



CHECK BREAKDOWN:

TREND CHECKS

AD SPENDING TRENDS

Feedback toward ad spending broadly is mixed with the average respondent seeing spending as largely unchanged, which is slightly worse than aggregate feedback one quarter ago and slightly better than feedback one year ago. Feedback toward spending on social media platforms in our survey is net positive for most platforms, but slightly less positive relative to July results.

PLATFORM SENTIMENT TRENDS

Sentiment toward platforms is largely consistent with prior waves. Respondents continue to believe social media advertising will fare the best over the next 3-6 months. Paid search is second and has been receiving an increasing number of votes from respondents.

IOS PRIVACY FEEDBACK

On balance, more respondents expect the iOS privacy updates to be more of a negative than a positive for social platforms. The percentage who felt it will be a negative eased a bit q/q, but an increased percentage feel pricing/costs associated with social media advertising will go up as a result.

COVID CONCERNS FEEDBACK

Covid concerns are nearly fully resolved among respondents.

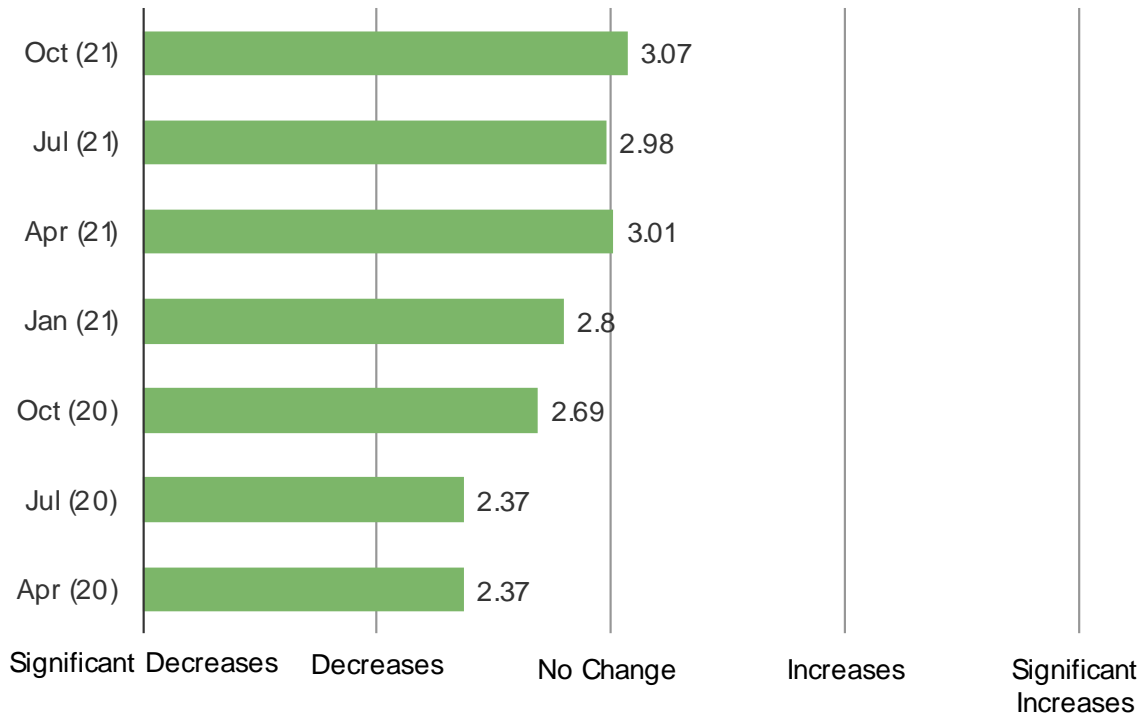
TIKTOK INTEREST INCREASING

Much like our consumer surveys, TikTok has been of increasing interest to respondents in our ad execs survey.

AD SPEND HEALTH

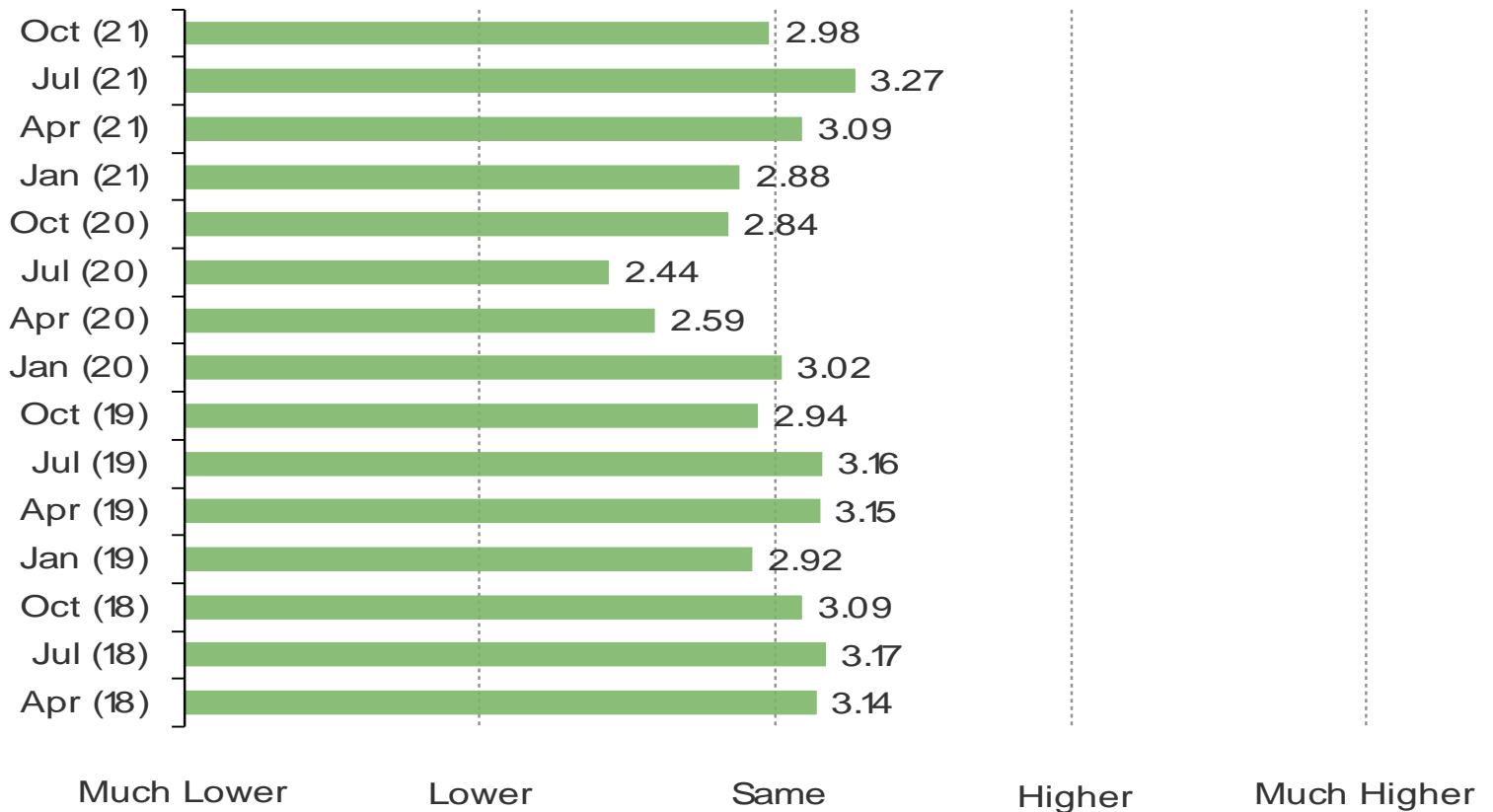
PLEASE DESCRIBE ADVERTISING BUDGETS COMPARED TO THE SAME TIME ONE YEAR AGO?

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.



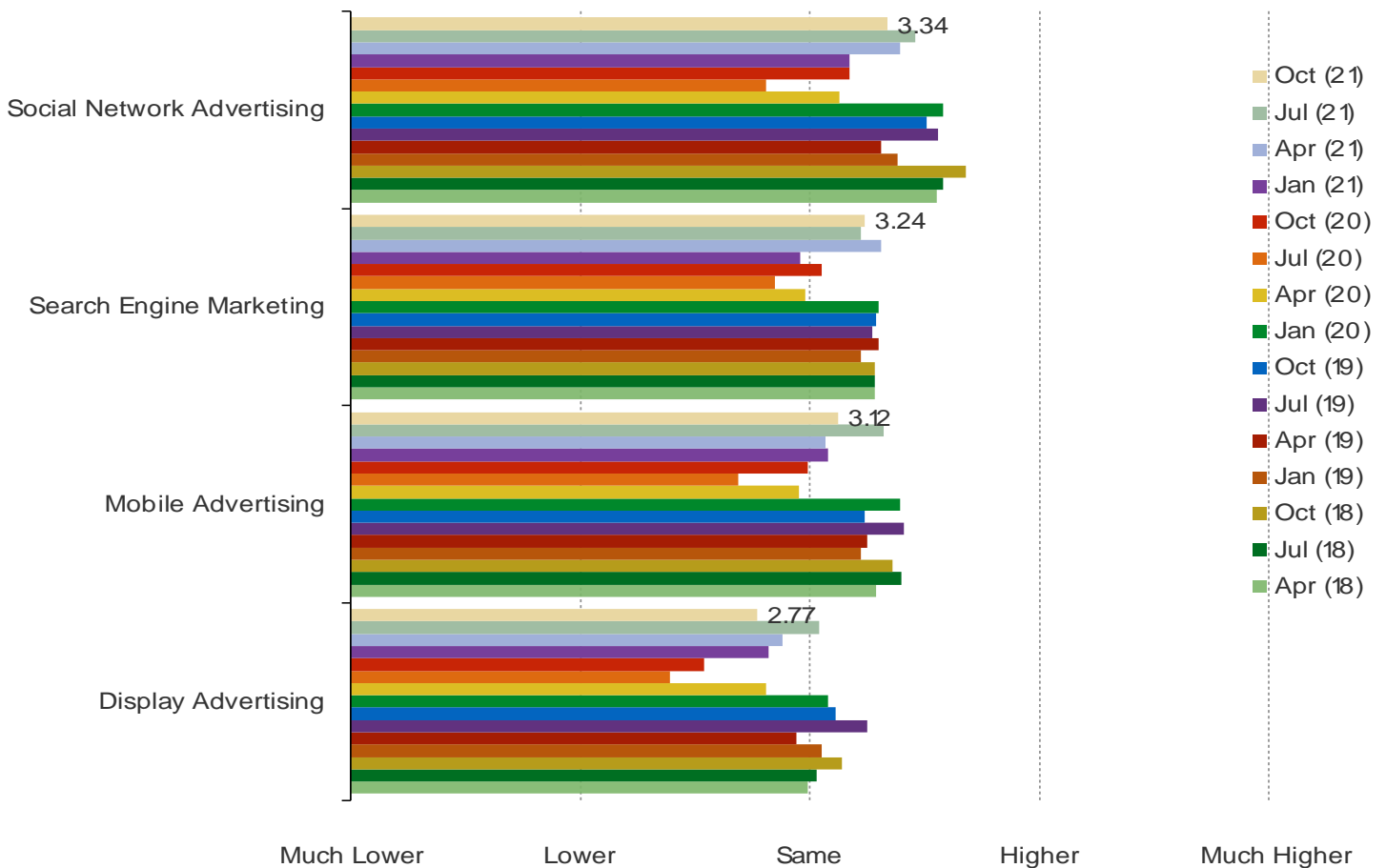
Making An Impression

Audience: 100 US Ad Execs

Date: October 2021

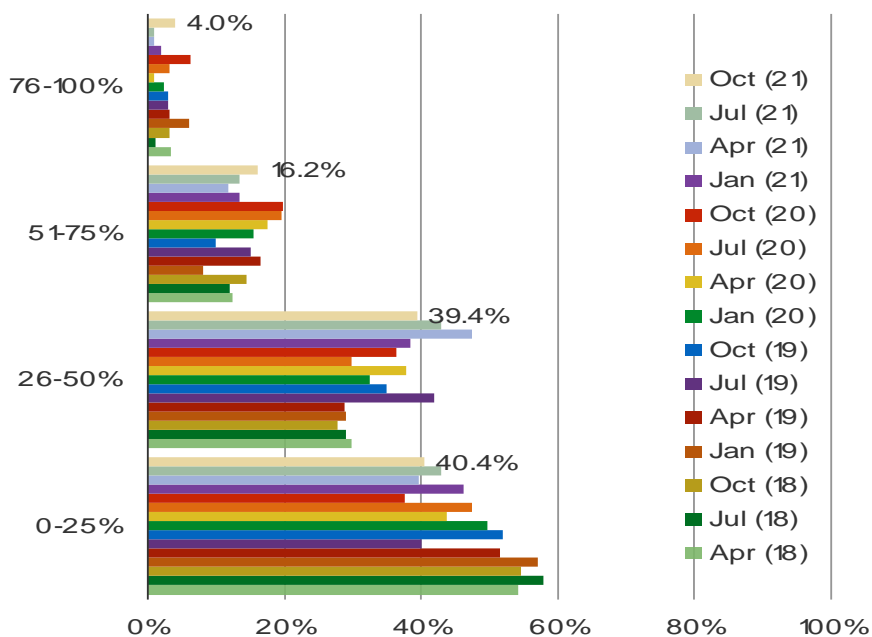
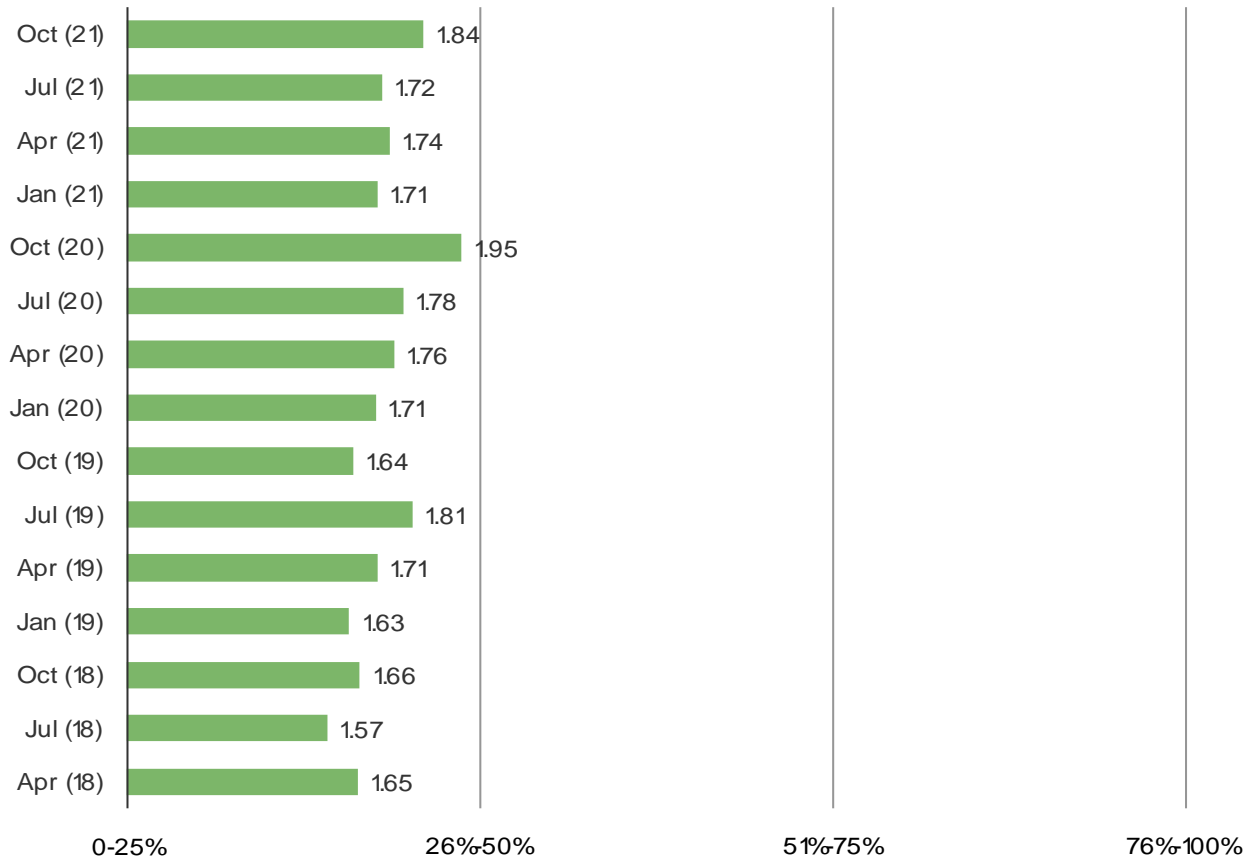
PLEASE COMPARE SPENDING ON EACH OF THE FOLLOWING ADVERTISING METHODS COMPARED TO ONE YEAR AGO.

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.

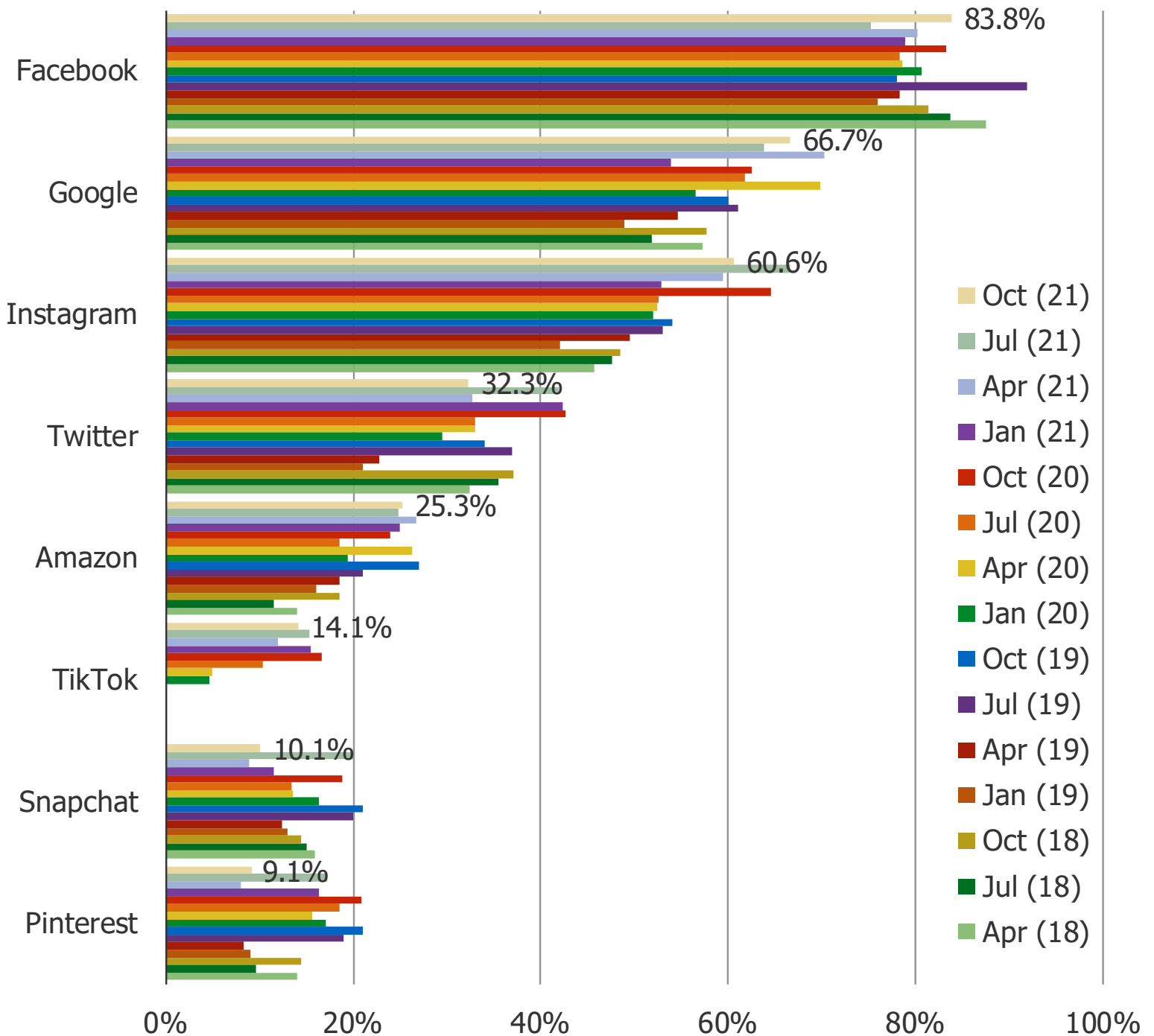


Making An Impression

MARKET SHARE

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

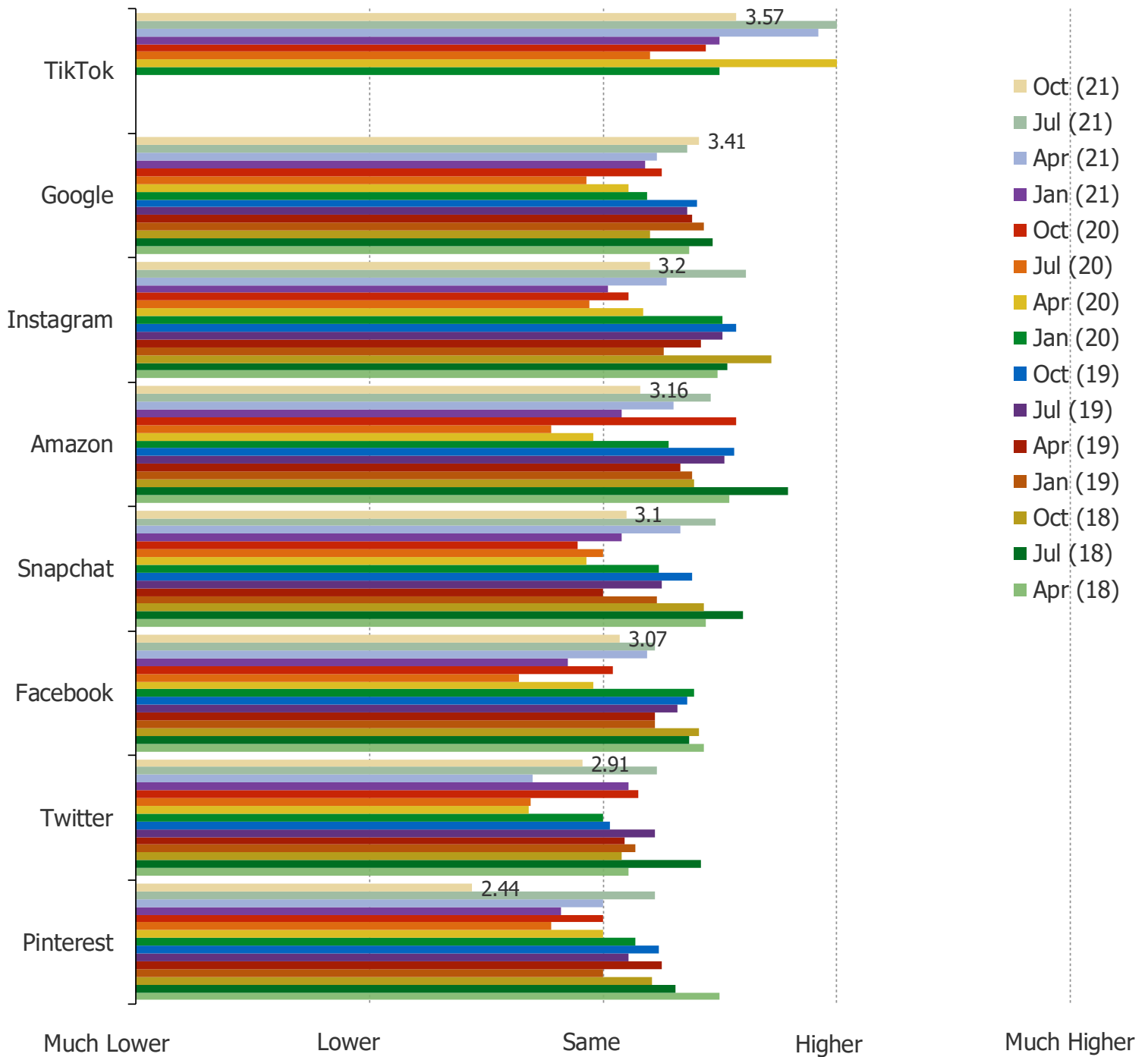
This question was posed to the target audience.



