



adex
Benchmark 2018

**AdEx Benchmark
Study 2018**

The definitive guide to the state of the
European digital advertising market

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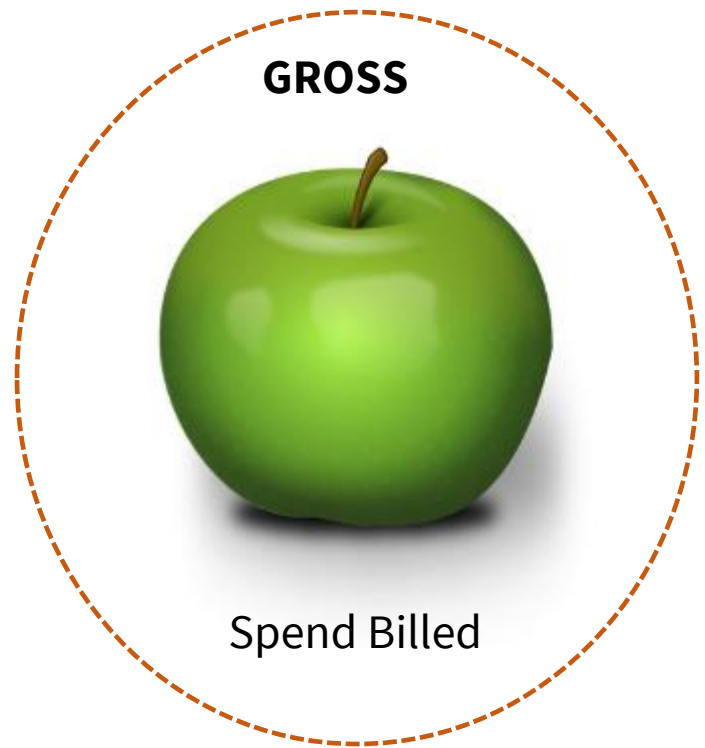
All data and analysis must be quoted as “Source: IAB Europe AdEx Benchmark Study”.

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About the study

A meta-analysis of digital ad spend in Europe





About the data

This market sizing is based on the following methods:

- Reported data from national IABs
- Data harmonised in gross = after discounts, before agency commissions
- Estimates by national IABs based on local insight
- Modelling based on company reports and market data

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 [NEW]



The size of the digital advertising market in Europe

€55.1 bn
+13.9%

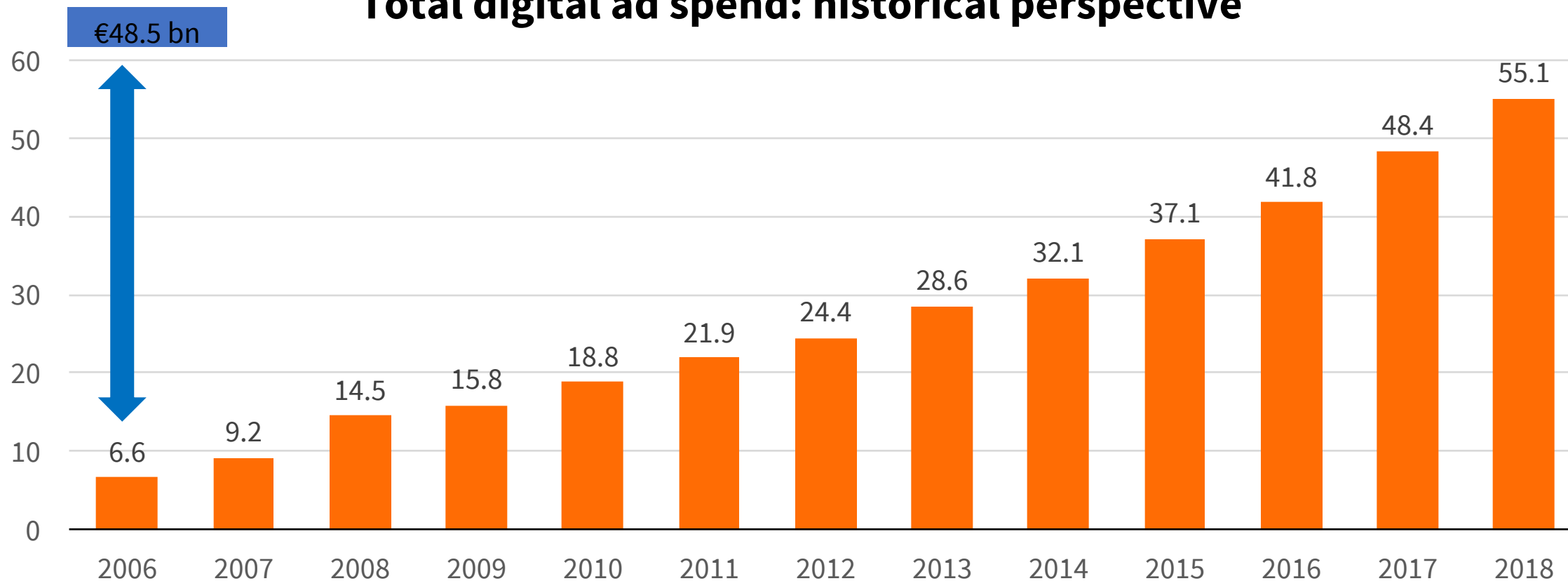
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€48.5bn net addition in 13 years, market, more than doubled since 2012

Total digital ad spend: historical perspective



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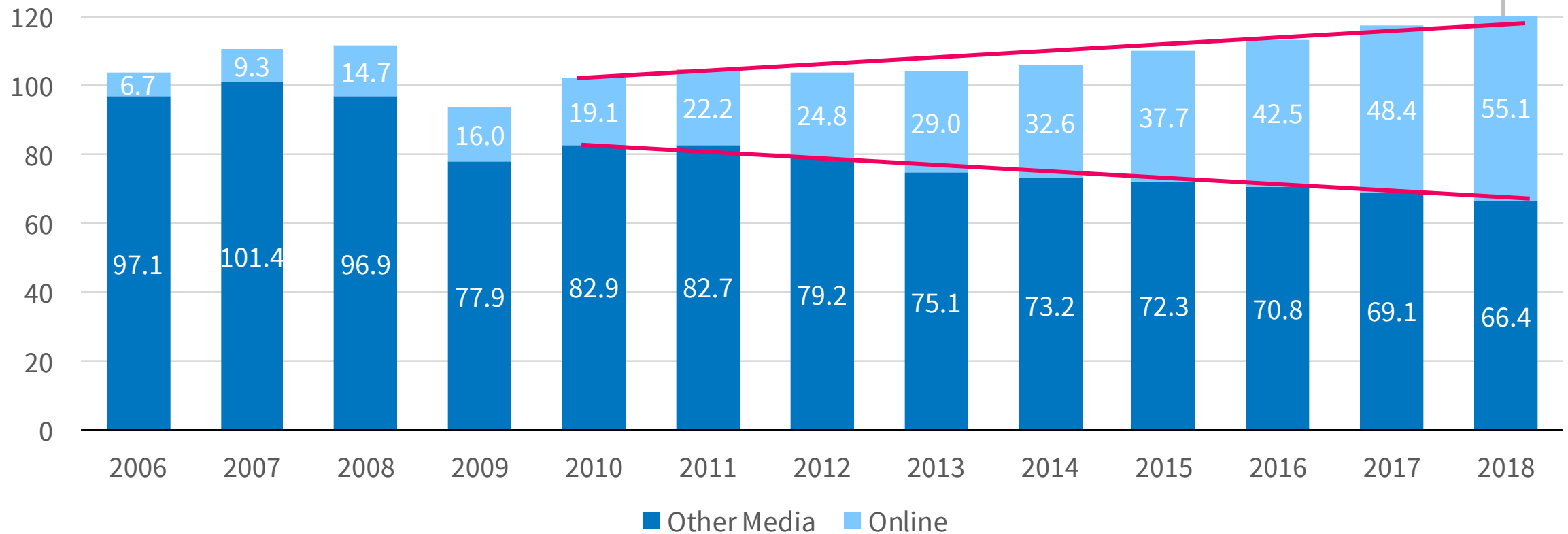


Source: IAB Europe AdEx Benchmark 2018 Study



Digital drives paid-media ad market to new high: time-series now shows clear bi-furcation of ad market since 2010

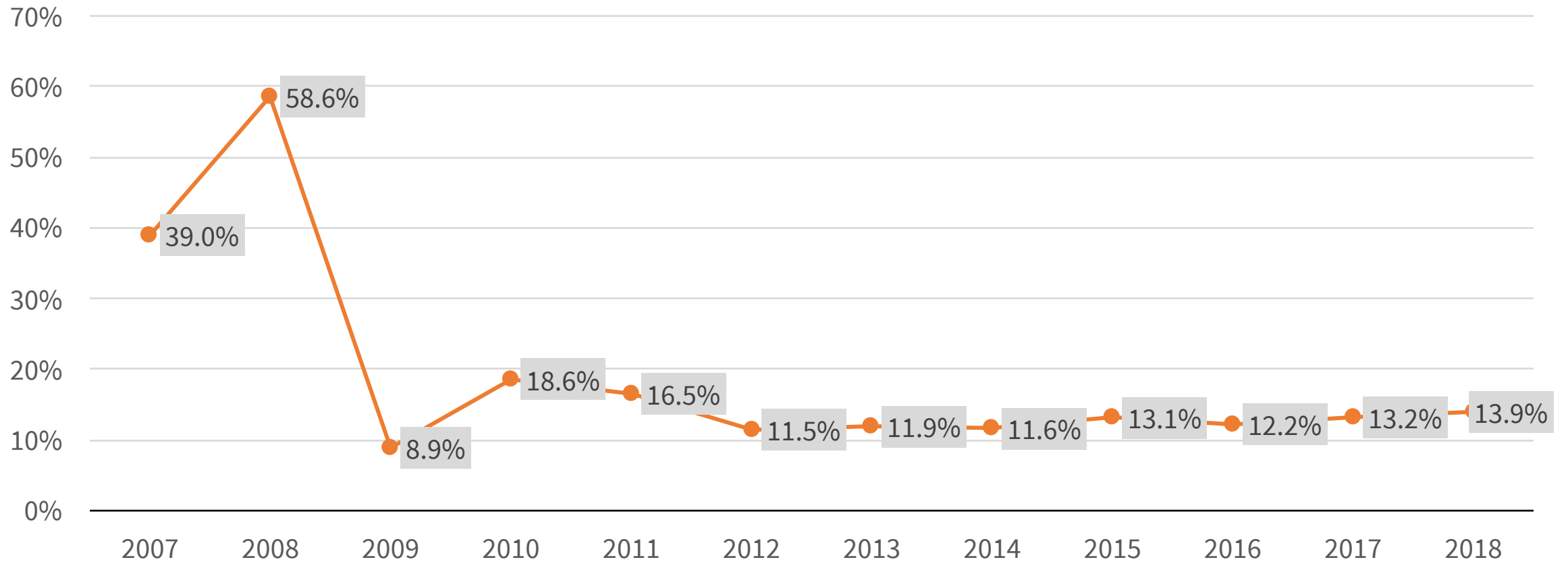
Europe: traditional vs digital advertising (€bn)



