

Advertising in 2030



Experts rate the impact of 2020

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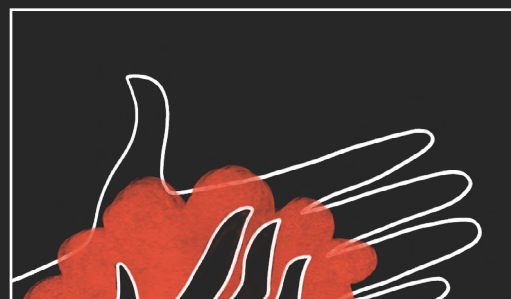
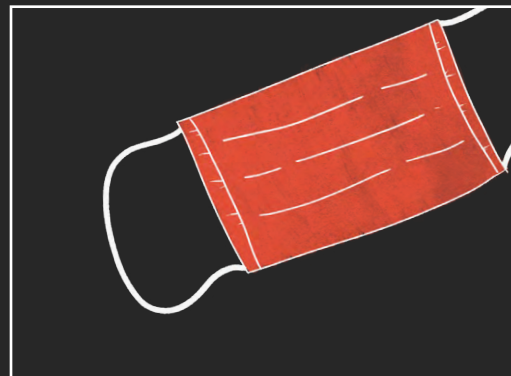
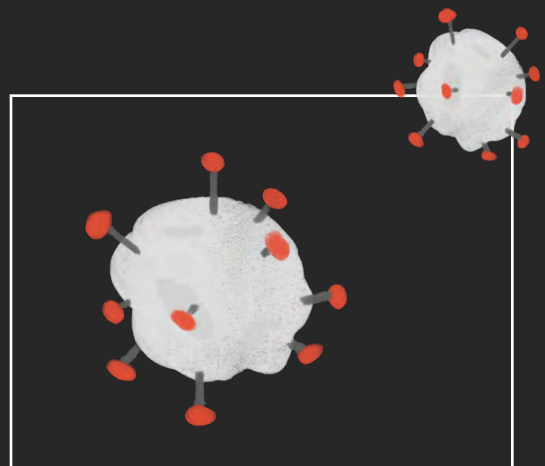
Intro — duction

Toilet paper shortages; community singing, clapping, and **“howling”**; the return of dolphins to the Bosphorus—these were not events anyone predicted at the start of 2020. And while those examples may be some of the more fleeting trends from 2020, others will deeply impact the next 5 to 10 years and the way people interact with their environments.

In January and early February of 2020, we asked an elite group of marketing practitioners, executives and academics to speculate on the future of advertising in the year 2030¹. At the time we conducted our research Covid-19 had not yet been declared a global pandemic or established its now-universal dominance over our lives, businesses, and priorities. Not long after publishing, however, it became clear we would need to revisit our research in light of the scale and transformational consequences of the coronavirus.

So, at the end of 2020, after a year spent in varying levels of lockdown or voluntary sequestration, we re-interviewed our growing panel of experts to understand how they think Covid-19 has impacted the likelihood of the 15 scenarios we originally explored.

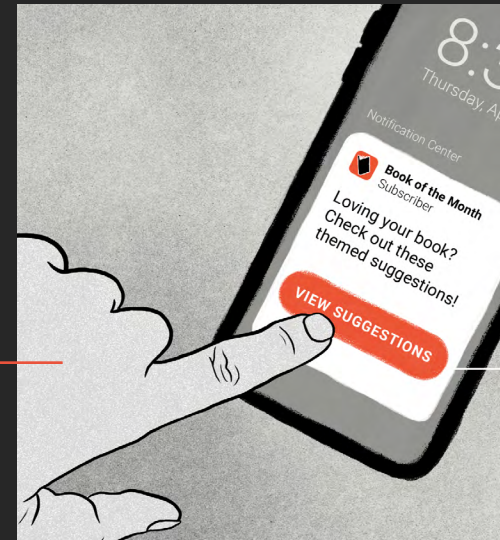
¹Why 2030? As we wrote in our original report, the 10-year horizon is an ambitious target not often tackled by many agencies or press outlets. We hope it continues to give our panelists the freedom to stake out some bold predictions without the pressure of accuracy expected from more immediate forecasts. Most importantly, regardless of the accuracy, the act of discussing scenarios and adjusting strategic plans based on the far future produces many benefits in the agility and resiliency of any brand.



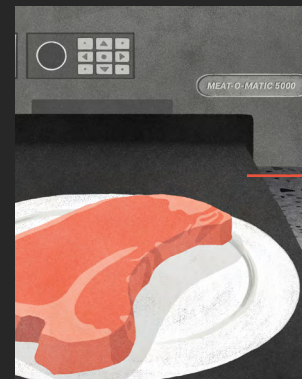
Our experts expect eight future scenarios to be even more likely following the events of the previous 11 months, including the **use of biometric data** (65% more likely), time spent in **virtual environments** (59% more likely), and trends toward **subscription services** (59% more likely), **personalization** (56% more likely), and **micropayments** (46% more likely). Nearly 60% felt 2020 will accelerate the trend toward consumer prioritization of **environmental impact** and over 40% saw an increased likelihood that **AI and automation** lead to job and wage losses. Five scenarios were seen to have been largely unaffected by the year's upheaval, and our experts rated just two as being less likely than at the start of 2020—the adoption of a **global privacy law** (50% less likely) and the ability of large **tech companies to remain intact** (41% less likely) as global consolidated entities. Clearly, the worldwide trends toward polarization and away from global cooperation were felt almost universally.

