



STREAMING TV UNCOVERED: A MARKETERS' SURVEY

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Introduction

As 2026 approaches, the marketing landscape is poised for a year of cautious optimism tempered by economic pragmatism. With global growth prospects remaining sluggish and macroeconomic volatility persisting, European businesses are bracing for a period of flat or modest marketing investments. The complex economic situation—marked by inflationary pressures, geopolitical tensions, and shifting consumer behaviours—has compelled brands to adopt a more conservative approach to their marketing budgets.

Marketing spend levels are poised to stagnate, so marketers are strategically reallocating resources. In that context, CTV/Streaming TV has emerged as a standout priority, capturing a growing share of ad dollars as brands seek to connect with audiences who are increasingly turning to on-demand and ad-supported streaming platforms. This shift reflects a broader industry recognition: in an era of fragmented attention, the ability to engage viewers in a high-impact, brand-safe environment is more valuable than ever.

Methodology

For the 6th year running, we partnered with Longterm Colab, an independent media research firm, to conduct a study to understand how marketers - advertisers and agencies - across five European countries are thinking about their marketing budgets, adjusting spend priorities and preparing for the year ahead.

500 Respondents

Surveys completed by marketers in UK, France, Germany, Italy and Spain. Conducted in July/August 2025.

50% Advertisers | 50% Agencies

All respondents were qualified as marketing decision makers or influencers.

43% Global | 42% Local

Responsibility for marketing budgets.

Definition:

For the purpose of this survey, streaming TV encompasses all forms of premium video content delivered via an internet connection including scheduled, live and on-demand TV from ad-supported video-on-demand services (AVOD), BVOD, FAST or Hybrid VOD (HVOD-paid subscription with ads). For example, TF1+, Channel4, VTM GO, Viaplay, PlutoTV, Vevo, Max, Amazon Prime, Netflix, etc.

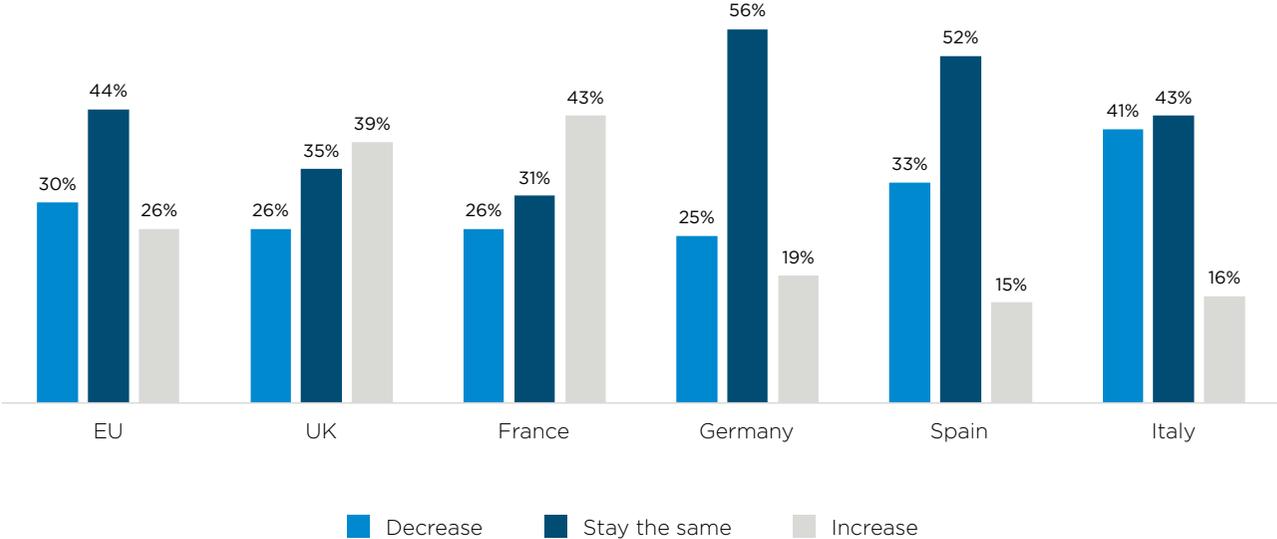
Budget Spend Expectations

Marketing budget expectations

The global macro-economic tensions, combined with local political and economical uncertainties, are creating weak growth perspectives with European marketers expecting their overall budgets to remain flat.

This depicts a very similar picture compared to last year with a net -4% budget growth. The UK and France are both, however, seeing high levels of optimism in regards to budget increase. Both countries are likely willing to invest more to boost dire consumer spends.

Marketing budgets change over the next 12 months



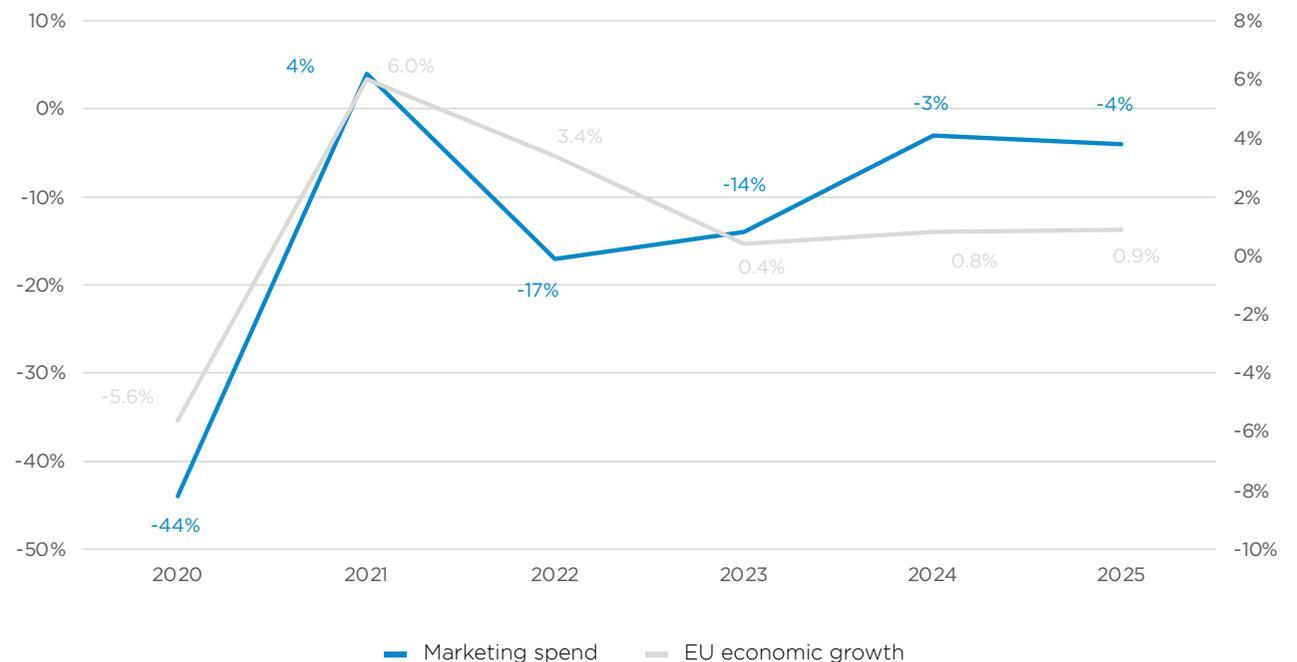
Source: Comcast Advertising and Longterm Colab- Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: How do you expect your overall marketing budgets to change over the next 12 months?

Marketing budgets follow economic growth

Budget expectations and economic growth are very much aligned and show the close correlation between both the overall economic situation and marketing investment levels. As the economy recovers or slows down, so do marketing budgets.

Agencies and advertisers tend to be on the same page; however, we noticed a stark disparity between France and the UK. Both are expecting budget growth, but this is driven by agencies in the UK, while advertisers are far more positive in France.

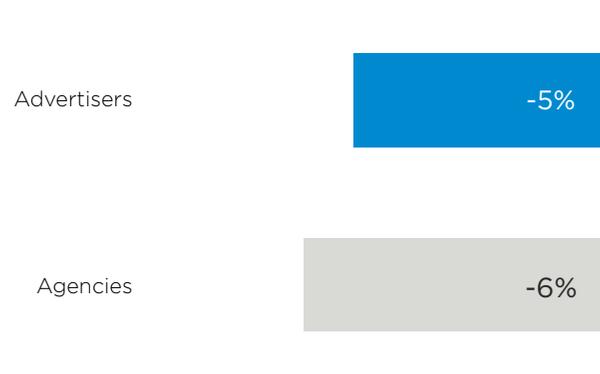
Net change in marketing spend vs. economic growth



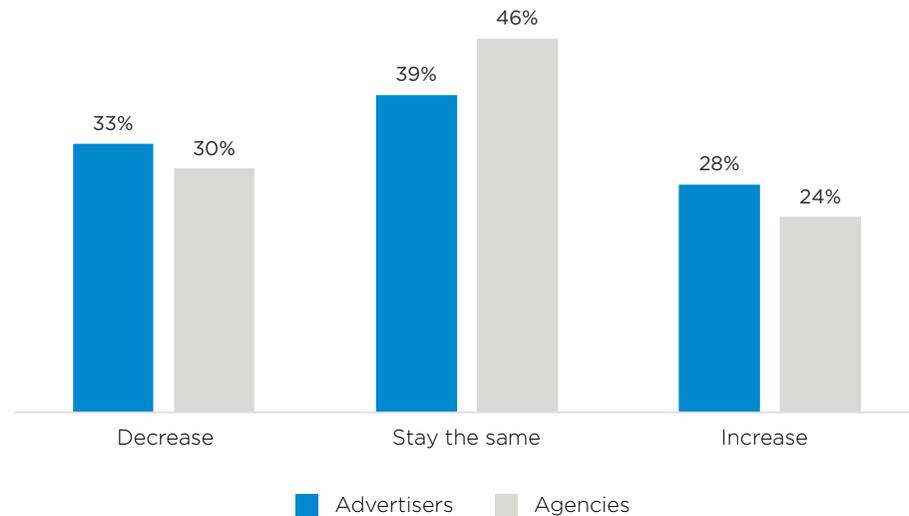
Source: Comcast Advertising and Longterm Colab- Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers: July-August 2025
Question: How do you expect your overall marketing budgets to change over the next 12 months?

Agencies and advertisers aligned on budgets

Net change in marketing spend
(% increase minus % decrease)



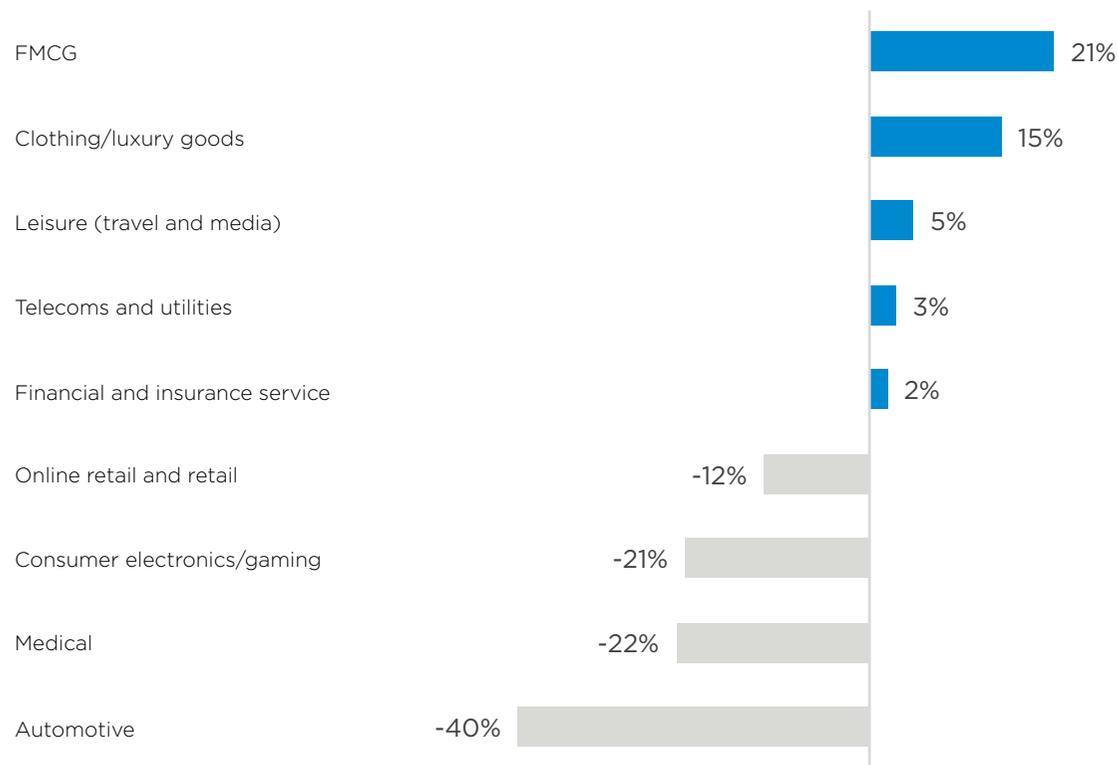
How do you expect your overall marketing budget to change over the next 12 months?



Source: Comcast Advertising and Longterm Colab- Streaming TV Uncovered 2025
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Question: How do you expect your overall marketing budgets to change over the next 12 months?

Marketing budget expectations vary between industry sectors

Net change in marketing spend
(% increase minus % decrease)



Budget expectations vary between industry sectors with FMCG leading the way (similar to last year), while the automotive sector is bracing itself for another very tough year.

With economic growth in Europe unlikely to surpass the 1% level, many sectors are being cautious. As such, telecoms, financial services and leisure have tamed their expectations. On the other hand though, marketers in the highly competitive clothing and luxury goods sector are looking for stronger marketing investments this year, likely to rebuild market share and regain lost customers.

Source: Comcast Advertising and Longterm Colab- Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: How do you expect your overall marketing budgets to change over the next 12 months?

Customer retention remains the top marketing priority

Marketers are this year, once again, prioritising customer retention and building loyalty over all other objectives.

