Insights&Attitudes
From ExchangeWire

In association with DIGITAL AUDIENCE

Data Distribution 2025

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Contents

Insights&Attitudes

Key findings

- Media professionals across Europe are adopting a highly open and experimental approach to collaborating with external partners and platforms on their user data — only 5% of those surveyed are not currently working with third-parties on their user data.
- Use of data clean rooms varies substantially across the surveyed markets and position within the advertising supply chain — while they are used heavily within the Netherlands and the UK, they are less popular within Germany and Sweden.
- Across Europe, real-time identity resolution was identified as the leading capability that would most improve audience/campaign targeting using first-party data. This was closely followed by improved cross-platform match rates and better audience enrichment.
- Publishers across Europe are experimenting heavily with how they monetise their audience data. Data licensing is the preferred method, employed by 42% of publishers, though direct-sold campaigns, programmatic (OpenRTB), and programmatic (PMPs) are each used by one-third of publishers.
- Nine-in-ten surveyed marketers reported that they are activating their customer data across multiple platforms (eg Meta, Google, independent demand-side platforms) on a regular or occasional basis.
- Nearly two-thirds of marketers prefer to use internal tools or platforms to onboard data assets, while 29% state that they work with a third-party onboarding provider.

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Collaboration with external partners/platforms on user data

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Media professionals across Europe are adopting a highly open and experimental approach to collaborating with external partners and platforms on their user data.

Remarkably, only 5% of those surveyed are not currently working with third-parties on their user data, while over half (55%) of respondents are using multiple methods to collaborate with partners on user data. Direct SFTP/API (secure file transfer protocol / application programming interface) integrations are generally the preferred method of collaboration (60% of respondents), closely followed by managed services from vendors (58%).

55%

of respondents are using multiple methods to collaborate with partners on user data

Figure 1: Collaboration with external partners/platforms on user data — Europe 2025

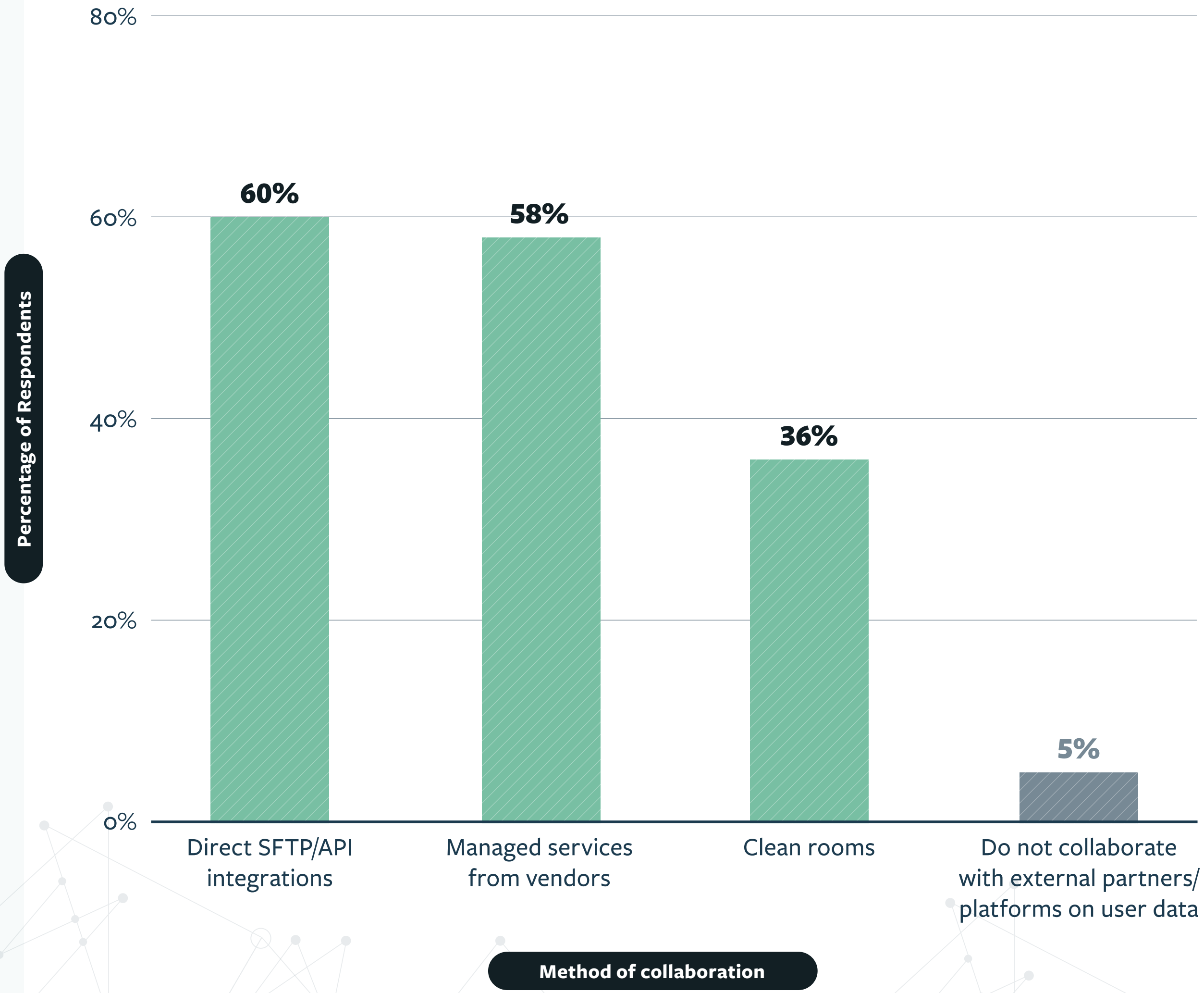
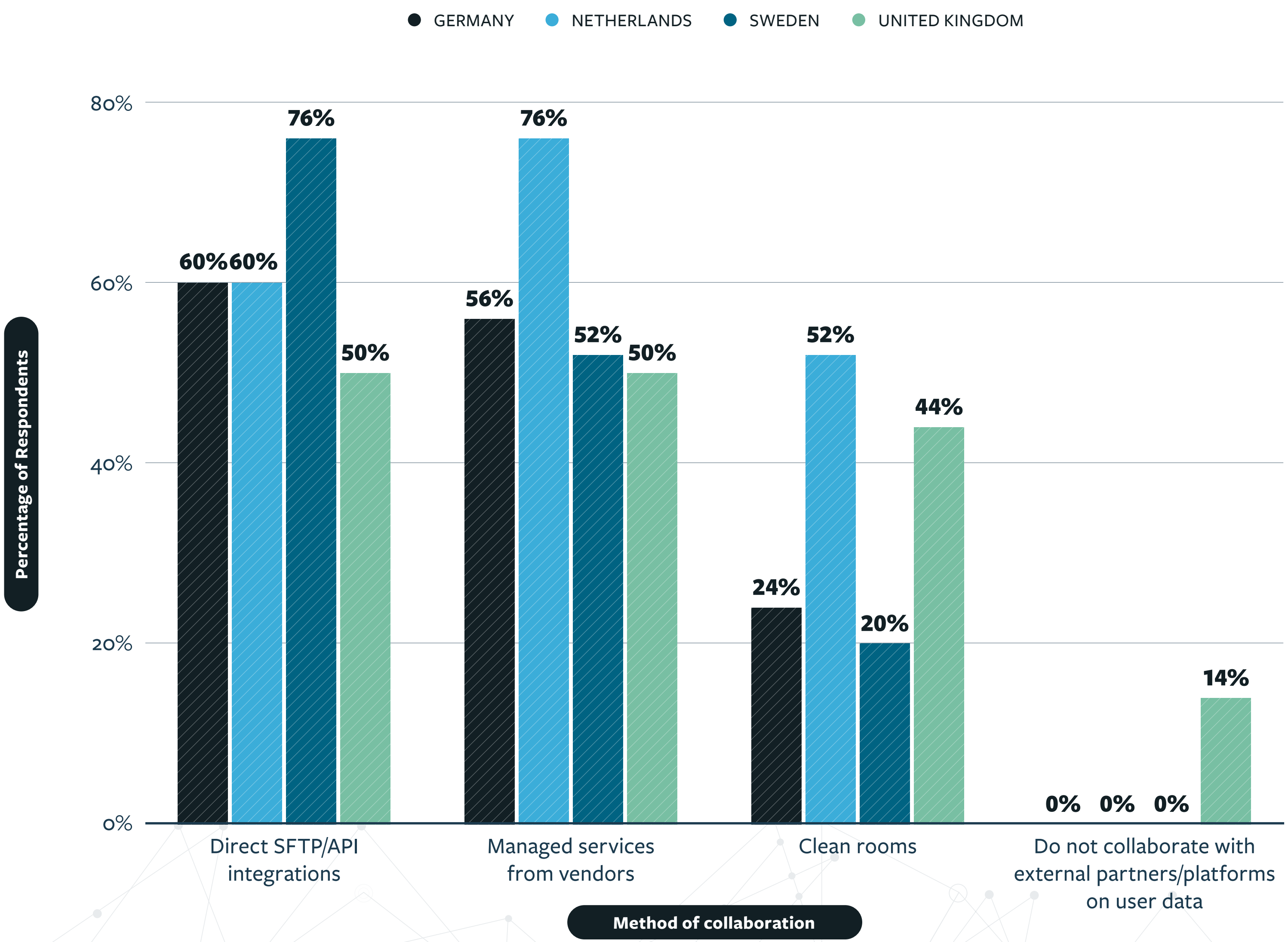


