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Technologies

Future in Focus

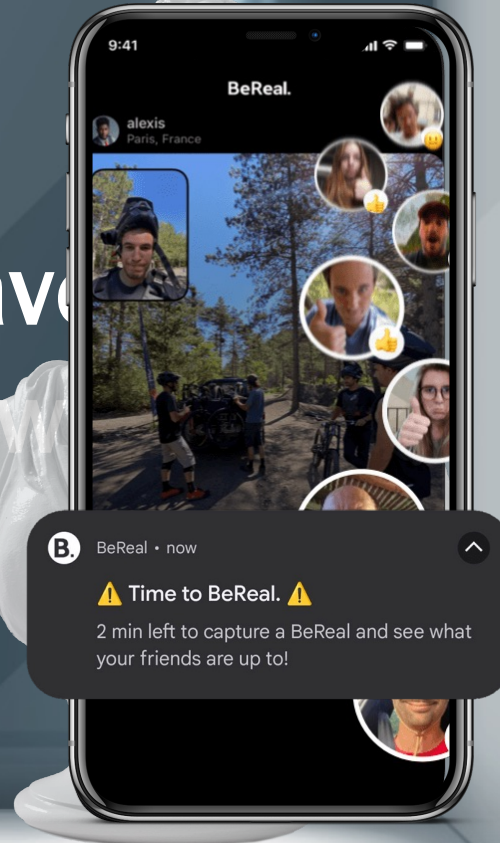
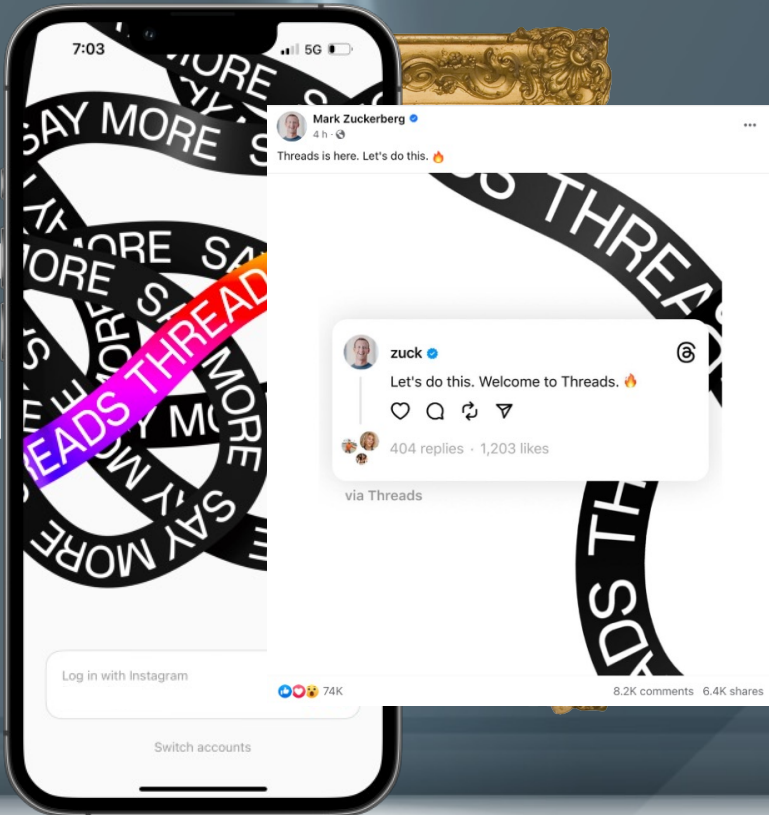
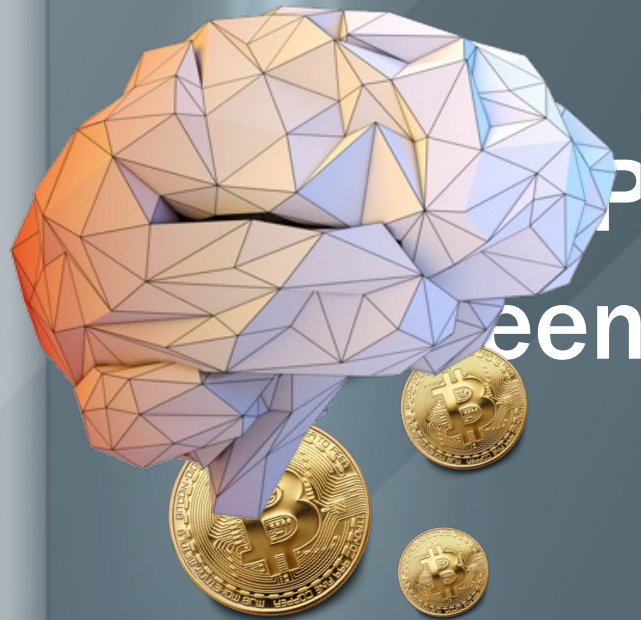
A Look Ahead at Digital Advertising in 2024



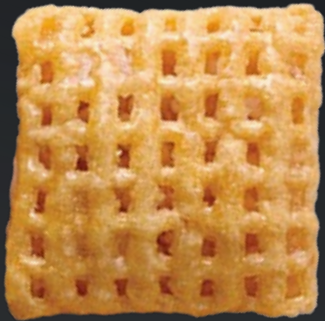
Noor Naseer

VP, Media Innovations + Technology

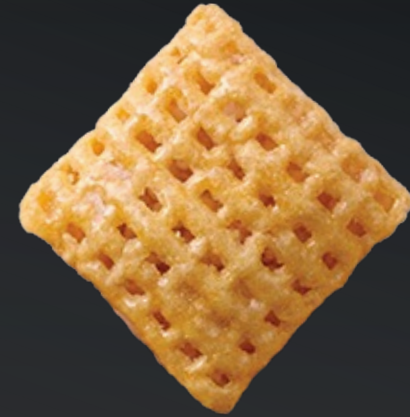
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Technologies



Society Likes New Things



Old
Boring!