SPEND CHANGES

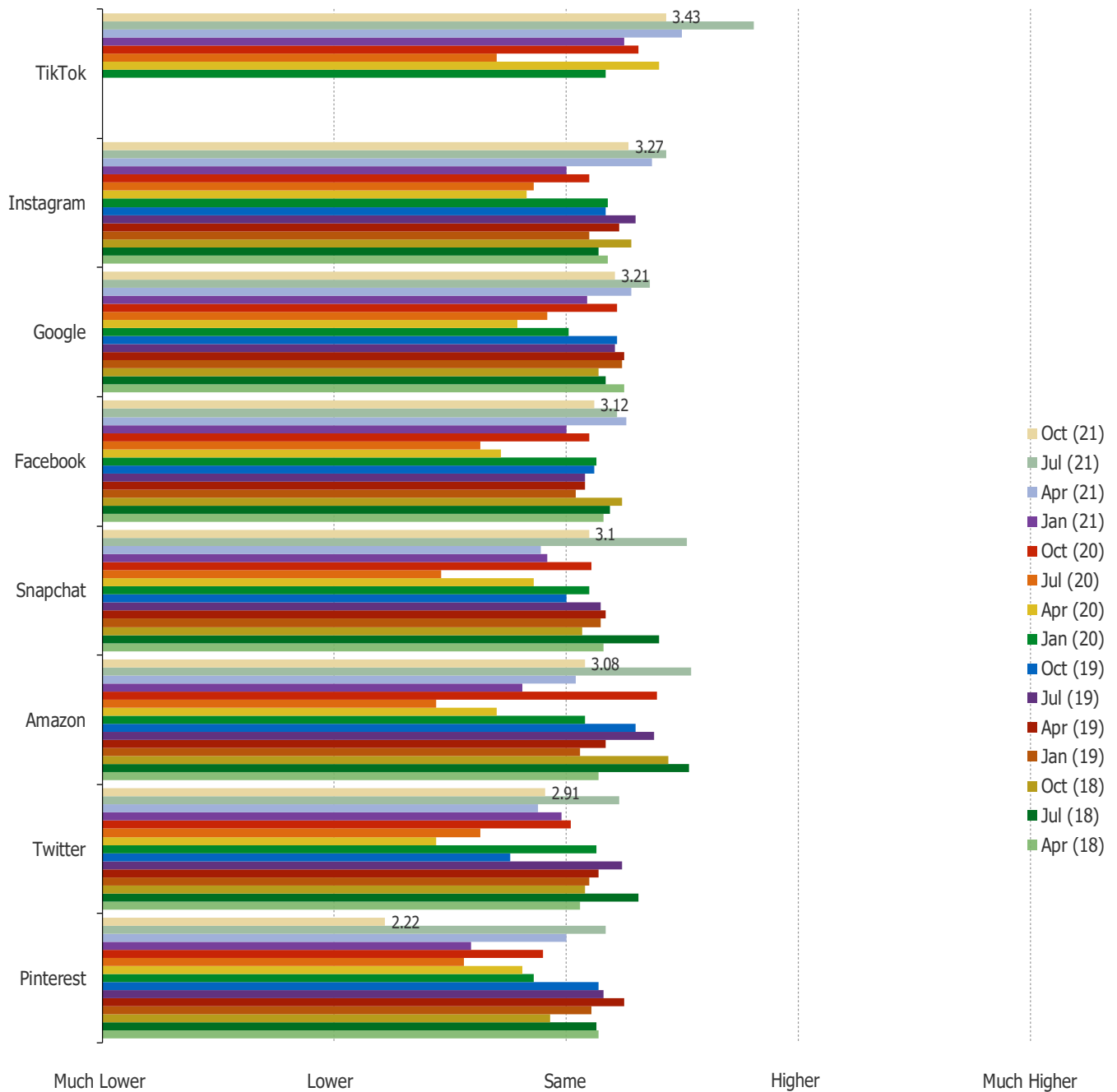
PLEASE COMPARE YOUR CLIENT'S AD SPENDING ON THE FOLLOWING NOW VS. ONE YEAR AGO.

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



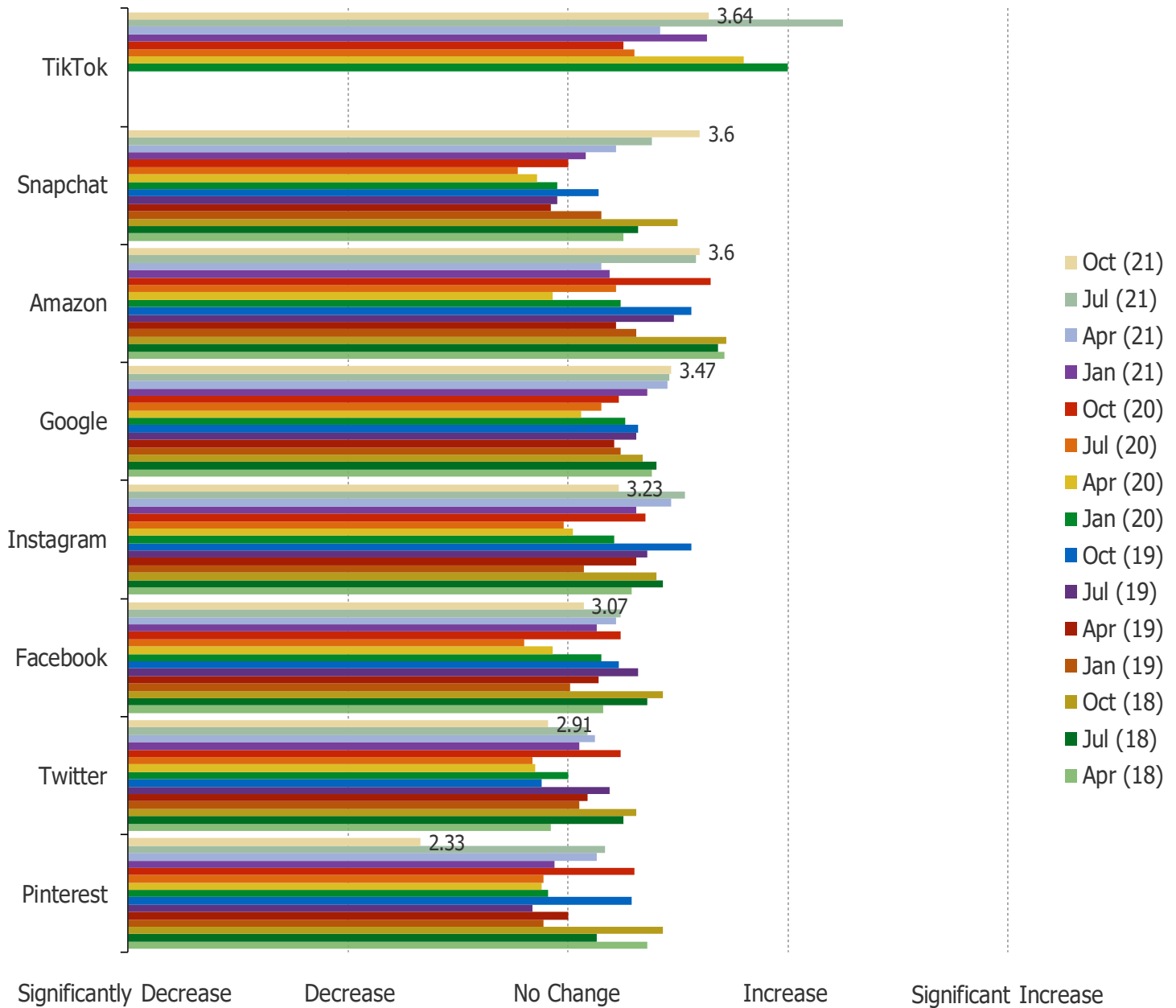
PLEASE COMPARE YOUR CLIENT'S AD SPENDING NOW VS. ONE QUARTER AGO.

*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?

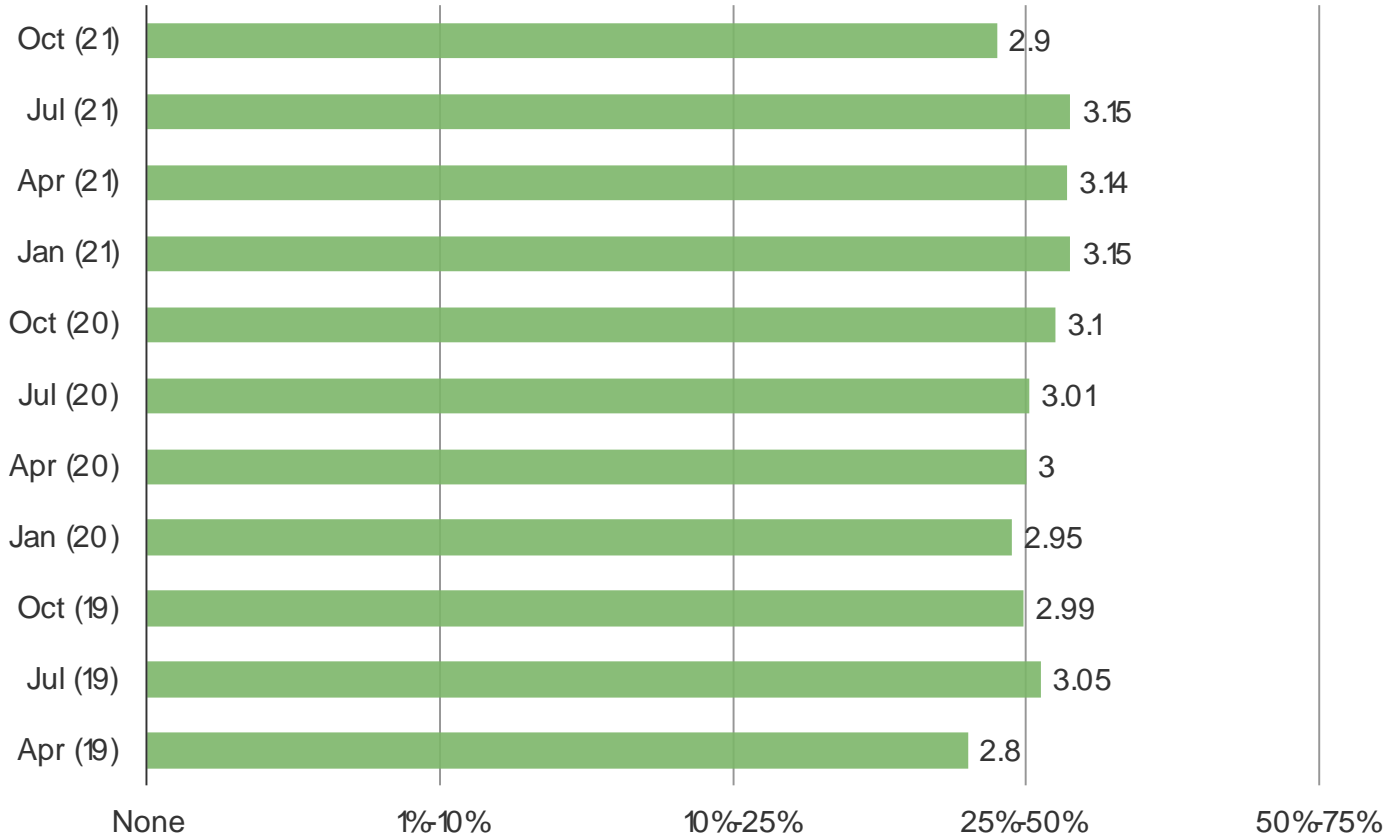
*Posed to ad execs whose clients have paid campaigns with each of the following platforms



SPENDING GROWTH FEEDBACK

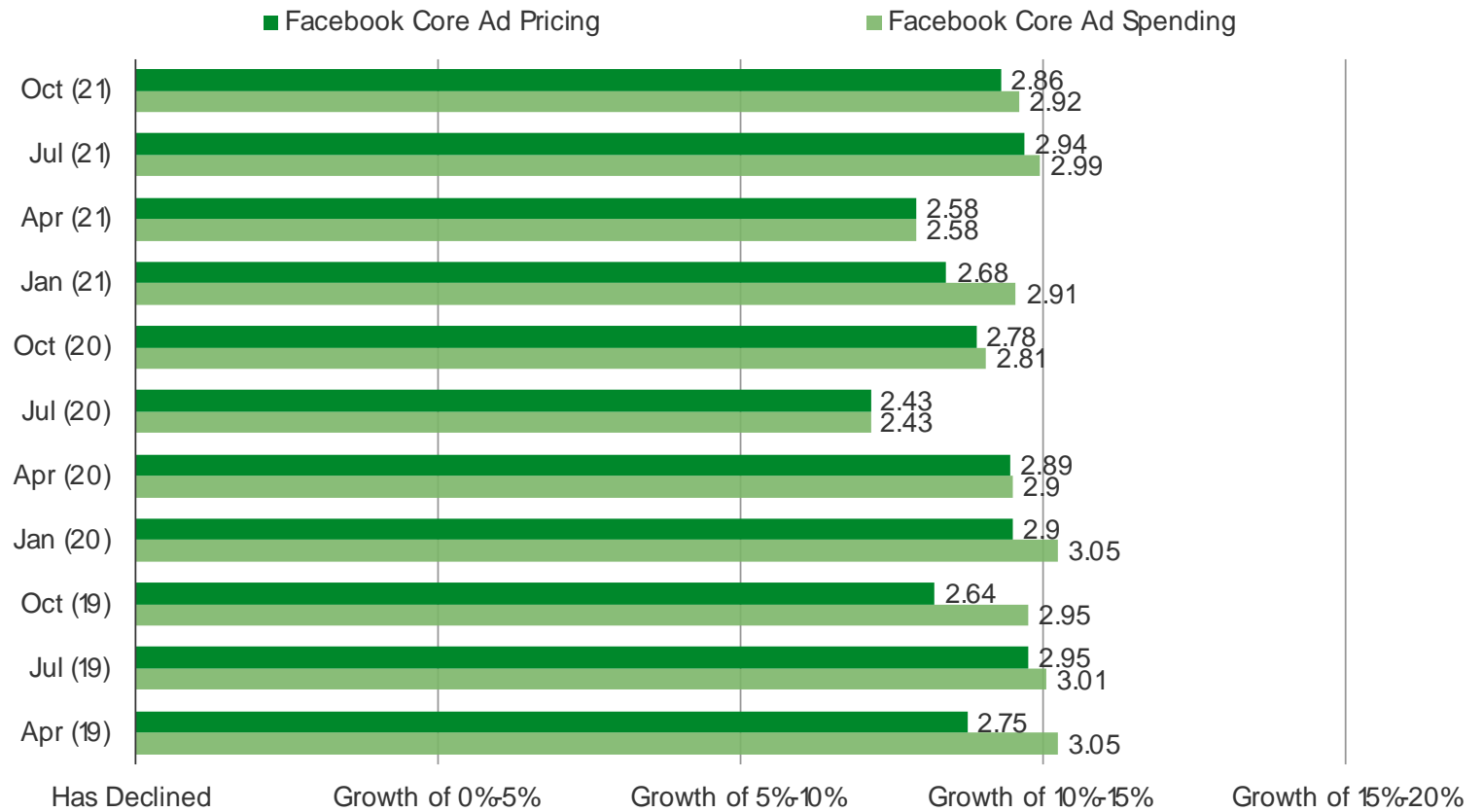
OF CLIENT SPENDING ON FACEBOOK, WHAT PERCENTAGE IS ON INSTAGRAM?

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



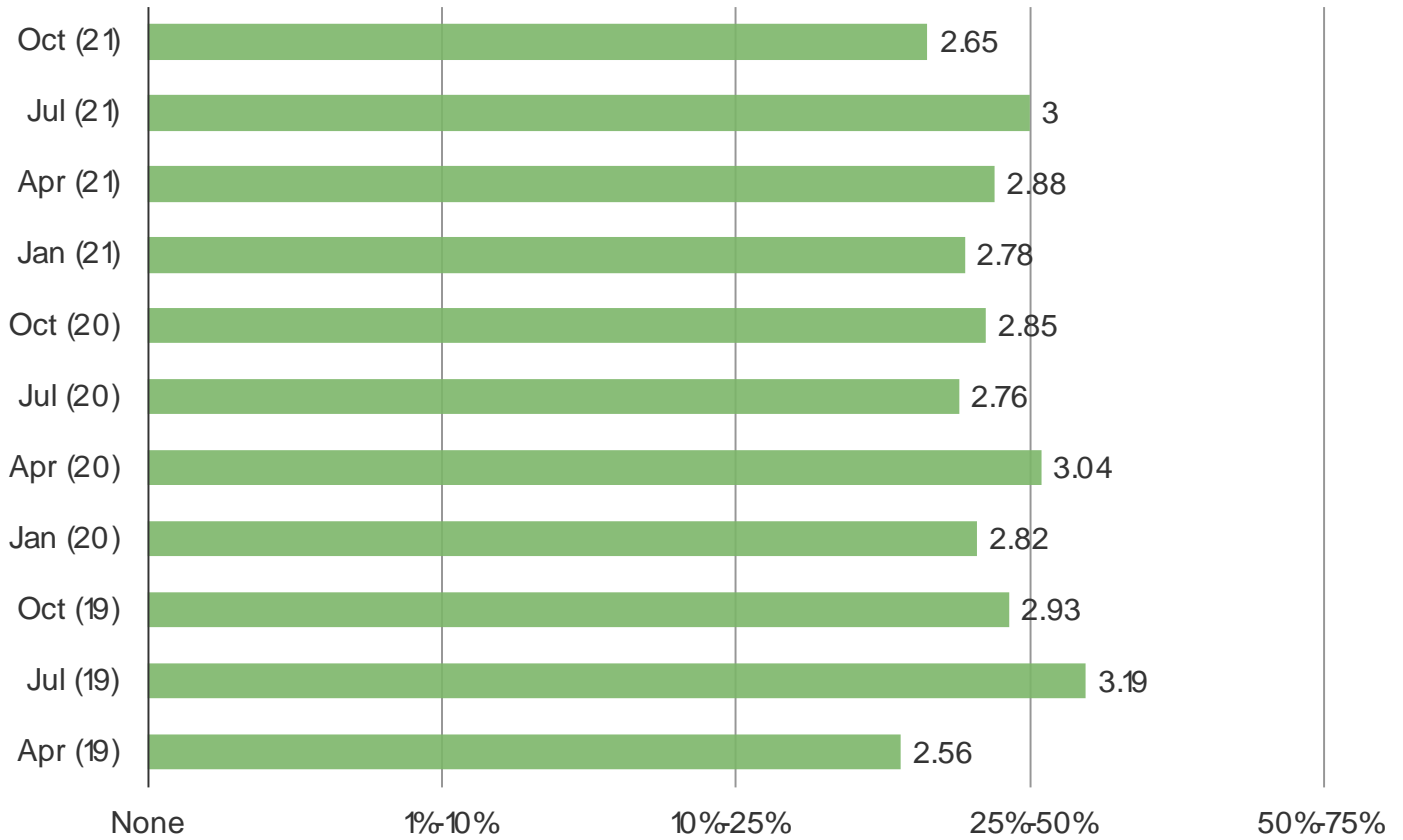
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



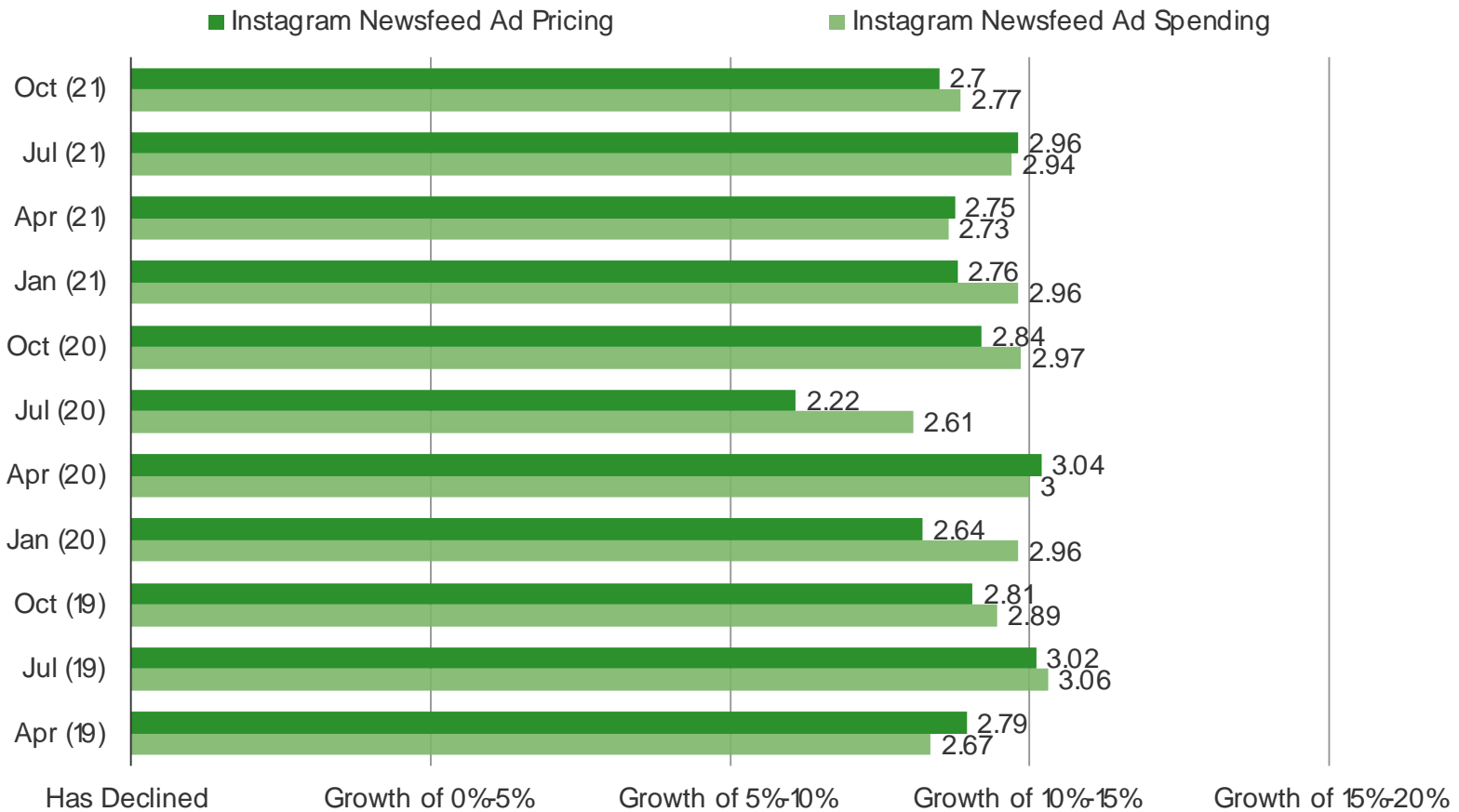
OF CLIENT SPENDING ON INSTAGRAM, WHAT PERCENTAGE IS ON INSTAGRAM STORIES?

