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Adex 2010

Internet advertising spending in Europe (5th edition)

Key findings



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Adex 2010: key findings

Agenda

- Introduction and methodology
- Top-line figures
- Key trends

Compiled & presented by

- Catherine Borrel, IAB Europe
- Vincent Létang & Daniel Knapp, IHS Screen Digest



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Methodology



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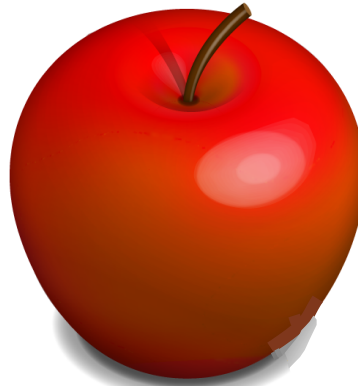
Comparing “apples to apples”

GROSS



Revenue Billed

NET



Revenue Billed
No Agency commissions

RATECARD



Campaigns x
Ratecard



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Key challenges to ensure comparability

- Fair Gross value
- Category representation
 - Display
 - Search
 - Classifieds & Directories
 - Other
- Exchange rate adjustments at a constant rate
- Introduction of mobile display and mobile search



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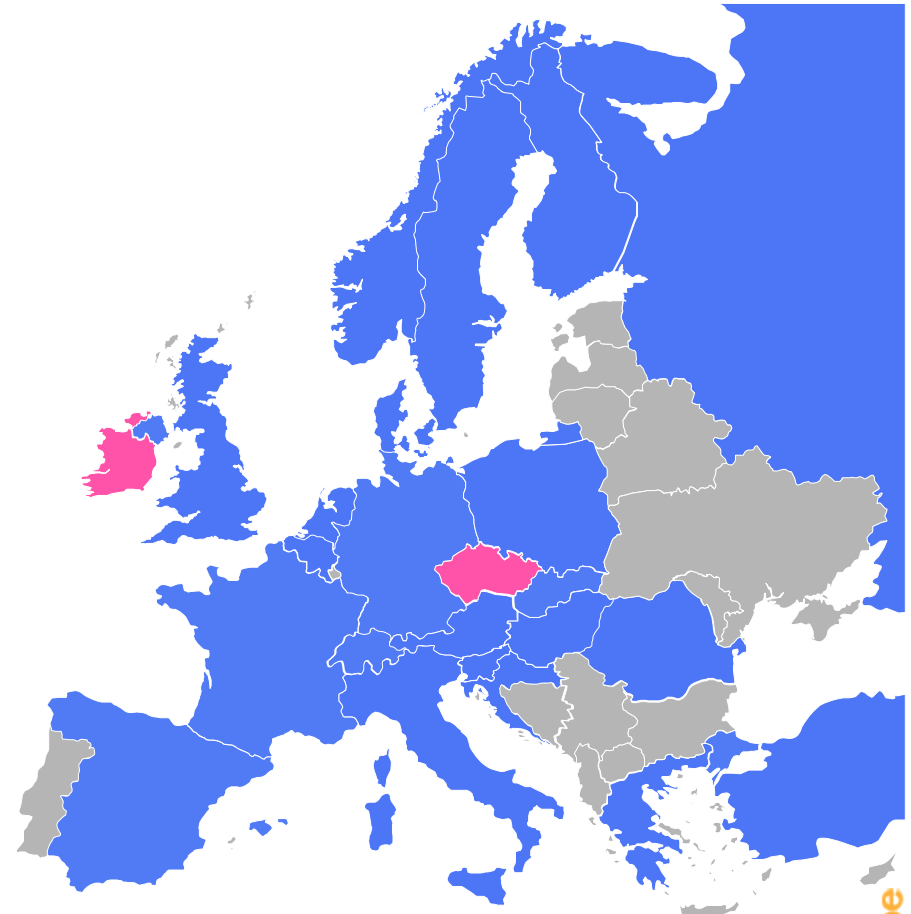


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Our coverage now includes 25 countries

- Austria
- Belgium
- Bulgaria
- Czech Republic
- Croatia
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Netherlands
- Norway
- Poland
- Russia
- Romania
- Slovenia
- Slovakia
- Spain
- Sweden
- Switzerland
- Turkey
- UK



