



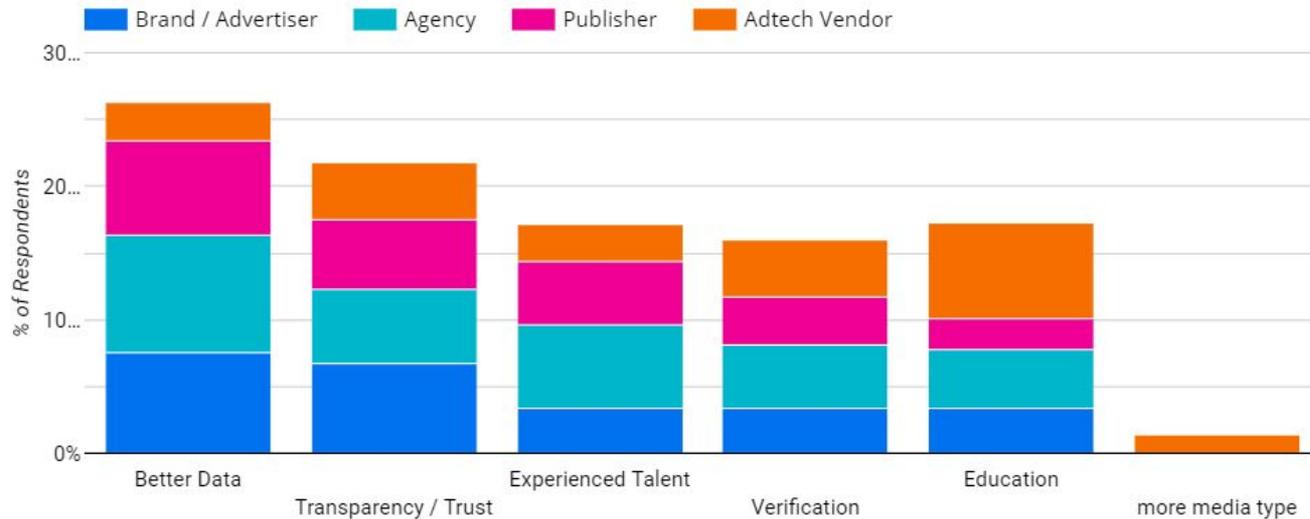
2021 Programmatic Survey Results Presentation



Insights

What is the key to realize more Programmatic Spend in 2021/2022?

According to the survey, “Better data” and “Transparency” are TWO vital factors to enable programmatic success no matter which stakeholder group our respondents are in. 83% of Adtech companies indicated that the growth of programmatic requires continuous investment in “Education” while 63% of agencies voted for one important resource - “Experienced Talent” to enhance and grow their existing team.

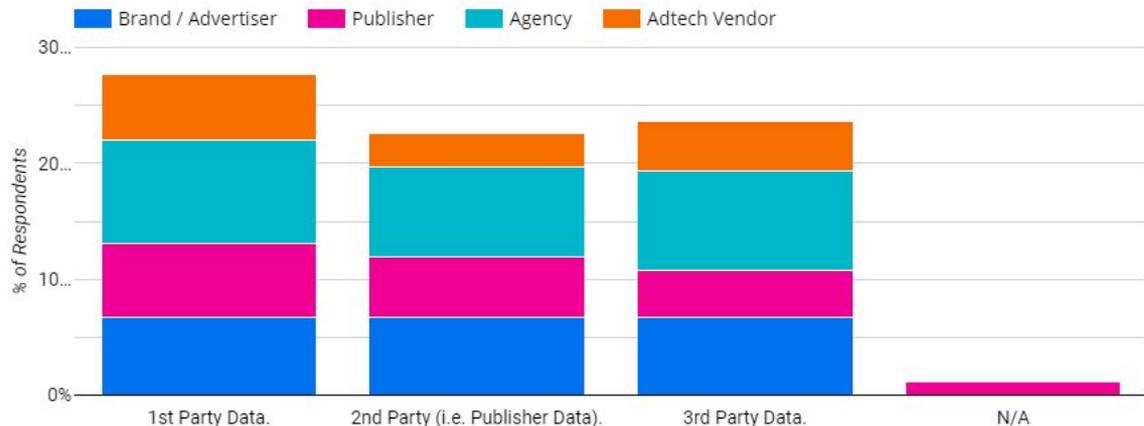


Insights

What sort of data are you using for your Programmatic Activation?

