

2009 Year-in-Review Benchmarks

DoubleClick EMEA Report

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2009 Year-in-Review Benchmarks: EMEA Region

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www.doubleclick.com

The DoubleClick Benchmarks Report is a free report of industry benchmarks that helps advertisers, agencies, and publishers evaluate the performance of online display advertising campaigns in the EMEA Region, relative to industry norms.

DoubleClick benchmarks are derived from a robust data set of metrics across DoubleClick for Advertisers (DFA), based on rigorous methodology with input from the Advertising Research Foundation. This data set includes hundreds of advertisers, thousands of campaigns, and tens of billions of ad impressions.

Data shown here represent activity of a wide range of ad formats for DFA advertisers in the EMEA Region from January to December 2009, unless otherwise indicated.

Executive Summary

Overall EMEA campaign performance norms for 2009 across DoubleClick image, Flash, and rich media campaigns are as follows -

Country	Click-through Rate (CTR) %	Interaction Rate %	Average Interaction Time (secs)	Average Display Time(secs)
EMEA Region*	0.09	2.41	9.31	34.70
France	0.12	3.90	7.14	27.60
Germany	0.11	2.90	8.60	33.33
Italy	0.10	3.52	7.46	36.14
Netherlands	0.14	4.49	7.46	34.85
United Kingdom	0.07	2.29	9.62	35.21

Source: DoubleClick Benchmarks, EMEA DFA campaigns, January to December 2009

*These benchmarks for the EMEA Region encompass significant volumes of campaigns run in Austria, Belgium, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Russia, Spain, Sweden, Switzerland, United Arab Emirates, and the United Kingdom.

For more country level data see the final section on Worldwide Performance Norms.

Unless otherwise stated the data in this report takes data from campaigns across the whole EMEA Region and treats them in aggregate, with no country specific weighting applied. This means that campaigns from higher volume countries, such as the UK, France and Germany, will have a much greater role in defining the benchmarks than those from lower volume countries, such as Russia, Portugal, Greece and Hungary.

Key Observations:

Ad size appears to be roughly associated with click-through and interaction rates, as we have observed in previous years.

Static ads achieve higher click-through rates, with non-static ads offering interaction as an alternative.

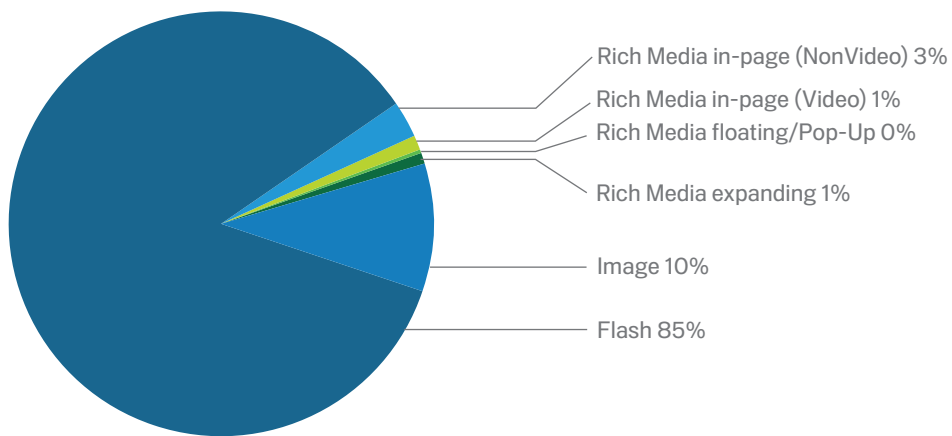
Vertical performance may be linked to impression volumes. The CPG and Tech verticals achieve the highest click-through rates and among the highest interaction rates compared to other vertical segments. The lowest rates are experienced in the competitive high volume verticals: financial services, media/entertainment, telecom and travel.

Observations through 2008 and 2009 show click-through rates declining steadily and this reflects the rise of Flash and rich media interaction as an alternative mode of engagement. It is also apparent that interaction time tends to rise when the interaction rate falls, so that as users overall interact less with ads, those who continue to interact do so for longer.

DFA Impressions by Creative Type

Data on the distribution of impressions by type of creative format was a popular request in response to last year’s benchmarks report so we included this information in the report this year. Note that as with other benchmarks in this report, this data reflects impressions served through the DoubleClick for Advertisers platform.

DFA Impressions 2009



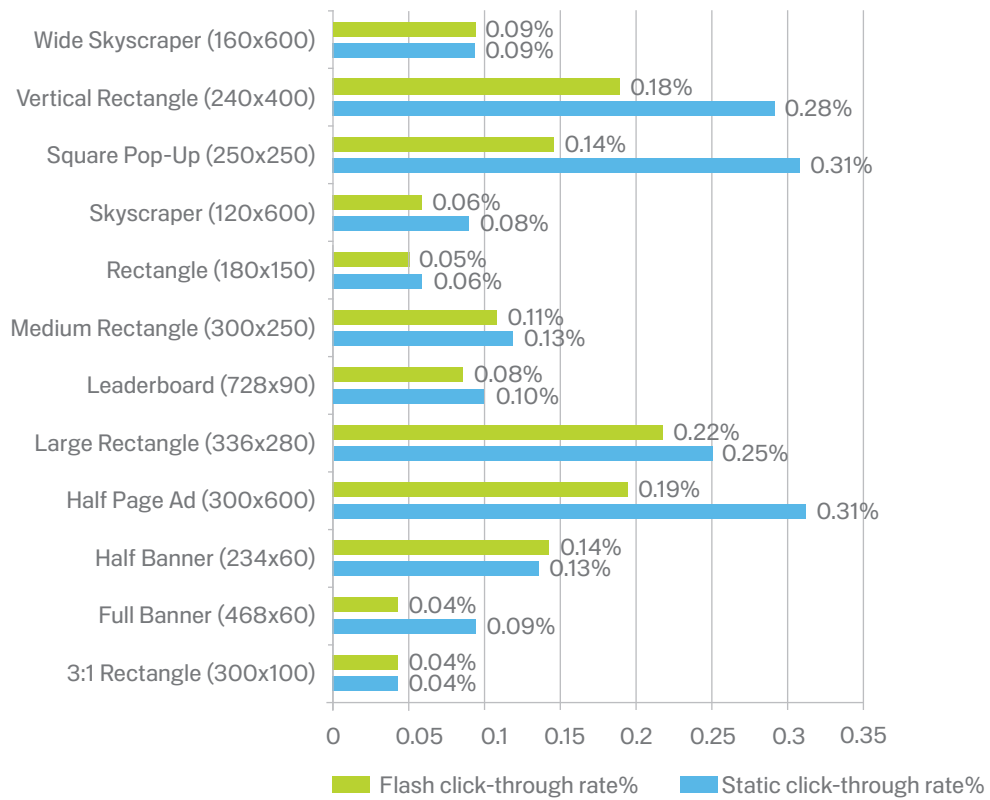
Source: DoubleClick Benchmarks, EMEA DFA campaigns, January to December 2009

Static Image Ads and Flash Ads Benchmarks

Overall Click-Through Rate (CTR)