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Topline Figures



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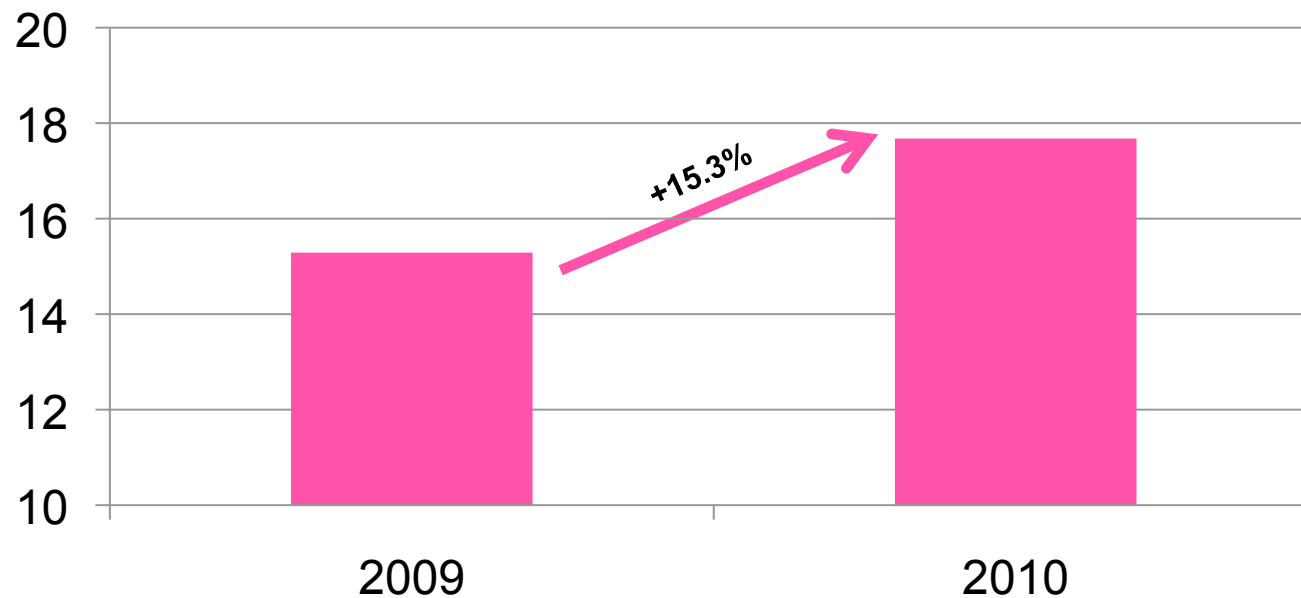
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Overall growth: 15.3%

- At constant country sample (25 countries of 2009 and 2010)
- At constant exchange rate

Total online advertising (€bn)



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Key facts and figures

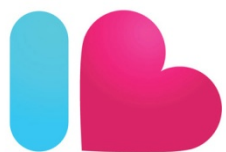
- A €17.7bn market
- Internet advertising back to double-digit growth
 - Re-accelerating to +15.3% in 2010
 - 2009: +4.5%, 2008: +20%
- Internet now contributes 18% to all-media adspend
- Online Display showing the strongest growth: + 21.3%



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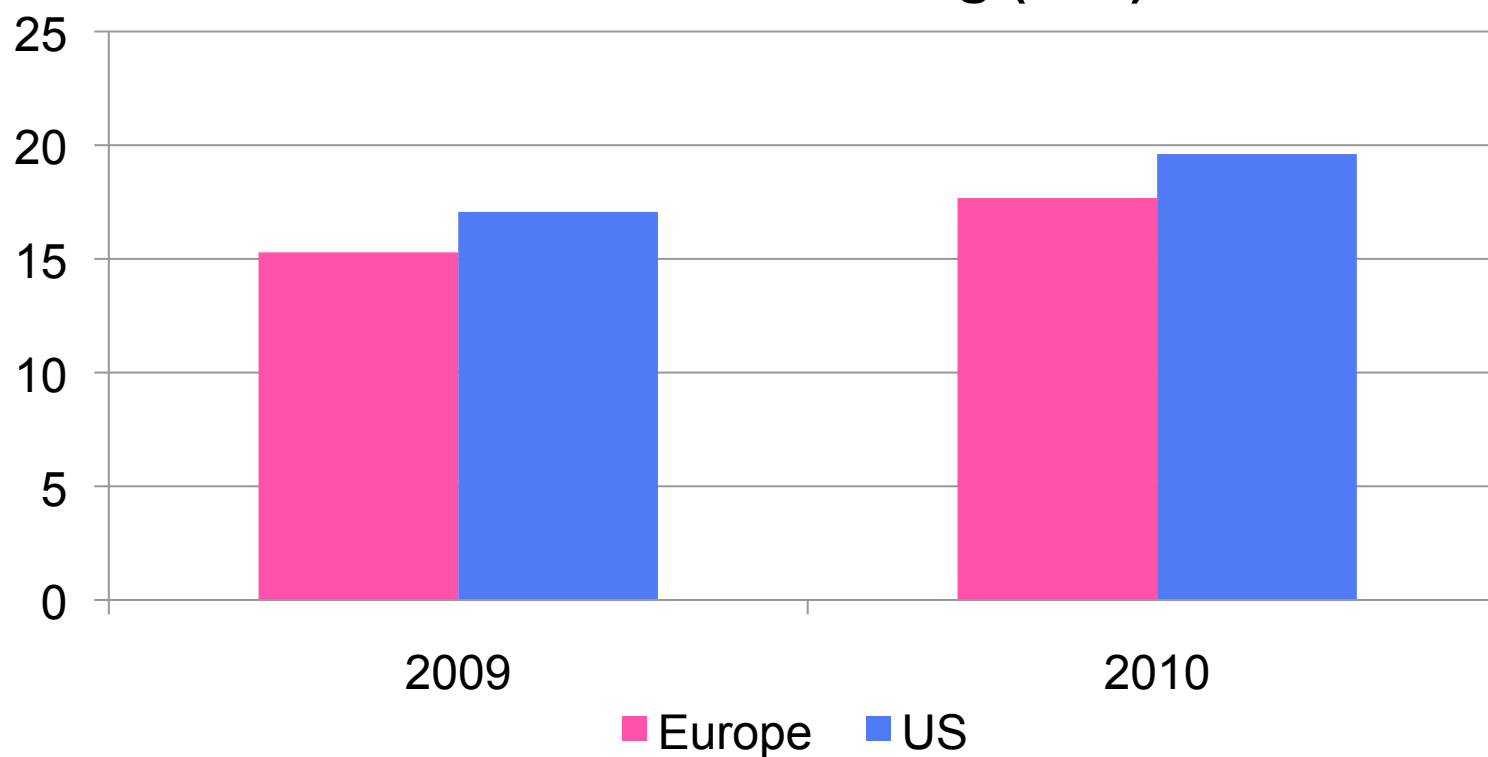


