

White Paper

Let's get digital

Addressable TV advertising for SMEs





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Executive statement



Stéphane Coruble
CEO,
RTL AdAlliance



Dr. Oliver Vesper
Chief Digital Officer & Deputy CEO,
RTL AdAlliance

For any business, capturing the attention of target customers in today's fragmented media landscape is an ever-increasing challenge. Whether they're scrolling through social media, reading online articles, listening to the radio, walking along the street, or watching TV, potential customers are constantly encountering promotional messages. Their attention spans are short. And when we do have their attention, they expect personalised, relevant experiences and emotional connections, not just information about products and services they may not be interested in. This is a challenge for any business promoting its products or services, but it presents a particular challenge for SMEs with a narrower or local focus. They must choose the best advertising medium not only to reach and engage their potential customers with relevant, targeted messages that stand out from the crowd, but also to suit the budget and resources of their business.

Despite so many mediums now competing for customers' attentions, TV is still the most used medium in Europe,¹ and it is also one of the most trusted,² offering advertisers an opportunity for unparalleled reach in a premium, brand-safe environment. However, as shown by our exclusively commissioned research – presented in this white paper – it is commonly the most underutilised advertising medium among SMEs.

Many see TV advertising as too expensive, complex, or mass market for their business, and stick to mediums they perceive as more economical, easy to use, or regionally focused, such as print ads or online campaigns. But it is time for SMEs to update their perspective. Advances in technology and data gathering have transformed TV advertising from a domain reserved for large, nationally focused brands into an exciting opportunity for all businesses, whatever their size, budget, resources, geographical focus, ambitions, or target audience.

Made possible by the proliferation of smart TVs and more consumers watching online content, Addressable TV advertising is the delivery of targeted advertising into linear TV content streams. It means different households watching the same TV programme can be shown personalised ads based on their location, socio-demographic profile, interests, and viewing patterns – giving SMEs the power to literally talk to their neighbours.

Bringing the same data-driven targeting of online advertising into the premium TV environment, Addressable TV removes the geographical and financial barriers SMEs previously faced with TV advertising's traditional mass-market approach. By ensuring ads are only delivered to households that fit the targeting criteria – and have consented to receiving targeted ads – and by offering familiar, affordable display ad formats, it maximises relevance, ease of use, and cost-effectiveness. As Europe's leading total media sales company and experts in TV advertising solutions, we believe SMEs could see incredible results by showcasing their business on a trusted medium their customers use every day.



But we also understand the challenges SMEs face in adopting new ways to reach their customers, particularly when it comes to new technologies. In this white paper, informed by our research among German SMEs, we aim to empower SMEs – and the resellers that work with them – with the expert knowledge and real-life insight needed to embrace Addressable TV advertising. We will debunk the common misconceptions SMEs have about TV advertising and outline the benefits of Addressable TV for SMEs. We will show how it is working in Germany, which is just the first step towards our truly international offer. And we will introduce the tools and solutions, available through our SME Business division, that have been specifically built for SME advertising, in partnership with our tech provider smartclip, and enable resellers to run scalable, affordable campaigns for their SME clients.

Showcasing your SME clients' messages on TV screens in homes throughout Europe has never been so accessible, and our SME Business division is already seeing numerous SMEs successfully reaching customers with Addressable TV campaigns. We are excited to be your partner for this new opportunity and look forward to your clients making their on-screen debut very soon. ✕

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**Showcasing
your SME clients'
messages on
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so accessible.**

Executive statement



Fabian Burgey

Director SME Business Europe,
RTL AdAlliance

Any discussion on global or national ad spend will undoubtedly focus on big numbers, big companies, and big budgets. However, in Germany and around the world, there is another key player that makes an equally significant – but often unrecognised – contribution to ad spend, and that is the SME sector.

Forecasts indicate that ad spend worldwide will reach nearly US\$ 885 billion by the end of 2024.³ And three US companies, Google, Meta (formerly Facebook), and Amazon – companies commonly used by SMEs for advertising – accounted for 74% of global digital ad spend in 2021 and 47% of all ad spend in the same period.⁴ In Germany, annual advertising revenues are forecast to reach €36.1 billion by 2025,⁵ with annual ad spends from companies such as Procter & Gamble, Lidl, and Aldi reaching multiple millions.⁶

Obviously comparing, for example, the ad spend of Procter & Gamble with the ad spend of a local bakery is like comparing apples with oranges. We rarely see ad spends stretching into the multiple millions among individual companies in the SME sector. In the US, the average monthly spend on digital advertising by small businesses in 2021 was just US\$ 534,⁷ and our research among SMEs in Germany found that 52% spend under €1,000 on advertising per month.

With the SME sector's vast number of individual companies operating in all types of industries, getting valid data on actual SME ad spend – and, therefore, the sector's market volume – is enormously difficult. However, when we look at the sector as a whole, the numbers are far from small.

There are 33.2 million SMEs in the US, accounting for 99.9% of all US businesses.⁸ In Germany, there were approximately 3.3 million SMEs in 2020, accounting for 99.3% of all businesses.⁹ If each of the 3.3 million SMEs in Germany spent just €500 per month (similar to the previously mentioned US average) on advertising, this would add up to a combined spend of €1.65 billion – per month! This is, of course, a very rough estimate. Actual figures are not available, and the companies mentioned (Google, Meta, Amazon) that SMEs often advertise with are extremely reluctant to disclose data to the public – for these companies, the term 'walled garden' is a serious corporate philosophy. But it is clear the small ticket sizes of SMEs have the potential to add up to a significant portion of the market. And this market is growing. In 2015, a US study by BIA/Kelsey advisory services, experts on the business of local marketing and advertising, predicted that the SME share of location-targeted ad spend alone in the US would rise from 11% in 2016 to 33% in 2021.¹⁰

When it comes to TV advertising, despite its significant potential spending power, the SME sector has, until now, been something of a 'lost world'. The SME advertising market is extremely heterogeneous and diverse, and from a platform or inventory perspective, it is driven by the three US companies mentioned. For decades, it has been almost impossible for SMEs to advertise in the TV environment and, therefore, for broadcasters to gain revenue from this sector. This is due to a variety of reasons, which can differ by country. Many SMEs operate on a regional or local level, so national advertising is simply not a viable choice. Advertising rates on linear TV would also exceed most SME budgets. The rate for a 30-second TV ad varies depending on the commercial break and the month, but in 2020, the average in Germany was around €18,300¹¹ – far beyond the average spend of SMEs. Moreover, classic TV is a one-to-many medium, which can lead to scatter loss for SMEs.

The game-changing breakthrough for TV advertising and the SME sector came with a new type of technology – Addressable TV. The first Addressable TV campaign was introduced by smartclip in 2014,¹² and it was a revolution and milestone in TV history. TV went digital – and now, with the granular targeting, dynamic delivery, and automatic processes of Addressable TV advertising, SMEs finally have an opportunity to make their mark on TV advertising.

Our SME Business unit launched in 2020, and I am very proud to have built this dedicated division within the RTL group alongside our fantastic colleagues at smartclip and RTL AdAlliance, and especially with our specialised SME team, without whom our continued

expansion would not be possible. In 2020, we – as part of a leading European broadcaster – presented our first internal strategy paper on the SME market and how to tap into an environment that has been largely occupied by the dominant US companies. Now, we are delighted to publish our first external white paper that puts the spotlight on our brand-safe, trackable, and easily accessible TV advertising solutions for SMEs and resellers in Germany and soon in Europe.

We are honoured to finally offer an opportunity for SMEs to advertise on TV, and we hope you will join us in harnessing the incredible potential of Addressable TV advertising. ✕



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With the granular targeting, dynamic delivery, and automatic processes of Addressable TV advertising, SMEs finally have an opportunity to make their mark on TV advertising.

Introduction

Media headlines might focus on the large multinationals, but it is SMEs that dominate the business landscape. SMEs represent a huge 99% of all businesses in the EU,¹³ and they employed almost 84 million people in 2021.¹⁴ The value that SMEs add to each country's economy varies across the EU – in Germany, 82% of value added to the country's economy comes from SMEs, and across the EU, the average value that SMEs contribute to the economy is around 56%.¹⁵ SMEs provide goods, services, and jobs that are vital to the population and local communities, and they are essential sources of innovation and creativity.

However, SMEs often have an uphill struggle when it comes to building a brand and generating sales. They have myriad demands on their limited time, resources, and finances; their customers' attentions are scattered wider than ever before; and they also face the ongoing challenges of digitalisation. Their customers are bombarded with advertising messages across multiple mediums on a daily basis, so how can SMEs optimise their advertising efforts and not only find their target customers but also grab the attention of those customers with relevant, customised messages, all within budget? SME advertising has evolved rapidly in recent years, with digital technologies and data collection bringing a new level of automation, reach, and targeting capabilities. Many SMEs are already utilising online advertising, integrating campaigns on channels such as Google Ads or Facebook Ads into their advertising strategies. But many are unaware of the potential of a more recent arrival that brings the same tech-driven and data-driven advantages to a medium their customers watch every day.



Advertiser: Georg Frauendorfer GmbH & Co. KG
Agency: Schlitzer, Koch & Partner Werbeagentur GmbH
Broadcaster/Channel: Sport1

Addressable TV delivers targeted advertising within linear TV content streams, combining the granular targeting and measurement capabilities of online advertising with the trusted, brand-safe environment of TV. Research shows that TV ads continue to have the strongest and longest-lasting impact on viewers,^{16,17} and that TV, regardless of device, drives more sales uplift than any other video platform.¹⁸ Despite the proliferation of viewing devices, the TV set also continues to be a household favourite for everyday viewing – the recent New Life of the Living Room study (commissioned by RTL AdAlliance, smartclip, and Ad Alliance Netherlands), which looks at video consumption habits

in European households, showed that 77% of Europeans watch video content on a TV/smart TV every day or almost every day.¹⁹ And Addressable TV turns this premium, high-performing medium once reserved for big, mass-market brands into one that brands of all shapes and sizes can use to reach their customers. SMEs can talk directly to their neighbours and target customers using affordable display ad formats delivered to relevant households automatically via adtech (advertising technology) platforms. In addition, Addressable TV ads are only delivered to households that have actively consented to receiving them,

removing any data safety concerns. Addressable TV removes the geographical or financial barriers to TV advertising that SMEs previously faced, and it presents an exciting alternative to the current 'walled garden' offerings from US platforms such as Google, Apple, Facebook, and Amazon (GAFA). As more and more consumers choose to watch their TV content via internet-enabled smart TVs – and more broadcasters react to this shift by adapting their advertising offerings – Addressable TV provides an effective solution to the problem of how SMEs can reach and engage with today's consumers. Yet, many SMEs continue to disregard TV advertising as being too expensive or nationally focused. Many have also not heard of the new technologies available or do not fully understand them or their potential.

RTL AdAlliance sets out to change this outdated perspective with this new white paper. Alongside providing a unique SME-focused look at advertising and Addressable TV, gained through exclusive commissioned research among SMEs in Germany, the paper will unravel Addressable TV, how it works, and the misconceptions that surround it. It will look at the benefits SMEs stand to gain from incorporating Addressable TV into their advertising strategies and provide real-life insight through case studies and interviews with experts. Before concluding with the key recommendations and key takeaways on this new advertising opportunity, both for SMEs and resellers, it will also look at the tools and solutions offered by RTL AdAlliance's dedicated SME Business division, in partnership with RTL Group adtech provider smartclip, which are all specifically designed to aid resellers in delivering effective campaigns for their SME clients.

