

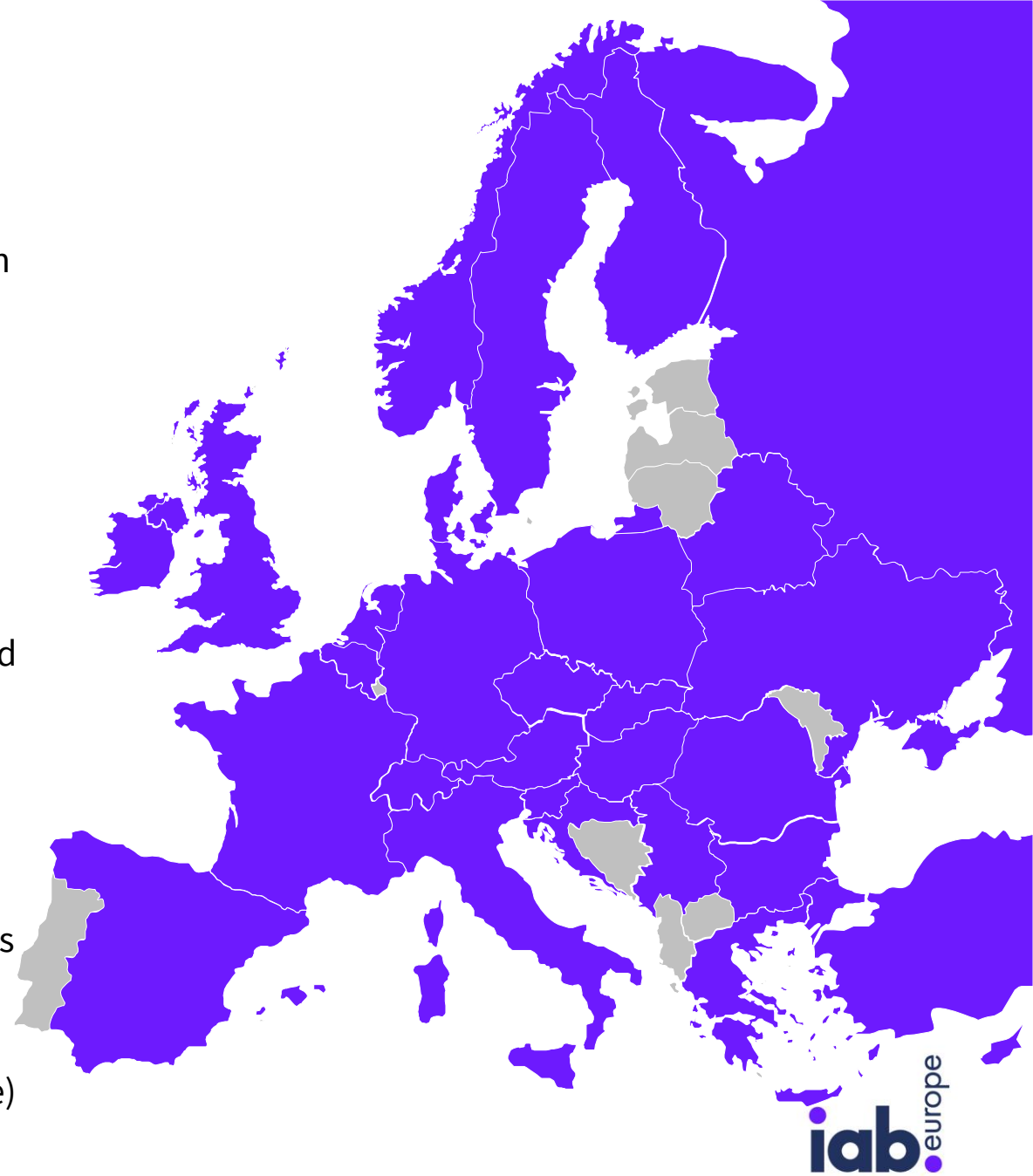
# PROGRAMMATIC ADVERTISING SPEND IN EUROPE 2019

