



## PROGRAMMATIC I/O

# The Creative Renaissance Is Upon Us: The State Of Creative Advertising Technologies



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# The Creative Renaissance Is Upon Us: The State Of Creative Advertising Technologies

Joanna O'Connell, VP Principal Analyst

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## The age old wisdom on creative

*“Advertising is fundamentally **persuasion**, and persuasion happens to be **not a science**, but an **art**.”*



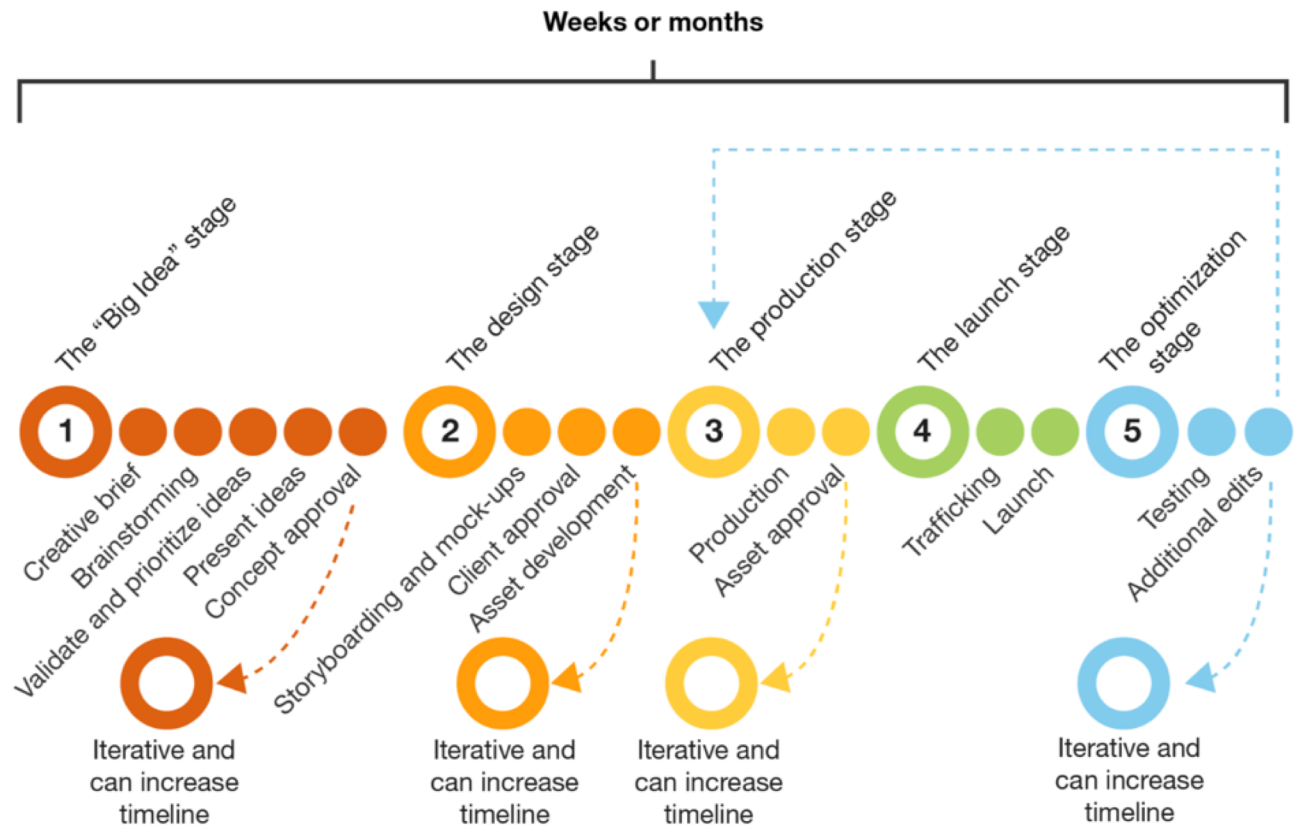
*William Bernbach  
Founder - Doyle Dane Bernbach*

## In the bygone Mad Men era the "big idea" was king

*"I'd like to teach  
the world to sing  
in perfect  
harmony...."*



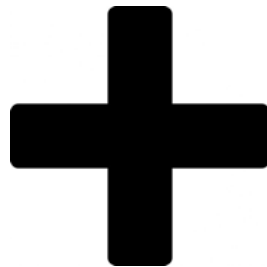
And the creative process was (IS!) time-consuming and unidirectional



Source: Forrester Research, Vendor Landscape: Creative Advertising Technologies, Q3 2017

# But there's a new reality in advertising

Data and targeting across channels, formats, and devices



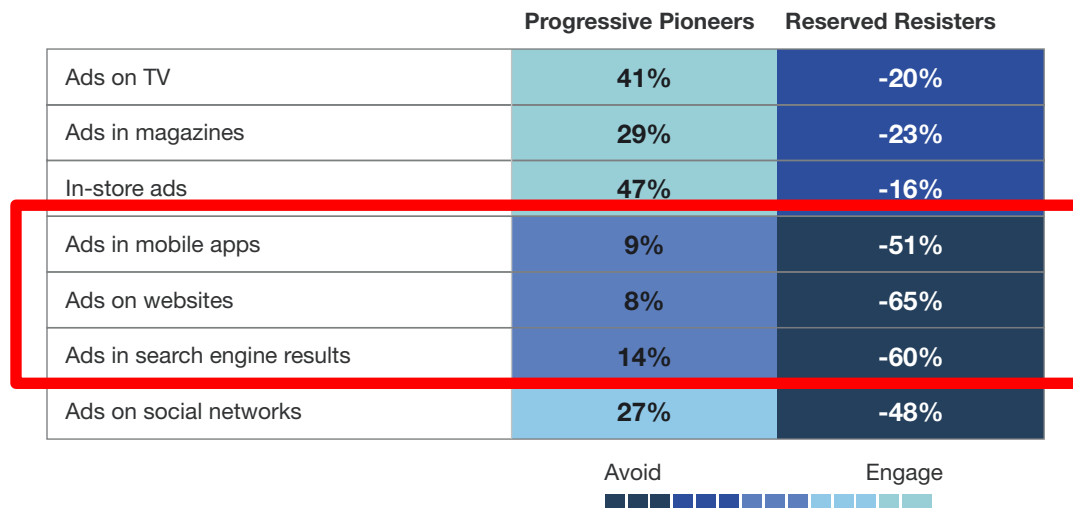
Advertising  
Email  
Search  
Social

Display  
Video  
Audio

Desktop  
Mobile  
Television  
Print  
Out-of-Home  
Audio

# And a consumer-base that's harder to please than ever

“What best describes your behavior when you see or hear this type of advertising?”



