

Bespoke Survey Research

October 2023

Social Media Ad Execs

Volume 23 | Quarterly Survey

100+ US Ad Executives

Tickers Covered: META, SNAP, PINS, GOOG, AMZN, TWTR.

KPIs and Key questions

1. Relative to three months ago, ad execs see/expect weaker levels of demand when Threads by Instagram offers advertising.
2. Looking ahead, respondents think that TikTok, Amazon, and Google are becoming more important.
3. Feedback around ad budgets overall are net positive but worse compared to last quarter (last couple quarters have shown slight declines).
4. Feedback toward most platforms are consistent with prior waves.
5. Respondents think that Amazon, Google, and Instagram will be share winners in the next 3-6 months.

Noteworthy Stats:

36.6% Of respondents said ad budgets are higher relative to one year ago.

20.8% Of respondents said ad budgets are lower to much lower relative to one year ago.

81.2% Of respondents said their clients currently have advertising campaigns with Facebook.

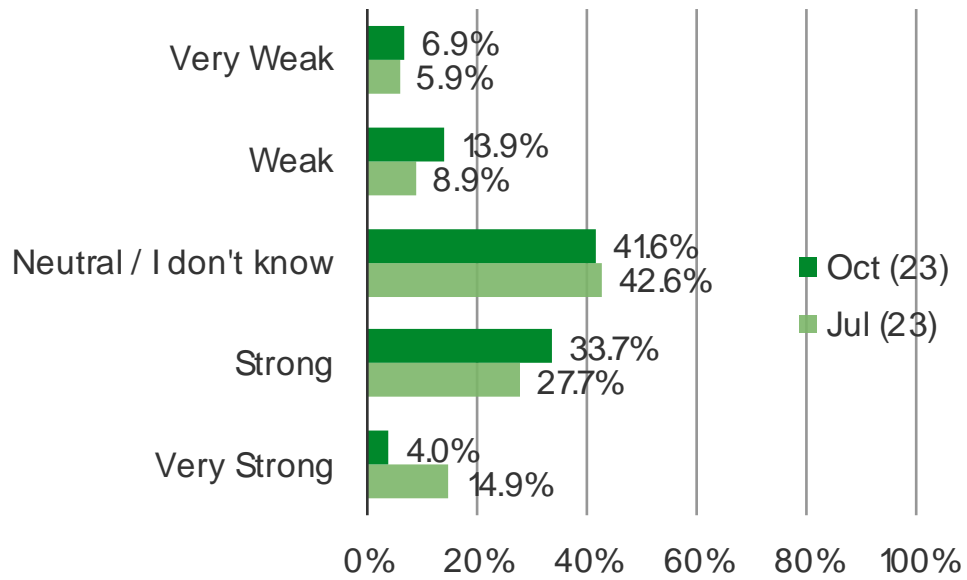
71.3% Of respondents said their clients currently have advertising campaigns with Google.

4.0% Of respondents said that demand will be “very strong” when Threads offers advertising.

NEW QUESTIONS

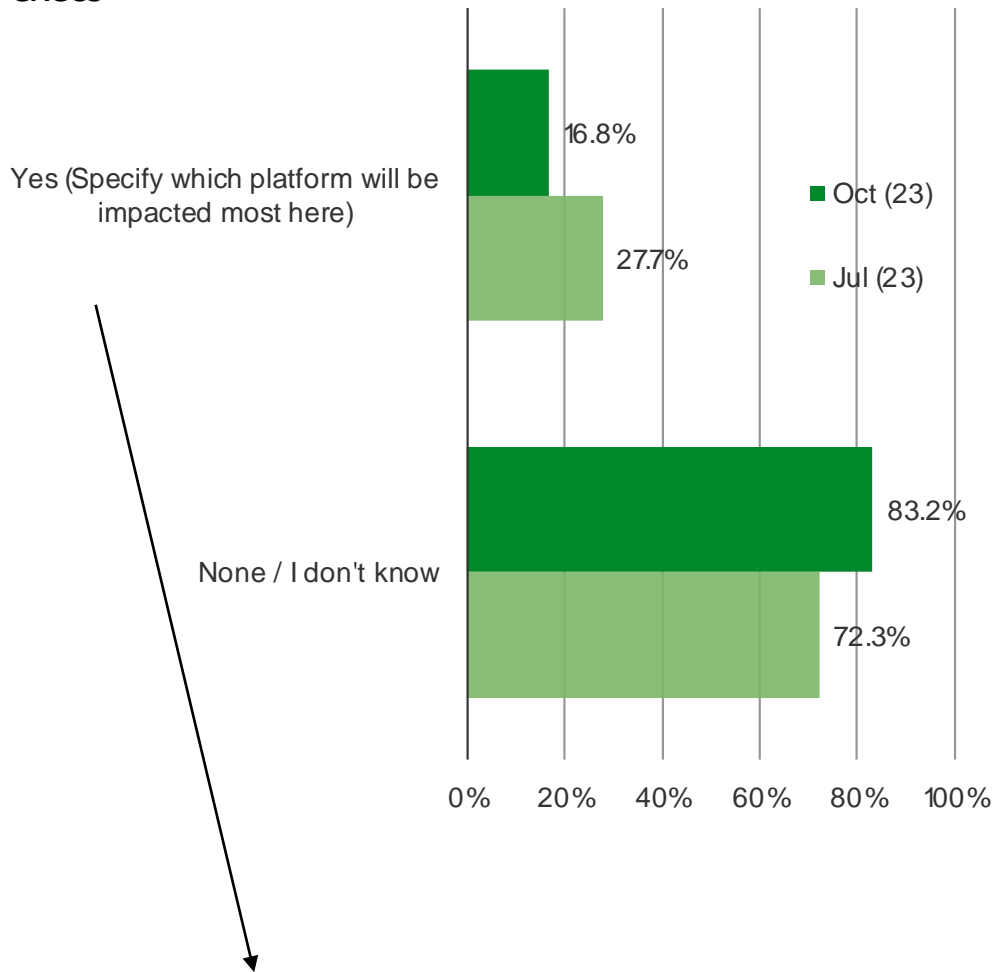
WHEN THREADS BY INSTAGRAM OFFERS ADVERTISING, HOW MUCH DEMAND DO YOU THINK THERE WILL BE FROM YOUR CLIENTS TO ADVERTISE ON THE PLATFORM?

*Posed to ad execs



IN YOUR OPINION, WHICH SOCIAL MEDIA PLATFORM IS MOST LIKELY TO BE NEGATIVELY IMPACTED FROM AN ADVERTISING POINT OF VIEW BY THREADS BY INSTAGRAM?

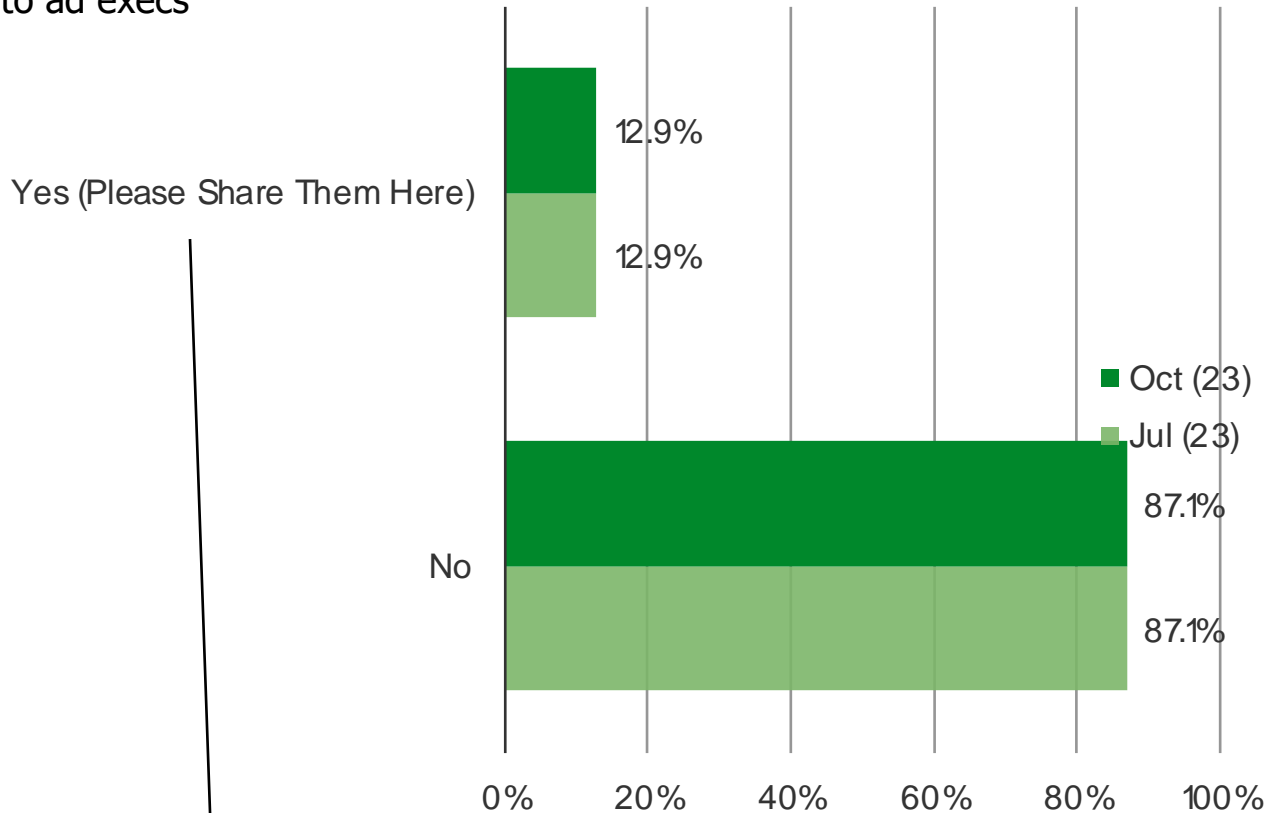
*Posed to ad execs



TWITTER
FACEBOOK PINTEREST POSITIVE YELP GOOD INSTANFACEBOOK AMAZON

DO YOU HAVE ANY THOUGHTS TO SHARE ON THE THREADS APP BY INSTAGRAM AND WHAT KIND OF IMPACT IT MIGHT HAVE ON THE SOCIAL MEDIA ADVERTISING SPACE?

*Posed to ad execs



- Threads app by Instagram did not garner enough steam to compete in any way with other alternative social media
- It won't have much they have a decline in users and most are already on Instagram and Facebook
- They are shooting themselves in the foot with their speech restrictions, so people will flock to twitter instead.
- in the beginning many would probably get the app. but with time it would turn to normal
- It was a popular app for about a week and then I never heard about it again. I tried using it and thought it was terrible.
- Threads has declined in popularity significantly so feel like ad spend here would be a waste
- It is trying to compete with Twitter and will lose
- Won't have a significant impact
- Most of my clients are skeptical

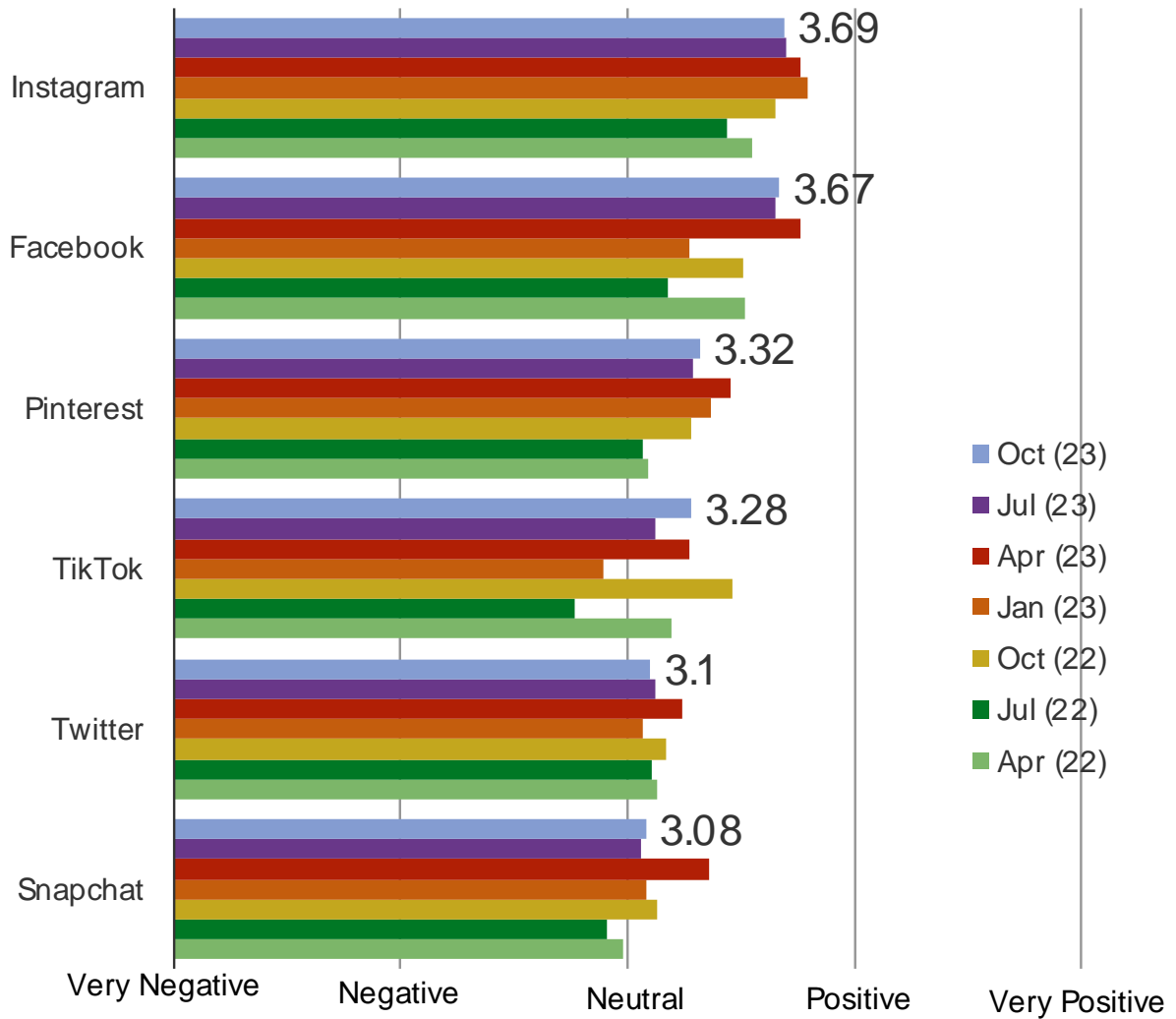
SENTIMENT TOWARD PLATFORMS

Among respondents who have campaigns with each of the following (N's below)

	N=
Facebook	82
TikTok	37
Twitter	25
Google	72
Instagram	57
Pinterest	18
Snapchat	20
Amazon	37

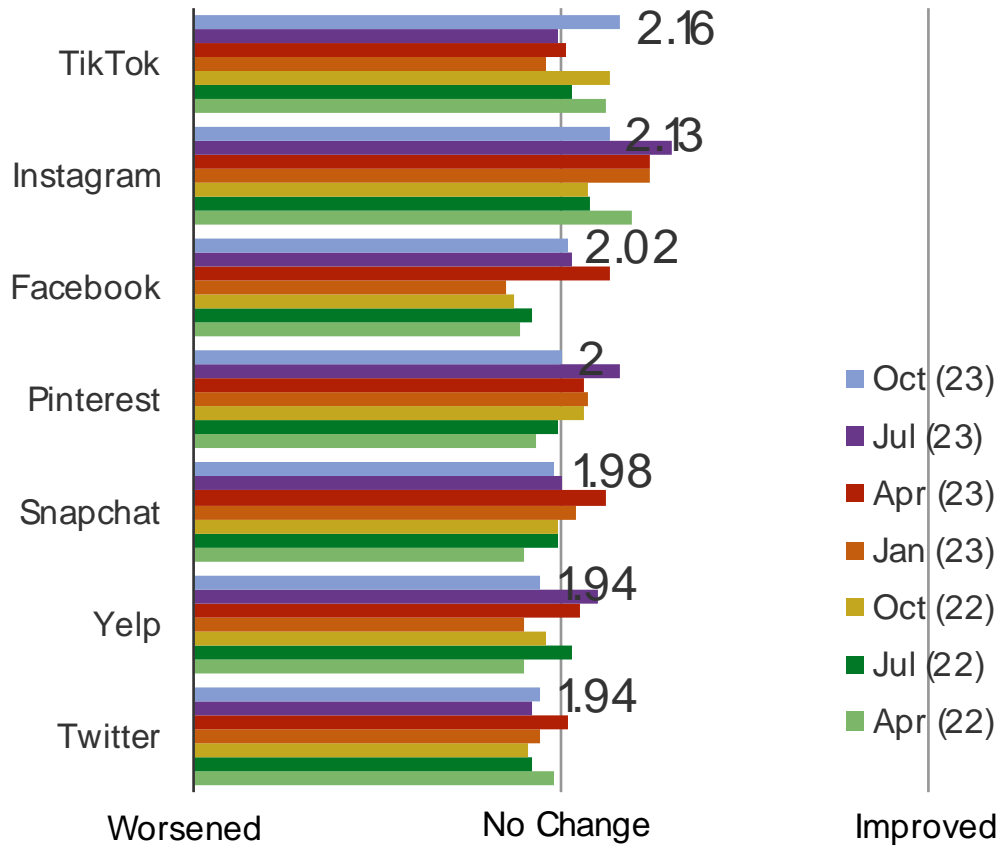
WHAT IS YOUR OPINION OF THE FOLLOWING PLATFORMS FROM A MARKETING/ADVERTISING PERSPECTIVE?

