

Programmatic ad spend in Europe 2018

September 2019

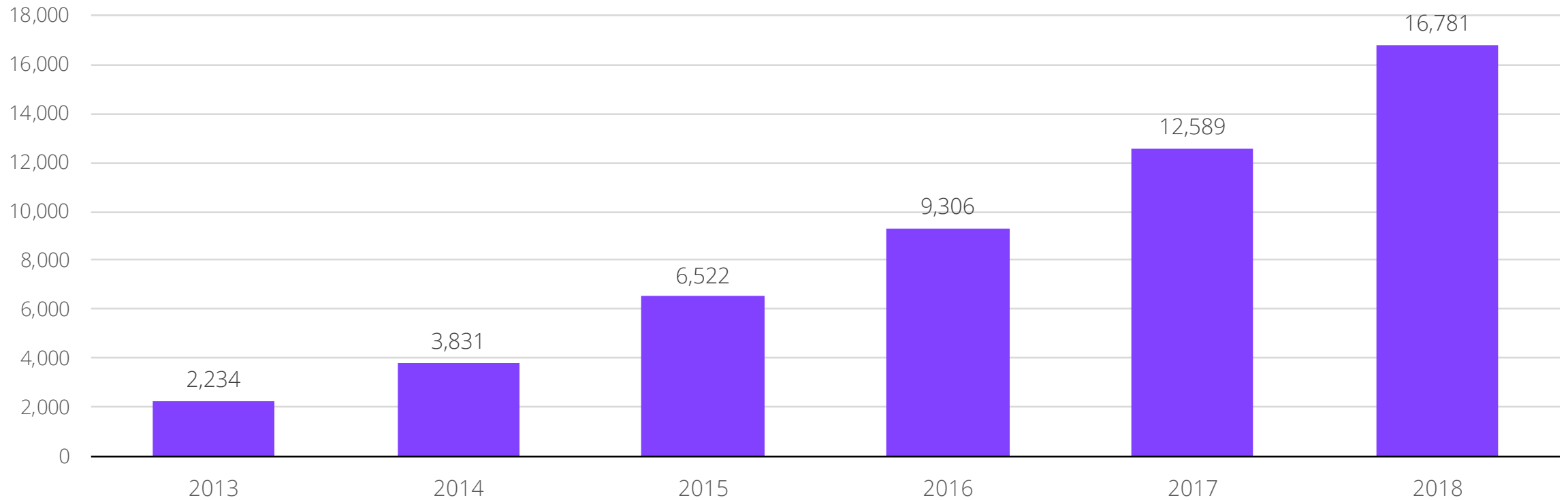


WHAT IS PROGRAMMATIC: DIFFERENT SCHOOLS OF THOUGHT DEPENDING ON COUNTRY & COMPANY

- Automated process of buying and selling advertising inventory through software, data, and algorithms. Programmatic can refer to the automation of workflows associated with buying and selling, as well as the transactions themselves. Transactions are either based on fixed prices, or on auction-based models.
- Ad Spend transacted via the Open RTB protocol.