Digital: 45% of all paid-media advertising

Fastest growth since 2011

Historical digital advertising market growth



Source: IAB Europe AdEx Benchmark 2018 Study

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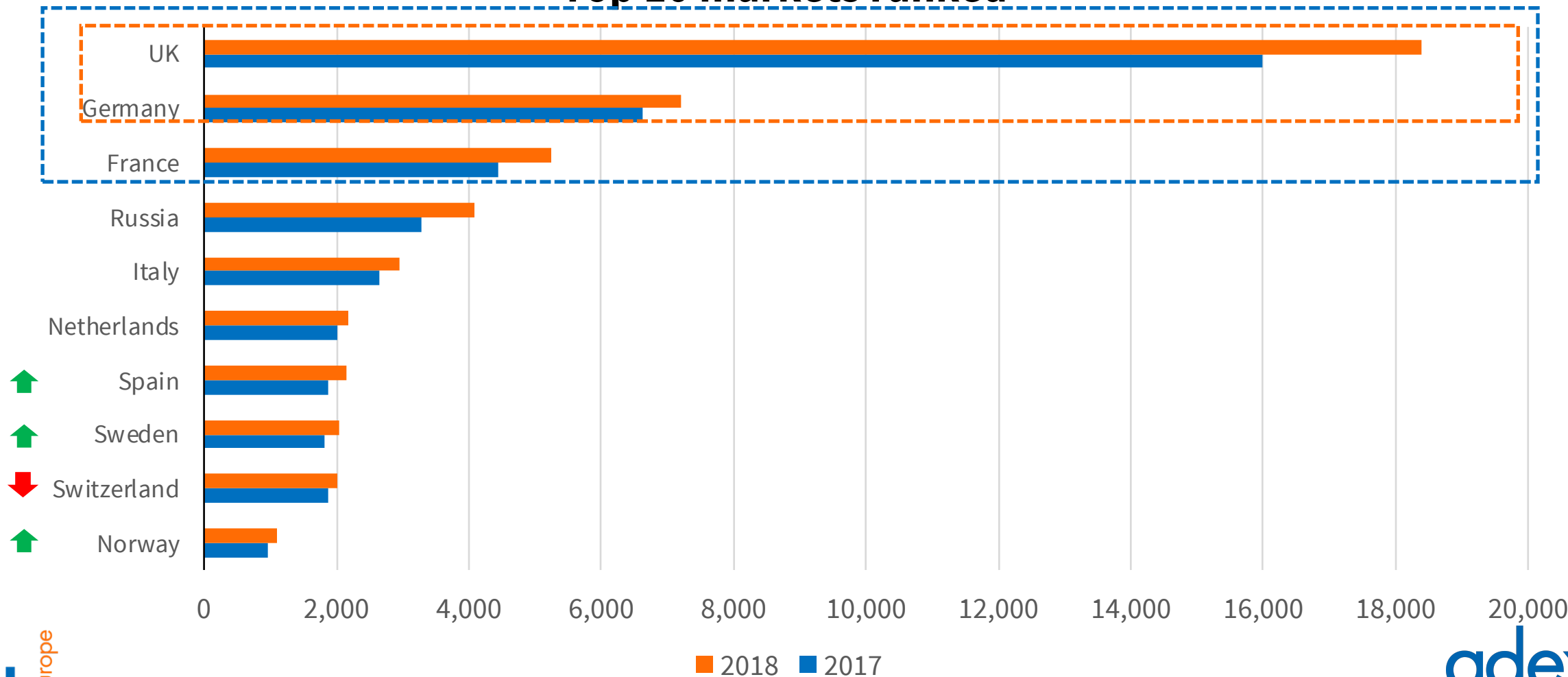
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Markets

