

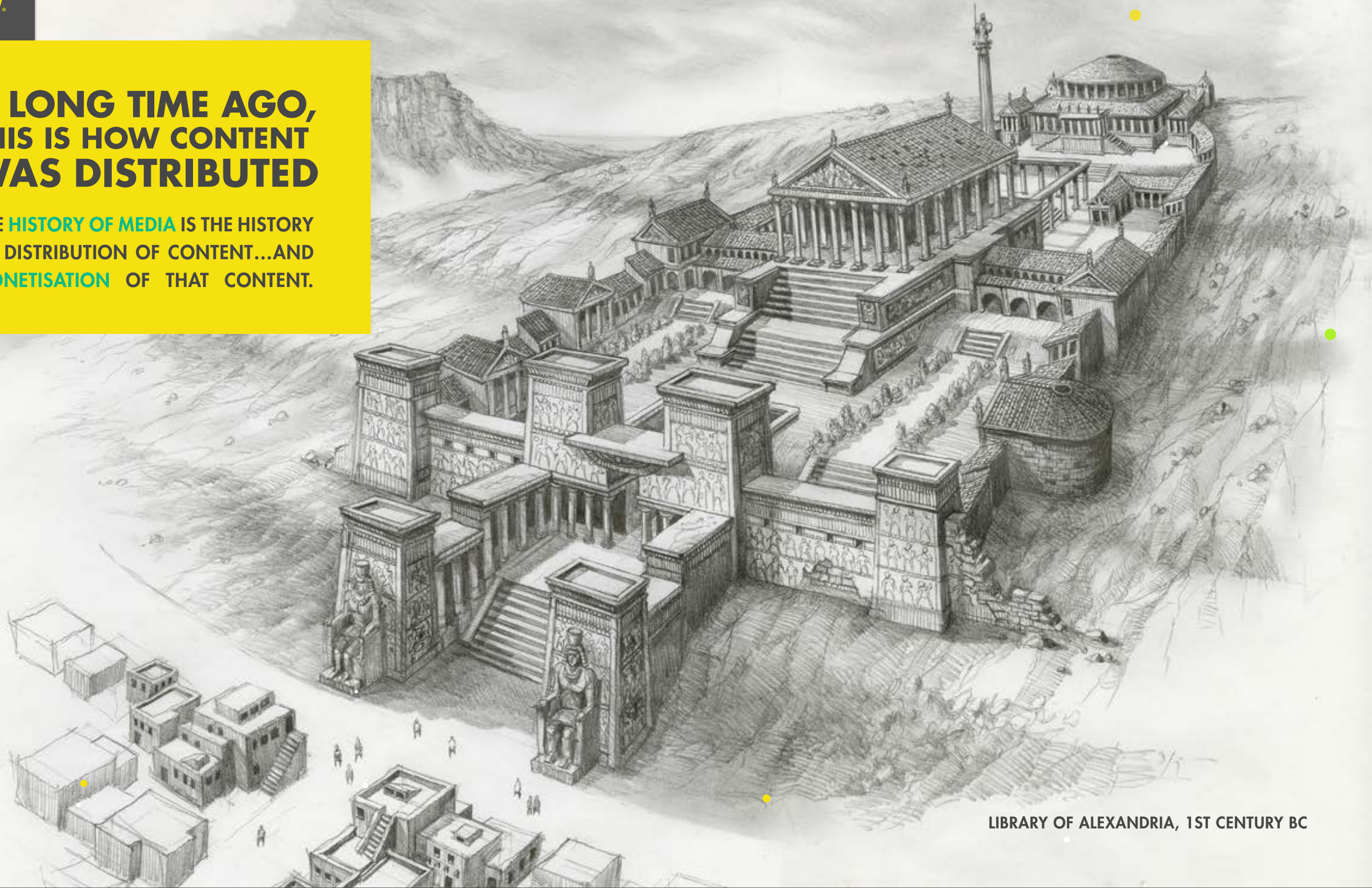
HELLO, WE'RE  
captify®

# HOW PROGRAMMATIC BUYING WILL TRANSFORM THE GLOBAL MEDIA LANDSCAPE

PRAGUE, 9TH APRIL 2015  
INTERNET ADVERTISING CONFERENCE 2015

# A LONG TIME AGO, THIS IS HOW CONTENT WAS DISTRIBUTED

THE HISTORY OF MEDIA IS THE HISTORY  
OF DISTRIBUTION OF CONTENT...AND  
MONETISATION OF THAT CONTENT.



