



# Online Display Advertising Report ADEX Q3 2017 Greece

**adex**  
Greece 2017





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# ADEX Hellas, Q3 2017 Objectives & Methodology

- ▶ ADEX Hellas is a standard research project, running every year in Greece, focusing to provide the benchmarks of the Greek online display advertising spending.
- ▶ That research analyzes data on an industry and on a quarter basis.
- ▶ All data in that research are collected by IAB Hellas.
- ▶ The ADEX Hellas survey works according to the pan-European standards collects data from publishers, sales houses and advertising networks.
- ▶ The ADEX Hellas Q3 2017, refers to the advertising revenues reported by 19 publishers and networks vs 22 publishers and networks in the ADEX Hellas 2016.
- ▶ Publishers and networks listed 116 web sites instead of 133 during 2016. These sites are serving mainly the Greek population.
- ▶ Data are reported in nominal (rate card) prices, excluding discounts and agency commissions.
- ▶ The ADEX Hellas survey reports online display advertising only.

## Notes

- ▶ One of the 19 publishers provided data only for the total market and not for the 21 sectors separately .
- ▶ Three other publishers did not provide any data because they are in a “shareholder transition” phase.



# ADEX Hellas, Q3 2017 ADEX Hellas Q3 2017 Timeline

mio€	Q1	Q2	H1	Q3	YTD	Q4	YEAR
2007	4,4	8,6	13	7,8	20,8	9,7	30,5
2008	6,7	11	17,7	8,9	26,6	13,3	39,9
2009	10,4	14,1	24,5	13,3	37,8	20	57,8
2010	11,4	18,2	29,6	14,8	44,4	17,6	62
2011	15,9	23,9	39,8	16,7	56,5	19,9	76,4
2012	14,1	22,5	36,6	16,6	53,2	22,9	76,1
2013	12,4	20,8	33,2	17,2	50,4	24,7	75,1
2014	13	21,6	34,6	17,1	51,7	27,6	79,3
2015	11,8	18,8	30,6	14,2	44,8	23,5	68,3
2016	13	21,5	34,5	19,0	53,5	23,4	77
2017	11,6	18,2	29,8	13,7	43,5		

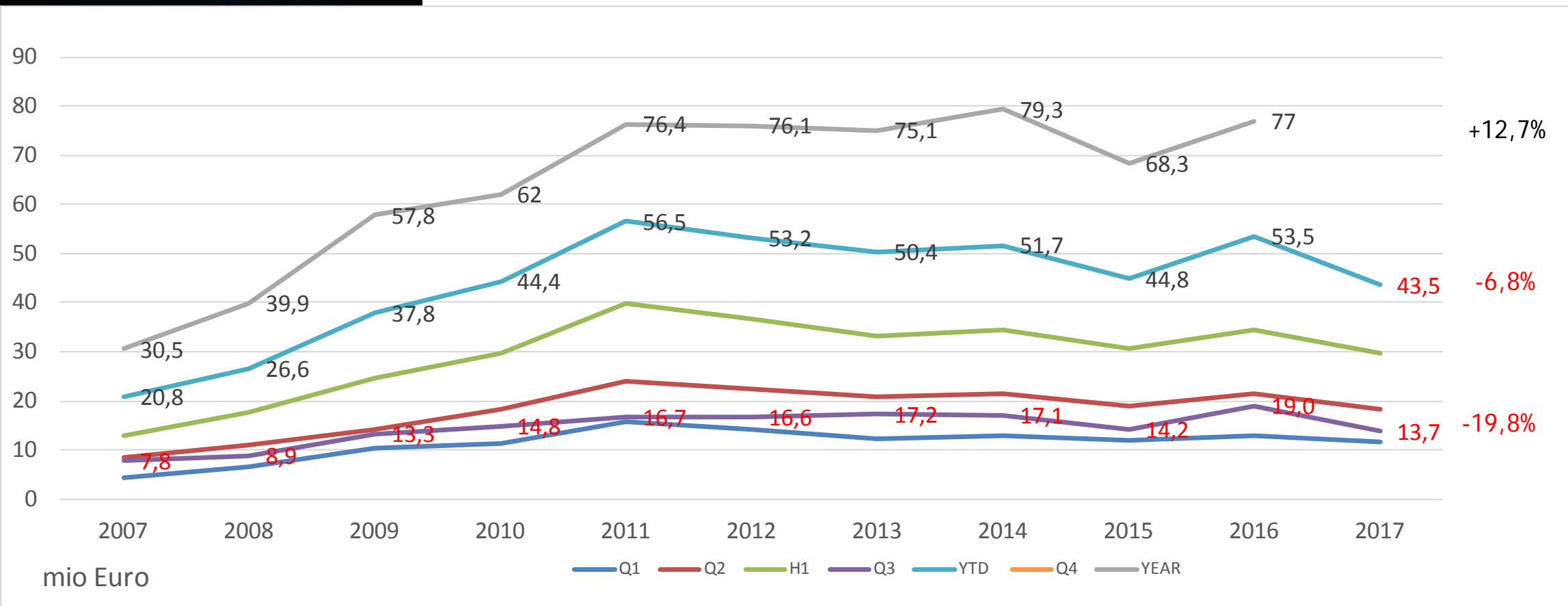
# ADEX Hellas Q3 2017 Timeline

The change in adex for all (19) publishers & networks for Q1-Q3 2017 vs 2016 is

**-18,1%**

The change of publishers and networks excluding 3 companies\* for Q1-Q3 2017 vs 2016 is **-6,8%**

