Advertising State-of-Play Report 2022

Where the advertising industry is headed in the cookieless world and beyond

Asia Pacific Edition

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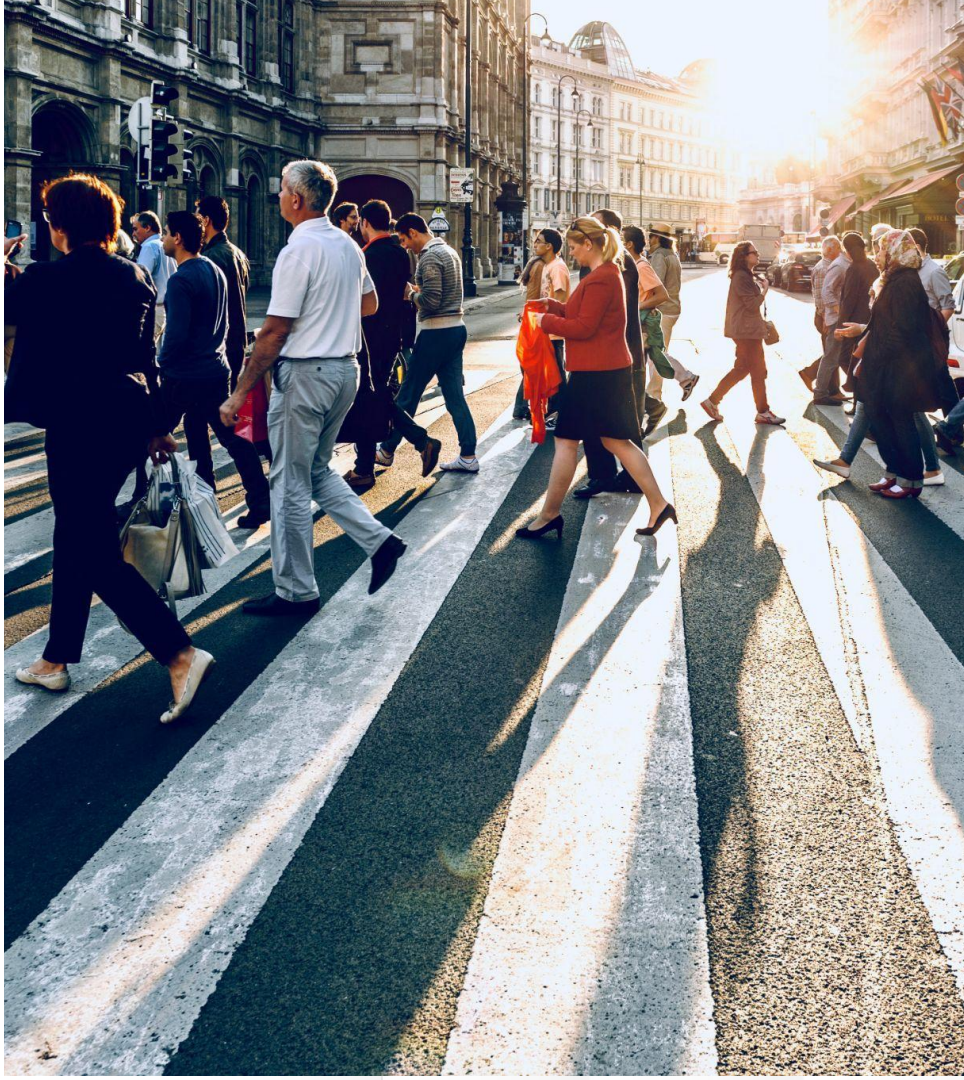


What you'll find in this report

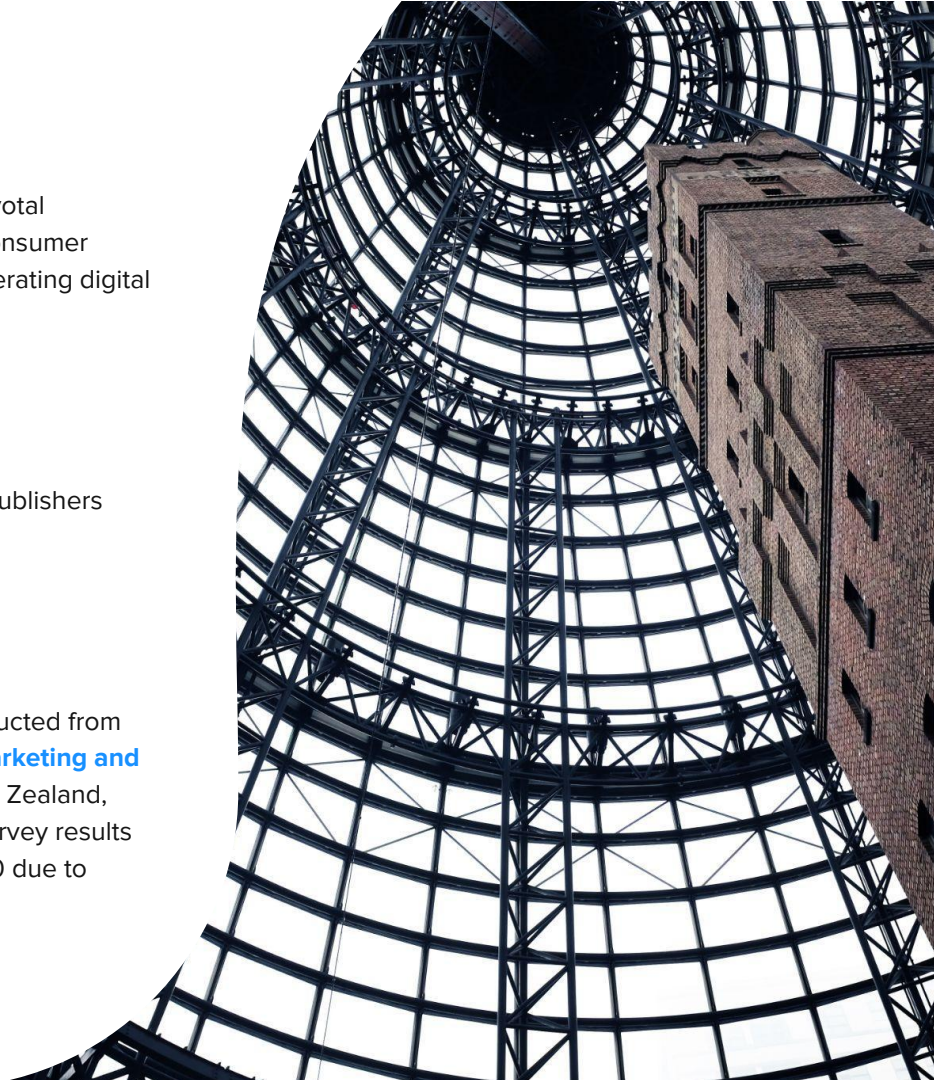
The Asia Pacific (APAC) media industry is currently undergoing its most pivotal transformation yet, with recurring themes such as the cookieless world, consumer privacy, and programmatic shaping how advertising plays out in our accelerating digital future.

