

PRESENTS: MARKETING MATTERS, VOLUME III

# THE TOP 2021 ADVERTISING TRENDS





# INTRODUCTION



Predicting the future, regardless if you were the legendary Oracle of Delphi or a 20-year agency executive, can be fraught with error. Looking back at last year's 2020 prediction trends—nobody could have foresaw the impact of the COVID-19 virus to the world's economy. Many believe the pandemic's negative influence on advertising will largely prevail until the fourth quarter of 2020.

Magna Global, IPG Mediabrand's strategy arm released its latest forecast regarding the advertising industry published by AdWeek. According the forecast, the American advertising market will only **decrease by 4%**—chiefly because advertisers will spend **\$5 billion** on **political ads**, mitigating the decline in linear marketing sales.<sup>1</sup> While this observation skews the numbers, the reality is, COVID-19 has negatively impacted both traditional and digital ad spend.

Now, more than ever, business owners face unprecedented challenges. The pandemic and its aftermath are going to continue to cause major disruptions for businesses across the country while changing consumer buying behavior. Most local businesses which have traditionally been dependent on **foot traffic**, **word-of-mouth** and **social media marketing** to promote their small business. Because of the shelter-in-place orders, many of these businesses have seen a major drop in foot traffic and word-of-mouth recommendations.

Businesses today have or are going through three stages of response to these unprecedented market conditions. Those stages include **stabilizing** your company, **reopening** your workplace and finally, **growing** your business as they prepare for the "New Normal."



#### INTRODUCTION



# A TALE OF TWO CITIES

Since COVID-19, we have seen companies splinter into two distinct groups; the haves and have nots. Either your business is overwhelmed with orders or you're struggling to keep the lights on. Initially non-essentially deemed businesses were force to close their doors to help slow the spread of COVID-19 and protect their employees and customers. With the prolonged quarantine, many of these businesses were forced to either shudder their doors permanently or were forced to pivot overnight to a digital-only or delivery reality. Of those businesses severely hit the hardest were retailers and restaurants.

According to Yelp, **55%** of businesses have shut down for good due to COVID-19. As of July 10, **132,580 businesses** listed on their platform remain closed. Of all business closures **72,842 small businesses** will never reopen again. "When you look at those two top categories [retail and restaurants], we're potentially never going to see some of these businesses again," said Justin Norman, Vice President of Data Science at Yelp.<sup>2</sup>

Restaurants were forced to offer **take-out** or **home delivery services** to survive.

Companies that were the fastest and most flexible in adapting to the new reality, will have a huge advantage in capturing marketshare. Today's business owners should be looking to build a **digital marketing strategy** that takes advantage of the top advertising trends in 2021, in order to prepare for when consumers start spending to pre-Covid levels.

It's important that businesses, regardless of their size or industry, remind their customers that they are open for business and share with them how they are putting safety measures in place to ensure how their customer and employees are following local, state and federal health guidelines. Small businesses owners should reconsider their previous marketing efforts of relying on social media and word-of-mouth. Now more than ever, business owners should make sure their online search rankings are high and leverage a multi-channel marketing approach to promote brand **awareness** and **daily** or **weekly** offerings by using a combination of paid search, SEO and highly targeted programmatic advertising. WUNDERWORX has formulated an easy-use turnkey solution to address your needs.



Steve Nolan
CEO & Co-Founder, **WUNDERWORX**, Inc.



#### **CONSUMER TRENDS**

Due to the COVID-19 lockdown of the country with shelter-in-place orders, online **eCommerce** has seen **tremendous growth**. A study conducted entitled "Why We Buy," researched 2,000+ U.S. and U.K. consumers as to what makes them keep coming back to brands—and what makes them look for a new company.<sup>3</sup> Criteo found some surprising data points that today's marketers should take to heart. First, **brand** 

loyalty may be up for grabs. Nearly 3 out 4 consumers surveyed said they are willing to consider a new brand. Today's consumers are demonstrating with

"Each business is a victim of digital Darwinism, the evolution of consumer behavior when society and technology evolve faster than the ability to exploit it. Digital Darwinism does not discriminate. Every business is threatened."

— Brian Solis, Global Evangelist, Salesforce

their wallets that they are more open to take a chance on new companies they've heard positive things about.

