adex Benchmark 2018

The definitive guide to the European Digital Advertising Market

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Townsend Feehan
CEO, IAB Europe

IAB Europe's AdEx Benchmark report is the definitive guide to the state of the European digital advertising market. The report details facts and figures from across Europe including growth, digital advertising formats, trends across the rich and diverse markets and a new breakdown of social and video spend.

The 2018 report reveals that the European digital advertising market grew by 13.9% last year, the fastest growth in the sector since 2011. The market has more than doubled in size since 2012, driven largely by increasing advertising investments in social, mobile and video formats. Digital continues to be a catalyst of growth in the overall paid-media advertising market and now accounts for 45% of the total.

Now in its thirteenth year, the study covers twenty-eight markets. This year the study welcomed Ukraine as the latest market to join. In 2018, a total of twenty-one of these markets saw double-digit year-on-year growth.

Interestingly, there was continued growth in the most mature markets in line with, or above, the European average. This was the case, for example, in France (18.3%), UK (15.1%), Spain (15.1%) and Norway (14.3%) demonstrating that maturity doesn't hinder opportunity for innovation. The top three individual growth markets, however, came from the CEE region – Ukraine (26.9%), Russia (24.9%) and Belarus (23.6%).

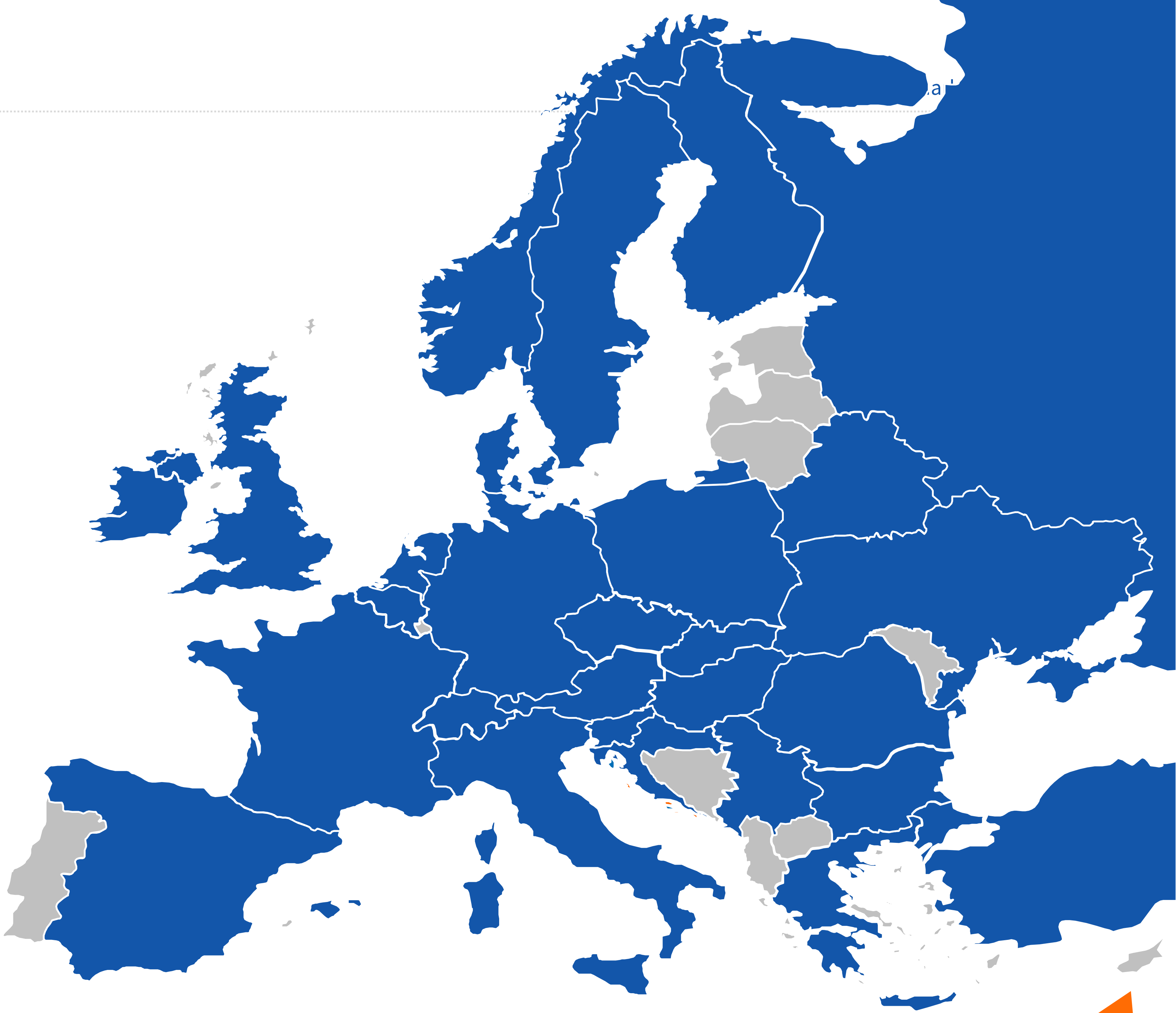
The report demonstrates that innovation continues in the industry with growth in newer digital ad formats such as out-stream surging by 44.7%.

In a time of significant change in the industry, including new data protection rules and concerns regarding transparency and accountability, the report confirms the confidence in digital advertising as an effective channel to deliver impactful and responsible advertising for brands. IAB Europe will continue to work with industry stakeholders to deliver privacy-first ad experiences that protect consumers and support Europe's digital economy via initiatives such as the Transparency and Consent Framework (TCF), The Digital Advertising Supply Chain Transparency Guide and The Effectiveness Measurement Framework.

IAB Europe looks forward to discussing and debating its findings with industry, regulatory and civil society stakeholders to continue to support growth and innovation.

Data for 28 markets in Europe

- Austria
- Belarus
- Belgium
- Bulgaria
- Czech Republic
- Croatia
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Netherlands
- Norway
- Poland
- Russia
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- UK
- Ukraine*



*new addition

Section 1

The Big Picture

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Gross Digital aAdvertising expenditure* in Europe totalled €55.1 billion in 2018, up 13.9% from €48.4 billion in 2017. Growth slightly accelerated compared to previous years and is the highest growth rate since 2011. Between inception of the AdEx Benchmark study in 2006 and 2018, the market added €48.5bn in annual value.

Growth rates have been stable since 2012 despite major structural changes in the market – from the proliferation of programmatic, social, mobile and video, to an increased presence of large platforms. The maximum variation in growth rates between 2012 and 2018 is 2.4 percentage points.

FIGURE 1 ▷ Total Digital Ad Spend (€bn)

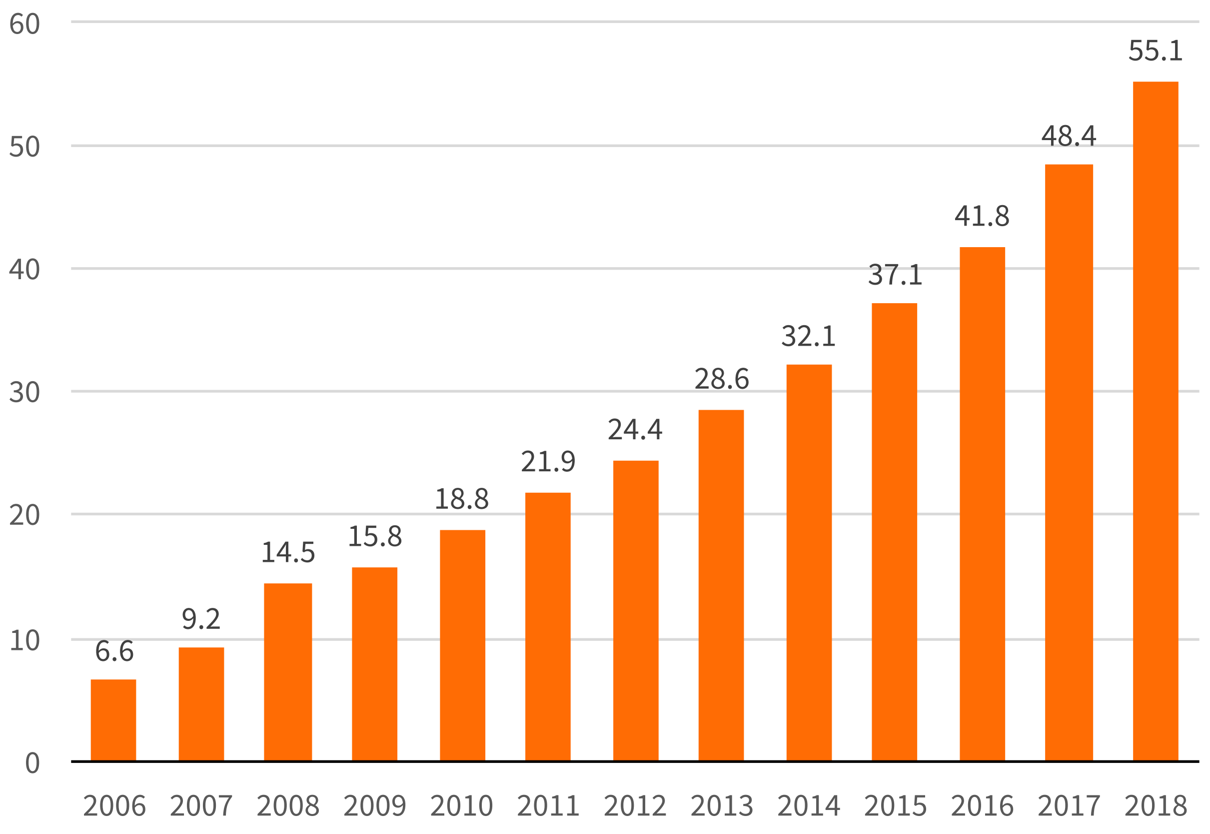
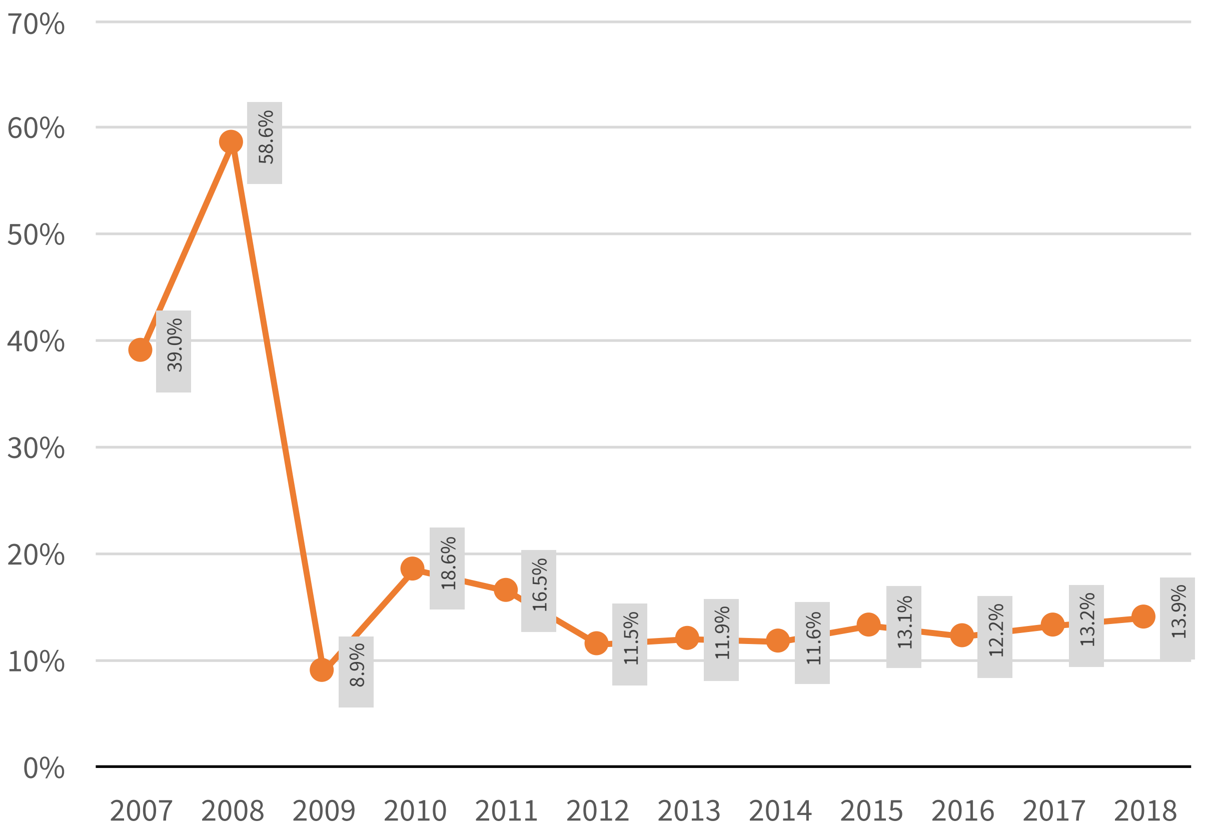


FIGURE 2 ▷ Total Digital Ad Spend Growth



** Hereafter: 'Digital Ad Spend'. Gross refers to Ad Spend after the deduction of rebates, before the deduction of agency fees.*

FIGURE 3 ▷ All-Media Ad Spend (€bn)

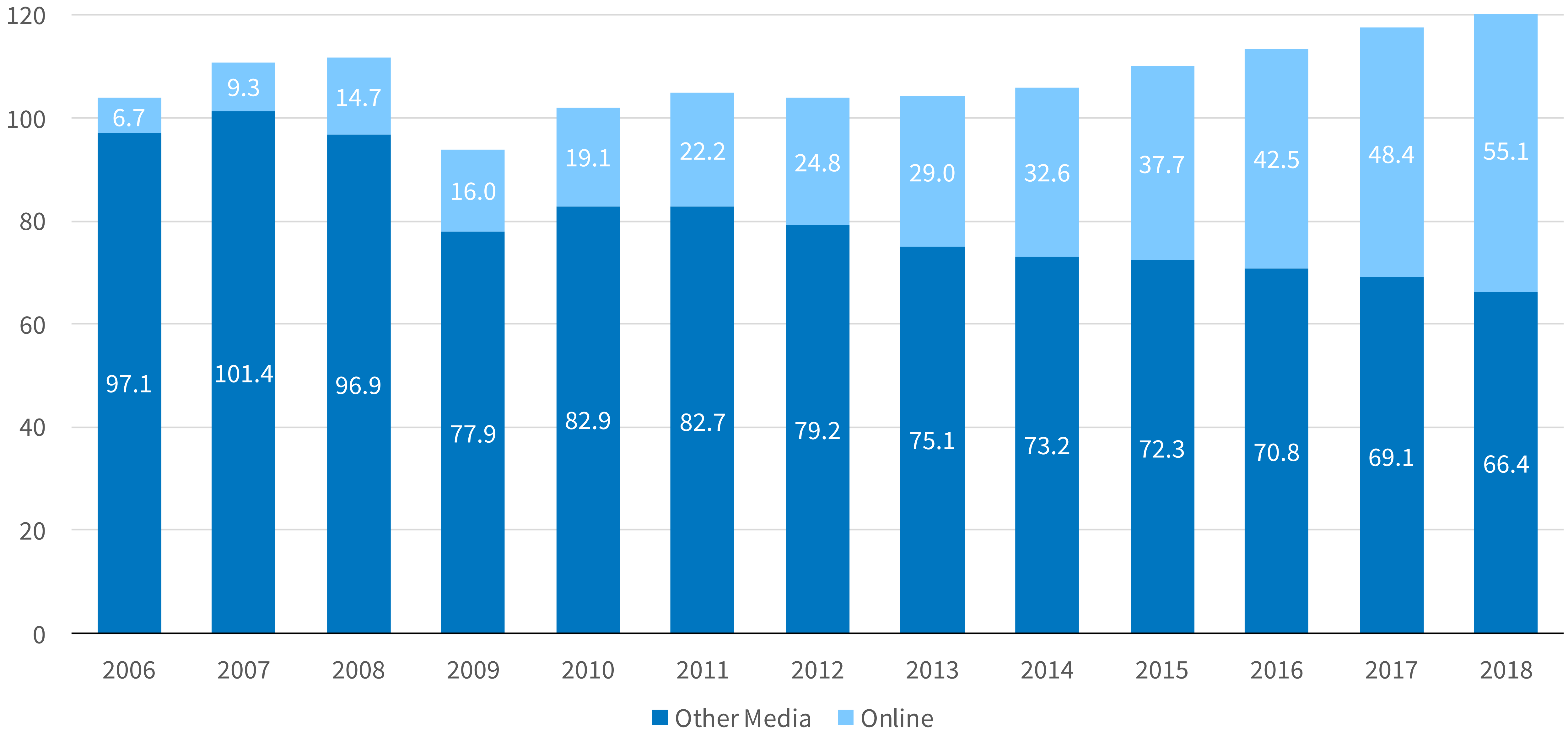


FIGURE 4 Timeline: Key Events for Digital Advertising in Europe

2006
Digital ad market worth €6.7bn, €30bn less than the €30bn TV advertising market

2007
Growth mainly came from France, Germany and the UK, then early-adopter markets.

2008
Explosive digital advertising market growth fueled by emerging markets

2009
Recession caused a slowdown to single-digit growth. Digital was the only medium in Europe to not decline due to its ability to measure and pay by performance.

2010
Market recovery post-recession driven by display advertising as brand advertising spend picked up again.

2011
Double-digit growth of the previous year persisted as other media were barely rebounding after the recession.

2012
The next advertising recession hits Europe but digital continued to grow double-digit.

2013
Mobile gets serious: for the first time, mobile accounted for a double-digit (11.8%) share of digital spend.

2014
All 27 markets in this study recorded growth, but in a wide range between +2.3% (Romania) and +43.1% (Slovenia).

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

2016
Digital spend exceeded €40bn, compensating for slowdown in other media.

2017
Display growth is driven by social, mobile, and video.

2018
New all-media market high and continued double-digit growth in a more complex regulatory environment.

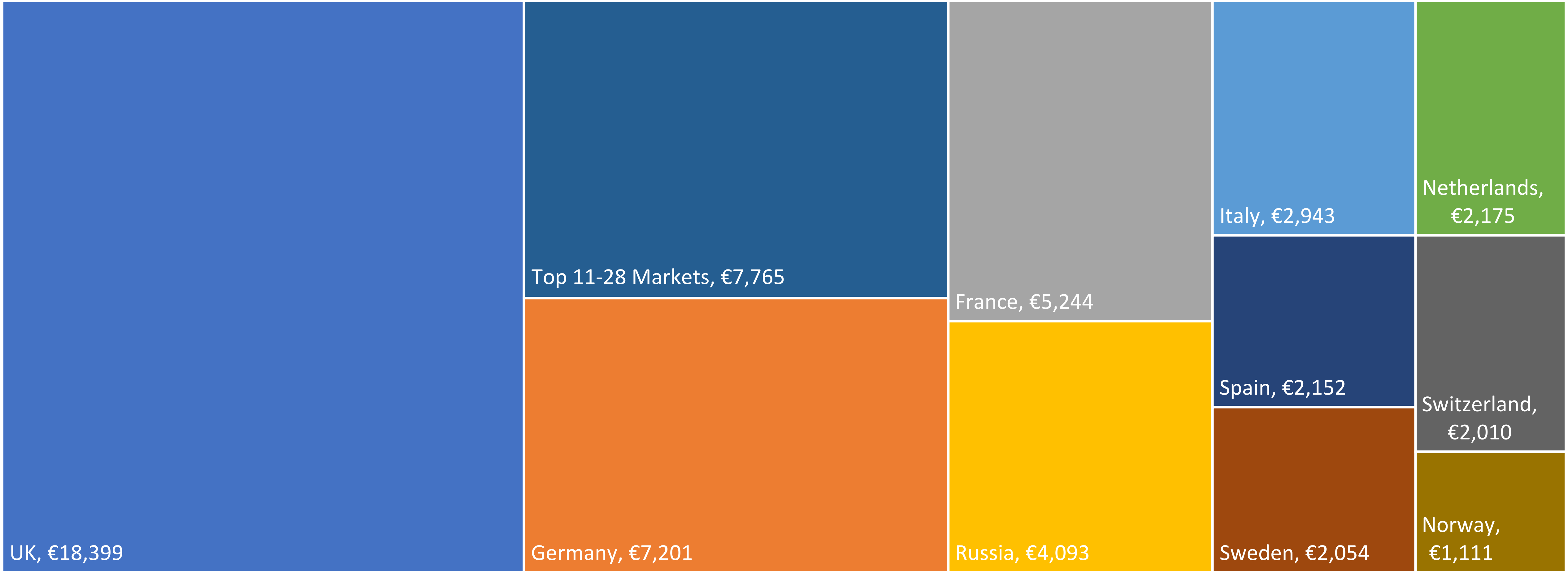
Dominic Grainger
CEO, Europe, Middle East & Africa
GroupM

Much of the growth in digital has been driven by the growing numbers of distinct advertisers whose spending is skewed towards digital advertising and Europe appears to be driving the industry forward in the way data is used by sellers of digital advertising. While we are sceptical that significant amounts of ad spending will shift into media from non-media sources (such as trade promotion budgets directed to e-commerce platforms), given the silos that exist within large marketers, new sources of spending could still emerge.

