



Programmatic Advertising: The Automation that's Dominating Digital

PRESENTED BY **INSIDER**
INTELLIGENCE | **eMarketer**

TODAY'S PRESENTER



Evelyn Mitchell

Analyst

INSIDER
INTELLIGENCE

eMarketer

AGENDA

01 Definitions

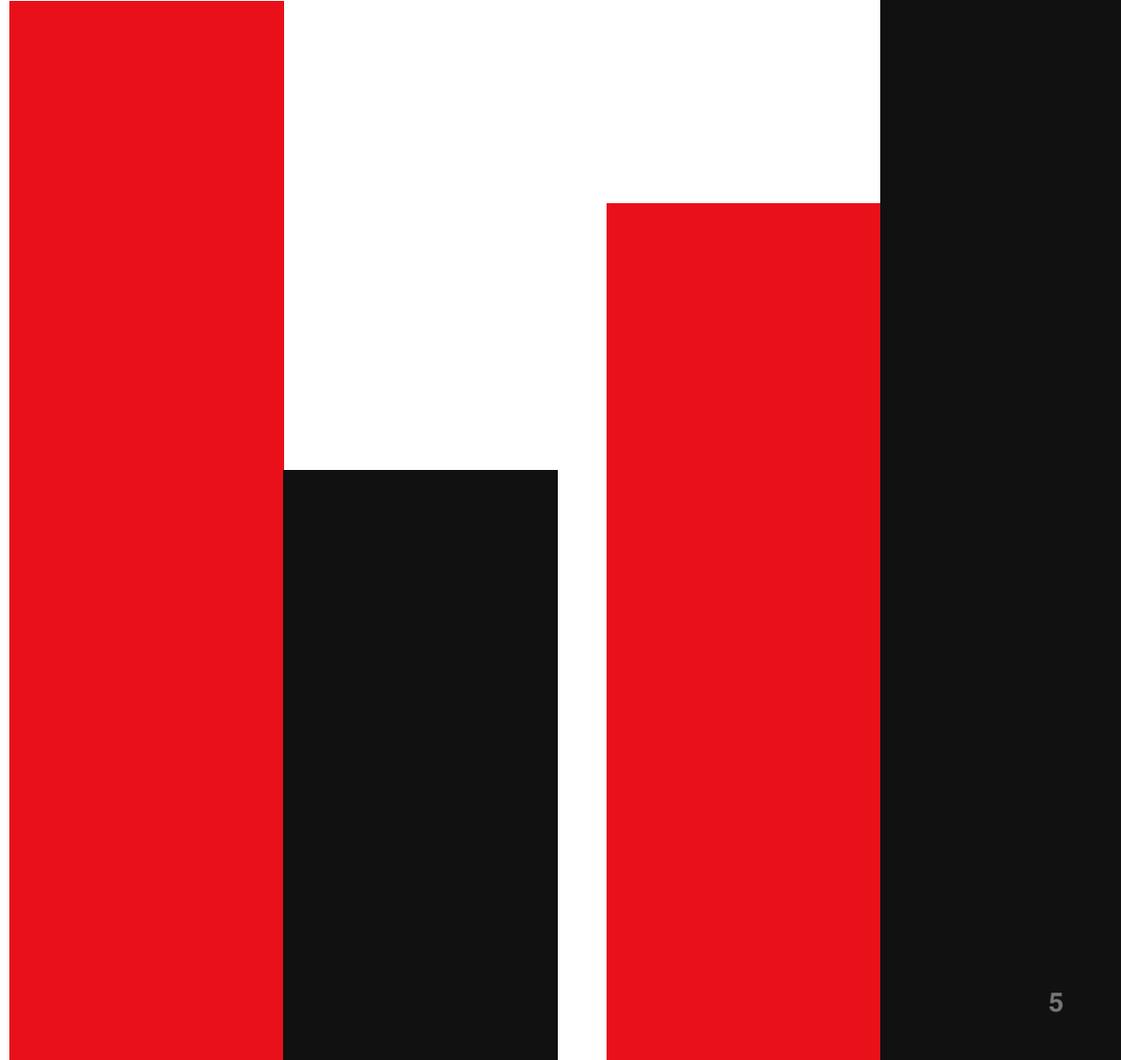
02 Spending by Format

03 Spending by Device

04 Spending by Transaction Type

05 Emerging Channels

06 Major Trends & Questions



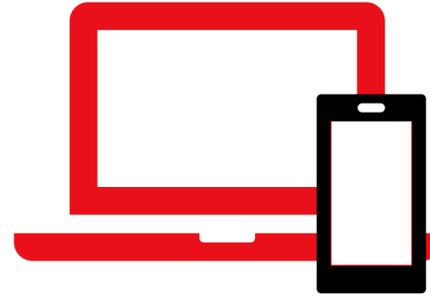


01

Definitions

Programmatic advertising includes any ad that is **transacted or **fulfilled** via **automation**.**

DEFINITION



DIGITAL DISPLAY
INCLUDES ...



