

Alain Heureux – Presidente IAB Europe
IAB Italia Forum 2008 - Milan
« New media lo scenario europeo »

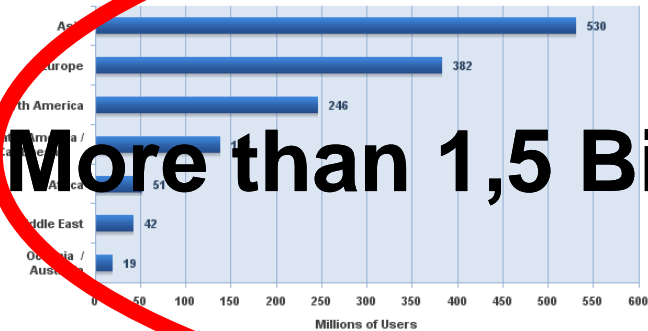


VISION

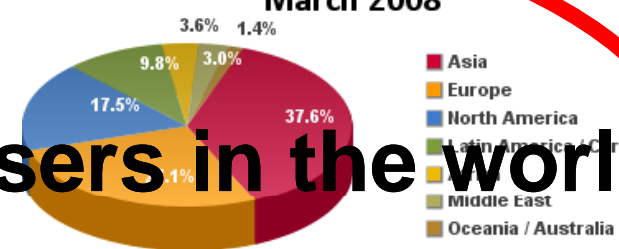
THE WORLD OF MARKETING IS CHANGING



Internet Users in the World
March 2008



World Internet Users
March 2008



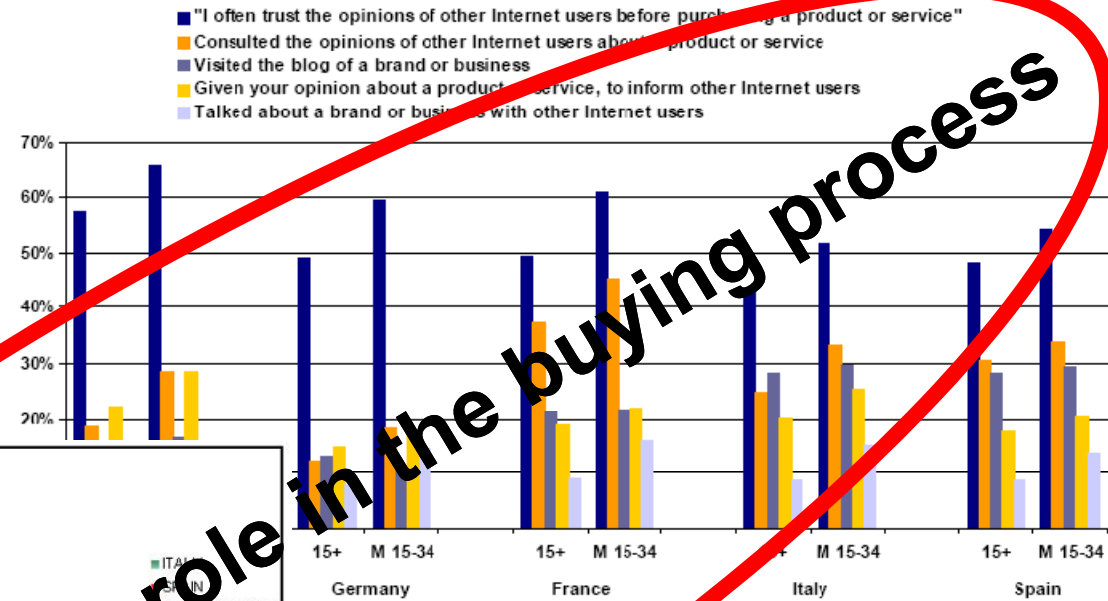
More than 1,5 Billion regular users in the world

Source: www.internetworldstats.com/stats.htm
Copyright © 2008, Miniwatts Marketing Group

Note: World Internet Users estimated at 1,407,724,920 for Q1 2008
Copyright © 2008, Miniwatts Marketing Group www.internetworldstats.com

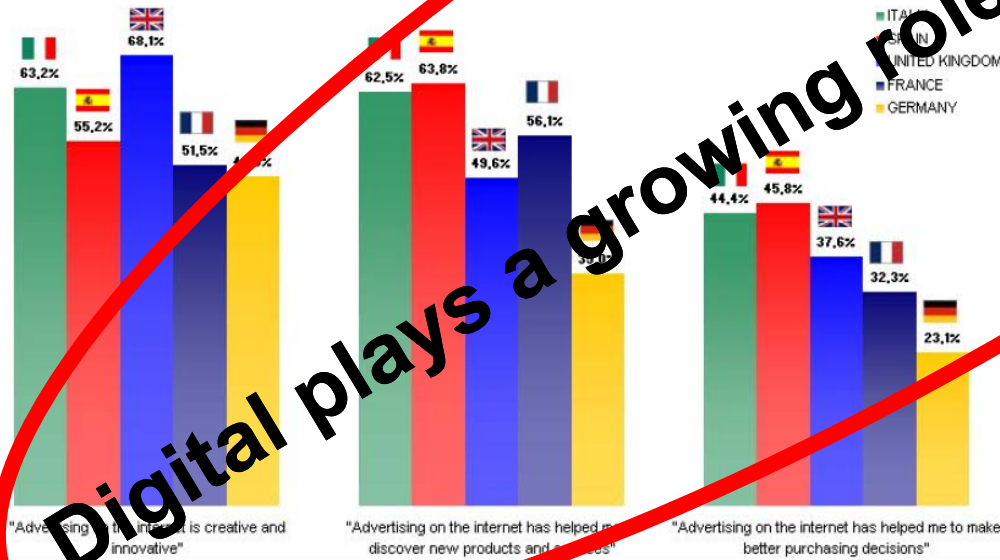
Influence of the Internet on the reputation of brands, products and services online

