
How to win in the digital reality of 2018?

Jean-Christophe Le Guellec, Business Development Manager
CEE



2011

Growth of the marketing
technology landscape
over 7 years

2012

2014

2015

2016

2017



~150

~350

~1,000

~2,000

~3,500

~5,000



Programmatic is the new „black”

Programmatic Ad Spending for Select Countries in Central and Eastern Europe, 2015-2019

millions and % of digital display ad spending

	2015	2016	2017	2018	2019
Turkey	\$7	\$21	\$189	\$294	\$342
—% of digital display ad spending	2.1%	5.5%	46.8%	66.7%	71.5%
Poland	\$12	\$66	\$94	\$132	\$182
—% of digital display ad spending	3.9%	19.8%	25.0%	31.4%	39.2%
Russia	\$35	\$81	\$77	\$142	\$221
—% of digital display ad spending	11.4%	23.0%	20.8%	33.2%	45.0%
Ukraine	\$3	\$8	\$17	\$32	\$62
—% of digital display ad spending	4.8%	9.7%	15.0%	25.0%	32.0%
Slovakia	\$3	\$7	\$11	\$16	\$22
—% of digital display ad spending	6.6%	11.8%	17.4%	21.2%	27.7%
Hungary	\$2	\$4	\$9	\$14	\$18
—% of digital display ad spending	3.6%	5.7%	12.4%	18.1%	21.3%
Estonia	\$4	\$5	\$6	\$7	\$8
—% of digital display ad spending	18.7%	26.0%	26.8%	26.8%	29.6%
Romania	\$0	\$1	\$4	\$5	\$8
—% of digital display ad spending	4.8%	11.5%	24.5%	30.5%	42.2%

Source: Zenith, "Programmatic Marketing Forecasts 2017," Nov 20, 2017

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www.eMarketer.com

20-30% of digital display ad spending is now represented by programmatic



Duopoly Shares More Data With Brands, But There Are Snags

by **Allison Schiff** // Tuesday, February 27th, 2018 – 6:00 am

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With additional reporting by Alison Weissbrot.

Sizable brands and top-tier publishers can use their clout to pressure media platforms into sharing more measurement data – but what are advertisers actually getting?

Just enough to keep them spending, said Chris Kane, founder of programmatic consultancy Jounce Media.



Special Access

DIGIDAY UK



A Walled Garden?

Walled Gardens are going to grow in volume and number - Good!

Published on March 5, 2018



Robert Webster ✓ Following
Chief Strategy Officer at Crimtan
3 articles



33



4



5



GOING GLOBAL

‘We’re at the foothills of what we can do’: How The Guardian improbably put itself on the path to profits

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ADWEEK

DIGITAL

Procter & Gamble Cut Up to \$140 Million in Digital Ad Spending Because of Brand Safety Concerns

BUSINESS INSIDER FRANCE

nce
VIR L'AVENIR

Entrepreneurs, faites-nous BANQUER.

Two of the world's biggest advertisers are cutting back on their digital ad spend

Tanya Dua · 26 Jun 2017, 13:51 · Advertising · 14,052



PLUS DE CHOIX,
PLUS DE CONFORT
POUR VOTRE PROCHAIN V

DÉCOUVRIR

DIGITAL

Procter & Gamble Cut Up to \$140 Million in Digital Ad Spending Because of Brand Safety Concerns

The CPG company also cut agency and production money

MW Marketing Week

LATEST

DISCIPLINES

CAREER DEVELOPMENT

STRATEGY

BRANDS

JOB

MINI MBA



Will other brands follow P&G's lead and cut digital ad spend?

P&G's decision to cut digital ad spend last quarter shows too many brands are still wasting money on ineffective digital ads.

