

The Netherlands, Ready For 100% Programmatic

The background image is a high-angle, wide shot of an automotive manufacturing plant. In the foreground, a white car chassis is positioned on a conveyor belt. To the left, a large orange robotic arm is visible, and to the right, another one is working on a different part of the assembly line. In the background, several completed cars are visible, and a large number of sparks are being generated from a welding process, creating a bright, starburst effect. The entire image has a warm, orange-toned overlay.

Development of Programmatic in NL

Crucial developments in mentality

“Programmatic
cannibalizes IO
adspend”

“RTB is for
remnant
inventory”

“RTB kills
jobs”

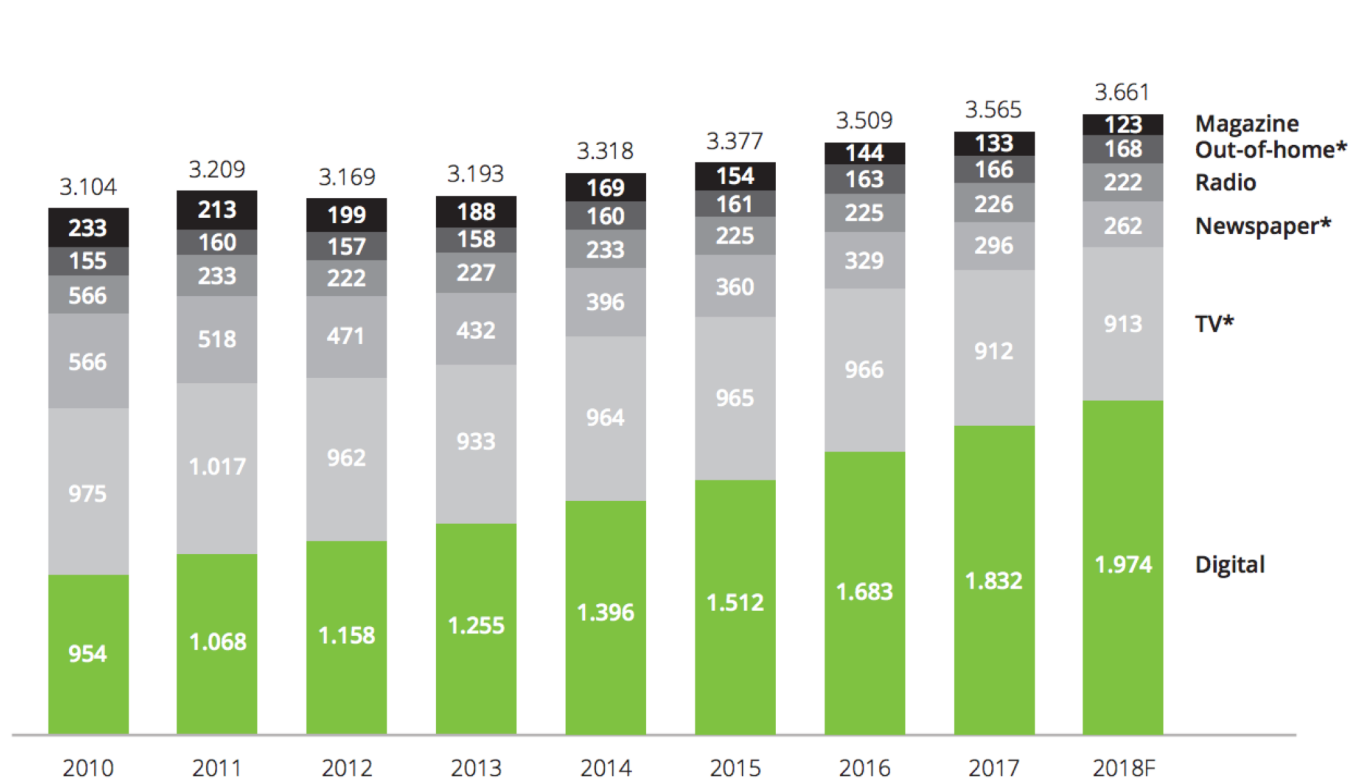
“RTB will kill
the
conversation
between
supply and
demand”

“RTB is not
transparent”

