



Future Trends of the Ad-Tech Market

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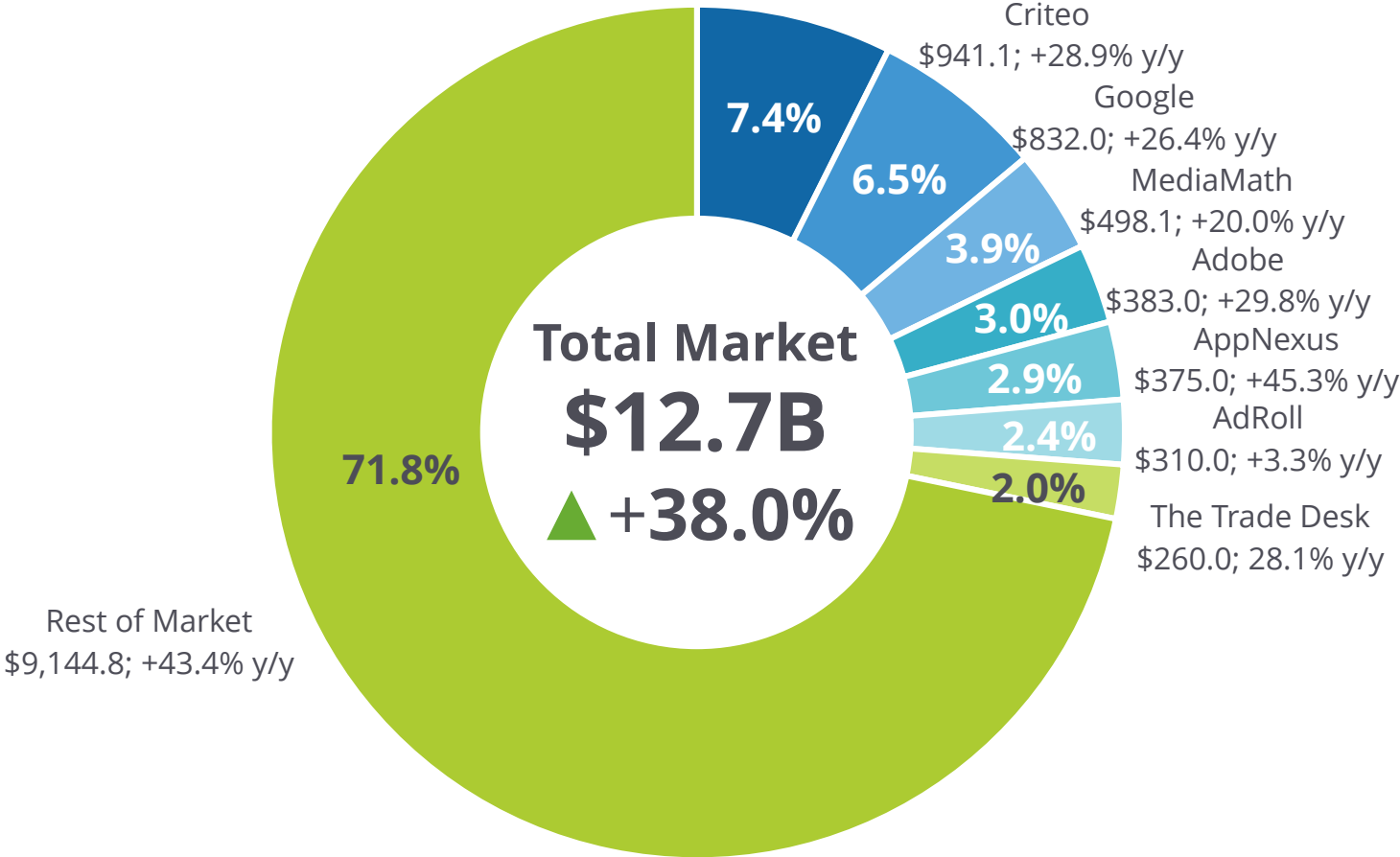
Industry And Market Overview

- Buyers continue to feed digital growth fed from traditional budgets (15% CAGR)
- 40% of overall growth coming from former TV budgets
- Rapid growth of video, 24% 2017- 2022 CAGR overall; 35% for mobile video. Mobile > Connected TV > Addressable TV > Programmatic TV > traditional TV
- Shift desktop -> mobile continues, but slows as mobile saturation reached; in-app >> browser
- Social continues to grow share and remains no.1 channel in display and video
- Programmatic continues to grow
- Data & privacy: Tech companies are facing a “privacy paradox”. They’re caught between using data to provide better consumer experiences and violating consumer privacy

Competitive Landscape: Vendors

- Advertising software segment is still very fragmented. Even top 15 vendors represent not even 40% of the market
- The two top vendor categories are demand-side platforms (DSPs) or DSP-like offers and one-stop shops, followed by supply-side platforms (SSPs) with revenue volumes about half the size of that of the DSPs.
- Advertising technology sales stood for 4.7% of total ad sales (2017), up from 4.0% (2016). We expect this share to grow to 7.8% by 2022 as the industry's push for advertising automation continues

Worldwide Digital Advertising Software 2017 Share Snapshot



Future View Of The Market

- End of the mobile revolution
- Video wins over TV, mobile 2x CTV, but CTV rules living room
- Blockchain to tackle ad fraud and arbitrage, first in video
- Voice-based assistants, AR/VR
- M&A activity

For More Information

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