

# adex

## 2018

Digital Ad Spend Study for 2018

# IAB ADEX DIGITAL AD SPEND STUDY

- IAB (Interactive Advertising Bureau) AdEx reports are the industry benchmark numbers worldwide
- The first AdEx report was published for the US market in 1996
- IAB Europe started to publish its Pan-European AdEx study in 2006
- IAB Serbia joined in 2012

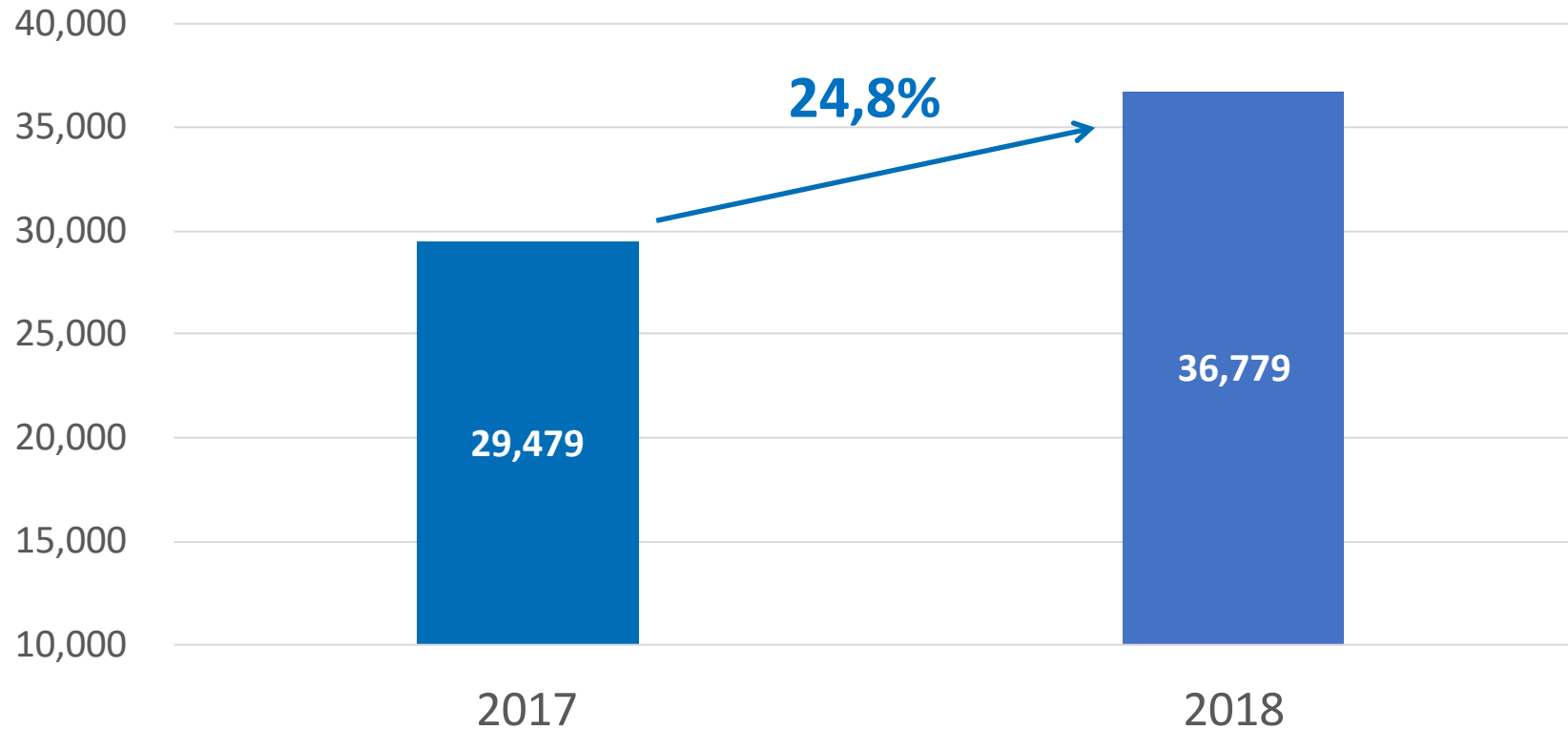
# METHODOLOGY

- IAB Europe introduced a new methodology in 2015
- The study analyzes the gross digital ad spend
- Mobile ad spend is a sub-segment while Display and Search include mobile (not affecting the total).
- This study is a result of research, calculation and estimation of IAB Serbia expert team

