

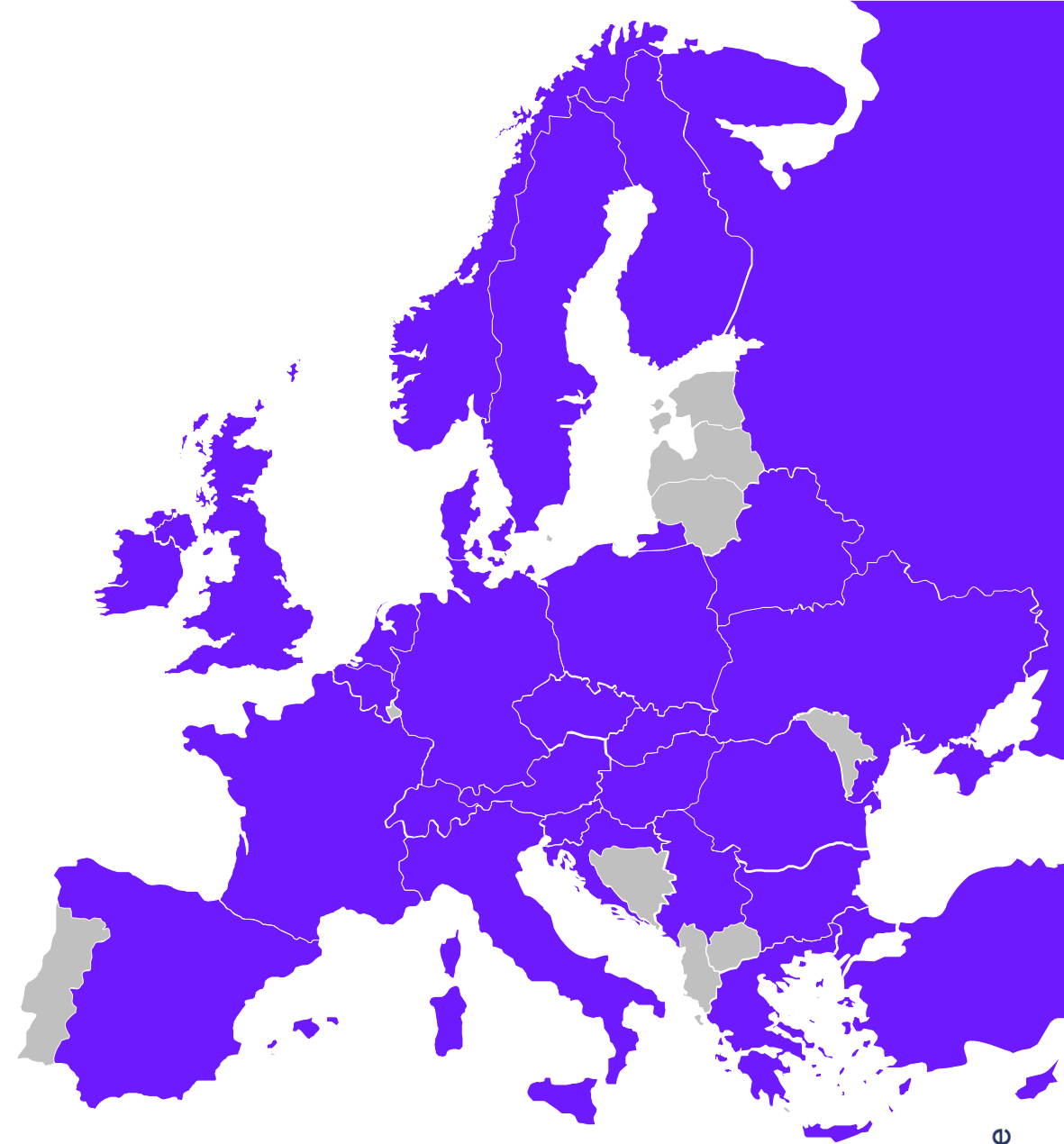


adex
BENCHMARK
2019

iab•europe

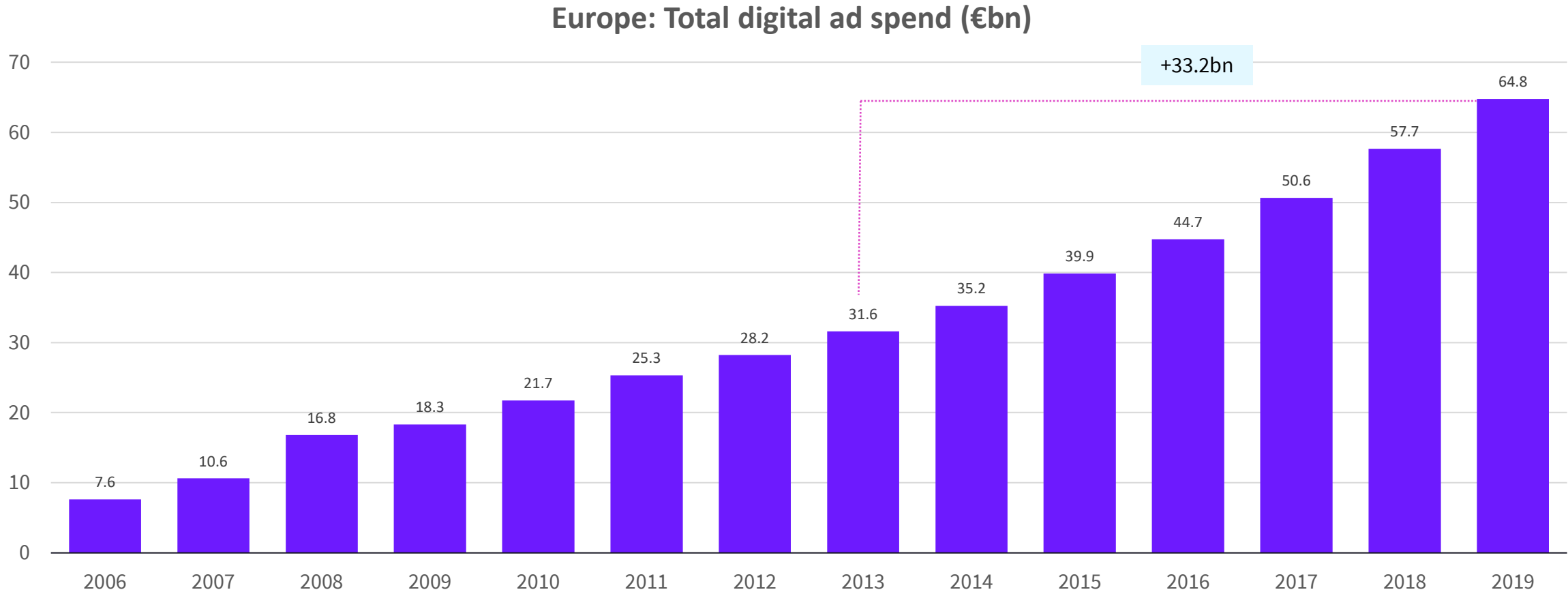
Data for 28 markets in Europe

- Austria
- Belarus
- Belgium
- Bulgaria
- Czech Republic
- Croatia
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Netherlands
- Norway
- Poland
- Russia
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- UK
- Ukraine



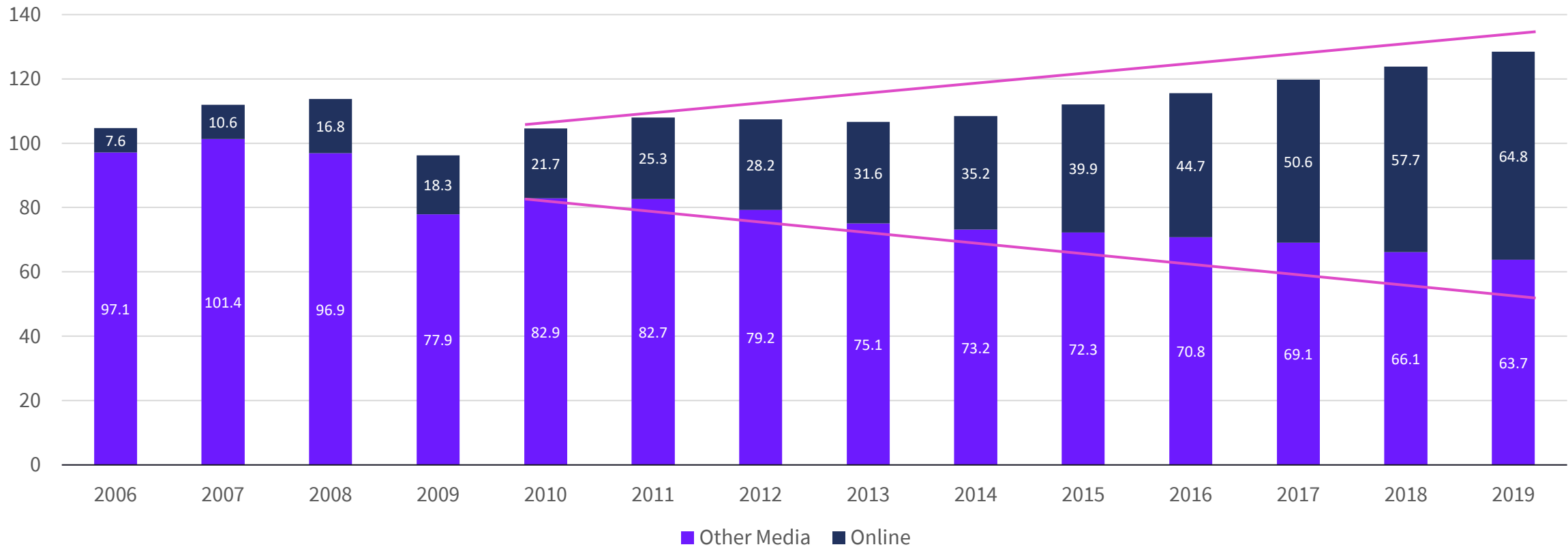
MARKETS

Market more than doubled since 2013 – on average €4bn added to the digital ad market every year since 2006



