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MARKETING PRIORITIES 2017

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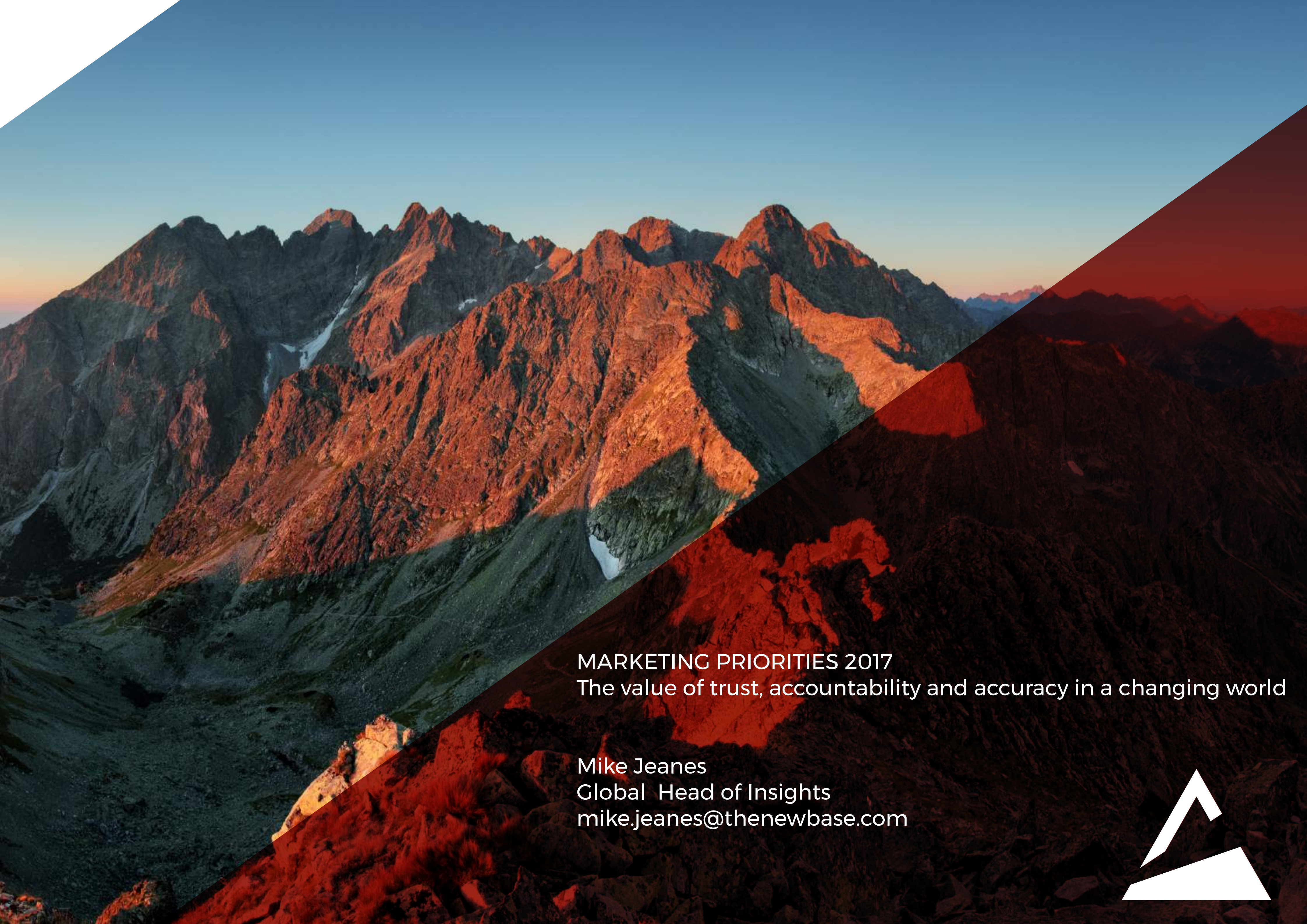

MARKETING PRIORITIES 2017
The value of trust, accountability and accuracy in a changing world

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Introduction

In a rapidly changing media world, as marketers, we need to keep up with what is going on around us, track consumer behaviour and technology developments, and watch where the advertising dollars are moving. It is also essential that we understand the priorities of brand marketers, agencies and publishers alike, and build our marketing strategies accordingly. However, in such a dynamic environment, marketers often shelve 'priorities of the moment' as quickly as they move on to focus on new industry issues. This is particularly evident in the Marketing Priorities 2017 results. In the last 12 months, the media and marketing landscape has witnessed significant disruption. Marketers are striving to discover new and innovative ways to engage with consumers and address the challenges created by ad blocking, brand safety issues, fake news and ad fraud. 2017 has already been labelled a 'year of change' by some marketers, also a year of greater collaboration and increased transparency, and a year to focus on trust – trusted tech suppliers, trusted advertising environments and trusted data.

NEWBASE Marketing Priorities 2017

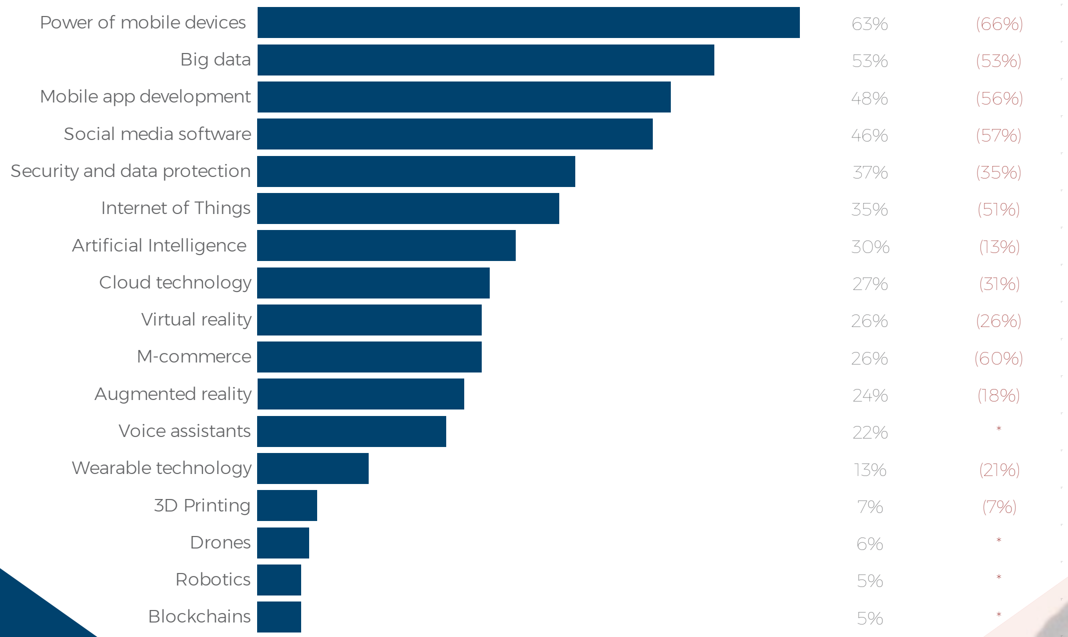
Marketing Priorities 2017 is the second global survey of over 1,000 brand marketers, agencies and publishers. The survey, fielded between March and April 2017, evaluates advertising budget shifts, and identifies which platforms and formats are growing, or declining. It also quantifies many of the conversations and considerations in the media and marketing sector, as well as ranking the key marketing and tech issues shaping the industry into the future. Many of the results can be tracked against 2016, and new themes and considerations have been added in 2017 to reflect current industry talking points.