1 October 2020

[iab europe.eu](http://iab europe.eu)

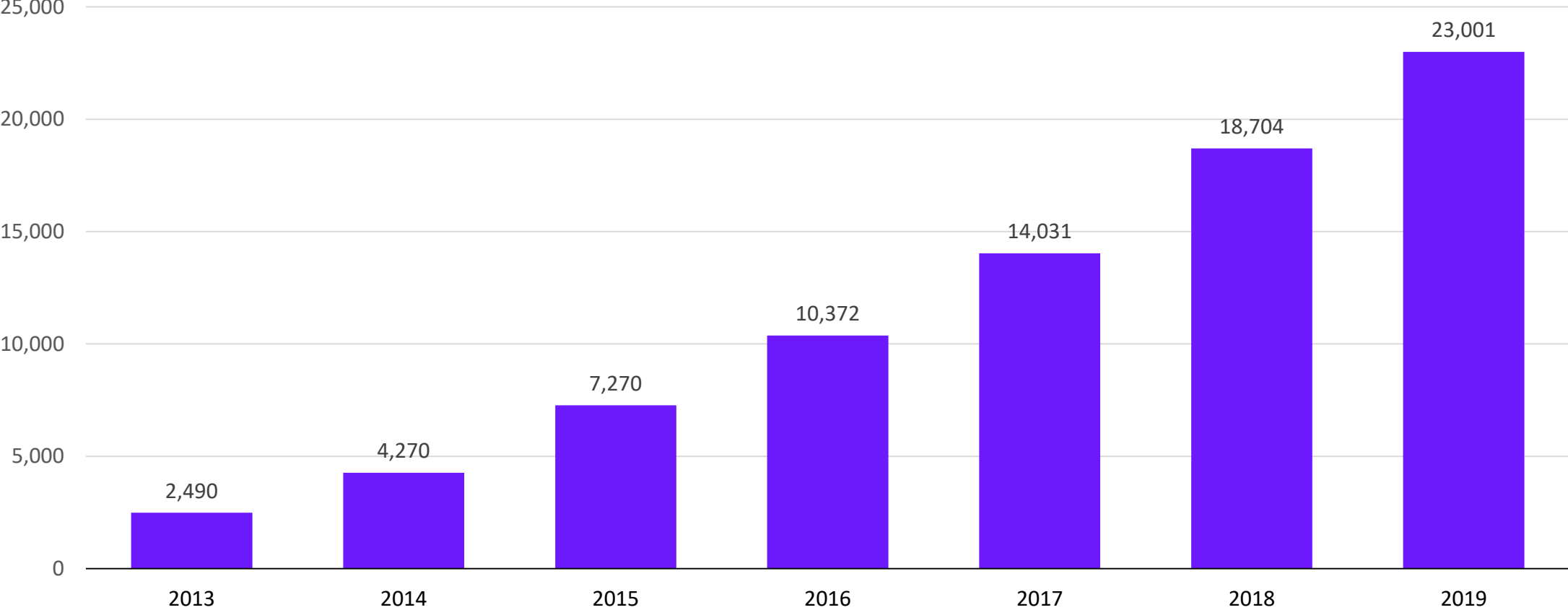
# ABOUT THIS STUDY

- Extension of the [IAB Europe Adex Benchmark Study 2019](#) (released in June 2020)
- The AdEx Benchmark report is the definitive guide to advertising expenditure in Europe covering 28 markets. The report consolidates and harmonises local ad spend data from national IABs to provide a true, like-for-like comparison of European digital ad markets.
- The Programmatic ad spend data presented in this report is collected from IABs, adjusted through company reports, industry interviews, DSP & SSP reports
- Definitions of programmatic vary between countries and market participants: social included here to find common denominator with all countries. Unless stated otherwise, social is included in the figures presented here
- Figures in this study are reported in gross (before publishers' SSP fee)