New
Exciting!

Let's Step Back.



Trends for the Future in Focus



Inventory
Cleanup



Seeking
Attention



Election
Investment

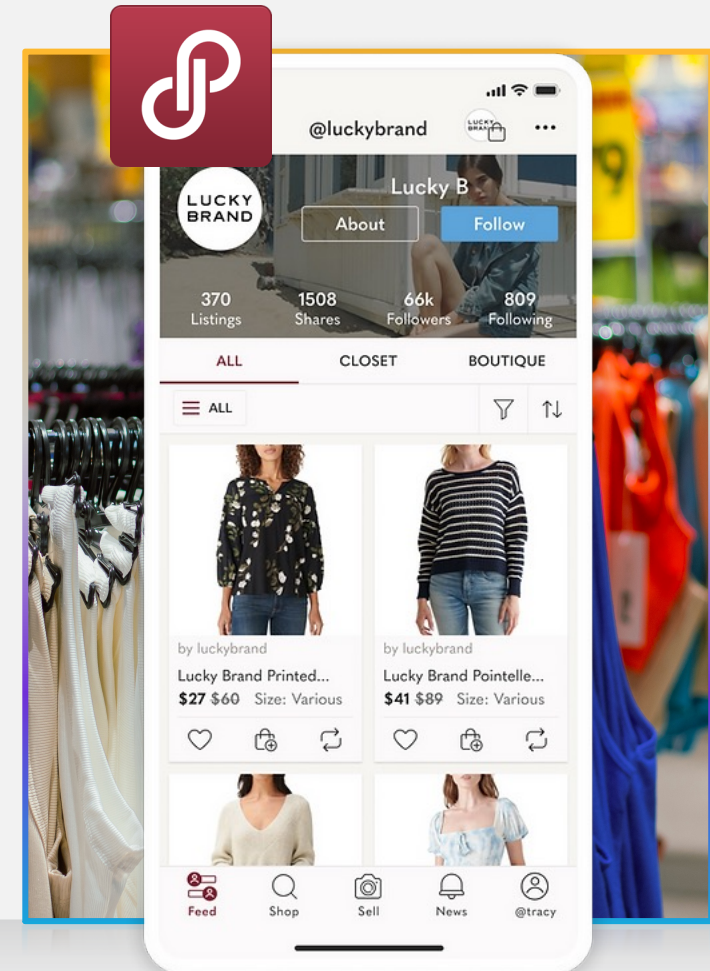


Riding
Hype Cycles

Inventory Cleanup



We've Turned a Critical Eye Toward Waste



Ad Tech is Confronting its Own Waste Problem



Ad Fraud



Duplicate Bidding



Made for Advertising



23%

of ad spend
is wasted





Acknowledgement
of the problem

Accountability
called for

Apathy
sets in

IT'S TIME TO REPRIORITIZE

VOLUME

VALUE

VALUE

VOLUME

- Protects brand reputation + investments
- Transparency improves media analysis
- Industry moves toward higher standards
- Offers privacy protection
- Ensures efficiencies are realized
> both costs + emissions

The background features a dark blue gradient with several overlapping circles in shades of brown, blue, and purple. Some of these circles contain gear patterns. At the bottom, there are two silhouettes of people standing on small white oval platforms, one on the left and one on the right, appearing to be in conversation or presenting. The overall aesthetic is modern and professional.

A CENTRAL FINDING BETWEEN A 2016 STUDY AND THE 2023 STUDY REMAINED THE SAME:

Advertisers Must Take **Active Stewardship** of Their Paid Media

How to Tidy Up Your Media Buys



Manage brand suitability, intentional media buying

Removing low quality inventory (MFAs)

Prioritize PMP + PG buys



Apply bid shading



Transact on quality metrics (attention)



Evaluate log level data



Seeking Attention



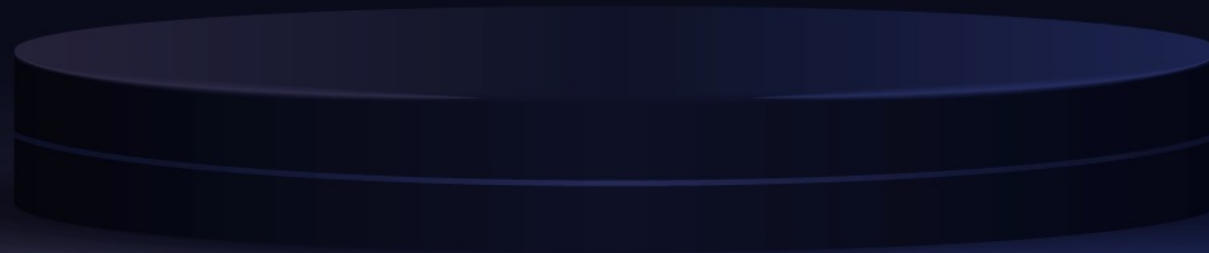
SINCE THIS PRESENTATION BEGAN, HAVE YOU:

A: Checked Email

B: Looked at Your Phone

C: Responded to a Ping

D: All of the Above



Focused Attention is Declining.



Passive Attention is Thriving.