Where is the ad money moving?

Results from Marketing Priorities 2017 closely reflect Zenith global ad forecasts. Print continues to suffer, with two thirds of global brand marketers and agencies expecting to decrease print investment in the next 12 months. Growing disruption within the TV sector is causing uncertainty among global brand marketers and agencies, as the proportion intending to increase TV ad spend dropped from 29% in 2016, to 22% in 2017.

Mobile registers the highest anticipated advertising budget growth in 2017, with 85% of agencies and brand marketers across the globe expecting to increase ad spend in the next 12 months. Turning to digital ad formats, more global executives are likely to increase their investment in social media and mobile web than any other format (83% and 78% respectively). However, despite the estimated decline for TV, 74% of global brand marketers and agencies plan to increase spend on digital video. This is followed by location based ads (63%), and Native advertising (62%). Email registered the lowest proportion who envisage an increase (36%), although this percentage is still higher than those indicating a decrease (31%).

Top 15 Global Technology Priorities 2017 (vs. 2016)



Q. Which do you consider to be the TOP FIVE marketing priorities for the media industry in the next 12 months?

* not asked in 2016

Technology Priorities 2017

Projected growth in digital ad spend is dictated by advancements in hardware, software and tech solutions. In 2017, 63% of global marketers identified the Power of mobile devices as the primary technology factor likely to impact their business in the next 12 months. This is the #1 Technology Priority among global marketers (out of 17 attributes measured), and dominates across all regions and sectors.

> “Mobile registers the highest anticipated advertising budget growth in 2017, with 85% of agencies and brand marketers across the globe expecting to increase ad spend in the next 12 months.”

> “Arguably, the success of any digital ad campaign is more reliant on the data used for targeting, optimisation and delivery, than on the ad creative.”

Big data ranks #2 in the global Technology Priorities list in 2017, scoring 53% and results are consistently high across all regions and sectors. Data is the essential ingredient for almost every innovation within the media and marketing industry. Arguably, the success of any digital ad campaign is more dependent on the data applied to targeting, optimisation and delivery, than on the ad creative itself. Ultimately it is data that enables ad platform partners to deliver the right ad, to the right user, at the right time. It also plays a pivotal role in the tracking and measurement of campaign performance and providing insights The full potential of big data within the marketing and media sector is still unrealised and in fact 91% of global marketers agree that “The digital marketing sector is under exploiting the insights it can derive from big data”.

Mobile app development and social media software ranks #3 and #4 in the Technology Priorities list among global marketers, although both attributes have decreased in importance since 2016. With constant reports of cyber security breaches, current discussions around brand safety, fake news, and fraudulent traffic, it is no surprise that security and data protection increases its Technology Priorities ranking among global marketers from #7 (35%) in 2016, to #5 (37%) in 2017.

> “AI and the advanced use of algorithms will ultimately shape the future of the global advertising landscape.”

Artificial intelligence (AI) registers the most significant technology uplift in 2017, growing from 13% (#12 out of 14 attributes) in 2016, to 30% (#7) in 2017. Technology Priorities rankings and scores for AI are higher in EMEA and Americas or compared with APAC, and interestingly, agency executives consider AI a much higher priority (34%) than publishers (23%), and brand marketers (29%). AI and the advanced use of algorithms will ultimately shape the future of the global advertising landscape. It feeds very directly into many marketing functions and processes including ROI and accountability, ad personalization, voice assistants and programmatic. AI has certainly replaced some of the ‘more mundane’ planning processes on the agency side in particular, including a range of booking, trafficking and reporting functions. There is growing concern among global marketers in 2017 over the impact of AI on jobs security with 28% of global marketers ‘strongly agreeing’ that ‘AI will never replace the job I do’ decreasing from 37% in 2016. AI is effectively a ‘tool’ and whilst it may threaten jobs in some areas, it opens new opportunities for progress in others, freeing up time for more creative thinking and servicing clients with human brain-power, and importantly, empathy.

> "Perhaps the true potential for virtual reality and Augmented reality has not yet been fully realised."

> "Voice Assistants could change the way we interact with, and purchase brands."

As the Internet of Things (IoT) becomes more and more embedded in home, work and industry, it has continued to evolve in specialist areas, which is making the all-encompassing term Internet of Things less relevant in today's world. In 2017, 35% of global marketers consider the IoT a key technology factor likely to impact their business in the next 12 months, ranking #6 in the Technology Priorities list. However, this has fallen from 51% in 2016, with scores declining across all regions and sectors. There is also a downturn for Wearable technology, in the global Technology Priorities list, dropping from 21% in 2016, to 13% in 2017. Whilst growth in fitness wearables may have encouraged some revived interest in Wearable technology in 2016, the excitement initially created in 2013 around bands, watches, earpieces and glasses appears to be diminishing.

Moving onto immersive formats, perhaps the true potential for Virtual reality and Augmented reality has not yet been fully realised. Some argue that these technologies could be the drivers for a screenless world in the future. But for now, whilst we have seen an increase for Augmented reality in the global Technologies Priorities list (24% in 2017 vs. 18% in 2016), Virtual reality remains unchanged with 26%.

Voice Assistants is a new entry in the 2017 Technology Priorities list and ranks #12 among global marketers. Scores are fairly consistent across regions, but significantly higher for agencies (29%), compared to brand marketers (18%) and publishers (17%). From an advertising perspective, with global saturation of mobile device ownership, voice recognition and new conversation interfaces such as Amazon Alexa and Google Home, provide marketers with a new extension to digital cross-platform communications, reaching audiences in new situations through speech. Conversation tech and voice driven digital interactions will continue to grow in 2017 and beyond. As Voice Assistants become more established, they could be well placed to thrive in a potential screenless world, and importantly, change the way we interact with, and purchase brands.