Figure 2: Collaboration with external partners/platforms on user data — Europe 2025 (by market)



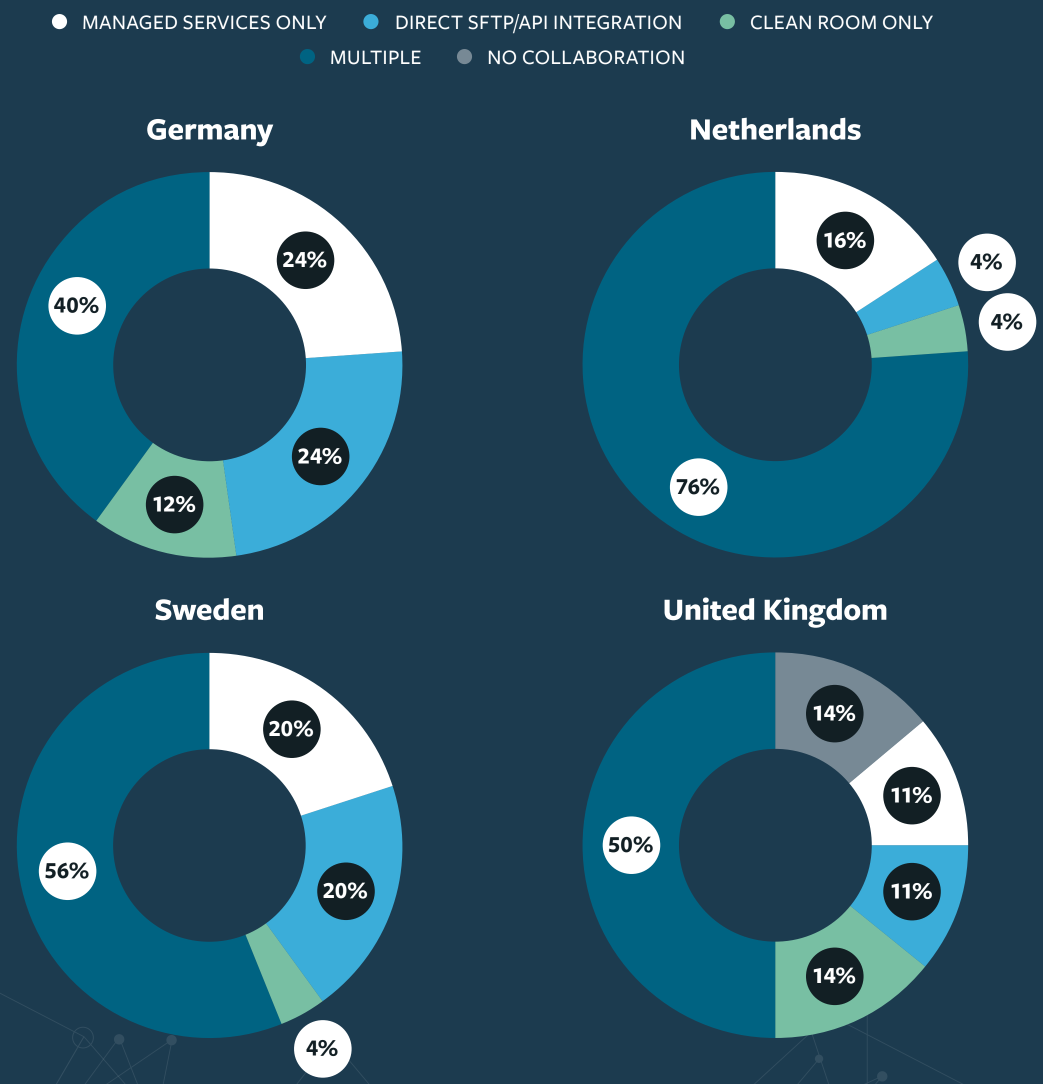
Use of data clean rooms varies substantially across the surveyed markets — while they are used heavily within the Netherlands (52%) and the UK (44%), they are less popular within Germany (24%) and Sweden (20%). In the latter two countries, direct SFTP/API integrations are instead more commonly employed within Sweden, while respondents in Germany lean towards managed services from third-party vendors (both 76%). Finally, all respondents in Germany, Netherlands, and Sweden are currently working with external partners/platforms on user data.

While over three-quarters (76%) of respondents within the Netherlands use multiple ways of collaborating with third-parties regarding their user data, only four-in-ten media professionals use multiple methods within Germany.

76%

of respondents within the Netherlands use multiple ways of collaborating with third-parties regarding their user data

Figure 3: Method of collaboration on user data — Europe 2025 (by market)



