

KEY TAKEAWAYS:

FEEDBACK FROM AD EXECS ON ADVERTISING BUDGETS AND SPEND ALLOCATION TO SOCIAL MEDIA IMPROVED.

INSTAGRAM PERFORMED WELL IN OUR SURVEY AND IS BECOMING INCREASINGLY IMPORTANT TO CLIENTS WHO ADVERTISE WITH IT.

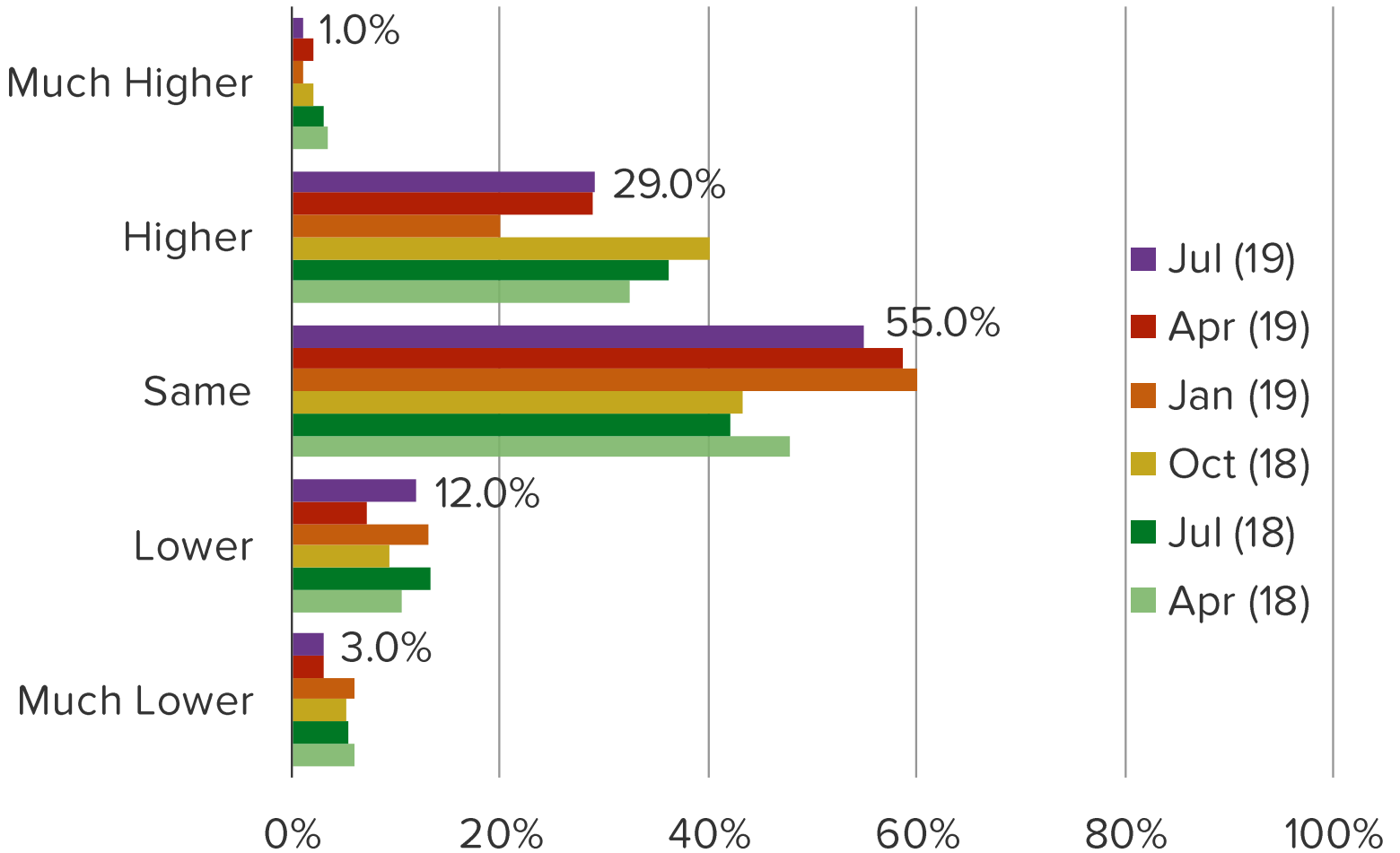
25-30% OF AD EXECS FEEL SNAPCHAT FEATURES LIKE GAMES, ANDROID APP REFRESH, AND GENDER FILTERS MAKE IT A MORE ATTRACTIVE AVENUE FOR ADVERTISEMENT.

AWARENESS OF GDPR INCREASED, BUT A DECLINING PERCENTAGE FEEL IT WILL IMPACT QUALITY OR QUANTITY OF TARGETED DATA.

# AD SPEND HEALTH

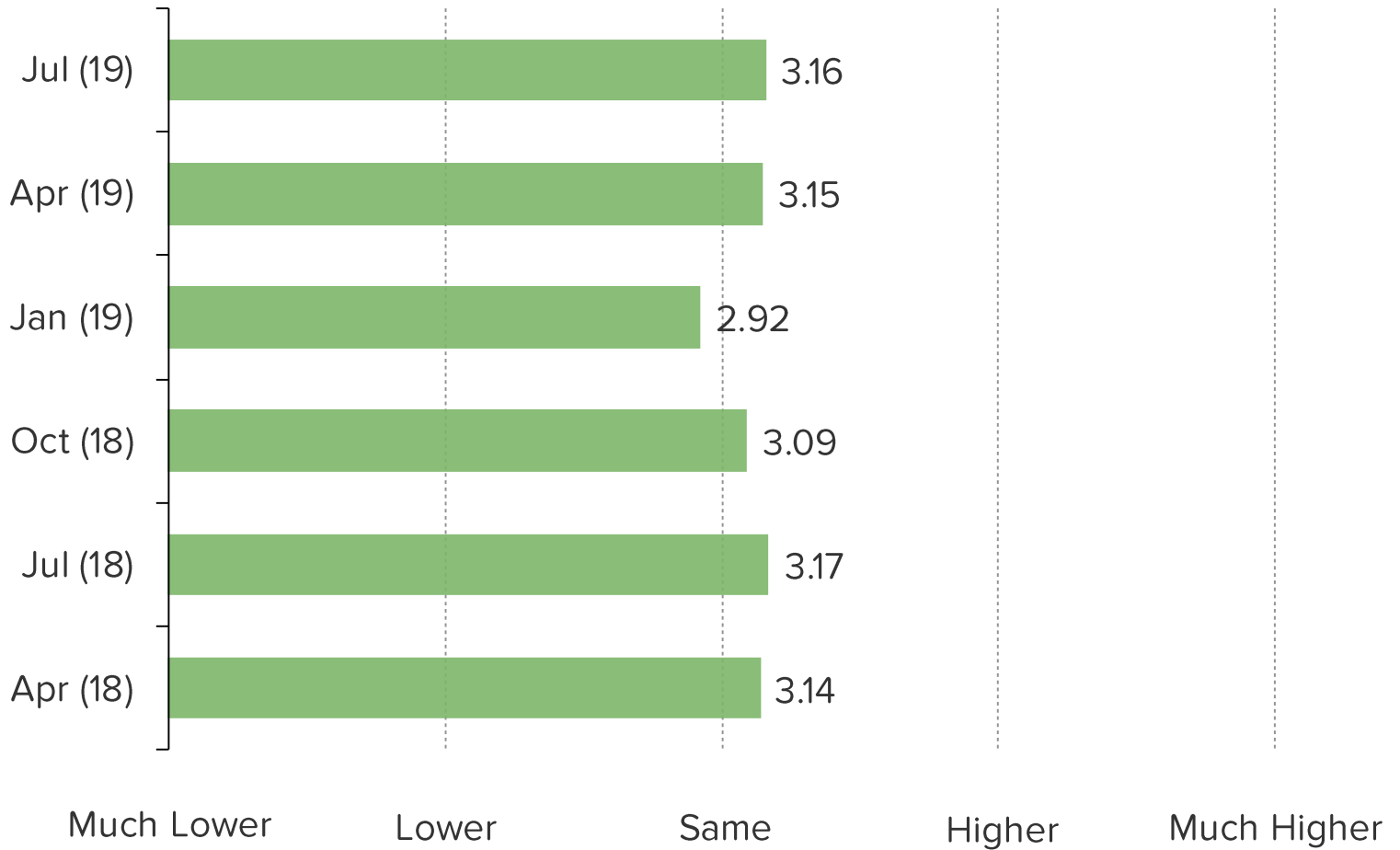
**PLEASE DESCRIBE ADVERTISING BUDGETS COMPARED TO THE SAME TIME ONE YEAR AGO?**

This question was posed to the target audience.



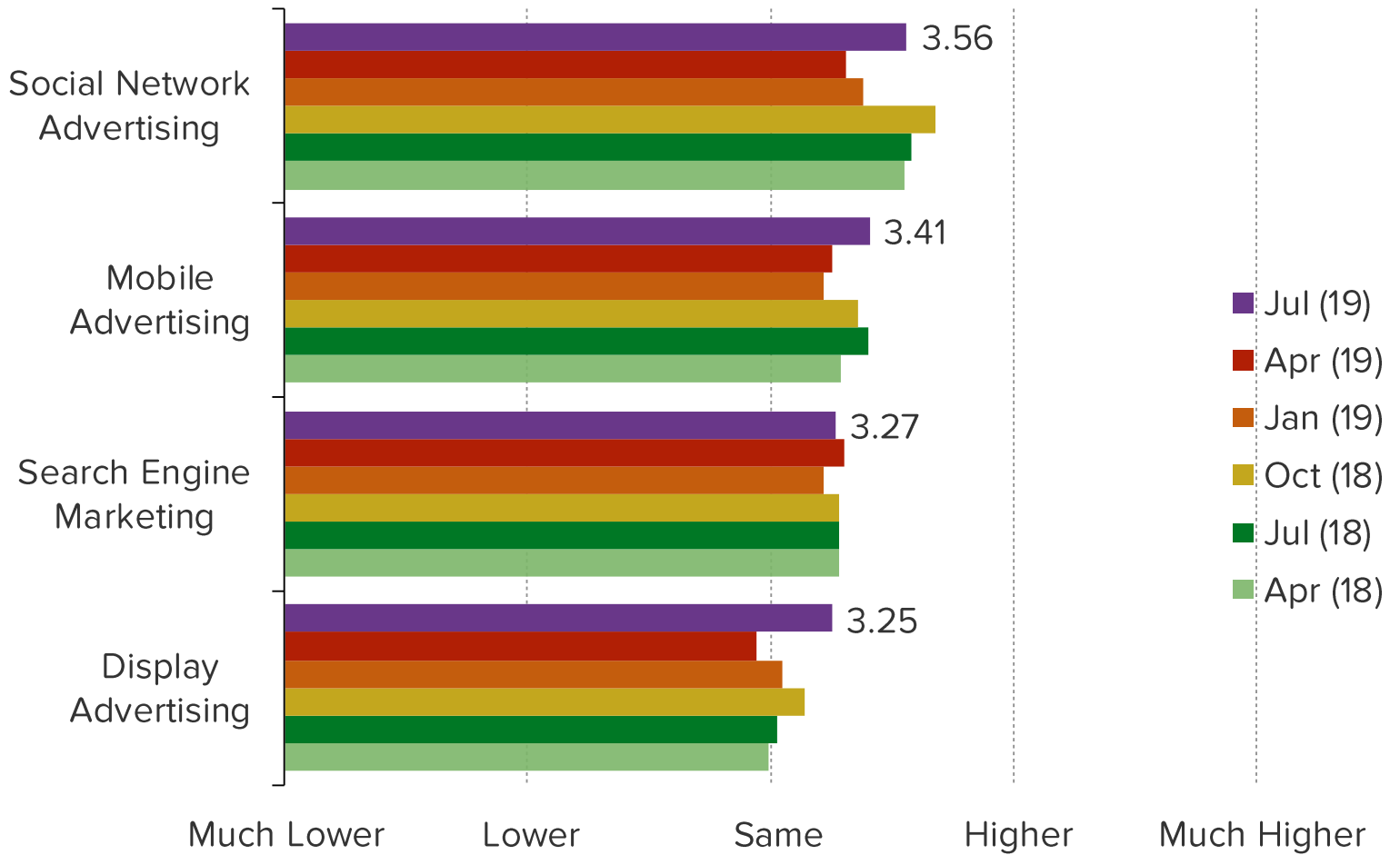
**PLEASE DESCRIBE YOUR CLIENT'S ADVERTISING BUDGETS OVERALL COMPARED TO LAST QUARTER.**

This question was posed to the target audience.



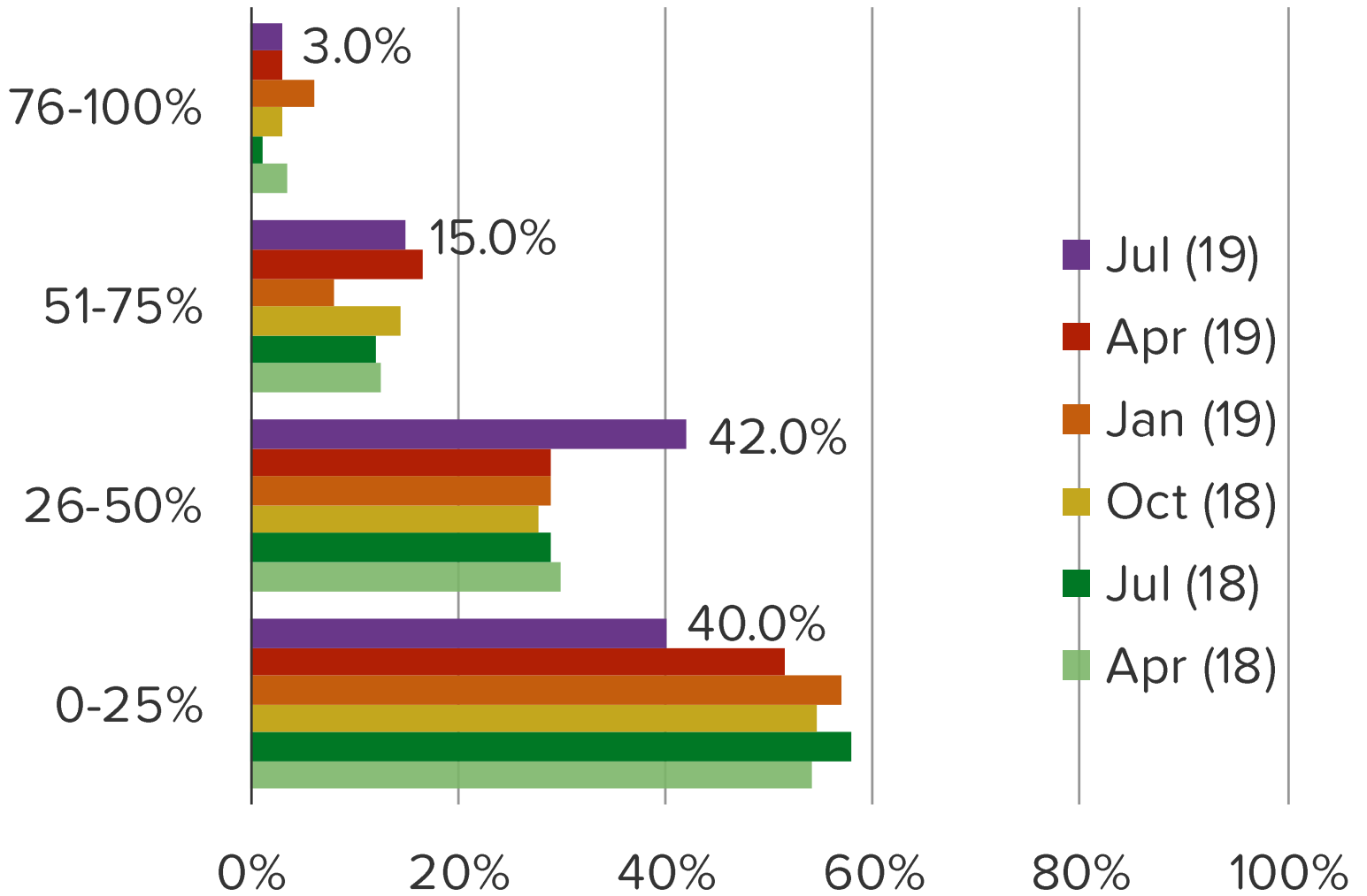
**PLEASE COMPARE SPENDING ON EACH OF THE FOLLOWING ADVERTISING METHODS COMPARED TO ONE YEAR AGO.**

This question was posed to the target audience.



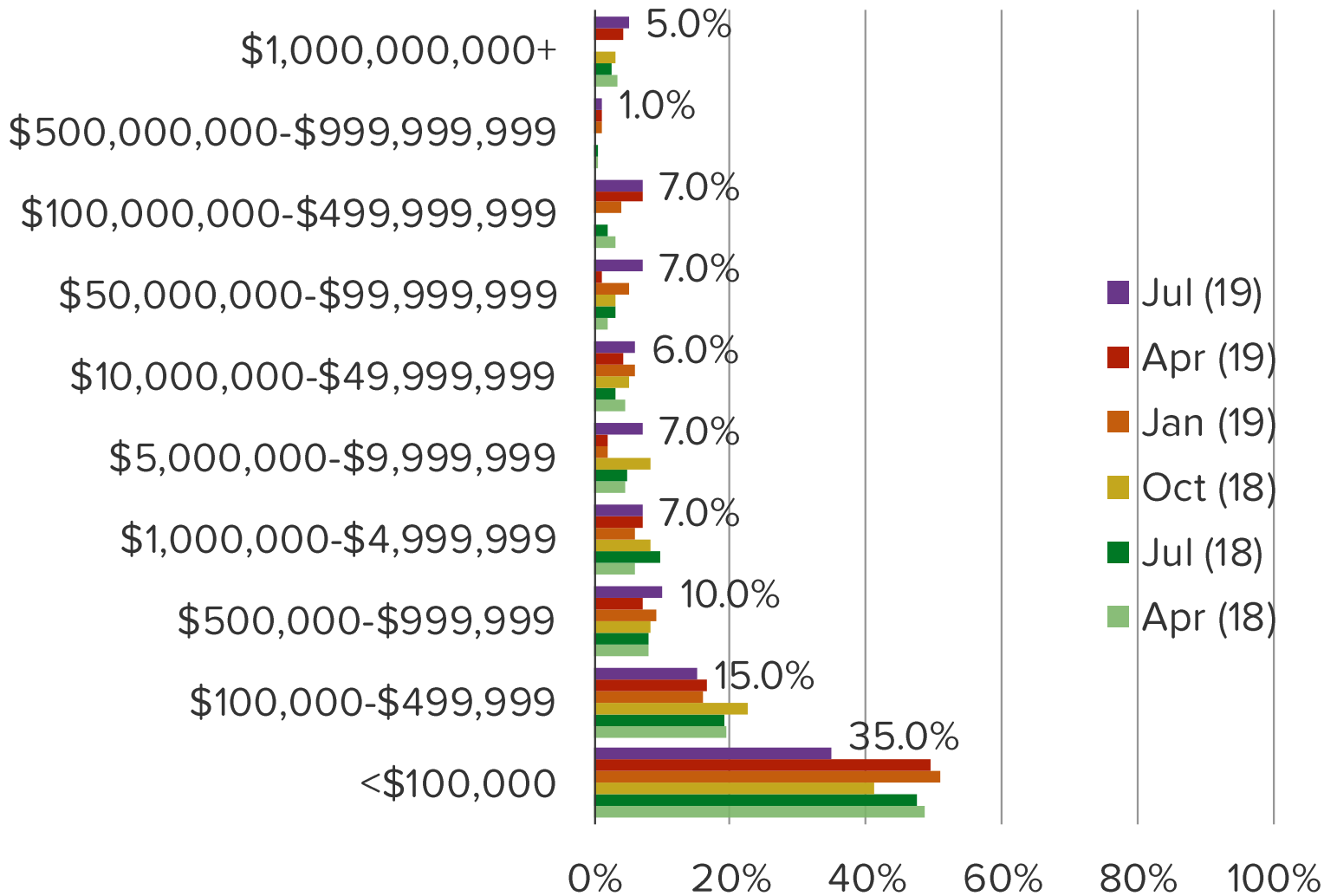
**WHAT PERCENTAGE OF YOUR CLIENT'S ADVERTISING BUDGET IS CURRENTLY DEDICATED TO SOCIAL MEDIA ADVERTISING?**

This question was posed to the target audience.



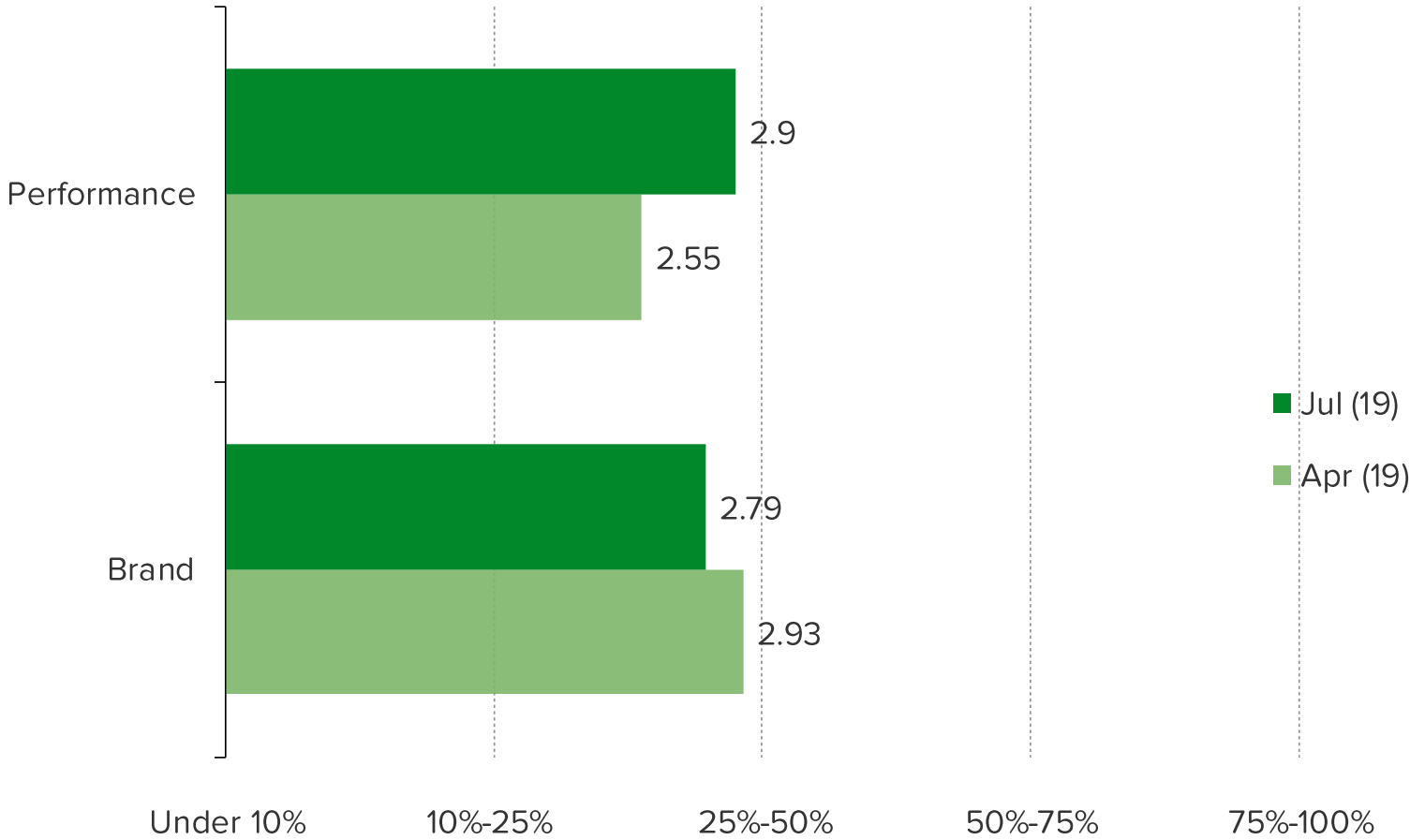
**PLEASE PROVIDE AN ESTIMATE OF THE AMOUNT THAT ALL OF YOUR CLIENTS SPEND ON SOCIAL MEDIA / INTERNET ADVERTISING ON AN ANNUAL BASIS.**

This question was posed to the target audience.

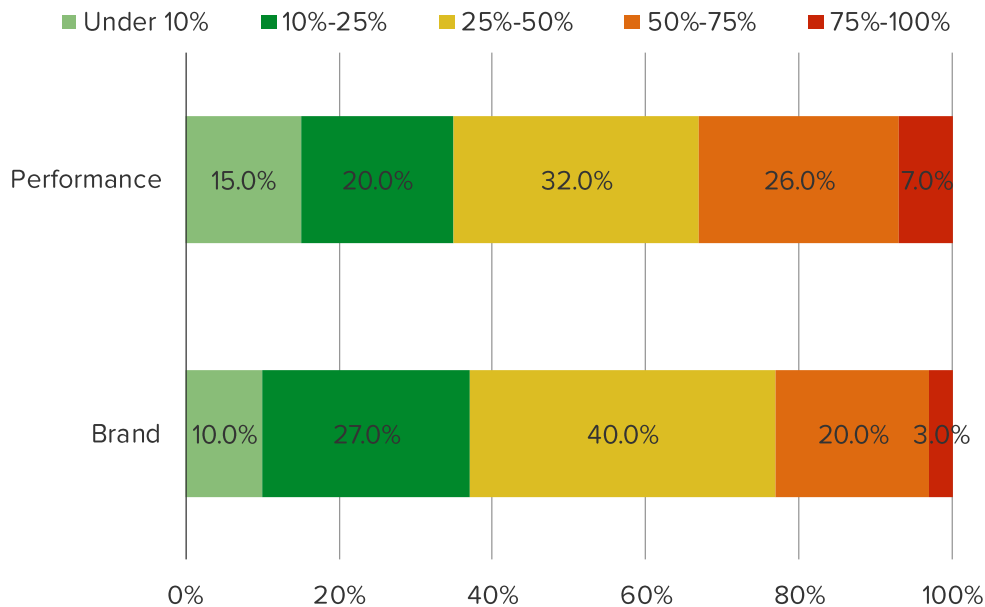


**WHAT PERCENTAGE TOTAL AD SPEND FROM YOUR CLIENTS IS FOR...**

This question was posed to the target audience.