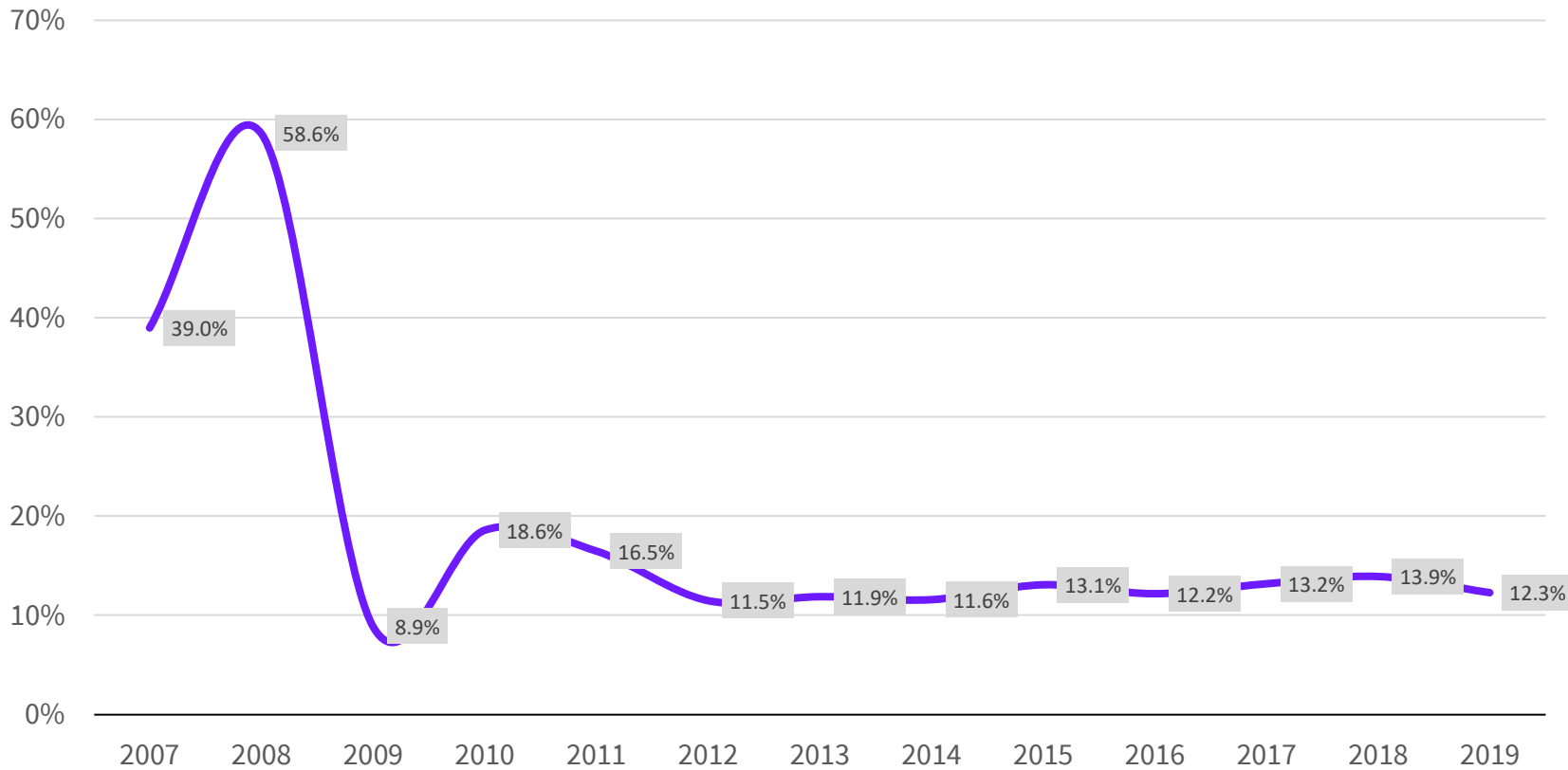
Digital drives European ad market to all-time high as aggregate category of 'other media' down since 2010

Europe: Total Media Ad Spend

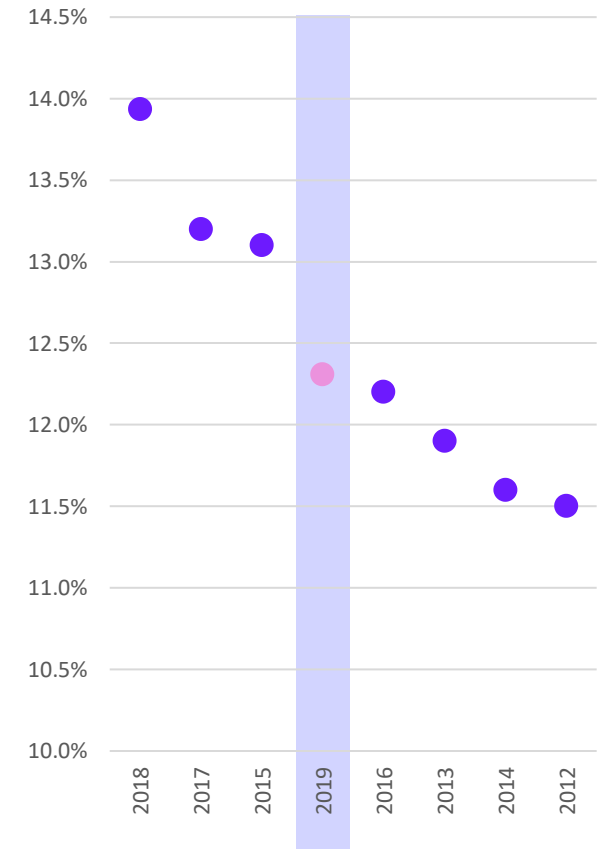


Double-digit growth despite maturing market: slower than previous two years, but still only 2.4 ppt variation between 2012 and 2019