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



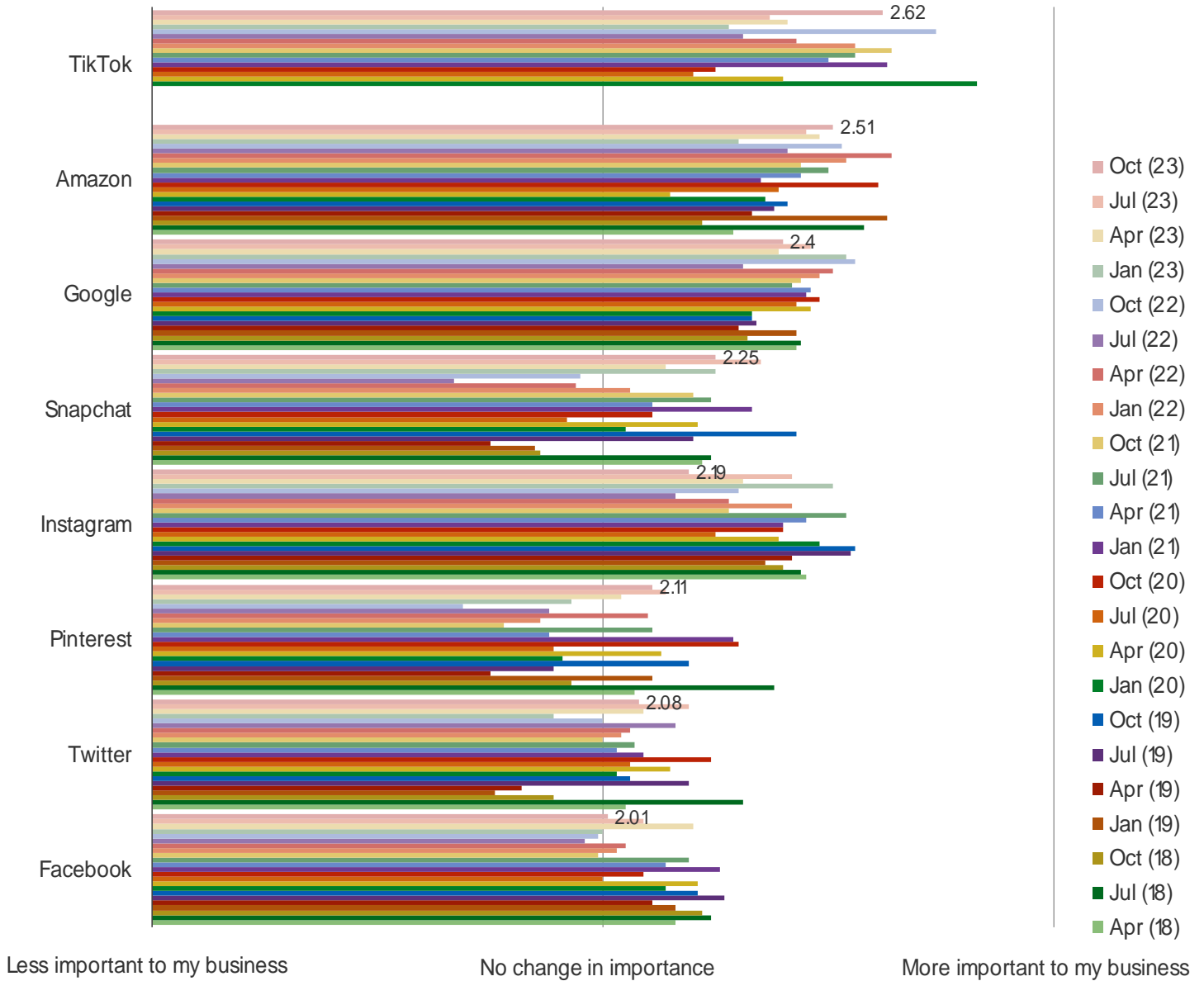
HAS YOUR OPINION OF THE FOLLOWING CHANGED AT ALL IN THE PAST 12-24 MONTHS?

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

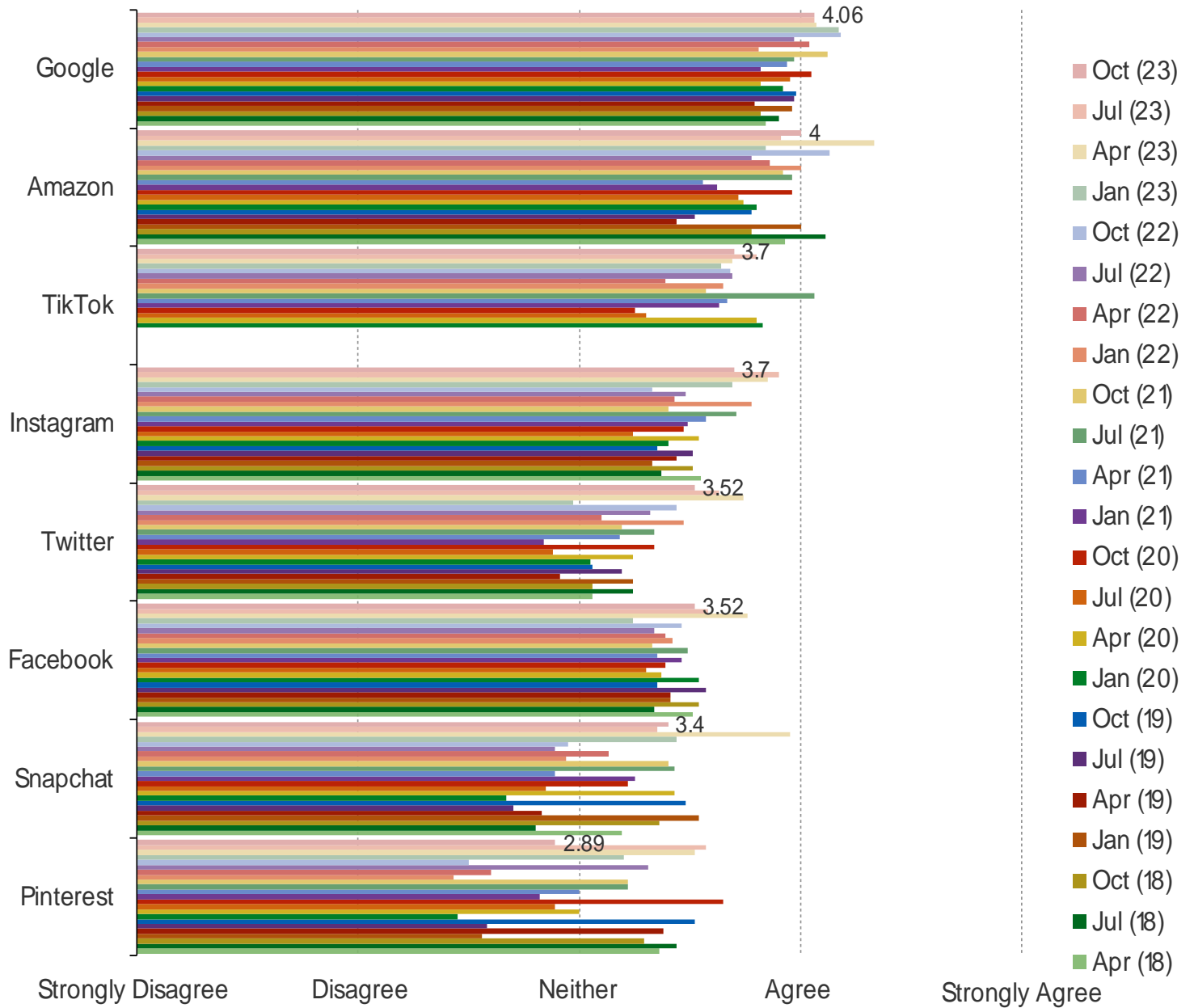


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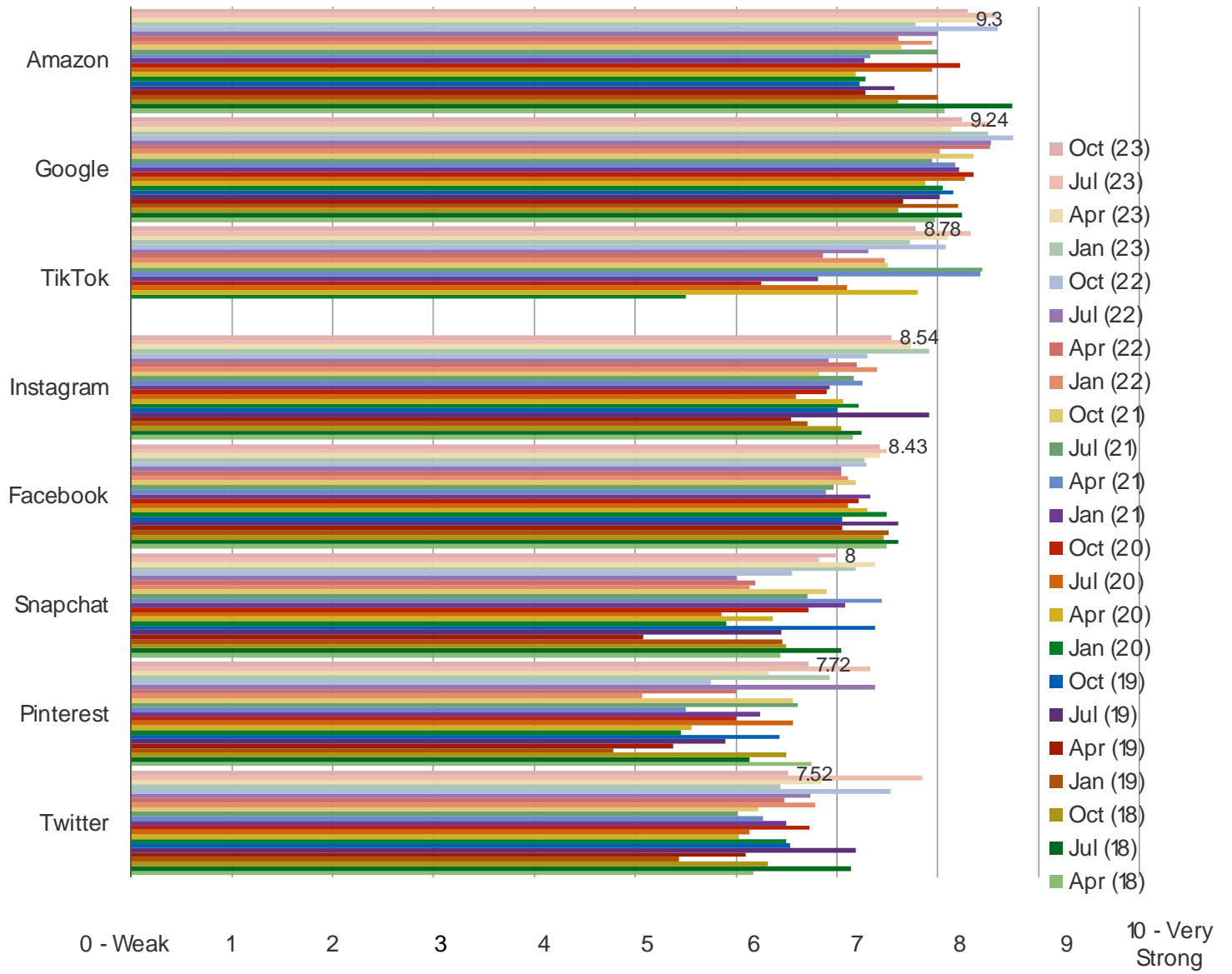
PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENT: "IF IT WENT AWAY TOMORROW, IT WOULD BE DETRIMENTAL TO MY BUSINESS"

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



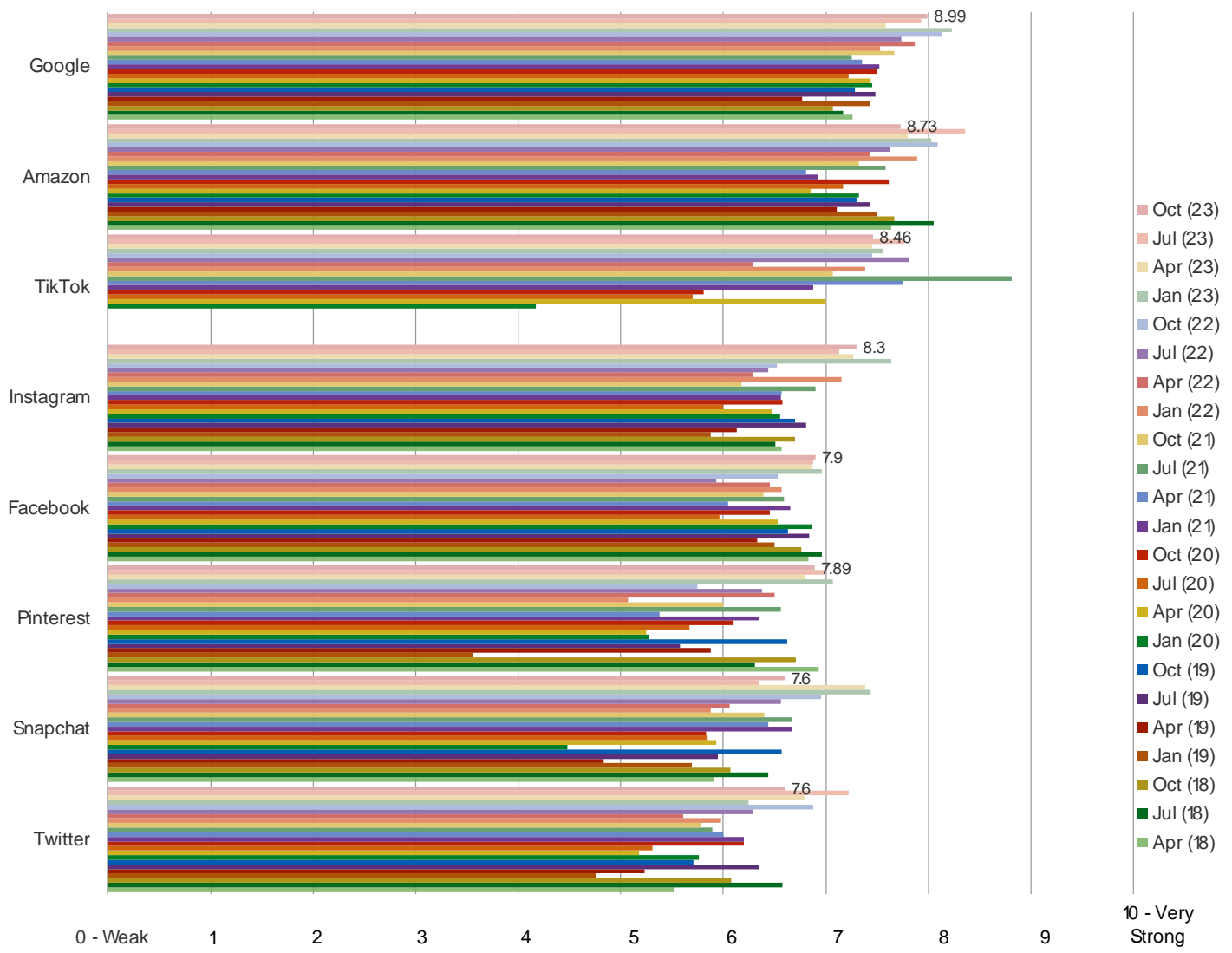
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVERS WHEN IT COMES TO REACH?

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



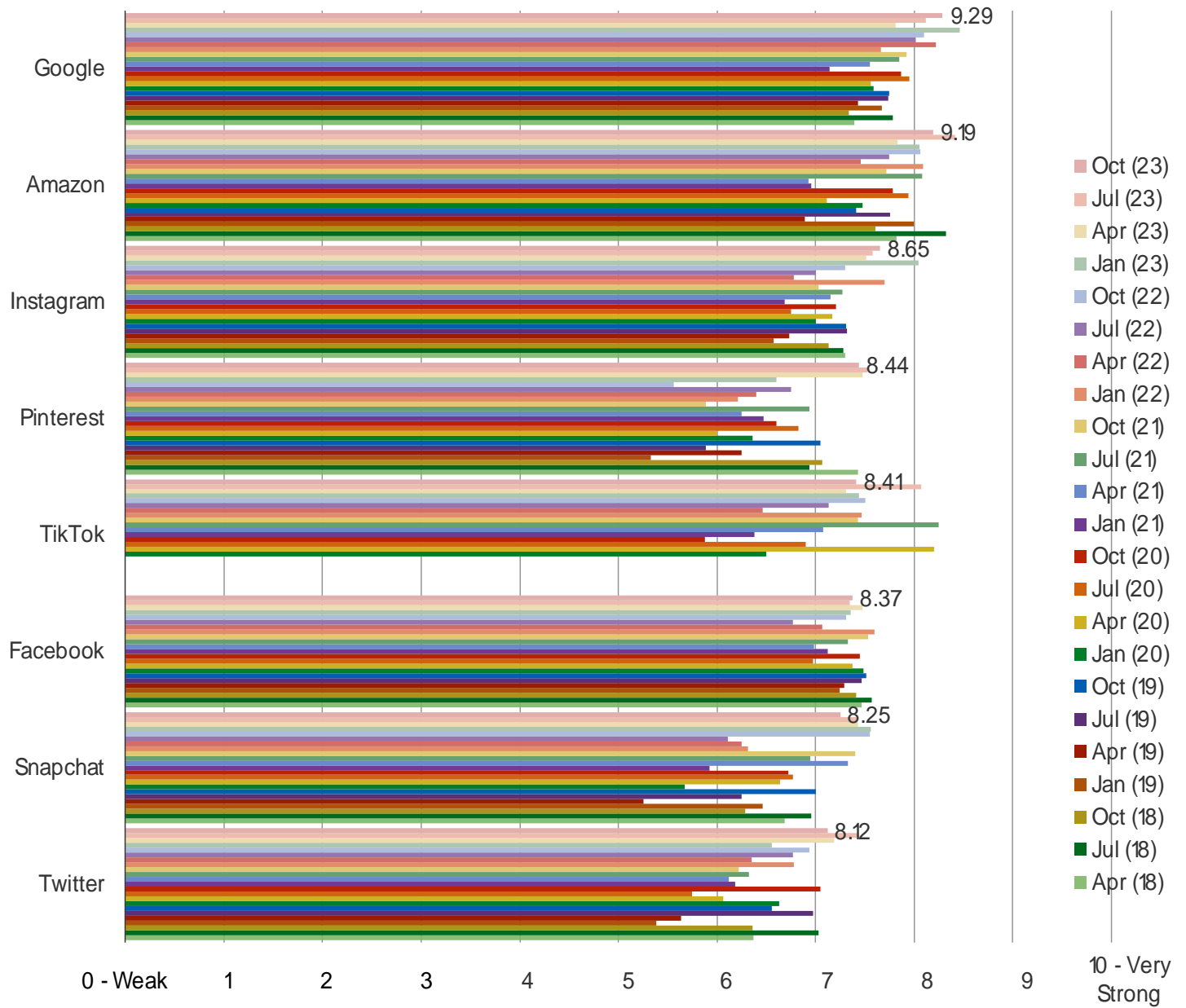
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO RETURN ON ADVERTISING INVESTMENT?

