



INTERACT CONGRESS
BARCELONA
2010

BRANDING ONLINE: THE TIME IS NOW
2-3 June 2010

Ad Ex 2009

Internet advertising spending in Europe



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Agenda

- Topline figures
- Methodology
- Key trends



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Topline Figures



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The Results

14.7 billion euros



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Key facts and figures

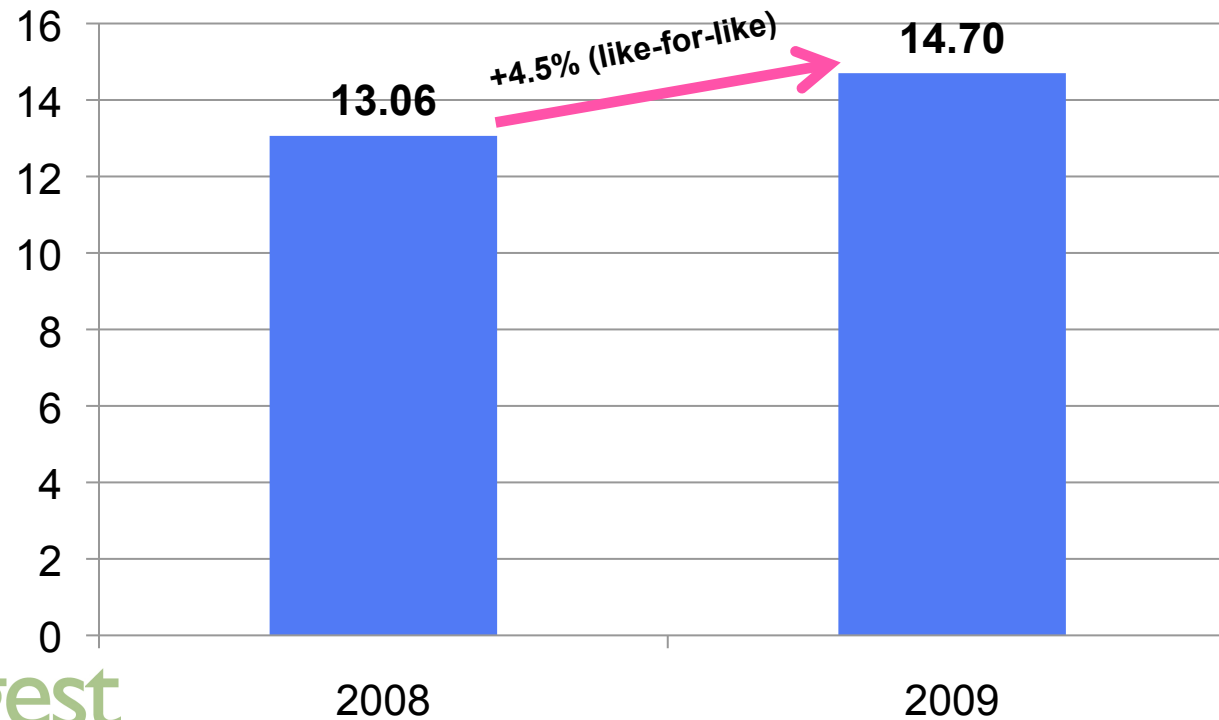
- €14.7bn market compared to €16.2bn in the US
- Growing +4.5% like-for-like, a slow-down from +20% in 2008
- But still outperforming all other media categories
- Internet now contributes 18% to all media ad spend