Top 6 ranking stable whilst Spain, Sweden, Norway move up

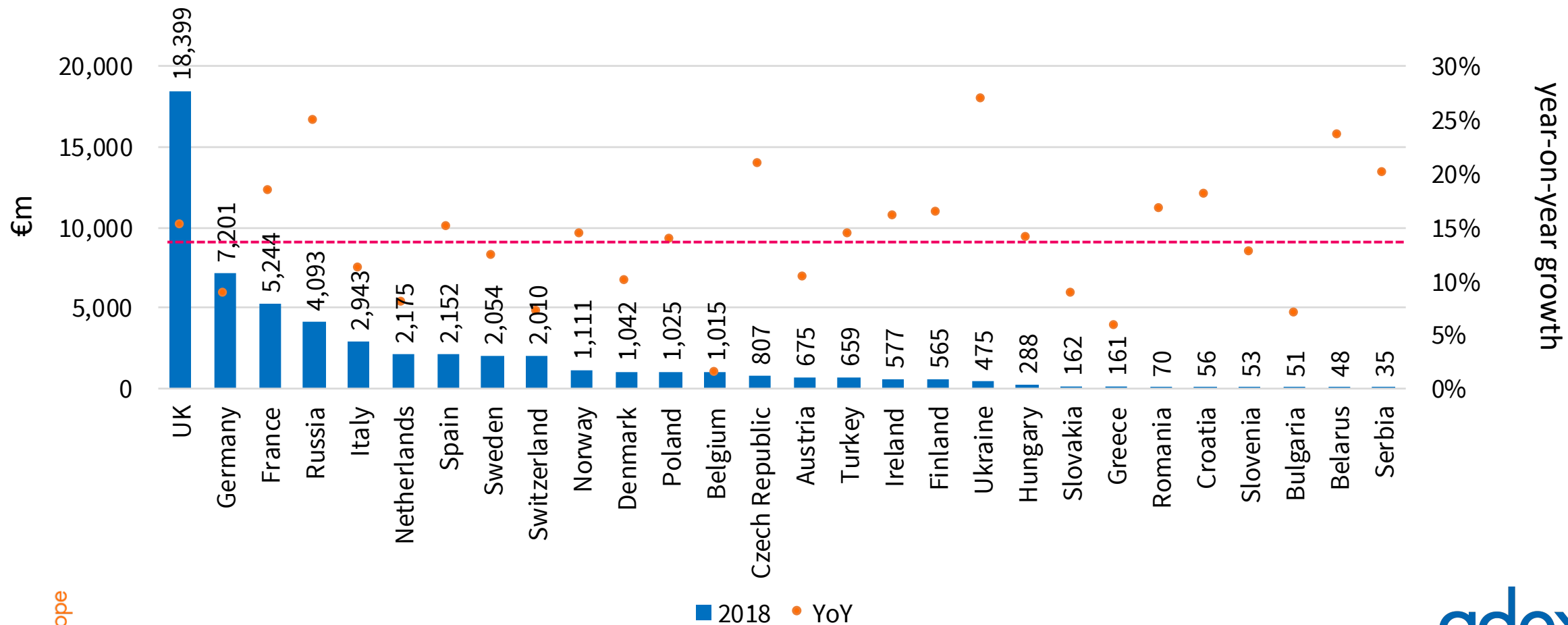
Top 10 markets ranked



Source: IAB Europe AdEx Benchmark 2018 Study

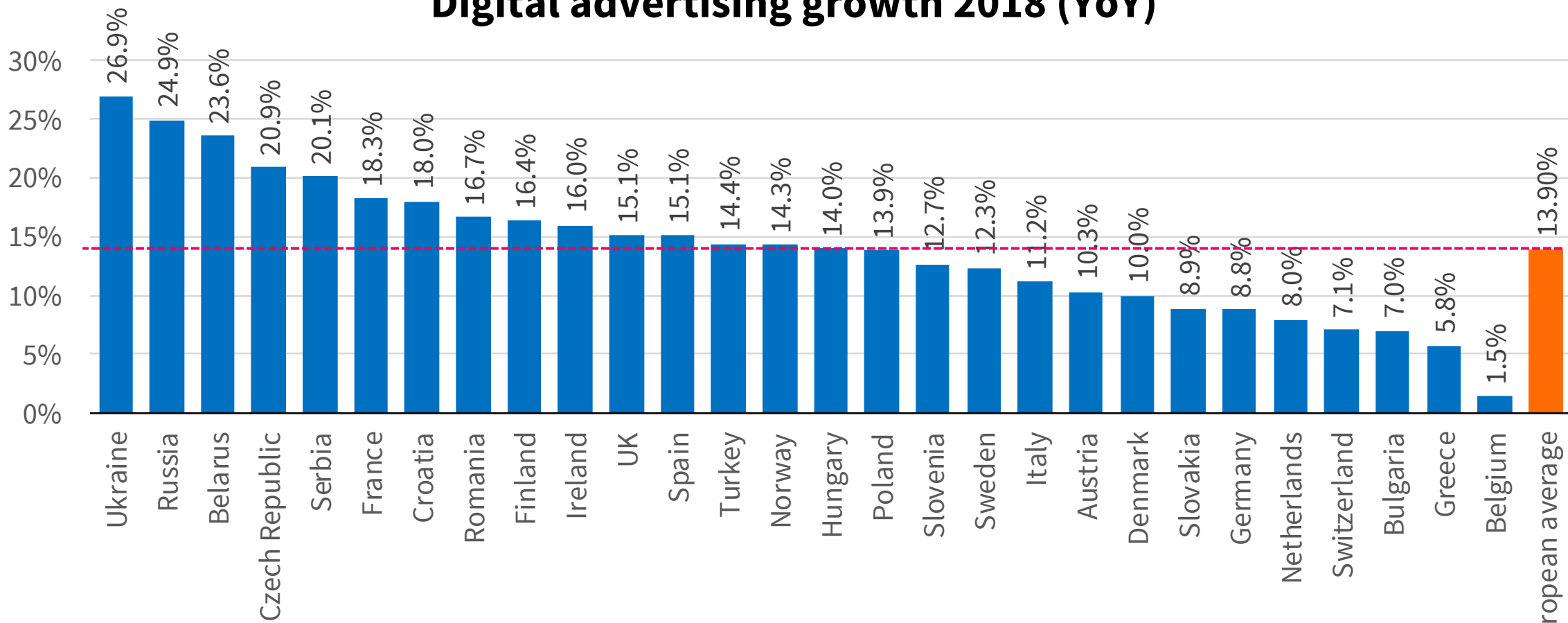
Market size by country

Digital ad spend & growth by country



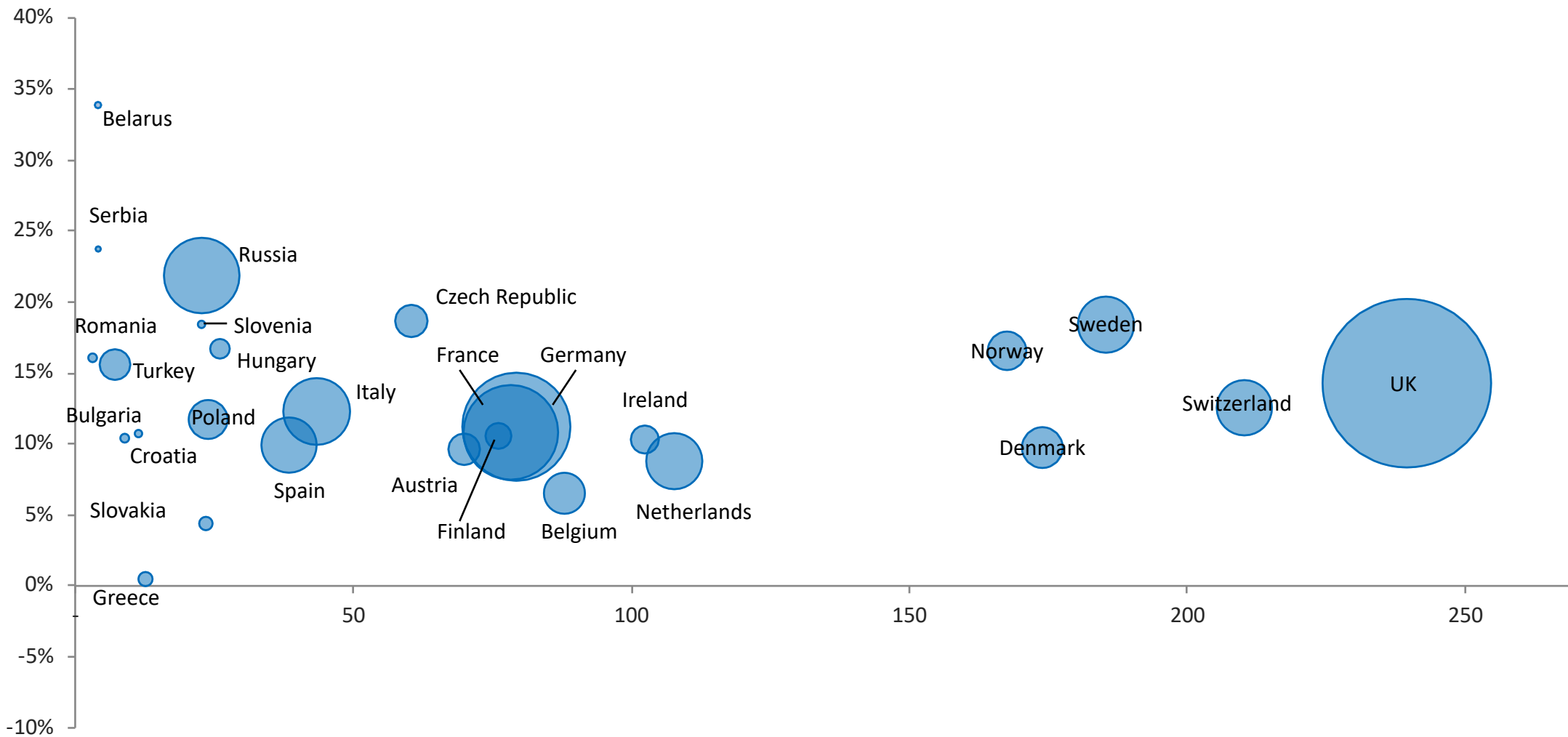
Growth driven by CEE

Digital advertising growth 2018 (YoY)



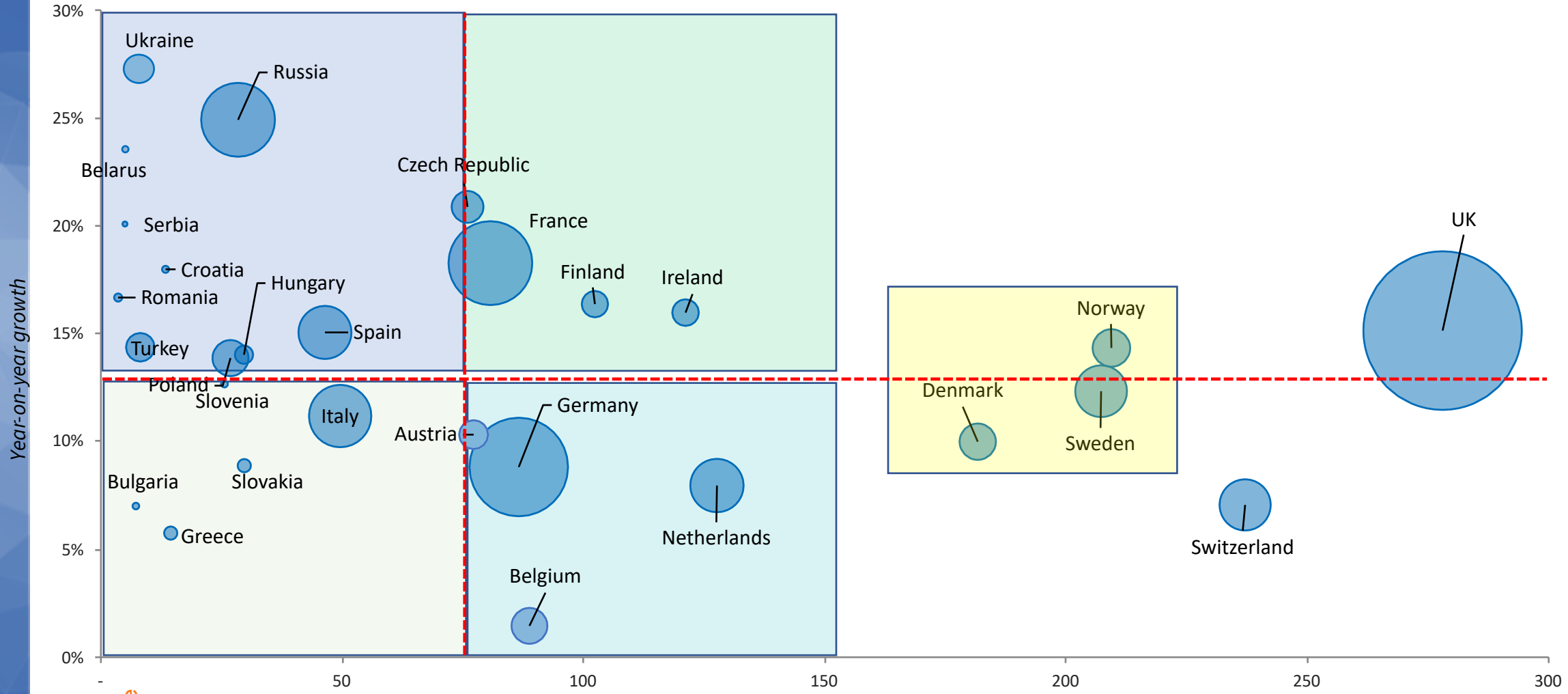
Source: IAB Europe AdEx Benchmark 2018 Study

A look back at 2017



Source: IAB Europe AdEx Benchmark 2018 Study

...reveals a Europe of individual growth stories in 2018



----- European average lines

Source: IAB Europe AdEx Benchmark 2018 Study

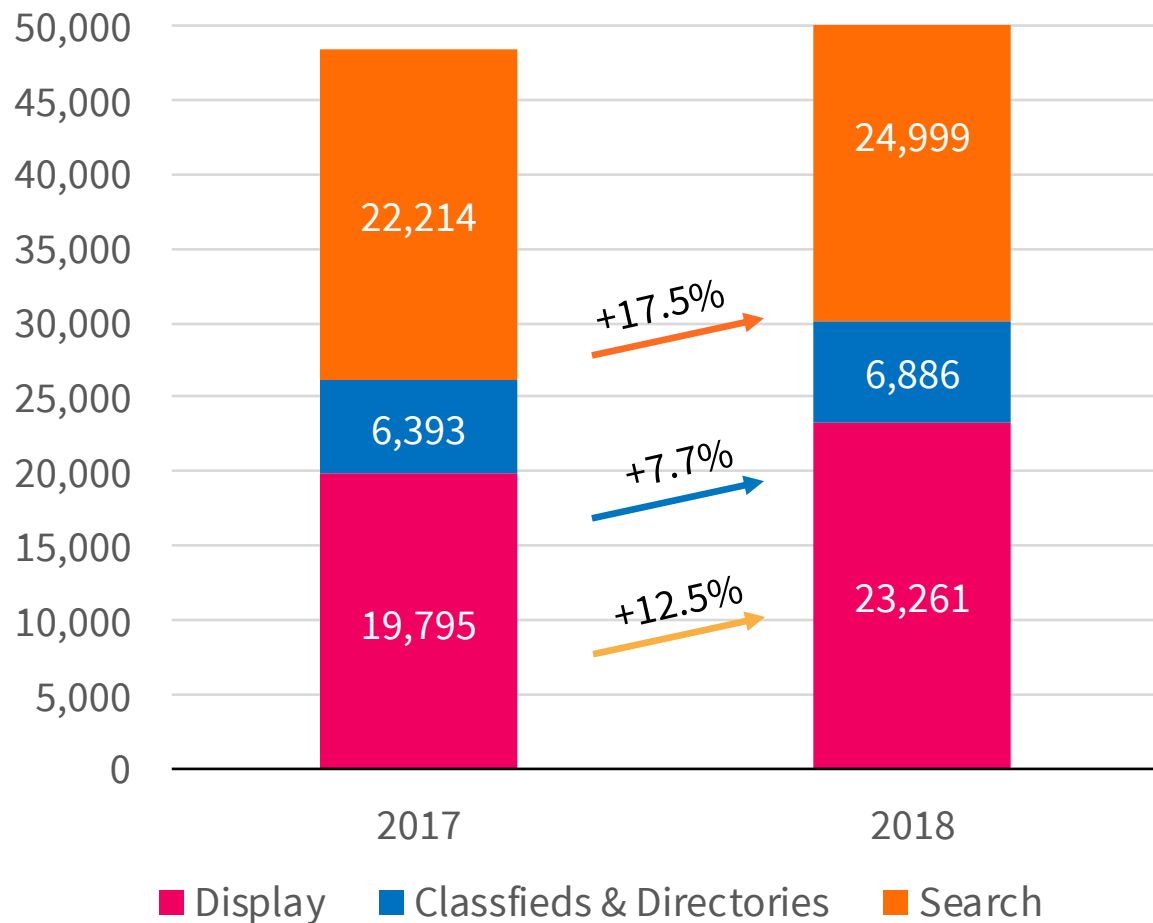
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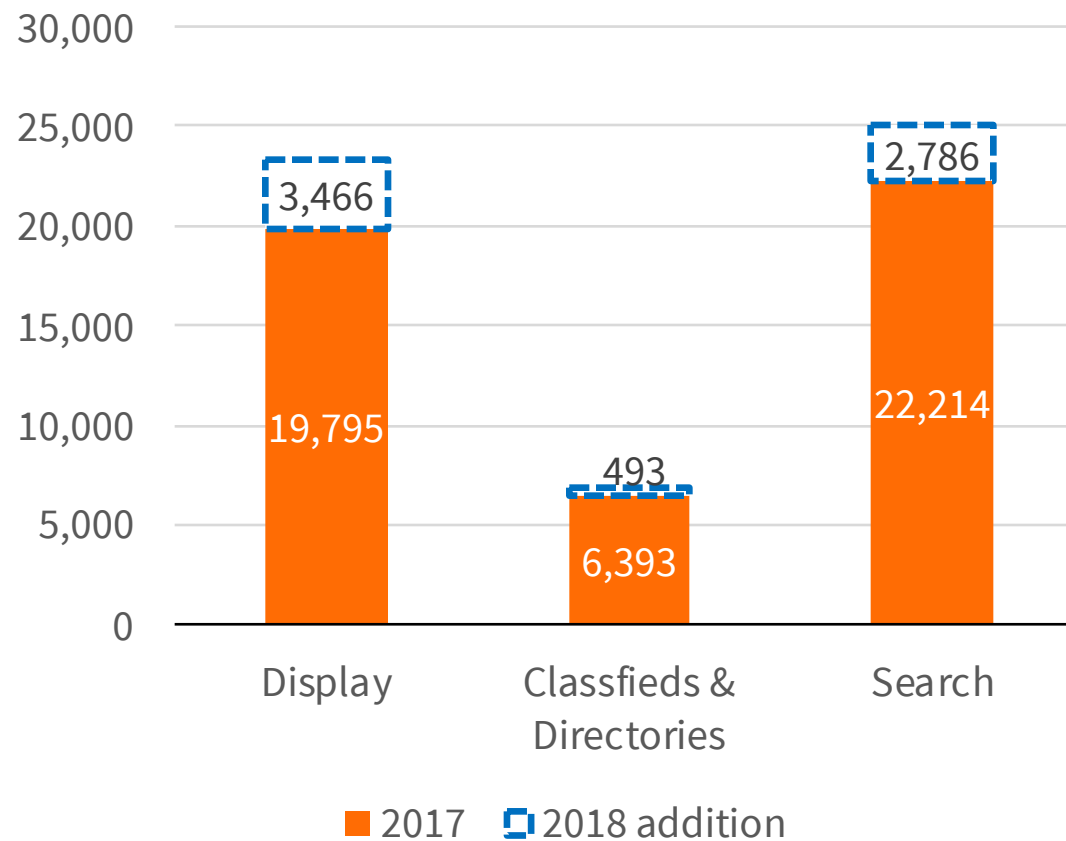
Formats