**JUL (19) PERCENTAGE BREAKDOWN**

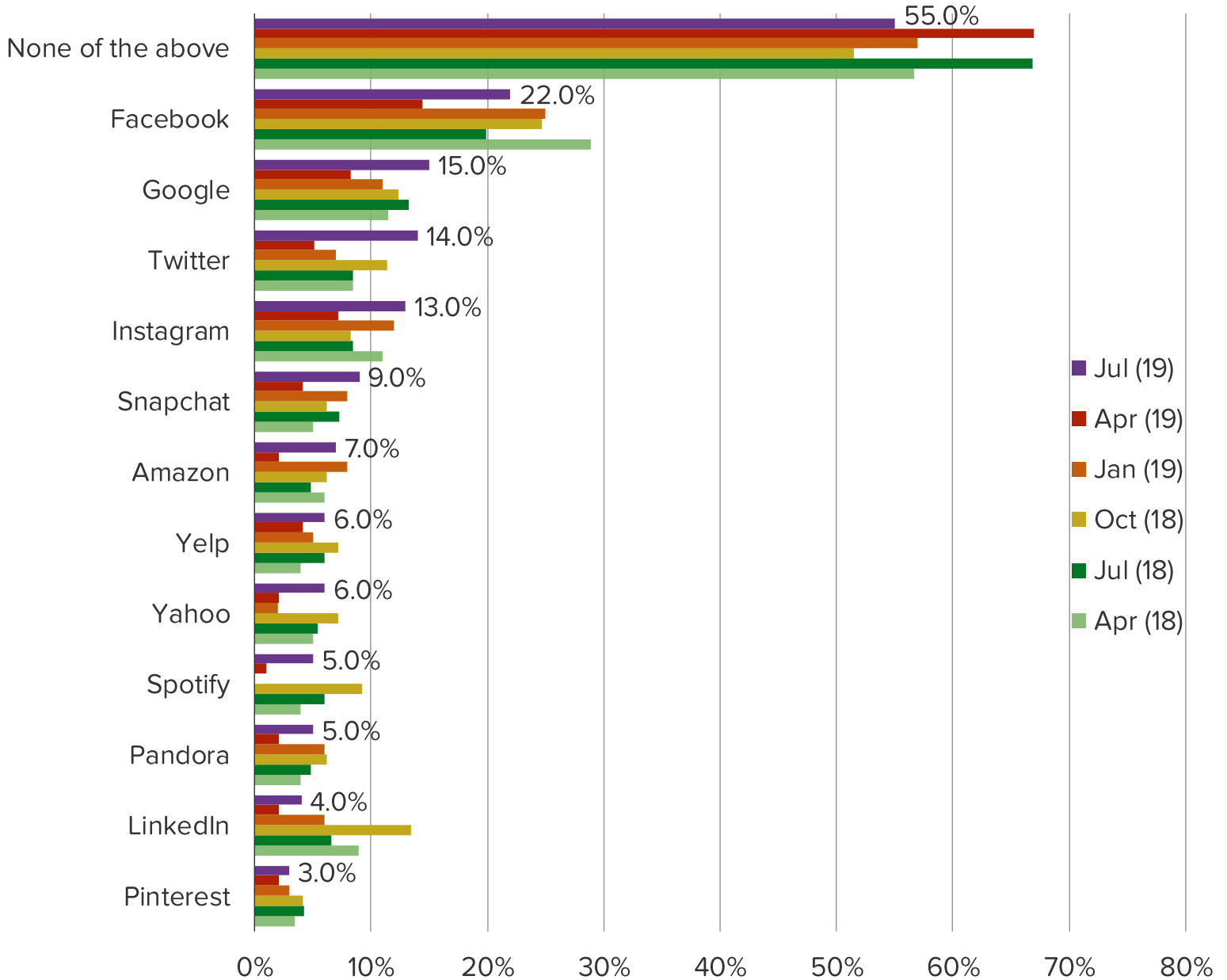




# CONCERNS

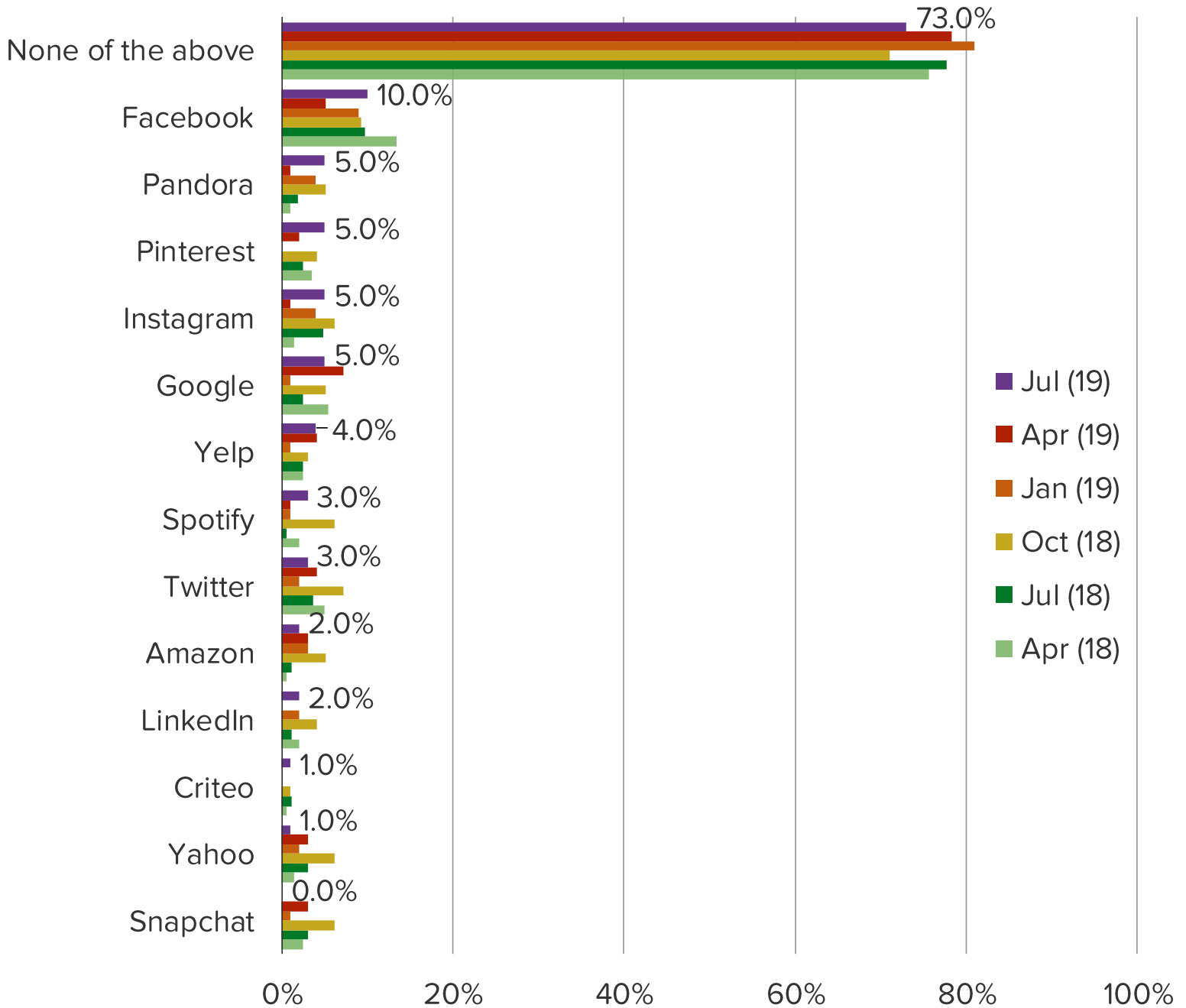
**HAVE CLIENTS RECENTLY CONTACTED YOU TO TALK ABOUT CONCERNS THEY HAVE ABOUT ANY OF THE FOLLOWING PLATFORMS?**

This question was posed to the target audience.



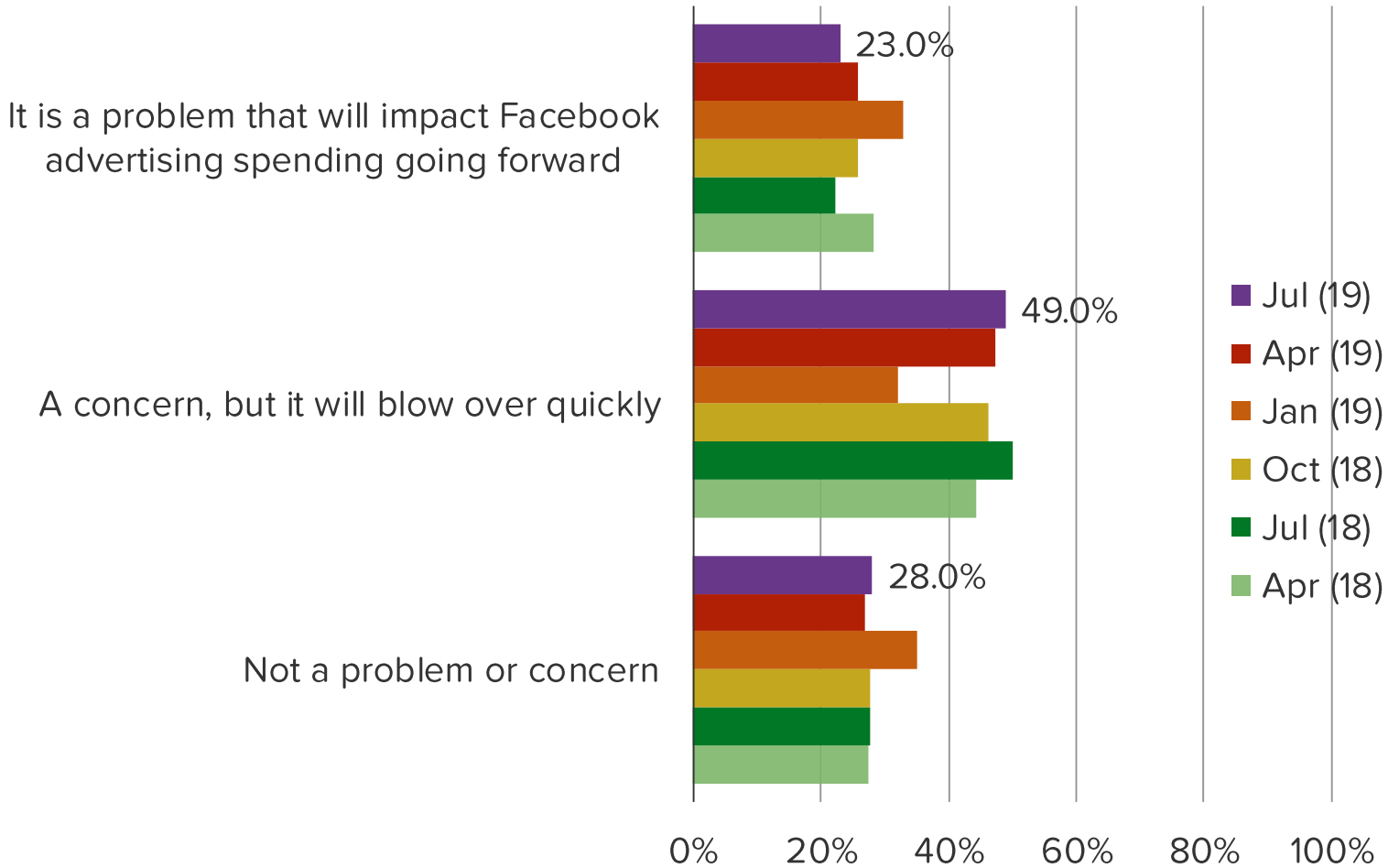
**HAVE YOU HAD CLIENTS CONTACT YOU IN THE PAST THREE MONTHS TO EITHER STOP OR REMOVE ADS ON ANY OF THE FOLLOWING PLATFORMS?**

This question was posed to the target audience.



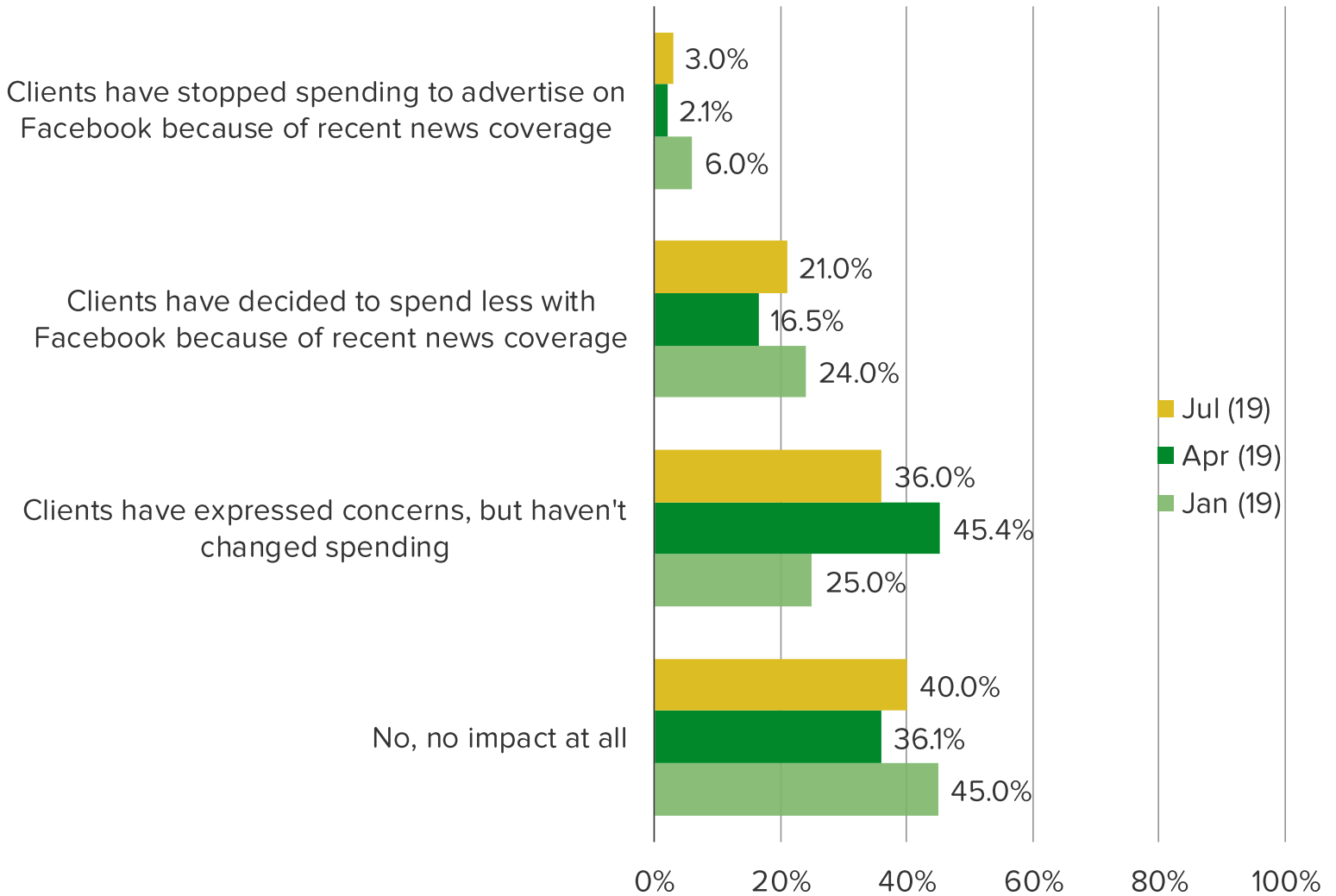
**IN YOUR OPINION, DO RECENT DATA PRIVACY / SECURITY CONCERNS AROUND FACEBOOK HAVE IMPACTS ON HOW YOUR CLIENTS ARE BEHAVING?**

This question was posed to the target audience.



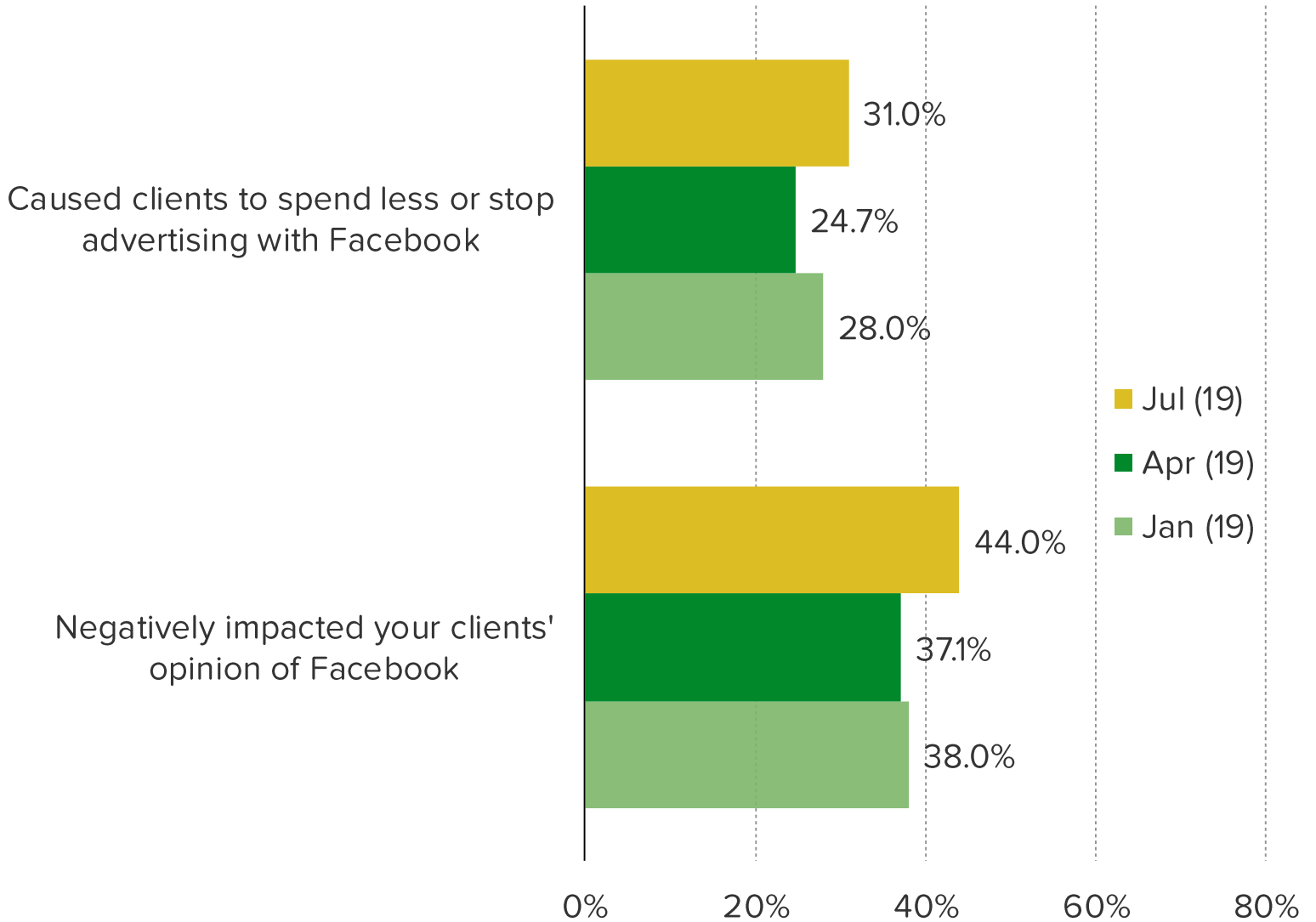
**HAS RECENT COVERAGE OF FACEBOOK IN THE NEWS (OVER THE PAST MONTH OR TWO) HAD ANY IMPACT ON YOUR CLIENTS SPENDING TO ADVERTISE ON FACEBOOK?**

This question was posed to the target audience.



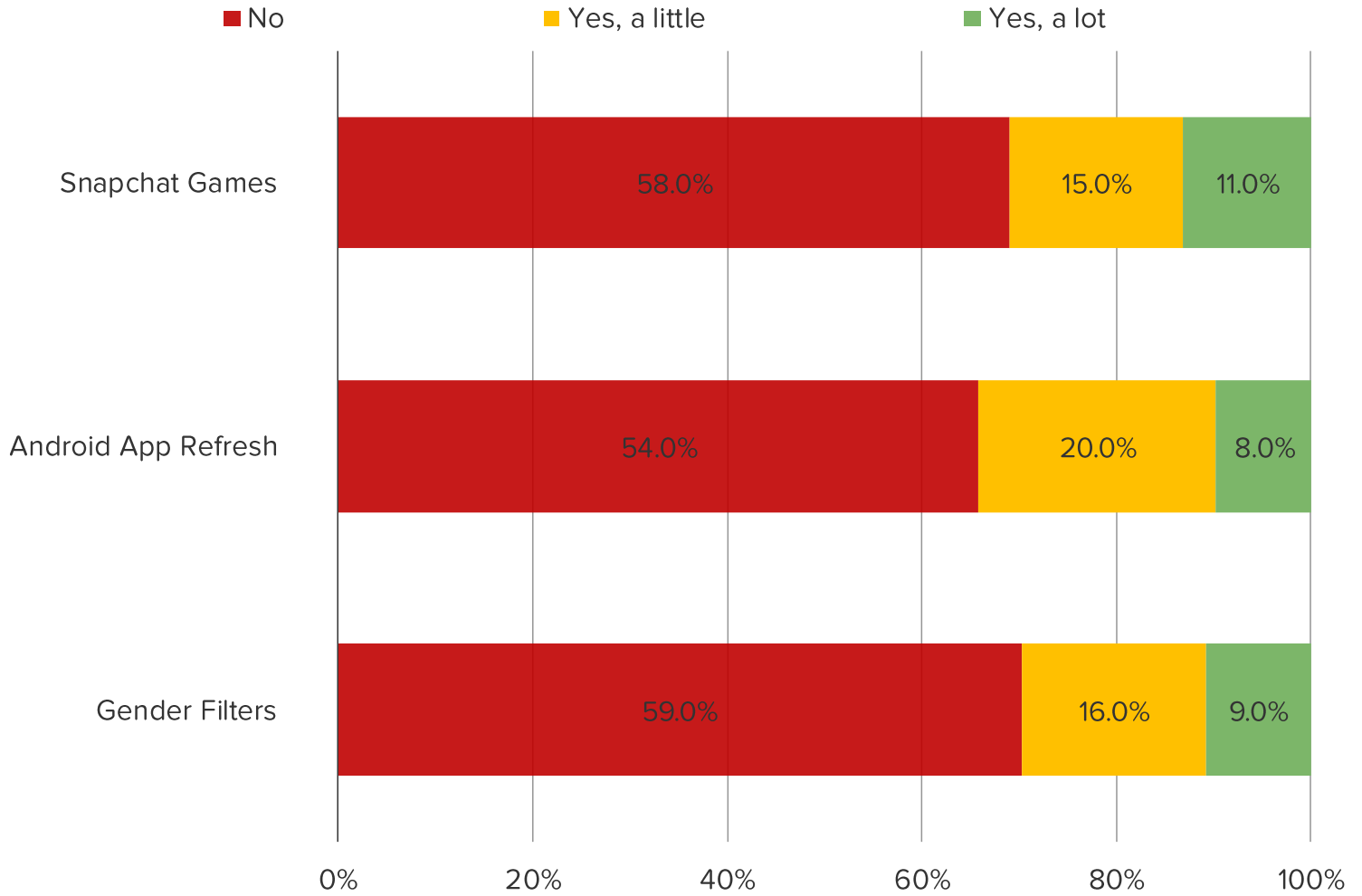
**IN YOUR OPINION, HAS RECENT COVERAGE OF FACEBOOK (OVER THE PAST MONTH OR TWO) BY THE NEW YORK TIMES...**

This question was posed to the target audience.



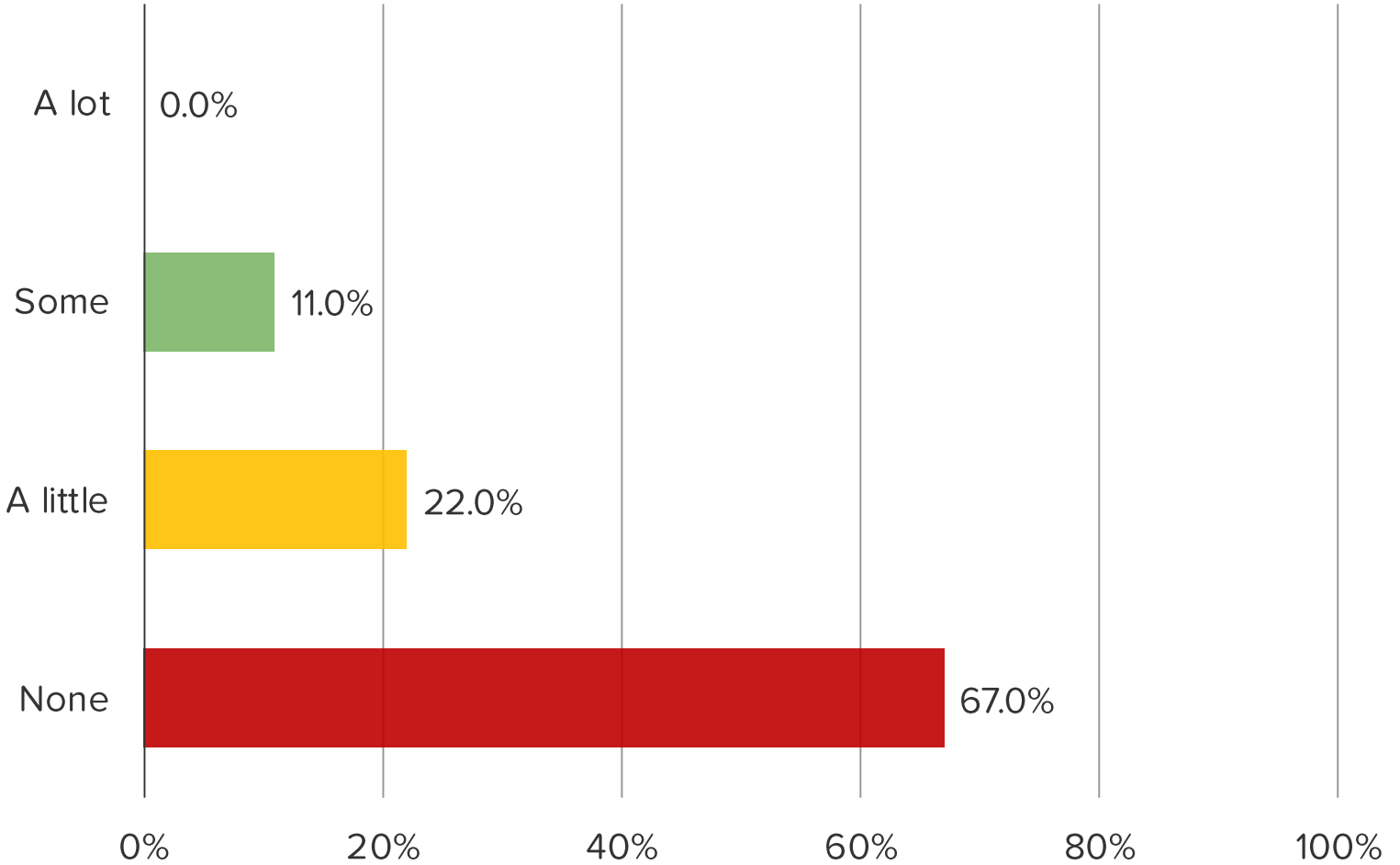
**IN YOUR OPINION, HAS THE ADDITION OF ANY OF THE FOLLOWING FEATURES MADE SNAPCHAT MORE ATTRACTIVE AS AN AVENUE FOR ADVERTISEMENT?**

This question was posed to the target audience.