This report explores:

- where the future of digital advertising is headed in 2022
- what challenges and opportunities lie ahead for advertisers and publishers
- where advertisers in the region are planning media investments
- what skill gaps need to be filled and more

Data collection

Data in this report is from an online survey of first-party respondents conducted from 10-27 August, 2021. The survey generated responses from almost **600 marketing and advertising professionals** in each of the following markets: Australia, New Zealand, Singapore, China, Hong Kong, India, Indonesia, Malaysia, and Vietnam. Survey results were collected via SurveyMonkey, and data percentages may not total 100 due to rounding.



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Where is advertising headed in 2022 and beyond?

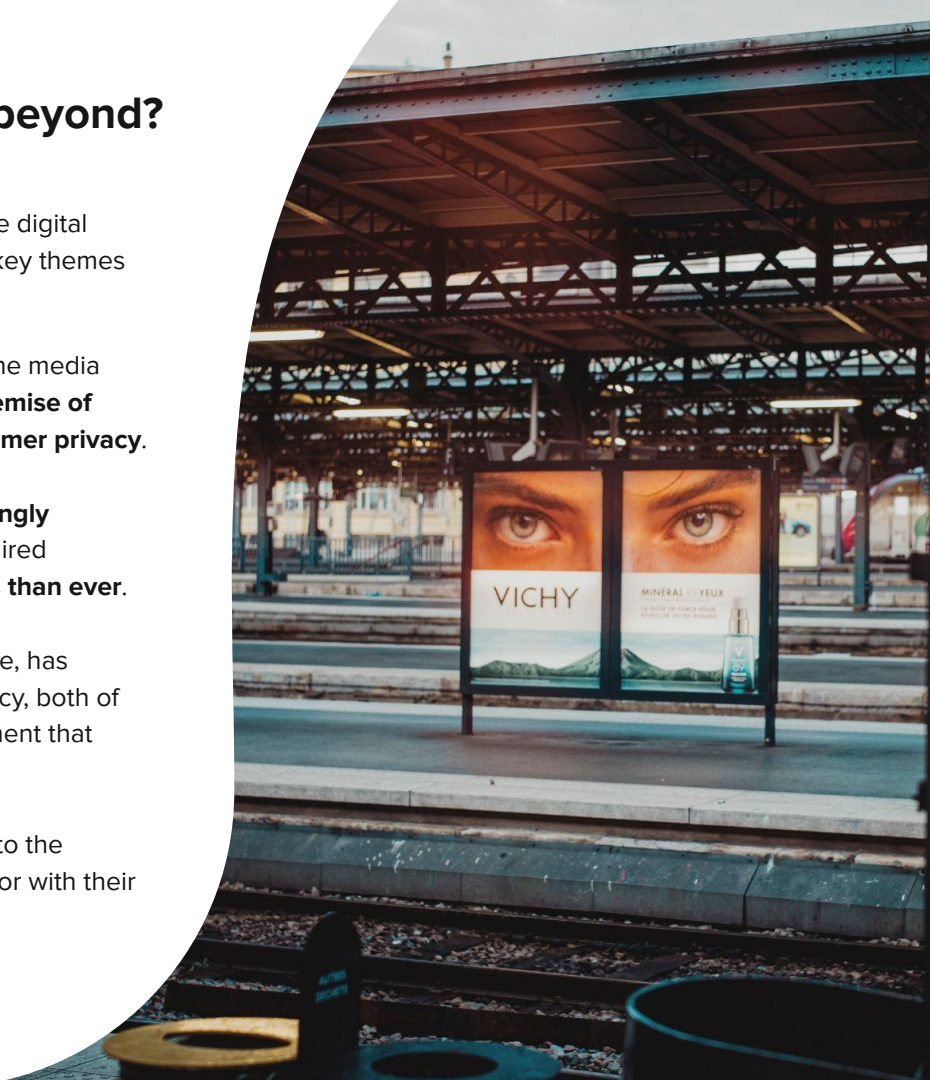
As technology continues to accelerate consumer buying behaviour into the digital realm, the advertising industry has been thrown into a quiet frenzy. A few key themes are defining what the future of advertising looks like:

- **Marketers, Media Agencies, and Publishers** are key partners in the media world and must work to navigate issues such as the **impending demise of third-party cookies** and **evolving global regulation around consumer privacy**.

- Businesses are racing each other to be at the forefront of **increasingly sophisticated ad tech and martech,** along with acquiring the required expertise to participate on **more channels and with more formats than ever**.

- **First-party data**, no longer just a bridge to cross in the far-off future, has become central to the conversation of content quality and relevancy, both of which are keys for any business to succeed in the digital environment that consumers (including us) have helped to shape.

- **Consent** goes hand-in-hand with decisions around investments into the relationships businesses form, whether with a technology partner or with their consumer audiences.



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The Quantcast APAC Advertising Industry Survey 2021

Methodology

The facts and figures in this report were determined through a survey of almost **600 participants from the advertising and marketing profession**, including executive members and decision-makers–from **Agencies (creative, marketing, media alike)**, **Brands, and Publishers** of all sizes, located in **Australia, New Zealand, and South-East Asia.**

Participants were asked to answer a series of questions to help Quantcast better understand their challenges and opportunities in their business and with programmatic advertising, media investments, content preferences, areas to upskill, as well as their opinions and considerations on working with leading ad tech brands.

Because not every respondent has answered all the questions, this report breaks down the respondents' answers against the number of responses submitted for each category–i.e., if there were 50 respondents to one particular question, these 50 form the 100%.

Where multiple responses result in multiple conclusions, an average was taken to determine the final number used.

