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Basis[®]
Technologies

2023 TRENDS

Digital Sea Change

AN ERA OF PIVOTS FOR DIGITAL ADVERTISING



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VP, Media Innovations + Technology



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Media Innovations + Technology Manager

The Advertising Industry Is Recalibrating. ⌚

■ We are exiting an era of ease, newness and novelty and moving into the unknown, unpredictable, unfamiliar.



A blurred crowd of people walking in a modern, brightly lit space, possibly a transit hub or office lobby. The image is overlaid with a dark blue and purple gradient and a grid pattern. A white dotted border with an 'X' icon is in the top left corner.

TREND 1

Reaching Audiences in the Future

AUDIENCES IN THE FUTURE

We're Living in the Cookieless Future, Now

50%–60%

of signal fidelity from 3P identifiers are already lost
- IAB 2022 State of Data

Disabled Identifiers

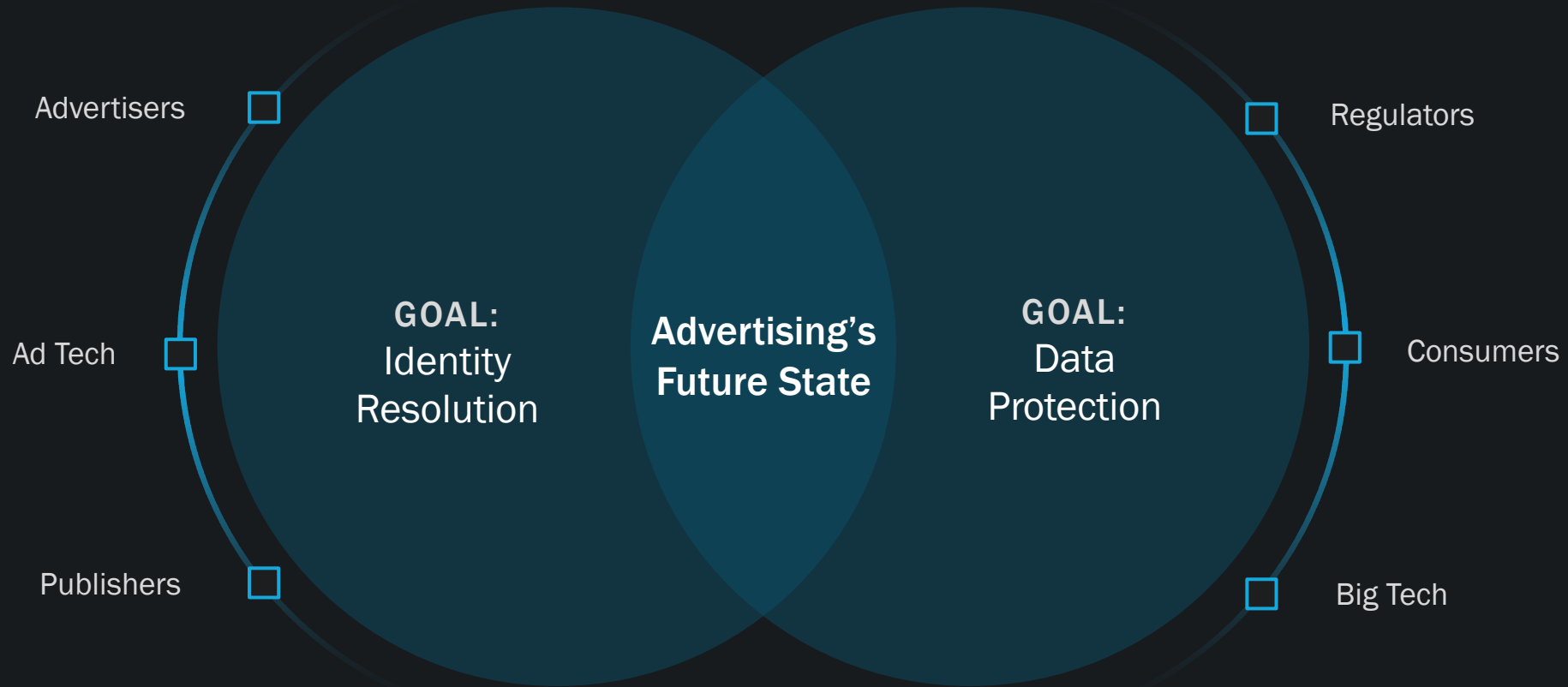
Audience Targeting

Consumer Privacy Demands

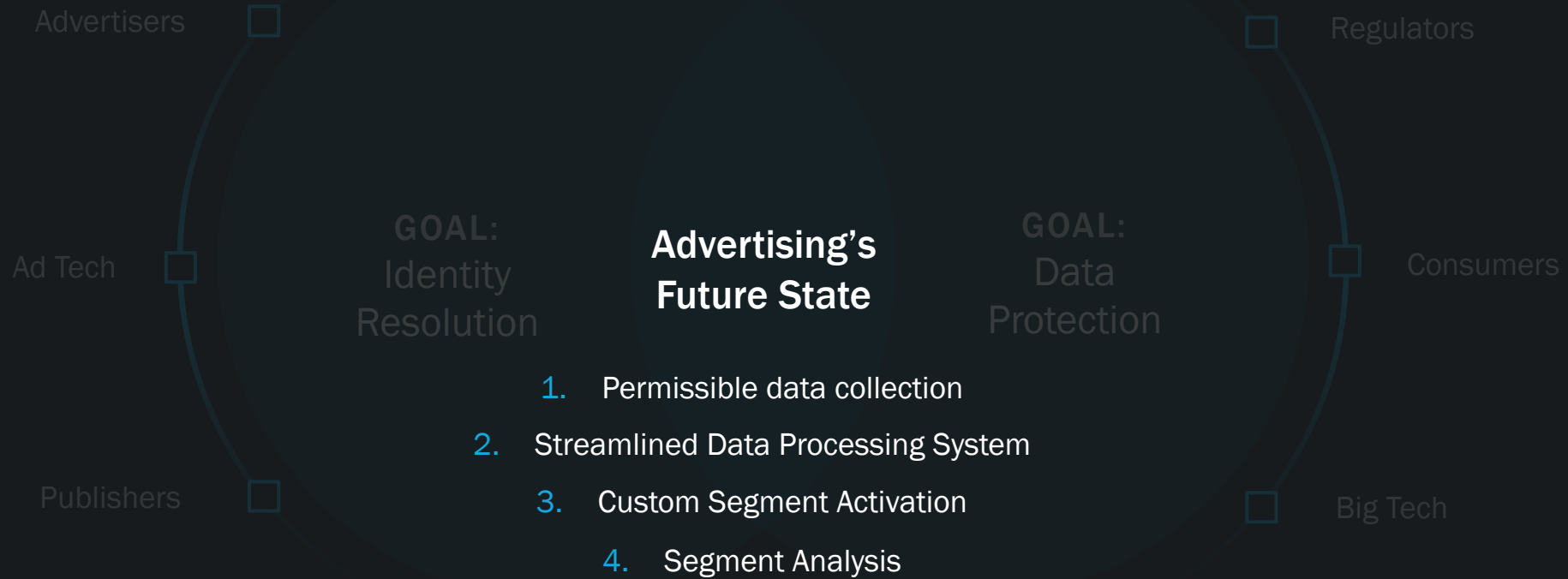
Measurement + Attribution

Data Privacy Laws

The Future of the Industry Relies on all Stakeholders



The Future of the Industry Relies on all Stakeholders



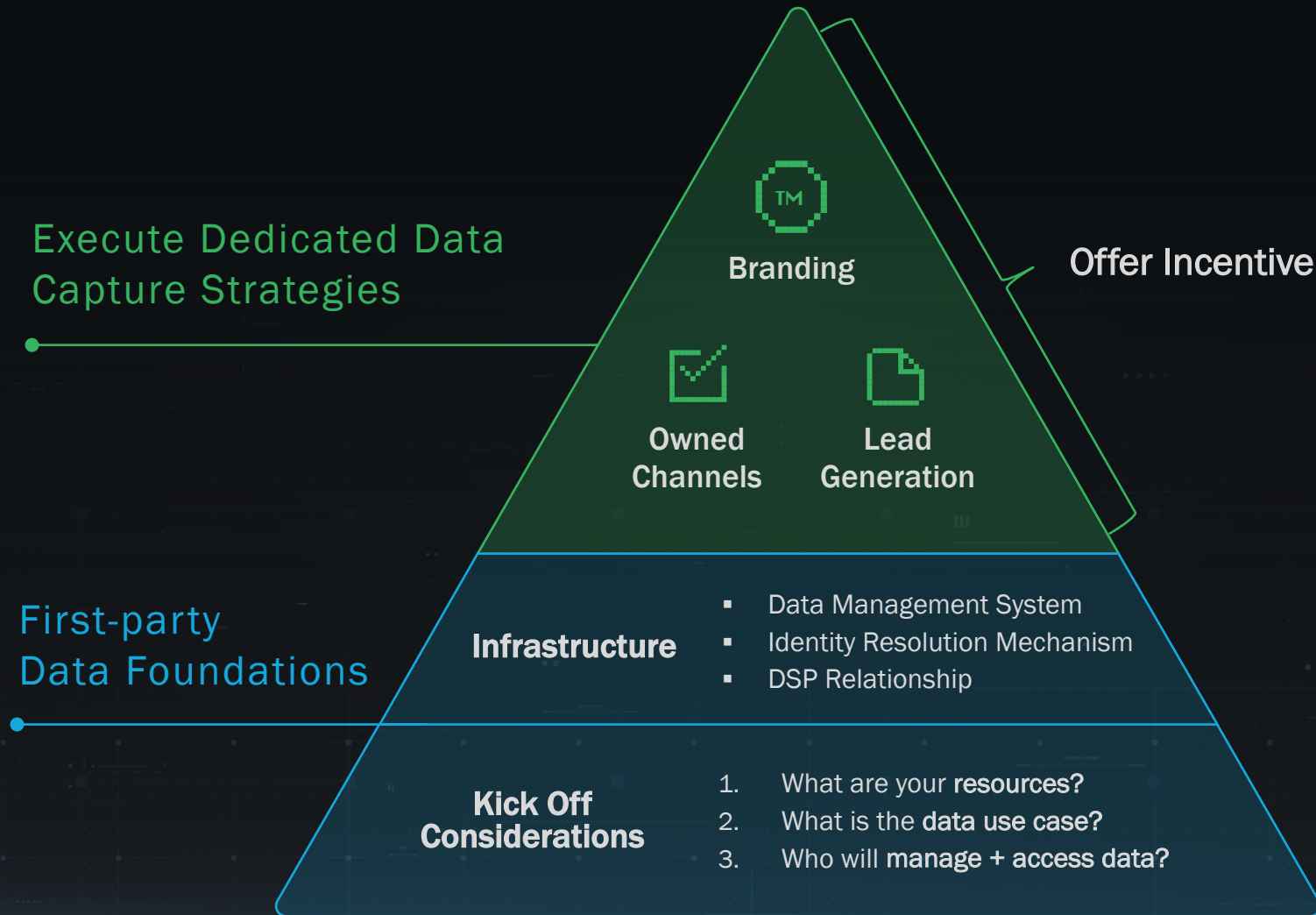


ADVERTISERS' CATCH-22

“If data is available in principle, it is hardly available in readily refined and useable form.”

