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OVK ONLINE REPORT 2009/02

Overview of figures and trends

AGOF

OVK Online-Vermarkterkreis im BVDW

DEAR READERS,

Online advertising driven by the recession

In spring, the Online-Vermarkterkreis (OVK) predicted a ten-percent growth in online advertising. Many considered this to be risky in 2009, the year of global economic crisis. The prediction, which has been corroborated by this report at the end of the first six months, shows, however, that it was a realistic, sound assessment of the market. It turns out that online advertising continues to grow even in a shrinking global advertising market. Even in difficult economic times, attractive forms of advertising and reliable evaluation methods can win through.

The recession has thus driven online advertising forward and has increased the shift in the advertising budget in favour of online advertising. Online advertising is still, however, part of the overall advertising economy and thus is not immune to general trends. Growth could without doubt have been stronger if the advertising businesses had not frozen or cut their total budgets in the first six months of 2009. The latest signals are therefore all the more pleasing: in July 2009, the gross advertising market for above-the-line advertising types, i.e. excluding online advertising, finally recorded growth again of 2.2 percent. The coming months will show whether this was just a glimmer on the horizon or a genuine change in fortunes. In view of the almost undimi-nished consumption climate in Germany, however, there is cause for cautious optimism that the mood will lighten in the overall advertising market too.

At any rate, there is still room for further growth in online advertising. It is already becoming apparent that online advertising will emerge stronger from the general crisis.

We hope that reading about the current facts about and background to online advertising in Germany will prove informative.

Paul Mudter
Chairman of the Online-Vermarkterkreis – Circle of Online Marketers (OVK)

TWO-DIGIT GROWTH DESPITE SHRINKING GLOBAL ADVERTISING MARKET

€4 billion threshold already surpassed in 2009

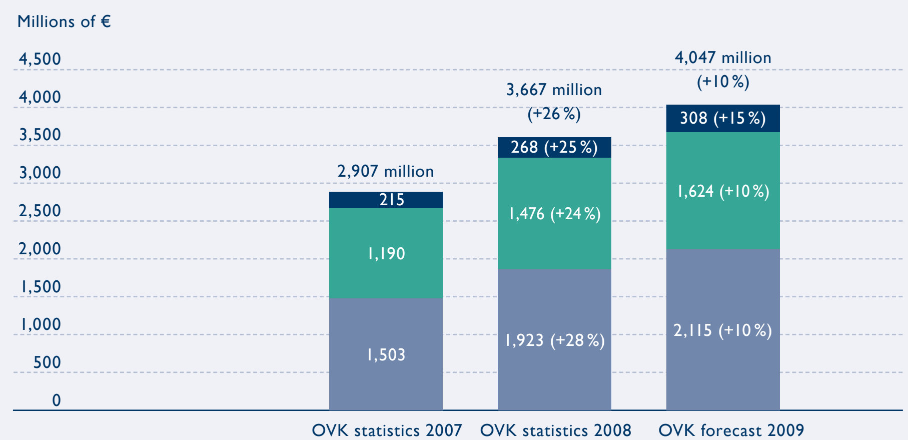
The global advertising market is currently characterised by cautious investment, yet the online advertising market continues to grow, even in the crisis year of 2009. Compared with the previous year, expenditure on online advertising will rise by ten percent as predicted by the Circle of Online Marketers. The gross volume of investment in the fields of conventional online advertising, search word marketing and affiliate networks will exceed the €4 billion threshold for the first time in 2009.

It will also bet he first time that more than €2 billion will have been invested in conventional online advertising with an underlying growth rate of ten percent. As in previous years, it will thus relegate search word marketing and affiliate marketing to second and third places, with an investment volume of €2.115 billion.

Market players are working on the basis that search word marketing will also record ten percent growth with additional investment of a mere €150 million. If estimates are correct, affiliate marketing investment volumes will exceed €300 million for the first time in 2009 – the segment is exhibiting the strongest growth of all three fields, with increases of 15 percent.

The conservative prediction that the Circle of Online Marketers made in spring has thus been corroborated. Compared to the advertising sector as a whole, online advertising is thus emerging from the crisis much stronger.

OVK advertising statistics 2007 to 2008 with forecast for 2009 by segments



Affiliate networks	215	268	308	million
Search word marketing	1,190	1,476	1,624	million
Conventional online advertising	1,503	1,923	2,115	million

Sources: OVK (extrapolation of the figures for conventional online advertising from 75 to 100% and total market for online advertising, forecasts), Nielsen Media Research (Data valid as of July 2009, data collected at allocation level for conventional online advertising) /// Data for the German market

ONLINE ADVERTISING CONTINUES TO GAIN MARKET SHARES

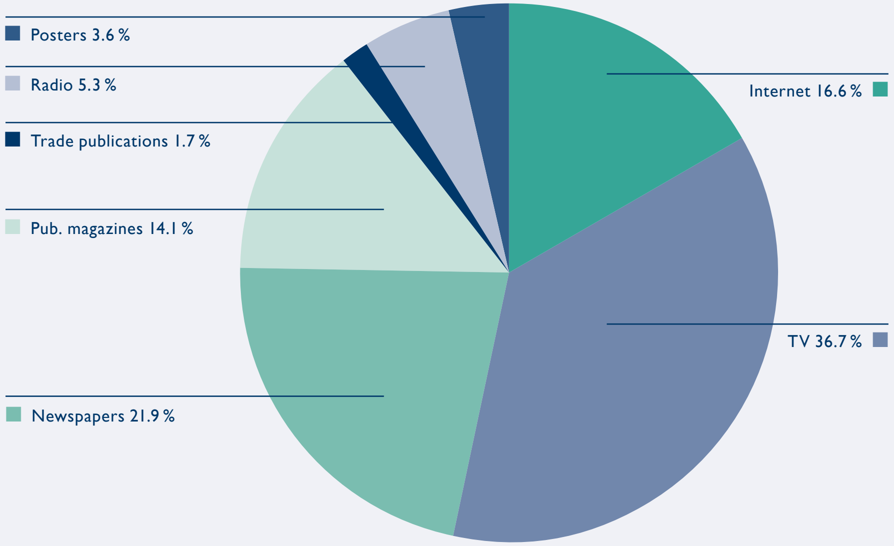
Reliable, direct campaign management is persuasive.

The trend towards increased investment in the online advertising market, which has been discernible for years, will continue in 2009. Whilst figures for classic media types are stagnant or declining, online advertising's market share will increase by around two percent. Third place behind TV and newspapers would thus be achievable for the first time.