Respondent Breakdown

The final dataset used for analysis (excluding incomplete or irrelevant responses) are counted below:

ANZ

Brands: 19%
Media Agencies: 59%
Publishers: 22%

ASIA

Brands: 20%
Media Agencies: 39%
Publishers: 41%

Sample questions

- *Has the shift in ad spend to larger companies–i.e., the walled gardens (Google, Facebook, Amazon, etc.)–impacted the quality and/or quantity of content you produce?*
- *What are your top business challenges and priorities that you foresee in the next 12 months?*
- *Over the next 12 months, how do you anticipate you will invest your/your clients' advertising dollars in the following channels?*
- *Which skills or areas would you like to learn about across the next 12 months?*
- *What are your top obstacles/challenges when it comes to programmatic advertising?*

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Australia & New Zealand

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ANZ summary of key findings

	Top challenges expected in 2022	Top opportunities anticipated in 2022	Top areas to upskill in the next 12 months
Marketers	Driving revenue Marketing ROI Ad measurement Consumer change Filling skill gaps	Investing in digital channels Brand-building activity Driving performance Launching new products Team upskilling	Audience insights AI and ML technology Growing first-party data Digital marketing
Agencies	Filling skill gaps Marketing ROI Ad measurement Post-cookie world Consumer change	Deeper audience insights Team upskilling Brand-building activity Growing first-party data Using AI and ML tech	Audience insights AI and ML technology Measurement Growing first-party data Programmatic advertising
Publishers	Measurement Audience insights Team upskilling Growing first-party data Cookieless activation	Deeper audience insights Launching new products Growing first-party data Brand-building activity Investing in digital channels	Audience insights Programmatic advertising Digital marketing Measurement Brand advertising

Overview of marketers and media agencies (aggregated)

Top channels where media spend will increase

Connected TV
Programmatic video
Social
Search
Programmatic display

Top channels where media spend will reduce

Print
Out of home
Radio
TV

Top Challenges with programmatic

Inventory quality
Finding the right person for the job
Data quality
Transparency challenges
Viewability and impression fraud

Top considerations when working with ad tech partners

Campaign performance
Audience insights
First-party data access
Media cost transparency
Performance and brand offering

Overview of marketers, media agencies, and publishers (aggregated)

Trusted sources for industry knowledge

Industry trade (e.g., AdNews)
Meeting with an expert / thought leader
Industry bodies website (e.g., IAB)
Peers
Industry analysts (e.g., Gartner)

Preferred formats for content and education

Case studies
Short-form videos
Webinars
Newsletters
Whitepapers

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Advertising State-of-Play Report 2022

Key takeaways from ANZ

1. Marketers, media agencies, and publishers see **measurement, skills shortages, and marketing in a cookieless world as key challenges**, while **acquiring first-party data, increasing brand building activity, and enhancing skill sets are seen as top opportunity areas** heading into 2022.
2. **Audience insights and changing consumer behaviour**, as well as **AI and machine learning technologies** are **key areas for advertisers to upskill** in across 2022.
3. **Media budgets are on the rise**, with significant investment growth in digital channels such as **programmatic video and connected TV (CTV)**.
4. As the future of advertising moves toward integrated partnerships, advertisers are looking for ad tech providers that can **deliver on campaign performance** and help them **access deeper audience insights** to truly understand their customers.
5. When it comes to programmatic, advertisers are primarily facing challenges with **data quality** and **getting the right expertise on board** to execute their strategies.

Challenges and Opportunities

ANZ

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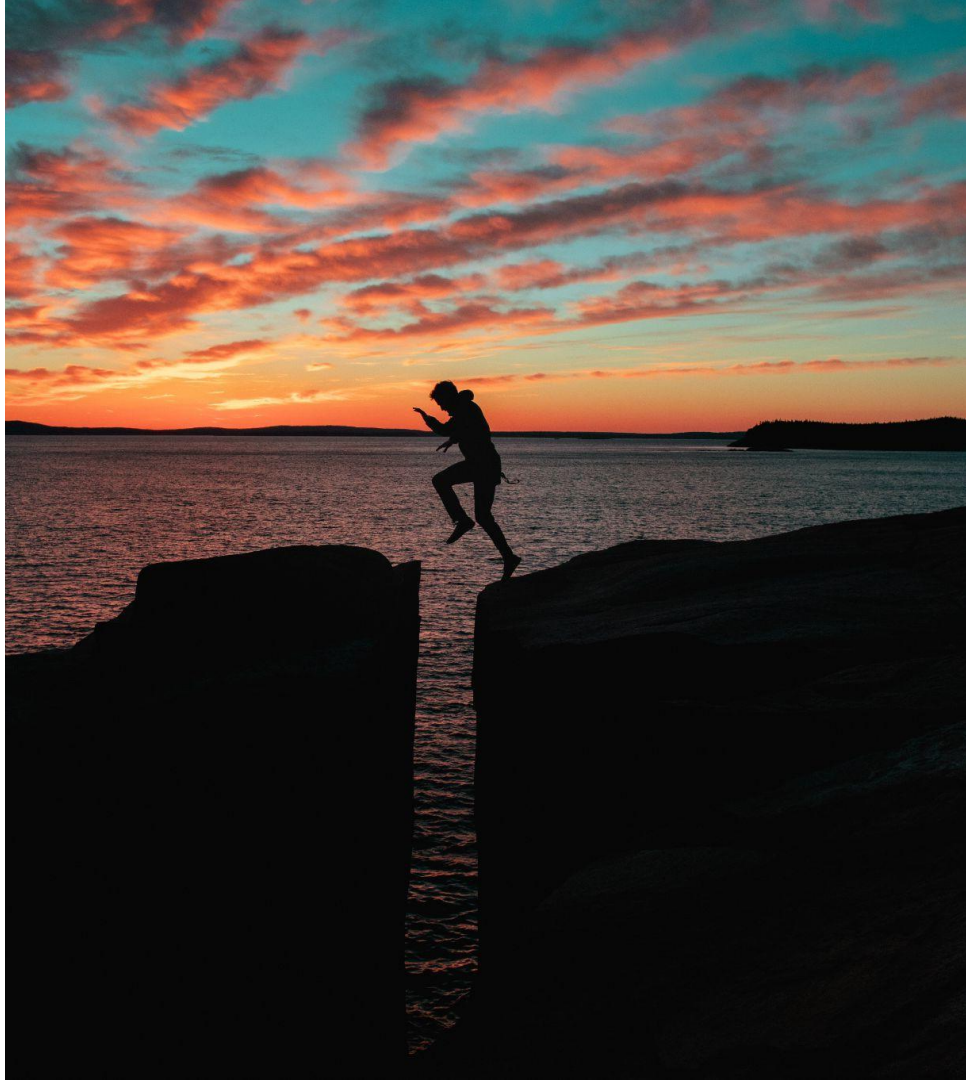

Challenges for the year ahead

Marketers (brands)

With increased pressure to **drive revenue** and the upweighted investment in digital channels, marketers are looking to maximise every ad dollar spent and **demonstrate marketing ROI** within their businesses. Understanding ad performance is a crucial concern for marketers, and is likely due to challenges **around attribution across different channels**.