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



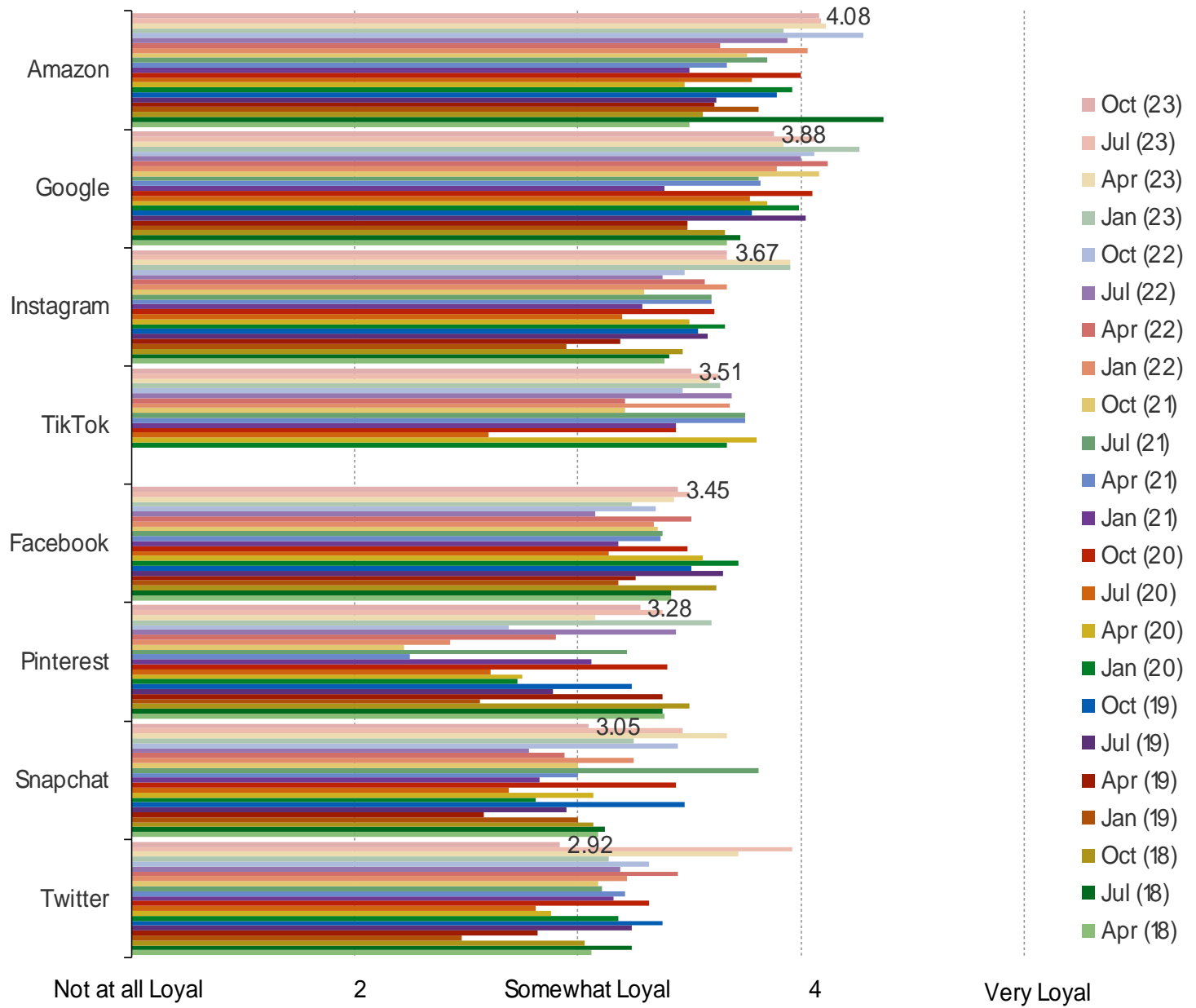
WHAT IS YOUR OPINION ON HOW STRONG EACH OF THE FOLLOWING PLATFORMS DELIVER WHEN IT COMES TO TARGETING DATA THEY HAVE ON USERS?

*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?

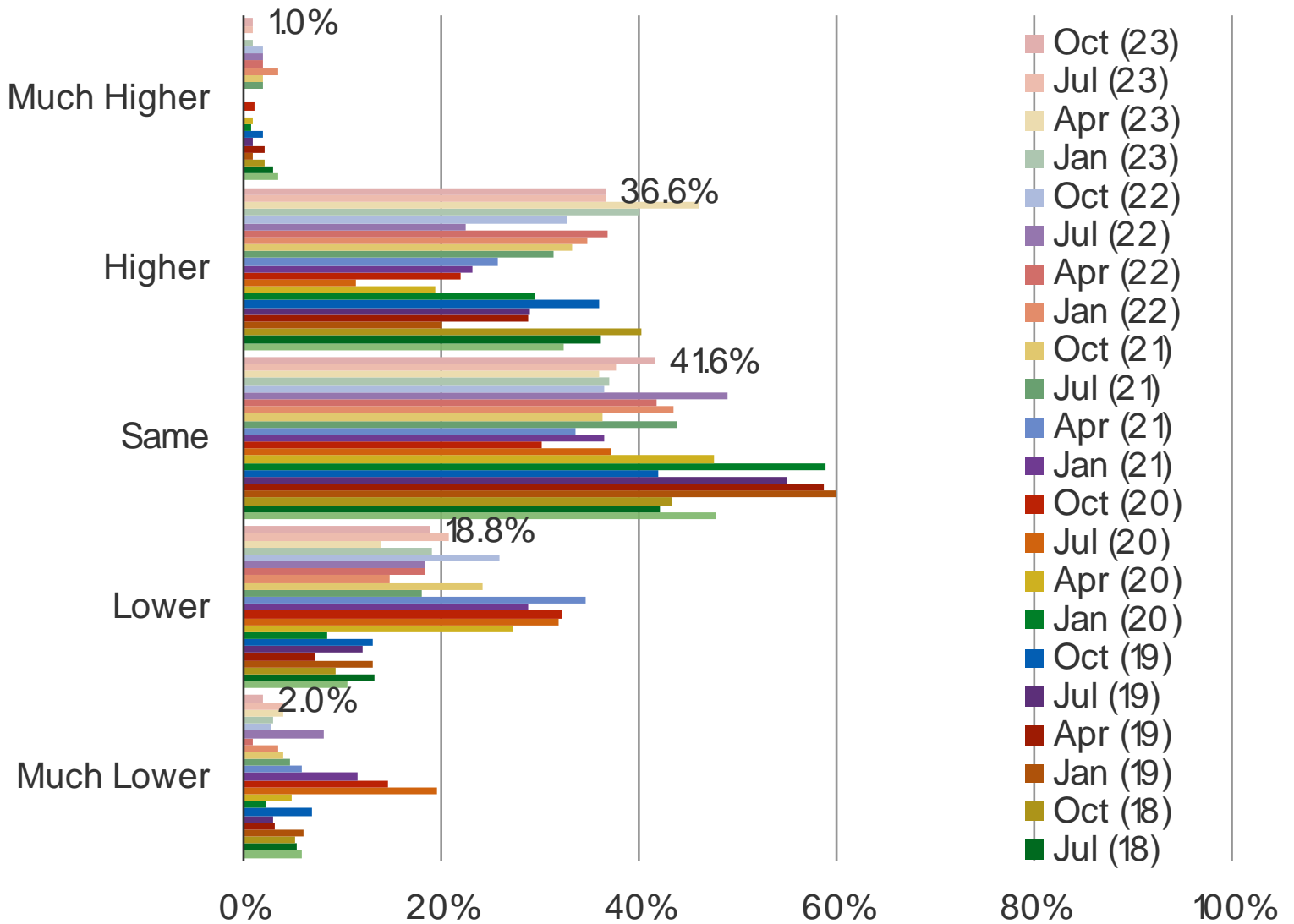
*Posed to ad execs whose clients have paid campaigns with each of the following platforms



AD SPEND HEALTH

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

This question was posed to the target audience.

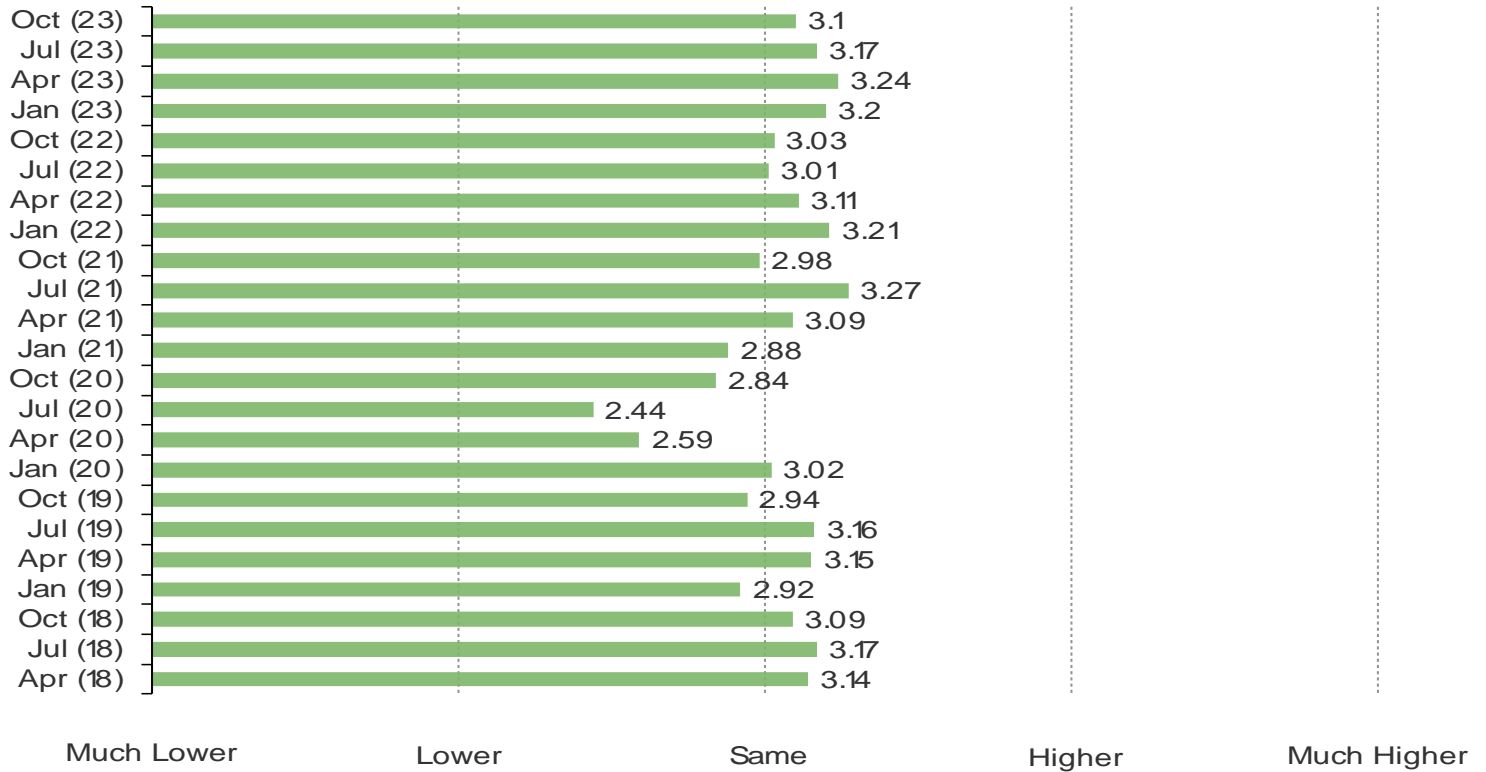


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PLEASE DESCRIBE YOUR CLIENT'S ADVERTISING BUDGETS OVERALL COMPARED TO LAST QUARTER.

This question was posed to the target audience.

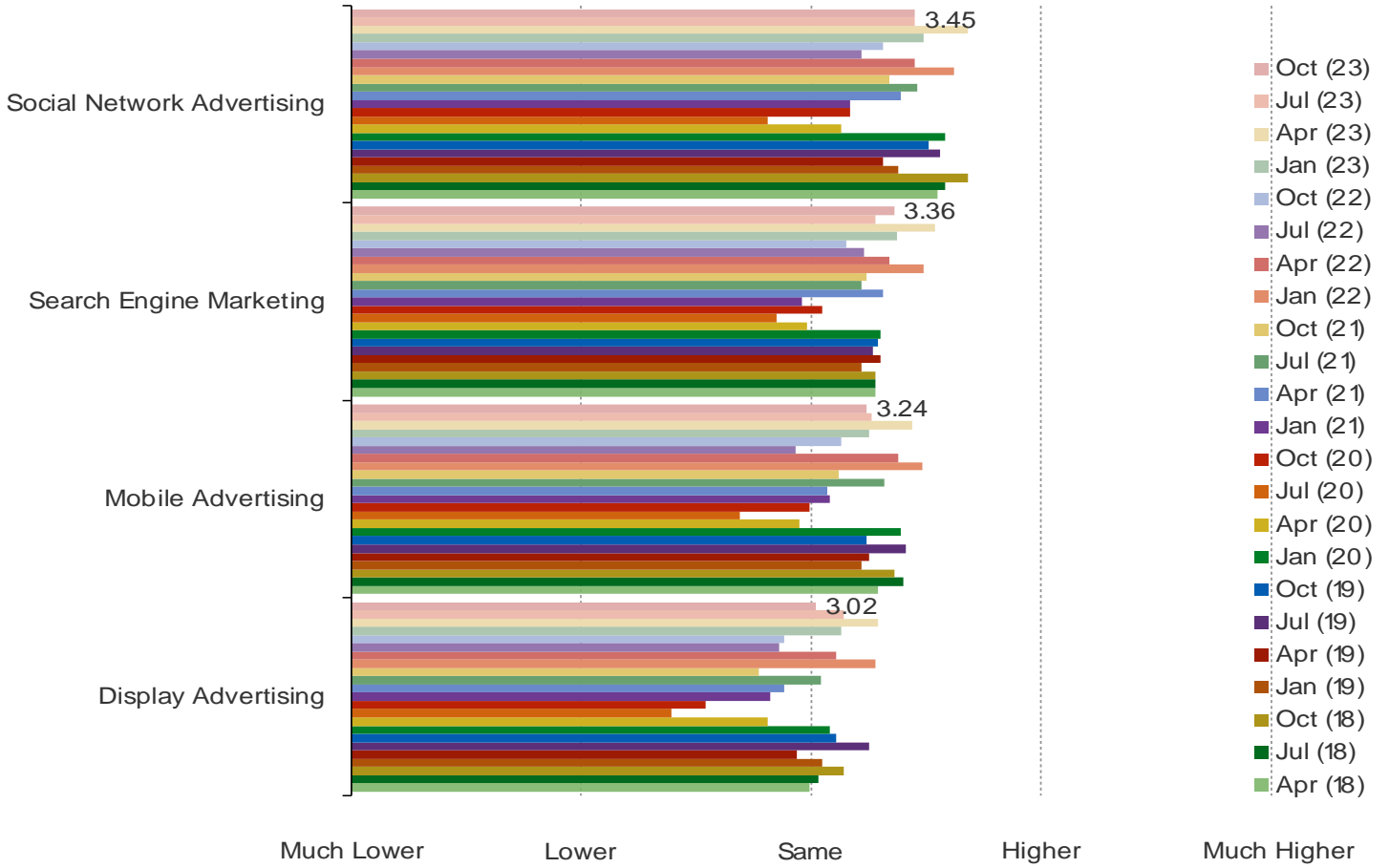


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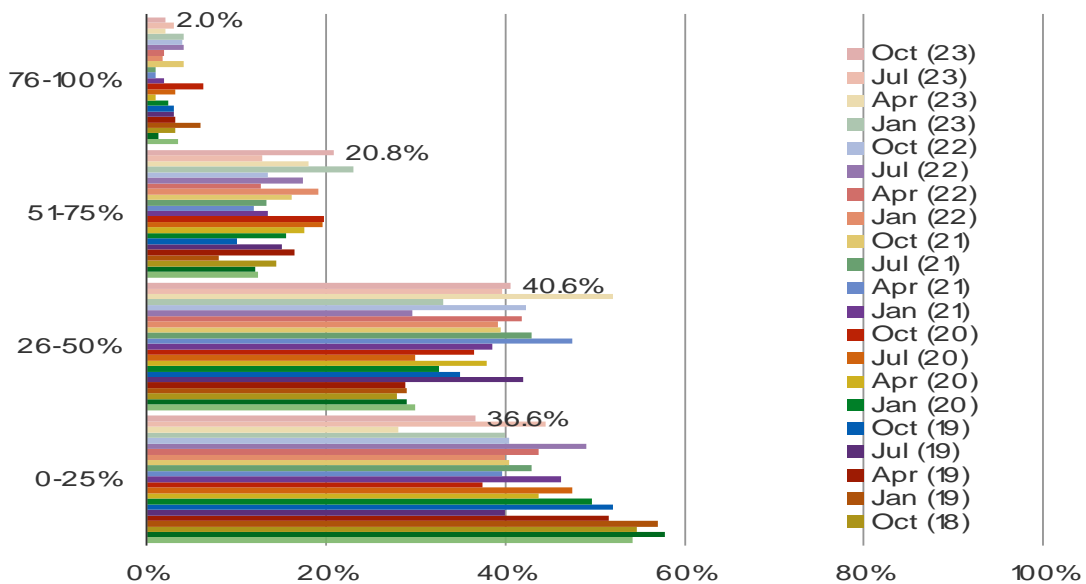
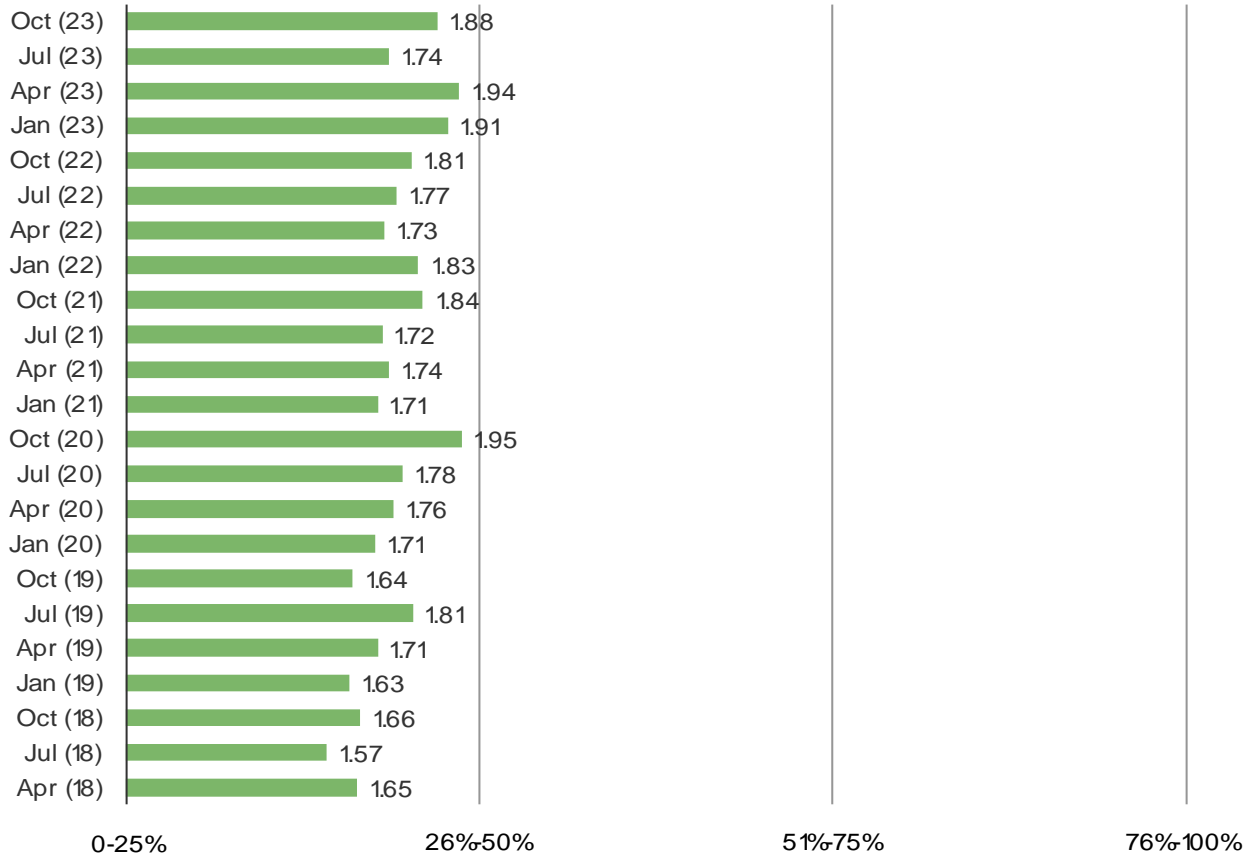
PLEASE COMPARE SPENDING ON EACH OF THE FOLLOWING ADVERTISING METHODS COMPARED TO ONE YEAR AGO.

