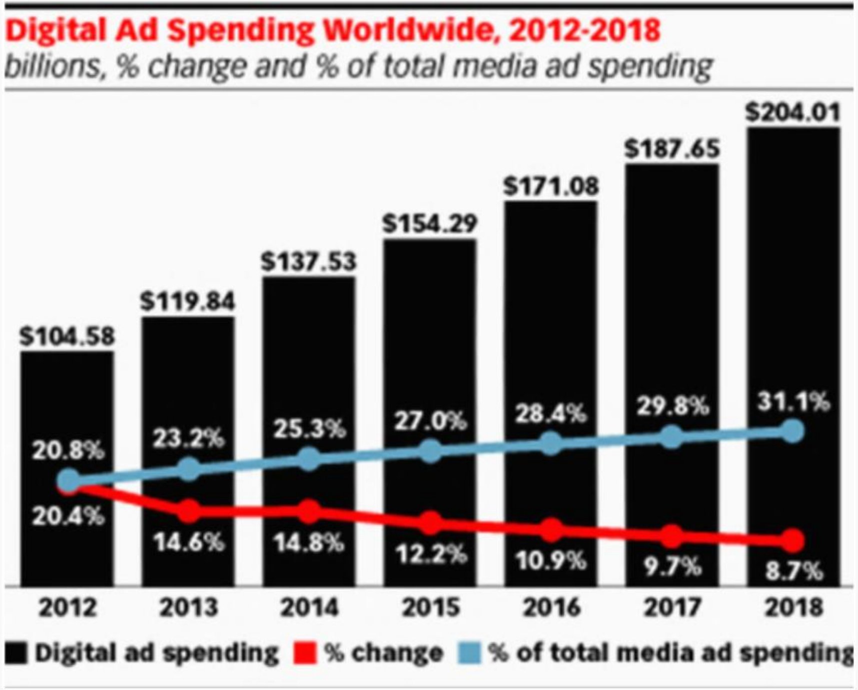
Content

- Overview World Wide and Europe
- Trends for 2014
- Summary

Development digital Ad Spend World Wide – 138 billion USD



- Total digital ad spend to hit 140 billion USD in 2014
- Total digital ad spend is app 25% of total ad spend
- 2014 growth rate is 15%
- Double digit growth for digital untill 2017

Development digital Ad Spend WE and EE

Digital Ad Spending Worldwide, by Region, 2011-2017
billions

	2011	2012	2013	2014	2015	2016	2017
North America	$34.58	$39.70	$45.44	$51.05	$56.24	$61.31	$65.59
Asia-Pacific	$22.40	$30.58	$33.76	$37.77	$41.78	$45.83	$50.18
Western Europe	$23.51	$25.76	$28.39	$31.37	$33.79	$36.09	$38.25
Central & Eastern Europe	$2.87	$3.70	$4.55	$5.28	$5.97	$6.50	$7.03
Latin America	$2.48	$3.39	$4.11	$5.29	$6.18	$7.23	$8.27
Middle East & Africa	$0.59	$0.91	$1.35	$1.86	$2.42	$3.06	$3.80
Worldwide	**$86.43**	**$104.04**	**$117.60**	**$132.62**	**$146.38**	**$160.02**	**$173.12**

Note: includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; excludes SMS, MMS and P2P messaging-based advertising; numbers may not add up to total due to rounding
Source: eMarketer, Aug 2013

162195 www.eMarketer.com

- WE and EE spend 40 billion USD
- WE digtial growth rate 10%
- EE digital growth rate 16%
- Share digital in UK as percentage of total spend already climbing to 47,5 % in 2014 compared to 27,9% in the US

2014 Display Advertising Eco System

quisma

Programmatic and RTB growth

- World wide programmatic spending growing by 38% to 16,6 billion USD
- Strong growth RTB - CAGR WE 54%
- Forecasted growth for CEE region is 91%

US and Worldwide* Programmatic Display Ad Spending, 2011-2017
billions, % change and % of total

