Advertising in 2030

Selected quotes from our panelists

Shareable Quotes

Essence, a global data and measurement-driven agency which is part of GroupM, has released a unique report on the future of advertising based on the predictions of experts across academia, business, marketing, publishing, and advertising trade organizations around the world.

The study evaluates the likelihood of 15 different scenarios occurring over the next decade and assesses the implications of each for the future of advertising. Each scenario tested explores the influence of a key dynamic or catalyst, from the use of biometric data to personalization, privacy, artificial intelligence, virtual reality, regulation, payment models, and more.

Here are some shareable quotes from those experts, organized by category:

- **Data & Personalization**
- **Content, Creativity & Media**
- **Society, AI & The Future of Work**
- **Commerce & Payments**
- **Public Policy & Regulation**

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Data & Personalization

BIOMETRICS. Biometric data is standardized and commoditized to the extent that it is widely used to access, personalize, and/or secure data and services.

Dirk Stader, CFO at GroupM Germany
Data security at its best can only be provided by using biometric data. It's the only unique answer.

Federico de Nardis, CEO Sub Saharan Africa at GroupM
In Africa, the retail industry is very different than the Western and Asian world. Informal retail structures still dominate in most markets (80% in Nigeria). These countries are mobile first and mobile focused and if biometric data comes with mobile, it will have an economic relevance. There are fewer concerns about privacy.

Konrad Feldman, Co-founder and CEO at Quantcast
While increasingly used, there will be questions around privacy and security implications. I expect to see significant differences in different parts of the world with biometrics being used extensively in countries like China. Elsewhere, companies that provide a clear value proposition to consumers in terms of convenience will have an opportunity to become trusted brands in the biometric access space.

Vismay Sharma, Managing Director UK & Ireland at L'Oréal
Consumers will be able to have full control and provide access to their personal data to corporations depending upon the value exchange. Technologies like Blockchain will facilitate this as the interfaces become more sophisticated and adoption rates go up.

PERSONALIZATION. Everything is personalized to individuals based on chosen settings, historical data, genetic and medical information, and other sources.

Aaron Goldman, CMO at 4C
Consumers have an expectation of pervasive personalization in all experiences, especially content and commerce. By 2030 it won't just be an expectation, it will be a reality. When it comes to content and commerce, the delivery mechanism will be closed ecosystems that enable brands to insert themselves fluidly into the experience as a true value add.

PERSONALIZATION. (cont'd)

Allègre Hadida, University Senior Lecturer in Strategy at Cambridge Judge Business School

This will very much depend on individuals' willingness to contribute info and/or DNA in the first instance. Full personalisation is only possible when combined with full transparency and trust.

Christian Juhl, Global CEO at GroupM
One thing I've learned is that the rate of change even ten years out will be slower than we think it's going to be. In order for that to be happening you've got to retool every manufacturing facility in the world. You'd have to get consumer buy-in of for leveraging DNA and medical information. So that's far away.

Rob Norman, Director at Simpli.fi and Senior Advisor at GroupM

There'll be a third of the people for whom that is true and think it's a good idea, a third of the people for whom it will be true, but see it as a bad idea, and a third of the people for whom it won't be true.

PRIVACY. Governments and corporations have vast or total access to information about who people are (DNA and biometric data), what they do (GPS and communication data), and what they think/believe (search data, listening devices).

Jane Ostler, Global Head of Media Effectiveness, Insights Division, Kantar
Governments, certainly in many markets, are probably behind on using data and intelligence to inform policy developments or behavioral change and we know China is a really good example of somewhere where a lot of that data is being used. But in other countries privacy is paramount. But certainly there's the opportunity for governments to become smarter about how they use publicly available data, or more innovative in how they access and connect data, as long as it's for the benefit of citizens.

Konrad Feldman, Co-founder and CEO at Quantcast
Governments already have access to considerable amounts of personal data. With respect to corporations, consumers will have choice over which corporations have which data and for what purpose.

Content, Creativity & Media

AI. Companies rely on artificial intelligence to produce the majority of creative content including music, TV, movies, and art.

Cliff Kuang, Author of *User Friendly* and UX Designer at Google
Certainly AI might be used to tailor a movie to an audience, for example. The locus of creativity would then move from creating a fixed artifact, to creating a framework for an evolving or mutable artifact.

Dr. Veronica Barassi, Professor of Media and Communication Studies at the University of St. Gallen
I believe that AI's are not going to be able to learn the symbols in the same ways that humans learn symbols When we learn symbols and when we learn about life, we have different ways of understanding what is being taught to us. And one way in which we understand things and we learn things is through our bodies and through our lived experience. Creative energy stems from that embodied experience, which an AI won't have.