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



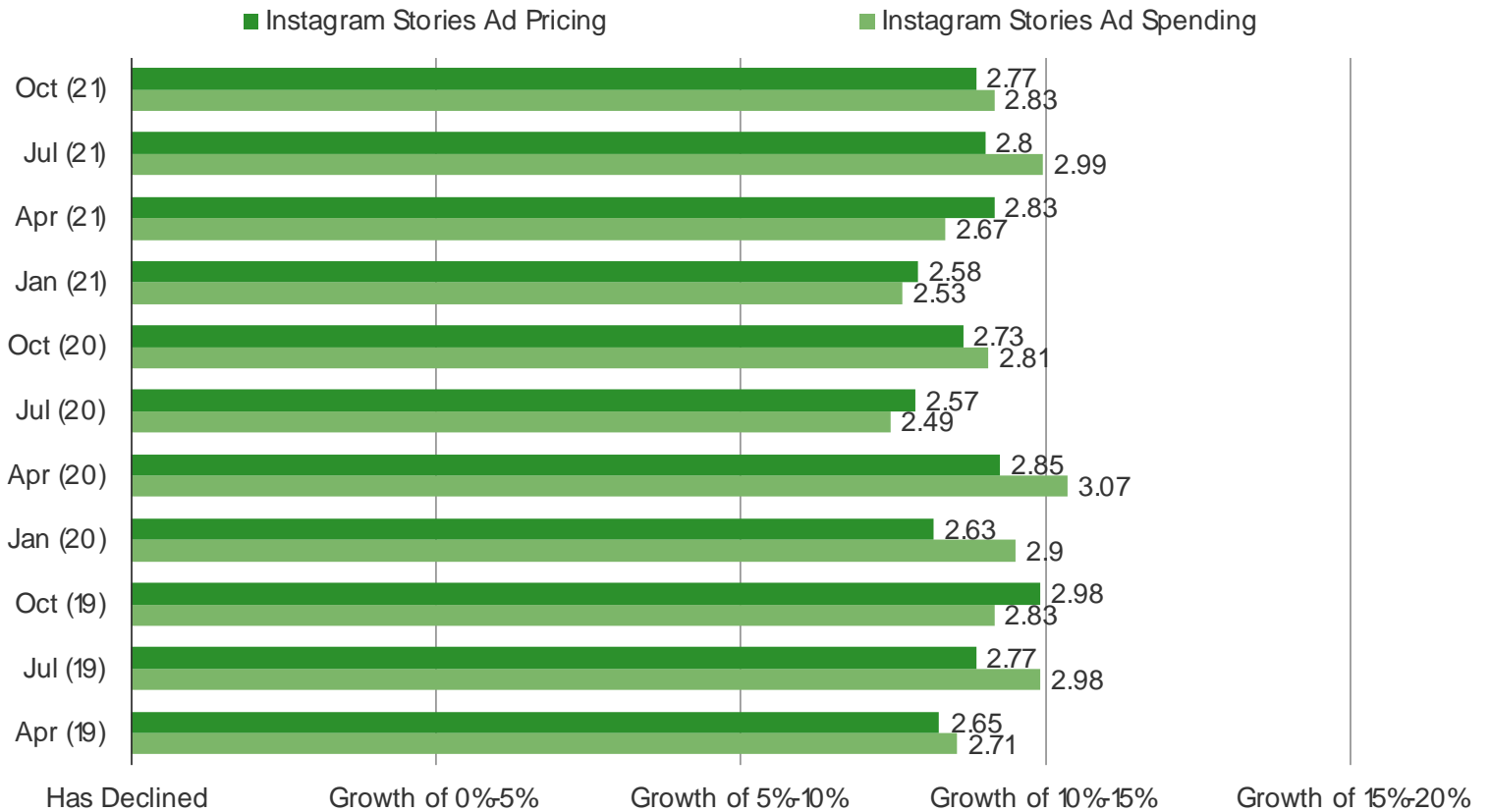
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



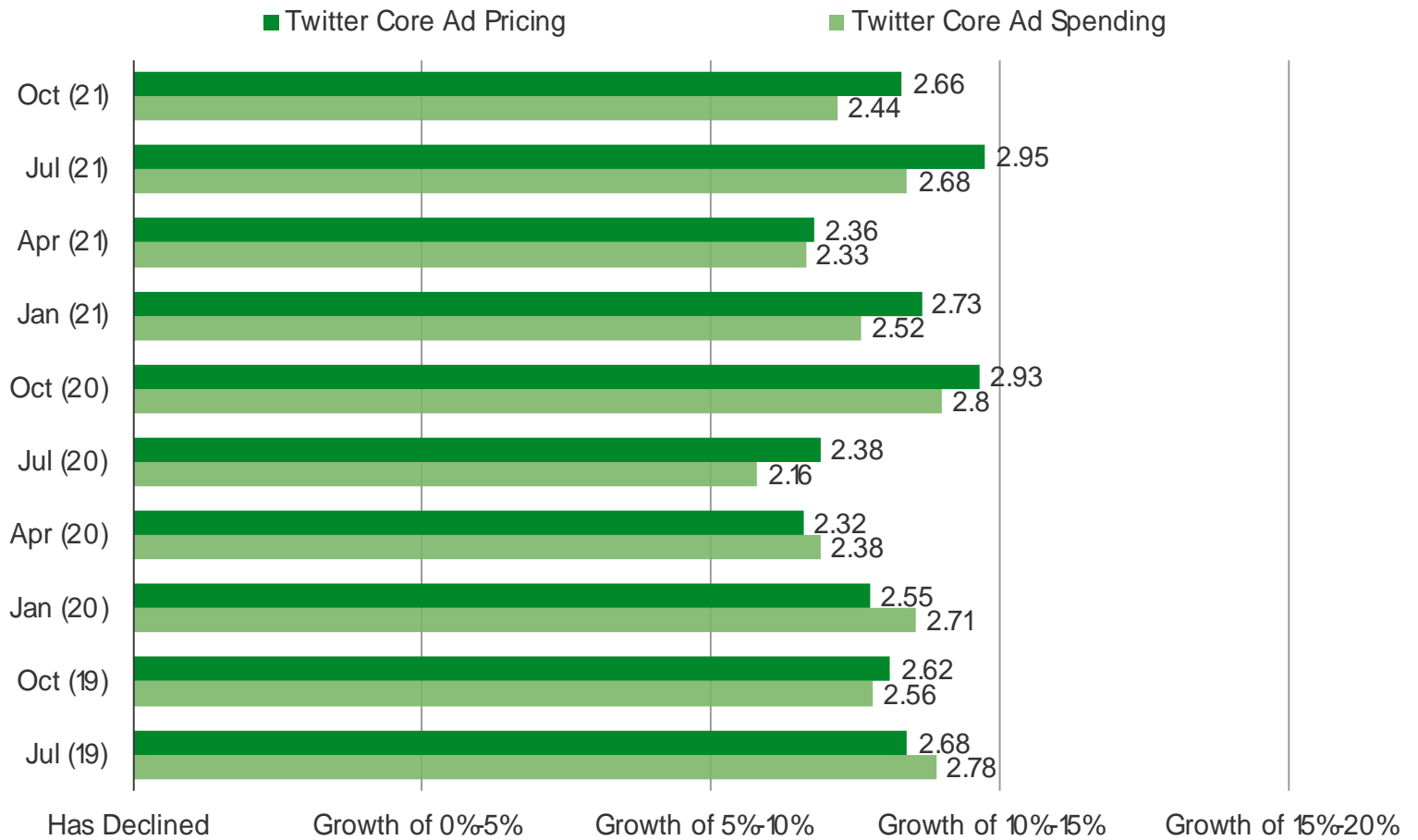
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



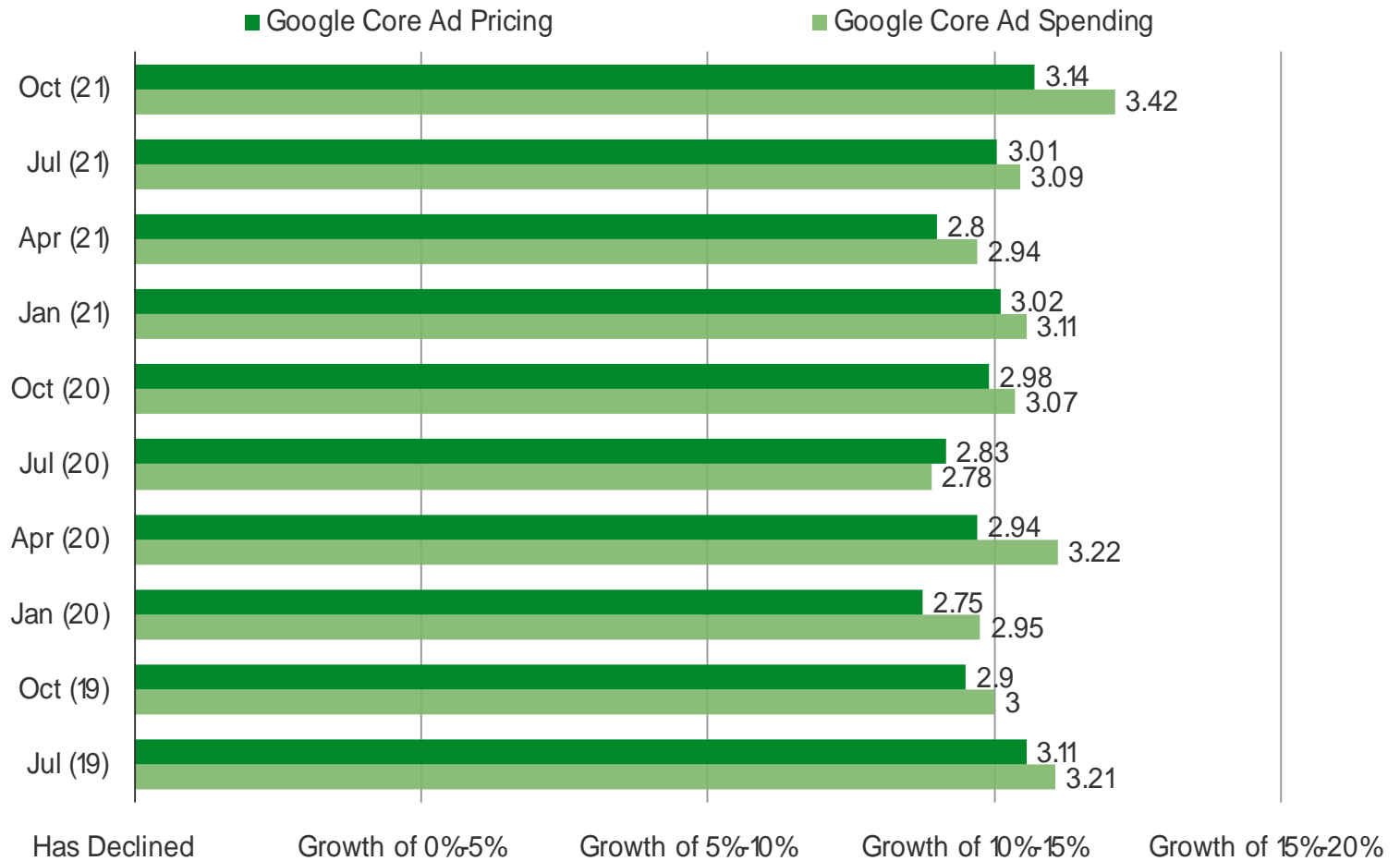
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



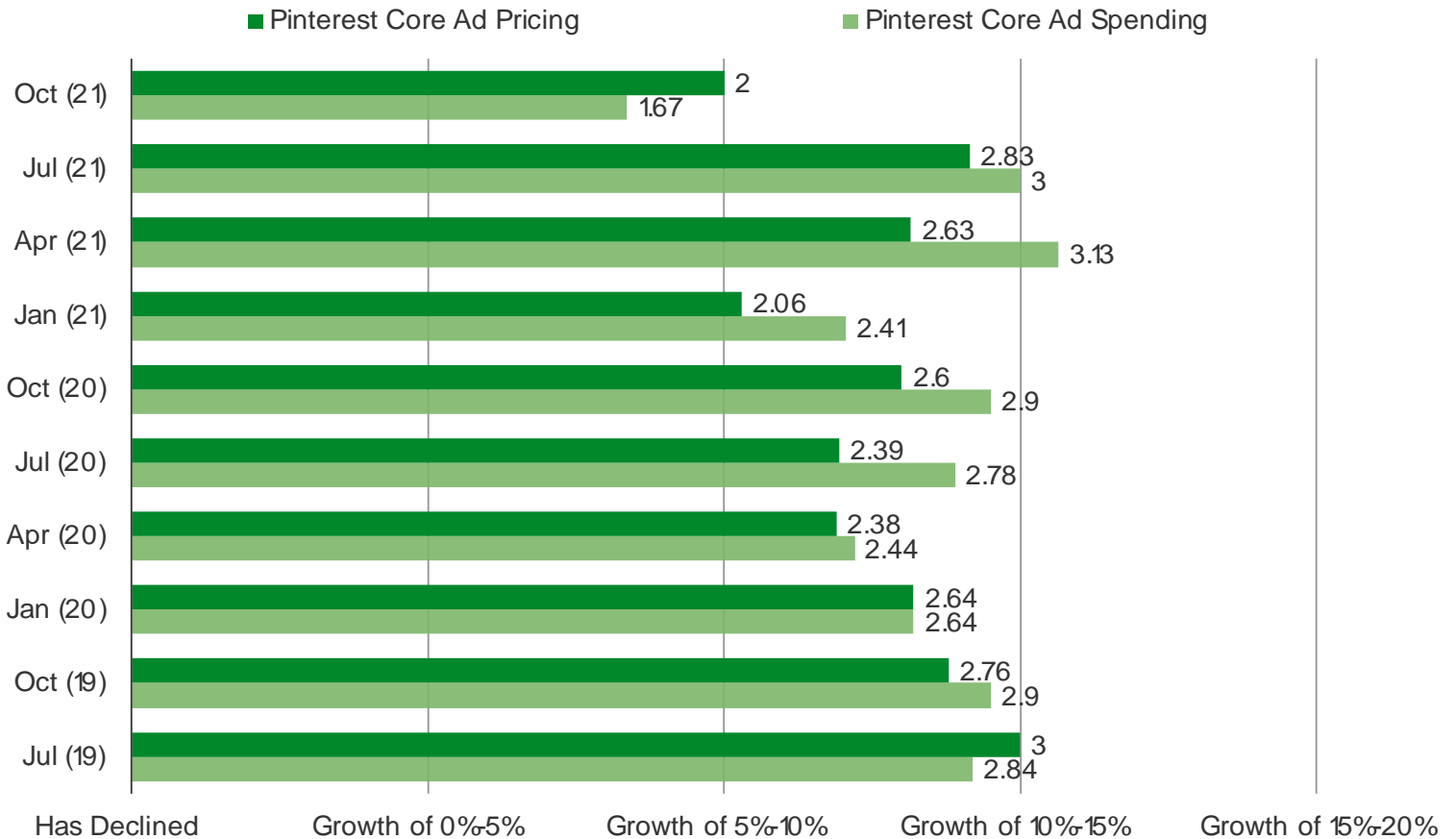
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



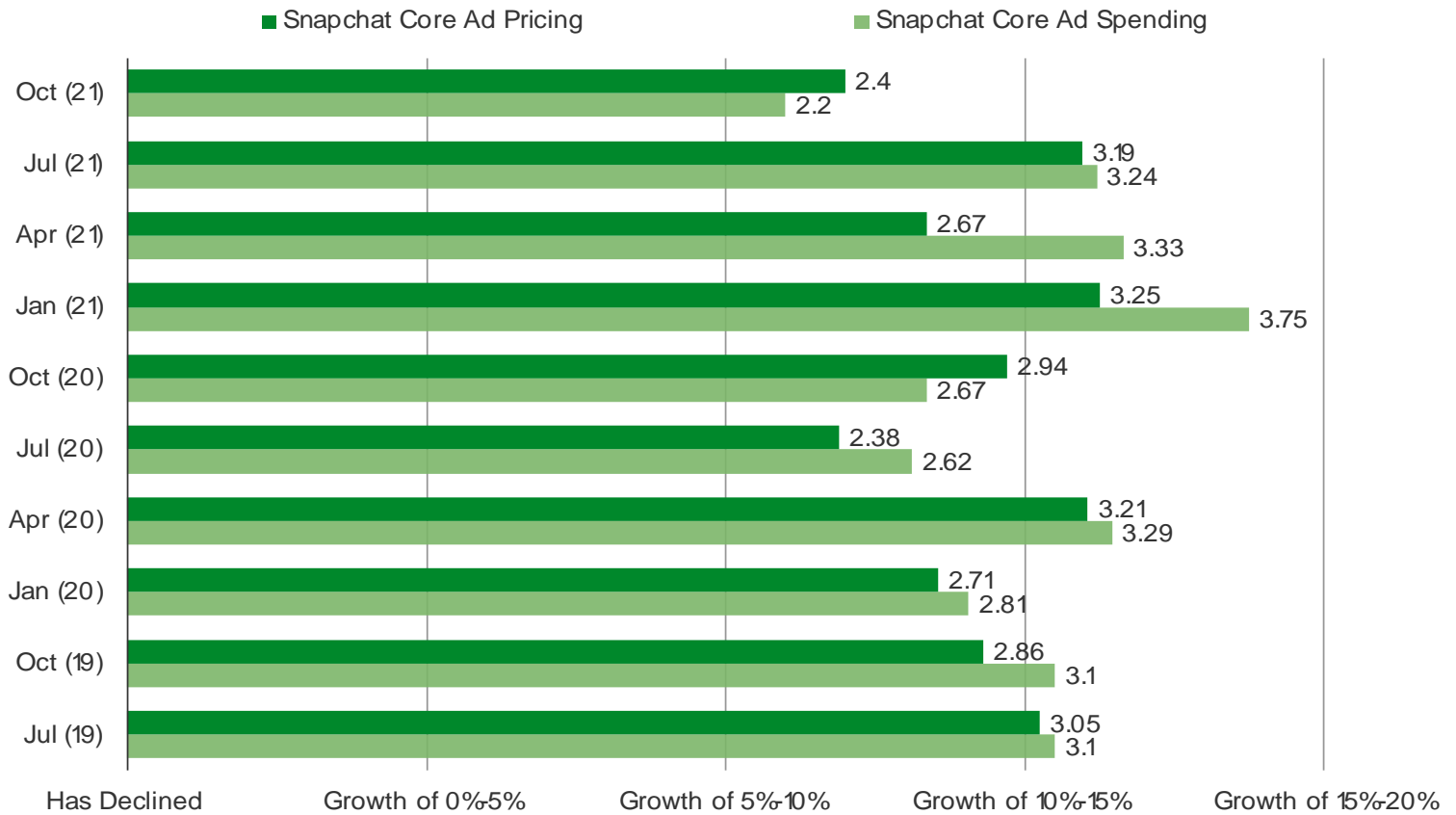
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



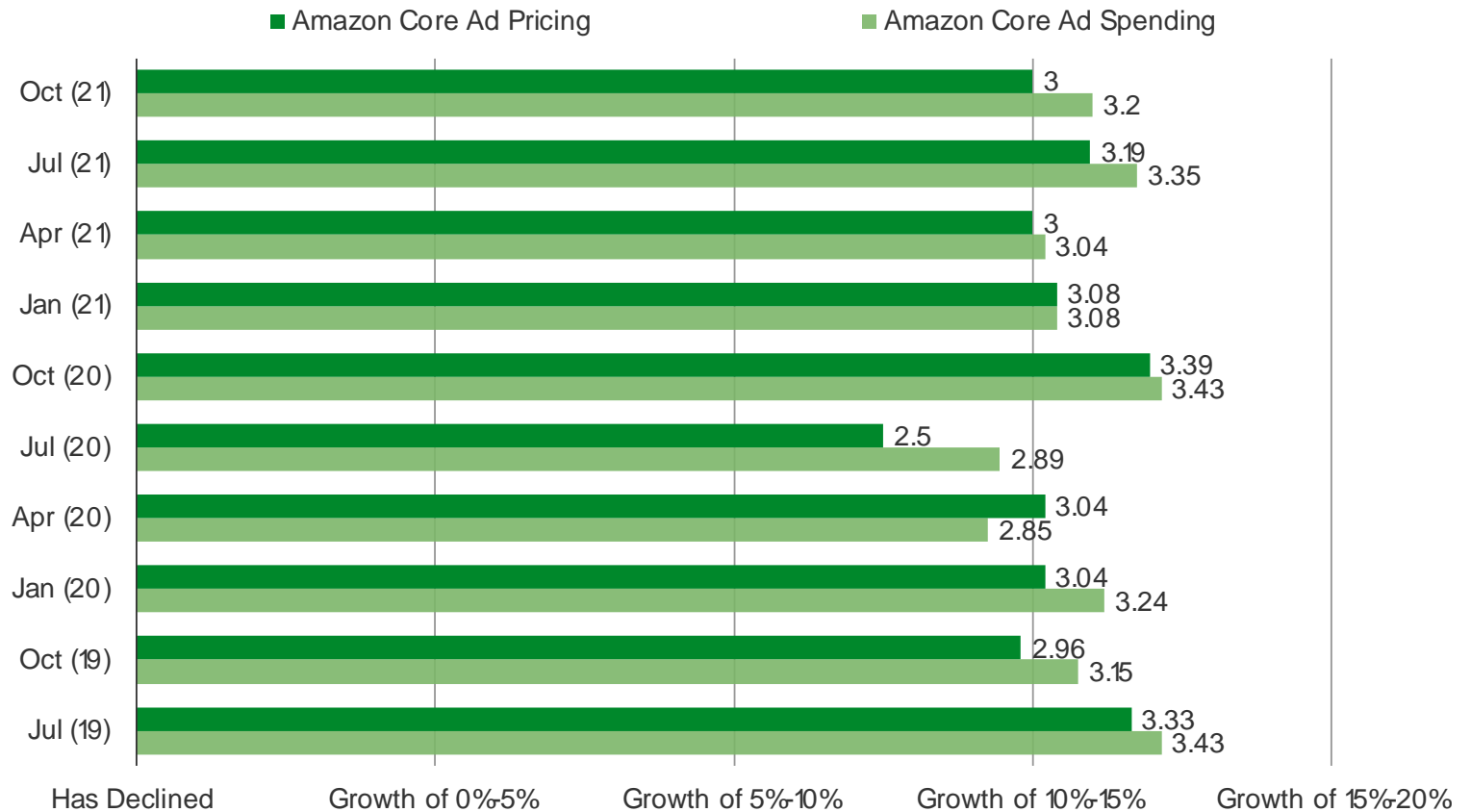
PLEASE ESTIMATE GROWTH IN THE FOLLOWING COMPARED TO ONE YEAR AGO...

