware of the challenges they face. How those challenges are addressed will be of crucial interest as 2019 plays itself out.



About Econsultancy

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and ecommerce through research, training and events.

Founded in 1999, Econsultancy has offices in New York, London and Singapore.

Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and elearning – all focused on helping individuals and enterprises get better at digital.

The subscription is supported by digital transformation services including digital capability programs, training courses, skills assessments and audits. We train and develop thousands of professionals each year as well as running events and networking that bring the Econsultancy community together around the world.

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By focusing on brand safety, improving transparency and leveraging the full power of Adobe Creative Cloud and Adobe Experience Cloud, our platform enables advertisers to gain greater control of their global advertising spend and achieve their business objectives.

The platform already manages over \$3 billion in annualized ad spend on behalf of more than 1,000 global clients, including Allstate, Ford, Johnson & Johnson, Kraft, Liberty Mutual, L'Oréal, MGM, Nickelodeon and Southwest Airlines.

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