M-commerce registers the biggest year-on-year decline in the global Technology Priorities list, falling from 60% in 2016 (#2), to 26% (#10), and this pattern translates across all regions and sectors. The M-commerce revolution is yesterday's news, and is now the accepted norm. The rise of major players like Amazon have made the process of purchasing via a mobile device more efficient and engaging worldwide, and transactions via a mobile device now outstrip desktop in some markets. In today's world, consumers adopt new technologies that are easy to use and will make their lives easier, and as voice-tech and associated interfaces become more established, Voice Assistants could offer an alternative to screen transactions in the future.

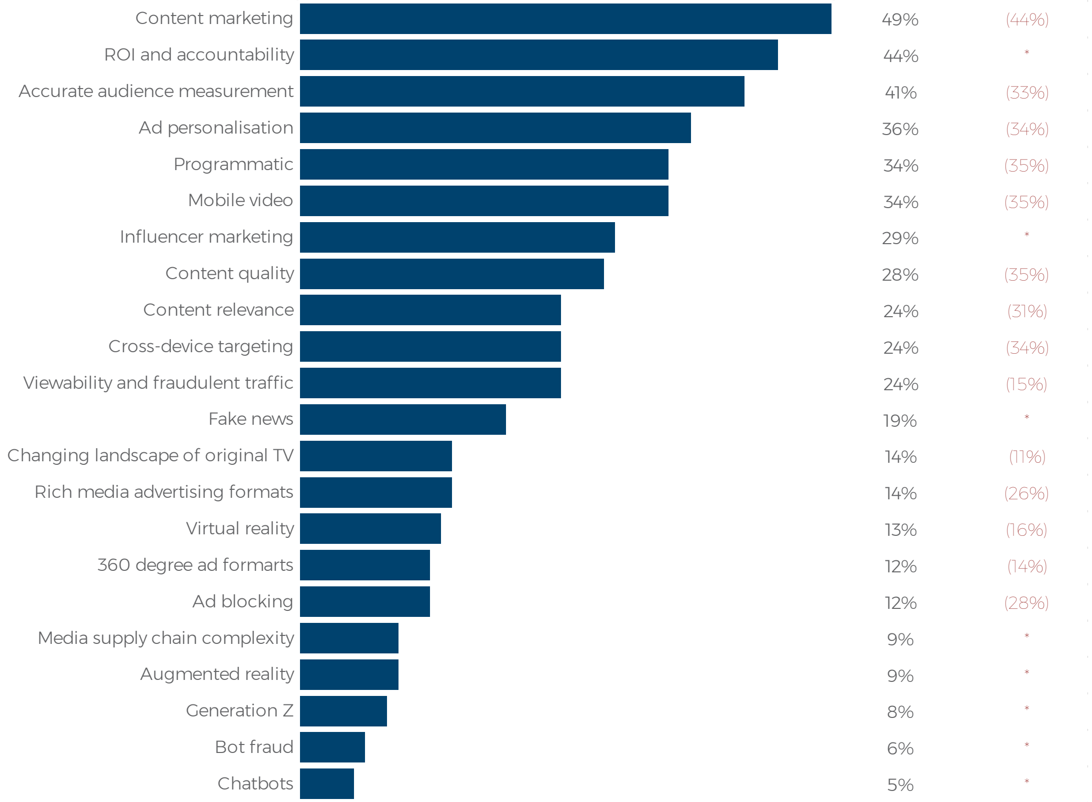
Marketing Priorities 2017

2017 has already been cited as a 'year of change' by many marketers. Out of a list of 22 media and marketing trends measured on Marketing Priorities 2017, a new set of themes and priorities have emerged compared with 2016. These revolve around audience measurement, accountability, personalised content, a rekindled focus on trust, and greater transparency and collaboration across the industry. This section reviews the global 'Top ten' marketing considerations, offers an opinion on each priority, showcases key differences by region or sector, and highlights any interesting year-on-year shifts.

The top 15 Marketing Priorities ranking by sector and region are available in the appendix.

> “2017 has already been cited as a 'year of change' by many marketers.”

Top 15 Global Marketing Priorities 2017 (vs. 2016)



Q. Which do you consider to be the TOP FIVE marketing priorities for the media industry in the next 12 months?

* not asked in 2016

#1 Content marketing

Although Content marketing remains the number one marketing consideration globally (49%) in 2017 (increasing from 44% in 2016), its dominance across all regions and sectors in 2016 has been squeezed. In APAC, Content marketing remains #1 in 2017, whilst in EMEA it ranks #2 (behind Programmatic) and #2 in Americas, behind ROI and accountability.

Whilst content related attributes occupied all top three Marketing Priorities rankings among brand marketers in 2016, the emphasis on content has fallen in 2017, with Content marketing dropping from 43% (#1) in 2016, to 38% (#4) in 2017. This is not an indication that Content marketing is no longer important for brands, but simply that there is now an acceptance that relevant and engaging content is a necessity in order to capture, and retain consumer interest.

In addition, many brand marketers now have clearer strategies (often with their own teams in place), to manage and control the content production and distribution process more effectively, and are now focusing more pressing priorities.

> “Content marketing is being driven by publishers in 2017.”

Content marketing is being driven by publishers in 2017, where this leading focus has increased significantly from 45% in 2016, to 61% in 2017. This aligns with a wave of increased investment in content-led services within many publishing houses and could explain why nine in ten publisher execs ‘agree’ and 35% ‘strongly agree’ that ‘Content marketing is forcing structural change within the media/marketing sector’ (29% for agencies and 30% among brand marketers).

#2 ROI and accountability

The importance of accountability has been a significant topic for the media and marketing industry for decades, but there has recently been a refocus on its relevance, which is why it has been added to the Marketing Priorities list in 2017. This high interest in accountability in 2017 is endorsed by 93% of global marketers who ‘agree’ and 53% who ‘strongly agree’ that ‘ROI and accountability is more important than ever’. A higher proportion of marketers in Americas ‘strongly agree’ with this statement (58%), compared to about half in EMEA and APAC. In 2017, ROI and accountability is the second highest marketing consideration among all global marketers (44%), and tops the table in Americas. Importantly, it ranks #1 in the Marketing Priorities list among brand marketers (55%) and agencies (48%), but much further down the list for publishers, ranking #7 (29%) - and arguably, this is the sector that is ultimately responsible for delivering audience, sales results, and campaign success.

#3 Accurate audience measurement

Accurate audience measurement ranks #3 in the 2017 Marketing Priorities list scoring 41% among global marketers (33% in 2016) and registers one of the highest year-on-year increases. Driven by technology advancements, people are constantly changing the way they consume and interact with traditional and digital media. 84% of global marketers agree that "Understanding cross platform audiences is a challenge" and at the same time, 88% of global marketers admit that 'Technology change is increasing at a faster pace than our ability to track it'.

