

2021 Marketing Recovery Playbook

Key Strategies To Start Driving
Post-Pandemic Success Today!

April 2021

IN  MARKET



Overview

The COVID-19 global pandemic dramatically altered life as we knew it. After a year filled with challenges and uncertainty, 2021 has progressed with signs of hope as vaccine rollouts are fully underway across the US. In mid-April 2021, [over 50%](#) of US adults had received at least one dose of a COVID-19 vaccine; the US is averaging over [a million inoculations a day](#).

While there is a light at the end of the tunnel, there is no denying the dramatic impact that COVID-19 has had on consumer behavior. As a result, the retail landscape has vastly evolved, and for brands, this has transformed traditional planning and marketing initiatives. In addition, the technology and privacy landscape is also changing—including [new iOS 14 user prompts](#) and [the loss of third-party cookies](#). Together, these changes will impact some of the traditional ways by which marketers understand and target consumers in the future, further complicating audience insights and planning.

As marketers adapt to today's new reality, they must now look to both proactively serve customers at their exact moments of need and anticipate future needs. With pandemic recovery on the horizon, and technology and targeting changes within the marketing ecosystem happening in parallel, now is the time to prepare and prosper. In this "2021 Marketing Recovery Playbook", we lay out the key opportunities marketers should embrace during this period of transition to meet the moment and drive success.

Here are the top 10 opportunities to keep in mind for your post-pandemic planning:

- 1 Uncover The Changes In Consumer Shopping Behavior
- 2 As Consumers Begin To Mobilize, Monitor In Real-Time
- 3 Safety Concerns Will Stay Top Of Mind
- 4 Home: Still Our Multifunctional Central Base
- 5 Omnichannel Shopping: Maximize Shoppers' Convenience
- 6 Shift To Real-Time: Future-Proof Your Marketing Strategies
- 7 The Rise of Geo-Contextual Marketing
- 8 Trust & Transparency Reign Supreme
- 9 Jack Be Nimble... The Importance of Sense and Respond Capabilities
- 10 From Impression To Purchase, Measurement Is Critical To Success



How InMarket Can Help

InMarket's entire suite of solutions leverage our rich and unique data to help marketers demystify consumer behaviors and engage consumers in real-time at the most relevant moments during their purchase journey.



CONSUMER INTENT DATA—WHAT THEY SAY

100% first party, real-time consumer intent surveys via owned & operated apps



CONSUMER LOCATION DATA—WHERE THEY GO

100% permission-based SDK network across 218M MAUs (80% of US Consumers), including a Comscore-verified, 100% 1st party SDK consumer truth-set