This development is impressive testimony to confidence in comprehensive data for the planning process, the online marketers' attractive product portfolios and the detailed management possibilities. Optimum advertising presence is made possible by a sound, uniform online reach currency as the basis for media planning and precise campaign tuning by highly focused targeting in conjunction with new forms of moving image adverts. Tuning an ongoing campaign becomes an unbeatable advantage over other types of media. Online advertising is further enriched by creative campaign ideas perfectly matched to the advertising environments.

Thanks to the possibilities of multimedia, online advertising combines resilient figures and response features. The economic crisis and the associated discussions surrounding allocation of advertising budgets are making the potential of online advertising increasingly apparent.

Gross advertising pie chart predictions 2009



Source: OVK (OVK predictions 2009 including search word advertising and affiliate networks segments) and Nielsen Media Research (media trends in the media types listed, data valid as of July 2009, the trend in the first six months was taken as the basis for the whole of 2009 when extrapolating the above-the-line advertisers stated). /// Data for the German market

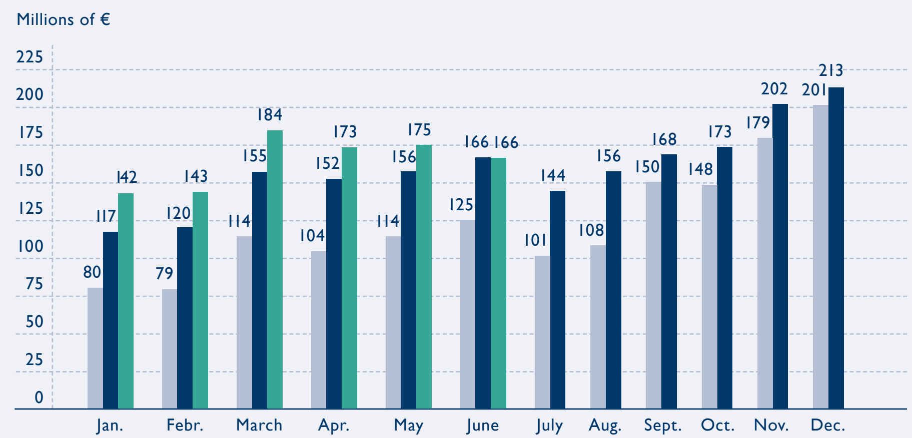
CONSOLIDATED GROWTH

Organic development

The effectiveness of online advertising, in conjunction with the diverse forms of advertising, ensured consolidated growth in gross investment in conventional online advertising for 2009. In the first half of 2009, expenditure was consistently above the previous year's level, albeit only just in the traditionally weak summer month of June.

The Internet, and thus online advertising, too, continue to attract attention due to far-reaching penetration in every social stratum (cf. p.16). Increasingly, product information is obtained from the Internet, so another rise in expenditure on online advertising is accordingly expected for the Christmas trading period. The annual growth of ten percent predicted in the first half of 2009 has once again been confirmed. Even in times of recession, the technical requirements and the medium's steadily increasing attractiveness form a solid basis for positive development in the sector.

Monthly development of gross advertising investment in conventional online advertising



	Jan.	Febr.	March	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
2007	79.8	79.1	113.9	104.0	114.0	125.0	100.7	107.8	149.7	148.1	179.2	201.3	million
2008	117.3	120.1	155.2	152.2	155.8	166.2	144.3	156.0	168.1	173.2	201.7	213.2	million
2009	142.4	143.1	184.4	173.0	175.1	166.3							million

Source: OVK (figures extrapolated from 75 to 100%), Nielsen Media Research (data valid as of August 2009, Nielsen data adjusted by a commission share from search word marketing) /// Data for the German market

WALLPAPER INCREASES FURTHER, VIDEO ADS BOOM

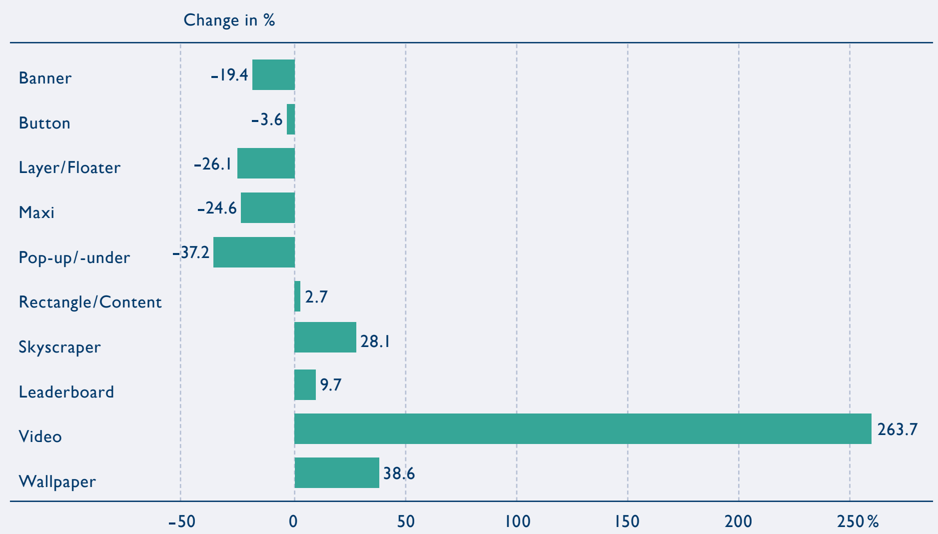
Playing to one's strengths with the correct formats

As in previous years, the standardised advertising formats of the universal ad package are among the most frequently booked online formats. These forms of advertising offer all customers a high level of comparability in terms of production, delivery and pricing, as a result of support from all OVK members. The basic package has proved to be a reliable foundation. Skyscrapers, showing 28.1 percent growth, are enjoying increasing use.

Wallpaper continues to grow in attractiveness alongside standard forms of advertising. It has now assumed a leading position as a widely established form of advertising, with an increase of 38.6 percent.

As in previous years, the growth in video ads has been exceptionally strong, at a rate of 263.7 percent. The creative scope of this innovative format offers an attractive alternative to conventional forms of advertising. The continual increase in provision of more efficient Internet connections promises great potential for growth of the format in the future, too.

