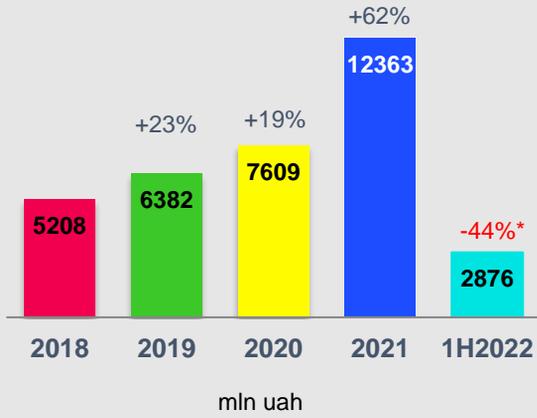
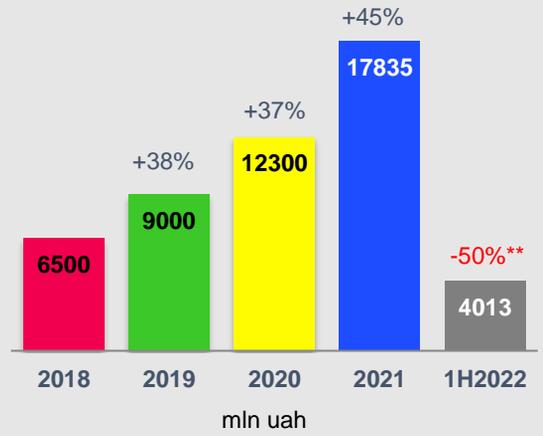


INTERNET ADVERTISING MARKET VOLUME ASSESSMENT 1H2022

Media Advertising



Paid Search



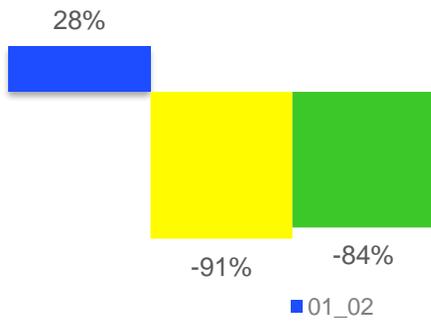
*regarding 1H2021

**regarding 1H2021, modeling based on dynamics of survey participants, data are not final

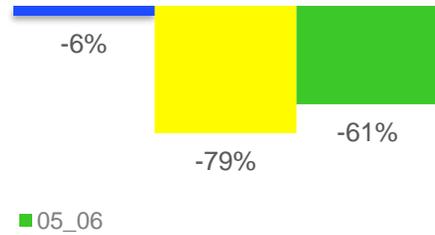
Exchange rate 2018 - 31,7141; 2019 - 25,8085; 2020 - 34,6375; 2021 - 30,776; 1H2022 - 30,7776

Dynamics of Internet advertising market volume by pool of participants regarding to 2021

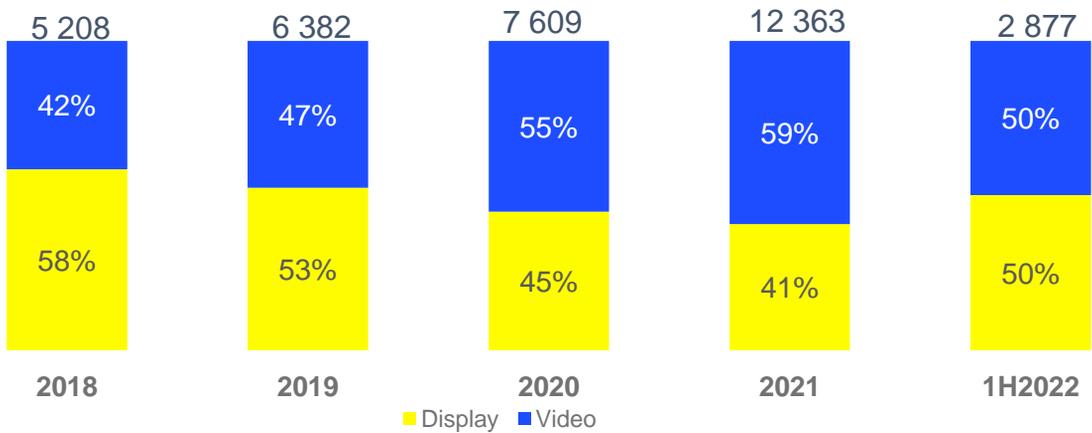
Media Advertising In general, for the half-year -56%



