

2023



Programmatic barometer

2023 ANNUAL REVIEW

<https://www.alliacedigitale.org> |

POWERED by
adomik



Why a programmatic barometer ?

- 1- Analysing **the programmatic market** in depth
- 2- Bring more insights to the market, with greater **granularity** and more **regularity**
- 3- Greater clarity for all players in **the value chain**

Scope of the barometer

19 SSP data sources :

- Adswizz
- AdYouLike
- Amazon TAM
- Criteo
- Equativ
- Freewheel
- Google Ad Manager
- Improve
- Index Exchange
- Magnite DV+
- Mediasquare
- Pubmatic
- OpenX
- Outbrain - Partial data
- Teads
- Triplelift
- Triton
- Xandr Monetize
- Yahoo!

- *Taboola not included*
- *Walled garden not included: YouTube, Amazon, etc.*

Scope of the barometer

Cohort of régies stable between 2022 and 2023 :


40

Customer services
adomik

>1500

Publisher sites
and App

- *TV channels not included in the cohort*

- 
1. **Summary by type of inventory** (Display, Video, Native, Audio)
 2. Analysis by sector
 3. Analysis by **annonceur**
 4. Analysis by **DSP**
 5. Analysis by **format**
 6. **CPM** analysis
 7. Analysis by **deal type**
 8. Analysis by environment (web/app)
 9. **Supply path** analysis
 10. **Key points**



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1. 2023 summary

Programmatic Display down and programmatic Native and Audio are growing

Comparison 2023 vs 2022

Summary *



		Investments	CPM	Impressions
Display		-9%	-4%	-5%
Native		+10%	+4%	+6%
Audio		+58%	+8%	+46%
Video*		+1%	-14%	+18%





* Programmatic investment excluding TV channels, YouTube, social, search and DOOH - Taboola and Outbrain not included.

A first half marked by a sharp fall in Display, followed by an improvement in the second half

Comparison 2023 vs 2022

Summary by semester*



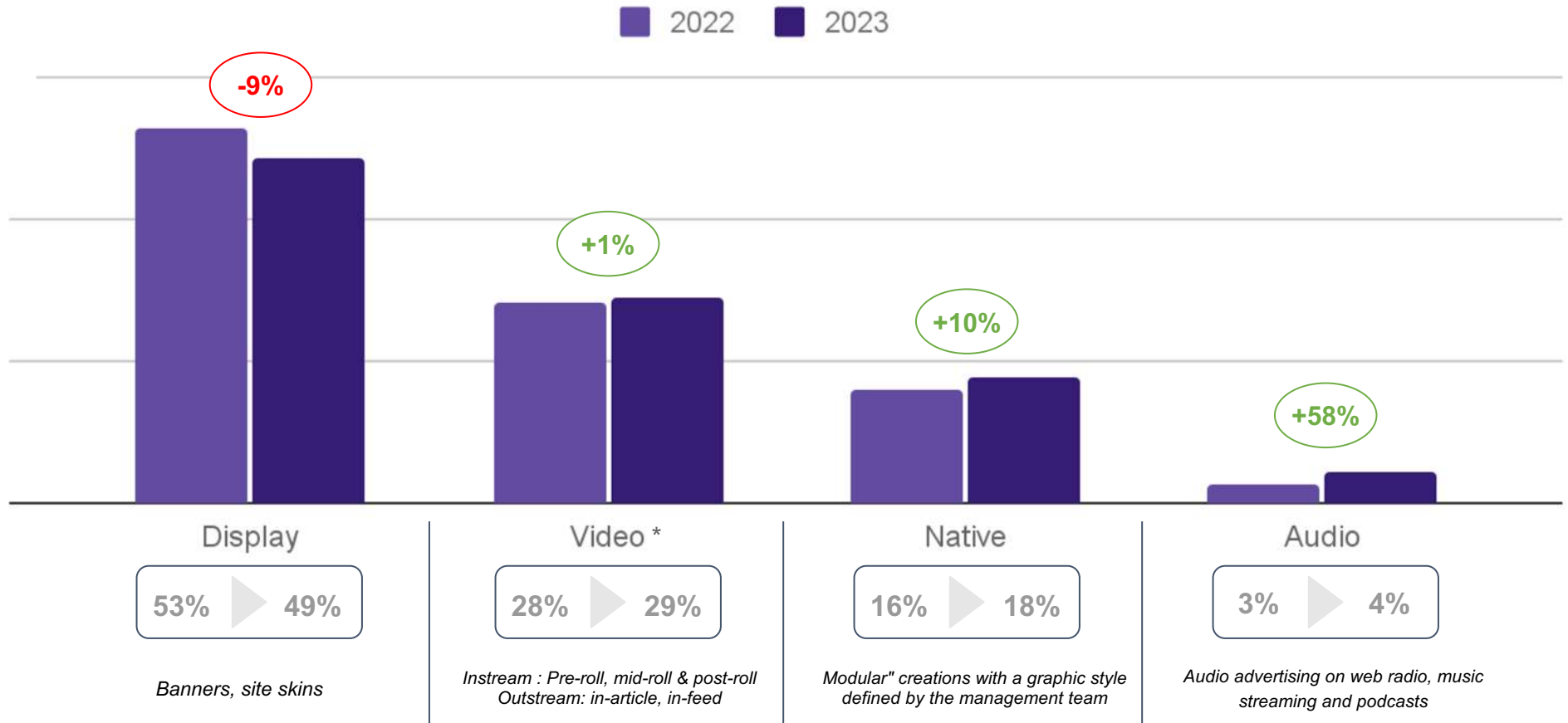
		Investments S1	CPM S1	Investments S2	CPM S2
Display		-12%	-12%	-5%	+3%
Native		+18%	+21%	+3%	-10%
Audio		+41%	+3%	+73%	+13%
Video*		-6%	-22%	+5%	-7%

* Programmatic investment excluding TV channels, YouTube, social, search and DOOH - Taboola and Outbrain not included.

Programmatic Display drops below 50% of investments in the "Barometer" perimeter

Comparison 2023 vs 2022

Investments and share of voice in the Adomik* Cohort



* Programmatic investment excluding TV channels, YouTube, social, search and DOOH - Taboola and Outbrain not included.



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2. Analysis by sector

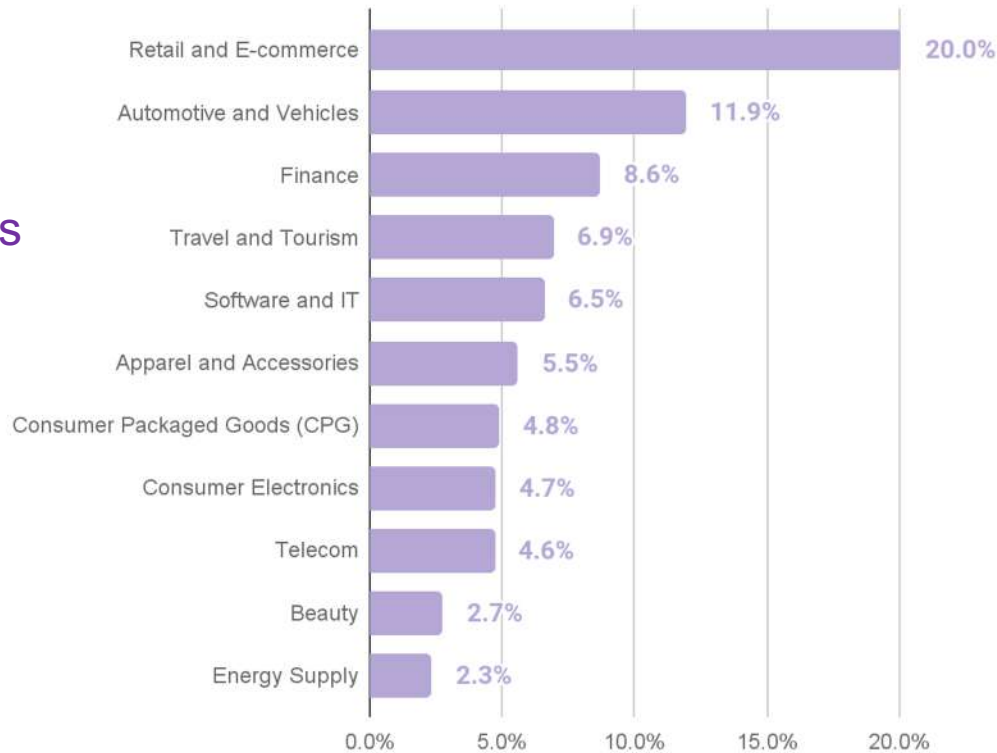
Retail (Distribution) & E-Commerce up strongly... Finance, Clothing and CPG in retreat

2023 review

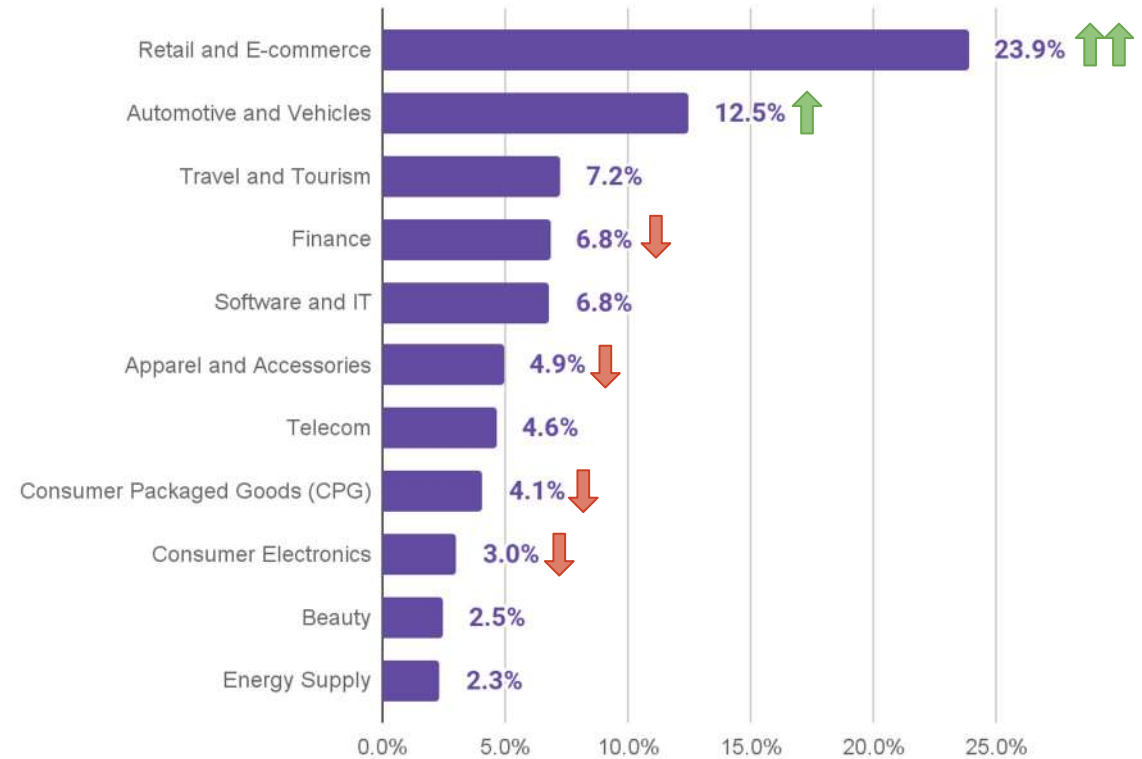
Top sectors' share of votes



Investments 2022



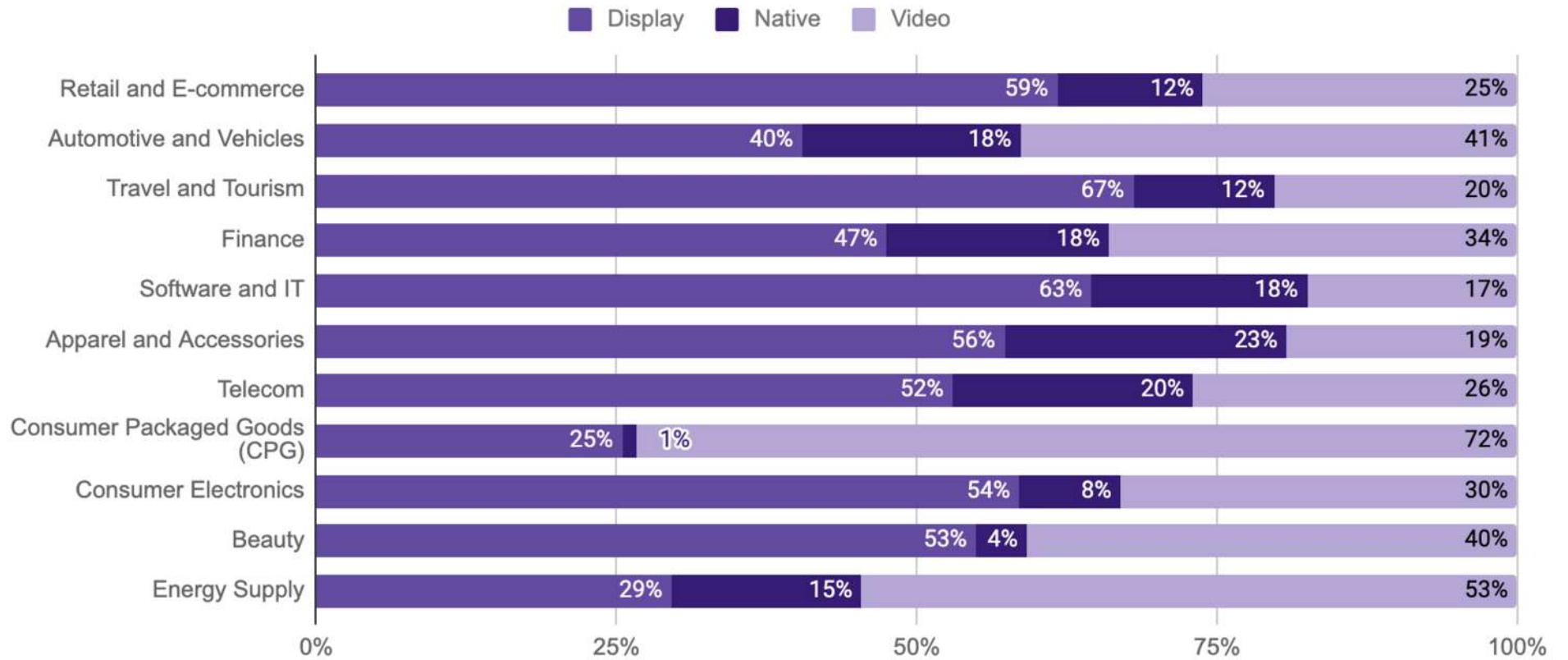
Investments 2023



CPG, Automobiles and Energy sectors overinvesting in Video, Apparel in Native

2023 review

Breakdown of share of voice by type of inventory in the top sectors



* The Audio inventory type is not included in this analysis.