	2011	2012	2013	2014	2015	2016	2017
US	$2.8	$4.8	$7.5	$9.8	$12.4	$14.8	$16.9
% change	-	71.4%	56.3%	30.7%	26.5%	19.4%	14.2%
% of total	62.2%	63.2%	62.5%	59.0%	56.6%	54.2%	51.8%
Worldwide	$4.5	$7.6	$12.0	$16.6	$21.9	$27.3	$32.6
% change	-	68.9%	57.9%	38.3%	31.9%	24.7%	19.4%

*Note: includes both RTB and other programmatic/automated platforms for banner, social and video ads on desktop and mobile devices; *includes Australia, China, France, Germany, Japan, Netherlands, Spain, UK and the US*
Source: MAGNA GLOBAL as cited in press release; eMarketer calculations, Oct 14, 2013

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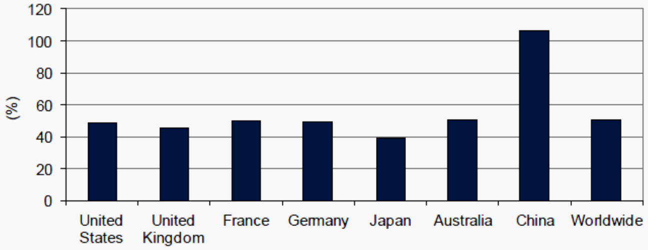
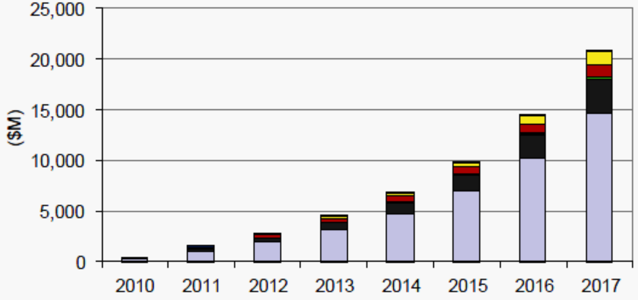
Worldwide Real-Time Bidding Compound Annual Growth Rates by Region, 2012–2017