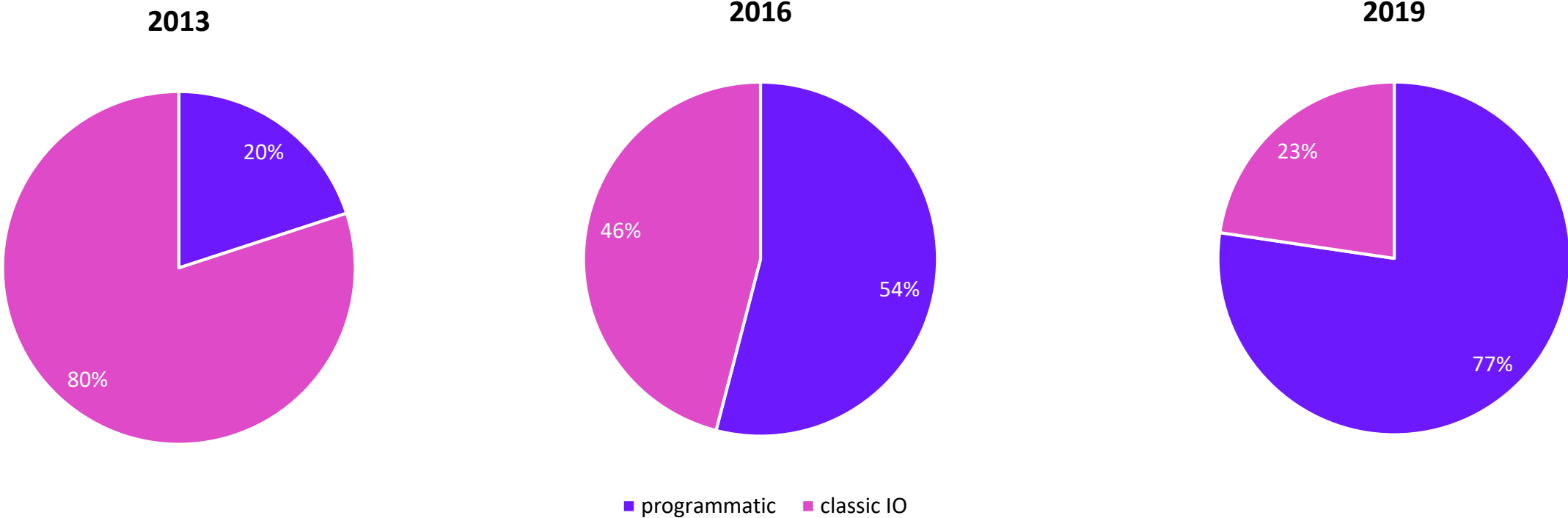
# A €23BN MARKET

Europe: Programmatic Ad Spend (€m)