A like-for-like growth rate of 4.5%

- At constant country sample (19 countries of 2008)
- At constant exchange rate

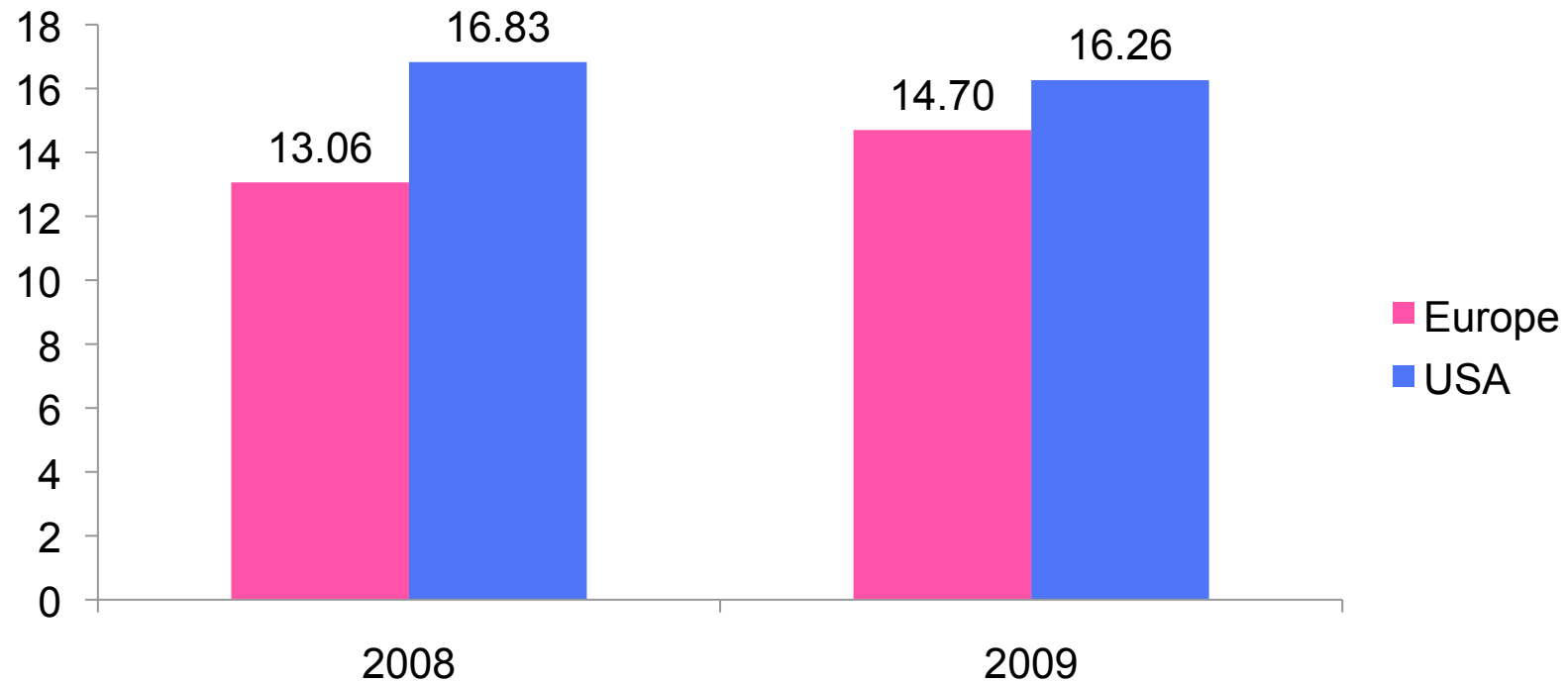
Internet adspend in €bn





Europe catches up with the US as the US market declined in 2009

Total online ad spend Europe vs. USA (€bn)





