
adex

IAB Hungary 2016

Hungarian Digital Ad Spend Study

IAB Adex

Digital Ad Spend Study

IAB Adex

- IAB (Interactive Advertising Bureau) Adex digital ad spend reports are the industry benchmark numbers worldwide
- IAB US publishes its Adex study since 1996
- IAB Europe started to publish its Pan-European Adex study in 2006, IAB Hungary joined in 2008
- Hungarian online ad spend data is available since 2000 (Hungarian Advertising Association's Internet section), from 2008 digital ad spend data (online+mobile) by IAB Hungary

IAB Hungary Adex

**Hungarian Digital Ad Spend
Study**

IAB Hungary Adex

- Goal: providing thorough, accurate data about the Hungarian digital ad spend
- The study analyzes the net* digital ad spend
- IAB Hungary Adex is the industry standard ad spend study, having the following categories:

- **Categories****

- Display
- Search
- Listing
- E-mail

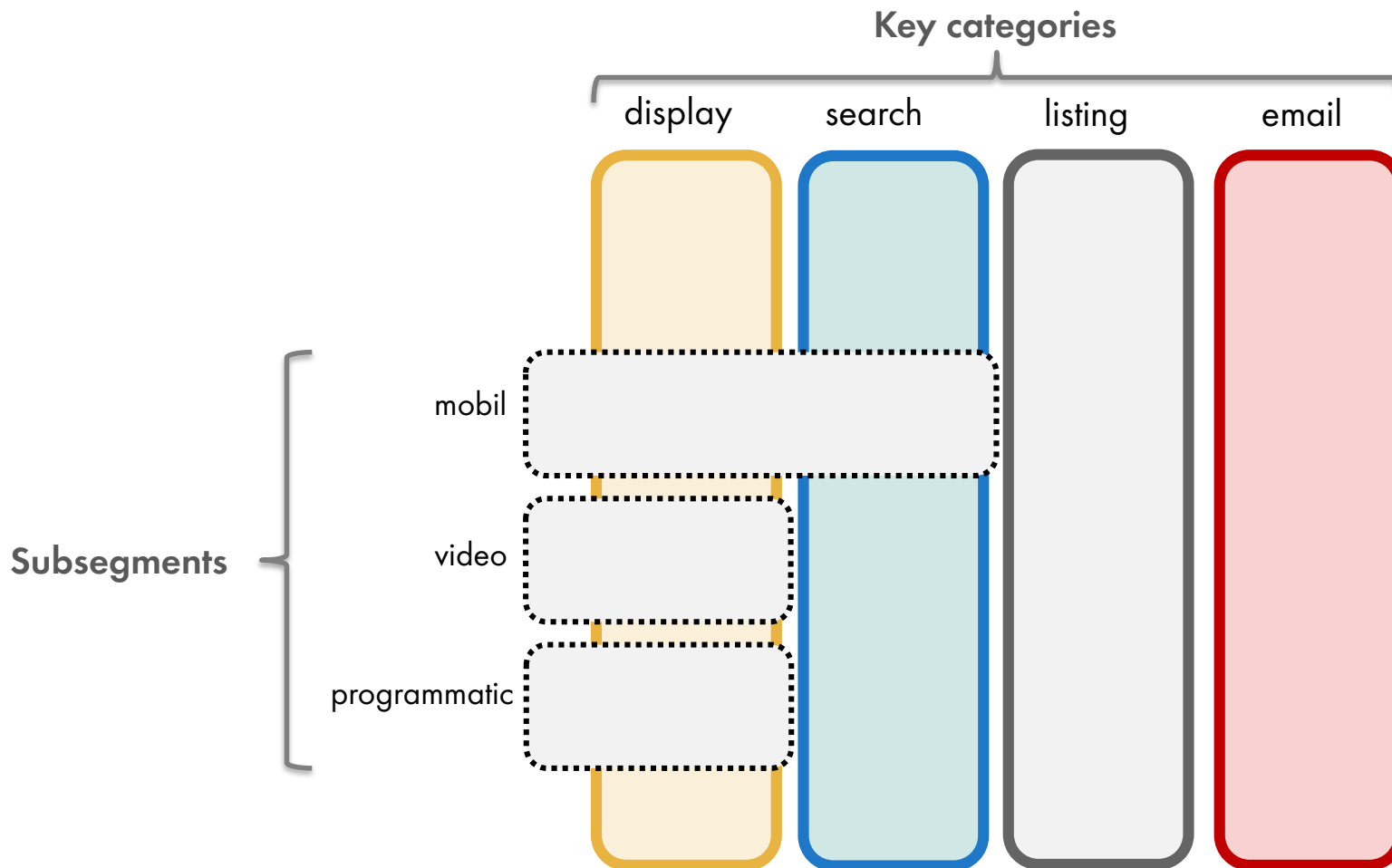
- **Subsegments**

- Mobile
- Video
- Programmatic

* This is equivalent to IAB Europe's "gross" definition

** From 2015 onwards the mobile ad spend is a subsegment while Display and Search include mobile. This change doesn't affect the total.

IAB Hungary Adex structure



* From 2015 onwards the mobile ad spend is a subsegment while Display and Search include mobile. This change doesn't affect the total.

Partners

Partners



IAB Hungary cooperated with PwC Hungary who collected market data, estimations and conducted validation discussions.



Online Section of Hungarian Communication Agencies' Association (MAKSZ) helped our work with providing aggregated agency data.

Methodology

IAB Hungary Adex 2016 methodology

- Report is based on data supplied by companies and estimations by experts
 - Display: data collection and estimation (for global players)
 - Search: estimation (for global players)
 - Listing: estimation
 - Email: data collection and estimation
 - Subsegments (mobile, video, automated): data collection and estimation (for global players)

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Key takeaways

- Strong, 22% growth
- Mobile share is 27% within display
(85% of mobile ad spend goes to global players)
- Programmatic spend surpassed 1 billion HUF
- Local media players' market share of digital ad spend below 50% for the first time