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



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

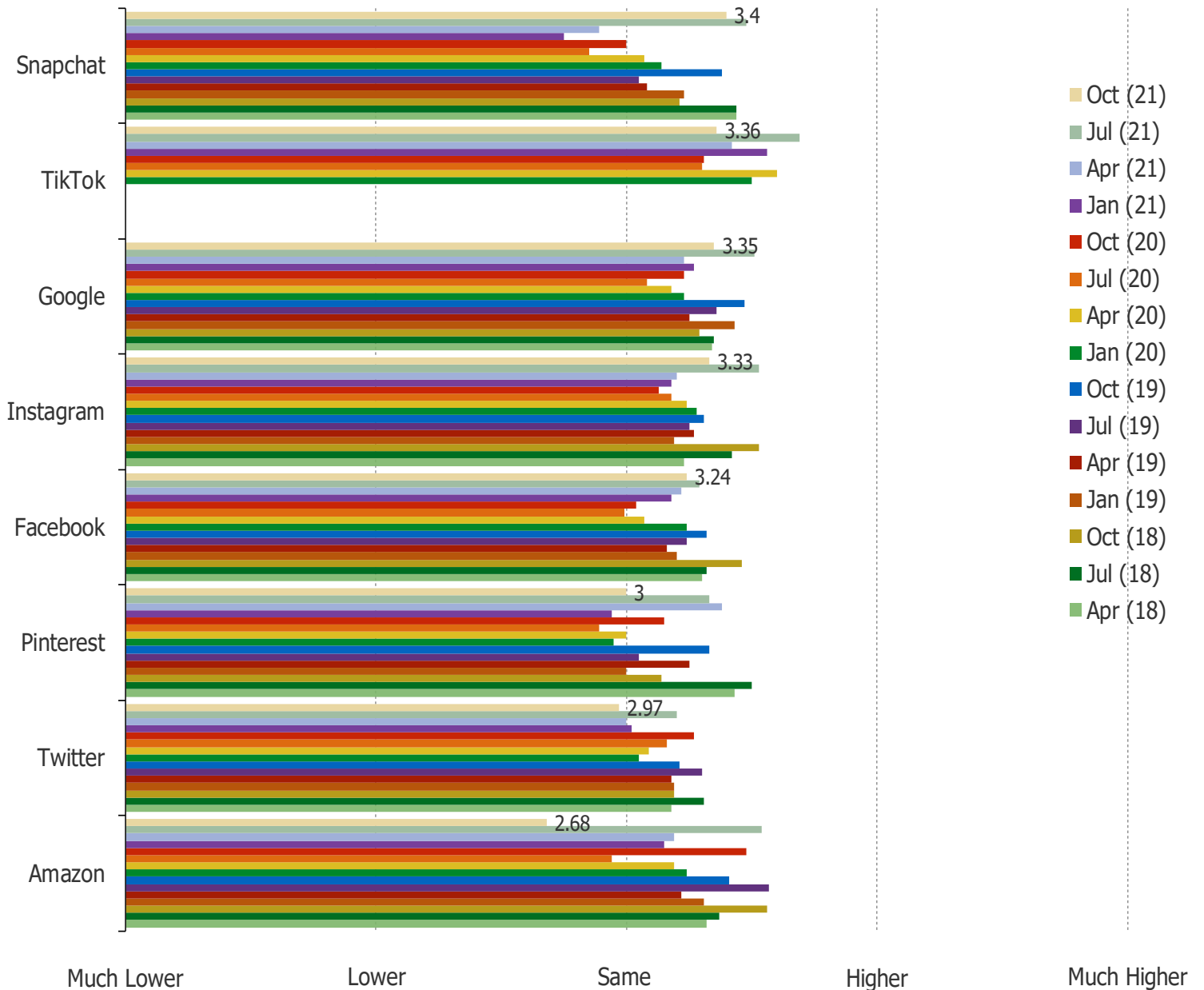
*Posed to ad execs whose clients have paid campaigns with Amazon



PRICING CHANGES

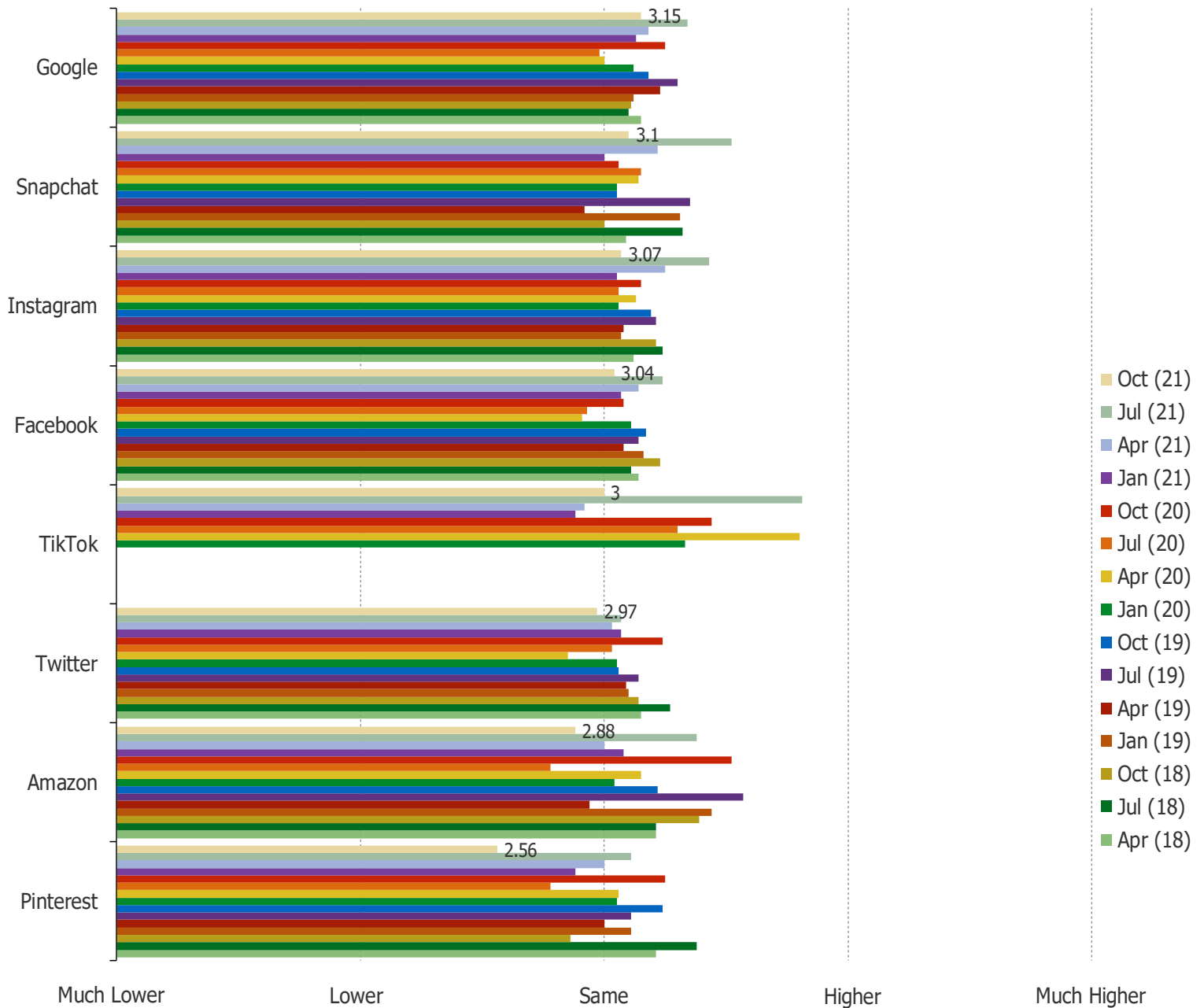
PLEASE COMPARE PRICING TO ADVERTISE WITH EACH PLATFORM COMPARED TO ONE YEAR AGO.

*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.

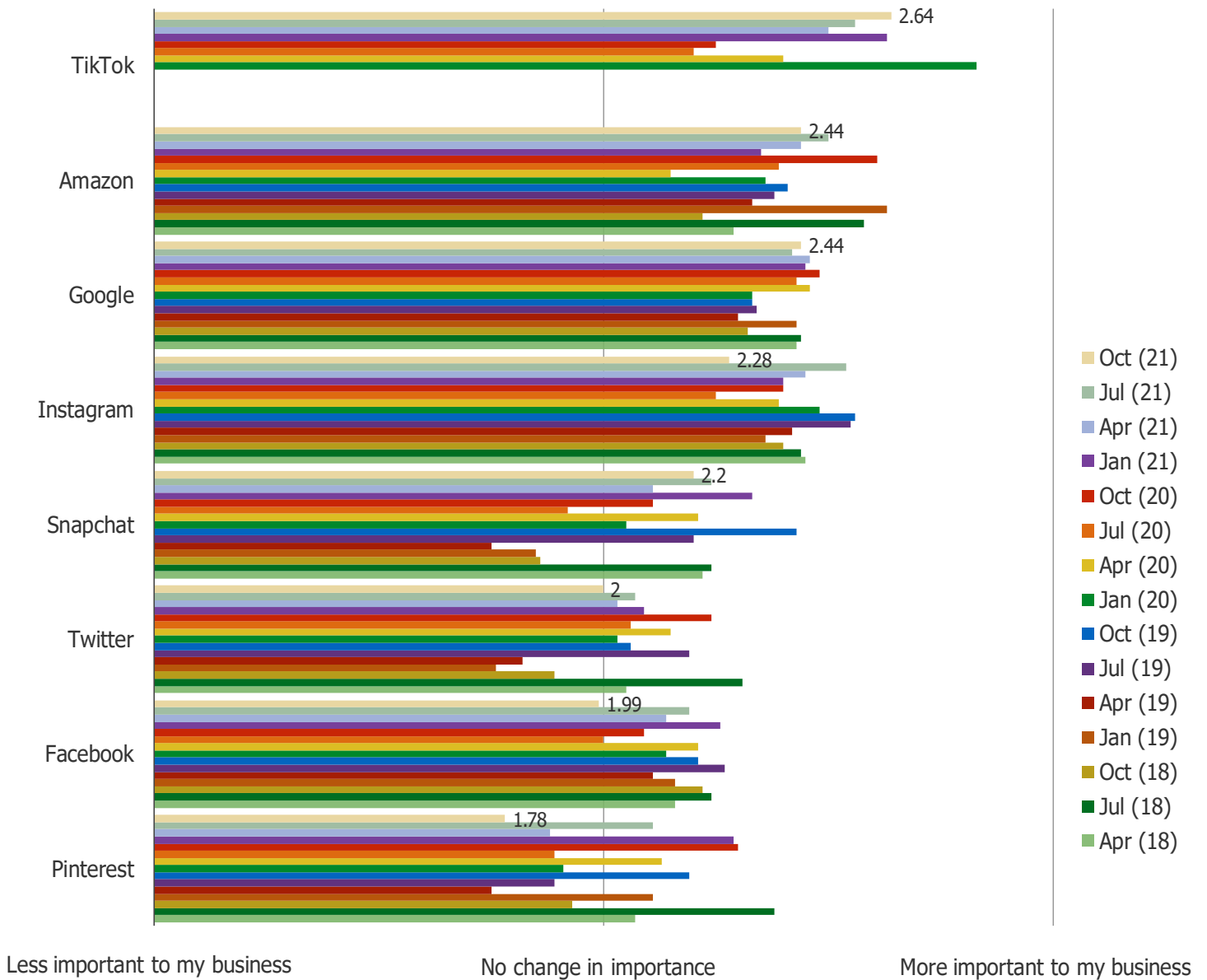
*Posed to ad execs whose clients have paid campaigns with each of the following platforms



SENTIMENT TOWARD PLATFORMS

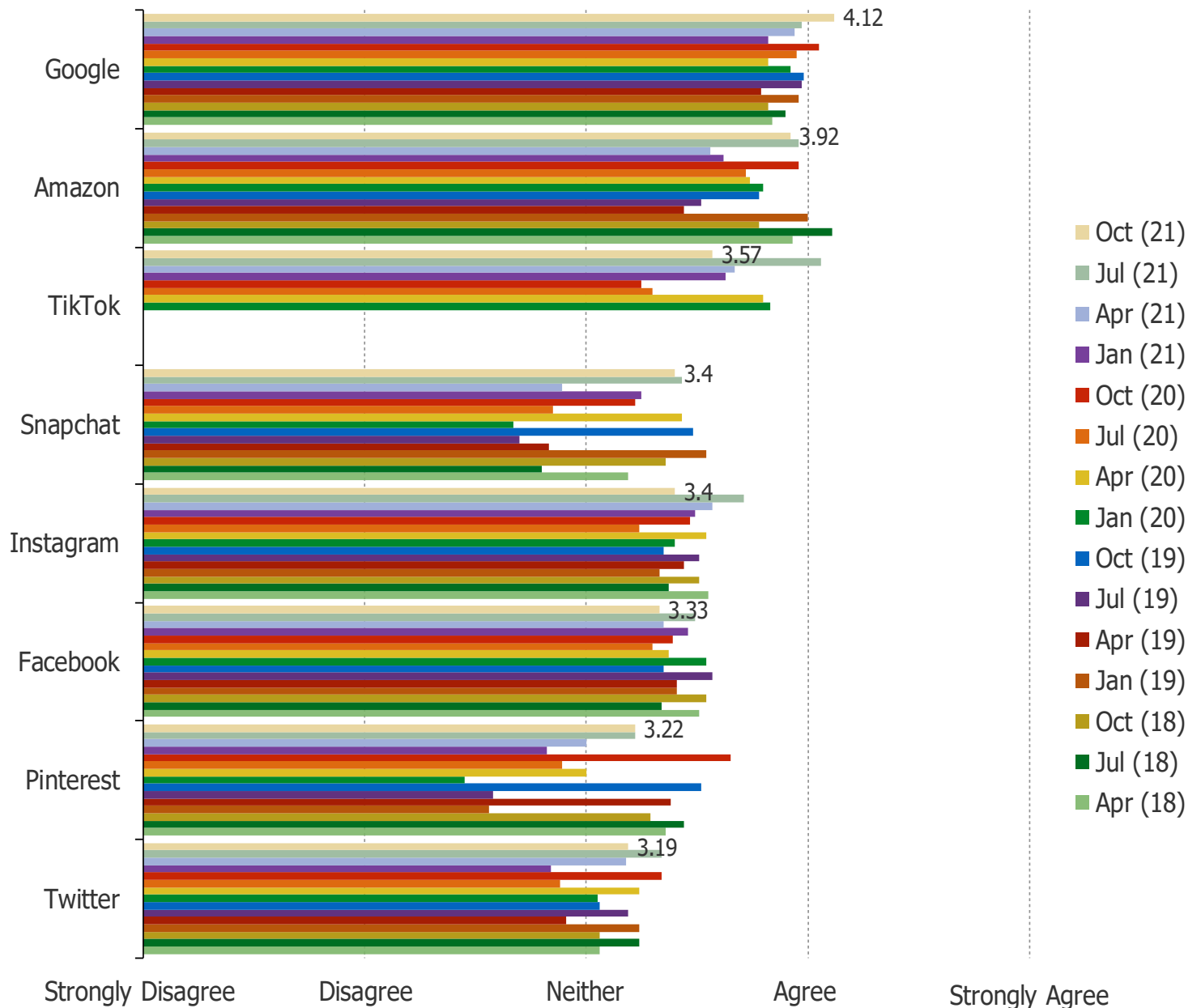
AS YOU LOOK INTO THE FUTURE, IS EACH PLATFORM BECOMING:

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



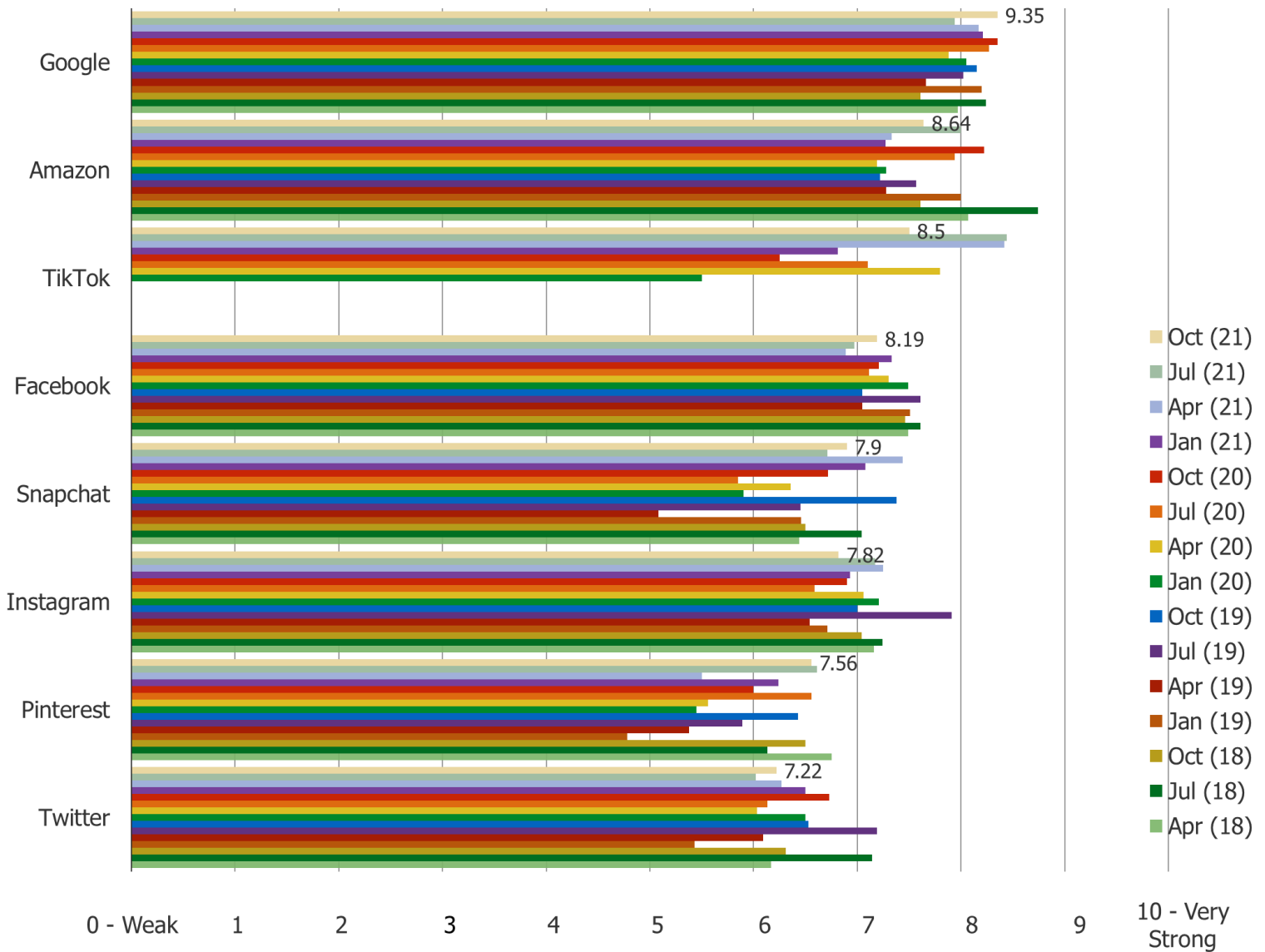
PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENT: "IF IT WENT AWAY TOMORROW, IT WOULD BE DETRIMENTAL TO MY BUSINESS"

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



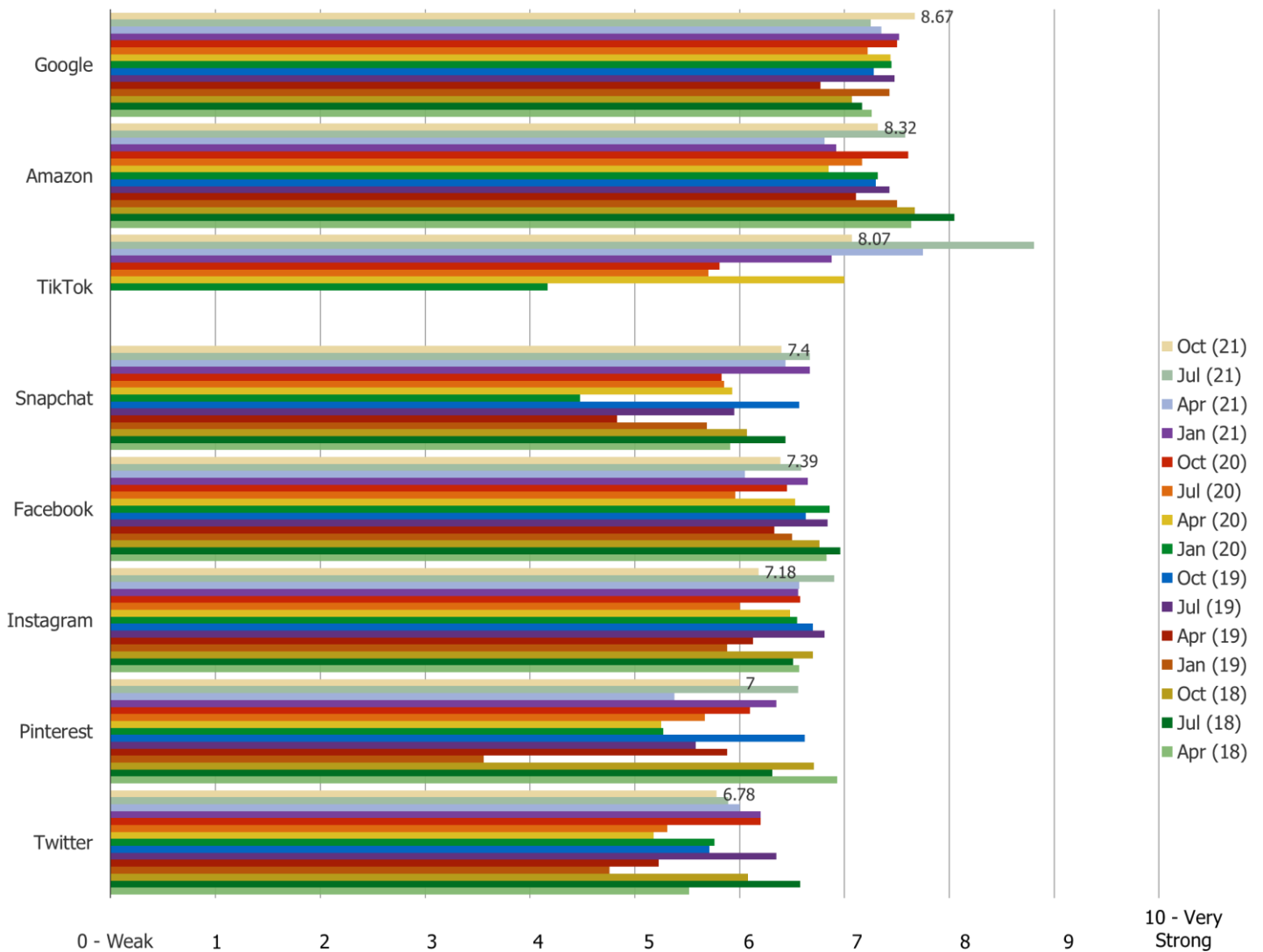
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVERS WHEN IT COMES TO REACH?

