ExchangeWire research

Demystifying deal ID: The future of programmatic trading

Hugh Williams
Senior Data Analyst, ExchangeWire

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EXECUTIVE SUMMARY

As issues such as brand safety, inaccurate measurement and fraud continue to take centre stage in the programmatic industry, buyers are turning to private marketplaces (PMPs) to tackle these issues and ensure high quality inventory.

Unlike an open marketplace, PMPs allow publishers more control over which buyers can advertise on their site, while they offer advertisers higher quality inventory. PMP deals come in many different shapes and sizes — some allow buyers and sellers to agree on criteria such as minimum price and type of ad unit, while others, such as automated guaranteed deals, also guarantee a number of impressions.

Behind these PMPs, working to ensure inventory is filled and buyer demand is met, is the deal ID. Deal ID-based trading involves a system generated number assigned by a publisher or supply side platform (SSP) that can be used by buyers to target pre-specified inventory, and works across all manners of private programmatic trades.

This report, in association with BidSwitch, was undertaken to examine the state of the deal ID-based trading market across the globe. It takes a close look at some of the key benefits that can be gained from this method of trading, as well as the limitations which must be overcome in the future.

Among our discoveries, we see that deal ID-based trades are already widely used throughout the world, with those transacting through them seeing improved brand safety (24%), better access to high quality inventory (24%) and improved ROI (21%). However, driving uptake among buyers and sellers not currently using deal ID is a challenge, with only 35% of this group saying they will incorporate this method of trading in the next 12 months.

If uptake among this group is to improve, we see that a number of obstacles must first be addressed. These include:

- Demystifying some of the complexities involved in setting up and transacting through deal IDs
- The scale and reach deal ID-based trading offers
- A lack of trust and transparency in the process

Despite these challenges, the growth of deal ID-based trading in the next year looks likely. Nearly three-quarters (73%) of those currently trading via deal IDs will increase the amount they trade through this method in the next year, with a quarter of US respondents predicting growth of over 90%.

We hope that this report offers you some insight into the current state, and the future of deal ID-based trading, and a good understanding of both the issues it faces, and the benefits it can offer buyers and sellers.

Hugh Williams
Senior Data Analyst, ExchangeWire Research

FOREWORD BY BIDSWITCH

As a company, BidSwitch is focused on providing a universal technical infrastructure that helps the global programmatic ecosystem efficiently connect and trade at scale. We are a kind of technical middleman, an infrastructure layer if you will — working hard behind the scenes to try to plug it all together and make it work.

This puts us in an interesting position to see the growth and constant evolution of the programmatic industry from a technology standpoint. Today, BidSwitch connects to more than 350 programmatic partners globally on both the demand and supply side — listening to and processing more than 400 billion ad opportunities for our partners each and every day.

Over the last 12 months, across that bidstream the proportion of deal ID-based bids and opportunities has continued to scale and grow. In August 2017, more than 21% of all bids that we processed had some kind of deal attached — representing approximately 38% of media spend through our infrastructure.

During that period, we have also seen the emergence of more and more Private Marketplaces (PMPs) from our partners. In our recent PMP guide, more than 60 of our Supply Side Platform (SSP) partners were operating their own PMP and this does not include other programmatic direct variations. It's an ecosystem that is scaling rapidly and as the "deal ID" takes on increasing share of revenue, we are starting to see more and more "deals only" SSP and publisher systems put into play. It's a continually growing ecosystem that is getting more and more complex to navigate.

All that growth and complexity breeds new and difficult challenges! Deal IDs were never the most efficient mechanism to begin with and are put to so many different kinds of uses that they have a tendency to break across the ad tech delivery food-chain. With so many operators involved in the link from the advertiser through to the publisher — it has also put a new emphasis on better tools to manage, report, troubleshoot and help scale support for deals creation and implementation as well.

So all of this prompted us to ask the question — what does the future hold for deal ID-based trading in all its wonderful forms? How does the industry view the on-going operational complexity and management? What are the key drivers and challenges driving deal adoption and how does it differ regionally?

In doing so, we are excited to have the opportunity to partner with ExchangeWire to present this research and try to take the pulse on the programmatic future for the deal ID-based trade.

Scott Neville
General Manager, BidSwitch

NOTE TO READERS

For the purpose of this report, we have defined deal ID-based trading and open marketplace trading as follows:

Deal ID-based trading — any programmatic trade that includes a deal ID — a system generated number assigned by a publisher or SSP (supply side platform) that can be used by buyers to target pre-specified inventory — e.g. private marketplaces (PMPs), preferred/priority deals, private auctions, programmatic direct, real-time/automated guaranteed, programmatic guaranteed.

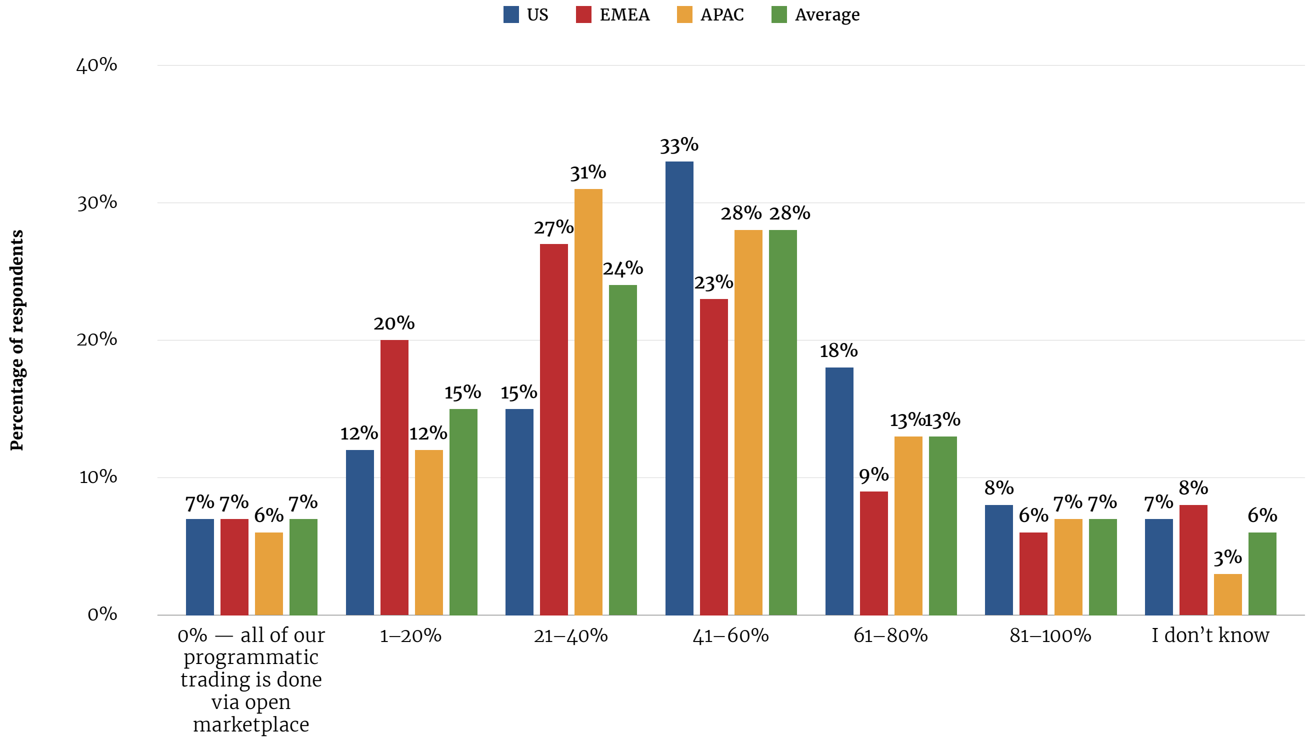
Open marketplace trading — trades where media buyers and sellers will agree on a range of impression criteria, but no ad inventory is pre-selected, impressions are bought in real-time.