# OVER 2/3 OF DIGITAL AD SPEND NOW PROGRAMMATIC

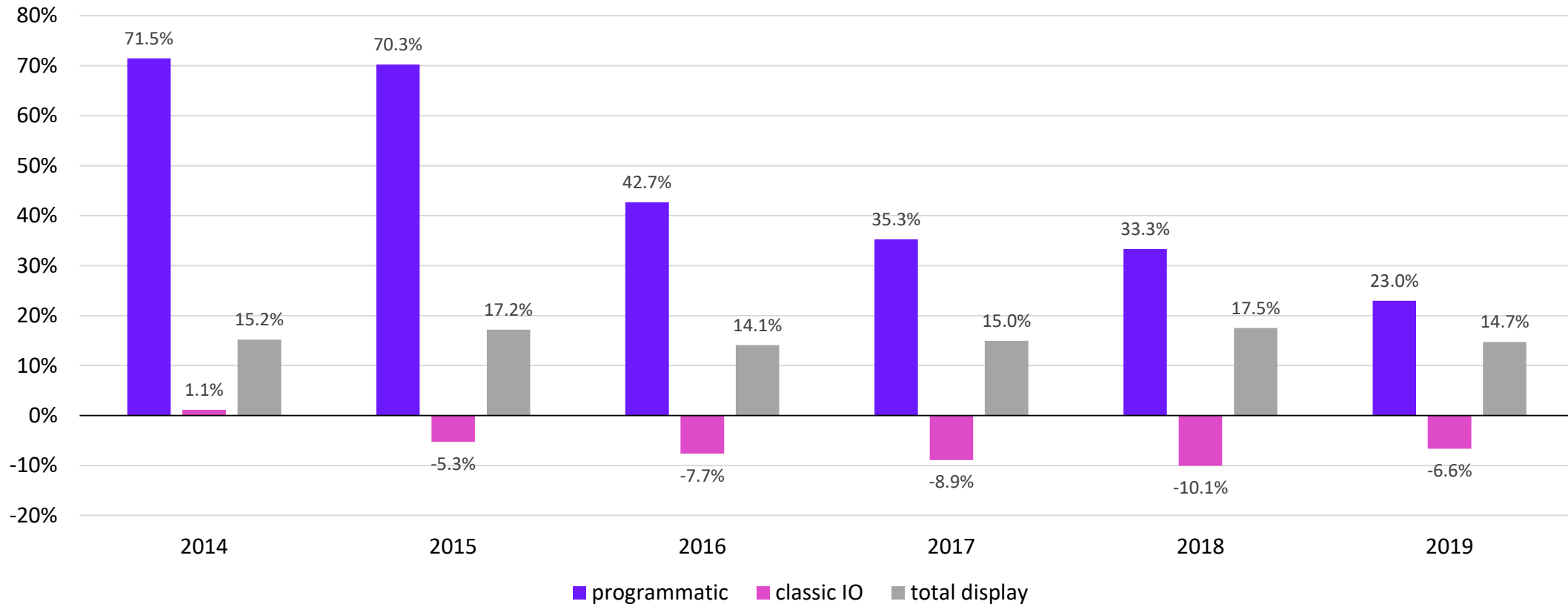
Share of Digital Ad Spend in Europe by Transaction Mechanism\*



\*refers to display spend (incl. banners & video), excl. search, classifieds & directories

