



**THE IMPACT OF DIGITAL  
ADVERTISING ON GERMANY'S  
COMPETITIVENESS**

*A study on the role of Digital Advertising in  
Germany*

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# INTRODUCTION

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This report provides insights from new Public First research, conducted in Germany, as well as in 12 other countries in the EU, and the UK.<sup>1</sup> The research explores attitudes towards digital personalised advertising among the businesses and publishers that use them. In this report, we explore the attitudes in Germany, mirroring a wider report that covers attitudes at the EU level published by the Centre for Information Policy Leadership (CIPL).<sup>2</sup> The CIPL report also provides further reflection on the regulatory landscape and policy discussion surrounding personalised digital advertising in the EU.

A key challenge facing policymakers in personalised digital advertising is the lack of insight into business opinion in the area. In the context of the Draghi Report, which highlights the challenges facing smaller companies across the EU, it is important to hear these voices, and to understand the role that digital advertising plays in their business as they establish themselves.

We place these business attitudes central to this research, and specifically the attitudes among smaller businesses. With the support of Google, Public First surveyed 4,287 SMBs across the EU, and 496 in the UK. We also explored attitudes among larger businesses, and publishers, for comparisons at the EU level. This research included a sample of 474 SMBs in Germany, on which many of the findings in this report are based. The research was designed to replicate aspects of similar work conducted in early 2024 with advertisers in the US.

We wanted to understand the experiences of those who use personalised digital advertising; how important these ads are to their business, and the impacts that limiting access to them would have. In order to understand this, we spoke specifically to businesses which make some use of personalised digital advertising, and to those within these businesses who have some oversight on and understanding of their marketing strategy. This gives us a sample with a rich insight in this area, ranging across regions and sectors.

Our research shows the pronounced benefits which having access to personalised digital advertising has for SMBs in Germany. As businesses which often have niche target audiences, and are typically looking to expand rapidly into new markets or audiences, it makes sense that the ability to target these specific audiences is so important to these businesses. Our research shows that these businesses would face challenges without access to these tools, and a majority would regard it as difficult or even impossible to reach the customers they require without them.

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<sup>1</sup> This report was commissioned by **Google**. All information in this report is based on Public First research and analysis. Where information has been obtained through proprietary research and third-party sources, it is clearly referenced in the footnotes. Google has not supplied any additional data to the report and did not inform any of the findings.

<sup>2</sup>[https://www.informationpolicycentre.com/uploads/5/7/1/0/57104281/cipl\\_public\\_first\\_impact\\_of\\_digital\\_ads\\_european\\_competitiveness\\_mar25.pdf](https://www.informationpolicycentre.com/uploads/5/7/1/0/57104281/cipl_public_first_impact_of_digital_ads_european_competitiveness_mar25.pdf)

Our survey also provided the opportunity to understand how this specific audience is making use of the newest technological developments at their disposal, and we explore early attitudes towards AI among this group of small advertisers.

Our research makes it clear that, for these businesses, personalised digital advertising is of **critical importance**.

# KEY TAKEAWAYS

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## Personalised digital advertising supports German competitiveness

- **Competitive Advantage:** Personalised digital advertising levels the playing field in market and customer reach, with 70% of German small and medium-sized enterprises (SMBs) surveyed agreeing that personalised advertising enables them to compete with larger businesses.<sup>3</sup>
- **Revenue Growth:** 85% of German SMBs surveyed report increased overall revenue over the past year directly attributable to using personalised digital advertising.<sup>4</sup>
- **Customer Acquisition:** 49% of German SMBs surveyed claimed that digital adverts have allowed them to find new customers.<sup>5</sup>
- **Serving niche audiences:** 57% of German SMBs surveyed report selling to a very specific group of people or customers.<sup>6</sup>

## Potential Business Impact of Removing Personalised Digital Advertising

- **Difficulty finding customers:** 79% of German SMBs surveyed reported it would be impossible or difficult to find the customers their business needs without personalised advertising.<sup>7</sup>
- **Higher Costs and Lower Revenue:** If personalised digital ads were no longer permitted, 41% of German SMBs surveyed anticipated increased marketing costs and 45% anticipated decreased revenue.<sup>8</sup>
- **Price Increases:** 51% of German SMBs surveyed claim that they would increase the prices of their products/services if they could no longer use personalised ads.<sup>9</sup>
- **Reducing offices:** 28% of German SMBs surveyed selected relocating or reducing the number of offices/facilities as a potential cost-cutting measure if they could no longer use personalised digital ads.<sup>10</sup>