**DO YOUR CLIENTS HAVE ANY INTEREST IN TIK TOK?**

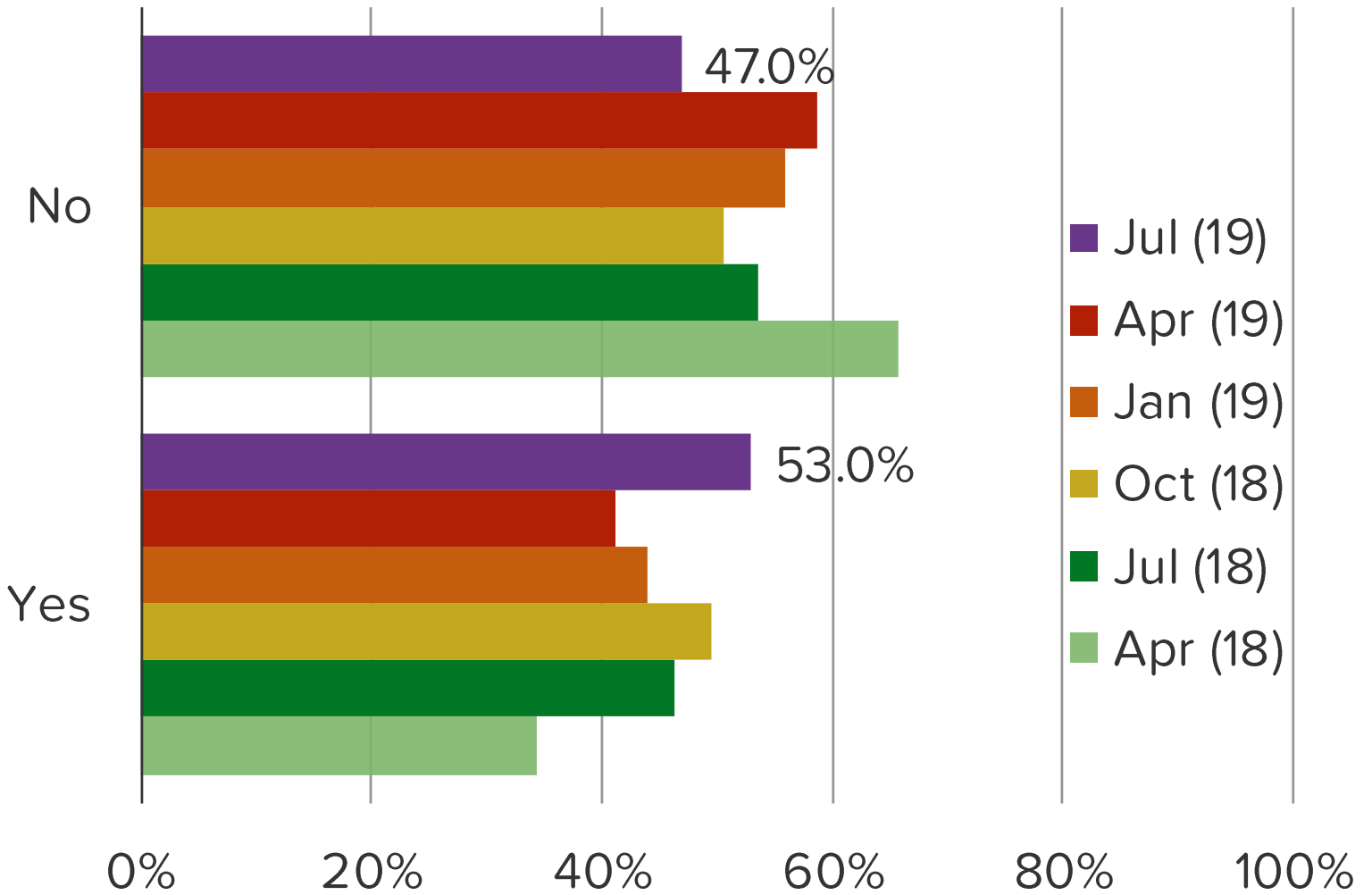
This question was posed to the target audience.





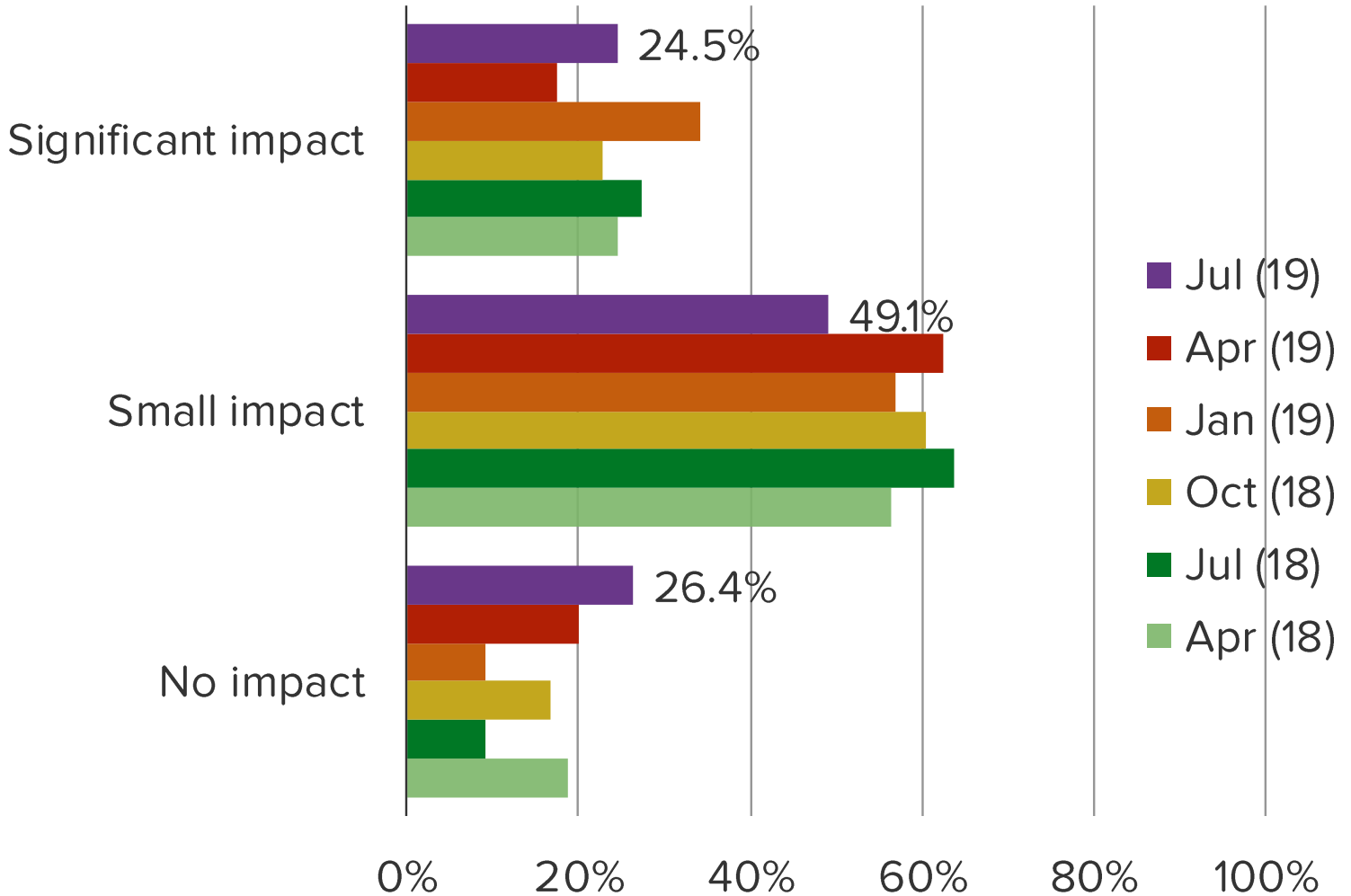
**ARE YOU FAMILIAR WITH GDPR (GENERAL DATA PROTECTION REGULATION)?**

This question was posed to the target audience.



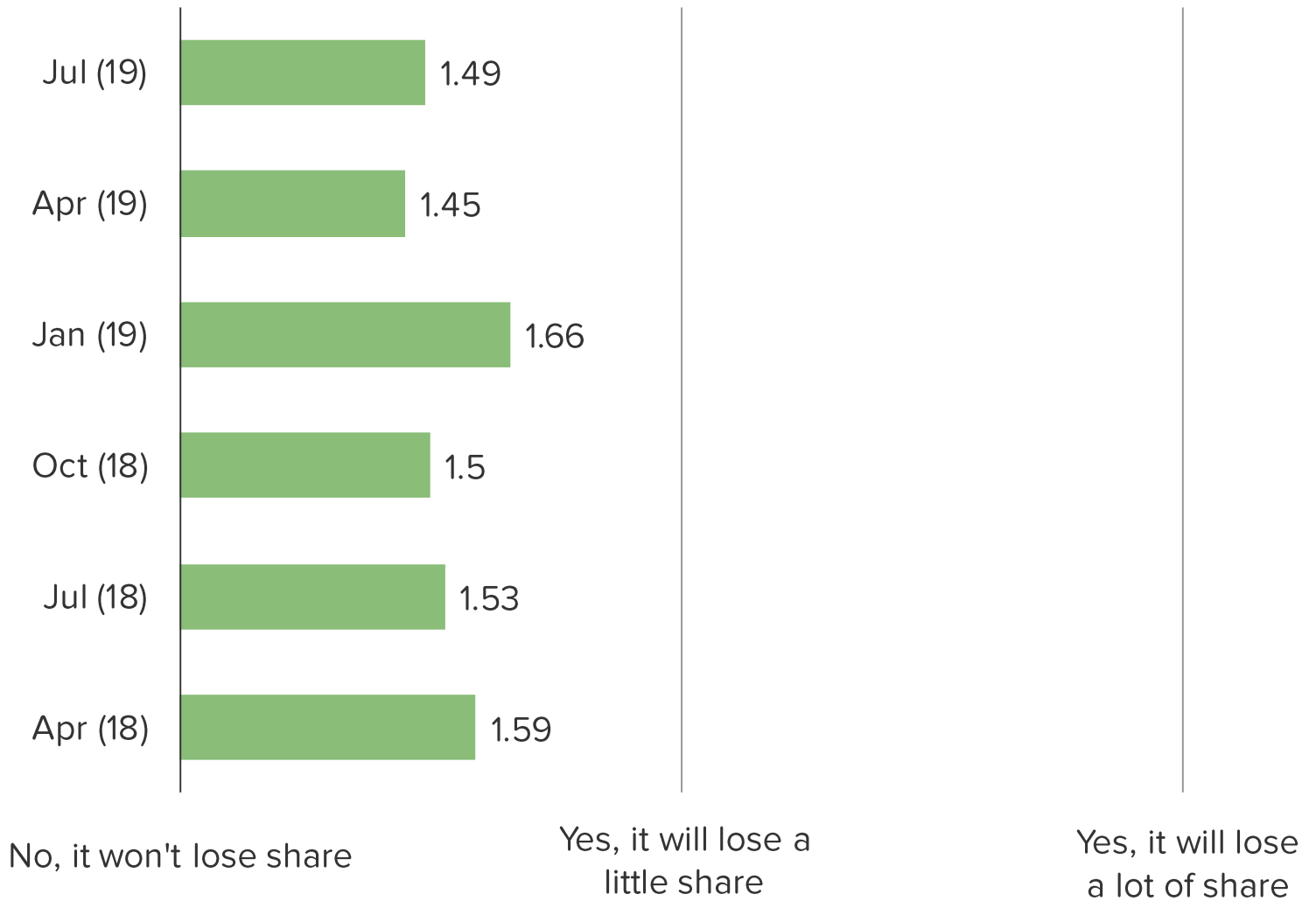
**IN YOUR OPINION, WILL GDPR IMPACT THE QUALITY OR QUANTITY OF TARGETED DATA THAT DIGITAL PLATFORMS COLLECT ON USERS?**

This question was posed to respondents who are familiar with GDPR.



**DO YOU THINK GDPR WILL CAUSE DIGITAL ADVERTISING TO LOSE MARKET SHARE TO ALTERNATIVE METHODS LIKE TV, RADIO, PRINT, ETC?**

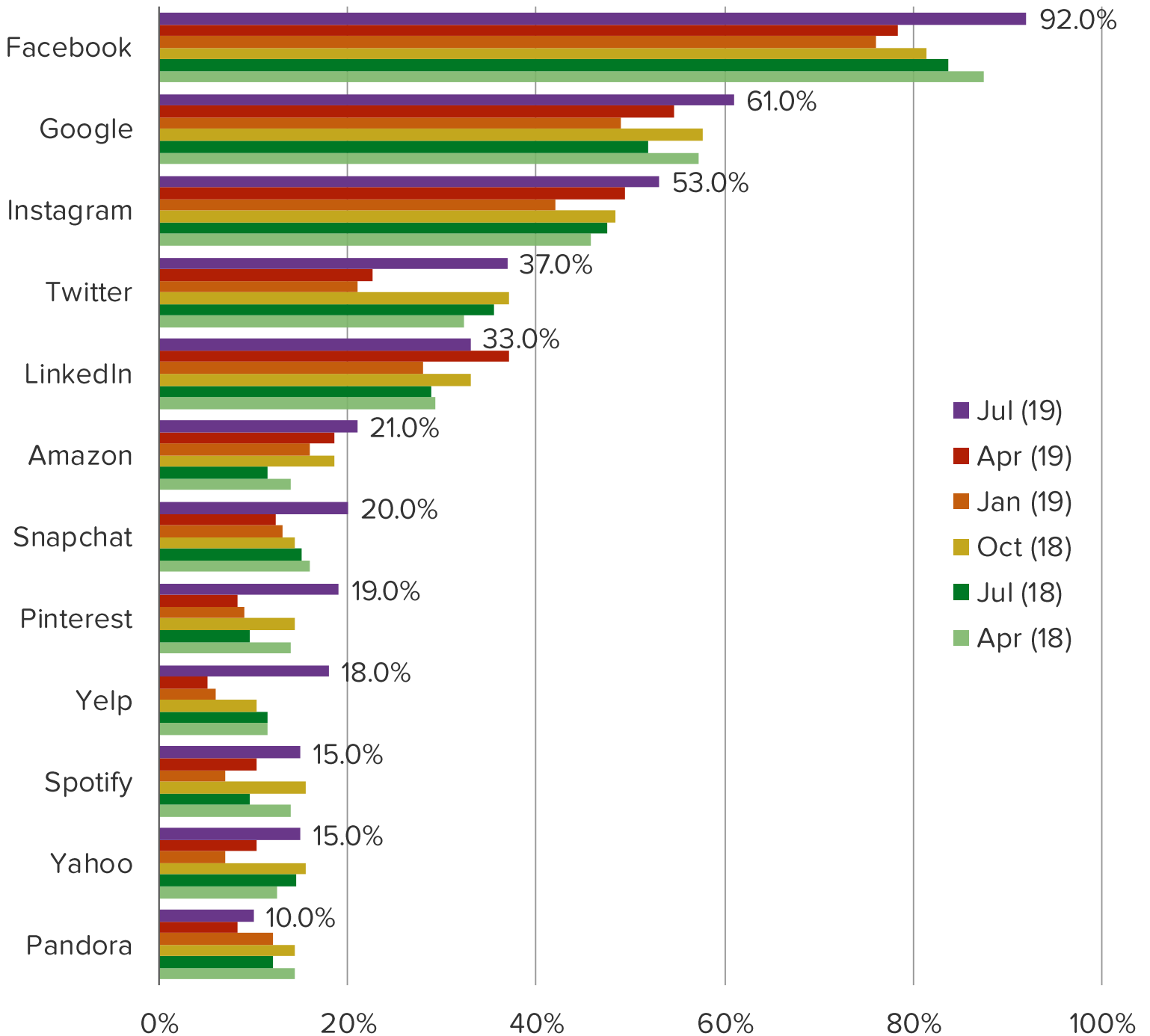
This question was posed to respondents who are familiar with GDPR.



# MARKET SHARE

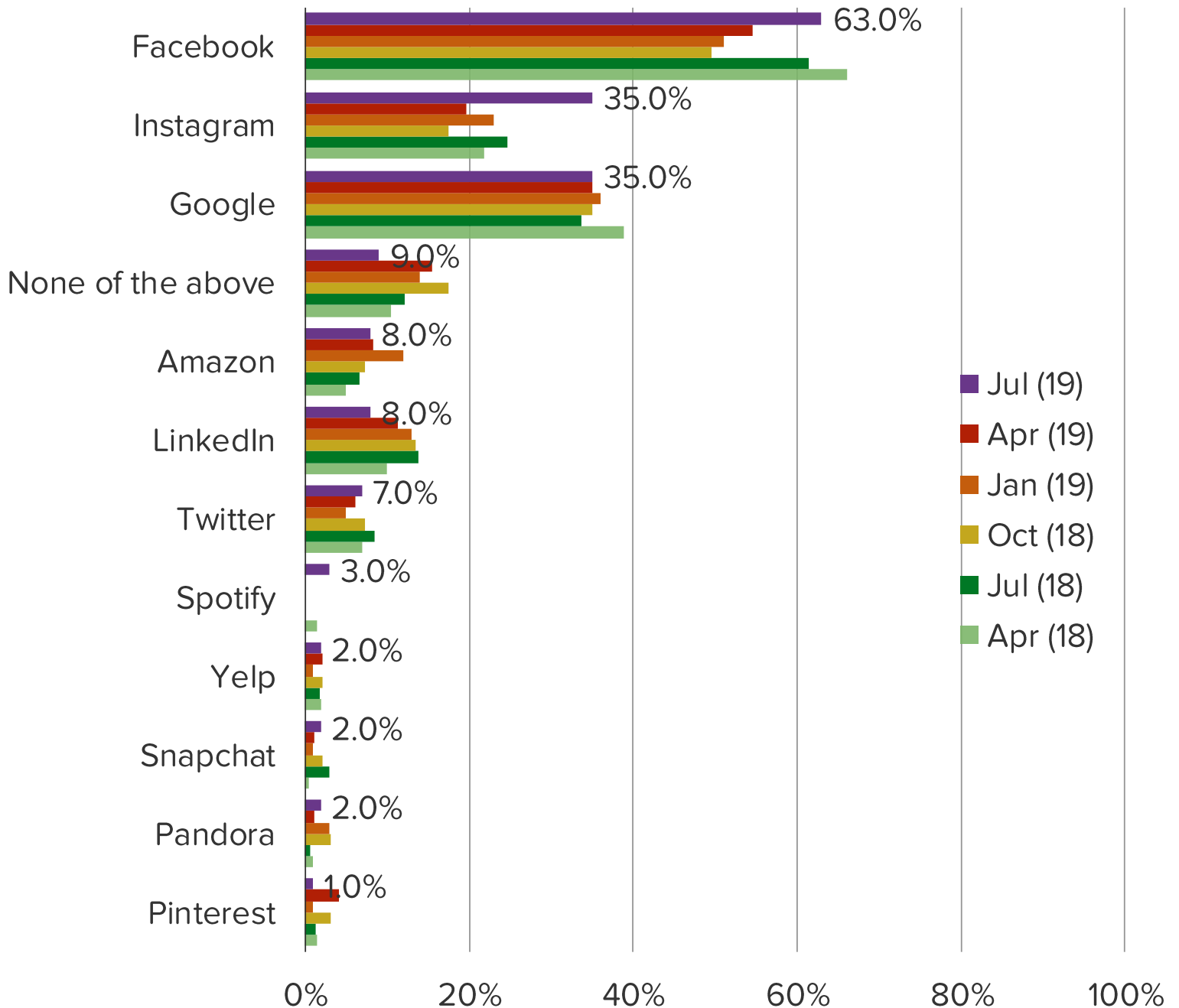
**DO YOUR CLIENTS CURRENTLY HAVE ADVERTISING CAMPAIGNS WITH THE FOLLOWING PLATFORMS?**

This question was posed to the target audience.



**WHEN YOUR CLIENTS DECIDE TO SPEND MORE ON ADVERTISING, WHICH PLATFORMS ARE YOU USUALLY MOST INTERESTED IN PURSUING CAMPAIGNS WITH?**

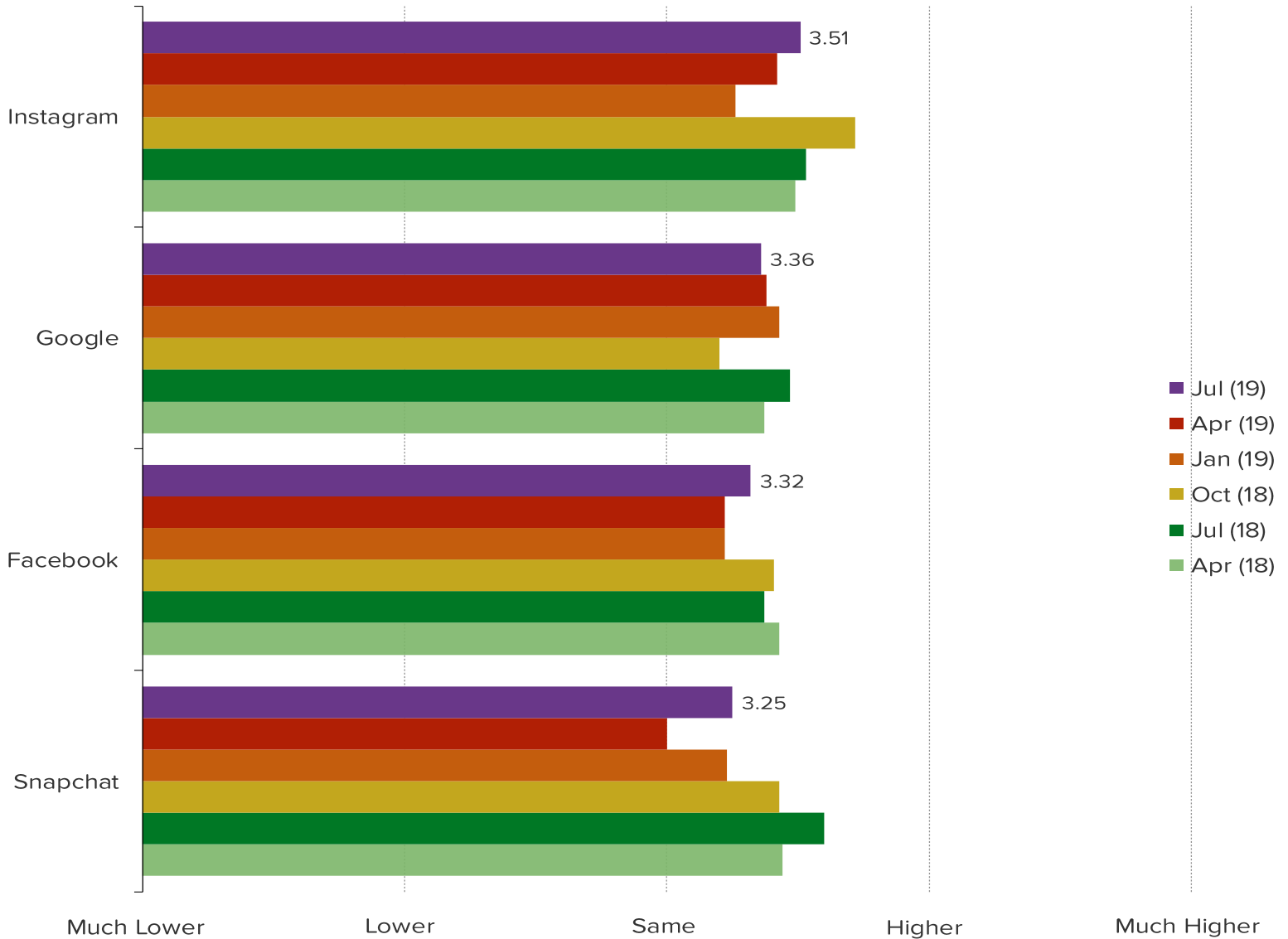
\*Posed to the target audience.



# SPEND CHANGES

**PLEASE COMPARE YOUR CLIENT'S AD SPENDING ON THE FOLLOWING NOW VS. ONE YEAR AGO.**

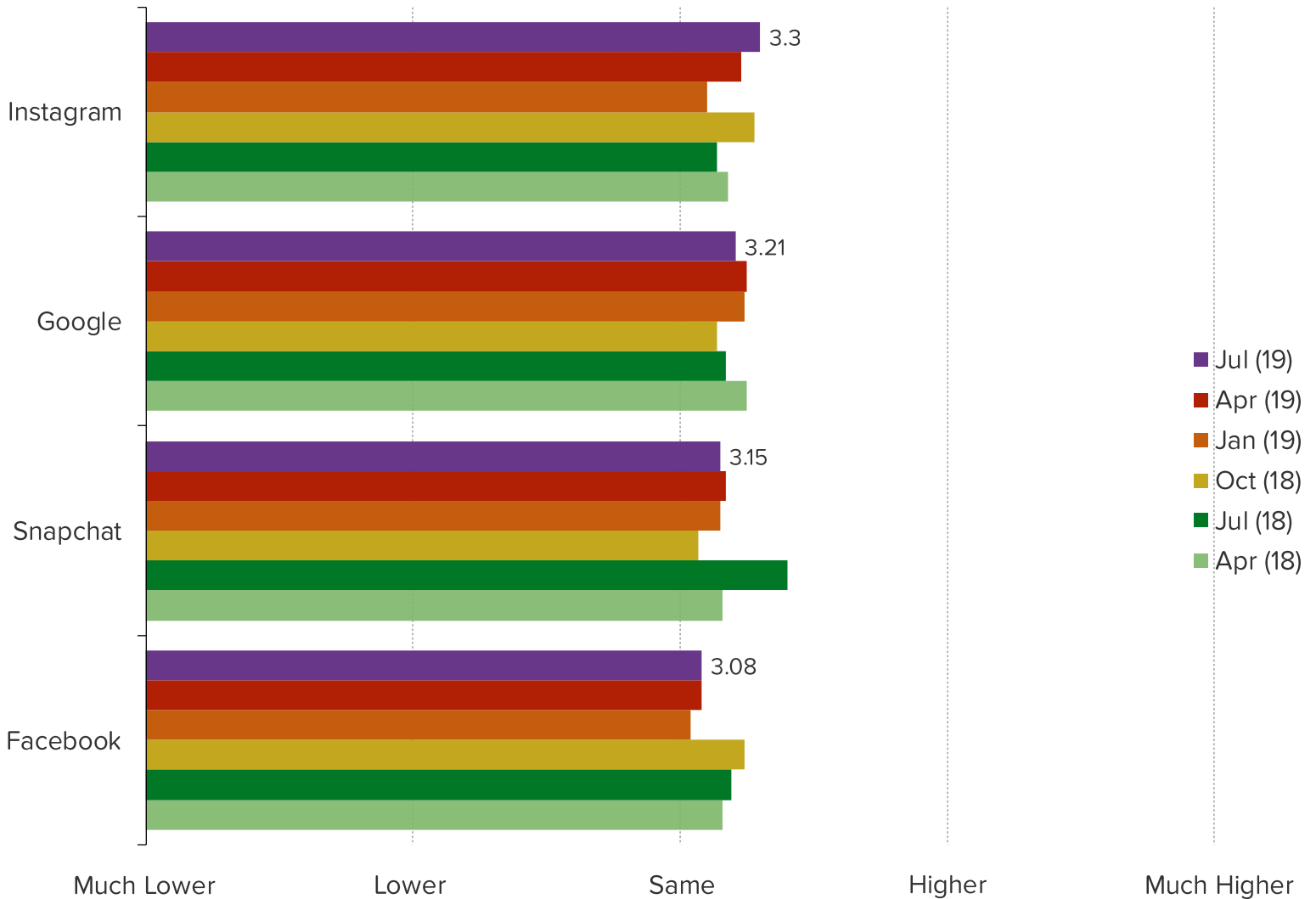
\*Posed to ad execs whose clients have paid campaigns with each of the following platforms





