ExchangeWire
Insights & Attitudes

The Future of UK Advertising

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Contents

" **It's really important that publishers work with the buying teams in the agencies to ensure that there is that alignment on what the desired audiences are up-front, and if there are any guard rails that need to be in place.** "

— Suzy Ryder
Chief Digital Officer, OMD UK

In association with: **share**through

Key findings

63%

publishers believe in excess of 63% of their sales uses behavioural targeting

81%

The overriding majority of publishers plan to adopt third-party identifiers following the deprecation of the third-party cookie.

On average, behavioural targeting and cross-site tracking underpins 35.8% of UK media spend and media sales.

- There is a dramatic difference in perception of how much media spend and sales is underpinned by behavioural targeting and cross site tracking, with brands on average suggesting just 14% of their spend is targeting in this manner, while publishers believe in excess of 63% of their sales uses behavioural targeting.

Increasing brand awareness & viewability was the most important factor across all surveyed company types, followed closely by user engagement.

Strong differences seen in publisher vs brand marketer attitudes to programmatic investment, with brands more bearish on increasing programmatic investment in all channels than publishers and agencies.

- Scaled brands and agencies are much more optimistic about investing in programmatic than their start-up counterparts.

The UK advertising industry is cautiously optimistic on its readiness for the cookieless future, with an average scoring of 5.4 out of a maximum of 10.

- A large proportion (45%) of marketers who rated their ability to adapt to a cookieless future as 6 or less are unsure as to how to approach this new environment.

- The overriding majority (81%) of publishers plan to adopt third-party identifiers following the deprecation of the third-party cookie.

- Publishers which are building, or have built, first-party audiences are largely split on whether to make them available programmatically.

Within the next year, the majority of UK market participants are likely to prioritize ad tech partners which decrease the carbon footprint of their products.

- 19.6% of respondents are unlikely to factor carbon footprint into their ad tech partner selection (rating of 3 or less), while 40.1% are highly likely to take this into account (rating of 8 or more).

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Percentage of media spend/sales relying on cross-site tracking

On average, behavioral targeting and cross-site tracking underpins 35.8% of UK media spend and media sales. However, there is a dramatic difference in perception of how much media spend and sales is underpinned by behavioral targeting and cross site tracking, with brands on average suggesting just 14% of their spend is targeting in this manner, while publishers believe in excess of 63% of their sales uses behavioral targeting. Agencies intriguingly occupy a middle position, estimating 43% of their managed budget is directed towards behavioral and cross-site tracking.

Figure 1: Percentage of media spend / media sales currently relying on behavioural targeting and cross-site tracking — by company

● AGENCY   ● BRAND   ● PUBLISHER

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Suzy Ryder, chief digital officer at OMD UK, offers a potential explanation for this dichotomy, "One of the reasons there's such a difference in perception is probably a lack of visibility, which is quite difficult to manage across the buy-side, as we seek to access audiences across such a large ecosystem.
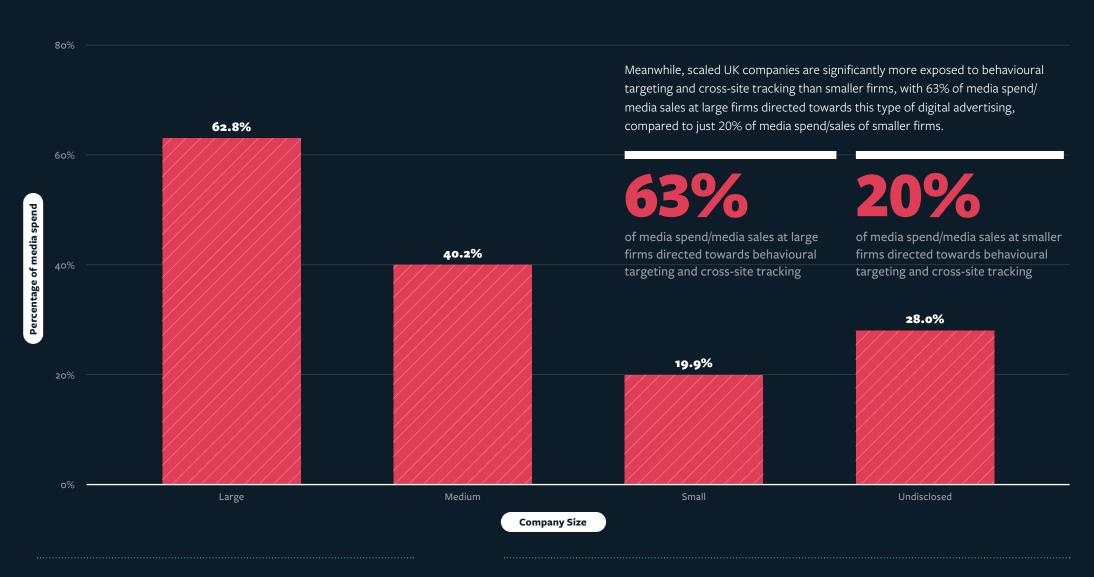
It doesn't surprise me that publishers are probably overestimating the amount of data applied on the buy side because they get such a limited view on what targeting is being applied on the DSP side. When publishers see restricted delivery on certain deals, it's often because there's many different hygiene factors that could be limiting ad selection, even before that audience buying is applied. That could be anything from Prebid settings; avoidance of buying non-brand suitable content; first-party data exclusions; limitations in the formats available; or frequency capping, just to offer a few examples."

