



THE STATE OF

PPPC

GLOBAL REPORT 2024



 PPCsurvey.com

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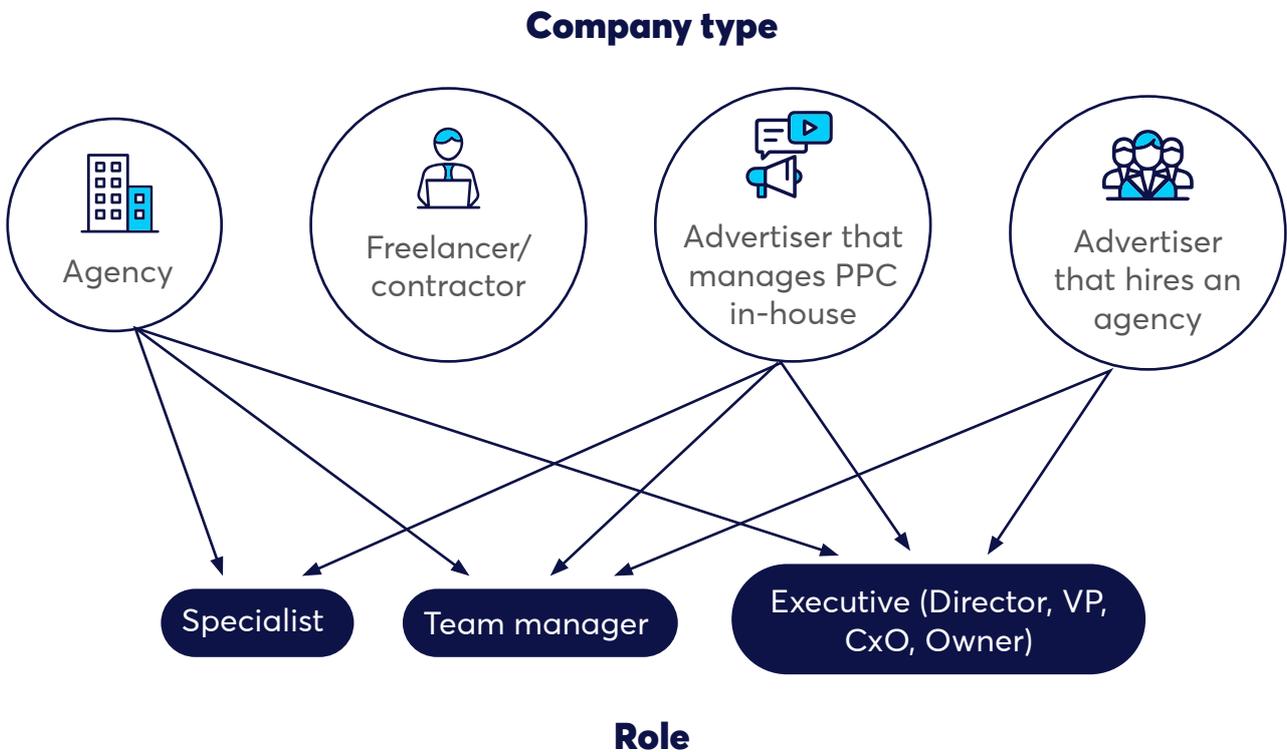
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1. Introduction

You're reading the second edition of the global "State of PPC Report." After a successful first edition in 2022, we're happy to return bigger and better than ever.

- ◆ We've updated and expanded the questions to reflect changes over the past two years.
- ◆ The number of valid and complete¹ survey responses increased by 110%, from 540 to 1,135. This makes it the largest survey ever conducted with online advertising professionals.
- ◆ Three new partners joined this project: Datafeedwatch by Cart.com, Optmyzr, and smec (Smarter Ecommerce).
- ◆ We took over the Top 25 Most Influential PPC Expert list from PPC Hero, as they stopped doing this after their last edition in 2021. PPC Hero gave us the green light to carry on their legacy, and we expanded it to include the Top 50 Most Influential PPC Experts.

As in the first edition, we created a dynamic survey that asks relevant questions based on our respondents' company type and role.



¹To prevent pollution of the survey results and "friends & family" votes on the top expert list, each survey entry was manually reviewed, and over 200 invalid entries (including their votes) were dismissed.

By doing so, we were able to go deeper into the challenges, satisfaction, and technology adoption that are unique to each company type and role.

And wherever it makes sense, we'll share segmented results to allow for comparisons between regions, company types, experience levels, and spend levels.

2. Partners

As mentioned in the introduction, three new partners joined this research, which helped increase our reach, especially outside of Europe and with e-commerce agencies and brands.

We provide this research free of charge and don't gate it behind a form asking for your personal information.

We hope the short descriptions below sound promising enough for you to visit our websites and learn more about how each partner helps PPC professionals get better results in less time.



DataFeedWatch by Cart.com is a leading feed management solution that combines data transformation with help & advice, empowering merchants and agencies to succeed on 2,000+ eCommerce channels like Google, Facebook, and Amazon. The company operates in 60+ countries and fuels over 0.5 billion product listings daily.

GODTIERADS

The God Tier Ads Framework is the always updated Google Ads training, giving you instant clarity and done-for-you templates, so you don't devote your life to the machine.

Trusted by over 3,500 PPC agencies and professionals around the world.

OPTMYZR

Optmyzr is a complete PPC management suite with everything agency and in-house teams need to run Search, Shopping, Performance Max, and Amazon campaigns their way.

Optmyzr customers use automation and customizable workflows to manage a collective \$5 billion in yearly ad spend.



Producthero helps e-commerce advertisers get more conversions from their shopping ads. Producthero is Europe's largest Premium Google CSS Partner and offers a platform that allows you to optimize your product titles, automatically segment products and monitor competitor prices so you can adjust your campaigns.



Smarter Ecommerce (smec) is a tech-led and full-service performance marketing partner, supporting online retailers since 2007.

We help ecommerce businesses to run inventory-driven, large-scale performance marketing campaigns resulting in sustainable growth.



Swydo is an automated reporting and monitoring platform that enables online marketers to monitor, analyze, and communicate meaningful insights.

Marketers can integrate data from 30+ marketing platforms (like Google Ads), and generate fully customized reports to share with customers and stakeholders.



TrueClicks aims to set and raise the PPC quality standard and as such, to be the independent source for grading and analyzing paid search accounts.

Offering user-friendly monitoring, auditing, insights and automation for Google Ads and Microsoft Advertising.

Free forever up to \$50K/mo.

We hope you'll enjoy reading this report as much as we did creating it!

For questions, suggestions, and potential future partnerships, please email ppcsurvey@trueclicks.com

3. Survey methodology and demographics

PPC professionals could fill out the survey on PPCsurvey.com between November 2nd and December 24th, 2023.

Respondents were invited to the survey by one of the partners above or learned about this initiative through social media (mainly LinkedIn) or through word-of-mouth, especially from the Top 100 experts we nominated on our website.

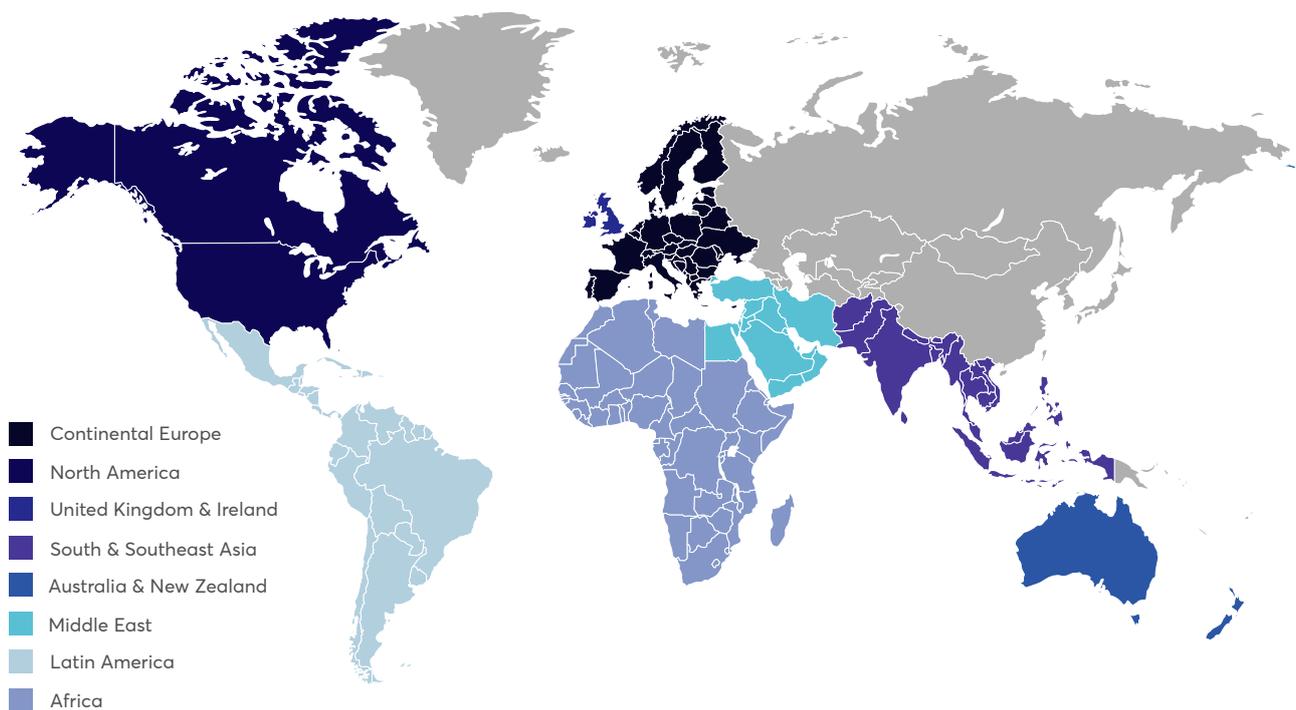
Leaving an email address was optional. We offered various prizes and early access to this report as incentives. We also planted a tree for each survey entry through our partner Eden Reforestation Projects.

For respondents to be eligible for a prize and early access, we required an email address, but we won't use it for anything other than these purposes.

We thank all our respondents for completing our rather long survey. We hope this report shows it was time well spent.

In the rest of this chapter, let's dive into our participants' backgrounds.

3.1 Geographic breakdown



We asked respondents to choose their country and grouped these into the regions below to allow for comparisons later in this report.

Continental Europe: 455 respondents (40.1%). All countries on Europe's mainland, including the Nordics. All the way to (and including) Greece in the southeast and all the way to (but not including) Russia in the east.

North America: 341 respondents (30.0%). The United States and Canada.

UK & Ireland: 165 respondents (14.5%).

South & Southeast Asia: 69 respondents (6.1%). This included the following countries in our survey: India, Pakistan, Philippines, Singapore, Vietnam, Malaysia, and Thailand.

Australia & New Zealand: 42 respondents (3.7%).

Middle East: 25 respondents (2.2%). This included the following countries: United Arab Emirates, Turkey, Israel, and Egypt.

Latin America: 23 respondents (2.0%). All countries in the Americas that aren't the United States or Canada. This included the following countries in our survey: Brazil, Argentina, Colombia, and Mexico.

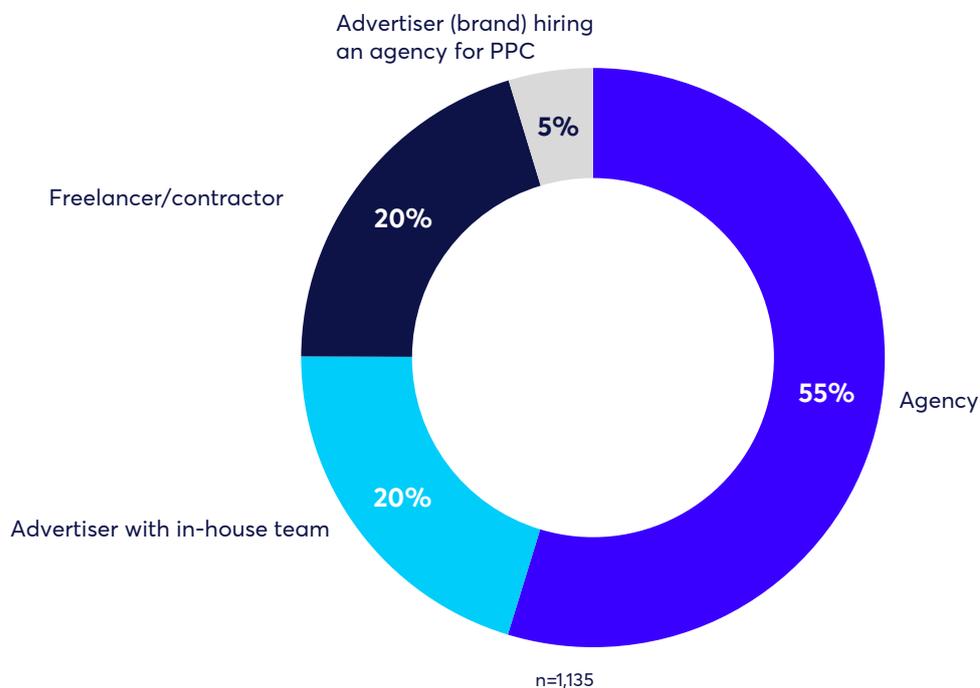
Africa: 13 respondents (1.1%). All countries in Africa except Egypt. This included the following countries: South Africa, Morocco, Nigeria, Kenya, and Namibia.

Three main factors can explain the distribution above.

- ◆ Most partners are based in Europe.
- ◆ The survey was in English.
- ◆ Many questions were about Google Ads.

Outside of English-speaking countries, we saw that most respondents came from countries with an online advertising industry dominated by Google and a high level of English proficiency. This explains why we didn't see respondents from countries like China, Russia, and Japan.

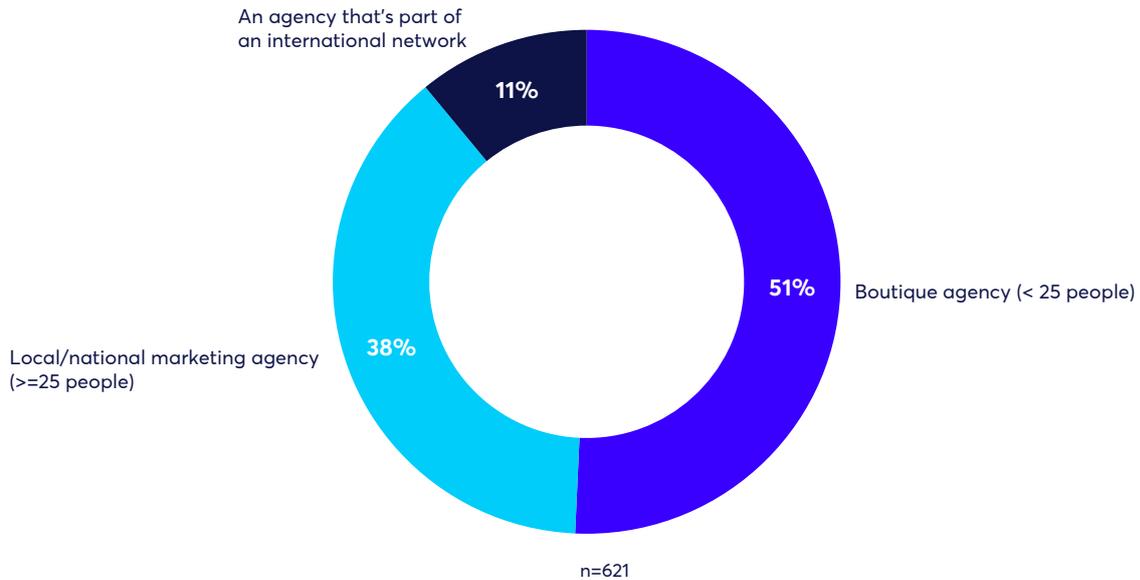
3.2 Company type



If we add up agencies and freelancers, we see that 75% of our respondents manage PPC campaigns on behalf of their clients, while 20% work in-house.

As in the previous edition, it was very hard to reach people who work at brands that hire agencies or freelancers (5%). Unfortunately, we aren't able to share their data in this report because we don't have enough of their responses.

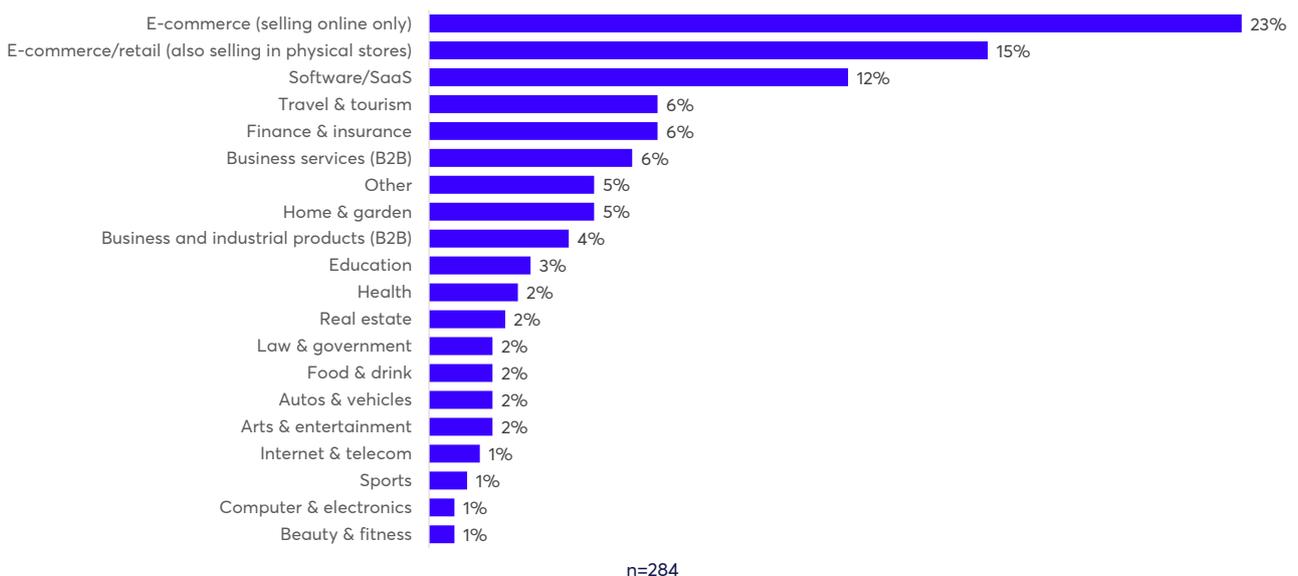
3.2.1 Type of agency



As in the previous edition, more than half of our agency respondents work for a boutique agency with fewer than 25 employees. Nearly 40% work at a larger agency, and 11% work for an agency that's part of an international network.

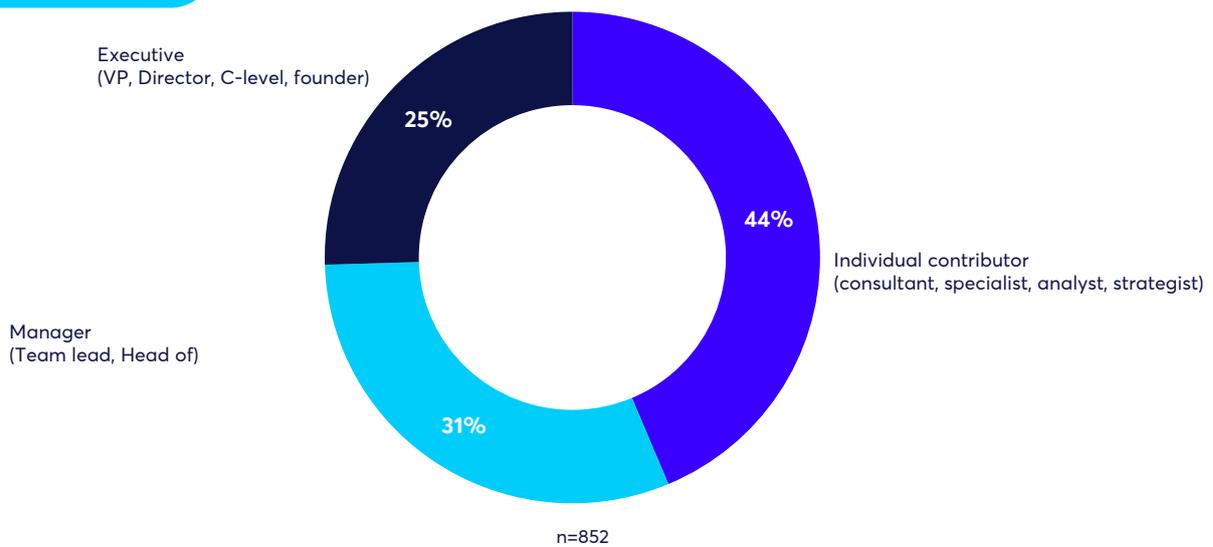
3.2.2 Advertiser industry

Our advertiser respondents work in the following industries:



We split out e-commerce into pure players (selling online only) and retail players with physical stores. Together, they represent 38% of our advertiser respondents.

3.3 Role

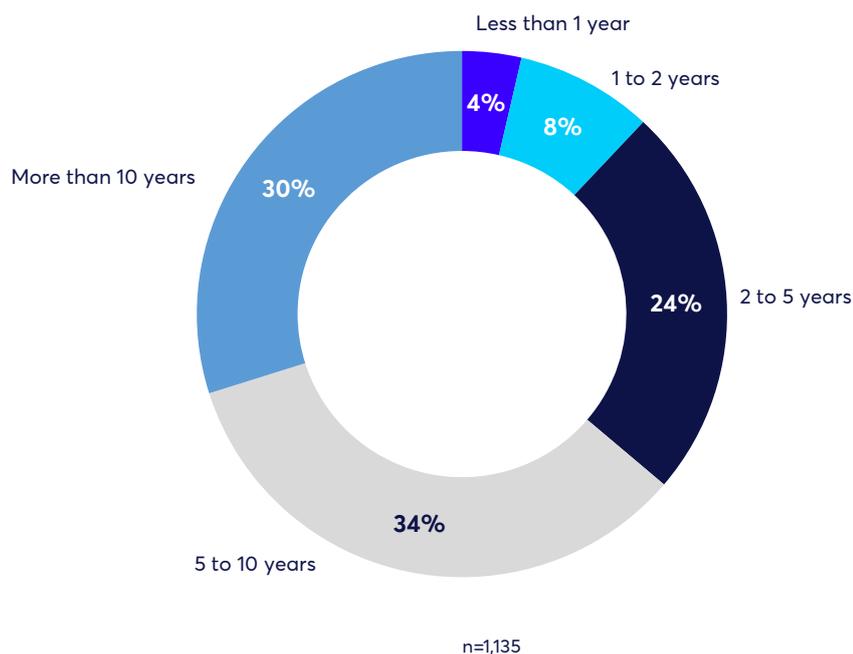


For all respondents working at an agency or in-house, we asked which of the three options above best describes their role in the company. We didn't ask freelancers and brands that hire agencies this question.

We're happy to see a nicely balanced distribution of roles in our survey. The individual contributors and freelancers got the most questions in the survey, as their hands-on roles allowed them to answer questions about daily campaign management, platform features, and tools.

3.4 Experience

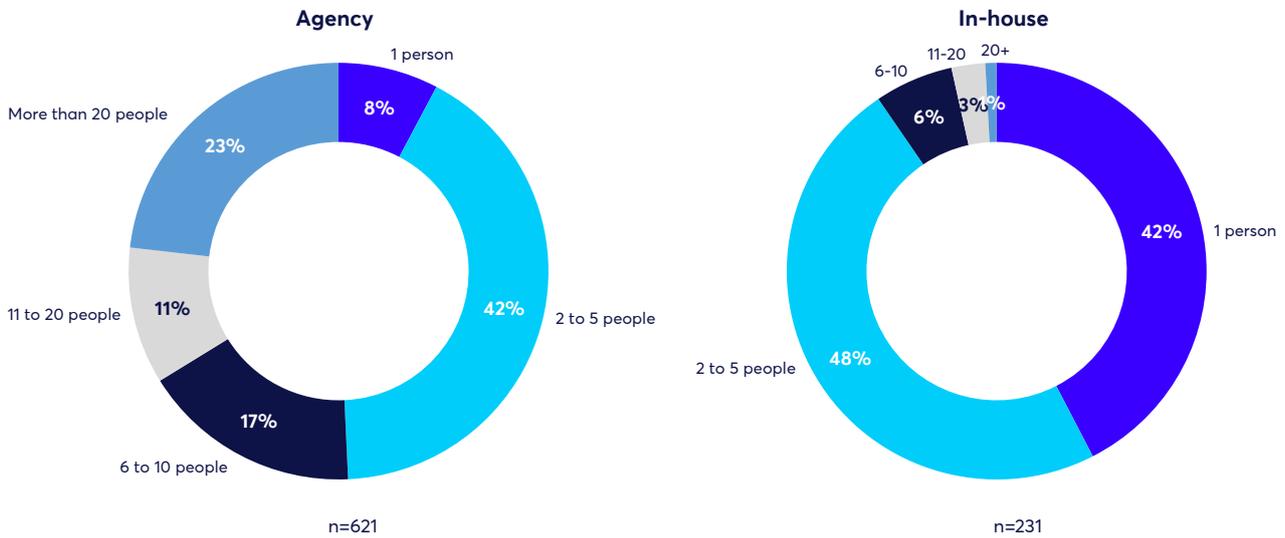
We didn't ask this in the previous edition, but knowing how long our survey respondents have worked in online advertising makes sense. This allows us to compare answers based on experience level.