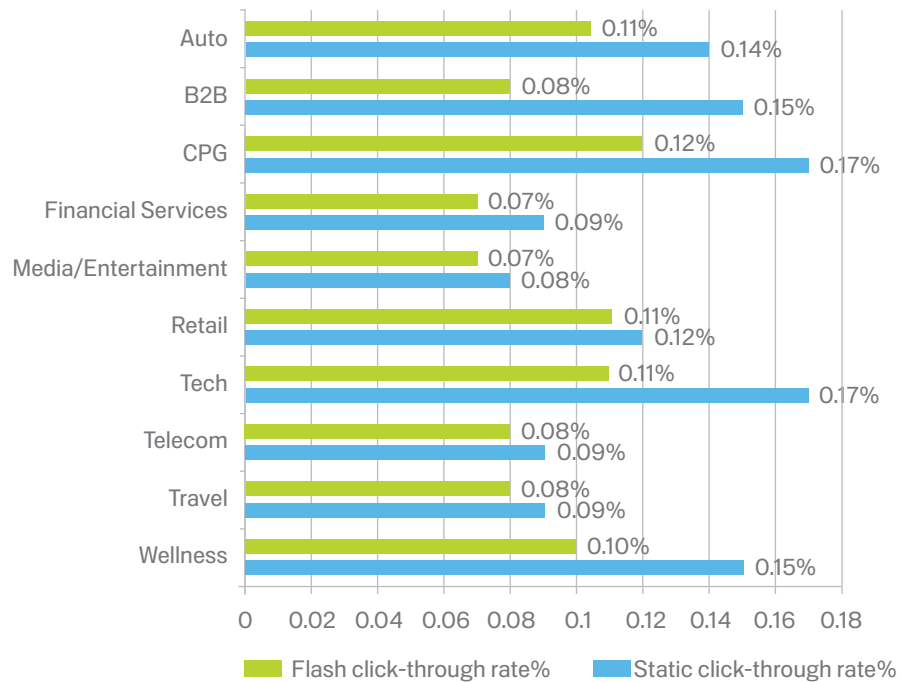
Static Ads	0.11%
Flash Ads	0.09%

Figure 1: Click-through Rate by Creative Sizes for Static Image and Flash Ads



Source: DoubleClick for Advertisers, EMEA advertisers, a cross section of major ad sizes only, January to December 2009

Figure 2: Click-Through Rate for Static Image and Flash Ads by Industry Vertical



Source: DoubleClick for Advertisers, EMEA advertisers, a cross section of major industry verticals only, January to December 2009

Rich Media Ad Benchmarks

- Preface: A Primer on Evaluating Rich Media Ad Metrics
- Overall Performance Norms
- Click-through Rate
- Interaction Rate and Expansion Rate
- Average Display Time, Interaction Time, and Expanding Time
- Video Complete Rate

Preface: A Primer on Evaluating Rich Media Ad Metrics

A rich media ad unit can inspire a range of responses from users — not every click in a rich media unit produces a click-through. When a viewer clicks on a rich media unit, a number of outcomes are possible, including expanding the unit, playing a video or otherwise interacting with the unit. The call-to-action for a viewer to click-through competes with all other possible forms of interaction within the unit. As a result, click-through rates can be lower for rich media than for other forms of online advertising where the click-through is the only form of user interaction.

The objective of rich media ads isn't always to drive clicks — they are often used to provide users with an experience within the ad itself. Therefore, engagement metrics such as interaction rates, interactions times, video completion, and expansions are important measures of the success of such ads. Also keep in mind that conversion activity can happen within the ad unit itself: A click could result in the user downloading a report from the ad unit, signing up for more information through a form on the ad unit, locating a product by postcode, or playing a video within the ad unit. Advertisers should consider the goals of the campaign at hand, and evaluate the performance of their campaigns based on the most relevant rich media ad metric.

Overall Rich Media Performance Norms

Creative Type	Click-through Rate (CTR)	Interaction Rate	Average Interaction Time	Expansion Rate	Video Complete Rate	Average Display Time	Average Expanding Time
Rich Media	0.11%	2.41%	9.31 secs	5.63%	51.08%	34.70 secs	6.07 secs

Key Observations

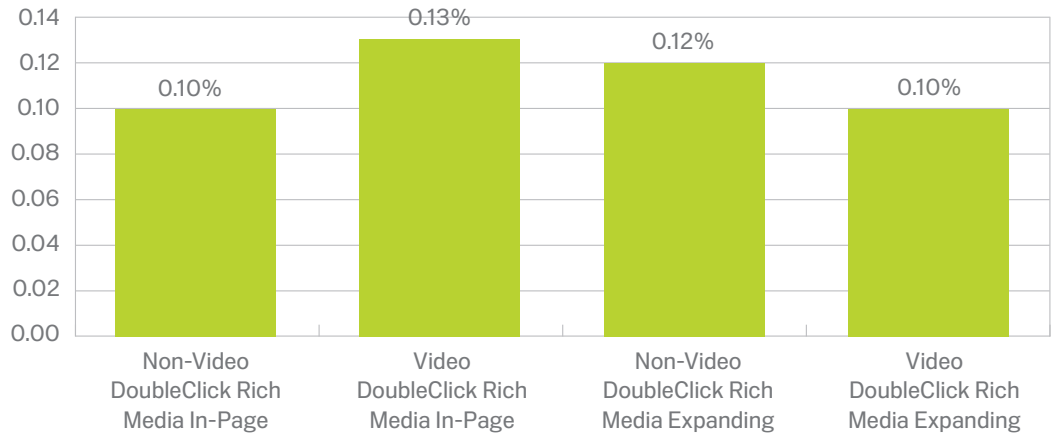
The highest click-through rates, interaction rates, for both video and non-video rich media formats, is achieved by large (336x280) in-page rectangles (see figures 4 and 7). For non-video this format has an interaction rate of 6.2%, and for video the large rectangles also have the highest median video complete rate at 59% (figure 17).

Format performance reflects the way rich media is used within campaigns, so for example expansion rates for rich media ads in telecom campaigns are relatively high at 7.3% while the click-through rates are the lowest observed (compare figures 10 and 11). A similar pattern appears for media and entertainment ads, and also for retail ads.

Expandable rich media appears to be a higher performing format in EMEA than the US ; in the US we see lower expansion rates (2.8% compared to 5.6% in the EMEA) as well as lower average expansion time (4.7 seconds compared to 6.1 seconds in EMEA).