Many traditional audience measurement metrics used for decades are still the main currencies today, and there is a lack of consistent measures across regions, countries, media platforms, formats and distribution networks. On the digital side, although some industry bodies are working hard to set standards and verification processes for viewability and other metrics, there are still many inconsistencies in the way data is collected, processed and disseminated. One of the biggest challenges for the industry in this area is tackling 'publisher self-reporting', and this is fuelling a push for standardised reporting. The industry needs accepted metrics that are reliable, independent and trustworthy, and this is endorsed by 90% of global marketers agree that 'There is a need for a 3rd party standard digital audience verification measure.' But who should be responsible for the introduction and control of a standard measure? 54% of global marketers feel that industry bodies should be responsible, followed by 40% identifying agencies, 39% publishers, 37% media consultants, and 31% brands.

> "90% of global marketers agree that 'There is a need for a 3rd party standard digital audience verification measure'."

#4 Ad personalisation

Ad personalisation ranks #4 among global marketers in 2017 scoring 36%, and increasing from 34% in 2016. This high priority is being driven by the need to deliver 'ever more' relevant and 'ever more' personalised content to consumers, in the right format, at the right time, via the right distribution channel. And it is mobile, (the most intimate and accessible communications platform of all) that offers the greatest opportunity for driving the growth of personalised content and advertising.

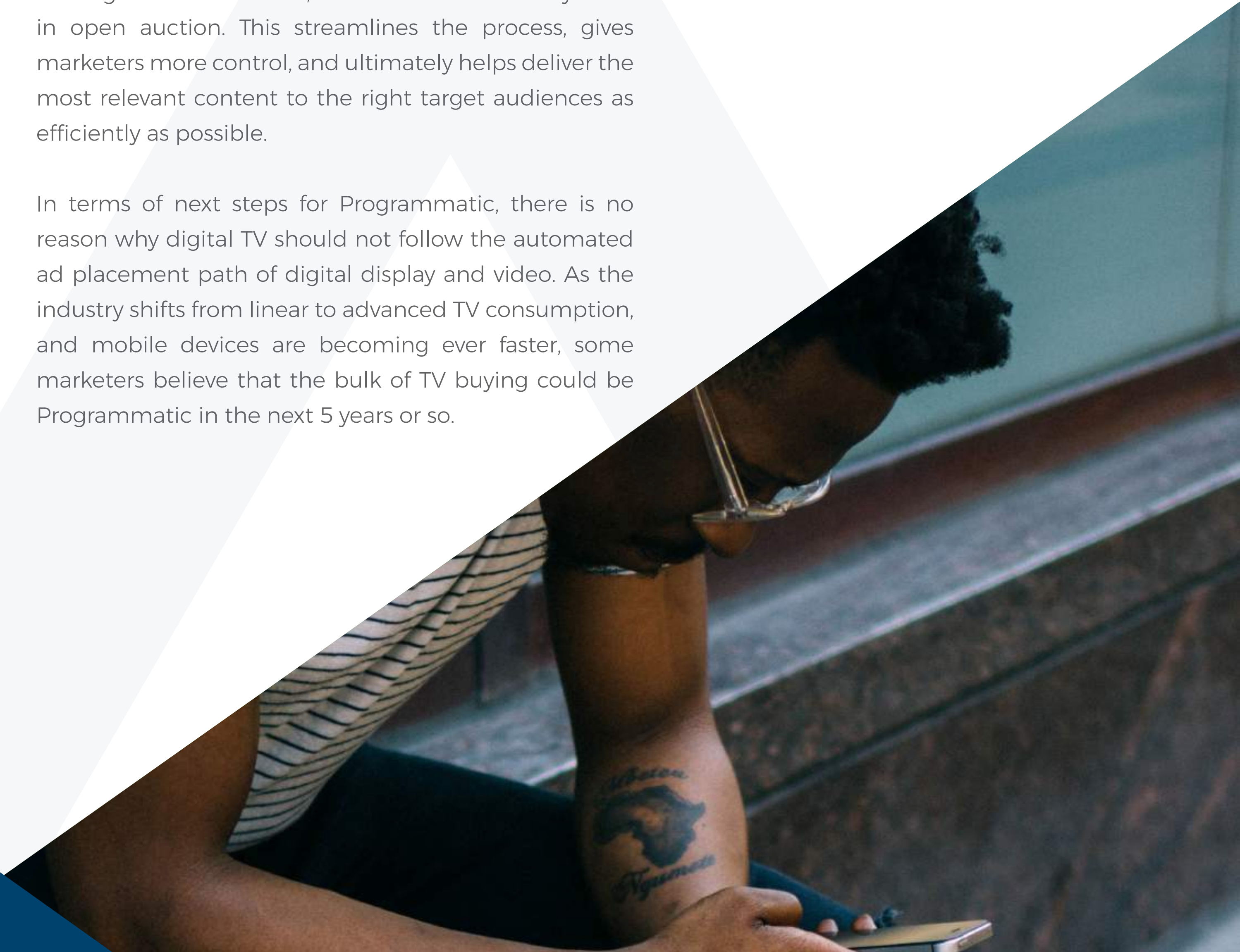
Digital retargeting is now very precise by tracking browsing history using cookies, or collating user data based on content consumption, interests and interactions. Other targeting approaches such as real-time bidding and programmatic offer more generic targeted solutions by demographic, region or country using IP addresses. Striving to deliver ever more relevant content to defined consumer segments, it is not surprising that brand marketers rank Ad personalisation #2 in the global Marketing Priorities list scoring 45%, whilst agencies and publishers rank Ad personalisation #5, registering 35% and 30% respectively.

#5 Programmatic

Display advertising purchased programmatically now represents well over half of all global digital display ad spend and its share is set to grow. This could explain why Programmatic ranks #5 in the global Marketing Priorities list (34%) and also why 73% of global marketers agree that "Automation of workflow and processes is now mainstream". Importantly, Programmatic is being fuelled by EMEA, where it now ranks #1 ahead of Content marketing. Among agencies and publishers, Programmatic ranks #3 and #4 in the Marketing Priorities global list respectively, although for brand marketers the ranking is lower (#8). On the brand-side, the programmatic function often sits within sales planning teams rather than brand marketing, and some brand marketers have concerns that programmatic does not deliver sufficient ROI for their advertising and marketing efforts.