Gai Le Roy, CEO at IAB Australia
Although AI will help develop a lot of content and creative at scale and help efficiencies and will definitely play a huge role in informing & optimising creative, the human element of the creative process will still be front and centre.

Rob Middleton, Global Agency Alliances at Sprinklr
We'll probably see things we have never seen before. We'll see a new form of creativity that we couldn't have anticipated that will come from this, augmentation or even taking over.

Tobias Hefele, Director Programmatic and Platform at Weischer.Cinema
The first examples have already arrived in society. Whether Alexa, Echo or the Machine Learning product from Audi to calculate traffic light phases in real time. Partially autonomous driving due to ACC or lane assist and soon fully autonomous driving are indications of this. Why should it be different in the media and advertising companies?

AD BLOCKING. It is easy for individual consumers to eliminate all exposure to advertising from their daily lives.

Allègre Hadida, University Senior Lecturer in Strategy at Cambridge Judge Business School
Advertising will increasingly take subtler forms, such as product placement or sponsoring.

AD BLOCKING. (cont'd)

Jane Ostler, Global Head of Media Effectiveness, Insights Division, Kantar
I think that we see outdoor advertising, for example, having a resurgence - it will be driven more by personalization, and you can't really avoid outdoor advertising. Online, there will be probably other ways that we haven't thought of yet to avoid advertising. I do agree with the thesis that there will be people who will see more advertising because they are accessing free services, and I think there will be a bit of a divide actually. If you can afford to, you can avoid it.

Mahesh Sudhakaran, Chief Digital Officer at IBM Energy, Environment & Utilities
It won't be efficient for individuals to make the hundreds of daily decisions that advertisers seek to influence. AI will make more and more of those decisions, freeing up people to be more efficient, creative, and productive.

SOCIAL MEDIA. Most people use social media platforms privately while the public social space is dominated by promotional content, mainly from brands and public institutions.

Chris Copeland, Co-founder and CEO C2Next
Social platforms as conceived today will not exist in a decade. Within two to three years the backlash against influence and social posturing combined with the toxic nature of bots will lead to a sharp turn to alternate behaviors. It's possible private becomes the new model but dual social structures feels unlikely.

Federico de Nardis, CEO Sub Saharan Africa at GroupM
People in Africa, and elsewhere, they like to have a say. That's why they use social media. It's not just about their friends, they want the piazza. By 2050, 35% of all those below age 20 will live in Africa, and the continent will represent 41% of new babies born worldwide according to Gapminder. It is the only area in the world where the population is still increasing substantially. Much of the population here is below age 30 making the approach totally different versus the older Western world.

Miranda Dimopoulos, Regional CEO at IAB Southeast Asia and India
I see this potentially going the other way - people's lives are all public and those with the most influence will rule. There will be no D2C, it will all be affiliate based. Those wishing to not participate will live off the grid in privacy enclaves.

Society, AI & The Future of Work

AUTOMATION AND THE ECONOMY. A reduction in working hours and wages due to the application of artificial intelligence and automation lowers consumer purchasing power.

Devin Cook, The MIT Initiative on the Digital Economy at MIT Sloan School of Management
We're at a cognitive point in the conversation around how artificial intelligence is affecting work. Meaning that we're not seeing the gains in productivity for knowledge workers necessarily translating into higher wages and fewer working hours. In fact, it's translating into lower wages and longer working hours. We're now forced to confront the critical question, "Well, how do we harness technology in a way that is going to get us to the ideal work environment that we all have been dreaming of since the dawn of the industrial age?"

Federico de Nardis, CEO Sub Saharan Africa at GroupM
In Africa, the cost of labor is so low, there are many tasks that a company might automate in other regions, but not here because the cost of investing in automation is higher than the labor costs. In Europe, Italy on the other hand, I can definitely see this happening. Automation will reduce the cost of the product, so that hopefully even with lower incomes people will be able to afford those goods.

Jane Ostler, Global Head of Media Effectiveness, Insights Division, Kantar
Behind the scenes automation of processes will accelerate much more quickly than we may imagine today. There are many jobs that could disappear as a result, and we've already seen some countries considering solutions such as a four-day work week. It's actually quite a radical shift in how economies pay for their labor and support people who don't work full time. How do they afford their food? How do they afford to live? What does a universal basic income look like? That's a massive issue for all countries. I think those questions will need to be answered in the next ten years.

Peter Petermann, Chief Strategy Officer at Wavemaker Germany
Fundamentally, I am an optimist. Thus, I strongly believe that (1st world) societies will have solved this problem by 2030. There probably will be a short dip during the paradigm shift that is bound to happen as AI takes over certain tasks. But new jobs will arise and I am positive that wages will be compensated -- after all, having enough individual purchasing power is in the best interest of corporations AND governments and therefore will be taken care of.