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Europe continues to chase the US

Total online advertising (€bn)



Constant exchange rate: average 2010: 1 EUR = 1.3279 USD



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Display drivers

- New formats/platforms: video, social, mobile
- Innovation in targeting, audience measurement and banner formats
- General renaissance of branding campaigns and display media



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Key Trends (segments, markets)



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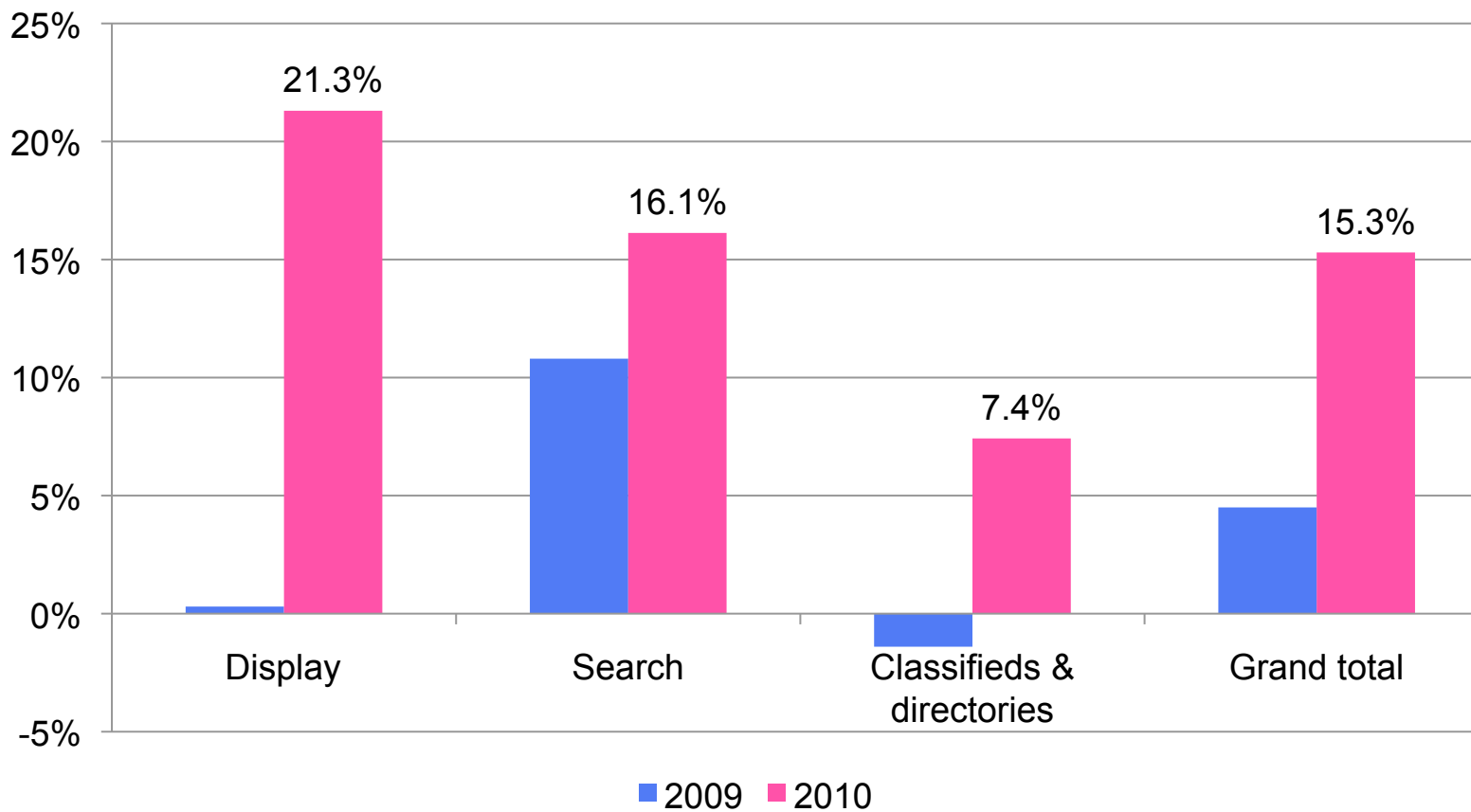




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Segments: display beats search growth in 2010...