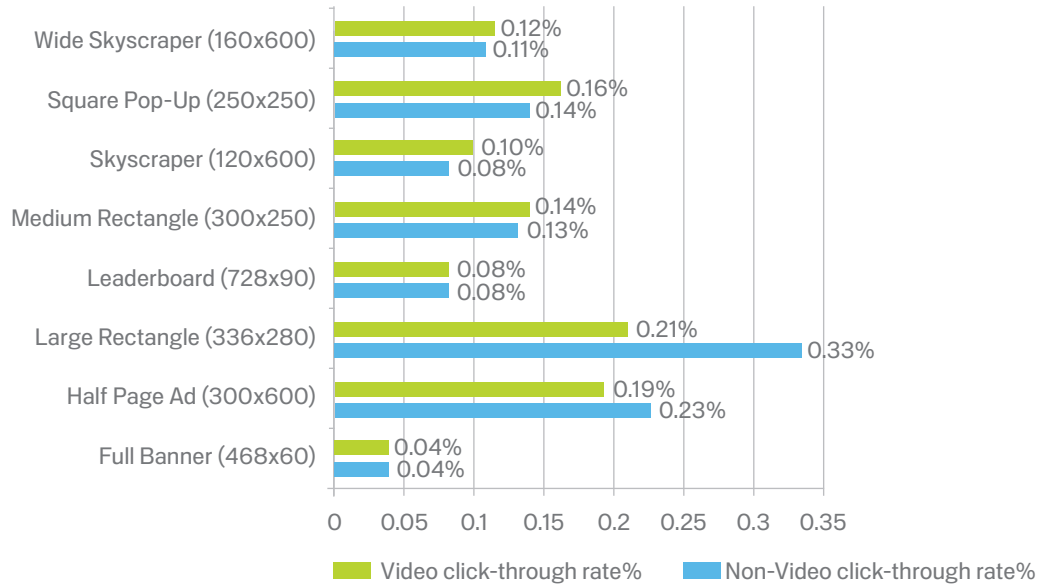
Click-through Rate by DoubleClick Rich Media Format

Figure 3: Click-through Rate by DoubleClick Rich Media Format



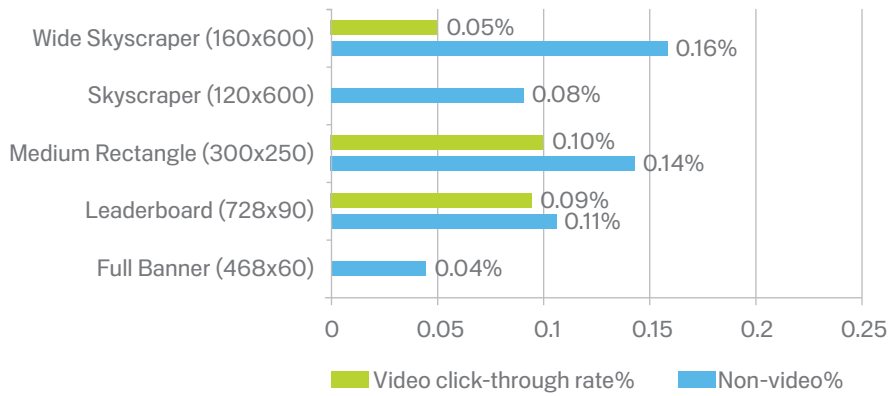
Click-through Rate by Creative Size for In-Page and Expanding DoubleClick Rich Media Formats

Figure 4: DoubleClick Rich Media In-Page Click-through Rate for Video and Non-Video



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media In-page format only, a cross section of standard ad sizes only, January - December 2009

Figure 5: DoubleClick Rich Media Expandable Click-through Rate for Video and Non-Video

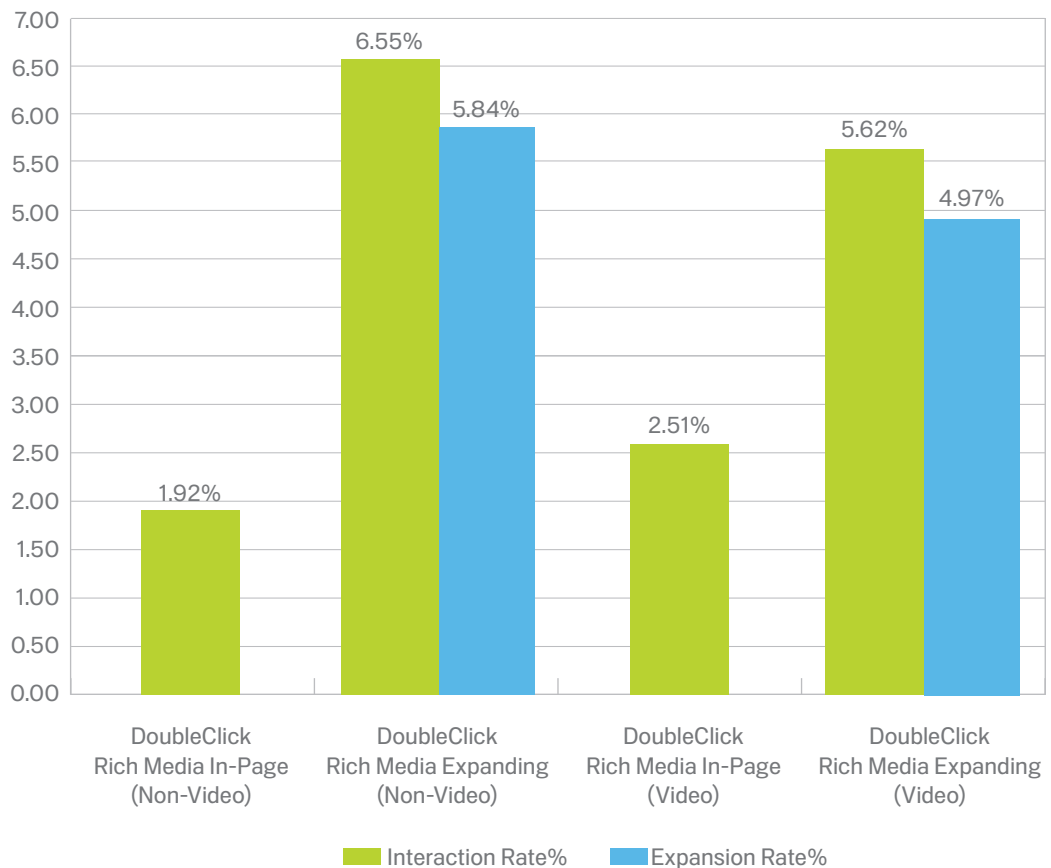


Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

Interaction and Expansion Rates

Non-video rich media expanding ads have both a higher expansion rate and a higher interaction rate compared to video ads and in-page non-video ads.

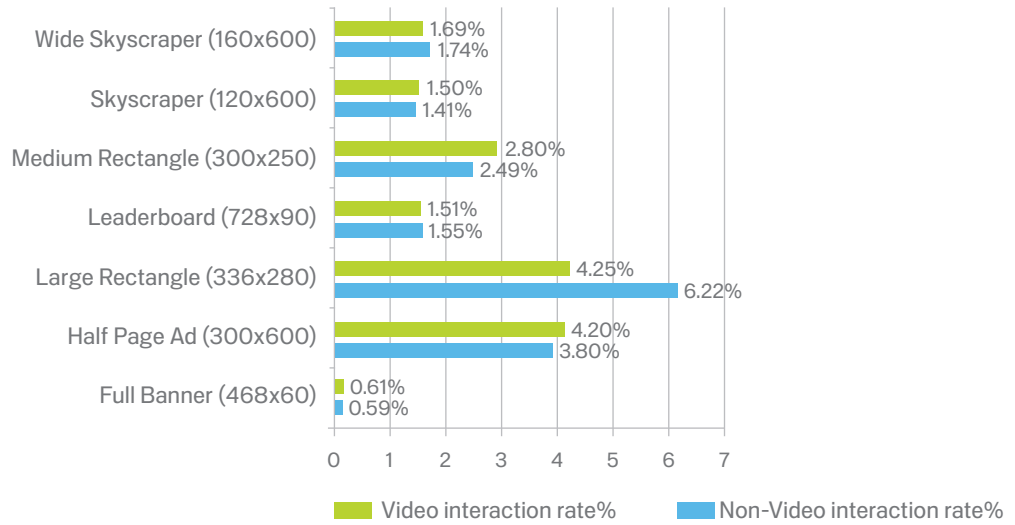
Figure 6: Interaction Rate and Expansion Rate by DoubleClick Rich Media Format



