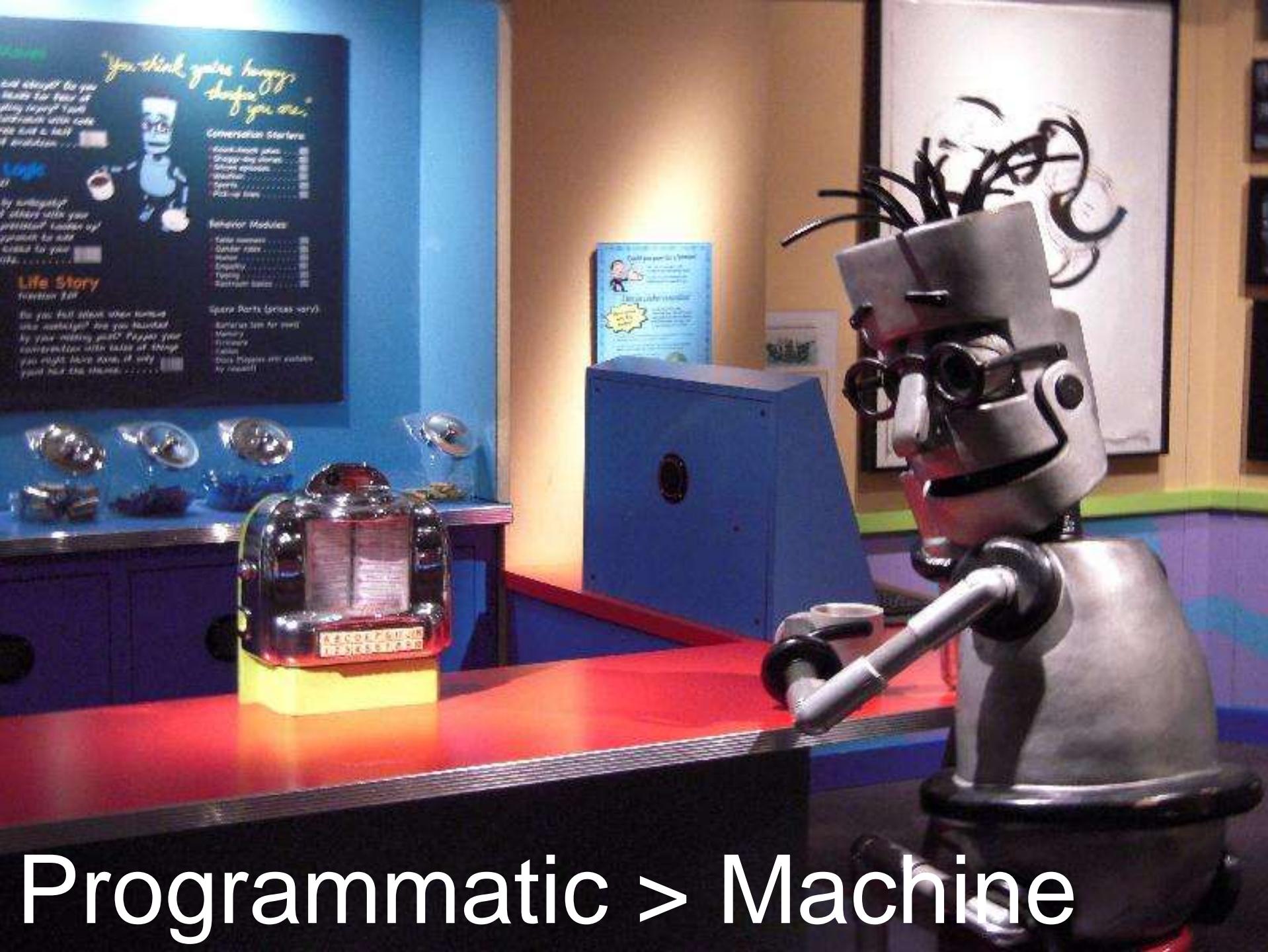




The Programmatic How To...