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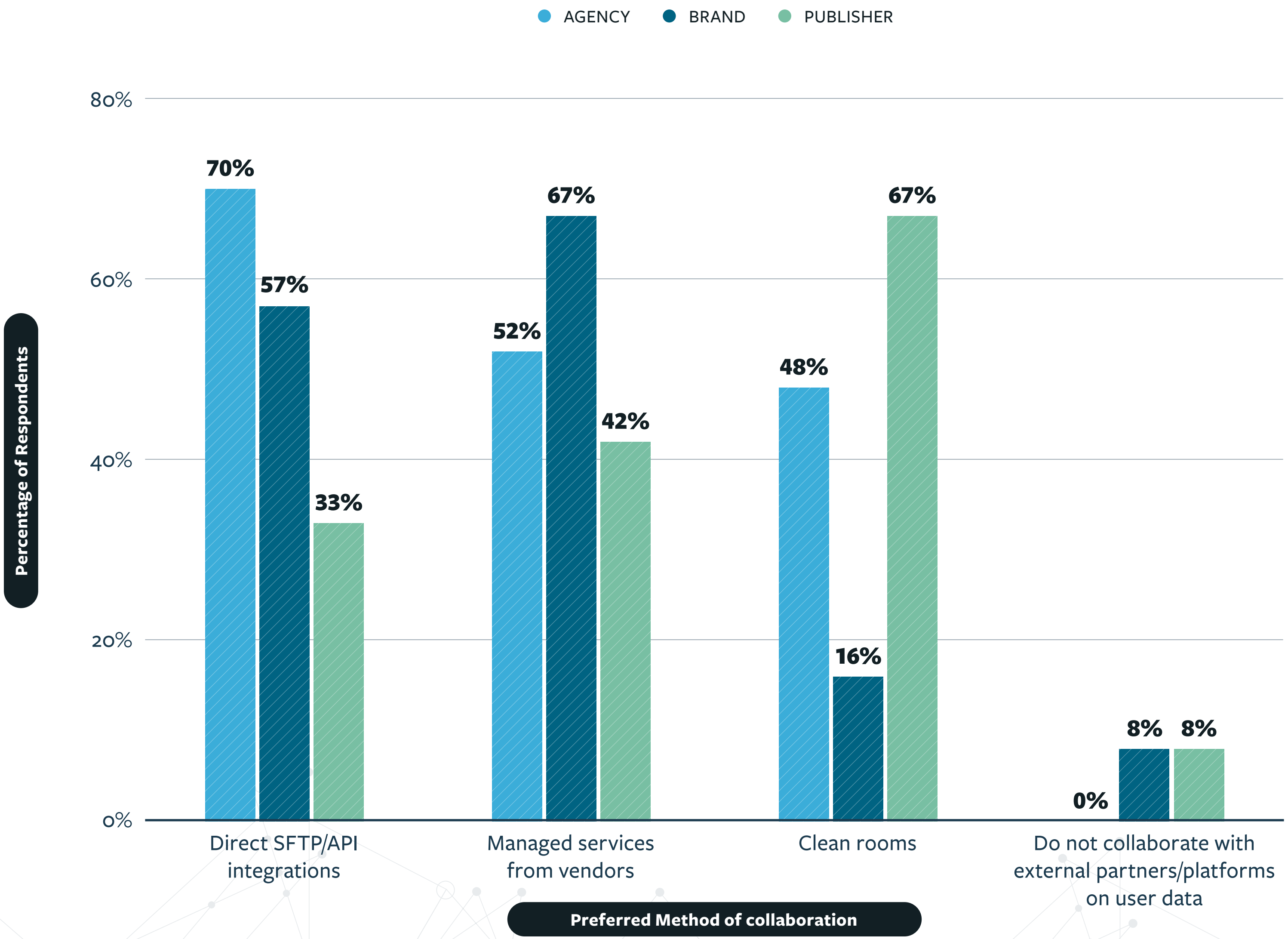
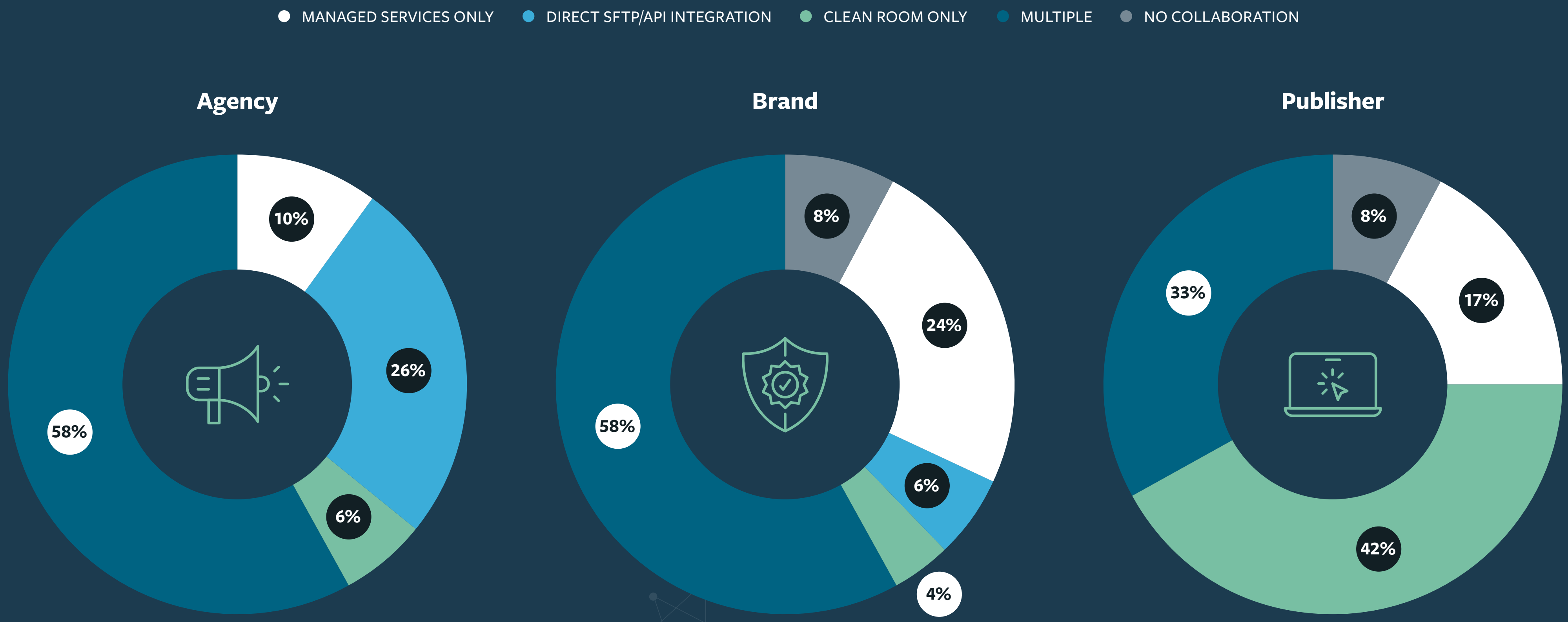
Preferred methods of collaboration with external partners also varies substantially according to where media professionals sit within the programmatic supply chain. Direct integrations are preferred by the overriding majority (70%) of agencies, however these are only used by one-third (33%) of surveyed marketers. Surveyed brand respondents prefer to use managed service providers (67%), while are much less likely to use data clean rooms (16%), despite the finding that these are utilised by over two-thirds (67%) of surveyed publishers.

Figure 4: Collaboration with external partners/platforms on user data — Europe 2025 (by company type)



Moreover, publishers are using clean rooms exclusively (42%) over employing multiple collaboration methods (33%), against the predominant trend observed for the buy-side.

Figure 5: Method of collaboration on user data — Europe 2025 (by company type)



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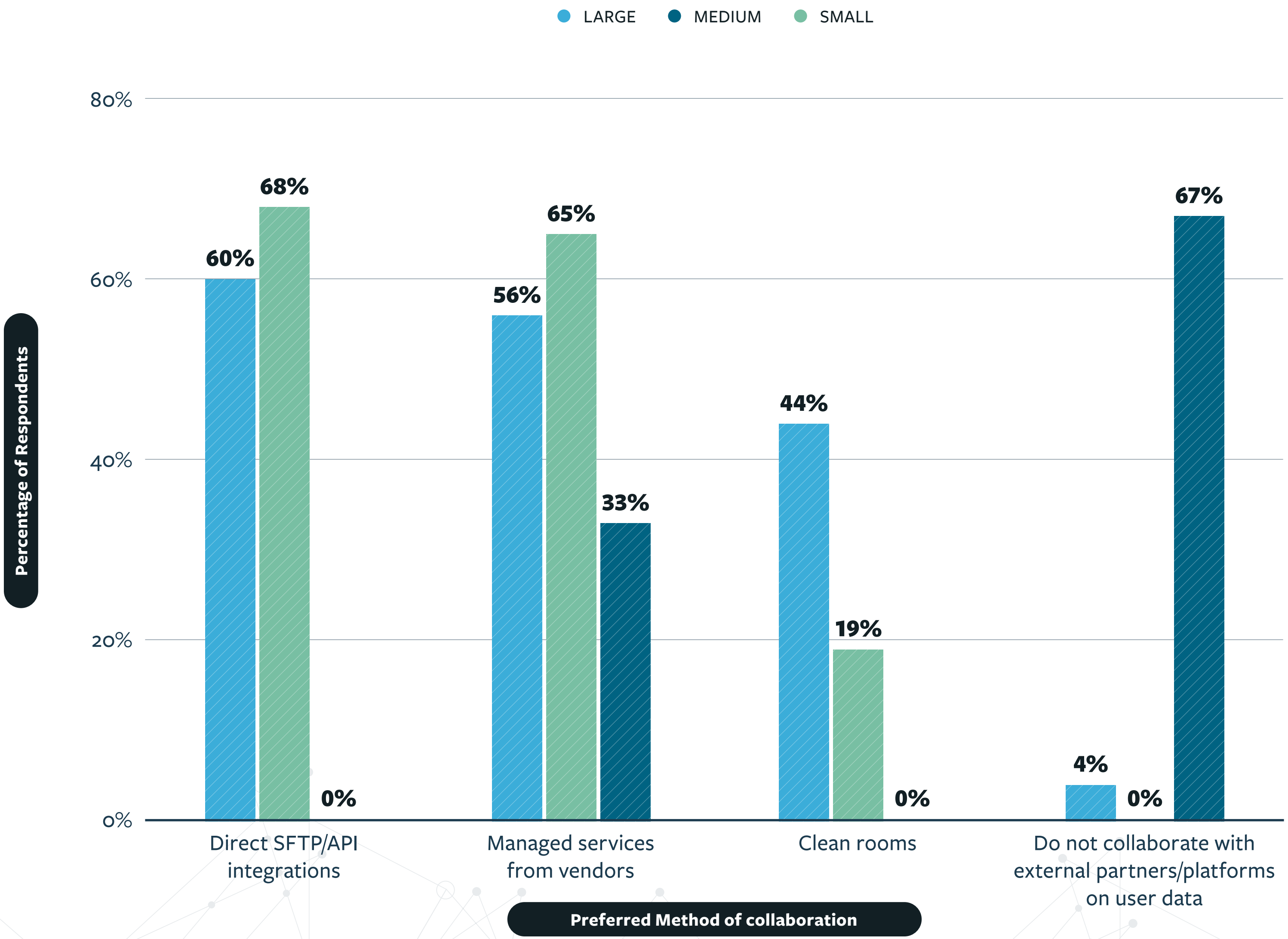
Concerningly, the majority of media professionals within small companies (<50 employees) are not currently collaborating with third-parties on their user data. Moreover, surveyed respondents at these small firms are not currently utilising both direct SFTP/API integrations nor clean rooms. Additionally, while exhibiting a relatively similar preference for direct integrations and managed services, clean rooms are being utilised more predominantly (44% versus 19%) among large companies (>200 employees) compared to medium-sized companies (50–200 employees).