Europe is leading the way in policy and regulation, probably setting the benchmark for a global standardised approach, as we have already seen from GDPR. It's also trailblazing ahead of the US in the development of e-commerce and other new and innovative digital advertising channels. This, combined with the strong growth in digital advertising already seen and expected, puts Europe at the heart of the digital revolution. It's an exciting time to be an advertiser in Europe – there are many new opportunities to thrive.

- **10 out of 27 markets** have recorded Digital Ad Spend in excess of €1 billion in 2017.
- **The top 3 markets** had a 57.5% share of total European Digital Ad Spend, and the top 10 markets controlled 86.8% of total spend.
- The **UK's 2017** gains (€1,895) are larger than the market size of 22 of the 27 markets

FIGURE 5 ▷ Digital Ad Spend by Market (€m)



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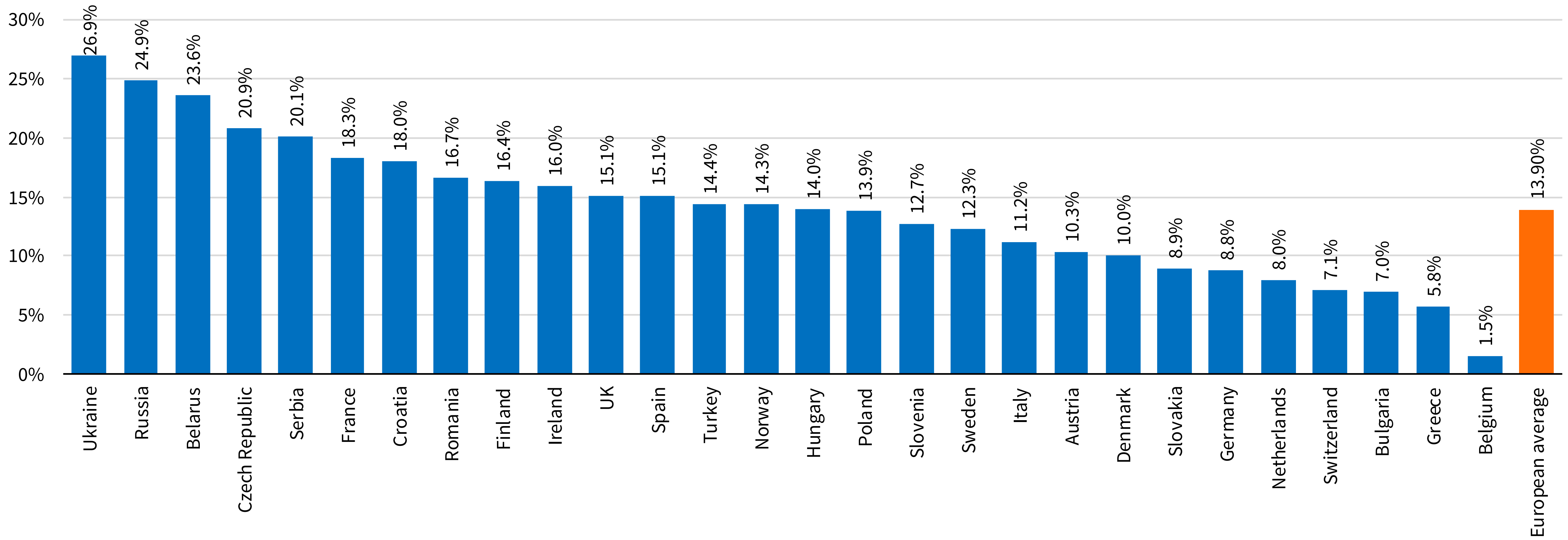
- **21 out of 27 markets** recorded double-digit growth in 2018.
- **15 markets** grew faster than the European average.
- **The top 5 fastest growing markets** were in Central and Eastern Europe (CEE).
- **Mature markets** like the Netherlands and Germany grew below the European average.

FIGURE 6 ▷ Digital Ad Spend Growth by Market in 2018



Aygen Tezcan
General Manager,
IAB Turkey

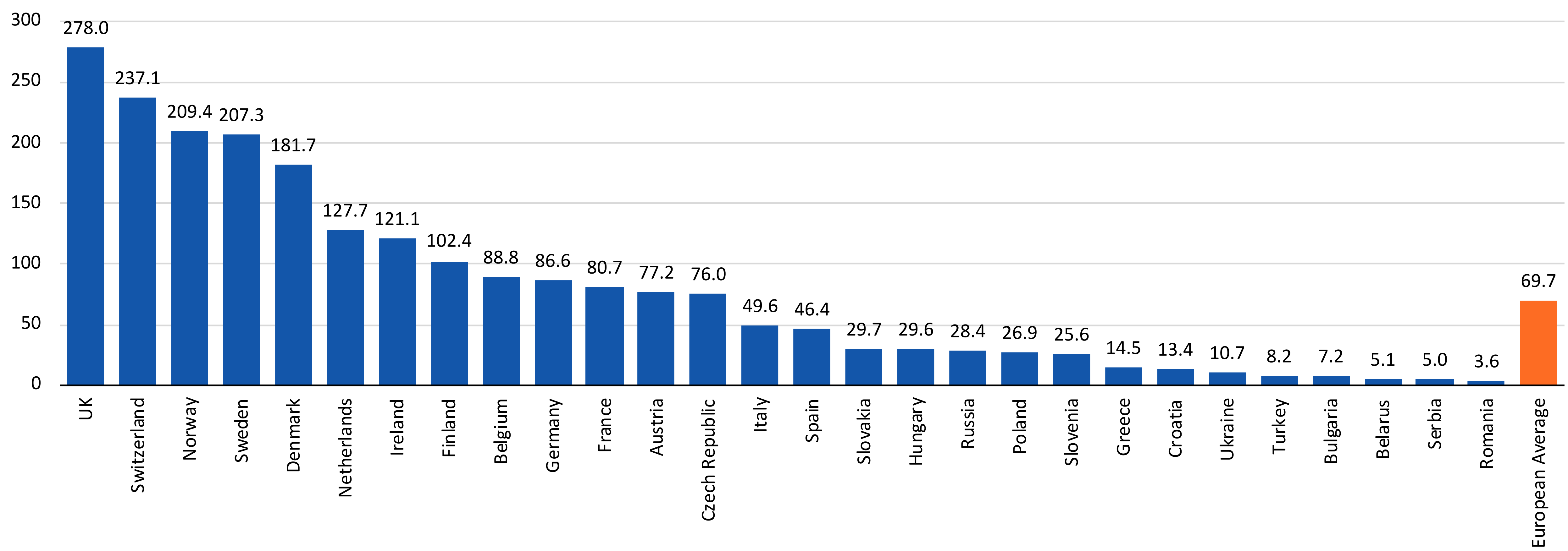
The digital advertising industry is always evolving, new technologies change business practices day by day. The report shows that in 2018, the industry experienced the fastest growth rate since 2011 reflecting the ability of the industry to adapt to big changes such as the implementation of GDPR. As it might be expected the CEE countries having growth rates far above the European average are in a position to attract more attention in terms of investment and proves the ability of unstoppable rise of digital advertising no matter the size of the market.

Matt White
Vice President EMEA
Quantcast

The growth in digital advertising recorded in Europe 2018 despite fundamental changes in the data protection landscape can be partially attributed to the important work by IAB Europe and key players in the ad tech field: they created and implemented the Transparency and Consent Framework, which has proven a solid foundation for compliance with the GDPR. The increasing adoption of CMPs by publishers and marketers has already resulted in a drastic shift toward a better, more transparent, accountable, and trustworthy online advertising industry. It is important that we build on these achievements to set ourselves up for further growth, especially with new privacy legislation being enacted across the globe.

- **Marketers spent €69.7 per person** (or capita) on digital advertising in Europe in 2018, up from €64.4 in 2017.
- **Digital advertising spend per capita** is a 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. Using Eurostat population data, digital ad spend per capita provides a normalised basis to compare advertising markets. It highlights the maturity of an online market irrespective of its size or absolute spend.

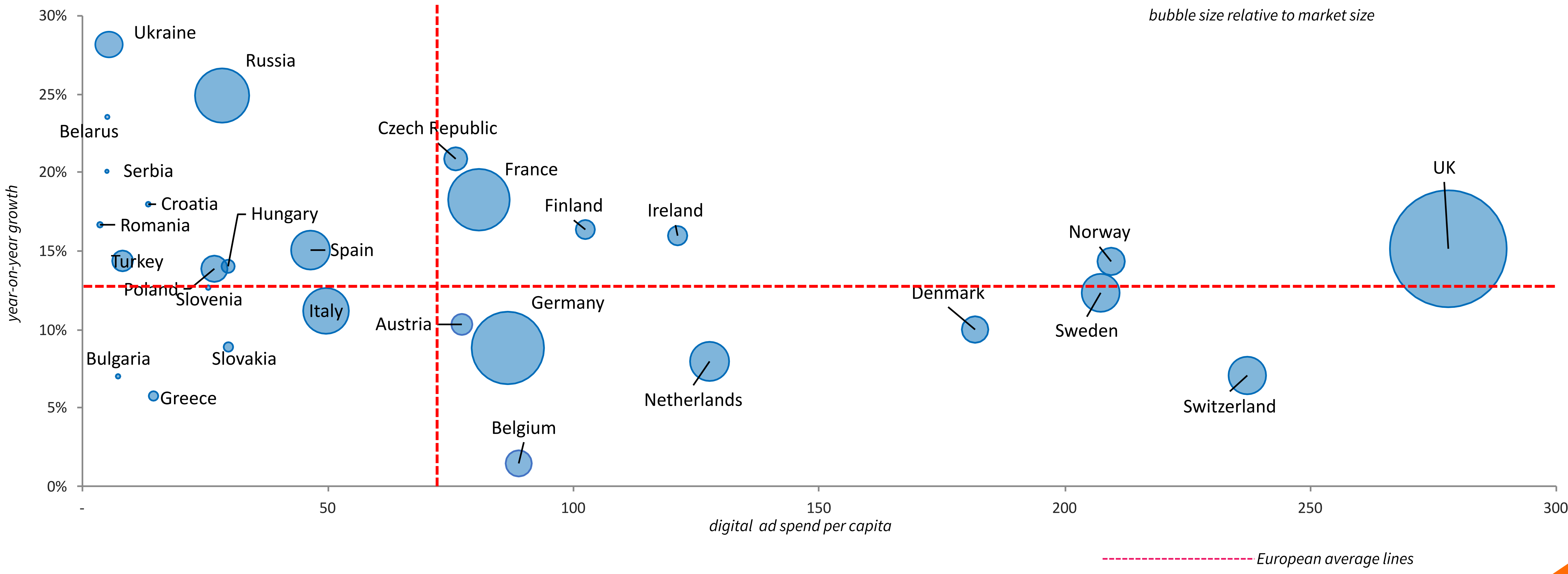
FIGURE 7 ▷ Digital Ad Spend per Capita



The chart below combines digital ad spend per capita, year-on-year growth and market size into one perspective. It reveals a number of market dynamics:

- **The most mature markets** are UK, the Nordics and Switzerland. They form a separate cluster disconnected from the rest of Europe. Despite their maturity, UK and Norway are still growing above average.
- **A large group of Western European markets** forms a cluster of below average growth.
- **Low maturity, high-growth markets** are in Central and Eastern Europe, with the notable exception of Spain which is growing above average and has below-average ad spend per capita.

FIGURE 8 ▷ Digital Advertising Market 2018 Comparison: Size, Growth, Maturity



Section 2

Formats

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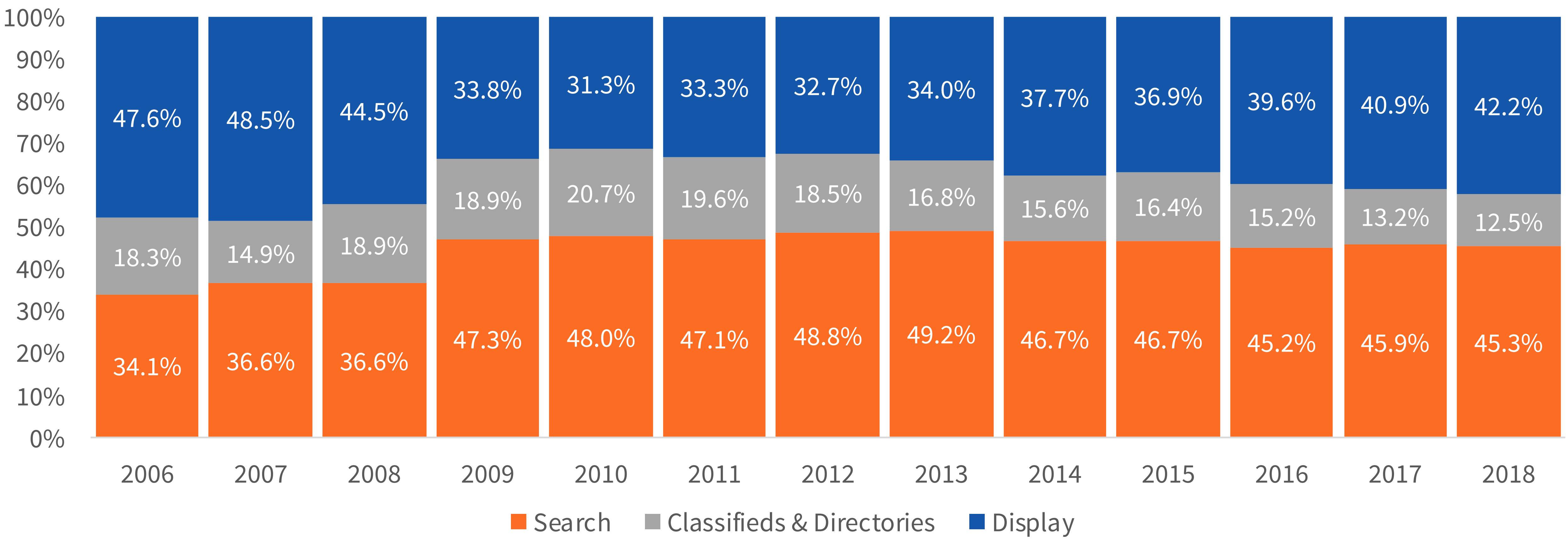
- **Display** recorded market share gains in 2018 at the expense of Classifieds & Directories and Paid-for Search.
- **The market share of Classifieds & Directories** has been in decline since 2010.
- **Display recorded a share gain** in 2018 of 1.3 percentage points, recording its highest share since 2008.

FIGURE 9 ▷ Share of Digital Advertising Spend by Format



- **Display** showed the strongest growth in 2018. The display figure includes video and social.
- **Paid-for Search** growth was driven by higher volume and prices in mobile search.
- **Classifieds & Directories** were lagging in growth, mainly because classified & directory sites increasingly monetise via display.
- **€6.7 billion** were added to the digital advertising market in Europe in 2018 in total.
- **Display** had the highest additions due to its high growth rate, despite a lower share of the market than search.
- **Video, mobile and social** were the main contributors within display.

FIGURE 10 ▷ Digital Ad Spend by Format (€m)

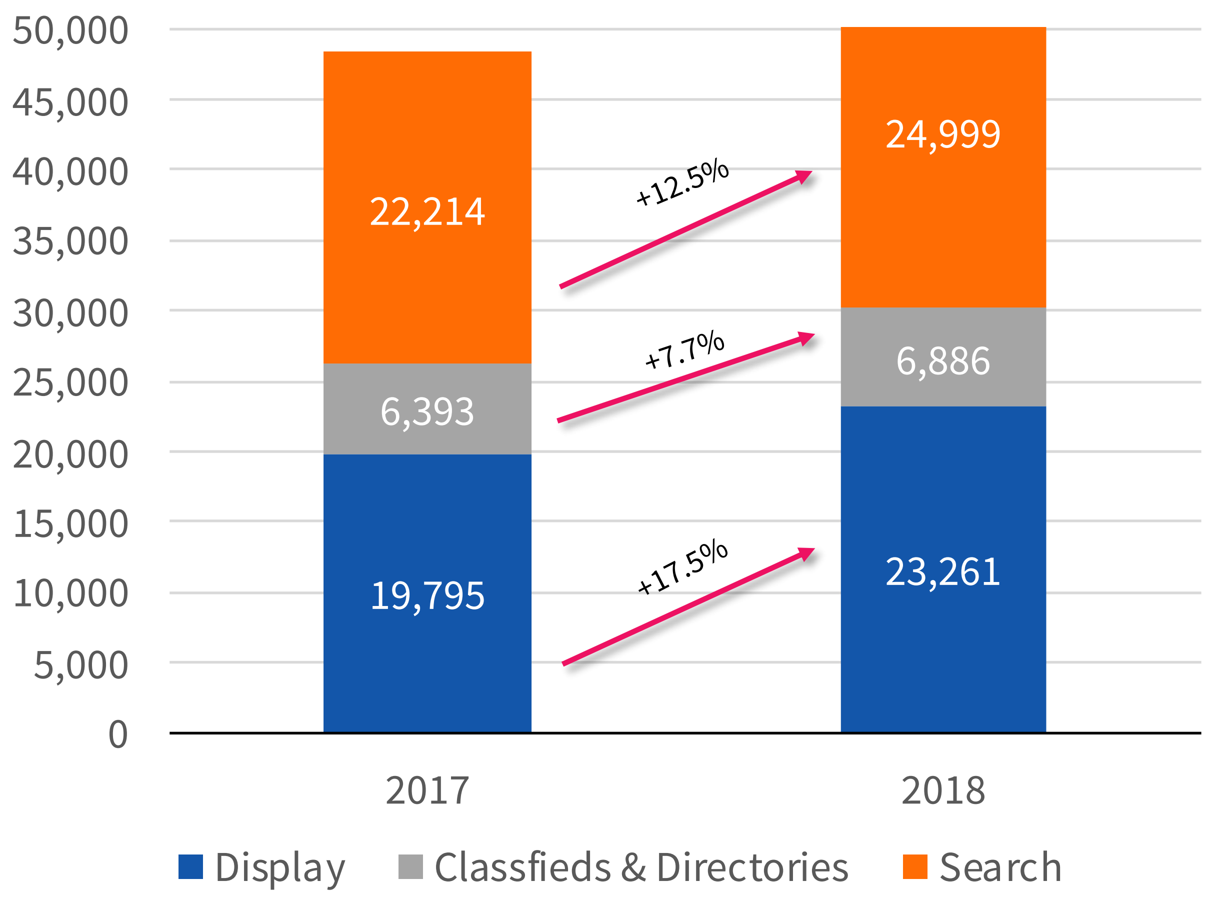
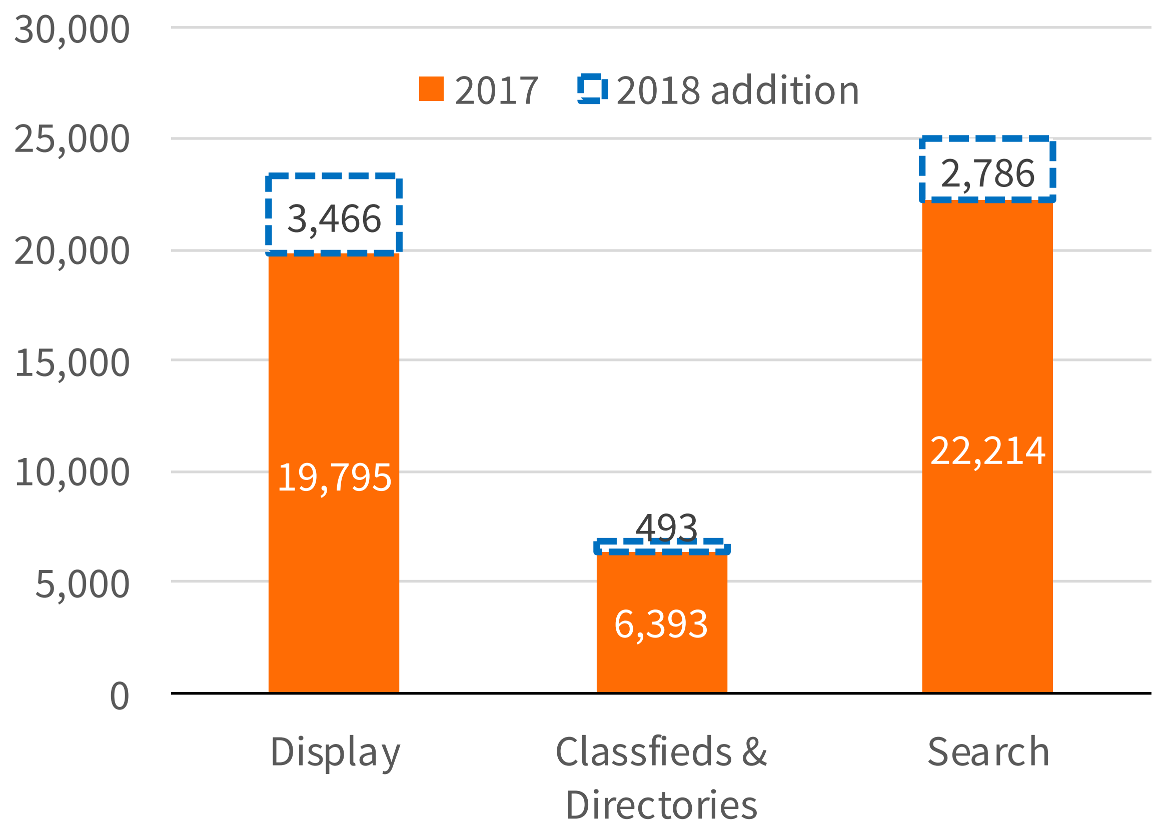


FIGURE 11 ▷ Net Additions by Format in 2018 (€m)



- **Video spend in this study** includes in-stream, out-stream and in-feed advertising.
- **Video** grew its share to 13.9% in 2018, up from 12.1% in 2017.
- **Non-Display Video** market share declined, from 28.8% in 2017 to 28.3% in 2018.
- **Total Display**, helped by video, gained 1.3 percentage points of share.

