

13 June 2018

Welcome to the webinar, we
begin shortly

iab•europe

Attitudes to Digital Video Advertising





**MODERATOR &
PRESENTER**



Ben Geach

*Director, Global Product
Strategy
Oracle Data Cloud*

TODAY'S PANELISTS



Caroline Hugonenc

*VP Research
Teads*



Paul Astbury

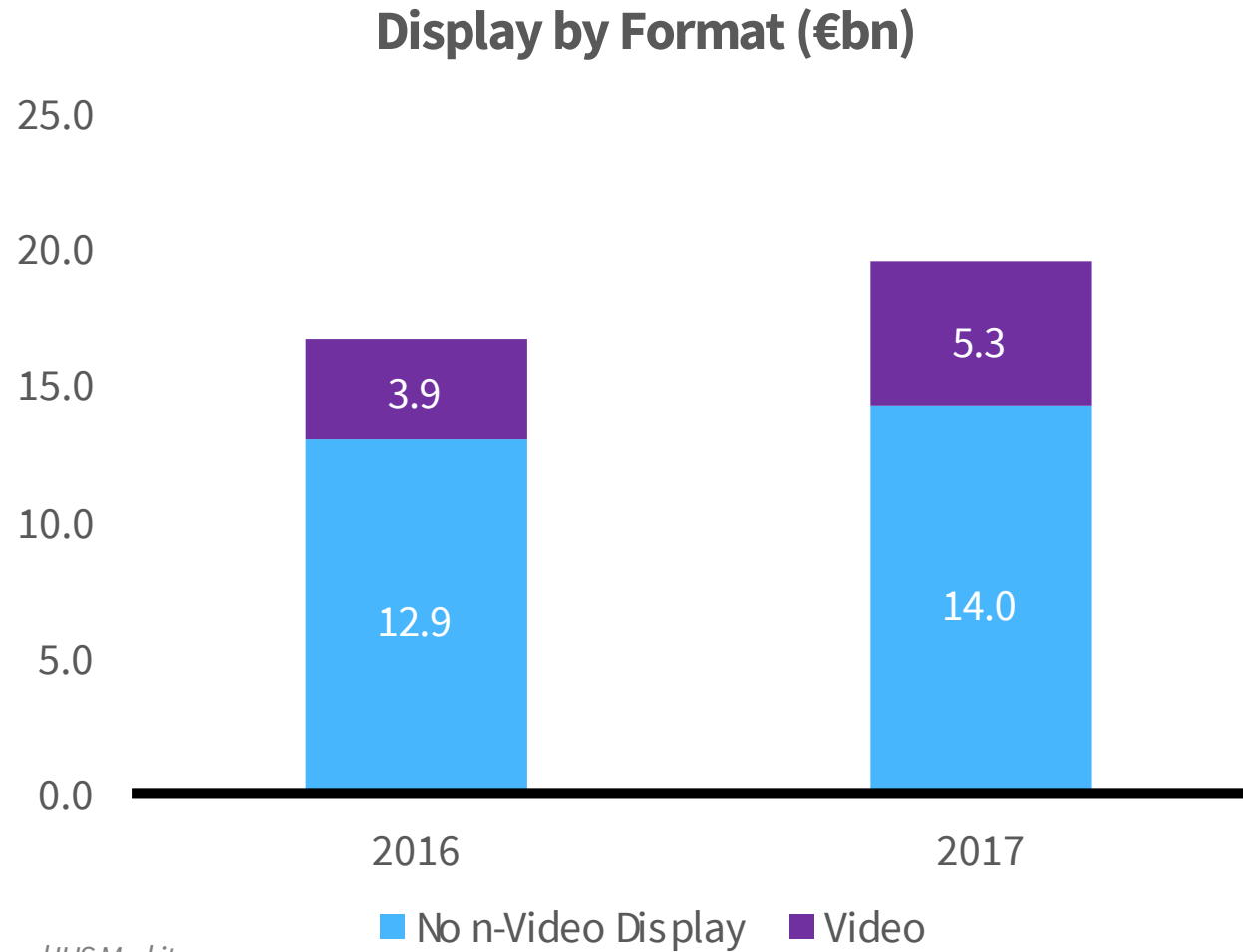
*Business Development
Director Verification, EMEA
Integral Ad Science*