The following report explores these changes—and what our new economy means for advertisers. In considering the results of this research, however, it is instructive to consider just how far Covid-19 was from our collective consideration at the outset of last year. In reviewing the hours of interview transcripts and written quotes collected in our original study, we found just one reference to the potential impact of a global pandemic. Veronica Barassi, Professor of Media and Communication Studies at the University of St. Gallen, had a notably prescient answer in response to our question about whether or not people will spend more time in the virtual world than the physical one by 2030. She compared the rise of virtual environments to the emergence of online technologies when “everybody said people are going to stop reading books. That’s not true. It just changes the meaning of life in many ways, but it doesn’t replace what we have. Unless there was a pandemic or something tremendous happening and we have to stay in our houses.”

After a year in which the always possible yet under contemplated consequences of a global pandemic became clear, what other unthinkable events might upend expectations and create new opportunities over the next decade?

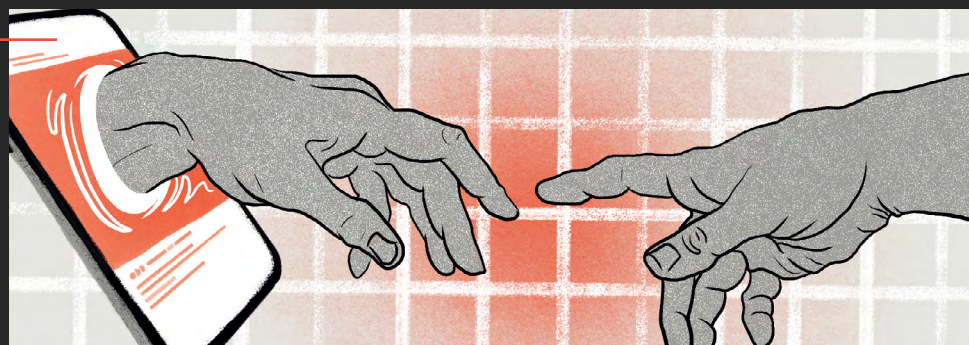


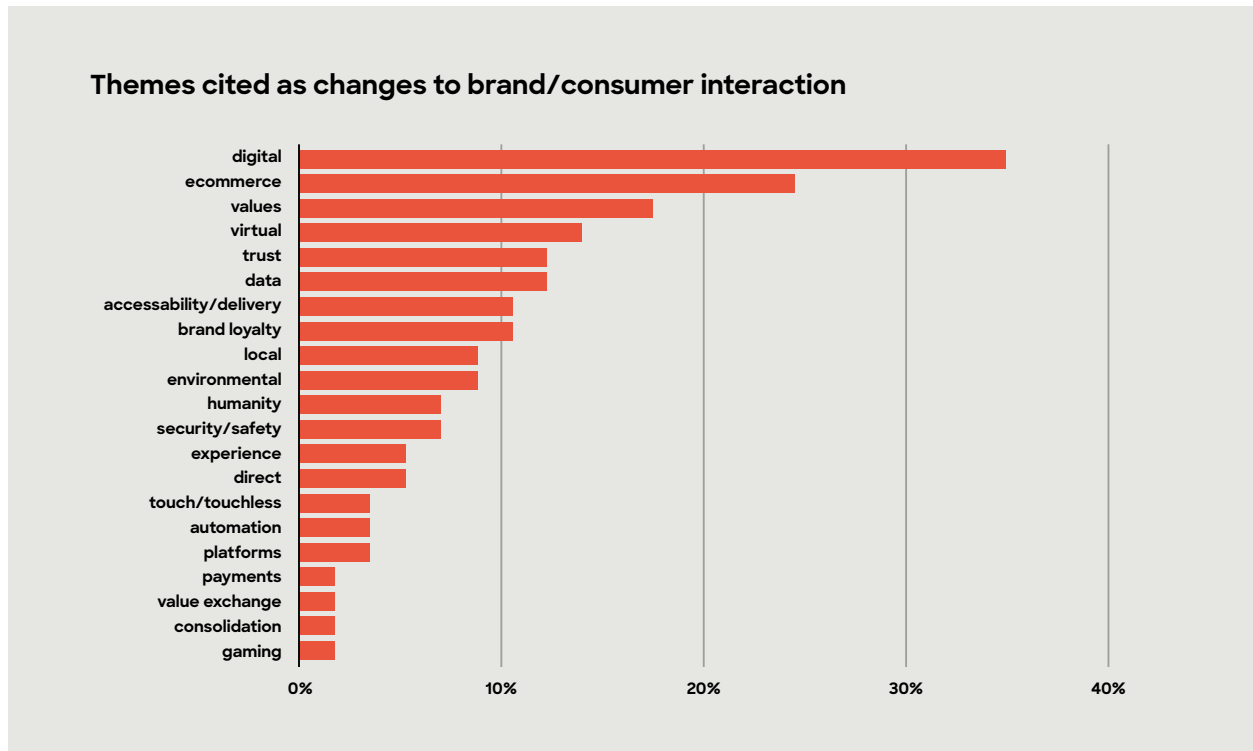
Trends toward subscription services
59% more likely



Consumer prioritization of environmental impact
60% more likely

Time spent in virtual environments
59% more likely





How has Covid-19 changed the future?