TOP 5 CHALLENGES

1. Driving revenue
2. Delivering ROI from marketing activities
3. Measuring ad effectiveness
4. Fast-changing consumer behaviour
5. Skills shortages and resourcing

Media Agencies

The impact of COVID-19 has left gaps within media agencies at a time when digital is surging, with many listing '**skill shortages and resourcing**' as a top challenge. Agencies, like marketers, need to **prove their value and deliver ROI for their clients**. This continues to be a challenge due to budget constraints, resource, and measurement challenges.

TOP 5 CHALLENGES

1. Skills shortages and resourcing
2. Delivering ROI from marketing activities
3. Measuring ad effectiveness
4. Demise of third-party cookies
5. Fast-changing consumer behaviour

Publishers

With third-party cookies going away, publishers face the ongoing challenge to better understand their audiences and **measure the impact of their content in a cookieless world**. **Investing in the right people and skills** is key for publishers to support these goals and other priorities, such as **acquiring first-party data for the business to inform advertising**.

TOP 5 CHALLENGES

1. Measurement
2. Audience insights and behavioural change
3. Team education and upskilling
4. Growing first-party data
5. Cookieless targeting, activation and measurement

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Attribution is key in the cookieless world, but there is a lack of know-how

As the media landscape in ANZ continues to take leaps and bounds into digital, what are the roadblocks that lie ahead? Respondents were asked what they foresee as their biggest challenges in 2022, and **three key themes emerged** across marketers, media agencies, and publishers.

Measurement

Measurement is still a big challenge across the board with marketers, media agencies, and publishers. Attribution is becoming more complex as **multiple measures are needed to track success across a plethora of media platforms and channels.**

Skills shortages

Increasing digitisation in the industry, combined with the impact of COVID-19, has resulted in skill shortages and a lack of the right talent. As the industry bounces back in recovery, **marketers, media agencies, and publishers are facing pressure to develop their workforces for a new era in marketing.**

Cookieless world

Media agencies and publishers are facing a pivotal year of change as third-party cookies are sunsetted. The challenge will be for all parties to **build their first-party data strategies and have a plan for ad reach, activation, and measurement in the post-cookie world.**

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Opportunities for the year ahead

Marketers (brands)

Brands that have halted or delayed expansion plans are making **brand awareness** a priority in line with launching new products and services to a recovering market. Marketers are therefore seeing an opportunity to drive revenue through **pairing performance and brand-building activity in 2022**, with **digital channels and platforms leading investment in this area**.

TOP 5 OPPORTUNITIES

1. Investing in digital channels or platforms
2. Investing in brand building activity
3. Investing in performance driving activity
4. Launching new products or service offerings
5. Team education and upskilling

Media Agencies

With an increasing focus on accessing **deeper audience insights**, agencies need access to first-party data–and **the right skill sets**–to better understand their clients' audiences and create more impactful media strategies. Agencies also see investing in **brand-building activity** as a opportunity, with efforts likely to be supported by **AI and machine learning technology**.

TOP 5 OPPORTUNITIES

1. Deeper audience insights
2. Team education and upskilling
3. Investing in brand building activity
4. Growing first-party data
5. Using AI and ML technology

Publishers

Publishers are focusing on getting out to market with **new products and services**, making **deeper audience insights**, **growing first-party data,** and **brand-building activity** a priority. To support these needs, publishers see **investment into digital channels and platforms** as an important opportunity.

TOP 5 OPPORTUNITIES

1. Deeper audience insights
2. Launching new products or service offerings
3. Growing first-party data
4. Investing in brand building activity
5. Investing in digital channels or platforms

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Opportunity lies in going back to the basics and relearning data

As businesses bounce back from the pandemic, what opportunities await advertisers and media owners? Respondents were asked what they foresee as their biggest opportunities in 2022 and narrowed down their answers to **three key themes**.

First-party data

The real work with first-party data begins in 2022, as advertisers and publishers look to expand their access to first-party data and future-proof themselves for the impending cookieless world. Forming **close partnerships with ad tech providers** is core to this area.

Learning and upskilling

With critical skill gaps to fill, advertisers (agency and marketer) are looking to **learn and upskill their teams**. It's a great time to **lean on the experts** and **industry partners** that can help in this training space.

Brand-building

Advertisers (agencies and marketers) see the opportunity that brand will play in the next 12 months as demand upticks. It's crucial for marketers to continue **investing in brand-building activity to stay top-of-mind as consumers look to spend in 2022.**

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Staying ahead in an evolving landscape: areas to upskill in 2022

With consumer shifts over the past 2 years, all audience groups are keen to stay close to their changing customers, with marketers and media agencies looking to **invest in audience insights** over the next 12 months.

Backgrounds in digital marketing, particularly **programmatic skills**, are lacking and are therefore an area of focus for advertisers. With investment increasing in the digital marketing space, marketers and media agencies need to ensure they have the teams and partners in place that have the expertise in these fields.

Given the demise of third-party cookies, advertisers will be looking for partners and solutions that can help them navigate and thrive in this new environment.

What areas would you like to learn more about, or upskill in the next 12 months?

Marketers (brands)

1. Audience insights and behavioural change
2. AI and ML technology
3. Measurement

Media Agencies

1. Audience insights and behavioural change
2. Growing first-party data
3. AI and ML technology

Publishers

1. Audience insights and behavioural change
2. Programmatic advertising
3. Digital marketing/Measurement

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Media Investments in the Year Ahead

ANZ

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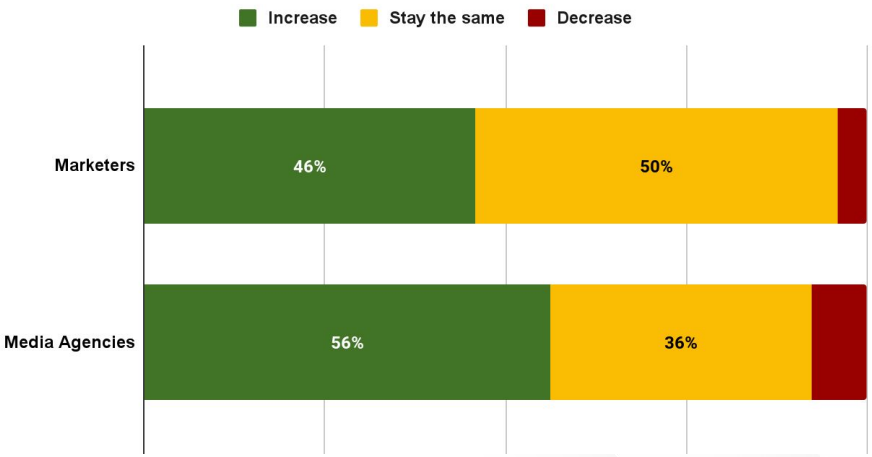
Media budgets are growing to meet a highly digitised market

With increased demand for online retail and services, and the revival of industries impacted by COVID-19–such as travel and hospitality–media investment is set to grow across the region, with over **56% of agencies** and **45% of brands** planning to increase their advertising budgets in 2022.