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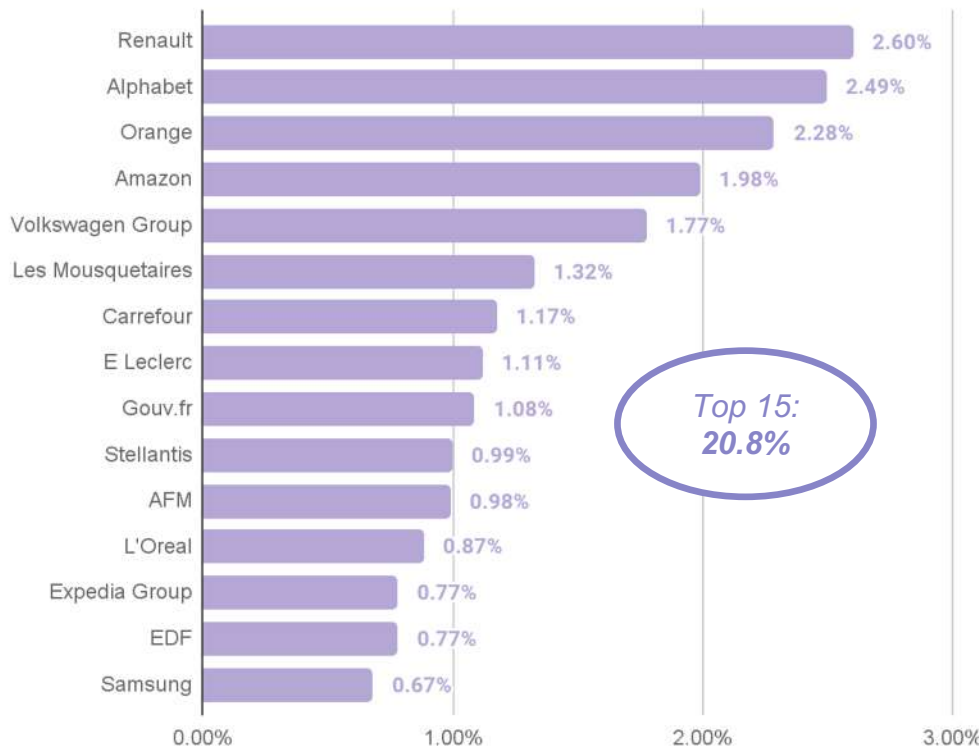
3. Analysis by advertiser

Top 15 advertisers accounting for 22% of programmatic investment

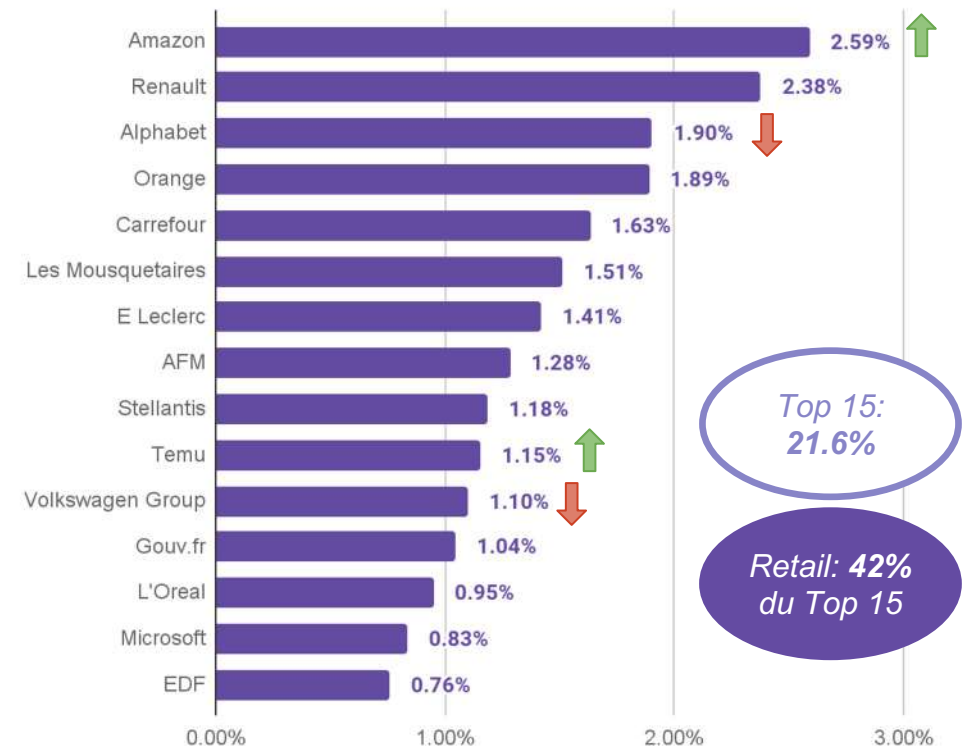
Comparison 2023 vs 2022

Top 15 advertisers*

Investments 2022



Investments 2023



*Hors AdWords, Unclassified brands and Criteo Brands

Comparison 2023 vs 2022

Temu



in 2022

#10 

in 2023

*Purchasing starts in
May*

#1 

in January 2024
*6% of programmatic
volumes*

#2 in January 24 

#2 in January 24 

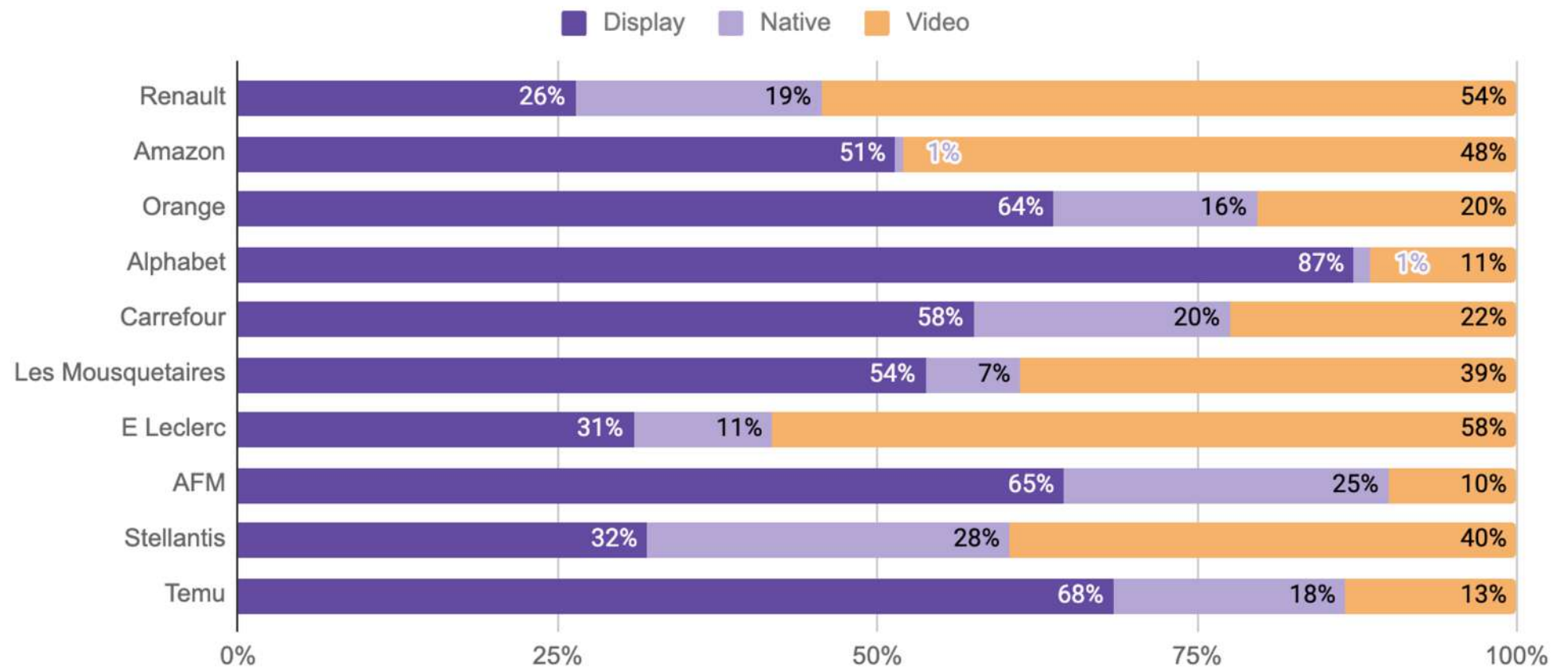
#6 in January 24 

...

Top advertisers communicating in different ways on the 3* main types of inventory

Focus 2023

Breakdown of share of voice by type of inventory in the Top 10 advertisers



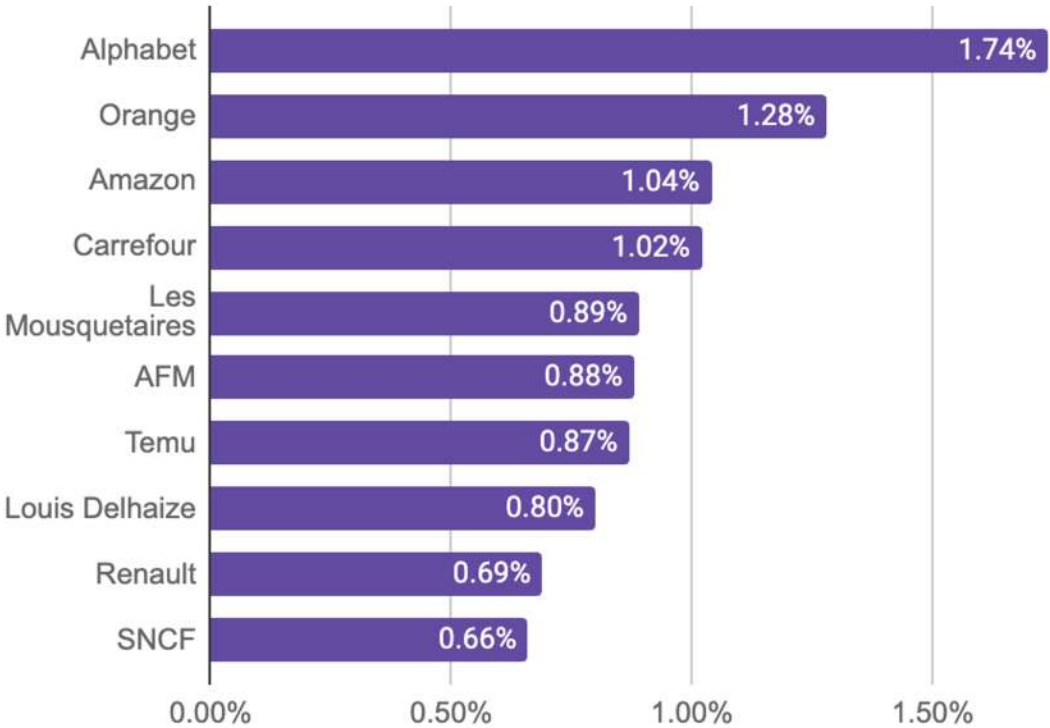
* The Audio inventory type is not included in this analysis.

Top advertisers by type of inventory*

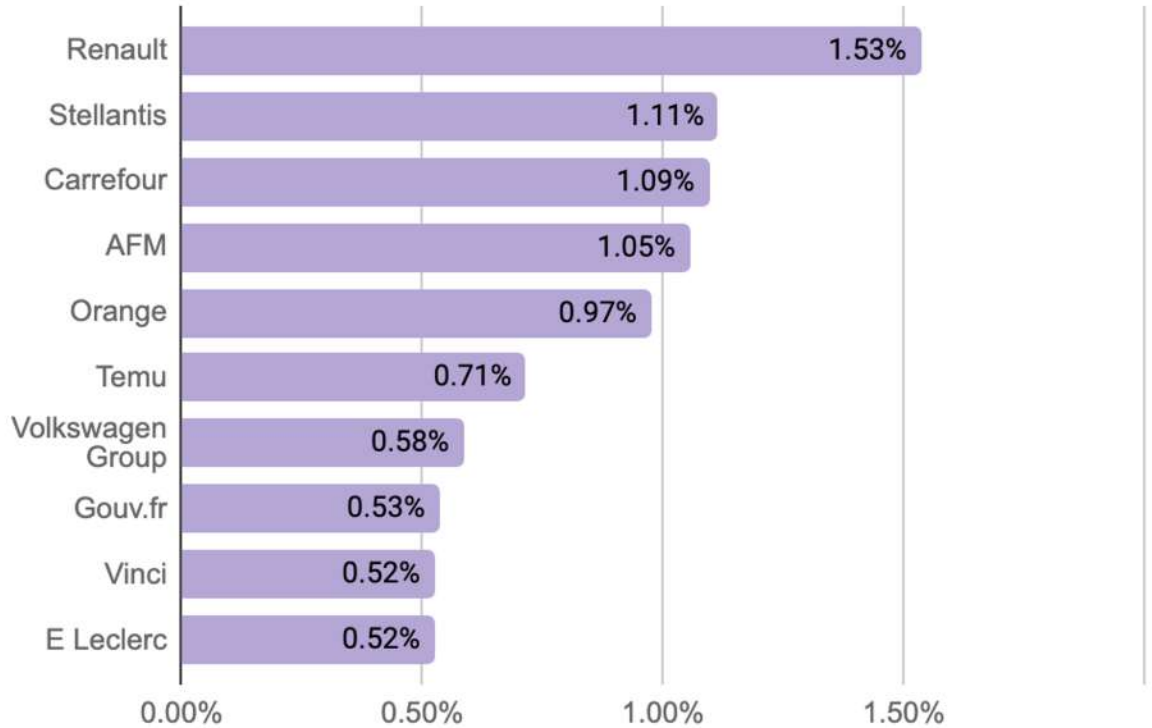
Focus 2023
 Top 10 brands by type of inventory



Display



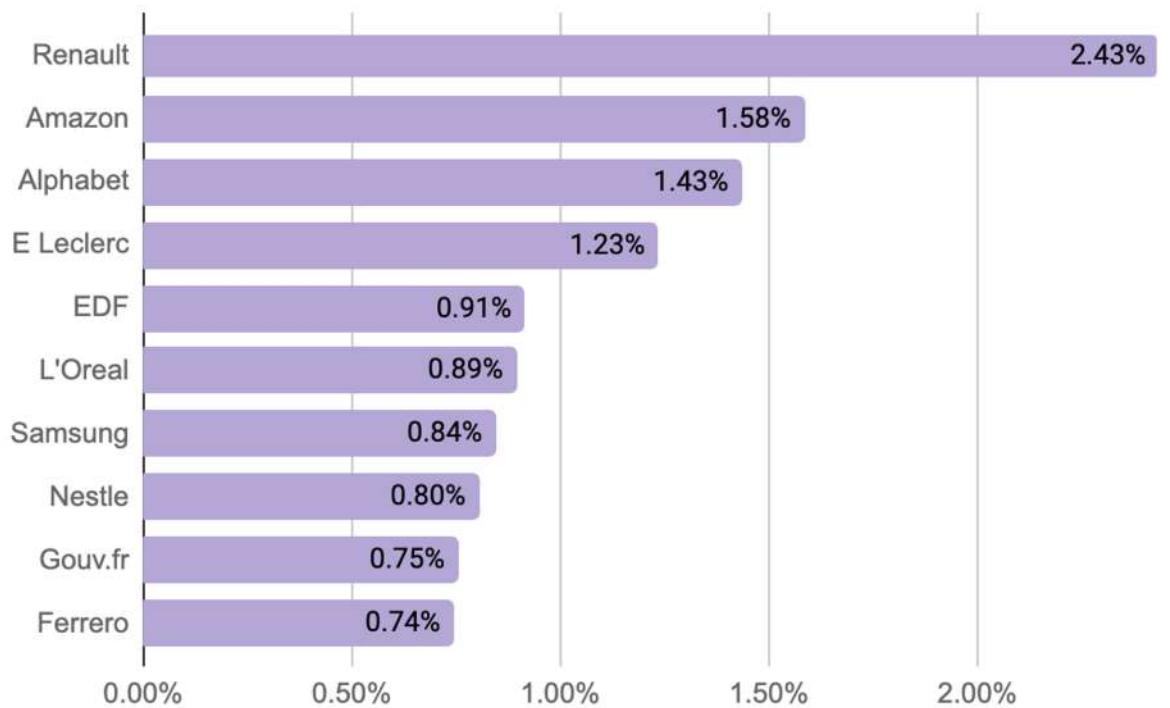
Native



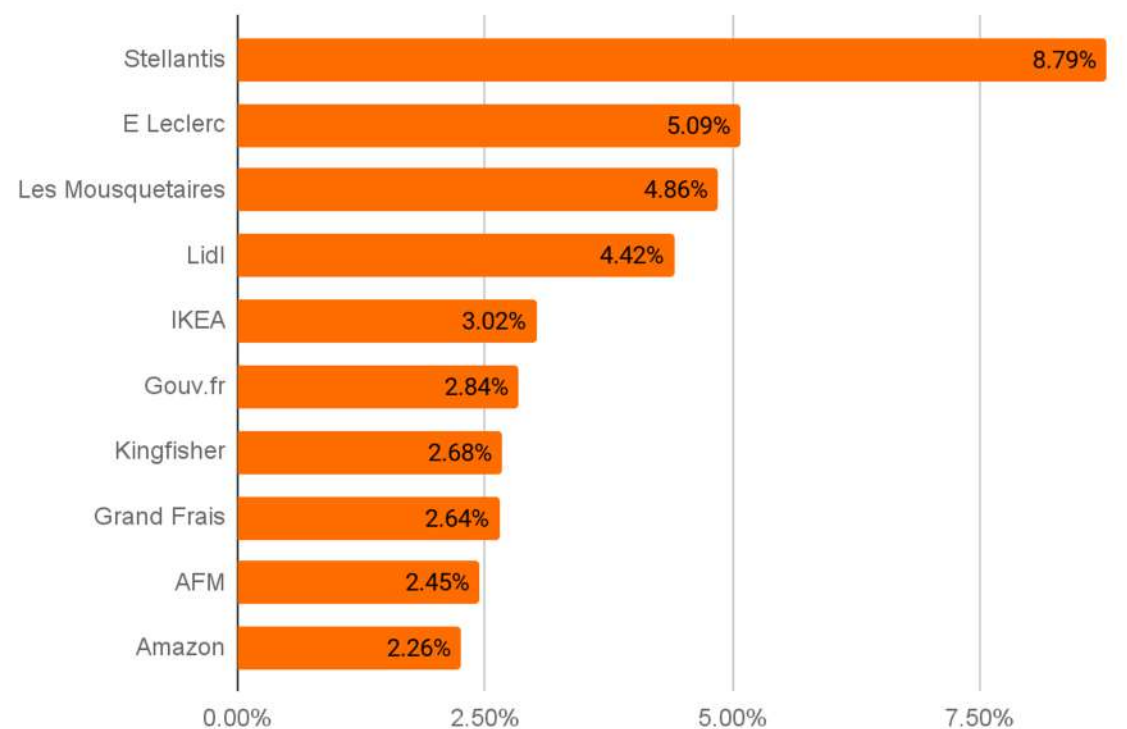
Top advertisers by type of inventory*



Video



Audio



Entry/exit balance for the top 100 advertisers

Comparison
2023 vs 2022

Major changes
among top
advertisers

New entrants 2023*

Top 50

Temu
Louis Delhaize
Shein
Vinci
Lego

Top 100

General Mills
Tata motors
Poltronesofa
Intersport
Paramount Global
Burger King
Mars