Daniel Knapp – Chief Economist, IAB Europe

The First-Party Data Conversation is Oversimplified



What Else We Miss in the Data Targeting Dialogue

THERE'S A LOT OF OPTIONS

2P DATA IS ON THE RISE

Retail Media Networks,
Seller Defined Audiences
are sources of 2P data

CONTEXTUAL GOES BEYOND THE WEBPAGE

Contextual targeting
encompasses both content
and environmental cues

AI AUTOMATES AUDIENCES

AI analyzes digital journeys
to understand the
underlying behaviors

Measurement + Attribution is a Work in Progress

DATA CLEAN ROOMS

Multi-dimensional solution for data collaboration
Siloed systems, restricted interoperability
Resource intensive, require advanced technical skill

MIXED MEDIA MODELING

Data inputs must be accurate + high volume
Requires heavier time investment
Modeling results are directional

SERVER TO SERVER CONNECTIONS

Requires user to click on ad to trigger ID
Supplementary to pixel-based tracking
Conversion tracking isn't browser-dependent

Takeaways



Ad signal reduction is real



Secure data collection resources



Execute data capture strategies

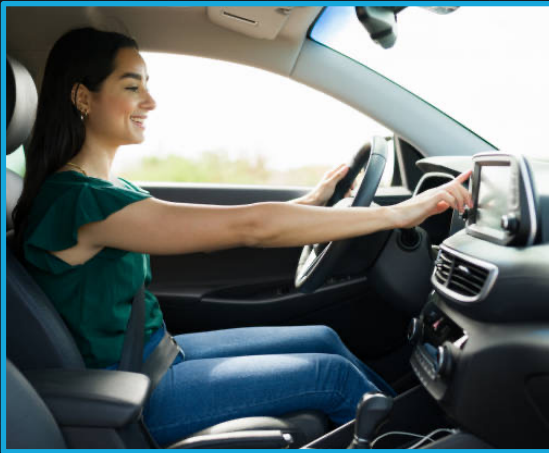
TREND 2

Speed of Sound



SPEED OF SOUND

Surround Sound: We Engage With Audio Everywhere



7:00 AM

Commuting + Podcasting



8:00 AM

At Work Focus Mode



5:00 PM

Post-Work Workout Zone



7:00 PM

Dinner Party Soundtrack

73%

of listeners use audio differently depending on where they are, who they're with, and what they're doing

Audio Primes Consumers for Brand Engagement

+23%

Engagement



+25%

Emotional Intensity



+28%

Detail Memory



93%

of brain engagement with music
content transferred to ad
engagement

30%

lift in brand recall when voicing a
brand's name back to a smart
speaker

Consumers are Captivated with Digital Audio

96% OF AMERICANS

ages 13+ listen to some form of audio daily

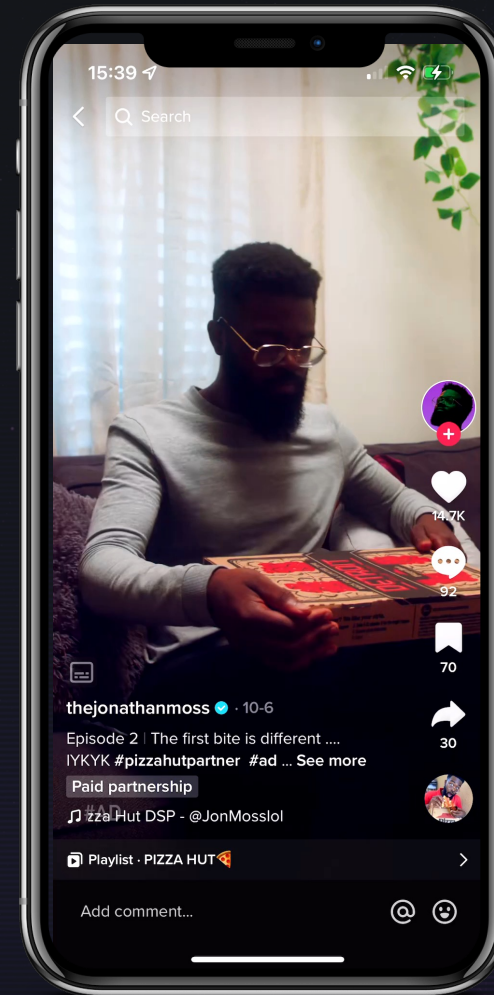
3 HOURS PER DAY

are being spent with streaming audio –
75% of that time is ad supported



Sonic Branding Cements Memorability

Brands should be **heard** as much as they're **seen**.