By [Leonie Roderick](#) 4 Aug 2017 7:30 am

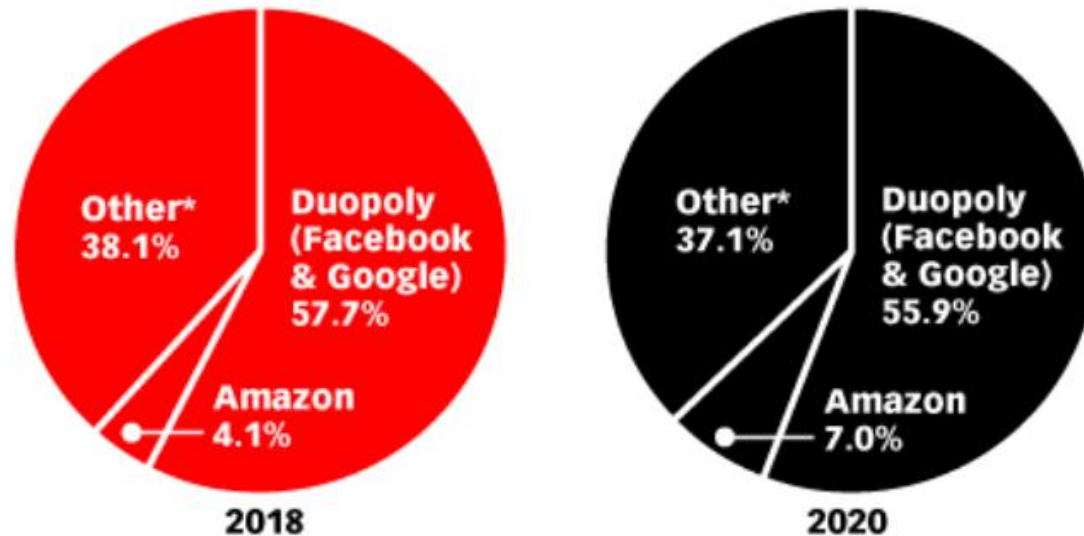
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Next paradigm: Triopoly

Duopoly vs. Amazon Share of Total US Digital Ad Spending, 2018 & 2020

% of total digital ad spending



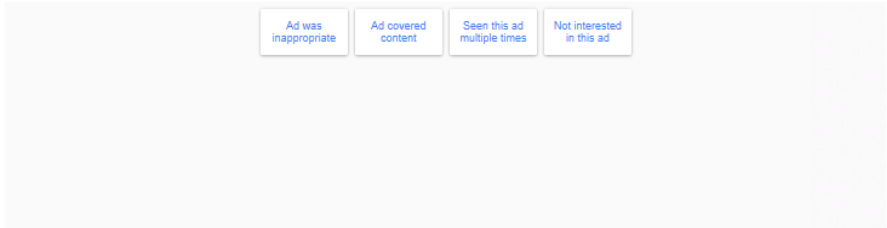
*Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices, and includes all the various formats of advertising on those platforms; net ad revenues after paying traffic acquisition costs (TAC) to partner sites; numbers may not add up to 100% due to rounding; *includes US digital ad spending outside Amazon, Facebook and Google*

Source: eMarketer, Sep 2018

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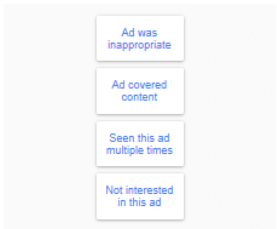


GOOGLE TECH

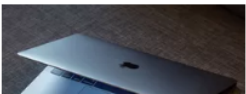
Google's Chrome ad blocking arrives today and this is how it works

By Tom Warren | @tomwarren | Feb 14, 2018, 7:00am EST

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Mar 3, 2017 · 4 min read

The Future Belongs to Premium Publishers That Control Ad Tech

It's time to regain some semblance of control...

Both premium publishers and advertisers are finally waking up from the dystopian nightmare created by third-party ad tech.

Allocation of Programmatic Ad Fees Worldwide, by Service Partner, 2017 billions and % of total

	Programmatic ad fees	% of total
Tech tax	\$34.9	55%
—Data targeting & verification	\$15.9	25%
—Trading desk	\$9.5	15%
—Demand-side platform (DSP)	\$6.3	10%
—Exchange	\$3.2	5%
Publisher revenues (assumes zero fraud)	\$25.4	40%
Agency of record	\$3.2	5%
Total programmatic ad spending	\$63.4	100%

Note: read as 55% of the amount spent on programmatic ads went to a "tech tax," while 5% went to the agency of record and 40% went to the publisher (with a 0% fraud assumption); excludes search and social; numbers may not add up to total due to rounding
Source: Warc, "Global Ad Trends March 2018" based on Magna Global figures, March 29, 2018