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Methodology

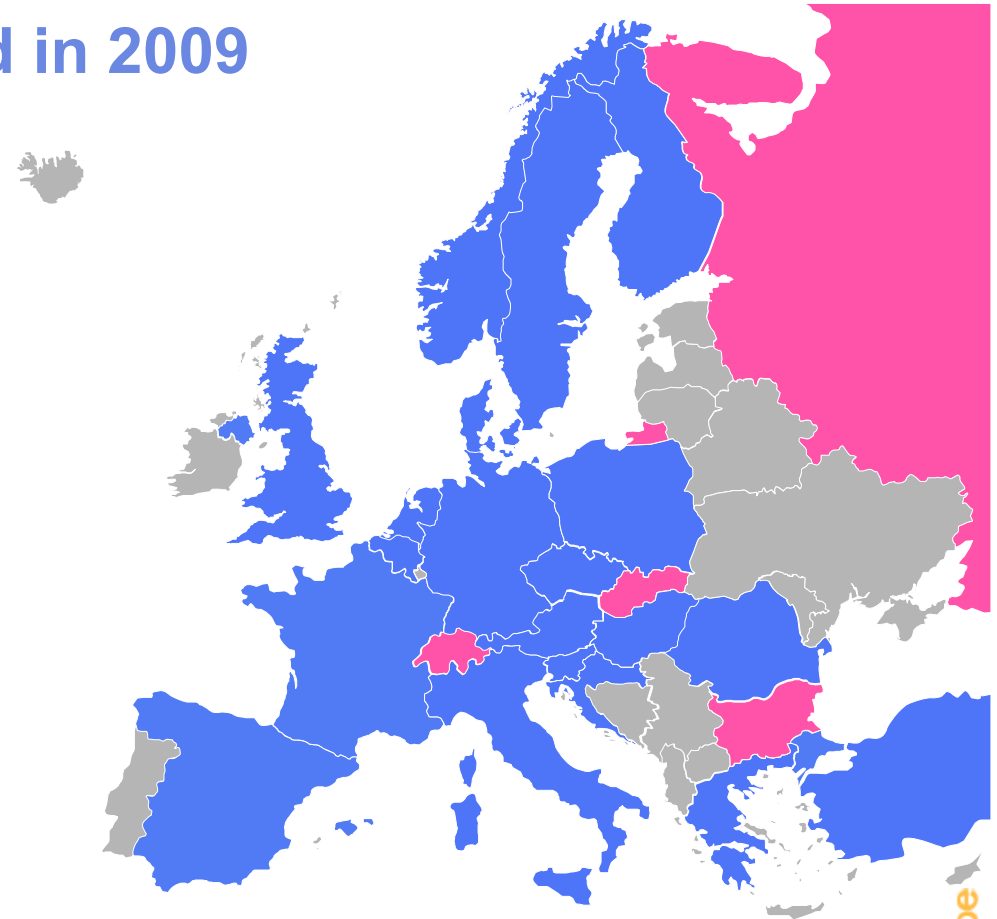


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Our European coverage now includes 23 countries Four new countries added in 2009

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



*New in 2009



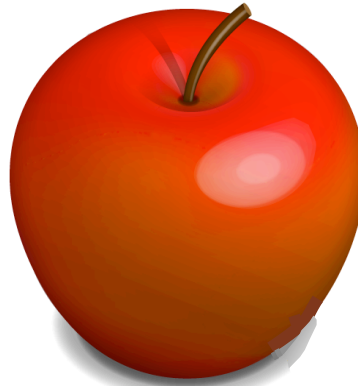
Comparing “apples to apples”

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



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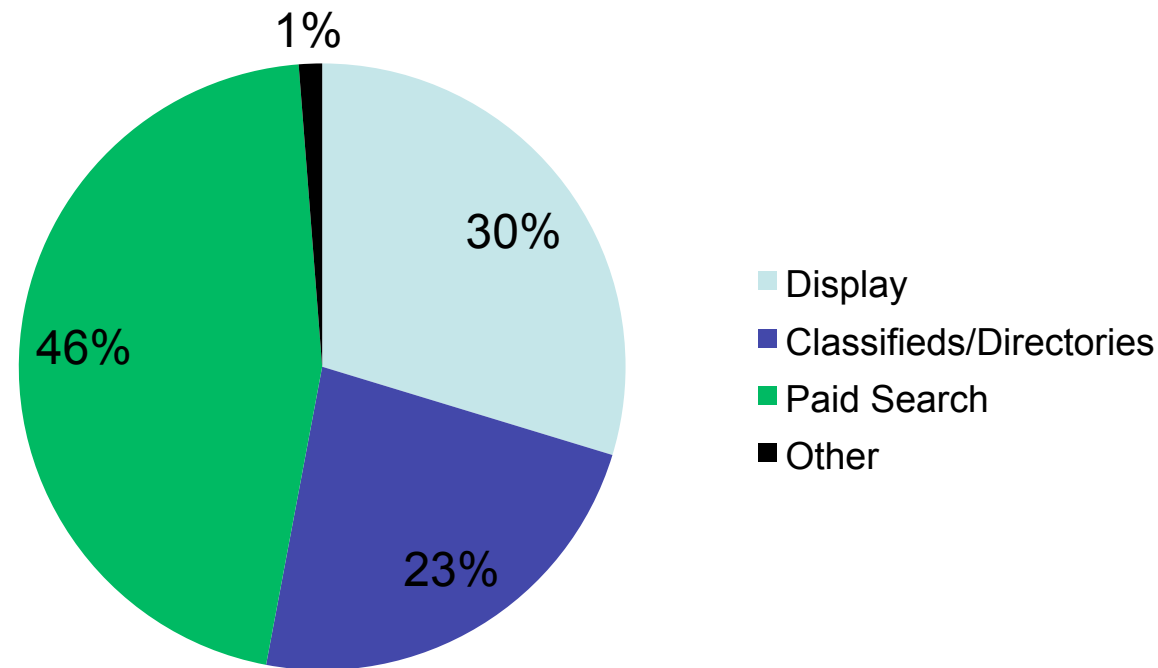
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Key Trends