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.



IF YOU HAD TO USE ONE WORD TO DESCRIBE SOCIAL MEDIA/DIGITAL AD SPENDING HEALTH TODAY, WHAT WOULD YOU SAY?

This question was posed to the target audience.

OCTOBER 2023



IF YOU HAD TO USE ONE WORD TO DESCRIBE SOCIAL MEDIA/DIGITAL AD SPENDING HEALTH TODAY, WHAT WOULD YOU SAY?

This question was posed to the target audience.

JULY 2023



APRIL 2023



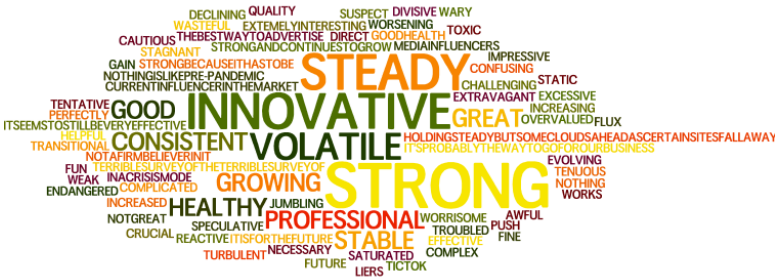
JANUARY 2023



OCTOBER 2022



JULY 2022



APRIL 2022



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IF YOU HAD TO USE ONE WORD TO DESCRIBE THE IMPACT OF THE CORONAVIRUS TO YOUR CLIENTS' AD SPENDING, WHAT WOULD IT BE?

This question was posed to the target audience.

January 2022

October 2021



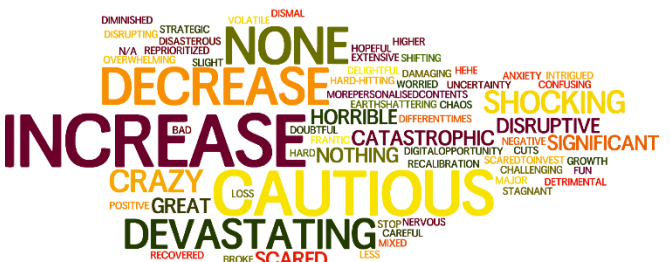
July 2021

April 2021



January 2021

October 2020



July 2020

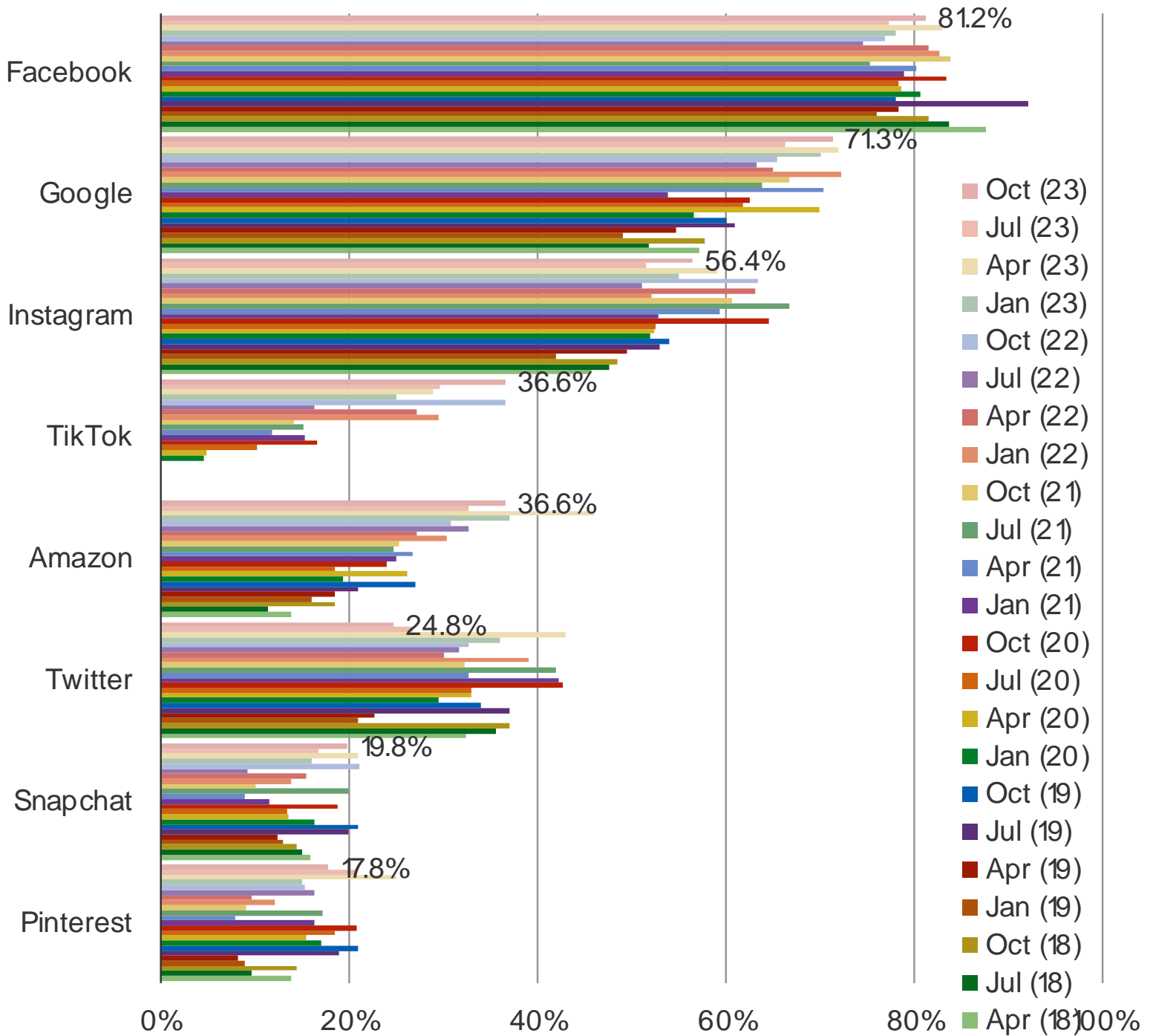
April 2020



MARKET SHARE

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

This question was posed to the target audience.



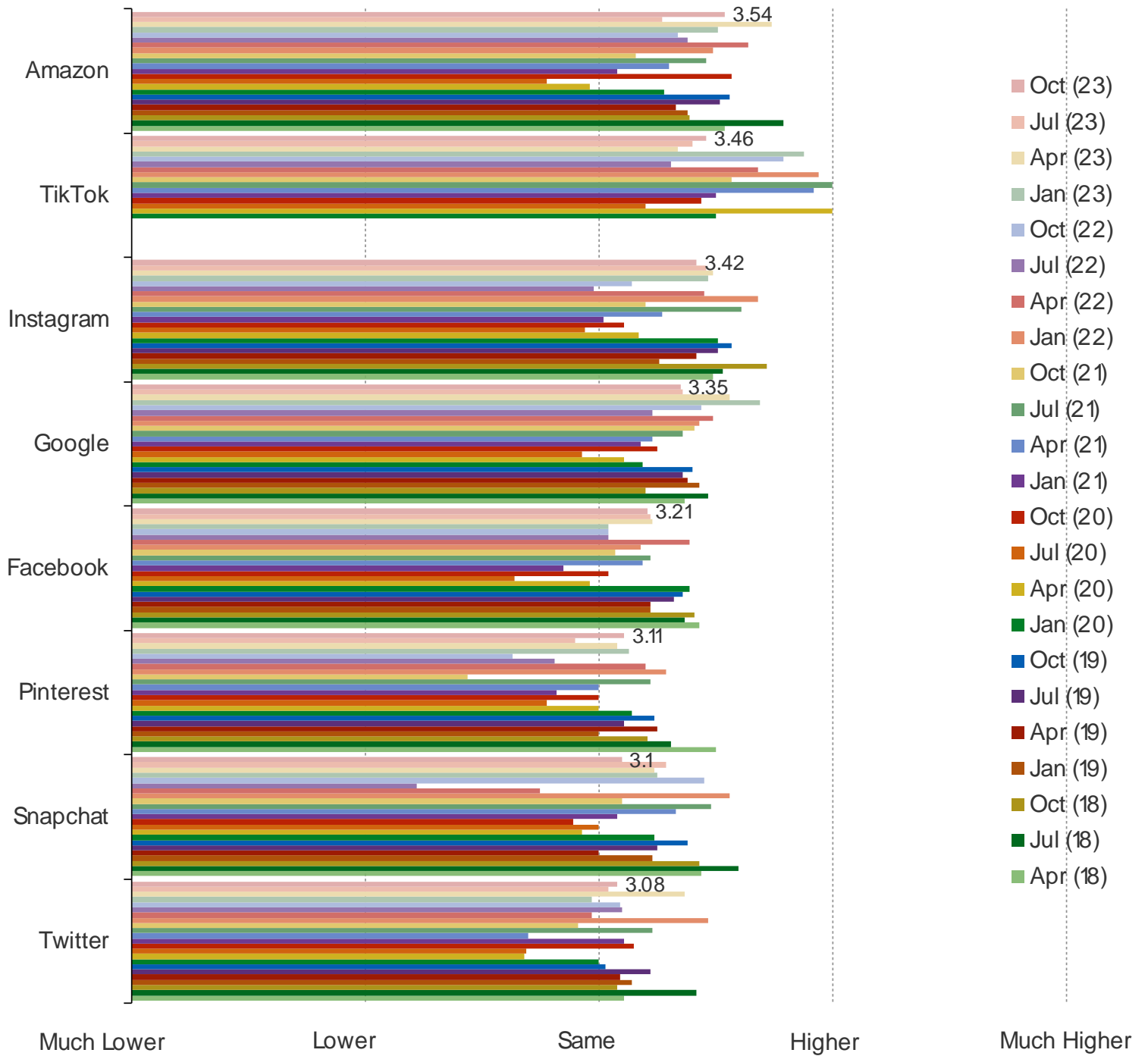
SPEND CHANGES

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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

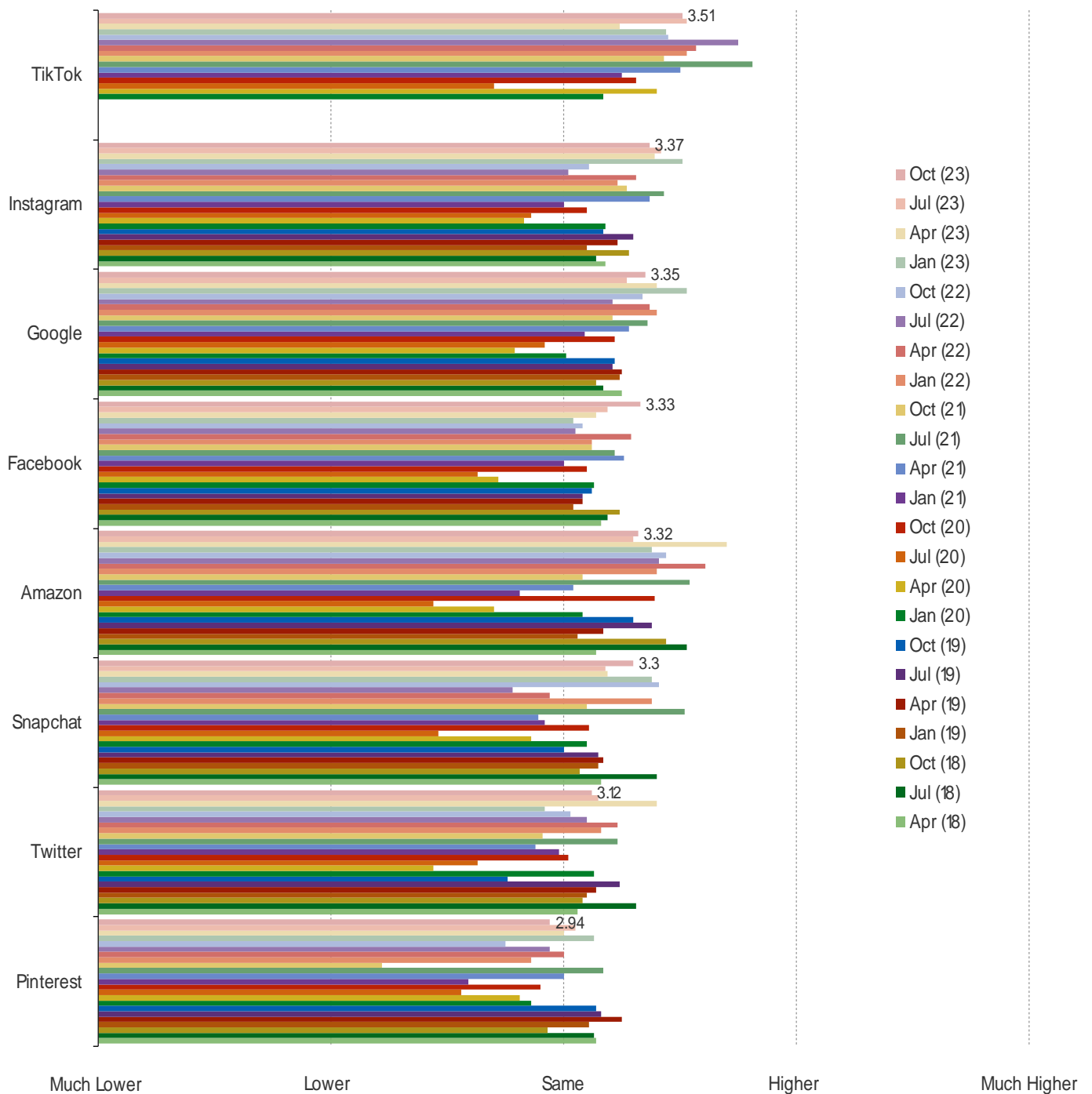


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Social Media Ad Excs

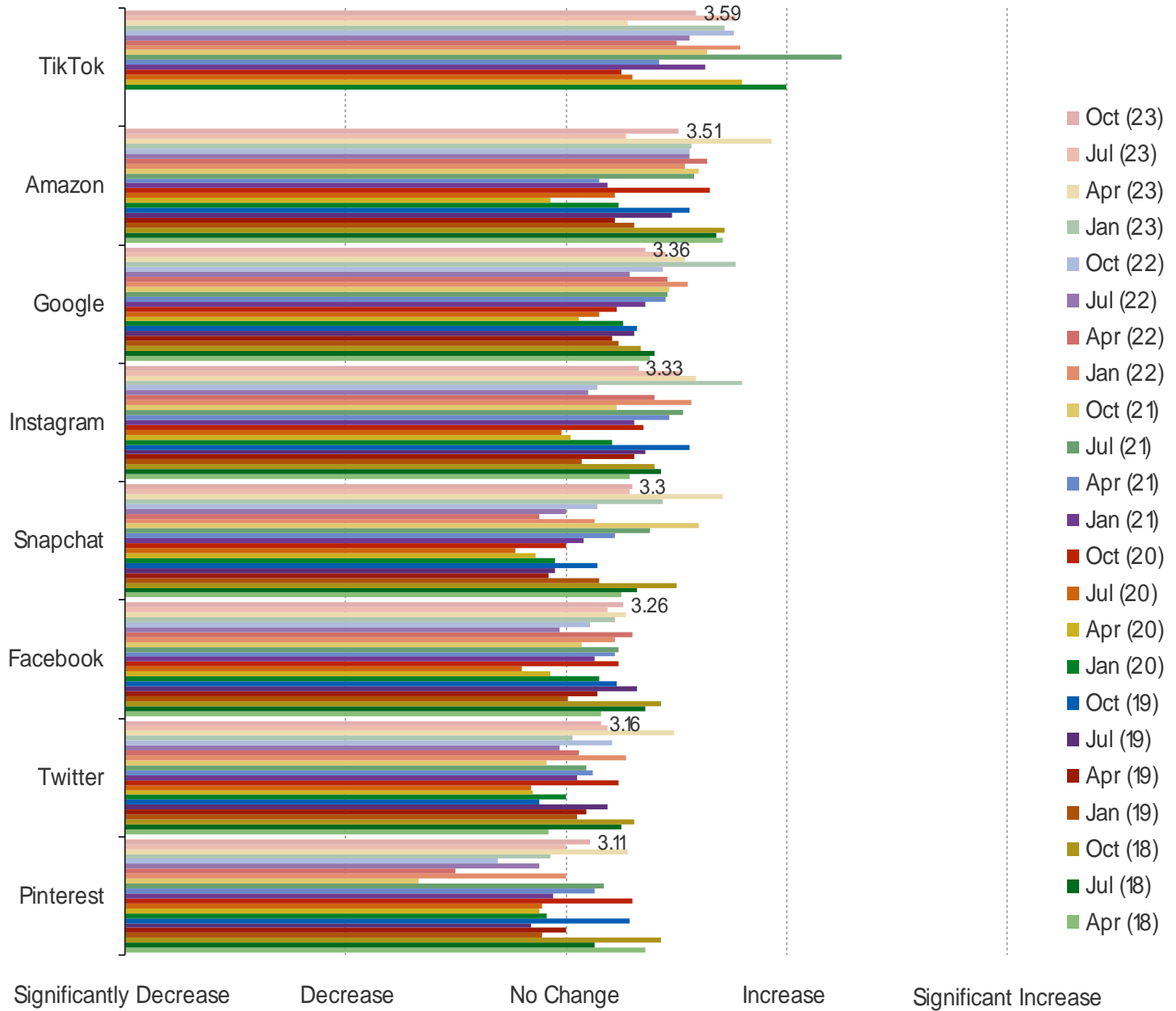
PLEASE COMPARE YOUR CLIENT'S AD SPENDING NOW VS. ONE QUARTER AGO.

