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Future Trends Working Group

Future Trends Volume 5: The future of content

Introduction

The way that brands can communicate with their audience is shifting dramatically. This is due in no small part to opportunities afforded by always-on consumers eager to consume and share interesting and entertaining content via digital media. As a result we're seeing more and more brands producing more and more content.

These developments have profound implications on the future of content. As the contributors to this paper highlight, as brands begin to behave more like media owners, there are huge opportunities ahead - as well as challenges to be faced.

One key opportunity that has opened up for brand communications is around the notion of addressable and personalised content. After all, if advertising can be targeted to individuals with different interests, demographics and behaviours then why can't content?

In this fifth instalment of the Future Trends Whitepaper series, experts from PHD/Unilever, Future Foundation, TMW, CEG Europe and of course the IAB, explore a range of issues brought about by this shift in behaviour from brands.

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Behave like a media owner

Rohan Tambyrajah, Global Innovation Director at PHD/Unilever, analyses what happens when brands adopt the properties of a media owner.

Since the birth of the web there has been much discussion around the notion of brands shifting from just using media owners as an outlet for their messaging and advertising, to adopting the properties of a media owner in their overall brand behaviour.

This notion has been drilled in to marketing plans under the guise of 'always on' or 'waterfall' marketing, and is representative of the fact that consumers now have unabridged access to brands on their terms, not just the terms dictated by a campaign between two fixed points in time. As a manifestation, these strategies tend to be the smaller, lighter pieces of online content that fill the gaps between the bigger, more attention grabbing spikes of advertising, and are used as means to maintain engagement over long periods of time.

For many, this has meant investing in publishing a stream of brand relevant content that offers their consumers something fresh to look at every day - which in many ways is no different from the behaviour of an online publisher.

It's understandable why a brand would want to behave like a media owner, particularly if you look how good media brands function for people. Firstly a good media brand will have a gravitational pull relative to the quality of its content. Secondly they are sticky and hold attention. But beyond that, they are also very good at fulfilling needs orientated around entertainment and information.

The last point is particularly valid in highlighting the changing role of brands online. Taking on board the properties of a media owner creates an opportunity for a brand to broaden its need scope and play a role that goes beyond the needs addressed by its core product or service offering. For example, if you are a home insurance brand, you can't feasibly talk to everyone about the benefits of your policies all year around, as consumers are only in market for very finite amounts of time. However, you could talk to them about tips to increase the value of your home or on how to create a better looking garden at any point in the year and irrespective of their stage in the journey to purchase.

[The Creators Project](#) from Intel and Vice is a great example of a brand broadening its scope and a case study in how a computer chip manufacturer can through content, build the license to talk about art, creativity and culture, and start to play a role where they are addressing the inquisitive needs of a young, affluent audience.

Becoming a media rich brand does not however imply that you will be able to draw people in to your owned channels in the way that established media brands do. There is a surfeit of content online in a highly competitive landscape. Brands need to manage both the creation and distribution of media assets to really establish themselves as go to points for the needs or territories they choose to occupy.

Of course a brand's existing advocates are most likely to be drawn in to any content initiatives. However these often tend to be the segment of consumers who are disproportionately exposed to its advertising - predominantly because they are existing users and will therefore be exposed to product and in store branding amongst the other media based advertising.

The opportunities for brand growth are most likely to come from medium, light and non-users of the brand. Therefore, all content initiatives need to be scaled to reach beyond those who are already predisposed to the brand. After all, it is now well appreciated that significant earned reach is an exception driven by creative excellence, rather than a rule.

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It's important to understand how as a brand, you can broaden the scope of needs that you are already addressing and work out where and how you can be useful to people in areas beyond your core offering. But it's also important to note that reach is often a driver of success, so all content should be scalable through appropriate paid media channels.

And finally, also interrogate what you define as 'media'. If you have a retail environment or product packaging, or in fact any branded asset that may fall out of the category of what is traditionally defined as advertising, does this make you a media owner? I would say yes, so perhaps it's time to start behaving like one.

Personalised content: Where next?

Karen Canty, Head of News at Future Foundation, examines what the future looks like for addressable and personalised content.

Content marketing is the Holy Grail for modern marketers. Brands the world over are breaking new ground by becoming entertainers and storytellers in their own right, embracing the proposition that *Content is King*, that the surest route to consumers' commercial attention is through creating high-quality, engaging content carefully crafted for the various environments - digital or analogue, social or solitary - which contemporary consumers inhabit.