As technology evolves and customers' expectations shift, making informed decisions on marketing and advertising is more business critical than ever for SMEs looking to minimise risk and maximise results. This comprehensive insight will ensure that both SMEs and the resellers working with them can leverage the Addressable TV solution without stepping into the unknown. ✕

SME:

small- or medium-sized enterprise with fewer than 250 employees.

Addressable TV:

targeted video or display advertising within linear TV content streams.

99%



of all businesses in Europe are SMEs.²⁰

77%



of Europeans watch video content on a TV/smart TV every day or almost every day.²¹

RTL AdAlliance research

To obtain a deeper understanding of the SME perspective on not just Addressable TV advertising but also advertising as a whole, RTL AdAlliance commissioned exclusive research among SMEs in Germany, the current key market for the company's SME Business division. This quantitative research, carried out by Norstat Deutschland in June 2022, saw 581 participants from German SMEs answering a variety of questions. The key findings of this research are threaded – and addressed – throughout this report.

As can be seen from the profiling questions in this section, the SMEs participating represented a broad spread of industries, incomes, and sizes, with the majority located in five regions in Germany.

Research methodology

Quantitative research was carried out by Norstat in June 2022 via online questionnaires completed in Germany. A total of 581 SME decision makers answered up to 22 questions. The sample selection was based on company revenue or, if revenue was not known or provided, the number of employees. The segments were defined as follows:

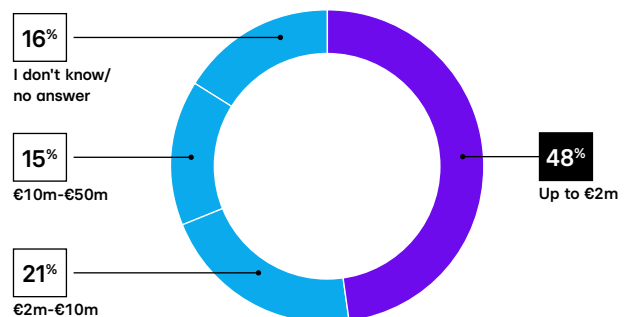
- Small enterprises: less than 10M€ revenue or fewer than 50 employees.
- Medium enterprises: 10M€ to 50M€ revenue or 50-249 employees. ✕

RTL AdAlliance research: profile of respondents

No. of respondents: 581

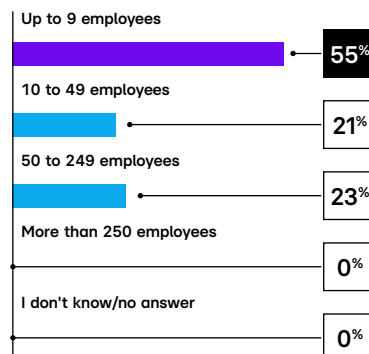
How much revenue per year does your company generate?

Almost half of German SMEs who answered the survey generate an income of up to €2m per year.



How many employees does your company have?

Over half employ fewer than 10 people and almost a quarter employ more than 50 people.



Advertiser:
Gemeinnützige Wohnstätten-
genossenschaft Hagen e.G.
Agency:
Schlitzer, Koch & Partner
Werbeagentur GmbH
Broadcaster/Channel: RTL

ANZEIGE
DATENSCHUTZ
**FREIRAUM
FÜR JUNGES
WOHNEN**





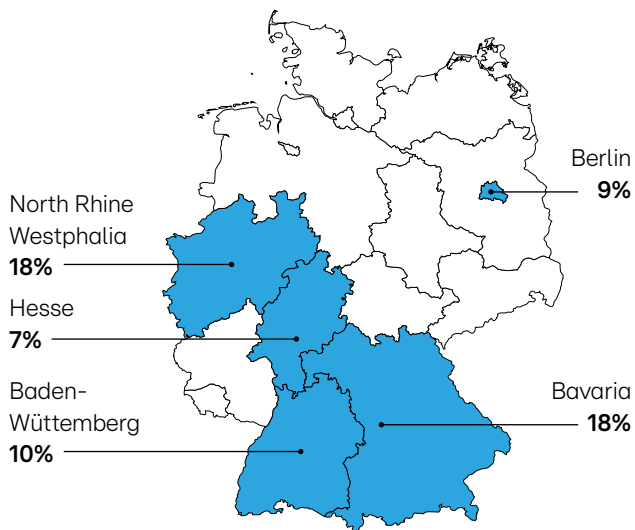
WWW.GWG-HAGEN.DE
**speziell für Azubis
und Studenten**

**1,50
Euro/m²**

**z.B. 50 m²
für € 75,-**
+ Betriebs- und
Heizkosten

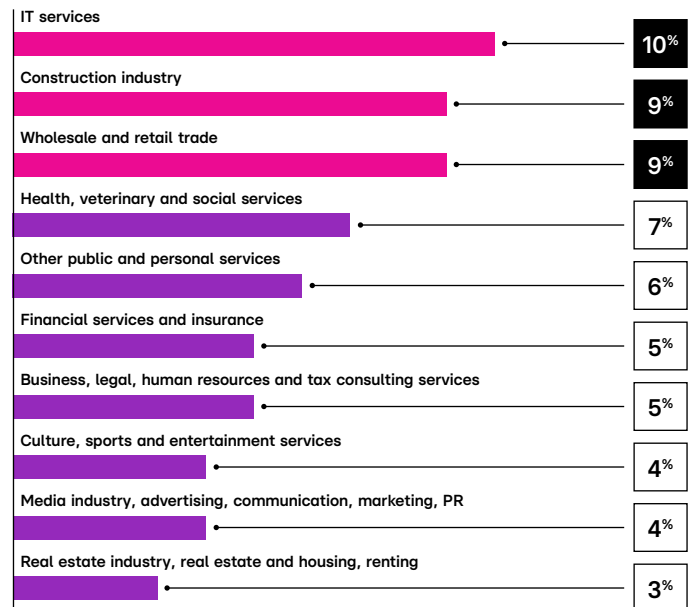
In which region/federal state is your company located?

The majority of respondents (62%) were located in five regions.



In which industry does your company operate?

The highest percentages of respondents were from companies operating in IT services (10%), the construction industry (9%), and wholesale and retail trade (9%), with the top ten industries representing 62% of respondents.



SMEs: a closer look

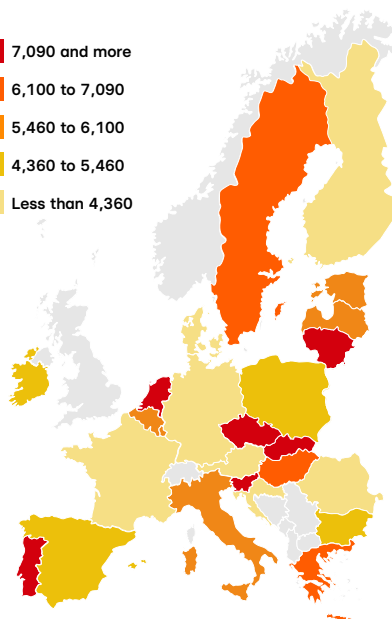
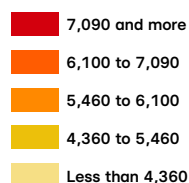
Before taking a look at Addressable TV and how it can work for SMEs, it is important to get a perspective on the SME landscape in Europe as a whole and also specifically Germany. From micro-sized businesses with up to nine employees to medium-sized businesses with up to 250 employees, SMEs represent 99% of businesses in Europe as a whole²² and 99.3% of businesses in Germany.²³ As can be seen from the breakdown of SME business types shown on the right, micro-sized businesses (businesses with up to nine staff) dominate in both Europe and Germany, representing a large proportion of total SMEs.

Although SMEs in Germany add 82% of value to the total economy, compared with around 56% in Europe as a whole,²⁴ SME density (the number of SMEs per 100,000 inhabitants) is lower in Germany than in other EU member states. Compared with the EU average of 5,103 SMEs per 100,000 inhabitants in 2021, Germany had an estimated 3,032 SMEs per 100,000 inhabitants.²⁵ This is significantly lower than other EU countries such as the Czech Republic (9,916 SMEs), Slovakia (9,106 SMEs), and Portugal (8,964 SMEs), indicating the even higher potential in other EU countries of an advertising solution tailored to the requirements of this prevalent business type.

Looking at SME density in Germany itself, figures in 2020 showed that, at 5,287 per 100,000 inhabitants, Hamburg had the highest density of SMEs of all the country's city states, while Bavaria topped the non-city states with an SME density of 4,538.²⁶

SME density in Europe in 2021 (estimate)

SMEs per 100,000 inhabitants



SMEs in Europe

21,633,373 micro
(up to nine employees)

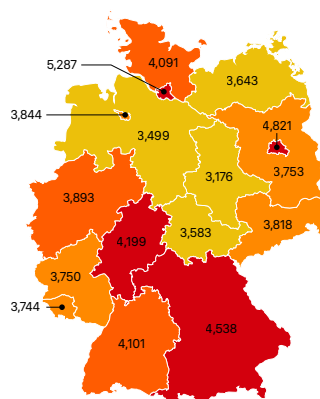
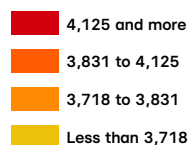
1,350,749 small
(10-49 employees)

206,592 medium
(50-249 employees)²⁷

3.3m
SMEs in Germany

SME density in Germany in 2020

SMEs per 100,000 inhabitants



2,881,296 micro
(up to nine employees)

383,712 small
(10-49 employees)

86,266 medium
(50-249 employees)²⁸

ANZEIGE
DATENSCHUTZ

**STARKE
MARKEN
ZUM BESTPREIS**

SELF
BENZ
brühl
DICK

Hier den
neuen
Prospekt
anschauen

GO.WOHNPARC.DE/BP-DICK

freistil
ROLF
BENZ
brühl
WOHNPARC
DICK
D-79787 Lauchringen
WOHNPARC-STUMPP.DE

Although SMEs come in all shapes and sizes – and they can often have a national or international reach – some key defining characteristics are common across a wide range of SMEs and distinguish them from large enterprises:²⁹

- SMEs tend to operate in a geographic and product niche, with limited diversification.
- SMEs have limited access to resources, including access to finance, expertise, skills, and human resources.
- SMEs are often owned and managed by the same person, and consequently depend on the ambitions, beliefs, and values of the owner-manager.
- SMEs have limited influence on the wider business environment (for example, through lobbying or advocacy activities) and supply chains.

These characteristics impact many of their business decisions, including their advertising strategies and the finances and resources they choose to dedicate to them. For example, SMEs operating in a very niche area – such as a local restaurant/retail outlet or a business providing only one specific product/service – will not want to waste finances and resources on advertising to people that either cannot get to their location or will never be interested in their product/service. Equally, SMEs operating in a limited geographical area will benefit from tech-driven advertising solutions designed to help them stand out as the 'local hero' for their products/services, particularly in areas where SME density is high and there is extensive competition from other similar

businesses located in the same area.

