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STREAMING TV UNCOVERED

EUROPEAN MARKETERS' SURVEY 2027

INTRODUCTION

Streaming TV has entered a new phase of maturity

The European television and video advertising landscape has entered a new phase of maturity. Streaming TV is no longer an emerging channel competing for attention and experimentation budgets; **it is now an established part of marketers' media plans across Europe.**

As audiences continue to shift across linear television, broadcaster video-on-demand (BVOD), subscription streaming services, FAST channels and social video platforms, marketers face a more complex, fragmented, but also more opportunity-rich video ecosystem than ever before.

Based on a survey of 500 marketers across France, Germany, Italy, Spain and the UK, the research builds on six years of tracking to examine how investments are changing, what underpins marketers' confidence in streaming TV and premium video, the drivers of growth, barriers to adoption and evolving measurement expectations.

500
marketers surveyed

5
European markets

6
years of tracking



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KEY TAKEAWAYS

Five things every marketer should know in 2027

01

Streaming TV remains the fastest-growing video advertising channel

55% of marketers expect to increase spend on streaming TV over the next 12 months – more than any other video channel, including social video and linear TV. Growth is consistent across all five markets.

02

Marketers are under pressure to deliver growth in a cautious economy

Growing revenue and market share is now the #1 objective, yet most marketers expect budgets to stay flat. Media investments must prove effectiveness, efficiency and measurable business outcomes.

03

Reach is both the biggest opportunity and the biggest barrier

Audience reach is the leading reason to invest in streaming TV – and, the main constraint. Marketers value engaged audiences in premium environments, but struggle with fragmented inventory and scale.

04

Measurement and proof of effectiveness remain critical challenges

Fragmented data, multiple measurement systems, identity challenges and platform complexity make planning and evaluation difficult. Marketers want simpler, more transparent, interoperable solutions.

05

Premium video is defined by quality, attention and outcomes

Premium is less about brand safety and more about the viewing experience, audience attention, professionally produced content and the ability to drive business results.

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METHODOLOGY

500 marketing decision makers across five European markets

500

respondents

Surveys completed by marketers in the UK, France, Germany, Italy and Spain.
Conducted in July/August 2026.

50/50

advertisers/agencies

All respondents were qualified as marketing decision makers or influencers.

43 · 41 · 16

% global · local · mixed

Responsibility for marketing budgets.

UK | France | Germany | Italy | Spain

n=100 per market

Definitions Streaming TV = all forms of premium TV content delivered via an internet connection, including scheduled, live and on-demand TV from AVOD, BVOD, FAST or Hybrid VOD (HVOD – paid subscription with ads), e.g. TF1+, ITVX, Channel 4, Pluto TV, Vevo, Max, Amazon Prime, Netflix. Streaming TV excludes YouTube and other short-form social video platforms.
Social and online video platforms include YouTube, TikTok, Snap, Meta...

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01

WHAT ARE MARKETERS' 2027

Budget spend expectations and marketing priorities?

Budget outlook · Economic context · Advertisers vs. agencies · Industry sectors
Marketing objectives · Strategic priorities · Sustainability

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BUDGETS & PRIORITIES

Marketing budget expectations remain largely flat

52%

of European marketers expect their overall budget to stay the same.

Macro headwinds

Global tensions and local political and economic uncertainty continue to weigh on growth prospects.

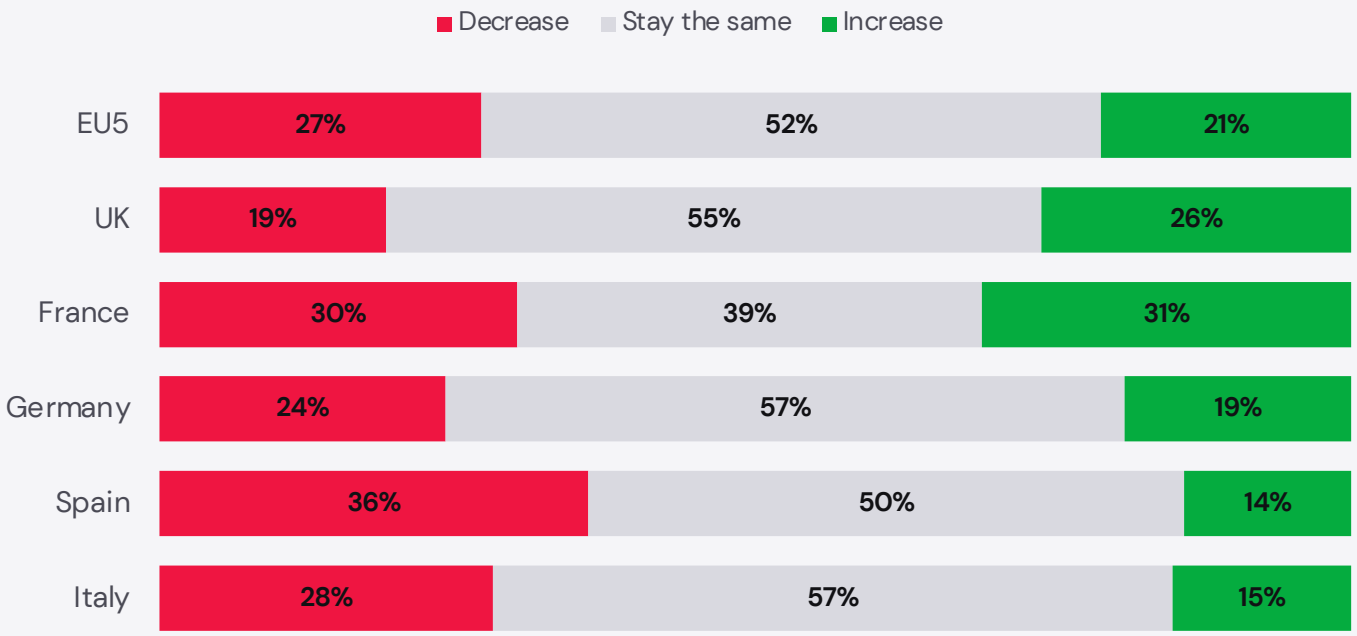
Budgets on par with last year

The 2027 outlook (-6%) is consistent with 2026, when net budget growth stood at -4%.

UK & France: cautious pragmatism

The most positive markets still see opportunities, but take a measured approach to stimulate subdued consumer spending.

Expected change in marketing budgets, next 12 months
% of marketers

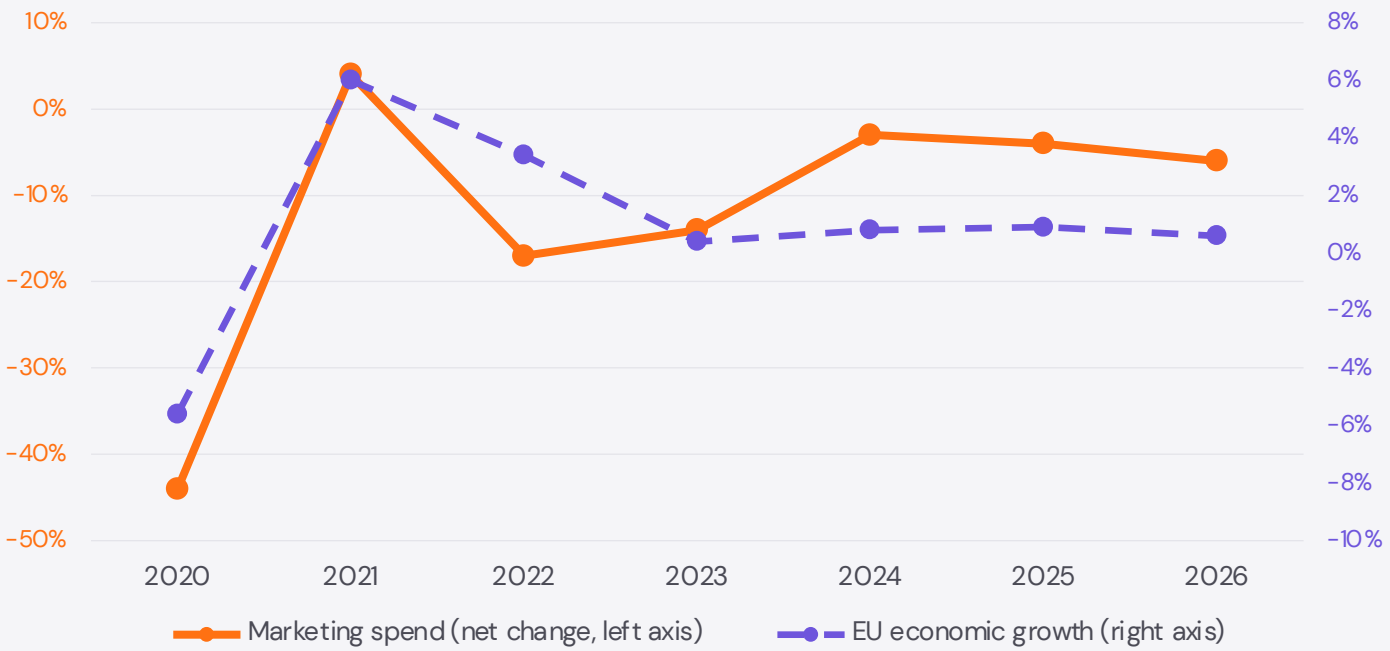


Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How do you expect your overall marketing budgets to change over the next 12 months?

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Marketing budgets are aligned to the economic trend

Net change in marketing spend vs. EU economic growth
Net change = % increase minus % decrease



When the economy grows, marketing budgets follow.

Budgets track the economy
More investment when the economy grows, more caution when prospects weaken.

Advertisers & agencies aligned
Agencies are just slightly more pessimistic.

With little expectation of budget growth, marketers must make existing investment work harder – and prove where it delivers the greatest return.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026, Trading Economics, Euro area, GDP growth rate
Question: How do you expect your overall marketing budgets to change over the next 12 months?

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Agencies and advertisers are relatively aligned on budgets

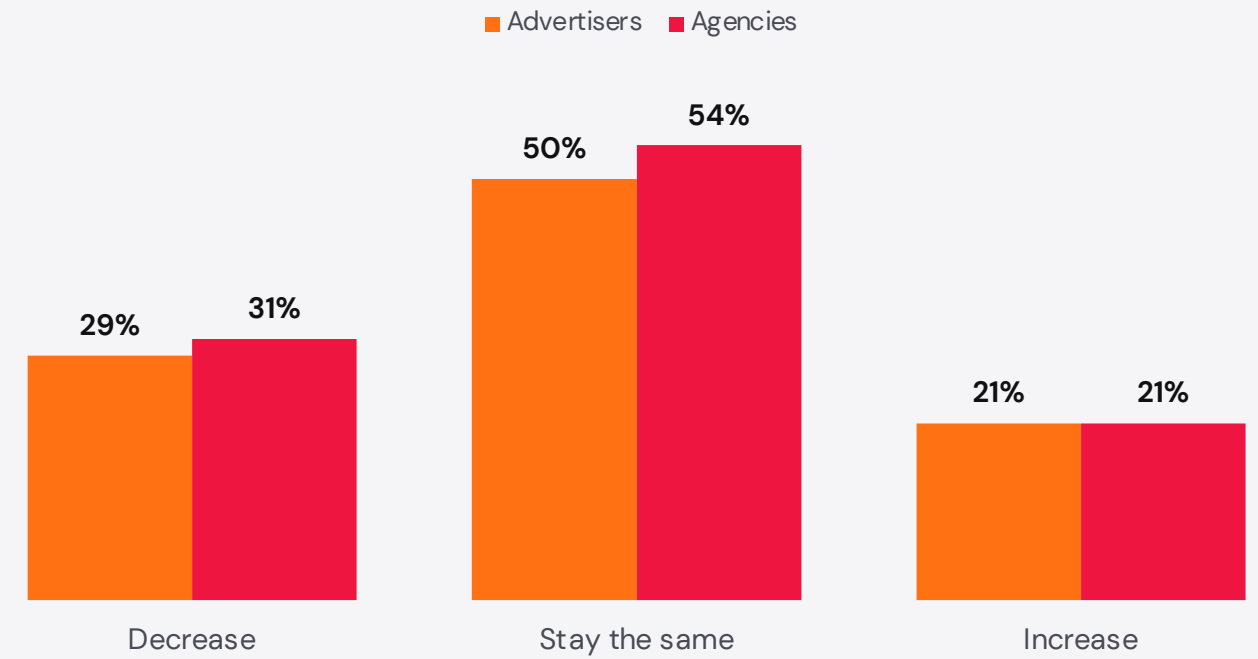
Net change in marketing spend (% increase minus % decrease)

-8
Advertisers
net budget change

-10
Agencies
net budget change

Agencies are slightly more pessimistic than advertisers.

How do you expect your overall marketing budgets to change?
% of marketers, next 12 months



Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How do you expect your overall marketing budgets to change over the next 12 months?

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Marketing budget expectations vary between industry sectors

Clothing and retail brands lead next year outlook; medical and finance brace for tough conditions.

Retail & clothing push ahead

Stronger intentions to compete for market share and win back customers in a crowded market.

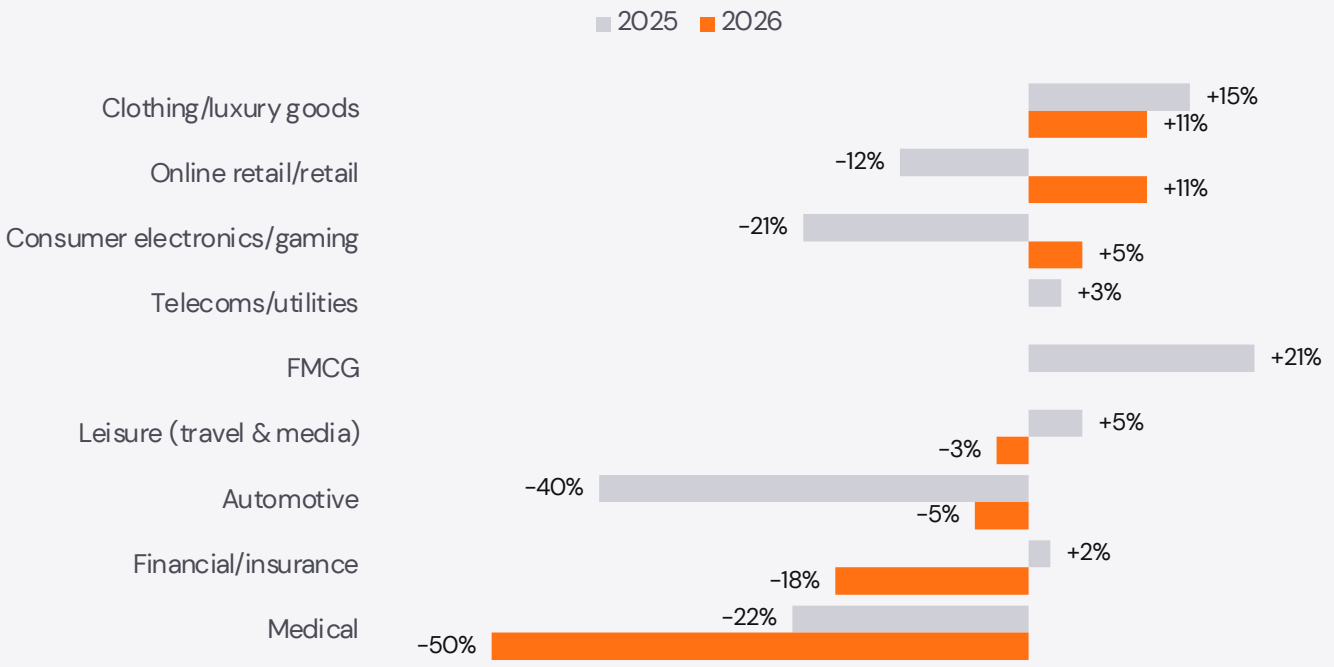
Telecoms, FMCG & leisure soften

Many sectors take a measured approach against subdued economic growth across Europe.