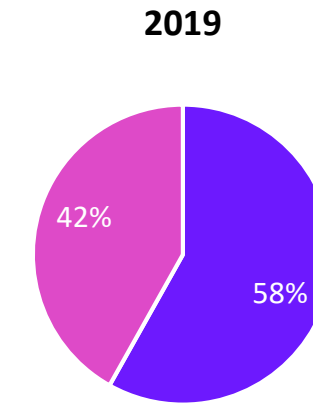
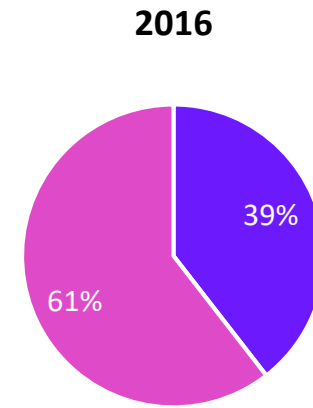
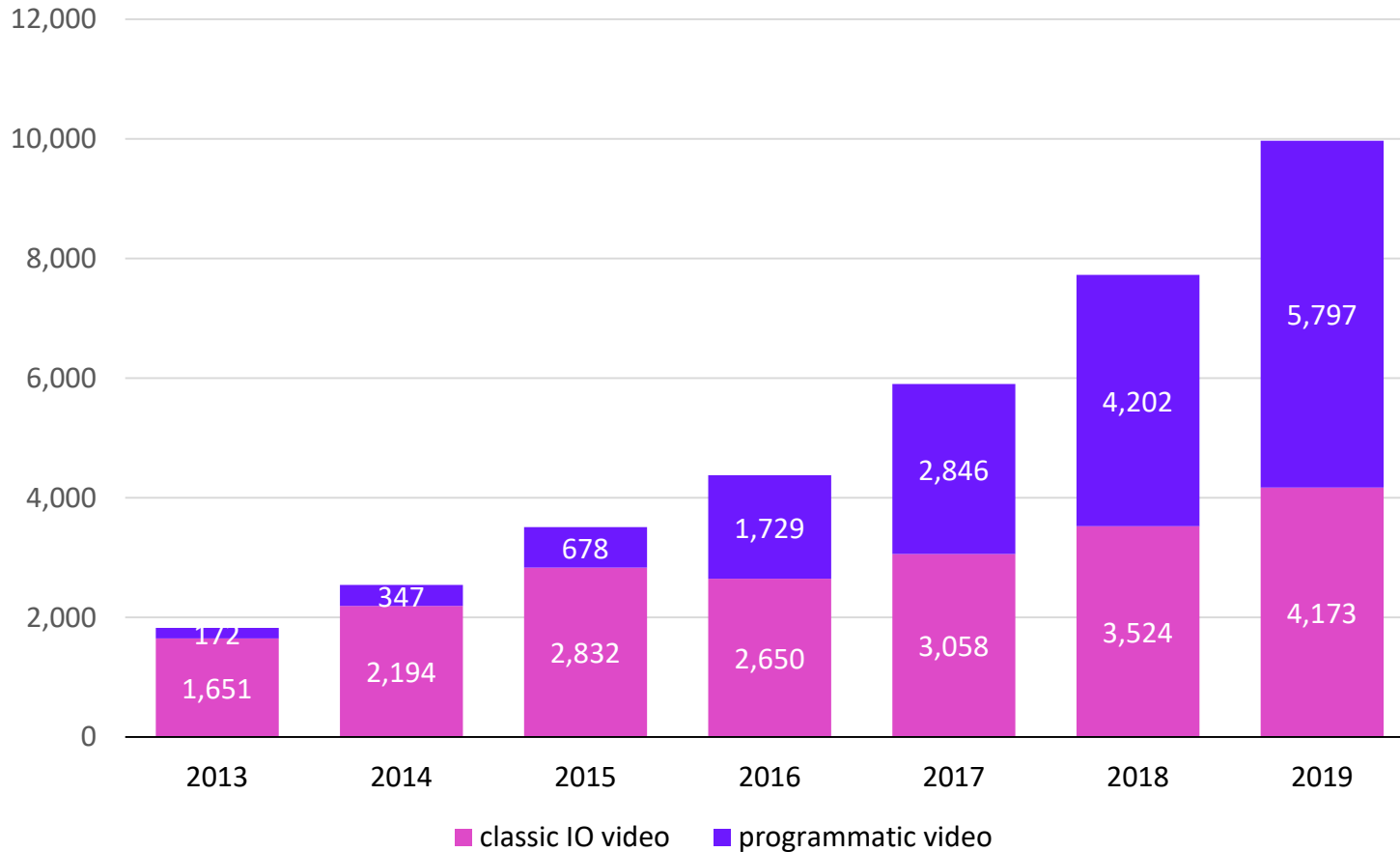
# IO-BASED AD SPEND IN DECLINE AS PROGRAMMATIC GROWS DOUBLE-DIGIT, ALBEIT AT LOWER RATE IN '19 AS MARKET MATURES

Europe: Digital Ad Spend Growth by Transaction Type\*



# OVER 50% OF VIDEO AD SPEND IS TRANSACTED PROGRAMMATICALLY

Europe: Video Ad Spend by Transaction Mechanism (€m)

