
Global Data Market Size

2017–2019



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Foreword



Piotr Prajsnar
Chief Executive Officer
Cloud Technologies



It is the second edition of our “Global Data Market Size” report and it shows that the need for digital information is growing rapidly. As a Cloud Technologies Group and owner of one of the world’s largest data warehouses, we observe the growth of data market since 2011, when we started to operate. Data market is growing dynamically and data-driven economy is not an idea any more. It’s a fact now and the need for high-quality data is greater than ever. The growth of the market depends not only on quantity, but also the quality of data and industry representatives are aware of it.

In 2019 the global data market will reach \$26 billion, which is more than the whole US programmatic market value in 2016. The US data market, which is world’s largest, is growing fast, but of course much slower than emerging markets, such as India or Russia and slower than European markets (France, Germany, Italy). Marketers should focus on China data market - with a growth rate of 95.5% in 2018 it will become the second largest market in the world in 2019.

Just like in the first edition of our report, this document also includes estimates of display ad spend and programmatic ad spend, so marketers, publishers and data-driven businesses can find really useful data inside.

I invite you to see the results of our analysis for all 23 countries globally. Check how the demand for data is growing.



Maciej Sawa
Chief Executive Officer
OnAudience.com
Cloud Technologies Group



I am proud to present the second report that includes estimates and forecasts for the data, display and programmatic market. The first edition of our study proved that included data is really useful - our analysis and estimates were cited by the representatives of the digital industry.

OnAudience.com is one of the world’s largest data warehouses. Digital information is crucial for our business, so we pay close attention to the growth of the data market. All the calculation we made had been prepared for a three-year period: 2017-2019. That perspective clearly shows trends for all the countries we analyzed.

Marketers will spend over \$20 billion on data this year. They know that digital information about users’ behavior, interests and purchase intentions are a fuel for their online marketing activities. Needs for data grow at a double-digit rate globally and in almost all 23 markets that we analyzed. The trend is stable and global. Data is one of the most demanded good in the online industry.

Introduction

Global data market will reach \$26 billion in 2019

The data market is growing fast and in 2019 its value will hit \$26 B globally. Since 2016 the data market is expanding at a double-digit rate, and the rapid growth is strongly connected with dynamic digital advertising market growth and digitization of companies that is advancing very quickly.

The value of digital display advertising market will reach \$120.8 B globally this year according to OnAudience.com study. Zenith's estimates are similar - in the 'Advertising Expenditure Forecasts' we can find that the digital display market value will hit \$112.2 B¹.

Programmatic market also grows rapidly and that model of advertising especially needs data. According to OnAudience.com report, marketers will spend \$75 B on programmatic ads in 2018. What's more, eMarketer study revealed that on US market, which is the world's largest programmatic market with the value of over \$39 B, marketers will spend 81.5% of their digital display budgets on programmatic campaigns this year². Both display and programmatic markets are the petrol that drives the data market.

Despite the introduction of GDPR, that was widely discussed in the digital industry, data market is still growing fast. The information about customers is demanded good for marketers, because it helps prepare highly personalized messages, find the right target group and send them accurate messages at the right moment of their buying journey. It significantly increases the effectiveness of online campaigns. In almost all countries we analyzed, data spend in 2019 will grow at a double-digit rate. The trend of using data is stable and has an international reach.

What's in this report?

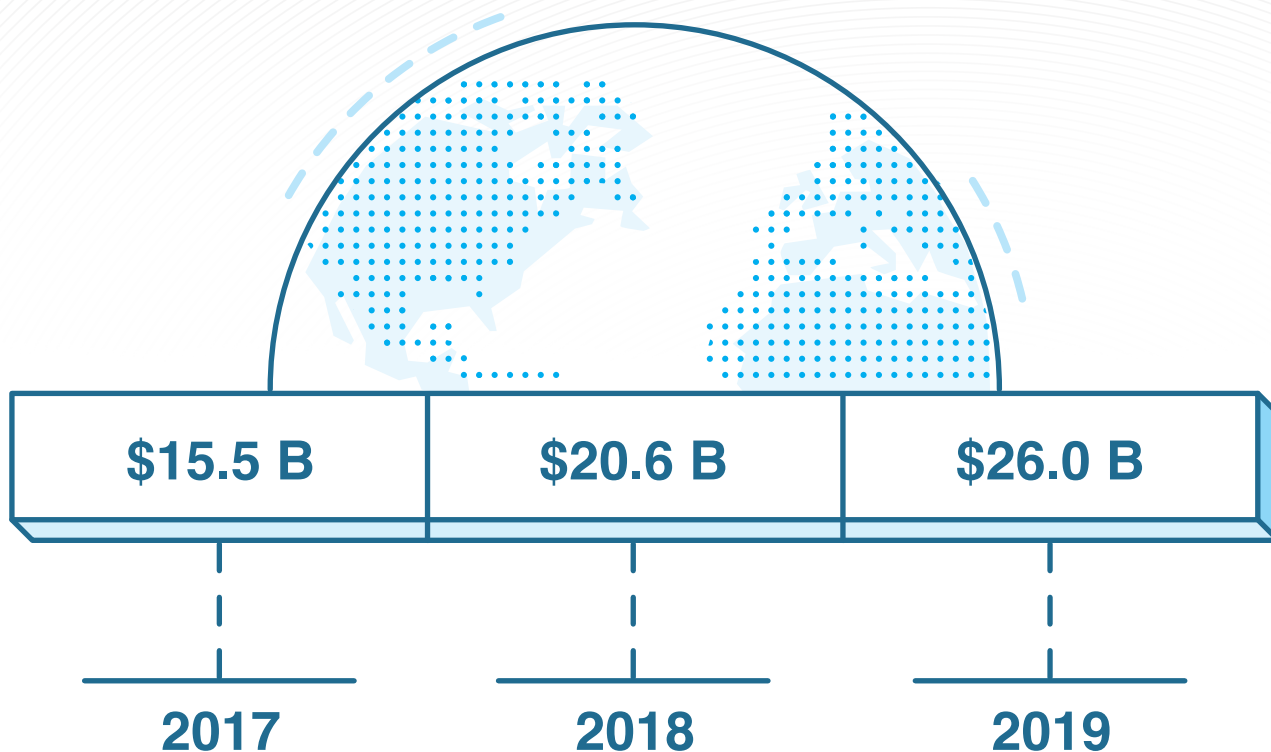
This report includes estimates and a growth rate for worldwide data spending in 23 markets that generates about 90% of the global programmatic spend. The study contains projections for the global data market and for specific countries.