A toolkit for publishers





Programmatic > Machine

Programmatic creates

› New Business Opportunities

- › Re-evaluate current business models & **enhance** them with automation & Data
- › Introduce **new business models** (e.g. private marketplace, audience extension)
- › More monetization channels available – must work together and not against each other
- › **Local Publisher Alliances** – an answer to the global market dynamics

› Organizational challenges

- › Re structure according to the evolving skillsets needed
- › Select your **technology partners**

› The Data conundrum

- › What data do I own / can collect?
- › How do I use them?

› Change & Evolution

- › It's never easy
- › It's unavoidable
- › It's not replacing everything

Traditional Business Models

Data Layer

Technology Stack

In House Skills

Core
Business
Strategy

External Partners

SSP, DSP, DMP, BI, ...

Attributes, Segments, Audiences

Programmatic Business Models

DISPLAY LUMAscape

M A R K E T E R

Agencies

OmnicomGroup

WPP

PUBLICIS

IPG

Interpublic Group

HAVAS

A E G I S

MDC PARTNERS

AKQA

LBi

ROSETTA

epsilon

crossing/

Innovation

INTERACTIVE

MERKLE

camelot

at&t

Interactive

yodel

ReachLocal

WebVisible

Agency Trading Desks

Accuen
The Trading Desk

XAXIS

VivAKi

CADREON

RUN> adnetik

accordantmedia

MIRICKMEDIA

Creative Optimization

Iteracent

adroit

struq

choice@stream

flaunting

MIXPO

snaps

adacado

i promote

STEELHOUSE

@ spongecell

Ad Ready

richrelevance

AdISN

Retargeting

dotomi

criteo

Tellapart

Chango

fetchback

ReTargeter

AdRoll

Simplifi

STEELHOUSE

buysight

crossmedia

MAGNE+IC

mediaFORGE

Ad Servers

doubleclick

atlas

mediaplex

mediamind

adform

pointroll

mediaplatforms

Verification /

Privacy

DoubleVerify

adsafe

AD XPOSE

ANCHOR

Ad-Juster

admetrix

The Media Trust

privacychoice

EVIDON

DSPs

MediaMath

invitemedia

TURN

DataXU

EfficientFrontier

TRIGGIT

thetradedesk

BRANDSCREEN

adz

appnexus

Exchanges

doubleclick

by Google

rightmedia

casalex

adBrite

adMob

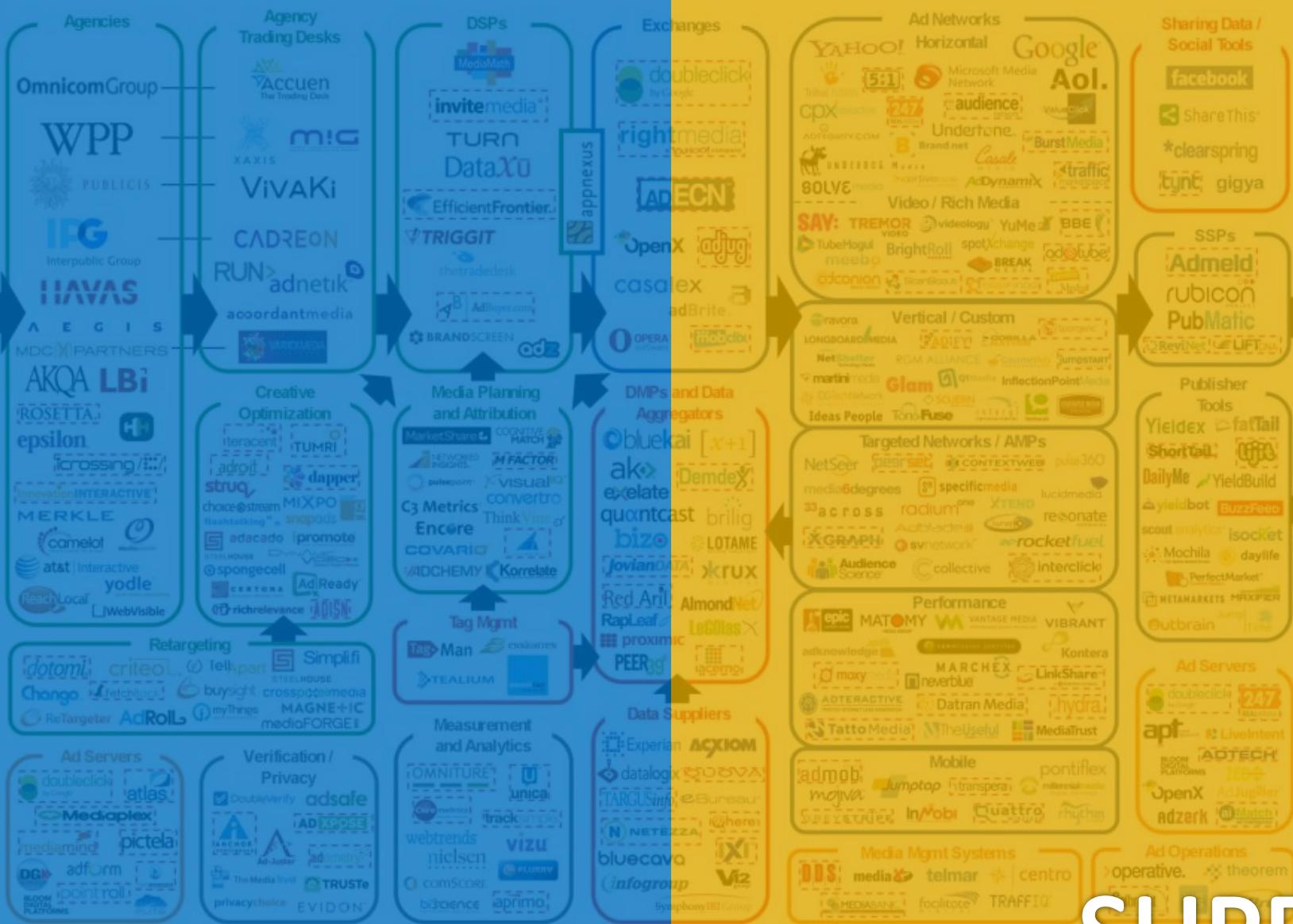
mobclick

adOpera

adMob

DEMAND

M A R K E T E R



SUPPLY

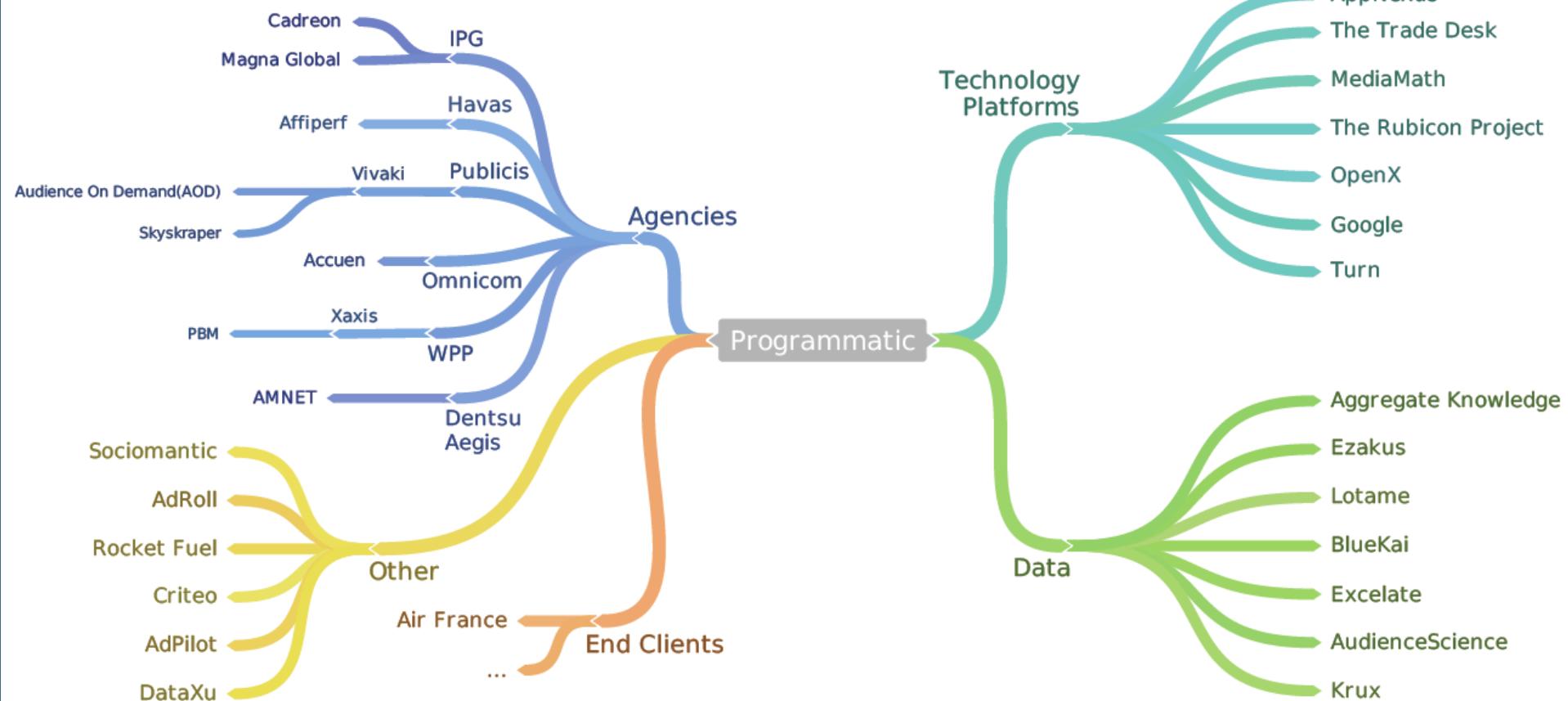
The market stakeholders

- › Large **international players** have emerged
 - › Global Internet media companies
 - › Global Advertising Agency Groups