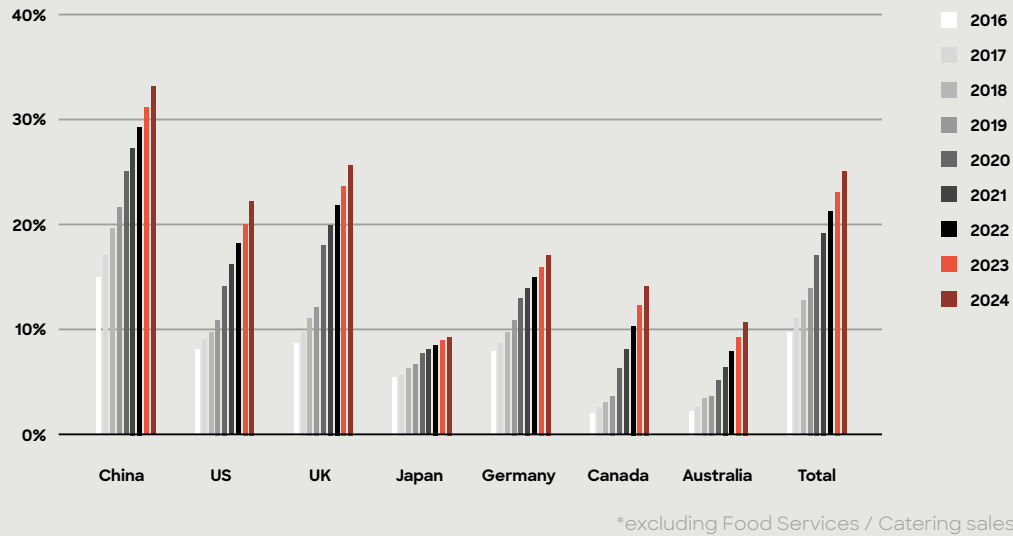
The virtual economy

We asked our panelists what had been the biggest change in the way consumers interact with brands as a result of the coronavirus pandemic. Unsurprisingly, nearly three quarters of panelists named the move to digital or virtual offerings and ecommerce.

The brands that adapted well to this great shift leaned into opportunities to meet customers in new ways, like [Marc Jacobs' Animal Crossing fashion show](#), EE's [Match Day Experience](#) on the BT Sports app, or the [BTS virtual concert](#). Retailers that had prioritized ecommerce, click to collect, and fast delivery in the lead up to

2020 reaped the rewards. And while the inability or reticence to visit brick-and-mortar retailers seemed at the outset like a boon to DTC brands, sales have primarily been hoovered up by big box retailers selling essential goods and the Shopify/Flipkart/Alibaba/Amazon giants. In the US, Target's ecommerce sales grew over 100% in 2020 and [Amazon alone accounted for 39% of all retail ecommerce sales](#) through October 2020. GroupM predicts retail ecommerce will grow from [\\$4 trillion in 2020 to \\$10 trillion globally by 2027](#) and for economies that were lagging in ecommerce penetration (e.g. Australia, Canada, and Japan) growth should be much faster over the coming years, especially in markets hit hard by the pandemic.

Ecommerce sales as a percent of retail



Shared values

The third most cited theme among our panelists (after **digital** and **ecommerce**) was **values**. One of our experts said, “Consumers are more conscious than ever of the power of where they spend their money. We are seeing demand for companies to walk the talk—show diversity and inclusivity on their boards, implement environmentally considerate alternatives, take a stand on stemming fake news, and more.”

Panelists also cited the focus on shopping **local** and the role **accessibility** now plays in consumer purchase decisions. One expert noted, “The pandemic has led many to rely more systematically on local brands—a tendency that has also been reinforced by new environmental concerns and efforts to source goods more locally.”

All these themes contribute to the overall trust a consumer has in a brand; it is unsurprising then that **trust** was the fifth most cited theme among our experts. Of course, while we asked panelists specifically about the changes wrought by the coronavirus pandemic, it is nearly impossible to disentangle the huge social and cultural events that also dominated 2020 and that contributed to a growing consumer call for values, trust, and authenticity.



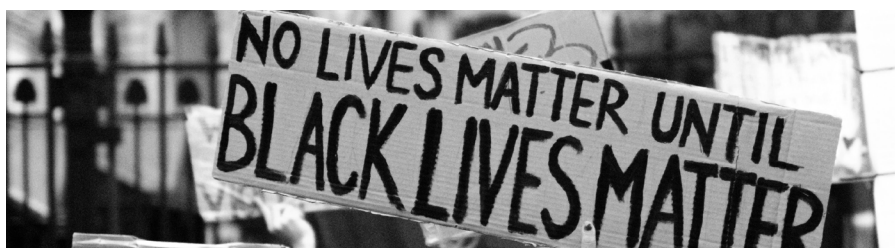
Social reckoning

Close on the heels of 2018's #MeToo movement, the world reckoned with enduring systemic racial inequality, with #blacklivesmatter protests and marches taking place in more than [4,000 cities globally](#). The advertising industry was confronted with the severe lack of diversity in its own ranks and a “[Call for Change](#)” outlining a 12-step actionable plan was taken up by holding companies [including WPP](#).

