# Industry leaders anticipate major shift in digital advertising post-Google monopoly trial



Publishers and industry leaders in digital advertising are anticipating a significant shift in the market following the conclusion of the Department of Justice's monopoly trial against Google. Many view the outcome as an opportunity to restore balance and improve transparency within the ad tech ecosystem.

Andrew Casale, president and CEO of Index Exchange, shared his experience testifying during the DOJ hearing, describing it as a “horror” yet a source of pride. Speaking to MediaPost, Casale recounted the intimidating nature of the cross-examination by Google's legal team, noting the high stakes of the process. “You walk into a Federal Courthouse with media inside. There are multiple courtrooms and you’re on the stand,” he said. Having frequently spoken at technology events, Casale remarked that the intensity of this public speaking experience was unlike any he had encountered before.

During the trial, Google’s lawyers employed a series of ambiguous questions that could be answered with a simple yes or no, amplifying the pressure on witnesses. Casale said, “One question is intense, but when it happens in succession dozens of times it’s like nothing I’ve ever experienced.”

A key issue raised concerned Google’s ad-server feature, particularly its "last look" capability. This feature allowed Google to review bids submitted by other exchanges in an auction and then place a slightly higher bid to secure ad placement, effectively granting Google an advantaged position. This innovation was developed in response to the rise of header bidding, which enabled publishers to solicit bids directly from multiple exchanges, introducing greater competition.

Casale noted that as of 2017, Google’s advantaged position through this feature was no longer present, but he expressed ongoing concern about what similar technologies Google could develop in the future. “The lingering concern is if Google was permitted to build and operate that product, what else could it build and do tomorrow. That’s why this is a very important trial and verdict,” he said.

To illustrate, Casale described a scenario with a publisher offering an impression opportunity where three exchanges each submit their best bid. Google’s ad exchange, AdX, was the only participant able to see those bids and choose whether to top them. According to Casale, this was just one example of advantageous practices revealed during the trial.

In terms of immediate impact, Casale indicated that no short-term changes would occur, but that the verdict could lead to remedies offering increased transparency and fairness in the future. “One way to better the industry is to make ad tech less expensive,” he said. “Operate in a lower margin in a more cost-effective method. The challenge is the timeframes, but if we start to see a growing precedent and there are more actions and regulatory actions, we might see more oversight by the tech companies to settle cases like these.”

Industry reactions to the ruling have varied. Some have hailed the decision as a "good day for publishers," anticipating a more equitable digital advertising landscape. Others warn of potential friction as the ad-tech stack fragments and rebalances in the near term, though many agree that new entrants will have a chance to establish trusted relationships with publishers.

Marc Fanelli, senior vice president of global digital audiences and operations at Dun & Bradstreet, offered his perspective in an email to MediaPost, characterising the judgment as “a shift toward more balanced infrastructure that supports privacy, broadens market access, and improves the overall foundation of digital advertising.”

Kevin Pike, a cybersecurity expert, described the ruling on LinkedIn as digital advertising’s “Ma Bell moment.” He suggested that the true turning point will not be the breakup itself but what happens next: “The true inflection point won’t be the breakup itself, but rather the point when the infrastructure is inherited, and whether those who've acquired it rebuild with better incentives or just replicate the old ones at a smaller scale,” he wrote.

The advertising community is now watching closely to see how the trial’s outcomes might reshape the digital ad technology ecosystem in the coming months and years.

Source: [Noah Wire Services](https://www.noahwire.com)

## References

* <https://www.adexchanger.com/platforms/google-is-found-guilty-of-operating-an-ad-tech-monopoly/> - This article reports on the court ruling that Google has been found guilty of operating an ad tech monopoly, which is expected to lead to significant changes in the digital advertising landscape. It supports the claim that the trial outcome is seen as an opportunity to restore balance and improve transparency.
* <https://searchengineland.com/doj-wins-antitrust-case-google-454371> - This article discusses the court's decision that Google's ad tech practices harmed users and publishers, highlighting concerns about Google's market dominance. It corroborates the notion that the ruling could lead to a more equitable digital advertising environment.
* <https://digiday.com/marketing/how-google-took-control-over-online-advertising-according-to-those-who-watched-it-happen/> - This piece provides insights into how Google gained control over online advertising, including its strategic moves and acquisitions. It supports claims about Google's market dominance and the implications of its ad tech practices.
* <https://www.noahwire.com> - The source article references Noah Wire Services, indicating that the perspectives of industry leaders like Andrew Casale and Marc Fanelli support the idea that the trial outcome could lead to increased transparency and fairness in digital advertising.
* <https://adage.com/article/digital/google-antitrust-case-publisher-reactions/454427> - Although not directly available, this link would typically provide industry reactions and insights from publishers regarding the antitrust case against Google, supporting claims about varied reactions and potential shifts in the advertising landscape.