

Turn Advertising Intelligence Index | February 2014

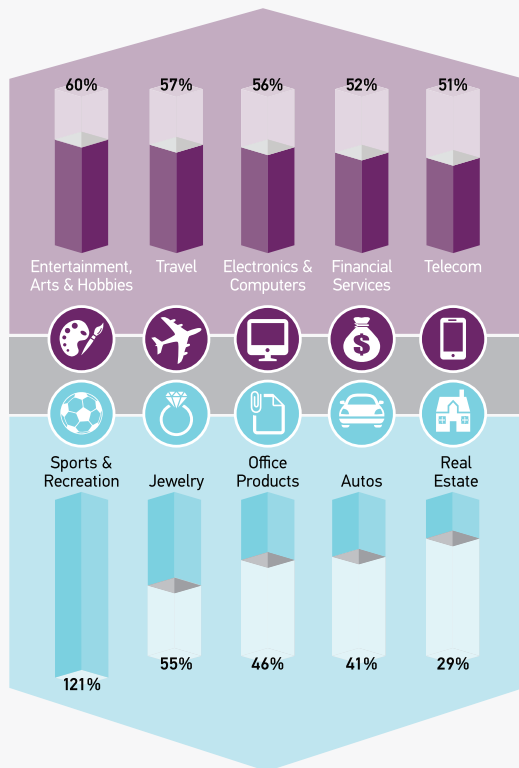
The Global Programmatic Race Gets Real



Competitive ranking of global channels

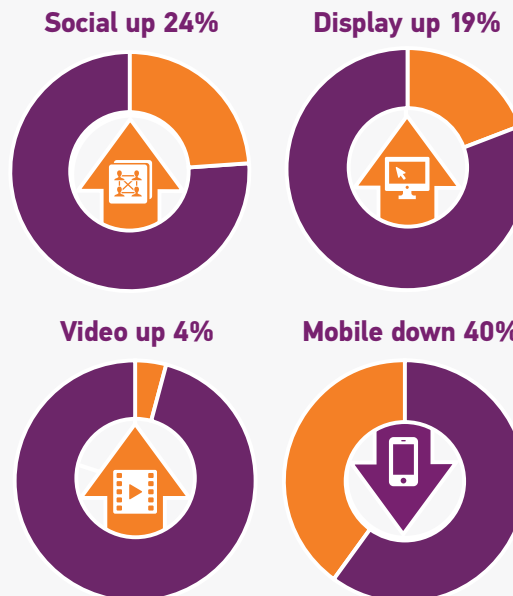
All channels became more competitive over the year. From most competitive to least competitive the channels are: display, social, video, and mobile.

Top 10 industry movers becoming more or less competitive January 2013–January 2014*

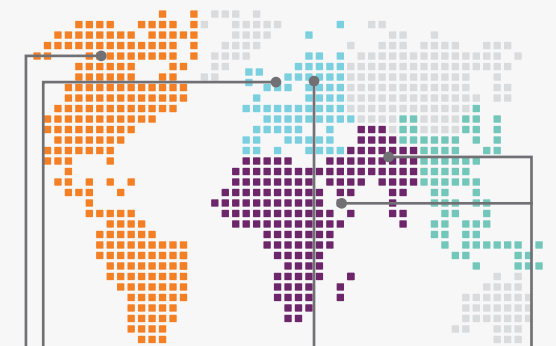


The price to play: eCPM changes

For all channels but mobile, increased competition drove higher eCPM in January 2014 compared with January 2013. For mobile, despite increasing competition throughout the year, increased supply appears to have prevented higher prices.



Regional insights



Established programmatic markets (Americas, Europe) are more competitive than emerging markets (Asia, Africa, and the Middle East)

Counter to global trends, the mobile market in Europe is more competitive than the video market.

Counter to global trends, where display is more competitive than social, the Intelligence Index values for both Africa and the Middle East indicate the opposite, although the values are very close.

Applying Economic Models to the Real-Time Marketplace

*The Turn Advertising Intelligence Index (TAII) is based on the Herfindahl Index (http://en.wikipedia.org/wiki/Herfindahl_index), the accepted global standard for measuring competition in a marketplace. The TAII substitutes advertisers' spend share of voice for market share: TAII = sum (advertiser i share of voice²). The index is based on a 0 to 10,000 scale, with lower numbers indicating greater competition.

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