

2023 Consumer trends

& Zeropark's BFCM '22 data report





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A word of introduction

Emerging into the New Year is a perfect opportunity for all businesses to slow down, retrospect, and plan ahead. Every year, marketers, business strategists, and operational staff members from all across the globe face the task of creating a coherent set of actions for the next 12 months. One that will fit into the broader business development strategy, aided with optimal lead generation tactics, customer retention, marketing, and communication approach.

In a perfect world, these January conclusions would be set in stone and never unhinged. But as we move forward, the previously set goals and strategy require a bit of a reality check, some tweaks, and a few compromises.

Actionable insights and broader market trends come especially useful when trying to plan ahead or efficiently rectify your strategy, helping all sorts of businesses paint a bigger picture for their 2023 endeavors.

As an advertising technology platform connecting brands with consumers during the key moments of their shopping journey, **Zeropark pays very close attention to how modern consumers shop**, what are the best ways for brands to capture their target audience's attention, as well as how these audiences interact with online advertising and brand marketing, ultimately trying to uncover what drives them to make their final purchase decisions.



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Having been in the ad-tech space for over a decade, we genuinely believe in the power of collective knowledge, and we'd like to share our market observations and 2023 predictions with you.

The report you're about to read consists of the aggregated knowledge, insights, and findings from our Development, Business, Analytics, Compliance, Marketing, and Account Management teams. It's the fruit of countless hours of internal analysis, and thousands of emails and calls exchanged with our partners on both — the advertising and publishing side.

We hope these will help enrich your marketing endeavors, and in the long run, help communicate with your customers in the right places, at the right time.

This one is for an efficient 2023!
Kind regards,



Mateusz Drela
Managing Director





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Methodology

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The information and data available in this report have been gathered as a collective effort of all Zeropark teams and contain both internal statistics and external data from our trusted partners and sources. Every piece of external data has been verified and all sources are available for our readers to see and access.

For confidentiality reasons, we cannot fully disclose all of Zeropark's internal statistics. Please rest assured that the data presented in this report is fully reflected in our system. Zeropark team members are seasoned experts in the ad-tech industry, thus their observations and conclusions

come from a deep experience in the field. We witnessed many years and many trends as our teams monitor the industry on a daily basis. What is more important, the trends presented in the report fully resonate with Zeropark's business and market approach.



Bartosz Bielecki
Chief Marketing Officer





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Zeropark is an advertising technology platform providing advertising and monetization solutions for global brands and businesses. We drive scalable growth with proprietary technology and incremental audiences, ensuring full transparency, brand safety, and future-proof solutions for our partners.



Zeropark is a product of Codewise, an ad-tech company based in Kraków, Poland, responsible for creating innovative software for effective online advertising. Together we provide modern advertising solutions.

In 2020, Zeropark became a part of the CentralNic Group, a publicly listed company uniting providers of services in the domain industry and rapidly growing in the ad-tech space on a global scale.





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International communities

Zeropark has been recognized as a proud member of globally acknowledged advertising organizations, focused on supporting the development of innovative and compliant media services.



Recognized by



04

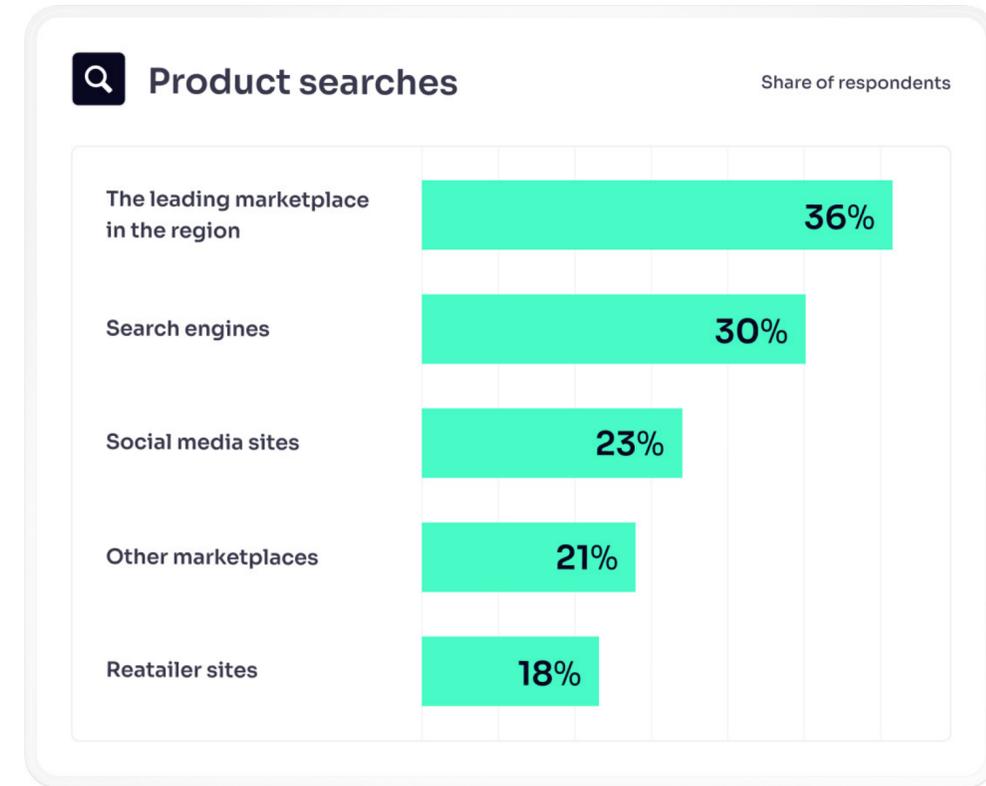
The shifting points of the shopping journey launch

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2023 will be the year of understanding your potential customers better than ever, ultimately revamping how brands, marketers, and agencies approach modern consumer behaviors and trends.

And although the communication itself may not change as much, given it's always a reflection of the brand's wider offering, the design of **where** and **how** it occurs may need to look very different this year.

The main observation, and really a starting point of any 2023 marketing and lead-capturing strategy should be that consumers are now better-than-ever-oriented about what services, placements, websites, applications, online aggregators, or marketplaces will help them filter and whisk out the best offers.



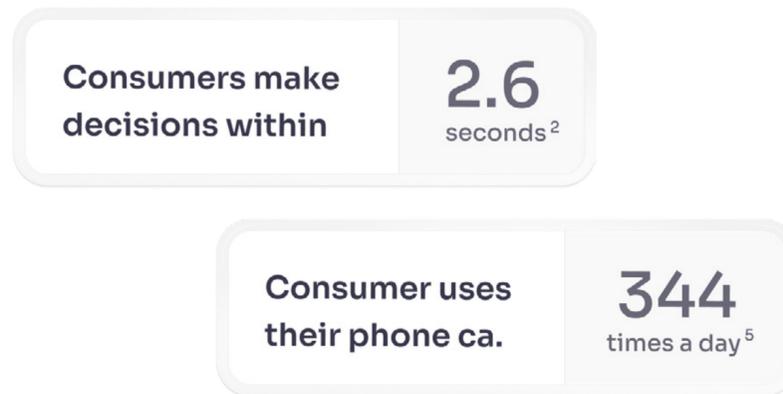
Where will 2023 consumers launch their product searches?
70% of online transactions are triggered outside of major search engines¹



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This sort of time and effort-saving approach on the consumer's part should come as no surprise given we're now living in a super fast-paced environment, where brands often have barely seconds to grab their audiences' attention² and serve them relevant content fast.

A good example could be vertical marketplaces or topic-specific platforms taking over broad search engines, where precise information wins modern consumers' hearts over the mass and often not too relevant content delivered by broad search engines. Quality over quantity is the *not-so-new* motto here.



And not to look too far when thinking about the best example to showcase that trend, let's think of the world's most visited travel-oriented website³. Booking.com noted more than 28% YoY increase in average organic visits in

2022⁴, proving that audiences are more than eager to encounter the right offers when expressing the desire to complete the purchase.

Understanding that mechanism can help brands find an efficient way of connecting with motivated consumers in the places they now go to, during the moment of the highest shopping intent, as well as gain visibility on the incremental channels that could have been otherwise overlooked.

Consumers no longer turn to the default search engines to do their shopping. **2023 shoppers know exactly where to find products they love**, as well as how to get the best offer for their needs. That's why Zeropark partners up with some of the most in-demand global platforms and brands, offering both incremental sources of motivated audiences and guaranteed growth for your platform.

Neill Burton

Director of Key Accounts



Part of CentralNic Group PLC



Embracing the messy middle

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Separating the signal from the noise

What we have previously known as a straight **idea-to-purchase** route of the shopping journey has now become a bit more complicated than that and has definitely made marketers' lives even more complicated.

With consumers spending more time and money online than ever before, marketers are now inundated with consumer signals that drive more confusion than provide clarity.

This is because consumers (and we mean every single visitor, even you and I, fellow marketer) will engage with online media differently. The modern consumer touchpoints are now so differentiated and occur with such a varied intensity that sometimes consumers have become hard to predict in their shopping behaviors, leaving the linear scheme and the classic sales funnel to be now forgotten.

Ultimately making the "messy middle" of the modern shopping journey messier than ever.

Fortunately, not all is lost for businesses looking to advertise to their target audience. To be frank, this opens plenty of new doors. Marketers are now able to detect the new touchpoints (or micro-moments) of the modern shopping journey, where **motivated shoppers can be met and introduced to your brand exactly where and when they need it the most**, allowing brands and marketers to **efficiently advertise to high-intent audiences**. It all happens on the incremental channels that more often than not were simply non-existent just over a decade ago.