Ryder adds, "It's really important that publishers work with the buying teams in the agencies to ensure that there is that alignment on what the desired audiences are up-front, and if there are any guard rails that need to be in place. The publisher audiences applied in the SSP will be a great way for publishers to really maximise their own audience data, but it will definitely involve more work with agencies and client teams to make sure that the collection and the use of that data really aligns with the risk threshold, in terms of how they feel comfortable using different types of personal data."

"**When publishers see restricted delivery on certain deals, it's often because there's many different hygiene factors that could be limiting ad selection, even before that audience buying is applied. That could be anything from Prebid settings; avoidance of buying non-brand suitable content; first-party data exclusions; limitations in the formats available; or frequency capping, just to offer a few examples.**"

— **Suzy Ryder**
Chief Digital Officer, OMD UK

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Figure 2: Percentage of media spend / sales currently relying on behavioural targeting and cross-site tracking — by company size

Meanwhile, scaled UK companies are significantly more exposed to behavioural targeting and cross-site tracking than smaller firms, with 63% of media spend/ media sales at large firms directed towards this type of digital advertising, compared to just 20% of media spend/sales of smaller firms.

63%
of media spend/media sales at large firms directed towards behavioural targeting and cross-site tracking

20%
of media spend/media sales at smaller firms directed towards behavioural targeting and cross-site tracking

Percentage of media spend

- 80%
- 60%
- 40%
- 20%
- 0%

Large	Medium	Small	Undisclosed
62.8%	40.2%	19.9%	28.0%

Company Size

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Importance of components in digital advertising

Increasing brand awareness and viewability was the most important factor across all surveyed company types, followed closely by user engagement.

Publishers gave equal weighting to maximizing cookieless targeting capabilities to increasing brand awareness (both 8.4), however, this was marked as least important by brands (4.5). Increasing user engagement and time spent with ads was the leading priority for large- (8.9) and medium-sized (8.1) marketers, while maximizing brand awareness was the leading priority for smaller brands and their agency partners (6.1).

Richard Ottoy, general manager EMEA at Sharethrough, outlines why viewability and engagement were rated so highly by brand and agency marketers, stating, "For me, this all comes down to trust. Does the advertiser have complete trust that their ad is going to appear against the intended user and environment? Unfortunately the answer often is, no they don't. To my knowledge, viewability or attention has never really been brought into question in other mediums. Advertisers have complete trust that if they buy an ad in a magazine against a piece of content, it will appear there. Similarly, in television, if they buy an ad to appear within a commercial break, it's going to appear there and if it doesn't, they don't pay for it.

"Does the advertiser have complete trust that their ad is going to appear against the intended user and environment? Unfortunately the answer often is, no they don't. To my knowledge, viewability or attention has never really been brought into question in other mediums. Advertisers have complete trust that if they buy an ad in a magazine against a piece of content, it will appear there."

— Richard Ottoy
General Manager, EMEA, Sharethrough

In association with: **share**through

"Unfortunately in digital, that's not the case. The barriers to entry are far too low, and over the years it's become very easy for someone to create a website, pretend that the environment is something that it isn't, and of course not have human eyeballs looking at that content in an effort to attract ad dollars. I think it's only natural that, as a result of that, buyers have started to look at other metrics like viewability. Largely, it's the job of the creative to grab the attention of the user, while it's the job of the publisher and the publisher's partners to ensure that the ad is going to appear against its intended user and environment.