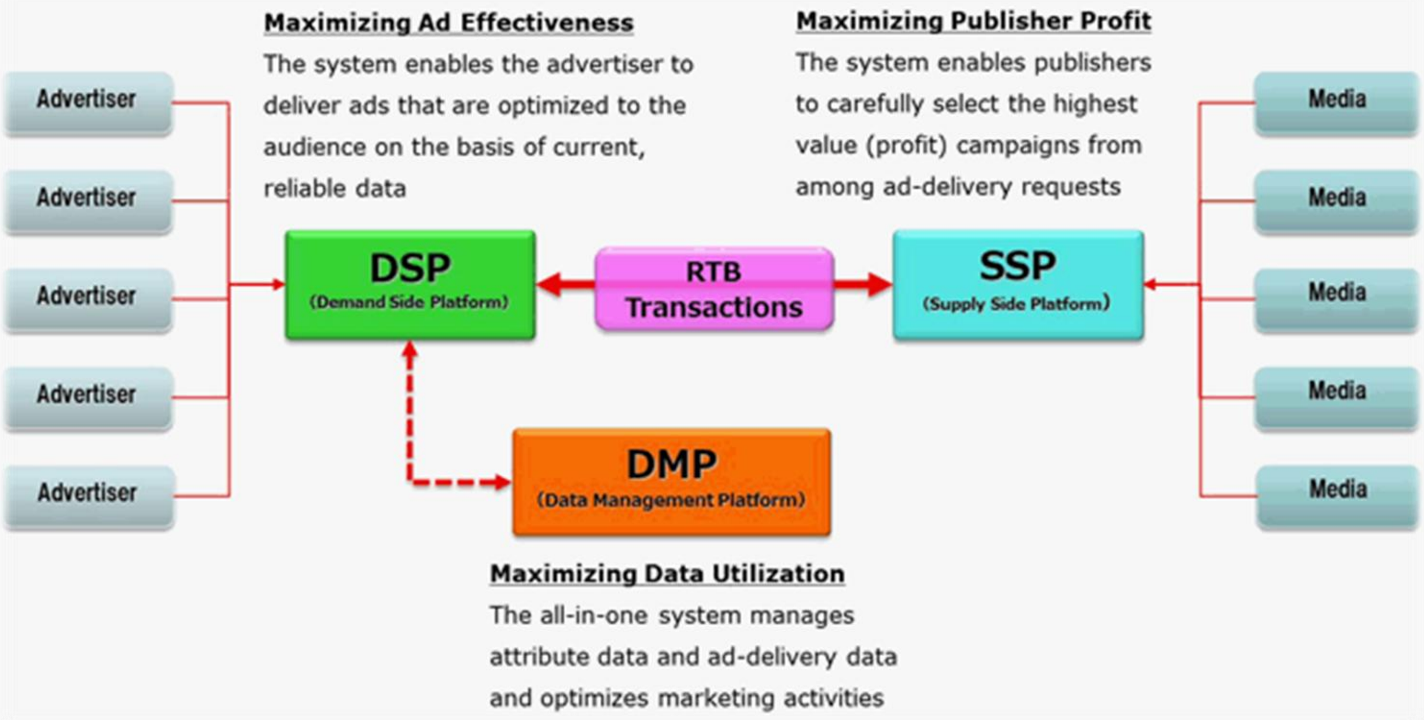


Source: IDC, 2013

Worldwide Total RTB-Based Display Ad Spending by Region, 2010–2017



Automated Trading (DSP, DMP & SSP)



Launch of preferred deals

More Control **More Flexibility**

Preferred Deals

Traditional fixed CPM direct deal transacted in real-time

Bring programmatic operational efficiencies to direct deals

Private Auction

Direct deal and auction hybrid

Bring scale, optimization and targeting to your direct deals

Open Auction

Traditional RTB exchange buying

Massive supply from millions of publishers

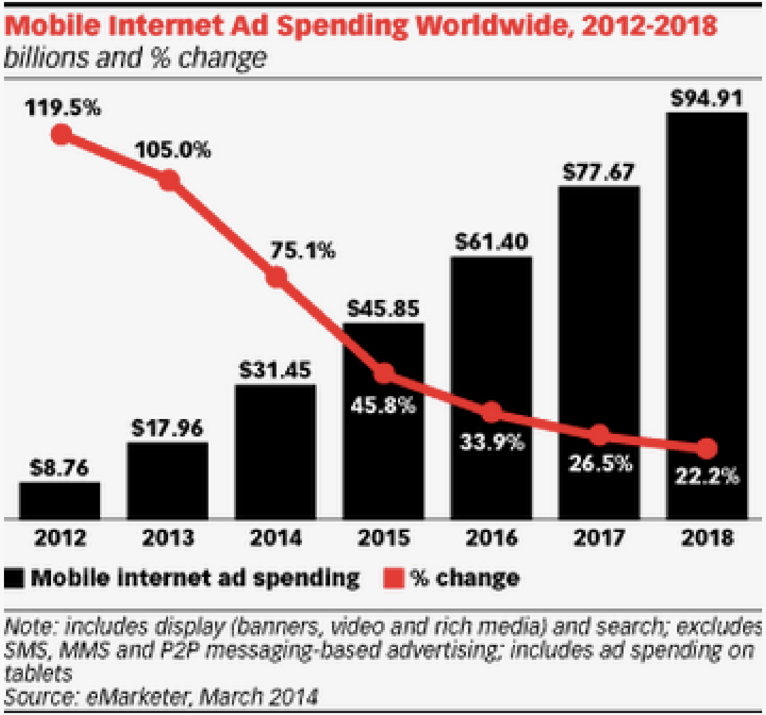
The future: Programmatic everywhere?

What will programmatic bring in the “near” future?