**Market ad spend in 2018:**  
**€ 36,8 million**

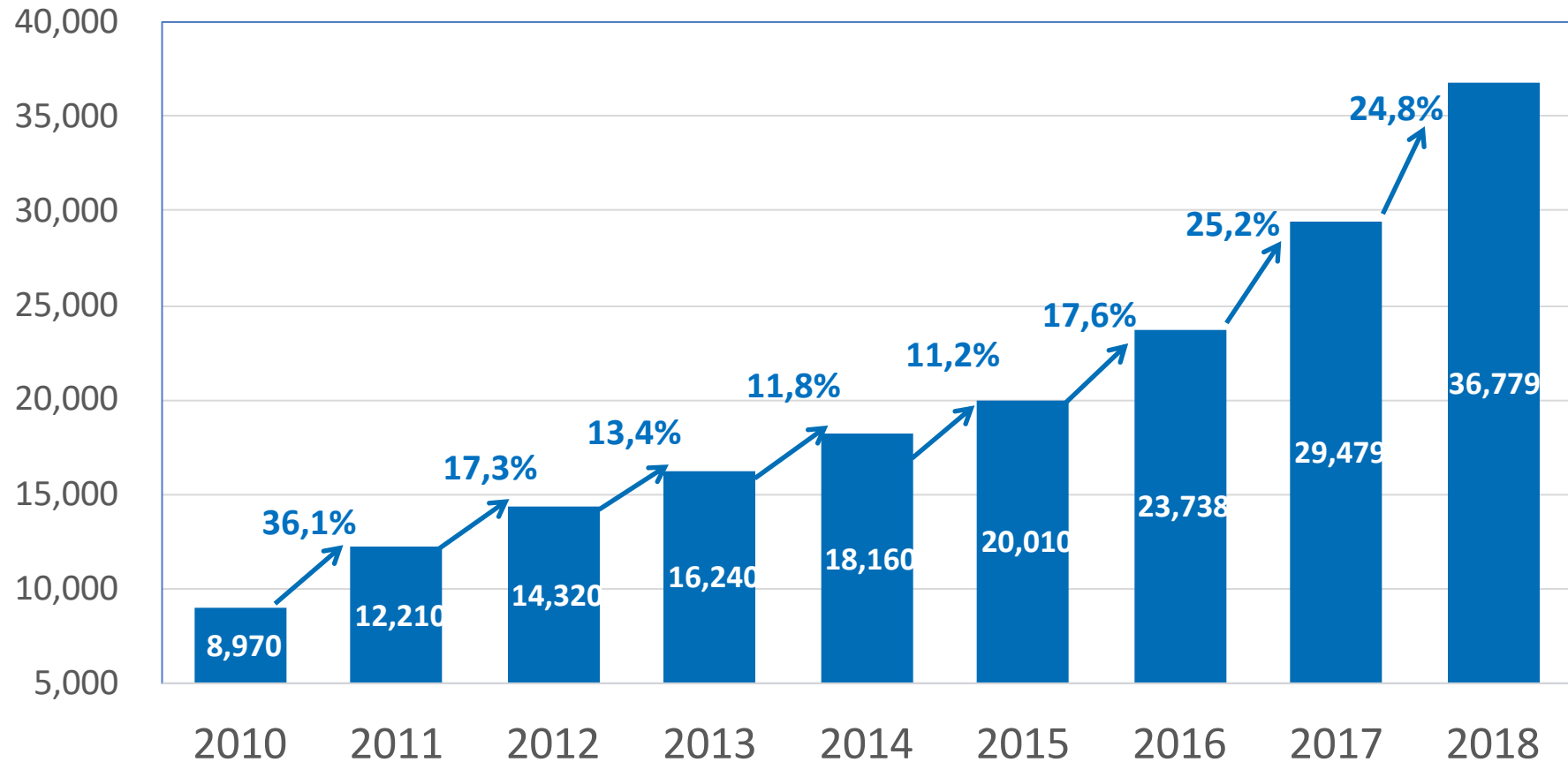
# Digital Advertising Market Growth

Total YoY market growth 2017 - 2018 ('000 €)