"Global Data Market Size", the report run by OnAudience.com, part of Cloud Technologies Group, also includes estimates of display and programmatic ad spending for a three-year period: 2017-2019.

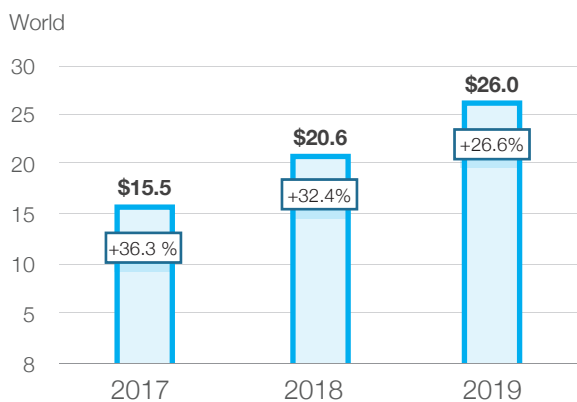
¹Advertising Expenditure Forecasts, Zenithmedia.com, 2018.

²eMarketer Releases New US Programmatic Ad Spending Figures, eMarketer.com, 2017.

Global data market size 2017–2019



Global data market growth 2017–2019 (\$ billions)



Data is a fuel of our century. It can significantly improve data-driven businesses and the effectiveness of online campaigns. That is why the global data market is growing rapidly in double-digit rate. In 2017 its value exceeded \$15 B and in 2018 it will reach \$20.6 B, which is a growth of 32.4%. This upward trend is stable and will continue in 2019 when global spending for data will hit \$26 B.

Key insights

USA

World's largest data market in 2018: \$12.3 B

It will keep its 1st position in 2019 with an estimated value of over \$15.2 B.

Europe

Europe: Data market size in 2018: \$3.2 B

European data market size is growing at a double-digit rate and it will reach \$4.2 B in 2019.

UK

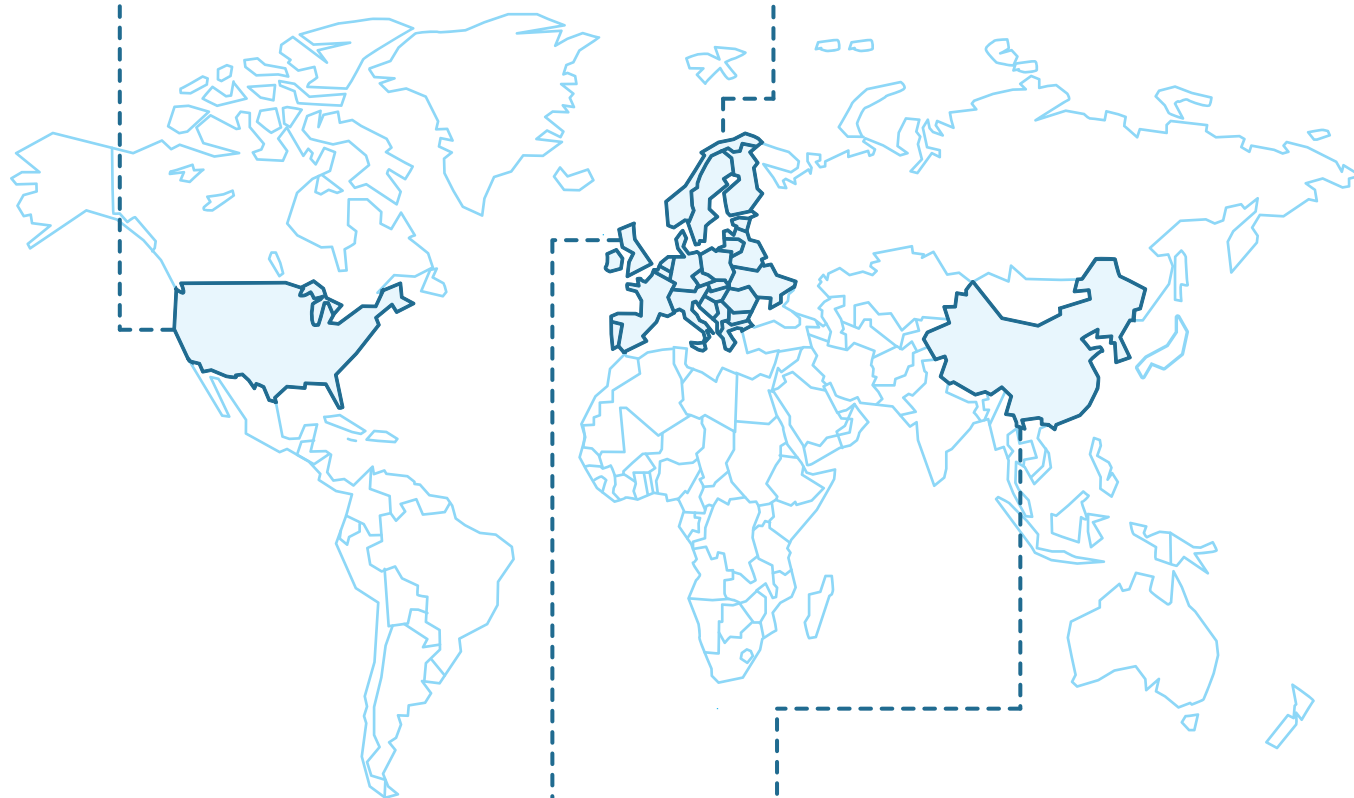
UK: The largest data market in Europe in 2018: \$1.8 B

