



Interact 2009 : Digital Advertising gets Innovative

Interact Congress  
10th - 12th June 2009



# IAB Europe

## AdEx 2009

10 June 2009



## Our European coverage now includes 19 countries



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

\*New in 2008

## Comparing “apples to apples” required – e.g. in terms of format

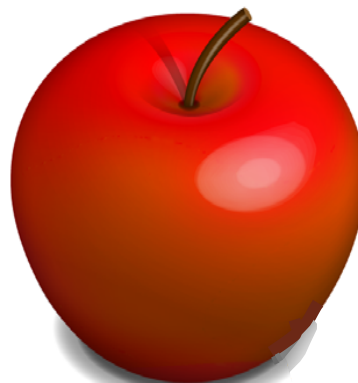
GROSS



Revenue Billed

No adjustment

NET



Revenue Billed  
No Agency commissions

Add in local estimate  
of agency  
commission  
for relevant formats

RATECARD



Campaigns  
x Ratecard

Need to discount  
ratecard to actual  
based on  
expert input from  
local IAB

## The Results

**€12.9 Billion Euros**

**Like for like growth of 20%**

---

The results show continued growth in an overall declining European ad market

### Total Online Advertising 2006 - 2008

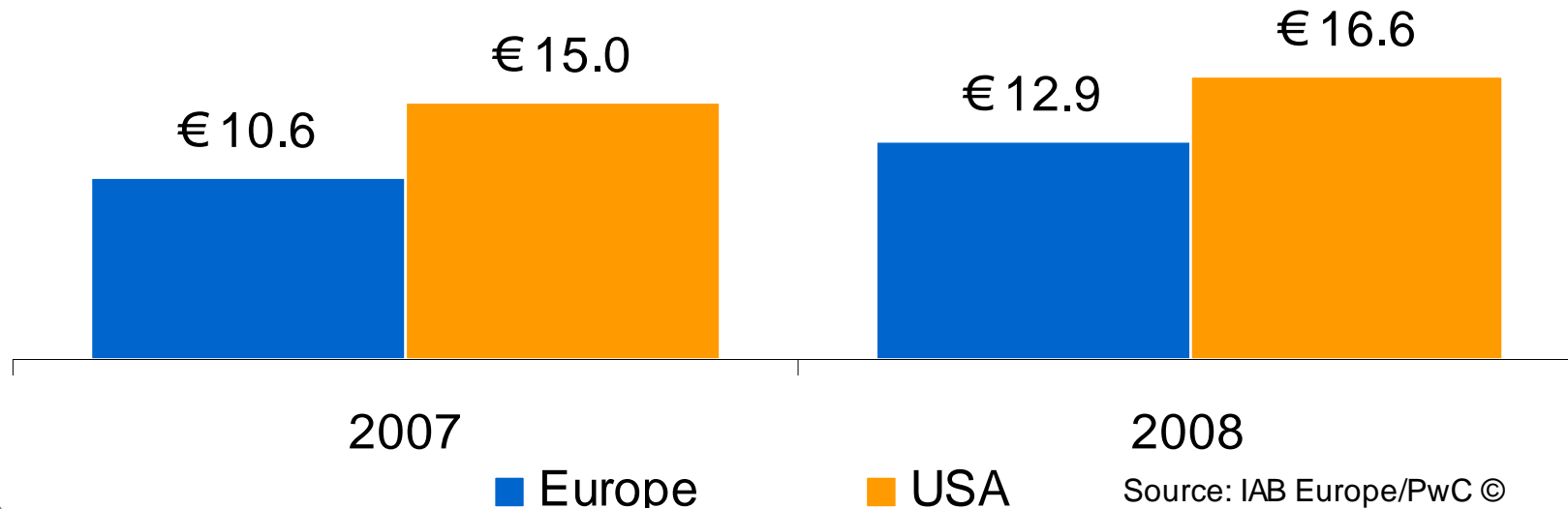
(billion Euros)