SMEs with limited access to technical expertise may be slow – or reluctant – to digitalise their operations or embrace new tech-focused opportunities to reach their target customers. Micro-sized businesses (businesses with up to nine employees), which form the majority of SMEs, may only have one owner-manager or one employee responsible for their entire marketing/advertising operations, so there may simply not be enough time to explore new advertising avenues.

However, while these characteristics can create challenges, the small size and niche focus of SMEs means they are often closer to their customer in comparison to larger organisations that have limited direct contact with the people buying or using their product or service. SMEs are therefore more in tune with the needs of their target customers; they know their demographics, behaviours, and interests, and how and where to engage with them effectively. The less corporate nature and fewer management layers of SMEs also means they can be more agile than larger organisations when it comes to adapting to change and adopting new technologies – providing they can access the support they need. →

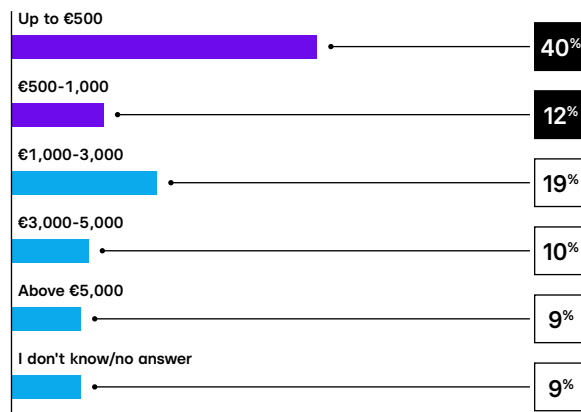
Maximising the marketing budget

Many SMEs have limited budgets for marketing and advertising. Just under half (48%) of the research respondents generate a yearly income of up to €2 million. As the rule of thumb says that about 3%-7% of sales should be invested in marketing,³⁰ a yearly income of up to €2 million equates to between €60,000 and €140,000 a year. However, that marketing budget is spread very thinly. As well as advertising and media costs – the actual costs of buying the advertising space – the budget also needs to cover staffing, design, external agencies, technology, promotion, rights, fairs, events and much more. For example, if 10% of the marketing budget is allocated to advertising and media costs, this would work out to between €6,000 and €14,000 per year – just €500 to €1,166 per month.

During the research conducted in Germany, more than half (52%) of respondents stated that they spend less than €1,000 a month on advertising. With such a small budget, the vast majority also choose not to employ the services of an external agency and manage most of their marketing budget themselves, although some bring in external expertise and collaborate with an agency to manage part of their budget. With advertising and media costs being such a small part of their possible total marketing expenses, SMEs need to maximise their budgets and choose advertising methods that will not only deliver a strong return on investment (ROI) but will also bring the SME-specific tools and tech solutions that allow campaigns to be run with minimal resources and staffing.

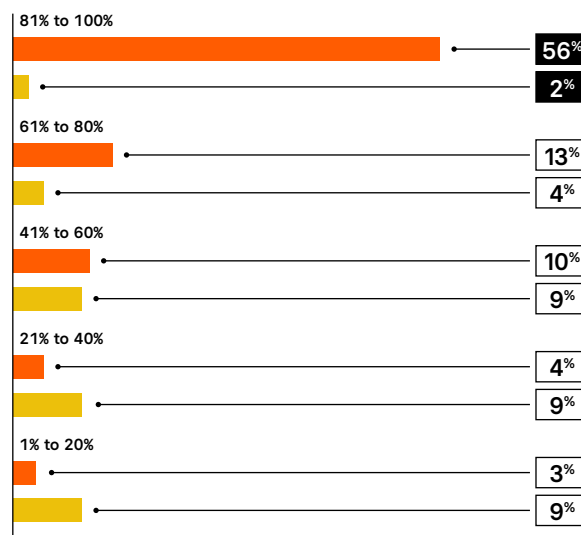
How big is your company's monthly advertising budget?

Most (52%) spend less than €1,000 on advertising per month, indicating a need for value for money and high ROI on their advertising budgets.



What percentage of your marketing budget is managed directly and how much through a media agency?

Most German SMEs manage their marketing budget directly, but some of them choose to collaborate with an agency to help them manage part of their budget.

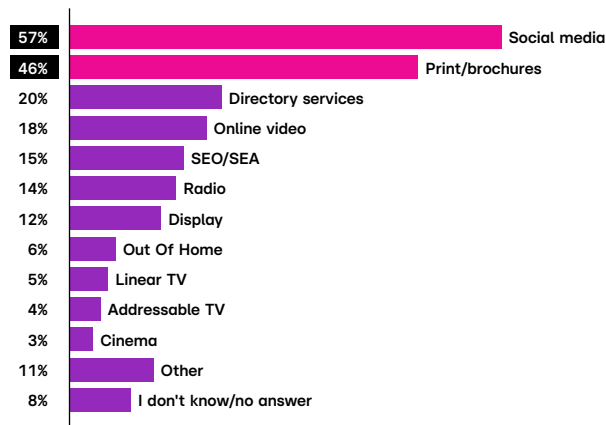


■ Directly managed
■ Agency managed

German SMEs use a variety of advertising channels, but their small budgets mean they are often limited to specific channels they feel are more cost-effective and easy to use. Many use online advertising, with 57% listing social media as one of their top three advertising channels, and more than half use Google (60%) and Facebook (53%). However, 46% still rely on print/brochures as a primary way to reach their customers. Only 9% included TV in their three primary advertising channels.

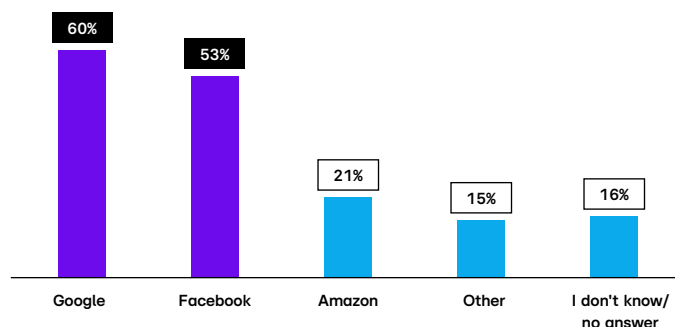
What are your three primary advertising channels?

Most German SMEs (57%) use social media as a primary advertising channel, with 46% using print/brochures. Only 9% list TV advertising as a primary channel, with 5% including linear TV advertising and 4% including Addressable TV advertising.



Which online platforms do you use?

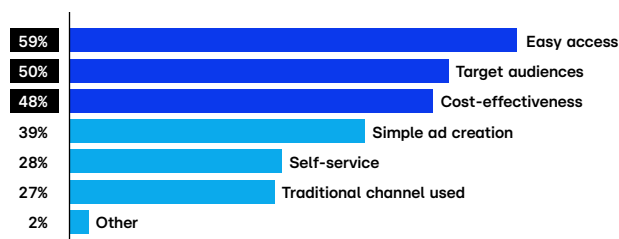
Google and Facebook are the most popular online advertising platforms for SMEs, used by 60% and 53% respectively.



When choosing which channels to advertise on, 59% of German SMEs wanted easy access and 48% wanted cost-effectiveness, highlighting the need to address the common misconceptions that Addressable TV is too complex or expensive. Many (50%) want advertising that can reach their target audience, a quality that is the central element of Addressable TV advertising. →

What are the key reasons to advertise on these platforms?

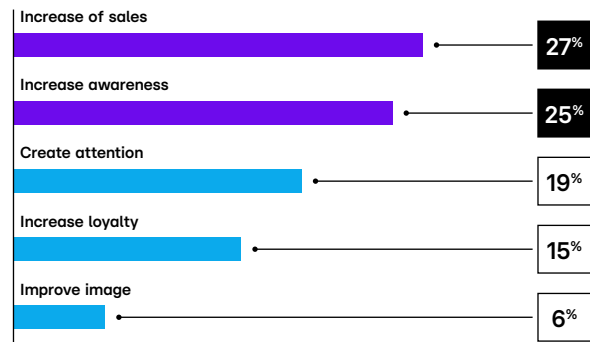
German SMEs are looking for an easy-to-access, cost-effective advertising solution that allows them to reach their target audience.



The primary advertising objectives of many German SMEs include increasing sales (27%) and increasing awareness of their brand (25%), and they use multiple ways to measure how effective their campaigns have been in achieving these goals. Although many utilise online measurements such as total website traffic, average per page visit, and ad click-through-rate (CTR) to measure the impact of their campaigns, the most popular method SMEs use is simply how many customers contact them after seeing their ad.

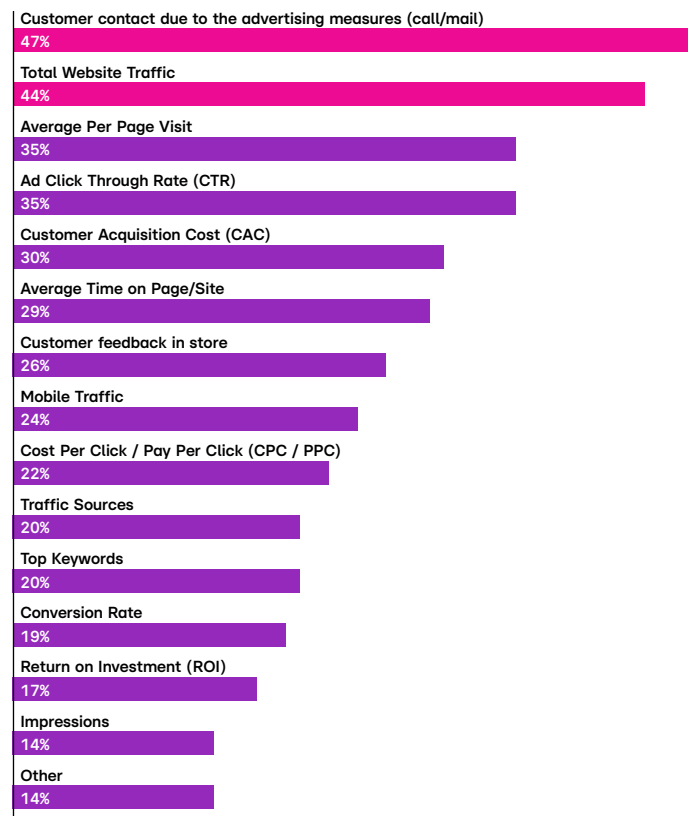
What is your primary advertising objective?

Many SMEs look to advertising as a way of increasing sales (27%) and increasing awareness of their brand (25%).



Please rank the top five ways you measure your advertising efforts.

German SMEs rank the effectiveness of their advertising efforts in multiple ways, with the most popular including how many customers contact them having seen their ads (47%) and total website traffic (44%).



Barriers to digitalisation

With their customers operating in an increasingly digital-focused world, the digitalisation of their own business activities has become increasingly essential for SMEs looking to maintain efficiency and competitiveness, to become more productive, and to enhance the customer experience. New technologies such as Addressable TV offer new opportunities to reach customers in an effective, targeted way; however, SMEs tend to lag behind when it comes to adopting new technologies.