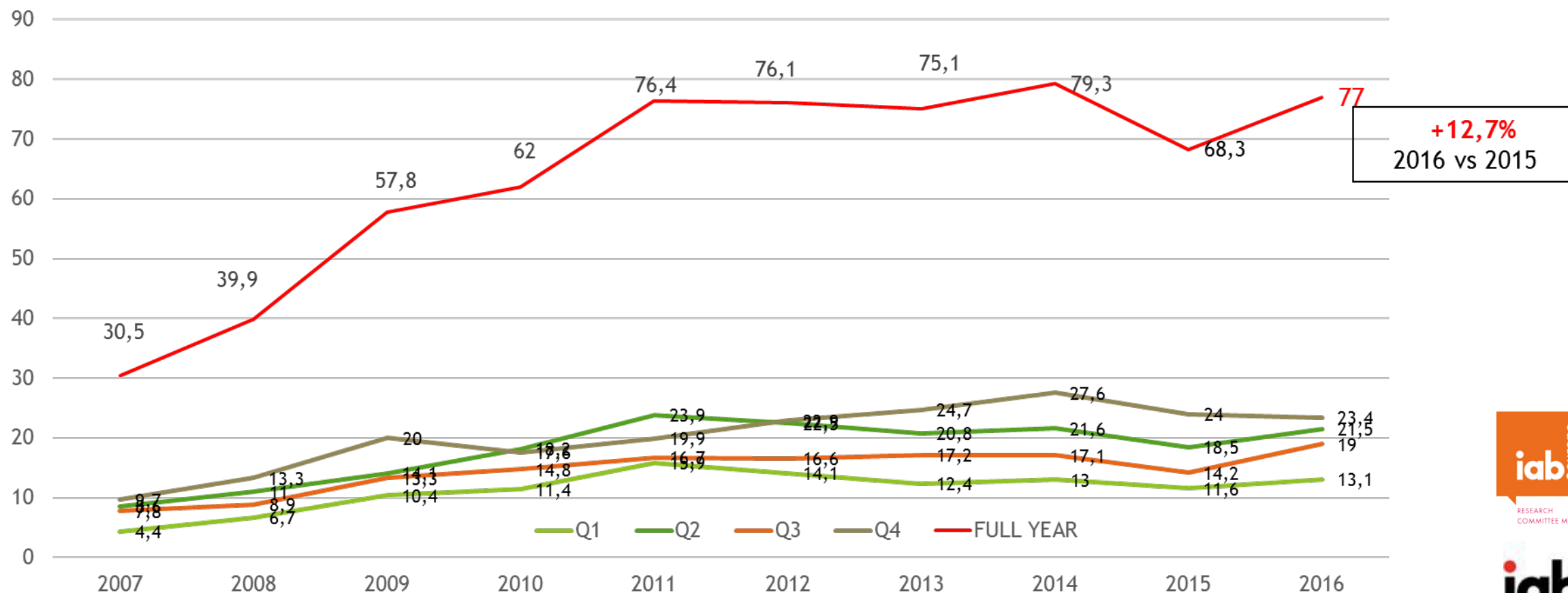
\*Note: The 3 companies are in a "shareholder transition" phase





# Full Year timeline (ADEX Hellas 2016)

22 publishers & networks, 133 sites , advertising spending (2016 vs 2015 +12,7%)