DIGITAL VIDEO



DIGITAL AUDIO

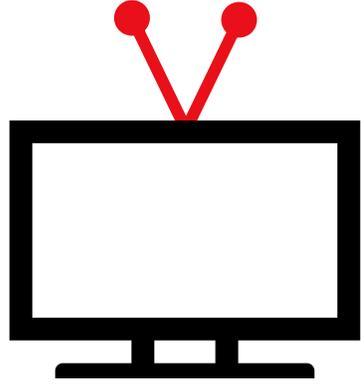


CONNECTED TV (CTV)

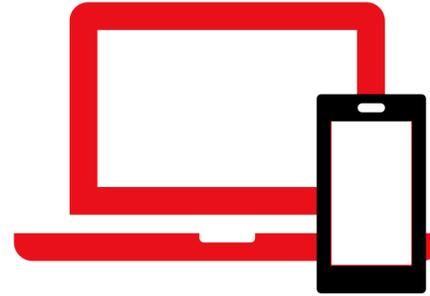
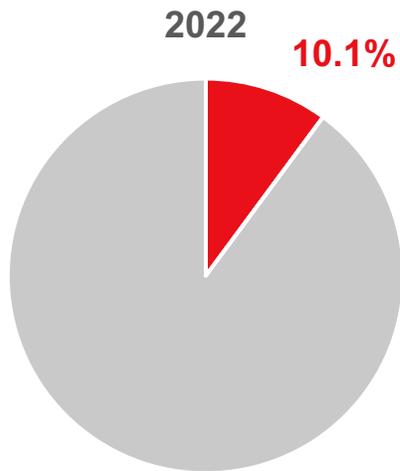


PODCASTS

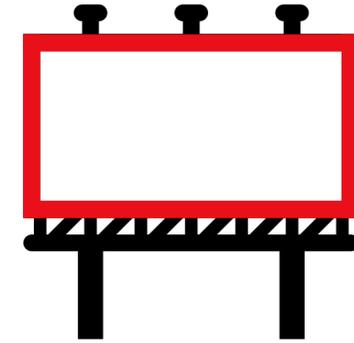
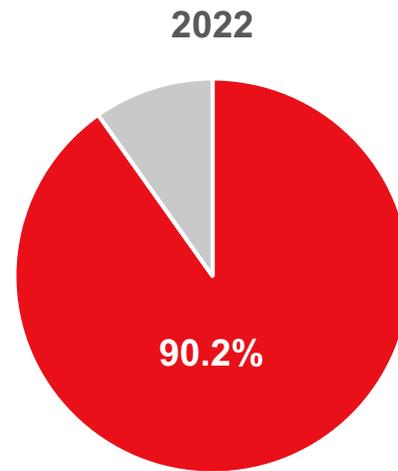
DEFINITION



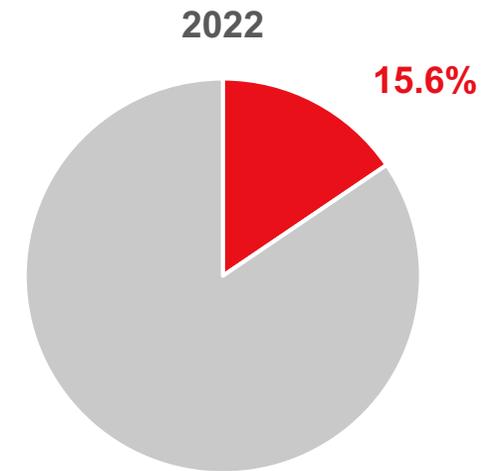
LINEAR TV



DIGITAL DISPLAY

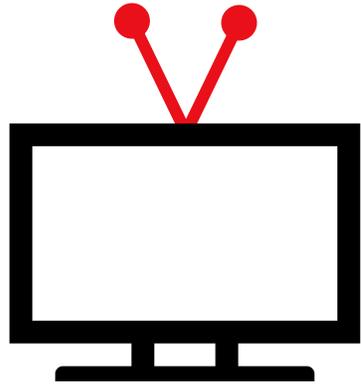


DIGITAL OUT-OF-HOME

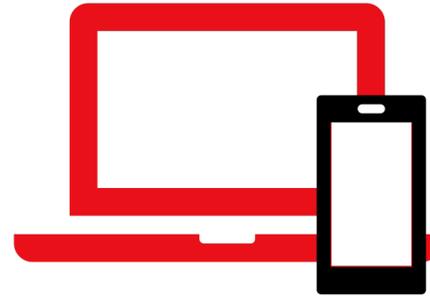
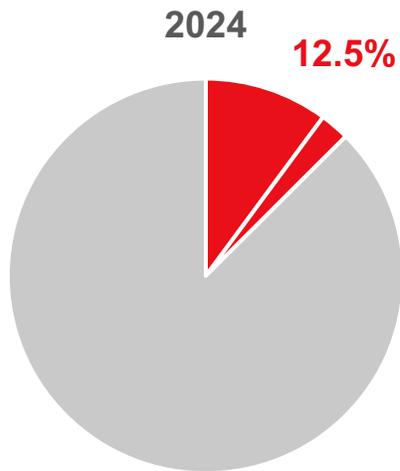