## **CUSTOMER JOURNEYS**

Gone are the days where a consumer sees an ad, goes to the store and buys the product. With the adoption of **re-targeting**, **cross-device targeting**, **social media**, **geospatial mobile data**, **OTT** and **OOH** outlets makes the term "linear click path" obsolete. Today, the journey starts with a piqued interest, followed by research, watching product videos, reviews and ratings. The user then often dives deeper, comparing features and price—then progresses to an online or in-store purchase.<sup>4</sup>

## **BRANDING**

Marketers know that brand values play an integral role influencing certain target audiences, like Millennials. 51% of shoppers stated that their purchasing decisions were affected by a brand's values. And not surprising, 1 in 6 shoppers stopped purchasing from a brand because its values weren't aligned with their personal beliefs. With the resurgence of Black Lives Matters and the resulting Cancel Culture movement

has caused many brands to take stock of their brands such as Uncle Ben's Rice, Aunt Jemima, and the Washington Redskins to name a few. The good news for marketers is more

than **30% of consumers** said they are more likely to return to brands that realign with their personal values.

#### **PAID SEARCH**

Paid search remains the dominant digital ad channel and we don't foresee that changing in 2021. Google retains the upper hand through their constant innovation and sophisticated tools that enables experienced marketers the ability to to target their prospective customers for effectively. With so many consumers forced to work from home, shopping has gone digital, driving eCommerce sales to an **all time high**.

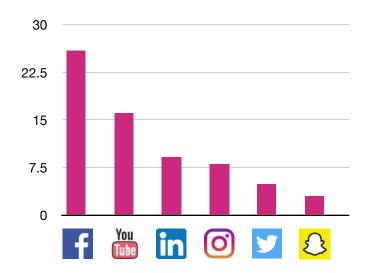




#### **SOCIAL MEDIA**

Social Media is having a significant effect on marketers' attitudes regarding advertising budgets with **7 in 10 advertisers** currently leveraging influencers in their digital video advertising.<sup>5</sup> Paid **influencer marketing** seems to be declining as the rise of **micro-influencers** begins to take-off. Micro-influencers are often deemed more authentic and have a stronger connection with their audience and potentially your brand

A common way for brand to attract local audiences, is by **geo-tagging** their posts and stories. Social platforms such as Instagram will be emphasizing **geo-location search**. Instagram and Facebook users can add locations to their content, which will show up in search results, helping consumers find your brand and **content locally**.6



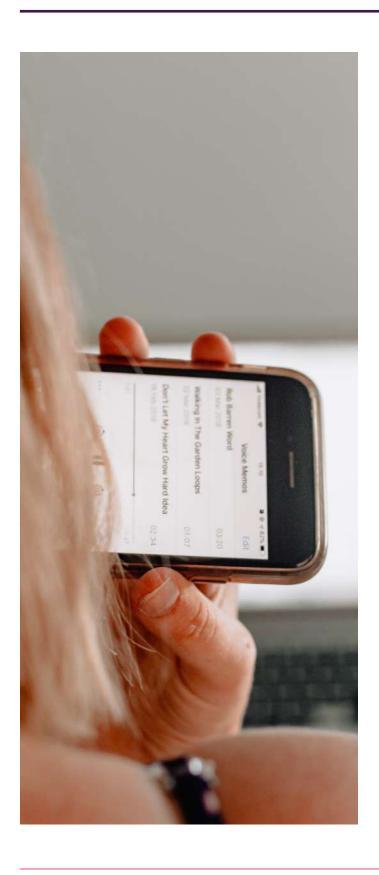
#### Social Media Trust % of Surveyed Consumers

User-generated social media content seems to gaining some grounds. While **34% of consumers** don't trust social media channels, the level of consumers' trust ranges based on the social media platforms.<sup>7</sup>

Advertising on social media platforms like Facebook, Linkedin and Twitter are still dominant, with Facebook and YouTube emerging as the are the most trusted social networks.<sup>8</sup> The sheer number of potential audiences is one of the largest benefits of social media advertising.

Not only are social media platforms the perfect place to build a brand's own following—now marketers can send **private** and **sponsored messages** directly to their **targeted customers**. Combined with the popularity of social messaging apps, marketers can now advertise on the app to relevant users.