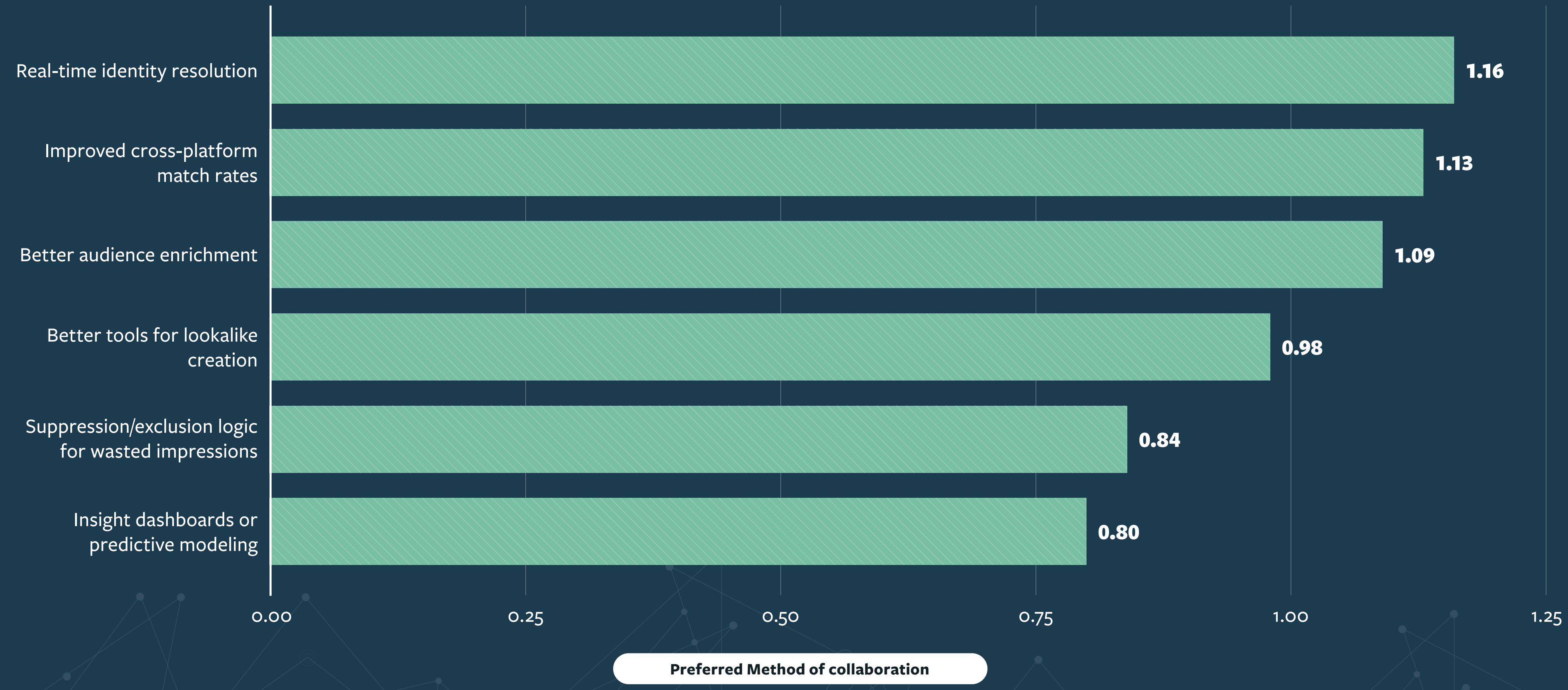
Figure 6: Collaboration with external partners/platforms on user data — Europe 2025 (by company size)



Capabilities to improve audience/campaign targeting using first-party data

Across Europe, real-time identity resolution was identified as the leading capability that would most improve audience/campaign targeting using first-party data, with a ranking score of 1.16 out of a maximum of three. This was closely followed by improved cross-platform match rates (1.13) and better audience enrichment (1.09).

Figure 7: Capabilities to improve audience/campaign targeting using first-party data — Europe 2025



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1.72

improved cross-platform match rates was highlighted as the most-needed capability in Germany

However, identified capabilities to improve targeting based upon first-party data varied considerably according to the individual market. Firstly, real-time identity resolution was less important within Germany (0.88) and the Netherlands (0.8) when compared to Sweden (1.64) and the UK (1.28). Instead, improved cross-platform match rates was highlighted as the most-needed capability in Germany (1.72), while respondents in the Netherlands identified insight dashboards or predictive modelling (1.28) as more pressing requirements.

Figure 8: Capabilities to improve audience/campaign targeting using first-party data — Europe 2025 (by market)

Capability	Germany	Netherlands	Sweden	UK
Real-time identity resolution	0.88	0.80	1.64	1.28
Improved cross-platform match rates	1.72	0.80	1.12	0.94
Better audience enrichment	0.92	0.88	1.32	1.19
Better tools for lookalike creation	1.08	1.20	0.48	1.11
Suppression/exclusion logic for wasted impressions	0.96	1.04	0.76	0.67
Insight dashboards or predictive modelling	0.44	1.28	0.68	0.81

1.43

respondents based within brands placed a much higher importance on real-time identity resolution compared to their agency counterparts

While those on the buy-side were broadly aligned, respondents based within brands placed a much higher importance on real-time identity resolution compared to their agency counterparts (1.43 versus 0.86), whilst surveyed marketers within agencies gave a greater weight to improved suppression/exclusion logic for wasted impressions (1.04 versus 0.63). On the sell-side, surveyed publishers identified real-time identity resolution (1.33), better audience enrichment (1.25) and insight dashboards/predictive modelling (1.25) as the capabilities likely to improve targeting based upon first-party data, while perhaps unsurprisingly giving significantly less weight to cross-platform match rates (0.58).

Figure 9: Capabilities to improve audience/campaign targeting using first-party data — Europe 2025 (by company type)

Capability	Agency	Brand	Publisher
Real-time identity resolution	0.86	1.43	1.33
Improved cross-platform match rates	1.28	1.10	0.58
Better audience enrichment	1.02	1.12	1.25
Better tools for lookalike creation	1.06	0.96	0.75
Suppression/exclusion logic for wasted impressions	1.04	0.63	0.83
Insight dashboards or predictive modelling	0.74	0.76	1.25

2.33

Media professionals in small (<50 employees) companies cited better audience enrichment as the most important capability

Respondents within scaled enterprises (>200 employees) identified real-time identity resolution (1.39) as the capability most likely to improve audience/campaign targeting based upon first-party data, whilst those in medium-sized (50-200 employees) cited improved cross-platform match rates (1.58). Media professionals in small (<50 employees) companies cited better audience enrichment (2.33) as the most important capability, while no respondent within a firm of this size identified improved cross-platform match rates as one of the three most important capabilities.