*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



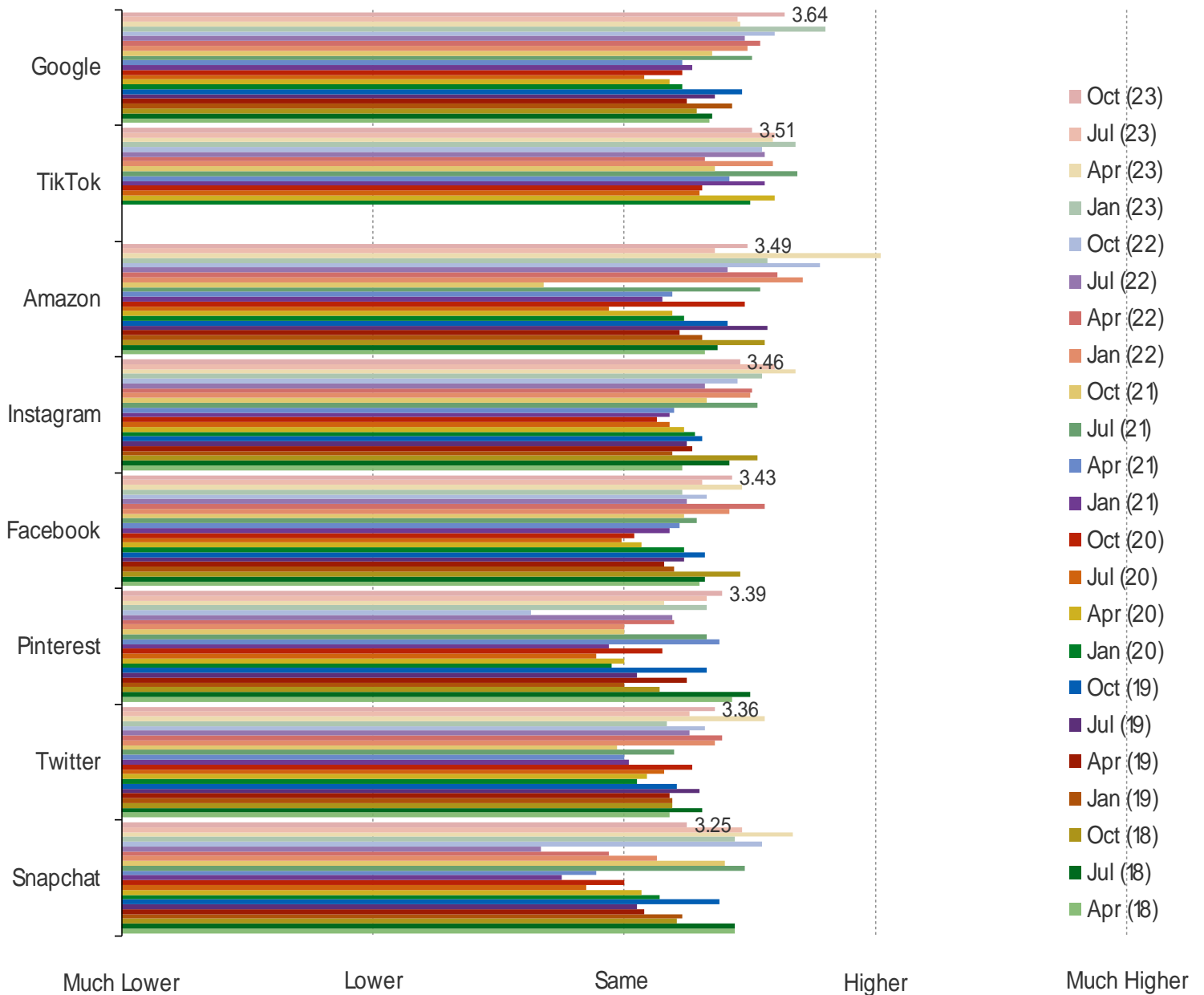
PRICING CHANGES

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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

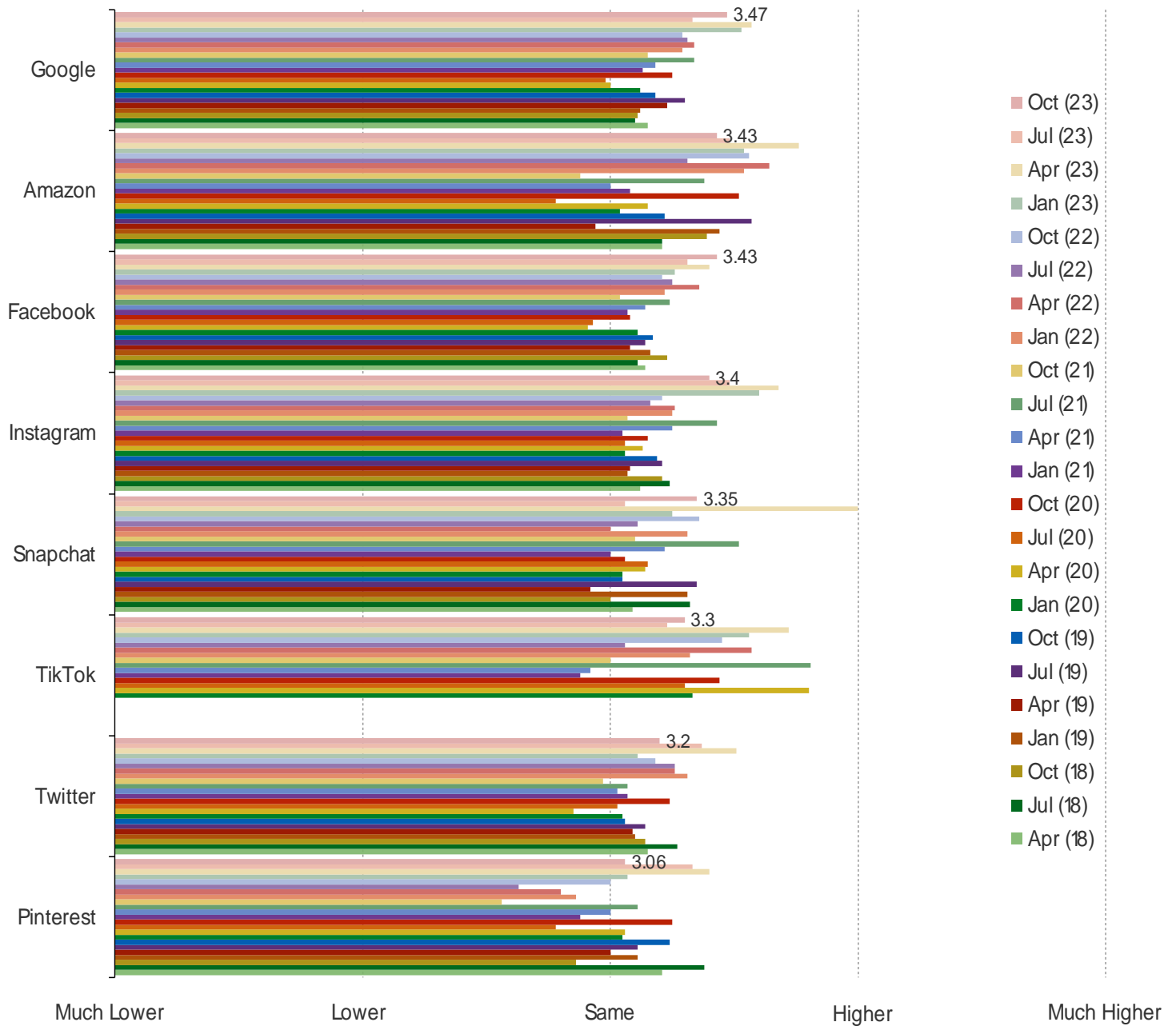


BESPOKE Surveys

Social Media Ad Excs

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

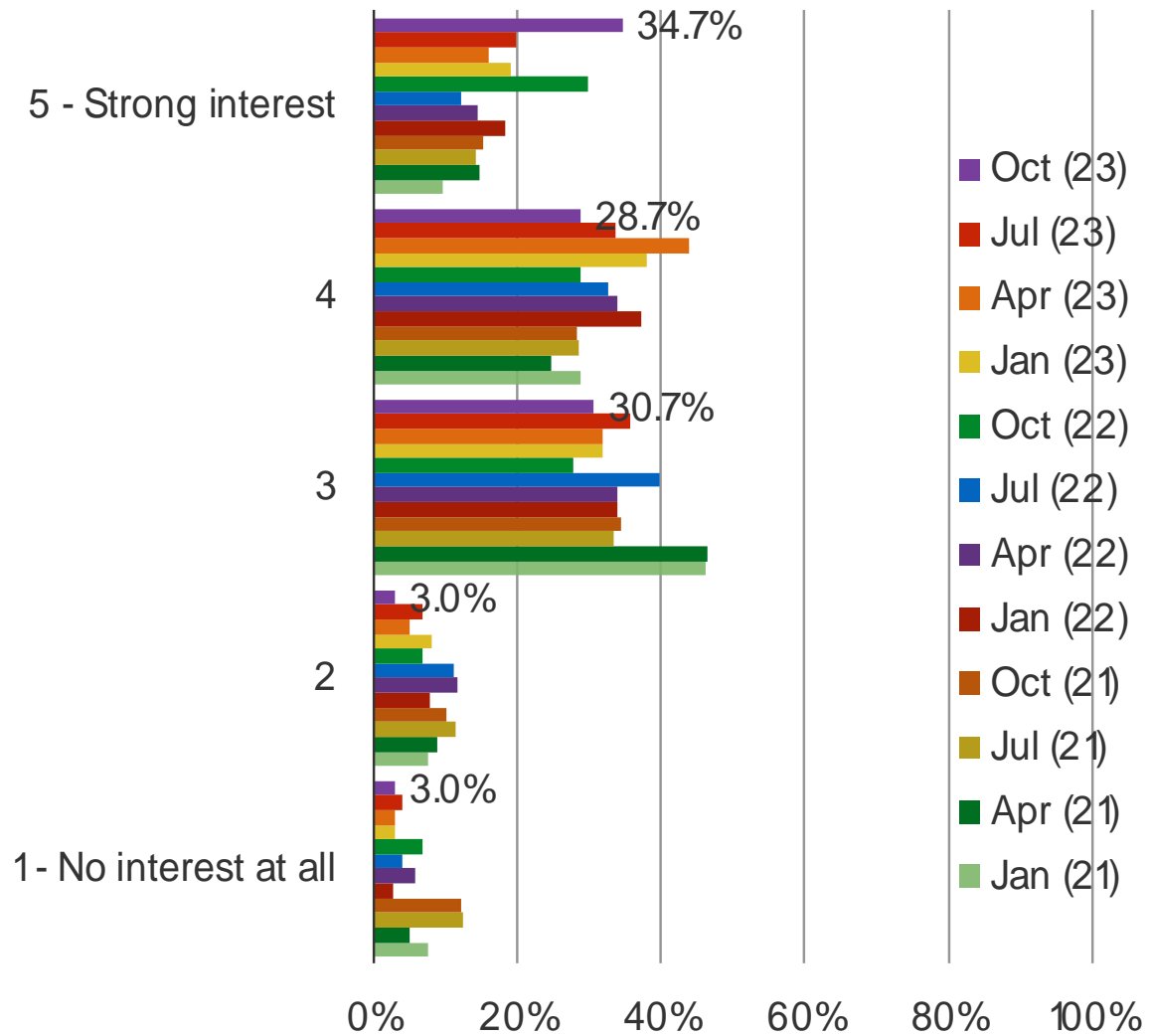
*Posed to ad execs whose clients have paid campaigns with each of the following platforms



SOCIAL COMMERCE

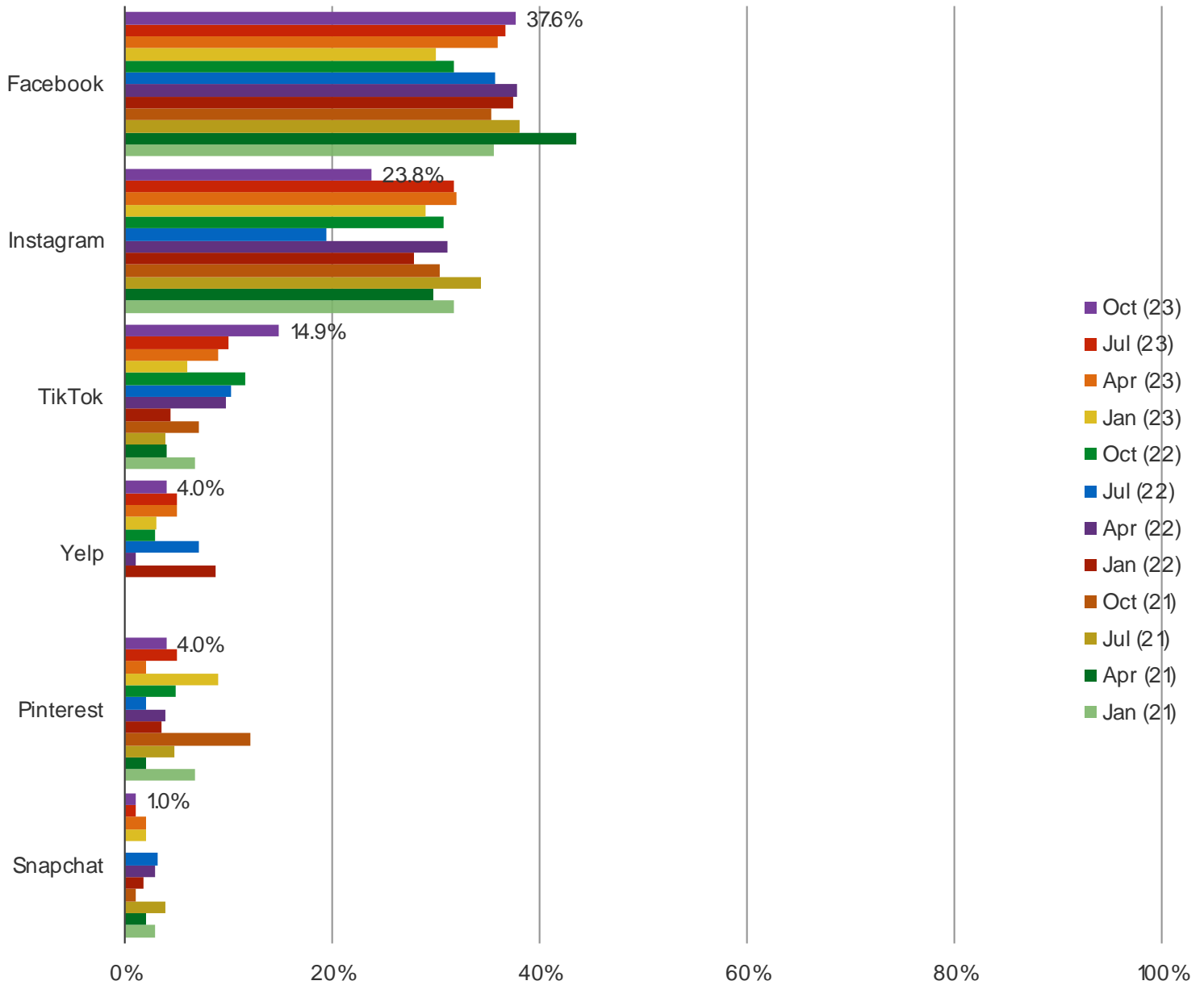
FROM YOUR EXPERIENCE WITH CLIENTS, HOW MUCH INTEREST IS THERE IN “SOCIAL COMMERCE” – IE, BEING ABLE TO ADVERTISE PRODUCTS ON SOCIAL MEDIA AND HAVE USERS PURCHASE WITHOUT HAVING TO LEAVE THE APP?

This question was posed to the target audience.



IF A CLIENT ASKED YOU WHICH PLATFORM WOULD BE BEST AS A SOCIAL COMMERCE SOLUTION, IN WHICH THEY COULD ADVERTISE AND SELL PRODUCTS DIRECTLY THROUGH A SOCIAL MEDIA PLATFORM, WHICH WOULD YOU RECOMMEND TO THEM MOST?

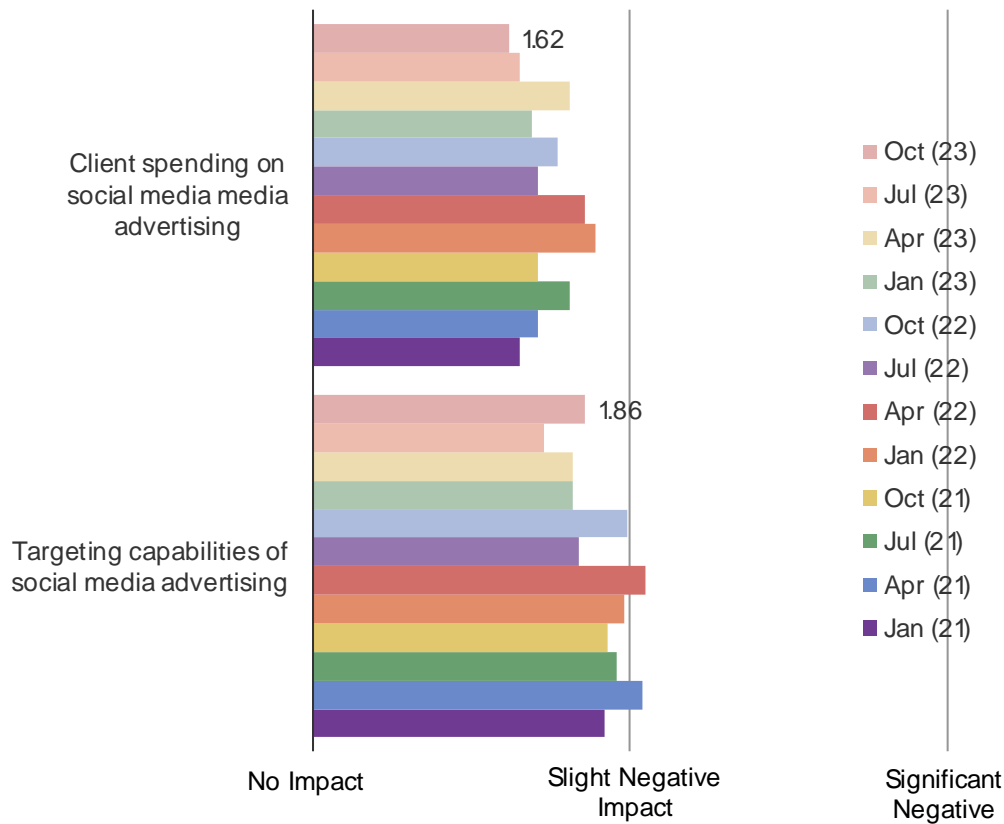
This question was posed to the target audience.