Sound Creates
Cross-Channel Synergy



From Tapping to Talking



Tasks requested on a smart speaker increased from

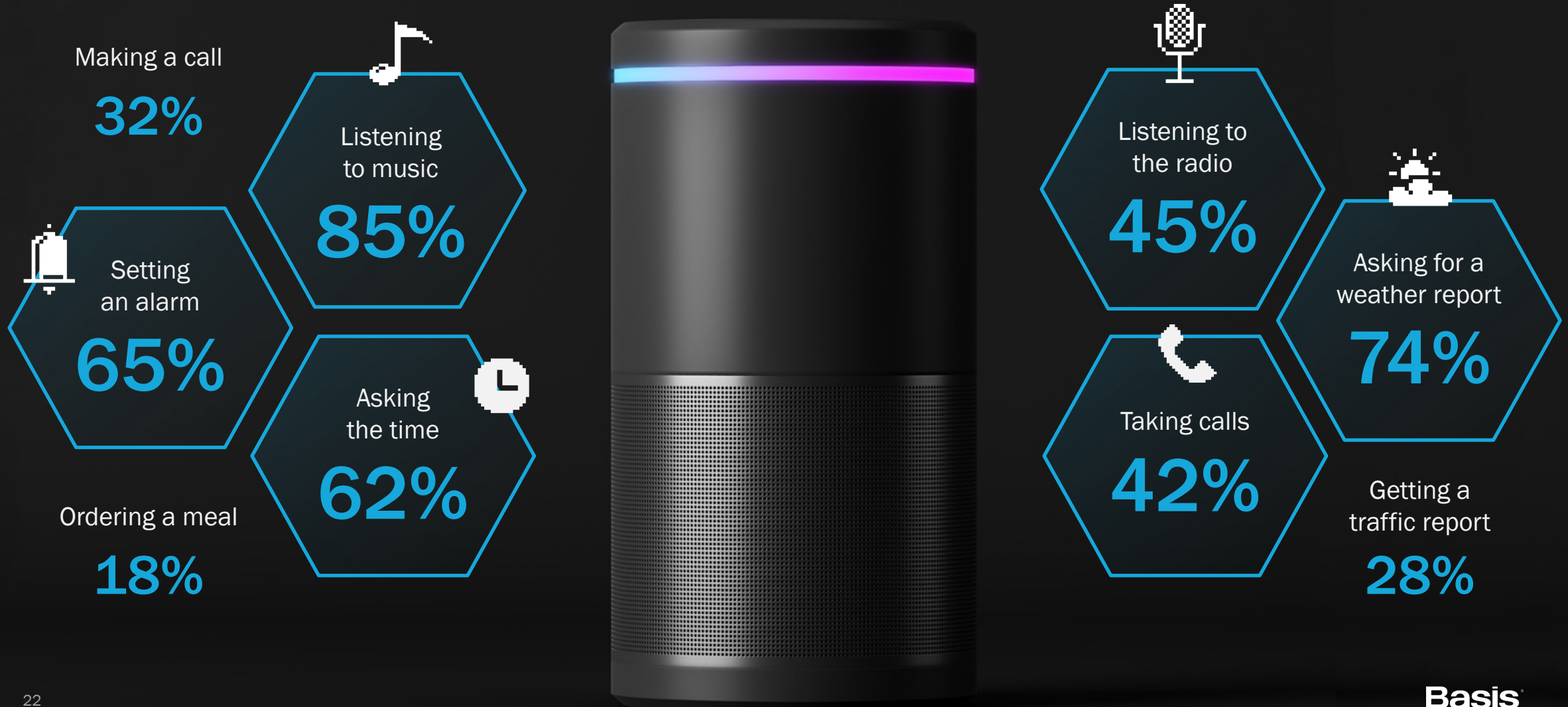
7 to 12

requests between 2017 and 2022



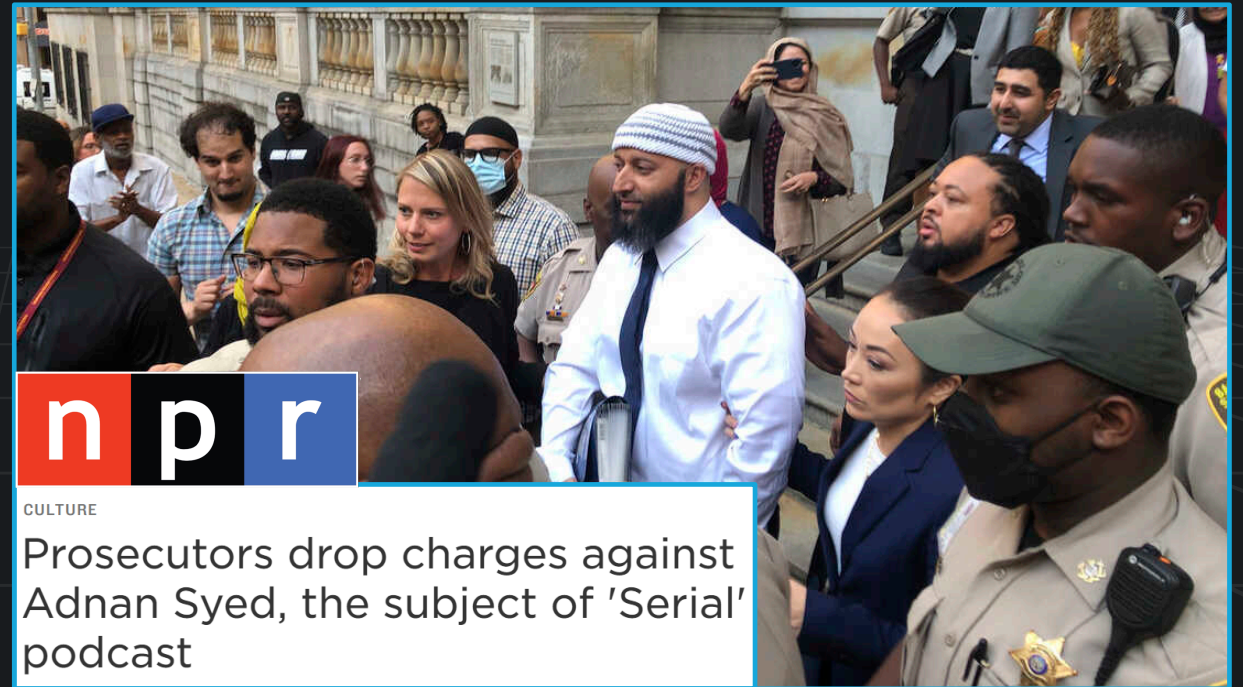
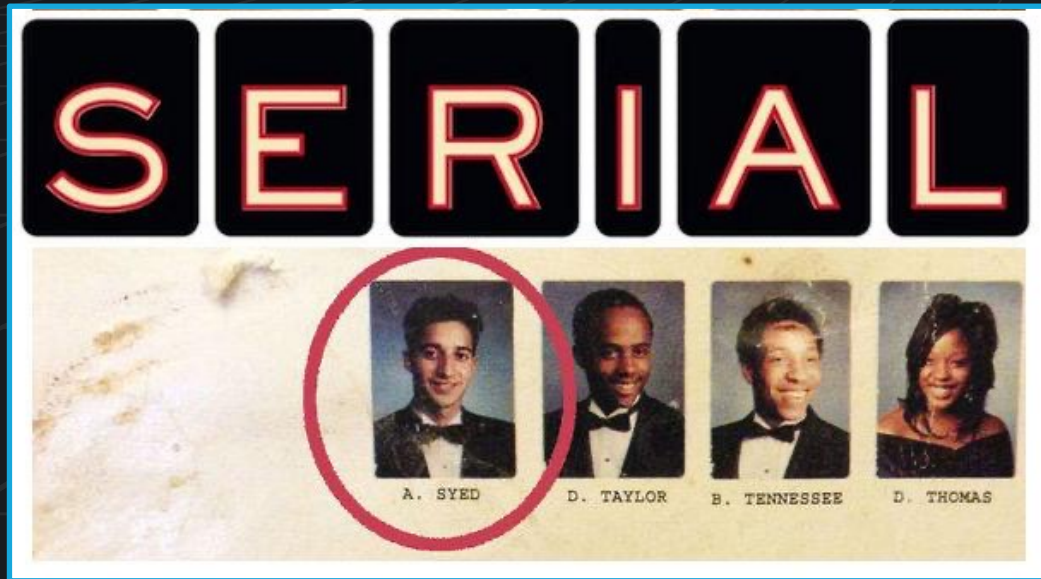
Smart Speakers Reduce Friction