FIGURE 12 ▷ Share of Formats incl. Video in 2017

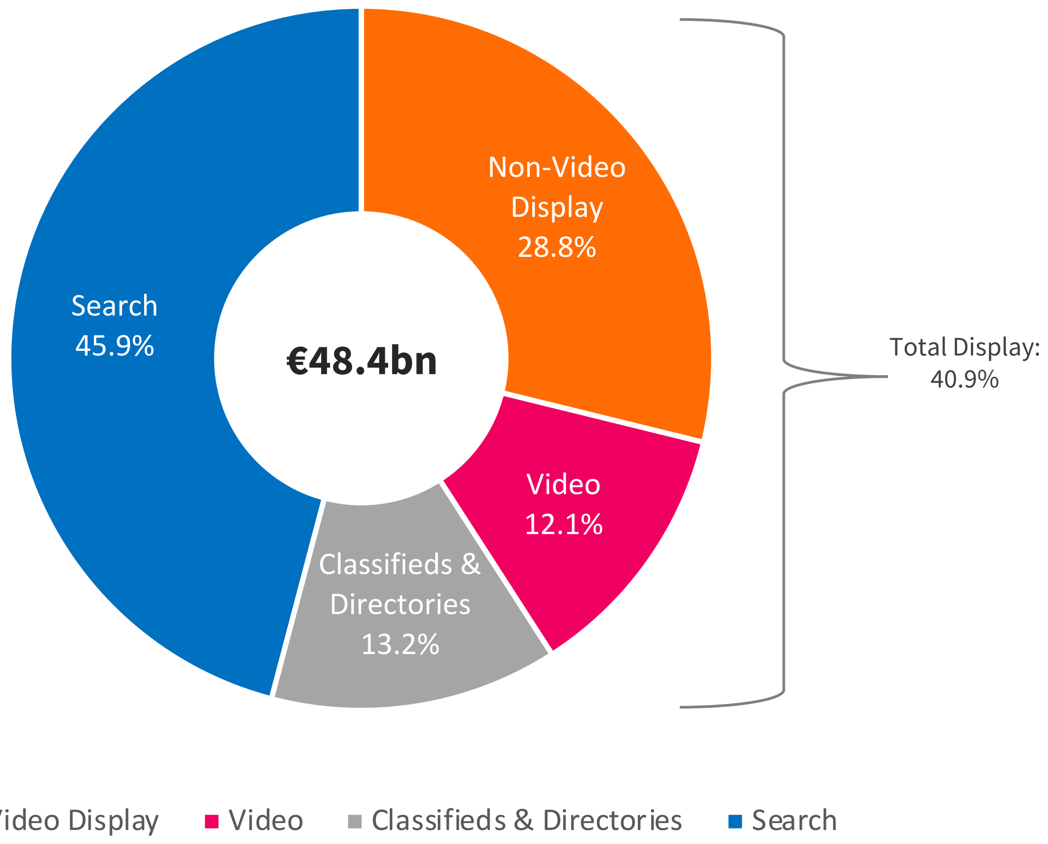
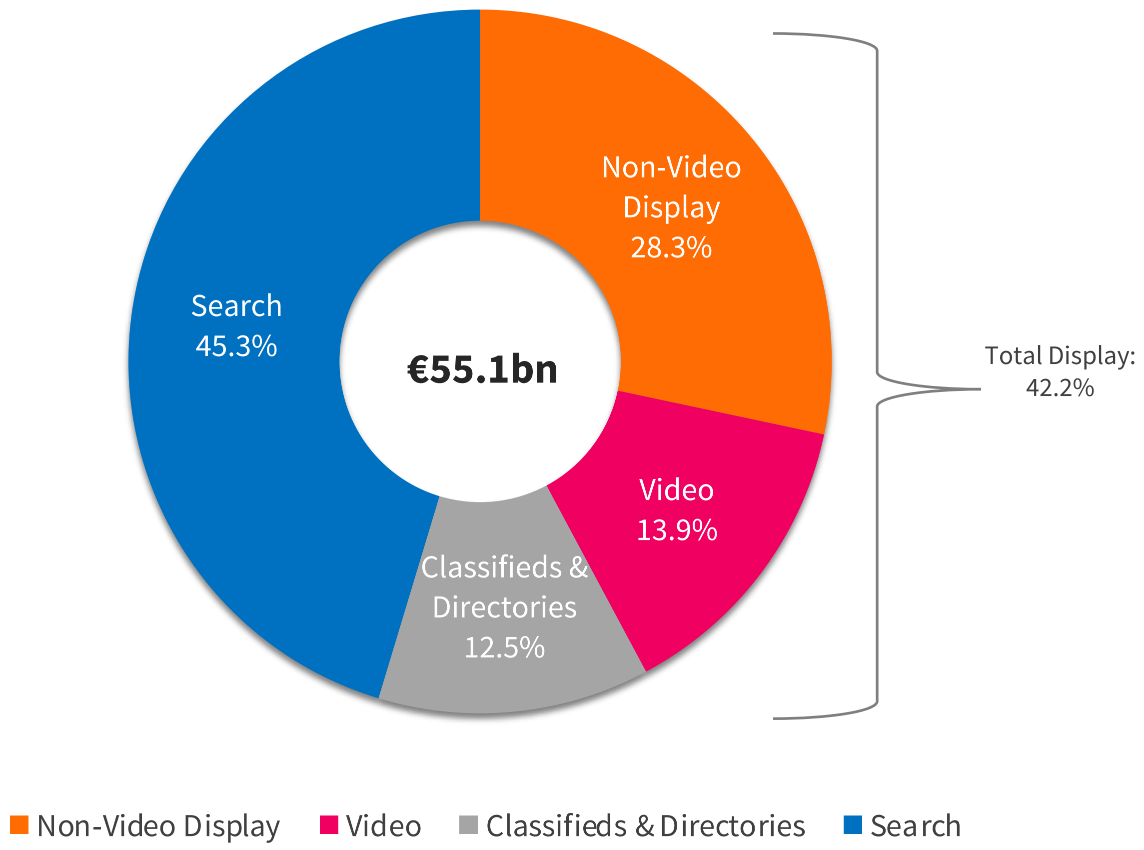
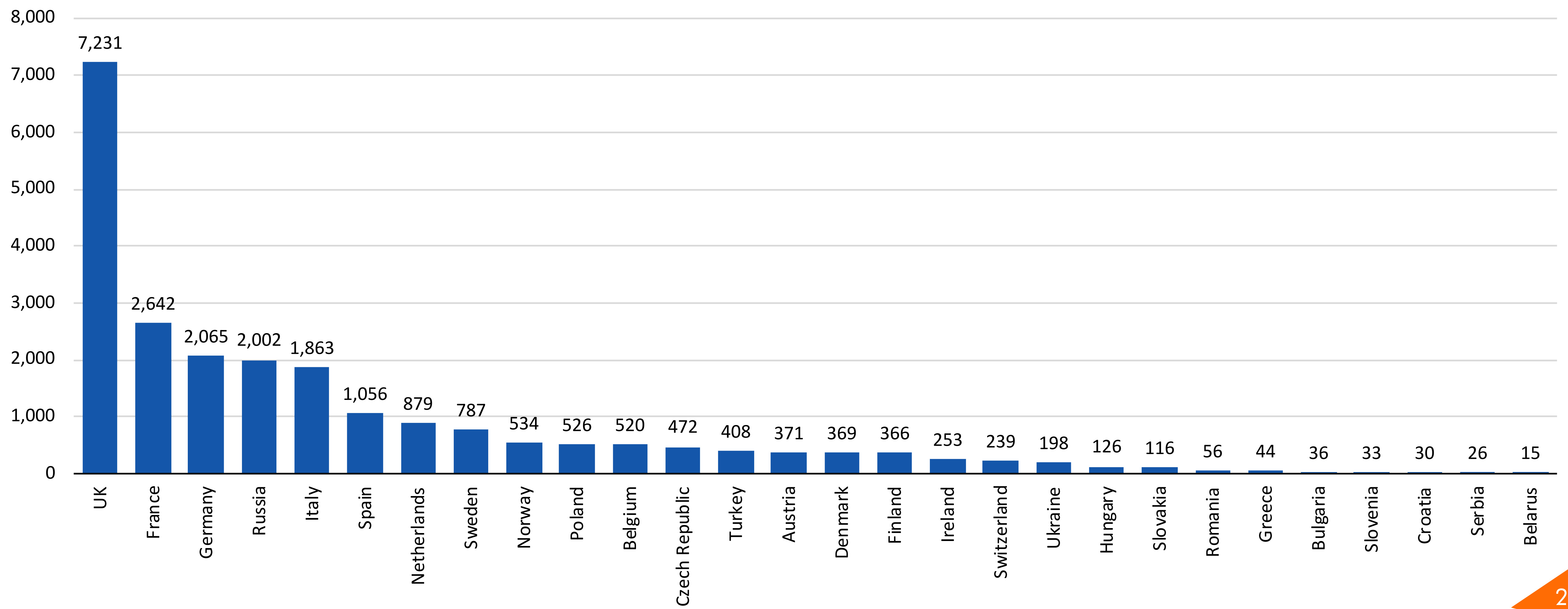


FIGURE 13 ▷ Share of Formats incl. Video in 2018



- **UK leads** far ahead of other markets., followed by France.
- **Poland and Russia** are the two CEE markets in the top 10 display markets. Russia and Germany are on par in terms of size.
- **Six display markets** exceed €1bn.

FIGURE 14 Digital Display Ad Spend by Market in 2018 (€m)



Pierre Gauthier
Board Member at IAB Europe & France, International Director at Mediakeys

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The AdEx Benchmark report provides us with key insights in the digital advertising industry in Europe. The 2018 report emphasises the growth of Eastern Europe countries (Ukraine & Russia notably) and the maturity of the UK market. In the meantime, France is in the top 3 in terms of digital display growth with a 27% growth rate which shows the dynamism of our economy and notably programmatic advertising. At IAB France, we support the AdEx Benchmark study as a benchmark of the key trends and insights in Europe.

- **Digital Video Ad Spend** was worth €7.6billion in 2018, compared to €5.8 billion in 2017.
- **Display growth was concentrated on vVdeo** in 2018. Video grew by 30.9% in 2018, nearly 3x faster than the rest of the display category.
- **Video now commands one third (32.8%)** of total Display in Europe.
- **Key drivers behind the growth of video** are the increase of inventory in particular from social platforms, programmatic video, and a growing influx of brand advertising spend.

FIGURE 15 ▷ Display Ad Spend by Format (€bn)

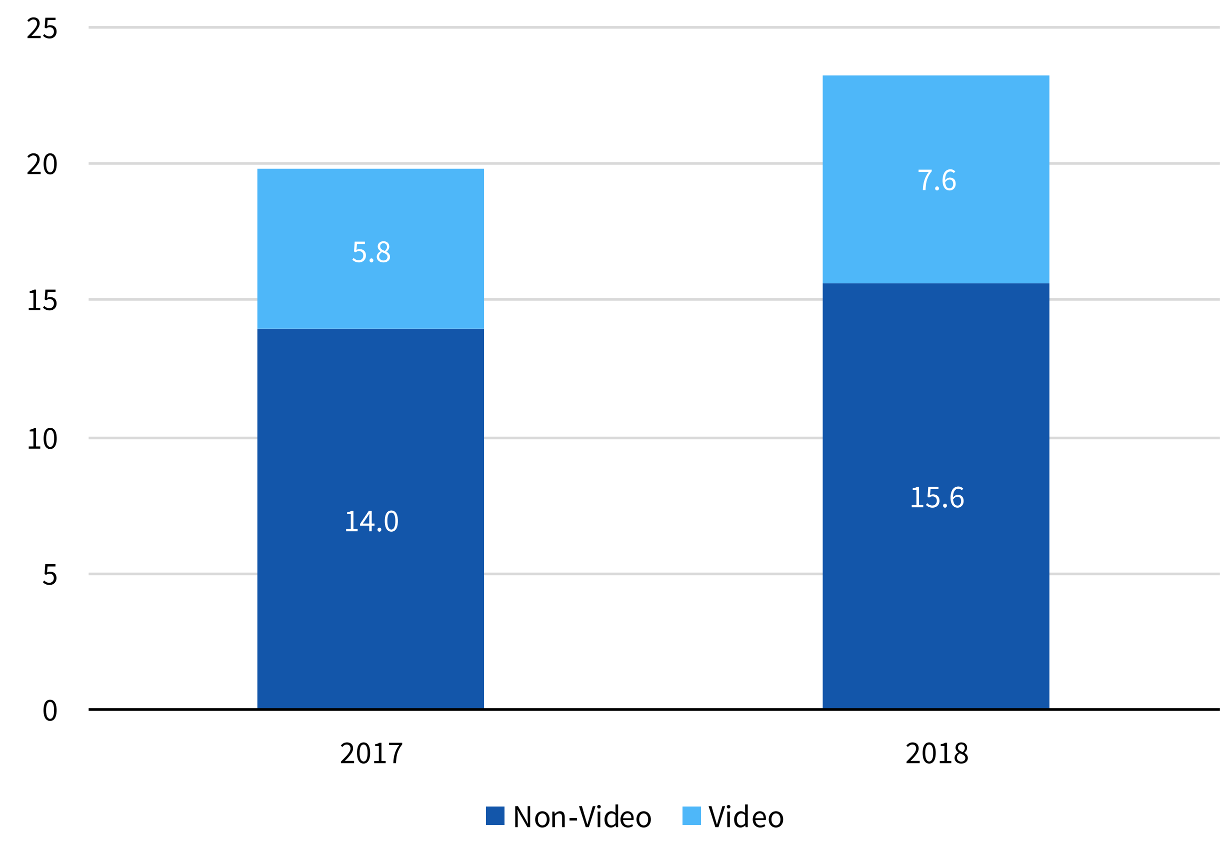


FIGURE 16 ▷ Share of Display Ad Spend Total

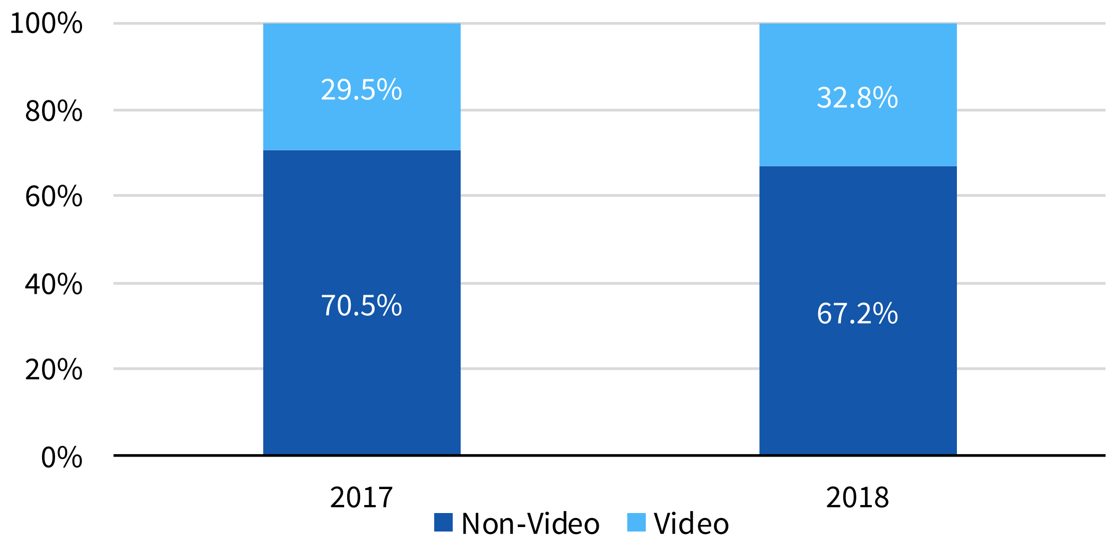
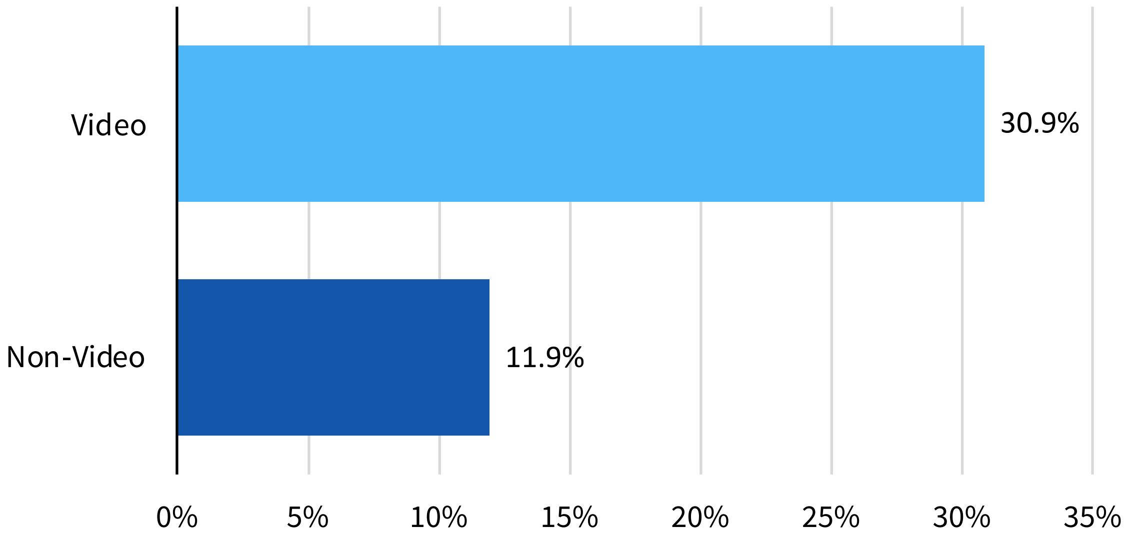


FIGURE 17 ▷ Display Ad Spend Growth by Format



- **Out-Stream is nearly on par with In-Stream.** This is due to a strong jump in Out-Stream spend in 2016 and 2017. We changed our method for determining Out-Stream spend, so data in this report is not comparable with data from previous reports.
- **Out-Stream grew 2.3x** faster than In-Stream in 2018.
- **The surge of Out-Stream continued to be driven** by Social Video, Mobile Video, and text-based publishers finding ways to monetise non-video content through video advertising.