Source: IAB Europe/PwC ©

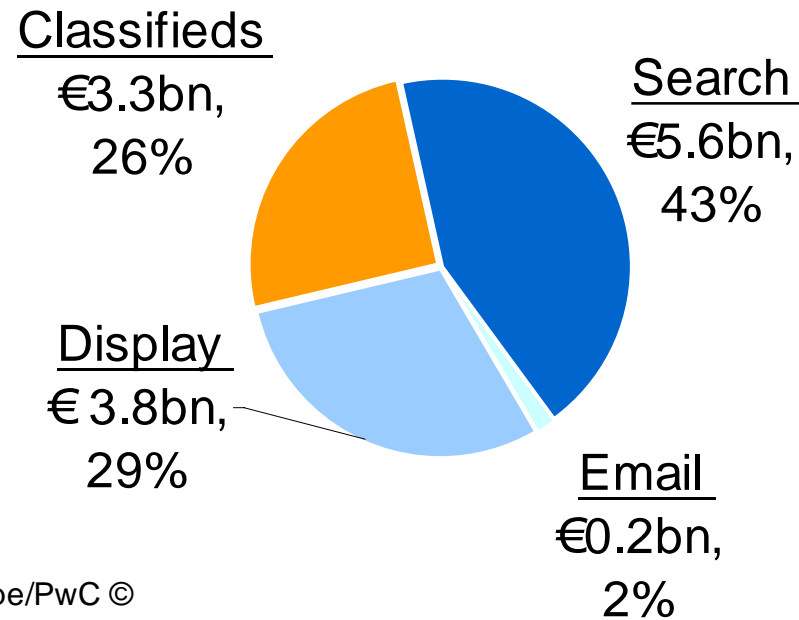
The gap to the USA has further narrowed in 2008, reflecting stronger growth in Europe

### Total Online Ad Spend Europe vs USA 2007 and 2008 (billion Euros)



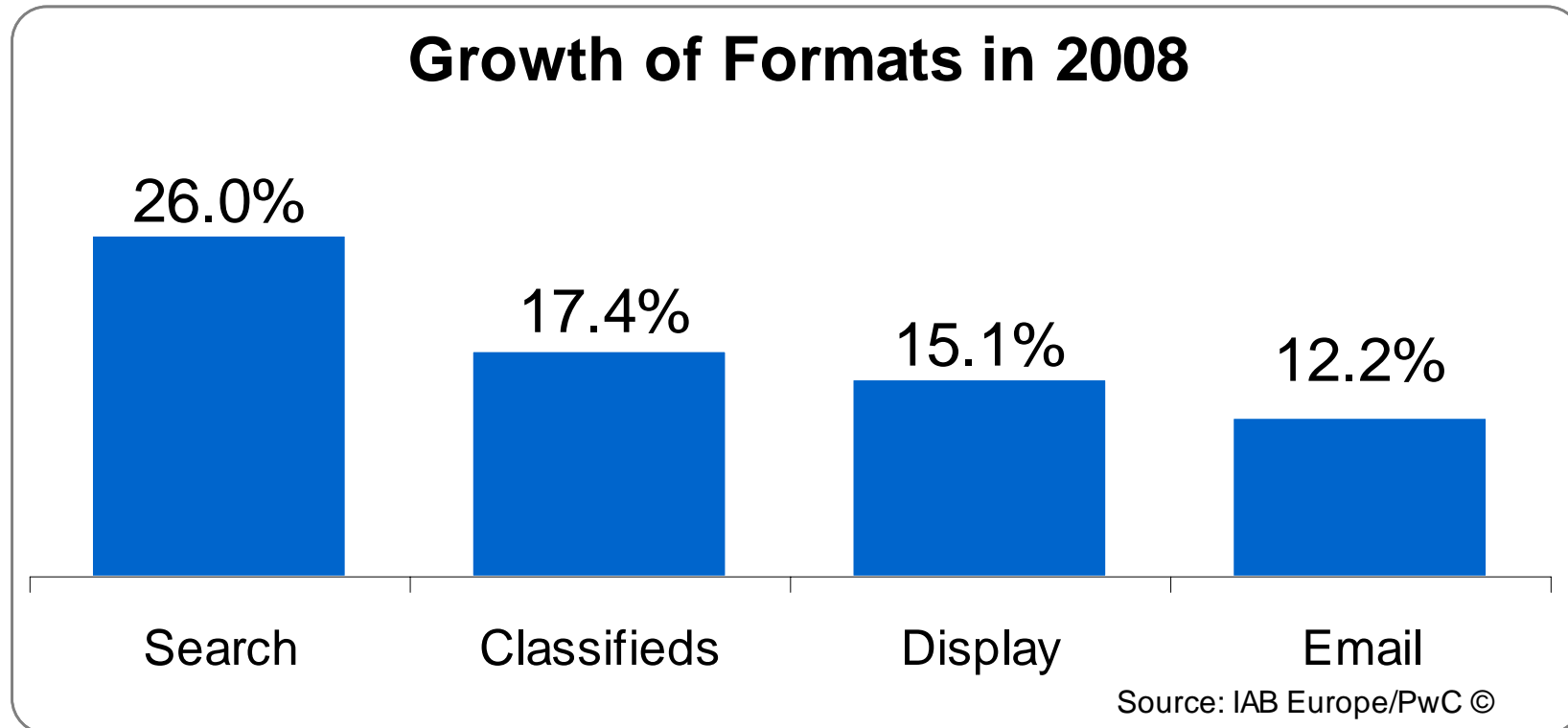
## Search remains the leading format with a share of 43%