As the graph shows, most respondents are (very) experienced PPC professionals.

3.5 PPC Team sizes

We asked all respondents, except brands hiring an agency, how many people in their company are dedicated to PPC. Below, you'll see the distribution of team sizes within agencies and in-house teams.

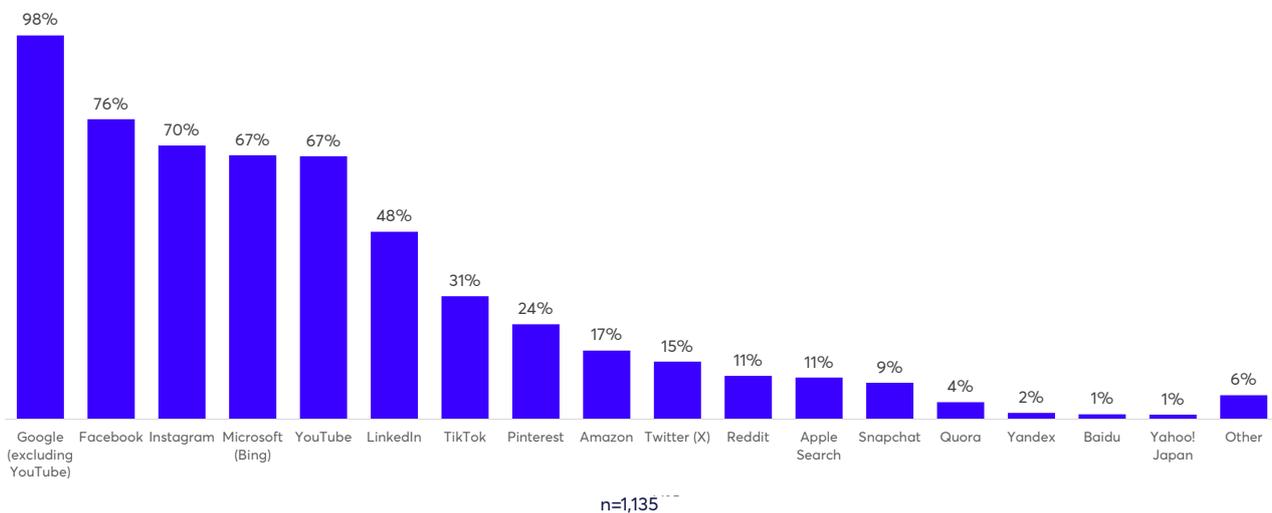


As expected, most in-house teams are rather small, with just 10% of in-house PPC teams being more than five people. Even within agencies, the most common PPC team size is two to five people.

Still, larger team sizes are much more common at agencies: 51% of agency PPC teams consist of six or more people.

4. Ad platform adoption and spend

4.1 Ad platform adoption



For the overview above, we asked our participants, "On which platforms are you (or your team) currently running PPC campaigns?"

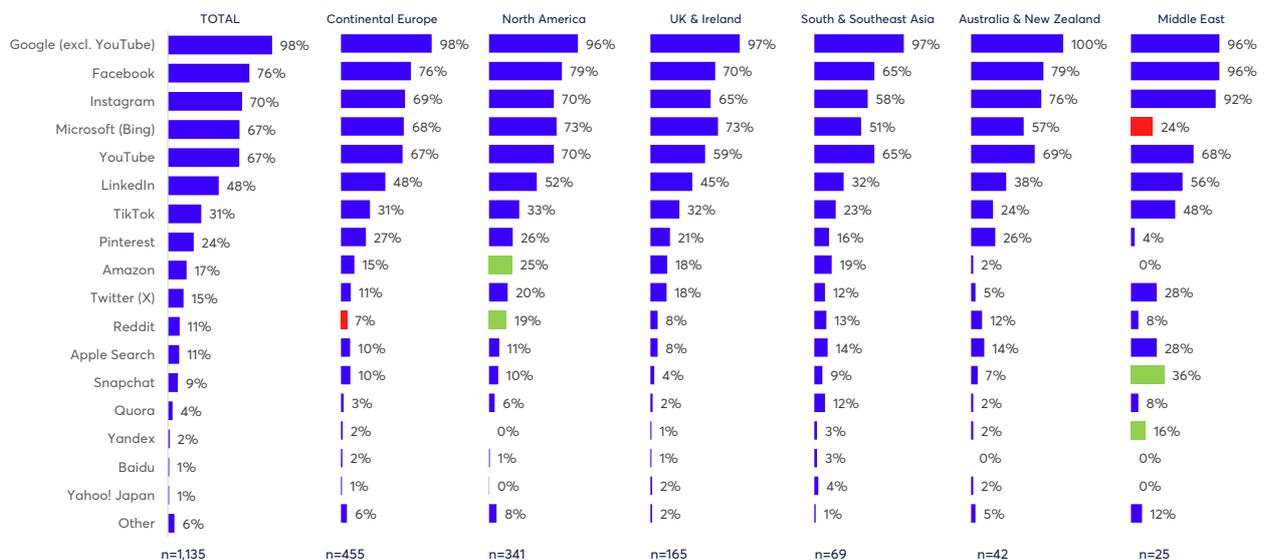
We didn't ask for the distribution of spend across these platforms. The percentages in the chart above simply indicate how often a platform was part of the advertising mix, not necessarily the relative spend on that platform. To learn more about the total global spend on the main networks, we've created a table at the end of this chapter.

As expected, Google, Facebook, and Instagram comprise the top three of this list.

The advertising mix becomes more interesting when segmented by geography and monthly spend under management, so we'll do that in the following two paragraphs. For respondents who selected "Other" and entered additional platforms, these were the most commonly mentioned platforms (not listed above): Display & Video 360, StackAdapt, Capterra (Gartner Digital Markets), Spotify, Criteo, Taboola, Outbrain, RTB House, AdRoll, Naver, and Seznam.

We'll be sure to add those options next time to show a more detailed breakdown of ad platform adoption.

4.1.1 Platform adoption by geography

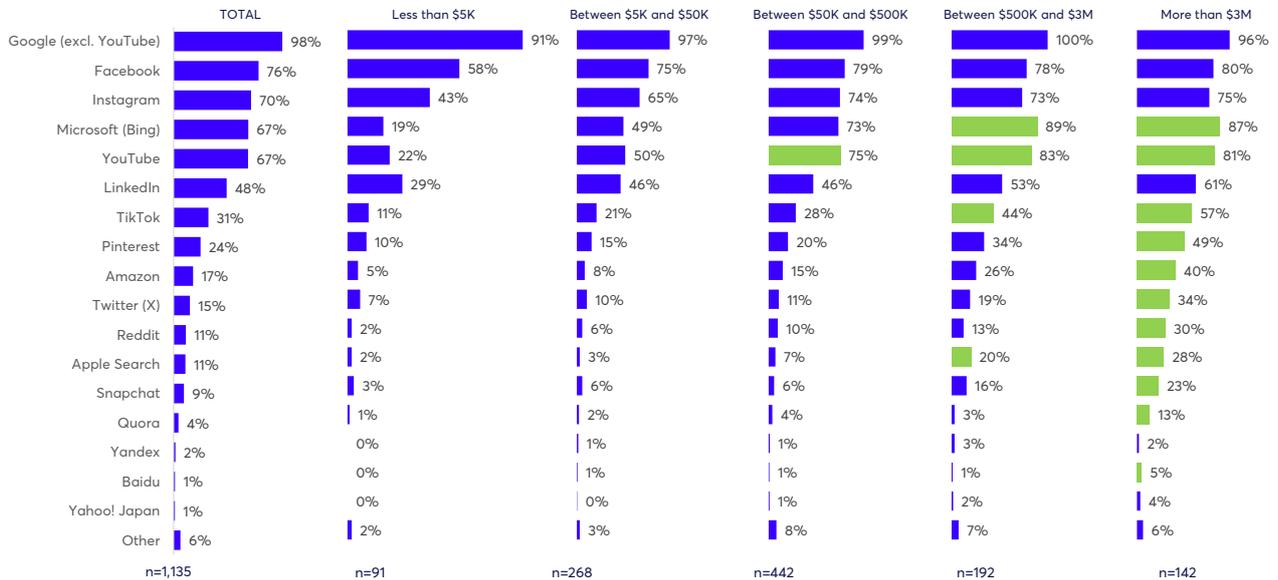


As you can see in the chart above, some platforms have significantly different adoption across different regions:

- ◆ **Microsoft Advertising** is less popular in the Middle East, where it's used by just 24% of respondents vs. an average of 67%.
- ◆ **Amazon Ads** are most popular in North America, with 25% of respondents using it vs. an average of 17%.
- ◆ The same goes for **Reddit**, which is used significantly more in North America (19%) and significantly less in Continental Europe (7%).

- ◆ Finally, **Snapchat** and **Yandex** see higher adoption in the Middle East, 36% and 16%, respectively.

4.1.2 Platform adoption by monthly spend level

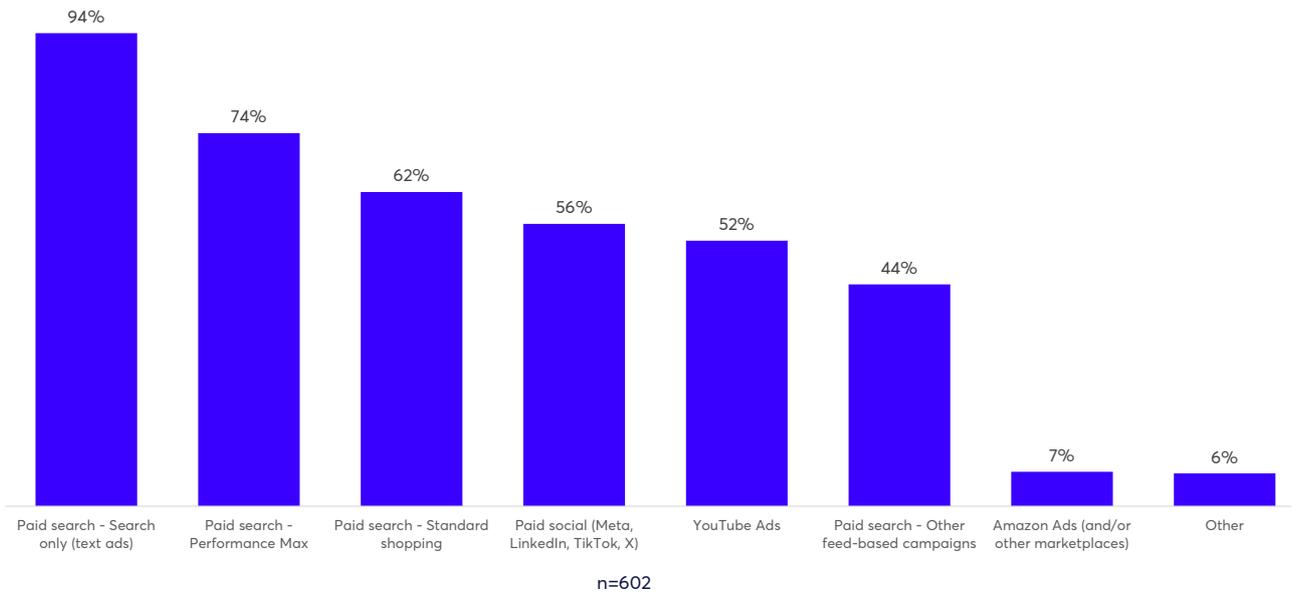


When monthly spend levels are below \$50K, Google and Meta make up most of the advertising mix. But once spend levels increase, we see the following platforms being adopted more:

- ◆ **YouTube Ads** is the first platform to see a significant increase in adoption once monthly ad budgets exceed \$50K.
- ◆ The following platforms see increased adoption once monthly spend levels exceed \$500K: **Microsoft Advertising, TikTok, and Apple Search.**
- ◆ Finally, these platforms are included more often once the monthly spend level (under management) exceeds \$3M: **Pinterest, Amazon, Twitter (X), Reddit, Quora, and Baidu.**

4.1.3 Platforms managed on a weekly basis

We asked individual contributors and freelancers which of the channels below they manage weekly (they could select all that apply). Interestingly enough, Performance Max is already more prominent than Standard Shopping. Our audience isn't as involved with Amazon Ads as one may expect when looking at the growing ad spend on that platform at the end of this chapter.

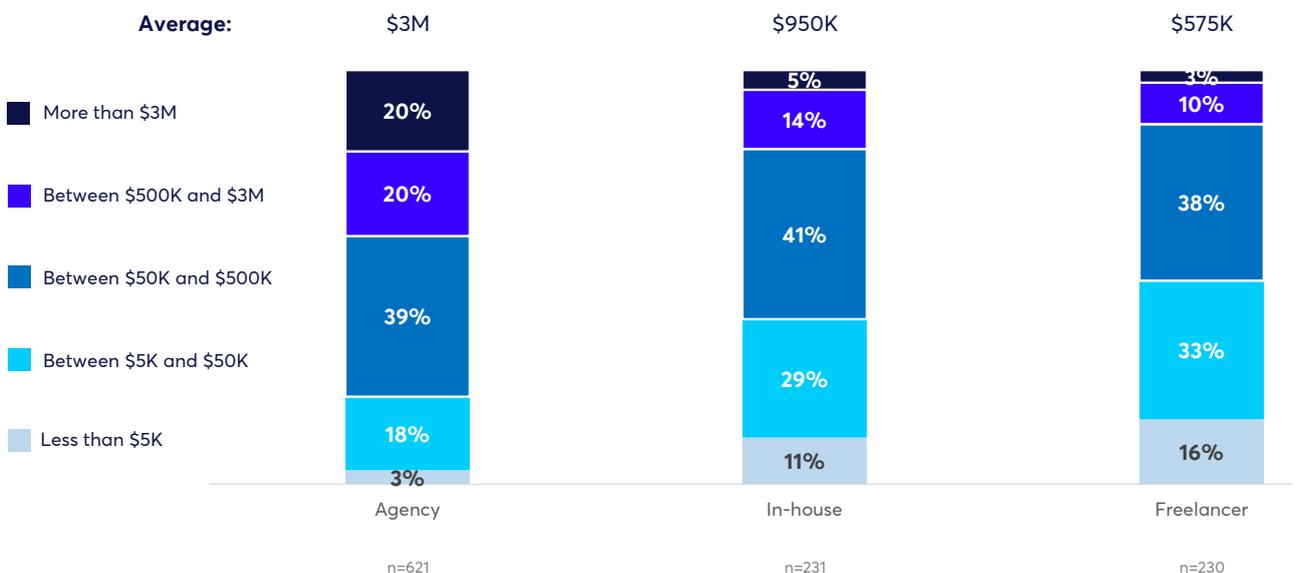


Most of our specialist respondents focus primarily on paid search. A deeper analysis of this question revealed that 55% of specialists managing paid search also manage paid social and YouTube campaigns weekly. This didn't differ significantly between agencies and in-house teams.

So, about half of PPC specialists manage paid search only, and the other half manage other channels next to it.

4.2 Monthly spend by company type

As expected, we see agencies managing higher monthly spend levels (\$3M/mo on average), followed by in-house teams (\$950K/mo) and freelancers (\$575K/mo). Not all freelancers are solopreneurs; some hire one or two employees.



4.3 Monthly spend per team member: agency vs. in-house

As we asked for company type, team size, and the monthly spend under management, we were able to combine these answers to find out how much PPC spend one person manages on average within agencies and in-house teams.

Monthly spend level	Agencies		In-house teams	
	Avg. team size	Avg. monthly spend per team member	Avg. team size	Avg. monthly spend per team member
< \$5K			1.6	\$1,585
\$5K - \$15K			1.7	\$6,000
\$15K - \$50K	6.0	\$5,417	2.1	\$15,395
\$50K - \$100K	6.8	\$11,020	2.4	\$31,065
\$100K - \$250K	7.7	\$22,796	2.9	\$59,945
\$250K - \$500K	9.1	\$41,271	4.9	\$76,049
\$500K - \$1M	10.0	\$74,655	5.3	\$141,089
\$1M - \$3M	15.2	\$131,705	6.2	\$323,699
\$3M - \$5M	22.0	\$181,818		
\$5M - \$10M	21.1	\$355,380		
\$10M - \$20M	26.5	\$566,686		
> \$20M	26.0	\$962,067		

We didn't have enough data from in-house teams managing more than \$3M/mo, so we left that out.

We had to average both the team size and the spend level, so this table is less about the exact values in each cell and more about the pattern that quickly emerges when comparing agencies and in-house teams and different spend levels within a company type.

- ◆ Given the same total spend level, in-house employees can manage two to three times as much monthly spend per team member. This makes sense, as in-house teams don't have to deal with many different clients (and all the corresponding communication), pitching, onboarding, etc.

- ◆ Agencies managing less than \$250K/mo will have a hard time making a profit on their employees based on the numbers above. Even at 20% of ad spend, the resulting fee doesn't cover the fully loaded cost of hiring an employee in most Western countries. We'll have to assume their team is also generating revenue by providing services other than PPC management.
- ◆ Once agencies manage more than \$1M/mo, the average team member manages more than \$100K, which makes them more efficient than in-house employees who manage less than \$500K/mo.
- ◆ Once agencies manage more than \$5M/mo, they make a huge jump in efficiency, with more than \$350K of monthly spend per employee under management.

4.4 Global yearly ad spends

To get a feel for budget distribution across platforms, it's best to investigate the financial reports of the corresponding companies, so we did.

The table below shows the advertising revenue (the flip side of all advertisers' ad spend) between 2020 and 2023 on the leading ad networks.

Microsoft has a fiscal year ending on June 30, so their data lags behind by six months compared to the other platforms. TikTok doesn't publish its advertising revenue, and Microsoft doesn't break down LinkedIn revenue by service (total 2023 LinkedIn revenue was \$15B). That's why we included estimates for TikTok and LinkedIn advertising below.

Platform	Yearly advertising revenue in billions (USD)				CAGR
	2020	2021	2022	2023	
Google - Search & other ²	\$104	\$149	\$162	\$175	19%
Google - YouTube	\$20	\$29	\$29	\$32	17%
Google - Network	\$23	\$32	\$33	\$31	10%
Microsoft search ³	\$9	\$9	\$12	\$12	10%
Amazon ⁴	\$20	\$31	\$38	\$47	33%
Meta ⁵	\$84	\$115	\$114	\$132	16%
TikTok (estimate) ⁶	\$1	\$4	\$10	\$13	111%
LinkedIn (estimate) ⁷	\$3	\$4	\$5	\$6	25%

²Alphabet Inc., Form 10-K for the Fiscal Year Ended December 31, 2023

³Microsoft Corporation, Form 10-K for the Fiscal Year Ended June 30, 2023

⁴Amazon.com Inc., Form 10-K for the Fiscal Year Ended December 31, 2023

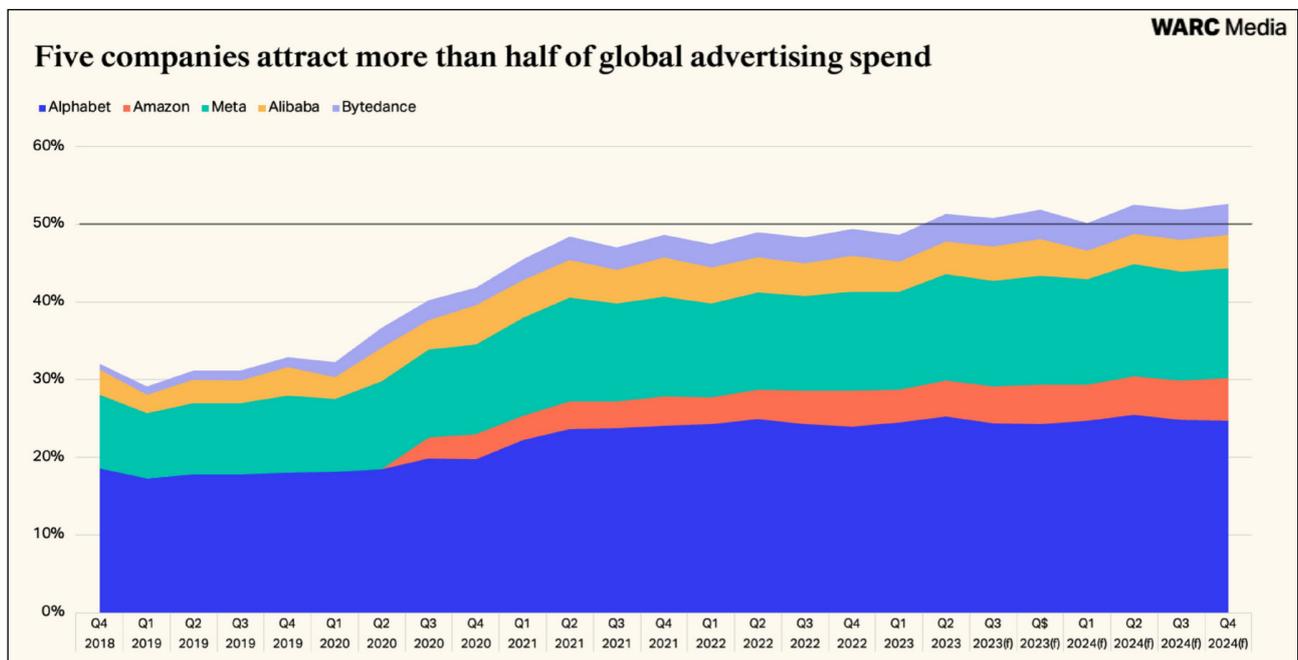
⁵Meta Platforms Inc., Fourth Quarter and Full Year 2023 Financial Highlights

⁶eMarketer, TikTok Net Ad Revenues Worldwide 2021-2025 (April 2023)

⁷Statista, Annual advertising revenue generated by LinkedIn worldwide

As published by WARC in August 2023⁸, global advertising is expected to grow by 8.2% in 2024, and it will top \$1 trillion this year for the first time ever. Over 50% of that global advertising spend goes to these five major tech firms:

- ◆ Alphabet (Google, YouTube)
- ◆ Meta (Facebook, Instagram)
- ◆ Amazon
- ◆ Alibaba
- ◆ Bytedance (TikTok, Douyin)



What may surprise the paid search readers of this report is that social media ad spend is expected to equal paid search spend by the end of 2024. If this trend continues, it will surpass paid search in 2025.

As the WARC report states, the key drivers for social media growth are social commerce and short-form video (TikTok, Instagram Reels, YouTube Shorts).

Younger generations (such as Gen Z) use social media more than TV and are more likely to search for recommendations and discover brands on TikTok and Instagram than on search.

⁸WARC, Global advertising to top \$1 trillion in 2024, as big five attract most spending (August 2023)

WARC	USD millions, Nominal			Year-on-year % change			Share of total		
	2022	2023(f)	2024(f)	2022	2023(f)	2024(f)	2022	2023(f)	2024(f)
Social Media	180,630.0	201,389.7	227,220.2	2.0%	11.5%	12.8%	19.6%	20.9%	21.8%
Search	197,966.1	210,006.9	229,233.6	8.3%	6.1%	9.2%	21.5%	21.8%	22.0%
Retail Media	116,370.3	128,271.3	141,705.7	12.0%	10.2%	10.5%	12.6%	13.3%	13.6%
Online Display	76,385.0	78,048.3	85,086.7	2.9%	2.2%	9.0%	8.3%	8.1%	8.2%
Online Classified	21,862.7	21,980.8	22,800.2	-6.0%	0.5%	3.7%	2.4%	2.3%	2.2%
Pure Play Internet	593,214.1	639,697.1	706,046.4	5.7%	7.8%	10.4%	64.3%	66.4%	67.7%
Linear TV	166,378.0	157,415.2	162,995.4	-5.4%	-5.4%	3.5%	18.0%	16.3%	15.6%
CTV	26,463.8	29,477.0	33,041.3	39.2%	11.4%	12.1%	2.9%	3.1%	3.2%
Premium Video	192,841.8	186,892.1	196,036.6	-1.0%	-3.1%	4.9%	20.9%	19.4%	18.8%
Newsbrands	36,490.2	34,581.3	34,013.3	-6.6%	-5.2%	-1.6%	4.0%	3.6%	3.3%
Magazines	15,694.2	14,926.5	14,559.5	-10.8%	-4.9%	-2.5%	1.7%	1.5%	1.4%
Publishing	52,184.4	49,507.8	48,572.8	-7.9%	-5.1%	-1.9%	5.7%	5.1%	4.7%
Radio	29,461.8	28,740.9	29,366.8	7.7%	-2.4%	2.2%	3.2%	3.0%	2.8%
Online Audio	6,245.4	6,670.2	7,227.3	18.5%	6.8%	8.4%	0.7%	0.7%	0.7%
Audio	35,707.3	35,411.1	36,594.1	9.5%	-0.8%	3.3%	3.9%	3.7%	3.5%
Cinema	2,460.3	2,739.2	2,881.6	-2.7%	11.3%	5.2%	0.3%	0.3%	0.3%
Out of Home	46,097.5	49,223.2	52,800.3	1.7%	6.8%	7.3%	5.0%	5.1%	5.1%
Total	922,505.4	963,470.6	1,042,931.8	3.3%	4.4%	8.2%	100.0%	100.0%	100.0%

WARC Media, *Ad Spend Outlook 2023/24: Withstanding Turbulence, August 2023*

5. Goals and challenges

5.1 Priorities for 2024

We asked all our respondents the same open-ended question: "What's your top priority for 2024?"