FIGURE 18 ▷ In-Stream and Out-Stream Share of Digital Video Ad Spend

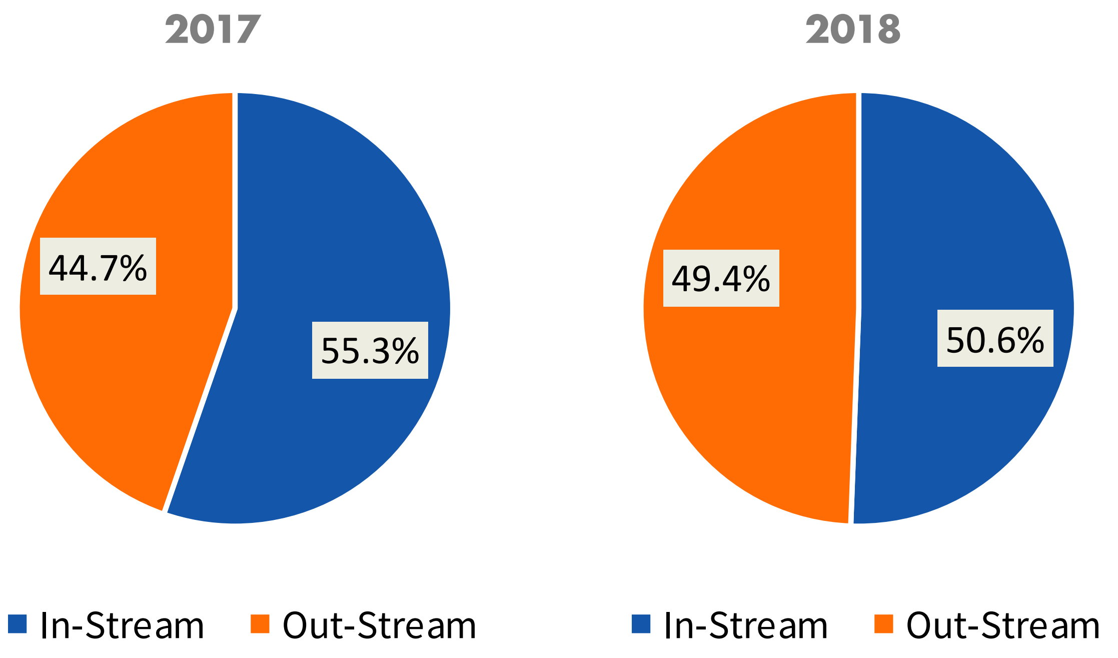


FIGURE 19 ▷ In-Stream vs Out-Stream Video Ad Spend Growth in 2018

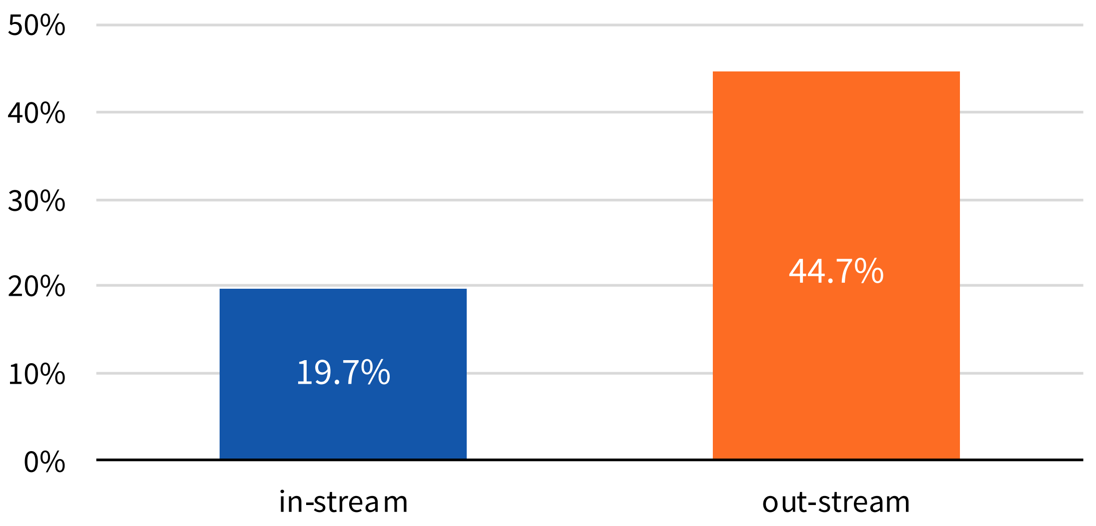
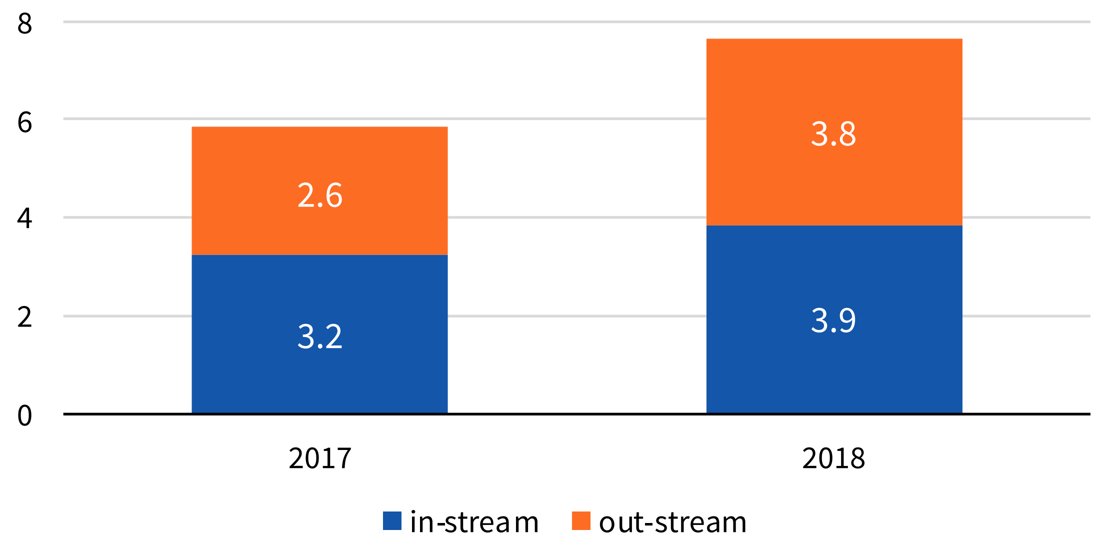


FIGURE 20 ▷ In-Stream vs Out-Stream Video Ad Spend (€bn)



- **Western European markets** dominate digital video ad spend, with the notable exception of Russia which ranks fifth in overall video market size. Despite the fact that the display market is smaller thanGermany, Italy is ahead in terms of total video ad spend.
- **For share of Display** (i.e. maturity), some CEE markets outperform Western markets.
- **Growth leaders** are mostly emerging markets with the exception of France.

FIGURE 21 ▷ Digital Video Ad Spend Growth 2018 by Market

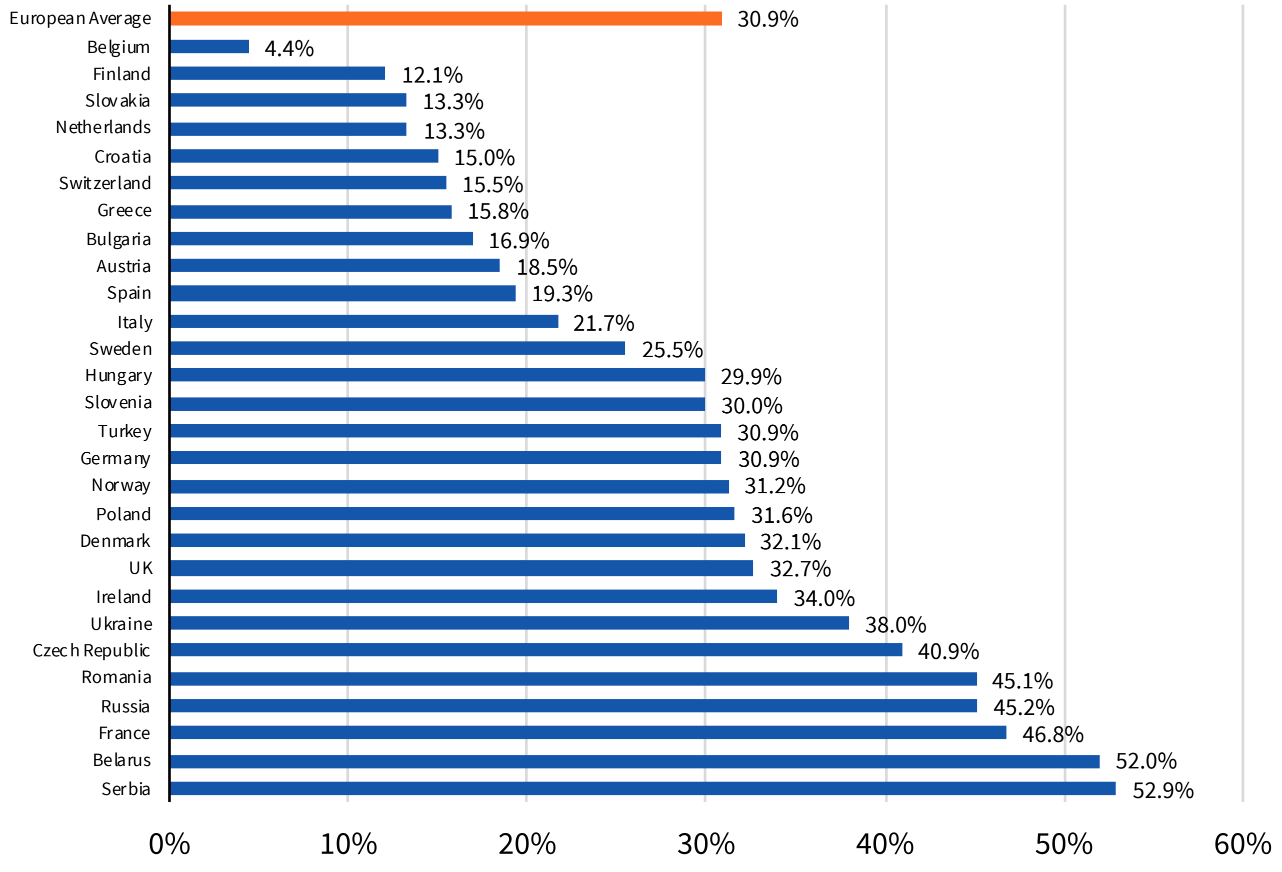


FIGURE 22 ▷ Digital Video Share of Display Ad Spend by Market in 2018

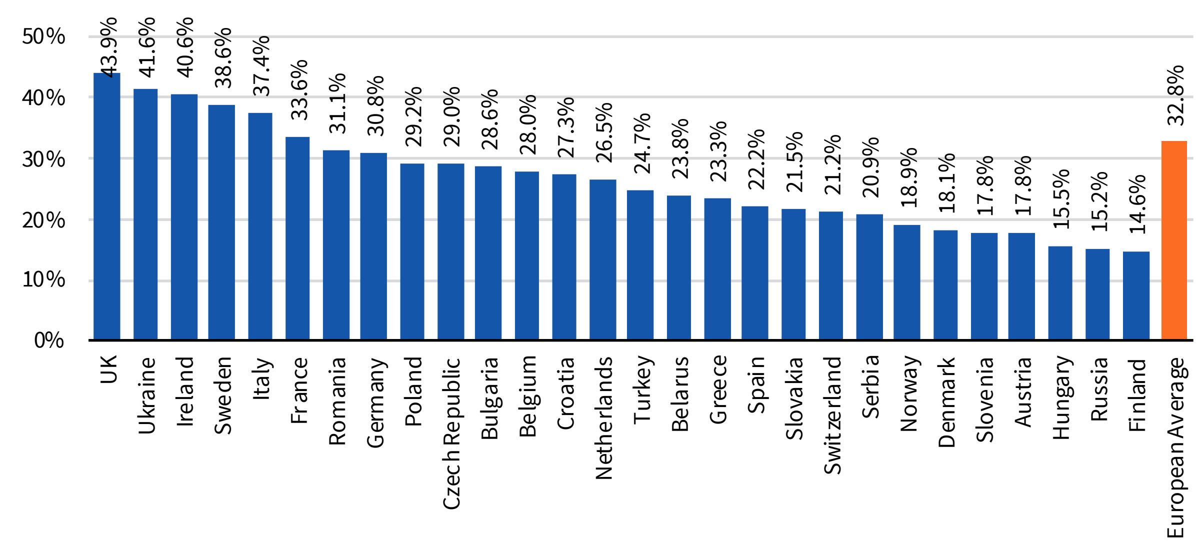
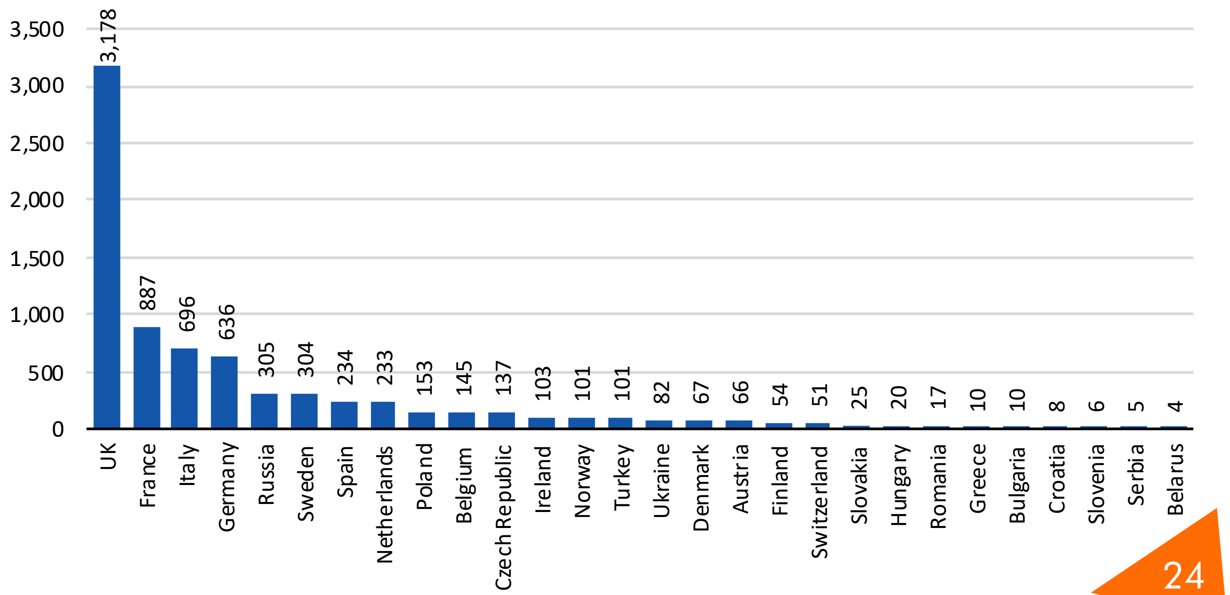


FIGURE 23 ▷ Digital Video Ad Spend by Market in 2018 (€m)



- **Social commanded nearly half of all Display revenues (49.5%) in 2018.** The 'social' category includes all ad spend on social networks. It excludes YouTube. We revised the method for determining social spend this year following better standardisation across national IABs, so data presented is not comparable to previous studies.
- **Social was a pivotal growth driver for Display in 2018.** Without the addition of social, the market would have grown by 5.1%,
- **Social increased its share of total Display** by 6 percentage points in 2018.

FIGURE 24 Social Share of Display

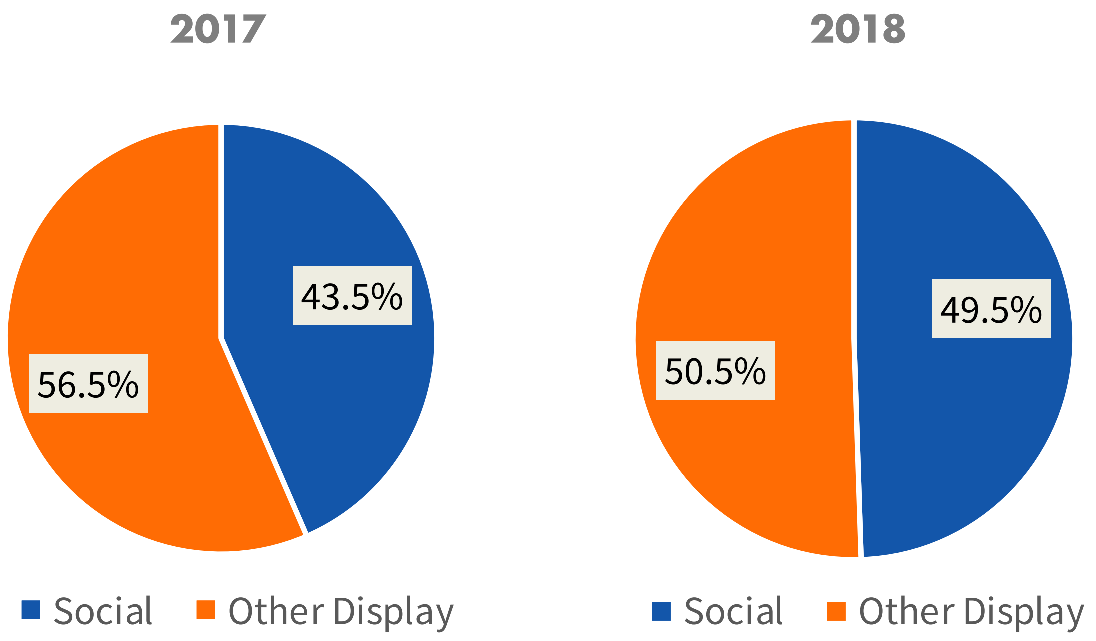


FIGURE 25 ▷ Social vs Other Display Ad Spend Growth in 2018

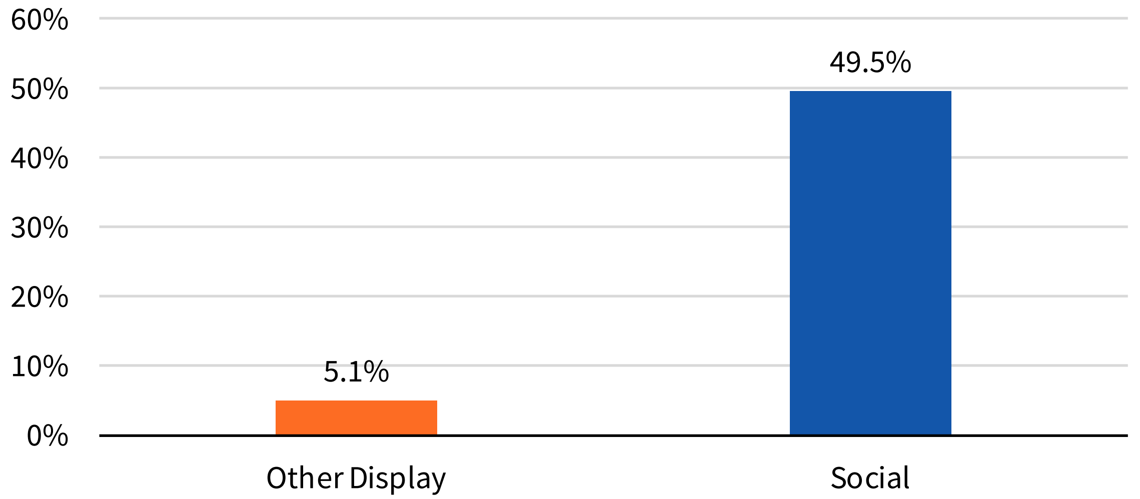
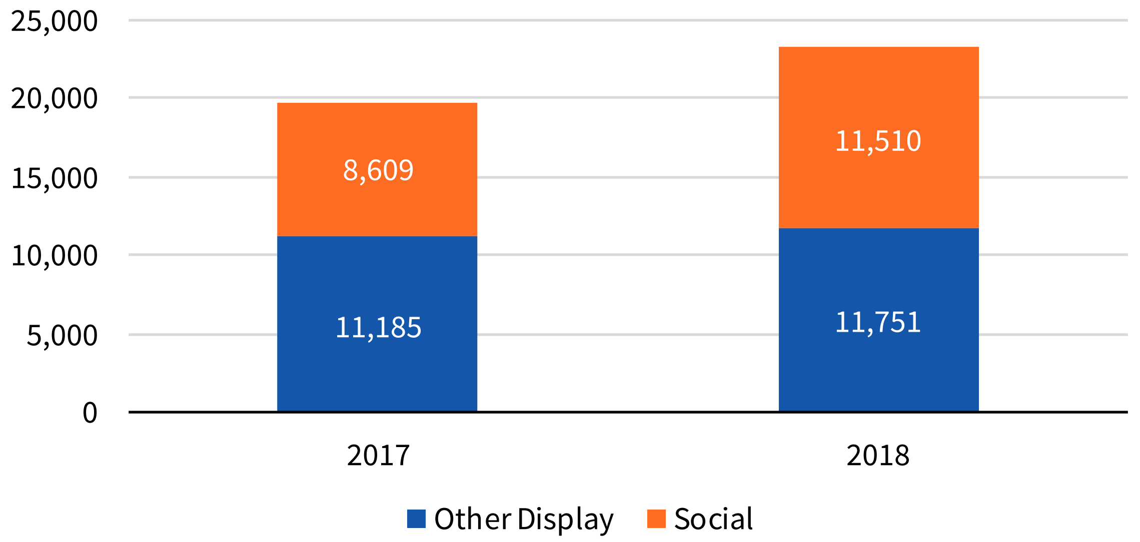


FIGURE 26 ▷ Social vs Other Display Ad Spend (€m) 2017 vs 2018



- **Mobile Display grew by 34.2%** in 2018 to €11.4 billion.
- **With a 48.9% share of Display and strong growth,** Mobile is a key factor in the overall growth of Display.
- **The rise of Mobile Display highlights** that apart from a few exceptions for high-value brand advertising, there is hardly any growth in the desktop Display category.
- **Key drivers of Mobile Display in 2018** were the continued proliferation of Social, better targeting options, rising ad prices and more optimised mobile pages from publishers, as well as ad campaigns geared to drive app installs. In particular gaming apps were a key segment for mobile display with large gains recorded by app developers.