LIBRARY OF ALEXANDRIA, 1ST CENTURY BC

# A SHORT HISTORY OF EVERYTHING ..IN MEDIA



Print - **1780's**



Mass Print - **1850'S**



Radio - **1930'S**

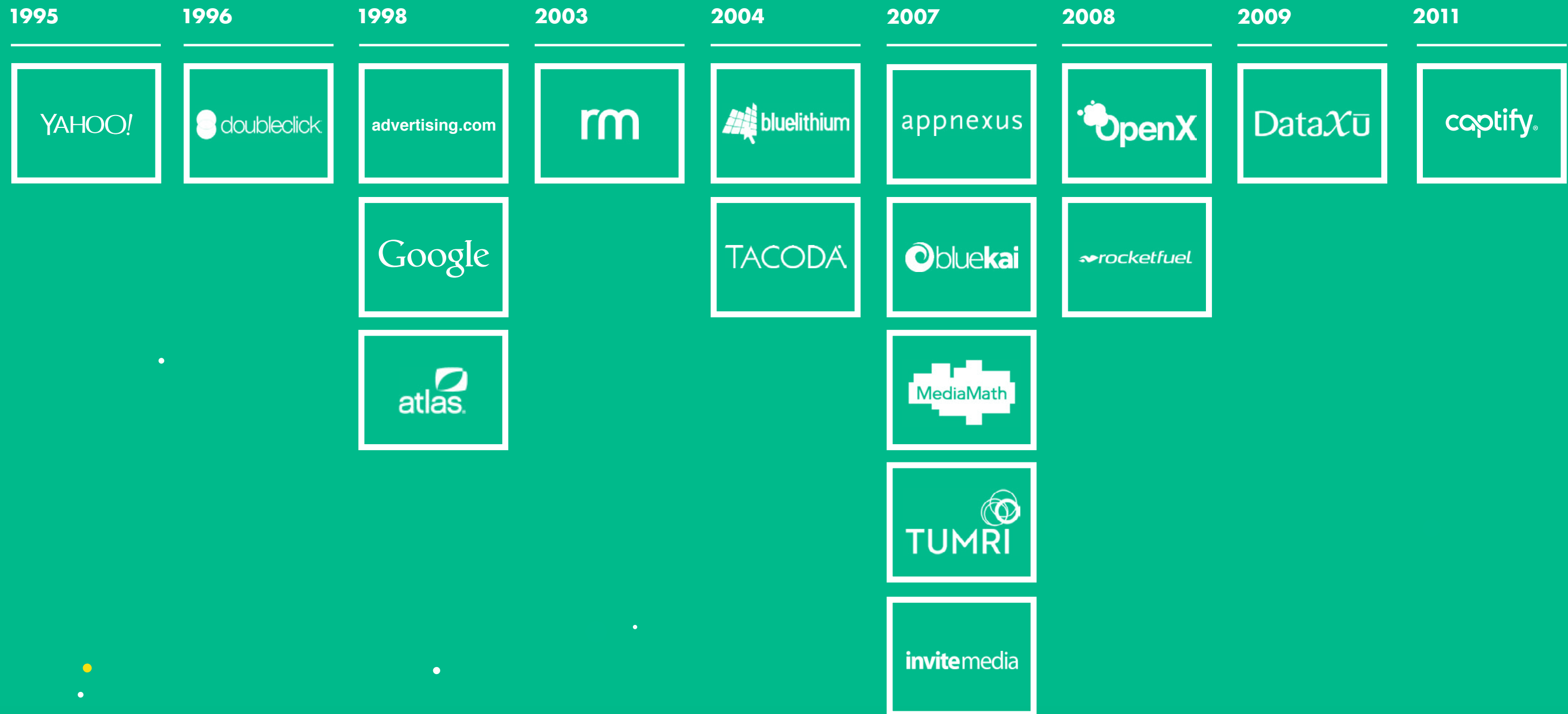


Television - **1950's**



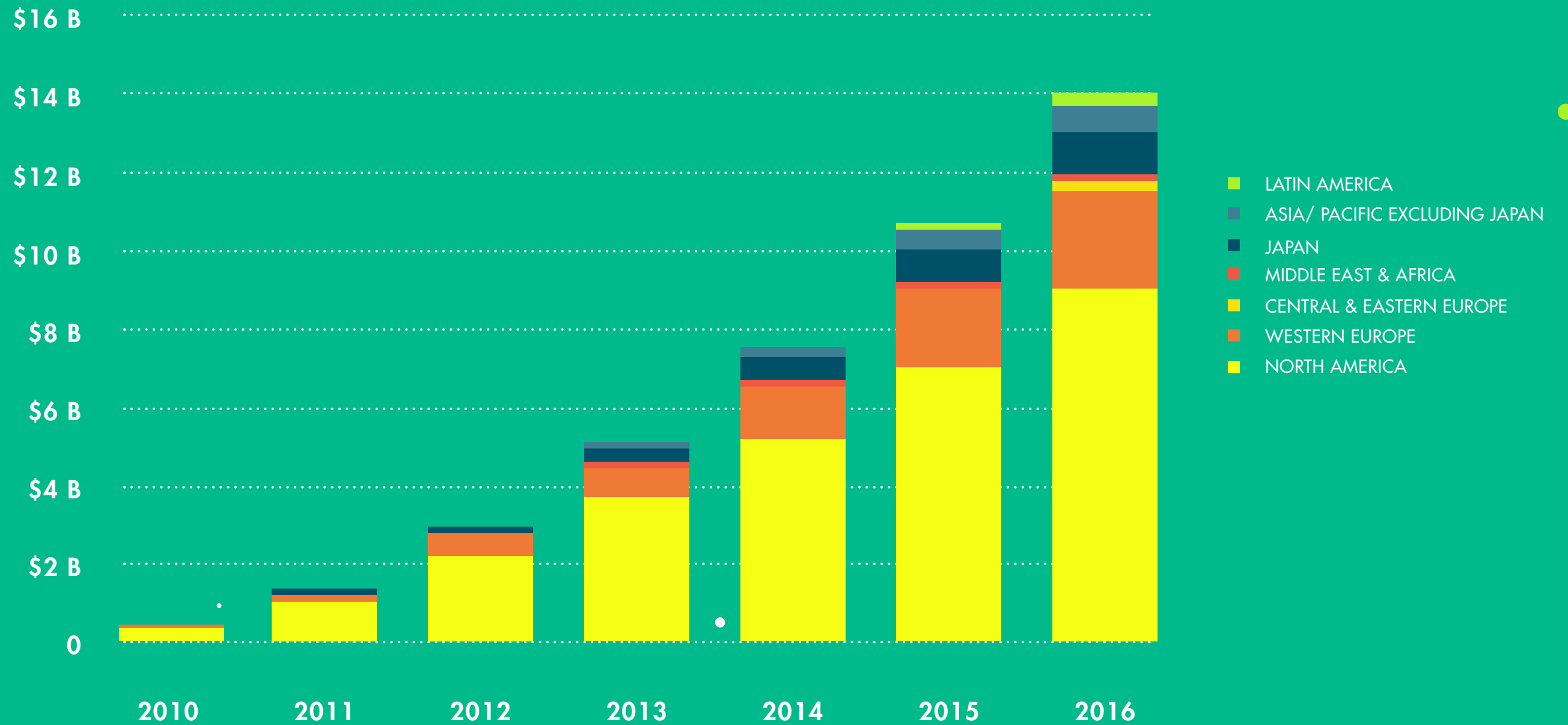