AUTOMATION AND THE ECONOMY. (cont'd)

Michael Hayes, Founder PalmariWorks, previously Chief of Digital at Initiative Worldwide

There is a long, long way to go before truck drivers are eliminated completely. You're not going to have 80 percent of the cars or trucks on the road in 10 years being self-driving. We will have artificial intelligence doing some things very well: reading contracts faster than an attorney can, or analyzing an MRI and spotting inconsistencies better than a radiologist. And yes, there will be more kiosks at fast food restaurants, but I don't believe that will be enough to materially move the dial with respect to widespread employment implications. Further, populations in developed nations are shrinking, and many companies are already struggling to fill jobs, so I don't see this happening within a 10 year window.

BOT-TO-BOT. Most interaction between brands and consumers is bot-to-bot with personal digital assistants interfacing directly with customer service bots or virtual representatives.

Aaron Shapiro, CEO at A Stealth Company, former CEO at Huge
As bots become more useful they will take over more and more of the menial tasks now done by consumers, which will include more and more purchasing decisions.

Andrew Stephen, L'Oréal Professor of Marketing and Associate Dean for Research at Oxford Saïd Business School
If there's a barrier to this, it's going to be consumer adoption, because it requires letting go and trust in the technology and the system. Probably three, four years ago, people would say, "Yeah, no way am I going to talk to the speaker in my living room and rely on it to do stuff for me." But they do. Typical technology diffusion will happen and in 10 years, this is definitely plausible.

Charlotte McEleny, Publisher APAC at The Drum
People will still want some choice and serendipity, but anything that saves time and effort, and reduces any time on a call with a brand would be welcomed.

Peter Petermann, Chief Strategy Officer at Wavemaker Germany
The technology is already here and we will see the proliferation of PDA-to-CSB communication sooner rather than later. This trend will even go beyond using voice commands (e.g. Alexa) to totally automated purchase routines. Incidentally, this increase in data-driven consumerism will open the door to AI-based New Retail with predictive production & distribution cycles and even predictive pricing.

VIRTUAL REALITY. People spend more time interacting with virtual worlds than the physical one

Cliff Kuang, Author of *User Friendly* and UX Designer at Google
It's possible that digital worlds such as Instagram and TikTok demand more time. But it's also possible that digital embeddings into the physical world create new experiences that make the purely digital world less appealing. Imagine, for example, a world of technology geared towards being together in a group—for games, entertainment, in the home—rather than solitary, person-to-phone interactions.

Douglas Grinspan, Chief Industry Officer, Head of Revenue - Technology, Business and Finance at Condé Nast
In any given day, if you're reading this report, you likely spend as much if not more time on email, in browsers, in apps, in gaming environments, in all the digital tributaries afforded you than you do interacting, face to face, or via live calls. But on the other side of those virtual worlds, or by your virtual side within them, are other individuals. How we frame personal and professional interaction changes over time... and the physicality behind these changes lessens, no doubt.

Gai Le Roy, CEO at IAB Australia
I think in many instances we already do. The increase in virtual time will be liberating as well as positive for the environment - less unnecessary travel for work whether that be day to day commuting or environmentally unfriendly corporate travel, but as always human mental health is reliant on strong connections with other people as well as staying healthy and physically fit so this change in interactions must be managed with care.

Jane Bloomfield, Chief Growth Officer UK at Kantar
There is a concern and ubiquitous feeling of technology taking over. I think we will have a post-technological innovation culture where people are looking less for mass technology and more for the physical world and physical experiences. Within the next 10 years we'll see a peak of the virtual world and then people beginning to come out the other side of it. We haven't peaked yet, people aren't quite overwhelmed and oversaturated yet as they will be.

Michael Hayes, Founder PalmariWorks, previously Chief of Digital at Initiative Worldwide
Our mobile devices are changing the quality of our human interactions. There's going to be a pendulum shift in reaction to the uptick in loneliness and suicides. People are missing authentic human connectivity; the tangibility of face-to-face communication, and the power of interpersonal relationships.

Commerce & Payments

SUBSCRIPTIONS. Most products and services are purchased as part of individual or bundled subscriptions.

Janet Balis, Partner, Global Advisory Leader for Media & Entertainment and Americas Marketing Practice Leader at EY
We will continue to see more hybridization between physical and digital subscription bundles where the physical experience is enhanced with digitally-purchased subscriptions.

Justin Merickel, VP Media Optimizer at Adobe
It elevates what the brand has to deliver in terms of knowing that customer and delivering a consistent experience over time, rather than a one-off product sale. So it does change the requirements on a brand, but I think you'll continue to see more and more emphasis on subscriptions.

Matt Pollington, Head of Digital at Sky
The concept of a weekly shop will be obsolete in 2030.