# Digital Advertising Market Growth

Total YoY market growth 2010 - 2018 ('000 €)





## Key Segments

**DISPLAY**

**AD**



**PAID SEARCH**



**CLASSIFIEDS  
AND  
DIRECTORIES**





# Market Value

## by Key Segments in 2018

**DISPLAY**

**AD**



**€ 25,86 mil**  
**+22%**

**PAID-FOR  
SEARCH**



**€ 5,3 mil**  
**+26%**

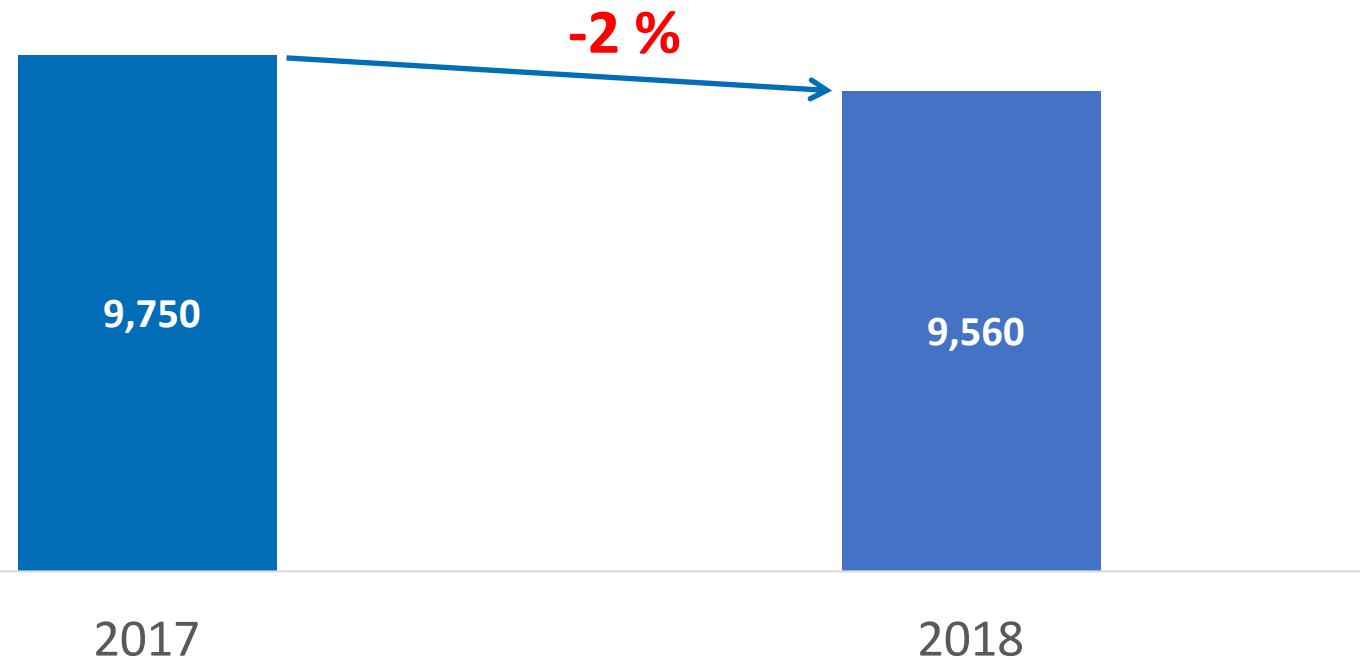
**CLASSIFIEDS  
AND  
DIRECTORIES**



**€ 3,9 mil**  
**+20%**

# LOCAL DISPLAY MARKET VALUE

Total YoY market 2017 - 2018 ('000 €)

