

THE AGE OF GARDENS

TODD TRAN



THE WALLED GARDENS



Teads

THE OPEN GARDEN



Teads



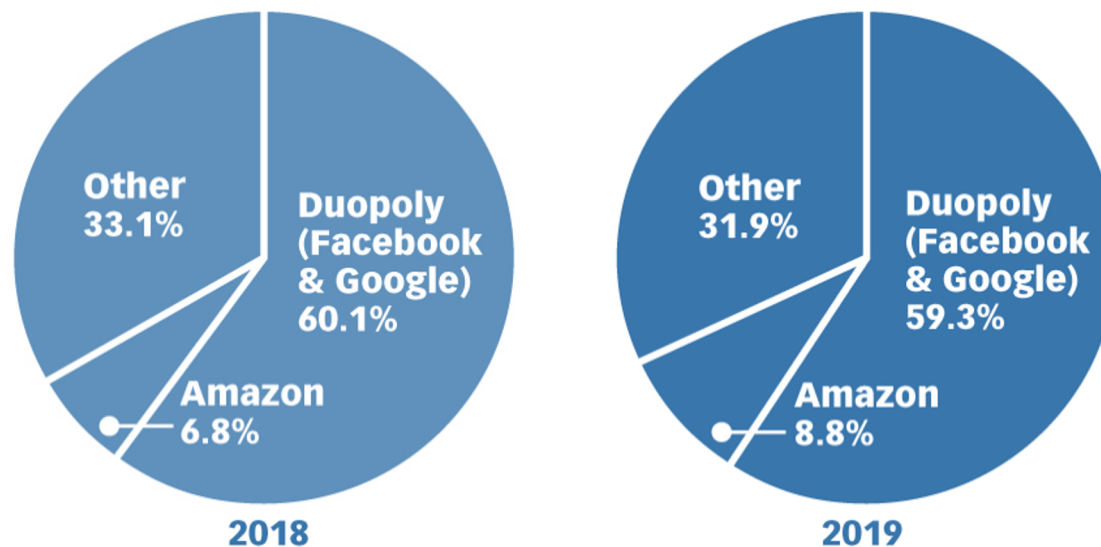
THE WALLED GARDENS

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The garden walls are **only growing higher**

2019 Revenue estimate and market share for Google, Facebook, and Amazon

Duopoly + Amazon share of US digital ad spending, 2018 & 2019
(% of total digital ad spending)



Advertiser
benefits from
walled gardens



Holistic, integrated
global solution at scale



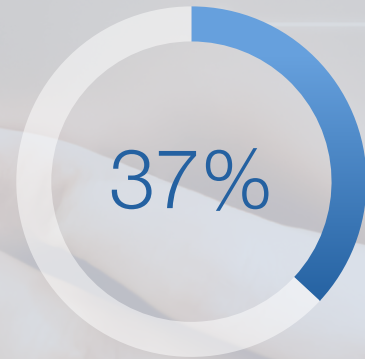
Deterministic user data
at scale

Teads

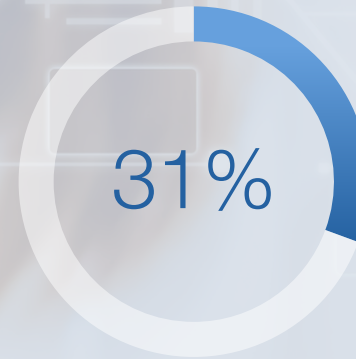


WALLED IN CONCERNS

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brand safety
is a top concern



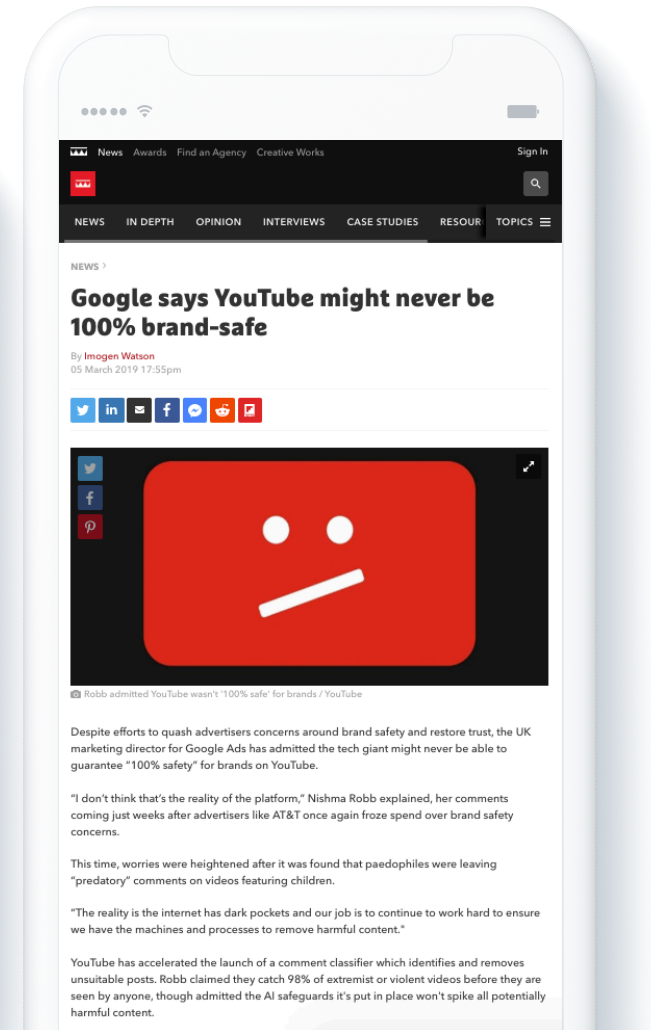
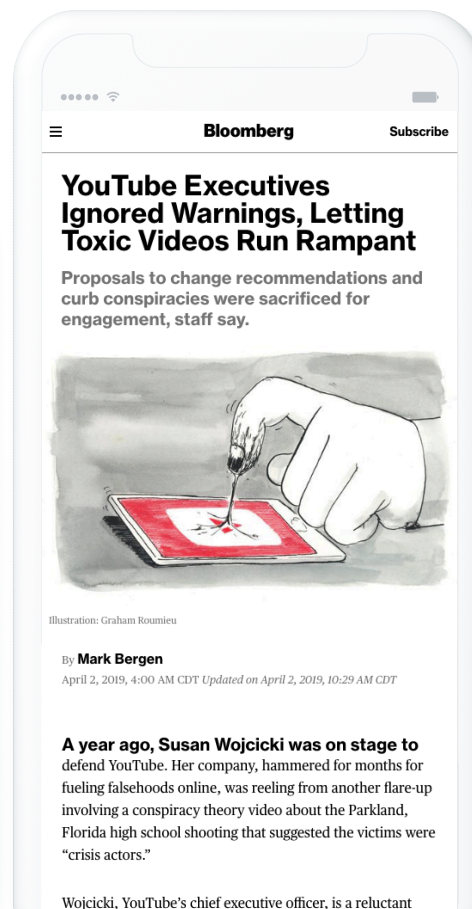
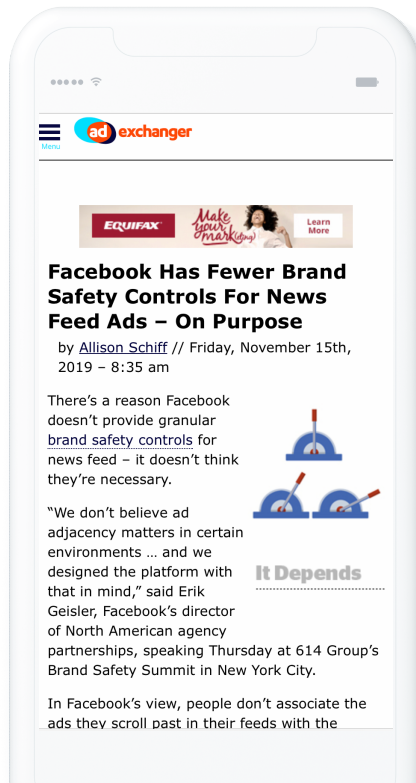
avoiding fake news
is a top priority

For advertisers, brand safety and fake news
are still top of mind

Source: Industry Pulse: Advertising trends, technologies and priorities that will shape the industry in 2019," Integral Ad Science, US & UK March 2019

Teads

Brand safety issues continue to make headlines...



