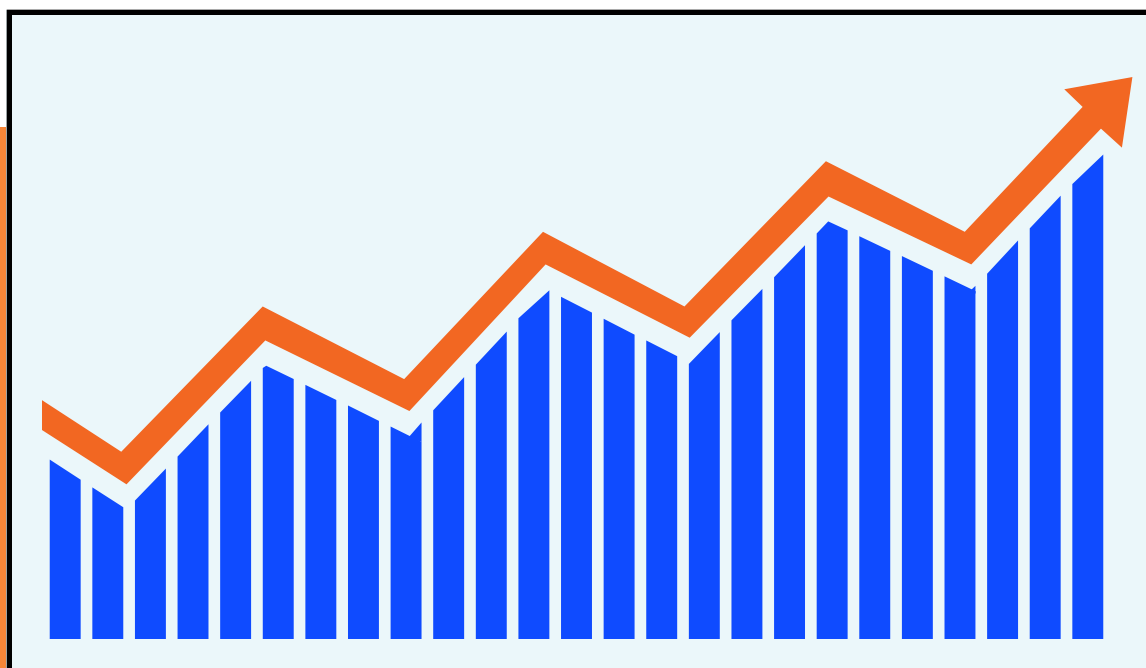


**NewtonX Current**

# **2023 Advertiser Spending: Platform & Publisher Trends**



In partnership with **ADWEEK**

## Summary

Overall, advertisers will increase their ad spend in 2023 compared to 2021. Publishers will benefit from the increased budgets. About half of the respondents (53%) are planning to spend more money on publishers in the next year.

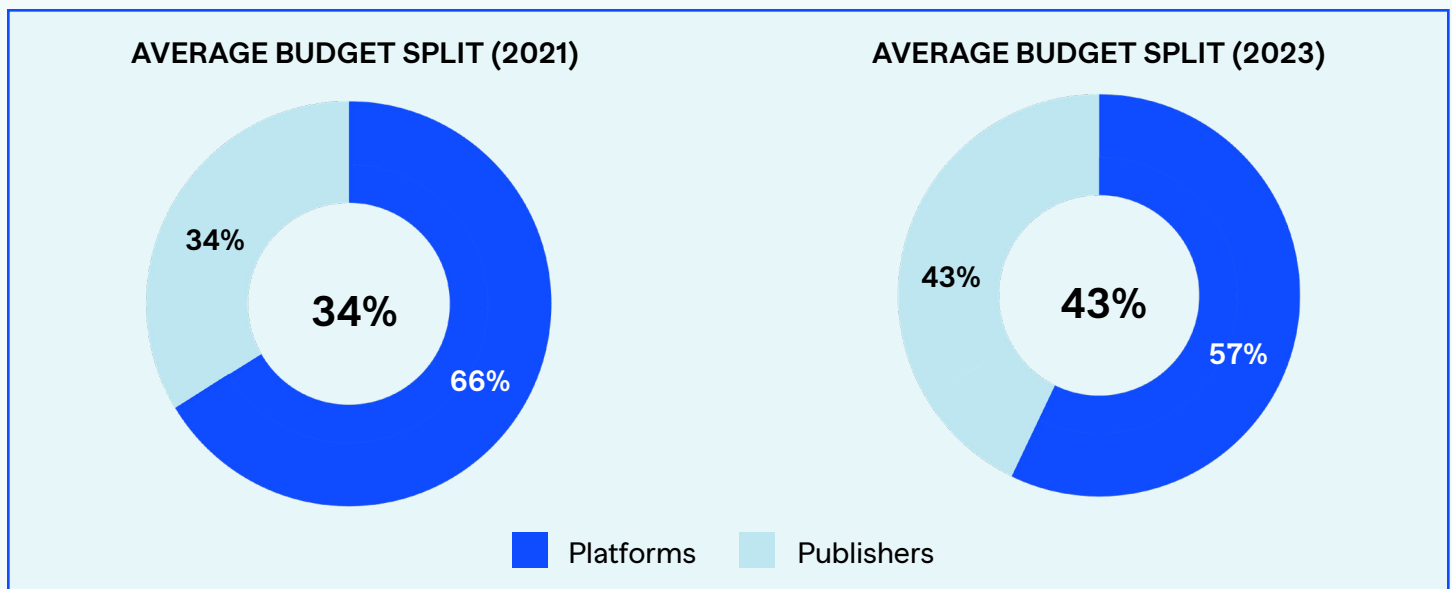
However, things are generally staying constant in terms of budgeting platforms vs. publishers. Only 23% of respondents will increase publishers' share of the total advertising budget. Most (45%) are staying put and some (33%) are even lowering publishers' piece of the pie in favor of platforms.

