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Executive Summary

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Summary: SA360 strengths versus the competition

Overall, there aren't major gaps or differences in budgeting and planning features across platforms
- ○ Budget-planning functions were generally seen as well executed by users of all the platforms
- ○ Adoption of a platform is driven by the client/agency, price, level of customer support, amount of manual labor needed, and ability to integrate with client data

Strengths
- Being close to the dominant player in search
  - ○ Near real time updates in data
  - ○ Users report significant data lag time for Marin (~1 month)
- Innovation and reliability
  - ○ Marin has a legacy of success but is on the decline (lack of innovation); requires custom engineering work for any integrations
  - ○ Kenshoo seems to be the biggest competitor today, but has performance issues when dealing with large data sets
- Strong reputation in AI and ML
  - ○ Adobe also has a strong reputation, but requires buying into the full Adobe stack for full benefits of granular customer profiles and targeting
- Easy to understand UI and reporting
  - ○ Adobe's UI is not as user-friendly and templates are rigid

Summary: SA360 limitations versus the competition

Limitations

- Perceived bias that SA360's vested interest in increasing Google spend compromises its recommendations and bids
- Lack of support for social (e.g., campaign management); only Floodlight reporting, remarketing and attribution
- Lower level of customer service/support compared to competitors
- Lack of transparency on its algorithms and accuracy

Summary: SA360 versus the competition

Feature Areas

Ease of use

Performance

Modeling and forecasting

<u>Transparency</u>

<u>Incrementality testing</u>

Innovation

<u>Engine support</u>

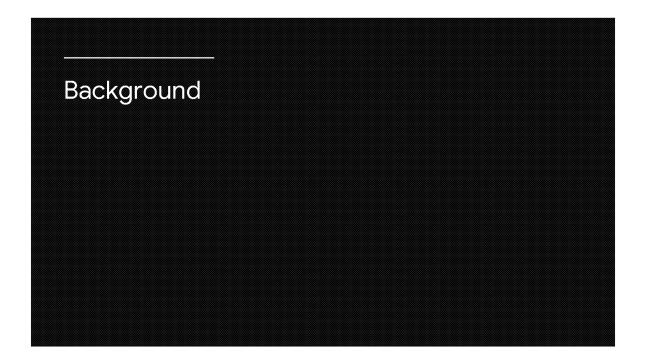<u>Social, Amazon, and e-commerce support</u>
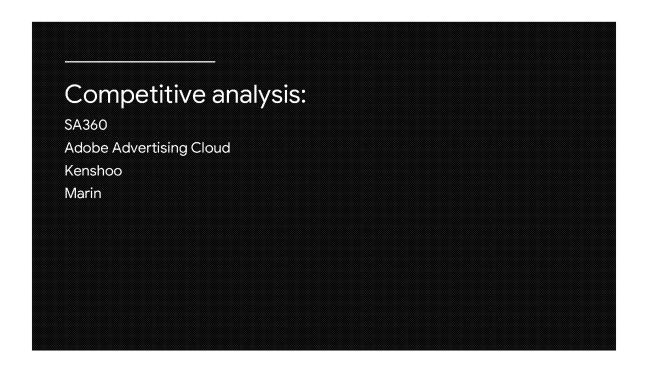
<u>Customer support</u>

<u>Data management</u>

<u>Measurement</u>

<u>Bidding strategies</u>

Background

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Competitive analysis:

SA360
Adobe Advertising Cloud
Kenshoo
Marin

Search Ads 360: Strengths

◆ Search Ads 360

- Integration with Google search and ecosystem
  - Benefits from association with Google Search and being close to the data; faster and better access to relevant data
  - When the lion's share of a search campaign will be on Google, users generally see less value in third-party platforms
  - Familiar UI to AdWords, with which most participants had experience
- Fast and easy to use interface
  - Easy to structure different campaigns
  - Easy to get started
  - Reporting is easy to understand
- Search attribution considered very strong
  - Accurate accounting of cross-engine conversion; other platforms may count a cross-engine interaction as multiple conversions
  - Ability to stitch data together across engines

- Strong reputation for machine learning and predictive ability
  - Useful tips provided to optimize performance
  - Long-time users have noted improvements to predictive ability
  - Ability to use Google data for forecasting and optimization at the start of a new campaign; other platforms need to lean on historic data more
- Existing relationships with many agencies
  - In an agency network environment, the likelihood is higher that all partners will be using Google as opposed to a third-party platform
- Ability to do bulk upload of campaigns across engines
- Quick to integrate new features
- Allows for pixel QA
  - Kenshoo does not

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Search Ads 360: Weaknesses

Search Ads 360

- Perceived bias in bidding and towards Google products
  - Sentiment that Google controls the bidding mechanism and the marketplace, so the bids are certain to be higher
  - Lack of transparency compared to competitors
- Customer support is inconsistent
  - Some felt the support was excellent, while others felt there was limited support
  - Automated-help tools were generally not valued.
- Tool is best for users who focus primarily on Google or transactional campaign goals
  - Some felt that this is a tool for those who heavily use Google; felt third-party platforms were better designed for multiple engines
  - Some users felt it has difficulty predicting against non-transactional goals (e.g., impressions)

- Not the highest quality of audience profiles and quality of conversions
  - Focus is on the conversion
  - Some users look at the "quality" of the conversion (e.g., repeated visitors)
- Can't do everything across platforms
  - Unable to directly manage social campaigns; social is limited to reporting
- Complicated to do bulk changes
- Expensive

Transactional campaigns are automated, time-sensitive campaigns that your users expect to receive while interacting with your brand through your app, website or POS. Such messages are usually triggered when a specific milestone or scenario occurs in a user's lifecycle. Transactional campaigns are focused on specific, action-oriented objectives and messaging (e.g., confirmations).

Adobe Advertising Cloud: Strengths

Adobe Advertising Cloud

- Comprehensive end-to-end platform
  - Key advantage is its ability to work with the full Adobe Suite to provide in-depth customer profiles and targeting
  - Very effective when conversions are not transactional
  - Integration with Adobe Analytics facilitates developing high-quality conversions, instant tagging, segment/audience activation and bidirectional data
- Uses Artificial Intelligence (*Sensei*) to customize and automate bidding
  - Users are confident in its AI and ML capabilities
- Users consider the platform to be driven by innovation
  - Has not had a presence in search as long as the competition but is attempting to provide unique service

- Strong reputation as a tool for the enterprise user
  - Adobe has a significant presence in the development of enterprise websites; this gives Adobe a foothold
- Alerts/flagging of metrics that throw off estimates
- Strong level of personal service

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