



Personal Data & Advertising

State of Online Advertising Worldwide

Search • Display • Mobile • RTB Social networking • Video

M14155SRA - July 2014

- ••• This document is a part of our "Personal Data & Ad" category which includes in 2014:
 - 1 dataset in Excel, updated yearly
 - 1 state-of-the-art report in PowerPoint, updated yearly
 - 3 market reports in Word, each with its synopsis in PowerPoint
 - Privileged access to our lead Internet Technologies analysts



Author: Soichi NAKAJIMA, Senior Consultant



Soichi joined IDATE as a senior consultant in January 2009.

His main area of endeavour is the Internet services market, both fixed and mobile, covering a wide range of topics such as VoIP, social networks, net neutrality, advertising and the use of personal data, to name but few. In particular, he specialises in the 'Telco and OTT' perspective, including the analysis of strategies employed by the various players, scenario building and forecasts.

Before coming to IDATE, Soichi worked for NTT DoCoMo, Japan's largest mobile network operator by subscriber numbers, where he played a leading role in the strategic planning of the rollout of Japan's first 3G M2M data-only tariffs.

Soichi holds a Bachelors degree in mathematics, from the University of Nottingham in the UK.

s.nakajima@idate.org

Contributor

Vincent BONNEAU, Director of Internet Business Unit

About IDATE and DigiWorld Institute



Founded in 1977, IDATE has gained a reputation as a leader in tracking telecom, Internet and media markets, thanks to the skills of its teams of specialized analysts. Now, with the support of more than 40 member companies – which include many of the digital economy's most influential players – the newly rebranded DigiWorld Institute has entered into a new stage of its development, structured around three main areas of activity:

- IDATE Research, an offer of market intelligence publications
- · IDATE Consulting, time-tested analysis
- DigiWorld Institute, a think tank on the digital economy

IDATE Research DIGIWORLD **Programme** www.idate.org **Future Networks Media Strategies Digital Living** Telecom Strategies Telecom Wireline Connected Economy Television & Over-The-Top Players & Markets Video Distribution & Personal Data & Ad Wireless Telecom & Over-The-Top Consumer Electronics Spectrum Digital Entertainment Satellite Cloud & Infrastructure

Contact us for further information on our publications Isabel Jimenez
P: +33 (0)467 144 404 - F: +33 (0)467 144 400

i.jimenez@idate.org

Copyright IDATE 2014, CS 94167, 34092 Montpellier Cedex 5, France - All rights reserved. None of the contents of this publication may be reproduced, stored in a retrieval system or transmitted in any form, including electronically, without the prior written permission of IDATE. *IDATE, DigiWorld, DigiWorld Institute and DigiWorld Yearbook are the international registered trademarks of IDATE.*

State of online advertising worldwide

Contents of the report

1. The advertising market in figures	5
1.1. Value of the global online advertising market	6
1.2. Value of global online advertising market: regional / country	
breakdown	7
1.3. Value of global online advertising market: breakdown by format	8
1.4. [Mobile] Value of global online advertising market	9
1.5. [Mobile] Value of global online advertising market: regional / country breakdown	10
[Social] Value of global online advertising market	11
1.7. [OTT video] Value of global OTT video advertising market	12
1.8. Value of global RTB advertising market	_13
2. The online advertising ecosystem	_14
2.1. The overall advertising ecosystem	15
2.2. Overview of player shares in advertising market – worldwide	16
2.3. Focus on mobile advertising: breakdown by format and main	17
players	
2.4. Google	19
2.5. Facebook_	20
2.6. Yahoo!	21
2.7. Microsoft	22
2.8. Focus: search advertising partnerships between the giants	23
2.9. Twitter	24
2.10. Amazon and Apple	25
2.11. Player positioning in terms of open/closed and mobile focus	26
2.12. Wrap-up on the giants: Different approaches by the various players	27
•	

Main trends in online advertising and personal data use	_28
3.1. The major trends overview	29
3.2. Technology trend: RTB	30
3.3. Technology trend: Re-targeting	3
3.4. RTB and re-targeting example: FBX (Facebook Exchange)	3
3.5. Business model trend: native ads	3
3.6. Business model trend: new data monetisation and exploitation strategies	_34
3.7. Business model trend: new data exploitation models by telcos _	3
3.8. Business model trend: examples of other players with data exploit	a to 30
3.9. Privacy trends: cookies	3
3.10. Privacy trends: The tussle over cookies and alternatives	_38
3.11. Privacy trends: VRM	_39
3.12. Privacy trends: Privacy paradox and usage	4



