



# Hungarian Digital Ad Spend Study 2014

**IAB Adex**

**Digital Ad Spend Study**

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# IAB Adex

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

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

- **Segments**

- Display
- Search
- Listing
- E-mail
- Mobile (search, display)

- **Display subsegments**

- Video
- Programmatic

# Partners

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# Partners

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



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

# **Methodology**



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# IAB Hungary Adex 2014 methodology

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- Report is based on data supplied by companies and estimations by experts for a few market segments
  - Display: data collection and estimation (for global players)
  - Search: estimation (for global players)
  - Listing: estimation
  - Email: data collection and estimation
  - Mobile: data collection and estimation (for global players)
- Data was provided by 30 publishing houses & sales houses, 27 media agencies and several dozens of media professionals (see the appendix)

# **IAB Hungary Adex 2014**

## **Highlights**

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# Key trends

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- Growth

- 2014 shows strong growth

- Mobile

- Advertisers are moving to mobile

- Local – Global shift

- This phenomenon influences most market segments
- Especially mobile

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# 2014 Digital Ad Spend

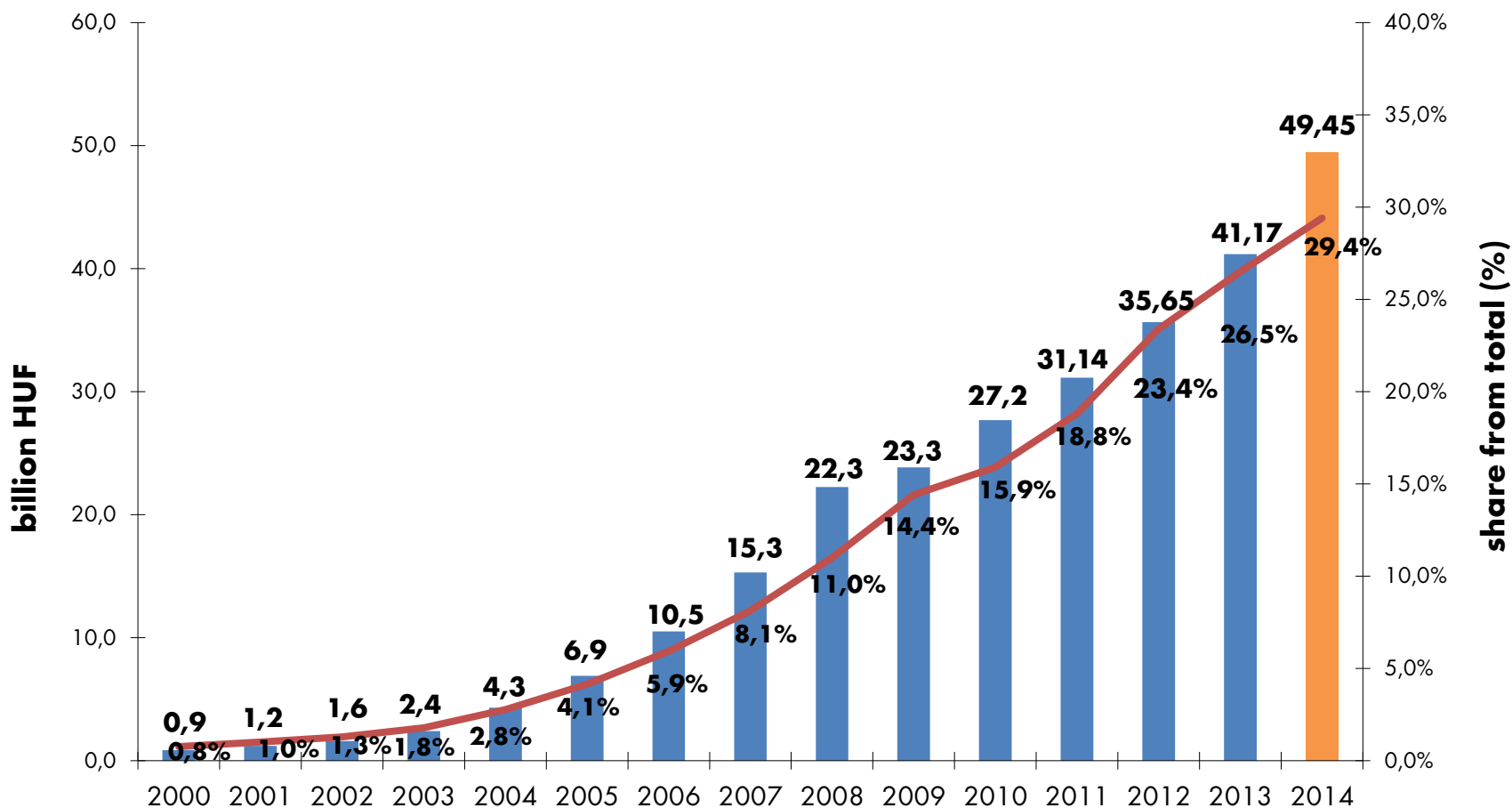
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**49,45 billion HUF**