FINDINGS

Globally, nearly nine in every ten (87%) media professionals use deal ID-based trades.

The US is ahead of APAC and EMEA — 26% of US respondents report using deal ID-based trading for more than 60% of their programmatic ad trades (compared to 20% in APAC and 15% in EMEA, see **figure 1**).

Figure 1: What percentage of your programmatic ad trading involves deal ID-based trading?



The current state of deal ID

Today, the deal ID marketplace is highly fragmented. Almost half (46%) of respondents use between 21 and 40 technology partners for deal ID-based trades (**figure 2a**).

However, the breadth of choice available to media professionals is not viewed favourably.

Seven in ten (69%) respondents currently running deal ID-based trades feel there are too many people involved in the set-up and transaction (**figure 2b**).

We asked industry thought leaders whether they would work with fewer partners if they were able to access the same quality and quantity of inventory.

Simon Harris, Head of Programmatic Activation, Dentsu Aegis Network, feels that the number of technology partners used is too high at present. He says: "*That number seems incredibly high and I would imagine creates significant operational overheads which preclude the agency from focusing on what is important, optimising towards client results.*

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Figure 2a: How many technology partners does your organisation currently engage with for deal ID-based trading?

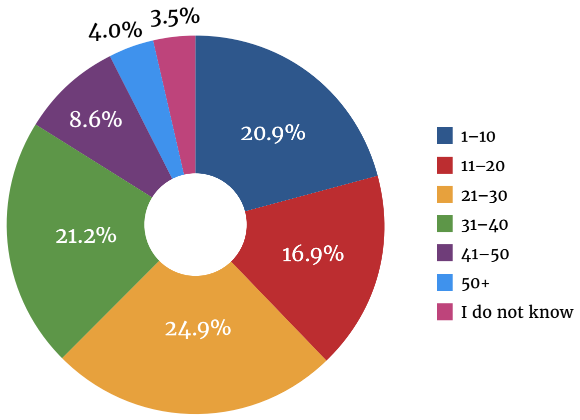
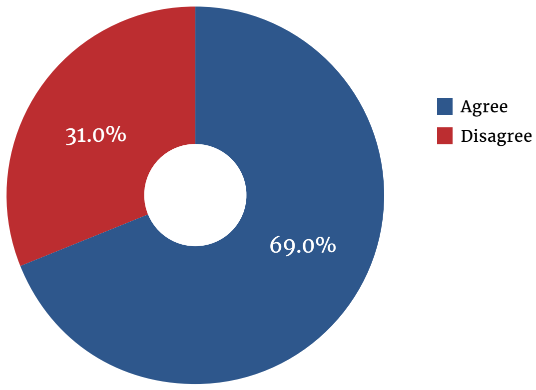


Figure 2b: "There are too many people involved in the set-up and transaction of a deal ID-based trade" Those who do use Deal ID



"My advice to others struggling with significant levels of complexity would be to rationalise on this so you can focus on deeper relationships with publishers."

Max Chanoch, Director of Product Development, Kargo feels that most in the industry would take this option. He says *"You should absolutely strive to work with fewer partners. Quantity doesn't equal quality and if the average person goes to the same 50 or so sites over and over, you could probably work with 300 or even fewer sites and still have 100% coverage of smartphone users."*

Jason Barnes, Vice President APAC, PubMatic, agrees, highlighting that publishers and buyers would opt for fewer partners, as to work with more tech partners *"would likely lead to increased complexity and higher fees".*

He goes on to say that *"However, one of the key problems with our industry is many niche technology companies have emerged, making unsubstantiated claims about the value they provide to the ecosystem. This is why education is a huge focus for us, and industry bodies like the IAB, so publishers and buyers are able to make informed decisions about their sales and marketing strategies. We have found that the most effective strategy is to limit the number of tech partners you deal with and ensure they are well established with a strong reputation, robust product offerings, and a scalable global infrastructure".*

Overall, the majority (84%) of media professionals say deal ID-based trading is more complex to run compared to open trading (**figure 3a**).

However, more than three quarters (76%) of media professionals who use deal ID-based trading say that the benefits gained are sufficient to offset the complexities (**figure 3b**, page 8). Only half (51%) of those not using deal ID-based trading today agree, highlighting a lack of understanding of the benefits.

Figure 3a: "Deal ID-based trading is more complex to run compared to open trading"

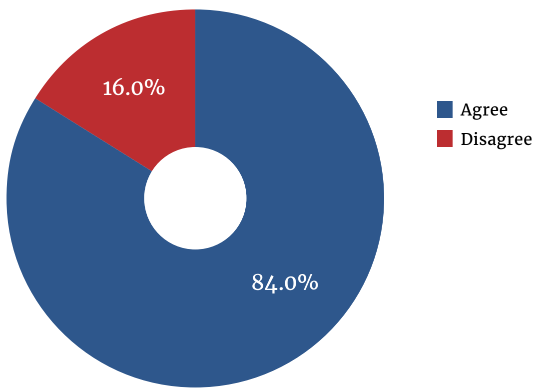
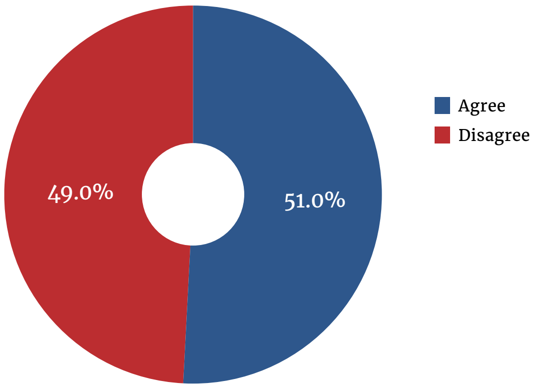
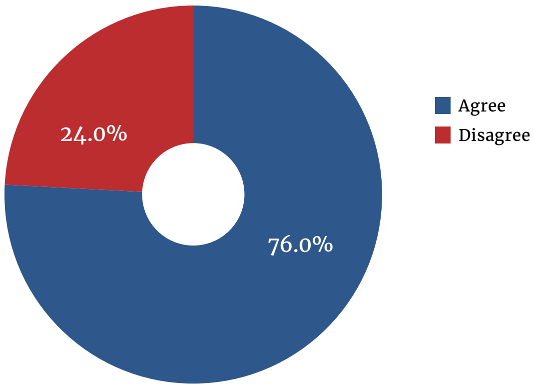


Figure 3b

“The benefits gained from deal ID-based trading are sufficient to offset the complexities in the setup and transaction of the deals” Those who don't use deal ID



“The benefits gained from deal ID-based trading are sufficient to offset the complexities in the setup and transaction of the deals” Those who do use deal ID