The UK data market is the world's second largest and in 2019 its value will reach \$2.4 B.

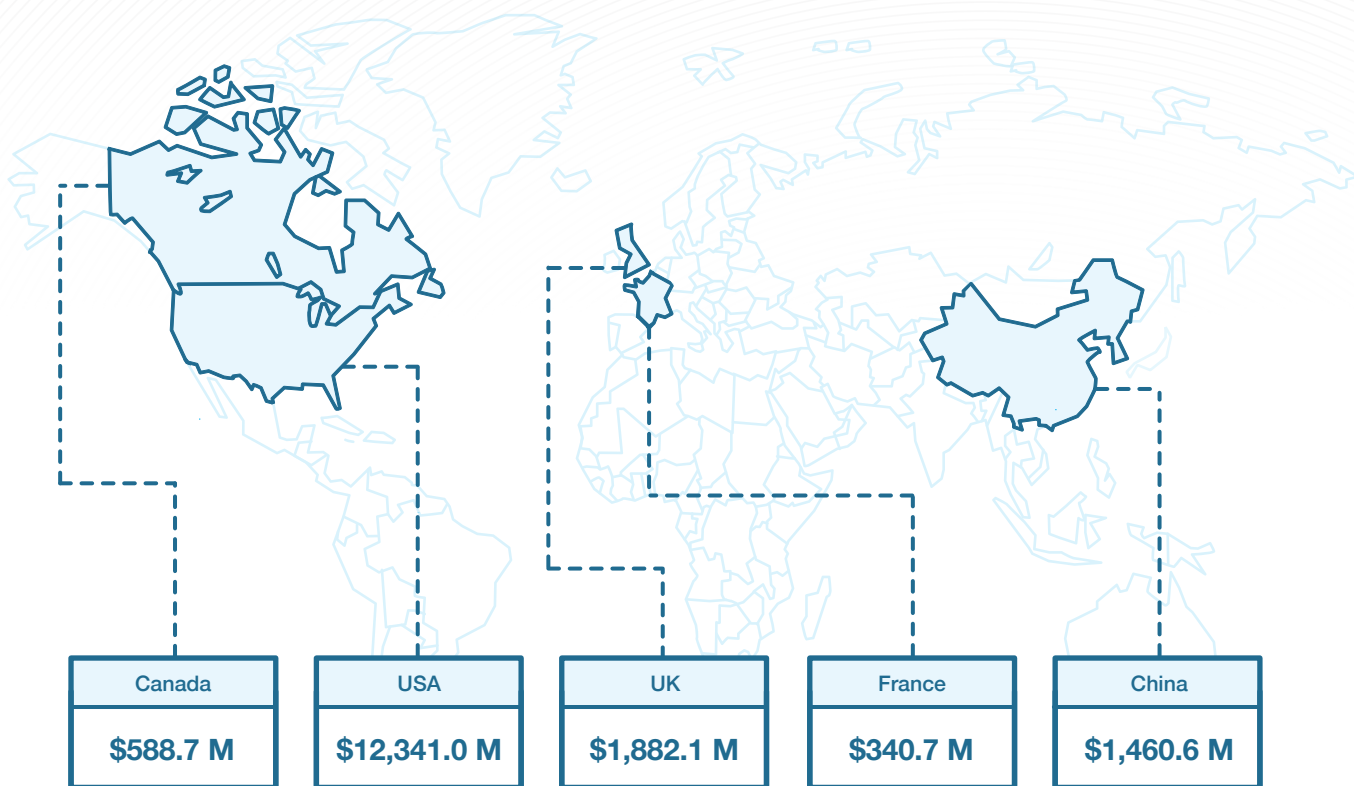
China

China: The highest growth in TOP 5 world's largest data markets: 95.5% (2017-2018)

In 2019 China data market value will exceed \$2.4 B.



TOP 5 world's largest data markets in 2018



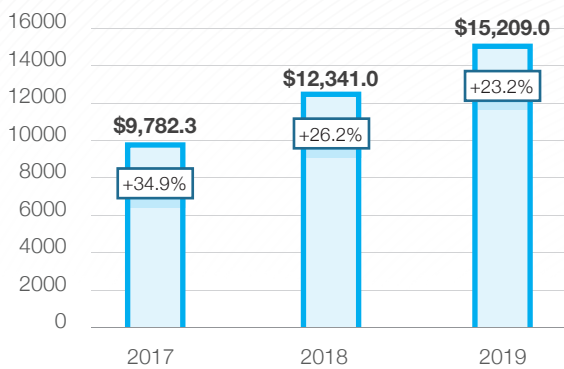
TOP 5 world's largest data markets 2017-2019

