adex
Benchmark 2016

ADEX BENCHMARK 2016

European Online Advertising Spend

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iab europe

IHS Markit™

CONTENTS

INTRODUCTION

IAB Europe's 2016 AdEx Benchmark report reveals that European online advertising continues to deliver double-digit growth and has surpassed €40 billion in total revenue. Having overtaken TV ad spend for the first time in 2015, online advertising now leads TV by over €7 billion.

The AdEx Benchmark report is produced in collaboration with IHS Markit and is the definitive guide to the state of the European online advertising market. The report details facts, figures and trends across Europe's rich and diverse markets and benefits from IHS Markit's analysis and observations from our members. In the eleven years of this IAB Europe study online ad spend has seen a net addition of €35.3 billion.

Twenty seven markets participated in the study, and all recorded positive growth. A total of twenty markets grew double-digit for the third year running and three markets recorded a growth of more than 30%. Whilst the most advanced markets continue strong growth, the growth is mostly led by the smaller CEE markets, for example, Romania and Slovenia. This demonstrates yet again the ongoing importance of digital advertising as a driver for growth across European economies of varied characteristics.

Digital continues to drive the overall advertising industry and in 2016 offset the €1.2 billion losses of traditional media and established a new total advertising market high for the first time since the 2009 recession.

> Digital strengthened its position as the primary advertising medium in 2016 - indeed, our data demonstrate emphatically the scale of the contribution made by digital advertising to the European economy and highlight the role of innovation to deliver growth in this fast moving industry. A key priority for IAB Europe is ensuring that stakeholders understand the implications of the General Data Protection Regulation for their businesses while, at the same time, we continue to work with members and stakeholders to reinforce the quality advertising environment for brands and deliver a valued consumer experience built on transparency and trust. Please reach out to our expert team to find out more about the implications for your business and how you can become a member of IAB Europe to support this critical work..
>
> **Constantine Kamaras,** Chairman, IAB Europe Board of Directors

In terms of the three categories covered in the report, display advertising growth outperformed other categories for the third year in a row with a rate of 14.1% and a value of €16 billion. Paid-for-search continues to be the largest online advertising category in terms of revenue with a growth of 12.9% and a market value of €19.1 billion.

The report highlights that mobile and video are key areas of growth for our industry as advertisers aim to meet their audience's changing media consumption habits. Both mobile display and mobile search grew by 50%+ in 2016. Video continues to experience strong growth gaining a share of 18.5% of the total display market.

As an industry body we strive to work with our members to adopt standards which underpin a quality advertising environ-

INTRODUCTION

ment, help to develop advertiser confidence in new opportunities and at the same time provide transparency and choice to users about how personal data are processed. IAB Europe is also deeply invested in engaging with policy makers on the regulatory framework governing online advertising, notably in the area of data protection.

It is a critical time for the online advertising industry as companies and data protection enforcement authorities work to understand and interpret the implications of the General Data Protection Regulation. IAB Europe and the network of national IABs are playing a key role in contributing to this interpretative exercise. The AdEx Benchmark study reinforces the importance of advertising to the digital industry and we look forward to discussing and debating its findings with industry, regulatory and civil society stakeholders to continue to support growth and innovation.

ABOUT THIS REPORT

The IAB Europe AdEx Benchmark report provides a comprehensive perspective on online advertising spend across 27 European markets.

This is the eleventh edition of the report. In addition to most recent market data, it also provides a historical perspective and documents significant shifts and developments in the European online advertising market over time.

Portraying a coherent picture of online advertising markets is complex. Online advertising in Europe has developed largely within national ecosystems that have their own traditions, cultures, standards, and ways of doing business. Although there is a growing harmonisation across Europe, this diversity still means that each market measures online advertising spend slightly differently. Differences occur on several levels: the rate of spend (e.g. ratecard, gross, net), formats included, companies covered, or all these factors combined.

This report is a response to these challenges and requirements. Since its inception in 2006, the number of participating markets has doubled, recognising the importance of this task.

A unified view of European online advertising spend is growing ever important in light of European policy, attracting global start-up funding, benchmarking market developments, the increasingly pan-regional nature of digital advertising investments and the role of Europe's digital economy in a global context.

The basis for the AdEx Benchmark report is the annual industry benchmarking studies conducted by each national Interactive Advertising Bureau (IAB) in Europe. These national studies represent the income of thousands of websites, portals, apps and online advertising businesses, and data is compiled directly by national IABs based on information supplied by companies selling advertising online in each market.

The AdEx Benchmark report conducts a meta-analysis of these studies. It aggregates the data and makes the adjustments necessary to enable the data to be comparable. In order to provide a full like-for-like picture, the report draws on secondary data and modelling by IHS in order to fill coverage gaps to ensure the online advertising market is captured in its entirety. Full details of this adjustment process for each marketare provided in Appendices iii and iv. In order to provide the reader with a basic frame of reference, key definitions are outlined below.

The data in this report are stated on the basis of actual gross income. Gross income is the amount of actual spend invoiced by the publisher including any agency commission, but after discounts from rate card. To avoid any double-counting, production costs and pan-regional ad spend are taken out of the figures.

At a top level, the report provides the following segmentation of online advertising formats:

- Display
- Paid-for-search
- Classifieds and directories

Additional segmentations are:

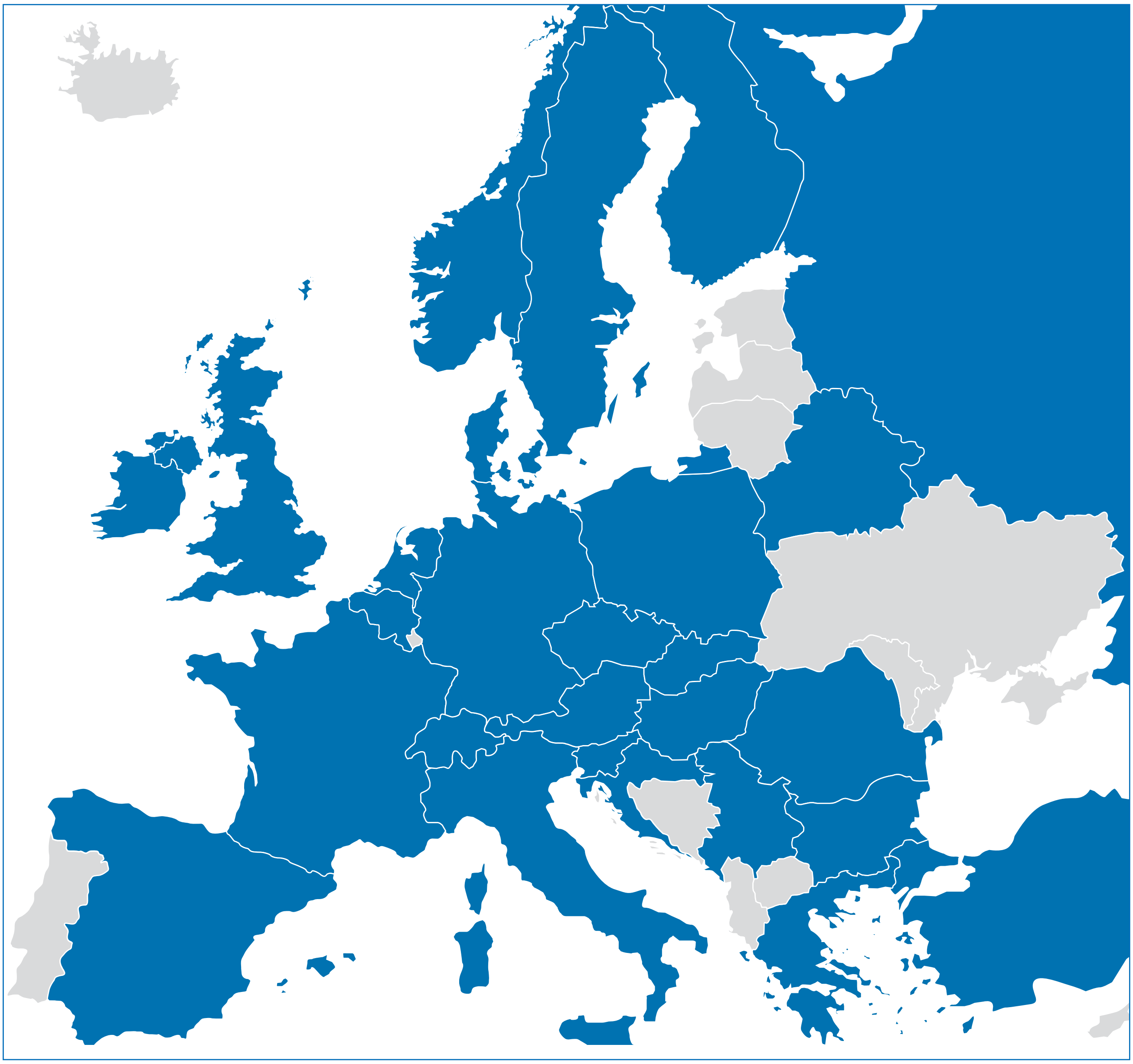
- Video
- Mobile (display and search)

The report treats video and mobile display as subsets of display, and mobile search as a subset of search. These additional segmentations are only split out for those markets that reported them. However, the associated values are included in the top level data for all markets, ensuring like-for-like comparability of top level market sizes.

Underlying the format segmentation is highly granular local data which the report harmonises into internationally comparable formats.

IHS Markit does not audit the information or the data from the national IABs and provides no opinion or other form of assurance with respect to the information. Only aggregate results are published and individual company information is held in strict confidence by the audit partners of national IAB studies.

ABOUT THIS REPORT



- Austria
- Belarus
- Belgium
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- Croatia
- Czech Republic
- Denmark
- Finland
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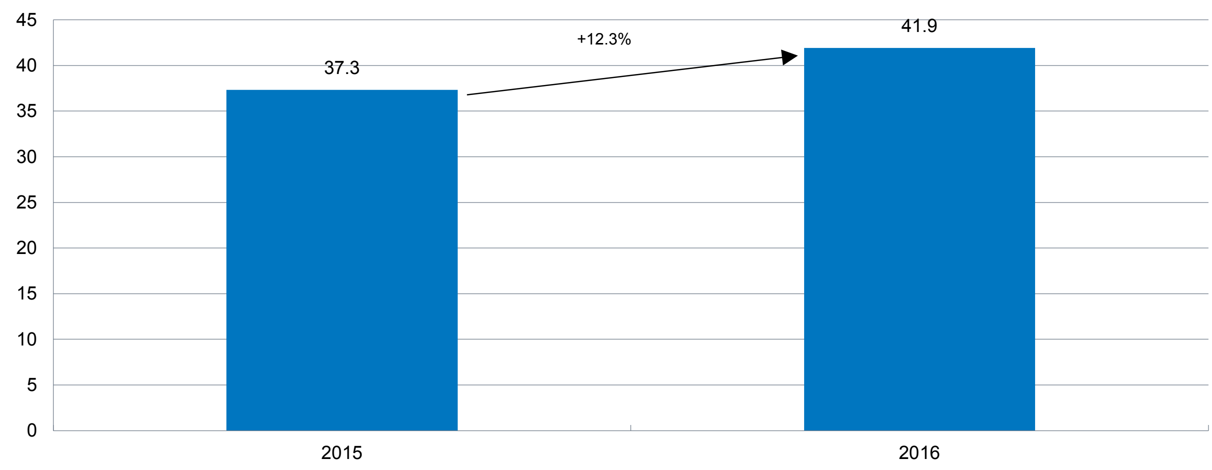
- Netherlands
- Norway
- Poland
- Romania
- Russia
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- UK

EXECUTIVE SUMMARY

Gross online advertising expenditure in Europe totalled **€41.9 billion in 2016,** up 12.3% on a like-for-like basis from €37.3 billion in 2015.

Total online advertising spend (€bn)



Source: IAB Europe and IHS Markit

Display continued to outperform other formats and saw a growth rate of 14.1%, driven by high growth in video, reached €16.2 billion.

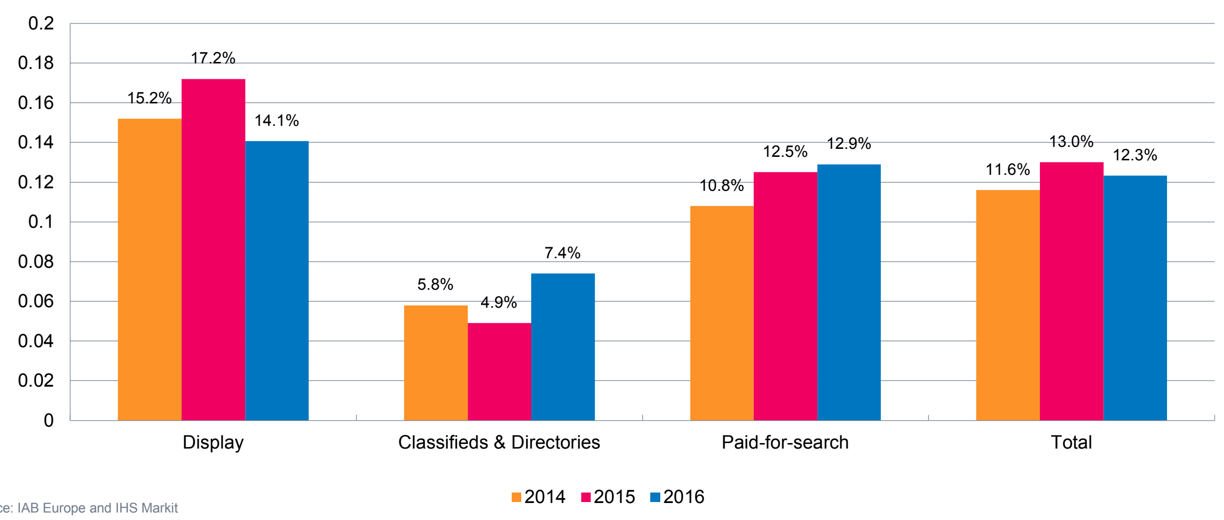
Paid-for-search remains the biggest online format and registered growth rate of 12.9% and a market value of €19.1 billion.

Classifieds and directories market expanded 7.4% to €6.5 billion.

**All growth rates used in this report are on a like-for-like basis to ensure historical comparability. This means that manually calculating growth rates from the published market values is not always possible.*

EXECUTIVE SUMMARY

Online advertising formats: year-on-year growth (%)



Source: IAB Europe and IHS Markit

Mobile display advertising grew by 52.9% to €5.4 billion and now accounts for 33.3% of the display market. 14 markets reported **mobile search** in 2016, amounting to €5.5 billion, up 52.9% from 2016. Mobile was the key growth engine of European online ad spend across formats in 2016.

The top ten markets in terms of online ad spend in 2016 were:

1. UK – €14.2bn
2. Germany – €5.9bn
3. France – €4.2bn
4. Russia – €2.6bn
5. Italy – €2.3bn
6. Netherlands – €1.7bn
7. Spain – €1.6bn
8. Sweden – €1.6bn
9. Belgium – €0.9bn
10. Switzerland – €0.8bn

Top 3 Individual growth markets were:

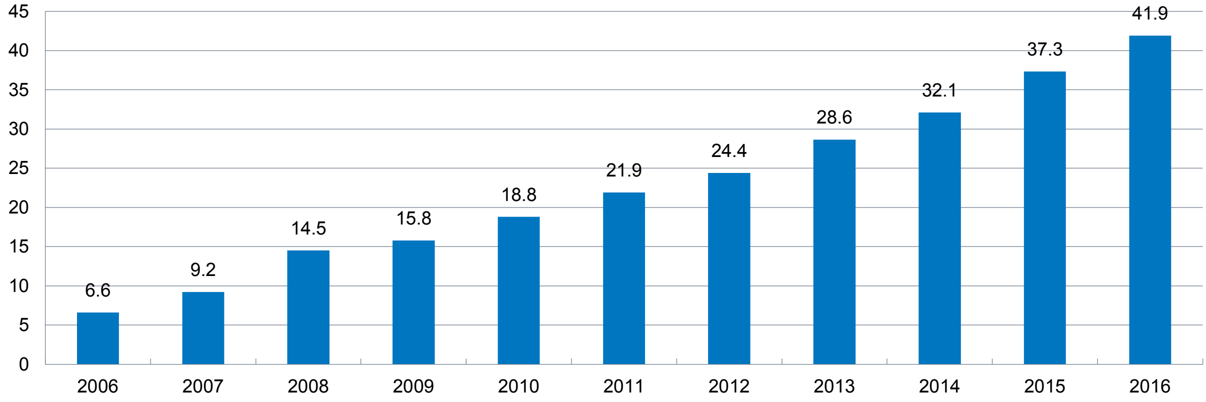
1. Romania 36.9% growth
2. Slovenia 32.2% growth
3. Ireland 31.4% growth

GROWTH IN HISTORICAL CONTEXT

Online advertising growth over time

Between the first edition of the IAB Europe AdEx Benchmark report in 2006 and 2016, the European online advertising market has grown from €6.6 billion to €41.9 billion, adding €35.3 billion in market size. For comparison, this value that exceeds the entirety of the €33.4 billion TV advertising market in 2016.

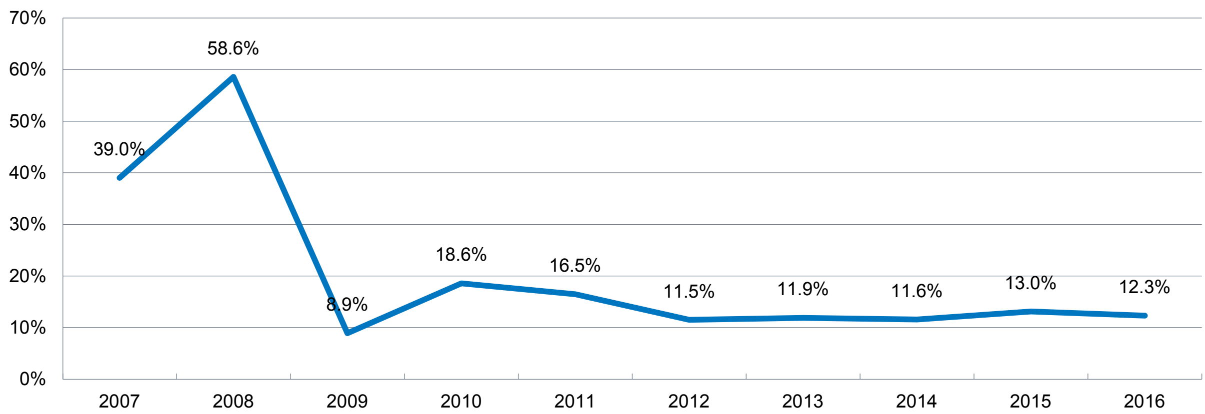
Total online advertising spend (€bn)



Source: IAB Europe for 2011-2016; 2006-2011 retropolated based on IHS growth rates

The growth trajectory in 2016 was in line with the increases of previous years as European online advertising growth showed no signs of slowing down despite growing market maturity. After a slowdown due to the economic recession in 2009 and a two-year period of market rebound, since 2012 European online advertising growth rates have been homogenous, ranging between 11.5% and 13.0%. This represents a maximum variance in growth rates of 1.6 percentage points.

Online advertising year-on-year growth (%)



Source: IAB Europe and IHS Markit

GROWTH IN HISTORICAL CONTEXT

The following timeline traces the development of online advertising from a €6.6 billion to a €41.9 billion market in Europe.

2006: the value of the European online advertising market stood at €6.6 billion, €30 billion less than the TV advertising market.

2007: growth mainly came from France, Germany and the UK, then early-adopters, and now mature markets that are the three largest overall advertising markets in Europe.

2008: the European online advertising market grew by 58.6%, helped by emerging markets, first and foremost Poland and Slovenia.

2009: the recession of 2009 also demonstrated that online advertising was more resilient against economic volatility than all other media.

2010: display led the rebound with a growth of 21.3% with new spend from brand advertisers, especially in the fast-moving consumer goods (FMCG) sector.

2011: online advertising spend maintained strong growth in 2011, increasing by 16.5% year-on-year.

2012: many European economies suffered both GDP and advertising spend declines, but online advertising experienced double-digit growth for the third year in a row at 11.5%.

2013: for the first time, mobile accounted for a double-digit proportion of total display ad spend at 11.8%.

2014: all 27 participating countries in the IAB Europe AdEx Benchmark increased their online ad spend from Romania at 2.3% to Slovenia at 43.1%.

2015: online overtook TV to become the largest advertising medium in Europe.

2016: online advertising surpassed €40 billion milestone, compensating for declines or slower growth in other media to drive a historical all-media advertising market high in Europe of €112.4 billion.