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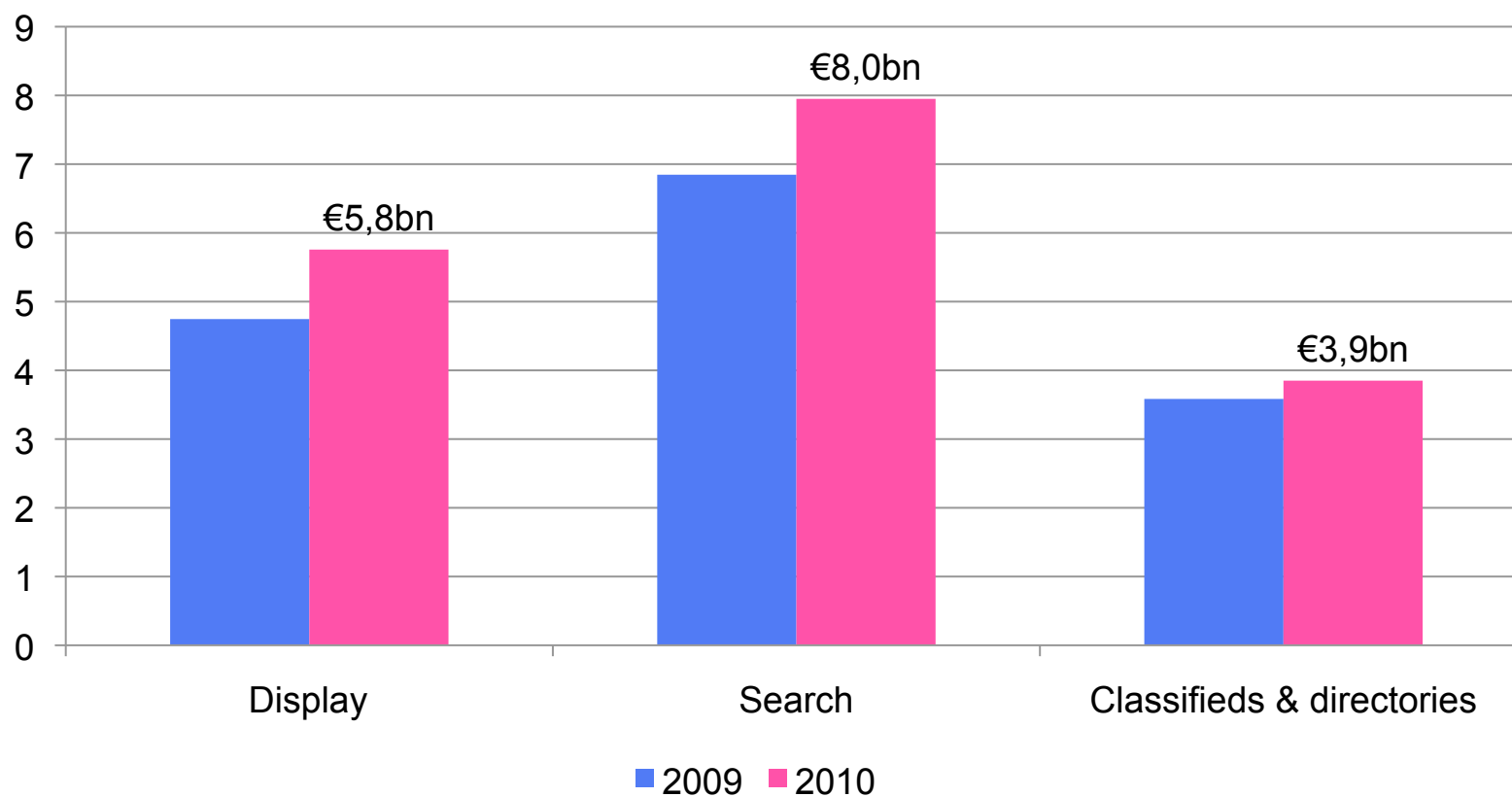




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...but search remains the larger segment



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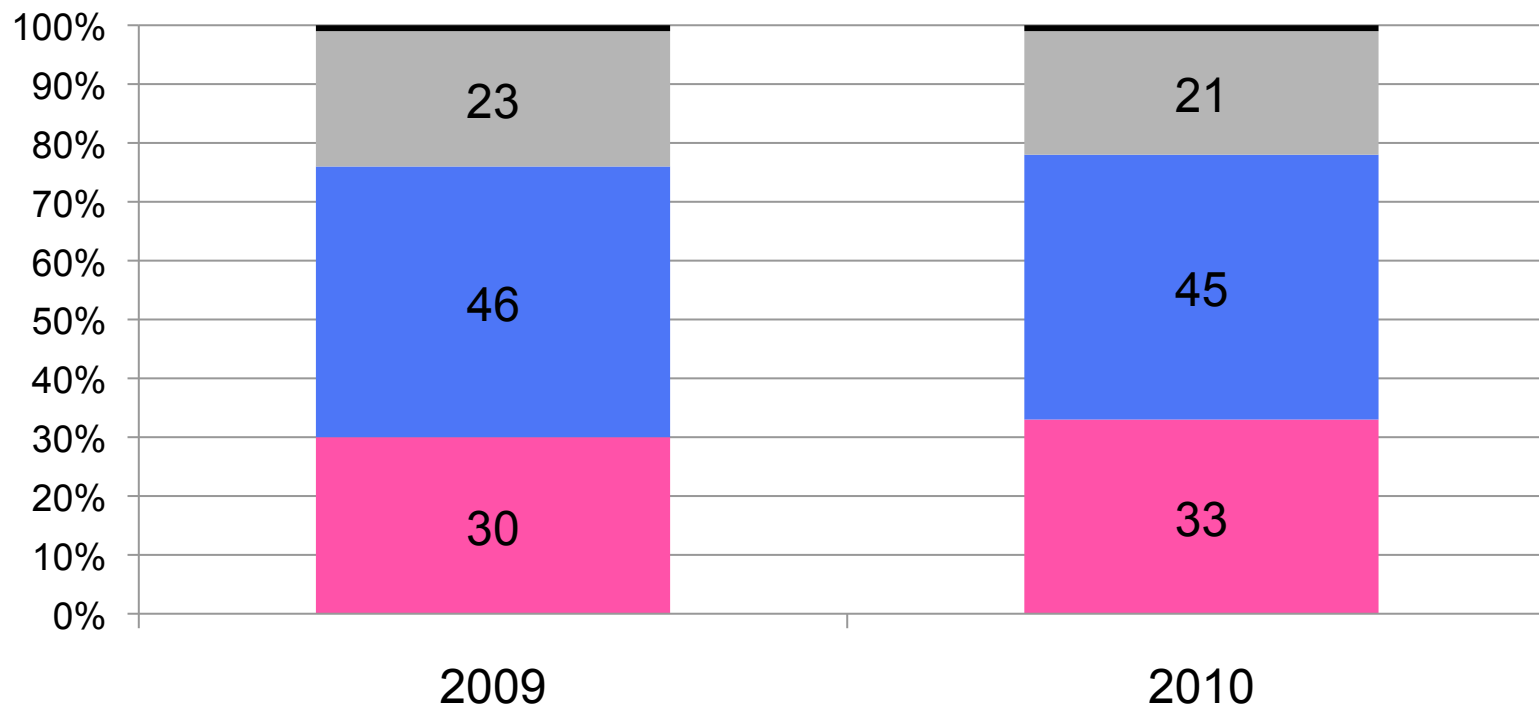