Base: 8,869 to 20,789 US online adults (18+)

Note: Not all answers are shown; Percentages represent the degree to which each segment skews toward avoiding or engaging with the ad type, calculated by subtracting the percentage of respondents who avoid the ad from the percentage who engage with it.

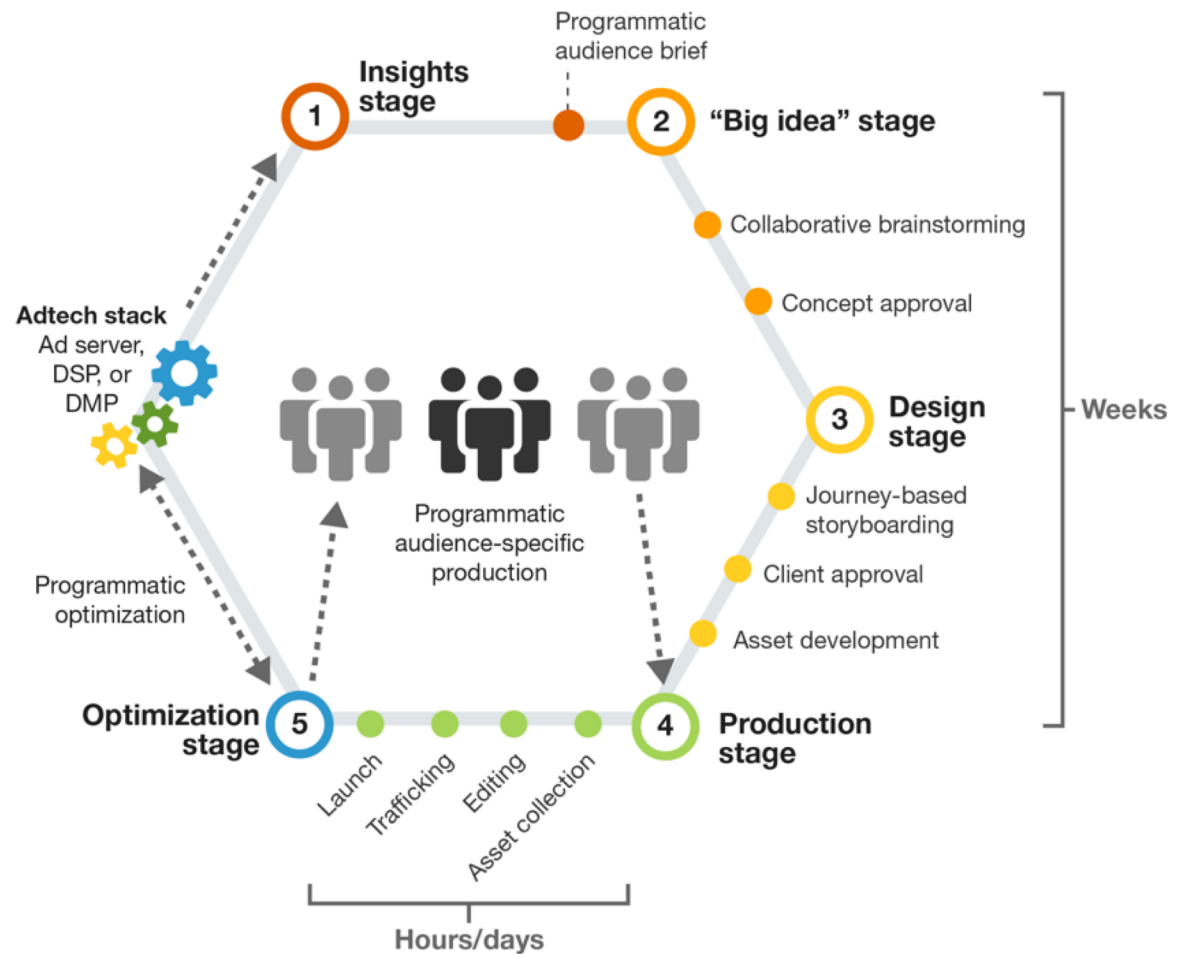
Source: Forrester Analytics Consumer Technographics® North American Online Benchmark Survey (Part 1), 2018

Source: Forrester Research, The Future of Omnichannel Advertising Must be Customer Obsessed, June, 2018



# The creative process MUST evolve to keep apace

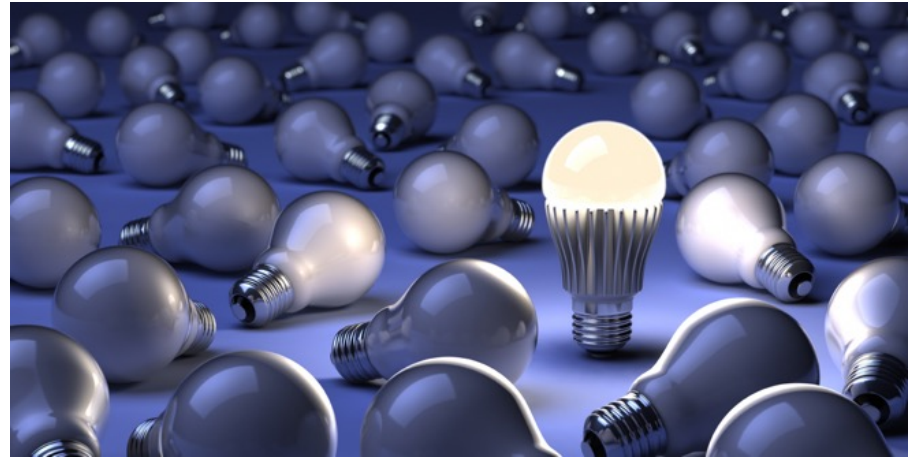
- ✓ Faster
- ✓ More iterative
- ✓ More data-infused
- ✓ More collaborative
- ✓ More omnichannel



Source: Forrester Research, The Forrester Wave™: Creative Advertising Technologies, Q4 2018

## An evolving category of vendors – creative adtech – has emerged to help marketers:

- › Use data-driven insights to generate more relevant ads
- › Enjoy faster, more efficient speed-to-market
- › Exercise centralized control over distributed creative tasks



