



2023 UK Media Budgets Flash Survey Results

November 2022

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Methodology

ISBA and Ebiquity have partnered on this Flash Survey to generate insights into the 2023 media budgeting cycles and the expected impact of recessionary market conditions.

We are thankful for the 59 validated responses, submitted by the UK brand leadership responsible for over \$1.5B in annual advertising spend. This provides a robust indication of expected actions taken by leading advertisers to mitigate risks involved with uncertain times ahead.

For questions about this initiative, please reach out to:

Bobi Carley | ISBA | bobic@isba.org.uk

Ruben Schreurs | Ebiquity | ruben.schreurs@ebiquity.com

The study included:

3 of the **top 10** UK advertisers

11 of the **top 50** UK advertisers



59

Total validated participants



£1.5B+

Total advertising spend*

*Nielsen, 2022



£25M

Average spend per participating brand



“Brand owners are sensibly positioning themselves for the anticipated recession by building more short term flexibility in their budget planning. But it is encouraging to see the commitment amongst many advertisers to maintain and even increase brand building activities. Evidence from past recessions demonstrates that brands which continue to invest for the longer term gain market share and emerge from the downturn faster and stronger.”

- Nick Waters, Ebiquity CEO



“The survey clearly shows the impact of recession on the spending plans of major brands. While there's a fine balance between the number intending to concentrate more on investment in brand and those spending more on performance, there's a general shift towards more flexibility of commitment and a significant swing towards digital delivery in every medium.”

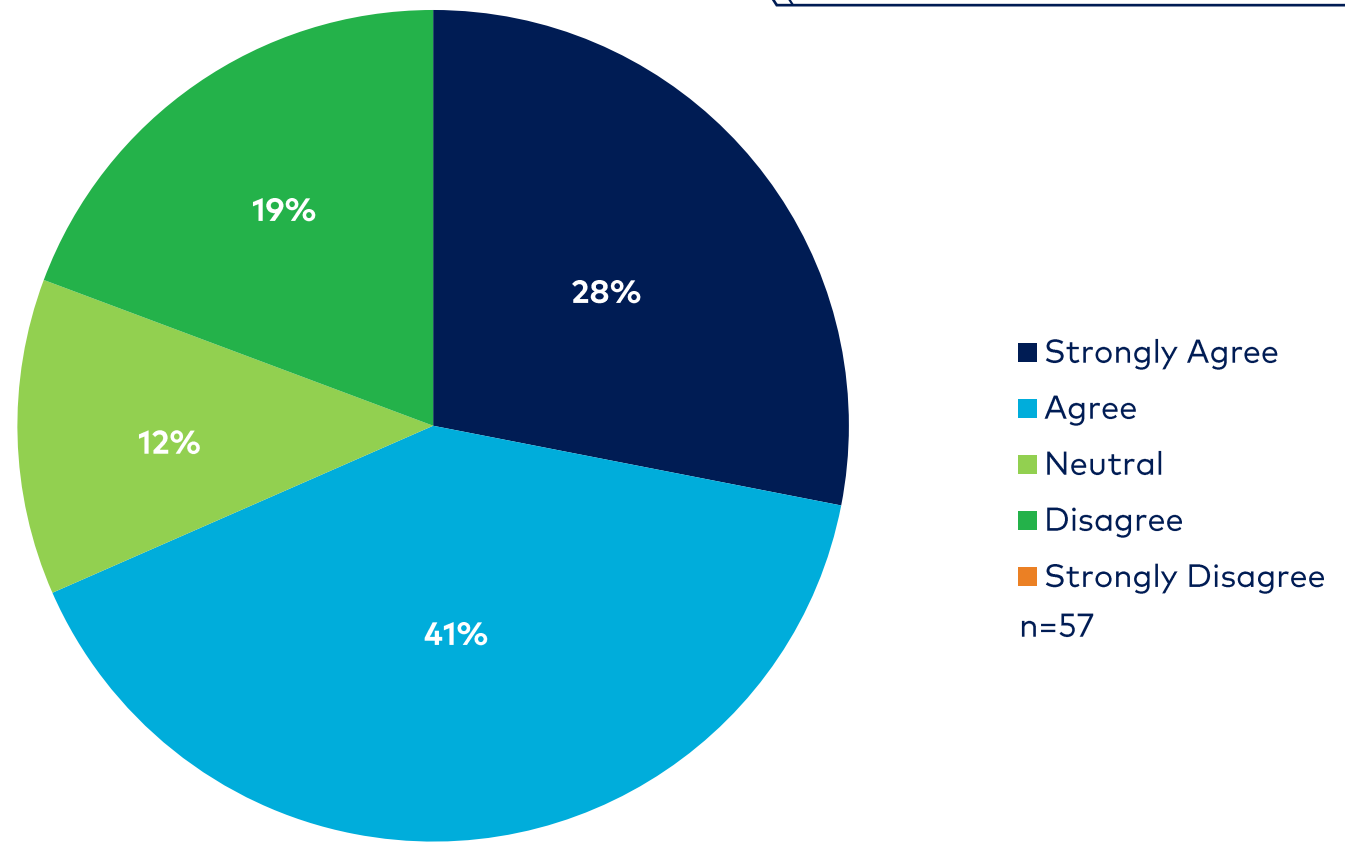
- Phil Smith, ISBA Director General



Is the
(looming)
recession
influencing '23
budget
decisions?