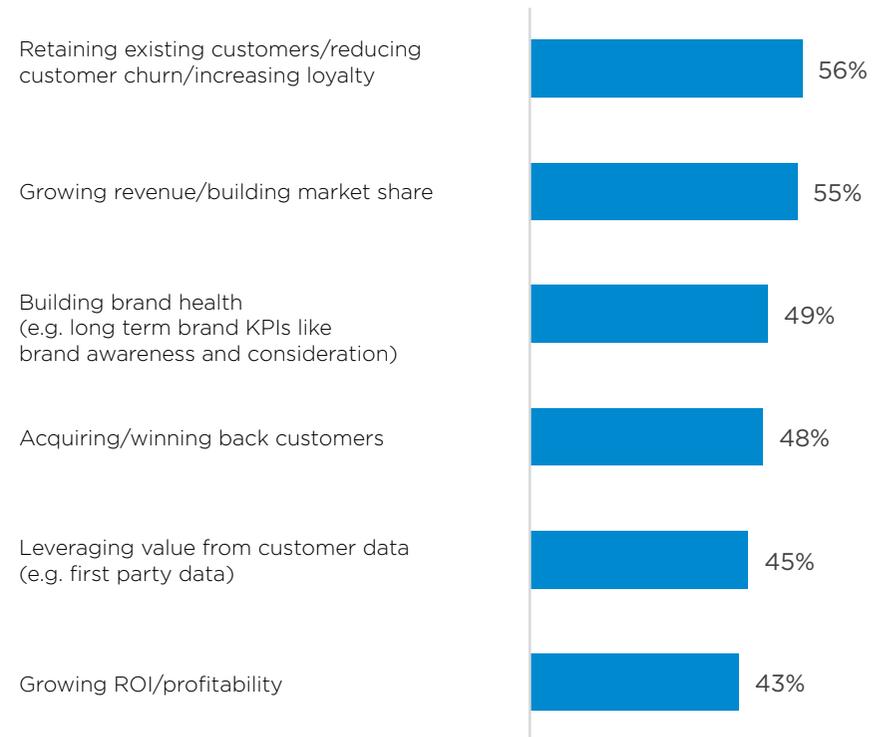
With fresh evidence emerging that a focus on loyalty can have additional brand-building effects and even boost customer acquisition through powerful recommendation effects (see VCCP's The [Long and Short of Loyalty](#) report), it is more important than ever for marketers to optimise their retention efforts.

Revenue and market share growth are also being prioritised over profitability. Yet any concerns that this would point towards a short-termist attitude are tempered by the fact that brand building has climbed into the top three priorities this year; particularly evidenced in the UK. Noticeably, Italian marketers have a different priority this year, with more focus on winning back lost customers.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: **Which of the following overall marketing objectives are currently most important to your business when running ad campaigns?**
(please select the three objectives that matter most to you)

Top marketing objectives

(% ranking 1 to 3)



Customer retention remains the top marketing priority (by country)

Top marketing objectives

(% ranking 1 to 3)

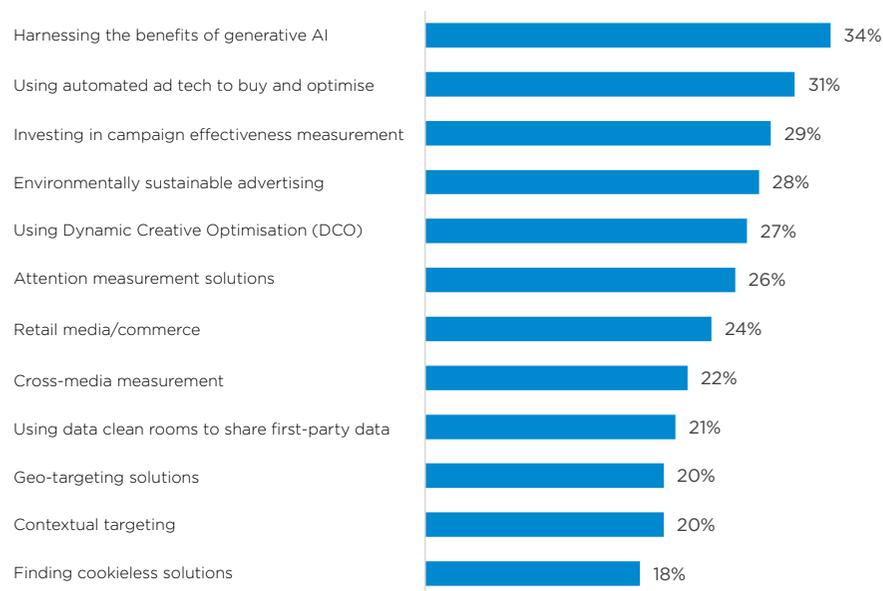
	EU5	UK	France	Germany	Spain	Italy
Retaining existing customers/reducing customer churn/increasing loyalty	56%	54%	60%	58%	57%	51%
Growing revenue/building market share	55%	62%	51%	57%	51%	55%
Building brand health (e.g. long term brand KPIs like brand awareness and consideration)	49%	58%	46%	52%	41%	47%
Acquiring/winning back customers	48%	35%	48%	48%	52%	57%
Leveraging value from customer data (e.g. first party data)	45%	50%	42%	43%	52%	49%
Growing ROI/profitability	43%	39%	46%	38%	42%	39%

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Question: Which of the following overall marketing objectives are currently most important to your business when running ad campaigns?
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AI is marketers' key strategic priority

Top strategy priorities

(% ranking 1 to 3)



Climbing from third place last year, Generative AI is now the number one strategic priority for marketers. From content creation to personalisation, and from automation to social media management, the use cases for AI are now far-reaching.

The [DMA's Customer Engagement 2025](#) report highlights that most current AI use cases are fundamentally efficiency driven – e.g. helping marketers to do more with less. However, marketers must think carefully about AI's effectiveness use cases (e.g. driving more impactful marketing comms) if it is to be used to defend and grow marketing budgets. It is encouraging, therefore, that while

using automated ad tech is the second highest strategic priority, investing in campaign effectiveness measurement to quantify real marketing outcomes is a close third this year. The use of Dynamic Creative Optimisation is also a good sign of the importance for marketers to better tailor the creatives to their audiences to drive engagement, responses and loyalty.

It is good to see sustainable advertising breaking into the top 4. A sign that EU marketers are keen to respond to consumer demand for more environmentally conscious products and services. A top strategic priority for French marketers.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2025
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Question: What would you say are your key areas of priorities for the year ahead when it comes to media strategy?

AI is marketers' key strategic priority (by country)

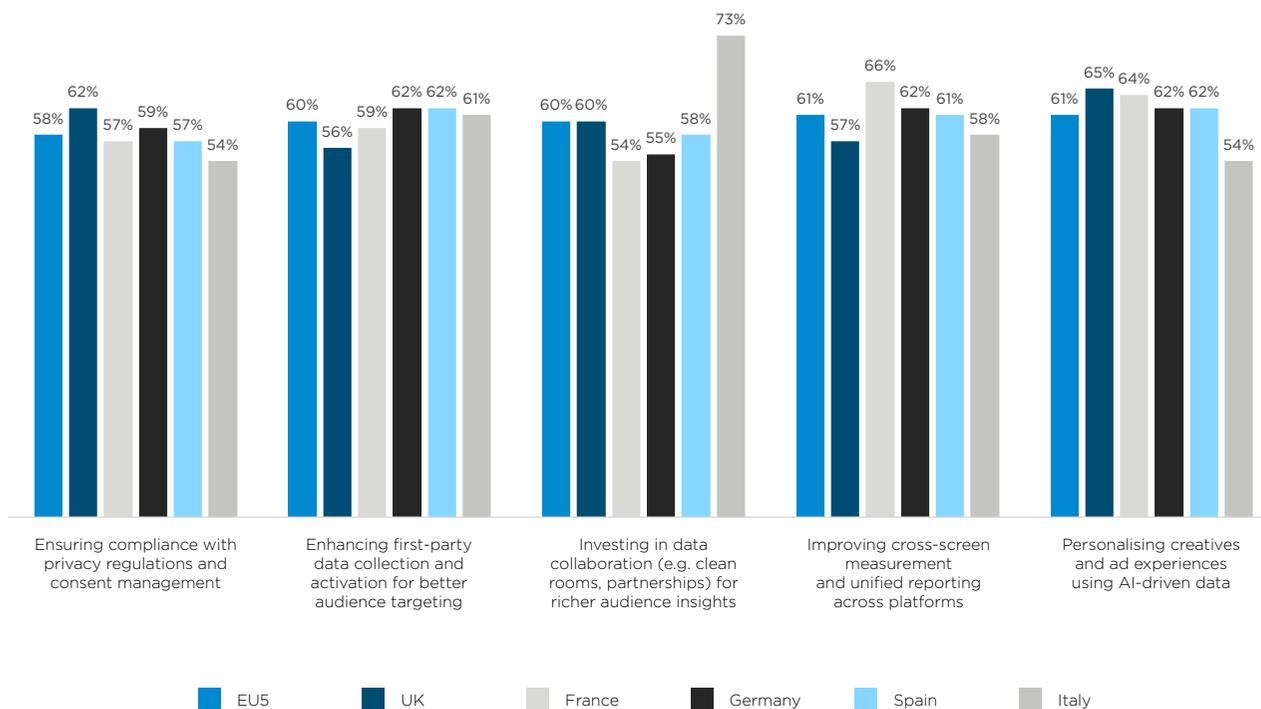
	EU5	UK	France	Germany	Spain	Italy
Harnessing the benefits of generative AI	(3) 34%	31%	(2) 35%	(2) 37%	36%	(3) 29%
Using automated ad tech to buy and optimise	(1) 31%	(3) 32%	33%	29%	(1) 33%	(1) 29%
Investing in campaign effectiveness measurement	(2) 29%	(1) 29%	(3) 26%	(1) 29%	(3) 27%	(2) 33%
Environmentally sustainable advertising	28%	23%	38%	22%	25%	33%
Using Dynamic Creative Optimisation (D.C.O)	27%	33%	24%	(3) 21%	(3) 36%	21%
Attention measurement solutions	26%	26%	31%	23%	25%	26%
Retail media/commerce	24%	25%	(1) 31%	24%	19%	23%
Cross-media measurement	22%	24%	13%	27%	27%	18%
Using data clean rooms to share first-party data	21%	21%	18%	19%	25%	23%
Geo-targeting solutions	20%	(2) 18%	16%	22%	14%	29%
Contextual targeting	20%	22%	17%	23%	19%	19%
Finding cookieless solutions	18%	15%	13%	24%	24%	17%

() indicates last year position

Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: What would you say are your key areas of priorities for the year ahead when it comes to media strategy?

AI and unified reporting drive video data priorities

Video data priorities
(% ranking 1 to 3)



AI is having a profound impact on the creative workflow – from storyboarding to creative asset generation. For many, AI finally brings to life the potential of automation in the Dynamic Creative Optimisation space (a major priority for UK and Spanish marketers), while for global advertisers, processes related to translation and local creative asset tailoring are all being enabled by AI.

Cross-screen measurement and unified reporting across platforms is another key data priority, particularly for French marketers – a process vital for unearthing the streaming TV effectiveness proof-points that key stakeholders demand when it comes to budget sign-off.

Remarkably, for Italian marketers, the use of AI would primarily be to enrich audience data which align with the need for more personalised messages to win back customers.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: Which of the following data-related priorities do you consider most important for your organisation's video advertising strategy for the next 12-months?

Attention no longer an ad-on, but always on

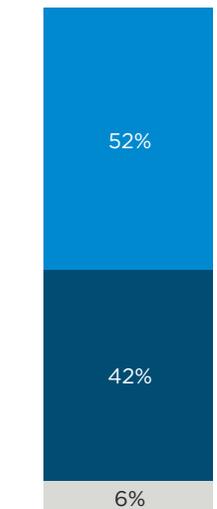
The increased importance of attention measurement has been reported in this survey for the last two years, but now the majority claim to measure it for most campaigns, with only 6% not tracking it at all.

The definition of attention is likely to have a bearing on these results with time-spent and viewability metrics available as standard across the digital ecosystem.

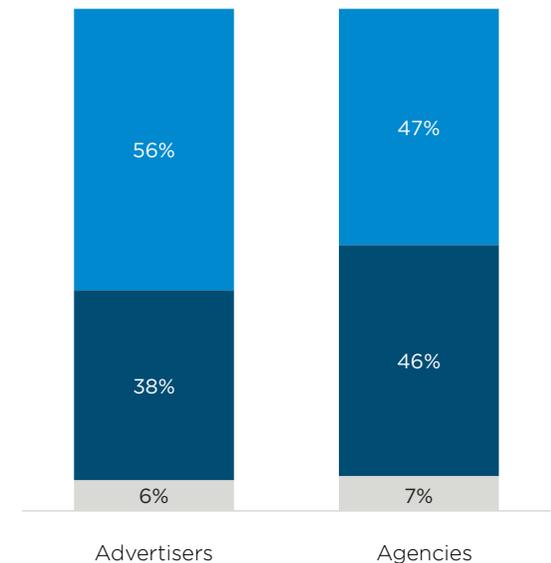
One question remains: how many of these campaigns are looking beyond these basic behavioural metrics to effectively study how long people are looking at ads as opposed to how long they appear on screen (e.g. as measured by attention specialists, such as Lumen or Amplified Intelligence)?



