Insights&Attitudes
From ExchangeWire

The Evolution of Adtech and Martech in Europe

Insights&Attitudes

In association with StackAdapt

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Executive summary

From humble beginnings 30 years ago, the digital advertising industry has evolved at a phenomenal rate, with direct sold deals for spare inventory giving way to an ever more complex programmatic supply chain. Intertwining with the development of advertising technology (adtech), understanding and availability of data has given rise to a host of marketing technology (martech) tools. From customer relationship management (CRM) to ad verification, customer journey analytics to demand-side platforms (DSPs), the modern adtech and martech stack is a complex ecosystem.

Fast forward to today, the entire industry is at an inflection point. Despite Google's decision to place third-party cookie usage in the hands of Chrome users, consent rates are likely to be low, upturning facets such as measurement and attribution. Antitrust scrutiny on big tech platforms is likely to open opportunities for independent providers, while privacy legislation is toughening up globally. As other markets adopt stricter privacy controls, marketers within Europe have a strategic advantage through operating in an environment where privacy legislation has been in place for multiple years, while similarly European technology platforms offer solutions built from a privacy-first standpoint.

In this ExchangeWire Insights & Attitudes report, produced in association with StackAdapt, we examine how marketers across Europe are utilising adtech and martech technologies within their digital advertising campaigns, the impact these solutions have had on their businesses, and how their use is set to develop going forward.

As detailed within this report, the impact of adtech and martech solutions on the performance of digital advertising campaigns within Europe has been overwhelmingly positive, and the use of these tools is set to increase dramatically as a result of these improvements in ROI. Through the use of these solutions, marketers are capitalising on the enhanced abilities to optimise their campaigns and personalise them towards their consumers, in a privacy-compliant manner.

Key findings

- Use of adtech and martech tools within digital advertising campaigns is widespread within Europe, with all examined tools either being used currently, or planning to be used, by a minimum of 84% of respondents.
  - The use of adtech and martech tools is set to proliferate further throughout Europe, with 80% of surveyed marketers reporting that the use of these solutions will increase within their vertical over the next 3-5 years.

- Overall, the impact of adtech and or martech tools has been positive for marketers across Europe, with nearly three-quarters of respondents reporting that the use of these platforms has improved performance and ROI.
  - European marketers almost universally report that the implementation of adtech and martech tools has had a positive impact on growth and efficiency, with only 4% of respondents stating otherwise.

- Enhanced personalisation of content and ads was identified as the leading benefit of applying adtech and/or martech solutions to digital advertising campaigns across Europe.

- Marketers across EMEA believe that adtech and martech will be crucial for a wide range of digital advertising factors, with over 90% of respondents believing these solutions would have an impact in all surveyed factors.

- The cost of implementing solutions was the leading challenge to integrating adtech and martech solutions according to European brand and agency marketers by a significant margin, with 62% identifying this as a barrier.

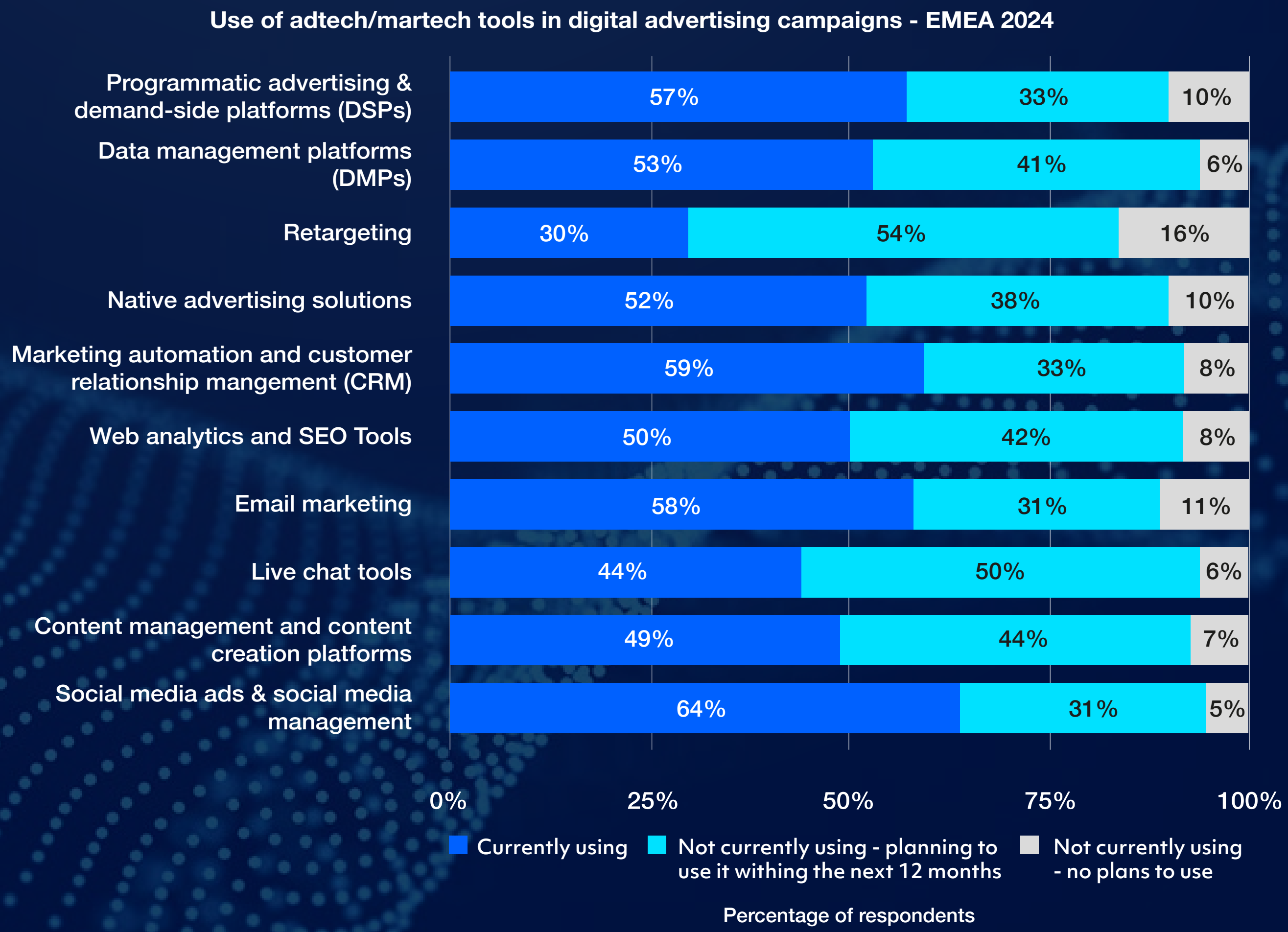
- EMEA-based marketers are significantly more likely to turn to their adtech partners than their martech partners for campaign planning and strategy guidance.

Use of adtech and martech tools

Use of adtech and martech tools within digital advertising campaigns is widespread within Europe, with all examined tools either being used currently, or planning to be used, by a minimum of 84% of respondents. Adtech/martech tools are being explored most heavily within social media, with 95% of respondents either currently using social adtech/martech tools or planning on doing so within the next 12 months, followed by email marketing and data management platforms (both 94%).

95%

of respondents are either currently using social adtech/martech tools or planning on doing so within the next 12 months



Impact of adtech and/or martech integration on advertising campaigns

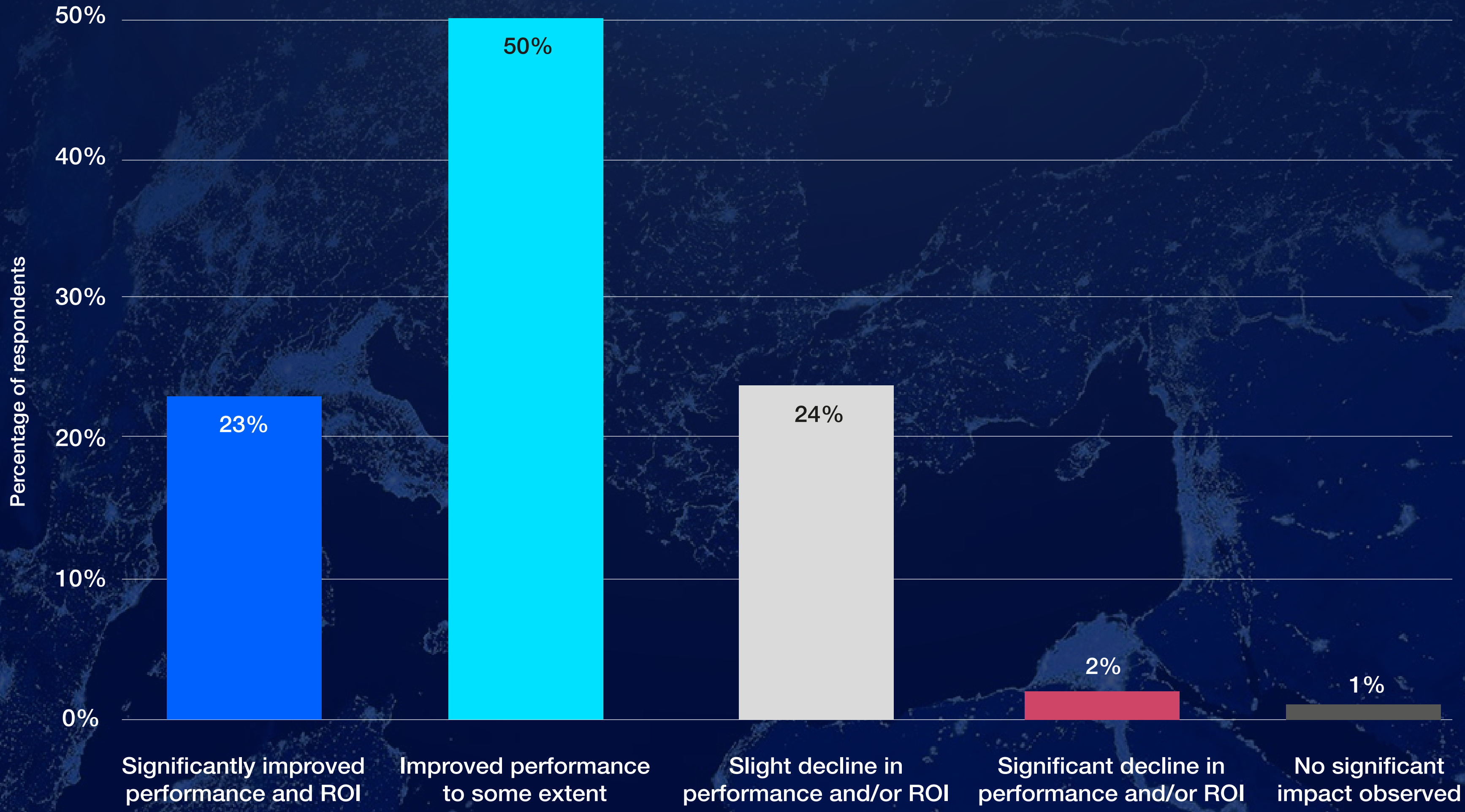
Overall, the impact of adtech and or martech tools has been positive for marketers across Europe, with 73% of respondents reporting that the use of these platforms has improved performance and ROI. Moreover, 23% of those surveyed have reported that adtech/martech integration has significantly improved their advertising campaigns.

However, 26% of those surveyed described a decline in performance associated with the introduction of adtech and/or martech solutions within their stack. Andrew Rose, VP of sales, StackAdapt, discusses how marketers should lean towards partners that offer measurable insight into their impact in order to adjust their technology stacks accordingly.