Developments in the advertising format top 10
First half 2009 compared with first half 2008



Source: Nielsen Media Research (data valid as of July 2009) /// Not all marketers offer reports with a complete breakdown of the information. Due to the occasionally incomplete information, the individual reports on groups have been summarised in order to allow an overview of percentile changes in the advertising formats ordered. /// Basis: excludes AdLINK Media Germany, ad pepper media, Auto Scout24 Media, BAUER MEDIA KG, BILD digital GmbH & Co. KG, Hi-Media Deutschland, Interactive Media CCSP GmbH, mobile.de, SPiN AG and Ströer Interactive /// Data for the German market

INCREASING ATTRACTIVENESS OF ONLINE ADVERTISING

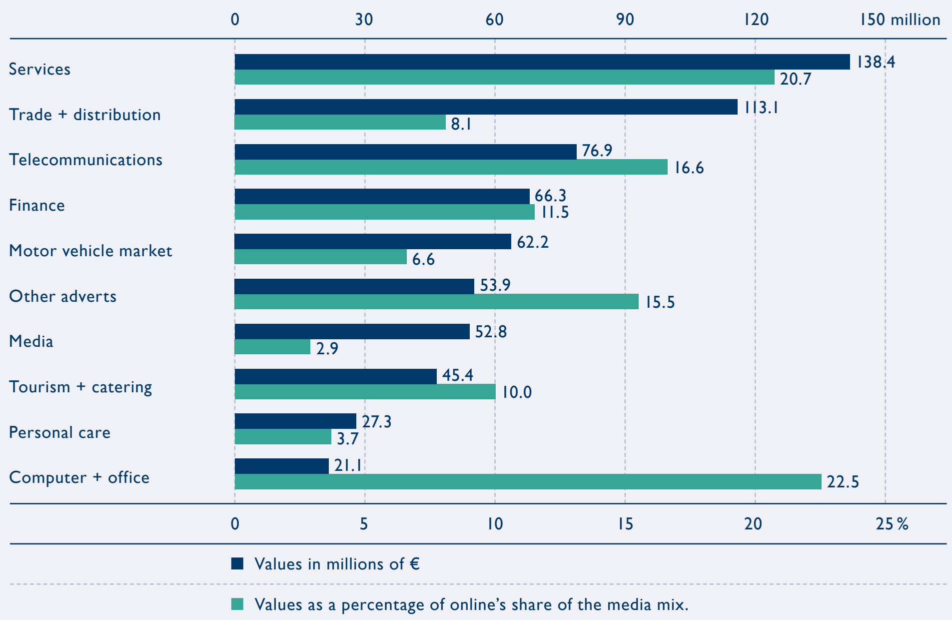
Important sectors increase online share of media mix.

A look at online advertising investment by individual business sector highlights the fact that a gradual growth in investment is taking place from sectors that were previously rather poorly represented. Thus, in the first half of 2009, the commercial and shipping sector increased online advertising's share of the media mix, compared to the period for the previous year, by 3.3 percentage points to 8.1 percent. The share is still, however, far below the average percentage (cf. p. 8 ff.). Here, as in the motor vehicle market, the media industry and personal care products, there is still enormous untapped potential.

The service industry sector and the commercial and shipping sectors take first and second places with investments of €138 million and €113 million respectively. In addition, the telecommunications sector is recording notable growth of 5.2 percentage points. The computer and office sector once again increased its traditionally high commitment to the online sector significantly, to a 22.5 percent share of the media mix in the first half of 2009.

In comparison with the previous year, the overall trend shows that almost all sectors are investing more heavily in the online sector. Increased shares of the media mix in eight out of the ten named sectors highlight the increasing importance of online advertising. Across all these sectors, online advertising's share of the media mix has risen by up to 9.3 percentage points compared with the previous year.

Advertising investment in conventional online adverts by area of business for the first half of 2009



Source: Nielsen Media Research (Data valid as of July 2009) /// Basis: top 10 areas of business /// Data for the German market

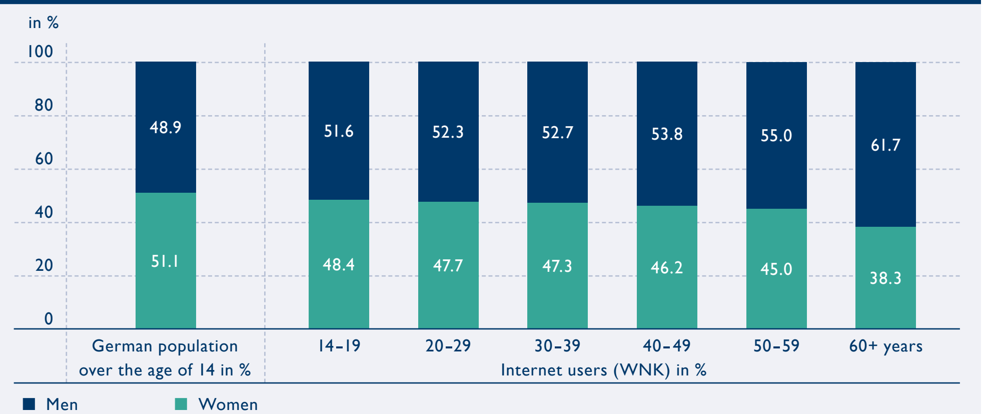
TWO IN THREE GERMANS ARE ONLINE

43.20 million Germans over the age of 14 are Internet users.

66.6 percent (43.20 million) of the German resident population aged 14 and over have been online in the last twelve months, and 65.1 percent (42.22 million) have used the Internet at least once within the last three months (a category termed "Weitester Nutzerkreis", or WNK). This online reach is impressive proof of the regular Internet use among Germans and emphasises the role the online medium plays as an equal advertiser in the media mix.

The broad establishment of the Internet at all levels of the population has lead to the demographic structure of Internet users steadily catching up with that of the population as a whole. In the meantime, where 14- to 29-year-old Internet users are concerned, it is possible to talk of an almost equal division of the sexes, as the proportion of women is gradually approaching the 50 percent mark. Women are generally above the 40-percent mark for 30- to 59-year-old Internet users, too. Only in the over-60s age group is the proportion of female users currently below average, at 38.3 percent.