**+ 20% YoY**

# Trends in ad spend, 2000-2014

## Digital ad spend and its market\* share

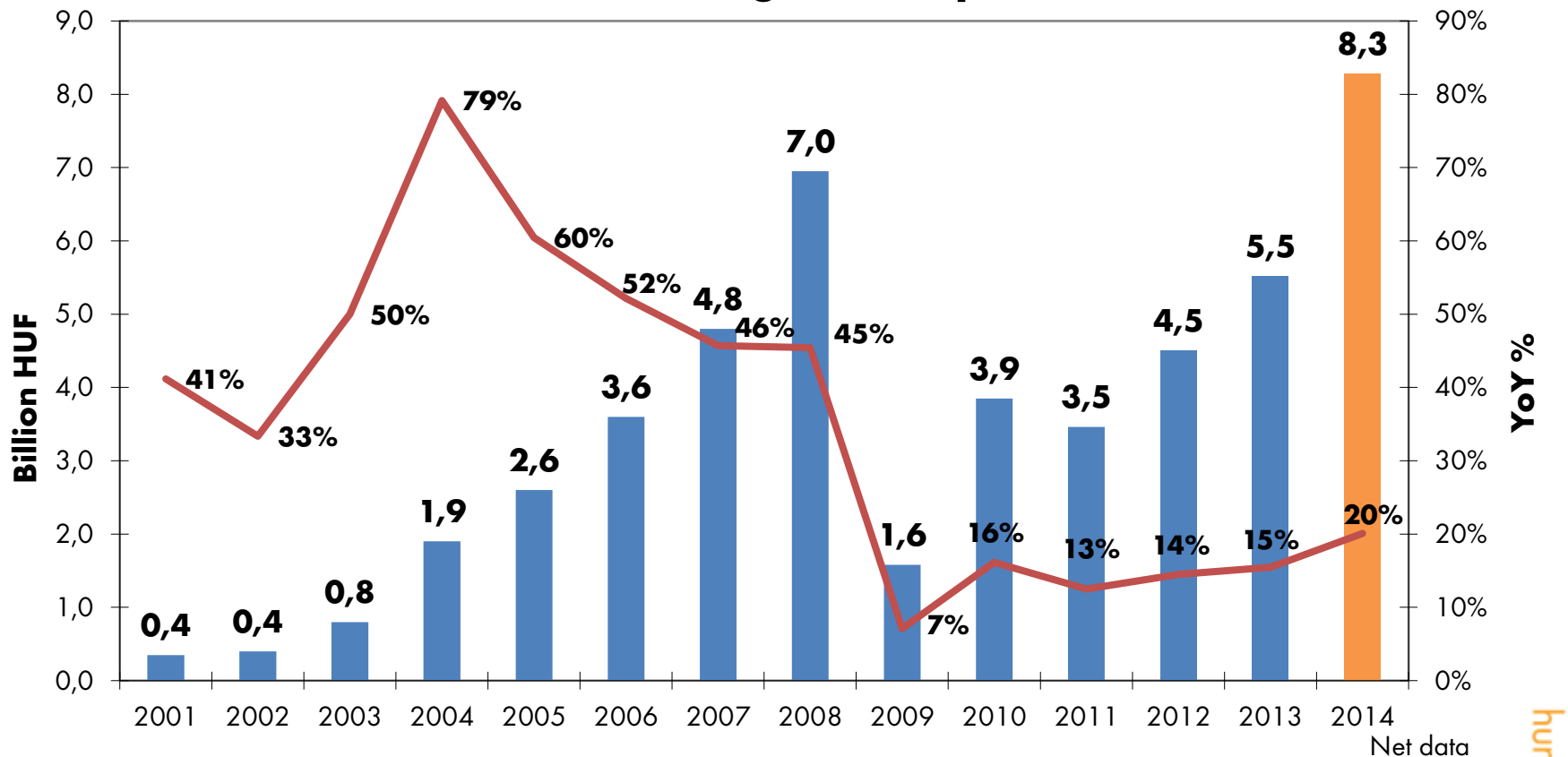


\* 2011-2014: net-net digital spend / net-net total ad spend (without DM)