Figure 10: Capabilities to improve audience/campaign targeting using first-party data — Europe 2025 (by company size)

Capability	Large	Medium	Small
Real-time identity resolution	1.39	0.58	1.33
Improved cross-platform match rates	0.99	1.58	0.00
Better audience enrichment	1.05	1.06	2.33
Better tools for lookalike creation	0.99	0.94	1.33
Suppression/exclusion logic for wasted impressions	0.82	0.90	0.67
Insight dashboards or predictive modelling	0.77	0.94	0.33

Monetisation of audience data

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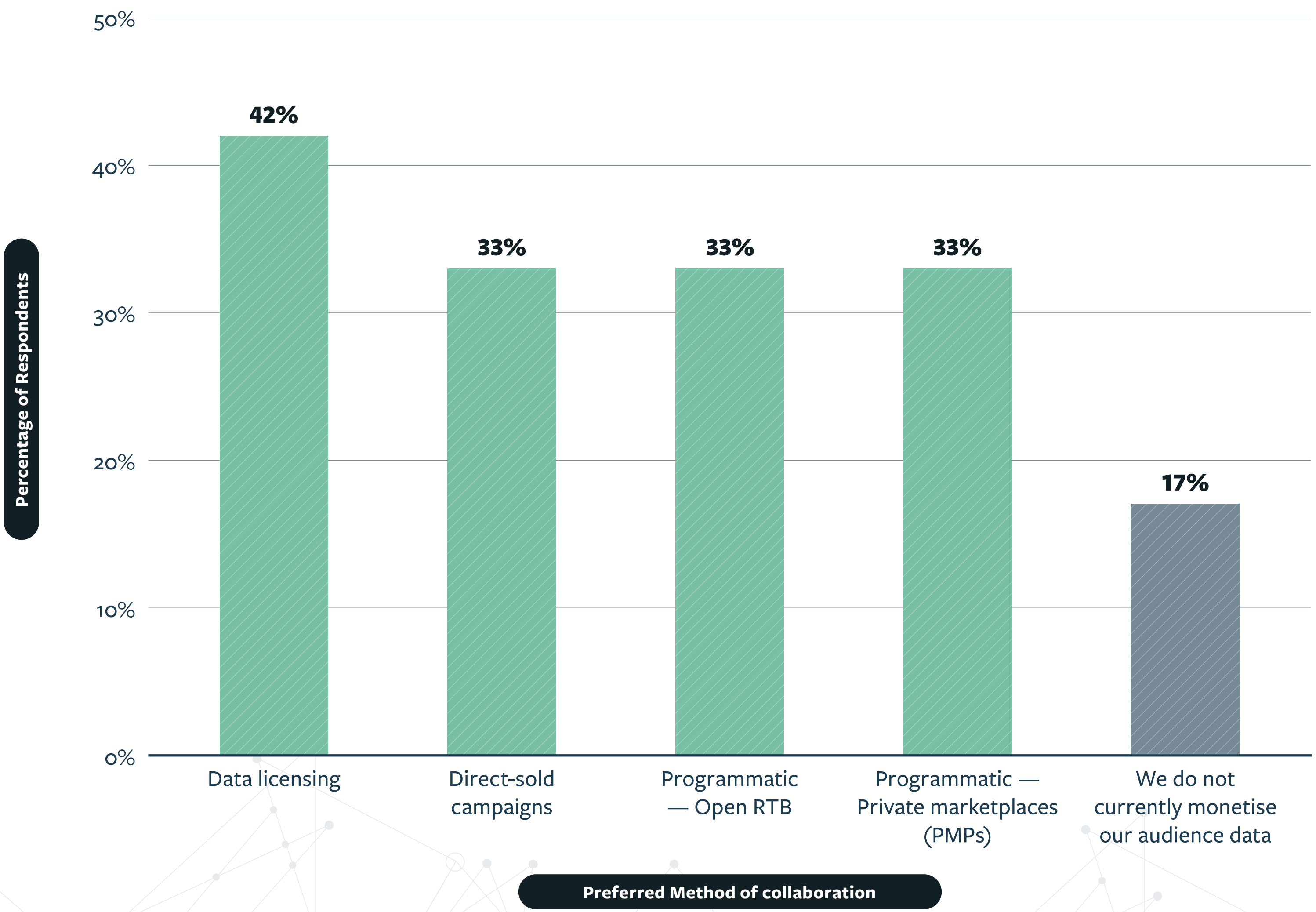
Similarly to collaboration with external partners on user data, publishers across Europe are experimenting heavily with how they monetise their audience data. Data licensing is the preferred method, employed by 42% of publishers, though direct-sold campaigns, programmatic (OpenRTB), and programmatic (PMPs) are each used by one-third (33%) of publishers.

42%

of publishers employed Data licensing as their preferred method

Figure 11: Monetisation of audience data — Europe 2025

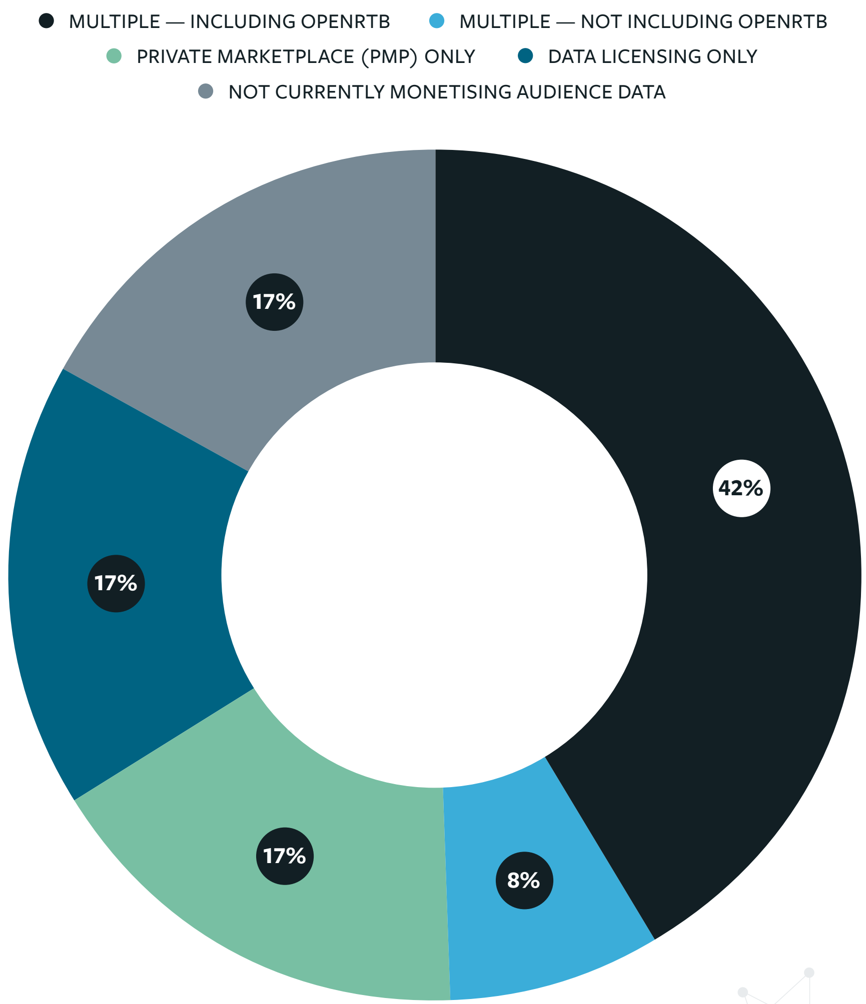


Moreover, half (50%) of surveyed publishers stated that they were using multiple methods of monetising their audience data, while 42% are combining direct deals or licensing agreements with programmatic revenue based upon the OpenRTB protocol.