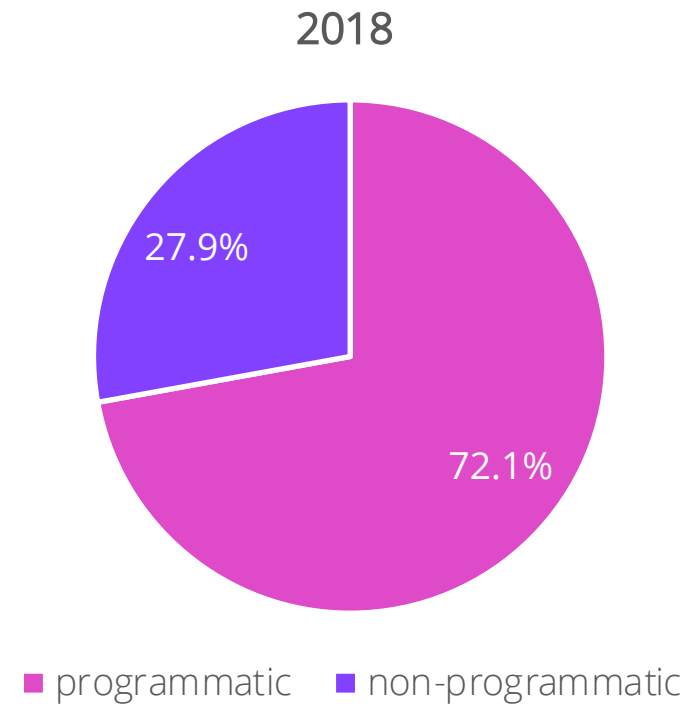
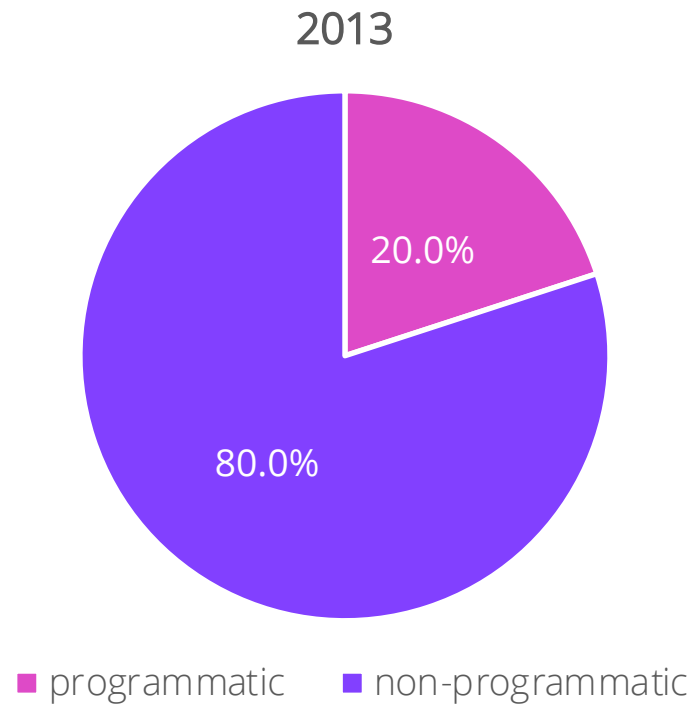
PROGRAMMATIC IN EUROPE IS A €16.8BN MARKET

Total programmatic (incl. social)