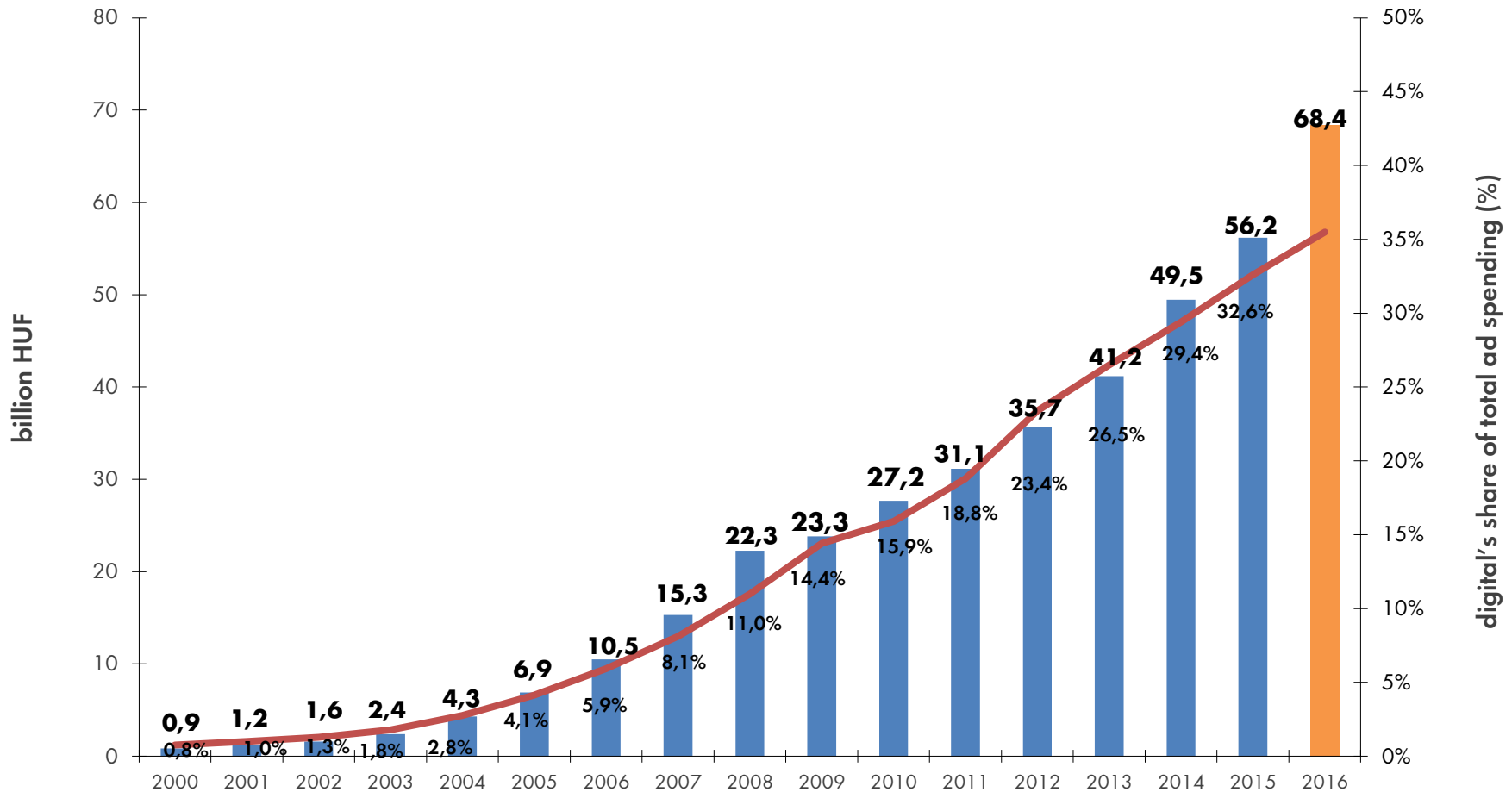
2016 Digital ad spend

68,38 billion HUF

+ 22% YoY

Net data

Digital ad spend in Hungary

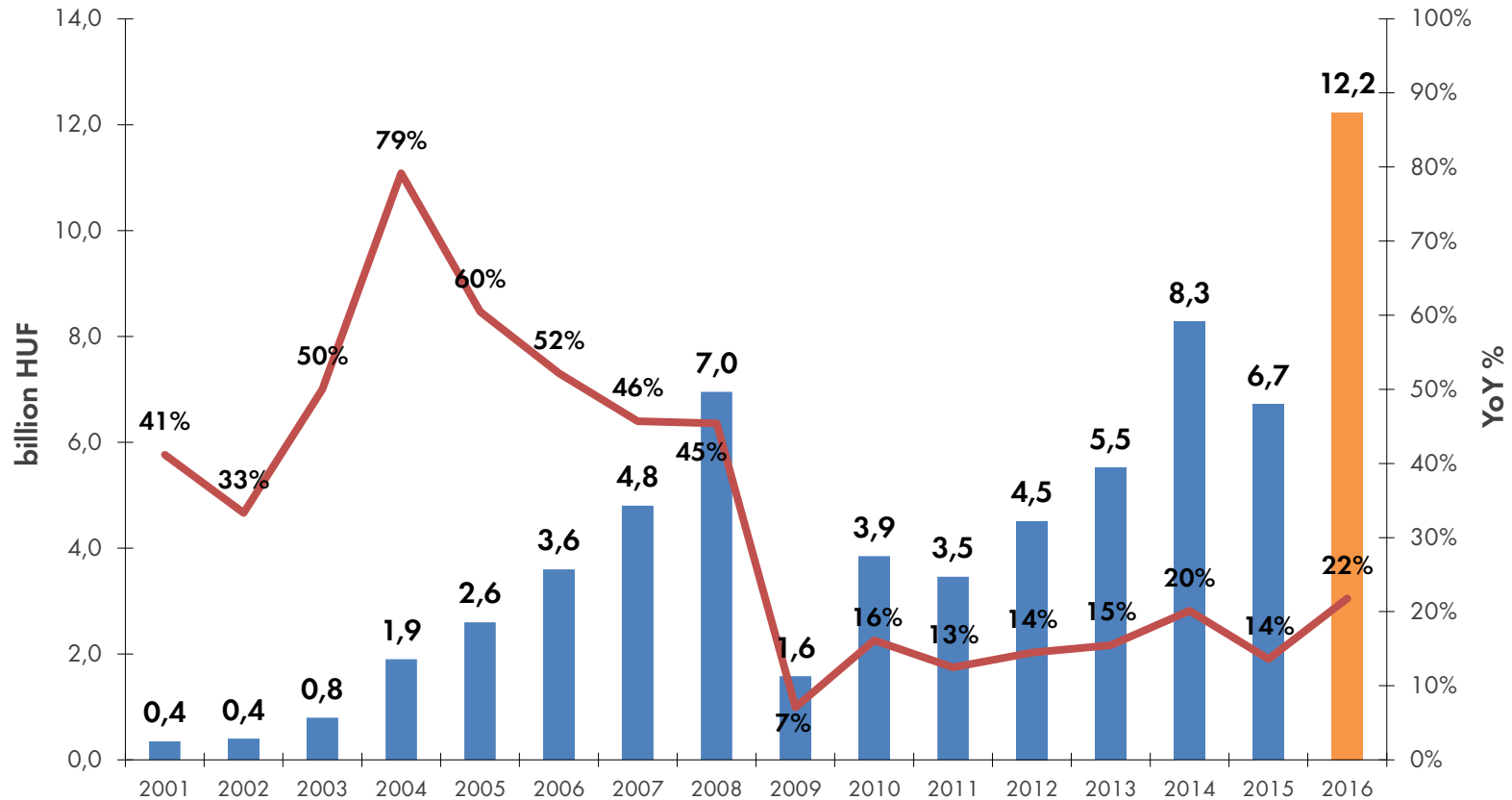


Net data

* 2011-2016: net-net digital / net-net total ad spending (without DM)

+22%, +12,2 bln HUF (YoY)