Melissa Roberts

*Head of Video Market
Development EMEA
AppNexus*

Video advertising now accounts for 27% of display

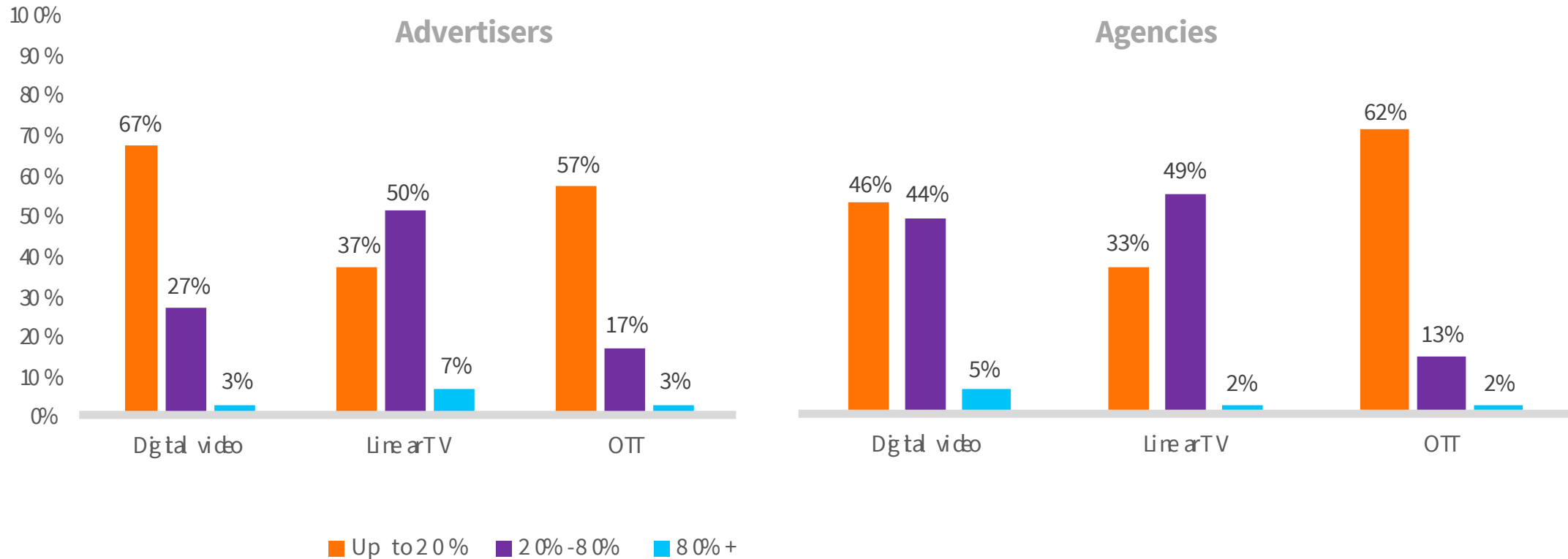


Source: AdEx Benchmark 2017 – IAB Europe and IHS Markit



Digital video advertising is mainstream