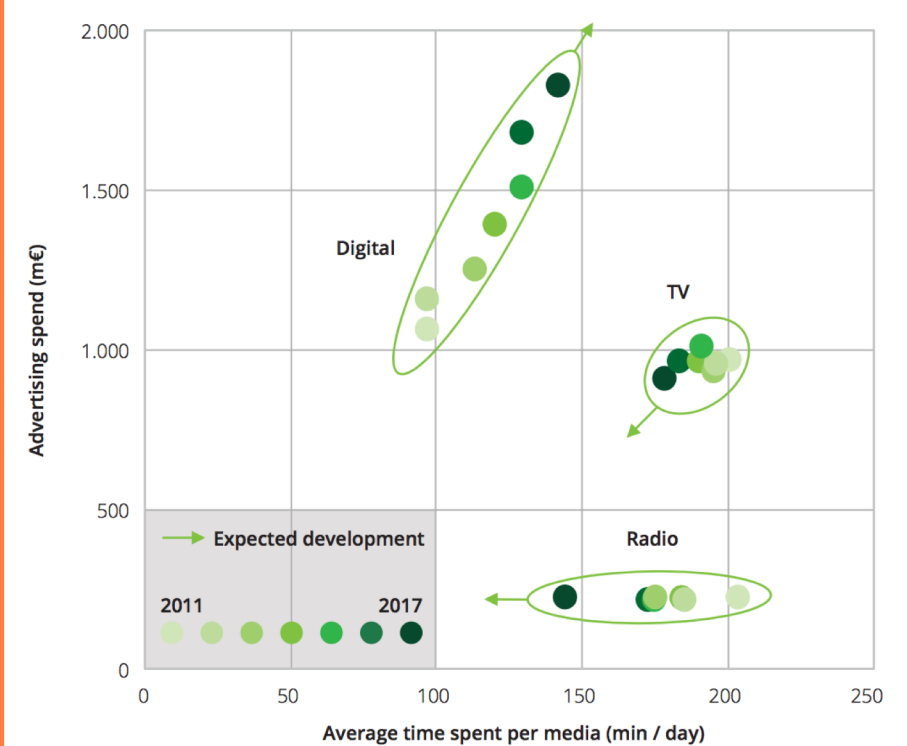
Our industry matured and standardized

The past eight years

Net advertising market (m€)



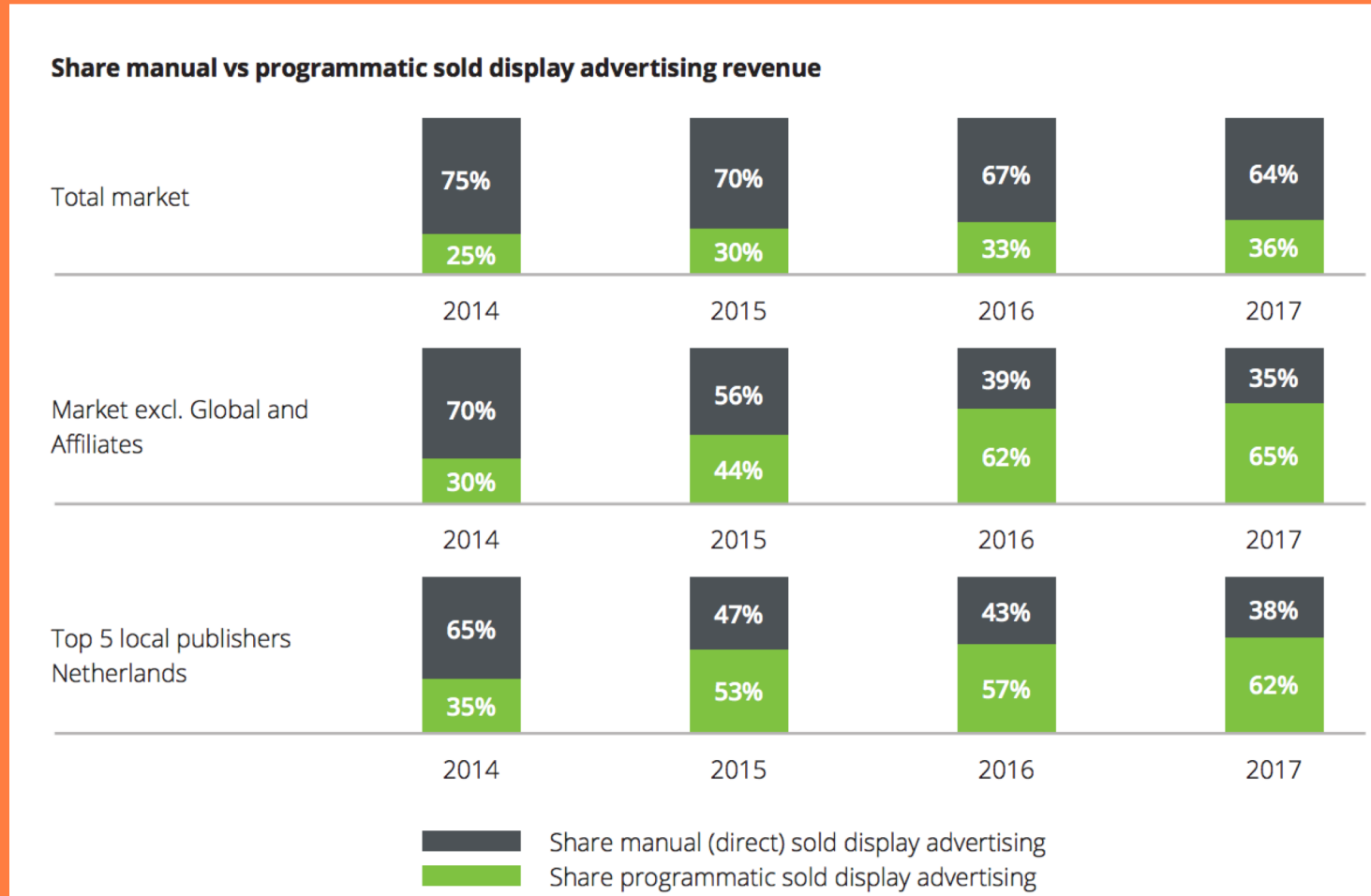
Time spent vs. ad spend per medium



Source: VINEX, SKO, NLO, SPOT, Deloitte analysis

Source: IAB Adspend Study 2017

Manual vs. Programmatic



Source: IAB Adspend Study 2017

Offline to Online

OPPORTUNITIES

↑
DOOH
116% YoY

↑
Digital Audio
20% YoY

↑
Digital Video
Advertising
40% YoY

CHALLENGES

KPI
Measurement

Infrastructure

Benefits of Programmatic

**Consolidated
execution,
reporting &
insights**

**Realtime
budget
allocation**

**Unified
Audience
Verification**

**Unified
adserving**

**Unified 3rd
party
targeting**