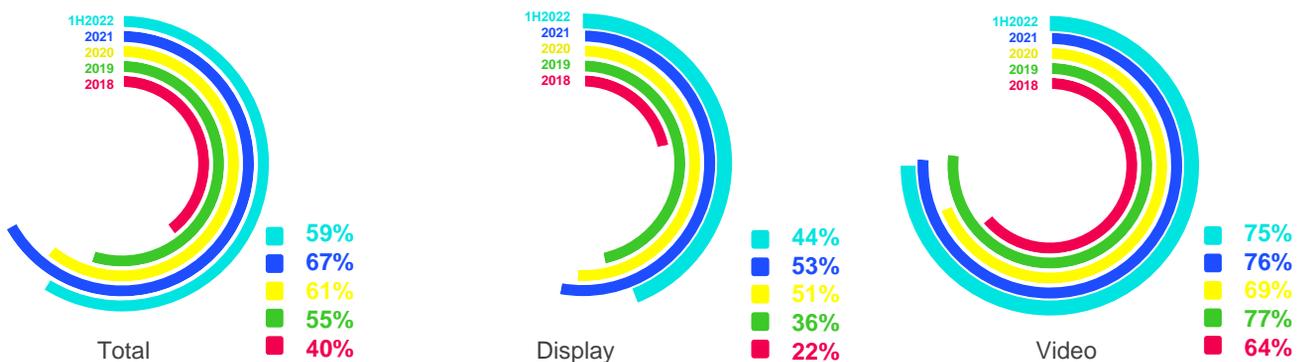
Paid Search In general, for the half-year -50%



Dynamics of Internet media advertising market volume 2018-1H2022

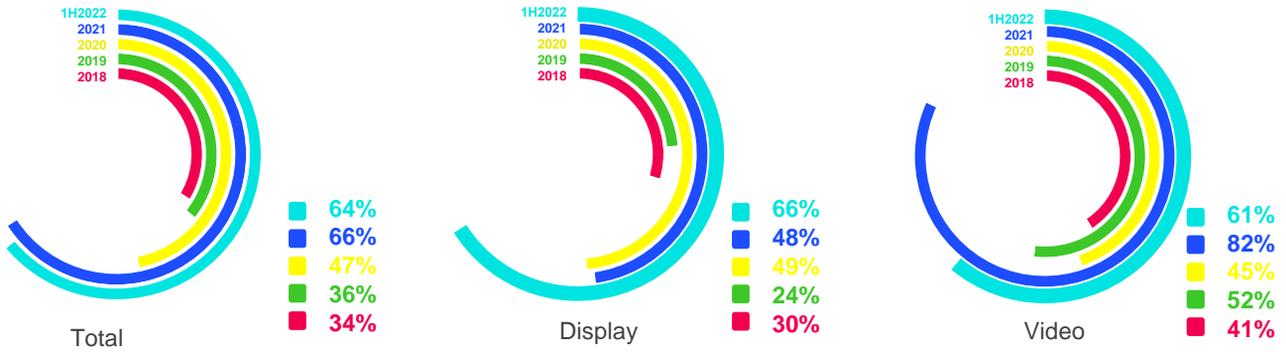


Global players impact (Facebook, Google, Instagram)

