Report Price: £3695 | \$4995 | €4400

e above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MINTEL

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and advertising
- Sales performance of US digital advertising, as a whole and by segment
- How consumers respond to various forms of digital ads they've encountered
- Attitudes toward digital advertising and key consumer segments

66

"Digital behaviors and digital media consumption increased post COVID-19, and it has never been more important for brands to have a strong, comprehensive, efficient digital marketing strategy for success. Brands that do not leverage the vast arrays of media sources and technology will lose out to their competitors who do." – Buddy Lo, Sr. Technology and Consumer Electronics

and Consumer Electronics Analyst

Buy th	Buy this report now	
Visit	store.mintel.com	
EMEA	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
Americas +1 (312) 943 5250		
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- What you need to know
- This Report looks at the following areas
- Definition
- Market context
- Economic and other assumptions
- COVID-19: US context

EXECUTIVE SUMMARY

- Top takeaways
- Market overview

Figure 1: Total US digital advertising revenues and fan chart forecast, at current prices, 2016-26

- Impact of COVID-19 on digital advertising
 Figure 2: Short-, medium- and long-term impact of COVID-19 on digital advertising, 2021
- Opportunities and challenges
- Legislation poses potential risk
- Growth across all segments of digital advertising Figure 3: Breakout of US digital ad spend, by segment, at current prices, 2018-21
- Social media advertising has the highest recall and positive associations

Figure 4: Perceptions of digital ads, 2021

- SVoD ads viewed more positively than pre-roll video ads Figure 5: Perceptions of video streaming and pre-roll video ads, by consumers who recall a video streaming or pre-roll video ad within the past three months, 2021
- Hyper Digital Users and Mainstream Digital Users are key consumer segments

Figure 6: Consumer segments of attitudes toward digital advertising, 2021

THE MARKET - KEY TAKEAWAYS

- Digital advertising industry thrives post COVID-19
- All digital marketing channels estimated for growth in 2021
- Digital video advertising growing the fastest
- Alternative digital advertising looks to expand
- Digital advertising needs to overcome issues with credibility
- Privacy changes will bolster big tech's role in digital advertising

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARKET SIZE AND FORECAST

• Digital advertising thrives

Figure 7: Total US digital advertising revenues and fan chart forecast, at current prices, 2016-26 Figure 8: Total US sales and forecast of digital advertising revenues, at current prices, 2016-26

Impact of COVID-19 on digital advertising

SEGMENT PERFORMANCE

- Both mobile and desktop platforms see gains in 2020 Figure 9: US digital ad revenue, by desktop and mobile, 2012-20
- All digital advertising channels grew in 2020, increases expected for 2021

Figure 10: Breakout of US digital ad spend, by segment, at current prices, 2018-21

 Search advertising offers efficiency for large and small firms

Figure 11: Total US search advertising revenues and fan chart forecast, at current prices, 2016-26

Figure 12: Total US search advertising revenues and forecast, at current prices, 2016-26

• Display advertising grows with better targeting and tracking capabilities

Figure 13: Total US display advertising revenues and fan chart forecast, at current prices, 2016-26 Figure 14: Total US display advertising revenues and forecast, at current prices, 2016-26

• Digital video benefits greatly from the shift to in-home digital entertainment

Figure 15: Total US digital video advertising revenues and fan chart forecast, at current prices, 2016-26 Figure 16: Total US digital video advertising revenues and forecast, at current prices, 2016-26

Alternative digital ads present new opportunities for brands
 Figure 17: Total US "other" digital advertising revenues and
 fan chart forecast, at current prices, 2016-26
 Figure 18: Total US digital video advertising revenues and
 forecast, at current prices, 2016-26

MARKET PERSPECTIVE

• Credibility a concern for digital marketers Figure 19: Psychographics – Attitudes toward advertising, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MARKET FACTORS

- Legislation looms as Sword of Damocles over digital marketing
- Apple and Google grant users additional privacy control
- Cookieless practices bolster big tech's space in digital advertising
- Digital marketing booms despite drop in economic activity following pandemic
- Nielsen loses MRC accreditation
- Growth in younger demographics increases the value of digital channels

