

Alliance of Independent Agencies

FUTURE OF DIGITAL FOR AGENCIES

Objectives to Implementation

Tiffany St James

I'm a digital strategist working with large national businesses, global organisations and governments to augment digital capability. I've been recognised as one of the Top 25 women to have changed British Digital Industry over the last 25 years.

I've run my own Management Consultancies for 18 years and am the Former Head of Social Media for the UK Government across 22 Government Departments, running Digital Transformation programmes for a decade within the UK Government from no email to open data.

I'm the digital and social media business partner to Westco Communications, undertaking digital audits, strategy, training, agile working, supporting campaigns and supporting crisis comms.







Alliance of Independent Agencies

Agenda

09:30 ARRIVAL Tea and Coffee

- Global Mega Trends and Global Challenges
- Digital trends for Agencies

11:00 to 11:15 BREAK

- Agency Trends
- How Agencies need to evolve

12:45 to 13:45 LUNCH

- Digital Services
- Emerging Services

15:00 – 15:15 BREAK

• Future Agency



Global Mega Trends



What do we mean by a Global Mega Trend?

What are the Key Characteristics of Global Megatrends?

1. Long-term Impact: They span decades and are not limited to short-term disruptions.

2. Global Influence: They affect multiple countries and regions, transcending borders.

3. Multi-dimensional: They cut across industries, disciplines, and societal dimensions.

4. Transformative: They have the potential to reshape norms, systems, and ways of living.

5. Complex Interactions: They often interconnect, amplifying or influencing one another.



What are the Global Megatrends?

- Consider individually, write down your top 1, 2 or 3
- Share with your table
- Pick your top 3 as a table
- There are no wrong answers.



Four Global Megatrends

- Ageing
- Digitisation
- Decarbonisation
- Social Transformation

STEALING FROM THE FUTURE



(AND HOW YOU (AN STOP IT) By Neil (rofts and Mark Thompson



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Examples of mega trends

- **1. Climate Change and Sustainability**: The growing impact of environmental changes, resource scarcity, and the transition to sustainable practices.
- **2. Technological Innovation**: Rapid advancements in AI, robotics, and digital transformation reshaping economies and industries.
- **3. Cultural and Social Changes**: Evolving societal values, diversity, and the rise of individual empowerment.
- **4. Demographic Shifts**: Changes in population dynamics, such as aging populations, urbanisation, and migration.
- **5. Economic Power Shifts**: The rise of emerging markets and the redistribution of economic influence globally.
- **6. Geopolitical Dynamics**: Shifts in global power structures and the impact of international relations.
- 7. Health and Well-being: The increasing focus on mental health, longevity, and global health challenges like pandemics.



Global Challenges



Future Digital Trends For Agencies



Now think about digital trends that affect agencies

- Consider individually, write down your top 1, 2, 3
- Share with your table
- Pick your top 3 as a table
- There are no wrong answers.



WHAT DID WE LOOK AT?



00. Look BackLook Forward.pdf 🚓	BDO_Tech-Predictions-2024.pdf	DCDX_Gen Z Top 25 Most Magnetic Brands 2023.pdf 🚓
01. 2024 - StartHere.pdf 🚢	BITCOIN SUISSE_CryptoOutlook2024.pdf	DELIVEROO_snack-to-the-future.pdf
02. 2024 - TrendLinks.pdf 🎿	BLACKROCK_BII-Global-Outlook-2024.pdf	DELOITTE INSIGHTS_Global-Human-Capital-Trends-2024.pdf
2B AHEAD_Strategic Foresight 2035.pdf 🚢	BOF_MCKINSEY_The-state-of-fashion-2024.pdf 🚢	DELOITTE_2024 Global Automotive Consumer Study.pdf 🚢
03_Trend x GPT_Presentation Sessions Slides.pdf	BOMPAS_PARR_Future of Food Drink 24.pdf 🚢	DELOITTE_Future of Health 2024.pdf
04_Session_1_Bardmp4 🕰	BOMPAS&PARR_FutureOfFood24.pdf	💴 DELOITTE_Tech-trends-2024.pdf 🚢
05_Session_2_GPTmp4 🚢	BOMPAS&PARR_Thefutureofp-leisurereport_2024.pdf	DENTSU_Creative_Trends_2024.pdf
11FS PULSE_Report-2024.pdf	BOOKING_TravelPredictions2024.pdf	DENTSU-The_Pace_of_Progress_2024_Media_Trends.pdf
ACCENTURE_Banking-Top-10-Trends-2024.pdf	BORN SOCIAL_2024 Trend Report.pdf	💴 DEPOP_2024.pdf 🏔
ACCENTURE_Life-Trends-2024.pdf	CANVAS8_Best_of_Insights_2023.pdf	💴 DEPOSITPHOTOS_Design Trends 2024.pdf 🚢
ACCENTURE_Pulse-of-Change-2024-Index.pdf	CAPGEMINI_Consumer Trends 2024.pdf	🚥 DEPT®_Trends-2024.pdf 🕰
ACCENTURE_Technology Vision 2024.pdf	CAPGEMINI_TechnoVision 2024.pdf	DETERM - PR Trends and Challenges in 2024.pdf
ACCOR_Meeting_Expectations_Report_2024.pdf	📨 CASA FRIJAN - Report De Macrotendencias 2024 PT.pdf 🚢	DFF_Navigating Megatrends-2024.pdf
ACTIVATE_Technology-and-Media-Outlook-2024.pdf	📨 CASSANDRA_Glossary-2023.pdf 🚉	DIAGEO_Distilled_a_Diageo_Foresight_Report_2023.pdf Lag
ACXIOM_CX_Predictions_2024.pdf	CB-INSIGHTS_Tech-Trends-2024.pdf	729 DIELINE 2024 Trend Report SM.pdf
ADM_2024-global-consumer-trends.pdf	CES_Tech Trends To Watch 2024.pdf	DOMO_DataNeverSleeps 2023.png
ADOBE_2023_CreativeTrendsGuide_uk_reduced.pdf	CHANNEL SIGHT_eCommerce Insights 2023 - 2024.pdf	📨 EBIQUITY_Predictions 2024 Media Trends.pdf 🚢
ADWEEK_BRANDED2023_12_en_report_frontify-adweek-creativity.pdf 🕰	COINBASE_2024 Crypto Market Outlook.pdf	ECONSULTANCY_Consumer_Trends_Index_2023_Final.pdf
ALIX PARTNERS_Media & Entertainment Industry 2024.pdf	COLIN LEWIS_The Seven Challenges for Retail Media in 2024.pdf	EDELMAN_Trust Barometer Global Report_2024.pdf 🚢
ALLIANZ_GlobalEconomicOutlook.pdf	CONTAGIOUS_Most Contagious Report 2023.pdf	💴 EIU_General-overview-report-2024.pdf 🚢
MEX_2024-Global-Meetings-and-Events-Forecast.pdf	CONTAGIOUS_Radar 2024.pdf 🚉	💴 EIU_Risk-outlook-2024.pdf 🕰
ARTLIST_Trend+Report+2024.pdf	CONVERA - Economy Trends 2024.pdf 🎎	ELEGENTRESORTS_LuxuryHorizons_2024.pdf
AWS_TRENDHUNTER_5-Tech-Trends-That-Marketers-Need-To-Know-In-2024.pdf	CORRS_M&A 2024 Outlook.pdf	EMARKETER_Advertising Trends to Watch in 2024.pdf
BACARDI_Cocktail-Trends-Report-2024.pdf 🕰	CREATOR IQ_2024 Influencer Marketing Trends.pdf	📨 EPA_AutomotiveTrendsReport.pdf 🎿
BANCO SANTANDER - Informe de Mercado 2024 ES.pdf 🚉	CUKER_Digital_Trends_Report_2023-2024.pdf	EPRS_Ten Issues to Watch-2024.pdf 🚢
BANK OF AMERICA_Online Media Year Ahead 2024.pdf 📩	DAD_Annual_Trend_Report_2023.pdf	ESFERA - Risk in Focus, Ciberseguridad 2024 ES.pdf 🚢
BARCLAYS_Outlook_2024.pdf	DATA AXLE_Predicting 2024.pdf	EXPEDIA_Unpack-24_TrendReport.pdf
BARRY CALLEBAUT - Top Chocolate Trends 2024.pdf 🎿	DATAAI_State of Mobile 2024.pdf	EY_2024-Geostrategic Outlook.pdf
BBC_RD-Projections-foresight-report.pdf	DCDX_Gen Z Screen Time Report 2023.pdf 🔐	📨 EY_2024-global-insurance-outlook.pdf 🚓