> Online advertising in Europe was a €42 billion industry in 2016. It is great to see spend continuing to grow at a healthy rate, due largely to innovations in Mobile, Video and automation. Mobile now commands one-third (33.3%) of total online ad spend and Video is a €3 billion market. Advertising automation is what can truly drive increased spend in the marketplace, reducing transactional friction between buyers and sellers, plus increasing efficiency and efficacy for campaigns at scale.
>
> **James Brown,** MD EMEA, Rubicon Project

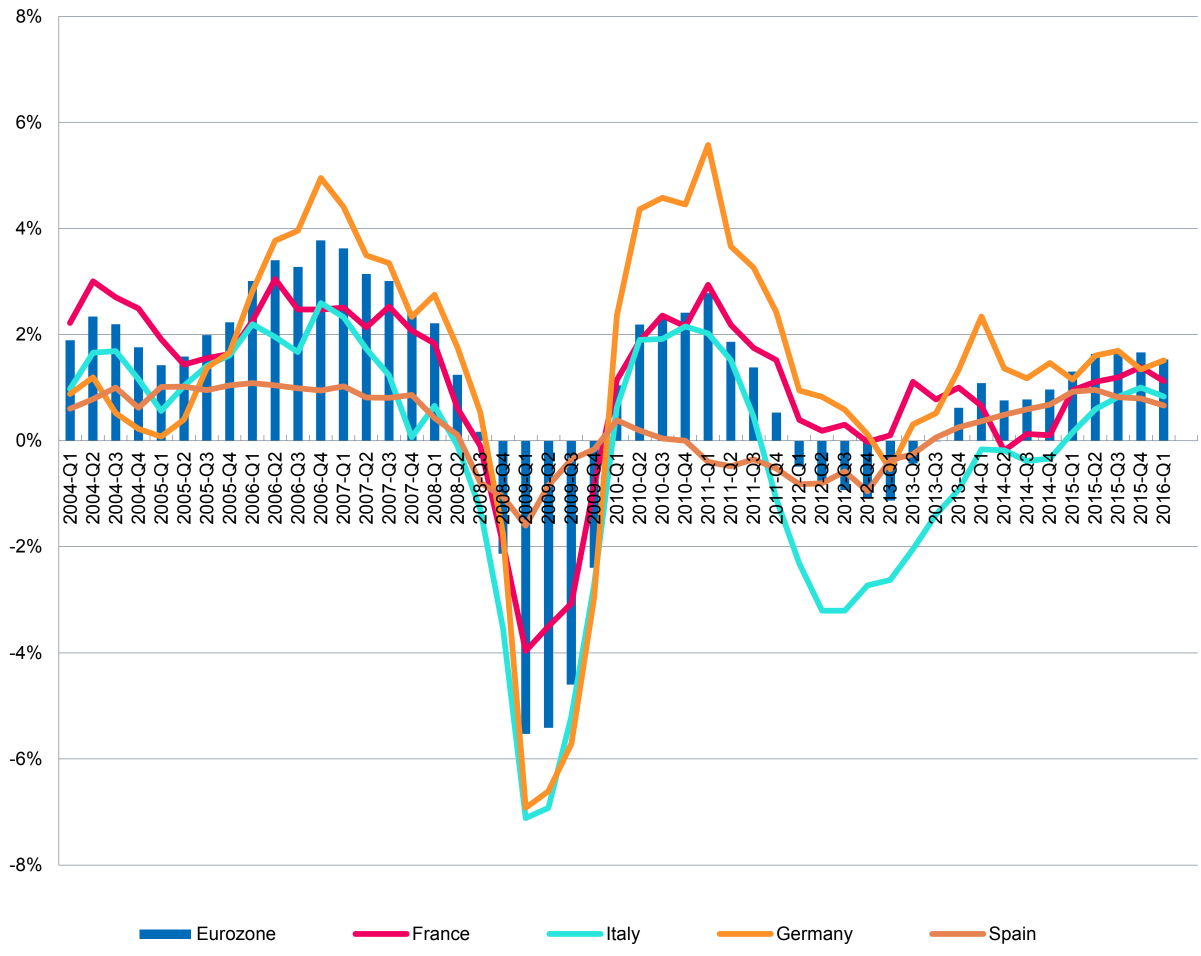
> The data from IAB Europe's AdEx Benchmark aligns with the changes we've been seeing in the consumption of digital media, in particular the growth of mobile and video. It highlights the importance for advertisers to shift from siloed marketing and measurement methods to methods that work in a cross-everything world. The shift to mobile and video will continue apace in 2017, and for brands looking to engage audiences through these channels they need to know their advertising is helping them to achieve their business objectives.
>
> **Tony Evans,** EMEA Marketing Science Director, Facebook

GROWTH IN HISTORICAL CONTEXT

Online advertising in a macroeconomic context

The advertising industry is closely correlated to the health of the overall economy. Household consumption, industrial production and GDP are all metrics that affect advertising spend. After a double-dip recession in 2009 and 2012, GDP levels in the Eurozone started to recover and both 2015 and 2016 exhibited accelerated growth. Despite political uncertainty across the region and a busy political calendar in many major EU countries, the region as a whole is slowly recovering.

GDP growth in Eurozone (%)



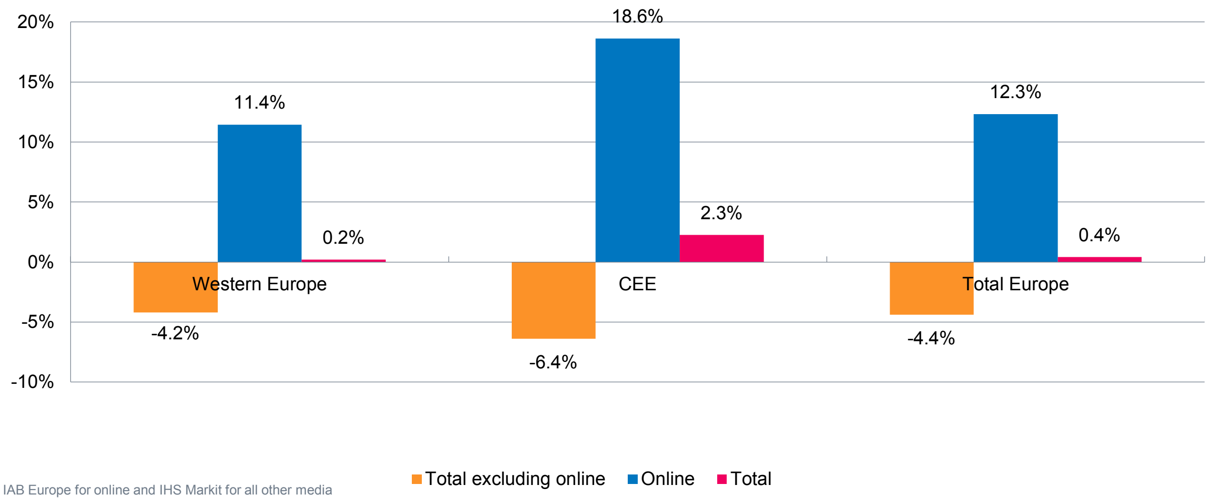
Source: IHS

Outside the Eurozone, as the Russian market embraced the new normal of sanctions, the CEE's biggest market recovered in 2016, and the region as a whole was the bright spot for European online advertising market.

GROWTH IN HISTORICAL CONTEXT

Economic forces are cyclical forces, as demonstrated by the contraction of the advertising market in a recession and its growth as economic conditions improve. Yet advertising markets are in parallel exposed to structural transformations in light of changing media consumption habits. Traditional media continued to experience revenue contraction or low growth in 2016, with TV remaining flat. This means that only online advertising could benefit fully from the favourable macro-environment.

2016: advertising year-on-year growth (%)



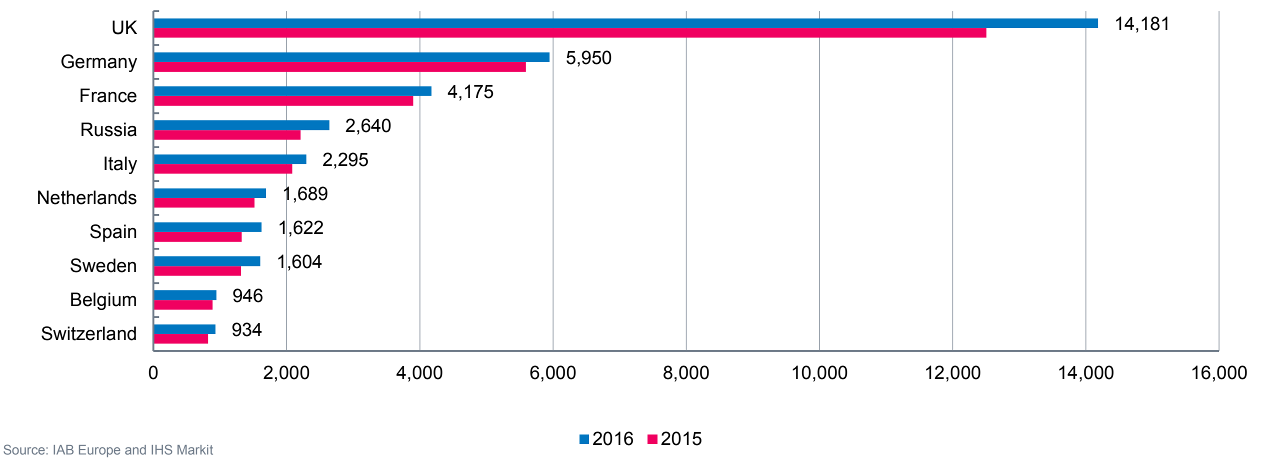
Source: IAB Europe for online and IHS Markit for all other media

EUROPEAN MARKETS IN PERSPECTIVE

Volume: the UK is now as big as the next three markets (Germany, France, and Russia)

- The UK, Germany, and France were the **three largest online advertising markets** in 2016, at €14.2 billion, €6.0 billion, and €4.2 billion, and **accounted for 58% of the European ad market**. The share of the top 5, top 7, and top 10 markets within the 27 market total of this study continued to decline, but the top 5 still claims a lion share of the European online ad market.
- Russia recovered from a slow growth and surpassed Italy and Netherlands to be the fourth largest European online ad market in 2016.
- Belgium made it to the top ten and replaced Denmark at number 9 in the top 10.

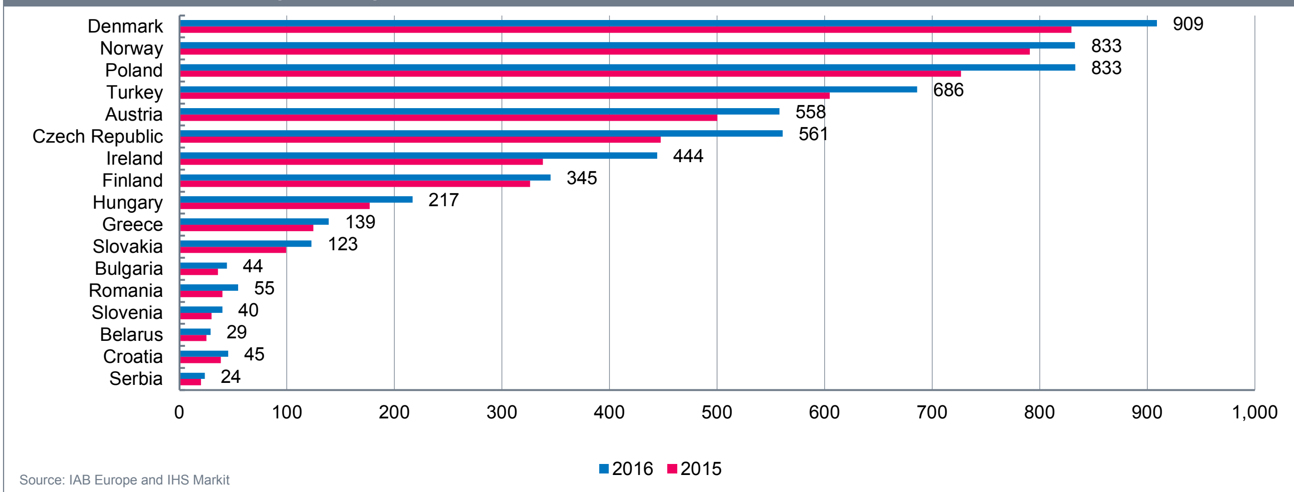
Top 10: total by country in 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

- Big CEE markets such as Poland and Czech Republic are slowly moving up the rank as economic conditions improve, broadband penetration and mobile penetration grow.
- CEE markets have a second mover advantage and can draw on standards and best practices developed in early mover markets to close the development gap.

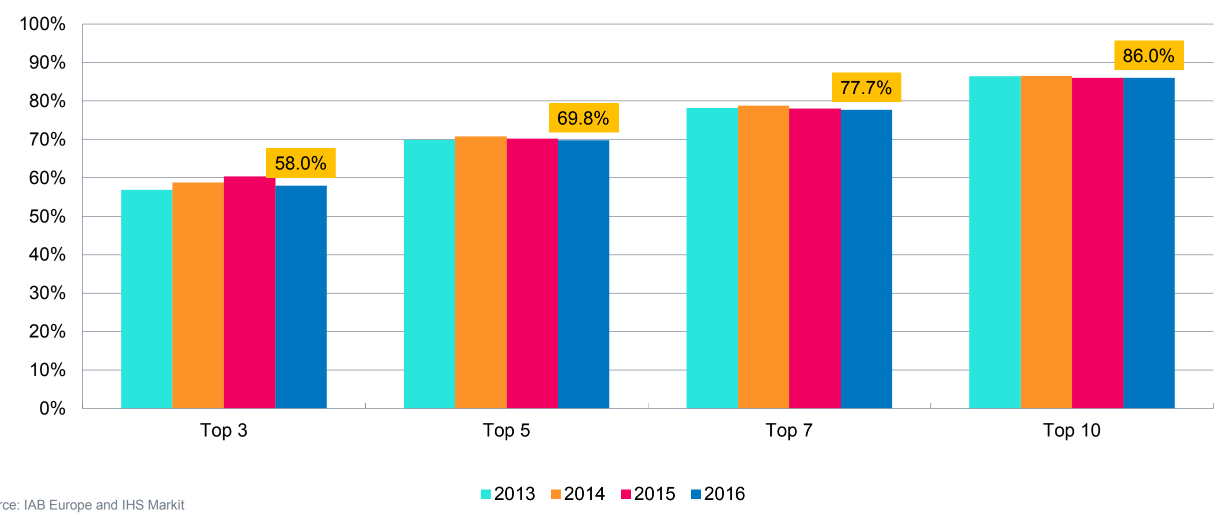
Rest of Europe: total by country in 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

EUROPEAN MARKETS IN PERSPECTIVE

Share of European online ad spend by market (%)



Source: IAB Europe and IHS Markit

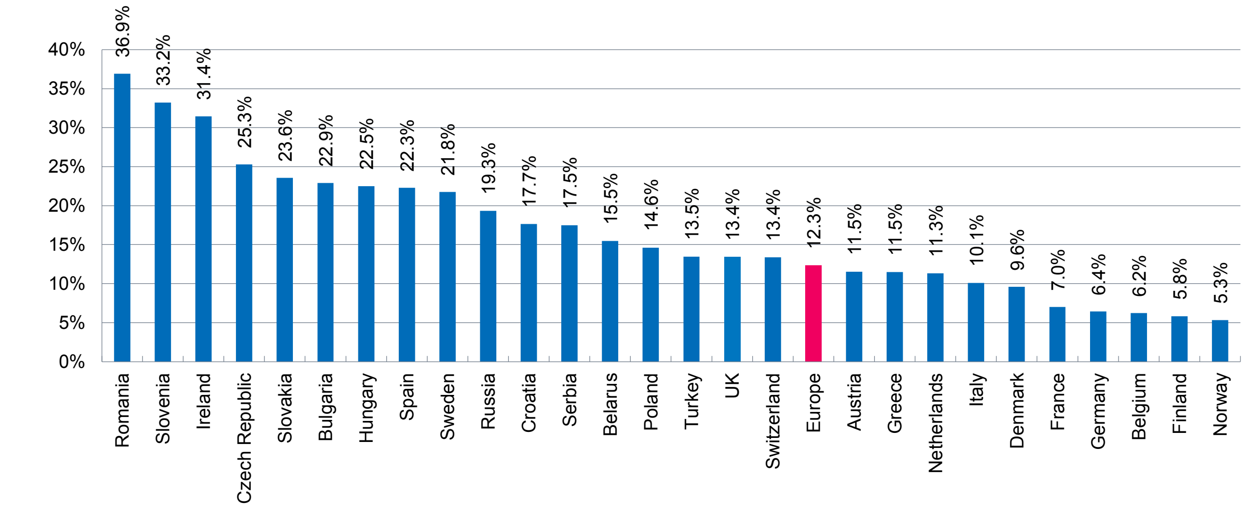
- Market share dominated by the top three markets declined in 2016, demonstrating the gradual increase of market value of the other smaller markets, but the top 10 still commands 86% of the market share over the last three years.

EUROPEAN MARKETS IN PERSPECTIVE

Growth: all European markets recorded growth in 2016

- Online advertising growth expanded 12.3% in 2016. 21 out of 27 markets recorded double-digit growth.
- The strongest growth came from Romania, Slovenia, and Ireland, with 36.9%, 33.2%, and 31.4%.
- 12 markets from the CEE region recorded double-digit growth.

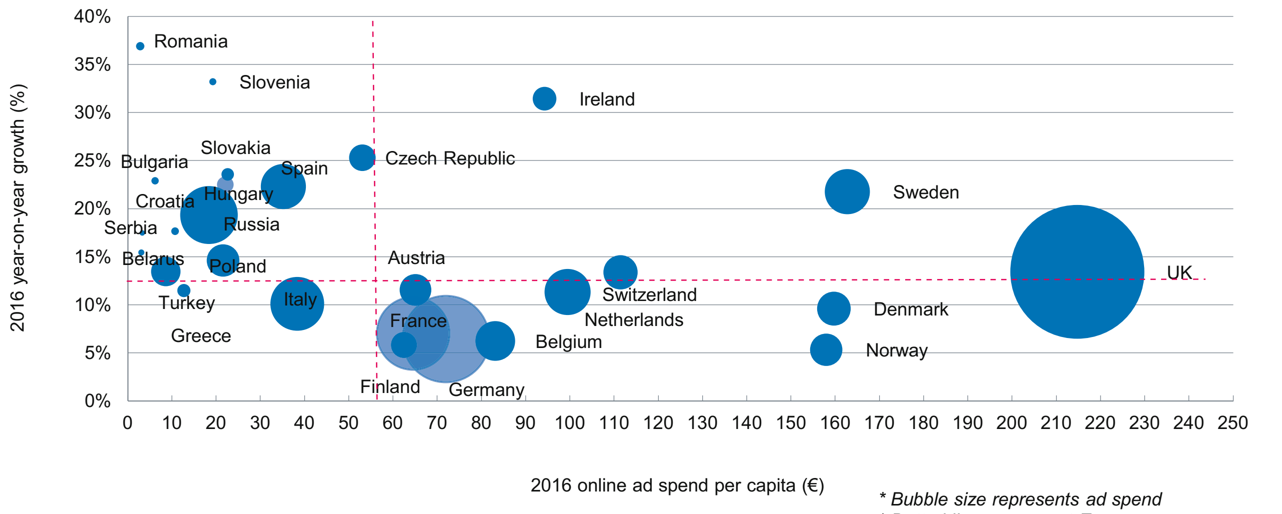
Online advertising year-on-year growth in 2016 (%)



Source: IAB Europe and IHS Markit

EUROPEAN MARKETS IN PERSPECTIVE

Markets at a glance in 2016



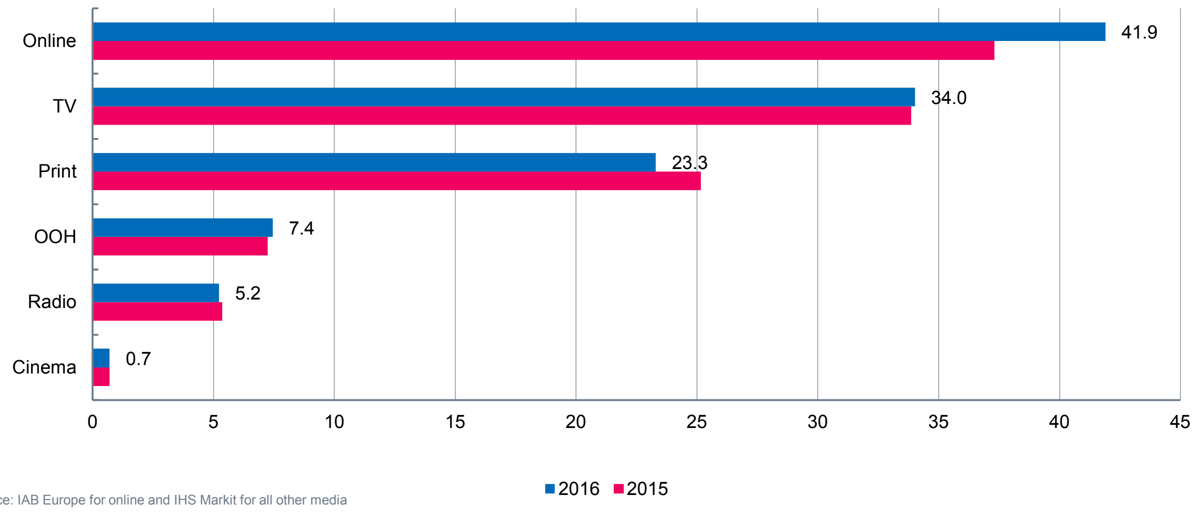
Source: IHS Markit

- The gap of the online ad per capita across the 27 European countries remains wide, ranging from a very mature market as high as €215 to less than €3 in Romania.
- But the highest growth came from the most advanced and the least mature markets.

EUROPEAN MARKETS IN PERSPECTIVE

Online and other media

Ad spend by category in Europe in 2015 and 2016 (€bn)



Source: IAB Europe for online and IHS Markit for all other media

Putting online in context with all other media (TV, print, cinema, radio, and out-of-home) provides an additional benchmark for online advertising in Europe. Below we use IHS Markit valuations that place all other media in the same rate as the IAB Europe AdEx Benchmark figures.

- Comparing with other media, it became clear that online was the only medium that has managed to have robust growth in 2016. Growth of traditional media was either flat or contracted.
- Despite high growth from individual online ad formats, they are still very far away from overtaking the TV advertising market.

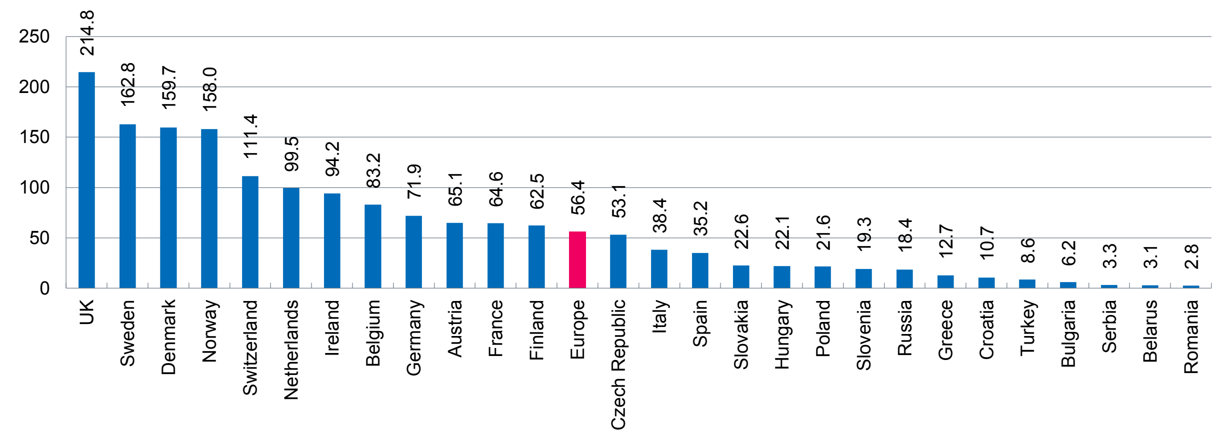
> Effective data and measurability is becoming critical to fully leverage the creative opportunities and engagement potential of digital video advertising. At RTL Group we re-defined 'TV' as 'Total Video' and focus on cross-platform video content creation, aggregation, and tech-driven monetization to reach broad audiences and provide advertisers access to a 100% brand-safe multi-screen environment.
>
> **Rhys Noelke,** Senior Vice President Strategy, RTL Group

EUROPEAN MARKETS IN PERSPECTIVE

Online ad spend per capita: €56.4 was spent per person in Europe on online advertising in 2016 with small incremental increase from 2016, but CEE markets saw double-digit growth in online ad spend per capita

Online ad spend per capita is metric that helps to evaluate the maturity and scope for development of a market. It shows how much an online consumer is worth in terms of advertising in a given market. By using IHS Markit population data, online ad spend per capita provides a normalised basis to compare and benchmark online advertising markets. It highlights the maturity of an online market irrespective of its size or absolute revenues incurred.