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



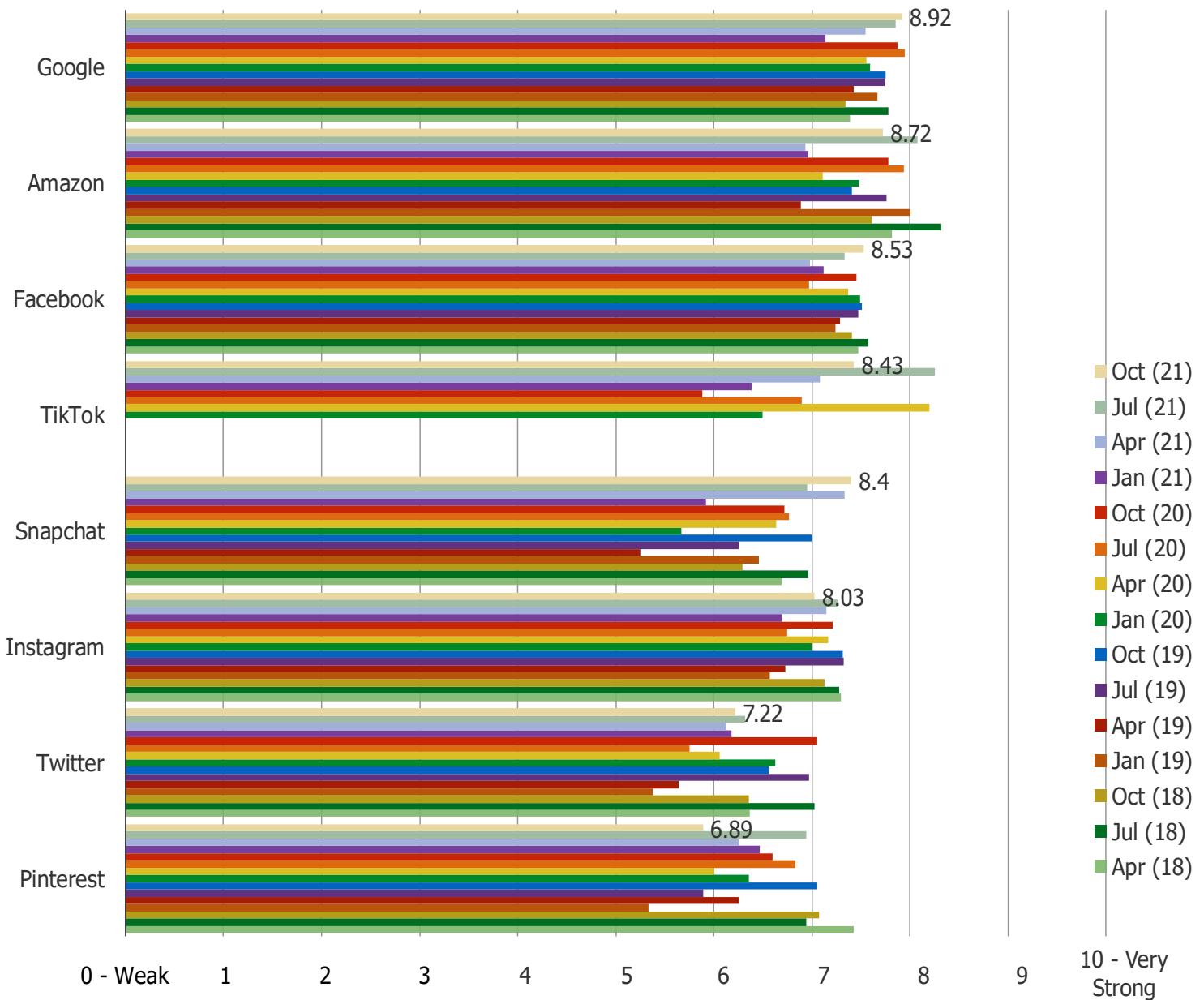
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO RETURN ON ADVERTISING INVESTMENT?

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



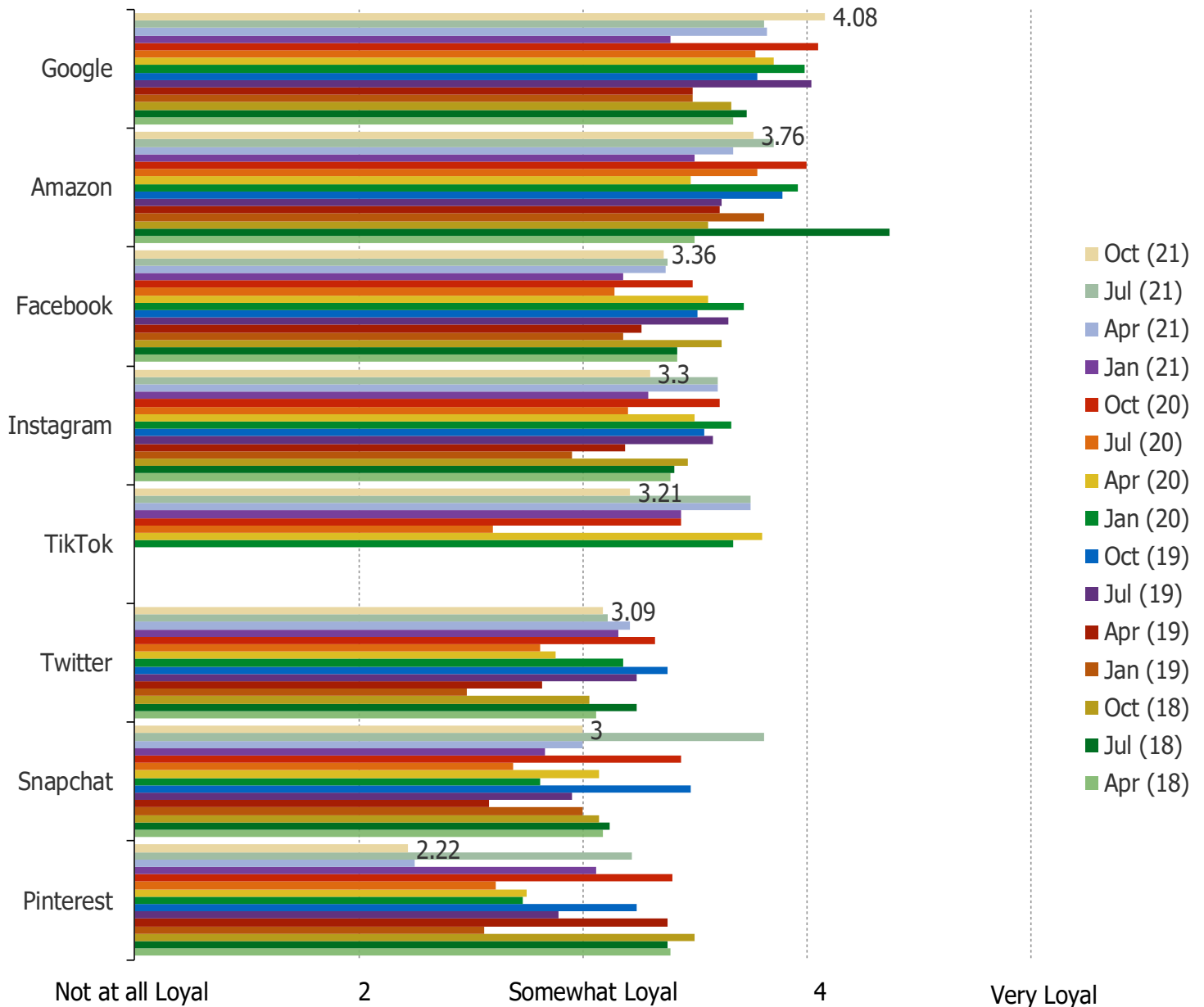
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO TARGETING DATA THEY HAVE ON USERS?

*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?

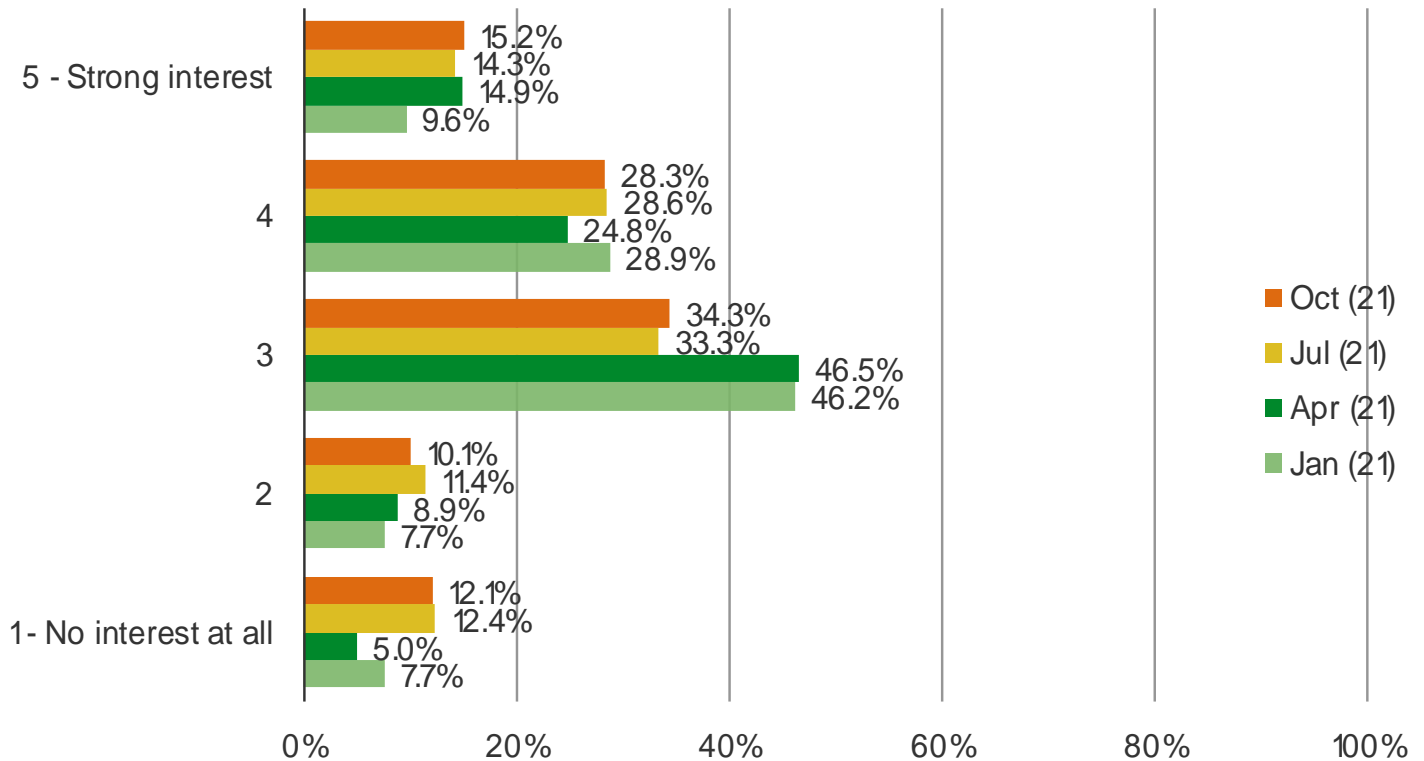
*Posed to ad execs whose clients have paid campaigns with each of the following platforms



SOCIAL COMMERCE

FROM YOUR EXPERIENCE WITH CLIENTS, HOW MUCH INTEREST IS THERE IN “SOCIAL COMMERCE” – IE, BEING ABLE TO ADVERTISE PRODUCTS ON SOCIAL MEDIA AND HAVE USERS PURCHASE WITHOUT HAVING TO LEAVE THE APP?

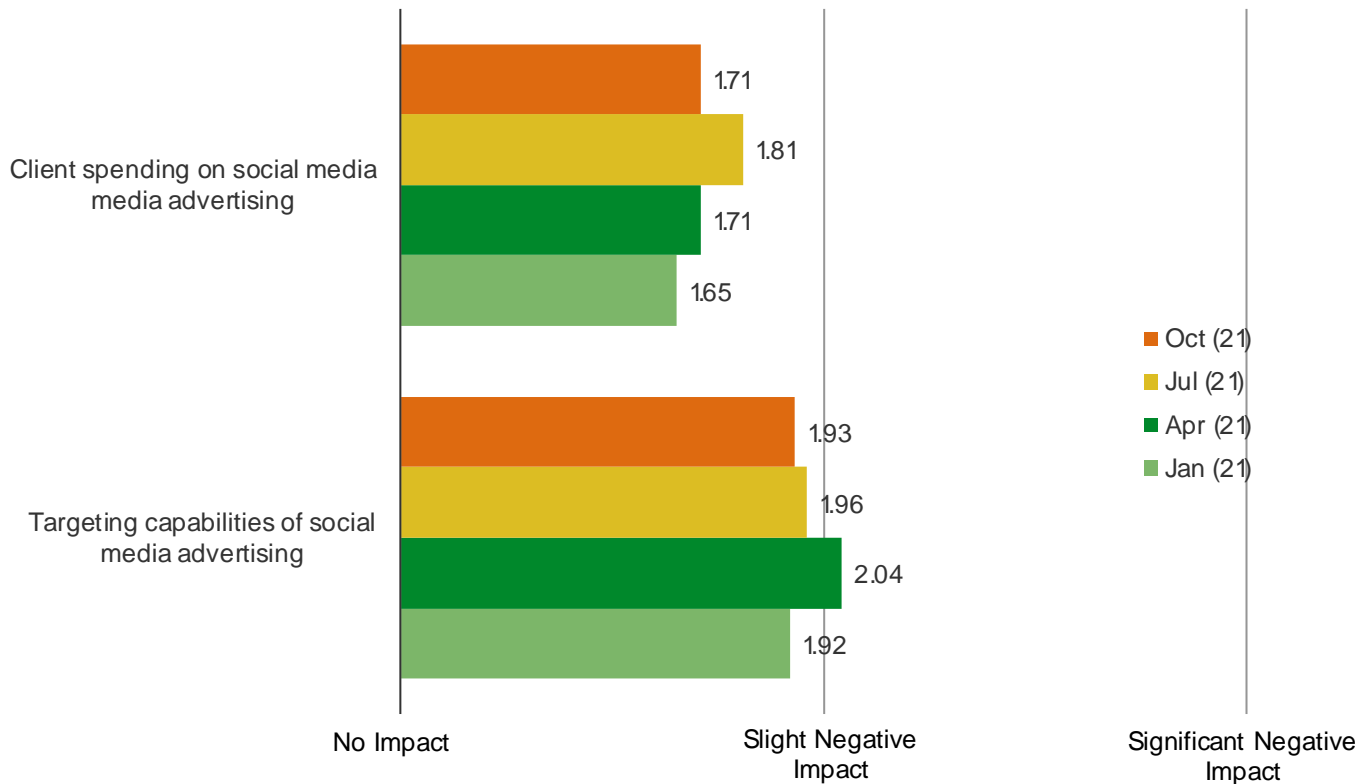
This question was posed to the target audience.



IOS 14 AND PRIVACY

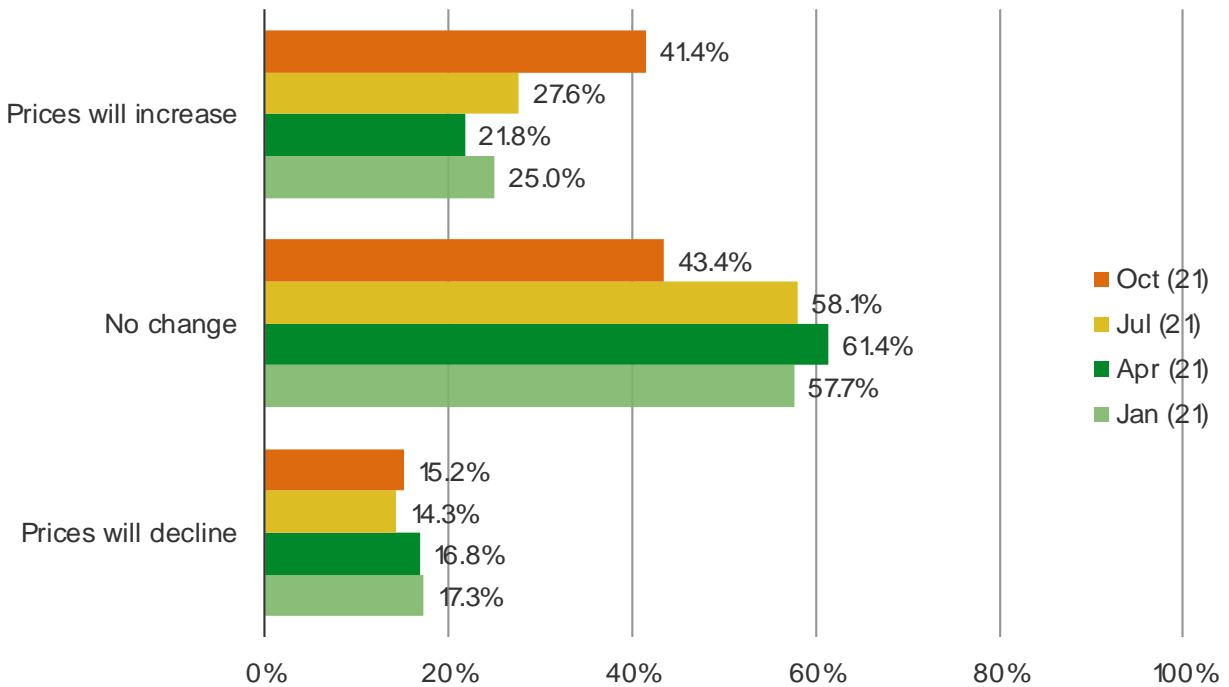
RECENT SOFTWARE UPDATES FOR THE IPHONE REQUIRES APPS TO ASK PERMISSION TO TRACK USERS ON OTHER WEBSITES/APPS. IF USERS DECLINE, THEY CANNOT TRACK THEIR ACTIVITY ON OTHER SITES/APPS. IN YOUR OPINION, WILL THIS HAVE ANY NEGATIVE IMPACTS ON THE FOLLOWING?

This question was posed to the target audience.



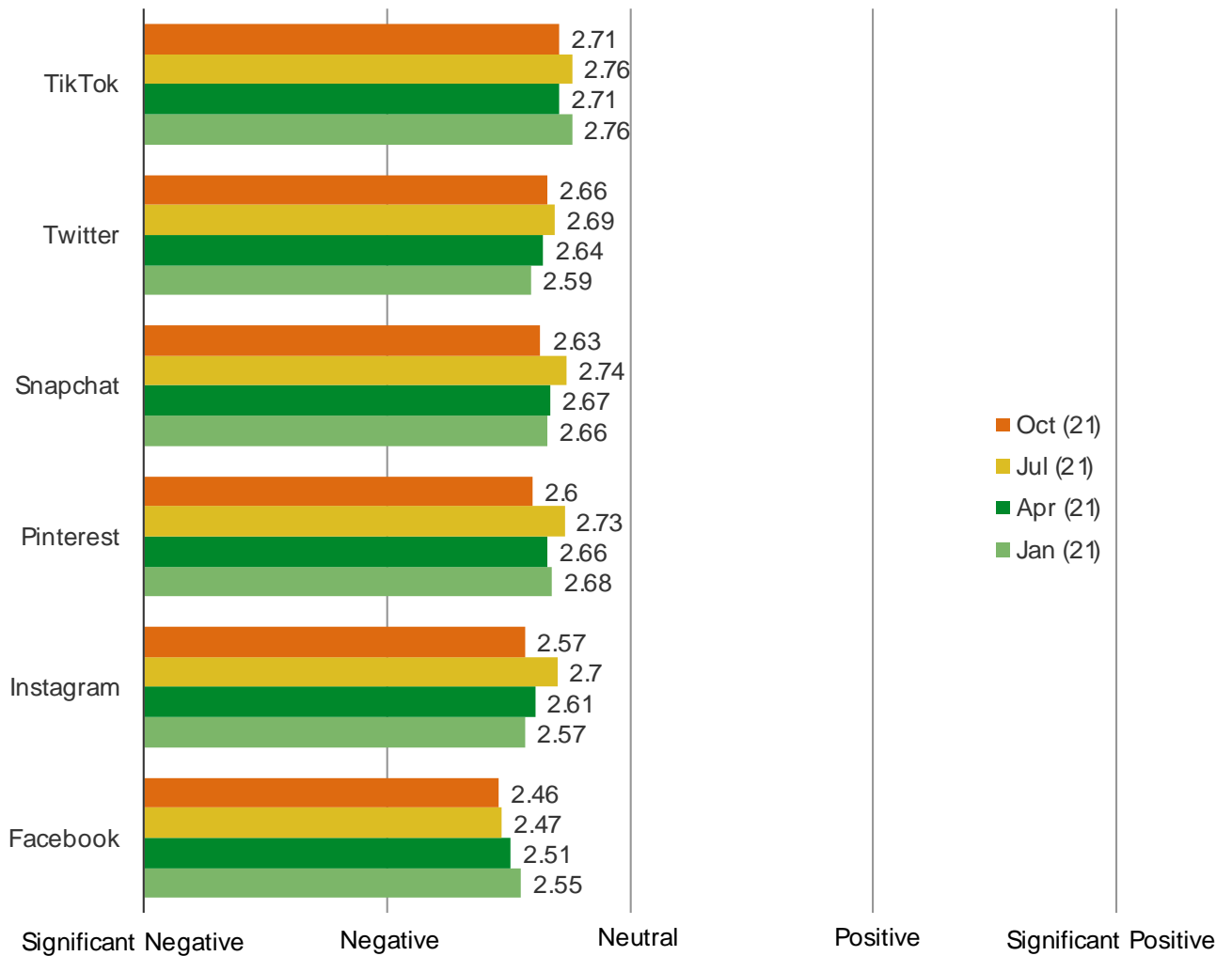
DO YOU EXPECT THE PRICING/COSTS ASSOCIATED WITH SOCIAL MEDIA ADVERTISING TO CHANGE AT ALL BECAUSE OF THE IPHONE IOS PRIVACY FEATURE CHANGES?