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media in page and expanding formats only, January - December 2009

Interaction Rate by Creative Size

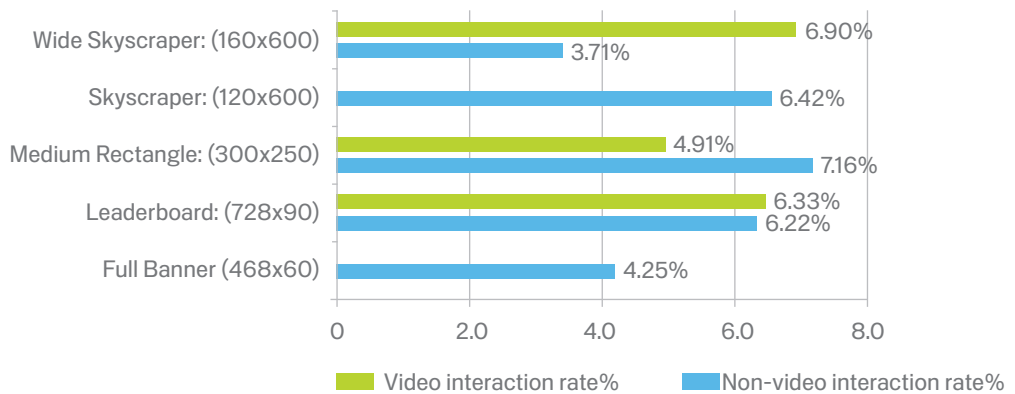
Figure 7: DoubleClick Rich Media In Page Interaction Rate for Video and Non-Video



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media in-page format only, a cross section of standard ad sizes only, January - December 2009

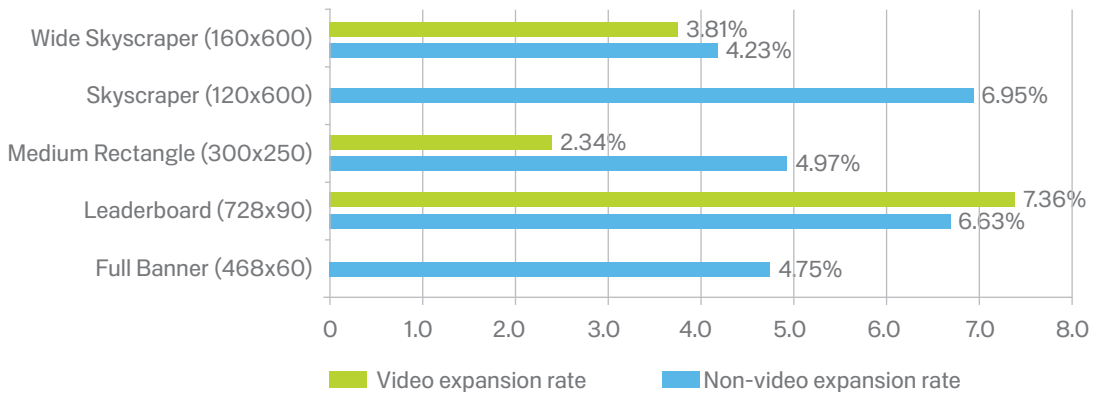
Interaction Rate and Expansion Rate by Creative Size

Figure 8: DoubleClick Rich Media Expandable Interaction Rate for Video and Non-Video



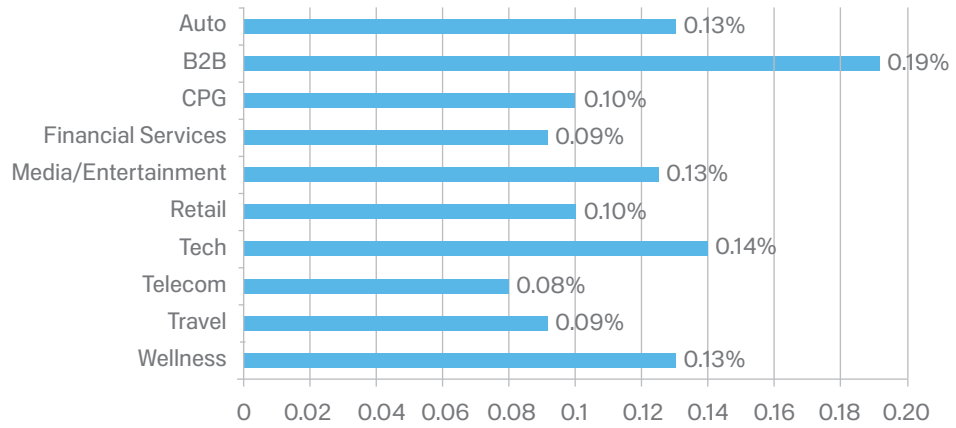
Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media in-page format only, a cross section of standard ad sizes only, January - December 2009

Figure 9: DoubleClick Rich Media Expandable Expansion Rate for Video and Non-Video



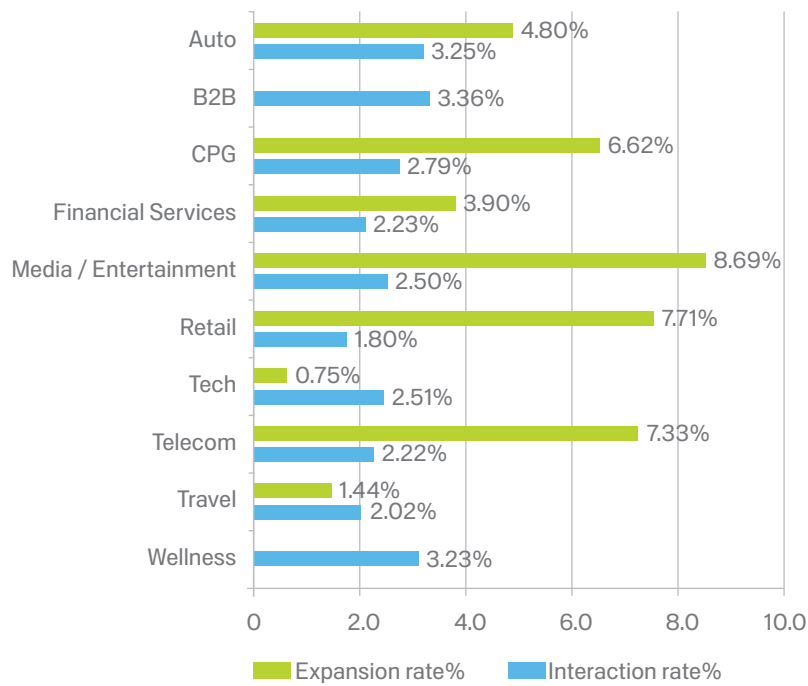
Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