"Maybe, existing viewability metrics need to be revisited. Arguably, 50% of an ad appearing for one second in front of a given user, regardless of the creative, is probably going to struggle to grab the attention of the user. However, the letter of the law states, that is a billable impression and has to be paid for. A natural evolution is to start to look at attention metrics, making sure those ads have been seen, and that the user has shown attention to it. We need to build more trust. Do we need to become more regulated as an industry to build that trust? We're starting to see that with various privacy regulations coming in, and I think it's inevitable that we will become a regulated industry at some point, but it's going to take a lot of time.

"In the meantime, brands and agencies, and we're starting to see it now more as well with publishers, over the next 12–24 months are going to have fewer and more trusted partnerships where they can be much deeper with those partners to ensure that the ads are being delivered against the intended user.
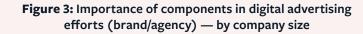
"**We'll also start to see more self-regulation as well, such as things like Tag TrustNet, where participants are expected to send log-level data through to the platform so that the supply chain can be audited down to the impression level. This was borne out of the 2020 PWC/ISBA supply chain study, where 15% of advertising spend was unaccounted for.**"

— **Richard Ottoy**
General Manager, EMEA, Sharethrough

In association with: **share**through
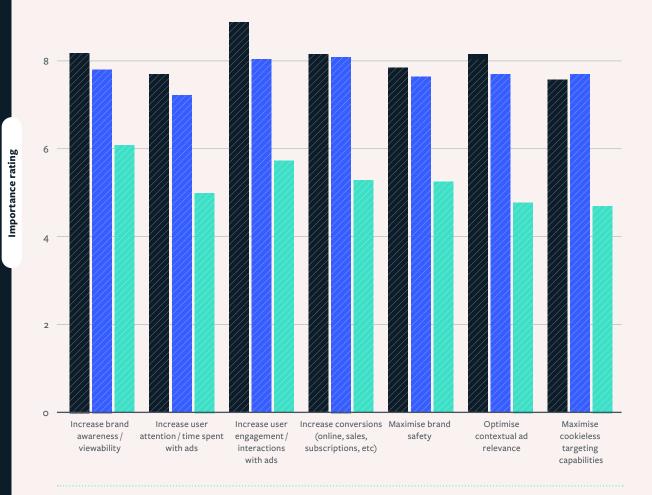
![ExchangeWire — Insights & Attitudes]

Despite their greater exposure to behavioural targeting and cross-site tracking, maximising cookieless targeting capabilities was the least important component for large brands according to the study (7.6). Contrastingly, large publishers rated maximising cookieless targeting capabilities as one of the most important components (9.1), alongside increasing brand awareness for their advertising partners (9.2).

Again strong differences were observed between publisher and brand attitudes, with publisher component ratings all substantially higher than equivalent brand ratings, with agencies again occupying a middle position.optimisation less favoured. Meanwhile, privacy-compliant targeting is among the leading factors behind UK brand use of AI.
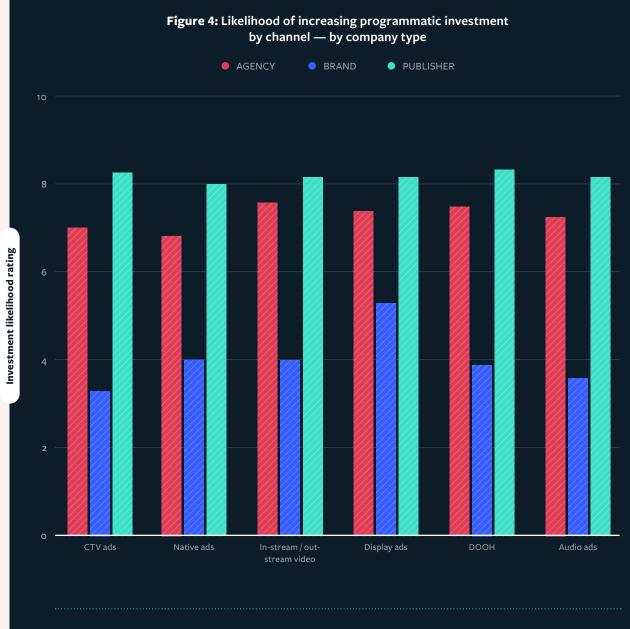

Figure 3: Importance of components in digital advertising efforts (brand/agency) — by company size

● LARGE   ● MEDIUM   ● SMALL

Programmatic advertising formats

Strong differences were again seen in publisher vs brand marketer attitudes, with brands more bearish on increasing programmatic investment than publishers and agencies. Brands are also being more strategic with their programmatic investments, with display ads (5.3) more favoured as we move into the second half of 2022 than CTV ads (3.3).