Attention tracking EU5 in 2025



Advertisers vs. Agencies attention tracking



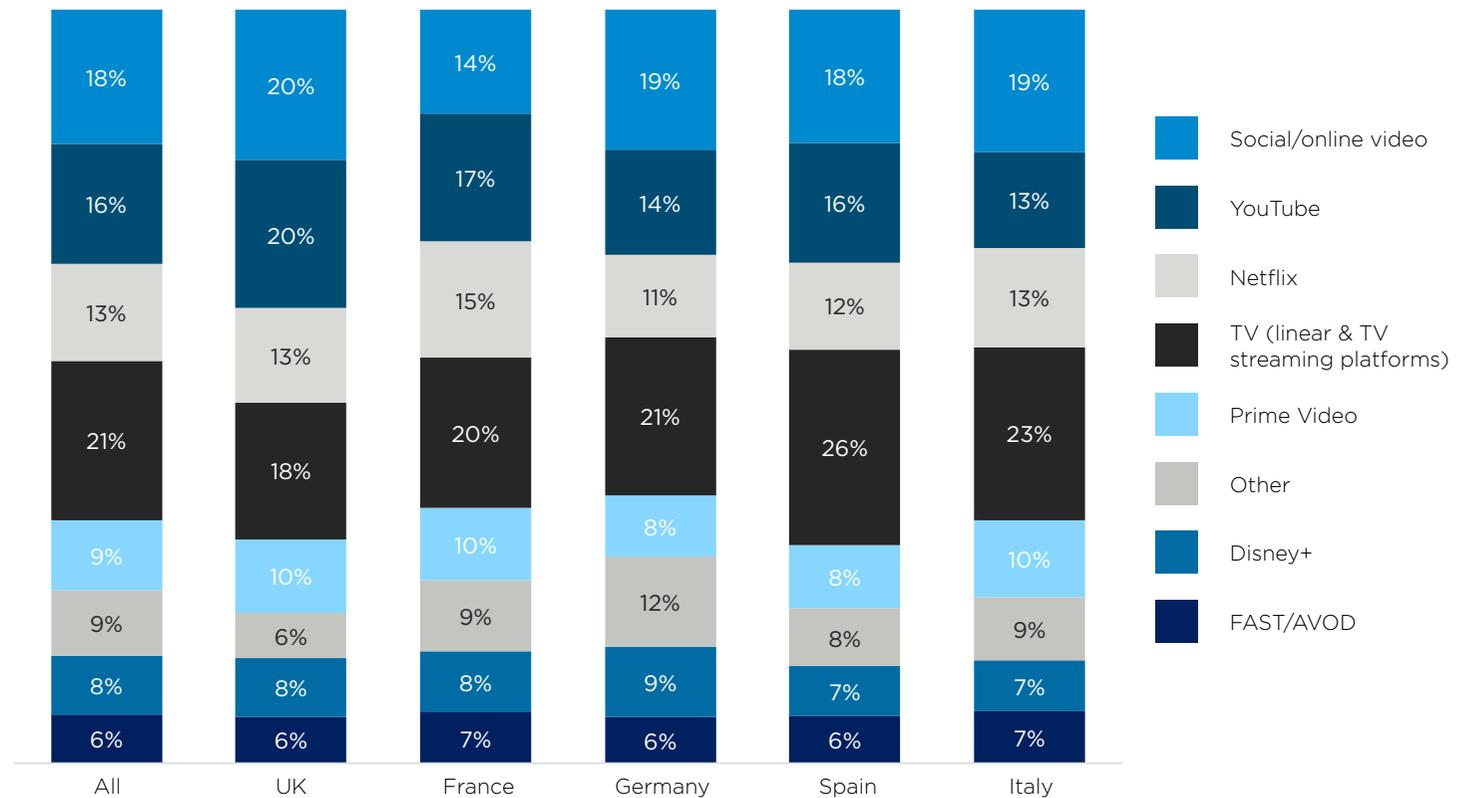
Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: 'Attention' has become an increasingly important metric for measuring campaign performance (Attention refers to the time spent viewing advertising). To what extent have you implemented/used attention as a campaign metric?

Marketers' 2026 Streaming TV/CTV Investment Plans

Annual TV and video budget expenditure by platform (% annual budget)

With audience fragmentation, marketer respondents appear to be prepared to spread their spend across the multitude of video platforms available.

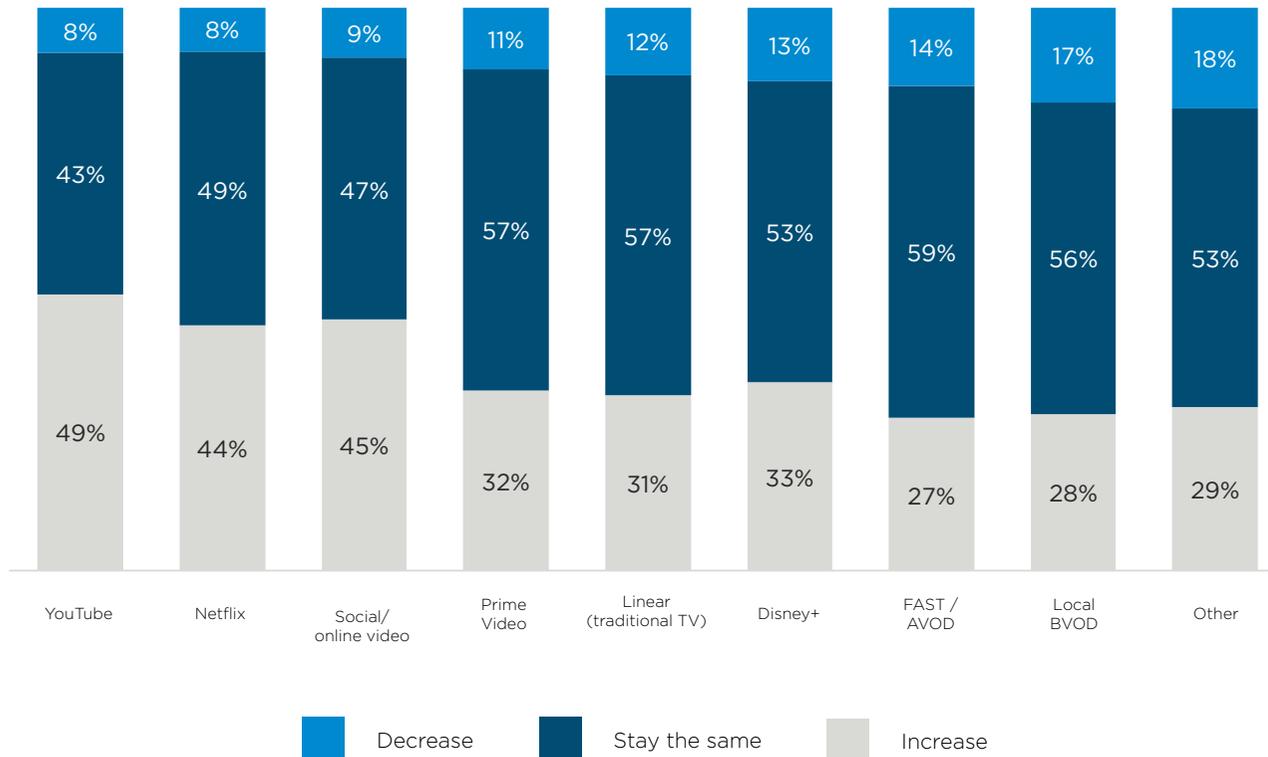
Premium video still attracts the larger share of video investments, but budgets are generally very evenly distributed across platforms.



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: How much of your annual TV and video advertising budget do you spend with the following advertising platforms?

Video investments increase concentrated on three platforms

Spend intentions by platform, next 12 months

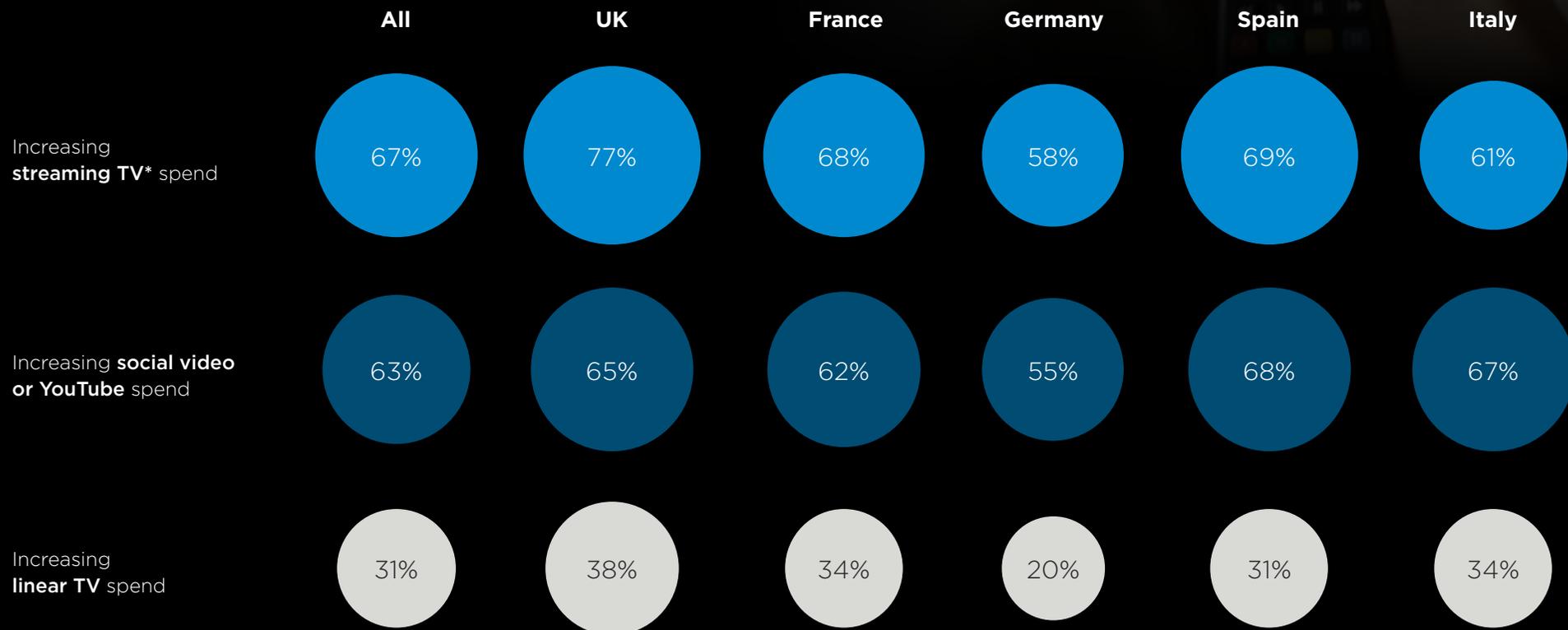


This is further demonstrated here. Investment increases are concentrated on three platforms: online/social video, Netflix and YouTube, the latter being the only platform seeing greater increase than staying the same.

However, looking at premium video as a whole (see next graphic), streaming TV is poised to attract the largest investments, indicating continued appetite for brand-safe, engaging and transparent premium platforms.

Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: Do you intend to increase or decrease how much of your marketing budget is spent with the following TV and video platforms in the next 12 months?

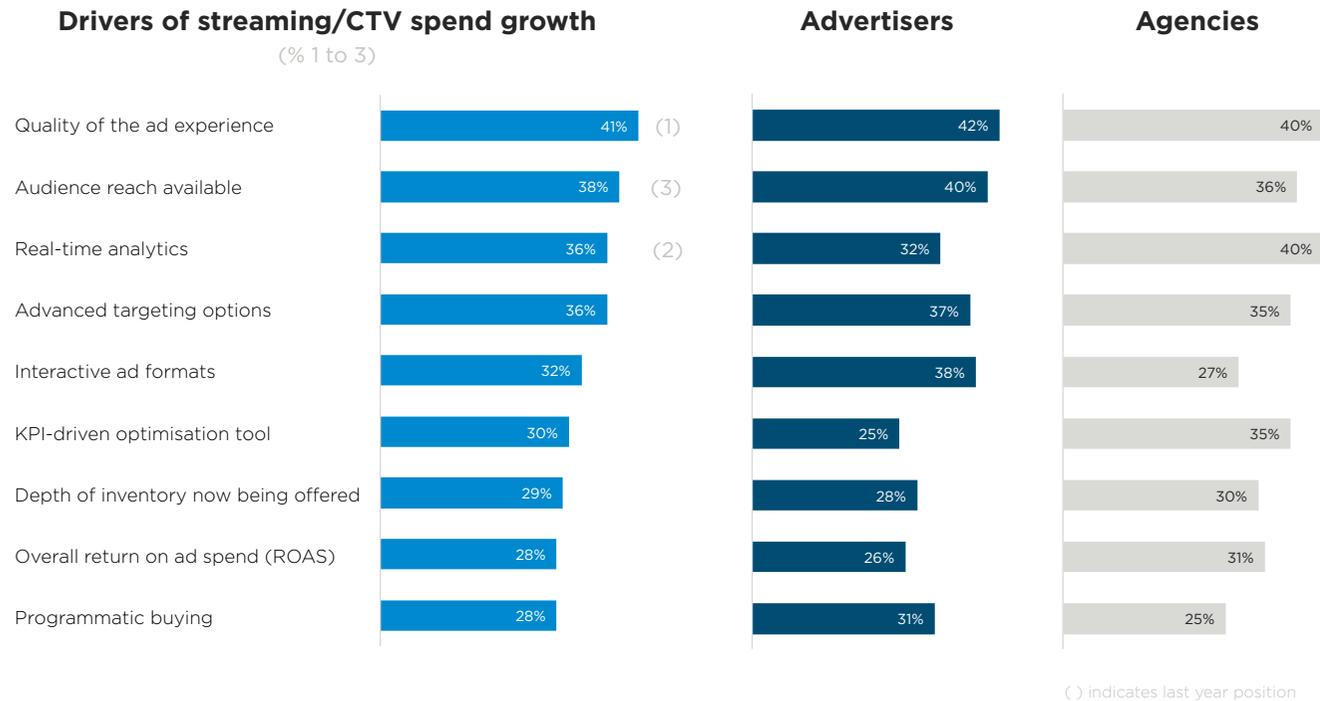
Streaming TV set to attract largest investments



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=500 Marketing Decision Makers & Influencers; July-August 2025
Question: **Do you intend to increase or decrease how much of your marketing budget is spent with the following TV and video platforms in the next 12 months?**

Drivers and Inhibitors of Streaming TV Spend

Quality of the ad experience remains top driver of streaming TV investments



The top-three drivers of streaming TV ad spend are unchanged compared to last year.

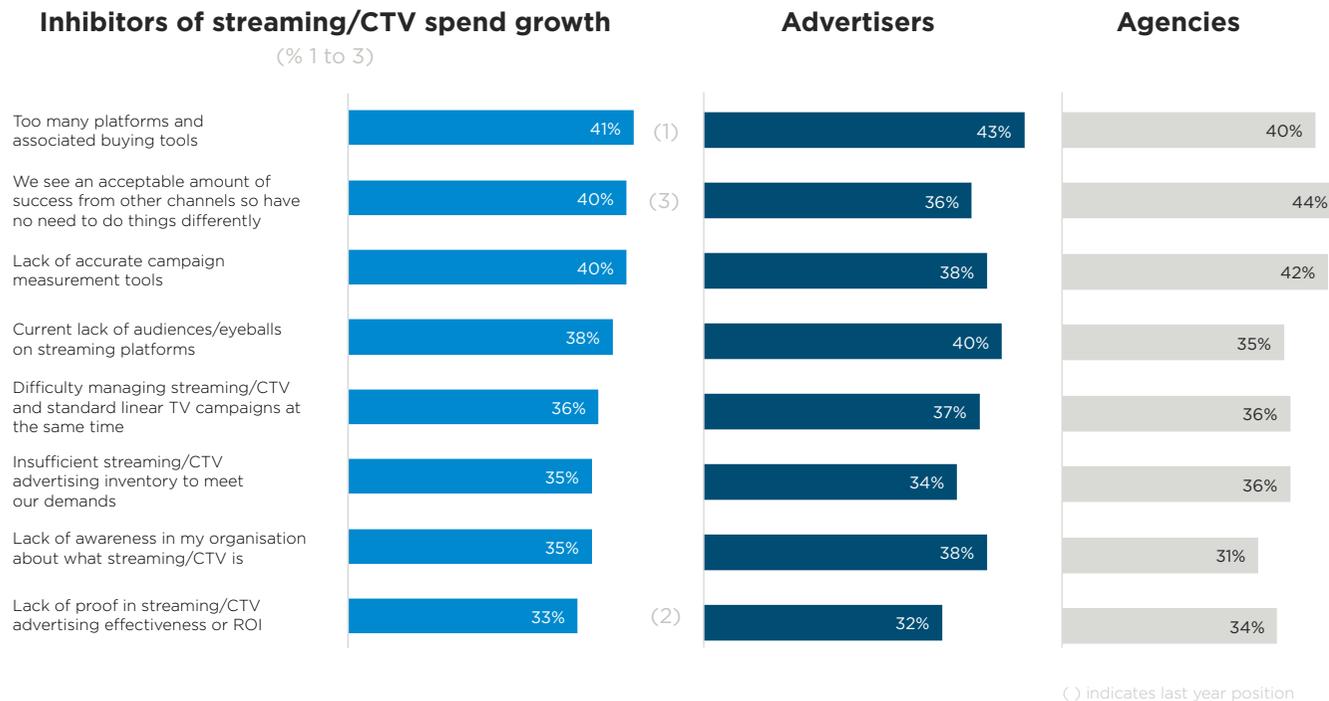
The quality of ad experience remains the number one driver, and with streaming TV perceived to offer high levels of brand impact, the two findings go hand in hand.