# They evolved out of two main categories, defined by focus and functionality

	Dynamic creative optimization	Creative management platform
	Automatic deployment of templated ads governed by rules that influence creative components	Automation used to quickly produce multiple version of a creative, e.g., multiple sizes at once
<b>Ad building</b>	Ads built in real time	Ads can be prebuild mu quickly
<b>Coding requirements</b>	Code used to implement rules for automatic deployment	No coding requirements to build ads using creative management platform
<b>Creative decisions</b>	Internal decisioning engines dictate optimization	Creative decisioning dictated by external engines, e.g., creative optimization within a demand-side platform
<b>Data dependencies</b>	Dependent on data signals to drive variation of creative to be delivered	Does not require data to dictate creative variations

Direct Response

Brand

129422

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Source: Forrester Research, Vendor Landscape: Creative Advertising Technologies, Q3 2017

**And fall into two primary "flavors" today**



# Forrester Wave™: Creative Advertising Technologies, Q4 2018



\*A gray marker indicates incomplete vendor participation.

Source: Forrester Research, The Forrester Wave: Creative Advertising Technologies, Q4 2018

# How do CAT vendors stack up?

		Forrester's weighting	Adacado Technologies	Adform	Celtra	Clinch	Flashtalking	Google*	Jivox Corporation	RevJet	Sizmek	Thunder
<b>Current offering</b>	50%	2.56	4.23	3.40	3.52	4.20	2.67	4.49	4.38	3.71	4.60	
Ad-building tools	20%	1.40	5.00	4.50	3.50	4.00	3.90	4.40	5.00	4.50	4.00	
Versioning, ad assembly, and decisioning	30%	3.10	4.60	3.00	3.90	4.00	3.80	4.70	4.10	3.70	5.00	
Cross-channel/format capabilities	25%	2.00	3.00	3.00	3.00	5.00	1.00	5.00	5.00	3.00	5.00	
Ad server	5%	4.00	5.00	3.00	4.00	5.00	4.00	5.00	4.00	5.00	4.00	
Standard reporting tools and insights	5%	1.00	5.00	5.00	5.00	5.00	3.00	5.00	5.00	5.00	5.00	
Service models/training/customer support	15%	4.00	4.00	3.00	3.00	3.00	1.00	3.00	3.00	3.00	4.00	

Source: Forrester Research, The Forrester Wave: Creative Advertising Technologies, Q4 2018

# How do CAT vendors stack up?

		Forrester's weighting	Adacado Technologies	Adform	Celtra	Clinch	Flashtalking	Google*	Jivox Corporation	RevJet	Sizmek	Thunder
<b>Market presence</b>	0%	1.40	3.80	2.80	2.80	4.40	3.00	3.80	3.00	3.40	4.00	
Revenue	20%	1.00	5.00	3.00	1.00	5.00	3.00	3.00	1.00	5.00	3.00	
Number of customers	20%	1.00	5.00	3.00	1.00	5.00	3.00	3.00	1.00	5.00	3.00	
Customer makeup by size	20%	1.00	3.00	1.00	3.00	5.00	3.00	5.00	5.00	1.00	5.00	
Customer makeup by type	20%	1.00	1.00	3.00	5.00	3.00	3.00	3.00	5.00	1.00	5.00	
Number of employees by type	10%	5.00	5.00	5.00	3.00	5.00	3.00	5.00	3.00	5.00	5.00	
Geographic footprint	10%	1.00	5.00	3.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00	

All scores are based on a scale of 0 (weak) to 5 (strong).  
 \*Indicates a nonparticipating vendor.

Source: Forrester Research, The Forrester Wave: Creative Advertising Technologies, Q4 2018