Scaled brands and agencies are much more optimistic about investing in programmatic than their start-up counterparts. Display is heavily favoured by all groups. Meanwhile marketers at larger firms are looking towards in-stream and out-stream video, while DOOH is being explored more by firms with revenue within the range of £10m-£100m.

Figure 4: Likelihood of increasing programmatic investment by channel — by company type

● AGENCY   ● BRAND   ● PUBLISHER

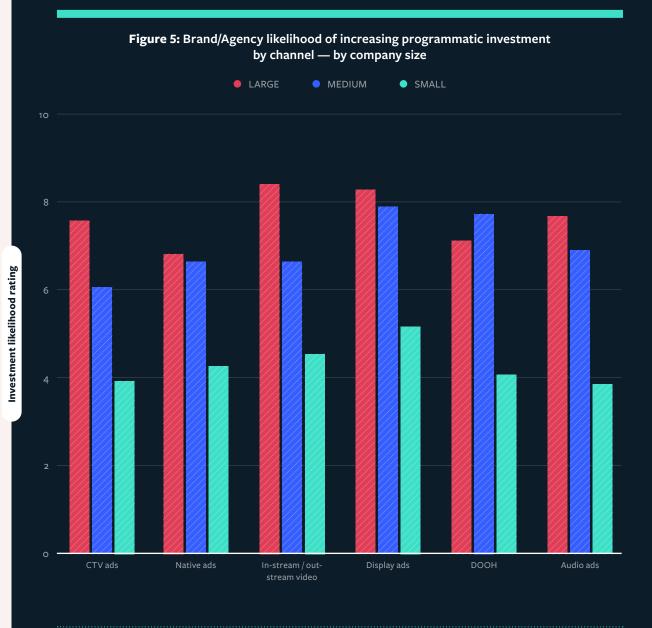In association with: **share**through

Speaking on why the market is favouring display, Ryder says, "Display is very much viewed as the channel that has the scale, but I was genuinely quite surprised to see the result of the survey, because for us, while we continue to see investment in programmatic increase, the growth is coming from video and CTV rather than from display.

I think that that will continue to be the case for a while. We have made huge advancements in terms of the transparency that we're able to offer, and maybe that's why there is such a hugely warm feeling towards display as an activational channel within programmatic. We are able to give the brands that we work with a lot more information and exposure into how that particular ecosystem is working and much more transparency into that supply side.

"Digital in general, but display in particular, is going to offer a lot of agility and flexibility to brands, which has probably been quite important over the last couple of years in particular. Display offers that scale and it offers that opportunity to reach new audiences and bring them closer to your brand, as opposed to search, which is about reaching people that are already demonstrating an interest."

Similarly, large publishers are looking to heavily increase their programmatic investment across all channels, with CTV especially favoured. By contrast, smaller publishers are generally not looking towards CTV, and are instead focusing towards native, display, and DOOH units.

Figure 5: Brand/Agency likelihood of increasing programmatic investment by channel — by company size

Readiness for the cookieless future

The UK advertising industry is cautiously optimistic on its readiness for the cookieless future, with an average scoring of 5.4 out of a maximum of 10.

This cautious optimism is echoed by Ottoy, "It shows that the market is working towards how we can survive post third-party cookies. It also tells me that we're probably not going to have a repeat of the GDPR when that hit in May 2018, when everybody went full ostrich and did nothing until the deadline, then ran around trying to figure out how they maintain their revenue. So I'm feeling quite optimistic about that score.

"However, the industry is still so reliant on third-party cookies, that until they've actually gone, we're not going to see any sort of big improvements in this area. Even when third-party cookies have gone, there's going to be a lot of testing and learning that needs to be done by all corners of the industry to understand which solutions provide scale and performance. If you're a publisher, there's going to be a lot of siloed demand coming through, which they will need to support in order to try and maintain their revenue.

> "There's going to be a lot of testing and learning that needs to be done by all corners of the industry to understand which solutions provide scale and performance"

— **Richard Ottoy**
General Manager, EMEA, Sharethrough

This is going to be in the form of first-party authenticated solutions where you can match your audience data with an advertiser. Obviously there's various third-party identity solutions, which need to be supported because a buyer may want to use a particular ID for targeting purposes. Those identity vendors will also be bringing demand as well through their own sales efforts, which could be quite attractive to publishers.

