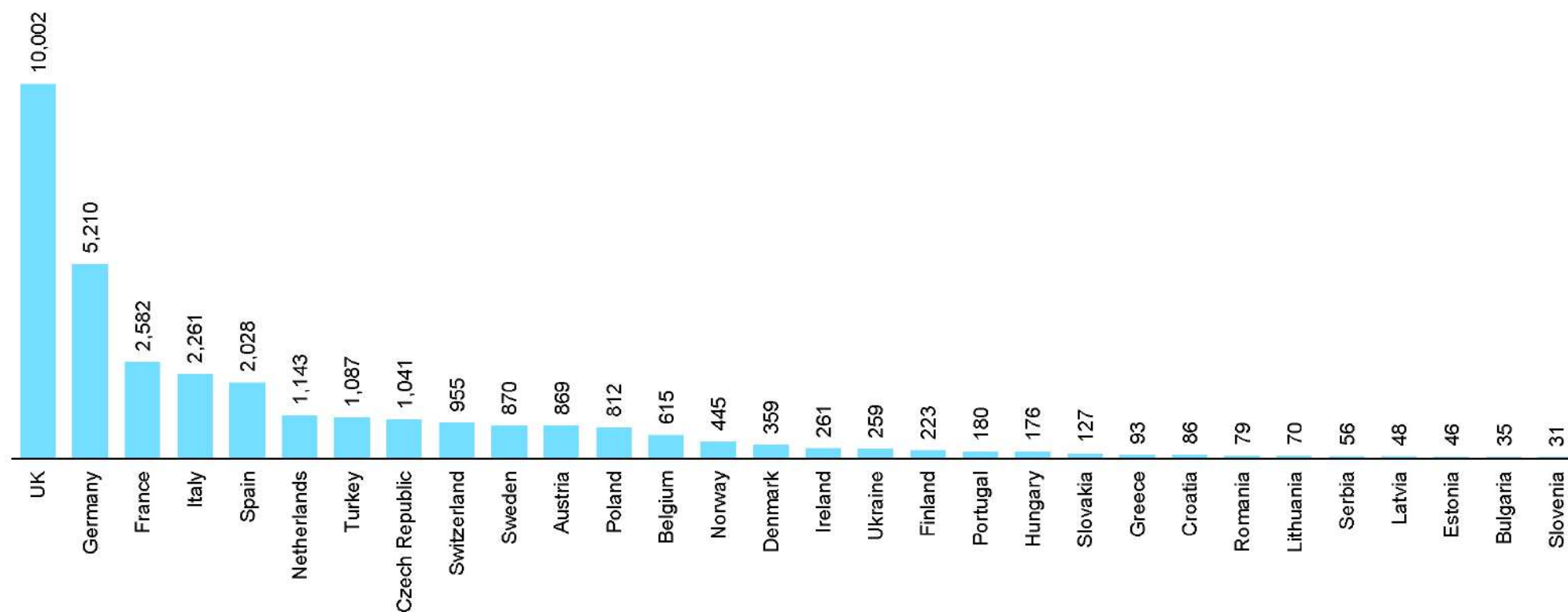




Display

8 markets exceeded €1bn in 2025

Europe: Display Ad Market Size 2025 (€m)



Note: All data in constant 2025 EUR. Excludes Social.

