

AdEx

Internet advertising spending in Europe

2009

KEY FACTS & FIGURES

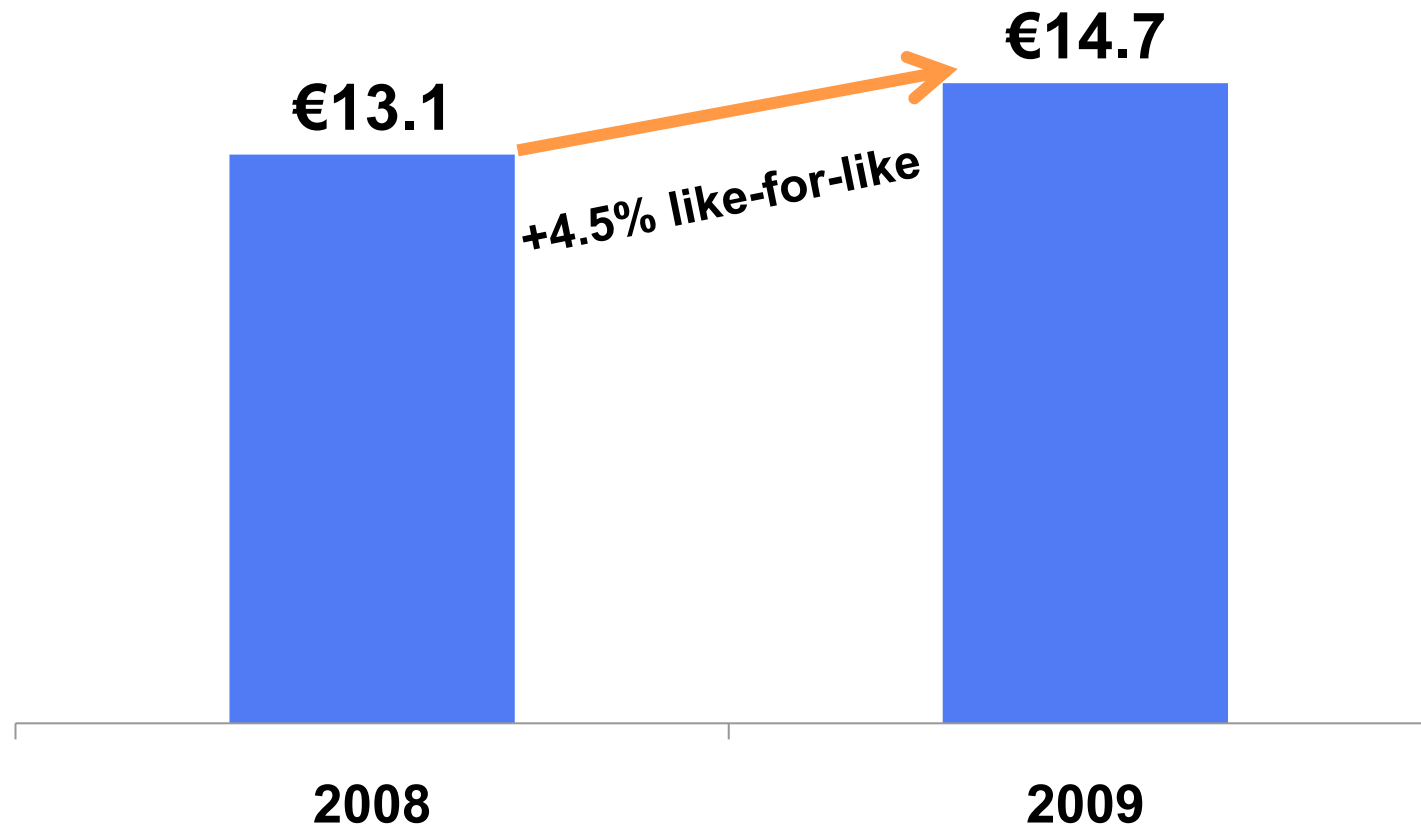
- €14.7bn market compared to €16.2bn in the US
- Growing +4.5% like-for-like, a slow-down from +20% in 2008
- But still outperforming all other media categories
- Search still growing +11% whilst display was flat (+0.3%) and classifieds down (-1.4%)