# Who's the customer-base?

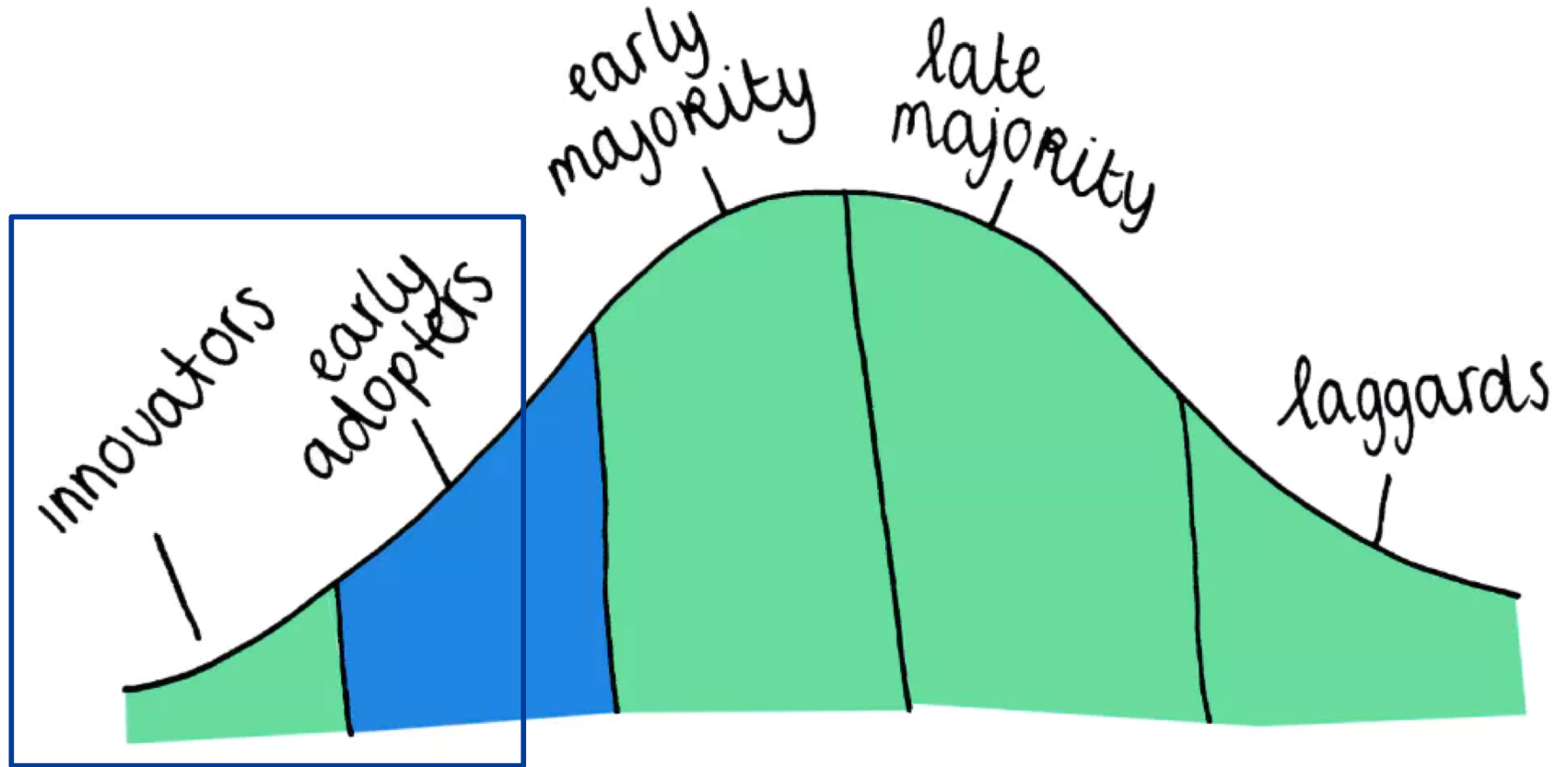
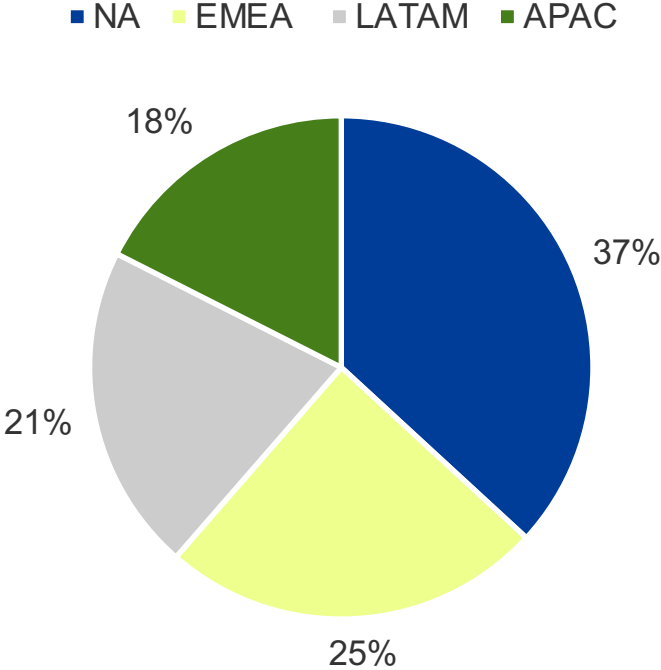


Image source: Rockstart.com



# It's a global group

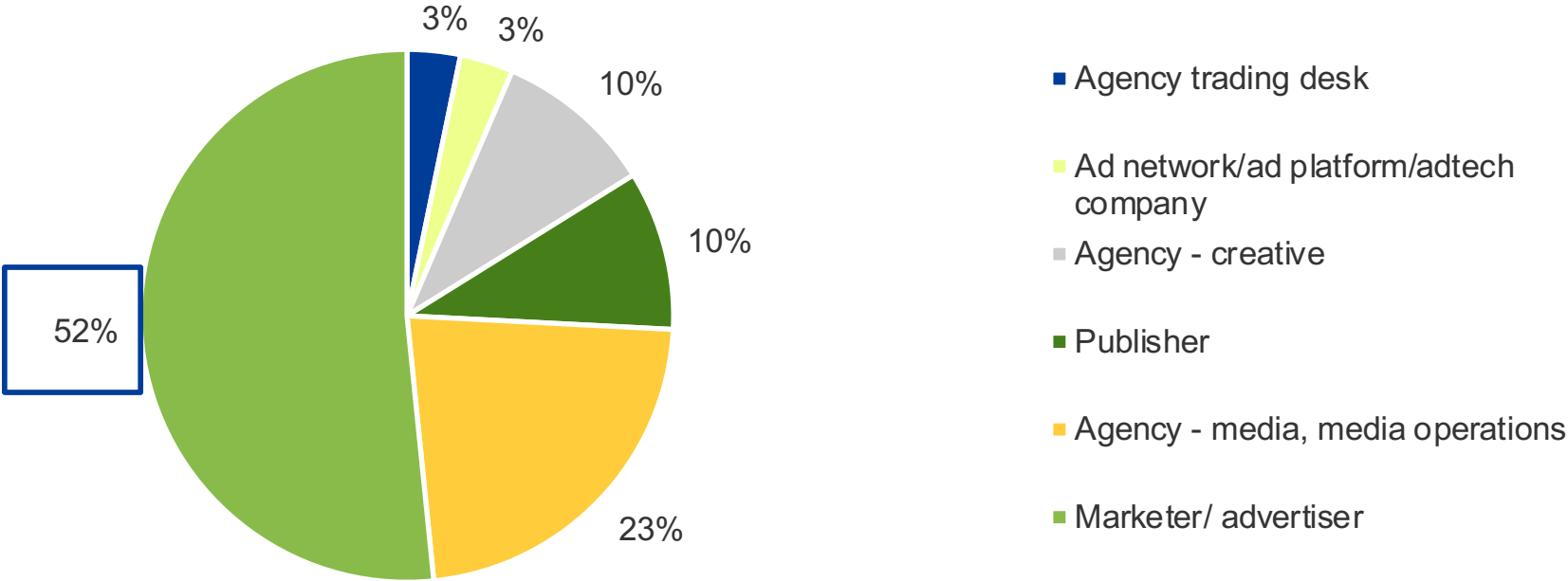
## In which markets do you do business?