Many advertisers were quick to throw up black squares on their Instagram accounts or pledge support to the movement. We [counseled brands](#) at the time to be purposeful and considered in their actions, focusing on committing to a cause for the long term, elevating voices of the community rather than the brand narrative and driving real change both internally and externally.

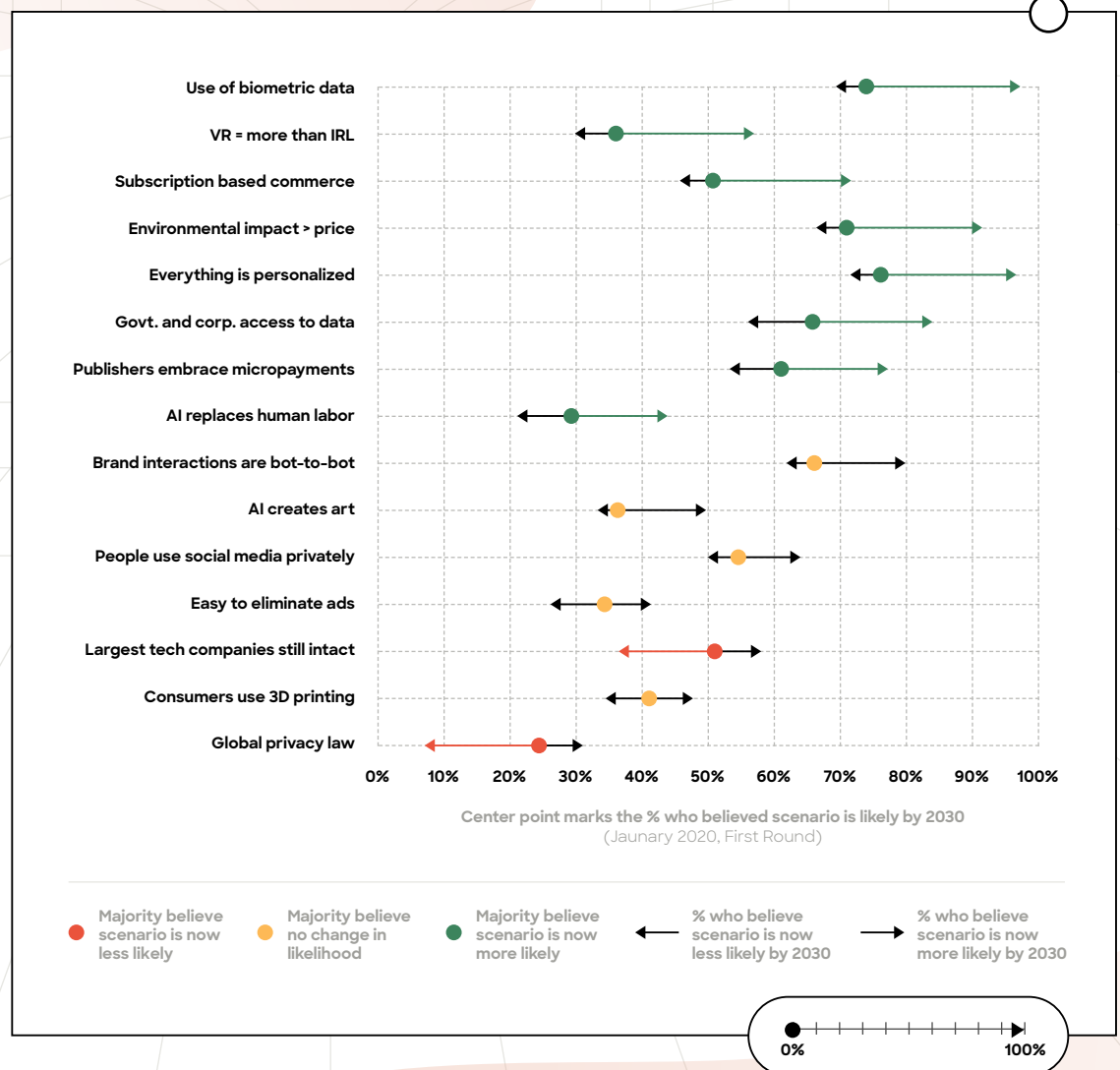
More than ever before, many brands publicly took a stand, aligning themselves with their consumers and the causes they care about. Some of these efforts were less successful than others, and over the next decade we expect marketers will need to become much more sophisticated in clearly articulating the brand's purpose—what it stands for and what it doesn't.

Our original survey found that a majority of panelists believe environmental impact will equal or surpass price as a purchase consideration by 2030. The events of 2020 show that other social causes have the potential to become vital to consumers as well.



Accelerating trends

Taken together, the events of 2020 are perceived to have increased the likelihood of the scenarios we tested. The majority of respondents judged 8 of the 15 scenarios we asked about in our original survey to now be more likely to be true by 2030, while 5 were judged to have been unimpacted, and 2 are now less likely.



Biometric data

The trend that saw the greatest acceleration, according to our panelists, was the use of biometric data to access, personalize, and/or secure data and services. In our original survey, many panelists pointed to markets like China as the natural places where this would first be a widespread trend, and in fact the country instituted “health cards” in 2020 to gate access to travel based on health and Covid-19 infection data. Now at the start of 2021 as the vaccine rollout is well underway there are numerous conversations about where airlines and even employers might require evidence of vaccination for travel or a return to the office.