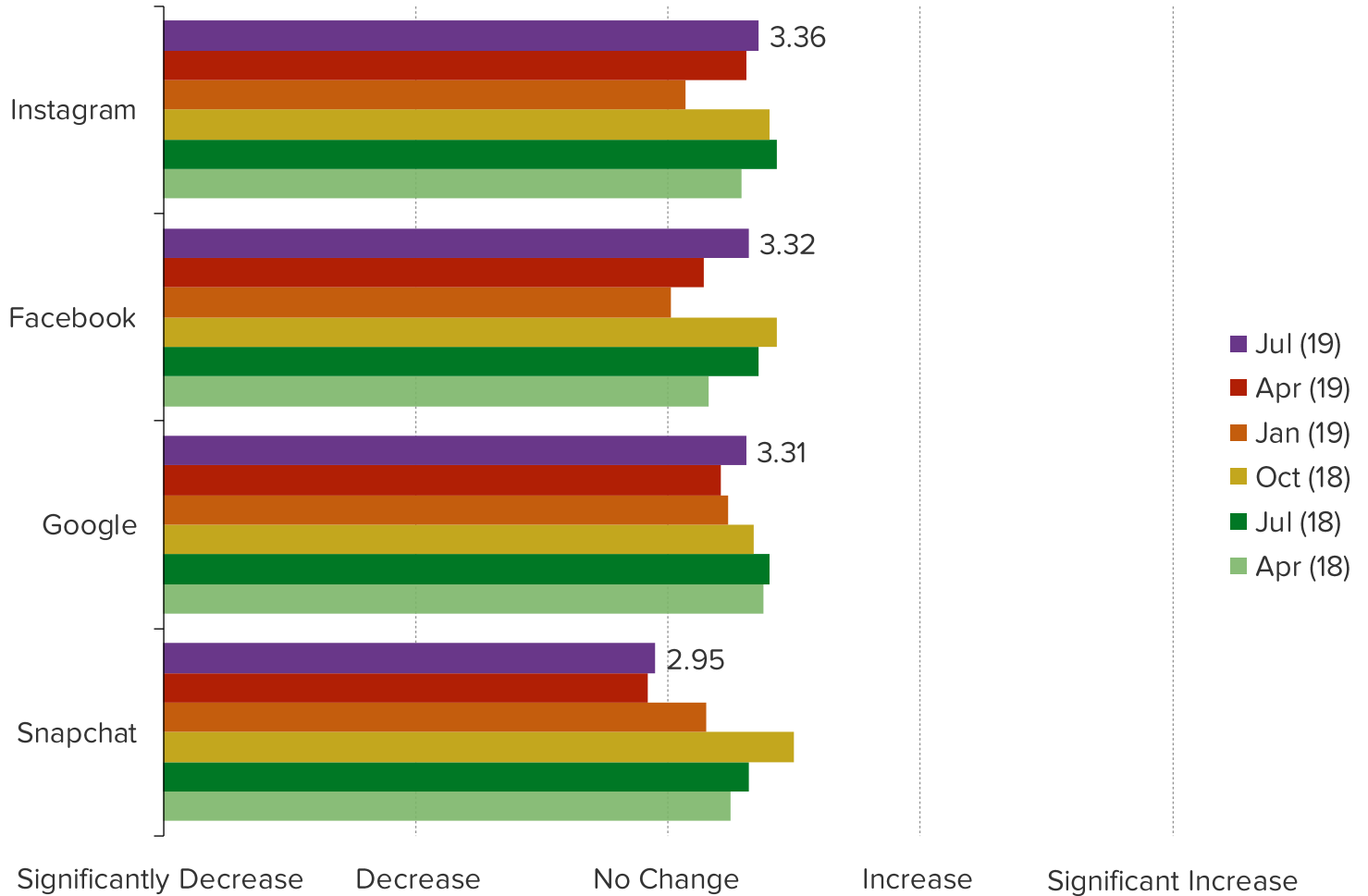
**PLEASE COMPARE YOUR CLIENT'S AD SPENDING NOW VS. ONE QUARTER AGO.**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



**DO YOU EXPECT TO CHANGE SPEND THROUGH THE FOLLOWING PLATFORMS IN THE NEXT 12 MONTHS?**

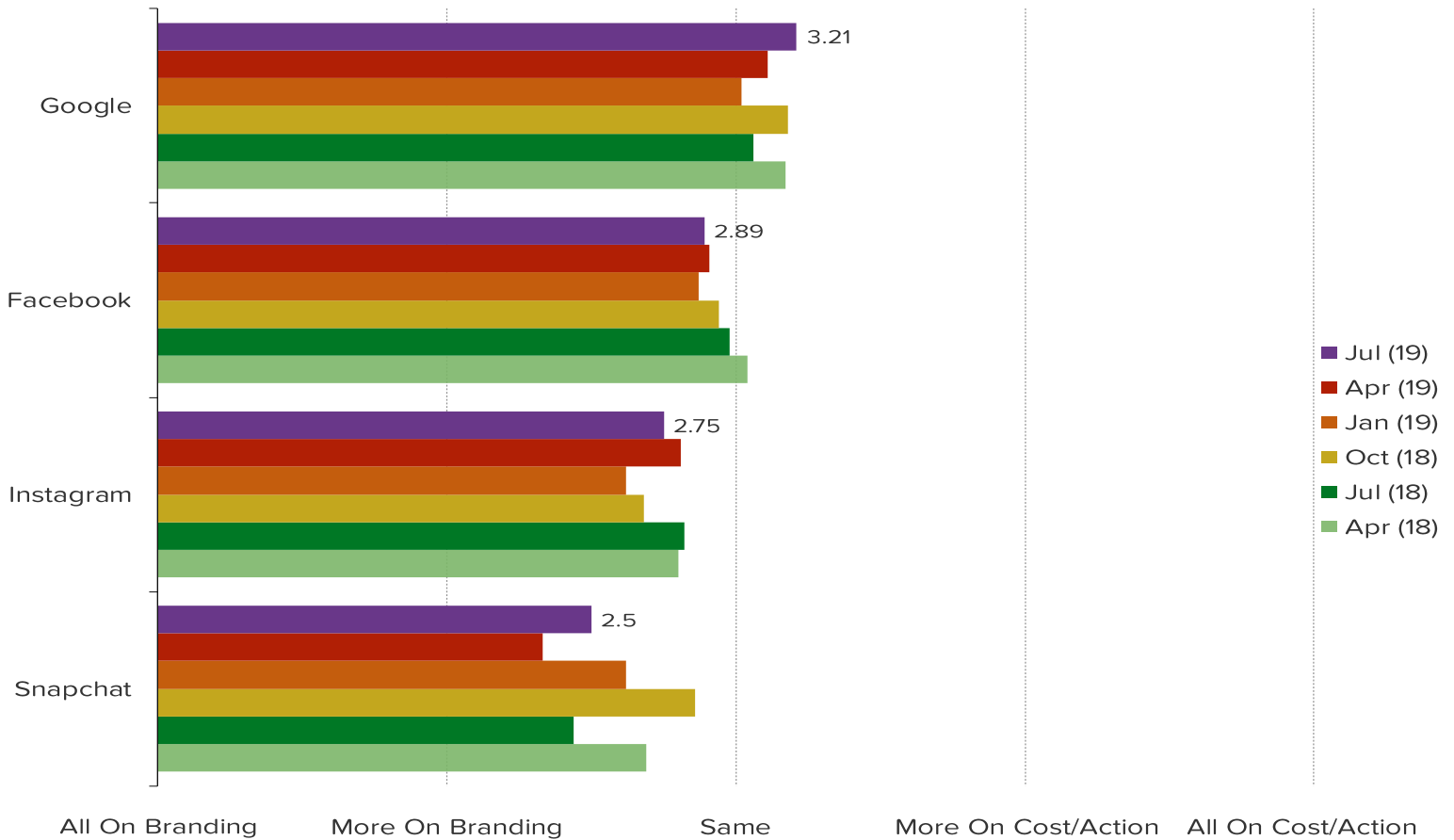
\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



# SPENDING CATALYSTS

**WHICH OF THE FOLLOWING BEST DESCRIBES THE PURPOSE OF YOUR CLIENT'S AD SPENDING WITH EACH OF THESE PLATFORMS?**

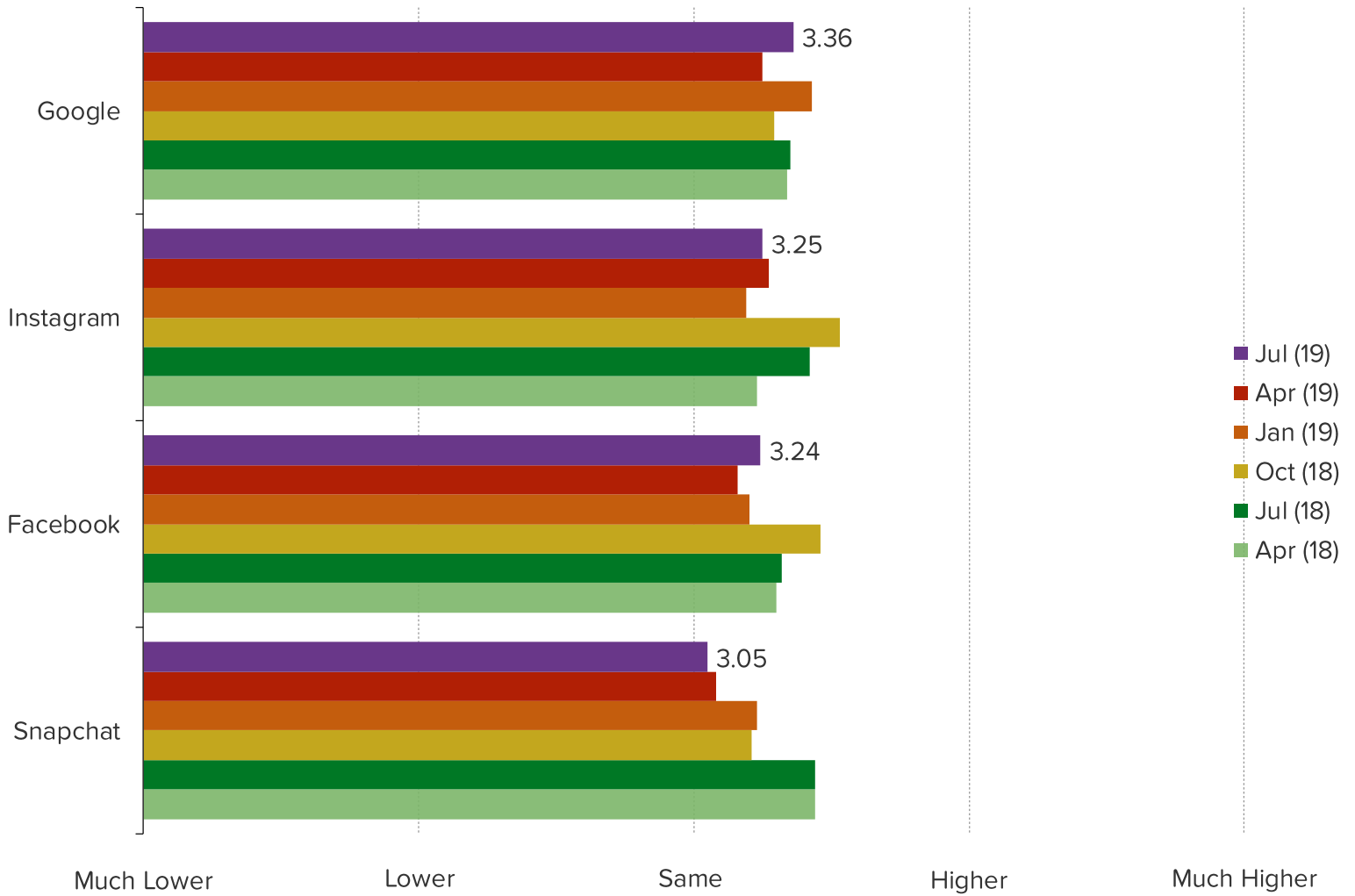
\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



# PRICING CHANGES

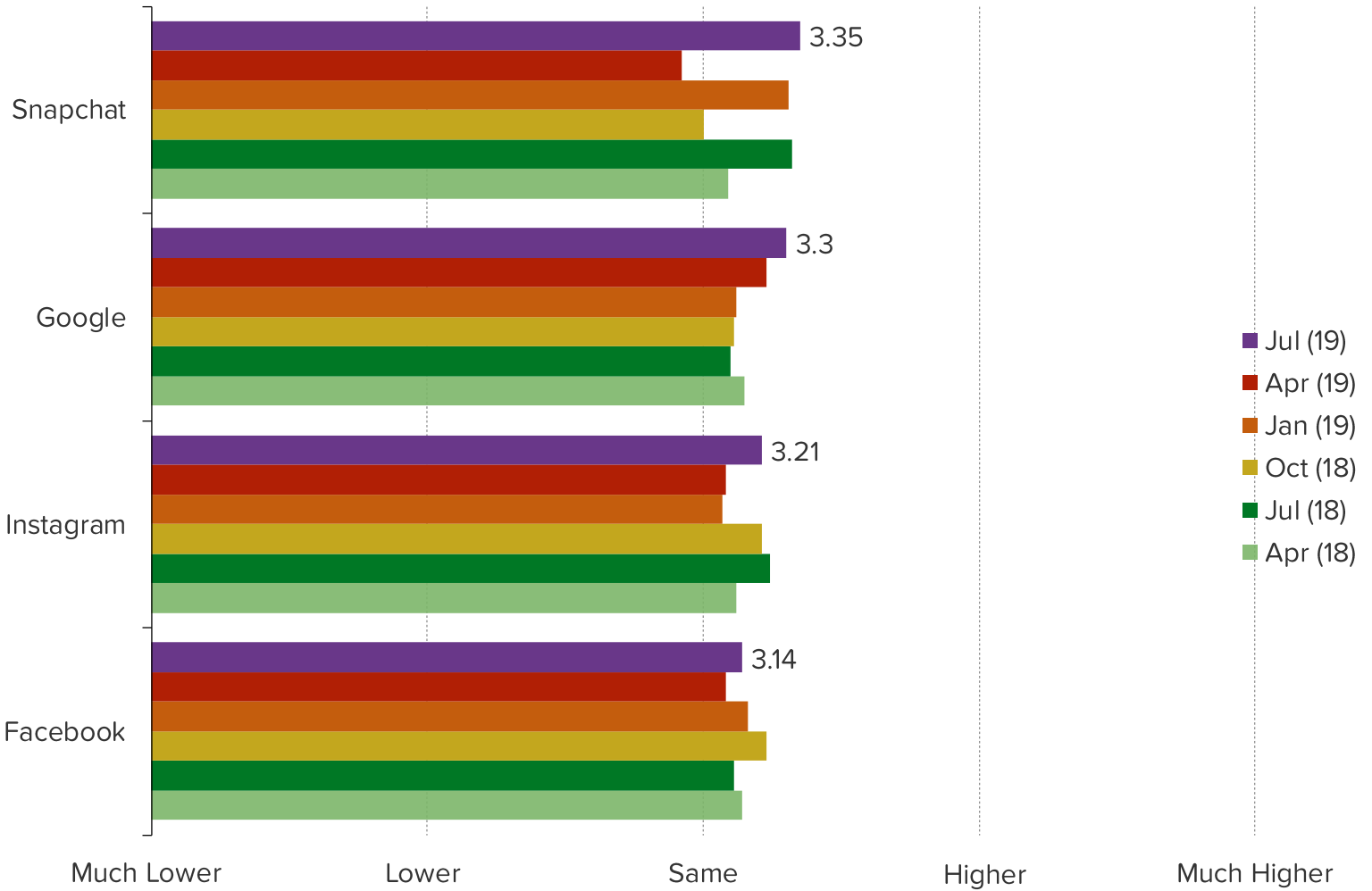
**PLEASE COMPARE PRICING TO ADVERTISE WITH EACH PLATFORM COMPARED TO ONE YEAR AGO.**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



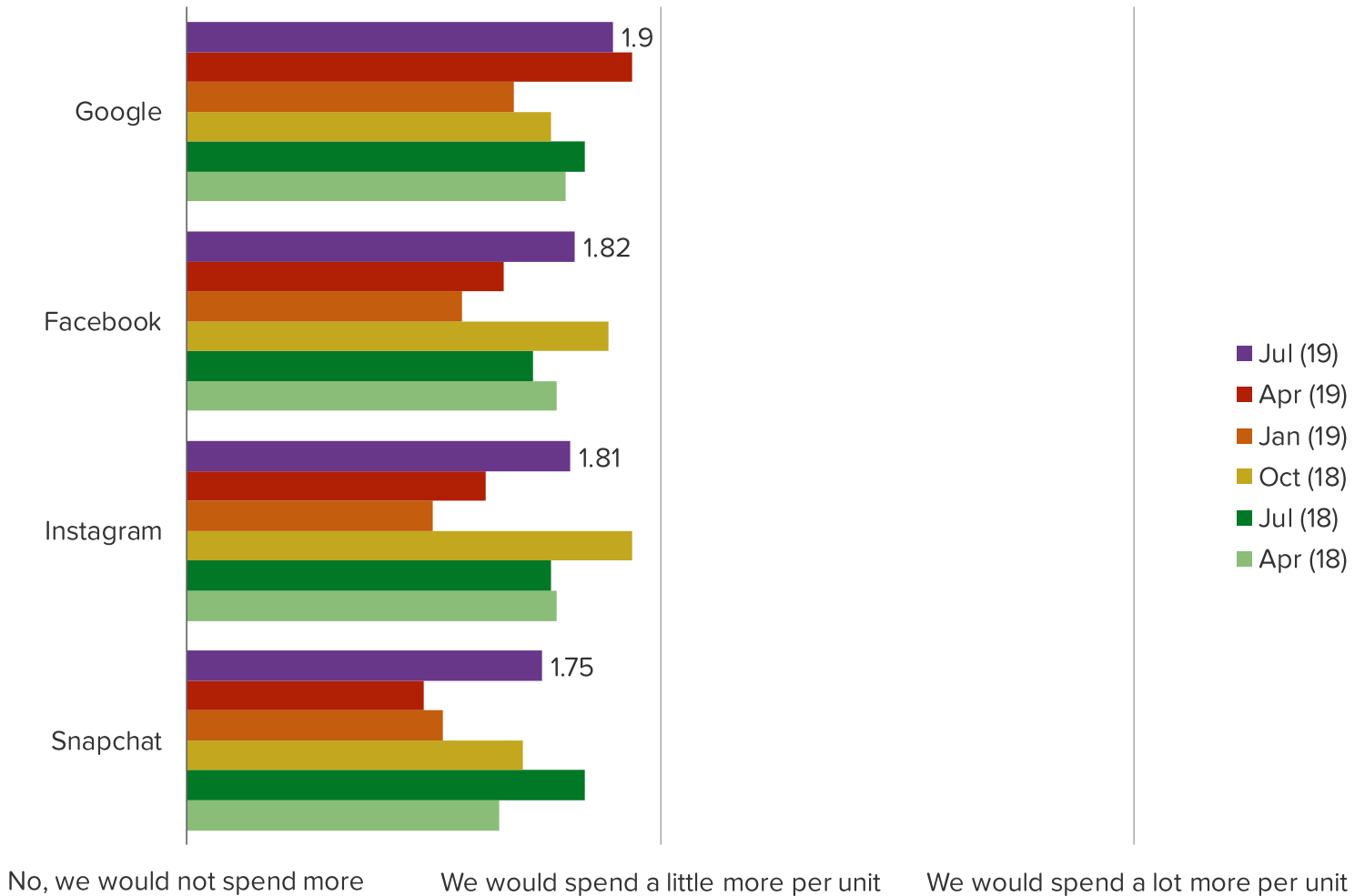
**PLEASE COMPARE PRICING TO ADVERTISE WITH EACH PLATFORM COMPARED TO ONE QUARTER AGO.**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



**IF THE PLATFORM INCREASED ADVERTISING PRICING, WOULD YOUR CLIENTS BE WILLING TO SPEND MORE PER AD UNIT?**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms

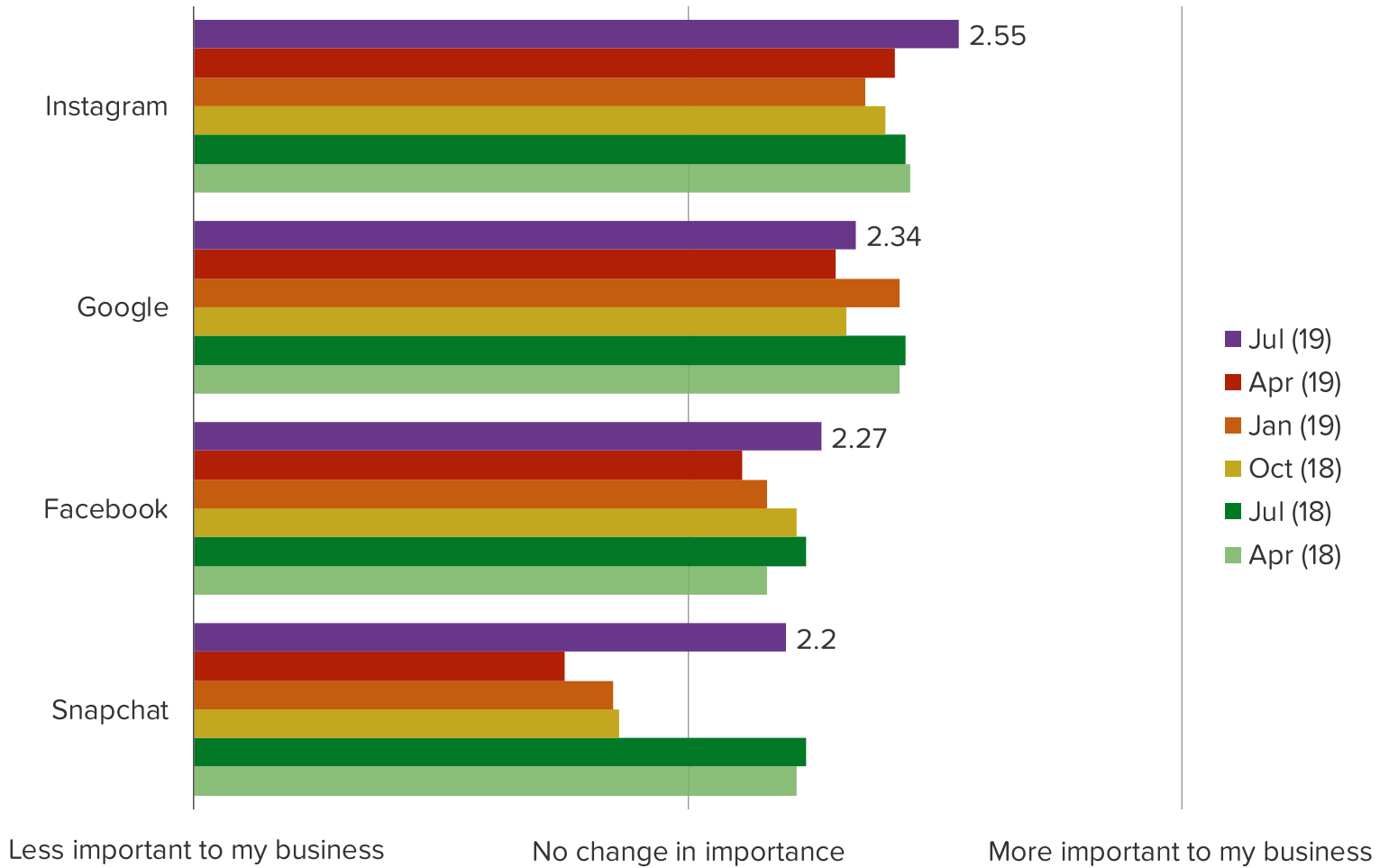




# SENTIMENT TOWARD PLATFORMS

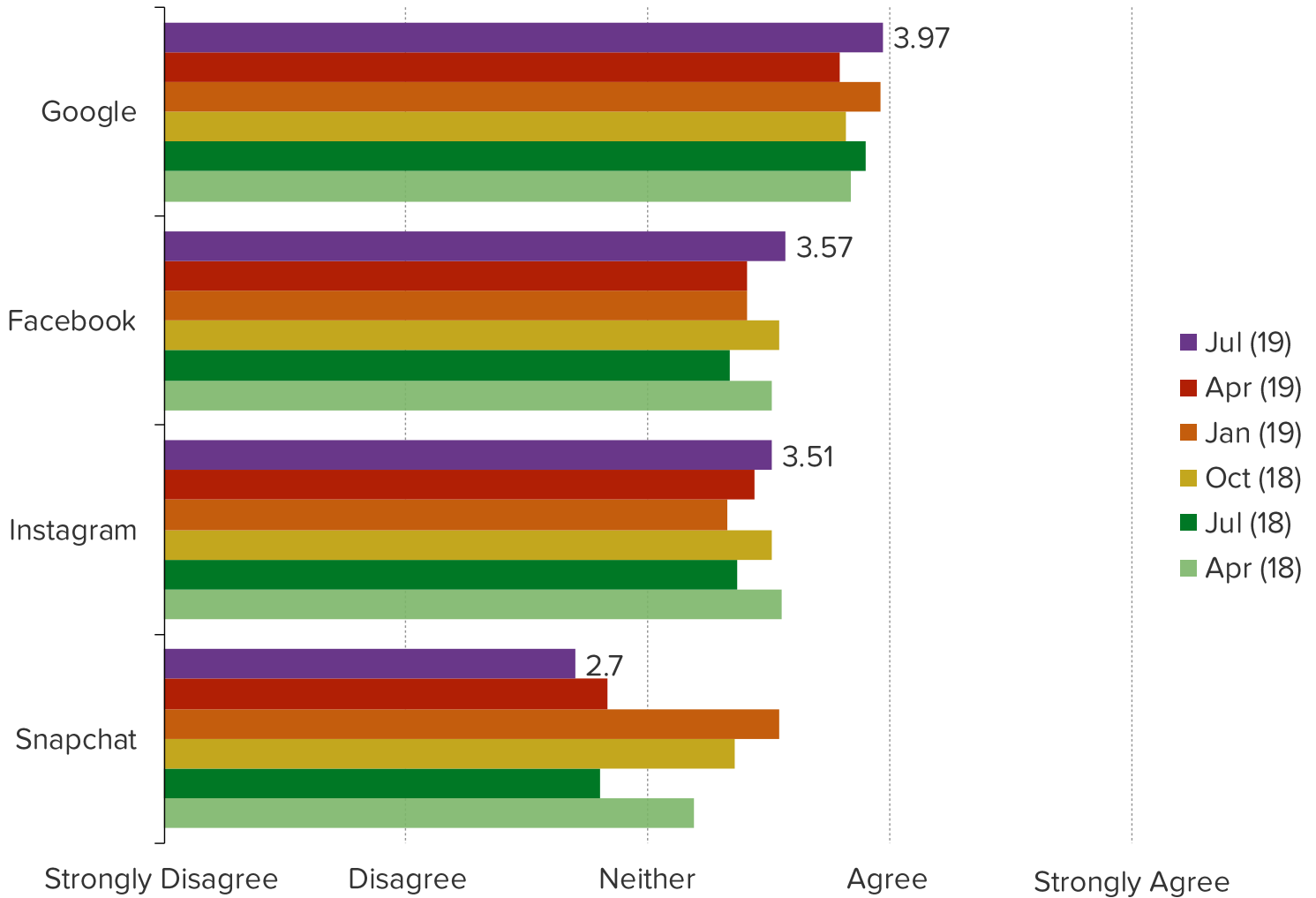
**AS YOU LOOK INTO THE FUTURE, IS EACH PLATFORM BECOMING:**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