The stability of these findings year on year points towards the role of streaming TV beginning to solidify in the minds of marketers. Its benefits and advantages are becoming more naturally entrenched as the medium develops in maturity.

It is interesting to see the differences between agencies and advertisers here. While they agree on the ad experience, agencies are driven by analytics and optimisation tools, while advertisers are more focused on creating new targeted experiences (incl. new ad formats).

Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: With (linear) TV moving into streaming and the proliferation of streaming platforms/apps, in your opinion, what are the key drivers for further investing in streaming/CTV advertising platforms?

Platform proliferation is hindering streaming TV expansion



As covered in the previous section, the streaming TV market is a fragmented and complex one, and its complexity continues to be a major inhibitor to spend growth.

Considerable marketer time and effort is required to plan and trade across different platforms. The accumulation of platforms and associated buying tools is a hurdle that must be overcome to drive growth.

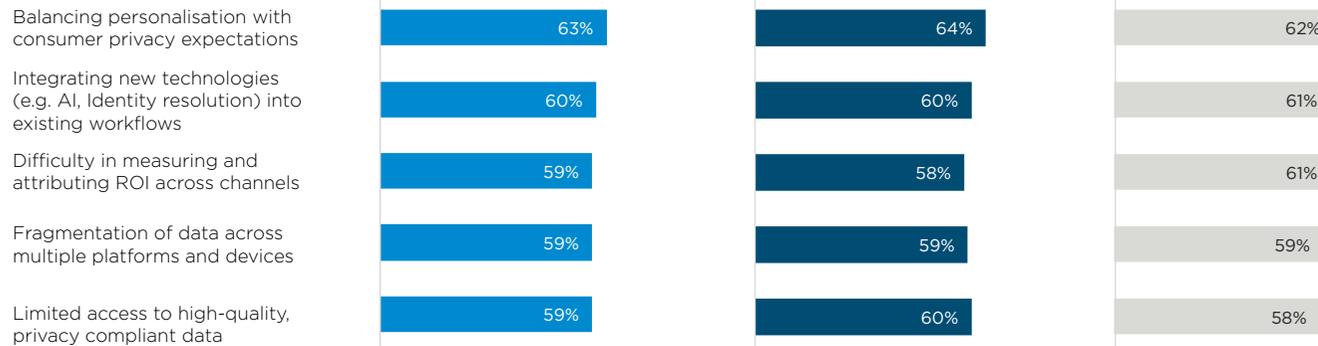
It is good to see that the proof of effectiveness associated to CTV and streaming is no longer an issue for marketers. However, a degree of conservatism or inertia has crept in this year, with marketers – agencies in particular – claiming they see acceptable success with other channels moving up to second place. Unsurprisingly, campaign measurement continues to be a major pain point for agencies.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: In your opinion what stops you investing more of your budget in Advanced TV advertising?

Balancing personalisation with privacy is number one data challenge

Challenges in leveraging TV and video data

(% ranked 1 to 3)



There is a strong consensus between advertisers and agencies on data challenges, led by balancing personalisation with consumer privacy expectations. This is a major conundrum in an ever more data-driven environment and one where new technologies and AI are bringing additional targeting opportunities.

It will be interesting to understand how this will evolve following the recent announcement by Google to close the Privacy Sandbox chapter.

What's illuminating in this chart is the alignment between marketers, but also how they need to juggle with all these data priorities at the same time.

Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=500 Marketing Decision Makers & Influencers; July-August 2025
 Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

A woman with long, wavy, reddish-brown hair is smiling and looking at a tablet device held by another person. The background is a blurred indoor setting, possibly a library or office, with bookshelves visible. The lighting is warm and soft, creating a positive and collaborative atmosphere.

The modern marketing landscape is defined by an overwhelming array of channels and platforms, each vying for attention and investment. This fragmentation has made media buying more complex than ever, forcing marketers to navigate a crowded ecosystem while striving to maximise both reach and impact. The challenge lies not just in selecting the right platforms, but in ensuring that each choice aligns with broader strategic goals—whether that’s driving short-term conversions or fostering long-term brand loyalty.

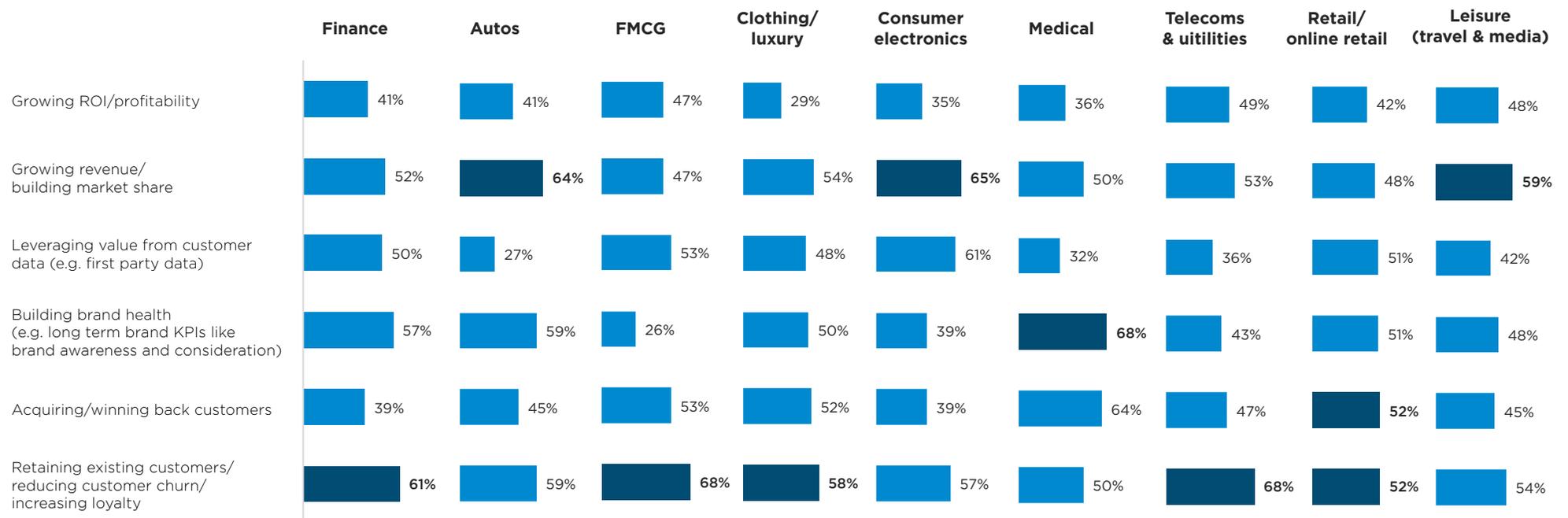
Artificial intelligence is emerging as a powerful ally in this endeavour, offering tools that promise to streamline decision-making and optimise campaigns. However, the adoption of AI must be approached with caution: its true value lies in balancing efficiency with effectiveness, rather than prioritising one at the expense of the other. Amidst this evolution, premium video remains a cornerstone for marketers, uniquely positioned to fulfil their marketing and strategic priorities through rebuilding market share, and nurturing long-term brand health. By leveraging AI thoughtfully and maintaining a focus on high-quality content, marketers can turn complexity into opportunity, ensuring their strategies resonate in an ever-changing digital world.

Industry Sector Cuts

Top marketing objectives by industry sector

Top marketing objectives

(% ranked 1 to 3)

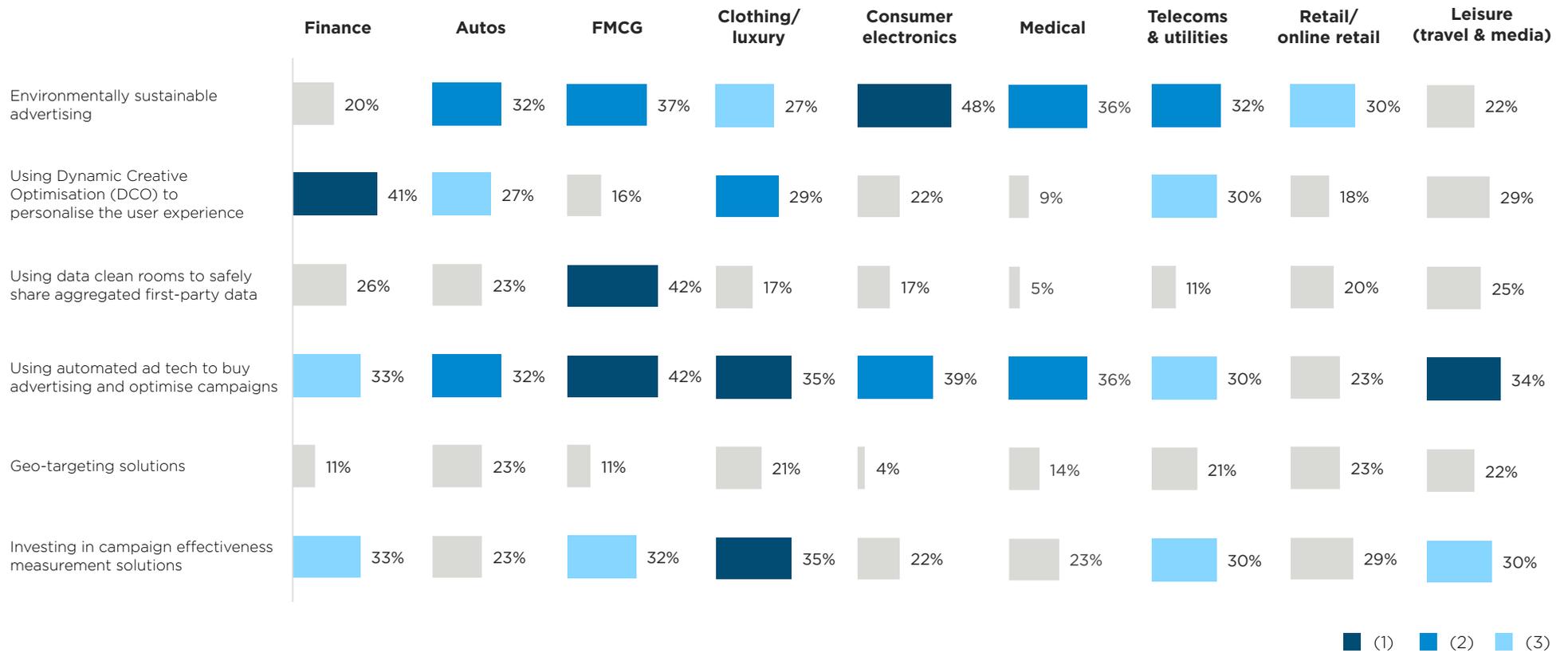


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 (please select the three objectives that matter most to you)

Evident variations on strategic priorities by sector

Part 1

Top strategy priorities in 2025
(% ranked 1 to 3)



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
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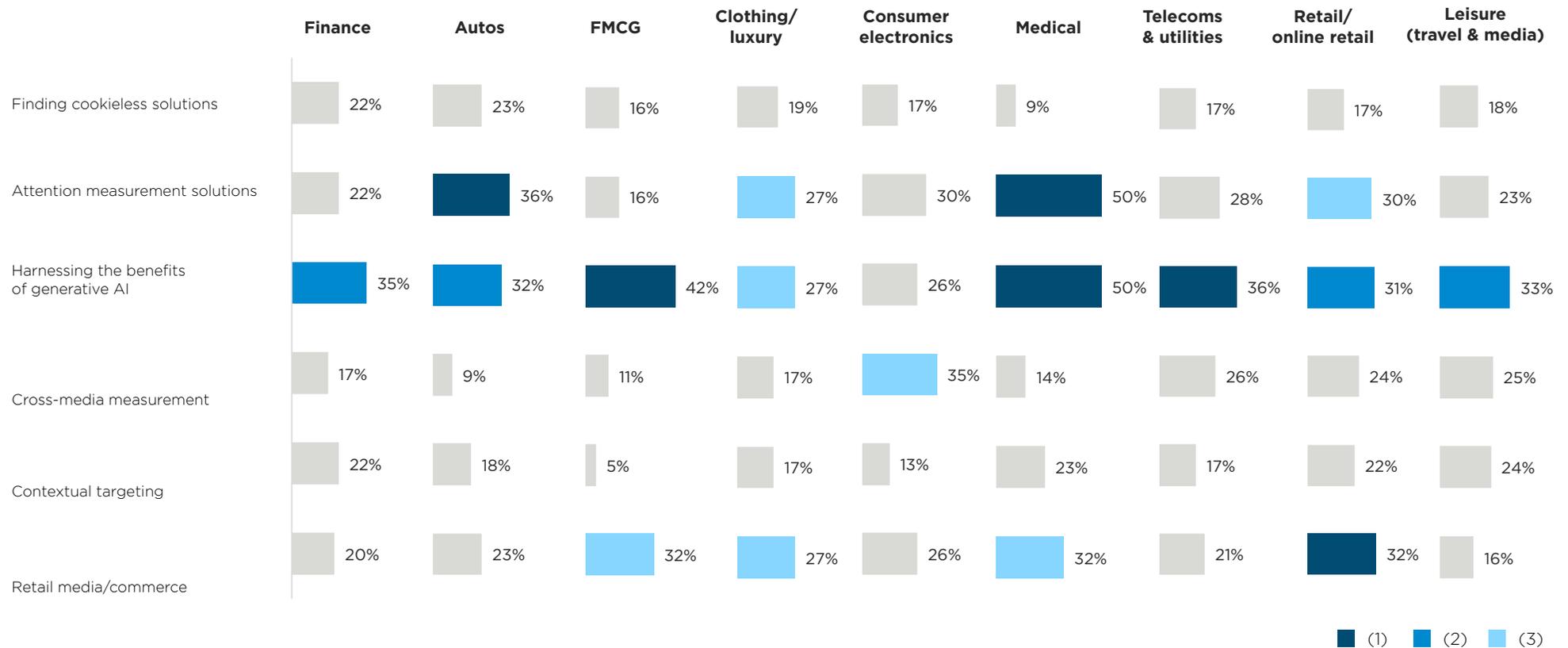
() indicates last year position