The Internet - **1990'S**

# THERE IS MORE MEDIA HISTORY IN THE INTERNET THAN IN TOTAL MEDIA HISTORY...

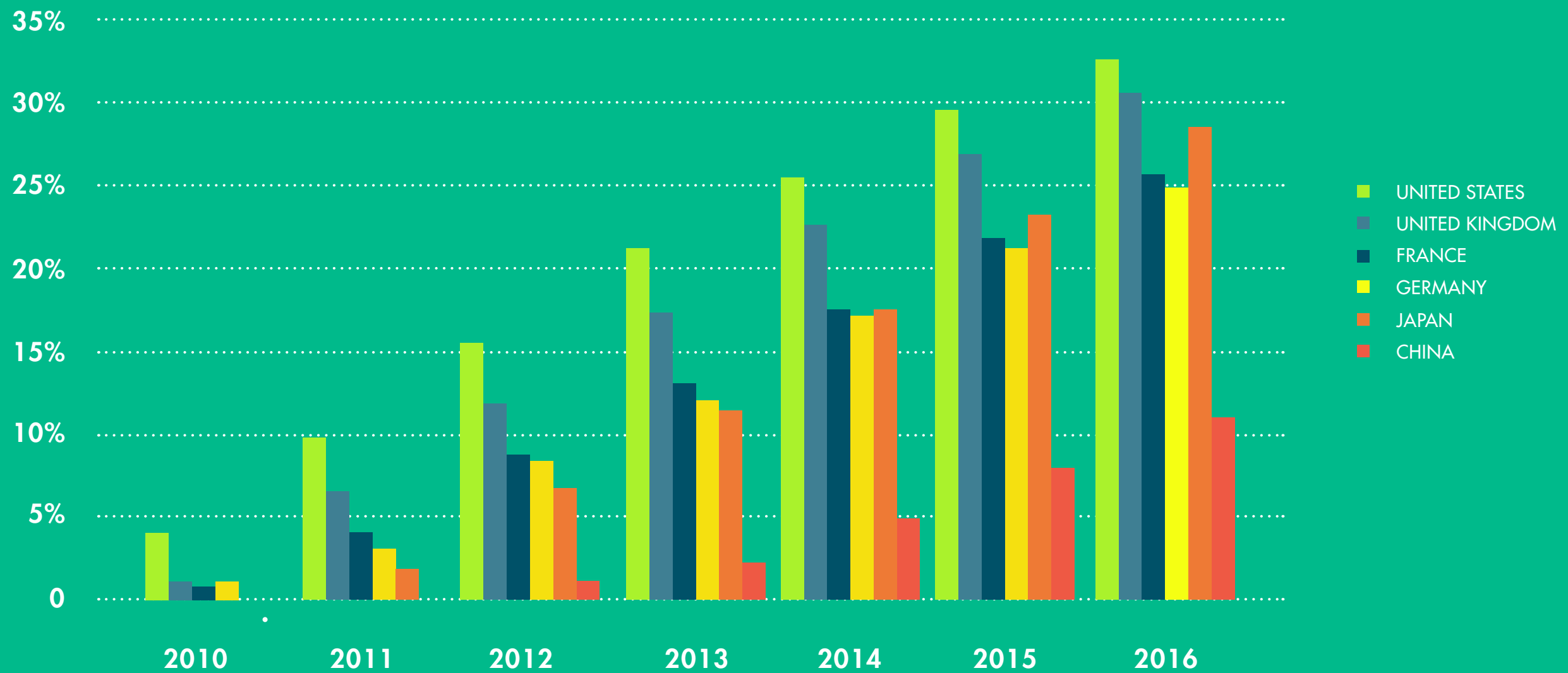


# RTB GLOBAL GROWTH IS SPECTACULAR

TOTAL RTB-BASED DISPLAY AD SPENDING BY REGION, 2010 - 2016