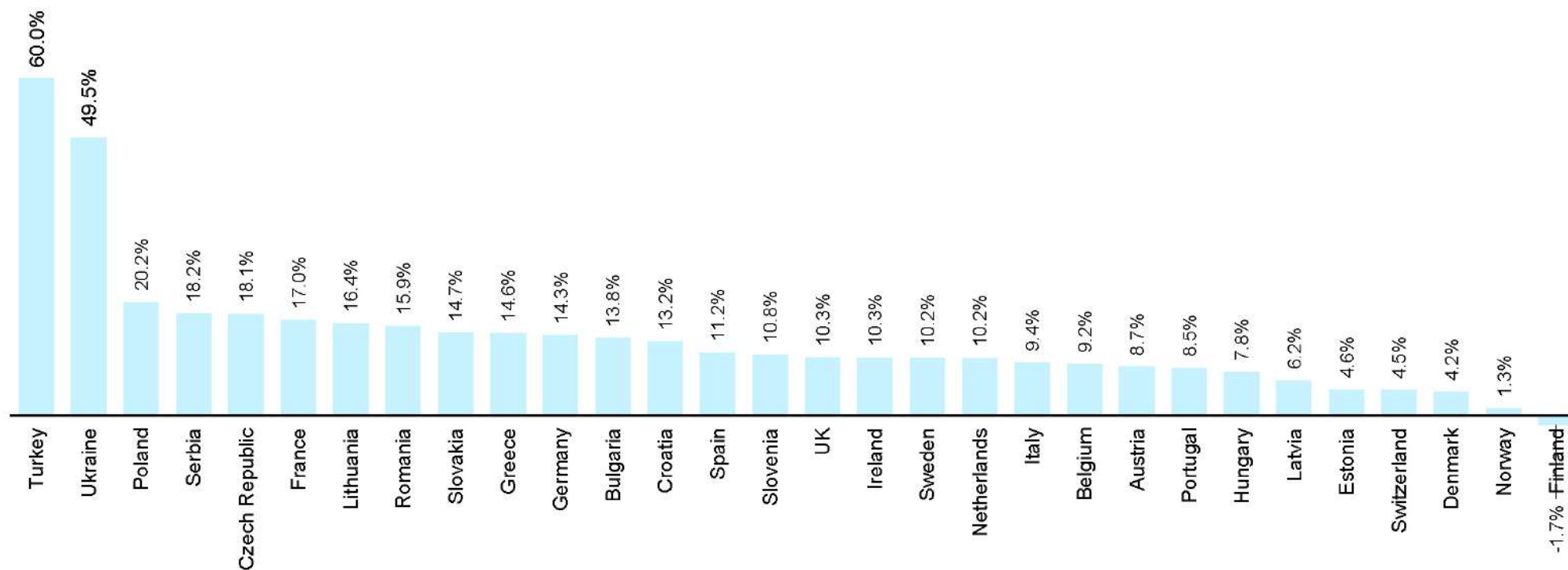
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Display