FIGURE 27 Mobile & Desktop Share of Display 2017 vs 2018

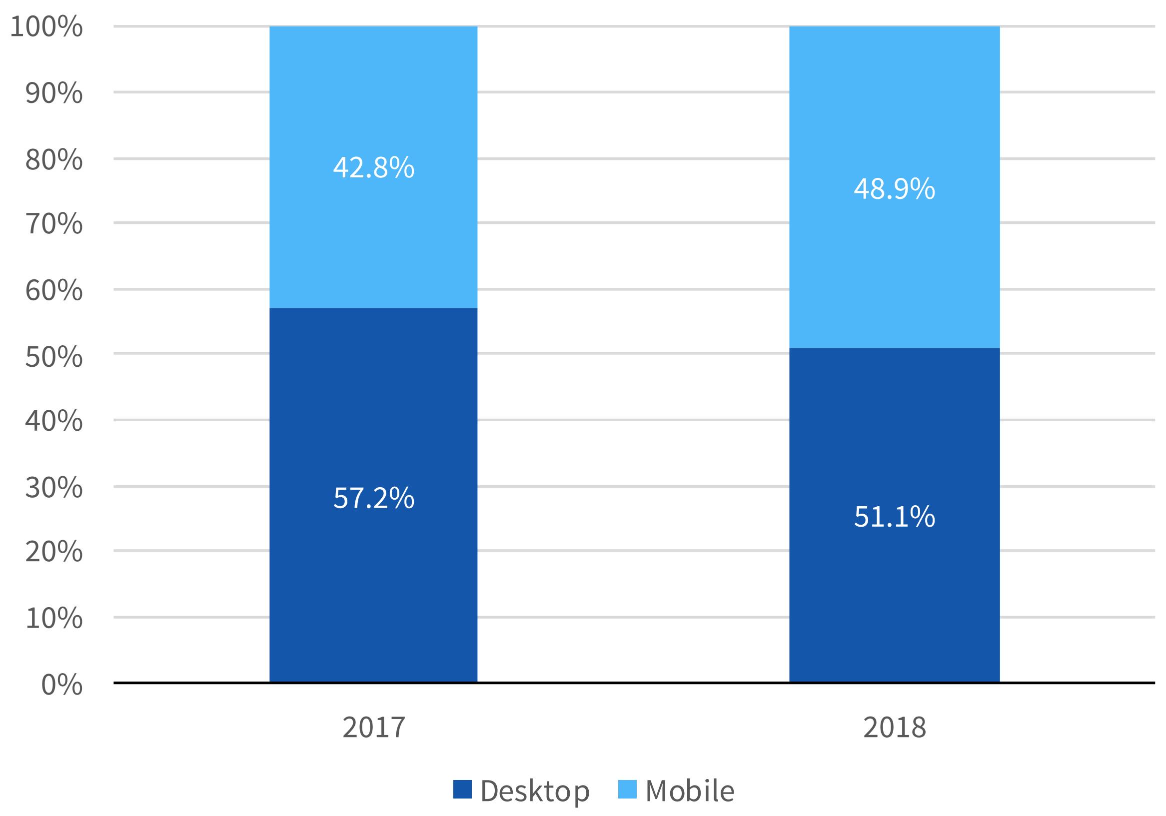
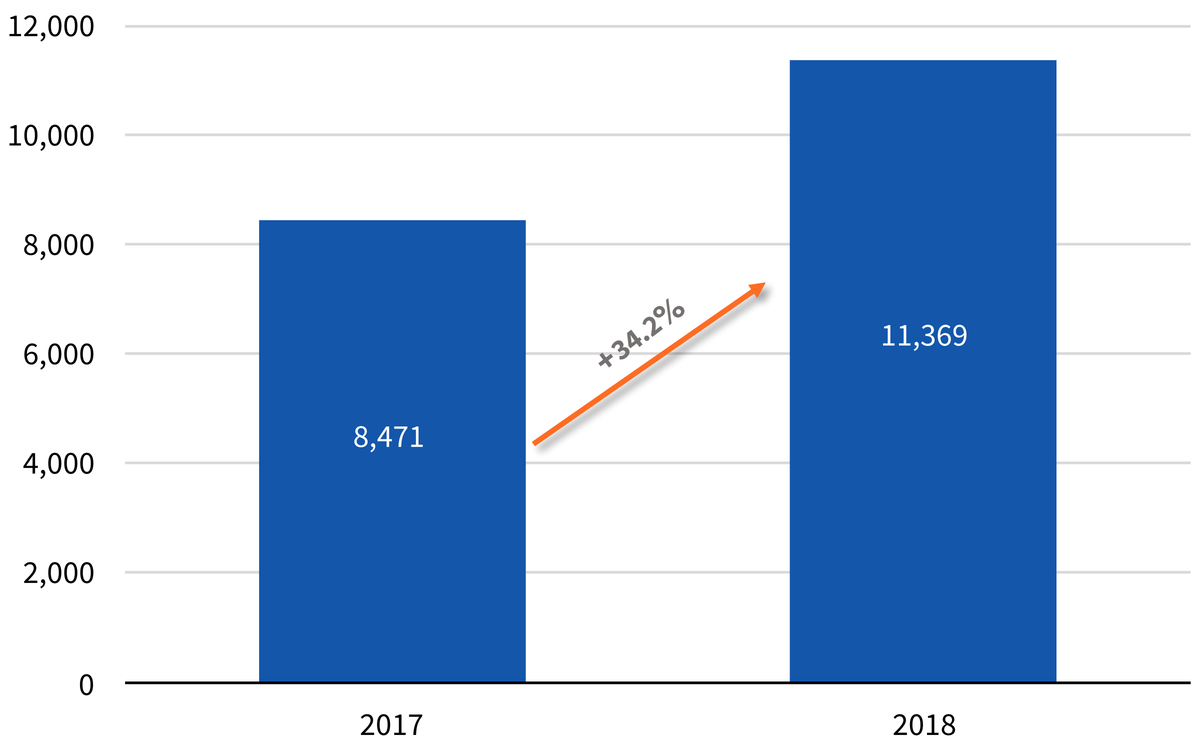


FIGURE 28 Mobile Display Ad Spend (€m) and Growth 2017 vs 2018



Jeremy Arditi
Chief Commercial Officer
Teads

Teads

The trend towards mobile consumption shows no signs of abating and the dollars are following. The AdEx Benchmark Study shows almost 50% of all digital ad spend is being directed to mobile content and devices. Video is the fastest growing format, now evenly split between instream and outstream, which reflects how successful many media companies have been at opening new revenue streams. With varying levels of maturity across the continent, there are still huge opportunities for growth for our industry over the next 5/10 years.

- **The 9 largest Mobile Display markets in terms of ad spend** are in Western Europe.
- **13 markets were mobile-first (fig. 30):** their Mobile share of Display exceeds 50%.
- **However, CEE marketing show comparably strong Mobile maturity** (i.e. share of Display), with some markets ahead of large markets like Germany, Spain or France..
- **Growth leaders** are mainly emerging markets, but Germany is witnessing a surge in Mobile growth, recording the second highest growth rate.

FIGURE 29 ▷ Mobile Display Ad Spend Growth by Market in 2018

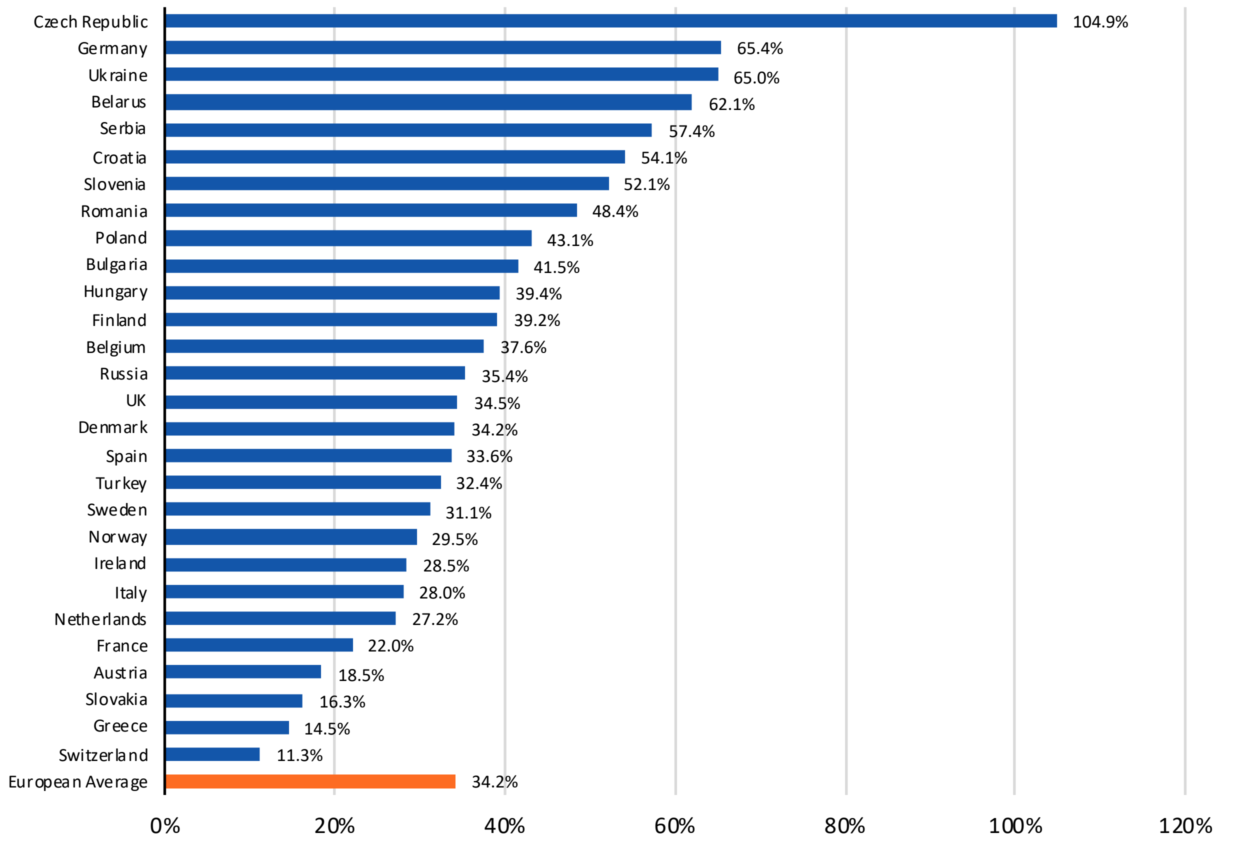


FIGURE 30 ▷ Mobile Share of Display Ad Spend by Market in 2018

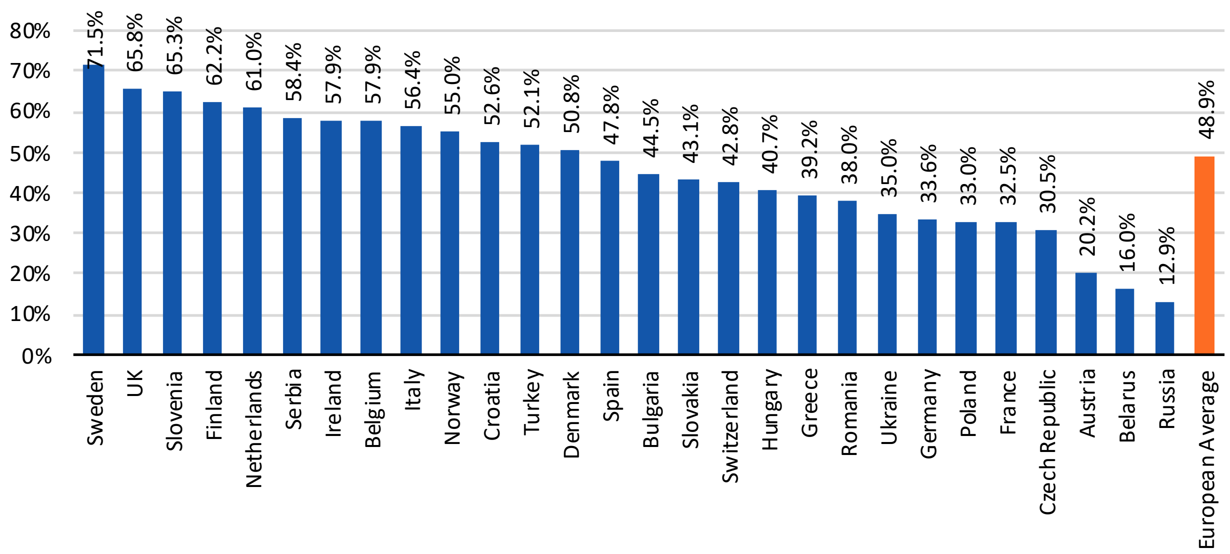
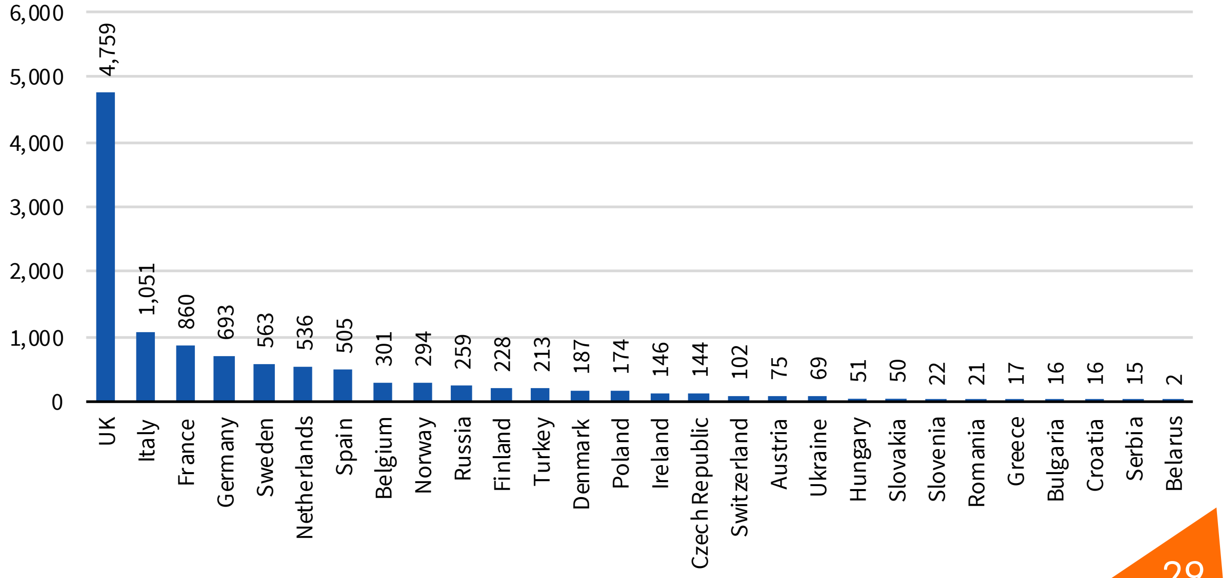


FIGURE 31 ▷ Mobile Display Ad Spend by Market in 2018 (€m)



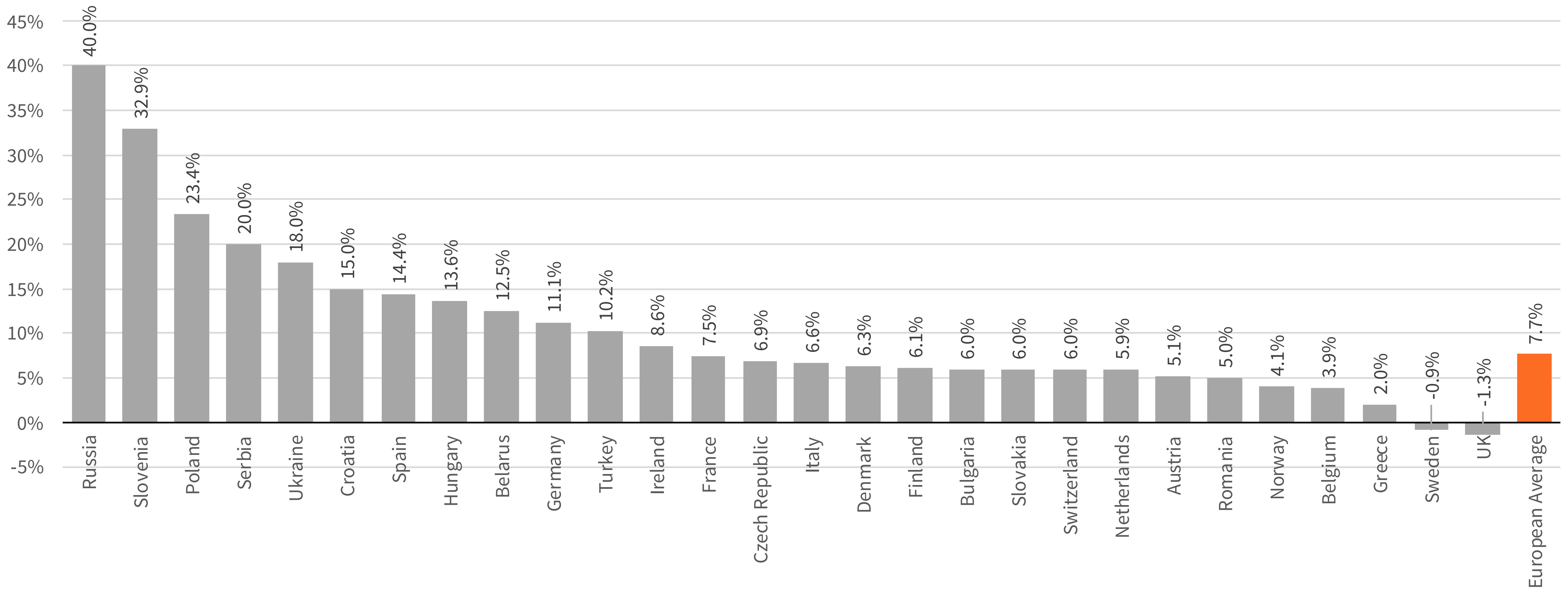
Christophe Collet
CEO and Founder
S4M

S4M

As the first real personal media, mobile has become an extension of the consumers. Advertisers are now fully aware that mobile phones are a way of increasing their standing and their sales, with a growing number of them turning toward digital ads to sell their products. Hence why we believe that advertising metrics should not be separated across the digital and physical worlds. With our drive-to-store ad formats, we help our clients fully benefit from insights on their customers' behaviors, both online and offline, to better manage their media investments and optimise their best performing channels.

- **Markets in Central & Eastern Europe** dominated growth in Classifieds & Directories.
- **12 markets** grew above European average.
- **Consolidation** is driving Classifieds & Directories sites, especially in France, Germany, and Spain. But the revenue model is increasingly programmatic display.

FIGURE 32 ▷ Classifieds & Directories Growth in 2018



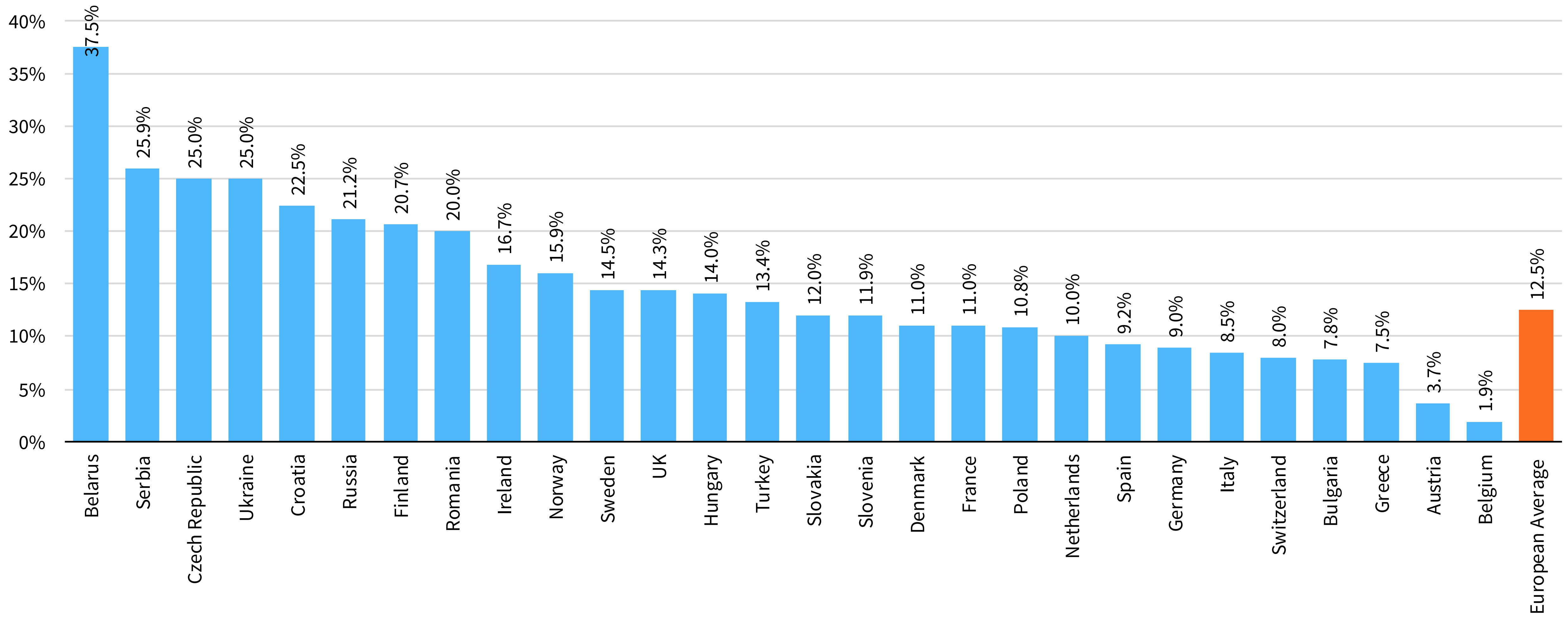
Phuong Nguyen
GM Advertising EMEA
eBay

ebay advertising

Advertising and ecommerce are converging and it's a segment that will continue to grow. Today's convenience culture means consumers expect to be able to browse content, research products and services and buy them all in one place – and both brands and agencies are having to adapt to this changing behaviour. As brands look to create a more direct connection with consumers, they are also under pressure to ensure that engagement counts – and this means measuring and optimizing everything from prospecting to sales. Smart agencies are diversifying their offer to help them win a slice of the ecommerce budgets that are growing as a result.