# STILL, GLOBAL RTB SPEND IS CONCENTRATED IN 6 MARKETS



# POWERED BY RTB, DISPLAY HAS OVERTAKEN SEARCH



DISPLAY



CLASSIFIED



SEARCH

\$42.4<sup>BN</sup>

\$12.8<sup>BN</sup>

\$49.0<sup>BN</sup>

\$51.8<sup>BN</sup>

\$13.5<sup>BN</sup>

\$55.7<sup>BN</sup>

\$63.2<sup>BN</sup>

\$14.2<sup>BN</sup>

\$63.1<sup>BN</sup>

\$74.4<sup>BN</sup>

\$15.1<sup>BN</sup>

\$71.1<sup>BN</sup>

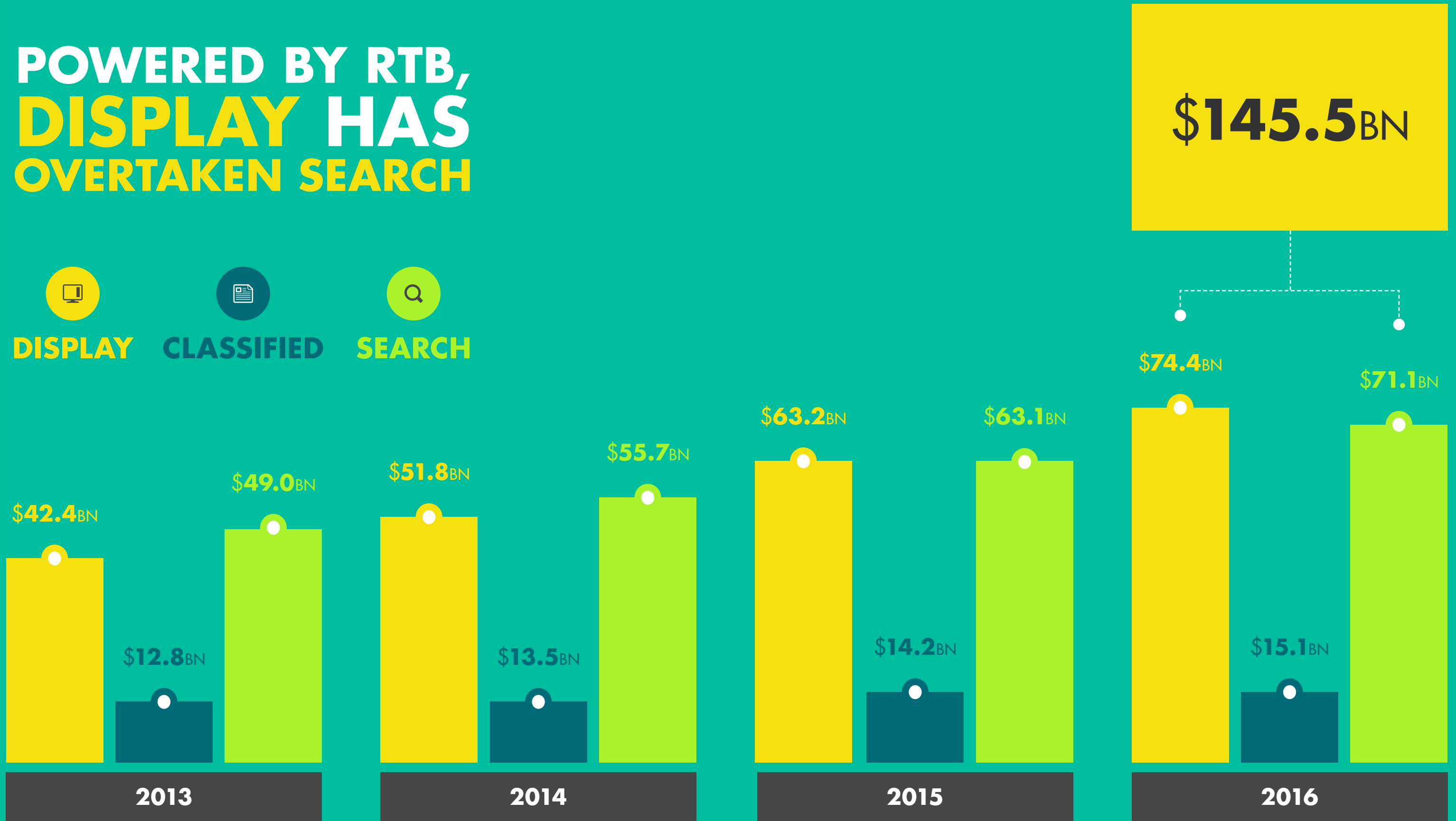
2013

2014

2015

2016

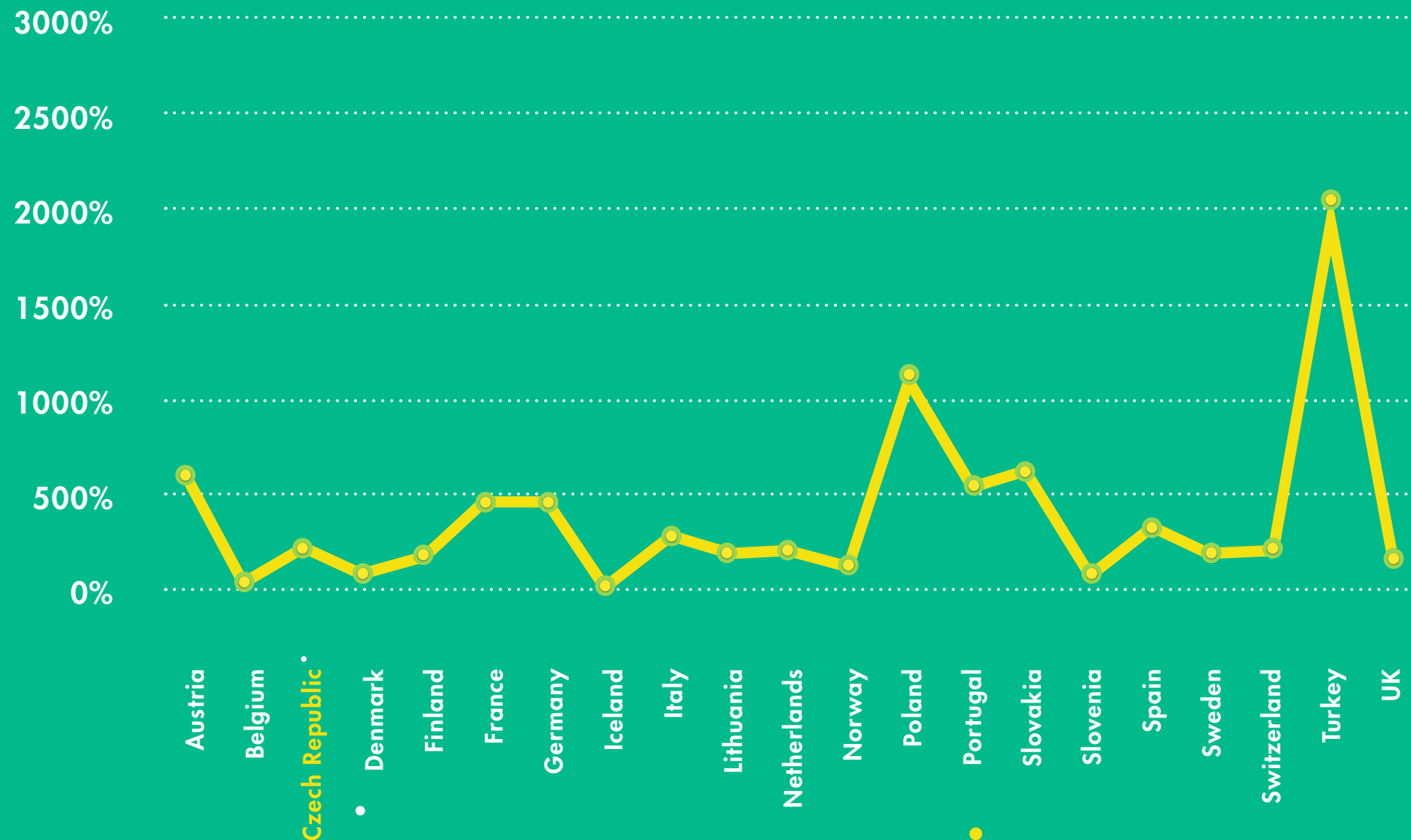
\$145.5<sup>BN</sup>