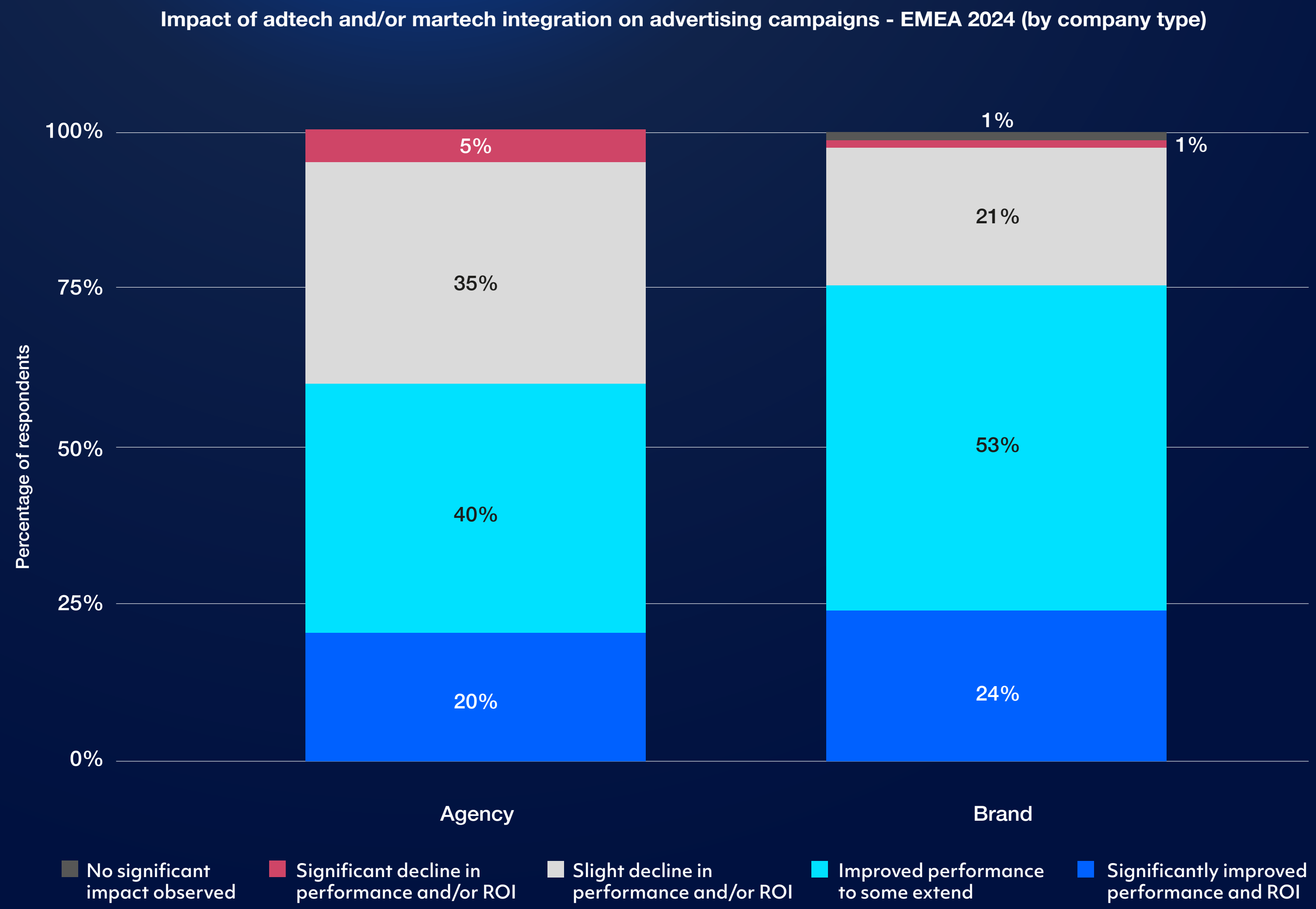
"Optimising performance requires transparent data measurement and ongoing testing to fine-tune campaigns. Marketers should prioritise partners who offer clear, actionable insights into campaign performance and a robust set of tools to measure impact and effectiveness."

- Andrew Rose, VP of Sales, Stackadapt

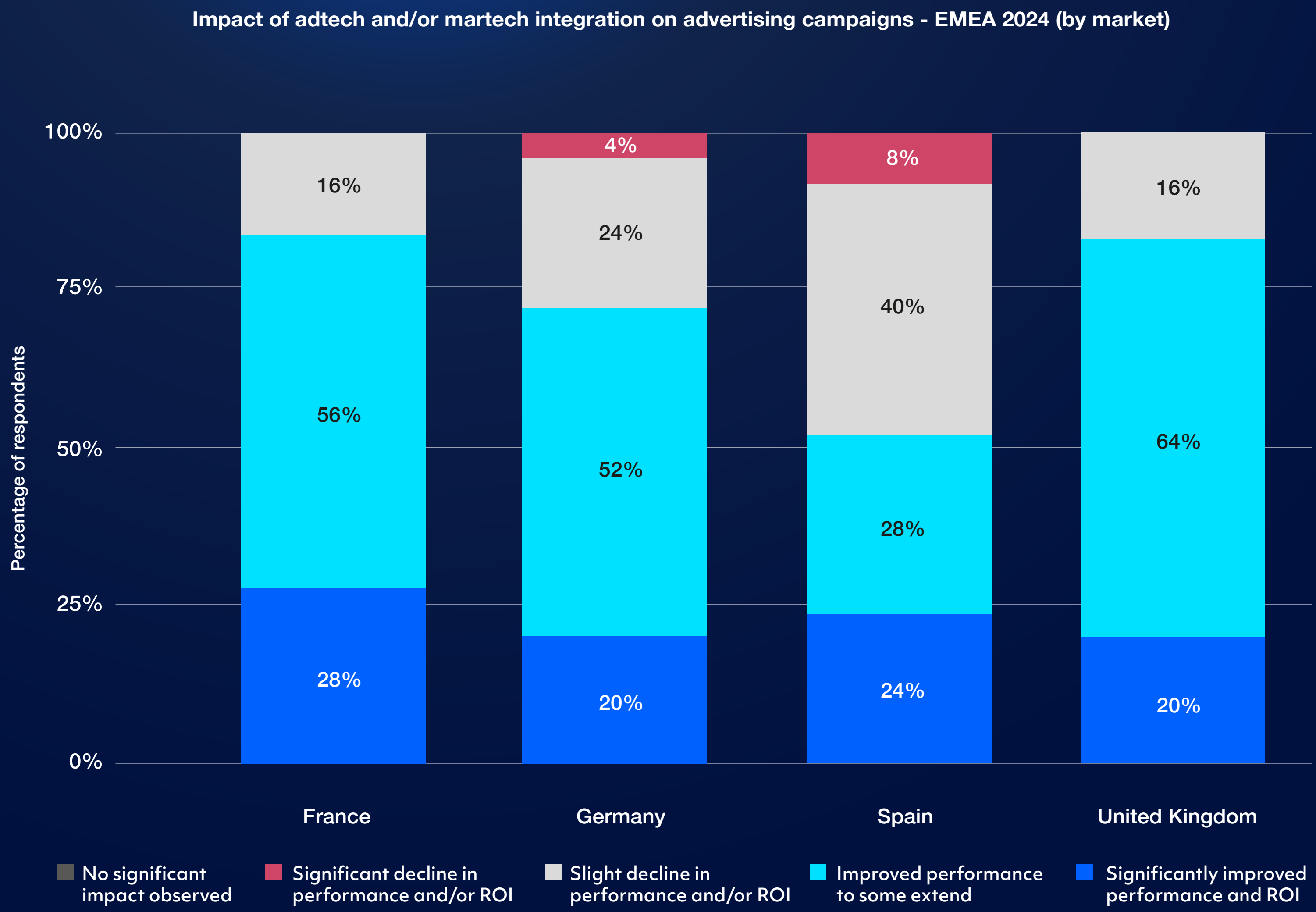
Impact of adtech and/or martech integration on advertising campaigns - EMEA 2024



Notably, brand marketers have reported a more positive impact from integrating adtech and/or martech tools into their advertising efforts than their agency counterparts. A total of 77% of brand respondents reported that adtech/martech integration had improved performance to at least some extent, compared to just 60% of agency respondents.

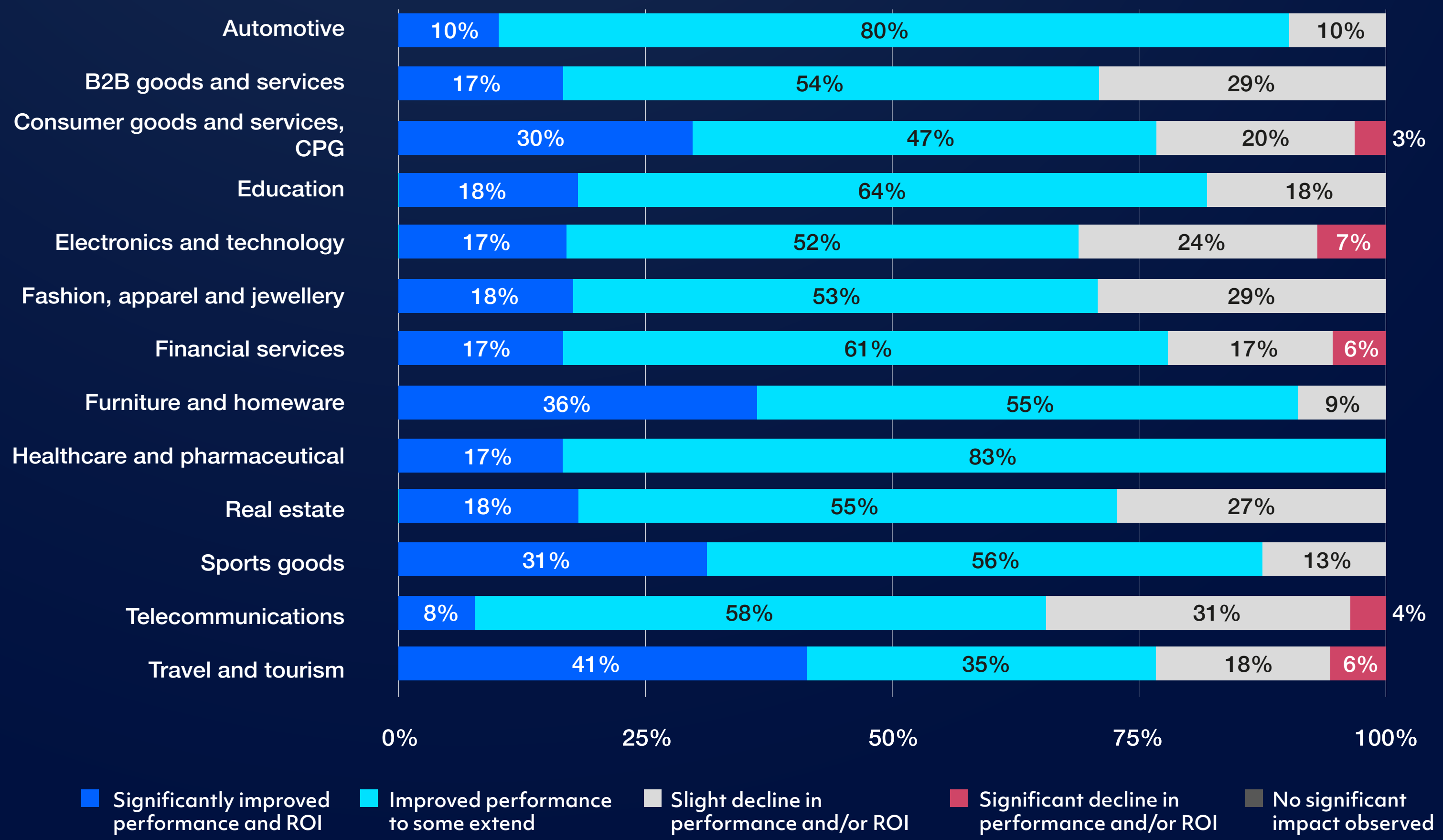


By market, respondents in France indicated that they had seen the greatest returns from incorporating adtech/martech tools into their advertising campaigns. Here, 84% reported an improvement in performance, with 28% noting a significant increase in performance and ROI. This was closely followed by the UK, where 84% reported an improvement in performance, 20% of which was a significant gain. This contrasts with Spain, where 48% of respondents reported a decline in performance, of which 8% was a significant decrease.