Teads

Social media awashed with fake news and dangerous content during pandemic



A biosafety level 4 laboratory that studies the “world’s most dangerous pathogens” is based in Wuhan, the epicenter of the coronavirus outbreak in China, leading some to claim that the virus could have accidentally escaped the lab.



Chinese Lab That Studies “World’s Most Dangerous Pathogen...”
Some question if virus was accidentally released.
[summit.news](#)



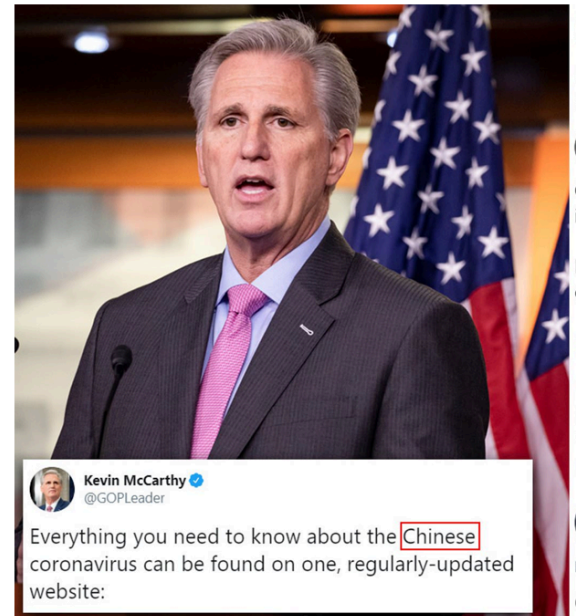
DXN Way of Health, Wealth & Happiness Nuwakot
January 31 at 12:18 AM · 🌐

#For Public Info about #CoronaVirus

#Good news, Wuhan's corona virus can be cured by one bowl of freshly boiled garlic water.

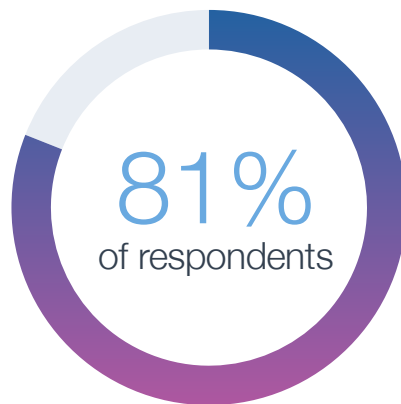
Old Chinese doctor has proven it's efficacy. Many patients has also proven this to be effective. Eight (8) cloves of chopped garlicks add seven (7) cups of water and bring to boil., Eat and drink the boiled garlic water, overnight improvement and healing.

Above all else, PRAY!#share please! #More

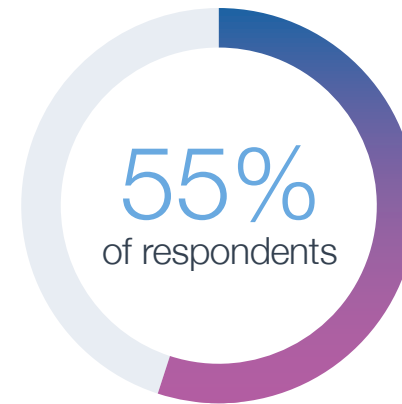


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Consumers are **holding brands accountable** on where they advertise



Believe brands choose
where to advertise

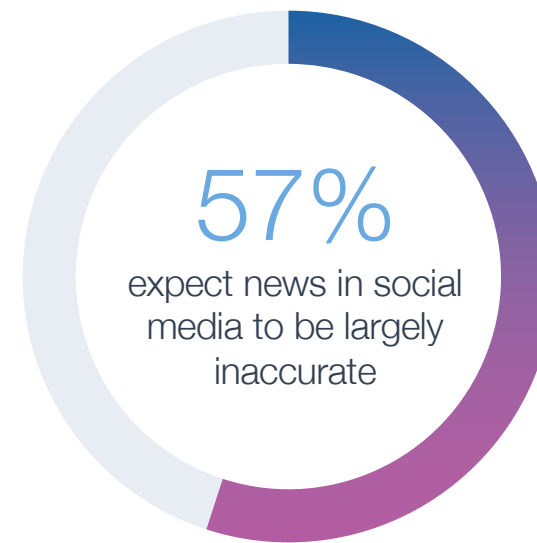
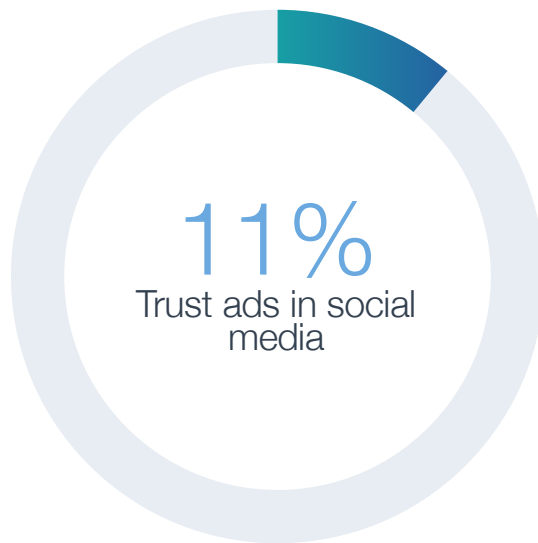


Believe brands are a reflection of
the platform they advertise on

Sources: Teads Advertise Responsibly Study with GWI, August 2019; Source: Teads' proprietary study fielded by CensusWide, "In news we trust", 2018
*Q17. From which media type are you most likely to trust/remember advertising/brand content? (vs. 30% Television; 18% Online News Publications)