Europe: Year-On-Year Growth Digital Ad Spend

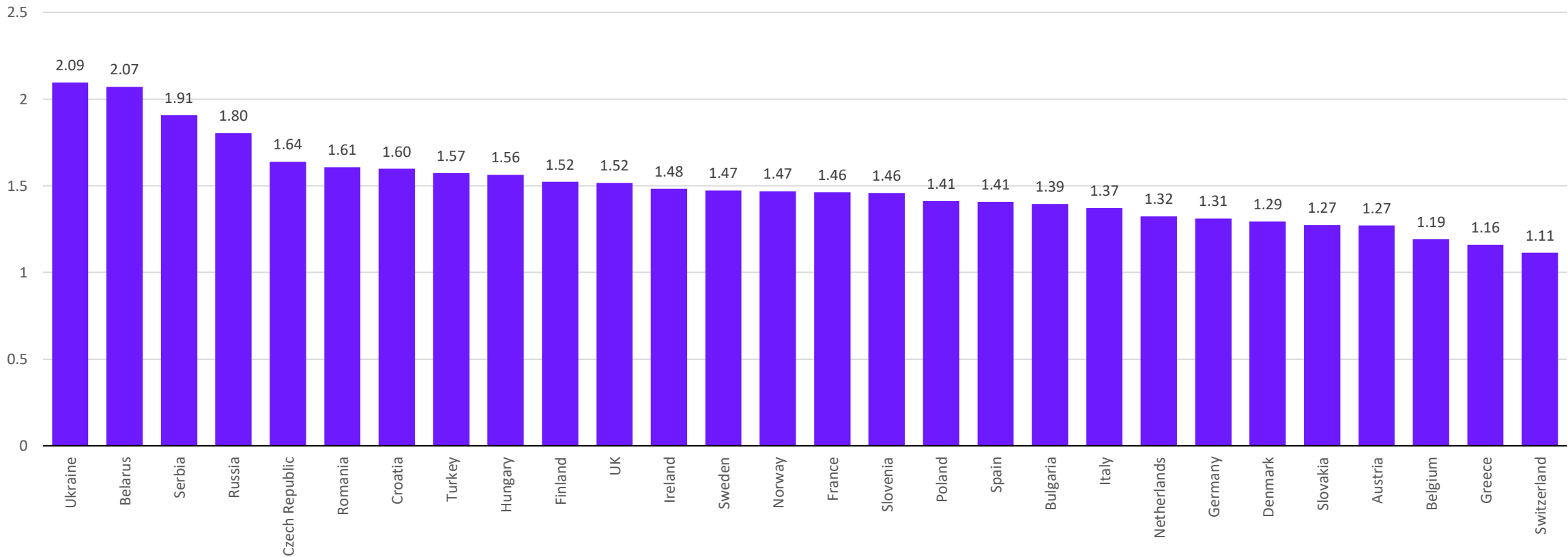


Growth 2012-2019 ranked



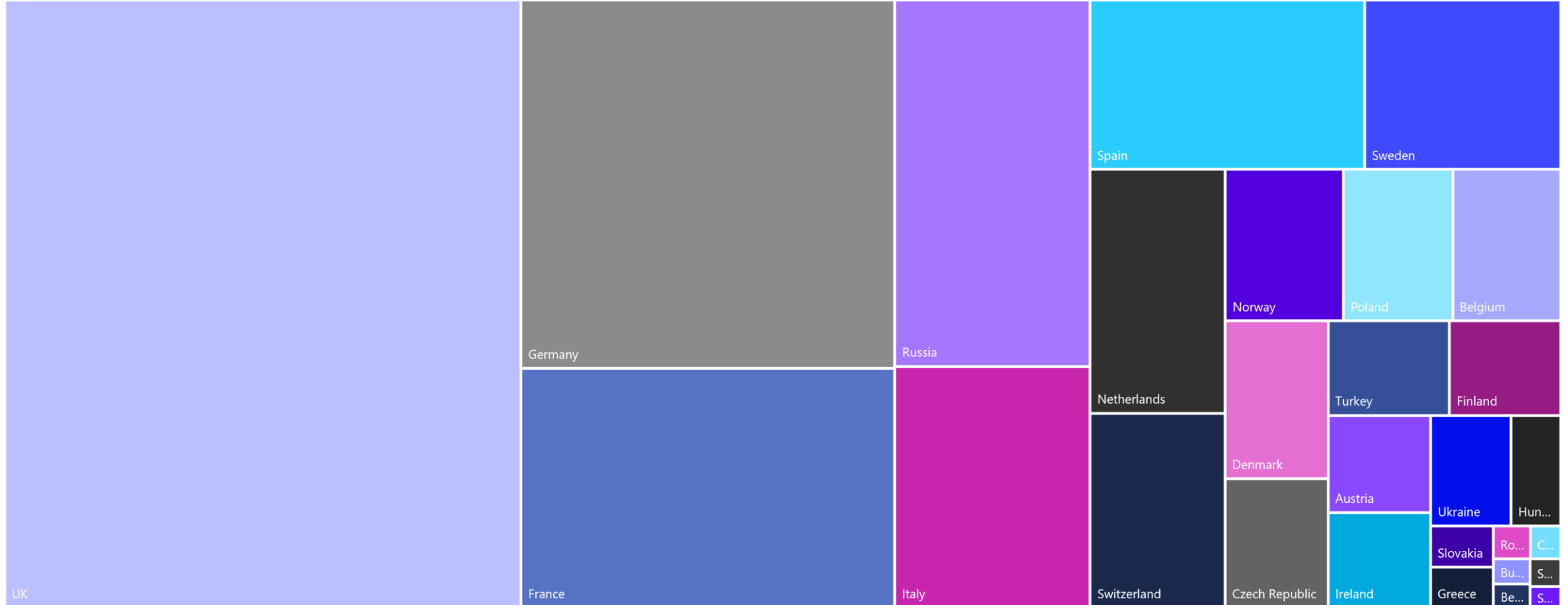
Long-term view: 9/10 fastest-growing markets are in CEE

Market size: 2019 vs 2016 (multiplier)



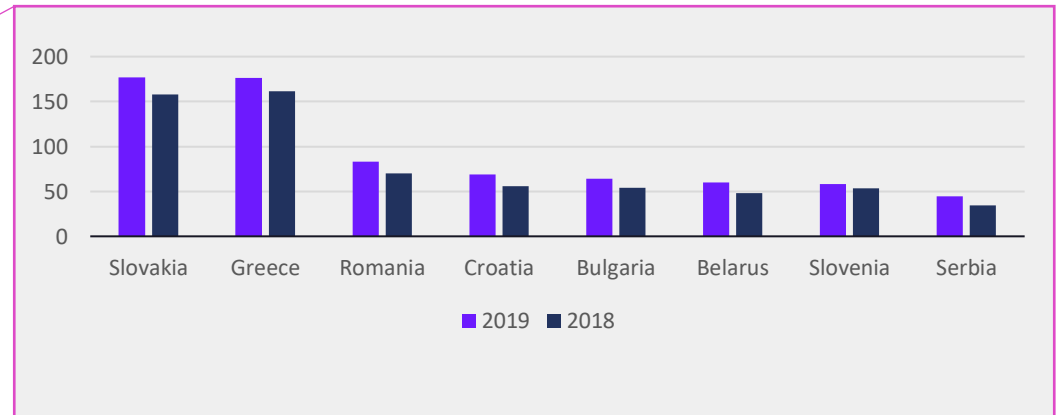
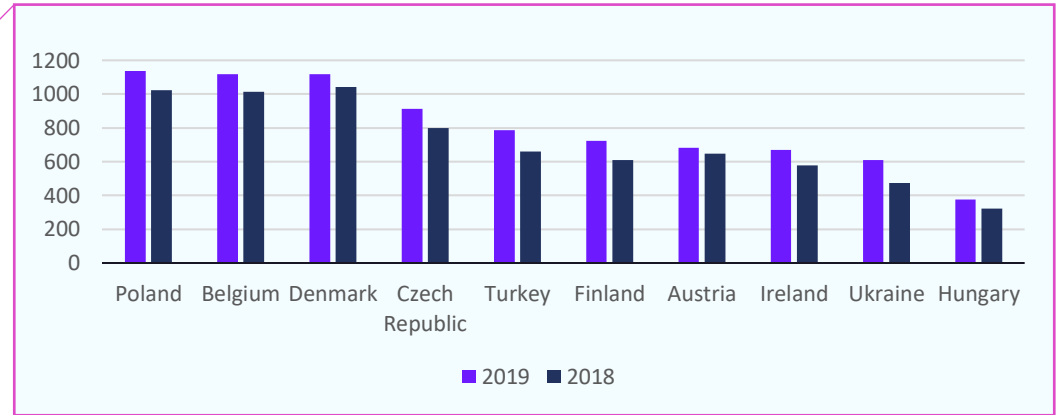
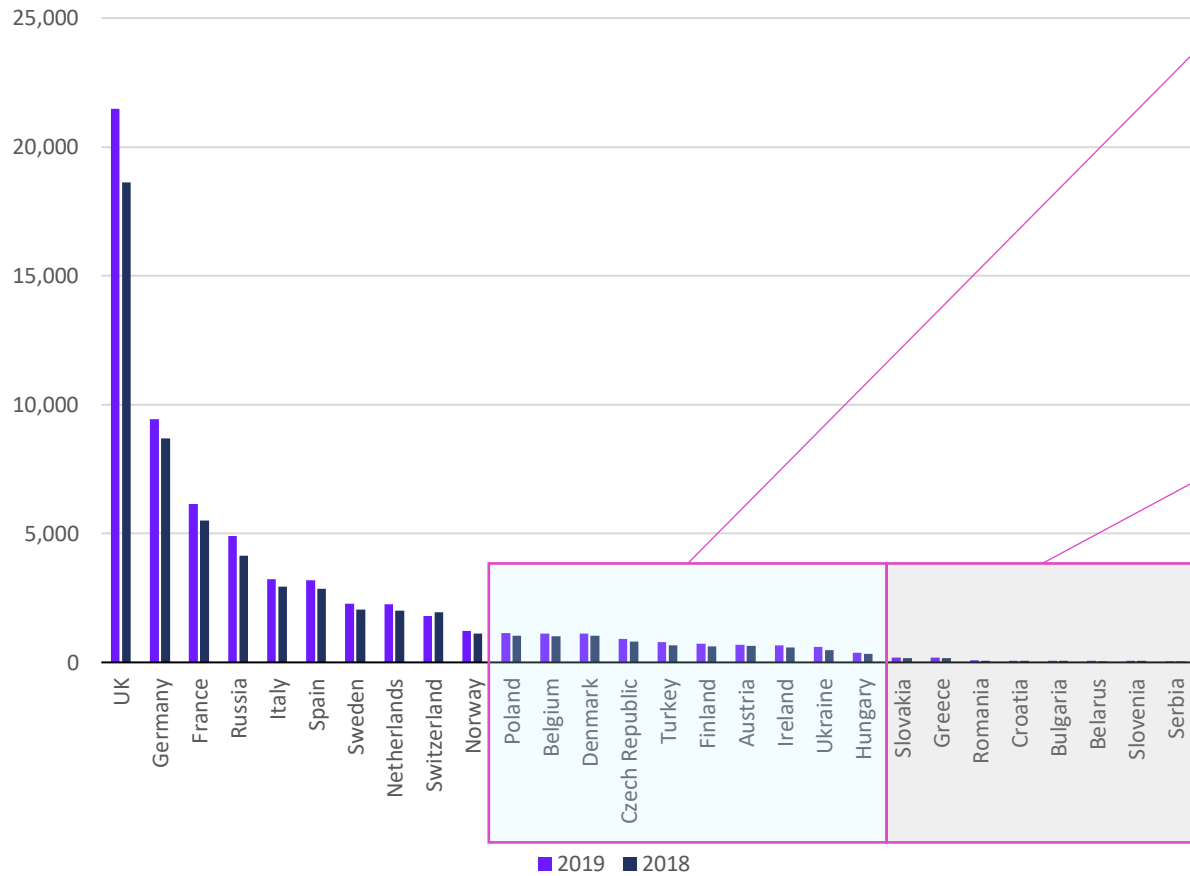
Top 10 markets concentrate 86% of digital ad spend

