

From algorithms to AI, Kantar Millward Brown forecasts SEA changes in the digital advertising ecosystems in 2018

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Annual Media and Digital Predictions highlight continued evolutions in branded storytelling, cross-media measurement and ROI



Kantar Millward Brown, a leading global research agency helping businesses grow strong brands, has released its annual Media and Digital Predictions for 2018. For the 10th year running, the company's predictions provide marketers with a clear guide to the challenges and opportunities of the next 12 months, helping them shape their media and digital marketing strategies.

2018 is poised to be another busy year for marketers, complete with continued evolutions in communication approaches, media targeting technology and ROI measurement.

"The challenge with non-traditional forms of advertising is how to prove effectiveness; whether the objective is to make people

more aware, change perceptions, or take action," said Jane Ostler, Managing Director, Media & Digital at Kantar Millward Brown. "The impact and return on investment can be compared directly with other brand and behavioral metrics, but brands must be clear about their objectives and consider how to measure effectiveness early in the process."

How brands communicate with people will continue to evolve rapidly away from just standard paid media. Brands will embrace **new story telling opportunities**, look to entertain in innovative ways, and even start experimenting with **voice-activated marketing**, but this will also raise new measurement challenges.

- **Advertisers will start with the story:** Marketers will stop approaching the world from a perspective of ad executions or campaigns and instead find new and inspirational ways to tell their brand story with content.
- **Branded entertainment takes center stage:** More brands will start to use film to communicate their messages in an entertaining way.
- **Voice will spur the adoption of smart devices:** As connected devices look to gain mass acceptance among consumers, the advent of voice control could supercharge adoption, provided manufacturers can bridge the divide between devices.

Media targeting continues to advance, thanks to improved validation of **audiences within walled gardens**, and the development of **new machine learning technology** that enables smart outcome-based decisions. "**Over-the-top**" (OTT) **streaming content platforms** will also enable brands to target customers where they're increasingly watching video and will usher in new TV and cross-platform media measurement opportunities.

"Taking measurement over-the-top is arguably the only viable path toward the grand finale – an ideal world of perfect information gathered across all screens and touchpoints, delivered in real-time," added Corey Jeffery, SVP, Media & Digital Product Leadership. "While that's likely to remain just the treatment of an as-yet unwritten script for the future of media research, 2018 will prove a break-out year in the integration of various forms of passive OTT media and advertising data into the measurement frameworks of tomorrow."

- **We will see accelerated growth of Walled Gardens:** The work that walled gardens have done in 2017 to give more

reassurance to advertisers and media agencies on the basic hygiene will help them to accelerate share in 2018. However, marketers need to push them to build more doors and windows within those walls for their campaigns.

- **Marketing will evolve from algorithms to AI:** The last decade of digital marketing has been ruled by the companies with the most compelling algorithms. While that'll certainly continue to be true in 2018, we're starting to get our first glimpse of functional artificial intelligence being applied to marketing challenges in new and interesting ways.
- **Measurement follows media over-the-top:** The same OTT paradigm-shift roiling the "old Hollywood" model is poised to similarly impact measurement frameworks.

Following a year where many brands were questioning and rethinking digital investment, 2018 will see more focus on **an integrated view of the overall mix**, including digital, while measurement and optimisation approaches will be modified so that ROI becomes more of journey and less of a destination.

- **Cross media is the \$100m dilemma:** This year, most advertisers started to reconsider their digital investment and scrutinize its impact. They will go one step further in 2018 and start to question the role digital plays within the entire media ecosystem; media agencies, publisher and research partners will have to be ready to give an answer.
- **Media ROI will be about the journey:** In 2018, real media ROI will become a fast-paced iterative journey where creative (all content, not just ads) and media (partnerships, not just insertion orders and exchanges) work more in tandem, with the express goal of achieving continuous improvement in sales and brand outcomes.

"Marketers are now keenly focused on ensuring that they understand the impact of their investment, particularly given that digital now accounts for more than 30% of global share of investment," said Pablo Gomez, Media and Digital Director, Kantar Millward Brown NASEAP. "It's up to industry players to answer the \$100m dilemma: how could that money be invested better – and not cut – so that it achieves the desired impact?"

To access the full 2018 Media & Digital Predictions report visit www.millwardbrown.com/digitalpredictions/2018

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