WHAT ARE WE USING SMART SPEAKERS FOR? (MILLIONS)



Podcasts Have a Powerful Influence on Culture

In 2014, Serial released their first episode, 'The Alibi.' The world quickly became captivated with Adnan Syed's story, causing a re-examination of his case and eventual release from prison 23 years later.



SPEED OF SOUND

Podcasts Play a Key Role in How We Engage With Culture

4MM

Podcast Shows
on Spotify

300k

Years Spent
Listening in 2022

Podcasts Get Us Closer to the Action



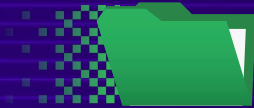
And Contribute to Cultural Clout



Takeaways



Nearly every American now listens to streaming audio



Develop strategies that lean into consumer listening habits



Brands should start to develop robust audio strategies

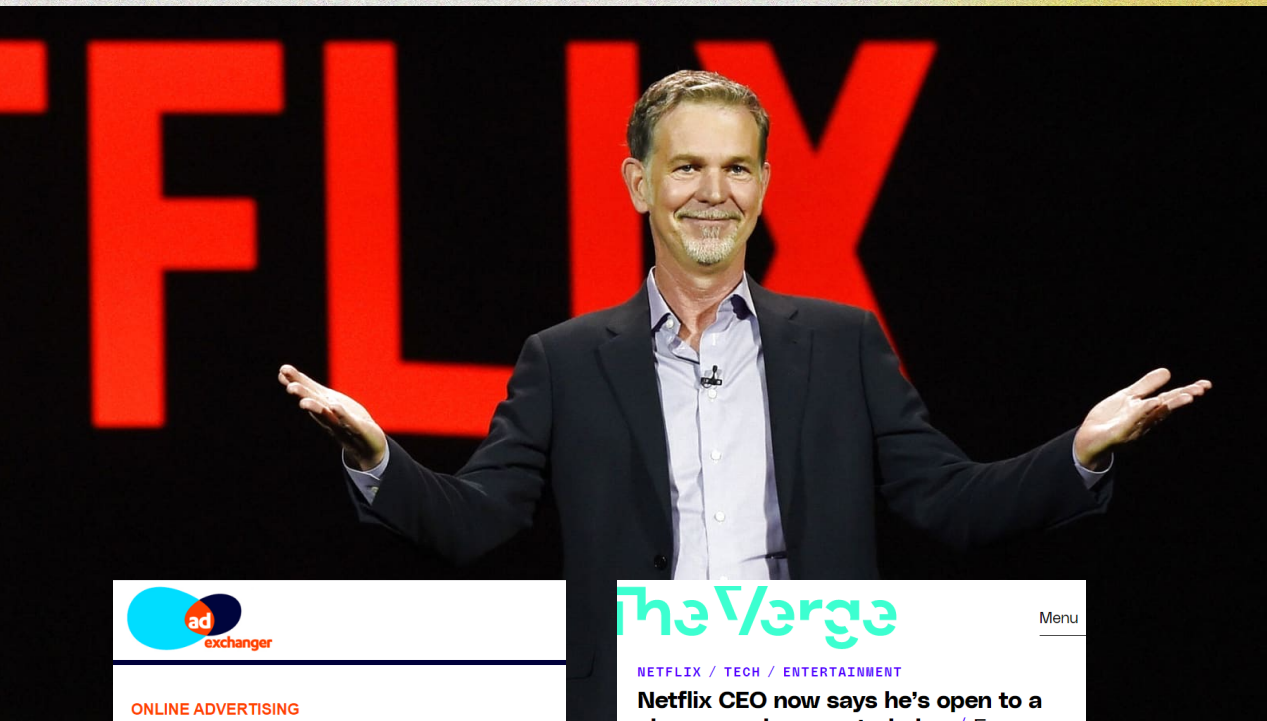
TREND 3

Streaming Consolidation

The Streaming Ecosystem Continues to Evolve



Streaming Execs Reverse Course on Ads





ONLINE ADVERTISING
Reed Hastings Explains Why Netflix Won't Ever Sell Ads

 Menu
NETFLIX / TECH / ENTERTAINMENT
Netflix CEO now says he's open to a cheaper, ad-supported plan / For 'consumers who would like to have a lower price and are advertising tolerant'