CONSUMER PURCHASE DATA—WHAT THEY BUY

100% 1st party purchase & receipt data via 150,000+ opt-in consumer panel

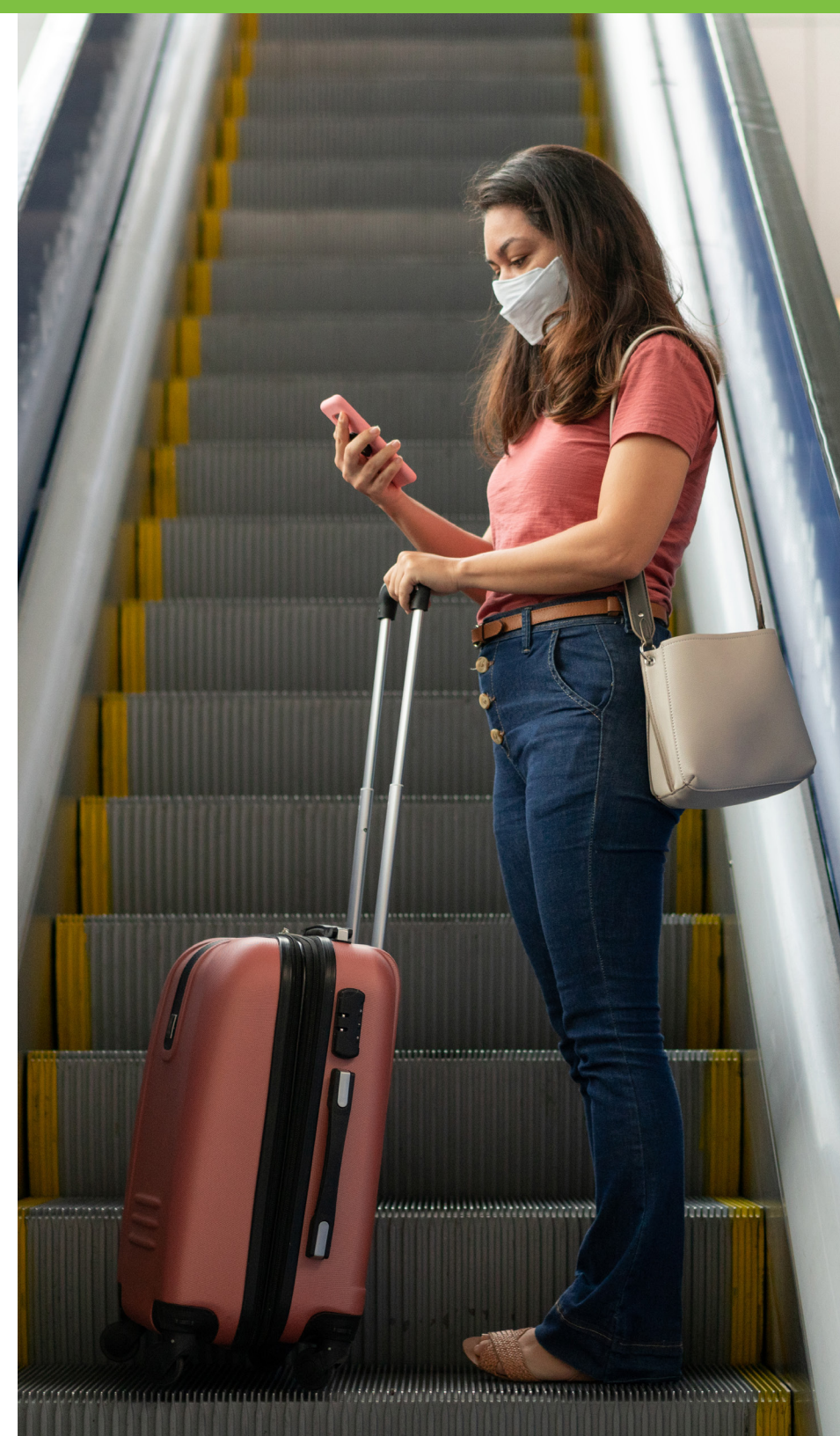
1 Uncover The Changes In Consumer Shopping Behavior

With stay-at-home orders, government-mandated business closures, and economic uncertainty, the pandemic directly impacted consumers' purchasing behaviors. For marketers, this meant the loss of any sort of predictability about shopping habits. By leveraging location and purchase data, marketers can uncover these changes in consumer shopping habits. Visitation frequency and patterns, time of visit, dwell time and spending patterns yield rich insights on what consumers are increasingly valuing. As an example, InMarket's pandemic retail research generally found that shopping trips were happening earlier in the day, and less frequently, with a decrease in dwell time and an increase in both bulk sizes (larger item sizes) and basket sizes (more items). Private-label brands, diet or "light" skus, and value items ruled the day. Uncovering these key shifts in behavior enables brands to connect with consumers around their needs and ultimately build better experiences and stronger loyalty over time.

2 As Consumers Begin To Mobilize, Monitor In Real-Time

After a year spent cooped up at home, consumers have begun to venture back out into the world, albeit slowly and cautiously. As inoculation counts rise, many adults are becoming more comfortable moving about this year: about half of consumers (51%) surveyed by InMarket said they would travel once the vaccine is made available to them. Certain business categories are already starting to see a return to near pre-pandemic foot traffic levels. According to InMarket's [EMI](#) (Economic Mobility Index), by the end of March 2021, Palm Springs casinos had reached pre-COVID levels, with Reno casinos following closely behind. Home improvement stores and QSRs have also seen similar returns to normalcy, and other industries are following quickly behind.

This recovery period is a multi-month phased effort, and a return to pre-pandemic normalcy will accelerate in the months ahead. Like many periods of transition, it's difficult to guess the behaviors of consumers as shopping patterns aren't fully recognizable yet. Understanding how consumers start shifting their behaviors once capacity restrictions lift and vaccinations rise not only helps marketers efficiently optimize strategies during this period of transition, but foreshadows what can be expected in the future once the world is fully opened back up again.