Online ad spend per capita in 2016 (€)



Source: IAB Europe and IHS Markit

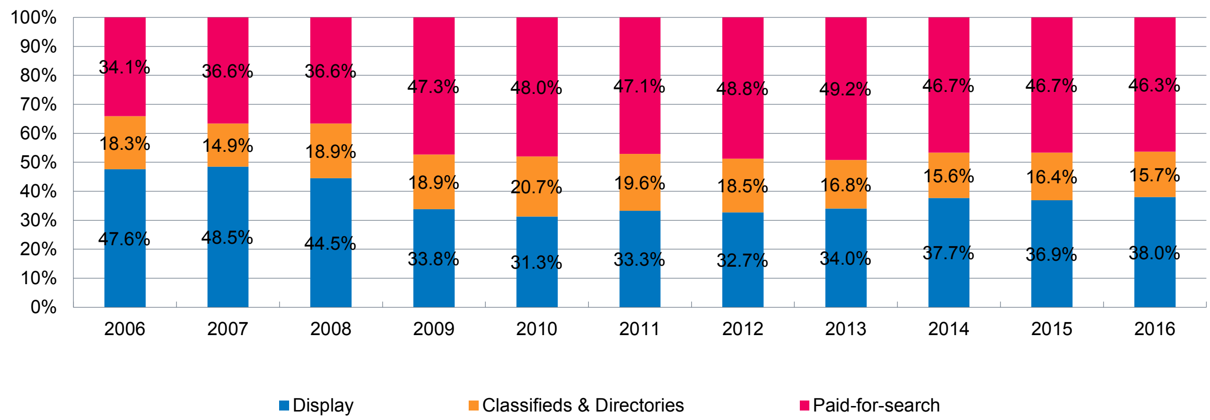
- The UK was the most mature online ad market with a record of €214.8 billion.
- Switzerland joined the Scandinavian markets (Sweden, Denmark, and Norway) €100 online ad spend per capita threshold.
- The average online ad spend per capita in Europe in 2016 was €56.4, all CEE markets fell below the European average. However, the region saw the highest increase in the value of online consumer in 2016.

SHARE OF FORMATS

Europe

- Display was the only format in 2016 to gain share, with a small increase from 36.9% to 38.0%. In order for display to see a substantial increase, the European market needs to see online video play a bigger role.
- The contraction of search share has stabilised over the last 3 years, floating around 46.0%.
- While display and search have eaten into the classifieds and directories share, it has held its share base above 15.0% over the last five years.

Format shares of online ad spend (%)



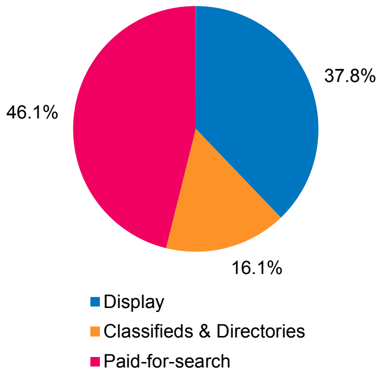
Source: IAB Europe and IHS Markit

Western Europe

- Within Western Europe, the composition of format share resembles the total European market, which was a reflection of the market values of the mature markets within the region.
- Display decreased slightly from 38.0% in 2015 to 37.8%.
- Paid-for-search remained the same year over year.
- Classifieds and directories were strong and gained a small share from display.

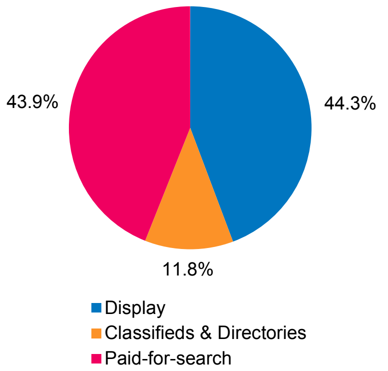
SHARE OF FORMATS

Western Europe: share of formats in 2016



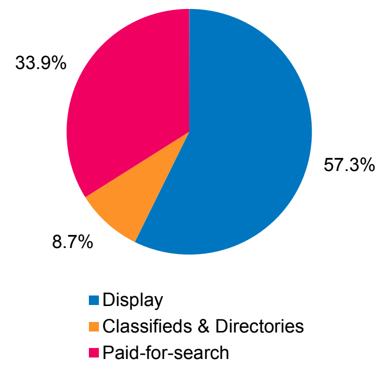
Source: IAB Europe and IHS Markit

CEE: share of formats in 2016



Source: IAB Europe and IHS Markit

CEE excluding Russia: share of formats in 2016



Source: IAB Europe and IHS Markit

Central Eastern Europe

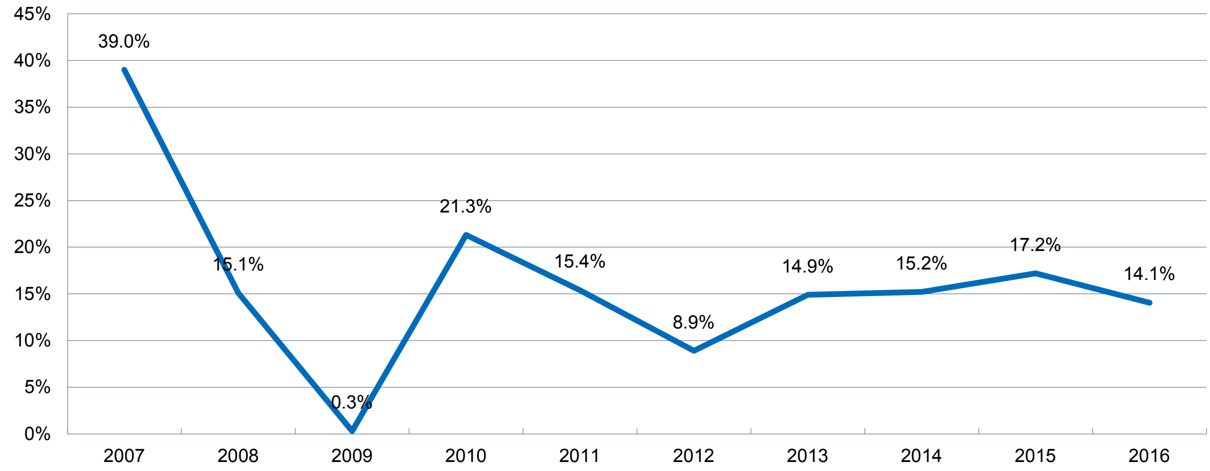
- Display and paid-for-search commanded similar market share in 2016, with 43.9% and 44.3% respectively.
- Classifieds and Directories saw a huge gain in share from 5.4% in 2015 to 11.8% in 2016, taking share from display.
- However, the story of CEE changed dramatically if Russia is excluded from the share, display would represent 57.3% of the CEE region.
- Display was the only format to gain share in the CEE-less Russia aggregates.

DISPLAY

Display experiences the fastest growth amongst all of the formats in 2016, up 14.1% from 2015

- Value: €16.2 billion
- Accounts for 38.6% of all online advertising spend
- Year-on-year growth of 14.1%
- Top five markets by value: UK, Germany, France, Italy, and Spain
- Top five markets by growth: Ireland, Slovenia, Romania, Slovakia, and Bulgaria

Display advertising year-on-year growth (%)



Source: IAB Europe and IHS Markit

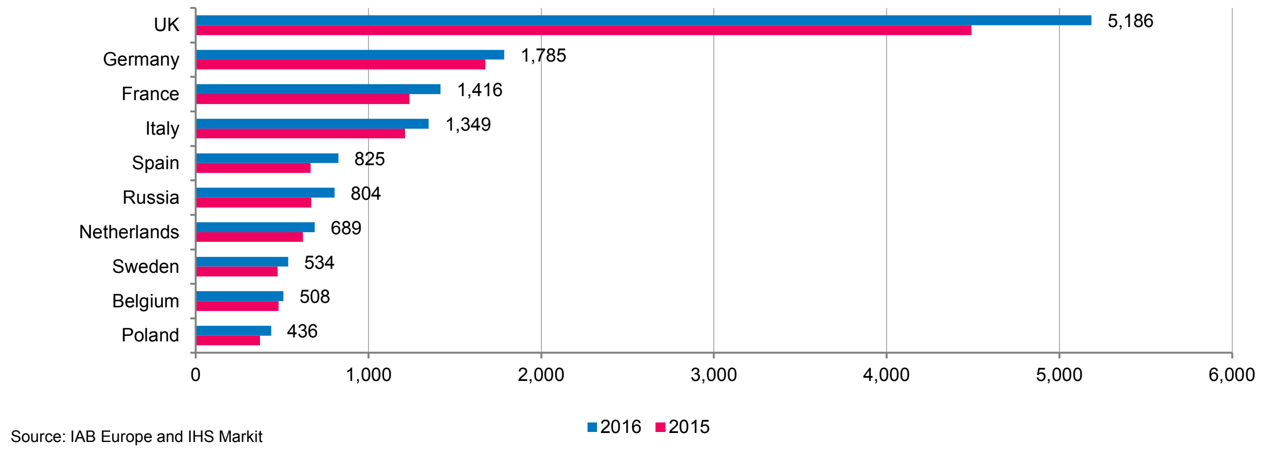
- Large differences in growth rates: ranging from 45.4% to -4.3% declines. However, 21 markets saw double-digit growth, and ten countries grew above 20%.
- Mobile and video were two growth engines behind display's high growth.

It is great to see the digital media market is still growing. Overall we believe this growth will continue in the coming period especially in markets that leverage data in a better and smarter way. By doing this it will make digital advertising more relevant, effective and overall improve the quality. All key elements that will make advertisers want to spend more in digital.

Alex Stil, President Europe, Middle East & Africa, [m]PLATFORM (GroupM)

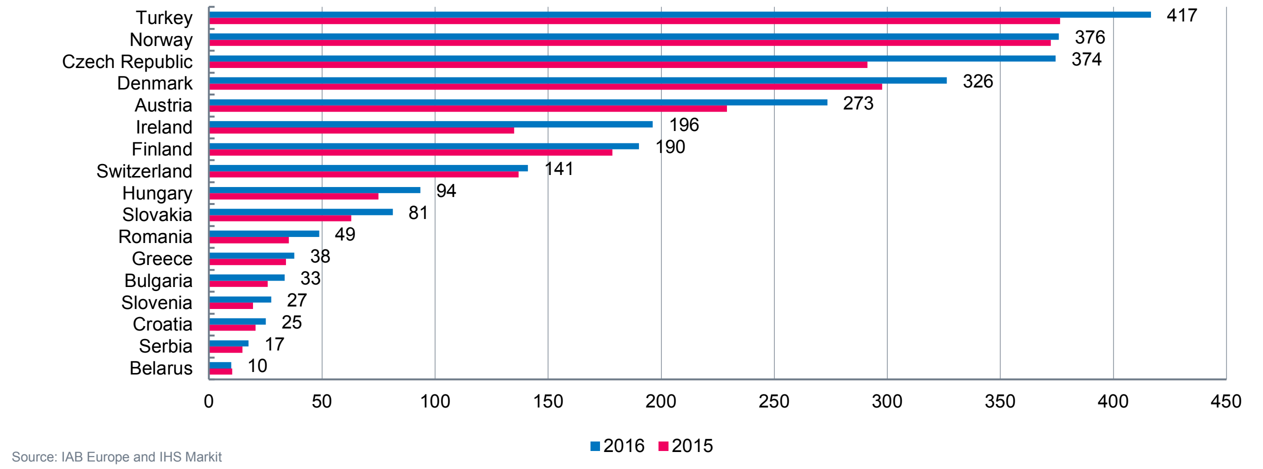
DISPLAY

Top 10: display value by country 2015 and 2016 (€m)



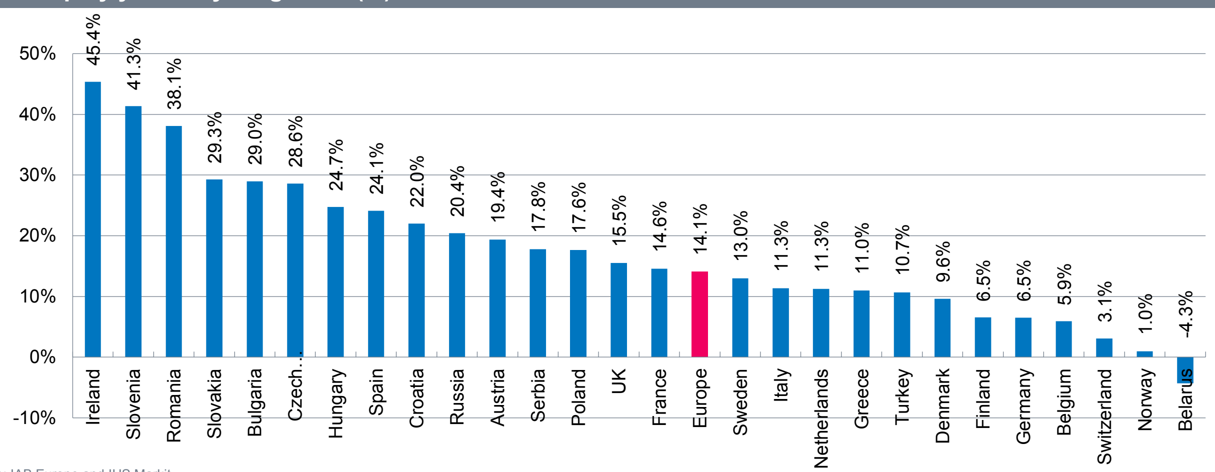
Source: IAB Europe and IHS Markit

Rest of Europe: display value by country 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

2016: display year-on-year growth (%)



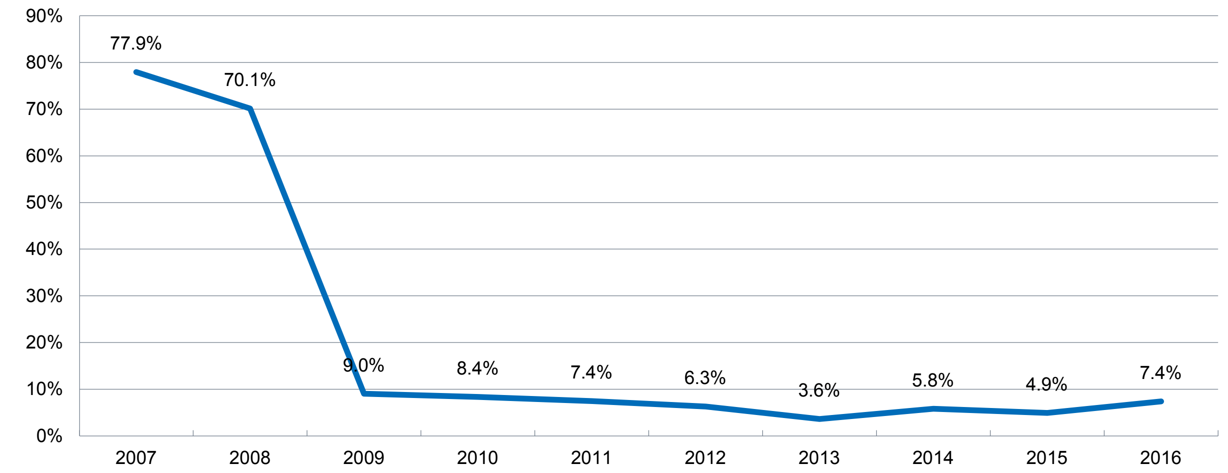
Source: IAB Europe and IHS Markit

CLASSIFIEDS & DIRECTORIES

Classifieds and directories continued to lose share to display and search, but growth slightly accelerated to high-single digit levels

- Value: €6.5 billion
- Accounts for 15.6% of all online advertising spend
- Year-on-year growth of 7.4%
- Top five markets by value: the UK, Germany, France, Russia, and Switzerland
- Top five markets by growth: Hungary, Czech Republic, Serbia, Poland, and Belarus

Classifieds & directories year-on-year growth (%)

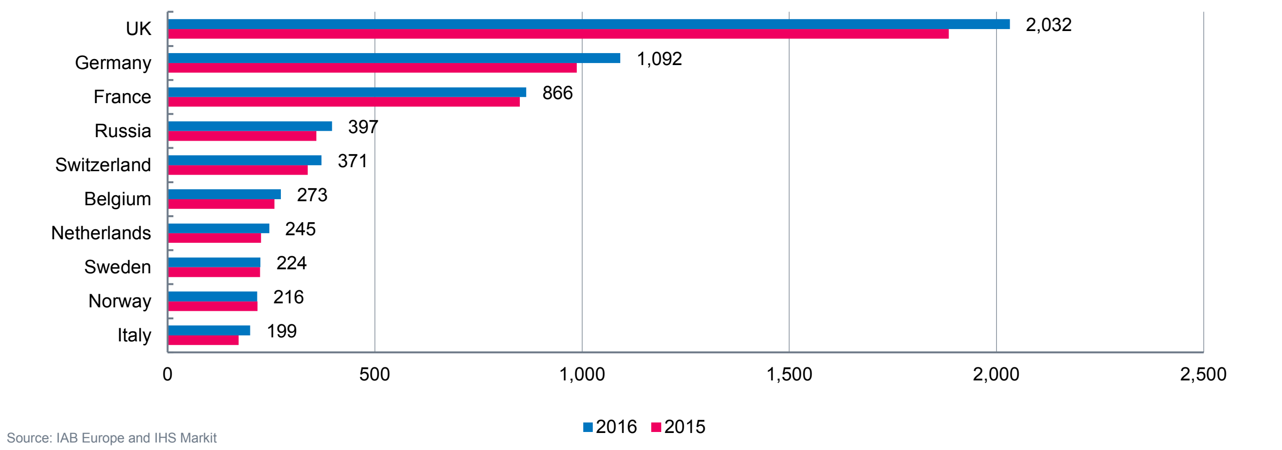


Source: IAB Europe and IHS Markit

- The consolidation of the European classifieds and directories market allowed for more centralised innovation and increased scale, acting as a market driver.
- Classified and directories sites increasingly move to programmatic banner display advertising as a funding source, which acts as a slow-down to traditional classifieds and directories formats.