Apple is quietly pushing a TV ad product with media agencies


Apple Is an Ad Company Now

\$7 Ad Supported +  = **\$20** Premium

Consumers Would Rather Save Money Than Avoid Ads

AD SUPPORTED MODELS

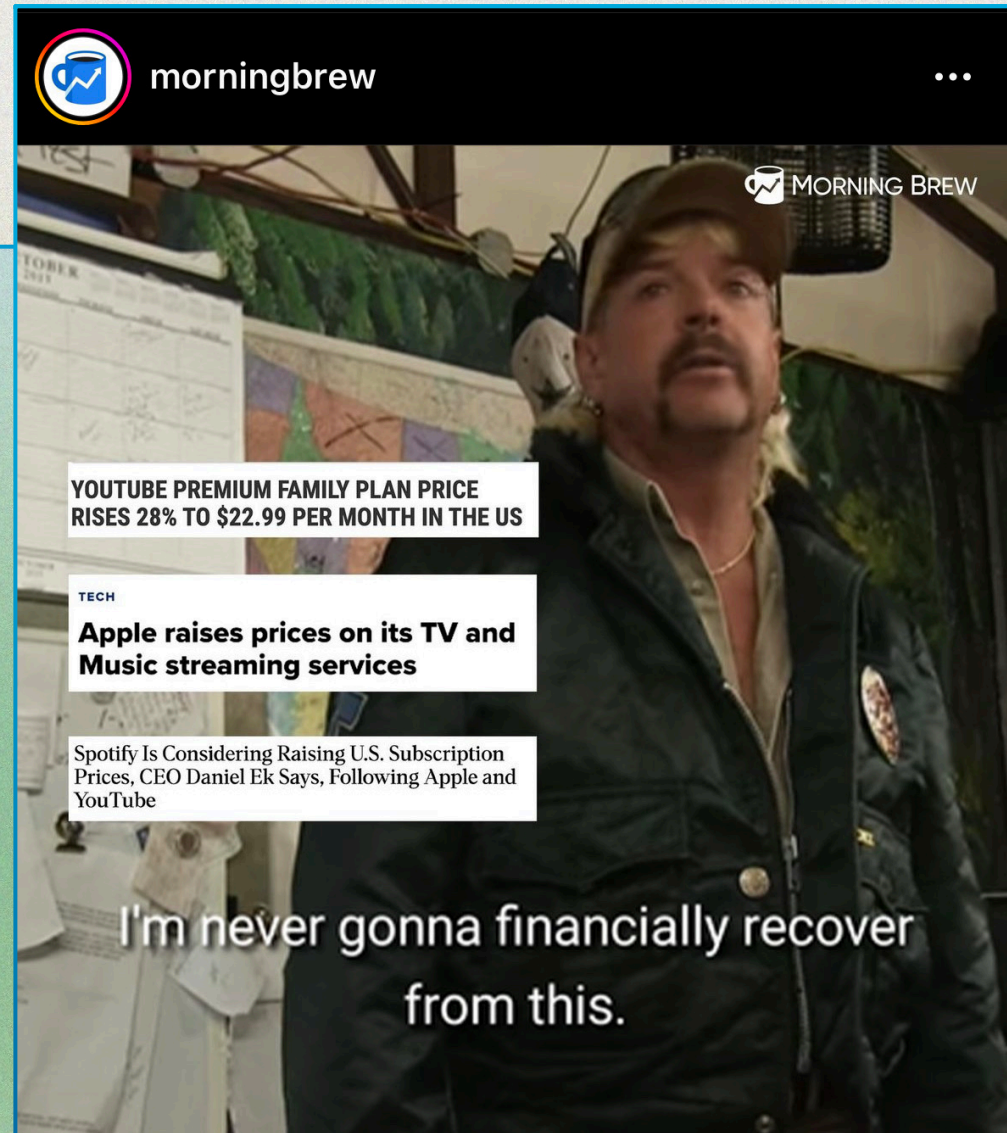
1: AVOD

Ad Supported Video On Demand



2: FAST

Free Ad Supported TV



Streamers Look to Ad Tech to Power the TV of Tomorrow

CONTENT PROVIDER

FOX **Roku**

NETFLIX **dish**

ADTECH PARTNER

Magnite  **Nielsen**

 **Microsoft**  **BEACHFRONT**

Ad Tech Prioritization is a Good Thing for Advertisers



PROGRAMMATIC ENABLEMENT

- Streamlined transactions
 - Cost effective
- Unifies fragmentation



DATA AGGREGATION + ACTIVATION

- Expansive audience libraries
- Multidimensional targeting
- Informed addressability



MEASUREMENT INTEGRATIONS

- Enhanced transparency
 - Standardized metrics
- Brand safety + fraud protections

