

DIGITAL AD SPEND STUDY FOR 2019

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IAB ADEX DIGITAL AD SPEND STUDY

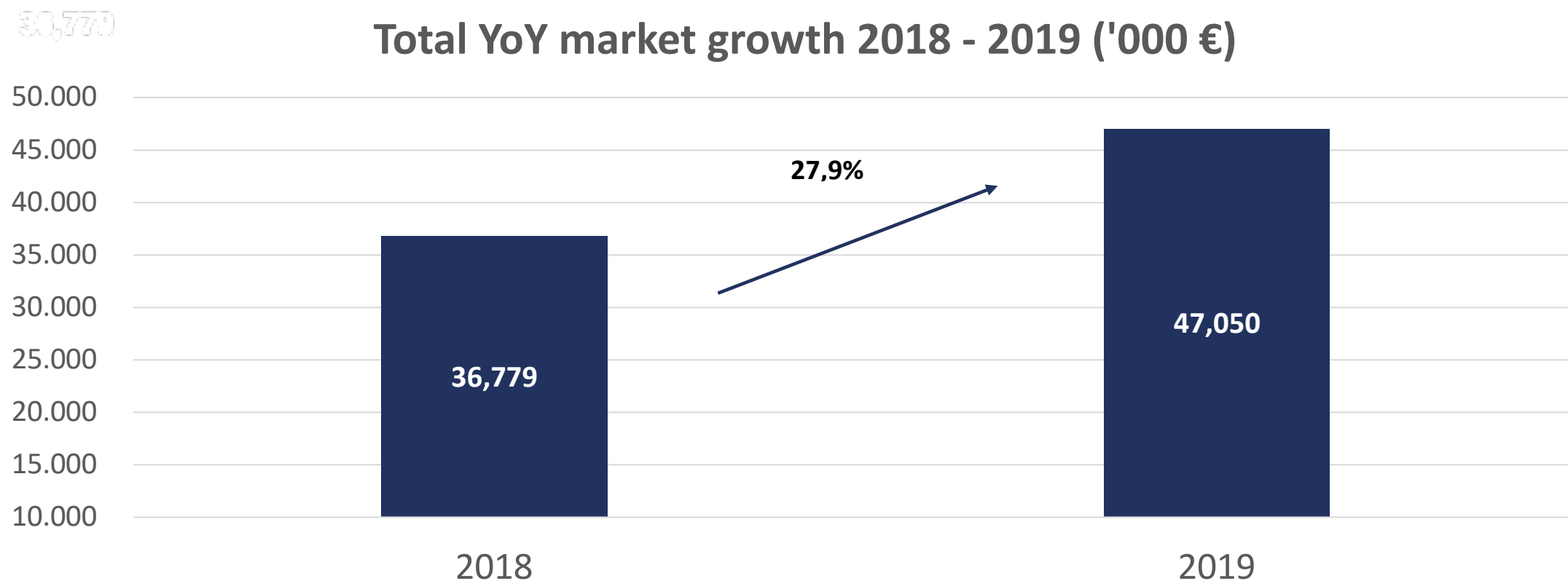
- IAB (Interactive Advertising Bureau) AdEx reports are the industry benchmark numbers worldwide
- The first AdEx report was published for the US market in 1996
- IAB Europe started to publish its Pan-European AdEx study in 2006
- IAB Serbia joined in 2012

METHODOLOGY

- IAB Europe introduced a new methodology in 2015
- The study analyzes the estimated net 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 consisting of key industry players

