

— ITALIAN FINDINGS



FREEWHEEL MARKETERS' EUROPEAN SURVEY*

ADVANCED TV UNCOVERED

2022: Marketers tune in to the future of Advanced TV

FREEWHEEL
A COMCAST COMPANY

* in collaboration with CoLab Media Consulting, independent media research firm

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INTRODUCTION

Measuring Italian marketers' response to Advanced TV

Expectations, spending priorities, and audience preferences have all been subject to dramatic change following the disruption of the global pandemic. According to our study from 2020, **6 in 10** Italian consumers surveyed have now connected their TV sets to the internet, with **more than half** (55%) of these prizing the shared viewing experience it offers.

Italian marketers seem keen to capitalise on this audience trend, so FreeWheel worked with CoLab Media Consulting, the independent media research firm, to learn what their plans could mean for the future of the Advanced TV landscape.





Methodology

121 marketers were surveyed comprising primarily **advertisers** (29%), **agencies** (37%) and other **marketing decision makers** (34%).

The study was conducted by an independent media research firm, CoLab Media Consulting between 23 July and 2 August 2021 in Italy*.

TAKEAWAY 1

2020 vs. 2021: marketers' optimism seems to return

Overall marketing spend is predicted to see a **net increase of +3%**, signalling cautious optimism from the Italian marketers surveyed. This shows a notable improvement from our 2020 survey, when they anticipated a -45% decline in budgets.

With Italian marketers surveyed also valuing Advanced TV's potential, a remarkable **79% expect to increase their Advanced TV spend**, making Italy the most promising market for Advanced TV in the next 12 months among the German, French, Spanish and UK markets. Video-on-demand investment will accelerate the fastest with a predicted **growth of 25%** in 2022 according to surveyed advertisers, Connected TV is not far behind with a predicted **growth of 22%**.

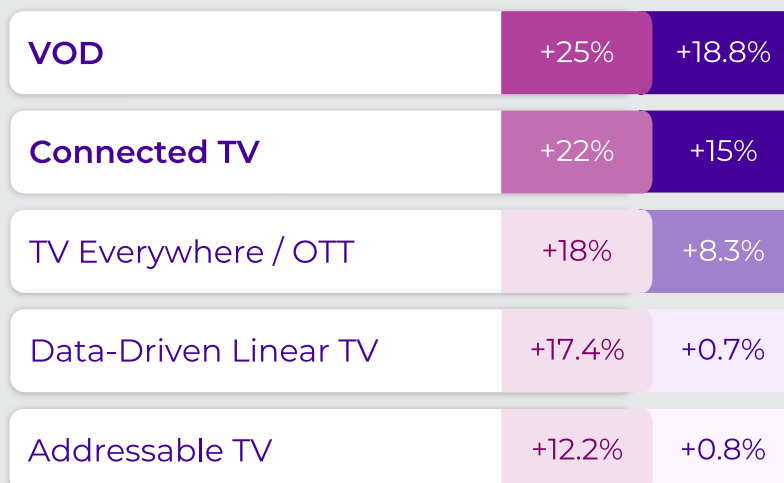
What sort of increase or decrease do you think you will see in your ad spend in the following areas of Advanced TV in the next twelve months?

Source: CoLab for Freewheel, European Advanced TV Uncovered, July-August 2021

Italian ad spend forecast
Next 12 months

Advertisers
Forecast 2022

Agencies
Forecast 2022



TAKEAWAY 2

Reaching new heights with Advanced TV

When asked about the main incentives behind their Advanced TV spends, Italian marketers, and especially Italian agencies, surveyed placed its **opportunities to extend traditional TV's reach** first. Italian advertisers, meanwhile, consider Advanced TV's **frequency management** as a key driver, making it the second most influential factor behind increased spend.

In a nutshell, it seems to be the very efficient use of the new capabilities offered by Advanced TV that turned traditional TV into a performing platform that will convince Italian marketers to invest more in Advanced TV channels. So, how do these Advanced TV drivers align with marketers' current priorities?

In your opinion, why would you invest in Advanced TV advertising?

Source: CoLab for Freewheel, European Advanced TV Uncovered, July-August 2021

	Advertisers	Agencies
Better manage frequency of exposure to my traditional linear TV campaign	53%	42%
Advanced audience targeting techniques it offers	47%	44%
I can purchase it in one single transaction in addition to traditional linear TV	42%	31%
Better consumer identity data at the individual level vs. household level	39%	29%
Extend the reach of traditional linear TV campaigns	33%	58%
Because it is proven to drive higher ad effectiveness	31%	40%

TAKEAWAY 3

Advanced TV delivers on Italian marketers' priorities

After a challenging year, almost two-thirds (63%) of Italian marketers surveyed rank **customer acquisition as their highest priority**. For the year ahead, our survey indicates that Italian marketers would rather focus on long-term campaign objectives such as: customer acquisition (63%) revenue growth (43%) and customer loyalty (31%) to sustain. As this requires top-funnel marketing, **reach and creative** are now considered by surveyed marketers as the main drivers of campaign effectiveness.

Top marketing priorities

Source: CoLab for Freewheel, European Advanced TV Uncovered, July-August 2021

Acquiring new customers	63%
Growing revenues	43%
Increasing customer loyalty	31%
Retaining existing customers	30%
Gathering customer data	27%
Driving ROI	26%
Building brand health	26%
Meeting short term business objectives	25%
Building market share	20%

TAKEAWAY 4

Measurement and optimisation should support marketers' top priorities

Italian marketers surveyed's biggest focus for Advanced TV measurement is to access insights that can inform **in-flight campaign optimisations**. Advanced TV arguably provides more attributable audience and effectiveness data than standard linear TV, and ensuring Italian marketers can utilise this should help to further Advanced TV's growth.

What matters most to you when measuring your marketing campaigns?

Source: CoLab for Freewheel, European Advanced TV Uncovered, July-August 2021

	Advertisers	Agencies
Data can be used to optimise the performance of my advertising campaign in-flight	36%	42%
Measure campaign ROI (drive to web/store, client acquisition...)	36%	40%
That I have access to deterministic exposure data	33%	36%
The accuracy of campaign measurement data	31%	33%
Exposure and audience data are unified across screens (e.g C-Flight)	31%	18%
Measurement data can be integrated with other measurement data sources (e.g brand trackers & sales panels)	28%	27%
Campaign results are certified by an independent trusted 3rd party	28%	22%
Data is consistent and comparable across all video inventory sources	14%	33%

Additionally, **increasing revenue** is Italian agencies and advertisers surveyed's second most important marketing objective after **customer acquisition**, so it's no surprise **measuring campaign ROI is a key priority**.



Conclusion

Italian marketers surveyed are more bullish than their counterparts in France, Spain, Germany and UK when it comes to their outlook for Advanced TV. If the wider ecosystem supports their measurement needs, the landscape could progress even further in the coming year. As it stands, the Italian Advanced TV market should be primed for rapid growth. Check out marketers' perspectives on Advanced TV in the other European regions that participated in our study:

UK

France

Germany

Spain

*The same study was also conducted by CoLab Media Consulting for FreeWheel, in: Germany (100 marketers), France (127 marketers), UK (102 marketers) and Spain (127 marketers).



Want to know more?

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