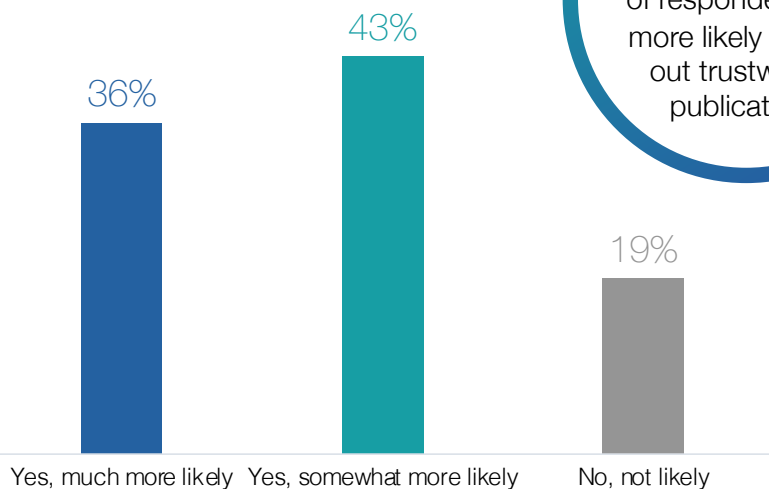
Teads

Lack of Trust

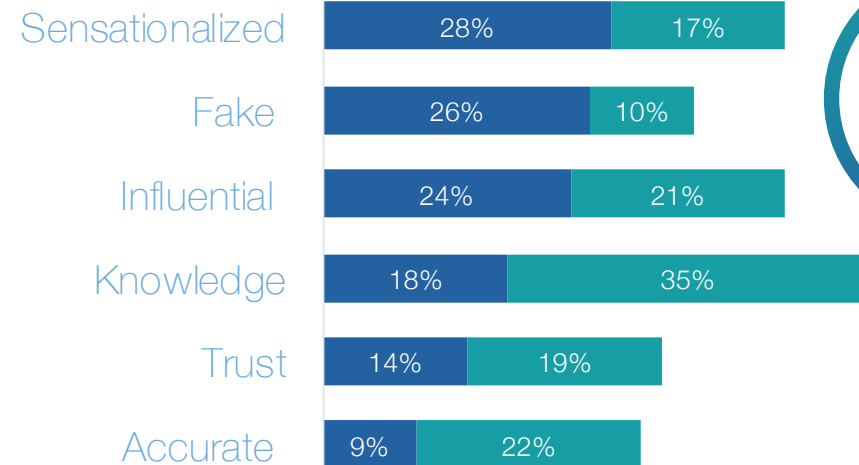


“Fake news” is forcing consumers to seek out trustworthy publications

Has “fake news” made you more likely to find your news from news outlets you trust, % of respondents



Which of the following words do you associate with social media and online, % of respondents



only 11% of respondents trust ads in social media*

■ Social Media (eg. Twitter, Facebook) ■ Online News Publications*

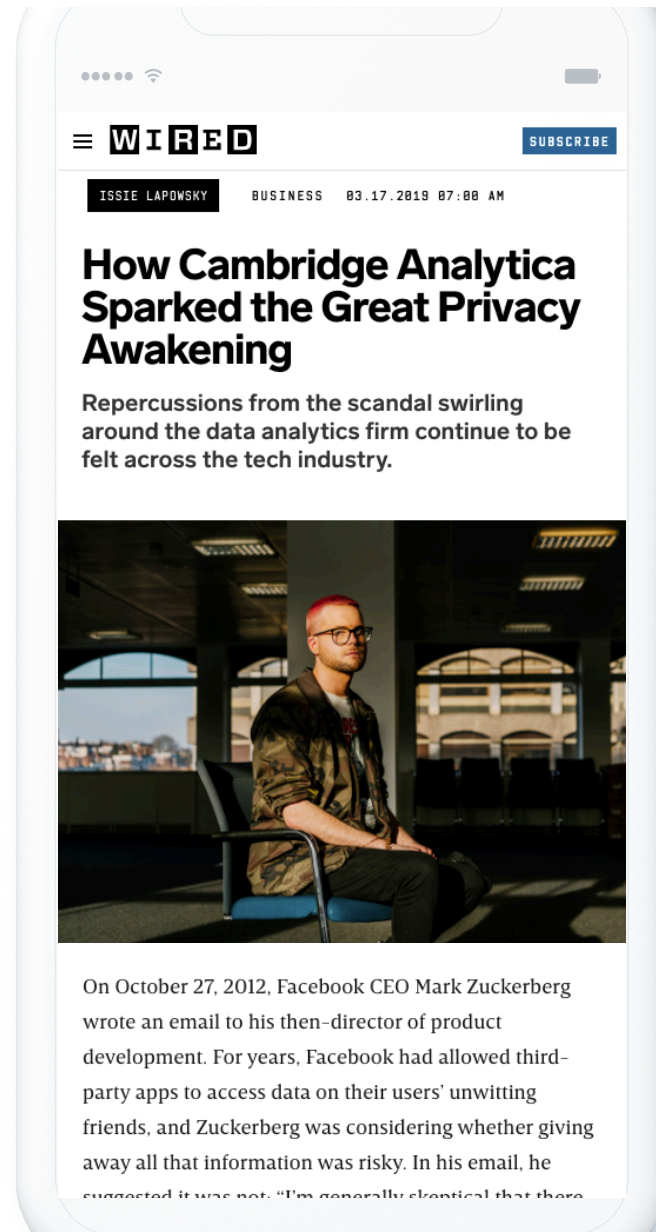
Source: Teads' proprietary study fielded by CensusWide, "In news we trust", 2018

*Q17. From which media type are you most likely to trust/remember advertising/brand content? (vs. 30% Television; 18% Online News Publications)

Teads

Walled gardens represent the real **privacy threat**

Single sign-on data is Personally
Identifiable Information (PII)

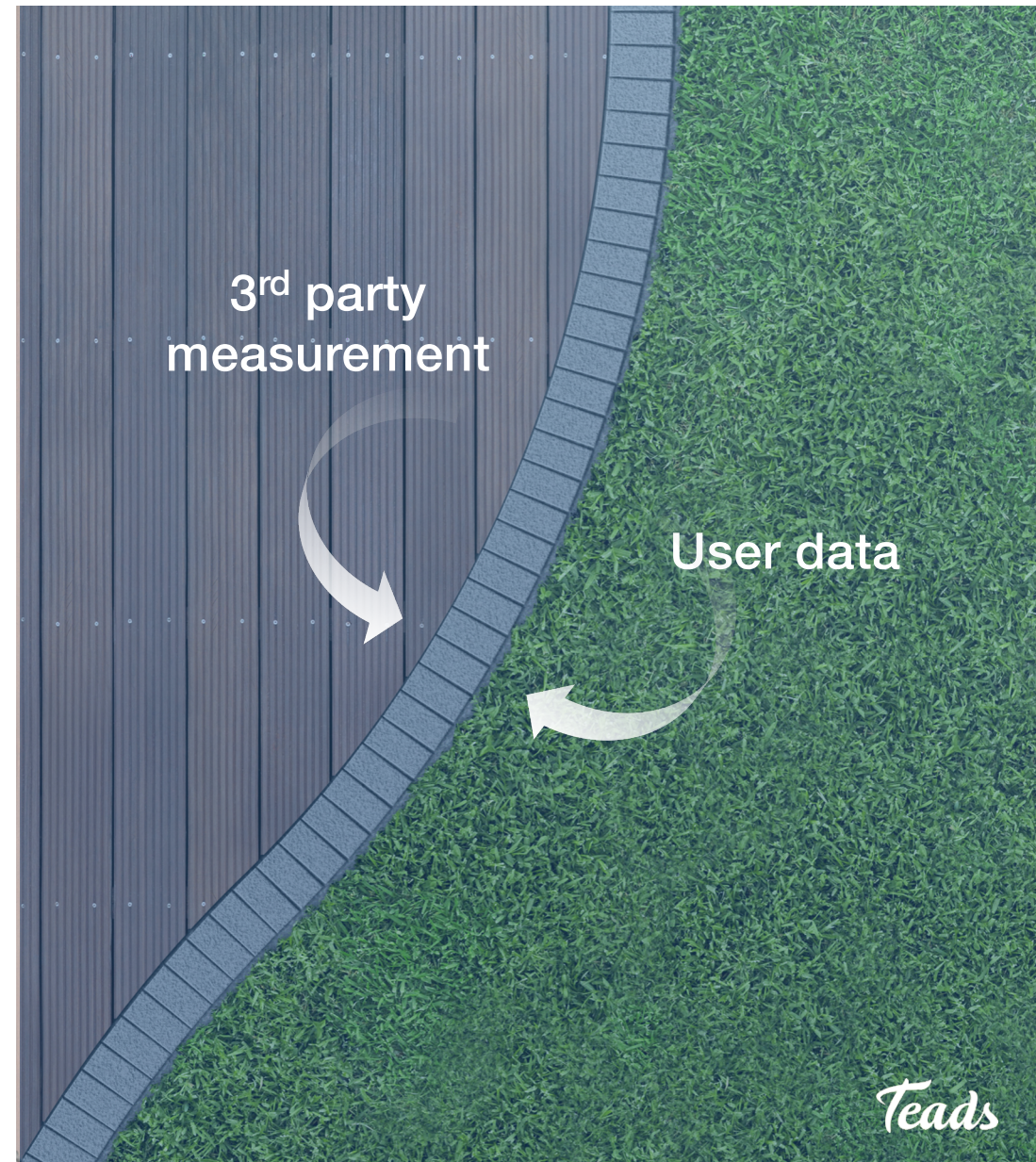


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Creating a **closed system** for advertisers