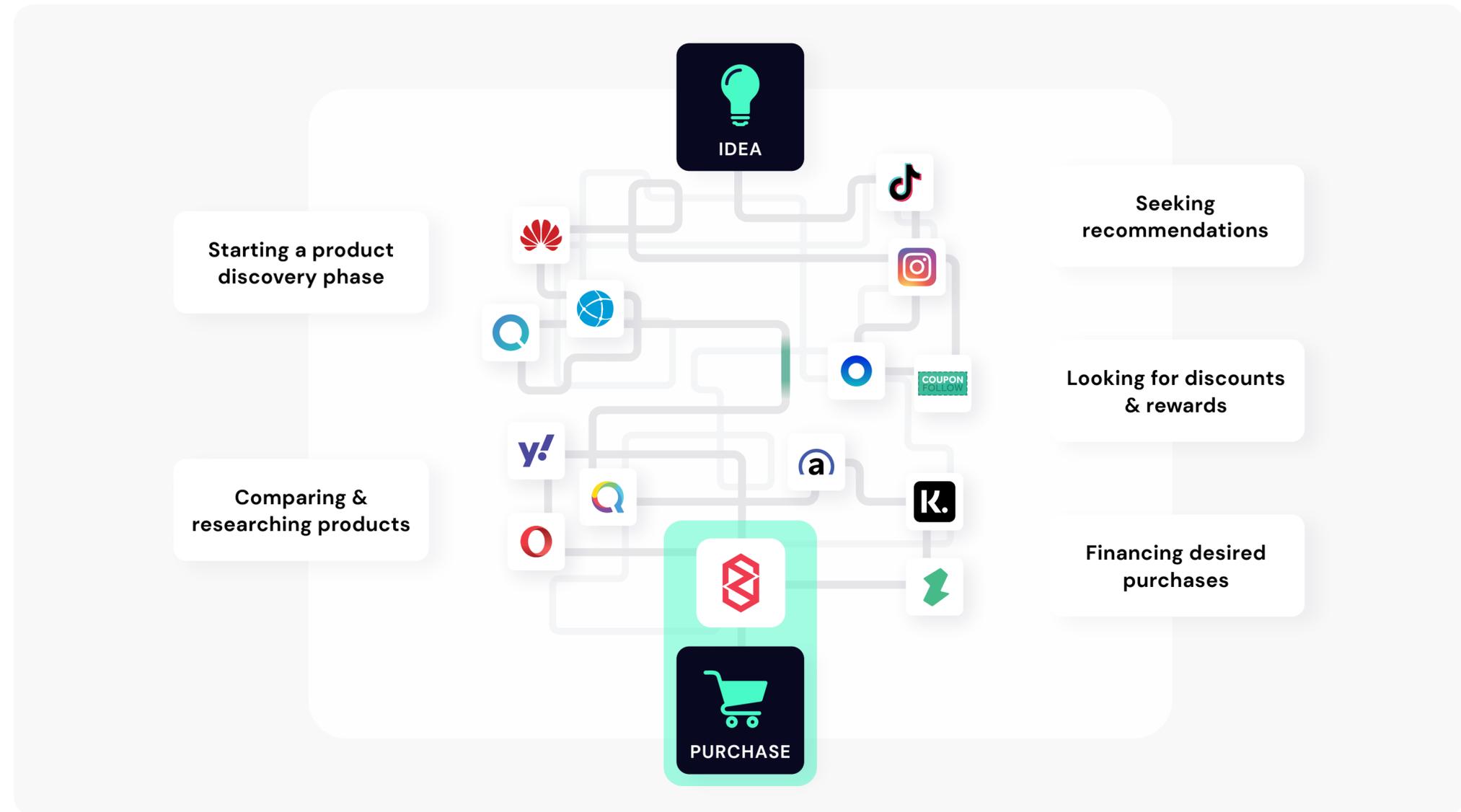
That's why, with the extremely short attention span of modern consumers, and the information overload we're all suffering from, the messaging and type of offered products need to be contextually relevant to the platform you're



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using as the channel of communication with your audience. Making meeting your consumers where they already are, and

answering their specific needs at the right time and place, a key focus for your 2023 advertising strategy.





The emergence of new platforms

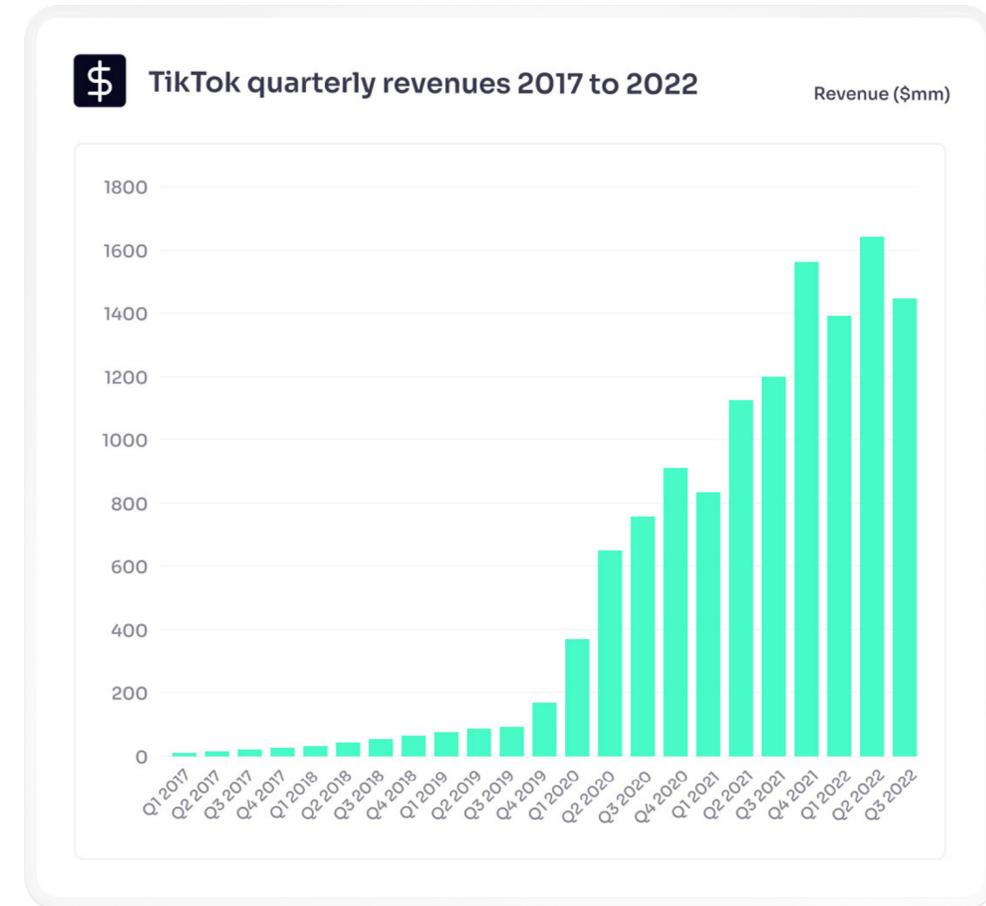
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Omnichannel presence for brands

When Internet was still in its infancy, users had no wide choice as to where they could potentially shop online. It was still a big shift from the pre-e-commerce times when one's location was the key indicator as to where the purchases would be completed. But in the 90s, big retailers, with Jeff Bezos launching Amazon at the forefront, started to quickly get traction of shopping platforms' popularity. It was a time when the first online megasellers gained their position, and with their immense popularity, immense revenues followed.

The likes of Amazon, AuctionWeb (now eBay), and others paved the way for modern retail, getting shoppers accustomed to the newly developed sales model. Over the years, shopping experience has significantly improved, with smooth transactions employed as the industry standard.

When the global lockdown caused people to stay at home, it



TikTok quarterly revenues 2017 to 2022 (\$mm)⁴²



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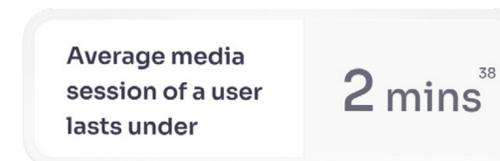
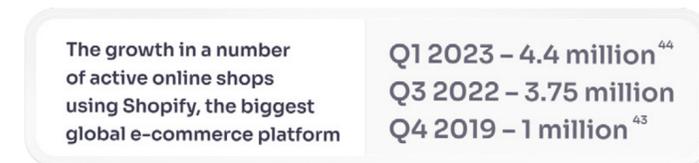
pretty much redeveloped out shopping behaviors. And because necessity is the mother of invention, various alternative solutions started to emerge, quickly gaining popularity among the modern consumer base.

Most interestingly, such platforms or services represent different characteristics and respond to different target audiences and their needs. With the likes of TikTok, Instagram shopping, smaller retailers, and widely appreciated Buy Now Pay Later, the audiences started to drift away from what they were accustomed to before. The platforms that would only be on the market for a few years or even months, would all of a sudden outdo the traditional online touchpoints in terms of performance, by offering modern and better-optimized experience.

Consumers need shoes? They go to Zappos, Zalando or directly to Nike and Addidas. Home decor? Bed, Bath & Beyond. Cosmetics & beauty products? Ulta or Sephora. Vacation? Kayak or Booking. Payments? Klarna or Affirm. The granular market is the obvious response to customer needs whether it's product discovery, market research, recommendations, offers comparison, or looking for financing solutions.

Additionally, market segmentation means that specific businesses are not exclusive, but they rather complement each other. Together, the retailers and service providers create this smooth, user-centric shopping experience streamlined to audience members individually and with the highest standards of care for their convenience.

This means brands need to focus their advertising on new and popular platforms, as this is where modern customers spend most of their shopping time. If marketers ignore that trend, they may easily miss out on an opportunity to communicate with motivated shopping audiences.





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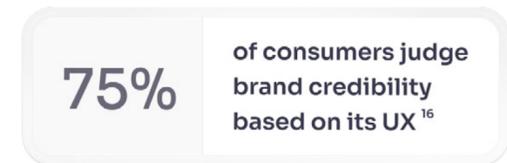
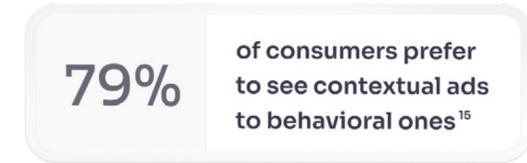
Contextuality over data collection

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It may seem obvious if we look at it from the customer's perspective, that the best advertising will be the one that fits our needs just right. But many marketers and advertisers really just do not embrace that, forcing intrusive and out-of-flow messaging.

It has been observed that although general shopper trends are predictable, it is now crucial to **flexibly answer the needs of granular audiences**. That is why conveying the universal narrative to the entire cafeteria of possible shoppers is no longer in favor. **Responsible contextual targeting, on the contrary, is.**

Instead of forcing brand content, marketers and advertisers are expected — almost required — to smartly answer the context of user expectations and consumer needs. The advertising needs to be a handy suggestion, or even an added value to the content present in the placement, no matter its characteristic.



Contextuality has been the **no. 1 priority** for our biggest advertisers, and it's not going to change. That is why we're constantly broadening our supply portfolio.