"We're also all looking at what Google's going to build, which looks like it's going to be in the form of a cohort solution, where publishers can make their audiences available within the various cohorts for buyers to target. A cohort solution is the right way of thinking, but the cynic in me says that Google is gonna be marking everybody's homework. Google will be telling everybody who within a particular cohort has converted. Will those same cohorts perform very differently through a Google stack versus a non-Google stack?. I think we probably all know the answer to that."

Despite having the lowest percentage of media sales relying on behavioural targeting and cross-site tracking according to survey results, brands are most pessimistic in terms of their readiness for adopting cookieless advertising approaches, at just 4.1 compared to agencies (7.3) and publishers (8).

Figure 6: Readiness to adopt a cookieless and
human-centric advertising approach

Readiness Rating

Agency

7.3/10

Readiness Rating

Brand

4.1/10

Readiness Rating

Publisher

8.0/10

Likewise, despite being more exposed to behavioural and cross-site tracking, large brands and agencies
are much more optimistic (8.1) about their ability to navigate the deprecation of identifiers across mobile
and display platforms than medium-sized (6.6) and small (4.5) counterparts.

45%

A large proportion (45%) of marketers who rated their ability to adapt to a cookieless future as 6 or less are unsure as to how to approach this change

20%

of this subset cited additional training as their preferred route to navigating the new environment

A large proportion (45%) of marketers who rated their ability to adapt to a cookieless future as 6 or less are unsure as to how to approach this change, with one respondent concerningly writing, "We have no idea how to tailor advertising beyond the use of cookies, it's too ingrained in our business practice."

Meanwhile, 20% of this subset cited additional training as their preferred route to navigating the new environment. A collaborative cross-industry approach between industry bodies, agencies, and technology partners, to bring marketers via education and dedicated training is recommended to reassure them of their prospects in the cookieless future.

Ryder echoes the importance of this education and collaboration piece, commenting, "There is constant ongoing education. As news of what's being developed in the industry evolves that will continue, and some of the recommendations may have to pivot depending on what's released. For us, the deprecation of third-party cookies is really just part of a wider movement to improve consumer privacy across the web. We very much refer to all of those different work streams at OMD under an umbrella term of "the future of addressability", which references all of those different areas that we believe are associated with the privacy-first future. That obviously includes restrictions to the use of cookies across all of those major browsers, but it also includes restrictions on mobile tracking; Google restrictions on ID level targeting; data compliance requirements; and also data ethics considerations as well.

"The phase-out of third-party cookies in Chrome, obviously that does get the majority of our time and focus at the moment because the Chrome browser has such a significant market share, but also because it's going to massively impact how we activate within programmatic media. Losing third-party cookies will fundamentally impact the way campaigns are implemented and managed by brands as they were foundational technology in enabling advertisers to track and use online behaviors such as targeting audiences. That impact will be felt not just across targeting, but also across optimisation, measurement, and attribution.

"The biggest misconception that we see is that all of those actions to prepare for cookie deprecation, as an example testing alternative targeting options, lie in media activation and therefore sit with the agency. Actually, there's so much preparation that could be required on the brand side as well, which could involve teams outside of marketing such as privacy, legal, or technology teams. This is also about making sure that they've got consent set up in an appropriate way on their digital real estate, but also making sure that they've evaluated any data they want to use within third-party activations and are comfortable with how that consent is being collected."

Ottoy added, "Suzy touched on attribution, which, for me, is still one of the key areas in all this, because one of the big unanswered questions at the moment when it comes to third-party cookie deprecation is our ability to measure the performance of campaigns. Today, a buyer has the ability to be able to identify and target an audience. They could use their own first-party data, they could use publisher first-party data, or third-party data, or a combination of those things to reach their audiences. Without third party cookies, the only way to actually measure the performance of that campaign is through emails. If this is the case, once third-party cookies have gone, then addressable audiences are going to become quite a bit smaller."

"**Without third party cookies, the only way to actually measure the performance of that campaign is through emails. If this is the case, once third-party cookies have gone, then addressable audiences are going to become quite a bit smaller.**"

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General Manager, EMEA, Sharethrough

Marketers who positively rated their ability to navigate the deprecation of identifiers attributed their confidence to a wide array of tools. These include tools from providers such as Google, Adobe, and Oracle, unspecified machine learning solutions, greater emphasis on social media, email/SMS marketing, and contextual platforms.