- **Top 6 markets in terms of growth** are located in Central & Eastern Europe. Finland, Sweden and Norway are among the fastest growing search markets in Western Europe.
- **Performance-based model** makes the Paid-for Search market resilient against cost-cutting.
- **The UK is the largest Paid-for Search market** in Europe and still grew above European average.

FIGURE 33 ▷ Paid-for Search Growth in 2018



- **Mobile Search grew by 28.6%** in 2018 to €11.6 billion.
- **Within a year it increased its share** of total Search by 5.8 percentage points.
- **Despite slightly lower growth than Mobile Display,** Mobile Search is approx. €0.2 billion bigger than mobile display due to the overall larger size of the Search market.
- **Higher ad rates** were a key driver behind Mobile Search, which has traditionally commanded lower rates than Desktop Search. The share of Mobile searches is still approx. 10% higher than the share of Mobile spend. But the gap is narrowing.
- **Mobile Search also benefited from higher Mobile Search volumes** overall, helped by better integration with maps and changing consumer habits.

FIGURE 34 Mobile & Desktop Share of Search 2017 vs 2018

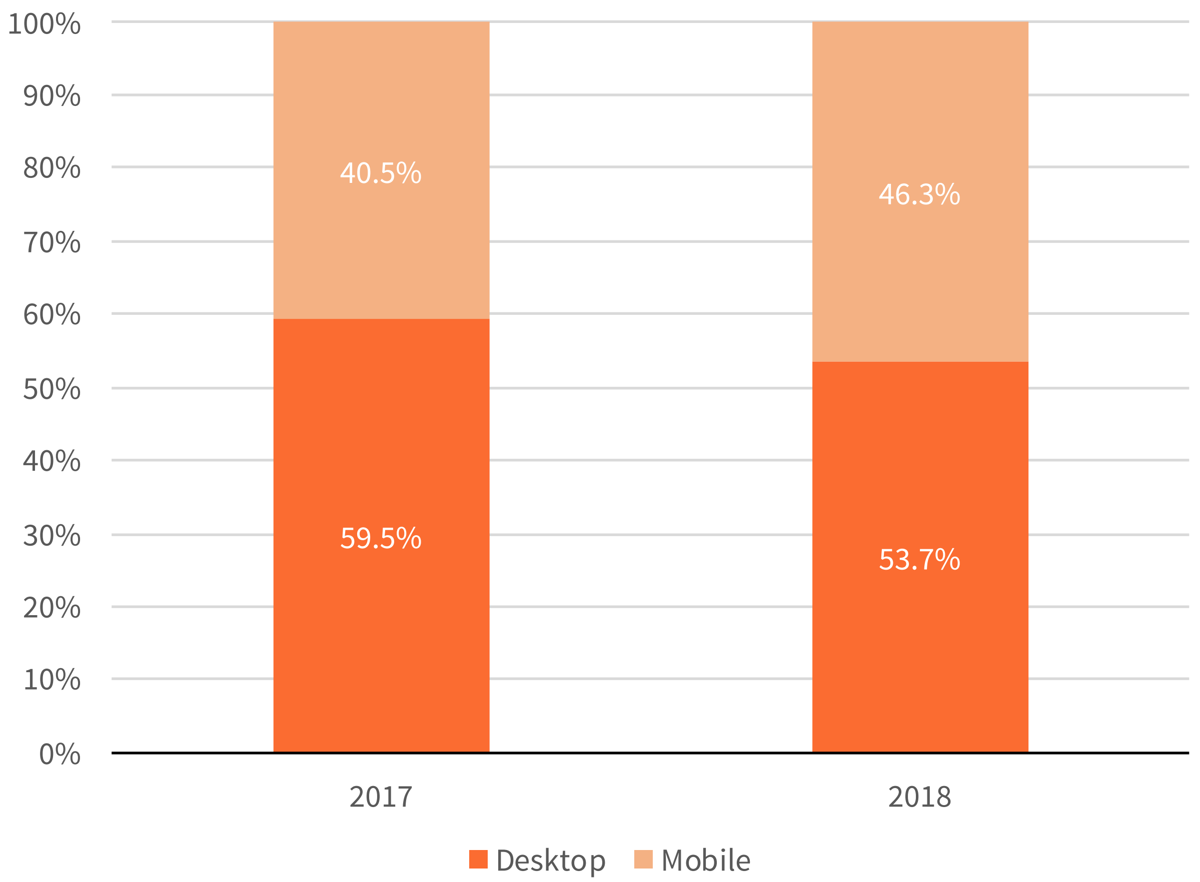
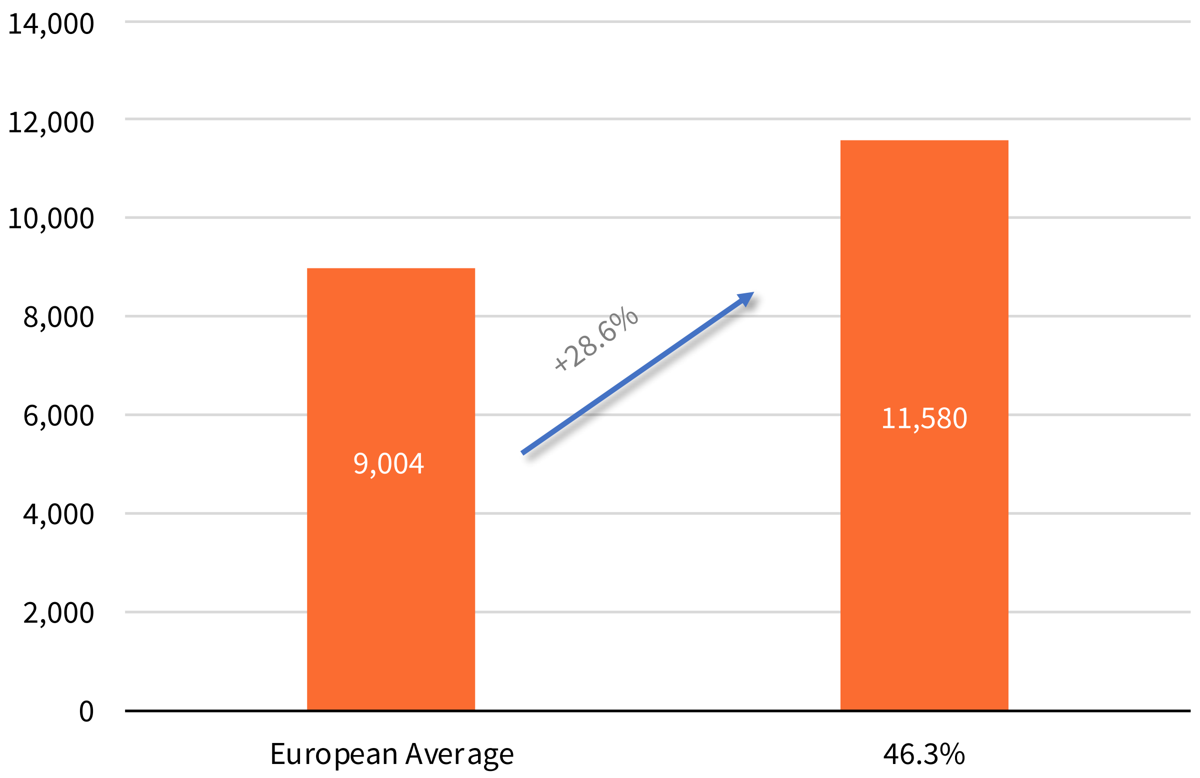


FIGURE 35 Mobile Search Ad Spend (€m) and Growth 2017 vs 2018



Axel Steinman
Vice President
Microsoft Advertising

Microsoft

The performance advertising industry continues to grow and evolve at an increased pace. We're witnessing momentum toward increased privacy expectations, a renewed focus on the value of trust, and commitment to marketing that is both inclusive and also targeted. At Microsoft Advertising, we are building on a decade of success with Bing with over 100 months of consecutive share growth.

- **9 out of the 10 largest Mobile Search markets** are in Western Europe, Russia ranks fourth.
- **Eight markets are mobile-first:** their Mobile share of Search exceeds 50%. Five markets have a Mobile share larger than 60%.
- **Growth leaders** are markets in Central and Eastern Europe, Norway is the fastest-growing Western Europe market. The UK, the largest mobile search market, is growing in line with the European average.

FIGURE 36 ▷ Mobile Search Ad Spend Growth by Market in 2018

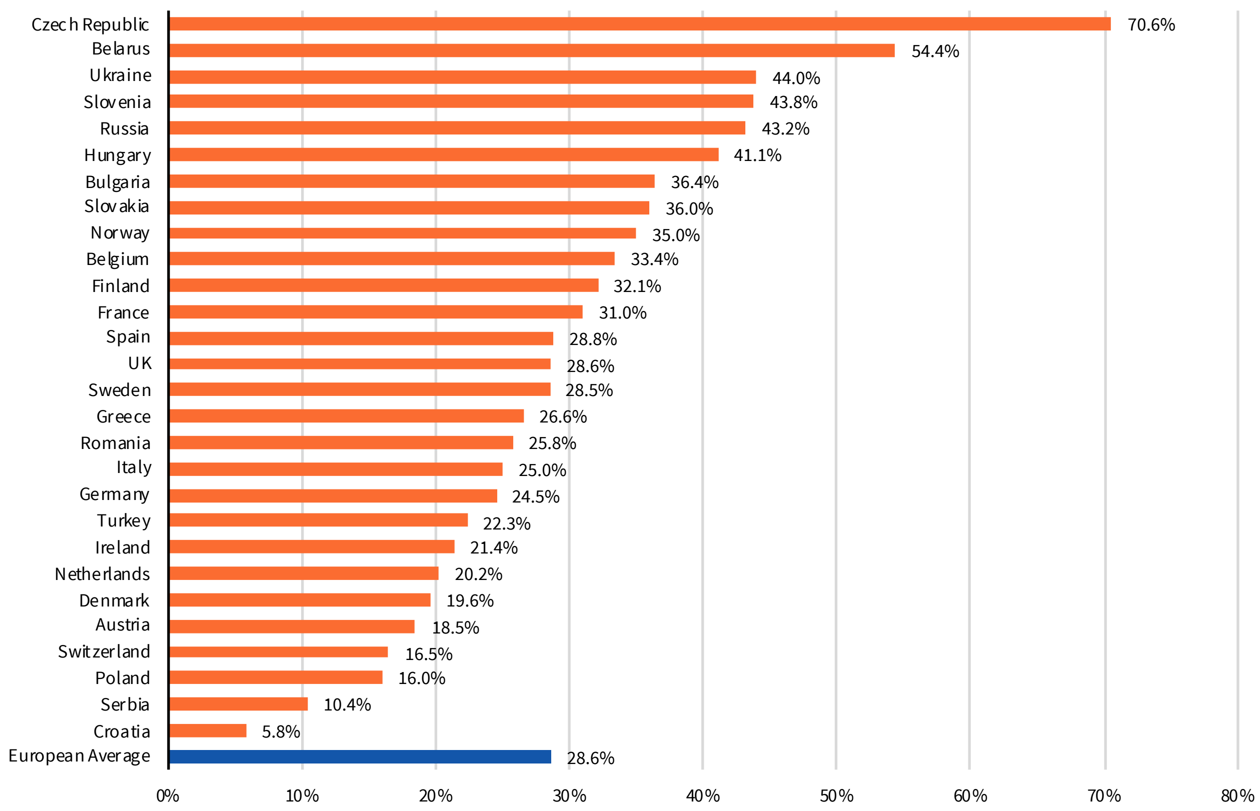


FIGURE 37 ▷ Mobile Share of Paid-For Ad Spend by Market in 2018

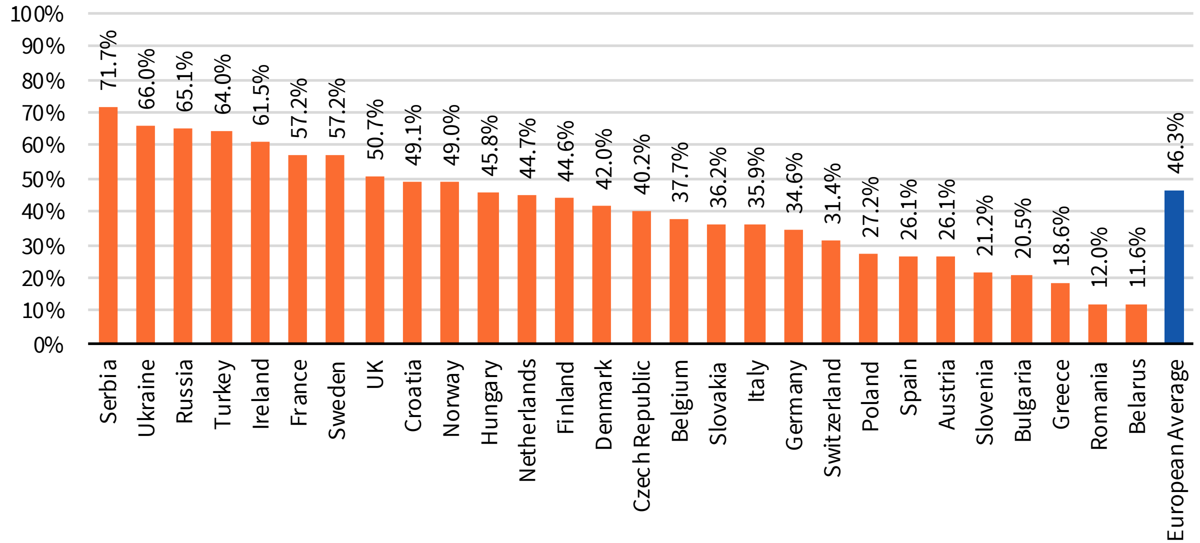
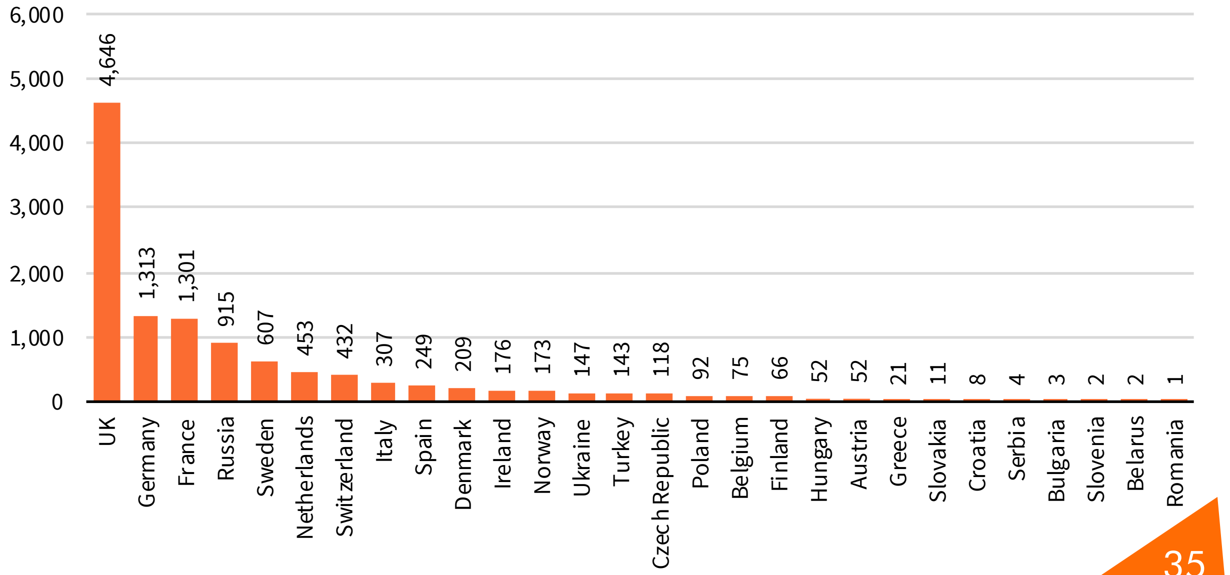


FIGURE 38 ▷ Mobile Search Ad Spend by Market in 2018 (€m)



Simon Halstead
Senior Director, Exchanges and Supply, International
Verizon Media

The AdEx Benchmark report shows strong and continued growth across digital channels, and the digital transformation of all our lives. Mobile growth is continuing to outpace other access points, and the explosion of 5G set to bring huge opportunities in the coming month means the mobile experience will improve and strengthen, enabling richer experiences and greater faster experiences across existing and new XR enabled products for consumers. Brands need to be thinking now about how they will be showing up in this new world of 5G content experiences that is being called the next industrial revolution.

Section 3

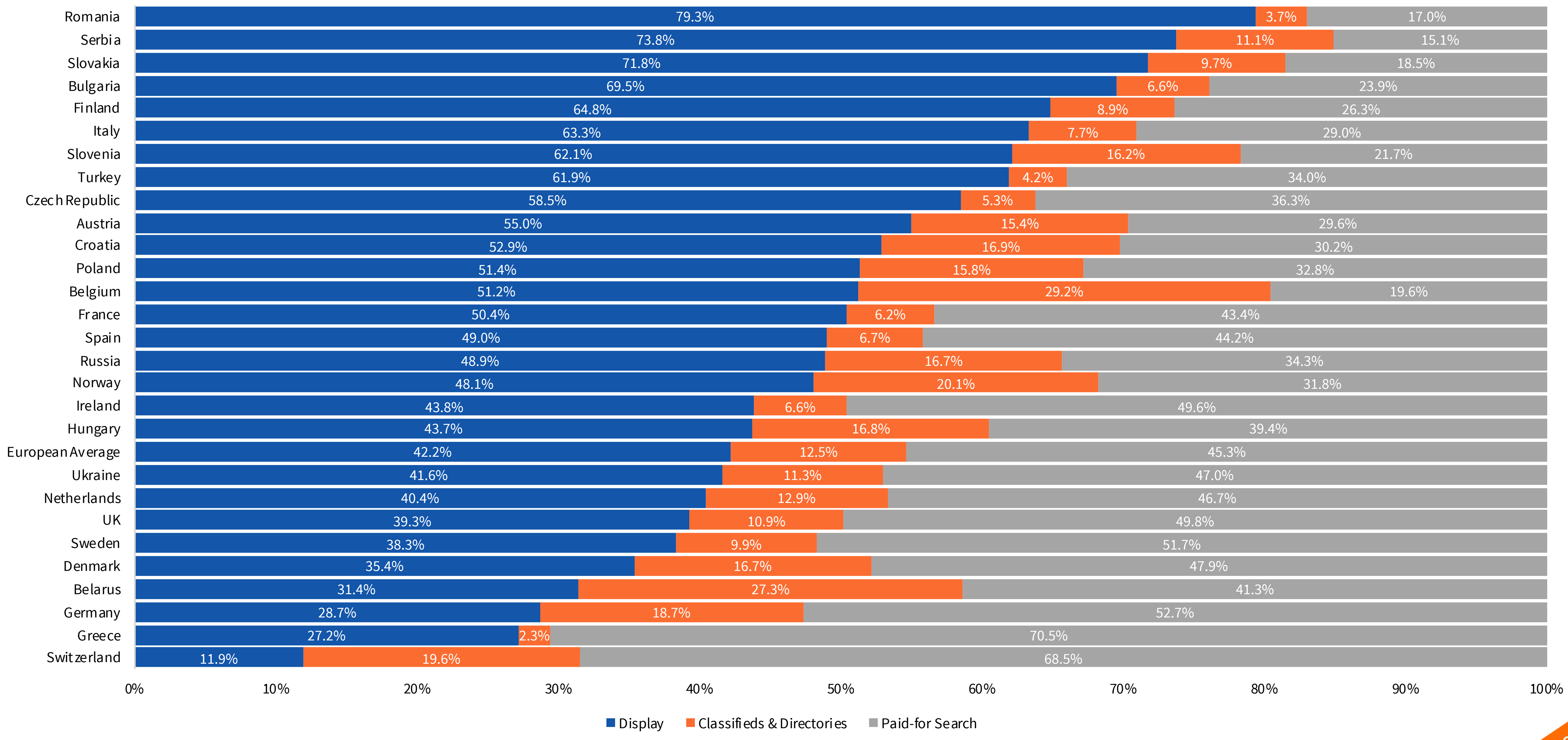
Overview of Markets

adex Benchmark 2018

#adexbenchmark

iab europe

FIGURE 39 ▷ Share of Digital Ad Spend by Format per Market in 2018 (*Ranked by Share of Display*)



Austria	
Digital Ad Spend	€675m
Year-on-Year Growth	10.3%
Digital Ad Spend per Capita	€77.2

Belarus	
Digital Ad Spend	€48m
Year-on-Year Growth	23.6%
Digital Ad Spend per Capita	€5.1

Belgium	
Digital Ad Spend	€1,015m
Year-on-Year Growth	1.5%
Digital Ad Spend per Capita	€88.8

Bulgaria	
Digital Ad Spend	€51m
Year-on-Year Growth	7.0%
Digital Ad Spend per Capita	€7.2

Croatia	
Digital Ad Spend	€56m
Year-on-Year Growth	18.0%
Digital Ad Spend per Capita	€13.4