With digital investment on the up, now is a great time for media agencies and ad tech vendors to showcase their expertise and know-how to help their clients navigate the complexities of the evolving digital advertising ecosystem.

In 2022, do you believe your/your clients' advertising budget will...



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Digital channels continue to lead media investment growth

Correlating with the increasing importance and opportunities around brand advertising, we will see video channels such as **programmatic video** and **connected TV (CTV)** grow significantly.

Search and **social** remain important channels for brands and agencies with their easy-to-use self-service tools. With so many channels to choose from, advertisers building their omnichannel strategies must prioritise delivering a seamless digital experience across all channels.

Respondent Insights

How important is it to be able to advertise on the open internet (e.g., outside of Facebook, Google, Amazon, etc.)?

70% of **marketers** say it is very important *(rated 7 out of 10 or higher)*

68% of **media agencies** say it is very important *(rated 7 out of 10 or higher)*

Top channels where investment will likely increase

Marketers (brands)	
1	Social
2	Search
3	Programmatic video
4	Programmatic display
5	Connected TV

Media Agencies	
1	Connected TV
2	Programmatic video
3	Social
4	Search
5	Programmatic display

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Offline media investment is declining, following a year of digital transformation

The last year saw many brands embark on their digital transformation journey. With more people working from home and increased consumption of digital content, it's no surprise that most marketers and agencies are looking to reduce their offline media spend in 2022.

Print and radio channels are likely to see the largest decrease in spend as advertisers allocate more budget into creating digital experiences to engage with their audiences in meaningful ways.

Top channels where investment will likely reduce

Marketers (brands)

1. Radio
2. Out of home
3. Print
4. Social
5. TV

Media Agencies

1. Radio
2. Print
3. Out of home
4. TV

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Finding the Right Ad Tech Partner: What Do Advertisers Want?

ANZ

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Finding the right ad tech partner: top five must-haves

The future of advertising is moving towards **integrated partnerships and collaboration** (take Unified ID 2.0, for example). Agencies and in-house marketing teams alike will look to partnerships with ad tech providers to fill knowledge and tool gaps, and help guide them through a somewhat uncertain time in the industry.

With goals to drive revenue and more pressure to demonstrate marketing ROI, advertisers see **campaign performance** and **audience insights** as the two most important factors when working with an ad tech partner, followed by **media cost transparency**, the ability to run **brand and performance-led campaigns**, and **first-party data access.**

What are your most important considerations when working with an ad tech partner across the next 12 months?

Across Marketers and Media Agencies	
1	Campaign performance
2	Audience insights
3	Media cost transparency
4	Performance and brand advertising capabilities
5	First-party data access

Quantcast

The path to programmatic success: common challenges

Widely considered a complex tactic, marketers and agencies alike face **challenges with getting the right expertise** to run programmatic strategies in-house and for their clients, with many also citing '**data quality**' as a key challenge. Beyond having the right skills and data, the barriers to entry into programmatic advertising differ for marketers and media agencies:

- **Marketers** are more concerned with the executional aspect of programmatic advertising: reach capabilities and what formats to use.
- **Media agencies** are more concerned with the technical aspects, including inventory quality, transparency issues, and ad fraud.

What are your top challenges when it comes to programmatic advertising?

Marketers (brands)

1. Finding the best person for the job
2. Data quality
3. Reach capabilities
4. Lack of programmatic know-how
5. Creative formats and inventory quality

Media Agencies

1. Inventory quality
2. Finding the best person for the job
3. Data quality
4. Transparency challenges
5. Viewability and impression fraud

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Tips to make programmatic advertising work for your organisation

"I don't have programmatic expertise within my team"

You don't have to go it alone! Teaming up with an expert helps to ensure all aspects of your programmatic strategies–from set up to reach to measurement–are clearly defined and actioned against.
Ad tech partners such as Quantcast can provide the expertise to fill programmatic knowledge gaps within your organisation and help you kick-start your campaigns with minimal worries.

"I don't know if I have the right data"

Leverage partnerships that can provide the first-party data you need to drive accurate results in your programmatic strategies. Quantcast, for example, draws real-time data from over 100 million web and mobile destinations, allowing you to tap into a rich source of unique audience insights to reach those that matter most to your business.

"I'm concerned about inventory quality and ad fraud"

Ad fraud is a key concern for advertisers and can include fraudulent traffic from human (click farms) and non-human (bots, etc.) sources. Working with ad verification providers, creating whitelists, keeping a close eye on your analytics for signs of ad fraud, and carefully vetting the publishers you work with are a few ways to reduce ad fraud.

"Programmatic advertising lacks transparency"

Ad exchanges were created to combat the transparency challenges that faced ad networks of old. Choose a programmatic platform that gives you a clear understanding of any associated costs and any other service that could incur a fee. It's also important to have conversations about the level of transparency you'd like before choosing an ad tech provider you'd like to partner with.