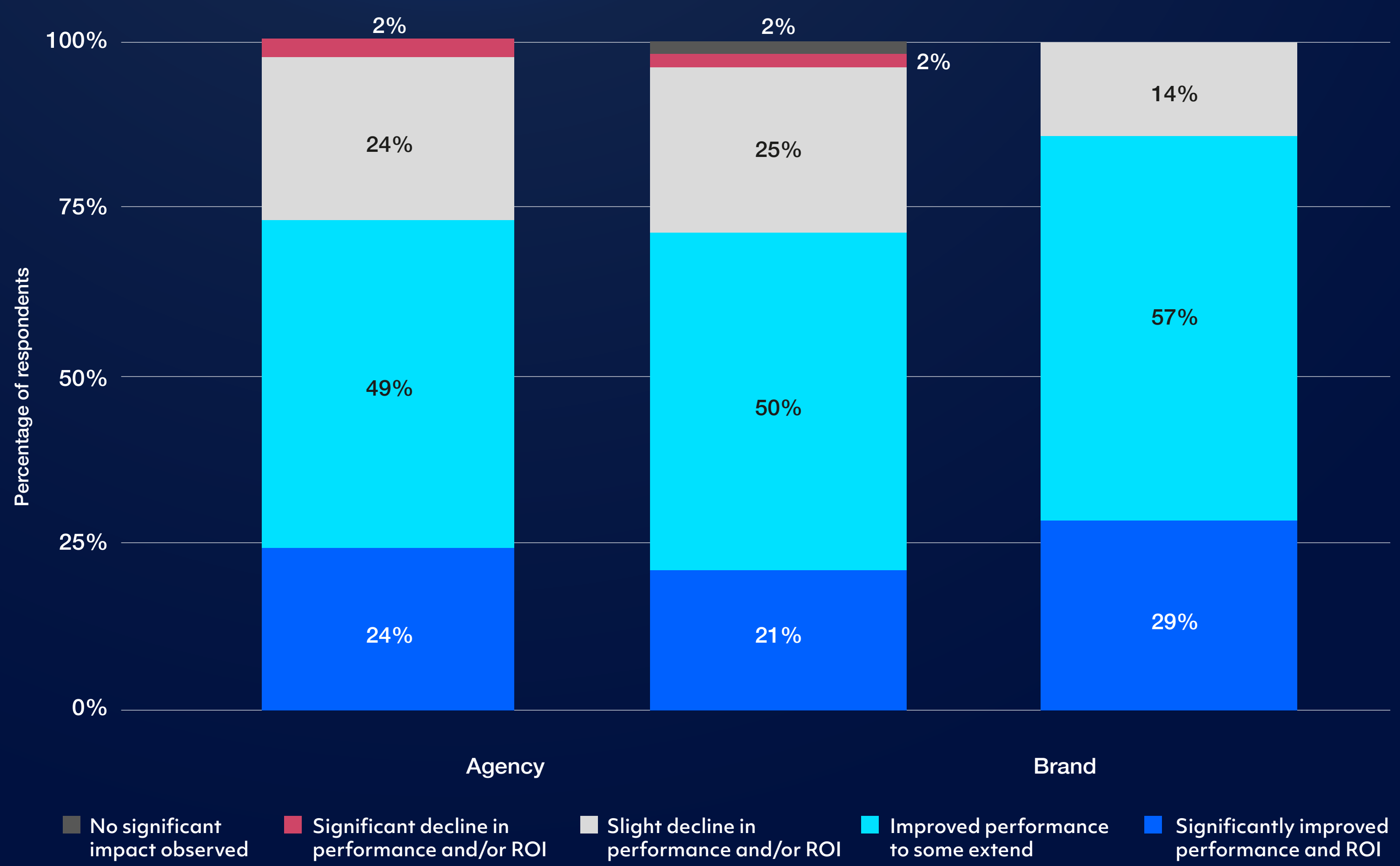
By vertical, all surveyed respondents working in the healthcare and pharmaceutical sector reported that the integration of adtech and/or martech tools has had a positive impact on their advertising campaigns. Moreover, over 41% of those working within the travel and tourism sector reported that adtech/martech integration has resulted in significantly improved advertising importance and return on investment. Additionally, 77% of surveyed finance brands reported a positive impact from the use of adtech and martech tools.

Impact of adtech and/or martech integration on advertising campaigns - EMEA 2024 (by vertical)



Small (<50 employees) companies reported the strongest gains from the use of adtech and martech tools, with nearly one-third (29%) reporting a significant improvement in performance and ROI, with 86% noting at least a slight improvement in performance.

Impact of adtech and/or martech integration on advertising campaigns - EMEA 2024 (by company size)



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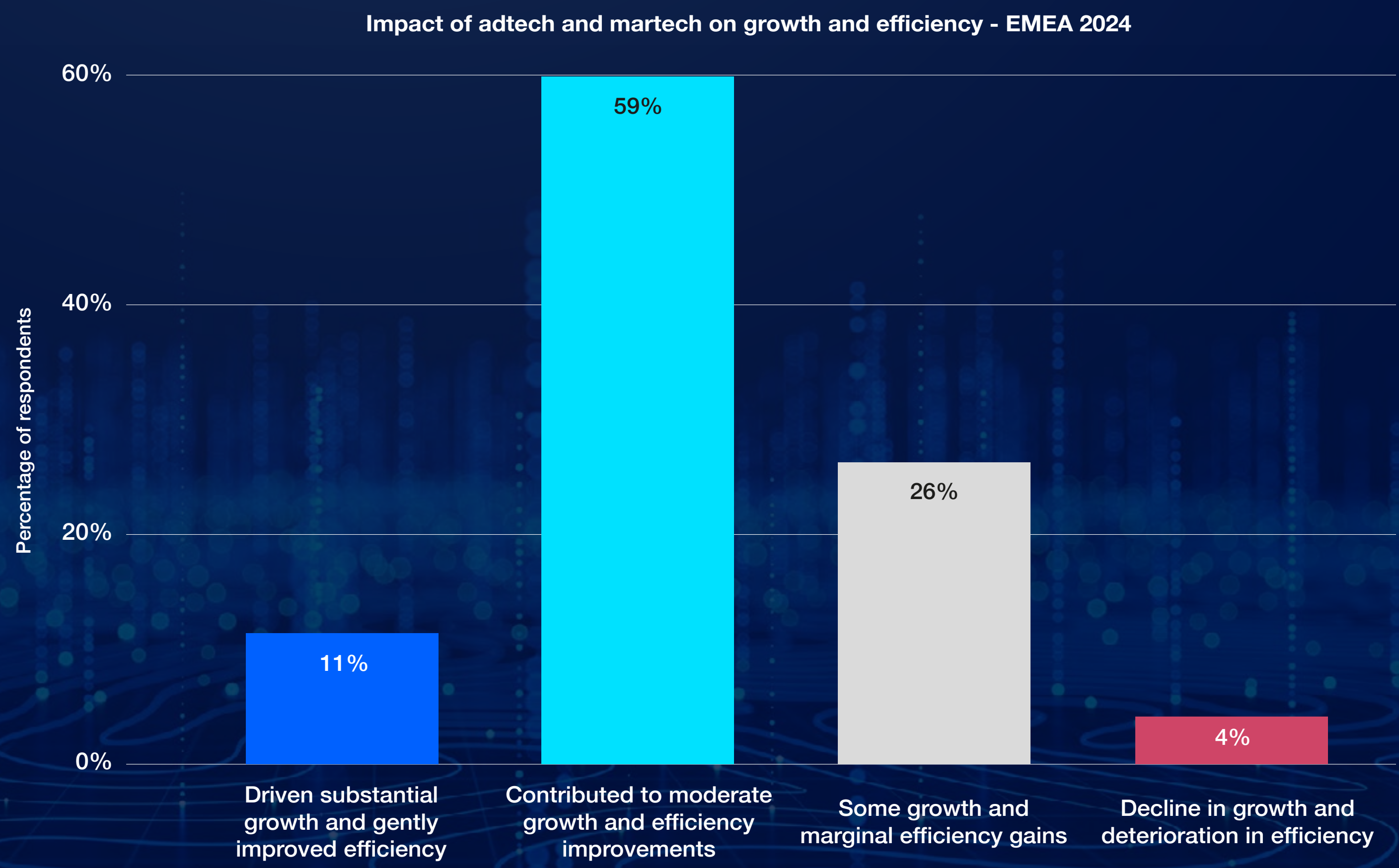
Impact of adtech and martech on growth and efficiency

European marketers almost universally report that the implementation of adtech and martech tools has had a positive impact on growth and efficiency, with only 4% of respondents stating otherwise.



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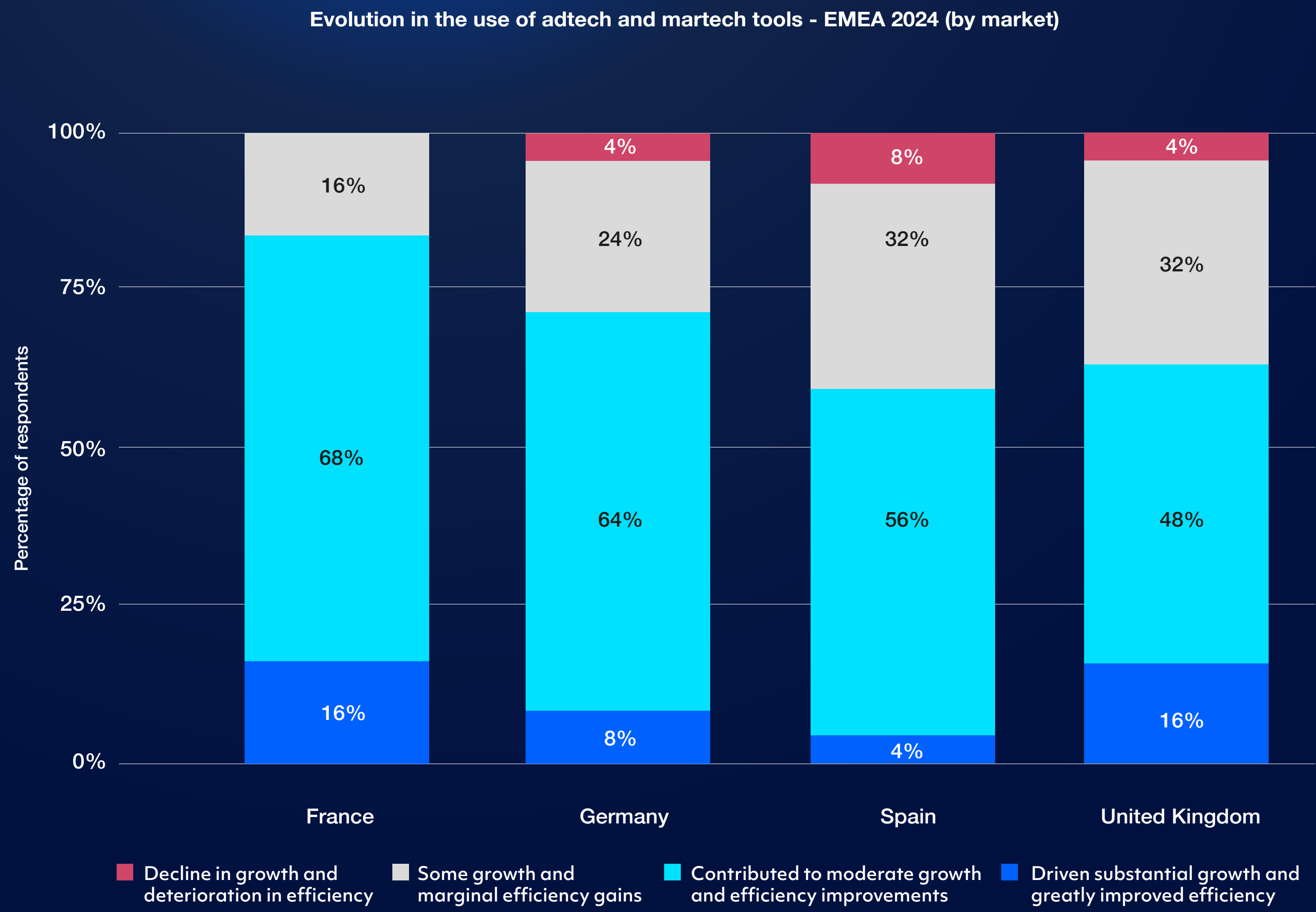
Respondents operating within France have seen the greatest benefit of implementing adtech and martech tools in terms of growth and efficiency, with all respondents reporting at least some improvement, while 16% reported substantial growth and greatly improved efficiency.