This question was posed to the target audience.



IN YOUR ESTIMATION, WILL THE INTRODUCTION OF THE NEW PRIVACY FEATURES FOR IPHONE IOS 14 BE A NEGATIVE OR A POSITIVE FOR THE FOLLOWING PLATFORMS?

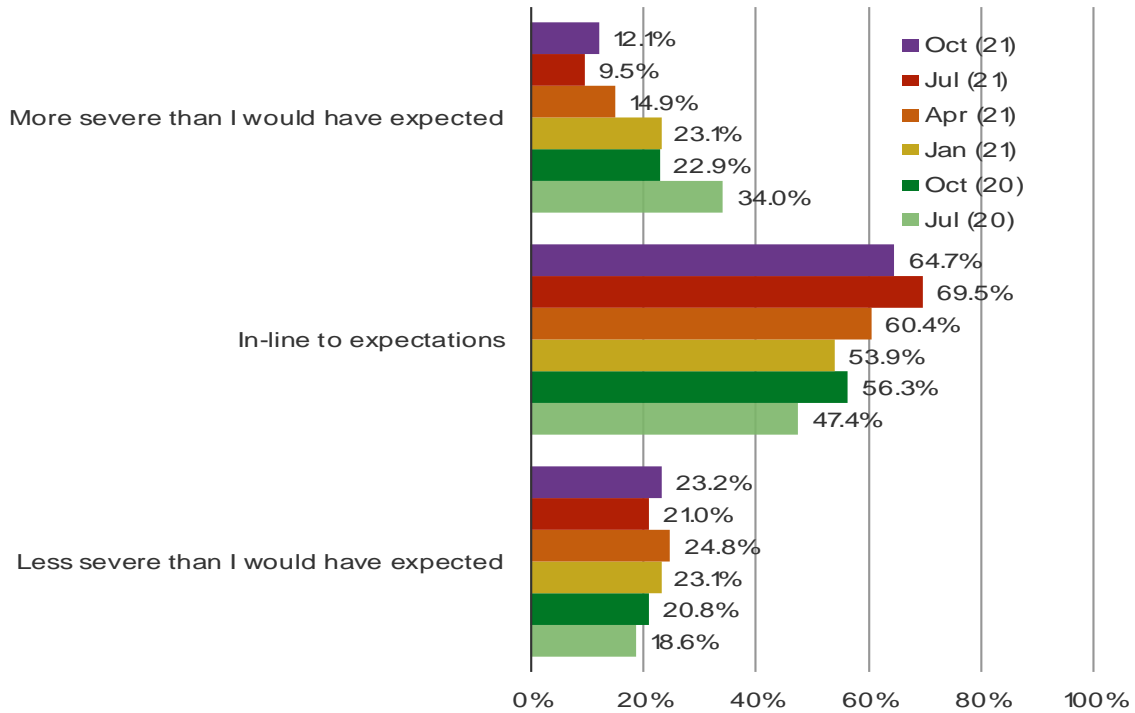
This question was posed to the target audience.



CORONAVIRUS IMPACTS

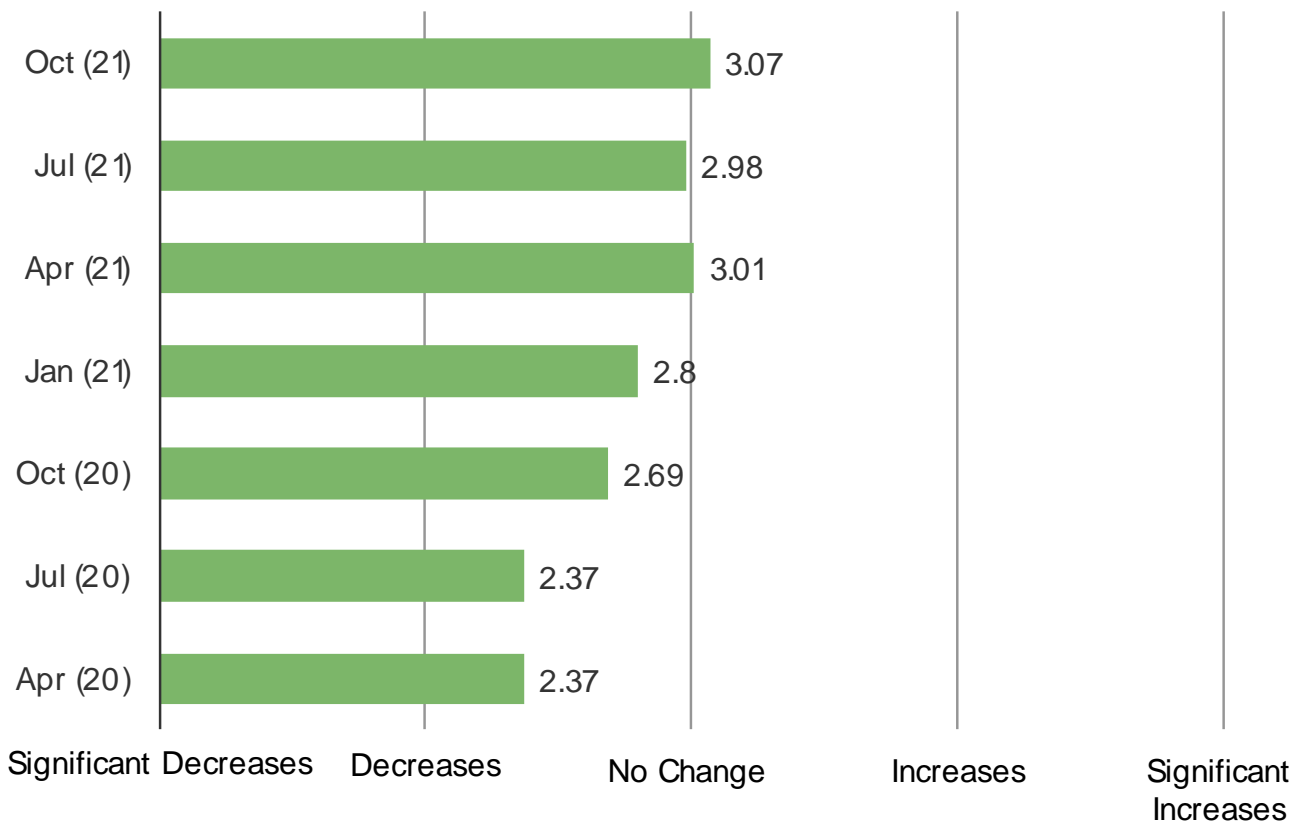
HAVE PANDEMIC/COVID RELATED IMPACTS TO SOCIAL MEDIA AD SPENDING OVER THE LAST FEW MONTHS BEEN MORE OR LESS SEVERE THAN YOU WOULD HAVE EXPECTED?

This question was posed to the target audience.



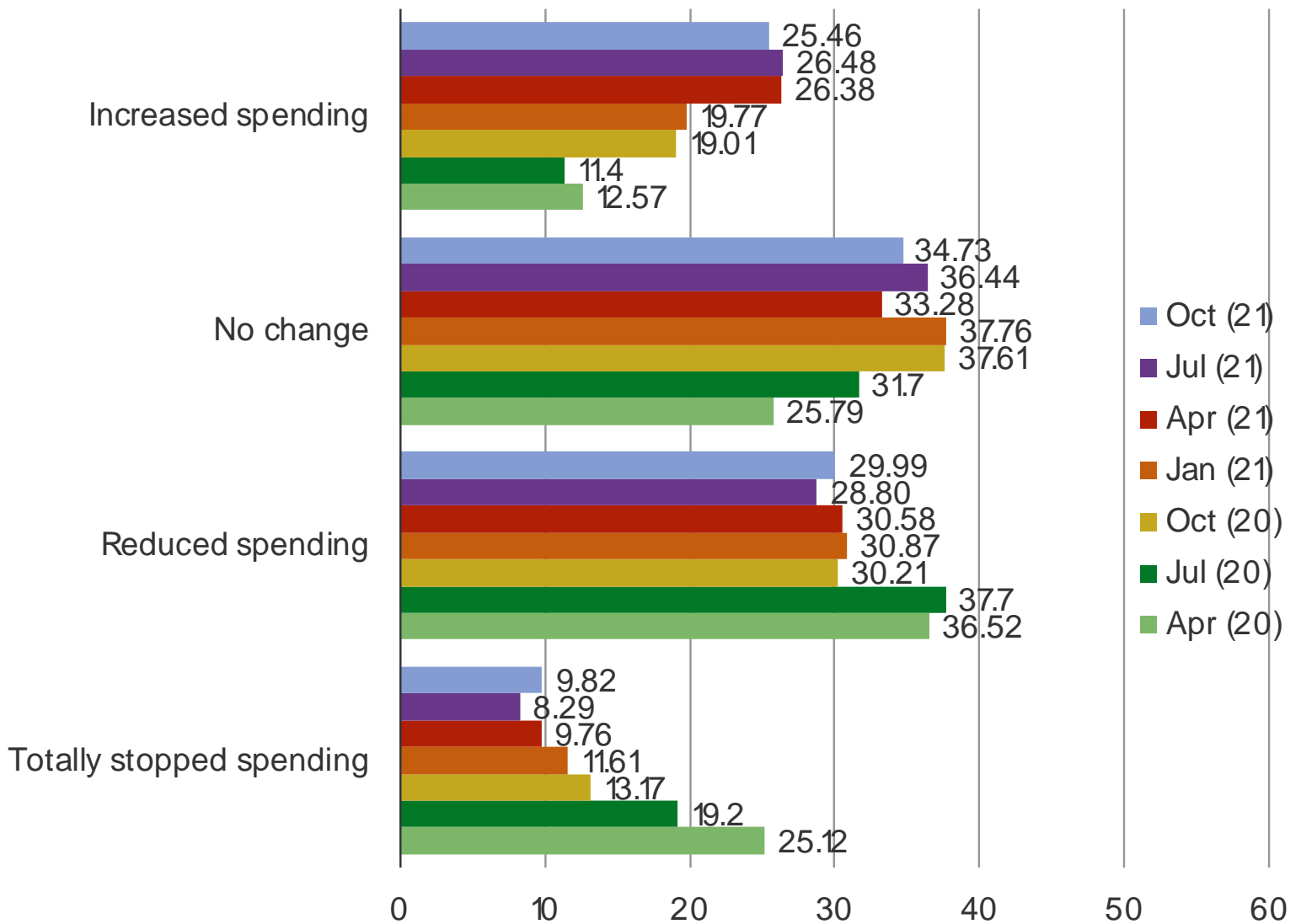
HAS THE CORONAVIRUS AND SOCIAL DISTANCING MEASURES CAUSED ANY IMPACT TO YOUR CLIENTS' AD SPENDING?

This question was posed to the target audience.



WHAT PERCENTAGE OF YOUR CLIENTS ARE DOING THE FOLLOWING BECAUSE OF CORONAVIRUS AND SOCIAL DISTANCING? (PLEASE MAKE SURE THE PERCENTAGES ADD UP TO 100)

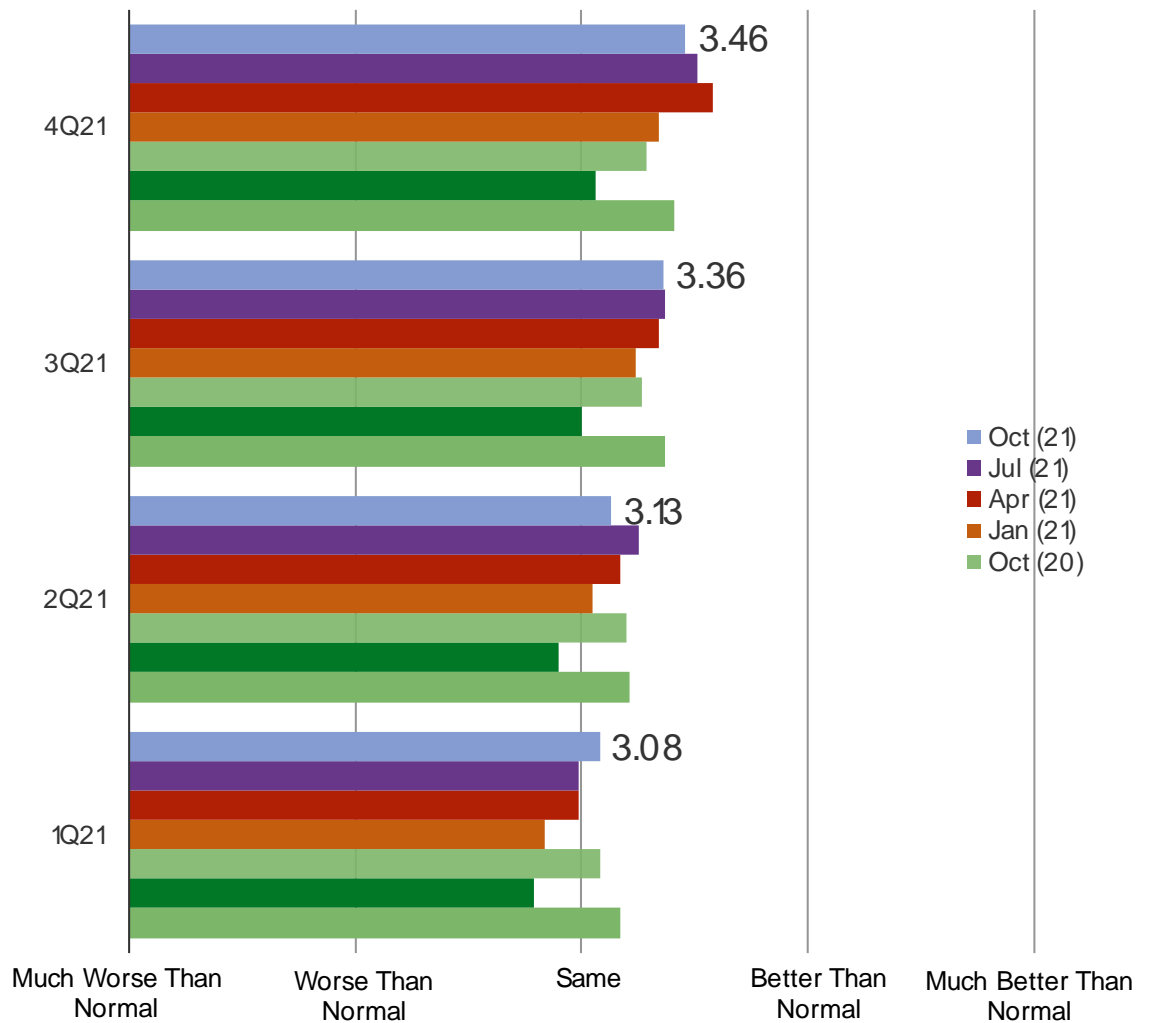
This question was posed to the target audience.



*Fill-in question

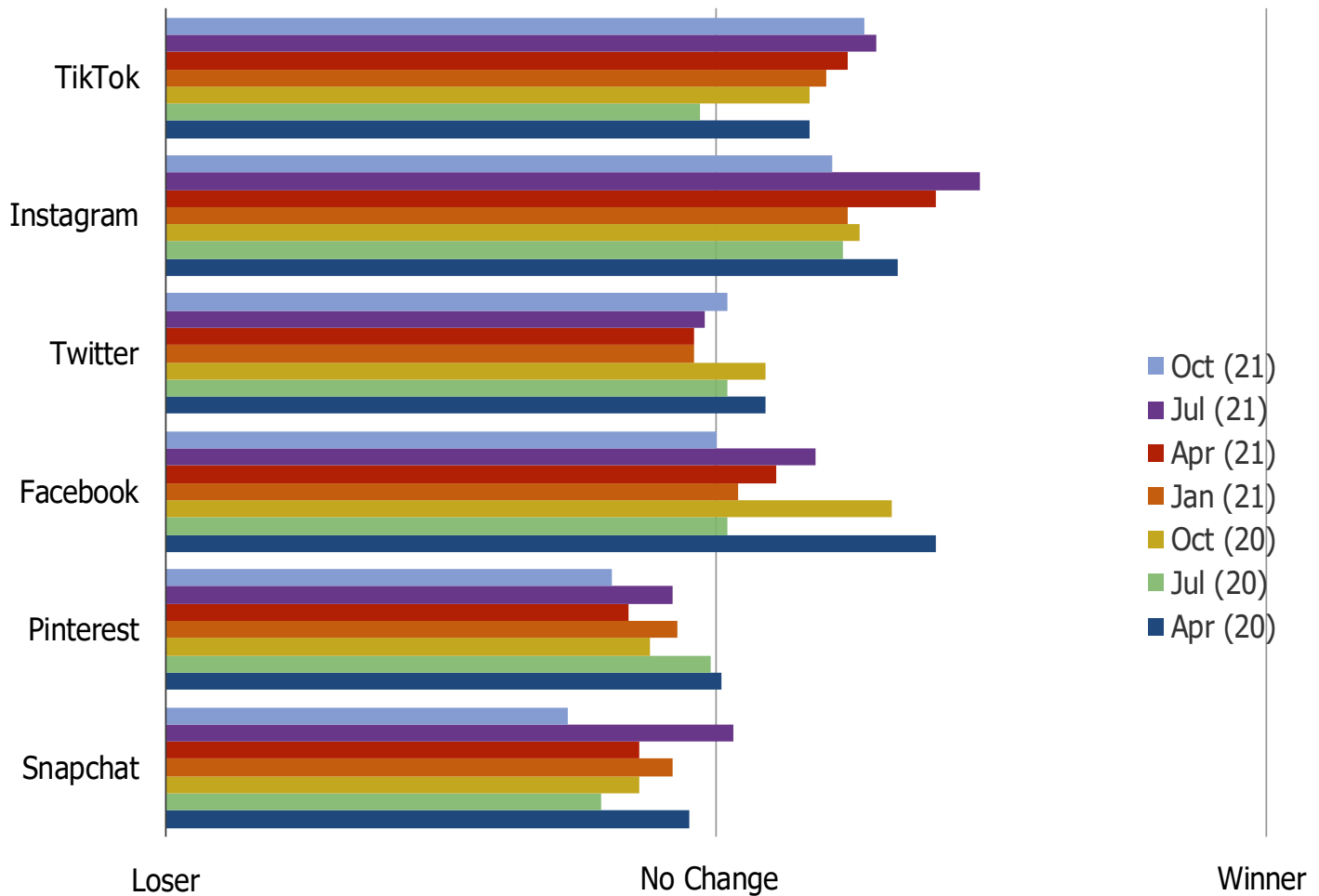
WHAT IS YOUR ASSESSMENT OF SOCIAL MEDIA AD SPENDING COMPARED TO NORMAL FOR EACH OF THE FOLLOWING TIME PERIODS?

This question was posed to the target audience.



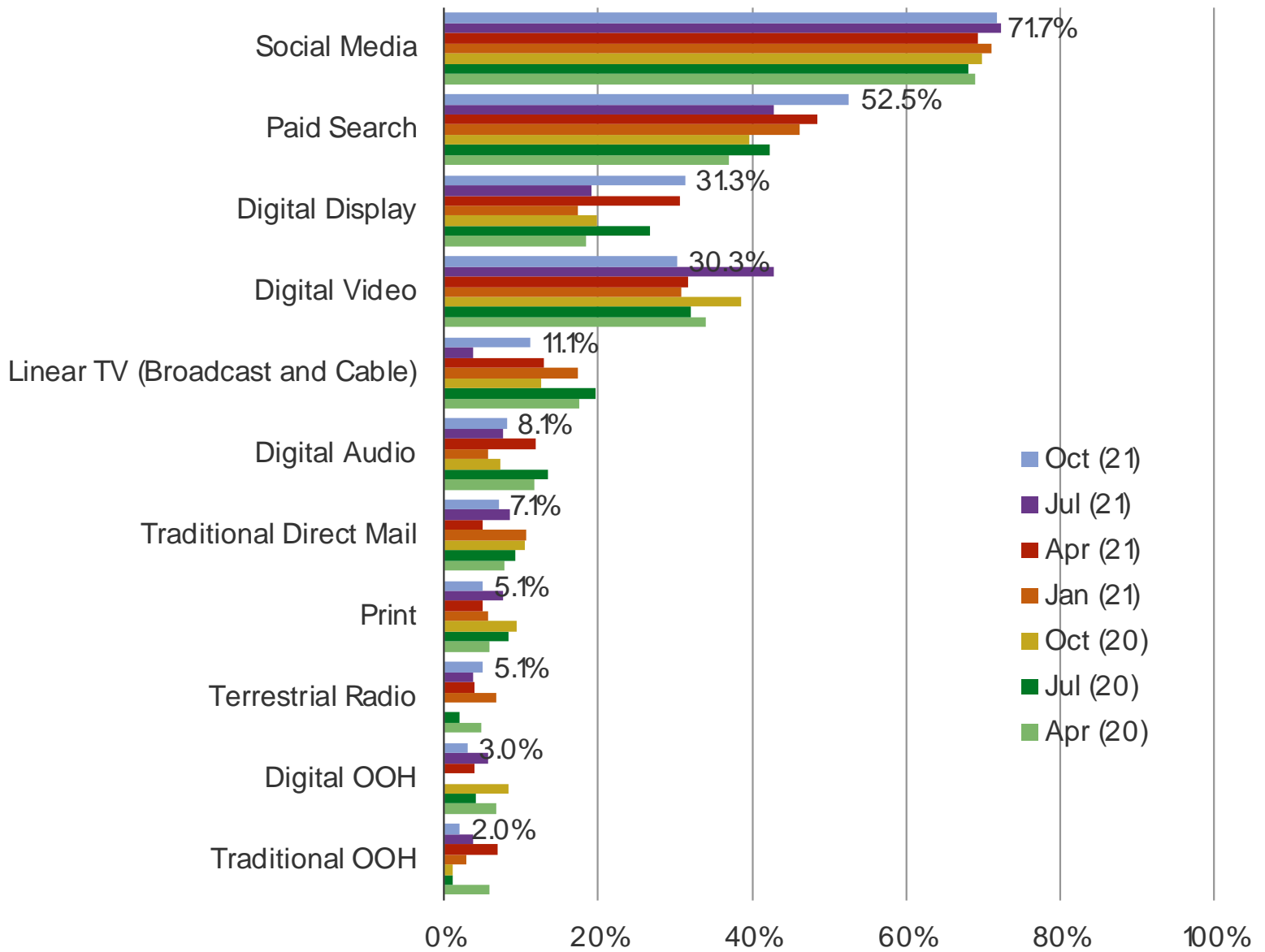
IN THE NEXT 3-6 MONTHS, DO YOU EXPECT THE FOLLOWING TO BE A MARKET SHARE WINNER OR LOSER?

This question was posed to the target audience.