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Asia

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Asia summary of key findings

	Top challenges expected in 2022	Top opportunities anticipated in 2022	Top areas to upskill in the next 12 months
Marketers	Consumer change Driving revenue Growing first-party data Balancing budgets Digital transformation	Brand-building activity Investing in digital channels Exploring international markets Team upskilling Deeper audience insights	Audience insights Digital marketing Brand advertising Growing first-party data Performance advertising
Agencies	Marketing ROI Digital transformation Growing first-party data Ad measurement Cookieless world	Deeper audience insights Investing in digital channels Using AI and ML tech Growing first-party data Omnichannel partnerships	Audience insights AI and ML technology Growing first-party data Digital marketing Privacy and identity
Publishers	Audience insights Measurement Growing first-party data Team upskilling Cookieless activation	Driving performance Launching new products Using AI and ML tech Deeper audience insights Exploring international markets	Audience insights Digital marketing Growing first-party data Measurement Brand advertising

Overview of marketers and media agencies (aggregated)

Top channels where media spend will increase

Programmatic Video
Social
Programmatic Display
Search
Connected TV

Top channels where media spend will reduce

Radio
Print
TV
Out of home

Top Challenges with Programmatic

Reach capabilities
Inventory quality
Data quality
Viewability and impression fraud
Brand safety

Top considerations when working with ad tech partners

Campaign performance
Brand and performance offering
Audience insights
First-party data access
Omnichannel capabilities

Overview of marketers, media agencies, and publishers (aggregated)

Trusted sources for industry knowledge

Industry trade (e.g., The Drum)
Industry analysts (e.g., Gartner)
Meeting with an expert / thought leader
Industry bodies website (e.g., IAB)
Social media

Preferred formats for content and education

Case studies
Short-form videos
Newsletters
Whitepapers
Webinars

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Advertising State-of-Play Report 2022

Key takeaways from Asia

1. Marketers, media agencies, and publishers see **consumer behavioural change, driving revenue,** and the **digital transformation** within their businesses as key challenges. These digital shifts, however, are creating opportunities for advertisers to **build brand and fill skill gaps** in 2022.

2. Media investment is slated to **rise rapidly** in the next 12 months, with advertisers in Asia anticipating **China, India, and Singapore as top markets for growth.** Channels such as **social and programmatic video will also see a significant increase in investment** as advertisers move away from offline formats such as print and TV.

3. **Growing first-party data**, **understanding changing consumer behaviour,** and **leveraging AI and ML technology** are key areas advertisers and publishers want to upskill in across 2022.

4. As the future of advertising moves toward integrated partnerships, advertisers are looking for ad tech providers that can **deliver great results on campaigns that combine** both **brand and performance-led goals**.

5. Concerns about **reach capabilities** and **inventory quality** are holding advertisers back from fully exploring the potential of programmatic advertising.

Challenges and Opportunities

Asia

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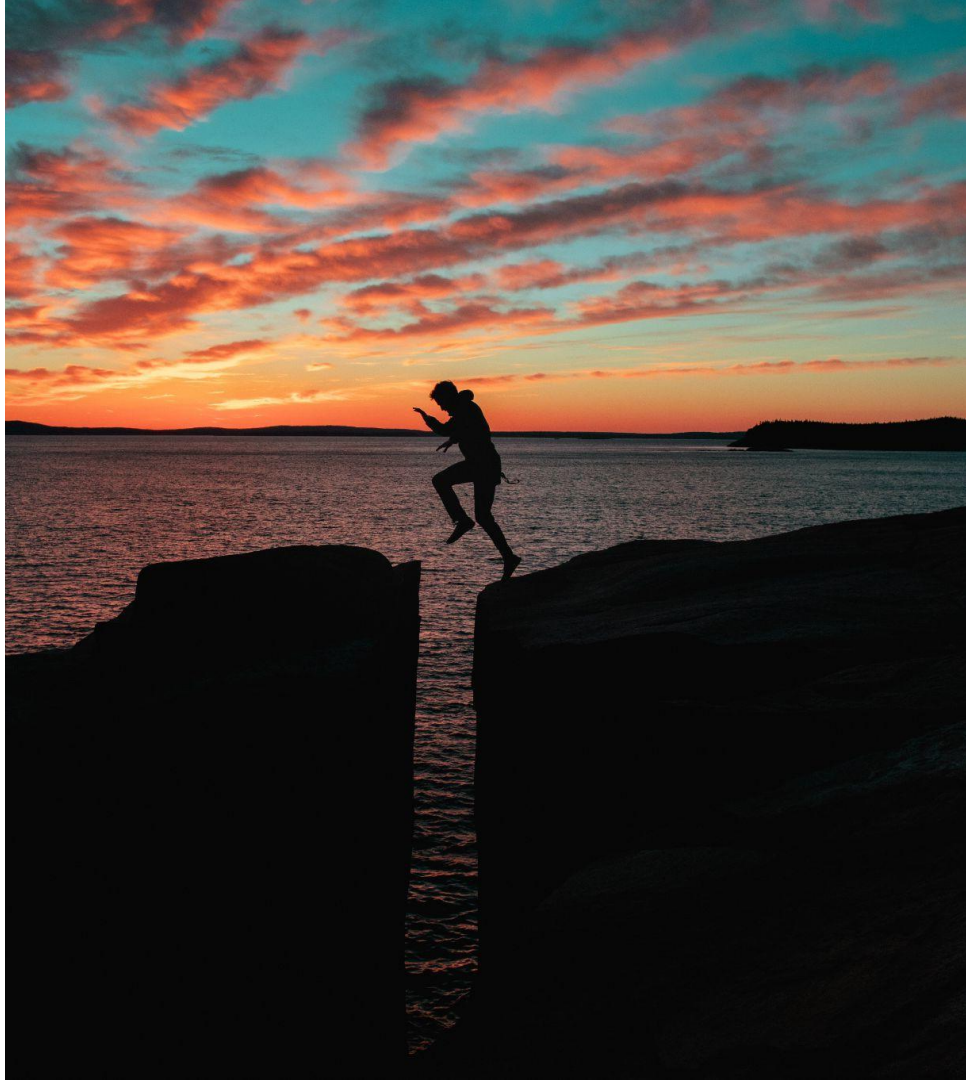

Challenges for the year ahead

Marketers (brands)

With digital activity shifting online, marketing is now tied closely to **understanding changing consumer behaviour** and using that knowledge to **drive revenue**. **Growing first-party data is a priority** for marketers to address, along with **balancing media budget between performance and brand-led goals.** Marketers are also expecting to pivot their strategies in line with **digital transformation** initiatives planned for 2022.

TOP 5 CHALLENGES

1. Fast-changing consumer behaviour
2. Driving revenue
3. Growing first-party data
4. Balancing budgets with brand and performance
5. Digital transformation

Media Agencies

Media agencies are facing growing pressures to **demonstrate ROI from marketing activity** and better measure campaign success. **Digital transformation** is also expected to be a challenge as agencies innovate to stay ahead of their clients' shifting expectations. Addressing these challenges **requires access to a reliable source of first-party data** and an **attribution strategy** that can influence marketing decision-making.