IOS 14 AND PRIVACY

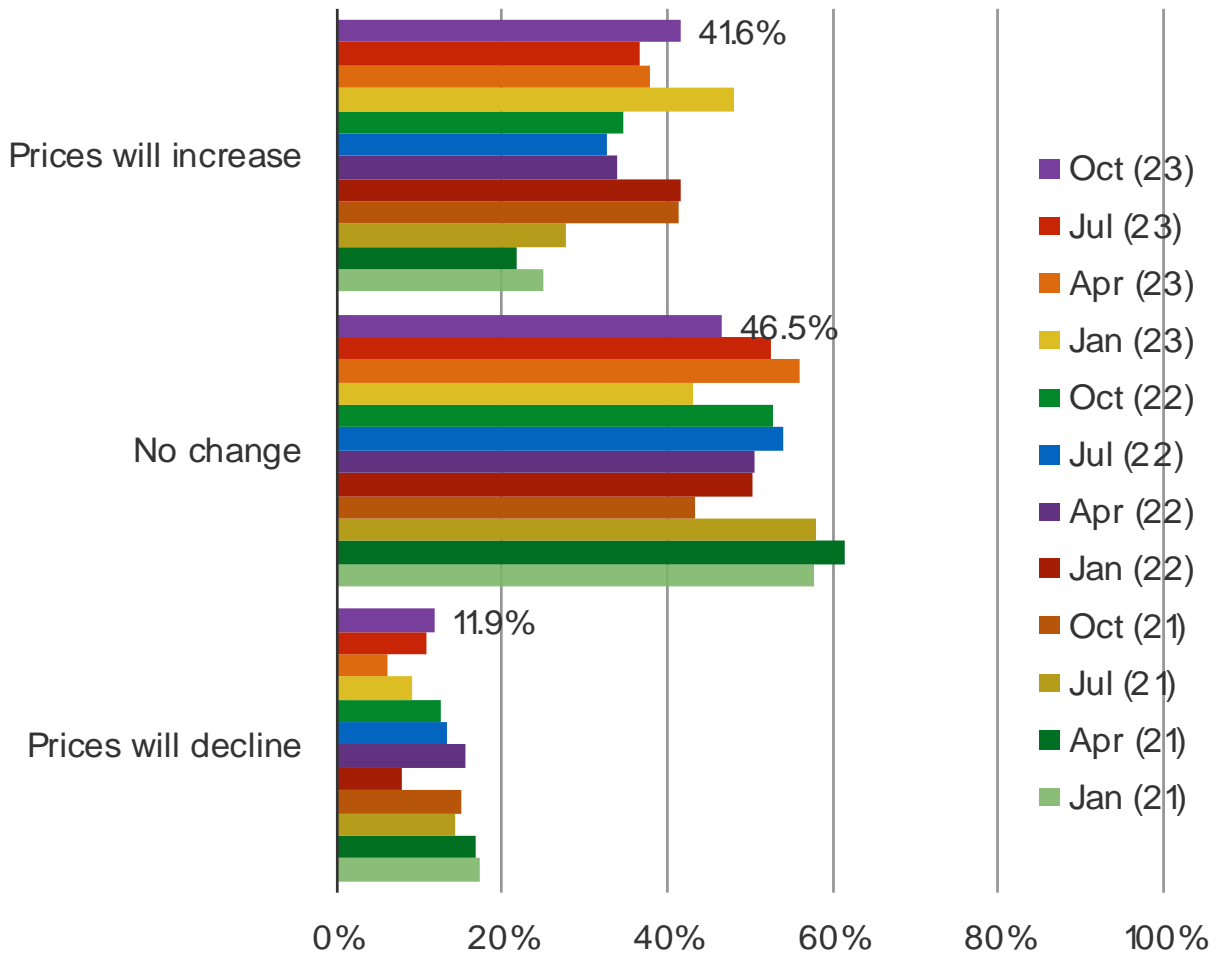
RECENT SOFTWARE UPDATES FOR THE IPHONE REQUIRES APPS TO ASK PERMISSION TO TRACK USERS ON OTHER WEBSITES/APPS. IF USERS DECLINE, THEY CANNOT TRACK THEIR ACTIVITY ON OTHER SITES/APPS. IN YOUR OPINION, WILL THIS HAVE ANY NEGATIVE IMPACTS ON THE FOLLOWING?

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?

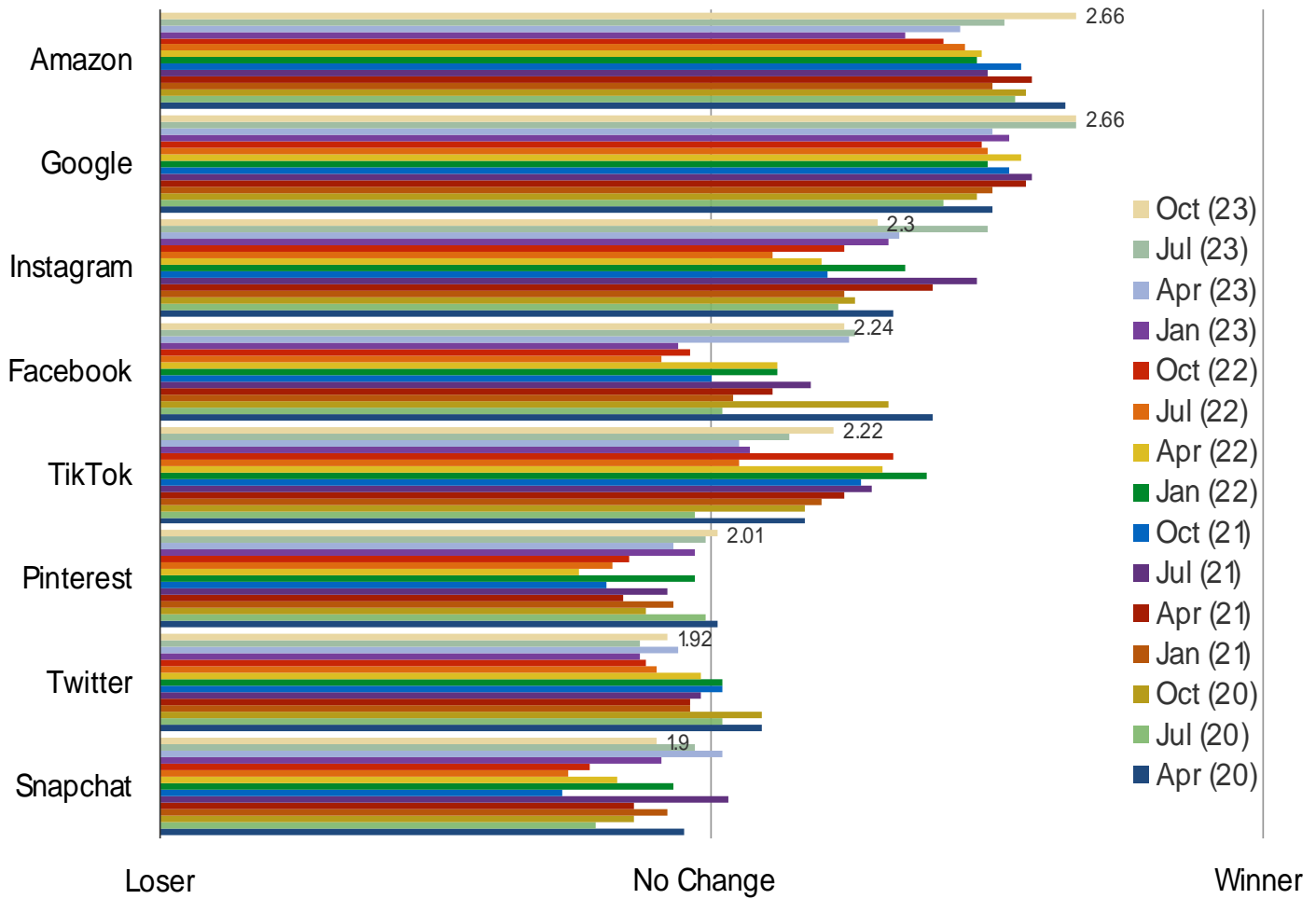
This question was posed to the target audience.



LOOKING FORWARD

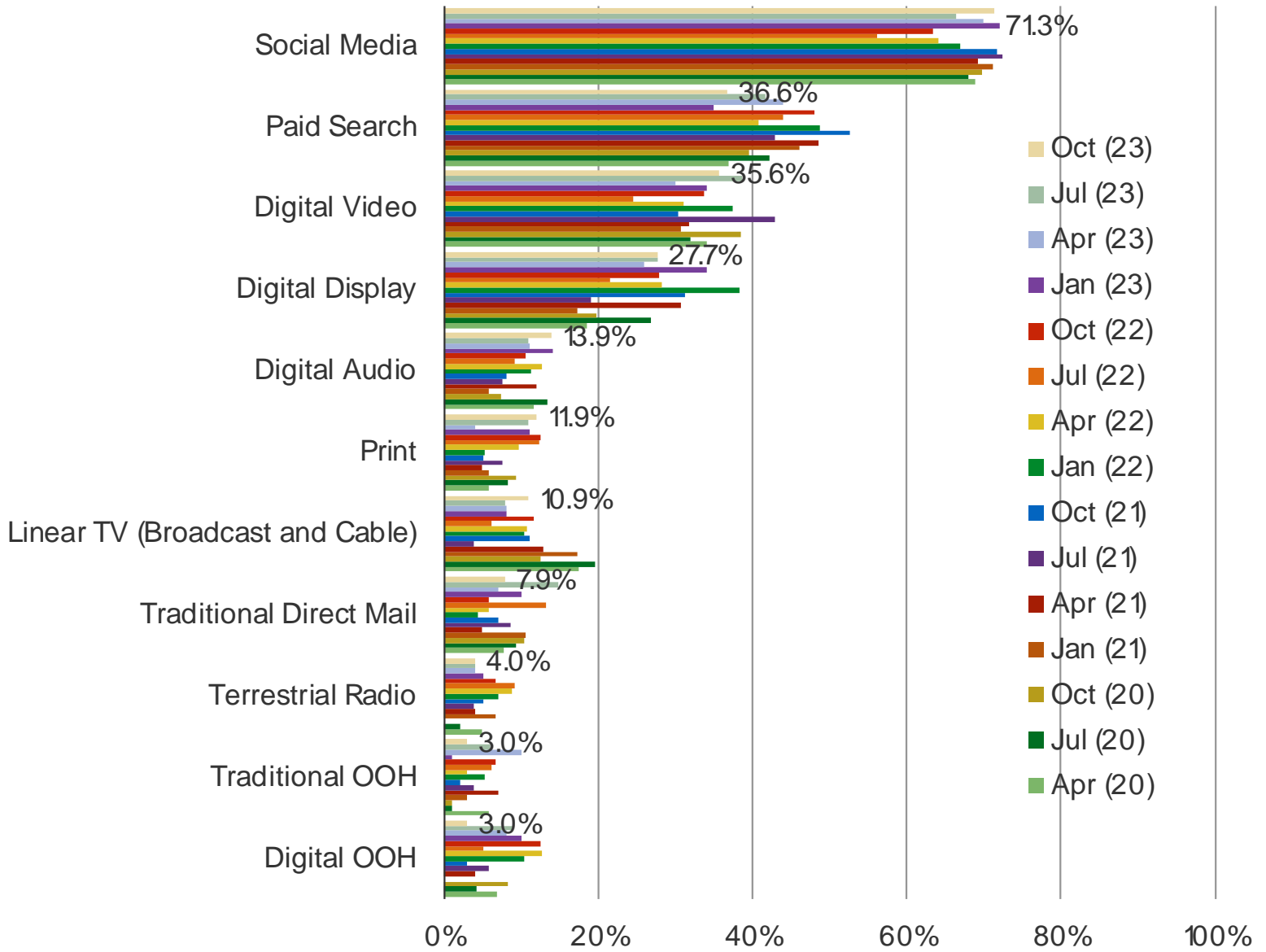
IN THE NEXT 3-6 MONTHS, DO YOU EXPECT THE FOLLOWING TO BE A MARKET SHARE WINNER OR LOSER?

This question was posed to the target audience.



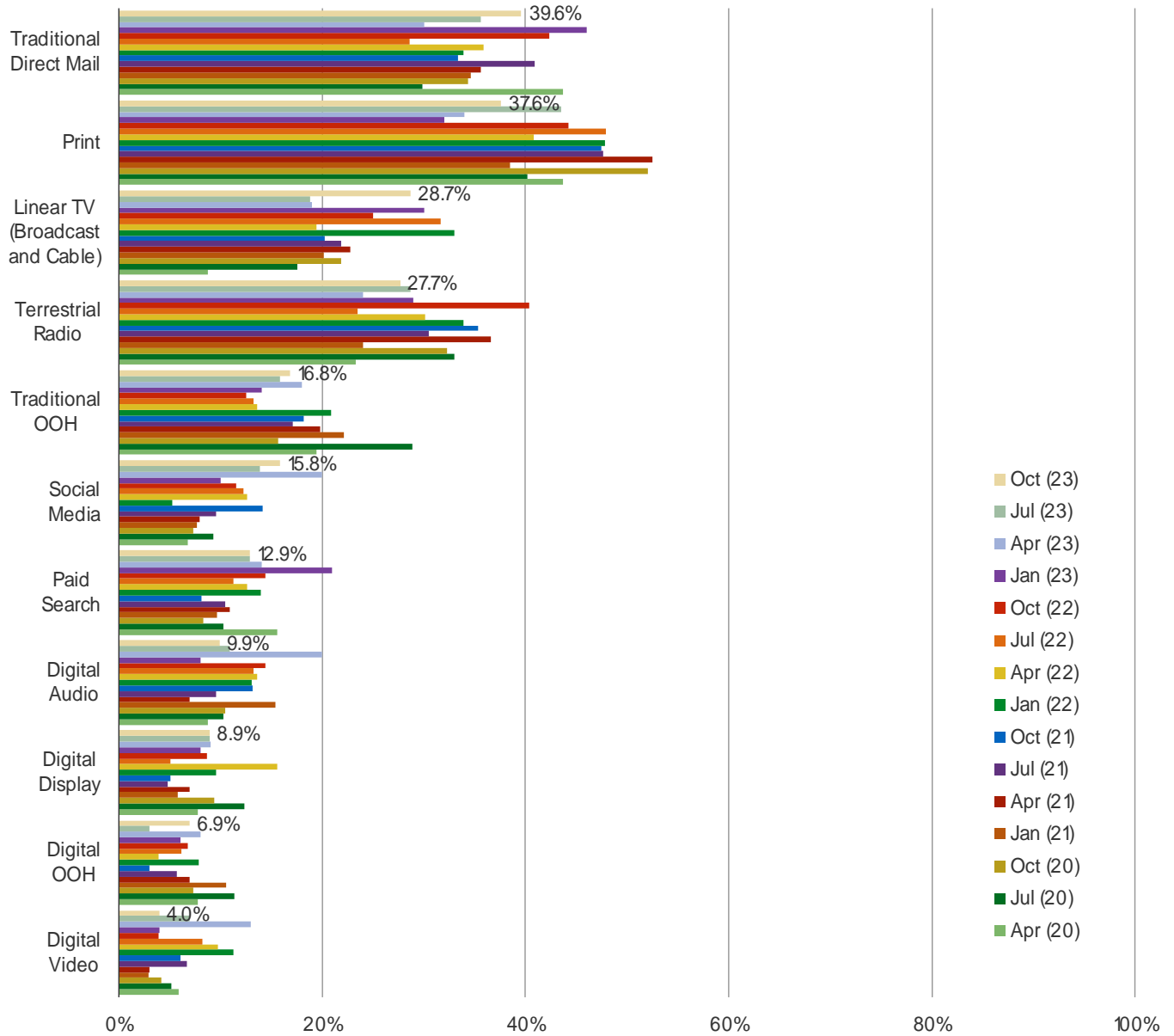
WHICH FORMS OF ADVERTISING DO YOU BELIEVE WILL FARE THE BEST OVER THE NEXT 3-6 MONTHS?
 (SELECT UP TO THREE CHOICES)

This question was posed to the target audience.



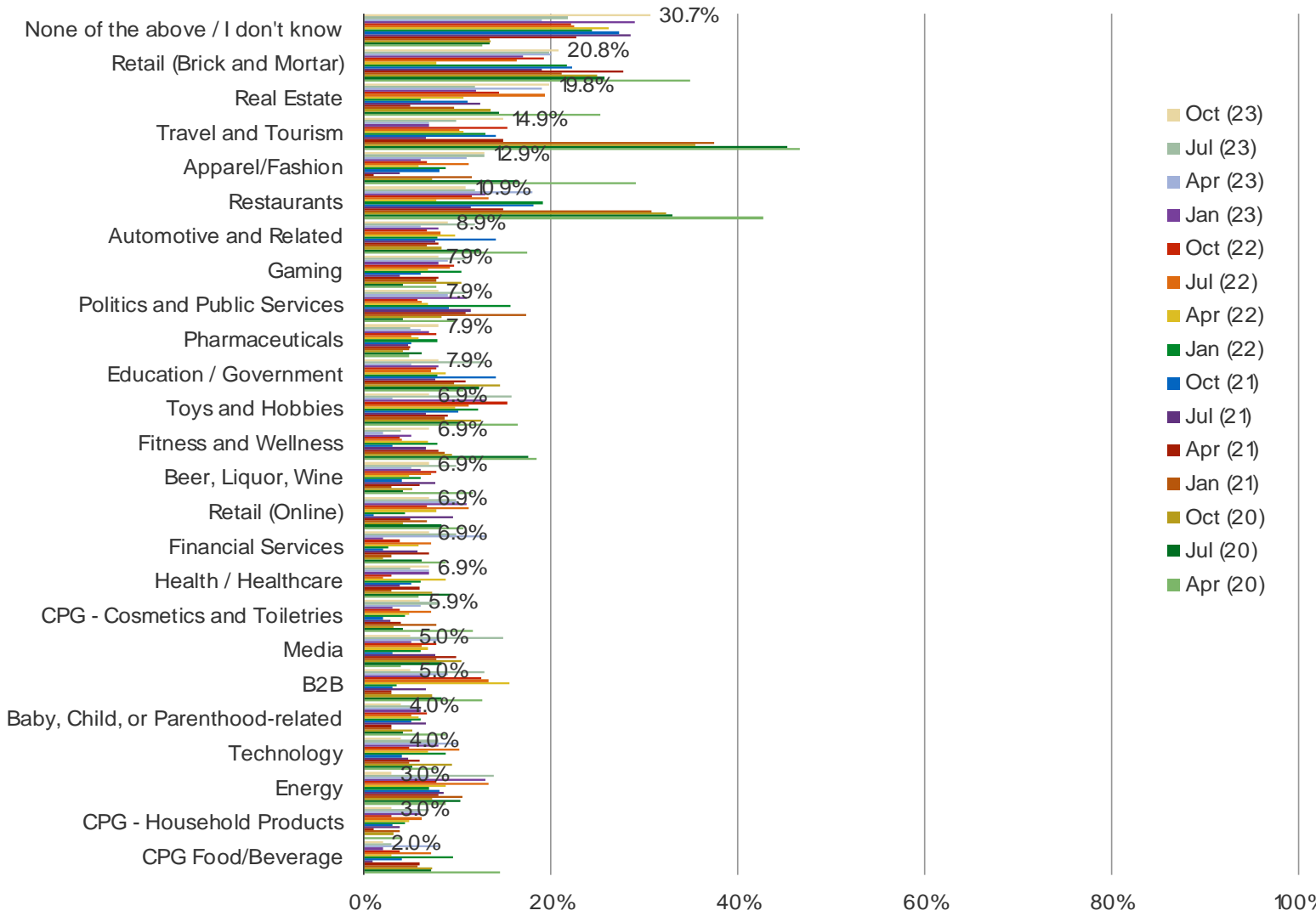
WHICH FORMS OF ADVERTISING DO YOU BELIEVE WILL FARE THE WORST OVER THE NEXT 3-6 MONTHS?
 (SELECT UP TO THREE CHOICES)

This question was posed to the target audience.