Obviously this has quite severe implications in the event that access to healthcare and vaccinations becomes yet another wedge in furthering global inequality. And in the US, where [82% of respondents to a recent technology-focused survey](#) believe that only they or a loved one should have access to data from their health and fitness trackers, it’s clear to see there are still massive privacy and confidence hurdles to overcome.

That said, biometric-based account access is a tool many already enjoy today and one we expect to see grow substantially over the coming years, although perhaps not soon enough for [2020’s bitcoin millionaires locked out of their accounts](#) (and their earnings) after losing or forgetting their passwords.

Virtual environments

After months of video meetings, virtual family holidays, and online schooling, it came as no surprise that 59% of panelists believe it is now more likely that we’ll spend a majority of our time in virtual environments by 2030. Of those ranking the scenario less likely, at least one panelist felt there would be a backlash by 2030 after the current push into virtual.

In the first round of our survey, several panelists raised the question of what counted as virtual—obviously immersive experiences with headsets, but what about video calls, they asked, or social media interactions? So, while this definition wasn’t provided to our panelists, here’s how we’ll define virtual for this paper and future iterations of our survey.

The *Oxford English Dictionary* defines **virtual** as anything “carried out, accessed, or stored by means of a computer, especially over a network.” By this broad definition, many of us already spend more than half our day (excluding sleep hours) in the virtual worlds of email, digital newspapers, and now video calls. But these are not a world in the sense of the metaverse from *Snow Crash* or *Ready Player One*. Most of our existing virtual experiences occur via individual physical interfaces for each interaction—mobile phone for grocery shopping or Among Us, and Google Home Hub for family chats. How likely is it that all those actions will take place through a single portal within 10 years’ time? This version of virtual likely hasn’t been moved forward significantly by the pandemic. In fact, the closest relatives of the metaverse—Fortnite, Minecraft and Roblox—while growing concurrent users and topping app download and spending charts—haven’t expanded considerably beyond their original gaming mandates.

Subscription services

Our panelists were split in the original survey, with just over 51% believing that a majority of products and services would be purchased as part of a subscription in 2030. In the second survey, nearly 60% of experts believed the events of 2020 had made this scenario more likely. In January, panelists spoke about consumers continuing to purchase staples at grocery stores and delighting in the serendipity of purchasing goods individually. By October, it was clear that many consumers were convinced of the efficacy of online shopping and the move to subscription orders (as stores and recommendation algorithms become more sophisticated) is not a far leap over the course of 10 years—surely even fewer!

The new AI economy

One further accelerated trend was not overly cited among our experts, but it deserves attention: the likelihood that a reduction in working hours and wages driven by adoption of AI and automation will lead to reduced consumer purchasing power. Adaptation during the pandemic has pushed many companies to invest in and adopt automation, robotics, and AI, lessening their dependence on human workers. It is now clear after December job numbers in several economies that many jobs lost during the pandemic will not return and that the forced adoption of cashierless and contactless technologies will in fact be maintained and expanded to reduce personnel costs for many businesses.

So, was 2020 a bump in the road or a whole new lane on the path to the new economy?

Just as the Dow Jones Industrial Average was about to cross the 30,000 barrier, the Covid Crash erased 37% of its value in just 40 days between February 12 and March 23, 2020. And then it stopped. It would take just 278 days for the market to regain all of its lost ground. By comparison, the peak-to-trough decline during the Great Recession saw the Dow fall by 49% over 16 months and took more than four years to get back to level.

Using the Dow alone to measure what is happening in the economy is pseudoscientific at best, but it does help put into context the shock to the system we just experienced. It's also useful in analyzing whether the most tumultuous year in recent history is a bump in the road for the societal transformations our panel saw unfolding over the next 10 years—or if it shifted us into a whole new lane.

Vast majorities of the global population have spent months atomized, isolated, and alone as they live, work, grieve, and worry about the future, with enormous uncertainty about when they will feel safe again. It's hard to imagine that the digital platforms that have virtually reconstituted our day-to-day lives will lose ground.

But does the success of Peloton, Substack, OnlyFans, Disney+, and Shopify represent something different from a year ago? Or are we just in an accelerationist period? Perhaps the only certainty we have is that it won't take 10 years for us to find out the answers to those questions.



Major

decelerations

In these accelerants we see that a year of lockdown has put the pedal through the floor of so many societal shifts that ebbed and flowed on the tides of ambivalence. Questions of “what will it look like?” in regards to digital commerce, remote working, cashless economies, streaming content, and the virtualization of everything are increasingly shifting to “where will it stop?” The answer is clearly not at the end of the pandemic. Covid-19 might have been the catalyst, but we have passed the point of no return.

Ironically, the major decelerants identified by our panelists have little to do with the pandemic. The largest swings toward the negative were related to a single approach to privacy and identity and the likelihood of the big tech platforms remaining intact. These strong feelings of pessimism have a theme: a skepticism of unity. And why not? 2020 was the year of personal atomization, Brexit completion, and American presidential polarization.

So what does a world without limits look like?





Big Tech Goes To Washington

One of the more divergent points amongst our panelists was the future of the major technology platforms. While some signaled that the events of 2020 have strengthened their advantages, a plurality believes that it is less likely now that the major brands will remain as consolidated entities in 10 years' time.