(Source : Harris Interactive - NetObserver® Europe, June 2007)



PERCEPTION OF ONLINE ADVERTISING BY EUROPEAN INTERNET USERS

(Source: Novatris - NetObserver® Europe, June 2006)



June 2006

Europe's eCommerce Forecast: 2006 To 2011

Net Retail Will Soar From €103 Billion To €263 Billion

by Jaap Favler
with Michèle Bouquet

EXECUTIVE SUMMARY

In the coming five years, the number of Europeans shopping online will grow from 100 million to 174 million. Their average yearly Net retail spending will grow from around €1,000 to €1,500, as UK Net consumers outspend even their US counterparts online. Overall, this will cause European eCommerce to surge to €263 billion in 2011, with travel, clothes, groceries, and consumer electronics all above the €10 billion per year mark.

Digital plays a growing role in the buying process

Consumer in control

- More marketing literate
- Desire for more autonomy and uniqueness
- Less trusting
- More critical, skeptical
- Even indifferent



A young couple is shown in profile, facing each other and about to kiss. The woman is on the left, and the man is on the right. They are both wearing blue jackets. The background is a soft, out-of-focus sky. A semi-transparent dark blue box with a grid pattern is overlaid on the bottom right of the image, containing white text.

Personalisation is a key
benefit of digital media

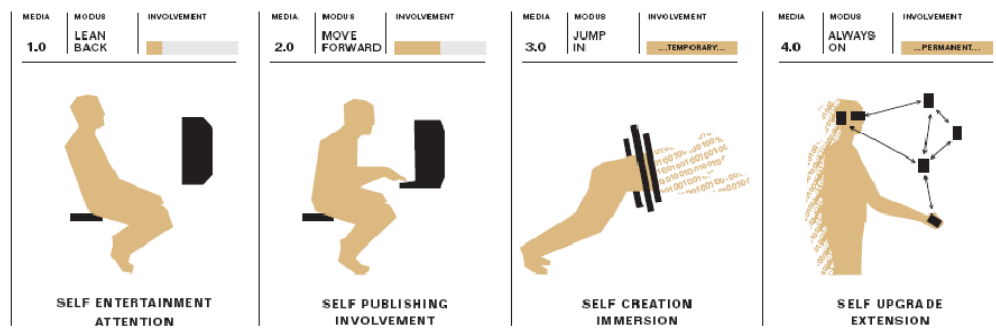


ANCIENT SOCIETY	HUNTING SOCIETY	CIVILIZED SOCIETY	INDUSTRIAL SOCIETY	INFORMATION SOCIETY	KNOWLEDGE SOCIETY	VIRTUAL SOCIETY	AUGMENTED SOCIETY
PRIMITIVE SOUNDS AND LANGUAGE	WRITING STONEBOARD	PAPER LETTERPRESS	NEWSPAPER ADVERTISING PILLAR PHOTOGRAPHY TELEPHONY	PRINT RADIO TV INTERNET EMAIL	WEB 2.0 PODCAST WEBLOG WIKI SOCIAL COMMERCE MOBILE COMMUNITY	MEDIA 3.0 / JUMP IN 3D IMMERSION CONSOLES GAMING VIRTUAL WORLDS VIRTUAL REALITY SEMANTIC WEB SMART SEARCH	ALWAYS-ON ENDURING COMMUNITY CONNECTED SPACE DIGITAL AURA AGENTS EXTENSIONS IMPLANTS WEB OF THINGS MOBILE INTELLIGENCE