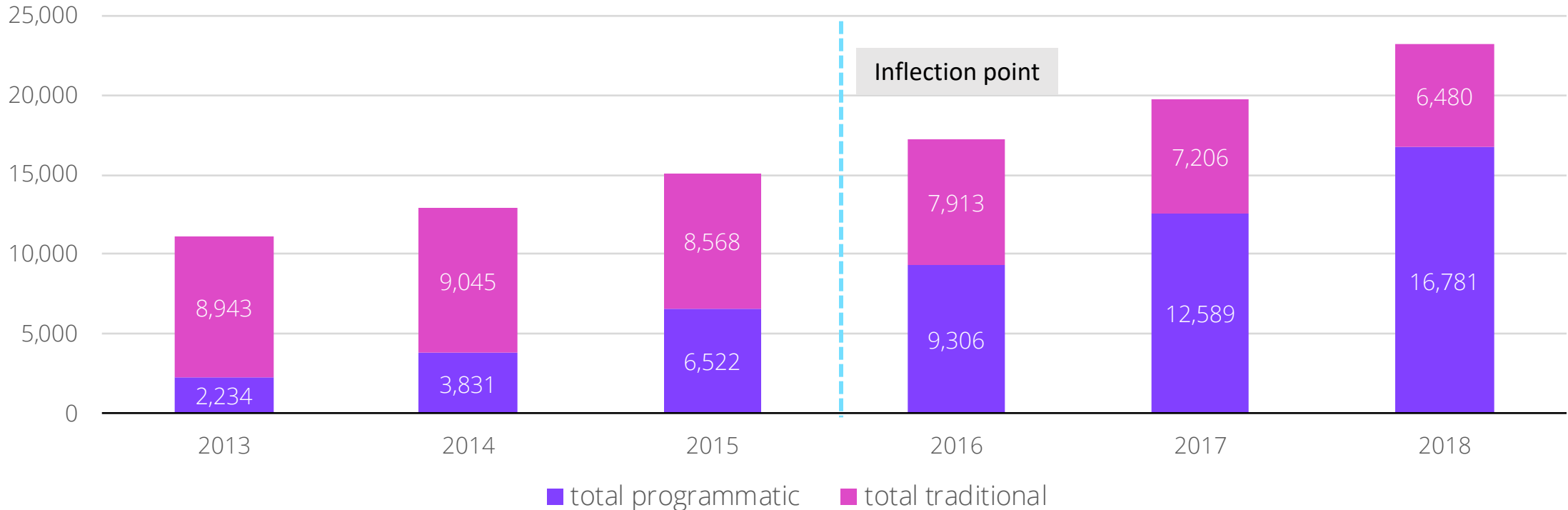
PROGRAMMATIC IS THE NEW 'DIGITAL' - AN UNNECESSARY PREFIX

Share of Digital Ad Spend in Europe by Transaction Mechanism



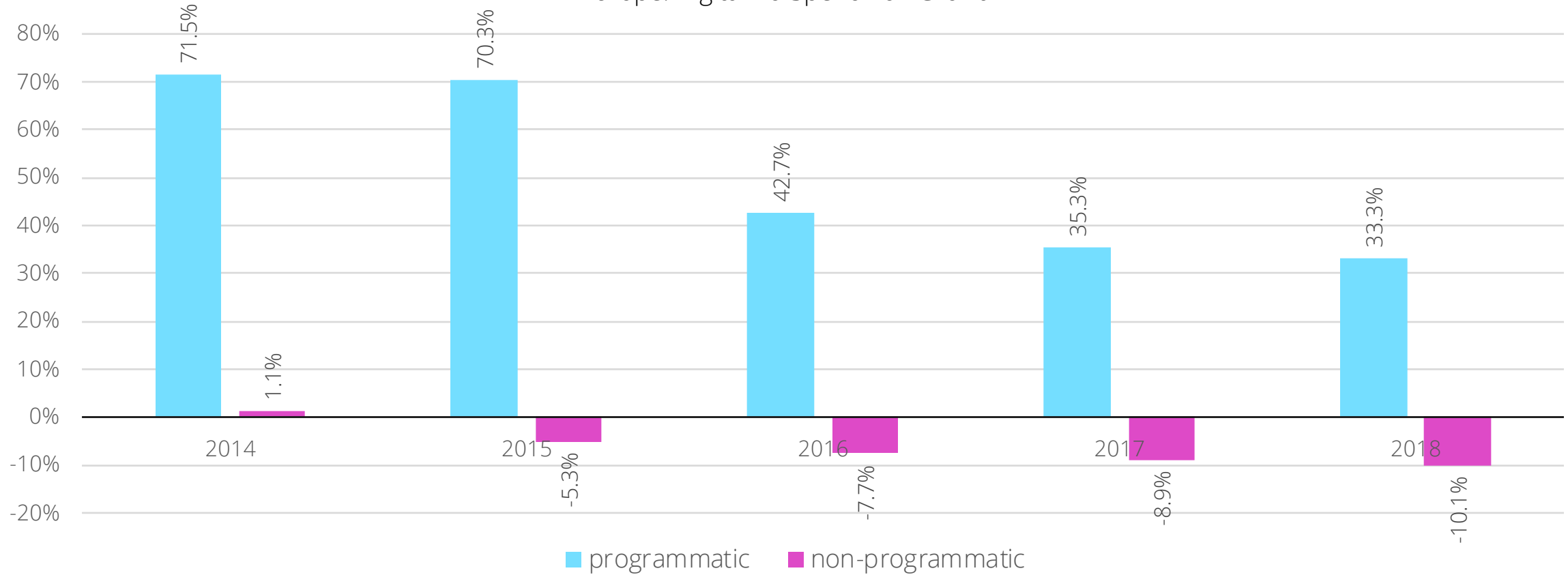
EUROPE HAS BEEN A PROGRAMMATIC-FIRST DIGITAL AD MARKET SINCE 2016

Europe: Digital Ad Spend by Transaction Mechanism



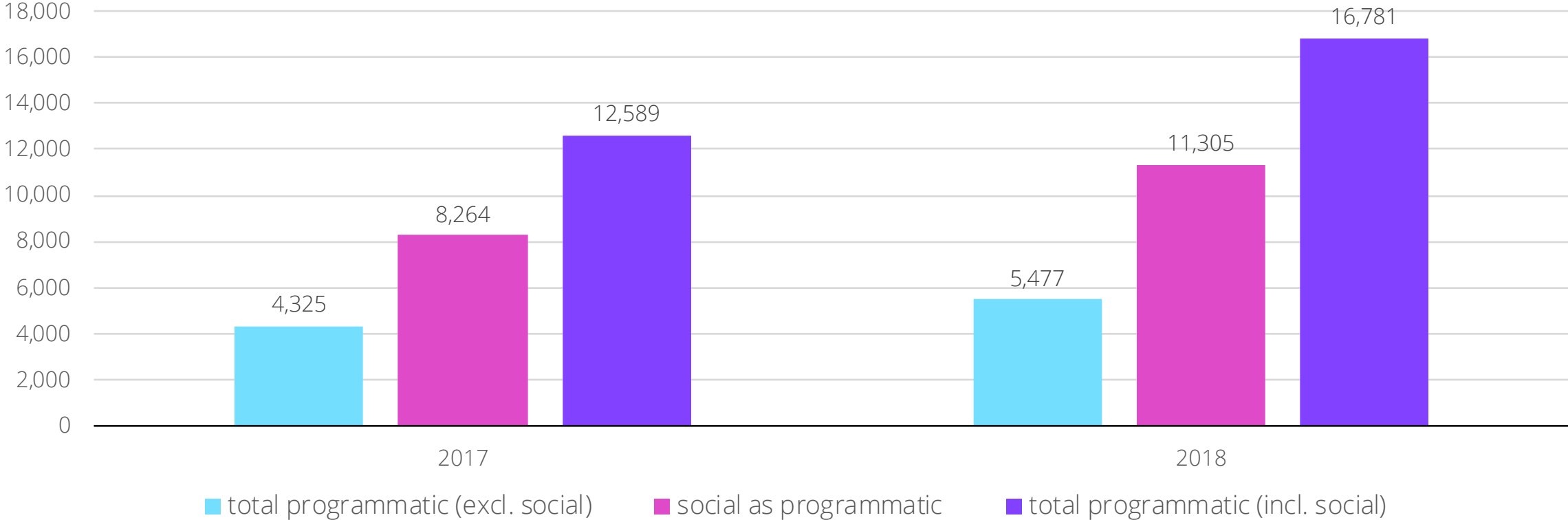