TOP 5 CHALLENGES

1. Delivering ROI from marketing activity
2. Digital transformation
3. Growing first-party data
4. Measuring ad effectiveness
5. Demise of third-party cookies

Publishers

With third-party cookies going away, publishers face the ongoing challenge to better **understand their audiences** and **measure the impact of their content in a cookieless world**. **Growing their stack of first-party data and investing in the right people and skills** is key for publishers to support these goals and other priorities, particularly as the media industry moves towards a cookieless future.

TOP 5 CHALLENGES

1. Audience insights
2. Measurement
3. Growing first-party data
4. Team education and upskilling
5. Cookieless targeting, activation and measurement

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Consumer behavioural change is shifting business strategies

Asia is widely considered as a key growth market[1] for many industries. As a new recovery period sees the media industry take leaps and bounds into digital, what are the roadblocks that lie ahead? Respondents were asked what they foresee as their biggest challenges in 2022, and **three key themes emerged** across marketers, media agencies, and publishers.

Consumer change

As consumer buying behaviour shifts online, advertisers need to better understand their audiences and meet their needs with relevant messaging. Core to this is **deriving deeper audience insights**, informed by **first-party data**, and **measuring ad effectiveness** in a post-cookie future.

Driving revenue

As brands recover from a pandemic-driven standstill, marketers are challenged to **drive revenue** for their businesses, and media agencies are therefore facing increased scrutiny to **demonstrate marketing ROI from media investments**.

Digital transformation

Businesses are going through a transformative period in media. In a Web 3.0 world, **digitalisation will influence hiring and resourcing** within organisations as brands, agencies, and publishers look to **fill critical skill gaps** in order to innovate their ad strategies and stay ahead of the competition.

Source

1. Australian Department of Foreign Affairs and Trade, ASEAN Market Insights 2021

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Opportunities for the year ahead

Marketers (brands)

Brands that have halted or delayed expansion plans with COVID-19 are making **brand awareness** a priority along with a focus on **digital channels and platforms** in 2022. Marketers are looking to upskill their teams and get closer to their customers, making **deeper audience insights** and **acquiring first-party data** other key opportunities for growth.

TOP 5 OPPORTUNITIES

1. Investing in brand building activity
2. Investing in digital channels or platforms
3. Exploring international markets
4. Team education and upskilling
5. Deeper audience insights

Media Agencies

With an increasing focus on exploring **deeper audience insights**, **digital channels,** and **AI and ML technology**, agencies need access to first-party data and the right partnerships to better create more impactful media strategies across **omnichannel formats**.

TOP 5 OPPORTUNITIES

1. Deeper audience insights
2. Investing in digital channels or platforms
3. Using AI and ML technology
4. Growing first-party data
5. Transitioning to omnichannel partnerships

Publishers

Publishers are focusing on getting out to market with **new products and services**, making **deeper audience insights**, **growing first-party data**, and **brand-building activity** a priority. Publishers also see **building consumer trust** as an area of opportunity, as **evolving privacy regulations** continue to shift how consumers browse content on the web.

TOP 5 OPPORTUNITIES

1. Investing in performance driving activity
2. Launching new products or service offerings
3. Using AI and ML technology
4. Deeper audience insights
5. Exploring international markets

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Digital shifts are creating opportunities to build brand and fill skill gaps

As businesses bounce back from the pandemic, what opportunities await advertisers and media owners? Respondents were asked what they foresee as their biggest opportunities in 2022 and narrowed down their answers to **three key themes**.

Building brand

Advertisers and publishers are looking to **improve their product or service offerings**, potentially **expanding into new markets** over the next 12 months as the demand upticks. It's crucial for marketers to continue **investing in brand building activity to stay top-of-mind as consumers look to spend more in 2022.**

Investing in digital

Digital advertising is the way forward, with advertisers prepared to **invest in digital channels and platforms**, and leveraging **AI and ML technology to derive deeper audience insights** in 2022. Partnering with the right ad tech providers is key to helping achieve these goals.

Learning and upskilling

With the increasing dominance of digital, advertisers and publishers alike see the opportunity to **learn and upskill their teams to fill key knowledge gaps**. It's a great time to **lean on the experts** and **industry partners** that can help in this training space.

Staying ahead in an evolving landscape: areas to upskill in 2022

With consumer shifts over the past two years, all audience groups are keen to stay close to their changing customers, with marketers and media agencies looking to **invest in audience insights and growing first-party data** over the next 12 months.

Growing first-party data is also a focus for media agencies, with advertisers (marketers and agencies) also looking to upskill themselves in **AI and ML technologies** that can help achieve their businesses' growth goals.

Which areas would you like to learn more about or upskill in the next 12 months?

Marketers (brands)

1. Audience insights and behavioural change
2. AI and ML technology
3. Brand and performance-led advertising

Media Agencies

1. Audience insights and behavioural change
2. Growing first-party data
3. AI and ML technology

Publishers

1. Audience insights and behavioural change
2. Digital marketing
3. Growing first-party data

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Media Investments in the Year Ahead

Asia

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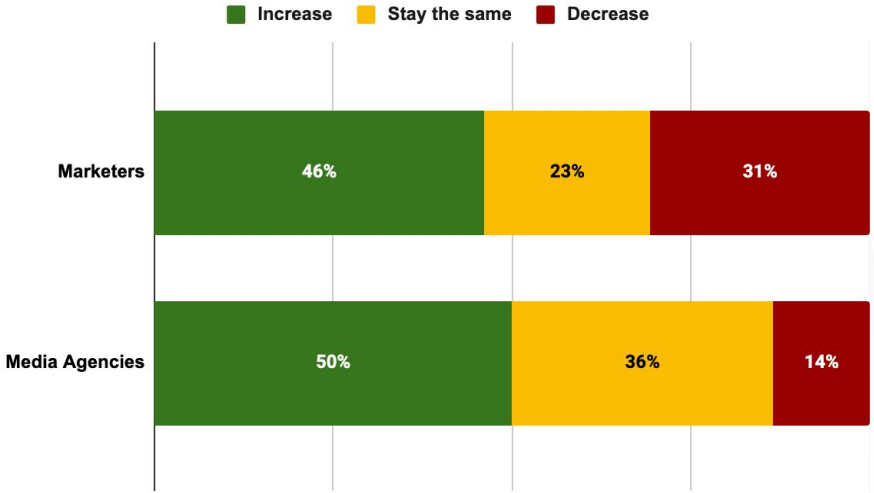
Media budgets are growing to meet a highly digitised market

With increasing demand for online retail and services, budgets are growing accordingly in that region, with **46% of marketers and 50% of media agencies** planning to increase their advertising budgets in 2022.