Creative Will Go Beyond the Lean Back Experience

Audiences will move from passive to **active participants**

Big screen begins an **interactive canvas**



STREAMING CONSOLIDATION

Expanded Access to Networks, Integrations + PMP Deals

STREAMING TV OPPORTUNITIES



2023 INVENTORY OPPORTUNITIES



Takeaways



Streaming providers accelerate access to premium advertising opportunities



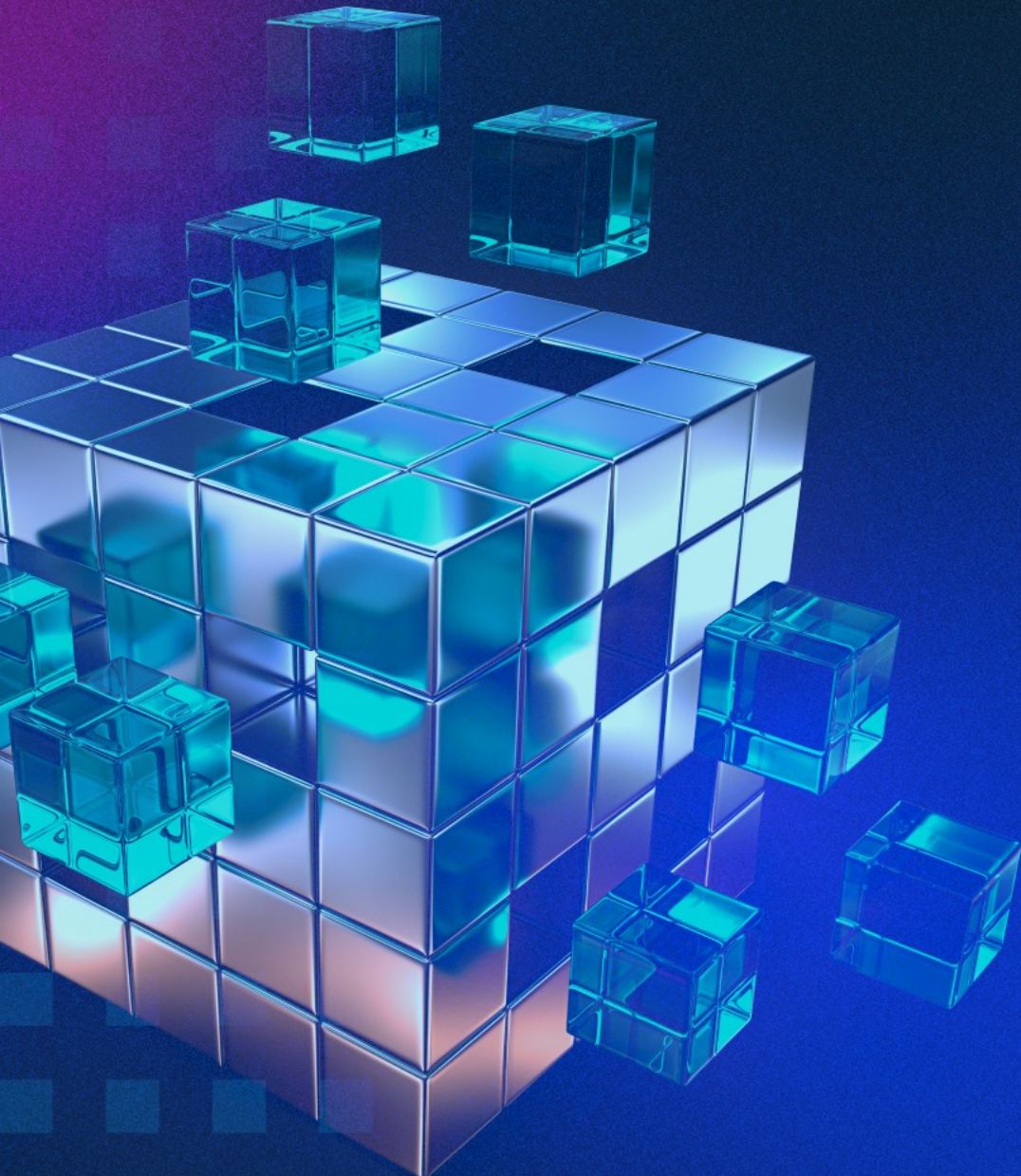
Consumer favorability toward ad-supported services is promising



Ad tech advancements enable greater buying control



Ad units offer brand interaction



TREND 4

Back to Basics



Oversimplified Tools + Tactics Instill a False Sense of Confidence and Laziness in Media Buyers.



Ad Targeting

Audience Persona:
Young Homebuyers



Previous Targeting
Options

Detailed Targeting INCLUDE people who match at least ONE of the following

Behaviors > Residential profiles

- Likely to move

Interests > Additional Interests

- Buying a House
- First-time buyer
- House Hunting

Add demographics, interests or behaviors | Suggestions | Browse

Narrow Audience

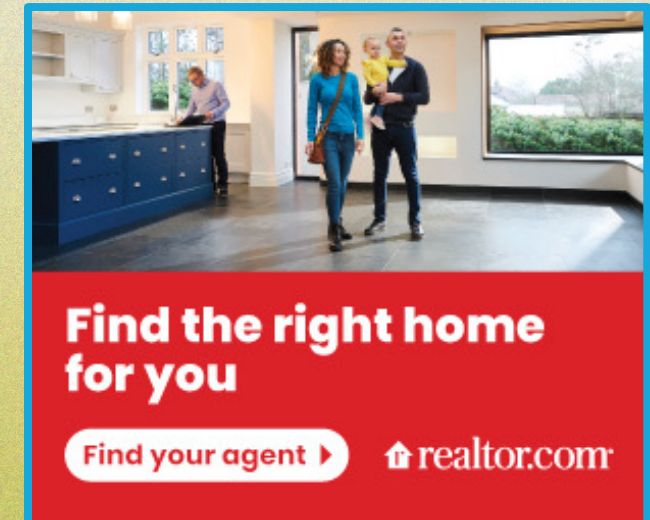
EXCLUDE people who match at least ONE of the following