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<sup>3</sup>Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>4</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>5</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>6</sup>Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>7</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>8</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>9</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>10</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

# METHODOLOGY

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Public First conducted an online, anonymous survey of **474** senior decision-makers at German SMBs, and **89** senior decision-makers at large businesses, that use personalised digital ads and are aware of how their business uses ads. Where possible, the questions were focussed explicitly on personalised digital advertising rather than digital advertising in general.

The surveys were conducted online from the **25th October 2024 - 21st November 2024**. The results presented here are unweighted, and reflect the attitudes of the survey respondents.

# RESEARCH FINDINGS

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## Personalised digital advertising supports German competitiveness

A majority of German businesses participating in the study can trace a direct line from their use of personalised digital advertising to their growth and competitiveness in the market. Publishers support unrestricted access to content with digital advertising revenue. Larger organisations across the EU, including Germany, also attribute at least part of their growth to their use of personalised digital advertising.

For SMBs, the ability to deploy personalised digital advertising has a significant impact. 70% of German SMBs surveyed (somewhat or strongly) agreed that personalised ads enable them to compete with larger businesses.<sup>11</sup> 85% of German SMBs surveyed reported growth in their company's overall revenue over the past year and stated that this growth can be directly attributed to using personalised digital ads.<sup>12</sup> For these small businesses, personalised digital advertising is, therefore, a critical part of their business development, helping them to continue competing in the market.

“ Personalised advertising can address exactly the people who are interested in my product - I address a target group directly. If that goes away, potential customers will go away. ”

**PRESIDENT, AUTOMOTIVE**  
500-749 Employees, Germany

For publishers, personalised digital advertising is also an important source of revenue. EU publishers surveyed that use personalised digital advertising generated an average of 34% of their revenue from selling digital ad space.<sup>13</sup>

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<sup>11</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>12</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>13</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

Among EU publishers surveyed, 46% reported that personalised ads help their business by enabling them to earn more revenue, compete with larger publishers (35%),<sup>14</sup> and 33% report being able to hire more people. This has a direct impact on the diversity of content available.

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<sup>14</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

## Digital advertising enables businesses to grow and expand into new markets

A large number of SMBs in Germany are relying on digital advertising to grow their business. 49% of German SMBs surveyed claimed that digital adverts have allowed them to find new customers while 41% say it's helped them generate more revenue.<sup>15</sup> Notably, 23% of German SMBs surveyed reported that digital advertising is the only way to reach customers immediately.<sup>16</sup>

84% of German SMBs surveyed are optimistic about the potential for personalised advertising to improve business growth within their industry.<sup>17</sup>

33% of German SMBs surveyed report that digital advertising helps them market their products or services in new markets or regions.<sup>18</sup>

“ Personalised advertising can be a unique selling point and particularly helps to attract new customers, so a ban would have a negative impact. ”

**C-LEVEL EXECUTIVE, TRANSPORTATION**  
500-749 Employees, Germany

Digital advertising is viewed by German businesses as creating an even playing field, allowing them to compete for customers across the EU Single Market and beyond.

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<sup>15</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>16</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>17</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>18</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

## Personalised digital advertising allows SMBs to reach their highly specific audiences

Personalised digital advertising further enables businesses to directly reach those who are most interested in their products, allowing them to build on their core customer base. For businesses with a difficult-to-find or highly specific customer base, the ability to reach even niche audiences is particularly important and substantially reduces advertising spend. This is most salient for SMBs, and 76% of German SMBs surveyed agree that personalised digital advertisements improve their ability to connect with hard-to-reach audiences.<sup>19</sup>

This is important for SMBs, who often sell to specific audiences. 53% of EU SMBs surveyed report selling to a very specific group of people or customers.<sup>20</sup> We find a similar proportion in Germany specifically, and 57% of German SMBs surveyed report selling to a very specific group of people or customers.<sup>21</sup>