Division of the sexes by age group



Basis/Source: 51.6% of Internet users (WNK) between 14 and 19 are male and 48.4% female. /// Basis: /// 103,249 unweighted cases (Internet users in the last three months) / 115,796 cases (resident population over 14) / Values in percent /// Source: AGOF e.V. / internet facts 2009-III /// Data for the German market

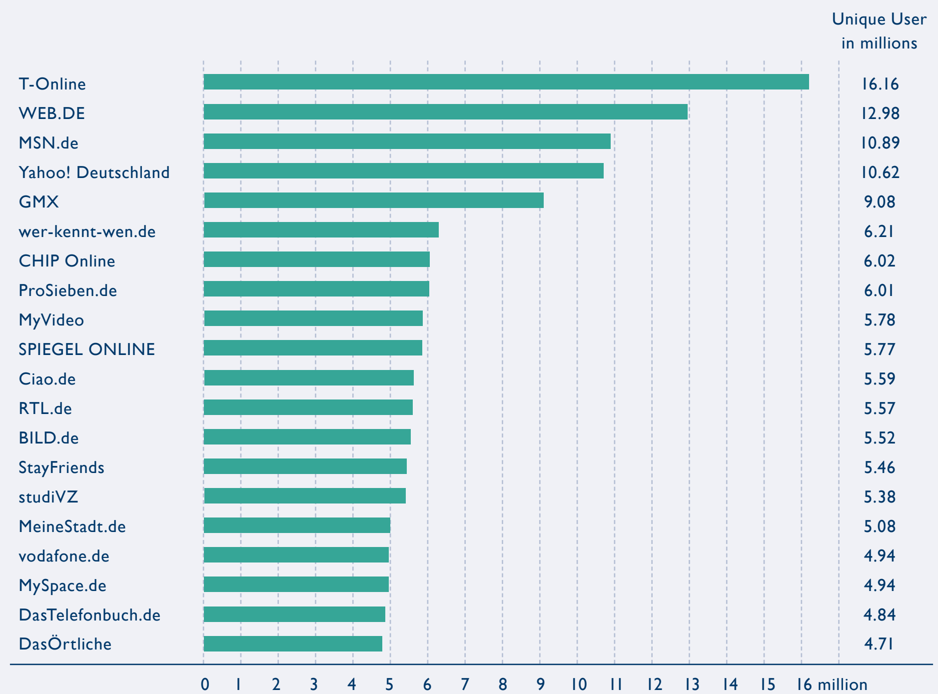
REACH OF TOP 20 ONLINE MEDIA OFFERINGS

The AGOF currently measures data for 580 websites in internet facts 2009-I.

With 580 online offerings included in the study and 2,770 insertion units, the AGOF has reached new peaks in internet facts 2009-I, thus emphasizing the study's considerable relevance to online media planning.

As the following diagram of the top 20 online media offerings shows, T-Online tops the rankings with 16.16 million users per month, followed by WEB.DE with 12.98 million and MSN.de with 10.89 million unique users.

AGOF ranking of the top twenty online offerings in Germany in an average month



Number of Unique User (in millions) for an average month in the period under investigation - January to March 2009 /// Basis: 103,249 unweighted cases (Internet users from the last three months) /// Source: AGOF e.V./internet facts 2009-III /// Data for the German market

REACH OF THE MARKETERS IN THE OVK

In total, 70 marketers are measured in internet facts 2009-I.

The internet facts demonstrates the net reach of the marketers operating together in the AGOF. The following table shows the net reach of the marketers organised in OVK based on the marketer offerings compiled in the internet facts 2009-I. A marketer's net reach does not always include their entire portfolio.

Net reach of online marketers in the OVK

Marketers	Reach in % (based on Internet users from the last three months)	Net reach in millions of Unique User
AdLINK Media Germany	17.5	7.39
allesklar media	15.5	6.53
Axel Springer AG	31.0	13.10
BAUER MEDIA KG	4.0	1.69
eBay Advertising Group GmbH	9.8	4.12
G+J Electronic Media Sales GmbH	31.8	13.41
InteractiveMedia CCSP GmbH	44.9	18.97
IP Deutschland GmbH	31.0	13.09
iq media marketing	32.3	13.62
MAIRDUMONT MEDIA	4.9	2.06
Microsoft Advertising	35.0	14.77
netpoint media GmbH	7.0	2.94
OMS	23.4	9.89
Platform-A Media	36.2	15.30
QUALITY CHANNEL GMBH	22.3	9.42
SevenOne Media GmbH	42.6	17.99
TOMORROW FOCUS AG	40.6	17.13
Unister Media	16.3	6.90
United Internet Media AG	47.9	20.24
Yahoo! Deutschland GmbH	31.7	13.38

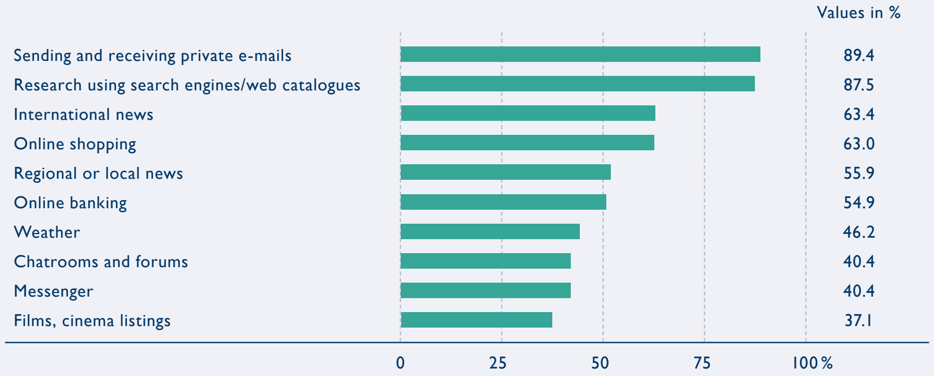
Number of Unique User (in millions and percent) for an average month in the period under investigation – January to March 2009 /// Basis: 103,249 unweighted cases (Internet users from the last three months) /// Source: AGOF e.V. / internet facts 2009-I /// Data for the German market

THE INTERNET HAS BECOME A FIXTURE OF EVERYDAY LIFE

Online use for communication, information and transaction purposes

The range of online information sources used generally shows that the Internet has established itself across virtually all areas of life. Sending and receiving private e-mails still takes first place with 89.4 percent (37.73 million) of Internet users, followed by research using search engines or web catalogues for 87.5 percent of users (36.95 million). More than half of users use international, regional or local news, e-commerce and online banking services and now also conduct activities online that they used to deal with offline. 19.52 million people (46.2 percent) use weather services. Furthermore, around 17 million people use chatrooms and forums or messenger for social networking. Other key uses are looking up cinema listings or test results and accessing employment, property or dating websites.

Key usage areas – Top 10



Basis/Source: 63.4% of all Internet users (WNK) use international news services at least occasionally. /// Basis: 103,249 unweighted cases (Internet users during the last three months) / "How frequently do you use the following sources of information or offers: frequently, occasionally, rarely or never?" / Top-two box is illustrated: frequent or occasional usage / values in % / the top 10 from a total of 22 subjects are shown /// Source: AGOF e.V. / internet facts 2009-I /// Data for the German market

GENDER DISTRIBUTION IN THE SUBJECT AREAS

The Internet also reveals gender-typical subject preferences.

Generally speaking, the emphasis in an online offer's content also has an impact on the user structures represented here. A comparison of men's and women's shares of the various areas of use by subject highlights this effect and provides an illustration of the "typical" male and female environments on the Internet.