ABOUT THE REPORT

- Compiled using national IAB data
- Processed to ensure comparability by independent market analysts Screen Digest
- Sums represent actual monies spent including agency commission (Gross value)
- Data collected for Display, Search, Classifieds & Directories and some mobile advertising where available

ONLINE ADVERTISING SPEND GROWS 4.5%

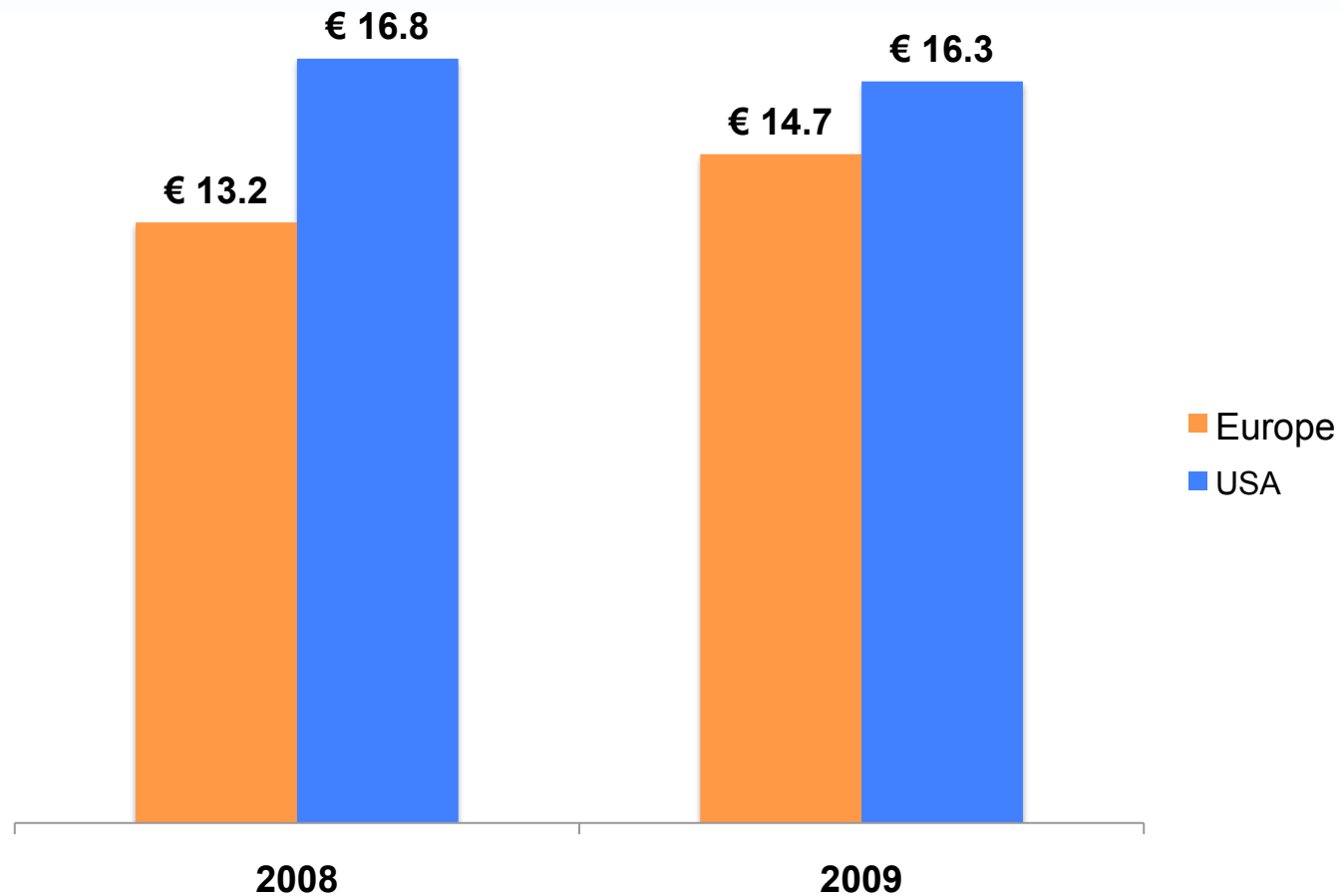
Internet adspend in € billion



Source: IAB Europe / Screen Digest

EUROPE CATCHES UP WITH US

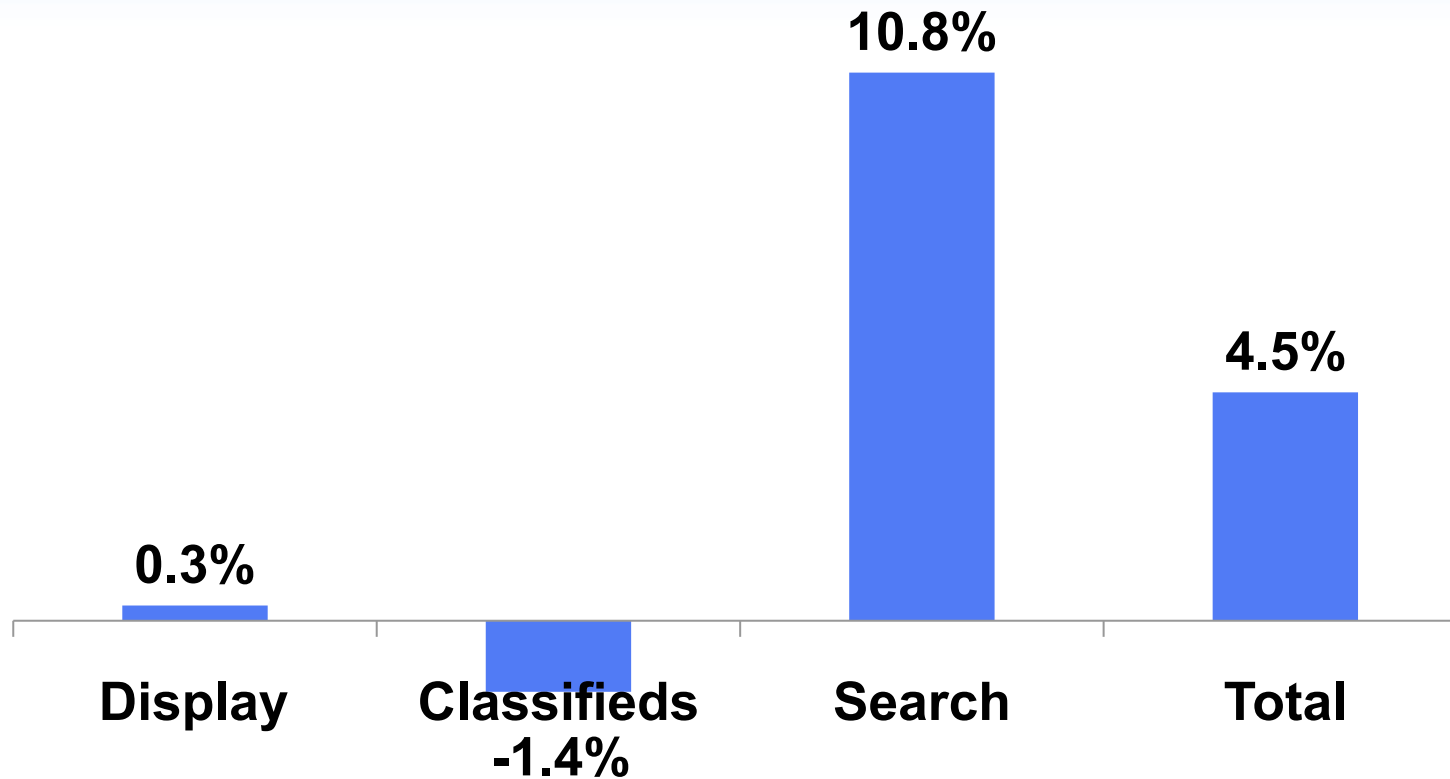
Europe catches up with the US as the US market declined in 2009
(€ millions)