Base: 31 respondents who work with a creative adtech vendor  
Note: Multiple answers accepted  
Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# Marketers are leaning in

## Which of the following best describes your company?



Base: 31 respondents who work with a creative adtech vendor  
Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# These are marketers with creative oversight

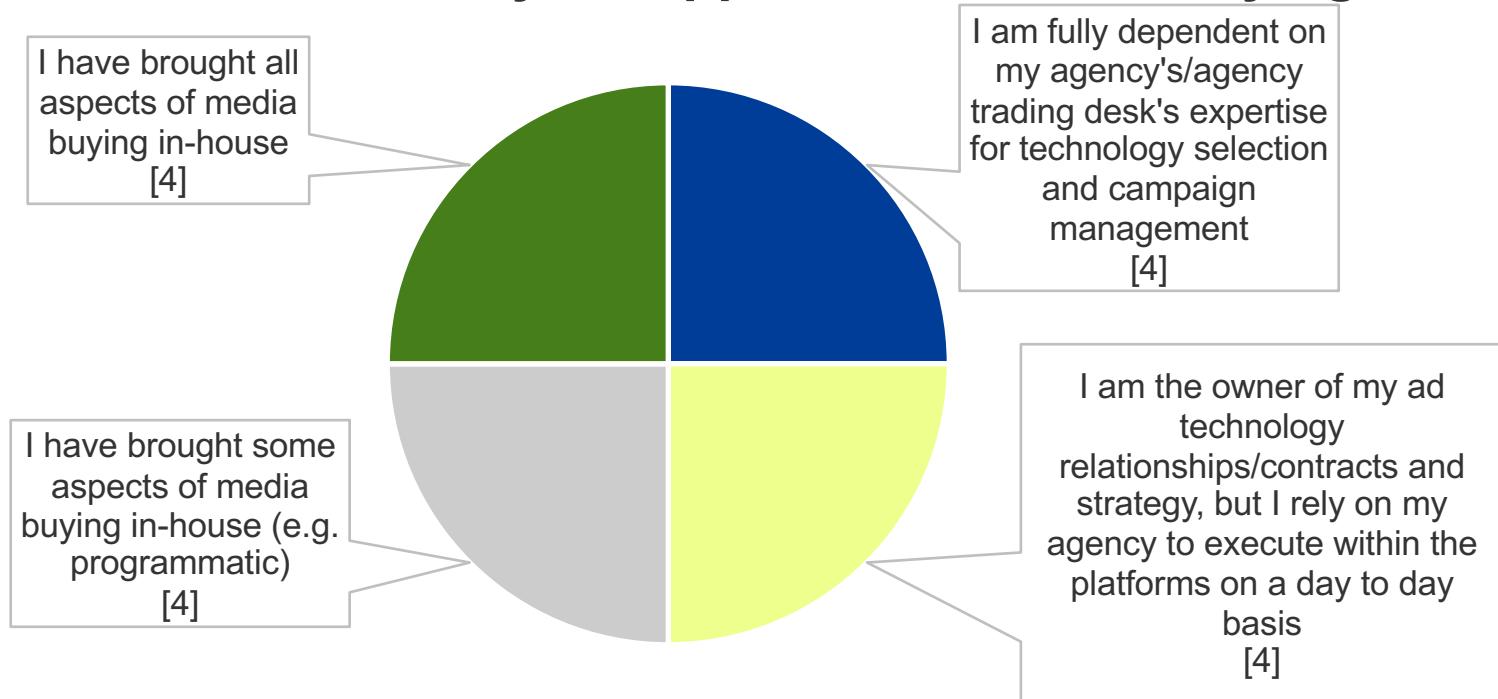
What best describes your approach to advertising creative?



Base: 16 marketers and advertisers  
Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# Though media management approaches vary

## What best describes your approach to media buying?

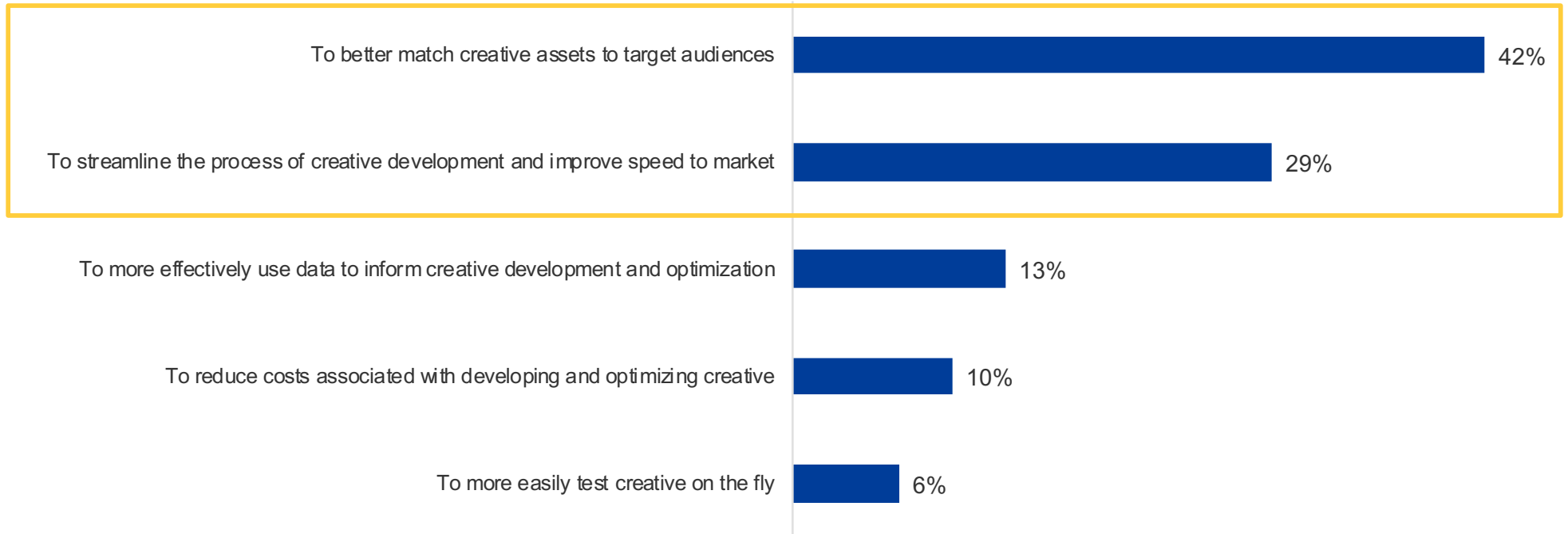


Base: 16 marketers and advertisers

Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# Motivation? Personalization and speed!