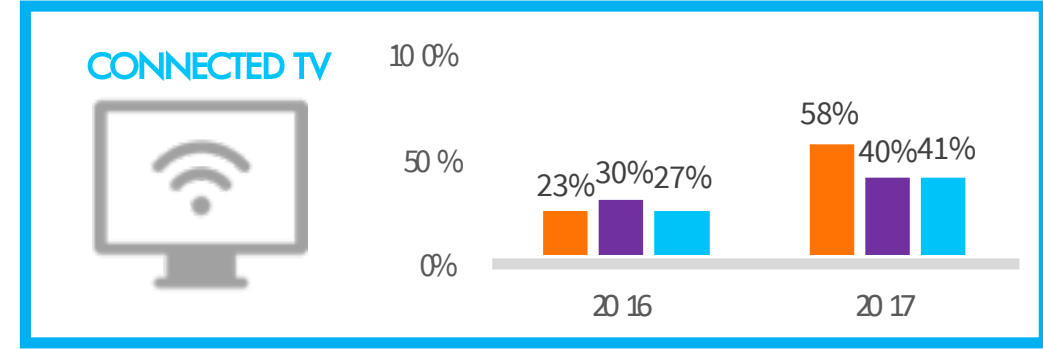
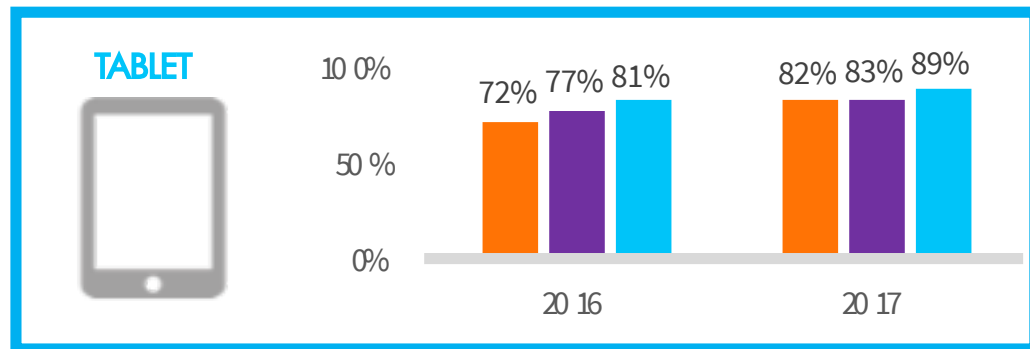
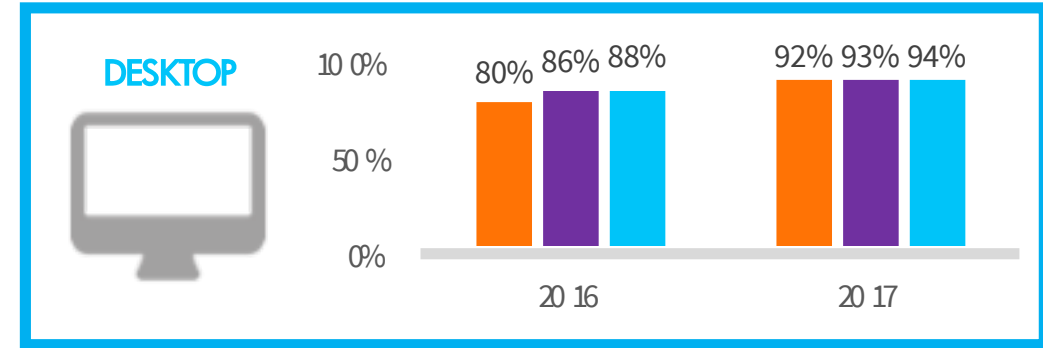
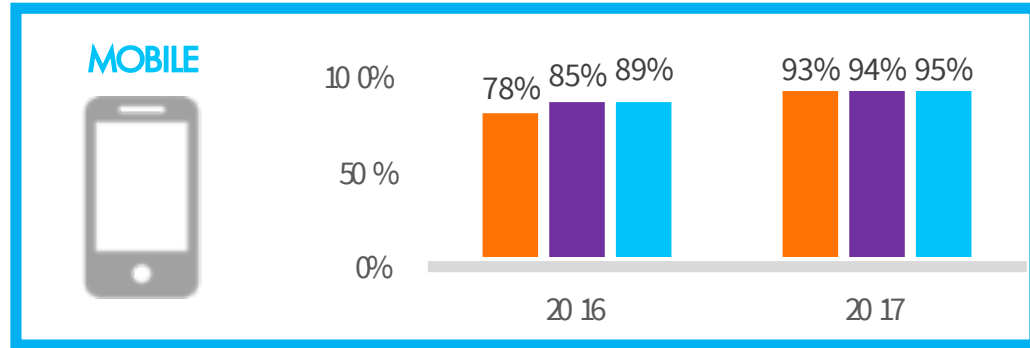
Percentage of advertisers and agencies investing in digital video, linear TV and OTT