Medical & finance brace

Financial services and medical marketers expect difficult market conditions.

Net change in marketing spend by sector
% increase minus % decrease, sorted by 2026



Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How do you expect your overall marketing budgets to change over the next 12 months?

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SECTOR COMPARISON

Revenue growth unites most sectors; finance and autos focus on acquisition, clothing/luxury on retention

Top marketing objectives in the next 12 months (% ranking 1 to 3), by sector

	Finance	Autos	FMCG	Clothing/ luxury	Consumer electr.	Medical	Telecoms & utilities	Retail/online	Leisure/ media
Retaining customers/loyalty	54%	48%	50%	**65%**	53%	38%	52%	45%	**58%**
Acquiring/winning back customers	**65%**	**62%**	29%	62%	58%	46%	48%	60%	50%
Building brand health	48%	48%	**64%**	53%	42%	**63%**	54%	46%	54%
Leveraging customer data	37%	52%	39%	32%	21%	46%	37%	35%	36%
Growing revenue/market share	59%	43%	61%	53%	**74%**	58%	**65%**	**61%**	**58%**
Growing ROI/profitability	37%	43%	57%	35%	42%	50%	42%	48%	42%

74% of consumer electronics marketers put revenue growth first – the highest score of any sector

64% of FMCG marketers prioritise brand health, ahead of revenue growth

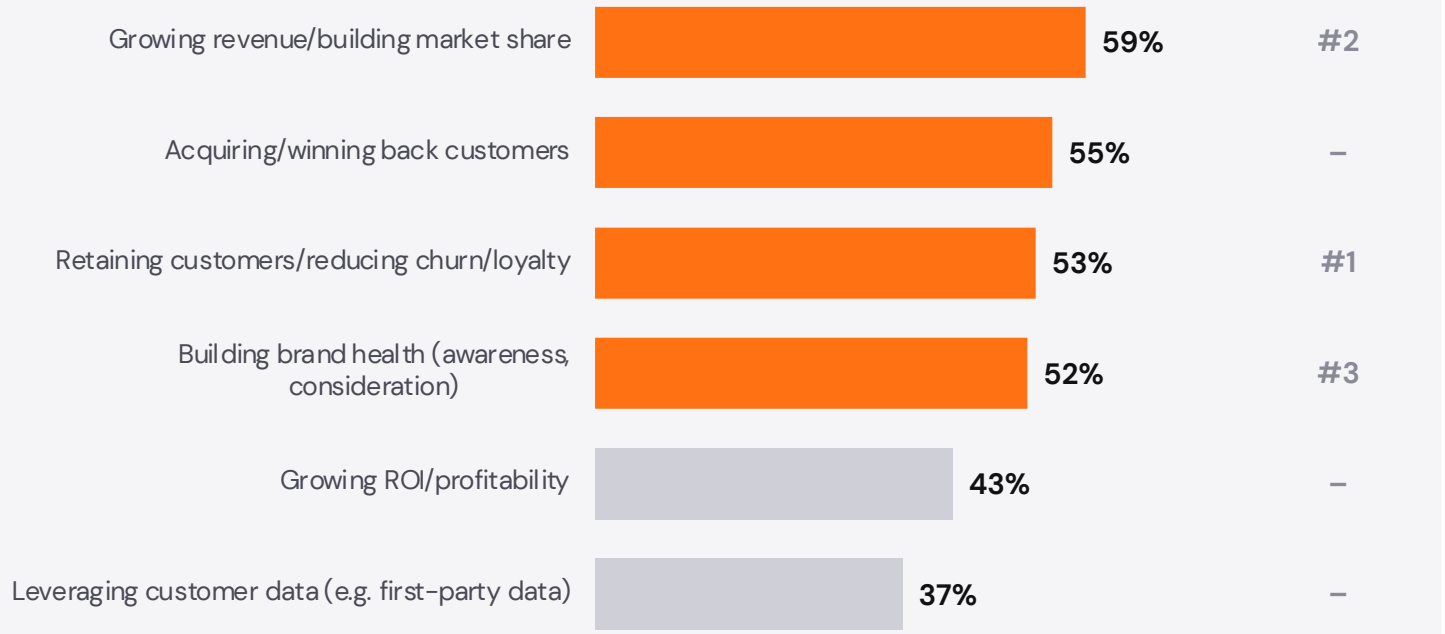
65% of clothing/luxury marketers focus on retention and loyalty

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
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)

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Growing revenue becomes the top marketing priority

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



Revenue growth moves to #1, while long-term brand and loyalty goals stay firmly on the agenda.

Growth takes the lead
Revenue and market share move to #1 (from #2); acquisition overtakes retention.

Long term still matters
Retention stays in the top 3; brand health matters to more than half of marketers.

Consistent with industry trends
Gartner and Adobe also rank revenue and acquisition as top 2027 priorities.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
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)
See p46 for country-specific data.

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BUDGETS & PRIORITIES

AI is marketers' key strategic priority

Gen AI stays #1

Still the defining technology priority, driven by agencies (41%) more than advertisers (33%).

From adoption to outcomes

As AI goes mainstream, measuring effectiveness becomes key to prove the return on technology investments.

Sustainability holds firm

A major divide: #2 priority for agencies (32%) vs. 24% for advertisers, below attention (30%).

Top 3 strategy priorities in the next 12 months (% ranking 1 to 3)

#1

37%

Harnessing the benefits of generative AI

#2

32%

Using automated ad tech to buy and optimise

#3

29%

Investing in campaign effectiveness measurement

ISBA and DMA research point to a market moving from AI experimentation to AI optimisation: success will be judged by how effectively organisations turn that investment into competitive advantage and measurable growth.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: Which of the following are your key media strategy priorities for the year ahead?

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The environment still holds firm as a major priority

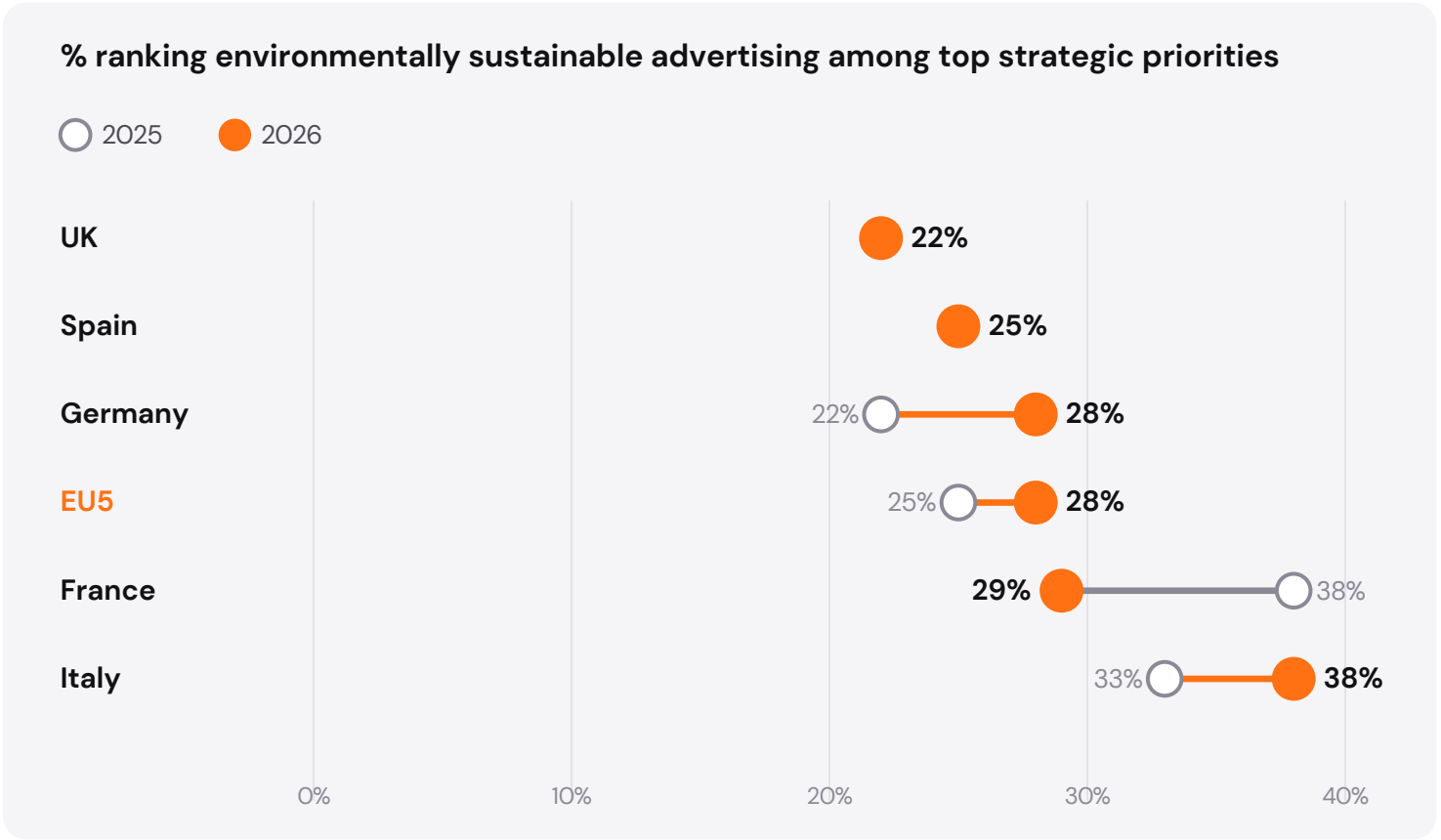
28% of EU5 marketers rank sustainable advertising among their top strategic priorities, up from 25%.

Still a top priority

Sustainable advertising sits just behind AI, automation and effectiveness measurement.

Innovation vs. impact

Data-intensive AI creates tension: environmental impact must be weighed alongside performance and efficiency, so progress in one area doesn't cost the other.



Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: What would you say are your key areas of priorities for the year ahead when it comes to media strategy?

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02

WHAT ARE MARKETERS' NEXT-YEAR PLANS FOR

Streaming TV/CTV investments?

Budget mix by market · Spend intentions by platform · Advertisers vs agencies
Perceived effectiveness by platform and by country

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STREAMING TV INVESTMENTS

Marketers are adopting multichannel investment strategies

Share of TV & video advertising budget

% of annual TV and video budget, by market



28%

+10 pts vs 2025

Social/online video share of TV & video budgets

35%

+16 pts vs 2025

Social/online video share in Germany

Diverse European ecosystem

Germany goes heavy on social/online video, Italy still invested in linear TV, France leads on FAST/AVOD and Spain leaning on subscription streaming.

Diversity, not replacement

Social/online video has strengthened significantly but so has the other platforms, reflecting not a replacement, but a diversification across the video ecosystem.

A multichannel future

Marketers are increasingly embracing a multichannel strategy that combine the scale and quality of TV with the reach and flexibility of digital video environments.

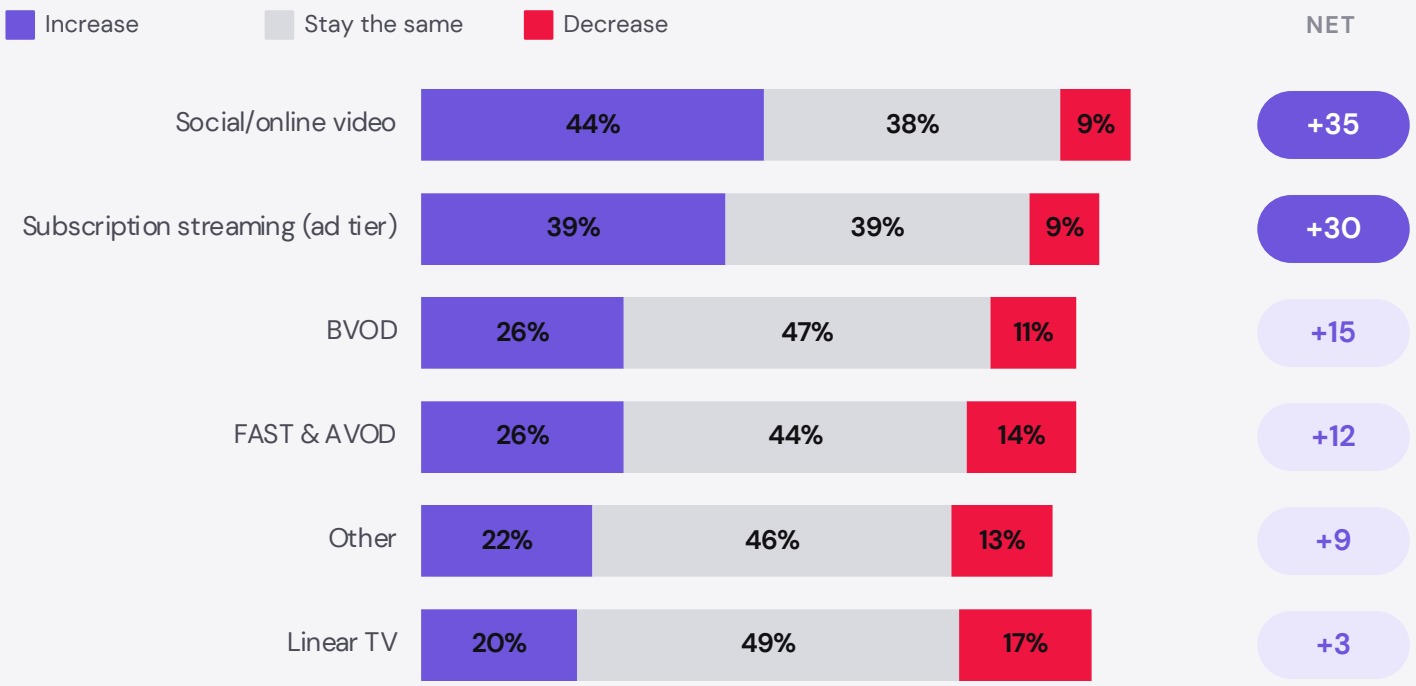
Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

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STREAMING TV INVESTMENTS

Marketers expect to increase spend across all video platforms, led by social/online video and HVOD

Spend intentions by platform, next 12 months
% of marketers



No single platform can deliver every objective: the future is a gradual rebalancing, not a replacement.

A diversified mix

Effective reach still depends on a diversified mix of video environments working together.

Plan holistically

Understand how each environment contributes across the consumer journey.