Although Programmatic has received some bad press recently over viewability, brand safety, and supply chain transparency, more global marketers are embracing the benefits that Programmatic can offer, and stakeholders throughout the supply chain are now being challenged to provide clarity and simplicity. Programmatic is also shifting to direct deals, rather than inventory sold in open auction. This streamlines the process, gives marketers more control, and ultimately helps deliver the most relevant content to the right target audiences as efficiently as possible.

In terms of next steps for Programmatic, there is no reason why digital TV should not follow the automated ad placement path of digital display and video. As the industry shifts from linear to advanced TV consumption, and mobile devices are becoming ever faster, some marketers believe that the bulk of TV buying could be Programmatic in the next 5 years or so.



#6 Mobile Video

In 2017, mobile video ranks #6 among global marketers in the Marketing Priorities list. This is no surprise since video content consumption via a mobile device continues to rocket, and the increasing speed of mobile devices is opening up new opportunities for video. Mobile web and video are also two of the highest scoring advertising formats to increase advertising spend among brand and agency marketers. These projections are being fuelled by the growing interest in engaging video formats such as outstream, the growth of programmatic, and the increased integration of video into mobile content marketing strategies. Continued advertising growth could also explain why publishers rank mobile video the third highest marketing priority with 42%, compared to brand marketers, registering 24% (#9) and agencies, 33% (#6). Mobile video also scores higher in APAC (40%), compared to EMEA (28%) and Americas (33%).

#7 Influencer marketing

Influencer marketing is a new entry in 2017 and ranks #7 in the global Marketing Priorities list, and is higher for publishers and brands (both #6) than agencies (#10). Influencer marketing is a sub-set of earned media and, although nothing new, it has recently seen a dramatic increase in popularity among global marketers, primarily driven by the explosion of social media which is where these influencers primarily operate. Partnering with a 'trusted' influencer provides a mechanism for 'personalised branding' that in turn, can help influence brand opinion and build brand trust among followers. It is also an attractive approach for marketers since it has the potential to engage the ad blockers! Whilst Influencer marketing is an important part of the earned media mix, it should be integrated into broader marketing and social strategies, and not used as a stand-alone target marketing solution. In fact, almost two thirds of global marketers agree that 'Influencer marketing is a short-term tactic rather than a long-term strategy'.

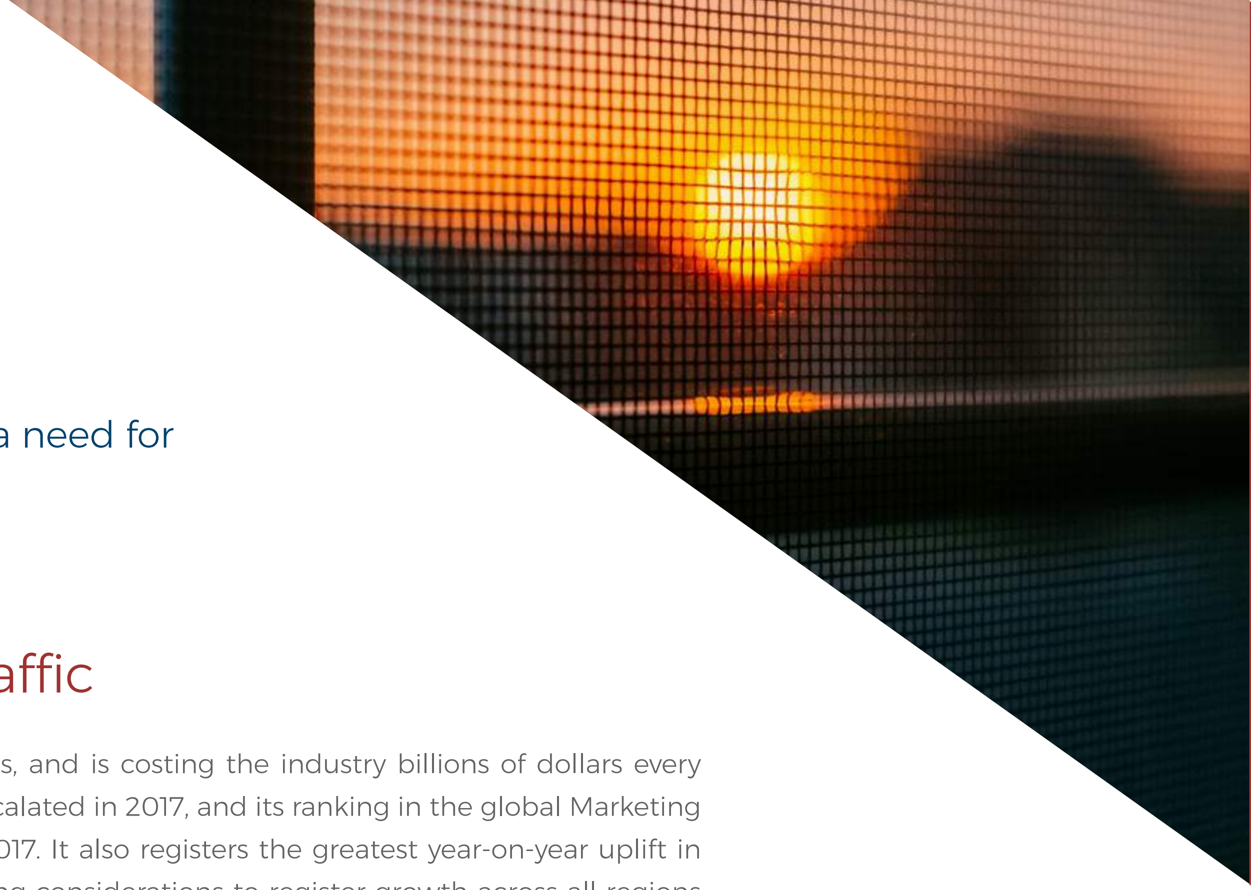
> "Partnering with a 'trusted' influencer provides a mechanism for 'personalised branding'."

#8 Content quality

In 2016, the Marketing Priorities global rankings were dominated by content-led attributes with Content quality ranking #2 behind Content marketing and among brand marketers in particular, the focus on content was most prevalent. The industry now accepts that quality is important, and the higher the quality of content, the more likely it is to attract and engage consumers, help build loyalty, and encourage an advertising response. Whilst quality of content remains hugely important, the industry has moved on to focus on other priorities in 2017. Thus, Content quality has slipped to #8 in the global Marketing Priorities rankings as global marketers are now more focused on the mechanisms, processes and ad tech required to deliver this to the right audience, in a timely and efficient manner.

#9 Cross-device targeting

The next three rankings (#9 to #11) all score 24% in the 2017 Marketing Priorities list. Cross-device targeting ranks #10 in 2017, scoring 24%, but has declined from 34% in 2016, and this downturn is evident across all regions and sectors. This result does not suggest that cross-device targeting is no longer important, but could reflect the advancements that have been made in this area in the last 12 months. There is now greater appreciation and acceptance within the industry that in order to reach the right target audience, at the right time via the right device, an optimised and tightly managed digital supply chain is required using an appropriate technology stack that can provide a seamless, cross-device content delivery service for the consumer.