Rudolf Schubert

Business Development Director





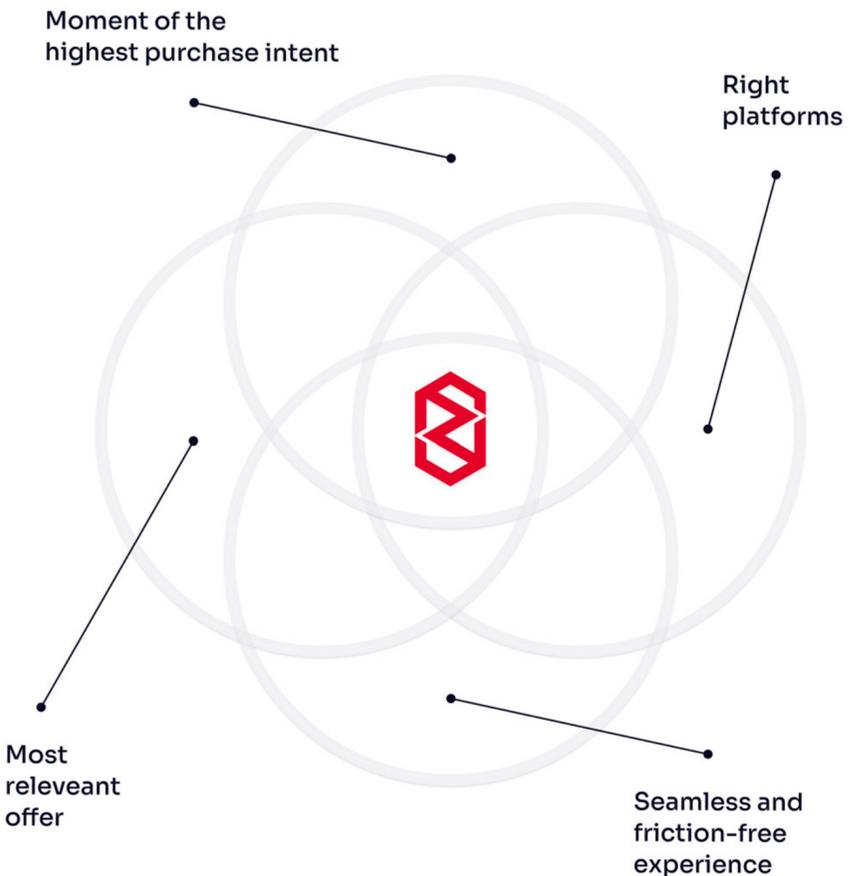
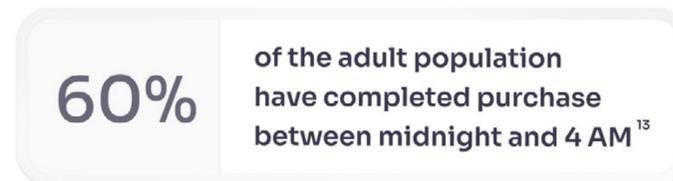
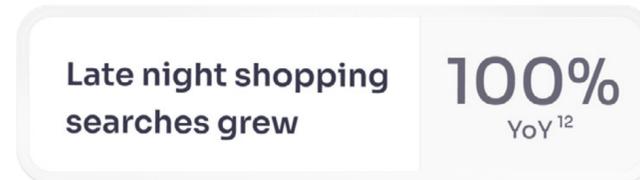
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We shop fast

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We've already mentioned that although the process of nurturing the customer is a long and complicated one, the actual spark that motivates the consumer to complete their purchase lasts only a brief moment. That's up to 2.6 seconds, to be precise.²

Tapping into this narrow time window is a difficult task, indeed. But there's one thing that makes it altogether much easier for brands and retailers.





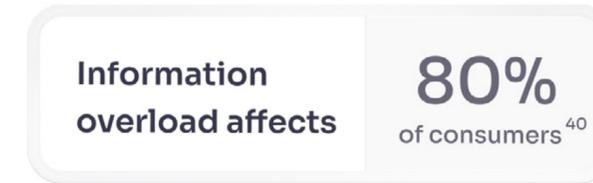
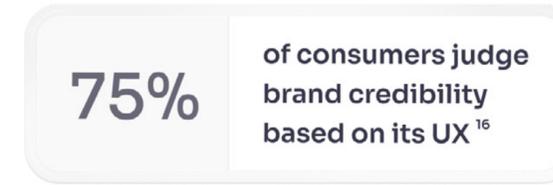
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We all want an efficient, friction-free, and seamless experience. No matter what we do, or where we do it. And we want it fast.

With the abundance of online advertising and information overload we're all suffering every day, modern consumers simply don't have the time or will to engage with irrelevant content.

That's why the key to success seems to lay with accommodating your consumers' needs with the right offer, served at the right time, in the right place... and in the right way.

Evoking positive brand experiences and catering to your target audience's needs lets brands win consumers'



attention over their competitors. Making the buying process altogether inviting, smooth, and easy for both parties involved – the seller, and the buyer. And with the employment of the newest online services for shoppers, the decision and purchase completion happens 'here and now' and is not delayed.



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Social media product searches

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The fact that **everyone** uses social media no longer needs any debating. But what is more interesting for the marketing world is that the outlook of SM advertising has been changing drastically.

We already noticed the shift from scruffy-looking, poorly targeted campaigns in social media into more complex and business-safe forms. And this is heavily reflected by how much the trust towards these ads has changed.

What the industry can be sure of is that there will soon be a power overtake when it comes to where the shoppers most often search for product information. Traditional SERPs are still leading, as of the end of 2022, but social media are catching up, having grown 14 pp. in just 7 years. It's only a matter of time before the tides change.

Actually, as GWI research says, for Gen Z representatives this is already the case, with the shift starting back in 2019. That is when SERP and social media numbers have evened out (each being the top choice for 49% of Gen Z).¹¹



The Incrementality of social media placements will only **become more appreciated** in the ad-tech industry.

Peter Misek

Business Development Director

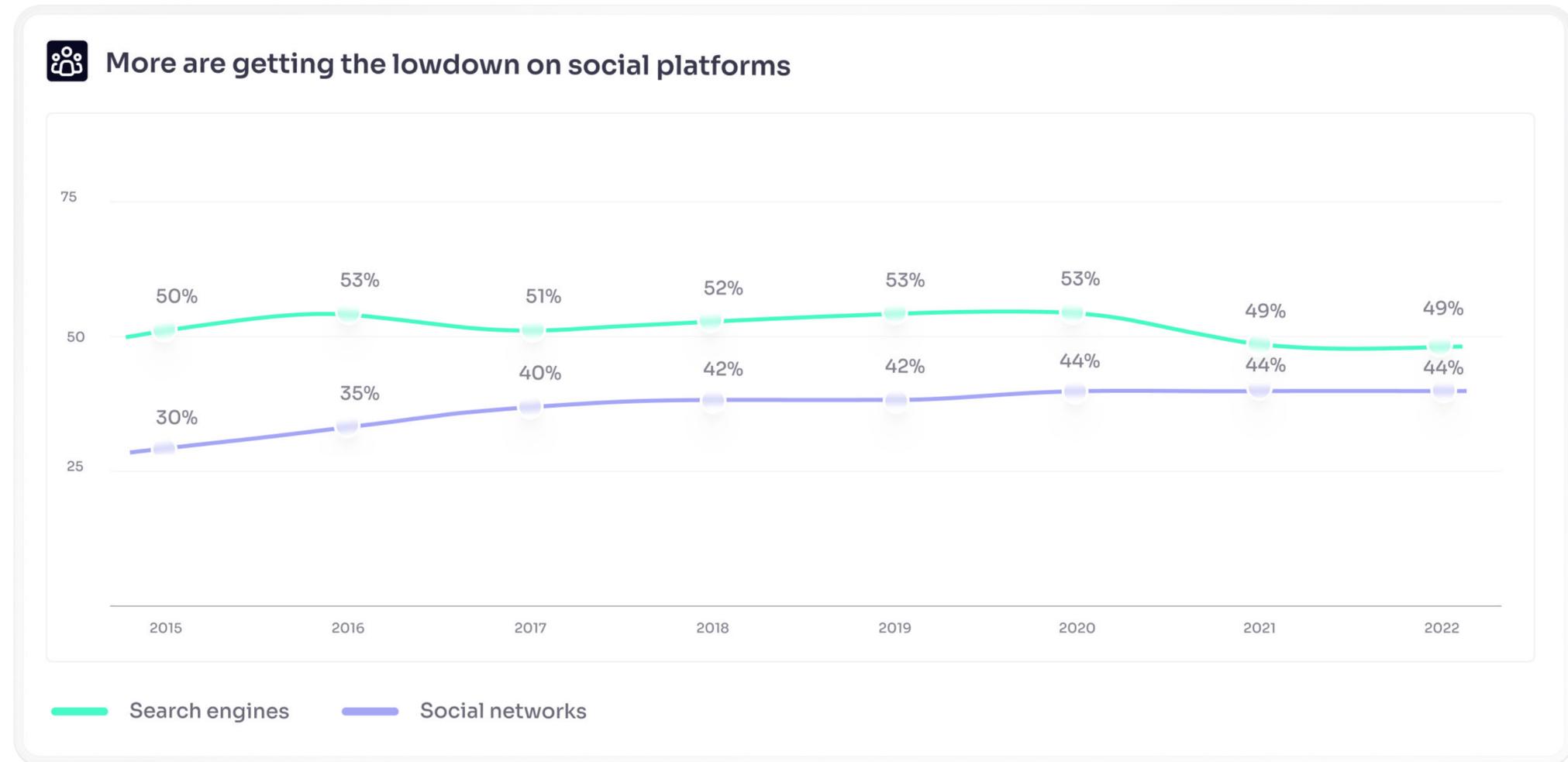




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It's heavily boosted by product and search optimization of major social media platforms, content monetization for influencers, and an increasingly growing market for brand

endorsements. In fact, cooperation with influencers not only provides the social proof aspect to brand advertising but also brings an incredible contextuality to the messaging!



Where customers find brand or product recommendations¹¹



Sales-facilitation services

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In the early days of the global lockdown, the global economy and sales facilitation services were forecasted to stop growing and suffer a significant slowdown.

Instead, ever since consumers got introduced to the likes of Buy Now Pay Later platforms, such and many other fin-tech solutions providers have noted impressive growth results.

To answer that trend, thousands of retailers joined the likes of top BNPL providers (e.g.: Klarna, Afterpay, or Affirm) with the global user base for such services growing to 360 million happy consumers in 2022. Given the current pace of the BNPL trend growth, it is forecasted to surpass 900 million users in 2027,⁷ meaning that almost 1 in 8 people on Earth will have become a Buy Now Pay Later customer by then.

Many vendors have already struck strategic partnerships with BNPL providers, offering low- or no-interest loans.



Allowing brands and retailers to help their customer base afford needed products right when they need them, while also helping buyers better manage their budgets. And given the financial recession dooming over modern consumers, such an approach is most definitely welcomed by many customers right now.

That's how, for millions of active shoppers, BNPL platforms have become their go-to place to seek products and best offers, enabling people to spend more conveniently,



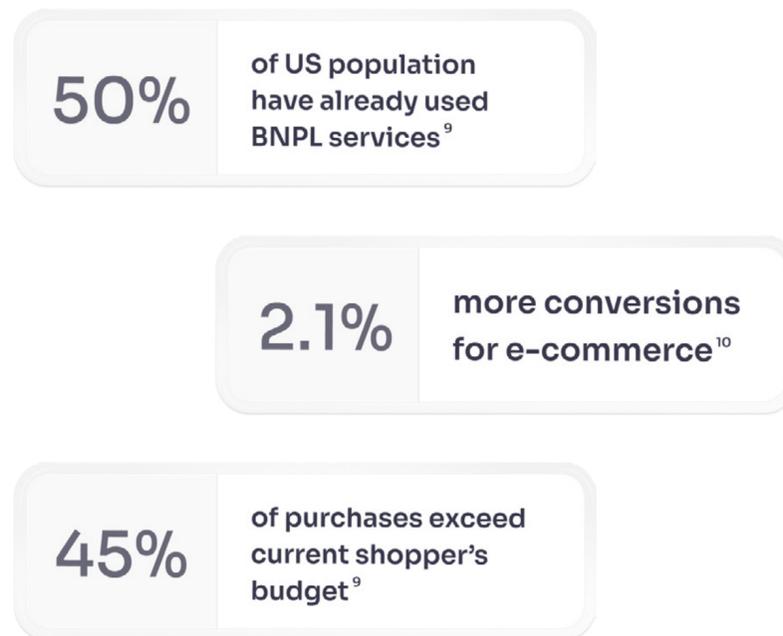
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ultimately leading to higher AOVs. Making that convenience and effortless shopping experience one of the key elements that turn visitors into shoppers, and ultimately, returning customers.