Most brands and agencies are working with several data sources to achieve a better balance between scale and accuracy. With 88% respondents expressed concerns upon the quality of 3rd party cookies, the demand and reliance on first-party and higher quality data (i.e. CRM and website analytics) will increase in the new ecosystem.

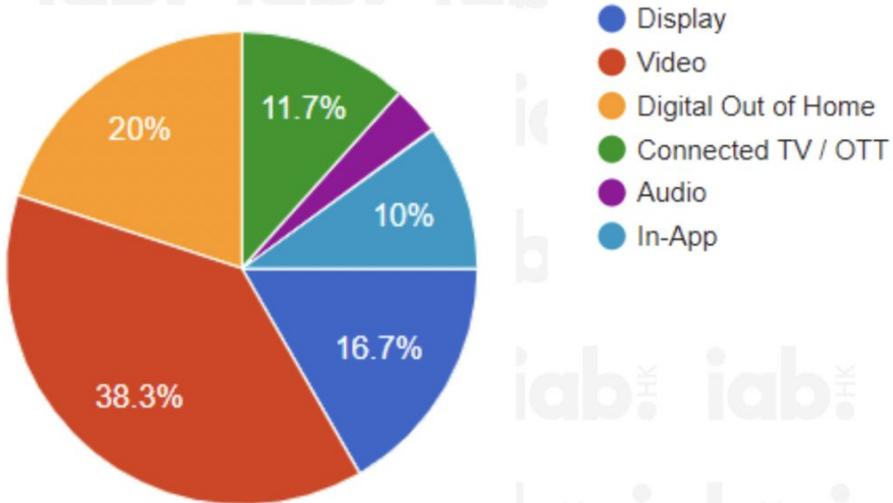
It's critical for brands to proactively evaluate the impact of their current targeting strategy when cookies goes away. In the meantime, both brands and agencies will need to get ready for testing out identity solutions which are aligned in their company roadmap and campaign KPIs.



Insights

Which Programmatic Channels do you expect to grow the MOST in 2021?

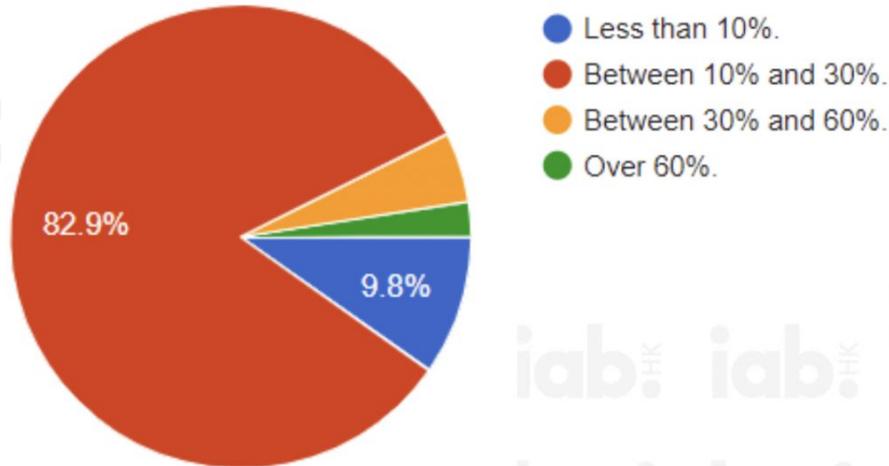
- Currently, display, video and in-app are the top 3 programmatic channel.
- Marketers expressed that video, digital out of home and In-app are the most expected to grow programmatic channel in 2021.



Insights

How much more do you expect to buy via Programmatic Channels this year?