Source: IAB Europe / Screen Digest / IAB US

SEARCH DRIVES GROWTH DURING RECESSION

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

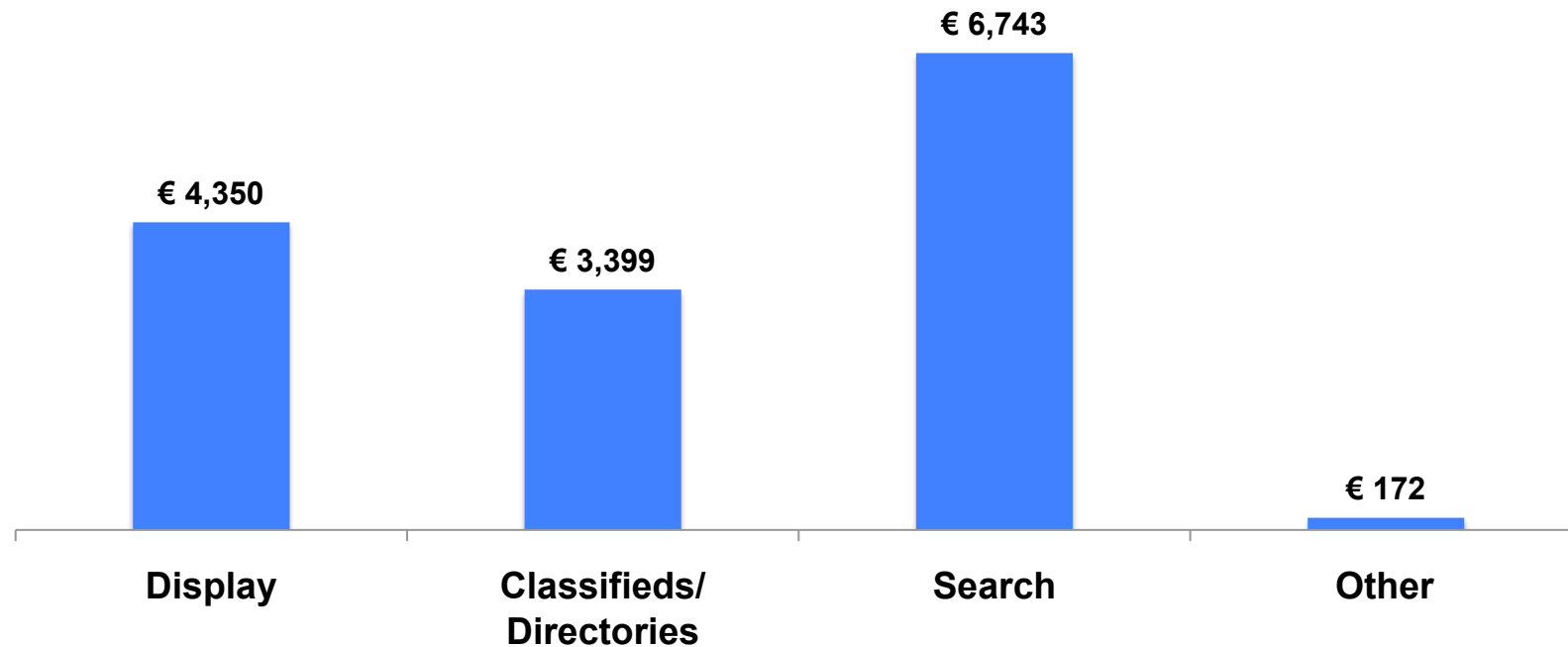


Note: Like-for-like growth is calculated excluding the new submissions (Bulgaria, Slovakia, Switzerland and Russia) for which no data was available in 2008.