## **VOICE SEARCH**

Today's consumers want everything instantaneously, easy and accurate. Over **56% of consumers** reach local businesses using voice search last year to find restaurants to home service companies. Thanks to Alexa, Siri, Google Assistant, Cortana and others. According to Google, **20% of all searches** are voice and **55% of households** are expected to own smart speaker devices by 2022. As speech-recognition accuracy continues to rise, we expect voice search to continue to see a rapid growth rate which was predicted that by 2019, **67 million voice devices** would be n homes and offices in the U.S. alone.8

To take advantage of voice search's popularity, businesses and SEO strategists are rapidly getting up to speed in understanding the data and growing popularity of voice search. Today, voice search is becoming the preferred online search method. By 2020, it is estimated that **50% of all online searches** will be driven by voice search.9 It's not that surprisingly that voice search will one day dominate online search space. Voice searches are not the same as text-based searches. Businesses and marketers must modify their SEO strategies to take advantage of voice searches—especially when 46% of **consumers** regularly use voice search to look for a local business.<sup>10</sup>



#### **PRIVACY CONCERNS**

From a digital advertising perspective, 2020 has proven data is the backbone of the digital omni-channel ecosystem with consumer trust is still fundamental to customer relationships. Regulations like the **General Data Protection Regulation** (GDPR) and the California Consumer Protection Act (CCPA) are two examples of consumer protections focused on safeguarding user data privacy. We expect the call for a federal data privacy law will continue to grow louder. A privacy survey conducted by IBM's Institute for Business Value found that **87% of respondents** think companies should be more heavily regulated on personal data management.11

With privacy a being a growing major concern for most Americans, the expose series written by Stuart A. Thompson and Charlie Warzel published by The New York Times seven months ago, helped make data privacy top of mind for consumers and marketers alike.<sup>12</sup> Not surprising, the National Security Agency recently announced that cellphone location data could pose a national-security threat.<sup>13</sup> Both articles exposed how Silicon Valley's practices of collecting and selling **cell phone location** data for advertising and marketing purposes—raising concerns of both citizens and intelligence officials.





# **DISPLAY ADVERTISING**

Display ads, also known as banner ads, come in wide variety of shapes and sizes. Banner ads can be featured in blogs, embedded in video platforms or mobile apps, as well as social media. Since retargeting technology has begun to mature, native advertising has seen a resurgence and departure from its previous spay-and-pray method. Today, marketers can target consumer keywords, serving relevant information to users and their specific interests. Retargeting, which leverages a user's visit history on a website, gathers information and is a very powerful tool. Marketers are using that intel to create custom messages or content to match their audiences' interest.

### **DEVICE TYPES**

Mobile advertising reached \$40 billion during the first half of 2019—a 29% increase from the same period in 2018.14 Matter of fact, according to IAB, 69% of total Internet advertising revenue was mobile-based with desktop a close second at 39%. Supporting data demonstrates that mobile ads have a high click-through-rate (CTR) demonstrating that users are willing to spend money on their phone. The key take away is that while mobile advertising is dominating digital advertising, marketers need to incorporate both desktop and mobile platforms in order to maximize reach across multiple screens. Adopting a mobilefirst strategy and mobile-specific optimized content is highly recommended.





# "If your plans don't include mobile, your plans are not finished,"

- Wendy Clark, SVP Cola-Cola

# THE TOP 2021 ADVERTISING TRENDS:

#### **MOBILE-FIRST**

Mobile usages continues to be a primary driver of the mobile advertising growth rate accounting for **72%** of U.S. digital advertisements in 2019 were attributed to mobile ads. Many believe mobile will continue to have persistent growth due daily time spent with media on smartphones. When you consider that more than half of online traffic around the world comes from mobile devices. Today most consumers use their phones for a significant portion of shopping, browsing, and entertainment. Mobile has affected almost all of the digital advertising trends, for instance, most videos are now filmed in an upright position to create what's called a vertical video because the vertical format is perform for mobile viewing.

There are many benefits to mobile advertising which include:

- Users can instantly respond to an ad 15
- Mobile ads don't require much content to be engaging 15
- Data created is easily captured 15
- Provides information to consumers in real-time 15
- The intended audience is easier to be tracked and targeted 15
- Thanks to secure, mobile payment technology, transactions are seamless
- U.S. mobile search ad spending is estimated to be over \$28.25 billion in 2019 16
- 80% of users used a mobile device for search on the Internet in 2019 16
- Nearly 50% mobile users read reviews of all purchases on their mobile phone 16
- More than 75% of shoppers use mobile devices to assist them in their physical shopping 16
- 40% of online transactions are completed using a mobile device <sup>16</sup>
- More than 50% of mobile users say speed is important <sup>16</sup>
- 3 out of 4 teens regularly make purchases online using their mobile device 16
- In the U.S. mobile usage makes up around 40% of online Internet traffic 16
- Nearly half of all mobile users switch to your competitor after a bad experience 16



#### **TARGETING**

In order to catch consumers' attention, remain memorable, and most importantly, inspire some sort of follow-up with the brand—today's creative ads need to stand out. We have witnessed a growing trend marketers have been leveraging in 2020 and that is the use of **first-party data**.