Some entered just one priority; others mentioned multiple priorities. We tagged each answer with recurring themes below to create the following word cloud and table:



In the table below, we clarify some of the themes above. Some are self-explanatory (like client retention), so they're not in this table.

Theme	Examples/clarification
AI & Automation	Implementing AI/ML/automation, further develop AI (skills)
Campaign performance	Improve ROAS, CPA, conversions, leads, etc
Measurement	1st party data, attribution, cookieless, conversion tracking, GA4
Personal development	Improve knowledge and skills, learning new platforms and technologies
Profit	Increase profits, POAS
Privacy	Being compliant

It's no surprise to see AI & Automation written largely in this word cloud. This is the story of the last several years in Google Ads, from broad match keywords to automated bidding to automated creatives and placements. Following this trend, every platform now has highly automated campaign types, from Google's Performance Max and TikTok's Smart Performance to Meta's Advantage+ and Amazon's Performance+. None, however, is more creatively named than Pinterest's very own Automated Campaigns.

Indeed, the next largest topics, Campaign Performance and Personal Development, intersect sharply with AI as teams both in-house and agency-side scramble to retrain and upskill employees while navigating a challenging macro-environment with new, arguably unwieldy technology.

The last topic to highlight is measurement, which is more complex than ever in the age of cookie deprecation and tough regulatory actions. There is likely to be a strong increase in topics like Marketing Mix Modelling and high-level metrics such as Marketing Efficiency Ratio, where the challenges again are ones of skill, tech, and how to derive action.

5.2 What does success look like for PPC professionals

We asked all our respondents, "What does success look like for you in your role, and how do you measure it?"

Below, we'll split out the results for agencies and freelancers and for in-house teams.

5.2.1 For agencies and freelancers

Employee satisfaction
Client satisfaction
Increase campaign efficiency
Meet client expectations
Client retention
Increase campaign volume
Revenue growth

We clarified a few themes in the table below.

Theme	Examples/clarification
Meet client expectations	Hitting or exceeding the client's targets/KPIs
Increase campaign efficiency	Improve ROAS, CPA, ROI
Client satisfaction	Happy clients. This is often measured by NPS or other surveys.
Increase campaign volume	Increase conversions, leads, revenue from advertising, traffic
Employee satisfaction	A happy team with low voluntary turnover.



"There is a heavy bias towards measuring performance, with little or no appreciation of the soft skills. If you are serving clients as an agency or freelancer, you should be measuring communication.

For example, when was the last time the client got in touch and what was the sentiment? Measure that, but also act on it too. If things have been silent for 30 days, then you should sound the alarm and get proactive!"

Ed Leake, Founder at God Tier Ads & The Agency Forge

5.2.2 For in-house teams

For in-house teams, we see a very similar frequency for the most common goals. Obviously, none of the client-related goals apply here.

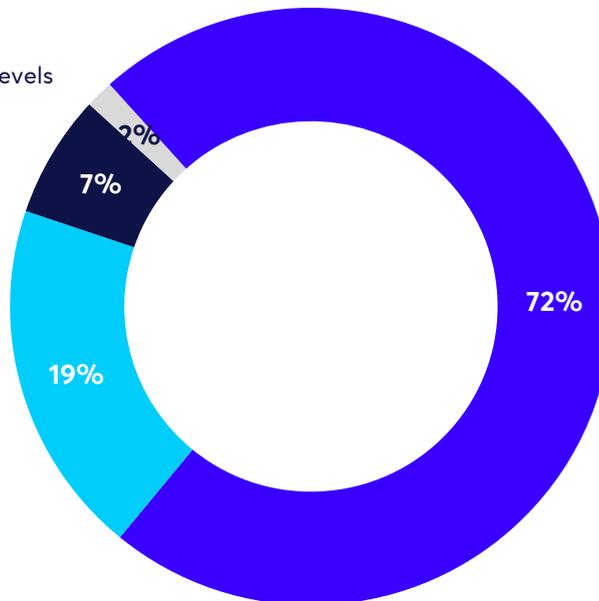
Profit
Increase Campaign Volume
Meet Expectations
Increase Campaign Efficiency
Employee Satisfaction
Revenue Growth

5.3 The most likely goal for PPC campaigns in 2024

Decrease spend:
decrease budget while keeping volume at the highest possible levels

Aggressive growth:
grow volume and accept a worse efficiency to allow for this growth

Improve efficiency:
try to get more volume out of the same budget



Efficient growth:
grow volume but only if efficiency targets are met

n=1,131

A substantial majority of 72% picked efficient growth as their most likely goal for 2024. This means they're allowed to increase spend as long as their efficiency targets (such as ROAS or CPA) are met.

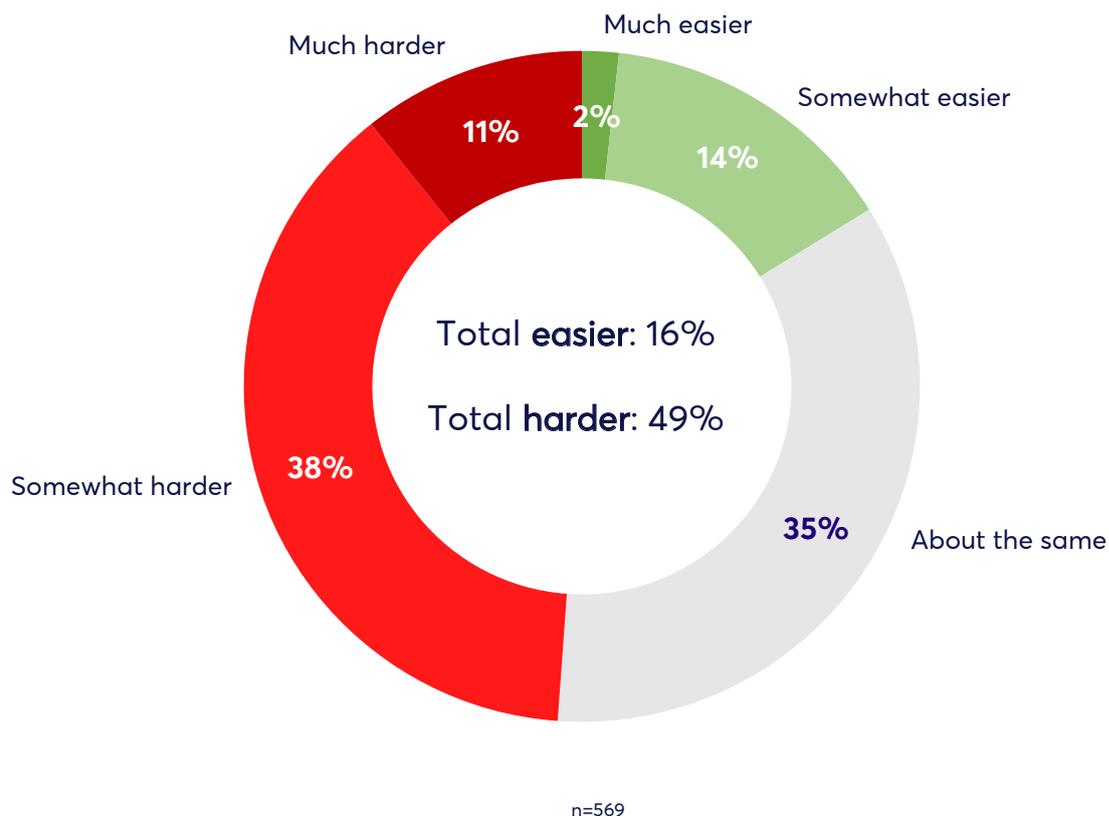
If you combine that with the "Improve efficiency" results, more than 90% say that their 2024 PPC goal is around efficiency rather than the more aggressive "growth at all costs." Key priorities for PPC practitioners will likely include reducing wasted spend, building safeguards through layers of automation, and optimizing performance from outside the ad accounts (e.g. landing pages).

For the nearly one in five that need to improve efficiency, it means there's no room for more ad budget, so they will need to find ways to get more volume out of the same budget.

Finally, just 2% expect they'll need to decrease spend for most of their PPC campaigns.

5.4 Is managing PPC campaigns harder or easier than two years ago?

We asked individual contributors and freelancers with at least two years of experience if they thought managing PPC campaigns was easier, harder, or about the same vs. two years ago.



Nearly half of specialists think it has become harder than two years ago, 16% think it's easier now, and 35% consider it about the same. For those who answered that it has become easier or harder, we asked them to clarify why in a few words. We'll dive into their responses next.

5.4.1 Why 16% think it's easier now

If respondents answered managing PPC has become easier, we asked an open-ended follow up question to explain why.

Tools **AI/ML**
Automation
Performance Max
Automated Bidding

We split out the themes above, but essentially, they all come down to the same thing: thanks to increased automation (including AI, ML, Smart Bidding, Pmax, and third-party tools), it's easier to get started with advertising and less time is needed for manual optimization.

5.4.2 Why 49% think it's harder now

In a similar fashion, we asked respondents who answered it became harder to explain why.

GA4
Automation
Decreased Control
Increased Competition
Decreased Insights
Performance Max Tracking
Automated Bidding
Privacy

To illustrate some of the themes in the word cloud, we clarified them in the table below based on our respondents' comments.

Theme	Examples/clarification
Decreased insights	Google hiding data, less data to work with, black box campaign types
Decreased control	Automated bidding, Performance max, exact match becoming increasingly looser
Increased competition	More competitors in the auction, rising CPCs leading to worse efficiency (CPA/ROAS)
Tracking	Implementing optimal tracking became more complex; attribution is harder
Automation	Automation is leveling the playing field
Privacy	GDPR, iOS, third-party cookies going away, consent, all making it harder to track campaign results

The number one reason why 49% of practitioners say managing PPC has become harder is the loss of insights and data due to automated campaigns (like Pmax). Not getting all the search term data is a common complaint here. It's hard to act on data you don't have or don't have control over.

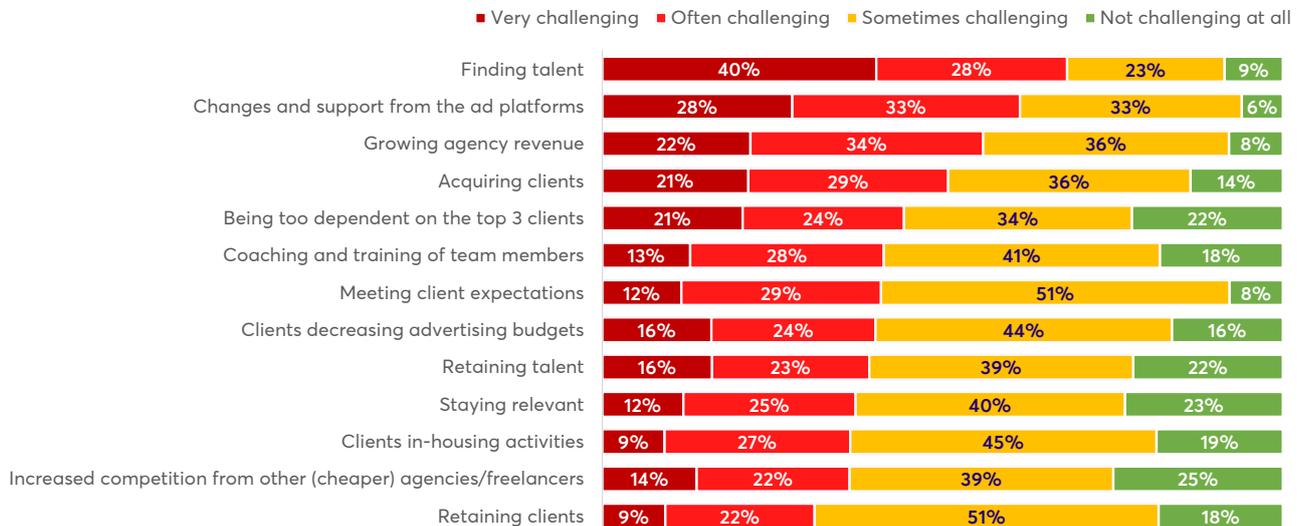
This also explains the popularity of scripts that help bring back visibility into this obfuscated data.

Increased competition and corresponding rising CPCs are a close second. Many advertisers experience they're spending more without getting more.

Finally, all the changes around tracking, privacy, and attribution make it increasingly hard to measure the success of your campaigns.

5.5 Agency challenges

We asked our agency and freelance respondents to rate how challenging each of the following is for them.



n=818

Finding talent is clearly the biggest challenge for agencies, with 68% rating this as (very) challenging. Second place goes to “Changes and support from the ad platforms,” which we see reflected in other parts of this report.

This also aligns with recent complaints about the declining support quality from Google, as covered by Search Engine Land in January 2024: [Google Ads support is at an 'all-time low,'](#) and [Google advertisers are confused between support and sales.](#)

Hiring is tough. You need to put the odds of finding the right candidate in your favor. First, your application form should contain a question (or two) about personality traits, for example: ‘Who is your favorite comedian?’ This is a simple way to see if you will gel or not. Next, plan to hire ahead of schedule and give yourself plenty of time to find the right candidate. If you rush hiring, you generally fail at hiring. Finally, avoid trying to find those broad-skilled unicorns. You should hire for a particular weak point or blind spot you have because the right candidate can learn the rest as they progress.

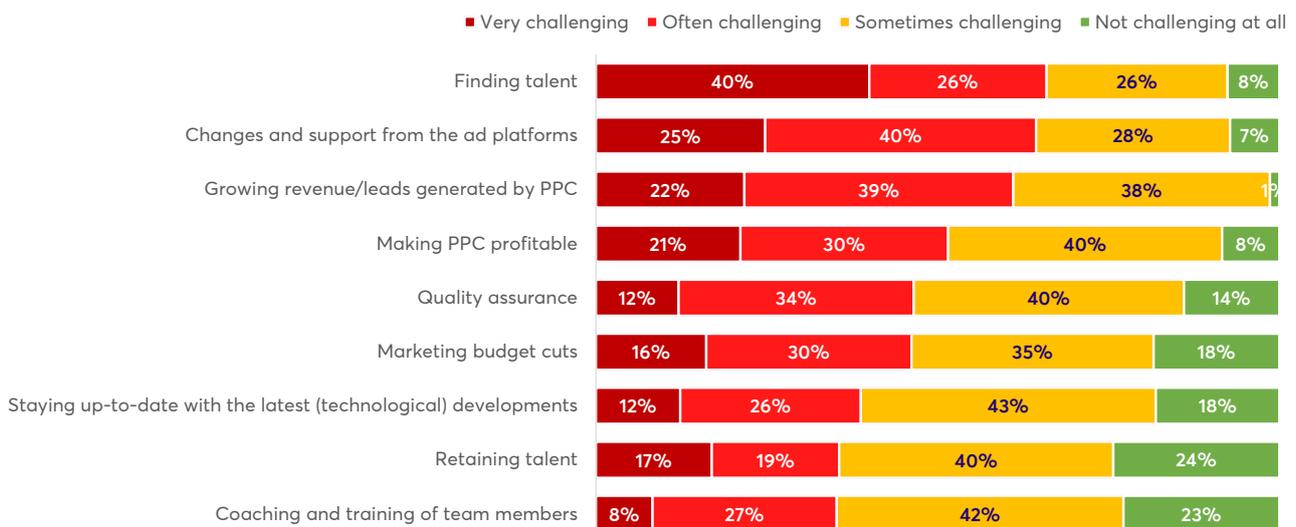
We found the following significant outliers when diving deeper into different agency segments:

- ◆ A larger percentage of agencies managing between \$5K and \$50K/mo find it “Very challenging” to grow agency revenue (33% vs. the 22% average).
- ◆ Agencies managing more than \$3M/mo find themselves much less dependent on their top clients (7% vs. the 21% average).
- ◆ Retaining talent is a significantly greater challenge for agencies in Continental Europe, where 57% find this (very) challenging.

- ◆ At the same time, this is significantly less challenging for agencies in North America. 34% say it's not challenging at all vs. the 22% average, and just 6% say it's very challenging vs. the 16% average.
- ◆ Finding talent is also less challenging for agencies in North America, with just 29% rating this as very challenging, vs. the 40% average.
- ◆ Finally, European agencies also have a harder time with "Staying relevant" compared to their North American counterparts. Just 16% of European agencies say this is not challenging at all, while 32% of North American agencies consider this not challenging.

5.6 In-house challenges

For in-house teams, we see the exact same top two challenges as with agencies: finding talent and dealing with the changes and (low-quality) support from the ad platforms.



n=227

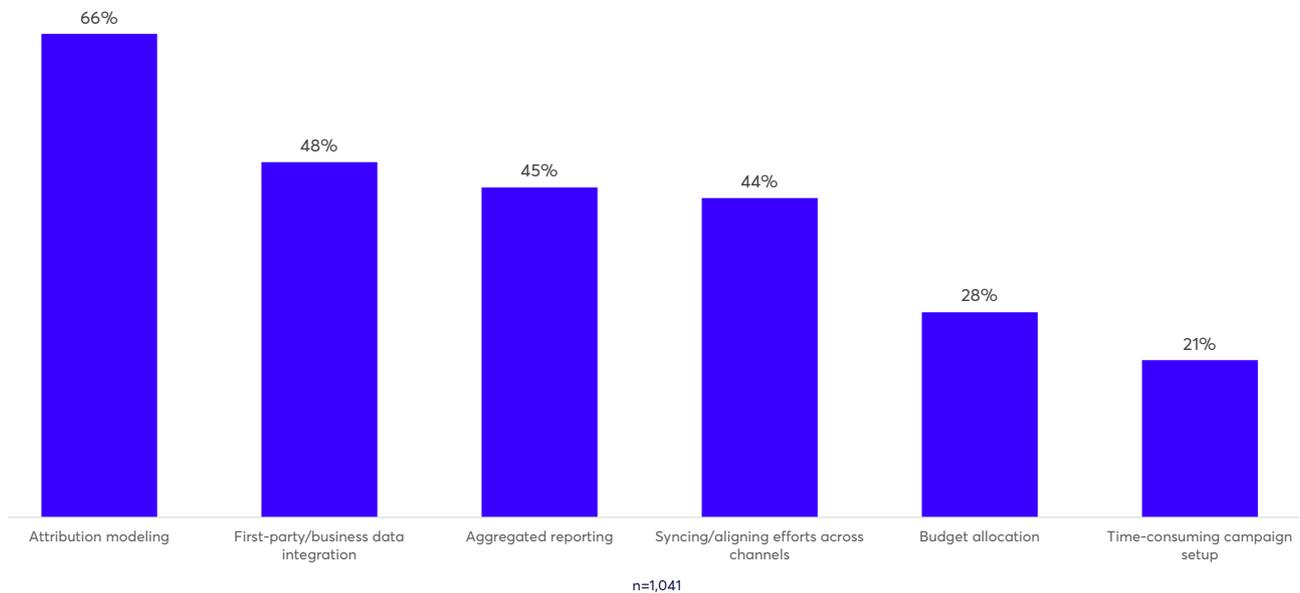
It might seem counterintuitive that in an age of increased automation and machine power, the biggest challenge right now is finding qualified talent. And yet that is exactly the predicament reported in this survey. Respondents also claim that retaining talent is not hard at the moment, suggesting a market dynamic where talent is sitting tight, contributing to limited options for those seeking staff.

Another interesting pair is the two-fold dilemma of growing revenue and making paid acquisition profitable. Efficient scale is a long-standing challenge, yet in the current economic climate, the profitability part of this equation is facing more scrutiny. This dilemma is not resolved by the platform technology alone.

Interestingly enough, we didn't find significant differences between in-house teams when segmenting them by region or spend level.

5.7 Challenges with multi-channel advertising

We asked our respondents to choose up to three of their biggest challenges regarding advertising across multiple channels. This question was optional, but still, 92% answered it.



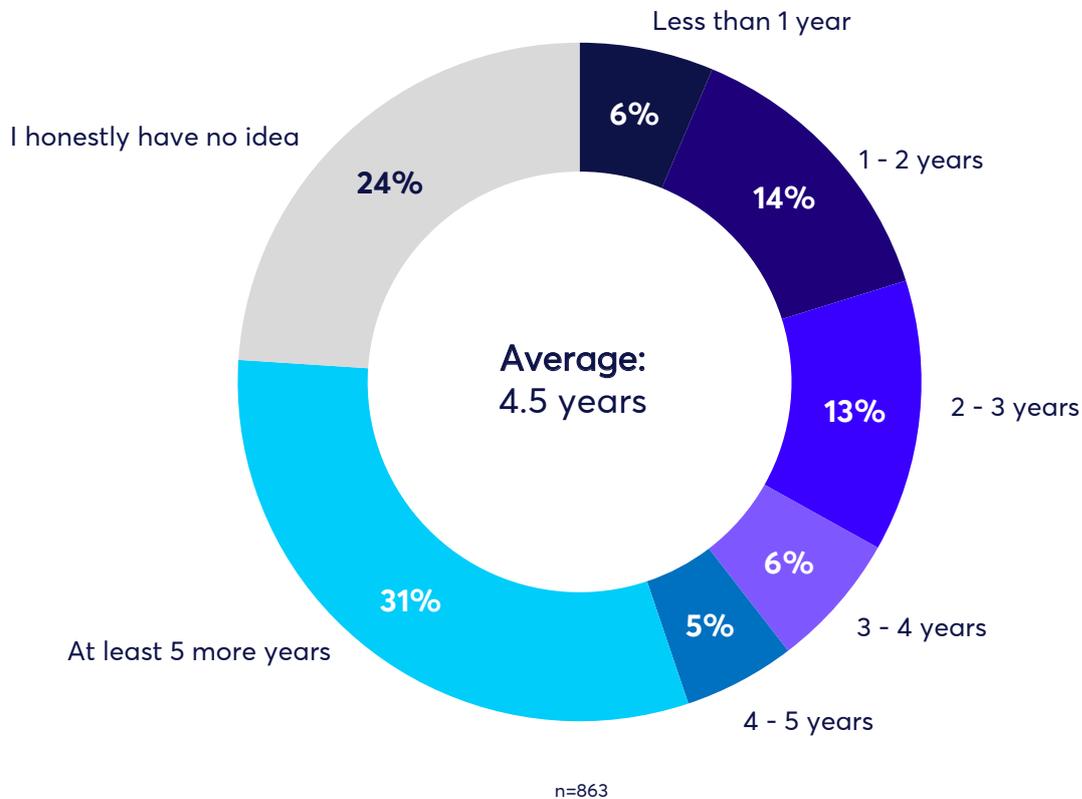
Reconciling paid media efforts across different ad platforms remains a challenge, with two-thirds of our respondents citing attribution as a particular hurdle. Also on their radar are using first-party data and building a cohesive strategy, which indicates that digital marketers everywhere are focused on privacy and user experience. As the digital playground grows more siloed, cross-platform reporting and collaboration will likely play a larger role in securing buy-in and budget.

For budget allocation, we saw some interesting outliers. On average, it was selected by 28% of our respondents, but the following segments found budget allocation more challenging:

- ◆ It was the most challenging part for people with less than one year of experience: 62% of this audience selected it.
- ◆ The same goes for monthly spends below \$5K: 54% of this audience selected budget allocation as one of their top three challenges.

5.8 Expected tenure at current company

We asked all respondents how long they expect to keep working at their current company.



The answers get especially interesting when segmented by the years of relevant working experience:

- ◆ People with two to five years of experience are least likely to stay at least five more years at their current company (20% vs. the 31% average).
- ◆ While people with more than ten years of experience are most likely to stay five more years at their current company (45%).

If you are a business owner or leader, ask yourself: What would you do if your best-performing team member left tomorrow? That question should keep you up at night, and yes, you should be planning for it. Be proactive and consider a) what is the least enjoyable part of their job and b) how can you remove or replace that for them?

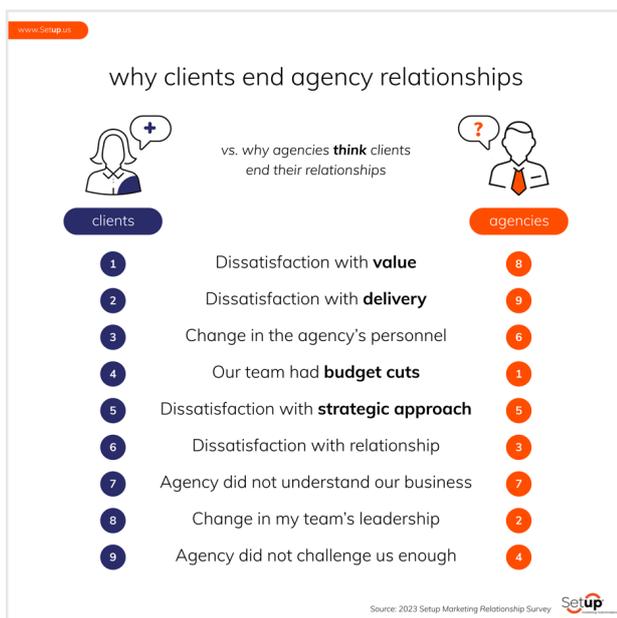
Likewise, as the employee you need to be thinking the same and working with your boss to improve your situation. It is a two-way street.

