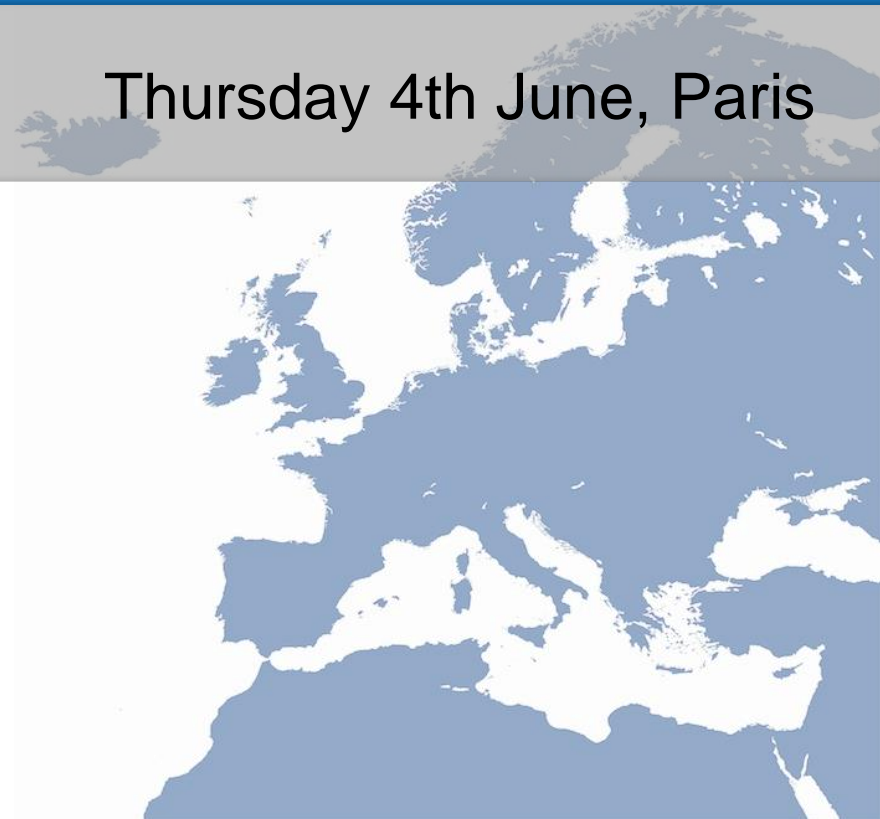


The World Media Group: International Comms Planning

Future of Programmatic
Alison Fennah, IAB Europe

Thursday 4th June, Paris



Today's agenda

- Introduction – IAB Europe and Programmatic
- Current Adoption of Programmatic Trading
- Operational Effectiveness
- European Advertising Spend and Programmatic Trading landscape
- Mobile, Video and Social
- A glimpse of next steps in adoption
- Summary and questions

IAB Europe Programmatic programme

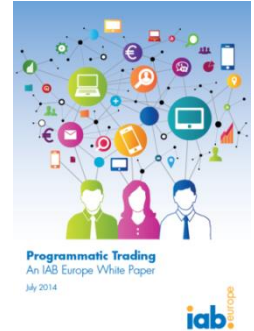
First pan-European Programmatic White Paper