## Why did you choose to work with a creative adtech vendor?



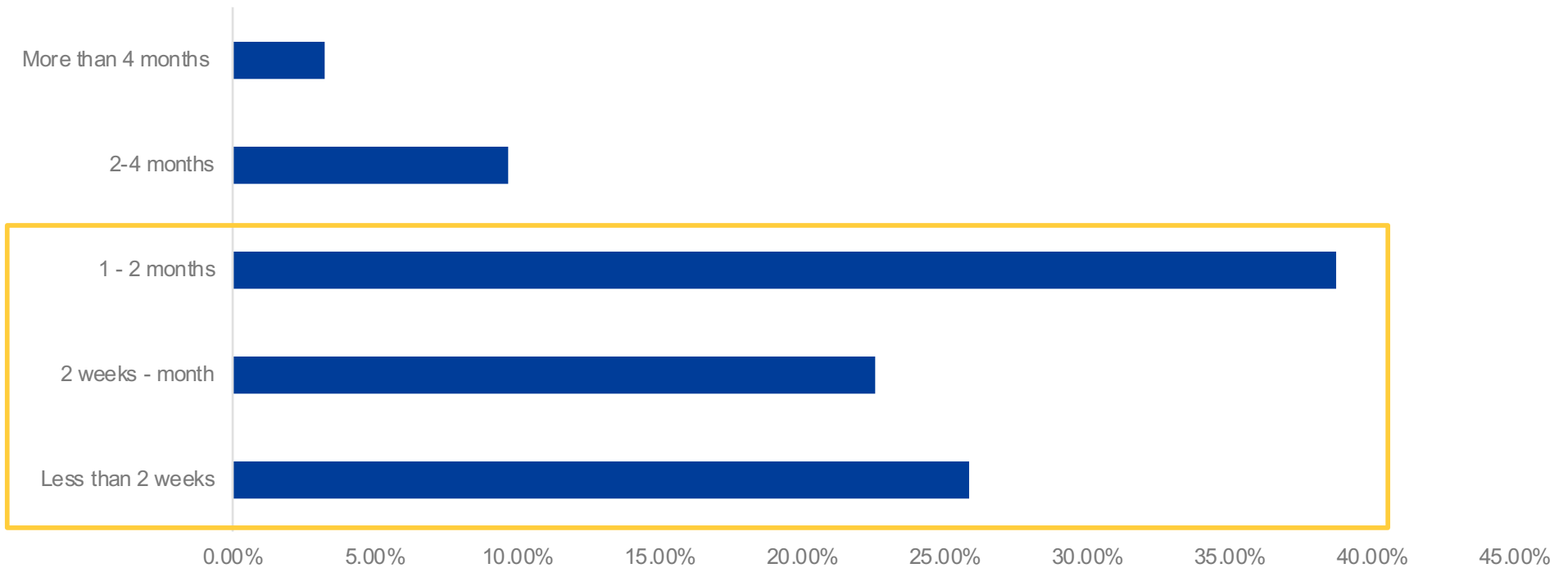
Base: 31 respondents who work with a creative adtech vendor

Note: Respondents ranked in order of importance with 1 being the most important and 5 being the least. Only answers ranked as 1 are shown. Not all answers are shown.

Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# And a bonus, people got up and running quickly!

How long did it take to get your creative adtech vendor up and running? Total %

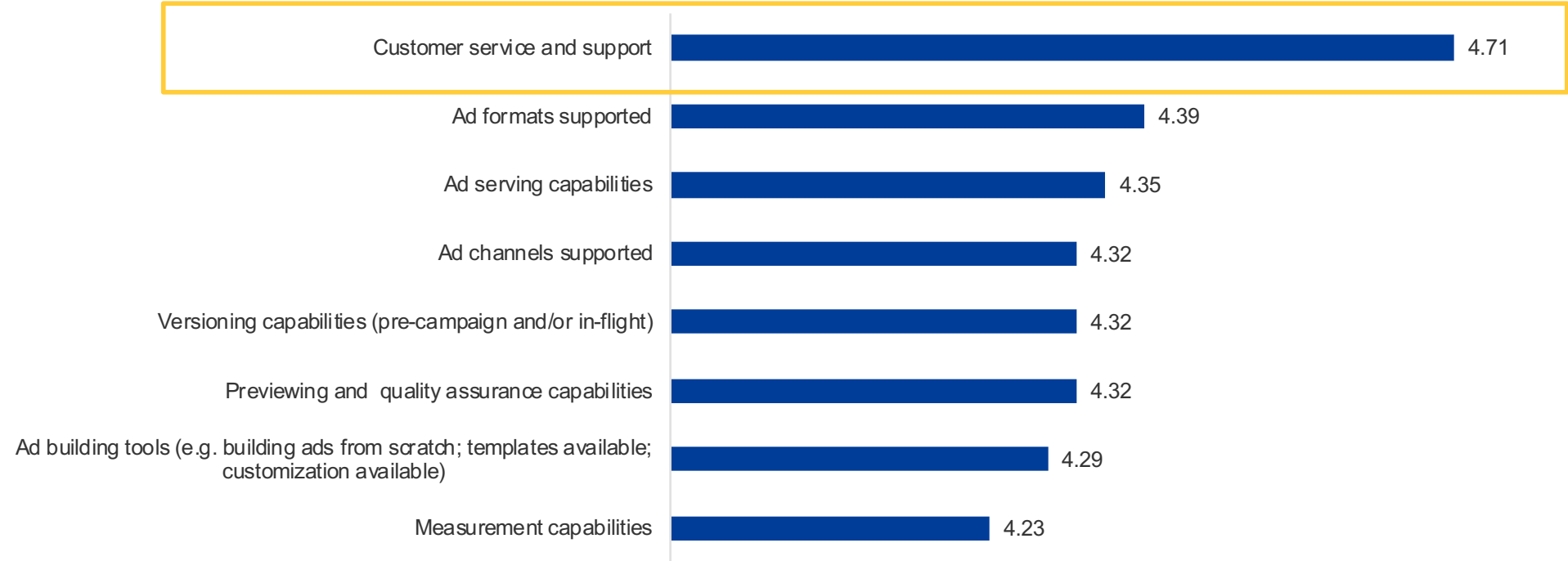


Base: 31 respondents who work with a creative adtech vendor

Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# Service shines in satisfaction scores...

How satisfied are you with your vendor's offerings for each of the following?



Base: 31 respondents who work with a creative adtech vendor  
Note: Respondents ranked in order of importance with 5 being the most important and 1 being the least. Answers shown are the mean.  
Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

# ...while strategy and cross-device/channel less so

How satisfied are you with your vendor's offerings for each of the following?  
(Cont.)



Base: 31 respondents who work with a creative adtech vendor

Note: Respondents ranked in order of importance with 5 being the most important and 1 being the least. Answers shown are the mean.

Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey



## Today, it's a highly nascent space

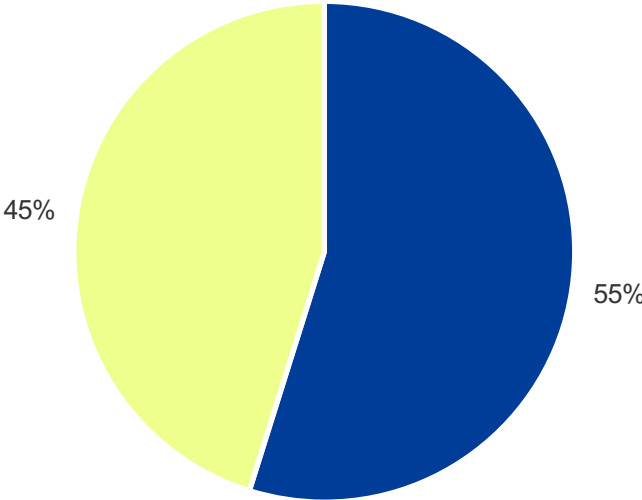
- › Marketers are just beginning to experiment and are heavily reliant on vendor help.
- › Vendors have bold visions for the future, but the category feels “startup” in nature.



# CAT customers aren't committed en masse

**If you could find the same capabilities with a different creative adtech vendor than your primary adtech vendor for a lower cost, would you switch?**

- Yes, we would consider switching vendors
- No, we would not consider switching vendors



Base: 31 respondents who work with a creative adtech vendor  
Source: Forrester Wave Creative Advertising Technologies Q4, 2018 Customer Reference Survey

## Areas of investment and opportunity

- › Artificial intelligence capabilities: machine learning, semantic and visual recognition, AI enabled predictive analytics
- › More channels, more cross channel capabilities
- › Self-serve and collaboration capabilities
- › Deeper integration with media decisioning