6. The agency-client relationship

In this chapter, it's all about the dynamic between agencies and their clients. We would have loved to share data from both sides of the table, but as mentioned above, we didn't receive enough responses from brands hiring agencies for solid benchmarks from their side.

Luckily, marketing matchmaker Setup does a great job covering both sides of this relationship with their yearly [Marketing Relationship Survey](#).

That survey covers agencies delivering all sorts of marketing services (content, design, PR, etc.), not just paid media. Nevertheless, PPC agencies and their clients should note insights like the one below.



Every year, they find a massive disconnect between why clients end the relationship (dissatisfaction with value and delivery) and why agencies think the relationship ended (budget cuts and change in leadership). This is a great (but dangerous) example of agencies exhibiting self-serving bias.

The rest of this chapter will focus on what our 851 PPC agency and freelancer respondents shared about this relationship.

6.1 Challenges with the agency-client relationship

In the word cloud below, you'll find the most common themes we found when asking agencies and freelancers the open-ended question, "What's your number 1 challenge with the agency-client relationship?"

Lack of Data

Client Education

Time Management Building Trust

Expectation Management

Client Satisfaction

Communication

Budgets Client Retention

Client Acquisition

To illustrate some of the themes in the word cloud, we clarified them in the table below, based on our respondents' comments.

Theme	Examples/clarification
Client education	Explaining to clients how things work and what to expect
Client satisfaction	Meeting the client's expectations, making/keeping them happy
Time management	Scope creep, resource planning, having enough capacity to serve all clients
Expectation management	Managing the often unrealistic client expectations
Lack of data	Not having access to all relevant client data
Communication	Finding the right meeting cadence, getting on the same page, reporting, getting clients to respond
Budgets	Budgets not matching the expectations, budget cuts

Expectation management is the clear number 1 challenge in this relationship. Agencies are having a hard time dealing with and meeting the expectations of their clients.



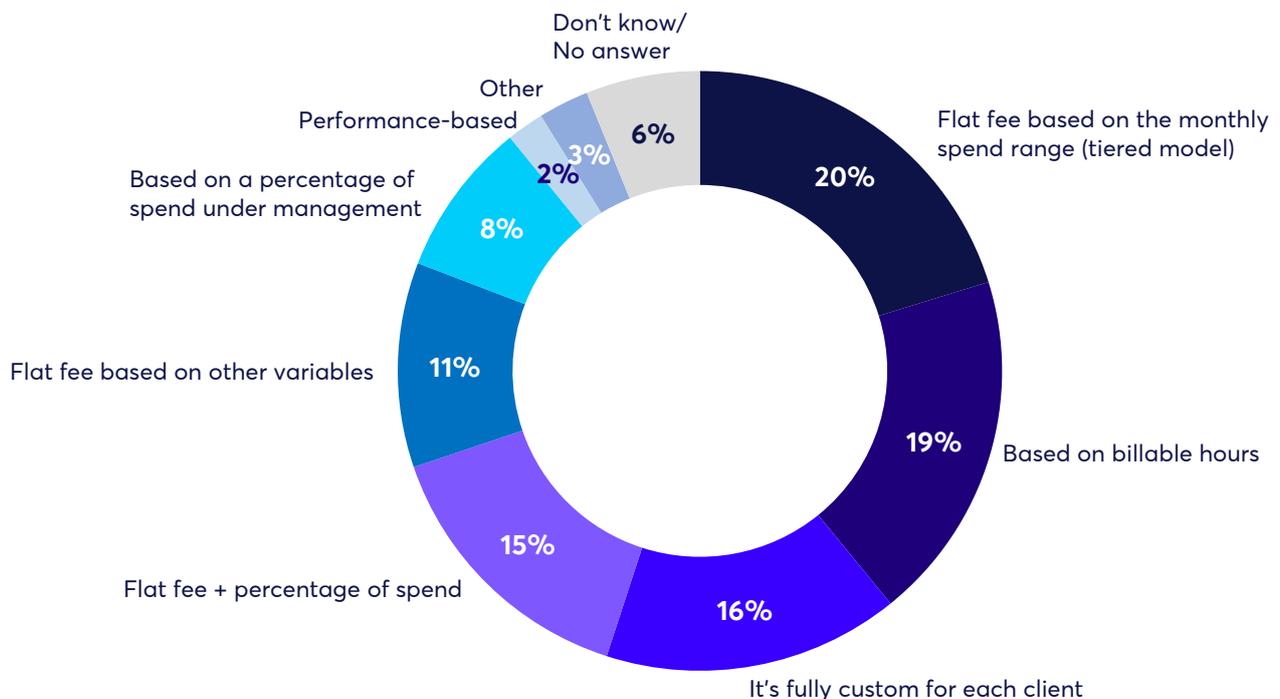
"Mastering the client-agency relationship entails managing expectations and being transparent with reporting and communication. Regular, insightful reports demonstrating progress, highlighting successes, and addressing setbacks help foster transparency and trust.

Coupled with a commitment to accountability — taking ownership of results and proactively addressing concerns — agencies can solidify their position as reliable partners dedicated to driving mutual success."

Jeroen Maljers, Founder & CEO at Swydo

6.2 Agency pricing models for ongoing PPC management

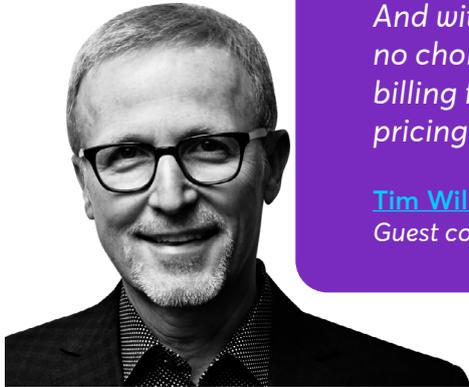
We asked our agency respondents for their most common pricing model for ongoing PPC management. Not for the one-off projects or custom requests but for the very mature, quite predictable, bread-and-butter type of work their team has been doing for years.



n=851

When it comes to pricing, we see just one significant difference between agency segments:

Billable hours are much less common in North America (11% vs. the 19% average), while it's much more common in Continental Europe, with 28% of agencies selling ongoing PPC management by the hour.



"Especially for agencies who provide the type of tangible value created by PPC programs, simply billing for time is a wildly suboptimal way to capture the value created for clients.

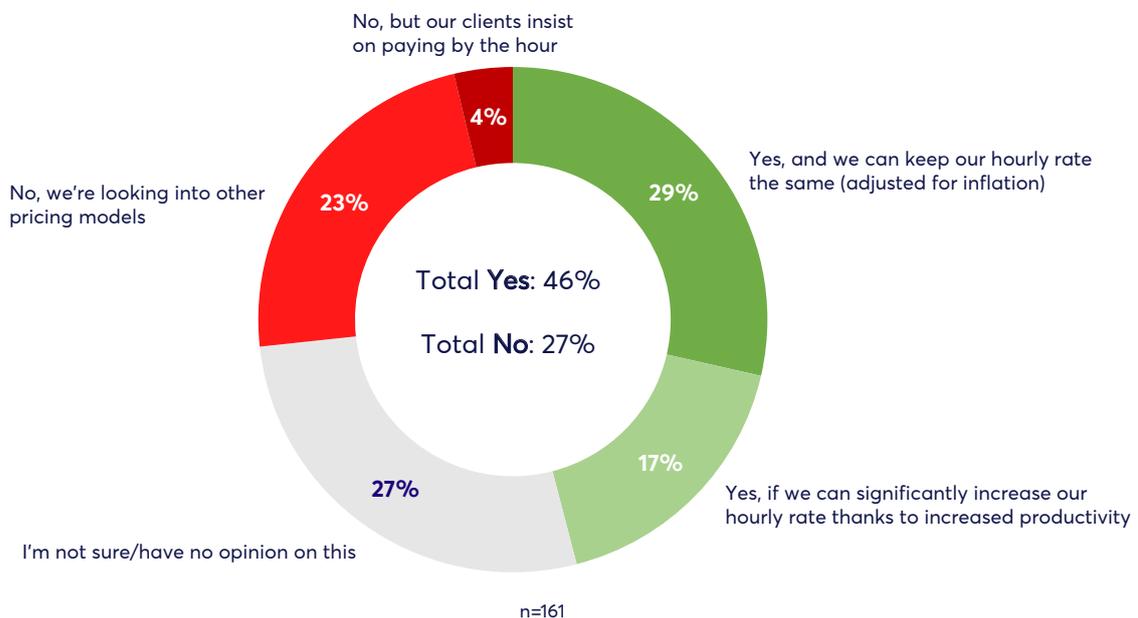
A subscription model — various levels of solution sets — is the modern way to price these types of services and is being used not only by agencies but by virtually all kinds of professional service firms, from law to accounting to IT consulting.

And with the widespread adoption of AI, agencies will have no choice but to migrate away from the outmoded concept of billing for time, which is completely losing its relevance as a pricing model."

Tim Williams, founding partner at Ignition Consulting Group
Guest commenter

6.3 Viability of billable hours with AI and automation

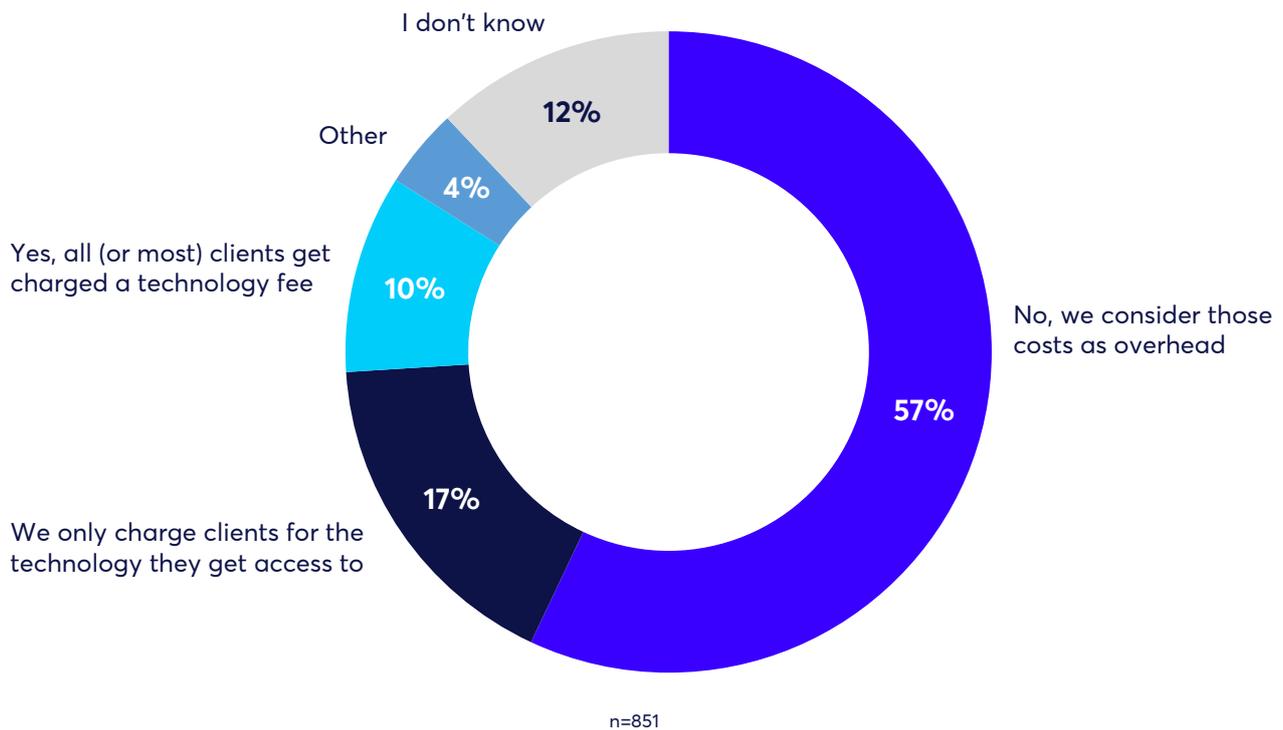
If a respondent selected "billable hours" as their primary pricing model, they got this follow-up question: "Do you believe billable hours is a future-proof pricing model, given the rise of automation and AI?"



Surprisingly enough, 46% of this group believes the billable hour is future-proof. We're curious to see how this will change in the coming years.

6.4 How agencies charge for software used on their client's behalf

As we'll see in Chapter 8, PPC professionals use a wide range of tools in their work. We wanted to know how agencies handle these costs and asked the following question: "Does your agency charge clients for the PPC software you(r team) use(s)?"



Most agencies treat these costs as overhead. Agencies that manage more than \$3M/mo are more likely to charge all their clients a "technology fee," 19% vs. the 10% average.

Treating these costs as overhead is an appropriate solution for technology used in more or less the same way for all your clients and for all pricing models except hourly billing. For example, if the agency charges a flat fee for a clearly defined deliverable and, thanks to the technology it bought, it can deliver the same work faster (or better), this investment pays off quickly for the agency. And the client gets a better result faster, making it a win-win situation.

Respondents who selected "Other" commented that it depended on the type of technology. For example, a reporting solution was an agency cost (overhead), while clients pay (directly) for tech that's dedicated to their accounts such as feed management, call tracking, custom builds, and Search Ads 360.



"If agencies charge their clients by the hour and pay for technology, they're being punished twice.

First, their costs go up - not just for buying the tech, but also for the time needed to learn and implement it. Normally, this should be an investment with a positive ROI.

However, as they're billing for time (and all technology aims to save time), their revenue per client should go down, assuming they pass on the time savings to their clients.

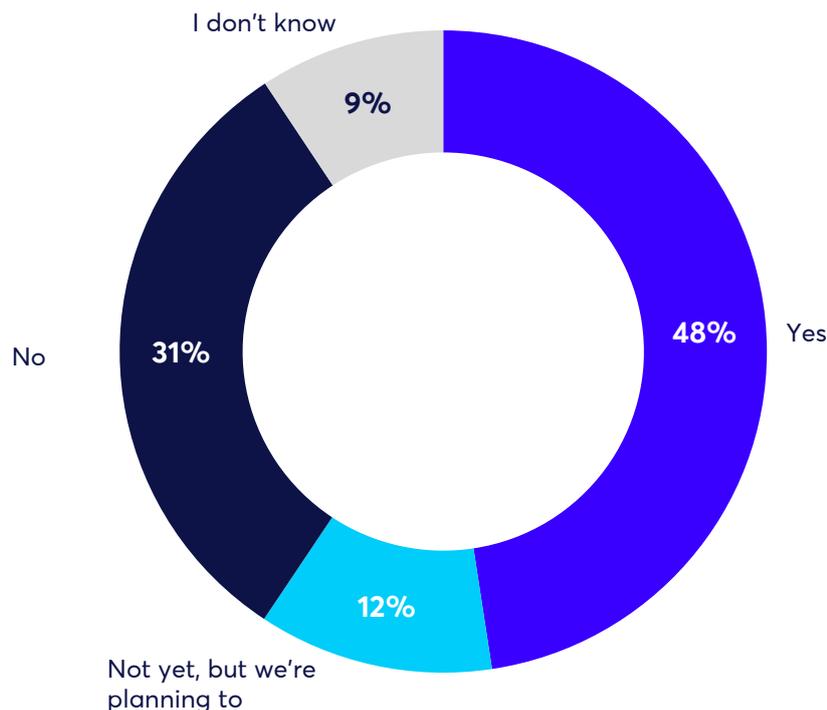
This combination is deadly for agency profitability, and it will make them resist investing in technology, which is also deadly in this age.

The solution? Either let the clients (partly) pay for the technology or switch to any pricing model other than billing by the hour.

Wijnand Meijer, co-founder & CEO at TrueClicks

6.5 Agencies offering services to in-house teams

We asked our agency respondents if they offer products or services to brands that manage PPC in-house.

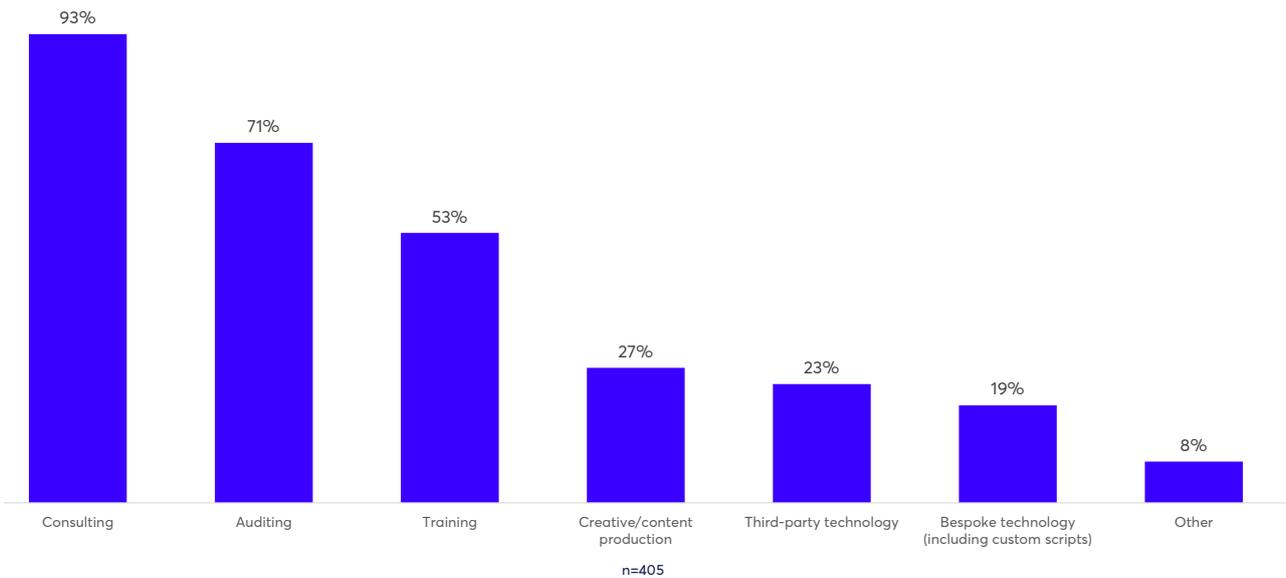


n=851

Nearly half of agencies already do, and another 12% are planning to. Working with in-house teams is a potential new area of revenue generation for agencies, but it does not come without risks. The allure of cash flow can distract you from the additional work that might be out of scope for your typical arrangement. Consulting requires a different approach to ad account management. Before jumping on the in-house servicing bandwagon, consider if you are well-positioned to resource this type of work.

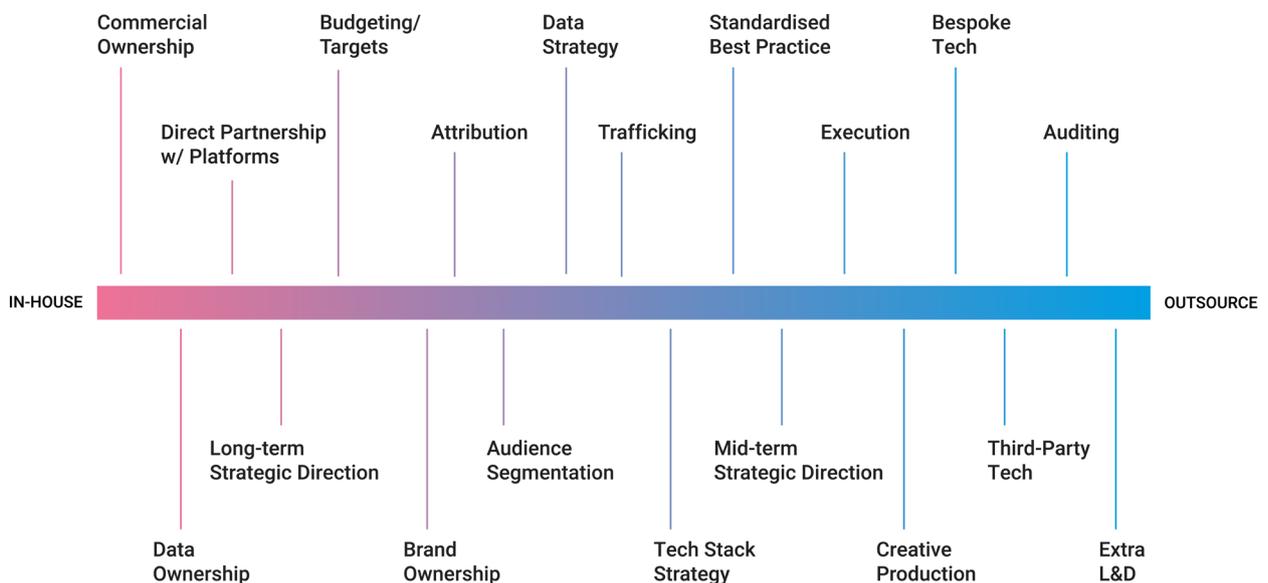
Agencies managing more than \$3M/mo were more likely to offer services to in-house teams: 64% vs. the 48% average.

For the agencies that answered "Yes" to this question, we asked the follow-up question: Which services (or products) do you offer to brands that do PPC in-house?



The answers nicely align with the timeless spectrum Daniel Gilbert shared back in 2019 in his Campaign article [In-house or agency? It's not a binary decision](#). We shared it in our first report, but believe it deserves to be shared again.

The Anatomy of In-Housing



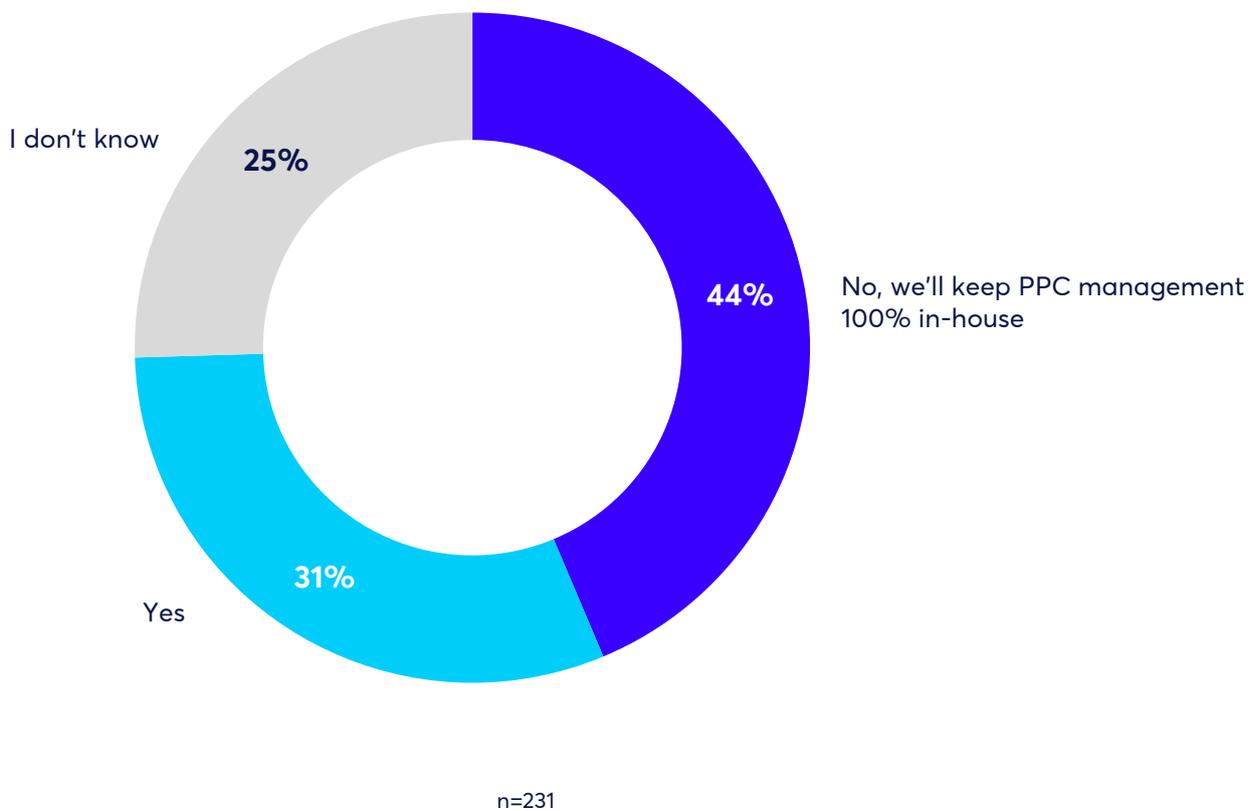
Clients (brands) should in-house most of the activities on the left-hand side of this spectrum, such as data ownership, partnership with the platforms, budgeting, long-term strategy, and brand ownership.

On the other hand, they're better off outsourcing activities like third-party/bespoke technology, learning & development, and auditing. For the activities in the middle, it depends on the advertiser's goals, budget, and in-house capabilities.