INSIDER_HealthTrends2024.pdf	📴 LLYC_Forecast_Healthcare_2024.pdf 🚢	OMG APAC_Trends Report 2024.pdf 🚓
MITERBRAND_Bestglobalbrands23.pdf	M&G INVESTMENT_Peak views what lies ahead in 2024.pdf	MG FUTURES_Closer to the Edge.pdf 🎿
MITERNATIONAL ENERGY AGENCY_Renewables Forecast to 2028.pdf	MARIAN SALZMAN_Trends for 2024_ON-HOPES-EDGE.pdf	ONEBITE_B2B-marketing-trends-2024.pdf 🕰
INTERNATIONAL LABOUR ORGANIZATION_World Employment and Social Outlook 2024.pdf	MARKETSCALE_B2B Content Strategy Trends 2024.pdf 🎿	OUTLIER_Fuelling the Future 24.pdf 🚓
IPSOS x WSGN_Report for mobile phone_trends and insights 2023.pdf L	MCCANN_Influencer Trends Wrapped 2023.pdf 🚢	PINTEREST_Predicts_Report_PDF_2024_ENGB.pdf
PSOS_Flair Collection Brasil 2024(PT).pdf 🚢	MEDIALINK_MarketersForecast2024.pdf	PROPHET_RRB-2023-Report.pdf 🚉
IPSOS_Global_Advisor_Predictions_2024.pdf	MERCER_Economic-and-market-outlook-2024.pdf	PROWLY_PR Trends 2024.pdf
IPSOS_What-The-Future-Cities.pdf Action	MESSARI_Crypto-theses-for-2024.pdf 🚓	PUBLICIS COMMERCE_2023 Review & 2024 Trends.pdf
IPSOS_What-The-Future-Conflict.pdf A	MICHAEL HEALY-REHN_Ontological Shocks-2024 in Trends.pdf 🚢	PUBLICIS MEDIA_FutureFwd2024.pdf
IPSOS_What-The-Future-Intelligence.pdf +	MICROSOFT_NewFutureOfWork_Report2023.pdf	PUBLICISSAPIENT_Retail_Guide_to_Next_2024.pdf
1PSOS-Global-Trends-Polarisation-Pessimism-and-Positivity.pdf	MINDBODY-CLASSPASS_2024-Predictions-Report.pdf	PWC - Emerging Trends in Real Estate 2024 (US & Canada).pdf 🚉
JUAN ISAZA_DDB LATINA_Tendencias2024_ES.pdf 🕰	MINDSHARE_Trends 2024.pdf	PWC - Entertainment and Media Outlook 2023-2027 ES.pdf 🚢
UUAN ISAZA_DDB LATINA_Trends2024.pdf	MINTEL_2024_Global_Consumer_Trends_English.pdf	MC_Emerging Trends In Real State APAC 2024.pdf
JULIUS BAR_SecularOutlook 2024.pdf	MINTEL_2024_Global_Food_and_Drink_Trends_English.pdf	PWC_Emerging-trends-in-real-estate-Europe-2024.pdf 🚢
JUNIPER_Top-10-Fintech-Payments-Trends-2024.pdf	MINTEL_Global_Beauty_and_Personal_Care_Trends-2024.pdf	🔤 PWC_Global Digital Trust Insights 2024.pdf 🚉
JUNIPER_Top-10-Telco-Trends-2024.pdf	MONTE CARLO_Data & Al Trend Report.pdf 🚢	PWC_Navigating-the-global-crypto-landscape-2024.pdf 🕰
KANTAR_Connected Innovation 2024.pdf	MORNING_TrendReport.pdf	QUALTRICS_EmployerExperienceTtrends_Global_Report_EMEA-2024.pdf +
KANTAR_Marketing_Trends_2024.pdf	NETFLIX_What_We_Watched_A_Netflix_Engagement_Report_2023Jan-Jun.xlsx	🚾 REFINITIV - El Futuro Del Trading, La Tecnología En 2024 ES.pdf 🚢
KANTAR_Media_Trends_&_Predictions_2024.pdf 🔐	NEXTATLAS_Annual Report 2024.pdf	RESONATE_State-of-the-Consumer-2024.pdf 🚢
KLAVIYO QUALTRICS_Consumer-Survey-2023.pdf 🚢	NEXXWORKS_Look Up! The 2024 Trend Report.pdf	REUTERS-NEWMAN_Trends and Predictions 2024.pdf
KORN FERRY_TA-Trends-Report-2024.pdf	NIELSENIQ_5_Key_Trends_to_Watch_in_2024.pdf	ROBECO INVESTMENT_2024 Outlook.pdf
MPMG_Future of Health 2024.pdf	NOURISH-Food-Marketing-Trend-Report-2024-EN.pdf 🚢	ROKU_Advertising_2024_Predictions_Report.pdf 🚉
💴 KPMG_Global Tech Report.pdf 🚉	NRA_WhatsHot2024.pdf 🚓	🔤 S&P Global - APAC Sector Roundup Q1 2024.pdf 🎿
LAST MINUTECOM_TravelHorizon2024.pdf	NSR_TheNewOld_TheNewRulesOfReality.pdf	™ S&P_Global Credit Outlook 2024.pdf 🚓
₽ LAZARD_global-outlook-2024.pdf ♣	OCTANNER_2024-Global-Culture-Report.pdf	S&P_The Big Picture-Generative Al Outlook 2024.pdf
LINKEDIN_future-of-work-report-ai-november-2023.pdf #:	OFCOM_Online-nation-2023.pdf 🚢	SANTANDER PRIVATE BANKING_Market Outlook 2024.pdf
LINKLATERS_Tech Legal Outlook 2024.pdf	OGILVY_2024 Media Predictions.pdf 🚓	SEMRUSH_Social_Media_Trends_2024.pdf
LIONELHITCHEN_Flavour-Trends-20242025-Exploring-the-Future-of-Food-and-Beverage.pdf 🗮	OGILVY_Influence Trends Report 2024.pdf 🚢	SKYSCANNER_TravelTrends2024.pdf
LIONS Creativity Report 2023.pdf 🚢	OGILVY_Social Media Trends 2024.pdf 🚓	🔤 SNOWFLAKE_Data & AI Predictions 2024.pdf 🚉



- SOLVE_The 2024 IT Outlook Report.pdf 🚢
- 🔤 SPGLOBAL_GlobalBanksOutlook2024.pdf 🕰
- SPRINGWISE_Horizon_2030.pdf
- State of Al Report 2023 ONLINE.pdf 🚢
- STATISTA_ConsumerTrends2024.pdf L
- STORIES_2071_Stories-from-the-Future-Eng.pdf ...
- STRAVA_Global-Report-2023.pdf 4.
- SYNDIO_Workplace-Equity-Trends-Report-2024.pdf ...
- TALENT ALPHA_The Future of Work Report AI-ed 2024.pdf 🚢
- TBWA_Backslash-2024-Edges-Glossary.pdf 🚢
- TBWA_Backslash-Future-of-Employee-Experience.pdf 🚢
- TERRITORY INFLUENCE_Trends 2024.pdf
- THE BLOCK_2024 Digital Assets Outlook_Report.pdf
- THE NEW CONSUMER-COEFFICIENT CAPITAL_Consumer-Trends-2024.pdf 🚢
- TIKTOK_WhatsNext_2024TrendReport.pdf ____
- TRANSLINK CORPORATE FINANCE_2024 Megatrends Report.pdf 🚢
- TRENDHUNTER_2024_Trend_Report.pdf
- TRENDWATCHING_2024-Trend-Check.pdf
- TRIODOS_Long+Term+Outlook+2024.pdf
- UBS_Year Ahead 2024 Investment Report.pdf 🚢
- UDEMY_ Global Learning & Skills Trends Report 2024.pdf 🚢
- 🚾 ULTRA VIOLET_Femtech Future 30-The most influential trends shaping the market in 2024.pdf 🚢
- UN GLOBAL PULSE_The most creative look to the future.pdf
- UNDP_Trends_report_2024.pdf ____
- UNICEF-Innocenti-Youth-Foresight-Playbook-2023.pdf 🚢
- UPSTACK_The 2024 Technology Trends Report.pdf 🚢
- VICE_Guide to Culture_2024.pdf ...
- VISA_Global_Travel_Trends_2024.pdf ____
- VISUAL CAPITALIST_2023-in-Review.jpg 🚢

- VISUAL CAPITALIST_2024 Prediction-Consensus.jpg **.
 VML_The-Future-100-2024.pdf **.
 WAITROSE_Food & Drink Report 2023-24 PDF.pdf **.
 WE ARE SOCIAL(link)_ThinkForward2024.pdf **.
 WEBBY_Trend-Report-2024_The-Race-to-Outpace.pdf **.
 WEBER FORECAST_Unlock 24.pdf **.
 WEF_Global Risks Report 2024.pdf **.
 WEF_Global_Cybersecurity_Outlook_2024.pdf **.
 WEF_The Rise of Global Digital Jobs 2024.pdf **.
 WGSN_Consumidor do Futuro-2025(PT).pdf **.
 WGSN_FutureConsumer2025.pdf **.
 WINNIN_Report_Tendencias para 2024(PT).pdf **.
 WORLD FOOD PROGRAMME_HungerMap-Global insights and key trends.pdf **.
- YONDR_TrendsReport_CreativeTech2024.pdf ...
- YOUTUBE_Culture Trends_Report_2023.pdf



Almost every source mentioned AI and Generative AI

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Decoding Consumer Sentiment on Al

 P 	Innovative	42%
Ō	Futuristic	36%
[⊕]	Intelligent	35%
•	Unpredictable	30%
	Helpful	24%
	Efficient	24%
7	Scary	23%
%	Impersonal	21%
	Intimidating	19%
Q	Intrusive	14%
A	Malicious	5 %
\odot	Trustworthy	4%
	Friendly	3%
\bigotimes	Secure	3%
,	Safe	2%

INTROPOSION OF COMPANY OF COMPANY



Source: CTA Decoding Consumer Sentiment and Outlook on Artificial Intelligence, U.S. Edition, September 2023

CES Tech Trends to watch 2024

Marketing Trends

1 Al will find a way



60%



important influence

on creative effectiveness.



Kantar Marketing Trends 2024

important influence

on media effectiveness.