difficult to utilize 3rd party measurement


user data are not the advertisers' but rather owned by walled gardens



Social media users have a **very short attention span**



**Average In-View Time
for a Newsfeed Ad**
(according to P&G)



THE OPEN GARDEN

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Advertiser **benefits** of an open garden



Programmatic integrated
The open internet



Digital ecosystem is
much more efficient




Better and more scaled
targeting



Small pubs on level playing
field with large pubs

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A man with a beard, wearing a teal jacket and shorts, sits in a field of tall grass. He is looking off to the side. A tree branch hangs over him from the top left. The sky is blue with some clouds. The right side of the image has a dark blue gradient overlay.

CONCERNS IN THE OPEN GARDEN

Tech Friction

VAST Errors

65% Data Match Rates

Lack of non-CPM pricing models

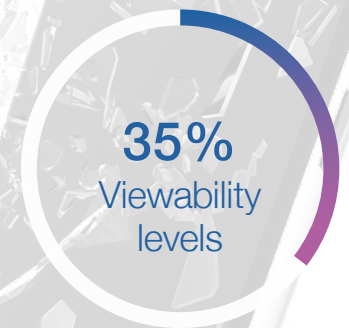
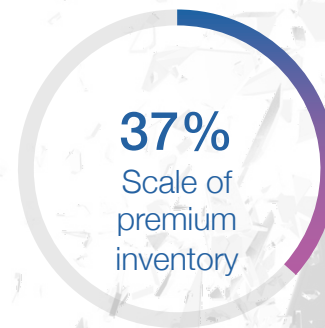
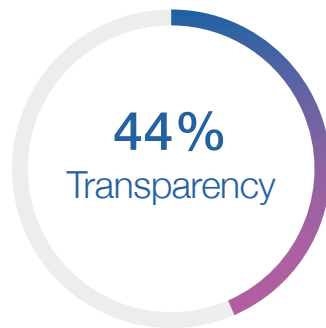
Significant man-hours troubleshooting



Quality Risks

Advertisers believe there are significant programmatic challenges

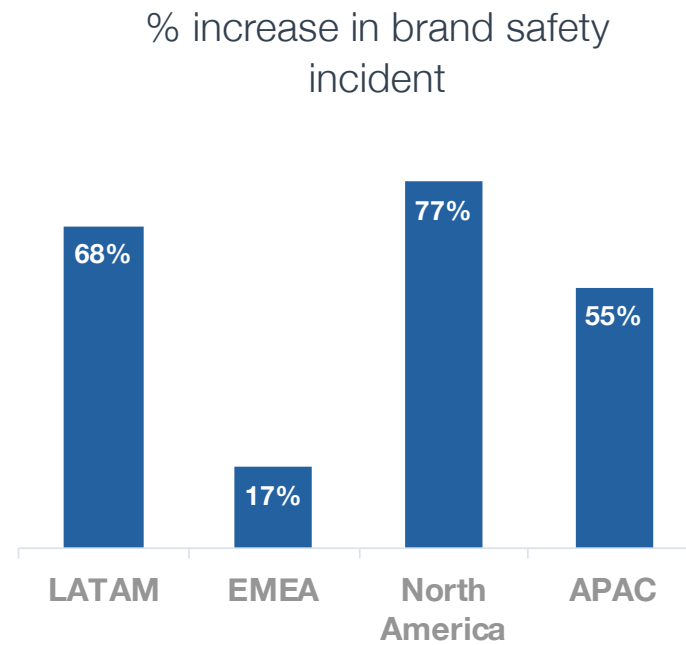
according to US Digital Media Professional Respondents to eMarketer survey



Source: eMarketer; Integral Ad Science (IAS), "Industry Pulse: Advertising trends, technologies, and priorities that will shape the industry in 2019," Jan 29, 2019 (% of respondents who agree)

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Brand Safety incidences increased in 2019

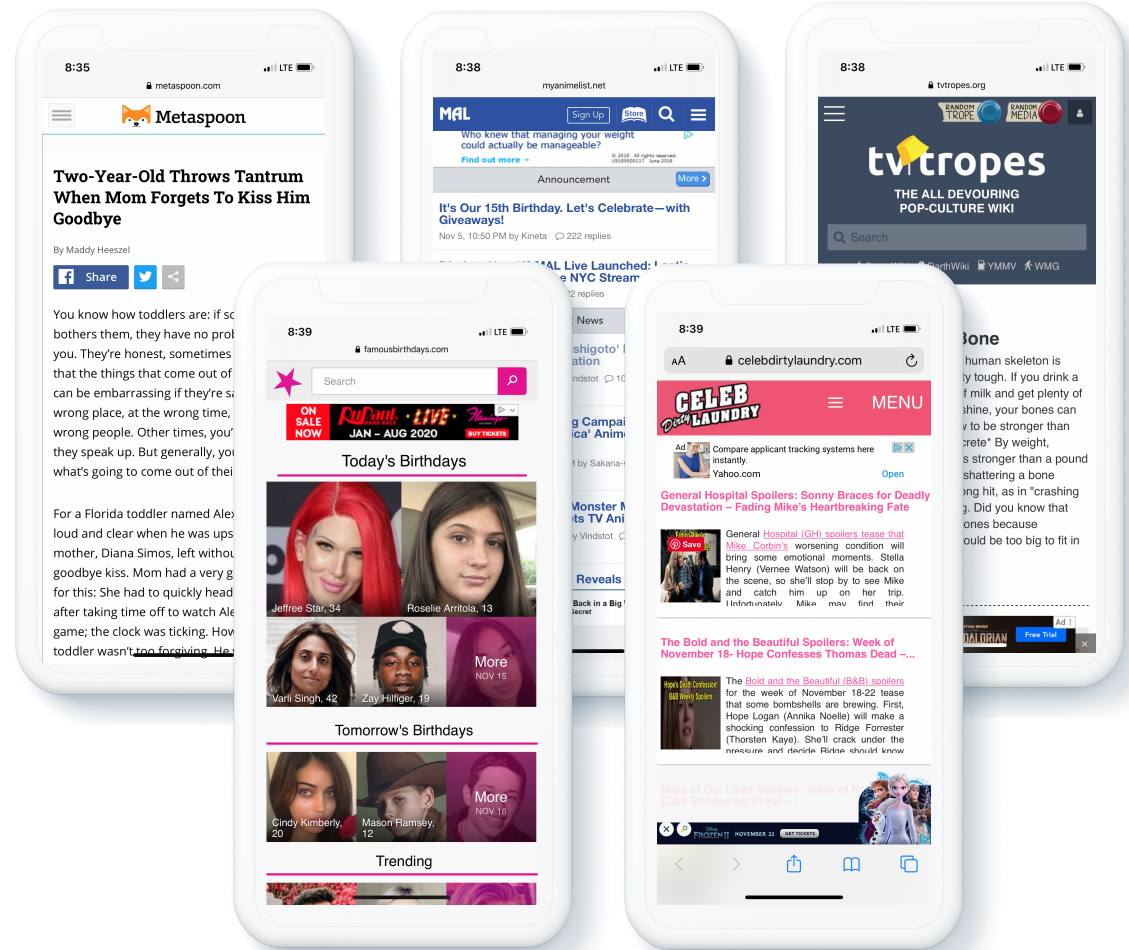


* Authentic impressions are those that are collectively fraud-free, viewable, brand-safe, and in-geo
Source: DoubleVerify Global Insights Report 2019

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Low quality
publishers
are on a level
playing field
with quality pubs



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Duplicate supply sources dominate programmatic

“Many publishers now run 5 or more concurrent auctions for each available impression using a mixture of direct integrations, pass-through intermediaries, and multi-hop reselling.”