Source: IAB Europe / Screen Digest

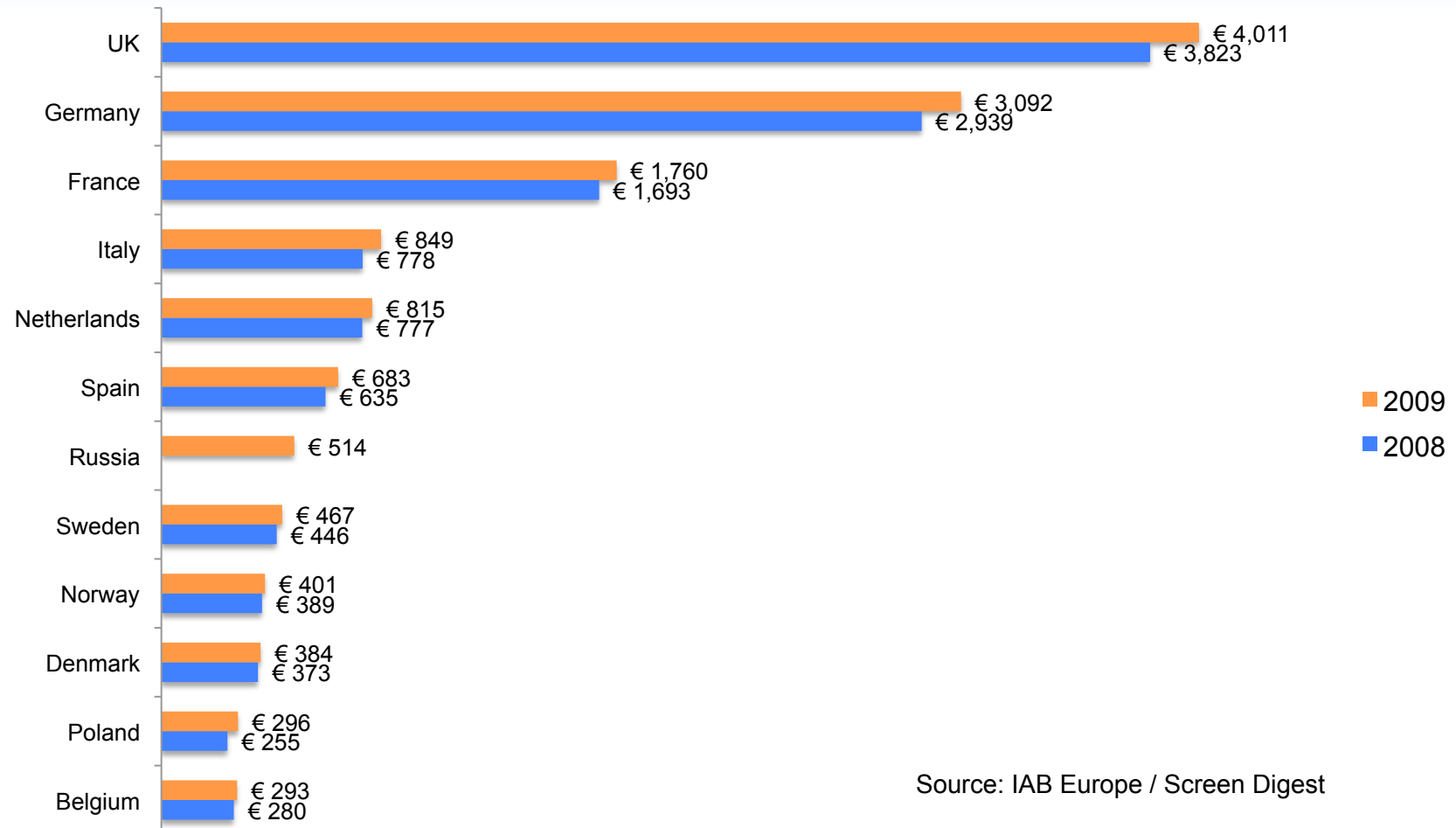
EUROPEAN ONLINE ADSPEND BY FORMAT

Online adspend in € millions



MARKET TOTALS 2008 & 2009 (TOP 12)