Country	2017	% Change	2018	% Change	2019	% Change
USA	\$9,782.3	34.9%	\$12,341.0	26.2%	\$15,209.0	23.2%
UK	\$1,452.4	22.3%	\$1,882.1	29.6%	\$2,354.9	25.1%
China	\$747.2	127.2%	\$1,460.6	95.5%	\$2,392.6	63.8%
Canada	\$453.7	30.1%	\$588.7	29.7%	\$768.8	30.6%
France	\$232.0	56.4%	\$340.7	46.8%	\$469.5	37.8%

Values in millions

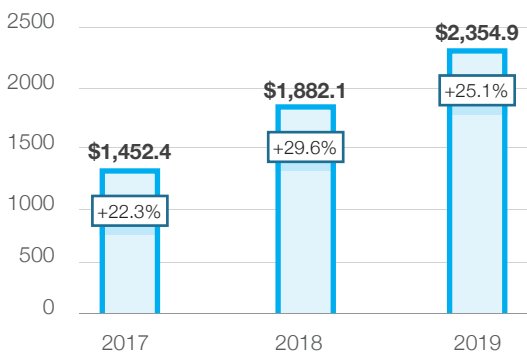
TOP 5 world's largest data markets 2017–2019

Data market size in the **US**
2017–2019 (\$ millions)

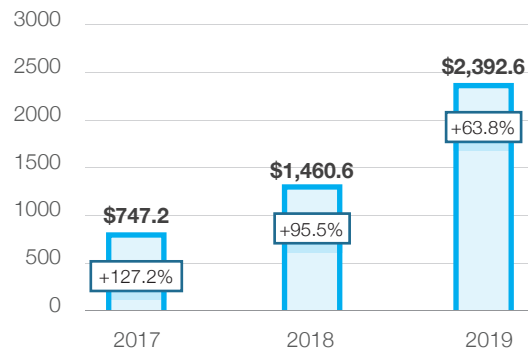


The world's largest data market in 2018 is the US and it will keep its position in 2019. The US marketers will spend \$12.3 B in 2018 on data, which is almost 60% of global data market value. However, China's data market is the fastest growing among TOP 5 world's largest data markets (+95.5% YoY). UK is the second largest data market in 2018, but it will lose its position in 2019, because of expanding China's market.

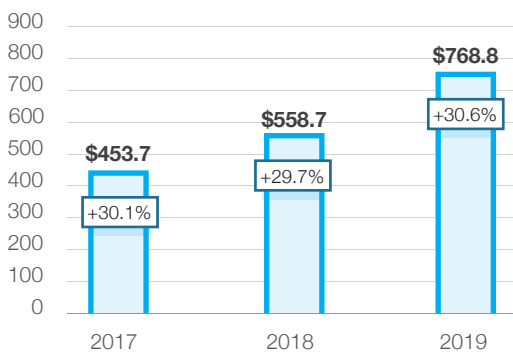
Data market size in the **UK**
2017–2019 (\$ millions)



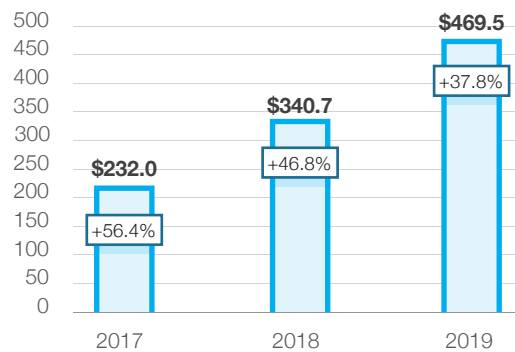
Data market size in **China**
2017–2019 (\$ millions)



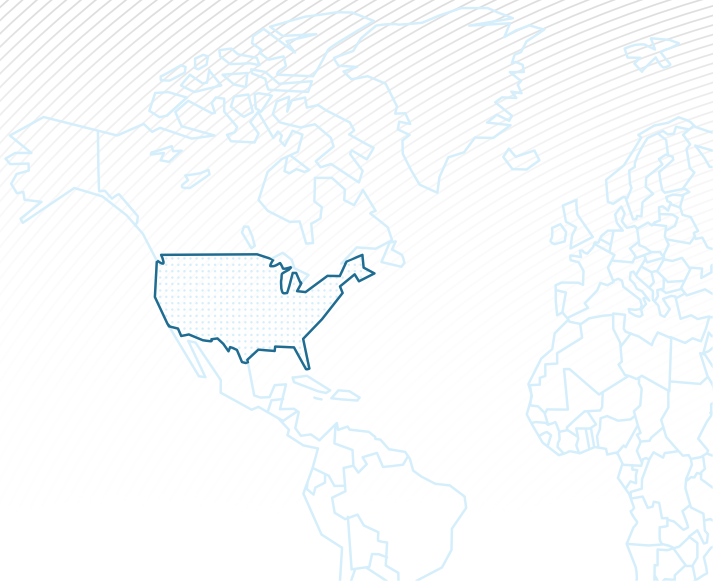
Data market size in **Canada**
2017–2019 (\$ millions)



Data market size in **France**
2017–2019 (\$ millions)



US - the world's largest data and programmatic market **2017–2019**



The US is a hegemon of data and programmatic markets. In 2018 US marketers will spend over \$12 B on data (+32.4% YoY), which is nearly 60% of global data market.

US programmatic market is also the largest in the world and still grows at a double-digit rate. Marketers will spend \$39.1 B dollars on programmatic ads in 2018, which is over half of a programmatic ad spending worldwide.