Evident variations on strategic priorities by sector

Part 2

Top strategy priorities in 2025

(% ranked 1 to 3)



(1) (2) (3)

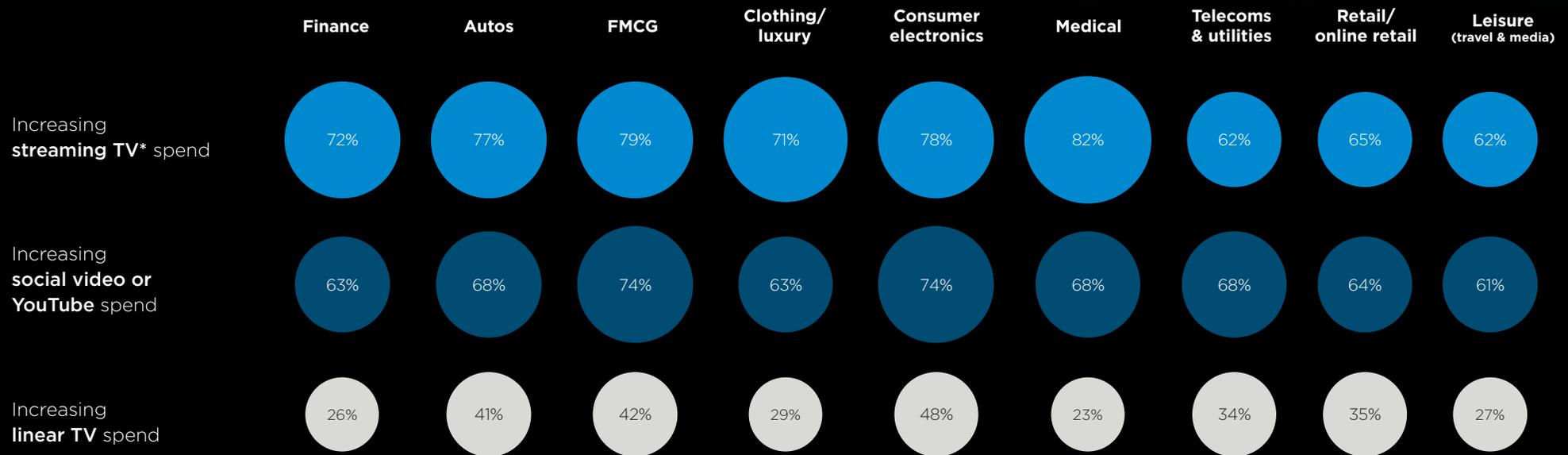
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Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025

n=500 Marketing Decision Makers & Influencers; July-August 2025

Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

Streaming TV investments is a must for all sectors



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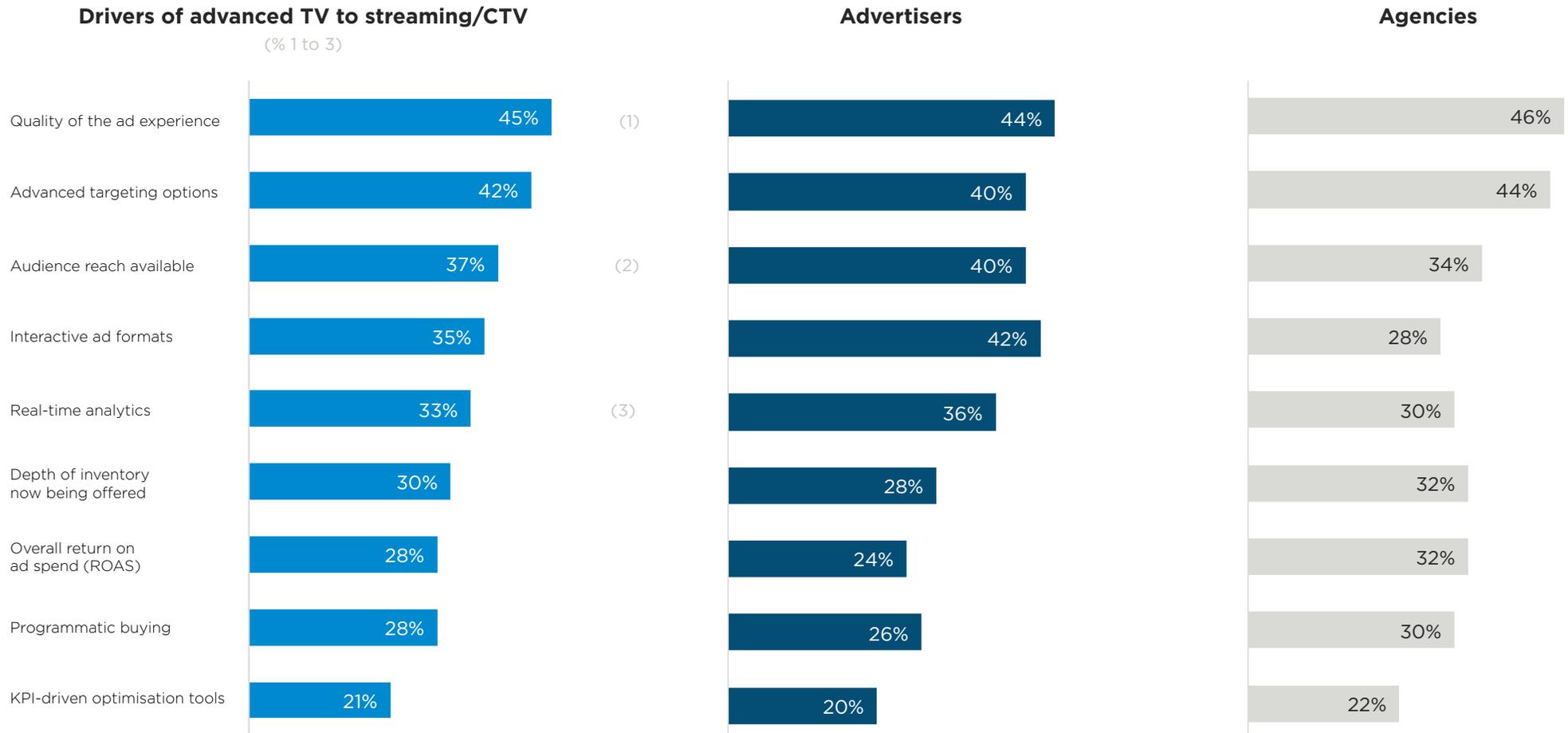
Annex - Country Specific Data

Annex - Country Specific Data

Drivers of Streaming TV Spend

Drivers of streaming TV investments

UK

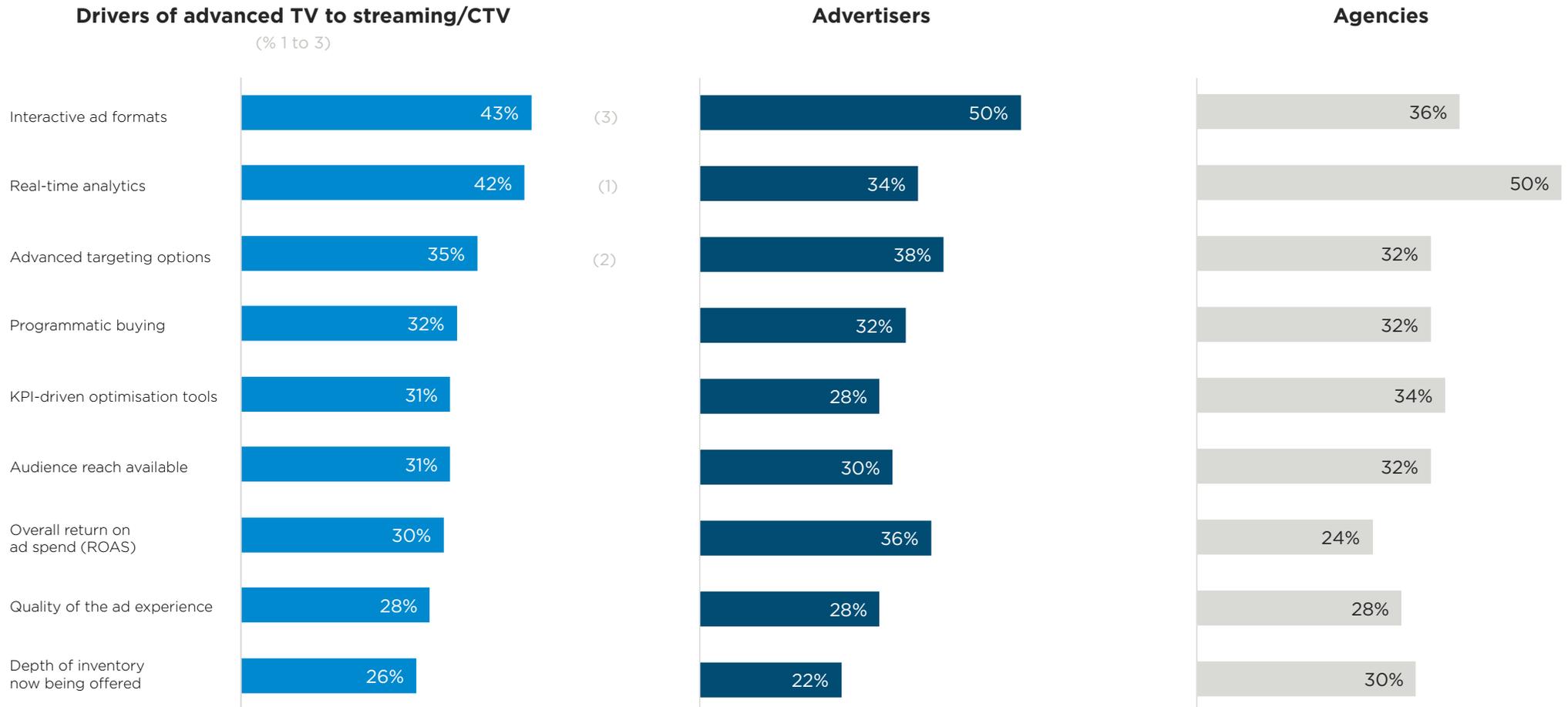


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Drivers of streaming TV investments

France

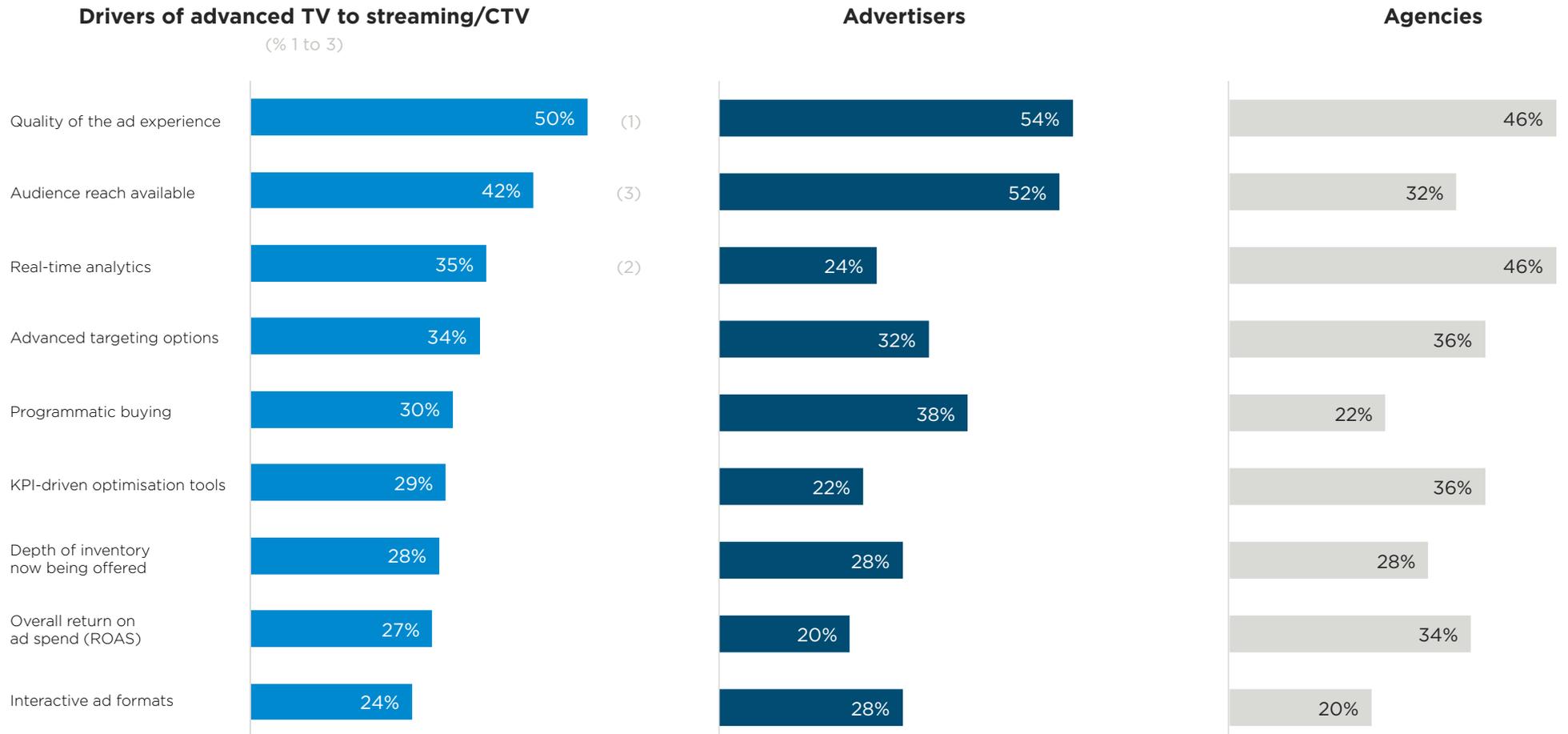


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Drivers of streaming TV investments