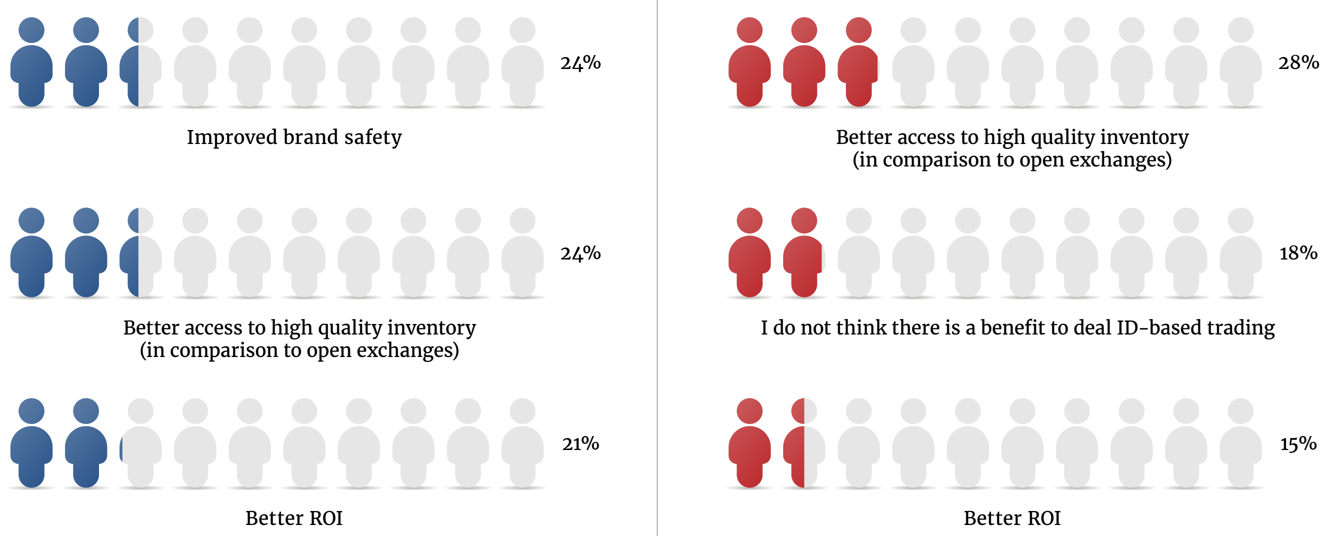


A difference in opinion

There are stark differences in opinions of the benefits of deal ID-based trading between those currently trading via deal IDs, and those who are not.

Figure 4: What do you believe is the primary benefit of deal ID-based trading?

Those using deal ID: / **Those not using deal ID:**



A quarter of all media professionals using deal ID-based trading say the top three benefits are: Improved brand safety (24%); Better access to high quality inventory (24%); and Better ROI (21%). A fifth (20%) said viewability was the primary benefit, while the access deal ID-based trading provides to unique first party data (7%) and preferential pricing considerations (3%) scored significantly lower.

Almost one in every three (28%) respondents not using deal ID-based trading believe it would give better access to high quality inventory and 15% believe they would see better ROI. However, 18% believe there is no benefit.

Jacqulyn Barbieri, Manager of Media Advisory Services, Oath says that all of the above are benefits of deal ID, explaining that *"many premium publishers prefer to transact via deal IDs, or in certain cases only make their inventory available via deal IDs / PMPs. The inherent viewability and quality of these premium publisher sites is then associated with the deal because the inventory that comprises it is more premium than what is available through the open auction".*

Chanoch also agrees with the findings, adding that: *"for the brands that are interested in storytelling on small devices, they need to use high-impact creative that renders properly and is appropriately associated with the right content, two things that are very difficult (if not impossible) to achieve in an open market environment".*

Harris, on the other hand, feels that despite these benefits, deal IDs are in a challenging position: *"Deal IDs are one route to ensuring that advertising ends up appearing against high quality content. They definitely made sense five years ago but with the rapid adoption of header bidding, private auctions are no longer the only way to gain access to significant volumes of high quality inventory. This is leading some to question the long-term role of Deal ID-based trading compared to more operationally efficient ways of managing access to premium inventory".*

Barnes says that in addition to the benefits touched on in the report, *"fee transparency is an additional important benefit. If the buyer and publisher agree to a fixed fee for inventory, then there is better clarity on what is being paid by the buyer and what the publisher will receive".*

Our findings highlight that in order to fully understand the benefits deal ID-based trading offers, media professionals must experience this method first hand.

There is also a large variation in the most widely used deal type, with respondents splitting their deals between the following:

- 31% of respondents say traditional private marketplace (PMP) deals make up over half of their deal ID-based trades. These are pre-negotiated criteria without a guarantee on impressions or inventory.
- 30% say real-time / automated guaranteed PMP deals make up over half of their deal ID-based trades. These are pre-negotiated criteria with a guaranteed number of impressions.
- 41% say always-on, multi-publisher, open PMP deals make up over half of their deal ID-based trades. These are preset deals which are open to anyone looking to target / offer a pre-specified inventory package.

On the whole, always-on, multi-publisher, open PMP deals are slightly more widely used than real-time, automated guaranteed PMP deals, and traditional PMP deals. We asked our thought leaders which deal type they find to be the most popular:

Barnes agrees that always-on, multi-publisher, open PMP deals are more widely used, due to their *"efficiency and scale"*. He says that *"it is much more efficient for a buyer to set up an always-on PMP deal targeting an agreed set of publishers at an agreed price and then run campaigns when they see fit.*

"Trading is getting more complex with more brands and supply sources operating across many channels as well as strict requirements around measurability and brand safety. Setting up always-on PMP deals makes it easier for buyers to trade with us, driving increased revenue for our publishers. It is also easier to scale PMP campaigns when multiple publishers are targeted, which is appealing for campaigns with a reach objective such as a fast-moving consumer goods (FMCG) product launch.

"One-to-one PMPs are still important when specific publishers or contextual environments are being targeted. Additionally, some publishers prefer the ability to approve each campaign prior to launch, and one-to-one PMPs do offer increased control."

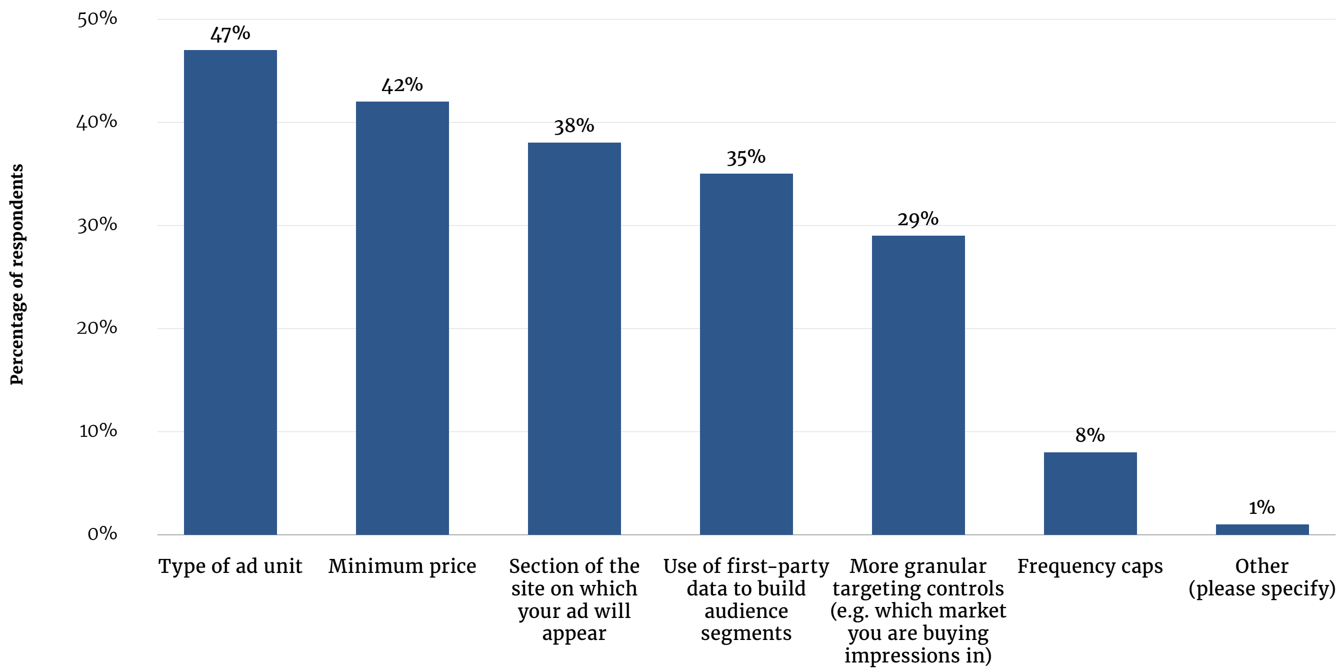
From the demand-side perspective, Harris says that *"Most buyers see the benefits of always-on deals that augment open auction activity alongside the use of tactical PMPs. It is definitely not a case of using one over the other, rather using them in a complementary way to the benefit of our advertisers".*