Outgoing brands in the 2022 Tops

Top 50

Samsung
Richemont
P&G
Sofinco
Airbnb
Cdiscount
Lidl

Top 100

Dell
STIHL
Mondelez
Paypal
Armani
Groupama
Bosch
Lenovo
Maisons du monde

* Advertisers entering or leaving the Top 100 in 2023 with significant growth/decrease in investment



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4. Analysis by DSP

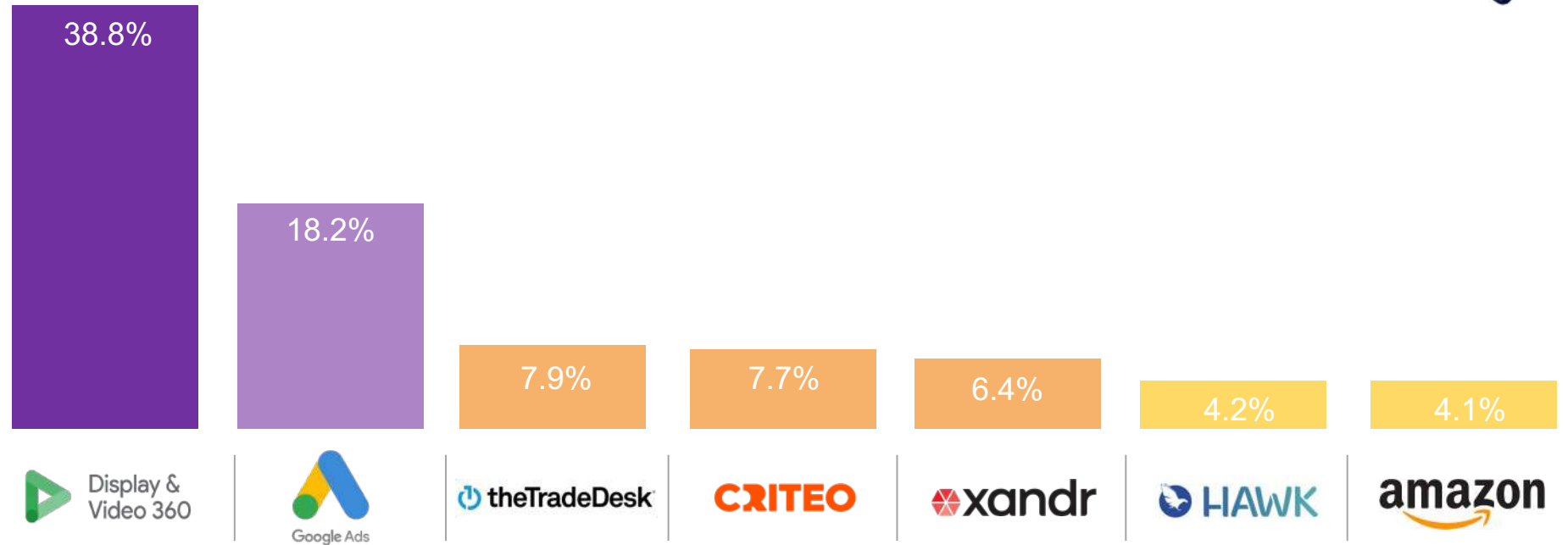
7 major players in the market



2023

Top 7 DSPs

Share of
investments* (%)



* Programmatic investment excluding YouTube, social, search, TV channels and DOOH - Taboola not included / Outbrain included

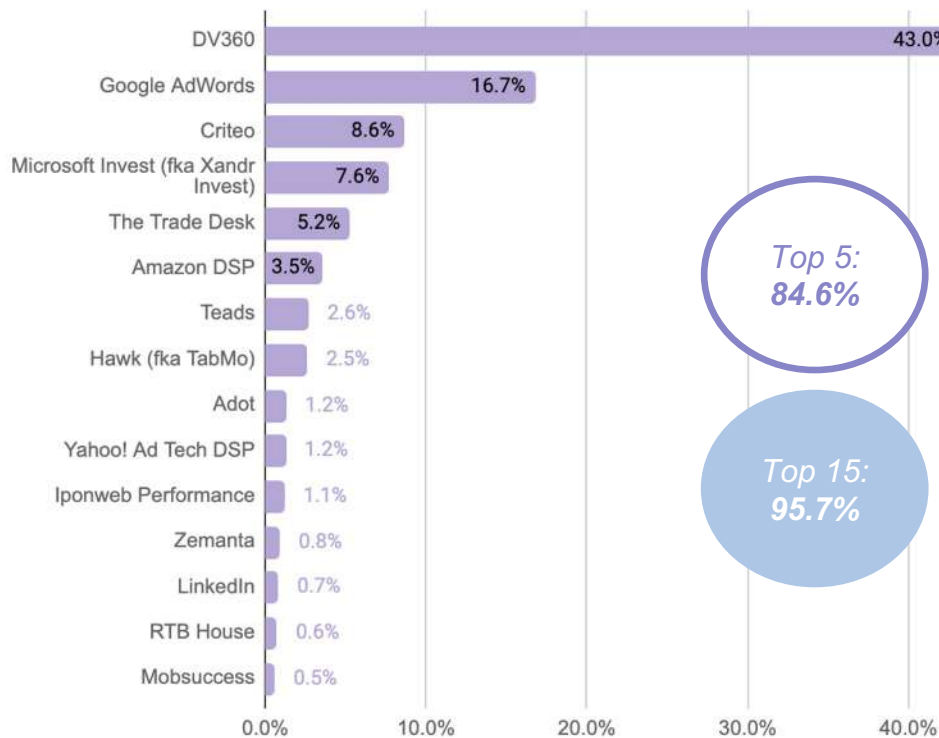
The evolving DSP market

Comparison 2023 vs 2022

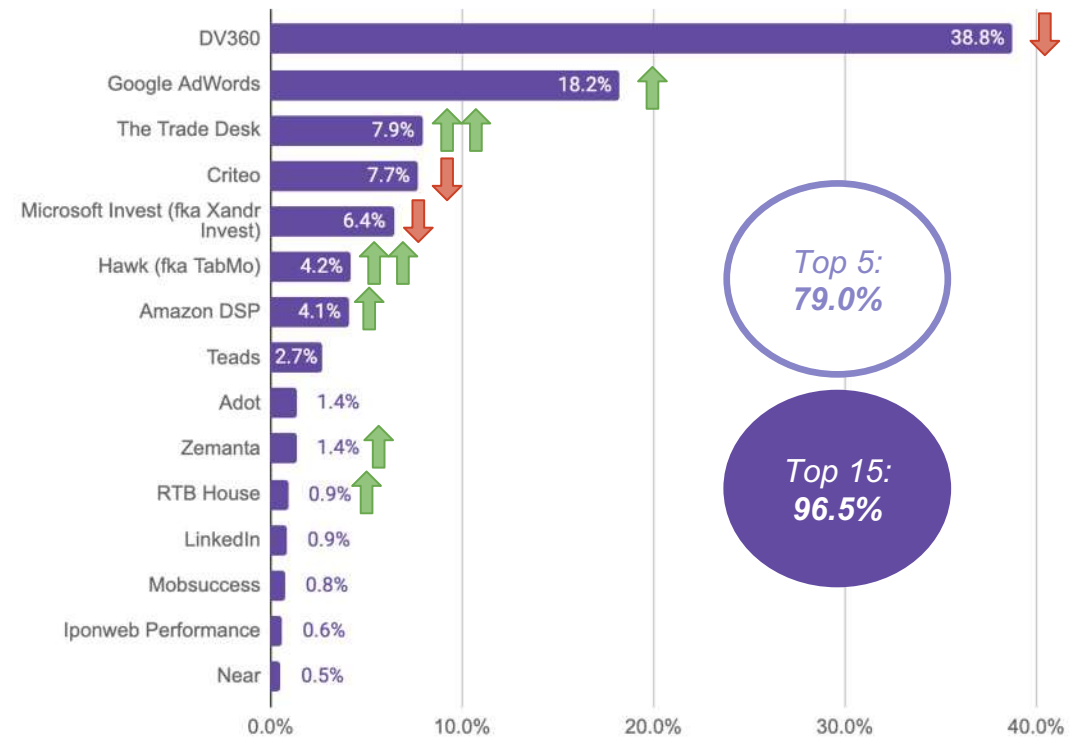
Top 15 DSP*



Investments 2022



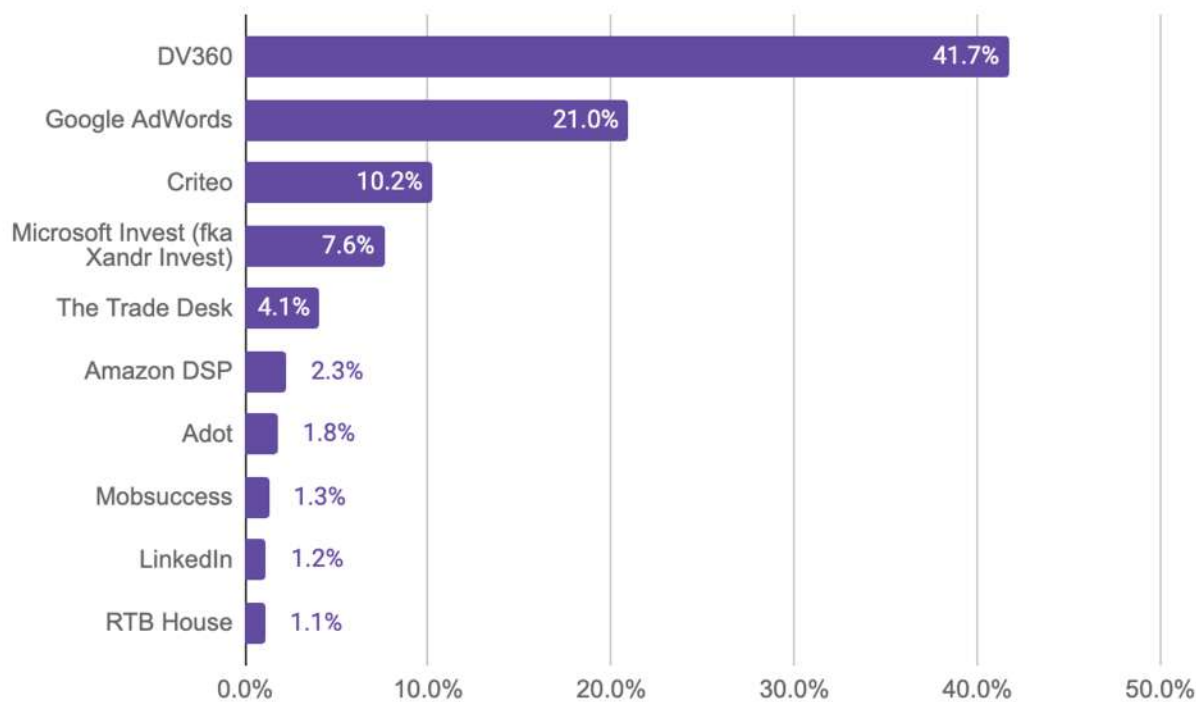
Investments 2023



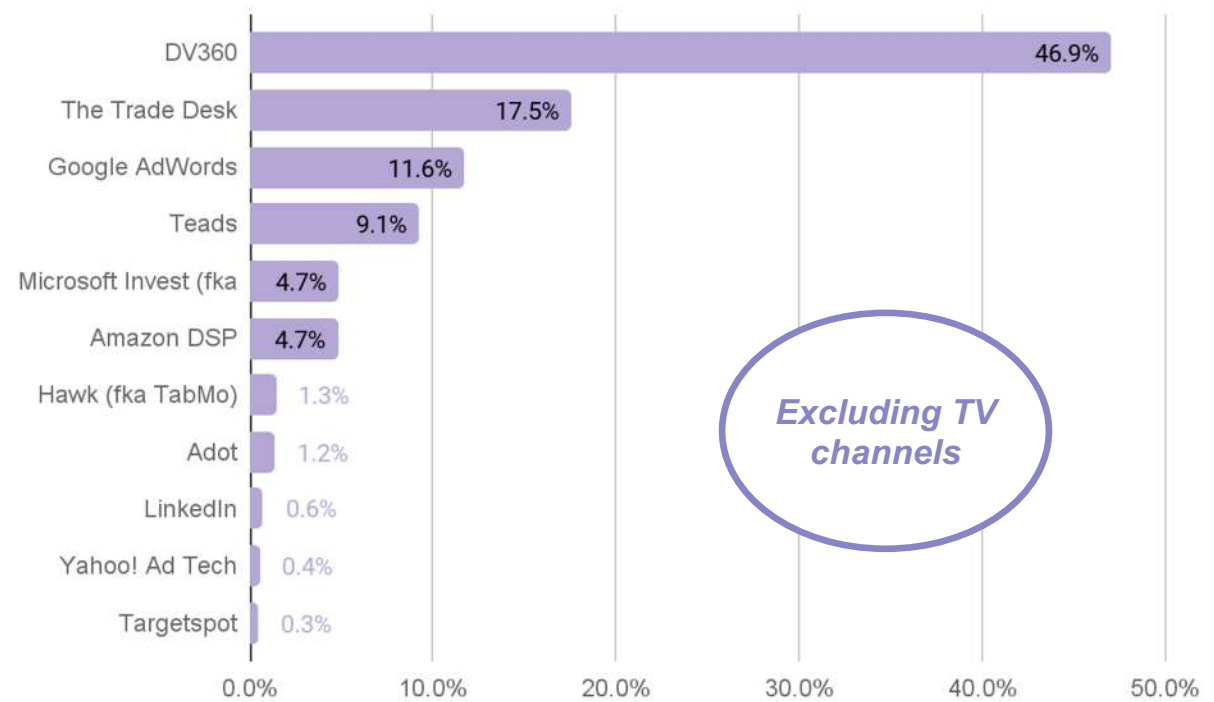
* Programmatic investment excluding YouTube, social, search, TV channels and DOOH - Taboola and Outbrain not included.