Growth of digital advertising



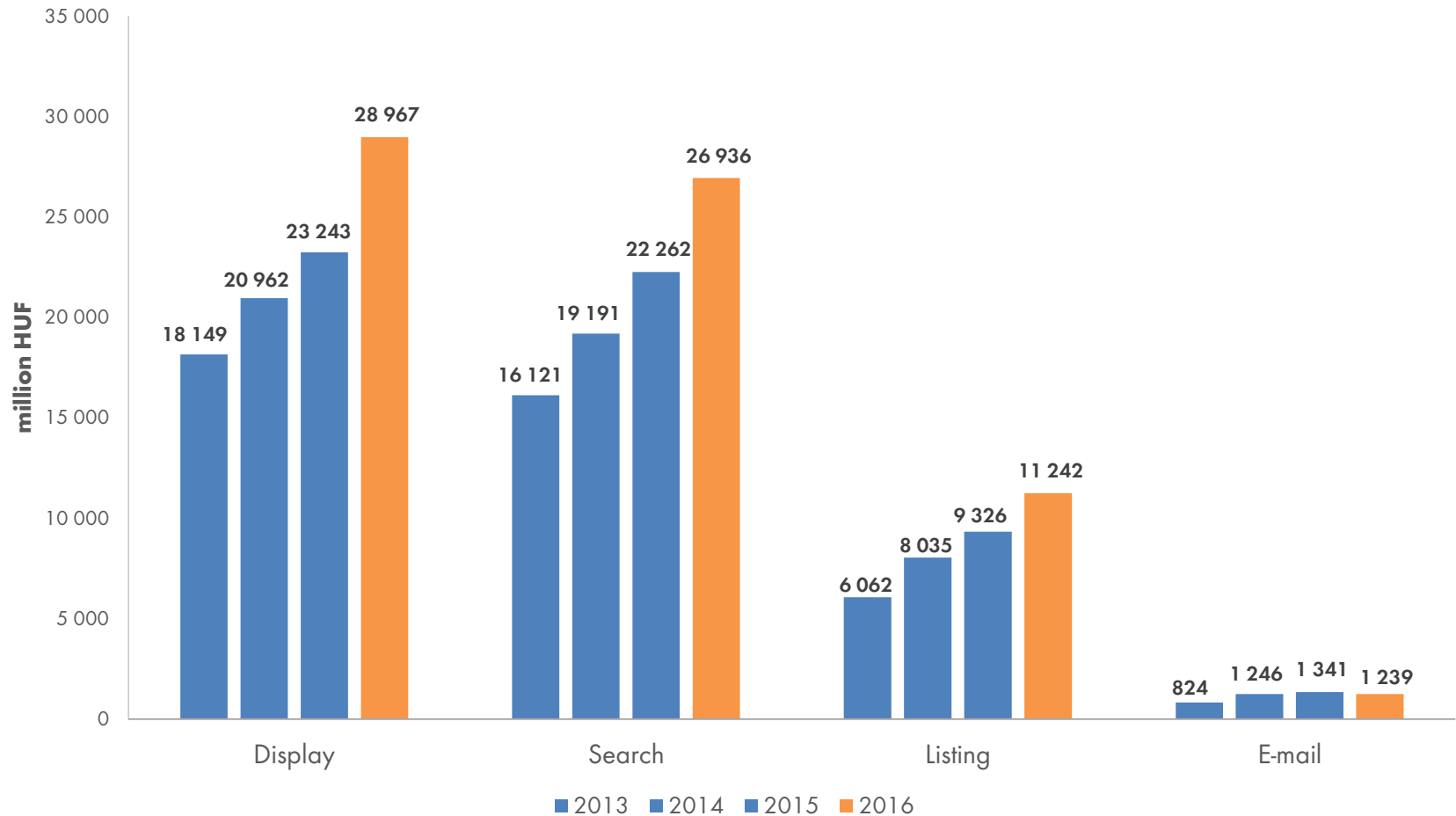
Net data

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Segment Data

Display – search – listing – email

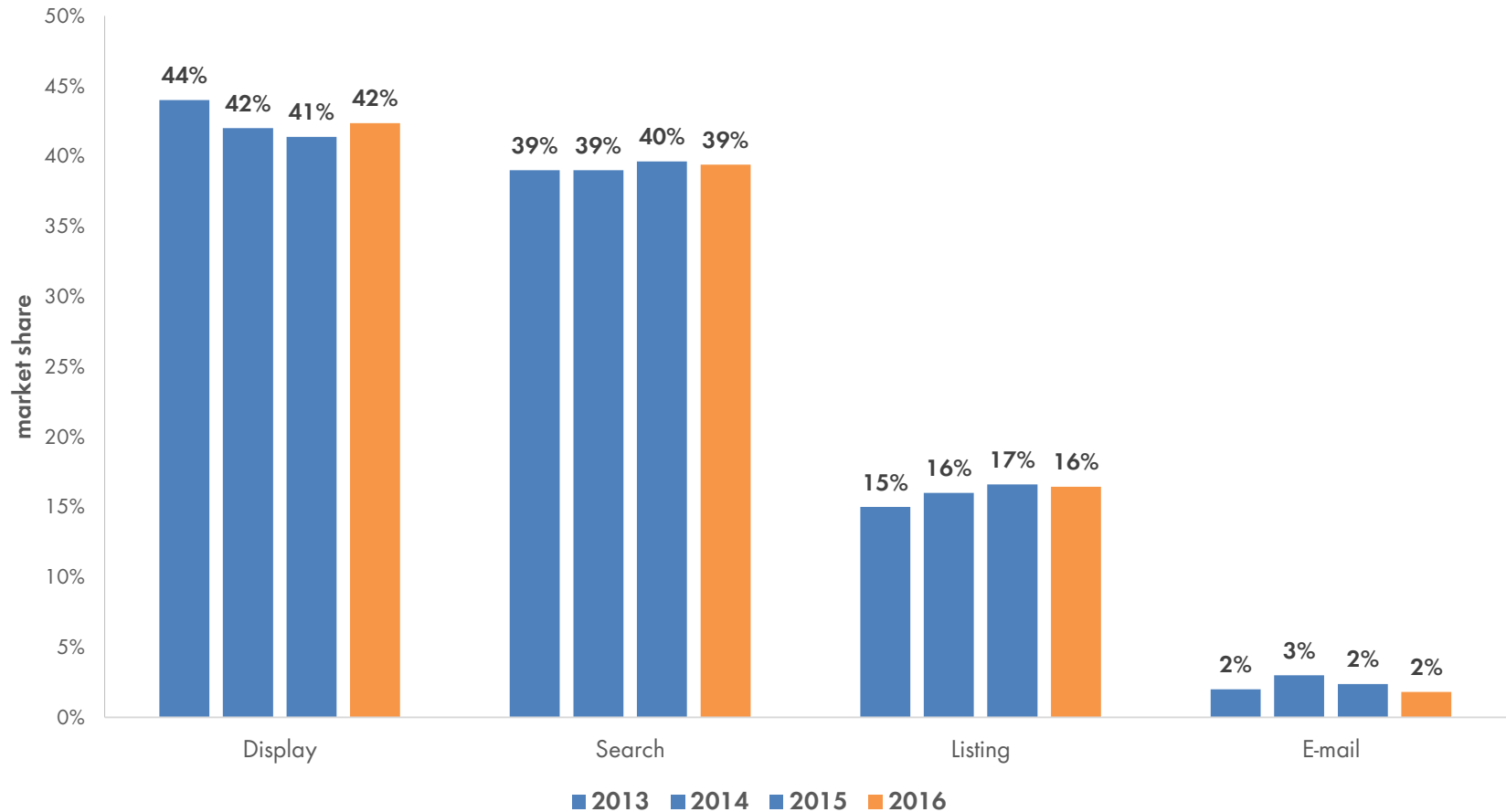
growth in each category except e-mail



Net data

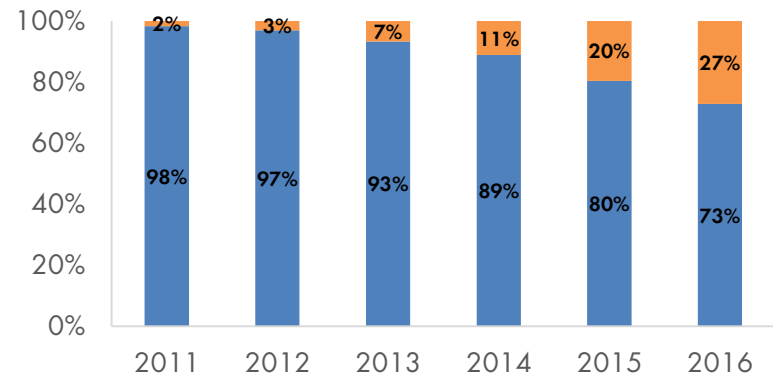
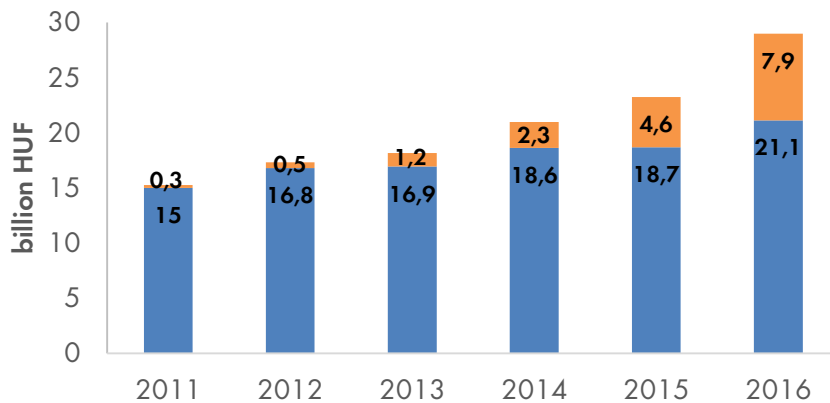
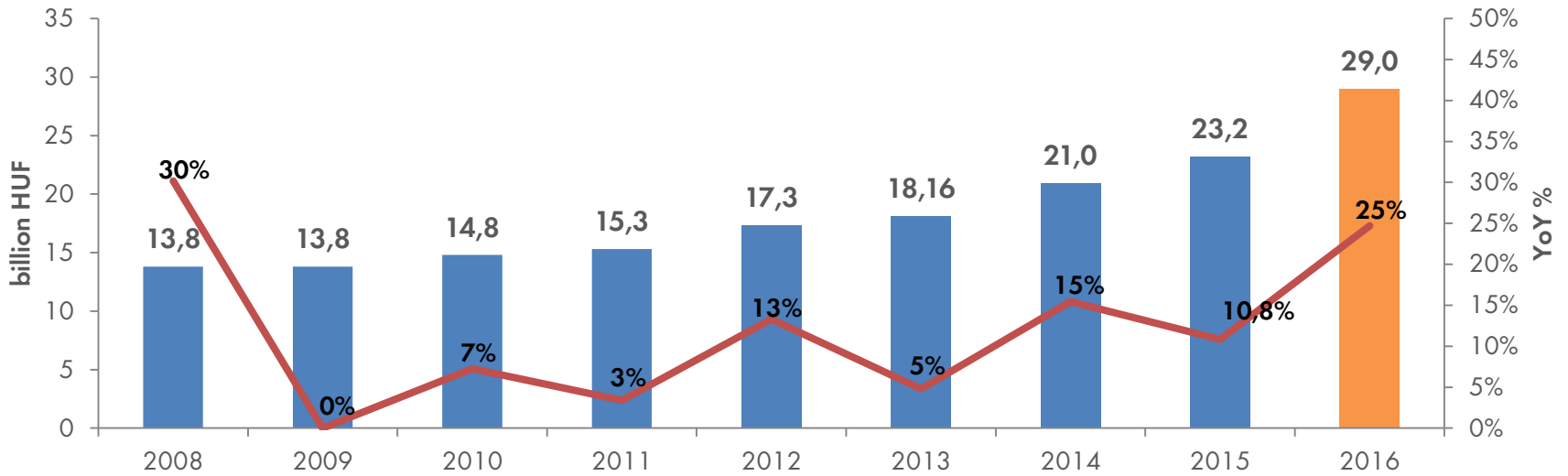
Display – search – listing – email

segments' market share is steady



Display: +25% growth

mobile's share in display is 27%



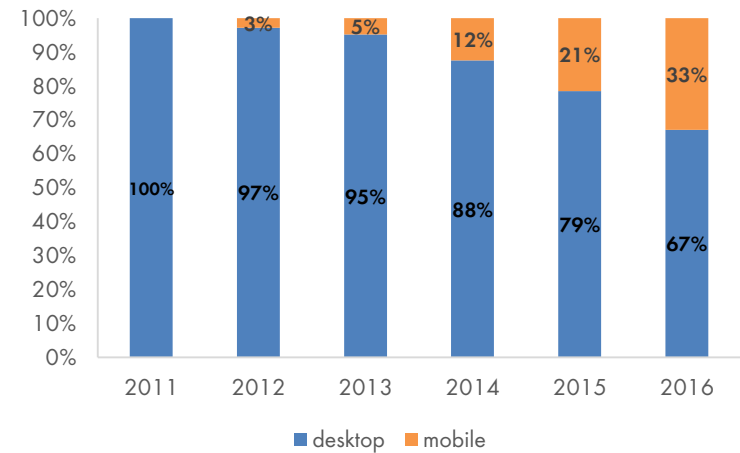
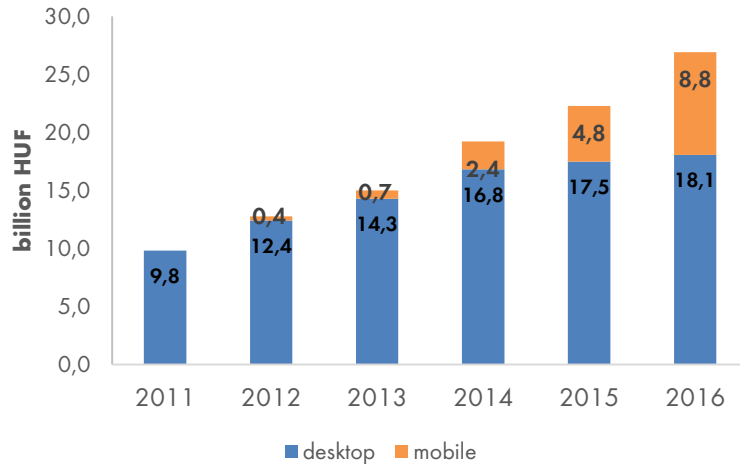
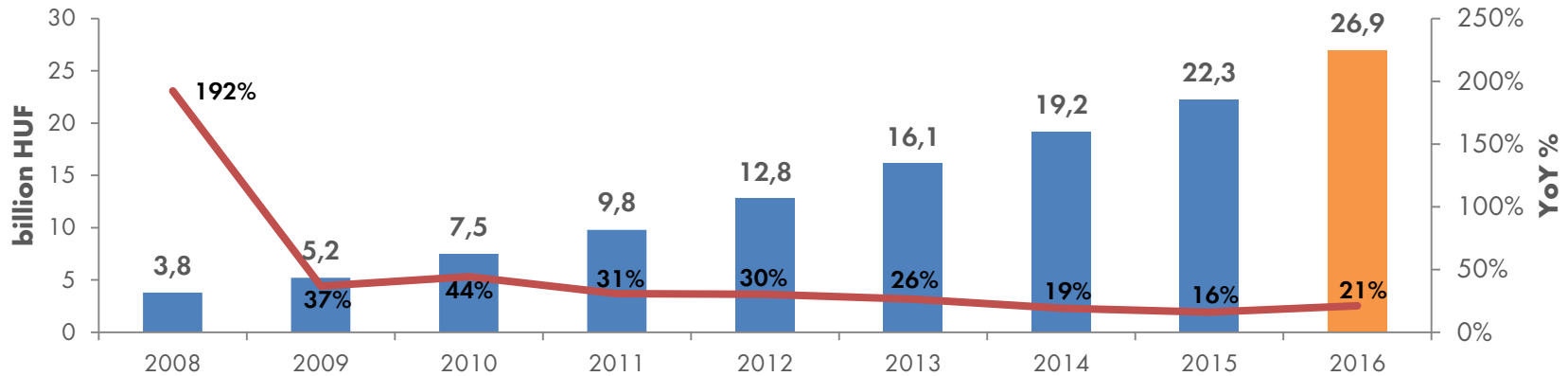
■ desktop ■ mobile