Effective strategies remain flexible

Shifting investments towards emerging opportunities while keeping the proven strengths of established channels.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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STREAMING TV INVESTMENTS

Agencies more bullish than advertisers on streaming TV

Streaming TV

% expecting a spend increase, next 12 months

54% Advertisers

57% Agencies

Social video

% expecting a spend increase, next 12 months

40% Advertisers

49% Agencies

Linear TV

% expecting a spend increase, next 12 months

18% Advertisers

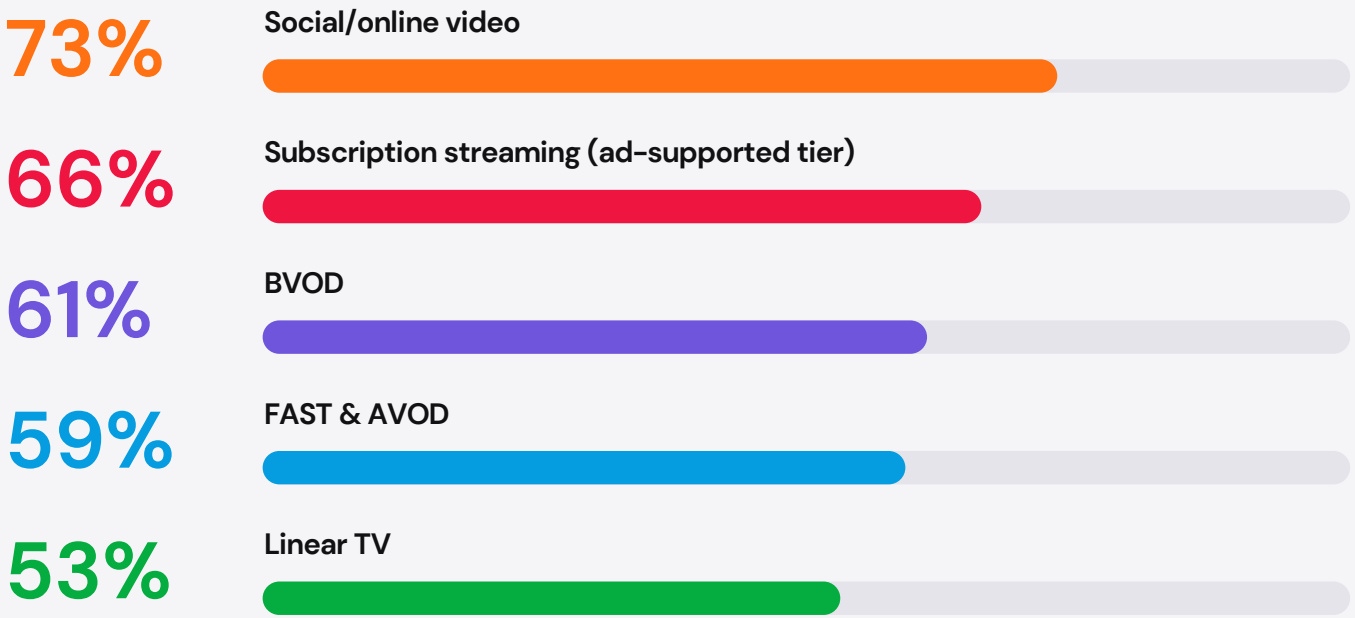
22% Agencies

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How do you expect your organization' spending on each of the following types of television and video to change over the next 12 months?

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Social and online video leads marketers' perceptions of TV and video effectiveness

Perceived ad effectiveness by platform
% very/somewhat effective



Scale, targeting, measurement and flexible formats make social video highly attractive.

Built for brand & performance

Audience scale, precise targeting, measurement capabilities and flexible creative formats.

Part of an integrated ecosystem

Effectiveness is about understanding the complementary role of social video alongside streaming, BVOD and linear TV – part of a broader video strategy.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How effective is advertising on each of the following types of television and video at delivering the objectives that matter most to your organisation?
See p54 for country-specific data.

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STREAMING TV INVESTMENTS

Streaming TV effectiveness is high across Europe

Streaming TV perceived as very/somewhat effective, by country

87%	86%	81%	77%	78%
UK	France	Germany	Spain	Italy

By marketer type

79%	84%
Advertisers	Agencies

Performance and effectiveness have become the ultimate test of every media investment — budgets increasingly flow to channels that can prove they drive real business outcomes, not just exposure.

Streaming TV is widely perceived as delivering on this front, combining the premium, engaged environment of television with advanced targeting and measurable results, allowing brands to reach valuable audiences while demonstrating return on investment.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: How effective is advertising on each of the following types of television and video at delivering the objectives that matter most to your organisation?

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03

WHAT ARE MARKETERS' KEY

Drivers and inhibitors of streaming TV investments?

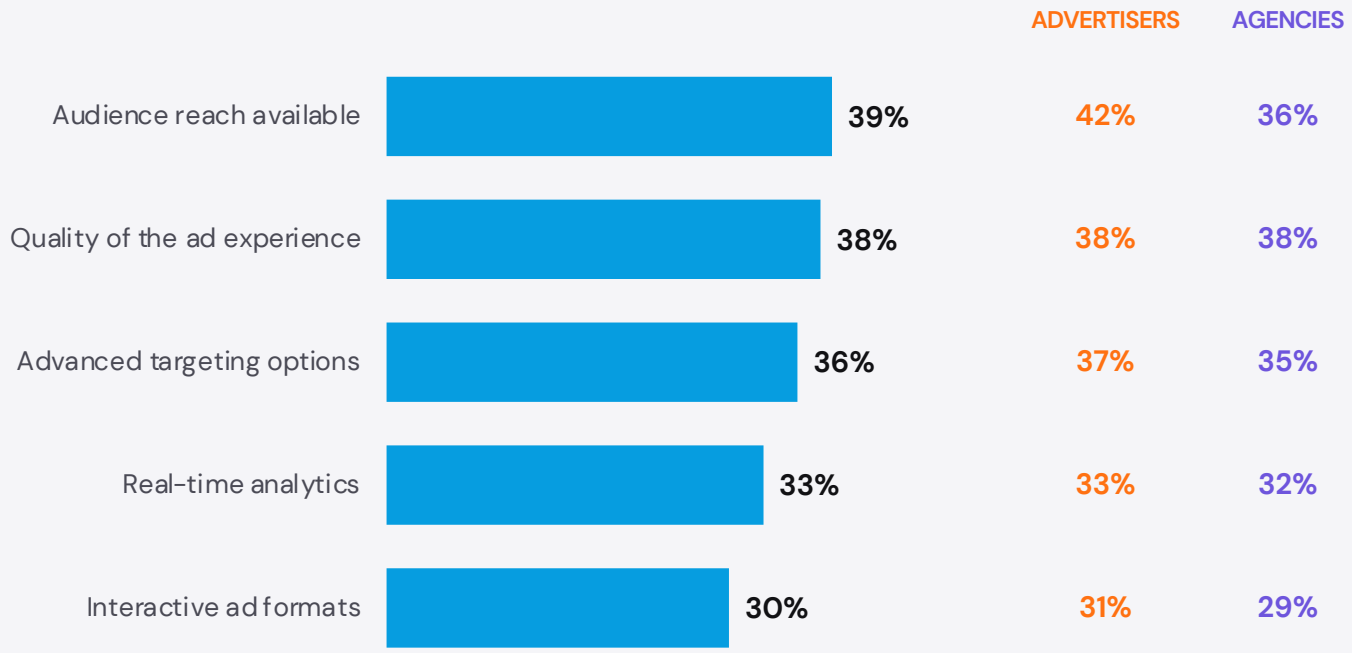
Growth drivers · Investment barriers · Proof of effectiveness · Premium video
Measurement trust · CPM as a common currency · Curation

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Audience reach remains critical – and so does the ad experience

Drivers of streaming/CTV spend growth

% ranking each factor among their top three drivers



Future growth will depend on delivering both scale and operational performance.

Reach comes first

#1 driver, narrowly ahead of ad experience quality and advanced targeting.

Different motivations

Advertisers want scale; agencies value optimisation tools and inventory availability.

AI-powered optimisation

KPI-driven optimisation tools are becoming a key enabler of further streaming TV investment for agencies.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: With traditional 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?

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DRIVERS & BARRIERS

Scale and complexity hold back streaming TV investments

Limited audience reach is still the #1 barrier to greater investment.

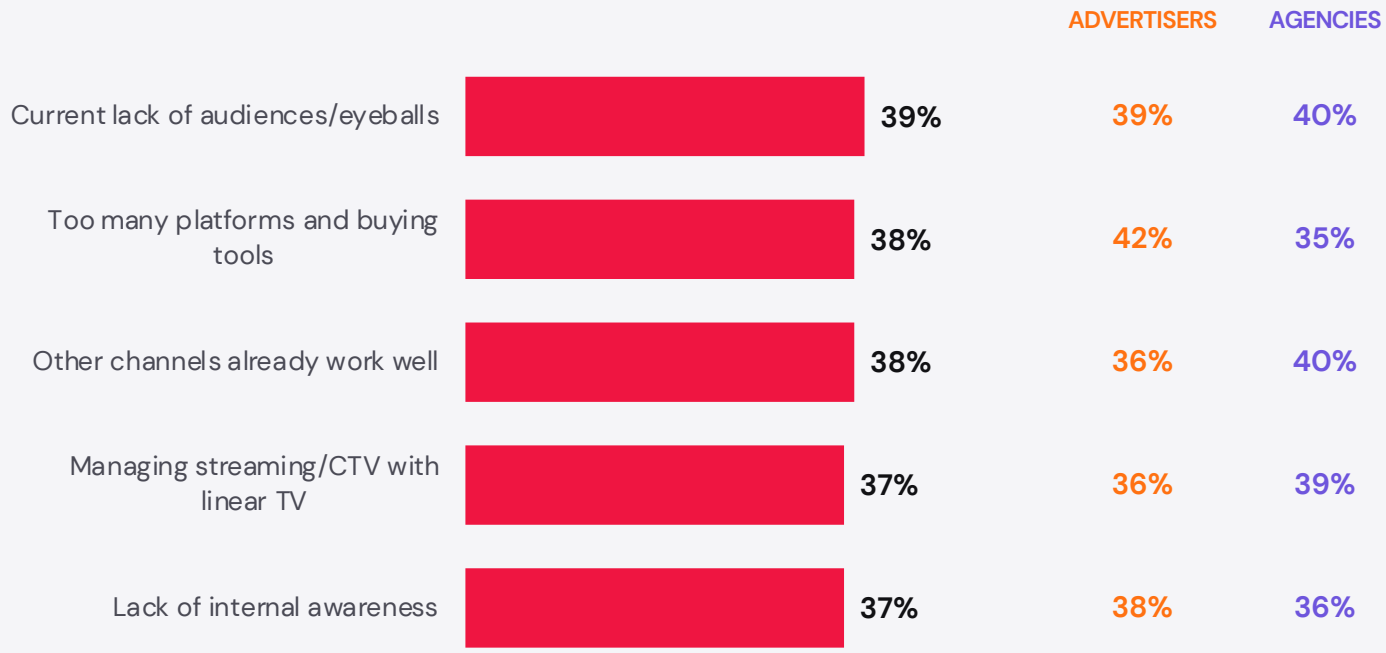
Fragmentation & complexity

Growth depends on making audiences easier to reach and activation simpler across a complex ecosystem.

Advertisers feel it most

42% of advertisers cite too many platforms and buying tools (vs. 35% of agencies), which hits confidence in planning and budget allocation.

Barriers to streaming/CTV investment
% ranking each factor among their top barriers



Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: What limits your investments in Streaming/CTV advertising?
Full results in appendix, p. 41.

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DRIVERS & BARRIERS

Proof of effectiveness remains a barrier to further streaming TV investment

% citing a lack of evidence as a barrier to streaming TV investment

All marketers

37%

in 2026

+4 pts

vs. 33% in 2025

Advertisers

38%

in 2026

+6 pts

vs. 32% in 2025

Agencies

36%

in 2026

+2 pts

vs. 34% in 2025

Pressure for effectiveness proof is increasing – especially among those who hold the budget.

More than 1 in 3
37% say a lack of evidence constrains investment (33% in 2025).

Advertisers most concerned
Up from 32% to 38%; agencies from 34% to 36%.

Proof unlocks growth
Stronger measurement and clearer impact on business outcomes will be key.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: In your opinion what stops you investing more of your budget in Advanced TV advertising? [Lack of awareness in what Streaming/CTV is]

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Quality, attention and content define premium video

Premium is defined first and foremost by the quality of the content and experience it delivers.

Experience first
A high-quality viewing and ad experience leads, followed by attention and engagement.

More than reach or safety
Premium means ads are seen, engaged with and have an impact – backed by transparency and credible measurement.

Different lenses
Advertisers stress transparent supply paths; agencies, trusted brand-safe environments. Clear differences also lie between regions.

70%

Advertisers **69%**
Agencies **72%**

Content/ad experience
Professionally produced, high-quality content; trusted and brand-safe environment; high-quality viewing/ad experience

54%

Advertisers **54%**
Agencies **54%**

Audience/engagement
High levels of audience attention or engagement; scale or audience reach

50%

Advertisers **48%**
Agencies **51%**

Measurement/effectiveness
Credible and comparable audience measurement; evidence of advertising effectiveness or business outcomes

29%

Advertisers **32%**
Agencies **27%**

Transparency/supply
Transparent information about the source and supply path of inventory

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?
% selecting at least one attribute in each group.

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Trust in measurement varies across markets, reflecting different levels of confidence in measurement frameworks

Trust in measurement systems, EU5
% trust completely/somewhat

61%	**Platform-owned systems** e.g. YouTube, Meta, Amazon
57%	**Buyer-side/validation systems** Custom-built agency systems and/or third-party measurement providers
53%*	**Cross-platform industry systems**
53%*	**Industry-owned planning and benchmarking systems**

In France, industry-led measurement enjoys a clear advantage: 59% vs. 49% for platform-owned systems.

UK & France favour industry tools

UK: trust virtually on par (70% vs. 68%).
France: industry-led measurement leads (59% vs. 49%).

Consistency builds trust

Comparable metrics and consistency across measurement frameworks would help create a more trusted and actionable view of performance.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: In your opinion, which of the following types of measurement systems provide the most trusted Streaming/CTV campaign data?
* EU5 figure calculated as the average of the five equally weighted country samples (n=100 each).

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A common CPM could improve transparency and simplify planning across platforms

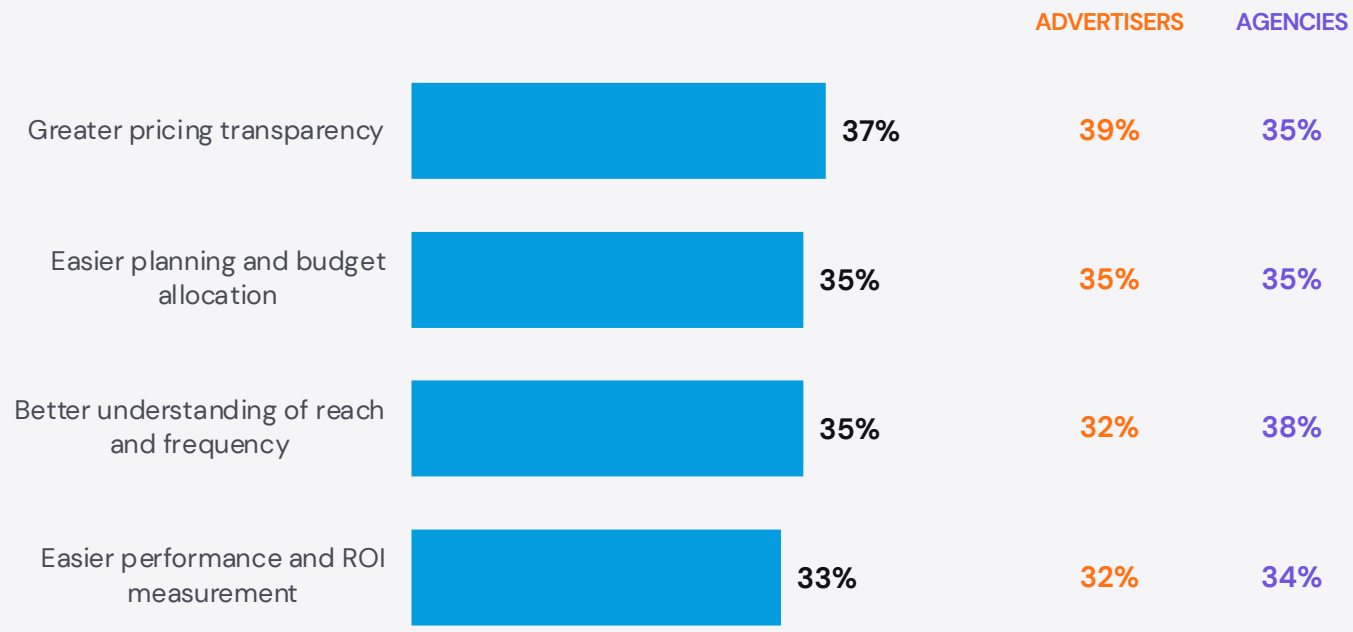
Pricing transparency is the standout benefit of CPM as a common currency.