Top DSPs by type of inventory (1/2)

Display

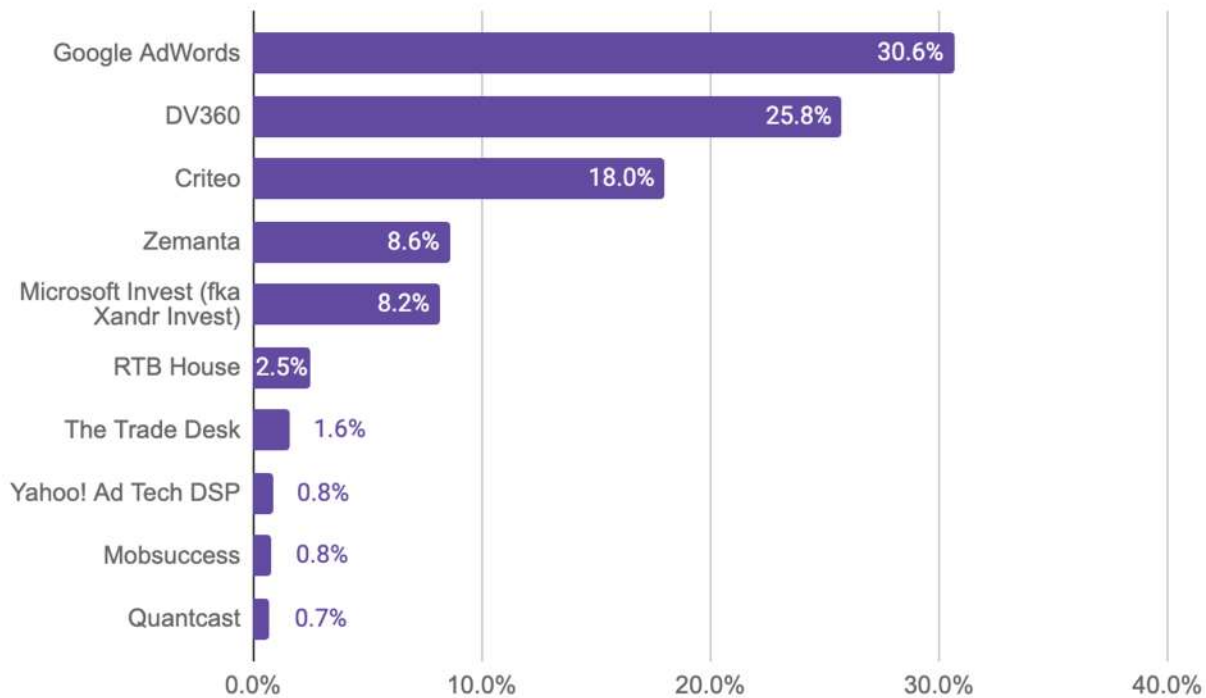


Video

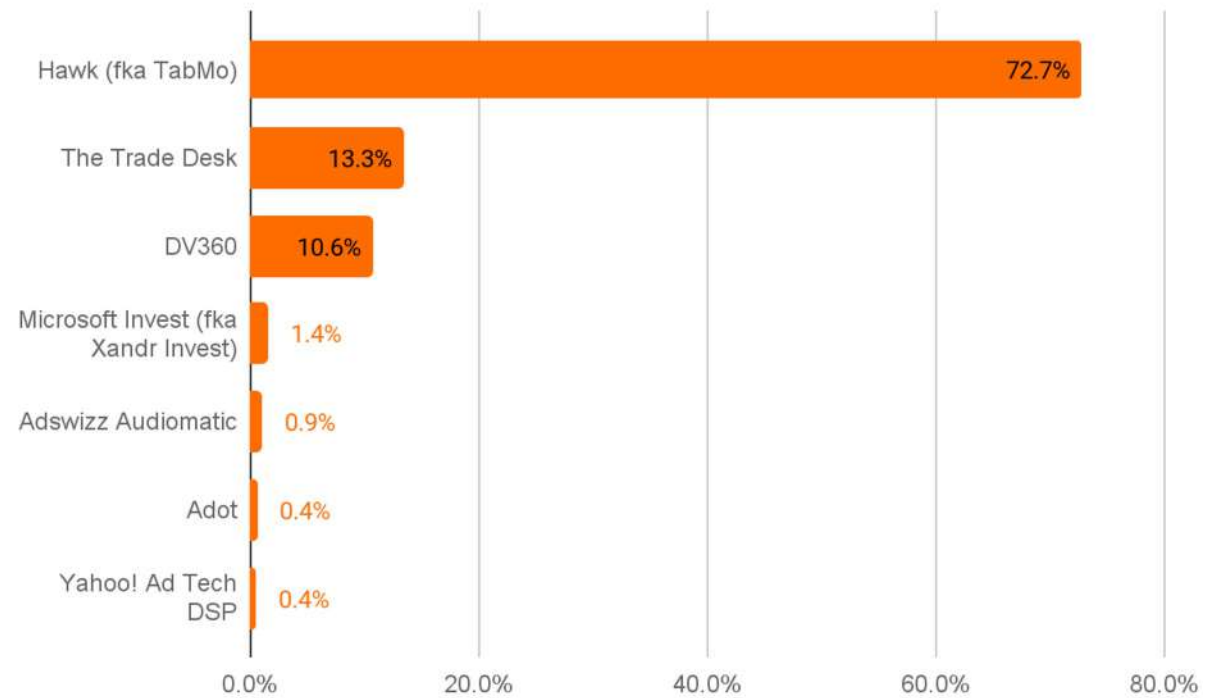


Top DSPs by type of inventory (2/2)

Native



Audio





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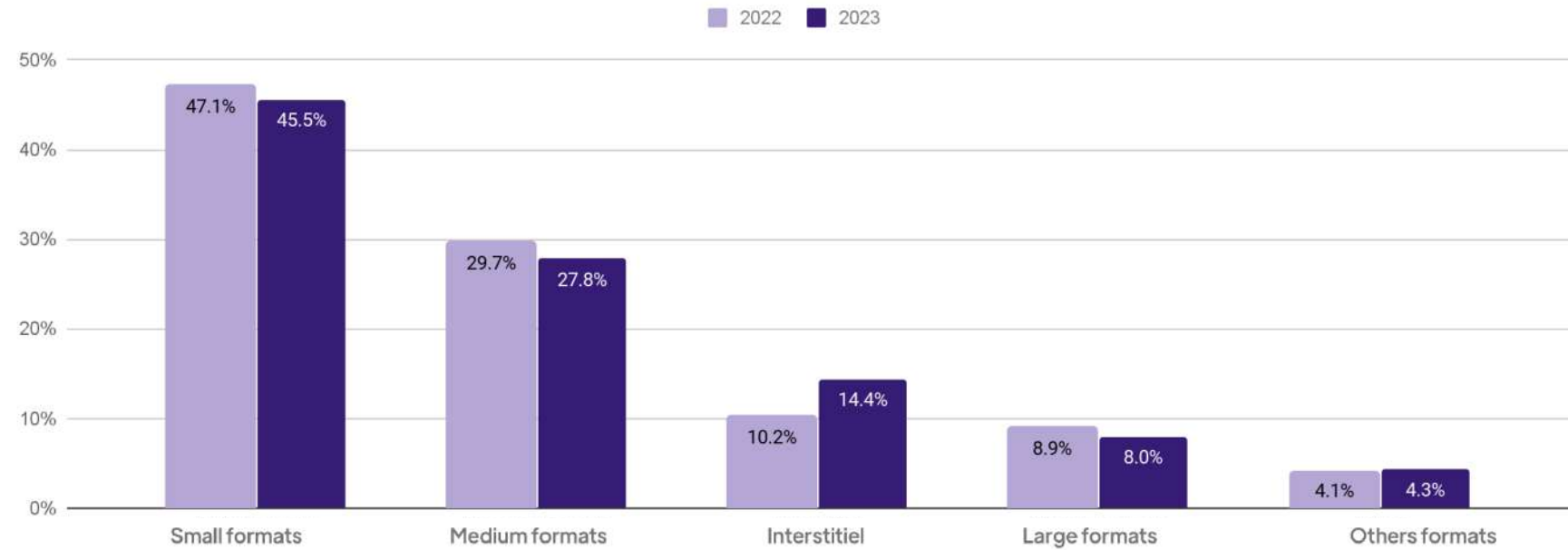
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5. Analysis by format

Display still dominated by Small and Medium formats... but losing ground to Interstitials

Focus Display 2023

Investments by IAB format



Small formats: 728x90 Megabanner, 300x250 Pavé, 120x600 Skyscraper, 160x600 Megaskyscraper, Mobile Banners, Footer and similar sizes

Medium formats: Wide Angle 300x600, GigaBanner 1000x90 and similar sizes

Large formats: Billboard 970x250, Masthead 1000x300, Cladding 1800x1000 and similar sizes

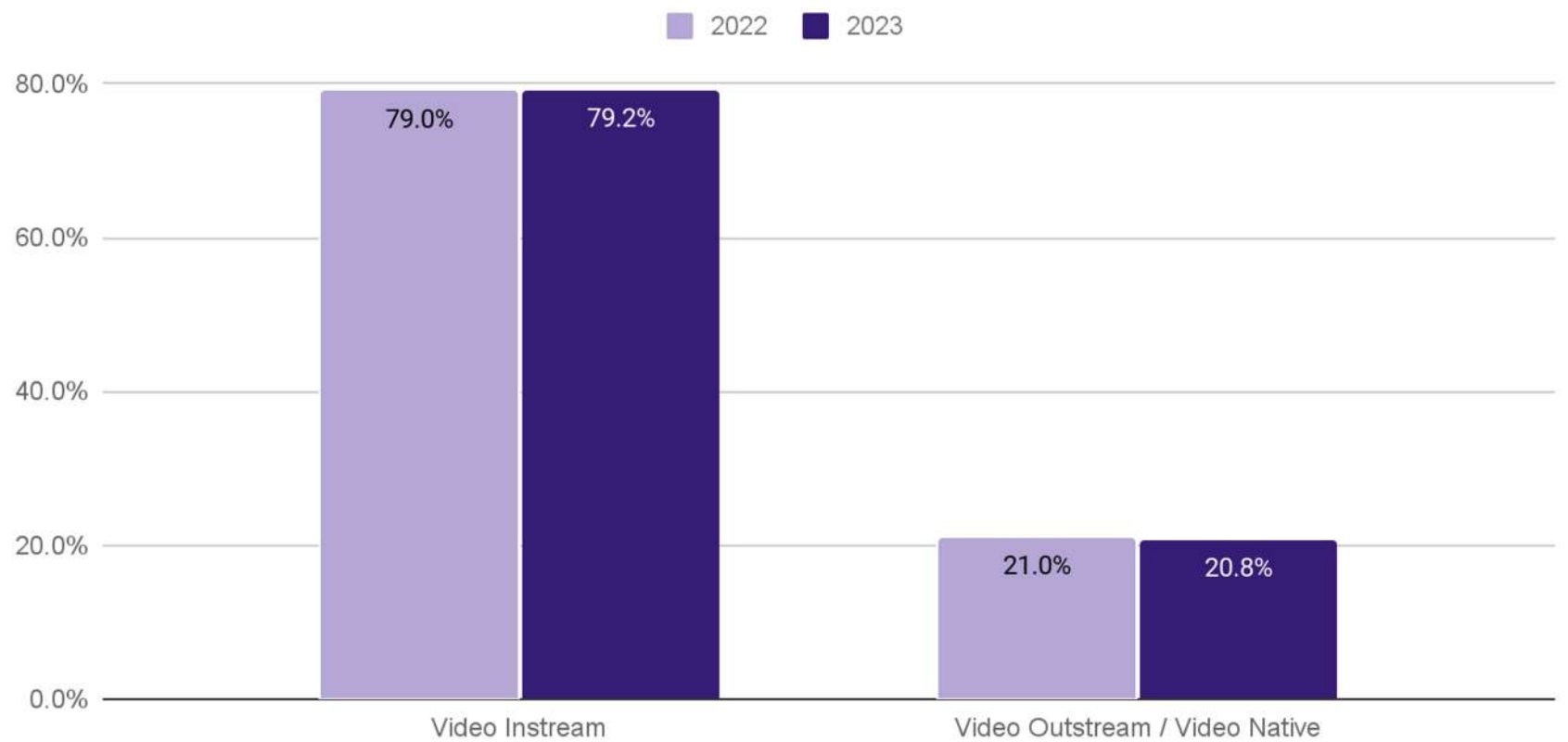
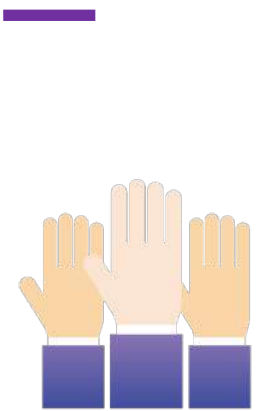
Interstitial: Mobile Interstitiels et Web Interstitiels

Other formats : Any other format that can be marketed

Video Instream and Outstream break even

Focus Video 2023

Investments by IAB format





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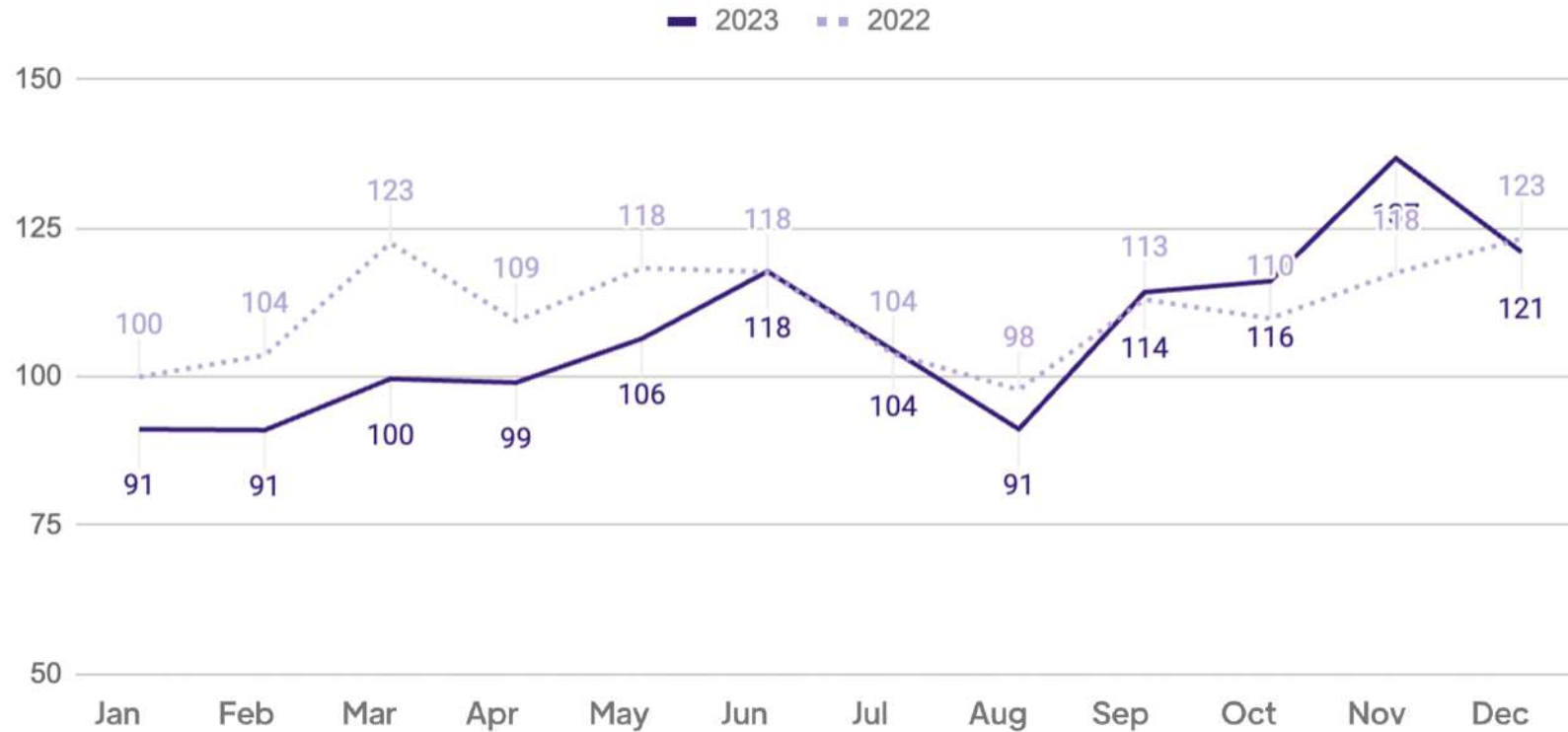
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6. CPM analysis

Display CPMs down...