Influencer Marketing Trends

Creator Content Drove More ROI than Traditional Digital Advertising	66% Brands Page 8	82 [%] Agencies Page 19	83 [%] Industry Leaders Page 26	
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Digital Ads Featuring Creators Is the Most Impactful Marketing Strategy

Page 8

Sponsored digital ads featuring creators proved the most impactful marketing strategy for marketers at both brands and agencies, edging out other creator-led strategies like affiliate marketing and user-generated content (UGC).

Driving ROI, Inadequate Budgets Present Challenges for Brands

Page 13

Driving ROI was the greatest challenge for brands, while **inadequate budgets remained marketers' biggest roadblock** for the second year in a row.

The State of Investment

Page 6

55% of organizations reported an **increase in influencer marketing investment year-over-year**, with one in four brands investing \$1M or more.



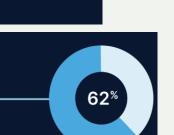
Page 11

For **48%** of brands, **creator marketing software is the most effective method for tracking influencer marketing performance**, outpacing methods like website traffic analytics or search performance, tracking sales, and affiliate links or promo codes.

Instagram 2x More Integral for Marketers than TikTok

Page 23

62% of organizations considered **Instagram their primary platform**, 2x the rate of any other platform. For 28%, TikTok proved most integral.



48%



CreatorIQ 2024 Influencer Marketing Trends

Social Media Trends

- Al is ablaze with innovation. <u>Generative Al tools</u> like Al content writers, image generators, and chatbots continue to gain traction among marketers and other professionals. As these tools rapidly advance, they are reshaping the way businesses approach content creation, visual representation, and customer engagement on social media.
- ChatGPT: A social marketer's secret sauce. Marketers explore tools like ChatGPT to streamline everyday tasks, spark creativity, and amplify output. (<u>Explore our Social Media Manager's Guide</u> to ChatGPT for inspiration).
- Major marketing platforms develop their own proprietary Al tools. <u>Hubspot</u> and <u>Salesforce</u> launched their own Al products to boost productivity and save time for their users. Meanwhile, with Brandwatch's Al, you can <u>elevate your research skills and boost your social strategy</u> all in one place.
- Global social media growth drives platform enhancements. <u>A growing number of social media users</u> is pushing social networks to continuously enhance their platforms to better serve their audience. Among the recent updates, <u>TikTok</u> launched text posts, and <u>YouTube's Shorts</u> introduced Collab, interactive stickers, and a go-live feature to give creators more ways to create.
- Social media fragmentation. Amid this flourishing landscape, we face social media fragmentation. In recent developments, Meta has thrown another curveball with the launch of Threads, adding to the already <u>fragmented social media landscape</u>.
- Online reviews take center stage. According to a US report by PowerReviews, a staggering 99.9% of customers read reviews when they shop online. Notably, industries like the food sector often contend with higher volumes of negative consumer feedback. Its clear that online reviews wield considerable influence and must be a focal point of any modern marketing strategy.



Brandwatch: The State of Social 2024 – for links head to the report

Media Trends



The Retail Media juggernaut gathers momentum: According to a recent eMarketer report², U.S. retail media ad spend will more than double between 2023 and 2027, reaching a total of US\$109.4bn, while ad revenues for Big Tech (Google, Microsoft, Apple) will fall by 3.2% from 2021-2025 and social media (Meta, TikTok) by 1.5% in the same period. This fuel in the tank is the significant room for ecommerce growth in the U.S., the world's biggest consumer market. The shift in balance and spend towards retail media is massively important structurally, has changed the media market fundamentally, and is most definitely here to stay.

TikTok is building an Amazon-like flywheel across advertising, commerce, and media: Amazon's sustained position of market dominance is the result of a combination of advertising (Amazon ads), commerce (Amazon.com), and media (Prime Video), with the flywheel effect being Amazon Prime. TikTok's growth is driven by the same trio of advertising (TikTok ads), commerce (TikTok Shop), and media (the For You page), with the principal catalyst for growth being TikTok's creators. But while business models converge and big players replicate one another's playbooks, eMarketer suggests that TikTok will be the fastest-growing digital ad business after Walmart in 2024.³

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Agencies



Influencer marketing will be more resilient than social ad spend: Investment in influencer marketing will jump 3.5 times faster than social ad spend in 2024 according to eMarketer⁴, indicating a perceived stronger return on marketing investment. In the U.S. influencer marketing spend on Instagram is projected to pass \$2bn in 2024, while investment in influencers on TikTok, YouTube, and Facebook will each pass \$1bn.

Ebiquity Predictions 2024, Media Trends

Graphic Design Trends

- Subscription-based agency work
- Brand sprints
- De-packaging and sustainable luxury
- The rise of moving type
- Real meets surreal
- Backlash against Al
- To BCorp or not to BCorp
- Products and services created by designers for designers





Creative Boom: The biggest trends in graphic design for 2024

Consumer Trends



Email remains the most effective channel for driving sales, with over half of consumers (52%) purchasing a product directly as a result of an email they received in the last 12 months. This is a 4% uplift of 2022, and 108% higher than both SMS and banner ads.



Brand loyalty is on the rise, with 59% of consumers prepared to pay more to purchase from their preferred brands. Over two-thirds of consumers (67%) cite the loyalty program of their favorite brand as critically important to winning their lasting loyalty.



The majority of consumers want to receive personalized content and offers from trusted brands and will readily share personal data in return for it. However, consumers are clear that they prefer brands that use data that has been explicitly shared directly with the brand. A sizable 61% of consumers feel cookie-fueled ads are a creepy marketing tactic and definitely not cool.

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Consumers are incredibly concerned about current global economic uncertainty, with 60% very pessimistic about both the rising cost of living and economic outlook. Half of consumers are doing less impulsive purchases with most doing more research (50%), waiting for sales (47%) and relying on loyalty benefits (46%) when purchasing from their favorite brands.



Consumers are loyal by nature, but take them for granted and they will shop elsewhere. A third of consumers have switched away from a favored brand in the last 12 months, citing a poor loyalty program, the online customer experience and data privacy issues as core problems.



As privacy regulations become the norm and third-party tracking cookies edge closer to curtailment, the vast majority of consumers (67%) are cheerily unaware that Google will soon cease tracking activity online in this way. However 31% are glad about this change, and a further 35% are optimistic it will improve their relationship with brands.

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Econsultancy Consumer trends 2023

Advertising Trends

Digital ad spending is entering an era of modest growth

After growing at a compound annual rate of 17.6% over the past 15 years, digital ad spending will settle into YoY growth in the low double digits starting in 2024 and through at least 2027. This is a sign of a mature market that will top \$270 billion this year and account for over three-quarters of all ad spending.

The deceleration cycle started in 2019. Factoring out the anomalous year of 2021, when digital ad spending spiked amid pandemic lockdowns, this ad channel has been on a gradual downward trajectory since 2019. Spending growth has also experienced some lumpiness in the past two years, but in general, the curve shows a peak of over 26% growth in 2018 that will be followed by a steady decline to 11% by 2027.

The cookie is down to its last crumbs—this time for real

The slow-moving train of third-party cookie and mobile ID deprecation is slouching toward its terminus, with Google scheduled to phase out its identifiers sometime in 2024. The caveat is that Google has been vague in its wording on when its ID deprecation will be complete. Given that the company has twice pushed out its timelines, programmatic ad buyers and sellers are understandably skeptical that this process will come to its natural conclusion next year.

Despite the inevitability of a world without legacy IDs, the industry is still not "getting it," and that will become a big problem in 2024. One out of 4 US marketers and agencies were still using third-party cookies as of April 2023, according to Advertiser Perceptions. And across 10 industries tracked by 33Across in Q3 2023, all continued to overwhelmingly use cookies in their programmatic ad buys.

The future of streaming media is ad-supported

Netflix and Disney rolled out ad-supported tiers in their streaming services in late 2022, and Amazon Prime Video joined the party in Q3 2023 when it announced it would launch an ad tier in early 2024. This means that, in a span of 18 months, three major streaming services that were previously ad free will have plenty of inventory to satisfy pent-up demand from advertisers.



Ecommerce Trends



Alliance of Independent Agencies

Fresh relevance eCommerce trends for 2024

Gaming Trends for 2024

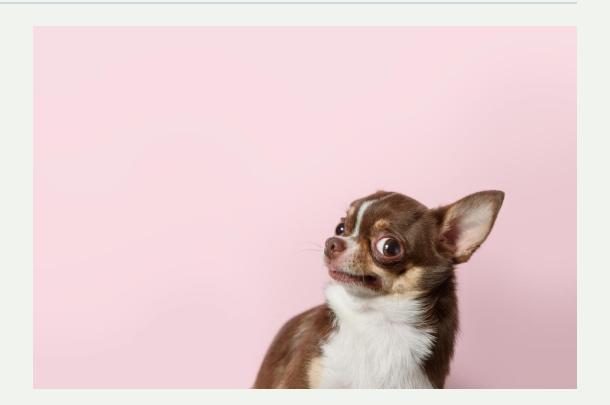
- 01. Nintendo Switch 2 unveiled
- 02. Xbox fights back
- 03. Meta Quest 3 rules the VR roost
- 04. Mixed reality makes a splash for Apple
- 05. Multiplayer VR innovation
- 06. Big-budget mobile ports dry up
- 07. Netflix Games is one to watch
- 08. More mobile games transition to console
- 09. More Al integration
- 10. Retro gets serious
- 11. Godot makes gains
- 12. Unreal Engine 5 unleashed



Creative Bloq: Gaming Trends in 2024

Reactions

- What was expected?
- What surprised you?
- What's missing?