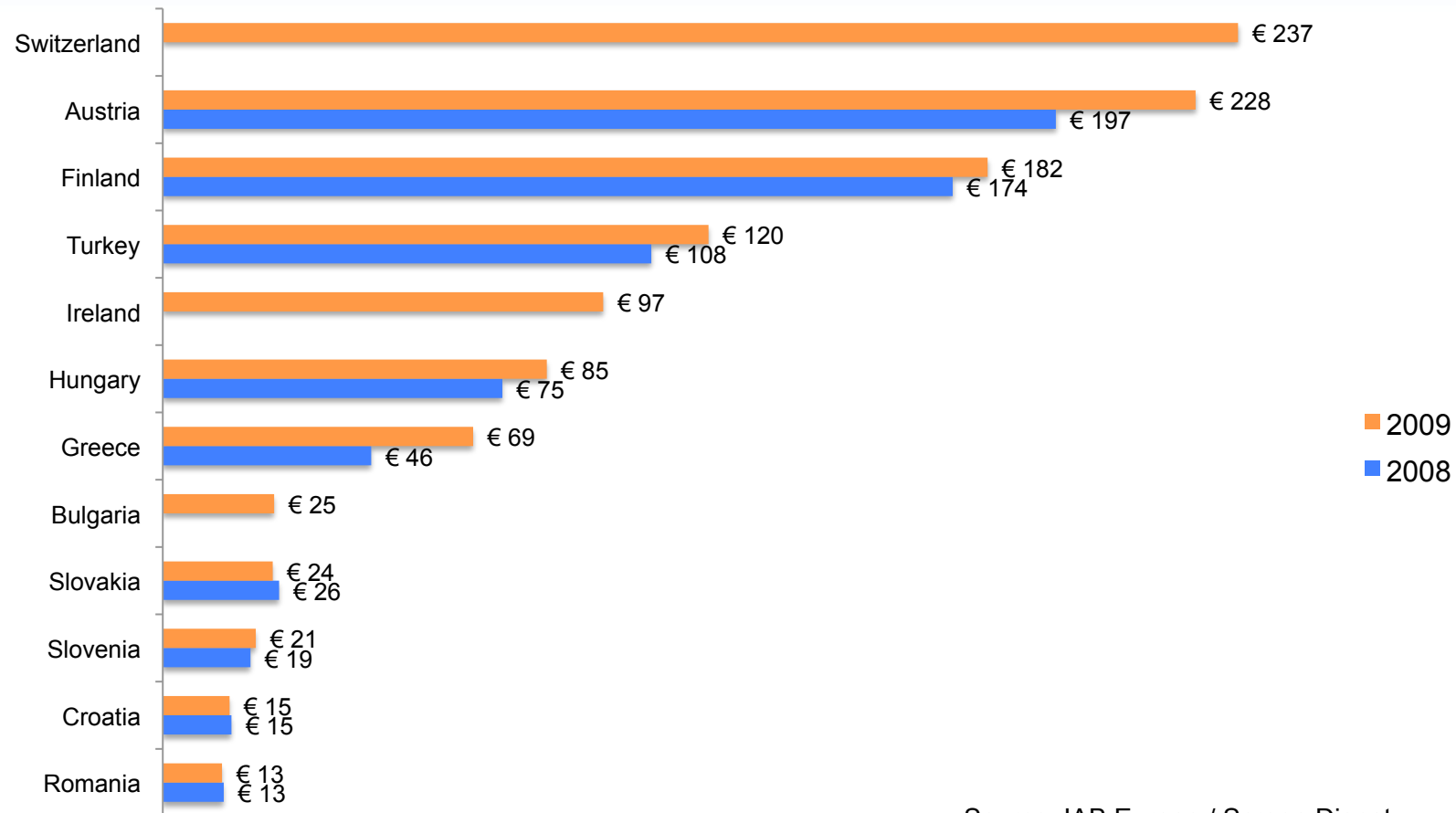
The top 6 countries make up 76% of the total spend
Online ad spend by country 2009 (& 2008 where available) €m



Source: IAB Europe / Screen Digest

MARKET TOTALS 2008 & 2009 (NEXT 12)