- Programmatic tapping into selling premium inventory
- Data and targeting options are adding value for buyers
- Programmatic makes it possible to effectively engage with target audiences accross various digital properties
- Programmatic is moving from online into mobile, tv, OOH…

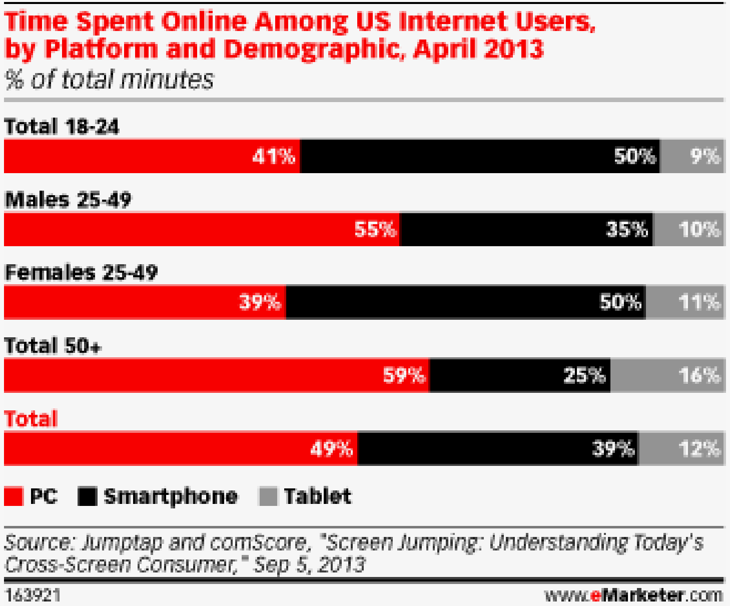
Mobile

Mobile Ad spending in 2014



- Worldwide mobile ad spend increased by 105% in 2013 to app 18 billion USD
- Mobile ad spend to grow to 31 billion in 2014
- Mobile ad spending continues to accelerate; growth rate exceeds 75%
- Mobile will count for nearly 25 % of total digital ad spend

Today we are living in a multi screen environment



…and mobile is becoming the center of this multi platform landscape

Growing number of consumers always on

Smart phone penetration exceeds 50%

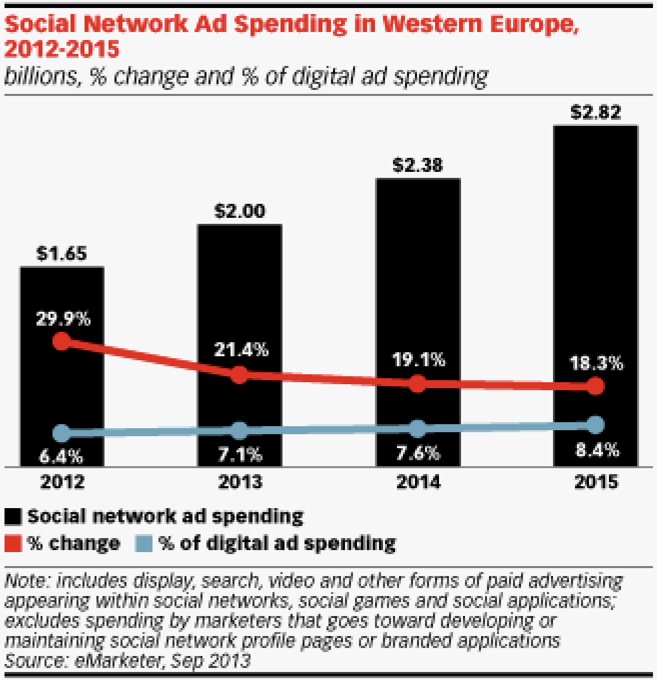
Opening up full potential of M-commerce

Other factors supporting growth of mobile ad spend

- More traffic available via RTB / Programmatic (shift from direct to indirect)
- Growing demand: Attractive CPM rates, average CTR's twice as high
- 4G connection is solving latency issue
- Increase of Mobile optimized websites
- User / location based ads
- iBeacon technology - in shop ads (merge of offline shopping and mobile advertising)