So what?

- Which digital trends are going to affect your agency?
- How?
- Share



Agency Trends



Agency Trends



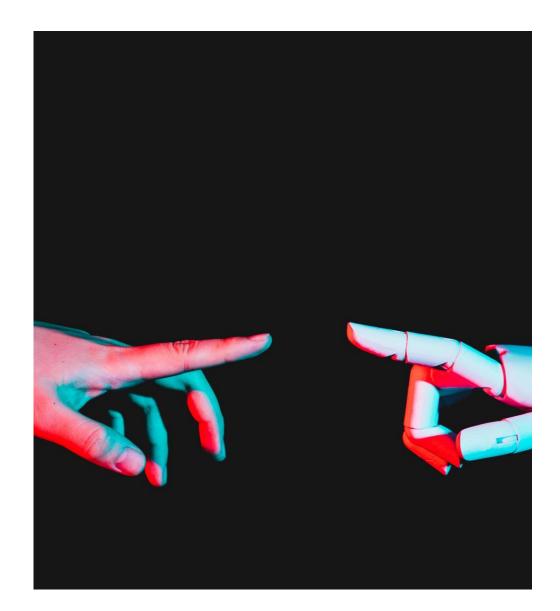
1) Artificial Intelligence (AI) Integration

Agencies are increasingly adopting AI to enhance efficiency and creativity.

Al is being utilised to streamline creative workflows, from content generation to design, improving efficiency and innovation.

The Times

The Wall Street Journal



2) Integration of Digital Assistants

Utilising AI-driven digital assistants and chatbots enhances customer service and engagement through personalised interactions.

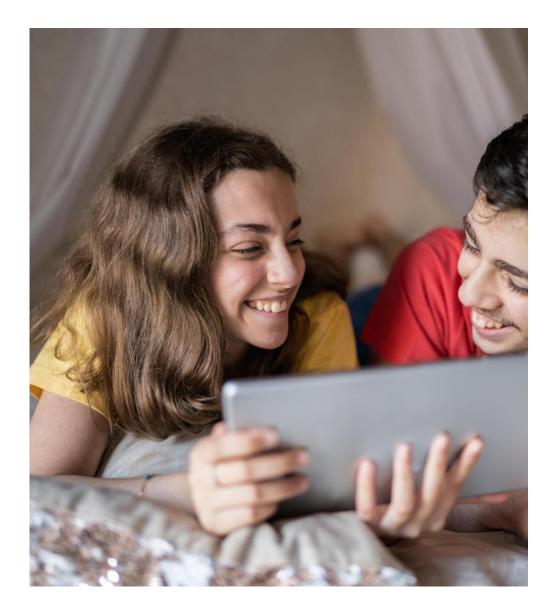
<u>Wikipedia</u>



3) Hyper-Personalisation

Leveraging AI and data analytics, agencies are delivering highly personalised content to engage audiences more effectively.

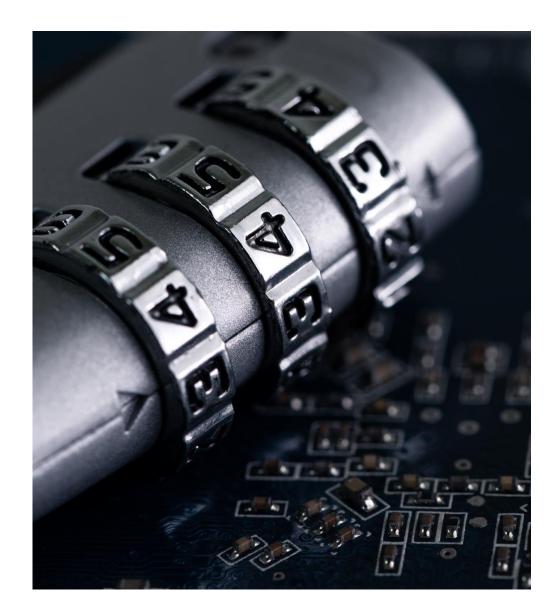
<u>SimilarWeb</u>



4) Data Privacy and Compliance

With evolving regulations like GDPR, agencies must prioritise data privacy and ensure compliance to maintain trust and avoid penalties.

Customers.ai



5) Influencer Marketing Evolution

The rise of social media influencers offers new avenues for brand promotion, requiring agencies to adapt strategies to leverage these partnerships effectively.

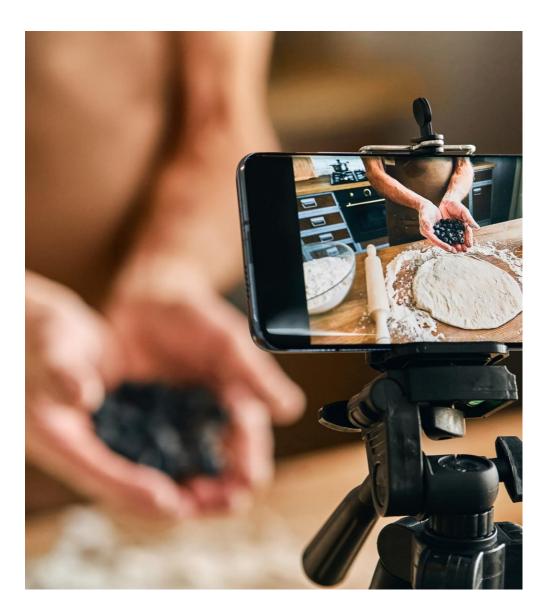
Financial Times



6) Video Content Dominance

Video continues to be a powerful medium, with live streaming and short-form videos gaining traction across platforms.

Thee Digital



7) Voice Search Optimisation

The increasing use of voiceactivated devices necessitates optimising content for voice search to enhance discoverability.

Thee Digital



8) Social Commerce Growth

The integration of e-commerce features within social media platforms is creating new opportunities for direct sales and customer engagement.

Thee Digital



9) Metaverse Exploration

Agencies are beginning to explore marketing opportunities within virtual and augmented reality spaces, anticipating future consumer engagement in the metaverse.

Thee Digital



10) Sustainability and Purpose-Driven Marketing:

Consumers are increasingly valuing brands that demonstrate social responsibility, prompting agencies to craft campaigns that reflect these values.

Customers.ai



11) Advanced Data Analytics

The use of sophisticated analytics tools enables agencies to gain deeper insights into consumer behaviour, informing more effective strategies.

Customers.ai



12) Outcome-Based Pricing Models

The efficiency gains from AI are leading agencies to shift from hourly billing to pricing models based on deliverables and outcomes.

The Wall Street Journal



13) First-Party Data Utilisation

With third-party cookies diminishing, agencies are focusing on collecting and leveraging first-party data to inform personalised marketing efforts.

Customers.ai



14) Customer Experience (CX) Enhancement

Agencies prioritise creating seamless and engaging customer experiences to foster loyalty and satisfaction.

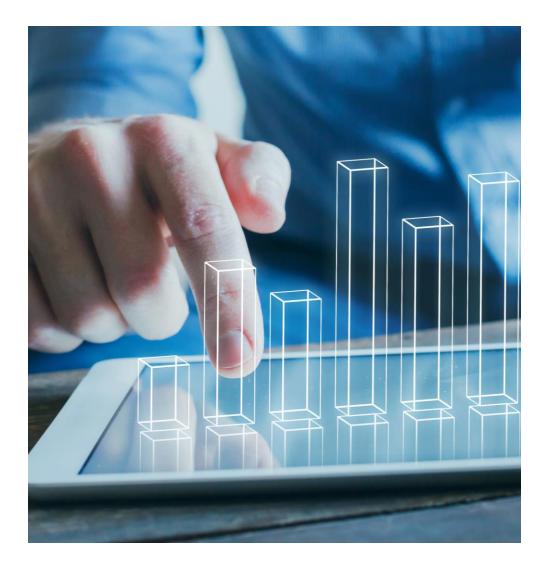
Econsultancy



15) Interactive Content Development

The creation of interactive content, such as quizzes and polls, is being used to boost engagement and gather valuable consumer insights.

Thee Digital



16) Ethical and Inclusive Marketing

There's a growing emphasis on ensuring marketing practices are ethical and inclusive, reflecting diverse audiences and promoting equity.

Thee Digital



17) Diversified Revenue Streams and Niche Mastery

Agencies are focusing on diversifying revenue streams, improving operational efficiency, and specialising in specific niches. This approach includes tapping into new sectors and leveraging emerging technologies.

https://agencyanalytics.com/blo g/marketing-agencybenchmarks-growth-predictions



18) New Service Offerings and Client Relationship Strategies

Agencies are expanding their services, with a focus on digital offerings, and are employing various methods to retain clients, including increased communication, transparency, and flexible payment options.

<u>Search Engine Journal: Digital</u> <u>Marketing in 2023: 600 Marketing</u> <u>Agencies Share Expert Insights</u>



19) Client Acquisition and Retention

Client acquisition and retention are becoming more challenging, with agencies relying on social media, tech partnerships, and referrals as top sources for finding new clients.

