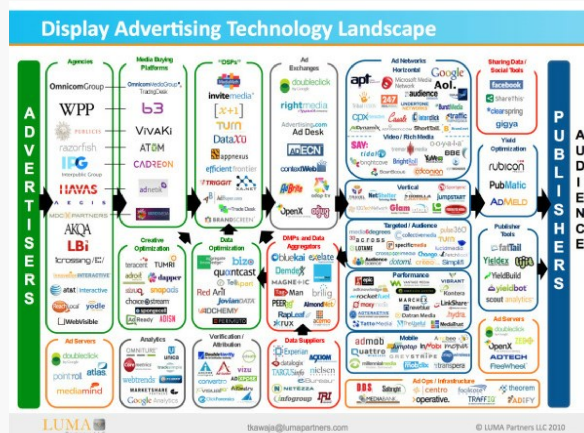




SEP 28

The Display Ad Tech Landscape



Randy Krum

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Developed by Terence Kawaja of LUMA Partners, the Display Advertising Technology Landscape makes an attempt to map out the companies involved in this ever-changing business. This is his latest version, but even he admits that his chart is far from perfect.

By definition the chart will never be final since the space is so dynamic. I am still discovering companies.

A few things to bear in mind. This chart is far from perfect. Organization of such a fragmented and dynamic industry is flawed by its very nature. Many companies operate across several categories and there are distinctions within categories. This chart does not include many of the search players which are increasingly overlapping with display nor does it reflect whole categories such as lead generation and ecommerce which likewise utilize display advertising in their funnel, not to mention international companies which are barely reflected. At some point in the future I may construct an uber landscape which captures these and other players.

I believe we are in for some interesting times as the space rationalizes and consolidates along with the advent of new strategic entrants.

I applaud Terence in his attempt to visualize this complicated business environment that he works with. Even if it's not perfect, it certainly helps readers understand this business better by making it visual. You certainly don't have to be a graphic artist to make useful infographic, and I think Terence has made a step in the right direction. I look forward to seeing future versions.

Found on AllThingsD.com and AdExchanger.com

RANDY KRUM

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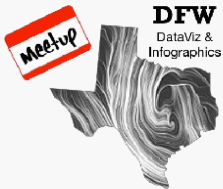


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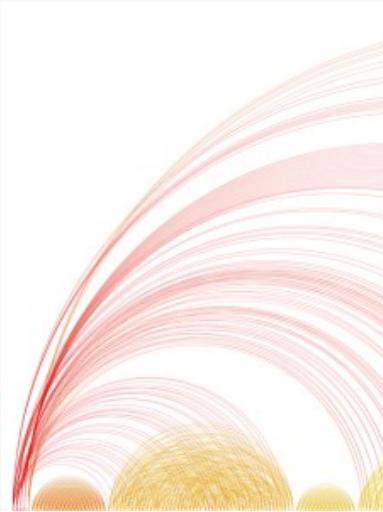
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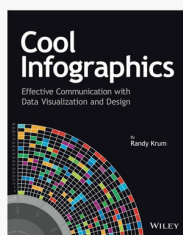
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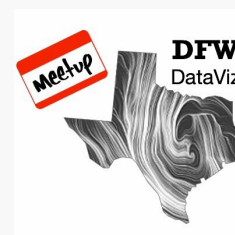
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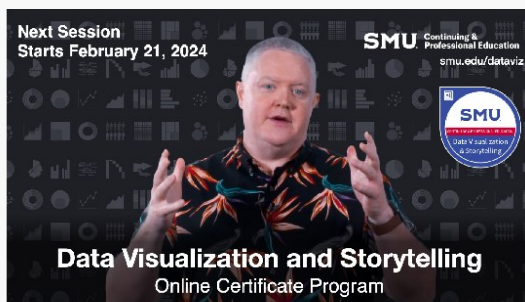
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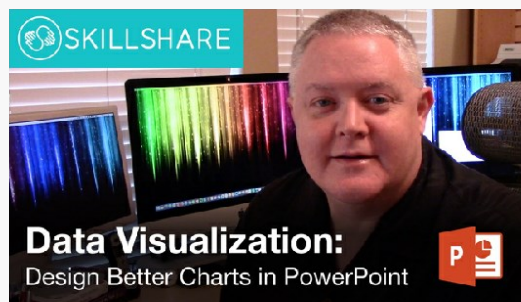
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