Data market size in the US 2017–2019

2017		2018		2019	
Value	% Change	Value	% Change	Value	% Change
\$9,782.3	34.9%	\$12,341.0	26.2%	\$15,209.0	23.2%

Values in millions

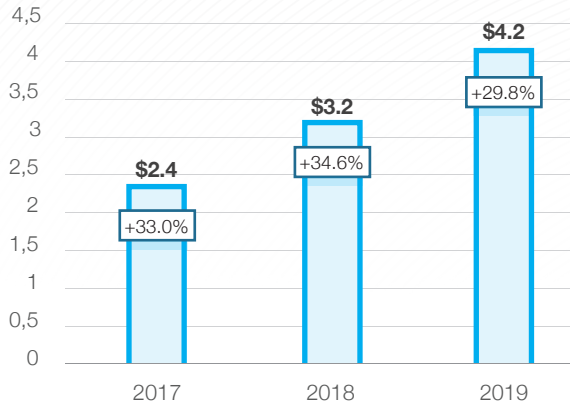
Programmatic market size in the US 2017–2019

2017		2018		2019	
Value	% Change	Value	% Change	Value	% Change
\$32,561.4	27.8%	\$39,102.2	20.1%	\$45,722.1	16.9%

Values in millions

European data market size 2017–2019 and the largest data markets

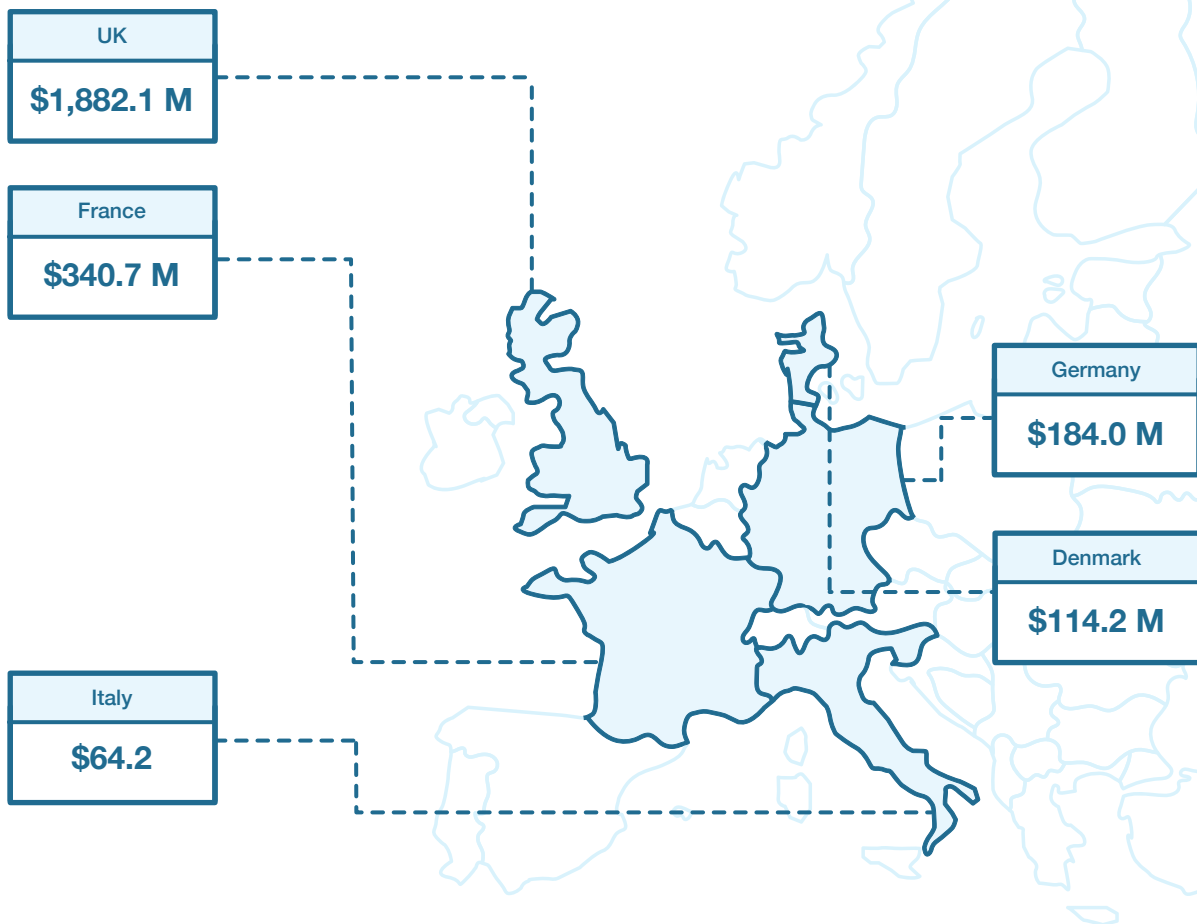
European data market size 2017–2019 (\$ billions)



European data market will reach \$3.2 B in 2018 and is going to grow in double-digit rate (+29.8% YoY) to exceed \$4 B in 2019. UK is the largest data market in Europe with an estimated value of \$1.8 B in 2018.

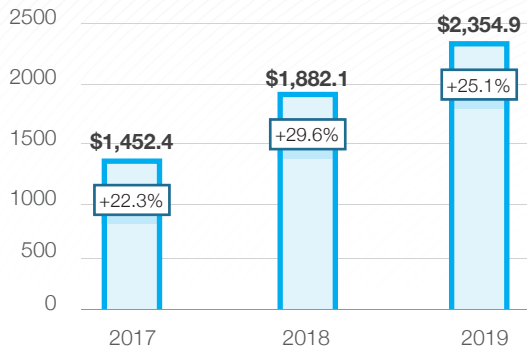
The fastest growing market among the largest data markets in Europe is Germany with over 44% growth rate (2018-2019).