We scroll 300 ft per day

Or, 21 miles per year



CONDITIONED
FOR DISTRACTION

Ad clutter adds to our attention deficit

SO MANY SHOWS.
Streaming here for \$5.99/mo.
START YOUR FREE TRIAL
Hulu (ad-supported) plan only. Terms apply. **hulu**

\$699
AVERAGE ANNUAL SAVINGS
for drivers who switch and save
Get a Quote
PROGRESSIVE

\$500
on select Sony OLED and big screen 4K TVs.
Shop Now
SONY

\$1 ANY SIZE SOFT DRINK
i'm lovin' it'
Coca-Cola

Join us at Dreamforce | SEPT. 25-28 | SAN FRANCISCO
Join us at Dreamforce
LEARN MORE

Beauty Deals
Discover exclusive offers
SEPHORA

DECEMBER TO REMEMBER SALES EVENT
FIND YOUR LEXUS
LEXUS

Must-have school gear, A+ prices!
Shop now
Walmart

TOSS THE MOSS, KEEP THE SAVINGS.
More saving. More doing.
THE HOME DEPOT

MAKE PERFECT PASTA IN 60 SECONDS
Banilla Ready Pasta

Microsoft
Access your world, virtually anywhere with Office 365
Save, edit, and share files across multiple devices

CHASE
New Chase checking customers enjoy
\$200
when you open a Chase Total Checking® account and

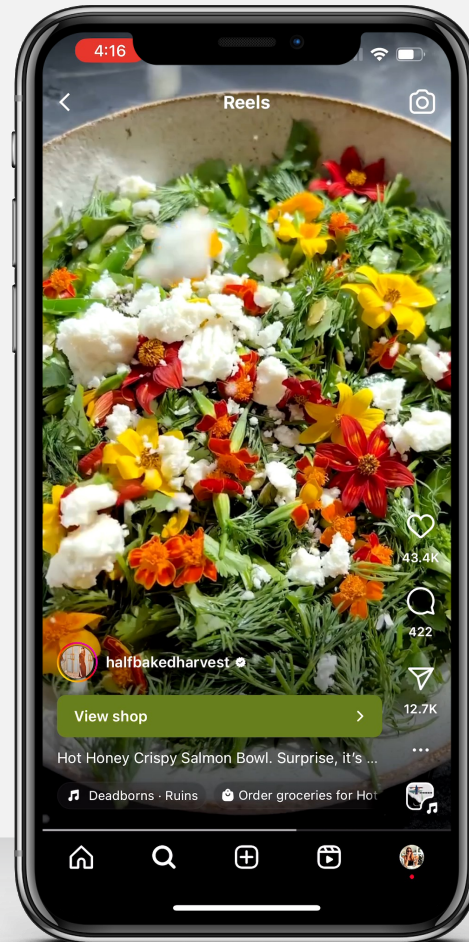
We're Having Trouble Capturing Sustained Attention

