



Online Advertising

The Global Online Advertising Market 2009-2012

Market & Data Reports

This report provides a thorough analysis of the online advertising market that is currently changing shape – exploring the techniques being used and the main approaches being taken to advertising on the Web, along with an examination of the positioning of the top players, the central issues facing the sector and market forecasts up to 2012 by country and by ad format.

Key questions

- What is the size of the online advertising market, worldwide and nationally?
 - At what rate will the market progress between 2009 and 2012 at a time of global crisis in the advertising sector?
 - What weight does search marketing really have?
 - What market share will display ads have as rich media and video advertising develop?
 - What are the most widely anticipated technologies and developments: behavioural targeting, video advertising, audience measurement?
 - How is the sector's new value chain being organised between advertisers, agencies, online ad services, keyword sales and Websites?
- > Database included (Excel): World, Europe, France, Germany, Italy, Spain, the UK, the United States, China, South Korea, Japan



1. Executive Summary

2. Methodology

3. Market Structure

3.1. Market overview

3.1.1. Definition

- Above the line and below the line marketing
- Internet: a medium serving non-media advertising
- Pricing models
- Spending on advertising (gross, net)

3.1.2. Market segmentation

- Goals of advertising campaigns
- One format per buying cycle
- Display and sponsoring
- Search marketing
- Classified ads
- Online directories

3.2. Market estimates 2005-2008

3.2.1. Market by advertising format

- Display
- Search Marketing

3.2.2. Market by geographical zone

- EU-27 and EU-5
Germany, France, Spain, Italy, the UK
- The United States
- China, South Korea, Japan

3.3. Key factors

3.3.1. Key technologies

- Improving relevance
- Targeting: segmentation and qualification
- Contextualisation
- Tracking and behavioural targeting
- Behavioural targeting
- Right to privacy and regulated limits
- Rise of video advertising
- Audience measurement
- Efficiency of the advertising-content mix

3.3.2. Consumption patterns driving the growth of online advertising

3.3.3. Service industry trends

- Advertising innovations
- Video and new ad formats
- Marketing 2.0
- Display: new generation banners
- Developments in audience measurement

4. Structure & Strategy

4.1. Player profiles

4.1.1. Value chain

- Search marketing
- Display

4.1.2. Competition structure

- Large number of advertisers
- Online ad services: a splintered market
- Online advertising end market: an oligopoly

4.1.3. Business models

- Widely varying ad creation costs
- Revenue and costs for a typical online company
- Sharing ad revenue
- E-marketing and e-commerce

4.2. Player profiles

4.2.1. Summary table

- Display sites
 - Online advertising services
 - Agencies
 - Affiliation platforms
- ##### 4.2.2. Player profiles

4.3. Strategic analysis

4.3.1. Evolution of the main formats

- End of the golden age for search marketing?
- The rise of a two-tier display market?

4.3.2. Local advertising: a boon for online marketing

4.3.3. Ad creation: going beyond the Flash vs. link dilemma

4.3.4. How the Web is adjusting to the crisis

- Shrunken advertising market overall
- Online advertising market continues to grow
- Increasing demand for performance-based formats
- Increased pressure on prices

5. Markets & Forecasts

5.1. Growth factors

5.1.1. Analysis of growth/disruptive factors

5.1.2. Forecast hypotheses

5.2. Market forecasts

5.2.1. Forecasts 2009-2012

5.2.2. Forecasts by segment, by platform

5.2.3. Forecasts by geographical zone

Database (Excel)

- Forecasts by country and by segment

130 Pages
Print: 2,900 Eur
PDF: 3,500 Eur
April 2009

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Database (Excel)

Zone & Countries covered

Data analysed (2005-2008) & (2009-2012)

<ul style="list-style-type: none"> Worldwide EU-27 EU-5 	<ul style="list-style-type: none"> China France Germany Italy Japan South Korea Spain United Kingdom United States 	<ul style="list-style-type: none"> Online ad revenue (million EUR) Total media ad revenue (million EUR) Total marketing revenue (million EUR)* Share of media ad revenue (%) Share of total marketing revenue (%) Online ad revenue % growth (%) Media ad revenue % growth (%) Marketing revenue % growth (%) Internet users (million) 	<ul style="list-style-type: none"> Online ad revenue by advertising format Display (million EUR) Search marketing & assimilated (million EUR) Other (million EUR) Total (million EUR)
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Players included in the report

Supporting sites

Online ad solutions

Agencies

Affiliation platforms

<ul style="list-style-type: none"> Google Yahoo! Microsoft/MSN AOL Ask Facebook MySpace YouTube Hulu CNN New York Times The Weather Channel Craigslist Bebo BBC The Guardian Virgin Media Au Féminin Pages Jaunes Dailymotion Skyrock Doctissimo 	<ul style="list-style-type: none"> L'Equipe Deezer Orange Web.de GMX T-Online Spiegel Online El Mundo Marca Terra Libero Corriere della Serra Gazzetta Baidu QQ Sohu Sina Naver Cyworld Daum Livedoor FC2 Mixi 	<ul style="list-style-type: none"> Adtech (Platform-A) DoubleClick 24/7 Real Media ValueClick Right Media aQuantive InterCLICK FOX Networks Adtiva Hi-Media Horyzon Media Adverline Orange Advertising Network AdLink Ad2Net Coguan Premium Publisher Network Allyes Digital Advertising Consortium 	<ul style="list-style-type: none"> Havas Digital TBWA Worldwide Rapp Agency.com Razorfish Digitas Performics Efficient Frontier iCrossing Omniture Sapient Carat Isobar FullSix XiTi Wunderloop Scholz & Friends Plan.net Allyes Cheil Worldwide Portfolio Dentsu Hakuhodo Asatsu-DK 	<ul style="list-style-type: none"> Commission Junction LinkShare Hydra Network Advaliant Clickbooth TradeDoubler Webgains Affiliate Advantage Effiliation Netaffiliation Zanox Affilinet ChineseAN LinkPrice ValueCommerce
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