3 Safety Concerns Will Stay Top Of Mind

Even as infection rates fall and vaccination counts rise, the fear of communicable disease will not dissipate overnight. For many, COVID-19 amplified the need for consumers to protect and prioritize health and well-being. A November 2020 [ShopTalk survey](#) found that 79% of consumers expect retailers to continue enforcing safety measures in-stores. Minimizing contact both with fellow shoppers and with public equipment is increasingly appealing and will be essential for brands to maintain consumer loyalty. Aside from convenience, shoppers will continue to prioritize services like contactless payment, self-checkout, curbside pickup, contactless delivery, and click-to-cart. [A report by Incisiv](#) found that 85% of shoppers increased their use of curbside pickup compared to pre-COVID-19 times. Offering contactless payments at all points of sale—and ensuring shoppers have various channels by which to purchase and collect—will continue to be a necessity. Marketers who employ highly-desired contactless options are likely to reduce friction during the checkout process, foster positive shopping experiences, and ideally draw in more repeat business due to ease of purchase.



85%

of shoppers increased their use of curbside pickup compared to pre-COVID-19 times

Source: [Incisiv](#)

4 Home: Still Our Multifunctional Central Base

Americans have spent the better part of the last year stationed in one place—home. As offices, schools, gyms, and bars closed, the home became a centralized place for all things: working, learning, exercising, and celebrating. InMarket's [New Normal](#) report from May 2020 highlighted the rise of purchases for home-related products and services to bolster this new multi-functional space.

Even as consumers begin to mobilize, many behaviors will still continue. The pandemic dramatically increased streaming service consumption and mobile device usage, both equally important channels that can be leveraged by marketers. [Analysis of worldwide viewing times](#) during Q4 2020 found that average streaming times increased by 44%. It's worth noting that streaming ads have up to [96% view rates](#), and some ads claim [to boost brand perception by 32%](#) more than traditional TV. Consumer engagement on mobile devices is increasingly rising, too. In Q1 2021, [App Annie](#) found that US consumers are spending more than three hours a day on mobile, an increase of 10% above Q1 2019 levels. Utilizing Connected TVs (CTVs) and in-home mobile engagement provides marketers direct access to this significantly large population of highly engaged shoppers.

Furthermore, while the world is starting to gradually open back up, one group of the population shows no signs of returning to pre-pandemic life: remote workers. The pandemic's impact on remote work in particular has caused a dramatic shift, with many employers expanding work-from-home access to employees, whenever possible. With more remote workers than ever before, the home is an even more lucrative place for marketers to engage these non-commuting shoppers via Advanced TV options like CTV and mobile advertising.

A [Gartner survey](#) of company leaders found that:

47%

of employers plan to allow employees to work from home full-time

80%

said that they'll provide employees the option to work remotely part of the time

A [study by Upwork](#) found that:

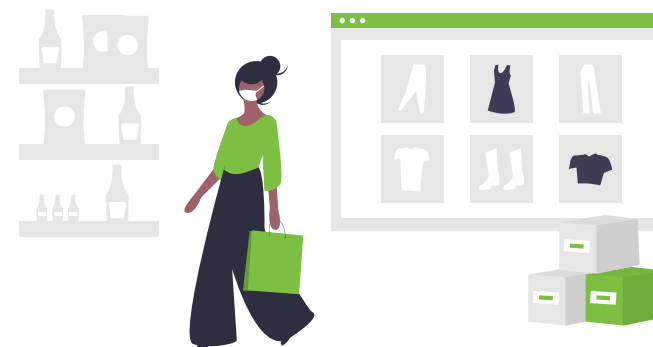
by **2025** more than **36.2** million Americans will be working remotely, an **87%** increase from pre-pandemic levels.





5 Omnichannel Shopping: Maximize Shoppers' Convenience

Omnichannel shopping has been rising in popularity in recent years, but in 2020, faced with store closures, social distancing complexities, and health concerns due to the pandemic, consumers supplemented in-store visits with services like curbside pickup or online delivery services. In fact, the [InMarket Holiday Shopping 2020 survey](#) found that 15% of shoppers were planning on shopping online with curbside pickup and [Nielsen](#) reported a 50% increase in omnichannel shopping for consumer goods in 2020. The pandemic was a tipping point for many consumers to try new channels and services, which helped ease concerns while also maximizing convenience. Omnichannel shopping is here to stay. Brands must accommodate these new delivery methods with an omnichannel approach in order to meet the needs of all shoppers. In addition, leveraging website-to-store attribution solutions enables marketers to monitor the success of campaign performance at driving consumers in-store.