Examples abound. Virgin Atlantic's 30-minute movie 'Departure Date' was shot at 35,000 feet to the tune of \$1m to promote a new LA route. Coca-Cola's 'Journey' website, is positioned as a "dynamic digital magazine" where people "will share their curiosity about the world, engage in stimulating debate, and find out what is at the core of Coke."

The growth of content marketing sits at the confluence of a number of trends including: *Resistance to Marketing*, which sees a power shift away from brands to consumers (and the corresponding response by brands to find new platforms and methods to share commercial messages); the exponential growth of *technologies and platforms* that allow greater brand immersion and engagement; *Accumulation of Social Capital*, as brands facilitate sharing and help consumers accrue valuable status.

A key component of content's success is its ability to be personalised and moulded to the exact shape of the individual consumer's requirements. And, for now at least, this tactic works – but how long will its star continue in the ascendant? When does quirky become annoying? When does just enough become *too much*? As content becomes king, cutting through the increasing levels of branded noise inside social spaces will also become progressively harder. It's here that many see Big Data making one of its major contributions, driving the personalisation of how campaigns are positioned and delivered; helping brands capitalise on so much of the flirtation that takes place on social platforms; potentially capturing even the most distant of contacts by popping up in the right place, using the right individual's information coupled with the right content.

Think about the mind-boggling array of commercial opportunities that could potentially open up when Google Glass goes mainstream – personalised adverts that pop up in our eye-line as we pass a store, bespoke promotions based on individual purchasing history, content delivered targeted to our health/ marital status/ friendships. Or what about the futuristic (and rather scary) prototype vibrating train window from BBDO/ Sky Deutschland, which transmits adverts directly into the brain as a commuter leans his head against it?

There is every sign that we consumers want all this: adverts which can remind us what we're interested in, platforms that make like-minded suggestions or remember our friends' recommendations, brands that know what we want before we do. Who isn't fed up of mass, well, everything?

But not so fast. There's a fine line. Consumers need to be willing to invite brands as a partner in their daily activities – and even exchange with brands to the point that they understand our very identities.

While the idea of actively trading personal data for benefits is interesting (36% say they see personal information as an asset to negotiate better prices and offers with companies, according to Future Foundation data), the concept is still pretty new and largely untested. This won't remain the case for long, though, and early enthusiasm could give way to overkill, especially when Big Data is handled badly - which, very often, it will be. This is an inevitable consequence of the expense involved in executing data-driven recommendations, content suggestions and rewards which are intuitive and satisfying.

So what's the long game? How will we want brands to make us feel special? How will we feel if every brand we speak to predicts every purchase we make and every video we'll ever want to watch? How much of an online relationship can brands really expect beyond a 'like' for a viral video here and a nod to a very tidy voucher deal there? We've come up with some trends and tips for a content driven future.

Simplify: Brand narrative doesn't have to be complicated. There's no need to scream from every YouTube channel/ Facebook page/ Pinterest board. In the 1920s, Ernest Hemingway famously bet that he could write a story in just six words. He won, there and then, by scribbling on the back of a napkin the words "*For sale: baby shoes. Never worn.*" Can brands keep things this simple?

Just because you can, doesn't mean you should: As more brands climb aboard the Big Data bandwagon, a degree of consumer fatigue seems guaranteed. There will also be very real concerns about the consumer's heightened sensitivity over privacy and about how to manage the risks inherent to this area. Totally personalised targeting can alienate as much as attract – brands must tread carefully in this sensitive arena. And not everything should be positioned as personalised content – the endlessly entertaining 'Condescending Corporate Brand' Facebook page showcases the very worst in brand engagement and demonstrates that there is nowhere to hide.

Creativity and Community: *Creative Consumption*, the desire to express ourselves and stand out creatively, is a growing trend - 57% of us now agree "it is important for me to be able to express my creativity", 10% more than two years ago. Allowing consumers to show their passions, skills, true colours will continue to be a very valuable route for brands *if done well*.

You're not the narrative: Conversation is the answer - it appeals to the human in all of us. Host it but don't dictate it; instead equip the consumer with the means to find their own identity through you.

Considered Curation: A much more thoughtful approach to selecting the platforms where we engage and share material. In these places and spaces, we won't need to warn about the risk of creating unwanted noise or of sharing content that carries little appeal for others.

Milk & Honey: Remember that Big Data is an endlessly contradictory affair. Increasingly, consumers expect brands to react proactively to their digital footsteps BUT also expect the right to be forgotten.