Figure 7: Brand/agency readiness to adopt a cookieless and human-centric advertising approach

Readiness Rating

Large

8.1/10

Readiness Rating

Medium

6.6/10

Readiness Rating

Small

4.5/10

Large publishers are most bullish on their abilities to adapt to the cookieless future, however small publishers (revenue < £10m) are more optimistic (7.3) about their abilities than publishers with revenue between £10m and £100m (6.7). While this difference is small, supply-side partners should examine how they can reassure scaling publisher houses on how to navigate identifier deprecation.

81%

The overriding majority of publishers plan to adopt third-party identifiers following the deprecation of the third-party cookie

63%

the majority (63%) of publishers plan to build, or have already constructed, first-party audiences

While first-party data has been touted as critical for future publisher growth, third-party audiences are not being eschewed by the UK market and are being used to complement first-party audiences.

In fact, the overriding majority (81%) of publishers plan to adopt third-party identifiers following the deprecation of the third-party cookie. Encouragingly, the majority (63%) of publishers plan to build, or have already constructed, first-party audiences, however, by implication, over one-third of UK publishers are not planning to build first-party audiences.

Publishers which are building, or have built, first-party audiences are largely split on whether to make them available programmatically, with 59% in favour of making their first-party audiences available programmatically and 41% against.

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Supply Path Optimisation

Supply path optimisation (SPO) has a significantly higher priority in agency programmatic buying strategies (7.1) than in brand strategies (3.5). Perhaps unsurprisingly given their heavier investment into programmatic (page 6), SPO is a higher priority for large and medium-sized brands and agencies (7.7 and 6.2 respectively) compared to smaller organisations (4.1).

Figure 8: Importance of SPO in programmatic buying strategies

● AGENCY   ● BRAND   ● GRAND TOTAL

Importance rating

Company Type

	Agency	Brand	Grand Total
Value	7.1	3.5	5.0

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Of agency and brand marketers which do not prioritise SPO in their programmatic buying strategies, the majority (79%) are not looking to allocate more resources into SPO. Suggesting other pressures, such as identifier deprecation or general constriction of resources are more preeminent here.

79%

Of agency and brand marketers which do not prioritise SPO in their programmatic buying strategies are not looking to allocate more resources into SPO

6%

Only 6% of respondents do not take the historical performance of supply-side platforms (SSPs) into account at all in their SPO analysis

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"At the end of the day, the supply path is trying to have the most direct path, so you have the most working media dollars towards buying that inventory"

— Frank Maguire
Vice President of Insights & Strategy, Sharethrough

Where SPO analyses are being performed, the historical performance of supply-side platforms (SSPs) is taken into account during the majority of investigations, with an average rating of 6.9. Only 6% of respondents do not take it into account at all in their SPO analysis. Frank Maguire, vice president of insights & strategy, Sharethrough, was highly encouraged by this finding, stating, "We work on a lot of SPO analyses directly with large holding groups and sometimes individually with brands. Usually they're pages-long worth of RFI questions about very specific details across the exchange and how direct the supply is, which is really important to making sure you have the best supply path possible.

Oftentimes though, historical performance of those SSPs is not accounted for as part of SPO. We'll then have separate conversations with brands about polling performance by those SSPs as part of the indication of who has the best supply for their advertisers. At the end of the day, the supply path is trying to have the most direct path, so you have 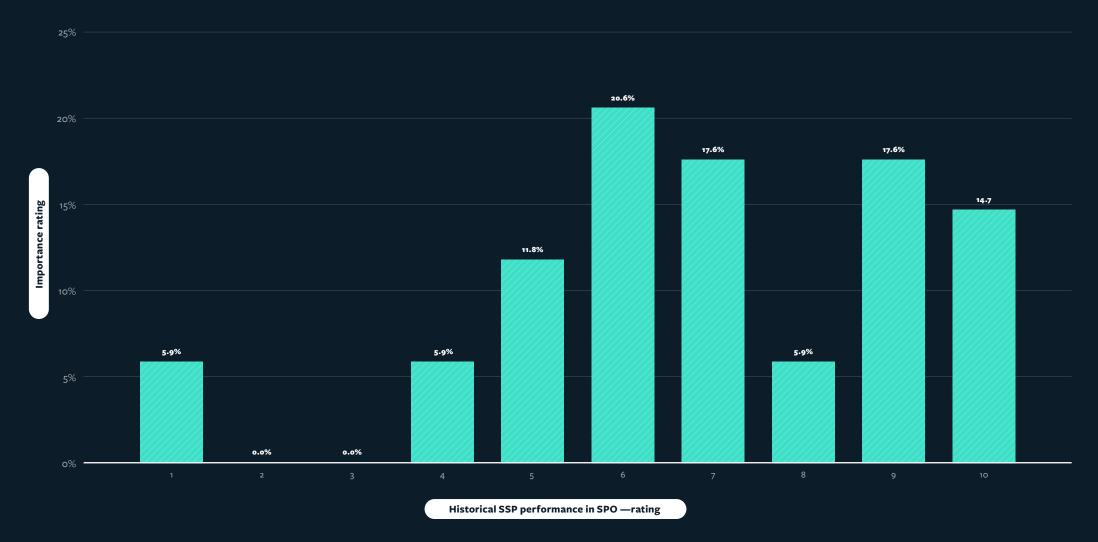the most working media dollars towards buying that inventory; so that in turn you have better ROI for you or your clients. If ads are performing better on certain SSPs versus others, that can obviously also help drive down ROI."