© TRENDONE NILE MÜLLER COMMUNICATIONS / IDEE: NILE MÜLLER / KONZEPT: TORSTEN REIDER / REALISIERUNG: FORAMIT DESIGN

trendone MEDIA EVOLUTION





MISSION

IS STILL THE SAME BUT THE TOOLS HAVE
CHANGED

Consumer dialogue lifecycle >>>>

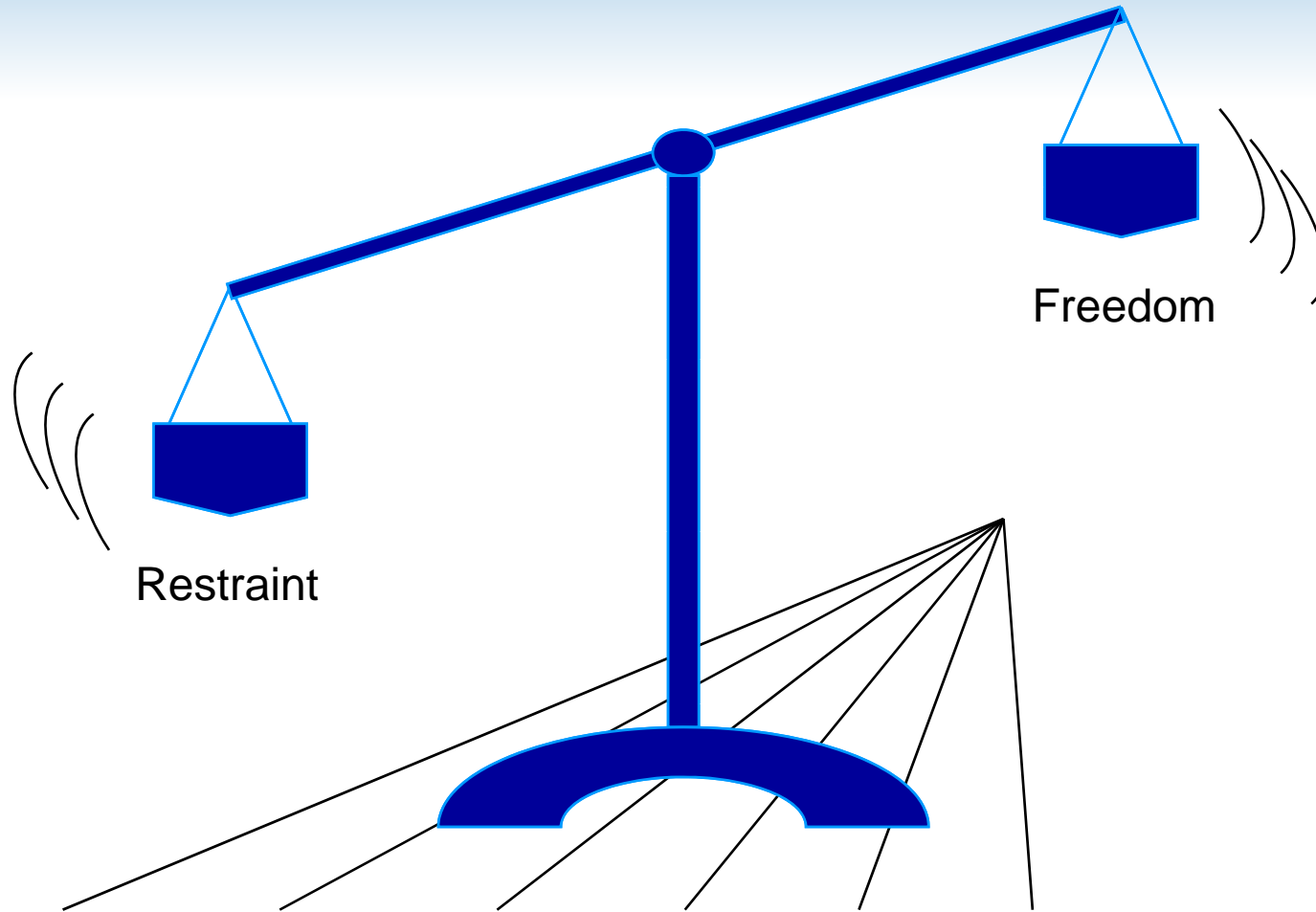




THREAT

THE REGULATOR IS WORRIED

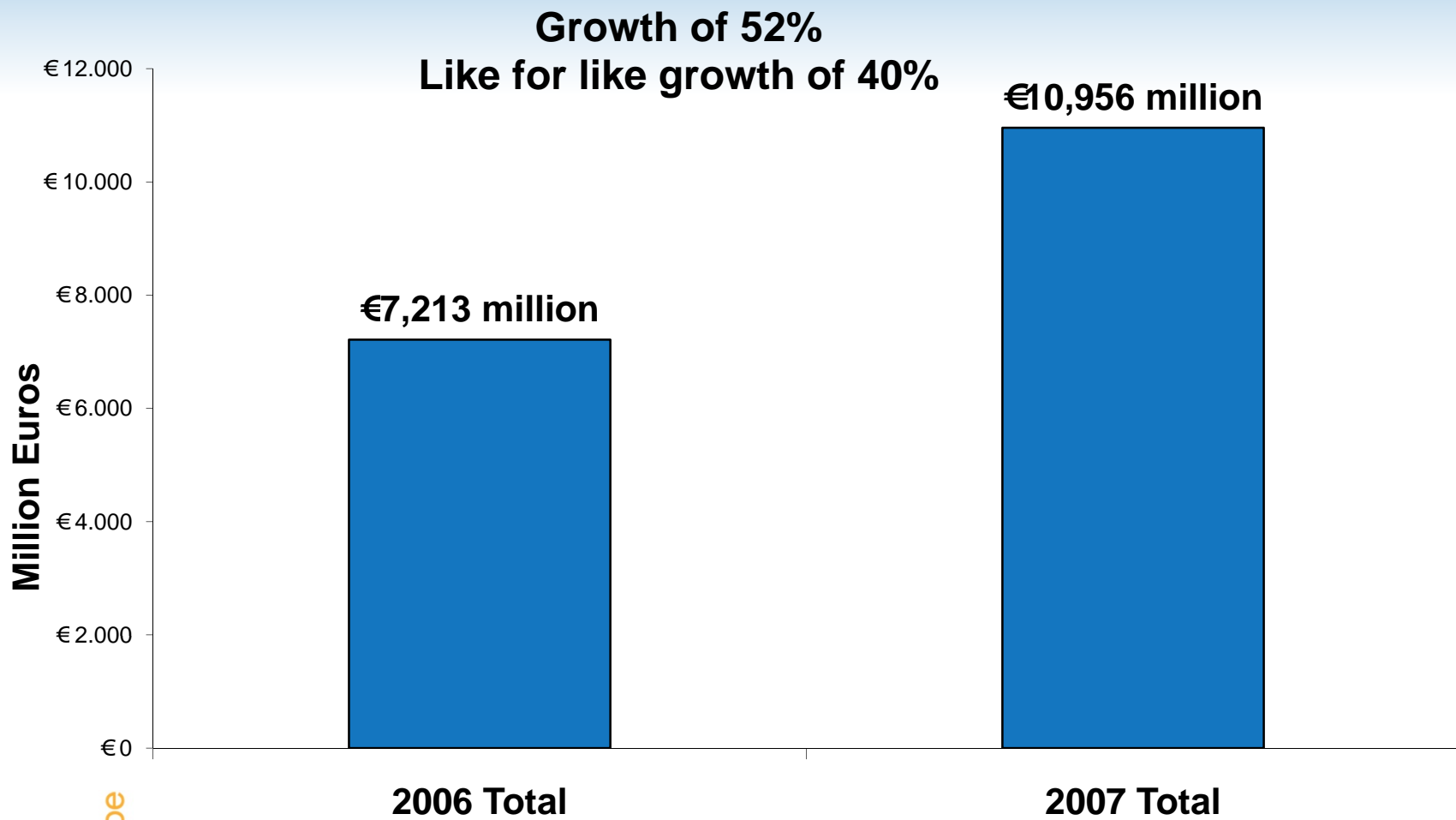
Balancing act

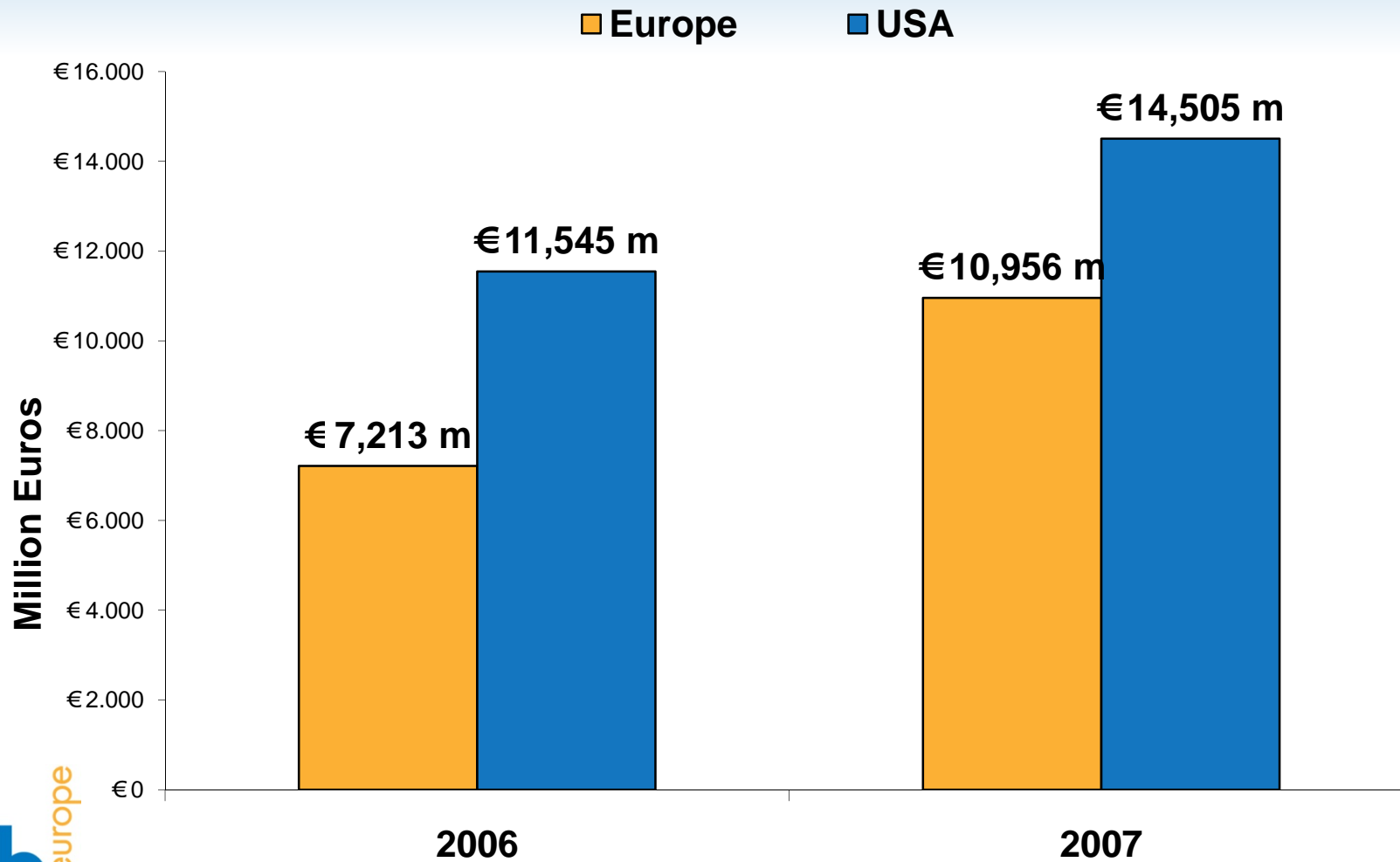


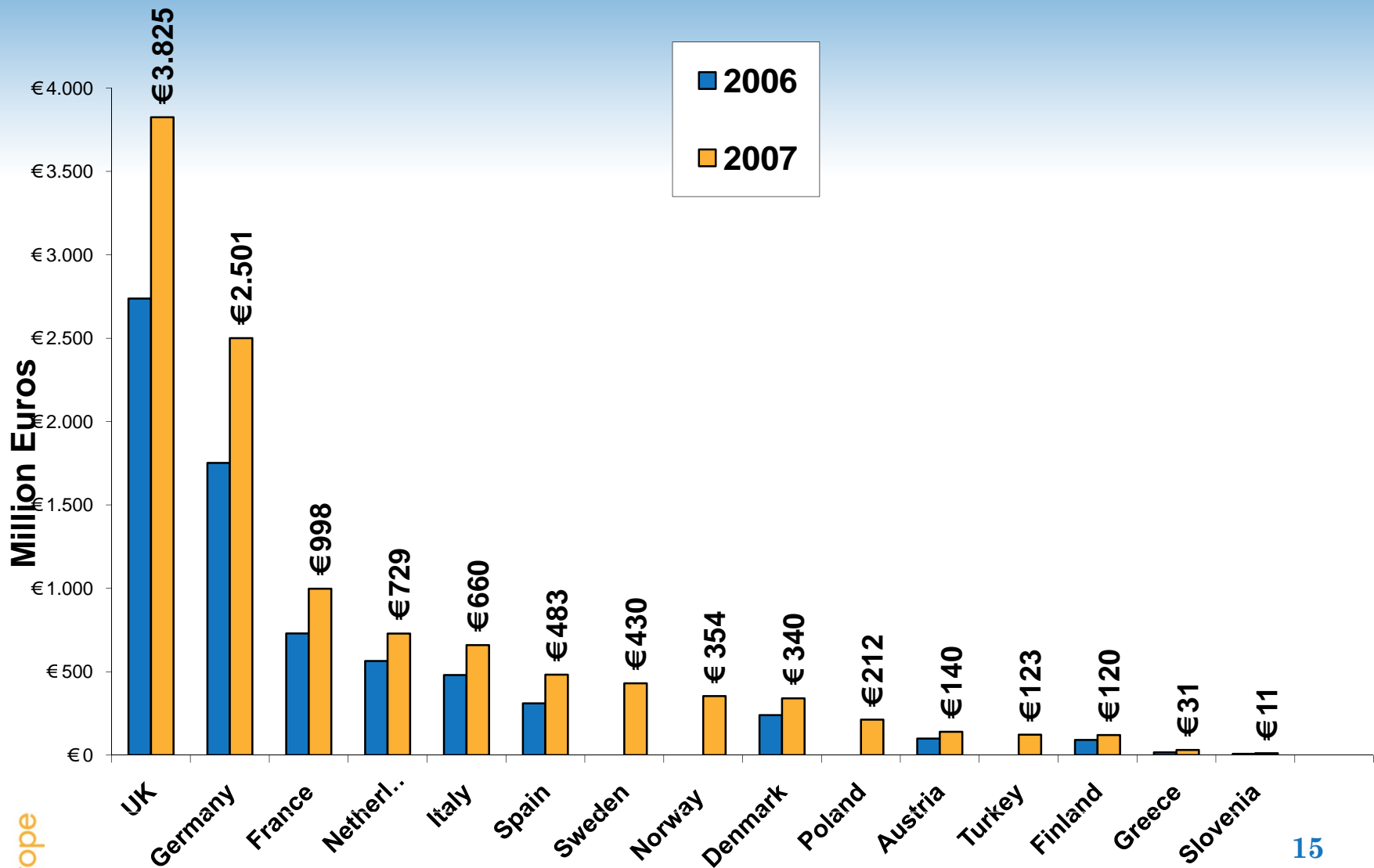