Most markets saw double-digit growth in Display

Europe: Display Ad Market Growth 2025 vs 2024

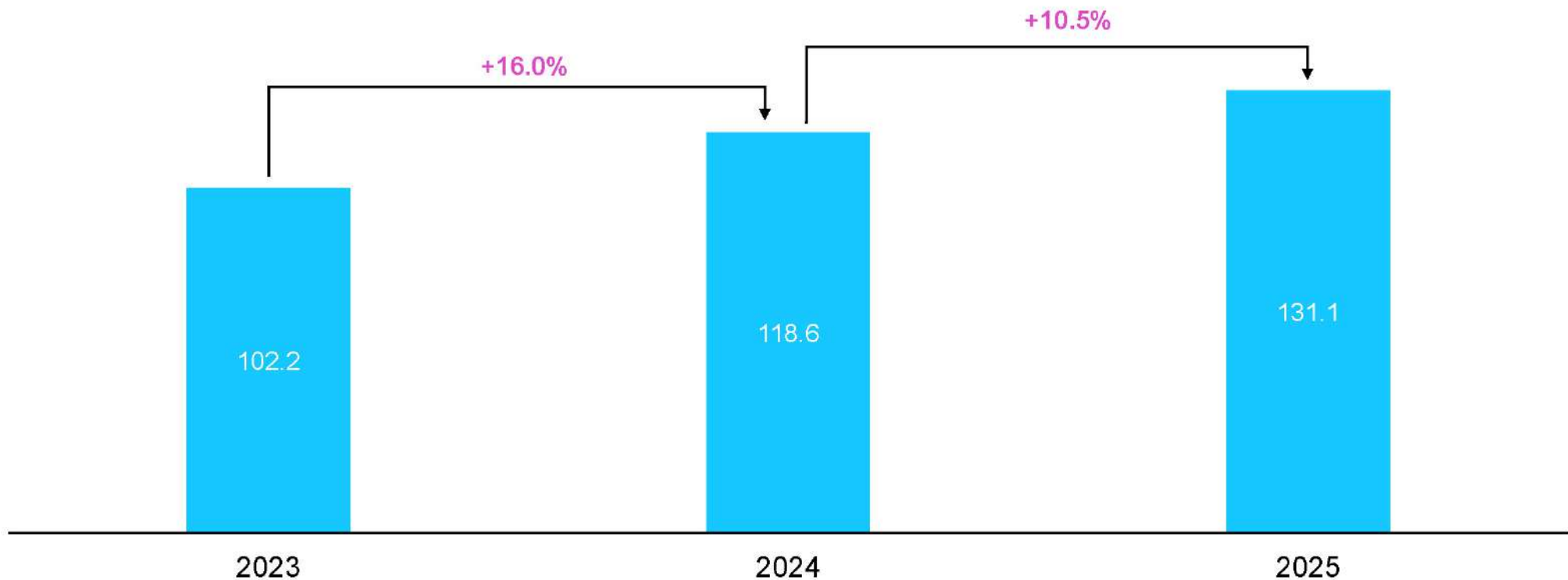


Note: All data in constant 2025 EUR. Excludes Social.

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European digital ad market growth decelerated in 2025

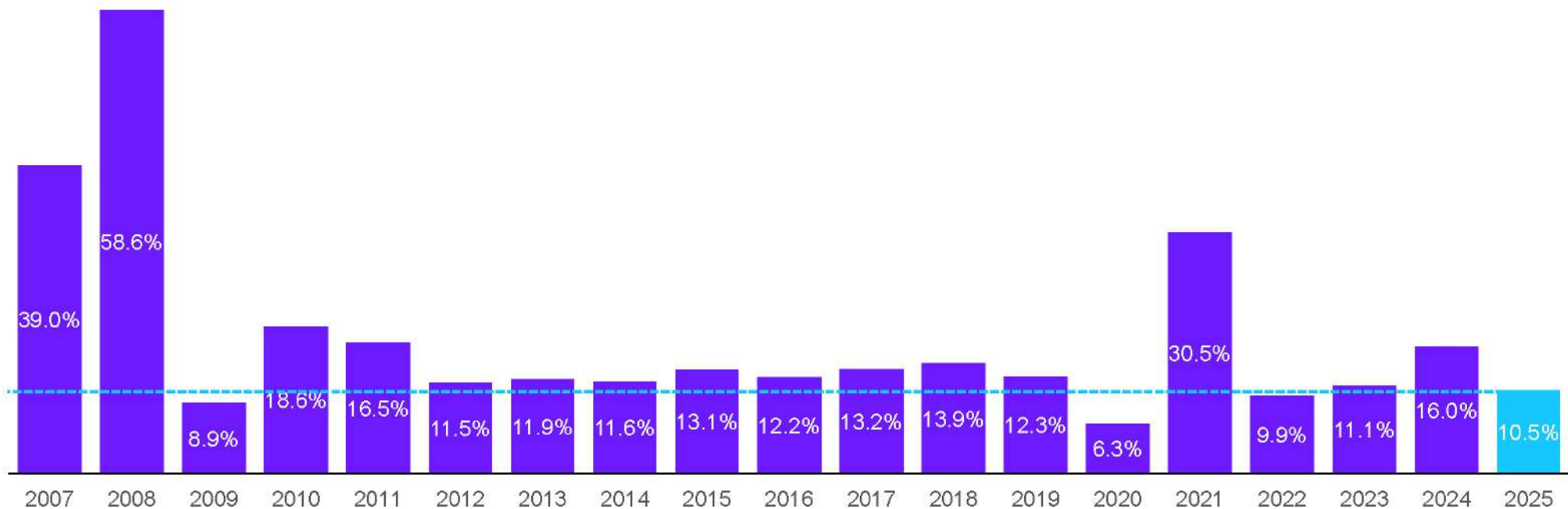
Europe: Digital Advertising Market (€bn)



