



## PUBLIC POLL FINDINGS AND METHODOLOGY

### Programmatic is top choice for buying top ad formats

Media quality issues, including increased risk and fraud, are the top challenges in programmatic advertising for marketers

#### Topline Findings

**Washington, DC, November 18, 2021** – To gain a better understanding of perceptions of programmatic advertising, particularly supply path optimization (SPO), IAS partnered with Ipsos, one of the leading insights and analytics companies, to survey U.S. digital media experts who buy digital ads programmatically.

This research shows how media experts are using SPO to increase the effectiveness and efficiency of their programmatic advertising campaigns across formats and environments.

#### Key Takeaways

- Half of brands and agencies report that at least half of their advertising budget is used for programmatic technology, especially video in social and mobile environments.
  - 71% of ad buyers currently buy social video ads programmatically
  - 61% of ad buyers currently buy mobile web video ads programmatically
  - 52% of ad buyers say half or more of their advertising budget is transacted programmatically
- Brands and agencies view the reach of programmatic as a top benefit, but they also worry about diminished levels of transparency.
  - 54% of ad buyers say maximizing audience reach and scale is the primary benefit of programmatic advertising
  - 42% of ad buyers say lack of transparency is the primary challenge with programmatic advertising
- As more budgets flow to programmatic advertising, media experts are embracing Supply Path Optimization for identifying low-cost, transparent buying channels.
  - 60% of ad buyers are currently implementing supply path optimization strategies
  - 96% are satisfied or very satisfied with their supply path optimization strategy
  - 50% say increasing campaign effectiveness is the main SPO benefit
- Nearly all media experts are already implementing or planning to implement third-party services or technology solutions.
  - 95% are implementing/planning to implement third-party services or solutions for supply path optimization
  - 57% currently partner/plan to partner with external consultants to audit their supply chain
  - 48% currently implement/plan to implement third-party supply path verification and monitoring technology
- Media experts are divided regarding the party responsible for programmatic advertising strategies and activities. Additionally, brands and agencies do not see eye to eye when it comes to the party most responsible for monitoring media quality nor do they agree on who should take the lead in most SPO tasks

*These are the findings of an IAS survey conducted by Ipsos between June 14 and 25, 2021. For this survey, a sample of 200 brands and agencies were interviewed online in English. The poll has a credibility interval of plus or minus 7.9 percentage points for all respondents.*



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For full results, please refer to the following annotated questionnaire:

Q1. Which of the following advertising formats is your company currently purchasing via programmatic technology?

	Total
Base: All Respondents	200
Audio (i.e., digital radio excluding podcasts)	37%
Connected TV	38%
Desktop display	58%
Desktop video	58%
Mobile web display	56%
Mobile web video	61%
Mobile app display	59%
Mobile app video	60%
Podcast	36%
Search	50%
Social display	58%
Social video	71%
Out-of-home	22%

Q2. To the best of your knowledge, what portion of the advertising budget at your company is transacted programmatically?

	Total
Base: All Respondents	200
Less than 10%	4%
10% to 30%	14%
31% to 50%	28%
51% to 80%	48%
More than 80%	4%
None/Not sure	2%



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Q3. [GRID TABLE] Who is most responsible for the following programmatic advertising activities for your company?

	Advertiser/ brand (i.e., in-house team)	Agency partner	Independe nt trading desk	Demand side platform	Other technology partner	Not sure
Base: All Respondents (n=200)						
Design and oversee programmatic strategy	48%	26%	14%	8%	2%	1%
Own and manage partnerships with tech providers	46%	24%	18%	7%	3%	2%
Submit bids on impressions	40%	32%	15%	8%	2%	2%
Monitor media quality (e.g., ad fraud, brand risk, viewability, etc.) in live campaigns	46%	29%	14%	6%	4%	1%
Optimize campaigns mid- flight	42%	34%	12%	8%	3%	2%
Provide post-campaign reporting and insights	40%	32%	16%	10%	2%	1%
Assess campaign ROI	40%	33%	14%	8%	3%	2%



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Q4. In your opinion, what are the main benefits of programmatic advertising?

	Total
Base: All Respondents	200
Maximizes audience reach and scale	54%
Increases campaign effectiveness	51%
Time efficiency (e.g., no need for lengthy negotiations with publisher)	50%
Cost efficiency (e.g., lower CPMs, etc.)	44%
Improves data transparency	44%
Real-time measurement and campaign optimization	42%
Improves campaign ROI	42%
Workflow automation allowing for more strategic planning	42%
Enhances audience targeting capabilities	37%
Time efficiency (e.g., no need for lengthy negotiations with publisher)	50%
Cost efficiency (e.g., lower CPMs, etc.)	44%

Q5. In your opinion, what are the primary challenges with programmatic advertising?

	Total
Base: All Respondents	200
Increased brand risk	46%
Increased ad fraud	44%
Lack of transparency	42%
Hidden ad tech costs/fees	39%
Low viewability levels	37%
Lack of premium inventory	36%
May keep closing/winning bid prices undisclosed	32%



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Q6. Which of the following will be the top three programmatic advertising priorities for your company in the next 12 months?

	Total
Base: All Respondents	200
Increase viewability	40%
Increase consumer engagement	37%
Maximize supply path efficiency/efficacy	36%
Enhance transparency in supply chain	32%
Shift to advanced contextual targeting	28%
Reduce brand risk	28%
ROI measurement and attribution	26%
Pivot to first-party data for audience targeting	24%
Reduce ad fraud	24%

Q7. How satisfied are you with the level of transparency your company receives around programmatic ad spending?