# Growth trends, 2000-2014

- Growth is even higher than the pre-2009 levels

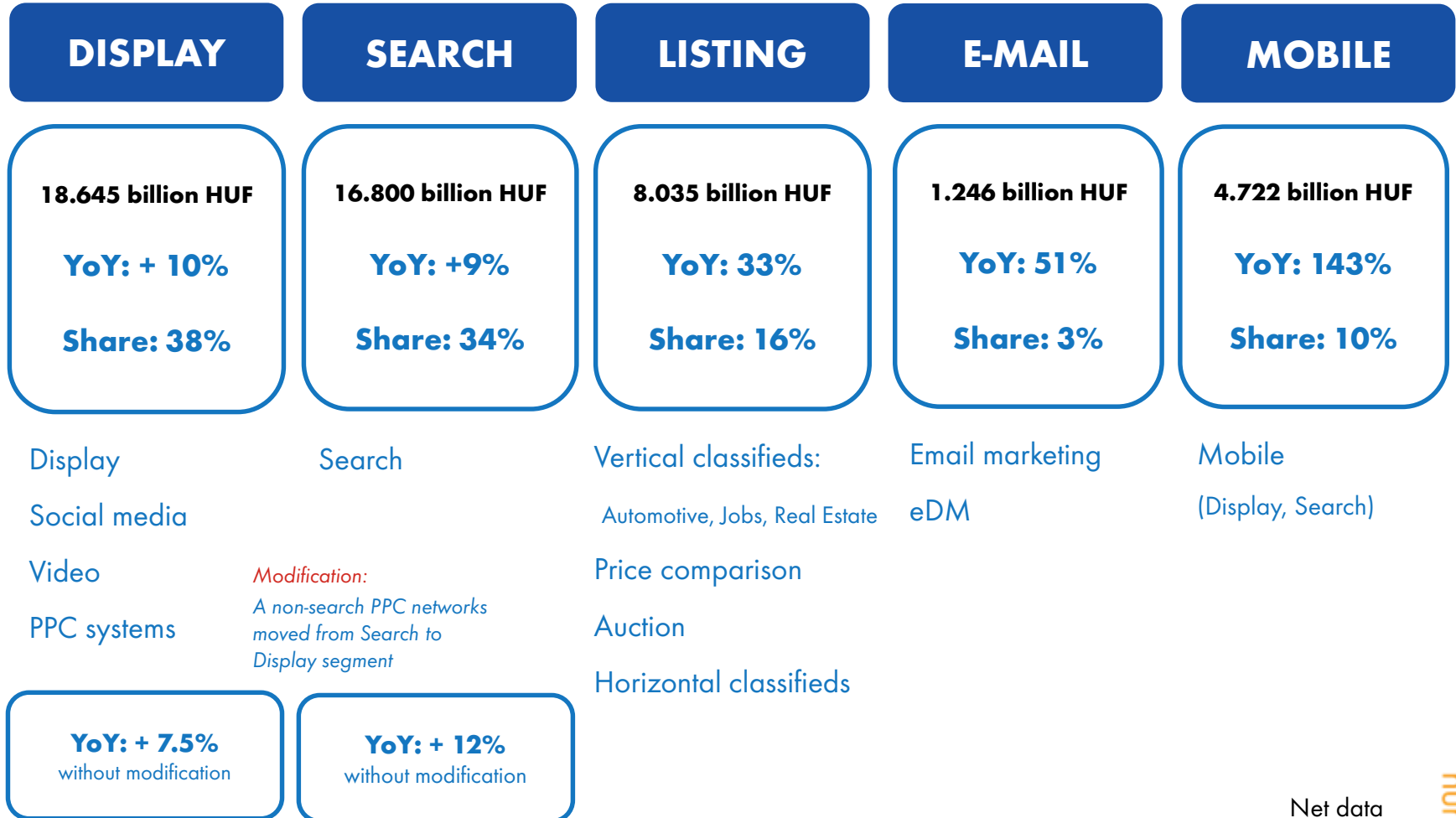
## Growth of digital ad spend



# **IAB Hungary Adex 2014**

## **Segment Data**

# Segments

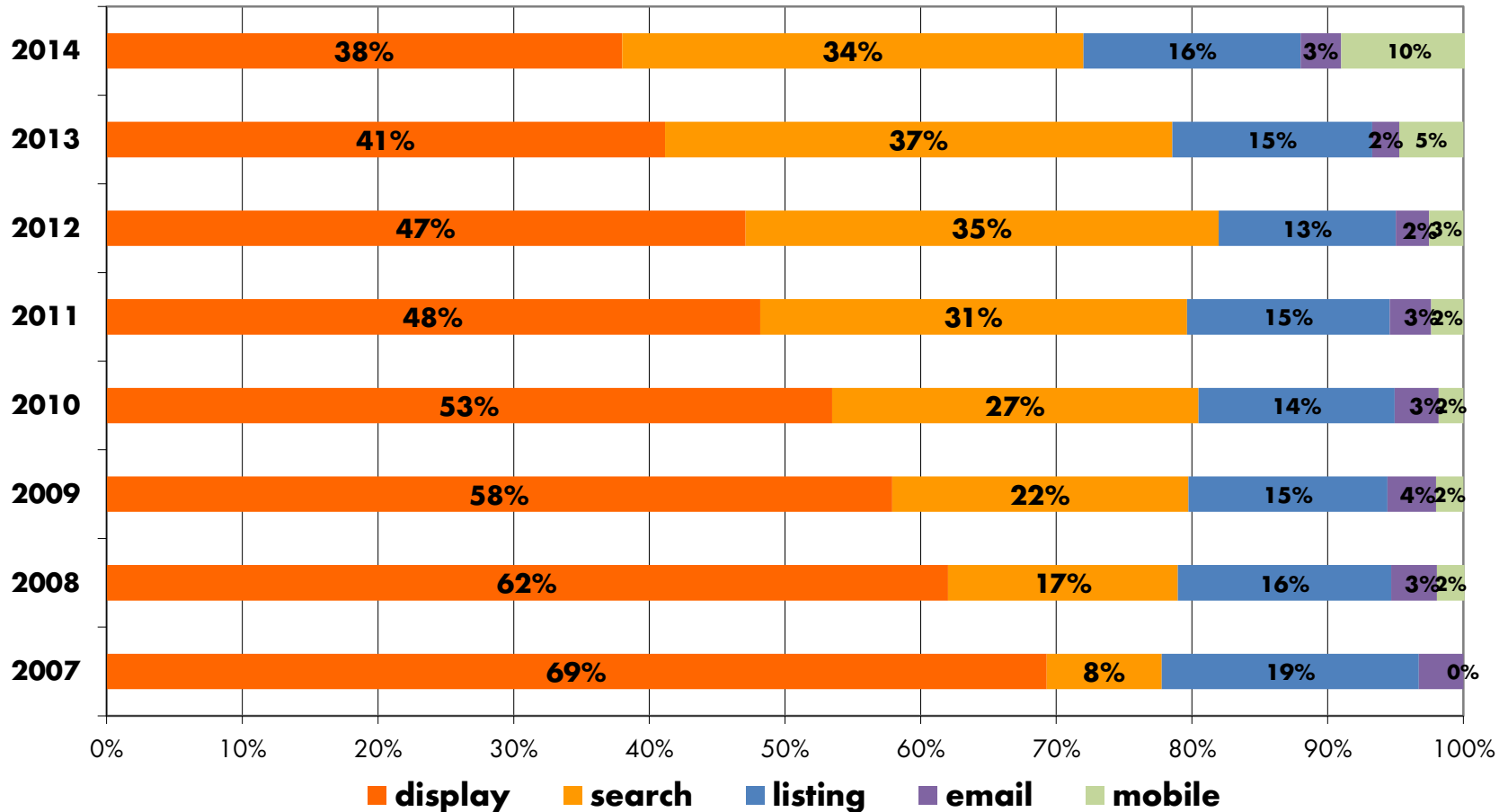


Net data