SMEs that have not yet digitalised any of their activities and SMEs with very limited digitalisation cite a number of reasons for this, including lack of required skills, lack of internal financial funds, lack of access to finance, lack of public financial support, and ICT (information and communication technology) infrastructure issues in rural areas.³¹

Many SMEs have a website³² and use social media,³³ but the smaller the firm, the less likely they are to adopt digital-enhanced business practices.³⁴ It is therefore important to give SMEs access to the tech solutions and expertise they lack in-house. Guidance from external sources such as specialist resellers can help to simplify tech-driven advertising methods they may initially perceive as too complex and can help them to understand how they can work for their business. ✕



Advertiser: Apeiron restaurant & retail management GmbH
Agency: Knorrwerbung GmbH
Broadcaster/Channel: RTL

Digitalisation:
the use of digital technologies and of data (digitised and natively digital) in order to create revenue, improve business (not just processes) and create a digital culture whereby digital information is at the core.³⁵

Addressable TV advertising: the basics

What is Addressable TV advertising?

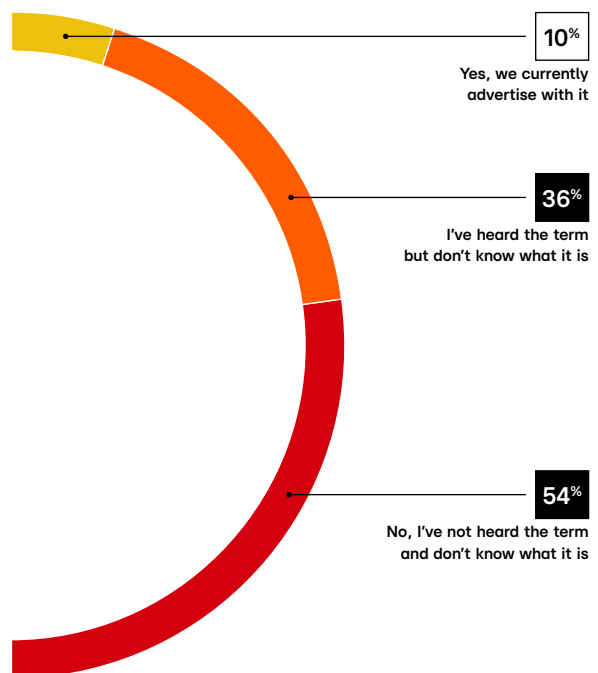
Research among German SMEs found that 90% of respondents did not know what Addressable TV advertising was, and over half (54%) had not even heard of the term. However, it is likely that anyone who lives in a location where Addressable TV is available and who watches TV content on a smart TV will have already seen an Addressable TV ad, even if they were not aware of it or did not know how it worked. This low awareness shows the significant untapped potential of Addressable TV advertising in the SME market and highlights the need to provide SME-specific insights and tools that will enable resellers to harness this potential.

RTL AdAlliance research

No. of respondents: 581

Do you know what the term Addressable TV means?

Over half (54%) of SMEs surveyed had not heard of the term Addressable TV and did not know what it was, and 36% had heard of the term but did not know what it was. Only 10% are currently using it.



For the purposes of this paper, Addressable TV, in the simplest terms, is defined as targeted video or display advertising within linear TV content streams. Real-time ads can be targeted on a one-to-one device-level basis, so different households watching the same TV programme are shown personalised ads according to specific criteria, such as demographic profile, viewing behaviour, interests, and location. An innovative, technology-driven approach, Addressable TV combines the high-quality, brand-safe scale of TV advertising with the granular targeting and measurement capabilities of digital marketing.

Advertisers can also choose from a variety of familiar video or display ad formats depending on their budget or media resources. These include video ads that appear within the regular ad break or when viewers switch to a new channel and non-video display ads that appear as banners around the live content or when the viewer first turns the TV on.

Detailed information on how Addressable TV advertising works can be found in smartclip's recent Addressable TV (ATV) Advertising 2022 white paper, a link to which is provided in the references.³⁶ Addressable TV is made possible by consumers' continuing shift towards watching content via internet-enabled smart TVs, the use of which has been widely adopted throughout Europe – 79% of European households now connect their TV to the internet,³⁷ and 37 million addressable devices are available in Europe via RTL AdAlliance partners.³⁸ →

Addressable TV:

targeted video or display advertising within linear TV content streams. Real-time ads are targeted on a one-to-one device-level basis, so different households watching the same TV programme are shown personalised ads according to specific criteria, such as demographic profile, viewing behaviour, interests, and location.

Addressable TV allows SMEs to target households with ads that are specifically relevant to the people within those households.

37m

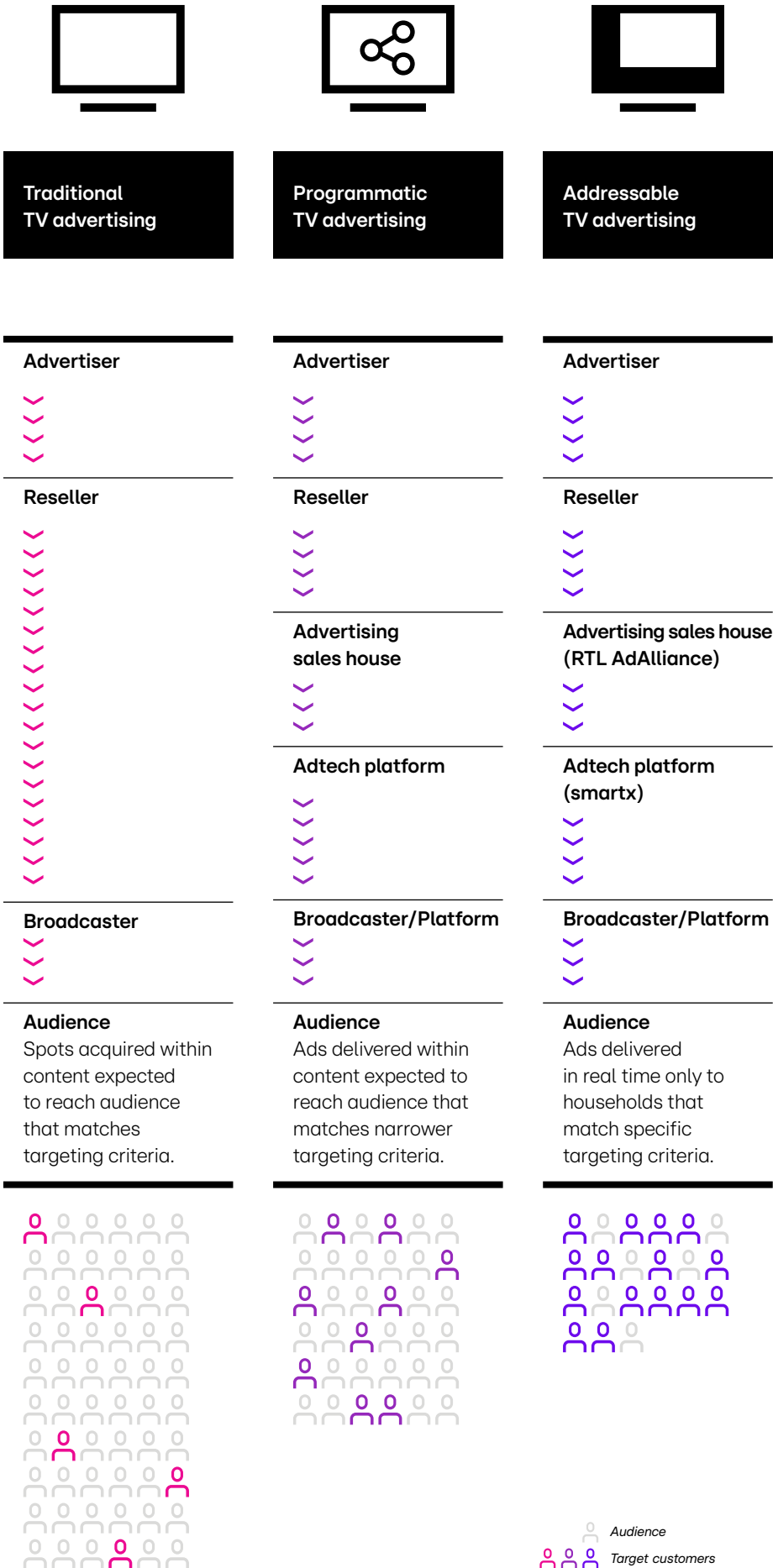
addressable devices available in Europe via RTL AdAlliance partners.³⁹

Mass to niche: the TV targeting evolution

Traditional TV advertising takes a 'one-to-many' mass-market approach. Agencies manually buy ad spots using limited age and gender targeting based on the likelihood of who will be watching that content at that time (for example, men aged 18-25). This approach can build brand awareness, but only a small proportion of that mass audience will be the actual target customer. Plus, with audiences now fragmented across multiple channels, advertisers would need to buy ads on multiple channels to reach the large audience this broadly targeted approach depends upon.

More recently, technologies such as internet-enabled smart TVs, set-top boxes, and adtech platforms led to the arrival of Programmatic TV advertising. With Programmatic TV comes the ability to automate the process of buying, selling, and serving TV ad impressions via adtech platforms – similar to the processes used in other forms of online advertising. This allows advertisers to automatically buy targeted ad spots based on who is predicted to be watching that content. Addressable TV advertising takes that one step further – delivering targeted ads in real time based on who is actually watching. Using adtech platforms – such as smartclip's smartx platform⁴⁰ – and available data, ads are only served on a 'one-to-one' basis to the devices or households that match specific targeting criteria, which can be based on a range of information about the viewer, and advertisers can also choose from a range of affordable video or display ad formats. As can be seen in the case studies provided in this paper, Addressable TV advertising is being used by all types of companies from sole traders to larger franchise-based businesses.

Addressable TV can be described as TV advertising that buys the audience not the content. Relevant ads reach relevant consumers no matter what device they are watching on or what show/channel they are watching. This data-driven, personalised approach and variety of ad formats is similar to the offerings from the US platforms (for example, GAFA), which many SMEs are familiar with, and it means TV ads now offer more value to advertisers and more relevance to consumers.



What does Addressable TV advertising look like?

Until recently, TV advertising was restricted to businesses that had the budget and resources to produce glossy 30-second video ads. Video ad format options – for example, the ATV Spot – are still available via Addressable TV advertising, but it also offers a wider, more accessible range of ad types, including non-video formats such as banners that surround the live content when the viewer switches to a new channel or mastheads that appear when the TV is first turned on. This gives businesses with smaller budgets or fewer resources the ability to access TV advertising without the need to invest in brand-new or prohibitively expensive ad materials. Ad formats available through Addressable TV advertising are outlined here. One of the most popular ad types used by SMEs is the L-banner or SwitchIn XXL format (also known as Lanner, L-banner in-program, and Digital Skin).

Video

ATV Spot

The fully flexible substitution of video ads within the regular TV ad break. Targeted video ads can seamlessly replace the linear ad or the channel's content promo/trailer. The original ad or promo/trailer is overlaid with the Addressable TV ad – so relevant households see the Addressable TV ad, and non-relevant households still see the original content. Messages can be tailored to target audiences using real-time data on who is watching, and extra information can be added, such as time-sensitive promotions.

Currently available in Germany and Spain.



SwitchIn Spot & Bumper

Video ads – available as full-length videos or as shorter bumper ads – that are shown to target households when they change channel. Appearing separately to the regular ad break, the video ad is surrounded by an L-shaped frame (L-banner) that features the channel branding and a countdown indicating the time remaining until the programme continues.

Currently available in Germany.