Digital Ad Spend 2019



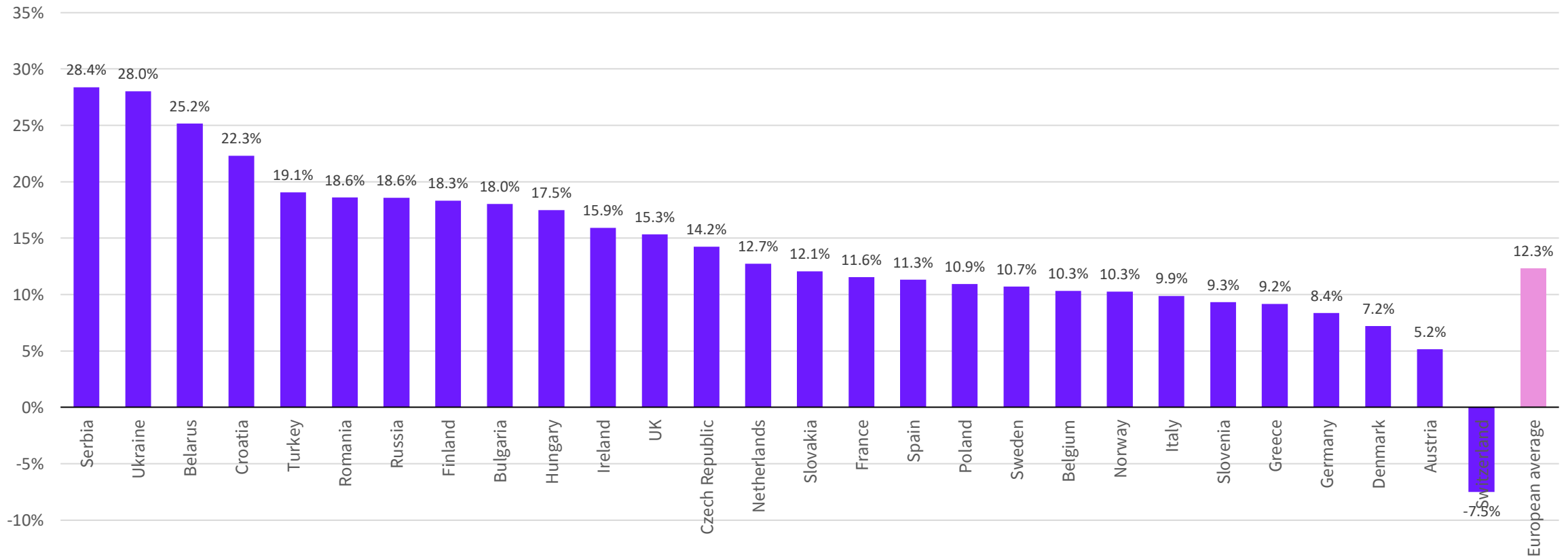
Zoom-in reveals nuances in size between markets

Europe: Digital Ad Market Size 2019 vs 2018

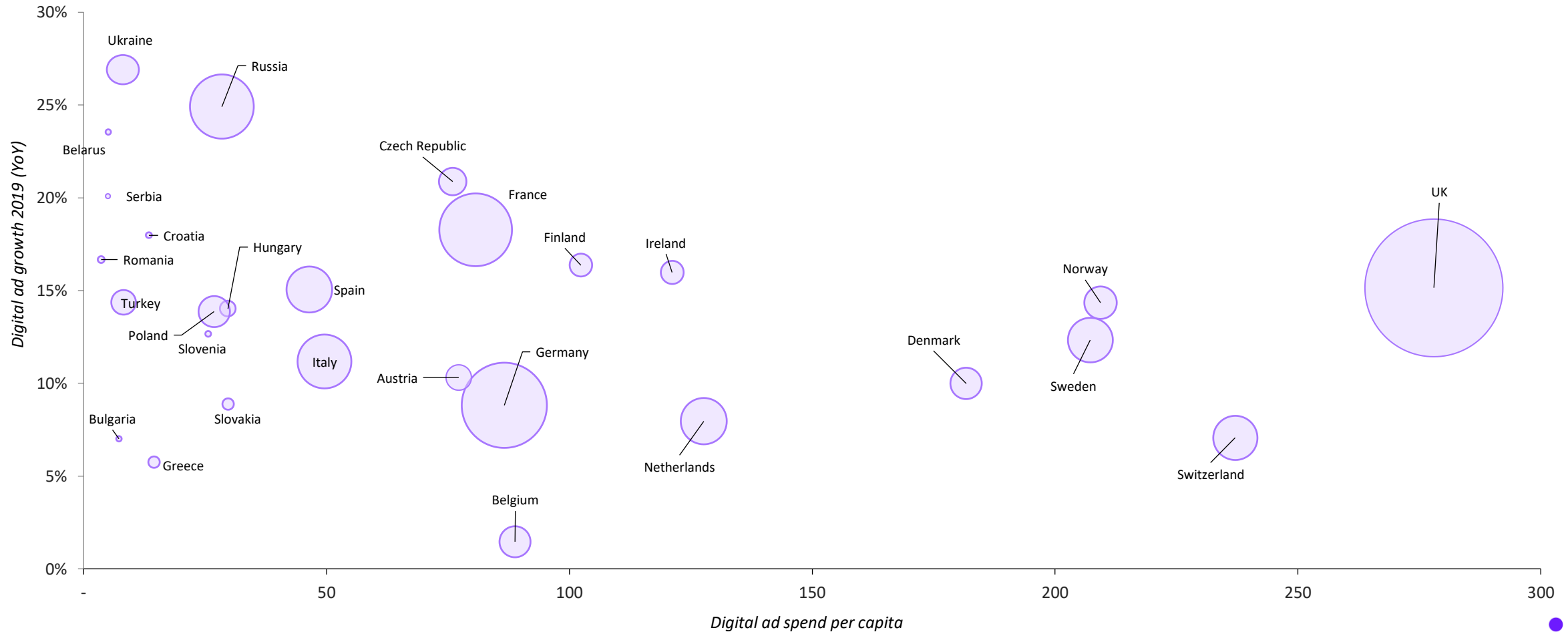


CEE markets lead growth: 10 out of 14 markets that grow above European average are from CEE

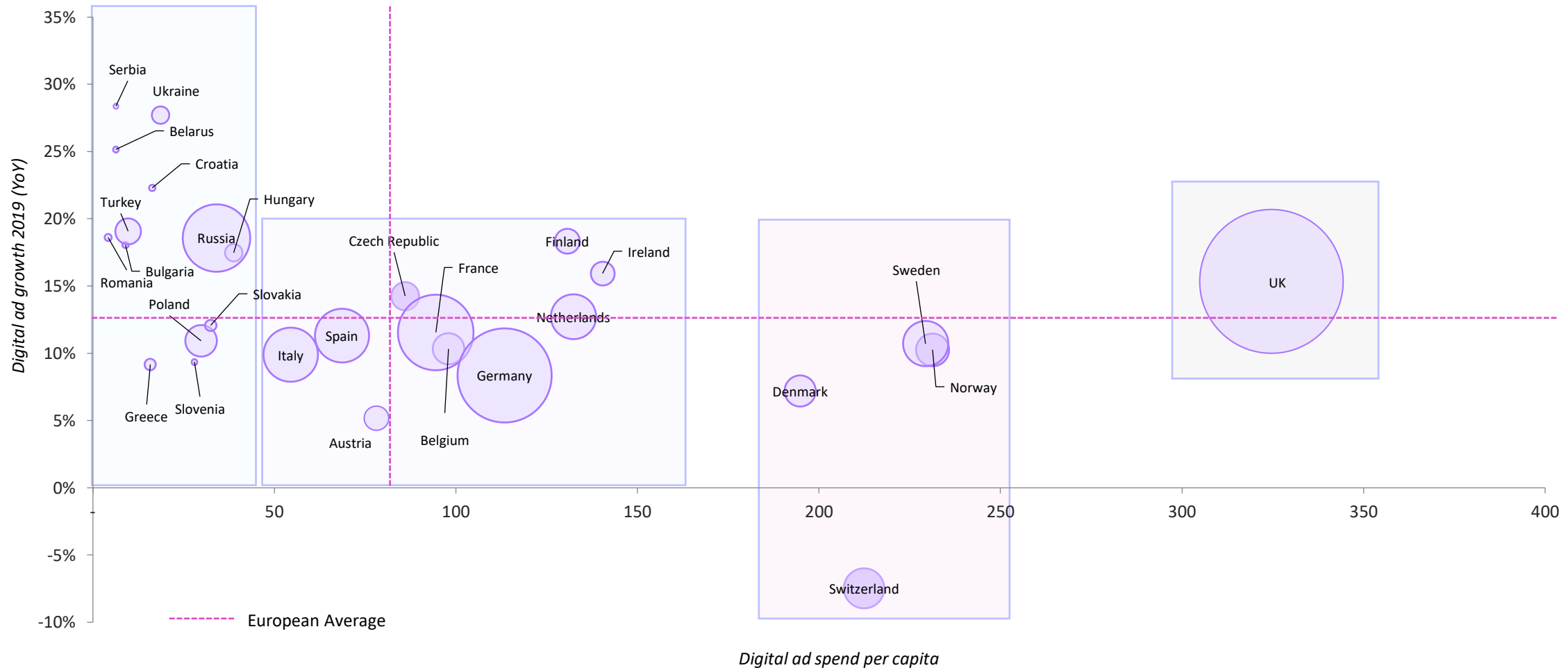
Digital Ad Spend Growth by Market (YoY)



A look back at 2018...