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...however, display increased its share to 33%

Segment market shares (%)



■ Display ■ Search ■ Classifieds/Directories ■ Other



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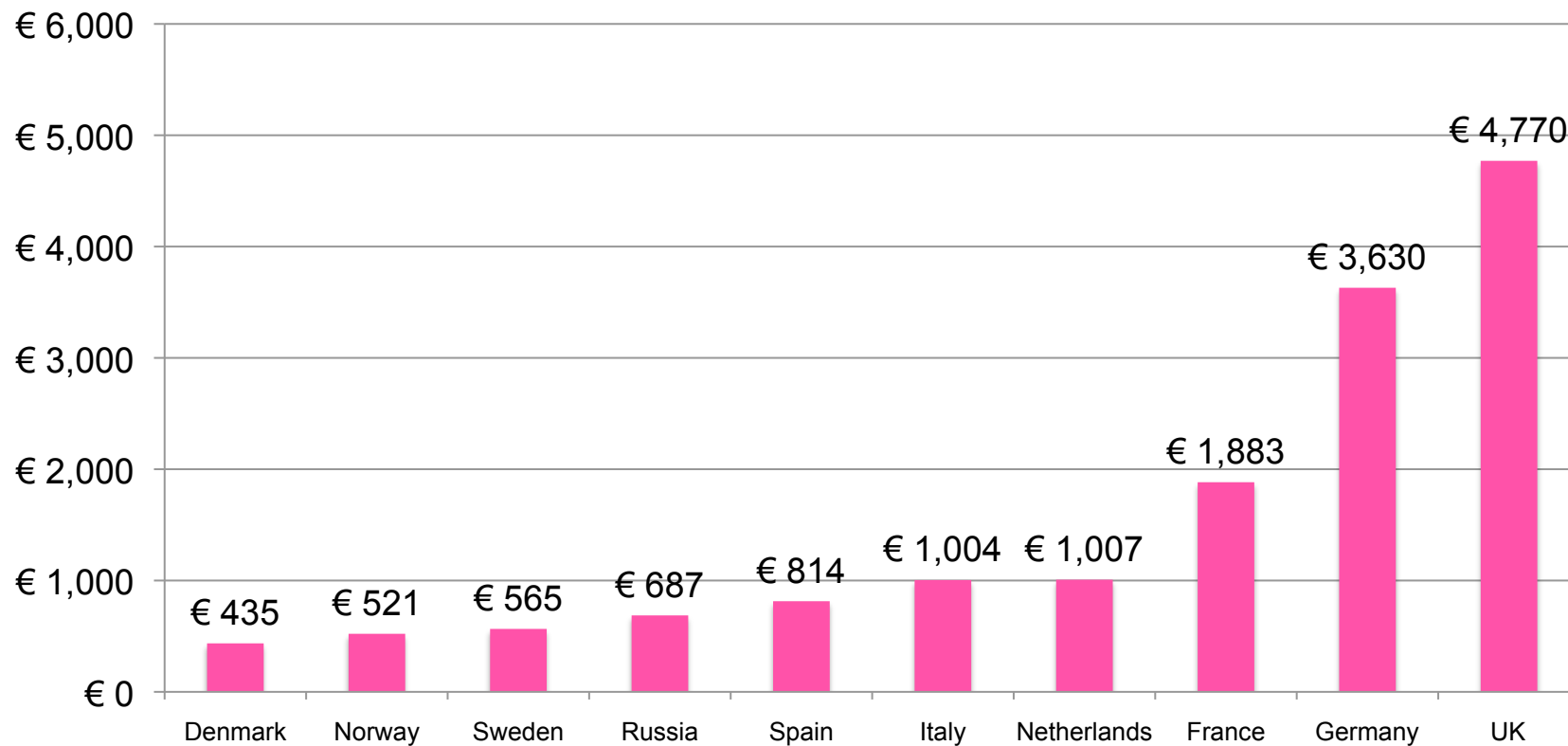