On its face, perhaps, a reasonable deduction. "Big technology" is now synonymous with "big business" and that is increasingly under scrutiny by national regulatory bodies. July 2020 saw the CEOs from Amazon, Apple, Facebook, and Google field sharpened questions from across the Congressional ideological spectrum. Acquisitions, data merging, and what formats were available in what ad marketplaces all came under questioning, with a bipartisan report issued in October suggesting measures to maintain robust competition among digital platforms.

Beyond the US, the OECD rewrote tax rules for the first time in decades to specifically

address the globally distributed businesses of the globally distributed tech platforms. France implemented a new digital tax as a frontrunner of this new global scheme, while Australia's parliament is considering a News Media and Digital Platforms Mandatory Bargaining Code. And in China, regulators are flexing their muscles with antitrust scrutiny and fines for the likes of Tencent and Alibaba that have been reported as "unprecedented."

But of course, increased regulatory scrutiny, public concern, and growing interest in how the Internet really works are direct results of tech's dominant role in our new world. Over the course of 2020 Apple became the first \$2 trillion company in history, while Lyft, Uber, DoorDash, Postmates, and more won big on preserving their contractor-based business models with California's Prop 22 passing with almost 60% of the vote. What's more, it is not clear that a bipartisan approach to new regulation will emerge as a real threat any time soon. As one of our panelists phrased it, "They might fail all on their own, of course, but it won't be regulation that kills them."

Privacy-as-a-Service

While most of the conversation about regulation focused on censorship and antitrust in 2020 it is easy to overlook the significant advances for privacy over the last 12 months. Canada, Brazil, China, New Zealand, and over 30 states in the US have advanced legislation largely in line with the tenets established by the GDPR.

It's not just pandemic news drowning out these advances. Further consolidation of the adtech ecosystem during the pandemic has transformed the role of the largest platforms in the privacy debate. Not only are they the subject of government, they must also function as governments too. Markets move based on their privacy policy updates—Facebook down, for example, when acknowledging the negative impact the Identifier for Advertisers (IDFA) changes would have on their business, and The Trade Desk up (for a while) when reassuring that the effect would be marginal. On the other hand, one would be hard pressed to find similar impacts stemming from international privacy legislation being passed by regulators.



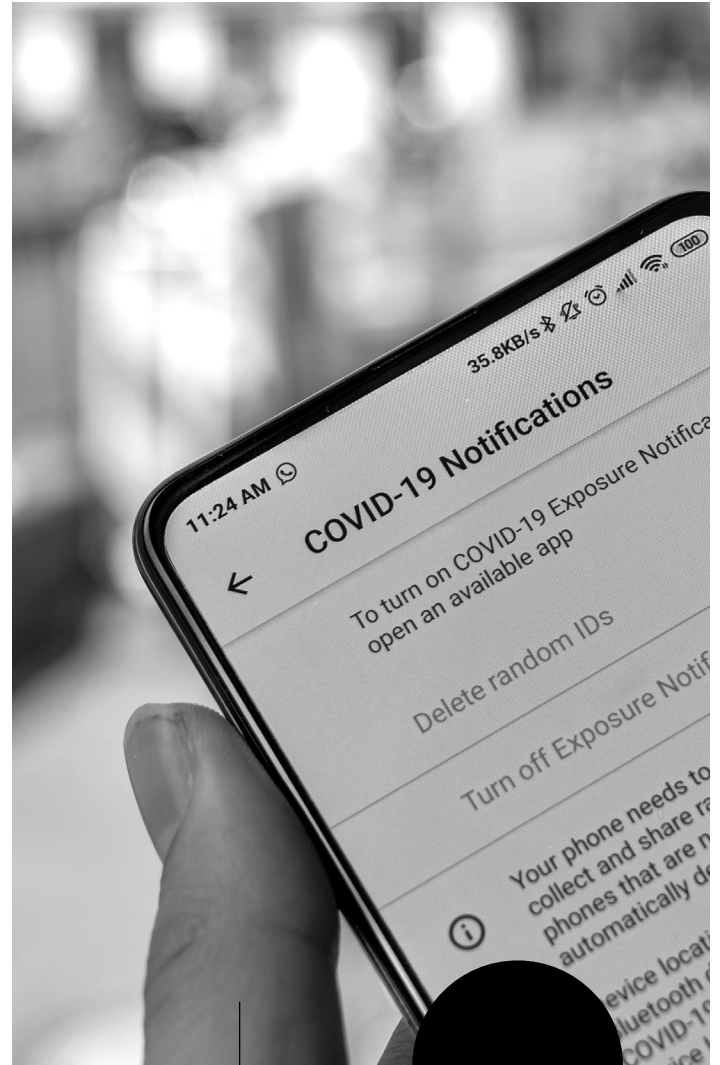
Ethics and revenue expansion are hardly the only market forces motivating companies to reconsider their privacy regimes. User opinion matters, as well. A backlash against Facebook for privacy changes to WhatsApp in the beginning of 2021 led to a mass exodus from the platform, pushing Signal to the top of the app download charts in India in less than a week. In response, Facebook delayed those changes by three months to provide greater explanation and transparency into what the real impact to the user base would be. Apple's new App Tracking Transparency feature will empower users to limit and control unique identifiers and push privacy further into their conscious decision making.