Comparison 2023 vs 2022

CPM* growth per month Display



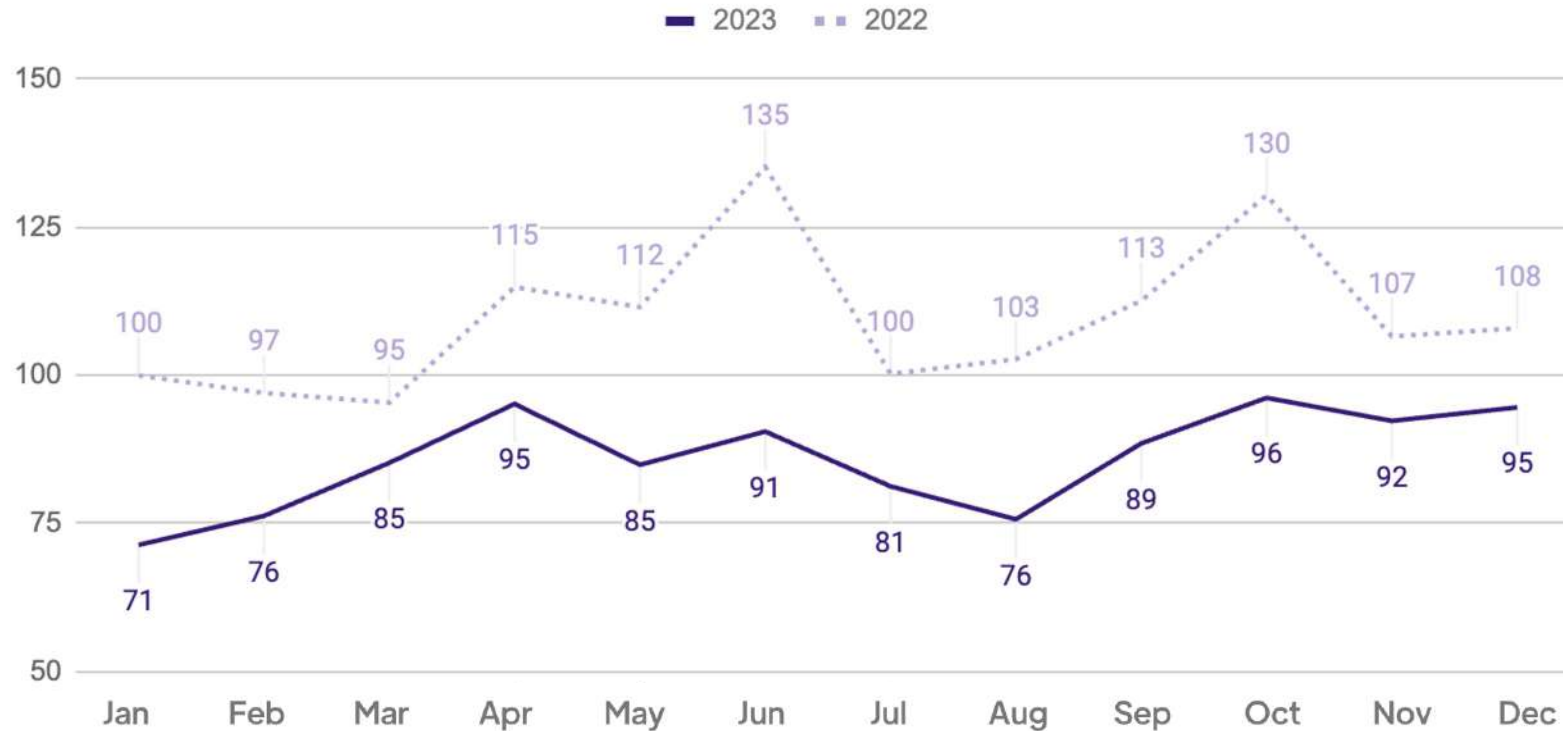
-3.6%
between 2022
and 2023

* CPM net publisher, excluding SSP/DSP and Data costs and excluding consultancy or intermediary fees

A sharp fall in CPMs for Video outstream

Comparison 2023 vs 2022

CPM* growth per month Video Outstream



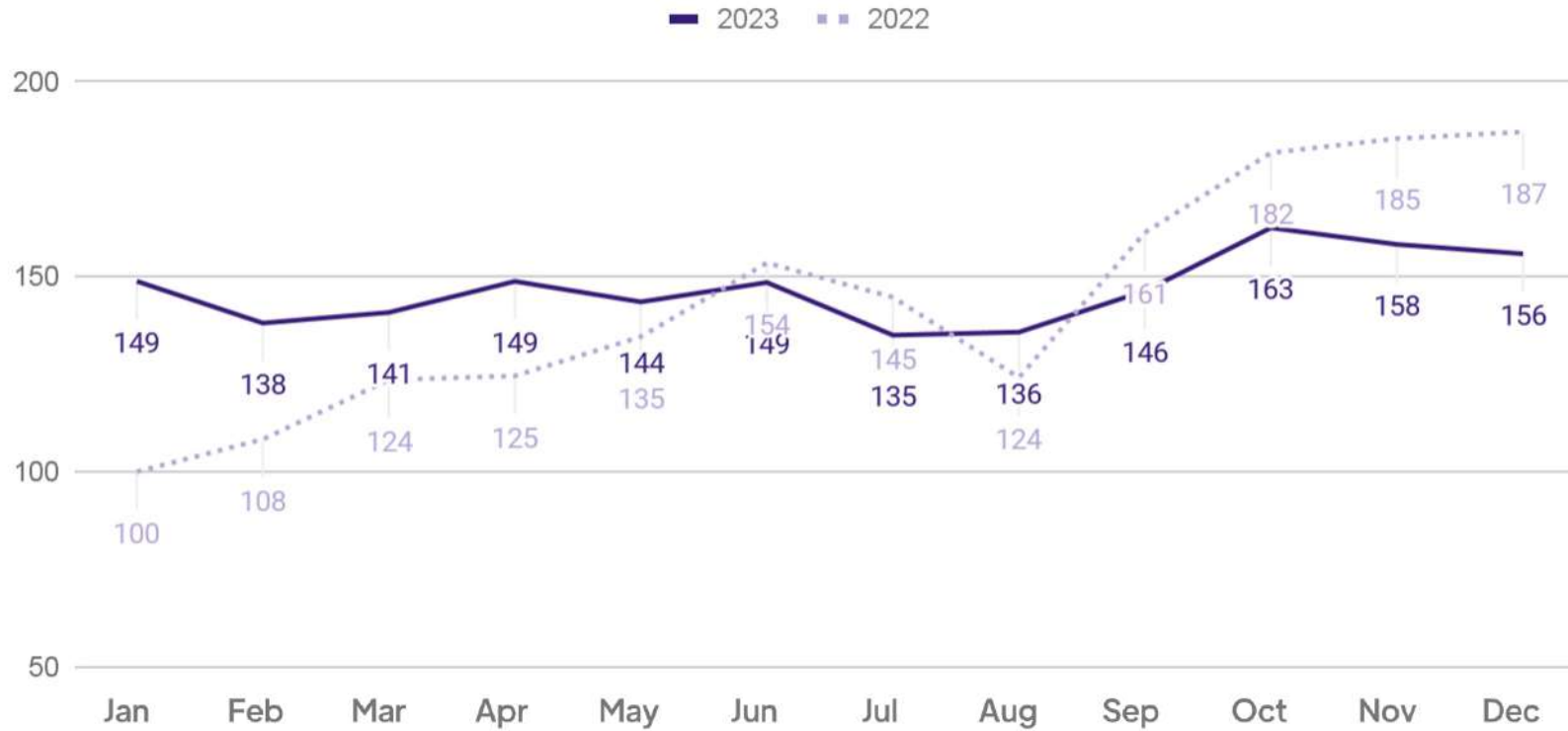
-20.8%
between 2022 and 2023

* CPM net publisher, excluding SSP/DSP and Data costs and excluding consultancy or intermediary fees

Native CPMs up slightly

Comparison 2023 vs 2022

CPM* growth per month Native



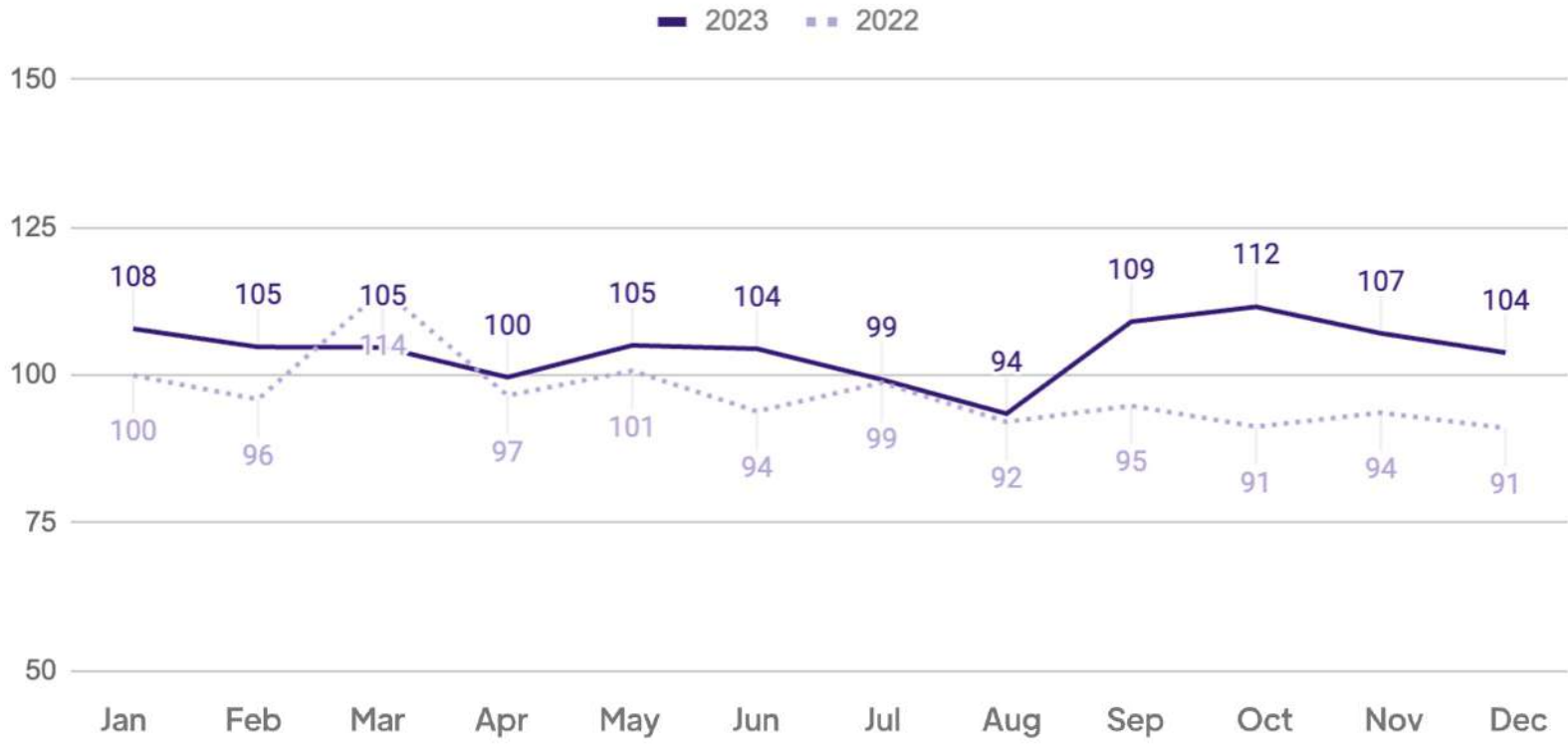
+3.5% e
between 2022 and 2023

* CPM net publisher, excluding SSP/DSP and Data costs and excluding consultancy or intermediary fees

Audio CPMs up (relative to volume growth)

Comparison 2023 vs 2022

CPM* growth per month Audio



+8.3%
between 2022 and 2023

* CPM net publisher, excluding SSP/DSP and Data costs and excluding consultancy or intermediary fees



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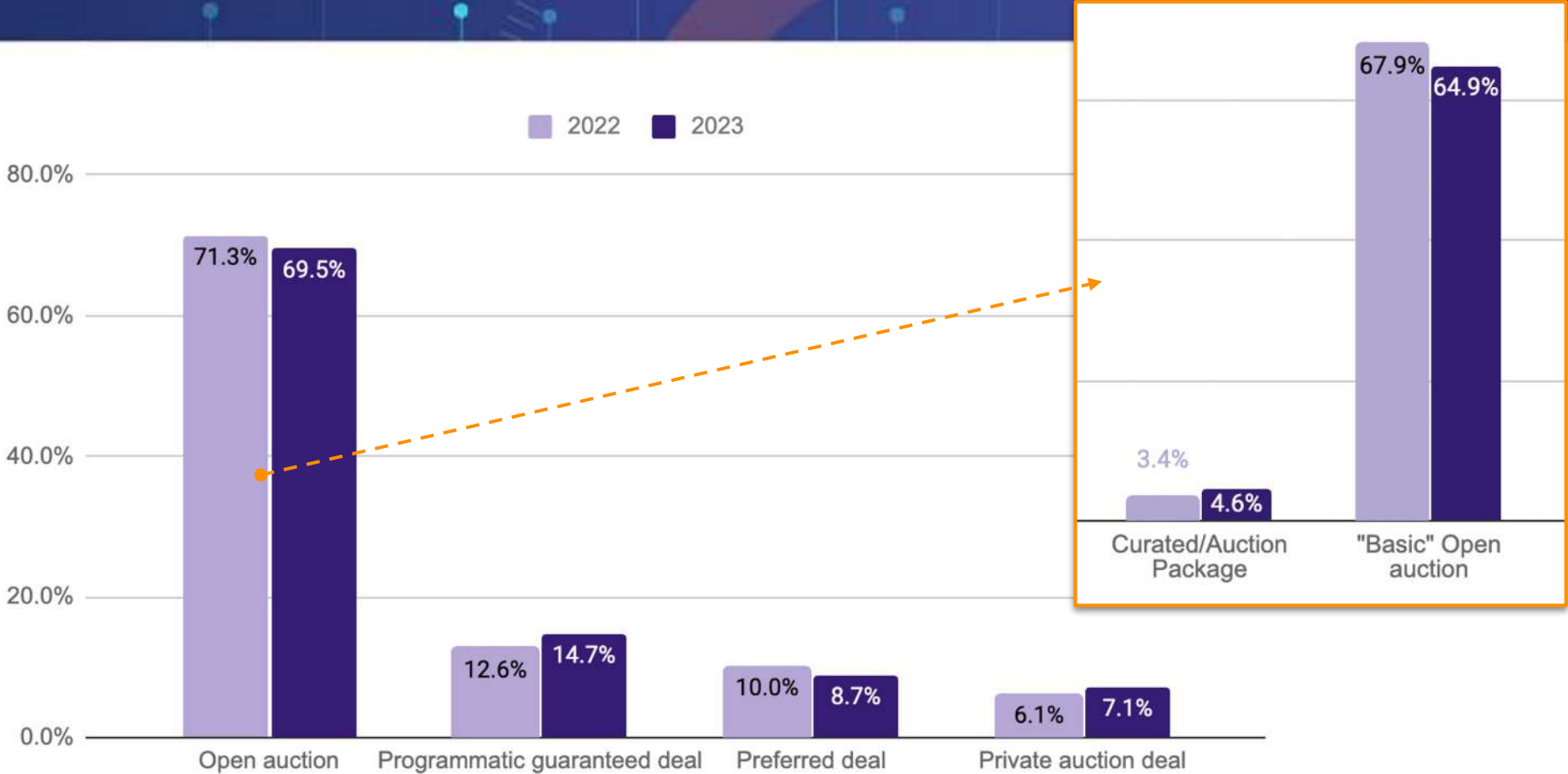
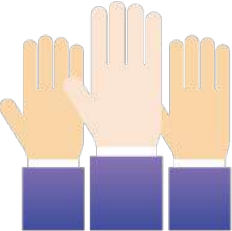
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7. Analysis by deal type

Open Auction down despite curation, Guaranteed Programmatic Advertising continues to grow