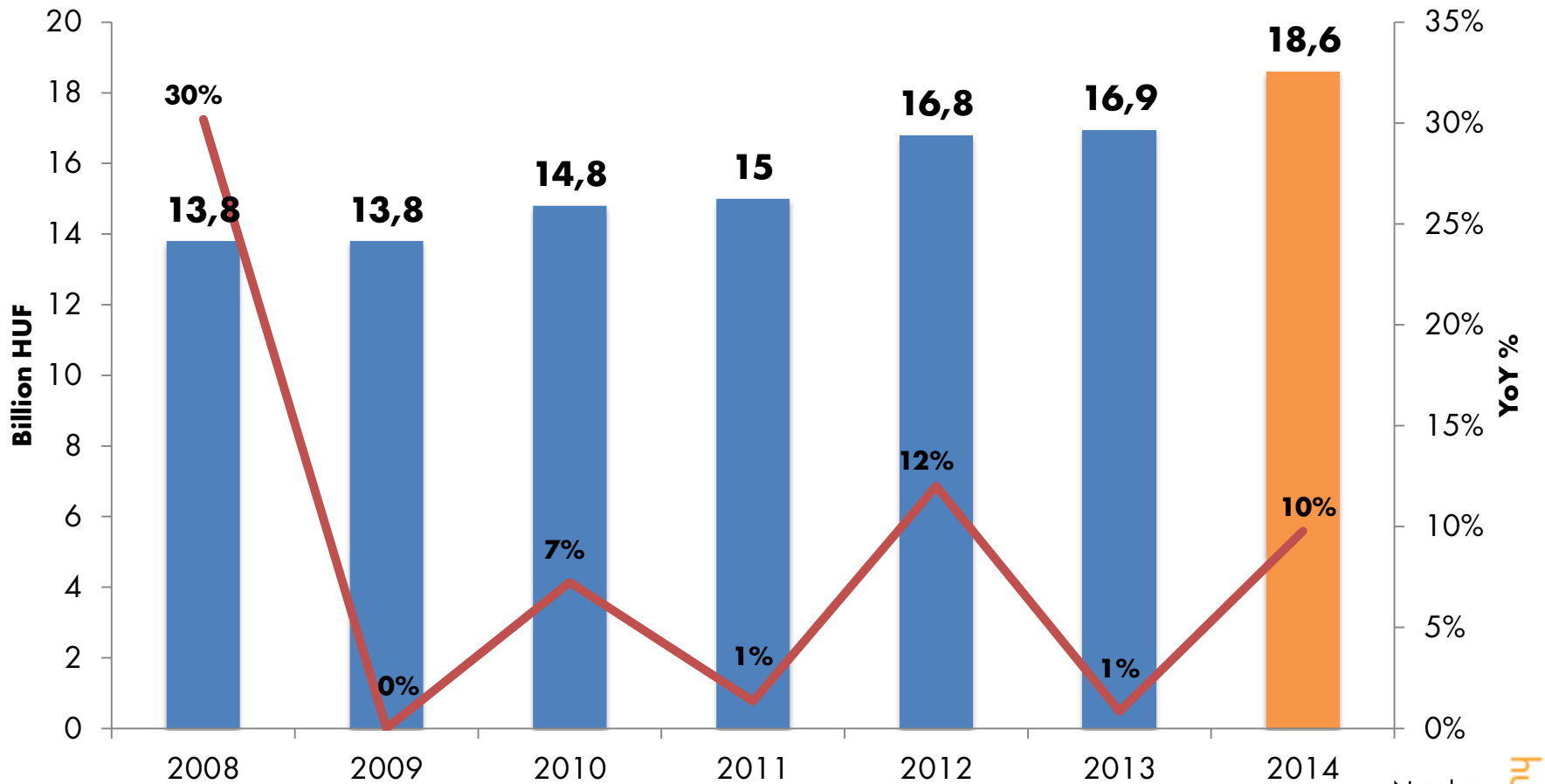
# Changing market structure

## Digital ad spend by segments



# Display (web): 10% growth

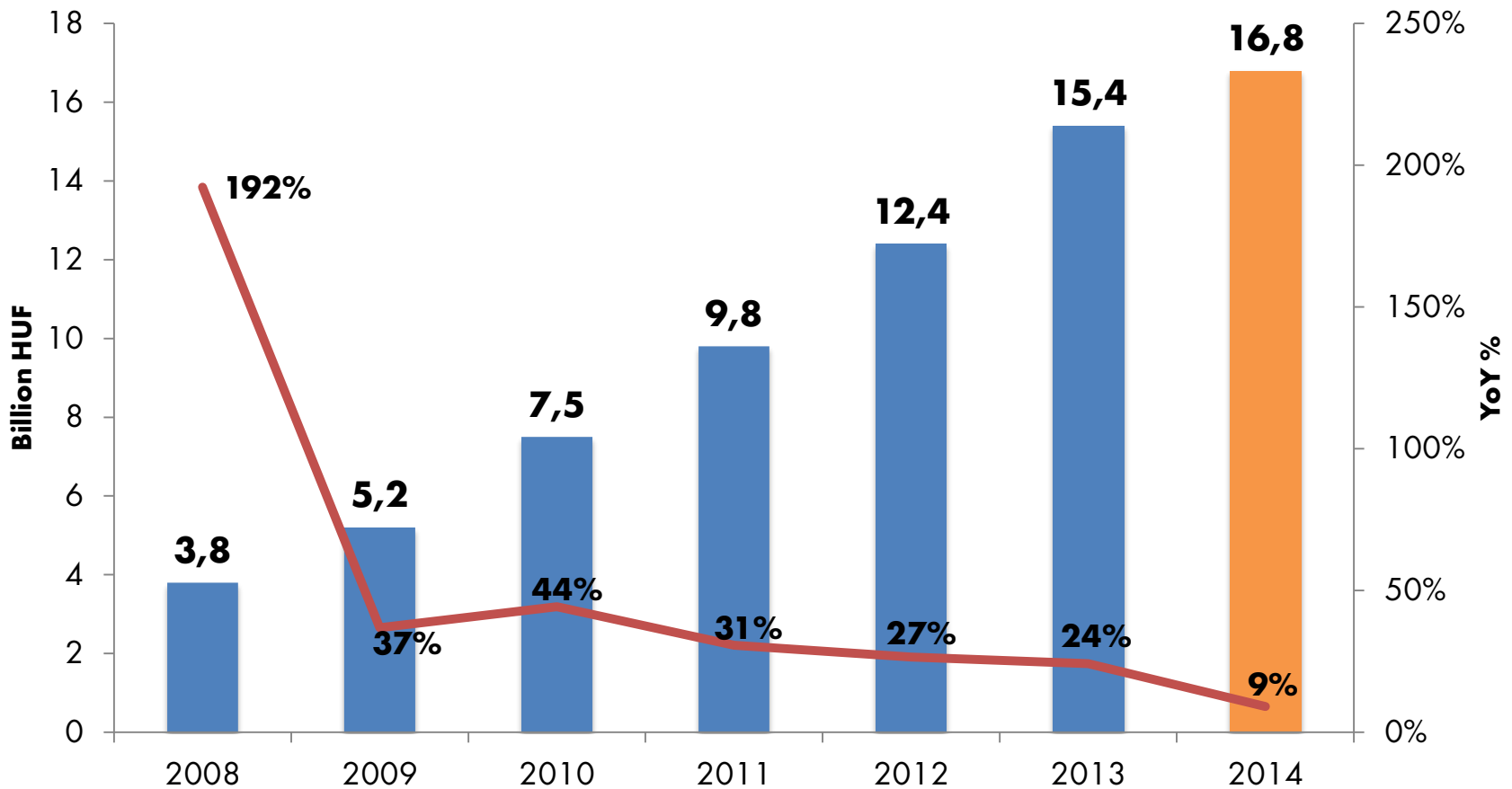
## Trends is display



Net data

# Search (web): decreasing growth

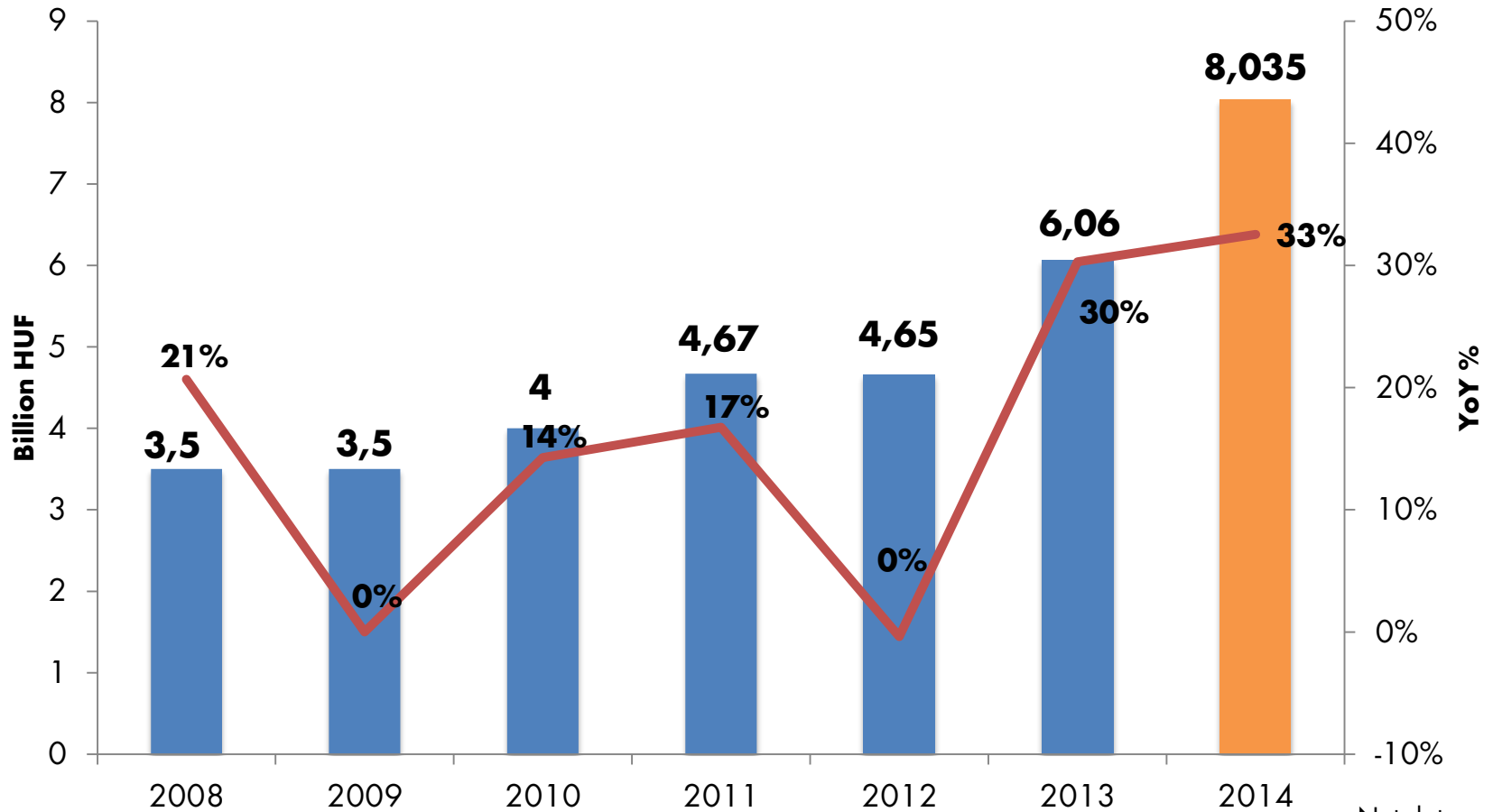