TOP 5 largest data markets in Europe 2018

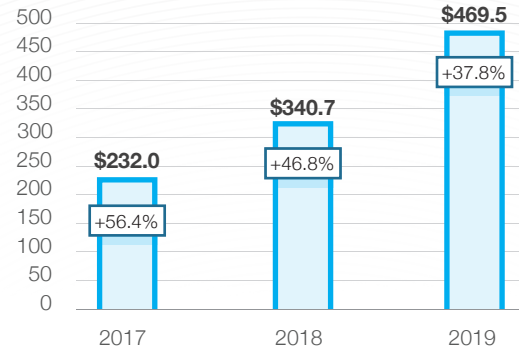


TOP 5 largest data markets in Europe 2017–2019

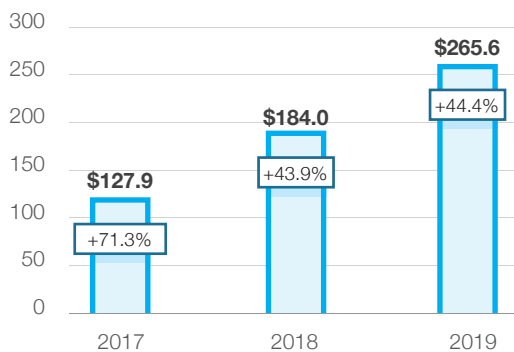
Data market size in **UK**
2017–2019 (\$ millions)



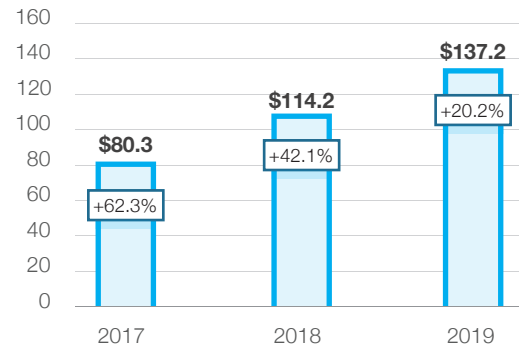
Data market size in **France**
2017–2019 (\$ millions)



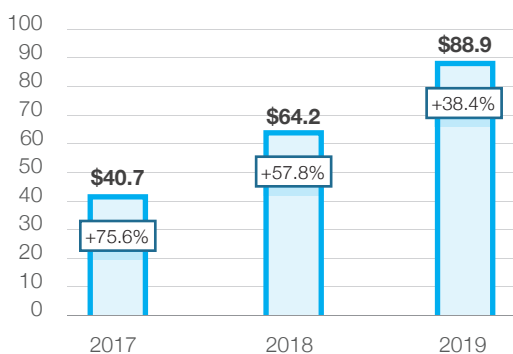
Data market size in **Germany**
2017–2019 (\$ millions)



Data market size in **Denmark**
2017–2019 (\$ millions)



Data market size in **Italy**
2017–2019 (\$ millions)



UK - the largest data and programmatic market in Europe **2017–2019**



The UK data market is the largest in Europe and the second largest market in the world. In 2018 it will reach \$1.8 B (+26.2% YoY) and it will continue to grow at a double-digit rate in 2019, but it will lose its second position in the world, because of fast-growing China data market.

The programmatic market size in the UK is definitely the largest in Europe. With the value of \$5.7 B in 2018 (+16.8% YoY), it leaves other European markets far behind.

Data market size in the UK 2017–2019

2017		2018		2019	
Value	% Change	Value	% Change	Value	% Change
\$1,452.4	22.3%	\$1,882.1	29.6%	\$2,354.9	25.1%

Values in millions

Programmatic market size in the UK 2017–2019

2017		2018		2019	
Value	% Change	Value	% Change	Value	% Change
\$4,897.7	15.8%	\$5,718.8	16.8%	\$6,571.1	14.9%

Values in millions



Global data spend
2017–2019

Global data spend
2017-2019

Country	2017		2018		2019	
	Data Value	% Change	Data Value	% Change	Data Value	% Change
Australia	\$102.5	104.3%	\$220.6	115.3%	\$327.6	48.5%
Austria	\$10.3	127.6%	\$24.5	137.5%	\$54.3	121.4%
Canada	\$453.7	30.1%	\$588.7	29.7%	\$768.8	30.6%
China	\$747.2	127.2%	\$1,460.6	95.5%	\$2,392.6	63.8%
Colombia	< \$0.1	—	\$0.1	78.5%	\$0.1	43.6%
Denmark	\$80.3	62.3%	\$114.2	42.1%	\$137.2	20.2%
France	\$232.0	56.4%	\$340.7	46.8%	\$469.5	37.8%
Germany	\$127.9	71.3%	\$184.0	43.9%	\$265.6	44.4%
Hungary	\$0.6	351.5%	\$1.3	121.7%	\$2.1	59.7%
India	\$6.3	82.3%	\$11.0	75.3%	\$24.5	122.0%
Ireland	\$11.4	31.6%	\$16.5	44.9%	\$26.4	59.3%
Italy	\$40.7	75.6%	\$64.2	57.8%	\$88.9	38.4%
Netherlands	\$42.1	19.5%	\$40.9	-2.7%	\$47.7	16.6%
New Zealand	\$12.2	—	\$17.5	43.4%	\$24.6	40.7%
Poland	\$11.9	77.5%	\$21.0	77.1%	\$37.2	76.9%
Romania	\$1.2	—	\$1.7	38.6%	\$3.8	123.6%
Russia	\$24.4	84.1%	\$34.2	39.8%	\$73.3	114.6%
Slovakia	\$1.0	113.5%	\$1.9	86.5%	\$3.4	77.3%
Spain	\$14.4	36.7%	\$20.0	38.7%	\$27.1	35.7%
Sweden	\$44.3	143.2%	\$63.8	44.1%	\$82.0	28.5%
Switzerland	\$6.1	301.2%	\$21.8	256.3%	\$41.6	90.6%
United Kingdom	\$1,452.4	22.3%	\$1,882.1	29.6%	\$2,354.9	25.1%
USA	\$9,782.3	34.9%	\$12,341.0	26.2%	\$15,209.0	23.2%
Global	\$15,533.3	36.3%	\$20,571.7	32.4%	\$26,035.8	26.6%