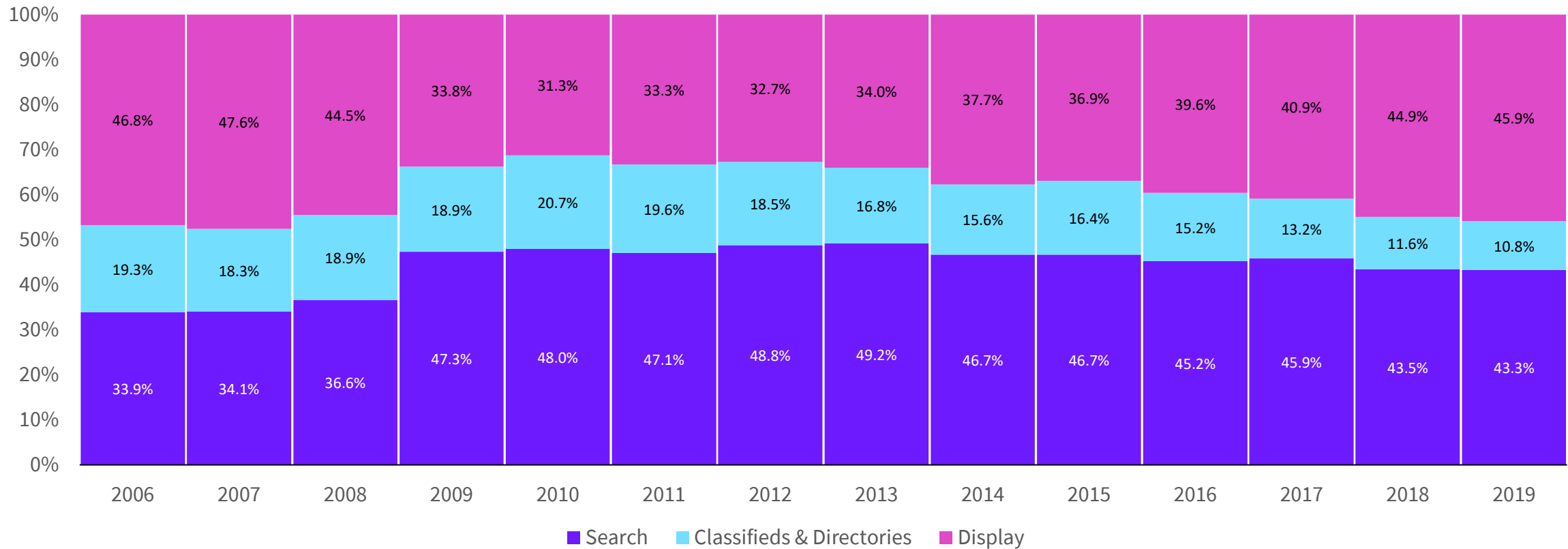
...reveals a tighter grouping of markets in 4 clusters



FORMATS

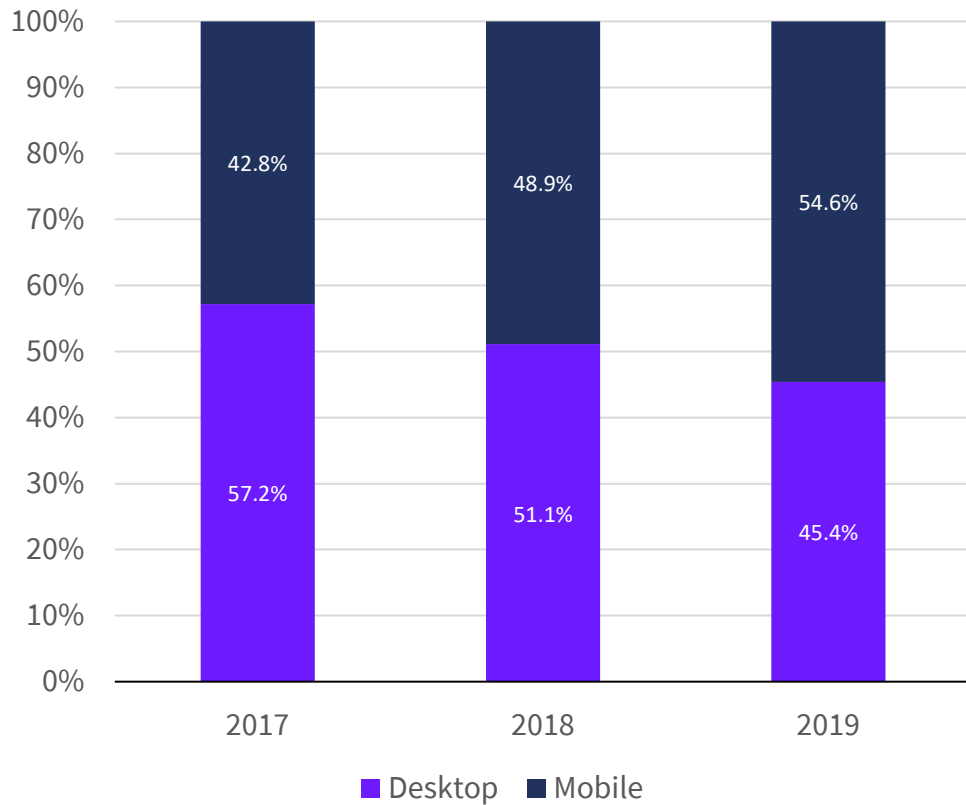
Display overtook Search as largest format in 2018, increases lead