Collective Individualism: A concept which sits at the very heart of the Future Foundation's upcoming book, *The Big Lie*. We want to be individuals – but we want collectivism even more. The powerful truth is our need to be *not too* different, to uniquely belong. We want to stand up just enough to be counted, but only as part of our favourite crowd. And we like marketing for people that are just like us - where there are likes, affirmations or interesting brand connections that we can share with people who are like us.

This is going to go viral!

Stuart Aitken, Editorial Manager at the IAB UK, wonders whether in today's hyper-connected world content can be "organically" shared - or whether this sharing always has to be "engineered".

How often do we hear creative agencies promise that their campaign proposal for brand x, y and z has great "viral potential"? In today's hyper-connected world of course good old fashioned word of mouth is exponentially amplified by the digital marketer's dual holy grails - the "share" and "like" buttons.

As brands, publicists and even the great general public scramble for mass acceptance on digital channels, it's becoming increasingly difficult to distinguish "organic" success from "manufactured" success - so much so that it forces us to wonder if such distinctions actually truly matter any more. Is there such a thing as "organic" success? Has there ever been?

As data sources - made possible by analysing sharing behavioural patterns on social media for example - become ever richer by the day, so a raft of new companies are developing ever advanced techniques to predict what the audience wants, thus unlocking enormous opportunities for brands keen to achieve a viral hit.

So what does this all mean?

There are some very strong examples of "organic" success. If you can tap into a meme - or, even better, somehow predict it - then the internet is your oyster. Think for example of Charlie Bit My Finger, until recently the most watched clip on YouTube (with 530,000,000+ views on one post alone, not counting others who reposted) with apparently no social seeding/distribution of any kind.

What is really interesting though is when we examine the story behind the video which finally knocked Charlie off his perch last year. Psy's Gangnam Style is thought by many to be the great example of how an artist (or brand) can be an "organic" viral hit almost overnight. The story of the South Korean star's rise to fame is well known and always seemed too good to be true - primarily because it was.

Intrigued by the phenomenon, digital agency [10 Yetis carried out an extensive review](#) to assess how the success was achieved. While they discovered that there was no false manipulation of traffic volumes or over-reliance on celebrity endorsements, the report attributed the success of the campaign to an incredibly well structured and expertly executed campaign by Psy's record label YG Entertainment.

So is this really a surprise? And is it disappointing? After all, at what point in history did people ever just create something without looking to shout about it, cross their fingers and hope that the idea would fly? What we're seeing is the application of concepts that are as old as the idea of PR itself - but amplified through new, hugely impactful media.

The great challenge in all of this, is that despite the growth of digital media and despite the abundance of consumer data available, it is still not easy to create something that will go viral. Creating - or even capitalising on - a meme is not easy. Creativity is and continues to be absolutely vital to the whole process. Yes there are certain viral markers - think funny pets / babies / goofy dancing for example - but there is no guaranteed recipe. This is why creatives are still vital, and why we see agencies like Rubber Republic who have created the job title "Meme Weaver" for some of the people who write their video scripts.

It's very rare then that something truly "organic" becomes a viral success. But then what does "organic" really mean in this context? As a species we have always been fascinated by stories and been eager to be led by gifted story-tellers. The same is true now.

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Returning to music, we saw a great example of this earlier this year in the digital campaign for the launch of Boards of Canada's new album Tomorrow's Harvest. In the run up to the launch, a wonderfully complex multimedia treasure hunt was created [leading fans down various shadowy internet worm holes](#), all designed to create buzz. The campaign led fans on a merry dance which they willingly and gleefully participated in. As such it showed that if you can craft an ingenious campaign that will engage your audience then they will follow you.

Applying this to the brand advertising space, we can conclude then that if a brand can truly engage, entertain and captivate its audience, they will follow them. The story may be manufactured by a creative genius with a strange job title like "Meme Weaver", but is that a problem? Is it not more important that we are entertained? And besides, aren't the best stories meticulously crafted works of fiction?

The future of creativity

Chris Buckley, Director of Social Engagement at TMW, wonders how addressable and targeted content will impact the way brands and their agencies create content.

Creating is what brands do best, but how they do it is being challenged by the changing way in which they can target and deliver advertising messages. The spaces they create for and within are increasingly diverse and fragmented, and the way people consume a brand's content continues to evolve through convergence and technical innovation.

In this modern communication environment, a consistent advertising message is less important to success with a consumer or customer than delivering a coherent and engaging brand idea. For a brand to be agile in the way it creates content and truly adapt to opportunities whether paid or earned the brand, and its agencies, have to leverage a very different set of skills.