■ desktop ■ mobile

Net data, rounded values

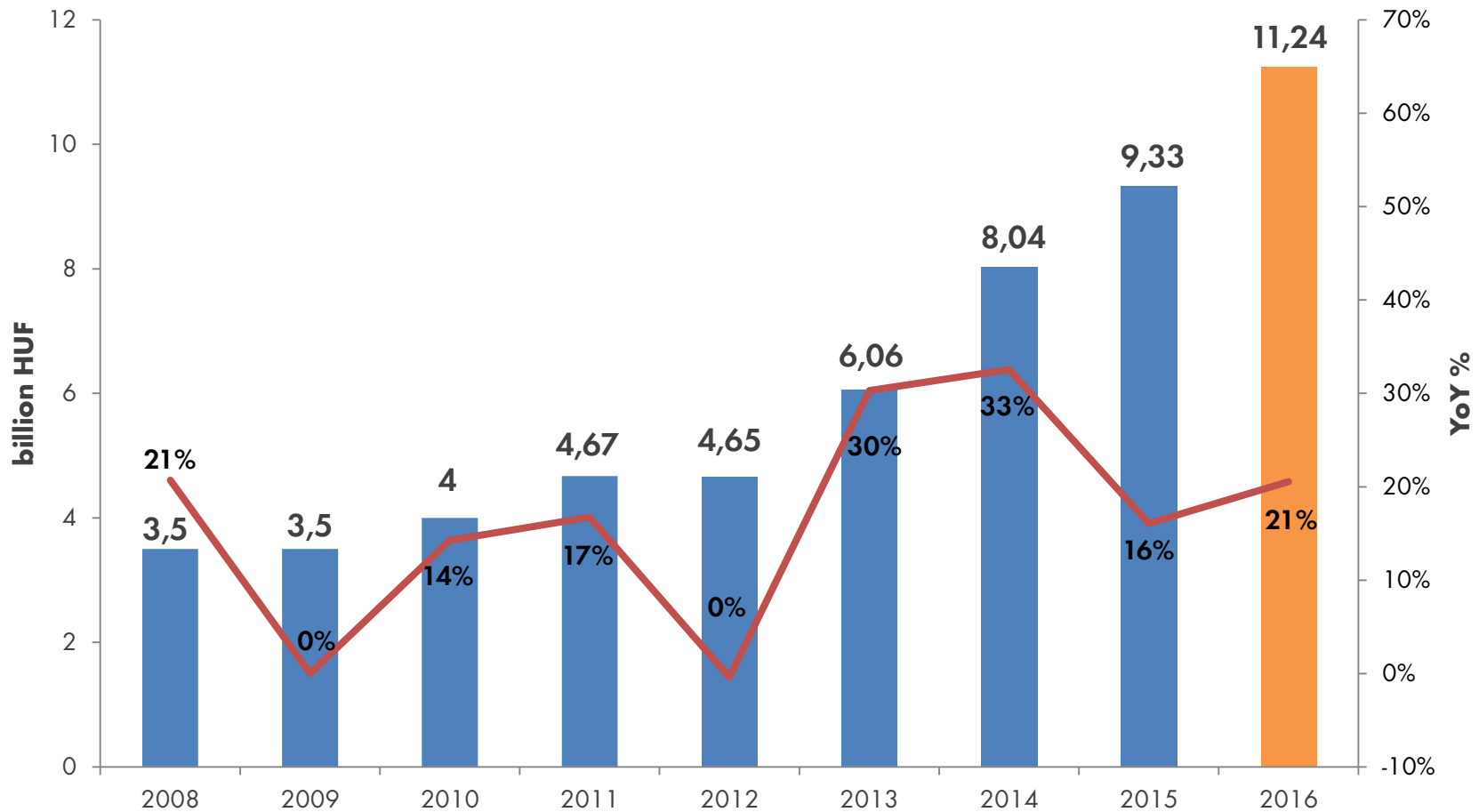
Search: +21% growth

mobile's share is 33%



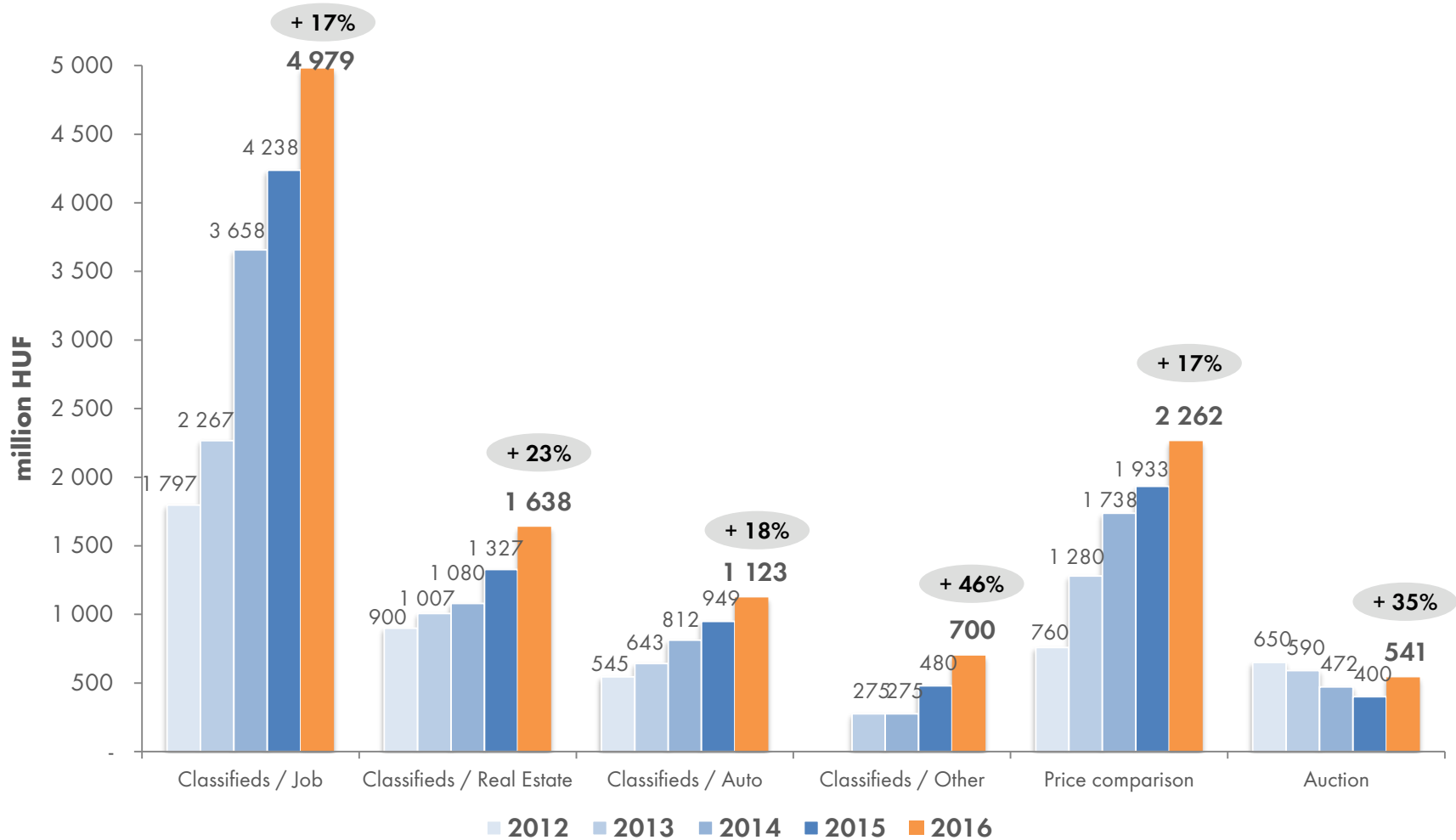
Net data, rounded values

Listing: +21% growth



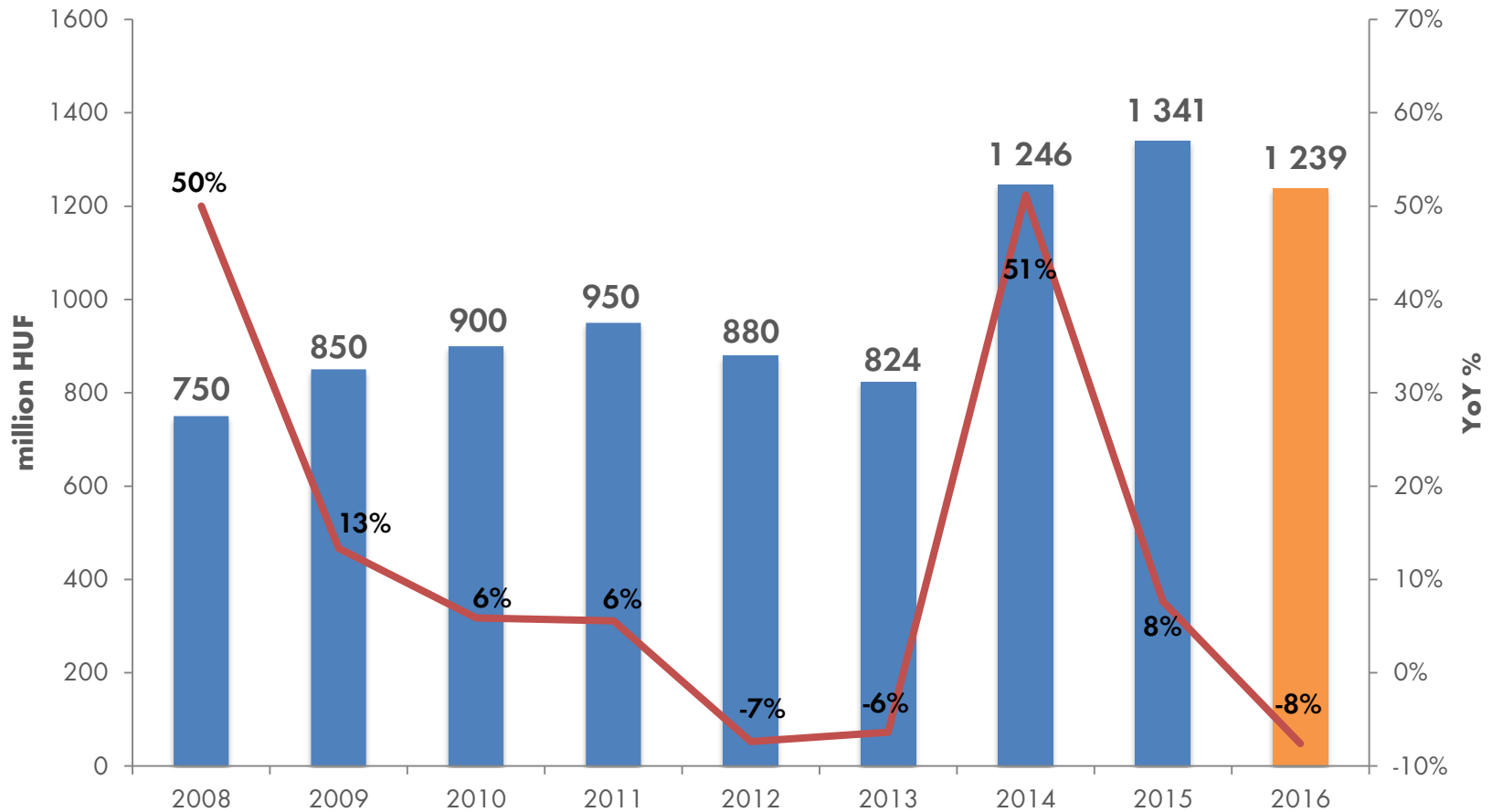
Net data