Figure 9: Weighting of historical performance
of SSP in SPO

Importance rating

						20.6%			17.6%	
25%										
20%							17.6%			14.7
15%					11.8%					
10%										
5%	5.9%	0.0%	0.0%	5.9%				5.9%		
0%										
	1	2	3	4	5	6	7	8	9	10

Historical SSP performance in SPO —rating

Contextual categorisation of content

The majority of surveyed publishers (74%) partner with third-parties such as MOAT, DoubleVerify and Seedtag, to create contextual categorisation of their content.

Meanwhile, a significant proportion (48%) of publishers are also manually setting up contextual keywords as key values within Google Ad Manager, though the majority of these (77%) publishers are also using third-parties to help manage the process. Finally, twenty-two percent of UK publishers are not currently creating contextual categorisation of their content. This proportion is concerningly high given the benefits of contextual categorisation go beyond offering increased data for marketer partners, thus more training may be required here to convey the available options where publishers do not have the resources to manage contextual categorisation.

74%

of surveyed publishers (74%) partner with third-parties such as MOAT, DoubleVerify and Seedtag, to create contextual categorisation of their content

63%

of publishers are also manually setting up contextual keywords as key values within Google Ad Manager

In association with: **share**through

Decreasing carbon footprint in ad tech

Within the next year, the majority of UK market participants are likely to prioritise ad tech partners which decrease the carbon footprint of their products, with an average likelihood rating of 6.2. A total of 19.6% of respondents are unlikely to factor carbon footprint into their ad tech partner selection (rating of 3 or less), while 40.1% are highly likely to take this into account (rating of 8 or more).

Commenting on the latter figure, Ryder says, "I was quite surprised to see that 40% figure. First of all, I think I expect to see a high percentage having an intention, but I think the reality of having that framework in place to be able to evaluate ad tech partners is probably going to take a long time to reach any sort of maturity. However, I think it's great that there is that intention and there are things that brands, agencies, and publishers can do now. Ultimately, while there is an enthusiasm from brands and advertisers to want to take carbon into their consideration list, they still need to make sure that their ad spend delivers on the business outcomes. And I think there could be a period of time where there is friction between those two areas."

Maguire adds, "We just recently launched Green PMPs in partnership with Scope3 to measure and offset the carbon emissions of every impression delivered. But exactly to Suzy's point, our focus is also how we do this in a way that doesn't impact or decrease the effectiveness of ads. The early results show that this is possible, which is really good news for the scalability of decreasing carbon emissions across the entire advertising supply chain.