16%

of respondents in France reported substantial growth and greatly improved efficiency.



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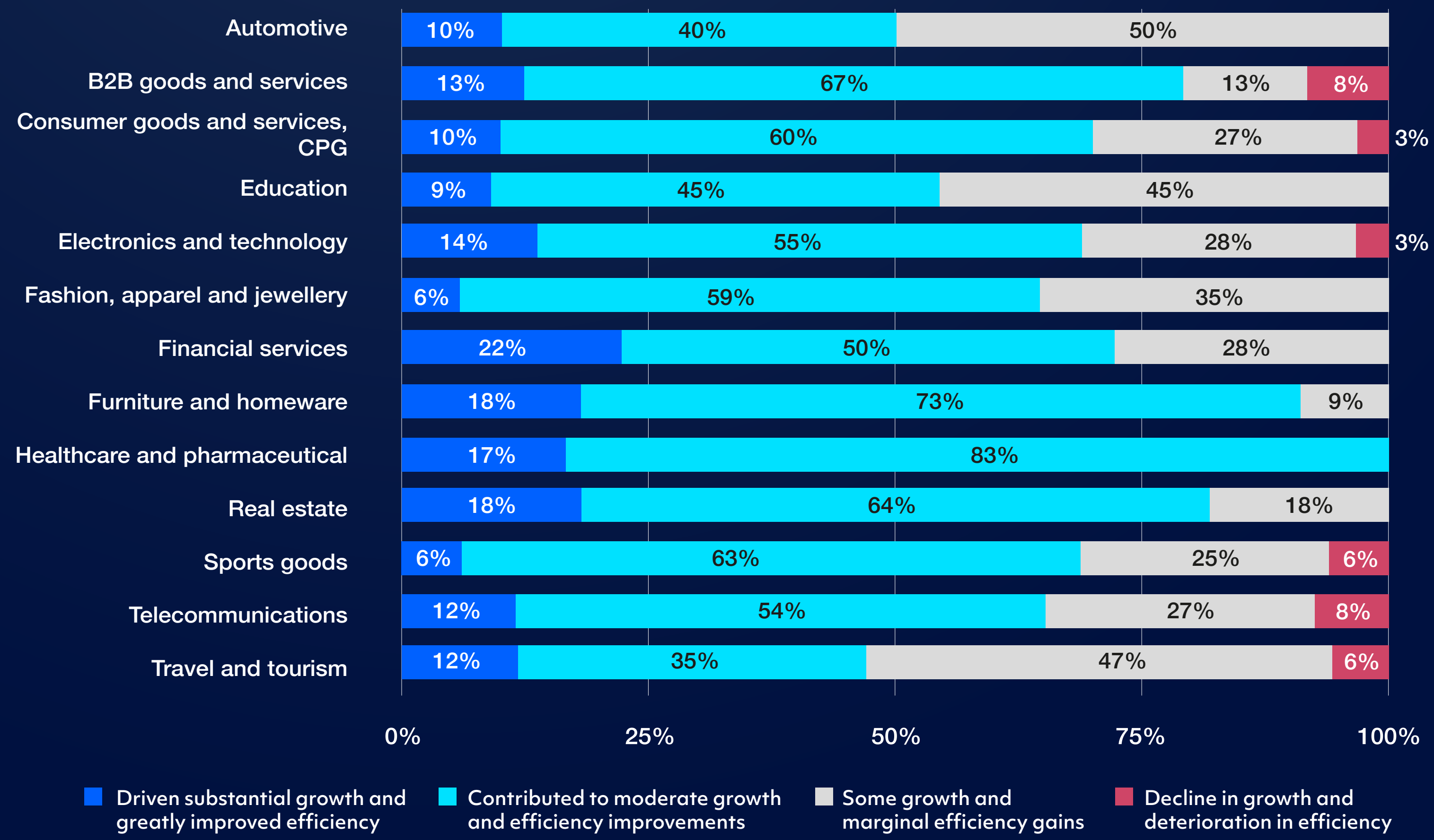
At least 92% of respondents reported growth and efficiency gains through the use of adtech and/or martech solutions in all surveyed categories, including B2B (92%); CPG (97%); financial services (100%), and travel/tourism (94%).

Impact of adtech and martech on growth and efficiency - EMEA 2024 (by vertical)

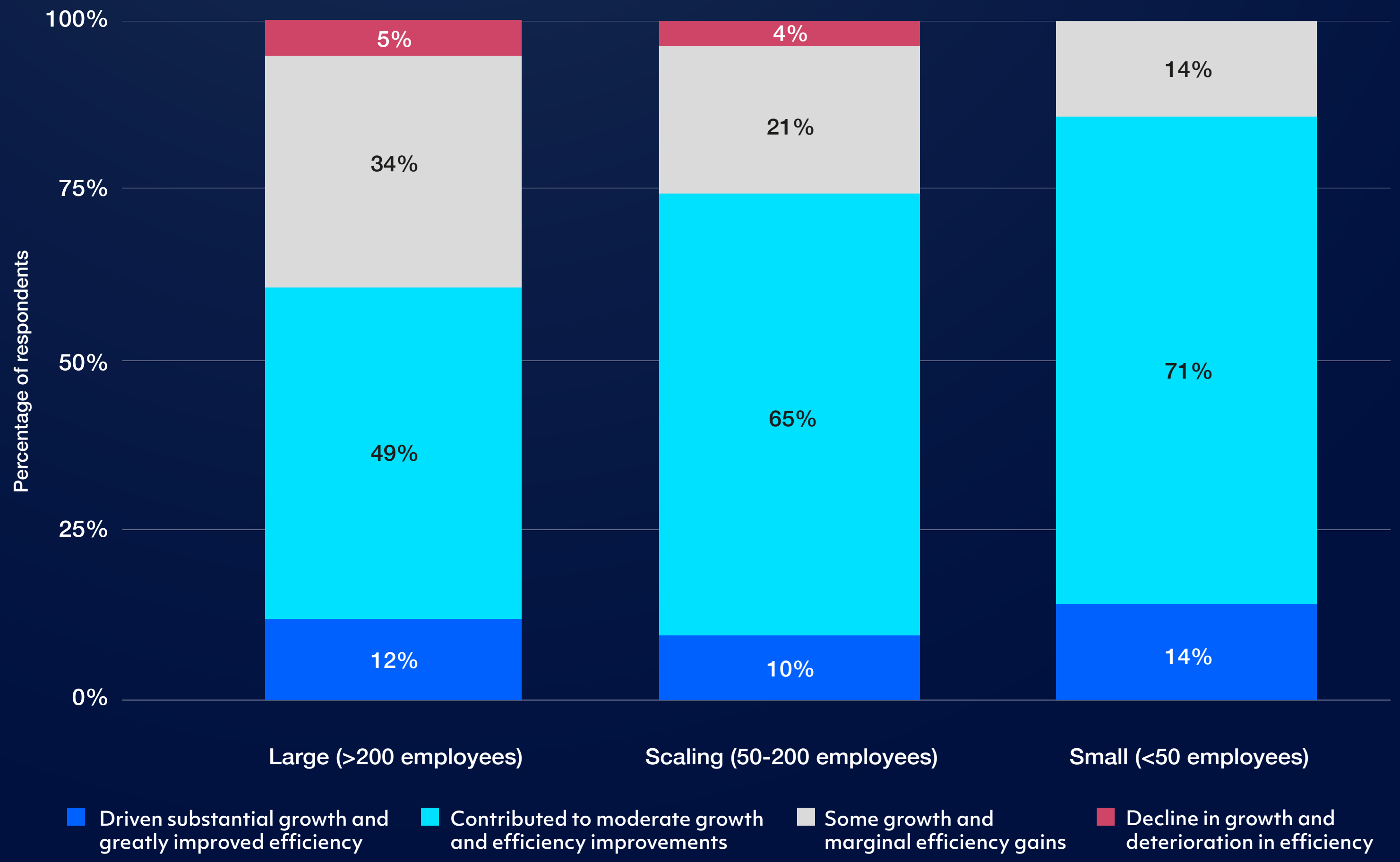


Efficiency improvements from the usage of adtech and martech solutions scales according to company size, with 85% of marketers in small (<50 employees) companies reporting at least moderate improvements to growth and efficiency, compared to 75% for scaling (50-200 employees) and 61% for large (>200 employees) companies.

85%

of marketers in small companies reported at least moderate gains in growth and efficiency by using adtech/martech tools.

Impact of adtech and/or martech integration on advertising campaigns - EMEA 2024 (by company size)



Evolution in the use of adtech and martech tools

The use of adtech and martech tools is set to proliferate further throughout Europe, with 80% of surveyed marketers reporting that the use of these solutions will increase within their vertical over the next 3-5 years, while half stated that the use of adtech and martech solutions will increase significantly within this period.

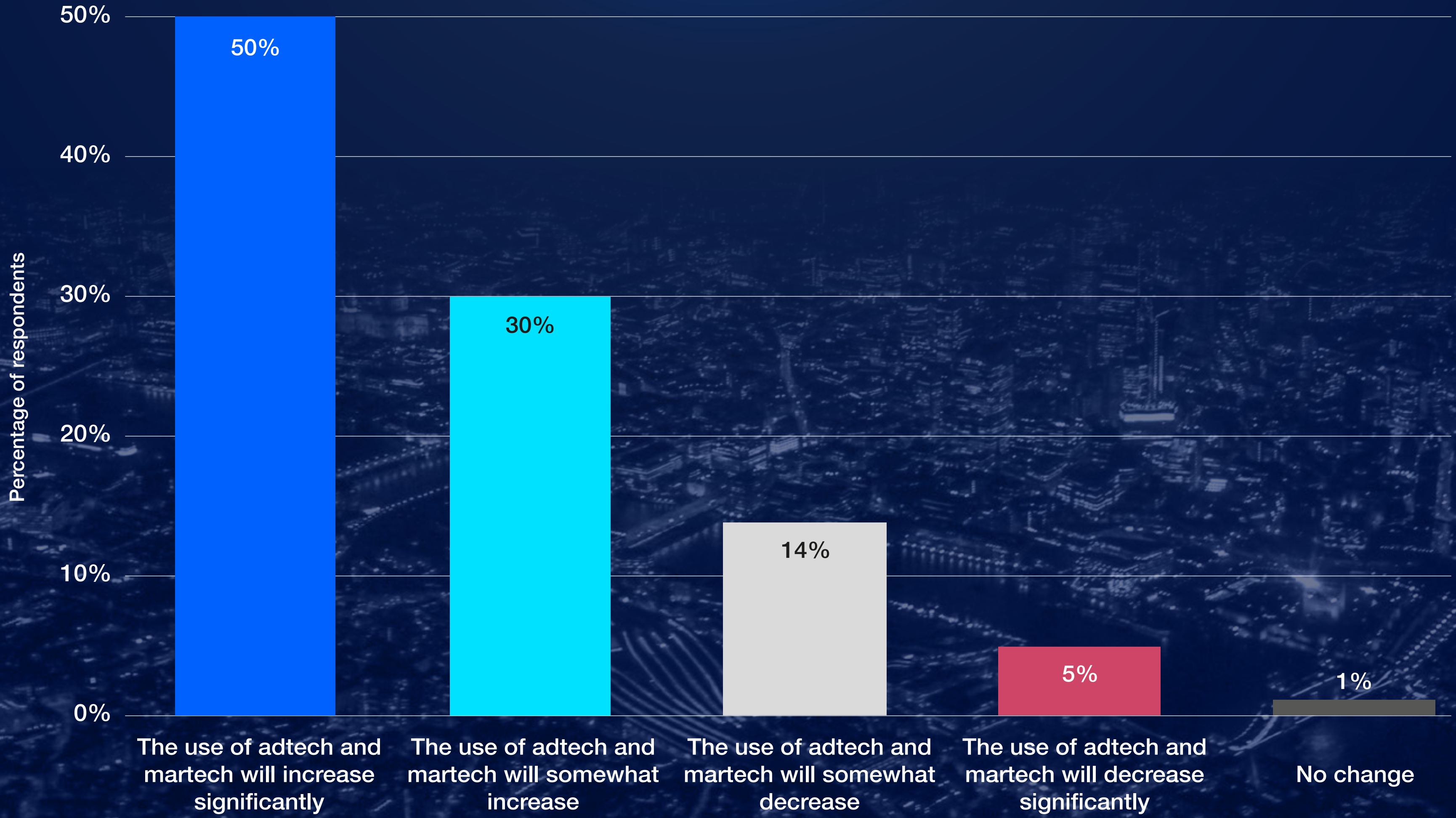
The increased use of these tools is in turn set to be fuelled by the proliferation of AI-driven technologies. Last year, research published by ExchangeWire and StackAdapt suggested that the use of AI solutions was set to increase at a similarly profusive rate, with only 2% stating that the use of AI within digital marketing would decrease. Kevin Liang, senior director, solutions at StackAdapt comments on this relationship,

> "Expect a surge in AI-driven tools, especially in personalisation and predictive analytics, as these technologies empower marketers to create highly tailored experiences at scale. Over the next 3-5 years we will see the continued convergence between adtech and martech platforms and channels, as technology works to bring marketers more cohesive end-to-end customer engagement solutions."