Approximately **30% of marketers expect their advertising budgets to decrease**, however. For agencies, this reduction feeds opportunities to add value by helping marketers do more with less, and find innovative ways to increase advertising results more cost-effectively.

In 2022, do you believe your/your clients' advertising budget will...



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Digital channels continue to lead media investment growth

Correlating with the increasing importance and opportunities around brand advertising, we will see video channels such as **programmatic display and programmatic video** grow significantly.

Social and **search** remain important channels for brands and agencies, particularly in Asia with its high mobile phone penetration and digital consumption rates. Companies building their omnichannel strategies must prioritise delivering a seamless digital experiences across their brands.

Respondent Insights

How important is it to be able to advertise on the open internet (e.g., outside of Facebook, Google, Amazon, etc.)?

78% of **marketers** say it is very important *(rated 7 out of 10 or higher)*

85% of **media agencies** say it is very important *(rated 7 out of 10 or higher)*

Top channels where investment will likely increase

Marketers (Brands)

1. Social
2. Programmatic video
3. Programmatic display
4. Search

Media Agencies

1. Programmatic video
2. Programmatic display
3. Social
4. Search
5. Connected TV

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Growth regions within Asia's multicultural pool

Ad spend is on the rise and is slated to reach $243.6 billion in Asia-Pacific, growing at a rate of 6.3% by 2022.[1]

Asian marketers specifically lead this growth, with most marketers and media agencies in the region citing **China, India, and Singapore** as key growth markets for advertising, followed by Indonesia and the Philippines.

Did you know?

*Government spending remains a key growth area in Asia, with spending going toward vaccine rollouts and other COVID-19 related initiatives. In APAC's key markets, the travel and transport sectors will still be affected by the uncertainty of the past year. According to forecasts by dentsu[1], the **travel and transport sectors** in APAC's key markets will increase conservatively by **4.9%**, while the **media and entertainment sector** is forecast to grow by **9.7%**.*

Which markets do you anticipate will see the largest advertising budget growth over the next 12 months?

Across Marketers and Media Agencies
1. China
2. India
3. Singapore
4. Indonesia
5. Philippines

Source

1. Dentsu Global Ad Spend Forecast, June 2021

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Offline media investment is declining, following a year of digital transformation

Following a year of digital transformation amongst brands, more people working from home, and the rise of channels such as **connected TV (CTV)** and **digital-out-of-home (DOOH)**, it's no surprise that most marketers and agencies are planning to decrease their offline media spend in 2022.

Print, radio, and TV channels are likely to see the largest decrease in spend as advertisers allocate more budget into creating digital experiences to engage with their audiences in meaningful ways.

Top channels where investment will likely reduce

Marketers (brands)

1. Print
2. TV
3. Connected TV
4. Radio
5. Search

Media Agencies

1. Radio
2. Print
3. TV
4. Out of home

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Finding the Right Ad Tech Partner: What Do Advertisers Want?

Asia

Quantcast

Finding the right ad tech partner: top five must-haves

The future of advertising is moving towards **integrated partnerships and collaboration** (take Unified ID 2.0, for example). Agencies and in-house marketing teams alike will look to partnerships with ad tech providers to fill knowledge and tool gaps, and help guide them through a somewhat uncertain time in the industry.

With goals to drive revenue and more pressure to demonstrate marketing ROI, advertisers want ad tech partners that can **produce great results from performance and brand advertising efforts.**

Advertisers are also looking to partner with ad tech providers that can offer **first-party data access**, **media cost transparency**, and **audience insights.**

What are your most important considerations when working with an ad tech partner across the next 12 months?

Across Marketers and Media Agencies	
1	Performance and brand advertising capabilities
2	Campaign performance
3	First-party data access
4	Media cost transparency
5	Audience insights

Quantcast

The path to programmatic success: common challenges

Widely considered a complex tactic, marketers and agencies alike perceive **'reach capabilities'** as a top challenge with programmatic advertising.

Beyond the ability to reach the right audiences, **marketers** in Asia are **looking for the right expertise to run programmatic in-house**, but are also concerned about **brand safety**, as well as **evolving privacy regulations** and **inventory quality**.

Media agencies in the region are concerned with **data and inventory quality**, which affects **viewability fraud**, along with choosing the right creative formats to produce the best outcomes in their campaigns.

What are your top challenges when it comes to programmatic advertising?

Marketers (Brands)

1. Reach capabilities
2. Finding the best person for the job
3. Brand safety
4. Evolving privacy regulations
5. Inventory quality

Media Agencies

1. Reach capabilities
2. Inventory quality
3. Data quality
4. Viewability and impression fraud
5. Creative formats for programmatic advertising

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Tips to make programmatic advertising work for your organisation

"I don't have programmatic expertise within my team"

You don't have to go it alone! Teaming up with an expert helps to ensure all aspects of your programmatic strategies–from set up to reach to measurement–are clearly defined and actioned against.
Ad tech partners such as Quantcast can provide the expertise to fill programmatic knowledge gaps within your organisation and help you kick-start your campaigns with minimal worries.

"I don't know if I have the right data"

Leverage partnerships that can provide the first-party data you need to drive accurate results in your programmatic strategies. Quantcast, for example, draws real-time data from over 100 million web and mobile destinations, allowing you to tap into a rich source of unique audience insights to reach those that matter most to your business.

"I'm concerned about inventory quality and ad fraud"

Ad fraud is a key concern for advertisers and can include fraudulent traffic from human (click farms) and non-human (bots, etc.) sources. Working with ad verification providers, creating whitelists, keeping a close eye on your analytics for signs of ad fraud, and carefully vetting the publishers you work with are a few ways to reduce ad fraud.

"I'm concerned with evolving privacy laws"

Working with an ad tech partner that has a deep understanding of–and the right solutions for–the industry's changing privacy regulations is key to understanding how you can drive results with your advertising without breaking the rules. The goal here is to balance privacy requirements with customer expectations around not only data collection, but the personalised communications they now expect.

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Our Asia Pacific offices

Quantcast is a global advertising technology company headquartered in San Francisco with 650 people working globally in 20 offices across 10 different countries.

We empower our customers to know and grow their audiences to do better advertising on the open internet with an innovative intelligent audience platform.

Want to learn more?

Explore the future of advertising with us at quantcast.com

Check out other resources to help you navigate the marketer's new reality