## Search Trends



Net data

# Listing – strong growth

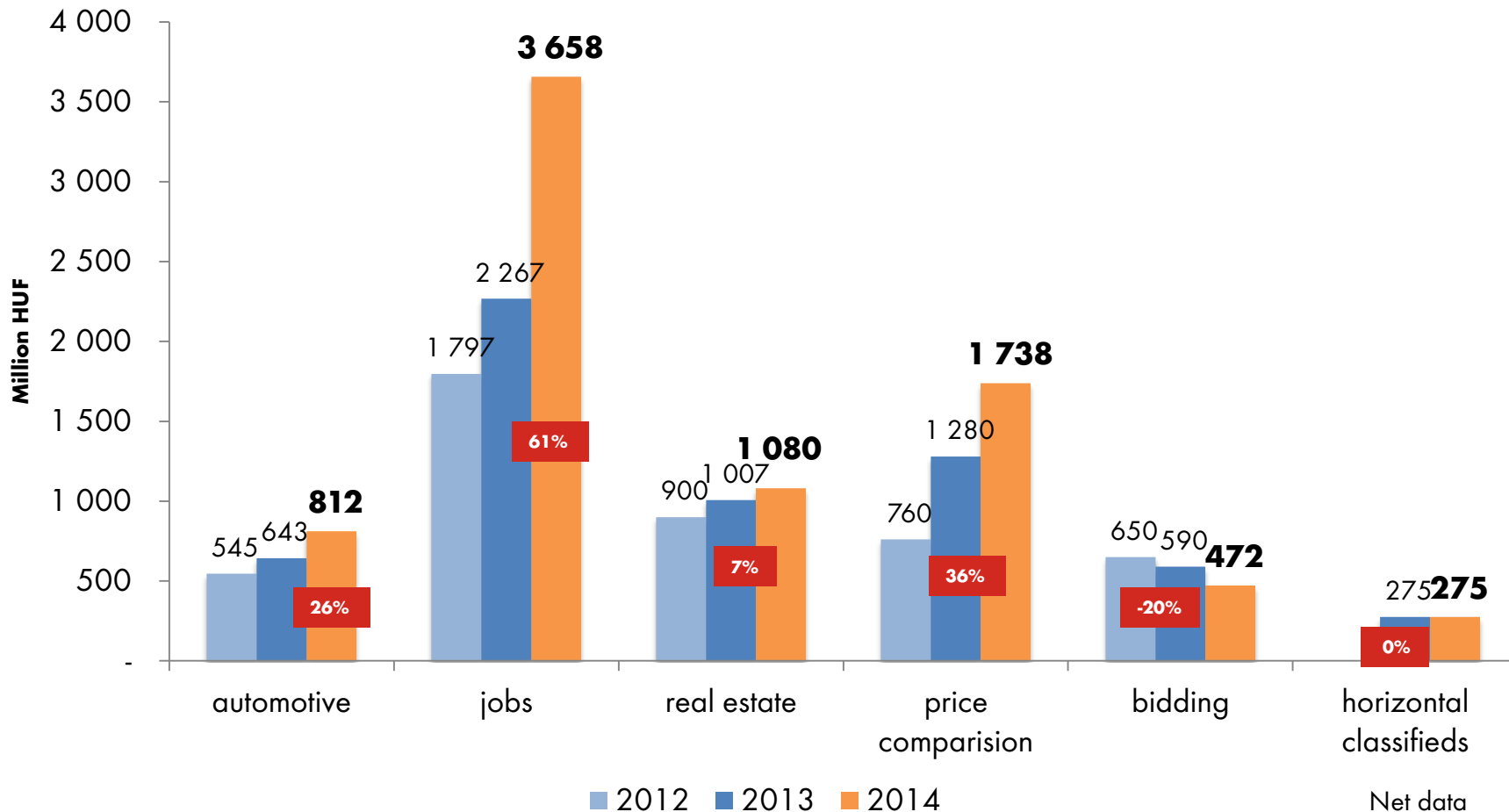
## Listing trends



Net data

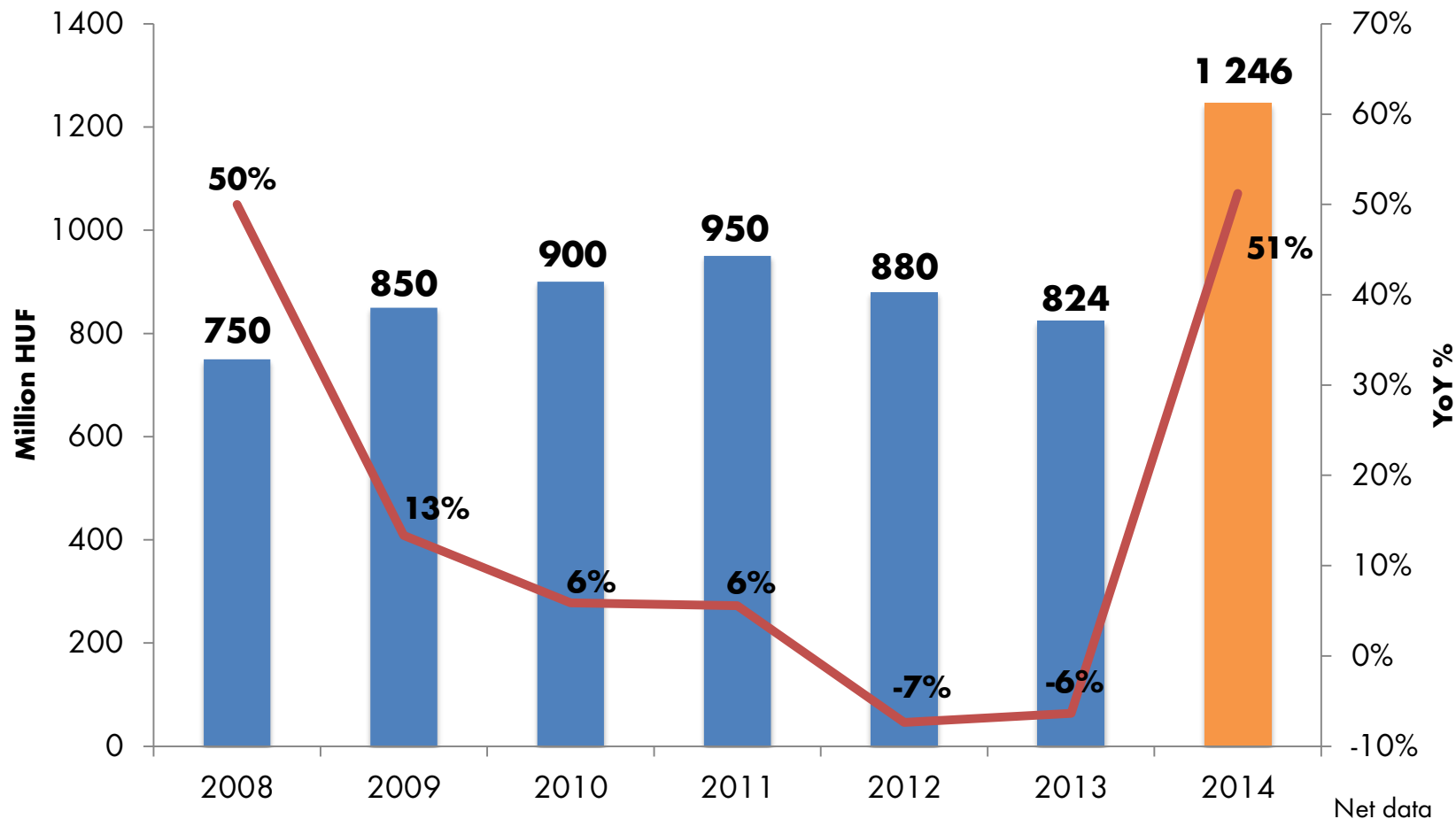
# ... that is driven by jobs sites and the e-comm related price comparison sites