50%

increase in omnichannel shopping for consumer goods in 2020

Source: [Nielsen](#)

6 Shift To Real-Time: Future-Proof Your Marketing Strategies

Consumers' digital footprints have grown exponentially over the last decade, and the control around what consumers share and with whom they share it has grown in tandem. Tech giants such as Apple and Google are evolving their user prompts and settings to provide consumers with more transparency and control over their data. While Apple's iOS 14 changes are here, the continued ban of third-party cookies by browsers including Google's Chrome, which accounts for 60%+ of all web traffic, are continuing. In fact, most industry experts expect Google Chrome changes will begin sometime in early 2022.

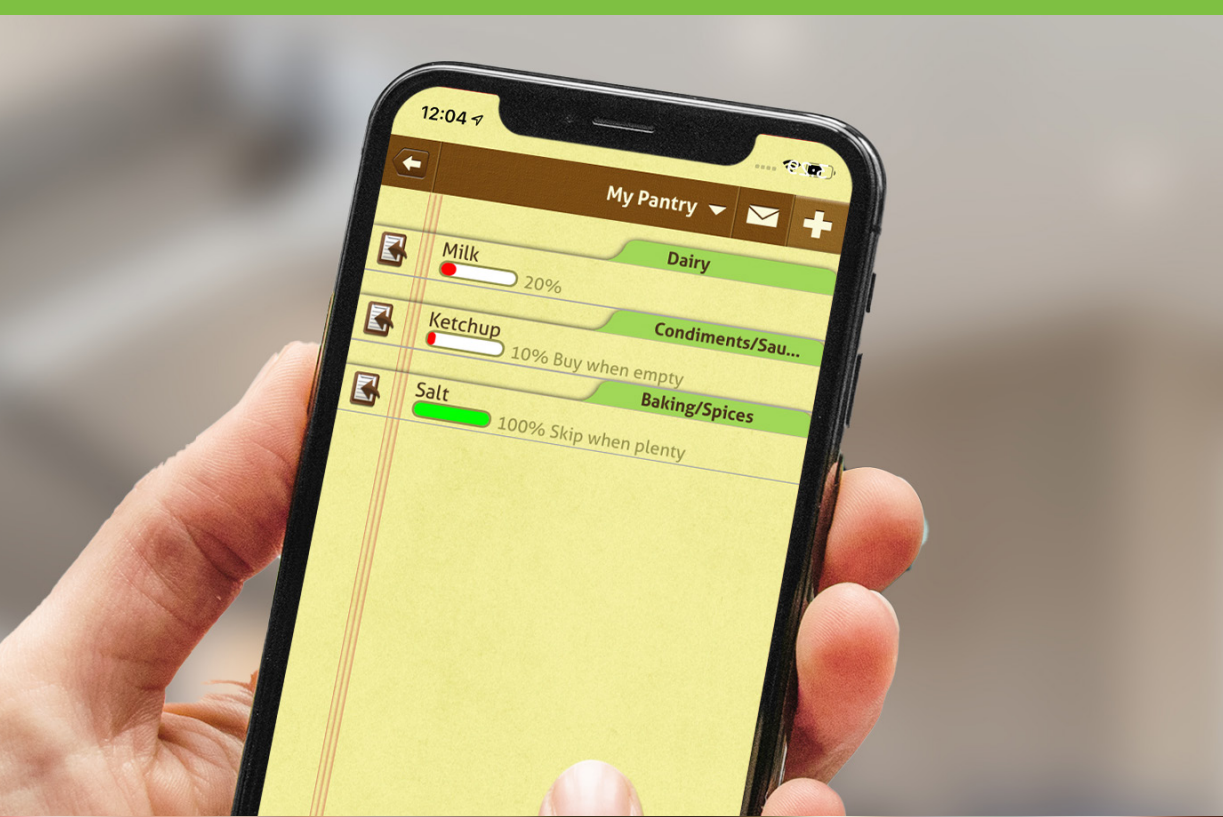
The anonymous IDFA and third-party cookie systems have been two invaluable tools for advertisers to understand consumer behaviors in order to effectively target and retarget them across third-party sites and apps. For years, these identifiers served as the backbone and economic engine to fuel the free content consumers enjoy across the websites and apps used on a regular basis. Done well, access to these identifiers and the data they collect drives a more personalized ad and overall experience.