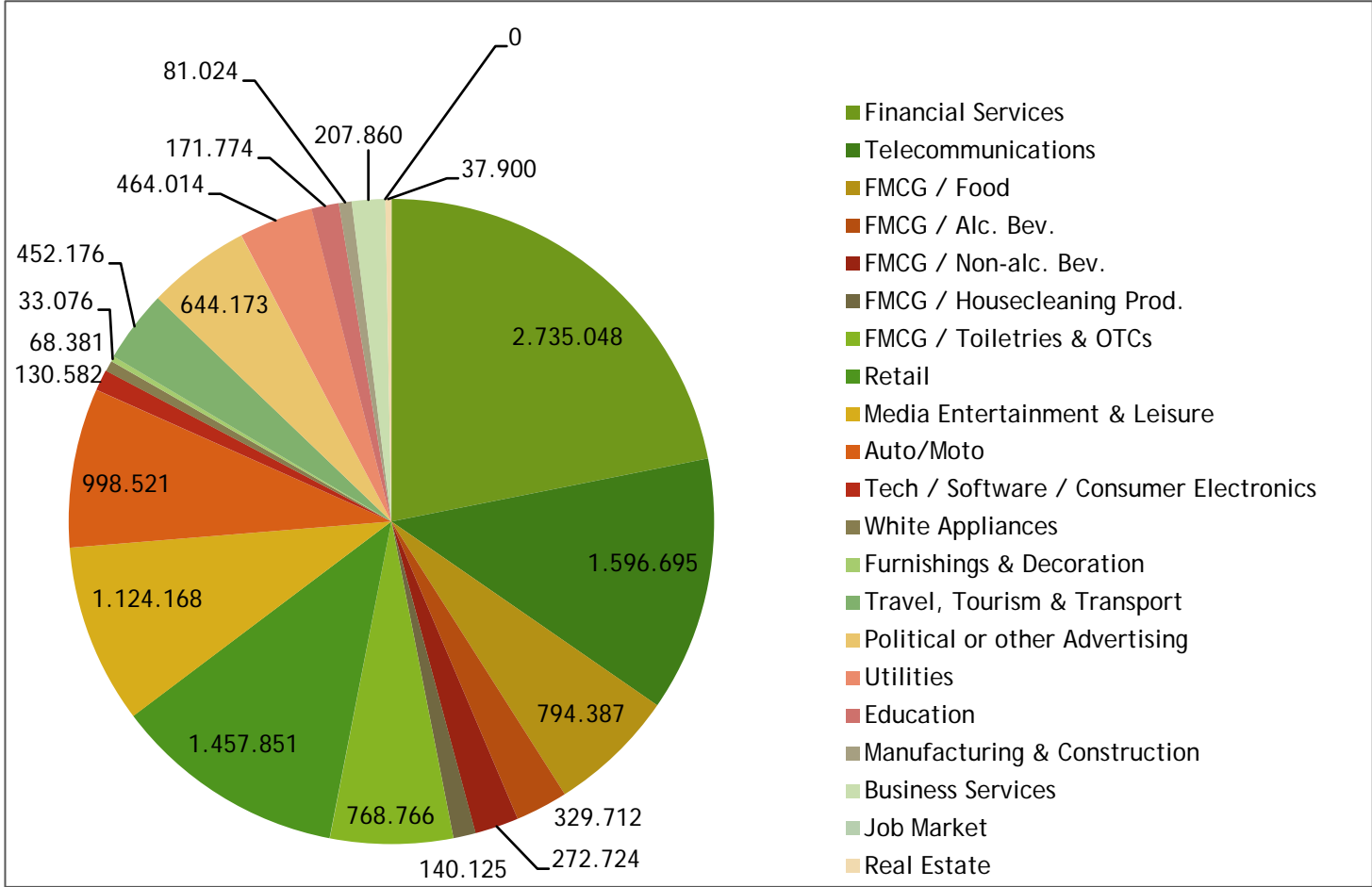


\*in mio Euros



# ADEX Hellas Sector analysis Q1 2017

Sector	Q1/2017	%
Financial Services	2.735.048	21,9%
Telecommunications	1.596.695	12,8%
FMCG / Food	794.387	6,4%
FMCG / Alc. Bev.	329.712	2,6%
FMCG / Non-alc. Bev.	272.724	2,2%
FMCG / Housecleaning Prod.	140.125	1,1%
FMCG / Toiletries & OTCs	768.766	6,1%
Retail	1.457.851	11,7%
Leisure	1.124.168	9,0%
Auto/Moto	998.521	8,0%
Electronics	130.582	1,0%
White Appliances	68.381	0,5%
Furnishings & Decoration	33.076	0,3%
Travel, Tourism & Transport	452.176	3,6%
Political or other Advertising	644.173	5,1%
Utilities	464.014	3,7%
Education	171.774	1,4%
Manufacturing & Construction	81.024	0,6%
Business Services	207.860	1,7%
Job Market	0	0,0%
Real Estate	37.900	0,3%
<b>TOTAL</b>	<b>12.508.957</b>	<b>100,0%</b>

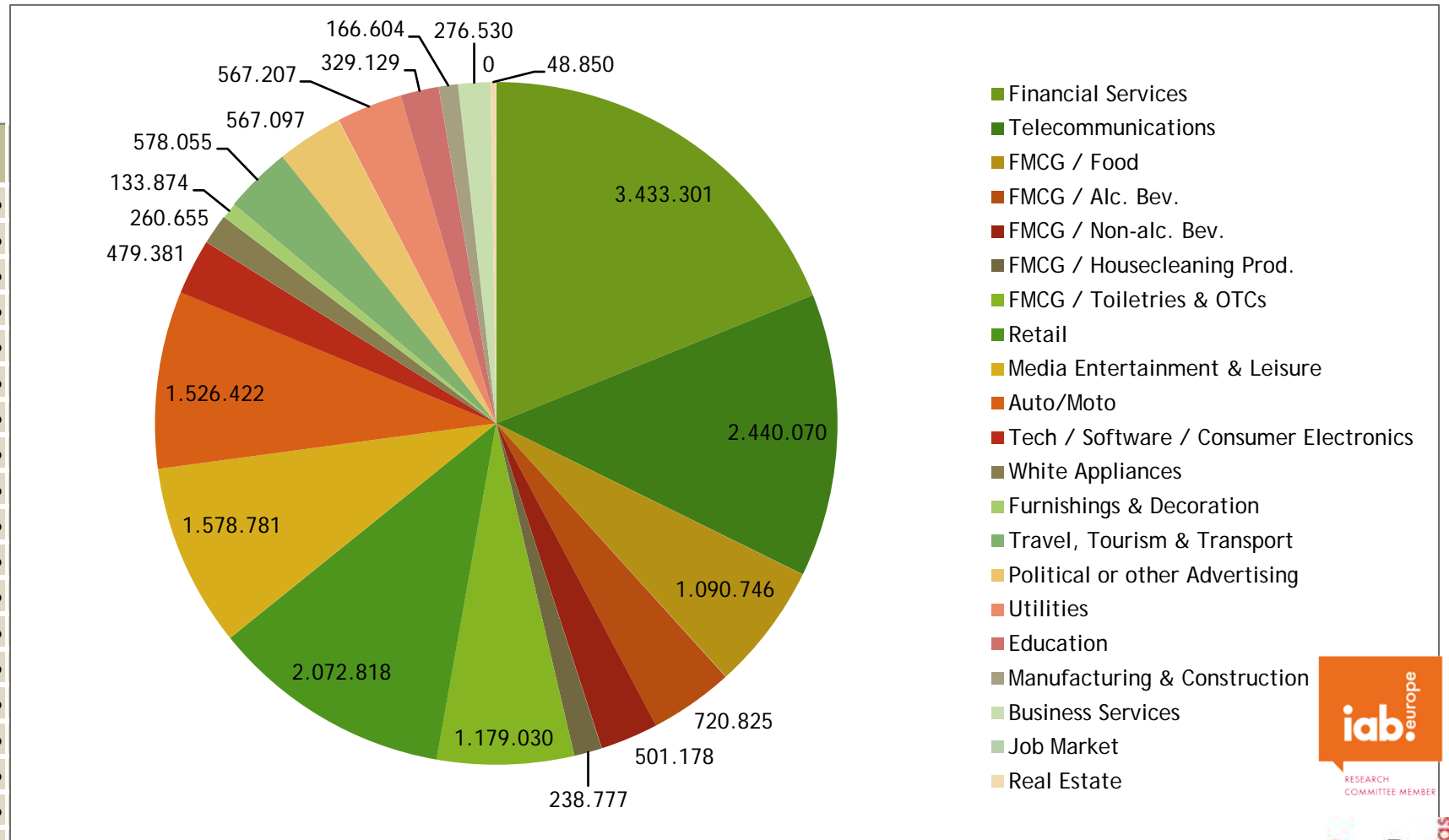


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# ADEX Hellas Sector analysis Q2 2017