MLB PITCH TIMER

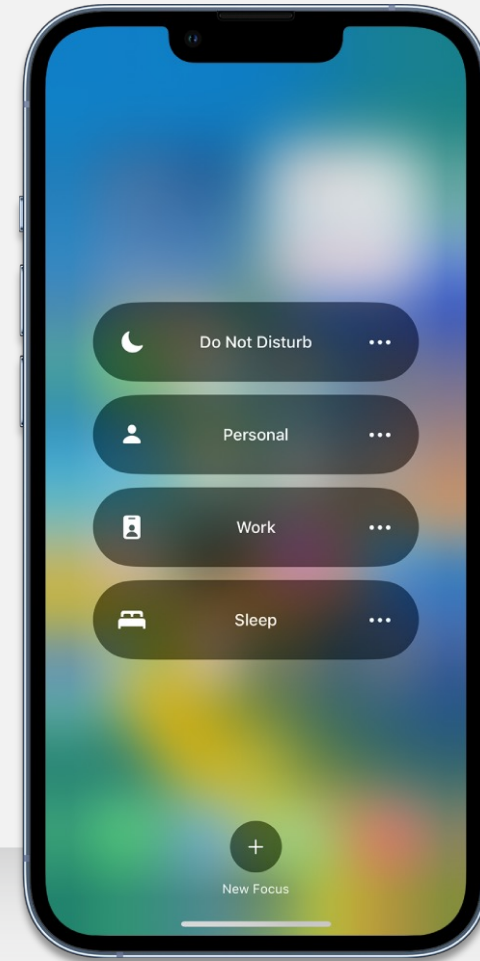
↓ 26 Minute Game
Time Reduction



SNACKABLE VIDEO

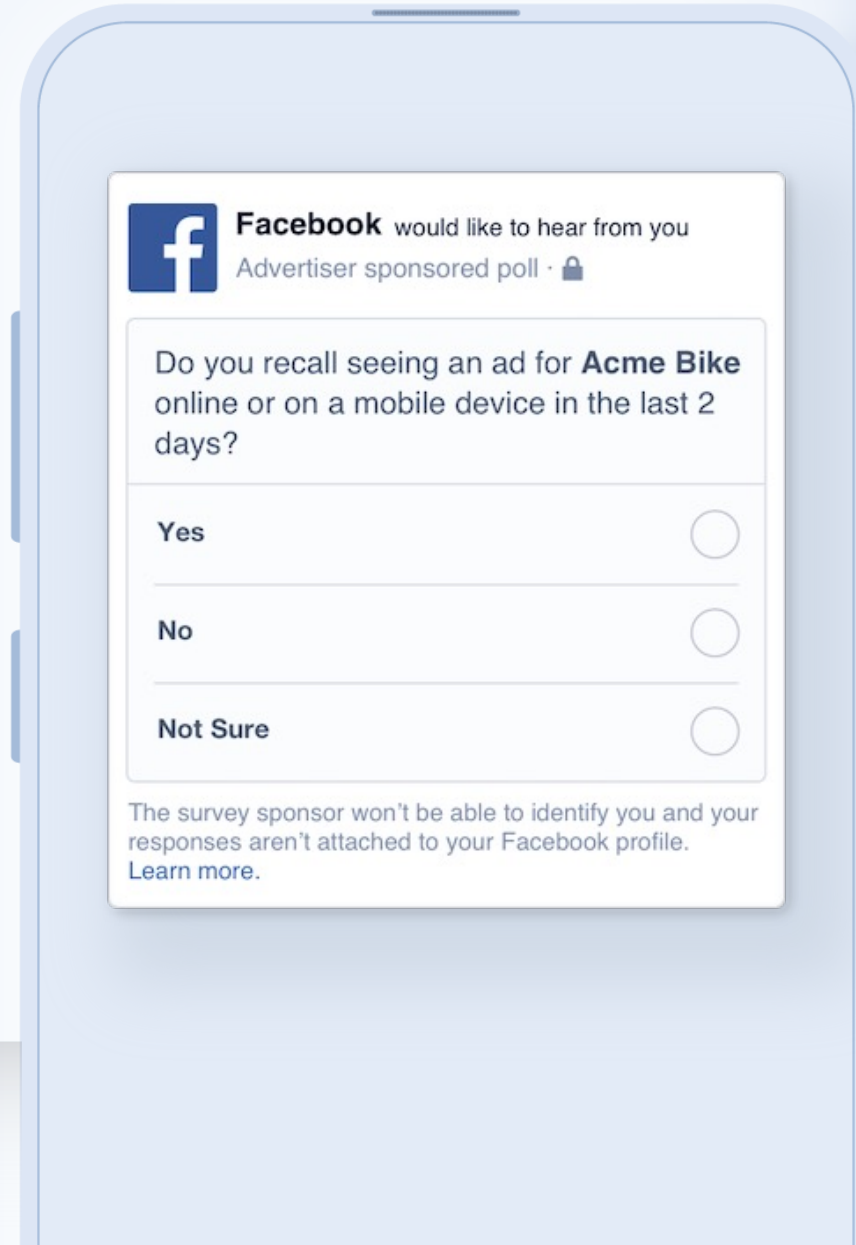


DO NOT DISTURB



WHY MAKE SUCH AN EFFORT TO
CAPTURE ATTENTION?

Attention Matters for Memorability.



Distraction Devalues An Impression

IMPRESSION



VIEWABILITY

OUTCOME



**Viewability is potential,
Attention is proven.**

Four-Fifths
of viewable impressions
aren't seen

Media Attention Without Creative Attention is Lost Attention

MEDIA ATTENTION

Plan + transact toward an attentive audience

CREATIVE ATTENTION

Compel that audience to act

PERFORMANCE OUTCOMES

Brand Lift + Recall
Sales, Conversions

5% attention lift drove a **40%** increase in brand awareness

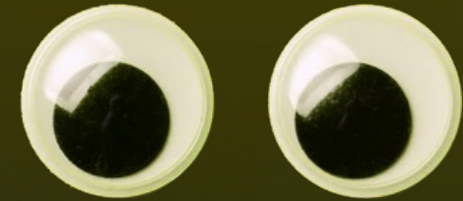
Putting Attention to Work in Your Paid Media

Activation

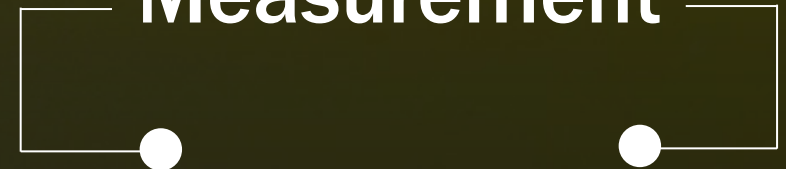


PRE-BID
SEGMENTS

PRIVATE
MARKETPLACE
DEALS



Measurement



CUSTOM
BIDDING
ALGORITHMS

PIXEL-BASED
VERIFICATION

TAKEAWAYS

Getting the Most Out of Attention



Understand how attention is scored while standardization is lacking



Request attention score benchmarks to establish performance expectations



Pair attention buying with measurement to maximize investments





Election Investment

We Exist in a Contention Climate

67%

Agree we're more divided than ever

65%

Say the lack of civility and mutual respect is the worst they've ever seen

Spiraling Toward Tumultuousness



2012

ROMNEY VS OBAMA

Heavy TV Spend

Emergence of Social Media

Appeals to Anger, Negativity



2016

CLINTON VS TRUMP

TV Still Dominates

Cambridge Analytica

“Fake News” First Heard



2020

TRUMP VS BIDEN

Digital Led Election

Record-Breaking Spend

Culture Wars

Information is Consumed in Unmoderated Environments

130%

increase in political
misinformation from
Q1 2023 to Q2 2023

 NewsGuard

 nobl

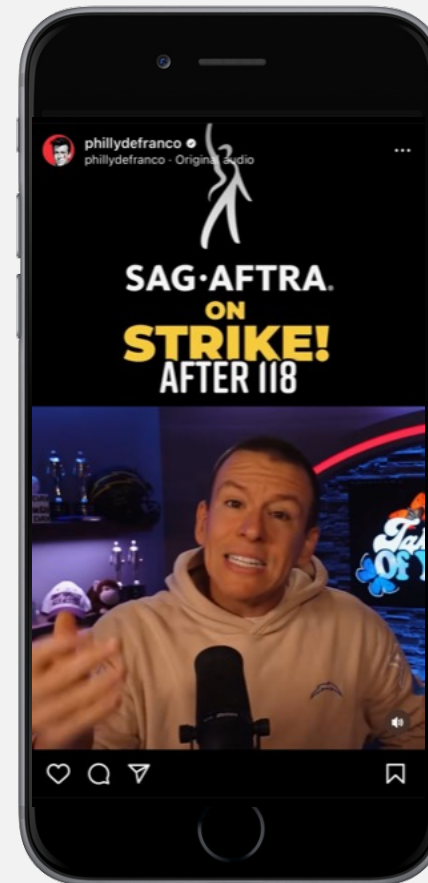
 FACTMATA

Younger Generations Seek News From Other Sources

53%

of Americans have an unfavorable opinion of the U.S. news media

NEW WAYS TO GET THE NEWS



Political Spend Makes TV a Tight Squeeze

\$11B

projected 2024
political ad spend



How Advertisers Can Get Away From the Crowds

GO WHERE THEY CAN'T

Consider paid media spaces that don't allow political ads (Netflix, Disney+, TikTok)

GO WHERE THEY DON'T

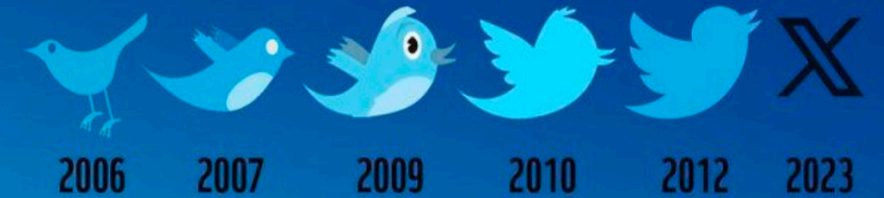
Invest in channels that are de-prioritized by political advertisers (audio, DOOH)

PLAN TO COMPROMISE

Adjust budget expectations and in-market timing to align with political activity

Advertisers Can Provide Relief From Political Peril

The 2023 Edelman Trust Barometer found US businesses were **more trusted** than government or media



PROTECT OUR WILDLIFE, BEFORE IT'S TOO LATE.