50%

of surveyed publishers stated that they were using multiple methods of monetising their audience data

Figure 12: Methods for monetising audience data — Europe 2025



Activation of customer data across multiple platforms

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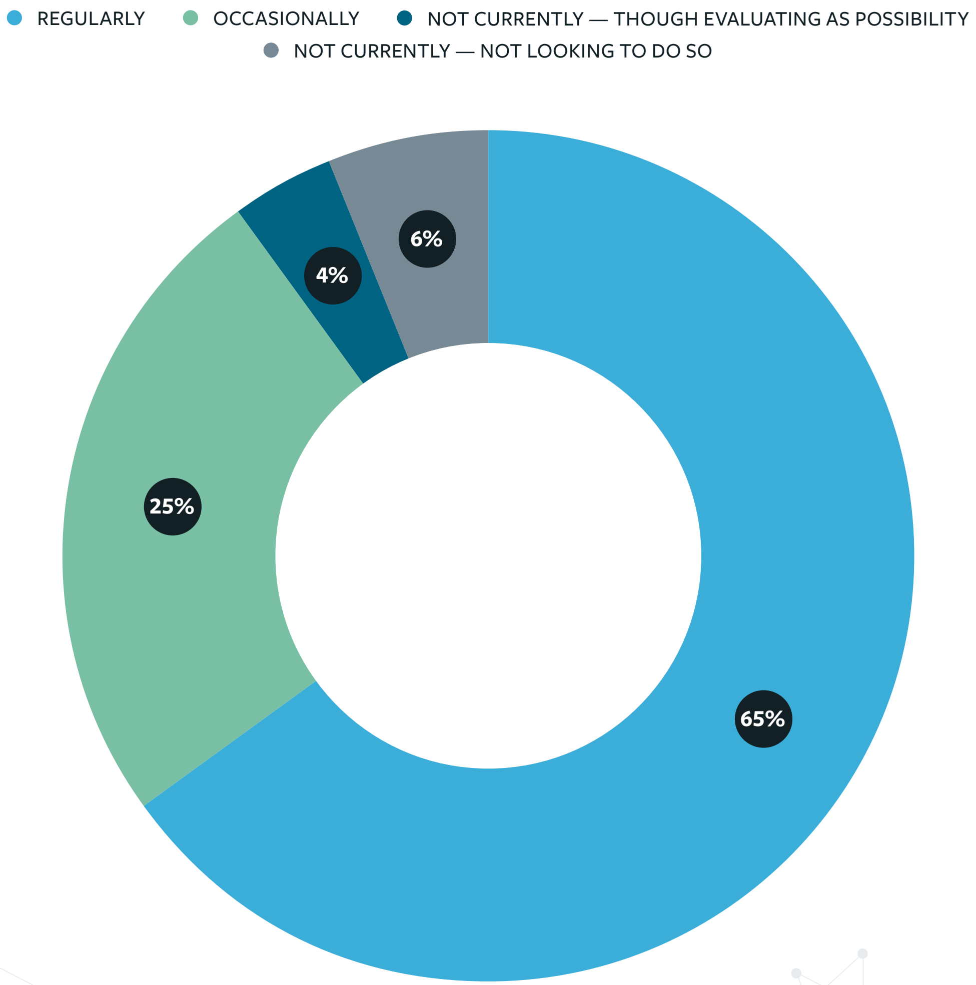
Nine-in-ten surveyed marketers reported that they are activating their customer data across multiple platforms (eg Meta, Google, independent demand-side platforms) on a regular or occasional basis. Contrastingly, only 6% of agencies/brands across Northern Europe are not looking to activate their customer data across multiple platforms going forwards.

90%

surveyed marketers reported that they are activating their customer data across multiple platforms

Figure 13: Activation of customer data across multiple platforms — Europe 2025



Across the monitored markets, marketers operating within the Netherlands were the most active in their activation of consumer data across multiple platforms, with all respondents noting they were doing so. By contrast, 16% of surveyed marketers in the UK stated that they were not activating their customer data across numerous platforms, and had no plans to do so in the future.

Figure 14: Activation of customer data across multiple platforms — Europe 2025 (by market)