Display

L-banner/SwitchIn XXL

(also known as Lanner, L-banner in-program or Digital Skin)

One of the most popular forms of Addressable TV advertising, L-banners are non-video ads that are inserted directly into the live linear broadcast stream, not in the regular ad break. They are shown when the channel is changed and surround the live content in an L shape. Providing high visibility with content covering 40% of the screen, L-banners can be static or animated and can include call-to-action elements that direct viewers to further information, such as a website address.

Currently available in Germany, Austria, Spain, Italy, and France.



Zoom

(also known as SwitchIn Zoom and Side-Skin)

Similar to the L-banner, the Zoom ad format appears within the live content stream as a larger, C-shaped branded area covering 50% of the screen. The banner can feature static images, animation, and call-to-action elements.

Currently available in Germany, Austria, Spain, and Italy.



Masthead

(also known as SwitchIn Masthead and Full-Skin)

This display ad appears when the viewer turns on the TV for the first time each day. It surrounds the live content for 10 seconds and can be used to highlight current information or news to targeted viewers. Taking up 50% of the screen, the ad can feature static images, animation, and call-to-action elements.

Currently available in Germany, Austria, Spain, and Italy.



The SME perspective on Addressable TV

Addressable TV is still a relatively underutilised medium by SMEs. As outlined earlier, the research showed that only 4% of respondents included it among their three primary advertising channels, 90% of respondents did not know what it was, and over half (54%) had not even heard of the term.

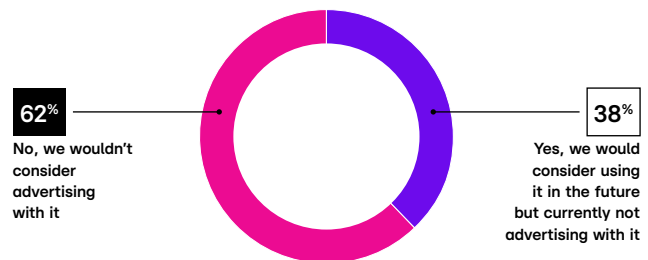
When those who did not know what Addressable TV was were asked whether they would consider using it as an advertising channel in the future, 38% said they would consider using it (after being introduced to the concept). Among those who said they would not consider using it, reasons cited included it being too expensive (22%), not needed (17%), or not relevant for their industry target group (14%).

RTL AdAlliance research

No. of respondents: 525

Would you consider using Addressable TV as an advertising channel in the future?

Among those who did not know what Addressable TV was, 38% would consider using it (after being introduced to the concept).

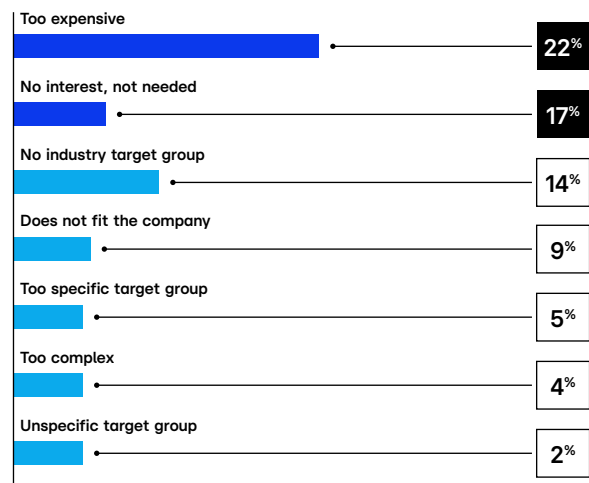


RTL AdAlliance research

No. of respondents: 328

If you are not considering Addressable TV advertising, please explain why.

The main hurdle cited by those that would not consider using it was price (22%) followed by lack of interest (17%).



Advertiser: Gemeinde Bad
Füssing - Kur- &
GästeService Bad Füssing
Agency: Wilde & Partner
Communications GmbH
Broadcaster/Channel: RTL

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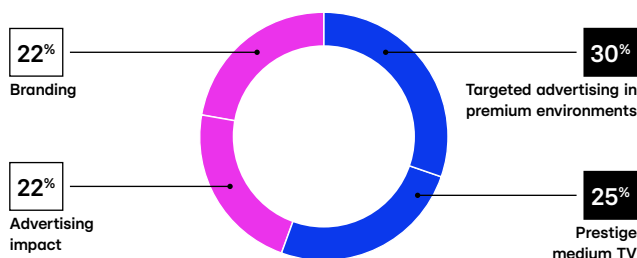
Of the respondents who had used Addressable TV, a large proportion (73%) said their experience with it had been positive. When they were asked what Addressable TV advertising can do that other forms of advertising for SMEs cannot, advantages cited included targeted advertising in premium environments, a prestige medium, advertising impact, and branding opportunities. What is evident from this research is that there is significant untapped potential for Addressable TV advertising in the SME market as well as potential to build on these positive experiences, but a variety of misconceptions and barriers first need to be overcome. ✕

RTL AdAlliance research

No. of respondents: 64

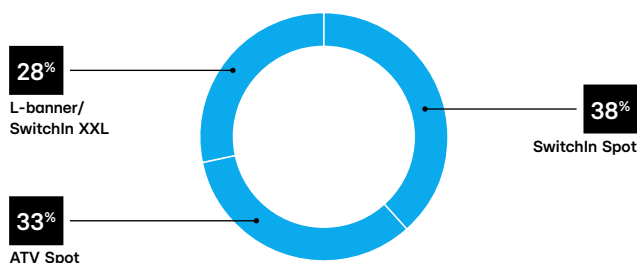
What can Addressable TV do that other forms of advertising for SMEs cannot?

Of those that do run Addressable TV campaigns, 30% do so as they see it as offering targeted advertising in premium environments. Other advantages cited include that it is a prestige medium and has a high impact.



What advertising formats do you usually run on?

SMEs running Addressable TV advertising campaigns are using a variety of video and display ad formats.



Please describe your company's experiences with using Addressable TV as an advertising channel.

A large majority (73%) report that their experience with Addressable TV has been positive.

73% report positive experiences

Addressable TV advertising: a solution for SMEs

RTL AdAlliance's research highlighted not only the misconceptions that surround Addressable TV advertising – and TV advertising in general – among SMEs but also what SMEs' priorities are when choosing their advertising platforms. To explore how Addressable TV advertising could help SMEs reach their target customers in an increasingly fragmented landscape, this section addresses those misconceptions and highlights how the benefits of Addressable TV fulfil those key priorities.

Addressing the misconceptions

■ Too expensive

Addressable TV advertising brings a new level of affordability to TV advertising when compared with traditional TV advertising – it is possible to advertise on Addressable TV with just a few thousand euros. Minimum booking volumes are low, the simple design means pre-existing marketing collateral can be repurposed, and there is less wastage as ads are only delivered to the relevant audience.

■ No interest, not needed

73% of Europeans own a smart TV,⁴¹ and as the digitalisation of TV continues, Addressable TV advertising offers a unique opportunity to reach specific target customers through a trusted, premium medium many watch every day. Attention-grabbing L-banner/SwitchIn XXL Addressable TV display ads are a strong addition to any SME's media strategy, particularly those looking to attract customers in their local neighbourhood.

■ No industry target group

There is a common misconception that no one watches linear TV any more and everyone is streaming content. However, research shows that 68.9% of Europeans watch linear TV every day,⁴² and the average viewing time in Europe for linear TV is more than three hours per day.⁴³ So whatever the target group SMEs are looking for, linear TV is where they have the best chances to find them.

■ Does not fit the company

Addressable TV advertising's targeting capabilities and cost efficiencies broaden the relevance of TV advertising to companies that may have previously assumed it was not for them – such as small local businesses or those offering a niche product/service – making it a fit for any company.

■ Too specific/unspecific target group

The data-driven processes behind Addressable TV advertising mean ads can be targeted as narrowly or as broadly as required – for example, with geo-targeting, ads can be delivered to just a few postal codes or individualised ads can be delivered to thousands of postal codes.

■ Too complex

Addressable TV advertising utilises similar targeting and automation technologies to the advertising offerings from the US platforms (for example, GAFA), and its simple L-banner/SwitchIn XXL display ad format for SMEs is easy to create and customise. The suite of tools and solutions offered by RTL AdAlliance, in partnership with tech provider smartclip, are designed to eliminate any complexity, allowing resellers to run automated, streamlined campaigns for all types of SMEs.

Outlining the benefits

The four main reasons SMEs cite for choosing advertising platforms are that they offer **easy access**, allow them to reach their **target audience**, are **cost-effective**, and offer **simple ad creation**. By taking a closer look at the benefits of Addressable TV advertising for SMEs, this section highlights how it delivers on those key priorities.

SME benefit 1

Access to a high-performing, simple-to-create ad type proven to meet SME needs

Through RTL AdAlliance, SMEs have easy access to the high-performing L-banner/SwitchIn XXL ad type, one of the most popular and established forms of Addressable TV advertising. The L-banner, which was introduced by smartclip in 2014 as the first Addressable TV ad format in Europe,⁴⁴ is a display ad that is inserted directly into the live linear broadcast stream, not in the regular ad break. It appears when the channel is changed and surrounds the live content in an L shape. The advertising material covers 40% of the screen, providing high visibility.

The L-banner/SwitchIn XXL's familiar, versatile display format and straightforward material requirements ensure simple ad creation, and the ads can be static or animated. Minimal design expertise is required to create the ads, and existing marketing materials can be repurposed to reduce expense and ensure consistent, impactful multi-platform campaigns. To enhance this simplicity, RTL AdAlliance's SME Business division offers the ability to create ads using the Ad-Studio (see next section) – which is integrated into the Self-Booking Tool – so resellers are able to design individualised ads as part of the booking process. →

Benefits of the L-banner/SwitchIn XXL ad type for SMEs

- Exclusive placement within the content stream
- High visibility covering 40% of the screen
- Minimal resources needed thanks to simple ad creation
- Versatile design and functionalities

SME benefit 2

Talk directly to target customers

By maximising the wide variety of data now available, Addressable TV allows advertisers to narrowcast their advertising efforts and deliver dynamic, highly granular targeted advertising on a 'one-to-one' basis. This makes TV advertising cost-effective and accessible to even the most niche brands, who are able to focus their ad spend on their target audience and connect with them through customised ads, without wasting ad spend on a more mass-market delivery and hoping their desired audience might see it.

Targeting can be optimised based on numerous variables made possible by the TV delivery, the digital delivery, and the Addressable TV delivery (see graphic). Addressable TV adds value with a wealth of new targeting opportunities – from storytelling options to localised geographical targeting. An example of the highly granular nature of Addressable TV targeting is the ability to deliver ads depending on the weather – if it is sunny, ads for ice cream or sunglasses are automatically prioritised; if it is raining, ads for umbrellas or waterproofs take priority. Targeting is also very flexible – the variables can be adjusted if requirements change during a campaign, new variables can be set for new campaigns, or different variables can be set for different campaigns. Regularly monitoring and updating the targeting variables will ensure ads are always reaching the right households.