# RTB IS NOT AN ISOLATED PHENOMENON: IT WILL TAKE OVER THE MEDIA WORLD

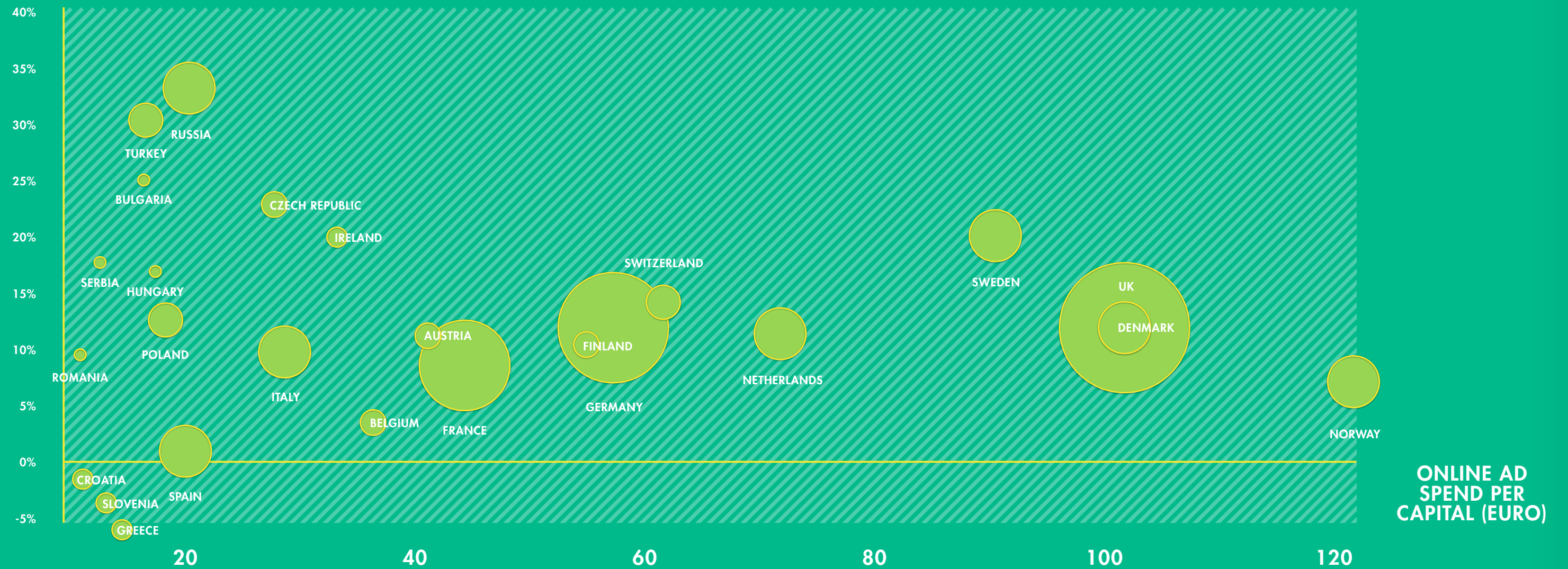
**GROWTH BY COUNTRY** NORDICS SAW A 164% LIFT; POLAND 1500%; GERMANY GREW BY 600%;  
THE U.K.'S MATURE MARKET GREW BY 196% AND TURKEY SAW HYPER GROWTH



