

FREEWHEEL ADVERTISERS  
2H2019 AGENCY SURVEY

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# **THE GROWTH OF ADVANCED ADVERTISING SOLUTIONS AMONG LOCAL AND REGIONAL BUYERS**

**FREEWHEEL**  
A COMCAST COMPANY

As the media landscape continues to fragment, agencies are beginning to look for new ways to reach their customers. Increasingly, this includes buyers of local and regional advertising, who are now shifting their strategies to encompass more data-driven and advanced TV solutions in an effort to help their clients employ efficient, effective media campaigns in “The New TV” landscape.

FreeWheel Advertisers recently surveyed over 430 Strata platform users – most of whom are specialists in local media planning and buying – to understand how their media strategies are changing. Here’s what we found:

**1** While buyers of local and regional advertising still see high value in traditional local TV & cable to achieve their marketing goals, interest in Advanced TV\* is growing rapidly as they try to find their consumers in the evolving media landscape.

\*In this study, Advanced TV was defined as STB VOD, OTT, Addressable TV, Advanced Linear, or Streaming FEPs.

### PLEASE RATE YOUR CLIENTS’ INTEREST IN ADVERTISING ON THE FOLLOWING MEDIA TYPES

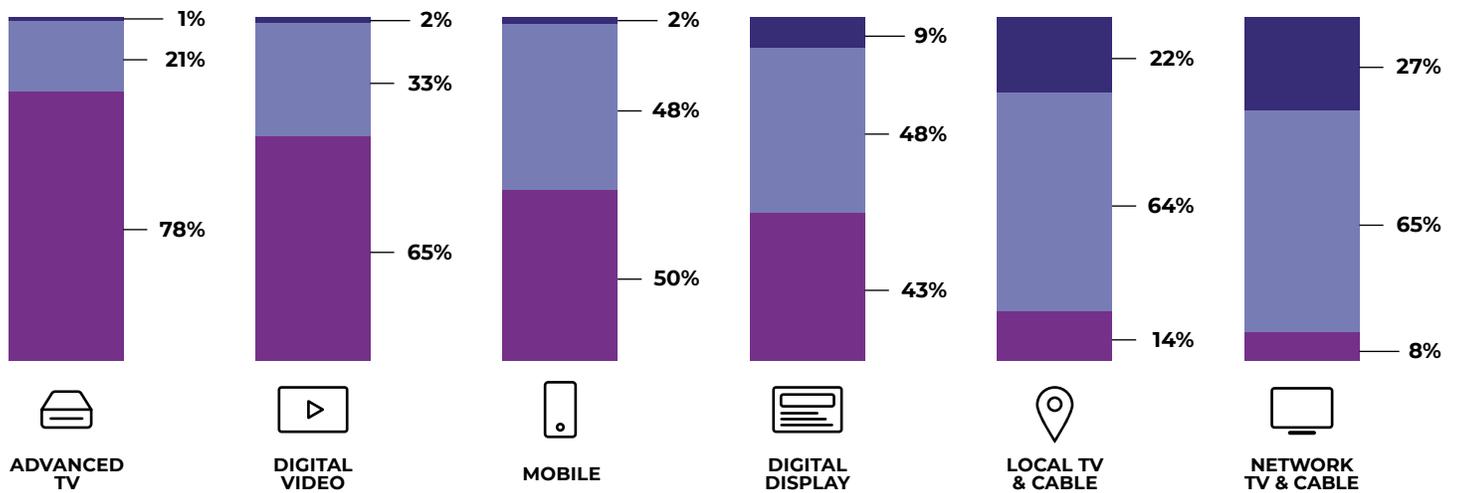
Percentage of respondents who indicated they were extremely or very interested.



**2** With this increased interest from clients, agencies anticipate Advanced TV and Digital Video to increase more than any other medium over the next 12 months. In fact, nearly 80% of agencies buying local and regional advertising expect their Advanced TV budgets to increase over the next 12 months alone.