Formats: Search strengthens lead with 46% share

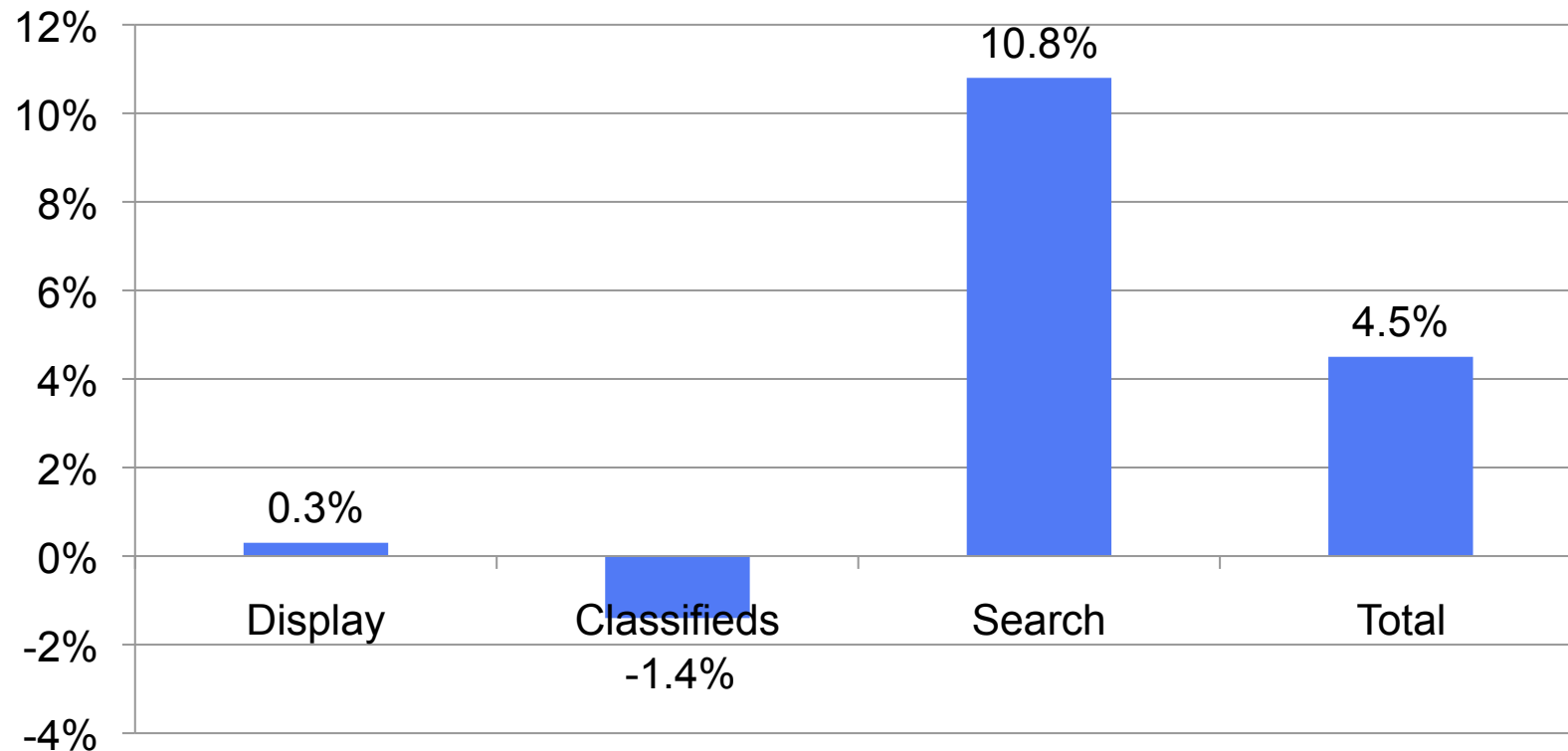
2009 internet adspend by segment





Formats: Search drives growth during recession

Growth of formats in 2009 (like-for-like)



Note: Like-for-like growth is calculated excluding the new submissions (Bulgaria, Slovakia, Switzerland and Russia) for which no data was available in 2008.