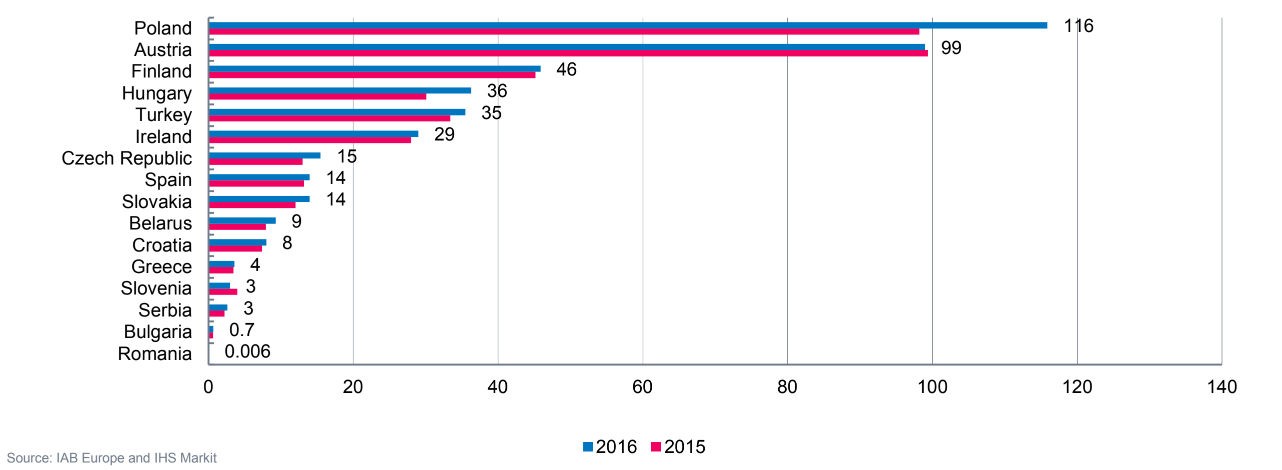
CLASSIFIEDS & DIRECTORIES

Top 10: classifieds & directories value by country 2015 and 2016 (€m)



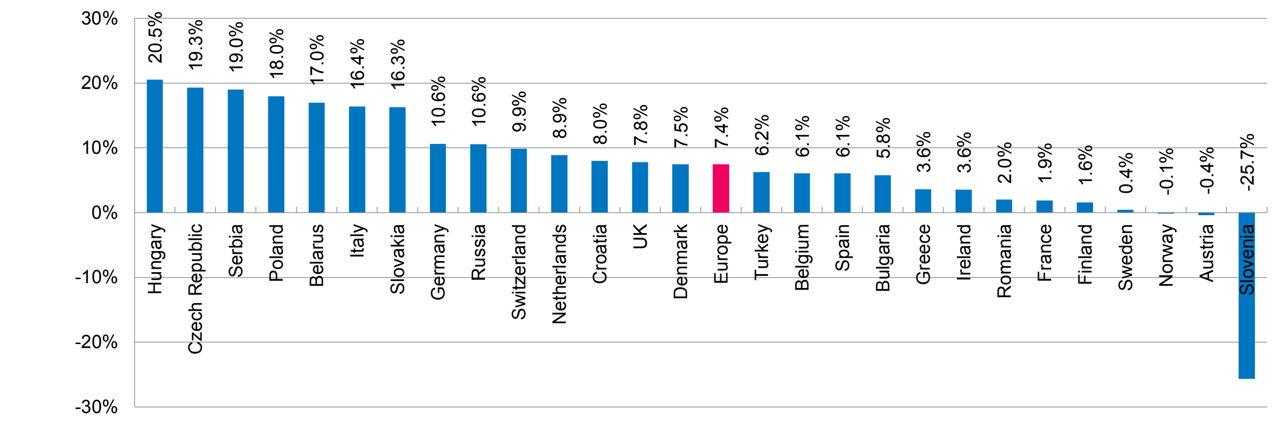
Source: IAB Europe and IHS Markit

Rest of Europe: classifieds & directories value by country 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

2016: classifieds & directories year-on-year growth (%)



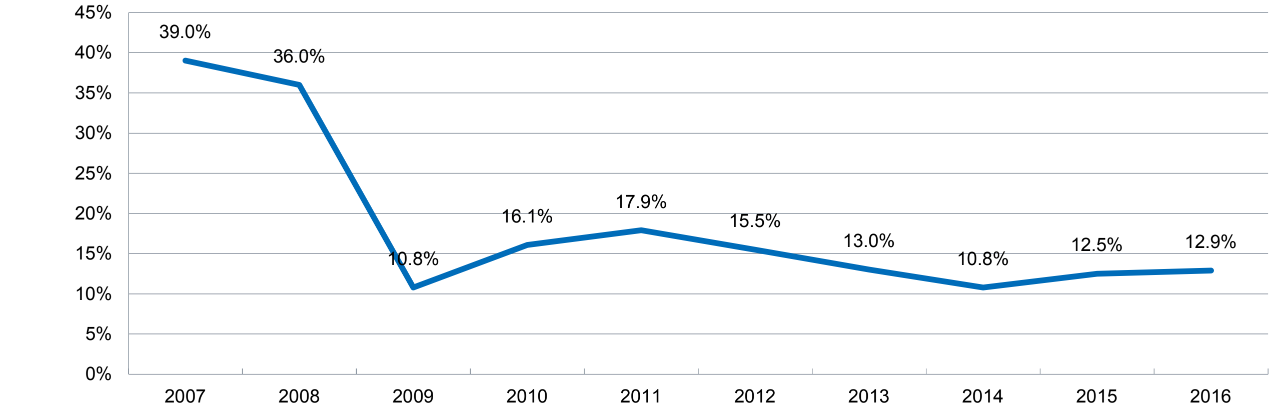
Source: IAB Europe and IHS Markit

PAID-FOR-SEARCH

Despite being the biggest online format, growth of search shows no sign of slowing

- Value: €19.1 billion
- Accounts for 45.6% of all online advertising spend
- Year-on-year growth of 12.9%
- Top five markets by value: the UK, Germany, France, Russia, and Sweden
- Top five markets by growth: Slovenia, Belarus, Sweden, Romania, and Ireland

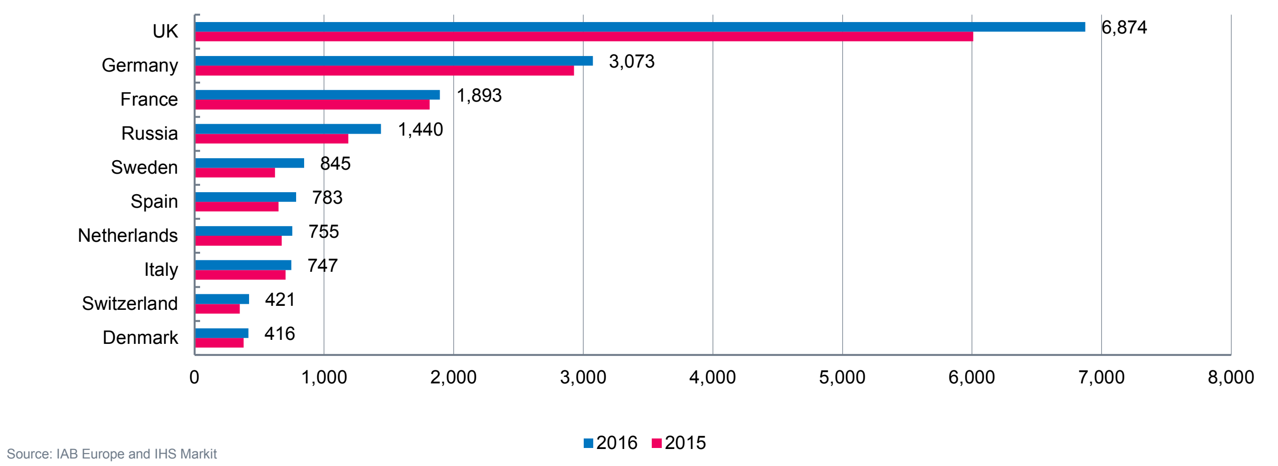
Paid-for-search advertising year-on-year growth (%)



Source: IAB Europe and IHS Markit

- Paid-for-search continues to attract a growing pool of small advertisers.
- As media attribution models evolve, the role of search in a broader media plan is increasingly well understood.
- The proliferation of e-commerce further fuels search.

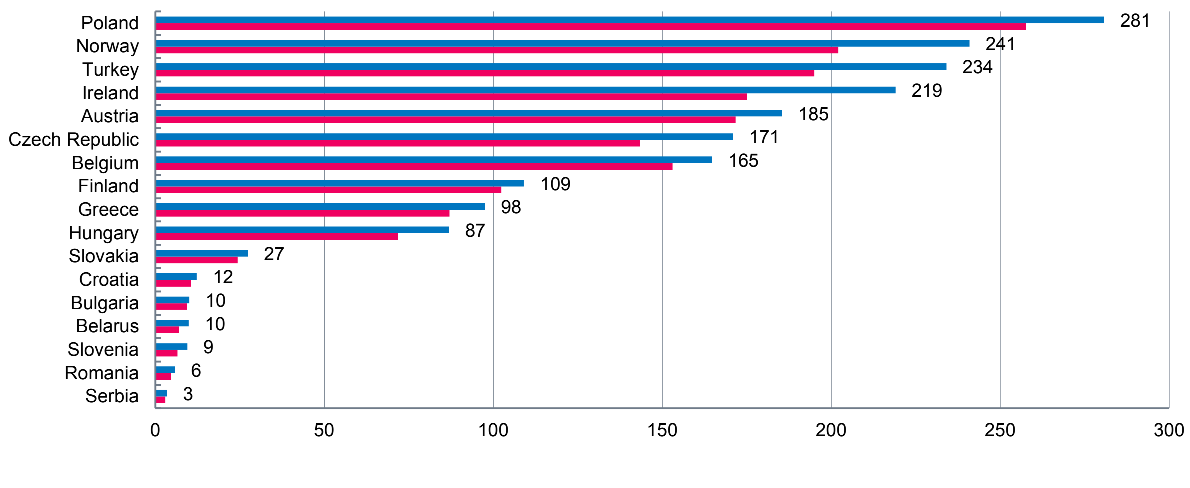
Top 10: paid-for-search value by country 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

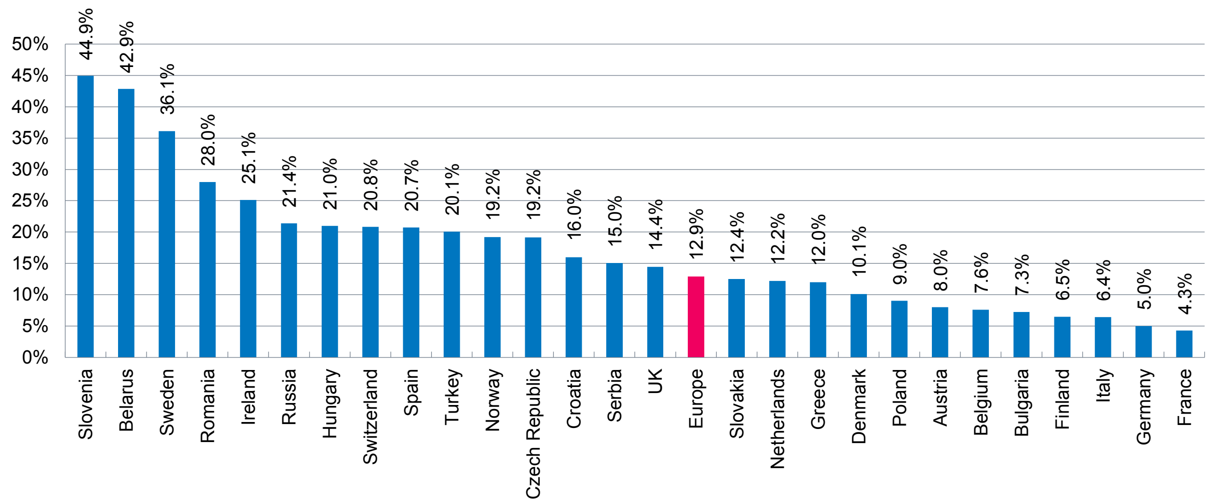
PAID-FOR-SEARCH

Rest of Europe: paid-for-search value by country 2015 and 2016 (€m)



Source: IAB Europe and IHS Markit

2016: paid-for-search year-on-year growth (%)

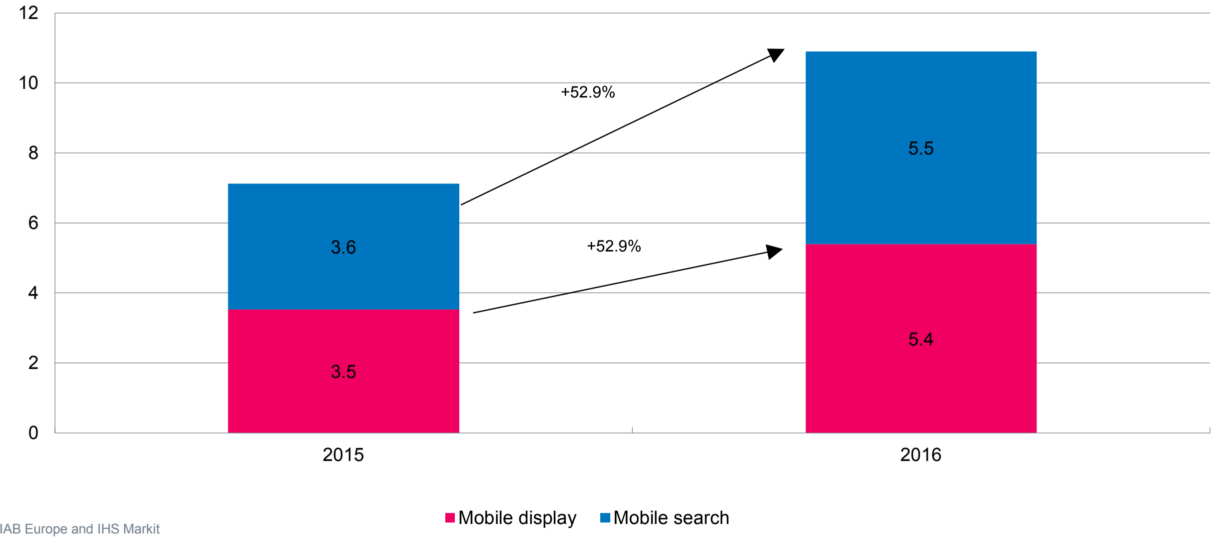


Source: IAB Europe and IHS Markit

MOBILE

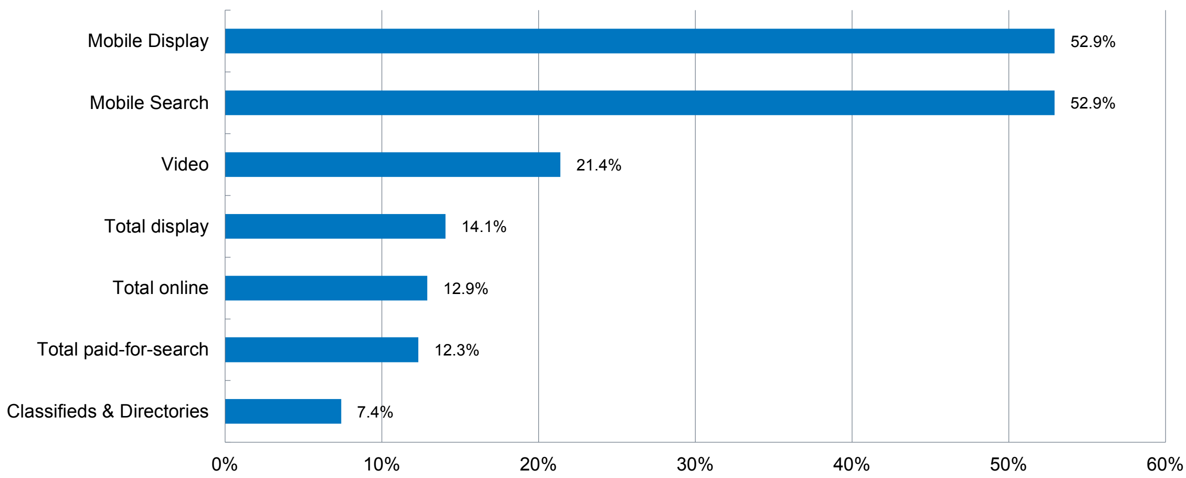
Mobile ad spend almost doubled within the last 12 months

Mobile advertising in Europe (€bn)



Source: IAB Europe and IHS Markit

Europe: online ad format year-on-year growth in 2016 (%)



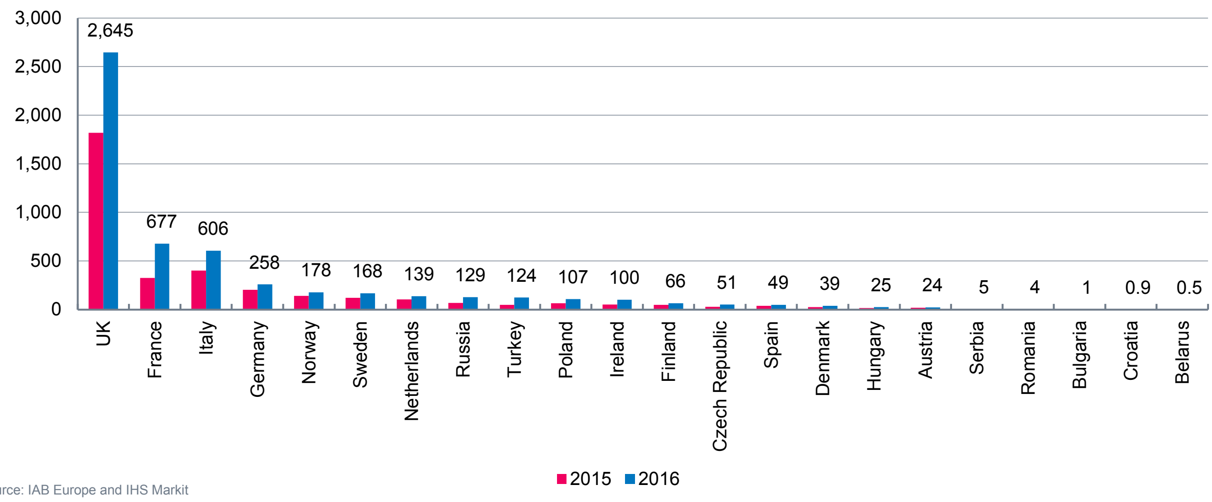
Source: IAB Europe and IHS Markit

MOBILE

Mobile display: European mobile display ad spend is dominated by mature markets, but growth in emerging markets is exploding

- 22 markets reported data
- Value: €5.4 billion
- Year-on-year growth of 52.9%
- Top five countries by value: the UK, France, Italy, Germany, and Norway
- Top five countries by growth: Serbia, Romania, Turkey, France, and Croatia

Mobile display advertising spend in 2016 (€m)

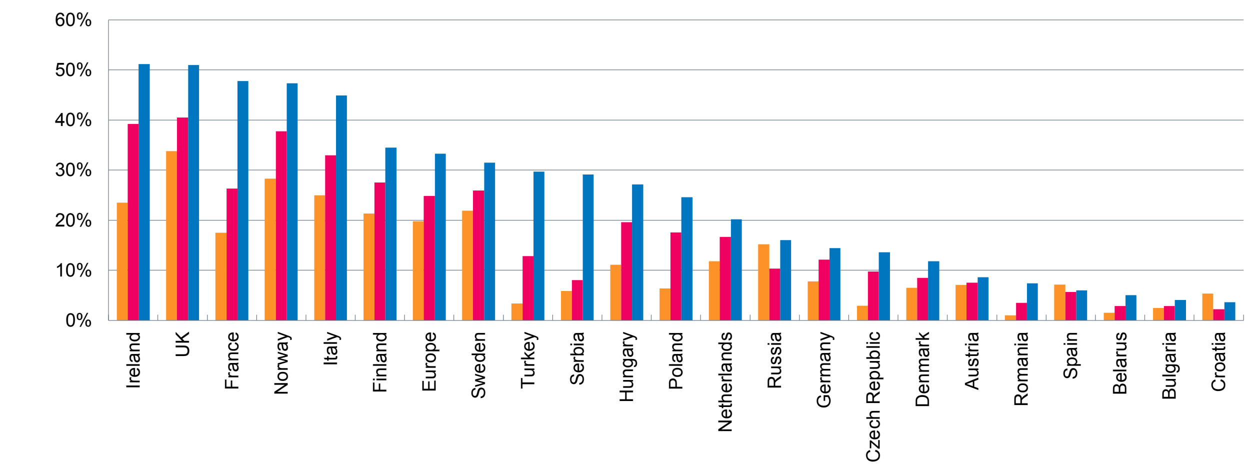


Source: IAB Europe and IHS Markit

- Social media advertising plays a significant role in mobile display growth.
- Creative innovation allows more seamless integration of mobile ad formats into media content, as banner overlays are being replaced by context-adaptive formats.

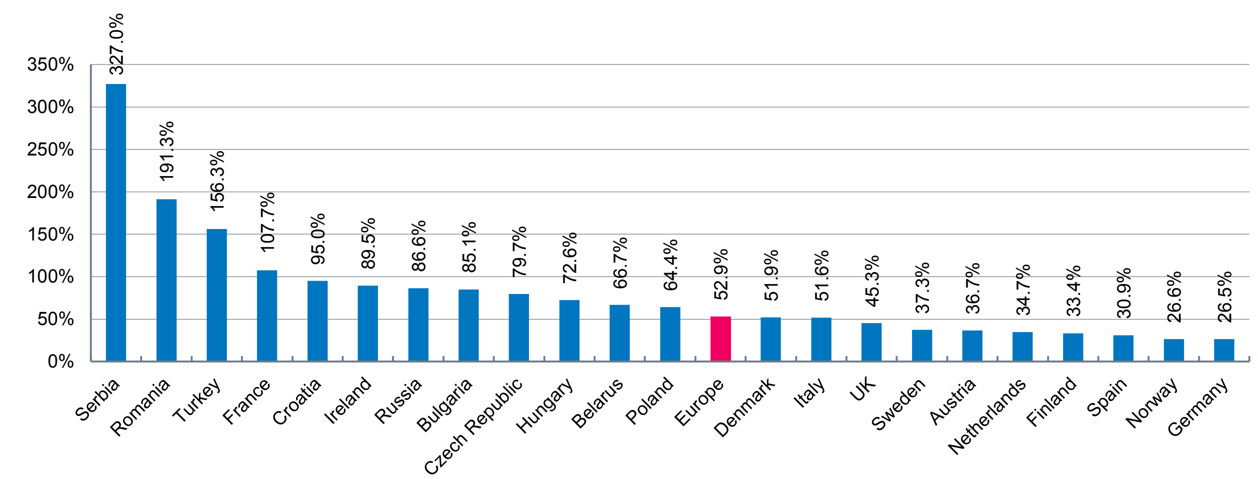
MOBILE

Mobile share of Display (%)



Source: IAB Europe and IHS Markit

2016: mobile display advertising year-on-year growth (%)



Source: IAB Europe and IHS Markit

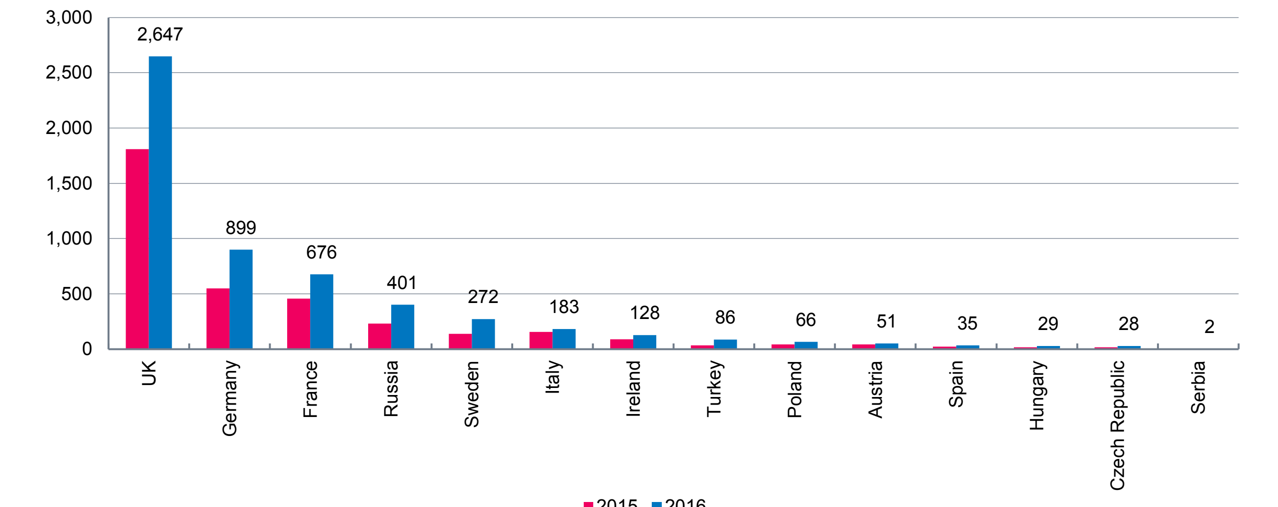
> We're now operating in a maturing European market that prioritizes mobile and video, with advertising strategies driven by a focus on optimizing communication to reach the mobile consumer. This has created exciting opportunities for smaller, nimble markets. These markets have shown a propensity towards innovation and the rapid uptake of new mobile and video opportunities, leading to exciting creative executions, great results and further growth and adoption. The significant growth across these formats (and others) also highlights the need to deliver a more extensive cross-marketing strategy with better attribution and a more holistic perspective into driving value.
>
> **Jakob Bak,** Co-Founder & Chief Technical Officer, Adform

MOBILE

Mobile search: mobile search expanded rapidly in mature markets

- 14 Markets reported data representing 88.8% of the European search market
- Value: €5.5 billion
- Year-on-year growth of 52.9%
- Top five markets by value: the UK, Germany, France, Russia, and Sweden
- Top five markets by growth: Turkey, Serbia, Sweden, Hungary, and Russia

Mobile search advertising in 2016 (€m)

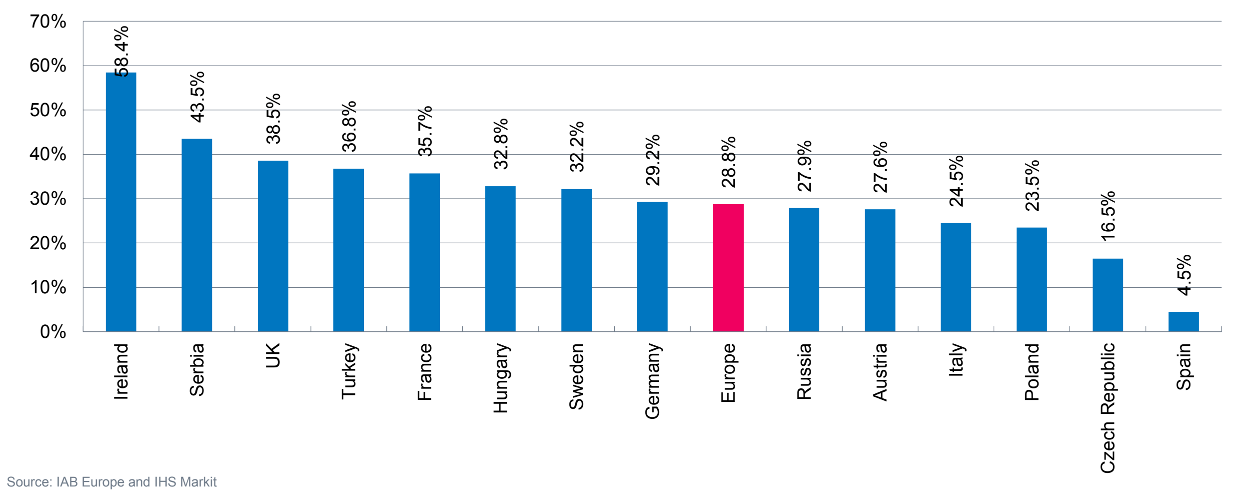


Source: IAB Europe and IHS Markit

- As a growing proportion of search comes from mobile devices, advertisers and search providers have improved the way to use search on these devices.
- Consumers conduct e-commerce increasingly on mobile devices, facilitated by integrated billing solutions and easy payment. The rise of e-commerce as a driver for search then is even further pronounced on mobile.