SECTOR	Q2 2017	%
Financial Services	3.433.301	18,9%
Telecommunications	2.440.070	13,4%
FMCG / Food	1.090.746	6,0%
FMCG / Alc. Bev.	720.825	4,0%
FMCG / Non-alc. Bev.	501.178	2,8%
FMCG / Housecleaning Prod.	238.777	1,3%
FMCG / Toiletries & OTCs	1.179.030	6,5%
Retail	2.072.818	11,4%
Leisure	1.578.781	8,7%
Auto/Moto	1.526.422	8,4%
Electronics	479.381	2,6%
White Appliances	260.655	1,4%
Furnishings & Decoration	133.874	0,7%
Travel, Tourism & Transport	578.055	3,2%
Political or other Advertising	567.097	3,1%
Utilities	567.207	3,1%
Education	329.129	1,8%
Manufacturing & Construction	166.604	0,9%
Business Services	276.530	1,5%
Job Market	0	0,0%
Real Estate	48.850	0,3%
<b>TOTAL</b>	<b>18.189.329</b>	<b>100,0%</b>



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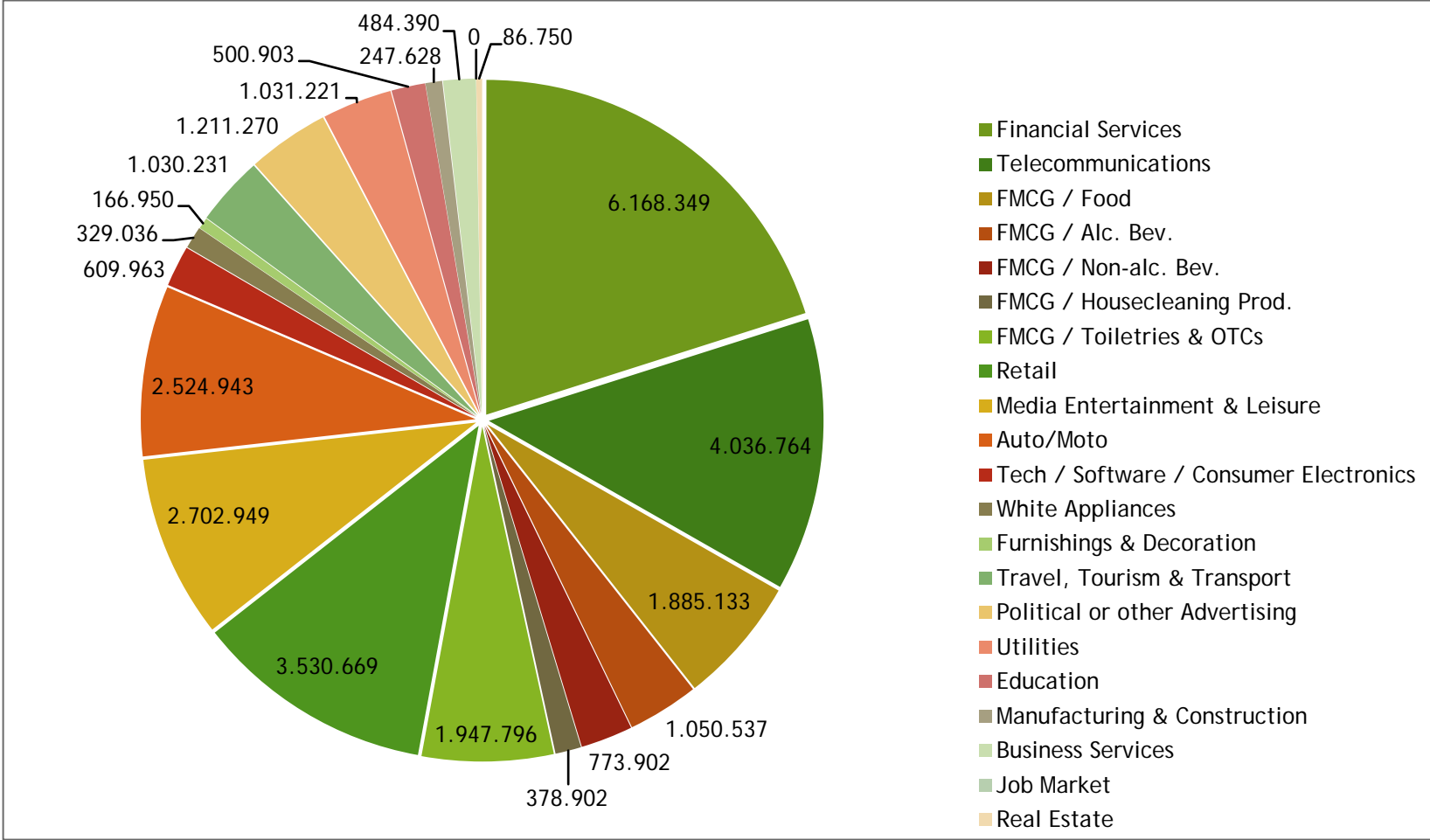