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Markets: The top 6 make 74% of total adspend

Total online adspend in €m



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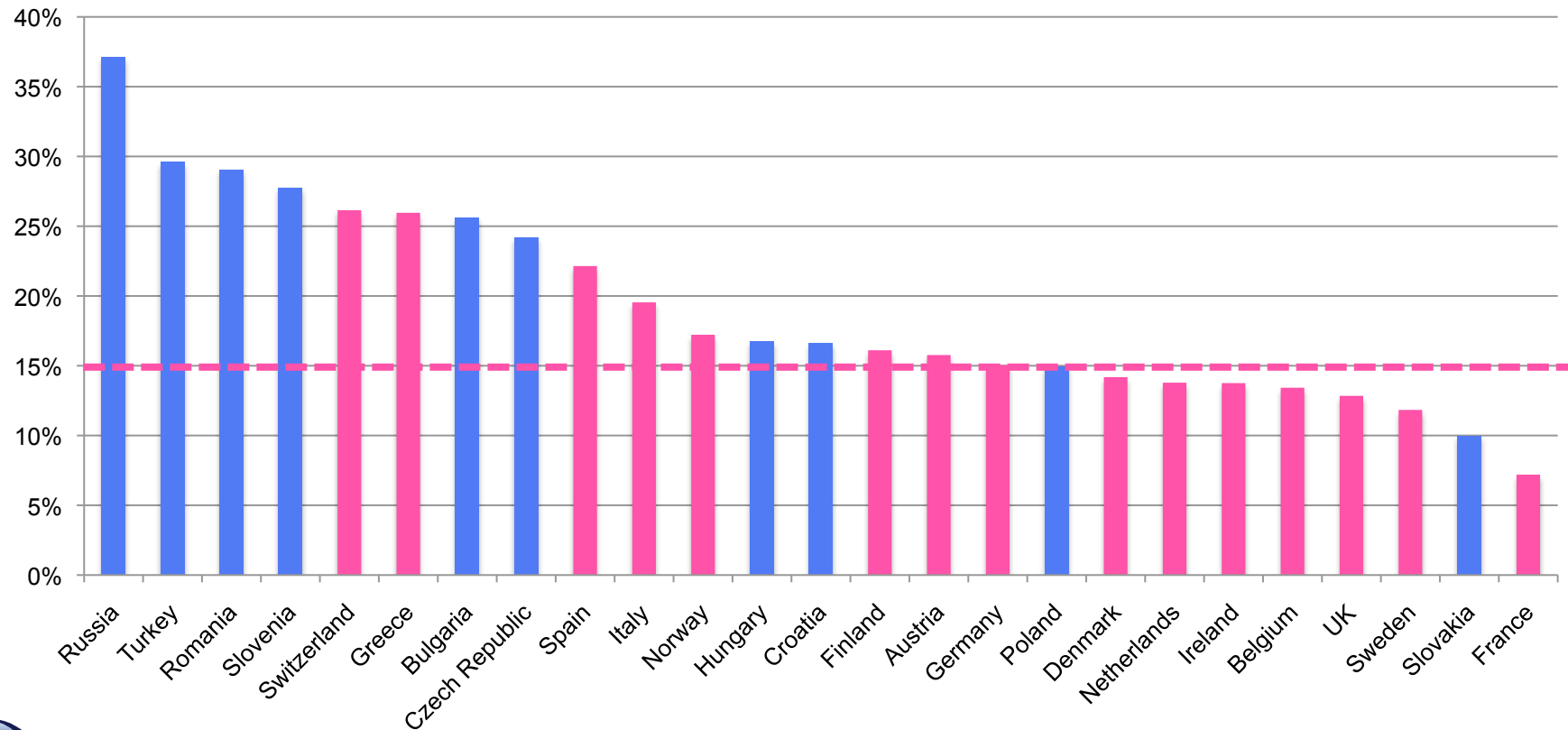


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Comparing Markets (1): CEE is catching up

Total online advertising growth 2009 – 2010 (%)