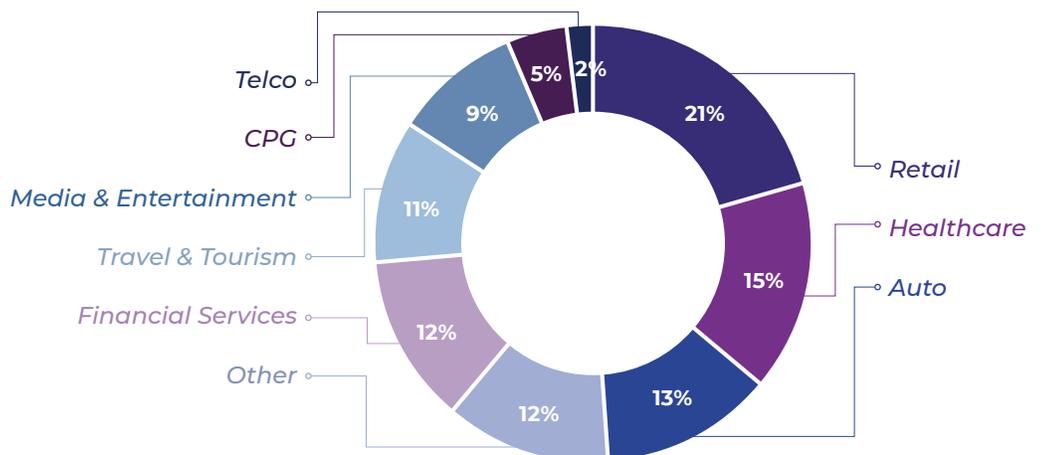
**HOW DO YOU EXPECT YOUR SPEND ON EACH OF THE FOLLOWING MEDIA TYPES WILL CHANGE IN THE NEXT 12 MONTHS?**

● Increase ● Stay the Same ● Decrease



**3** When looked at by category, advertisers are most likely to execute Advanced TV buys for clients in the Retail vertical, followed by the Health Care and Automotive sectors.

**ACROSS WHICH INDUSTRY VERTICALS DO YOU CURRENTLY EXECUTE ADVANCED TV BUYS?**



**4** There are several key factors causing local and regionally focused agencies to make the shift toward advanced solutions such as data-driven, audience-based TV advertising for their clients. Most find the ability to deliver niche audiences and buying efficiencies as primary drivers in their decision to include Advanced TV solutions in their clients' media plans.