Comparison 2023 vs 2022

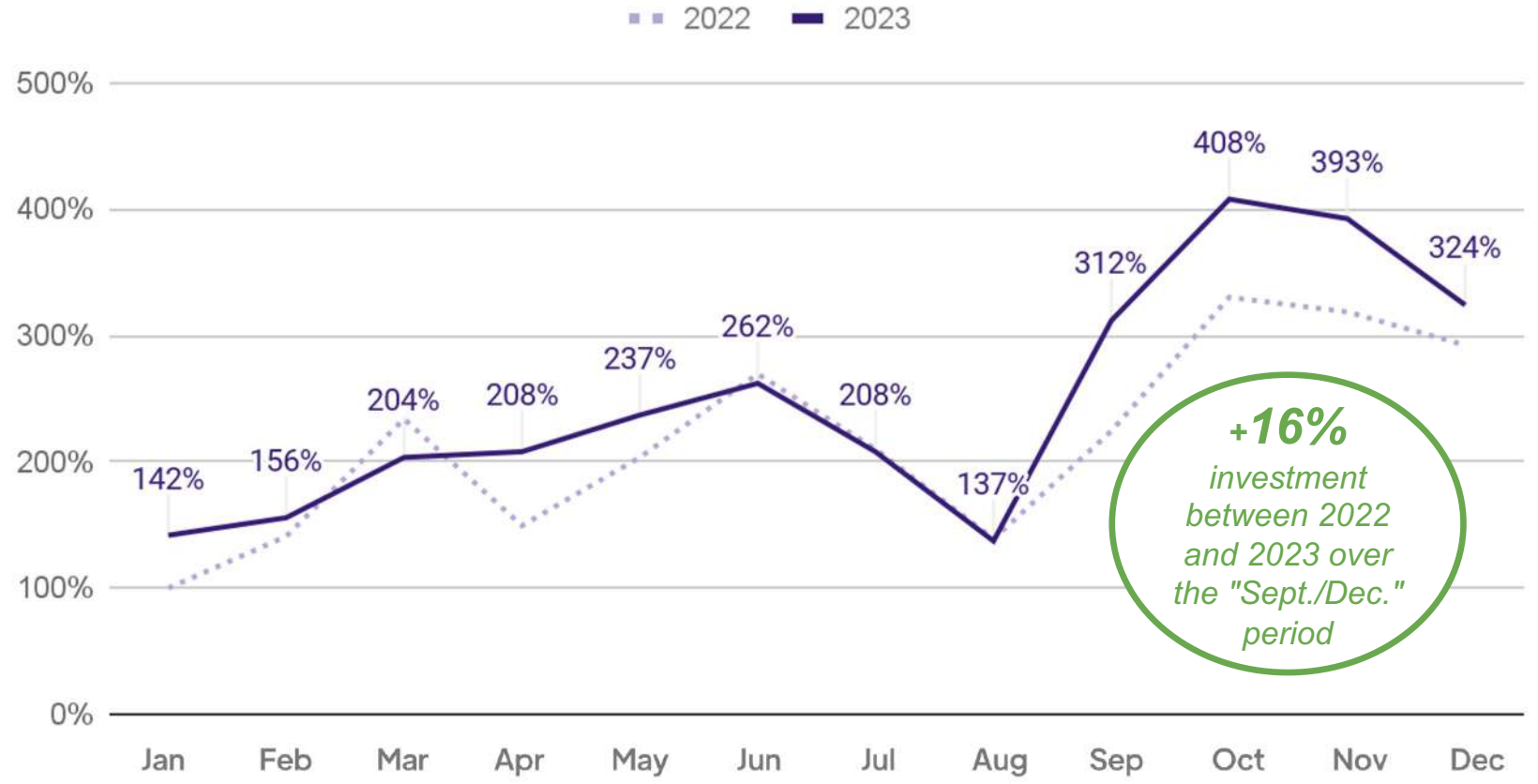
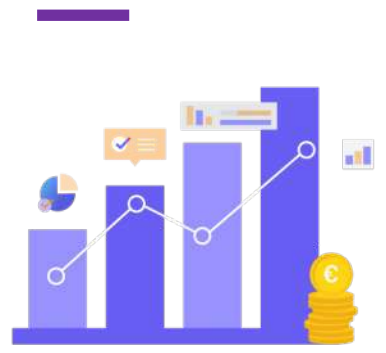
Investments by deal type



Guaranteed Programmatic Advertising continues to grow with a strong Q4

January 2022 Evolution since

PG share of vote by month



+16%
investment
between 2022
and 2023 over
the "Sept./Dec."
period

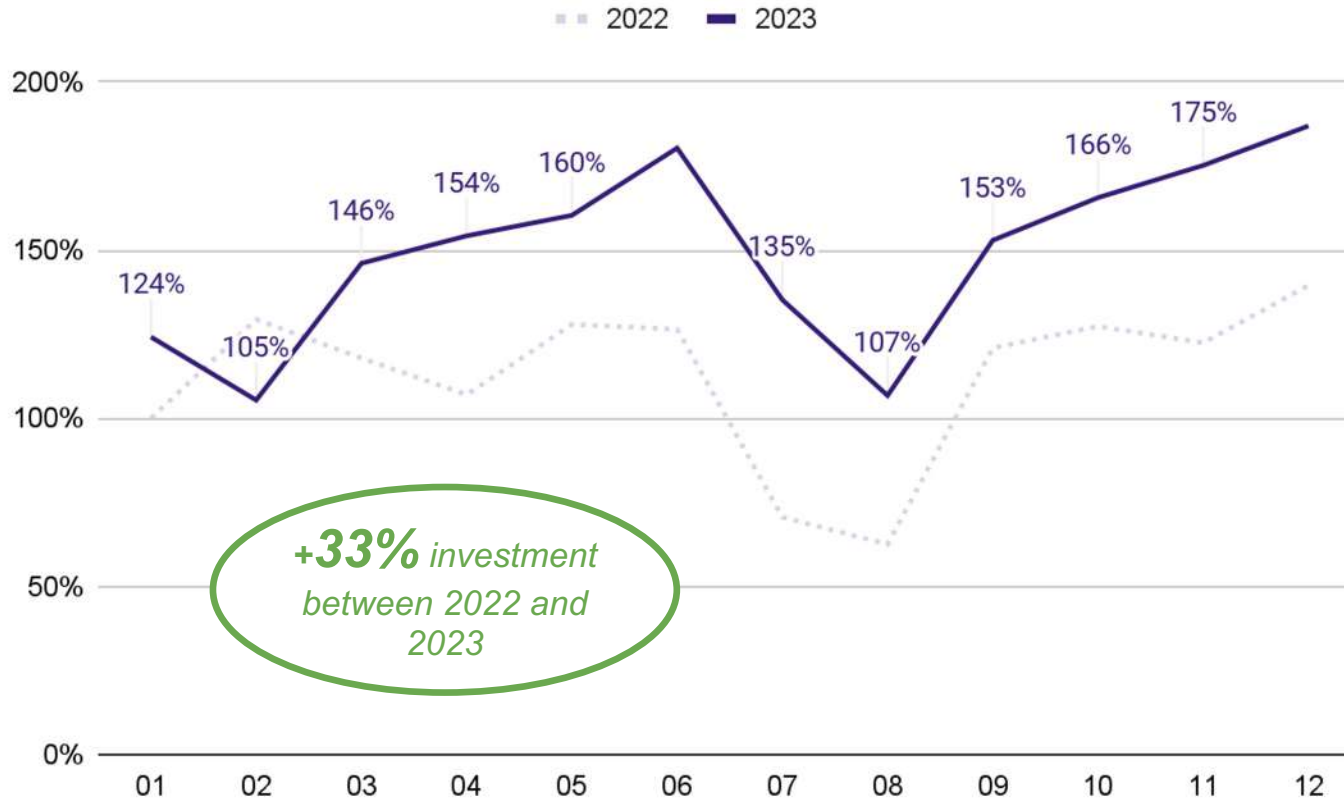
Focus Curated Marketplaces: Further increase in investment in Curated Marketplaces

Evolution from 2022 to 2023

Share of investment in Curated Marketplaces* (%)

Definition:

Multi-publisher deals pushed to one or more **buyers**, created without the intervention of the **publisher**, at the initiative of:- the **SSP**- a **third-party curator**.



8 SSPs identified as active in 2023:

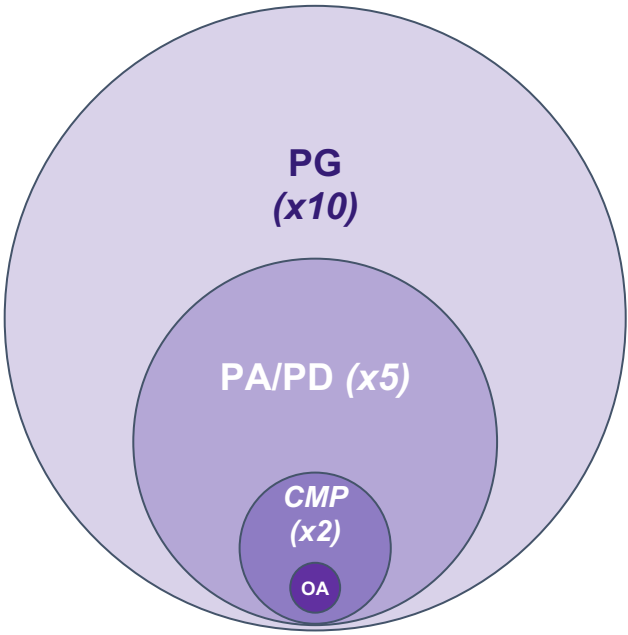
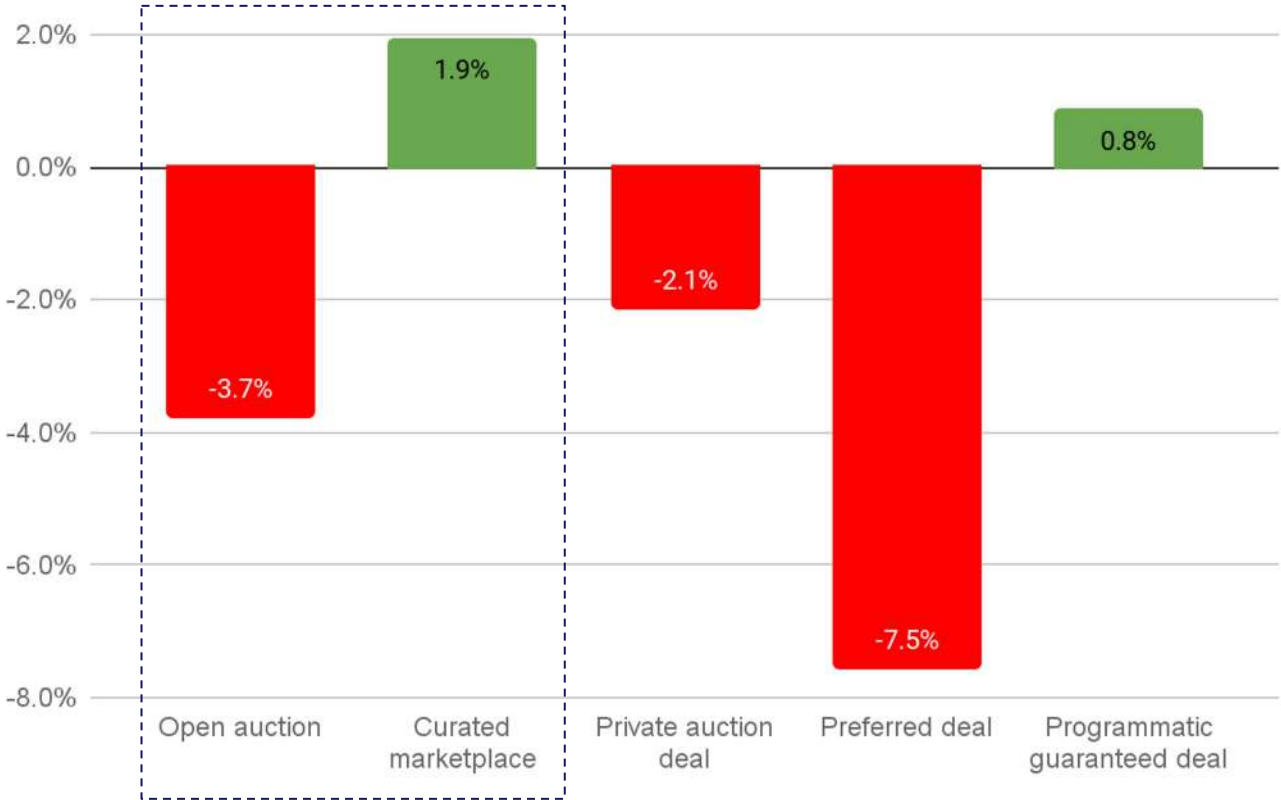
- amazon
- EQUATIV
- improve digital
- Index¹ Exchange
- Magnite
- OpenX
- PubMatic
- xandr

* Study carried out on a cohort of 11 French public utilities.

CPMs for Guaranteed Programmatic and Curated Marketplaces resist the downturn

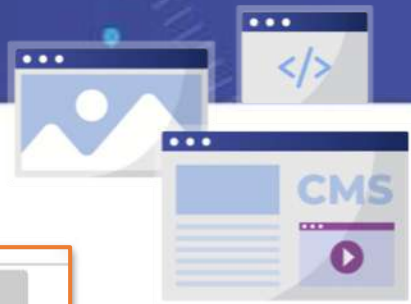
Evolution 2023 vs 2022

Evolution CPM par type de deal



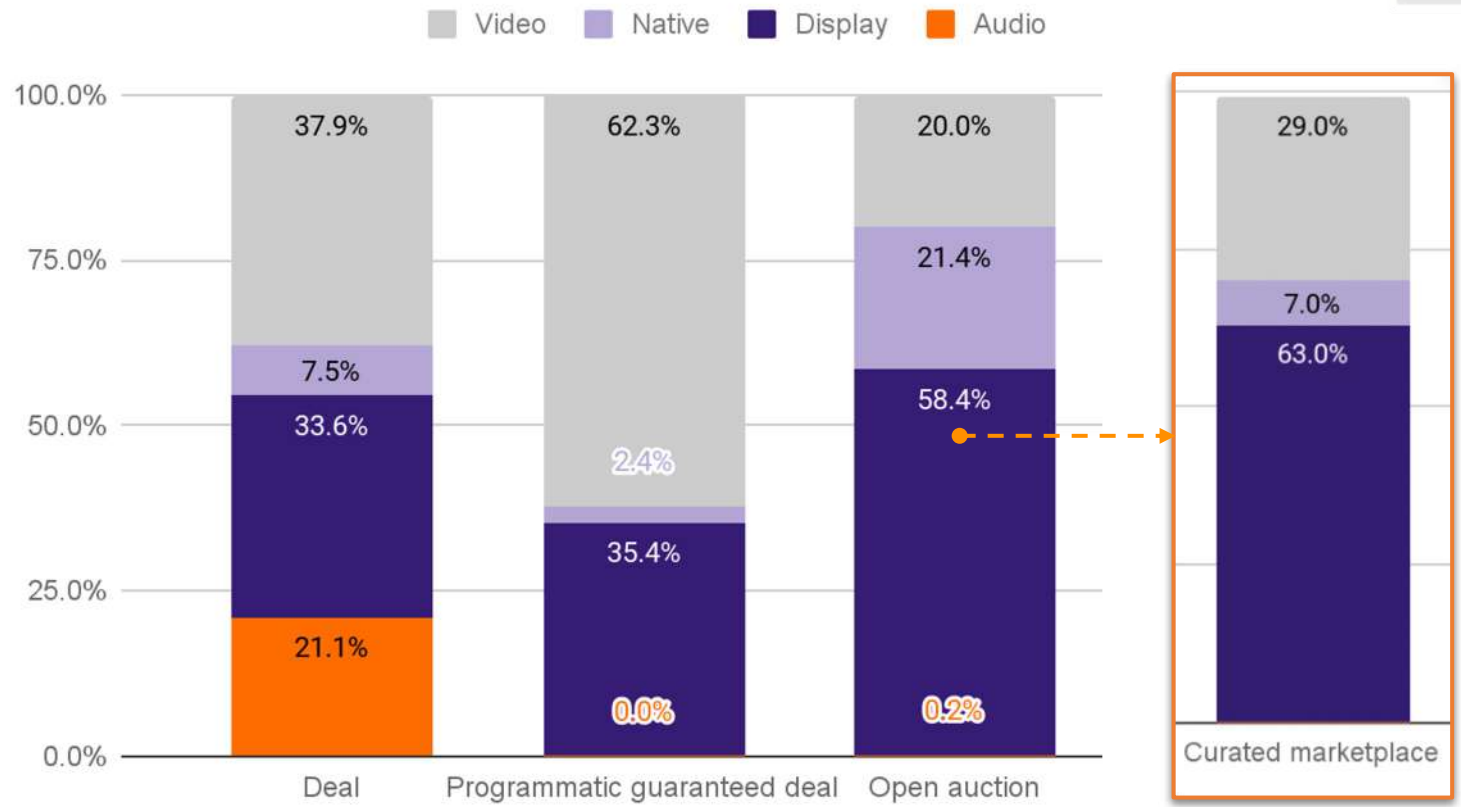
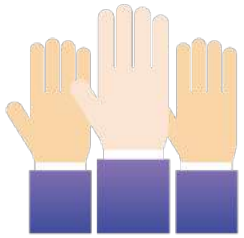
Relative value of Deal CPMs compared with Open Auctions