Chanoch feels that always-on deals are superior *"because it's hard to scale audiences across any single publisher, as consumers are bouncing around reading stories on their phones. When you can combine the protections and quality assurances of a PMP deal with the reach of having multiple publishers, you're able to get the best of both worlds at a scale that's similar to the open market".*

While open deals seem more common, most likely due to their ease and efficiency, Jacqulyn Barbieri, Manager of Media Advisory Services, Oath, says her business's preference is for *"advertiser specific 1:1 non-guaranteed deals".* This is because these type of deals *"provide both sides [advertisers and publishers] with a high level of transparency and assurance as to the validity of the supply.*

"These types of deals allow both parties to negotiate rates that are in-line with their overall media plan (including non-programmatic buys). We find that in many cases the performance of always-on multi-publisher deals does not justify the premium that these deals command compared to the open auction".

Figure 5a: Of the available criteria which can be agreed upon in deal ID-based trading, which do you consider the most important?

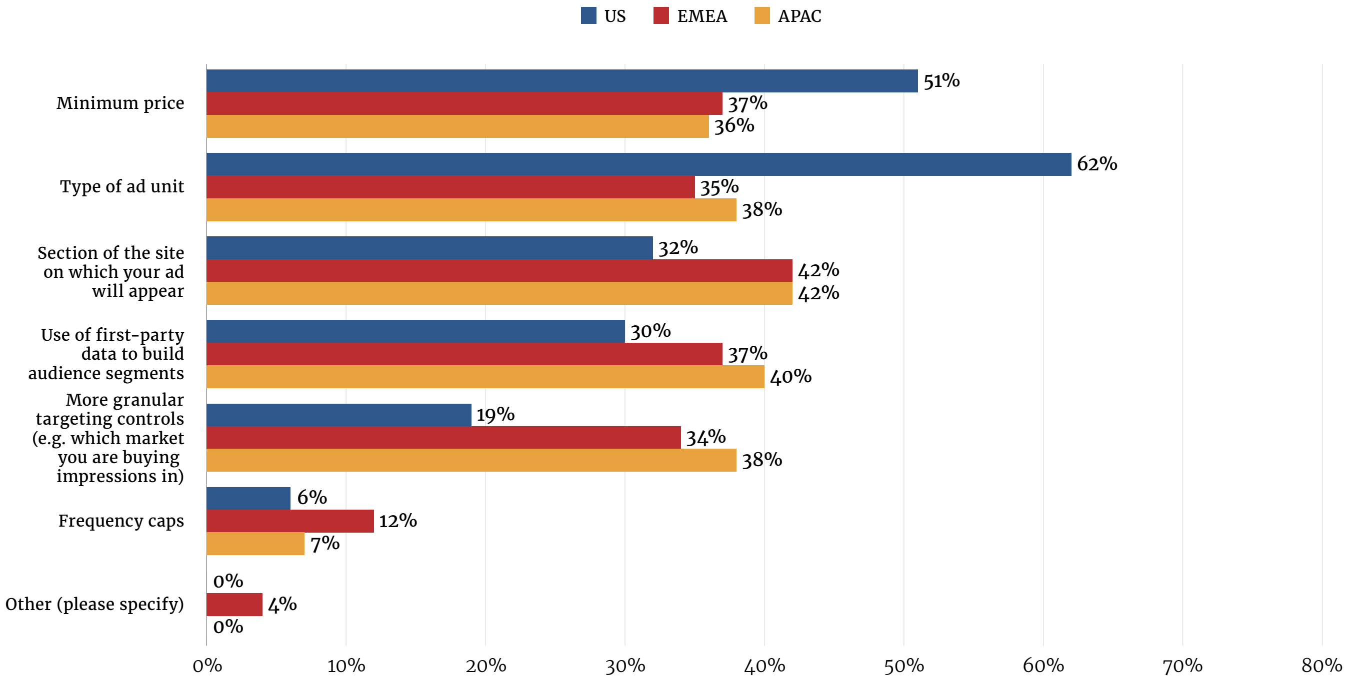


Type of ad unit most important to deal ID users

Being able to select the type of ad unit is the most important factor which can be agreed upon in deal ID-based trading, according to 47% of respondents using deal IDs. This is followed by minimum price (42%).

There are also variations between regions, when selecting their most important criteria. **Figure 5b** shows which criteria respondents in each region who are currently using deal ID-based trading, rate as the most important criteria offered by this method.

Figure 5b: Of the available criteria that can be agreed upon in deal ID-based trading, which do you consider the most important? (Select two). Those who are using a Deal ID



US: Those using deal ID in the US cite minimum price (51% — compared to 37% in EMEA and 36% in APAC) and type of ad unit (62% — compared to 35% in EMEA and 38% in APAC) as the most important criteria which can be agreed upon in deal ID-based trading.

Explaining this, Chanoch says that *"one reason why price is less of a driver in EMEA and APAC compared to the US is that typically the EMEA and APAC markets are more focussed on being able to find scale via PMPs, compared to the US where the size of the market means scale is less of a challenge.*

"Our experience is that the type of ad unit is definitely a key driver amongst demand partners in EMEA and APAC as they increasingly seek to run impactful brand creative via PMPs on premium publishers. In this context, price is less of a consideration [than in the US] as those in EMEA and APAC expect to pay a premium for these buys".

EMEA: Respondents from EMEA rate the site your ad will appear on (42% — compared to 32% in the US), and use of first party data to build audience segments (37% — compared to 30% in the US) as the most important criteria which can be agreed upon in deal ID-based trading.

Harris notes that *"EMEA advertisers are acutely aware of context being of critical importance in the success of campaigns, but I'm sure their US counterparts are also.*

"So what might be driving the differences observed? In recent times advertisers in EMEA have had to deal with a greater amount of extremism than their US counterparts, and deal IDs are seen as a route to avoiding non-brand safe content in brand safe domains. As for data [the use of first party data to build audience segments], again there could be a broad range of reasons for the discrepancy. It may be performance led, or it may be publishers in the US are more amenable to availing data unbundled from supply than publishers in EMEA, where this is still a relatively new development".

APAC: Two-fifths (42% — compared to 32% in the US) of APAC-based respondents cite the section of the site their ad will appear on, and use of first party data to build audience segments (40% — compared to 30% in the US) as the most important criteria which can be agreed upon in deal ID-based trading.