6.6 Are in-house teams considering external help?

We asked respondents working in-house if they were considering outsourcing any PPC activities to an agency or freelancer in the coming 12 months. With nearly half of in-house teams not in-market for agency services, it reinforces the strategy above for agencies to look for ways to offer services to in-house teams. It becomes then a matter of interpretation: how committed is the "100% in-house" answered by these respondents? Are narrowly scoped projects like consulting, audits, and training sufficiently attractive and non-invasive to woo these businesses?

Meanwhile, 1 in 3 respondents are in-market for agency services, and 1 in 4 are unsure. Considering the size of the market, the glass may indeed be half full for agencies.

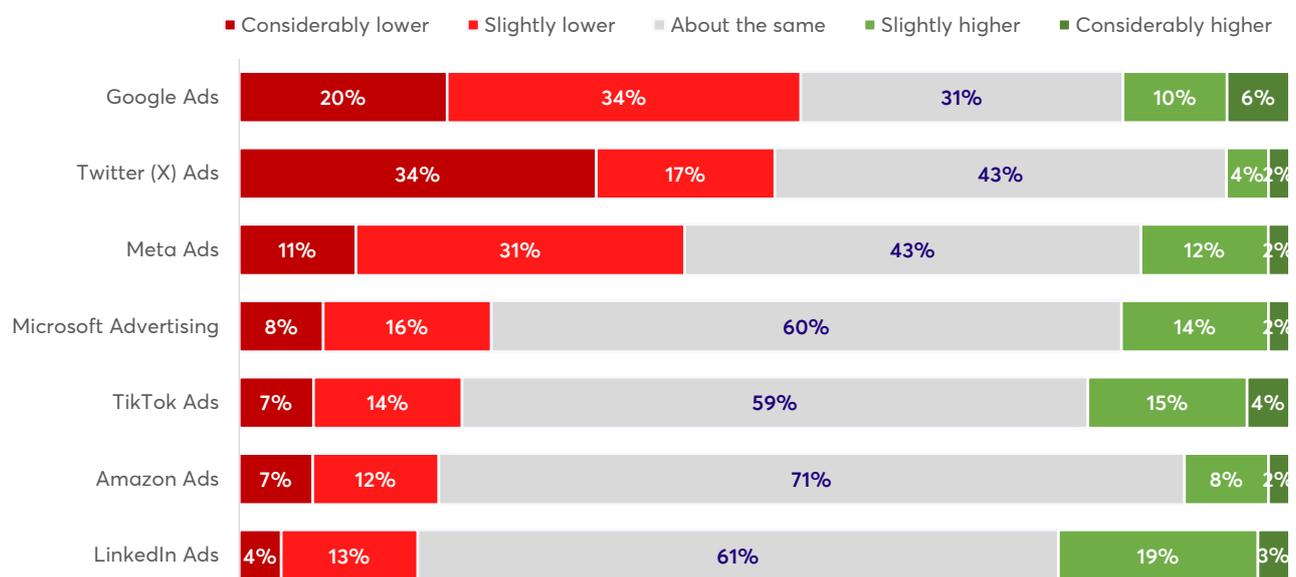


7. PPC Platforms and Management

7.1 Change in the level of trust in the ad platforms

We asked all our respondents how their level of trust in the ad platforms has changed compared to a year before. Answering this for at least one platform was mandatory while answering for additional platforms was optional. Each platform got at least 694 responses.

To clarify the word "trust," we added the following sentence to the question: *By trust, we mean the trust that is earned by being as transparent as possible and keeping the users' and advertisers' best interests in mind.*



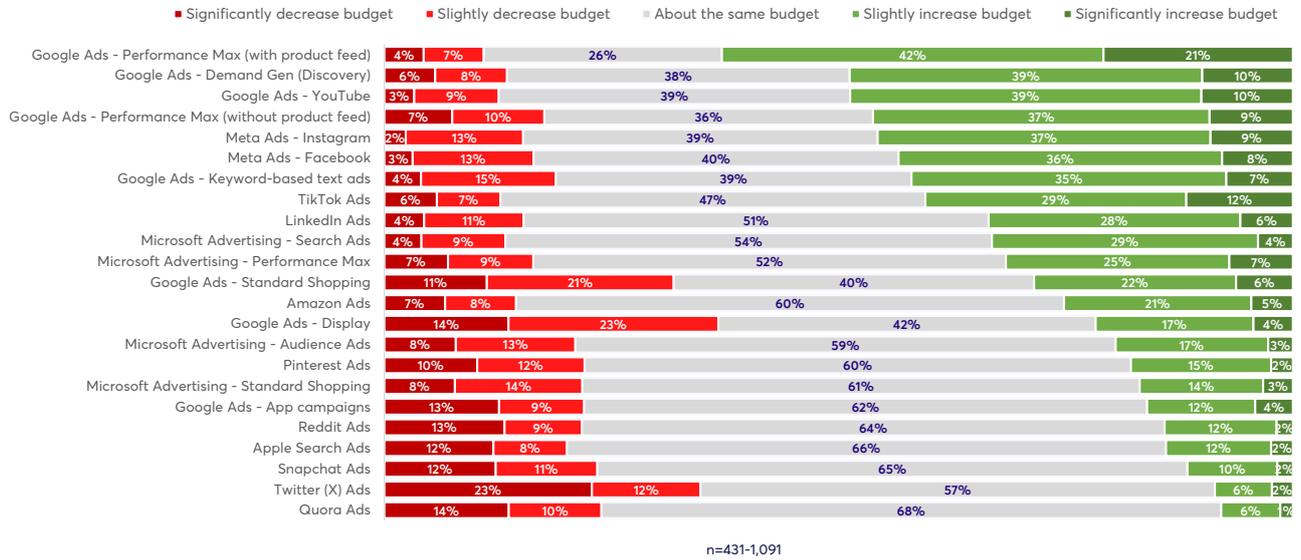
n=694-1,116

As we can see in the graph above, trust in ad platforms has taken a hit in the past year, with only LinkedIn recording a net positive sentiment. Google (54%), Twitter (51%) and Meta (42%) recorded the largest deficits in trust. All three platforms have been struggling with issues such as trading user control for platform-side automation, reputation damage, presence of unwanted content, and general unreliability. While this is a transitional period for digital advertising, our respondents were clear: platforms can do more to keep advertisers and agencies informed and feeling valued.

- ◆ Interestingly enough, respondents from South & Southeast Asia and advertisers hiring an agency were much more trusting in Google than the average. Respectively 41% and 35% of these audiences said their level of trust in Google Ads increased (vs. the 16% average).
- ◆ On the other hand, respondents with at least ten years of working experience were much less trusting of Google Ads: 63% said their level of trust decreased vs. the 54% average.

7.2 Segmented budget expectation for 2024

We also asked all our respondents about their expectations for budget increases or decreases in 2024. Answering this for at least one platform (or campaign type) was mandatory, while additional ones were optional.



Advertising budgets are mostly on the rise, with 12 out of 23 campaign types anticipating increases, particularly on Google Ads and Meta platforms. Notably, PPCers are planning for increased spending towards campaigns targeting 'ready to buy' prospects at the bottom of the purchase funnel.

The top choice for increased budget allocation is Google's product feed-based Performance Max ads campaign, selected by 63% of experts. Over half of respondents across diverse company models — Agencies, In-house, Advertisers hiring an agency, or Freelancers — plan to amplify spending on feed-based Pmax in 2024.

This underlines that no matter the business type, PPCers find it profitable to invest in automated campaigns, which a high-quality product data feed can precisely target.

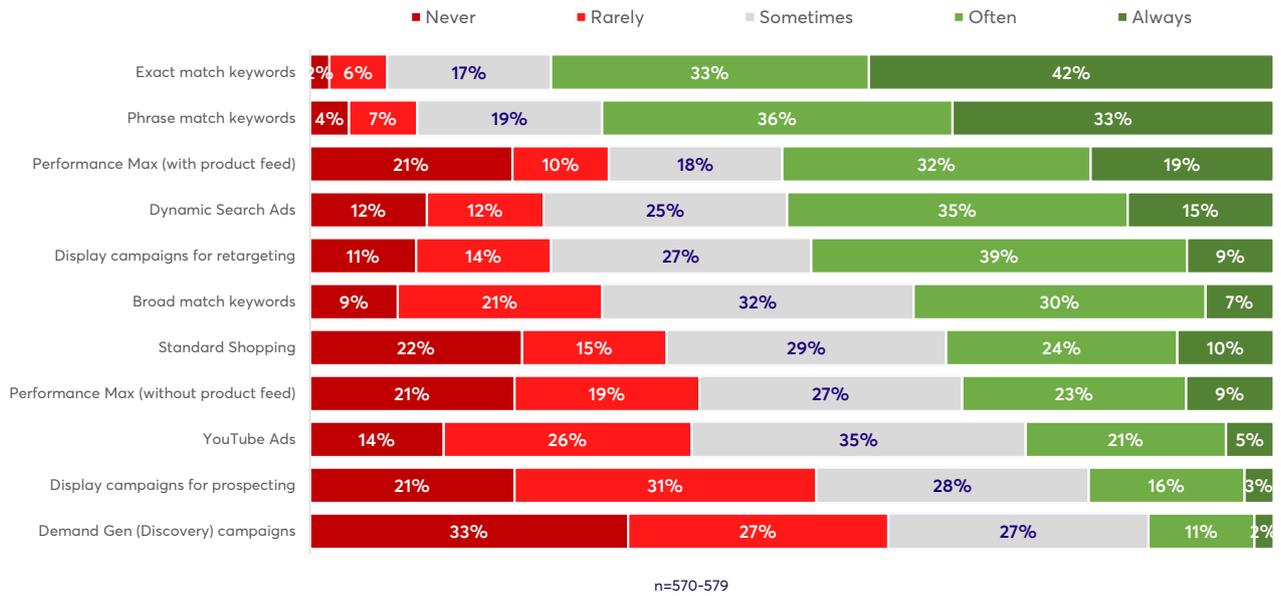
On the other side of the spectrum, over one-third of advertisers running Google Display and Twitter (X) ads are planning to decrease their spending on these ToFu and MoFu channels. Twitter (X), in particular, may see significant budget cuts, with 23% expecting substantial decreases.

7.3 Google Ads feature adoption

We asked the individual contributors who manage paid search how often they use different Google Ads features and grouped these features into the following categories:

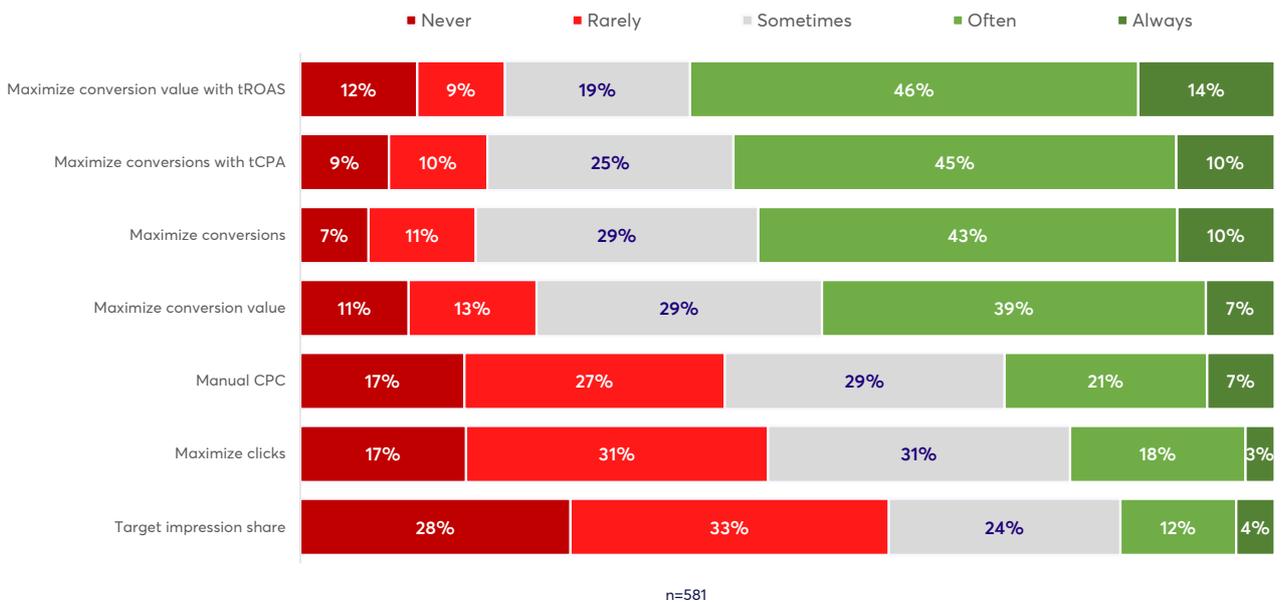
- ◆ Targeting options & campaign types
- ◆ Bid strategies
- ◆ Additional tools & features

7.3.1 Targeting options & campaign types



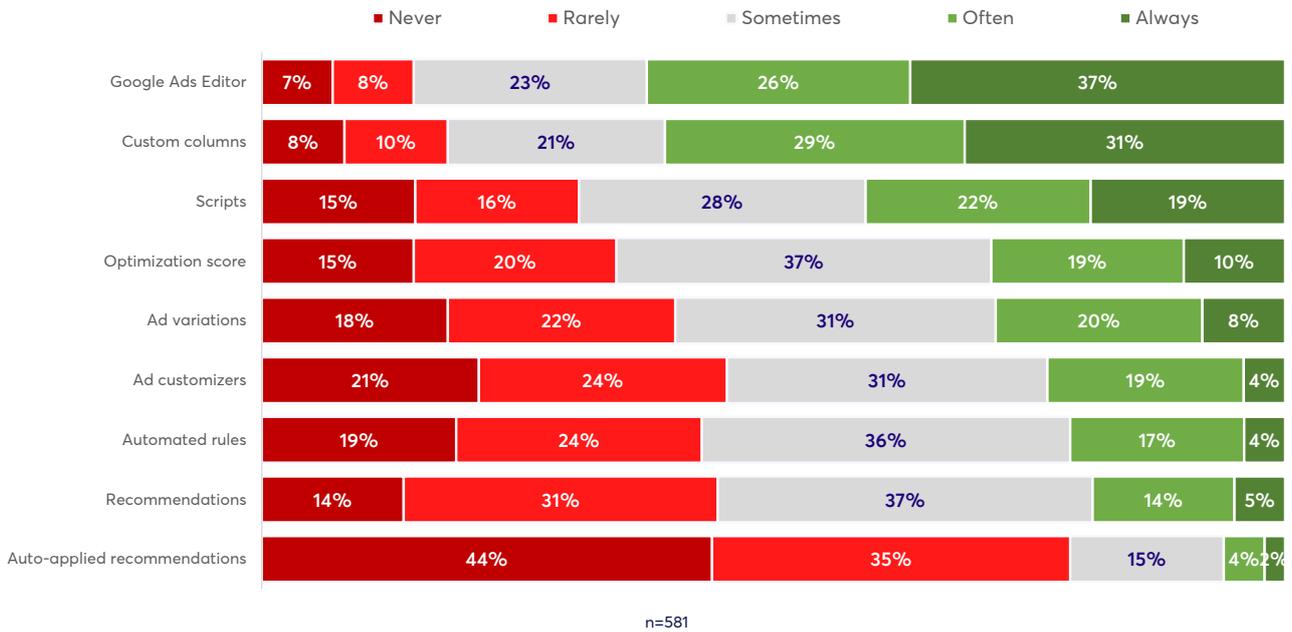
Exact match is as popular as ever (take note, Google), whereas the new Demand Gen feature has yet to take hold. This is because most ad accounts can benefit from using exact match, whereas a much smaller portion of advertisers require expansion beyond Google Search. Performance Max (with feed) is now being used more often than Standard shopping, but the old guard, with nearly a third of votes, still has its fans and use cases.

7.3.2 Bid strategies



The adoption of automated bid strategies is now the standard for most advertisers. Manual bidding still holds on but is overshadowed by the automation powers of tROAS and tCPA. Target impression share bidding might be last on the list, as it has its place for specific strategies such as brand protection, but it is not widely used outside of that.

7.3.3 Additional tools & features



From the additional tools and features, we see “the classics” populating the Top 3: the Editor, custom columns, and scripts. Number 1 helps you make changes in bulk, and numbers 2 and 3 let you customize your reporting and optimization.

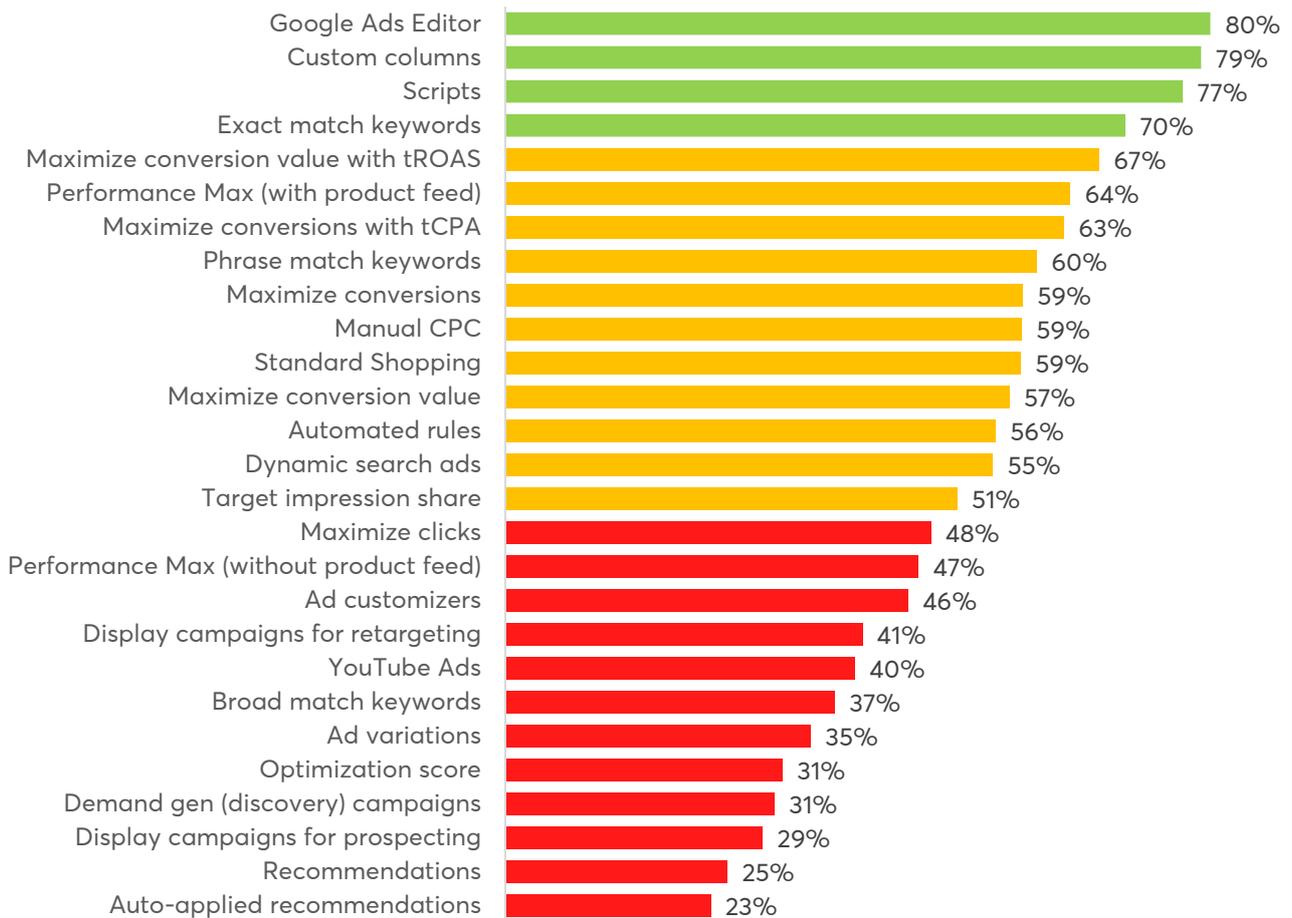
There’s not much difference in adoption between number 4 (Optimization Score) and 8 (Recommendations), but it’s very clear what the least popular feature is on this list: auto-applied recommendations. A staggering 79% of respondents said they never or rarely use this feature.

That doesn’t surprise us as much, but we were surprised to see useful and customizable features such as ad variations, ad customizers and automated rules having a relatively low adoption rate.

7.4 Google Ads feature satisfaction

For each of the Google Ads features respondents said they used sometimes, often, or always, we asked, “How satisfied are you with the results (or usefulness) of {insert feature}, on average?”.

Just like with a customer satisfaction (CSAT) score, the percentages below are the sum of the percentages of respondents who answered “Satisfied” and “Very satisfied”. The remaining answers were neutral or (very) unsatisfied.



n=120-528

Are PPC specialists set in their ways, or are the newer features simply not up to the task yet? Perhaps there is a little bit of both here. The manual control tools and features sit at the top of the list, with the satisfaction in Google’s automated suggestion features sitting plumb last. One thing is clear - paid search practitioners still enjoy a level of control, and some of the automations lack the sophistication to be fully adopted.

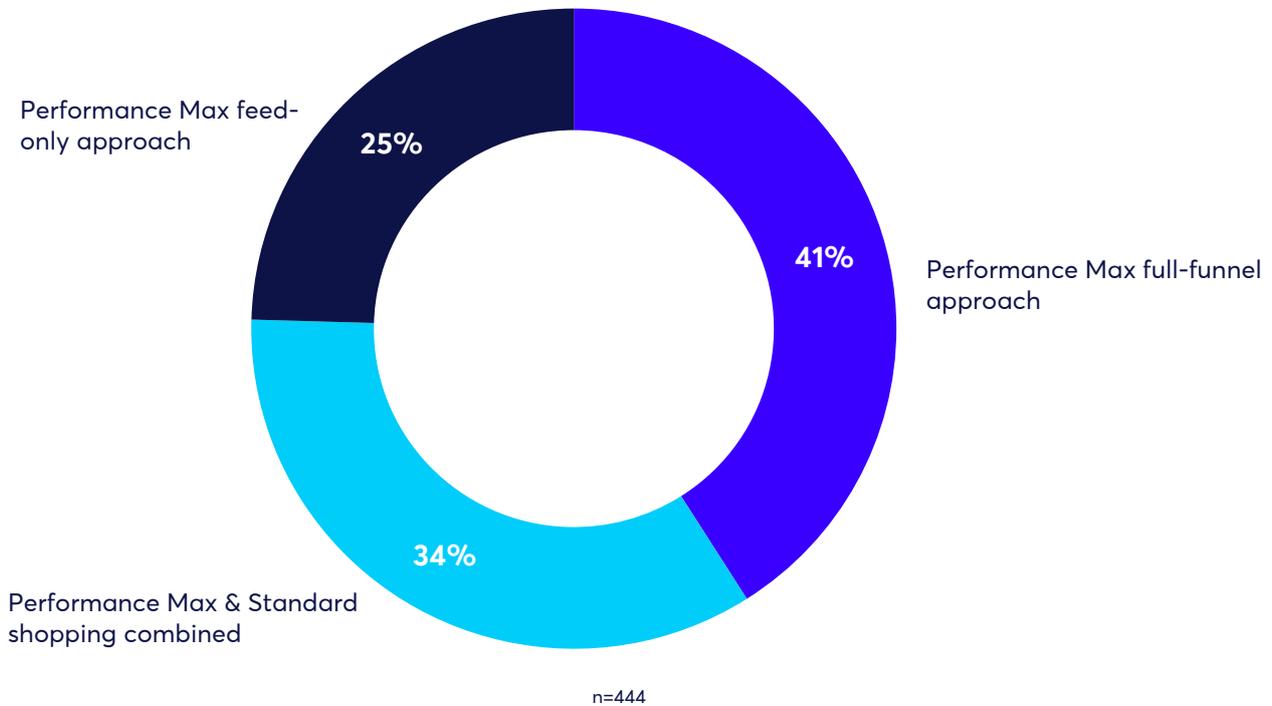
We also see another interesting correlation here that appears again later in this report with respect to using AI: the more often our respondents use a feature, the more likely it is they’ll be satisfied by the results.

So, for some genuinely useful features like ad customizers and ad variations, it’s probably a matter of learning how to get the most out of them by using them more often. For other features, the initial dissatisfaction could have led to low adoption.

We saw just one significant outlier in the satisfaction levels for Google Ads features. 27% of South & Southeast Asian respondents are very satisfied with auto-applied recommendations, compared to the 2% average. This aligns with the higher level of trust in Google in this region we saw earlier.