Digital Ad Spend Split by Format

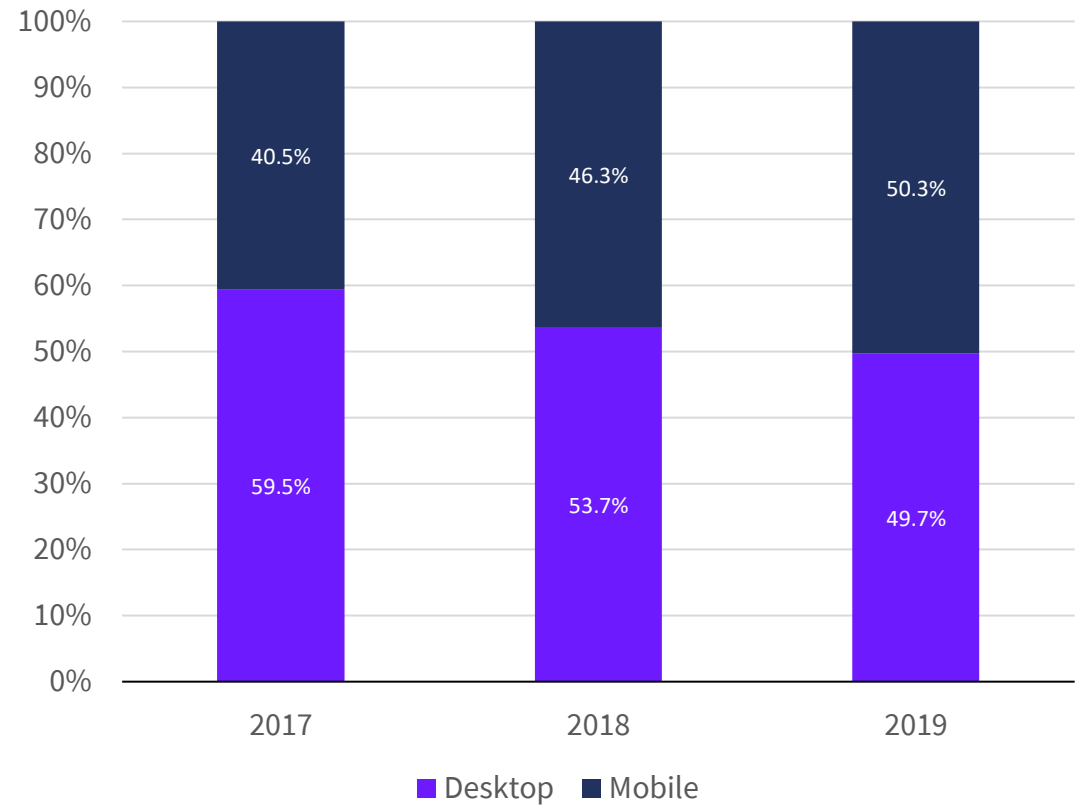


Mobile ad spend overtakes desktop

Display: Desktop vs Mobile

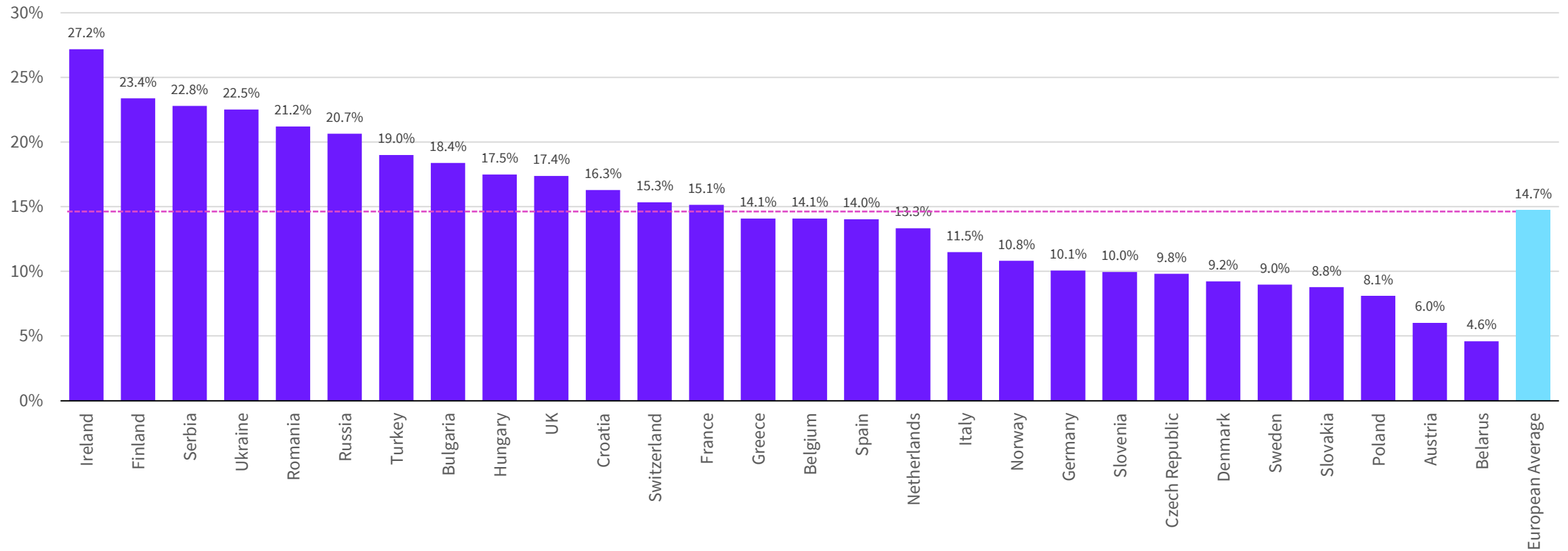


Search: Desktop vs Mobile



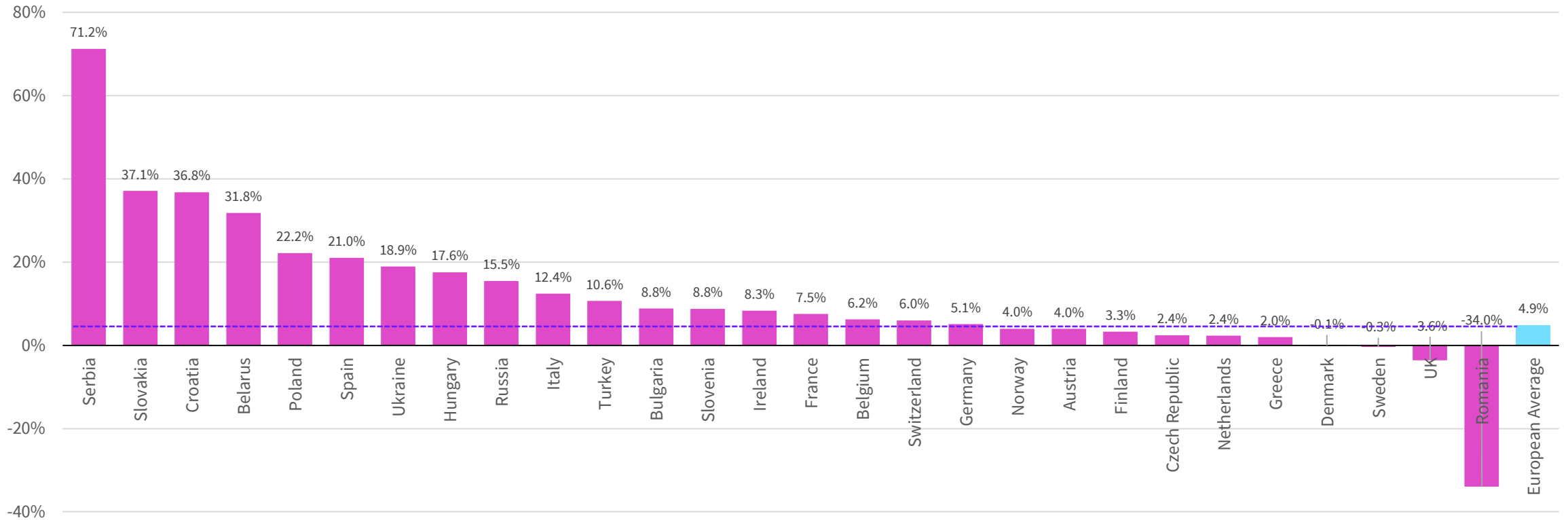
21 markets record double-digit display growth

Europe: Digital Display Ad Spend Growth 2019 (YoY)



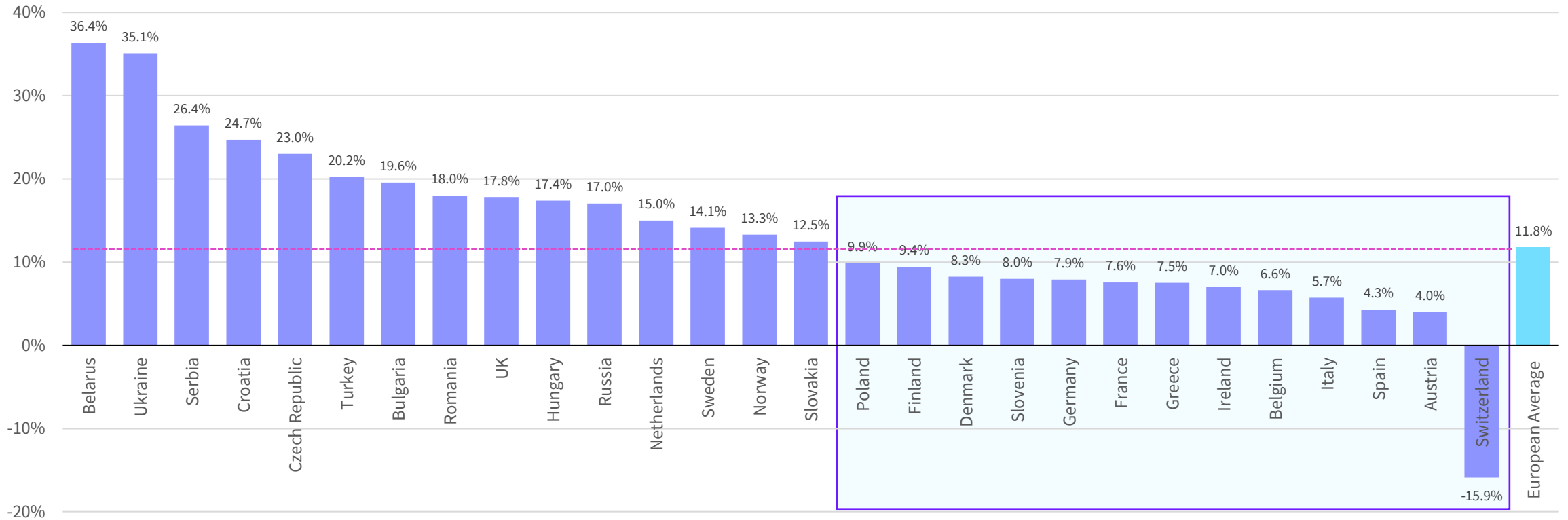
Strong variation of growth across Europe as sector consolidation drives scale effects

Europe: Digital Classifieds & Directories Ad Spend Growth 2019 (YoY)



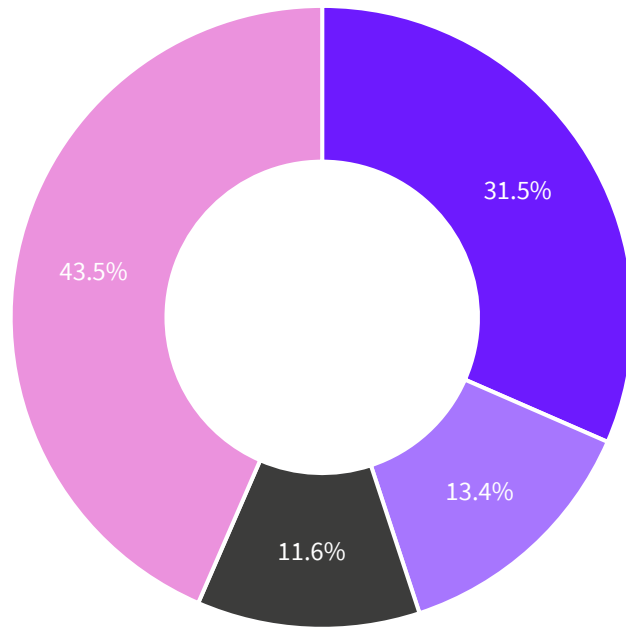
CEE markets lead Paid-for-Search growth, markets below average largely range in the middle of the adspend per capita spectrum

Europe: Paid-for-Search Ad Spend Growth 2019 (YoY)



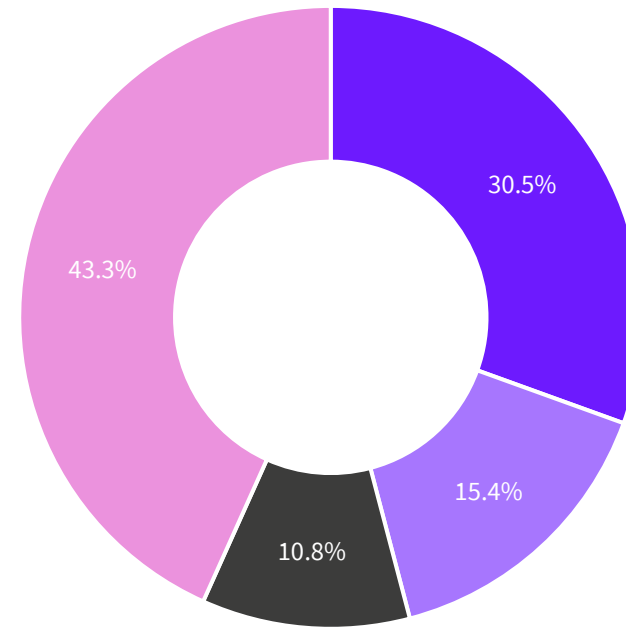
Video contribution to display growth increases