The BNPL brand placements are becoming more trusted and well-appreciated among modern consumers, with highly-motivated audiences entering such platforms and apps with the sole reason of finding great offers that answer

their shopping needs. That is why tech-giants like Google or Apple have already started working on their own sales facilitation products that could launch in 2023, expanding the customer base of BNPL services by hundreds of millions of shoppers.

Zeropark is a programmatic advertising partner to the biggest BNPL platforms, supplying our demand partners with highly-motivated and purchase-ready audiences. We're proud to say some of the best-performing campaigns in Zeropark have run with BNPL placements, allowing brands and marketers drive incremental performance to their businesses, and friction-free experience to their customer base.



Peter Misek

Business Development Director





Quality, not trumpery

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Consumers have been turning toward better quality products, even at the cost of higher prices for many years now. Nihil Novi. But it may be interesting for many marketers out there to see this trend reflected in search data. When Google first started analyzing the intensity of various search queries, they not only noticed the decrease in queries including the keyword 'cheap' but also observed its growing distance from the intensity of queries including the keyword 'best'.

This reflects the popularity of the trusted and industry-proven services and products, which are concentrated within the most popular placements — vertical searches, specific marketplaces, category applications, websites, etc. over little-known or generic brands.

That's why nurturing your customers and guiding them towards purchase completion across the many touchpoints

of the modern shopping journey, helping them get to know your brand, and evoking positive emotion with each interaction will not only drive new, high-intent audiences but also elevate the **Return On Ad Spend** and your brand's **Average Order Value**.

Over the years we have noticed that modern consumers are now increasingly expressing interest in **completing their purchases with trusted brands** or platforms after receiving positive experiences and well-tailored offer — even if ultimately it means spending more on the desired products or services.

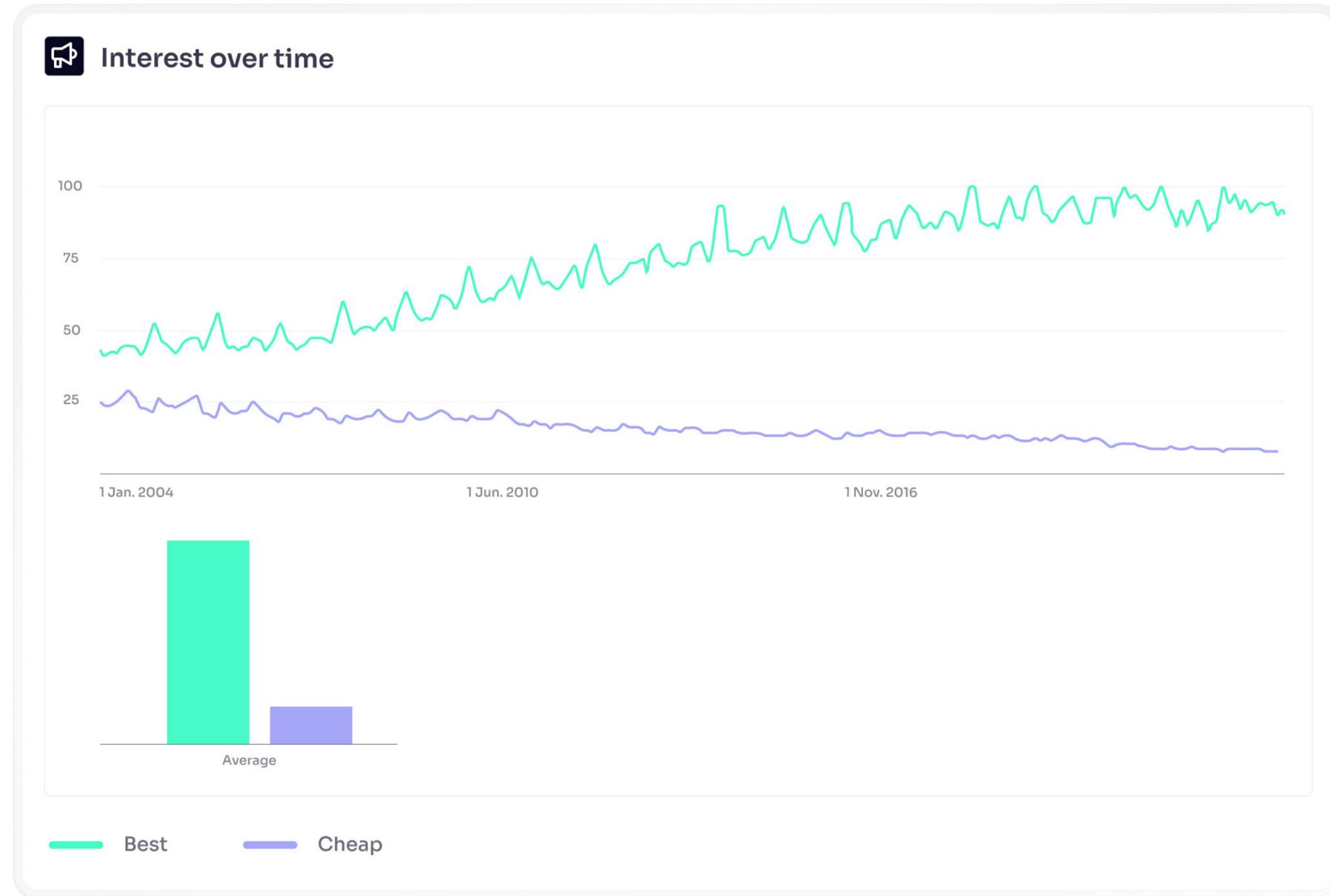
Jim Grace

Business Development Director, US





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Cheap vs Best
 The discrepancy between the global intensity of searches with 'best' and 'cheap' keywords has been growing since 2004.⁶



No borders for customers

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Although currently local businesses are very much back in fashion, global shoppers do not necessarily need to worry about things like geographical boundaries. All thanks to the shrinking of global trade, understandable policies, and impressive delivery times.

The quality of the offer, unification of online content, and high accessibility have opened a door for shopping abroad, and as the resources prove — global audiences are more than eager to take this chance.

This also comes with a surprising dose of understanding from customers. As the delivery distances are sometimes really impressive, slower delivery times are expected by 49% of US shoppers.

What is extremely important in cross-border shopping is language unification and localization. Accessibility of

automatic page translations proves to boost international sales. Simply, customers will gladly complete the purchase if only they are able to read the offer in their native language — as 62% of US shoppers are unlikely to buy products that are not described in English.¹⁴



We have noticed a **better global distribution** of audiences — meaning that brand marketers are no longer in need of restraint to just their native GEO.

Jim Grace

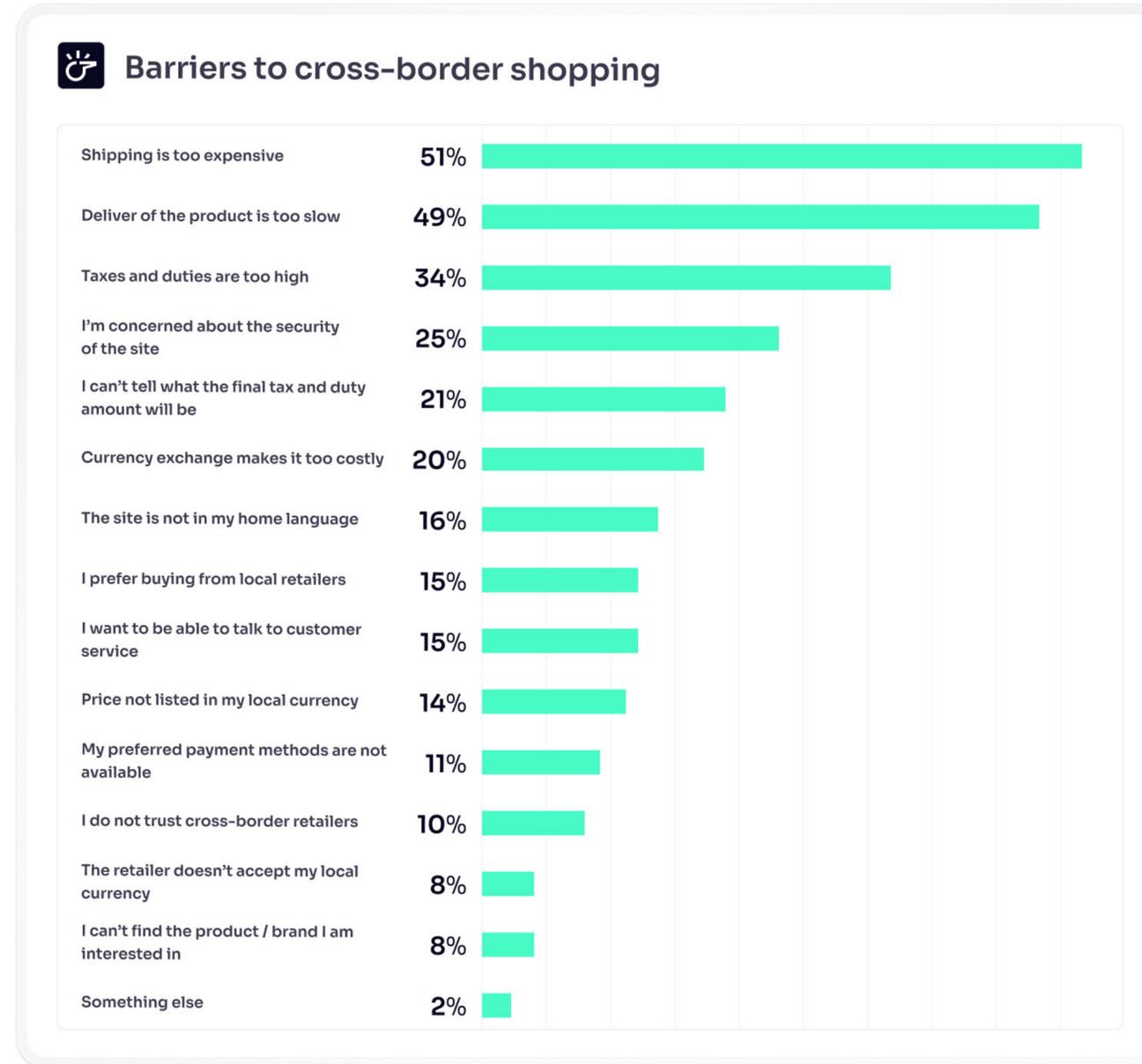
Business Development Director, US



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Barriers to cross-border shopping¹⁴



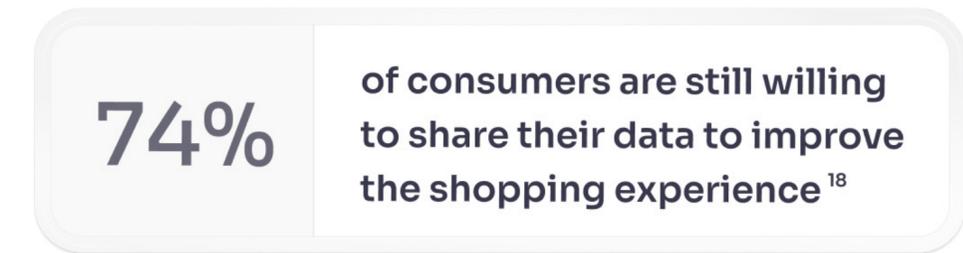
Baking the new privacy standards

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Year after year the Internet becomes a safer place, and the times of the wild west in user data handling are officially over. We have been witnessing the slow death of cookies, and it is only one of the first steps toward third-party data removal.