Figure 10: Click-through Rate by Industry Vertical for DoubleClick Rich Media Format



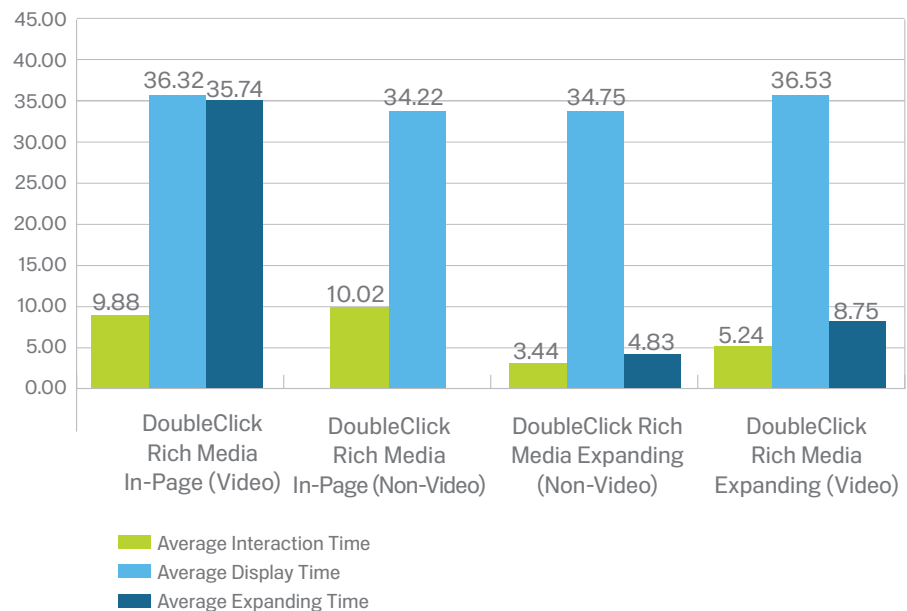
Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media formats only, a cross section of major industry verticals only, January - December 2009

Figure 11: Interaction Rate, and Expansion Rate by Industry Vertical for DoubleClick Rich Media Format



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media formats only, a cross section of major industry verticals only, January - December 2009

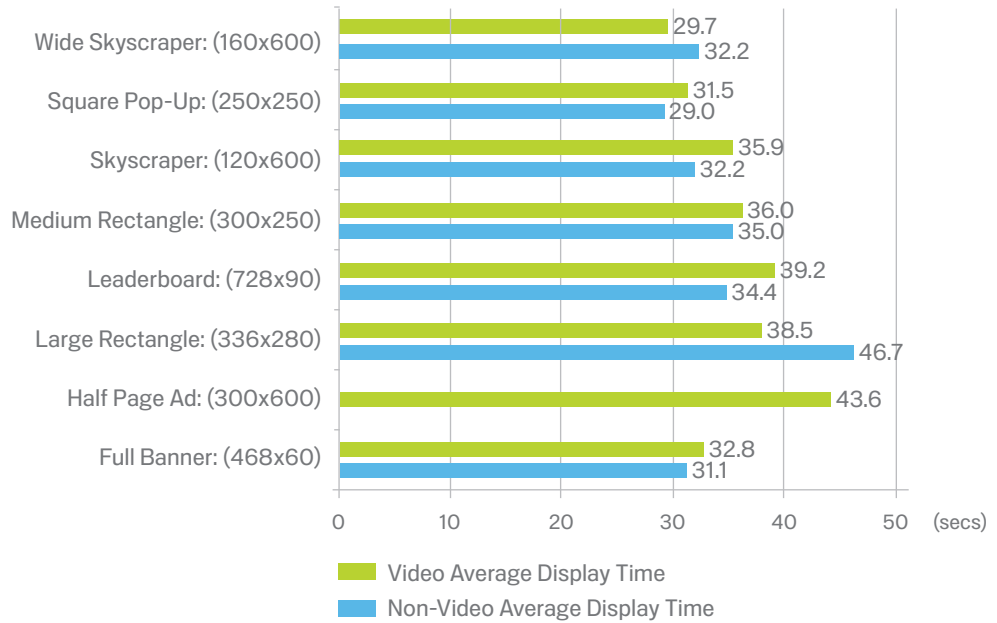
Figure 12: Average Display Time (secs), Interaction Time (secs), and Expanding Time (secs) by DoubleClick Rich Media Format



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

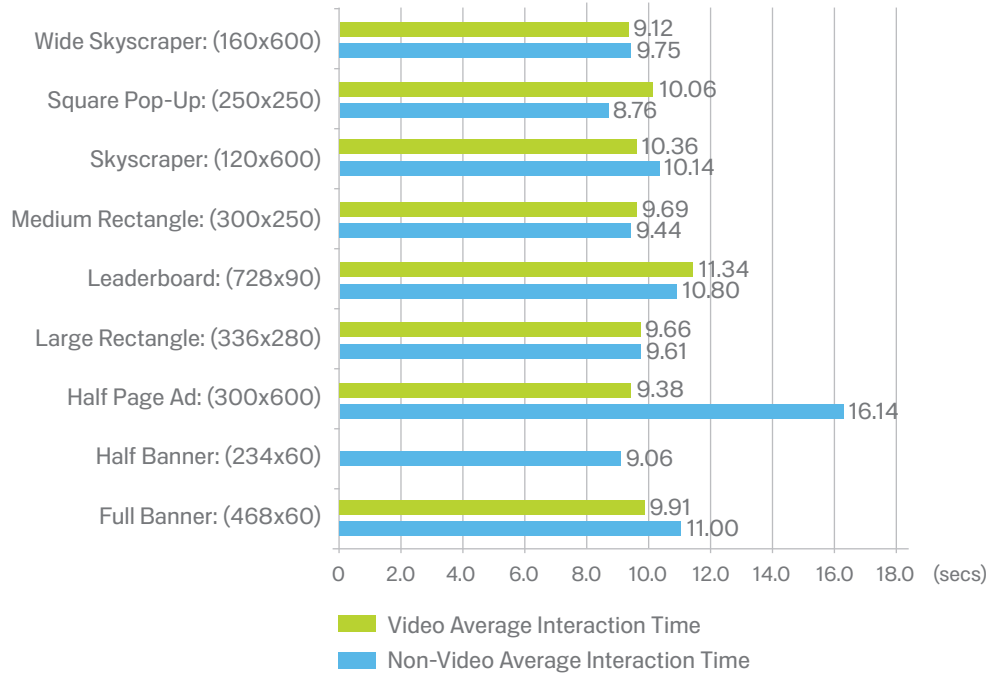
Average Display Time, Interaction Time, and Expanding Time by Creative Size and Rich Media Format

Figure 13: DoubleClick Rich Media In-Page Average Display Time (secs) for Video and Non-Video