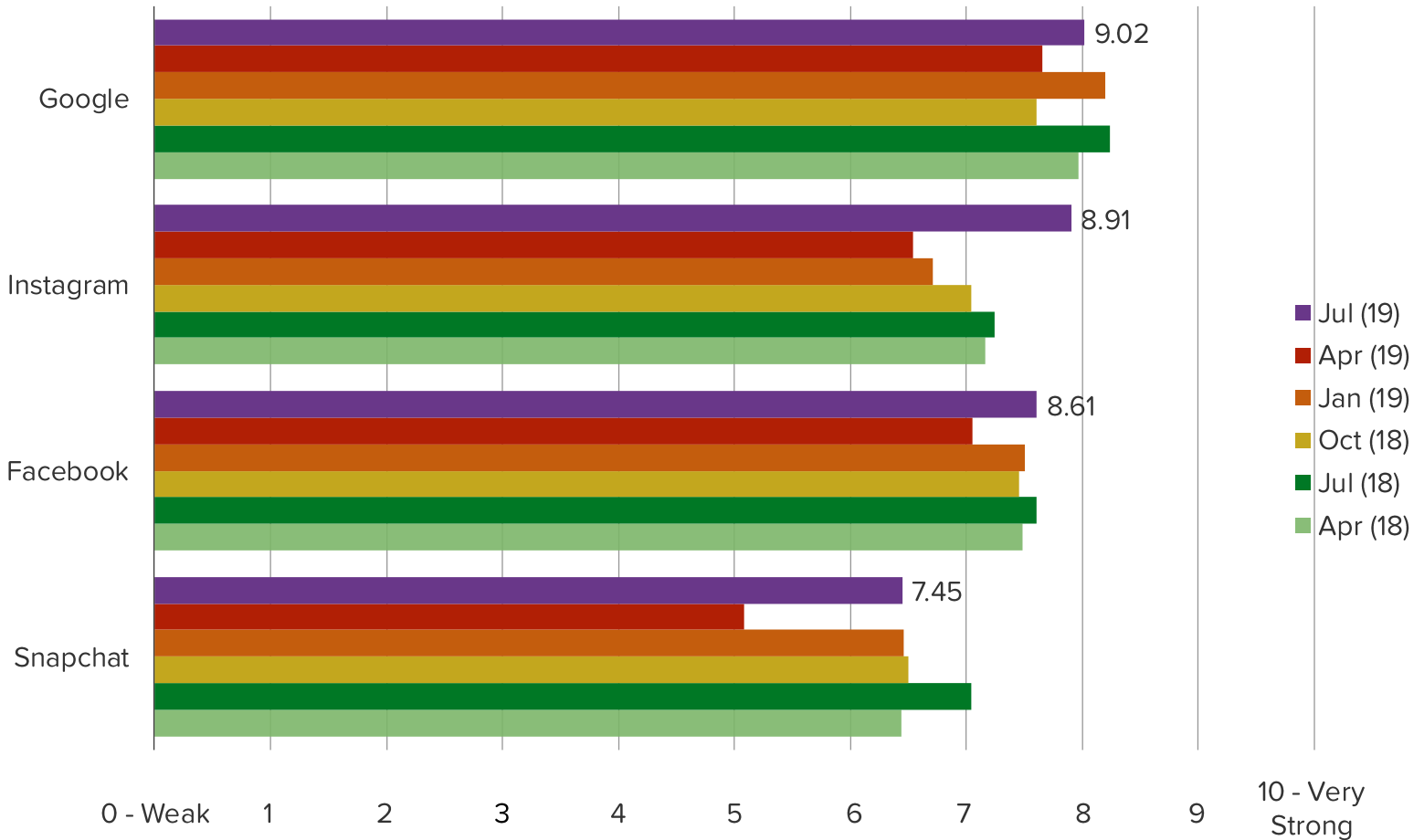
**PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENT: “IF IT WENT AWAY TOMORROW, IT WOULD BE DETRIMENTAL TO MY BUSINESS”**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



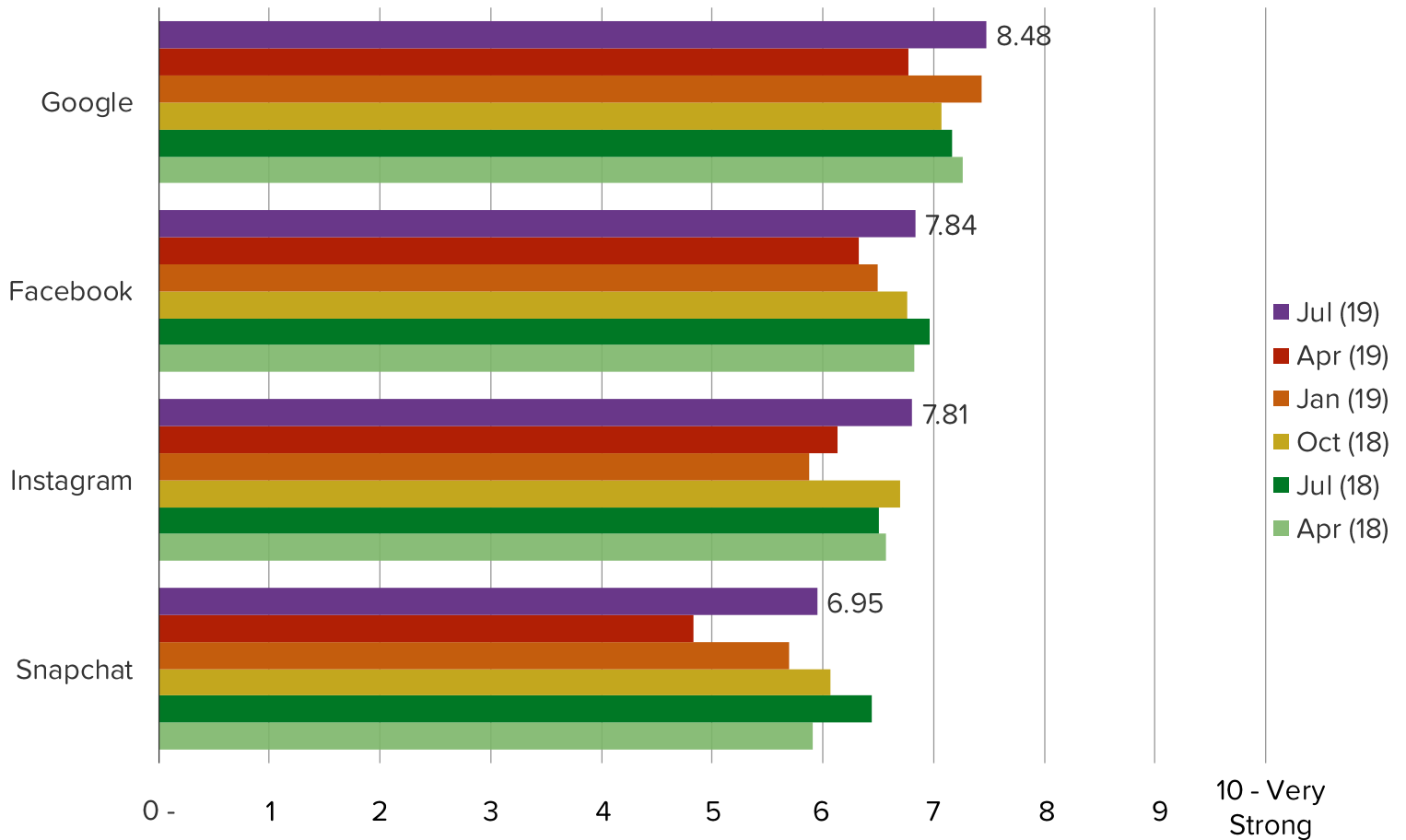
**WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVERS WHEN IT COMES TO REACH?**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



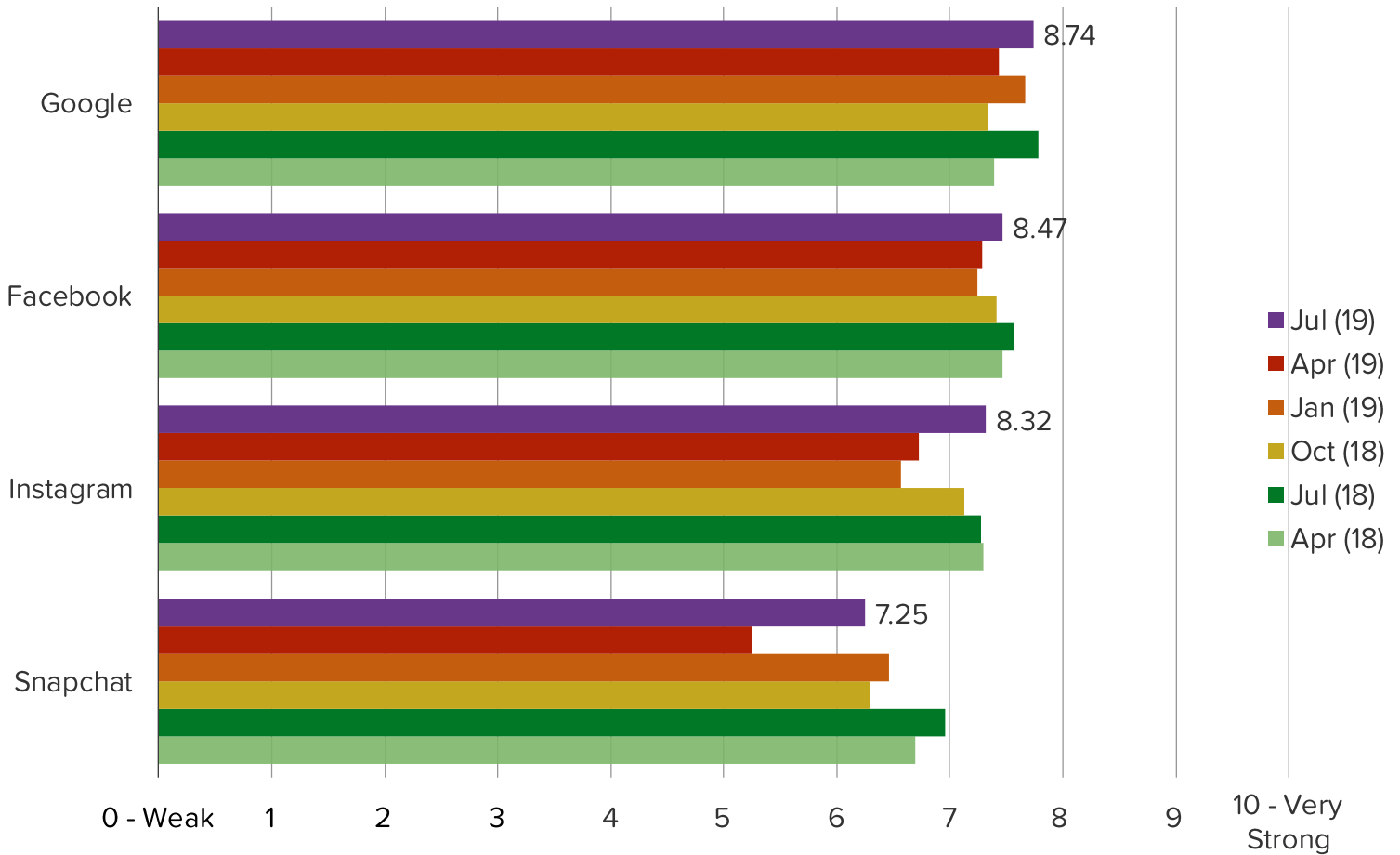
**WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO RETURN ON ADVERTISING INVESTMENT?**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



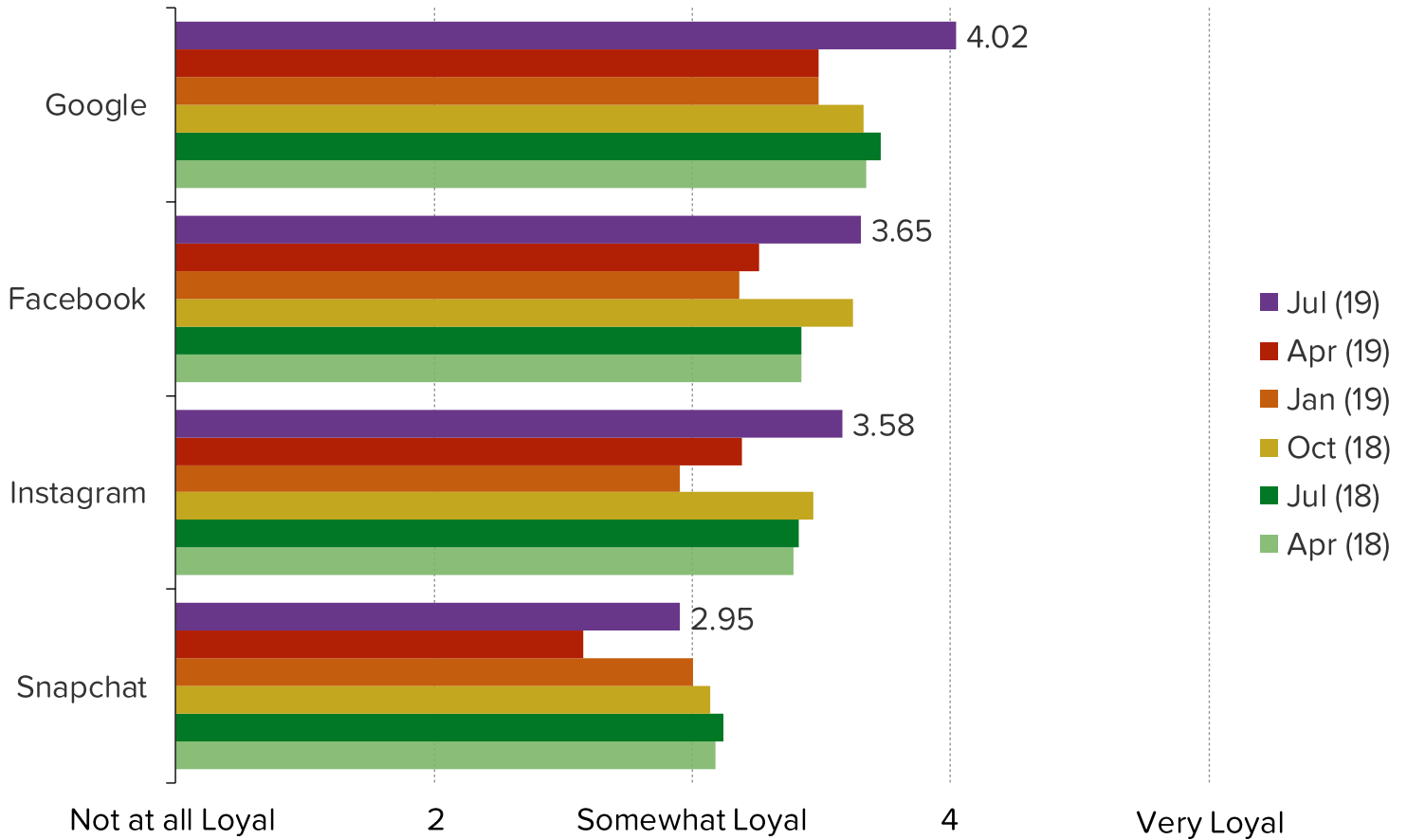
**WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO TARGETING DATA THEY HAVE ON USERS?**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



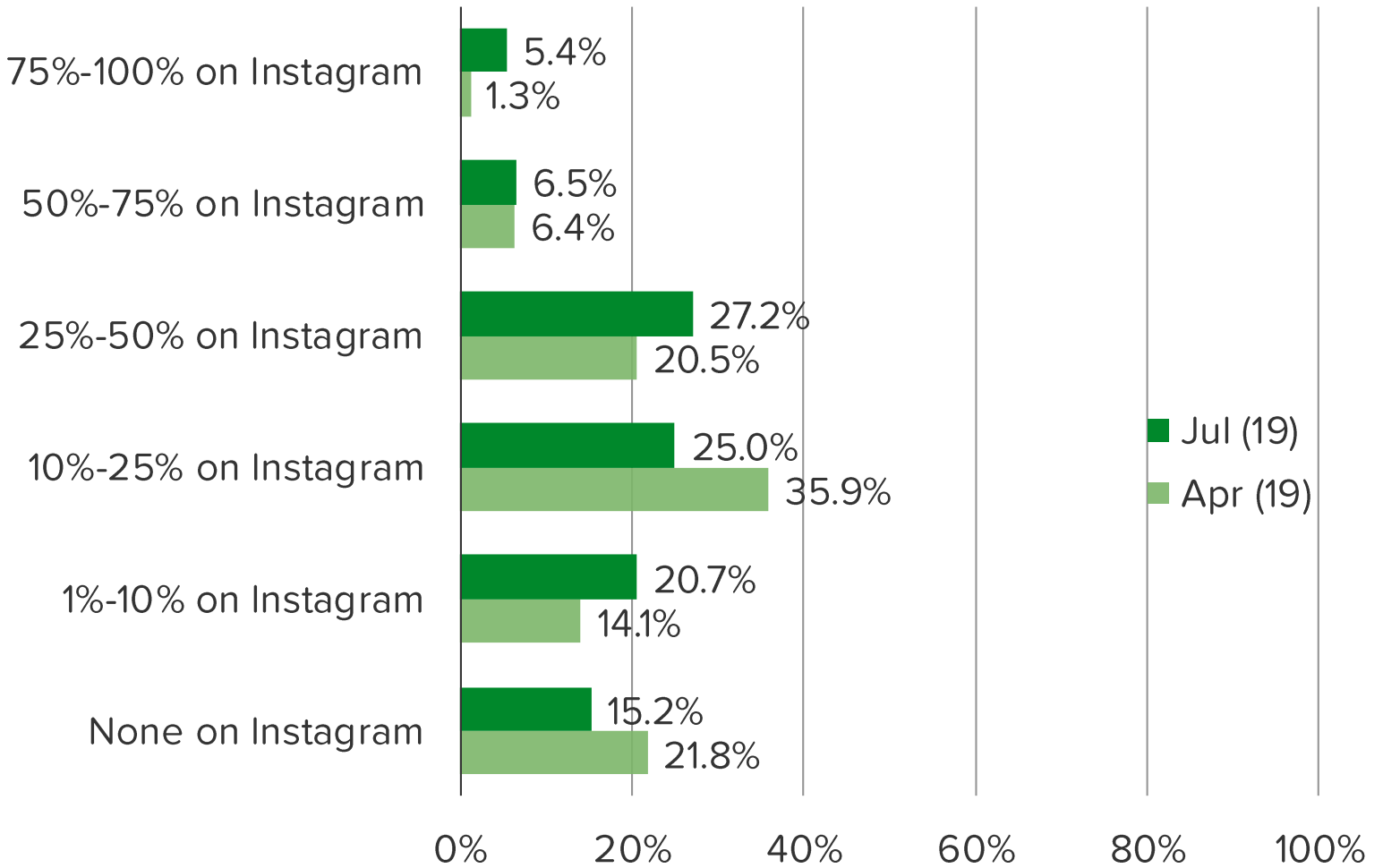
**HOW LOYAL IS YOUR BUSINESS TO EACH OF THE FOLLOWING PLATFORMS FOR AD SPENDING?**

\*Posed to ad execs whose clients have paid campaigns with each of the following platforms



**OF CLIENT SPENDING ON FACEBOOK, WHAT PERCENTAGE IS ON INSTAGRAM?**

\*Posed to ad execs whose clients have paid campaigns with Facebook

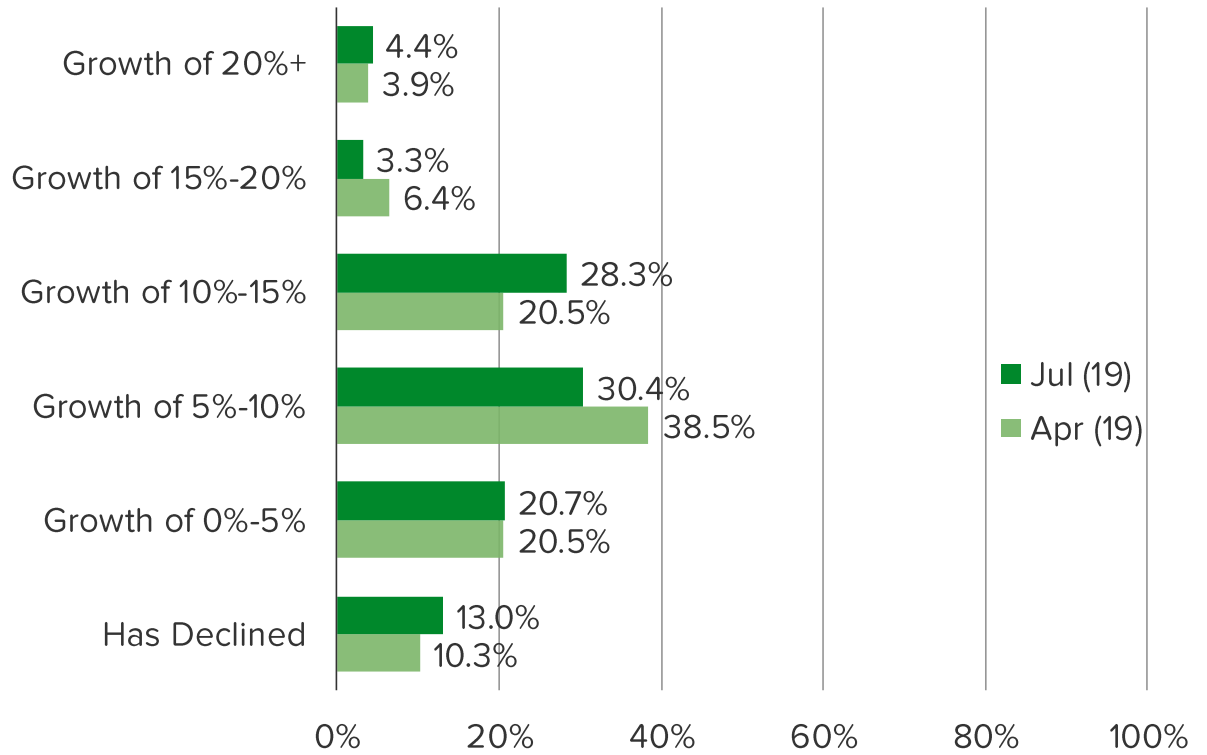




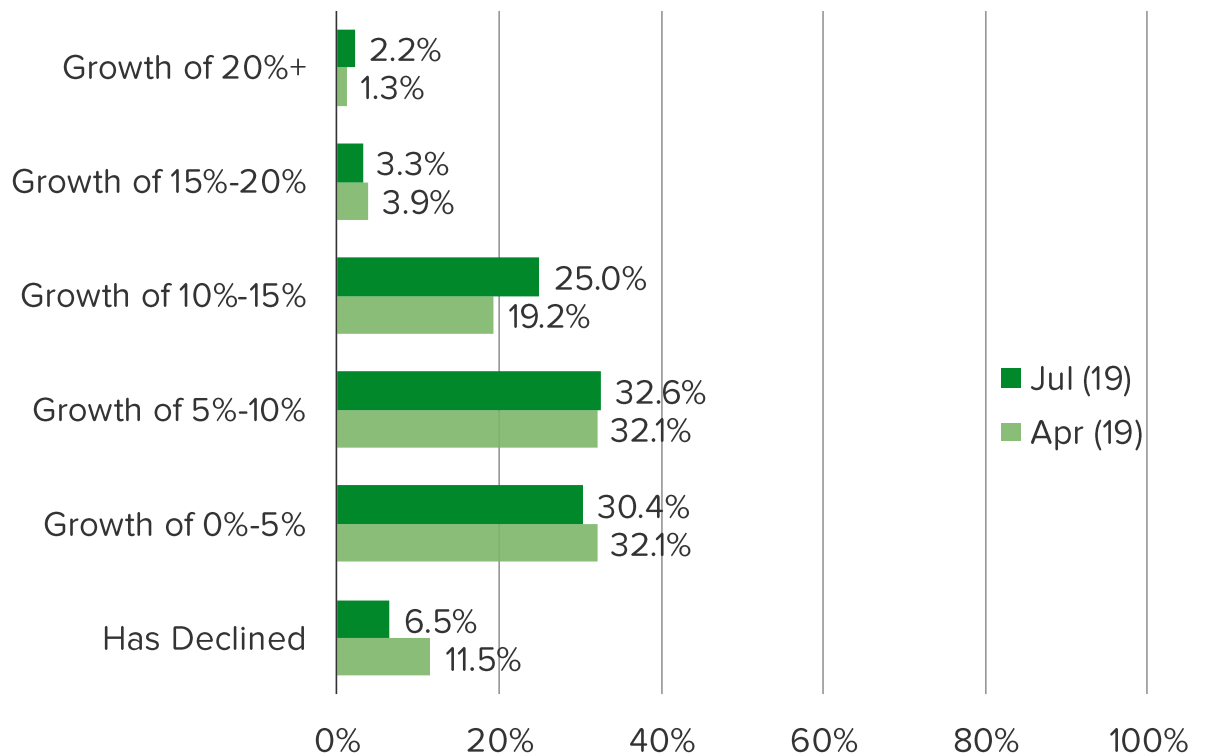
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

\*Posed to ad execs whose clients have paid campaigns with Facebook

FACEBOOK CORE AD SPENDING

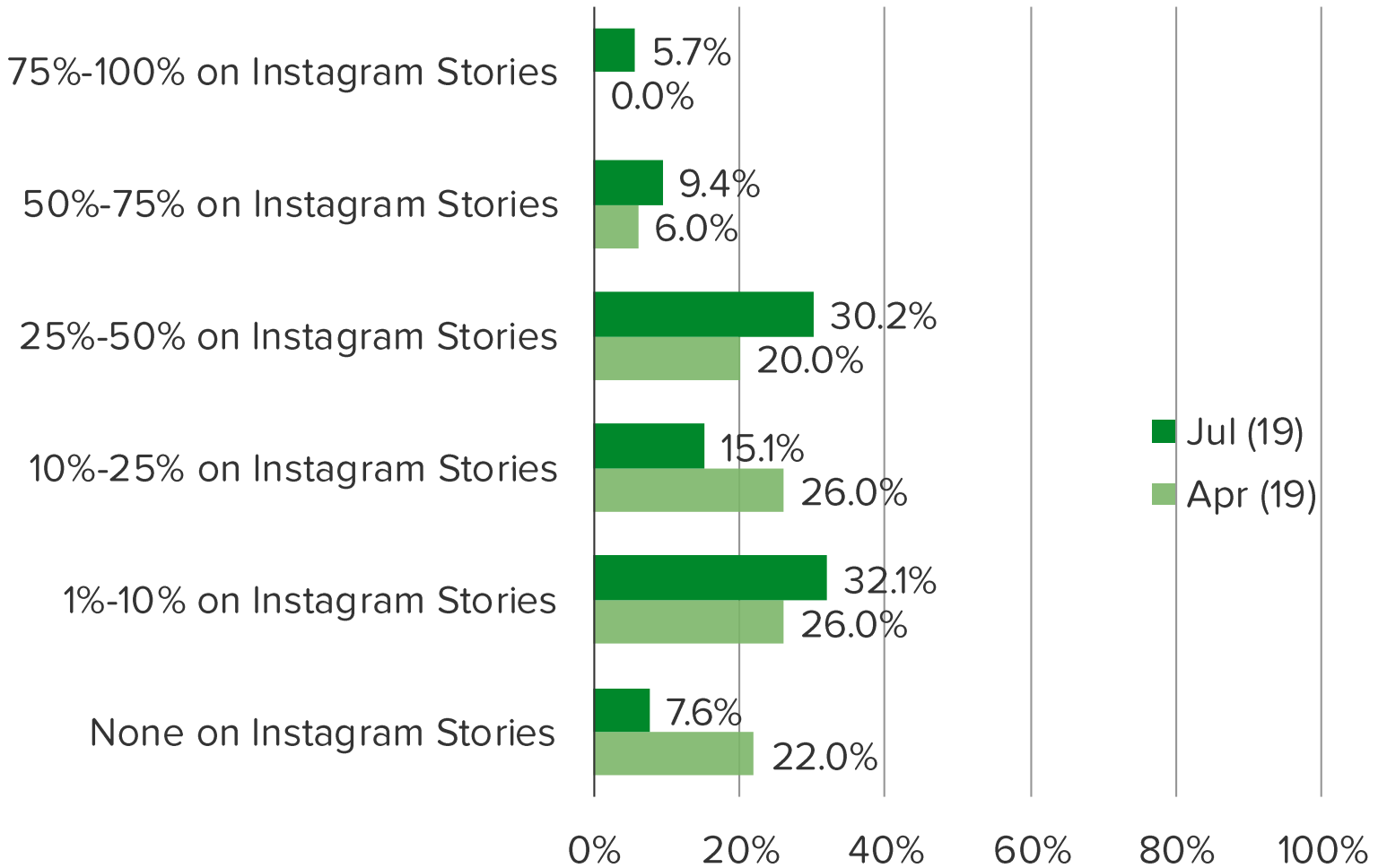


FACEBOOK CORE AD PRICING



**OF CLIENT SPENDING ON INSTAGRAM, WHAT PERCENTAGE IS ON INSTAGRAM STORIES?**

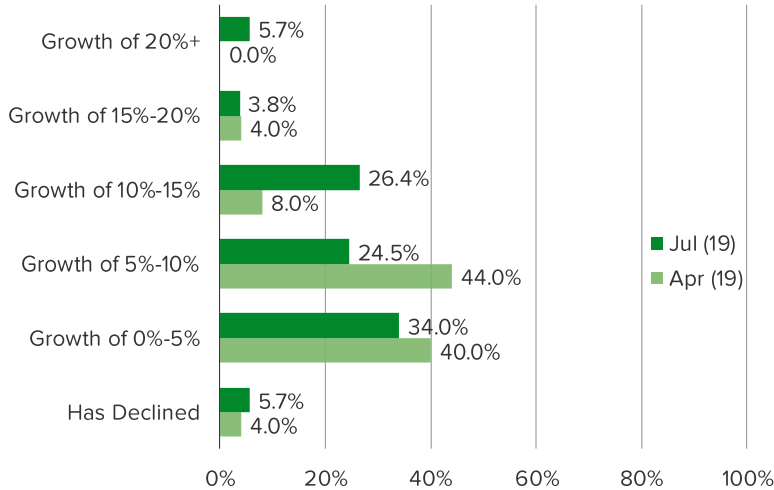
\*Posed to ad execs whose clients have paid campaigns with Facebook



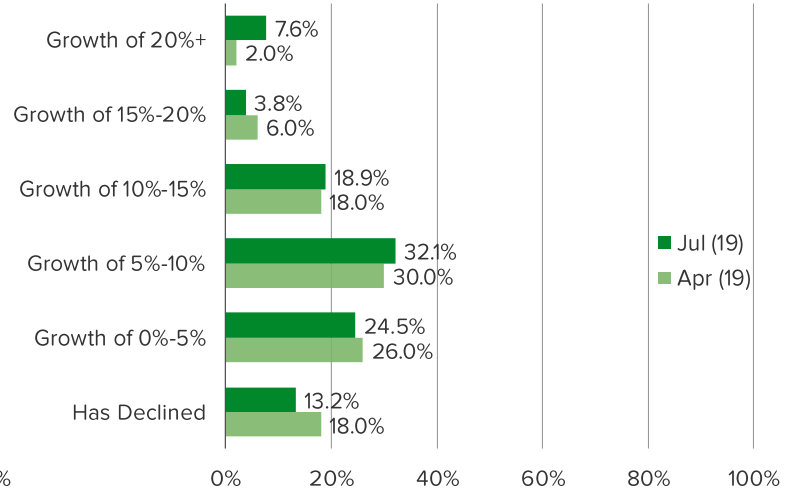
**PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...**

\*Posed to ad execs whose clients have paid campaigns with Instagram.