€6.7bn added in total in 2018

Digital ad spend by format (€m)*



Net additions 2018 (€m)



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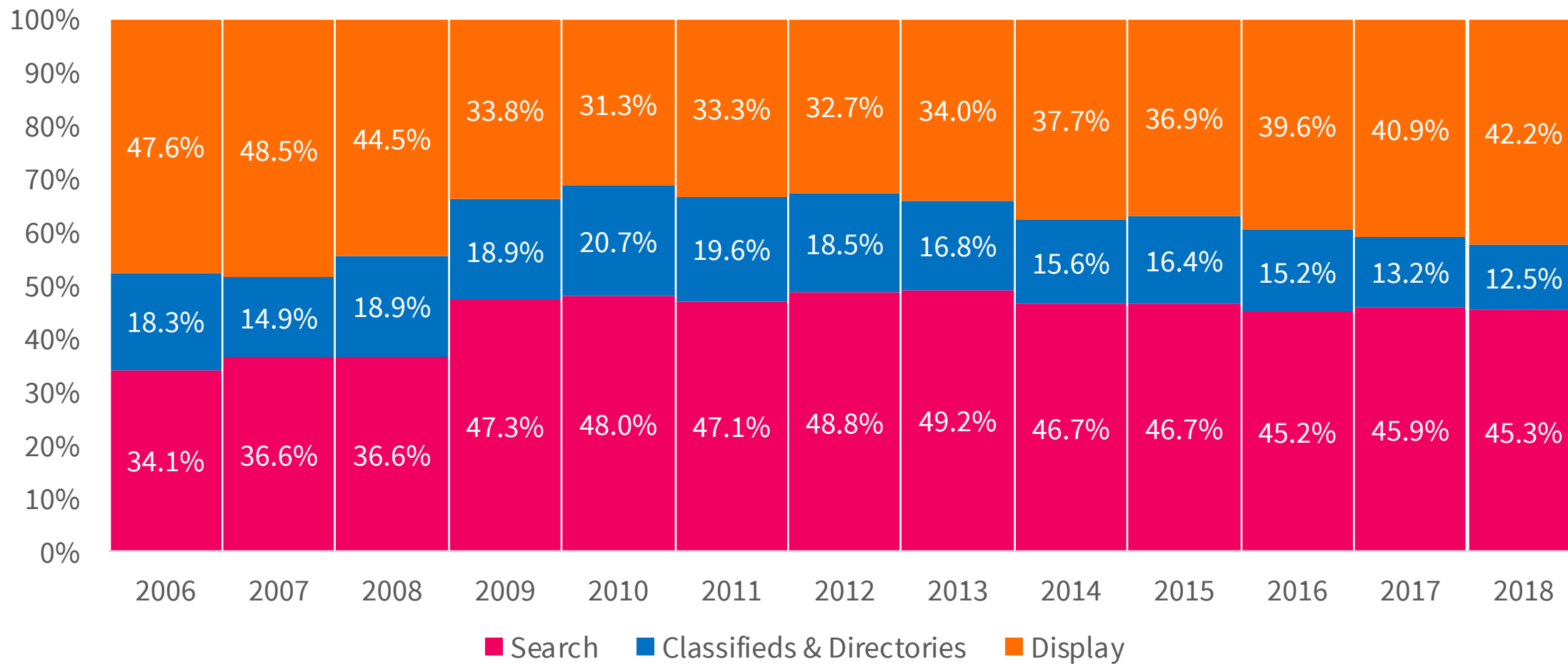


Source: IAB Europe AdEx Benchmark 2018 Study



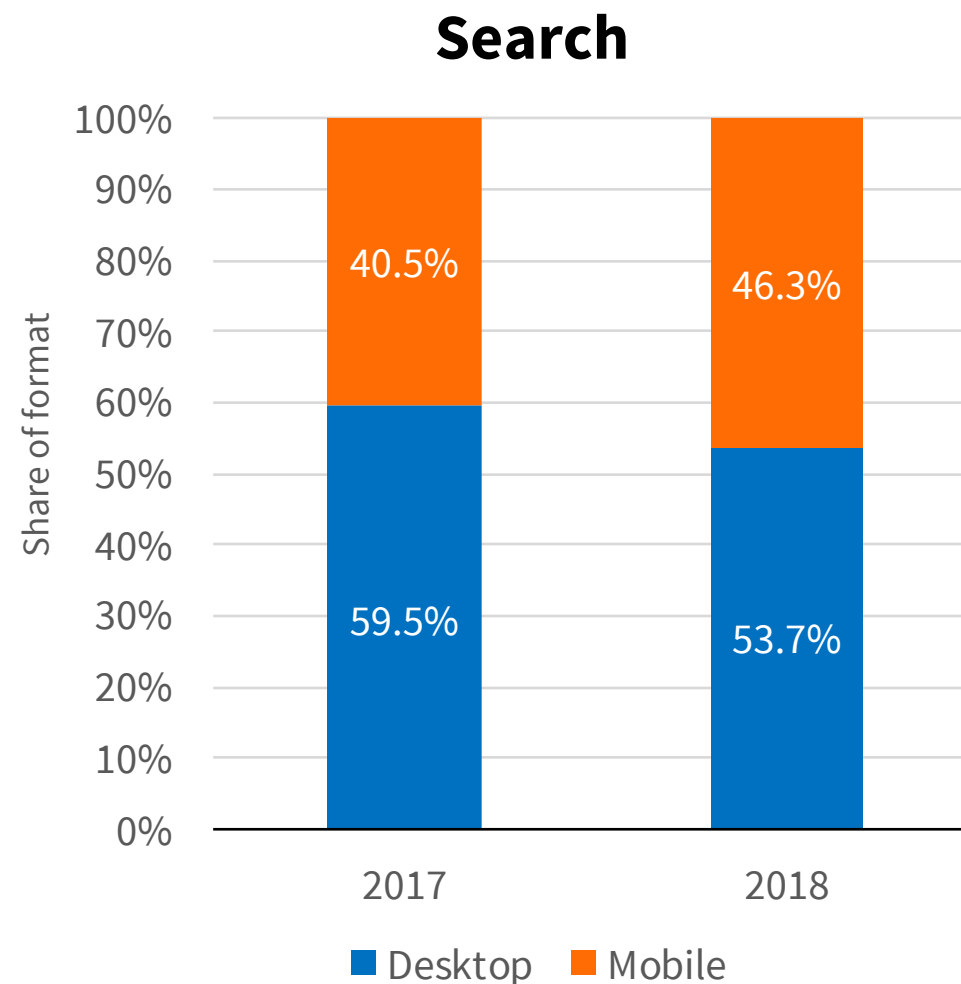
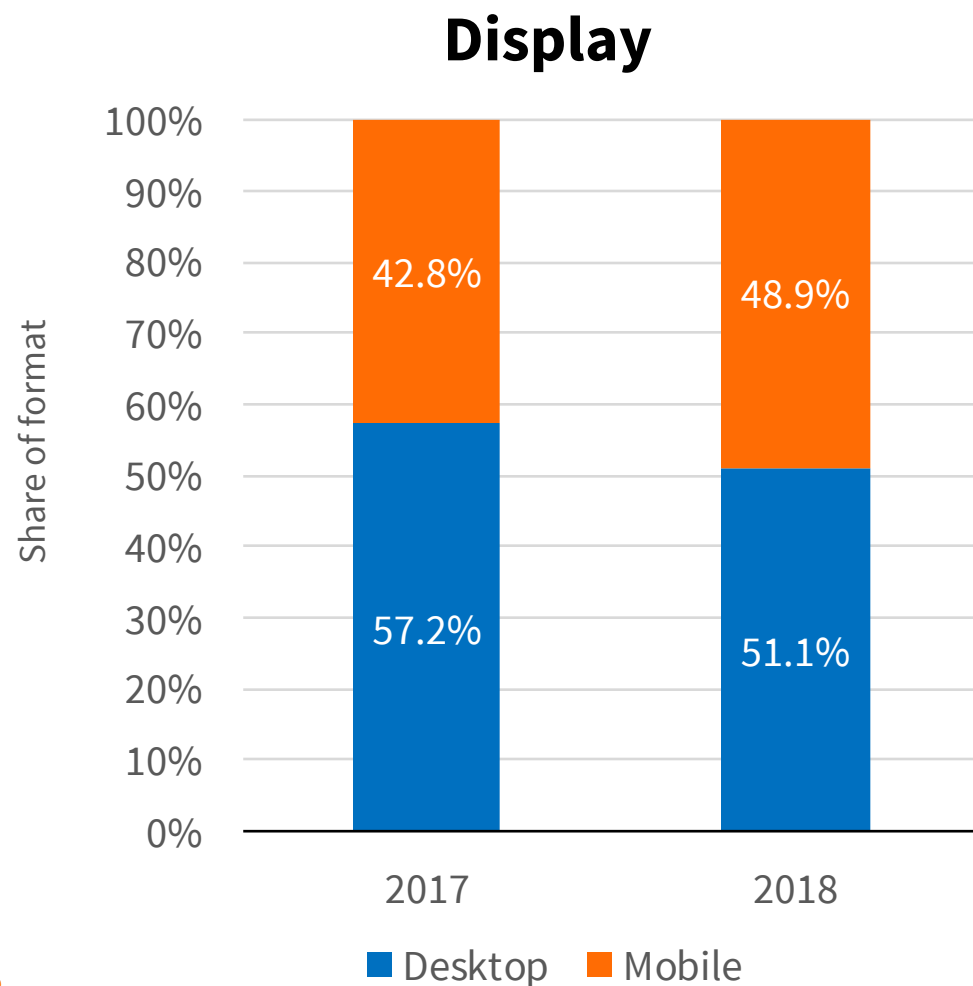
Display closes gap to search