■ Programmatic ■ Nonprogrammatic

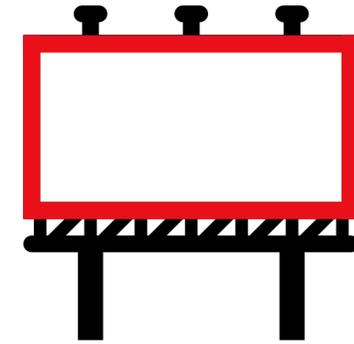
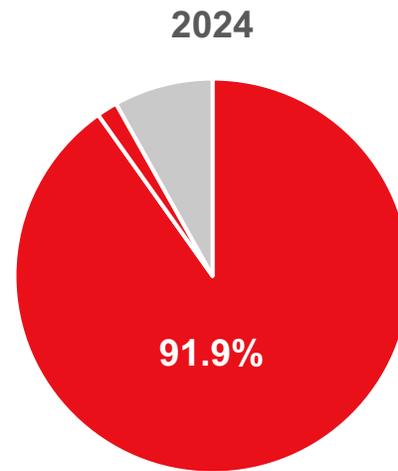
DEFINITION



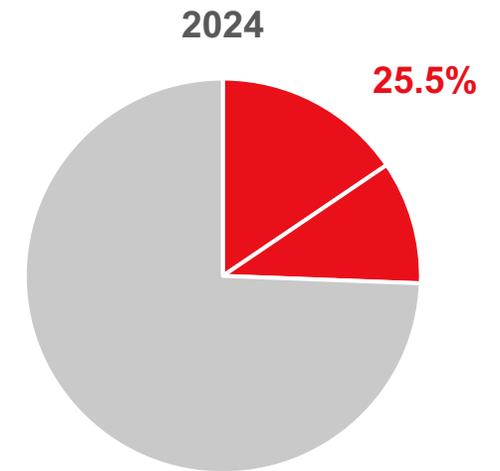
LINEAR TV



DIGITAL DISPLAY



DIGITAL OUT-OF-HOME



■ Programmatic ■ Nonprogrammatic

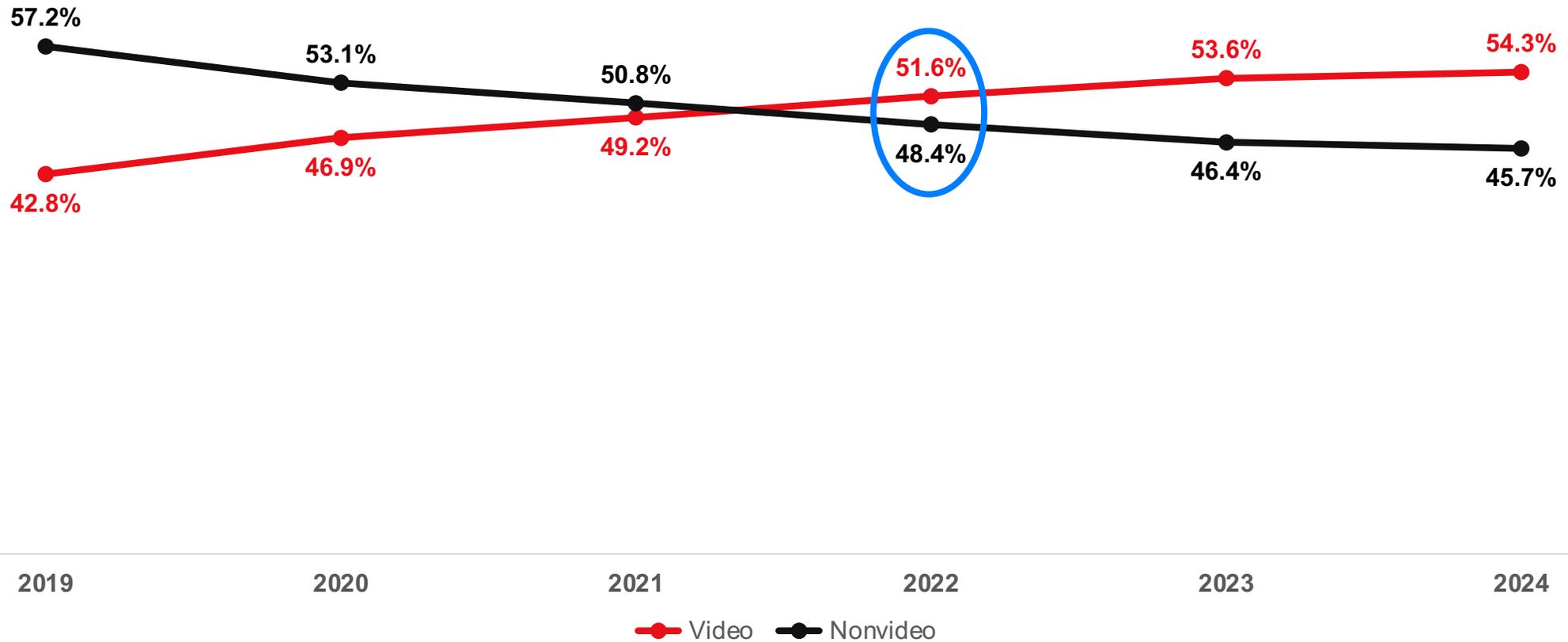
02

Spending by Format



US Programmatic Ad Spending Share, by Format, 2019-2024

% of total programmatic digital display ad spending