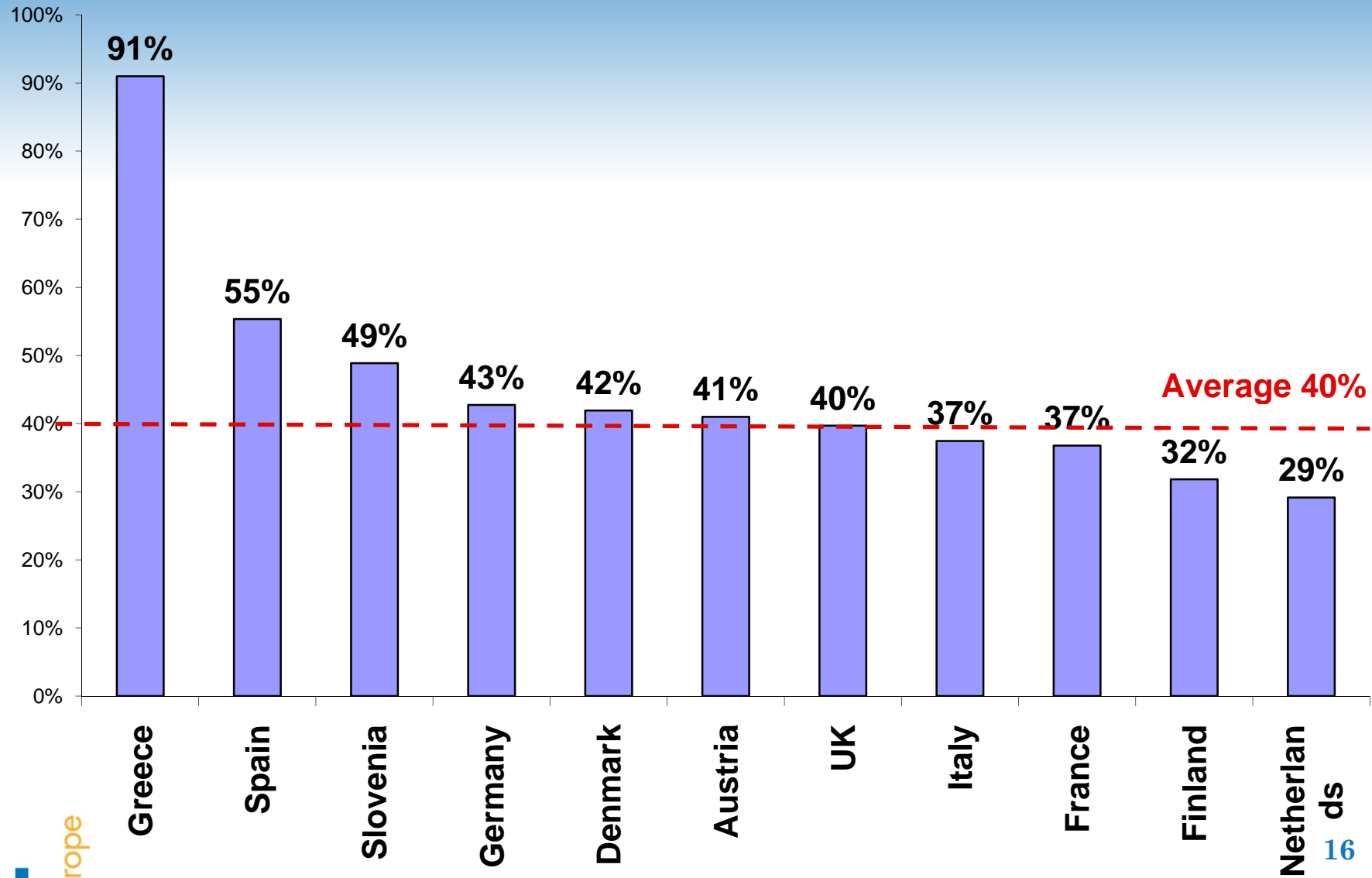
SITUATION

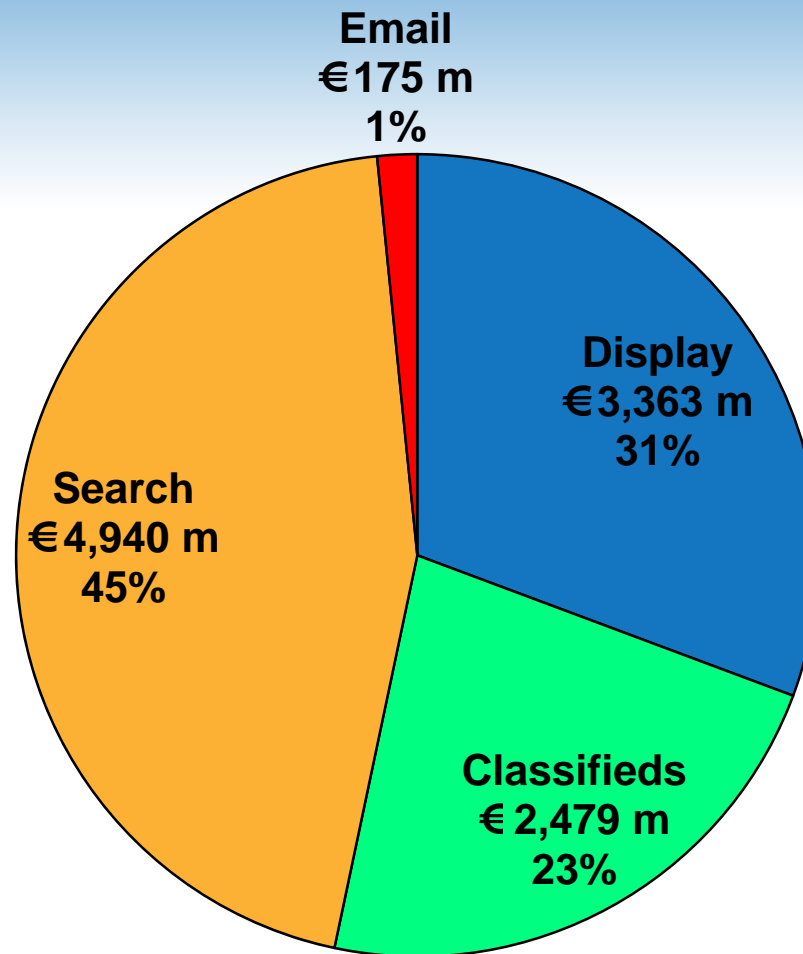
HOW BIG IS THE EUROPEAN MARKET

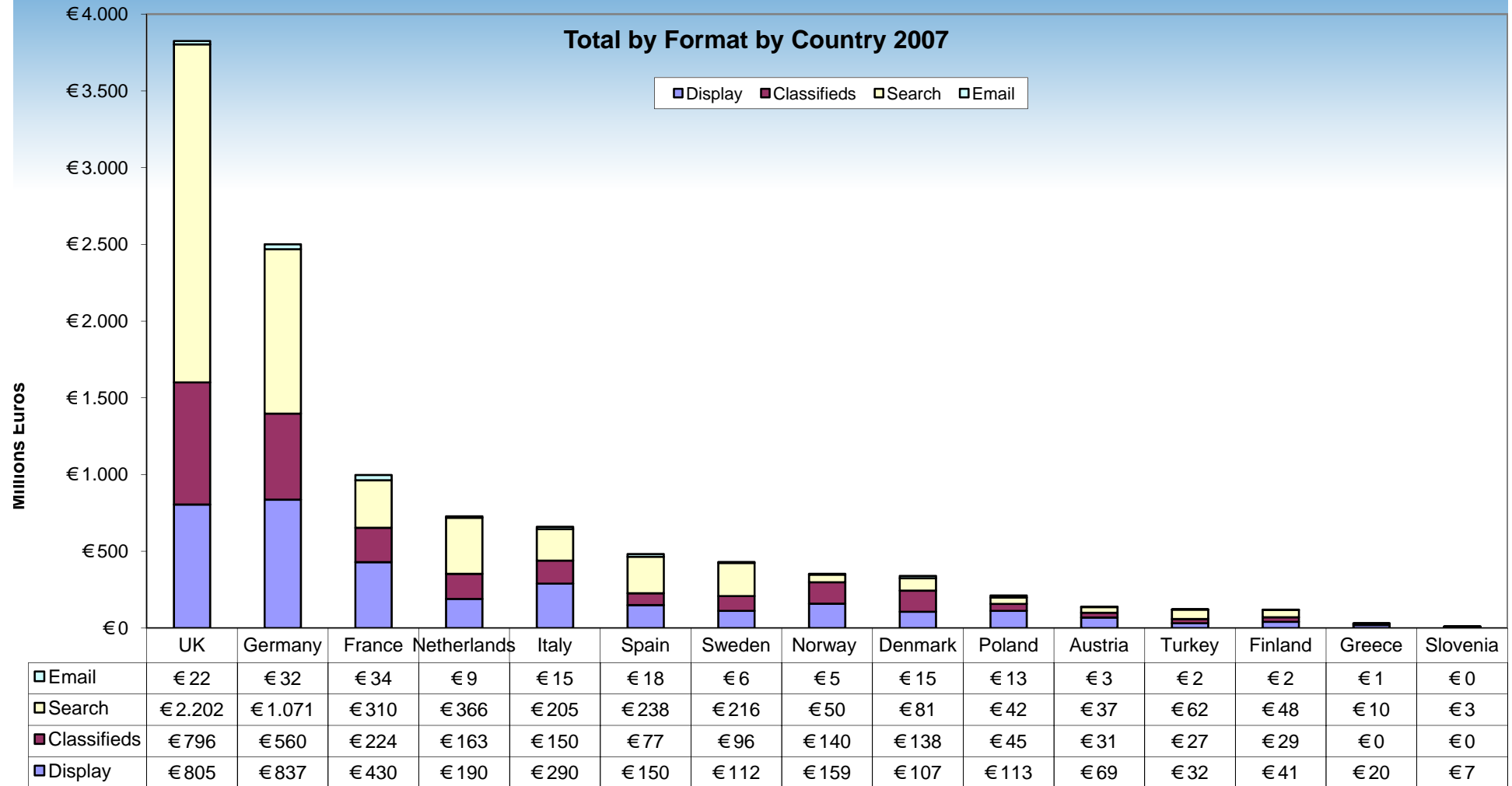




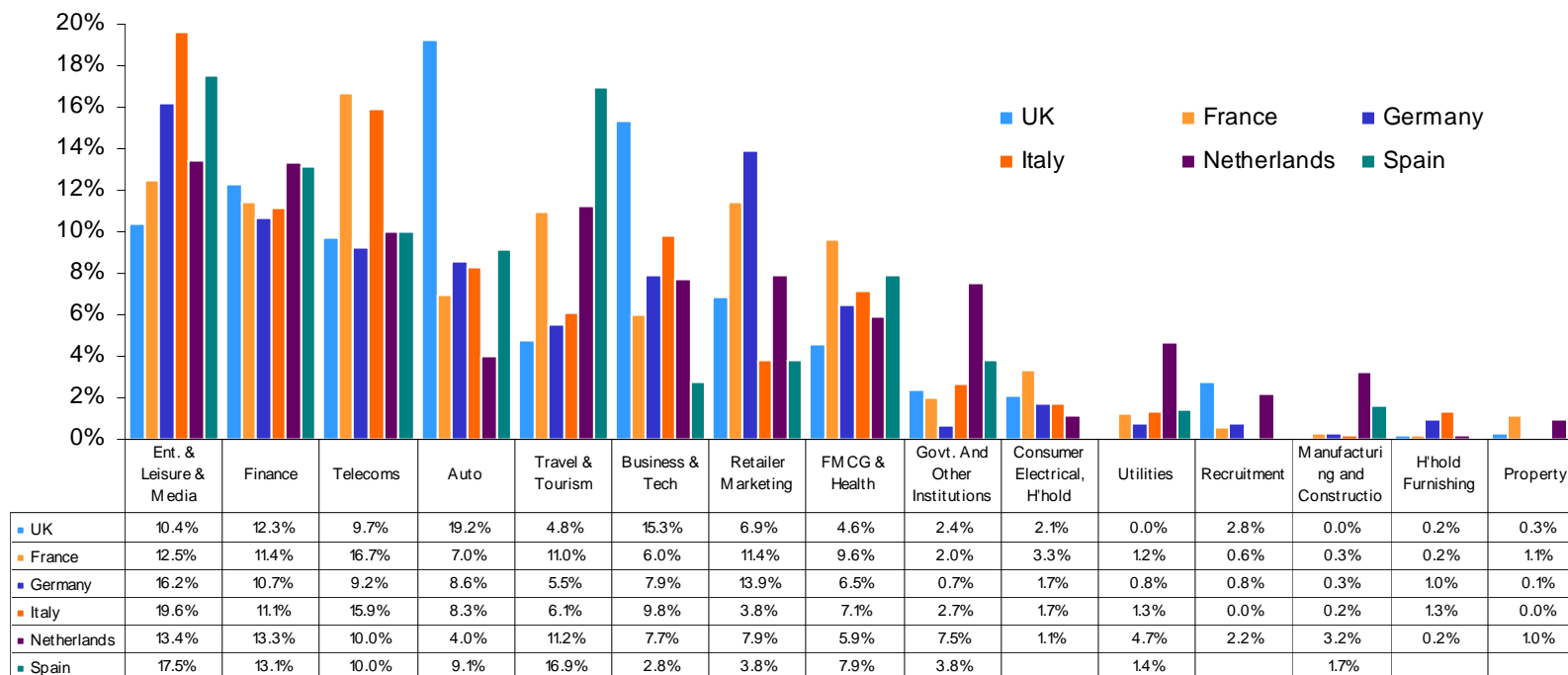