Our panelists believe global regulatory standards are unlikely to emerge over the next decade, but the ability of global movements to impact policy across countries is one that has only recently been realized. Perhaps we will still see a Global Paris Agreement for privacy.

Sharing is Caring

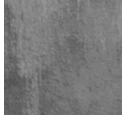
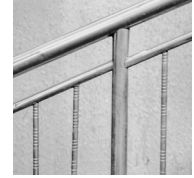
One panelist highlighted an important and complicating factor for privacy advocates worldwide: the concept of trading privacy for personal safety. When Covid-19 went truly global, Apple and Google announced a partnership to create the framework for contact tracing using Bluetooth in their handsets. Both companies made clear that no personal data would be exchanged or exposed in this process, but it created a new thread in the conversation surrounding the value exchange of data going far beyond personal ads—one that is increasing in volume as pharmacies like CVS in the US, Boots in the UK, and Phoenix in Germany pivot from traditional retail models to digital wellness platform plays.

The contact tracing experiment also bolstered our panelists' skepticism for the success of a global regulatory scheme in the failure of both local and national governments to successfully build on the technical frameworks provided to them by Google and Apple. After nearly six months of haphazard investment, poor app development, and bad strategy, the two companies took matters into their own hands to solve the problem directly.



The background features a light gray grid with wavy, horizontal lines. A large, soft red gradient shape, resembling a stylized 'C' or a comet tail, curves from the top right towards the center of the page.

What this means for Advertising in 2030



2020 is over, and the opprobrium for its events has almost everyone ready to turn the page on it permanently. It is, of course, not so simple. The yearned for stability and predictability of the pre-Covid era never existed in the first place. Indeed, we began this study in 2020 to provide marketers with more clarity about the likelihood of different potential futures for marketing. Now the only certainty we have is that there will be more uncertainty. Will the vaccine stick? Is there a recession lurking around the corner? Will movie theatres ever open again? Is the new economy here to stay? Is it really all that new? At a time when we are still reeling with the very concept of what “normal” is, it is unclear what that even means.

We see this played out on a smaller stage in the feedback from our panelists. In looking out 10 years, we could identify some clear trends, broad consensus, and a vision of the future that fit together in a dynamic but cogent manner. Today, shifts in our panel’s sentiment are far from uniform and frequently contradictory. Just about the only thing that we see emerging by acclamation is the acceleration into ecommerce that was already in progress. Atomization, apparently, is here to stay.

Pairing the uncertainty of what 2021 holds for society with the certainty that the personal will become increasingly digital, it becomes clear that optionality and flexibility will be the

key themes for how advertisers behave in this media landscape. Investment time horizons will shorten, both to mitigate risk but also to accommodate more experimentation as platforms and media owners get more creative in how they go to market. Brand building and customer experience will also necessarily collapse in on each other as advertisers are forced to consider how to build and maintain brands outside of any mass media experience and instead think about it as one impression—or even one transaction—at a time.

Taking this conclusion to its logical endpoint, what is most impactful for advertisers is the shift in the definition of what a platform is and what it can do. Platforms have now emerged as totalizing entities, and nowhere has the pandemic made this more apparent than the healthcare space. mClinica raised two rounds of funding within months of each other to scale their Southeast Asian pharmacy platform to meet the needs of both consumers and public health departments. Meanwhile, American pharmacies like Walgreens have moved at warp speed to transform their traditional retailer businesses into integrated customer platforms that aim to bring together progressive long-term healthcare applications (think vaccine passports) with classic marketing programs (think digital coupons).

That’s a lot more one-stop shops on the digital block.

Human Touch With A Digital Fingerprint

In 2015, panels similar to ours were confidently making predictions that self-driving cars were just around the corner. Which corner? 2021. We know now that those predictions were optimistic. But to what degree they were optimistic we are still waiting to see. A schism in how we talk about the technology has emerged: investment pours in with hype for near-term horizons while experts talk about the timeframe for driverless cars as still being decades away. Waymo has adopted the term “autonomous” to distance itself from Tesla’s seeming co-option of “self-driving” to describe driver-assist technology.

What can we learn from this uncertainty? Technological transformation may be inevitable, but people still matter too.

When we look at this through a broader consumer lens, our panel members remain techno-optimists. Only 12% believes it is now less likely that most interactions between brands and consumers will be bot-to-bot. But we believe with increasing uncertainty, with increasing choice, and with increasing digitization, the need for personal choice—and as a result the importance of brands to emerge from the noise—will be more important than ever. Assistance technologies will play an important role in the first phase of sorting after discovery. Level 5 autonomy in consumer choice, however, seems further than ever before.



Conclusion

Our pre-2020 world was full of false certainties. If the last 12 months have taught us anything, it is that “impossible” and “unimaginable” no longer have a place in our collective vocabulary.