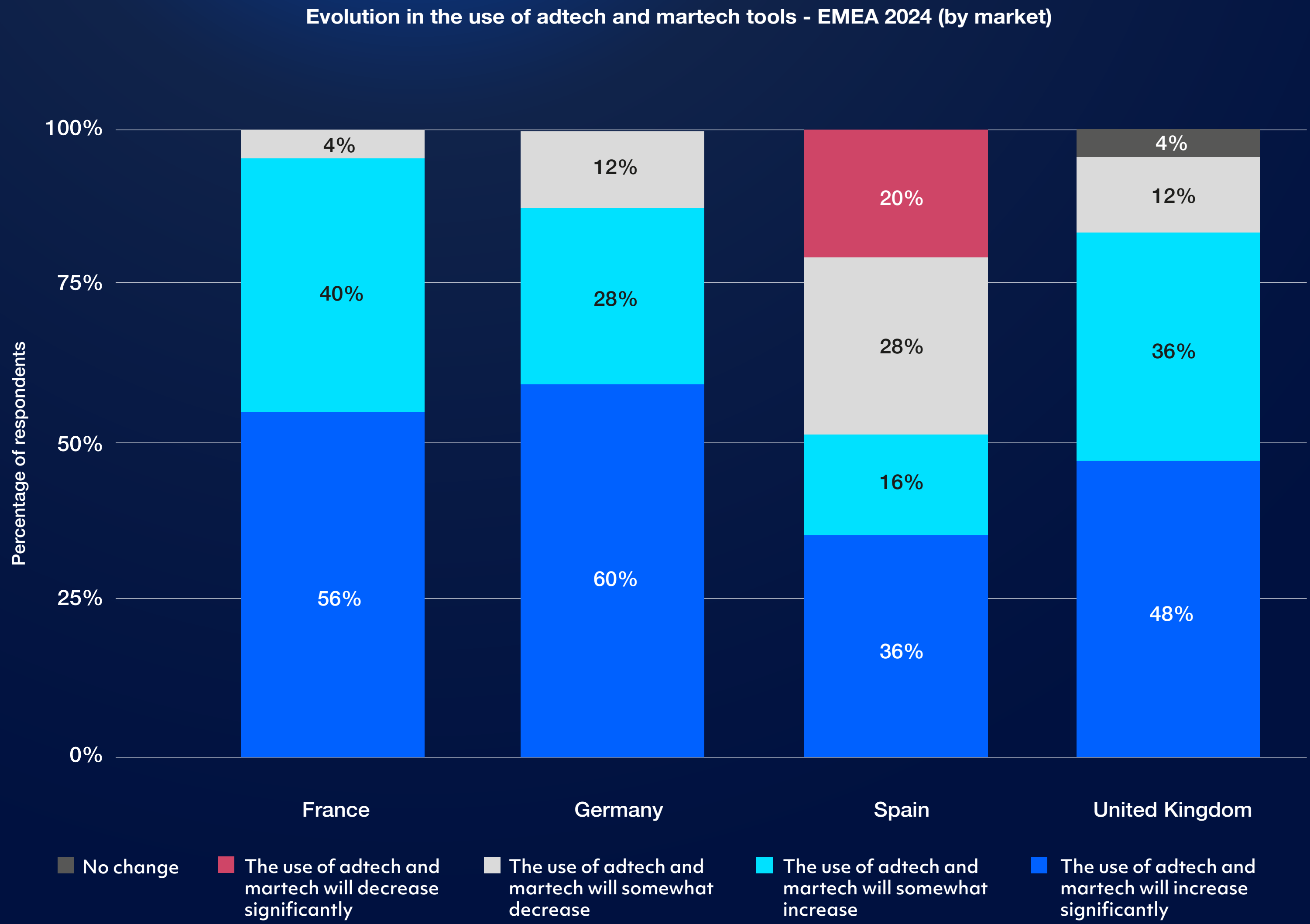
Moreover, uncertainty abounds within the marketing ecosystem following the reversal of plans to deprecate the third-party cookie outright within the Chrome browser. Liang writes,

> "While cookie deprecation has been postponed, it remains to be seen if future changes will result in greater addressability challenges in the future. To prepare for this uncertainty, platforms need to be proactive in adopting emerging, privacy-compliant and cookieless identity solutions while also leaning into tried-and-true tactics including contextual targeting."

Evolution in the use of adtech and martech tools - EMEA 2024

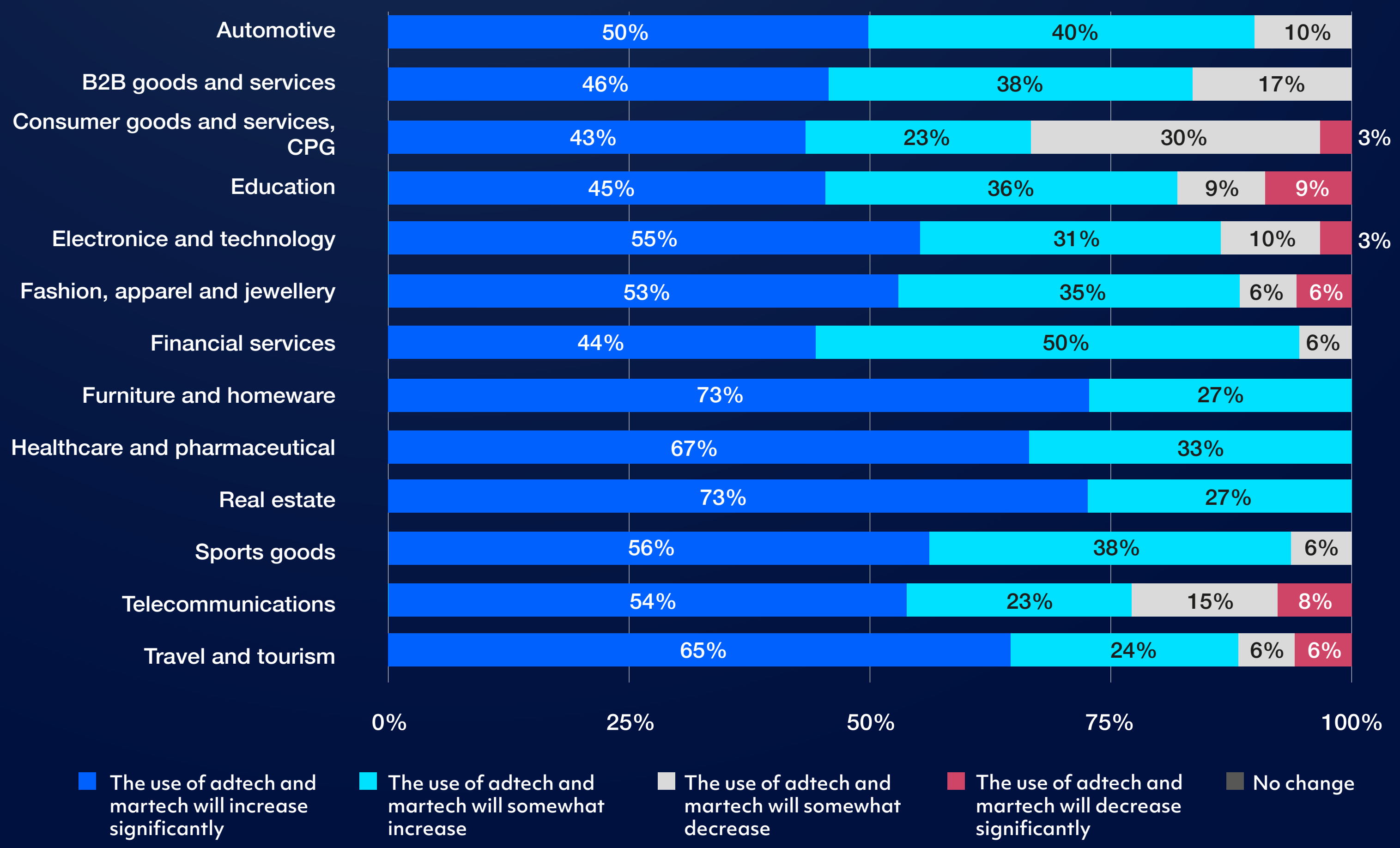


The use of adtech and martech solutions is set to increase most dramatically within France, where only 4% of respondents stated that the use of these tools would decrease over the course of the next 3-5 years. Contrastingly, 48% of those surveyed in Spain indicated that the use of these tools would decrease. This is likely a result of relatively poor campaign performance when these tools were utilised in the market (see impact of ad tech and/or martech integration on advertising campaigns).



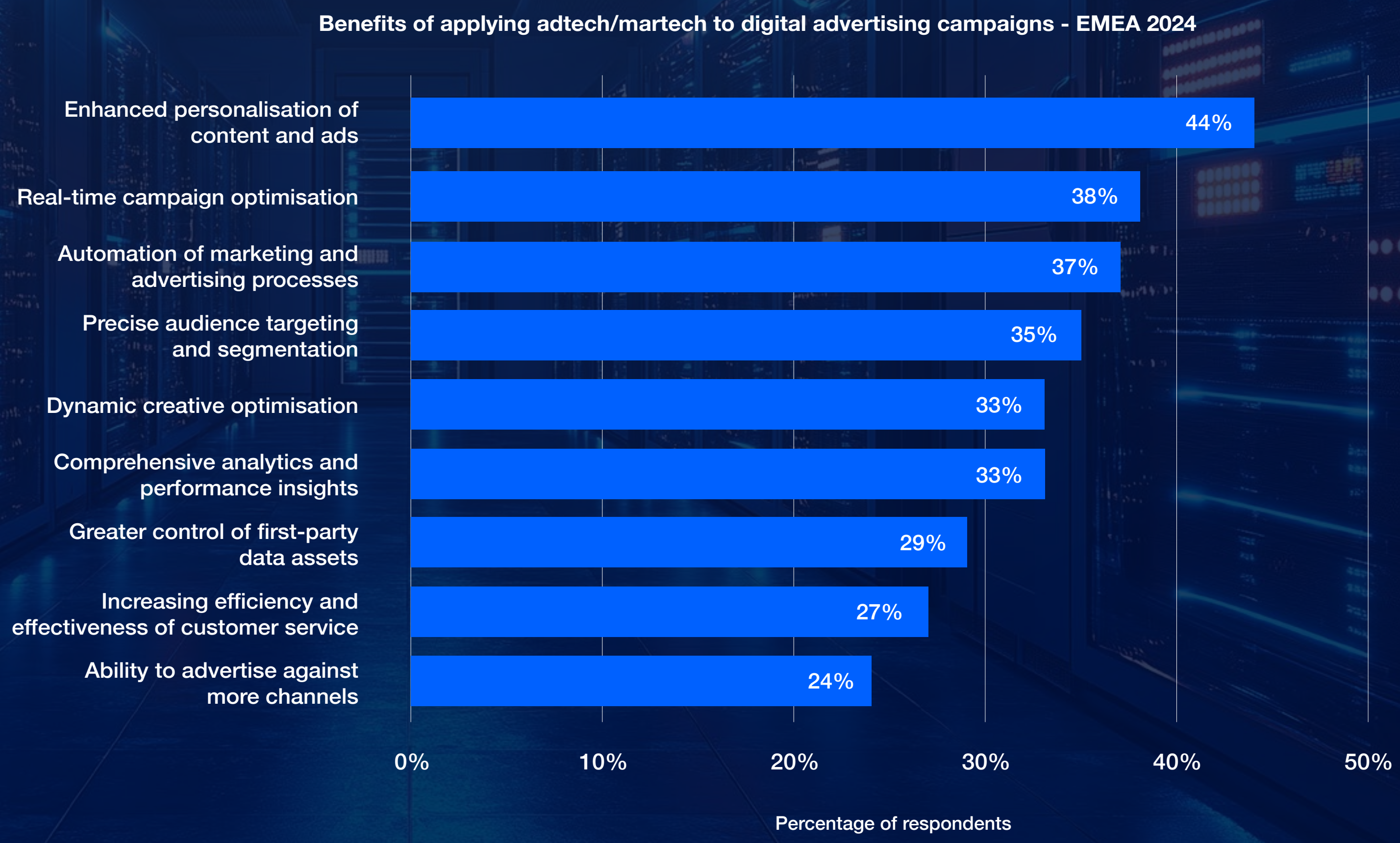
The use of adtech and martech solutions is set to proliferate most substantially within the furniture and homeware, real estate, and healthcare and pharmaceutical industries, with all respondents operating in these sectors reporting that the use of these tools will increase. By contrast, one third (33%) of marketers operating within the consumer goods and services (CPG) vertical reported that the use of adtech and/or martech tools would decrease in the next 3-5 years.