# THE NUMBER ONE DRIVER OF AD MARKET GROWTH WILL BE RTB...

ONLINE AD GROWTH PER MARKET

COUNTRY BUBBLES REPRESENT MARKET SIZE

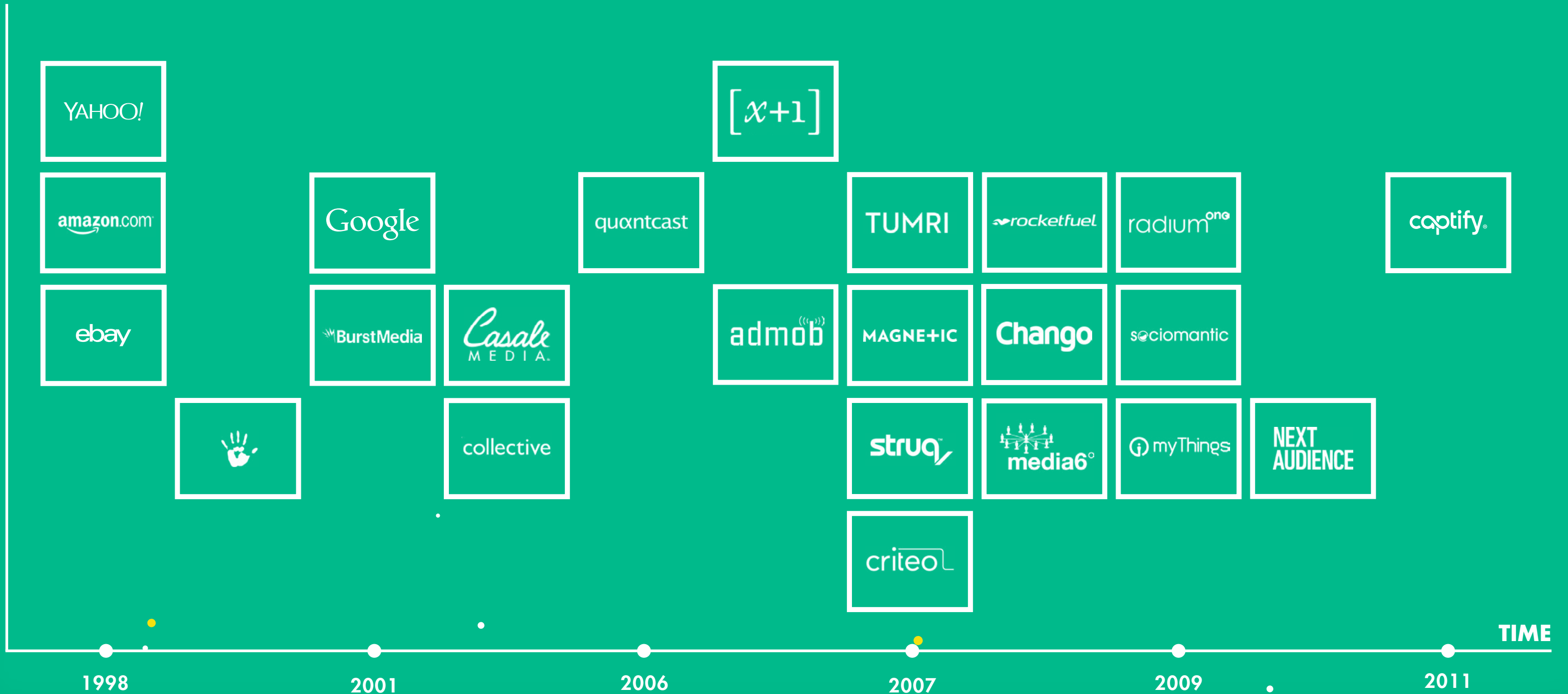


# SO, WHAT HAPPENED?



# CREATING A MARKET WITH NUMEROUS PLAYERS

TOP FUNNEL



# SAME ECOSYSTEM, DIFFERENT MODELS

## TRANSATLANTIC MODEL

- MANAGED SERVICE
- OPEN EXCHANGE
- DATA
- COMPETITION
- TALENT
- INNOVATION

## NORTHERN MODEL

- SMALL MARKETS
- TECHNOLOGICALLY SAVVY
- PROGRAMMATIC ADOPTION
- ITDs DOMINATE
- DATA BEHIND
- TALENT

## CONTINENTAL MODEL

- COALITIONS OF PUBLISHERS
- PMPs, PRIVATE DEALS
- ATDs
- DATA MARKET GROWING
- SPLIT BETWEEN BRAND AND PERFORMANCE

# WHAT ARE THE KEY DRIVERS AND INHIBITORS?

## INHIBITORS

- Education
- Digital spend
- Digital as performance
- Availability of talent
- Inventory
- Agencies
- Publishers
- Data

## DRIVERS

- Demand
- Innovation
- Costs
- Efficiency
- Premium inventory
- Data
- Talent

## FUTURE INHIBITORS

- Fraud
- Brand safety
- Viewability
- Transparency
- PMPs
- Last click attribution
- Data

## FUTURE DRIVERS

- Brand budgets
- Costs transparency
- Disintermediation
- Intelligence & analytics
- Innovation