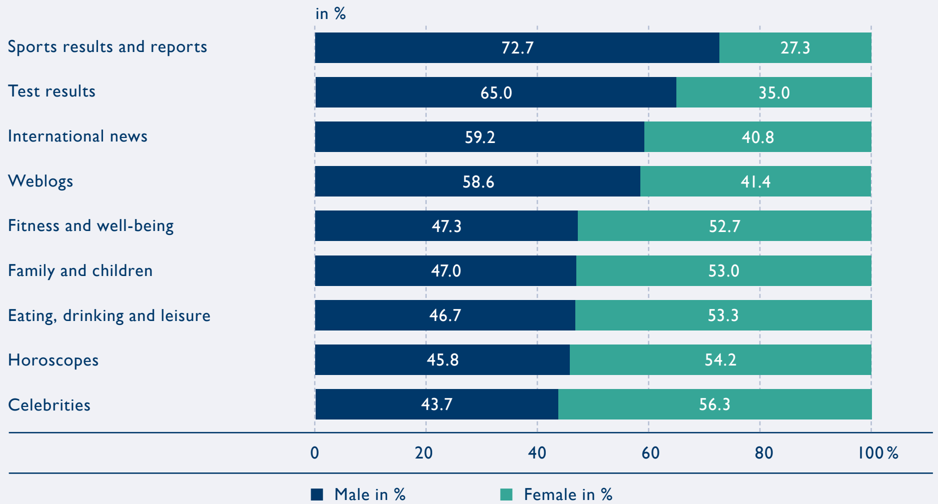
Male users are in the clear majority as regards online offerings related to sports results and reports, test results, news about world events or blogs. Conversely, websites on topics such as celebrities, horoscopes, food, drink and leisure, family and children, or fitness and well-being are "typical female environments", as the high proportion of female users in these areas proves.

AGE STRUCTURES IN THE SUBJECT AREAS

A look at the age structures in the various subject areas shows that the key areas of interest and the behaviour of users change depending on age and associated activities. Thus Internet users under 29, for example, are over-represented in communicative environments such as flirting and dating, chatrooms, forums and instant messaging. 30- to 49-year-old users prefer offers relating to children, and family or property websites, whilst over-50 users in particular are represented in environments such as food, drink and leisure, and regional or local news.

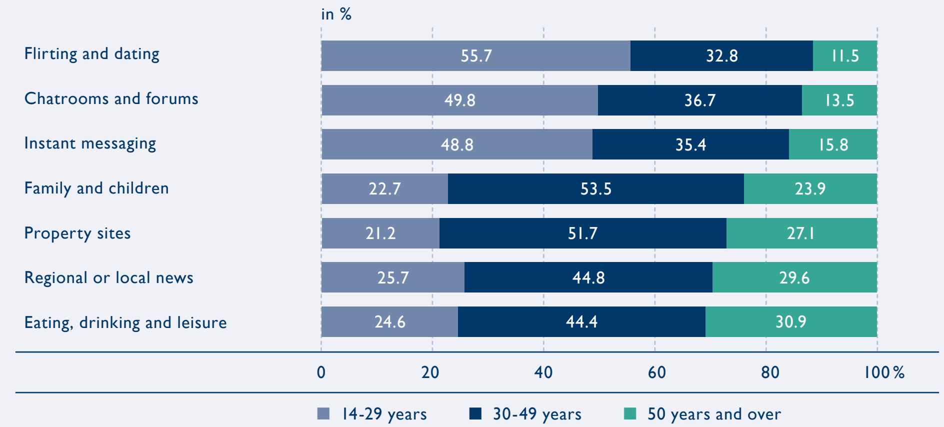
Important factors in the lives of different generations come to light in subjects accessed online.

Gender ratio in the subject areas



Basis/Source: 72.7% of men and 27.3% of women use sports results at least occasionally. /// Basis: 103,249 unweighted cases (Internet users during the last three months) / "How frequently do you use the following sources of information or offers: frequently, occasionally, rarely or never?" / Top-two box is illustrated: frequent or occasional usage / Data in percent /// Source: AGOF e.V./internet facts 2009-I /// Data for the German market

Age distribution in the subject areas



Basis/Source: Up to 55.7% of 14 to 29 year-olds use flirting and dating sites at least occasionally, up to 32.8% of 30 to 49 year-olds and up to 11.5% of Internet users (WNK) over 50 years old. /// Basis: 103,249 unweighted cases (Internet users during the last three months) / "How frequently do you use the following sources of information or offers: frequently, occasionally, rarely or never?" / Top-two box is illustrated: frequent or occasional usage / Data in percent /// Source: AGOF e.V. / internet facts 2009-I /// Data for the German market

THE INTERNET AS AN EVERYDAY INFORMATION AND TRANSACTION MEDIUM

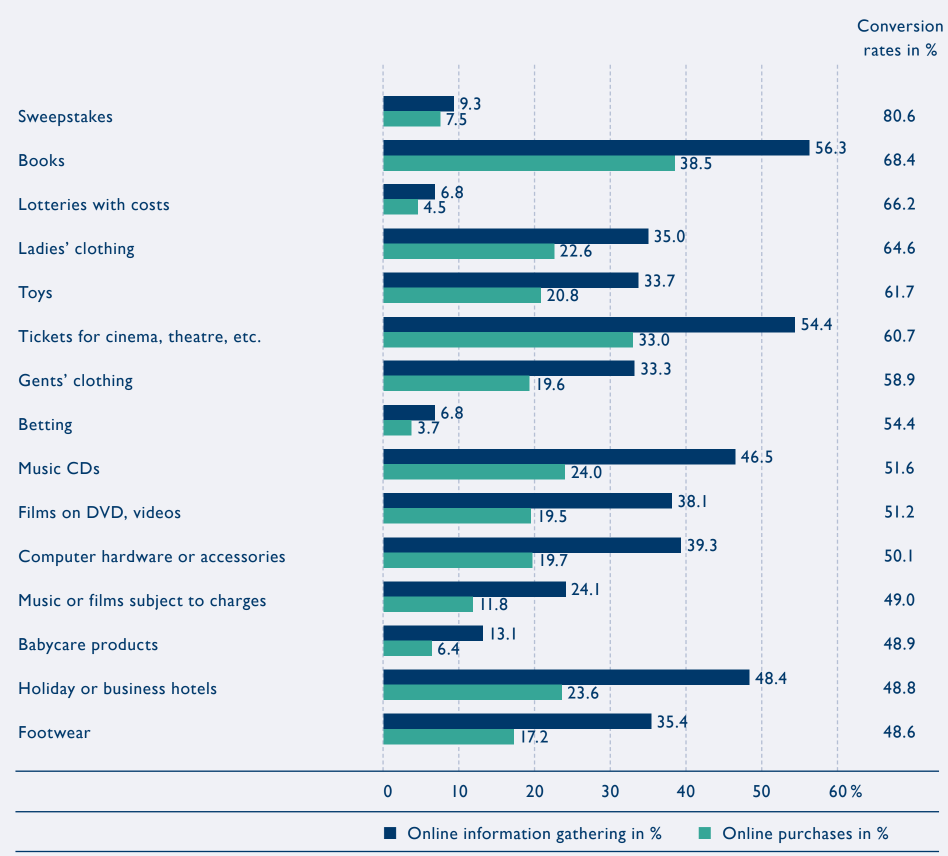
Online research is a fixed component of the orientation and decision-making phase prior to a purchase, irrespective of whether it is made online or offline.