Listing subsegments



Net data

E-mail marketing



Net data

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Subsegments

Mobile ad spend

79% growth

Market share *

1%

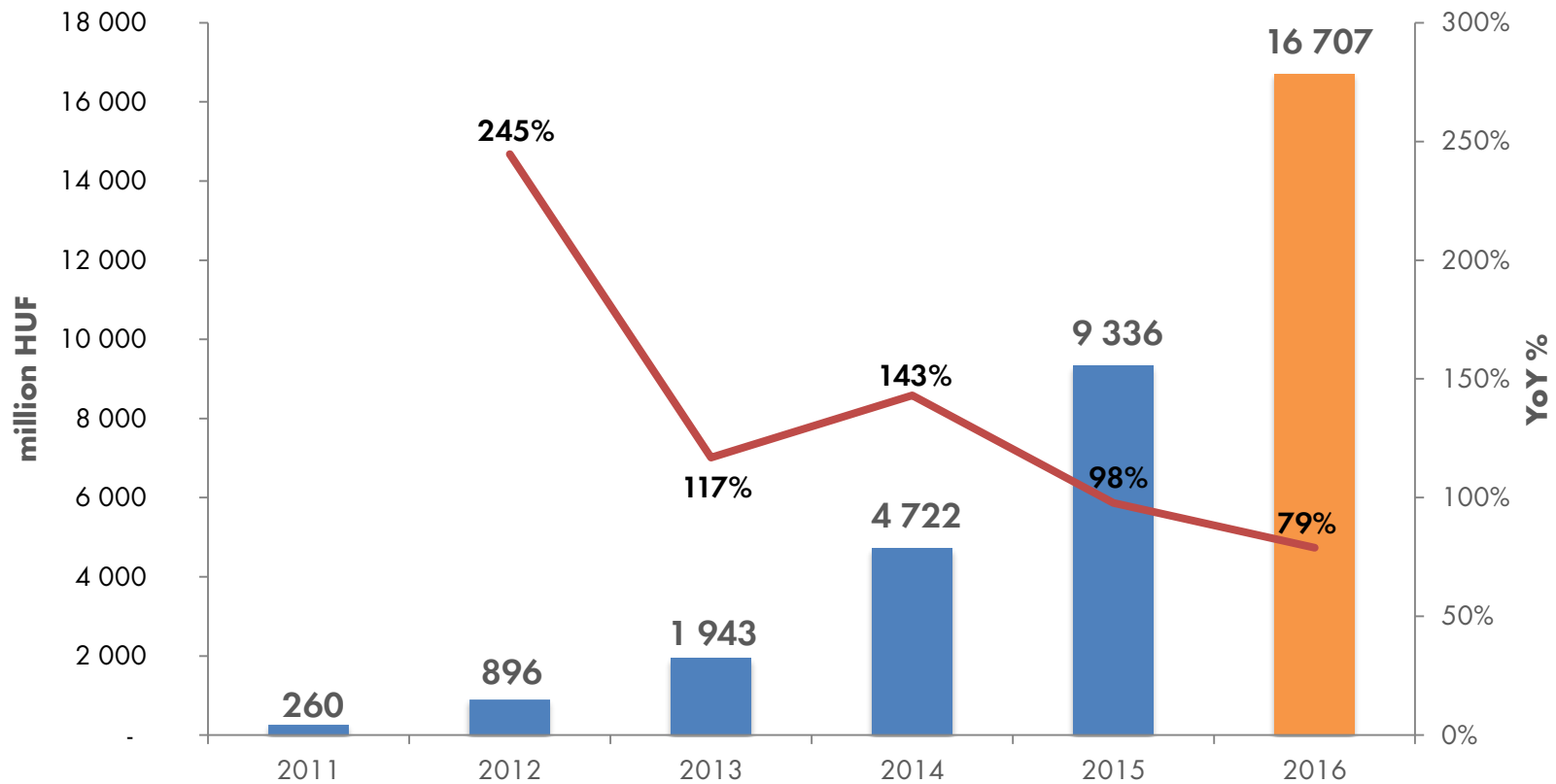
3%

6%

12%

21%

30%

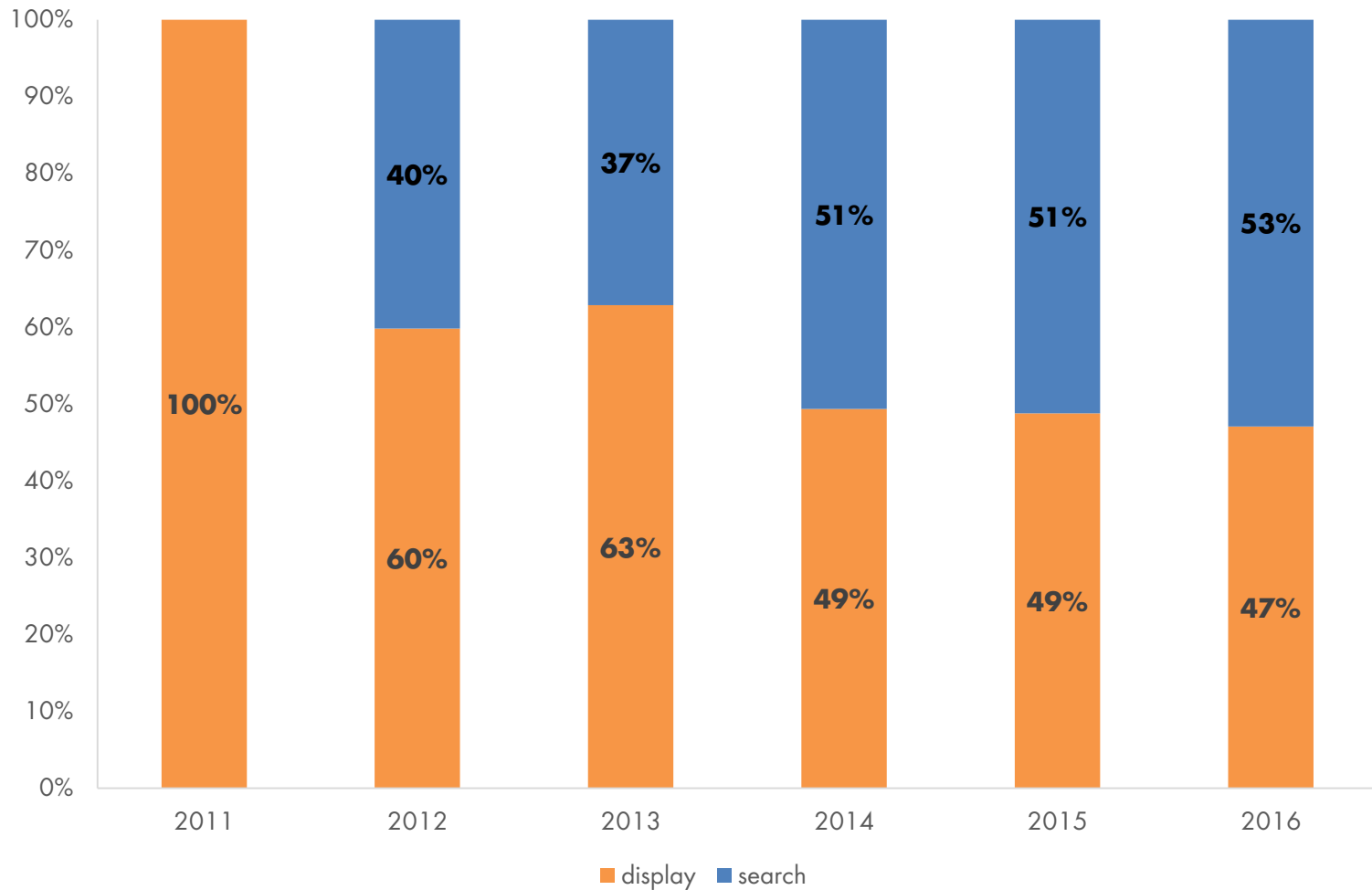


Net data