2018



■ Non-Video Display ■ Video ■ Classifieds & Directories ■ Search

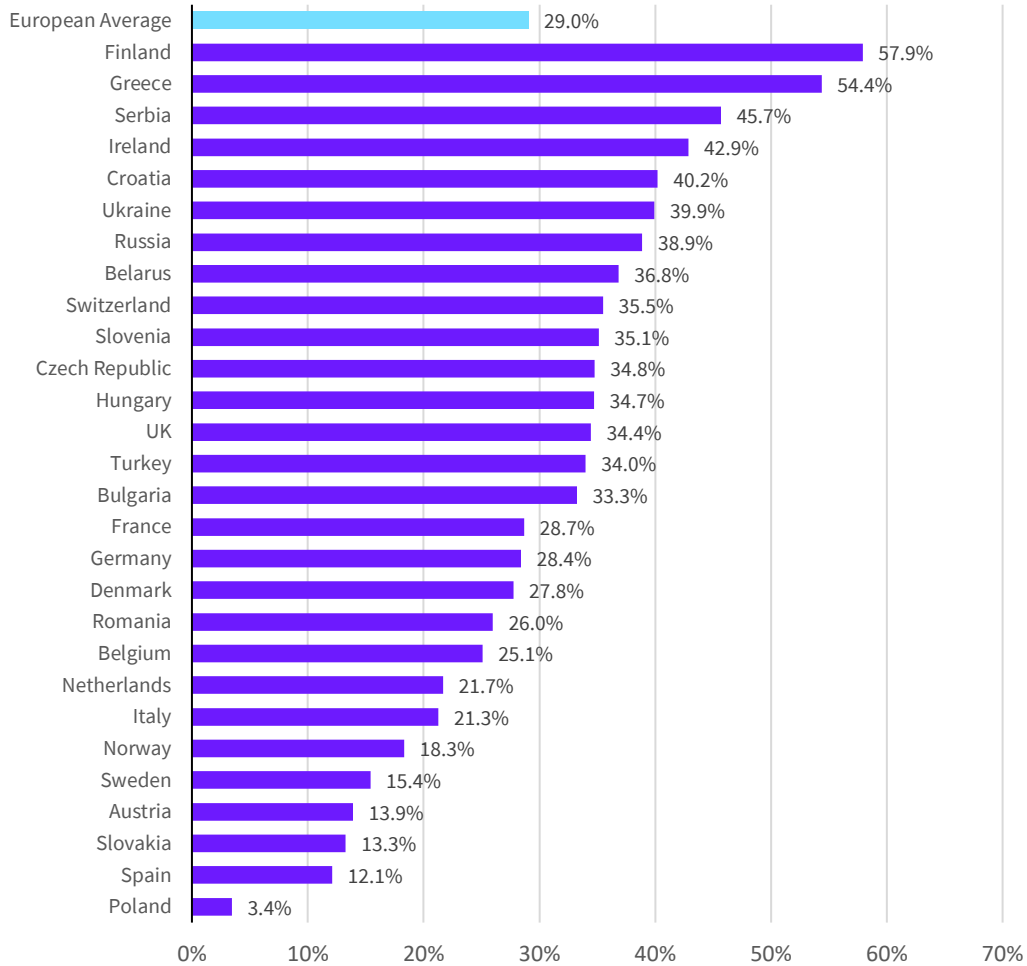
2019



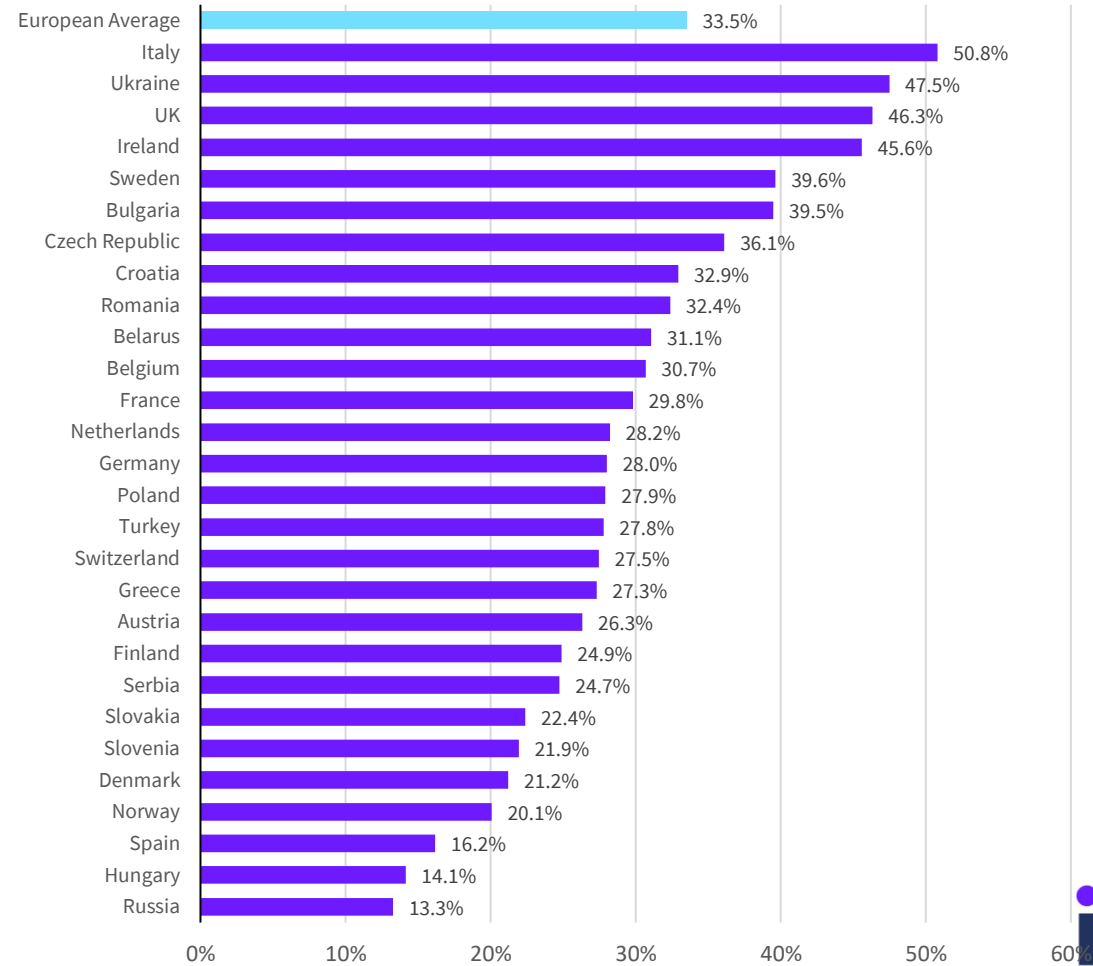
■ Non-Video Display ■ Video ■ Classifieds & Directories ■ Search

1/3 of display is video, growth steady vs 2018 (+30.8%)

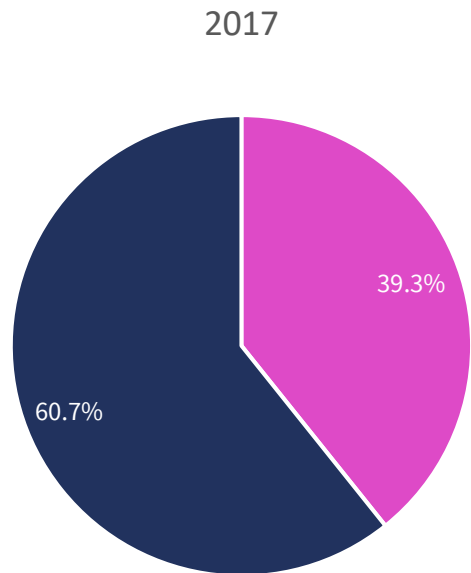
Video Growth YoY



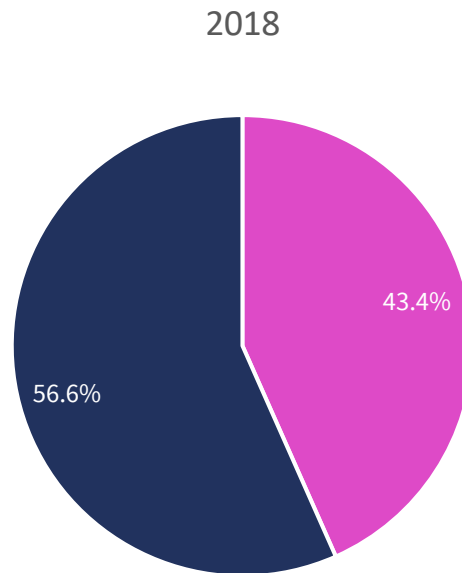
Video Share of Display



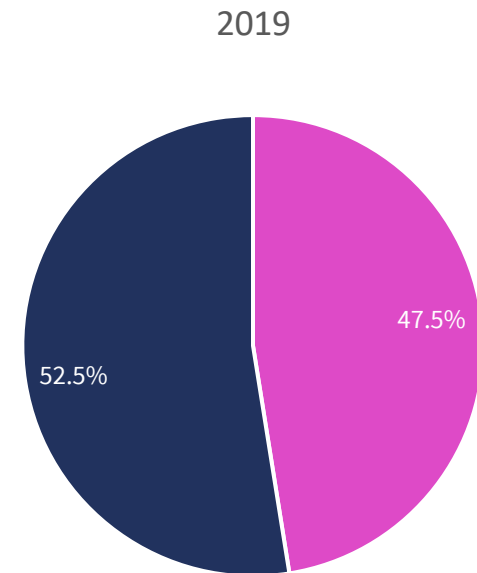
Social gained ~4 ppt share annually over the last two years