Guaranteed Programmatic investments dominate Video, Deals very evenly balanced



Focus 2023

Deal type by inventory type

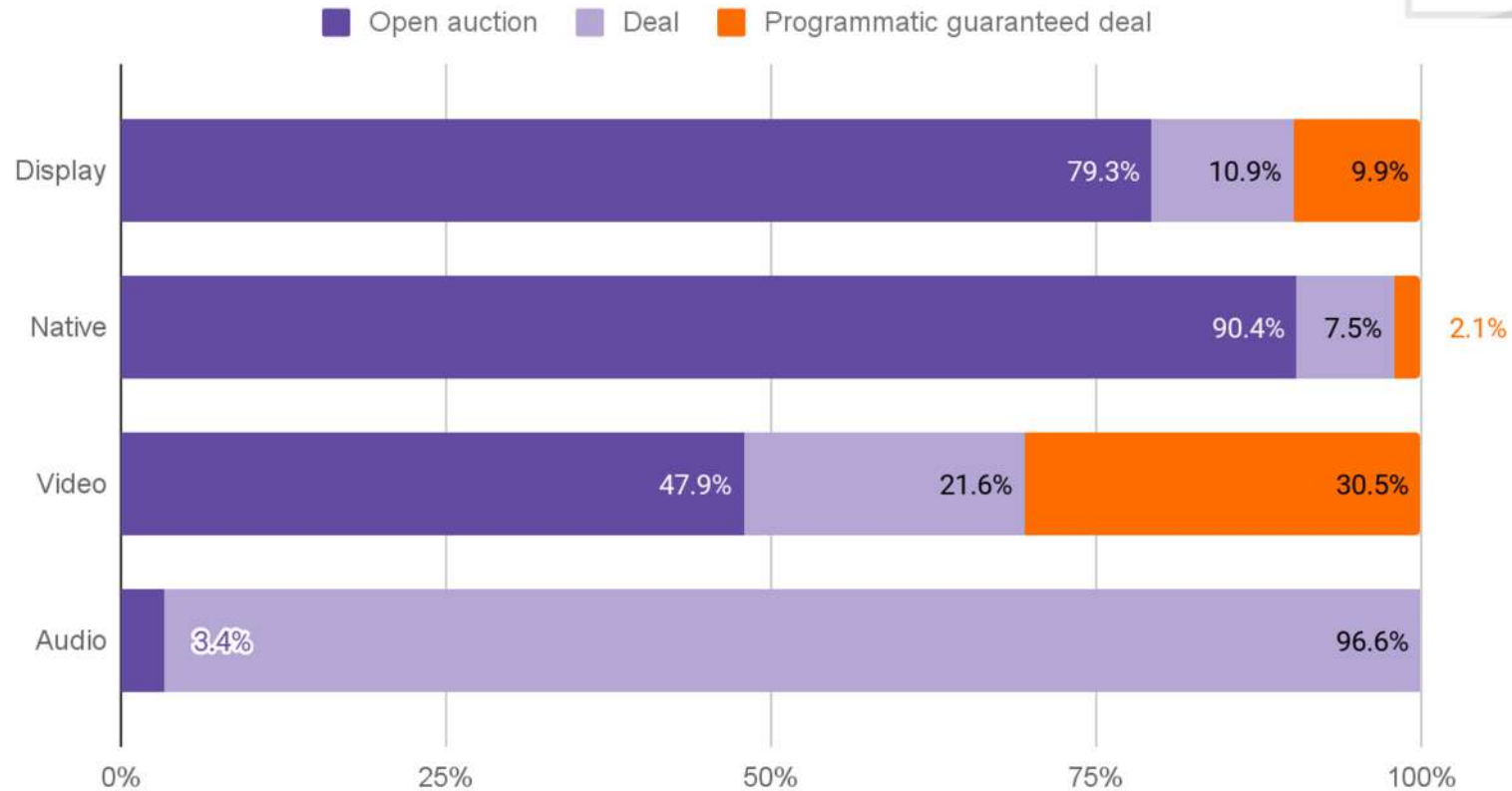
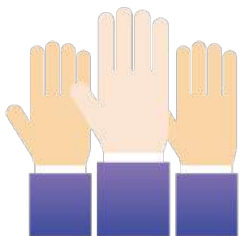


* Le type de deal "Deal" cumule les Private auction et Preferred deals

Display and Native largely sold in Open Auctions... Audio almost exclusively in Deals

Focus 2023

Type of inventory by type of deal

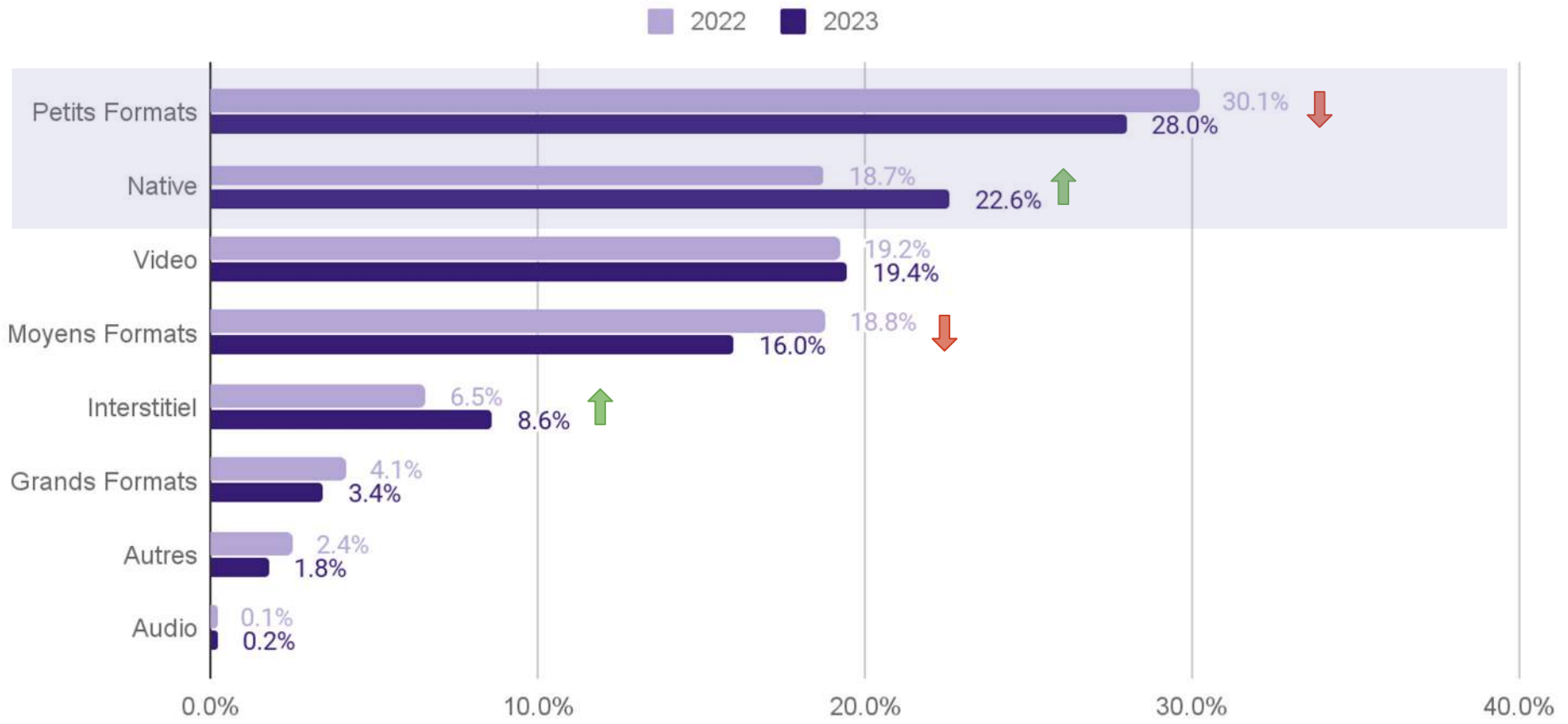


* Le type de deal "Deal" cumule les Private auction et Preferred deals

Focus Open Auction: Open auction still dominated by Small Formats, but declining in 2023 in favour of Native and Interstitials

Comparison 2023 vs 2022

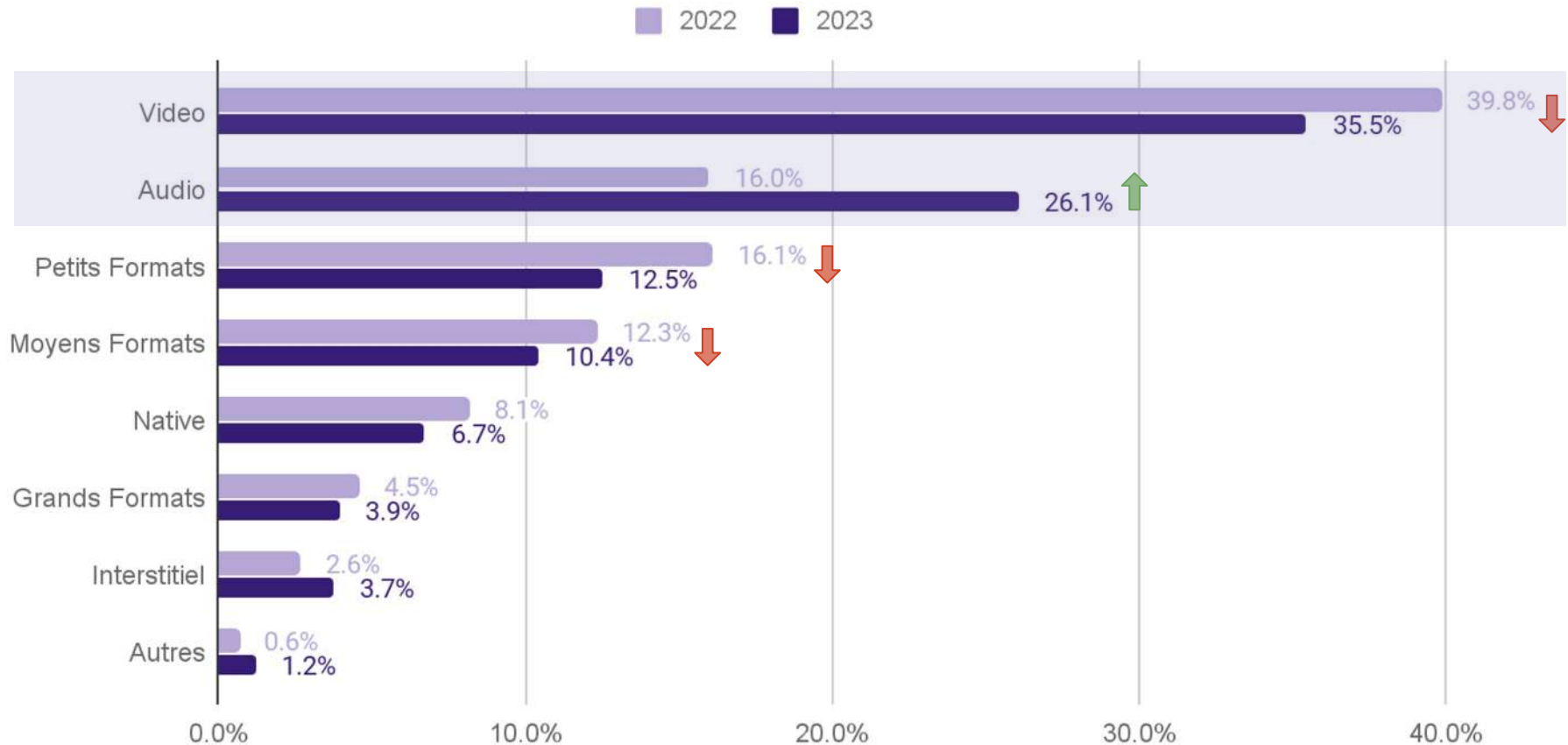
Investments by deal type by format : **Open Auction**



Focus on Preferred deals and Private auctions: Video is the leading format for Private auctions and Preferred deals, Audio is growing strongly

Comparison 2023 vs 2022

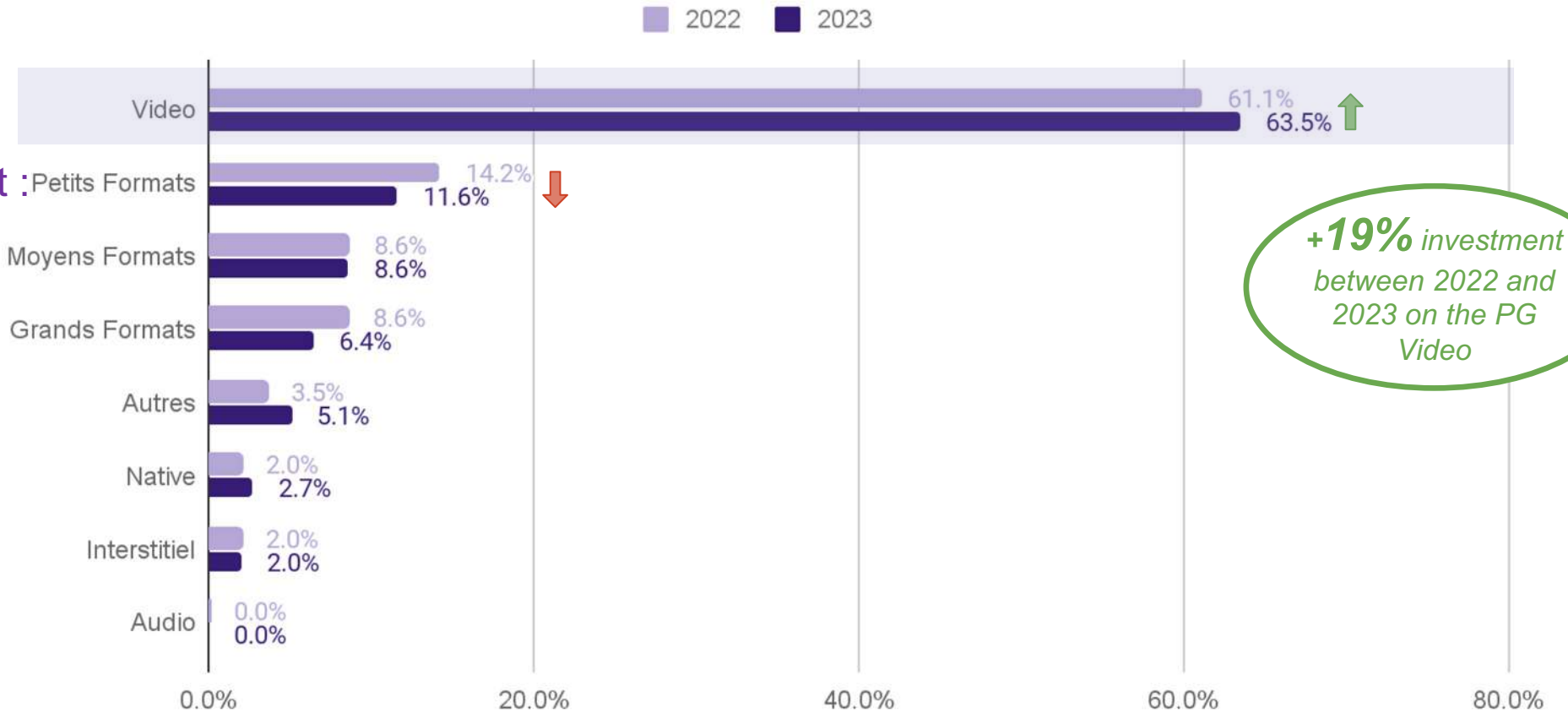
Investments by deal type by format: **Private Auction / Preferred Deal**