“96% of global marketers agree that there is a need for greater collaboration across the industry.”

#10 Viewability and fraudulent traffic

Click fraud and bot traffic is distorting accurate traffic measures, and is costing the industry billions of dollars every year. The debate around Viewability and fraudulent traffic has escalated in 2017, and its ranking in the global Marketing Priorities list increased from #14 (15%) in 2016, to #11 (24%) in 2017. It also registers the greatest year-on-year uplift in interest among global marketers, and is one of the few marketing considerations to register growth across all regions and sectors. Importantly, among brand marketers, Viewability and fraudulent traffic was one of the lowest scoring priorities in 2016 (8%), and this increased almost threefold to 20% in 2017. The rising trend in programmatic-direct deals is a positive step that provides stakeholders across all sectors with greater control of the supply chain, helping to reduce Ad fraud, and improve viewability. Ad fraud is an ongoing problem, and the majority of global marketers (60%) feel that industry bodies should be responsible for addressing the issues of Ad fraud, followed by publishers (48%), agencies (47%) and brands (40%). Progress is already being made by several non-profit organisations to counter Ad fraud (including the Media Rating Council and Trustworthy Accountability Group), but there is still some way to go and the industry needs to work together on these issues. Encouragingly, 96% of global marketers agree that there is a need for greater collaboration across the industry.

Turning to viewability reporting, there are significant differences in the way publishers process and disseminate the data, and these vary from one source to another which makes it increasingly difficult for marketers to obtain an accurate measure of campaign performance. This explains why there is high demand to standardise viewability and other metrics.

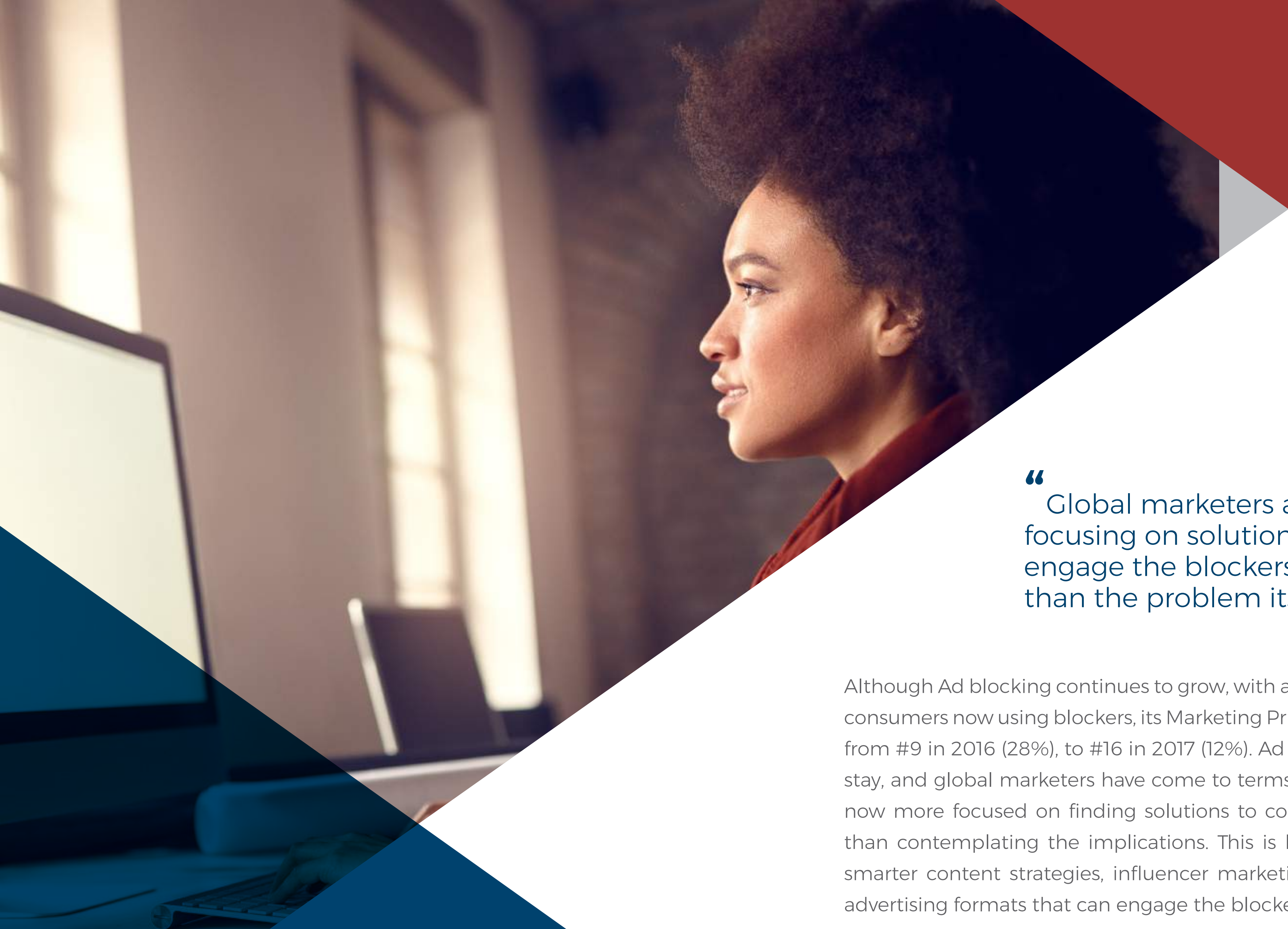
#11 Content relevance

Content relevance drops from 31% in 2016, to 24% in 2017. This downturn for relevant content is not a 'flee from relevance', but an indication that the term Content relevance is perhaps now too broad in today's marketing conversations, as the market moves towards even greater relevance and customisation. This is endorsed by the increase seen for Ad personalisation in the global Marketing Priorities 2017 list.

Other Priorities

In 2016, there was a surge in interest in immersive ad formats including VR and Augmented Reality – this was primarily driven by gaming, the accessibility of VR cardboard goggles, and the increasing choice of immersive apps. However, the rate of consumer adoption of VR and other immersive formats has been slower than initially expected. Among global marketers, Rich media ad formats falls from 19% in 2016, to 13% in the 2017 Marketing Priorities list. Virtual reality drops from 17% to 12%, and 360 Ad formats declines from 18% in 2016 to 12% in 2017. Whilst the industry continues to explore solutions to fully exploit and monetise these formats, 71% of global marketers in 2017 still agree that "Virtual reality will drive the next technology revolution".