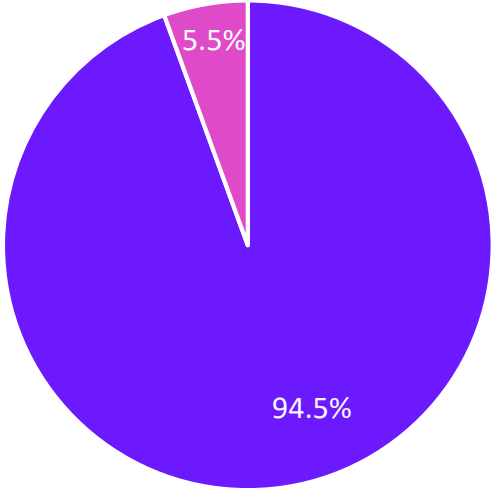


Share of video ad spend by transaction mechanism

# CENTRAL & EASTERN EUROPE (CEE) IS CATCHING UP

Share of programmatic ad spend in Europe by region

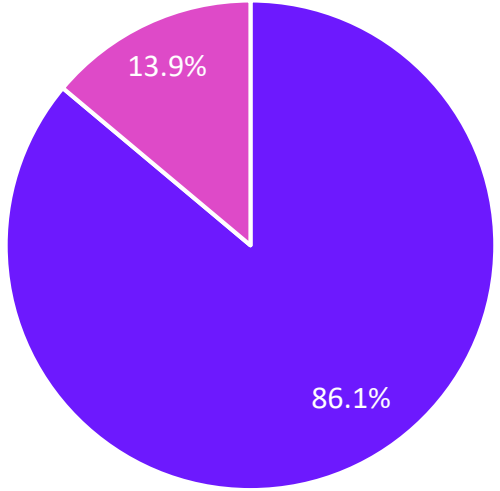
2013



■ WE ■ CEE

CEE share of ad spend for all media in Europe: 11.1%\*

2019



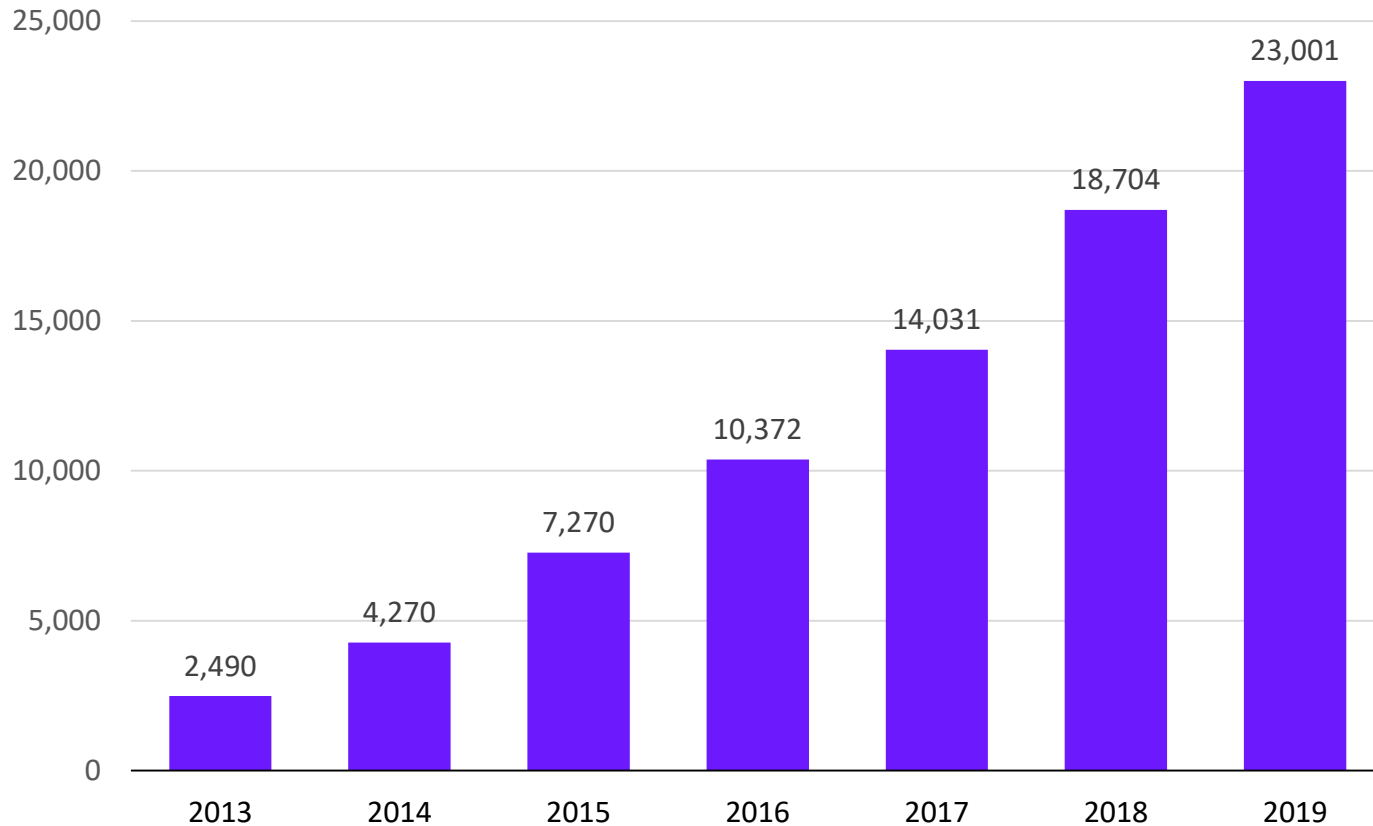
