

In Europe, Programmatic Ad Spending Grows by Double Digits

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eMarketer Editors

Programmatic advertising—defined as the use of automation in the buying, selling or fulfillment of digital display advertising—now accounts for the majority of digital display spending in France, Germany and the UK, following the trend that we've seen in the US.

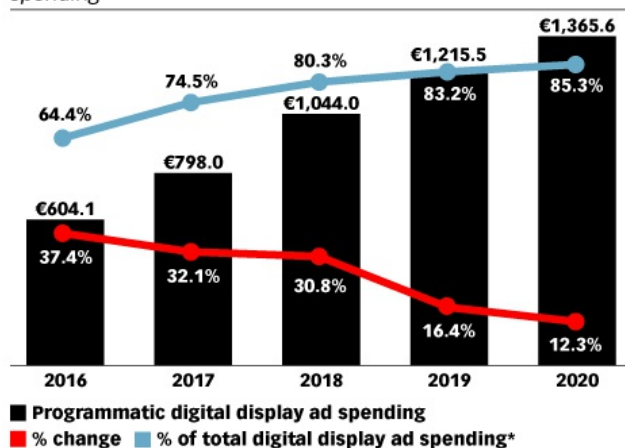
Here's what programmatic ad spending looks like in each country, with forecasts through 2020.

France

We estimate that programmatic ad spending in France reached €1.04 billion (\$1.18 billion) in 2018. In 2019, investment in programmatic ads is predicted to approach €1.22 billion (\$1.38 billion).

Programmatic Digital Display Ad Spending in France, 2016-2020

millions of €, % change and % of total digital display ad spending*



Note: digital display ads transacted via an API, 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; *includes banners, rich media, sponsorship, video and other
Source: eMarketer, Dec 2018

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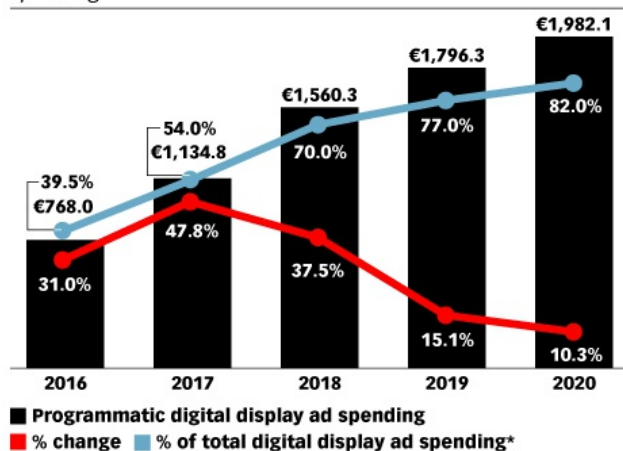
Historically, real-time bidding (RTB) has dominated France's programmatic market, but it is gradually losing share. Together, open auctions and private marketplace (PMP) deals made up 51.0% of all programmatic spending in 2018, but RTB will account for just 48.5% in 2019. The rise of social media display advertising, typically bought via programmatic direct deals, will remain a key factor.

Germany

In 2018, programmatic advertising accounted for 70.0% of digital display ad spending in Germany, and outlays on programmatic ads will rise more than 15% in 2019. The advent of the EU's General Data Protection Regulation (GDPR) somewhat depressed spend in mid-2018, but may not have long-term negative effects.

Programmatic Digital Display Ad Spending in Germany, 2016-2020

millions of €, % change and % of total digital display ad spending*



Note: digital display ads transacted via an API, 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 as well as mobile phones, tablets and other internet-connected devices; *includes banners, rich media, sponsorship, video and other
Source: eMarketer, Dec 2018

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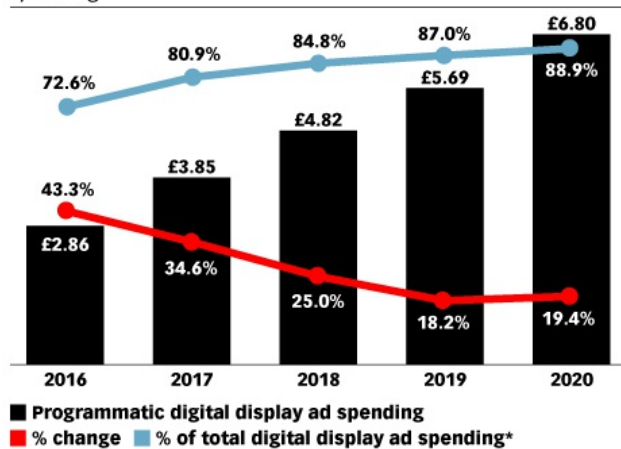
RTB in Germany (again, including open auctions and PMP deals) will account for 51.0% of the programmatic total in 2019, compared with programmatic direct's 49.0%. Spending on social media advertising will continue to boost outlays in direct here as well.

UK

Nearly nine in 10 digital display ad dollars will be spent on programmatic inventory in the UK this year. Despite uncertainties around the effects of GDPR and Brexit, programmatic's march continues unabated.

UK Programmatic Digital Display Ad Spending, 2016-2020

billions of £, % change and % of total digital display ad spending*



Note: digital display ads transacted via an API, including everything from publisher-erected APIs to more standardized RTB technology; includes native ads and ads on social networks like Facebook, Snapchat, and Twitter; includes advertising that appears on desktop/laptop computers, mobile phones, tablets and other internet-connected devices; *includes banners, rich media, sponsorship, video and other
Source: eMarketer, Dec 2018

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In the UK, RTB is losing share as a desire for greater control over programmatic spending has led to a skew toward programmatic direct trades. And within RTB spending, PMP trades are gaining ground. Open exchanges will persist and register growth, but not as quickly as those more controlled environments. Indeed, in 2020, we'll see PMP spend overtake open exchange spend for the first time.

For an in-depth look at programmatic buying in France, Germany and the UK, eMarketer subscribers can access each country's report now. For trends in US programmatic buying, read eMarketer's forecast report from October.

Report by Lauren Fisher Oct 11, 2018

US Programmatic Ad Spending Forecast Update 2018

US PROGRAMMATIC
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2018

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Through 2020

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