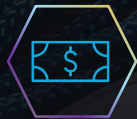
Prepare for Any Scenario in the Political Media Landscape



Adjust your media strategy to work with election activity



Plan ahead to secure competitive inventory



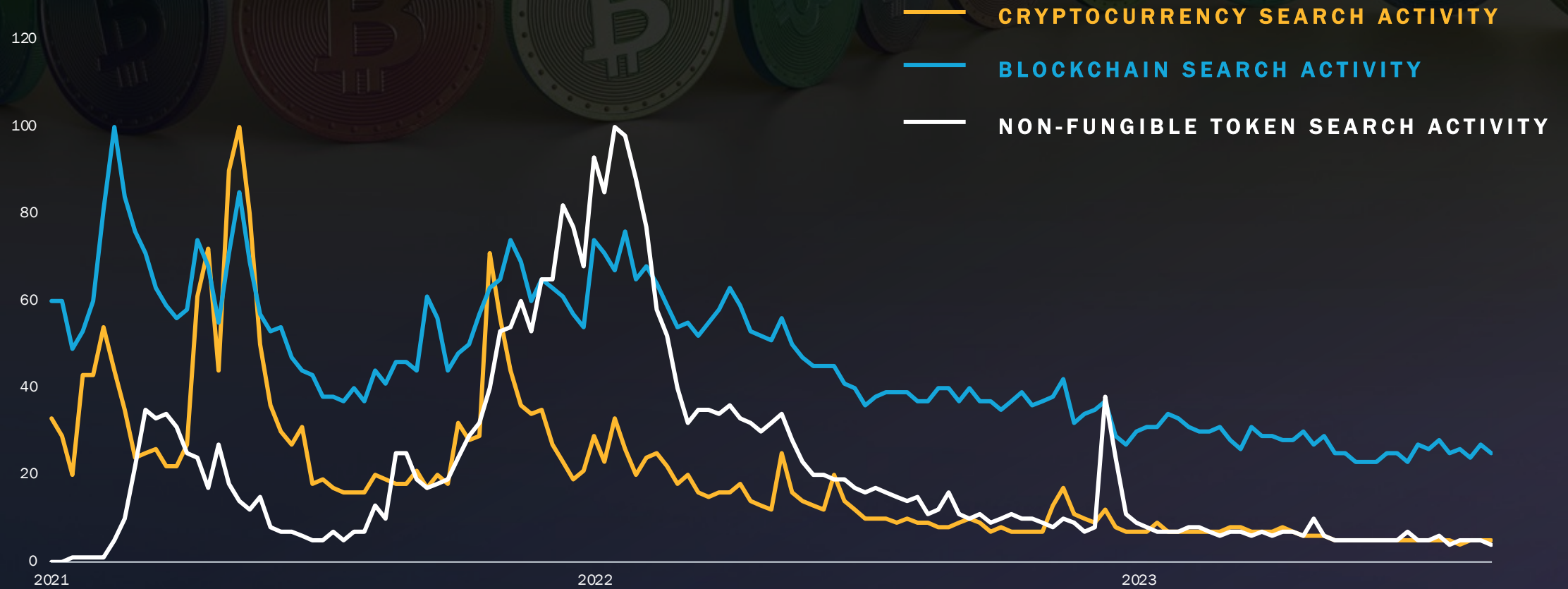
Solidify your brand's stance on political participation



