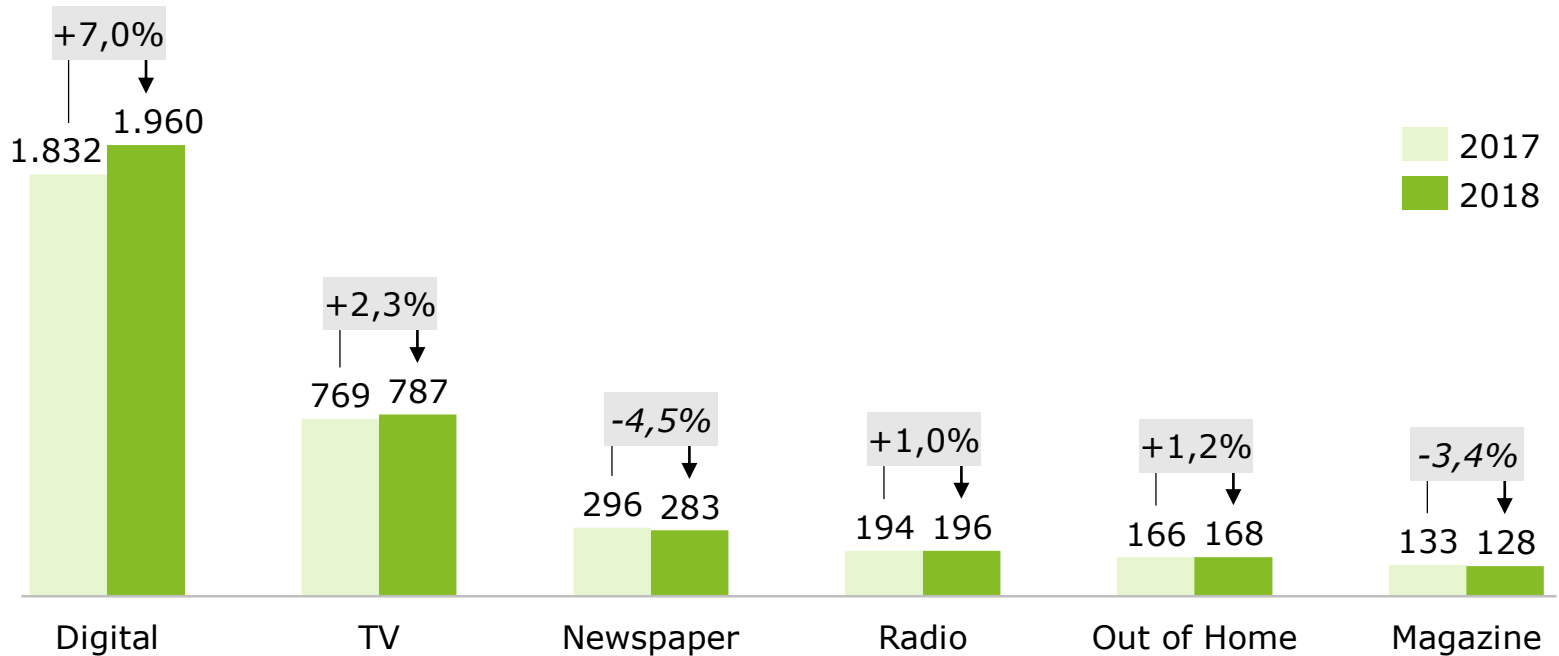


2018 Digital Advertising Spend in the Netherlands – Key figures

Digital Ad Spend continues to grow and outperforms all other media types

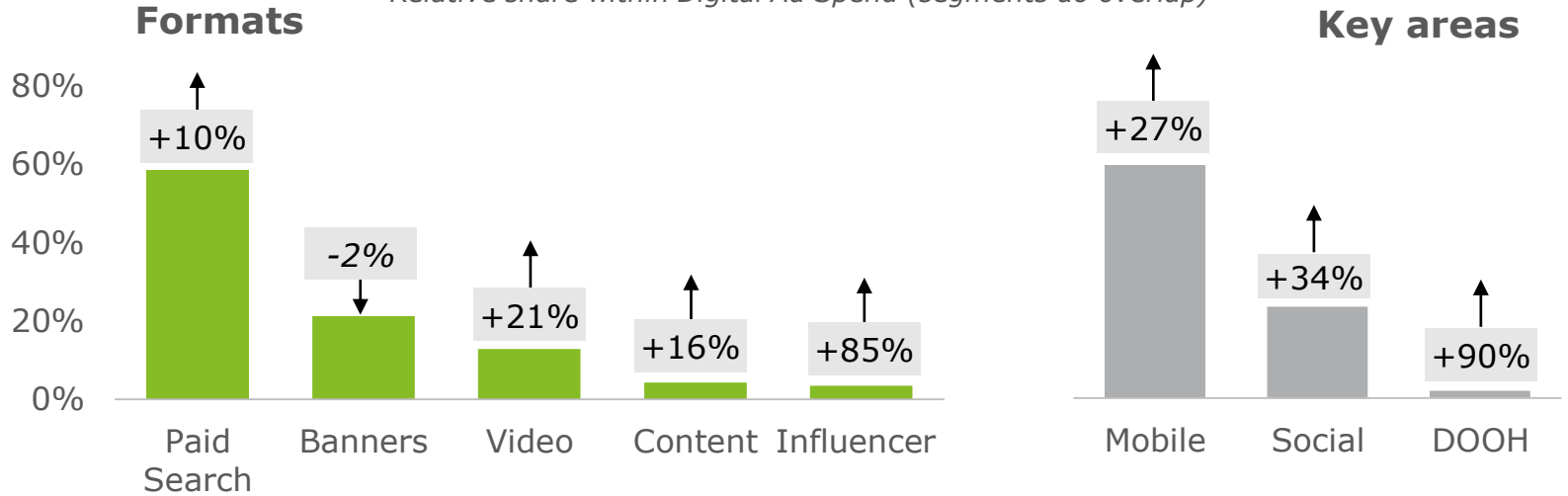
Net Ad Spend (millions/€) and growth 2017/2018 per media type



Paid Search still largest category within total digital Ad Spend

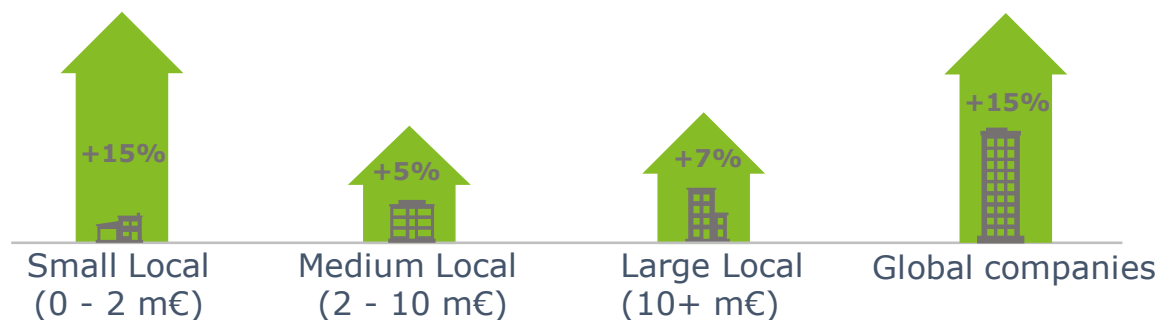
Growth (%) in 2018 for selection of segments in the Digital market

Relative share within Digital Ad Spend (segments do overlap)



Small and Global companies profited most from Digital Growth

Growth percentages of different scales over 2018



Source: Graph 1. RAB, Nielsen, Screenforce, NDP, Survey respondents; Graph 2 & 3 based on digital ad spend survey respondents only.

Methodology: The digital ad spend figures are based on the analysis of data supplied by 25 participating companies (incl. publishers, advertisers, media agencies, ad networks and tech. platforms). The study is conducted independently by Deloitte on behalf of IAB Netherlands. The figures are drawn up on the basis of survey participant input and have not been verified by Deloitte.

* The digital figures we report are net/net figures, meaning that the figures are reported after agency discount that in some cases may apply. To avoid double counting of ad revenue between media types, the digital ad spend is excluded from each media type (e.g. online video / audio / DOOH) and included in the digital ad figures. Global companies include global search and social publishers.