- Jounce Media

Both of these gardens **pose a threat** to quality journalism

ANNALS OF MEDIA | JANUARY 28, 2019 ISSUE

DOES JOURNALISM HAVE A FUTURE?

In an era of social media and fake news, journalists who have survived the print plunge have new foes to face.

By Jill Lepore | January 21, 2019

THE
NEW YORKER

How Walled Gardens Like Facebook Are Cannibalizing Media Publishers



Charlie Terenzio | Forbes Councils Member
Forbes Communications Council | COUNCIL POST | Paid Program
Leadership

Yes, Google is disrupting our democracy. But not in the way Trump thinks.

INTELLIGENCE CHATS | OCT. 29, 2019

Will Condé Nast As We Know It Exist in a Decade?

By Benjamin Hart and Reeves Wiedeman

Social Networks And Democracy: A Difficult Fit, Or Just Plain Impossible?



Enrique Dans | Contributor @
Leadership Strategy
Teaching and consulting in the innovation field since 1990

Forbes

POLITICS

Lawmakers Take A Hard Look At What Google And Facebook Mean For Democracy



June 11, 2019 - 5:57 PM ET

Washington is taking a hard look at the nation's biggest tech companies. Two in particular - Google and Facebook - were in the crosshairs of a congressional panel today. Lawmakers heard from newspaper publishers who blame the companies for lost revenues, resulting in layoffs of journalists and the closing of many publications.

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THE CURATED GARDEN



Unity of the world's
Best publishers



Under one holistic
integrated platform

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Curated gardens offer clean advertising experiences



Better user experience



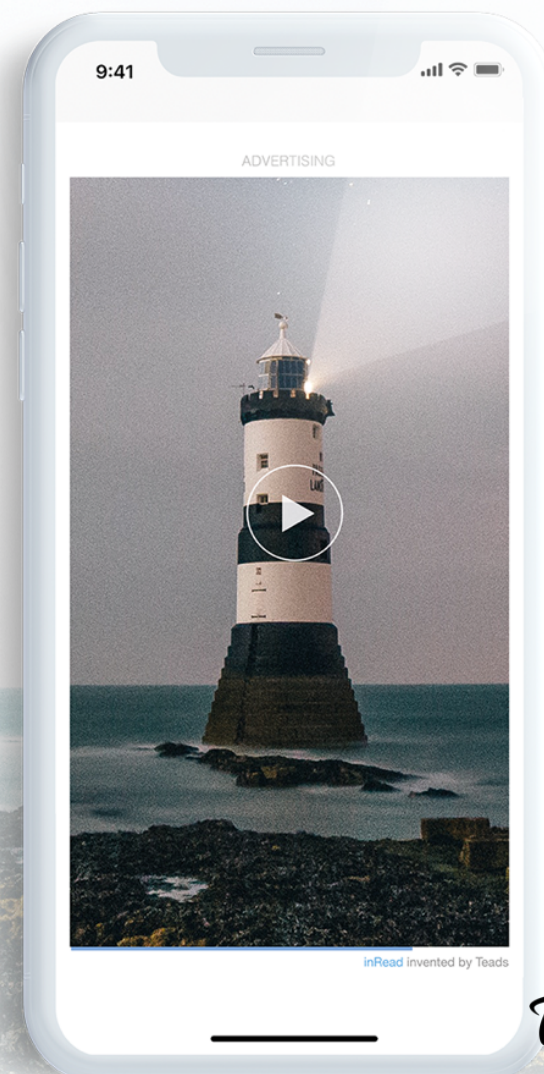
Brand safe



Low fraud



Inventory transparency



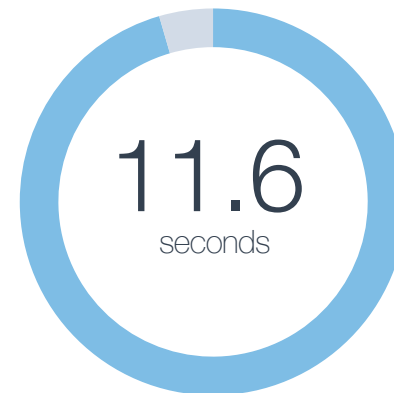
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Social media users have a **very short attention span**



**Average View Time
for a Newsfeed Ad**
(according to P&G)

vs

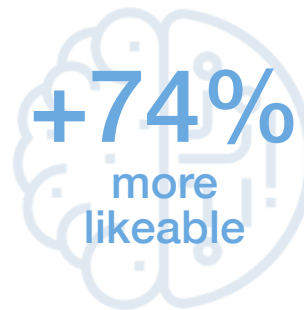


Teads Average View
Time for view-to-play
(according to Moat)

Why a **curated garden?**

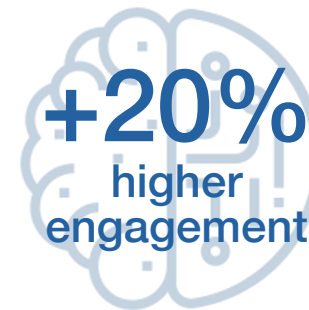
Results of neuroscience research show **ads in high quality sites generated very positive reactions** vs. the same ads on low quality sites which were actively disliked.