7.5 Performance Max

7.5.1 Performance Max campaign structure



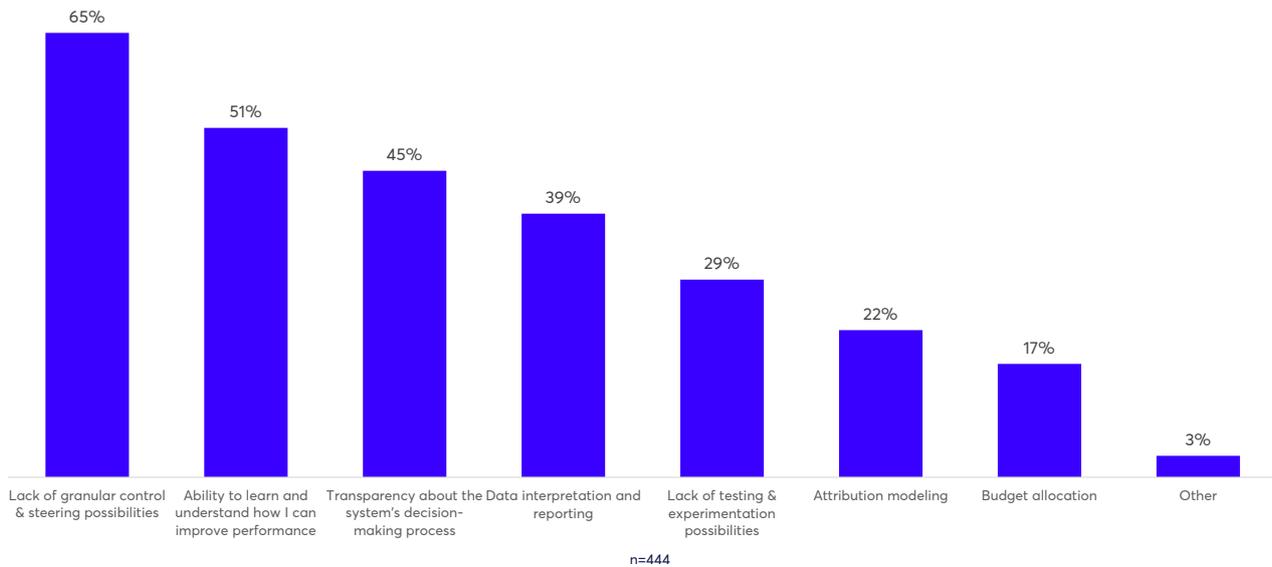
While overall adoption of Performance Max campaigns is high, the way this technology is applied varies significantly, and it is not always used “as intended.”

In fact, less than half of respondents use a dedicated full-funnel approach, which means the inclusion of assets needed for placements like YouTube and elsewhere. Motivations can vary; for example, some advertisers might struggle to supply the needed assets. Google aims to remedy this pain using generative AI and other auto-created assets.

Others, however, might purposely deny Google the needed assets to achieve a campaign build more similar to now-deprecated Smart Shopping campaigns. With one in four respondents using feed-only builds and a significant one in three combining Performance Max with Standard Shopping, Google’s product teams have certainly taken note. Starting with ads for YouTube Shorts, Performance Max has already begun serving video placements based on the product feed alone. This trend can be expected to continue.

7.5.2 Performance Max challenges

We asked practitioners who manage Pmax campaigns to select the biggest challenges (up to three) they’re facing with this campaign type. The lack of control is the clear number one challenge



"This survey reveals concerns about transparency and control, which are not new to PMax. Yet, with a new category of AI blooming before our eyes, we're forcefully reminded that black box technology has undeniable benefits as well. It becomes a balancing act between testing and adopting new tech on the one hand and verifying positive business outcomes on the other. Google's algorithms think on a per-auction basis, with no view longer than a month's budget.

It remains our task to take a longer view – a strategic one – and to think of our first-party data as more than just remarketing audiences. What are the things that only you know about your business, and how can you translate that into more effective campaigns?"

Mike Ryan, Head of Ecommerce Insights at Smarter Ecommerce



8. Software and AI adoption

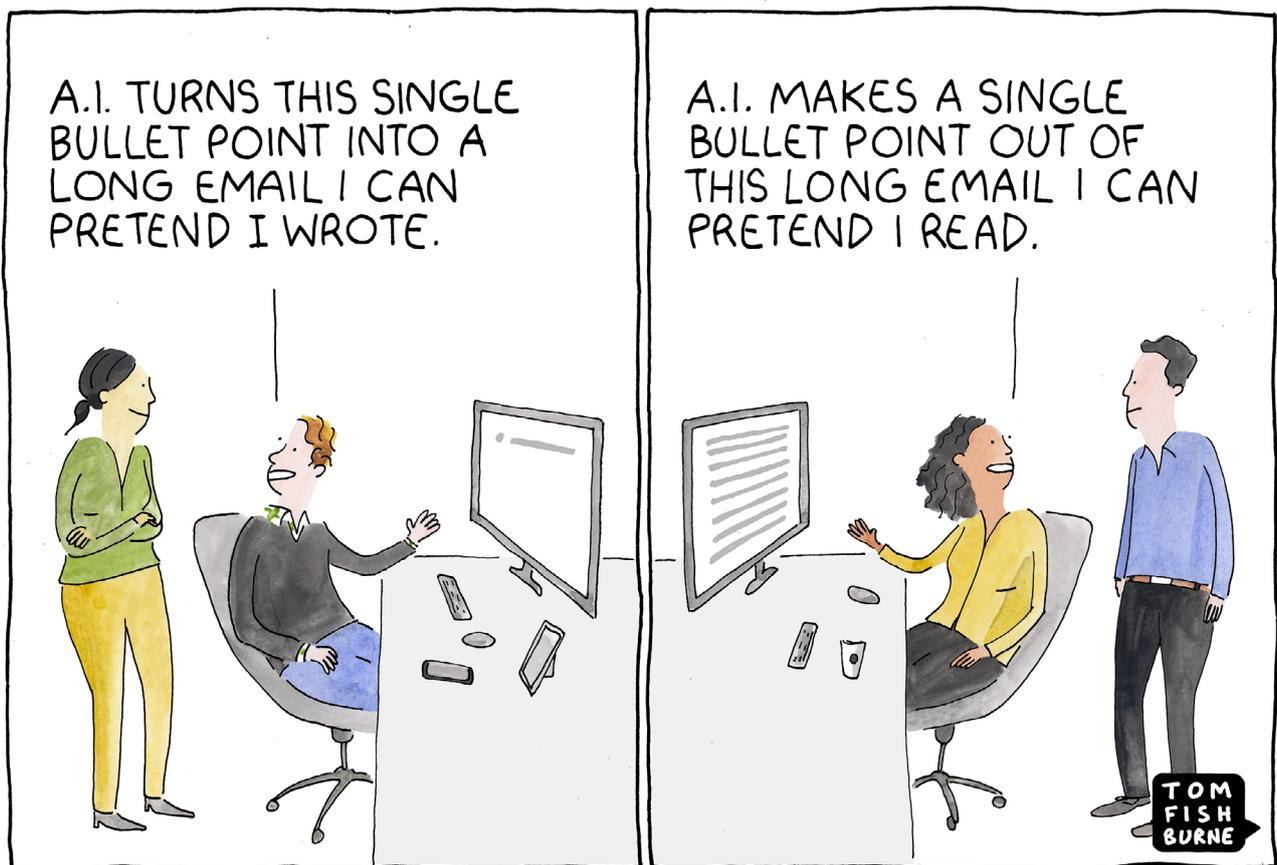
This chapter delves into how PPC specialists use AI, scripts, and software for different activities. There are hundreds of solutions and scripts out there, but in this chapter, the graphs will only show the ones selected by at least 3% of our respondents for readability. At the end of each paragraph, we'll mention the "long tail" of other solutions.

To dive deeper into all potential solutions, we recommend visiting ppc.software. It's a free directory with 200+ free and paid tools for PPC (including generative AI), categorized and enriched with relevant data (pricing, reviews, free trials, etc.), and updated regularly.

8.1 Adoption of generative AI for PPC activities

Since ChatGPT launched on November 30, 2022, the PPC community has been using generative AI for all sorts of PPC activities. The first use cases obviously involved creating ad copy and imagery, but this quickly expanded to writing and editing scripts. With the added power of Advanced Data Analysis (formerly Code Interpreter) and over [three million\(!\) custom GPTs](#) that have been created so far, it opens up a whole new set of capabilities.

Of course, it's not just OpenAI's ChatGPT; there's [Google's Gemini](#), [Anthropic's Claude](#), [Microsoft's Copilot](#), and dozens of point solutions for text, images, audio, video, and code.



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Generative AI is not only changing the way we create, it's also changing the way we search, as you can experience with [Google's SGE](#), [Bing's Copilot](#) and AI-powered search engines like [Perplexity AI](#) and [You.com](#).

For a potential glimpse into the future, Arc is re-inviting the browser and search experience with [Arc Search](#) and "browse for me," demonstrated in this [14-minute video](#) that shouldn't bore search professionals.

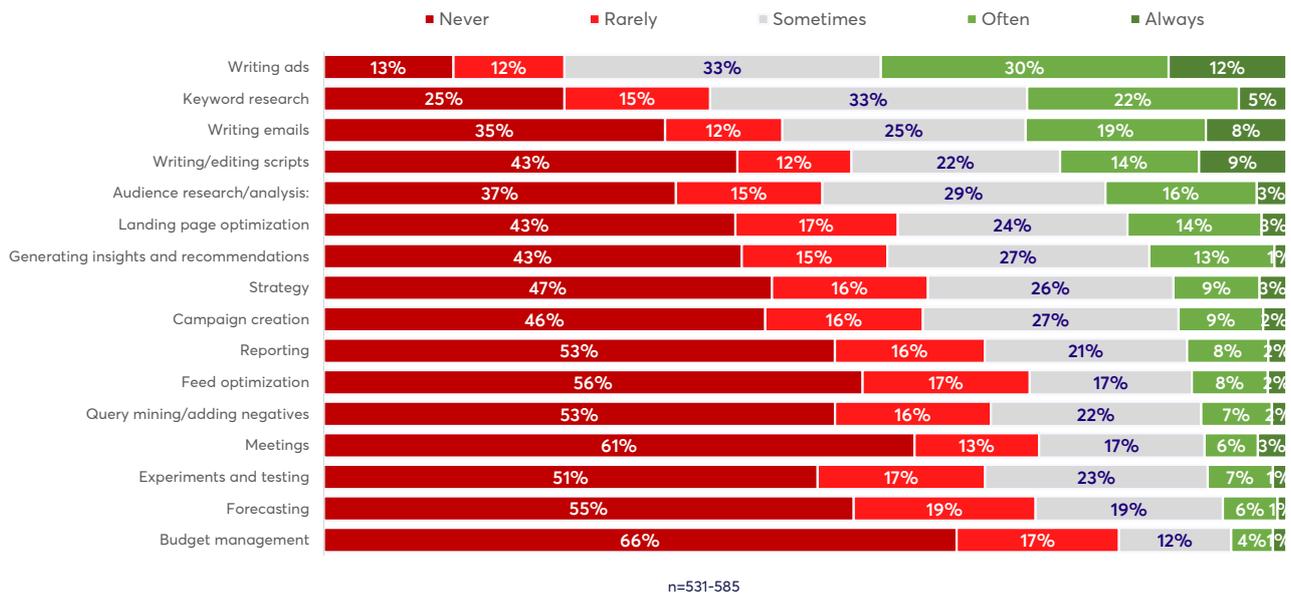
So there's no question that AI will profoundly impact the (search) marketing and advertising industry if it isn't already. How (much) exactly remains to be seen.

Sam Altman, CEO of OpenAI, [recently said the following](#) about the impact of AGI ([artificial general intelligence](#)) on marketers. He expects AGI to be a reality in about 5 years. *"It will mean that 95% of what marketers use agencies, strategists, and creative professionals for today will easily, nearly instantly and at almost no cost be handled by the AI — and the AI will likely be able to test the creative against real or synthetic customer focus groups for predicting results and optimizing. Again, all free, instant, and nearly perfect. Images, videos, campaign ideas? No problem."*

Another interesting perspective comes from Mark Read, CEO of WPP. He recently told the [Financial Times](#), *"It is too early to say whether these [AI] moves will lead to more or fewer jobs in the sector. It's much easier to see all the jobs that AI will disrupt than all the jobs it will create. But it's going to make creative people even more important because it can level the functional playing field and make the idea itself even more critical."*

Finally, author of "Madison Avenue Manslaughter" [Michael Farmer](#) expects AI to handle 20% to 40% of a creative agency's man-hours. This further underscores the urgency of moving away from hourly billing.

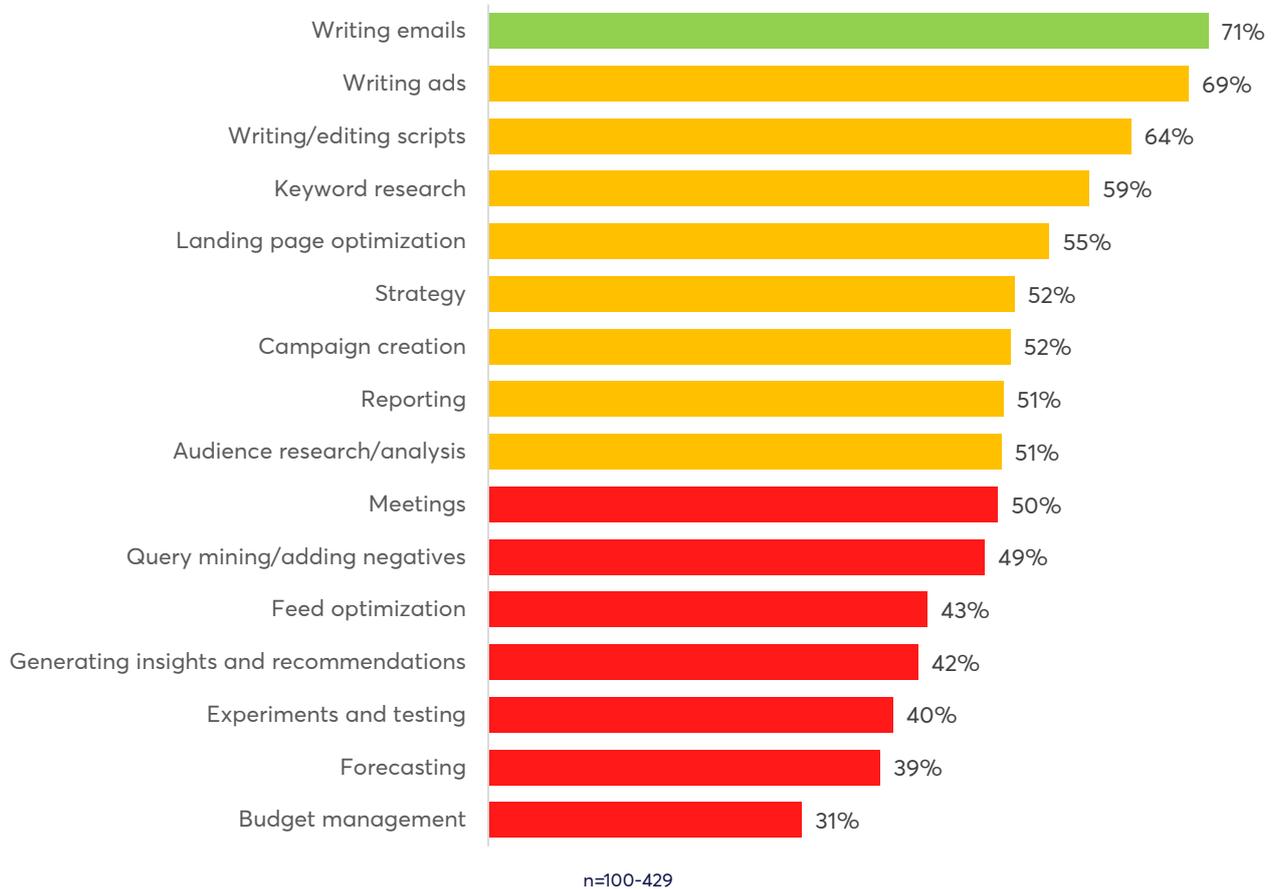
So, a year after the launch of ChatGPT, it was a good time to ask individual contributors and freelancers how often they use generative AI for specific PPC-related activities.



As you can see in the chart above, despite all the hype, GenAI isn't common practice for most PPC practitioners yet, but we expect this to change significantly in the coming years.

8.2 Satisfaction of generative AI for PPC activities

If a respondent answered that they used GenAI sometimes, often, or always for a specific task, we asked a follow-up question about how satisfied they were with the results of AI for this task.



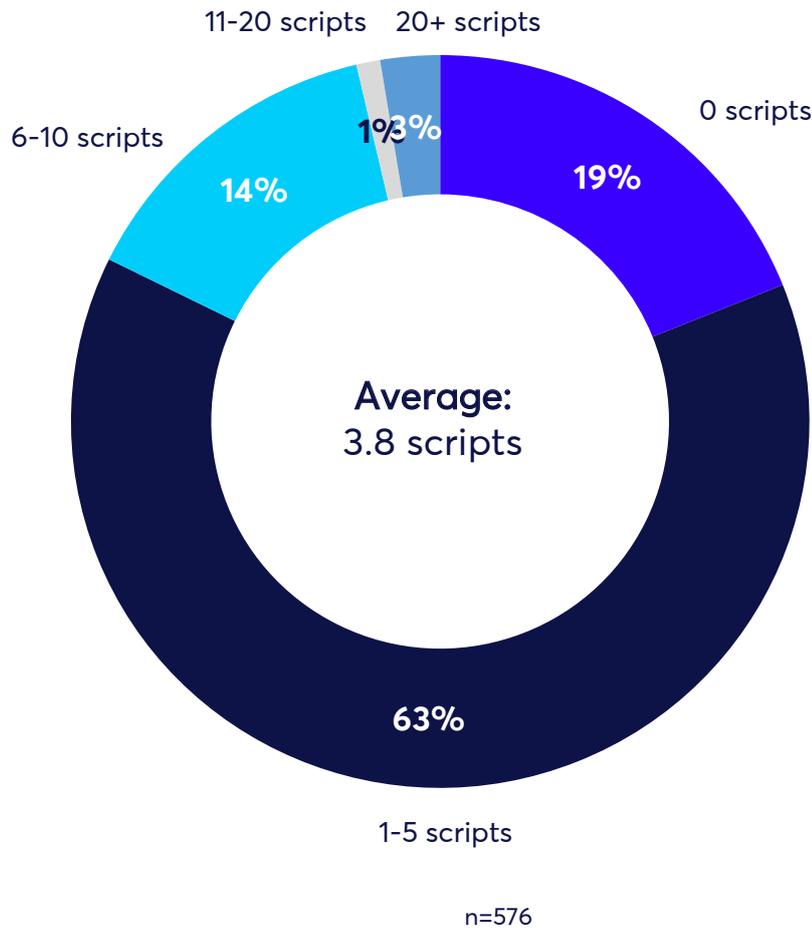
There are two striking features of satisfaction with Generative AI tools such as ChatGPT. First, satisfaction is not that high. Second, satisfaction is broadly correlated with frequency of use (8.1).

Regarding overall satisfaction, only one task, writing emails, delivers high or very high satisfaction to >70% of users. Otherwise, use cases quickly drop off into the 50/50 range – hit or miss. This is a reminder of the novelty (and immaturity) of both the technology and the users.

Secondly, usage frequency and satisfaction are roughly correlated. The causation here is not given, so it becomes a chicken-or-egg dilemma: are marketers using AI more often for tasks when satisfied, or are they more satisfied after using AI more often (and gaining skill)?

As a final thought, many of the low-satisfaction tasks, such as forecasting and budgeting, are tasks that are not immediately well-suited to technology like Large Language Models that have become synonymous with AI. There might be a mismatch between expectation and reality.

8.3 Number of scripts running in each Google Ads account



Not a week goes by on LinkedIn without a paid search expert sharing his or her latest script and getting loads of (incentivized) engagement on it.

But when it comes to the actual implementation, 82% of specialists have fewer than six scripts running in their accounts, on average.

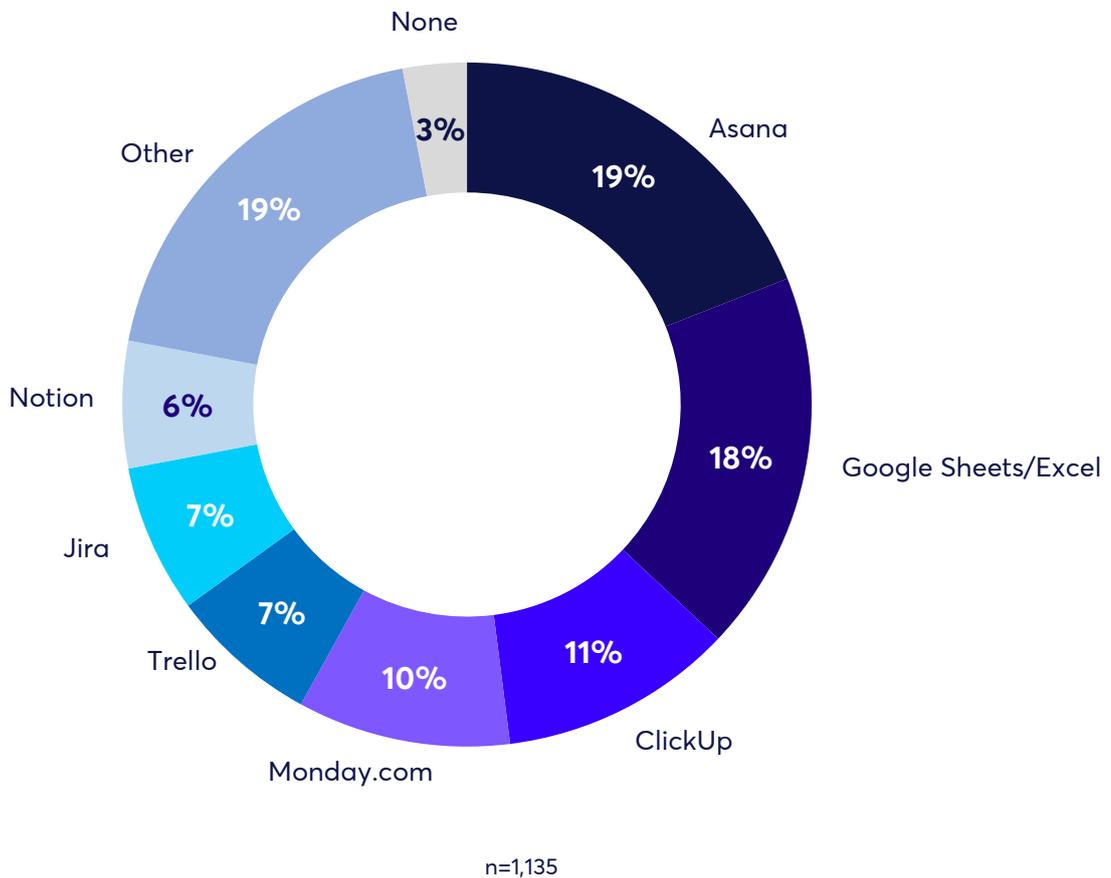
19% of the PPC specialists participating in the survey don't use any scripts at all.

While this question only shows the data about the usage of scripts, it's interesting to think about the reasons for this. PPC specialists may choose not to use scripts for various reasons despite the potential benefits they offer. Some professionals may lack the necessary programming skills or find script implementation too time-consuming or error-prone. And, reliance on scripts may raise concerns about their ongoing maintenance and potential errors, which could impact campaign performance.

The only significant outlier we found in this data were companies managing more than \$3M/mo. 11% of these companies use over 20 scripts vs. the 3% average.

8.4 Project/task management solutions

We asked all respondents about project management and reporting solutions, as everyone has to work with these. After these first two categories (8.4 and 8.5), we only asked individual contributors and freelancers about the tools they use for different PPC activities.



- ◆ Jira (11%) and Notion (10%) are more popular in Continental Europe.
- ◆ In North America, Monday.com (16%) and Wrike (6%) are more popular.
- ◆ Agencies are less likely to use Google Sheets/Excel for project management (13%), while companies managing less than \$5K are more likely to use spreadsheets (34%).

Solutions that were mentioned in the "Other" category were (in order of frequency) Teamwork, Wrike, Basecamp, Workfront, Smartsheet, and Accelo.