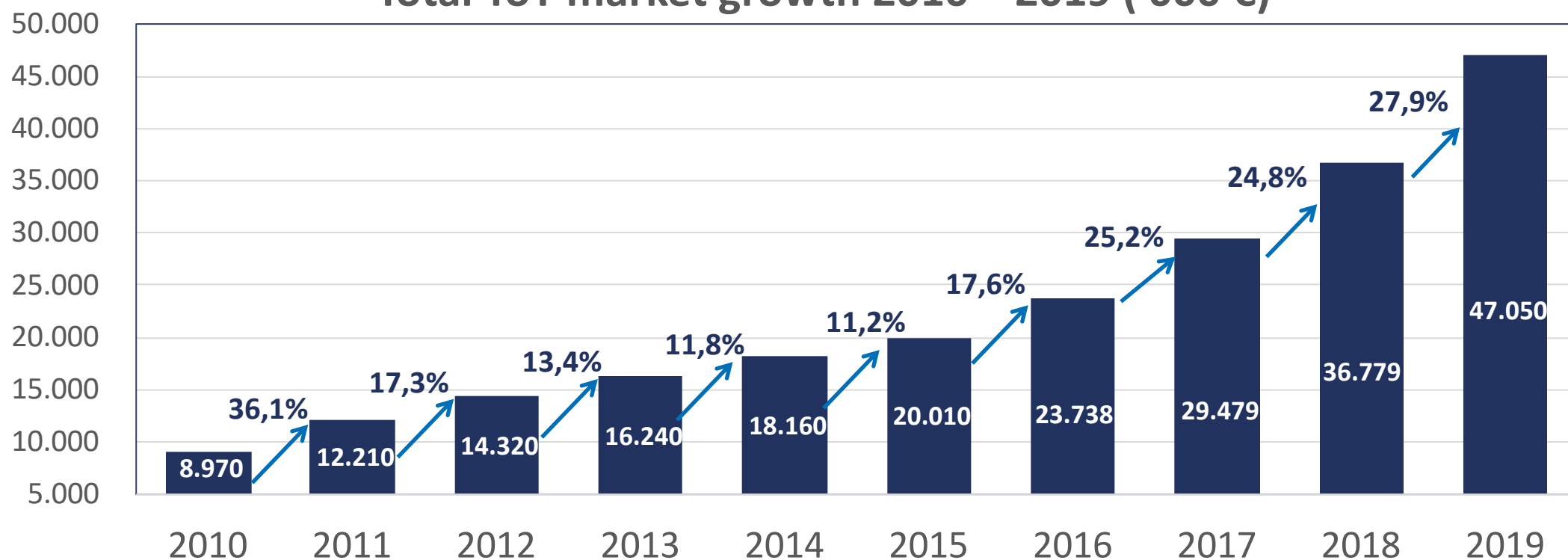
Market ad spend in 2019:
€ 47,05 million

Digital Advertising Market Growth



Digital Advertising Market Growth

Total YoY market growth 2010 – 2019 ('000 €)