CPM across linear and streaming
Improved transparency, simpler planning and consistent cross-platform comparisons.

Different expectations
Agencies: standardised audience valuation.
Advertisers: easier channel comparisons and activation

A common CPM framework could create a more consistent basis for comparing value and performance across the fragmented TV and video marketplace.

Benefits of using CPM as a common currency
% selecting each benefit



Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: Which, if any, would be the main benefits of using CPM as a common basis for planning and comparing television and video advertising across linear and streaming environments?

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DRIVERS & BARRIERS

Targeting and buying efficiency lead curation's perceived value

Areas where curation can add the greatest value (% selecting each)

31%

Improving audience targeting

30%

Improving pricing or buying efficiency

26%

Improving campaign performance or optimisation

Easier to navigate

Curation is gaining traction to simplify access to inventory, improve targeting and drive buying efficiency in fragmented streaming environments.

Broadly aligned

Advertisers and agencies agree – except on easier access to relevant inventory, valued far more by agencies.

DEFINITION

Curation is the process of aggregating, organising and packaging supply from multiple publishers into customised collections that media buyers can purchase and manage more efficiently.

Source: Comcast Advertising and Longterm Colab – Streaming TV Uncovered 2027 | n=500 Marketing Decision Makers & Influencers; July–August 2026
Question: Based on your understanding or experience, where, if anywhere, can curation add the greatest value to streaming or CTV advertising?

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CONCLUSION

A maturing market entering its next phase

This year's survey reveals a market that has moved beyond whether streaming TV belongs in the video mix, towards how its full potential can be realised. Marketers recognise streaming TV as an effective, premium and strategically important channel – while business growth puts every media investment under pressure to deliver measurable outcomes.

Future growth will not be driven by confidence alone. Marketers still face practical challenges around audience scale, platform fragmentation, measurement consistency and operational complexity. The next chapter depends less on building awareness of streaming TV's benefits and more on removing the barriers to broader adoption and investment.

Looking ahead, **the opportunity lies in making the ecosystem easier to navigate:** simplified buying, improved interoperability, greater pricing transparency, trusted cross-platform measurement and efficient access to audience scale.

The winning organisations that will capture the next wave of investments, to help marketers achieve their growth ambitions will be those able to combine:

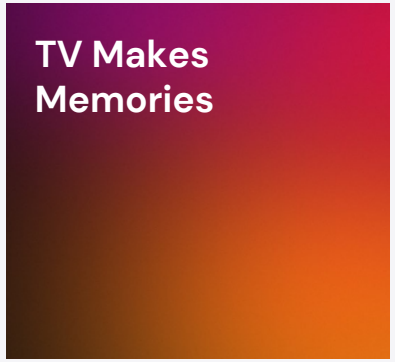
Premium content + Scalable reach + Trusted measurement + Seamless execution

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FOR MORE INSIGHTS

Keep exploring: research from Comcast Advertising and FreeWheel



How ads in a TV environment have a unique ability to create memories

Attention, connection and repetition let TV-environment ads build memories and engagement.

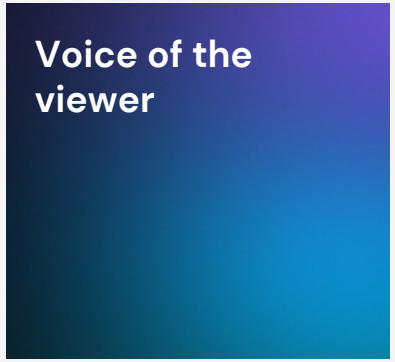
Download report →



How streaming captures viewer attention that drives performance

By holding focused attention, streaming TV helps brands build memory and engagement and prompt action.

Download report →



How ad experiences impact streaming for viewers across Europe

Viewers in France, Germany, Italy, Spain and the UK were surveyed on what they expect from streaming ads.

Download report →



Actionable insights for the modern TV advertiser

Comcast Advertising and FreeWheel data show how multiscreen TV advertising is watched, bought and sold.

Download report →

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APPENDIX

Sectors and country comparison

Objectives and spend plans by sector
Priorities, drivers, barriers, effectiveness, measurement, premium, CPM and curation by market

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FR

COUNTRY-SPECIFIC DATA

France

Budget outlook · Spend intentions · Budget split · Premium video · Objectives · Strategic priorities

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FRANCE · BUDGET OUTLOOK

Some optimism from French marketers

Overall marketing budget, next 12 months

31%

expect an increase

30%

expect a decrease

57%

are looking to increase streaming TV investments

86%

find streaming TV effective at delivering the objectives that matter most

Budget constraints are shaping marketing allocation

Budgets are widely expected to stay the same, but there is some subdued optimism, with slightly more marketers expecting an increase in marketing spend over the next 12 months.

Heading into 2027

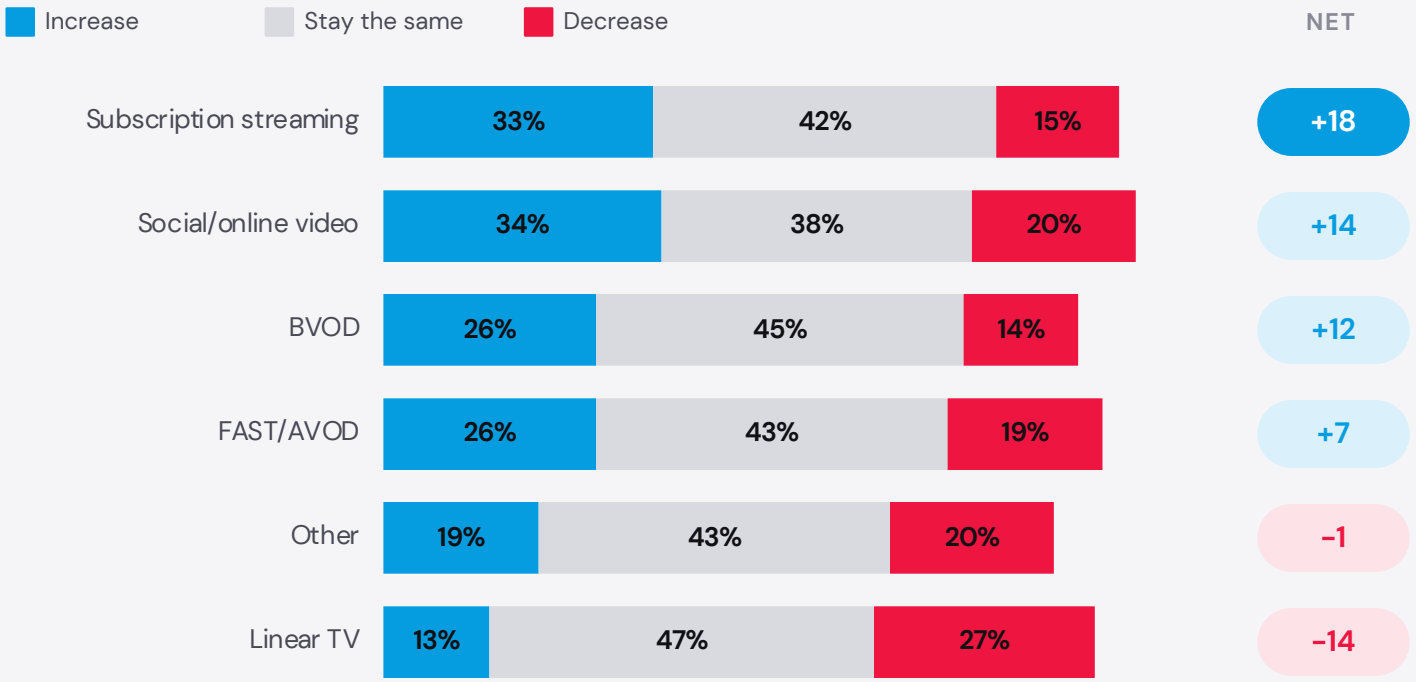
The priority is CTV / streaming investment (incl. BVOD), with less focus on linear TV and social video – driven by high perceived effectiveness of premium streaming / CTV.

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Subscription streaming and social/online video lead spend growth, while linear TV faces contraction

Spend intentions by platform, next 12 months

% of marketers



STRONGEST NET GROWTH

+18

Subscription streaming

WEAKEST NET GROWTH

-14

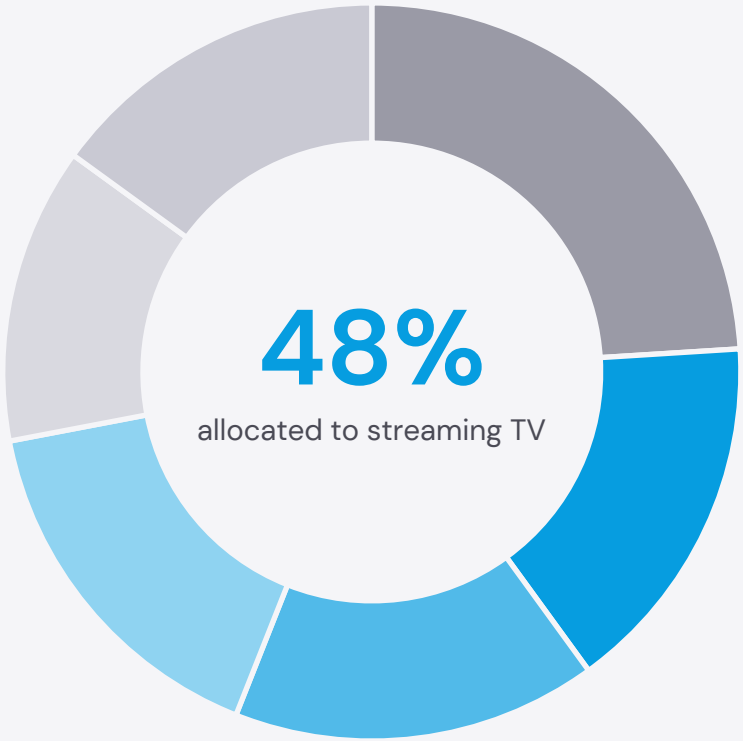
Linear TV

n=100 Marketing Decision Makers & Influencers (France)
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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FRANCE · BUDGET SPLIT

Strong allocation of spend is driven by streaming TV



Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

Social/online video	24%
Subscription streaming	**16%**
FAST/AVOD	**16%**
BVOD	**16%**
Linear TV	13%
Other	15%

Streaming TV = subscription streaming, FAST/AVOD and BVOD

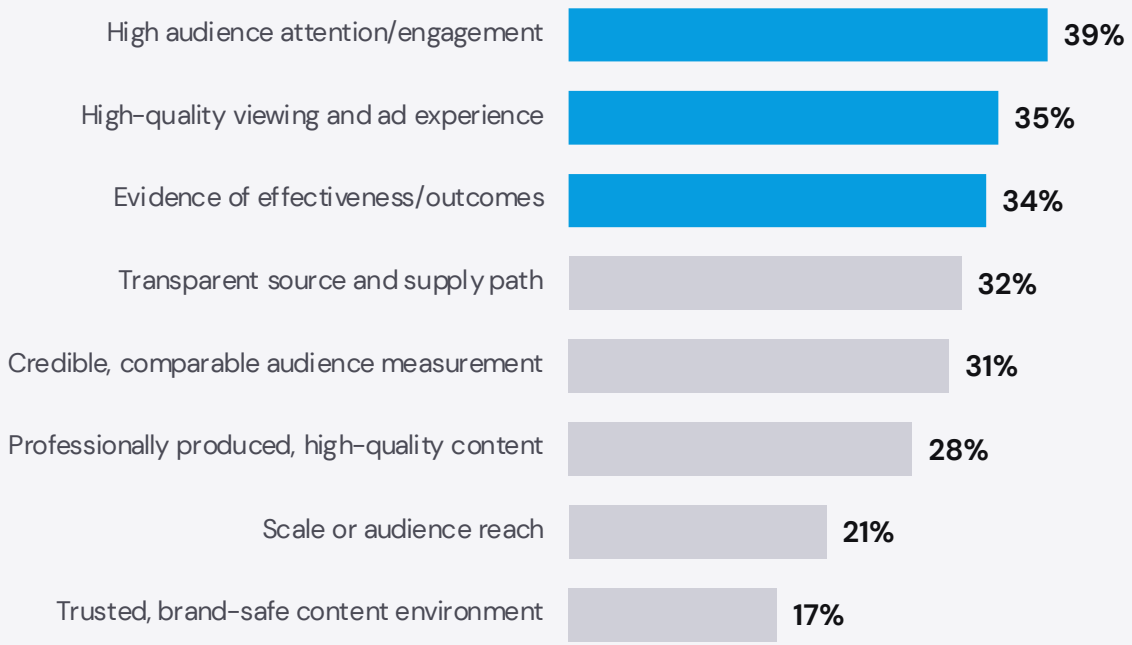
n=100 Marketing Decision Makers & Influencers (France)

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FRANCE · PREMIUM VIDEO

For French marketers, premium video is defined first by attention and engagement

Attributes that make video inventory 'premium'
% selecting each attribute



Attention comes first – ahead of the quality of the viewing experience.

Attention leads (39%)

High attention and engagement define premium for French marketers.

Outcomes matter

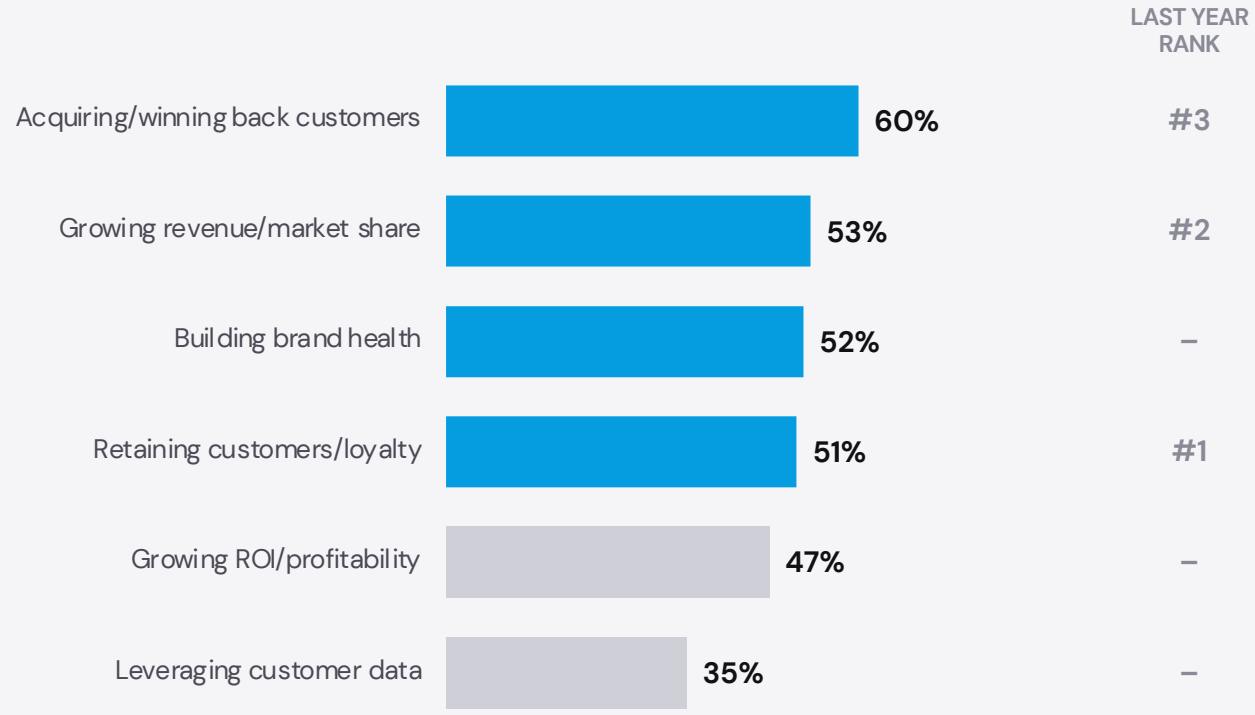
34% consider premium as essential to effectiveness – supporting the goal of winning back customers in a volatile economy.

n=100 Marketing Decision Makers & Influencers (France)
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?