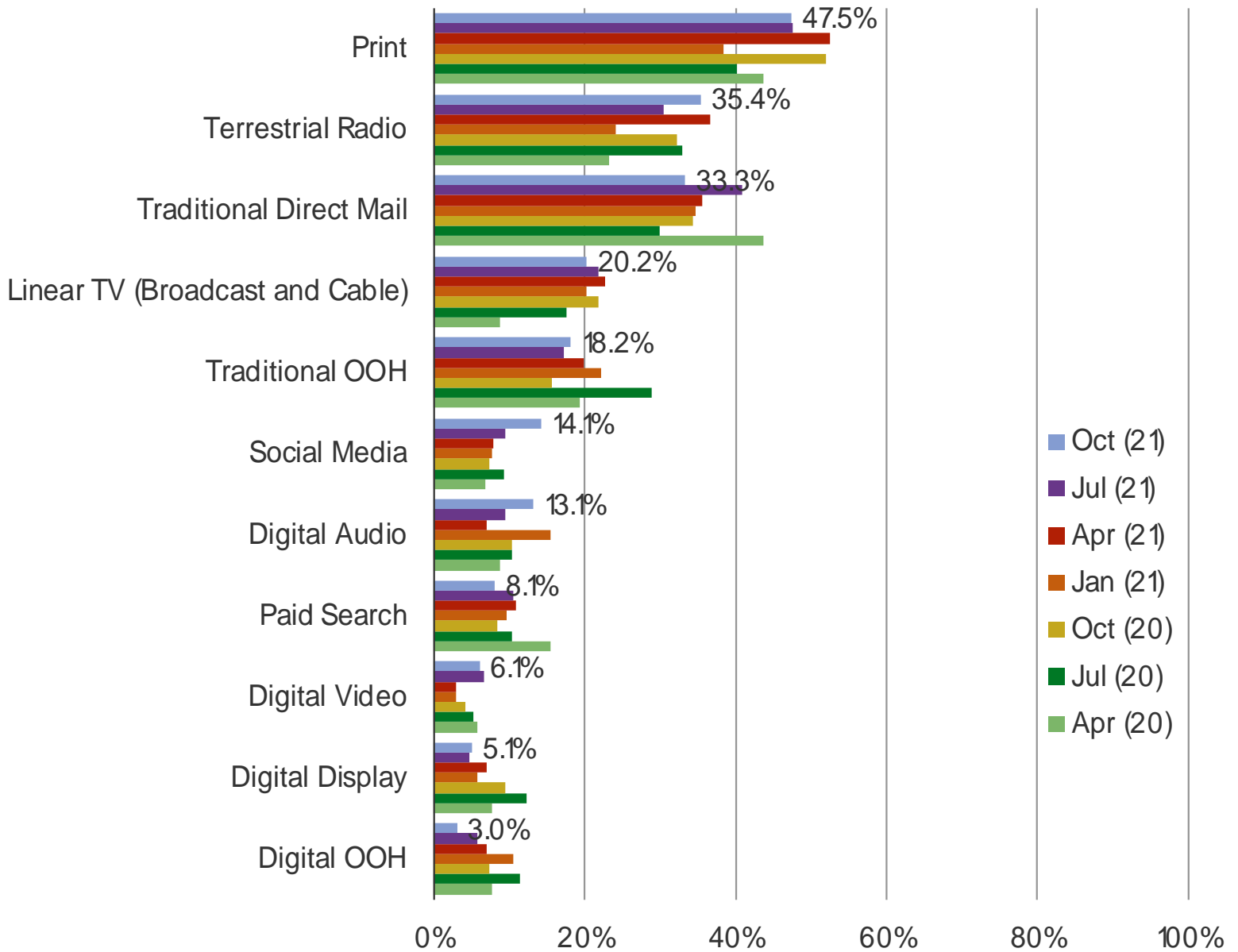
WHICH FORMS OF ADVERTISING DO YOU BELIEVE WILL FARE **THE BEST** OVER THE NEXT 3-6 MONTHS?
(SELECT UP TO THREE CHOICES)

This question was posed to the target audience.



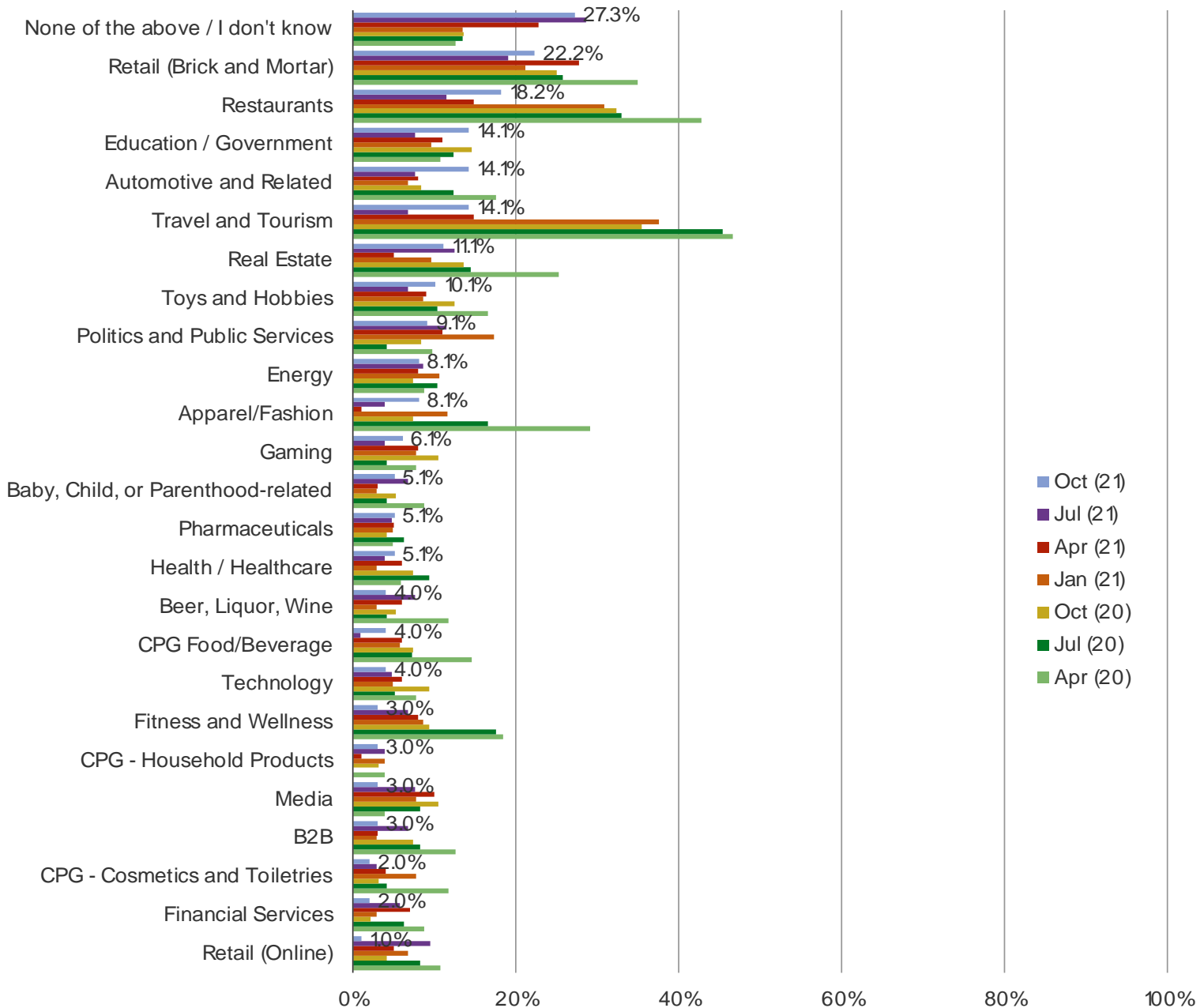
WHICH FORMS OF ADVERTISING DO YOU BELIEVE WILL FARE **THE WORST** OVER THE NEXT 3-6 MONTHS?
(SELECT UP TO THREE CHOICES)

This question was posed to the target audience.



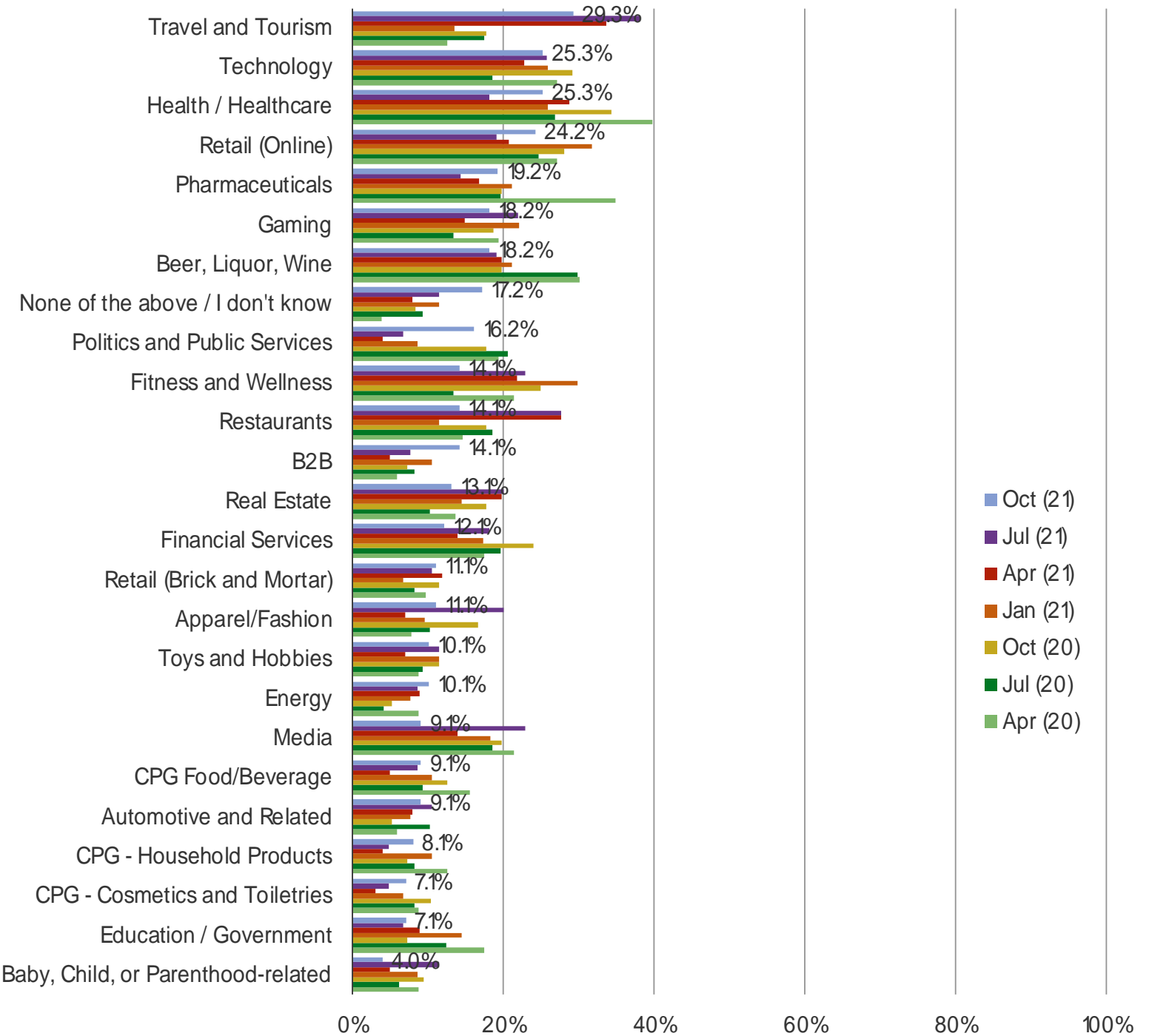
WHICH CLIENT TYPES HAVE BEEN/DO YOU EXPECT TO DECREASE AD SPENDING GOING FORWARD?

This question was posed to the target audience.



WHICH CLIENT TYPES HAVE BEEN/DO YOU EXPECT TO INCREASE AD SPENDING GOING FORWARD?

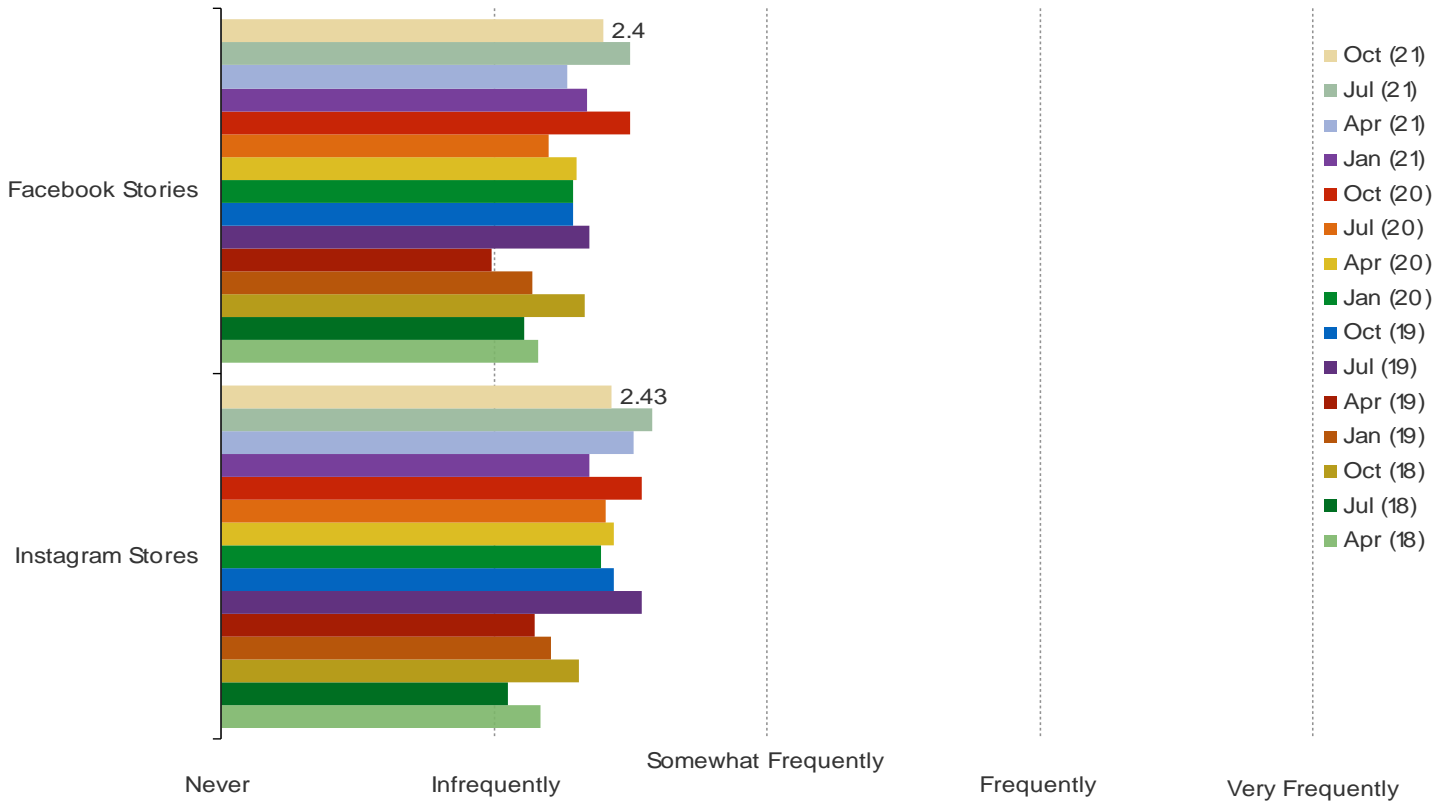
This question was posed to the target audience.



FB SPECIFIC INITIATIVES

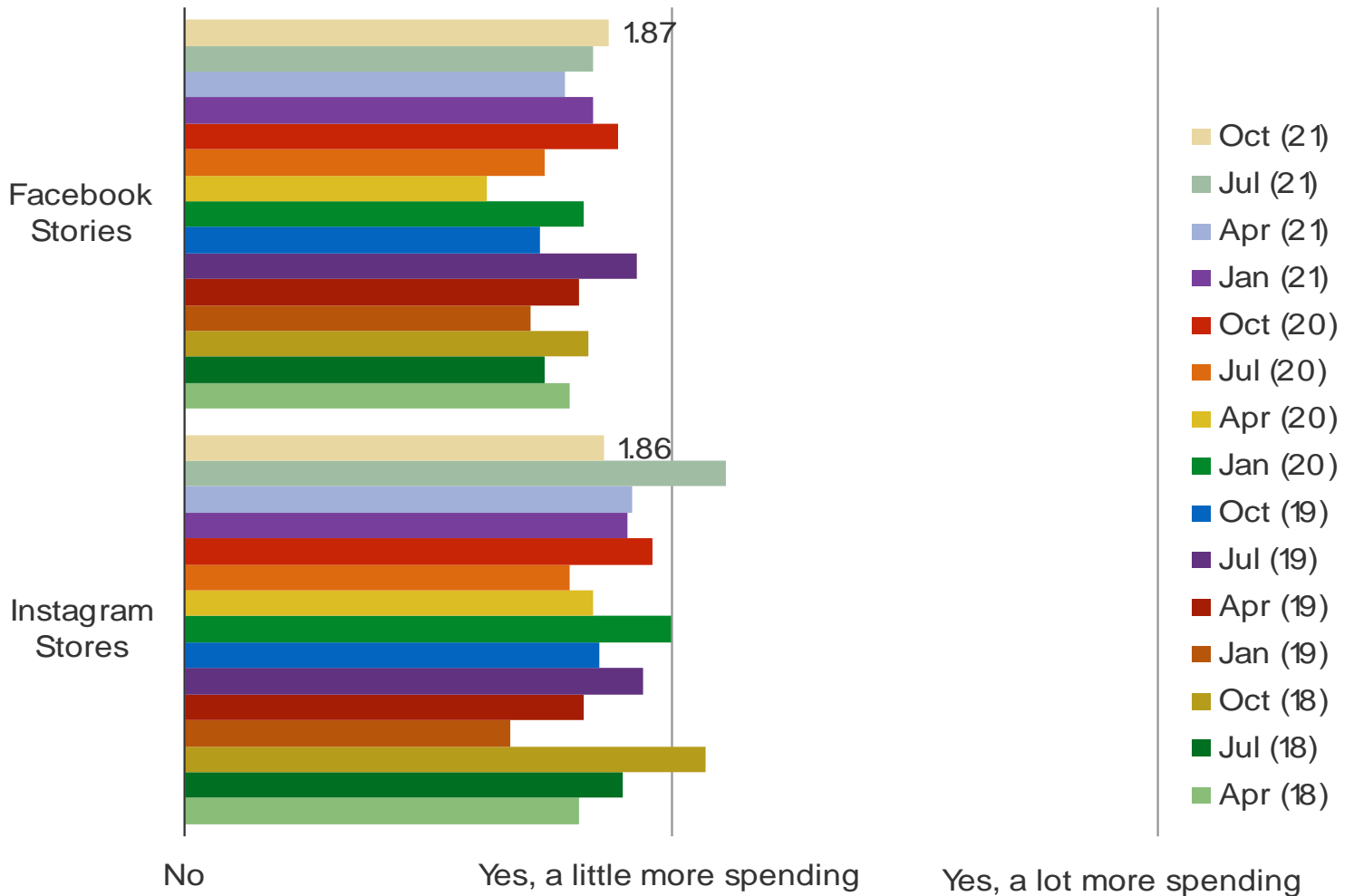
DO YOUR CLIENTS USE FACEBOOK OR INSTAGRAM STORIES TO ADVERTISE?

This question was posed to the target audience.



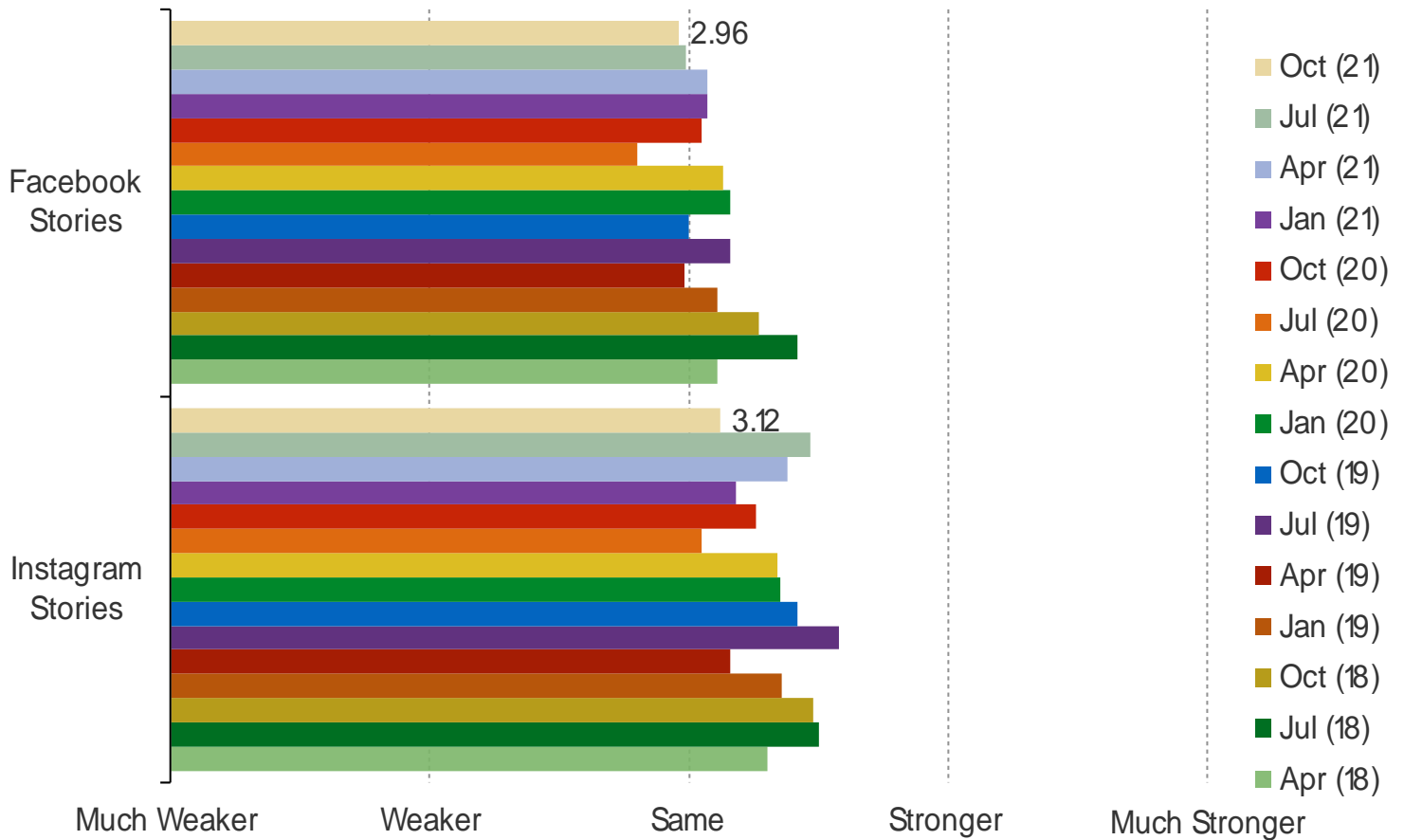
HAS CLIENT USAGE OF STORIES INCREASED AD SPENDING WITH THE PLATFORM IN GENERAL?