Values in millions



Global display ad spend
and programmatic ad spend
2017–2019

Global display ad spend and programmatic ad spend
2017-2019

Country	2017				2018				2019			
	Display Value	% Change	Programmatic Value	% Change	Display Value	% Change	Programmatic Value	% Change	Display Value	% Change	Programmatic Value	% Change
Australia	\$2,182.0	13.3%	\$761.9	53.1%	\$2,447.0	12.1%	\$1,180.8	55.0%	\$2,712.5	10.9%	\$1,494.4	26.6%
Austria	\$328.3	11.1%	\$93.8	60.0%	\$344.7	5.0%	\$147.7	57.5%	\$359.9	4.4%	\$221.6	50.0%
Canada	\$1,799.0	13.5%	\$1,455.8	22.3%	\$2,019.3	12.2%	\$1,752.2	20.4%	\$2,221.2	10.0%	\$2,071.7	18.2%
China	\$23,774.5	28.1%	\$6,791.6	71.6%	\$29,738.5	25.1%	\$10,591.5	55.9%	\$35,300.5	18.7%	\$14,570.0	37.6%
Colombia	\$99.2	11.2%	\$3.2	212.3%	\$107.7	8.5%	\$4.4	38.8%	\$119.1	10.6%	\$5.5	24.3%
Denmark	\$425.4	13.0%	\$297.9	36.3%	\$464.1	9.1%	\$369.9	24.2%	\$486.5	4.8%	\$409.6	10.7%
France	\$1,537.2	13.8%	\$962.4	34.2%	\$1,761.0	14.6%	\$1,244.8	29.3%	\$2,023.1	14.9%	\$1,545.1	24.1%
Germany	\$2,734.8	18.3%	\$953.0	43.3%	\$3,206.2	17.2%	\$1,234.4	29.5%	\$3,980.6	24.2%	\$1,630.2	32.1%
Hungary	\$100.3	10.8%	\$12.5	125.0%	\$110.0	9.7%	\$19.5	55.6%	\$117.0	6.3%	\$25.1	28.6%
India	\$637.2	30.2%	\$102.0	55.0%	\$789.2	23.9%	\$149.9	47.0%	\$987.0	25.1%	\$246.4	64.4%
Ireland	\$233.0	21.3%	\$83.1	27.1%	\$264.4	13.5%	\$106.3	27.9%	\$291.6	10.3%	\$139.0	30.8%
Italy	\$1,461.4	8.9%	\$393.0	39.1%	\$1,578.5	8.0%	\$511.8	30.2%	\$1,686.8	6.9%	\$613.9	20.0%
Netherlands	\$838.7	9.2%	\$302.7	14.9%	\$905.7	8.0%	\$309.4	2.2%	\$958.2	5.8%	\$339.1	9.6%
New Zealand	\$198.8	15.4%	\$79.3	211.3%	\$221.8	11.6%	\$100.0	26.1%	\$246.9	11.3%	\$123.4	23.5%
Poland	\$493.6	12.9%	\$123.4	42.4%	\$552.6	12.0%	\$173.3	40.4%	\$610.4	10.5%	\$238.9	37.9%
Romania	\$45.3	25.0%	\$12.1	300.0%	\$51.3	13.3%	\$15.1	25.0%	\$60.4	17.6%	\$24.2	60.0%
Russia	\$696.2	7.7%	\$210.2	41.7%	\$797.6	14.6%	\$265.2	26.2%	\$909.2	14.0%	\$409.2	54.3%
Slovakia	\$89.7	14.3%	\$15.4	57.1%	\$102.3	14.1%	\$22.4	45.5%	\$112.1	9.6%	\$30.8	37.5%
Spain	\$882.2	5.4%	\$181.5	20.8%	\$972.8	10.3%	\$223.9	23.3%	\$1,094.9	12.5%	\$273.0	21.9%
Sweden	\$596.4	7.8%	\$261.9	62.9%	\$634.8	6.4%	\$323.5	23.5%	\$683.2	7.6%	\$375.2	16.0%
Switzerland	\$237.9	3.9%	\$61.5	105.4%	\$244.4	2.7%	\$117.3	90.8%	\$255.7	4.6%	\$163.5	39.3%
UK	\$6,360.8	8.3%	\$4,897.7	15.8%	\$6,728.4	5.8%	\$5,718.8	16.8%	\$7,294.9	8.4%	\$6,571.1	14.9%
USA	\$41,741.8	19.6%	\$32,561.4	27.8%	\$47,972.7	14.9%	\$39,102.2	20.1%	\$54,686.5	14.0%	\$45,722.1	16.9%
Global	\$104,529.8	17.7%	\$59,540.8	30.5%	\$120,820.6	15.6%	\$74,980.7	25.9%	\$136,602.4	13.1%	\$89,532.4	19.4%

Values in millions

Data market in GDPR era

The General Data Protection Regulations (GDPR) came into force on the 25th May 2018 and for the digital marketing industry it was a big challenge to comply with new regulations. Depending on the case, the same digital information could be considered as a personal data (e.g. IP address, cookie ID) or not, so every organization that process EU citizens' data had to check if they comply with the new rules.