Digital ad spend split by format



Source: IAB Europe AdEx Benchmark 2018 Study

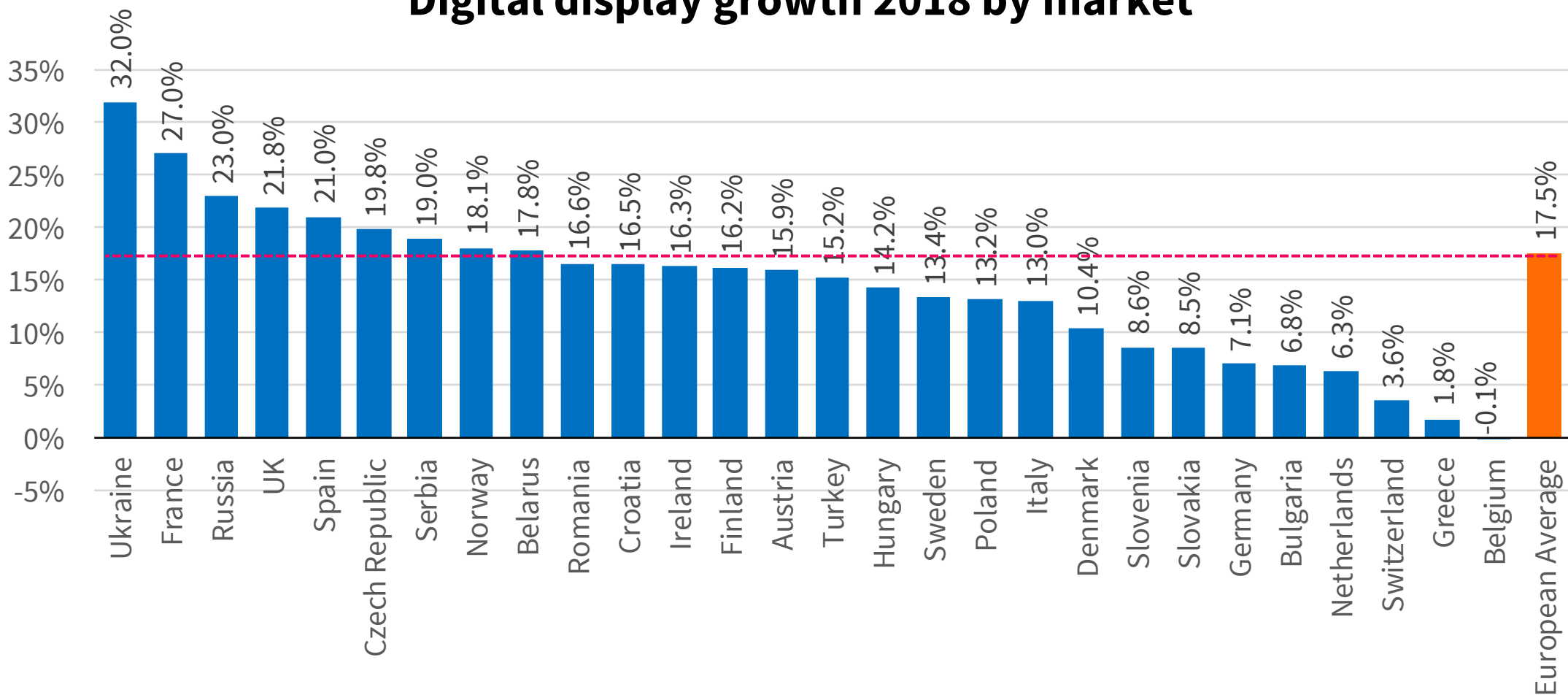
Mobile closes in on 50% of all digital ad spend



Source: IAB Europe AdEx Benchmark 2018 Study

8 markets have display growth above European average: diverse group of mature & emerging markets

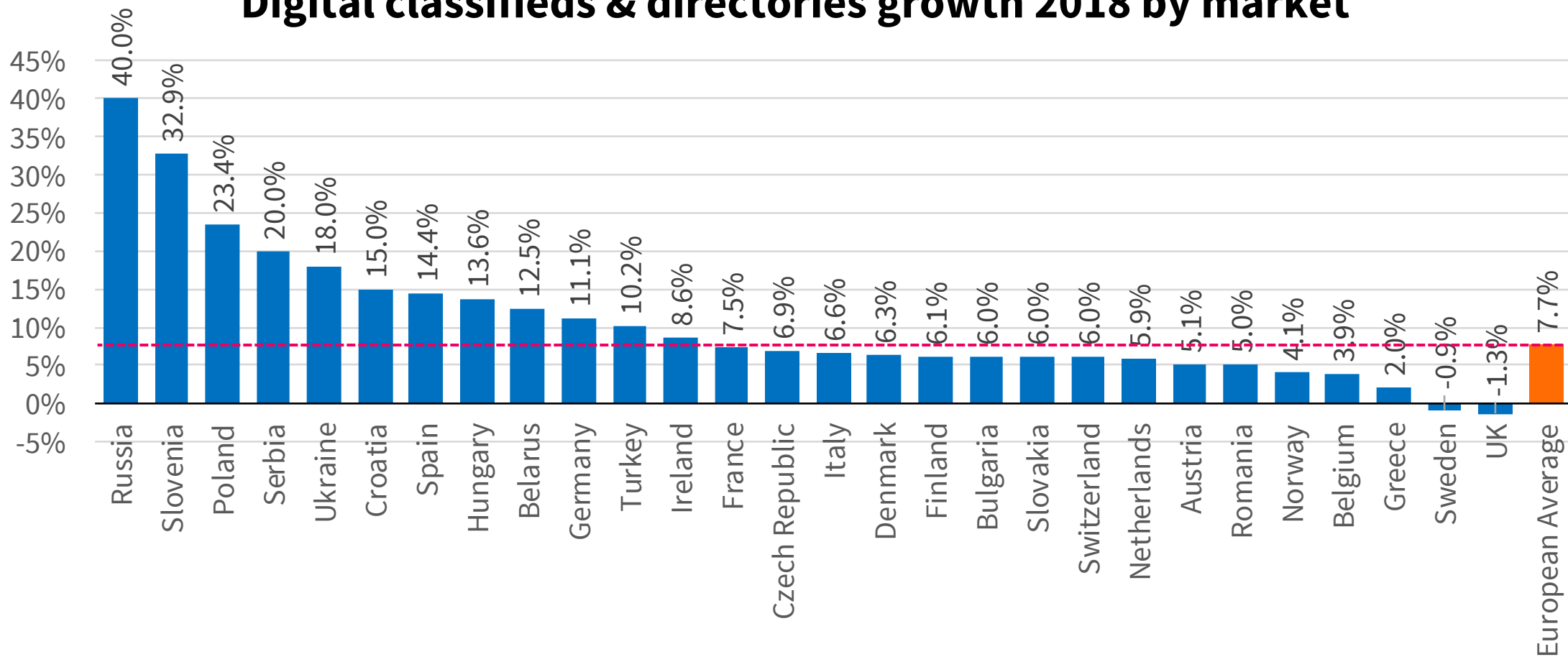
Digital display growth 2018 by market



Source: IAB Europe AdEx Benchmark 2018 Study

Uneven picture across Europe as classifieds & directories benefit from consolidation, but shift to display-based ad model

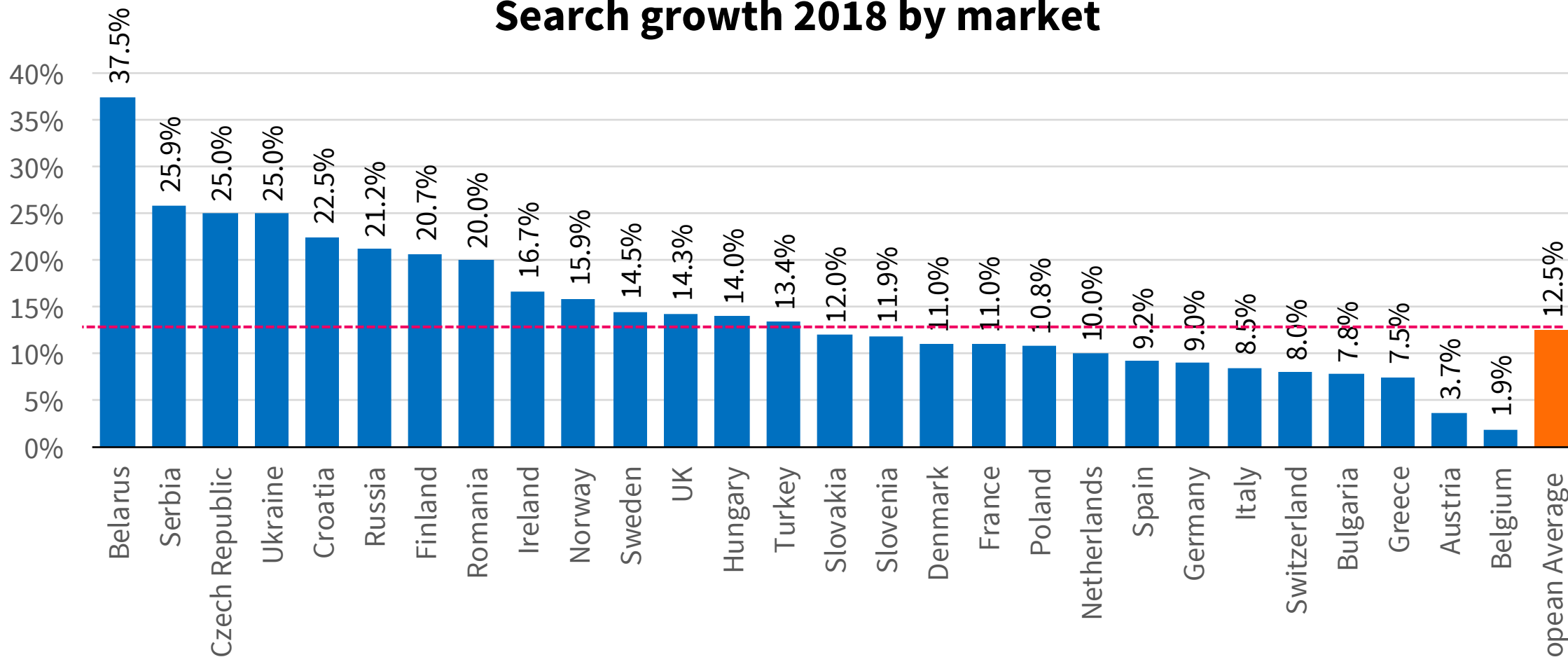
Digital classifieds & directories growth 2018 by market