Widespread use of the Internet also affects the purchasing behaviour of many consumers. Practically all surfers (97.2 percent; 41.04 million) use the Internet to obtain product information. The main online searches are for books, holidays and last minute trips, tickets, hotels for holiday and business travel and music CDs.

The proportion of Internet users who are online shoppers is around 85.2 percent, i.e. 35.97 million people have bought goods online in the last twelve months. Books, tickets, music CDs and hotel and holiday reservations are right at the top of the online shopping list.

The close relationship between Internet information searches and online purchasing becomes clear when you consider the online conversion rate, i.e. the number of online browsers who become online shoppers. In first place in this regard, with a conversion rate of 80.6 percent, come the sweepstakes. In other words, more than four-fifths of people who look for information about sweepstakes online go on to buy a ticket/take part in the competition. These are followed by books, lotteries with costs, ladies' clothing, toys, tickets, gents' clothing, betting, music CDs, films on DVD or video and computer hardware. For all these products, the proportion of online purchasers is more than half of those browsing the Internet or, expressed another way: more than 50 percent of browsers become buyers.

Conversion rates for the top 15 products

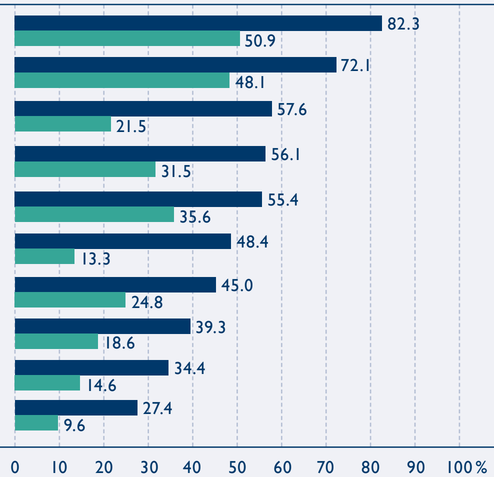


Basis/Source: 56.3% of Internet users (WNK) have obtained information about books on the Internet, and 38.5% have purchased books online. This equates to a conversion rate from information seekers to purchasers of 68.4%. /// Basis: 103,249 unweighted cases (Internet users over the last three months) / "For which of the following products have you ever used the Internet to look for information?" / "Have you bought any of the following products via the Internet in the past 12 months?" /// Data expressed as a percentage / The top 15 from a total of 59 products are shown /// Source: AGOF e.V. / internet facts 2009-I /// Data for the German market

LATEST POTENTIAL VIEWED BY SECTOR BASED ON INTERNET FACTS 2009-I

The AGOF sector reports show the customer potentials for individual sectors that can be found online.

Sector potentials for prospective customers looking for information online and for online purchasers; Basis of Internet users (WNK): 42.22 million unique users



Sector	Online information gathering in %	Online purchases in %	Unique users in millions: Information	Unique users in millions: Purchases
Travel sector	82.3	50.9	34.76	21.49
Entertainment sector	72.1	48.1	30.42	20.30
Entertainment electronics sector	57.6	21.5	24.33	9.08
Music sector	56.1	31.5	23.67	13.29
Fashion sector	55.4	35.6	23.38	15.05
Car sector	48.4	13.3	20.42	5.62
Computer sector	45.0	24.8	19.00	10.47
Cosmetics sector	39.3	18.6	16.58	7.87
Sports sector	34.4	14.6	14.54	6.17
FMCG food & beverages sector	27.4	9.6	11.56	4.07

Basis/Source: 82.3% of Internet users, which equates to 34.76 million unique users, have gone online at least once in the past to find information on travel products. /// Basis: 103,249 unweighted cases (Internet users over the last three months) / "For which of the following products have you ever used the Internet to look for information?" / "Have you bought any of the following products via the Internet in the past 12 months?" /// Data expressed as a percentage and in millions of unique users /// Source: AGOF e.V. / _internet facts 2009-I_

The products studied in the context of the respective sector analysis can be subdivided as follows:

Travel	Rail tickets, flights with budget airlines, etc., hotels, hire cars, holidays and last-minute travel
Entertainment	Computer and video games, theatre and concert tickets, etc., films on DVD/videos
Entertainment electronics	Flat-screen TVs, DVD players/recorders, hard-disk recorders, home cinema/surround-sound systems, digital cameras, navigation systems
Music	Music CDs, chargeable music/film downloads from the Internet
Fashion	Ladies' or gents' clothing, shoes
Automotive	used cars, new cars, hire cars
Computers	Computer hardware or accessories, computer software excluding games
Cosmetics	Cosmetics for women/men, perfume for women/men, bodycare, haircare or dental care products
Sport	Sports goods and equipment
FMCG food & beverages sector	Non-alcoholic drinks, beer, other alcoholic drinks and spirits, frozen products and ready meals, dairy products, confectionery and salted snacks

THE INTERNET AS A SHOP WINDOW, PERSONAL SHOPPER AND SHOPPING MALL

As a digital high street, the online medium allows modern brand communication and far-reaching target group appeal.

The latest AGOF analysis of potential purchasers for the fashion and shoe sector to be reached online based on internet facts 2009-I shows the great importance that Internet users attach to clothing. Thus three-quarters (71.9 percent or 30.37 million) of Internet users are interested in fashion or shoes. More than half (55.4 percent or 23.38 million) of Internet users have searched for information on these products online at least once and have thus obtained a rapid overview of products available from various suppliers. Furthermore over a third (35.6 percent or 15.05 million) have already bought these items on the Internet. The Internet has therefore established itself as both an information and transaction medium for fashion and shoes, too.