But with reduced access to the IDFA and in the absence of third-party cookies, the shift towards geo-contextual marketing based on location and real-time marketing—which utilizes consumer context and location to reach shoppers while they are in the purchase process—will rise in importance. Powered by consumer context that is granted via app permissions, real-time marketing enables marketers to efficiently and effectively reach consumers at their precise moments of need. Brands will need to develop partnerships with apps and app networks that have access to first-party data at scale in order to leverage real-time marketing in this new world. By incorporating real-time marketing into strategies, brands will recover the ability to reach consumers during key moments in the path to purchase.



For a detailed analysis of the marketing implications of Apple's iOS 14, download InMarket's whitepaper, ["Real-Time Readiness: Understanding the Marketing Implications of Apple's iOS 14 Update."](#)

For more information about the end of third-party cookies, download InMarket's whitepaper, ["Crumbling Cookies: The Demise of Third-Party Cookies and the Rise of Geo-Contextual, Real-Time Marketing"](#)



7 The Rise of Geo-Contextual Marketing

Given the impact of these privacy changes by Apple and Google, what's old is new again. Aside from leveraging geo-contextual and real-time marketing, there will be a 'Back to the Future' moment. To some extent, digital marketing will return to its roots—where contextual marketing ruled the day. With Chrome's upcoming ban of third-party cookies, Google has proposed the [Federated Learning of Cohorts](#), a solution whereby users are grouped into cohorts based on shared interests and targeted accordingly, while still maintaining a level of consumer privacy. Permission-based location data will play a critical role in cohort-based segmentation, enabling marketers to use generalized knowledge of specific locations to target accordingly. For example, recognizing that a zip code contains a heavy concentration of banking locations that receive high visits, marketers can create an investor segment. Panel-based segments will also be created and advertising around related content will become staples in every digital marketers playbook.



8 Trust & Transparency Reign Supreme

As the world begins to emerge from the pandemic, consumers will continue to turn to brands they know and trust. For marketers, transparency in messaging will be key to building this trust. Data privacy is top of mind for many consumers, so at a minimum, apps, publishers and brands must transparently and frequently disclose all uses of consumer data, with clear messaging around notice, choice, access, and control. Specifically, two key changes by Apple—providing users more control over sharing precise location and requiring an opt-in to ad tracking—lets consumers determine what data they share and with whom. For deeper customer relationships, apps and publishers must provide compelling reasons in exchange for data sharing. Strong value propositions include apps that utilize consumer data for convenience, rewards, or necessity.

The impact of Apple's changes have potential implications, including a deterioration in the quality of location audiences built with “approximate” location data signals and a reduction in available inventory to target across the iOS user ecosystem. As a result, advertisers, including agencies and brands, will be required to increase their review and diligence around available data sources and partners to assure quality and performance benchmarks are maintained. Third-party verifications will play a critical role in reassuring buyer confidence when choosing partners.

A study by Location Sciences found:

65%

of budget is wasted on poor-quality and mistargeted location data

82%

of location audiences have been found as inaccurate

49%

uplift in savings and performance when transparency is applied to remove waste and inaccuracy

These findings further reinforce the importance of trust and transparency, while also emphasizing the impact and efficiency on performance and ROAS.



9 Jack Be Nimble... The Importance of Sense and Respond Capabilities

If 2020 taught marketers anything, it was the lesson of flexibility. Consumer demands fluctuated unpredictably throughout the year. In April, paper products were rationed, gym equipment was sold at a premium, and facemasks became a fixture at every POS location. In some cases, advertisements planned in 2019 became tone-deaf, and no longer seemed appropriate given the state of the world. Marketers had to quickly adapt and revamp finalized plans in order to adjust to the changing times.

The ability to move with agility and flexibility will be more important than ever, even long after the pandemic is behind us. The key to nimble optimization is data: understanding in-flight performance enables marketers to make quick adjustments intra-campaign, ensuring success is maximized. With real-time data, marketers can understand consumer behavior in the present and deliver messaging accordingly. But even more so, real-time consumer and campaign data provides insight into recovery progression. When provided with robust data, marketers can make adjustments quickly in order to thrive in this post-pandemic world.