Focus on Guaranteed Programmatic Media: Video continues to grow in 2023

Comparison 2023 vs 2022

Investments by deal type by format : PG



+19% investment between 2022 and 2023 on the PG Video



8. Analysis by environment

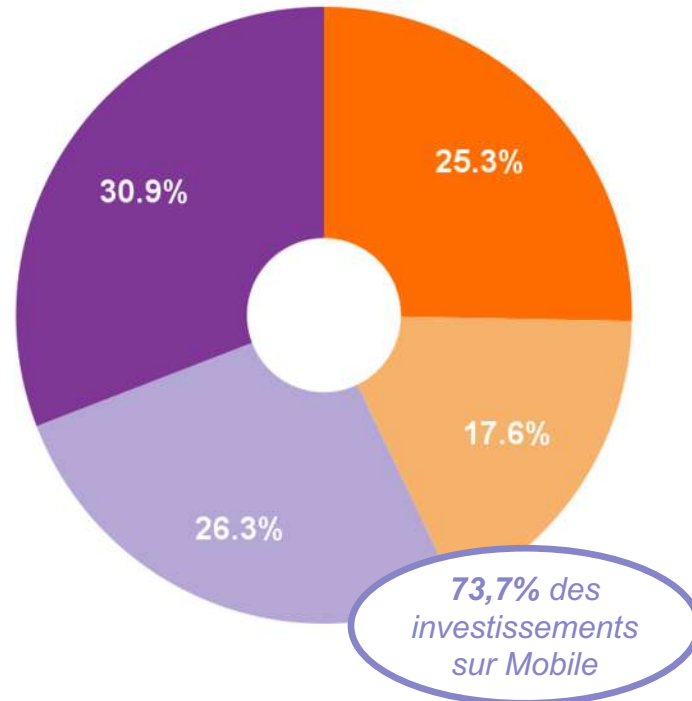
More than half the investment on the Web - Google Chrome and Safari the browsers that capture most of it

2023 summary

Investments per Web / App* environment

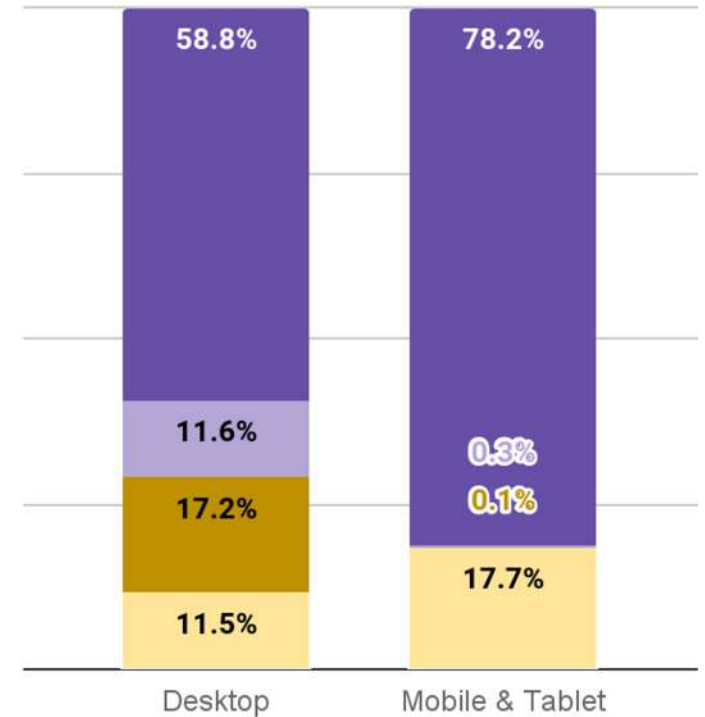


App - Android App - iOS Web - Desktop Web - Mobile



Focus Web
Investissements par Navigateur

Google Chrome Firefox
Microsoft Edge Safari

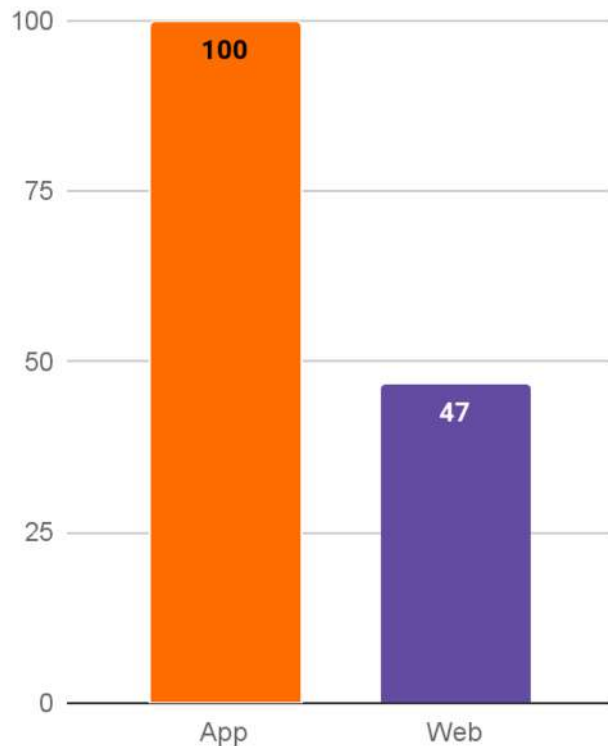


* Data collected on a subset of the cohort that is 'compatible' with the information sought.

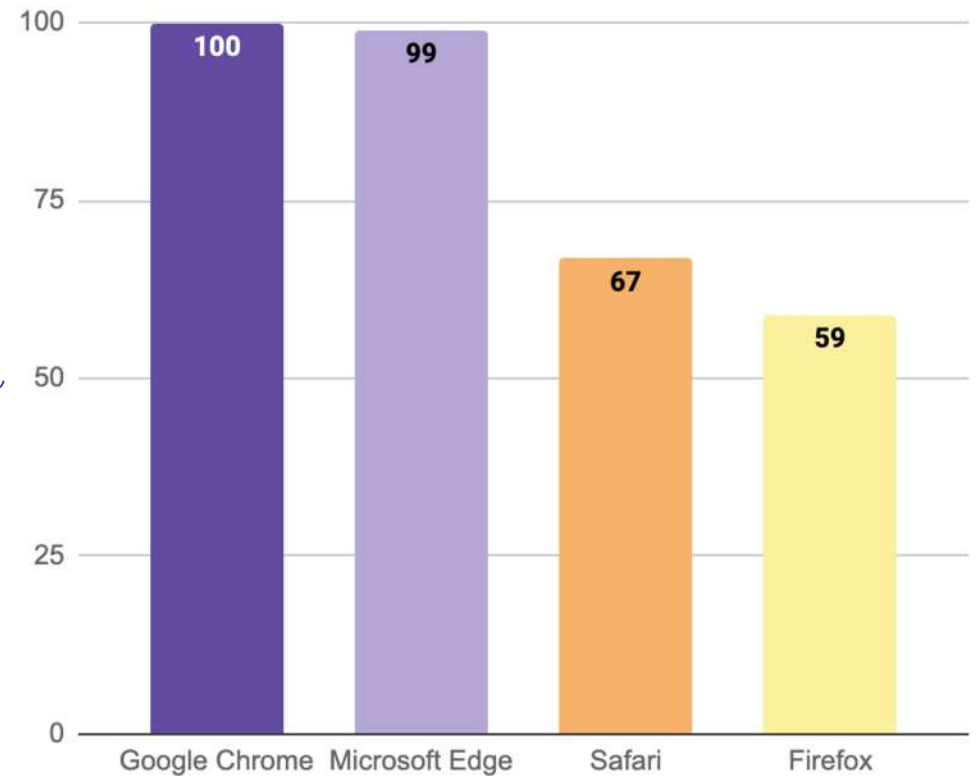
CPM for Apps 2 times higher than for the Web

Summary 2023

CPM* by environment



Focus Web
CPM per Browser



* CPM net publisher, excluding SSP/DSP and Data costs and excluding consultancy or intermediary fees

** Data collected on a subset of the cohort "compatible" with the information sought



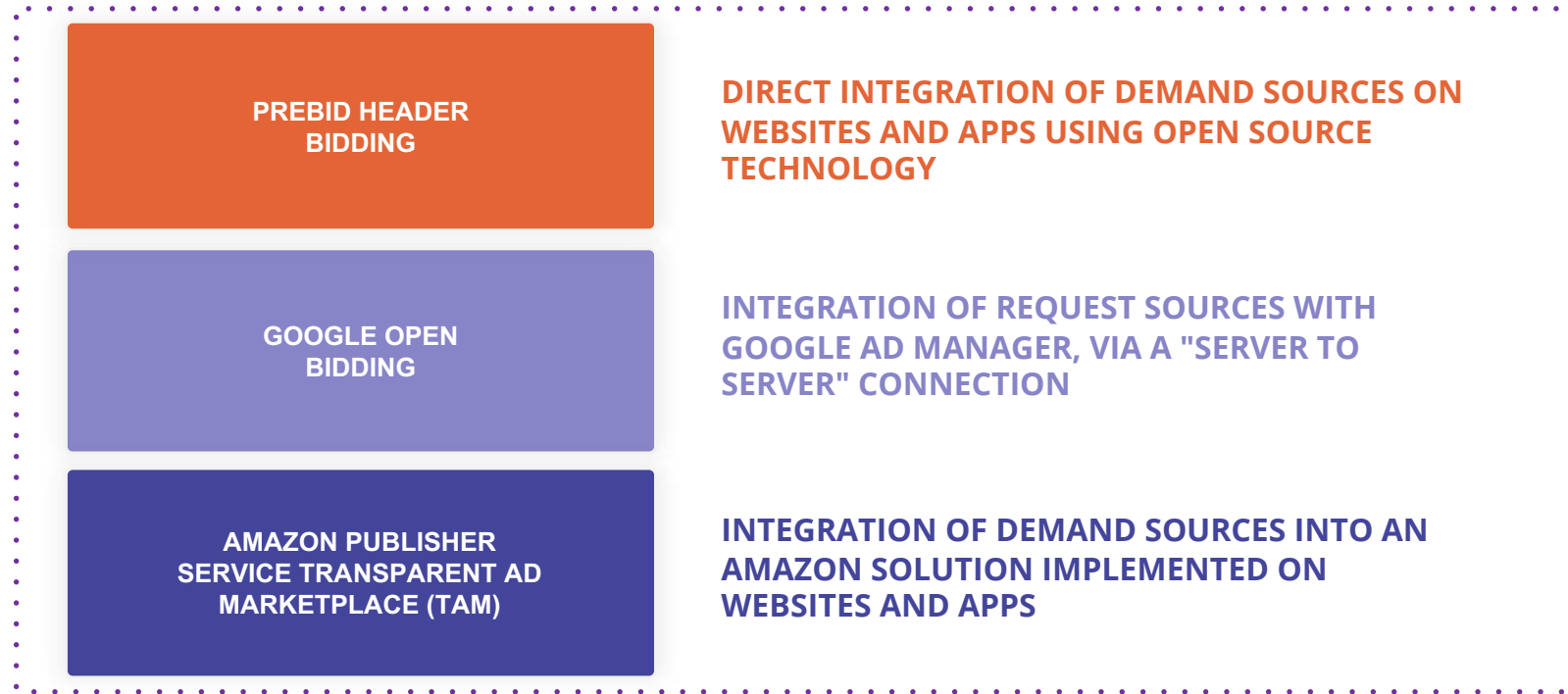
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9. Analysis by supply path

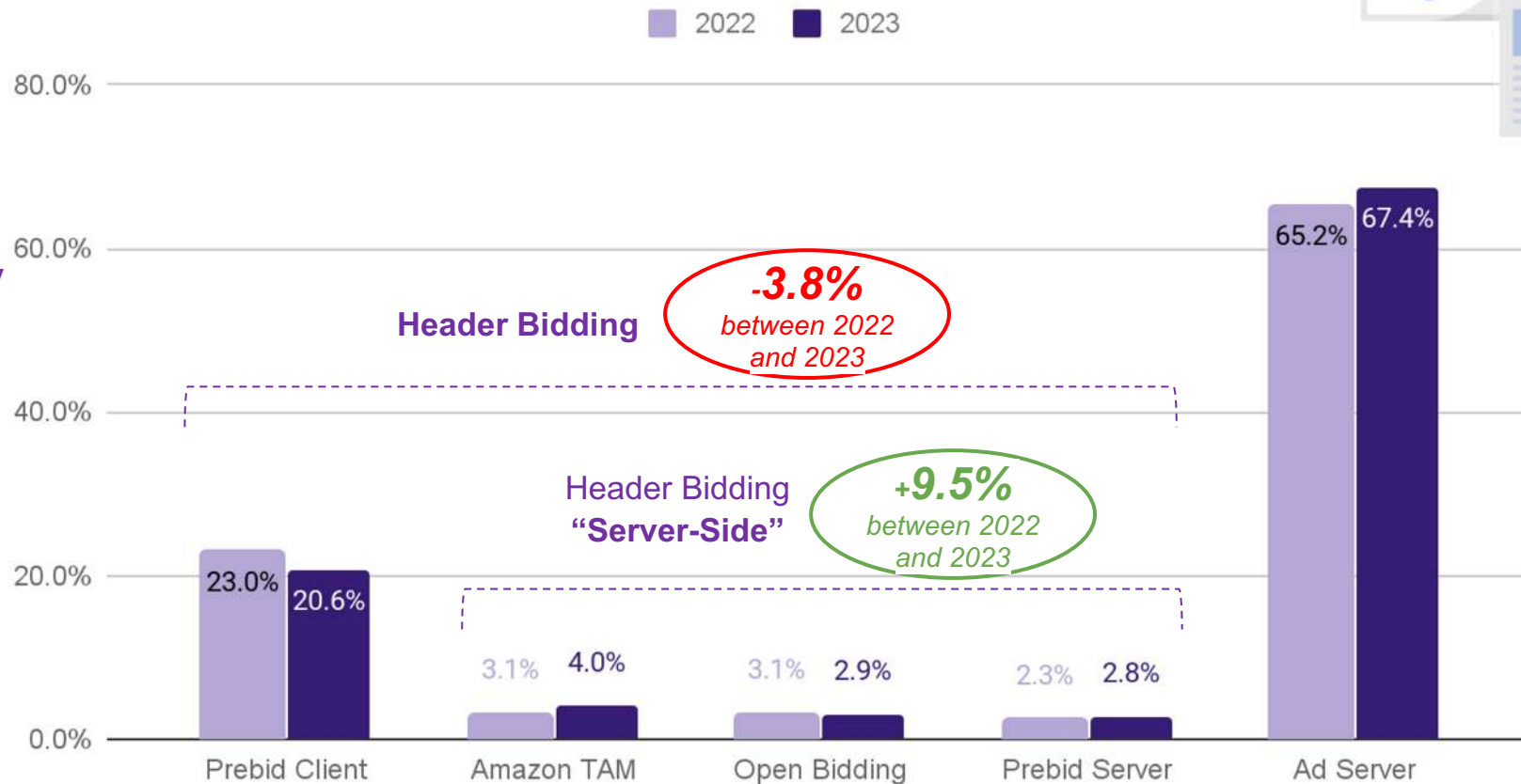
The 3 main access routes to publishers' inventory, excluding Ad Servers and primary SSPs



Decline in Header Bidding and growth in Server Side at the expense of Client Side

Comparison 2023 vs 2022

Breakdown of capital expenditure by supply path



Prebid is the solution most used by advertising agencies, ahead of Open Bidding and Amazon TAM



Summary at the end of 2023

Number of SSPs and "Header Bidding" integrations per advertising network*.



	Prebid	Open Bidding	Amazon TAM
Header bidding solutions usage rate by region	100%	85%	60%
Taux d'utilisation des solutions de header bidding par région	7	5	4
Maximum number of SSPs and Ad networks per Header Bidding solution	16	11	17



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10. Key points

Key points to remember

1. Further deterioration in programmatic investment in **Display (-9%)**, with **CPMs falling by 4%**, continuing a downward trend since 2021
2. The balance between **Instream** and **Outstream** Video remains unchanged, with a sharp **decline** in Outstream **CPM (-21%)**
3. **Native advertising** up by **10%**, with a very strong **H1**
4. Programmatic **audio** still enjoying **strong growth (+58%)**, driven by the increase in **impression volumes**
5. **The Retail sector**, which is increasing its programmatic investment (24%) compared with other sectors,
6. with **6 advertisers in the Top 15**
7. **13% growth in investment in Guaranteed Programmatic Advertising**, which is cannibalising Preferred Deals, with a strong concentration on the Video format - Open Auction down **7%** (excluding Curation)
8. Investments relatively balanced between Web and App, at **57% and 43%** respectively, with **App CPM twice** that of the Web