Note: All data in constant 2025 EUR; 2024 restated approximately using the published growth rate. Excl. Turkey, 2025 vs 2024 growth was +9.7%. Adjusted for inflation in Turkey & Ukraine (IAS 29 tier method), growth was +9.4%.

Growth normalised in 2025, just below its pre-pandemic long-run average

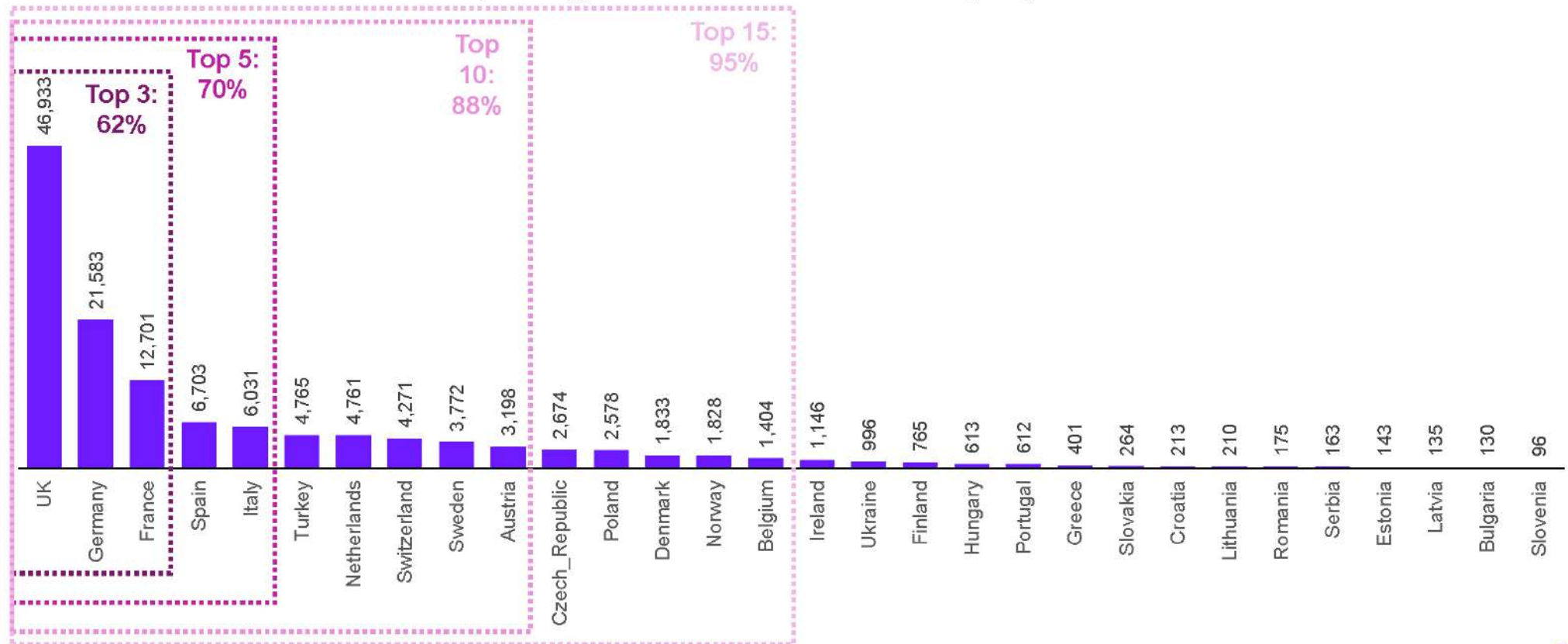
Europe: Digital Advertising Market Growth (year-over-year)



Note: In constant 2025 Euros. Growth excl. Turkey was +9.7%; adjusted for inflation in Turkey & Ukraine: +9.4%.