## Change in listing subsegments



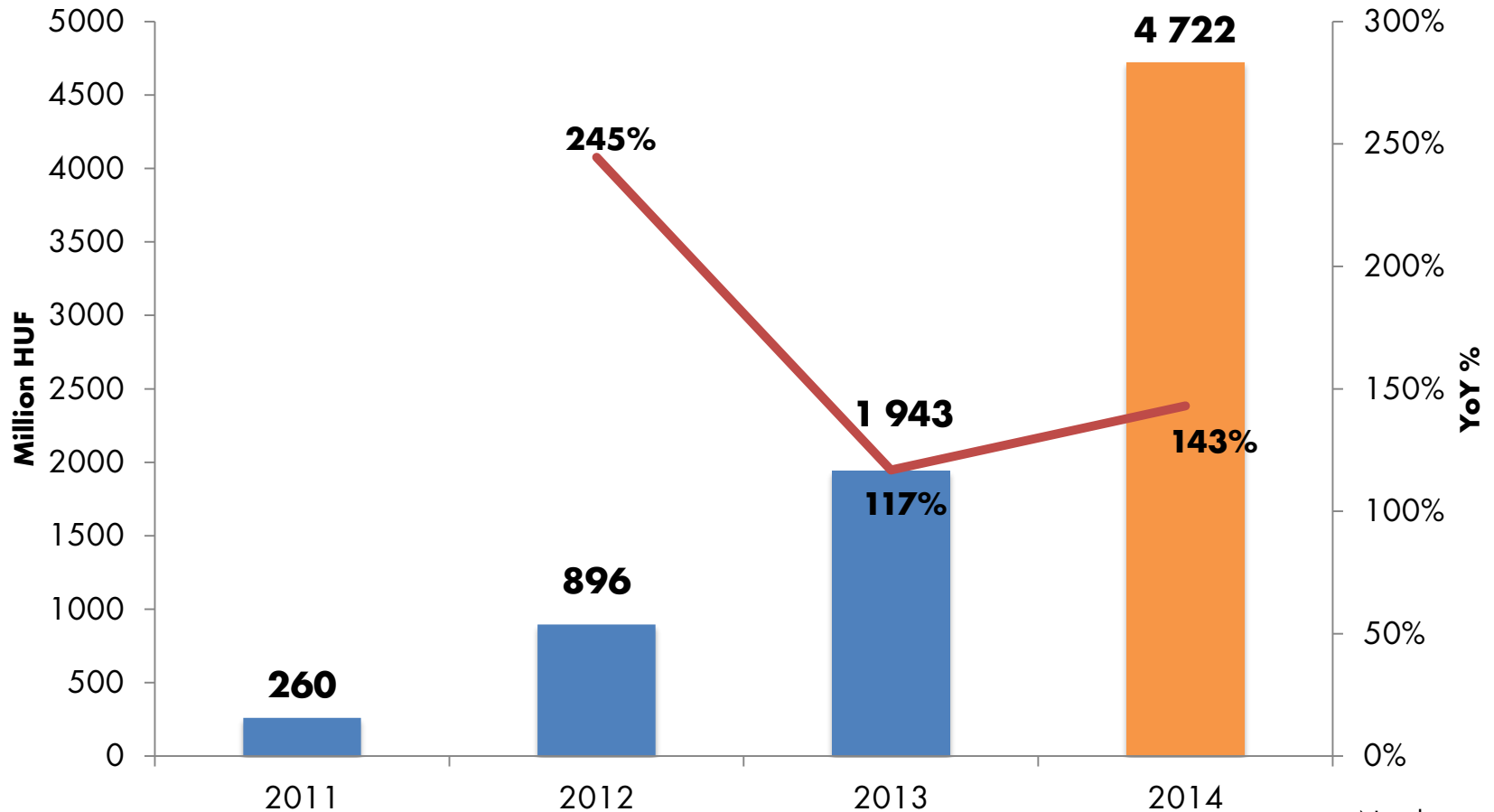
# E-mail marketing newly found growth

## eDM trends



# Mobile – huge growth

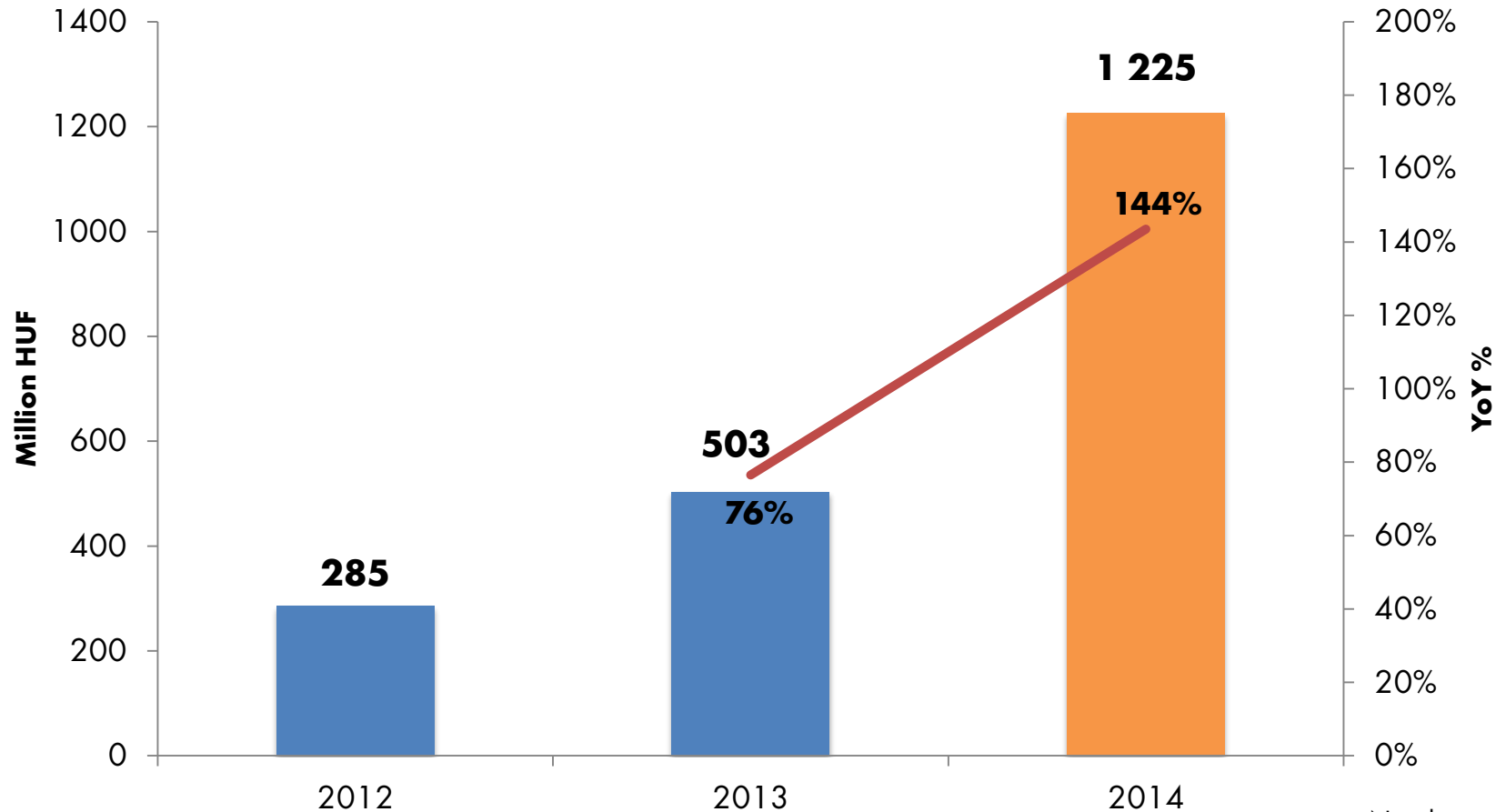
## Mobile advertising trends



Net data

# Ads in video - strong growth

## Ads in video trends



Net data



# Programmatic

**Programmatic display spend**

**4 388m HUF**

**RTB (Real Time Bidding)**

**85m HUF**

**Non-RTB**

**4 303m HUF**

## **Programmatic display spend:**

All media buy that is done through an automated/programmatic technology platform.

Consists of:

- **RTB (Real Time Bidding):**

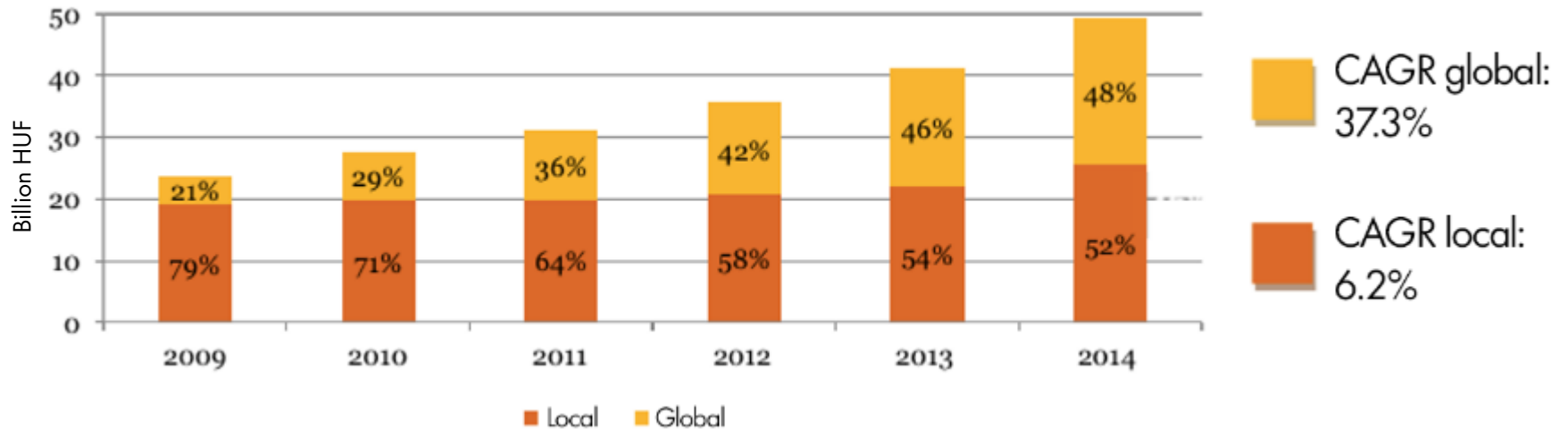
All spend where the price is set in a real time bidding process.