Demographics > Ethnic Affinity

- African American (US)
- Asian American (US)
- Hispanic (US - Spanish dominant)

Add demographics, interests or behaviors | Browse

Advertiser
Creative



Nailing the Basics Builds Better Media Strategies

BACK TO BASICS: FOUNDATIONS



PLANNING

Create Long-Lasting,
Impactful Strategies



PROTECTION

Steward Media Investments
Responsibly



AUTOMATION

Effectively Leverage
Valuable Time Resources



The Perils of Bad Media Strategy



**Failure to Face
the Problem**



**Mistaking Goals
for Strategy**




**Scattered Strategic
Objectives**



**Cycles of
Recycling**



The fresh thinking that led to a company's initial success is often replaced by a rigid devotion to the status quo. 

– Donald Sull, MIT Sloan School of Management

Prescriptive Planning Generates Strong Strategy

1 Understand Your Challenges



Coinbase failed to foresee website overload + education needs

2 Orchestrate Channels + KPIs



Audio ad: getquip.com > website visit: bounce > IG retargeting: coupon

3 Establish Your Baseline



Historical data informs campaign performance potential

4 Don't Recycle, Reinvent



Static images to video slideshow fail to engage



Bad Actors Pose Big Threats to Brands

\$68B

in global ad spend
will be lost due to
fraud in 2022

81%

of consumers find it annoying
when brands appear alongside
low-quality content

62%

Reported they'll stop using a
brand altogether if ads appear
near low-quality content

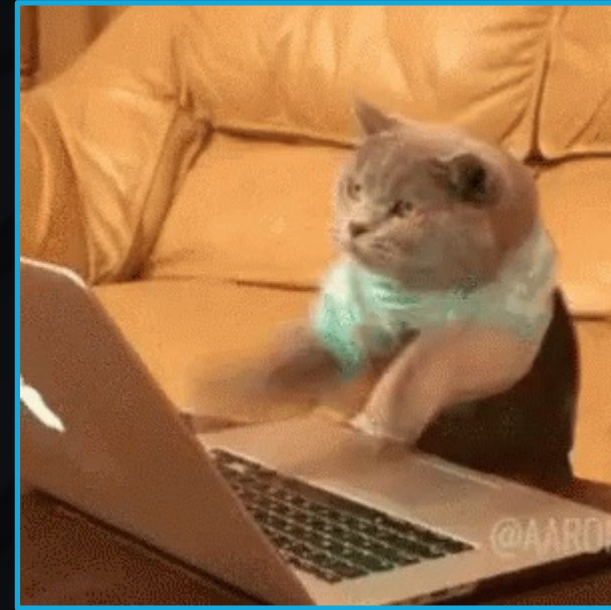


A Passive Position Exposes Advertisers to Crisis



SET IT AND FORGET IT

May meet fraud and safety criteria but won't adapt to changing needs



KNEE-JERK RESPONSES

Leads to strategies defined by fire drills rather than brand values + needs



Take Action on Protecting Your Brand



LEVEL SET WITH CLEAR OBJECTIVES

What are the required brand suitability guidelines for your brand?
(Ex: brand alignment to geopolitics, healthcare legislation)



GET TO KNOW YOUR TOOLS

Understand standard *and* advanced brand protection offerings to customize to brand priorities + needs (Ex: Nobl, Peer39's Reticle)



TAKE A "REVISIT, RESET, REPEAT" APPROACH

Consistently evaluate guidelines and revisit your settings to incorporate current events and shifting news cycles



Media Buyers Are Busy – Where Does All The Time Go?

9

different
platforms to
execute paid
media

6

hours spent on
low-value tasks



Taking Back Your Time

Ensure Campaign Success Through Streamlined Planning Tools

Produce Higher Value Campaigns Using Sophisticated Optimization Tech

Drive Impactful Data Discovery + Deliverables With Measurement Capabilities



AUTOMATION RESULTED IN

51 Hours

Saved Per Campaign

Back to Basics Takeaways



Assess potential pitfalls to avoid bad strategy



Steward brand investments by fine tuning brand protection



Embrace automation + allocate time back into high value work



“Every economic downturn has led to the creation or accelerated adoption of a new media, whether it be radio, TV or social media, and in the months ahead **we should all keep an eye on what’s next.**”

– William Swayne Chief Client Officer, Media, dentsu international

Layoffs continue to plague tech (and adtech).



calltoleap 🌐 😞 Tech layoffs are on the rise. As economic turbulence continues, tech companies are cutting costs, benefits, perks and workforce.

Just in the last two months, here's how many employees these companies have laid off and the percentage of their workforce cut 📌

Amazon	~10,000	3%
Meta	~11,000	13%
Twitter	~3,800	50%
Stripe	~1,100	14%
Microsoft	~1000	less than 1%

Addressing Digital Sea Change in 2023

1

High value, actionable data demands advertisers develop comprehensive data capture, processing, and activation processes

2

Audio is everywhere, brands should build dedicated sonic (branding) strategies to capitalize on a receptive – and growing – audience

3

Advertisers can take advantage of the premium opportunities presented by streaming's consolidation and prioritization of ad tech

4

While the ad industry faces deep, disruptive change, advertisers must establish firm foundations for the future by regularly revisiting the basics



Questions?



basis.net/trends