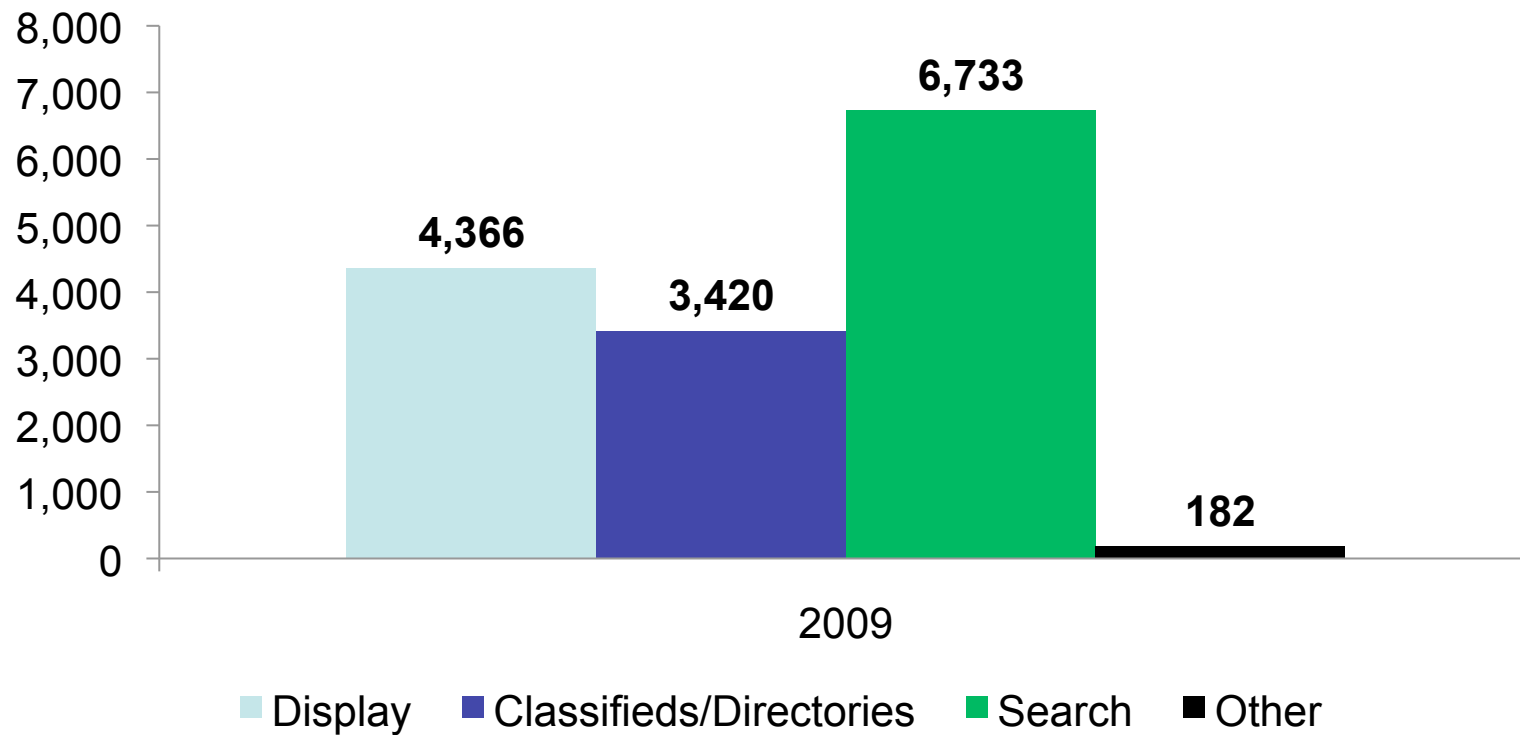


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Formats: Search nears €7bn

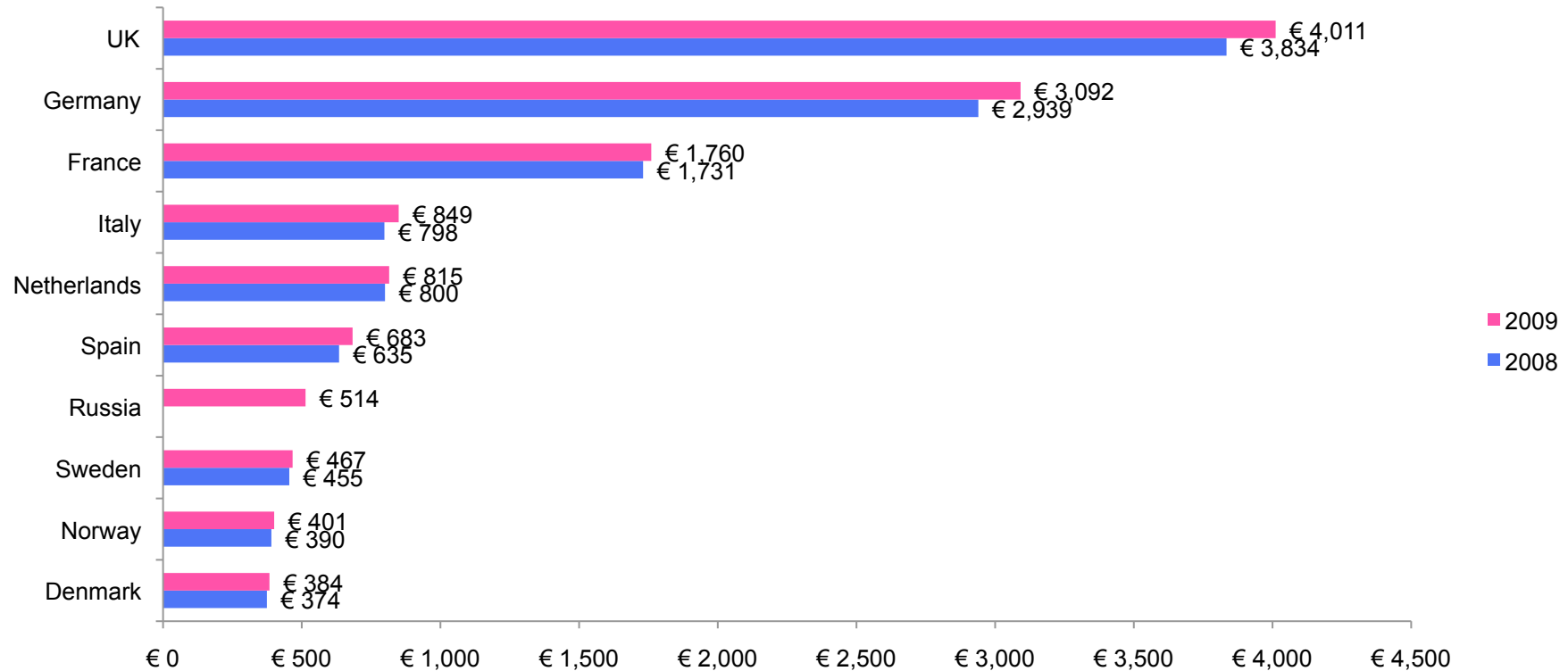