PROGRAMMATIC CONTINUES TO GROW DOUBLE-DIGIT DESPITE MARKET MATURITY

Europe: Digital Ad Spend YoY Growth



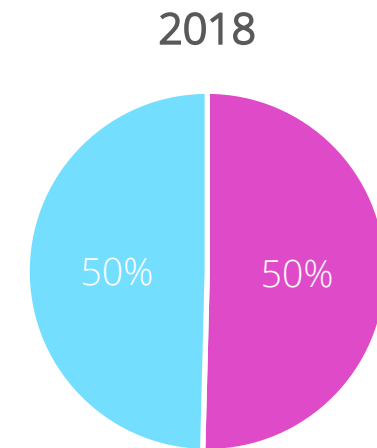
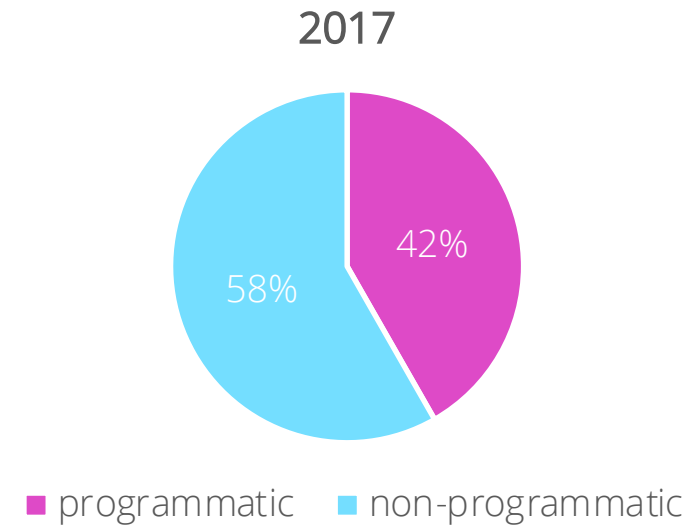
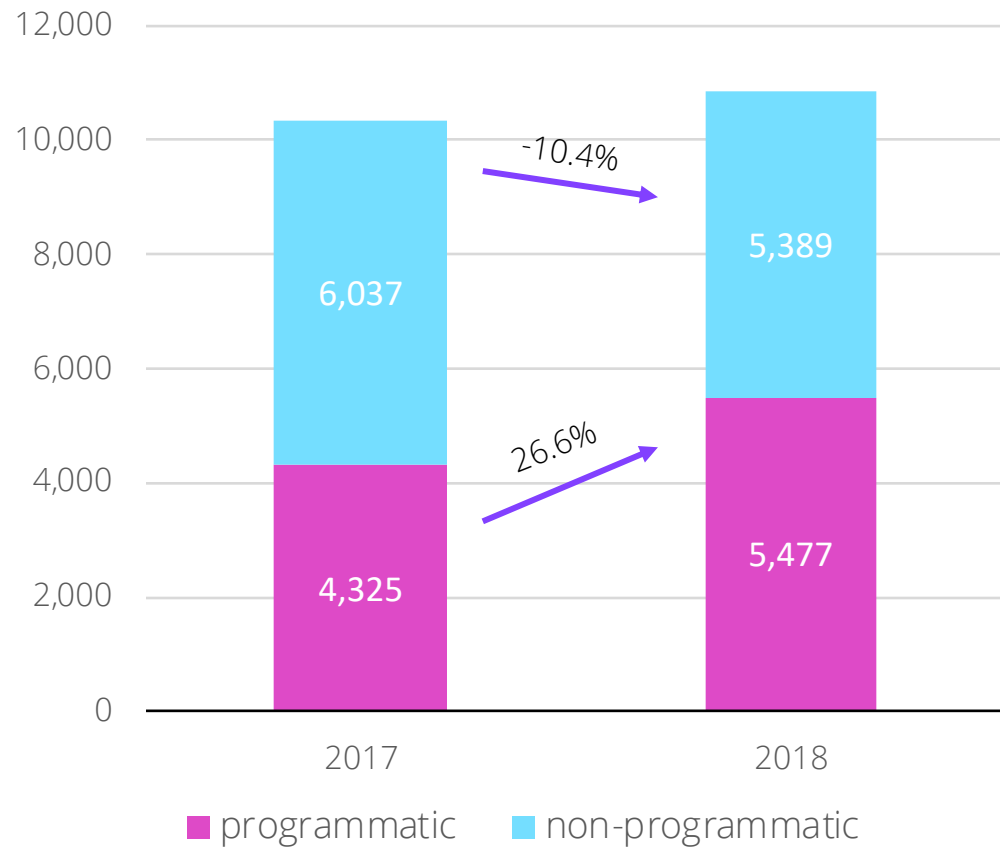
APPLYING A NARROWER DEFINITION : SOCIAL DOUBLE THE SIZE OF PROGRAMMATIC TRANSACTED VIA OPEN RTB STANDARD