The encouraging thing is that the initiative comes from the roots, as the global online privacy awareness indicators have skyrocketed in the past decades. And the officials and C-suits of online services and platforms followed in order to keep up with the consumer.

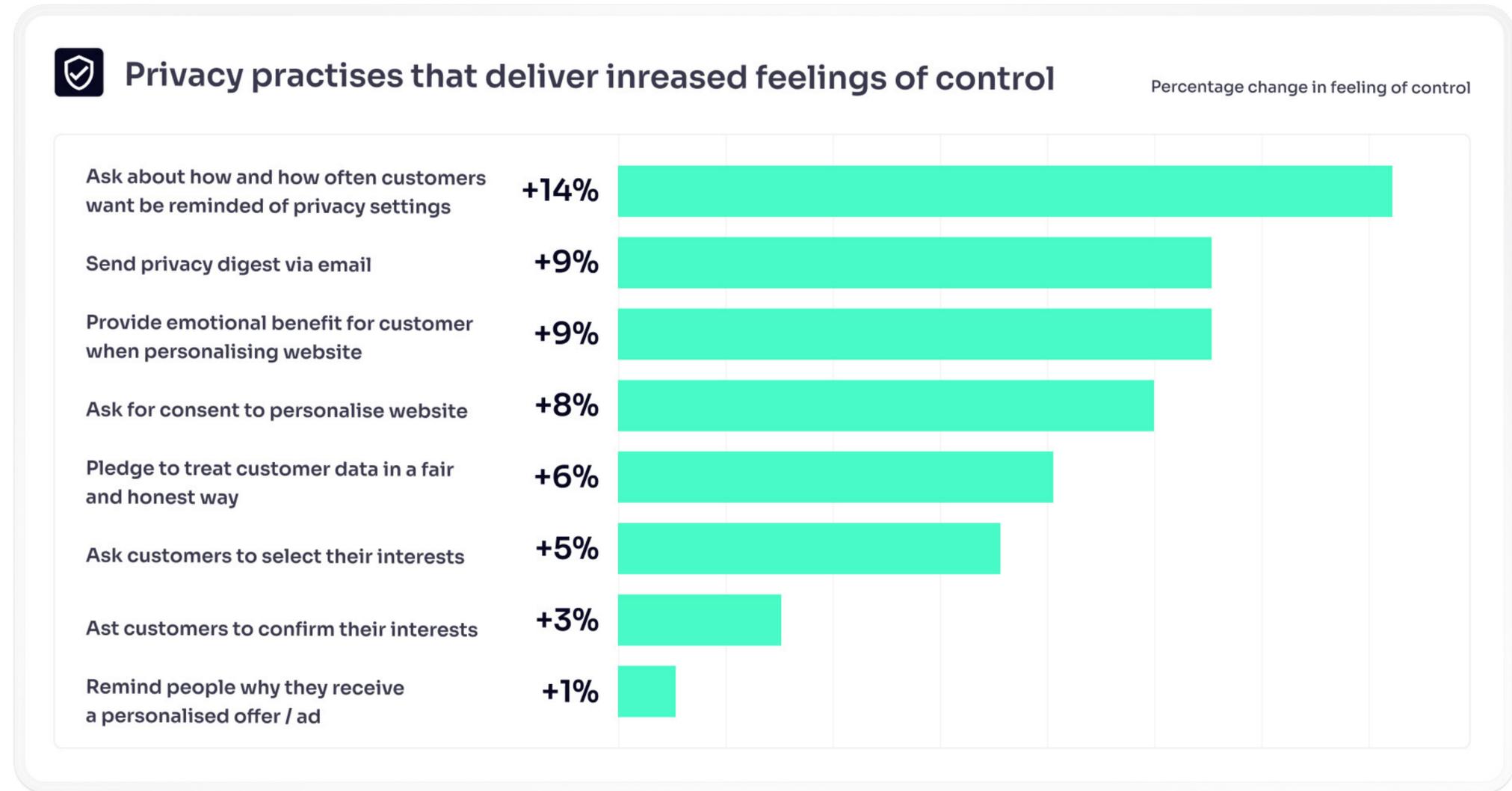
In 2023 brands will need to embrace these new standards, as the lack of cookies is no longer a 'nice-to-have' feature. It is often the key argument for choosing a brand to complete a purchase with, and digital maturity is now expected.



Shoppers are focused on being served in a modern, cookieless manner. The more in control of their privacy consumers feel, the more they are likely to stay with the brand — it touches upon your programmatic advertising, too!



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What gives customers increased feeling of control over privacy¹⁷

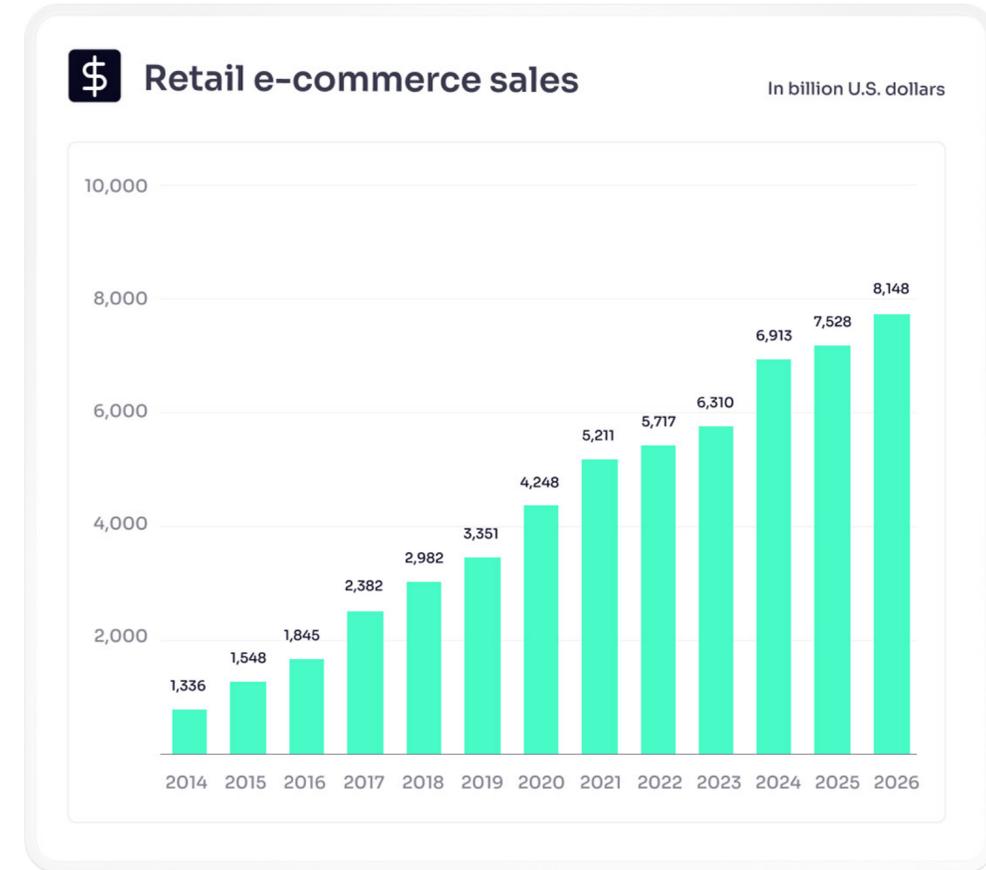


Financial insecurity paradox

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Unsurprisingly, in times of global uncertainty, inflation, energy, and climate crisis, consumers have become more insecure over their financial situation. We are no experts on global politics, economy, and healthcare, but the estimations claim that 2023 might be better, and we stick to that. It does not change the fact that as much as 51% of Americans believe that the economy's state is going to worsen, while the tax insecurity indicator grew from 36% in Q1 2021 to 40% in Q2 2022.¹¹

And the basic logic would suggest that the recession would cause people to spend less, and maybe withdraw from consumerism. But paradoxically, consumers have never started to withhold from purchases as global e-commerce is constantly on the rise. And it is forecasted to grow by another 10% in 2023, after a similar 2022 growth.¹⁹