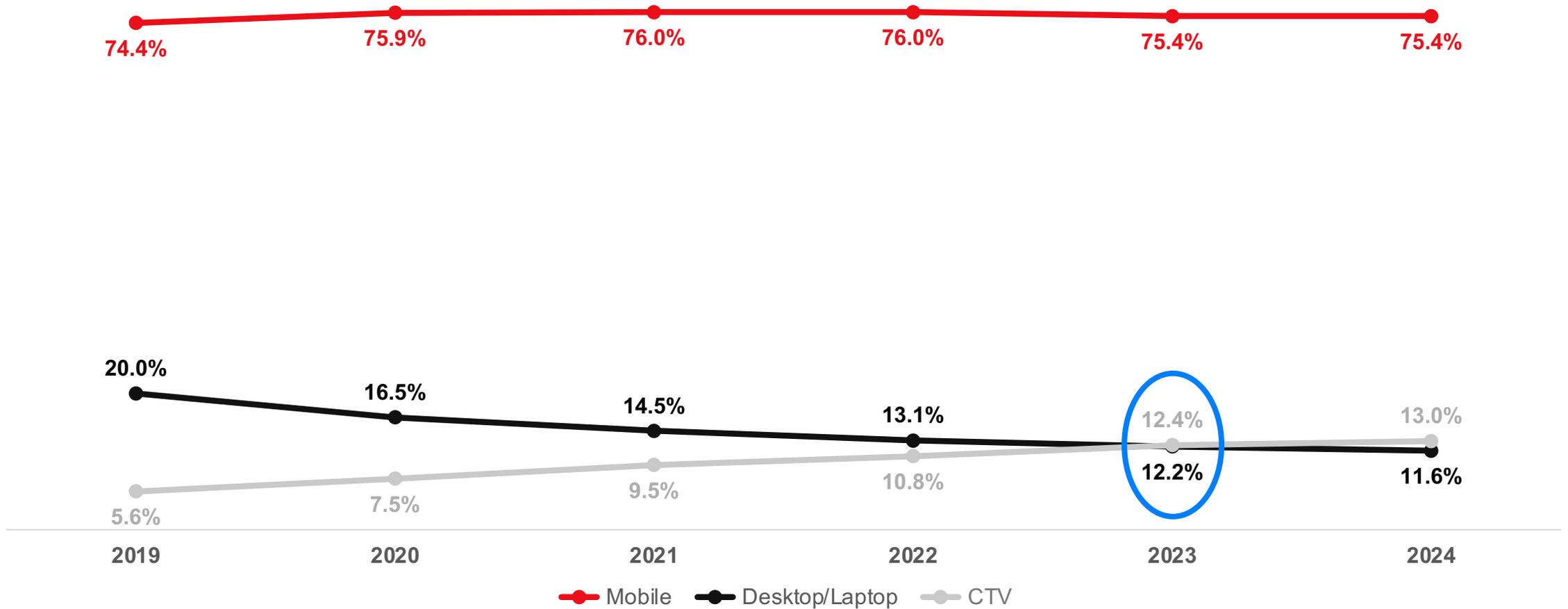
03

Spending by Device



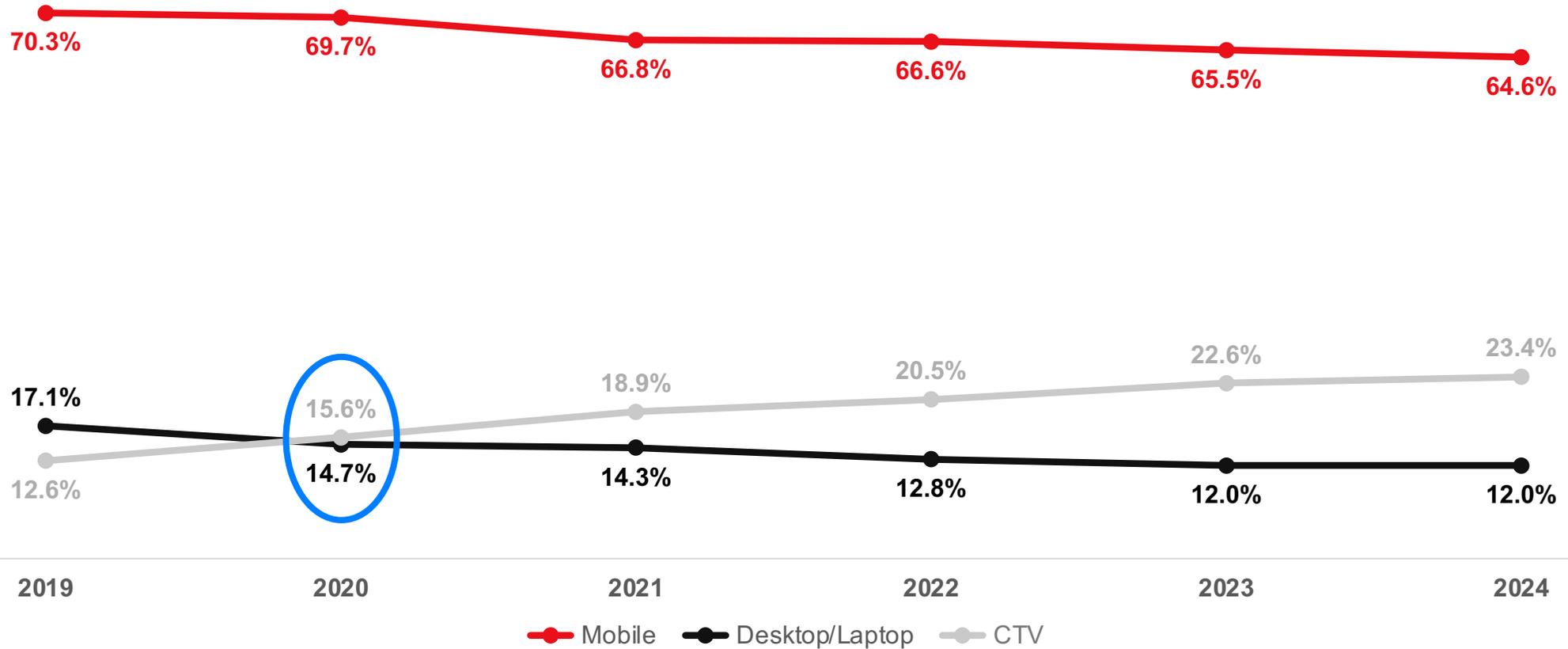
US Programmatic Ad Spending Share, by Device, 2019-2024

% of total programmatic digital display ad spending



US Programmatic Ad Spending Share, by Device, 2019-2024

% of total programmatic **video** ad spending



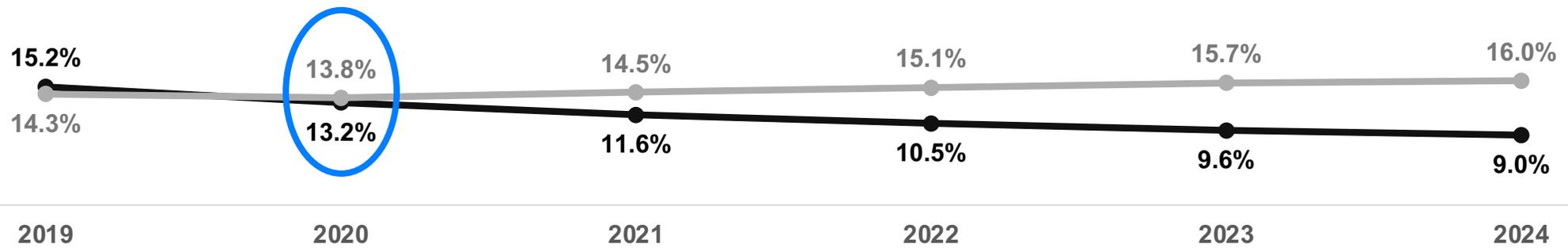
03

Spending by Transaction Type



US Programmatic Ad Spending Share, by Transaction Method, 2019-2024

% of total programmatic digital display ad spending



● Direct ● Open Exchange ● Private Marketplace

Why PMPs?

(Perceived) Benefits



Preservation of buyer-seller relationships



Inventory quality assurance



Protection against ad fraud



Insulation against brand safety risks

Growth in CTV



Most programmatic ad spending in CTV occurs via programmatic direct and private marketplace (PMP) deals.