Barnes points to limited targeting capabilities and cultural factors as reasons which could be behind the APAC findings: *"Ad networks are still fairly prevalent in parts of APAC and buyers have been using them for many years with limited targeting available. So the ability to now target specific sections is highly valued, while in the US, it could be deemed a "standard feature" for the more sophisticated buyer. Cultural factors may also be in play. For example, countries like Japan have very high risk aversion, so a guarantee on where your ad will appear is highly attractive. Additionally, quality first-party data is very hard to come by in most parts of APAC as most publishers and Telcos have kept it to themselves, so the ability to agree on first-party data usage to build segments may be novel and prized".*

Obstacles when using deal ID

Globally, achieving scale is the biggest challenge our respondents face when running deal ID-based trades (see **figure 6**). The issue is felt most strongly in the US (64%), followed by EMEA (50%) and APAC (48%).

Those in the US also feel the pain of a lack of trust/transparency more than their peers in EMEA and APAC (61% vs. 42% & 43%). US media buying professionals also believe a lack of education and understanding is holding dead ID-based trading back (59%).

Jacqulyn Barbieri says: *"operational factors are the primary challenges to activating PMPs. In my opinion there is a lack of knowledge regarding when advertisers should rely on deal IDs vs. open auctions. Digital advertisers often tack on a lot of data targeting to campaigns that are targeting deals which is counter to the purpose of publishers packaging specific inventory for buyers".*

EMEA respondents are the only ones feeling a financial challenge, 48% say deal ID-based trading is too expensive. Harris feels that the high price could force advertisers away from deal IDs, saying *"managing Deal IDs can be challenging at scale both in terms of set-up and maintenance, that's true for all agencies, which is one reason we feel many will move towards other methods of gaining priority".*

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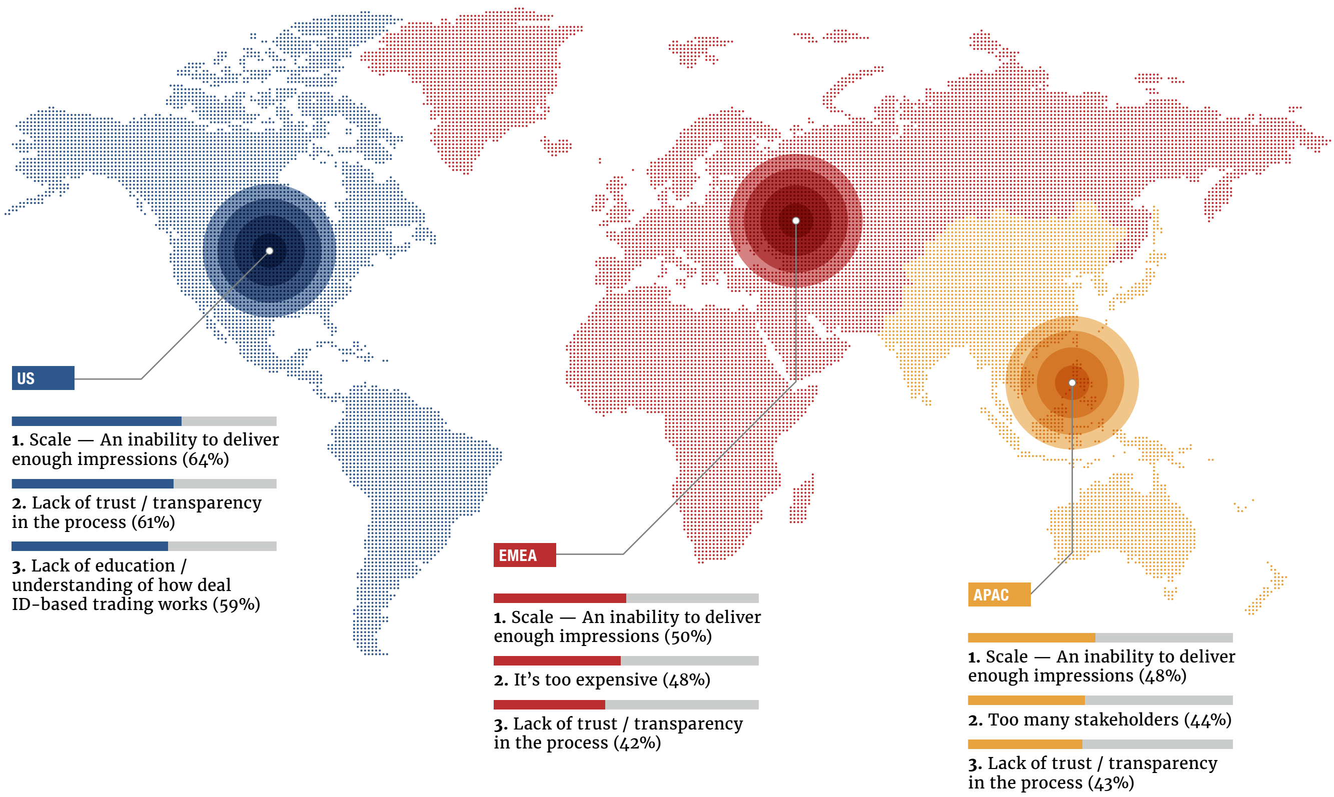
APAC media professionals are the only group who say that too many stakeholders is a challenge (44%). Jason Barnes argues that while *"too many stakeholders is certainly an inhibitor as well, as it adds further complexity to the ecosystem"*, perhaps the key challenge facing deal ID usage is *"the simple fact that digital advertising, especially programmatic advertising, is nascent in parts of APAC, and it is used primarily for performance campaigns.*

"If CPC is a key metric for a campaign, then it is unlikely that a PMP will be effective in delivering outcomes. As these markets mature and more brand campaigns are executed via automated channels, we will likely see increased eCPMs and greater use of deal ID-based trading".

Figure 6: Which of the following are the biggest obstacles your organisation faces when using deal ID-based trading?)