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Customer acquisition moves to the top of the marketing agenda

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



Acquisition is now #1 (60%), up from third place last year.

Acquisition vs retention

Over five years, priorities have swung between winning and keeping customers – balancing growth with brand value.

A fragile context

The shift signals the fragility of the economy and consumer volatility.

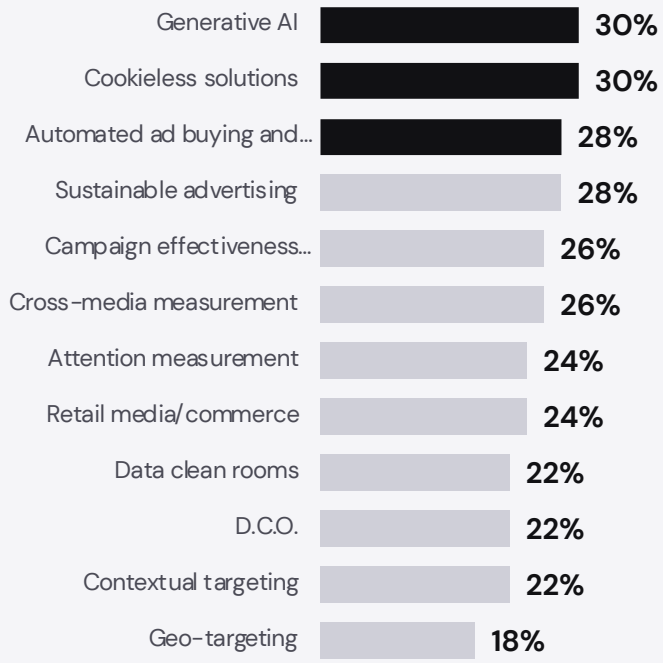
n=100 Marketing Decision Makers & Influencers (France)
Question: Which of the following overall marketing objectives are currently most important to your business when running ad campaigns? (Please select the three objectives that matter most to you.)

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Agencies prioritise automation and Gen AI, while advertisers place much emphasis on ID solutions

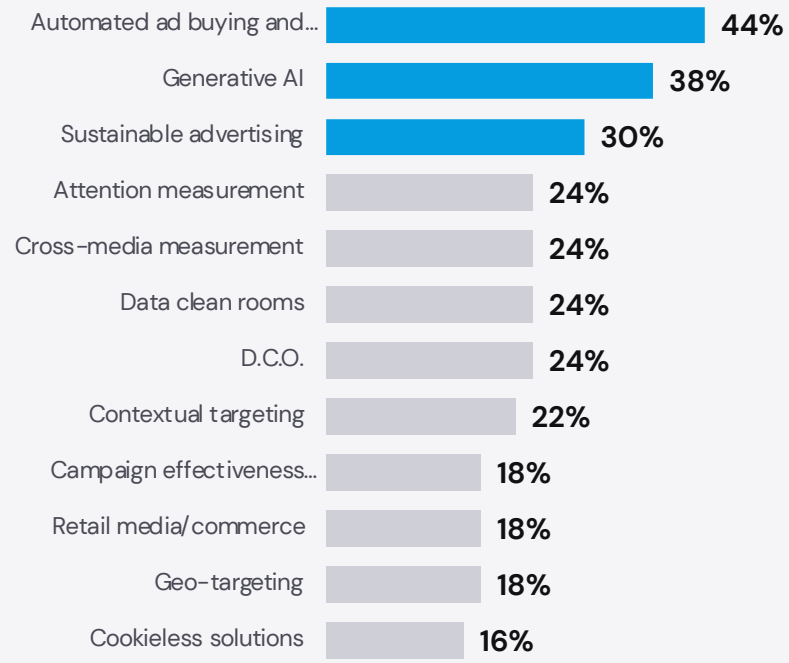
Top strategic priorities – advertisers

% ranking in their top 3 (n=50)



Top strategic priorities – agencies

% ranking in their top 3 (n=50)



n=50 agencies and 50 advertisers (France)
Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

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UK

COUNTRY-SPECIFIC DATA

UK

Budget outlook · Spend intentions · Budget split · Premium video · Objectives · Strategic priorities

COMCAST ADVERTISING

UK · BUDGET OUTLOOK

UK marketers remain amongst the most optimistic in EU5

Overall marketing budget, next 12 months

26% expect an increase

19% expect a decrease

60%

are looking at increasing streaming TV investments

87%

find streaming TV effective at delivering the objectives that matter most

Budget constraints are shaping marketing allocation

UK marketers appear to be amongst the most optimistic, with a net positive share expecting an increase in marketing budget.

Heading into 2027

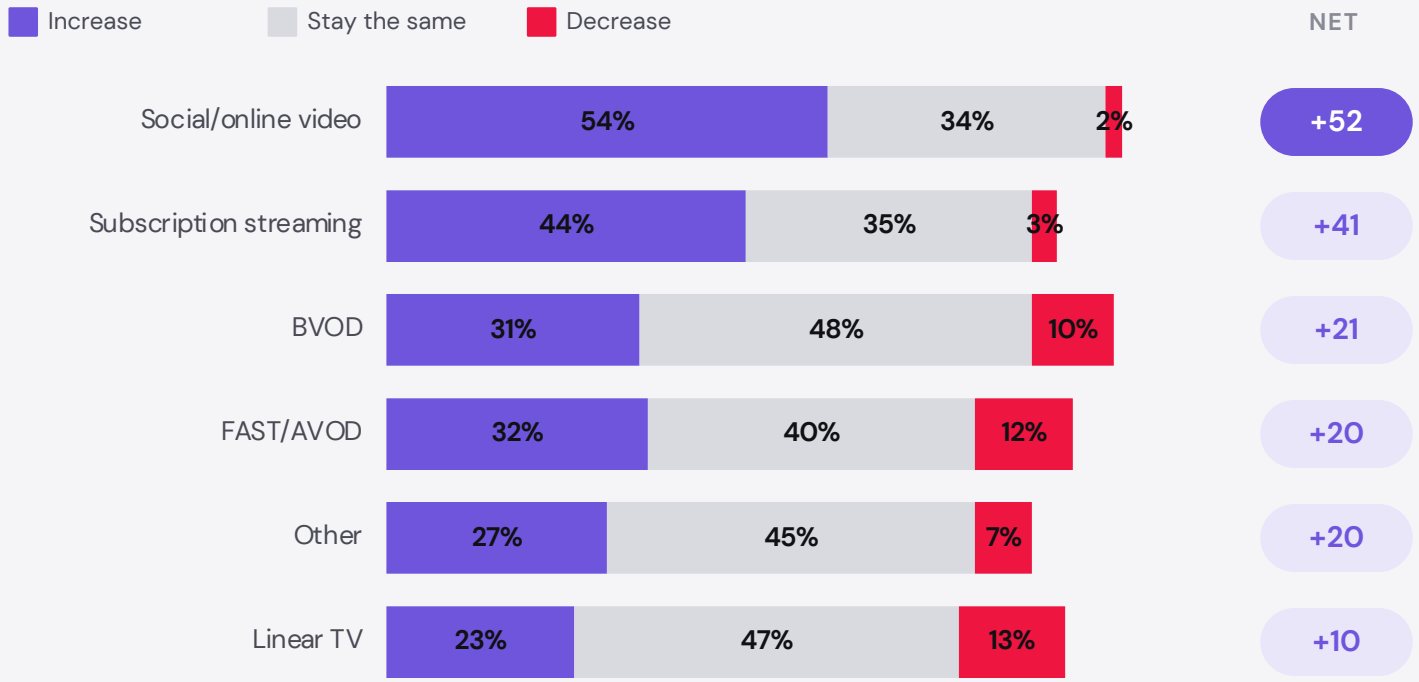
The priority is CTV/streaming TV investment, with less focus on linear TV – driven by high perceptions of marketing effectiveness in streaming/CTV.

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Spend intentions are positive across all video platforms, led by social/online video and subscription streaming

Spend intentions by platform, next 12 months

% of marketers



STRONGEST NET GROWTH

+52

Social/online video

WEAKEST NET GROWTH

+10

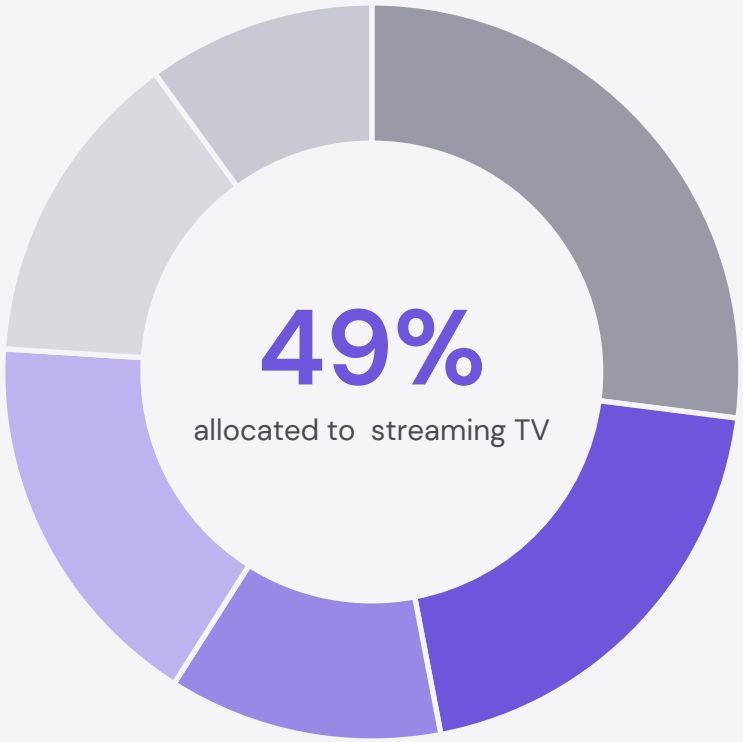
Linear TV

n=100 Marketing Decision Makers & Influencers (UK)
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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UK · BUDGET SPLIT

Strong allocation of spend is driven by streaming TV



Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

Social/online video	27%
Subscription streaming	**20%**
FAST/AVOD	**12%**
BVOD	**17%**
Linear TV	14%
Other	10%

Streaming TV = subscription streaming, FAST/AVOD and BVOD

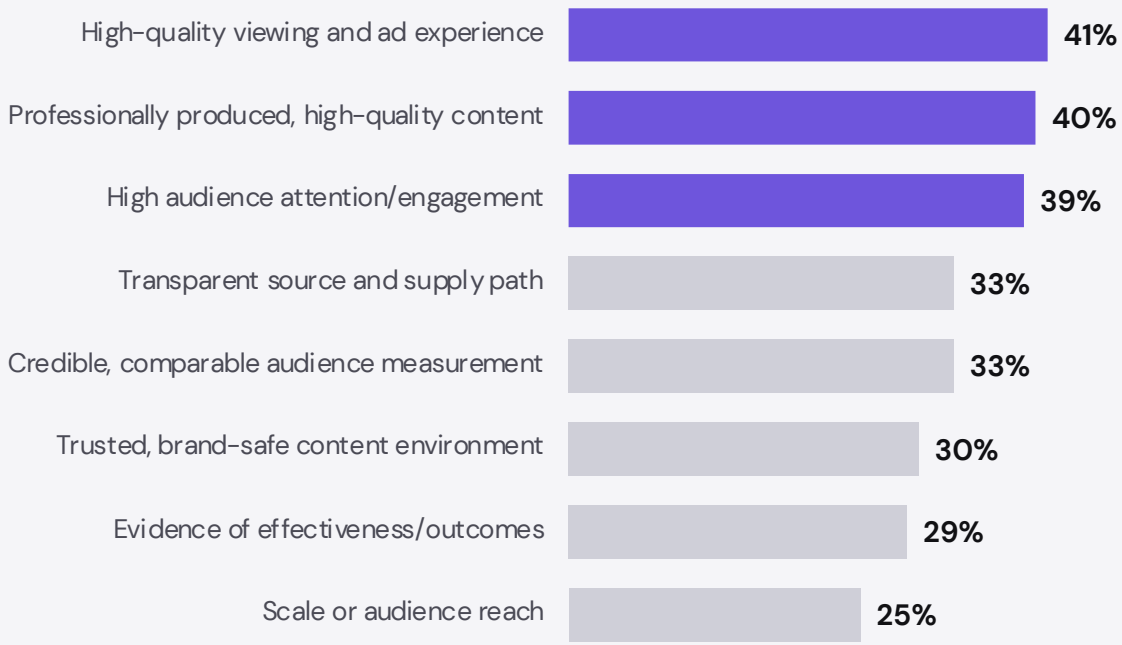
n=100 Marketing Decision Makers & Influencers (UK)

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UK · PREMIUM VIDEO

Premium video is defined by the quality of the experience, content and attention it delivers

Attributes that make video inventory 'premium'
% selecting each attribute



Experience, content and attention are almost tied.

Advertisers: attention

Advertisers place much greater emphasis on audience attention.

Agencies: transparency

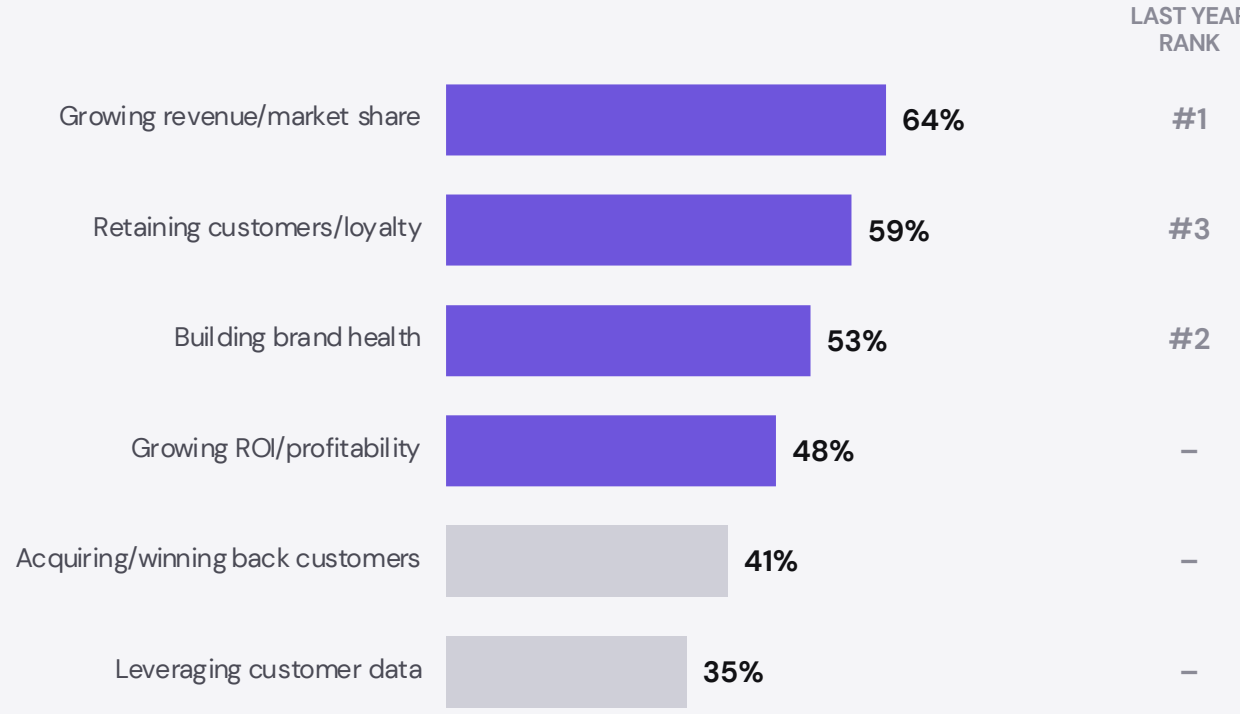
Agencies prioritise transparency of the inventory supply path.

n=100 Marketing Decision Makers & Influencers (UK)
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?