# We anticipate continued merging and consolidation

## Standalone CAT



## Consolidated Stacks



Adobe

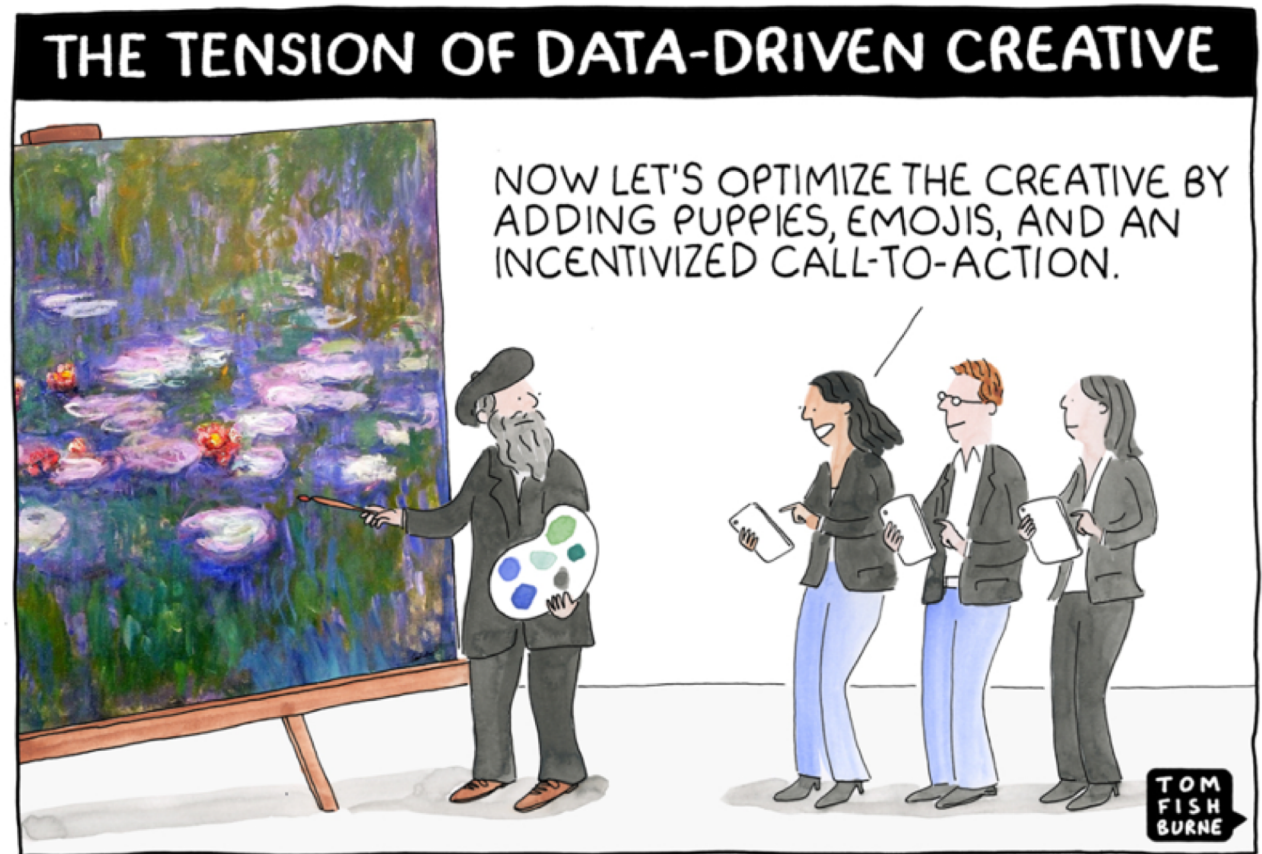
adform

# What are some do's and don'ts?



Image source: rentfaxpro.com

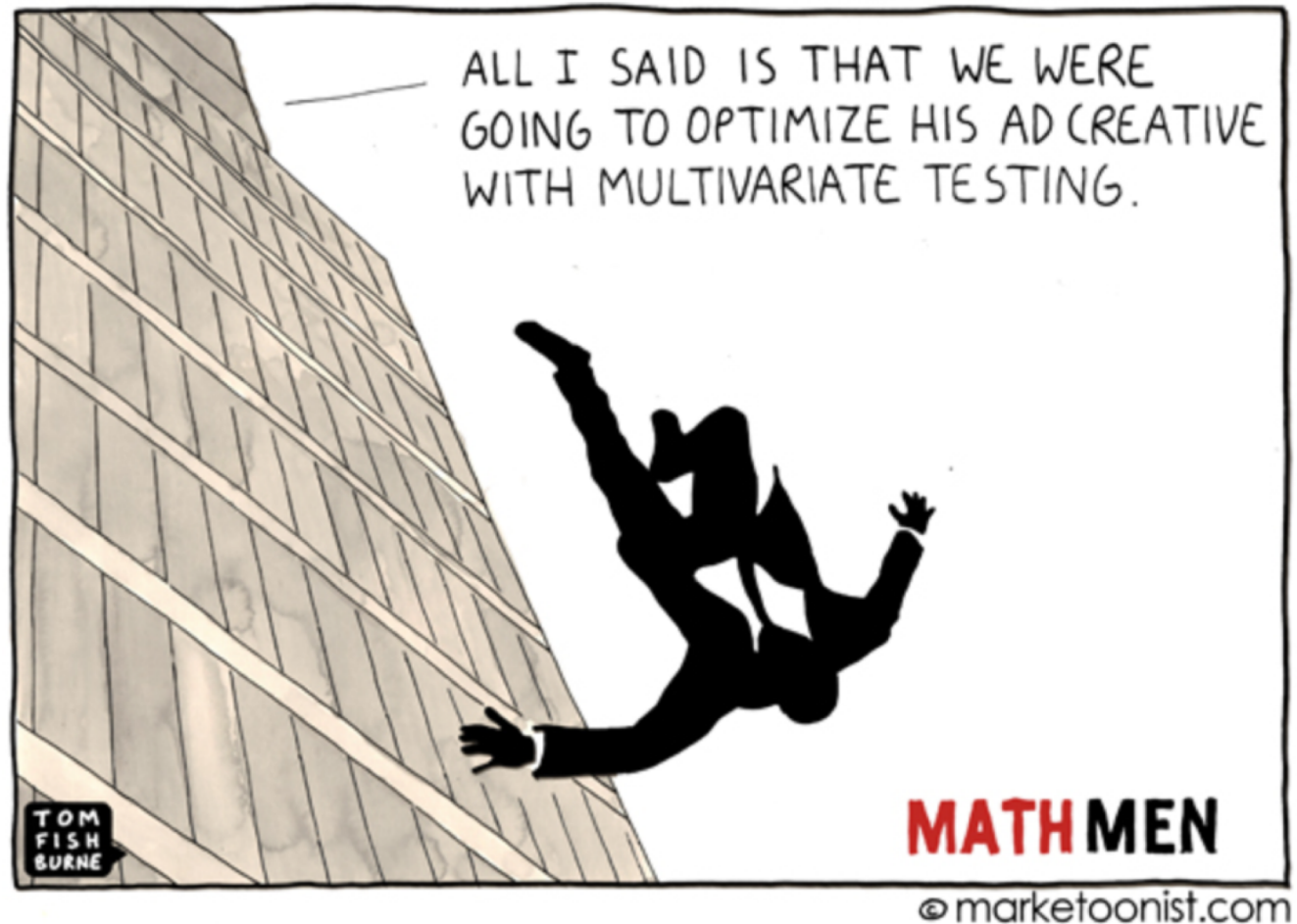
**DON'T** treat data-driven thinking as an after-the-fact in the creative process



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Source: Marketoonist.com

**DO make CAT  
a tool that can  
touch/help  
that *all* parties  
in the creative  
process**



Source: Marketoonist.com

# DON'T substitute tech reliance for strategic thinking

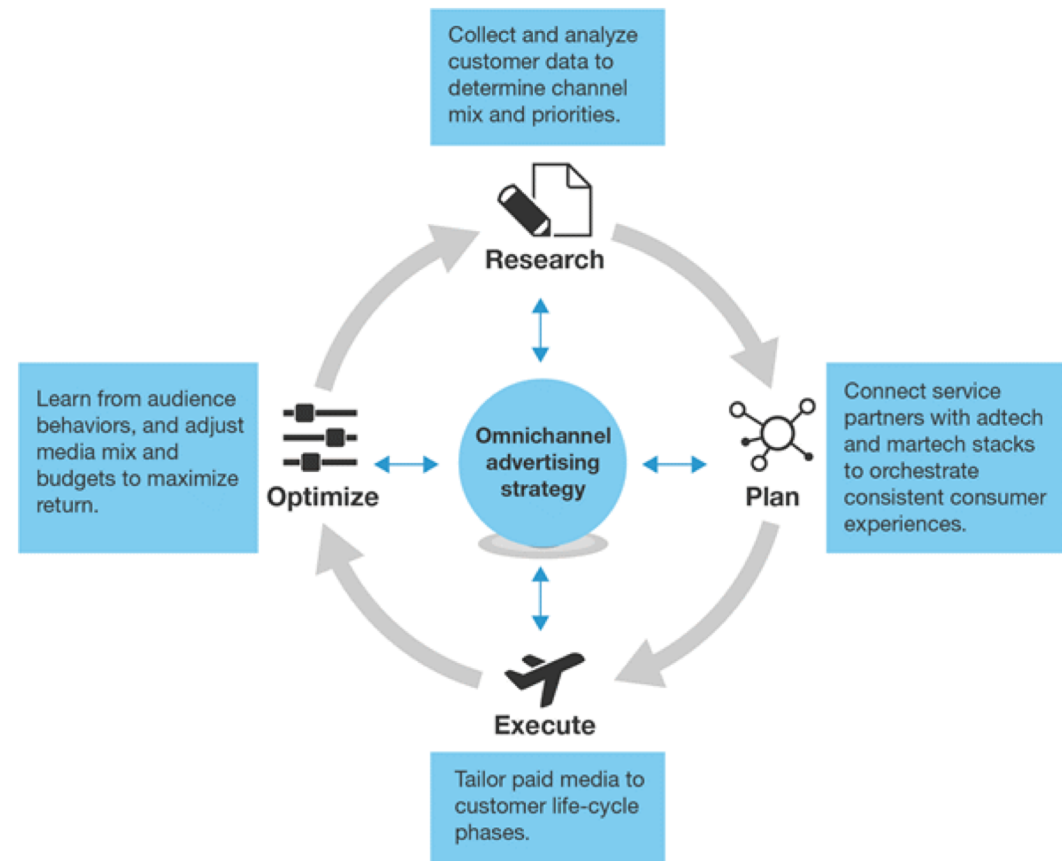


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# DO think omnichannel from the start



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Thank you

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