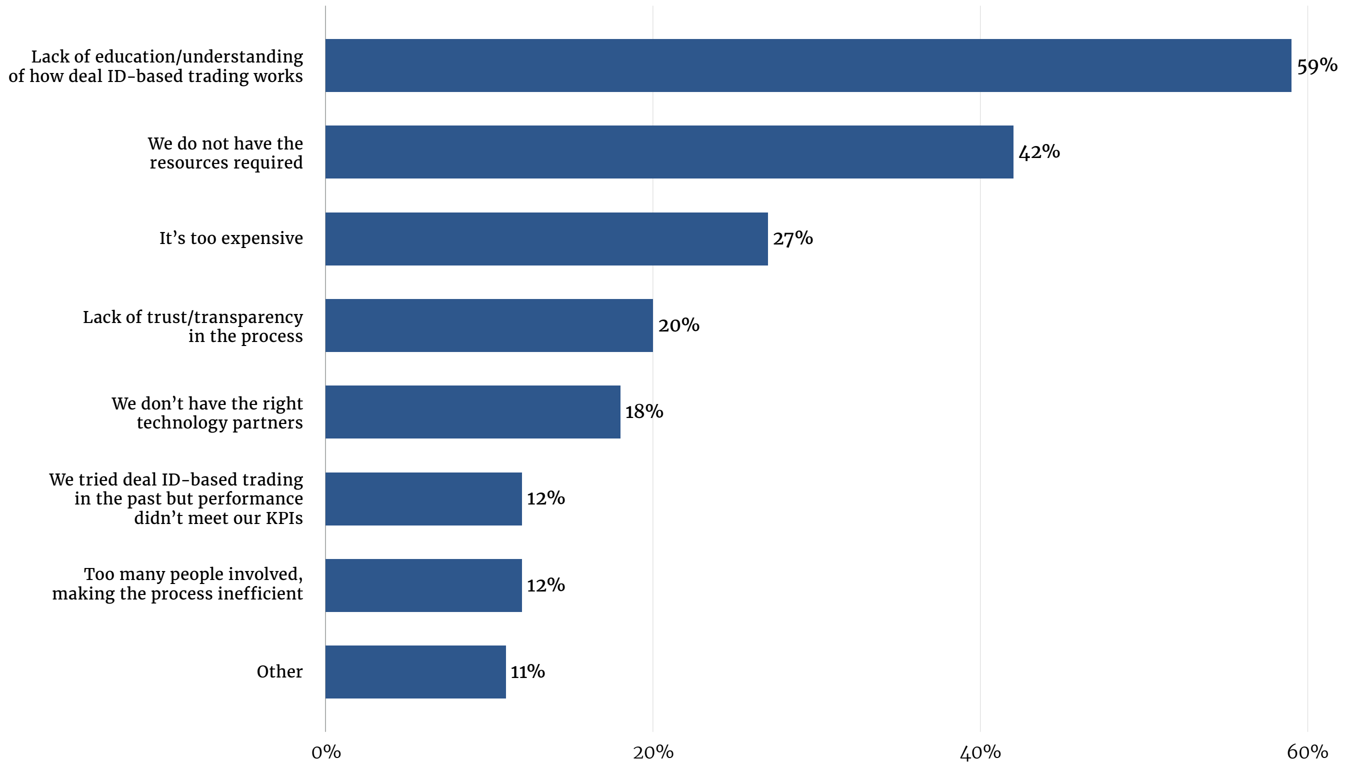
Chanoch says that a lack of transparency is evident, and *"if brands truly understood how deal ID worked, they would have greater trust in the process and they would know that they are more likely to deliver not just a certain quantity of impressions, but a higher quality of those impressions.*

"Unfortunately, many buyers are used to working in the open exchange, so they created processes that optimised that choice, including layering on brand protection and content safety best practices, but when you apply those processes to deal IDs there can be major issues. And the reason is that deal IDs work differently and don't need the traditional desktop layers. So we need to work with marketers to help them understand the differences and create new best practices together. You just can't expect that what was created for desktop open performance is going to work for a private, mobile, branding experience".

Obstacles to adopting deal ID

The obstacles to adopting deal ID-based trading, on the other hand, are largely educational. Almost six-in-ten (59%) of respondents say that a lack of understanding of how deal ID-based trading works is the main reason they do not participate in this means of programmatic trading. In addition to this, these respondents do not feel they have the resources required to begin deal ID-based trading. It is clear that if uptake is to increase among this group, there must be more education around how these deals work, and the necessary resources required to effectively implement them into a programmatic strategy.

Figure 7: What are the main reasons you do you not participate in deal ID-based trading?

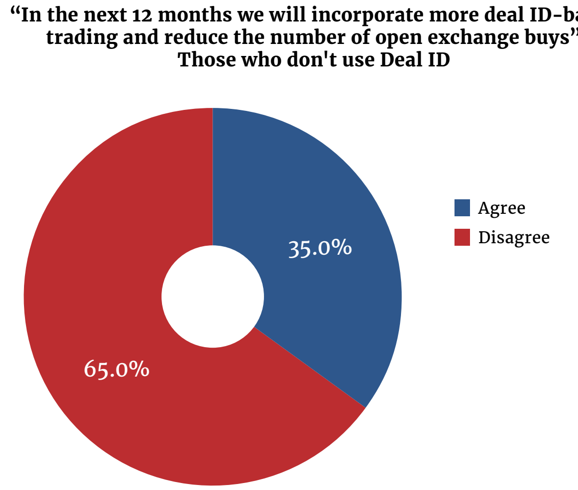


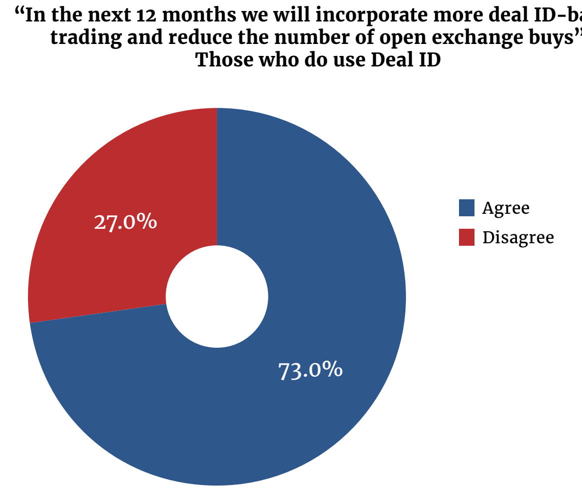
The future of deal ID-based trading

Deal ID-based trades will continue to grow over the next 12 months, primarily driven by increased use by those who are already using this method of trading. However, 35% of non-deal ID users are also interested in using deal ID-based trading in the next 12 months. If this is to happen, focusing on education to improve understanding of deal IDs is crucial, as shown in **figure 8**.

The biggest growth market will be the US. Almost six-in-ten (59%) US respondents already using deal ID-based trading will increase their use of this method by over 60%. This compares to 44% in APAC, and 37% in EMEA.

Figure 8





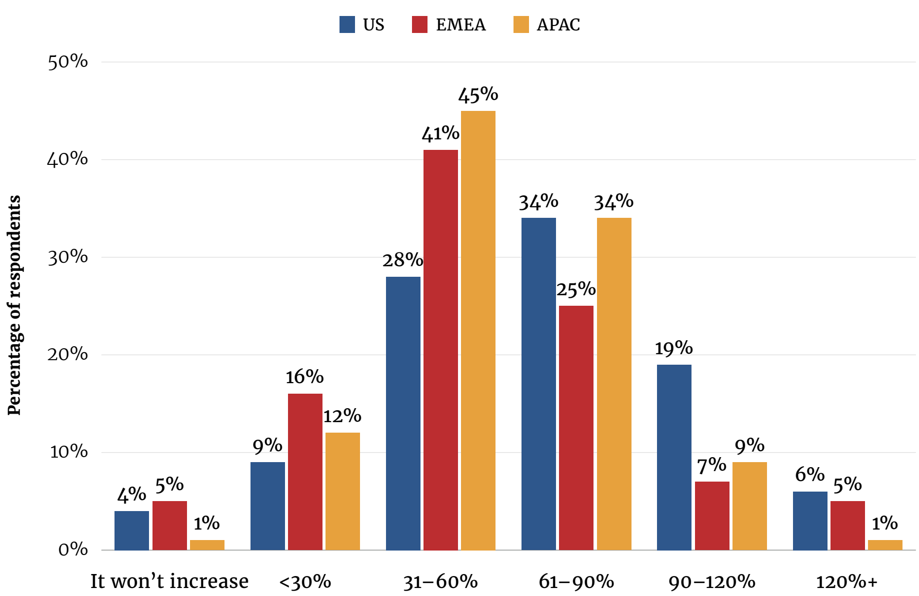
Furthermore, although 73% (see **figure 8**) of those already using deal ID-based trading globally intend to increase this form of buying (and decrease their levels of open exchange buys) in the next year, only 35% of those not using deal ID intend to do the same. We asked our contributors why they thought this might be.