Evolution in the use of adtech and martech tools - EMEA 2024 (by vertical)

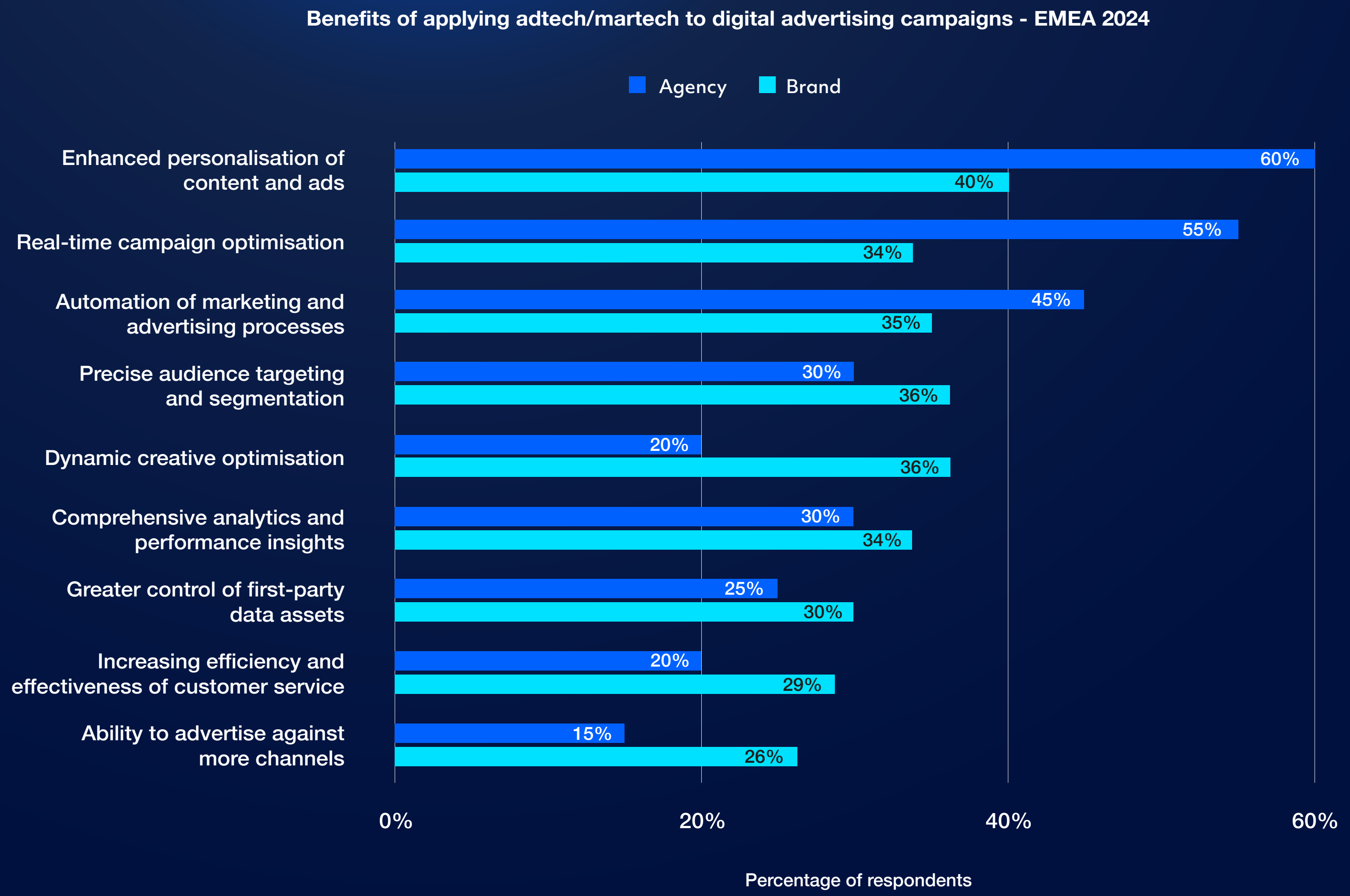


Benefits of applying adtech/martech to digital advertising campaigns

Enhanced personalisation of content and ads was identified as the leading benefit of applying adtech and/or martech solutions to digital advertising campaigns across Europe, with 44% of respondents identifying this as a key driver. This was closely followed by real-time campaign optimisation (38%), automation of marketing and advertising processes (37%) and precise audience targeting and segmentation (35%). All surveyed benefits were cited by a minimum of 24% of respondents.



EMEA brand respondents were more likely to identify dynamic creative optimisation (36% versus 20%) and precise audience segmentation (36% versus 30%) as a benefit of implementing adtech/martech solutions compared to their agency counterparts. By contrast, agency professionals were more likely to cite the enhanced personalisation of content and ads (60% versus 40%), real-time campaign optimisation (55% versus 34%), and the automation of marketing and advertising processes (45% versus 35%).



By market, 76% of respondents in the United Kingdom cited enhanced personalisation of content and ads as a benefit of adtech/martech tools. Contrastingly, only 4% of respondents here highlighted the ability to advertise against more channels as a benefit, whereas it was the joint leading benefit for those within the Spanish market.

Benefit	France	Germany	Spain	UK
Enhanced personalisation of content and ads	28%	36%	36%	76%
Real-time campaign optimisation	32%	36%	40%	44%
Automation of marketing and advertising processes	40%	40%	24%	44%
Precise audience targeting and segmentation	24%	32%	40%	44%
Dynamic creative optimisation	36%	44%	36%	16%
Comprehensive analytics and performance insights	40%	24%	28%	40%
Greater control of first-party data assets	36%	32%	32%	16%
Increasing efficiency and effectiveness of customer service	36%	32%	24%	16%
Ability to advertise against more channels	28%	24%	40%	4%

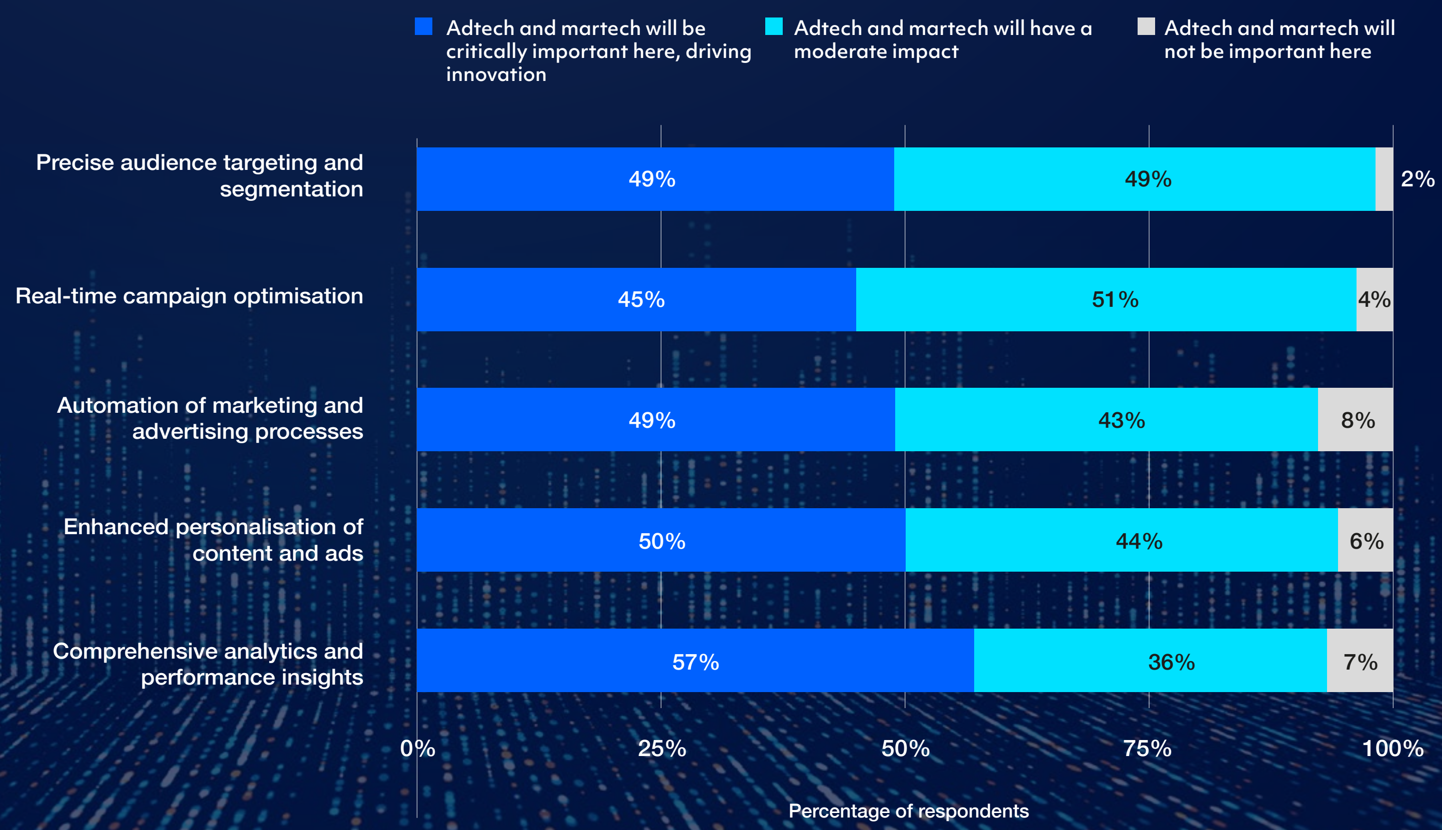
51% of professionals surveyed at large firms cited real-time campaign optimisation as a leading benefit of applying adtech and martech solutions, closely followed by enhanced personalisation of content and ads (49%). Scaling firms (50-200 employees) cited a wider variety of benefits, with dynamic creative optimisation the joint-second-most important benefit, identified by 40% of respondents. However, no respondent within small (<50 employees) companies identified this as a benefit, while nearly six-in-ten (57%) at these firms stated that the ability to advertise against more channels as a key benefit.