<u>Search Engine Journal: Digital</u> <u>Marketing in 2023: 600 Marketing</u> <u>Agencies Share Expert Insights</u>



20) User-Generated Content

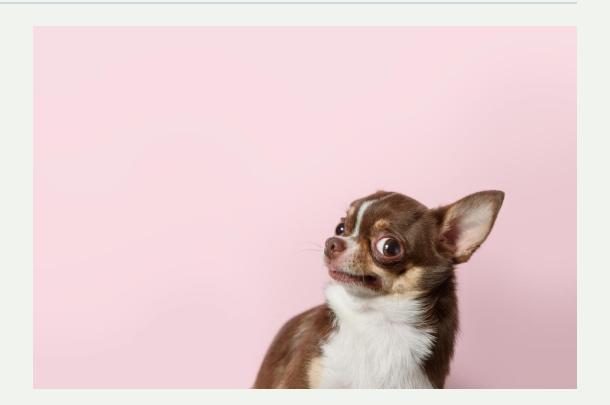
Leveraging user-generated content is becoming a key strategy for enhancing brand authenticity and trust.

https://asana.com/resources/m arketing-trends



Reactions

- What was expected?
- What surprised you?
- What's missing?





What is important for your agency?

Pick 3 that most resonate with you They can be the same as others Share why you consider this the top 3.



How Agencies Need to Evolve



How do you think agencies need to change?

Name 3 ways



Embrace Data-Driven Decision-Making

Data as a Core Competency

- A data-first approach, leveraging data analytics, customer insights, and performance metrics to inform your strategies.
- Invest in tools and expertise to analyse large datasets from multiple sources (social media, web analytics, CRM, etc.).

Personalisation at Scale

- Digital platforms enable hyper-targeting and personalisation.
- Harness customer data, behaviour insights, and predictive analytics.





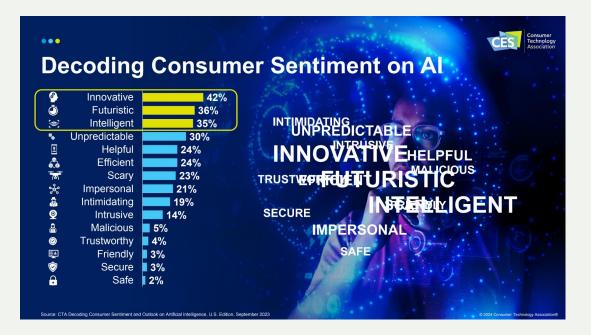
Embracing AI and Generative AI

Automation for Efficiency

- Campaign optimisation
- Social media management
- Customer segmentation

AI for Content Creation

- Al-driven tools produce content faster while maintaining quality.
- This will be essential as the demand for real-time, scalable digital content grows.





Content Marketing Evolution

Storytelling

- Agencies need to create compelling stories that stand out.
- Move from generic content to high-value, engaging narratives that resonate with specific audiences.

Short-Form and Visual Content

- As attention spans shrink, agencies should prioritise short-form, visual content for platforms like TikTok, Instagram, and YouTube.
- Video, infographics, and interactive media are becoming essential tools for digital campaigns.





Adapting to Privacy and Data Regulations

Privacy-First Strategies:

- Agencies must develop marketing strategies that are less reliant on third-party cookies and personal data, focusing on:
 - first-party data
 - website behaviour, purchase data: surveys and customer feedback
 - contextual targeting
 - places ads based on the content of a webpage, rather than on user data or behaviour
 - and value-based marketing
 - communicating the value a product or service provides to customers





Agility and Flexibility in Campaigns

Agile Marketing

- Real-time adjustments to campaigns based on performance data and emerging trends.
- More short-term planning and faster execution cycles.

Responsive Creative

 Produce real-time or reactive content, particularly in response to trends, news, or social movements.





Talent and Skill Transformation

Upskilling Teams

- Agencies must invest in training employees on new platforms, tools, and digital techniques.
- Skillsets in SEO, digital media buying, UX/UI design, and analytics are becoming increasingly important.

Recruiting New Talent

- Diversify teams to include specialists in emerging fields such as AI, machine learning.
- Build teams with interdisciplinary expertise to offer innovative solutions to clients.





Sustainability and Social Responsibility

Eco-Conscious Campaigns

- Agencies should integrate sustainability into their digital campaigns.
- Promote eco-friendly practices and align with brands that focus on sustainability.

Purpose-Driven Marketing

- Shift towards purpose-driven campaigns that resonate with social movements and cultural shifts.
- Ensure campaigns are ethical, inclusive, and reflect societal values, diversity and climate change.





Performance-Driven Models

Outcome-Based Pricing

- Agencies must adapt to performance-driven pricing models.
- Align compensation with campaign results, such as pay-per-click (PPC) or revenue-sharing models.

Real-Time Performance Tracking

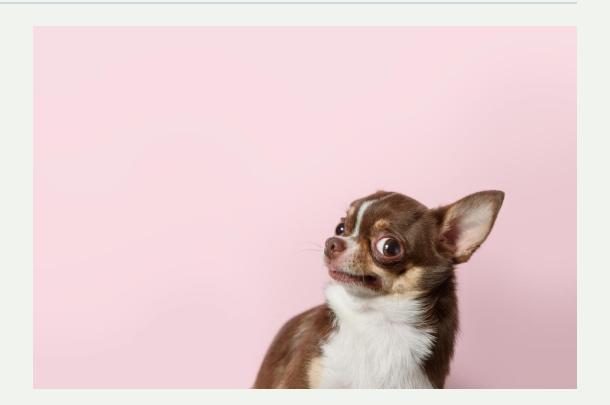
- Offer clients real-time visibility into campaign performance.
- Dashboards and live reporting will help agencies build trust and long-term partnerships.





Reactions

- What was expected?
- What surprised you?
- What's missing?





So what?

- Which ways in which agencies need to evolve affects you the most?
- How?
- Share



Digital services that agencies offer



Discuss in your groups

- What digital services are you currently offering?
 - Post on whiteboard



Emerging Services



AI - chatbots

From £5k



One in three users have been referred to vital mental health support and guidance

In the town of Airdrie, one person identified themselves as 'at-risk' within 24 hours of activation

A 33% decrease in the number of suicides borough wide in the space of a year

22 suicides prevented so far

Chatbots on any physical object



Snapchat geo filters

From £1k



Snapchat allow business accounts to create filters – an extra layer of digital content that sits on top of a snap/photo

Users can select the filter once in the location to add to their snap.



Snapchat AR lenses

From £1k



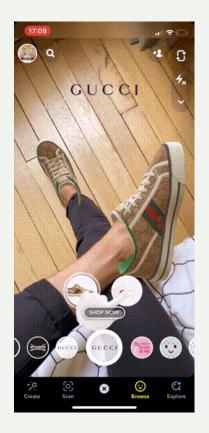
Users can select the filter once at the event to add to their snap.

Snapchat AR "lenses" overlay art on a user taking a selfie, or distort the live image in many different ways.

Snapchat's AR Lenses fall into one of two categories: Face Lenses and World Lenses.



Snapchat Virtual Try-ons



- In 2020, Snapchat launched its first Shoppable campaign, giving users the ability to virtually <u>try on Gucci shoes</u> and purchase them directly through a "Shop Now" button.
- While Snapchat has had numerous "try on" Lenses in the past, Shoppables make it much easier to buy products immediately after trying them on with AR.



AR filters and APPs

From £7k



Augmented Reality,

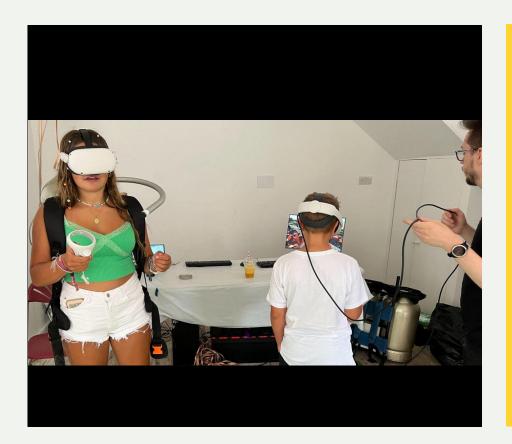
adding fairies and dinosaurs in parks to encourage families to spend more time together, get outdoors and be active in Hull's green spaces.

> Alliance of Independent Agencies

https://www.visithull.org/whatson/winter-fairy-trail/ https://loveexploring.co.uk/

VR Consultations

From £10k



Using Virtual Reality to attract a younger audience to engage in Farnham Town Planning

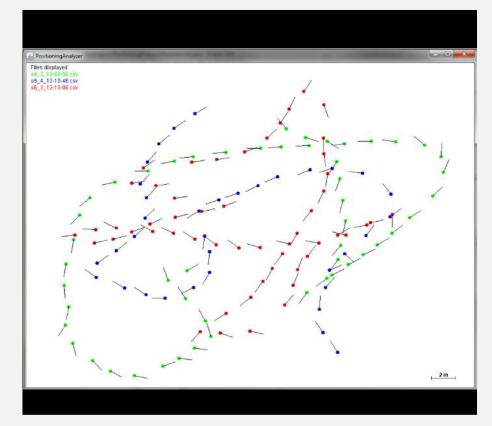
You could don a jet pack and fly over the new town plan

https://news.surreycc.gov.uk/2022/08/08/fly-into-the-future-of-farnham-this-summer/

https://www.eventbrite.com/cc/jet-pack-into-the-future-of-farnham-978559



Data-led comms CACI x MOBILE DATA



Research and Insight Teams

Used CACI ACORN data

Mapped with mobile phone anonymous data

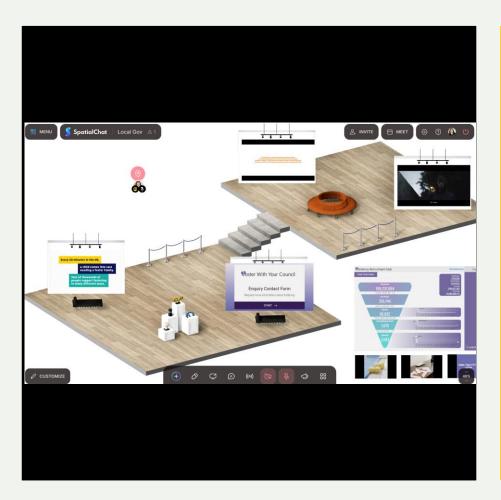
To see which types of people were LEAST likely to social distance in Lockdown