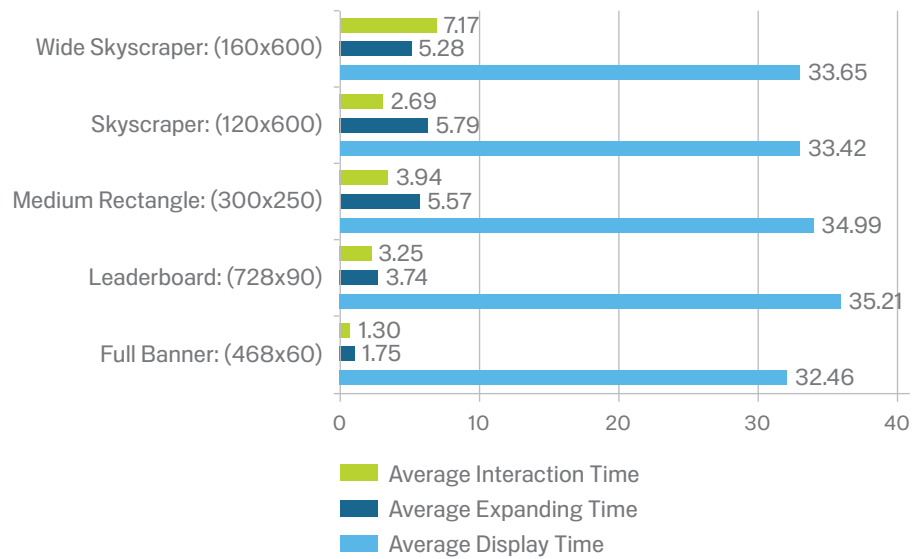
Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media in-page format only, a cross section of standard ad sizes only, January - December 2009

Figure 14: DoubleClick Rich Media In-Page Average Interaction Time (secs) for Video and Non-Video



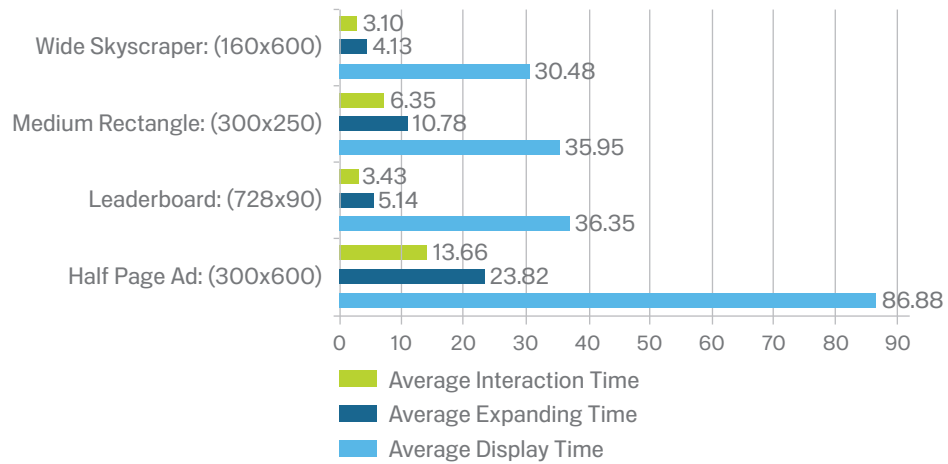
Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

Figure 15: DoubleClick Rich Media Expandable Non-Video
Average Display Time (secs), Expanding Time (secs), and Interaction Time (secs)



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

Figure 16: DoubleClick Rich Media Expandable Video
Average Display Time (secs), Expanding Time (secs), and Interaction Time (secs)

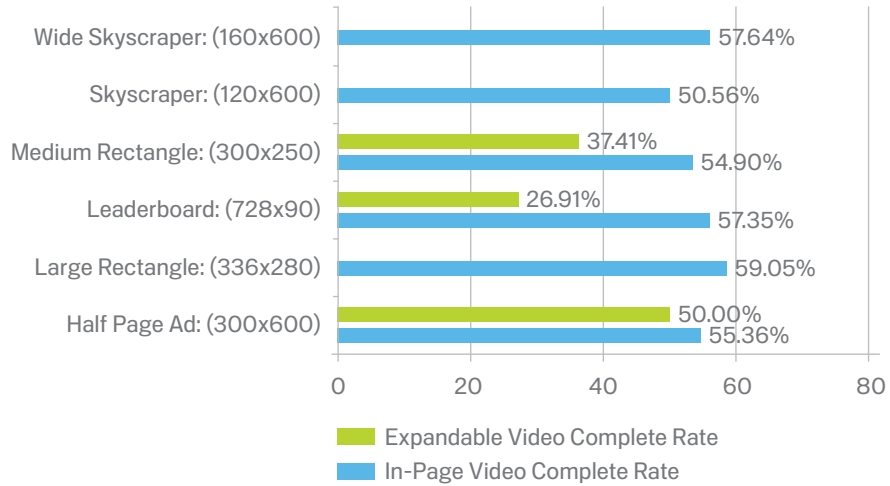


Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media expanding format only, a cross section of standard ad sizes only, January - December 2009

Video Complete Rate

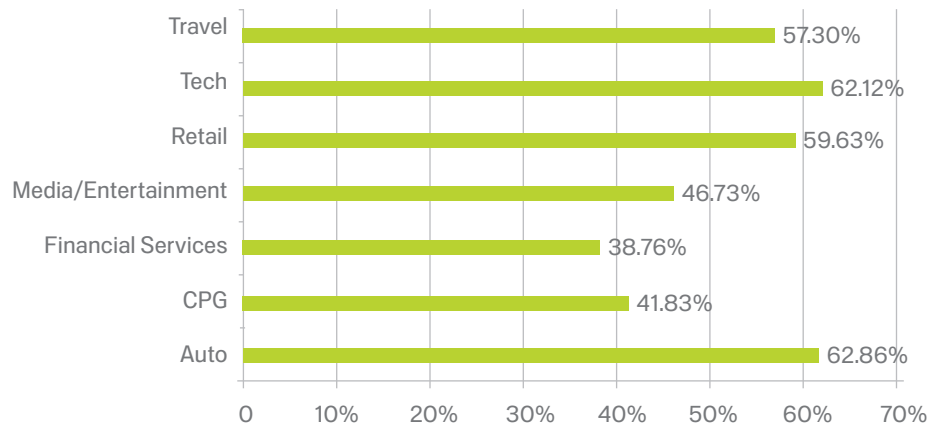
DoubleClick Rich Media Expanding	33.3 %	DoubleClick Rich Media In-Page	55.5 %
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Figure 17: Video Complete Rate for DoubleClick Rich Media In-Page (Video) and Expandable (Video) by Creative Size



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media in-page and expanding formats only, a cross section of standard ad sizes only, January - December 2009