"In tandem, we ran a consumer research study to understand whether consumers even know that generally browsing the internet impacts carbon emissions. The results showed six out of ten consumers generally have no idea, which isn't surprising in that you wouldn't assume that browsing the internet has an impact on carbon emissions unless you were familiar with data servers and everything that goes into loading a page. The interesting thing that we're starting to see is that consumers are willing to do something to help offset their carbon emissions in terms of internet browsing, including spending less time on certain sites. However, it really is up to ad tech, as that drives a lot of the back-end loading of these pages, that leads to the carbon emissions, to help offset those."
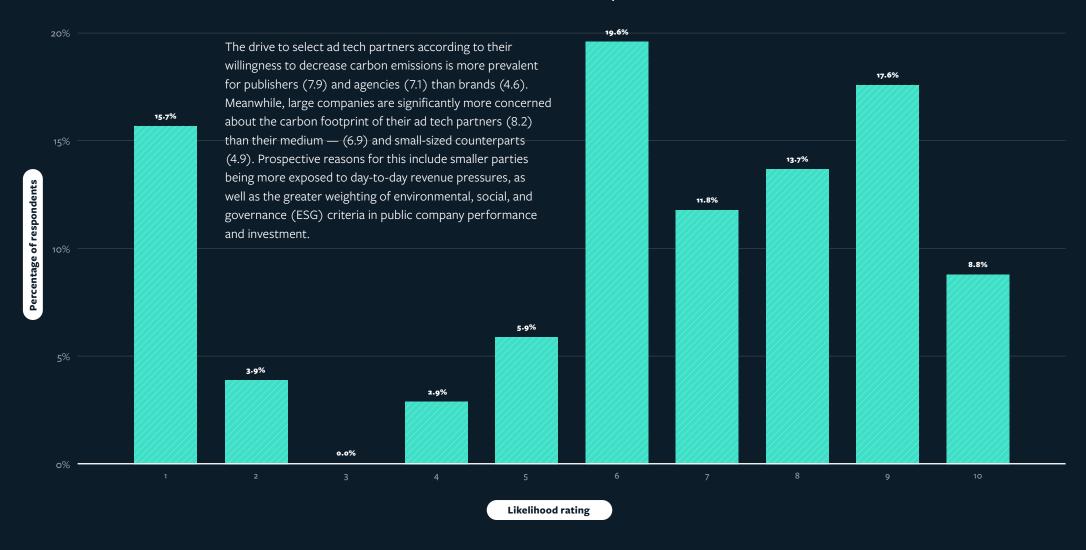
Over two-thirds of publishers (66.7%) are highly likely to factor carbon footprint into their ad tech partner selection, while nearly half of agencies (48.4%) are highly likely to take this into account. Though less immediate than the other surveyed groups, many UK brands will also be factoring carbon footprint into their partner selection, with 18.2% highly likely to take this into account over the next year.

"**The interesting thing that we're starting to see is that consumers are willing to do something to help offset their carbon emissions in terms of internet browsing, including spending less time on certain sites. However, it really is up to ad tech, as that drives a lot of the back-end loading of these pages, that leads to the carbon emissions, to help offset those.**"

— Frank Maguire
Vice President of Insights & Strategy, Sharethrough

Figure 10: Prioritisation of ad tech partners who decrease their carbon footprint

The drive to select ad tech partners according to their willingness to decrease carbon emissions is more prevalent for publishers (7.9) and agencies (7.1) than brands (4.6). Meanwhile, large companies are significantly more concerned about the carbon footprint of their ad tech partners (8.2) than their medium — (6.9) and small-sized counterparts (4.9). Prospective reasons for this include smaller parties being more exposed to day-to-day revenue pressures, as well as the greater weighting of environmental, social, and governance (ESG) criteria in public company performance and investment.

Bar chart — *Percentage of respondents* (y-axis) vs *Likelihood rating* (x-axis):

Likelihood rating	Percentage of respondents
1	15.7%
2	3.9%
3	0.0%
4	2.9%
5	5.9%
6	19.6%
7	11.8%
8	13.7%
9	17.6%
10	8.8%

Acknowledgements

This Insights & Attitudes report features thought leadership from:

- **Frank Maguire**
  Vice President of Insights & Strategy, Sharethrough

- **Richard Ottoy**
  General Manager, EMEA, Sharethrough

- **Suzy Ryder**
  Chief Digital Officer, OMD UK

ExchangeWire and Sharethrough would like to take this opportunity to thank the surveyed participants.

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ABOUT SHARETHROUGH

Sharethrough is one of the top global independent omnichannel ad exchanges. Committed to preserving an open internet with independent and accessible content funded by quality advertising, we are building a sustainable advertising ecosystem for journalists, content creators and app developers, by connecting publishers and advertisers with true technology innovation supporting all ad formats, devices, and user experiences.

For more information, please visit **www.sharethrough.com**

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The business of media, marketing and commerce

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We're always interested in any technology and business-related news globally, and in particular across EMEA and APAC. Relevant companies are encouraged to get in touch. We're also interested in hearing from PR people working with companies in any of the areas named above.

For more information, please visit **www.exchangewire.com**

SAMPLE & METHODOLOGY

The original quantitative findings in this Insights & Attitudes report was derived from a survey of 102 media and marketing professionals in the United Kingdom. Data was collected from 5th May to 7th May.