COMPANIES AND BRANDS – KEY TAKEAWAYS

- Alphabet's Google search revenues generated nearly \$150 billion in 2020
- Amazon's advertising arm a major player in the digital ad space
- Facebook's family of services has 2.6 billion active users
- Targeted digital video advertising has major potential for growth

MARKET SHARE

Alphabet forecasts significant search revenue growth in 2021

Figure 20: Alphabet advertising revenues, by alphabet advertising properties, 2017-21

 Amazon's advertising sector sees high year over year growth

Figure 21: Amazon sales of advertising services and other service offerings, 2016-21

Facebook

Figure 22: Facebook advertising revenues, 2016-21

- **Snapchat** Figure 23: Snapchat revenues, 2016-21
- Spotify

Figure 24: Spotify total and ad-supported revenues, 2016-21

• Twitter

Figure 25: Twitter advertising services revenues, 2016-21

• The Trade Desk Figure 26: The Trade Desk revenues, 2016-21

MARKET OPPORTUNITIES

 More targeted digital video advertising should play a growing role

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Cars.com launches Fuel In-Market Video
- Influencers can help brands raise awareness and credibility
- Video gaming well positioned for sizeable role in digital advertising
- Facebook's Libra cryptocurrency could incentivize users to stay within Facebook's network

THE CONSUMER – KEY TAKEAWAYS

- Digital media consumption widespread
- Social media ads have highest recall
- Unsubscribing or marking emails as read without reading are issues for email marketing
- Podcast ads and pre-roll video ads have highest risk for skipping
- Podcast ads have positive perceptions among listeners
- Consumers most comfortable sharing their email address with marketers
- Personalization and entertainment are winning themes
- Mainstream Digital Users and Hyper Digital Users are key consumer segments

MEDIA CONSUMPTION

- Nearly all consumers watch or listen to digital media Figure 27: Media consumption in an average month, 2021
- **Digital content draws much younger audience** Figure 28: Age distribution of content consumers, by media content, 2021
- Cable/satellite network TV has largest share of exclusive audience

Figure 29: Sole media usage, 2021 Figure 30: Number of media sources consumed in an average month, by media type consumed, 2021

• Black consumers more likely to use low-cost services Figure 31: Media consumption, by race and Hispanic origin, 2021

DIGITAL ADS RECALLED

 Half of consumers recall a social media ad within the past three months

Figure 32: Digital ads recalled within the past three months, 2021

 Age and digital behaviors drive digital ad recall
 Figure 33: Digital ads recalled within the past three months, by age, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 34: Digital ads recalled within the past three months, by media consumed, 2021

DIGITAL AD ACTIVITY

- **Demographics impact ad exposure as well as attitudes** Figure 35: Age and income breakdown of digital ad activity survey respondents, 2021
- One third of email ad recipients have unsubscribed Figure 36: Email ad actions, 2021
- Nearly equal share of video ad respondents interacted with or skipped the video ad

Figure 37: Digital video ad actions, 2021

 Two in three pre-roll video viewers have skipped a videobased ad

Figure 38: Digital video ad actions, by video-based ads recalled within the past three months, 2021

- One in five made a purchase due to an audio ad Figure 39: Digital audio ad actions, 2021
- Podcast listeners more likely to skip or fast-forward through ads

Figure 40: Digital audio ad actions, 2021

PERCEPTIONS OF DIGITAL ADS

- Ad exposure influences perceptions
 Figure 41: Perceptions of digital ads, 2021
 Figure 42: Perceptions of digital ads, by those who recall digital ads over the past three months, 2021
- Social media ads perceived fairly positively compared to other digital ads

Figure 43: Perceptions of social media ads, by consumers who recall a social media ad within the past three months, 2021

- Email ads most likely to be considered a security risk Figure 44: Perceptions of email ads, by consumers who recall an email ad within the past three months, 2021
- Video streaming ads viewed more favorably than pre-roll video ads

Figure 45: Perceptions of video streaming ads, by consumers who recall a video streaming ad within the past three months, 2021

 Audio streaming ads less likely to stand out among audiobased ads

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 46: Perceptions of audio streaming ads, by consumers who recall an audio streaming ad within the past three months, 2021