Source: IAB Europe AdEx Benchmark 2018 Study

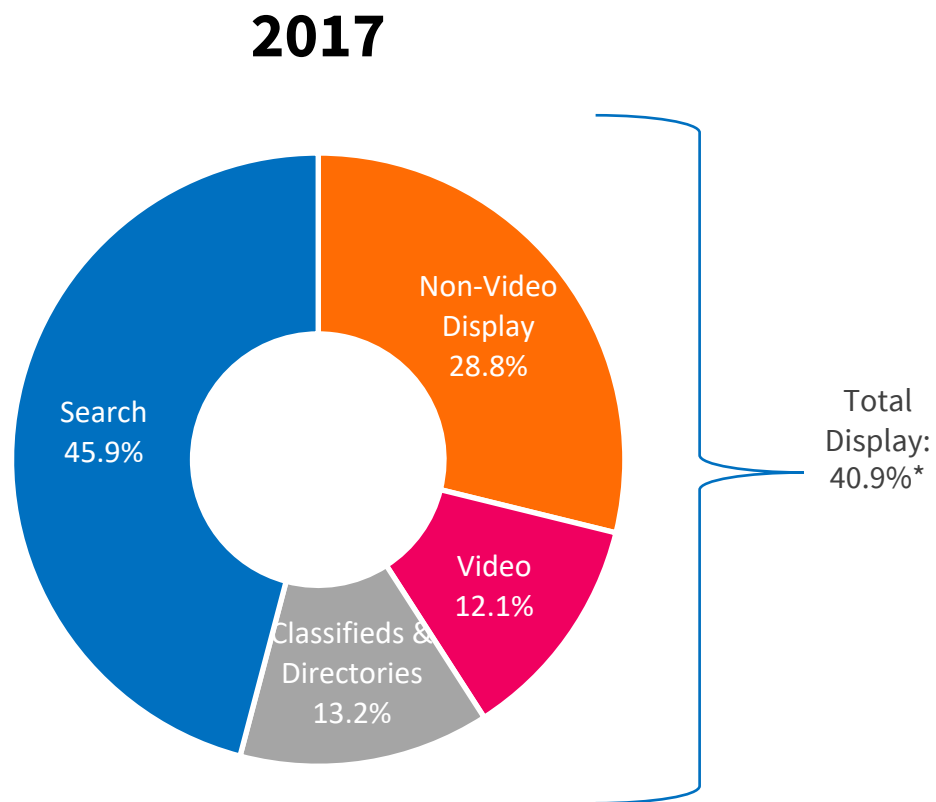
Search growth led by CEE markets

Search growth 2018 by market

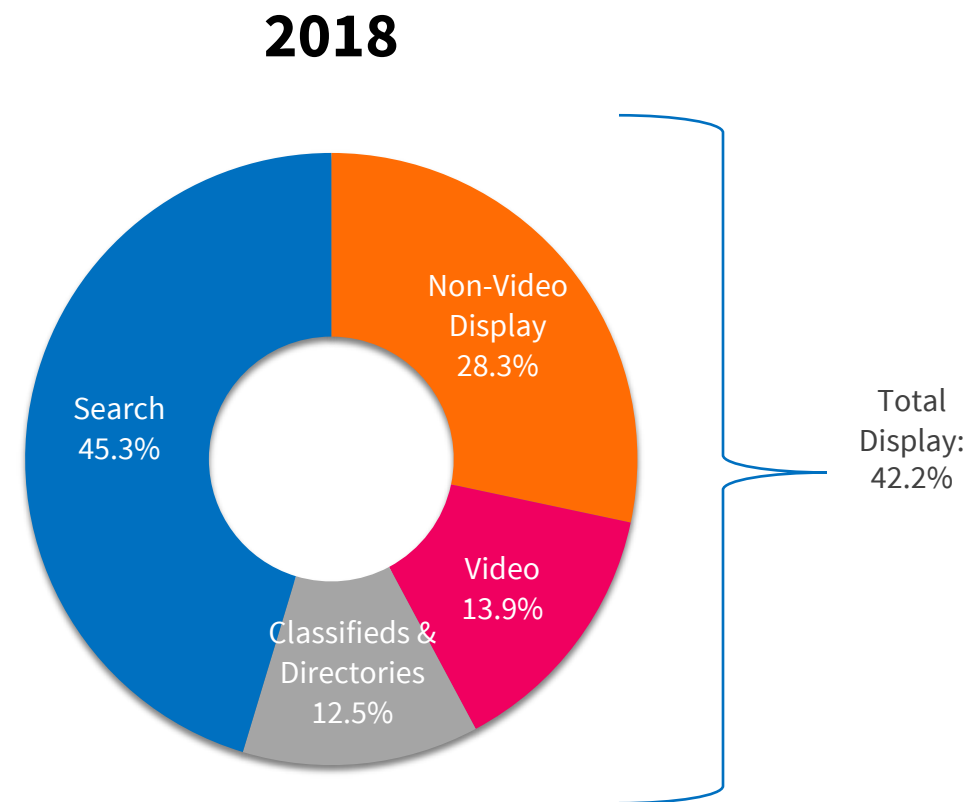


Source: IAB Europe AdEx Benchmark 2018 Study

Expansion of video drives share gains of total display

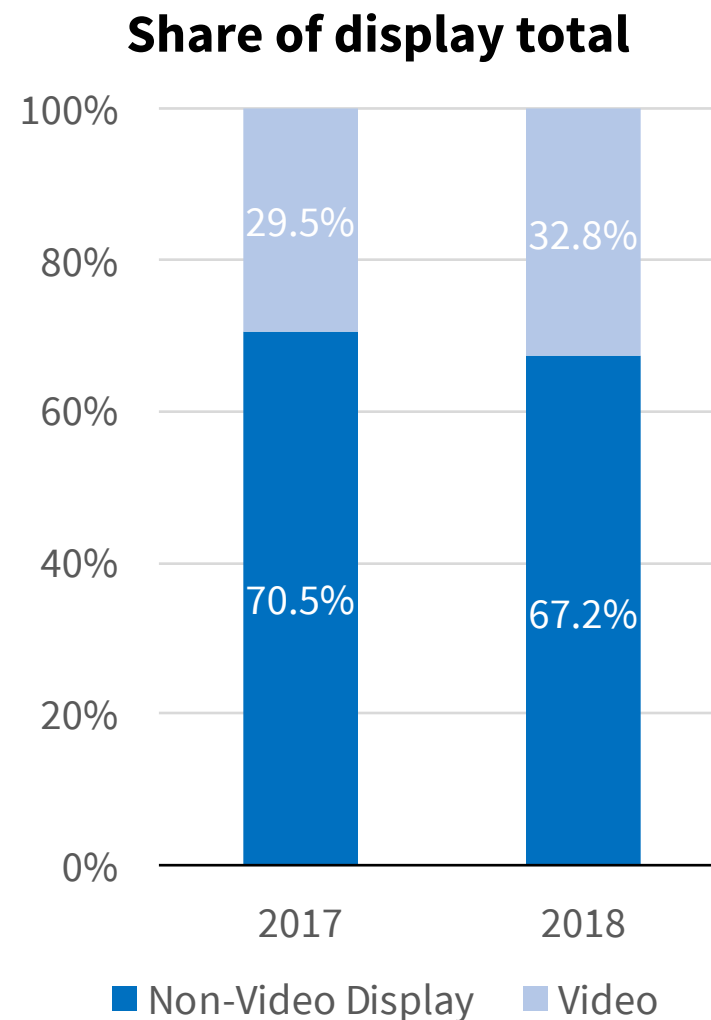
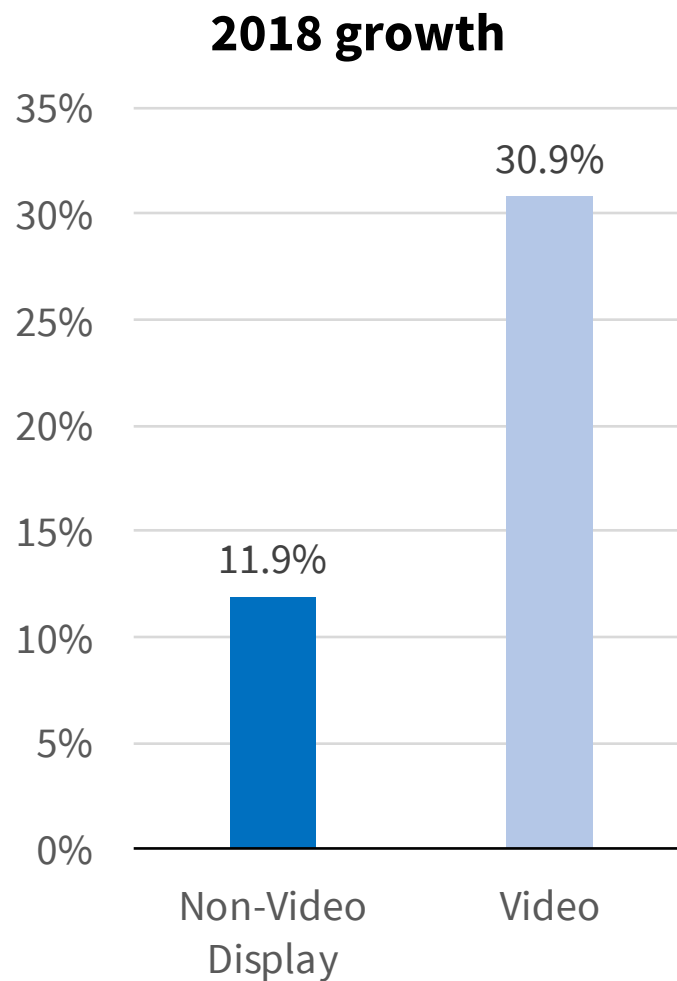
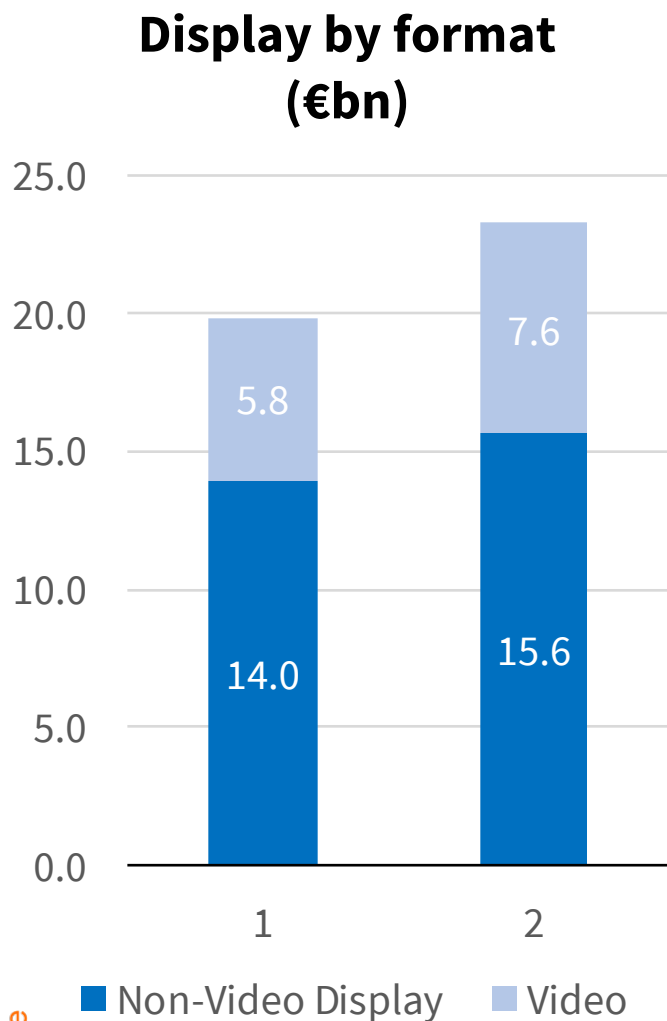