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Challenges

UNDERSTAND
**AUDIENCE &
USER
LIFETIME
VALUE**



KEEP DATA
**SAFE &
ACTIONABLE**



CREATE THE
PERFECT
**USER
EXPERIENCE**



BUILD THEIR
**OWN UNIQUE
MARKETPLACE**



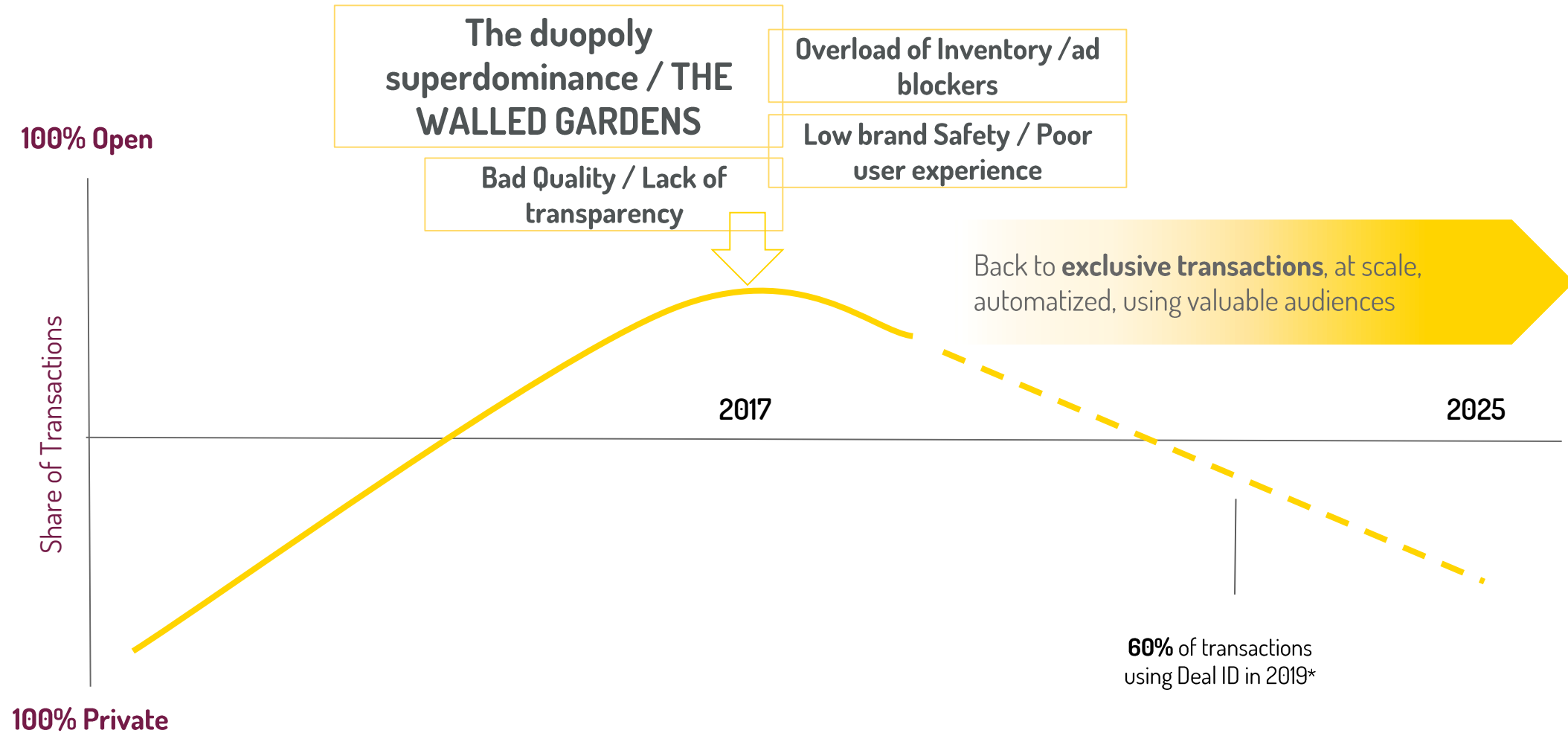
OPTIMIZE
REVENUE





Where do we stand

THE CURRENT DIGITAL ADVERTISING MODEL **HAS REACHED ITS LIMITS**





The private garden



Conclusion?

PUBLISHERS

Support & technologies

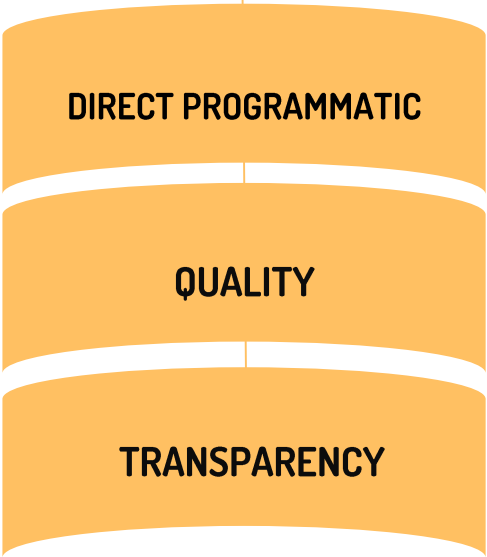


Build their
PRIVATE GARDEN



BUYERS

Support & access to
media opportunities





How Private Garden meets demand needs

*From **massive** to **exclusive** sales*

ENSURING A **FULLY
CONTROLLED &
QUALITY**
ENVIRONMENT



PROVIDING **BETTER
TARGETING**
OPTIONS



REINFORCING
**PUBLISHERS &
BUYERS'
COMMITMENT**



SUPPORTING
**PROGRAMMATIC
DIRECT**



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