Europe: Programmatic Ad Spend (EURm)



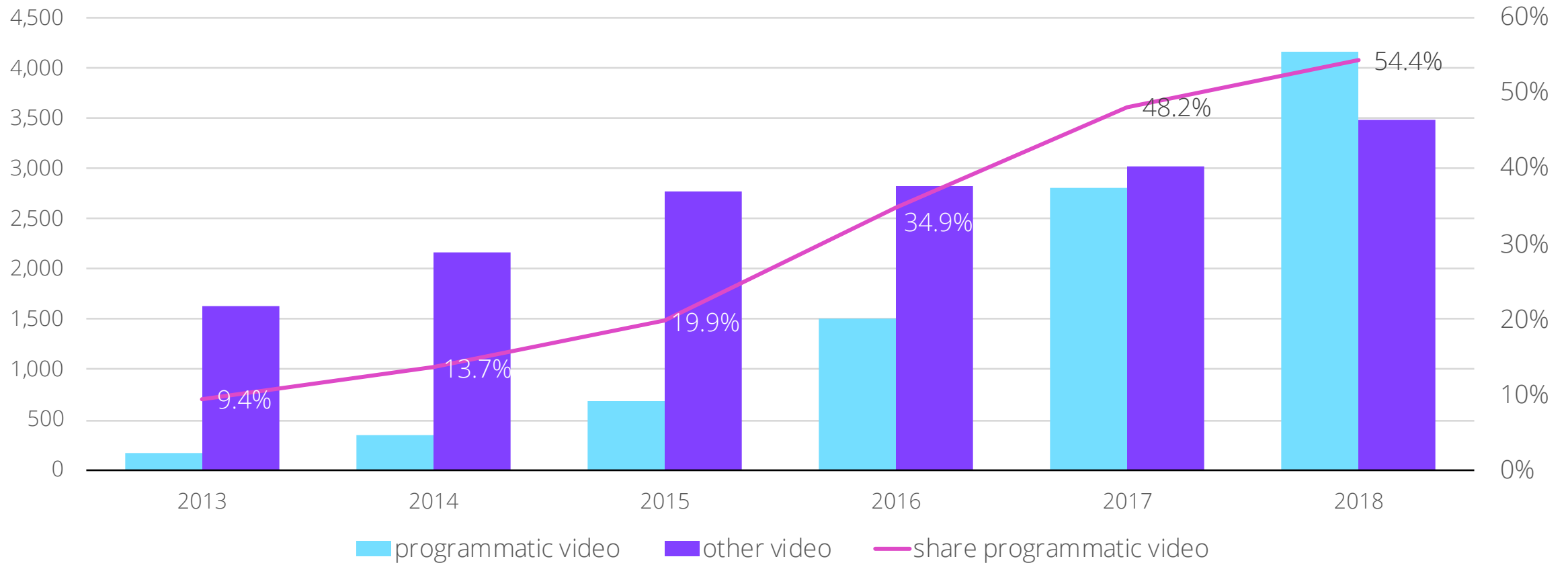
A NARROWER DEFINITION: GROWTH COMES FROM PROGRAMMATIC, NOW HALF OF DISPLAY

Europe: Programmatic Ad Spend excl. social (EURm)