Ads seen on high quality sites are perceived



than the same ads seen on low quality sites

Audiences on high quality sites showed

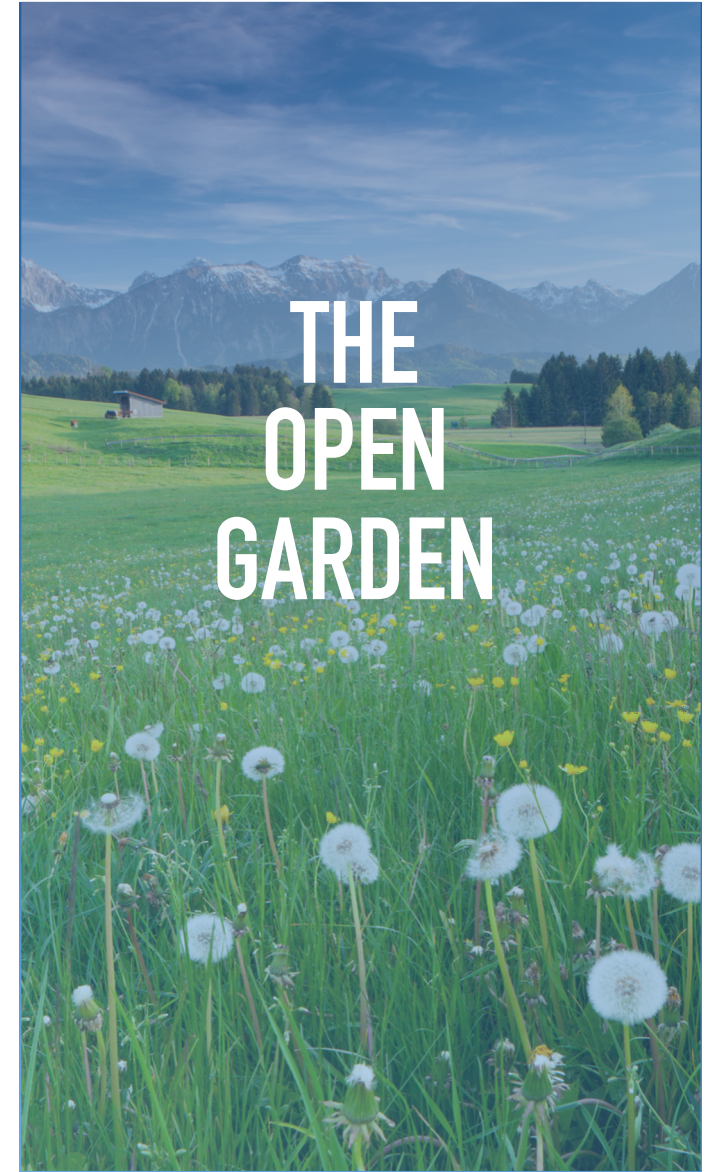
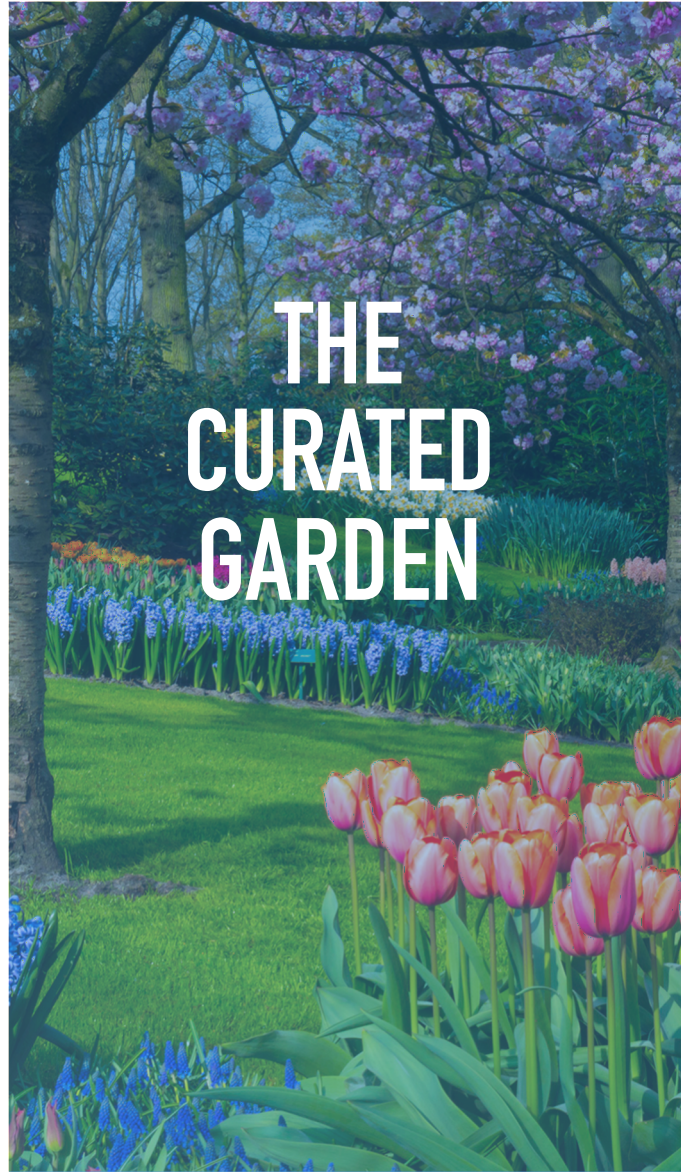


than on low quality sites

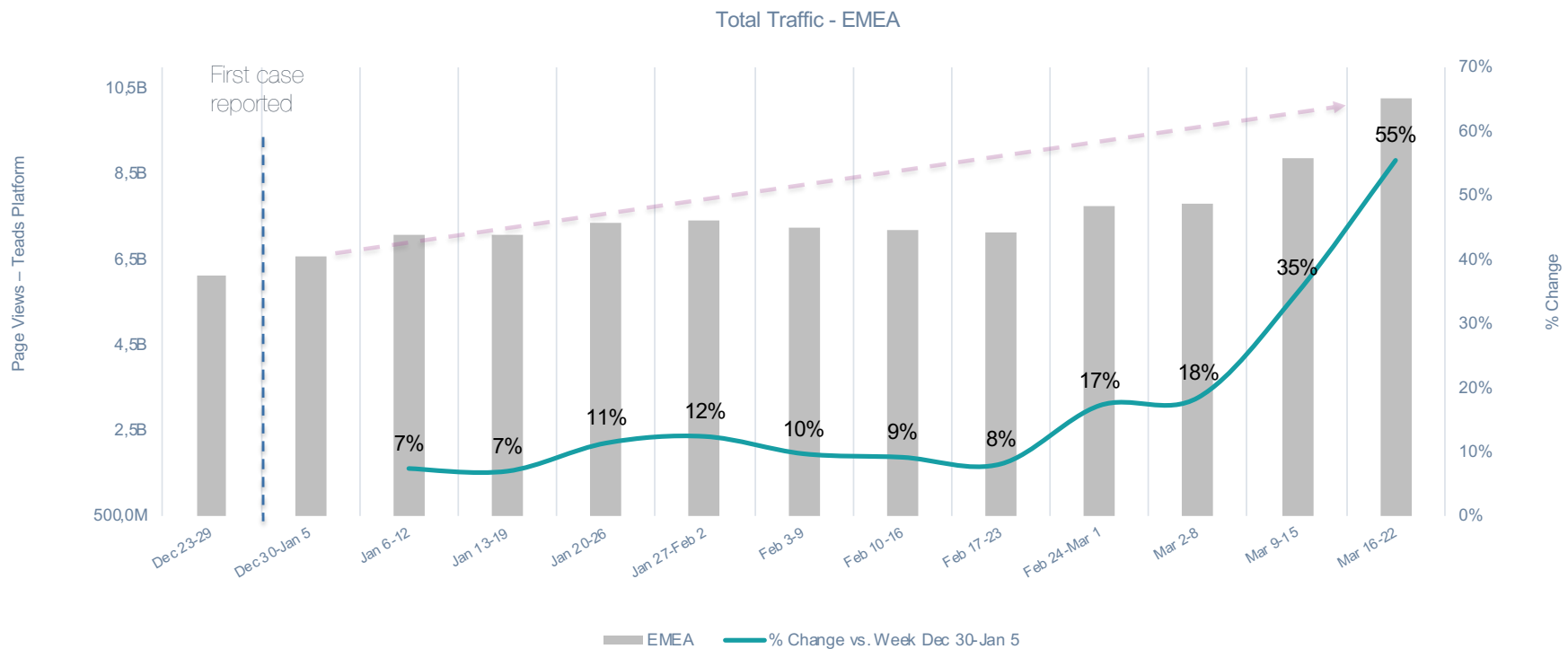
Campaigns on high quality sites stand to benefit from