Particularly relevant to SMEs is the geographical targeting capabilities of Addressable TV. Although many SMEs offer products or services nationwide via e-commerce or digital platforms, a common characteristic of SMEs is that they often operate within a limited geographical area – for example, hairdressers, restaurants, tradespeople, educational establishments, real estate agents, or local retailers. For these businesses, placing TV ads with national reach is inappropriate, and the ads will also be irrelevant for the majority of viewers. The opportunity to narrow down the audience just to their area enhances SMEs local reach, allowing them to talk to their neighbours even though the programming appearing alongside their ad has a wider geographical reach. Such focused geographical targeting gives SMEs a unique opportunity to build familiarity with the viewers in their community, with the visibility offered by TV ads strengthening their position as the 'local hero' for the products/services they supply. This is particularly relevant when SMEs are operating in areas where there is high competition from similar businesses – for example, a bakery in a busy urban area will be competing for custom with multiple other bakeries in the same area, so an engaging locally targeted TV ad will help them stand out.

Addressable TV variables

-  Geographical
-  Weather
-  Dynamic real-time data
-  Storytelling
-  OTS (frequency) increase
-  Net reach increase

TV targeting variables



Sociodemographic



Interests



Vertical/
contextual



TV panel based

Digital perspective



Cross device



Profile-based



TV behavioural including sponsoring



Segmentation



SME benefit 3

Advertiser: Möbel-Bohn GmbH
Agency: Schlitzer, Koch & Partner Werbeagentur GmbH
Broadcaster/Channel: RTL

Low minimum booking volumes and simple booking processes eliminate barriers to TV advertising

Reducing minimum booking volumes and simplifying booking processes is an essential element of ensuring TV advertising is accessible and scalable for SME clients. Historically, TV advertising was very labour intensive and minimum booking volumes were high – starting at five- to six-digit figures (in euros) – much higher than the average annual ticket sizes of most SMEs. However, with Addressable TV – and the various SME-specific tools and solutions available via RTL AdAlliance's SME Business division and its tech partners at smartclip – it is possible to simplify booking processes and achieve significantly lower minimum booking volumes. The automated technology-driven and data-driven processes of Addressable TV eliminate much of the manual work previously involved in creating TV campaigns. For example, RTL AdAlliance's Self-Booking Tool (see next section) allows for lower SME-appropriate booking volumes and resellers can book campaigns quickly and efficiently. And Addressable TV's simple ad types, dynamic creative, and granular targeting further maximise efficiency. All these attributes make Addressable TV highly cost-effective, even when booking fewer impressions, eliminating many of the barriers SMEs previously faced and ensuring a highly scalable business opportunity for resellers.

Businesses can book the volume of impressions that suits their specific budget, and ads still appear within the same premium TV environment inhabited by bigger brands with bigger budgets.

SME benefit 4

Highly scalable, dynamic creative offered to franchises and retailers with multiple outlets

Addressable TV advertising's L-banner/SwitchIn XXL display ad is highly scalable for SME campaigns covering multiple outlets. Previously, if a business wanted to deliver targeted TV ads to different postal codes – for example, with localised information on outlets or offers – each individual creative would have to be manually produced. Now, with the Multi-Location and PoS-Marketing solution (see next section), resellers can easily scale and handle campaigns for multiple locations, automatically delivering dynamic, individualised creative to hundreds or thousands of postal codes quickly and efficiently. This saves time, effort, and money for SMEs and resellers, making targeted TV advertising more accessible. →



SME benefit 5

High-quality, low-complexity, brand-safe alternative to the advertising offerings of the US platforms

Addressable TV advertising brings similar targeting and automation technologies offered by the GAFA platforms, which most resellers (and many SMEs) are already familiar with, to the prestige environment of TV. RTL AdAlliance's SME Business division, in collaboration with tech provider smartclip, offers innovative tools and solutions (see next section) that eliminate any complexity and ensure resellers can easily create and manage automated, streamlined, scalable Addressable TV campaigns for all types of SMEs. In the near future, API automation will allow resellers to integrate Addressable TV into their own marketing cockpits or dashboards, enabling them to run Addressable TV campaigns on a familiar platform and directly alongside wider multi-media operations.

TV ad placement is very exclusive, bringing prestige to the brand, and the L-banner/SwitchIn XXL ad format is proven to have high impact within the editorial context of TV. TV is a trusted medium,⁴⁵ and ads only appear alongside premium broadcaster content, reducing brand safety concerns that could be associated with, for example, ads appearing alongside user-generated content. Addressable TV ads are also only delivered to households that have actively consented to receiving them, removing any concerns about data safety.

SME benefit 6

Transparent reporting and measurement

The digitalisation of the entire TV environment brings a whole new level of transparency to TV advertising, allowing access to a wealth of data about TV campaign delivery that was not previously available. With Addressable TV, advertisers can now access as much reporting and measurement data about their TV campaigns as they are used to accessing for campaigns in other online environments. When running Addressable TV campaigns via RTL AdAlliance's SME Business division, clients are sent bespoke reports that give a full breakdown of campaign delivery. This allows them to see exactly what date and time their ads were served, what channel they were shown on, what programme they were shown within, the number of impressions, and the number of unique users the campaign reached. The SME Business division, in partnership with tech provider smartclip, has also developed an internal tool – the Screenshot Builder (see next section) – that allows it to provide screenshots of the ads within the programmes they were displayed in, so clients can see how their ads looked within the TV environment.

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SME benefit 7

Delivers a personalised experience and increases impact and recall

Addressable TV advertising uses data and technology to deliver exactly what today's consumers are looking for – a personalised experience. Research commissioned by RTL AdAlliance, smartclip, and Ad Alliance Netherlands for the New Life of the Living Room report shows that 37% of Europeans are interested in receiving targeted ads that are more suited to their interests, and this percentage rises to 47% among those aged 18-34 years.⁴⁶

The strong performance of Addressable TV ads is also highlighted in a study commissioned by Campaign and Finecast,⁴⁷ which saw scientists from University College London undertaking experiments involving MRI brain scanning and behavioural testing. The results showed that Addressable TV ads produce greater brain activation in the significant areas related to attention, emotion, reward, and memory, meaning ads have more impact on viewers and are more memorable than traditional TV advertising. An accompanying online experiment also showed that Addressable TV ads were recalled better, with a 10% increase in accuracy and a faster response time than non-addressable ads.

SME benefit 8

Reach customers at scale and build awareness on multiple platforms

Addressable TV enables SMEs to reach their target audience at scale across a diverse variety of TV platforms and channels using automated processes. With 68.9% of Europeans watching linear TV every day,⁴⁸ Addressable TV offers huge reach directly into almost every living room in Europe, unlike other ad formats such as DOOH (digital out-of-home) formats, which mainly appear in metropolitan areas or bigger cities only. For example, RTL AdAlliance's SME Business division currently has 15 channels within its portfolio in Germany alone and is working with RTL AdAlliance partners to extend its offering across Europe as a whole.⁴⁹ Addressable TV advertising also offers SMEs the easily accessible L-banner/SwitchIn XXL display ad format which can be created using similar materials to those used on other mediums. This means Addressable TV can be incorporated into a wider marketing mix to deliver a seamless customer experience and enhance brand awareness. For example, the same imagery used in a digital placement, a print ad, a mailed catalogue, or a billboard can also be used on an Addressable TV L-banner/SwitchIn XXL display ad, increasing the exposure to the brand or message across multiple mediums. ✕

Tools and solutions for resellers

Addressable TV advertising was first brought to Germany by smartclip, the media sales division of which is now part of RTL AdAlliance.⁵⁰

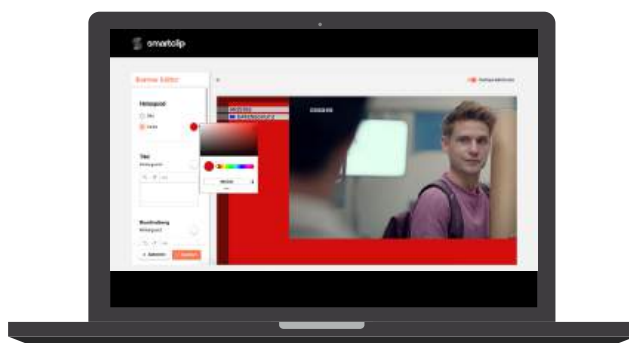
Today, RTL AdAlliance – part of RTL, the leading brand for entertainment in Europe – offers one of the most extensive Addressable TV portfolios in Europe. And through its dedicated SME Business division, it offers a range of exclusive tools and solutions, delivered in collaboration with tech provider smartclip, that have been specifically designed to help resellers run tailored, cost-efficient campaigns for SMEs.

As outlined in this report, Addressable TV advertising offers huge potential for SMEs to reach their target customers, and therefore, it also offers huge potential to resellers working with SMEs. The mission of RTL AdAlliance's SME Business division is to provide resellers with the tools they need to successfully harness this new business opportunity. Its tools and solutions are only available to resellers – not directly to advertisers – so partners have the security of knowing RTL AdAlliance's SME Business division is not talking directly to SME customers.

When resellers work with the SME Business division, they have access to a brand-safe publisher as well as extensive market and client know-how, alongside easily explainable tools and solutions (as outlined here) that offer maximum standardisation, complexity reduction, high scalability, and best-in-class training. ✕

Create

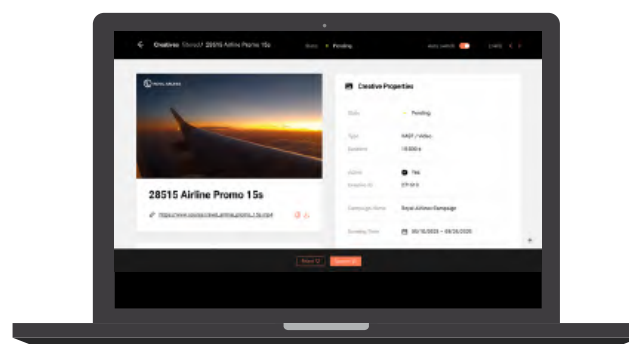
Ad-Studio (included in Self-Booking Tool)



The Ad-Studio – part of the Self-Booking Tool described on the next page – allows resellers to create individualised ads themselves quickly and easily. Images can be uploaded, background colours can be chosen, and font sizes/colours can be selected. The tool shows the overlays, so users know the safe areas to input information, and it also shows the file size and allowed formats. Once finalised, the ad creative can be pushed automatically into the Creative Approval Tool (see below), so broadcasters/publishers can check it meets their quality requirements.

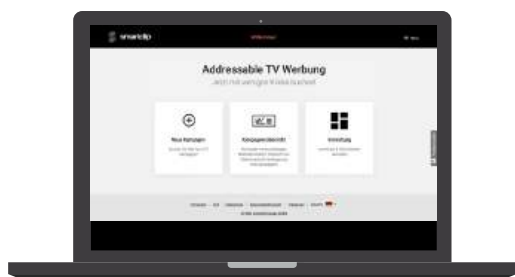
Approve

Creative Approval Tool



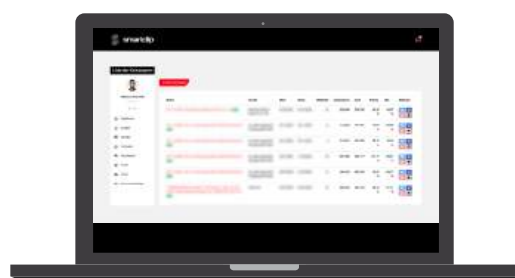
Managed by the supply side, the Creative Approval Tool simplifies and expedites the quality control process for broadcasters and publishers in terms of checking that each creative meets their platform's quality requirements. It can be used for direct communication about creatives between broadcasters/publishers and resellers and also offers a range of preview, information, and history functions. With the Creative Approval Tool, creative quality approval is fully integrated into the smartx platform.