* Compared to relevant segment (Display+Search)

Mobile

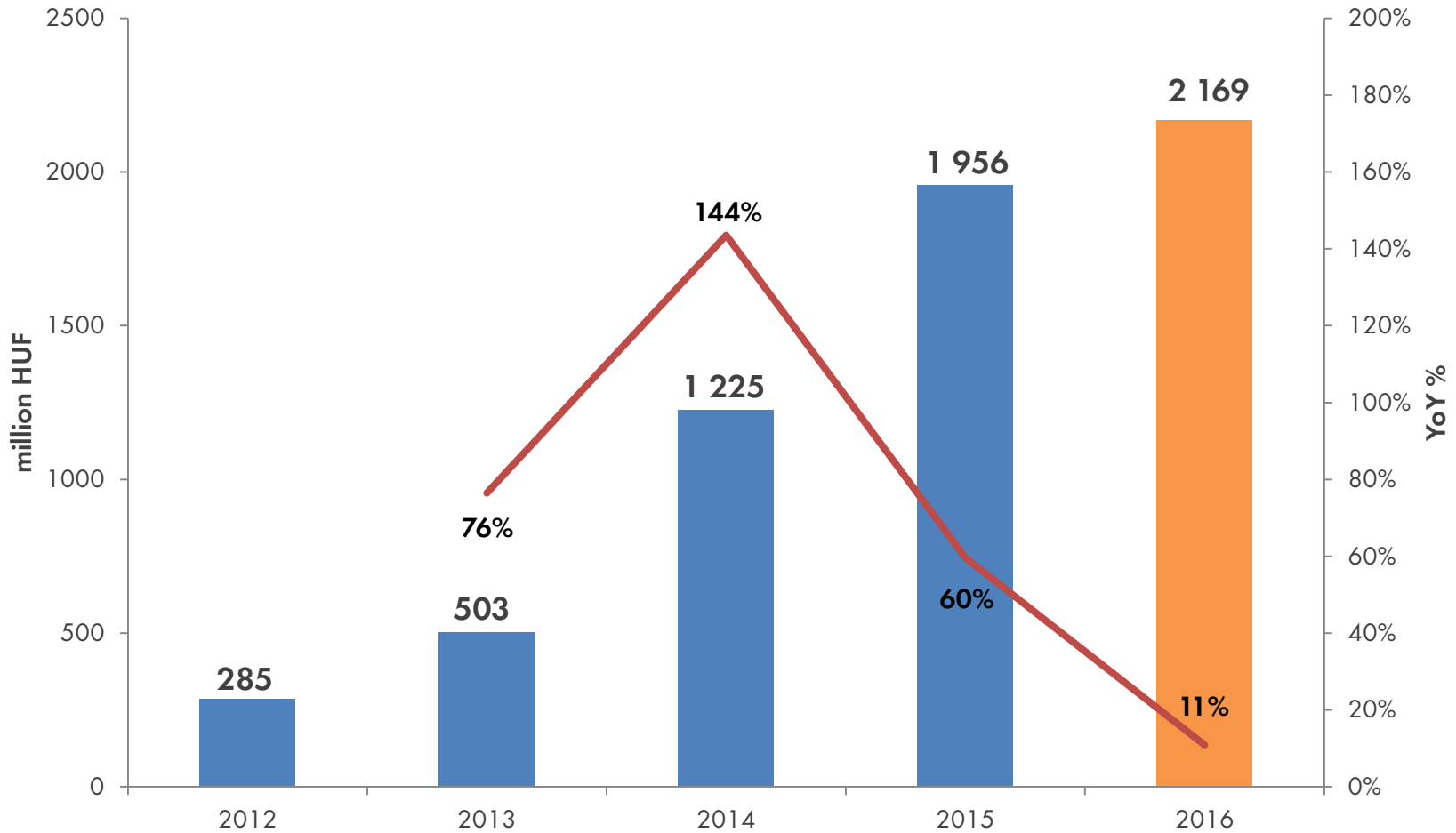
share of display & search



Net data

Video

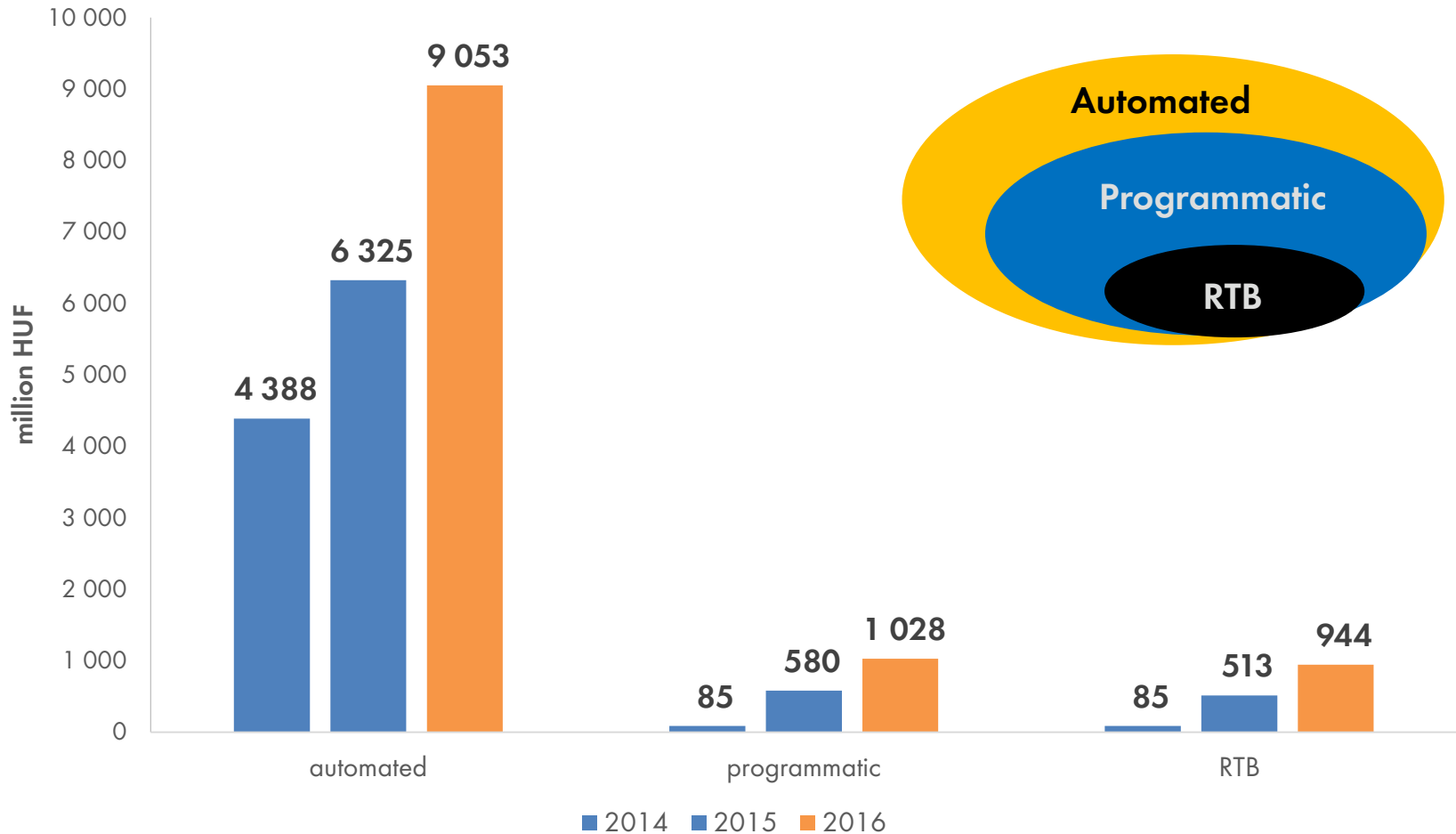
steady growth



Net data

Automated trading

programmatic: 77% growth and surpassed 1 bln HUF!