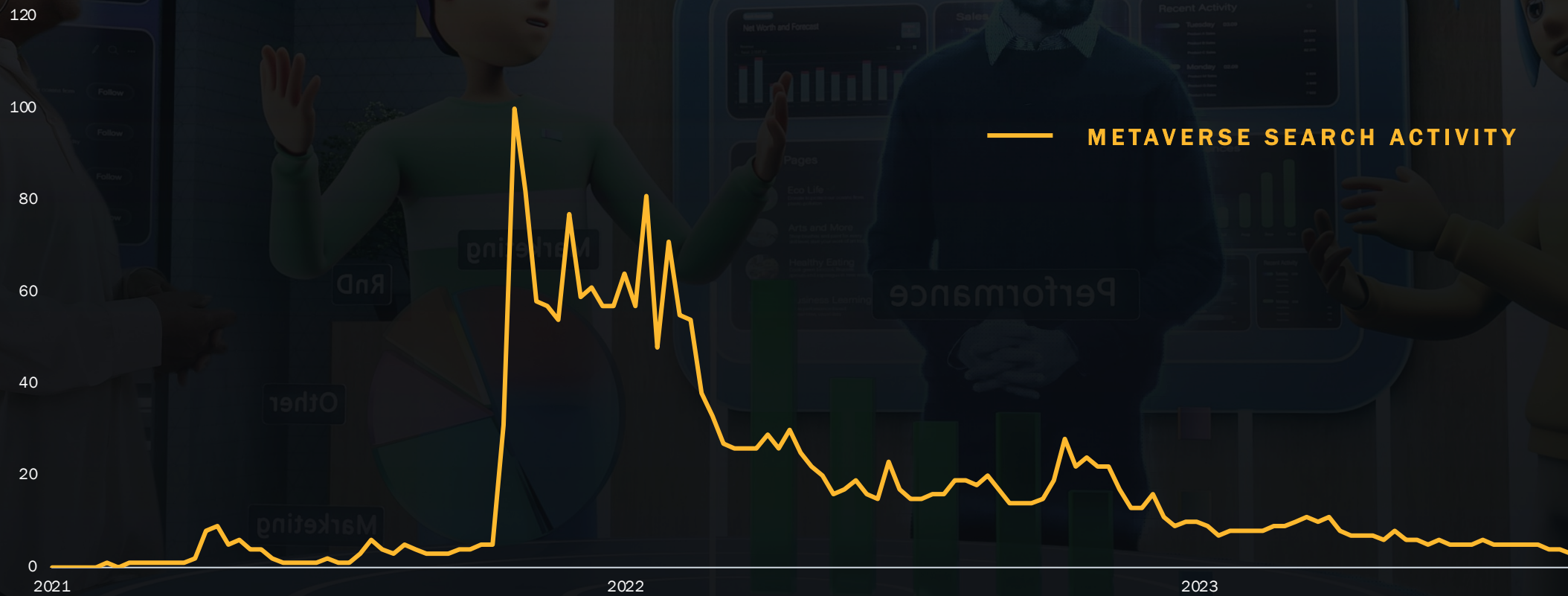
Riding Hype Cycles



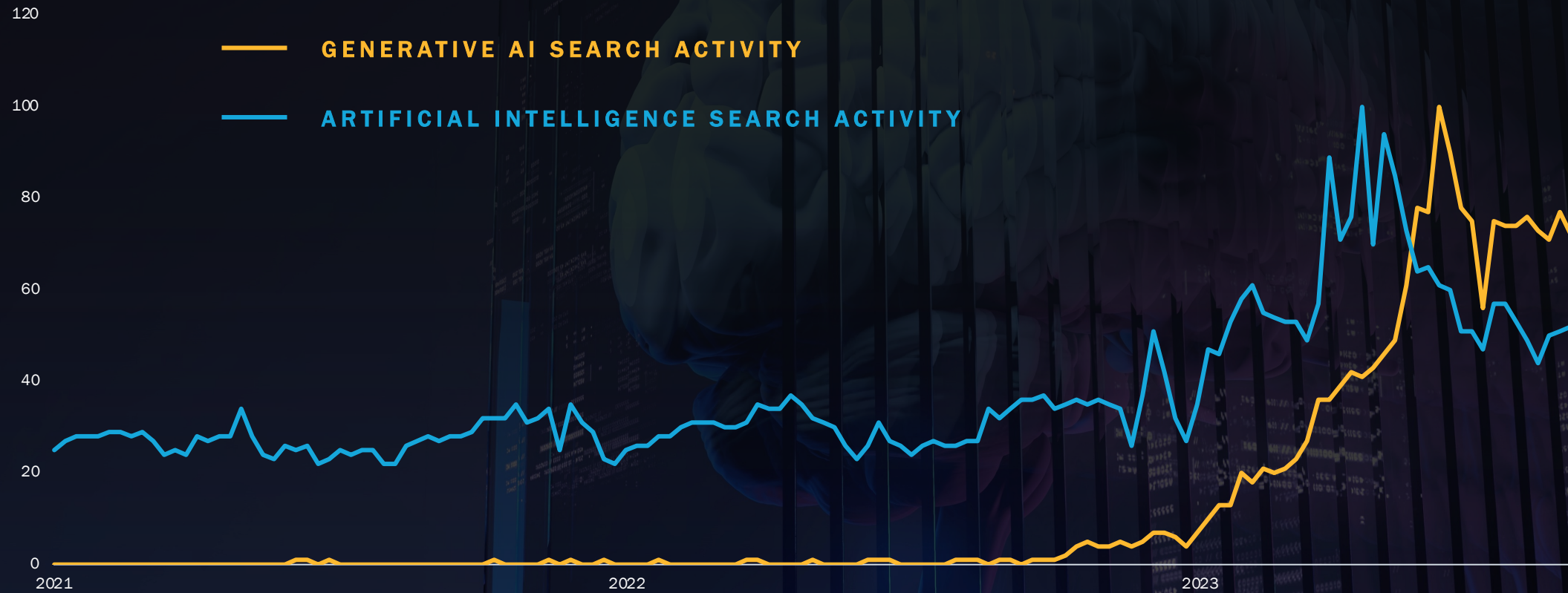
Hype Happens Abruptly



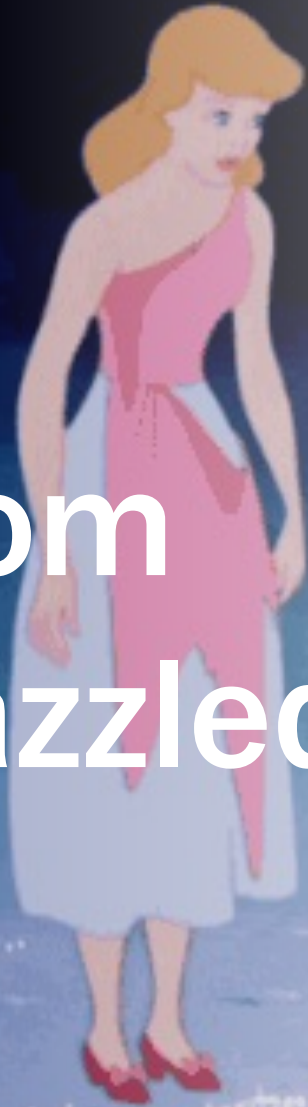
Hype Happens Abruptly



Hype Happens Abruptly



From Dazzled



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Technology

Facebook changes name to Meta as it refocuses on virtual reality

Forbes

New Era Of Generative AI Finally Delivers On Promise

TE

Crypto

NFT market OpenSea hits \$1.5 billion valuation



To Disillusioned

REUTERS®

World ▾ Business ▾ Markets ▾ Sustainability ▾ More ▾



NFT sales plunge in Q3, down by 60% from Q2

VentureBeat

Gartner Hype Cycle places generative AI on the 'Peak of Inflated Expectations'

☰ CBS NEWS



MONEYWATCH >

Meta's value has plunged by \$700 billion. Wall Street calls it a "train wreck."