# WHAT'S NEXT?

# IT'S A MARKET CHARACTERISED BY

**UNLIMITED SUPPLY  
OF INVENTORY**

**AUCTION**

**FAST GROWING  
DEMAND**

**SECOND PRICE  
AUCTION**

**SEAMLESS  
PROCESS WITH  
DISINTERMEDIATION**

**CONSTANT ARBITRAGE  
AND COLLECTION OF  
MARKETPLACES ALL  
INTERCONNECTED BY  
COMMODITISED  
TECHNOLOGY**

**GROWING NEED  
FOR AD OPS AND  
DATA ANALYSTS**

**BREAKNECK SPEED  
INNOVATION SHIFTING  
POWER CONSTANTLY  
WITHIN THE COMPLEX  
EVER CHANGING  
ECOSYSTEM**



# WITH PLENTY OF INNOVATION



# AN EXAMPLE: **SEARCH RETARGETING**



# PIONEERING SEMANTIC TECHNOLOGY

## PROPRIETARY SEMANTIC TOOLS

**KEYWORD PERMUTATIONS GENERATOR**

**MULTI CATEGORY INDEX & DICTIONARY**

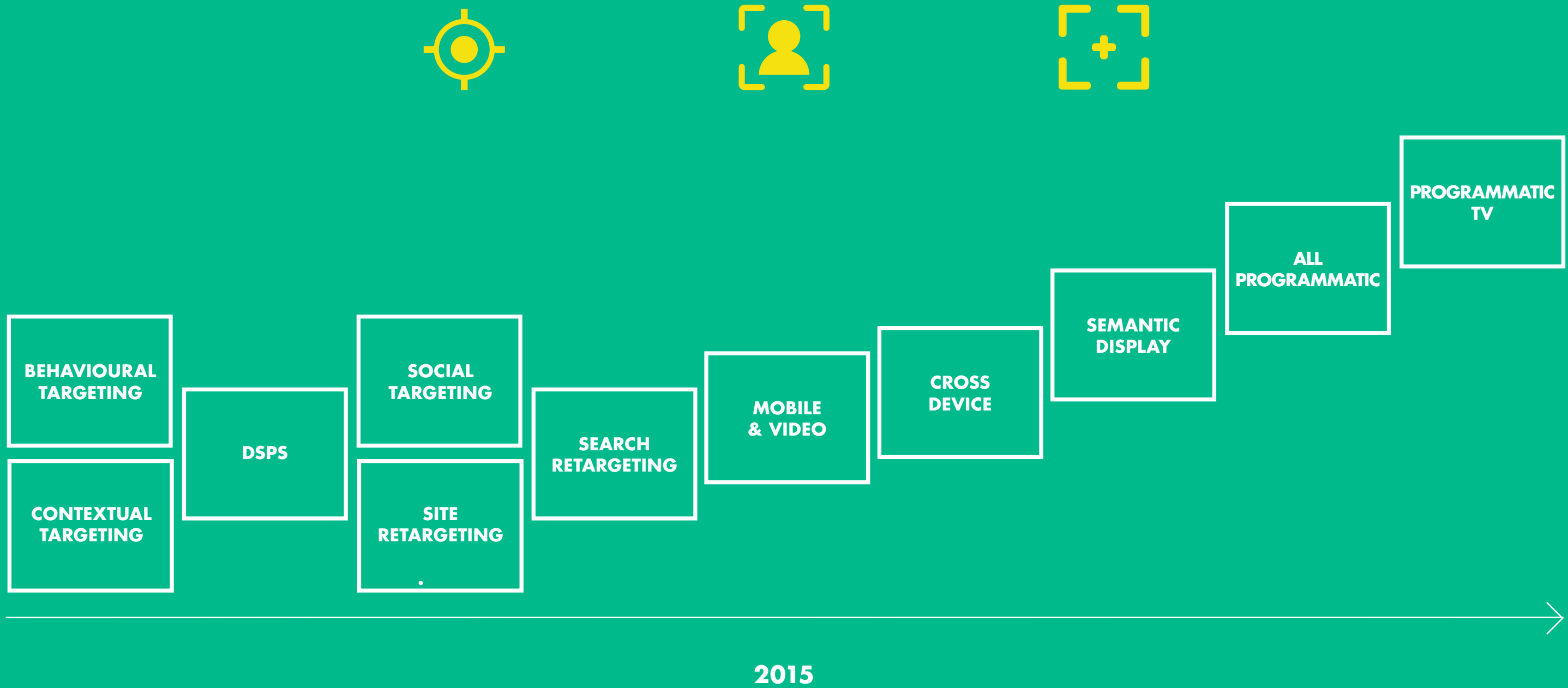
**THESAURUS**

**KEYWORD MANAGER**  
ROOTING & GROUPING

## EXPANSIVE KEYWORD TARGETING CONSIDERING:



# THE NEW FRONTIER..



**THANK YOU**  
ANY QUESTIONS?

captify®