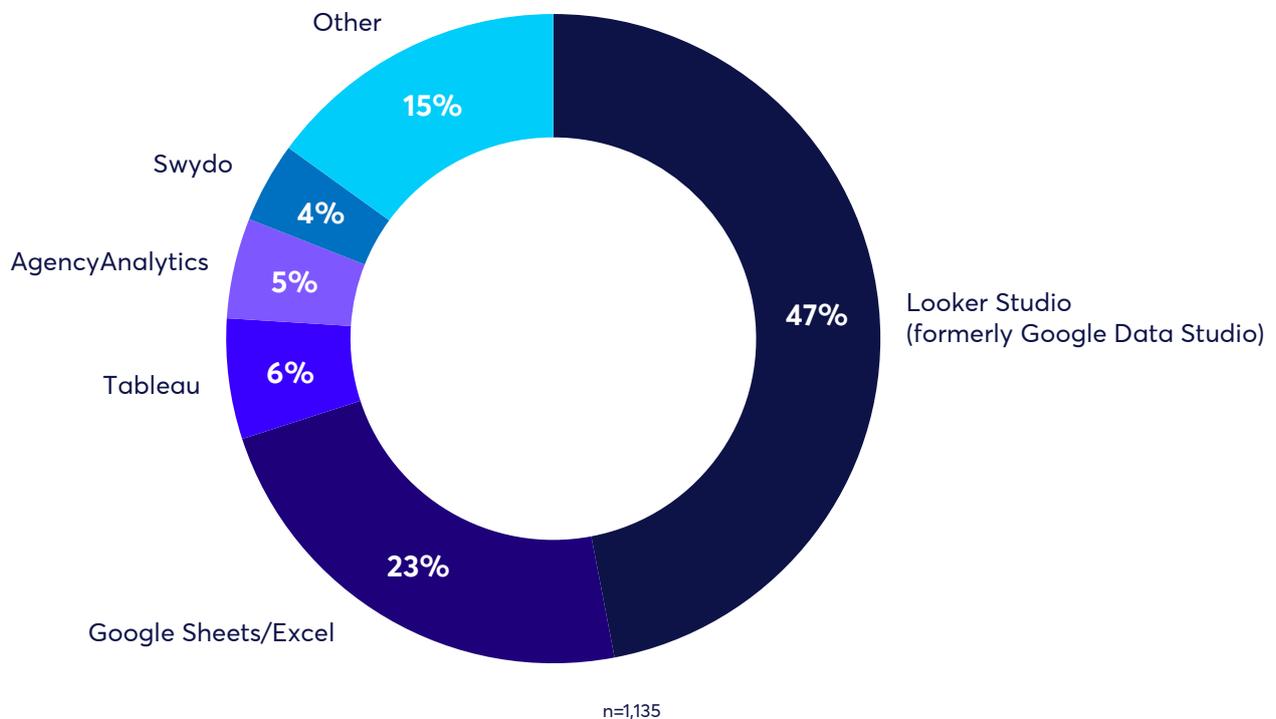
Project management in PPC remains a largely underrated form of efficiency gains. Having a process and writing it down is one of the simplest ways paid media teams can deliver consistent, high-quality service and results. In a revelation that comes as no surprise to any digital marketer, Excel and Google Sheets are second only to Asana in popularity.

8.5 Reporting/data visualization solutions

Reporting and data visualization solutions facilitate the processes of aggregating data from multiple platforms and data analyses. They also help to effectively and efficiently communicate insights to improve performance and decision-making.

They typically fall into two categories: Business Intelligence (BI) tools and Marketing Analytics tools, with BI tools offering broader data analysis capabilities and Marketing Analytics tools focusing on marketing-specific metrics and reporting.

Agency Analytics and Swydo are Marketing Analytics tools, while Looker, Tableau and Power BI fall under BI tools. Which to use depends on the user's or organization's specific needs. The use of these tools, even in mixed forms, shows the professionalism and maturity of the PPC industry.



Full disclosure: Swydo is one of the partners of this survey, and therefore, the results may be slightly skewed in their favor. However, as you can see, 96% of respondents weren't Swydo users, so we believe we reached enough people outside of their user base to make the data worthwhile.

- ◆ Looker Studio is more popular in Continental Europe (55%).
- ◆ Tableau is more popular in North America (12%) and for monthly spend levels above \$3M (19%).
- ◆ Spreadsheets are used more often in South & Southeast Asia (55%) and for spends below \$5K (45%).
- ◆ Agencies are less likely to use spreadsheets for reporting (16%) and more likely to use Swydo (6%).

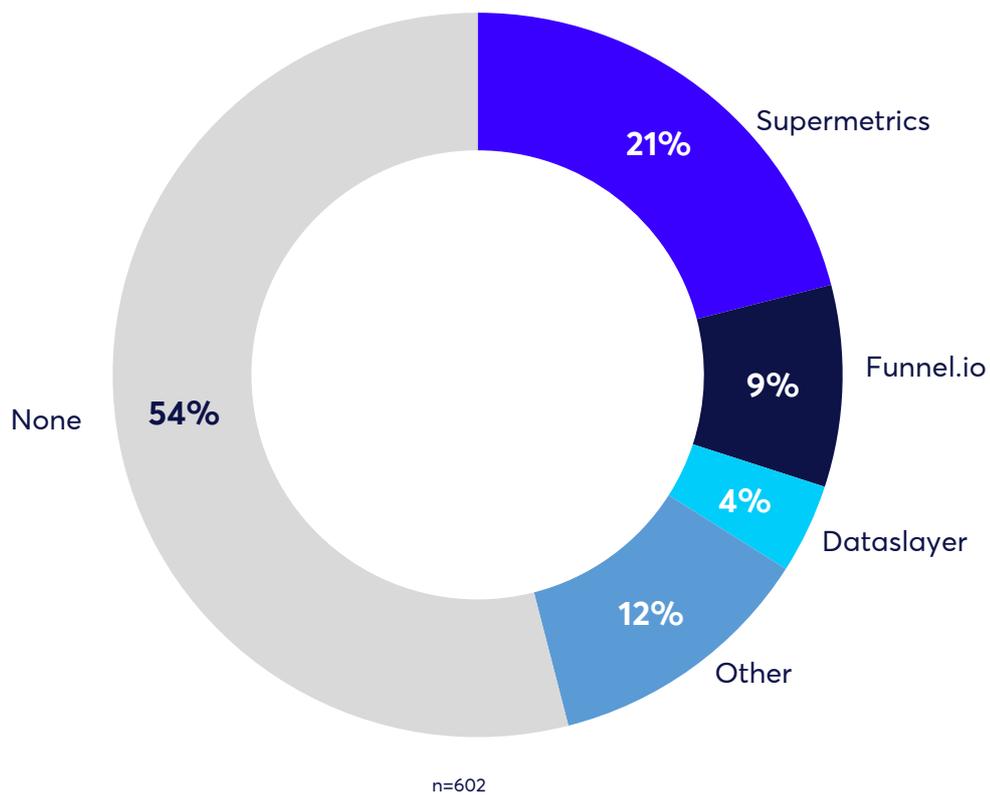
Solutions that were mentioned in the "Other" category were (in order of frequency) Power BI, Databox, Whatagraph, Oviond, Ninjacat, and Dashthis.

8.6 Marketing data pipeline (ETL) solutions

Closely related to, but not to be confused with, the previous category are marketing data pipeline solutions, i.e. tools with ETL (extract, transform, load) capabilities.

This category of solutions pulls marketing data from different sources and powers your reporting and analytics. In software terms, it's "middleware": you can't actually see or log in to these solutions, as they work in the background, piping data from different sources to the destination(s) of your choice.

As Looker Studio doesn't offer native integrations with non-Google products (besides a CSV workaround), these solutions can help get marketing data more easily from non-Google sources into Looker Studio, Google Sheets, or any other destination.

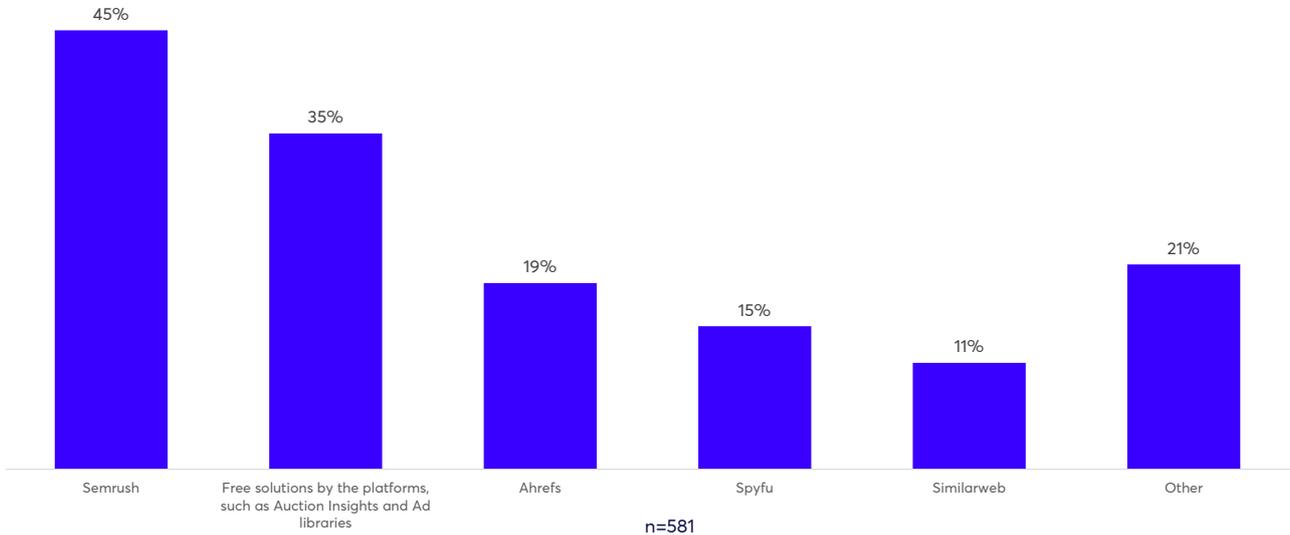


We see that nearly half of our respondents use one of these solutions, and Supermetrics is the clear market leader in this category.

Solutions that were mentioned in the "Other" category were (in order of frequency) Power My Analytics, Adverity, and Two Minute Reports (Gox.ai).

8.7 Competitive intelligence solutions

For this category, respondents could select up to two solutions, as it's common to use multiple solutions for competitive intelligence. For example, a free solution from the ad platforms (such as Auction Insights) and a third-party solution for additional insights.

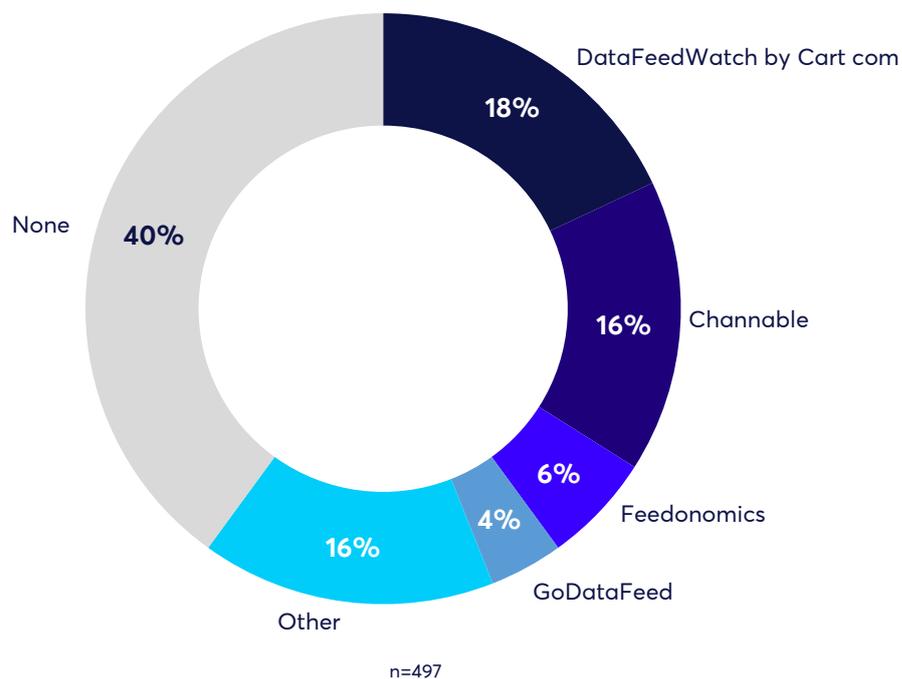


Spyfu was the only solution with significantly different popularity between regions:

- ◆ It's much less popular in Continental Europe (5%).
- ◆ It's much more popular in North America (31%) and South & Southeast Asia (44%).

8.8 Feed management

8.8.1 Feed management solutions



Full disclosure: DataFeedWatch by Cart.com is one of the partners of this survey, and therefore, the results may be slightly skewed in their favor. However, as you can see, 82% of respondents weren't DataFeedWatch users, so we believe we reached enough people outside of their user base to make the data worthwhile.

- ◆ Channable is more popular in Continental Europe (30%).
- ◆ Feedonomics is more popular in North America (16%) but much less popular in Continental Europe (2%).
- ◆ Shoptimised is most popular in the UK & Ireland (15%).

Solutions that were mentioned in the "Other" category were (in order of frequency) Shoptimised, ChannelEngine, Producthero, and Simprosys.

"For most PPC specialists, feed management is a hideous task, and it requires a lot of specific knowledge.

Luckily, in the past few years, platforms like Shopify have standardized the syncing of product data to other channels. Also, Google is putting in a lot of effort to make it easier with the introduction of Google Merchant Center Next. It automatically pulls in products and information from websites. Synchronizing product data from your store to the ad platform has become table stakes. Now, analyzing and optimizing your product data to have a competitive advantage is more important than ever. Optimizing your product content with generative AI will be a lifesaver. It will help you to easily improve product feed quality and enrich product data.

This will improve the performance of your feed-based campaigns. By using tools like Producthero you can easily analyze your product performance, optimize your product content by using AI, and decide on winning campaign structures."

Martijn Beumer, co-founder at Producthero

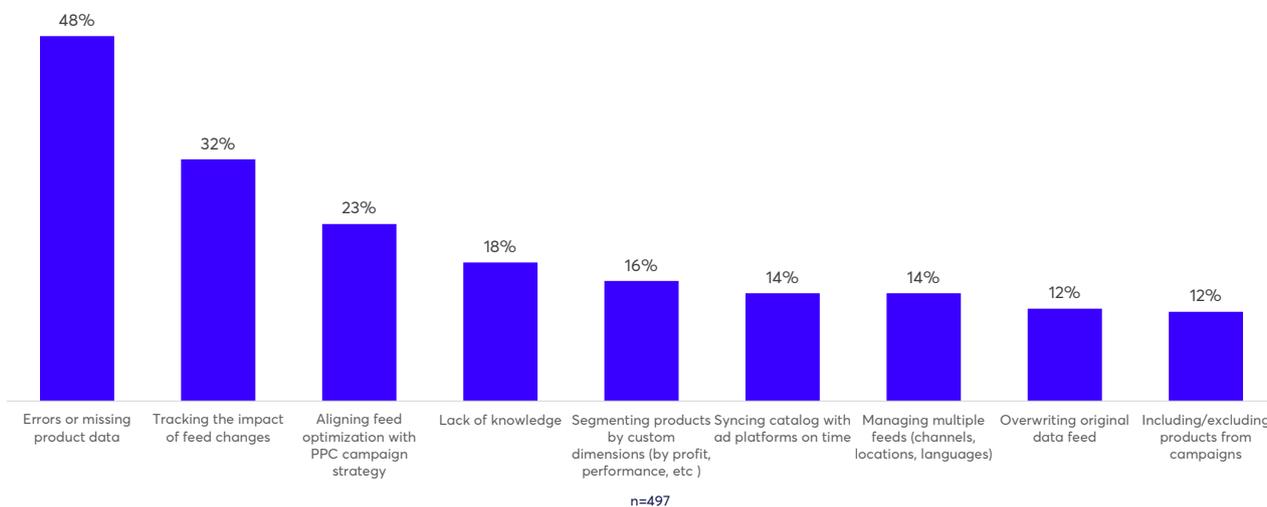


8.8.2 Feed management challenges

The number one challenge in managing product feeds is "Errors or missing product data", mentioned by nearly half of the respondents. About a third also struggle with tracking the impact of feed changes.

For agencies, the main feed challenges align with the overall survey results. In-house marketers, on the other hand, encounter a different landscape: tracking feed changes takes the first spot (at 40%), closely followed by errors or missing data at 37%.

This may be attributed to agencies relying on limited data provided by e-commerce clients, whereas in-house marketers likely have easier access to product data sources.



"In feed management, a popular credo among marketers is 'let me solve the feed errors so I can move onto optimizing my campaign.' This approach, while addressing the immediate pain point, may inadvertently create a blind spot in their PPC strategy.

The real game-changer? Aligning feed optimization with your campaign goals. Our over-a-decade experience with global e-commerce brands reveals this alignment as the ultimate key to leveraging feeds effectively. The statistics, notably the third position, underscore this area.

Choosing the right feed tactics opens the door to more control over your ads and significant performance increases. Struggling with boosting your ROAS? Here's a powerful play: calculate the profit margin per product in your feed and segment the campaign based on the level of profitability with a custom label. I've seen it bring great results, like 96% ROAS growth, more times than I can count. And that's only the tip of the iceberg..."

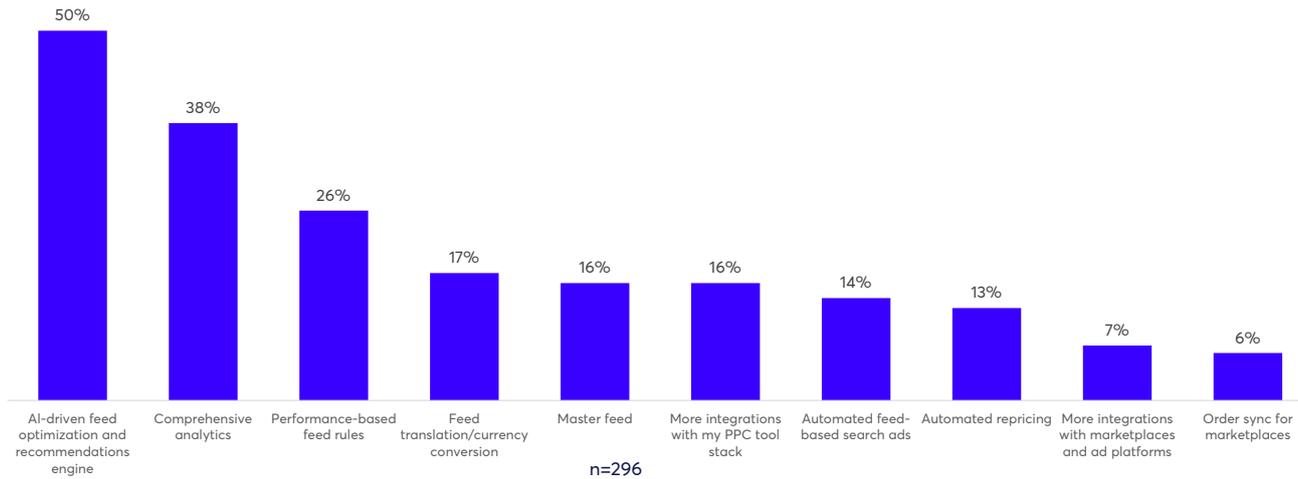
Jacques van der Wilt, General Manager Feed Marketing at DataFeedWatch by Cart.com



8.8.3 Feed management wish list

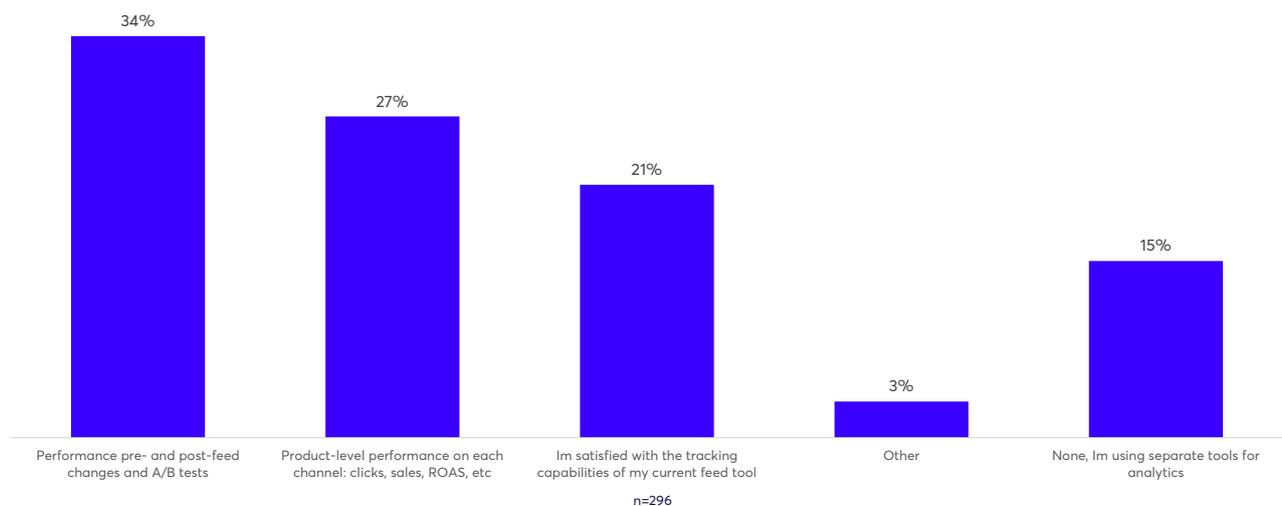
The marketing industry recognizes the transformative impact of AI and is striving to expand its usage to various areas of PPC management. Half of the respondents desire AI-driven feed optimization and recommendations in their current feed tools.

This sentiment is particularly strong among PPC specialists with less than a year of experience, where almost 70% highlight the need for this feature, showcasing their trust in AI's ability to effectively automate, optimize data, and provide reliable outputs.



Comprehensive analytics has emerged as the second most in-demand feature, shedding light on one of the critical challenges in feed management — the inability to track the impact of feed changes.

Asked about the specific tracking capabilities marketers wish to have in a feed management tool, 34% of marketers desire pre- and post-feed changes performance and A/B tests. Meanwhile, 27% of respondents consider product-level performance



Unsurprisingly, only 21% of surveyed PPC marketers reported satisfaction with the available tracking options. This indicates a need for dedicated analytical functionality for feeds that current analytics and feed tools in the market fail to address — presenting an opportunity for software providers. data on each channel (such as clicks, sales, and ROAS) to be an important feature.

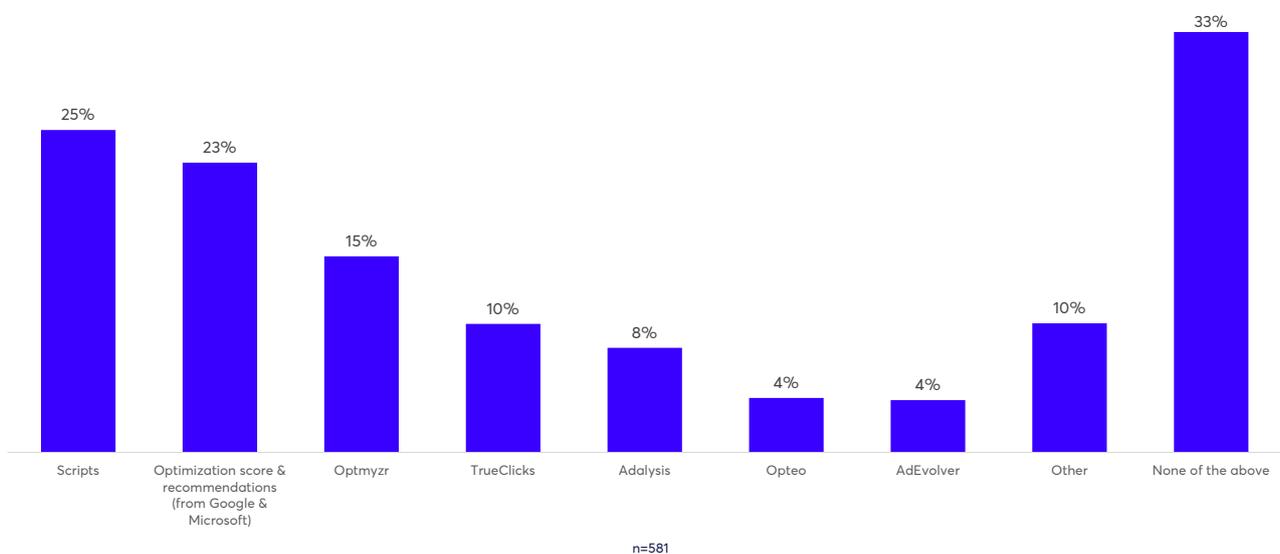
8.9 Solutions for analysis, monitoring and optimization

For this category, respondents could select up to three solutions, as it's common to use a combination of solutions for these activities, such as a combination of scripts, in-platform recommendations, and a third-party tool.



"The most successful digital marketers will be those who successfully merge machine capabilities with human oversight. One without the other will fall short of the full potential. When software helps with time-intensive, repetitive tasks, we can focus on what we enjoy. Instead of constantly monitoring campaign performance, we can make more meaningful contributions to the brands we service."