Net data

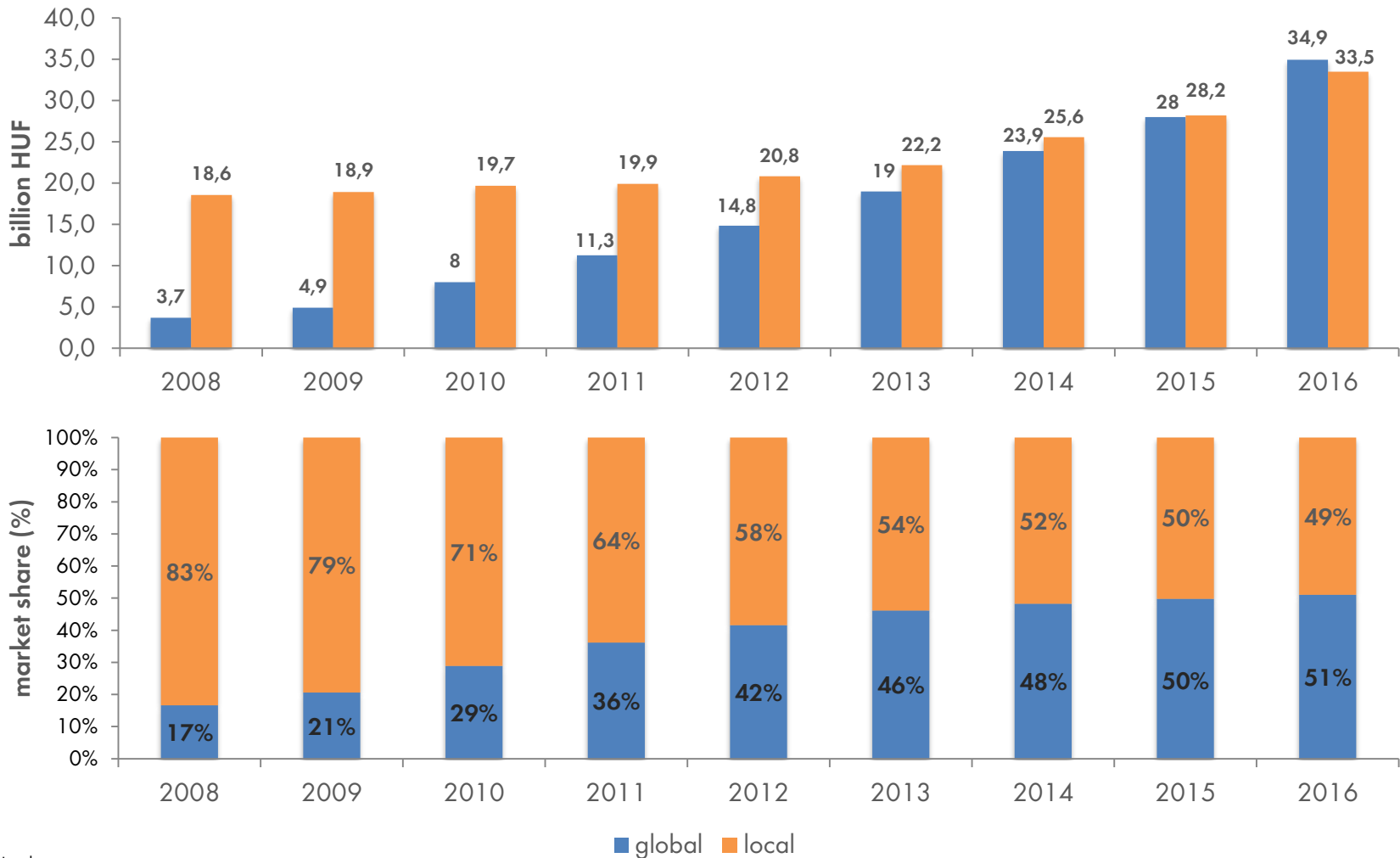
Explanation: Google (non-search) and Facebook spend are automated, but not programmatic

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**Ad spend on Local – Global
media players**

Local – Global trend

milestone: global share is above 50%

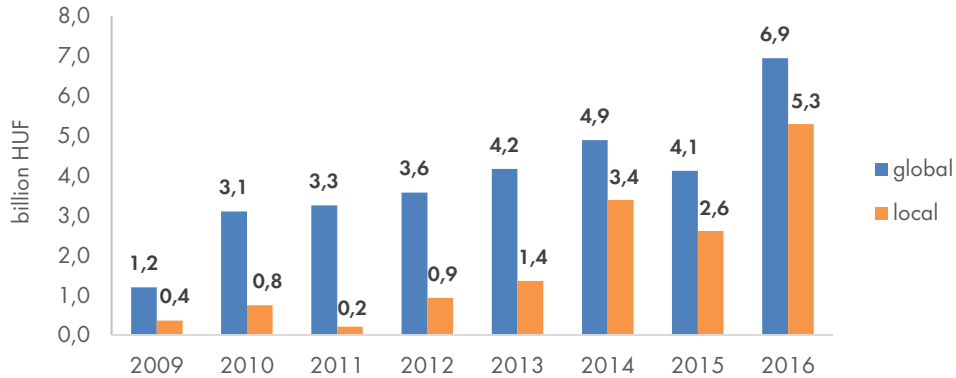


Net data

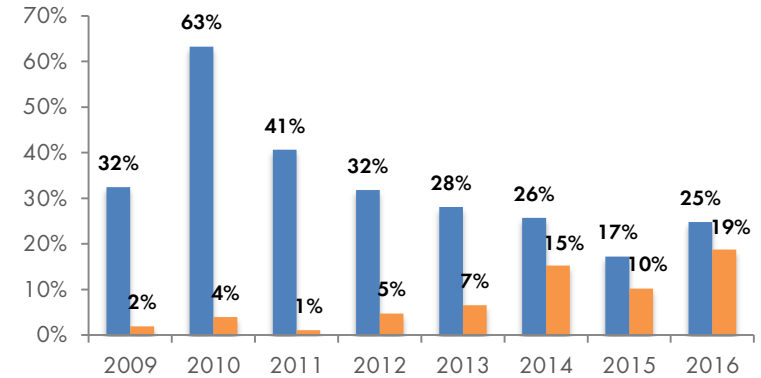
Local – Global trend

growth of ad spending still higher on global players

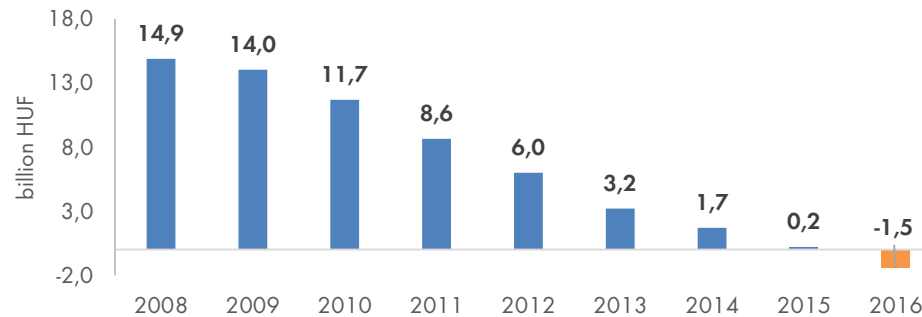
YoY growth (billion HUF)



YoY growth (%)