The European digital ad market remains top-heavy with the 3 largest countries contributing 62% to the total

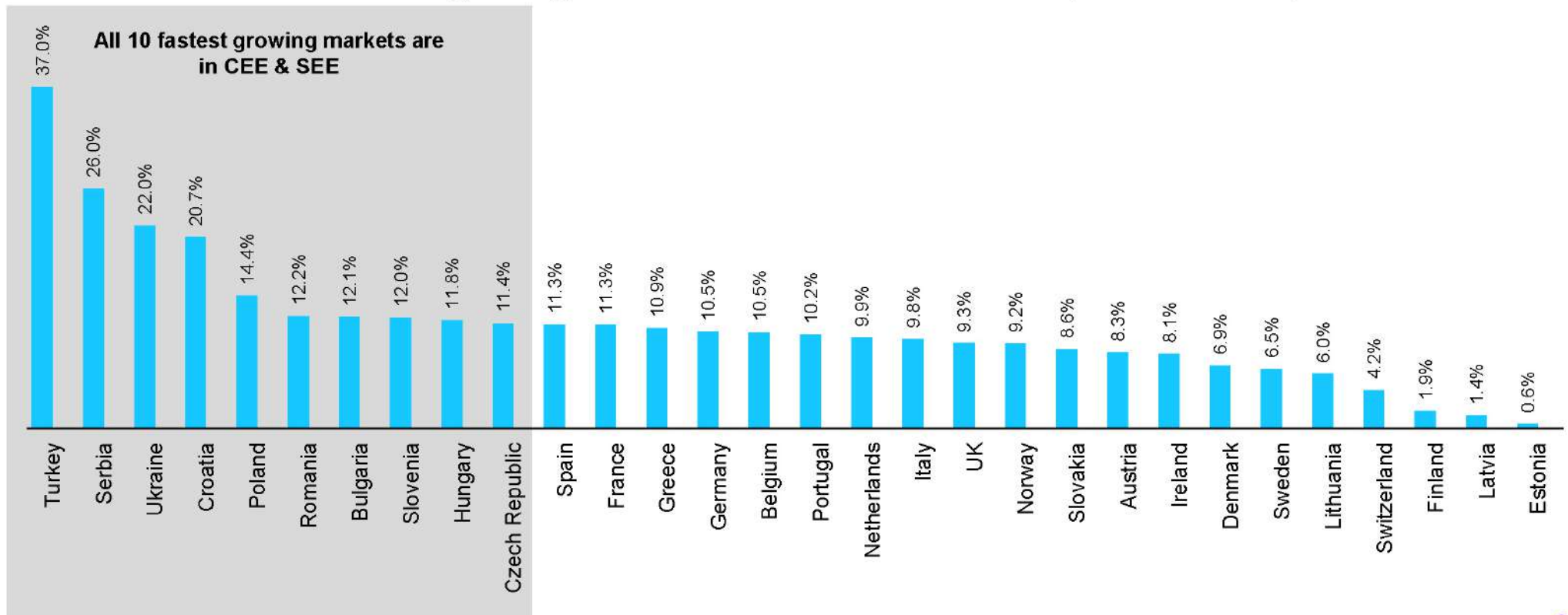
Europe: Digital Ad Market Size 2025 (€m)



Note: All data in constant 2025 EUR. As 2025 is the fx base year, constant and current EUR coincide; this view reflects actual market value in EUR between countries.

16 out of 30 markets grew double-digit, and all 30 markets recorded growth

Ranking of Digital Ad Market Growth '25 vs '24 (constant EUR)



Note: All data in constant 2025 EUR.