> "Among brand marketers, viewability and fraudulent traffic was one of the lowest scoring priorities in 2016 (8%), this increased almost threefold to 20% in 2017."



> “Global marketers are now focusing on solutions to engage the blockers, rather than the problem itself.”

Although Ad blocking continues to grow, with an estimated 6 in 10 global consumers now using blockers, its Marketing Priority ranking has dropped from #9 in 2016 (28%), to #16 in 2017 (12%). Ad blocking is clearly here to stay, and global marketers have come to terms with this in 2017 and are now more focused on finding solutions to counter Ad blocking, rather than contemplating the implications. This is being addressed through smarter content strategies, influencer marketing, and more interactive advertising formats that can engage the blockers!

> “Perhaps fake news is an issue that brands should be taking more seriously.”

> “As digital TV grows, the TV advertising landscape will be driven by programmatic buying.”

Whilst nothing new, Fake news has become a major talking point in 2017, primarily being driven by political supporters and social media. It is a new entry in the Marketing Priorities list and ranks #12 among global marketers. Fake news can impact both consumer news choices, as well as brands that seek the right publishers to associate with, and the right environments in which to place their advertising. There is evidence to suggest that news brands associated with Fake news are considered less trusted in the eyes of consumers, and the very subject questions the validity and trustworthiness of content produced by publishers, and news brands in particular. Publishers are now devoting even more time and resources into source checking, and news verification. So, not surprisingly, Fake news is a global top ten marketing consideration for publishers scoring 24%, compared to agencies #12 (19%) and brand marketers #13 (15%). But perhaps this is an issue that brands should be taking more seriously.

Moving onto TV, there is a lot of debate at the moment around the future of TV audiences and advertising dollars. The ‘Changing landscape of original TV’ ranks #13 in the Marketing Priorities list scoring 14% in 2017 and increasing from 11% (#18) in 2016. Not surprisingly, TV publishers are driving interest in this consideration with 25% of TV executives including it in the Marketing Priorities list in 2017 (it also ranked in the TV publisher top ten).

TV has come under the spot light recently as the lines between TV and video continue to blur. Consumers now decide what content and programmes to watch and when to watch. This could be via linear or non-linear TV, VOD, STB’s, Connected TV, or on a mobile device. With all these access choices available, it is becoming increasingly difficult to target consumers in the traditional way (by the programs they consume at a certain time). Whilst video is booming, the future of linear TV and traditional TV spot advertising is in doubt. There are some marketers who believe that linear TV, may not exist in the next 5 years, and the landscape will be dominated by digital, with TV ad placement based on ‘audiences’ using data from publishers and distribution platforms. One thing is certain, there are big changes ahead for TV.

As digital TV grows, the TV advertising landscape will be driven by programmatic buying, similar to programmatic display and video advertising on desktop and mobile. In addition, the continued growth of original content creation by the main tech players such as Amazon, Apple, Google and Facebook will not only change the TV landscape, but also the way in which consumers interact with TV. Whether consumed on a big screen, projected on a wall, or via a mobile device, TV consumption will continue, and the ‘TV box’ (as we know it) will simply become one of many screen experiences of choice.

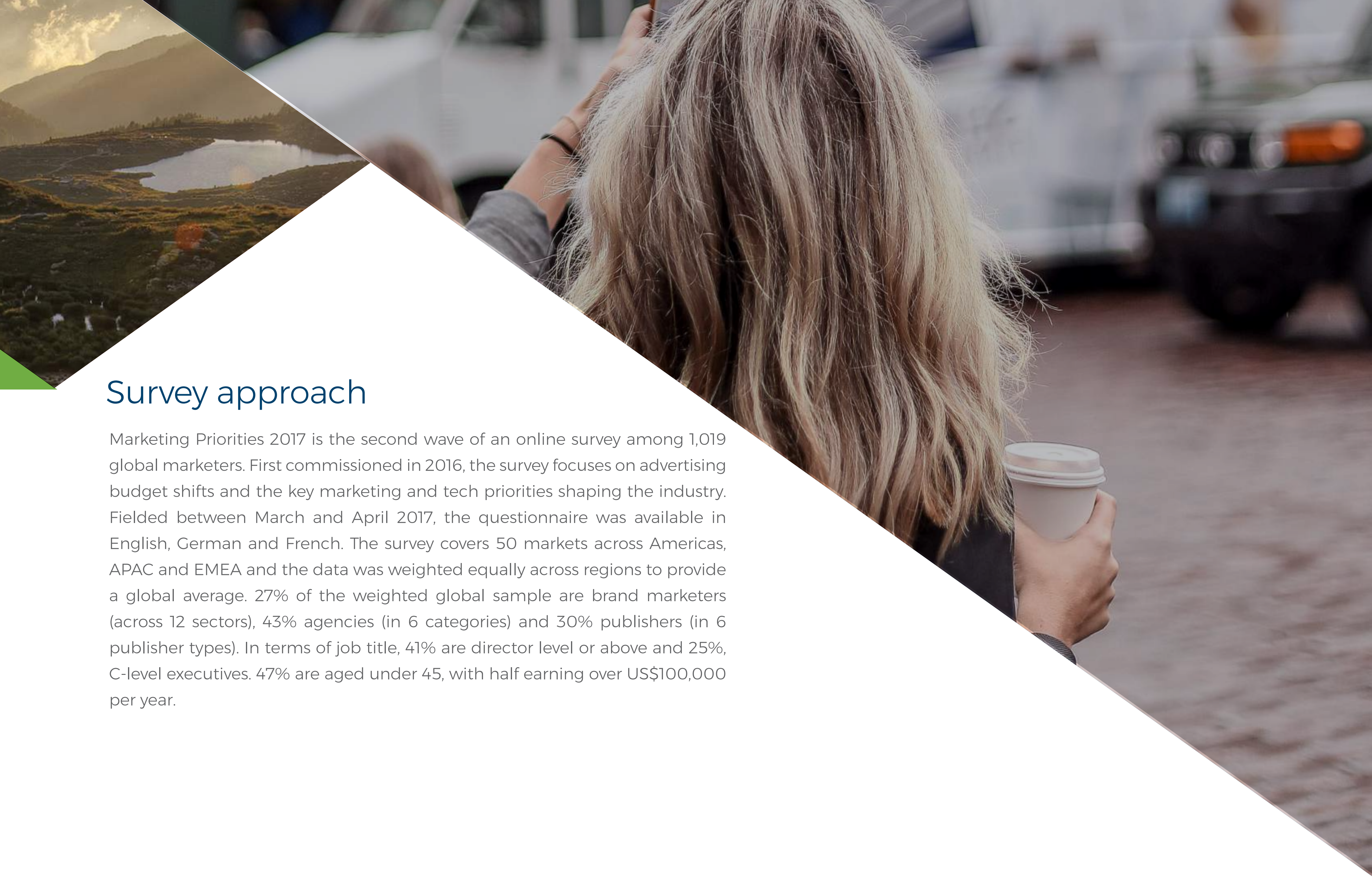
“Content marketing still remains the primary marketing consideration, but its dominance in 2017 has been squeezed with an increased focus on accountability, measurement and personalisation.”