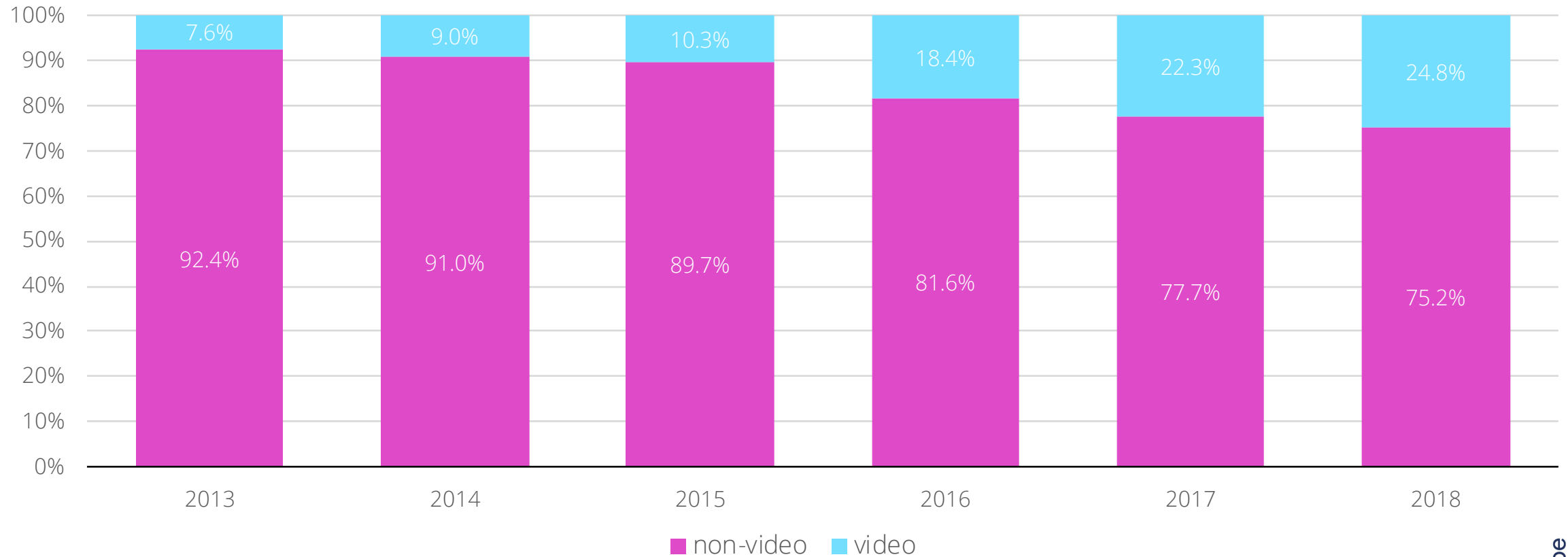
MORE THAN HALF OF ALL VIDEO SPEND IS PROGRAMMATIC

Europe: Digital Video Ad Spend by Transaction Model (EURm)



