

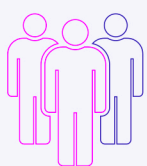


2023 ADVANCED TV UNCOVERED

EUROPEAN MARKETERS SURVEY*

A 'sweet and sour' outlook

UK marketers are often the most sensitive to economic variation and the year ahead is no exception. Compared to their EU counterparts, UK marketers are rather pessimistic, almost half of them expect marketing budgets to be cut. Interestingly, agencies and advertisers diverge when it comes to top marketing priorities. While both groups are prioritising customer acquisition, advertisers are more focused on revenue growth and profitability than agencies are. Agencies are perhaps taking a longer-term view by instead focusing on customer retention. But it is not all gloom and there are strong growth expectations in advanced TV in 2023, in particular due to the targeting capabilities of the various channels. A difficult year ahead is expected by UK marketers, some further efforts will be needed to raise level of awareness around the advanced TV offerings, which is a key inhibitor of growth in the UK.



53% UK MARKETERS

expect marketing **spend to be at least at the same level** as last year.

70%

of marketers expect an **increase in Advanced TV spend** in the next 12 months.



98%

Media agencies are planning to **augment spend on AVOD and FAST services.**



MARKETERS' TOP PRIORITY FOR 2023:

ACQUIRING NEW CUSTOMERS

UK Agencies are also keen to increase loyalty, while advertisers prefer to focus on growing revenue.



50%

of marketers are **satisfied with the level of spend in Advanced TV advertising.**



42%

of marketers would **prefer additional budgets.**



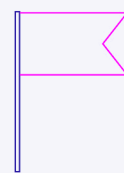
DATA TARGETING

is the **main driver of Advanced TV** ad spend growth.



MEASUREMENT

remains the biggest inhibitor of spend in 2023, along with the **lack of awareness in Advanced TV.**



MAXIMISING REACH

is again the **No. 1 driver of campaign success** for 45% of respondents.

*This research was conducted by independent media research firm CoLab Media Consulting between 18 and 22 July 2022. The research, commissioned by AudienceXpress, FreeWheel's premium video sales house, is an attempt to understand how marketers - advertisers and agencies - across five European countries (UK, France, Germany, Italy, and Spain) are adapting to the current market forces and how they are adjusting spending priorities and preparing for the year ahead.