Summary

2017 has already been described as a 'year of change' by some marketers, and Marketing Priorities 2017 reveals a new list of marketing considerations that replace many of last year's burning issues. Ad blocking caused excitement among global marketers in 2016, but this year, the industry has moved on, with global marketers focusing on solutions to engage the blockers, rather than the problem itself. Trust has become more important in 2017. Global marketers are aware of the importance of working with trusted partners in the supply chain, the increased importance of trusted content (in a world surrounded by fake news), and the value of dealing with trusted influencers to engage consumers in a very relevant and personal way.

Artificial intelligence, big data and automation are growing in importance, and are driving many of the Marketing Priorities identified in 2017. Content marketing still remains the primary marketing consideration, but its dominance in 2017 has been squeezed with an increased focus on accountability, measurement and personalisation. The increased interest in ad personalisation among brand marketers in particular, could be an important indication of a renewed interest in 'good, but customised advertising'.

The structure of the TV landscape is changing as consumer behaviour evolves, and the lines between TV and video continue to blur. Mobile, video and social dominate platform and format ad growth, with programmatic driving digital ad purchasing. But as global mobile device usage reaches saturation, other technologies and interfaces will become increasingly prevalent. The potential of VR and augmented reality has yet to be fully exploited, and with advancements in voice tech and the rise of voice interfaces, some of these technologies could be the drivers for immersive-led marketing in a future screenless world.



Survey approach

Marketing Priorities 2017 is the second wave of an online survey among 1,019 global marketers. First commissioned in 2016, the survey focuses on advertising budget shifts and the key marketing and tech priorities shaping the industry. Fielded between March and April 2017, the questionnaire was available in English, German and French. The survey covers 50 markets across Americas, APAC and EMEA and the data was weighted equally across regions to provide a global average. 27% of the weighted global sample are brand marketers (across 12 sectors), 43% agencies (in 6 categories) and 30% publishers (in 6 publisher types). In terms of job title, 41% are director level or above and 25%, C-level executives. 47% are aged under 45, with half earning over US$100,000 per year.

APPENDIX

TOP 15 Global Technology Priorities (2017 by region)

RANK	EMEA	APAC	AMERICAS
1	Power of mobile devices	Power of mobile devices	Power of mobile devices
2	Big data	Social media software	Big data
3	Security and data protection	Mobile app development	Social media software
4	Mobile app development	Big data	Mobile app development
5	Social media software	Internet of Things	Internet of Things
6	Artificial Intelligence	Security and data protection	Cloud technology
7	Internet of Things	M-commerce	Artificial Intelligence
8	Cloud technology	Virtual reality	Virtual reality
9	Voice assistants	Augmented reality	Security and data protection
10	M-commerce	Cloud technology	M-commerce
11	Virtual reality	Artificial Intelligence	Augmented reality
12	Augmented reality	Voice assistants	Voice assistants
13	Wearable technology	3D printing	Wearable technology
14	Robotics	Wearable technology	Drones
15	3D printing	Blockchain	Robotics

TOP 15 Global Technology Priorities (2017 by sector)

RANK	BRANDS	PUBLISHERS	AGENCIES
1	Power of mobile devices	Power of mobile devices	Power of mobile devices
2	Mobile app development	Big data	Big data
3	Big data	Mobile app development	Social media software
4	Social media software	Social media software	Mobile app development
5	Security and data protection	Internet of Things	Security and data protection
6	Internet of Things	Security and data protection	Artificial Intelligence
7	Cloud technology	Virtual reality	M-commerce
8	Artificial Intelligence	Cloud technology	Internet of Things
9	M-commerce	Augmented reality	Voice assistants
10	Virtual reality	Artificial Intelligence	Virtual reality
11	Augmented reality	M-commerce	Augmented reality
12	Voice assistants	Voice assistants	Cloud technology
13	Wearable technology	Wearable technology	Wearable technology
14	Robotics	3D printing	3D printing
15	Drones	Drones	Drones

TOP 15 Global Marketing Priorities (2017 by region)

RANK	EMEA	APAC	AMERICAS
1	Programmatic	Content marketing	ROI and accountability
2	Content marketing	ROI and accountability	Content marketing
3	Ad personalisation	Accurate audience measurement	Accurate audience measurement
4	Accurate audience measurement	Mobile video	Ad personalisation
5	ROI and accountability	Influencer marketing	Programmatic
6	Mobile video	Ad personalisation	Mobile video
7	Content quality	Content quality	Influencer marketing
8	Cross-device targeting	Content relevance	Content quality
9	Content relevance	Programmatic	Viewability and fraudulent traffic
10	Viewability and fraudulent traffic	Cross-device targeting	Content relevance
11	Influencer marketing	Fake news	Cross-device targeting
12	Fake news	Viewability and fraudulent traffic	Fake news
13	Changing TV landscape	Rich media advertising formats	Virtual reality
14	Ad blocking	Changing TV landscape	Changing TV landscape
15	Media supply chain complexity	Ad blocking	Rich media advertising formats

TOP 15 Global Marketing Priorities (2017 by sector)

RANK	BRANDS	PUBLISHERS	AGENCIES
1	ROI and accountability	Content marketing	ROI and accountability
2	Ad personalisation	Accurate audience measurement	Content marketing
3	Accurate audience measurement	Mobile video	Programmatic
4	Content marketing	Programmatic	Accurate audience measurement
5	Content quality	Ad personalisation	Ad personalisation
6	Influencer marketing	Influencer marketing	Mobile video
7	Content relevance	ROI and accountability	Viewability and fraudulent traffic
8	Programmatic	Content quality	Content quality
9	Mobile video	Fake news	Cross-device targeting
10	Cross-device targeting	Cross-device targeting	Influencer marketing
11	Viewability and fraudulent traffic	Content relevance	Content relevance
12	Virtual reality	Viewability and fraudulent traffic	Fake news
13	Fake news	Rich media advertising formats	Changing TV landscape
14	Changing TV landscape	Virtual reality	Rich media advertising formats
15	360 degree ad formats	Changing TV landscape	Ad blocking

Marketing Priorities 2017

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