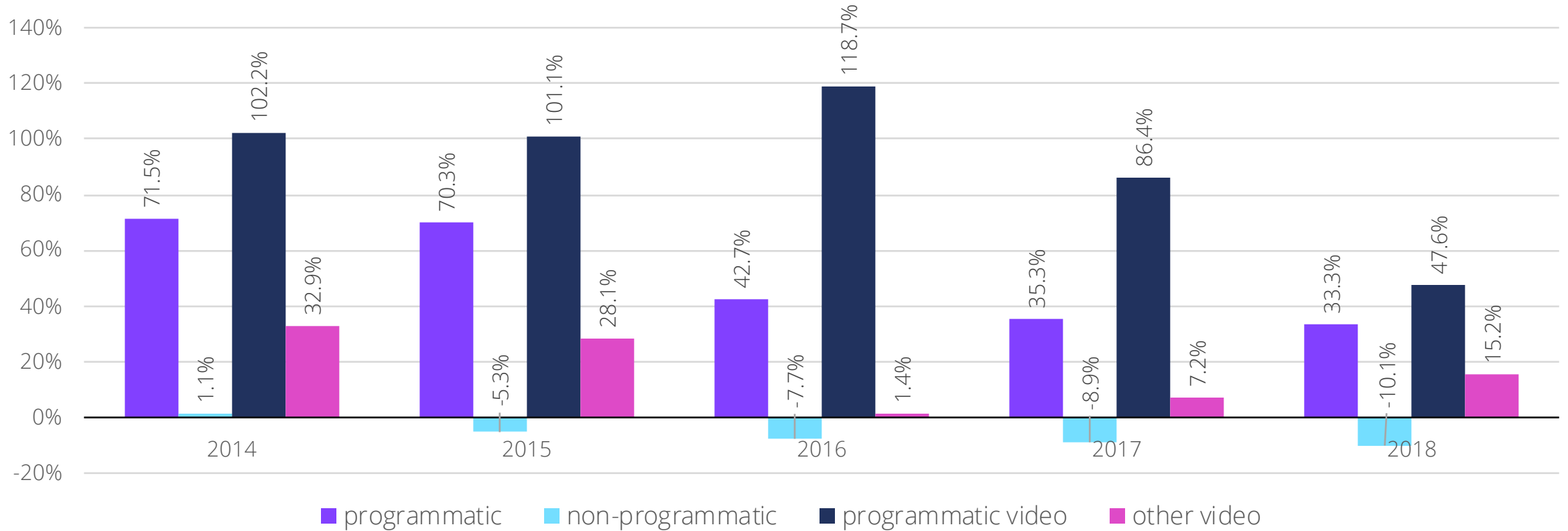
¼ OF ALL PROGRAMMATIC SPEND IS VIDEO

Programmatic in Europe: video vs other formats



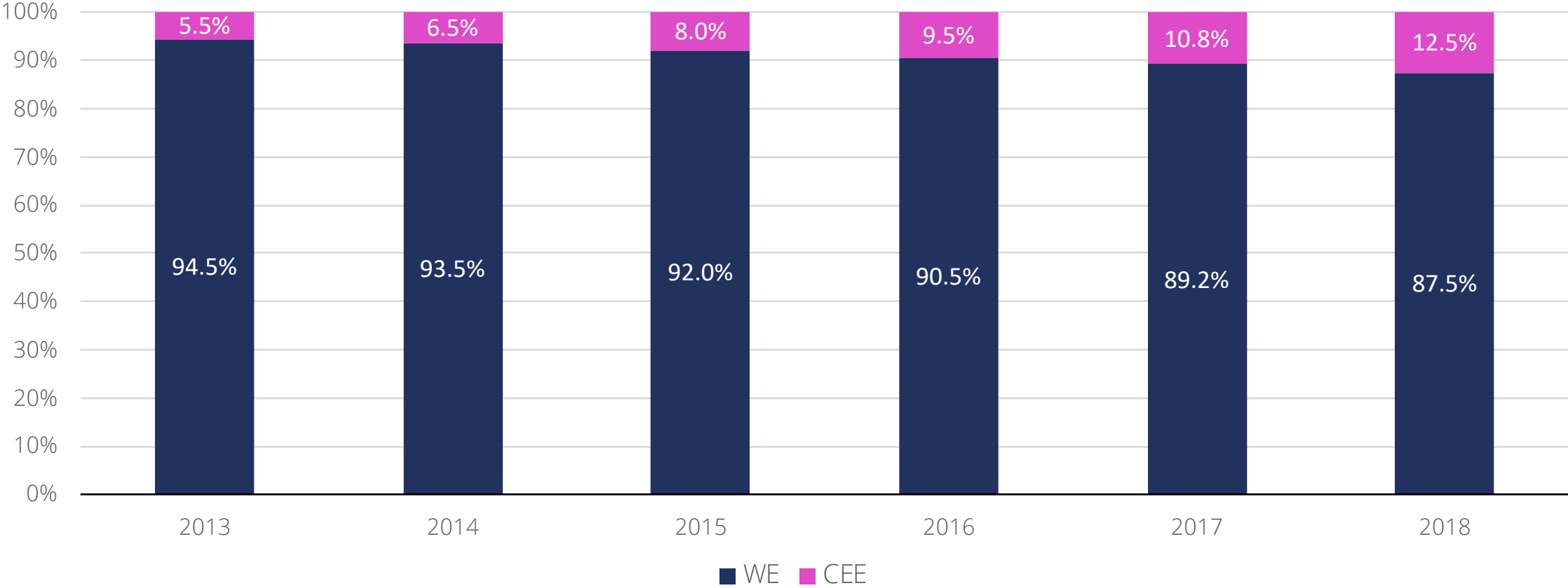
PROGRAMMATIC VIDEO GROWS FASTEST, BUT VIDEO OUTSIDE PROGRAMMATIC IS ACCELERATING