Retail e-commerce sales¹⁹

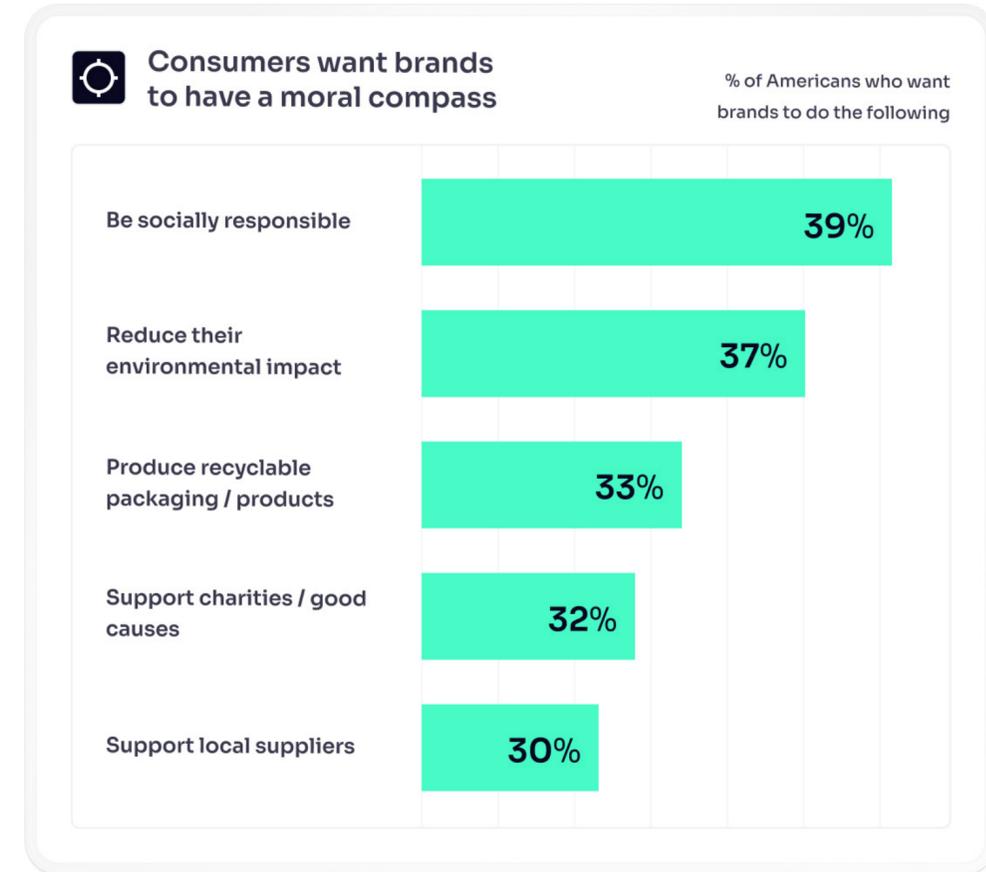


Fancy messaging fatigue

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There always comes a breaking point, and it seems like we hit it in terms of over-thoughtful brand narratives. After years of being bombed with, undoubtedly pressing, global issues — economic, social, and environmental — at every corner, it seems like shoppers have had enough.

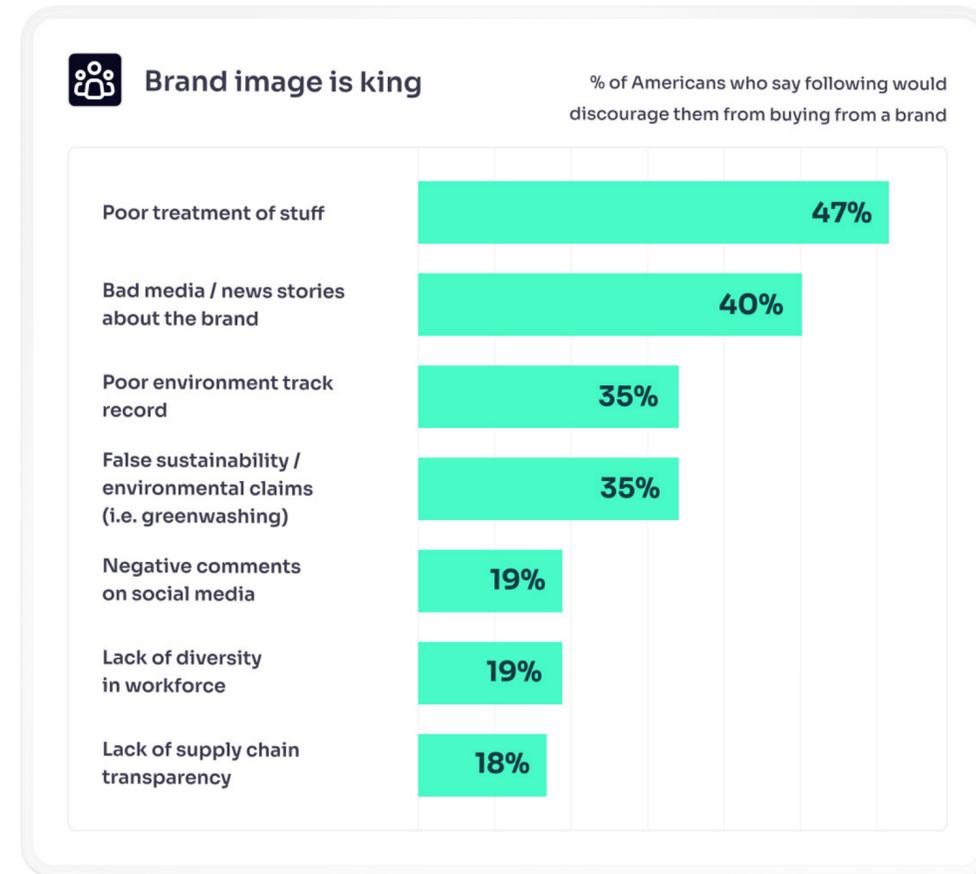
Actually, customers have expressed growing fatigue over fancy and official messaging in advertising. And although the support for pressing issues is not falling or whatsoever, there is a growing lack of trust towards companies that engage with these.



What Americans expect from the brand¹¹



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What discourages Americans from buying from a brand¹¹

In fact, 35% of Americans claim that 'greenwashing' and false sustainability discourage them from engaging with offers or brands. For some, the omnipresence of oppression and dooming narratives in brand and marketing communication may be simply too overwhelming. That is why practicality and pragmatism are becoming more in favor. To put it simply, less is more.

This trend is a particular one, as it really puts the need to be considerate into the highlight. Brand marketers should of course always have in mind that some lines are uncrossable, but moderation is a virtue, too.



Purchase through trust

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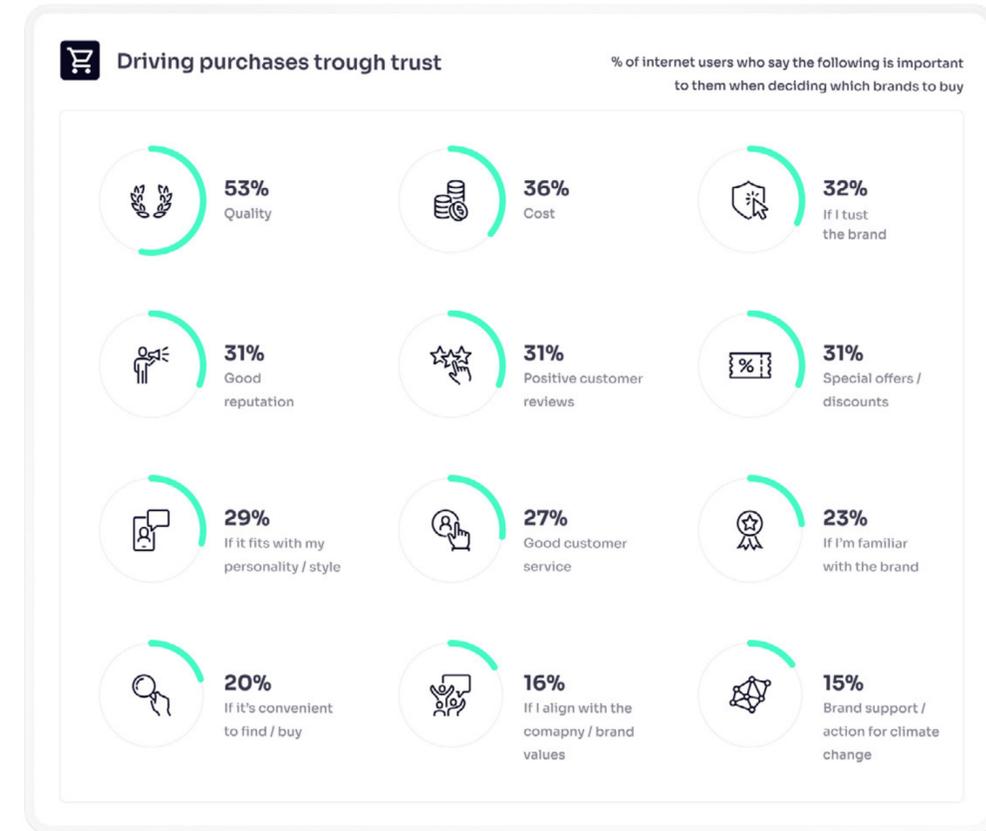
This brings us to the place, where the topic of brand image and trust needs to be tackled. This is because customers tend to be more likely to finalize their orders with companies that they have a connection with. It's one of the simplest mechanisms embedded in the human mind — we like things that we already know and can trust.

And although building credibility and a positive brand image in every industry can be a bumpy road, as many have painfully experienced, maintaining a satisfactory level of social reliance is a difficult task.

2022 GWI market insights suggest that for global audiences still, the biggest factor to consider while completing the purchase is the quality of the offer (53% of Internet users), price (36%), brand trust (32%), and reputation (31%).¹¹

Notice how discounts, familiarity, company values, and social

activism are all important, but less stressed than the above indicators.



What is important for internet users when deciding on brands to buy from¹¹

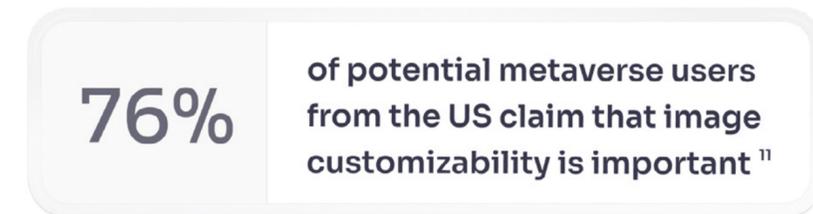
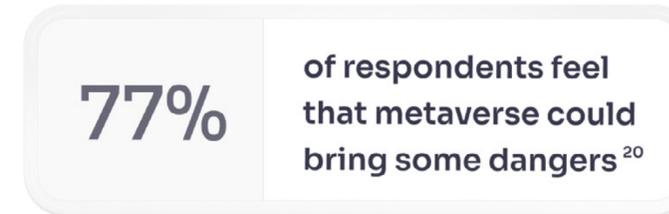


We don't trust Web3 but we still use it

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It's hard not to remember the times when NFTs, cryptocurrencies, and blockchain-based businesses – metaverse, in general – were the new, exciting projects. The online communities were buzzing, and the discussions about it seemed to be neverending, as the topic has many advocates and skeptics. Nowadays, the general enthusiasm seems to have thawed a bit, as the metaverse still remains a concept only.

Conceptually many still have a hard time wrapping their heads around the whole Web3 thing. And as a society can be fueled with promises for a limited time only, Internet users of all ages seem to be expressing more and more doubts about it.