	Total
Base: All Respondents	200
Very satisfied (5)	50%
Satisfied (4)	43%
Neither satisfied nor dissatisfied (3)	6%
Dissatisfied (2)	1%
Very dissatisfied (1)	-
<i>Top2Box (Very Satisfied/ Satisfied)</i>	<i>94%</i>
<i>Low2Box (Dissatisfied/ Very Dissatisfied)</i>	<i>1%</i>



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Q8. [GRID TABLE] To the best of your knowledge, what is the breakout of your company's programmatic ad spending as it flows through the supply chain? (Values must add up to 100%)What percent (%) are ...

	0-25%	26-50%	76-100%	Mean
Base: All Respondents (n=200)				
Agency fees	81%	16%	-	19.6
Demand side platform fees	96%	2%	-	15.1
Media quality monitoring fees	95%	2%	-	15.4
Other tech fees	96%	2%	-	11.4
Supply side platform fees	94%	3%	-	14.3
Working Media (i.e. paid to publisher)	89%	8%	*	16.1
Unknown fees	96%	2%	*	8

Q9. Is your company implementing a supply path optimization strategy?

	Total
Base: All Respondents	200
Currently implementing	60%
Planning to implement in the next 12 months	34%
Not planning to implement in the next 12 months	2%
Not sure	4%



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Q10. [GRID TABLE] Who is most responsible for the following supply path optimization activities for your company?

	Advertiser/ brand (i.e., in-house team)	Agency partner	Indepe nt trading desk	Demand side platform	Other technology partner	Not sure
Base: Total Answering (n=188)	45%	24%	18%	10%	2%	2%
	49%	27%	14%	6%	3%	1%
Assess campaign ROI	49%	29%	12%	8%	1%	1%
Design and oversee supply path optimization strategy	43%	31%	11%	11%	3%	2%
Monitor key performance indicators during live campaigns	43%	34%	15%	8%	1%	-
Optimize supply path during live campaigns	45%	24%	18%	10%	2%	2%
Own and manage day- to-day supply path optimization activities	49%	27%	14%	6%	3%	1%

Q11. In your opinion, what are the primary benefits of implementing a supply path optimization strategy?

	Total
Base: All Respondents	200
Increase campaign effectiveness	50%
Improve campaign ROI	48%
Assess the value of each path to valuable inventory	40%
Reduce brand risk	40%
Eliminate hidden costs/fees	40%
Reduce the number of paths to valuable inventory	37%
Reduce ad fraud	36%
Lower CPMs	24%



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Q12. In your opinion, what are the main concerns with implementing a supply path optimization strategy?

	Total
Base: All Respondents	200
Impact on audience targeting capabilities	56%
Reach and scale challenges	52%
Reduced access to preferred media partners	50%
Higher CPMs	43%
Worse campaign effectiveness	34%
I don't know where to start	12%

Q13. How satisfied are you with the supply path optimization strategy at your company?

	Total
Base: All Respondents	200
Very satisfied (5)	54%
Satisfied (4)	41%
Neither satisfied nor dissatisfied (3)	4%
Dissatisfied (2)	-
Very dissatisfied (1)	-
<i>Top2Box (Very Satisfied/ Satisfied)</i>	<i>96%</i>
<i>Low2Box (Dissatisfied/ Very Dissatisfied)</i>	<i>-</i>

Q13. How satisfied are you with the supply path optimization strategy at your company?

	Total
Base: All Respondents	200
Increased brand risk	46%
Increased ad fraud	44%
Lack of transparency	42%
Hidden ad tech costs/fees	39%
Low viewability levels	37%
Lack of premium inventory	36%
May keep closing/winning bid prices undisclosed	32%



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Q14. [GRID TABLE] In your opinion, who should be most responsible for ensuring the programmatic advertising supply chain is efficient?

	1	2	3	4	5	Not Sure (0)
Base: All Respondents (n=200)	200					
Advertiser/brand (i.e., in-house team)	54%	17%	16%	10%	2%	2%
Agency partner	20%	34%	20%	14%	10%	2%
Independent trading desk	10%	16%	20%	32%	19%	2%
Demand side platform	12%	22%	27%	25%	12%	2%
Other technology partner	2%	8%	15%	18%	54%	2%
Not sure	2%	-	-	-	-	98%

Q15. Is your company implementing third-party services or technology solutions that facilitate supply path optimization activities?

	Total
Base: Total answering	196
Currently implementing	60%
Planning to implement in the next 12 months	35%
Not planning to implement in the next 12 months	3%
Not sure	2%

Q16. What type of third-party services or technology solutions is your company implementing or planning to implement that facilitate supply path optimization?

	Total
Base: Total answering	186
Partnering with external consultant to audit supply chain	57%
Supply path verification and monitoring technology from third-party vendor	48%
Building our own SPO solution (e.g., reducing SSP lists, etc.)	44%
Partnering with agency to audit supply chain	44%
DSP-provided SPO algorithm	41%
Bidding as a service	33%
Not planning to implement any third-party services or technology solutions in the next 12 months	1%
Not sure	1%



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### About the Study

These are the findings from an Ipsos poll conducted online in English between June 14 and 25, 2021 on behalf of IAS. This poll is based on a sample of 200 brands and agencies.

The sample for this study was randomly drawn from Ipsos' online panel (see [link](#) for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see [link](#) for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 7.9 percentage points for all respondents.

A link to the IAS report can be found [here](#).

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### **About Ipsos**

Ipsos is the world's third largest Insights and Analytics company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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