For those that are looking to increase publishers' share of the budget, the shift is significant. For this group (n=18 out of 80), the average publisher budget share increased from 34% last year to 43% next year, almost a 10-point difference.

## How much budget is being shifted between platforms and publishers?

The changes are very minor since most respondents are not shifting the budget between platforms and publishers. Overall there is a 1% shift in favor of platforms.

There is a greater change when looking at the respondents who are increasing publisher share (n=18). Here, there is a 9% shift in favor of publishers.



This increase is mostly coming from the brand marketing budget (83% vs. 17% direct response budget).

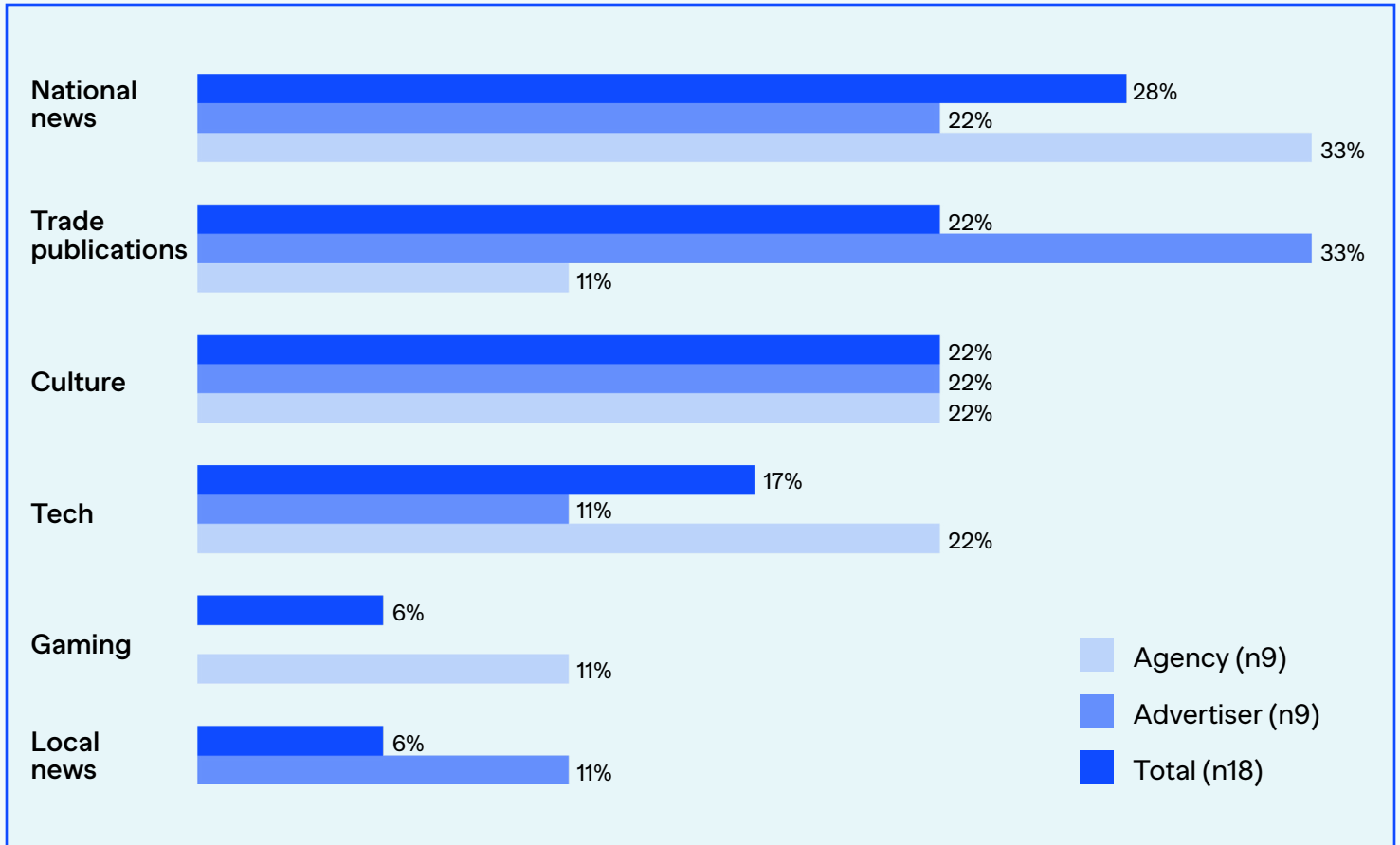
## What are the main drivers?