### Share of formats 2008



Source: IAB Europe/PwC ©

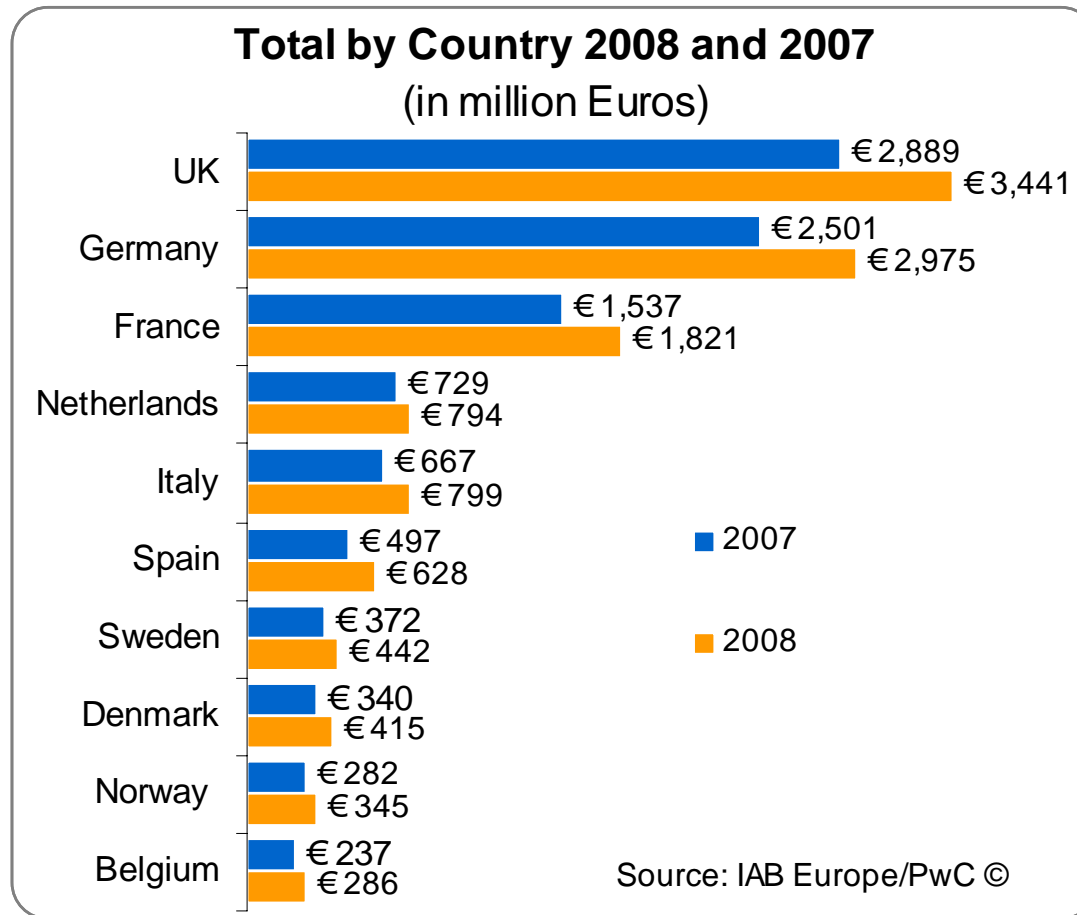
## Search also enjoyed the highest like-for-like growth