Germany

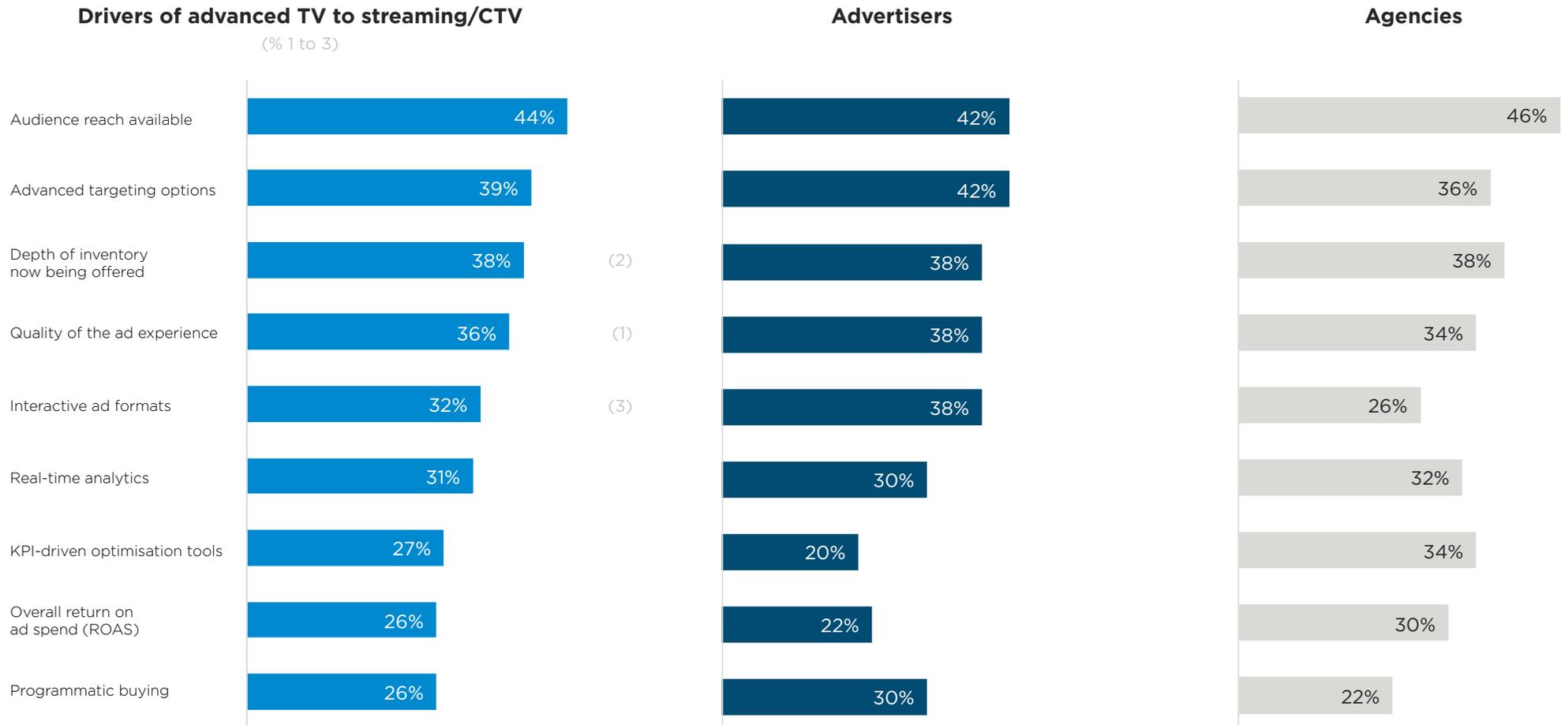


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Drivers of streaming TV investments

Spain

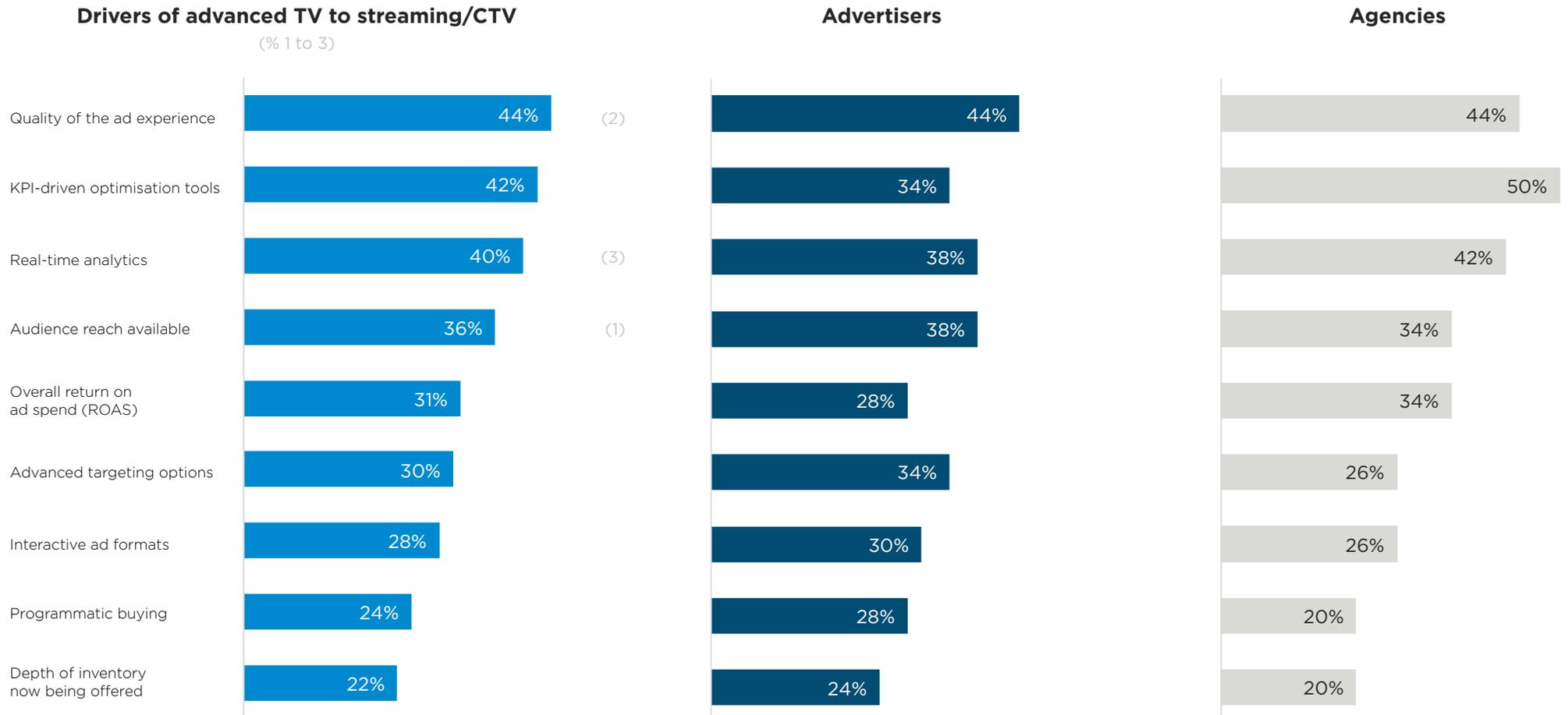


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Drivers of streaming TV investments

Italy



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Annex - Country Specific Data

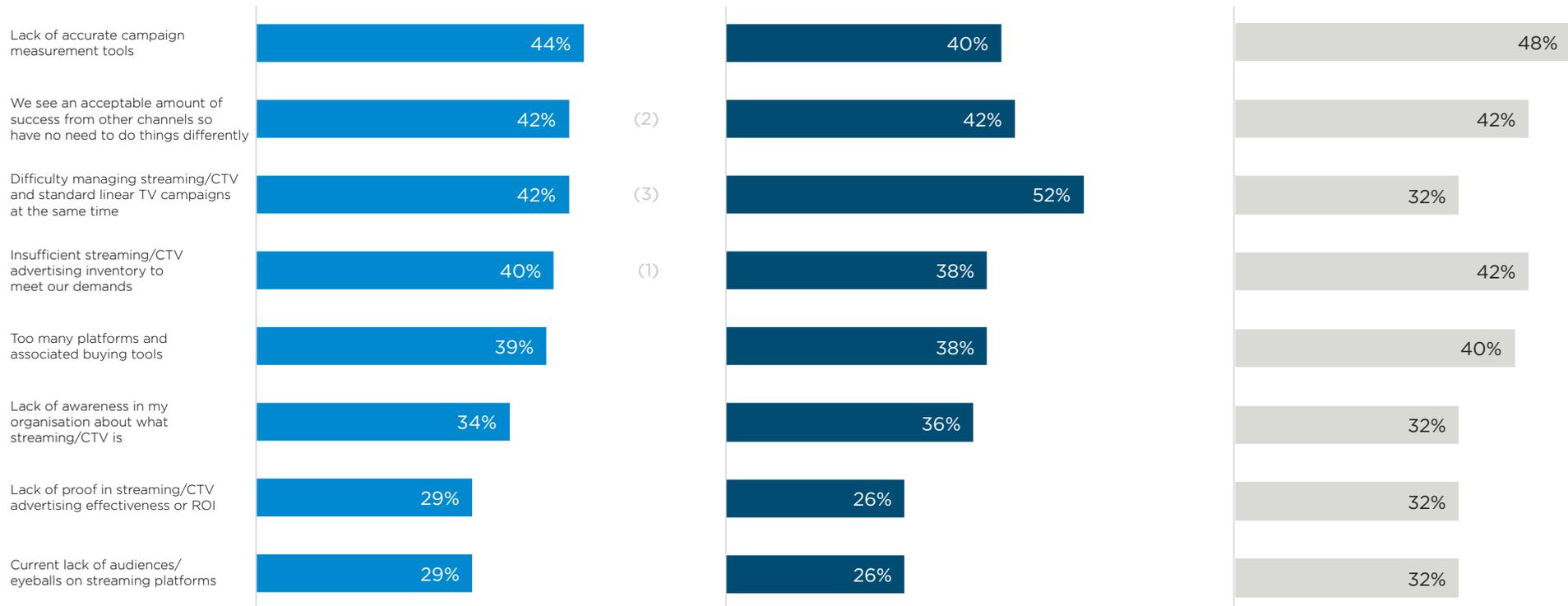
Inhibitors of Streaming TV Spend

Inhibitors of streaming TV spend

UK

Advanced TV to streaming/CTV

(% 1 to 3)



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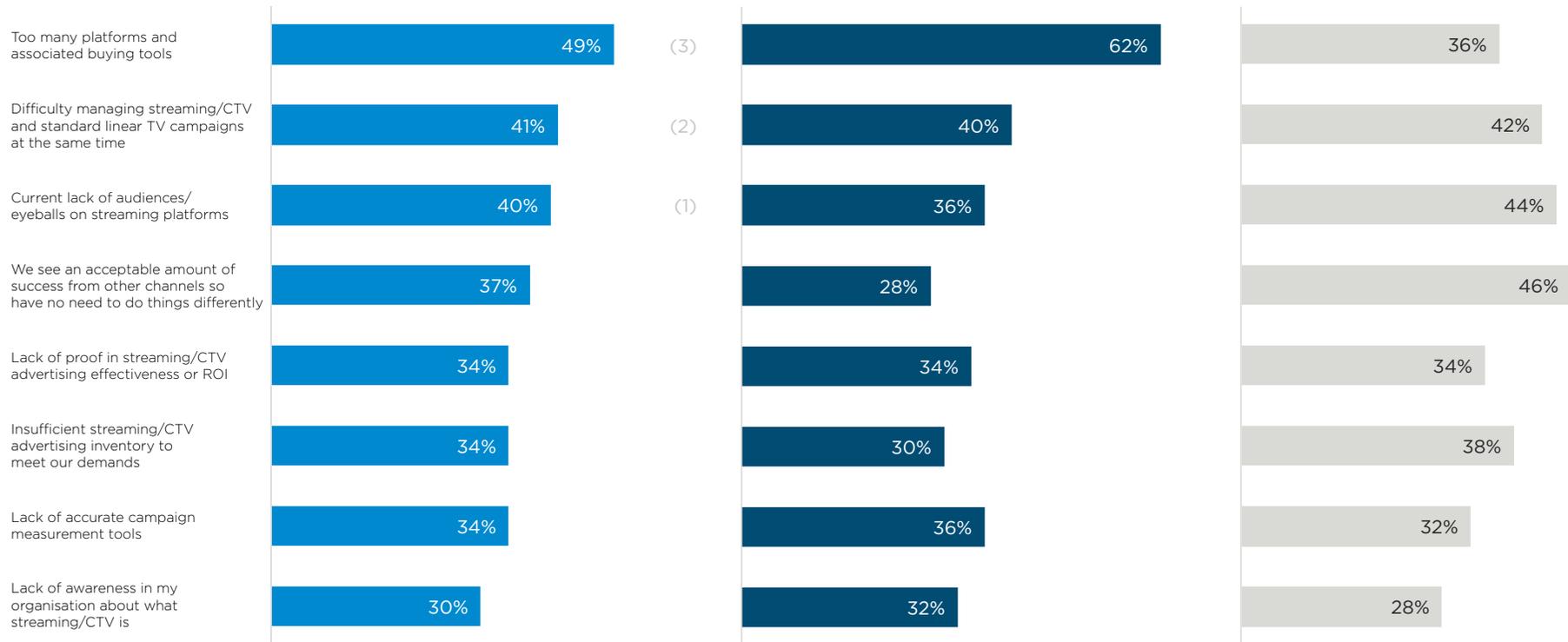
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Inhibitors of streaming TV spend

France

Advanced TV to streaming/CTV

(% 1 to 3)