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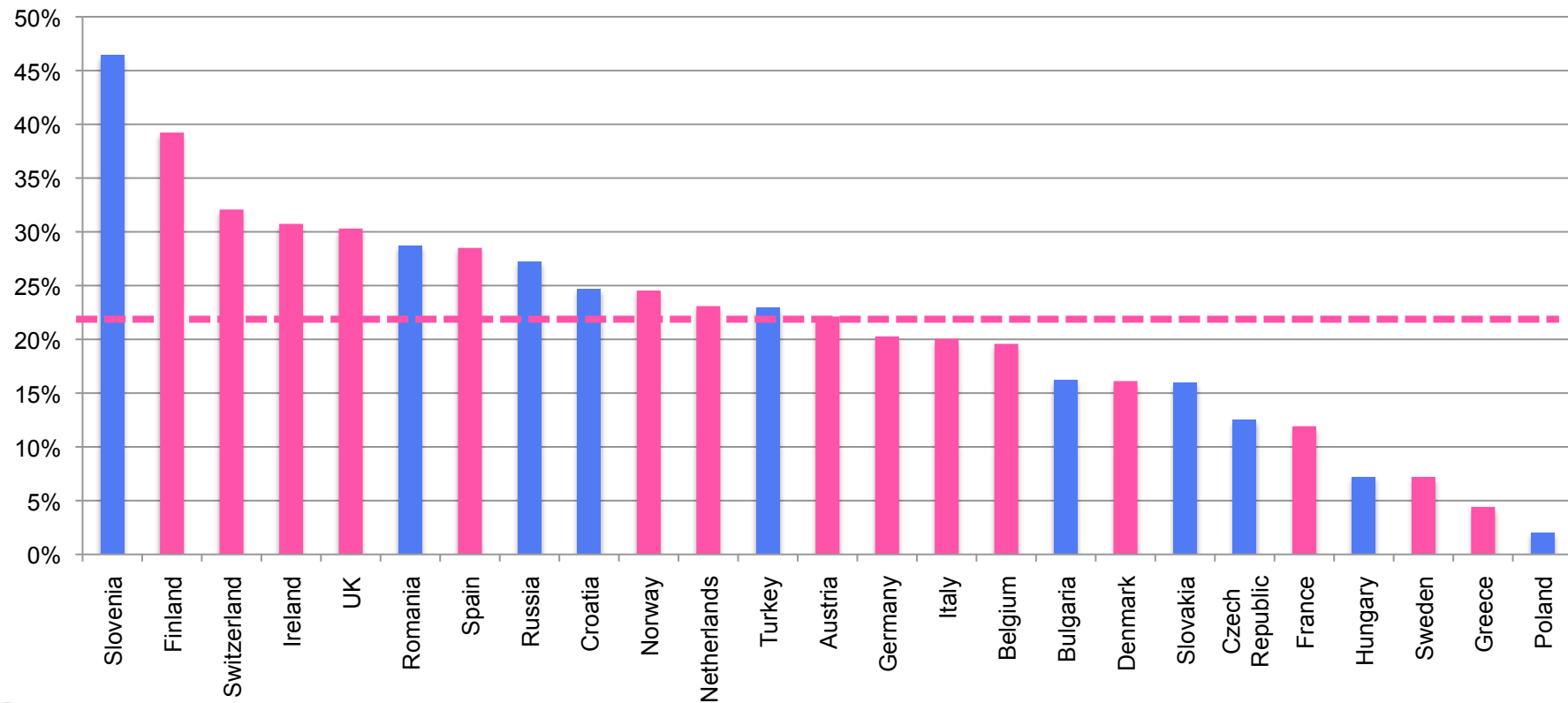


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Comparing Markets (2): Display surges in East & West

Online display advertising growth 2009 – 2010 (%)



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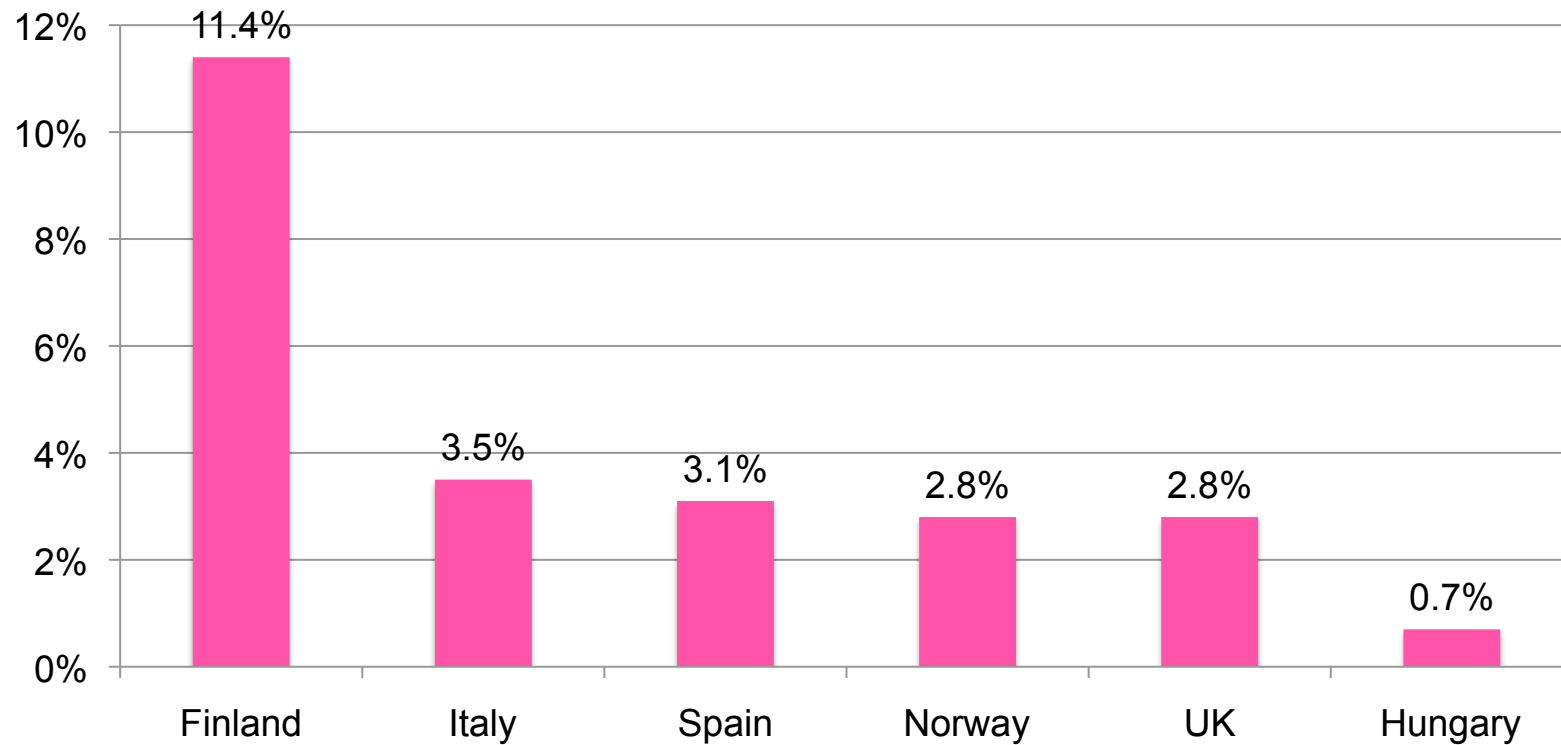