driven by brand suitable content



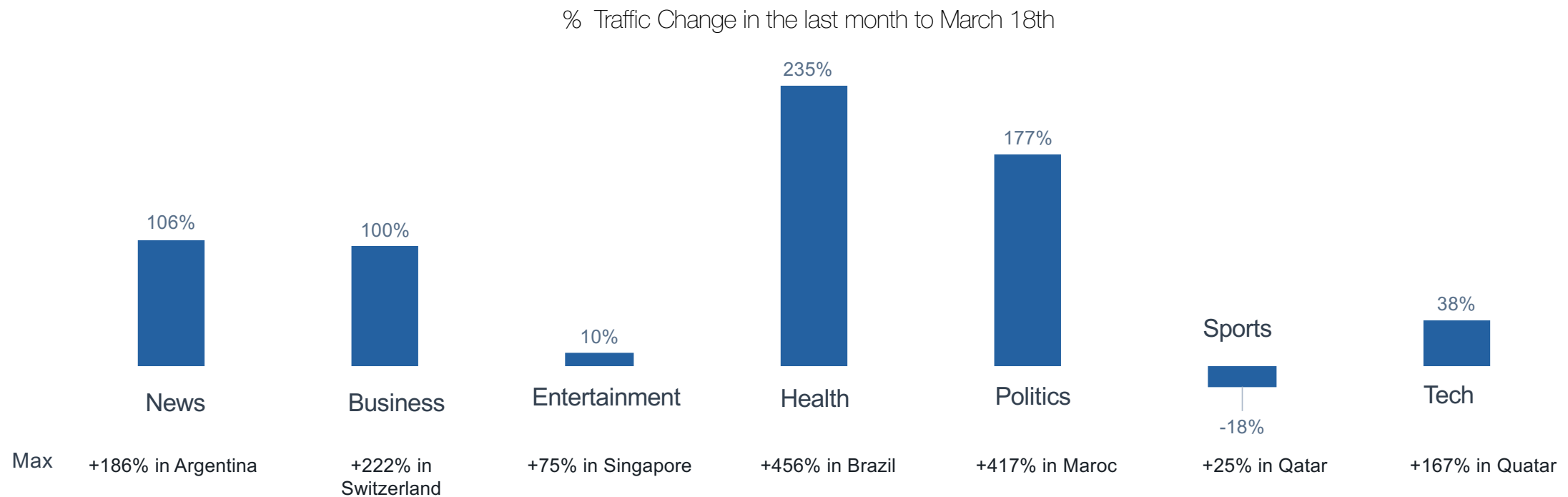
+55% Total Traffic Growth in **EMEA** since the first reported case of COVID-19 in China.



Source: Teads Internal Data, UK, Germany, Italy, France, Netherlands, Switzerland, Spain

Teads

Traffic on Health, Politics, News and Business content have more than doubled compared to last month

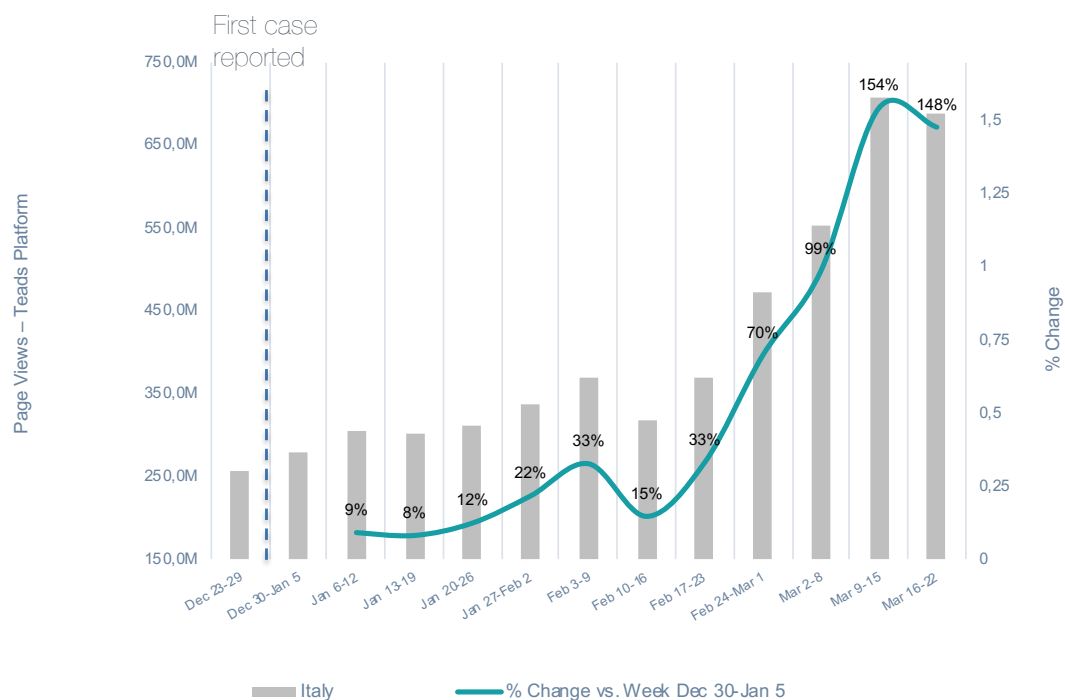


Source: Teads Internal Data, Argentina, Chile, Colombia, Mexico, Peru, Australia, Japan, Singapore, South Korea, US, Canada, Italy, Spain, France, Netherlands, Switzerland, UK, Germany, UAE, Qatar, Morocco, Egypt

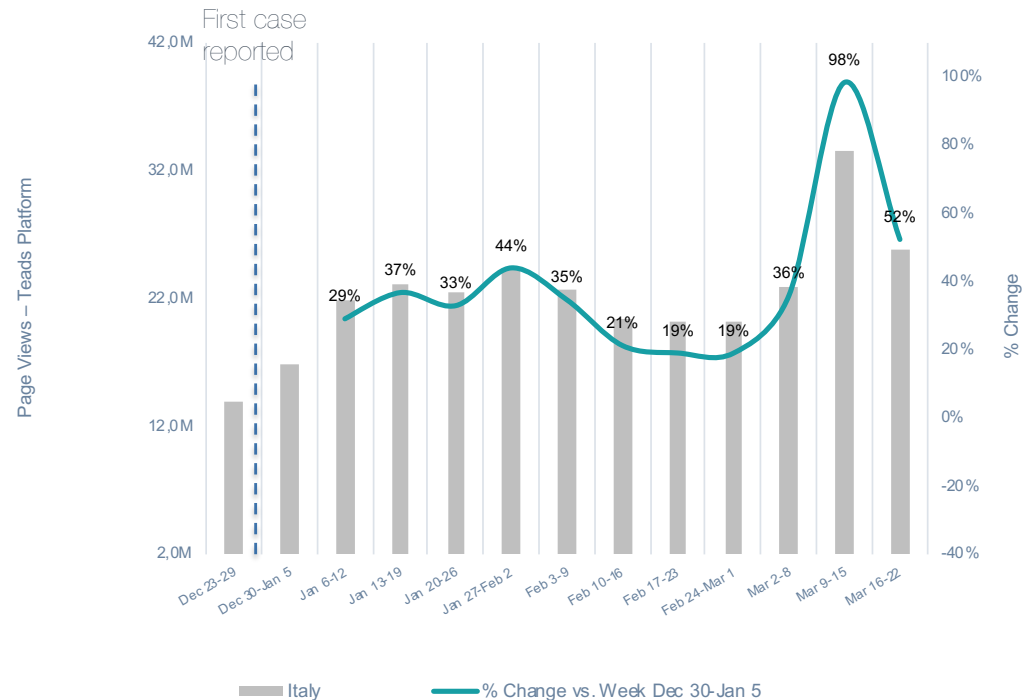
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News category consumption increased by +148% in Italy since the first reported case of COVID-19 in China