WHY DO WE BUY INTO HYPE?

FOOMMO
We Don't Want to Be Left Behind

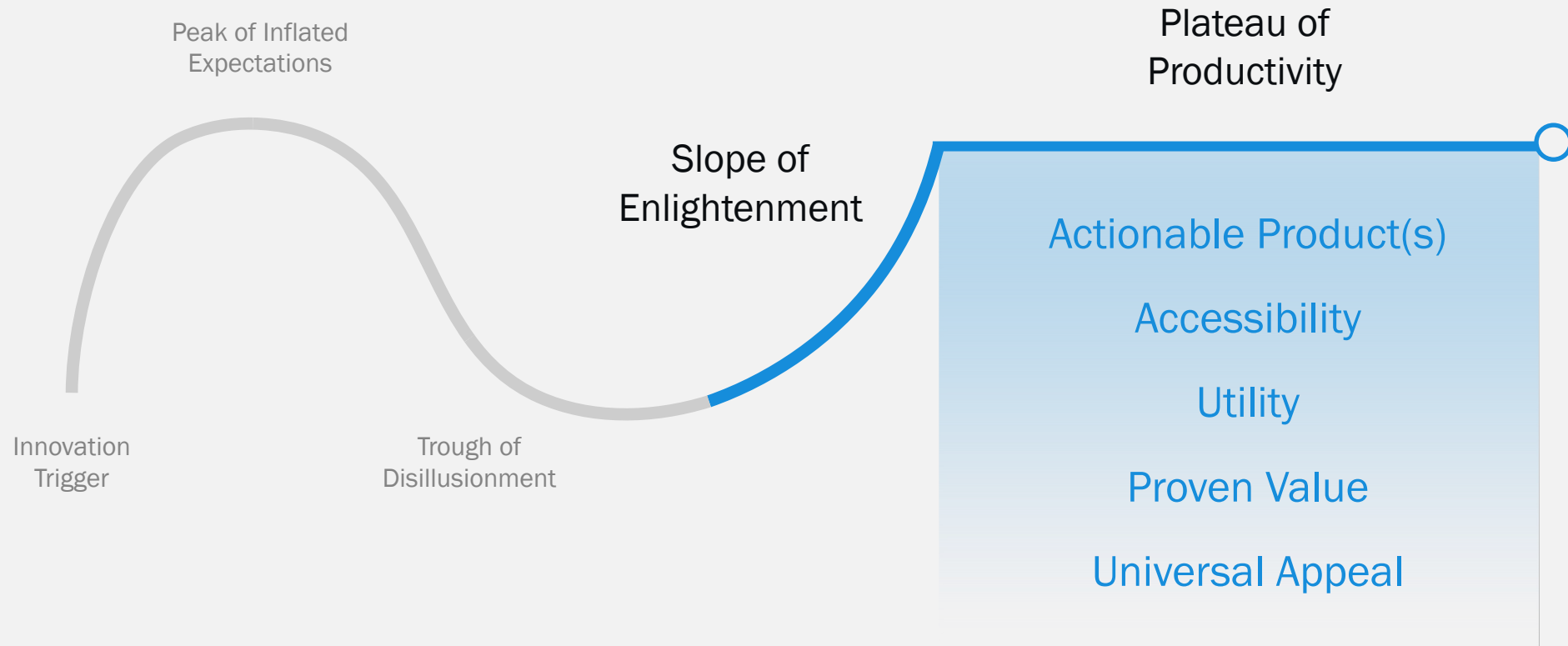
Should You **Believe the Hype?**



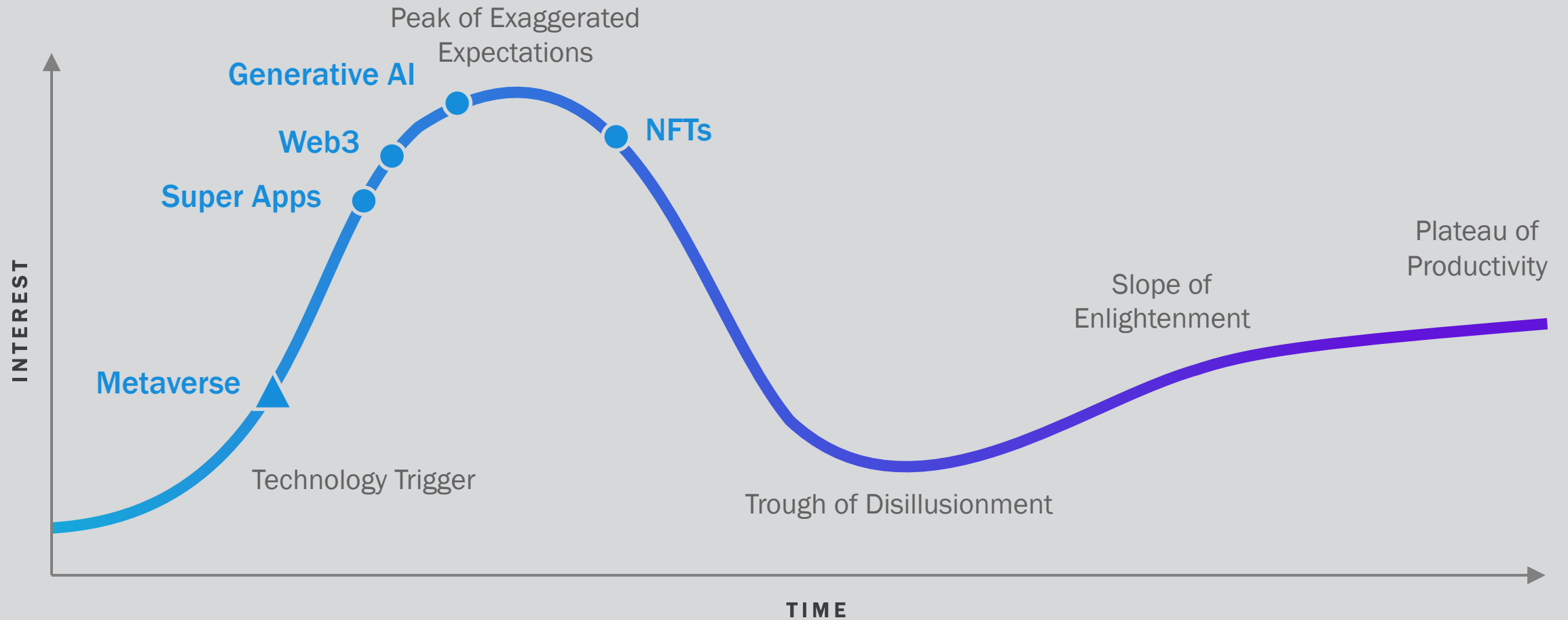
Hype Disrupts, Then Dies Down



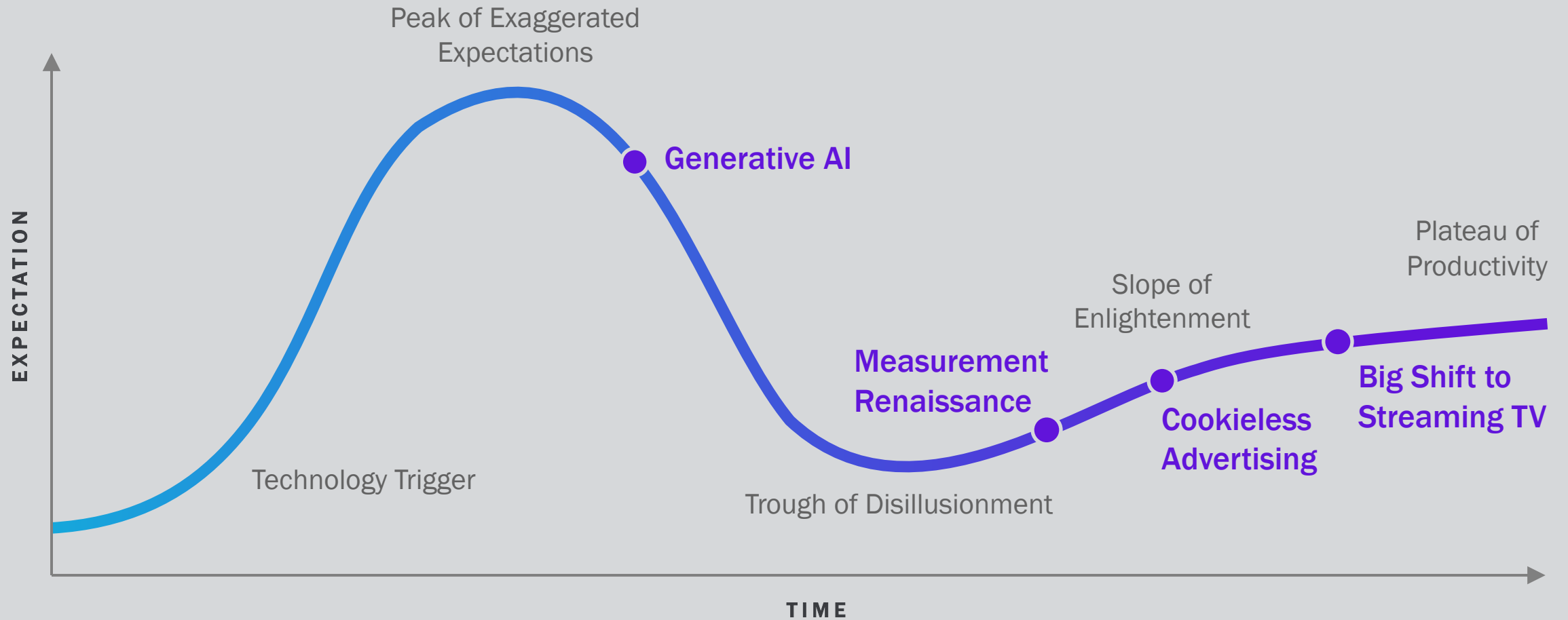
Innovation is Built in Iterations



Recent Hype Cycle



The Hype Cycle for Digital Media



Value Determines Staying Power



2007



2023



SOCIAL

Self-transcendence



PERSONAL

Self-actualization
Affiliation/belonging



EMOTIONAL

Rewards me
Fun/entertainment
Provides access
Design/aesthetics



FUNCTIONAL

Connects
Simplifies
Saves time
Quality
Informs

What Advertisers Should Ask

- ⦿ Is there a product available for use?
- ⦿ What is the required investment for that product or set of products?
- ⦿ What utility does this provide for *my brand/client needs*?
- ⦿ How does this emerging opportunity support our business objectives?
- ⦿ What triggered the hype cycle? What preceded it?
- ⦿ Is this a smart advertising strategy for us to explore?

Are there other, more mature tech advancements that are worth investing in instead?

Getting the Future in Focus



Future in Focus Takeaways

Provide Meaningful
Perspective on
What's New

Vague familiarity isn't deep understanding

Don't be intimidated by what the rest of the industry is doing

Evaluate where an opportunity sits in the broader advertising ecosystem

Assess value for
your brand goals

Assess potential desired outcomes

Make investments wisely based on what's most applicable
and accessible for your resources and goals

Be ok with "passing" on an opportunity until it's more valuable

Distinguish between
what's necessary now vs
potential for the future

Executing a solution isn't always the next step



Q&A

basis.com/trends



- Travel and Tourism
- Healthcare and Pharmaceutical
- Retail & E-commerce
- Restaurants & Dining
- Financial Services
- CPG
- Automotive
- Political
- Cannabis
- B2B
- Education