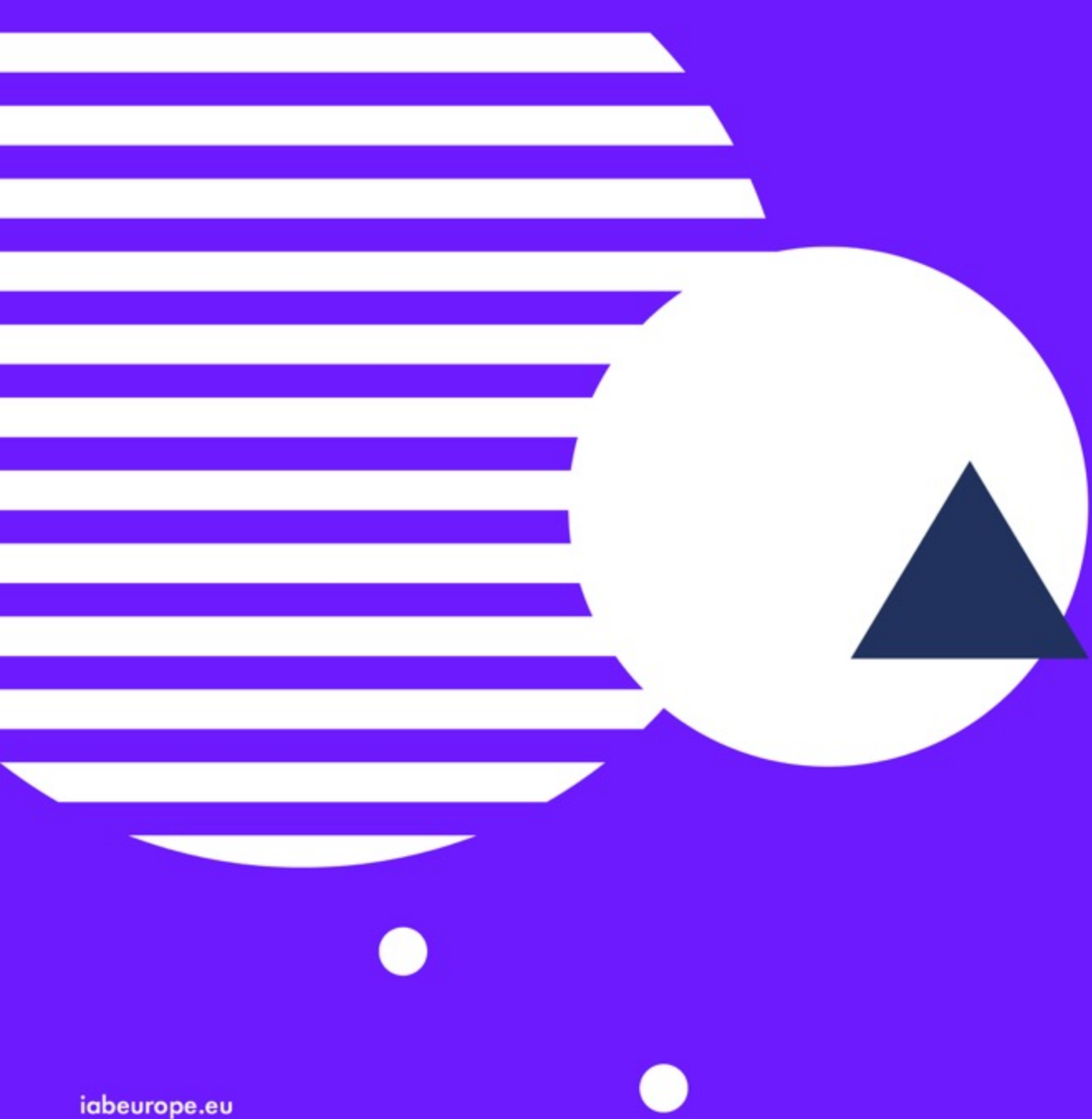
Europe: Digital Ad Spend Growth by Format & Transaction Model



CEE REGION IS ENJOYING 2ND MOVER ADVANTAGE, OUTPERFORMING GROWTH AND CLAWING SHARE

Europe: Share of Programmatic Ad Spend by Region





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