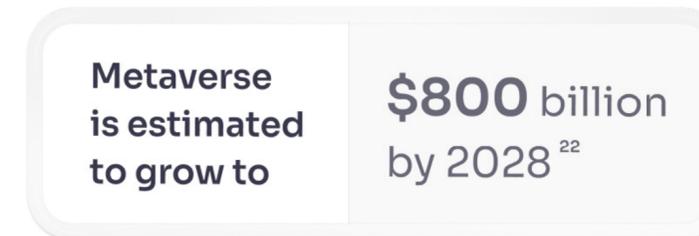
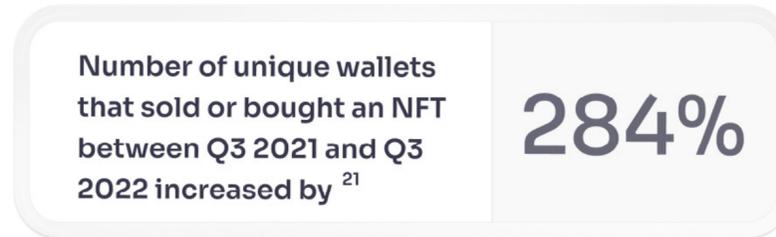


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But this does not mean that these businesses are not growing.

And it does not mean that the tech employed stopped developing.

Although we noticed a major slowdown in Q3 and Q4, 2022 generally brought impressive growth to the industry. And it's important to mention how the blockchain helped develop better gamification and online brand identity-building strategies.





AI is conquering people's hearts

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What was quite interesting for worldwide spectators in the last quarter of 2022 was the sudden explosion of AI popularity. The market was flooded with effective and accessible tools like ChatGPT (the interactive text AI) or DALL-E (the prompt-based image generator), both stealing users' hearts and raising questions about human efficiency in many professions.

AI solutions are becoming the "hot thing" again. But this time it's justified and not based on promises — but rather on visible performance. Of course, the AI and ML (machine learning) inventions may still need a human touch to be truly believable, but it is already that major content creation companies are using AI solutions extensively.

The market for artificial intelligence is said to have reached \$5.5 billion in 2022, but the predictions claim it should quadruple by 2030.³⁰

The consumers seem to be approaching the AI with caution, but a growing trust as well. Even despite the fact that 69% of college graduates believe their positions could be made irrelevant by introducing AI in the next years,³¹ 70% of respondents either fully trust artificial intelligence or accept it.³²

All this is what the regular consumer means and comprehends, but the truth is that there is much more happening in terms of AI and ML use behind the scenes. Automated solutions, data comprehension, and analysis are now widely employed to support the customer experience online. With solutions instantly assessing every request and learning new patterns, the customer is now given pinpoint offers without delays. AI brings increased contextuality to the table, too. It allows more efficient advertising, and by that (by addressing the messy middle-based search for products), allows



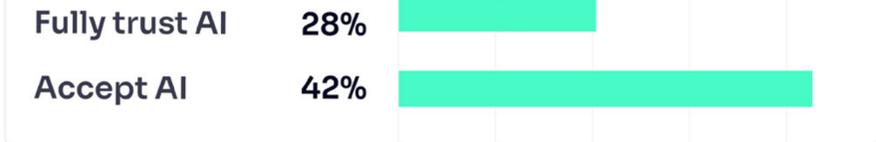
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companies to be there for their customers in the right offers and with perfect timing. It's seamless and the customer does not even need to know that they just used an AI-based feature.

Even back in 2017, when the solutions were much further from perfection, 63% of online users were not aware of the fact that they were already using AI-based technology.³⁴ In 2023, when the processes are even better optimized and flawless, the employment of Artificial Intelligence is less obvious, better-serving marketers and businesses without disrupting the ever-precious user experience.

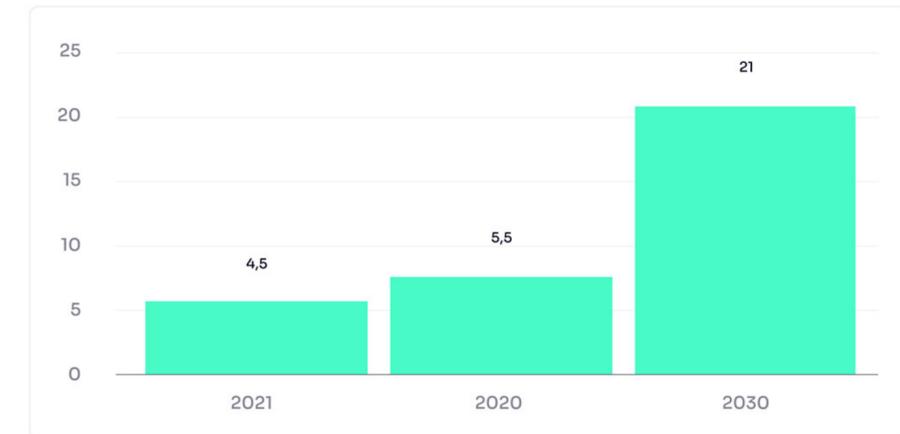
On top of that, the increasing facilitation of creating and launching marketing campaigns, also partially thanks to AI implementation, means that the manpower saved could be used to diversify the lead- and sales-generation channels. That is because creating a net of omnichannel communication and targeting is yet another trend in marketing that will definitely define 2023.

 **Trust rate towards AI solution**



Trust rate towards AI solution³²

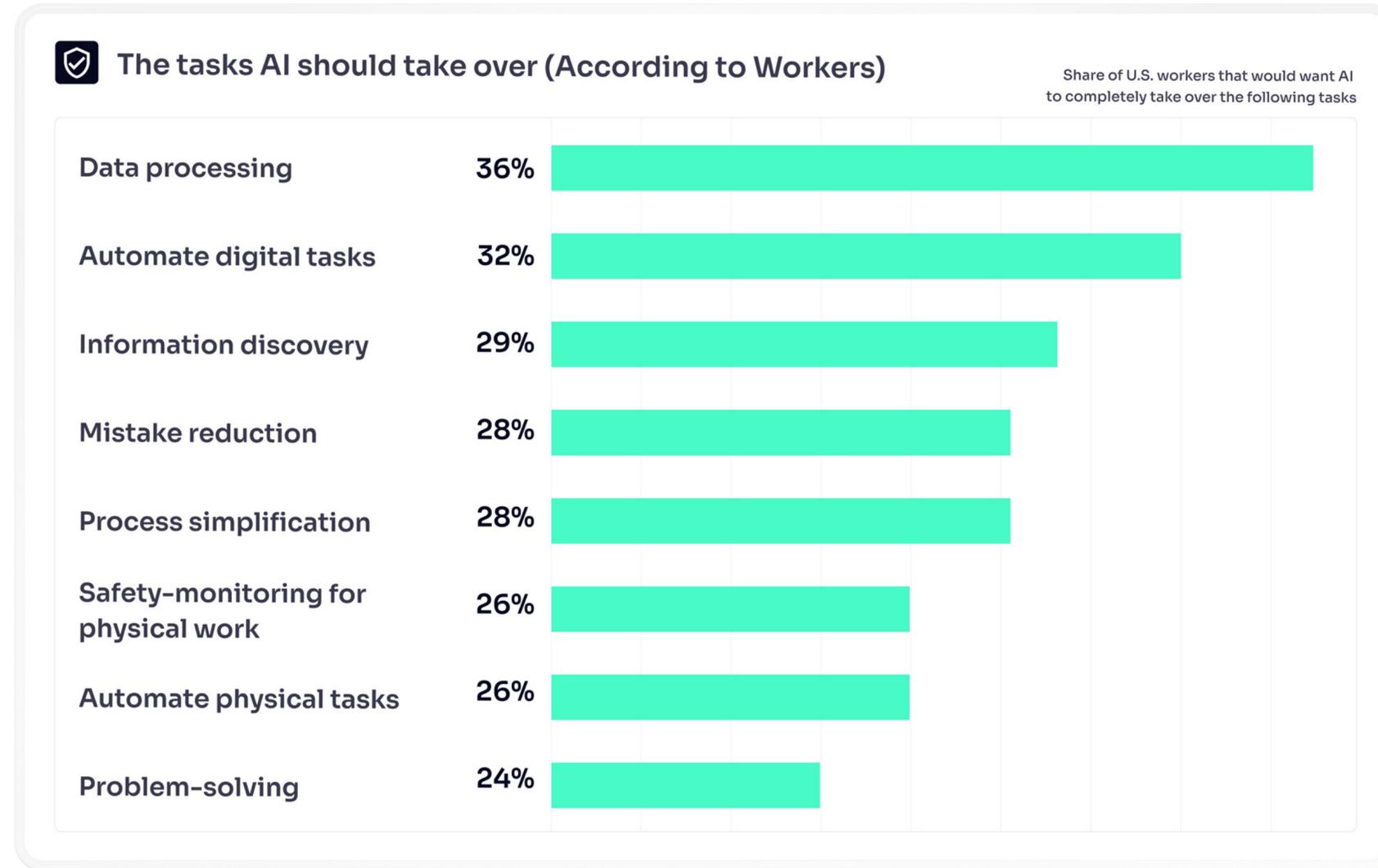
 **Size of explainable artificial intelligence (AI)market worldwide from 2021 to 2030** In billion U.S. dollars



Size of worldwide explainable AI market³⁰



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What tasks should AI take over? (by U.S. workers)³³



App application

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2023 will be the year of rediscovering mobile applications, as the shift from mainstream search engine solutions has also become visible in the app stores. In search of new, more efficient, and customizable solutions, customers have started appreciating the freedom of applications again. And the new privacy standards allow them to fully embrace their data protection!

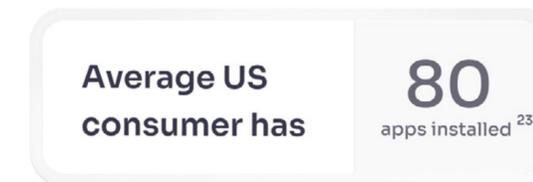
Apps of all kinds have become the perfect response to what the audiences expect from brands and offer aggregators:

- Search customizability
- Privacy standards
- Contextuality of offers
- Always being up-to-date
- Handiness
- Pleasant experience with modern UI²⁴

Retention rate by application type²³

Type of Mobile Apps	30 Day Retention Rate	60 Day Retention Days	90 Day Retention Rate
Media & Entertainment	37%	27%	22%
Ecommerce & Retail	39%	27%	22%
Travel & Lifestyle	38%	28%	23%
Business & Technology	34%	23%	17%
Social Networking	30%	20%	16%

As we stressed before, 2023 consumer likes to complete purchases on special offers, and an application gives them the freedom to do so freely. It also allows brands to build a dedicated community and gamify the shopping experience.





Rise of subscriptions

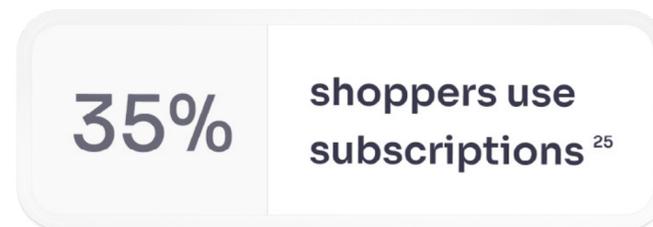
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Pay closer attention to the opportunities brought to e-commerce by the subscription features. It may be that the video streaming services had us accustomed to the idea of seamless, monthly automatic payments for a service. But truth be told, it does not seem to be a problem — more of a convenience for 2023 customers.