Vismay Sharma, Managing Director UK & Ireland at L'Oréal
Products and services are likely to be bought individually, (hyper)customised to the needs of a consumer through their personal assistants (bots). This is not necessarily subscriptions as we know them today though they could be preferred sources for products and services.

3D PRINTING. Consumers have embraced 3D printed alternatives to mass-produced products.

Jane Bloomfield, Chief Growth Officer UK at Kantar
I've seen some marvelous applications in developing markets and countries where you just got to think will be game changers for people. Little things like valves for wells to access water. If you're waiting on parts being delivered from somewhere, you could just print it!

Miranda Dimopoulos, Regional CEO at IAB Southeast Asia and India
This is already starting to happen. I foresee 3D printers being as commonplace in the home as fridges.

Peter Petermann, Chief Strategy Officer at Wavemaker Germany
Personalization at scale will be one of the key drivers of future consumerism and 3D printing will be one way to make this happen. I don't think that personalized products will replace mass products entirely -- for many things personalization is simply not necessary. But I do think that we will see a significant increase of 3D printed products.

MICROPAYMENTS. Publishers have embraced seamless micropayments as a meaningful alternative to subscription and advertising revenue.

Federico de Nardis, CEO Sub Saharan Africa at GroupM
In Africa, mobile users are happy to pay for a specific film, sport event, etc., but they often don't have the money for a full subscription. 10 years is a long time and things will have to change dramatically. Banks are already under threat by new fintech companies.

Public Policy & Regulation

REGULATION. A single global approach to consumer privacy and identity has replaced regional regulatory approaches.

Janet Balis, Partner, Global Advisory Leader for Media & Entertainment and Americas Marketing Practice Leader at EY
In an ideal world, there is no question that a universal framework for consumer data privacy and regulation would benefit government, consumers and businesses (if structured properly). However, the likelihood is that the federated nature of this issue in the US alone won't even let this be a national issue in this critical economy. Currently, an institution like the UN seems unlikely to facilitate alignment on this type of issue, given the magnitude of other global challenges they face, let alone sufficiently understand the 'network' effects – both cost and benefit – of regulating these complex data and technological issues appropriately.

PLATFORM SUSTAINABILITY. Today's leading internet-based service providers, platforms and social media companies remain intact as global consolidated entities.

Chris Copeland, Co-founder and CEO at C2Next
It is more likely that the giants of today become the holding companies of tomorrow, continuing to use their scale and cash reserves to acquire challengers rather than remaining individually dominant players.

Rob Middleton, Global Agency Alliances at Sprinklr
I don't think we can predict this. ExxonMobil was the most valuable company in the world in 2012, and now they're almost falling out of the Dow. Few people saw that coming. Who would've thought the world's leading oil producer would lose $200 billion in market value in just eight years. The rise of new companies is happening faster and faster; who's to know whether the same players will be on top in 10 years' time.

THE ENVIRONMENT. Environmental impact is as important as price in consumer purchase decision making for both goods and services.

Andrew Stephen, L'Oréal Professor of Marketing and Associate Dean for Research at Oxford Saïd Business School
Looking at all of the brand data related to purpose, and sustainability, and environmental aspects—these indices have gone from basically having no impact on brand value to massive impact, just in the last two years. I don't know whether environmental consideration will overtake price, but it's going to be in the top three decision drivers on average for a lot of consumers.

Chris Copeland, Co-founder and CEO at C2Next
In what should be a 10, the answer will remain low. This is due to the increasing economic disparity which does not allow for choice to be based on anything else but price.

Federico de Nardis, CEO Sub Saharan Africa at GroupM
Environmental impact isn't currently an issue being driven by consumers in Sub-Saharan Africa, instead the pressure is coming from a small elite, corporations, and increasingly governments. But it will grown over the next decade in consumer consciousness and pressure.

Janet Balis, Partner, Global Advisory Leader for Media & Entertainment and Americas Marketing Practice Leader at EY
"Change happens gradually, then suddenly" will become true in no space more than climate change and the environment. When the crisis is even more acute (which will be in the next decade), consumers will make environmental impact an even more critical component of their consumer choices. It won't simply be a generational consciousness dimension as it is today but a universal imperative regardless of political preference.

Peter Petermann, Chief Strategy Officer at Wavemaker Germany
Absolutely: the next 10 years belong to GenZ who will drive culture, consumerism and companies in that direction. Companies that don't adhere to these codes (and even stricter ones in the years to come) will simply vanish.

Brian Wieser, Global President Business Intelligence at GroupM
The ultimate issue in sustainability for brands is making sure that they are concurrently capital efficient and efficient in providing consumers with the products and experiences they want to pay for. That can mean limited waste – defined rightly or wrongly – in spending on marketing as well as limited waste in producing and distributing products.