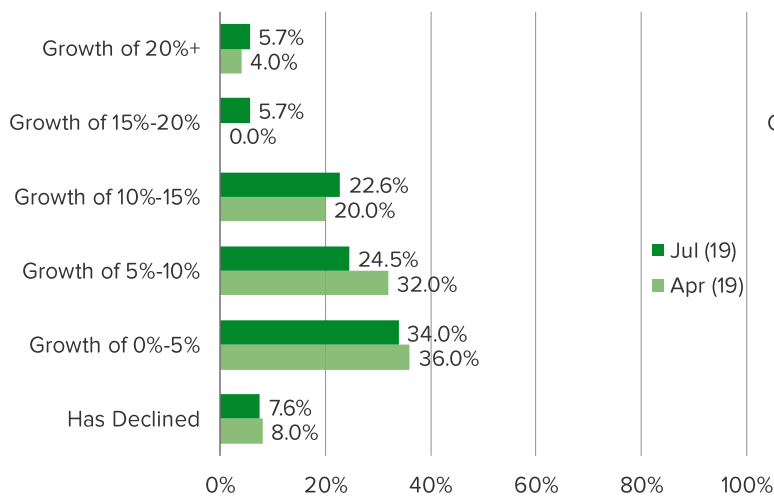
**INSTAGRAM NEWSFEED AD SPENDING**



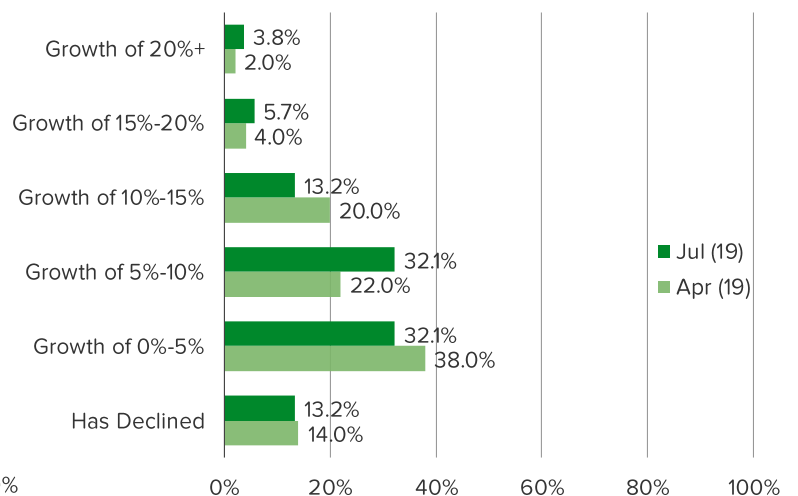
**INSTAGRAM STORIES AD SPENDING**



**INSTAGRAM NEWSFEED AD PRICING**

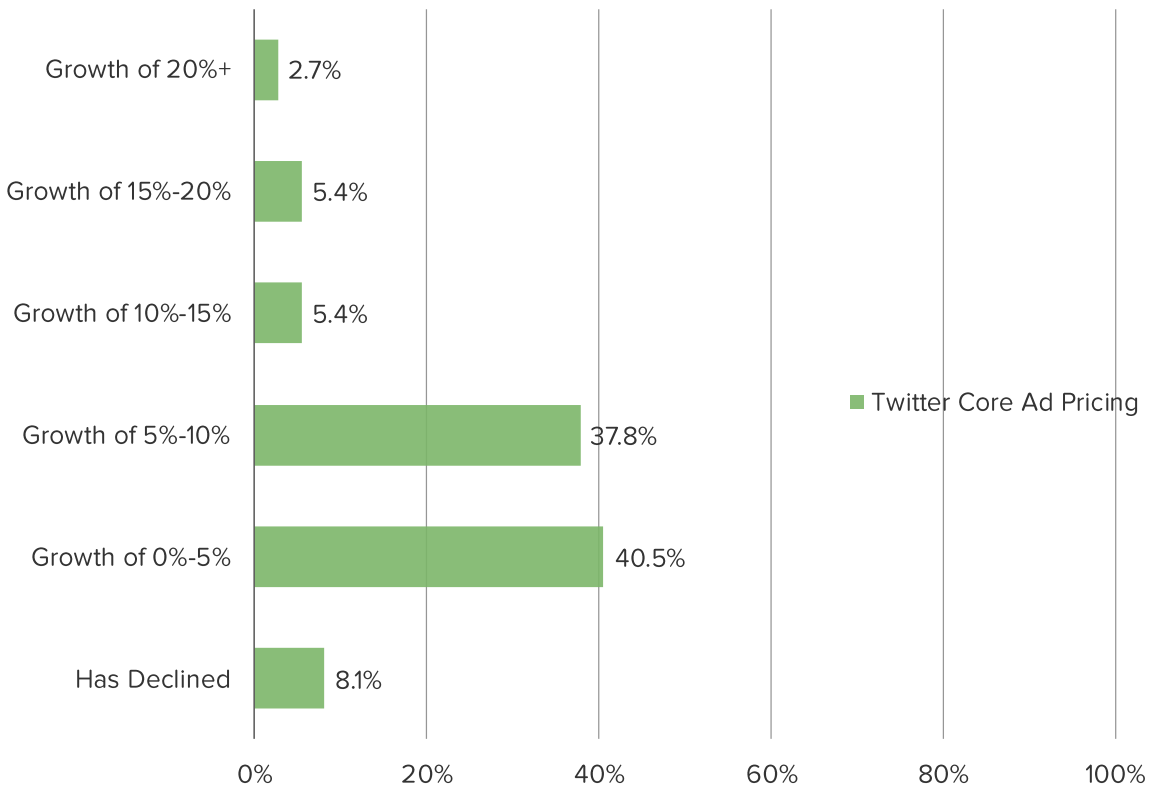
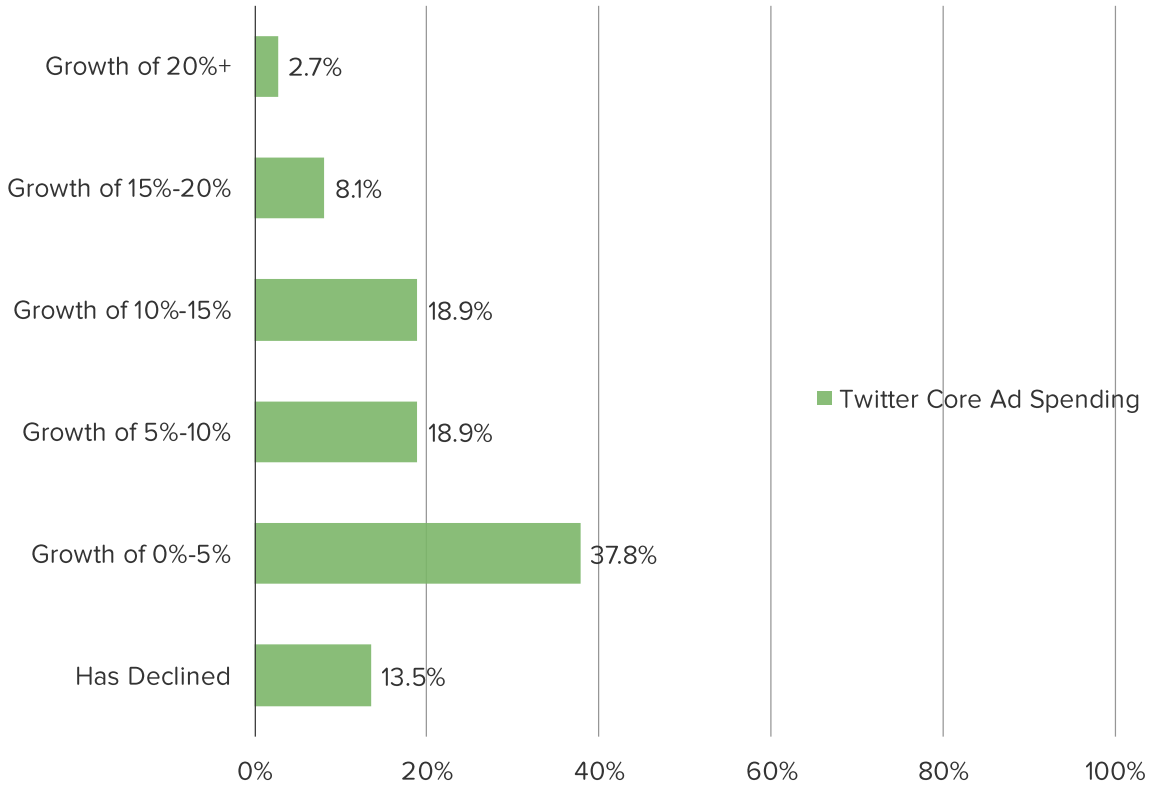


**INSTAGRAM STORIES AD PRICING**



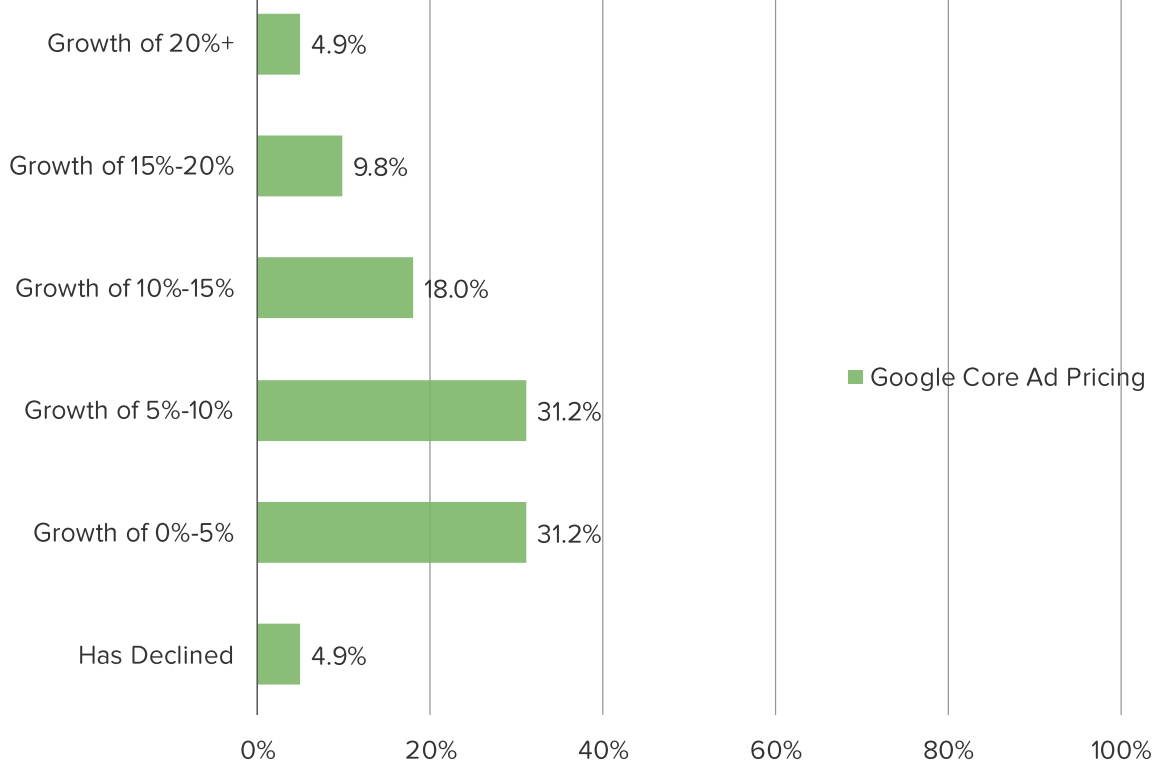
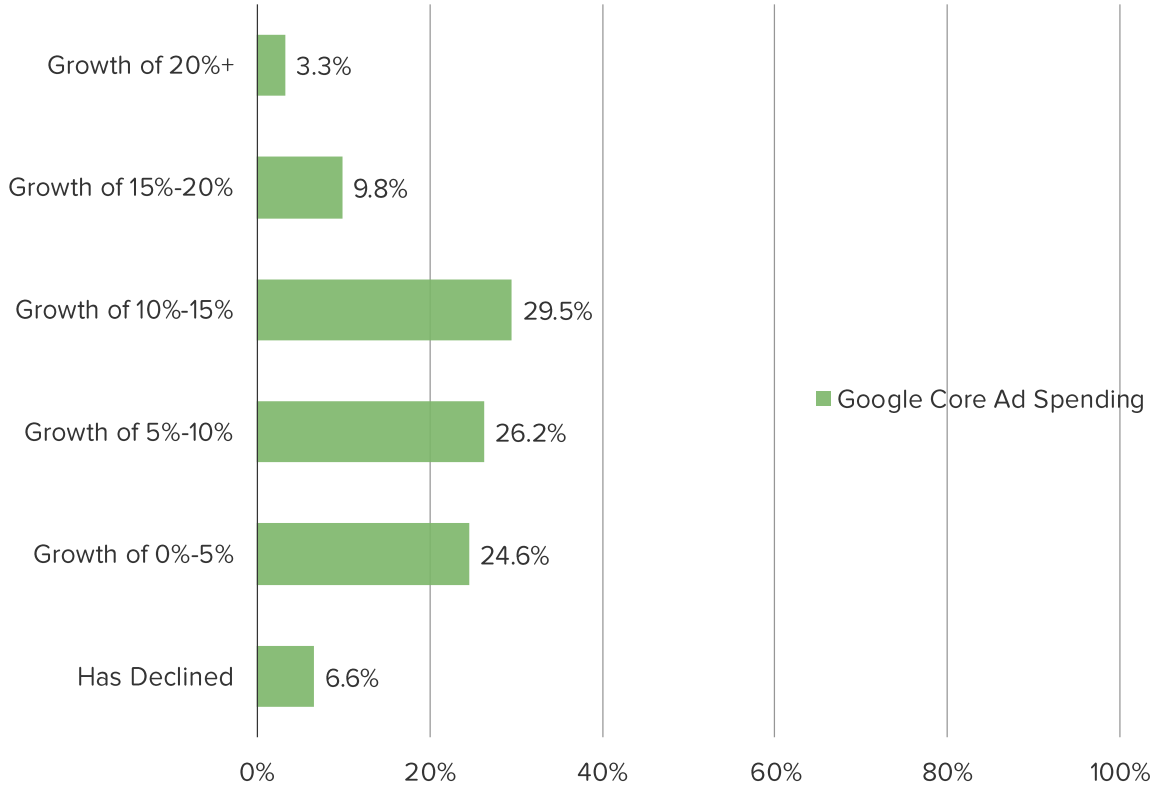
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

\*Posed to ad execs whose clients have paid campaigns with **Twitter**



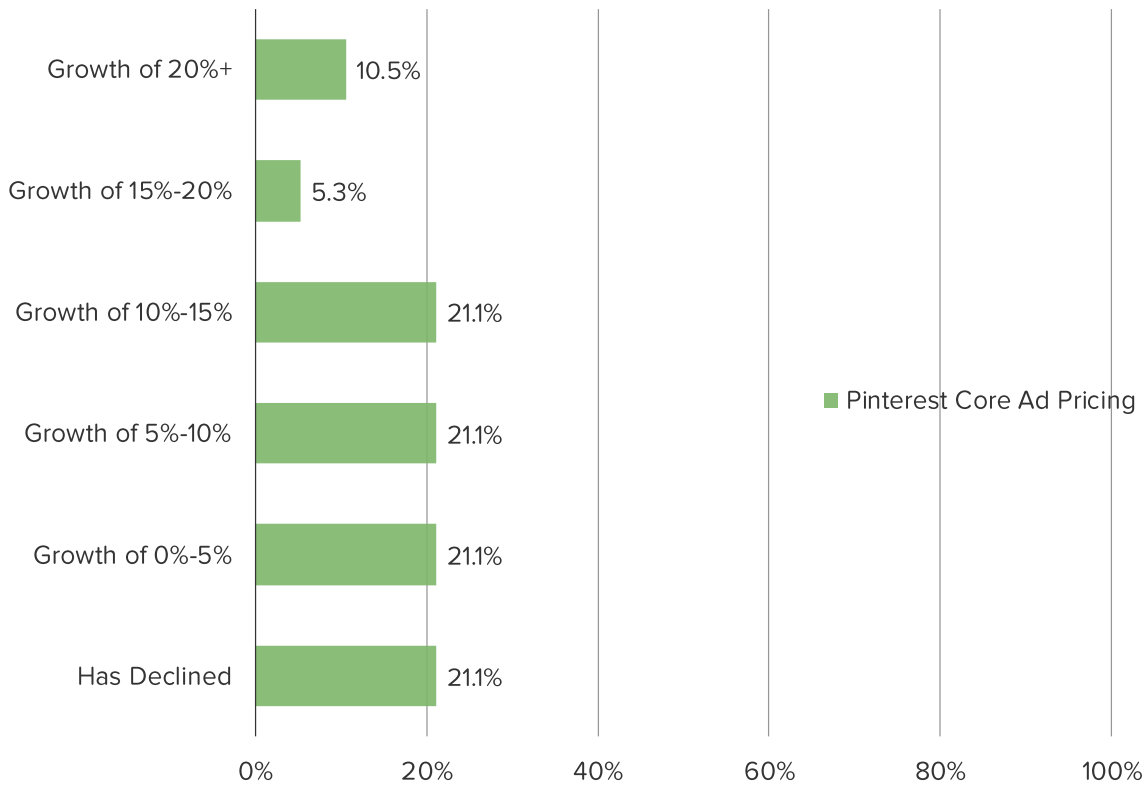
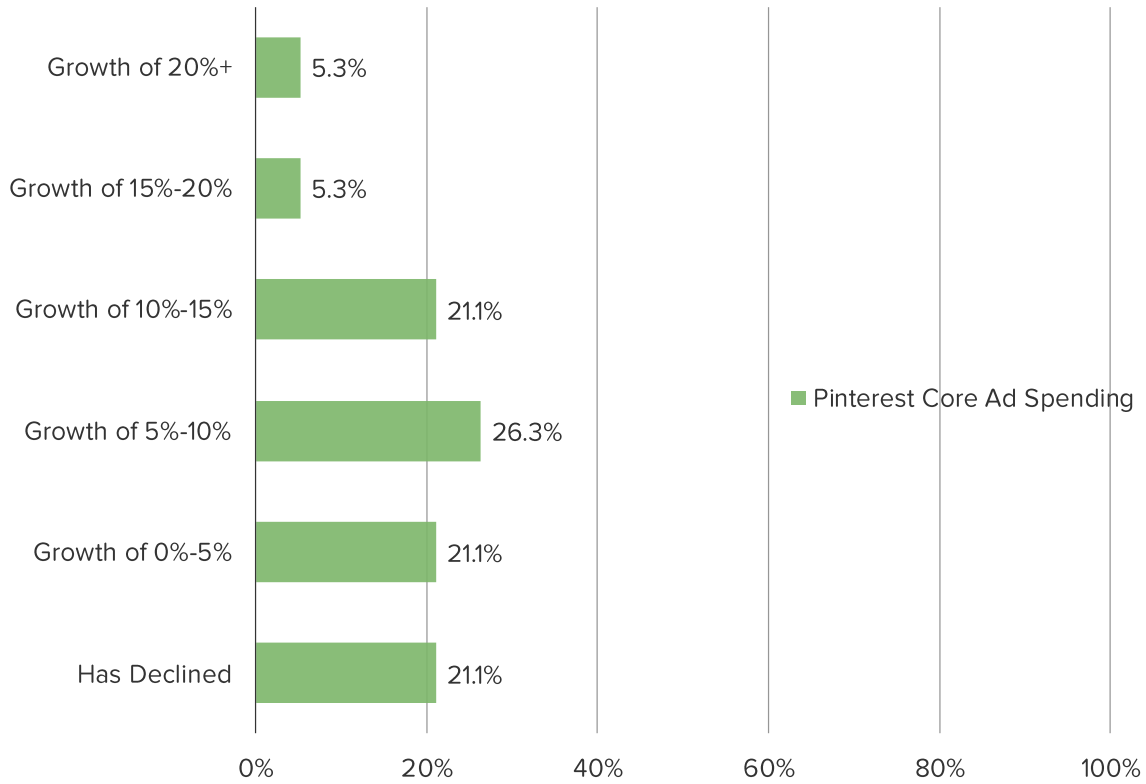
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

\*Posed to ad execs whose clients have paid campaigns with Google



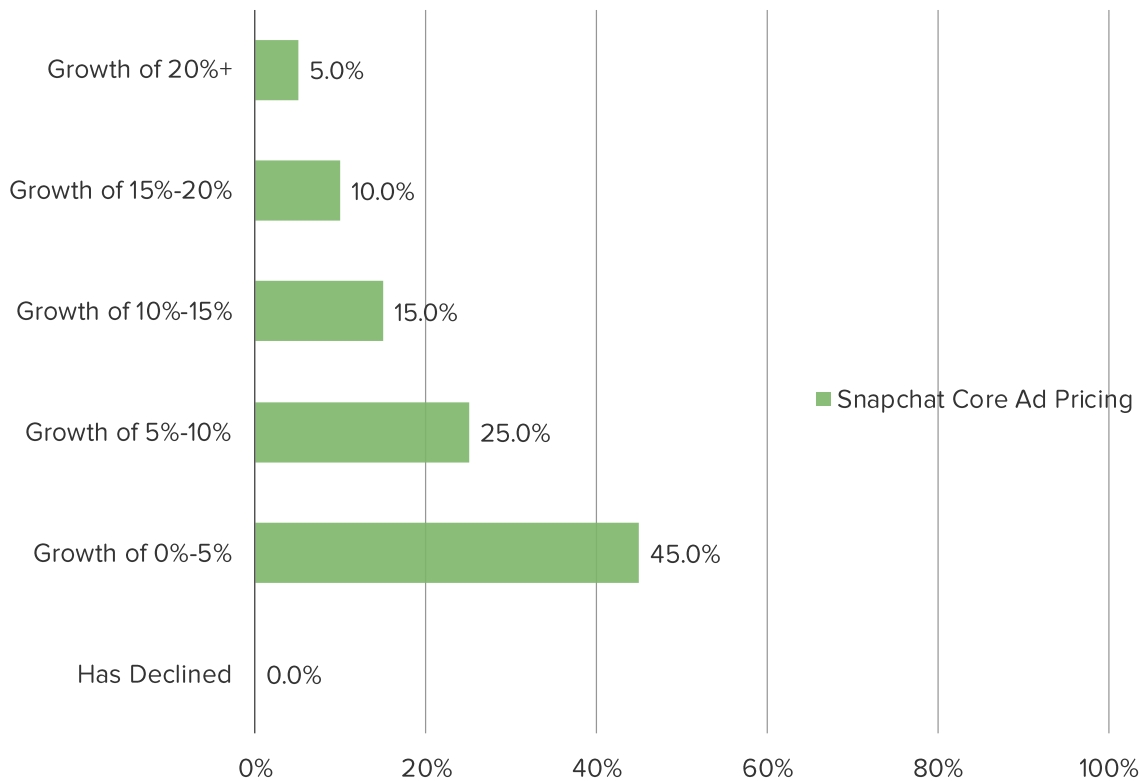
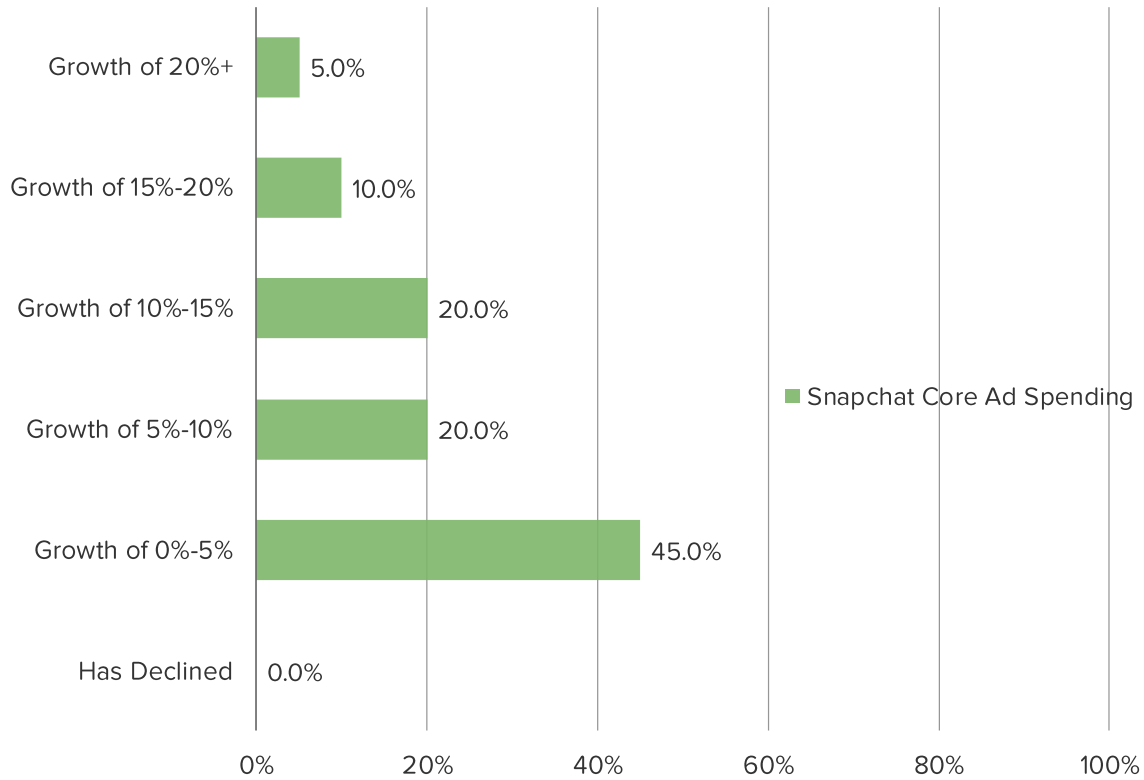
**PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...**