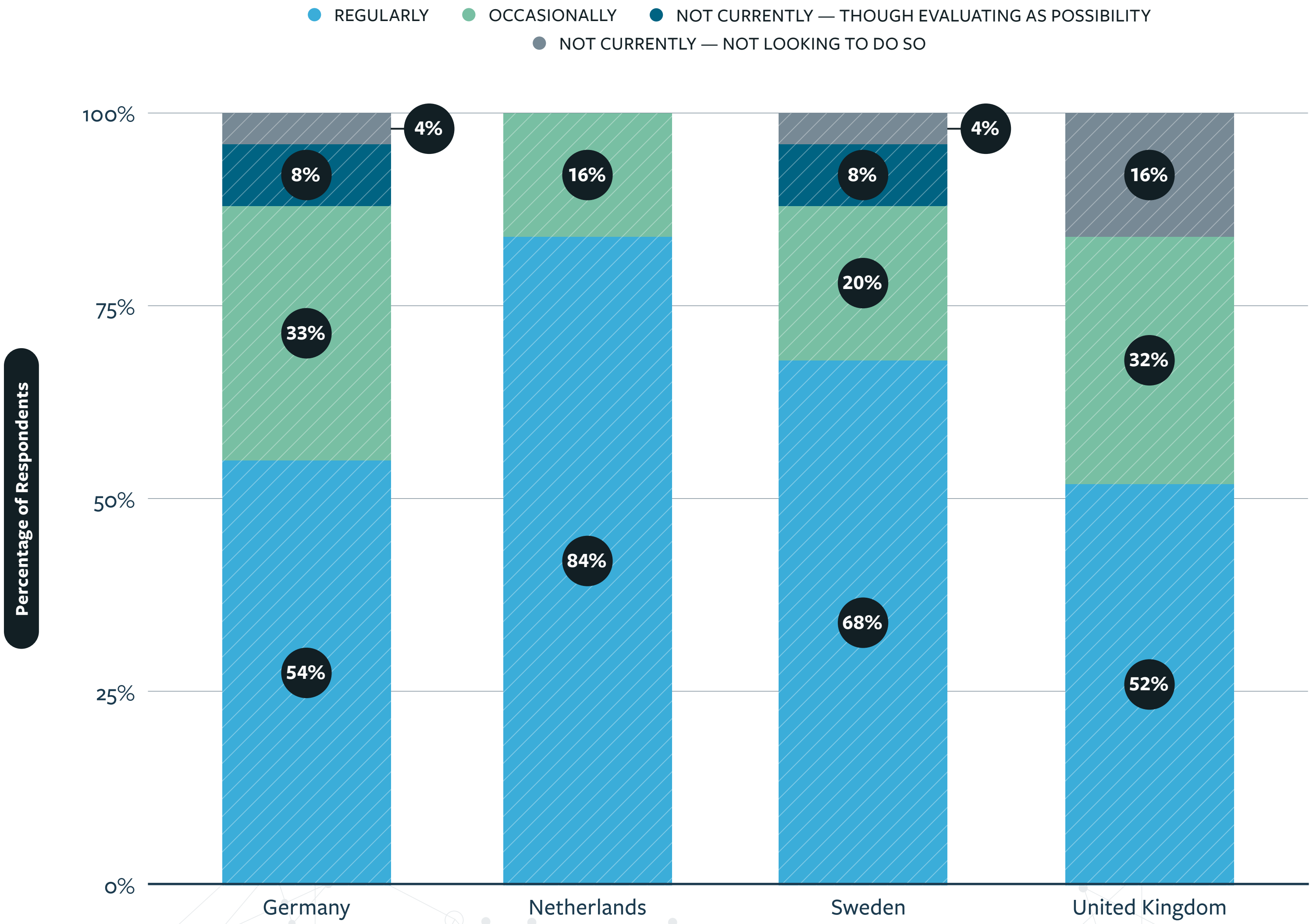
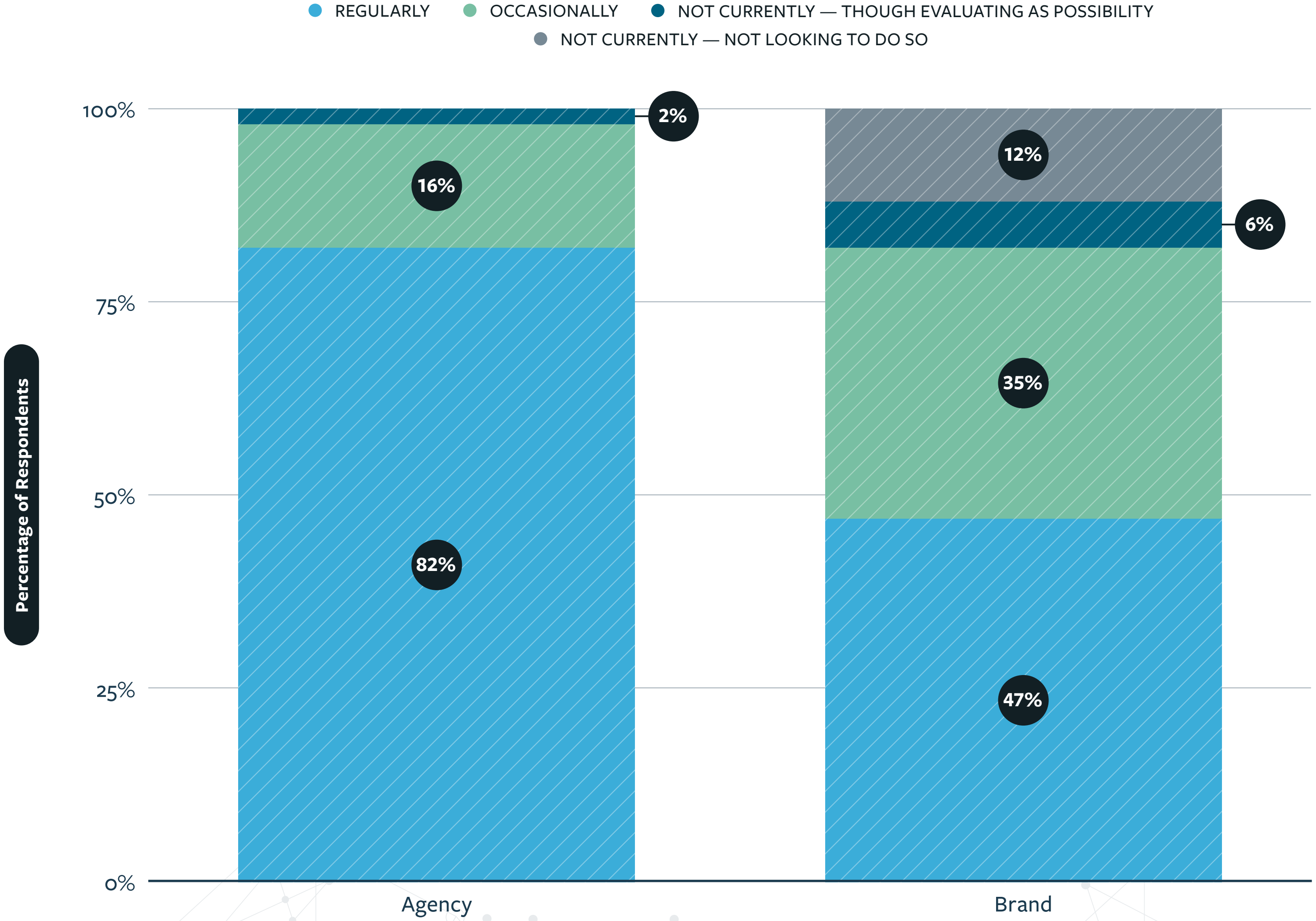
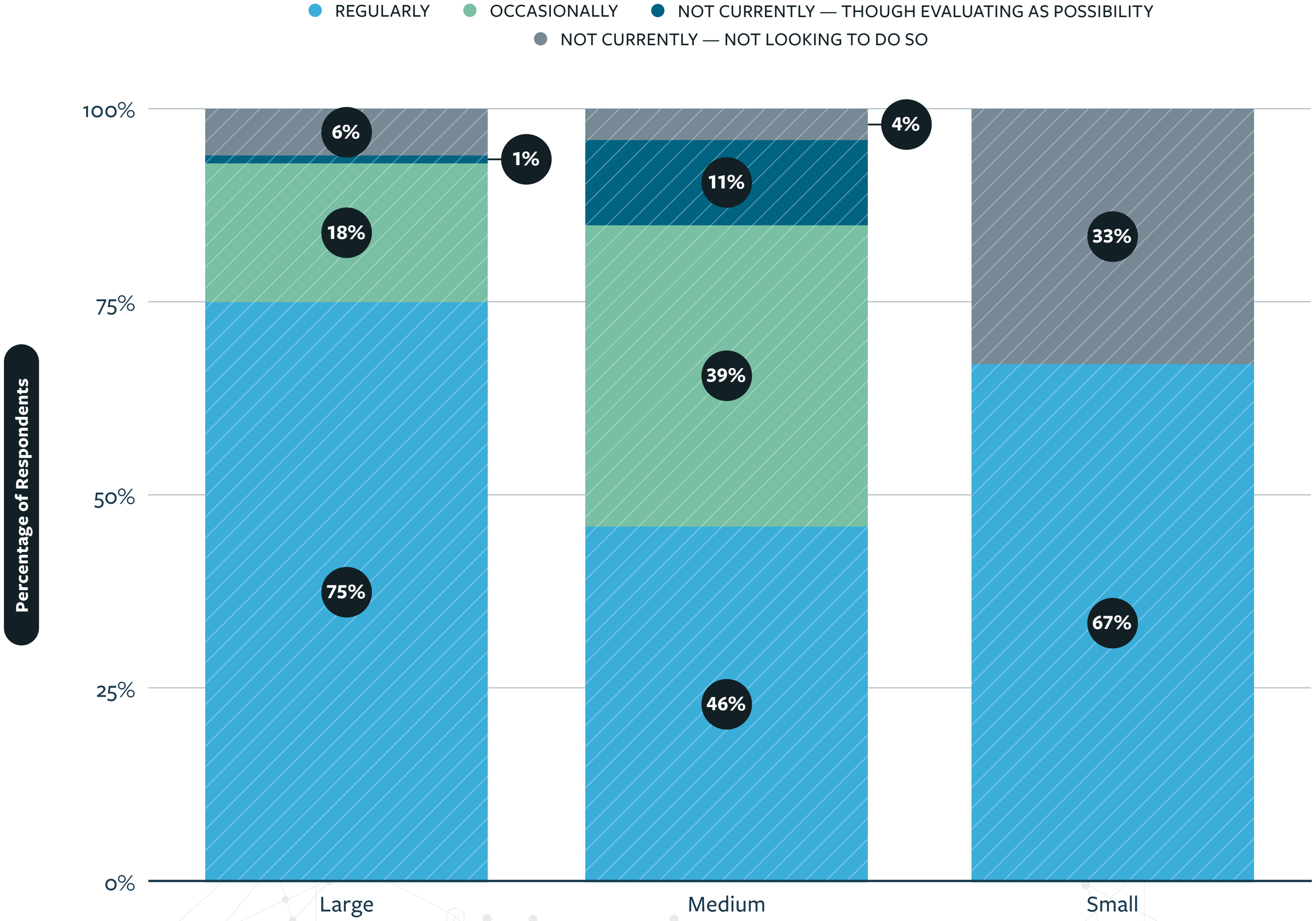


Figure 15: Activation of customer data across multiple platforms — Europe 2025 (by company type)



Notably, all surveyed respondents operating within an agency stated that they were either currently activating their customer data across multiple platforms or were evaluating this as a possibility, whereas 12% of marketers stated that they were not looking to activate their data across numerous platforms.

Figure 16: Activation of customer data across multiple platforms — Europe 2025 (by company size)



Activation of customer data across multiple platforms currently scales with company size across Northern Europe. Three quarters (75%) of respondents operating within a large (>200 employees) brand or agency are regularly activating their customer data across several platforms, versus 46% of respondents in medium (50-200 employees) firms. Concerningly, no surveyed small (<50 employees) company is currently activating their consumer data across multiple platforms, while one-third (33%) state that they have no plans to do so.

“For publishers, data collaboration isn’t just a technical solution—it’s a new commercial opportunity. By securely connecting first-party data with trusted partners, publishers can unlock new revenue streams without compromising user privacy.”