Barbieri listed two possible reasons: *"I think to a large extent demand mix determines whether or not deal id based trading should be utilised. Those already using deals/PMPs likely have a demand mix that skews more heavily toward video which is a primary driver for deal ID based purchasing. Secondly, there are operational hurdles to implementing and maintaining PMPs. Those respondents who are already staffed and equipped to support deal IDs likely display a bias toward continuing the practice".*

The difference in these groups comes down to whether buyers are willing to pay a premium, according to Barnes. He says that *"those buyers targeting specific audiences that want trusted environments to trade in, see the value of deal ID-based trading. However, buyers that are chasing cheap inventory or pure performance based campaigns (bring me clicks!) will not find PMP that attractive as scale and ROI are harder to achieve".*

On the other hand, Chanoch feels these variances can be boiled down to an educational issue.

Figure 9: How much will your use of deal ID trading increase (those who currently use deal ID trades)?



"While people are becoming more aware of the severe challenges to the open-ended exchange, such as URL spoofing, among other types of fraud, they may mistakenly believe that open exchanges are the only way to maximize scale.

"The industry needs to do a better job communicating that PMP scale is achievable. PMPs are safer/known quantities and you can more easily target your creative to what's most contextually relevant to your brand. Additionally, PMPs are geared for high-quality creative, which is what ultimately drives brand recall. The time of dumbing down a campaign to the lowest common denominator, because that's all that works on the open exchange, is over".

Harris notes that those already using deal IDs are continuing to do so because *"deal IDs offer security to advertisers and buyers. It is therefore unsurprising that many do not want to move away from this model. The advertisers who are not using deal IDs may have opted out for a number of reasons. For example, they may prefer not having the operational overheads of curating their marketplace via deal IDs".*

Enabling deal ID-based trades

There is work to be done to enable media professionals to increase the amount of deal ID-based trading they do.

Figure 10: What would make transacting deal ID-based trades easier? (Select two).

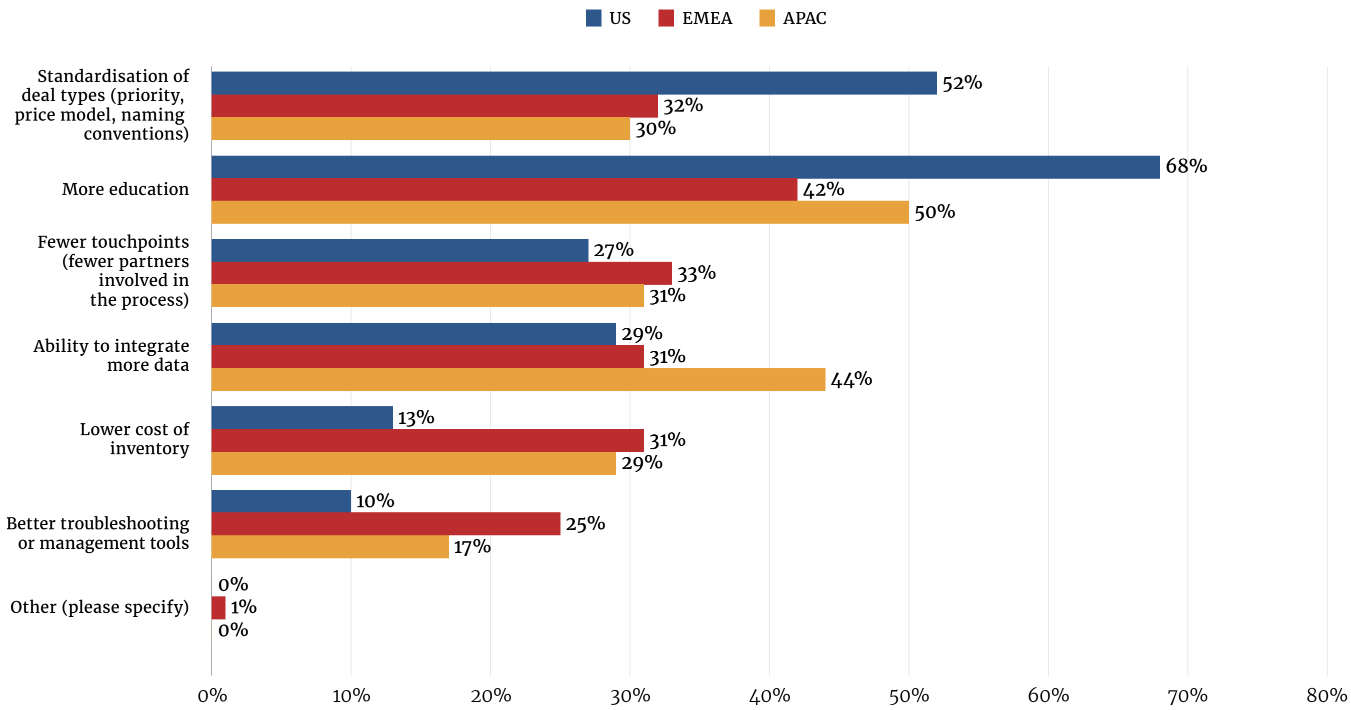


Figure 10 shows that respondents in EMEA feel the need for improvements across the board if deal ID-based trades are to become easier. Areas such as better troubleshooting tools, lower cost of inventory and fewer touchpoints, which are considered marginally less important in other regions, are of near equal importance to better education and standardisation of deal types, when making transacting deal ID-based trades easier in EMEA. On the other hand, the US feels the focus should be on standardisation of deal types (52%) and education (68%). They place less emphasis on better troubleshooting tools (10%) and lower cost of inventory (13%).

Barbieri agrees with the majority of respondents, feeling standardisation and transparency in the deal ID-trading process is vital if these trades are to be made easier. *“Transparency upfront between advertisers and publishers regarding campaign objectives, creative formats that are accepted, advertiser/publisher blacklists. 90% of deal troubleshooting could be eliminated if there was true transparency upfront about the available inventory and its compatibility with advertiser creatives. Clear expectations around pricing would also greatly help achieve this.”*

Respondents from APAC agree that there needs to be more education around deal ID-based trades, and feel the ability to integrate more data into the buying process will also make transactions easier. This is something Barnes is seeing too, while he also highlights that deal ID-based trading will be easier once the APAC market has matured. *“Macro influences like market maturity will take time, and education is key to moving this along. I am seeing a great willingness among APAC publishers and buyers to learn and progress, so I am confident the process will be swift. I believe in a utopian future for the programmatic market in APAC, where we can achieve increased efficiency through scaled deal ID-based trading within a transparent environment, comprising fewer world-class ad tech companies and the ubiquitous use of high quality data. It may seem daunting, but the endgame is no less than a profitable and trusted digital advertising system, which I believe is well worth working towards”.*

SUMMARY AND CONCLUSION

It is clear from these findings that deal ID-based trading is on the rise. Industry issues such as brand safety, fraud, viewability and general lack of trust have fuelled the need for a more transparent, higher quality programmatic trade. This is a gap which deal IDs can bridge — our results show that, of those using deal IDs, 24% feel improved brand safety is the primary benefit. The same amount see better access to high quality inventory (in comparison to open exchanges) as the primary benefit.

Despite this, there are obstacles to deal ID being the future for programmatic trading. While these vary across each of the regions we looked at, respondents in EMEA are more price conscious, while those in APAC feel the number of stakeholders is constraining deal ID's growth. However, two factors which all regions agree are hindering deal IDs are scale, and a lack of trust and transparency in the process.