10 From Impression To Purchase, Measurement Is Critical To Success

Measurement is a crucial component of any strategy, and will only continue to be important in a post-pandemic marketing landscape. One of the most invaluable tools for marketers to get a holistic understanding of their consumers' habits is via omnichannel attribution solutions. Marketing attribution software is growing at an impressive [14.4% CAGR](#) and is projected to reach \$3.6 billion globally by 2023. The increased focus on ROAS (return on ad spend) will require advanced omnichannel attribution solutions with multi-touch analysis to better understand the key drivers of campaign success. Attribution solutions provide marketers with the insights they need to make smarter decisions for new customer acquisition, at-risk customer retention, and loyalist growth. Solutions that turn this data into actionable intelligence will grow in popularity throughout the year, providing brands with the ability to optimize brand and competitive market share growth over time.

In addition, those that deliver on the holy grail of closed-loop marketing and enable marketers to understand the impact from impression to purchase will rise in popularity. In our post-pandemic world, customer experience and marketing efficiency (ROAS) are the new marketing battlefield. In fact, in a [2017 Gartner study](#), 81% of marketers responsible for customer experience said they expected to be competing mostly on the basis of customer experience within 2 years. Understanding attribution and measuring the success of marketing initiatives across channels and touchpoints combined with taking action off those insights will be critical in determining the winners from losers.



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of marketers responsible for customer experience said they expected to be competing mostly on the basis of customer experience

Source: [Gartner](#)

What This Means For You

The pandemic has taught marketers a number of lessons, from the opportunity to reach consumers at home to the importance of being nimble. As the world begins to enter recovery, brands and agencies must proactively strategize in order to effectively reach consumers in the moments that matter. To summarize, the 10 essential tips for marketers to successfully navigate pandemic recovery are:



1 UNCOVER THE CHANGES IN CONSUMER SHOPPING BEHAVIOR:

Analyze location and purchase data to understand how consumer shopping habits have changed as a result of the pandemic.

2 AS CONSUMERS BEGIN TO MOBILIZE, MONITOR IN REAL-TIME:

Understand how different sectors are recovering and stay on top of how consumers shift their behaviors as recovery progresses.

3 SAFETY CONCERNS WILL STAY TOP OF MIND:

Health fears won't dissipate overnight. Maintain high levels of in-store safety measures and offer contactless services like contactless payment, self-checkout, and curbside pickup, to ensure all customers are comfortable.

4 HOME: STILL OUR MULTIFUNCTIONAL CENTRAL BASE:

Dial up efforts to connect with consumers at home by embracing mobile, CTV, and more.

5 OMNICHANNEL SHOPPING: MAXIMIZE SHOPPER'S CONVENIENCE:

Adopt a holistic omnichannel strategy and orchestrate messaging throughout the entire customer journey.

6 SHIFT TO REAL-TIME: FUTURE-PROOF YOUR MARKETING STRATEGIES:

Ensure your marketing strategies are protected against the impact of the iOS 14 update and the ban of third-party cookies. Leverage real-time marketing strategies in order to reach consumers as the ecosystem shifts.

7 THE RISE OF GEO-CONTEXTUAL MARKETING:

Digital marketing will return to its roots with the return of contextual marketing. Leverage cohorts and panel-based segments to target consumers effectively.

8 TRUST & TRANSPARENCY REIGN SUPREME:

Build trust by overcommunicating the steps your brand is undertaking to protect consumer data privacy.

9 JACK BE NIMBLE...THE IMPORTANCE OF SENSE & RESPOND CAPABILITIES:

Utilize data to efficiently adapt to and thrive among changing consumer trends in real-time with flexibility and ease.

10 FROM IMPRESSION TO PURCHASE, MEASUREMENT IS CRITICAL TO SUCCESS:

Measure everything, especially the key drivers of success. Omnichannel, multi-touch attribution will yield actionable insights to help maintain and grow program success.

InMarket is here to support you every step of the way to drive success and omni-ROAS in the post-pandemic marketing landscape.

The InMarket Offering - From Impression to Purchase

TARGET, DELIVER, MEASURE, OPTIMIZE, REPEAT

AUDIENCES

The Most Accurate + Precise Scaled Consumer Reach



ACTIVATION

Real-Time, Omnichannel Brand Experiences



ANALYTICS

360° Consumer Intelligence for Real-Time Actionability



ATTRIBUTION

The Industry Standard for Offline Measurement



For more information on InMarket's suite of solutions, or to request a recovery strategy for your brand, please contact us at [InMarket.com/contact](https://inmarket.com/contact)

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