Benefit	Large (>200 employees)	Scaling (50-200 employees)	Small (<50 employees)
Enhanced personalisation of content and ads	49%	40%	43%
Real-time campaign optimisation	51%	29%	29%
Automation of marketing and advertising processes	32%	40%	43%
Precise audience targeting and segmentation	27%	42%	29%
Dynamic creative optimisation	29%	40%	0%
Comprehensive analytics and performance insights	34%	33%	29%
Greater control of first-party data assets	34%	23%	43%
Increasing efficiency and effectiveness of customer service	22%	31%	29%
Ability to advertise against more channels	22%	21%	57%

Importance of adtech and martech in digital advertising factors

Marketers across EMEA believe that adtech and martech will be crucial for a wide range of digital advertising factors, with over 90% of respondents believing these solutions would have an impact in all surveyed factors. Nearly all (98%) of respondents believe adtech and martech will have at least a moderate impact on precise audience targeting and segmentation, while well over half (57%) of those surveyed believe adtech and martech would be critically important in analytics and performance insights.

Importance of adtech and martech in digital advertising factors - EMEA 2024



Agencies are generally more enthusiastic about the use of adtech and martech in real-time campaign optimisation than their brand counterparts, with 65% stating that the use of these tools is set to be critically important versus 40%. Similarly, brands are looking more towards the use of adtech/martech in analytics and insights, with 61% stating these tools would be critically important versus 40%.

Factor	Will be critically important		Will not be important	
	Agency	Brand	Agency	Brand
Precise audience targeting and segmentation	55%	48%		3%
Real-time campaign optimisation	65%	40%		5%
Automation of marketing and advertising processes	45%	50%	10%	8%
Enhanced personalisation of content and ads	60%	48%	5%	6%
Comprehensive analytics and performance insights	40%	61%		9%

By market, respondents in France generally believe that the use of adtech and martech tools will be critically important in both analytics and performance insights (72%) and audience targeting and segmentation (68%). Similarly in Spain, respondents believe that both enhanced personalisation (69%) and real-time campaign optimisation (60%) will see the strongest impact from the use of adtech/martech solutions.

Factor	Will be critically important				Will not be important			
	France	Germany	Spain	UK	France	Germany	Spain	UK
Precise audience targeting and segmentation	68%	36%	40%	52%			8%	
Real-time campaign optimisation	36%	32%	60%	52%		8%	4%	4%
Automation of marketing and advertising processes	40%	52%	48%	56%		4%	16%	12%
Enhanced personalisation of content and ads	40%	56%	68%	36%	8%	4%	4%	8%
Comprehensive analytics and performance insights	72%	56%	48%	52%	4%	12%	4%	8%

61% brand and agency marketers at large (>200 employees) companies stated that the use of adtech and martech would be critically important in comprehensive analytics and performance insights. Likewise 58% of those at scaling (50-200 employees) firms believe that adtech and martech tools will be critical for the enhanced personalisation of content and ads. Finally, nearly 90% of respondents at small (<50 employees) companies stated that adtech and martech will be critical across the automation of content and ads, while all those surveyed at these firms believe that adtech/martech would have some level of impact across all surveyed factors.

Factor	Will be critically important			Will not be important		
	Large (>200 employees)	Scaling (50-200 employees)	Small (<50 employees)	Large (>200 employees)	Scaling (50-200 employees)	Small (<50 employees)
Precise audience targeting and segmentation	49%	46%	71%		4%	
Real-time campaign optimisation	54%	38%	43%		8%	
Automation of marketing and advertising processes	49%	44%	86%	2%	13%	
Enhanced personalisation of content and ads	44%	58%	29%	2%	10%	
Comprehensive analytics and performance insights	61%	54%	57%	5%	10%	

Factor	Automotive	B2B goods and services	Consumer goods and services, CPG	Education	Electronics and technology	Fashion, apparel, and jewellery	Financial services	Furniture and homeware	Health and pharma	Real estate	Sports goods	Telecoms	Travel and tourism
Precise audience targeting and segmentation	50%	38%	43%	45%	52%	35%	61%	45%	100%	64%	50%	58%	53%
Real-time campaign optimisation	70%	46%	37%	55%	59%	35%	39%	36%	33%	64%	44%	46%	47%
Automation of marketing and advertising processes	50%	54%	53%	64%	52%	53%	56%	55%	50%	55%	56%	31%	65%
Enhanced personalisation of content and ads	50%	50%	47%	55%	52%	59%	44%	55%	50%	73%	63%	38%	41%
Comprehensive analytics and performance insights	60%	58%	63%	64%	59%	71%	83%	64%	67%	73%	63%	38%	65%

Challenges in integrating adtech and martech

The cost of implementing solutions was the leading challenge to integrating adtech and martech solutions according to European brand and agency marketers by a significant margin, with 62% identifying this as a barrier. This was followed by data privacy and compliance issues (37%); ROI measurement challenges; and internal pushback against solution implementation (both 31%).

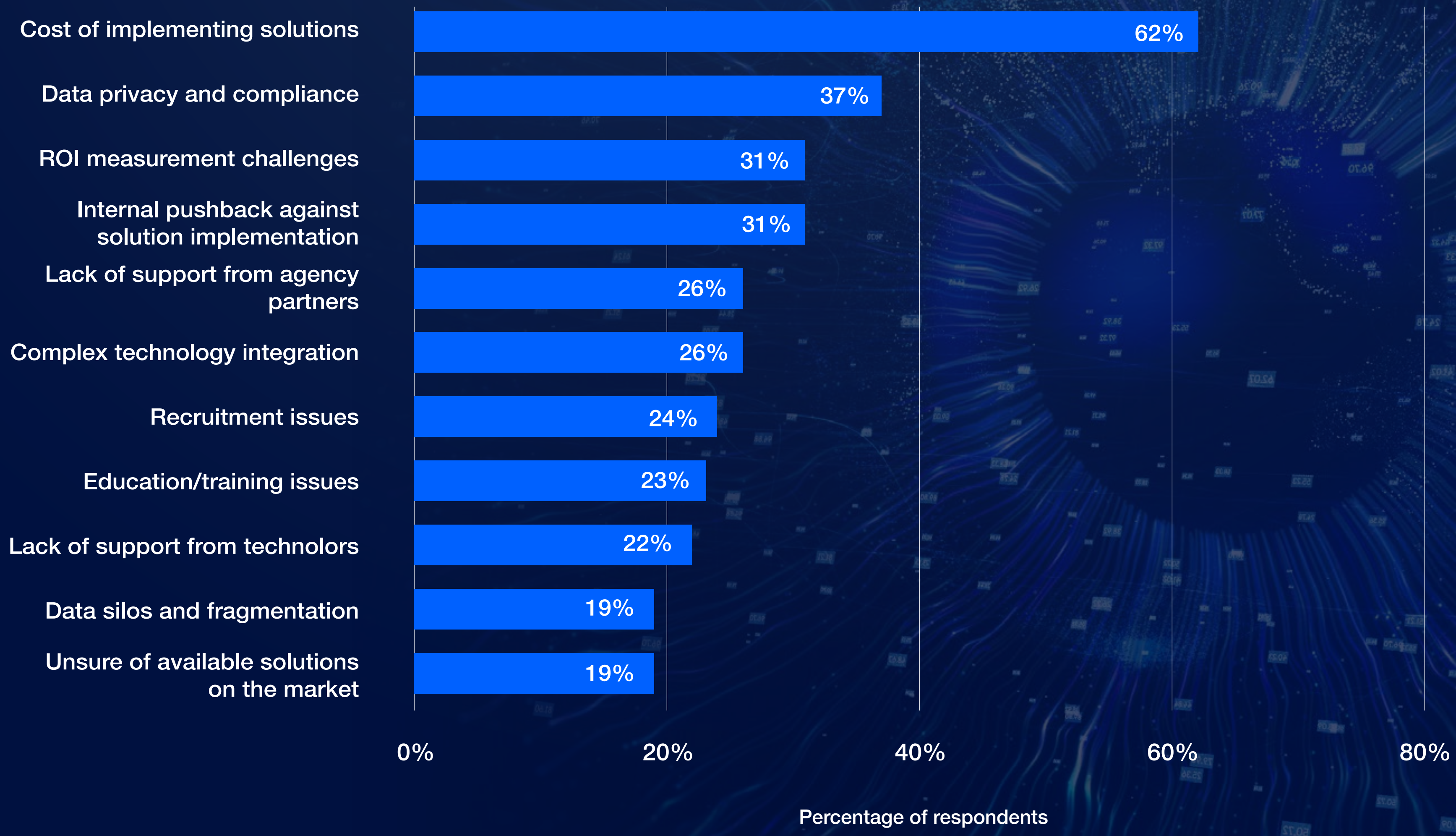
Seeking efficiencies via deeper integrations has been cited as one key route marketers can take in order to lower the cost of implementing novel adtech and martech solutions. Liang writes, “As platforms continue to expand turnkey integrations and strengthen the connective tissue across partners, marketers will benefit from reduced setup complexity and less need to manage multiple platforms simultaneously.

“Maximising the applications of first-party data can also help marketers reduce data activation costs while also ensuring that strong performance remains uncompromised.”

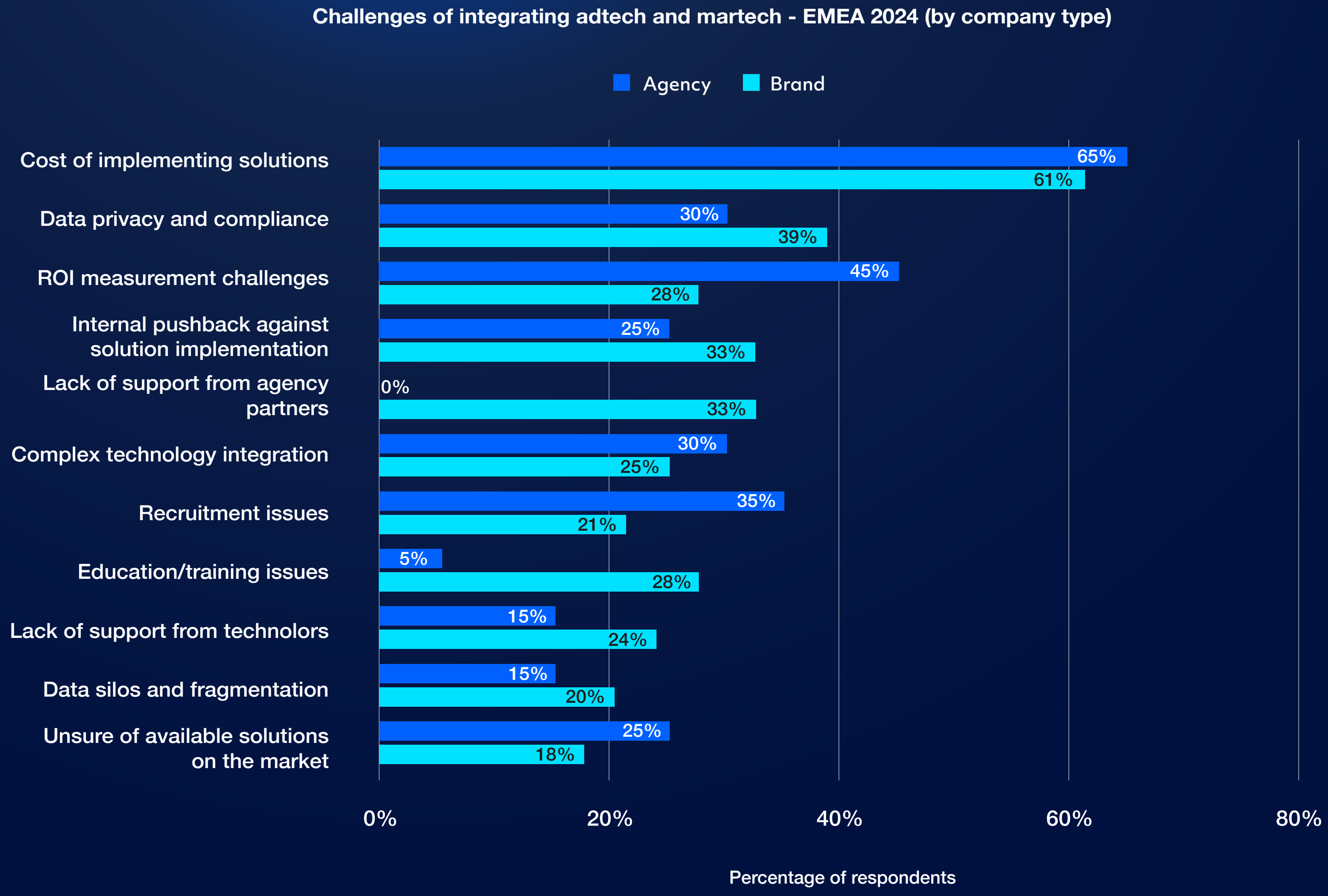
“As platforms continue to expand turnkey integrations and strengthen the connective tissue across partners, marketers will benefit from reduced setup complexity and less need to manage multiple platforms simultaneously.”

