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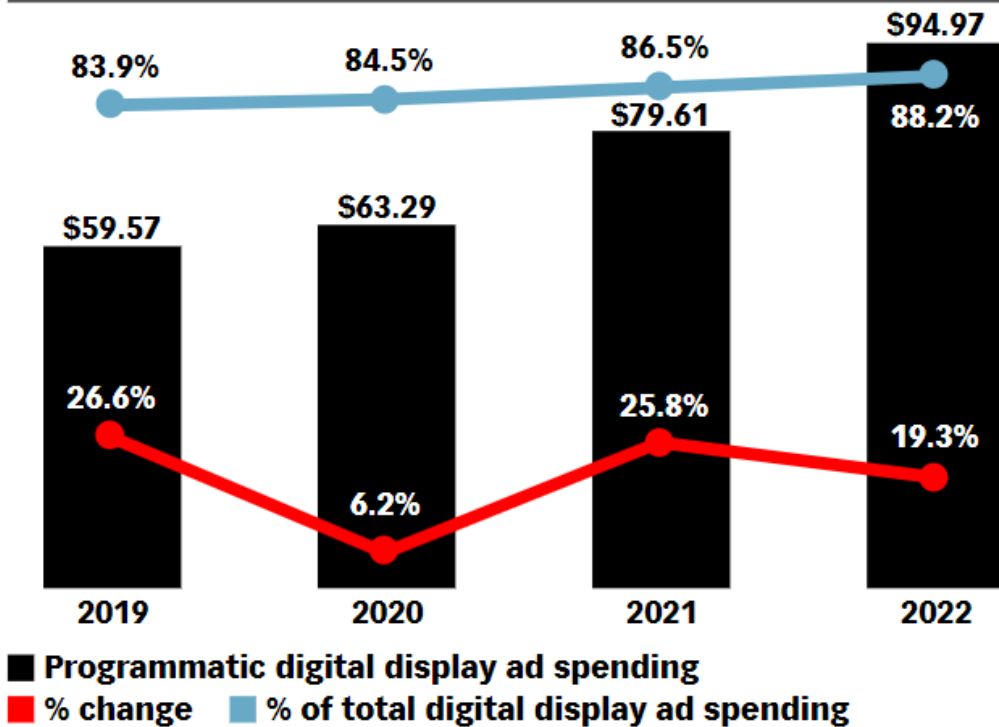
US Digital Display Advertising Is Weathering the Storm



The vast majority of digital display advertising in the US is bought and sold programmatically—that is, with automation, including programmatic direct setups and more traditional forms of real-time bidding (RTB). This year, these transactions will make up 84.5% of the digital display ad market.

US Programmatic Digital Display Ad Spending, 2019-2022

billions, % change and % of digital display ad spending



Note: digital display ads transacted and fulfilled via automation, including everything from publisher-erected APIs to more standardized RTB technology; includes native ads and ads on social networks like Facebook and Twitter; includes advertising that appears on desktop/laptop computers, mobile phones, tablets and other internet-connected devices
Source: eMarketer, July 2020

Fuente: Emarketer



Programmatic display spending in the US will continue to grow this year, despite the recession, but at a severely depressed rate before bouncing back in 2021. Programmatic advertising will be buoyed by mobile spending, which will rise by \$3.93 billion; by video spending, which will increase by \$2.83 billion; and by programmatic direct transactions, which will account for \$4.07 billion in incremental spending.

Which Segments Are Driving US Programmatic Digital Display Ad Spending Growth in 2020?

billions and % change

	Incremental programmatic digital display ad spending	% change
Device		
Connected TV	\$1.19	35.5%
Mobile	\$3.93	9.0%
Desktop/laptop	-\$1.41	-11.3%
Format		
Video	\$2.83	11.6%
Nonvideo	\$0.89	2.5%
Native*	\$2.55	6.2%
Channel		
Social	\$1.52	4.9%
Nonsocial	\$2.21	7.7%
Transaction method		
Programmatic direct	\$4.07	11.0%
Private marketplace (PMP)	\$0.39	3.5%
Open exchange	-\$0.74	-6.3%
Total	\$3.72	6.2%

*Note: digital display ads transacted and fulfilled via automation, including everything from publisher-erected APIs to more standardized RTB technology; category breakouts may overlap; read as open exchange ad spending will decrease by \$0.74 billion and programmatic direct ad spending will increase by \$4.07 billion in 2020; *includes various native formats, including video and nonvideo ads*
Source: eMarketer, Aug 2020

Fuente: Emarketer

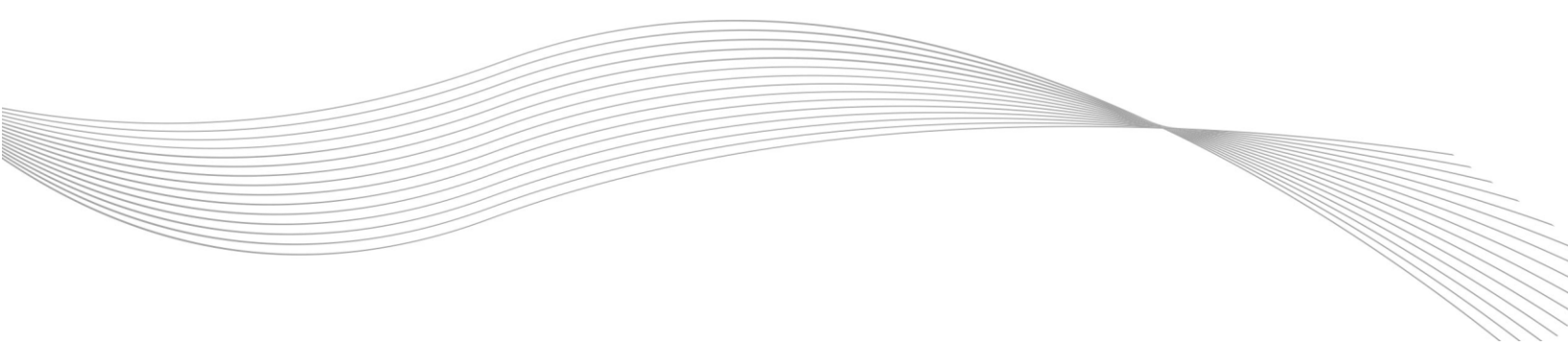


Spending on nonvideo programmatic display ads will increase by nearly \$900 million this year, but video ads are a much bigger driver of programmatic ad growth. Spending on video ads transacted programmatically will increase 11.6% to \$27.37 billion, and growth will accelerate to 31.3% next year as the economic effects of the pandemic subside.

Our US programmatic display estimates were last updated in October 2019. We also made some significant revisions to our underlying US digital ad spending forecast in March 2020, prior to the pandemic, that would have flowed through to these programmatic breakouts.

Now the pandemic's effects are layered onto those changes. Of particular note: We've revised our estimate of 2019 programmatic display spending upward, from \$57.30 billion to \$59.57 billion. While we're predicting slower growth, it is from a bigger base.

In October, we forecast overall programmatic display ad spending in the US would grow 19.5% this year, which would have translated to more than \$11 billion in incremental spending. We expected programmatic video ad spending to reach \$33.42 billion this year, thanks to a 22.8% growth.



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