Sizing of European Programmatic Market

Methodology workshops with local IABs to increase local roll out

Educational programme for different stakeholder groups including webinar series

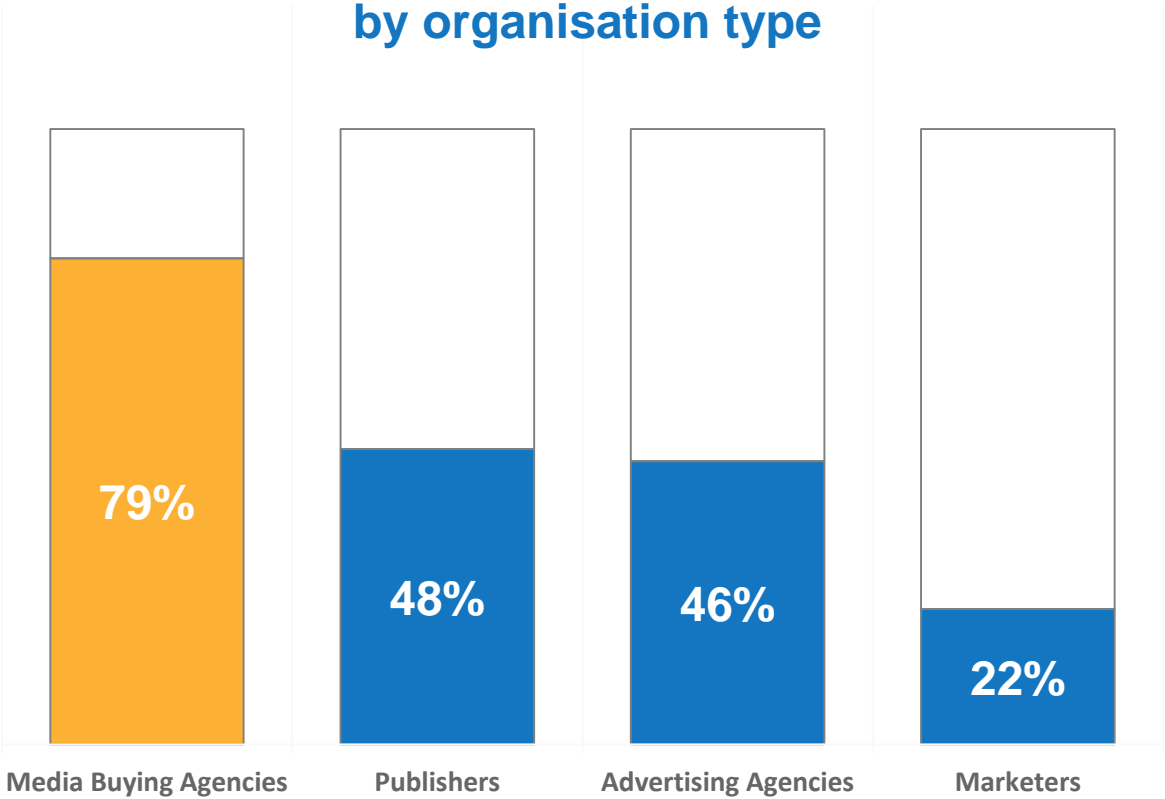
Attitudes to Programmatic Survey in field now and upcoming
Second White Paper



Current Adoption of Programmatic Trading

Current stakeholder adoption

Use of programmatic by organisation type



Operational Effectiveness

What does programmatic mean for sales?



Reduced time spent on administration and operations;
more time for client solutions



Improved execution process for all involved



Increased focus on high-touch sales engagements
and high-margin deals & packages



Automate and optimise smaller deals, volume buys,
and secondary inventory

What about ad operations?