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Growth still at the top of the marketing agenda

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



Growing revenue and market share is firmly at the top (64%).

Long term still matters

Existing customers and brand-building both remain priorities for more than half of UK marketers.

Balancing pressure and value

Consistent with wider industry evidence: UK marketers balance growth ambitions with retention and brand health.

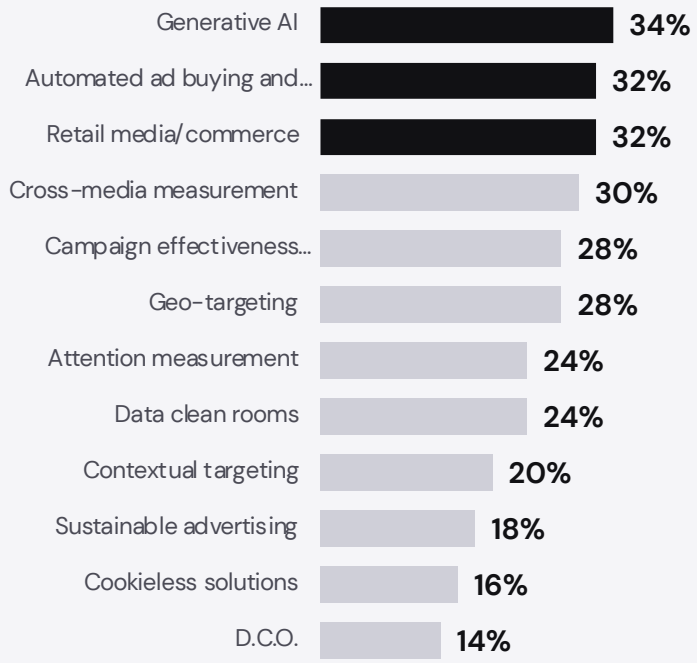
n=100 Marketing Decision Makers & Influencers (UK)
Question: Which of the following overall marketing objectives are currently most important to your business when running ad campaigns? (Please select the three objectives that matter most to you.)

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Agencies lean more towards Gen AI and emerging media capabilities, while advertiser priorities are more varied

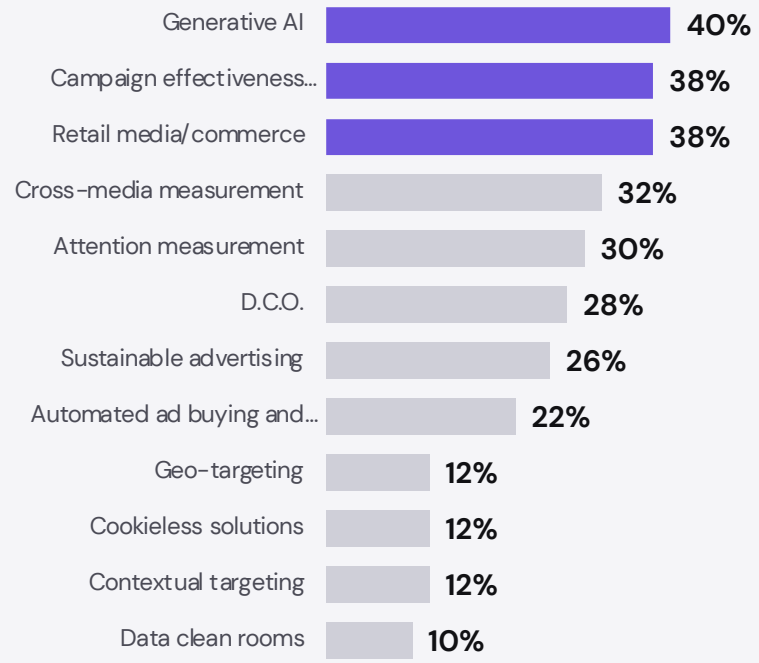
Top strategic priorities – advertisers

% ranking in their top 3 (n=50)



Top strategic priorities – agencies

% ranking in their top 3 (n=50)



n=50 agencies and 50 advertisers (UK)
Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

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ES

COUNTRY-SPECIFIC DATA

Spain

Budget outlook · Spend intentions · Budget split · Premium video · Objectives · Strategic priorities

COMCAST ADVERTISING

SPAIN · BUDGET OUTLOOK

Spanish marketers plan to adjust their marketing spend

Overall marketing budget, next 12 months

14% expect an increase

36% expect a decrease

51%

are looking at increasing streaming TV investments

77%

find streaming TV effective at delivering the objectives that matter most

Budget constraints are shaping marketing allocation

Spanish marketers are by far the most cautious, with a majority expecting a decrease in overall marketing budget.

Heading into 2027

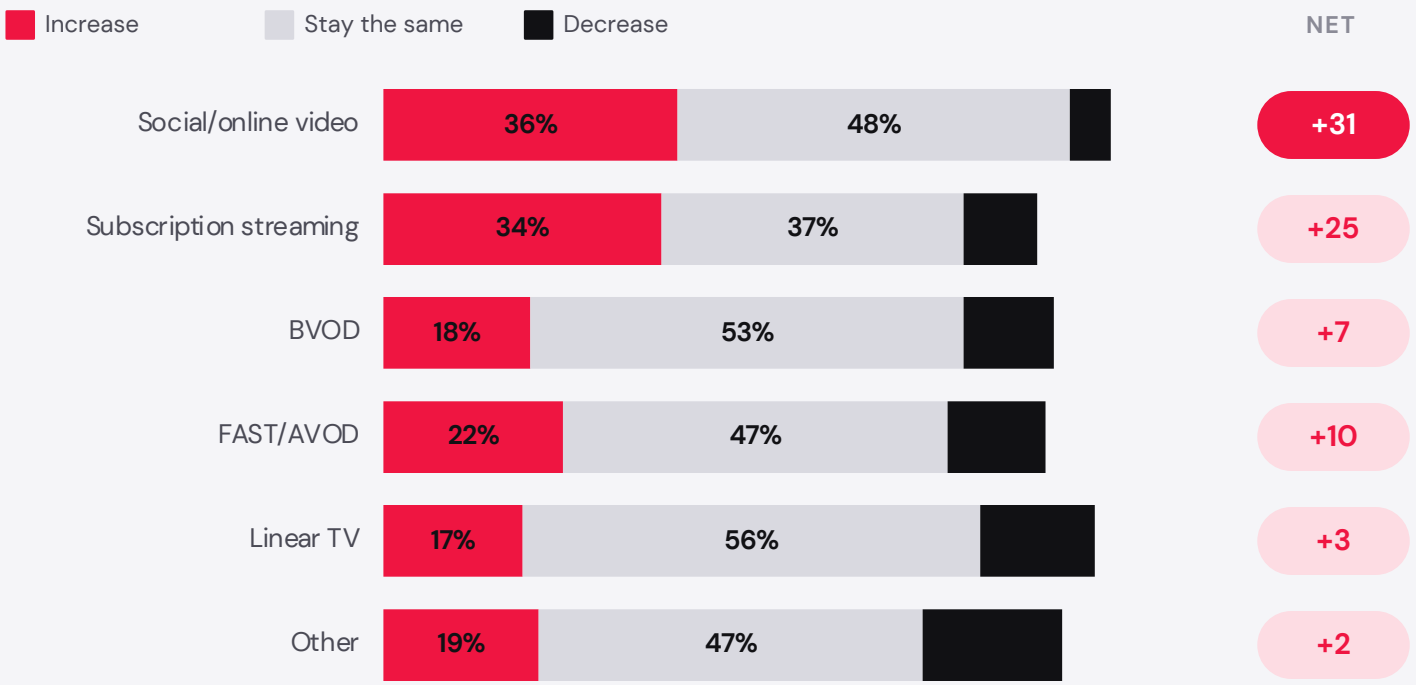
The priority is CTV/streaming TV investment, with less focus on linear TV–driven by high perceptions of marketing effectiveness in CTV.

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Social video and subscription streaming spend grow, linear and BVOD hold steady

Spend intentions by platform, next 12 months

% of marketers



STRONGEST NET GROWTH

+31

Social/online video

WEAKEST NET GROWTH

+2

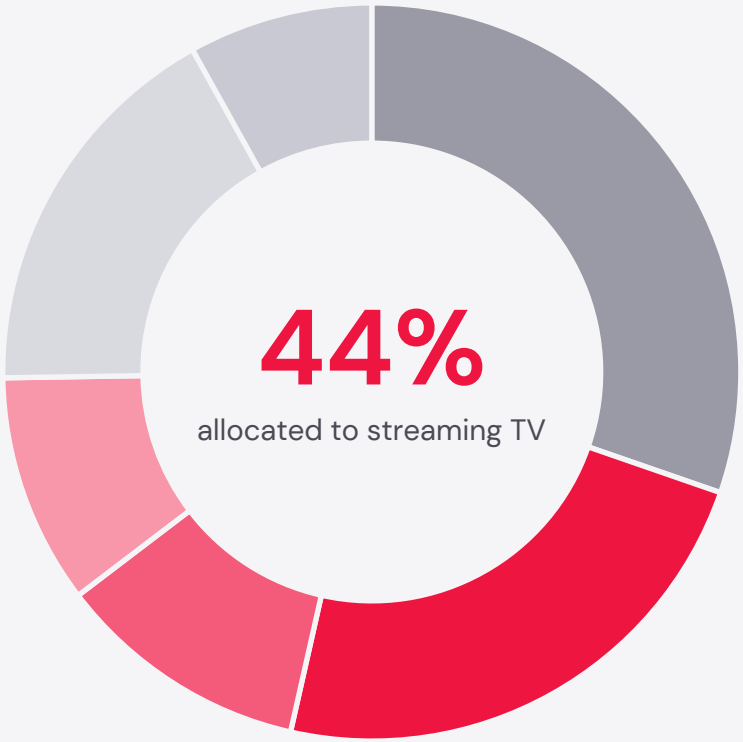
Other

n=100 Marketing Decision Makers & Influencers (Spain) – average of advertiser and agency responses
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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SPAIN · BUDGET SPLIT

Strong allocation of spend is driven by streaming TV



Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

Social/online video	30%
Subscription streaming	23%
FAST/AVOD	11%
BVOD	10%
Linear TV	17%
Other	8%

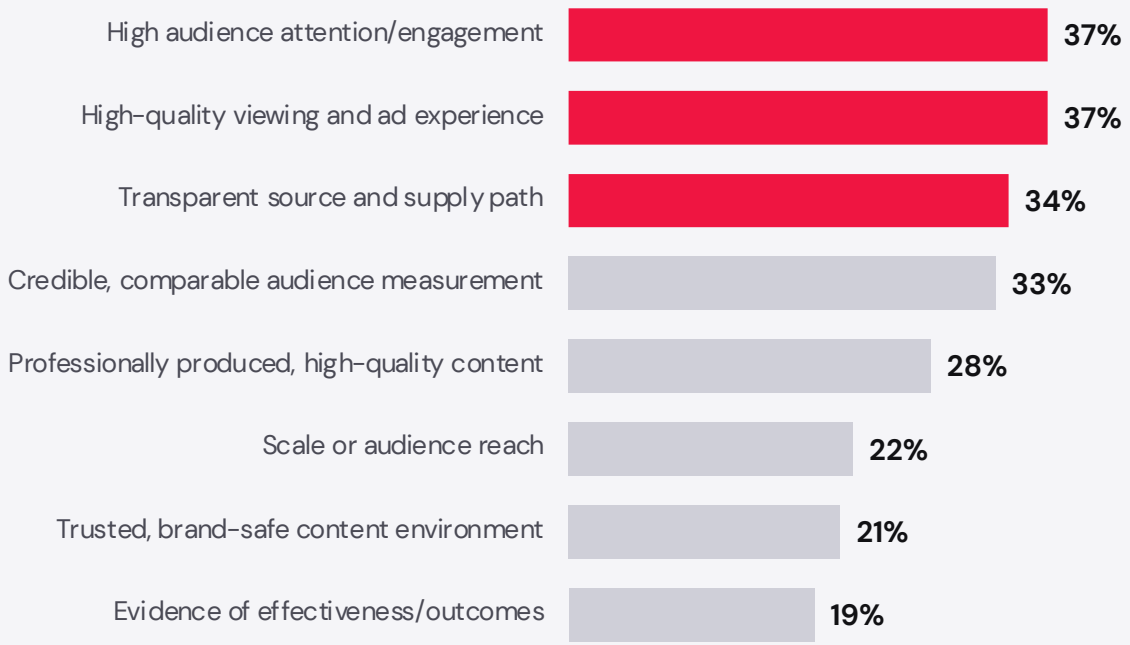
Streaming TV = subscription streaming, FAST/AVOD and BVOD

n=100 Marketing Decision Makers & Influencers (Spain)

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Premium video is defined by the viewing experience and the attention it delivers

Attributes that make video inventory 'premium'
% selecting each attribute



Attention and viewing experience lead, well ahead of the quality of content.

Transparency beats production

In a complex media and supply chain, the source of the inventory (34%) matters more than production quality (28%).

Measurement counts

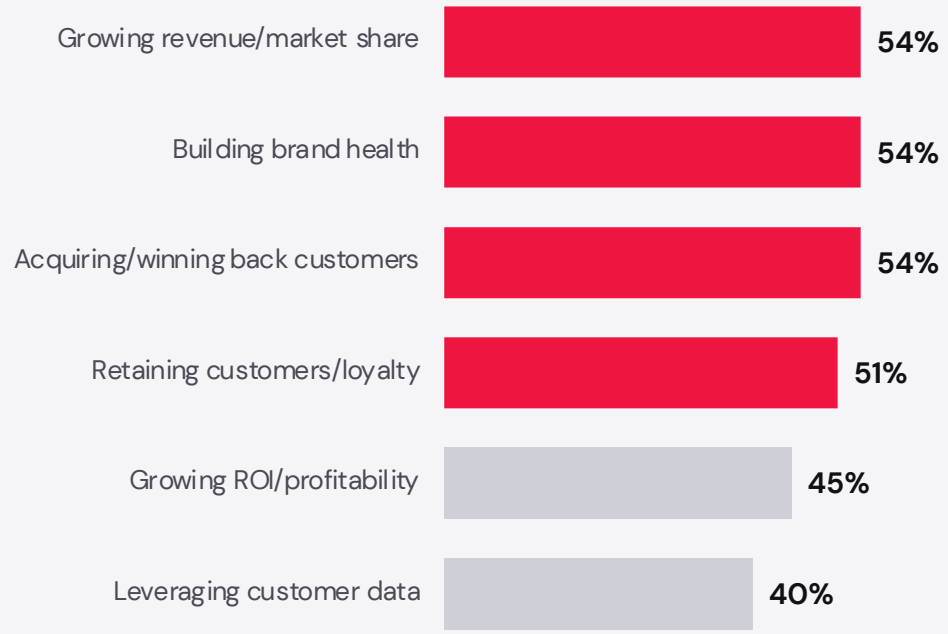
For marketers credible, comparable audience measurement are essential traits for premium.

n=100 Marketing Decision Makers & Influencers (Spain)
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?

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Campaigns focus on long-term metrics

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



Market share, brand health and customers equally important for Spanish marketers

Brand-building focus

Spanish marketers focus more on brand awareness and consideration than other countries.

A longer-term outlook

A sign of longer-term thinking in marketing strategies.