A slightly above-average proportion of women – more than 50 percent are women – is characteristic of fashion and shoe-savvy surfers, as is a markedly above-average representation, at more than 80 percent, in the 14 to 49 year-olds advertising age group. It is primarily the young age group between 14 and 29 years – and this accounts for more than one third of users interested in fashion – that is growing up with the Internet as an obvious medium to use when looking for the latest fashion and styling trends.

The Internet represents a far-reaching advertising and sales platform for the fashion and shoe industry with this large number of potential customers to be reached online. Advertisers can reach new potential buyers online and at the same time increase the dialogue with their target groups. It is possible to generate effective motivation for subsequent online or offline purchases alongside targeted product information while preparing to purchase. In the process, online advertising not only facilitates rapid development of reach within a wide group of consumers, it also address highly specific target groups, such as for outdoor or street clothing.

CONSOLIDATED GROWTH TREND

Advertisers in Scandinavia and UK focus heavily on online advertising.

Within the total European advertising market, which is declining overall, in 2008 online advertising's total earning volume was €12.9 billion. The adjusted statistic confirms 20 percent growth in the market. It is thus exhibiting extremely positive development, contrary to the general trend. The six nations of Great Britain, Germany, France, the Netherlands, Italy and Spain account for the lion's share, at 81 percent, of total turnover in the field of online advertising. The remaining 13 countries turned over a total of €2.4 billion in 2008. For the previous year's participants, this equates to a 27 percent increase.

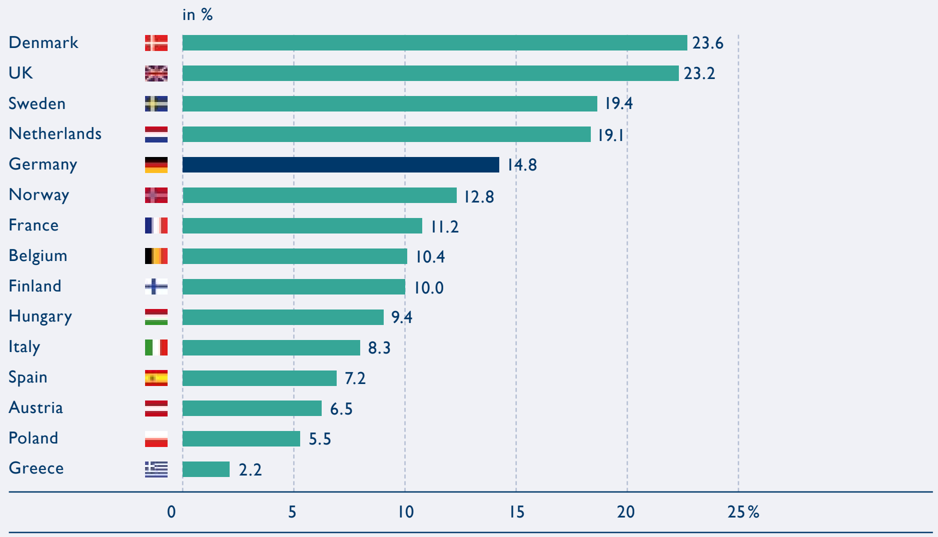
Online advertising in Denmark has the biggest share of the media mix at 23.6 percent, closely followed by the UK with 23.2 percent. Here, more than one in five advertising euros or every fifth advertising pound is already invested in online advertising. Germany previously ranked fifth in these statistics.

GRADUAL CONVERGENCE

Europe is catching up.

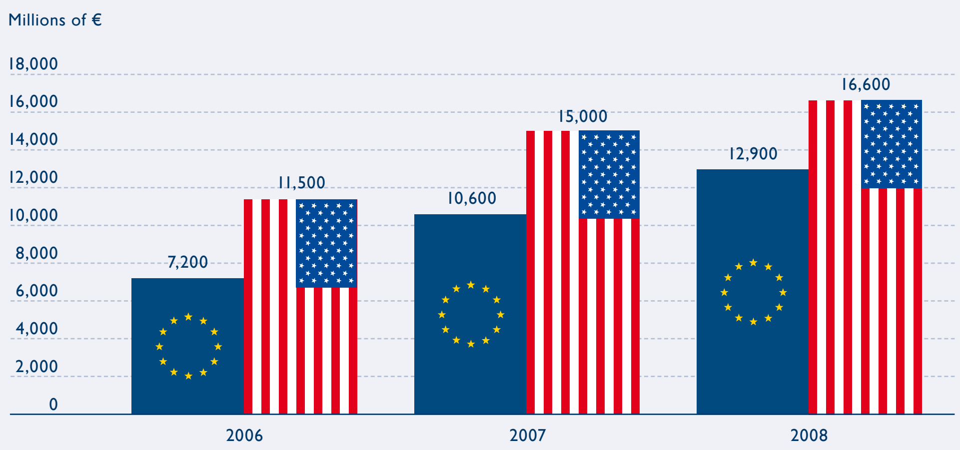
The European online advertising market is rapidly catching up with the American market. The growth curve may be levelling off in both markets – also caused by the economic crisis – but, whilst the American market recorded growth of 10.6 percent, the European market has been able to catch up further with a gain of around 20 percent. If the gap between Europe and the US market still amounted to €4.4 billion in 2007, by 2008 it had fallen to €3.7 billion. More convergence is expected in the coming year.

European comparison of online advertising shares of overall media mix



Source: AdEx Report 2008 (IAB Europe/PwC, WARC)

The European online advertising market versus the USA



Source: AdEx Report 2008 (IAB Europe/PwC) and previous surveys

THE DEFINITIVE COMMITTEE FOR ONLINE ADVERTISING ISSUES

Remit: set standards and create transparency

The OVK (Online-Vermarkterkreis, or Circle of Online Marketers) is the central body of online marketers in Germany. Twenty-one of the largest German online marketers have come together under the umbrella of the BVDW (Bundesverband Digitale Wirtschaft e.V. or German Association for the Digital Economy) to steadily raise the profile of online advertising. The Association's primary aims are to increase market transparency and planning reliability as well as to draw up standardisation and quality assurance measures for the industry as a whole.

To this end, the OVK develops standards for advertising formats and reach currencies ("Reichweitenwährungen") that help make it easier to produce, deliver and monitor online campaigns. These standards are constantly being extended in due consideration of changing market requirements.

WORKING SUCCESSFULLY TOWARDS A COMMON GOAL

Promoting development of the market with fundamental principles

The AdTechnology Standards and Targeting working group reports to the OVK. The AdTechnology Standards working group develops advertisement standards that are jointly backed by all the members of the OVK. The group's aim is to make the production and delivery of online campaigns easier for clients and to make the going-live run smoothly. These standards are constantly being extended and adapted to the needs of the market.