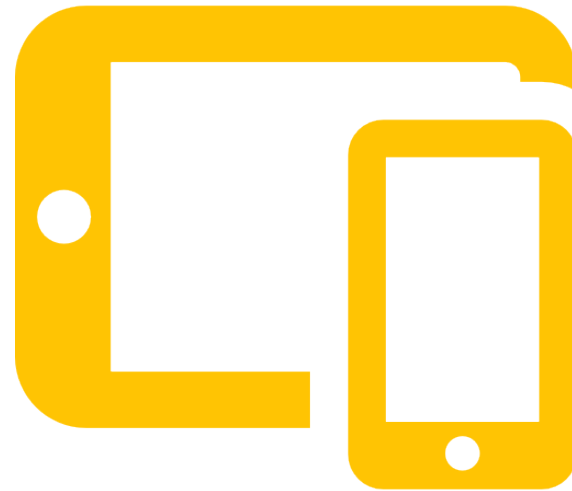


# MOBILE ADVERTISING

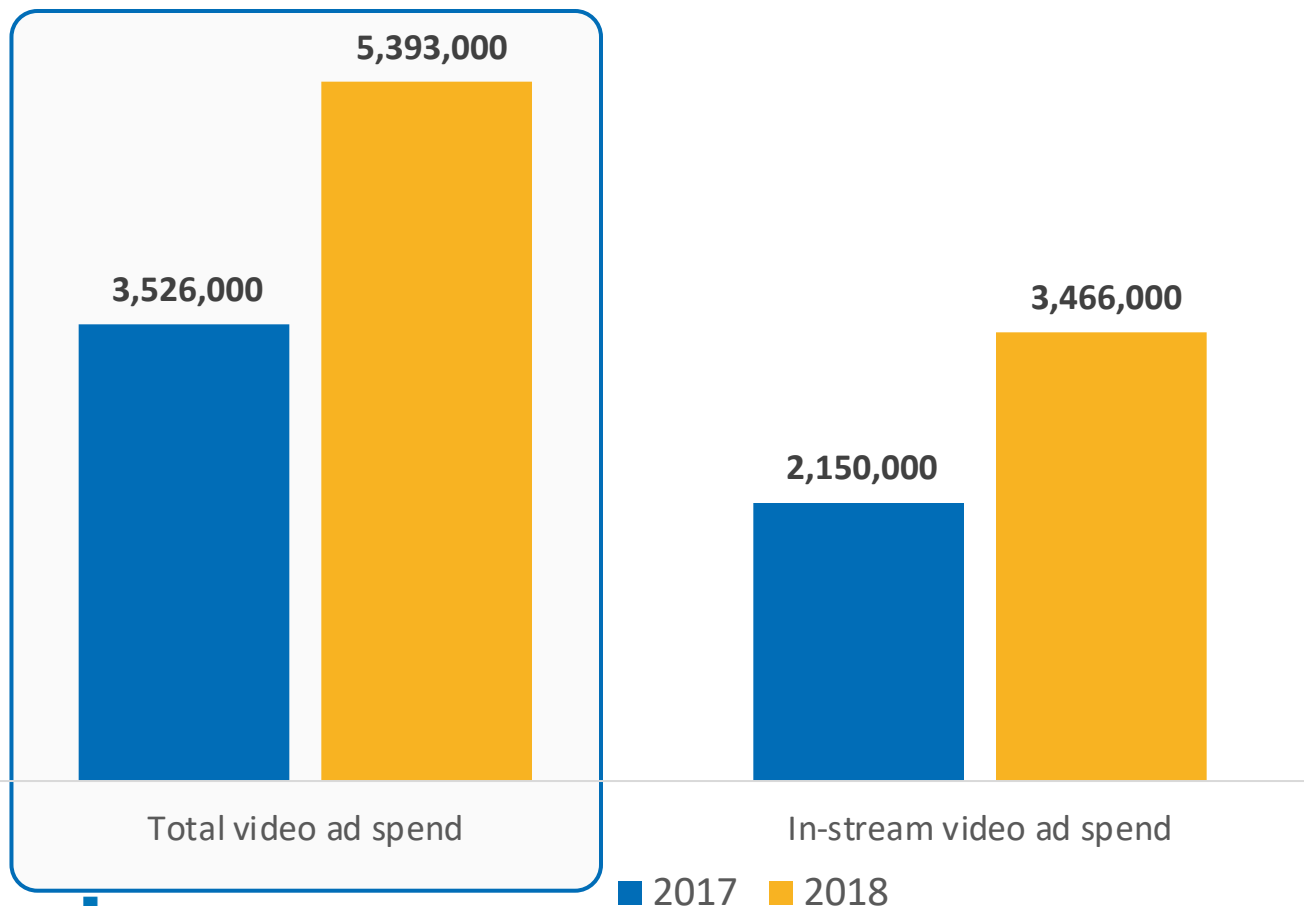
Estimated mobile ad spend in  
2018:

**€ 18,91 mil**

**+45,4%**



# ONLINE VIDEO ADVERTISING

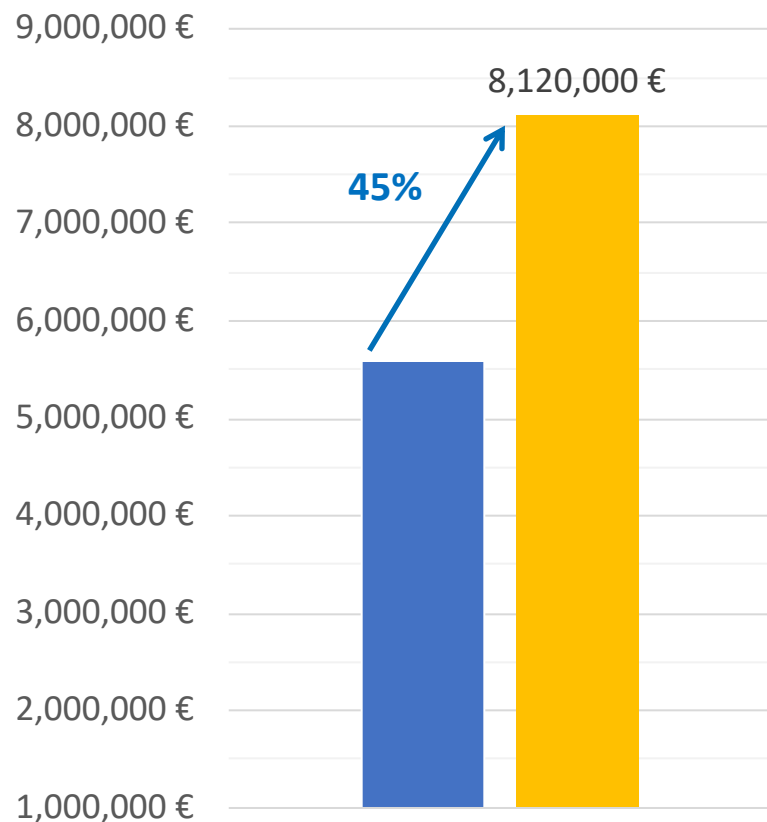


Estimated online video market  
value in 2018:

**€ 5,39 mil**

**+53%**

# SOCIAL MEDIA MARKETING



Estimated social media marketing investment

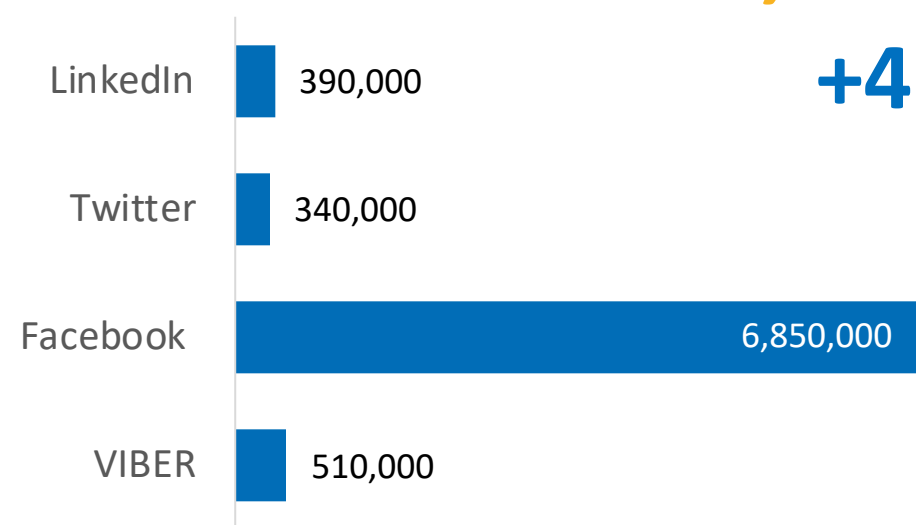
■ 2017 ■ 2018

adex

Estimated social media marketing value in 2018:

€ 8,1 mil

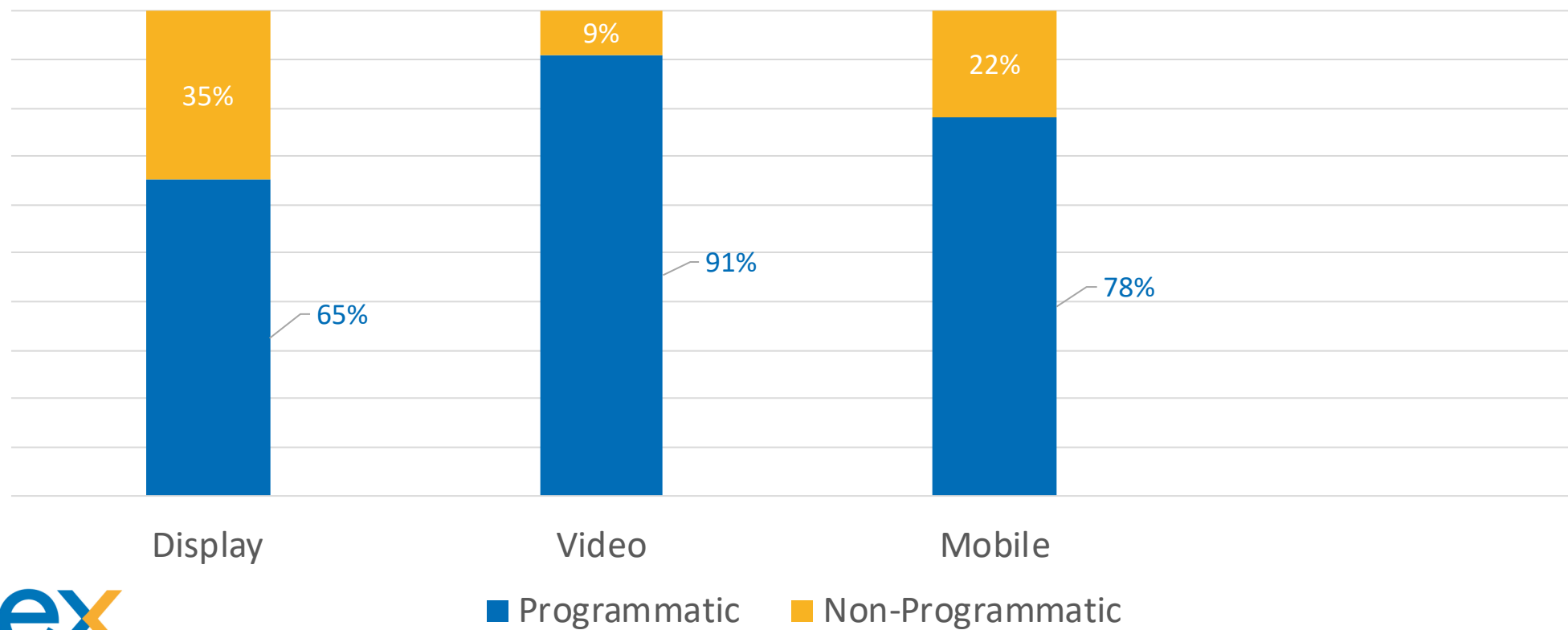
+42%



■ 2018

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# PROGRAMMATIC AD SPEND



# KEY TAKEAWAYS:

- Digital market value € 36,8M in 2018
- Strong 24,8% growth
- VIDEO has the highest investment growth (53%), followed by MOBILE (45,4%) and SOCIAL advertising (45%)
- SOCIAL and LOCAL DISPLAY hold the largest share of digital market investment (48% combined)



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