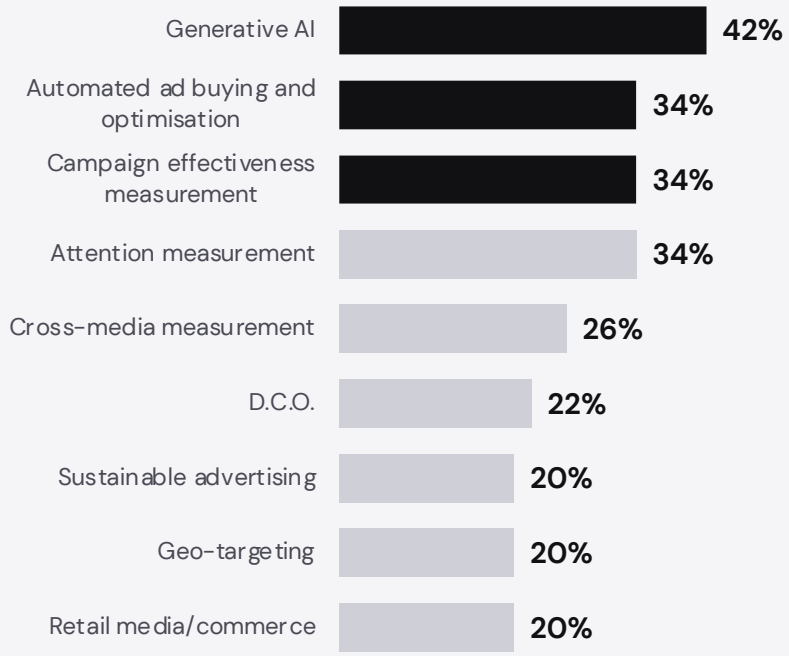
n=100 Marketing Decision Makers & Influencers (Spain)
Question: Which of the following overall marketing objectives are currently most important to your business when running ad campaigns? (Please select the three objectives that matter most to you.)

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AI and automation are the top priority; advertisers place more emphasis on measurement, agencies are leaning on data

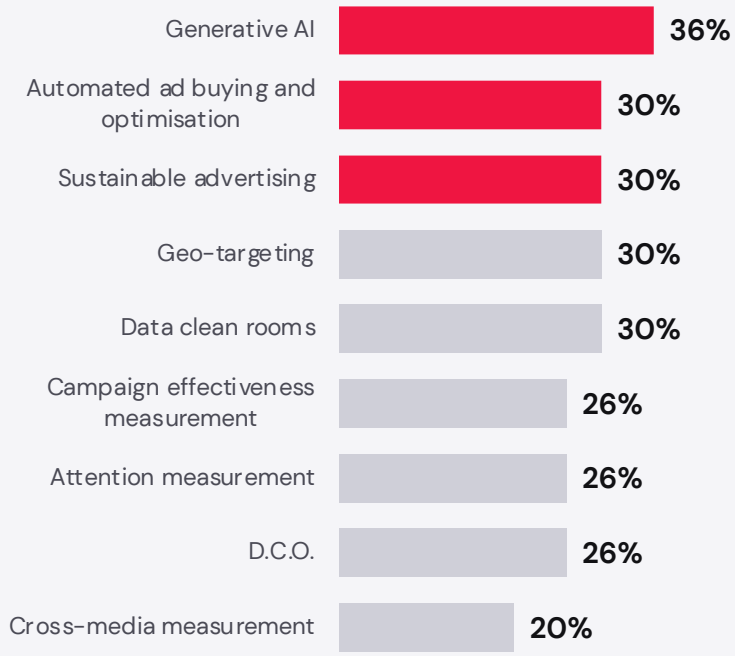
Top strategic priorities – advertisers

% ranking in their top 3 (n=50)



Top strategic priorities – agencies

% ranking in their top 3 (n=50)



n=50 agencies and 50 advertisers (Spain)
Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

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IT

COUNTRY-SPECIFIC DATA

Italy

Budget outlook · Spend intentions · Budget split · Premium video · Objectives · Strategic priorities

COMCAST ADVERTISING

ITALY · BUDGET OUTLOOK

Italian marketers plan to adjust their marketing spend

Overall marketing budget, next 12 months

15% expect an increase

28% expect a decrease

60%

are looking at increasing streaming TV investments

78%

find streaming TV effective at delivering the objectives that matter most

Budget constraints are shaping marketing allocation

A large majority of Italian marketers remain cautious, with 57% expecting their overall marketing budget to stay the same.

Heading into 2027

Strong priority with CTV/streaming TV while maintaining some investments in linear TV – this is driven by high confidence in both linear TV and streaming compared to other channels.

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ITALY · SPEND INTENTIONS

Social video and subscription streaming spend grow, linear and BVOD hold steady

Spend intentions by platform, next 12 months

% of marketers



STRONGEST NET GROWTH

+41

Subscription streaming

WEAKEST NET GROWTH

+13

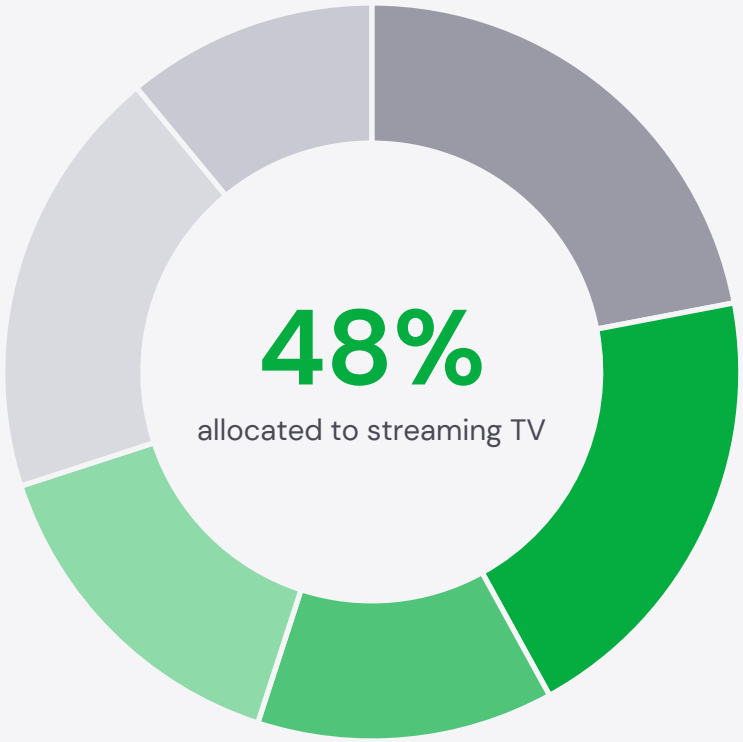
FAST/AVOD

n=100 Marketing Decision Makers & Influencers (Italy) – average of advertiser and agency responses
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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ITALY · BUDGET SPLIT

Strong allocation of spend is driven by streaming TV



Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

Social/online video	22%
Subscription streaming	**20%**
FAST/AVOD	**13%**
BVOD	**15%**
Linear TV	19%
Other	11%

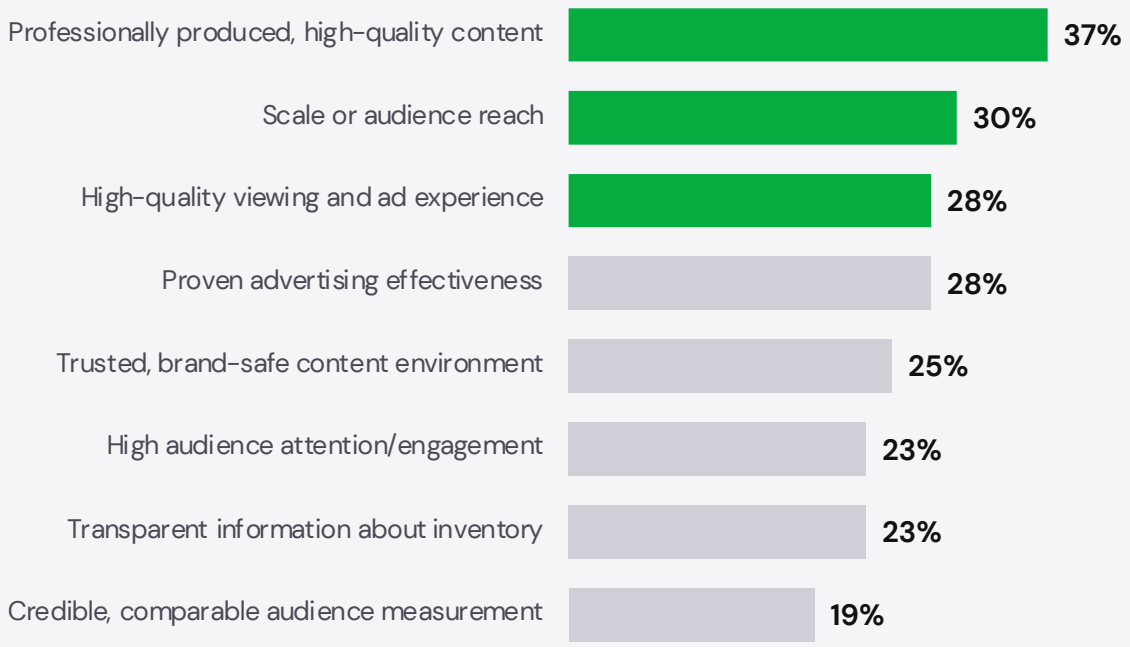
Streaming TV = subscription streaming, FAST/AVOD and BVOD

n=100 Marketing Decision Makers & Influencers (Italy)

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For Italian marketers, premium starts with professionally produced content

Attributes that make video inventory 'premium'
% selecting each attribute



Content quality is the clear #1 – well ahead of scale and the viewing experience

Content is king

Professionally produced content is the most cited attribute.

Reach still counts

For Italian marketers, audience reach is an essential attribute of premium, ahead of the ad experience and effectiveness.

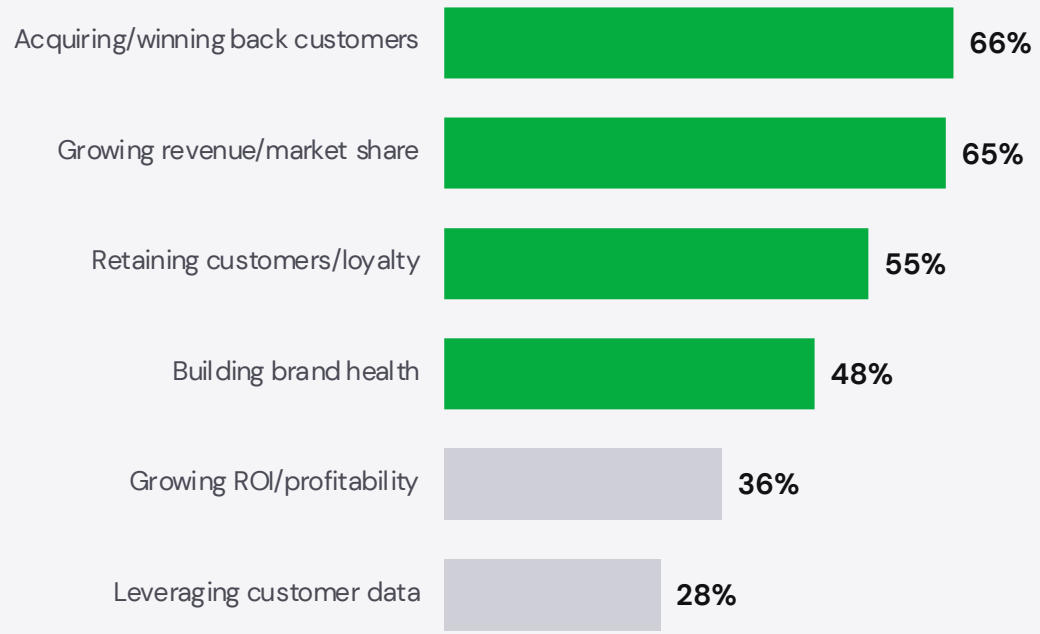
n=100 Marketing Decision Makers & Influencers (Italy)
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?

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ITALY · MARKETING OBJECTIVES

For Italian marketers, it is about balancing brand-building and performance objectives

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



A full-funnel approach: acquisition, revenue growth and loyalty lead.

Brand and performance together

Italian marketers balance revenue growth and brand health with customer acquisition and retention.

Why CTV fits

Reach and precision both matter – CTV combines broad audience delivery with advanced targeting.

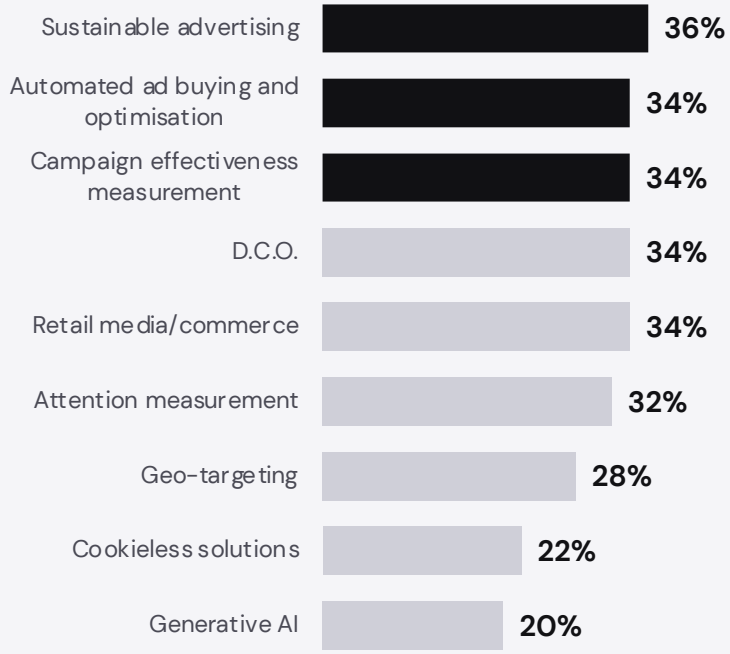
n=100 Marketing Decision Makers & Influencers (Italy)
Question: Which of the following overall marketing objectives are currently most important to your business when running ad campaigns? (Please select the three objectives that matter most to you.)

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Sustainability and Gen AI top agency priorities; advertisers spread their focus more evenly

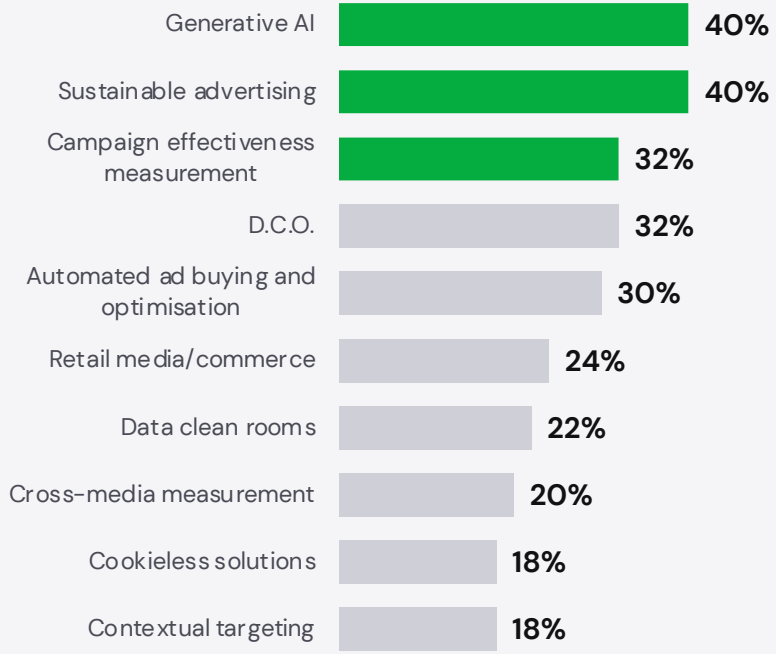
Top strategic priorities – advertisers

% ranking in their top 3 (n=50)



Top strategic priorities – agencies

% ranking in their top 3 (n=50)



n=50 agencies and 50 advertisers (Italy)
Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

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DE

COUNTRY-SPECIFIC DATA

Germany

Budget outlook · Spend intentions · Budget split · Premium video · Objectives · Strategic priorities

COMCAST ADVERTISING

GERMANY · BUDGET OUTLOOK

German marketers plan to adjust their marketing spend

Overall marketing budget, next 12 months

19% expect an increase

24% expect a decrease

49%

are looking at increasing social and online investments

81%

find streaming TV effective at delivering the objectives that matter most

Budget constraints are shaping marketing allocation

German marketers remain generally cautious, with a majority (57%) expecting their overall marketing budget to stay the same.