KEY SEGMENTS



DISPLAY



PAID SEARCH



**CLASSIFIEDS
AND
DIRECTORIES**



Market Value by Key Segments in 2019

DISPLAY



€ 31,75 mil
+22,8%

PAID-FOR SEARCH



€ 6,7 mil
+26,4%

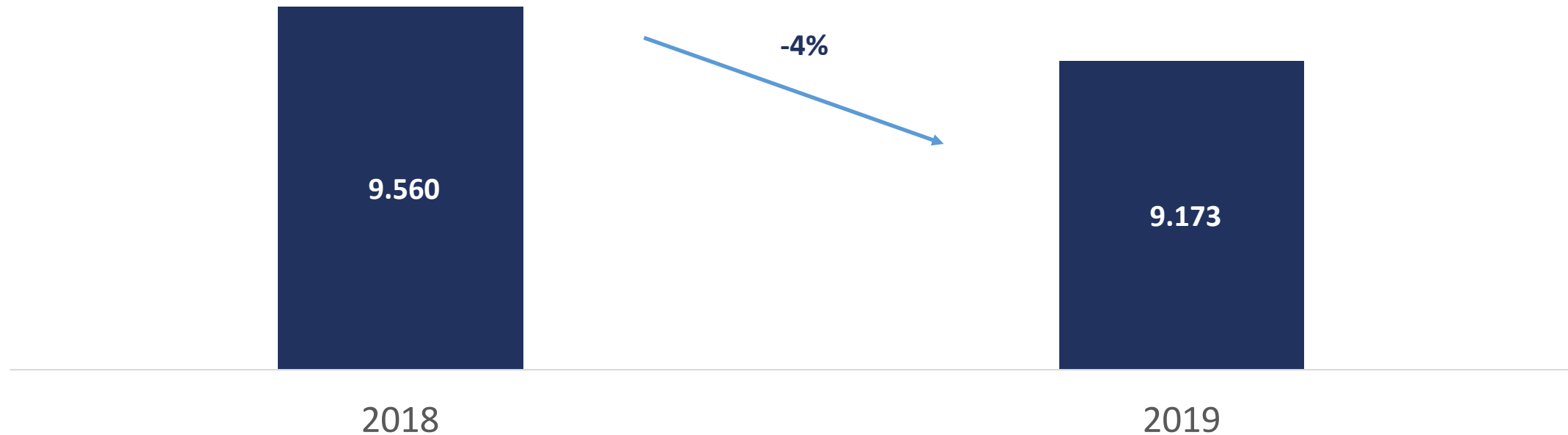
CLASSIFIEDS AND DIRECTORIES



€ 6,2 mil
+71,2%

LOCAL DISPLAY MARKET VALUE

Total YoY market 2018 - 2019 ('000 €)



MOBILE ADVERTISING

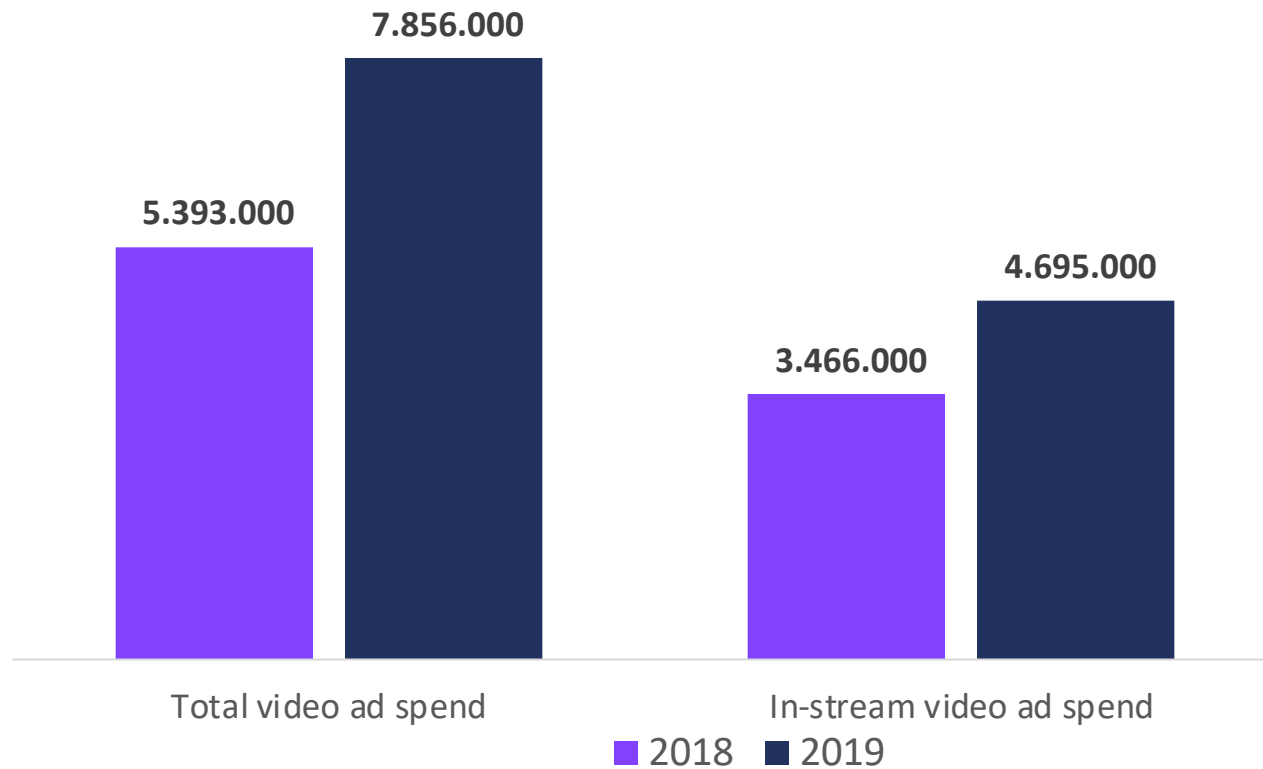
- Estimated mobile ad spend in 2019:

€ 30,32 mil

+60%



ONLINE VIDEO ADVERTISING



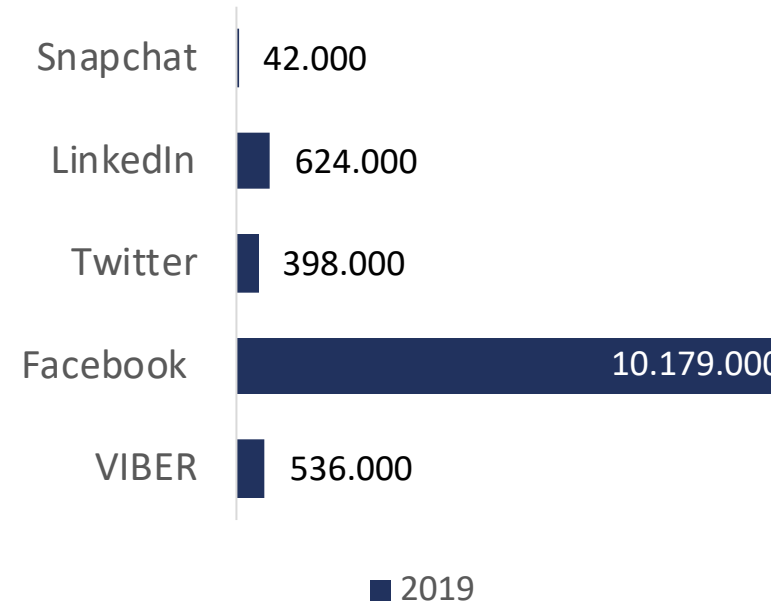
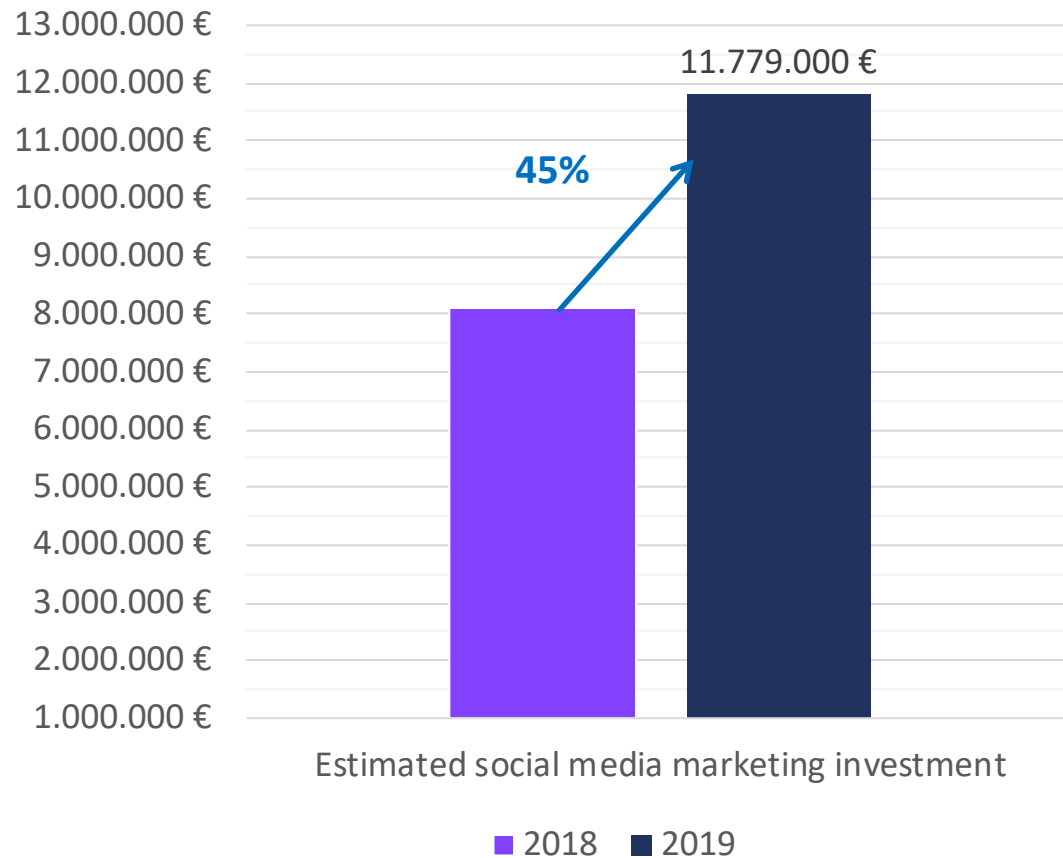
Estimated online video market
value in 2019:

€ 7,86 mil
+45,67%

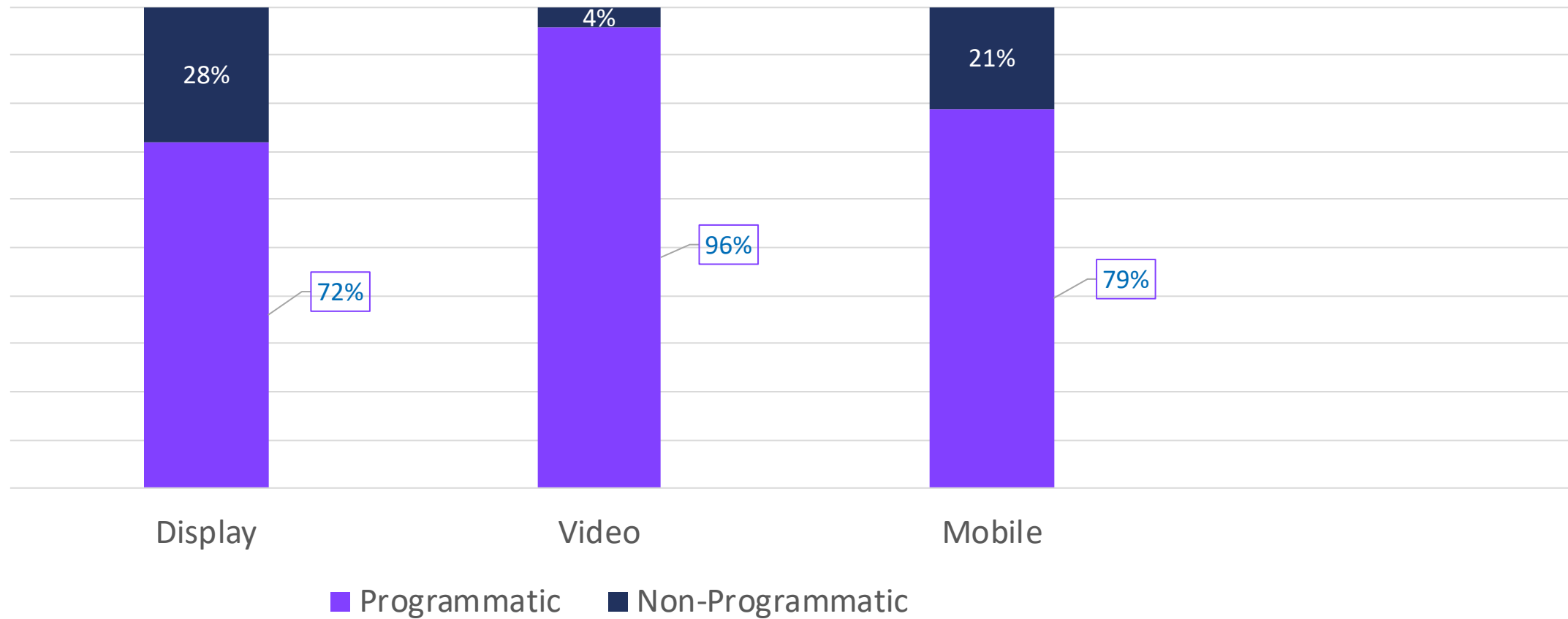
SOCIAL MEDIA MARKETING

Estimated social media marketing
value in 2018:

€ 11,79 mil
+45%



PROGRAMMATIC AD SPEND



KEY TAKEAWAYS:

- Digital market value € 47,05M in 2019
- Strong growth of 27,9%
- MOBILE has the highest investment growth (60%), followed by VIDEO (45,67%) and SOCIAL advertising (45%)
- *SOCIAL and LOCAL DISPLAY hold the largest share of digital market investment (44.55% combined)*
- Classifieds and Directories hold the largest sector increase (up by 71,2%)



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For more info contact contact@iab.rs