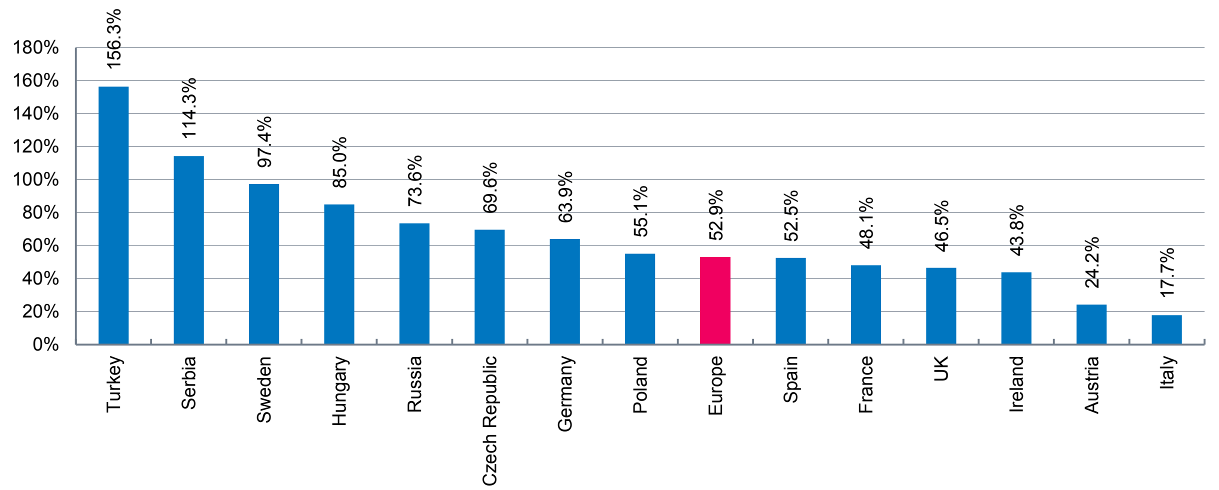
MOBILE

Mobile share of paid-for-search in 2016 (%)



Source: IAB Europe and IHS Markit

2016: mobile search advertising year-on-year growth (%)



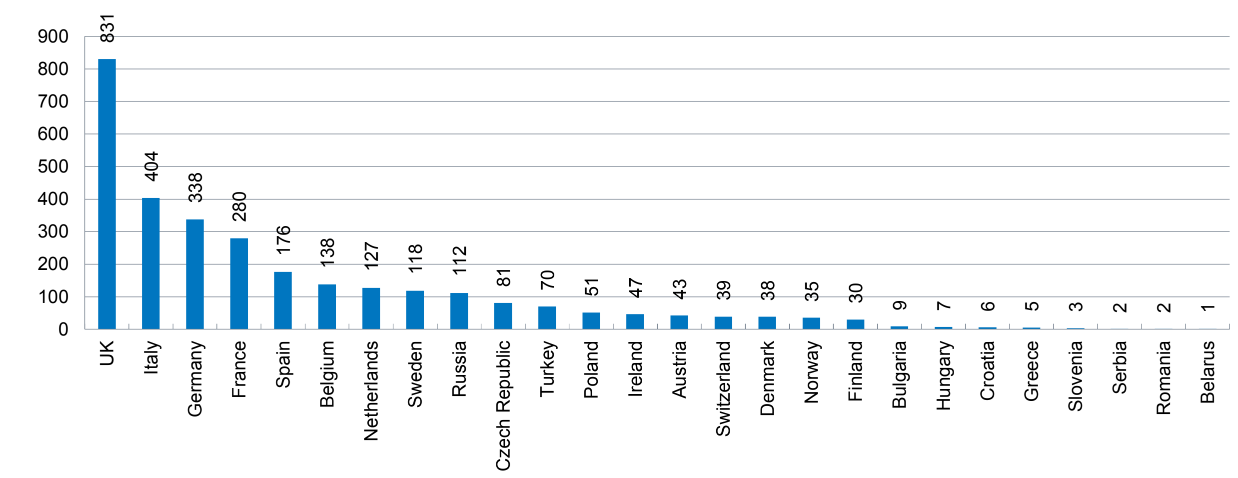
Source: IAB Europe and IHS Markit

VIDEO

Mature markets were the major contributors to the European video ad spend, but highest growth came from the emerging markets

- 24 markets reported data
- Value: €3 billion
- Year-on-year growth of 21.4%
- Top five markets by value: the UK, Italy, Germany, France, and Spain
- Top five markets by growth: Slovenia, Serbia, Belarus, Ireland, Croatia

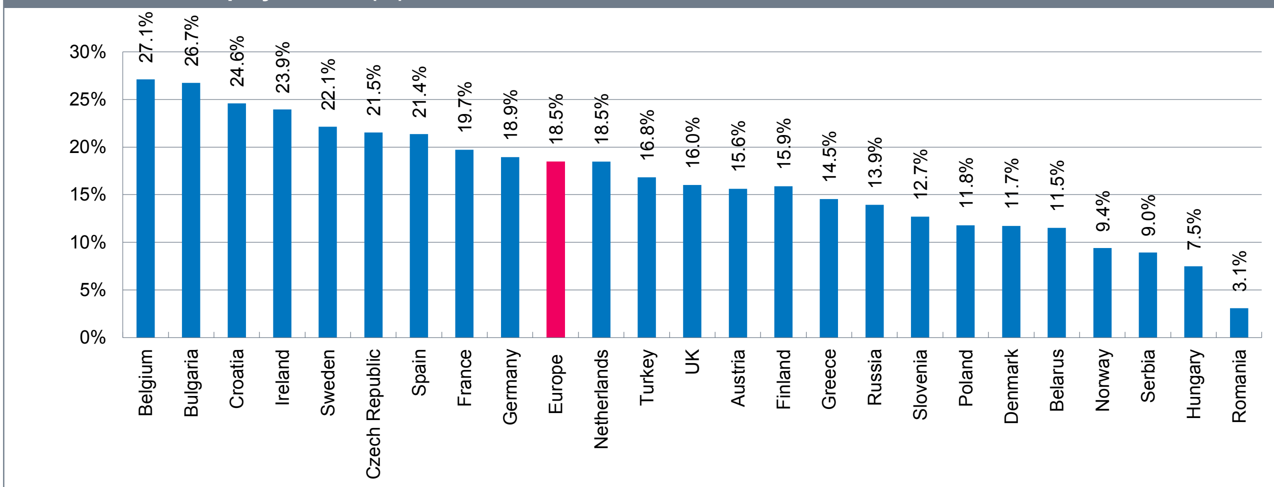
Video advertising in 2016 (€m)



Source: IAB Europe and IHS Markit

- Video continues to attract brand advertising budgets.
- An explosion of video content is unlocking new supply of inventory.
- As broadcasters embrace a 'total video' approach, more premium video inventory becomes available.
- Social platforms keep driving forward their video advertising efforts.

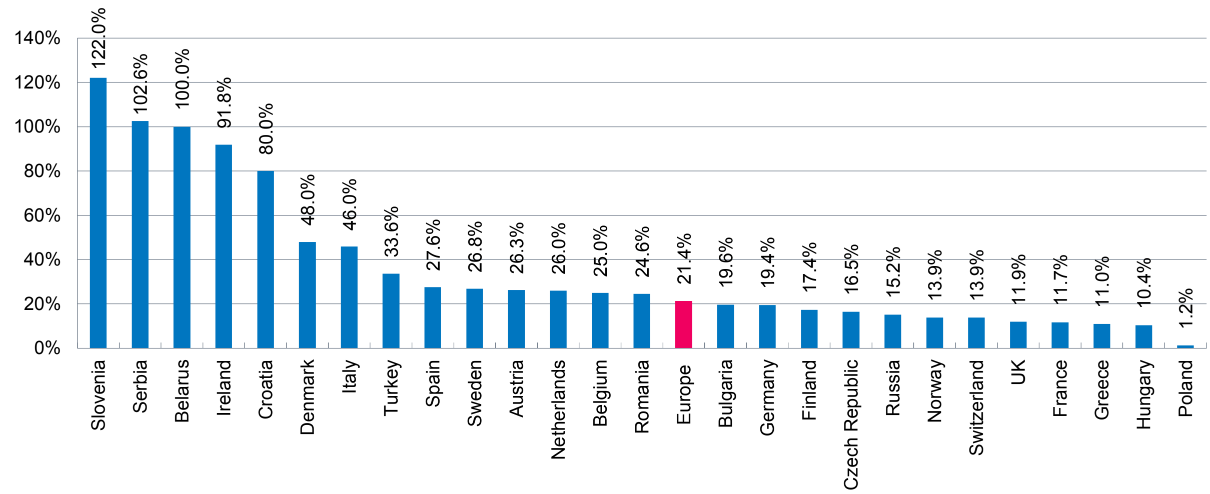
Video share of display in 2016 (%)



Source: IAB Europe and IHS Markit

VIDEO

2016: video advertising year-on-year growth (%)



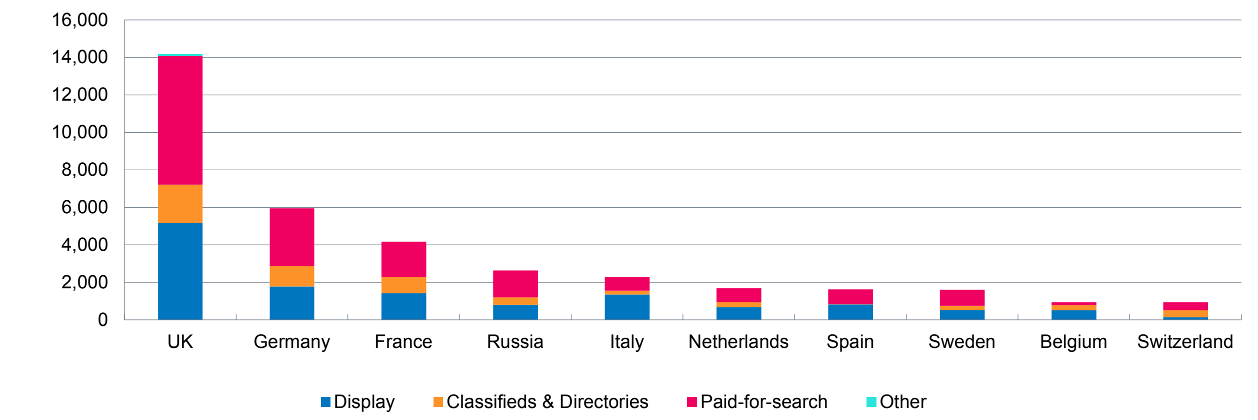
Source: IAB Europe and IHS Markit

Advertisers face an increasingly fragmented landscape, with legacy silos for media planning and buying across TV and digital. According to the Adobe Digital Insights Advertising Report, 47 percent of global marketers said that not having an integrated data and media buying solution was one of their biggest challenges.
The future of video will be reliant on meeting these challenges head-on through the development of a single platform that can: Plan, measure, buy and optimise video across formats and devices; Be fully transparent and open to third-party verification and: Is fully agnostic by not directing ad buys to owned inventory. Only then will the growth of video reach the heights it deserves.

Nick Reid, EMEA Head of Agency Partnerships, Adobe Advertising Cloud

TOP 10

Online ad spend by format and by country in 2016: top 10 (€m)



Source: IAB Europe and IHS Markit

	UK	Germany	France	Russia	Italy	Netherlands	Spain	Sweden	Belgium	Switzerland
Other	88.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Paid-for-search	6,874.4	3,073.0	1,893.0	1,439.6	747.0	755.0	783.4	845.3	164.7	421.4
Classifieds and Directories	2,032.1	1,091.9	865.5	396.6	199.0	245.0	14.0	223.9	273.4	371.3
Display	5,186.1	1,785.0	1,416.5	803.6	1,349.0	689.0	825.0	534.3	507.7	141.1

We are pleased with a very robust market development - digital advertising has been growing at a consistently high level for years. While online in Europe is already number one, we have reached the level of TV in Germany. The strongest drivers are still mobile and online video.

Paul Mudter, Chairman of the Online-Vermarkterkreis (OVK – Circle of Online Marketers) within the Bundesverband Digitale Wirtschaft (BVDW) e.V.

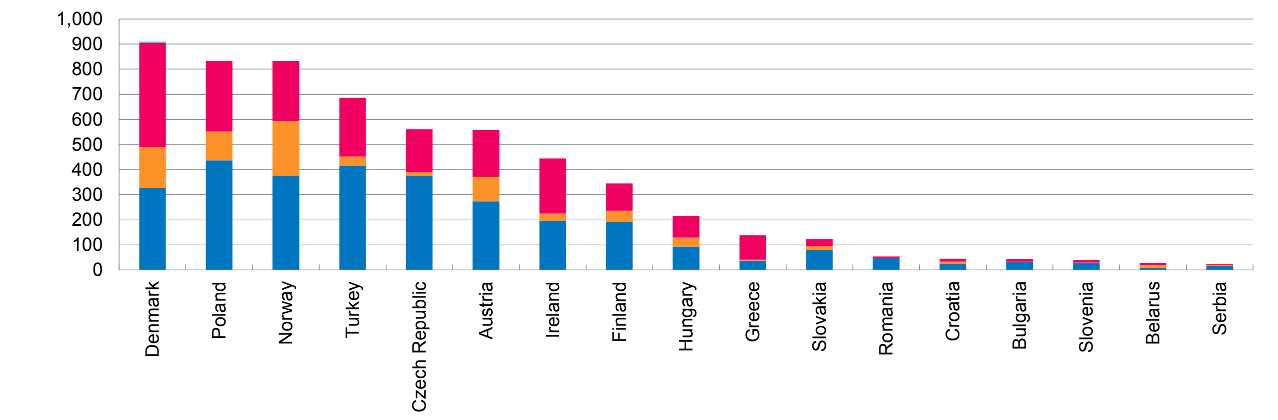
Similar to the UK, online advertising across Europe has consistently risen year-on-year, clearly establishing itself as the dominant advertising channel. It's encouraging to see Europe growing at a steady pace. Per head, the UK's digital spend is more than the next three largest markets combined, which is a clear indication that advertisers are embracing it as the smartest way to reach and wow consumers. Encouragingly, it also points to room for even further growth across Europe for the foreseeable future as advertisers' confidence and appreciation of sophisticated channels continues to grow.

Mobile is driving this growth across all markets, most notably in the UK, where mobile display accounts for 38% of all digital investments. Given its penetration, thanks in part to better data plans, smartphones have contributed to the exponential investment in mobile ads from native, video and interactive, designed to maximise engagement and provide users with the high-quality experiences they demand. A 103% year-on-year growth in the UK is a sign of advertiser confidence and proves digital media is thriving.

Jon Mew, CEO, IAB UK

REST OF EUROPE

Online ad spend by format and by country in 2016: rest of Europe (€m)



Source: IAB Europe and IHS Markit

	Denmark	Poland	Norway	Turkey	Czech Republic	Austria	Ireland	Finland	Hungary	Greece	Slovakia	Romania	Croatia	Bulgaria	Slovenia	Belarus	Serbia
Other	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Paid-for-search	416.3	280.7	240.9	234.1	170.9	185.4	219.0	109.0	86.9	97.5	27.4	5.9	12.3	10.1	9.5	9.9	3.5
Classifieds and Directories	163.0	115.9	216.2	35.5	15.5	99.0	29.0	45.9	36.3	3.6	14.0	0.0	8.0	0.7	3.0	9.3	2.6
Display	326.3	436.4	375.8	416.6	374.4	273.5	196.3	190.1	93.5	37.7	81.3	48.7	25.1	33.4	27.5	9.8	17.4

Online ad spend in Romania has increased more than five times in the last 10 years. The latest numbers show the potential and speed of development of Romania's market specifically, but also of the other markets in the CEE region. They are proof for the market's degree of professionalism and ambition to grow.

Gabriel Patru, President, IAB Romania and Head of Strategy, MEC Romania

ONLINE AD SPEND BY MARKET

Austria:

Online ad spend	€558m
Year-on-year growth	11.5%
Online ad spend per capita	€64.5

Belarus:

Online ad spend	€29m
Year-on-year growth	15.5%
Online ad spend per capita	€3.1

Belgium:

Online ad spend	€946m
Year-on-year growth	6.2%
Online ad spend per capita	€83.2

Bulgaria:

Online ad spend	€44m
Year-on-year growth	22.9%
Online ad spend per capita	€6.2

Croatia:

Online ad spend	€45m
Year-on-year growth	17.7%
Online ad spend per capita	€10.7

Czech Republic:

Online ad spend	€561m
Year-on-year growth	25.3%
Online ad spend per capita	€53.1

Denmark:

Online ad spend	€909m
Year-on-year growth	9.6%
Online ad spend per capita	€159.7

Finland:

Online ad spend	€345m
Year-on-year growth	5.8%
Online ad spend per capita	€62.5

France:

Online ad spend	€4,175m
Year-on-year growth	7.0%
Online ad spend per capita	€64.6

Germany:

Online ad spend	€5,950m
Year-on-year growth	6.4%
Online ad spend per capita	€71.9

Greece:

Online ad spend	€139m
Year-on-year growth	11.5%
Online ad spend per capita	€12.7

Hungary:

Online ad spend	€217m
Year-on-year growth	22.5%
Online ad spend per capita	€22.1

Ireland:

Online ad spend	€444m
Year-on-year growth	31.4%
Online ad spend per capita	€94.2

Italy:

Online ad spend	€2,295m
Year-on-year growth	10.1%
Online ad spend per capita	€38.4

Netherlands:

Online ad spend	€1,689m
Year-on-year growth	11.3%
Online ad spend per capita	€99.5

Norway:

Online ad spend	€833m
Year-on-year growth	5.3%
Online ad spend per capita	€158.0

ONLINE AD SPEND BY MARKET

Poland:

Online ad spend	€833m
Year-on-year growth	14.6%
Online ad spend per capita	€21.6

Romania:

Online ad spend	€55m
Year-on-year growth	36.9%
Online ad spend per capita	€2.8

Russia:

Online ad spend	€2,640m
Year-on-year growth	19.3%
Online ad spend per capita	€18.4

Serbia:

Online ad spend	€24m
Year-on-year growth	17.5%
Online ad spend per capita	€3.3

Slovakia:

Online ad spend	€123m
Year-on-year growth	23.6%
Online ad spend per capita	€22.6

Slovenia:

Online ad spend	€40m
Year-on-year growth	33.2%
Online ad spend per capita	€19.3

Spain:

Online ad spend	€1,622m
Year-on-year growth	22.3%
Online ad spend per capita	€35.2

Sweden:

Online ad spend	€1,604m
Year-on-year growth	21.8%
Online ad spend per capita	€162.8

Switzerland:

Online ad spend	€934m
Year-on-year growth	13.4%
Online ad spend per capita	€111.4

Turkey:

Online ad spend	€686m
Year-on-year growth	13.5%
Online ad spend per capita	€8.6

UK:

Online ad spend	€14,181m
Year-on-year growth	13.4%
Online ad spend per capita	€214.8