■ WE ■ CEE

CEE share of ad spend for all media in Europe: 14.3%\*

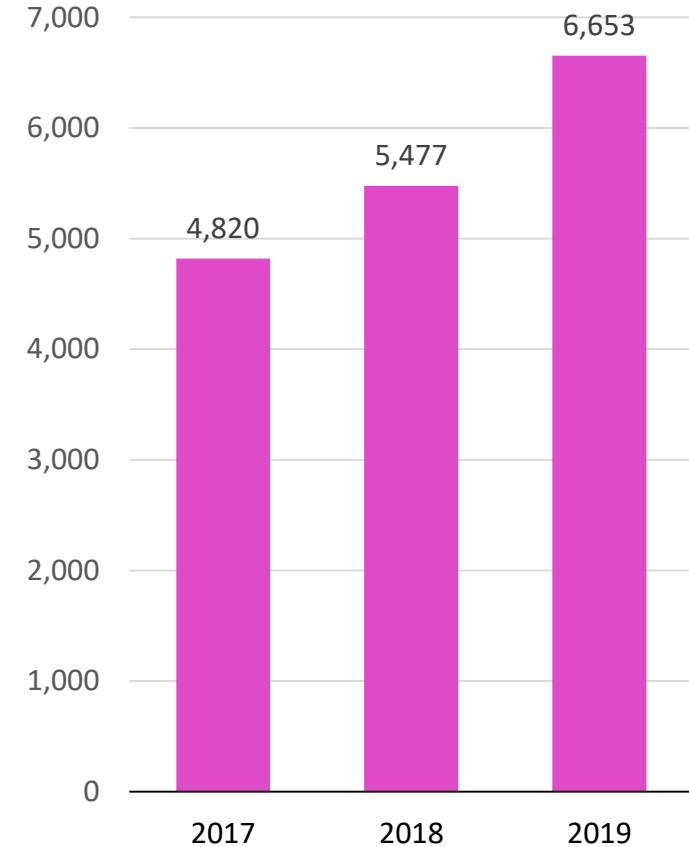
\*TV, Radio, Print, OOH, Cinema, Digital

# PROGRAMMATIC – NARROWER DEFINITION (SPEND TRANSACTED VIA THE OPENRTB PROTOCOL)

Europe: Programmatic Ad Spend (€m)



Europe: Programmatic Ad Spend OpenRTB(€m)





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