Self-Booking Tool



As well as offering IO-based campaign booking, RTL AdAlliance's SME Business division also offers the Self-Booking Tool, which allows resellers to book premium Addressable TV inventory themselves via one centralised platform. Resellers can create Addressable TV ads (via the integral Ad-Studio) and book their own Addressable TV campaigns in just a few clicks, and the tool has been specifically designed to allow for lower SME-appropriate booking volumes. Through the Self-Booking Tool dashboard, resellers can easily access full information on each campaign, such as performance, forecasting, and reporting, as well as administrative functions such as user management. The Self-Booking Tool is ideal for standard campaigns, for example, involving one creative, one time span, and one set of targeting criteria. The Multi-Location and PoS-Marketing solution (see below) is designed for more complex campaigns involving dynamic creatives, multiple postal codes, and different budgets.

Multi-Location and PoS-Marketing solution



The Multi-Location and PoS-Marketing solution is specifically designed for international clients with larger businesses that have local branches in multiple locations (for example, a car manufacturer with multiple dealerships or a retail chain) or with franchise-based businesses. Each of these local branches is an SME working with the license and, therefore, is acting as an SME in a joint campaign. A joint campaign pools resources from local advertising budgets, enabling SMEs to benefit from a national campaign without competing with the parent brand's national advertising budget. The local branch contributes financially, and the parent brand buys impressions centralised in that local area – information for the local branch is then added to the creative delivered in their relevant postcode area. The Multi-Location and PoS-Marketing solution allows resellers to manage highly scalable campaigns that automatically deliver multiple locally adjusted creatives in multiple locations. Meanwhile, minimal effort is required from each local branch – only the standardised creative with a branding area is needed, and smartclip creates multiple local creatives based on the information of each local branch.

Until now, the huge amount of time and effort involved in manually adapting creative, as well as budgets and impression goals, according to each individual location made this type of campaign virtually impossible. By offering fully automatic adjustment of advertising creative at branch and/or offer level (for example, name, address, URL, product data, or promotions) as well as the ability to combine individual budgets and impression goals within one single campaign, the Multi-Location and PoS-Marketing Solution removes the manual work previously involved and allows resellers to harness the granular targeting powers of Addressable TV advertising efficiently and with minimal time and effort.

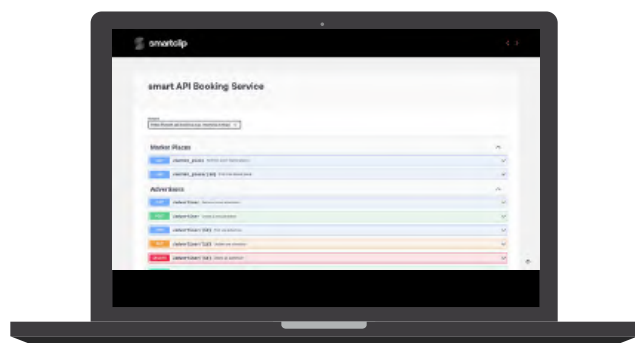
Screenshot Builder



The Screenshot Builder is an important element of the campaign reporting provided by RTL AdAlliance's SME Business division. With the Screenshot Builder, which was developed by tech provider smartclip and is integrated into the smartx platform, the SME Business division can provide screenshots of the ads within the programmes they were displayed in, so clients can see how the ads looked within the TV environment. Just like print clippings meant clients did not have to buy a newspaper or magazine to see their ads running, the Screenshot Builder ensures clients do not have to be watching the TV to see what their ads look like – which is particularly useful when the client's household does not fall into their own business's targeting criteria!

Integrate

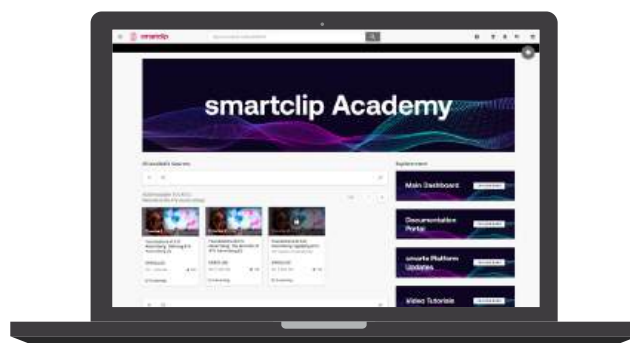
API automation



Resellers will soon be able to utilise standard APIs (Application Programming Interfaces) to integrate RTL AdAlliance's advertising products (such as Addressable TV) into their own marketing cockpits or dashboards. This will allow resellers to easily access, book, and manage Addressable TV campaigns in a fully automated way through their own familiar, centralised platform, alongside other advertising inventory (such as GAFA inventory). The API will allow for fully automated functions such as forecasting, reporting, and campaign setup.

Educate

smartclip Academy



To ensure Addressable TV advertising becomes more accessible in the future, the smartclip Academy is planning to launch a training programme tailored to resellers. This programme will aim to offer resellers comprehensive resources and expertise to train their staff and clients on a wide range of Addressable TV-related topics. More information on this programme will be available soon.

Conclusion

Optimising Addressable TV: recommendations for L-banner/SwitchIn XXL creative and targeting

The RTL AdAlliance SME Business team has already partnered on several thousand SME campaigns and can therefore guide resellers with more detailed information on how to optimise the performance of an Addressable TV campaign.

Creative

The L-banner/SwitchIn XXL ad format – a non-video L-shaped ad that surrounds the live content – is a popular choice for SMEs. Its brevity means that viewers see it as a reminder of the advertised brand – an amplifier that briefly and concisely informs them about new products or promotions. In TV consumption, it stands in the area of tension between activation and relaxation, meaning that it plays into both the 'activation' mindset, as the viewer can be given call-to-action information that clearly explains how to find out further details or how/where to buy the service/product, and the 'relaxation' mindset, as the viewer is relaxing while watching linear TV. If the creative takes this into account, the L-banner/SwitchIn XXL meets with a high level of acceptance and is experienced as added value.

Recommendations for enhancing the performance of L-banner/SwitchIn XXL creative are as follows:

• Create recognition features

Include a photo of the company owner on the left side to build trust and a logo on the bottom right to ensure immediate recognition.

• Image beats word – or less is more

Pictures – such as images of the company owner, the products or the services, and company logos – should play a central role.

• Include information with novelty value

Focus on the latest information such as current promotions, changed opening hours, special discounts, new product launches, or other 'new' news about the company, services, or products.

• Include small animations

Use small animations such as GIFs

Targeting

When it comes to targeting, resellers and advertisers should consider in advance exactly how best to reach the desired target group. Initially, it may seem to make sense to combine various targeting groups in order to achieve the most precise targeting possible, but in practice, this does not always offer the best results. For example, if a sports retailer was looking to reach sports enthusiasts, they may think that combining targeting the 'sports' topic (in terms of channels and interests) with a time targeting of 'primetime' would offer optimum performance. However, this would miss all the viewers tuning in to watch sports at other popular times of the day or week, i.e. on a Saturday afternoon. In this example, targeting the sports topic but running ads throughout the entire day would be more appropriate. This scenario shows how some theoretical targeting combinations may, in reality, make less sense. The RTL AdAlliance SME Business unit can help to advise further on how to maximise the targeting of a L-banner/SwitchIn XXL campaign. ✕



Key takeaways

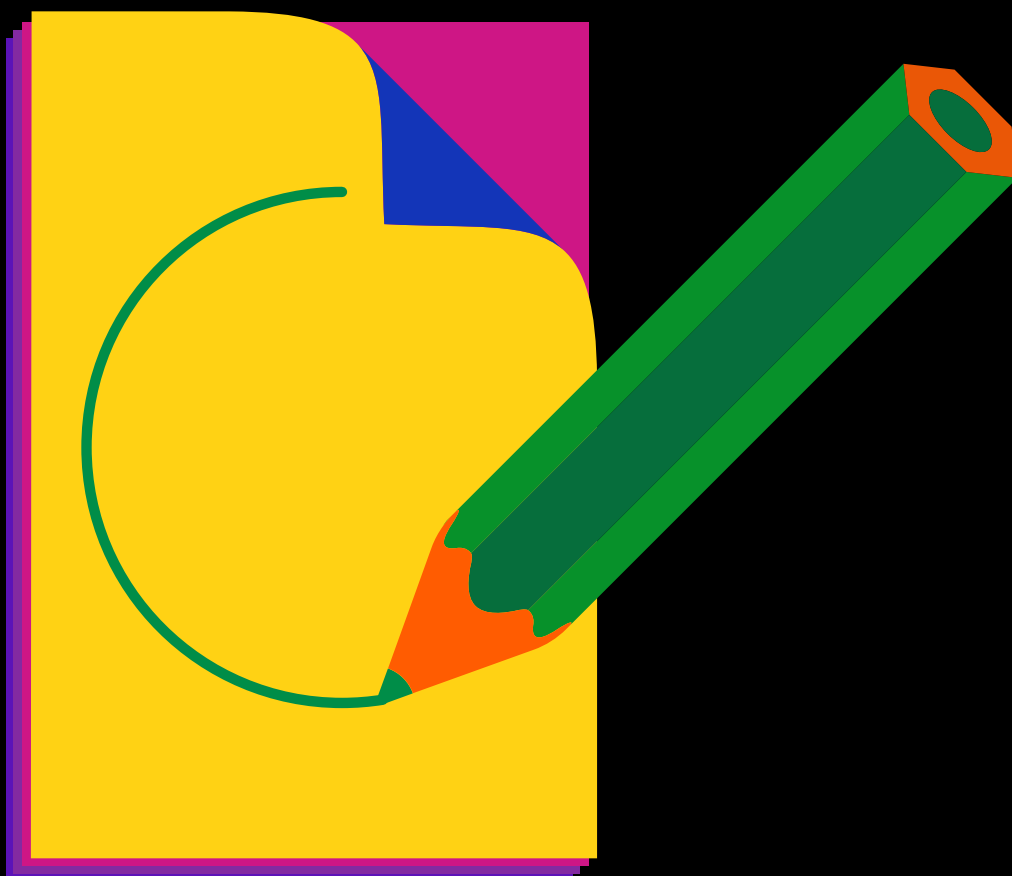
Addressable TV advertising presents a compelling opportunity for SMEs to connect with their target audience in a meaningful and cost-effective manner. Several key takeaways underscore the benefits of this advertising medium for SMEs:

- **Addressable TV enables SMEs to enhance brand awareness among the people that matter most,** fostering familiarity within their local communities and establishing themselves as local heroes for their products and services. The positive experiences reported by 73% of businesses that have used Addressable TV further attest to its effectiveness in offering targeted advertising in premium environments.
- **Addressable TV opens the door for SMEs to enter the prestige world of TV advertising,** which was once reserved for big brands. It offers an exciting alternative to the conventional approaches and relies on data-driven targeting technologies to deliver automated campaigns, bypassing the limitations of 'walled garden' GAFA offerings.