Compared to contextual ads, personalised ads were reported by 50% of German SMBs surveyed to be more effective at reaching their target audience.<sup>22</sup> 36% of German SMBs surveyed find personalised ads to be more effective at improving brand recognition<sup>23</sup>, and 37% find them to be more effective at improving their company's return on ad spend.<sup>24</sup>

“ Then [without personalised advertising] we would no longer be able to reach customers and would therefore make less sales. ”

**C-LEVEL EXECUTIVE, TECHNOLOGY - SOFTWARE**  
500-749 Employees, Germany

<sup>19</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>20</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 4,287 decision-makers at SMBs (fewer than 500 employees) in Germany, France, Italy, Poland, Denmark, Austria, Czechia, Finland, Ireland, Netherlands, Spain, Sweden, and Latvia who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>21</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>22</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>23</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>24</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

# The Impact of Limiting Personalised digital advertising on Competitiveness

Given the complexity of digital and personalised digital advertising, the survey also explored how advertisers and publishers would expect to respond if they were unable to make use of personalised digital advertising.

## Reaching audiences is difficult or impossible

Limitations on the use of personalised digital advertising would make it much more challenging for businesses to reach their customers and for customers to see relevant products. 79% of German SMBs surveyed reported it would be impossible or difficult to find the customers their business needs without personalised advertising.<sup>25</sup> The story was similar in the EU, where 73% of EU SMBs surveyed reported it would be impossible or difficult to find the customers their business needs without personalised advertising.<sup>26</sup>

“ It [limiting personalised advertising] will cause a speed bump in the process of reaching our customers and hence, affect sales. ”

**MANAGER, AUTOMOTIVE**

1,000-4,999 Employees, Germany

## Increased Costs And Decreased Revenue

Limiting the ability to deploy personalised digital advertising raises concerns about losing customers and unnecessary marketing spend. If personalised digital ads were no longer permitted, 41% of German SMBs surveyed anticipated increased marketing costs<sup>27</sup> and 45% anticipated decreased

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<sup>25</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>26</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 4,287 decision-makers at SMBs (fewer than 500 employees) in Germany, France, Italy, Poland, Denmark, Austria, Czechia, Finland, Ireland, Netherlands, Spain, Sweden, and Latvia who use personalized ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>27</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

revenue.<sup>28</sup> Across the EU, 38% of SMBs anticipated increased marketing costs<sup>29</sup> and 46% decreased revenue.<sup>30</sup>

## Wider Market Impact

Participants in the study anticipated other knock-on effects of further limiting personalised digital advertising. 51% of German SMBs surveyed claim that they would increase the prices of their products/services if they could no longer use personalised ads.<sup>31</sup> Additionally, 26% of German SMBs surveyed selected reducing staff<sup>32</sup>, and 28% of German SMBs surveyed selected relocating or reducing the number of offices/facilities as a potential cost-cutting measure if they could no longer use personalised digital ads.<sup>33</sup>

51% of large advertisers in the EU also claimed they would increase prices for their products or services if they could no longer use personalised digital advertisements.<sup>34</sup> 26% in the EU<sup>35</sup> selected staff reductions as one of the ways their businesses would adjust strategies to reduce costs if they could no longer use personalised digital advertising.

Publishers report similar approaches to advertisers. If unable to use personalised digital advertisements, 30% of EU publishers surveyed selected reducing staff,<sup>36</sup> and 32% selected closing locations as potential cost-reduction strategies.<sup>37</sup> Notably, 44% also selected decreasing content production.<sup>38</sup> 56% of EU publishers surveyed would add a paywall or move to a subscription model,<sup>39</sup>

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<sup>28</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>29</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 4,287 decision-makers at SMBs (fewer than 500 employees) in Germany, France, Italy, Poland, Denmark, Austria, Czechia, Finland, Ireland, Netherlands, Spain, Sweden, and Latvia who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>30</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 4,287 decision-makers at SMBs (fewer than 500 employees) in Germany, France, Italy, Poland, Denmark, Austria, Czechia, Finland, Ireland, Netherlands, Spain, Sweden, and Latvia who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>31</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>32</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>33</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>34</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 604 decision-makers at large businesses (500 or more employees) in the European Economic Area who use personalised ads, 25th Oct - 21st Nov 2024