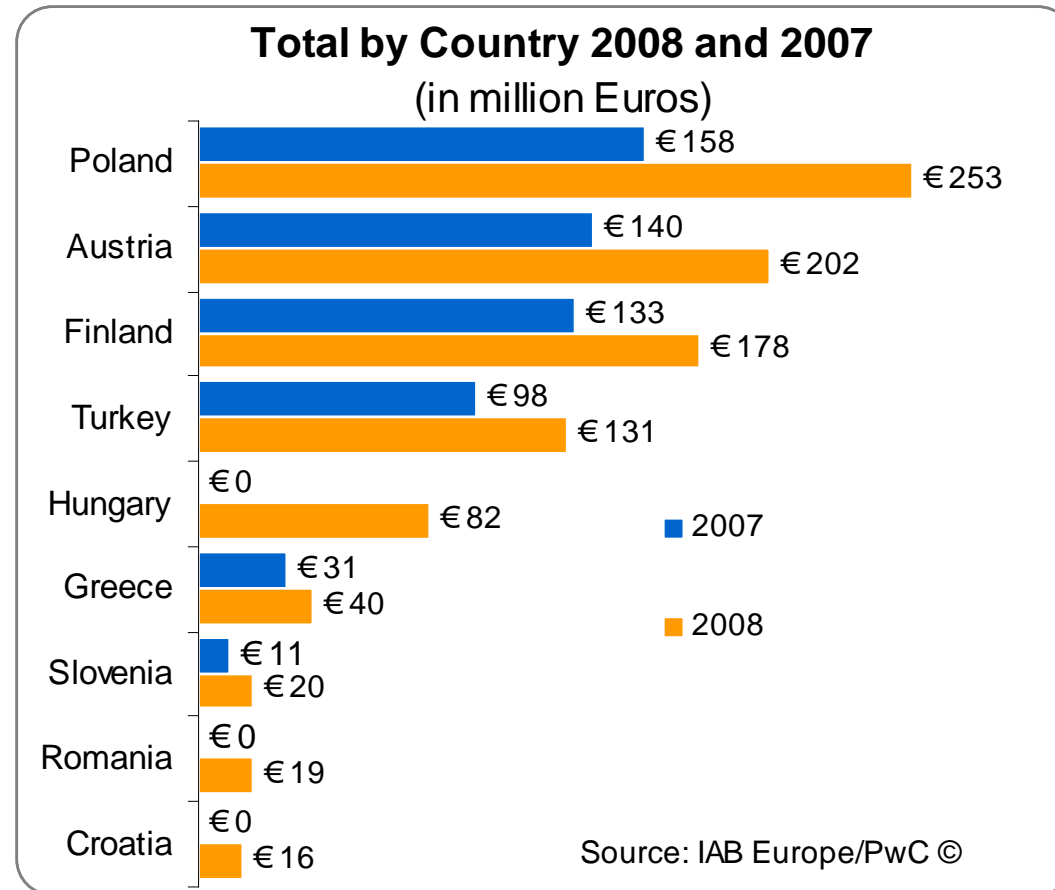
Note: Like-for-like growth is calculated excluding the new submissions (Croatia, Hungary and Romania) for which no 2007 data was available