- › These international entities are **ideal trading partners** because of their **size** and **offer** and have **disrupted local** traditional media companies
- › Emergence of smaller agencies & publishers increases **fragmentation**
- › **Display** advertising budgets are **on the rise** globally although not still commanding the proper share based on Display SOV

The technology evolution

- › New technologies coming of age
 - › RTB
 - › Big Data
 - › Viewability / Visibility
- › Global **technology & infrastructure providers** have emerged
- › **Programmatic trading** is rapidly growing globally
 - › Adopted by large global media companies
 - › Embraced by medium – small advertisers
 - › Strategically selected by big agency groups
- › All the major global players are building **centralized technology capabilities**
- › The digitization of traditional media (TV, radio, outdoor) has already begun

A complex ecosystem



Trading Models



Flavors of Programmatic



Know Thy Buyer...

What are the Buyers looking for?

BRAND

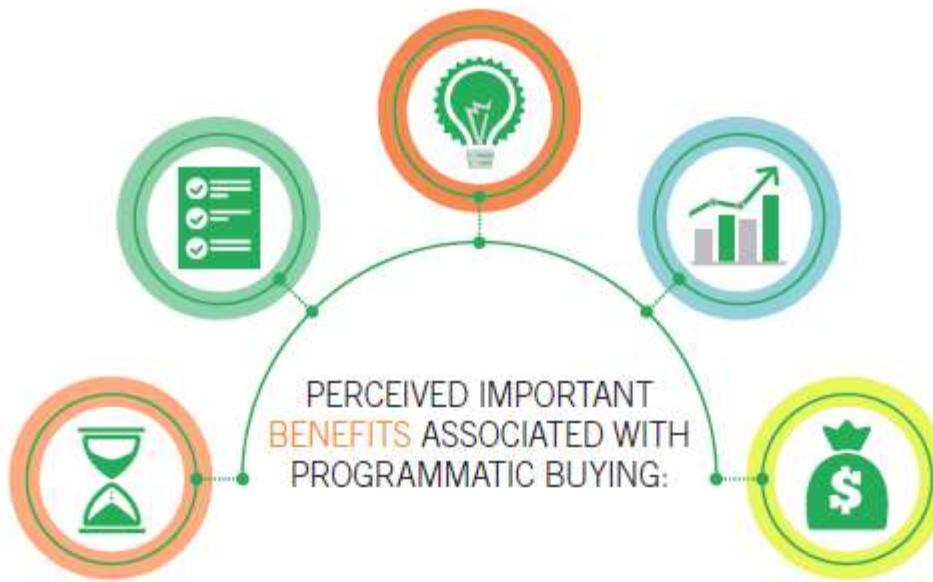
- › Safety
- › Transparency
- › Custom Solutions
- › High impact formats
- › Relevant & comparable results
- › Audiences