Internet adspend in €m





Markets: The top 6 countries make up 76% of the total

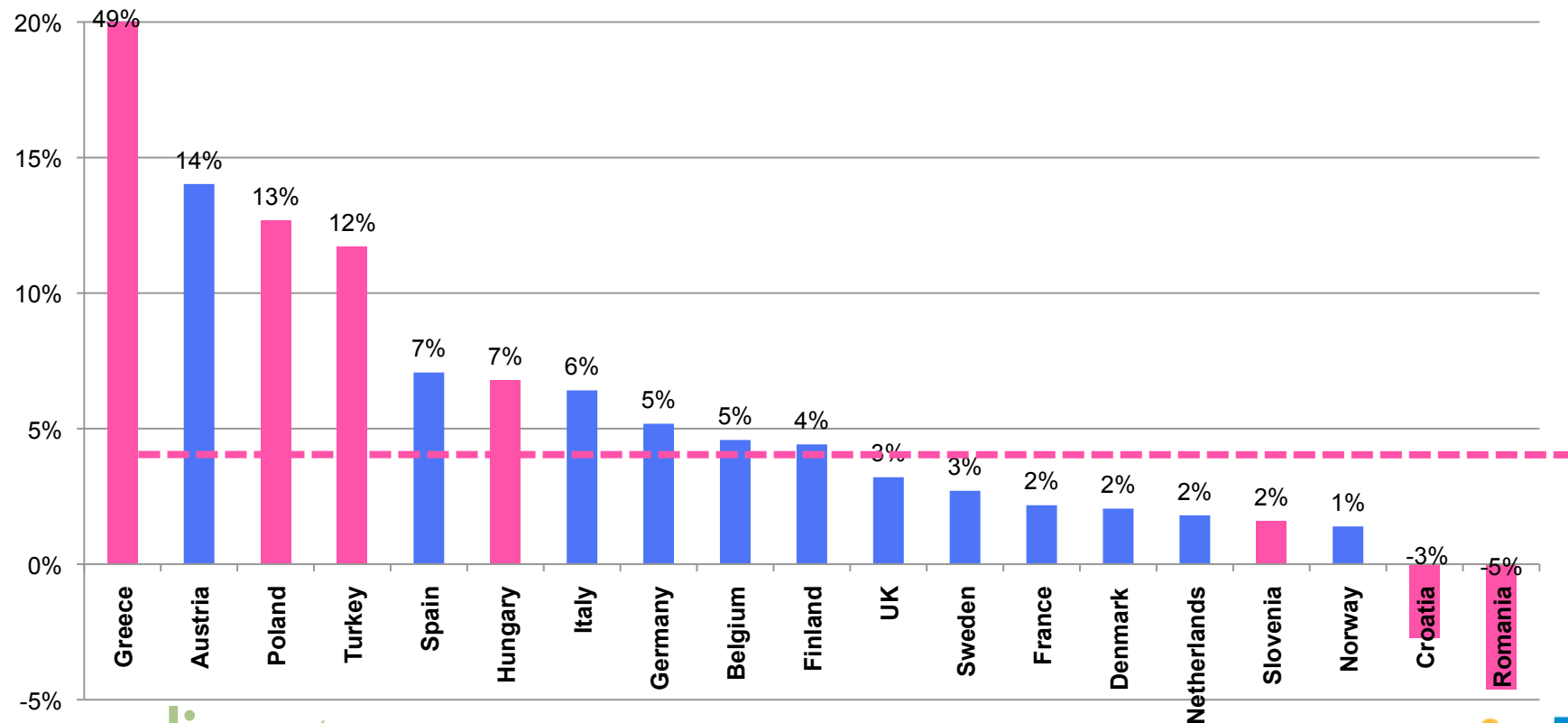
Online ad spend by country 2008 vs. 2009 (€m)