# ADEX Hellas Sector analysis Q1+Q2 2017

SECTOR	Q1+Q2 017	%
Financial Services	6.168.349	20,1%
Telecommunications	4.036.764	13,1%
FMCG / Food	1.885.133	6,1%
FMCG / Alc. Bev.	1.050.537	3,4%
FMCG / Non-alc. Bev.	773.902	2,5%
Prod.	378.902	1,2%
OTCs	1.947.796	6,3%
Retail	3.530.669	11,5%
Leisure	2.702.949	8,8%
Auto/Moto	2.524.943	8,2%
Consumer Electronics	609.963	2,0%
White Appliances	329.036	1,1%
Decoration	166.950	0,5%
Transport	1.030.231	3,4%
Advertising	1.211.270	3,9%
Utilities	1.031.221	3,4%
Education	500.903	1,6%
Construction	247.628	0,8%
Business Services	484.390	1,6%
Job Market	0	0,0%
Real Estate	86.750	0,3%
<b>TOTAL</b>	<b>30.698.286</b>	<b>100,0%</b>



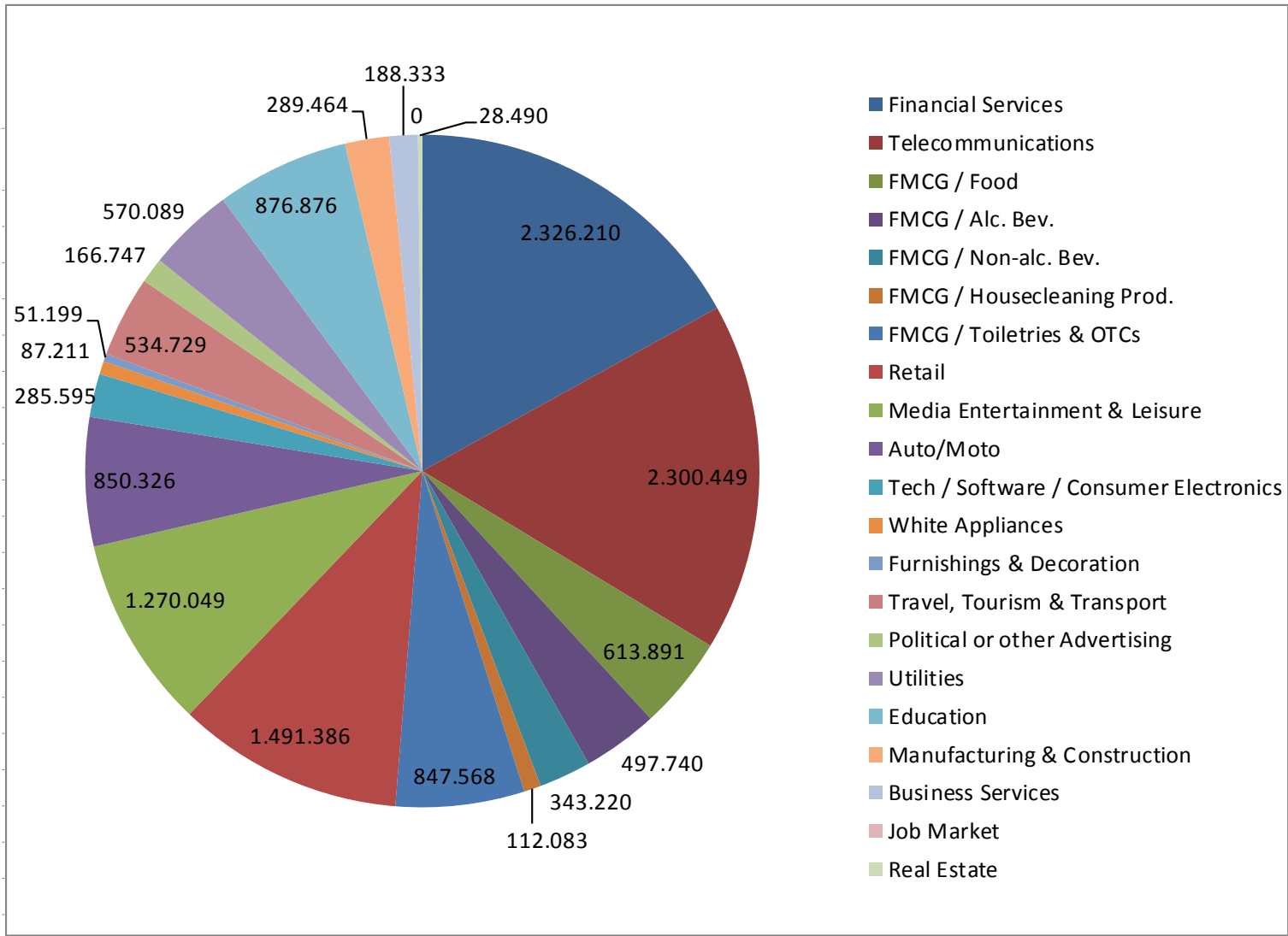
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# ADEX Hellas Sector analysis Q3 2017

SECTOR	Q3 2017	%
Financial Services	2.326.210	16,9%
Telecommunications	2.300.449	16,8%
FMCG / Food	613.891	4,5%
FMCG / Alc. Bev.	497.740	3,6%
FMCG / Non-alc. Bev.	343.220	2,5%
FMCG / Housecleaning Prod.	112.083	0,8%
FMCG / Toiletries & OTCs	847.568	6,2%
Retail	1.491.386	10,9%
Media Entertainment & Leisure	1.270.049	9,2%
Auto/Moto	850.326	6,2%
Electronics	285.595	2,1%
White Appliances	87.211	0,6%
Furnishings & Decoration	51.199	0,4%
Travel, Tourism & Transport	534.729	3,9%
Political or other Advertising	166.747	1,2%
Utilities	570.089	4,2%
Education	876.876	6,4%
Manufacturing & Construction	289.464	2,1%
Business Services	188.333	1,4%
Job Market	0	0,0%
Real Estate	28.490	0,2%
<b>TOTAL</b>	<b>13.731.655</b>	<b>100,0%</b>