From a focus
on trafficking
of campaigns

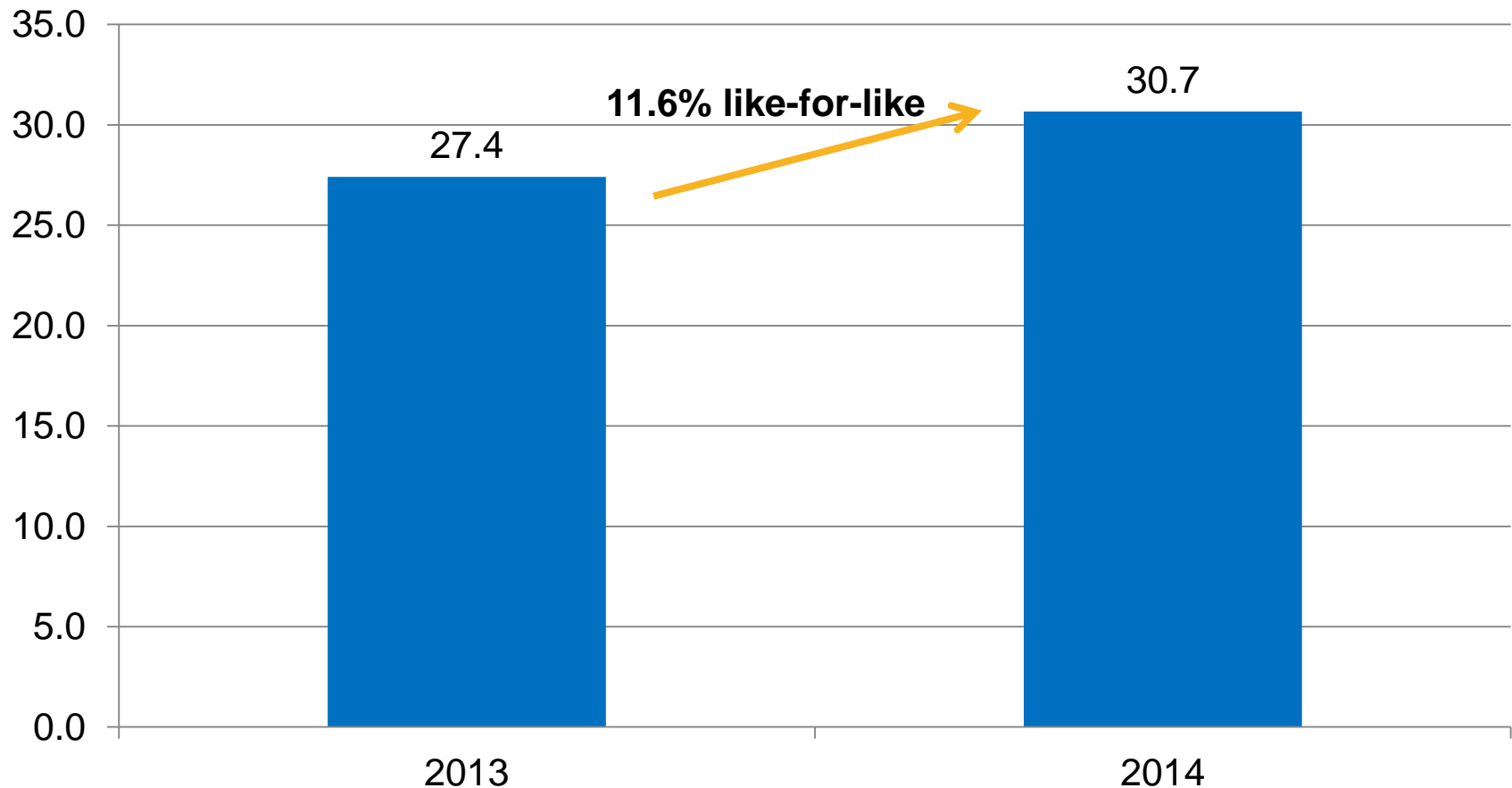
to...

- Emphasis on data collection, reporting, and performance analysis
- The first and last stop in yield optimisation
- Active price management for all sales channels
- Analysing and optimising: *people, process, tools*

European Advertising Spend and Programmatic Trading landscape

The value of online advertising in 2014

Total online advertising spend (€bn)



Online advertising revenue generated through programmatic mechanisms **exceeded €2bn** in 2013