Markets: contrasting trends among emerging markets

Total growth by country from 2008 to 2009





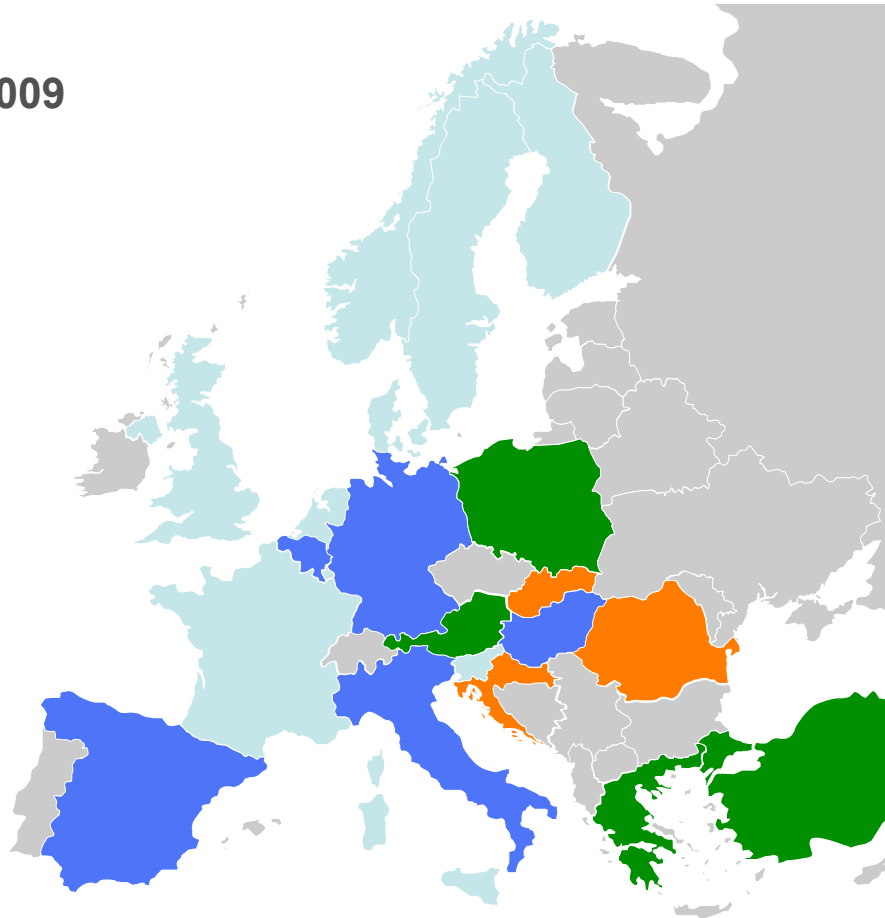
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Markets: contrasting trends among emerging markets