The main drivers of the shift from platforms to publishers are related to the ongoing privacy headwinds more than macroeconomic factors. Brand safety is also a main concern. The top 3 reasons identified by the respondents are:

- ① The shifting privacy landscape and deprecation of third-party cookies have made publishers' first-party data and contextual alignment more valuable (39%)
- ② Apple's App Tracking Transparency policy makes it more costly or difficult to advertise on social media platforms (22%)
- ③ We're concerned about brand safety and trust on social media platforms (17%)

## Which publishers are benefiting the most?

Publishers in National News, Culture, and Trade Publications will benefit the most from the increased publisher spend.



## Which advertisers are most likely to shift from platforms to publishers?

Based on the results, both brand-side advertisers and agencies are equally likely to shift from platforms to publishers. Among the group shifting from platforms to publishers, n9 were brand-side advertisers and n9 were ad agencies.

## Brand safety & trust

For respondents who are concerned about brand safety and trust, protection of user privacy/data and compliance with privacy/data regulations (such as CCPA, GDPR) are the most important and trustworthy attributes for publishers. For platforms, preventing their ads from being shown next to objectionable content is the most critical.

## Additional data

AD SPEND		
<ul style="list-style-type: none"><li>› Median 7% increase from past spend to future spend next year</li><li>› 55% of all respondents (n80) increasing total ad spend from past to future<ul style="list-style-type: none"><li>› 33% decreasing total ad spend from past to future</li><li>› 12% staying the same</li></ul></li></ul>		
PLATFORM VS. PUBLISHERS		
Publisher Spend	Publisher Share	Average Split
<ul style="list-style-type: none"><li>› 53% of all respondents (n80) increasing total spend on publishers from past to future</li><li>› 40% decreasing total spend on publishers</li><li>› 7% staying the same</li></ul>	<ul style="list-style-type: none"><li>› 23% of all respondents (n80) increasing publishers' share of the ad budget from past to future</li><li>› 33% decreasing publishers' share of the ad budget</li><li>› 45% staying the same</li></ul>	<ul style="list-style-type: none"><li>› Past: 66% Platform / 34% Publisher</li><li>› Future: 67% Platform / 33% Publisher</li></ul>

## Methodology

80 digital advertising decision-makers were surveyed from November 11 to November 15, 2022. 40 respondents were in agencies, and answering from the perspective of their largest accounts, and 40 respondents were in brands. 85% of respondents were Director-level and up. There was a natural distribution of industries covered, with the largest being retail and consumer goods, manufacturing, financial services, and media. 63% of respondents were enterprises with more than 1,000 employees.

All respondents passed NewtonX's standard 2-point identity verification process, ensuring that they were who they said they were. Numerous quality checks were also conducted to ensure the relevance of survey responses and the robustness of insights of the derived insights.

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