Frederick Vallaeys, co-founder & CEO at Optmyzr



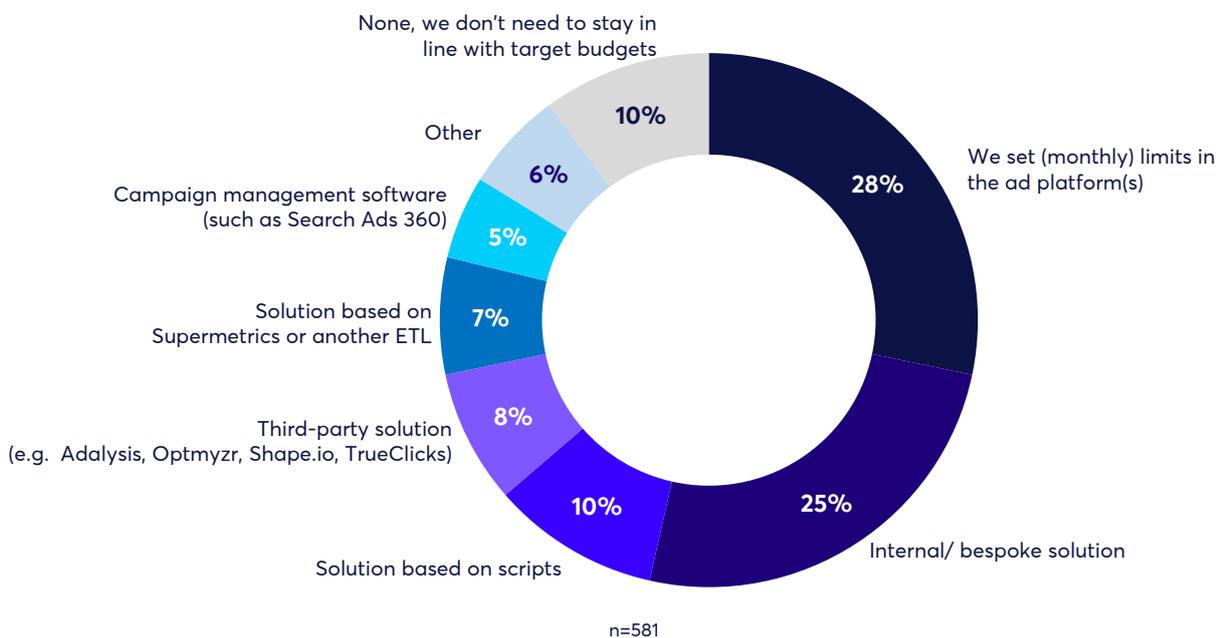
Full disclosure: Optmyzr, TrueClicks, and AdEvolver (by Ed Leake from God Tier Ads) are partners of this survey, and therefore, the results may be slightly skewed in their favor. However, 72% of respondents weren't using any of these three solutions, so we believe we reached enough people outside of their user base to make the data worthwhile.

- ◆ Optmyzr is more popular in North America (29%) and less popular in Continental Europe (9%).
- ◆ TrueClicks is more popular in Continental Europe (16%).
- ◆ PPC Samurai is more popular in South & Southeast Asia (11%).

Solutions that were mentioned in the "Other" category were (in order of frequency) Adzooma, Adsbot, PPC Samurai, and GOA Marketing.

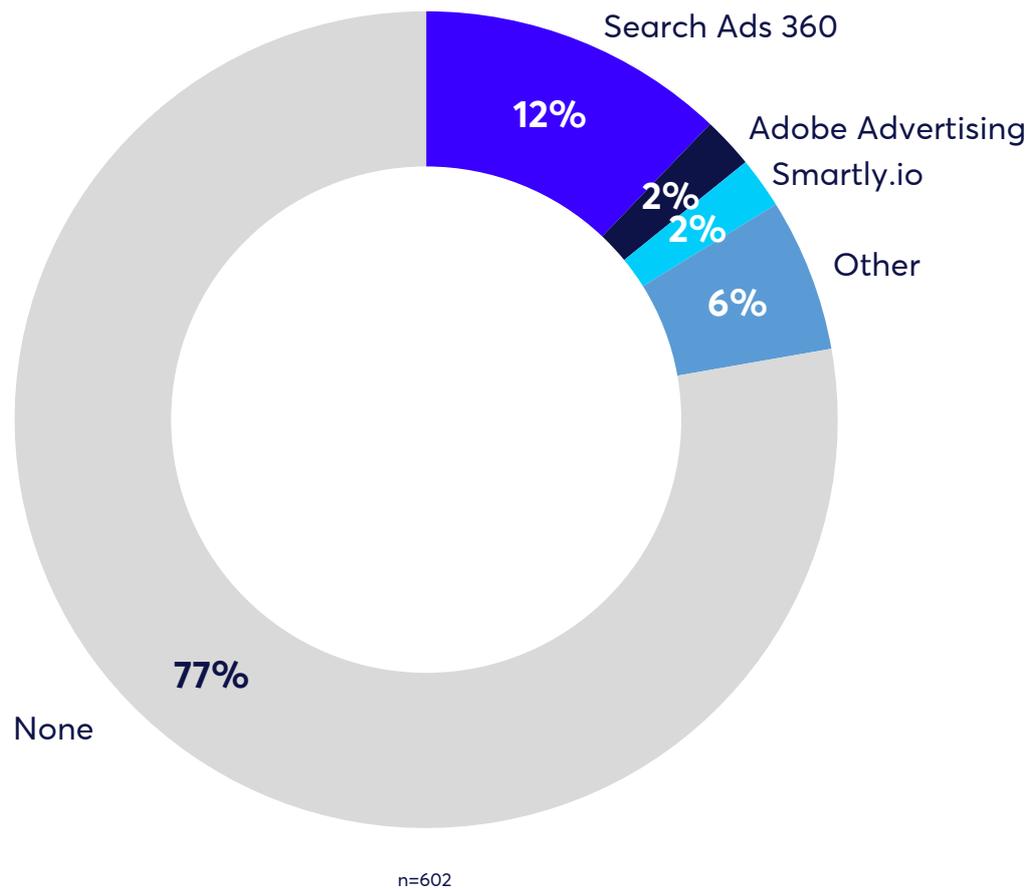
8.10 Budget management solutions

Budgets remain a challenge in PPC. A balance is needed between spending enough to drive growth at a manageable rate and preventing anomalies and ad platform tendencies from exceeding what brands and clients allocate to advertising. Surprisingly, nearly four in ten respondents either trust fully in platform-side inputs or have no issues with exceeding budgets.



8.11 Multi-channel campaign management solutions

Despite multi-channel advertising posing enough of a challenge for 92% of respondents to share their biggest hurdles, 77% of them do not use software to make this process easier. Whether this indicates a lack of overall faith in available solutions or a lower priority than claimed is uncertain. The price tag of these solutions probably also plays a role.



As expected, the higher the monthly spend level, the more common these solutions become.

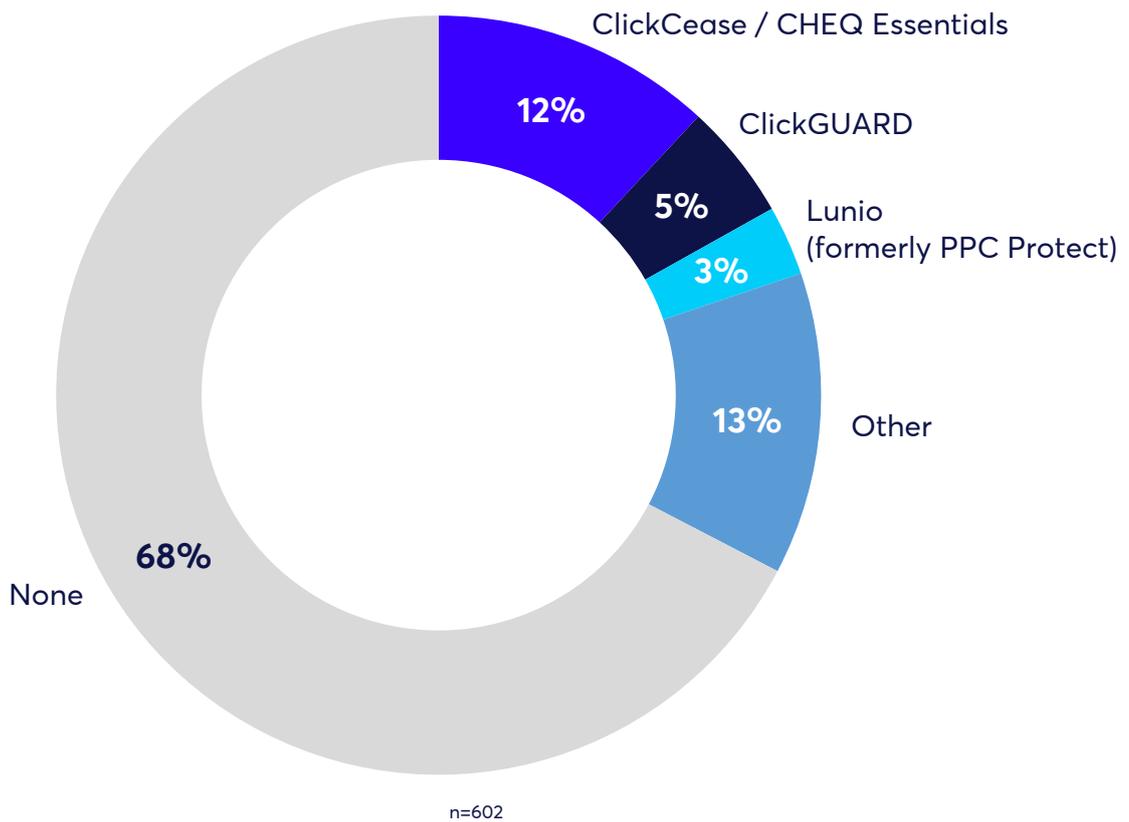
45% of respondents with a spend above \$3M/mo use one of these solutions, and 53% of them picked Search Ads 360.

Solutions that were mentioned in the "Other" category were (in order of frequency) Marin Software, Skai (formerly Kenshoo), and Albert.ai.

8.12 Click fraud solutions

Over two-thirds of our respondents don't use any click fraud solution. The top two reasons (not shown below) for not using such a solution were:

- ◆ Not believing the added value justifies the price (39%)
- ◆ Trusting that the ad platforms take care of it (23%)



We saw the following significant outliers based on geography:

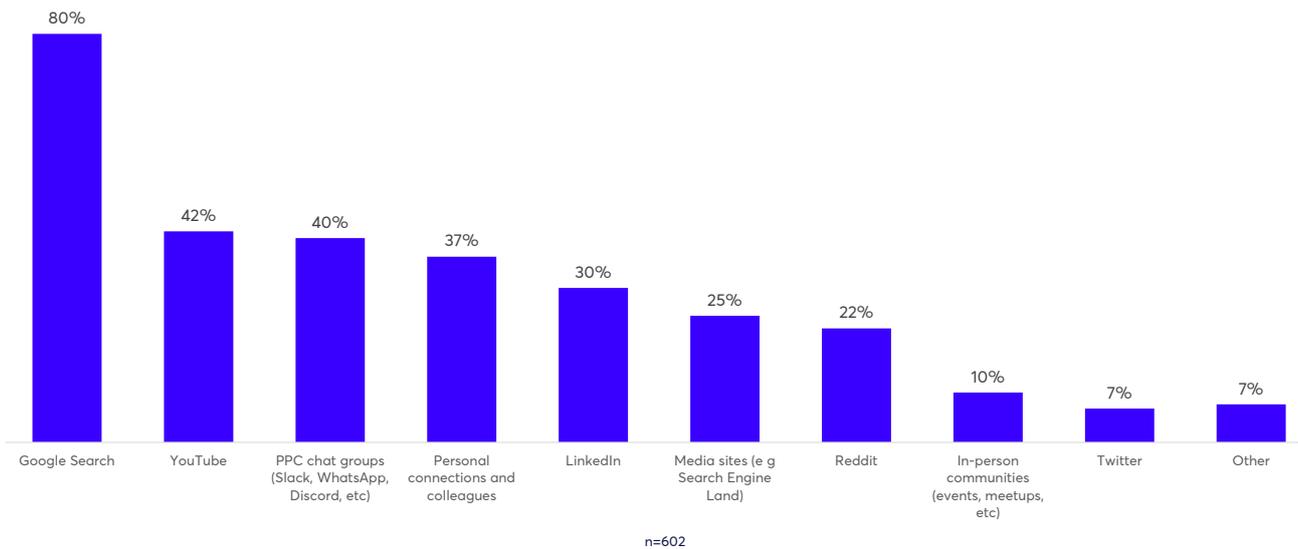
- ◆ ClickCease / CHEQ Essentials is most popular in North America (25%).
- ◆ Lunio is most popular in the UK & Ireland (13%).
- ◆ TrafficGuard is most popular in South & Southeast Asia (11%).

9. PPC communities, events, and resources

9.1 Most popular resources

When looking for answers to PPC-related questions or challenges, the vast majority of PPC experts feel most comfortable casting a wider net for answers with a Google Search query.

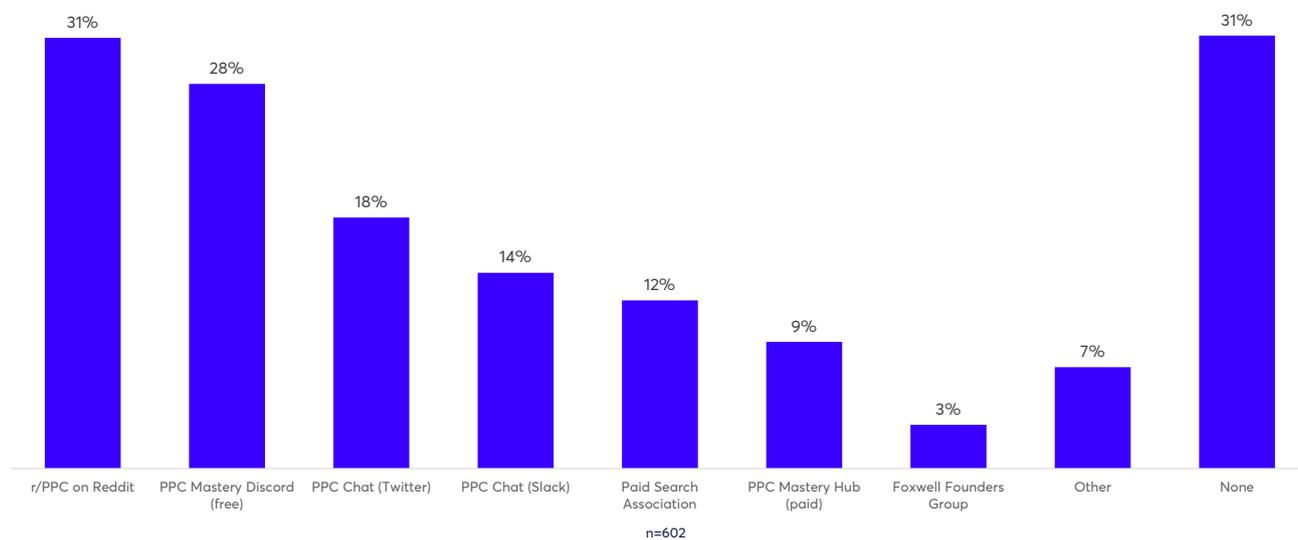
Following this, marketers show nearly equal preferences for video content and personal interactions, whether through platforms like YouTube, PPC chat groups, or personal connections.



One in four respondents turn to media sites (like Search Engine Land) for answers to their challenges. This percentage is higher with our North American respondents: 38%.

Twitter (X) is the least popular platform, but experienced PPC professionals tend to use it more. 14% of experts with 10+ years of experience use Twitter (X), while only 2% of those with 1-2 years of experience turn to X for answers.

9.2 Most popular communities



r/PPC on Reddit is more popular in North America (49%), while PPC Mastery Discord is less popular in this region (13%). Resources that were mentioned in the "Other" category were (in order of frequency) Ed Leake's groups (Facebook, Forge), PPC Live UK (Whatsapp), and /r/ppc on Slack (invite only).

It's great to have such a wide variety of platforms that PPC specialists use to gather in communities, from the most popular Reddit community to closed groups on Discord, open discussions on X (Twitter), and groups on WhatsApp.

All of these communities provide a collaborative space for PPC specialists to share insights, tools, best practices, and industry updates. This is crucial for people who want to stay ahead in an industry that is changing so quickly. Many people in the community love to provide feedback on new strategies, tactics, or tools.

These PPC communities play a crucial role in creating a sense of belonging, continuous learning, and collective growth within the industry.

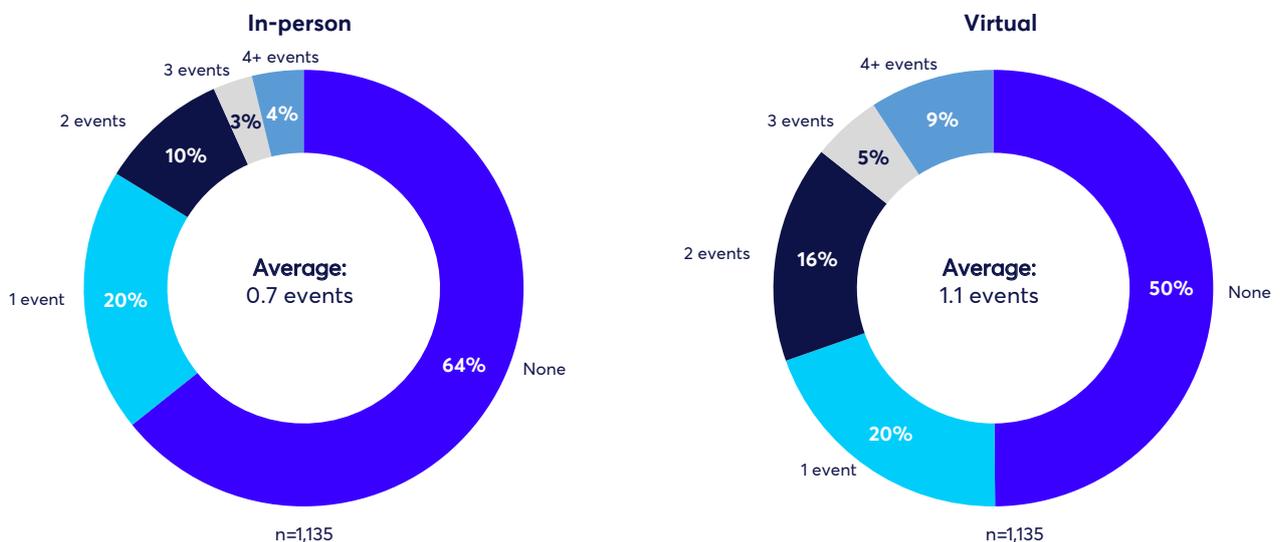
9.3 (Search) marketing events

Next to online resources and communities, we also asked our audience about attending events in 2023.

9.3.1 Event attendance

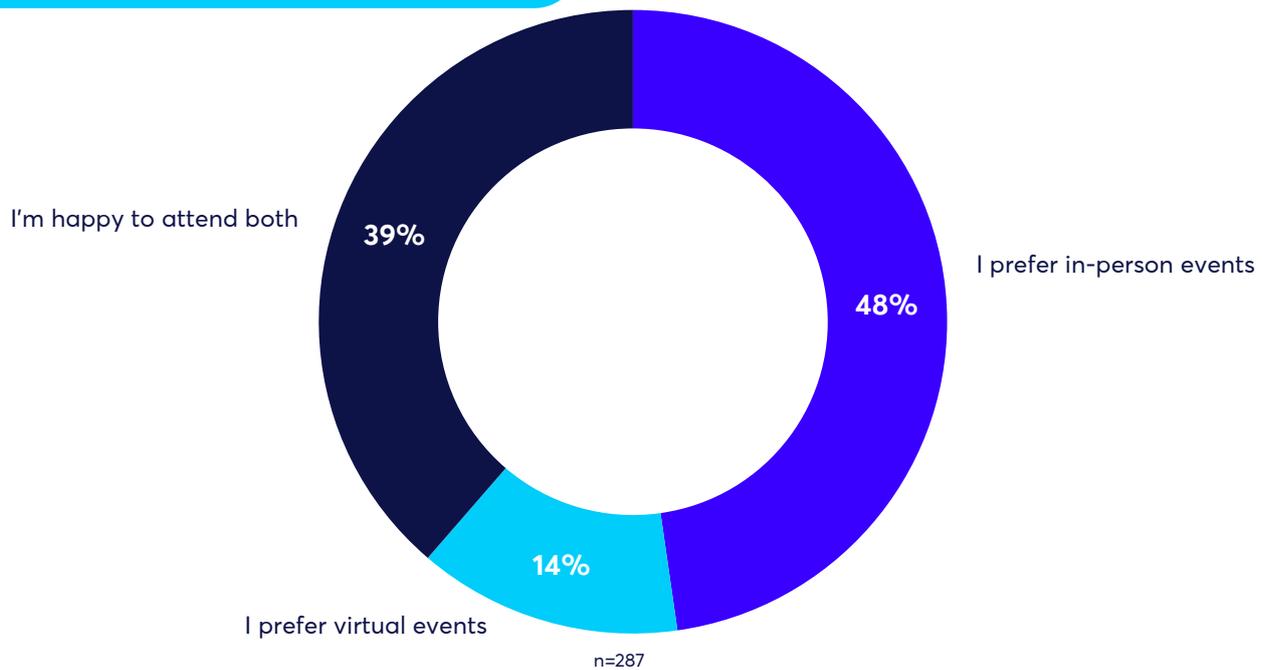
We asked our respondents two questions about event attendance to be able to split out in-person vs. virtual events:

- ◆ How many in-person (search) marketing events/conferences did you attend in 2023 (such as SMX in Europe, BrightonSEO, Mozcon, Pubcon, Inbound, etc.)?
- ◆ How many virtual (search) marketing events/conferences did you attend in 2023 (such as SMX Advanced/Next, Ad World Conference, SparkTogether, etc.)?



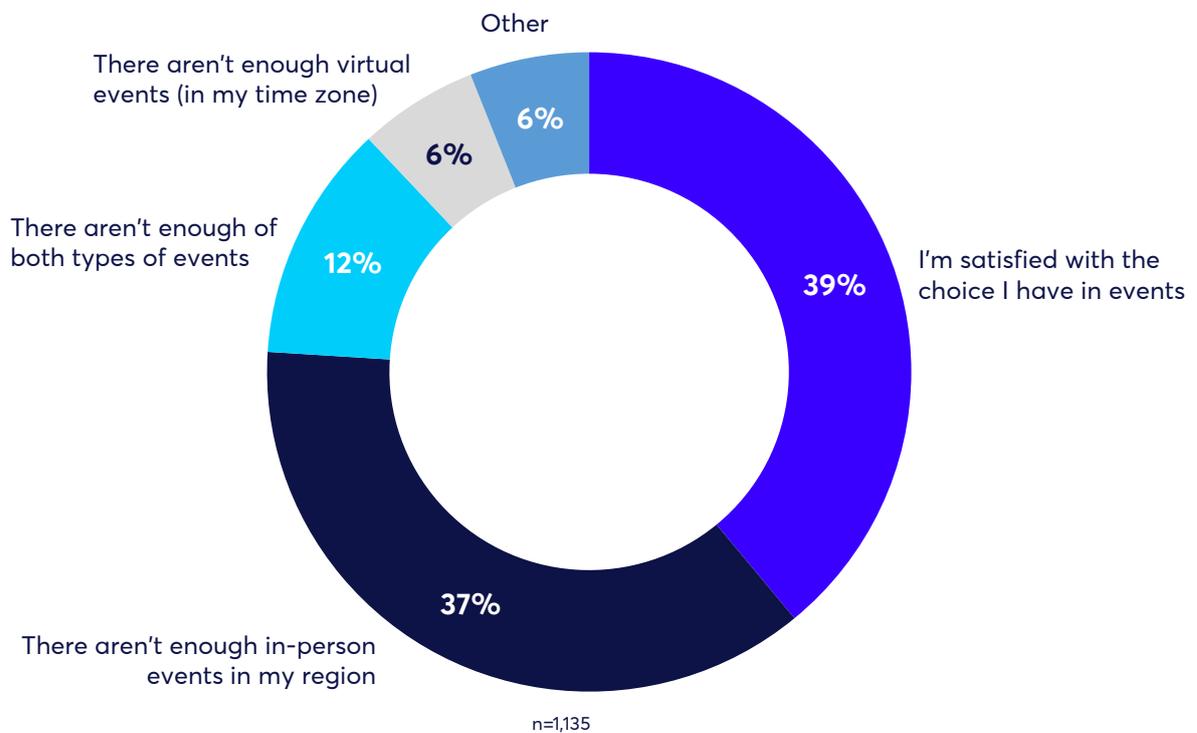
- ◆ Respondents in Continental Europe were more likely to attend at least one in-person event (44%) in 2023, while respondents in North America were less likely to do so (26%). This probably has much to do with more availability of in-person search marketing conferences in Europe, such as SMX in Munich, London, Paris, and Berlin.
- ◆ Respondents with more than ten years of experience were more likely to attend more than three virtual events last year (14%). The same goes for people working at a company managing more than \$3M/mo (20%).

9.3.2 Event preference



For respondents who attended at least one in-person and one virtual event, we asked about their preferences, and we see a clear preference for in-person events.

9.3.3 Event availability



If you add up all the "not enough" answers, it adds up to 55% of respondents saying there should be more of at least one type of event in their region or time zone.

37% of respondents said there aren't enough in-person events in their region, and this doesn't differ much across most regions, with the exception of Australia & New Zealand and the Middle East (both 52%).

We expected North America to score higher than Europe for this question as well, as they had fewer in-person (search) marketing events since COVID-19. Apparently, they don't miss these events more than their peers across the pond.

Just 10% of the respondents from Australia & New Zealand were satisfied with the choice they have in events. This is understandable given their time zone difference and distance to Europe and the United States.

The 6% of respondents answering "Other" were either not interested in or too busy for any event or found the travel costs too high for in-person events.

10. The Top 50 Most Influential PPC Experts

You'll find our list of the Top 50 Most Influential PPC Experts of 2024 on PPCsurvey.com, including a detailed breakdown of our methodology for getting to this ranking.

Also, be sure to check out our alphabetical "shortlist" of the Top 100 Most Influential Experts.

We hoped you enjoyed the report!

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