\*Posed to ad execs whose clients have paid campaigns with **Pinterest**



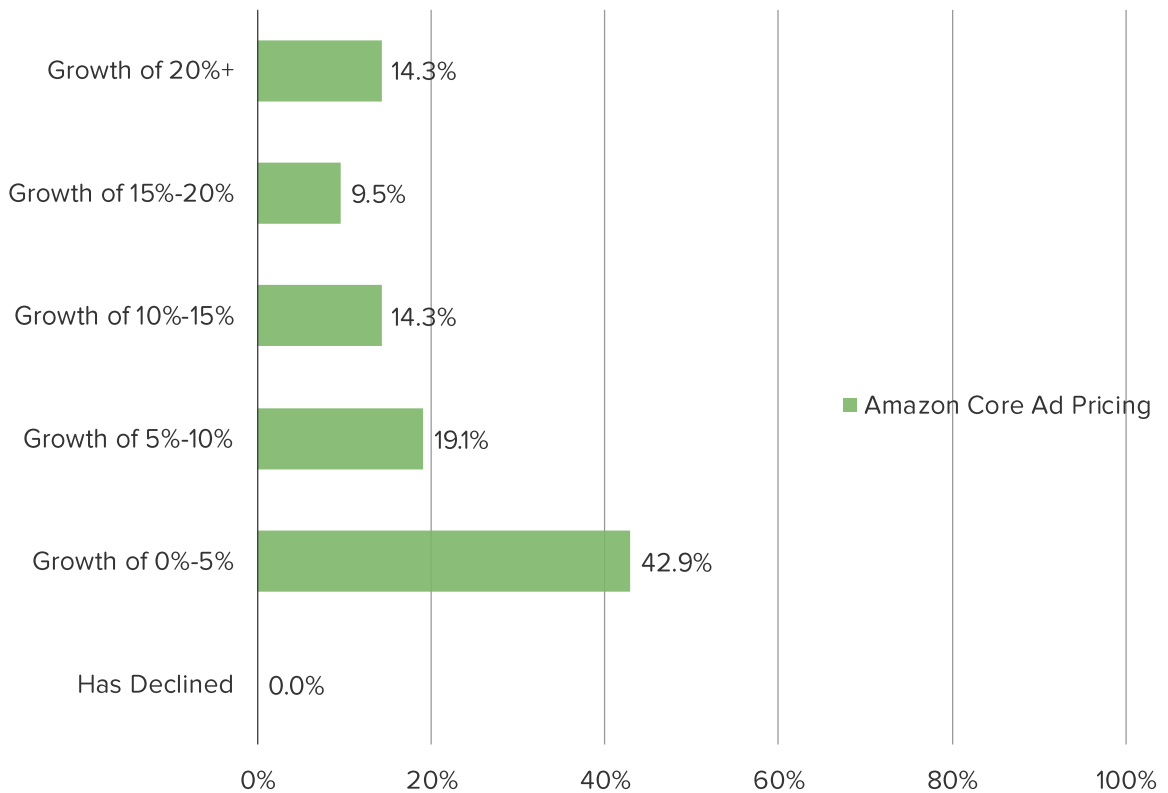
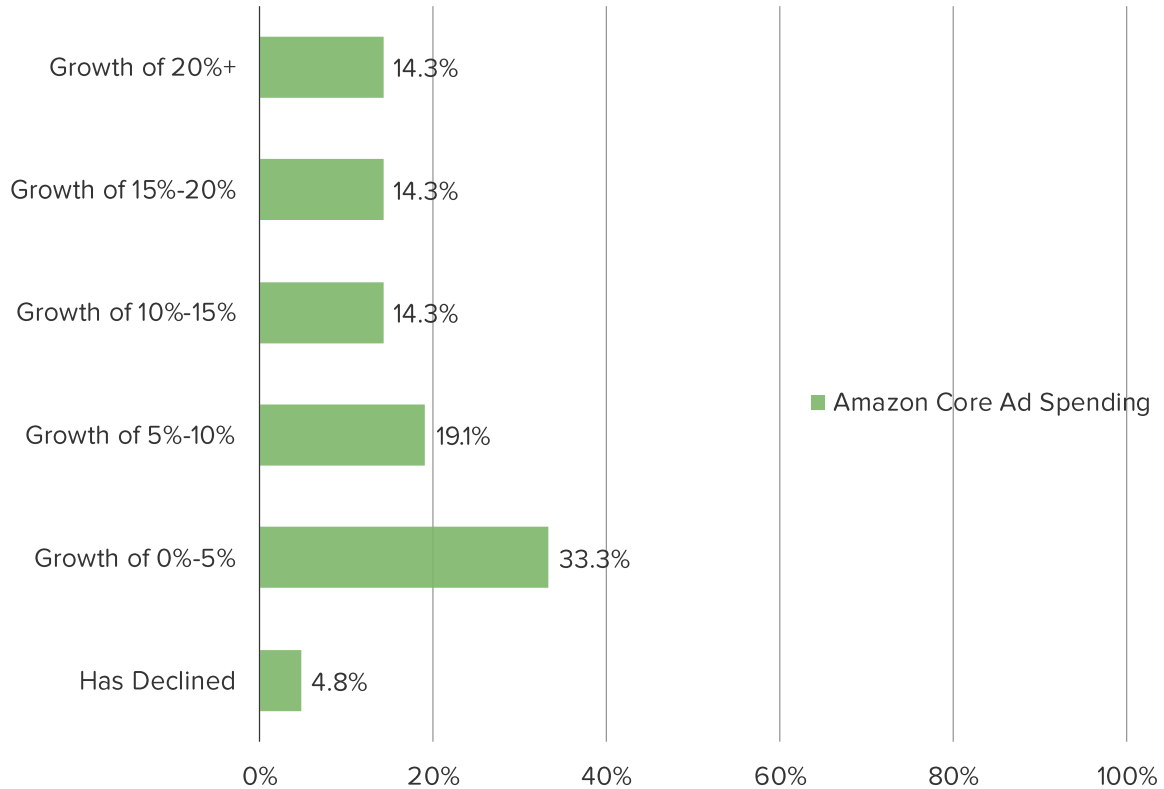
**PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...**

\*Posed to ad execs whose clients have paid campaigns with **Snapchat**



**PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...**

\*Posed to ad execs whose clients have paid campaigns with Amazon

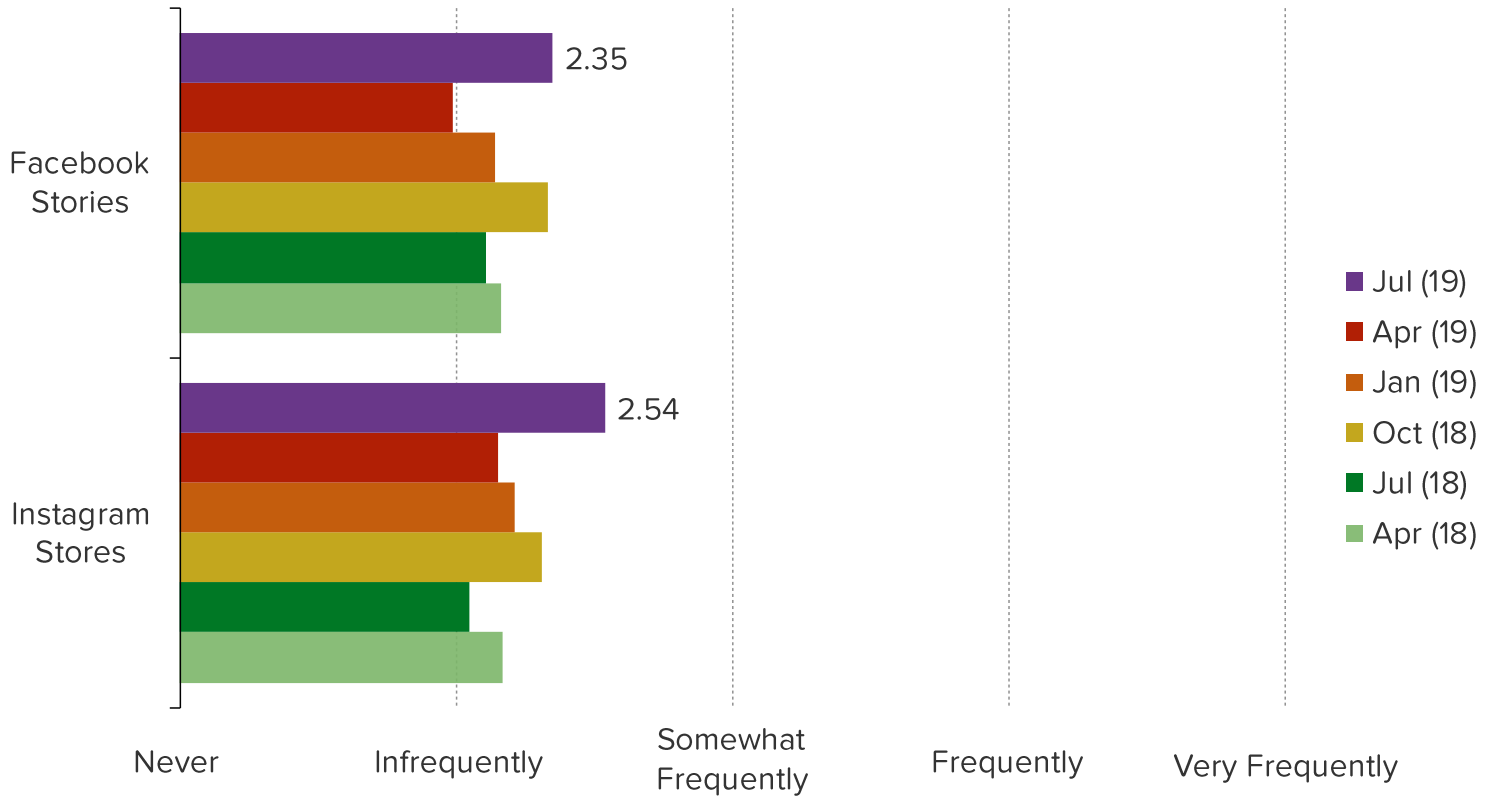




## FB SPECIFIC INITIATIVES

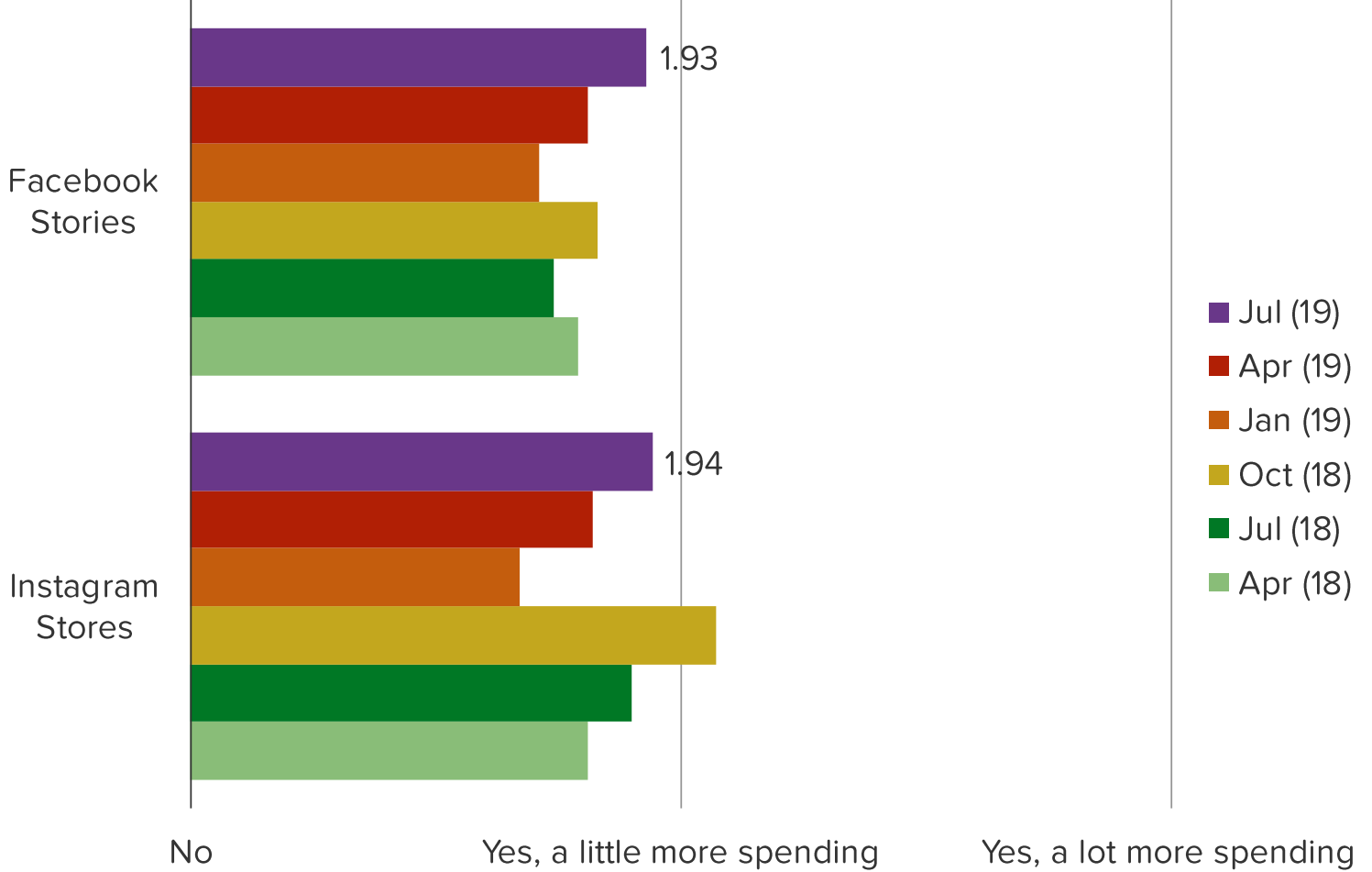
**DO YOUR CLIENTS USE FACEBOOK OR INSTAGRAM STORIES TO ADVERTISE?**

This question was posed to the target audience.



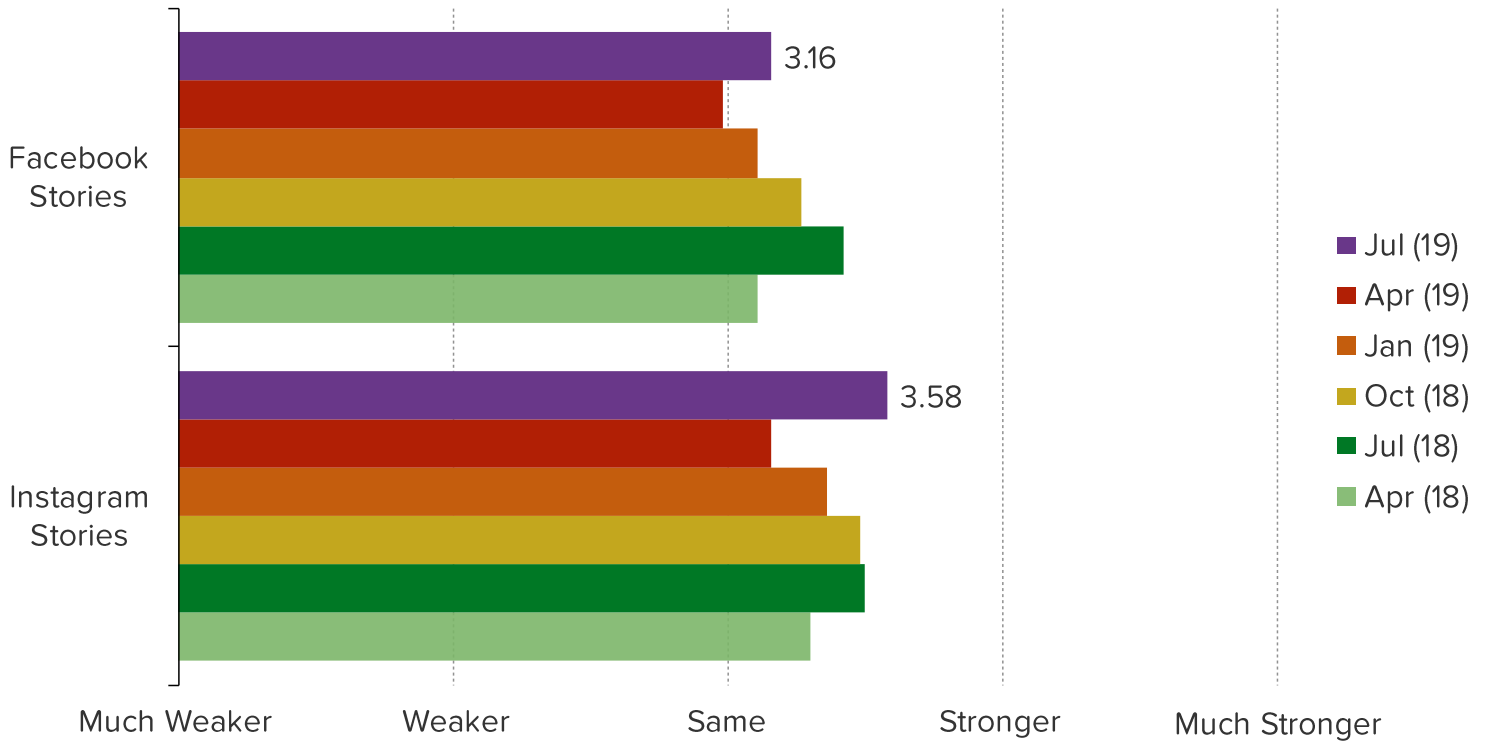
**HAS CLIENT USAGE OF STORIES INCREASED AD SPENDING WITH THE PLATFORM IN GENERAL?**

This question was posed to respondents who use Stories at least somewhat frequently.



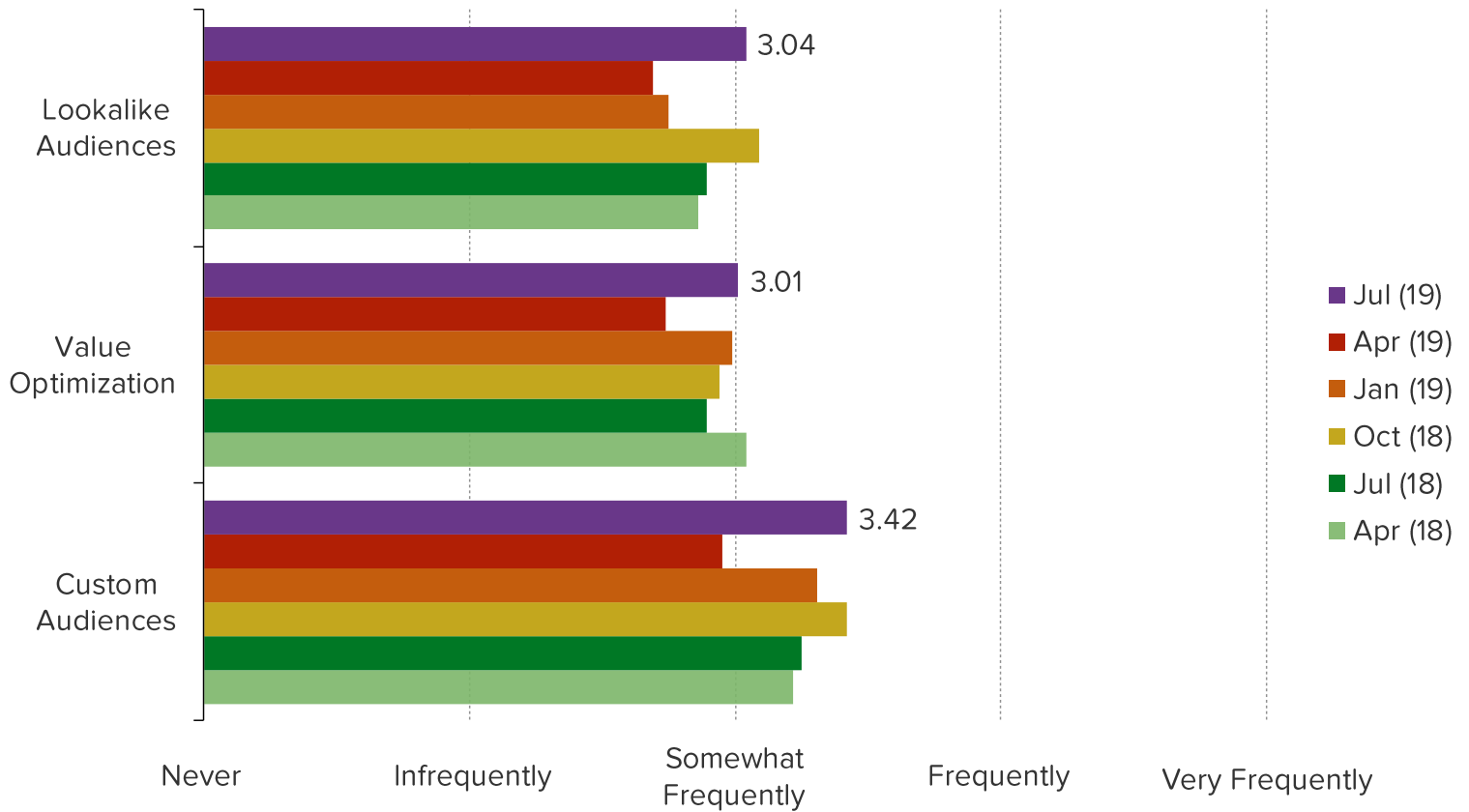
**COMPARED TO A YEAR AGO, HOW HAS DEMAND FOR INSTAGRAM STORIES AND FACEBOOK STORIES CHANGED?**

This question was posed to the target audience.



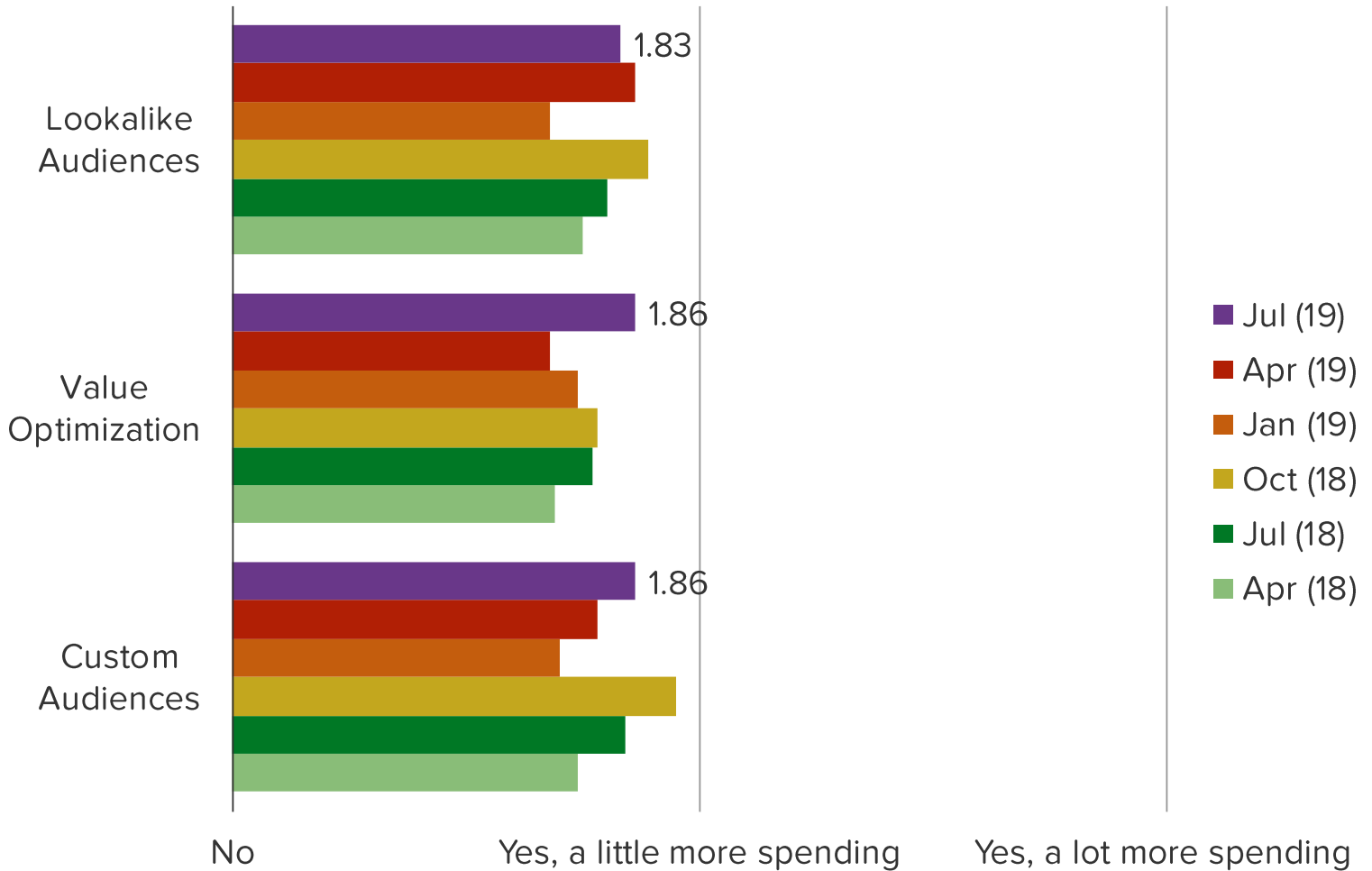
**HOW OFTEN DO YOUR CLIENTS USE THE FOLLOWING FACEBOOK ADVERTISING FEATURES?**

This question was posed to the target audience.