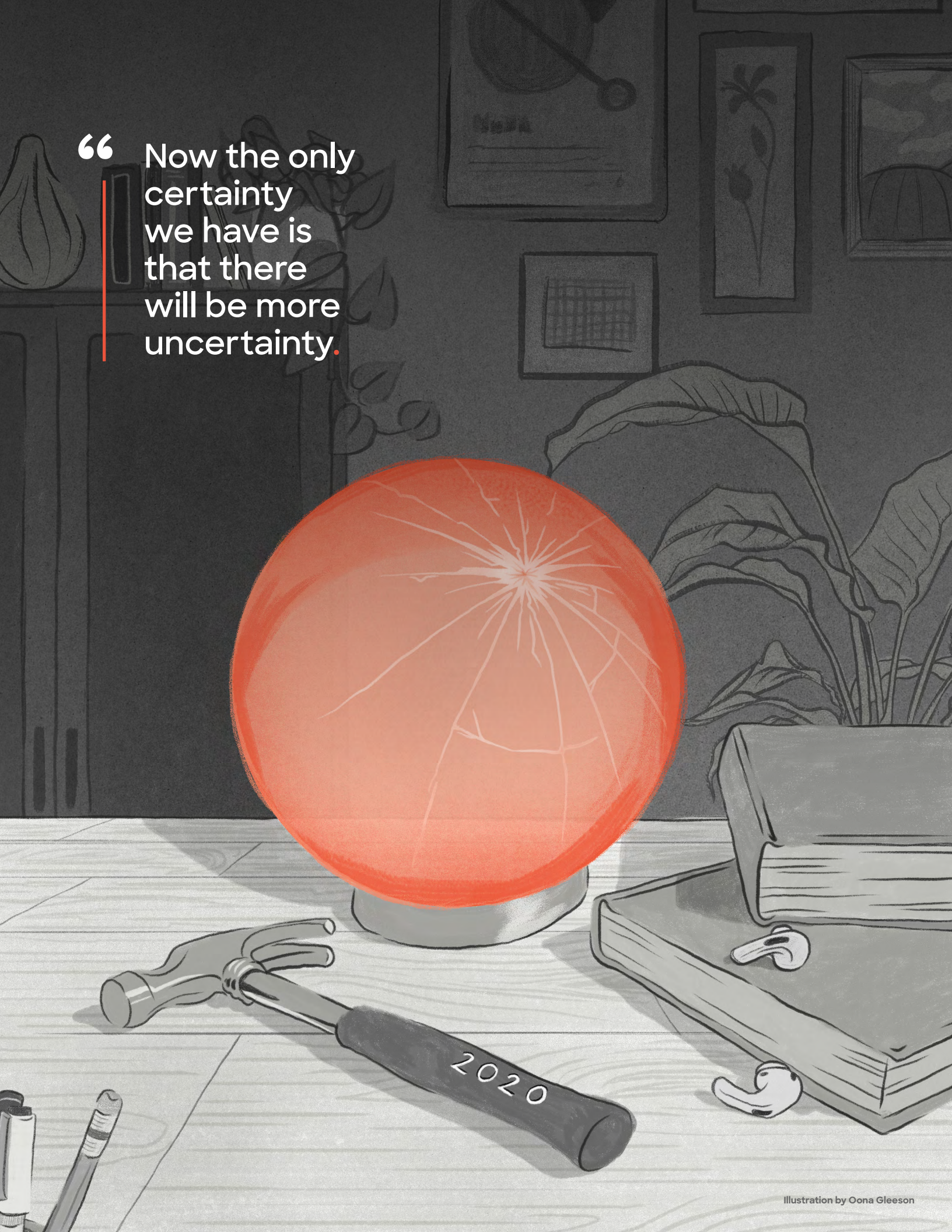
The global pandemic, the push to digital commerce and the social unrest of the past year have made the trajectories that already existed even clearer. If marketers want different futures, we must be purposeful in creating them or prepare for a world of bigger storms, more deadly viruses, and more tumultuous politics.

For brands, this requires a clear strategy to create and maintain competitive advantage in a future where these four dynamics now appear quite likely (again, there are few certainties!):

1. **Despite what felt like great shifts in 2020, the next decade will be more business as usual. The big and strong will get bigger and stronger. Companies without a clear mandate and path to the winner’s circle will be swallowed up.**
2. **Owning—or at least partnering with—platforms will be critical. If a brand doesn’t already own the customer end point (and therefore also control the journey), then building a platform or experimenting with different future scenarios are advised.**
3. **Increasing reliance on predictive models that depend on historical data could well leave us exposed to more black swan events like Covid-19. As machine learning teaches us to become more confident about what will happen, we must not forget to also prepare for what *could* happen.**
4. **We are entering a new, more nuanced era of mass marketing where brands will meld into customer experiences, with communications that are more relevant and tailored to the audience and moment. Marketers will need to maintain and project consistent brand values at the same time they meet consumer expectations for increasingly personalized messages and experiences.**

In short, buckle up. The consequences of the trajectories we find ourselves on are real and will become more real in the years ahead. At the same time, paradoxically, shared realities are rapidly fragmenting and our audiences are increasingly disabused that there are objective truths in advertising—or anything—anymore. Everyone is now their own first-person narrator crafting their own unique brand experience. Advertisers must act boldly with plans to put themselves at the center of people’s experiences if they want to make it to 2030.

“ Now the only
certainty
we have is
that there
will be more
uncertainty.”



List of Panel Experts

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Jane Bloomfield

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CEO at Australian Association of National Advertisers, World Federation of Advertisers Executive Committee member, GAICD

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essence

essenceglobal.com

Essence, part of GroupM, is a global data and measurement-driven agency whose mission is to make advertising more valuable to the world.

We help top brands earn valuable connections with their consumers.