**PLEASE RANK THE TOP 3 BENEFITS OF DATA-DRIVEN, AUDIENCE-TARGETED TV ADVERTISING**



**#1 DELIVERS HARD TO REACH AUDIENCES**



**#2 ELIMINATES WASTE**

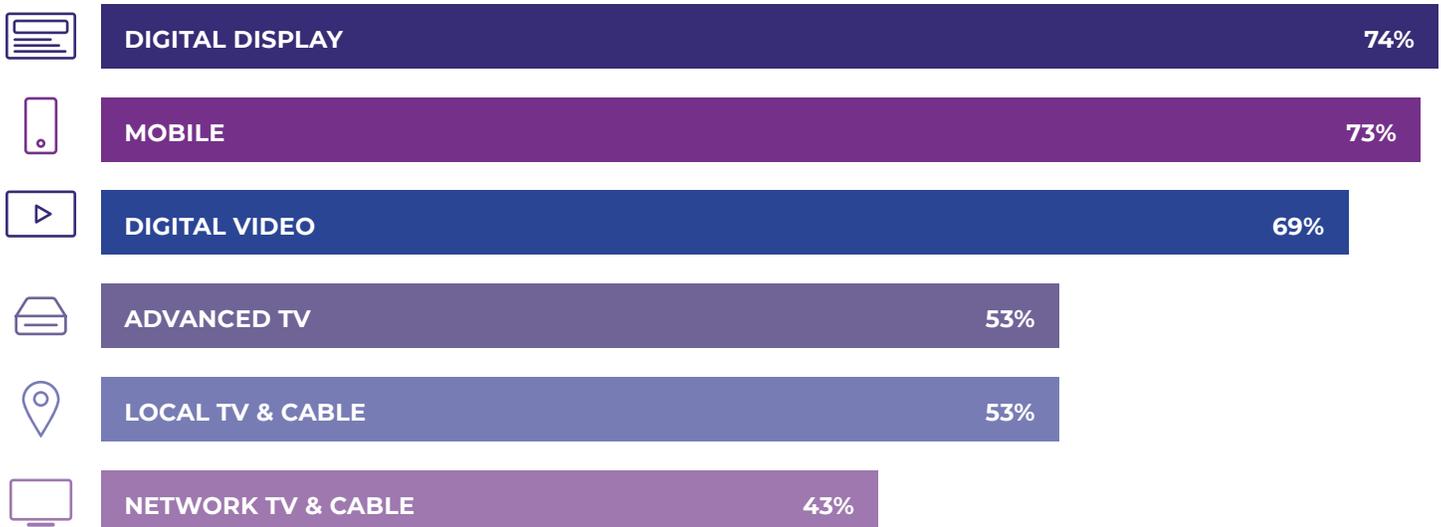


**#3 IMPROVED CPM EFFICIENCY**

**5** Agencies also see advantages in attribution measurement. Over half of these advertisers agree that it is “Easy or Extremely Easy” to measure attribution on Advanced TV, and nearly 7 out of 10 believe this about Digital Video. Interestingly, more than half of agencies also find attribution easy to measure on Local TV and Cable, perhaps indicative of the progress being made in this area by cable companies and other video content distributors.

**PLEASE RATE YOUR ABILITY TO EFFECTIVELY MEASURE CAMPAIGN ATTRIBUTION FOR THE FOLLOWING MEDIA TYPES**

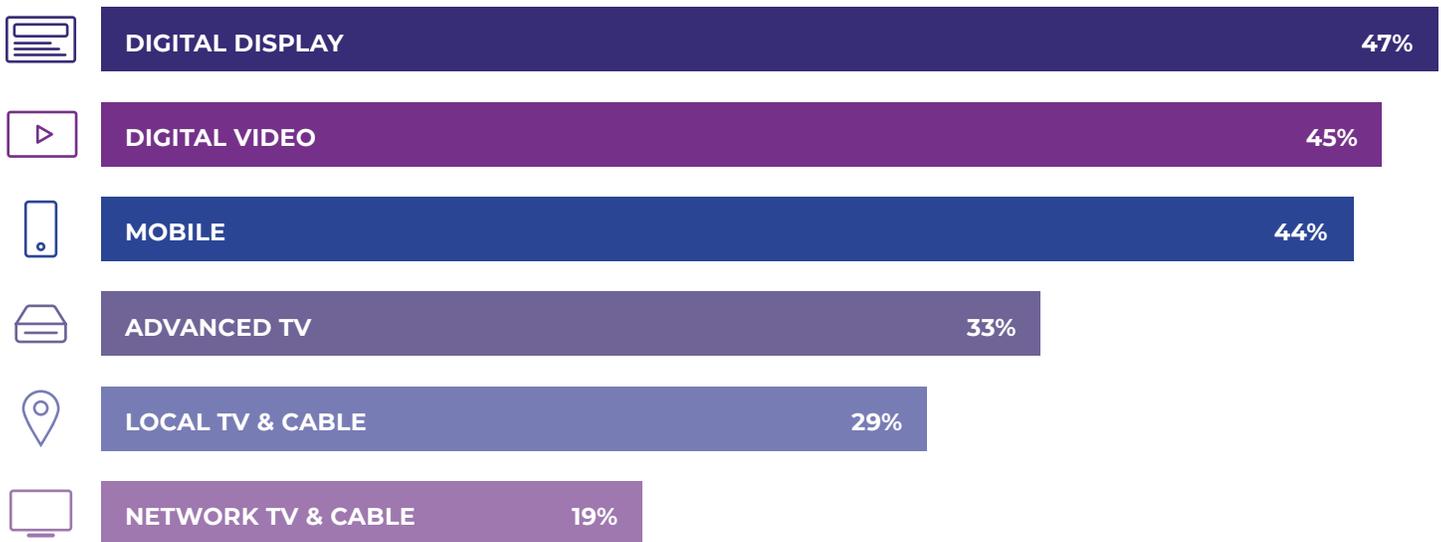
Percentage of respondents who indicated they find it easy or extremely easy.



**6** Progress is also evident in terms of automation. The shift toward data-driven and audience-based buying, coupled with media fragmentation, generally requires greater automation to transact efficiently. As a result, the agencies surveyed are seeing the benefits of automating their buying processes across both digital and linear channels. Even Local TV and Cable – traditionally very manual buying channels – are beginning to embrace automation: more than a quarter of agencies now say their processes for buying local are completely or mostly automated.