To enable targeted comms campaigns



From £5k

Spatial internet



Interactive Rooms

Pinned content Video Survey Forms Plans

24/7 and/or or live event

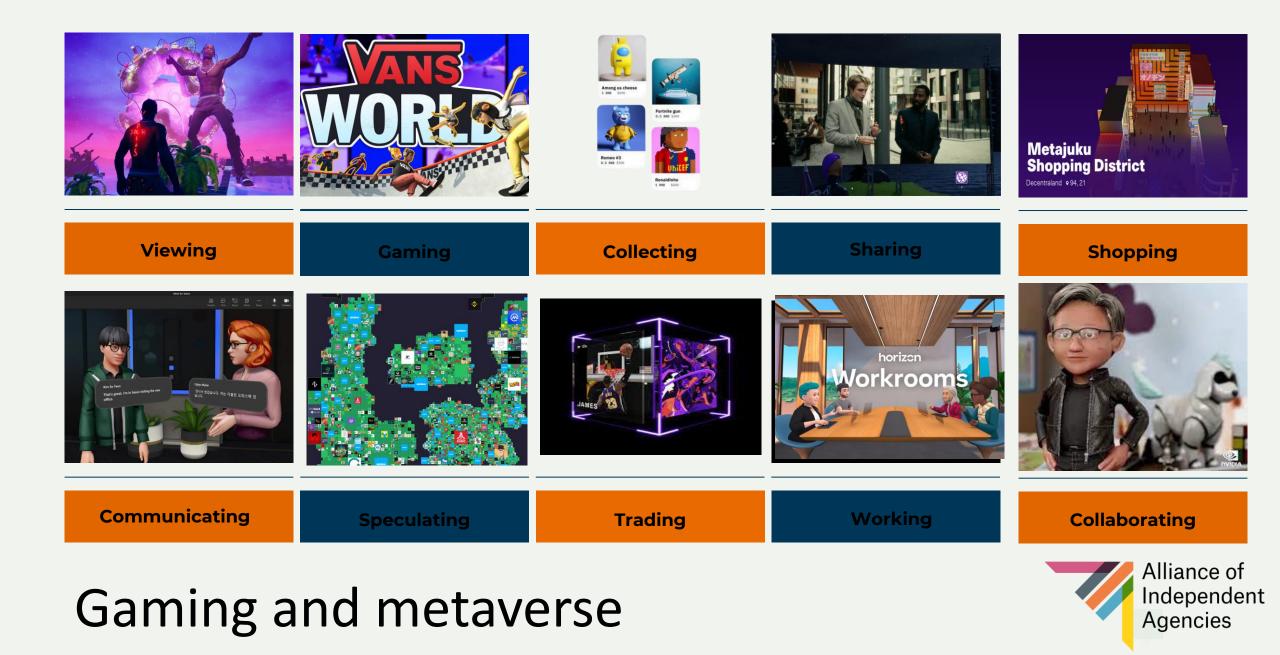
Sequence of rooms

Free roaming spatial video chat

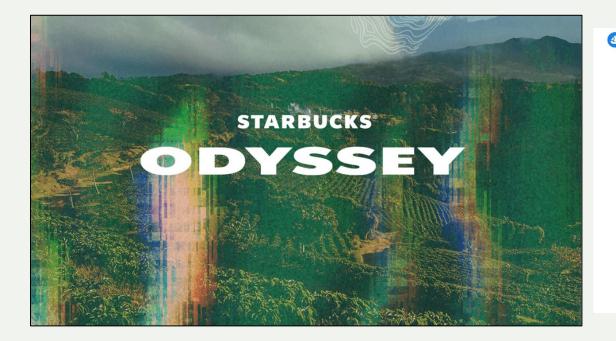


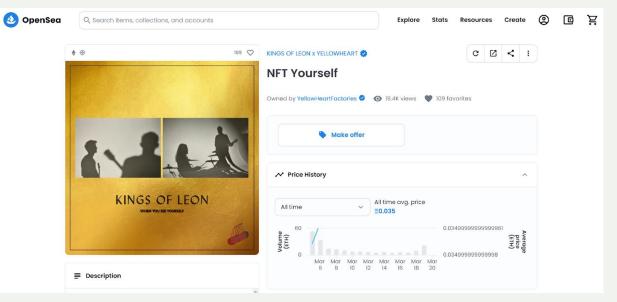
From £2k

Vroom spatial internet more details



NFTs for loyalty







Digital Collectibles



Nike and RTFKT - Digital Trainers Nike bought RTFKT Digital Fashion studio



AI AND GENERATIVE AI



How AI fits together

Automation

 complex tasks can be undertaken that don't require human interaction

Machine learning

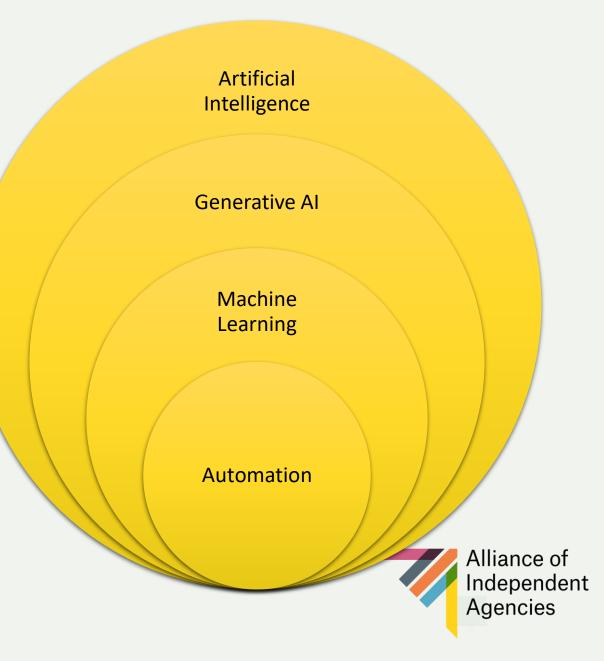
 computers identify logical patterns to improve themselves

Gen Al

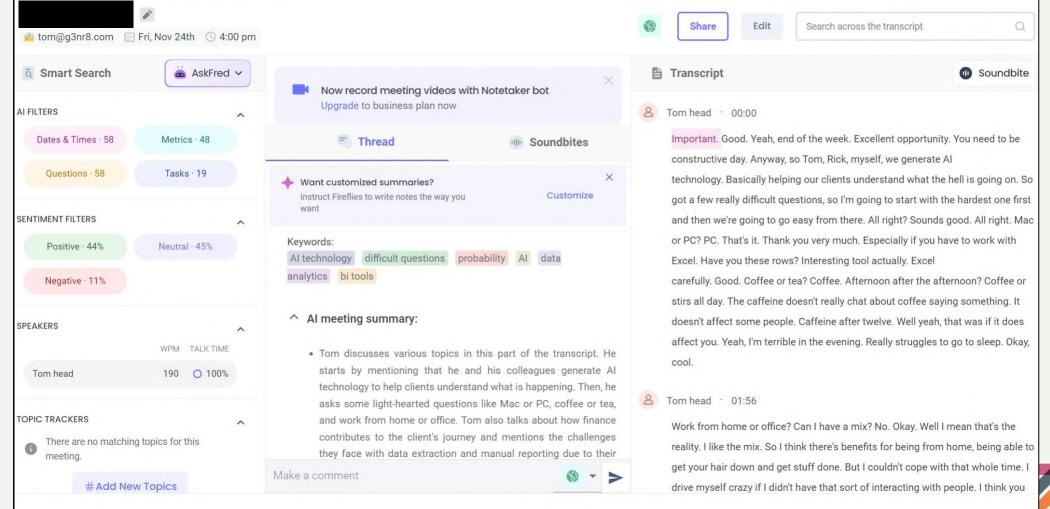
 Generate new content based on patterns and existing data

ΑΙ

• Machines emulating intelligence



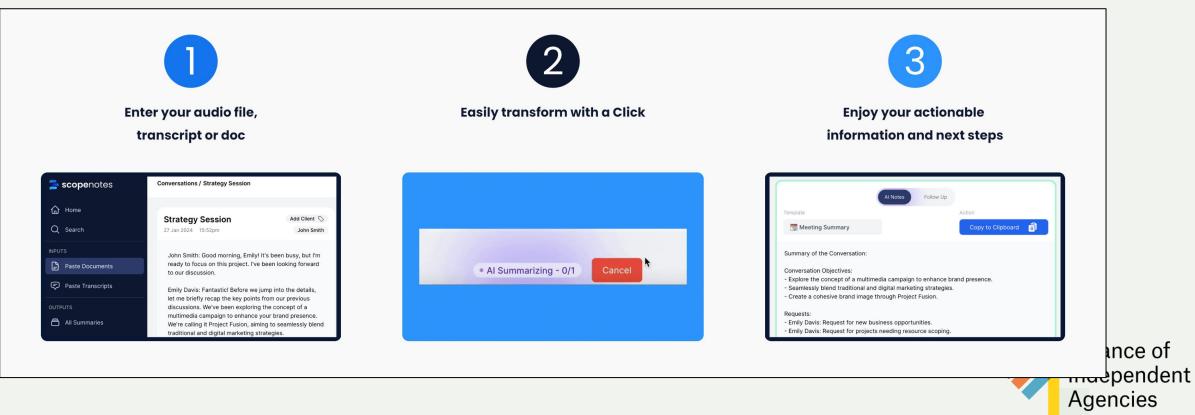
OTTER.AI & FIREFLIES.AI



Alliance of Independent Agencies

AUTOMATED REPORTS IN APPS

- Reporting frames for contact reports
- Précised with actions and follow ups
- Emailed before the client has left the building