- Over 67% of respondents expect to buy more via Programmatic channel this year
- And, about 83% of respondents expressed that they will spend 10% - 30% more budget on programmatic channels this year



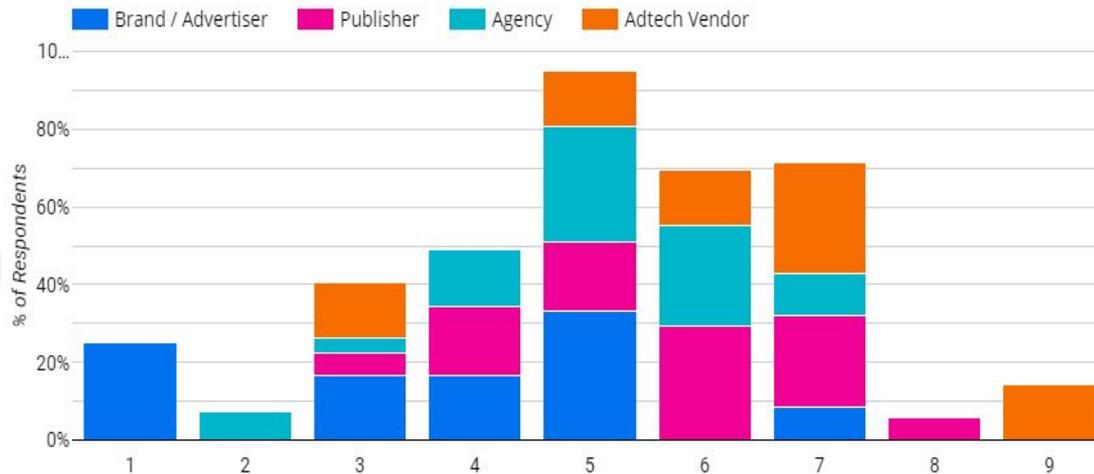
Insights

How prepared are you for the cookieless change? (1 being the least prepared, and 10 being fully prepared)



- 67% of adtech vendors think they are well prepared (scale ≥ 6) for the cookieless future, followed by publishers (59%) and agencies (40%).

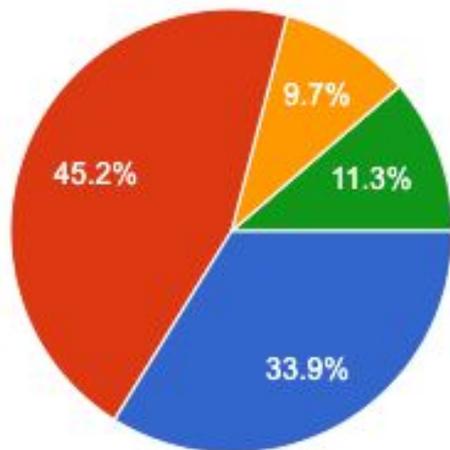
- Brands were the least optimistic, only 8% said they are well prepared for the cookieless change (scale ≥ 6) and 50% of brand responded that the removal of cookies could have a major impact on their digital strategy, especially on campaign performance.



Insights

How impactful do you think the removal of cookies will have to your current strategy?

- Interestingly, advertisers buy through programmatic because of data (74%) and performance (71%), almost half of the respondents think that the removal of cookies is at the level of 'somewhat impactful and no major strategy change'.



- Very impactful - I need to rethink my whole digital strategy today.
- Somewhat impactful – I need to make some changes but no major strategy impact.
- It would have minimal impact.
- Unsure.

Programmatic Committee Members

Johnnie Leung (Lead), Business Development Director, **The Trade Desk**

Jimmy Poon, Head of Sales and Trading, **Blis**

Sharon Chan, Data Strategy Lead, **Google**

Andy Chung, Managing Director, **GroupM (Xaxis)**

Sally Ng, Vice President of Sales, HK & Taiwan, **Hivestack**

Franny Geng, Associate Director, Digital Product, **SCMP Hearst**

Jenny Tsang, Programmatic Advertising Lead, **Verizon Media**