TOP PROPERTIES DECEMBER 2016

Top 20 sites in Austria

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		5,610	100.0
1	Google Sites	4,775	85.1
2	Microsoft Sites	3,341	59.6
3	Amazon Sites	2,437	43.4
4	Facebook	2,126	37.9
5	Yahoo Sites	1,656	29.5
6	Styria Media Group	1,228	21.9
7	Wikimedia Foundation Sites	1,204	21.5
8	Axel Springer SE	1,161	20.7
9	United-Internet Sites	1,114	19.9
10	Hubert Burda Media	1,100	19.6
11	Dropbox Sites	920	16.4
12	ORF.at Network	918	16.4
13	eBay	736	13.1
14	Apple Inc.	663	11.8
15	Deutsche Telekom	642	11.5
16	Raiffeisen	633	11.3
17	Valve Corporation	591	10.5
18	gutefrage.net GmbH	589	10.5
19	METRO Group	584	10.4
20	Gruner+Jahr Sites	579	10.3

Source: comScore MMX, Austria, Age 6+ December 2016

Top 20 sites in Belgium

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		7,259	100.0
1	Google Sites	5,704	78.6
2	Microsoft Sites	5,500	75.8
3	Facebook	4,204	57.9
4	Mediahuis Connect	3,164	43.6
5	Amazon Sites	2,036	28.0
6	Yahoo Sites	1,696	23.4
7	VRT Sites	1,667	23.0
8	Axel Springer SE	1,352	18.6
9	BitTorrent Network	1,295	17.8
10	2dehands	1,236	17.0
11	Belgacom Group	1,235	17.0
12	Groupe Figaro CCM Benchmark	1,232	17.0
13	Dropbox Sites	1,220	16.8
14	Linkedin	1,198	16.5
15	Webedia Sites	1,170	16.1
16	Apple Inc.	1,102	15.2
17	Roularta Media Group	1,082	14.9
18	Sanoma Group	1,072	14.8
19	Wikimedia Foundation Sites	1,067	14.7
20	BNP Paribas	1,058	14.6

Source: comScore MMX, Belgium, Age 6+ December 2016

Top 20 sites in Denmark

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		4,035	100.0
1	Google Sites	3,521	87.3
2	Microsoft Sites	2,652	65.7
3	Facebook	1,952	48.4
4	Eniro Group	1,390	34.4
5	Yahoo Sites	1,095	27.1
6	E-BOKS.DK	1,080	26.8
7	JP Politiken Hus	1,032	25.6
8	DR.DK	999	24.8
9	Spotify	986	24.4
10	Amazon Sites	883	21.9
11	Dropbox Sites	820	20.3
12	eBay	818	20.3
13	TV2 Danmark	803	19.9
14	Valve Corporation	783	19.4
15	Linkedin	777	19.3
16	Wikimedia Foundation Sites	774	19.2
17	Berlingske Media	755	18.7
18	DANID.DK	654	16.2
19	TDC Group	588	14.6
20	EMU.DK	573	14.2

Source: comScore MMX, Denmark, Age 6+ December 2016

Top 20 sites in Finland

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		3,751	100.0
1	Google Sites	3,400	90.6
2	Microsoft Sites	2,301	61.3
3	Sanoma Group	2,294	61.1
4	Facebook	2,165	57.7
5	Alma Media	1,747	46.6
6	Yleisradio Oy	1,399	37.3
7	Otavamedia	1,256	33.5
8	MTV Oy	1,161	30.9
9	Wikimedia Foundation Sites	1,111	29.6
10	Spotify	1,085	28.9
11	OP-Pohjola	1,057	28.2
12	Aller Media	896	23.9
13	Nordea Group	880	23.5
14	S-ryhma Sites	867	23.1
15	Yahoo Sites	863	23.0
16	Elisa Oyj	807	21.5
17	Fonecta Sites	792	21.1
18	SUOMI.FI	785	20.9
19	Schibsted Media Group	732	19.5
20	Kesko Sites	650	17.3

Source: comScore MMX, Finland, Age 6+ December 2016

TOP PROPERTIES DECEMBER 2016

Top 20 sites in France

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		43,108	100.0
1	Google Sites	40,639	94.3
2	Microsoft Sites	29,257	67.9
3	Facebook	27,968	64.9
4	Groupe Figaro CCM Benchmark	22,199	51.5
5	Amazon Sites	20,559	47.7
6	Webedia Sites	18,826	43.7
7	Yahoo Sites	16,463	38.2
8	Schibsted Media Group	15,568	36.1
9	Wikimedia Foundation Sites	15,423	35.8
10	Solocal Group	14,950	34.7
11	Orange Sites	14,856	34.5
12	Groupe Casino	14,641	34.0
13	La Poste	14,070	32.6
14	Groupe Lagardere	13,964	32.4
15	Iliad - Free.fr Sites	12,805	29.7
16	Gruner+Jahr Sites	12,618	29.3
17	Axel Springer SE	12,339	28.6
18	French Government Sites	11,009	25.5
19	Groupe Fnac	10,425	24.2
20	Groupe Credit Agricole	9,673	22.4

Source: comScore MMX, France, Age 6+ December 2016

Top 20 sites in Germany

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		56,289	100.0
1	Google Sites	52,302	92.9
2	Microsoft Sites	35,185	62.5
3	Amazon Sites	32,734	58.2
4	Facebook	32,028	56.9
5	eBay	27,559	49.0
6	Axel Springer SE	25,158	44.7
7	Hubert Burda Media	22,661	40.3
8	United-Internet Sites	22,594	40.1
9	Deutsche Telekom	21,172	37.6
10	Yahoo Sites	20,604	36.6
11	Wikimedia Foundation Sites	18,270	32.5
12	gutefrage.net GmbH	14,375	25.5
13	Otto Gruppe	14,056	25.0
14	PayPal	13,004	23.1
15	RTL Group Sites	12,554	22.3
16	Gruner+Jahr Sites	12,364	22.0
17	METRO Group	12,249	21.8
18	Sparkassen-Finanzgruppe	11,810	21.0
19	ARD Sites	10,315	18.3
20	Dropbox Sites	10,305	18.3

Source: comScore MMX, Germany, Age 6+ December 2016

Top 20 sites in Ireland

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		2,909	100.0
1	Google Sites	2,448	84.2
2	Microsoft Sites	1,747	60.1
3	Facebook	1,222	42.0
4	Yahoo Sites	882	30.3
5	Amazon Sites	865	29.7
6	Distilled SCH	832	28.6
7	Irish Times Group	546	18.8
8	Independent News & Media	514	17.7
9	Wikimedia Foundation Sites	498	17.1
10	RTE.IE	477	16.4
11	Linkedin	475	16.3
12	eBay	465	16.0
13	BBC Sites	460	15.8
14	Apple Inc.	451	15.5
15	BitTorrent Network	438	15.1
16	Dropbox Sites	438	15.1
17	Spotify	343	11.8
18	TripAdvisor Inc.	339	11.7
19	Mail Online / Daily Mail	338	11.6
20	Valve Corporation	320	11.0

Source: comScore MMX, Ireland, Age 6+ December 2016

Top 20 sites in Israel

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		4,679	100.0
1	Google Sites	4,298	91.9
2	Walla! Communications	2,523	53.9
3	Facebook	2,446	52.3
4	Microsoft Sites	2,394	51.1
5	Ynet Group	2,064	44.1
6	Mako	1,516	32.4
7	Wikimedia Foundation Sites	1,396	29.8
8	Dapey Zahav Group	1,148	24.5
9	Alibaba.com Corporation	803	17.2
10	Tapuz People	797	17.0
11	Yahoo Sites	764	16.3
12	TheMarker Group	751	16.0
13	Dropbox Sites	740	15.8
14	Amazon Sites	712	15.2
15	CET.AC.IL	691	14.8
16	Bank Hapoalim Group	659	14.1
17	Nana10 Group	658	14.1
18	BitTorrent Network	655	14.0
19	Bank Leumi Group	566	12.1
20	SheKnows Media	565	12.1

Source: comScore MMX, Israel, Age 6+ December 2016

TOP PROPERTIES DECEMBER 2016

Top 20 sites in Italy

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		28,430	100.0
1	Google Sites	25,988	91.4
2	Facebook	17,816	62.7
3	Microsoft Sites	15,989	56.2
4	Amazon Sites	12,983	45.7
5	ItaliaOnline	12,881	45.3
6	Gruppo Mondadori	11,991	42.2
7	Yahoo Sites	10,894	38.3
8	Wikimedia Foundation Sites	10,150	35.7
9	eBay	9,585	33.7
10	Triboo Media	9,382	33.0
11	RCS MediaGroup - Italian Digital Media	8,594	30.2
12	Gruppo Editoriale Espresso	8,591	30.2
13	Telecom Italia	6,758	23.8
14	Gruppo Mediaset	5,834	20.5
15	Dropbox Sites	5,723	20.1
16	Gruppo Poste Italiane	5,208	18.3
17	ilMeteo s.r.l.	4,863	17.1
18	Apple Inc.	4,799	16.9
19	Sky Italia	4,478	15.8
20	Schibsted Media Group	4,322	15.2

Source: comScore MMX, Italy, Age 6+ December 2016

Top 20 sites in Netherlands

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		13,518	100.0
1	Google Sites	11,997	88.8
2	Microsoft Sites	9,877	73.1
3	Facebook	8,567	63.4
4	Ahold Sites	5,814	43.0
5	Sanoma Group	5,717	42.3
6	eBay	5,232	38.7
7	Publieke Omroep	4,524	33.5
8	Telegraaf Media Groep	4,513	33.4
9	ING Group	4,222	31.2
10	Wikimedia Foundation Sites	4,061	30.0
11	Rabobank Group	3,884	28.7
12	De Persgroep	3,769	27.9
13	Yahoo Sites	3,757	27.8
14	Dropbox Sites	3,674	27.2
15	Dutch Government Sites	3,228	23.9
16	RTL Group Sites	3,196	23.6
17	Linkedin	3,168	23.4
18	Spotify	2,959	21.9
19	Amazon Sites	2,727	20.2
20	ABN AMRO	2,680	19.8

Source: comScore MMX, Netherlands, Age 6+ December 2016

Top 20 sites in Norway

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		3,615	100.0
1	Google Sites	2,961	81.9
2	Microsoft Sites	2,596	71.8
3	Schibsted Media Group	1,833	50.7
4	Facebook	1,741	48.1
5	Eniro Group	1,475	40.8
6	Amedia Sites	1,222	33.8
7	Spotify	1,211	33.5
8	NRK Sites	1,178	32.6
9	Yahoo Sites	1,120	31.0
10	Telenor	973	26.9
11	Aller Media	917	25.4
12	Amazon Sites	887	24.5
13	Wikimedia Foundation Sites	760	21.0
14	DIFI.NO	712	19.7
15	TV2 Sites	703	19.4
16	DnB Group	646	17.9
17	Dropbox Sites	586	16.2
18	Valve Corporation	585	16.2
19	Linkedin	526	14.6
20	Netflix Inc.	502	13.9

Source: comScore MMX, Norway, Age 6+ December 2016

Top 20 sites in Poland

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		20,500	100.0
1	Google Sites	18,360	89.6
2	MIH Limited	12,795	62.4
3	Axel Springer SE	12,361	60.3
4	Facebook	12,045	58.8
5	Wirtualna Polska	11,270	55.0
6	Microsoft Sites	9,681	47.2
7	Gazeta.pl Group	7,142	34.8
8	Interia.pl SA	6,672	32.5
9	OLX Inc.	6,109	29.8
10	Polskapresse	6,062	29.6
11	CDA.PL	5,629	27.5
12	Wikimedia Foundation Sites	5,500	26.8
13	Grupa Wirtualna Polska	5,454	26.6
14	TVN S.A.	4,220	20.6
15	Murator SA	4,046	19.7
16	Grupa Omnigence	3,904	19.0
17	Eurosport Sites	3,528	17.2
18	CHOMIKUJ.PL	3,022	14.7
19	Orange Sites	3,004	14.7
20	EURO.COM.PL	3,000	14.6

Source: comScore MMX, Poland, Age 6+ December 2016

TOP PROPERTIES DECEMBER 2016

Top 20 sites in Portugal

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		5,472	100.0
1	Google Sites	4,805	87.8
2	Microsoft Sites	3,602	65.8
3	Facebook	3,200	58.5
4	Portugal Telecom	2,491	45.5
5	Grupo Sonae	1,420	26.0
6	BET.PT	1,300	23.8
7	Yahoo Sites	1,214	22.2
8	INLINEMANUAL.COM	1,099	20.1
9	R7 Portal	1,017	18.6
10	Prisa	1,011	18.5
11	OLX Inc.	1,004	18.4
12	Grupo Globalmedia	992	18.1
13	Dropbox Sites	929	17.0
14	PORTALDASFINANCAS.GOV.PT	923	16.9
15	Grupo Cofina	887	16.2
16	BitTorrent Network	843	15.4
17	7Graus	825	15.1
18	Wikimedia Foundation Sites	802	14.7
19	Amazon Sites	770	14.1
20	RationalGroup	764	14.0

Source: comScore MMX, Portugal, Age 6+ December 2016

Top 20 sites in Russia

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		79,882	100.0
1	Mail.ru Group	74,339	93.1
2	Yandex Sites	55,712	69.7
3	Google Sites	52,156	65.3
4	Microsoft Sites	41,429	51.9
5	Rambler&Co	33,040	41.4
6	BitTorrent Network	28,800	36.1
7	Avito Sites	27,375	34.3
8	Ucoz Web Services	21,437	26.8
9	Alibaba.com Corporation	21,323	26.7
10	Kinogo Sites	20,095	25.2
11	Gazprom Media	18,652	23.4
12	Wikimedia Foundation Sites	18,074	22.6
13	Sberbank	17,699	22.2
14	Facebook	17,638	22.1
15	Hearst	16,416	20.6
16	Valve Corporation	13,237	16.6
17	KP Publishing House	12,394	15.5
18	FB.RU	11,900	14.9
19	Bolshoy Vopros	11,613	14.5
20	Rossiya Segodnya	11,508	14.4

Source: comScore MMX, Russia, Age 6+ December 2016

Top 20 sites in South Africa

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		8,356	100.0
1	Google Sites	6,885	82.4
2	Microsoft Sites	3,882	46.5
3	Facebook	2,995	35.8
4	MIH Limited	1,743	20.9
5	Yahoo Sites	1,562	18.7
6	Dropbox Sites	1,480	17.7
7	BitTorrent Network	1,479	17.7
8	FirstRand Group	1,269	15.2
9	Gumtree Sites	1,191	14.3
10	Amazon Sites	1,029	12.3
11	Apple Inc.	875	10.5
12	Linkedin	851	10.2
13	Wikimedia Foundation Sites	816	9.8
14	Barclays Bank	720	8.6
15	TAKEALOT.COM	657	7.9
16	Standard Bank Group	613	7.3
17	Avusa Group	595	7.1
18	OLX Inc.	572	6.9
19	CBS Interactive	557	6.7
20	PINTEREST.COM	538	6.4

Source: comScore MMX, South Africa, Age 6+ December 2016

Top 20 sites in Spain

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		22,185	100.0
1	Google Sites	20,696	93.3
2	Microsoft Sites	15,428	69.5
3	Facebook	13,023	58.7
4	Amazon Sites	9,383	42.3
5	RCS MediaGroup - Unidad Medios Digitales	9,341	42.1
6	Yahoo Sites	8,313	37.5
7	Prisa	7,629	34.4
8	Wikimedia Foundation Sites	7,483	33.7
9	Vocento	7,299	32.9
10	Dropbox Sites	5,859	26.4
11	Schibsted Media Group	5,490	24.7
12	BitTorrent Network	5,286	23.8
13	Grupo Godo	4,818	21.7
14	Henneo	4,523	20.4
15	Spotify	4,362	19.7
16	El Corte Ingles Group	4,352	19.6
17	Weblogs SL Sites	4,333	19.5
18	Linkedin	4,230	19.1
19	Gobierno De España	4,226	19.1
20	Atresmedia	4,161	18.8

Source: comScore MMX, Spain, Age 4+ December 2016

Note: The UK rankings utilise data from the comScore suite of UKOM approved products, namely comScore MMX Multi-Platform, comScore MMX, comScore Video Metrix.

TOP PROPERTIES DECEMBER 2016

Top 20 sites in Sweden

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		6,709	100.0
1	Google Sites	5,698	84.9
2	Microsoft Sites	4,430	66.0
3	Schibsted Media Group	3,271	48.8
4	Facebook	2,975	44.3
5	Bonnier Group	2,361	35.2
6	Spotify	2,246	33.5
7	Swedbank	1,878	28.0
8	Yahoo Sites	1,692	25.2
9	Eniro Group	1,633	24.3
10	Sveriges Television	1,608	24.0
11	Wikimedia Foundation Sites	1,424	21.2
12	Amazon Sites	1,265	18.9
13	KLARNA.COM	1,080	16.1
14	Linkedin	960	14.3
15	Apple Inc.	952	14.2
16	Stampen Media Group	942	14.0
17	Dropbox Sites	934	13.9
18	BitTorrent Network	933	13.9
19	CDON Group	848	12.6
20	eBay	838	12.5

Source: comScore MMX, Sweden, Age 6+ December 2016

Top 20 sites in Switzerland

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		5,430	100.0
1	Google Sites	4,315	79.5
2	Microsoft Sites	3,772	69.5
3	Facebook	1,897	34.9
4	Yahoo Sites	1,881	34.6
5	Swisscom Sites	1,367	25.2
6	Amazon Sites	1,272	23.4
7	Tamedia Sites	1,096	20.2
8	Apple Inc.	988	18.2
9	Axel Springer SE	939	17.3
10	Dropbox Sites	937	17.3
11	Wikimedia Foundation Sites	875	16.1
12	Linkedin	853	15.7
13	Schweizerische Post Sites	818	15.1
14	Deutsche Telekom	718	13.2
15	SRG SSR	676	12.4
16	Migros-Genossenschafts-Bund	674	12.4
17	Hubert Burda Media	669	12.3
18	Ringier Sites	566	10.4
19	Groupe Figaro CCM Benchmark	556	10.2
20	RAIFFEISEN.CH	548	10.1

Source: comScore MMX, Switzerland, Age 6+ December 2016

Top 20 sites in Turkey

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		36,372	100.0
1	Google Sites	29,535	81.2
2	Facebook	25,891	71.2
3	Yandex Sites	21,279	58.5
4	Microsoft Sites	20,166	55.4
5	Hurriyet Internet Group	14,048	38.6
6	Dogus Grubu	13,212	36.3
7	Milliyet Gazetecilik Ve Yayincilik	12,681	34.9
8	Wikimedia Foundation Sites	11,709	32.2
9	eBay	11,353	31.2
10	MEB.GOV.TR	10,279	28.3
11	Dogan Online	9,988	27.5
12	Twitter	8,697	23.9
13	Turkuvaz Yayin	8,464	23.3
14	SAHIBINDEN.COM	8,018	22.0
15	Nokta.com MEDYA	7,793	21.4
16	TURKIYE.GOV.TR	7,617	20.9
17	Yeni Medya	7,385	20.3
18	Mynet A.S.	7,114	19.6
19	FULLHDFILMIZLESENE.ORG	6,695	18.4
20	Yahoo Sites	6,620	18.2

Source: comScore MMX, Turkey, Age 6+ December 2016

Top 20 sites in UK

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		46,533	100.0
1	Google Sites	37,077	79.7
2	Microsoft Sites	33,111	71.2
3	Facebook	25,262	54.3
4	Amazon Sites	23,592	50.7
5	BBC Sites	18,758	40.3
6	Yahoo Sites	18,718	40.2
7	eBay	18,208	39.1
8	Wikimedia Foundation Sites	11,397	24.5
9	Apple Inc.	11,211	24.1
10	Home Retail Group	11,038	23.7
11	PayPal	10,170	21.9
12	WWW.GOV.UK	10,076	21.7
13	Dropbox Sites	9,723	20.9
14	Tesco Stores	8,697	18.7
15	Mail Online / Daily Mail	8,455	18.2
16	TripAdvisor Inc.	8,136	17.5
17	Sky Sites	8,110	17.4
18	Twitter	7,789	16.7
19	Lloyds Banking Group plc	7,745	16.6
20	Trinity Mirror Group	7,467	16.0

Source: comScore MMX, UK, Age 6+ December 2016

TOP MULTIPLATFORM PROPERTIES DECEMBER 2016

Finland

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	4,559	4,303	2,811	100.0	100.0	100.0
1	Google Sites	4,029	4,029		88.4	93.6	
2	Sanoma Group	3,688	2,800	2,606	80.9	65.1	92.7
3	Alma Media	3,500	2,424	2,517	76.8	56.3	89.5
4	Yleisradio Oy	3,296	2,029	2,471	72.3	47.2	87.9
5	MTV Oy	3,021	1,614	2,243	66.3	37.5	79.8
6	Microsoft Sites	3,018	2,997	168	66.2	69.7	6.0
7	Facebook	2,904	2,904		63.7	67.5	
8	Aller Media	2,512	1,309	1,710	55.1	30.4	60.8
9	Otavamedia	2,389	1,044	1,779	52.4	24.3	63.3
10	Schibsted Media Group	2,252	1,168	1,509	49.4	27.1	53.7

Source: comScore MMX MP, Finland, Age 6+, December 2016

France

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	45,471	43,108	18,333	100.0	100.0	100.0
1	Google Sites	42,357	40,610	18,310	93.2	94.2	99.9
2	Facebook	33,861	27,529	17,869	74.5	63.9	97.5
3	Microsoft Sites	32,138	30,395	7,252	70.7	70.5	39.6
4	Groupe Figaro CCM Benchmark	25,620	20,668	11,148	56.3	47.9	60.8
5	Webedia Sites	24,592	19,317	11,193	54.1	44.8	61.1
6	Amazon Sites	19,318	14,942	8,028	42.5	34.7	43.8
7	Schibsted Media Group	19,028	13,949	8,831	41.8	32.4	48.2
8	Yahoo Sites	18,152	15,772	4,831	39.9	36.6	26.4
9	Wikimedia Foundation Sites	17,977	13,610	7,628	39.5	31.6	41.6
10	Solocal Group	17,742	12,840	8,111	39.0	29.8	44.2

Source: comScore MMX MP, France, Age 6+, December 2016

MMX Multi-Platform uses comScore census-based methodology for smartphone and tablet that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.