Source: IAB Europe Attitudes to Digital Video Advertising Report, March 2018



Mobile has overtaken desktop as the key device for digital video advertising investment



Advertiser Agency Publisher

Source: IAB Europe Attitudes to Digital Video Advertising Report, March 2018



Digital video advertising inventory supply still being established



Source: IAB Europe Attitudes to Digital Video Advertising Report, March 2018



In-stream continues to drive digital video advertising investment

	Advertisers		Agencies		Publishers	
	2016	2017	2016	2017	2016	2017
In-stream (e.g. pre-roll)	81%	88%	86%	91%	80%	85%
In-banner	63%	76%	74%	82%	53%	65%
Out-stream	64%	62%	77%	80%	69%	72%

Source: IAB Europe Attitudes to Digital Video Advertising Report, March 2018



The importance of cross-screen planning

our goals. Having said that, we are exploring options for loans to things.

STRATEGY
we will be successful)

st advantage is the whole stock industry is completely amateur. ry is massively undervalued. What we are doing upstairs with our somehow already the world's best.

I st photographers work alone or in small teams. They are all Nobody has ever really managed to scale. Sev- nselves to produce more of the same look. We come young talented kid comes along who r very talented creatives can develop their ome young talented kid comes along who r I'll open her images and add cherry to it. An amazing photographer takes a photo in N end of the day, zero amazing retouchers have and our best graphic designers have already ad We keep hiring the most talented young re in Thailand and soor brilliant artis

our **CUSTOMERS**, and the **WORLD**.

CUSTOMERS: Connect with our customers and provide them with the best design resources and images. Ultimately we will be successful because we have the best quality work.

WORLD: I first got into photography through travel. I witnessed a very different side to the world to what I saw growing up in Redmarley, Gloucestershire. Although we are in the micro stock category we aim to produce better than the images in the macro stock category. We are in a position to invest more in shoots than almost all of our competitors. The world is but I believe we are in a position now to help significantly to lot of people. At least 50% of all revenue received by Com- children. Over the course of the business we have STRATEGIC reasons we s is the whole stock industry is com- ively undervalued. What we are somehow already the world's

all stock photographers work a with each other. Nobo- ple have cloned

Then there is collaboration. We can hire creatives for specific projects. Hire a famous photographer for a shoot. Contract a font foundry to create a set of fonts for us. For about 3 years now I have been obsessing about starting our own stock agency. The big stumbling block has always been the complexity and capital required to start a site with other contributors. About a year and a half I realized we didn't need to if we could keep focusing on continue to develop our team and systems we could pro- 100% content. Adapting the same strategy of Company model there are potential millions traditional cu- y billions of new customers o the

Although we are in the category we aim to produce b- nan the images in the category. We are in a posi- invest more in shoots f- of our competitors.

team and systems s- ame strat- ally mill-

Virtually, all stock photographers work alone or in small teams. They are all competing with each other. Nobody has ever really managed to scale. Several people have cloned themselves to produce more of the same look. We are creating a system where very talented creatives can develop their own style and share everything. Some young talented kid comes along who can take better images than me. I'll open her images and add cherry to it to regain the number one spot. An amazing photographer takes a photo in New York and uploads it. By the end of the day, zero amazing retouchers have all edited in their own style and our best graphic designers have already added their own touch to it. We keep hiring the most talented young people. I might not be the best young creatives from around the world. We don't need to hire brilliant artists straight out of university. We can undercut other agencies on price by hiring their own people. We are able to do this if we weren't here in the market. I have been obsessing about starting our own stock agency. The big stumbling block has always been the complexity and capital required to start a site with other contributors. About a year and a half I realized we didn't need to if we could keep focusing on developing our team and systems we could produce 100% content. Adapting the same strategy of Company model there are potential millions of new customers out there.

Imagine a revenue of hundred million with 50 million reinvested in photo shoots.

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0 1/16 2/16 3/16 4/16 5/16 6/16 7/16

83% of agencies and 66% of advertisers state that their digital video advertising campaigns are planned in conjunction with TV advertising

Source: IAB Europe Attitudes to Digital Video Advertising Report, March 2018



Investment in digital video advertising set to increase





Panel discussion

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