First-party data is the information collected directly from an audience or customers. It includes data from behaviors, actions or interests demonstrated across website(s). Another trend gaining popularity is **contextual targeting**. Contextual targeting is also a very cost-effective way of advertising, because it doesn't rely on data, but instead, is topic-focused—where ads are matched to **keywords** extracted from the content. Keep in mind, **49% of users** say they might disregard a brand if it bombards them with irrelevant ads. Yet conversely, **36% of users** say they might actually purchase something from a brand that sends them tailored messages—hence the growing trend towards personalization.

#### **PERSONALIZATION**

While this isn't a new trend, it is one that is increasingly popular amongst consumers. Marketers are investing new ways to get to know their customers better by tracking **clicked links**, **customer behavior**, **purchase history**, **survey responses**, **social media** and **geo-spatial location data**. The emergence of **personalization** is a byproduct of marketers trying to differentiate themselves and their advertising campaigns. Just turn on Netflix or Amazon to see excellent examples of personalization at its best. According to a study published by InstaPage, **80% of all consumers** report they are more likely to buy from a brand that offers personalized experiences. <sup>17</sup>

Consider these personalization stats:

- 63% of consumers are highly annoyed with generic advertising 18
- 80% say they are likely to do business with a company if it offers personalized experiences 18
- 90% claim they find personalization appealing 18
- Personalized emails do **3X better** than their batch-and-blast counterparts 18
- Email remains the most personalized channel 18
- 98% of marketers overwhelmingly agree that personalization helps advance customer relationships with 79% claiming it has a "strong" or "extremely strong" impact 18
- **40% of U.S. consumers** have purchased something more expensive than they originally planned because their experience was personalized <sup>19</sup>
- 91% of consumers are more likely to shop with brands who provide relevant offers and recommendations <sup>20</sup>
- 70% of millennials are willing to let retailers track their browsing and shopping behaviors in exchange for a better shopping experience <sup>21</sup>





# OTT / CTV

# Over The Top and Connected TV

advertising refers to television content delivered through the Internet and viewed on television screens either through smart TVs, or an external device such as Roku, Apple TV or a gaming console like Playstation or XBOX. With the number of newcomers entering the streaming world, including Apple TV+ and Disney+, OTT/CTV ad spending is expected to increase next year with **50% of respondents** saying that they will increase their spend while **44%** plan to maintain spend.<sup>22</sup> OTT provides **32%** higher lift in brand perception through CTV compared to traditional TV.<sup>23</sup>

According to a study by eMarketer, video ads account for the vast majority of CTV ad revenues accounting for **\$6.80 billion** of the **\$6.94 billion** spent in 2019. Meanwhile, CTV programmatic video is predicted to increase by double digits to **\$14.2 billion** by 2023.<sup>24</sup>

### **DIGITAL VIDEO**

One of the top trends we are seeing with regards to creative, is the use of videos. Video advertising is arguably the most important trend of 2019 and 2020. Cisco predicts that in 2020, roughly 80% of all internet traffic will be video. This include YouTube but also video ads on browsers and in applications.<sup>22</sup> We expect to see video ad spending continue to rise with advertisers predicted to **spend 25% more** on digital video than they did this year. A recent statistic released by Brightcove stated that 135% increase in global retail & marketing video views.<sup>25</sup> Nearly **3 in 4 buyers** are planning to increase their digital video ad spend in the next 12 months. According to the IAB's 2019 Video Advertising Spend Report, ad spend in digital video continues to accelerate by 25% year over year while 53% of digital video ads are programmatic. is expected to grow 4%+ year over year.26





#### **CREATIVE**

While last year marketed the 25th anniversary of the very first banner ad, since its launch, digital ads have evolved into a very mature form of advertising. Now, thanks to an over abundance of digital ads, the importance of good, relevant creative is still key. According to a study by AppNexus, **97% of all campaigns** include generic creatives, showing ads that are often not relevant for the targeting audience.<sup>27</sup> The combination of over saturation and look-a-like ads that lack relevance, thus losing their effect on audiences.