- **Non-RTB:**

All display spend that is automated but the price is not determined by a real time bidding process

Net data

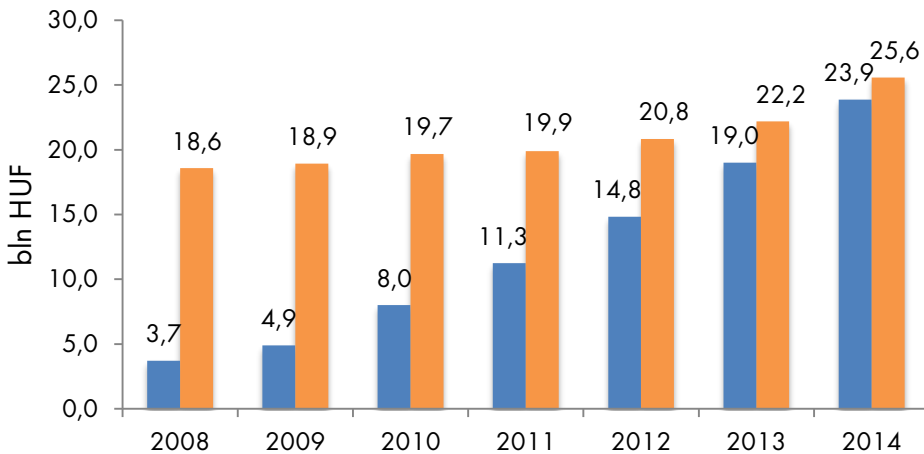
# Local – global trends



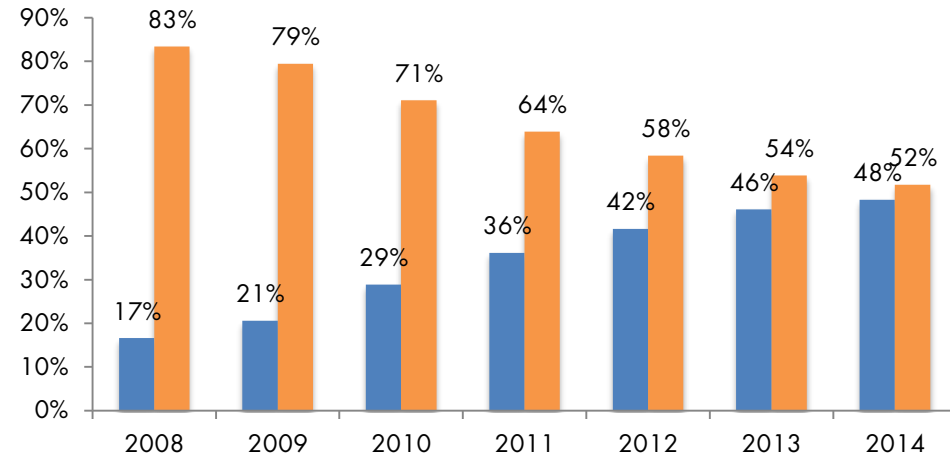
Net data

# Local – global trends

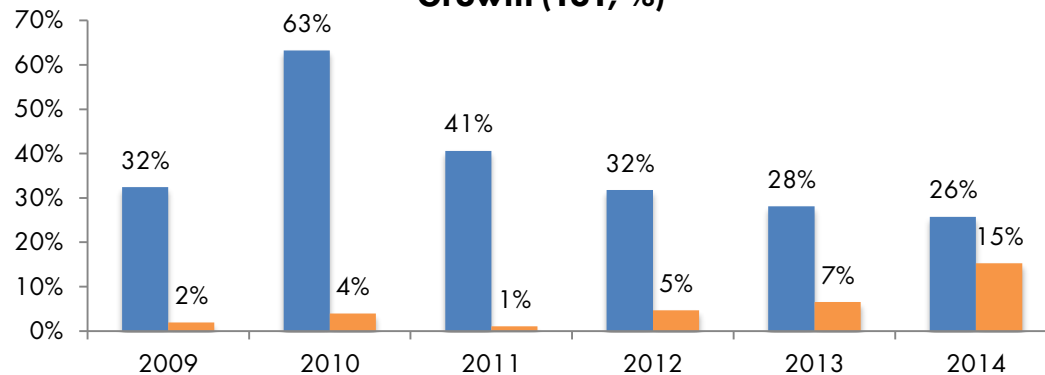
## Local vs. global ad spend



## Market share of local and global players



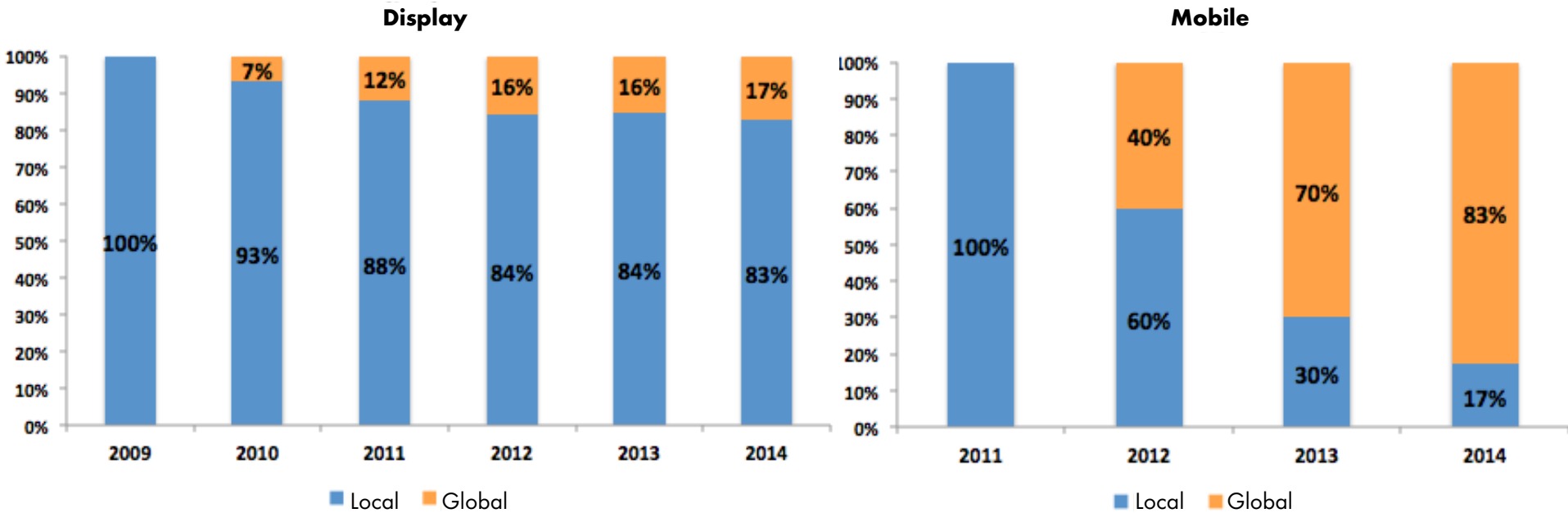
## Growth (YoY, %)