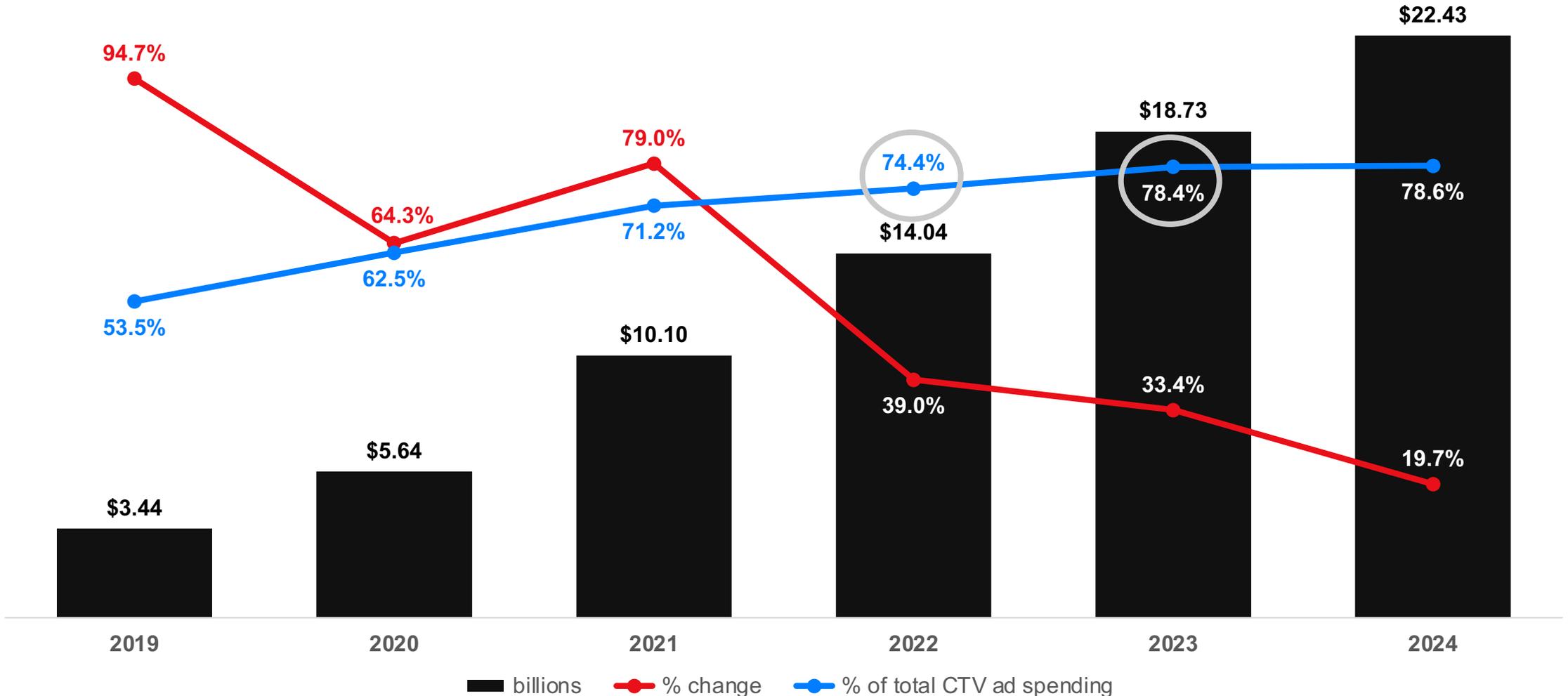
05

Emerging Channels



Connected TV Programmatic Display Ad Spending, 2019-2024

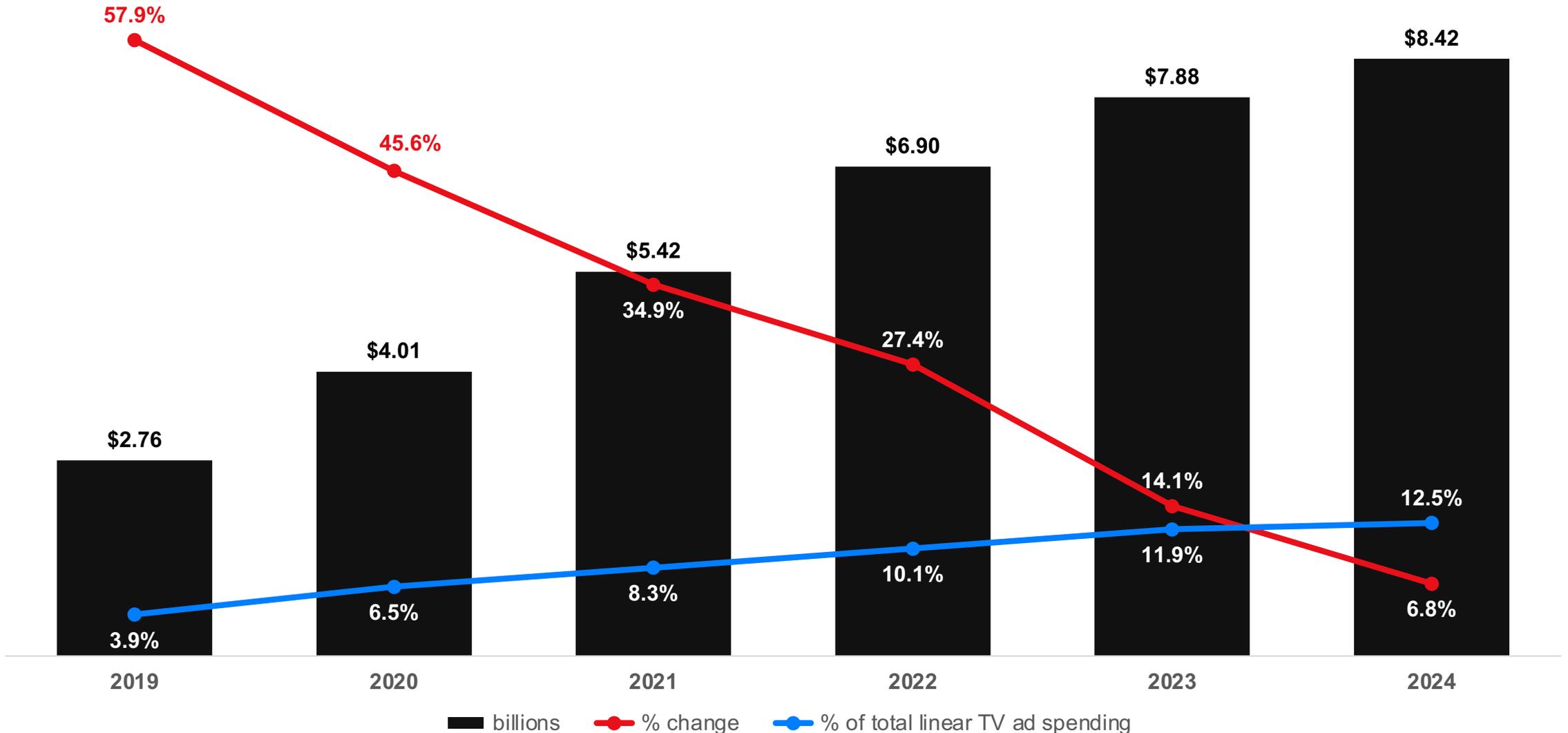
billions, % change, and % of total CTV ad spending