It has been implemented in standard product commerce long ago, but in 2023, the subscription model seems to be the ultimate form of brand commitment. It takes the

ordering process off the customers' shoulders and brings more automation to weekly/monthly/quarterly/yearly shopping.

So while it's perceived as comfortable for customers, it also drives steady revenue for the company. On top of that, it builds trust and brand image, solidifying the company's position in the market.





2023 will be boring, but in a good way

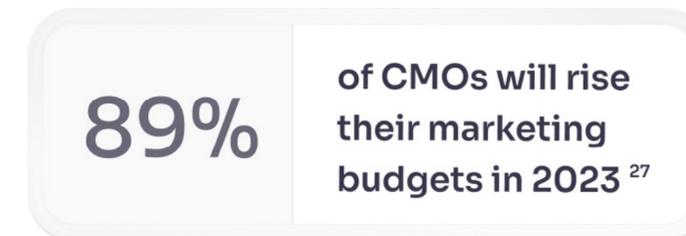
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It seems like, after a long waiting period, 2023 will finally be a standard, predictable, boring year. And that is the most significant news any marketer could hear after bumpy 2020, 2021, and 2022. These not only disrupted how the whole planet and our everyday looked — but the last three years also heavily influenced the smoothness of advertising budgets and planning. At last, the market outlook is that we could possibly be facing normality in the industry.

This means that you will finally have time to get prepared to finalize your campaigns without fear of unpredictable events that could shake the whole Earth and every possible

market. Also, most possibly, the standard seasonality will be applicable to 2023, so that is a perfect opportunity to catch some stability that most professionals lacked in 2022.

Get budgets ready for the intense Black Friday & Cyber Monday period, Christmas, Thanksgiving, and all the

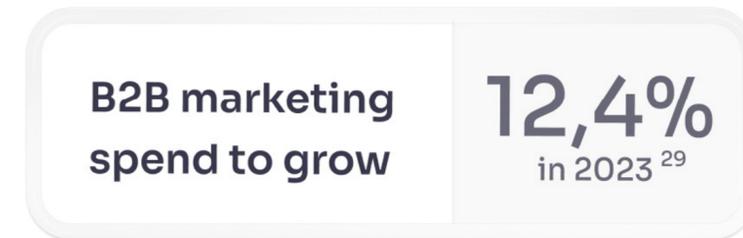
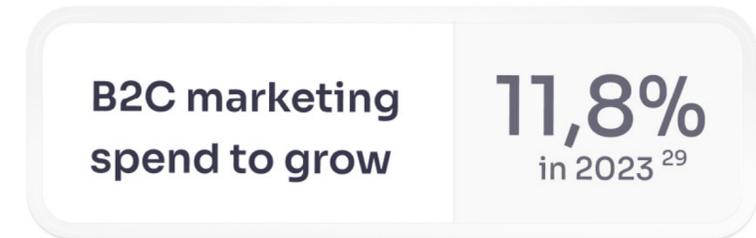




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occasions where you can see increased demand and spending. It's important to approach these dates wisely, and never forget to have proper preparation periods.

With more tranquility in global markets, the budgeting process should be more stable, but so will the customer spending. As we seem to be emerging from recession (slowly, but steadily), consumers will be more eager to spend more. So if only your marketing is planned, financed, and optimized well, you'll be happy to see increased AOV and elevated conversion rates.





Zeropark internal BFCM '22 data report

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About

The Black Friday and Cyber Monday weekend is probably the most anticipated one throughout the year for all types of brands and marketers.

We can say that it's the essence of what Q4 is all about in the advertising technology and e-commerce industries — shopping big. And since we're on the topics of BFCM, the whole Zeropark Team is proud to announce that the 2022 Black Friday was a record one not only for our platform, but also for our supply and demand side partners.

Zeropark teams worked hard to prepare for the whole Q4 shopping season in general, and seeing how the year-long process boiled down to seeing tremendous and efficient results, makes us very proud. With major upgrades to the Zeropark platform, even tighter than usual security and

compliance processes, as well as new extensions to already tried-and-tested solutions, Zeropark clients could manage and optimize their campaigns even better, ultimately delivering incremental performance to their businesses. None of this would of course be possible without close cooperation with designated Account Managers, which proved to be fruitful to Zeropark clients, with the achieved ROAS and available audience exceeding all expectations.

This puts us in a position to plan an even better 2023. Below you will find some of the data we extrapolated from 2022 Black Friday & Cyber Monday weeked to see how our solutions help brands grow and reach incremental earnings.



Sasha Gerasimenko
Head of Business Operations





Sample brand volumes during 2022 BFCM

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Compared to a standard Q3 week

Brand	2022 BFCM Volumes	% volume change compared to Q3 week	% audiences won compared to Q3 week
BestBuy	46,670	797%	217%
Walmart	1,012,279	292%	174%
Dell	11,734	1016%	174%
HomeDepot	78,530	396%	203%
Lowe's	80,374	169%	143%
Amazon	1,226,595	268%	264%
Maurice's	30,753	1814%	1462%
Warby Parker	6,240	154%	122%
Saks Fifth Avenue	10,770	1577%	504%
DSW	38,229	334%	321%
WebstaurantStore	40,233	128%	123%
Venus	57,443	633%	701%

Above, you can see how the available audience audience for Zeropark users changed per brand during the 2022 Black Friday – Cyber Monday week. The statistics are compared to a corresponding (duration) week that was randomly chosen from the Q3 period.

Not only Zeropark accessed a wider range of audiences corresponding with chosen brands but also offered great performance to our clients. In the far right column, you can observe how the efficiency of campaigns skyrocketed during the 2022 BFCM week compared to a randomly chosen Q3 week.



2022 BFCM campaign performance

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Let us present a sample of campaigns that were run in Zeropark during the 2022 Black Friday – Cyber Monday period. We have chosen a variety of placements and niches to show the scope of brand-safe campaigns in Zeropark.



Great performance of these and impressive ROAS was achieved by accessing contextually-relevant placements and targeting the most intentful audiences.

Brand	Placement	Country	Sales	CR	AOV	ROAS
Retail (baby supplies)	BNPL	US	2,070.00	24.73%	\$235.81	23
Retail (sports gear)	Coupon	US	272.00	19.12%	\$2,926.03	56
Home & garden tools	Huawei	PT	16,687.00	1.49%	\$164.52	70
Retail (home decor)	Mail	US	11,154.00	15.43%	\$275.50	32
Retail (fashion)	Search Engine Tiles	US	3,089.00	7.83%	\$83.58	24



Fashion campaign scale-up case study

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To have a full overview of how Zeropark campaigns function throughout the BFCM period it will be best to compare the granular performance of these to some other week, unrelated to the high shopping season. That is why we're presenting you with a deep dive into one of the US campaigns that scaled up during BFCM weekend, attracted audiences more swiftly, and drove efficient sales toward the offer.

The campaign focused on Zeropark incremental Buy Now Pay Later placements, and targeted the audiences with an offer for a clothing brand's catalog. It was launched a few weeks prior to the BFCM period, and the two periods compared in these materials concern the same configuration on the same campaign. The only difference is the date, and during the BFCM week, Zeropark partner saw that:

The number of available consumers grew by	The cost of reaching a single consumer was raised only by	Share of available audiences that the campaign won grew by
221%	3%	+0.15 percentage points

What is important both for Zeropark and our demand partner, is the fact that with a maintained share of placements won (fluctuating by as little as 0.15 pp. between the compared periods), and only slightly adjusting the bid, campaign's performance skyrocketed due to the available Zeropark supply. It is brilliant news given the fact that BFCM usually means that reaching your audience gets more difficult as the markets become more competitive. Thanks to the Zeropark team's aid, our partner got to reach a motivated audience and generated sales while... managing to avoid loss and overpaying for the said placements.

A 3% increase in the price of reaching one customer proved to be the key to maintaining a good win rate from before the BFCM. With that kind of well-prepared environment, incremental **Zeropark solutions brought more than twice the amount of shoppers to the brand** during the crucial part of the shopping season, boosting the overall sales and revenue brought to the advertiser.



Key Takeaways

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- Modern customers make more stops, and for shorter periods of time while browsing the Internet.
- Brands need to become visible in multiple placements to answer their audience's purchase needs and approach them during the disconnected experience in the most shoppable moments.
- The new inspiration-to-purchase path is now messy and unpredictable. Marketers need to understand the different stages of the tangled shopping journey to approach customers in the best possible way.
- The more embedded in the context the offer is, the more plausible the purchase. Matching the user intent will be the key indicator of 2023 performance marketing.
- User attention is so fleeting, that the messaging needs to be conveyed and executed in the right placements, at the right time, and with the right purchase intent already present.
- It is really worth noting that social media has been becoming increasingly important during the exploration, discovery, and financing phases of the shopping journey. In the near future, it will overtake search engines as their go-to product recommendation place.
- In order to feel more secure during online shopping, modern users put increasingly more trust in sales-facilitation services (like Buy Now Pay Later features) or coupon sites. These become the new incremental placements that your audiences search for offers at.
- Data confirms that modern customers seek quality offers more than cheap solutions. Accessing these audiences (that are already purchase-motivated) will attract higher sales to a brand.



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- › In search of the best offers, your audiences will look even outside of their current country of residence. Cross-border purchases are about to explode in 2023.
- › All your new marketing ventures should be designed to match the newest privacy and data protection standards. Third-party data handling is a no-go zone from now on.
- › Your potential customers do not really appreciate over-the-top messaging. Even if supporting the best of causes, your message can not seem forced. Make sure that you are transparent in every ESG-driven action, too.
- › And trust, built by offering quality, reasonable price, and all the aspects of creating your brand image, is indicated as the most important aspect of deciding which offer to choose.
- › On one hand, 2023 users express less enthusiasm towards Web3 solutions, but the market is still booming (although not as impressively as 12 months ago). On the other hand, AI seems to be the next hot trend with major companies increasing their budgets for developing more user-friendly solutions.
- › Your customers will be more than eager to use subscription services and in order to get full customizability, will opt in for mobile application download. See how you can use these trends to create an even deeper connection with brands.
- › Although after a few bumpy years, the customers feel concerned about the economic outlook, they will actually spend more and more, even with inflation rates leveled.
- › And finally, 2023 seems like it'll finally be a stable year, so plan your budgets as if nothing disrupting should happen.



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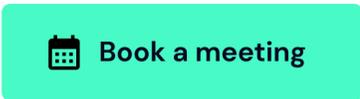
Thank You

If you'd like to discuss the covered topics further, we'll be happy to connect!



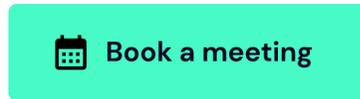
Peter Misek

Business Development Director
misek@zeropark.com



Jim Grace

Business Development Director, US
jim.grace@zeropark.com



Rudolf Schubert

Business Development Director
rudolf.schubert@zeropark.com