PERFORMANCE

- › Specific Actions
- › Goals
- › Efficiency
- › Data

What are the Buyers looking for?

USERS OF PROGRAMMATIC BUYING
ARE CLEAR ON ITS MANY BENEFITS.



76% **Real-time optimization**
76% **Better targeting**
68% **Decreased media cost**
59% **Managing channel buys**

58% **Dynamic ad placement**
51% **Access to broader options**
50% **Faster execution**

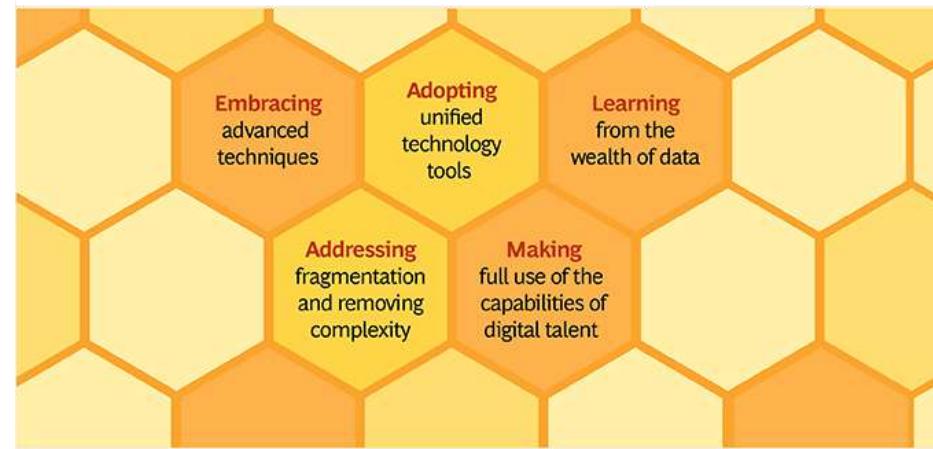
What are the Buyers looking for?