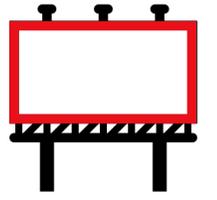




Programmatic Linear TV Ad Spending, 2019-2024

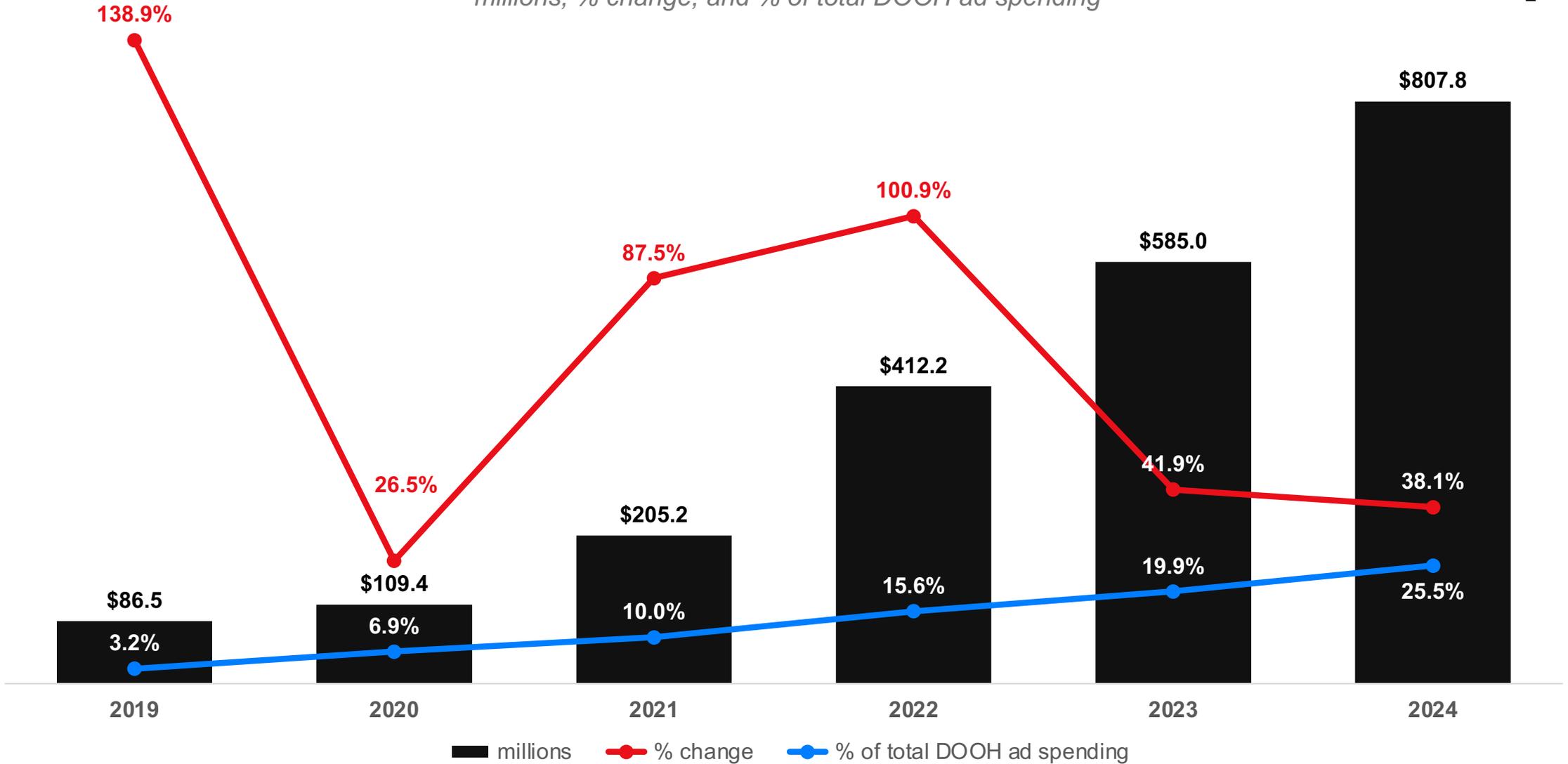
billions, % change, and % of total linear TV ad spending