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



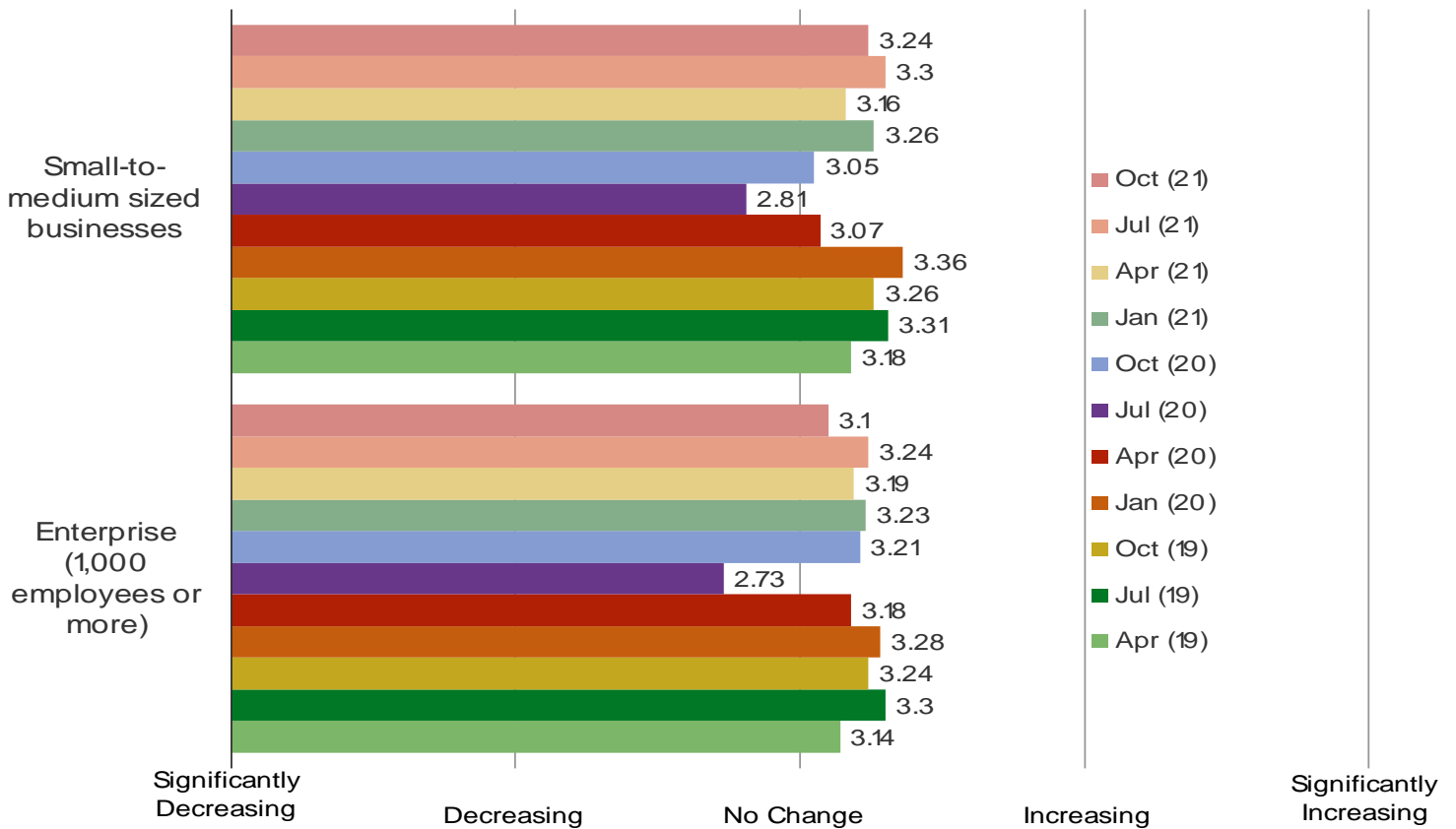
COMPARED TO A YEAR AGO, HOW HAS DEMAND FOR INSTAGRAM STORIES AND FACEBOOK STORIES CHANGED?

This question was posed to the target audience.



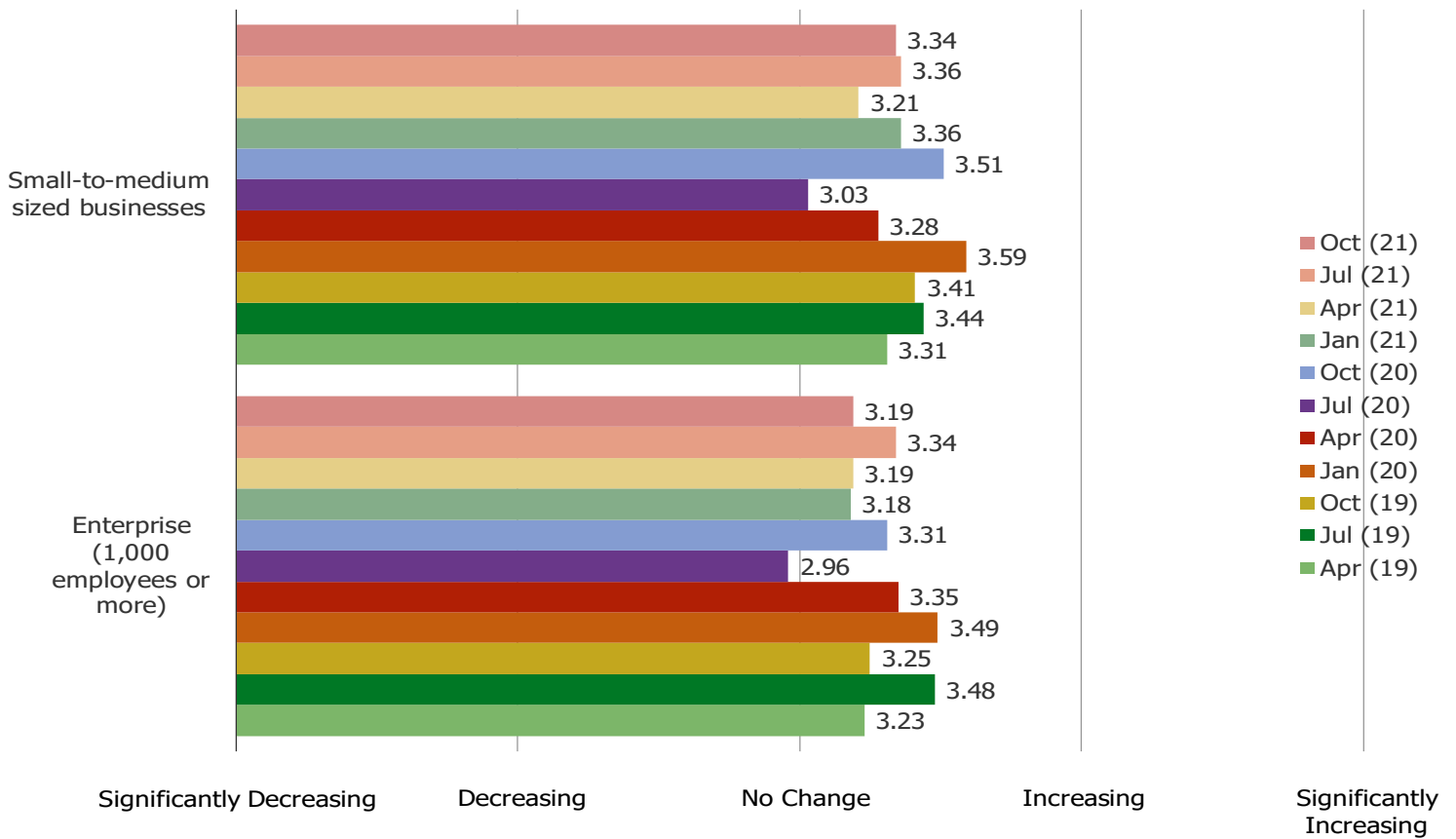
HAVE THE FOLLOWING CLIENT TYPES BEEN INCREASING OR DECREASING THEIR SPENDING ON FACEBOOK ADVERTISING?

This question was posed to the target audience.



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

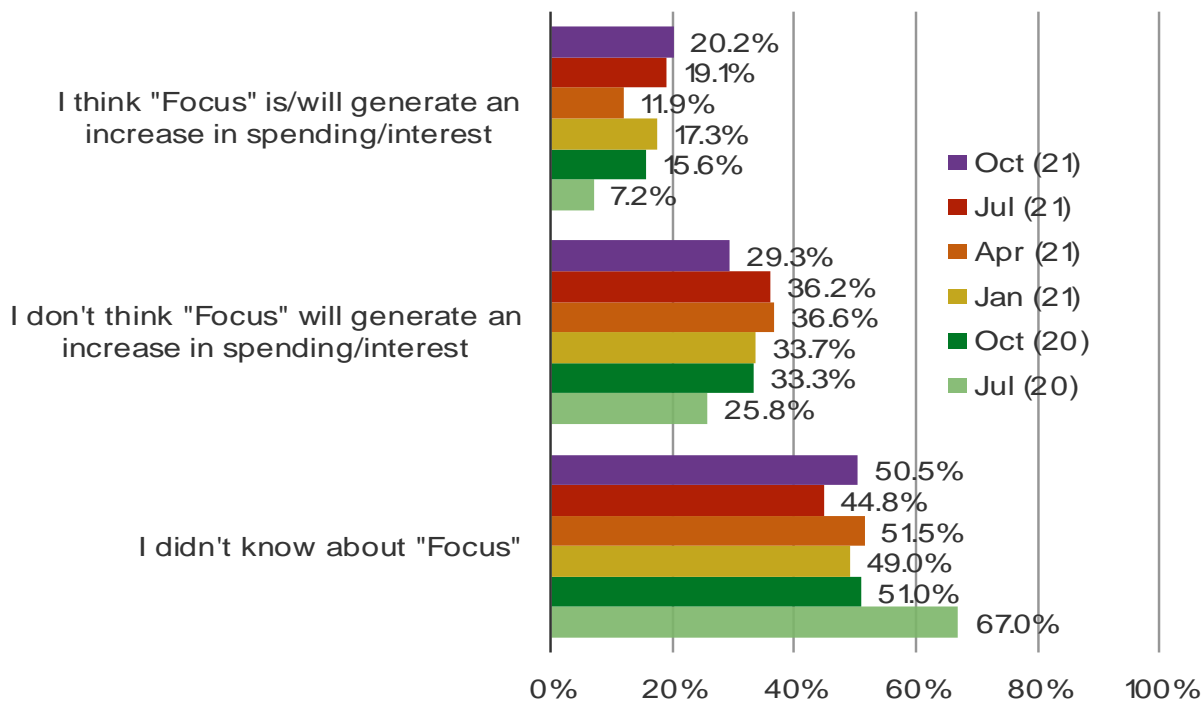
This question was posed to the target audience.



SNAPCHAT FOCUS

HAS SNAPCHAT'S LAUNCH OF "FOCUS" FOR ADVERTISERS (MODULE BASED TRAINING FOR ADVERTISERS AND BRANDS FOR GETTING THE MOST OUT OF THE PLATFORM'S AD OPTIONS) CAUSED AN INCREASE IN INTEREST FOR AD SPENDING?

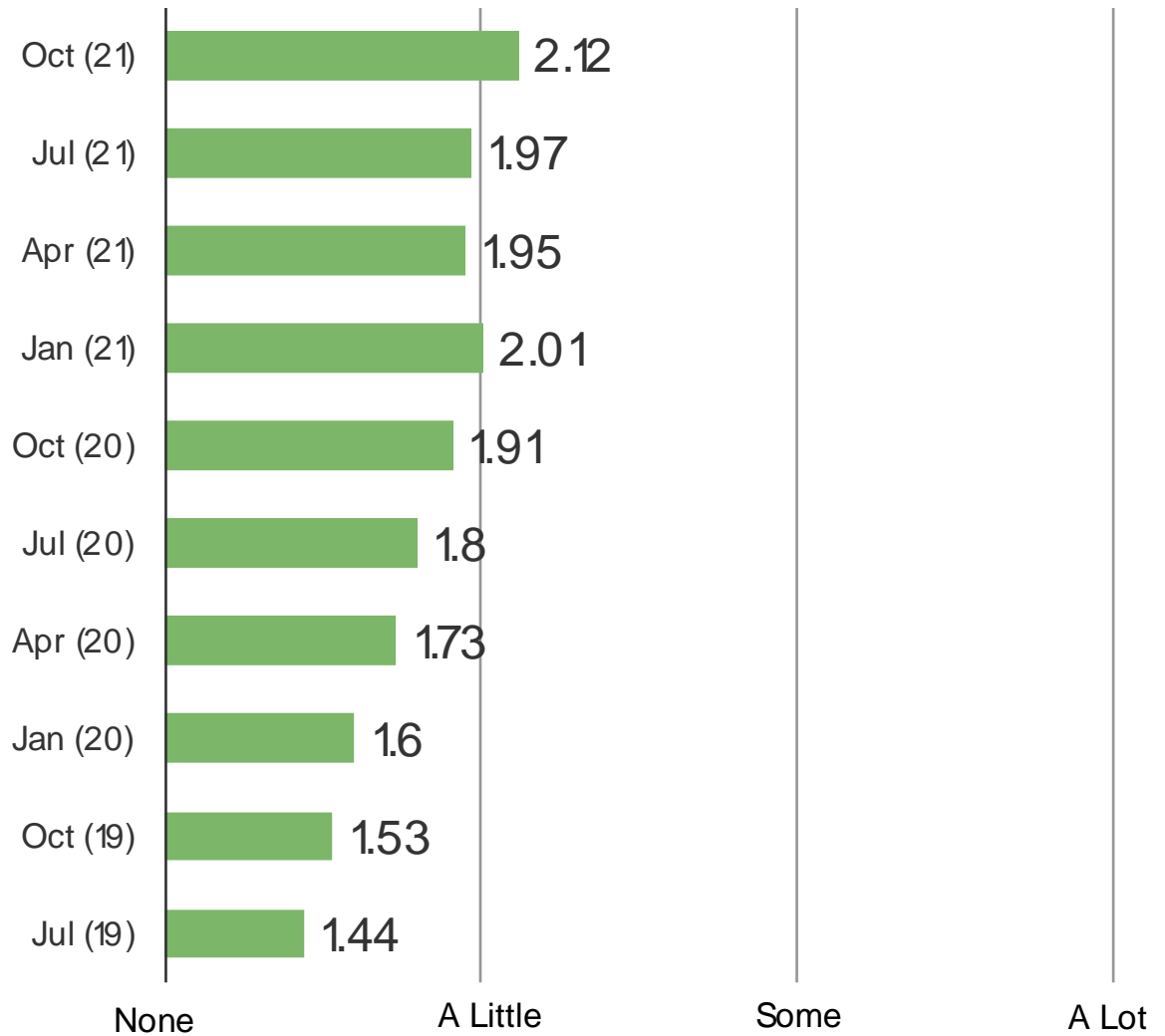
This question was posed to the target audience.



TIK TOK

DO YOUR CLIENTS HAVE ANY INTEREST IN TIK TOK?

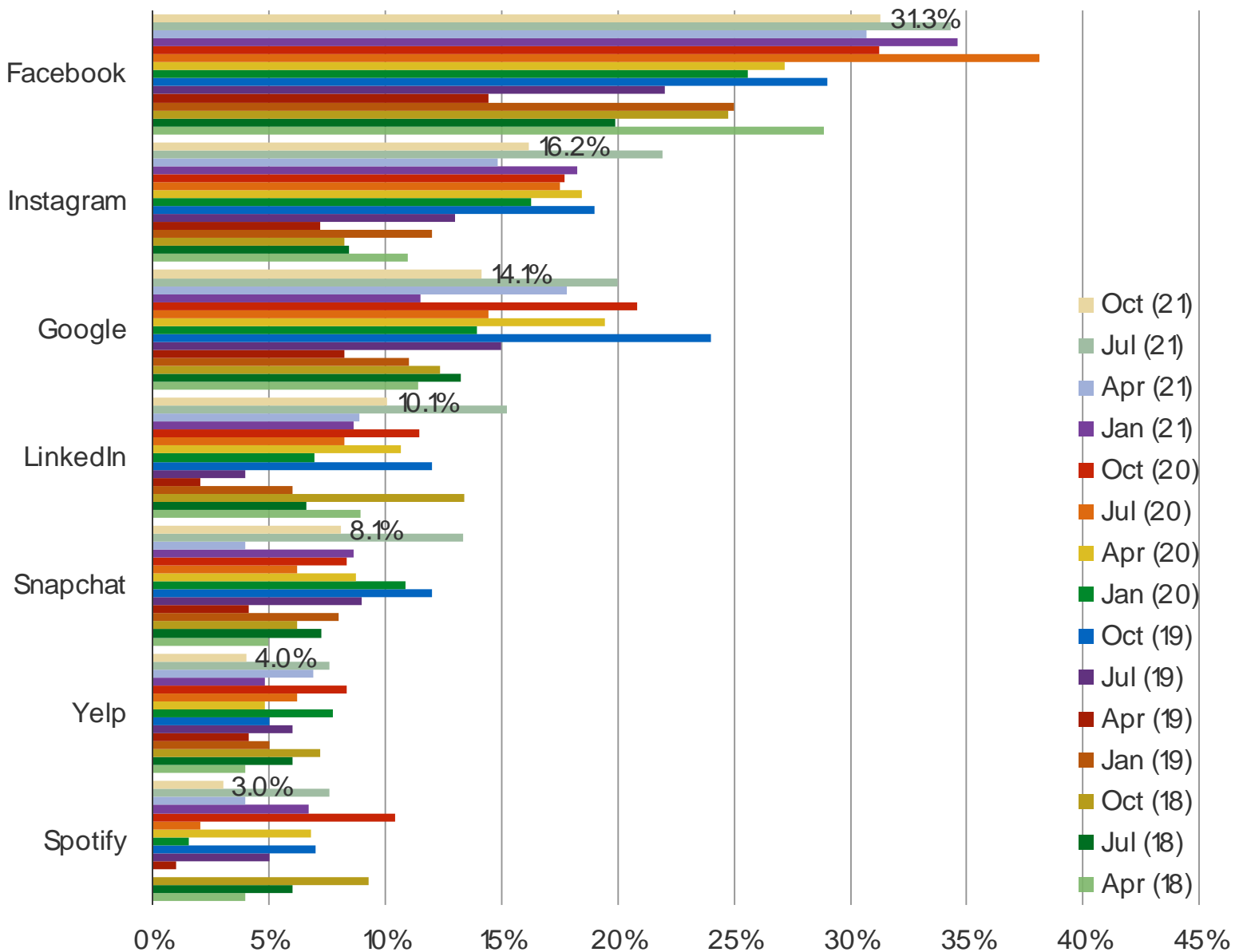
This question was posed to the target audience.



CUSTOMER CONCERNS WITH PLATFORMS

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

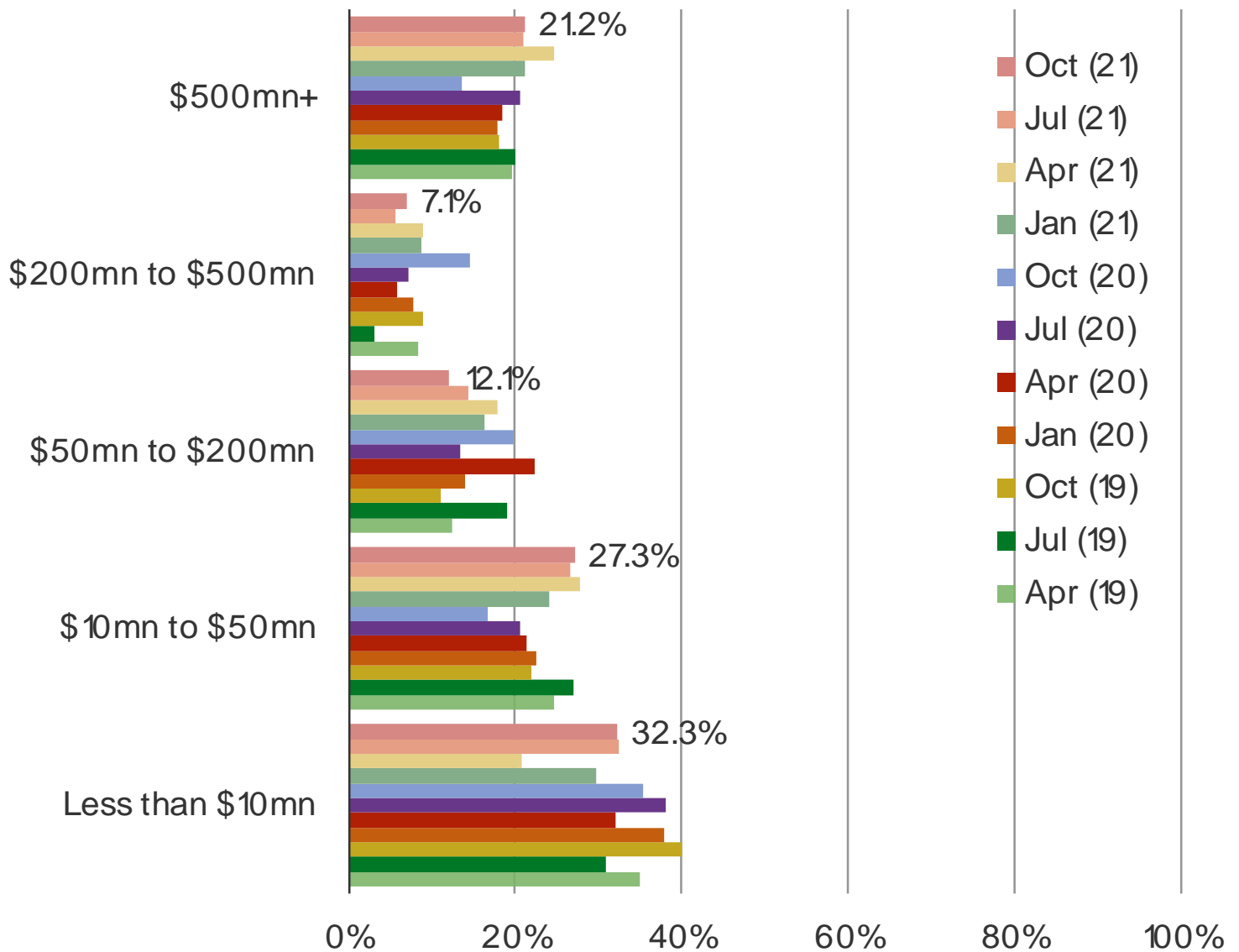
This question was posed to the target audience.



BACKGROUND INFO

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

This question was posed to advertising executives.



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.