■ Non-Video Display ■ Video ■ Classifieds & Directories ■ Search



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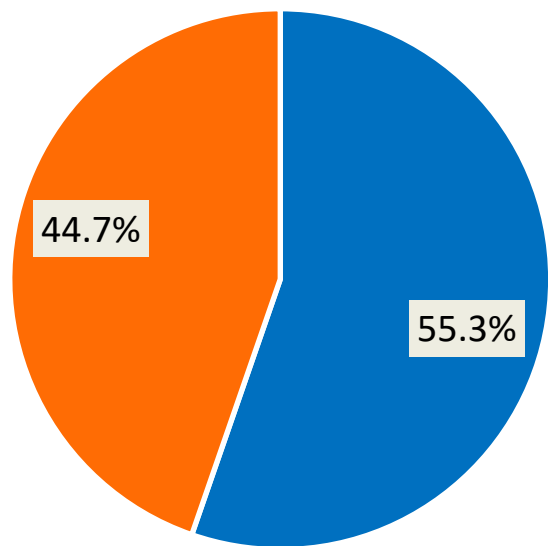
Video reaches 1/3 of display



Source: IAB Europe AdEx Benchmark 2018 Study

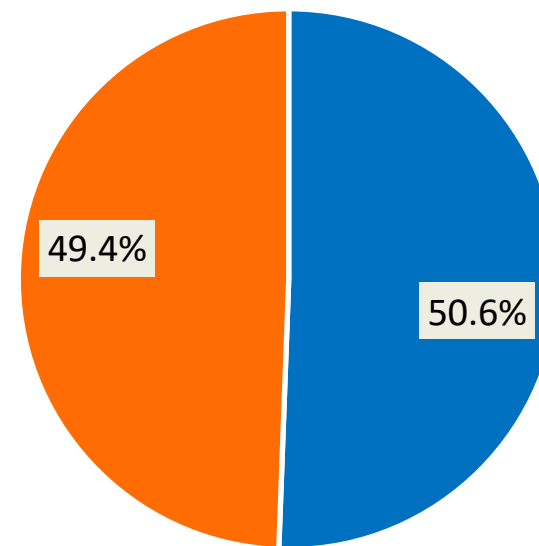
Out-Stream (+44.7% YoY) on par with in-stream video (+19.7% YoY)*

2017: Share of digital video ad spend



■ In-Stream ■ Out-Stream

2018: Share of digital video ad spend



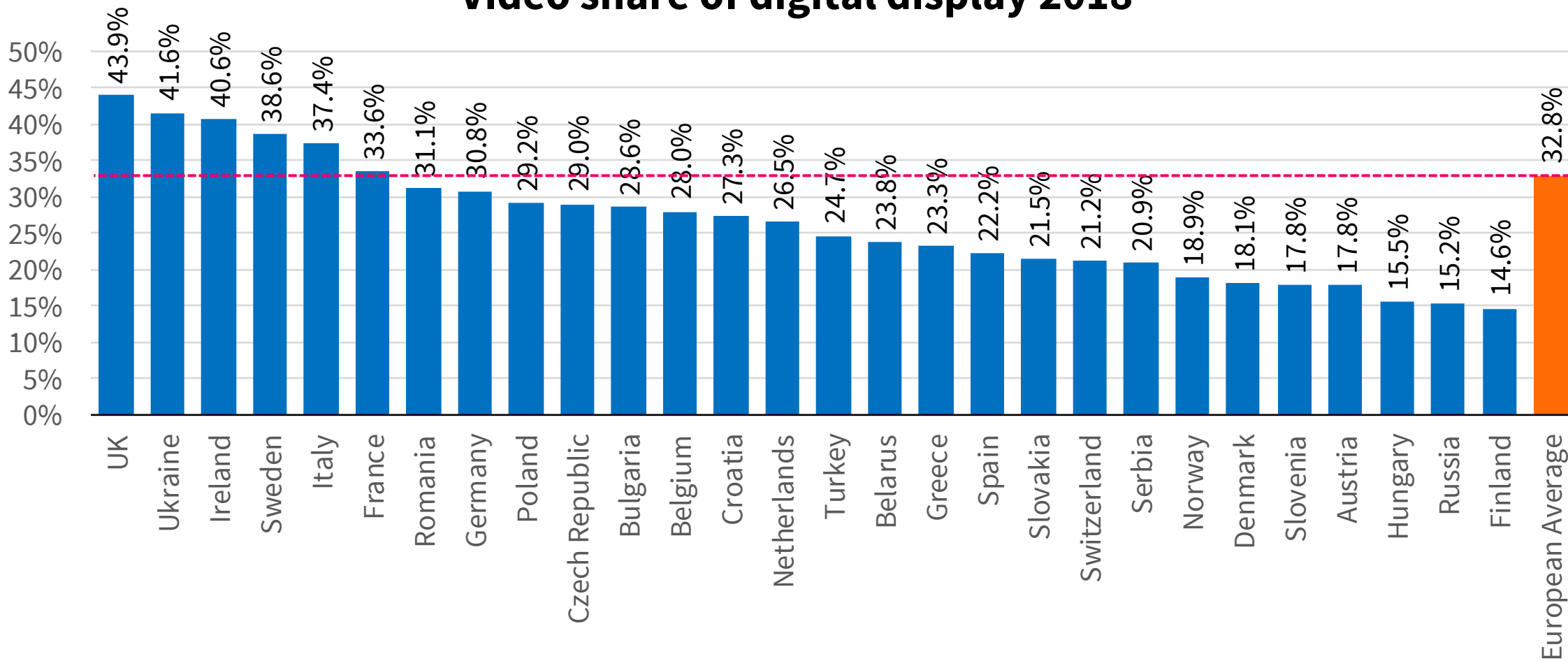
■ In-Stream ■ Out-Stream

Source: IAB Europe AdEx Benchmark 2018 Study

*Out-Stream includes 'in-feed'. Methodology change vs 2017 study.

Video is 1/3 of digital display advertising...

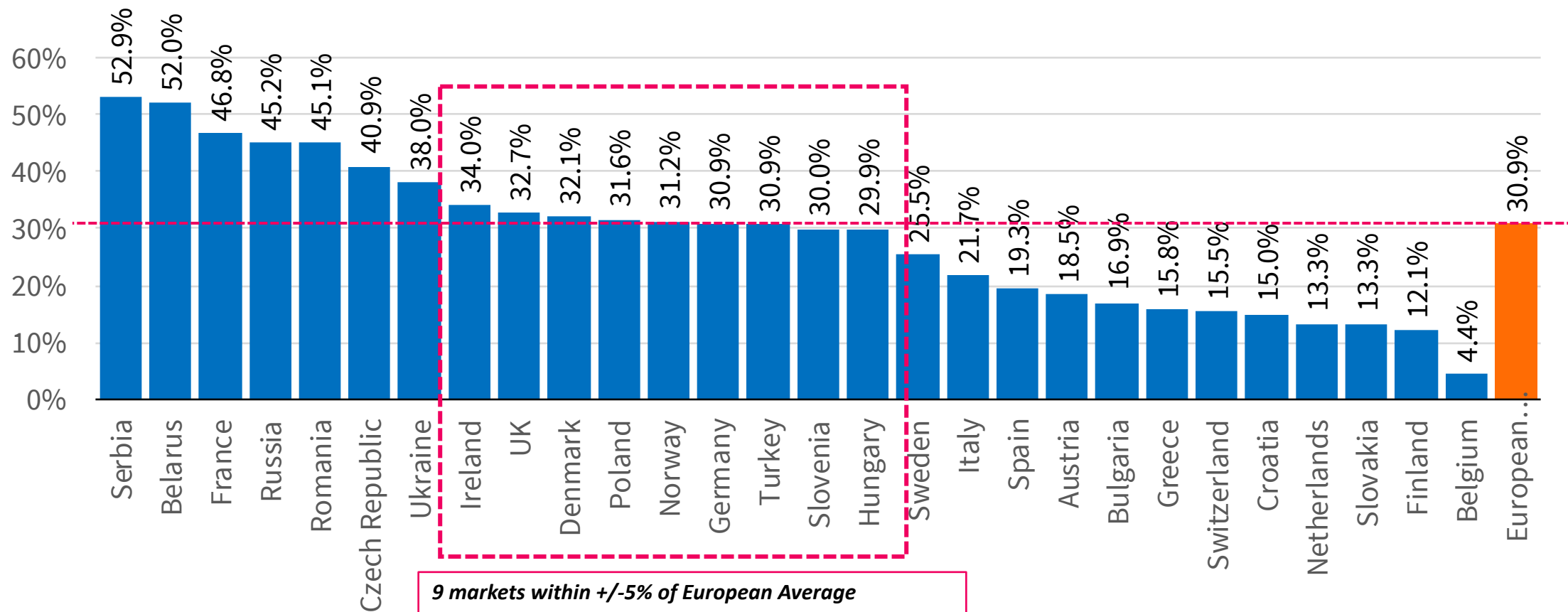
Video share of digital display 2018



Source: IAB Europe AdEx Benchmark 2018 Study

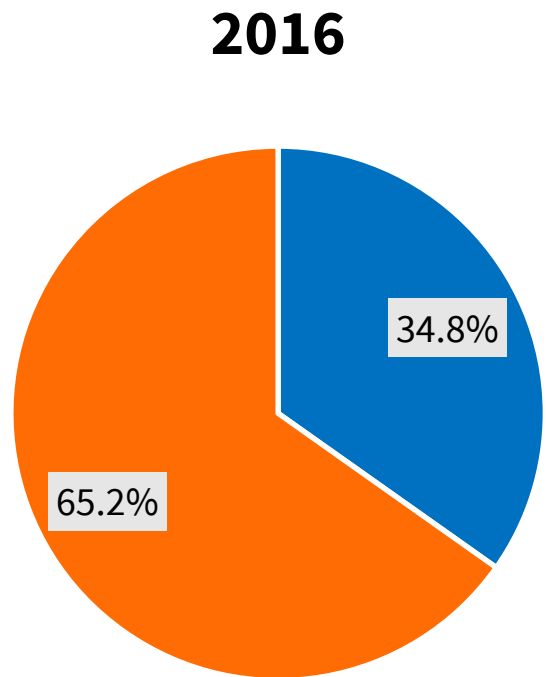
...and strong double-digit growth in mature & emerging markets

Digital video ad growth 2018

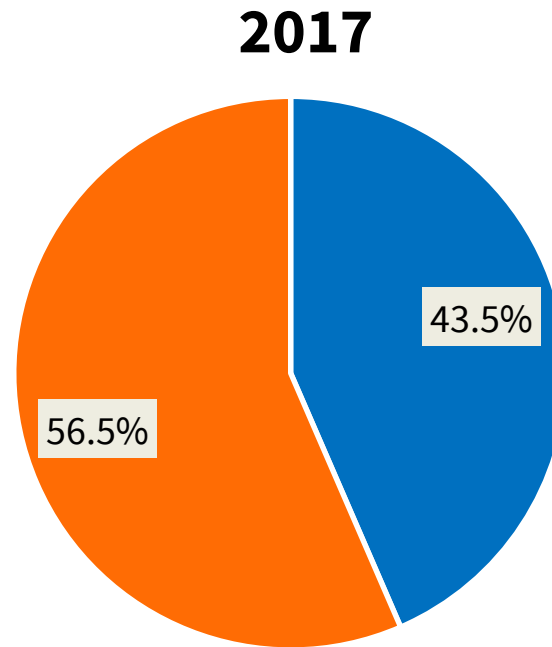


Source: IAB Europe AdEx Benchmark 2018 Study

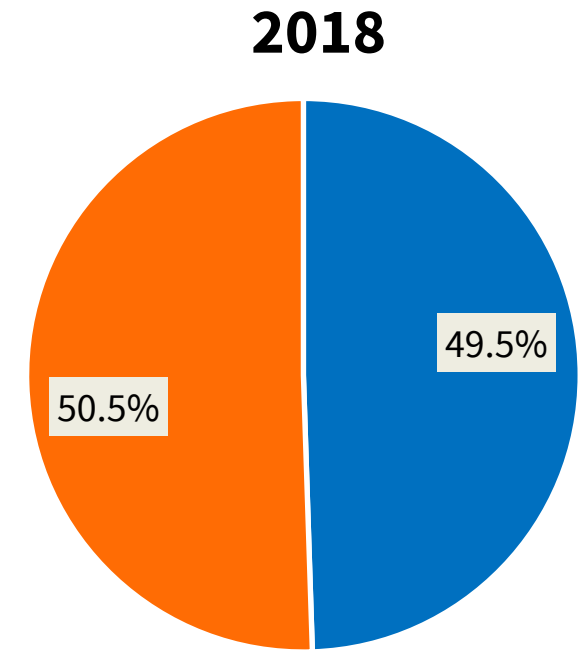
Social climbed from 35% to 50% of display in 3 years