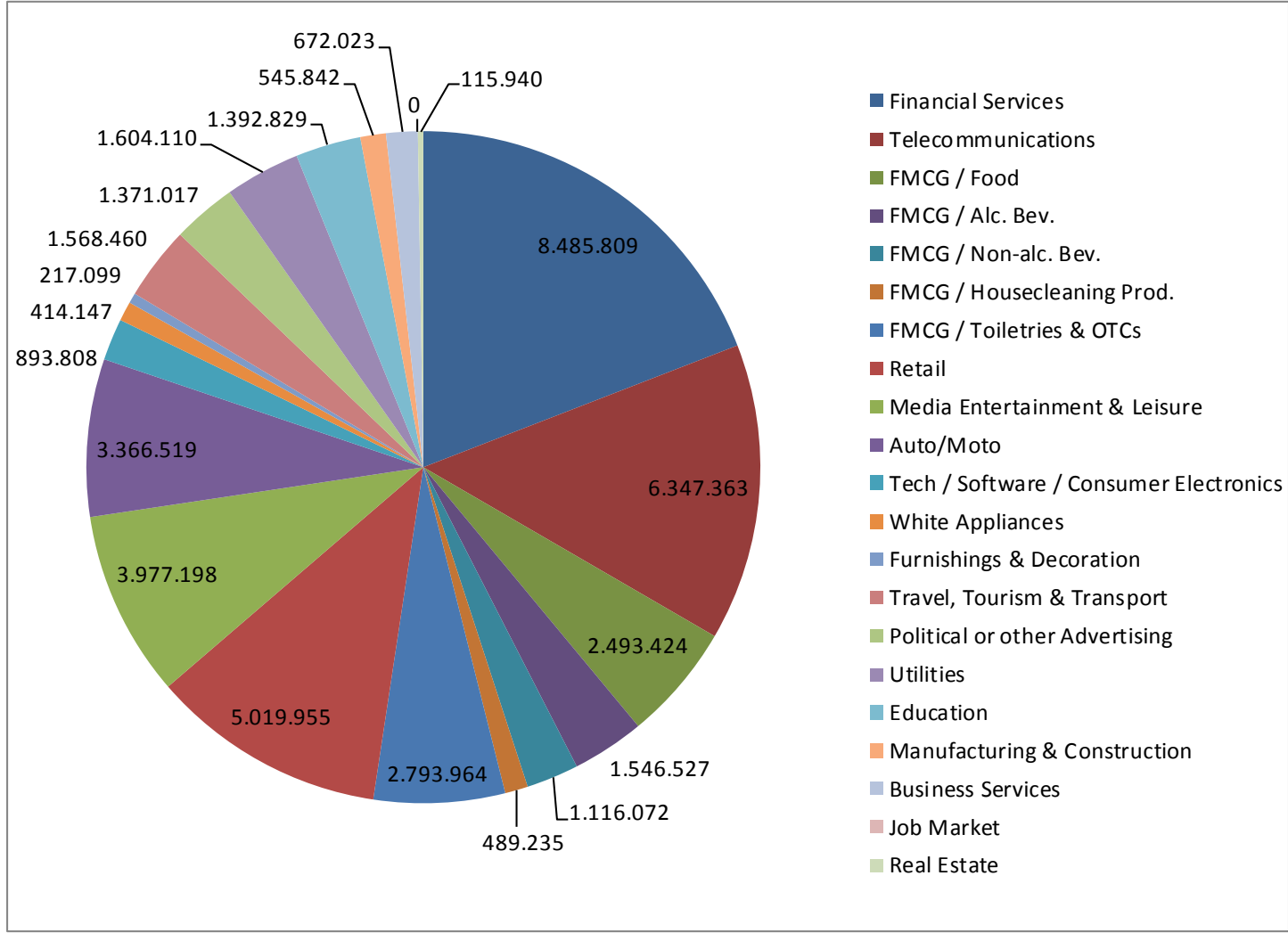
- Financial Services
- Telecommunications
- FMCG / Food
- FMCG / Alc. Bev.
- FMCG / Non-alc. Bev.
- FMCG / Housecleaning Prod.
- FMCG / Toiletries & OTCs
- Retail
- Media Entertainment & Leisure
- Auto/Moto
- Tech / Software / Consumer Electronics
- White Appliances
- Furnishings & Decoration
- Travel, Tourism & Transport
- Political or other Advertising
- Utilities
- Education
- Manufacturing & Construction
- Business Services
- Job Market
- Real Estate





# ADEX Hellas Sector analysis Q1-Q3 2017

SECTOR	Q1-Q3 2017	%
Financial Services	8.485.809	19,1%
Telecommunications	6.347.363	14,3%
FMCG / Food	2.493.424	5,6%
FMCG / Alc. Bev.	1.546.527	3,5%
FMCG / Non-alc. Bev.	1.116.072	2,5%
Prod.	489.235	1,1%
OTCs	2.793.964	6,3%
Retail	5.019.955	11,3%
Leisure	3.977.198	9,0%
Auto/Moto	3.366.519	7,6%
Consumer Electronics	893.808	2,0%
White Appliances	414.147	0,9%
Decoration	217.099	0,5%
Transport	1.568.460	3,5%
Advertising	1.371.017	3,1%
Utilities	1.604.110	3,6%
Education	1.392.829	3,1%
Construction	545.842	1,2%
Business Services	672.023	1,5%
Job Market	0	0,0%
Real Estate	115.940	0,3%
<b>TOTAL</b>	<b>44.431.341</b>	<b>100,0%</b>