- Kevin Liang, Senior Director, Solutions, StackAdapt

Challenges of integrating adtech and martech - EMEA 2024



Agency respondents were more likely than their brand counterparts to cite ROI measurement challenges (45% versus 28%) and recruitment issues (35% versus 21%) as challenges to implementing adtech and martech solutions. On the other hand, brand professionals identified data privacy and compliance (39% versus 30%) and education/ training issues (28% versus 5%) as more pressing concerns than those within agencies. Concerningly, 33% of brands stated that they do not receive an adequate level of support from their agency partners.



By market, marketers within France reported a lack of support from agency partners was a greater challenge inhibiting the use of adtech and martech solutions comparatively to other markets, while those in Spain identified recruitment issues as a leading concern (44%), despite these being the least pressing issue within the French market (8%). Similarly, nearly 32% of respondents in France were unsure of available adtech/martech solutions, while only 4% of those surveyed in the United Kingdom shared this uncertainty.

Challenge	France	Germany	Spain	UK
Cost of implementing solutions	56%	68%	68%	56%
Data privacy and compliance	32%	36%	28%	52%
ROI measurement challenges	24%	36%	28%	36%
Internal pushback against solution implementation	36%	44%	28%	16%
Lack of support from agency partners	48%	24%	20%	12%
Complex technology integration	32%	16%	28%	28%
Recruitment issues	8%	24%	44%	20%
Education/training issues	16%	20%	32%	24%
Lack of support from technology partners	36%	24%	8%	20%
Data silos and fragmentation	20%	12%	20%	24%
Unsure of available solutions on the market	32%	28%	12%	4%

By vertical, the only sector in which brands and agencies reported a concern other than cost of implementing solutions as a leading barrier was the healthcare and pharmaceutical sectors, where respondents instead cited data privacy and compliance; recruitment issues; and uncertainty regarding available solutions on the market (all 50%) as leading concerns.

Challenge	Automotive	B2B goods and services	Consumer goods and services, CPG	Education	Electronics and technology	Fashion, apparel, and jewellery	Financial services	Furniture and homeware	Health and pharma	Real estate	Sports goods	Telecoms	Travel and tourism
Cost of implementing solutions	80%	54%	63%	73%	69%	65%	56%	73%	33%	82%	69%	81%	71%
Data privacy and compliance	30%	46%	33%	27%	28%	47%	56%	55%	50%	45%	38%	27%	41%
ROI measurement challenges	40%	17%	37%	45%	24%	35%	17%	55%	33%	36%	6%	38%	18%
Internal pushback against solution implementation	20%	29%	33%	36%	38%	47%	28%	36%	33%	27%	25%	23%	18%
Lack of support from agency partners	30%	21%	30%	45%	24%	24%	28%	18%	17%	36%	19%	31%	35%
Complex technology integration	30%	17%	30%	36%	31%	12%	22%	36%	33%	9%	31%	31%	47%
Recruitment issues	30%	25%	10%	18%	28%	6%	39%	0%	50%	36%	38%	31%	29%
Education/training issues	50%	25%	30%	27%	21%	18%	28%	9%	17%	18%	31%	15%	24%
Lack of support from technology partners	50%	33%	27%	27%	31%	24%	33%	18%	17%	0%	19%	12%	24%
Data silos and fragmentation	0%	25%	17%	18%	10%	18%	17%	36%	17%	27%	19%	19%	29%
Unsure of available solutions on the market	20%	25%	13%	27%	21%	0%	17%	0%	50%	36%	19%	15%	18%

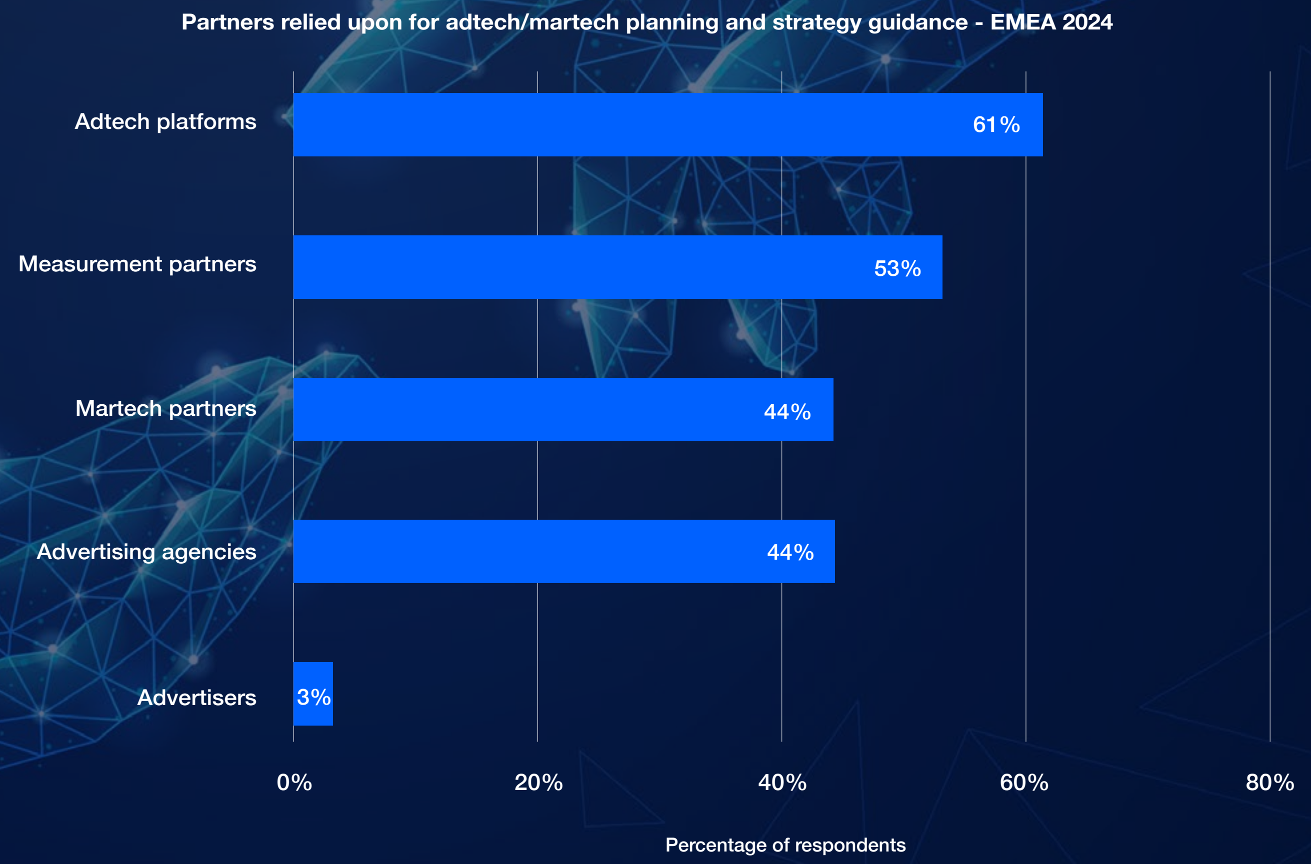
Though respondents based within large (>200 employees) or scaling (50-200 employees) companies reported that they face broadly similar challenges preventing the integration of adtech and martech tools, those at small firms reported a different range of issues. Over 70% of respondents at firms with less than 50 employees reported that complexities around technology implementation was a leading challenge, while nearly 60% reported a lack of support from their technology partner as an issue.

Challenge	Large (>200 employees)	Scaling (50-200 employees)	Small (<50 employees)
Cost of implementing solutions	61%	65%	43%
Data privacy and compliance	39%	37%	29%
ROI measurement challenges	27%	33%	43%
Internal pushback against solution implementation	29%	35%	14%
Lack of support from agency partners	29%	27%	0%
Complex technology integration	24%	21%	71%
Recruitment issues	29%	19%	29%
Education/training issues	20%	27%	14%
Lack of support from technology partners	17%	21%	57%
Data silos and fragmentation	22%	17%	14%
Unsure of available solutions on the market	17%	19%	29%

Partners relied upon for adtech/martech planning and strategy guidance

EMEA-based marketers are significantly more likely to turn to their adtech partners (61%) than their martech partners (44%) for adtech/martech planning and strategy guidance. Andrew Rose, VP of sales, EMEA, StackAdapt, details how this reliance stems from adtech partner expertise in managing the complex legislative environment within the region, writing,

"EMEA marketers rely on adtech partners for strategic guidance due to the direct impact of data privacy regulations on campaign targeting and measurement. While martech partners manage compliance on owned data, adtech providers specialise in navigating real-time regulatory constraints that shape audience engagement, making them essential for media strategy."



Insights&Attitudes From ExchangeWire

Marketing professionals across both France and Germany typically rely on a wide range of partners for planning and strategy guidance when deploying adtech and martech solutions. By contrast, those in Spain and the United Kingdom are more likely to rely solely on adtech platforms and/or measurement partners.

Partner	France	Germany	Spain	UK
Adtech platforms	60%	60%	64%	60%
Measurement partners	60%	64%	40%	48%
Martech partners	60%	56%	32%	32%
Advertising agencies	60%	48%	20%	24%
Advertisers	0%	4%	4%	4%

Partner	Automotive	B2B goods and services	Consumer goods and services, CPG	Education	Electronics and technology	Fashion, apparel, and jewellery	Financial services	Furniture and homeware	Health and pharma	Real estate	Sports goods	Telecoms	Travel and tourism
Adtech platforms	70%	75%	63%	36%	48%	53%	50%	55%	33%	36%	50%	77%	35%
Measurement partners	40%	50%	43%	55%	76%	65%	61%	64%	67%	82%	63%	54%	59%
Martech partners	50%	29%	47%	55%	62%	41%	44%	45%	33%	36%	44%	42%	65%
Advertising agencies	60%	42%	43%	55%	48%	35%	61%	36%	33%	45%	38%	27%	59%
Advertisers	0%	4%	0%	9%	7%	0%	6%	0%	0%	18%	6%	0%	6%

In contrast to their counterparts in large (>200 employees) and scaling (50-200 employees) companies, marketing professionals within small firms weigh equal importance to their adtech and martech partners when it comes to planning and strategy guidance for implementing adtech/martech tools.

Partner	Large (>200 employees)	Scaling (50-200 employees)	Small (<50 employees)
Adtech platforms	61%	60%	71%
Measurement partners	56%	52%	43%
Martech partners	44%	42%	71%
Advertising agencies	32%	42%	43%
Advertisers	5%	2%	0%

About StackAdapt

StackAdapt is a multi-channel digital advertising platform that is leading the industry with machine learning and AI at its core. Ad buyers plan, execute, and manage data-driven digital advertising campaigns across all devices, inventory, and publisher partners. Specialising in native, display, video, connected TV, audio, in-game, and digital out-of-home advertising, StackAdapt is the #1 DSP and a Top 100 Software Product on G2, supporting marketers and advertisers globally.

For more information, please visit www.stackadapt.com

About ExchangeWire

ExchangeWire provides news and analysis on the business of media, marketing and commerce with a specific focus on data and technology. We offer actionable market intelligence on the trends and innovations that are shaping the media, marketing and commerce industries. 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.

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