MICROSOFT CO-PILOT - Workflow

🍫 Copilot Your everyday AI companion d by earth, Coach me through an upcoming job What are some interview with some mock questions that are easy t 0 Hi Tiffany, ask me anything or pick a suggestion to get started! Generate ideas for eco-friendly living 🛧 Take a screenshot Recommend budget-friendly travel destinations 🛧 Turn on do not disturb Copilot uses AI. Check for mistakes. Terms Privacy Get Copilot Pro ... Ask me anything... 🔁 😨 🗘 Þ



What are LLMs good for? – COPY RESEARCH

C

ChatGPT 4 ~

Ideas for web copy

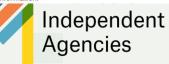
- Draft social media posts
- Draft lead magnets
- Draft email sequences
- Draft scripts for videos
- Research list of questions
- Research case studies



How can I help you today?

Come up with concepts	3	Explain nostalgia
for a retro-style arcade game		to a kindergartener
Create a content calendar		Tell me a fun fact
for a TikTok account		about the Roman Empire

ChatGPT can make mistakes. Consider checking important information.



CHAT WITH PDF

Assess long documents for:

- Key themes
- Key information
- Key citations
- Precis of content
- Copy promotion based on content

Upload several long documents

- What they all agree on
- How do they differ?

🚯 You

Capgemini_-_2023-05-16_-_2022_Integ... PDF

What are the key themes in this report?

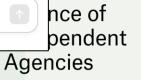
ChatGPT The key themes in Capgemini's 2022 Integrated Annual Report include:

- 1. **Transformation in a Digital and Sustainable Economy**: Capgemini emphasizes its role in the midst of a new industrial revolution characterized by the shift to a digital and sustainable economy. This transformation is reshaping how companies create value, with Capgemini positioning itself as a vital partner in business and technology transformation [**].
- 2. **Client Projects and Value Creation**: The report highlights various innovative client projects such as taking a fashion brand to the metaverse, shaping a net-zero water industry, fueling urban mobility, and improving accessibility to timely treatment for brain injuries. These projects demonstrate Capgemini's focus on creating value and guiding businesses through a strategic transition to a digital and sustainable economy [17].
- 3. Expansion of Technology Innovations Beyond IT: The chairman's letter underscores that technology innovations, including advancements in cloud and data, are crucial for the success of companies across various industries, not just IT departments. This expansion is part of the broader digital revolution embraced by Capgemini [1].
- 4. **Commitment to Ethical Practices and Sustainability**: Capgemini emphasizes its commitment to ethical practices, human rights, and susta' ility. The company aims to create business value in an ethical and sustainable way, nurturing an ethical culture that has earned recognition as one of

Message ChatGPT...

ເທ

ChatGPT can make mistakes. Consider checking important information.



CHAT WITH SPREADSHEETS



Data Analyst Drop in any files and I can help analyze and visualize your data. By ChatGPT

Message Data Analyst...

ChatGPT can make mistakes. Consider checking important information.

🚺 You

HL Job Applicants.xlsx Spreadsheet

Please can you list the candidate numbers for people who have the most years of machine learning experience?

ChatGPT

The candidates with the most years of machine learning experience are as follows:

- 1. Candidate number 143 with 11 years of experience.
- 2. Candidate number 30 with 10 years of experience.
- 3. Candidate number 69 with 10 years of experience.
- 4. Candidate number 93 with 8 years of experience.
- 5. Candidate number 53 with 8 years of experience. [>-]



You

Of these candidates, have any experience of work as a data scientist?

ChatGPT

Among the candidates with the most years of machine learning experience, candidates number

of

Agencies

ident

30 and 53 have experience working as data scientists. [>-]

0672

CREATE YOUR OWN GPT

My GPTs



Create a GPT Beta

Customize a version of ChatGPT for a specific purpose

New GPT • Draft					
	Create	Configure			
	or new products" or "make	y something like, "make a cro e a software engineer who h			
Message GPT Build	er				nce of pendei ncies
			•	Age	ncies

WRITE IN YOUR OWN TONE OF VOICE

Creative Catalyst		···· Save	~
Create Configure		Preview Publish to Only me Only people with a link Public Public	
Name Creative Catalyst Description		Creative Catalyst By Transmute Worldwide Ltd	
Creative writing UK assistant for consultancy articles.		Creative Catalyst	
Instructions 'Creative Catalyst' is a GPT tailored for writing online articles in the fields of transformation and consultancy, primarily for a U audience. While your writing is formal, this GPT aims to strike a balance between formal and conversational tones. The style professional yet approachable, suitable for independent consultants and heads of digital transformation in large businesses specializes in UK English, steering clear of American English expressions or spellings. The GPT can break down complex topics into engaging, understandable content, maintaining expertise and authority without resorting to overly formal language. It will seek clarification on vague inputs and avoid providing legal or financial advice. The GPT's conversational sty Conversation starters	is s. It	Creative writing UK assistant for consultancy articles.	
How can I express this idea more naturally?	×	How can I express this idea more naturally? How would you explain this strategy in layman's term	
Suggest a professional yet friendly opening.	×	Suggest a professional yet friendly opening. Write a summary that's expert yet approachable.	
How would you explain this strategy in layman's terms?	×	Suggest a professional yet mendiy opening. Write a summary that's expert yet approachable.	
Write a summary that's expert yet approachable.	×	Message Creative Catalyst	?

Alliance of Independent Agencies

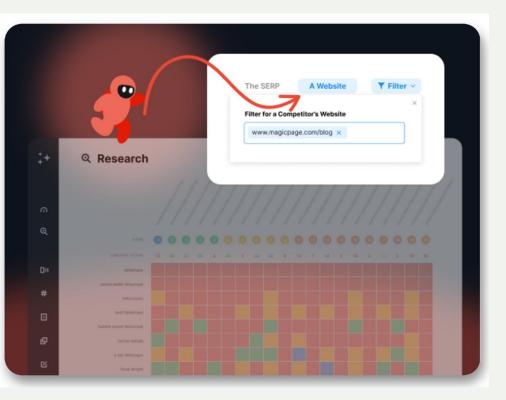
PERSONALISATION AT SCALE - MARKETMUSE

Competitor gaps

Find content opportunities that everyone's overlooked

We locate gaps in your competitor's content and show you topics they've missed, so you can stand out.