■ Social ■ Other Display



■ Social ■ Other Display

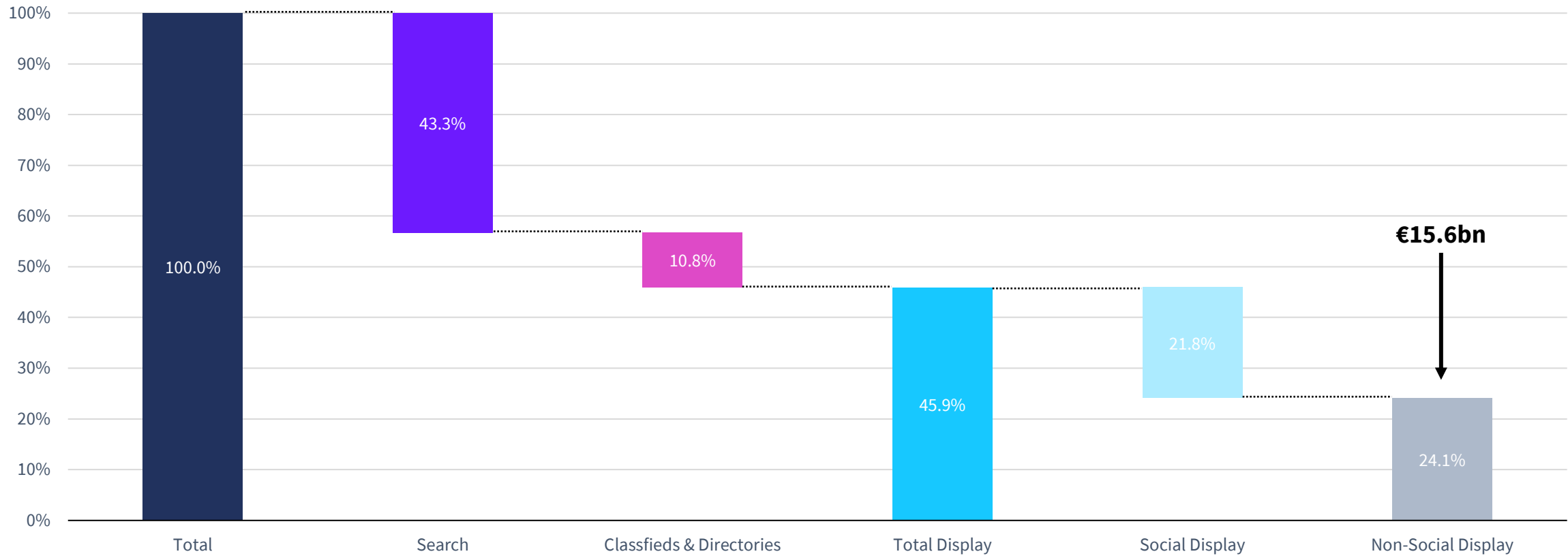


■ Social ■ Other Display

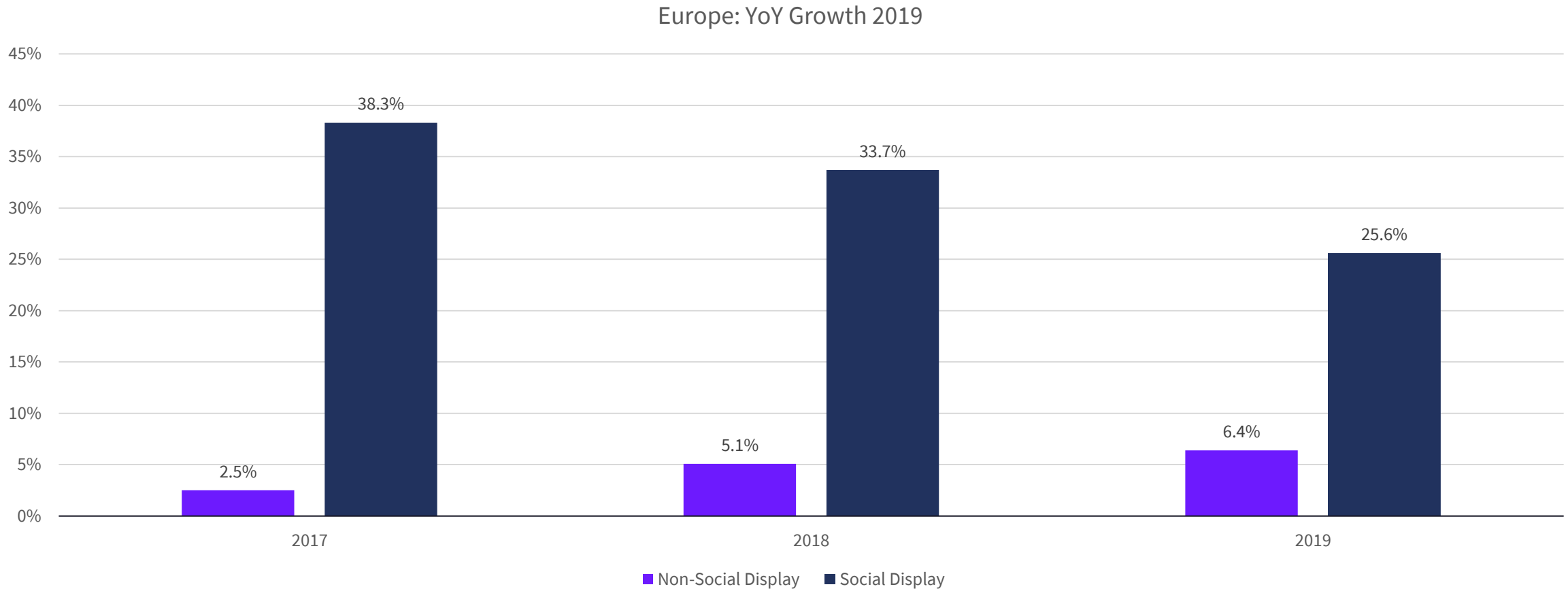
Note: numbers restated vs 2018 study due to revised methods of measuring social from national IABs

Non-Social Display is 24.1% of the market

Europe: Total Digital Ad Market Split (2019)

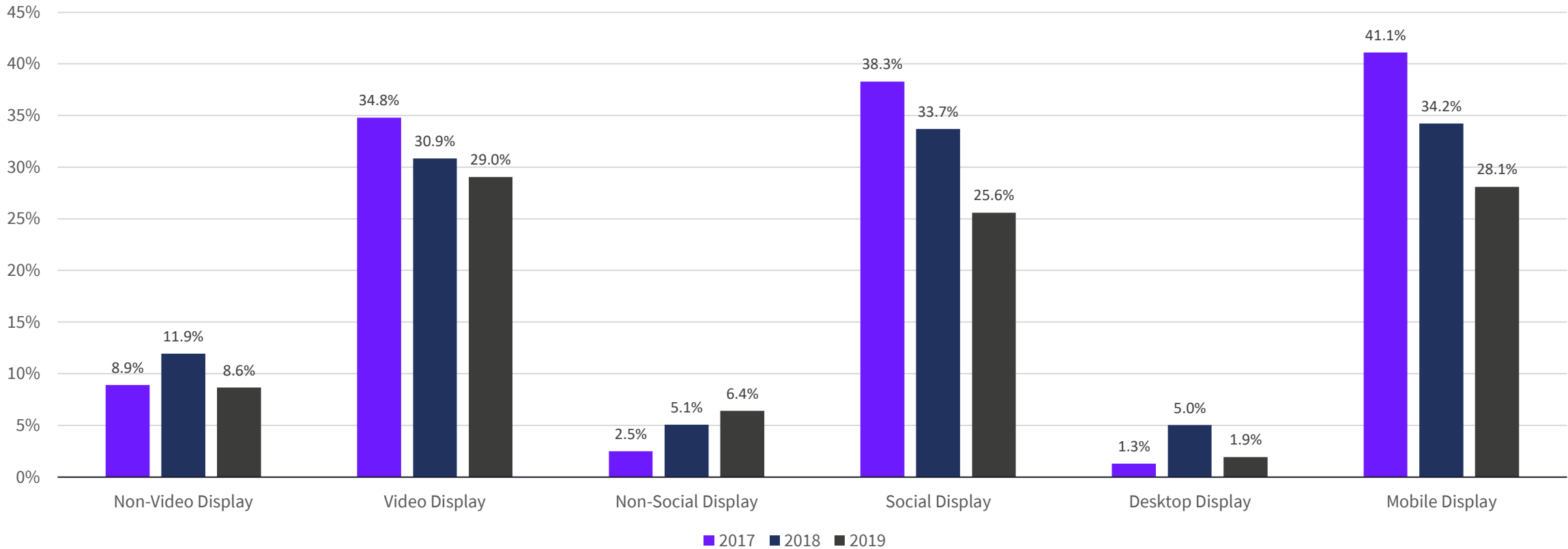


Non-Social Display sees growth acceleration for 2nd year in a row...



...while video and mobile remain other display drivers

Europe: Digital Display Ad Growth 2019 (YoY)



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