- Pre-roll video ads widely considered a nuisance
 Figure 47: Perceptions of pre-roll video ads, by consumers
 who recall a pre-roll video ad within the past three months,
 2021
- Podcast ads present strong positive associations among listeners

Figure 48: Perceptions of podcast ads, by consumers who recall a podcast ad within the past three months, 2021

SHARING PERSONAL INFORMATION

- Consumers most comfortable sharing email with brands Figure 49: Personal information sharing, 2021
- Selling data is a major pain point for consumers Figure 50: Ways to increase comfort sharing personal information, 2021
- Millennials most comfortable sharing various types of personal information

Figure 51: Personal information sharing, by generation, 2021 Figure 52: Ways to increase comfort sharing personal information, by generation, 2021

• Black consumers most willing to share personal info Figure 53: Personal information sharing, by race and Hispanic origin, 2021

Figure 54: Ways to increase comfort sharing personal information, by race and Hispanic origin, 2021

ATTITUDES TOWARD DIGITAL ADVERTISING

- Consumers agree ads are necessary, but they don't like it Figure 55: Attitudes toward digital advertising – Auto-play ads, pre-roll ads, 2021
- Personalization and entertainment are winning themes for consumers

Figure 56: Attitudes toward digital advertising – Personalization and entertainment, 2021 Figure 57: Attitudes toward digital advertising – Personalization and entertainment, by age, 2021

 Social media is critical for new brands and local businesses
 Figure 58: Attitudes toward digital advertising – Social media and local/new businesses, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Mobile ads have a wider audience, but desktop can still execute on sales

Figure 59: Attitudes toward digital advertising – Smartphone ads, 2021

CONSUMER SEGMENTATION – ATTITUDES TOWARD DIGITAL ADVERTISING

• Four consumer segments identified based on attitudes toward digital advertising

Figure 60: Consumer segments of attitudes toward digital advertising, 2021

 Mainstream and Hyper Digital Users have highest digital media use

Figure 61: Media consumption in an average month, by consumer segments of attitudes toward digital advertising, 2021

Figure 62: Breakdown of number of media types consumed, by consumer segments, 2021

- Mainstream Digital Users (23%)
- Characteristics

Figure 63: Profile of Mainstream Digital Users, 2021

Opportunities

Figure 64: Digital video ad actions, by consumer segments of attitudes toward digital advertising, 2021

- Hyper Digital Users (27%)
- Characteristics

Figure 65: Profile of Hyper Digital Users, 2021

Opportunities

Figure 66: Attitudes toward digital advertising, by consumer segments of attitudes toward digital advertising, 2021 Figure 67: Video games played in the past three months, by consumer segments of attitudes toward digital advertising, 2021

Figure 68: Video game advertising, by consumer segments of attitudes toward digital advertising, 2021

- Ambivalent Users (28%)
- Characteristics

Figure 69: Profile of Ambivalent Users, 2021

- Opportunities
- Digital Ad Avoiders (22%)
- Characteristics

Figure 70: Profile of Digital Ad Avoiders, 2021

Opportunities

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
emea	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

MINTEL

Figure 71: Digital ads recalled within the past three months, by consumer segments of attitudes toward digital advertising, 2021

Figure 72: Email ad actions, by consumer segments of attitudes toward digital advertising, 2021

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

Figure 73: Total US sales and forecast of digital advertising revenues, at inflation adjusted prices, 2016-26 Figure 74: Total US sales and forecast of search advertising revenues, at inflation adjusted prices, 2016-26 Figure 75: Total US sales and forecast of display advertising revenues, at inflation adjusted prices, 2016-26 Figure 76: Total US sales and forecast of digital video advertising revenues, at inflation adjusted prices, 2016-26 Figure 77: Total US sales and forecast of other digital advertising revenues, at inflation adjusted prices, 2016-26 Figure 78: Breakout of US digital ad spend, by segment and year over year percentage change, 2016-21

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

store.mintel.com
+44 (0) 20 7606 4533
0800 095 9094
+1 (312) 943 5250
+86 (21) 6032 7300
+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **mintel.com.**