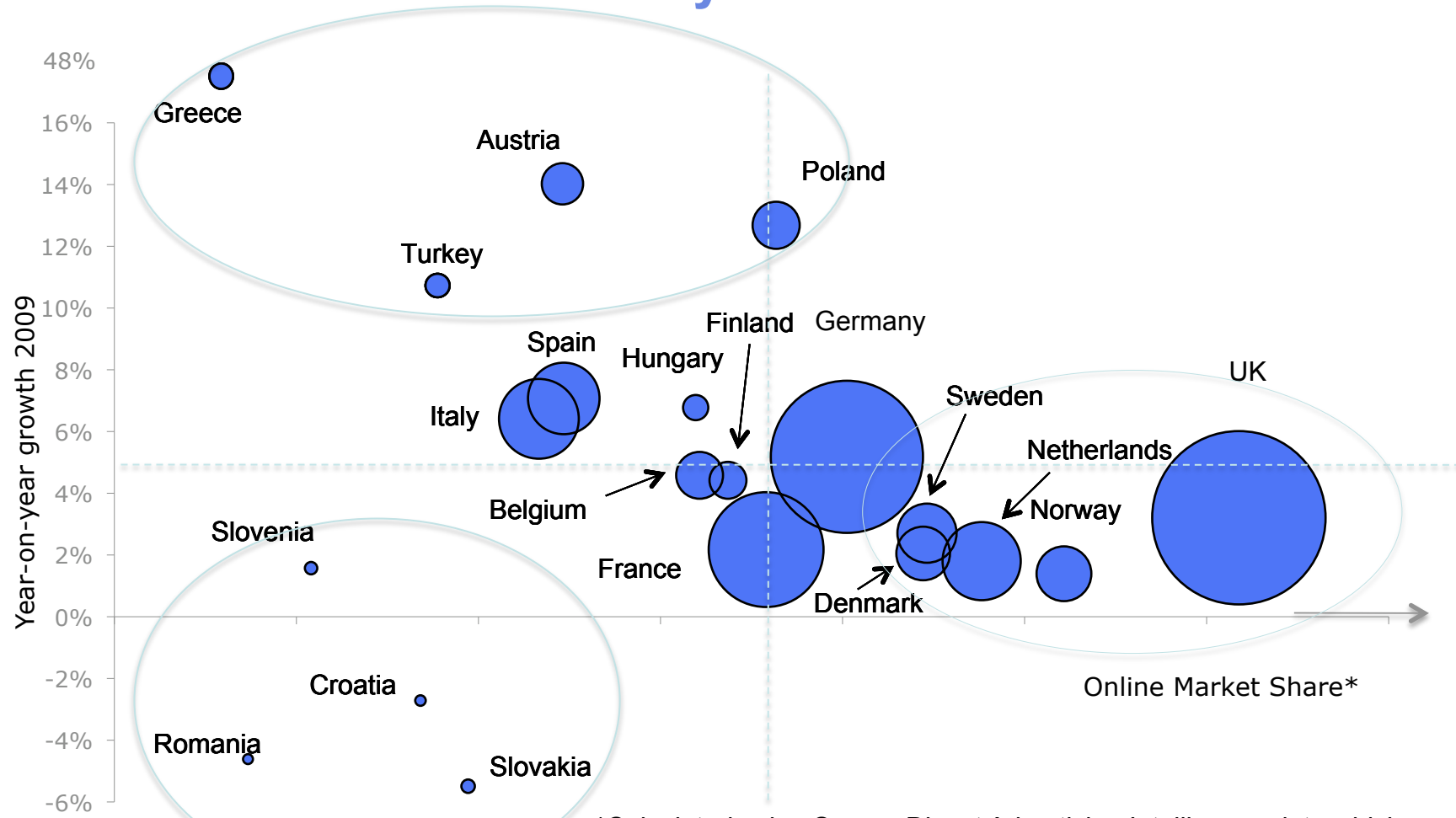
Online adspend growth 2009

- +10% and above
- +5% to +10%
- 0% to +5%
- 5% to 0%





Market: Growth and maturity



*Calculated using Screen Digest Advertising Intelligence data which incorporates TV, print, radio, outdoor and cinema advertising



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Thank you

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