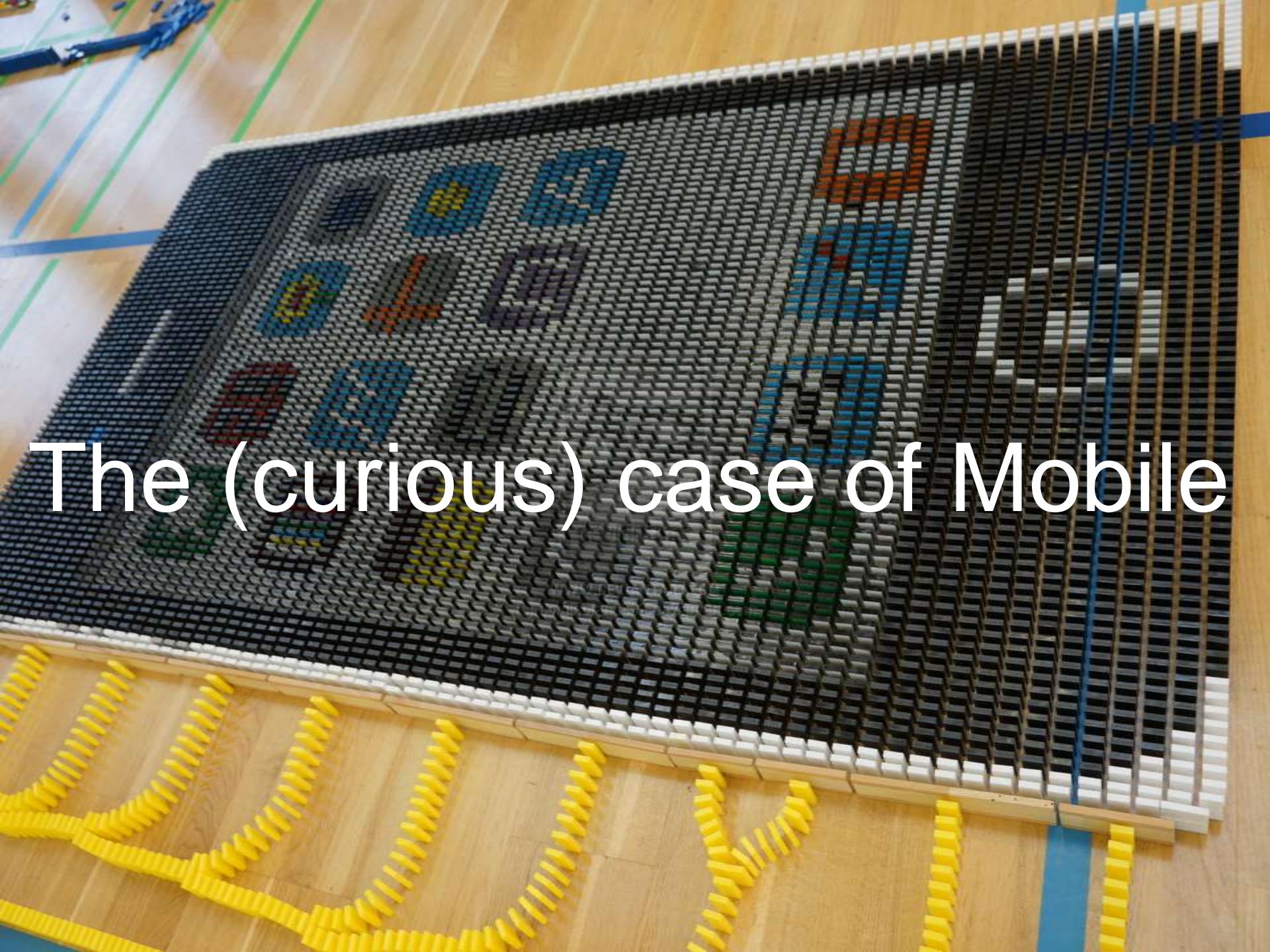
The evolution of online advertising

Advanced targeting and engagement techniques represent a step change in digital advertising's effectiveness



For advertisers and their agencies, better performance can be achieved by





The (curious) case of Mobile

Advertising Real-Estate



Personal Context



The (curious) case of Mobile

› Mobile?

- › Smartphone
- › Tablet

› Conduit

- › Mobile Web
- › In App

› Format???





