

Research Showcase at **IAB Europe** November 2008

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« Your voice for the European digital industry »

IAB Europe supported by



Update about the network in Europe

Providing Digital Embassies for the
Industry

by

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November 2008 : our network of digital embassies

Established countries :

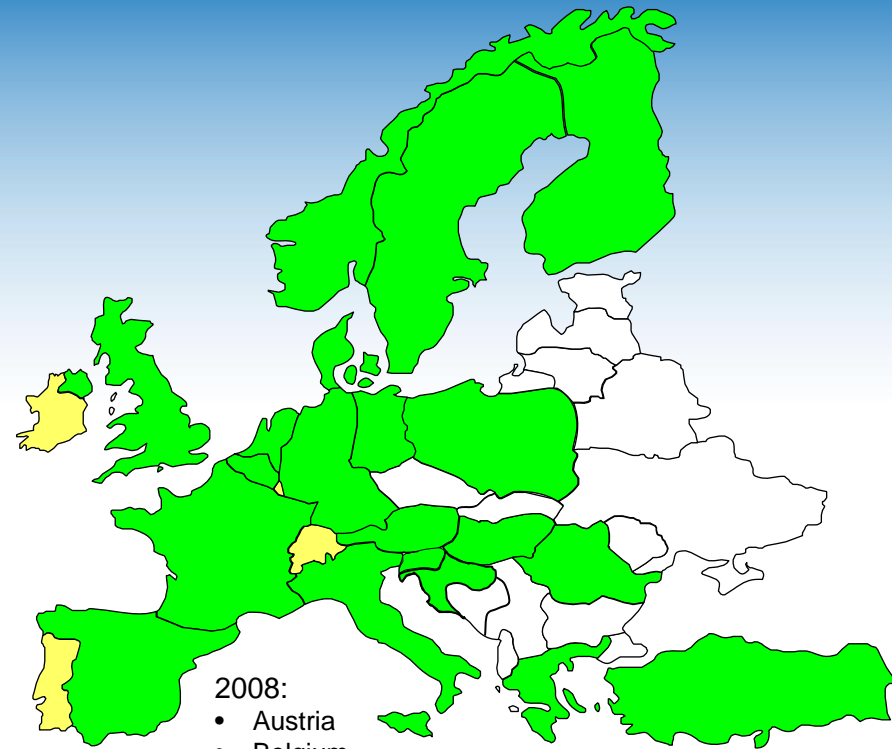
- 19 countries with over 95 staff
- more than 5000 member companies

New countries in 2009 :

- 4 countries closing W-Europe
- And Russia, Bulgaria, Bosnia...in 2010

Priorities at IAB Europe for 2009-2010 :

- Public Affairs
 - ePrivacy, BT and Social Media
- Standardisation
 - Display, Video, Mobile, etc
- Benchmarking
 - AdEx Europe, Mia, etc
- Best Practices
- Press awareness



2008:

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

2009:

- Switzerland
- Portugal
- Ireland
- Luxemburg
- ...
- Russia
- ...

Market Insights from the Digital Industry

Consulting from time to time our 23
National IABs and 12 Corporate members
about some specific issues : the Captains of
our Digital Industry

Question 1 :

Main evolutions in the market in 2008?

Summary :

- Internet will still grow up to ave. 23% online media in 2008 compared to 2007 :
 - This could mean AdEx Europe : 14,1 Billions €
- Shifting Branding budgets to online :
 - Video
 - Emotional formats, homepage or day events
- Measurability means :
 - Performance based marketing
 - Targeting and profiling
- Education :
 - Lack of expertise

Question 2 :

Trends in Q3 and Q4?

Summary :

- Recession and Economical slowdown :
 - Cut marketing spendings but online continues to grow at 10% average
 - Postponing decisions
 - Performance based marketing
 - Flexibility and fast reactivity
- Global market :
 - Traditional media loosing some 5-10%
 - Digital gaining market share

Question 3 :

Challenges for 2009?

Summary :

- Prove ROI and explain measurability
- More transparency
- Professionalism
- Privacy
- Ideal Media Mix
- Creativity
- Proving effectiveness in :
 - Branding and Emotions
 - Brand activation
- Resources

Question 4 :

Opportunities for 2009?

Summary :

- Move digital to central role within integrated campaigns showing the power of social engagement
- Display and Search...better together
- Demonstrate the strength of bundled approaches between one traditional media and one digital tool : « internet and tv, better together or internet and radio, better together »
- Innovation and Creativity

Question 5 :

How can Digital resist the crisis?

Summary :

- Lead generation
- ROI
- Survival of the fittest
- Direct Response
- Effectiveness and Engagement
- Targeting within the masses

Question 6 :

How can advertisers benefit from interactive campaigns?

Summary :

- Testing
- Conversion
- Diversification
- Dialogue
- Customer Relationship Management
- Funnel for the buying process
- Enrich off-line campaigns
- Convergence