Industry category breakdowns for display spend in top 6 countries



Source: IAB Europe/PwC ©



IAB EUROPE

HOW CAN WE HELP...

November 2008 :

Established countries :

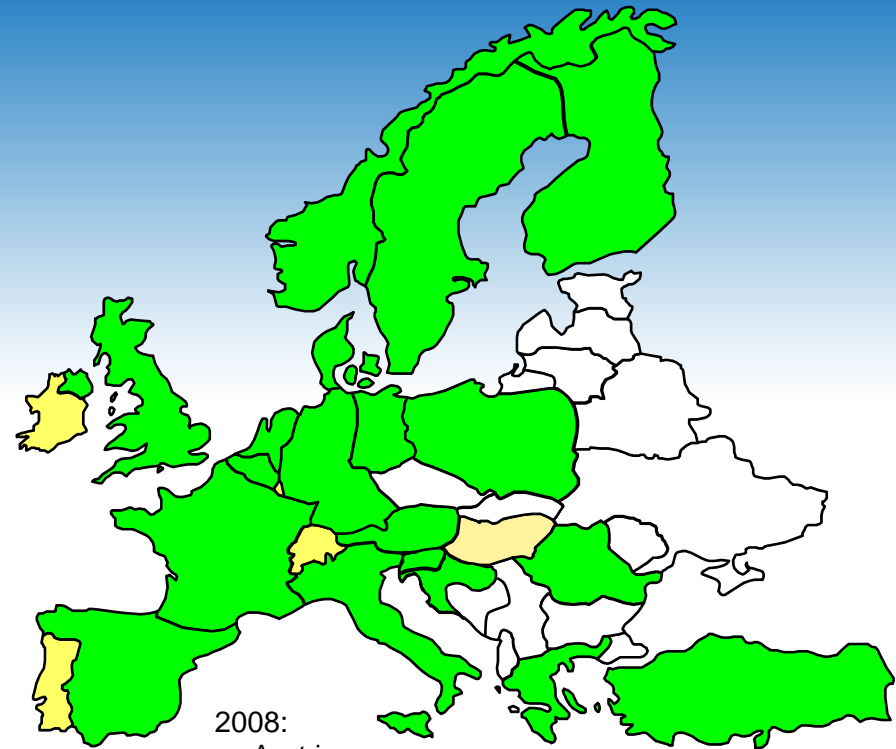
- 18 countries with over 90 staff
- more than 5000 member companies

New countries in 2009 :

- 5 countries closing W-Europe
- Russia

Priorities 2009-2010 :

- Public Affairs
- Standardisation
- Benchmarking
- Best Practices
- Press awareness



2008:

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

2009:

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

Thank you



president@iabeurope.eu and www.iabeurope.eu