The Window of ... Opportunities

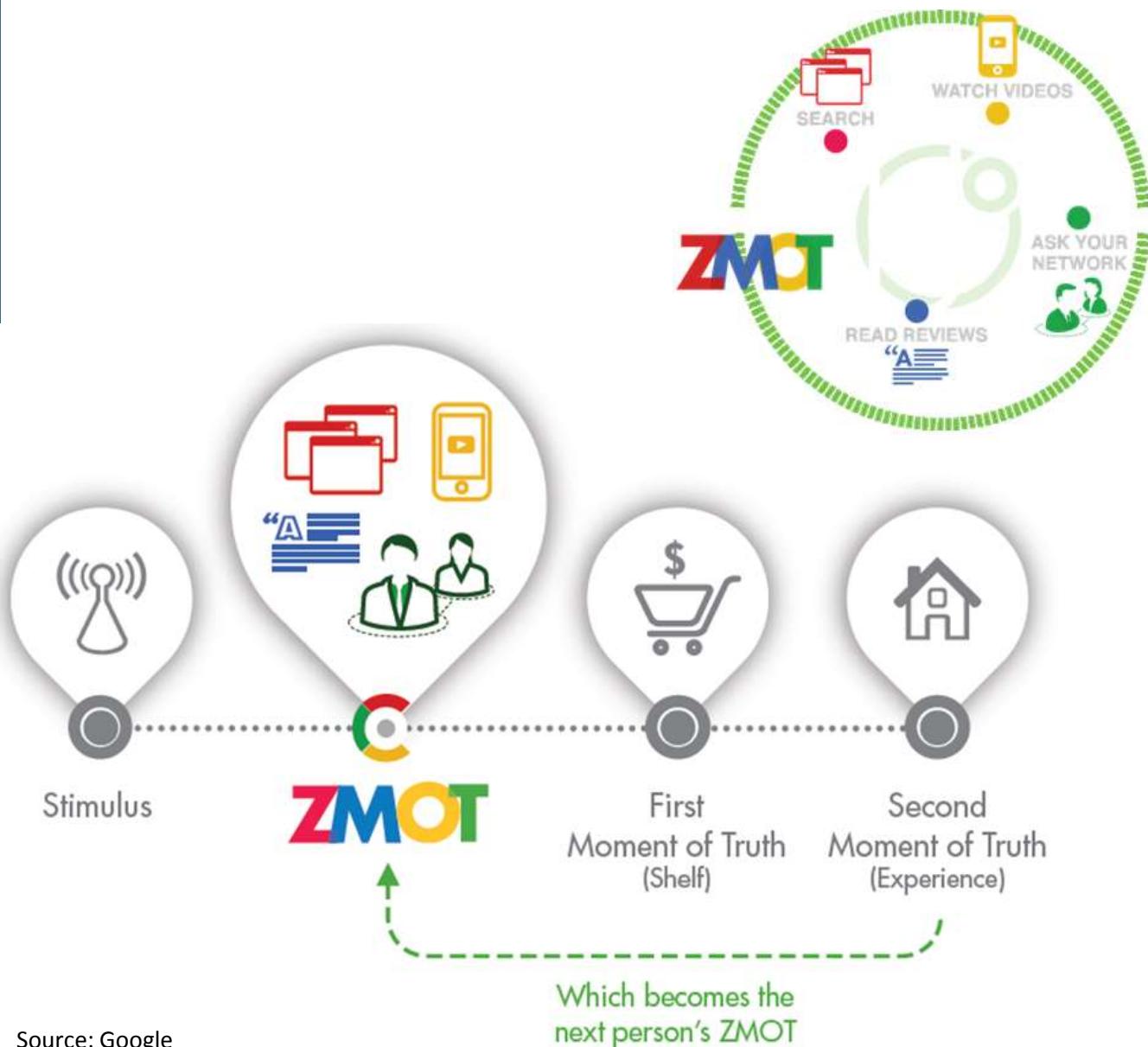
Your Unique Competence #1



The Zero Moment of Truth refers to all the research consumers do online before making a purchase.

The internet has empowered people to know more about the product they're going to buy, than the person selling it to them.