Heading into 2027

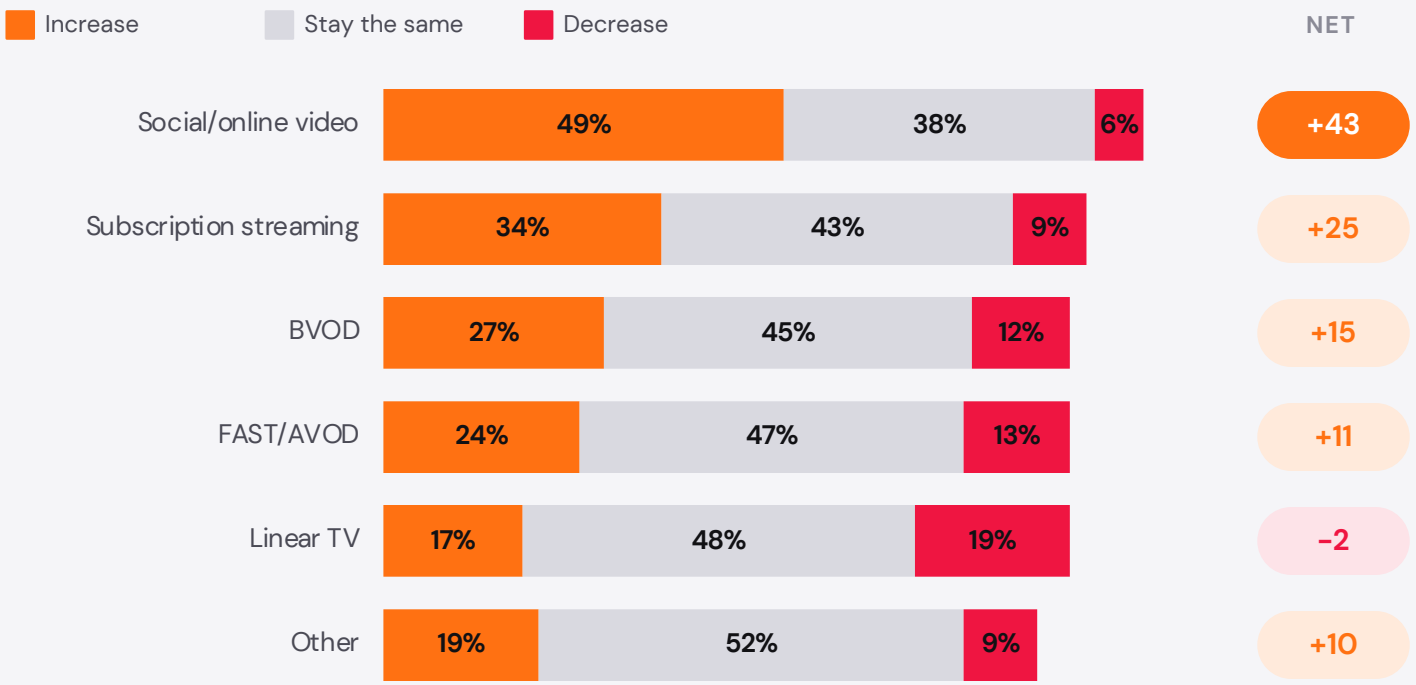
The priority is social/online and streaming TV investment, with less focus on linear TV – driven by high perceived effectiveness of social and CTV.

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Social video and subscription streaming spend grow, linear contracts

Spend intentions by platform, next 12 months

% of marketers



STRONGEST NET GROWTH

+43

Social/online video

WEAKEST NET GROWTH

-2

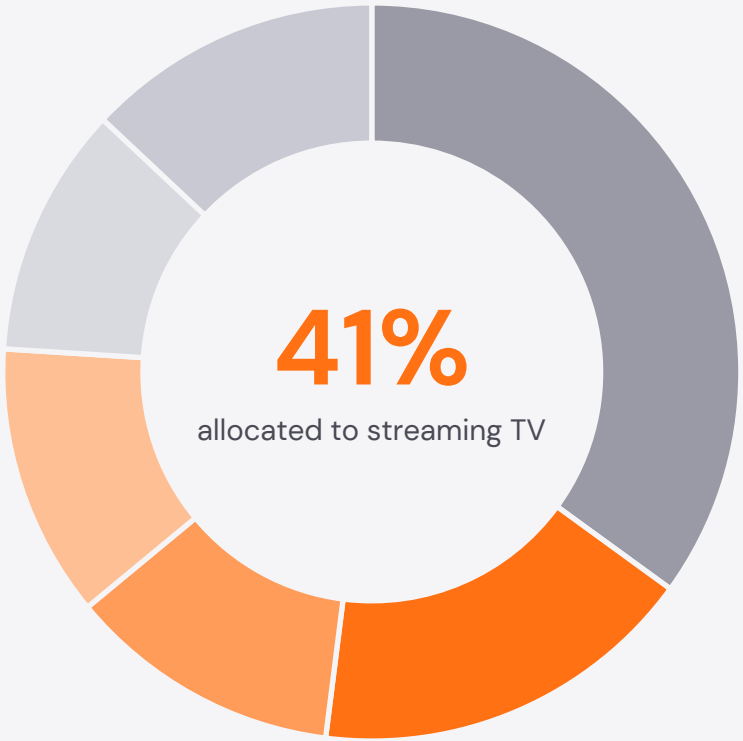
Linear TV

n=100 Marketing Decision Makers & Influencers (Germany) – average of advertiser and agency responses
Question: How do you expect your organisation's spending on each of the following types of television and video to change over the next 12 months?
Net = % increase minus % decrease.

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GERMANY · BUDGET SPLIT

Strong allocation of spend is driven by streaming TV



Approximately what proportion of your annual TV and video advertising budget is currently spent on each of the following?

Social/online video	35%
Subscription streaming	17%
FAST/AVOD	12%
BVOD	12%
Linear TV	11%
Other	13%

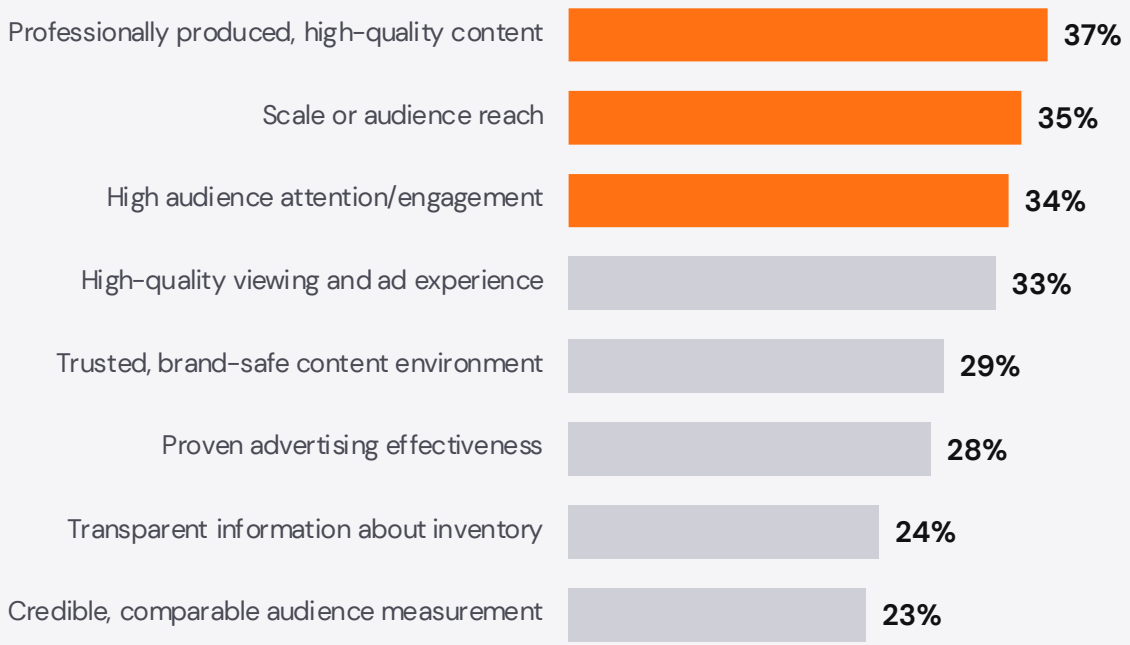
Streaming TV = subscription streaming, FAST/AVOD and BVOD

n=100 Marketing Decision Makers & Influencers (Germany)

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For German marketers, premium means quality content at scale

Attributes that make video inventory 'premium'
% selecting each attribute



Content and scale lead – the highest score for reach in EU5.

Content first

Professionally produced content is the #1 attribute for German marrketers

Reach matters most here

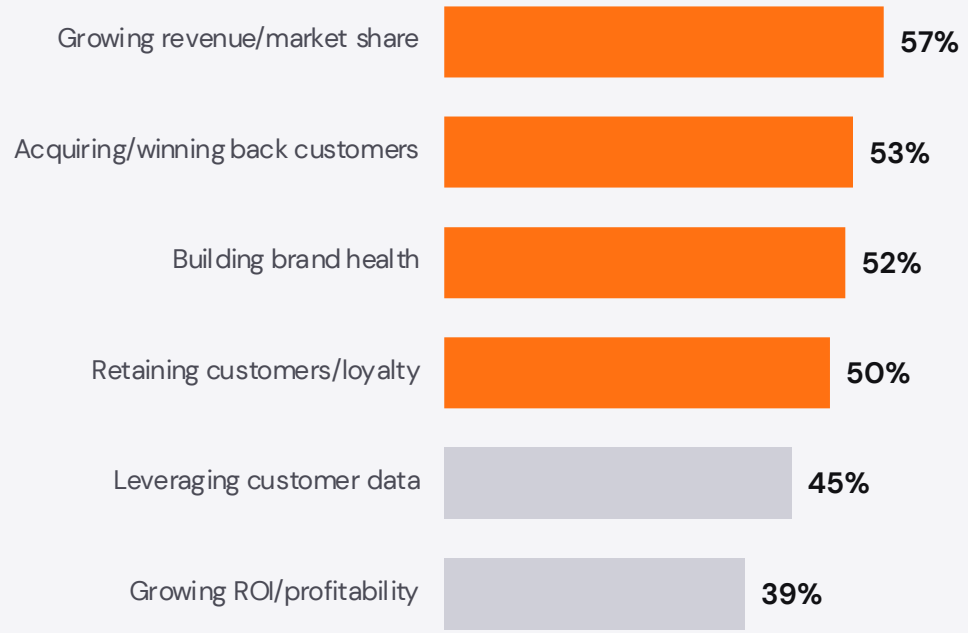
Scale or audience reach appear critical – more than any other market; inline with their goal to gain market share.

n=100 Marketing Decision Makers & Influencers (Germany)
Question: Which attributes are most important in determining whether video advertising inventory should be considered 'premium'?

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Campaigns are mixed between upper and lower funnel marketing priorities

Top marketing objectives in the next 12 months
% ranking each objective in their top 3



Market share and customer acquisition matter the most.

Upper and lower funnel

Split between revenue growth and brand health, and lower-funnel goals like acquisition.

Why CTV fits

This explains their focus on reach, and on the advanced targeting they can find in CTV.

n=100 Marketing Decision Makers & Influencers (Germany)
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.)

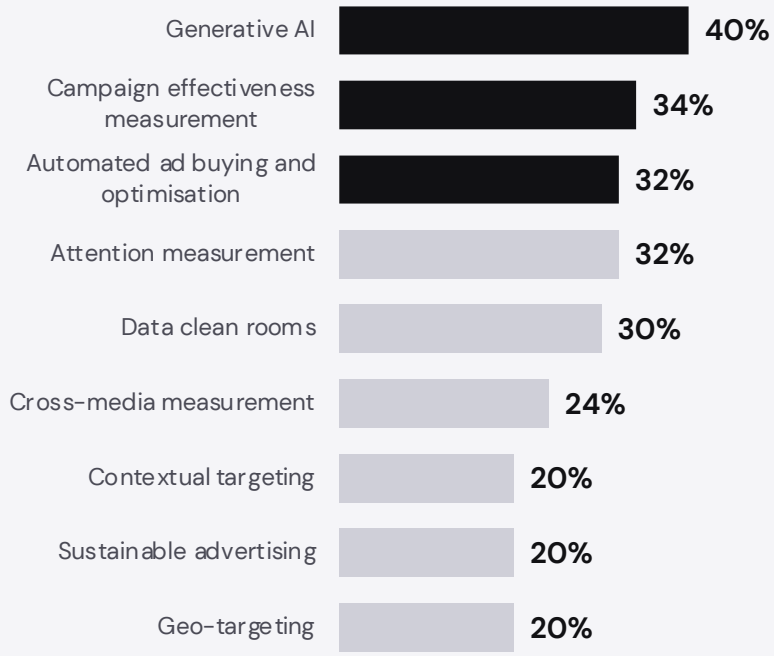
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GERMANY · STRATEGIC PRIORITIES

AI is the top priority; advertisers emphasise effectiveness measurement, agencies lean on attention and environment

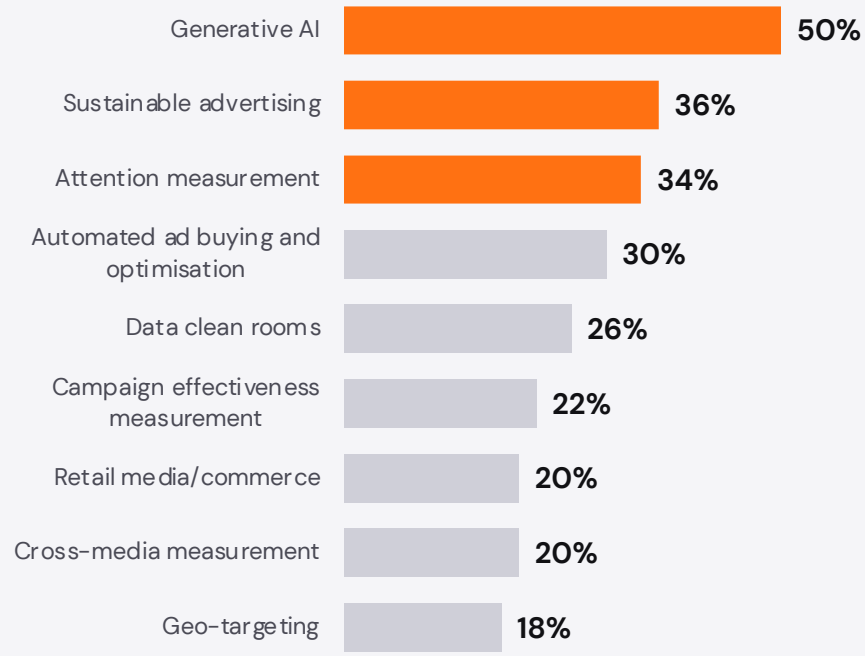
Top strategic priorities – advertisers

% ranking in their top 3 (n=50)



Top strategic priorities – agencies

% ranking in their top 3 (n=50)



n=50 agencies and 50 advertisers (Germany)
Question: What would you say are some of your key areas of priorities for the year ahead when it comes to media strategy?

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