■ Social ■ Other Display



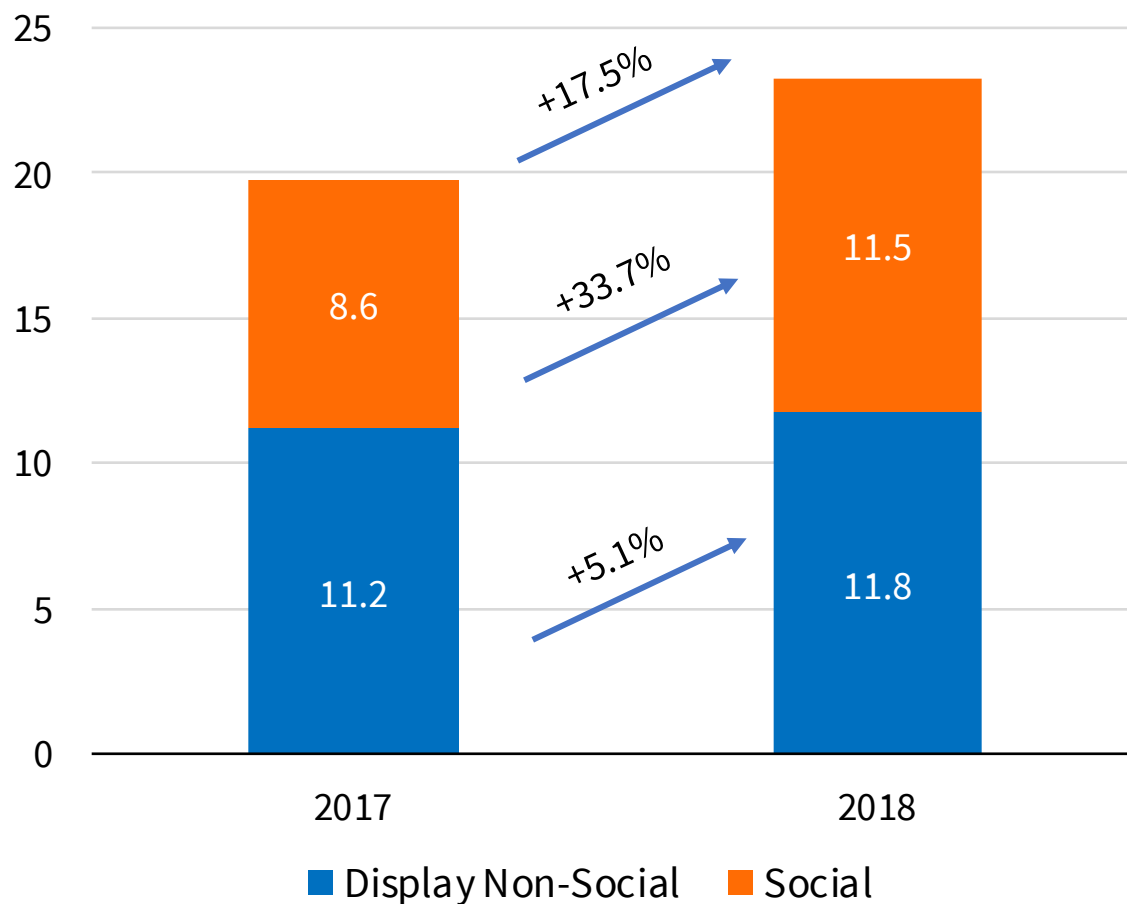
■ Social ■ Other Display



■ Social ■ Other Display

Social fuels display growth in Europe

Social vs. other display



+33.7%

Social growth in 2018

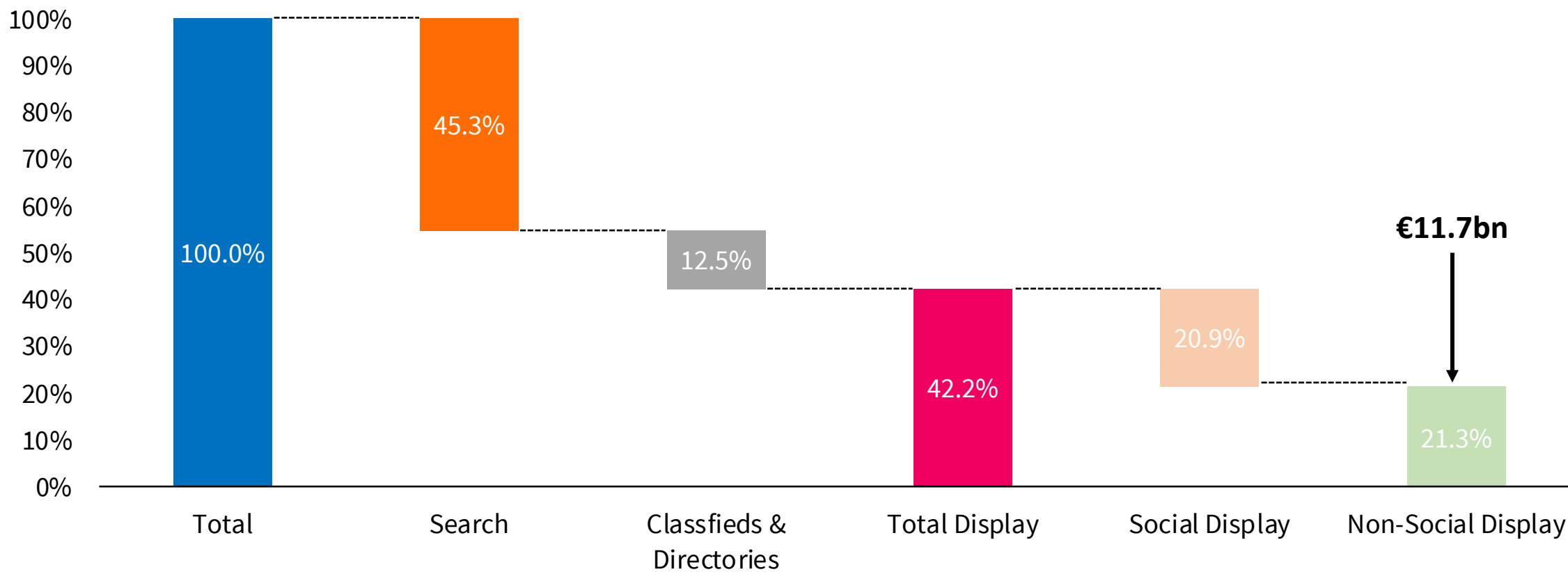
+5.1%

**Non-Social Display
growth in 2018**

Source: IAB Europe AdEx Benchmark 2018 Study

Display excl. social is 21% of the market

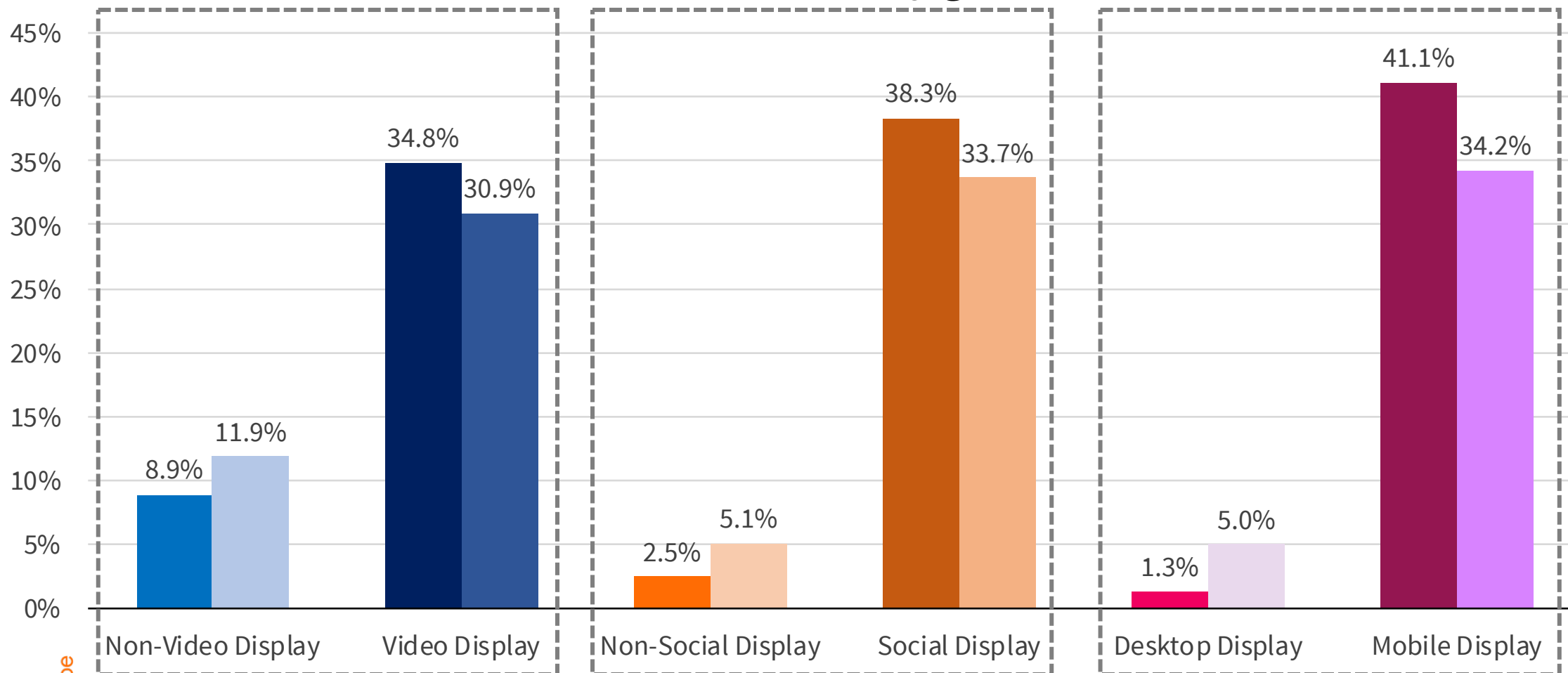
Europe: Total digital ad spend split (2018)



Source: IAB Europe AdEx Benchmark 2018 Study

Trinity of SoMoVi remains - but other sources of growth are emerging

2017 vs 2018: display growth



Source: IAB Europe AdEx Benchmark 2018 Study

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