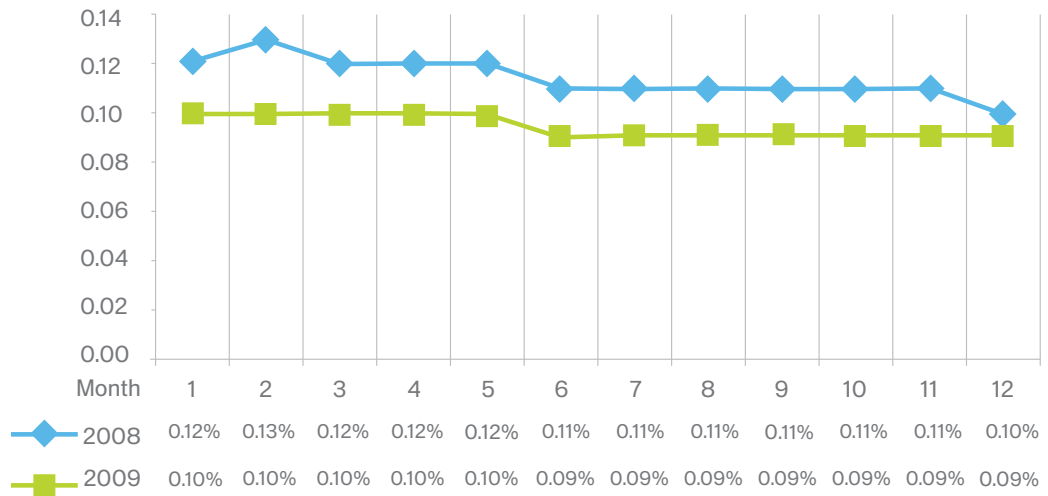
Figure 18: Video Complete Rate by Industry Vertical



Source: DoubleClick for Advertisers, EMEA advertisers, DoubleClick Rich Media video format only, a cross section of major verticals only, January - December 2009

Benchmark Trends Comparison 2008 vs. 2009

Figure 19: Overall Click-through Rates for 2008 and 2009 by Month



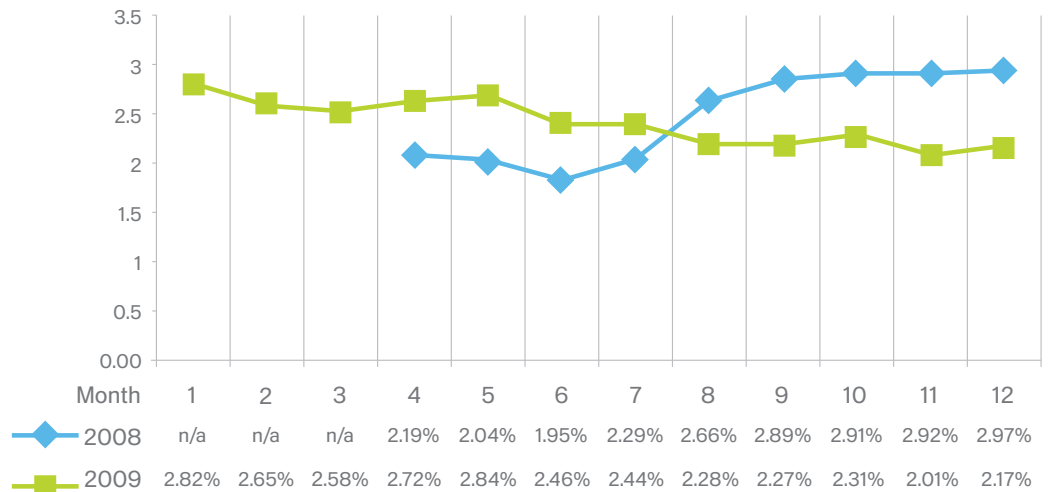
Source: DoubleClick for Advertisers campaigns, January 2008 – December 2009

Observations

Clearly the major observation is the reduction in click-through rates comparing 2009 and 2008, and occurring throughout the two year period, and in both years dropping in June.

Falling click-through rates can be partly explained by the continued growth in Flash and rich media. These formats are associated with lower click-through rates compared to static ads and offer interaction as an alternative mode of user engagement.

Figure 20: Overall Interaction Rates for 2008 and 2009 by Month



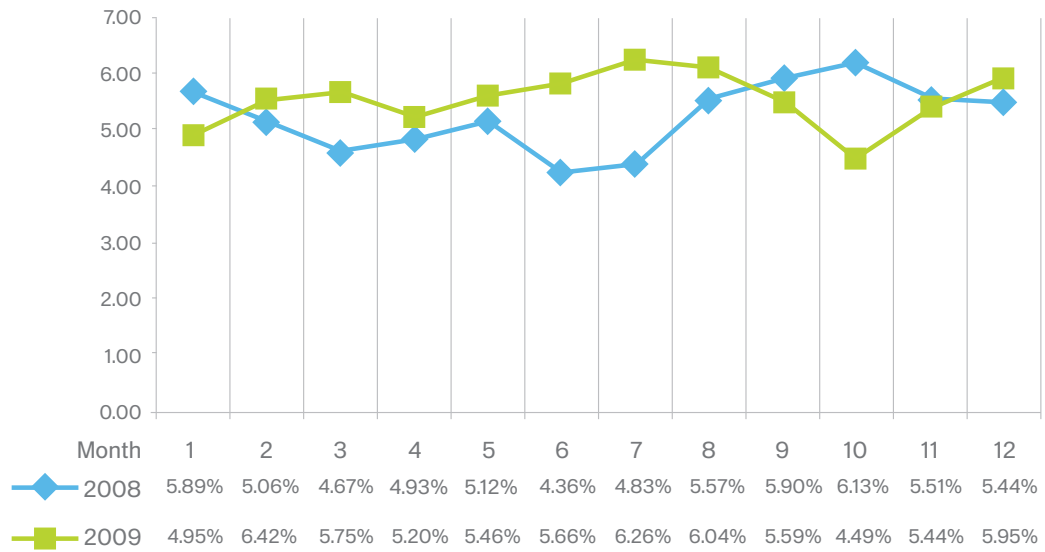
Source: DoubleClick for Advertisers campaigns, January 2008 – December 2009

Observations

Changes in interaction rates are more complex than click-through rates, rising towards the end of 2008 and then falling erratically through 2009.

By December 2009 the median interaction rate is almost identical to our first robust observation in April 2008.

Figure 21: Overall Expansion Rates for 2008 and 2009 by Month

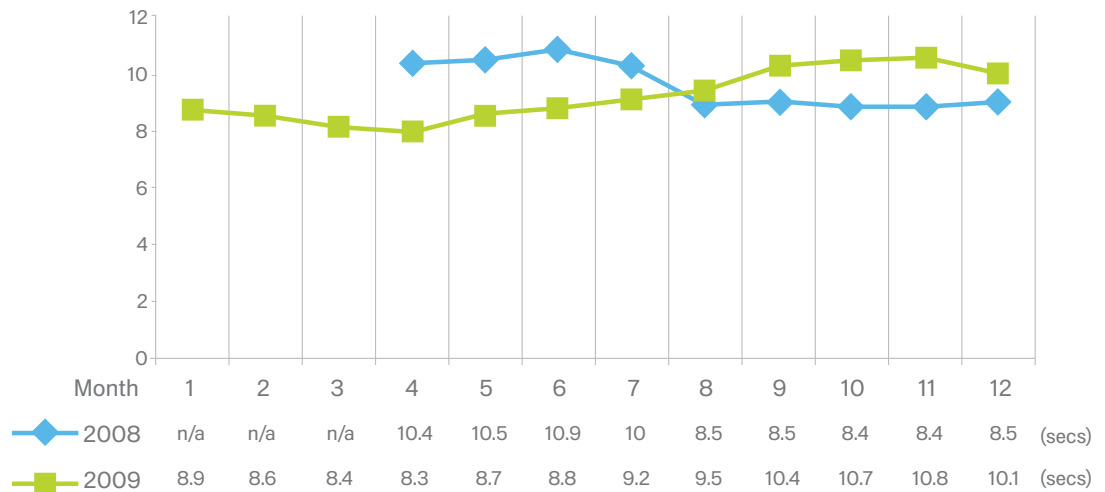


Source: DoubleClick for Advertisers campaigns, January 2008 – December 2009

Observations

Month by month expansion rates show no clear trend over the two year period, although it is notable that in 2009 from February through to August expansion rates were higher than in the same period in 2008.