To learn more about MMX Multi-Platform, please visit: www.comScore.com/mmx-mp

TOP MULTIPLATFORM PROPERTIES DECEMBER 2016

Germany

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	58,564	56,289	37,648	100.0	100.0	100.0
1	Google Sites	55,972	54,823	27,090	95.6	97.4	72.0
2	Facebook	42,744	33,298	26,519	73.0	59.2	70.4
3	Microsoft Sites	40,409	37,142	6,849	69.0	66.0	18.2
4	Amazon Sites	36,578	29,686	16,597	62.5	52.7	44.1
5	eBay	34,662	26,440	18,147	59.2	47.0	48.2
6	Axel Springer SE	34,393	24,798	20,328	58.7	44.1	54.0
7	Deutsche Telekom	30,832	21,101	18,108	52.6	37.5	48.1
8	Hubert Burda Media	29,307	22,079	13,463	50.0	39.2	35.8
9	United-Internet Sites	25,517	20,472	8,310	43.6	36.4	22.1
10	Yahoo Sites	25,395	20,018	8,910	43.4	35.6	23.7

Source: comScore MMX MP, Germany, Age 6+, December 2016

Italy

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	37,298	27,950	28,664	100.0	100.0	100.0
1	Google Sites	34,334	26,628	21,290	92.1	95.3	74.3
2	Facebook	29,884	18,723	20,582	80.1	67.0	71.8
3	ItaliaOnline	23,926	12,702	17,066	64.1	45.4	59.5
4	Gruppo Mondadori	23,608	11,348	17,186	63.3	40.6	60.0
5	Gruppo Editoriale Espresso	22,638	8,680	18,033	60.7	31.1	62.9
6	RCS MediaGroup - Italian Digital Media	21,815	9,192	16,648	58.5	32.9	58.1
7	Triboo Media	20,662	9,372	15,290	55.4	33.5	53.3
8	Yahoo Sites	20,409	10,750	13,868	54.7	38.5	48.4
9	Gruppo Mediaset	20,330	8,242	15,624	54.5	29.5	54.5
10	Amazon Sites	18,725	10,634	11,972	50.2	38.0	41.8

Source: comScore MMX MP, Italy, Age 6+, December 2016

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To learn more about MMX Multi-Platform, please visit: www.comScore.com/mmx-mp

TOP MULTIPLATFORM PROPERTIES DECEMBER 2016

Netherlands

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	14,216	13,518	9,363	100.0	100.0	100.0
1	Google Sites	12,616	12,616		88.7	93.3	
2	Microsoft Sites	10,415	10,346	726	73.3	76.5	7.8
3	Sanoma Group	10,355	6,249	8,228	72.8	46.2	87.9
4	Facebook	9,184	9,184		64.6	67.9	
5	Spotify	5,764	2,965	3,842	40.5	21.9	41.0
6	eBay	5,108	5,106	12	35.9	37.8	0.1
7	Yahoo Sites	4,816	4,181	1,320	33.9	30.9	14.1
8	Ahold Sites	4,598	4,598		32.3	34.0	
9	Wegener Sites	4,439	1,368	3,565	31.2	10.1	38.1
10	Wikimedia Foundation Sites	4,263	4,263		30.0	31.5	

Source: comScore MMX MP,Netherlands, Age 6+, December 2016

Russia

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	87,498	80,566	41,372	100.0	100.0	100.0
1	Mail.ru Group	80,817	80,095	5,734	92.4	99.4	13.9
2	Yandex Sites	73,597	73,597		84.1	91.4	
3	Google Sites	61,479	61,479		70.3	76.3	
4	Avito Sites	48,704	43,135	17,266	55.7	53.5	41.7
5	Microsoft Sites	43,824	43,806	151	50.1	54.4	0.4
6	Rambler&Co	36,556	30,077	14,703	41.8	37.3	35.5
7	BitTorrent Network	26,270	26,270	9	30.0	32.6	0.0
8	Gazprom Media	25,342	20,959	8,424	29.0	26.0	20.4
9	Facebook	24,952	24,952		28.5	31.0	
10	Alibaba.com Corporation	21,893	21,893		25.0	27.2	

Source: comScore MMX MP, Russia, Age 6+, December 2016

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TOP MULTIPLATFORM PROPERTIES DECEMBER 2016

Spain

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	32,630	22,185	26,957	100.0	100.0	100.0
1	Google Sites	30,932	21,453	22,268	94.8	96.7	82.6
2	Facebook	27,067	13,173	21,807	83.0	59.4	80.9
3	RCS MediaGroup - Unidad Medios Digitales	23,436	9,316	19,529	71.8	42.0	72.4
4	Prisa	22,495	8,579	18,621	68.9	38.7	69.1
5	Vocento	21,014	7,307	17,583	64.4	32.9	65.2
6	Microsoft Sites	18,706	16,118	6,710	57.3	72.7	24.9
7	Grupo Godo	17,444	4,671	14,911	53.5	21.1	55.3
8	Schibsted Media Group	17,007	6,127	13,319	52.1	27.6	49.4
9	CM Nativos	16,151	5,349	12,791	49.5	24.1	47.4
10	Henneo	15,853	4,556	13,087	48.6	20.5	48.5

Source: comScore MMX MP, Spain, Age 4+, December 2016

Turkey

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	43,010	36,372	20,089	100.0	100.0	100.0
1	Google Sites	33,903	33,903		78.8	93.2	
2	Facebook	27,195	27,195		63.2	74.8	
3	Microsoft Sites	19,573	19,397	1,176	45.5	53.3	5.9
4	Yandex Sites	19,411	19,411		45.1	53.4	
5	Dogan TV	18,807	12,031	11,857	43.7	33.1	59.0
6	Nokta.com MEDYA	17,236	10,651	10,943	40.1	29.3	54.5
7	Hurriyet Internet Group	16,329	12,420	8,441	38.0	34.1	42.0
8	SAHIBINDEN.COM	15,657	8,442	10,598	36.4	23.2	52.8
9	SOZCU.COM.TR	15,343	4,640	12,938	35.7	12.8	64.4
10	EKSISOZLUK.COM	15,084	5,534	11,926	35.1	15.2	59.4

Source: comScore MMX MP, Turkey, Age 6+, December 2016

MMX Multi-Platform uses comScore census-based methodology for smartphone and tablet that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.
To learn more about MMX Multi-Platform, please visit: www.comScore.com/mmx-mp

TOP MULTIPLATFORM PROPERTIES DECEMBER 2016

UK

	Media	Total Unique Visitors/Viewers (000)			% Reach		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	50,275	46,533	36,398	100.0	100.0	100.0
1	Google Sites	47,644	43,333	34,161	94.8	93.1	93.9
2	Microsoft Sites	41,357	34,220	17,859	82.3	73.5	49.1
3	Facebook	40,832	26,777	33,112	81.2	57.5	91.0
4	BBC Sites	38,952	19,601	32,321	77.5	42.1	88.8
5	Amazon Sites	38,116	20,921	29,106	75.8	45.0	80.0
6	Trinity Mirror Group	31,666	8,184	27,046	63.0	17.6	74.3
7	eBay	31,148	17,050	20,482	62.0	36.6	56.3
8	Yahoo Sites	30,677	19,893	16,637	61.0	42.8	45.7
9	Sky Sites	30,008	8,462	24,904	59.7	18.2	68.4
10	Mail Online / Daily Mail	29,335	9,310	24,114	58.4	20.0	66.3

Source: comScore MMX MP, UK, Age 6+, December 2016

MMX Multi-Platform uses comScore census-based methodology for smartphone and tablet that reports on only tagged entities. Properties which only tag some of their assets (e.g. website but not app) or partially tag (e.g. homepage only) will only be measured on those tagged assets, which will have an impact on the total reported metrics of their entity.
To learn more about MMX Multi-Platform, please visit: http://www.comScore.com/Products/Audience-Analytics/Media-Metrix-Multi-Platform

Note: The UK rankings utilise data from the comScore suite of UKOM approved products, namely comScore MMX Multi-Platform, comScore MMX, comScore Video Metrix

TOP VIDEO MULTIPLATFORM PROPERTIES APRIL 2017

Spain

	Media	Total Digital Video		Desktop		Total Mobile	
		Reach (000)	% Reach Digital Pop	Reach (000)	% Reach Digital Pop	Reach (000)	% Reach Digital Pop
	Total Internet : Total Audience	32,630	100.00	22,185	100.00	26,957	100.00
1	Google Sites	26,803	82.14	15,999	72.12	22,524	83.56
2	BroadbandTV	19,124	58.61	5,996	27.03	14,017	52.00
3	VEVO	18,173	55.69	6,406	28.87	12,585	46.69
4	Warner Music	16,870	51.70	6,214	28.01	11,381	42.22
5	Facebook	9,393	28.79	9,393	42.34		
6	Maker Studios Inc.	8,366	25.64	2,506	11.30	6,138	22.77
7	Fullscreen Media Network	7,930	24.30	2,333	10.52	5,857	21.73
8	ZEFR	7,085	21.71	2,573	11.60	4,723	17.52
9	Webedia Sites	6,568	20.13	2,017	9.09	4,754	17.63
10	ZOOMIN.TV	6,559	20.10	1,636	7.37	5,136	19.05

Source: comScore MMX MP, Spain, Age 6+, April 2017

UK

	Media	Total Digital Video		Desktop		Total Mobile	
		Reach (000)	% Reach Digital Pop	Reach (000)	% Reach Digital Pop	Reach (000)	% Reach Digital Pop
	Total Internet : Total Audience	50,275	100.00	46,533	100.00	36,398	100.00
1	Google Sites	39,773	79.11	27,618	59.35	30,519	83.85
2	BroadbandTV	23,404	46.55	7,300	15.69	17,320	47.59
3	Warner Music	22,475	44.70	8,380	18.01	15,239	41.87
4	VEVO	21,058	41.89	7,694	16.53	14,395	39.55
5	Fullscreen Media Network	17,642	35.09	4,966	10.67	13,461	36.98
6	Facebook	17,350	34.51	17,350	37.29		
7	Maker Studios Inc.	16,230	32.28	4,683	10.06	12,242	33.64
8	Studio71 Network	13,700	27.25	3,535	7.60	10,713	29.43
9	ZEFR	13,218	26.29	4,454	9.57	9,274	25.48
10	Machinima Entertainment	10,303	20.49	2,913	6.26	7,759	21.32

Source: comScore MMX MP, UK, Age 6+, April 2017

TOP VIDEO PROPERTIES DECEMBER 2016

Top 10 sites in Ireland

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		2,909	77.85
1	Google Sites	2,486	66.55
2	Facebook	904	24.20
3	VEVO	696	18.62
4	Warner Music	622	16.64
5	BroadbandTV	592	15.84
6	Maker Studios Inc.	414	11.08
7	Machinima Entertainment	398	10.65
8	Vimeo	397	10.61
9	Fullscreen Media Network	355	9.50
10	ZEFR	338	9.03

Source: comScore Video Metrix, Ireland, Age 6+, December 2016

Top 10 sites in Italy

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		28,430	48.51
1	Google Sites	22,259	37.98
2	Facebook	15,287	26.09
3	VEVO	7,641	13.04
4	Warner Music	6,712	11.45
5	EPrice	5,580	9.52
6	BroadbandTV	5,510	9.40
7	Gruppo Mondadori	5,248	8.96
8	Maker Studios Inc.	5,119	8.74
9	Vimeo	4,896	8.36
10	Triboo Media	4,291	7.32

Source: comScore Video Metrix, Italy, Age 6+, December 2016

Top 10 sites in Netherlands

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		13,518	89.23
1	Google Sites	10,500	69.31
2	Facebook	6,940	45.81
3	VEVO	3,104	20.49
4	Vimeo	2,964	19.56
5	BroadbandTV	2,678	17.68
6	Warner Music	2,659	17.56
7	Publieke Omroep	2,306	15.22
8	Maker Studios Inc.	1,770	11.69
9	Microsoft Sites	1,612	10.64
10	Machinima Entertainment	1,572	10.38

Source: comScore Video Metrix, Netherlands, Age 6+, December 2016

Top 10 sites in Norway

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		3,615	88.28
1	Google Sites	2,789	68.10
2	Facebook	1,309	31.95
3	VEVO	1,001	24.43
4	BroadbandTV	987	24.10
5	Warner Music	929	22.68
6	Vimeo	816	19.92
7	Maker Studios Inc.	755	18.43
8	Fullscreen Media Network	694	16.94
9	ZEFR	512	12.51
10	Machinima Entertainment	456	11.13

Source: comScore Video Metrix, Norway, Age 6+, December 2016

Top 10 sites in Russia

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		79,882	62.68
1	Google Sites	73,489	57.66
2	Mail.ru Group	43,062	33.79
3	Yandex Sites	28,417	22.30
4	BroadbandTV	22,983	18.03
5	QuizGroup	21,519	16.88
6	MYVI.RU	16,520	12.96
7	Gazprom Media	14,877	11.67
8	Kinogo Sites	14,085	11.05
9	MEGOGO.NET	13,010	10.21
10	Vimeo	12,674	9.95

Source: comScore Video Metrix, Russia, Age 6+, December 2016

Top 10 sites in Spain

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		22,185	51.32
1	Google Sites	20,171	46.66
2	Facebook	10,660	24.66
3	VEVO	7,758	17.95
4	Warner Music	7,094	16.41
5	BroadbandTV	6,785	15.69
6	Vimeo	4,191	9.69
7	Maker Studios Inc.	4,057	9.38
8	Machinima Entertainment	4,027	9.31
9	Digiteka	3,254	7.53
10	ZEFR	3,241	7.50

Source: comScore Video Metrix, Spain, Age 4+, December 2016

TOP VIDEO PROPERTIES DECEMBER 2016

Top 10 sites in Sweden

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		6,709	87.46
1	Google Sites	5,154	67.19
2	Facebook	2,421	31.56
3	BroadbandTV	1,904	24.82
4	Warner Music	1,645	21.45
5	VEVO	1,638	21.35
6	Maker Studios Inc.	1,484	19.34
7	Bonnier Group	1,269	16.54
8	Fullscreen Media Network	1,250	16.30
9	Vimeo	1,134	14.79
10	ZEFR	936	12.20

Source: comScore Video Metrix, Sweden, Age 6+, December 2016

Top 10 sites in Turkey

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		36,372	50.96
1	Google Sites	20,173	28.27
2	Facebook	19,004	26.63
3	Dogan TV	10,742	15.05
4	VOOXE.COM	9,224	12.92
5	Nokta.com MEDYA	7,351	10.30
6	VEVO	67,13	9.41
7	BroadbandTV	5,927	8.30
8	Mail.ru Group	5,434	7.61
9	DAILYMOTION.COM	5,355	7.50
10	Yeni Medya	4,937	6.92

Source: comScore Video Metrix, Turkey, Age 6+, December 2016

Top 10 sites in UK

Media/Measures		Total Unique Visitors (000)	% Reach
Total Internet : Total Audience		46,533	76.66
1	Google Sites	34,443	56.74
2	Facebook	18,495	30.47
3	VEVO	8,808	14.51
4	Warner Music	8,127	13.39
5	BroadbandTV	7,246	11.94
6	Vimeo	7,233	11.92
7	Yahoo Sites	6,698	11.03
8	Microsoft Sites	6,237	10.28
9	Maker Studios Inc.	5,918	9.75
10	Fullscreen Media Network	5,078	8.37

Source: comScore Video Metrix, UK, Age 6+, December 2016

Note: The UK rankings utilise data from the comScore suite of UKOM approved products, namely comScore MMX Multi-Platform, comScore MMX, comScore Video Metrix.

BROADBAND PENETRATION IN 2016

Country	Penetration
Austria	63.3%
Belarus	71.1%
Belgium	77.9%
Bulgaria	44.6%
Croatia	68.3%
Czech Republic	54.5%
Denmark	92.8%
Finland	71.9%
France	71.1%
Germany	72.7%
Greece	66.5%
Hungary	63.6%
Ireland	69.0%
Italy	50.5%
Netherlands	84.1%
Norway	85.3%
Poland	48.5%
Romania	58.5%
Russia	40.0%
Serbia	58.7%
Slovakia	65.4%
Slovenia	60.8%
Spain	64.2%
Sweden	76.1%
Switzerland	93.4%
Turkey	38.0%
UK	85.4%

Source: IHS Markit

APPENDICES

Appendix i: Definition of formats

Online display advertising

Banners, buttons, skyscrapers, overlays, interstitials, pop ups displayed on a website.

Online video advertising

There are numerous definitions of Online Video advertising. Principally included can be:

- in-stream video advertising (pre-rolls, mid-rolls, post-rolls)
- in-stream banner overlays
- out-of-stream video advertising (e.g. self-play video on social network, not embedded in non-advertising video content)
- contextual video advertising (e.g. branded video players, contextual banner advertising sold against video content)

For the AdEx Benchmark report, online video advertising is defined as in-stream video advertising (pre-rolls, mid-rolls, post-rolls) as agreed by the IAB Europe Video Working Group in 2012.

Affiliate marketing

Fees paid to third party (affiliate) for traffic generation (e.g. pay-per-visit). Note: for the time being affiliate spend will be included in Display spend in the Ad Ex survey (rather than reported as stand-alone category).

Online classifieds

A fee is paid by an advertiser to display an ad or listing around a specific vertical such as automotive, recruiting and real estate, regardless of the outcome of the ad (i.e., the fee is paid even if there is no ‘sale’).

Online directories

Online version of printed yellow pages (business listing paid for by advertiser).

Paid-For-Search advertising

Advertising appearing on specific word requests on search engines.

Search engine optimisation

(excluded from the AdEx Benchmark report)

Fees paid to a third party to improve website ranking in search engines.

Integrated content

Advertising space without a direct link to the advertiser’s website, including tenancies and sponsorships (see below for detailed definitions of these).

E-mail Marketing

(excluded from the AdEx Benchmark report)

Where the body of the email is determined by the advertiser and is sent on their behalf by an email list manager/owner.

Newsletter advertising

Advertising (text or banner) that appears around the unrelated editorial content of email newsletters.

Mobile Display Advertising

Any display advertising viewed or read on a mobile phone including rich media advertising. This could be browser-based as well as in-app.

Mobile Search Advertsing

Advertising appearing on specific word requests on search engines, viewed on a mobile device.

Mobile advertising - SMS/MMS

3rd party ads in SMS and outbound SMS only - this includes advertising either within the body copy of an SMS / MMS message, or outbound messaging.

Mobile advertising - other

All other mobile advertising (e.g. mobile classifieds).

Online Auctions

The fees received by online auction houses, e.g. ebay, from successful sales through their sites

APPENDICES

In-game advertising

Fees paid for advertising, sponsorship or product placements within an online game.

Tenancies

Long term partnership between advertiser and media owner. Media owner benefits from content or service offered by tenant to their customers, although media space may be paid for in usual ways.

Sponsorships

Advertiser sponsorships of content areas.

Interruptive formats

A type of internet Display advertising that interrupts the user experience with the page content e.g. pop ups, overlays.

Programmatic buying

Advertising revenue that is generated through transactional or workflow automation mechanisms embedded in an infrastructure that relies on a set of rules applied by software and algorithms, commonly known as 'ad tech'. Following the IAB's proposed taxonomy, 'programmatic' here is an aggregate category that is composed of four discrete transactional models, each of which we consider a sub-set:
(1) Automated Guaranteed,
(2) Unreserved Fixed Rate,
(3) Invitation-Only Auction,
(4) Open Auction.

Advertising revenues are recognised as 'programmatic' whenever any of those mechanisms applies, irrespective of the inventory owner's awareness of their involvement.

This means that revenue is also considered programmatic if inventory that is originally sold to an intermediary through non-programmatic means (e.g. agency bulk buying) is re-sold to an end-buyer programmatically.

Revenue is recognised as programmatic irrespective of whether the inventory owner acts directly, or indirectly via an intermediary.

The rate of revenue is net of any fees, commissions, service charges and any other deductions.

The following four formats are collated as part of the AdEx Benchmark report.

- **Display advertising:** includes online display advertising, online video advertising, affiliate marketing, integrated content, newsletter advertising, interactive television, programmatic buying, real-time bidding, in-game advertising, tenancies, sponsorships, and interruptive formats as described above and social media where reported[2]. Display includes both desktop and mobile advertising.
- **Paid-for-search advertising:** as defined above.
- **Classifieds and directories:** includes online classifieds and online directories as defined above.
- **'Other' advertising:** an umbrella category for ad spend which could not be redistributed to the three formats above.

[2] IAB Europe and IHS Markit do not provide a standardised definition of social media advertising as there is still no consensus on this matter

APPENDICES

Appendix ii: the participating IABs

IAB Austria
www.iab-austria.at

Source: Werbeplanung.at, Marktstudie Online Werbemarkt, and IHS Markit

IAB Belarus
www.iab.by

Source: IAB Belarus

IAB Belgium
www.iab-belgium.be

Source: Mediaxim and IHS Markit

IAB Chapter in Bulgaria (Interactive Association)
www.iabbulgaria.bg

Source: IAB Bulgaria, Ipsos Bulgaria, and IHS Markit

IAB Chapter in Croatia (INAMA)
www.inama.hr

Source: Inama and IHS Markit

SPIR (Czech Republic)
www.spir.cz

Source: SPIR/IAB Czech Republic and IHS Markit

IAB Denmark
www.iabdenmark.dk

Source: Danske Medier Research

IAB Finland
www.iab.fi

Source: IAB Finland for Search, directories, Facebook display, and estimate of YouTube. TNS Media Intelligence for display, mobile and in-stream video and classifieds, and IHS Markit

IAB France
www.iiabfrance.com

Source: SRI, UDECAM and PwC, IREP for directories, and IHS Markit

IAB Chapter in Germany (OVK in the BVDW)
www.bvdw.org

Source: Online-Vermarkterkreis (OVK) im Bundesverband Digitale Wirtschaft (BVDW) e.V., and IHS Markit

IAB Greece
www.iab.gr

Source: IAB Greece and IHS Markit

IAB Hungary
www.iab.hu

Source: IAB Hungary/PwC

IAB Ireland
www.iabireland.ie

Source: IAB Ireland/PwC

IAB Italy
www.iab.it

Source: IAB Italy estimates and Osservatori Politecnico di Milano

IAB Netherlands
www.iab.nl

Source: IAB Netherlands and Deloitte Netherlands

IAB Chapter in Norway (INMA)
www.inma.no

Source: IRM, INMA, and IHS Markit

IAB Poland
www.iabpolska.pl

Source: IAB Poland/PwC

IAB Romania
www.iab-romania.ro

Source: IAB Romania/PwC and IHS Markit

APPENDICES

IAB Russia
www.iabrus.ru
Source: AKAR (Russian Association of Communication Agencies)

IAB Serbia
www.iab.rs
Source: IAB Serbia

IAB Slovakia
www.iabslovakia.sk
Source: IAB Slovakia

IAB Slovenia
www.iab.si
Source: www.iab.si

IAB Spain
www.iabspain.net
Source: IAB Spain/PwC, and IHS Markit

IAB Sweden
www.iabsverige.se
Source: IRM and IHS Markit

IAB Switzerland
www.iabswitzerland.ch
Source: Media Focus Schweiz GmbH, and IHS Markit

IAB Turkey
www.iab-turkiye.org
Source: IAB Turkey

IAB UK
www.iabuk.net
Source: IAB UK/PwC

Appendix iii: methodology and adjusted data

Each national IAB runs its own annual online advertising spend benchmark study. The method for the studies varies by market. Consequently, IHS Markit standardises the data so that the findings in the European report are comparable. This involves re-adjusting figures to allow for different original methodologies, adjusting currencies where local data is not collected in Euros and ensuring the year average exchange rate in 2016 has been used. To provide data for previous year growth rates, the prior year's figures are also re-calculated using the current report's year-average exchange rate (i.e. the 2016 exchange rate is used on the 2015 figures) in order to give an accurate depiction of each national growth rate.