What GDPR changes? In general, it specifies current privacy regulations and in some cases digital footprints collected by companies may be considered as a personal data. Data administrators are also obliged to collect users' consents or to show the legitimate interest to process data for marketing purposes. What's more, consumers must be afforded insight and control into companies' storage and use of their data, so companies must be ready, for example, to generate reports about users' activity or to delete their profiles.

Impact of GDPR on the digital industry

The GDPR is still a hot topic in the digital industry. Media analyzed the negative impact of the new rules on digital advertising, especially programmatic market, which base on data. But currently, after a few months after the new rules came into force, the market situation seems to be stable.

Despite of GDPR, advertisers still invest in programmatic and this market is growing fast. A month after introducing the new privacy rules, expenditures for programmatic started to recover to pre-GDPR levels¹.

According to Zenith's report, in 2017 digital advertising market increased by 13.7% and reached \$204 B². eMarketer's study reveals that US programmatic market will hit \$46 B this year and by 2020, 86.2% of all digital display ads will be bought via automated channels³. Estimates in our reports also shows that both programmatic and data markets are growing fast. Globally marketers will spend over \$20 B on data this year.



Data anonymization process on OnAudience.com Data Exchange



OnAudience.com took a number of steps to make sure that our company process data in compliance with the GDPR. According to GDPR, if personal data is subjected to anonymization process, it cannot be considered as a personal data any more. Data provided by our Data Exchange is automatically anonymized, so we comply with GDPR, which also confirmed legal analysis of our products and services. We use a random alphanumeric identifier for every device, so the people whom the data describe remain anonymous. That kind of data is used for targeting digital campaigns, so providing non personally identifiable information is what programmatic advertisers need to target the right audience in their campaigns.

¹A month after GDPR takes effect, programmatic ad spend has started to recover, Digiday.com, 2018.

²Advertisers invest more in digital to drive brand growth, Zenithmedia.com, 2018.

³US Programmatic Ad Spending Forecast 2018, eMarketer.com, 2018.

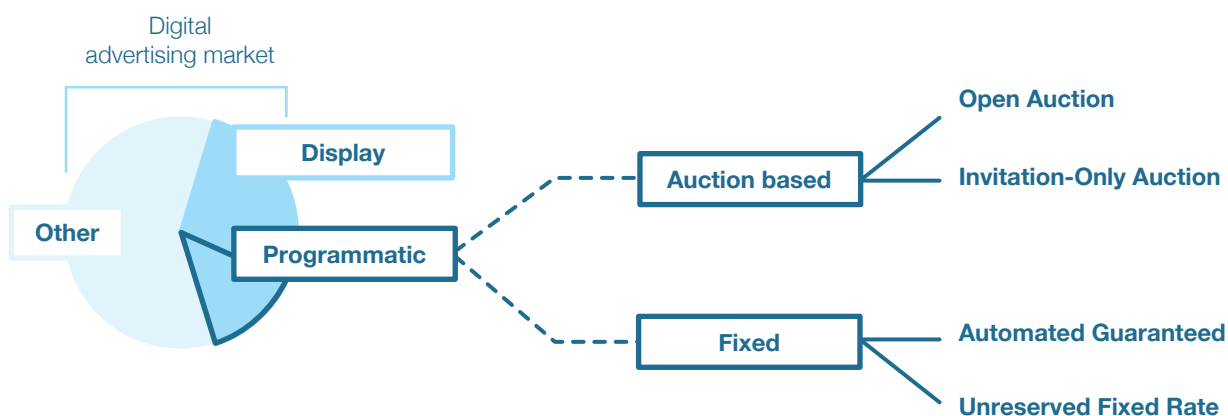
Methodology and sources

Methodology

In the “Global Data Market Size” report we analyzed data from the world’s most important markets, that generates about 90% of the global programmatic ad spend. We made estimates of markets value for which there was available an independent data about the online advertising industry. We’ve also used our own data, know-how and we based on our many years’ business experience. Our statistical model includes digital ad spend, programmatic market share and data usage. It also takes into account the dynamics of the specific markets and includes forecasts of values for the future periods.

The programmatic spend

In this report the programmatic market is treated as a part of display ad market (not including video etc.), which is a part of the whole digital ad market. We treat programmatic market widely, so it includes various models of automated media buying (including RTB and non-RTB)¹.



Global data spend

Our estimation of data market values includes spendings for data that is mainly used for targeting audiences in programmatic advertising. It contains spendings for the 1st, 2nd and 3rd party data and cost of processing data (including costs of DMPs).



¹Programmatic and automation - the publishers' perspective, IAB.com.

About OnAudience.com

OnAudience
.com

Big Data tools and services for digital marketing

OnAudience.com successfully converts Big Data into revenues for advertisers and publishers, offering services and products that effectively enrich and monetize data.

Our company provides over 21 billion user profiles (the number of user profiles is calculated as the product of the total amount of unique users and segments to which they were assigned) from over 200 markets globally, which are mostly used for targeting the right audiences in programmatic campaigns.

Data collected and processed by OnAudience.com enable marketers and firms to run personalized online campaigns and develop Business Intelligence solutions (Data Enrichment).

We are a part of Cloud Technologies Group which specializes in Big Data Marketing and provides solutions for data monetization. The company has unique competencies in optimizing online campaigns based on automated media buying (Programmatic Buying, Real-Time Bidding).

Cloud Technologies is one of the fastest growing tech company in Europe, according to Deloitte Technology Fast 500 EMEA, Deloitte Technology Fast 50 CE and Financial Times 1000: Europe's Fastest Growing Companies.



500 | Technology **Fast 500**
2017 EMEA
Deloitte.

50 | Technology **Fast 50**
2017 CENTRAL EUROPE
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