— Remco Steen
Manager Advertising Technology,
Yield & Data at Mediahuis Nederland

Approaches to data onboarding

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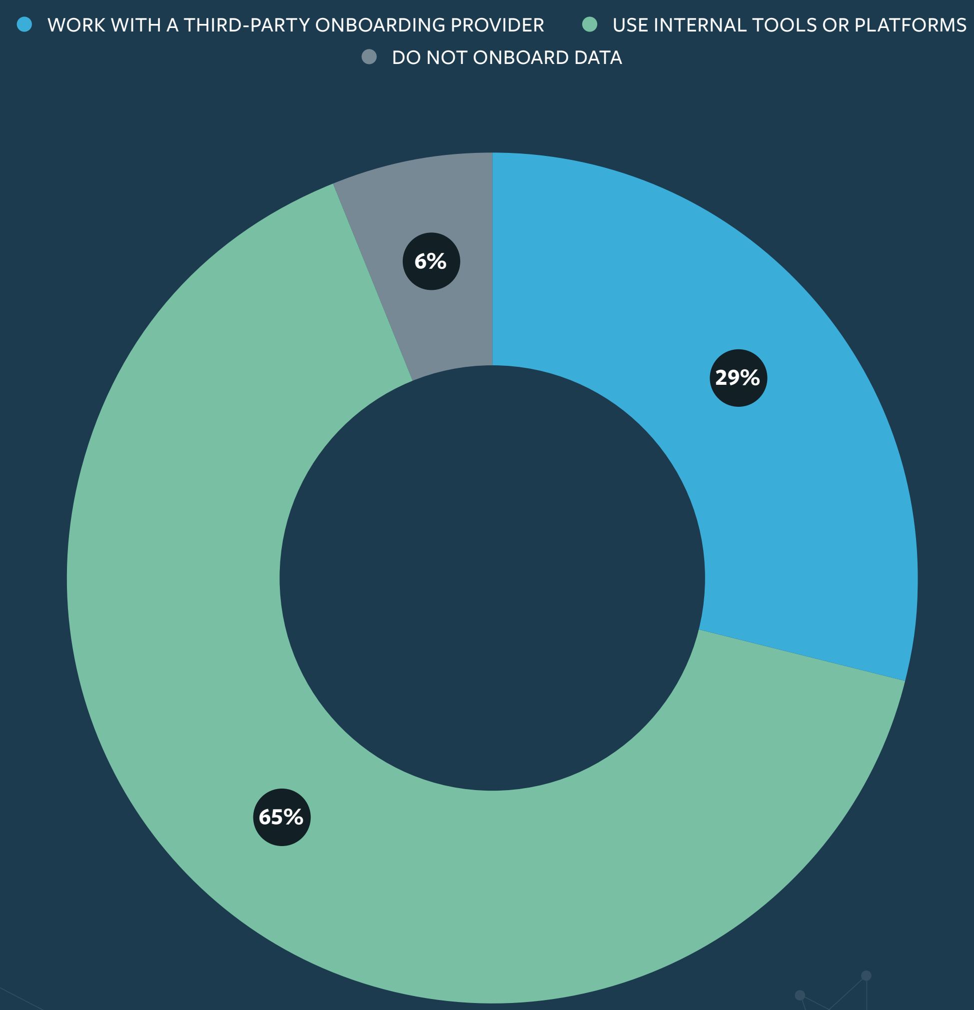
Nearly two-thirds (65%) of surveyed marketers prefer to use internal tools or platforms to onboard data assets, while 29% state that they work with a third-party onboarding provider.

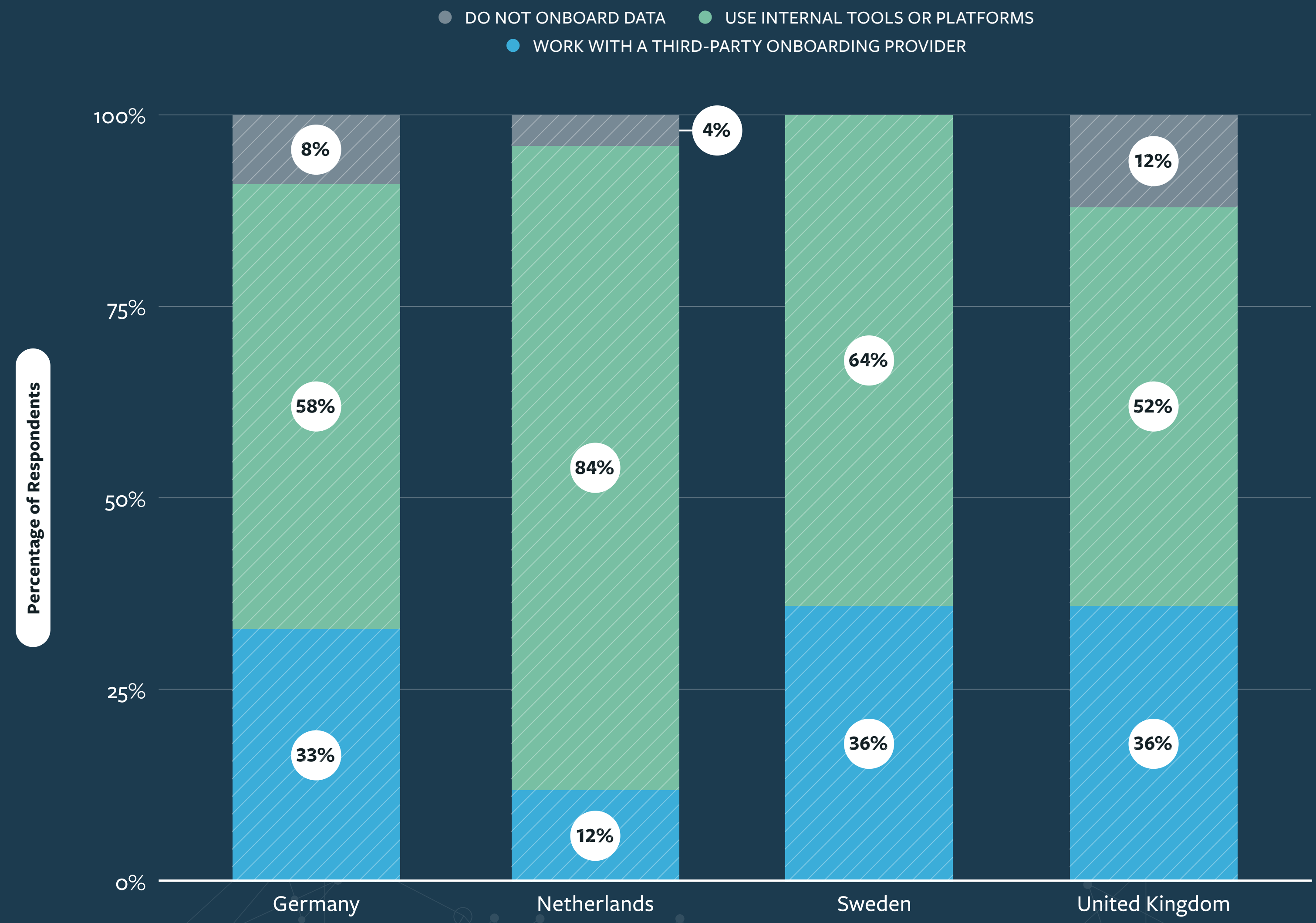
Figure 17: Approaches to data onboarding — Europe 2025



65%

of surveyed marketers prefer to use internal tools or platforms to onboard data assets

Figure 18: Approaches to data onboarding — Europe 2025 (by market)



The overriding majority (84%) of surveyed marketers within the Netherlands use internal tools or platforms to onboard data, with only 12% here using third-party onboarding providers. By contrast, at least one-third of respondents across the remaining surveyed respondents prefer to work with third-party onboarding partners.

84%

of surveyed marketers within the Netherlands use internal tools or platforms to onboard data

Figure 19: Approaches to data onboarding — Europe 2025 (by company type)

Unlike previous findings covering the activation of data across multiple platforms, marketers operating within an agency operate a highly similar approach to data onboarding as their brand counterparts, though respondents in brands have a marginally greater preference for working with third-party onboarding partners (31% versus 28%).

65%

of surveyed brands use internal tools or platforms

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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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