# ADEX Hellas Q3 2017 Participants Publishers & Networks

2015 (PARTICIPANTS 19)	2016 (PARTICIPANTS 22)	2017 Q3 (PARTICIPANTS 19)
24MEDIA	24MEDIA	24MEDIA
ADWEB NETWORK	ADWEB NETWORK	ADWEB NETWORK
ALPHA TV	ALPHA TV	ALPHA TV
ANTENNA	ANTENNA	ANTENNA
ATTICA MEDIA	ATTICA MEDIA	ATTICA MEDIA
CAPITAL.GR	CAPITAL.GR	CAPITAL.GR
DESMI EKDOTIKI	DESMI EKDOTIKI	DESMI EKDOTIKI
DOL DIGITAL	DOL DIGITAL	DOL DIGITAL   transition phase
DPG	DPG	DPG
	FORTHNET L2L	FORTHNET
FREENET (SOFOKLEOUSIN.GR)	FREENET (SOFOKLEOUSIN.GR)	FREENET (SOFOKLEOUSIN.GR)
KATHIMERINI	KATHIMERINI	KATHIMERINI
LIQUID MEDIA (NEW)	LIQUID MEDIA	LIQUID MEDIA
MEDIA2DAY	MEDIA2DAY	MEDIA2DAY
MEGA TV	MEGA TV	MEGA TV (transition phase)
PRIME MEDIA (NEWBEAST)	PRIME MEDIA (NEWBEAST)	PRIME MEDIA (NEWBEAST)
PEGASUS INTERACTIVE	PEGASUS INTERACTIVE	PEGASUS INTERACTIVE   transition phase
PHAISTOS NETWORKS	PHAISTOS NETWORKS	PHAISTOS NETWORKS
THINK DIGITAL NETWORK	THINK DIGITAL NETWORK	THINK DIGITAL NETWORK
	TVXS	TVXS
	TNC DIGITAL MEDIA GROUP (L2L)	TNC DIGITAL MEDIA GROUP
YAHOO!	YAHOO! (TOTAL ONLY)	YAHOO!   total only





# ADEX Hellas Q2 2017 Participants Publishers & Networks

	PUBLISHER /NETWORK	Q1-Q2 2107
1	24MEDIA	Sport24.gr
2	24MEDIA	Contra.gr
3	24MEDIA	News247.gr
4	24MEDIA	Huffpost
5	24MEDIA	oneman.gr
6	24MEDIA	ladylike.gr
7	24MEDIA	redplanet.gr
8	24MEDIA	prasinanea.gr
9	24MEDIA	olapaok.gr
10	24MEDIA	nba.gr
11	24MEDIA	euroleague.gr
12	24MEDIA	deltiokairou.gr
13	24MEDIA	sport24.gr
14	24MEDIA	techgear.gr
15	ADWEB	andro.gr
16	ADWEB	arionradio.gr
17	ADWEB	athensparty.gr
18	ADWEB	athenstimeout.gr
19	ADWEB	boro.gr
20	ADWEB	caruzo.gr
21	ADWEB	cookbox.gr
22	ADWEB	cosmopoliti.gr
23	ADWEB	dietup.gr
24	ADWEB	e-daily.gr
25	ADWEB	e-radio.gr
26	ADWEB	games.gr
27	ADWEB	manslife.gr
28	ADWEB	<a href="http://marymary.gr">marymary.gr</a>
29	ADWEB	neolaia.gr

	PUBLISHER /NETWORK
30	ADWEB
31	ADWEB
32	ADWEB
33	ADWEB
34	ADWEB
35	ADWEB
36	ADWEB
37	ADWEB
38	ALPHA TV
39	ANTENNA
40	ANTENNA
41	DESMI EKDOTIKI
42	ATTICA
43	ATTICA
44	ATTICA
45	ATTICA
46	ATTICA
47	CAPITAL
48	DPG DIGITAL



# ADEX Hellas Q2 2017 Participants Publishers & Networks

	PUBLISHER /NETWORK		PUBLISHER /NETWORK		PUBLISHER /NETWORK
49	DPG DIGITAL	74	LIQUID	94	THE THINK DIGITAL
50	DPG DIGITAL	75	LIQUID	95	THE THINK DIGITAL
51	DPG DIGITAL	76	MEDIA2DAY	96	THE THINK DIGITAL
52	DPG DIGITAL	77	MEDIA2DAY	97	THE THINK DIGITAL
53	DPG DIGITAL	78	MEDIA2DAY	98	THE THINK DIGITAL
54	DPG DIGITAL	79	MEDIA2DAY	99	THE THINK DIGITAL
55	DPG DIGITAL	80	PHAISTOS	100	THE THINK DIGITAL
56	DPG DIGITAL	81	PHAISTOS	101	THE THINK DIGITAL
57	DPG DIGITAL	82	PRIME	102	THE THINK DIGITAL
58	DPG DIGITAL	83	PRIME	103	THE THINK DIGITAL
59	FORTHNET MEDIA	84	PRIME	104	THE THINK DIGITAL
60	KATHIMERINI	85	NICKELODEON	105	THE THINK DIGITAL
61	KATHIMERINI	86	RISE	106	THE THINK DIGITAL
62	KATHIMERINI	87	THE THINK DIGITAL	107	THE THINK DIGITAL
63	KATHIMERINI	88	THE THINK DIGITAL	108	TNC DGITAL MEDIA
64	KATHIMERINI	89	THE THINK DIGITAL	109	TNC DGITAL MEDIA
65	LIQUID	90	THE THINK DIGITAL	110	TNC DGITAL MEDIA
66	LIQUID	91	THE THINK DIGITAL	111	TNC DGITAL MEDIA
67	LIQUID	92	THE THINK DIGITAL	112	TVXS
68	LIQUID	93	THE THINK DIGITAL	113	FREENET
69	LIQUID			114	FREENET
70	LIQUID			115	FREENET
71	LIQUID			116	YAHOO
72	LIQUID				
73	LIQUID				



## Interactive Marketing Conference IMC 2017

Πέμπτη 14/12/2017

- 16<sup>η</sup> συνεχή χρονιά
- Παπαστράτος
- 400 άτομα διαφημιζόμενοι, agencies, publishers



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DIMAQ for Greece  
Digital Marketing Qualification

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NOVEMBER 2017

The DIMAAQ logo is positioned on the right side of the slide, set against a black background. The letters 'D', 'M', 'A', and 'Q' are white, while the letters 'I' and 'A' are red. A registered trademark symbol (®) is located at the top right of the 'Q'.