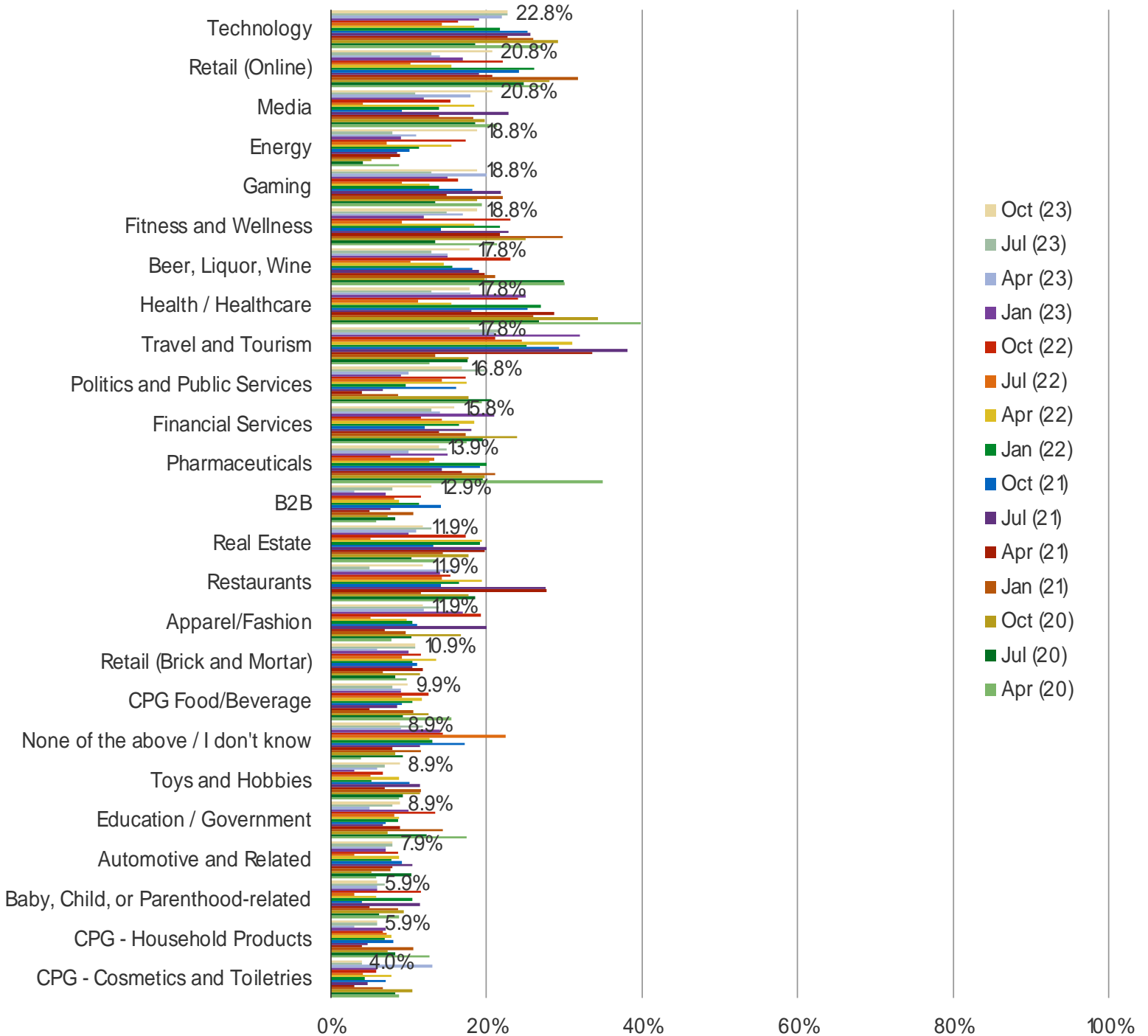
WHICH CLIENT TYPES HAVE BEEN/DO YOU EXPECT TO DECREASE AD SPENDING GOING FORWARD?

This question was posed to the target audience.



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

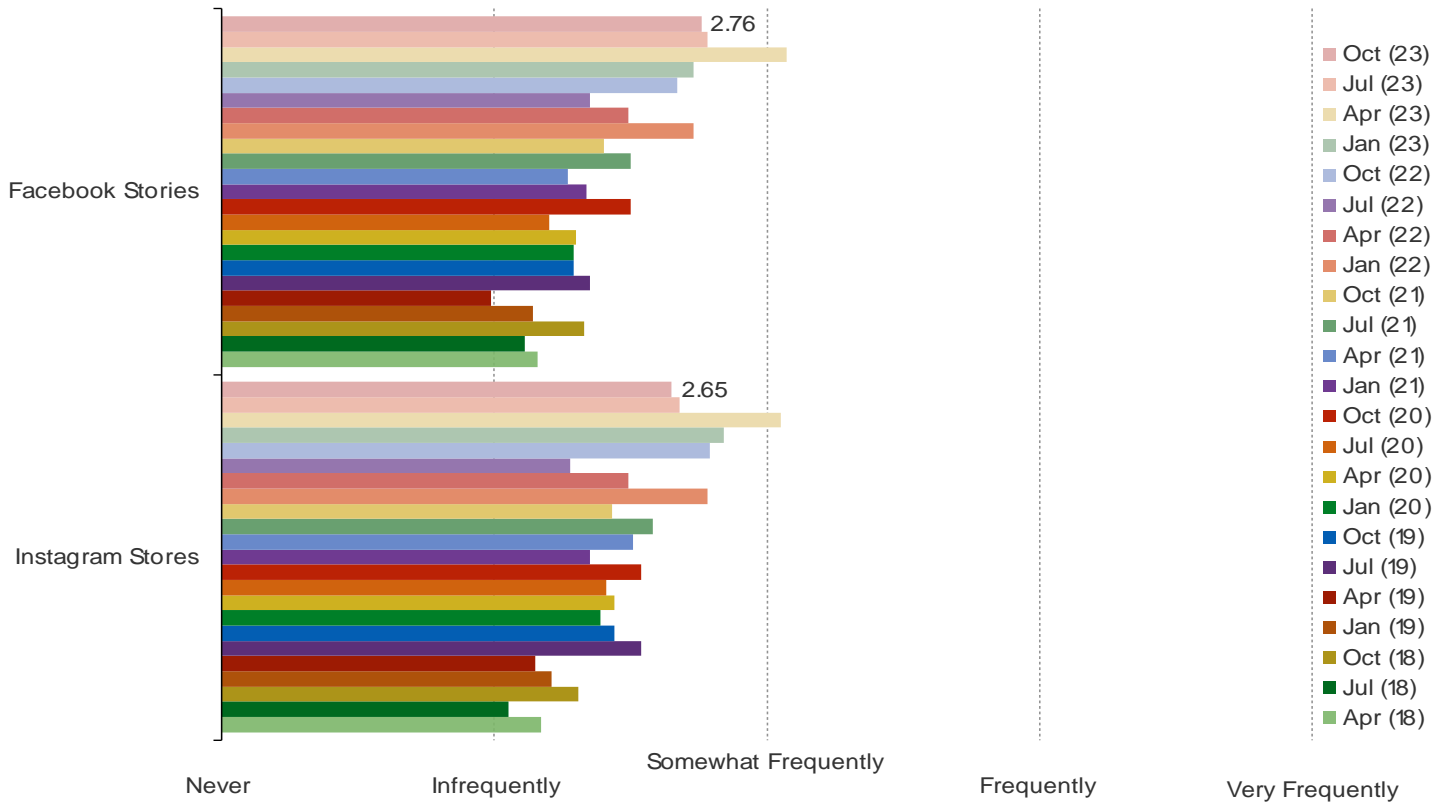
This question was posed to the target audience.



FB SPECIFIC INITIATIVES

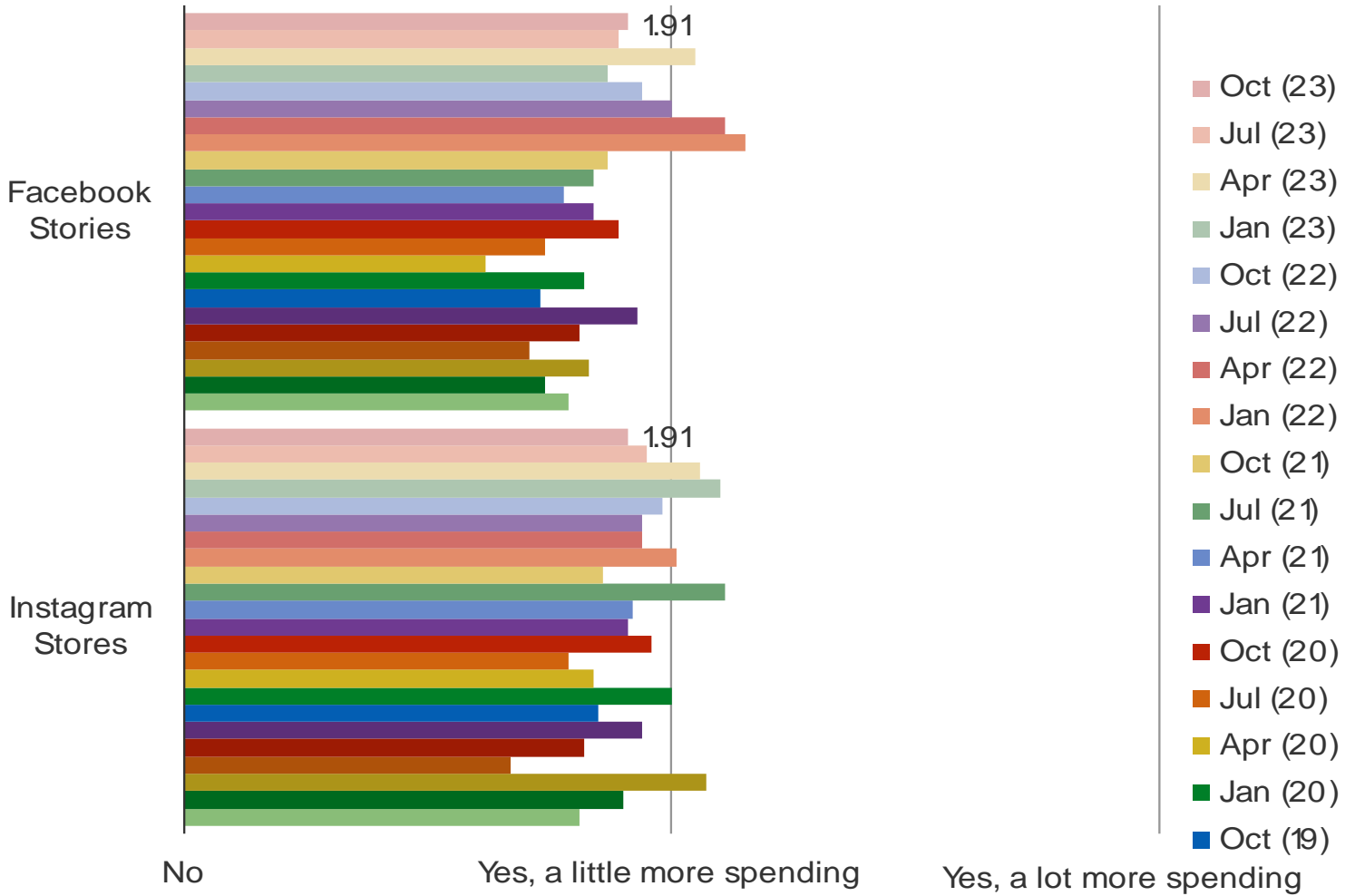
DO YOUR CLIENTS USE FACEBOOK OR INSTAGRAM STORIES TO ADVERTISE?

This question was posed to the target audience.



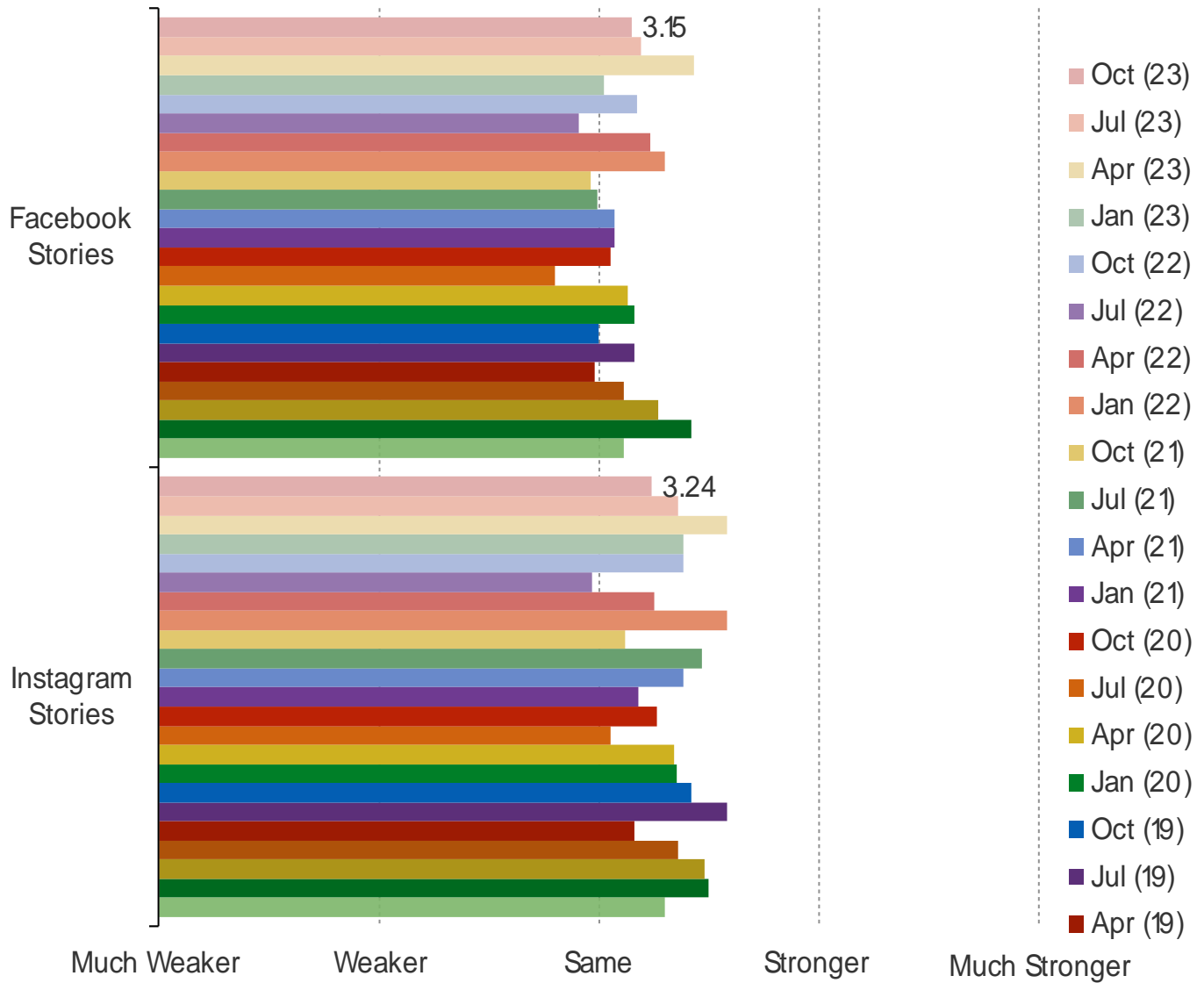
HAS CLIENT USAGE OF STORIES INCREASED AD SPENDING WITH THE PLATFORM IN GENERAL?

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



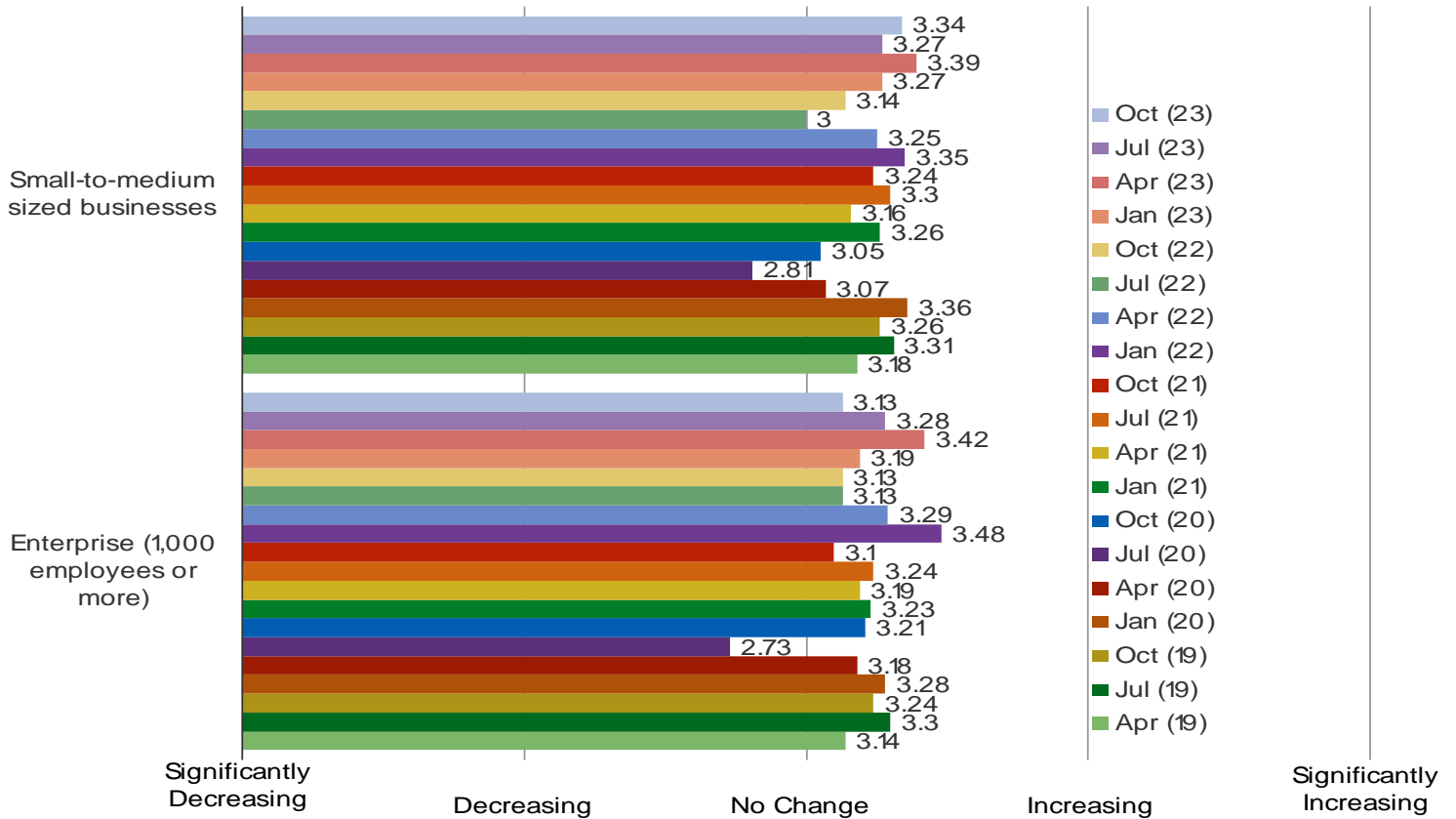
COMPARED TO A YEAR AGO, HOW HAS DEMAND FOR INSTAGRAM STORIES AND FACEBOOK STORIES CHANGED?

This question was posed to the target audience.