<sup>35</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 604 decision-makers at large businesses (500 or more employees) in the European Economic Area who use personalised ads, 25th Oct - 21st Nov 2024

<sup>36</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>37</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>38</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>39</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

and 74% would increase the number of advertisements on their content if unable to use personalised digital advertisements.<sup>40</sup>

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<sup>40</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

## Digital Advertising Supports Evidence-Based Decisions on Marketing Spend

Beyond the ability to move into new markets, digital advertising gives businesses the ability to accurately measure the performance of their marketing campaigns, providing unique insight into their ad spend. Advertisers can understand the impact of their marketing spend, which is of particular importance when the budget may be tight. When comparing the return on investment (ROI) of digital advertising to traditional media, 66% of German SMBs surveyed said it was better for digital ads than print advertising<sup>41</sup> and 58% said it was better for digital ads than linear TV advertising.<sup>42</sup>

46% of German SMBs surveyed stated that determining the best audience for their advertisements is a way digital ad measurement tools help them make the most of their advertising budget.<sup>43</sup> Furthermore, 34% of German SMBs surveyed reported that ad measurement tools improve their overall advertising return on investment.<sup>44</sup> This provides especially smaller businesses with the ability to maximise the efficiency of their advertising budget and focus their marketing attention on the customers most likely to engage. 48% of German SMBs surveyed reported that ad measurement tools allow them to learn more about their audience and customers.<sup>45</sup>

“ *The return of capital would slow down if we were not able to quickly and directly address our target group and thereby address it.* ”

**FOUNDER, B2B SERVICES**

1,000-4,999 Employees, Germany

<sup>41</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>42</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>43</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>44</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>45</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

## Looking Ahead: Emerging technologies in Support of Digital Advertising

The study also looked at the role businesses in Germany see for new technologies, in particular AI, in the context of digital advertising. Business adoption of AI is in early stages, both in marketing workflows and generally. Businesses in Germany are early in their adoption of AI tools, and in the next few years, they could see unprecedented levels of change in the ways businesses leverage AI technology. This will also impact personalised digital advertising.

### Businesses are positive about the impact AI will have.

31% of German SMBs surveyed believe AI will save them money on creative development,<sup>46</sup> and 31% of German SMBs surveyed anticipate AI will optimise audience targeting.<sup>47</sup> Both are significant factors for organisations with limited marketing budgets. Furthermore, 27% of German SMBs surveyed anticipate AI will improve marketing team efficiency.<sup>48</sup>

“ AI-supported tools can not only monitor the performance of advertisements, but also automatically generate and optimize content. ”

**C-LEVEL EXECUTIVE, INFORMATION SYSTEMS**  
750-999 Employees, Germany

“ Using AI, advertisers can fine-tune their audiences based on demographics and previous interactions. This ensures that the ads reach the right people at the right time. ”

**C-LEVEL EXECUTIVE, EDUCATION**  
100-249 Employees, Germany

Publishers are also positive about the impact of AI. 82% of EU publishers surveyed anticipate that AI-supported personalised digital advertising will have a positive influence on their company's competitiveness within the next five

<sup>46</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>47</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

<sup>48</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 474 decision-makers at SMBs (fewer than 500 employees) in Germany who use personalised ads and have awareness of how their business uses ads, 25th Oct - 21st Nov 2024

years.<sup>49</sup> 57% surveyed said AI empowers them to produce higher quality content,<sup>50</sup> and 50% that it empowers them to produce content more efficiently.<sup>51</sup> Looking ahead, over the next five years, 83% of EU publishers surveyed believe that advancements in AI will positively influence the overall user experience associated with personalised digital advertisements.<sup>52</sup>

“ Artificial intelligence makes day-to-day work in our company easier. Our work processes can also be carried out and completed much faster in all areas. ”

**DIRECTOR/SUPERVISOR, HOME SERVICES & CONSTRUCTION**

100-249 Employees, Germany

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<sup>49</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>50</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>51</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

<sup>52</sup> Google/Public First, "Digital Ads in the EU and the UK", EEA & UK, 2024, n = 481 decision-makers at publishers in the European Economic Area involved in programmatic advertising who use and monetise personalised ads, 25th Oct - 21st Nov 2024

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