This a world where targeting is defined to the smallest addressable audience (increasingly the individual rather than the household), where the context of media consumption defines the message, and achieving predictable and measurable results is both the first and last consideration of the advertiser.

Why is it a challenge?

From an audience perspective, consumption isn't static. It's diverse, multi-channel, multi-device and enabled by continuous connectivity. Brand content is always available to be viewed and shared. From a consumption point of view, everything the brand does has the potential to become content and the timeliness of advertising becomes a key planning decision.

Four significant considerations for content creators

1) Omni-channel creation

Creative departments have to re-profile their team towards those that can create for all experiences and contexts. Understanding the delivery platform for the content is of equal importance to understanding the audience behaviour.

2) Who creates is changing

The media owner, the technology platform and the audience are creating ideas. Creatives, whether in-house or agency side, have to create in partnership with others. This loss of creative control can be hard to accept.

3) Content consumption

Non-linear consumer journeys are not a new concept, but the idea of creating once to be published in multiple places is still in its infancy for many content creators. For editorial based content, adaptive content creation principles will impact the way content is structured, tagged and distributed in the future.

4) Data in content creation

Trends analysis and the ability to undertake behavioural segmentation will become more than a targeting exercise, it will shape every aspect of a campaign. Data planning is elevated as a key activity across the entirety of the campaign. Optimisation becomes integral to success.

What does this mean to content creators?

1. Ideas will come from more than one place – hard to accept for some.

2. Creative has to be driven by data – earlier in the ideation process and throughout the campaign.
3. Traditional roles are being challenged and new ones created – the rise of the innovation director and creative technologist
4. Innovation matters more than before – the ability to innovate or recognise innovation can be costly for content teams.
5. Campaigns have to be coherent across different formats and executions – with multiple iterations being viewed, campaigns must have a strong central idea.
6. The audience's expectations drive delivery – accessible and responsive content must be available on the audience's terms and device.
7. Talent attraction and management becomes a greater issue – can the leaders of creative output effectively manage 'non-creative' resource?
8. How success is viewed needs to evolve – from campaign performance to how creativity is measured within the industry.

The second screen

Tim Elkington, Director of Research & Strategy at the IAB UK, explores what may be possible if we are able to create content on screens that can work in conjunction with first screen content.

Advertisers are increasingly using second screening and social media to encourage engagement with advertising content, with a great recent example being [Mercedes' TV campaign for the new A-Class](#) where Twitter users were able to determine the outcome of the ad's story line. So if smartphones and tablets can be used to determine the outcome of TV advertising, then why not content?

Of course the Mercedes example didn't happen in real time, but was based on Twitter activity over a couple of days, allowing the advertiser plenty of time to select the outcome decided on by users. It's this real time interaction that's currently the major barrier in terms of technology - although this is changing. The new HTC One for example includes the functionality of a [remote control](#) and TV companion apps, such as [Zeebox](#), allowing people to interact with each other around TV content in real time while show specific apps, like [Million Pound Drop](#), mean that you can play along with live TV content at home.

It's not just the functionality of the smartphones and tablets that needs to develop before real time interaction is possible. Currently, TV advertising content is broadcast in a linear, homogeneous way with all households who are watching the same channel seeing the same content and the same advertising. Sky's launch of [AdSmart](#) will change this, allowing houses in different geographical areas to be shown different advertisements, tailored to their different interests or preferences.

So imagine if the technological barriers to real time interaction were removed. Suddenly smart phones would be able to interact with televisions and TV content could be targeted and tailored in real time. All of a sudden the TV looks a lot like a games console and the days of the passive, lean back medium are over. Imagine even using existing smartphone functionality like the accelerometer or the augmented reality capabilities (as demonstrated through [blippar](#)) to determine the end of TV shows like Sherlock, Luther or Broadchurch. If you can determine whether a character lives or dies through using the accelerometer, for example to drive the getaway car, then imagine the activity on social media as different actions and outcomes are compared.

On a slightly more pedestrian level, what if you could use augmented reality to focus on certain areas of the screen or aspects of a programme that particularly interested you - for example on a gardening or design show - and use your companion device to view exclusive additional content?

As with so many developments, having the right data in place will be key to enabling the type of innovations described above. But if preferences can be set before content is watched and matched with classic web browsing and demographic data, then the capabilities of tailoring content according to preferences and behaviour, in addition to real time actions, means that we could see a time when an almost limitless number of variations of the same core content are being enjoyed by different people at the same time.