2013 – €2,079m

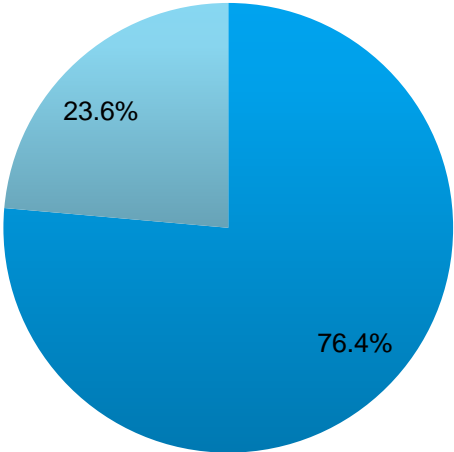
+111% year on year

2012 – €985m

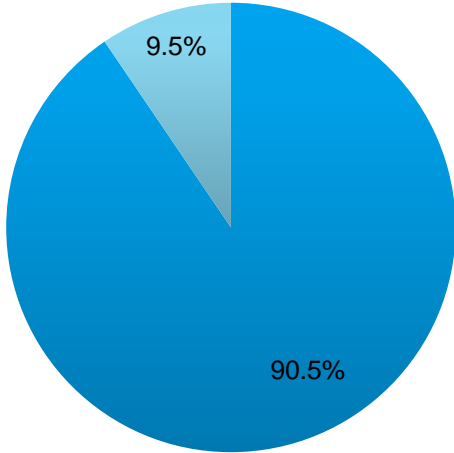


Display Programmatic in Europe

Western Europe 2013

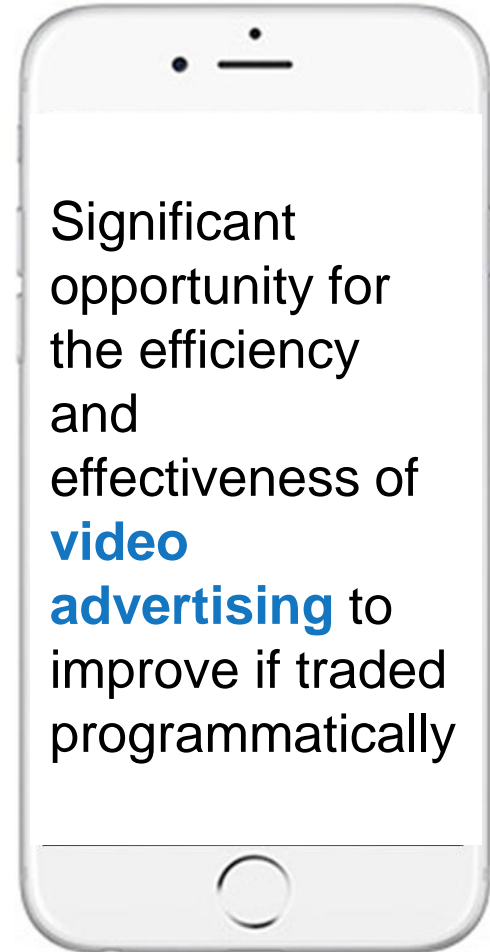
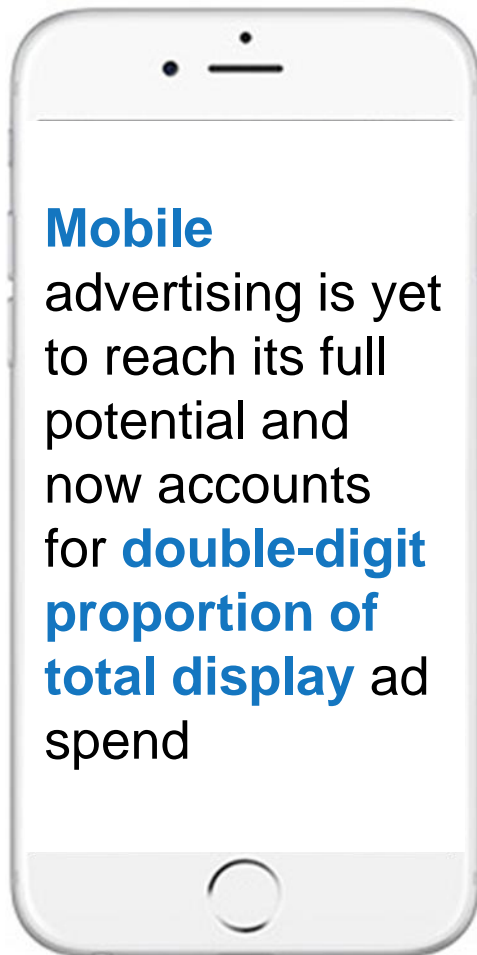


Central & Eastern Europe 2013



■ Non-Programmatic ■ Programmatic

Mobile, Video and Social



Next steps to Programmatic Trading Adoption

Reasons for Programmatic Trading investment

- Targeting efficiencies
- Lower cost of media
- Delivery of brand advertising campaigns at scale to target audience
- Gain competitive advantage
- Increased granular control of media
- Trading efficiencies

Barriers to adoption

- Hiring and training people with the right skill set
- Having a clear understanding of the impact of Programmatic trading on total revenue
- Selecting and setting up the right technology

Programmatic has matured **beyond RTB** to performance, deals and direct

Adoption is increasing across markets

Programmatic contributing to the **rise of video, mobile and social**

Lack of education is the biggest hindrance

Opportunity to **build brands**, at scale, across channels

'Programmatic Premium' - publishers are embracing programmatic, driven by private exchanges

Technology needs to evolve further for greater transparency and inventory discovery, and consistency in metrics and measurement

Contact

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