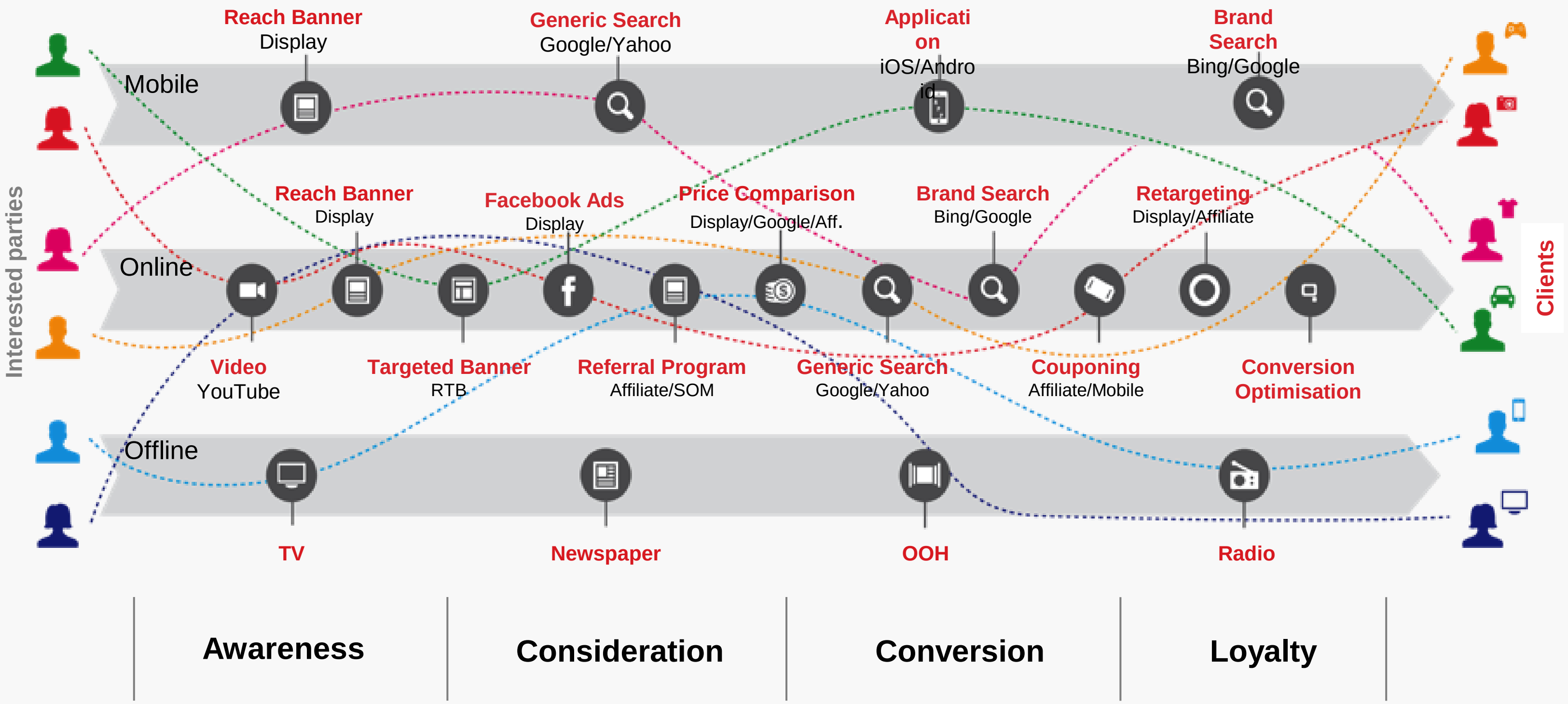
Social

Social



- Social spending in WE will grow at around 22% in 2014
- Social = mobile (2/3 of revenues are driven by mobile)
- FB: > 500 million MAU
- Social spend mainly driven by FB
- (Re)-targetting
- Video advertising / auto play
- Growing number of social networks like Twitter, LinkedIn, Instagram, Snapchat .....