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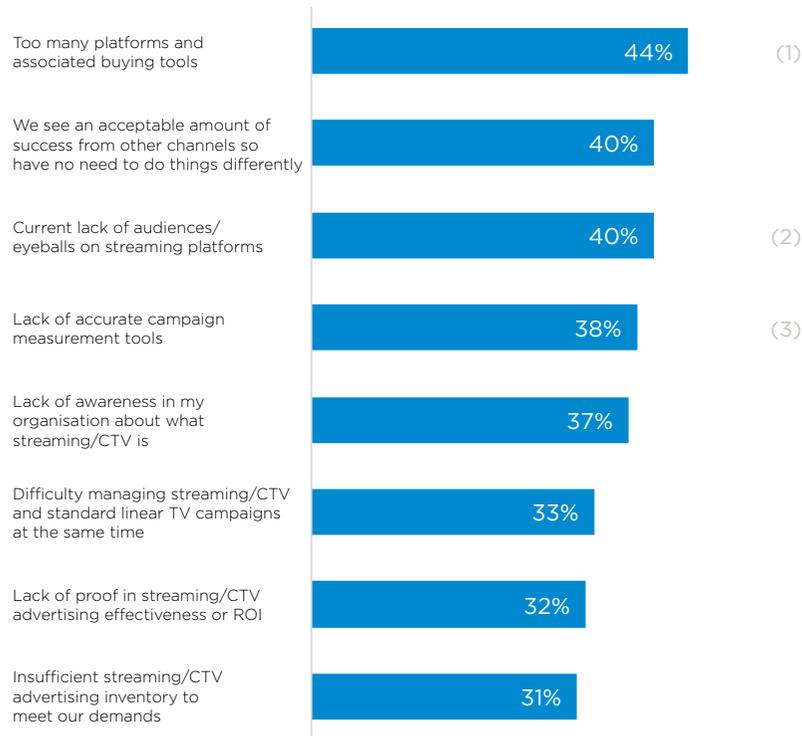
() indicates last year position

Inhibitors of streaming TV spend

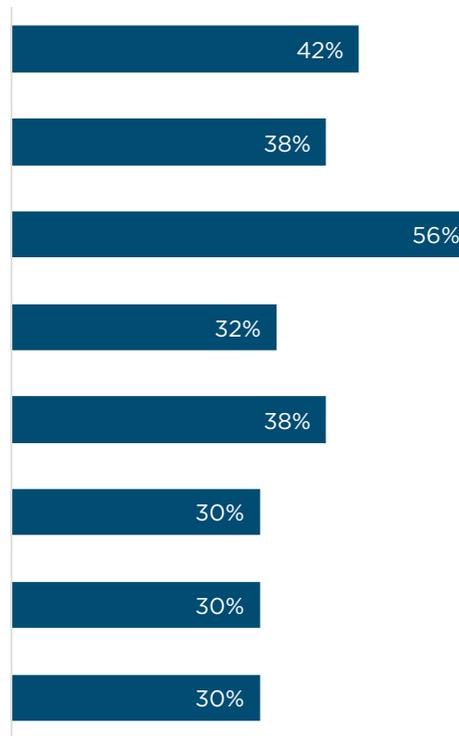
Germany

Advanced TV to streaming/CTV

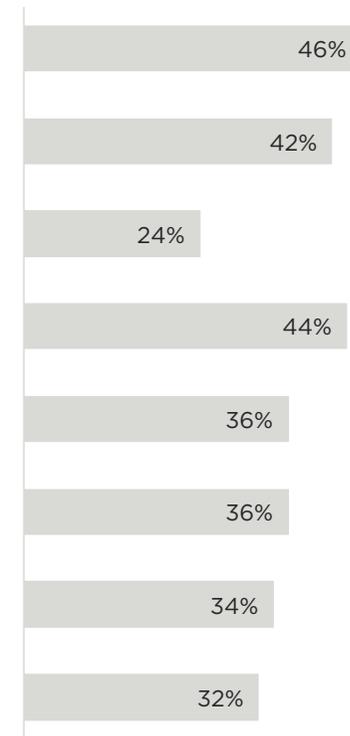
(% 1 to 3)



Advertisers



Agencies



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=100 Marketing Decision Makers & Influencers; July-August 2025
 Question: In your opinion what stops you from investing more of your budget in Advanced TV advertising?

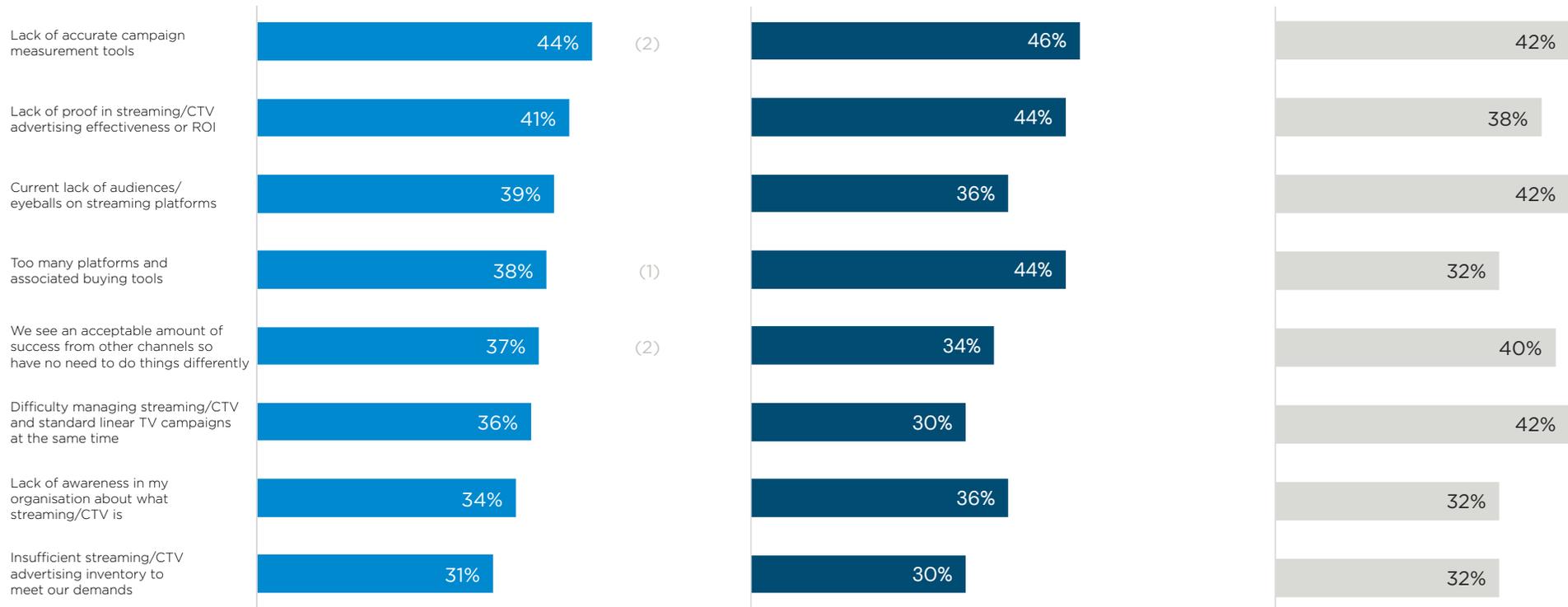
() indicates last year position

Inhibitors of streaming TV spend

Spain

Advanced TV to streaming/CTV

(% 1 to 3)



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=100 Marketing Decision Makers & Influencers; July-August 2025
 Question: In your opinion what stops you from investing more of your budget in Advanced TV advertising?

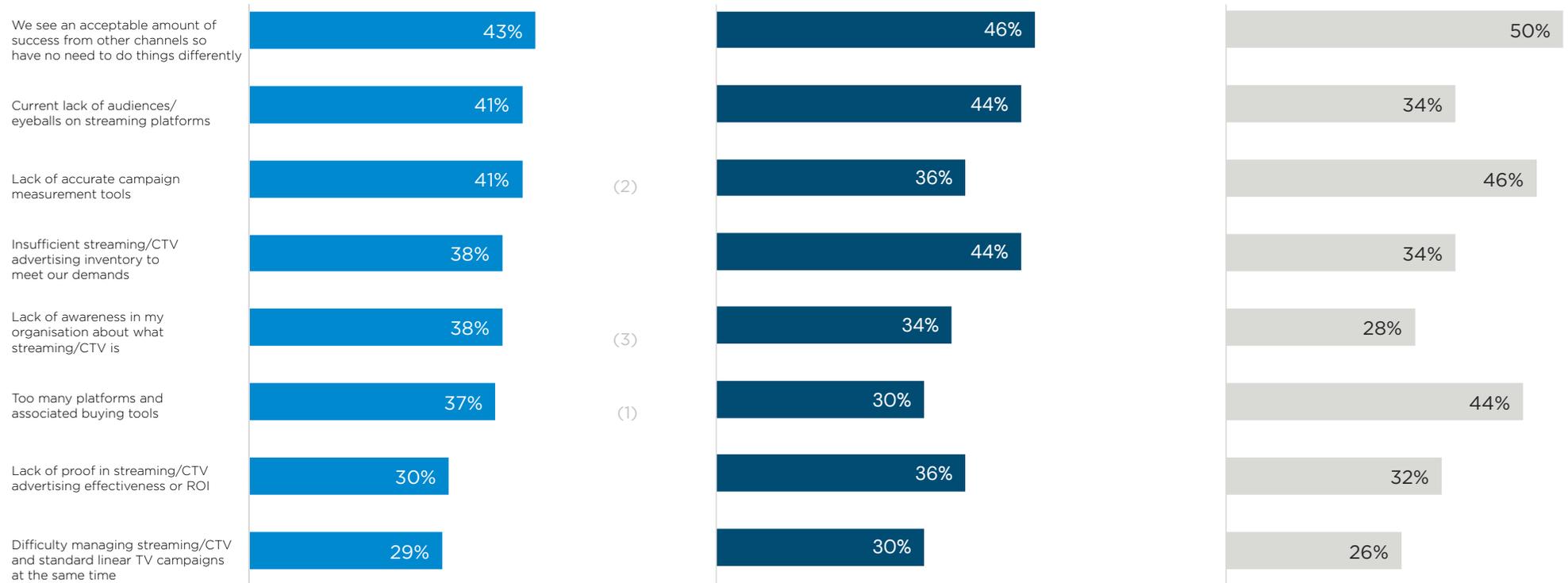
() indicates last year position

Inhibitors of streaming TV spend

Italy

Advanced TV to streaming/CTV

(% 1 to 3)



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=100 Marketing Decision Makers & Influencers; July-August 2025
 Question: In your opinion what stops you from investing more of your budget in Advanced TV advertising?

() indicates last year position

Annex - Country Specific Data

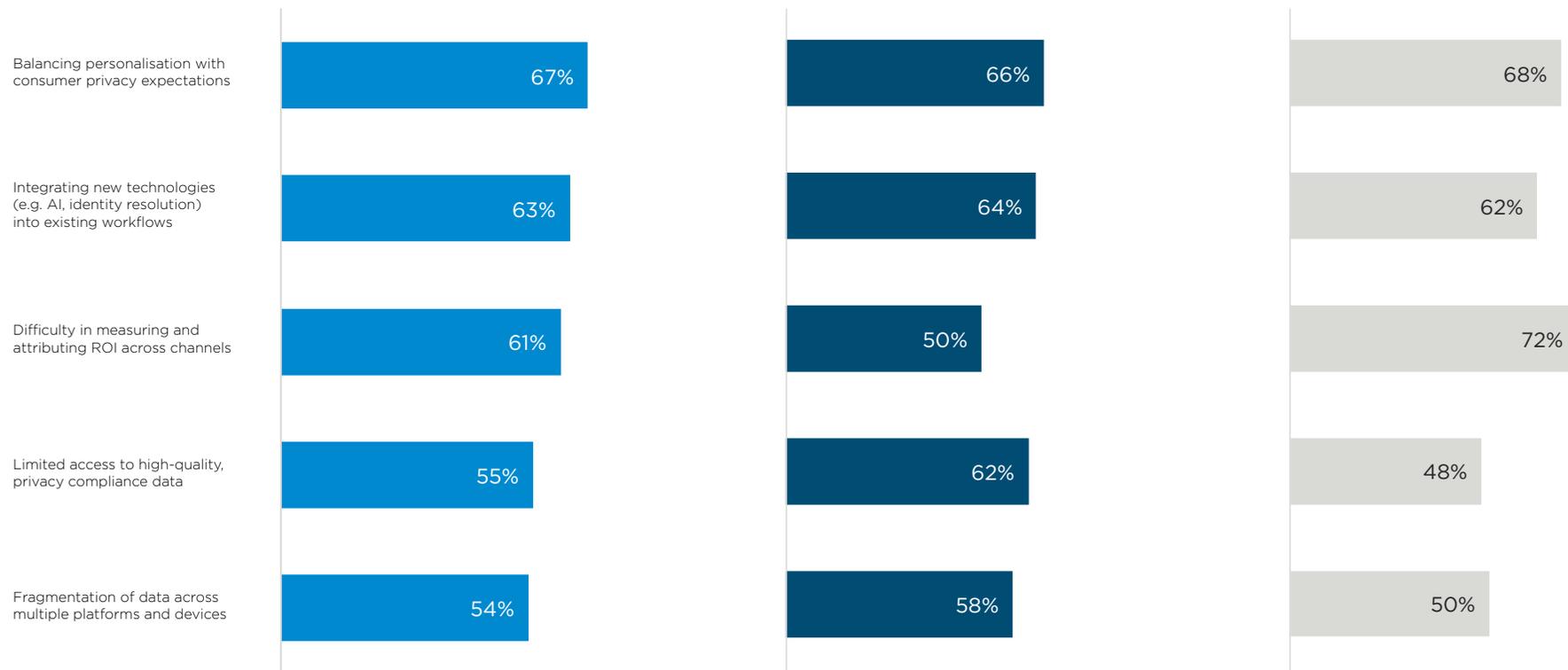
Data Challenges

Data challenges

UK

Challenges in leveraging TV and video data

(% ranked 1 to 3)