## The largest 6 countries make up 81% of the total

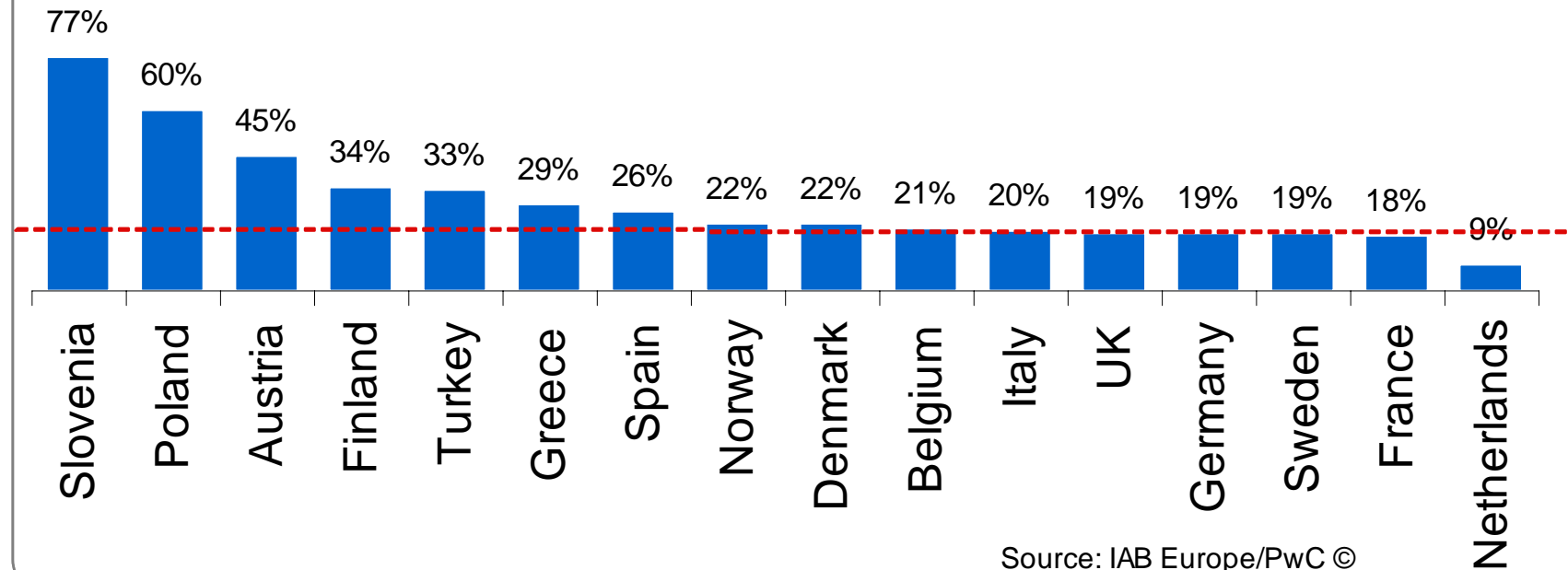


## Markets outside the top 10 have seen the strongest growth

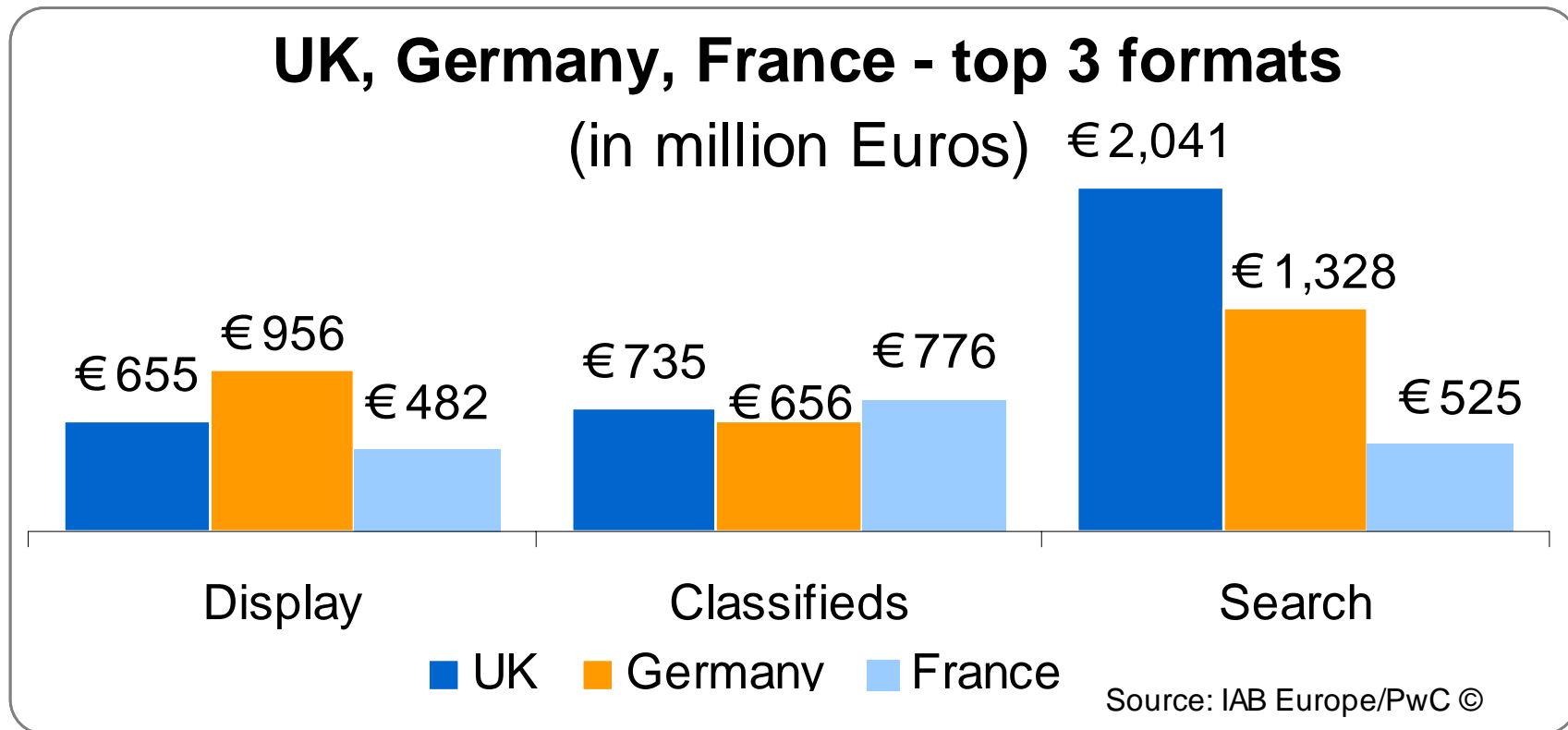


Growth by country varied significantly with “younger” online markets in the East generally outperforming

**Total growth by country from 2007 to 2008**



**UK remains leading search market and Germany leading display market – but France is catching up with both**



Note: Classifieds in France and Germany are an AdEx estimate, including classifieds and directories (as they do in UK)