Customer Journey



Marketing is no longer about single channels and tools

Mutli channel path to purchase

TV spot

Display ad

Generic ad SEA

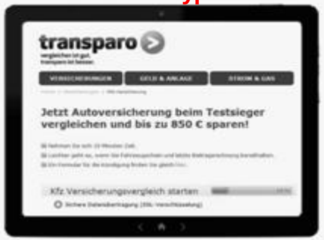
Sunday – 7pm - TV living room

Monday - 12pm- Computer office

Sunday – 7pm –Tablet living room

Monday – 8pm - Laptop at home

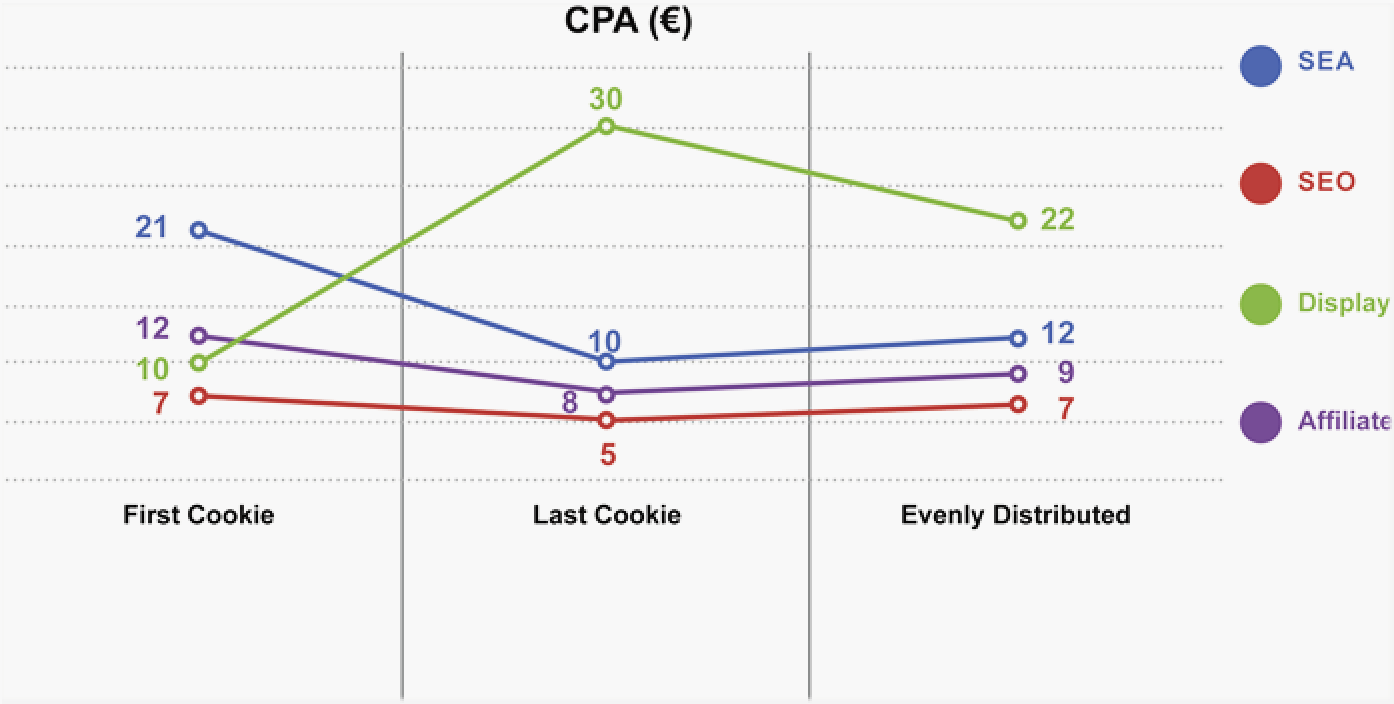
Direct type-in



Brand ad SEO

Conversion

Which attribution model is the right one?



Using individual modelling to define how much each touch point exactly contributed to the conversion - optimize budget allocation

Other digital trends

- Content advertising / Native advertising
- Video advertising (driven by mobile and social - sharing)
- Retargetting and DCO
- Localised advertising and Geo-targetting

Summary

- Programmatic / RTB will move from online into Mobile, TV,…;
- Further automation of display ad value chain will increase ROI for advertisers AND publishers;
- Mobile is becoming the center of the multi platform landscape, key driver ofdigital advertising in the coming years;
- Social = Mobile;
- Growth of multi channel strategies will grow the need for Customer Journey and Attribution moddeling techniques to optimize allocation of online marketing budgets;

Thank you!

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