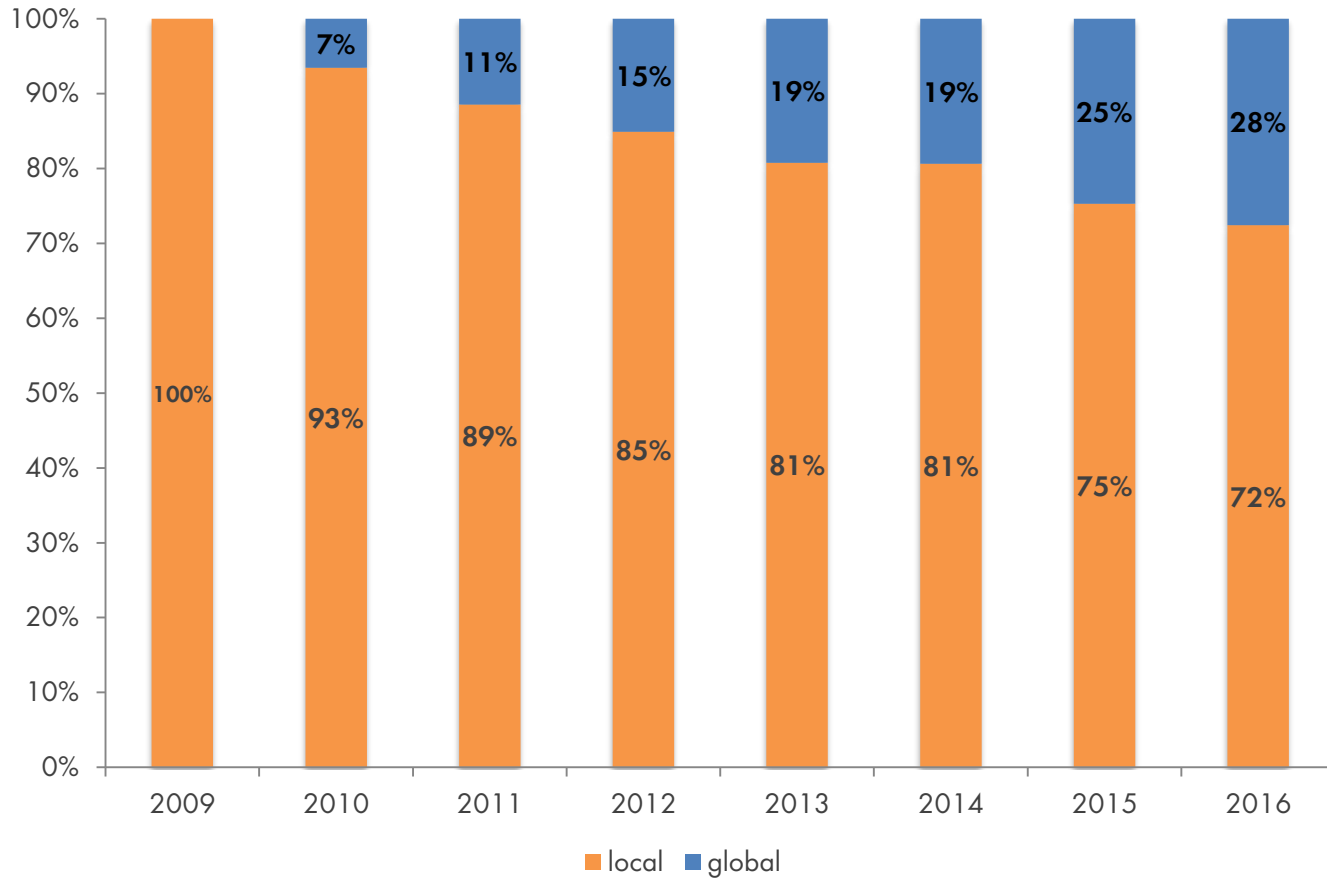
Difference between ad spendings on global - local players



Net data

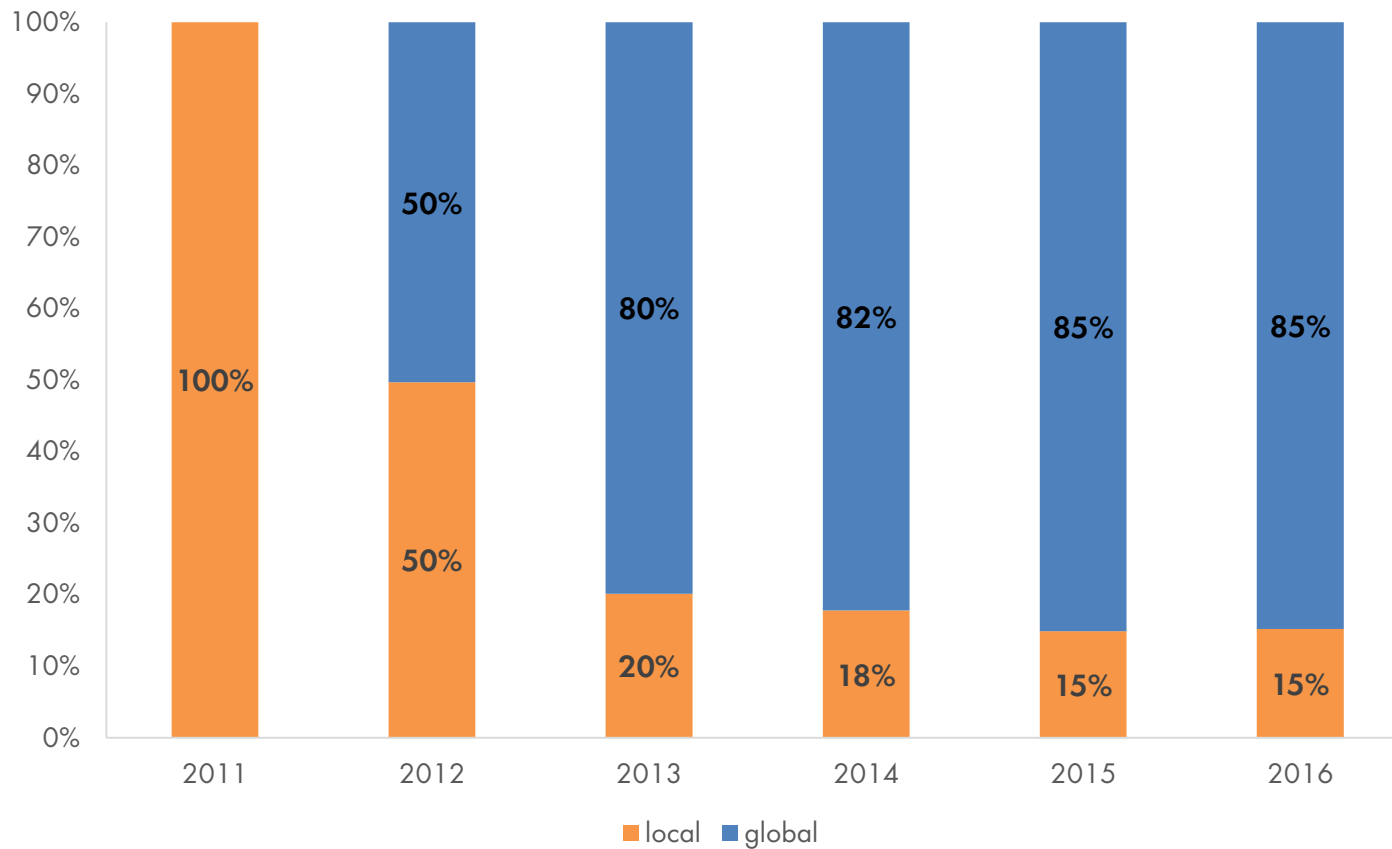
Local – Global trend

display: global players are gaining share



Local – Global trend

mobile: global dominance



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Appendix

Digital Ad Market 2013-2016

Key categories (YoY, share)

	2013 spend	2014 spend	2015 spend	2016 spend	Change 2016/2015	Share
Display	18 149 mln HUF	20 962 mln HUF	23 243 mln HUF	28 967 mln HUF	25%	42%
Search	16 121 mln HUF	19 191 mln HUF	22 262 mln HUF	26 936 mln HUF	21%	39%
Listing	6 062 mln HUF	8 035 mln HUF	9 326 mln HUF	11 242 mln HUF	21%	16%
E-mail	824 mln HUF	1 246 mln HUF	1 341 mln HUF	1 239 mln HUF	-8%	2%
Total	41 155 mln HUF	49 433 mln HUF	56 172 mln HUF	68 385 mln HUF	22%	-

Net data

Digital Ad Market 2013-2016

Subsegments (YoY, share)

	2013 spend	2014 spend	2015 spend	2016 spend	Change 2016/2015	Share
Mobil	1 943 mln HUF	4 722 mln HUF	9 336 mln HUF	16 707 mln HUF	79%	24%

	2013 spend	2014 spend	2015 spend	2016 spend	Change 2016/2015	Share
Total automated	- mln HUF	4 388 mln HUF	6 325 mln HUF	9 053 mln HUF	43%	13%
<i>Programmatic</i>	- mln HUF	85 mln HUF	580 mln HUF	1 028 mln HUF	77%	1,5%
<i>RTB</i>	- mln HUF	85 mln HUF	513 mln HUF	944 mln HUF	84%	1,4%

	2013 spend	2014 spend	2015 spend	2016 spend	Change 2016/2015	Share
Video spend	503 mln HUF	1 225 mln HUF	1 956 mln HUF	2 169 mln HUF	11%	3%

Net data

Digital Ad Market 2013-2016

Listing subsegments (YoY, share)

	2013 spend	2014 spend	2015 spend	2016 spend	Change 2016/2015	Share
Listing	6 062 mln HUF	8 035 mln HUF	9 326 mln HUF	11 242 mln HUF	21%	16%
1. Classifieds	3 917 mln HUF	5 550 mln HUF	6 513 mln HUF	7 739 mln HUF	19%	11%
Auto	643 mln HUF	812 mln HUF	949 mln HUF	1 123 mln HUF	18%	2%
Job	2 267 mln HUF	3 658 mln HUF	4 238 mln HUF	4 979 mln HUF	17%	7%
Real estate	1 007 mln HUF	1 080 mln HUF	1 327 mln HUF	1 638 mln HUF	23%	2%
2. Price comparison	1 280 mln HUF	1 738 mln HUF	1 933 mln HUF	2 262 mln HUF	17%	3%
3. Auction	590 mln HUF	472 mln HUF	400 mln HUF	541 mln HUF	35%	1%
4. General classifieds	275 mln HUF	275 mln HUF	480 mln HUF	700 mln HUF	46%	1%

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