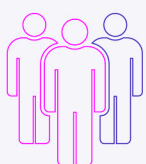


2023 ADVANCED TV UNCOVERED

EUROPEAN MARKETERS SURVEY*

A 'sweet and sour' outlook

When economic prospects sour, marketing budgets are invariably the first to get cut. Yet the key priorities of customer acquisition and revenue growth are more important than ever. Lessons of the past speak to the powerful benefits of maintaining marketing spend during a downturn. German marketers are the strongest supporters of brand spend in the EU5. Their optimism in Advanced TV is relatively higher than their optimism in marketing budgets overall, indicating possible high share gains for the channel in the coming 12-months.



64% GERMAN MARKETERS

expect marketing **spend to be at least at the same level** as last year and **not 'go dark'** over the next 12 months.

78%

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



91%

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



MARKETERS' TOP PRIORITY FOR 2023:

ACQUIRING NEW CUSTOMERS

2023 will see a major focus on **upper-funnel marketing KPIs**.



53%

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



41%

of marketers would **prefer additional budgets**.



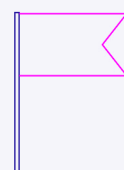
DATA TARGETING

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 now **No. 1 driver of campaign success** for 33% 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.