Programmatic Digital Out-of-Home Ad Spending, 2019-2024

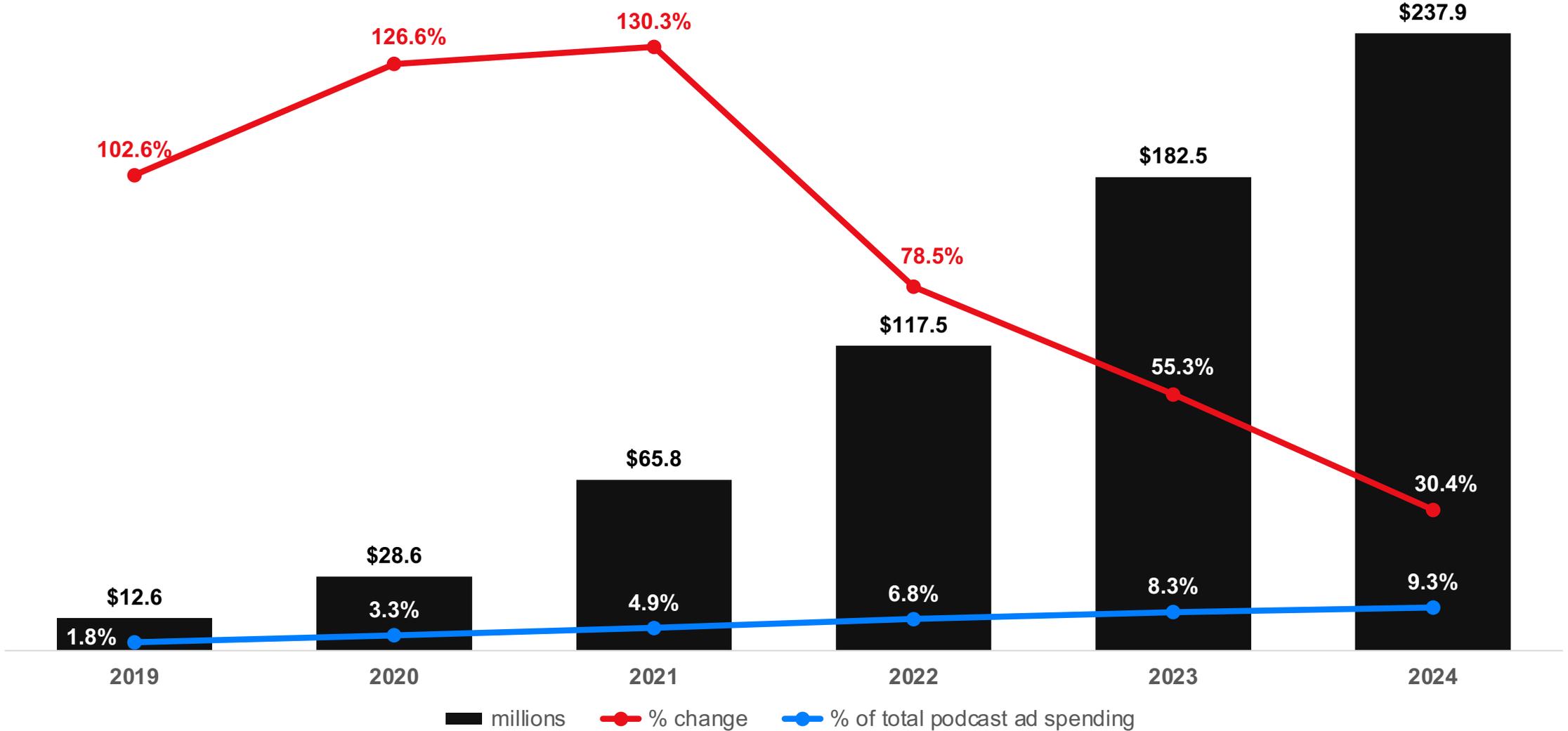
millions, % change, and % of total DOOH ad spending





Programmatic Podcast Ad Spending, 2019-2024

millions, % change, and % of total podcast ad spending





06

Major Trends & Questions

TOP TREND

Privacy and Identity Resolution



Google postponed its plans, but ...

The cookieless future is already here. Chrome is the last holdout among major browsers supporting third-party cookies. Firefox and Safari have blocked third-party cookies since 2019 and 2020, respectively.



How prepared is the industry?

Research suggests there's a growing sense of preparedness among data leaders at brands, agencies, publishers, and ad tech companies,¹ but a lot of confusion and uncertainty remains.



So, what's next?

Industry players will continue building new targeting and measurement infrastructures that don't require deterministic data.

CTA: don't wait to test and adopt!

MAJOR TRENDS AND QUESTIONS



Today

What capabilities exist today in the programmatic marketplace?



Targeting



Measurement



Quality Assurance



Emerging Channels



Tomorrow

How are capabilities evolving to keep up with privacy compliance?



Targeting



Measurement



Data Access & Governance



Together

What value is (or would be) added by this partnership?



Proof of Differentiators



Cost Transparency



Adaptability



Interoperability

Q+A

Basis[®]
Technologies