■ global ■ local

Net data

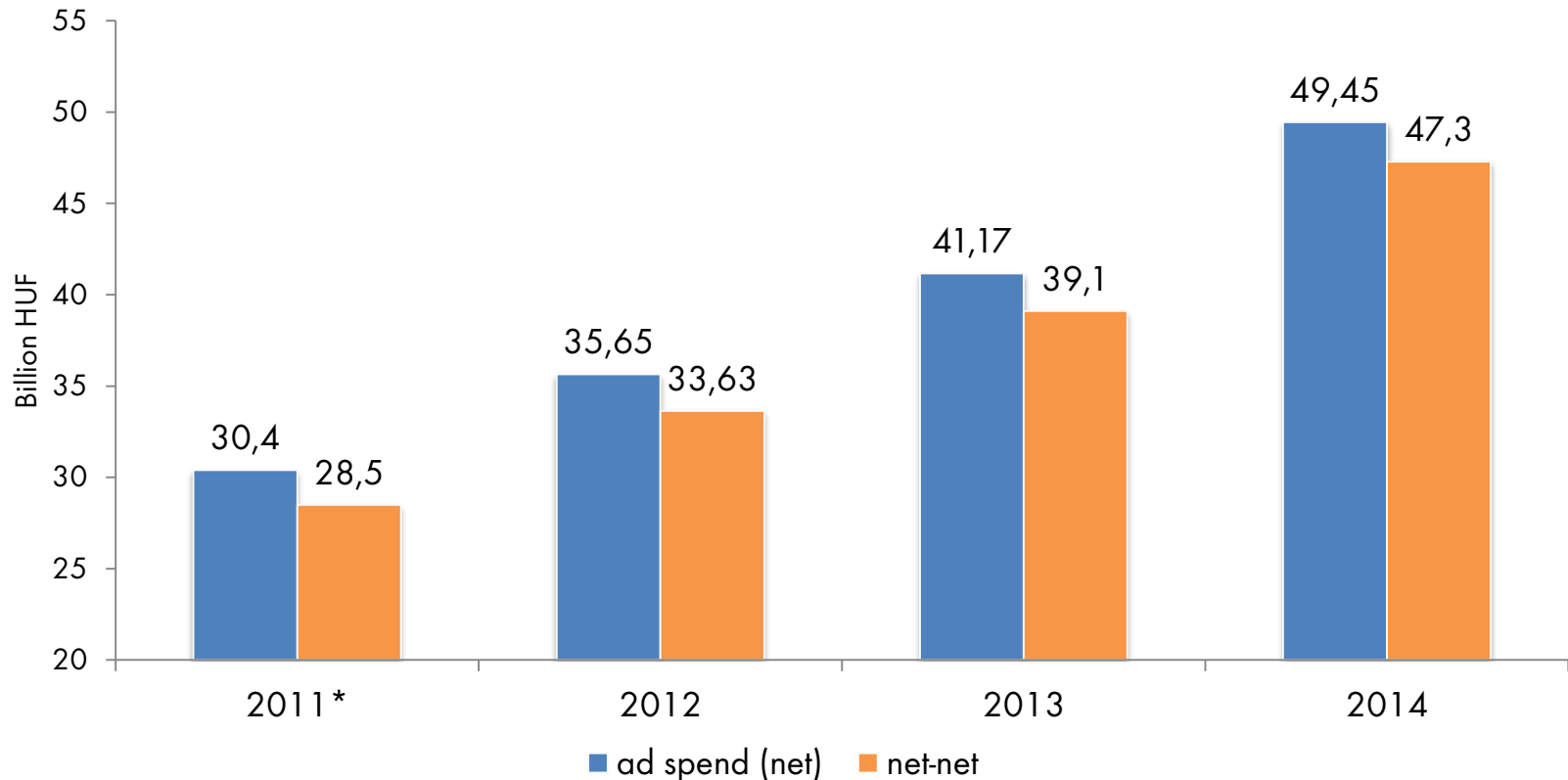
# Local – global trends



Net data

# Net-net: 47,3 billion HUF

## Digital ad spend vs ad revenue (net vs net-net)



\*2011: online, 2012-2014: digital (online+mobile). This net-net data is used for the Hungarian Advertising Association's (MRSZ) ad spend study (Reklámtorta).

# **IAB Hungary Adex 2014**

## **Appendix**

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# Thanks for their contribution:

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- Adaptive Media, Allegroup, Arkon, CEMPSH, Centrál Média csoport, Est Media Group, EVO Media, Gmedia, Grabowski Digital, Használtautó, Híreső, HVG Kiadó, HWSW, Infinity, Jaguar Média, Lapcom Média, Madhouse, Magyar Jeti, Mediaworks Hungary, MTM-SBS, MTVA Online, Net Média, Nosalty, Optimusz Direkt Marketing, Origo Media Group, Reach Media, Ringier Axel Springer Magyarország, Russmedia, R-Time, Schibsted, Thinkdigital
- Dentsu Aegis Network (Dentsu Aegis Network, Carat, Vizeum, Kirowski Isobar), MAGNA (UM, Initiative, BPN, Fastbridge, Café, PM Digital, Panmedia), Maximize Médiaügynökség, Maxus Hungary Reklámszolgáltatások, Mito Communications, OMG (OMD, PHD, GFMO), MEC Hungary, MEC Interaction Hungary, Media Insight Médiaügynökség, MediaCom Magyarország Kft., METs Hungary Médiaügynökség, Mindshare Médiaügynökség, Team Red Media, Vivaki (Starcom MediaVest, ZenithOptimedia), Watch Digital
- ... and other industry experts.

# Digital ad market 2012-2014

In this chart mobile ad spend is in a separate category

## Market size estimation

	2013 spend		2014 spend		Change	Share
<b>Web display</b>	<b>16 943</b>	<b>mln HUF</b>	<b>18 645</b>	<b>mln HUF</b>	<b>10%</b>	<b>38%</b>
<b>Web search</b>	<b>15 400</b>	<b>mln HUF</b>	<b>16 800</b>	<b>mln HUF</b>	<b>9%</b>	<b>34%</b>
<b>Listings</b>	<b>6 062</b>	<b>mln HUF</b>	<b>8 035</b>	<b>mln HUF</b>	<b>33%</b>	<b>16%</b>
1. Vertical	3 917	mln HUF	5 550	mln HUF	42%	11%
Automotive	643	mln HUF	812	mln HUF	26%	2%
Job	2 267	mln HUF	3 658	mln HUF	61%	7%
Real estate	1 007	mln HUF	1 080	mln HUF	7%	2%
2. Price comparison	1 280	mln HUF	1 738	mln HUF	36%	4%
3. Auction/Bid	590	mln HUF	472	mln HUF	-20%	1%
4. Horizontal	275	mln HUF	275	mln HUF	0%	1%
<b>E-mail</b>	<b>824</b>	<b>mln HUF</b>	<b>1 246</b>	<b>mln HUF</b>	<b>51%</b>	<b>3%</b>
<b>Mobile</b>	<b>1 943</b>	<b>mln HUF</b>	<b>4 722</b>	<b>mln HUF</b>	<b>143%</b>	<b>10%</b>
<b>Sum</b>	<b>41 171</b>	<b>mln HUF</b>	<b>49 448</b>	<b>mln HUF</b>	<b>20%</b>	<b>100%</b>

Net data



# Digital ad spend 2012-2014

Mobile ad spend is in Display and in Search categories

	2013 spend		2014 spend		Change	Share
<b>Display</b>	18 165	mln HUF	20 962	mln HUF	15%	42%
<b>Search</b>	16 121	mln HUF	19 191	mln HUF	19%	39%
<b>Listings</b>	6 062	mln HUF	8 035	mln HUF	33%	16%
<b>E-mail</b>	824	mln HUF	1 246	mln HUF	51%	3%
<b>Sum</b>	<b>41 171</b>	<b>HUF</b>	<b>49 433</b>	<b>mln HUF</b>	<b>20%</b>	<b>100%</b>

Net data

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# IAB Hungary

The trade association for digital media and advertising

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Professionalise



Promote



Protect



Prove