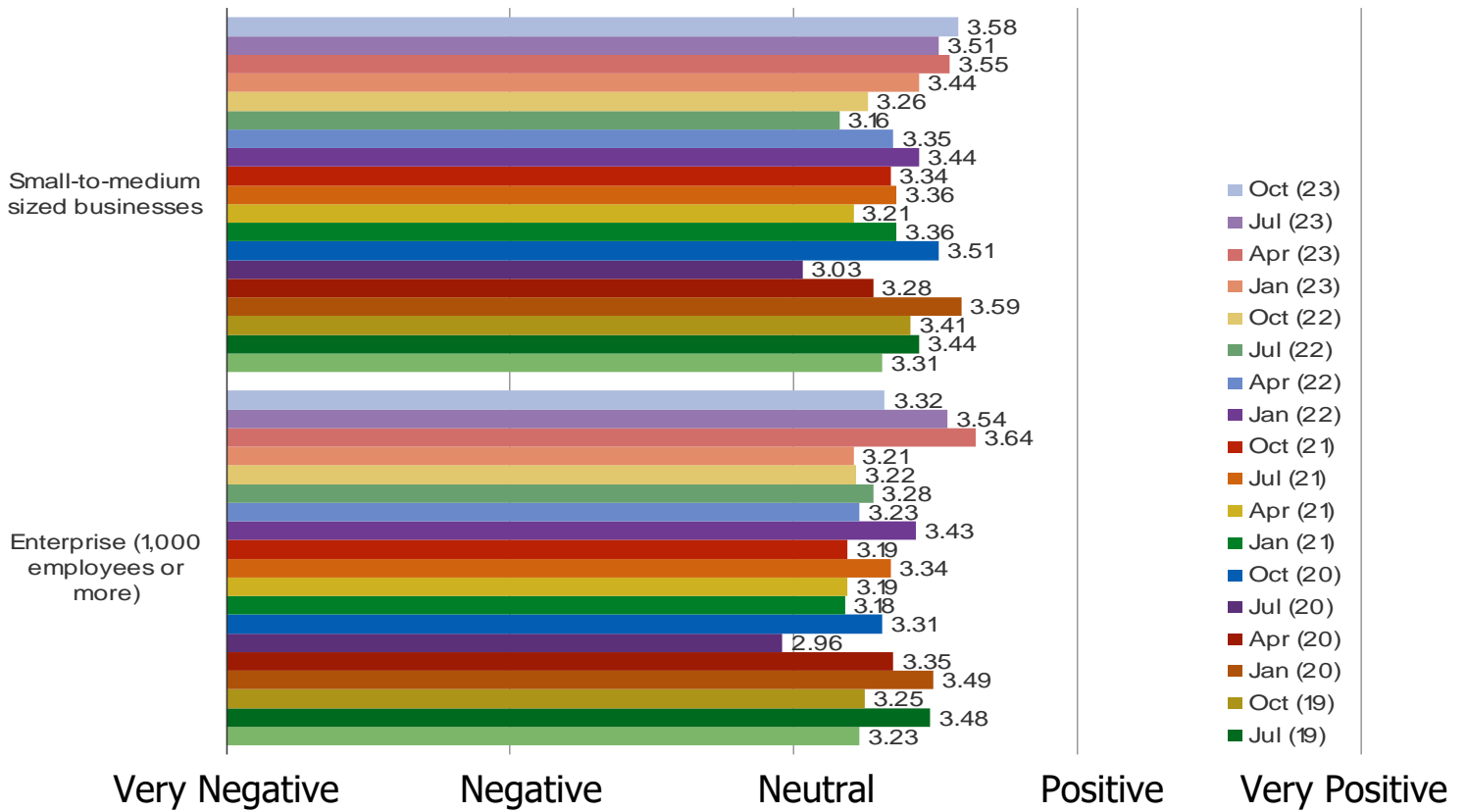
HAVE THE FOLLOWING CLIENT TYPES BEEN INCREASING OR DECREASING THEIR SPENDING ON FACEBOOK ADVERTISING?

This question was posed to the target audience.



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

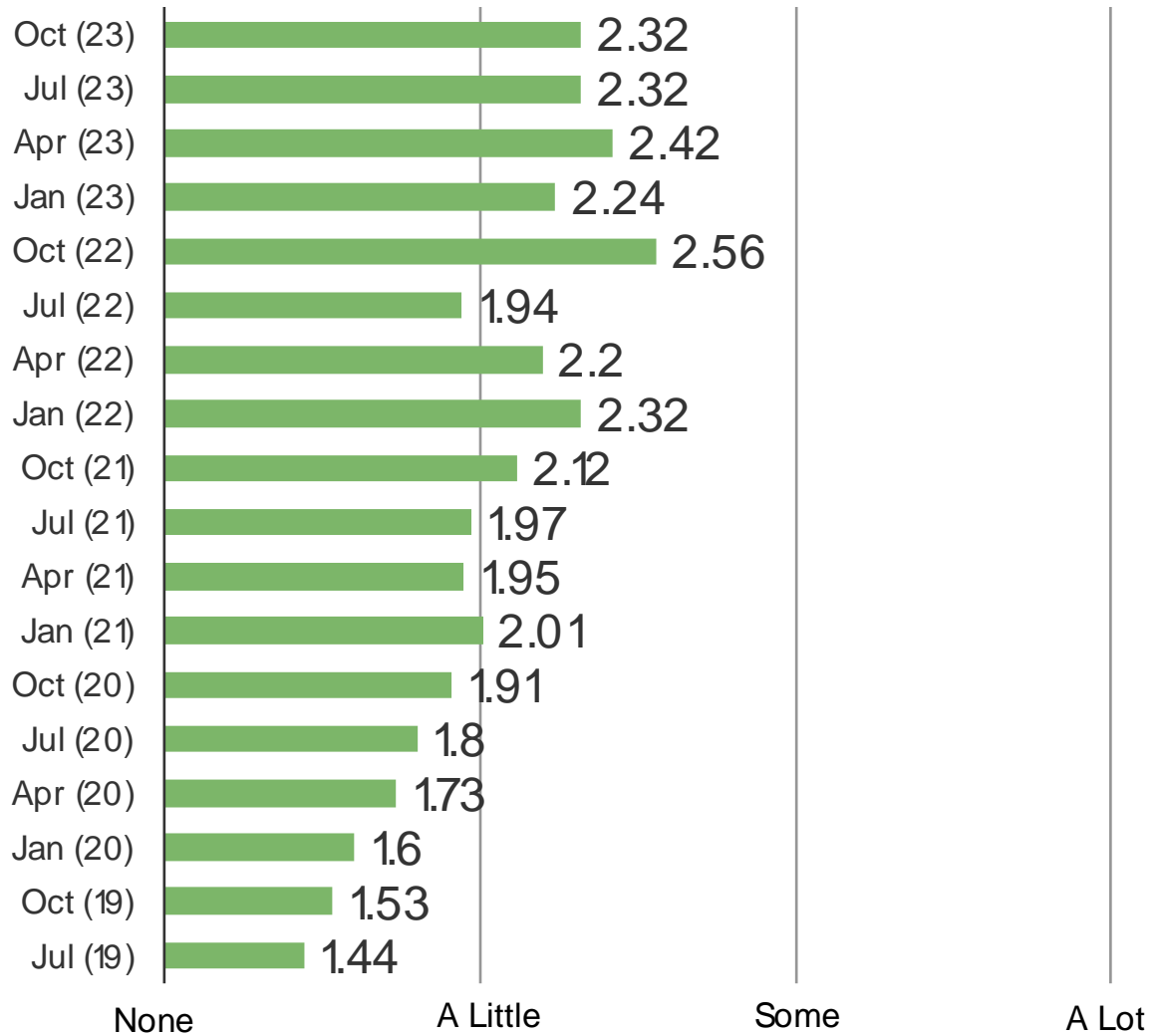
This question was posed to the target audience.



TIK TOK

DO YOUR CLIENTS HAVE ANY INTEREST IN TIK TOK?

This question was posed to the target audience.



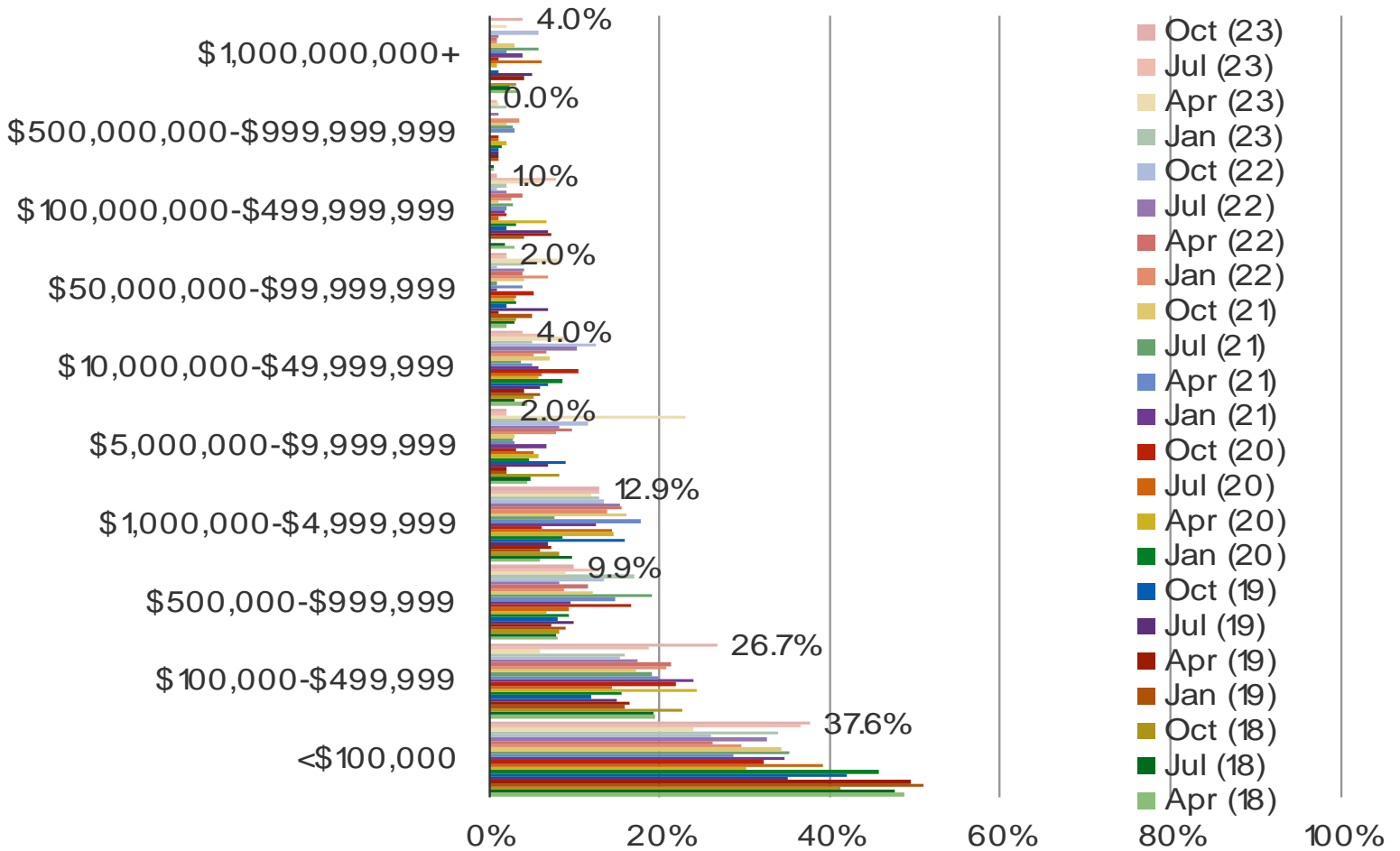
BACKGROUND INFO

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Social Media Ad Execs

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

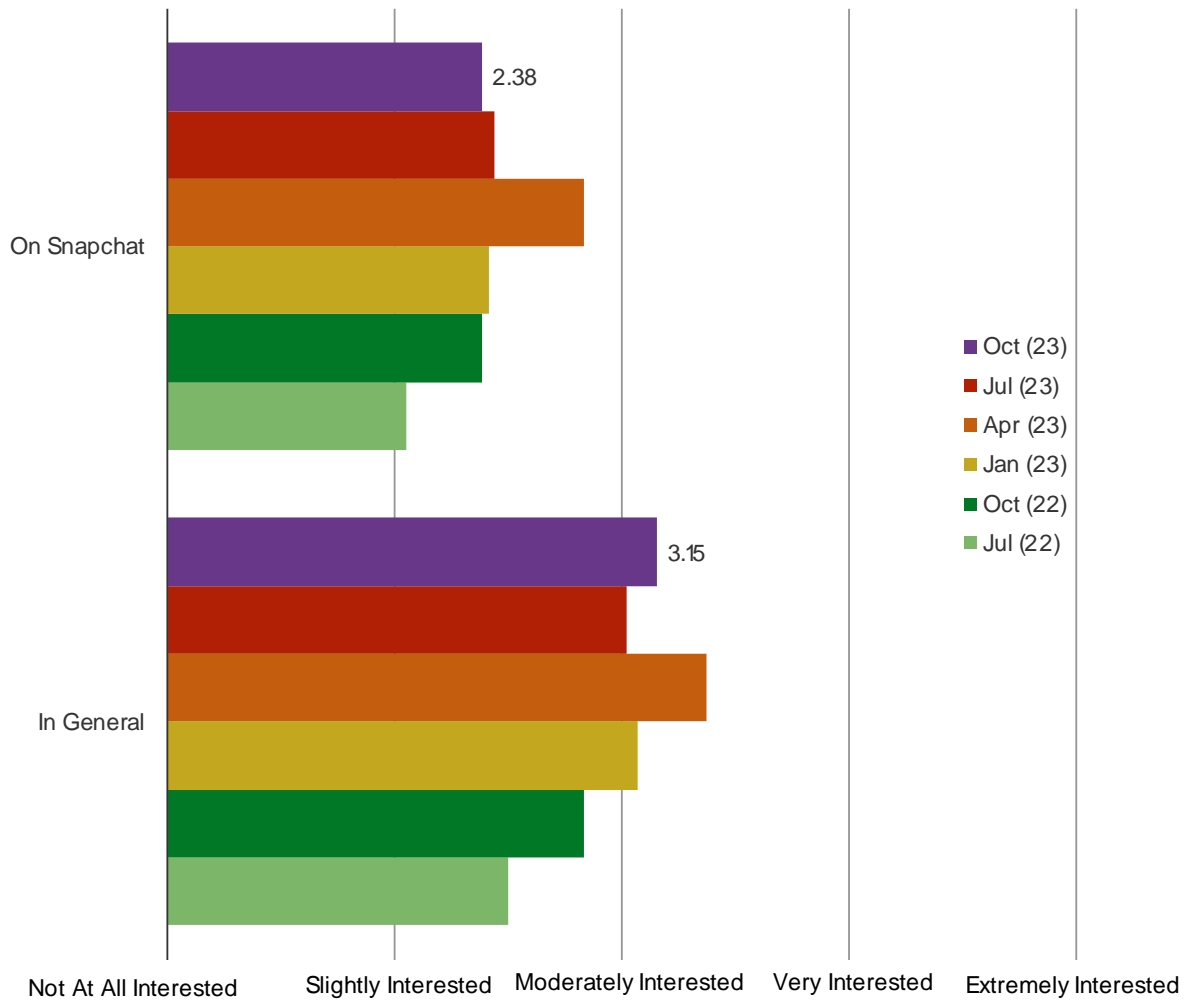
This question was posed to the target audience.



RECENTLY ADDED QUESTIONS

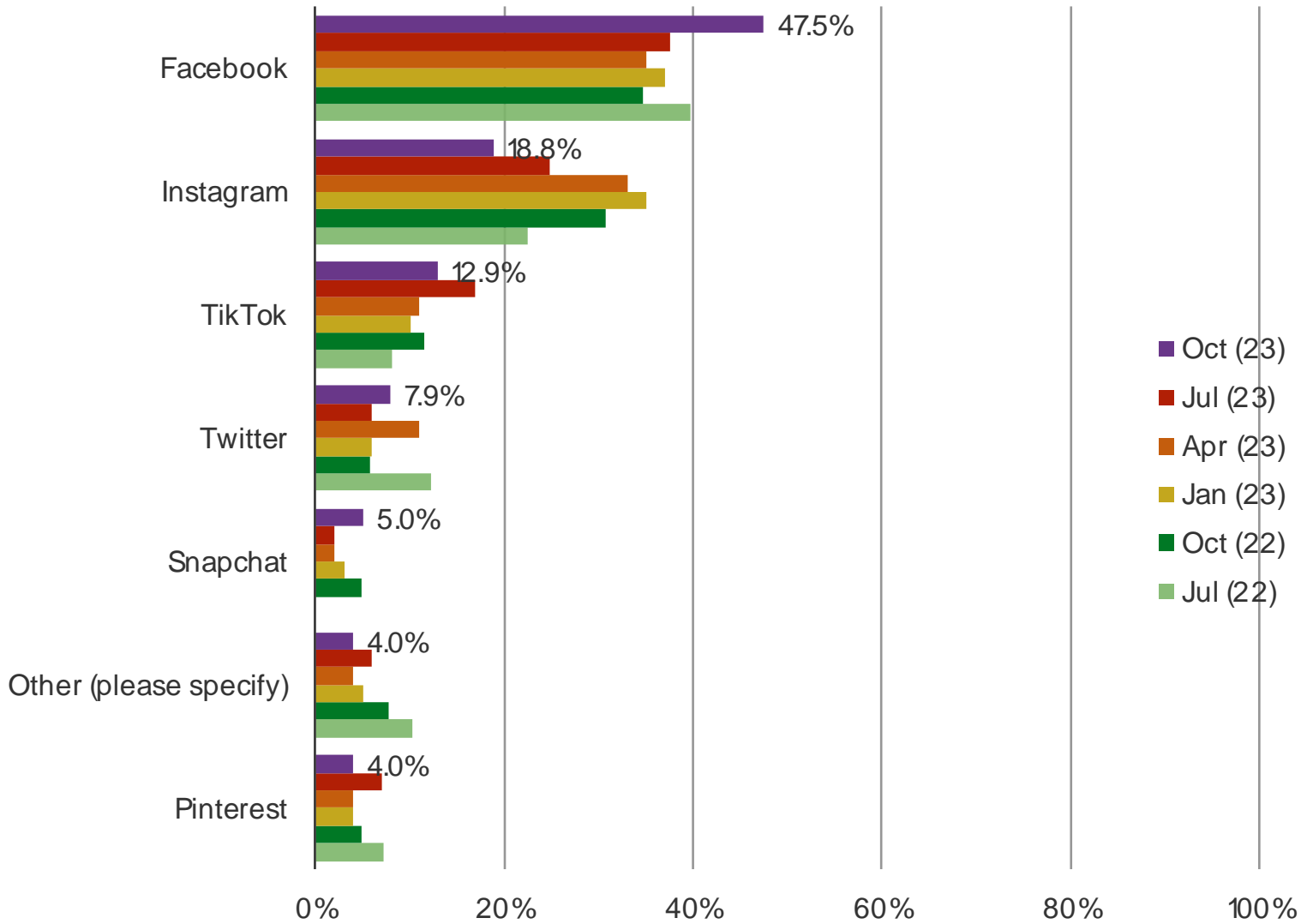
WHAT IS YOUR LEVEL OF INTEREST IN ADVERTISING FOR CLOTHES, SHOES, COSMETICS, AND OTHER ACCESSORIES THROUGH AUGMENTED REALITY?

*Posed to ad execs



IN YOUR OPINION, WHICH PLATFORMS FIRST-PARTY SOLUTION TO IDFA IS MOST EFFECTIVE?

*Posed to ad execs



IN YOUR VIEW, WHAT IS THE BIGGEST HOLDBACK TO ADOPTION OF AR (AUGMENTED REALITY) ADVERTISEMENTS?

*Posed to ad execs