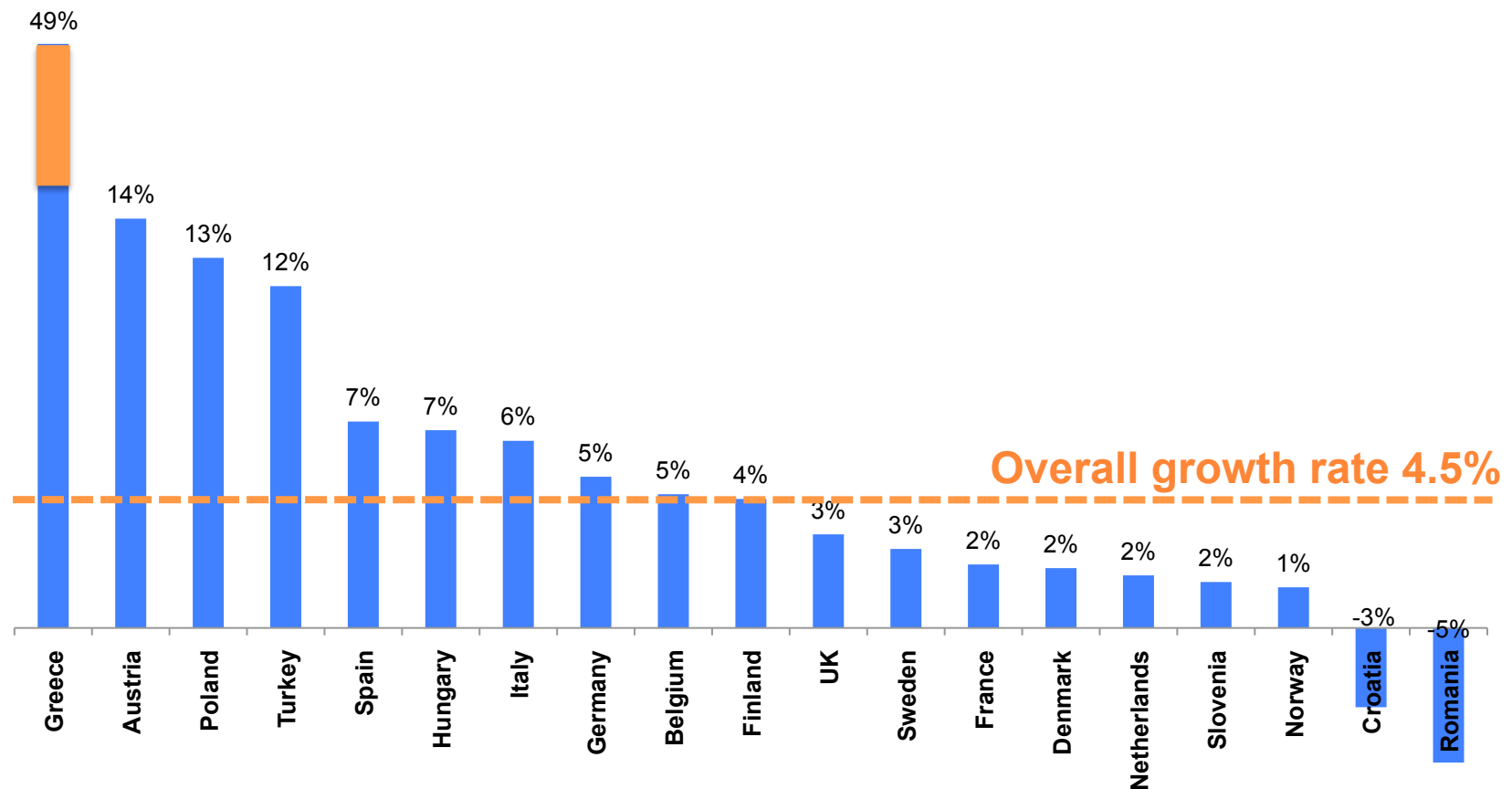
Online ad spend by country 2009 (& 2008 where available) €m