The core aim of the Targeting working group is to work actively on awareness and transparency. These efforts to promote transparency, both B2B and B2C, include defining terms and above all explaining methodology and user rights. In the long term, the Targeting working group will make an important contribution to accomplishing binding minimum requirements.

The OVK also organises conferences, studies and development measures relevant to the sector and is active in national and international bodies for the further development of the online advertising market. The organisation facilitates networking between members and external partners, makes available valuable market data for online strategies and honours unique concepts for online campaigns.

REPRESENTATIVE OF INTEREST OF THE DIGITAL ECONOMY

BVDW
Wir sind das Netz

The Bundesverband Digitale Wirtschaft (BVDW) e.V. is the organisation that represents the interests of companies in the field of interactive marketing, digital content and interactive added value.

The BVDW has an interdisciplinary foundation, and thus has a holistic overview of the issues facing the digital economy.

It has taken on the task of making the efficiency and the benefits of digital media transparent, and thus promoting their deployment in the economy as a whole, in society, and in administration.

BVDW is engaged in continuous dialogue with politicians, the media and other interest groups, and supports the dynamic development of the sector in a results-oriented, practical and effective way.

We are the Net

THIS YEAR INTERNET FACTS IS FOLLOWED BY MOBILE FACTS, A NEW AGOF STUDY

AGOF

In parallel with the publication of the internet facts 2009-1, the ma Online has been published for the first time. This means that, with immediate effect, the media reach currency for the online category – the unique user established by the Arbeitsgemeinschaft Online Forschung (Working Group for Online Media Research, or AGOF) – will be published under the umbrella of the Arbeitsgemeinschaft Media-Analyse (ag.ma), but will remain a central part of the content of internet facts and will continue to provide the planning basis for the online medium in the customary way in conjunction with the TOP planning tool developed by the AGOF.

Publication of online reaches under the umbrella of ag.ma highlights the importance achieved by the online category in the media mix and is further proof of the AGOF's successful work in recent years. With the internet facts and the Unique User value for measuring effectiveness, the AGOF has established the de-facto currency for online reach, and this serves as a basis for sound online media planning in the market. In combination with the market data contained in internet facts, this creates a stable planning foundation for Internet advertisers. The AGOF currently has 17 full members and 61 licensees.

Furthermore, in summer 2009, with the establishment of AGOF mobile, the AGOF has created the fundamental requirements for collecting and allocating reaches and planning data for mobile online offers as part of the planned market media study known as mobile facts. AGOF mobile will be responsible for both developing and realising the underlying study model and implementing the study, as well as for the methodical structuring of mobile reach measurement, and thus collaborate closely with the Mobile Advertising Circle (MAC) within the Bundesverband Digitale Wirtschaft (BVDW) e.V. As a second study alongside established the internet facts, the mobile facts represents the next building block in the portfolio of market media studies published and planning tools made available by the AGOF.

ENHANCED AGOF SERVICE FOR ONLINE MEDIA PLANNING

Release of TOP 2.0 and expanded seminar programme at the AGOF Academy

A new version of the AGOF's planning tool will be released in autumn 2009 at the same time as internet facts 2009-II is published. In order to gear TOP functionality even better to the needs of market partners and users, in recent months the AGOF has implemented comprehensive workshops and feedback sessions to determine the predominant requirements of everyday planning. As a result of these discussions, it has been possible to make the TOP 2.0 planning process even more user-friendly and convenient, because the tool is now even better suited to the complexities of online media planning. Users will be supplied with TOP 2.0 in conjunction with the internet facts 2009-II data set.

In recent months the range of seminars at the AGOF Academy has been expanded again due to high demand and now comprises seven seminars, which can be subdivided into three central topic areas – TOP training, using data from internet facts and basic knowledge. The range of seminars now not only meets the needs of agencies and marketers, but also those of advertisers and media researchers. The following seminars are new:

- "Wir machen Sie fit – Argumente aufspüren mit der internet facts" (We get you fit – track down arguments with internet facts"):
- "Dem User auf der Spur – Online-Mediaplanung" ("On the trail of the user – online media planning"): from market analysis to planning process in one day
- "Transparenz in der Online-Forschung" ("Transparency in online research"): from technical measurement to reach

Further details of seminars and associated costs as well as additional information about the AGOF Academy and its trainers can be downloaded from the Internet at www.agof.de/akademie.

CALCULATION OF GROSS ADVERTISING EXPENDITURE

Qualitative features instead of crawler statistics

Unlike other data acquisition methods, the OVK's online advertising statistics do not rely on so-called 'crawling statistics', so that the qualitative properties in particular of online advertising campaigns, such as targeting, CPC business or advertising in password-protected areas, can be illustrated more accurately. The calculation of gross advertising volume in conventional online advertising is based on the online advertising statistics from Nielsen Media Research. This in turn is based on postings from a group of marketers (currently 24) who report on a monthly basis the gross advertising expenditure as recorded in accounts systems and ad servers.

All the data are evaluated with reference to the applicable price lists and the media performances achieved. This approach enables direct comparisons to be made with printed adverts in other types of media that are covered by the Nielsen advertising statistics; the printed adverts are likewise evaluated gross. Altogether, around 75 percent of the conventional online advertising market is covered by the Nielsen online advertising statistics. To enable a picture to be formed of the entire online advertising market, the data is extrapolated and the volume of advertising from other sectors is added in.

In cooperation with leading providers, BVDW determines the turnover figures in the areas of search word marketing and affiliate networks. Search word marketing is viewed here in the simplified form of "net equals gross", since remuneration is calculated on an individual basis dependent on results, and no general gross price lists exist. For the affiliate networks, gross turnover is quoted and includes publisher commission, network charges and agency discounts.

SECTOR DEFINITIONS

Display ads, special advertising formats, search word marketing and affiliate marketing

Conventional online advertising includes what are referred to as display ads, which are made up of banner, skyscraper, rectangle or wallpaper ads. On the other hand, it also includes the integration of advertisers' content with online advertising facilities. Sponsorship, microsites and multimedia content are all examples. Charges for advertising are generally based on the Cost Per Lead (CPL).

Search word marketing refers to search words to which a charge applies. Here, advertisers pay for a specified position to include their link in the display area of popular search engines. The advertiser decides on the search words and corresponding links. Charges apply based on the number of clicks (CPC).

There are many web offerings – numbers often run into the hundreds – with a less impressive reach (so-called affiliates) and on which advertising is included; these are known as affiliate networks. Unlike conventional online advertising, but in line with search word marketing, charges are generally levied based on the number of clicks. Charges may also be based on the number of sales achieved as a result of (and definitively attributable to) online advertising.

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