Czech Republic	
Digital Ad Spend	€807m
Year-on-Year Growth	20.9%
Digital Ad Spend per Capita	€76.0

Denmark	
Digital Ad Spend	€1.042m
Year-on-Year Growth	10.0%
Digital Ad Spend per Capita	€181.7

Finland	
Digital Ad Spend	€565m
Year-on-Year Growth	16.4%
Digital Ad Spend per Capita	€102.4

France	
Digital Ad Spend	€5,244m
Year-on-Year Growth	18.3%
Digital Ad Spend per Capita	€80.7

Germany	
Digital Ad Spend	€7,201m
Year-on-Year Growth	8.8%
Digital Ad Spend per Capita	€86.8

Greece	
Digital Ad Spend	€161m
Year-on-Year Growth	5.8%
Digital Ad Spend per Capita	€14.5

Hungary	
Digital Ad Spend	€288m
Year-on-Year Growth	14.0%
Digital Ad Spend per Capita	€29.6

Ireland	
Digital Ad Spend	€577m
Year-on-Year Growth	16.0%
Digital Ad Spend per Capita	€121.1

Italy	
Digital Ad Spend	€2,943m
Year-on-Year Growth	11.2%
Digital Ad Spend per Capita	€49.6

Netherlands	
Digital Ad Spend	€2,175m
Year-on-Year Growth	8.0%
Digital Ad Spend per Capita	€127.7

Norway	
Digital Ad Spend	€1,111m
Year-on-Year Growth	14.3%
Digital Ad Spend per Capita	€209.4

Poland	
Digital Ad Spend	€1,025m
Year-on-Year Growth	13.9%
Digital Ad Spend per Capita	€26.9

Romania	
Digital Ad Spend	€70m
Year-on-Year Growth	16.7%
Digital Ad Spend per Capita	€3.6

Russia	
Digital Ad Spend	€4,093m
Year-on-Year Growth	24.9%
Digital Ad Spend per Capita	€28.4

Serbia	
Digital Ad Spend	€35m
Year-on-Year Growth	20.1%
Digital Ad Spend per Capita	€5.0

Slovakia	
Digital Ad Spend	€162m
Year-on-Year Growth	8.9%
Digital Ad Spend per Capita	€29.7

Slovenia	
Digital Ad Spend	€53m
Year-on-Year Growth	12.7%
Digital Ad Spend per Capita	€25.6

Spain	
Digital Ad Spend	€2,152m
Year-on-Year Growth	15.1%
Digital Ad Spend per Capita	€46.4

Sweden	
Digital Ad Spend	€2,054m
Year-on-Year Growth	12.3%
Digital Ad Spend per Capita	€207.3

Switzerland	
Digital Ad Spend	€2,010m
Year-on-Year Growth	7.1%
Digital Ad Spend per Capita	€237.1

Turkey	
Digital Ad Spend	€659m
Year-on-Year Growth	14.4%
Digital Ad Spend per Capita	€8.2

UK	
Digital Ad Spend	€18,399m
Year-on-Year Growth	15.1%
Digital Ad Spend per Capita	€278.0

Ukraine	
Digital Ad Spend	€475m
Year-on-Year Growth	26.9%
Digital Ad Spend per Capita	€10.7

Brian Fitzpatrick
GM Europe,
IPONWEB

IPONWEB

With more than 60% of global digital ad spend (outside of search) being transacted programmatically, a number that's only expected to grow, it's clear that the ecosystem needs: trust, confidence, and transparency. Complicated trading structures have contributed to concerns in these areas and we believe the solution is to enable an open ecosystem with full disclosure, where Brands know where their budgets are being spent.

Agencies, Data owners and Publishers are the ecosystem value creators. As an industry, we need to build far more sophisticated technology that will maximise the efficiency of media buying by bringing buyers and sellers closer together in the media buying chain.

Section 4

Background Data

adex

Benchmark 2018

#adexbenchmark

iab.europe

Top 20 desktop properties (December 2018)

Finland

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**4,376**	**100.0**
1	Google Sites	3,903	89.2
2	Microsoft Sites	2,736	62.5
3	Facebook	2,656	60.7
4	Sanoma Group	2,590	59.2
5	Alma Media	2,084	47.6
6	Otavamedia	1,795	41.0
7	Yleisradio Oy	1,691	38.6
8	Wikimedia Foundation Sites	1,432	32.7
9	OP-Pohjola	1,432	32.7
10	SUOMI.FI	1,416	32.4
11	S-ryhma Sites	1,277	29.2
12	MTV Oy	1,246	28.5
13	Elisa Oyj	1,161	26.5
14	Verizon Media	1,107	25.3
15	Aller Media	1,099	25.1
16	Spotify	1,096	25.0
17	Kesko Sites	1,052	24.0
18	Nordea Group	1,002	22.9
19	VEIKKAUS.FI	1,001	22.9
20	Linkedin	953	21.8

Source: Comscore MMX, Total Audience, December 2018, Finland

France

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**41,542**	**100.0**
1	Google Sites	35,554	85.6
2	Microsoft Sites	28,159	67.8
3	Facebook	21,432	51.6
4	Groupe Figaro CCM Benchmark	18,962	45.6
5	Amazon Sites	18,009	43.4
6	Webedia Sites	14,532	35.0
7	Verizon Media	13,912	33.5
8	Schibsted Media Group	11,479	27.6
9	Wikimedia Foundation Sites	10,937	26.3
10	La Poste	10,654	25.6
11	Orange Sites	10,441	25.1
12	French Government Sites	10,200	24.6
13	Solocal Group	10,028	24.1
14	Groupe Casino	10,023	24.1
15	Groupe TF1	9,680	23.3
16	Groupe Lagardere	8,736	21.0
17	Groupe Fnac	8,649	20.8
18	Groupe M6	8,626	20.8
19	Gruner+Jahr Sites	8,579	20.7
20	Iliad - Free.fr Sites	8,544	20.6

Source: Comscore MMX, Total Audience, December 2018, France

Top 20 desktop properties (December 2018)

Germany

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**58,870**	**100.0**
1	Google Sites	41,405	70.3
2	Microsoft Sites	39,029	66.3
3	Amazon Sites	31,129	52.9
4	United-Internet Sites	21,572	36.6
5	eBay	21,551	36.6
6	Axel Springer SE	19,651	33.4
7	Facebook	19,594	33.3
8	Hubert Burda Media	16,442	27.9
9	Deutsche Telekom	14,603	24.8
10	PayPal	13,611	23.1
11	Otto Gruppe	11,869	20.2
12	Sparkassen-Finanzgruppe	11,407	19.4
13	The Mozilla Organization	11,274	19.2
14	Verizon Media	10,858	18.4
15	Wikimedia Foundation Sites	10,530	17.9
16	Gruner+Jahr Sites	9,300	15.8
17	METRO Group	8,573	14.6
18	RTL Group Sites	8,372	14.2
19	ARD Sites	8,171	13.9
20	gutefrage.net GmbH	8,110	13.8

Source: Comscore MMX, Total Audience, December 2018, Germany

Ireland

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**41,675**	**100.0**
1	Google Sites	1,484	88.6
2	Microsoft Sites	1,320	78.8
3	Facebook	844	50.4
4	Amazon Sites	696	41.6
5	Irish Times Group	686	41.0
6	Verizon Media	657	39.2
7	RTE.IE	555	33.1
8	Distilled SCH	549	32.8
9	Linkedin	528	31.5
10	BBC Sites	485	28.9
11	Reach Group	423	25.2
12	TripAdvisor Inc.	421	25.1
13	Independent News & Media	399	23.8
14	Wikimedia Foundation Sites	381	22.8
15	Reddit	358	21.3
16	The Guardian	337	20.1
17	Spotify	328	19.6
18	eBay	327	19.5
19	Valve Corporation	280	16.7
20	Mail Online / Daily Mail	274	16.4

Source: Comscore MMX, Total Audience, December 2018, Ireland

Top 20 desktop properties (December 2018)

Italy

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**26,105**	**100.0**
1	Google Sites	24,076	92.2
2	Microsoft Sites	15,660	60.0
3	Facebook	15,313	58.7
4	Amazon Sites	12,722	48.7
5	ItaliaOnline	10,486	40.2
6	Gruppo Mondadori	9,298	35.6
7	Verizon Media	9,246	35.4
8	Wikimedia Foundation Sites	8,536	32.7
9	GEDI Gruppo Editoriale	7,238	27.7
10	RCS MediaGroup - Italian Digital Media	6,382	24.4
11	eBay	5,523	21.2
12	Gruppo Mediaset	5,499	21.1
13	Telecom Italia	4,488	17.2
14	TripAdvisor Inc.	4,164	16.0
15	Gruppo Poste Italiane	4,069	15.6
16	Dropbox Sites	3,991	15.3
17	Linkedin	3,974	15.2
18	ARANZULLA.IT	3,921	15.0
19	RAI Sites	3,708	14.2
20	Schibsted Media Group	3,632	13.9

Source: Comscore MMX, Total Audience, December 2018, Italy

Norway

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**4,002**	**100.0**
1	Schibsted Media Group	3,636	90.9
2	Google Sites	3,576	89.4
3	Microsoft Sites	2,814	70.3
4	Facebook	2,486	62.1
5	NRK Sites	2,240	56.0
6	Aller Media	2,017	50.4
7	Egmont Sites	1,752	43.8
8	Amedia Sites	1,696	42.4
9	Spotify	1,448	36.2
10	Digitale Medier 1881 AS	1,285	32.1
11	Wikimedia Foundation Sites	1,181	29.5
12	DIFI.NO	1,136	28.4
13	Verizon Media	1,023	25.6
14	Amazon Sites	933	23.3
15	DnB Group	917	22.9
16	Valve Corporation	905	22.6
17	Eniro Group	861	21.5
18	Netflix Inc.	712	17.8
19	NAV.NO	691	17.3
20	Linkedin	660	16.5

Source: Comscore MMX, Total Audience, December 2018, Norway

Top 20 desktop properties (December 2018)

Spain

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**21,538**	**100.0**
1	Google Sites	20,337	94.4
2	Microsoft Sites	15,589	72.4
3	Facebook	12,667	58.8
4	Amazon Sites	10,406	48.3
5	RCS MediaGroup - Unidad Editorial	9,109	42.3
6	Verizon Media	7,788	36.2
7	Wikimedia Foundation Sites	7,619	35.4
8	Prisa	7,391	34.3
9	Vocento	7,209	33.5
10	Linkedin	6,774	31.5
11	Webedia Sites	5,428	25.2
12	Spotify	4,911	22.8
13	Schibsted Media Group	4,859	22.6
14	BitTorrent Network	4,799	22.3
15	Dropbox Sites	4,340	20.2
16	Grupo Godo	4,339	20.1
17	Gobierno De España	4,197	19.5
18	Atresmedia	4,004	18.6
19	Henneo	3,868	18.0
20	El Corte Ingles Group	3,776	17.5

Source: Comscore MMX, Total Audience, December 2018, Spain

Sweden

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**6,785**	**100.0**
1	Google Sites	5,822	85.8
2	Microsoft Sites	4,471	65.9
3	Facebook	2,726	40.2
4	Schibsted Media Group	2,343	34.5
5	Spotify	1,976	29.1
6	Verizon Media	1,647	24.3
7	Swedbank	1,478	21.8
8	Bonnier Group	1,457	21.5
9	Wikimedia Foundation Sites	1,342	19.8
10	Sveriges Television	1,077	15.9
11	Linkedin	1,051	15.5
12	KLARNA.COM	1,021	15.0
13	Valve Corporation	1,018	15.0
14	Amazon Sites	1,001	14.8
15	Reddit	888	13.1
16	Netflix Inc.	686	10.1
17	Eniro Group	651	9.6
18	Ask Network	614	9.0
19	Nordea Group	610	9.0
20	Dropbox Sites	603	8.9

Source: Comscore MMX, Total Audience, December 2018, Sweden

Top 20 desktop properties (December 2018)

Switzerland

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**5,487**	**100.0**
1	Microsoft Sites	4,166	75.9
2	Google Sites	3,883	70.8
3	Verizon Media	1,688	30.8
4	Linkedin	1,396	25.4
5	Facebook	1,244	22.7
6	Amazon Sites	1,130	20.6
7	Swisscom Sites	1,076	19.6
8	TripAdvisor Inc.	939	17.1
9	Dropbox Sites	810	14.8
10	Wikimedia Foundation Sites	738	13.4
11	Valve Corporation	686	12.5
12	Schweizerische Post Sites	675	12.3
13	Spotify	634	11.6
14	Webedia Sites	619	11.3
15	Apple Inc.	595	10.8
16	Ask Network	562	10.2
17	Groupe Figaro CCM Benchmark	555	10.1
18	SRG SSR	517	9.4
19	Kantonalbank	507	9.2
20	RAIFFEISEN.CH	502	9.1

Source: Comscore MMX, Total Audience, December 2018, Switzerland

UK

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**35,253**	**100.0**
1	Google Sites	28,566	81.0
2	Microsoft Sites	26,461	75.1
3	Amazon Sites	18,314	52.0
4	Facebook	16,143	45.8
5	BBC Sites	14,726	41.8
6	Verizon Media	14,413	40.9
7	eBay	10,825	30.7
8	Reach Group	7,519	21.3
9	TripAdvisor Inc.	7,515	21.3
10	Linkedin	7,429	21.1
11	The Guardian	7,347	20.8
12	Wikimedia Foundation Sites	7,151	20.3
13	PayPal	6,550	18.6
14	Mail Online / Daily Mail	6,312	17.9
15	Valve Corporation	6,230	17.7
16	Sainsburys	6,209	17.6
17	Spotify	6,178	17.5
18	ROBLOX.COM	5,887	16.7
19	Reddit	5,618	15.9
20	CBS Interactive	5,576	15.8

Source: Comscore MMX, Total Audience, December 2018, UK

Top 20 video desktop properties (December 2018)

Finland

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**4,376**	**100.00**
1	Google Sites	2,175	49.71
2	Facebook	1,606	36.71
3	UPROXX	932	21.29
4	Alma Media	795	18.17
5	MTV Oy	775	17.72
6	BroadbandTV	655	14.96
7	VEVO	540	12.33
8	Aller Media	346	7.90
9	SEENTHIS.SE	326	7.45
10	ZEFR	301	6.87
11	Microsoft Sites	272	6.21
12	CBS Interactive	232	5.30
13	Curse	223	5.10
14	The Walt Disney Company	218	4.98
15	Sanoma Group	213	4.87
16	Machinima Entertainment	196	4.49
17	Fullscreen Video Network	194	4.44
18	Twitter	189	4.33
19	Studio71 Network	186	4.25
20	Comcast NBCUniversal	179	4.10

Source: Comscore VMX, Total Audience, December 2018, Finland

France

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**41,542**	**100.00**
1	Google Sites	26,960	64.90
2	Facebook	13,146	31.64
3	DAILYMOTION.COM	12,454	29.98
4	Digiteka	10,828	26.07
5	Webedia Sites	9,774	23.53
6	UPROXX	9,712	23.38
7	VEVO	9,127	21.97
8	BroadbandTV	7,619	18.34
9	Microsoft Sites	5,715	13.76
10	VIDAZOO.COM	5,314	12.79
11	Gruner+Jahr Sites	4,818	11.60
12	Verizon Media	4,394	10.58
13	Amazon Sites	4,170	10.04
14	ZEFR	3,493	8.41
15	Groupe TF1	3,164	7.62
16	The Walt Disney Company	2,832	6.82
17	OPENLOAD.CO	2,431	5.85
18	Groupe Fnac	1,863	4.48
19	Vimeo	1,815	4.37
20	Machinima Entertainment	1,658	3.99

Source: Comscore VMX, Total Audience, December 2018, France

Top 20 video desktop properties (December 2018)

Germany

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**58,870**	**100.00**
1	Google Sites	34,566	58.72
2	Amazon Sites	11,430	19.42
3	Facebook	11,200	19.02
4	UPROXX	8,992	15.28
5	BroadbandTV	7,881	13.39
6	VEVO	7,880	13.39
7	Hubert Burda Media	7,212	12.25
8	Studio71 Network	7,043	11.96
9	Microsoft Sites	5,677	9.64
10	RTL Group Sites	5,046	8.57
11	VIDAZOO.COM	4,381	7.44
12	ZEFR	3,629	6.17
13	Webedia Sites	3,451	5.86
14	SMARTCLIP.COM	3,315	5.63
15	Axel Springer SE	3,132	5.32
16	Verizon Media	3,027	5.14
17	United-Internet Sites	2,989	5.08
18	ProSiebenSat1 Sites	2,587	4.40
19	Pixelhouse GmbH	2,431	4.13
20	The Walt Disney Company	2,123	3.61

Source: Comscore VMX, Total Audience, December 2018, Germany

Ireland

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**1,675**	**100.00**
1	Google Sites	1,279	76.35
2	Facebook	539	32.17
3	UPROXX	522	31.14
4	VEVO	428	25.53
5	BroadbandTV	419	25.02
6	Microsoft Sites	320	19.08
7	ZEFR	253	15.13
8	Comcast NBCUniversal	214	12.75
9	CBS Interactive	208	12.42
10	The Walt Disney Company	188	11.24
11	Amazon Sites	161	9.58
12	Studio71 Network	134	8.01
13	DAILYMOTION.COM	126	7.52
14	Fullscreen Video Network	126	7.49
15	Verizon Media	125	7.43
16	Machinima Entertainment	123	7.34
17	Conde Nast Digital	117	6.97
18	Twitter	100	5.97
19	Curse	99	5.92
20	DistroScale Marketplace	99	5.90

Source: Comscore VMX, Total Audience, December 2018, Ireland

Top 20 video desktop properties (December 2018)

Italy

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**26,105**	**100.00**
1	Google Sites	15,773	60.42
2	Facebook	9,407	36.04
3	VEVO	5,346	20.48
4	UPROXX	5,311	20.35
5	BroadbandTV	3,331	12.76
6	Amazon Sites	3,169	12.14
7	RAI Sites	3,077	11.79
8	Gruppo Mediaset	2,894	11.09
9	Vimeo	2,066	7.92
10	ZEFR	2,021	7.74
11	OPENLOAD.CO	1,832	7.02
12	The Walt Disney Company	1,644	6.30
13	Microsoft Sites	1,580	6.05
14	DAILYMOTION.COM	1,555	5.96
15	Verizon Media	1,277	4.89
16	MEDIAMOND.IT	1,202	4.61
17	GEDI Gruppo Editoriale	1,151	4.41
18	DIGITALOCEANSPACES.COM	1,114	4.27
19	Machinima Entertainment	954	3.66
20	Gruppo SportNetwork	769	2.94

Source: Comscore VMX, Total Audience, December 2018, Italy

Norway

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**4,002**	**100.00**
1	Google Sites	2,295	57.34
2	Facebook	1,632	40.79
3	Schibsted Media Group	1,038	25.92
4	BroadbandTV	758	18.93
5	UPROXX	738	18.44
6	VEVO	565	14.11
7	Microsoft Sites	454	11.35
8	SEENTHIS.SE	425	10.61
9	Egmont Sites	395	9.88
10	ZEFR	359	8.96
11	Studio71 Network	314	7.84
12	CBS Interactive	313	7.83
13	Fullscreen Video Network	306	7.66
14	YOUPLAY.SE	305	7.62
15	The Walt Disney Company	285	7.12
16	Curse	275	6.87
17	Comcast NBCUniversal	259	6.48
18	AWX.NO	245	6.13
19	Machinima Entertainment	240	5.99
20	Omnia/Blue Ant Media	208	5.20

Source: Comscore VMX, Total Audience, December 2018, Norway

Top 20 video desktop properties (December 2018)

Spain

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**21,538**	**100.00**
1	Google Sites	15,274	70.92
2	Facebook	7,414	34.43
3	UPROXX	6,006	27.89
4	VEVO	5,777	26.82
5	BroadbandTV	4,654	21.61
6	Amazon Sites	2,907	13.50
7	Prisa	2,869	13.32
8	Microsoft Sites	2,730	12.68
9	ZEFR	2,539	11.79
10	Atresmedia	2,468	11.46
11	Webedia Sites	2,237	10.39
12	RTVE	2,107	9.78
13	Digiteka	1,851	8.60
14	RCS MediaGroup - Unidad Editorial	1,828	8.49
15	VIDAZOO.COM	1,758	8.16
16	Mediaset España	1,655	7.69
17	OPENLOAD.CO	1,629	7.57
18	DAILYMOTION.COM	1,536	7.13
19	Twitter	1,436	6.67
20	The Walt Disney Company	1,395	6.48

Source: Comscore VMX, Total Audience, December 2018, Spain

Sweden

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**6,785**	**100.00**
1	Google Sites	4,643	68.43
2	UPROXX	1,478	21.78
3	Facebook	1,473	21.71
4	BroadbandTV	1,470	21.66
5	VEVO	1,062	15.65
6	Bonnier Group	755	11.12
7	ZEFR	687	10.12
8	SEENTHIS.SE	651	9.59
9	Sveriges Television	639	9.42
10	Studio71 Network	614	9.05
11	Fullscreen Video Network	582	8.58
12	The Walt Disney Company	579	8.54
13	CBS Interactive	552	8.13
14	Microsoft Sites	543	8.01
15	Curse	486	7.16
16	Comcast NBCUniversal	481	7.08
17	Machinima Entertainment	457	6.74
18	Omnia/Blue Ant Media	431	6.36
19	YOUPLAY.SE	384	5.66
20	Conde Nast Digital	322	4.75