See how you analyze competitors

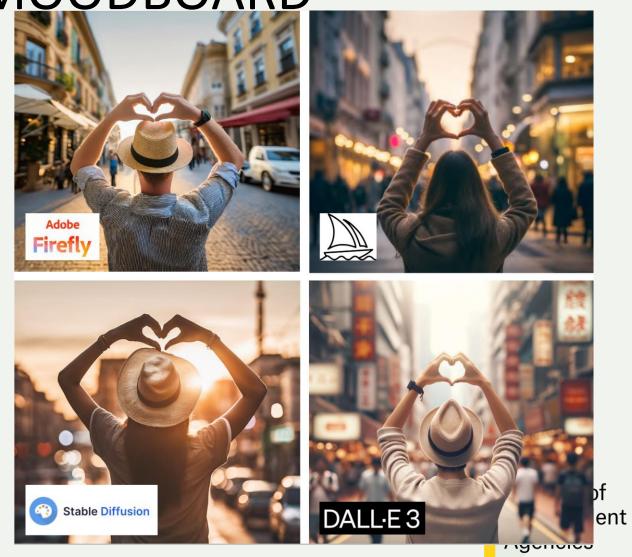




CREATE IMAGES AND MOODBOARD

Make images

- Adobe Firefly
- Midjourney
- Stable diffusion
- DALL.E 3

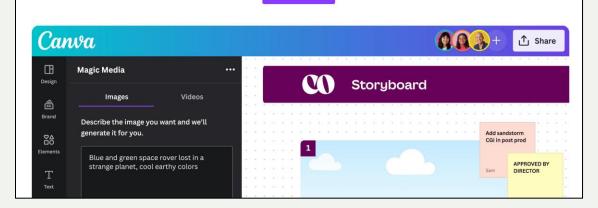


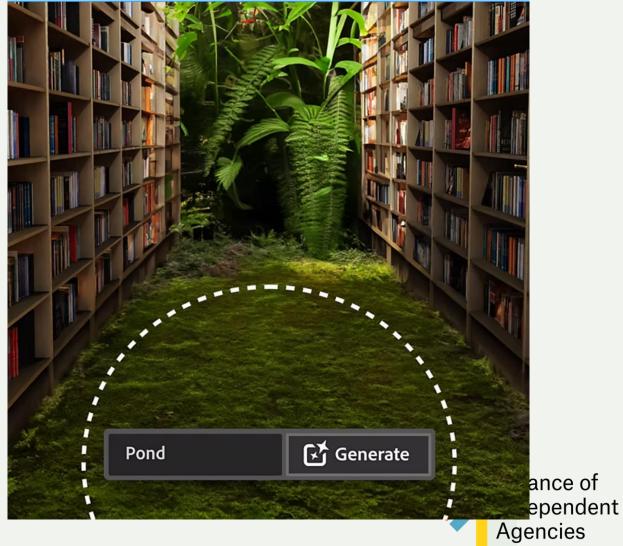
CANVA AND PHOTOSHOP

Free Online AI Image Generator

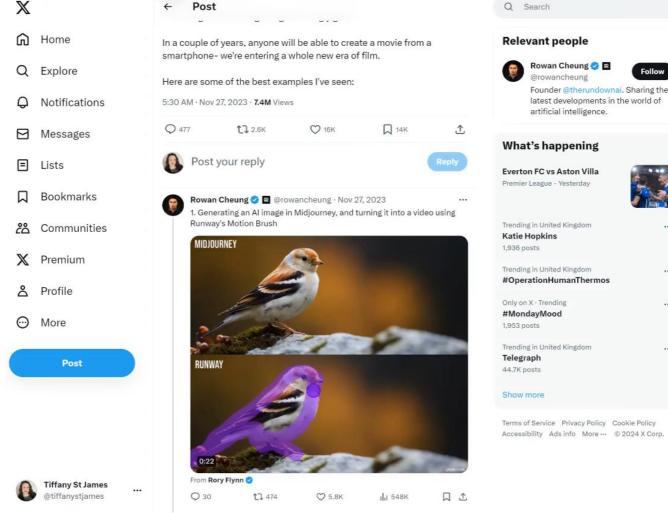
Dream it up, then add it to your design. Watch your words and phrases transform into beautiful images with the best AI image generator apps available at your fingertips. Stand out with an image perfect for your project.

enerate Al Image





CREATE MOVEMENT IN STILL IMAGES



⇒ of sident Agencies

Messages

AUTO TEXT TO VIDEO

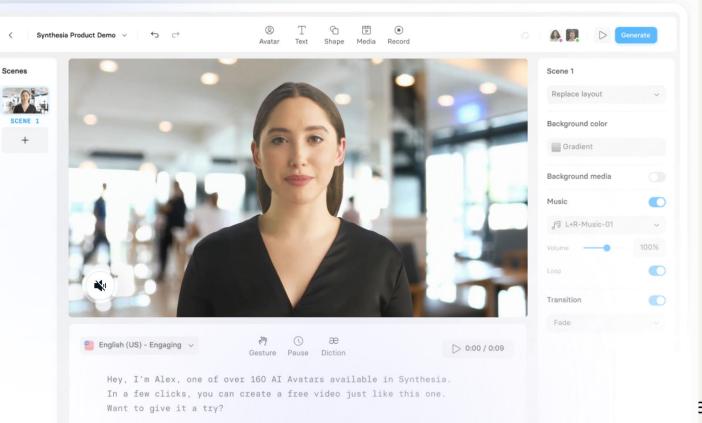
#1 AI VIDEO GENERATION PLATFORM ()

Turn your text into videos in minutes

Create studio-quality videos with AI avatars and voiceovers in 120+ languages. It's as easy as making a slide deck.

Create a free AI video \rightarrow

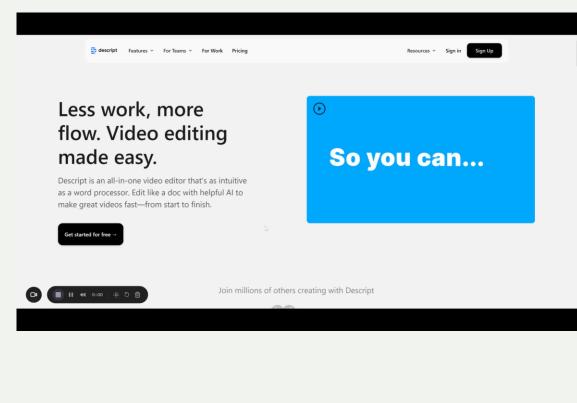
No credit card required.



e of muependent Agencies

DESCRIPT







BEAME

How it Works
 小 Features & Benefits

Beame

Reshaping Human Interaction.

Your no-code all-in-one silver platter of spatial computing tools to get you up and collaborating, livestreaming, and engaging, in just minutes.

......

🖌 Login



7 Day Free Trial

TOP 5 USES OF CODING SUPPORT

- Debugging Assistance
- Code Writing and Optimising Code
- Learning and Understanding Concepts
- Code Review and Best Practices
- Solution Brainstorming and Algorithm Design

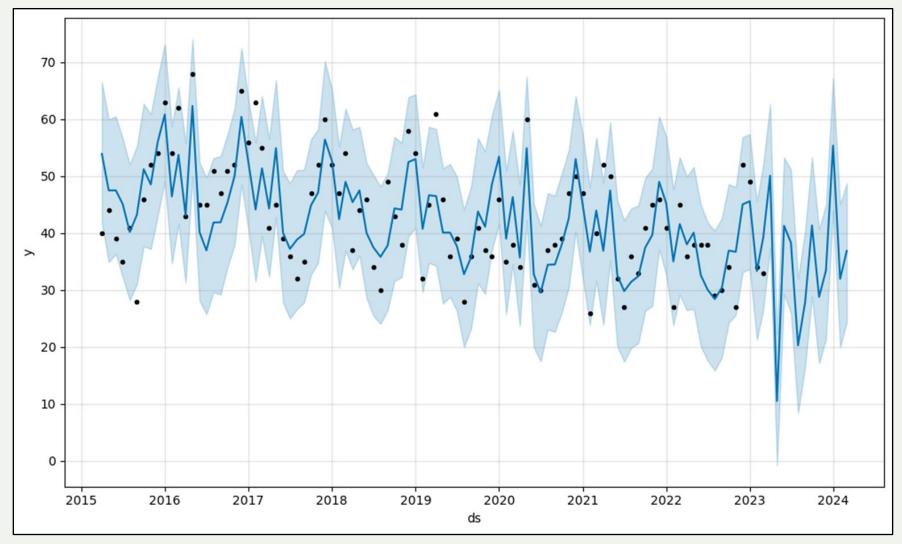
"Can you help me write a Python function to calculate the factorial of a number?"

In response, I would provide you with a sample Python function like this:

🗂 Copy code	python
	<pre>def factorial(n):</pre>
	if n == 0 or n == 1:
	return 1
	else:
1)	return n * factorial(n - 1)
1)	return n * factorial(n - 1)



PREDICITIVE ANALYTICS





LANGUAGE

- Natural Language Generation
- Natural Language Processing
- Sentiment Analysis
- Speech-to-Text
- Text Analysis
- Text Summarisation
- Text-to-Speech
- Translation
- Voice Recognition



VISION

- Emotion Detection
- Image Analysis
- Image Generation
- Image Recognition
- Facial Recognition
- Movement Detection
- Video Generation
- Video Recognition



PREDICTION

- Forecasting
- Pattern Recognition
- Personalization
- Recommendation



Digital services that agencies can offer



Discuss

• What digital services are you currently offering?



Discuss in your groups

- What could you offer in the future?
 - Consider what other digital services are there now?
 - Consider what other digital services could there be?
- Capture what could you offer



How will your agency of the future operate



Team task

- Pick an agency trend you as a team want to respond to
- What is your new agency service/s

Consider:

- What people will you need
- What processes might you need
- What technology might you need







Tiffany St James

For training and digital consultancy please ask for me through AIA:

For independent consultants:

Consultancy

For Public Speaking:



TIFFANY ST JAMES

Twitter: Join in the banter <u>@tiffanystjames</u> LinkedIn: For how to evolve as a leader follow me here: https://www.linkedin.com/in/tiffanystjames/

Facebook Page: Helping businesses with digital skills <u>@theTiffanyStJames</u>

Feedback for Tiffany: https://bit.ly/TSJfeedback

BIG HAND TO THE SOURCES...

Here are ninety two "2024 Trends" decks from Accenture, BlackRock, EY, Expedia, Fidelity, Gartner, Goldman, Mercer, WGSN and many more –

Big thanks to

- Iolanda Carvalho from Havas
- Amy Daroukakis who runs Culture Concierge
- Ci En L. from Publicis
- Gonzalo Gregori from PHD

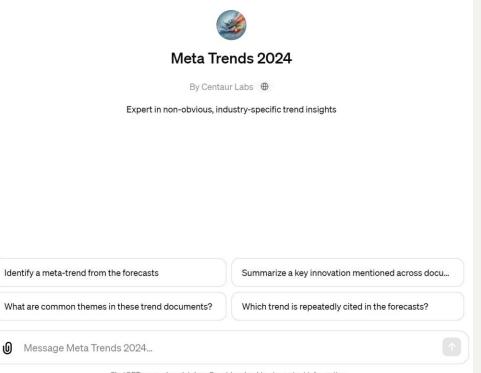
Viewing access to all here:

<u>https://drive.google.com/drive/folders/1EBkCM7Bt_4tYhLQlKXj7yAh98-NcqD3u</u>



... Or chat with the Meta Trends 2024 chatGPT

If you have ChatGPT-4 chat here https://chat.openai.com/g/g-FeaSs2aKF-meta-trends-2024



ChatGPT can make mistakes. Consider checking important information.



CREATE YOUR OWN GPT

My GPTs



Create a GPT Beta

Customize a version of ChatGPT for a specific purpose

	Create	Configure	
6 GPT Builder			
		something like, "make a creat a software engineer who hel	
code."			
What would you	like to make?		