This vision of the future might seem a bit hectic; an extreme version of convergence where the TV has become both the home PC and the games console and the once passive audience is now given the responsibility of determining the outcome of major TV shows (all after a hard day's work!) But there's no doubt that given the right technological developments and balance in terms of deployment, the chance to transform second screening from a passive commentary based type activity to an active lean forward experience looks exciting.

What does success look like?

Alison Sprague, Partner at CEG Europe, outlines some key metrics for success when creating addressable and targeted content.

Content is king. And increasingly it's platform agnostic. Consider the audience, visualise the idea, create the concept and then decide the medium for release – audio, video, or print; traditional or new; physical or virtual. And then adapt – by medium, by structure (short-form, medium or long-form) and by audience – from mass to niche to the individual.

This contrasts significantly to the old world. Take film for example: film makers sweat their asset over time – initially at the cinema, then DVD (hard copy, soft copy, rental and owned), VOD, pay TV (both linear channels and SVOD) and finally FTA TV. The content is the same throughout, targeted to mass audiences, but the delivery channel and release date varies. Of course this model is increasingly seen as archaic and subject to significant piracy to plug the timing gaps in the release windows - note of course that the British movie by Ben Wheatley, A Field in England, was recently released at the cinema, on DVD and on FTA TV on the same day.

Jump online and we have a world of contrast. For the audience it is non-linear, immediate and, potentially (and acutely), addressable, targeted and personalised. For the publisher, technology enables near-immediate short-form, medium and long-form versions of content. Add in elements of dynamism and the content can be developed into a series. One-to-one cookie matching and it can be a series just for you, or for me. If advertising can be targeted to different individuals, then why can't content?

Arguably all advertising is content. Prime examples include: Guinness; Sony Bravia's rubber balls and paint; the Chanel No 5 Christmas film; BA's 'Take A Plane Down Your Street' which demonstrates how a mass TV ad has been personalised (to postcode level) online; and Dove's Sketches which other brands shared – an atypical metric, but surely one that is indicative of success. Brands have become content owners. But are there analogies with traditional content exploitation? (Not really.) And can you measure success? (Yes, but it's tricky.)

The bottom line is that today creatives are faced with a plethora of choices in the new and continually evolving digital world. The box below indicates some of the (not mutually-exclusive and certainly non-linear) options for consideration.

CONCEPT							
FORMAT	STRUCTURE	EPISODE	MEDIUM	DEVICE	DYNAMICS	COMMS	AUDIENCE
Audio	Short-form	One-off	Traditional	TV Radio	Static	Push (broadcast/ email/text)	Mass
Video	Medium-form	N-parter	Online: (website/ social media/ own channel/ YouTube)	Press Billboard Netbook	Dynamic (journey- based) UGC?	Pull (search/ opt-in)	Niche Individual
Print	Long-form	Series		Ipad Smartphone Smart TV			

Over-zealous creativity may develop at the expense of effective content, so the metrics guys should be involved in the process early on. Assuming the final deliverable is engaging, entertaining and relevant, the content will be successful. But how is success measured, and is it cost effective? Surely in practice it would not be cost effective to develop a mini-series for one person.

In practice measurement challenges are no different to measuring the effects of 'standard' advertising. Metrics are available but they need to be pieced together to paint a picture of the overall effect. And differing forms of content may not be readily compared: specific metrics may be required. Indeed, one particular challenge is how best to benchmark different content properties. If one idea can be repurposed by medium and device but scores well on one medium alone, is that superior to a bespoke piece developed for one medium alone and gets the same score? Probably not. Thus finding the balance between expected costs and effectiveness will be critical.

Marketers appear not to agree on a specific set of metrics to judge success but there are some broad hints available. These include:

- Consider the objectives of the content strategy. What do you want the consumer to do? Can you agree KPIs at the start?
- Most commentators agree that there are at least four categories of metrics to consider and, importantly, one from each category needs to be selected:
 - Consumption
 - Sharing
 - Leads
 - Sales
- Take time – the metrics are not like overnight ratings on TV. It will take time to build up a picture and there is a significant learning process to go through. Tracking is important. Think six months rather than six days.

Metric interpretation is also important – can you demonstrate a real change in consumer behaviour and that it is directly attributable to the all-important content?

The creative and the technology appear to be ahead; measurement lags behind. Google Analytics, monitoring Facebook, buying sophisticated CRM systems, building a plain old Excel model and surveying consumers may all have a part to play. The measuring of success is a bit like creating the content itself – crafting a credible narrative around a set of metrics. Trial and error will reveal what works and what doesn't. But it can't be done overnight.