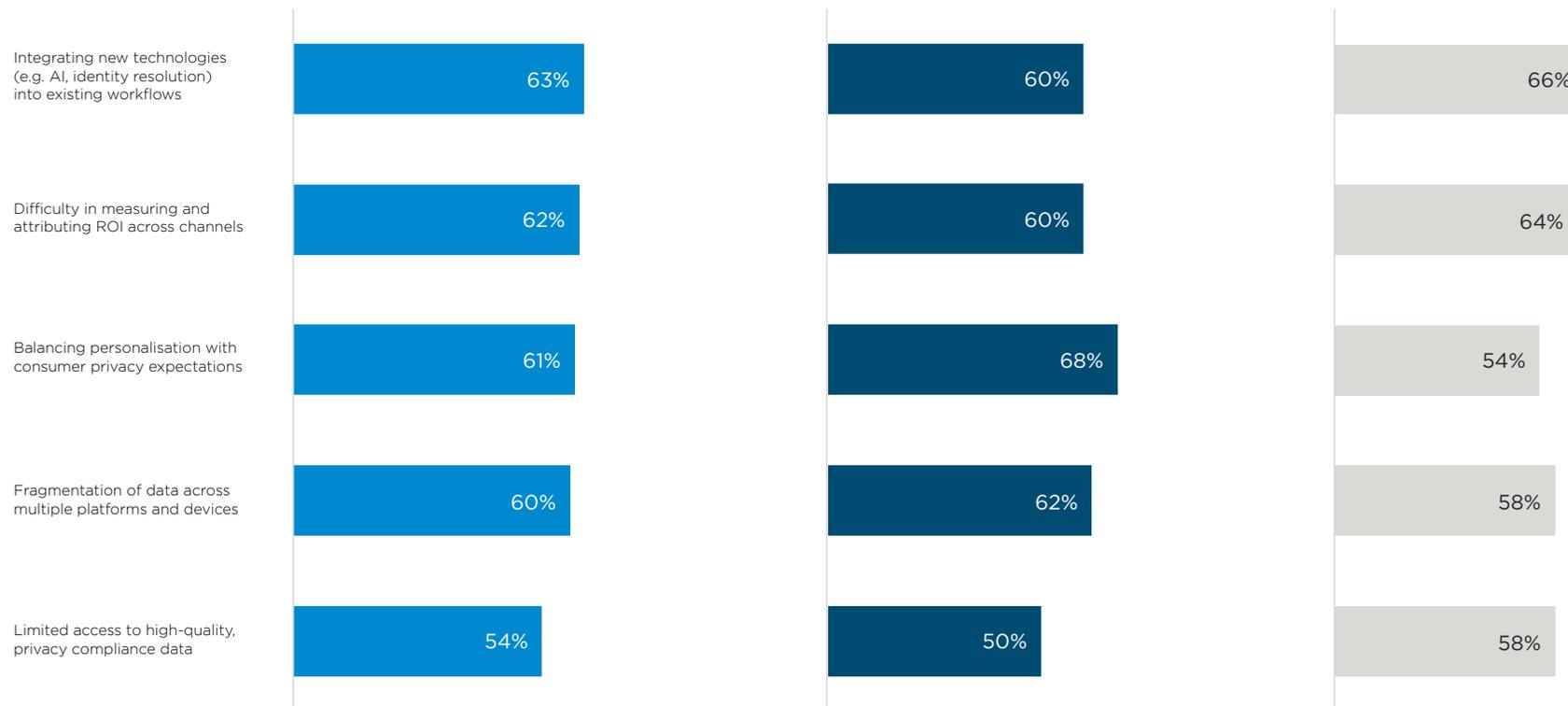
Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=100 Marketing Decision Makers & Influencers; July-August 2025
Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

Data challenges

France

Challenges in leveraging TV and video data

(% ranked 1 to 3)



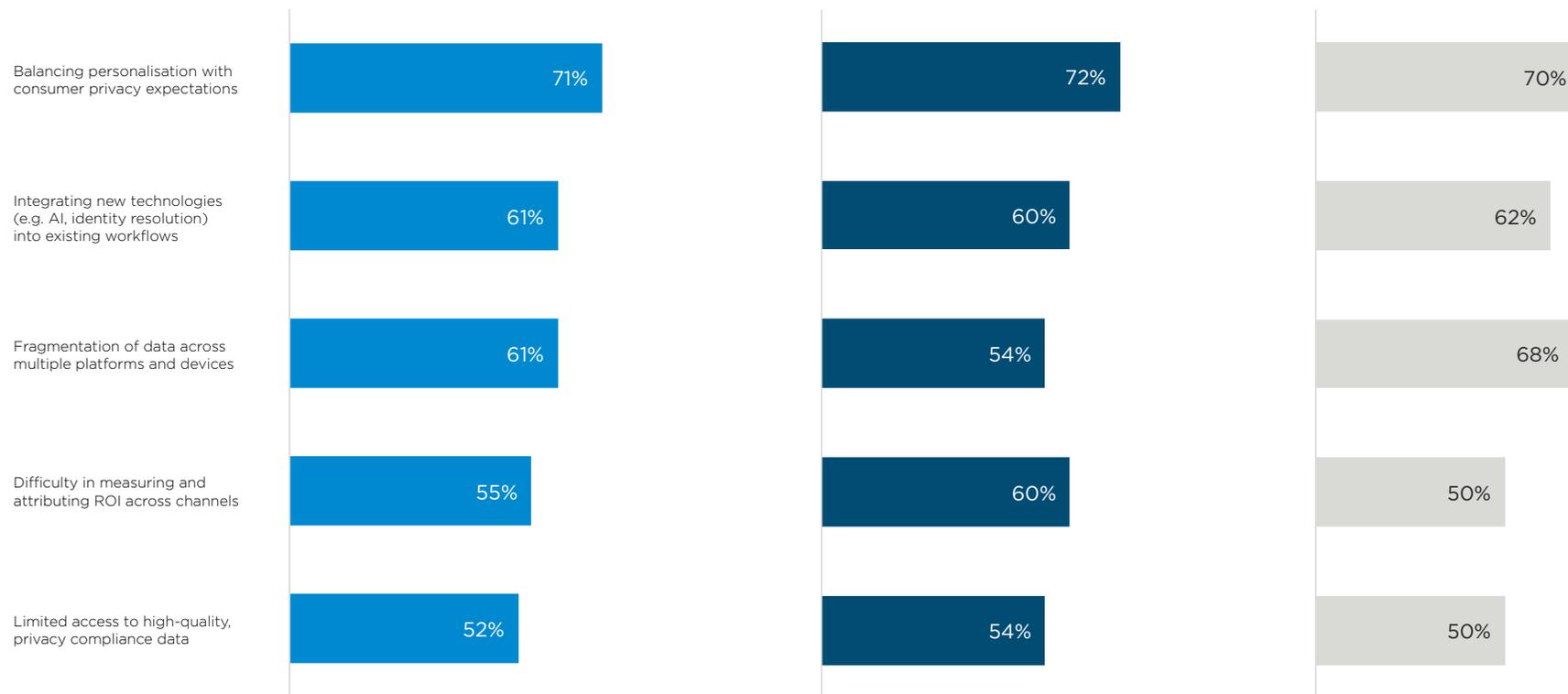
Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=100 Marketing Decision Makers & Influencers; July-August 2025
Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

Data challenges

Germany

Challenges in leveraging TV and video data

(% ranked 1 to 3)



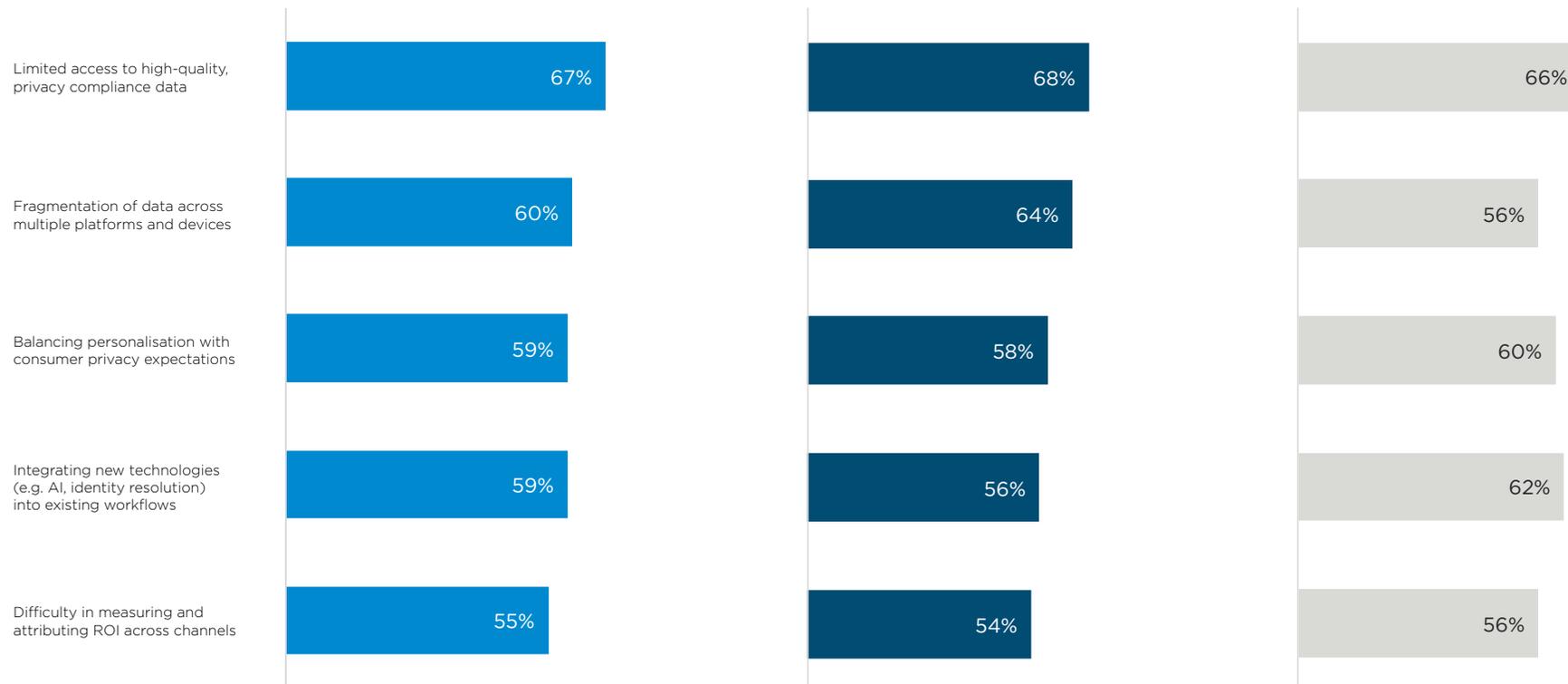
Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
 n=100 Marketing Decision Makers & Influencers; July-August 2025
 Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

Data challenges

Spain

Challenges in leveraging TV and video data

(% ranked 1 to 3)



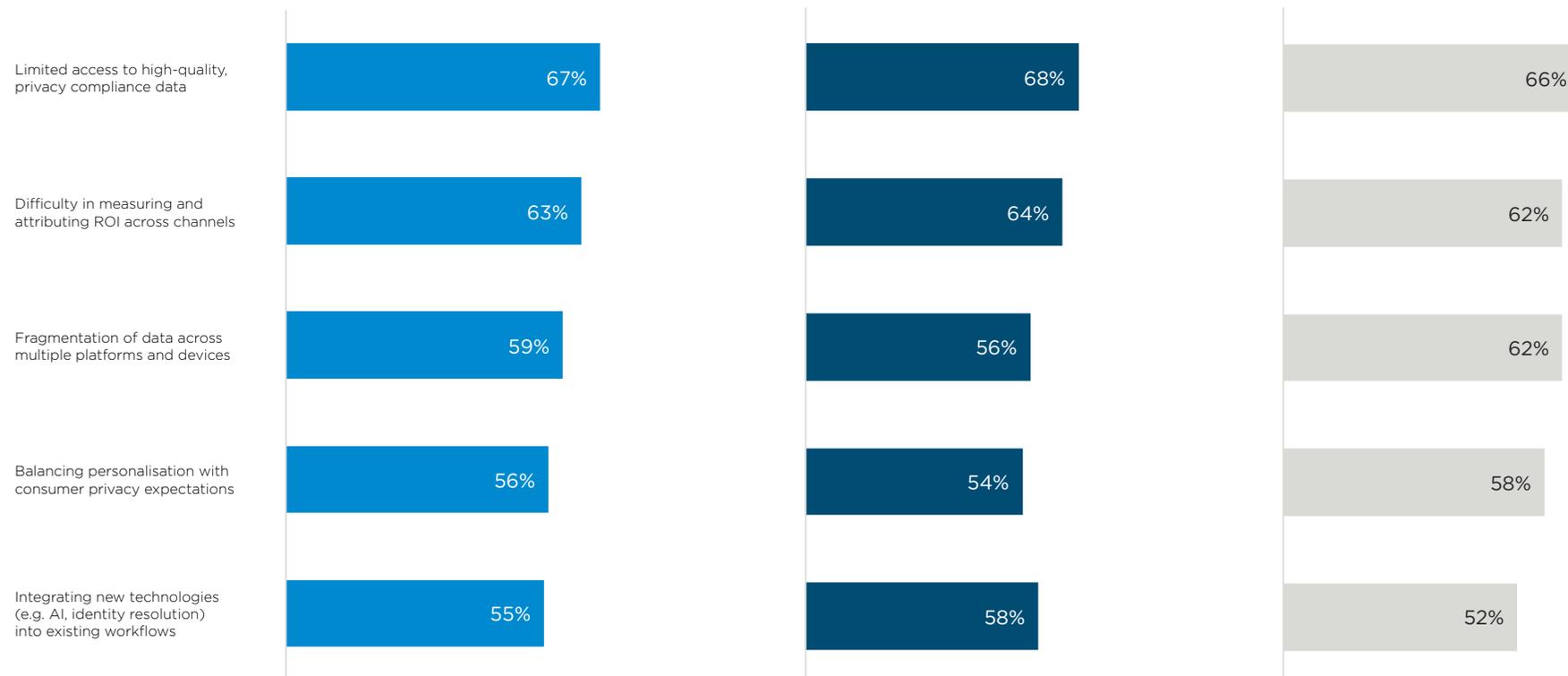
Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=100 Marketing Decision Makers & Influencers; July-August 2025
Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

Data challenges

Italy

Challenges in leveraging TV and video data

(% ranked 1 to 3)



Source: Comcast Advertising and Longterm Colab - Streaming TV Uncovered 2025
n=100 Marketing Decision Makers & Influencers; July-August 2025
Question: What is your biggest challenge when leveraging data to drive business outcomes in the evolving TV and video advertising landscape?

Author

This study was conducted by an independent media research firm, Longterm Colab, between July and August 2025. This is the sixth iteration of the survey which began in 2020.

The research, commissioned by Comcast Advertising, attempts to understand how marketers – advertisers and agencies – across five European countries are adapting to the current market forces, how they are adjusting spending priorities, and how they are preparing for the year ahead.



Emmanuel Josserand

Senior Director of Brand,
Agency and Industry Relations

Emmanuel leads strategic engagement across the premium TV ecosystem. An advocate for data-driven storytelling, he uses insights to surface trends, inform strategy, and shape narratives that resonate across international markets.

He plays a key role in translating complex data into actionable intelligence, helping stakeholders understand the evolving media landscape and ultimately, make informed decisions.