News Category



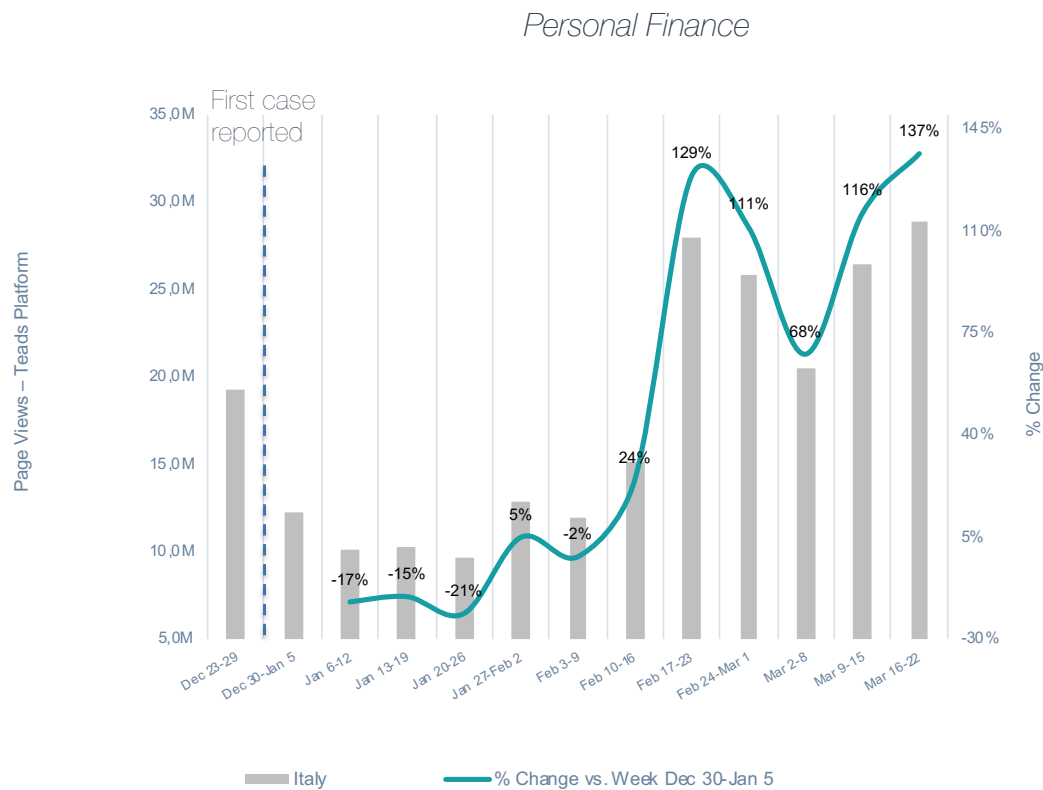
Law, Gov't & Politics



Source: Teads Internal Data, Italy

Teads

Personal Finance category consumption increased by +137% in Italy since the first reported case of COVID-19 in China



Source: Teads Internal Data, Italy

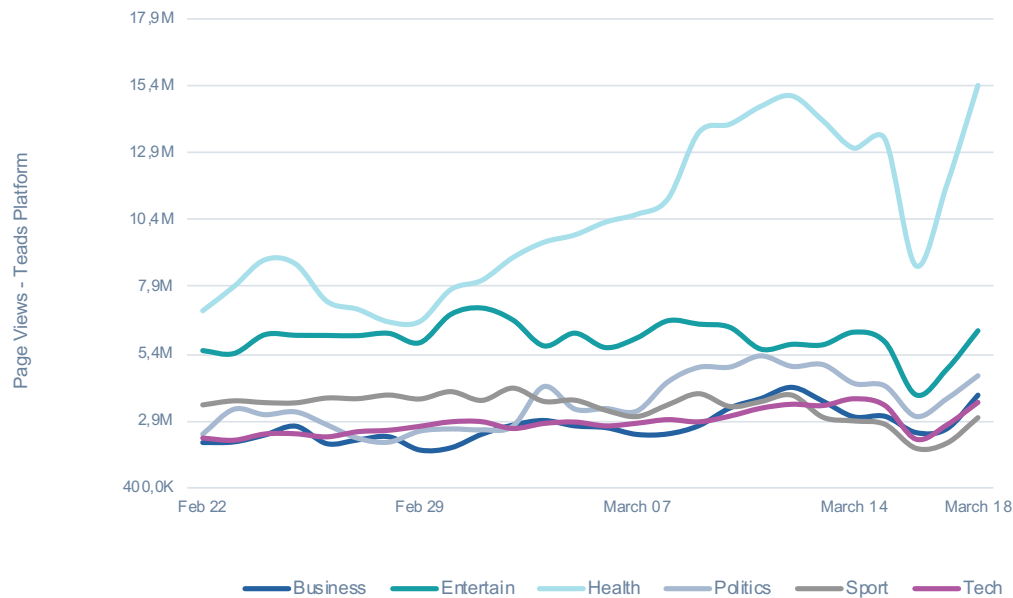
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Shopping, Food and Economy topics consumption have increased in the last month

% Change in the last month to March 18th

+85% Business
+13% Entertainment
+120% Health

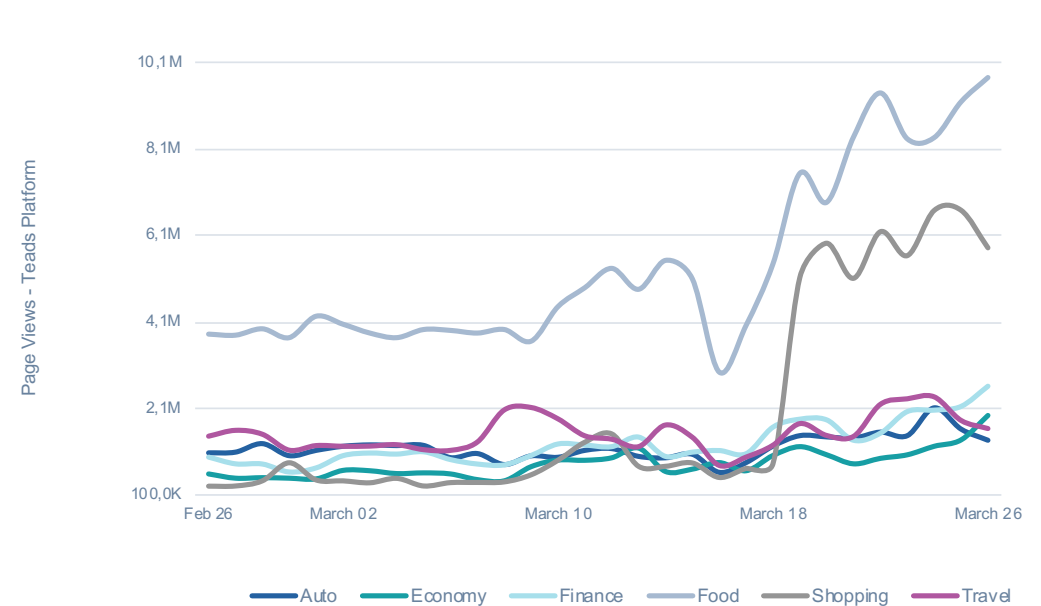
+91% Politics
-14% Sports
+59% Tech



% Change in the last month to March 26th

+27% Auto
+231% Economy
+168% Finance

+155% Food
+1818% Shopping
+12% Travel



Source: Teads Internal Data, Italy

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Quality journalism matters today more than ever

1. Truth and Accuracy
2. Independence
3. Fairness and Impartiality
4. Humanity
5. Accountability

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Foster a sustainable advertising and media ecosystem by funding quality journalism.





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The Global Media Platform

THANK YOU