Source: Comscore VMX, Total Audience, December 2018, Sweden

Top 20 video desktop properties (December 2018)

UK

	Property	Total unique visitors (000)	Reach (%)
	Total Internet : Total Audience	**35,253**	**100.00**
1	Google Sites	23,489	66.63
2	Facebook	11,078	31.43
3	UPROXX	7,902	22.41
4	VEVO	7,166	20.33
5	BroadbandTV	6,566	18.63
6	Microsoft Sites	6,212	17.62
7	Amazon Sites	5,716	16.21
8	Verizon Media	5,006	14.20
9	ZEFR	3,885	11.02
10	The Walt Disney Company	3,565	10.11
11	Studio71 Network	3,500	9.93
12	CBS Interactive	3,371	9.56
13	Fullscreen Video Network	3,141	8.91
14	Comcast NBCUniversal	2,589	7.34
15	BBCI.CO.UK	2,442	6.93
16	Netflix Inc.	2,421	6.87
17	Machinima Entertainment	2,236	6.34
18	Omnia/Blue Ant Media	2,233	6.33
19	Reach Group	2,183	6.19
20	Conde Nast Digital	2,067	5.86

Source: Comscore VMX, Total Audience, December 2018, UK

Top 20 multi-platform properties (December 2018)

Finland

	Property	Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
	Total Internet : Total Audience	**4,614**	**4,376**	**3,328**	**100.0**	**100.0**	**100.0**
1	Google Sites	3,918	3,918		84.9	89.5	
2	Sanoma Group	3,829	2,591	3,170	83.0	59.2	95.2
3	Alma Media	3,666	2,118	3,139	79.4	48.4	94.3
4	Yleisradio Oy	3,523	1,702	3,103	76.3	38.9	93.2
5	Otavamedia	3,267	1,795	2,509	70.8	41.0	75.4
6	Microsoft Sites	2,766	2,742	119	60.0	62.7	3.6
7	Facebook	2,712	2,712		58.8	62.0	
8	Aller Media	2,435	1,113	1,819	52.8	25.4	54.7
9	Mediatalo Keskisuomalainen	2,290	701	1,918	49.6	16.0	57.6
10	Spotify	2,287	1,096	1,761	49.6	25.0	52.9
11	MTV Oy	2,211	1,347	1,303	47.9	30.8	39.2
12	Fonecta Sites	2,198	932	1,648	47.6	21.3	49.5
13	Schibsted Media Group	2,009	888	1,444	43.5	20.3	43.4
14	A-lehdet Sites	1,995	730	1,549	43.2	16.7	46.5
15	Wikimedia Foundation Sites	1,432	1,432		31.0	32.7	
16	OP-Pohjola	1,432	1,432		31.0	32.7	
17	SUOMI.FI	1,416	1,416		30.7	32.4	
18	S-ryhma Sites	1,393	1,277	228	30.2	29.2	6.8
19	Kaleva Media	1,308	431	993	28.3	9.8	29.8
20	Verizon Media	1,266	1,117	273	27.4	25.5	8.2

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, Finland

Top 20 multi-platform properties (December 2018)

France

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		48,735	41,542	36,053	100.0	100.0	100.0
1	Google Sites	46,265	38,599	33,723	94.9	92.9	93.5
2	Facebook	39,907	23,232	32,364	81.9	55.9	89.8
3	Groupe Figaro CCM Benchmark	34,509	18,993	27,292	70.8	45.7	75.7
4	Microsoft Sites	33,439	29,543	14,985	68.6	71.1	41.6
5	Webedia Sites	32,480	18,710	25,281	66.6	45.0	70.1
6	Amazon Sites	28,100	18,365	18,648	57.7	44.2	51.7
7	Groupe TF1	27,479	9,922	23,199	56.4	23.9	64.3
8	Verizon Media	24,664	14,544	16,879	50.6	35.0	46.8
9	Snapchat, Inc	19,356	119	19,325	39.7	0.3	53.6
10	Wikimedia Foundation Sites	18,969	10,943	12,116	38.9	26.3	33.6
11	Schibsted Media Group	18,887	11,511	11,415	38.8	27.7	31.7
12	Orange Sites	18,483	10,451	11,809	37.9	25.2	32.8
13	Gruner+Jahr Sites	18,311	9,065	12,725	37.6	21.8	35.3
14	La Poste	18,213	10,677	11,078	37.4	25.7	30.7
15	DAILYMOTION.COM	17,547	13,248	7,820	36.0	31.9	21.7
16	Groupe Lagardere	16,996	8,749	11,434	34.9	21.1	31.7
17	Solocal Group	16,716	10,060	9,789	34.3	24.2	27.2
18	Groupe Casino	16,627	10,023	9,797	34.1	24.1	27.2
19	Groupe M6	14,879	8,663	8,825	30.5	20.9	24.5
20	Groupe Fnac	13,743	8,738	7,326	28.2	21.0	20.3

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, France

Top 20 multi-platform properties (December 2018)

Germany

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		**61,714**	**58,870**	**44,278**	**100.0**	**100.0**	**100.0**
1	Google Sites	59,508	54,676	43,351	96.4	92.9	97.9
2	Facebook	48,059	21,378	41,753	77.9	36.3	94.3
3	Amazon Sites	43,471	32,265	28,058	70.4	54.8	63.4
4	Microsoft Sites	42,253	39,637	14,319	68.5	67.3	32.3
5	Axel Springer SE	38,105	20,062	29,457	61.7	34.1	66.5
6	eBay	35,703	21,551	25,565	57.9	36.6	57.7
7	United-Internet Sites	27,279	21,810	12,708	44.2	37.0	28.7
8	Hubert Burda Media	26,948	17,286	16,566	43.7	29.4	37.4
9	Deutsche Telekom	22,807	14,652	13,292	37.0	24.9	30.0
10	Verizon Media	21,090	11,404	13,876	34.2	19.4	31.3
11	Wikimedia Foundation Sites	20,015	10,530	13,275	32.4	17.9	30.0
12	PayPal	19,659	13,611	10,138	31.9	23.1	22.9
13	Otto Gruppe	17,914	11,882	9,513	29.0	20.2	21.5
14	Spotify	17,822	7,299	13,257	28.9	12.4	29.9
15	RTL Group Sites	16,614	9,011	10,452	26.9	15.3	23.6
16	Gruner+Jahr Sites	15,975	9,406	9,352	25.9	16.0	21.1
17	Apple Inc.	15,949	5,715	12,353	25.8	9.7	27.9
18	Scout24 Sites	15,903	6,714	11,517	25.8	11.4	26.0
19	METRO Group	15,764	8,573	9,821	25.5	14.6	22.2
20	Sparkassen-Finanzgruppe	14,199	11,422	5,327	23.0	19.4	12.0

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, Germany

Top 20 multi-platform properties (December 2018)

Italy

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		**39,296**	**26,105**	**32,236**	**100.0**	**100.0**	**100.0**
1	Google Sites	37,629	24,730	31,751	95.8	94.7	98.5
2	Facebook	35,143	16,470	31,627	89.4	63.1	98.1
3	Amazon Sites	30,006	12,948	24,644	76.4	49.6	76.4
4	Gruppo Mondadori	28,891	9,306	26,246	73.5	35.6	81.4
5	GEDI Gruppo Editoriale	24,927	7,614	21,056	63.4	29.2	65.3
6	Wikimedia Foundation Sites	24,909	8,536	20,723	63.4	32.7	64.3
7	Microsoft Sites	24,834	16,095	15,286	63.2	61.7	47.4
8	ItaliaOnline	24,569	10,505	18,941	62.5	40.2	58.8
9	Gruppo Mediaset	23,427	5,916	20,423	59.6	22.7	63.4
10	Verizon Media	22,118	9,320	16,915	56.3	35.7	52.5
11	Citynews - Gruppo Editoriale	21,054	3,377	19,178	53.6	12.9	59.5
12	Ciaopeople	18,707	1,824	17,605	47.6	7.0	54.6
13	RCS MediaGroup - Italian Digital Media	17,887	6,418	13,870	45.5	24.6	43.0
14	TripAdvisor Inc.	15,226	4,165	12,478	38.7	16.0	38.7
15	eBay	14,967	5,523	11,211	38.1	21.2	34.8
16	PayPal	14,266	2,737	12,438	36.3	10.5	38.6
17	ILFATTOQUOTIDIANO.IT	13,635	2,174	12,121	34.7	8.3	37.6
18	Quotidiano Net Network	13,153	2,218	11,613	33.5	8.5	36.0
19	Gruppo Poste Italiane	13,052	4,069	10,189	33.2	15.6	31.6
20	TPI.IT	13,047	1,866	11,739	33.2	7.1	36.4

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, Italy

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Top 20 multi-platform properties (December 2018)

Norway

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		**4,584**	**4,002**	**3,777**	**100.0**	**100.0**	**100.0**
1	Google Sites	4,403	3,621	3,579	96.1	90.5	94.8
2	Schibsted Media Group	4,118	3,689	3,327	89.8	92.2	88.1
3	Facebook	3,922	2,564	3,482	85.6	64.1	92.2
4	NRK Sites	3,825	2,240	3,393	83.4	56.0	89.8
5	Egmont Sites	3,347	1,759	3,054	73.0	44.0	80.9
6	Microsoft Sites	3,327	2,815	1,994	72.6	70.3	52.8
7	Aller Media	3,270	2,017	2,789	71.3	50.4	73.9
8	Amedia Sites	3,072	1,696	2,784	67.0	42.4	73.7
9	Spotify	2,804	1,448	2,414	61.2	36.2	63.9
10	Snapchat, Inc	2,627	19	2,625	57.3	0.5	69.5
11	Digitale Medier 1881 AS	2,469	1,285	1,904	53.9	32.1	50.4
12	VIPPS.NO	2,403	52	2,399	52.4	1.3	63.5
13	Wikimedia Foundation Sites	2,311	1,181	1,730	50.4	29.5	45.8
14	Apple Inc.	2,177	456	2,051	47.5	11.4	54.3
15	ABC Startsiden AS	2,103	534	1,874	45.9	13.3	49.6
16	Eniro Group	1,835	861	1,348	40.0	21.5	35.7
17	Netflix Inc.	1,697	1,093	966	37.0	27.3	25.6
18	DnB Group	1,689	917	1,120	36.9	22.9	29.7
19	Verizon Media	1,683	1,039	1,002	36.7	26.0	26.5
20	DIFI.NO	1,683	1,136	906	36.7	28.4	24.0

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, Norway

Top 20 multi-platform properties (December 2018)

Spain

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		**32,555**	**21,538**	**29,233**	**100.0**	**100.0**	**100.0**
1	Google Sites	32,131	20,464	29,224	98.7	95.0	100.0
2	Facebook	30,436	13,531	29,191	93.5	62.8	99.9
3	RCS MediaGroup - Unidad Editorial	27,436	9,220	25,275	84.3	42.8	86.5
4	Amazon Sites	25,643	10,764	21,282	78.8	50.0	72.8
5	Vocento	25,120	7,341	22,791	77.2	34.1	78.0
6	Prisa	24,811	8,379	21,549	76.2	38.9	73.7
7	Microsoft Sites	24,786	16,219	16,077	76.1	75.3	55.0
8	Atresmedia	21,279	5,085	18,639	65.4	23.6	63.8
9	Grupo Godo	20,548	4,520	18,275	63.1	21.0	62.5
10	Henneo	19,744	3,898	17,568	60.6	18.1	60.1
11	Twitter	19,657	3,779	17,634	60.4	17.5	60.3
12	Wikimedia Foundation Sites	18,958	7,619	14,638	58.2	35.4	50.1
13	Webedia Sites	17,488	6,772	13,468	53.7	31.4	46.1
14	Schibsted Media Group	16,700	4,872	13,799	51.3	22.6	47.2
15	Verizon Media	16,412	7,859	11,396	50.4	36.5	39.0
16	Zeta Gestión De Medios	15,926	3,558	13,720	48.9	16.5	46.9
17	Linkedin	14,497	6,825	9,853	44.5	31.7	33.7
18	El Corte Ingles Group	13,692	3,884	11,144	42.1	18.0	38.1
19	Axel Springer SE	12,897	2,386	11,300	39.6	11.1	38.7
20	ELCONFIDENCIAL.COM	12,564	2,688	10,670	38.6	12.5	36.5

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, Spain

Top 20 multi-platform properties (December 2018)

UK

Property		Total unique visitors (000)			Reach (%)		
		Total Digital Population	Desktop	Mobile	Total Digital Population	Desktop	Mobile
Total Internet : Total Audience		**49,072**	**35,253**	**40,886**	**100.0**	**100.0**	**100.0**
1	Google Sites	47,518	33,332	39,170	96.8	94.6	95.8
2	Facebook	42,761	18,774	38,583	87.1	53.3	94.4
3	Amazon Sites	41,973	18,550	35,157	85.5	52.6	86.0
4	BBC Sites	41,494	14,727	36,839	84.6	41.8	90.1
5	Microsoft Sites	40,499	27,100	23,816	82.5	76.9	58.2
6	Reach Group	37,072	8,898	32,225	75.5	25.2	78.8
7	Sky Sites	33,059	5,551	29,699	67.4	15.7	72.6
8	Verizon Media	32,698	15,128	22,789	66.6	42.9	55.7
9	eBay	32,203	10,825	25,101	65.6	30.7	61.4
10	News UK Sites	30,009	4,306	27,258	61.2	12.2	66.7
11	Mail Online / Daily Mail	29,198	6,413	25,274	59.5	18.2	61.8
12	PayPal	26,471	6,550	22,087	53.9	18.6	54.0
13	Apple Inc.	25,763	5,289	22,312	52.5	15.0	54.6
14	Twitter	25,617	5,735	21,812	52.2	16.3	53.3
15	Independent & Evening Standard (ESi Media)	25,044	5,496	21,441	51.0	15.6	52.4
16	Wikimedia Foundation Sites	24,874	7,152	20,083	50.7	20.3	49.1
17	The Guardian	23,403	7,348	18,519	47.7	20.8	45.3
18	Sainsburys	23,213	6,212	18,930	47.3	17.6	46.3
19	Snapchat, Inc	23,085	150	23,010	47.0	0.4	56.3
20	Hearst	22,203	4,507	19,220	45.2	12.8	47.0

Source: Comscore MMX Multi-Platform, Total Audience, December 2018, UK

Section 5

About IAB Europe

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iab.europe

Our Mission

IAB Europe is the European-level association for the digital marketing and advertising ecosystem. Through its membership of National IABs and media, technology and marketing companies, its mission is to lead political representation and promote industry collaboration to deliver frameworks, standards and industry programmes that enable business to thrive in the European market.

Our Research Strategy

Our programme of research illustrates the value and growth of the digital industry across Europe, it proves the business contribution of digital advertising which may be under threat of adverse legislation and provides insight and education to the market via studies gaining the opinions of the industry on specific topics. The programme includes benchmarking and shared pan-European studies including the AdEx Benchmark report and the European Programmatic Market Sizing report as well as projects to support our ongoing of policy advocacy.

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.

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 (GIG)
  - 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 Task Force
  - Measurement Organisations Forum
- Programmatic Trading Committee
- Research Committee
  - AdEx Benchmark Task Force
- Education and Training Committee

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.

Our Corporate Members

Acxiom, Adform, Admitad, Adobe, Adroll, AGOF, Amobee, Automattic, BBC, Bloomberg Media Group, Buzzfeed, Comscore, Conversant, Criteo, Didomi, Digital East , DMG Media, Double Verify, Dynata, eBay, ePrivacy, Exactag, Expedia, Facebook, Factual, Freewheel, Gemius, Goldbach Group, Google, GroupM, ID5, Improve Digital, Index Exchange, Integral Ad Science, IPONWEB, Iubenda, JP Politikens Hus, Kantar, Media Impact (Axel Springer), MediaMath, Meetrics, MetaX, Microsoft, Mobilewalla, NAI, NewsCorp, Nielsen, Omnicom Media Group, OneTrust, Oracle Data Cloud, , Outbrain, ProSieben.Sat1, Publicis Media, Pubmatic, Quantcast, Rakuten, Remerge, RTL Group, S4M, Salesforce, Sanoma, Schibsted, Simpli.fi, Sirdata, Sizmek, Smaato, Sojern, Sourcepoint Technologies, Spotad, Sportradar, Sublime, Taboola, Teads, The Adex, The Guardian, The Rubicon Project, The Telegraph, The Trade Desk, Turner Broadcasting, United Internet Media, Verizon Media, Virtual Minds, Visarity Technologies, Xandr, Zeta Global

Our National IAB Members

BVDW (IAB Germany), Danske Medier (IAB Denmark), IAB Austria, IAB Belgium, IAB Bulgaria, IAB Finland, IAB France, IAB Greece, IAB Hungary, IAB Ireland, IAB Italy, IAB Macedonia, IAB Netherlands, IAB Poland, IAB Portugal, IAB Romania, IAB Serbia, IAB Slovenia, IAB Slovakia, IAB Spain, IAB Sweden, IAB Switzerland, IAB Turkey, IAB UK, INAMA (IAB Croatia), INMA (IAB Norway), SPIR (Czech Republic).

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.

Section 6

With Thanks

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Benchmark 2018

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IAB Europe would like to thank all of the national IABs who have supported the production of this report by supplying and explaining their data to IAB Europe.

IAB Europe would also like to thank Comscore for providing the background data in section 4.

Comscore

Comscore (NASDAQ: SCOR) is a trusted partner for planning, transacting and evaluating media across platforms. With a data footprint that combines digital, linear TV, over-the-top and theatrical viewership intelligence with advanced audience insights, Comscore allows media buyers and sellers to quantify their multiscreen behaviour and make business decisions with confidence. A proven leader in measuring digital and set-top box audiences and advertising at scale, Comscore is the industry's emerging, third-party source for reliable and comprehensive cross-platform measurement. To learn more about Comscore, please visit comscore.com.

Section 7

Appendices

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Benchmark 2018

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The AdEx Benchmark study aggregates detailed ad spend from the categories below, which are reported to varying granularity by national IABs into the ones that make up this report:.

Digital Display Advertising

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

Digital Video Advertising

In-stream video advertising (pre-rolls, mid-rolls, post-rolls), Out-stream and In-feed video advertising. Some market data may include in-stream banner overlays and contextual video advertising (e.g. branded video players, contextual banner advertising sold against video content).

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).

Digital 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').

Digital 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.

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 Advertising

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

Mobile Advertising - Other

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

Search Engine Optimisation

(excluded from the AdEx Benchmark report)

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

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 (*not recommended in the Better Ads Standards*).

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.

IAB Austria

www.iab-austria.at

Source: Werbeplanung.at, Marktstudie Online Werbemarkt

IAB Belarus

www.iab.by

Source: IAB Belarus

Belgium Association of Marketing (BAM)

www.marketing.be

Source: Mediaxim

IAB Bulgaria

www.iabbulgaria.bg

Source: IAB Bulgaria, Ipsos Bulgaria

IAB Chapter in Croatia (INAMA)

www.inama.hr

Source: Inama

SPIR (Czech Republic)

www.spir.cz

Source: SPIR/IAB Czech Republic

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

IAB France

www.iabfrance.com

Source: SRI, UDECAM and PwC, IREP for directories

IAB Chapter in Germany (OVK in the BVDW)

www.bvdw.org

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

IAB Greece

www.iab.gr

Source: IAB Greece

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

IAB Poland

www.iabpolska.pl

Source: IAB Poland/PwC

IAB Romania

www.iab-romania.ro

Source: IAB Romania/PwC

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

IAB Sweden

www.iabsverige.se

Source: IRM

IAB Switzerland

www.iabswitzerland.ch

Source: Media Focus Schweiz GmbH

IAB Turkey

www.iab-turkiye.org

Source: IAB Turkey

IAB UK

www.iabuk.com

Source: IAB UK/PwC

IAB Ukraine

www.iab.com.ua

Source: IAB Ukraine

Methodology and Adjusted Data

Each national IAB runs its own annual online advertising spend benchmark study. The method for the studies varies by market. IAB Europe 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 mitigate exchange rate effects, all data is converted into Euros using a constant 2015 exchange rate.

Where ad spend is unavailable or incomplete, IAB Europe models the data based on public company reports, macroeconomic variables, agency data, interviews with key industry players and econometric modelling, subject to the approval of the each national IAB.

Author of the AdEx Benchmark 2018 report

Dr. Daniel Knapp
Chief Economist, IAB Europe

Dr. Daniel Knapp is an advertising and media analyst with more than 15 years of international experience. He has served in leadership roles spanning market analysis, strategic advisory, and business intelligence. He is Chief Economist at IAB Europe, and also launching a new data analytics company.

Previously he was Executive Director at IHS Markit (NASDAQ: INFO), overseeing the company's global advertising & media research, consulting and forecasting practice. Daniel's key research areas span all domains of digital advertising, TV and video, platform economics, data strategies and the business application of AI/ML technologies. He also is former associated expert to the European Commission on a report on the media and artificial intelligence published in March 2019. Daniel holds a PhD from the London School of Economics (LSE) on the sociology of algorithms and the datafication of media.

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