**Η πρώτη Επαγγελματική  
Πιστοποίηση για το Digital  
Marketing στην Ελλάδα  
με ελληνικό και διεθνές  
περιεχόμενο  
στην Αγγλική Γλώσσα**

DIMAQ by IAB HELLAS



# Με την Αιγίδα του iab europe



Και διεθνή ισχύ από το 2018



# DIMAQ by IAB HELLAS



- |                                     |
|-------------------------------------|
| 1. DIGITAL BASICS                   |
| 2. STRATEGY & PLANNING              |
| 3. DISPLAY ADVERTISING              |
| 4. SEARCH ENGINE MARKETING          |
| 5. VIDEO ADVERTISING                |
| 6. SOCIAL MEDIA & CONTENT MARKETING |
| 7. MOBILE MARKETING                 |
| 8. PROGRAMMATIC RTB                 |
| 9. EMAIL MARKETING                  |
| 10. e-COMMERCE                      |
| 11. ANALYTICS & UX                  |
| 12. DIGITAL LAW                     |

Με θεματικές που καλύπτουν όλο το φάσμα του  
Digital Marketing

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## Πρόγραμμα Εξετάσεων & Preparatory Training Sessions διάρκειας 16 ωρών

	Training Day 1	Training Day 2	Training Day 3	Training Day 4	DIMAQ Exam
December	6-Δεκ	7-Δεκ	12-Δεκ	13-Δεκ	16-Δεκ
January	17-Ιαν	18-Ιαν	24-Ιαν	25-Ιαν	27-Ιαν
February	14-Φεβ	15-Φεβ	21-Φεβ	22-Φεβ	24-Φεβ



## Χώρος Διεξαγωγής Εξετάσεων & Preparatory Training Sessions



Egg Corridor



Egg Main Conference Room...



Egg Main Conference Room...



Egg Main Conference Room...



Egg Recreation Room view...



Egg Recreation Room view...



Egg Recreation Room view...



Egg Recreation Room view...



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## **INTERACTIVE MARKETING CONFERENCE 2017**

**ΠΕΜΠΤΗ 14 ΔΕΚΕΜΒΡΙΟΥ 2017, ΑΘΗΝΑ**  
**Μία εκδήλωση του IAB HELLAS**



Για 16<sup>η</sup> χρονιά, το ετήσιο **INTERACTIVE MARKETING CONFERENCE (IMC)** θα πραγματοποιηθεί στην Αθήνα από τον IAB Hellas.

Το απόλυτο συνέδριο για digital και interactive marketing, θα λάβει χώρα την **ΠΕΜΠΤΗ 14 ΔΕΚΕΜΒΡΙΟΥ, ΣΤΗΝ ΑΘΗΝΑ**







## INDUSTRY 4.0: RIDING THE WAVE OF TOTAL TRANSFORMATION

### Το περιεχόμενο του συνεδρίου

Το φετινό IMC θα εμπνεύσει, θα εκπαιδεύσει και θα ενθαρρύνει διαφημιστές, marketers, εκδότες και media agencies που θέλουν να μάθουν τα πάντα για τις βασικότερες τάσεις του **INDUSTRY 4.0** και την ανάγκη για το απόλυτο digital transformation.

Μέσα από παρουσιάσεις καταξιωμένων ομιλητών, case studies από διεθνείς αγορές και εταιρίες που κατέχουν ηγετική θέση στην Ελλάδα και στον κόσμο, το Interactive Marketing Conference έχει αναλάβει μία αποστολή: να δώσει σε κάθε εταιρία τη γνώση και τα εργαλεία που χρειάζεται για να πετύχει στην εποχή του **INDUSTRY 4.0** ακόμα και με Growth Hacking.





## Πρόγραμμα Ομιλητών



### Prashant Mehta

Group VP & Global Service Line Lead, Systems Integration & Data/AI, SapientRazorfish

Για πρώτη φορά στην Ελλάδα, ο άνθρωπος που οδηγεί παγκοσμίως τις εξελίξεις στο Industry 4.0 και ευθύνεται για το digital transformation εκατοντάδων enterprises, έρχεται να μας εμπνεύσει για το πώς το AI και τα Big Data βοηθούν τις επιχειρήσεις να επανεφεύρουν τον τρόπο λειτουργίας τους.



### Matthias Matthiesen

Senior Manager, Privacy & Public Policy, IAB Europe

Με βαθιά γνώση στον τομέα της διαχείρισης προσωπικών δεδομένων, ο Matthias Matthiesen μας προσφέρει μία μοναδική ευκαιρία να ακούσουμε στην πράξη πολύτιμες συμβουλές σχετικές με τον νέο κανονισμό GDPR που θα εφαρμοστεί από την 25η Μαΐου 2018.



### Christian Flodén

Head of Partner Sales, EMEA, Spotify

Με όλη την πολυετή εμπειρία του στην πιο επιτυχημένη μουσική πλατφόρμα του κόσμου, ο Christian Flodén μοιράζεται μαζί μας το πώς να εκμεταλλευτούμε τα Big Data και να τα μετατρέψουμε σε υπερπολύτιμα human insights.

Μαζί τους πολλοί ακόμα διεθνείς και Έλληνες ομιλητές. *Save the date!*

#### Πληροφορίες-Εισιτήρια:

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Φίλιππος Κιουρτσιδάκης, τηλ.: 210 6617 777 (εσωτ. 224), e-mail: [fkourtsidakis@boussias.com](mailto:fkourtsidakis@boussias.com)