Source: IAB Europe / Screen Digest

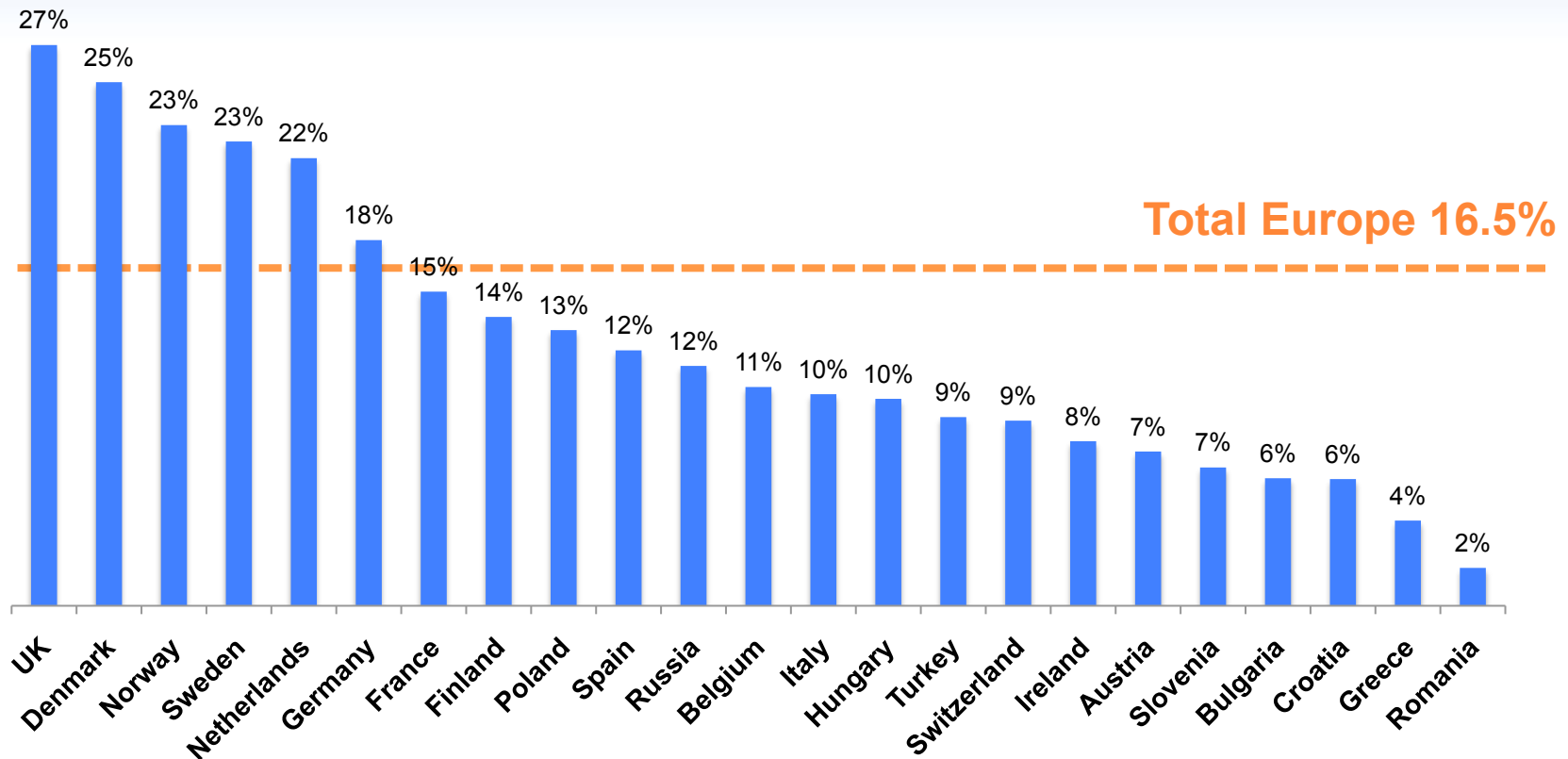
LIKE FOR LIKE GROWTH 2008-2009

No clear regional trends: Both established and emerging markets at each end of the spectrum



SPEND ONLINE AS A PERCENTAGE OF MAIN MEDIA SPEND (WARC DATA)

Online spend as % of main media



WARC's main media figures include spend on TV, newspapers, magazines, radio, cinema and outdoor advertising

CONTACTS & MORE INFO

- Please refer to the full IAB Europe AdEx report for more information about European online advertising spend including
 - Detailed analysis of spend formats
 - Country breakdowns by format
 - Spend forecasts from Screen Digest
- For information on AdEx, including how to obtain the full report as well as other European research products please see the research pages at www.IABEurope.eu