Where ad spend is unavailable or incomplete, IHS Markit models the data based on public company reports, macroeconomic variables, ad spend in other media from the IHS Markit Advertising Intelligence Service, interviews with key industry players and econometric modelling, subject to the approval of the each national IAB.

Appendix iv outlines the amount of actual, estimated and adjusted data included in the 2016 AdEx Benchmark report and the adjustments that were made in each market.

APPENDICES

Appendix iv: adjustments by market

Austria

- Net data were provided for all formats by Werbeplanung. at (an Austrian consulting company) in coordination with IAB Austria
- In 2016 reporting method was changed by IAB Austria, net data were provided instead of ratecard, thus all 2015 figures were restated for like-to-like comparison
- 2015 and 2016 data grossed up as follows based on national IAB recommendations:
  - Display – 5.5% on 100% of display total
  - Social media – 15.0% on 100% of social media total
- Mobile search was estimated by IHS Markit
- Affiliate marketing and social media were added to the display total

Belarus

- Net data were provided by IAB Belarus for display, classifieds and directories, paid-for-search, and video
- Agency commissions of 9.0% were added to the 2015 and 2016 display and classifieds and directories figures to move them from net to gross

Belgium

- Net data were provided by IAB Belgium for the display, social, video and paid-for-search
- Video, social, and programmatic display added to the total display figure for 2016
- Classifieds and directories were estimated by IHS Markit based on European averages
- 2016 mobile search and mobile display were estimated by IHS Markit
- 2016 data grossed up as follows based on national IAB recommendations:
  - Display – 13.0% on 100.0% of total display
  - Mobile display – 13.% on 100.0% of total mobile display
- Search and video for 2015 were restated, because 2016 figures were not comparable with 2015 due to change of methodology by IAB Belgium

Bulgaria

- Gross data provided by IAB Bulgaria & Ipsos Bulgaria for:
  - Display advertising
  - CPC and CPA advertising
  - Video (not full market)
  - Classifieds and Directories
  - Mobile display
- 2015 figures restated due change of methodology by national IAB and incomparable to 2016
- YouTube video estimated by IHS Markit
- Search estimated by IHS Markit
- Facebook revenue estimated by IHS Markit
- CPC, CPA, YouTube, Facebook value added to total display
- Email marketing excluded

Croatia

- Gross data were provided by IAB Croatia/INAMA for display, search, and classifieds and directories
- 2015 and 2016 figures were incomparable with historical data and the European market, and were adjusted as below:
  - Search was not the full market, thus was estimated by IHS Markit for the full market
  - Mobile display was estimated by IHS Markit
  - All 2015 figures were retropolated due to change of methodology
  - 2016 display total was deducted by 50% as figure was incomparable with 2015 figure and the European market

Czech Republic

- Ratecard data were provided by SPIR and IAB Czech Republic for display, video, classifieds and directories, and mobile display
- Net data were provided by SPIR and IAB Czech Republic for paid-for-search and mobile search
- 2015 figures were retropolated based on IAB Czech Republic 2016 growth rate, as 2016 figures were incomparable to 2015 due to change of methodology
- Integrated content was added to 2016 total display figure
- 2016 discounts were applied based on IHS Markit estimates as follows to move data from ratecard to gross:

APPENDICES

- Display - 53.0% deduction for 52.3% of the total display figure
- Mobile display - 53.0% deduction for 38.8% of the total mobile display
- Video - 53.0% deduction for 37.5% of the total video mobile
- Integrated content – 53.0% deduction of the total integrated content
- Classifieds and directories - 53.0%
- Paid-for-search – 0.0%
- Mobile paid-for-search – 0.0%

Denmark

- Net data were provided by Danske Medier
- E-mail marketing was excluded and newsletter marketing was added to display
- 2016 and 2015 figures were adjusted up as follows to move data from net to gross:
  - Display – 7.0% on 60.0% of display total
  - Online video – 7.0% on 100.0% of video total
  - Paid-for-search – 7.0% on 40.0% of paid-for-search total
  - Classifieds and directories – 0.0% on 100.0% of classifieds and directories total
  - Mobile display – 7.0% on 100.0% of mobile display total

Finland

- Net data were provided by TNS Kantar for display, mobile in-stream video and classifieds
- Net data were provided by IAB Finland for paid-for-search, directories and social media
- 2016 and 2015 data were grossed up as follows based on national IAB recommendations:
  - Display – 15.0% on 100.0% of display total
  - Classifieds and directories – 15.0% on 100.0% of classifieds and directories total
  - Paid-for-search – 15.0% on 60.0% of paid-for-search total
  - Social media – 15.0% on 60.0% of the social media total
- For 2016, 81.0% of social media ad spend was moved into the mobile display figure, based on the global averages to provide a more holistic view of the mobile display ad market
- For 2015, 77.2% of social media ad spend was also moved into the mobile display figure, based on the global averages to provide a more holistic view of the mobile display ad market
- YouTube video was added to video total
- Facebook, YouTube Video and in-stream video were added to the total display

France

- Net data were provided by IAB France for display, video, paid-for-search and mobile
- Classifieds and directories figure was estimated by IHS Markit for 2015 and 2016 based on local market players' revenue
- Mobile display and mobile search for 2016 were based on IHS Markit estimate:
- Mobile display was 46% share of the total mobile ad market
- Mobile search was 54% share of the total mobile ad market
- 2015 and 2016 figures were adjusted up as follows to move data from net to gross:
  - Display – 15.0%
  - Video – 15.0%
  - Classifieds and directories – 0.0%
  - Paid-for-search- 0.0%
  - Mobile display – 15.0%
  - Mobile search – 0.0%

Germany

- Gross data provided by OVK in the BVDW for display, paid-for-search, mobile display and video
- Classifieds and directories and mobile search estimated by IHS Markit

Greece

- 2015 was restated due to new methodology by IAB Greece
- Ratecard data were provided by IAB Greece for display and video, discounted gross by IHS Markit with 50% for

APPENDICES

- 2015 and 51% for 2016. This reflects discount rate inflation
- 2015 video was not provided, and was retropolated based on 2015/2016 display growth
- IAB Greece provides data for paid-for-search going through agencies, at €4.3 million in 2016. To ensure like-for-like comparison with other European markets, an estimate of extra search ad spend that did not go through agencies in 2016 was added
- Classifieds and directories were estimated by IHS Markit at €3.6 million

Hungary

- Gross data were provided by IAB Hungary for display, paid-for-search, classifieds and directories, video, mobile display and mobile search
- E-mail marketing was excluded

Ireland

- Gross data was provided by IAB Ireland for display, video, paid-for-search, classifieds and directories, mobile display and mobile search
- E-mail marketing excluded

Italy

- Gross data were provide by IAB Italy & Osservatori Politecnico di Milano for display, classifieds and directories and paid for search
- Email marketing was excluded
- Display was reduced by 3.0% to exclude pan-European ad spend in 2015

Netherlands

- Net data were provided by IAB Netherlands and Deloitte Netherlands for display, video, classifieds and directories, paid-for-search and mobile display
- Affiliate marketing was redistributed as follows:
  - 7.0% was excluded as it was SEO
  - 93.0% was added into display category
- E-mail marketing was excluded
- 2015 and 2016 figures were adjusted up as follows to move data from net to gross:
  - Display – 15.0% on 100.0% of the display total
  - Video – 15.0% on 100.0% of the display total
  - Mobile display – 15.0% on 100.0% of the display total
- Paid-for-search and classifieds and directories were left as reported

Norway

- Gross data were provided by IRM/INMA
- Display was reduced by 10.0% to exclude transaction-oriented payments
- Mobile display, and video were added to the total display
- 2015 figures were restated
- In-stream video advertising was estimated by IHS Markit using European averages

Poland

- Gross data were provided by IAB Poland
- 2015 figures were restated
- E-mail marketing was excluded
- Unspecified spend was distributed among all categories based on each category's share of total online ad spend

Romania

- Net data were provided by IAB Romania
- Affiliate marketing, integrated content, newsletter advertising, contextual advertising and all unspecified advertising were added into the display category for 2015
- Display and video were grossed up by 5.0% based on national IAB recommendations to move data from net to gross figures for 2015 and 2016
- Romania's search and display, and mobile total figures saw a huge jump in 2016, because more agencies were added to the survey. Agencies also provided revenue they generated on international platforms within Romania
- Classifieds and directories for 2016 were estimated based on IAB Romania recommendations
- 2015 figures were restated as follow
  - Total online ad spend figure were based on IHS Markit knowledge of the advertising market
  - The shares between display, search, and classifieds and directories were based on the share of the reported figures

APPENDICES

- Video was based on the same approach, the share of video of total online ad revenue
- Total mobile revenue was based on our knowledge of the mobile ad market
- The share of mobile search, display, and messaging were based on the same split approach

Russia

- Net data were provided by IAB Russia
- 2015 figures were restated due to change of methodology by national IAB
- Classifieds and directories of 2015 was estimated based on 21% growth rate suggested by IAB Russia (2016 classifieds and directories were provided)
- Performance CPX (Non CPM based) was 30% to display and 70% to search as advised by IAB Russia, same with mobile CPX
- Mobile performance CPX (Non CPM based) was 30.0% to display and 70% to search as advised by IAB Russia, same with mobile CPX
- 2015 and 2016 figures were grossed up as follows:
  - Display – 15.0% on 100.0% of the display total
  - Classifieds and directories – 15.0% on 50.0% of the classifieds and directories
  - Paid-for-search – 15.0% on 30.0% of the search total
  - Video – 15.0% on 100.0% of the display total
  - Mobile display – 15.0% on 100.0% of the display total
  - Mobile paid-for-search – 15.0% on 30.0% of the search total

Serbia

- Gross data were provided by IAB Serbia for display, classifieds and directories and paid-for-search
- Affiliate marketing, integrated content, newsletter advertising, social marketing and mobile display were added into display

Slovakia

- Net data were provided by IAB Slovakia for display, classifieds and directories and paid-for-search
- 2015 and 2016 figures were adjusted up as follows to move data from net to gross:
  - Display – 15.0% on 70.0% on display total
  - Classifieds and directories – 15.0% on 70.0% of classifieds and directories total
  - Paid-for-search – 0.0% on 100.0% of paid-for-search total
  - Underspecified were split out to search, display, and classifieds and directories according to the share of the three categories

Slovenia

- Gross data were provided by IAB Slovenia

Spain

- Net data were provided by IAB Spain and PwC for display, paid-for-search and video
- 2016 figures were adjusted up as follows to move data from net to gross:
  - Display – 10.0% on 100.0% display total
  - Video – 10.0% on 100.0% video total
  - Paid-for-search – 0.0% on 100.0% of paid-for-search total
- Video and mobile display were added to total display
- Video were added to total display
- Mobile search was retropolated
- Classifieds and directories for 2016 was estimated by IHS Markit based on European average

Sweden

- Net data were provided by IRM (Institutet för reklam- och mediestatistik) for display, paid for search, and classifieds and directories
- Search was reduced by 10.0% to exclude SEO revenue
- Display was reduced by 10.0% to exclude transaction-oriented payments
- In-stream video advertising was estimated based on total video reported by IRM and European averages
- Mobile advertising data:
  - Mobile search was modelled based on display/search ratios
  - After mobile search was removed, the remaining mobile figure was split 50/50 for classifieds and directories and social. Social was then added into mobile display

APPENDICES

- 2016 (and 2015) figures were adjusted up as follows to move data from net to gross:
  - Display – 6.0% on 75.0% of display total
  - Video 6.0% on 100.0% of video total
  - Mobile display – 1.8% on 100.0% of mobile display total
- Classifieds and directories for 2015 were restated

Switzerland

- Ratecard data were provided by Media Focus Schweiz GmbH for display, classifieds and directories, paid-for-search, and affiliate marketing
- 2016 discounts were applied based on IHS Markit estimates as follows to move data from ratecard to gross:
  - Display rate – 55.7%
  - Affiliate marketing – 55.7%
- 2015 discounts were applied based on IHS Markit estimates as follows to move data from ratecard to gross:
  - Display rate – 55.4%
  - Affiliate marketing – 55.4%
- Display and affiliate marketing was grossed up by 15.0%
- Affiliate marketing category were moved into display

Turkey

- Net data was provided by IAB Turkey for display, classifieds and directories, paid-for-search, email marketing, in-game advertising, video, mobile display, mobile search, mobile classifieds and directories, mobile email and mobile in-game
- Email marketing was excluded from the online total
- Mobile display, video, and in-game were added to the total display
- Display for 2015 was restated
- Mobile Classifieds and directories was added to total classifieds and directories
- 2015 and 2016 figures were adjusted up as follows to move data from net to gross:
  - Display – 15.0% on 100.0% of display total
  - Video – 15.0% on the 100.0% of video total
  - Classifieds and directories – 15.0% on 100.0% of classifieds and directories total
  - Paid-for-search – 15.0% of paid-for-search total
  - Mobile display – 15.0% of mobile display total

UK

- Gross data were provided by IAB UK
- 2015 figures for all formats were restated based on like-for-like growth rates, provided by IAB UK
- Display, in-stream video, classifieds and directories and paid-for-search were kept as reported
- Email marketing and mobile messaging were excluded from the online total
- Other was calculated as the difference of the total reported and total of display, classifieds and directories and paid-for-search (this included lead-generation, social media ad spend, solus, audio)

OUR RESEARCH PARTNERS

About IHS Markit Technology, Media & Telecom's Advertising Intelligence Service

IHS Markit Advertising Intelligence Service provides its clients with a holistic and global view of a rapidly evolving advertising and marketing landscape. Developed and maintained by a team of expert analysts, it offers accurate, continuously updated market data, forecasts and reports that give our clients deep perspective on a dynamic advertising market. As the only global product that offers the same detail and scope for both established and emerging media we provide a unique, independent and objective view.

About IHS Markit (www.ihsmarkit.com)

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.

comScore is a leading cross-platform measurement company that measures audiences, brands and consumer behavior everywhere. comScore completed its merger with Rentrak Corporation in January 2016, to create the new model for a dynamic, cross-platform world. Built on precision and innovation, our data footprint combines proprietary digital, TV and movie intelligence with vast demographic details to quantify consumers' multiscreen behavior at massive scale. This approach helps media companies monetize their complete audiences and allows marketers to reach these audiences more effectively. With more than 3,200 clients and global footprint in more than 75 countries, comScore is delivering the future of measurement. Shares of comScore stock are currently traded on the OTC Market (OTC:SCOR). For more information on comScore, please visit comscore.com.

ABOUT IAB EUROPE

Our Mission

IAB Europe is the leading European-level industry association for the online advertising ecosystem. Its mission is to promote the development of this innovative sector and ensure its sustainability by shaping the regulatory environment, demonstrating the value digital advertising brings to Europe's economy, to consumers and to the market, and developing and facilitating the uptake of harmonised business practices that take account of changing user expectations and enable digital brand advertising to scale in Europe.

Our Research Strategy

IAB Europe 'proves' the value of the online advertising industry through an ongoing programme of research driven by the Research Committee. It initiates and brings together the best of research available on the consumer and the European online advertising market through its network of members, national IABs and partners. In addition to our AdEx Benchmark study IAB Europe undertakes a number of other research projects and initiatives which are outlined below.

IAB Europe encourages its members to use these assets to support investment in digital media and inform business decisions plus also to get involved in its Research Committee to shape and expand industry knowledge.

European Programmatic Market Sizing Study

The European Programmatic Market Sizing Study sizes the programmatic market at a European level. The numbers are based on ad spend reported by IABs, transactional data, statistical and econometric models to infer a European market size and knowledge from industry experts.

Library of Programmatic Case Studies

The European Programmatic Market Sizing Study sizes the programmatic market at a European level. The numbers are based on ad spend reported by IABs, transactional data, statistical and econometric models to infer a European market size and knowledge from industry experts.

Library of Ad Effectiveness Case Studies

The Library of Ad Effectiveness Case Studies showcases the opportunities, potential and success that digital offers for brand advertisers by featuring case studies that demonstrate how a brand has achieved various KPIs through a digital or cross media campaign.

Multi-Device and Connected World Library of Research

The Multi-Device and Connected World Library of Research is a library of media consumption research that has been undertaken in Europe across multiple devices that showcases the evolving consumer landscape and its potential for advertising.

Attitudes to Programmatic Advertising Survey

This annual survey provides insight on the drivers and barriers of programmatic for advertisers, agencies and publishers in Europe and the current adoption of and attitudes toward programmatic of both the buy and sell-side stakeholders.

Attitudes to Digital Video Advertising Survey

This annual survey provides insight on the current adoption of and attitudes towards digital video advertising of both the buy and sell-side of the digital advertising industry in order to help advertisers, agencies and publishers develop their digital video strategies.

Metrics and KPIs Survey

This survey provides insight into the metrics and measurements that would help drive more long-term brand advertising investment into digital media.

Global Mobile Ad Revenue Report

The Global Mobile Ad Spend Report sizes the mobile advertising market at global and regional levels. The report covers 5 regions - North America, Asia-Pacific, Europe, Middle East & Africa and Latin America – and the following mobile advertising formats are included: display, search and SMS/MMS.

ABOUT IAB EUROPE

Consumers' Online Behaviour and Willingness to Pay for Online Content Study

The project supports IAB Europe's policy advocacy on the ePrivacy Regulation proposal (repealing 'Cookie Directive' 2002/58/EC) in 2017 and 2018, testing user behaviour online, to illustrate whether or not they would be willing and/or able to pay to use each of those sites or services if they had to. Thorough understanding of user preferences in this respect is essential to further demonstrate that a subscription-only Internet, possible as a by-product of the proposed Regulation gravely constraining data processing for digital advertising purposes, would disproportionately penalise less well-off consumers and SMEs, raising important issues of equality of access to information and other services.

Contextual Economic Benefits of Online Advertising Study

The project supports IAB Europe's policy advocacy on the ePrivacy Regulation proposal (repealing 'Cookie Directive' 2002/58/EC) in 2017 and 2018, to illustrate digital advertising's economic impact and to highlight vast benefits that digital advertising provides for the European population. The project will provide data to prove that advertising has been the key economic driver of the explosive growth of freely available digital services and information.

Survey of Ad Tech Companies on the Extra Revenue Generated by Interest-Based Advertising

This project supports IAB Europe's policy advocacy on the ePrivacy Regulation proposal (repealing 'Cookie Directive' 2002/58/EC) in 2017 and 2018, to illustrate the potential negative impact for publishers of the proposed Regulation that made advertising based on user browsing behaviour more difficult or even impossible.

Our committees

IAB Europe runs the following Committees and Task Forces:

- Digital Leaders' Council

Policy Committee

- Privacy and Data Protection Task Force
- GDPR Implementation Working Group
- Digital Single Market Task Force
- Ad Blocking Task Force
- Native Advertising and Content Marketing Task Force

Brand Advertising Committee

- Quality Task Force
- Ad Blocking Task Force
- Native Advertising and Content Marketing Task Force
- Video Ad Formats Task Force
- Measurement Organisations Forum

Programmatic Trading Committee

- Transparency Working Group

Research Committee

- AdEx Benchmark Task Force

Education and Training Committee

Our Board

Made up of ten national IABs and ten corporate members, the Board represents the wide-ranging interests of the many stakeholders in the European digital marketing industry.

Chairman: Constantine Kamaras, (Vice-Chairman, Atcom S.A & Board Member IAB Greece)

Vice-Chair: Stuart Wilkinson (Head of Industry Relations EMEA, comScore)

Our Network

The IAB network represents over 90 per cent of European digital revenues and is acting as voice for the industry at National and European level.

Corporate members:

21st Century Fox, Adelphic, Adform, Adobe, Adroll, ADTECH , Adtruth, AGOF Services, AOL Advertising Europe, AppNexus, AudienceScience, BBC Advertising, CNN Turner Broadcast-

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ing, comScore Europe, Criteo, DMA Institute, eBay International, Epsilon, Expedia Inc, Facebook, FreeWheel, Gemius, GfK, Glomex, Goldbach Media, Google, GroupM, Havas Group, Improve Digital, Integral Ad Science, Krux, LiveIntent, MediaMath, Meetrics, Microsoft, Millward Brown, Moat, Nielsen Online, OMD, OpenX, Orange Advertising, PHD Omnicom, Publicitas Europe, PulsePoint, Quantcast, RadiumOne, Rocket Fuel, RTL, Rubicon Project, Schibsted, SublimeSkinz, Tapcore, Teads, TubeMogul, Turn, United Internet Media, Yahoo!

Market members:

Austria, Belarus, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom.

AND FINALLY

Special Thanks

With sincere thanks to all of the national IABs who have supported the production of this report by supplying and explaining their data to IAB Europe.

The AdEx Benchmark Task Force has created specific Working Groups on Mobile, Video and Social Media agreeing scope of the research, methods and definitions. We would like to thank the Task Force and Working Groups for their valuable input to this process and their contribution to the production of this report.

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