According to a 2019 Forrester report entitled "The Cost of Losing Creativity", author Jay Pattisall describes this "me too" sameness—that many brands and their content looks exactly the same without any distinguishing elements. Pattisall advisers marketers to shift marketing dollars toward budgeting for creative resources to produce more powerful, differentiated, brand experiences. <sup>28</sup>

### **AI CHATBOTS**

2020 we have witnessed a dramatic rise in the adoption of machine learning and artificial intelligence (AI) powered applications and tools transcending Silicon Valley. Artificial intelligence has seamlessly integrated into our everyday, from intelligent assistants like Siri and Alexa to eCommerce chatbots and advanced navigational apps.

According to Business Insider, 80% of businesses want chatbots by 2020.<sup>29</sup> There are many reasons for them to be excited, ranging from up-selling consumers and reducing high abandoned cart rates, to lead generation and predictive analytics like product recommendations. Al, coupled with the proliferation of messaging apps, is fueling the development of chatbots. Some studies have shown that chatbot technology and mobile apps go hand-inhand when it comes to consumers. A recent survey by Point Source found that 49% of customers are willing to shop more often when Al is present.

The survey also found that **34% of customers** will not only spend more money, but **38%** of them will share their experiences with friends and family.<sup>30</sup> The adoption of chatbot technology has been proliferating, with the global chatbot market expected to reach **\$1.25 billion** by 2025 helping brands increase customer service directing customers to the products they are seeking.



#### **DIRECT-TO-CONSUMER**

With the never-ending news of major brick-and-mortar retailer bankruptcies, many brands are beginning to embrace the direct-to-consumer channel, building a one-to-one direct relationship. Thanks to brands like Casper, Dollar Shave Club and Warby Parker, which focus on mobile and digital channels that bypass traditional TV, print and radio advertising, is driving this **D2C marketing** trends. This approach is a unique opportunity for eCommerce brands to builder stronger, direct relations with their customers—which supports why **84% of consumers** want to engage with brands in a personal, meaningful way.

#### **AD FRAUD**

Global online ad fraud is predicted to cost an unprecedented \$23 billion this year with bot fraud accounting for \$5.8 billion globally. A report from the ANA found that online advertisers are starting to make headway in detecting this fraud. Unfortunately it's not an easy battle to win. While the costs may be difficult to quantify, Juniper Research predicts that by 2022, the loss to mobile advertising fraud is forecasted to reach \$87 billion globally.31 Chief Marketing Officers must stay abreast of the latest developments. We recommend reading The True Costs of Online Ad Fraud white paper we recently published.





"Growing numbers of advertisers are waking up to the importance of objectivity when it comes to advertising and the benefits of investing their spend beyond the walled gardens—whether that's greater control of their data, more transparent pricing or more objective measurement,"

- James Patterson, VP Client Services, The Trade Desk



#### THE FUTURE OF DIGITAL ADVERTISING

The traditional method of media buying were once bought and sold manually by human media buyers. They were traditionally overpriced. Marketers sometimes experienced unreliable dealings with their insertion orders which often required multiple communication. Because of this, marketers became tired of dealing with these middle men and began bringing self-serve programmatic advertising back-in-house.

Since 2016, advertisers and publishers alike, have been quick to embrace **programmatic** to assist their clients better. Thanks to emergence of **self-serving platforms** like **WUNDERWORX**, these agencies are beginning to purchase ads programmatically by-passing antiquated media buyers. According to eMarketer, U.S. advertisers is estimated to spend nearly **\$60 billion on programmatic display** in 2020. By 2021, they estimate almost **88% of all U.S. digital display ad dollars** will transact programmatically.<sup>32</sup>



#### **PROGRAMMATIC TRENDS**

Programmatic advertising uses artificial **intelligence** to automatically buy ads that are served to highly targeted audiences. Some of the reasons driving the rise of programmatic is the data being generated, lower acquisition costs and higher conversion rates. When you combine these benefits with an increased number of channels, media, and real-time bidding. more and more major brands like Netflix and Kellogg have taken programmatic inhouse chiefly because companies want the data. "We've learned a lot about the value and power of first-party data," said Aaron Fetters, Director of the Insights and Analytics Solutions Center at Kellogg Co..33

Programmatic advertising will continue to dominate digital advertising, with mobile ads driving that growth. MediaPost projects that programmatic trading will reach \$147 billion by 2021. According to MediaPost, programmatic ad spend is expected to grow to 72% in 2021.<sup>34</sup> According to IAB, advertisers plan to allocate 50% of their digital video spend with programmatic advertising.

