



Advertising Services

Market Research and Statistical Services

These data-driven, digitally-focussed industries serve to provide strategies and services that enable businesses to keep pace with consumer demand for personalised brand interactions and service provision.

Industry Developments and Workforce Issues

Industry Trends 2019. IbisWorld projects Australia's advertising industry revenue to grow by an annualised 3.3% in the five years through 2018-19 due to a greater number of clients spending more on a range of advertising, particularly online advertising.¹ However, changes in media consumption and technology will see greater integration across different advertising media. Global trends anticipate a significant decrease in internet marketing (predominantly driven by small, local businesses) and a continued surge in use of mobile platforms, online videos and social media channels.² Shorter attention spans are driving snack ads (short videos less than 10 seconds long) while dominance of mobile phone use to access social media is shifting focus on mobile marketing. Increased application is anticipated for live streaming (real time interactions), Chatbots (customer service and engagement) and content marketing to influencers (user-endorsed products and services).³ A move towards greater personalisation and automation will increase use of artificial intelligence (AI) and target audiences will receive personalised messaging and content by means of smart speaker and voice assisted devices.⁴ Market research and statistical services industry revenue is also expected to grow nationally at an annualised 3.0% over the five years through 2018-19. Companies in this space will need to continue broadening their data collection methods, including online, SMS and social media. As advancements in technology continue to enhance smartphone capability, mobile media research will become increasingly important to reach audiences and remain competitive.⁵

Technology and Gig Economy. Automation, machine learning, Internet of Things, Chatbots, voice activation and augmented reality all play a key and growing role in marketing and the collection and analysis of customer data.⁶ With basic digital marketing tools being offered free of charge (such as Google's free introductory websites) and strong, price competitive offshore gig workers using platforms such as Freelance Digital Marketing Specialists for Hire Online (Fiverr), WA-based marketing firms need to offer specialised services and support to remain viable. Core digital design skills are still a cause for concern in the industry in terms of seeing a return on marketing investment. Templates and other pre-built, un-customised solutions are still being sold and utilised by businesses, particularly those with limited budgets.

Changing Media Consumption. Growing sophistication in media consumption, changes in consumer expectation and increasing consumer choice are determining how brands connect with audiences in a meaningful way and the role technologies such as AI, digitisation and voice play in targeting and personalising communication and messaging. Integrated, Omni-channel strategies are the mainstay of the industry, linking traditional marketing tools, such as radio and television to online touch points with a growing demand for personalised, real-time brand interaction. As digital and social channels become

¹ IBISWorld, Advertising Agencies - Australia Market Research Report, February 2019.

² Marketing Magazine, [Online advertising to exceed 50% of global ad spend for the first time ever](#), 10 July 2019.

³ Marketing Magazine, [Online video will take over like never before](#), 3 December 2018.

⁴ Marketing Magazine, [11 Trends That Will Shape Marketing 2019](#), 15 January 2019.

⁵ IBISWorld, *Market Research and Statistical Services - Australia Market Research Report*, May 2019.

⁶ Association for Data-driven Marketing and Advertising, [Personalising the customer journey. How new technologies are redefining CX](#) (whitepaper), 13 June 2018.



more nuanced and complex, media consumption connects behavioural change with marketing activity.⁷ In line with this, marketers increasingly rely on understanding human behaviour and data for effective content marketing and development of meaningful relationships.⁸ A recent article points to AI and neuromarketing being the fastest growing skills in terms of expected importance.⁹ The Association for Data-Driven Marketing and Advertising (ADMA) has introduced behavioural science into their course offerings for marketers to help them *understand the effects of psychological, cognitive, emotional, cultural and social factors on consumer decision-making and how that might impact their own marketing strategies*.¹⁰

Digital Infrastructure. While advancements in technology, automation, applications and social media continue to enhance industry capability, connection speeds and poor internet reliability are hampering access, particularly in regional WA. As use of digital and social channels to market and engage brands with current and prospective consumers continue to evolve it is important digital infrastructure is able to meet the growing demand on access, reliability and speed.

Trust, Privacy and Data. With the increasing need for data to meet customer expectations for personalised, real-time interactions with brands, privacy remains a key focus, in particular the protection of IP, insights and personal consumer information. It is imperative for brands that they establish trust with consumers in order for them to feel comfortable providing the information and data required for analysis and strategic planning.

Industry Workforce Priorities

Skills in Demand. A recent Hays¹¹ skills report points to a growing hybrid set of skills for marketers due to increasingly more complex campaigns, roll-out of marketing technology, digital trends, cloud computing and automated AI customer relationship management platforms. Today's marketers need to create innovative content that connects brands with audiences in meaningful ways across different platforms and this is growing the demand for content management experts and experience in content writing and video production. Not surprisingly, customer centric digital marketers continue to be sought after. Reportedly, consumer choice and online transparency is driving an emphasis on retention marketing, loyalty marketing and customer-centric digital marketing. Digital experts in social and digital media, search engine optimisation/marketing and data analysis are also seeing growing demand in a push for more sophisticated customer profiling, impact measurement and informed decision making.

Adjunct Operational Skills. Customer retention, lead generation and customer lifetime value are key areas of focus for marketing professionals. The ability to understand key business needs and indicators are increasingly important for marketing professionals. Similarly, given the customer-centricity of the industry, a strong understanding of customer/user experience and a service-orientation remain critical. It is also important that customers are clear about the benefits associated with the provision of personal data, closely linked to the establishment and maintenance of brand/organisational trust. Alongside core marketing and technical, adjunct skills are often sought around project management, technology, analytics, team building, leadership and strategic planning. The ability to function in a diverse team is important as is the ability to work with and effectively support other business units within an organisation.

Professional Development. Standard skill sets are becoming highly complex with artificial intelligence and machine learning, data and analytics, marketing technology, and web and app development. The complexity of roles and skills requirements are clear based on the increasing need for influencer and

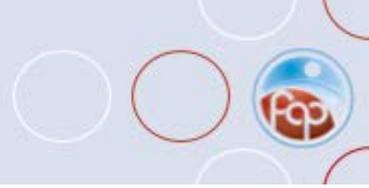
⁷ Marketing Magazine, [Organisation-wide change agents: Megan Brownlow on today's biggest marketing challenges](#), 1 April 2019.

⁸ Association for Data-driven Marketing and Advertising, [The next steps in content marketing – Report](#), 16 November 2017.

⁹ Marketing Magazine, [Marketing in 2025 across ANZ: how our priorities, skills and tech will change](#), 30 January 2019.

¹⁰ Association for Data-driven Marketing and Advertising, [ADMA introduces behavioural science as part of new world-class education solution for marketers](#), 14 June 2019.

¹¹ Hays, [Hotspots of skills in demand – Marketing and Digital](#).



experiential marketing, neuromarketing and buyer behaviour experts. On-going professional development and training is seen as important in order to stay abreast of new technologies, evolve capabilities to match changing roles and facilitate ways of working that maximise return on investment.

Small Business Capability. With many small companies vying for contracts, the competitive environment requires more than quality service delivery. Organisations need to stay connected with their clients in order to maintain communication and be responsive to their needs. Social networking and social media marketing are effective ways to promote and differentiate a business, inform clients and connect to new growth opportunities. Service providers need to foster interactive relationships with existing clients and utilise breadth of communication platforms to market themselves. Knowledge of global and regional trends as well as local factors are important if local businesses are to take full advantage of the most appropriate suite of marketing strategies and tools for their products and services. Lack of marketing expertise among the micro-business can be a barrier to growth.