The issue of scale is a sign that deal ID-based trading still has room to grow, and as the numbers on the buy and sell-side enabling deal ID-based trading rises, concerns around scale should be addressed. We hypothesise that the fact that respondents cite a lack of trust and transparency in the deal ID-based trading process is symptomatic of a wider concern around measurement and ROI in programmatic advertising, caused by walled gardens such as Facebook. It could also imply an overarching lack of education and understanding around the nuances, complexities, and troubleshooting techniques surrounding deal ID.

Clarity around deal ID-based trading must improve

The complexities of deal ID-based trades which are evident from this report are unsustainable, and must be improved upon if usage is expected to grow. Ironically, though it began as an attempt to recreate a traditional insertion order (IO) process for the automated world of programmatic trading, deal ID usage has actually created more complexities. An overwhelming majority (84%) of all respondents say that deal ID-based trading is more complex to run compared to open trading, while almost half (49%) of those not using deal ID feel the benefits gained from this type of trade do not offset the complexities in setup and transaction.

As with any new technological practice in ad tech, there is an inherent learning curve involved before things become trusted and widely adopted. Continuing to proactively educate the wider advertising, publishing and programmatic communities around how deal IDs work, the benefits available, and supporting such initiatives through troubleshooting techniques and best practices, could engender more confidence and usage in the process.

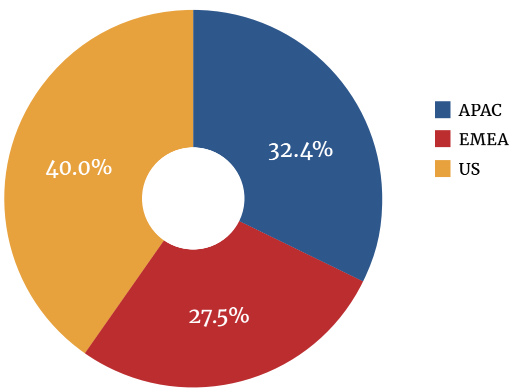
However, simultaneously, there is an opportunity to simplify and standardise deal ID set-up and transaction process from the technology standpoint as well. Going forward, there is a chance for industry players to come together to form a unified way to enable programmatic deals. Similarly to how the programmatic industry is pulling together to tackle fraud, if it can do the same to address the complexities of deal ID, the future of programmatic deals looks bright — taking big steps toward ensuring greater transparency and improved brand safety for programmatic advertising.

SAMPLE AND METHODOLOGY

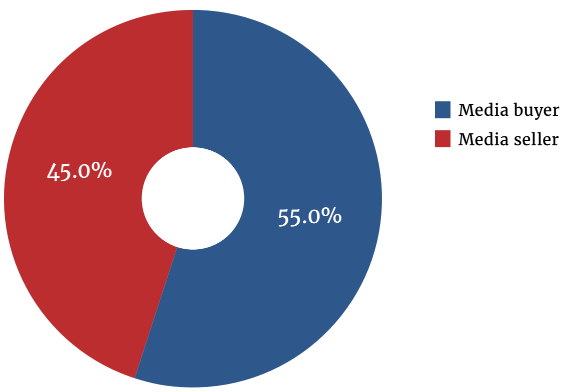
The report is based on a survey of 672 digital marketing professionals from APAC, EMEA and the US, between June and July 2017.

The following graphs represent the split of our respondents:

Which market do you work in?



Are you a media buyer or a media seller?



ExchangeWire and BidSwitch would like to thank all those who took the time to complete the survey.

If you have any questions about this report, please contact Hugh Williams, Senior Data Analyst at ExchangeWire via email at hugh@exchangewire.com.

ABOUT OUR CONTRIBUTORS

Max Chanoch

Director Product Development, Kargo

With nearly 10 years of experience building, measuring and optimizing products in the media space, Max is Kargo's Director of Product Management, leading Kargo's Programmatic and Business Intelligence global initiatives, including the design and rollout of Kargo's SSP. Previously at Justin Alexander, Max was the Director of Product, Digital where he ran all domestic and international marketing spend. Max began his career at Worldnow (now Frankly) and comScore, where he built products for 500 local media publishers and measured/ optimized telecom web properties.

Jason Barnes
VP, APAC, PubMatic

Jason is the Vice President for Asia Pacific at PubMatic where he has led the expansion of the business across Asia over the past three years. He is based in Singapore and manages offices in Australia, Japan and India. He was previously Head of Commercial Development at News Corp Australia where he launched and managed their programmatic trading as the publisher moved into automated trading.

Jason brings over 15 years of digital experience to the role from a number of senior positions in Asia and Europe. Before joining News Corp in early 2008, Jason spent four years at Fairfax Digital as Business Development Director where he established their mobile business and prior to this was responsible for content and corporate subscription at FT.com in London.

Jason holds an MBA from Macquarie Graduate School of Management.

Jacqulyn Barbieri
Manager of Media Advisory Services, Oath

Jacqulyn leads private marketplace strategy and operations for the BrightRoll DSP. Her team partners with BrightRoll DSP clients to activate supply as a strategic pillar for campaigns with solutions that grow advertiser performance. Prior to Oath, Jacqulyn worked in financial services for 7+ years and earned her MBA at the Anderson School of Management at UCLA in 2016.

Simon Harris
Simon Harris leads the optimisation teams at Dentsu Aegis Network in London and has been instrumental in creating a modern and progressive trading operation that is fully integrated into the planning teams within the group. He has a depth of experience in both technology platforms and data & his team has won awards for their use of data to drive business results.

Simon boasts more than a decade's experience in digital advertising, holding senior programmatic positions at three holding groups and working with some of the industry's most respected advertisers including Microsoft, GM, Zurich, Exxon, BA, Shop Direct, Nike, AMEX, Unilever, BMW, Kimberly Clark, and Burberry.

He recently was named one of the most influential people in digital media by the Drum and helped judge this year's ExchangeWire awards. He is a regular speaker at industry panel events including most recently the Rubicon Project annual summit discussing topics such as auction dynamics and the future direction of programmatic buying.

ABOUT BIDSWITCH

BidSwitch is focused on continually pushing the boundaries on what programmatic advertising can do. Engineered by IPONWEB, BidSwitch was created to help programmatic technology companies meet the challenges and redundancies produced by the rapidly expanding global real-time ecosystem. As a company, BidSwitch is completely neutral and never takes a position on media. We are focused on solving the underlying technical complexities and inefficiencies that hamper platform interconnectivity and trading at the infrastructure level.

Today, BidSwitch facilitates more than 350 supply and demand technology partners globally to connect and trade media across the display, mobile, native, video, TV, DOOH and VR ecosystems — all via a single standardised integration. By integrating with BidSwitch, partners can instantly access hundreds of platforms through normalised protocols. The unique myBidSwitch UI includes features that make maintaining, optimizing and customizing relationships between supply and demand fast and easy.

ABOUT EXCHANGEWIRE

ExchangeWire tracks global data-driven and programmatic advertising, media buying trends, and the ad tech and mar tech sectors. Delving deep into the business of automated media trading and the technology that underpins it across multi-channels (online display, video, mobile and social), the site aims to keep readers up to data on all the latest news and developments.

ExchangeWire provides opinion and analysis on the following sector companies: specialist media buyers, ad traders, ad networks, media agencies, publishers, data exchanges, ad exchanges and specialist ad tech providers in the video, mobile and online display markets.

www.exchangewire.com | research@exchangewire.com

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