"The ongoing death of the cookie means that the industry needs to rethink the way we design targeting and personalization while respecting consumers' privacy rights. High-quality, first-party data is more vital to the success of programmatic marketing than ever before," said Matt James, Global Brand President, at Zenith.

The United States is, by far, the largest programmatic market of ad spend estimated at \$67 billion followed by China at \$10 billion. China is expected to jump to \$16 billion by 2021. The Association of National Advertisers found that 35% of its marketers expanded their in-house programmatic media buying in 2018—more than double then the year prior.<sup>35</sup>

#### **HYBRID IN-HOUSE ADVERTISING**

In 2018 we saw a seismic shift within the ad industry as large brands began to scale up their internal marketing departments and brought most of those once outsourced functions in-house. With **data privacy** being an increasing concern, more and more marketers are adopting **in-house programmatic** since data privacy has become an increasing concern of consumers.

While most marketers are starting to realize the importance of creatives, they are also exploring new hybrid ways to **gain efficiencies** and get more bang for their marketing budgets. In-housing is often considered to be cost effective. The reality is a combination use of agencies, advertisers and other partners leveraging the collective shared knowledge and streamlined workflow is showing the best of both words. This trend may be limited to larger brands, but association of Association of National Advertisers (ANA) reported that **78%** of its members bought advertising in-house.<sup>36</sup>





#### **SELF-SERVE AD BUYING**

In addition to the privacy concerns of their customers, businesses are gaining the massive benefit of owning the **first-party data** as one of the **greatest benefits** of inhouse **programmatic advertising**.

Traditionally, brands were accustomed to outsourcing their media buys due to the complex nature of the ecosystem. The transparency and arbitrage with regards to the pricing of media and ease-of-use is a driving factor to the adoption of **self-serve** ad buying platforms like **WUNDERWORX**.

#### **AGENCY TRENDS**

The lack of time and exercise needed to run programmatic is why almost half of marketers outsource their advertising traffic and ongoing campaign management—including pacing, QA testing and third-party discrepancy monitoring.

Outsourcing media execution has been a great businesses arrangement between brands and their resource restraints of many brands.

With the ease of use of many self-serve ad buying platforms like **WUNDERWORX**, agencies are considering adding this capability in-house to increase their offering and bring additional services to the table. Listed below are five considerations you should consider when looking to adopt a self-serve programmatic platform at your agency:

- 1. Research: Do your homework to find the right platform for you. Many of the platform list their core functionality on their website. In a recent competitive study conducted by **WUNDERWORX**, trying to schedule a demonstration can be a challenge. They key agencies need to ensure is the sophistication of the platform and ease-of-use. Determine if the platform offers continued levels of support or managed services. Are the analytics comprehensive, providing your ad operators the granular data they may be looking for to adjust the pacing and **A/B testing** results?
- 2. One Step At A Time: The journey of a thousand steps starts with the first step. Have your staff take the time to scour the platform's online help, tutorials and education documentation. With just a few hours, your media buyers and ad ops staff can get up to proficiency easy.





3. Test Drive: At WUNDERWORX we offer 150,000 to 300,000 free monthly impressions depending upon your monthly subscription plan. While 150K or 300K free impressions is not enough to run a full campaign, it is enough to offset your cost in a successful A/B test campaign.

4. Monetization: Since the advent of digital advertising, advertising agencies have been providing these services for years. Now thanks to self-service platforms like WUNDERWORX, the barriers to entry are small allowing for public relations firms and agencies such as creative studies, web design firms, branding agencies, social media marketing agencies to expand their offerings, generate more value to their clients, differentiating themselves while increasing their bottom line.

**5. Managed Services:** While our self-serve platform is easy get started,

**WUNDERWORX** provides a complimentary **SEO Audit** of your website to all of our customers with our subscription plans.

# **INTERESTED IN LEARNING MORE?**

**WUNDERWORX** is helping agencies and small businesses take control through our self-serve ad buying platform.

wunderwork provides the power of real-time programmatic advertising campaigns across all devices and media, leveraging sophisticated geo-spatial audience building technology from our easy-to-use dashboard. Give us a call and let us demonstrate how programmatic, paid search and SEO can help your business grow.



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