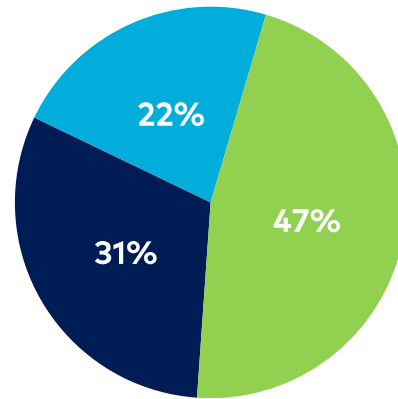
Recession impact on budget decisions

69% of respondents **agree** or **strongly agree** that their '23 budget decisions are influenced by the recession



Strategy and Buying shift (2023 vs 2022)

How will your mix of Performance and Branding change in 2023?



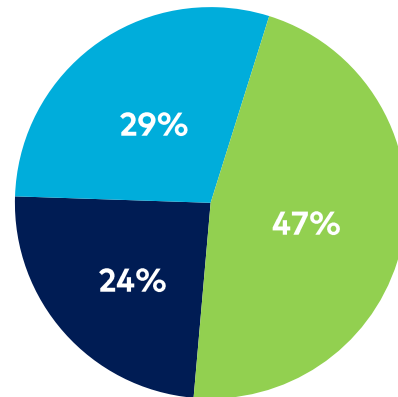
- Increase share of Branding
- Increase share of Performance
- Maintain 2022 Mix

n=58

31%

of respondents indicated they will **increase their share of Branding** in 2023

How will your mix of upfront media buying commitments and short-term flexible buying change in 2023?



- Increase share of upfront commitments
- Increase share of flexible/biddable buys
- Maintain 2022 Mix

n=58

29%

of respondents indicated they will **increase their share of flexible/biddable buys** in 2023



How do you expect your media channel investments to change in '23?

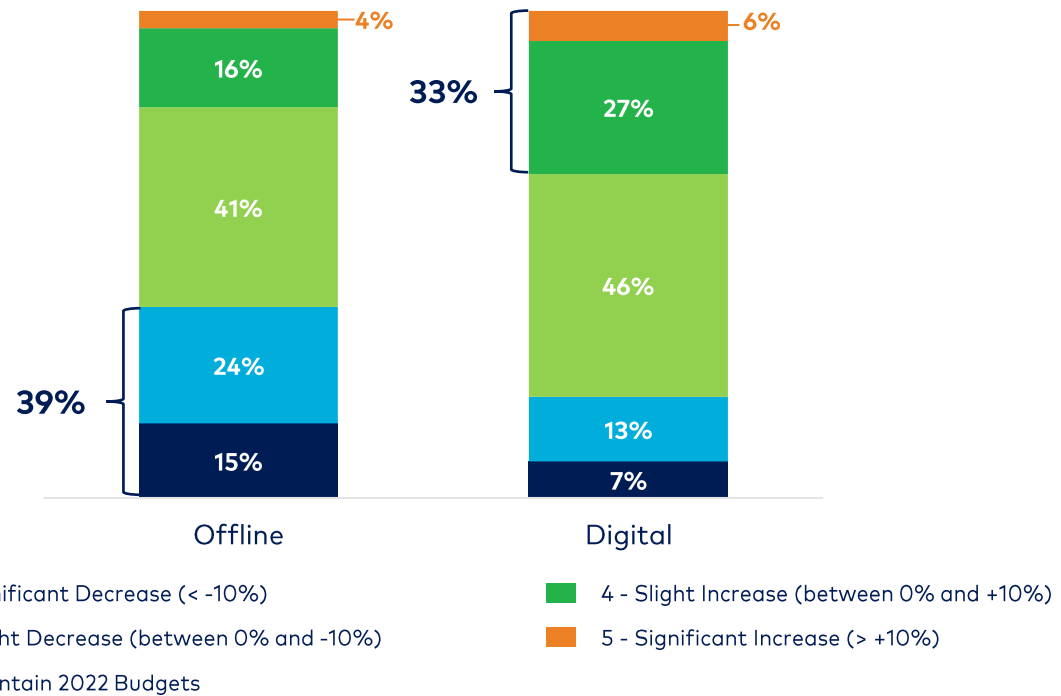
Media channel expectations (2023 vs 2022)