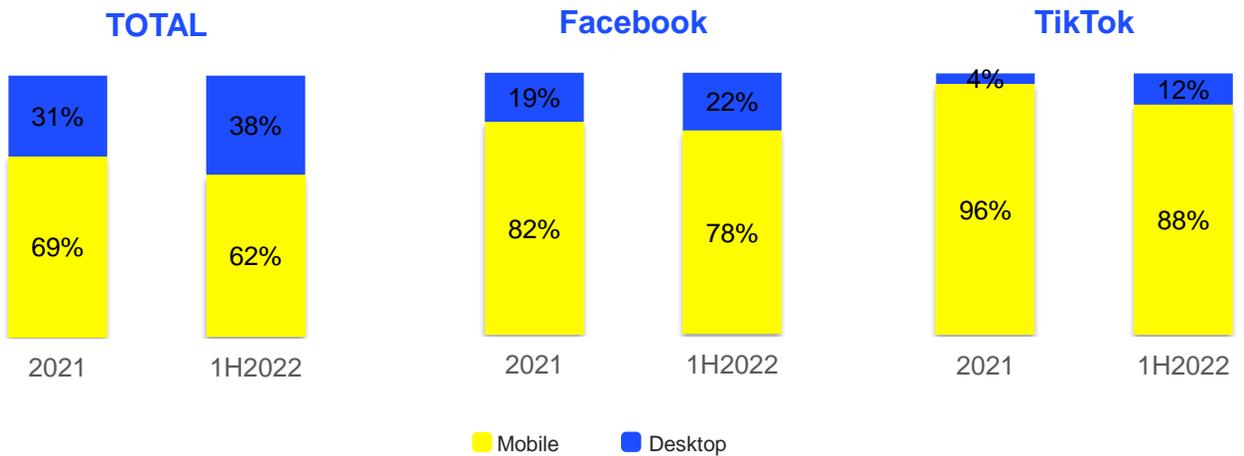


INTERNET ADVERTISING MARKET VOLUME ASSESSMENT 1H2022

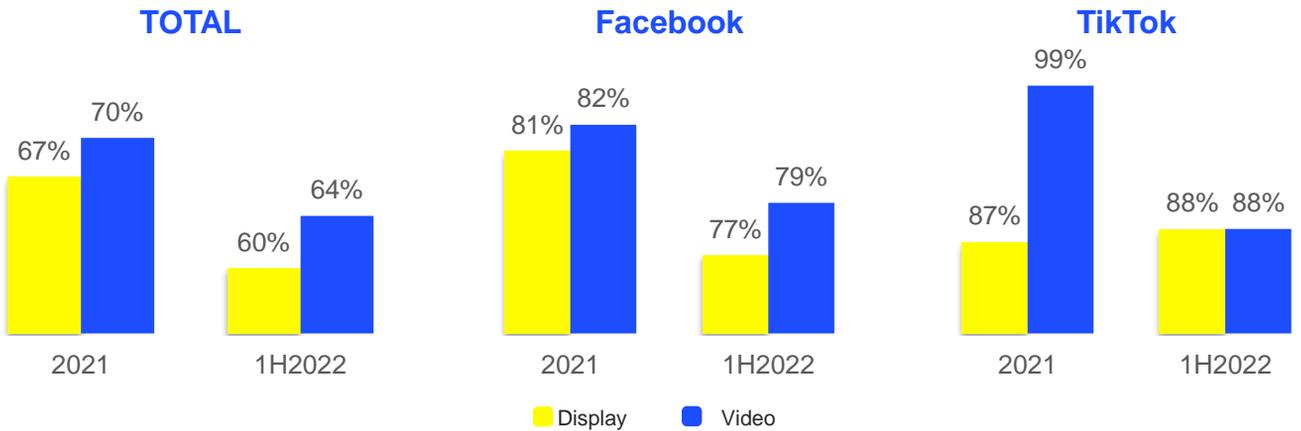
Agency-tracked share of programmatic procurement



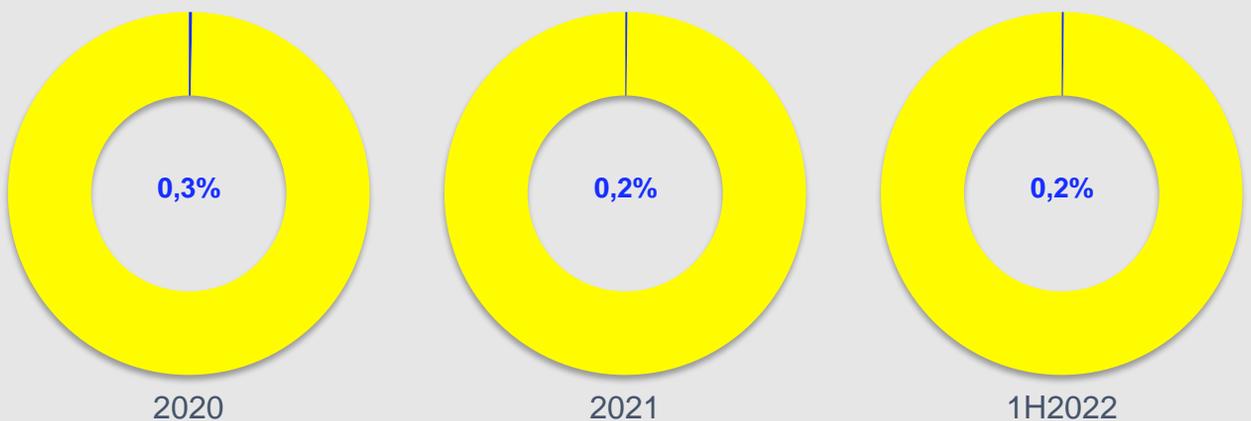
Distribution of mobile/desktop media advertising in the market as a whole and by individual players



The share of mobile display and video ads in the market and among the main players



The share of digital audio



Anastasiya Baydachenko CEO IAB Ukraine



- The war crossed out the positive scenario promised by the incomplete first two months of the year. Despite the market downturn we experienced in March, April began to show some signs of recovery and digital industry began to the process of adapting to operating in realities of war.
- Market equilibrium and dynamics direction are extremely unstable and sensitive to the situation at the front. We believe that due to high adaptability, the industry is capable of rapid recovery and growth restore
- The current methodology does not evaluate the category of classifieds and lead generation, which according to the expert evaluation of IAB Ukraine should add at least 10-15% to the market volume.
- Hypothesis testing of paid search market valuation continues. The influencer marketing and SMM segments are evaluated in separate surveys

The pool of participants

Agencies

AdWork | AMS Agency | [dentsu Ukraine](#) | MediaHead | [Mix Digital](#) | NCG (Nostra Communications Group) | [NEOS](#) | Netpeak | OMD OMD Group | [PROMODO](#) | Publicis Groupe | [RAZOM GROUP](#) | SIGMA | [TMGU](#) | Twiga Digital | [Webpromo](#)

Publishers

1+1 Digital | Ukrainian Media House | [Admixer](#) | Adpartner | HTTPool | MEGOGO | [MGID](#) | nv.ua | [Obozrevatel](#) | online.ua | ukr.net

Assessment methodology



If you have comments, suggestions and additions, please let us know by e-mail anastasiya.baydachenko@iab.com.ua