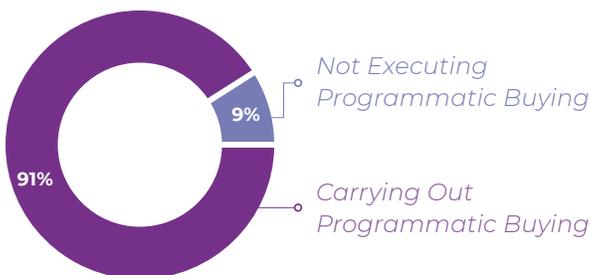
**HOW AUTOMATED ARE YOUR BUYING PROCESSES FOR THE FOLLOWING MEDIA TYPES**

Percentage of respondents who indicated their buying processes are mostly or completely automated

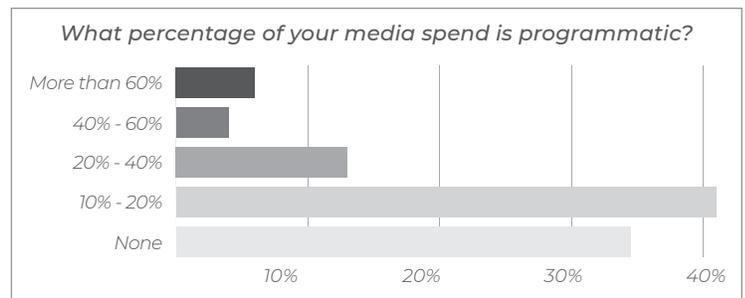


**7** Programmatic buying is one specific area of automation that most agencies surveyed are embracing. Nine out of 10 agencies are executing buys programmatically, aligned with the increase in advanced media spending.

**DO YOU CURRENTLY CARRY OUT SOME FORM OF PROGRAMMATIC BUYING?**



**A LOOK BACK:** In 2017, most agencies surveyed said that only 10-20% of their media spend was Programmatic.



**8** Another capability that has become increasingly important to these agencies alongside the rise of programmatic and audience-based buying is a data management. Data management refers to the agency’s ability to effectively gather, store, and use both first and third-party data on behalf of their clients. Most agencies surveyed perceive their offerings as strong, but a sizable number feel there is room for improvement.

**HOW WOULD YOU RATE YOUR ORGANIZATION’S CURRENT DATA MANAGEMENT CAPABILITY?**

● *Good or Excellent*   ● *Satisfactory, Poor or Extremely Poor*



**9** Importantly, these shifts in buying strategies require changes that stretch beyond technology. As more dollars flow to advanced TV & digital video, agencies focused on local and regional buying are beginning to integrate their traditional and digital media planning and buying teams. Almost 70% of agencies surveyed say their teams are somewhat or completely integrated indicative of the broader industry trend toward cross-media team convergence.

**HOW CLOSELY INTEGRATED ARE YOUR DIGITAL AND TRADITIONAL TV PLANNING AND BUYING PROCESSES?**

● *Somewhat or Completely Integrated*   ● *Completely Separate or Occasional Overlap*



Survey Methodology: This study was executed via an online survey of 430 Strata platform users from 6/13/2019 to 7/1/2019 using the QuestionPro survey platform. While Strata users buy all forms of media, every agency who responded to this survey is a buyer of local and regional advertising – often as their primary focus.

## ABOUT FREEWHEEL

FreeWheel, A Comcast Company, empowers all segments of The New TV Ecosystem. We are structured to provide the full breadth of solutions the advertising industry needs to achieve their goals. We provide the technology, data enablement, and convergent marketplaces required to ensure buyers and sellers can transact across all screens, across all data types, and all sales channels, in order to ensure the ultimate goal – results for marketers. FreeWheel’s Strata Platform automates and simplifies the entire planning, buying and billing process for agencies of all sizes, while maximizing agency control and campaign effectiveness.

To learn more, visit [FreeWheel.com](https://FreeWheel.com) or contact [AgencySurvey@freewheel.com](mailto:AgencySurvey@freewheel.com)

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