Your Unique Competence #1

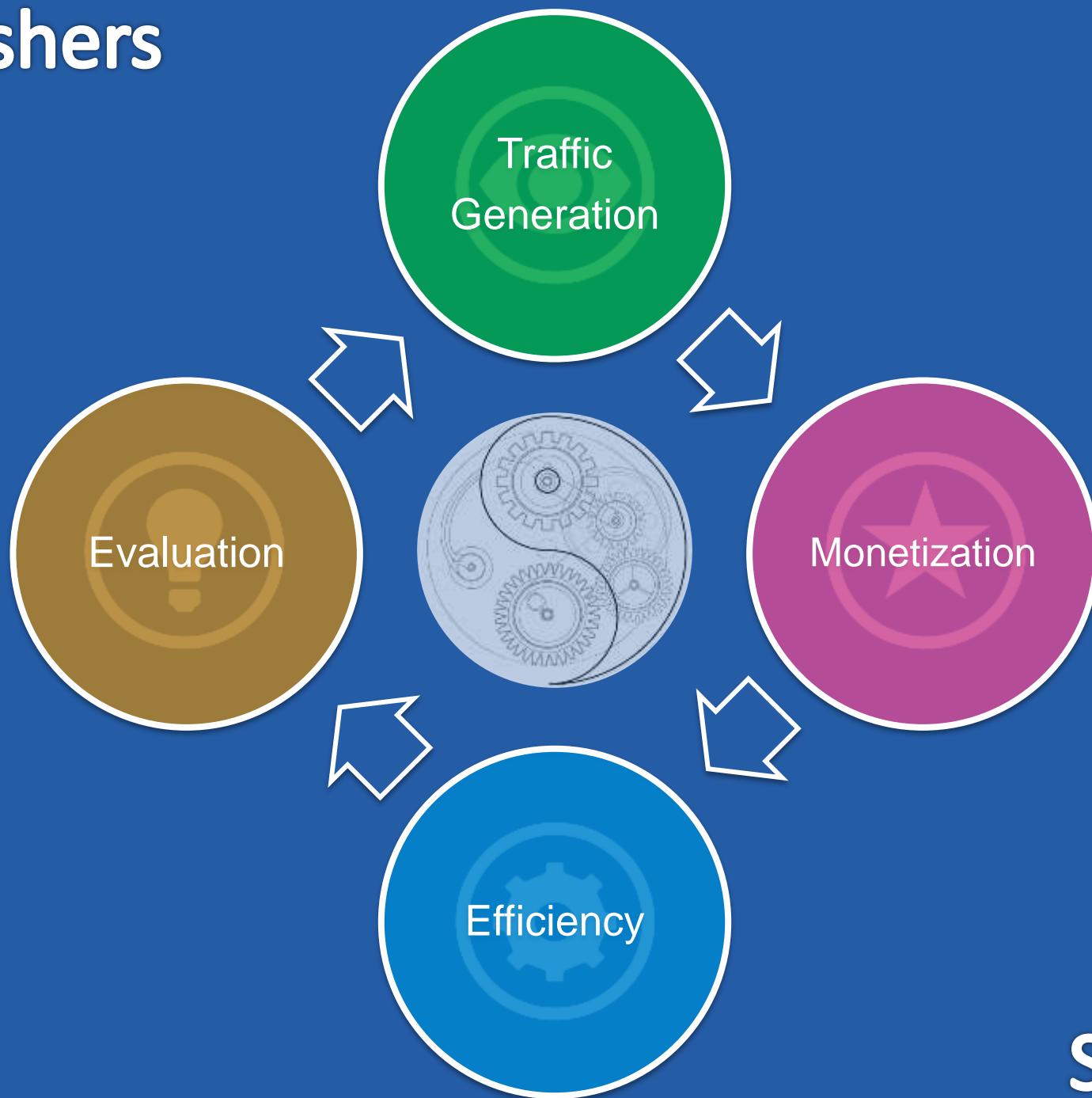


Your Unique Competence #2



Cross Device Targeting!

Publishers



Supply

Opportunities

- › Additional Buyers for your existing inventory
- › Audience Extension
- › Leverage Mobile specific data points (e.g. location, carrier, device type, OS)
- › Properly Connect your screens!!!
- › High Impact / Engagement Formats
- › Fresh (ZMOT) Data ;-)
- › You're also advertisers!!! (think DSP)

Final thoughts

- › **Mobile is**
 - › A platform to deliver advertising (a screen)
 - › An excellent data pool
 - › An additional element in creating a “walled garden”
- › **Programmatic is** an additional trading paradigm. You must decide how & where it fits within your overall monetization strategy.
- › Putting both together **you should**
 1. Prepare via the adoption of proper technologies & selection of partners
 2. Embrace via business models & people skills development
 3. Decide on a data strategy
 4. Play the game!

Thank You!



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