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Mobile display enters the mainstream

Mobile display adspend in proportion of total display (%)



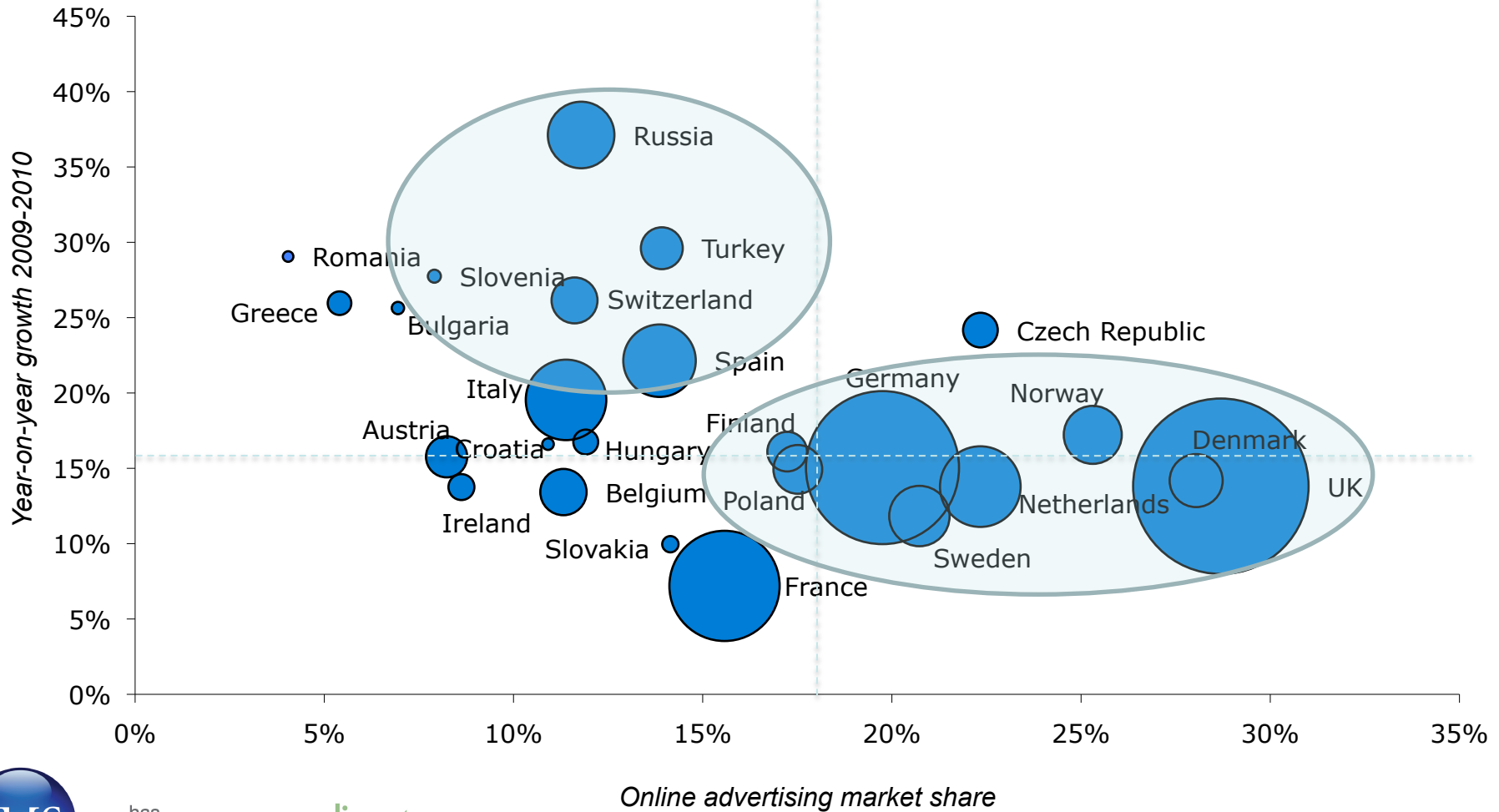
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Market: Growth and maturity



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Online advertising market share

*Calculated using WARC & IHS Screen Digest data