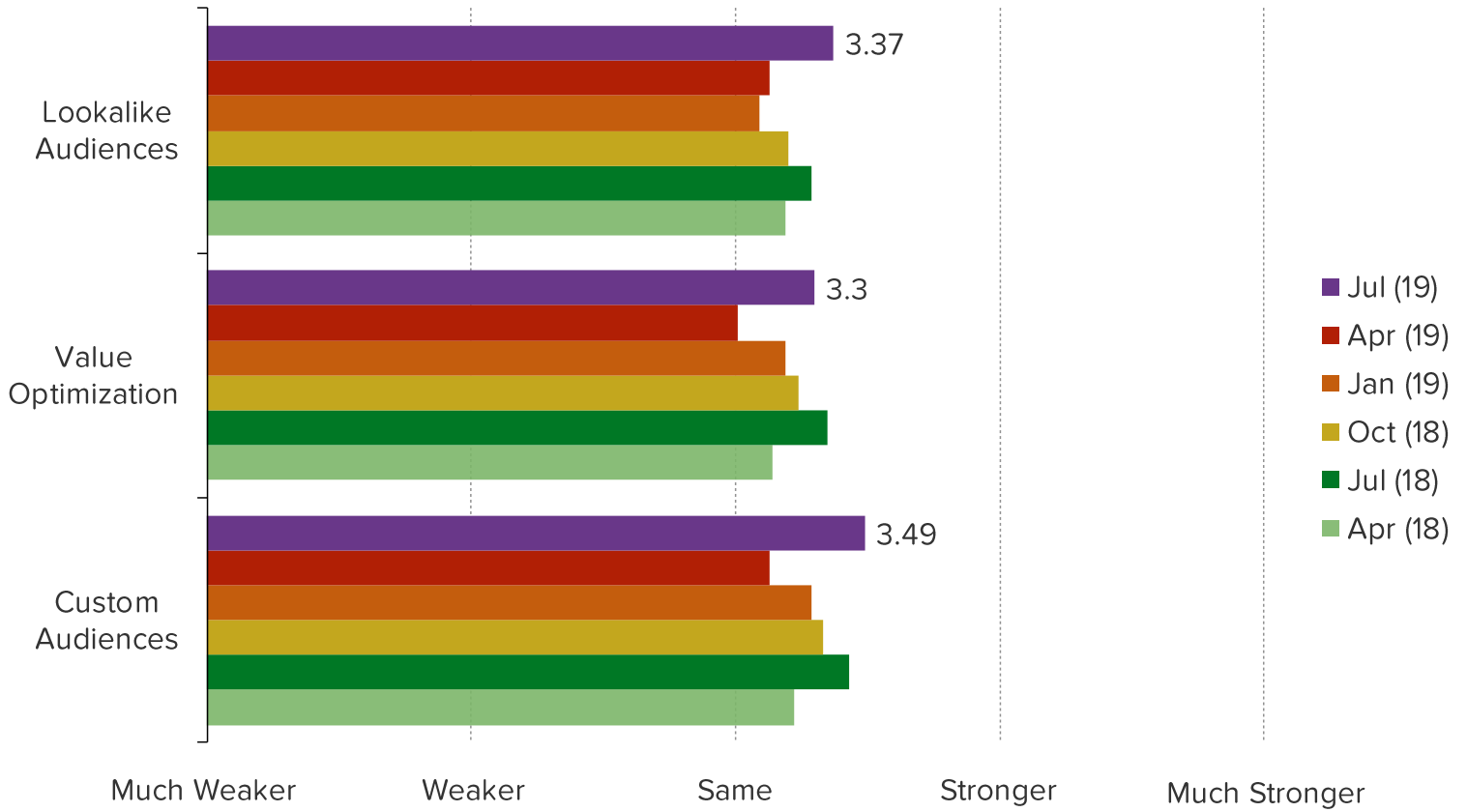
**HAS CLIENT USAGE OF THESE FACEBOOK ADVERTISING FEATURES GENERATED AN INCREASE IN FACEBOOK ADVERTISING SPEND IN GENERAL?**

This question was posed to respondents who use Stories at least somewhat frequently.



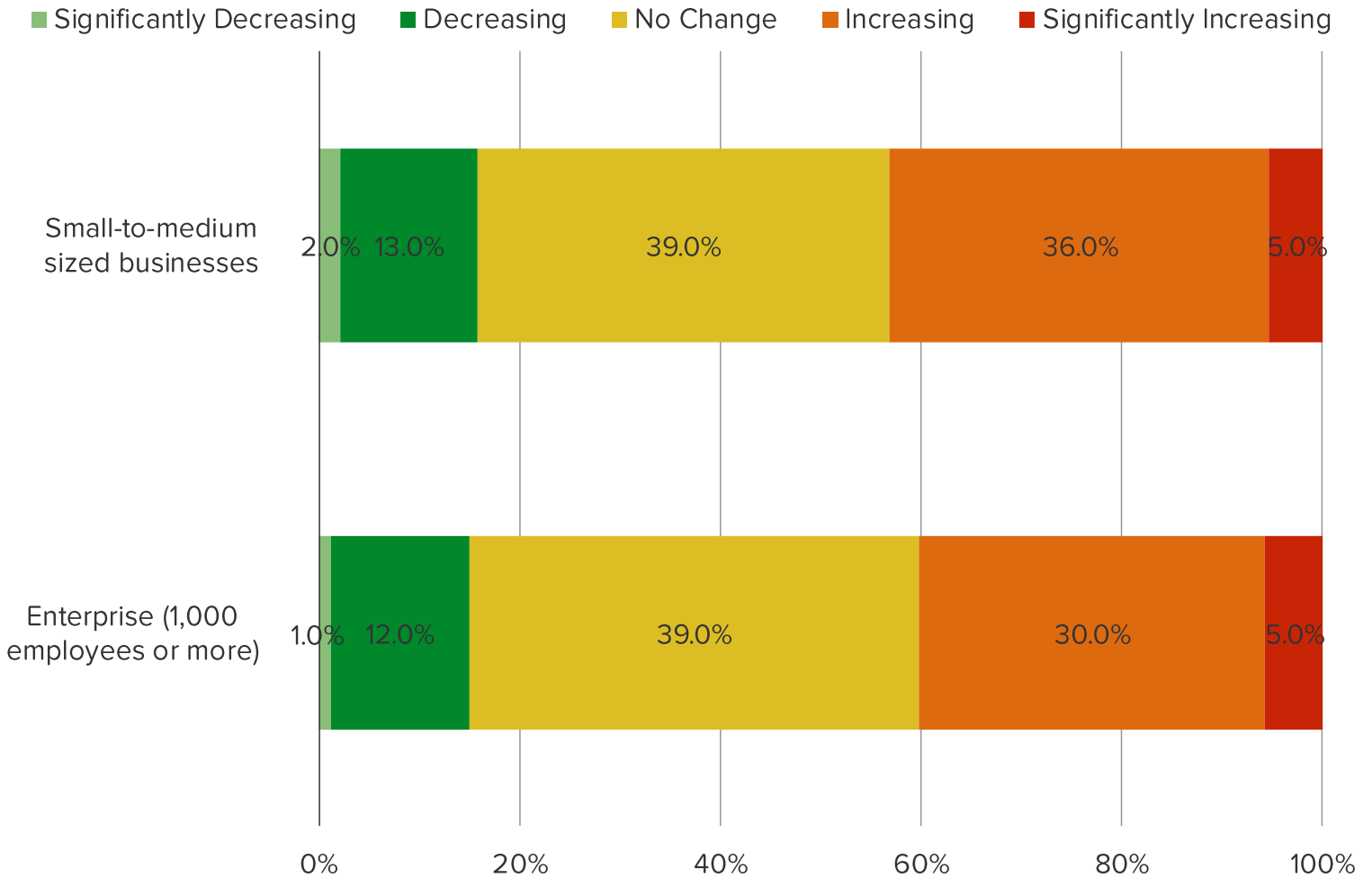
**COMPARED TO A YEAR AGO, HAS CLIENT DEMAND FOR THE FOLLOWING FACEBOOK ADVERTISING FEATURES CHANGED?**

This question was posed to the target audience.



**HAVE THE FOLLOWING CLIENT TYPES BEEN INCREASING OR DECREASING THEIR SPENDING ON FACEBOOK ADVERTISING?**

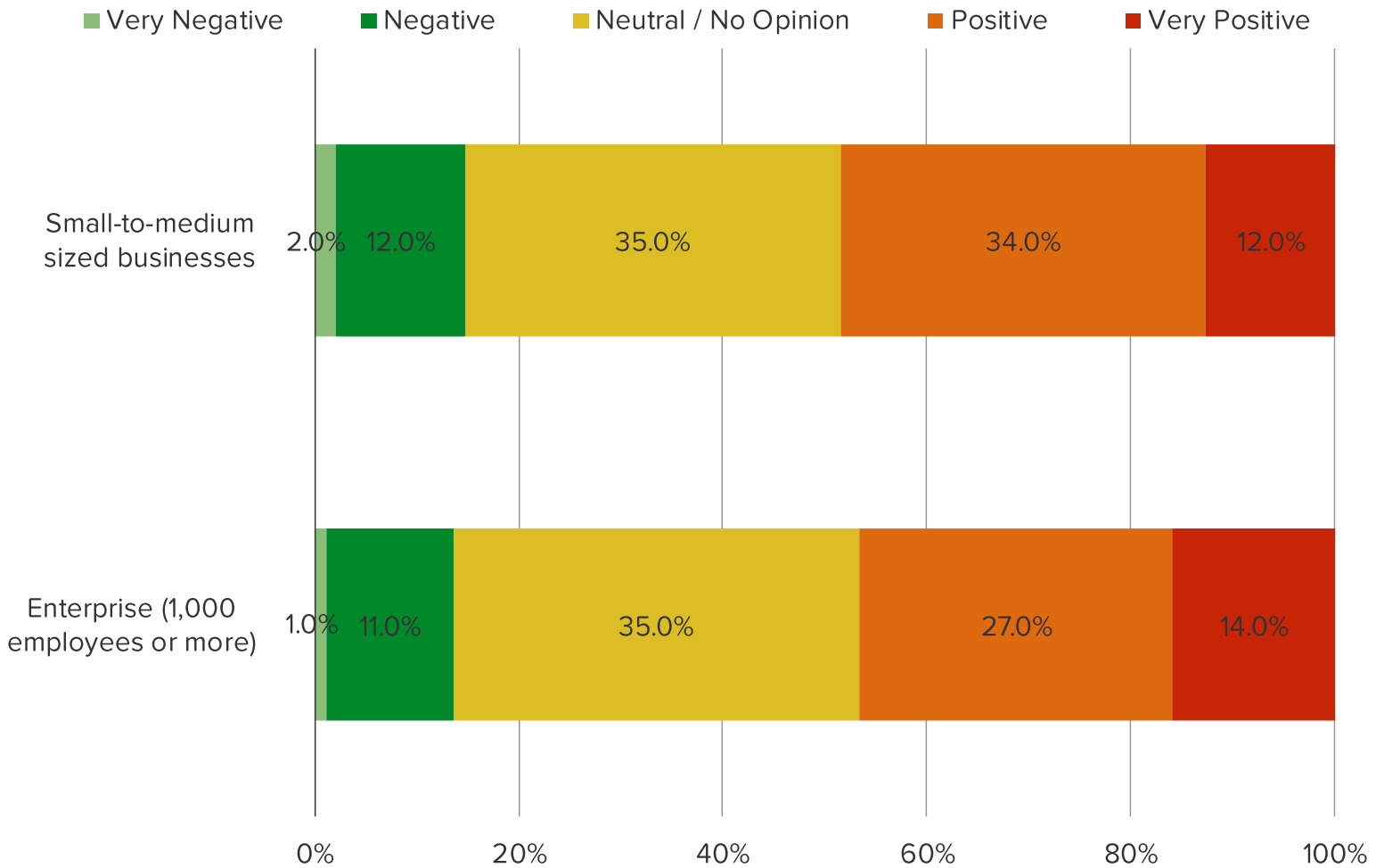
This question was posed to the target audience.





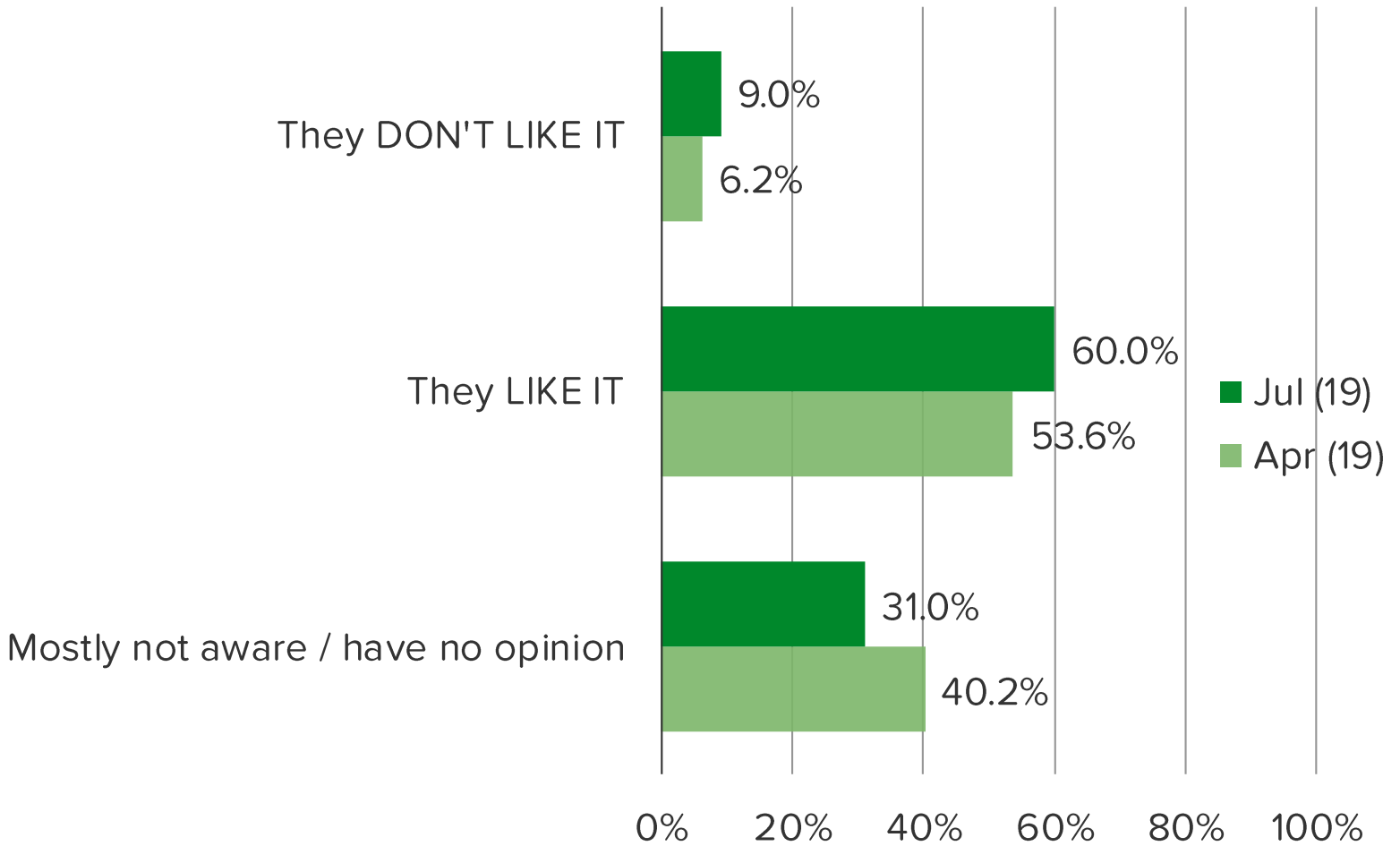
**DO THE FOLLOWING CLIENT TYPES HAVE A POSITIVE OR NEGATIVE OPINION OF FACEBOOK?**

This question was posed to the target audience.



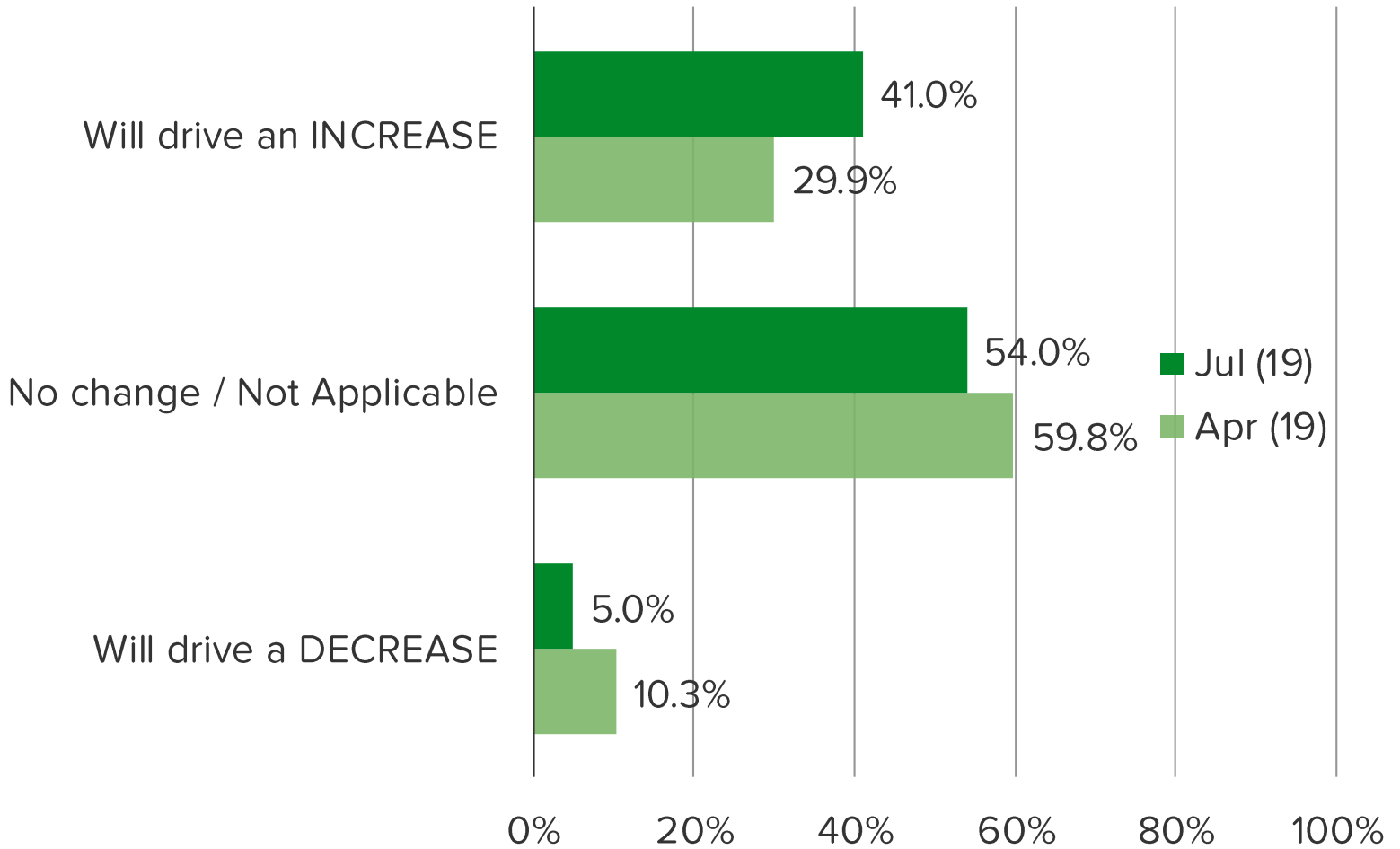
**WHAT ARE CLIENTS' VIEWS OF INSTAGRAM NOW ALLOWING BRANDS TO SELL PRODUCTS THEY ADVERTISE WITHOUT HAVING USERS LEAVE INSTAGRAM?**

This question was posed to the target audience.



**WILL THE FACT THAT INSTAGRAM NOW ALLOWS USERS TO CHECKOUT AND BUY ADVERTISED PRODUCTS WITHOUT LEAVING THE APP CHANGE HOW MUCH CLIENTS SPEND TO ADVERTISE ON INSTAGRAM?**

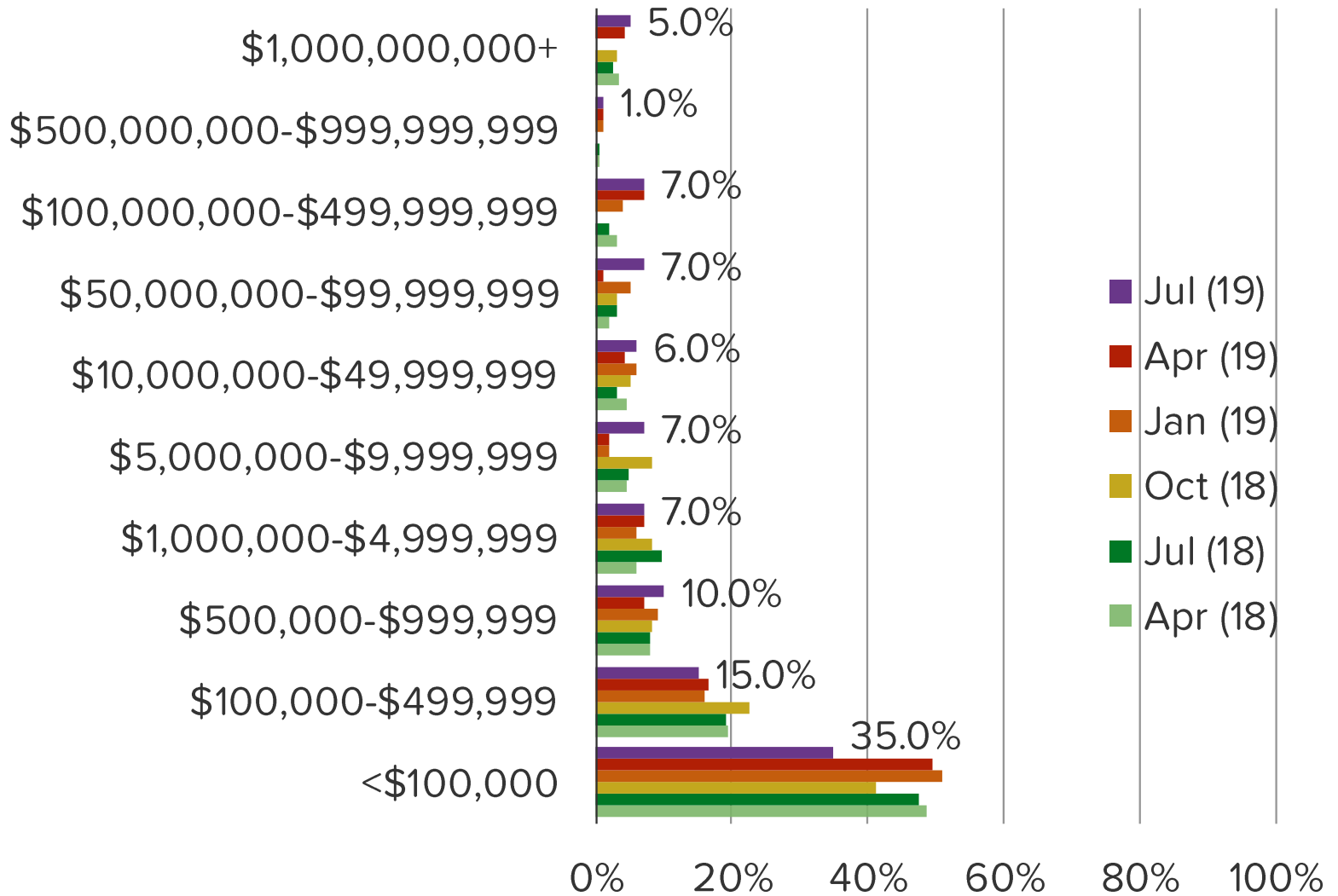
This question was posed to the target audience.



## BACKGROUND INFO

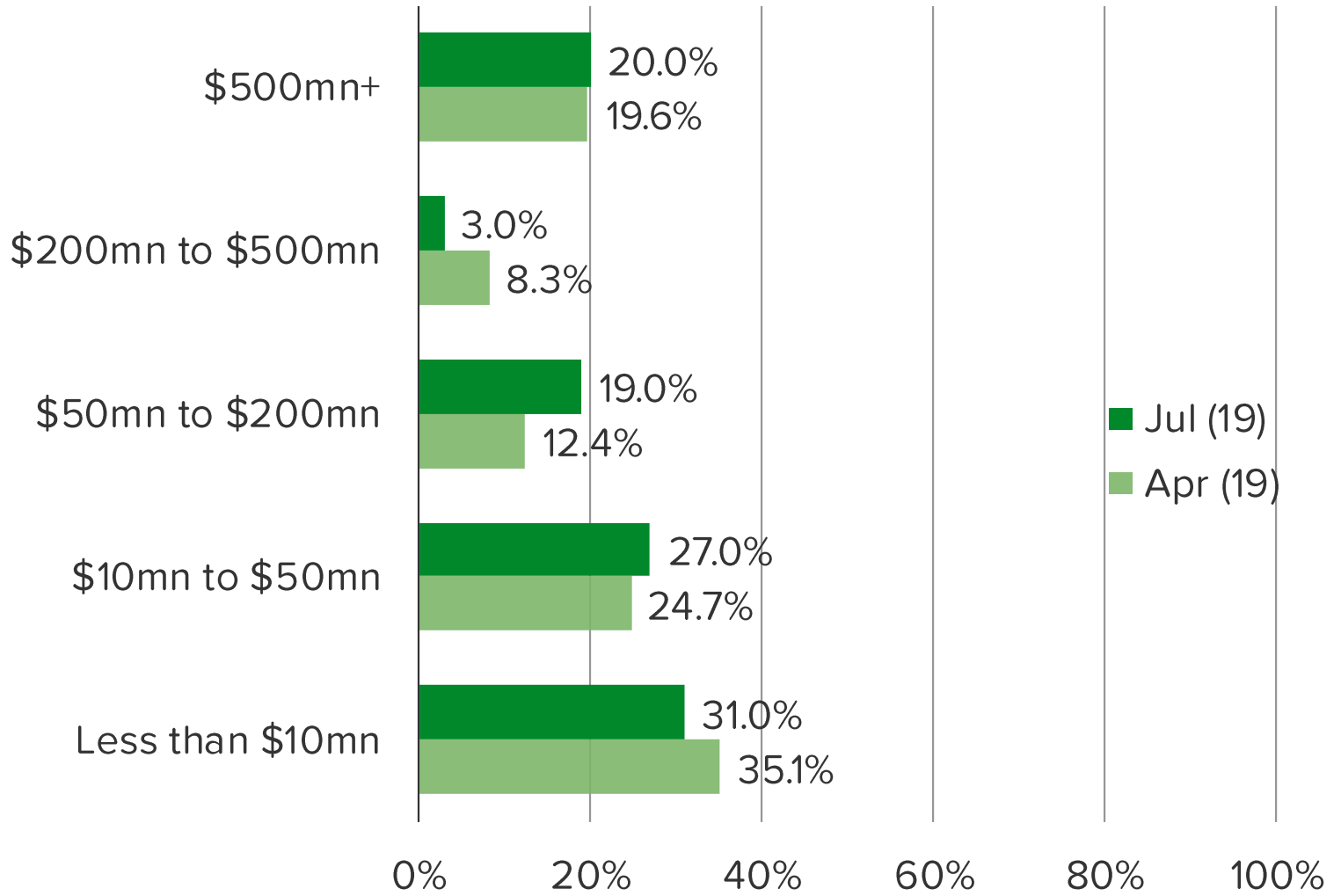
**PLEASE PROVIDE AN ESTIMATE OF THE AMOUNT THAT ALL OF YOUR CLIENTS SPEND ON SOCIAL MEDIA / INTERNET ADVERTISING ON AN ANNUAL BASIS.**

This question was posed to advertising executives.



**APPROXIMATELY HOW LARGE IS YOUR COMPANY IN TERMS OF ANNUAL REVENUE?**

This question was posed to advertising executives.



**WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CUSTOMER BASE?**

This question was posed to advertising executives.