State of online advertising worldwide

Tables & Figures

1. The advertising market in figures	5
 Global online advertising revenues and their share of total media advertising revenues, 2010-2018 	6
Global online advertising annual ARPU, 2010-2018	_6
Global online advertising revenues, by region, 2010-2018	7
Global online advertising revenues of select APAC countries, 2010-20	018 7
 Breakdown of global online advertising revenues, in terms of advertising formats (display, search, other), 2010-2018 	ing 8
 Share of search engine markets, global and in select countries, based on searches conducted, 2013 	b 88
 Global mobile advertising revenues and their share of total online advertising revenues, 2010-2018 	9
Global online advertising annual ARPU, 2010-2018	9
Global mobile advertising revenues, by region, 2010-2018	10
 Global mobile advertising revenues of select APAC countries, 2010- 2018 	_10
 Global social networking advertising revenues and their share of total online advertising revenues, 2010-2018 	_11
Global OTT video advertising revenues and their share of total online	
advertising revenues, 2010-2018	_12
 Global OTT video advertising revenues by region, 2010-2018 Global RTB advertising revenues and their share of display advertisin revenues, 2010-2018 	_12 ig _13
Global RTB advertising revenues by region, 2010-2018	13
2. The online advertising ecosystem	_14
The online display advertising ecosystem	15

Player shares of online advertising revenue in 2013	16
Player shares of mobile advertising revenue in 2013	16
 Current market breakdown between search and display advertising; comparing fixed and mobile 	_18
Evolution of Google advertising revenues, 2009-2013	19
Evolution of Facebook advertising revenues, 2009-2013	20
Evolution of Yahoo! advertising revenues, 2009-2013	21
 Division of search and display advertising revenue for Yahoo!, 2009- 2013 	21
Evolution of Microsoft advertising revenues, 2009-2013	22
Search advertising on Yahoo! Bing Network	23
Evolution of Twitter advertising revenues, 2011-2013	24
3. Main trends in online advertising and personal data use	_29
Main trends in online advertising and personal data use RTB provides real time bidding benefits within an ad exchange	_29 _30
	_
RTB provides real time bidding benefits within an ad exchange	30
RTB provides real time bidding benefits within an ad exchange The RTB technology process	30 30
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process 	30 30 31
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process The technological process of FBX 	30 30 31 32
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process The technological process of FBX Example of RTB with FBX and other SSPs in action 	30 30 31 32 32
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process The technological process of FBX Example of RTB with FBX and other SSPs in action Native ads timeline 	30 30 31 32 32 33
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process The technological process of FBX Example of RTB with FBX and other SSPs in action Native ads timeline Example of HarperCollins on Buzzfeed 	30 30 31 32 32 33 33
 RTB provides real time bidding benefits within an ad exchange The RTB technology process The retargeting technology process The technological process of FBX Example of RTB with FBX and other SSPs in action Native ads timeline Example of HarperCollins on Buzzfeed Examples of analyses by Verizon Precision Marketing Insights 	30 31 32 32 33 33 35

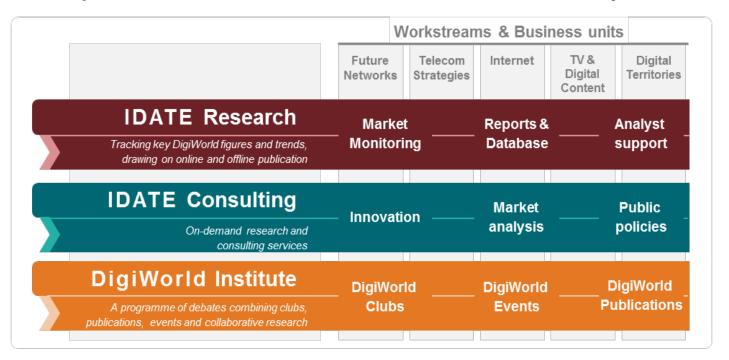


40

levels

Who we are

Founded in 1977, IDATE has gained a reputation as a leader in tracking telecom, Internet and media markets, thanks to the skills of our teams of specialized analysts. Now, with the support more than 40 member companies – which include many of the digital economy's most influential players – the newly rebranded DigiWorld Institute has entered into a new stage of its development, structured around three main areas of activity:



- •IDATE Research, an offer of market intelligence publications:

 Our expertise and client list > Research

 •IDATE Consulting, time-tested analysis:

 Our catalogue of reports > Consulting
- •DigiWorld Institute, a think tank on the digital economy: Our annual programme > DigiWorld Institute