39%

of respondents will **decrease** their offline media budgets in '23

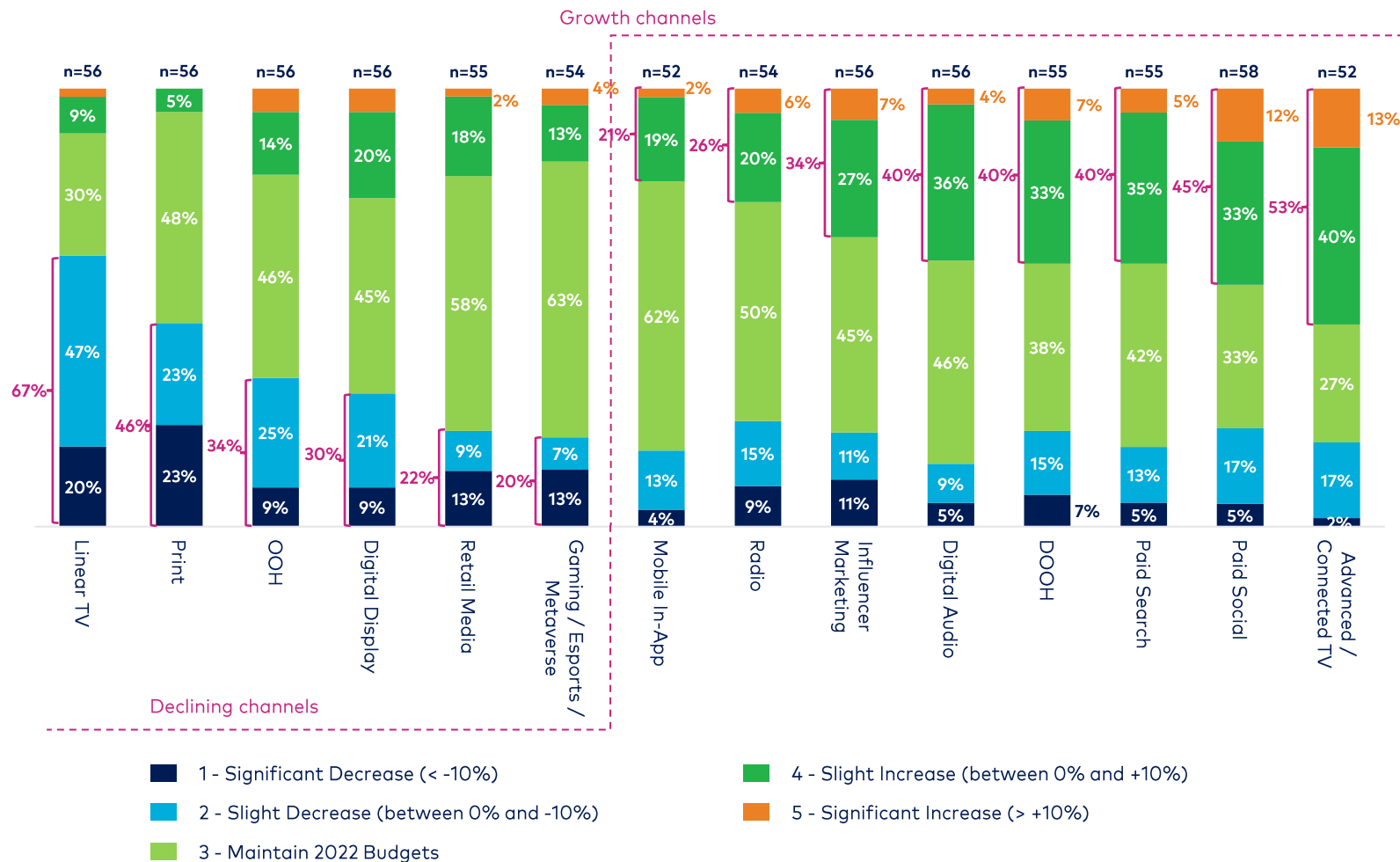
33%

of respondents will **increase** their digital media budgets in '23



How do you expect your media channel investments to change in '23?

Breakdown per channel





I S B A

ISBA is the only body that represents brand owners advertising in the UK. We empower them to understand the industry and shape its future because we bring together a powerful community of marketers with common interests; lead decision-making with knowledge and insight; and give a single voice to advocacy for the improvement of the industry.

Our purpose and principles
To create an advertising environment that is transparent, responsible and accountable; one that can be trusted by the public, by advertisers and by legislators.

**One
Voice**



Ebiquity is the world leader in media investment analysis

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We harness the power of data to provide independent, fact-based advice, enabling brand owners to perfect media investment decisions and **improve business outcomes.**

We are a data-driven solutions company helping brand owners drive efficiency and effectiveness from their media spend, eliminating wastage and creating value.

We provide analysis and solutions through five Service Lines:

- › **Media management**
- › **Media performance**
- › **Marketing effectiveness**
- › **Technology advisory**
- › **Contract compliance**

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Ebiquity plc - a company listed on the London Stock Exchange (AIM:EBQ)



Ebiquity is able to provide **independent, unbiased advice and solutions** to brands because we have no commercial interest in any part of the media supply chain.



More than **500 media specialists** operate from our 19 offices worldwide, covering **80% of the global advertising market.**



Ebiquity has the most comprehensive, independent view of today's global media market. We **analyse \$55bn of media spend from 75 markets** annually, including trillions of digital media impressions. Our Contract Compliance division, FirmDecisions, **audits \$40bn of contract value** annually. As a result, more than **70 of the world's top 100 advertisers today choose Ebiquity** as their trusted independent media advisor.