- **The L-banner/SwitchIn XXL display format proves to be an ideal choice for SME campaigns,** requiring minimal resources and offering easy creation and high visibility. This format's proven performance and engagement potential add to its appeal for small businesses. See the previous section for specific recommendations on maximising L-banner/SwitchIn XXL performance.
- Considering that SMEs represent a vast majority of businesses in Europe, **Addressable TV advertising can provide substantial new revenue streams for resellers and broadcasters alike,** further strengthening its significance in the advertising landscape.
- **Addressable TV advertising can be integrated into a multi-channel approach,** complementing other marketing efforts and enhancing overall brand awareness.

Addressable TV advertising presents a golden opportunity for SMEs to harness the power of TV advertising in a targeted, efficient, and impactful manner. By embracing this medium, SMEs can reach the right customers, build stronger connections within their communities, and unlock new growth potential in their business endeavours.

With the right tools and solutions, such as those offered by RTL AdAlliance's SME Business unit in partnership with technology provider smartclip, resellers can deliver successful campaigns and empower small businesses to thrive in the dynamic world of TV advertising. As Addressable TV continues to evolve and gain traction, SMEs stand to gain a competitive edge and level the playing field with larger brands, ushering in a new era of growth and success. ✕



Case studies & interviews

Geographical targeting

Interview with **Marc Eichenhorst**

knorrwerbung



Marc Eichenhorst
Managing Director,
Knorrwerbung GmbH (reseller)

What are the main benefits of Addressable TV for SMEs?

More visibility, exactly where it matters. Ads get full attention after the channel is changed, can be played in precisely definable postal codes, and can be tailor-made specifically to the target group.

What are the common misconceptions SMEs have about Addressable TV advertising?

Mostly that it is too expensive and that it can only be seen on online television.

What are the common challenges SMEs face with regard to Addressable TV, and how can those be addressed?

We believe that SMEs simply need to understand how straightforward Addressable TV can be.

What are the key qualities that maximise the success of Addressable TV ads?

The advertising material used is always central to success. It must create visibility and enhance understanding for the customer, and a clear message is important.

What types of targeting are proving most successful?

Our clients mainly use options to specify the postal codes and the times. For example, if I want to recruit staff, I should advertise when this person is actually at home. ✕

”

The advertising material used is always central to success.

Case Study

Client

KBN Beschichtungstechniken GmbH

Industry

Manufacturing/engineering (coating technologies)

Location

Niederzissen, Germany

Purpose of campaign

Recruitment campaign

Type of ad

L-banner/SwitchIn XXL



Campaign info

KBN, a company providing coating technologies, ran an Addressable TV advertising campaign designed to recruit new staff. The company is located in Niederzissen, directly on the A61 autobahn. Using targeting based on postal codes, the L-banner/SwitchIn XXL ads were delivered to locations reachable within a 20-minute commute of the A61. This geo-targeting was further enhanced in the L-banner creative, in which a graphic of the A61 route was faded in.



Broadcaster/Channel: Sport1

Case studies & interviews

Increase awareness

Interview with **Heiko Zander**

 **Heise** RegioConcept



Heiko Zander
General Sales Manager,
Heise RegioConcept
(online marketing and
advertising agency)

What are the main benefits of Addressable TV for SMEs?

An increase in the level of awareness of the company, increase of trust in the company, and perception as a market leader.

What are the common misconceptions SMEs have about TV advertising?

That TV advertising is not affordable for SMEs, cannot be used locally, and is not adaptable to target groups.

What advice/tips would you give to an SME looking to start Addressable TV advertising?

Carefully define the goal of the campaign, work out the desired target group, and match the design and text of the advertising material to the target group. Ideally, a person representative of the target group should be depicted in the ad. Also keep the regions targeted small and the penetration per household higher, rather than the other way round.

What are the key qualities that maximise the success of Addressable TV ads?

TV viewers are used to high-quality content on TV, so the materials should meet this requirement. Short and memorable messages offer the greatest chance of being firmly anchored in the viewer's mind.

Which industries/companies are currently seeing success?

Car dealerships, real estate agents, retailers, pharmacies. ✕

”

TV viewers are used to high-quality content on TV, so the materials should meet this requirement.

Case Study

Client

Marvin Eichele Roofing

Industry

Roofing

Location

Cuxhaven, Germany

Purpose of campaign

Increase awareness in company's target region

Type of ad

L-banner/SwitchIn XXL



Broadcaster/Channel: RTL

Campaign info

Heise RegioConcept began working with Marvin Eichele Roofing in autumn 2020. The company started up in spring 2020, so the objective was to increase awareness and build trust in the brand. Heise RegioConcept used Addressable TV ads as part of a wider multi-media campaign that also included Google Ads, social media, and YouTube.

Results

The multi-media campaign achieved a high level of awareness for the company in just under three years. So much so that Marvin Eichele said, *"When I visit customers today, they say to me: you're the one from the TV."*

Geo-targeted addressability

Interview with **Volker Mieß**

axel springer—
regionalvermarktung



Volker Mieß
Head of Digital Growth & Sales Strategy,
Axel Springer Deutschland GmbH

What are the main benefits of Addressable TV for SMEs?

Geo-targeted addressability, 100% share of voice, high awareness.

What are the common misconceptions SMEs have about TV advertising?

They don't imagine that it is possible to address target groups in their neighbourhood on linear TV, and they assume higher prices or a bigger spend.

What advice would you give to an SME looking to start Addressable TV advertising?

To start with a small test campaign and to build up a unique audience.

Which industries/companies are currently seeing success?

Travel, infrastructure, energy, retail, finance, entertainment.

What types of targeting are proving successful?

Geo-targeting and themed channels. X

”

SMEs don't imagine that it is possible to address target groups in their neighbourhood on linear TV.

Case Study

Client

Deutsche Post AG - Nuremberg branch

Industry

Logistics

Location

Nuremberg, Germany

Purpose of campaign

Increase brand awareness and recruit new employees in specific areas

Type of ad

L-banner/SwitchIn XXL



Campaign info

To increase brand awareness and recruit new employees in the Nuremberg and Erlangen area, Deutsche Post wanted to try out a new channel and Addressable TV came at just the right time. The wide-screen, attention-grabbing L-banner/SwitchIn XXL format and targeted delivery allowed Deutsche Post to reach potential employees, and the Addressable TV campaign formed part of a cross-channel campaign in the Nuremberg and Erlangen area.



Results

Deutsche Post said: "As supplementary advertising, Addressable TV made sense and we found it very effective. This type of advertising would not have been possible on national stations with a targeted playout and within the normal budget. We used Addressable TV in the media mix so that we could reach as broad a target group as possible. In addition to all the usual media types, this was very useful for us and a perfect addition."

Broadcaster/Channel: RTL

Interactive way of advertising

Interview with **Matthias Reichert**

sport1



Matthias Reichert
CCO and Member of the Management,
Sport1 GmbH (broadcaster)

What are the main benefits of Addressable TV advertising?

We connect the benefits from the TV and the digital world, combining one-to-one communication and a mass audience. The new potential is evident, with possibilities for new products, new clients, and new targeting options. Moreover, Addressable TV guarantees an interactive way of advertising.

How do your viewers respond to Addressable TV ads?

We have observed a high acceptance for creative and relevant ads. Furthermore, our viewers prefer added values, for example, regionally tailored campaigns with direct relation to their consumption.

Do you see Addressable TV as being an important revenue stream for you in the future, and will SMEs play an important role in that?

Addressable TV is an increasing market with more and more relevance for consumers and broadcasters alike. In my point of view, there is a market consolidation looming – just like in growth markets before. This consolidation will strengthen the big players, and I think that SMEs will indeed play a significant role in that.

How do you see Addressable TV evolving in the future?

In the future, TV will be a digital touchpoint with all the advantages of digital processing – such as programmatic advertising, targeting, and a regional approach. ✕



Addressable TV is an increasing market with more and more relevance for consumers and broadcasters alike.

Glossary

Adtech	An abbreviation of advertising technology, adtech refers to the platforms and systems used throughout the digital advertising chain by advertisers, agencies, publishers, and other companies.
Application Programming Interface (API)	An API is a programming method/code or set of defined rules that allow applications and programmes to automatically exchange data and share features.
Linear TV	Linear TV (or just 'TV' before digital technologies arrived) is the name given to the traditional form of television broadcast, where content is delivered via broadcast, cable, or satellite television and viewers watch the content at the time it airs based on a broadcaster-set schedule.
Reseller	Digital SME agencies specialising in SME advertising products such as Google Ads and AddressableTV advertising solutions.
Walled garden	The term walled garden is used to describe any type of closed platform, system, or technology where access to or use of that platform, system, or technology – or the data held within it – is tightly restricted by its owner/operator. In digital advertising, the term is often used when discussing the market's three biggest players: Google, Facebook, and Amazon.

About Norstat

Founded in 1997, we are one of the largest and leading data collectors for market research in Europe.

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In our experience, insight seekers value quality and speed. Automatization of data collection ensures speed and efficiency, while robust quality assurance safeguards that our data is trustworthy.

Thanks to

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About RTL AdAlliance

RTL AdAlliance is the sales house that puts all premium content publishers in Europe for international brands under one roof.

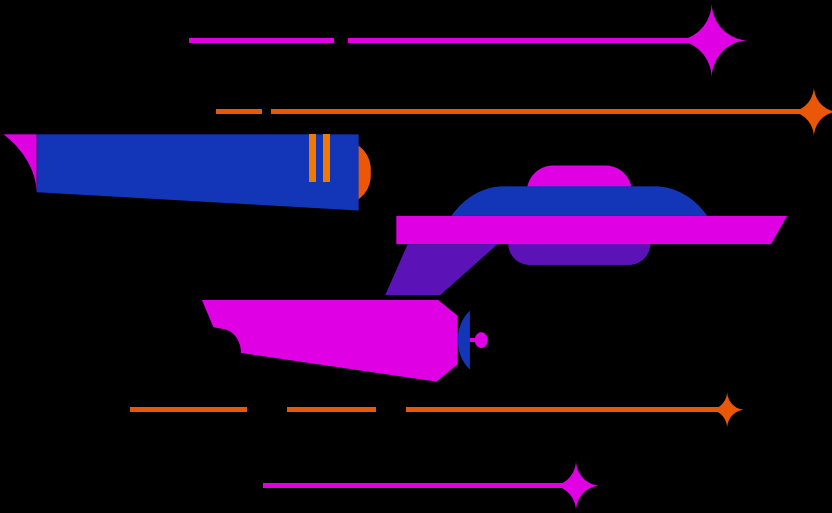
Created from the most successful broadcasting, publishing, and adtech companies in Europe, RTL AdAlliance offers brands access to the audience of 100 TV channels, 900 print publications, and 5,000 premium web properties. RTL AdAlliance offers unrivalled reach in Europe and beyond – totalling over 160 million daily TV viewers and more than 4 billion online ad impressions a month in one streamlined service.

RTL AdAlliance makes a difference through the support of 250 media sales experts all over the world. It provides not only this dedicated support but also access to the latest insights and innovations in the media world. Offering market-leading adtech solutions for buying, selling, and customising ad space, RTL AdAlliance helps brands make the most of each platform at every stage of the customer journey.

RTL AdAlliance gives advertisers simplified access to premium, brand-safe platforms that reach only the most engaged audiences – because people are more receptive to messages when they're enjoying top-quality content. And it empowers publishers to make better use of their premium platforms by providing smarter, simpler monetisation strategies and dedicated media sales expertise. Offering simplicity and value for advertisers and publishers, RTL AdAlliance is Europe's leading total media sales company. ✕

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