Figure 22: Overall Interaction Time (secs) for 2008 and 2009 by Month



Source: DoubleClick for Advertisers campaigns, January 2008 – December 2009

Observations

Changes in interaction times appear to move inversely with interaction rates. So as interaction rates rose by around 0.5% from July-August 2008, interaction times fall by around 1.5 seconds, a change which persists through to the end of the year. Similarly over 2009 interaction rates tended to decline, while interaction time rose steadily until falling back in December.

Thus we observe that as users interact less with ads overall, those who continue to interact do so for slightly longer.

By the end of the period the observed median interaction time is very close to the first robust observation in 2008, at just over 10 seconds.

Worldwide Overall Performance Norms

Figure 23: Overall Worldwide Click-through Rates across Static Image, Flash and Rich Media Formats

Region	Overall Click-through Rate
North America	
Canada	0.09%
United States	0.10%
EMEA	
Austria	0.11%
Belgium	0.13%
Denmark	0.12%
Finland	0.05%
France	0.12%
Germany	0.11%
Greece	0.17%
Ireland	0.10%
Italy	0.10%
Luxembourg	0.09%
Netherlands	0.14%
Norway	0.11%
Spain	0.12%
Sweden	0.08%
Switzerland	0.12%
United Arab Emirates	0.18%
United Kingdom	0.07%
JAPAC	
Australia	0.07%
China	0.12%
Hong Kong	0.17%
India	0.18%
Malaysia	0.30%
Singapore	0.19%

Source: DoubleClick for Advertisers, a cross section of regions, January - December 2009

Figure 24: DoubleClick Rich Media Metrics Across a Cross-Section of Regions

Country	Interaction Rate (%)	Expansion Rate (%)	Video Complete Rate (%)	Average Interaction Time (secs)	Average Expanding Time	Average Display Time
North America						
Canada	5.3%	6.4%	66.9%	6.6	4.4	47.1
United States	2.5%	2.8%	50.0%	9.0	4.7	34.6
EMEA						
Belgium	2.7%	n/a	n/a	7.7	n/a	31.1
France	3.9%	7.4%	39.6%	7.1	5.6	27.6
Germany	2.9%	n/a	55.6%	8.6	n/a	33.3
Ireland	2.16%	6.4%	n/a	10.5	5.1	37.4
Italy	3.52%	7.1%	52.1%	7.5	6.8	36.1
Luxembourg	2.11%	5.9%	39.5%	9.1	7.5	32.6
Netherlands	4.49%	7.3%	n/a	7.5	5.8	34.9
United Kingdom	2.29%	5.1%	53.1%	9.6	5.8	35.2
JAPAC						
China	3.0%	n/a	n/a	7.1	n/a	15.5
Hong Kong	6.0%	10.9%	n/a	7.1	7.0	12.8
Singapore	7.9%	9.2%	17.4%	6.5	3.2	30.3

Source: DoubleClick for Advertisers, a cross section of regions with statistically significant rich media metrics, January - December 2009

Appendix

Appendix A: About the Source Data

DoubleClick has built a robust software tool to analyse online advertising campaign activity across its DART ad serving platform. Presently, the tool reports click-through rates, interaction rates, interaction times, expansion rates, expansion times and video complete rates for ads for thousands of advertisers using the DoubleClick for Advertisers (DFA) and DoubleClick Rich Media platforms. These data are carefully normalised to reflect industry norms to the best of our ability. The Advertising Research Foundation (ARF) was consulted on the design of this tool and advised on aspects of its methodological design, including the use of medians instead of mean averages for the calculation of the benchmark metrics noted above. Data shown here represent activity of a wide range of ad formats for DFA advertisers in the EMEA region unless otherwise indicated. The majority of data are from January to December 2009. The data on interaction rates and interaction times are from January to December 2009.

The dataset used for the DoubleClick benchmarks reports of the activity of thousands of DFA advertisers that have been categorised by industry and country geography. Industry categories are defined by the sub-categories they represent. To make category assignments, each DFA advertiser is assigned to a single industry sub-category. Subcategory assignments then roll-up into category assignments. For example, the Media and Entertainment industry category is a roll-up of advertiser data from seventeen subcategories, including Music, Movies, Sports, Arts and others. To ensure statistical soundness as well as client confidentiality, minimums have been applied to the data sets that can be reported on; at least four advertisers and four DART networks must be represented for any metric to be reported at any dimension of the data (e.g. by creative size, by time period).

Appendix B: Definition of Interaction Rate and Interactions

Interaction Rate: The ratio of DoubleClick Rich Media ad interactions to the number of rich media ad impressions displayed. This number is reached using the following calculation:

$$\text{Interactions} \div \text{Rich Media Impressions}$$

Interactions: The number of times users interacted with a DoubleClick Rich Media ad.

An interaction is uniquely counted only once per impression.

Interactions are captured when the user does one or more of the following:

- Mouses over the ad for 1 continuous second
- Clicks an Exit link
- Makes the ad display in Full Screen mode
- Expands the ad

Appendix C: Definition of Average Interaction Time

Average Interaction Time: The average amount of time, in seconds, that a user interacts with a DoubleClick Rich Media ad. Time from multiple interactions with an ad during a single ad view is aggregated.

Appendix D: Definition of Expansion Rate

Expansion Rate: Expansion rate is calculated by dividing expansions by DoubleClick Rich Media Expanding ad impressions.

Expansions are counted when a user expands the ad by either rolling over the ad or by clicking on it and the ad reaches its expanded state.

An expansion is counted only once per impression.

Appendix E: Definition of Average Expanding Time

Average Expanding Time: The average length of time, in seconds, that an expanding ad is viewed in its expanded state. Time from multiple expansions during a single ad view are aggregated. Timer starts when the ad reaches the expanded state and stops when it collapses.

Any expansion time that exceeds four minutes is capped. This extended expansion time can occur, for example, when a user opens an expanding ad on his or her browser, then steps away for an hour without collapsing the ad or closing the browser. The capping rule helps prevent skewed results.

Appendix F: Measuring Video Completes

The video complete rate is calculated by the following formula and definitions:

$$\text{Video Completes} \div \text{Video Plays}$$

Video Completes: The number of times a video played to its completion. For example, the number of times a 15-second video plays for its full 15 seconds.

Video Plays: The number of impressions where a video started to play.

About DoubleClick

Google's DoubleClick™ products provide ad management and ad serving solutions to companies that buy, create or sell online advertising. The world's top marketers, publishers, ad networks and agencies use DoubleClick products as the foundation for their online advertising businesses. With deep expertise in ad serving, media planning, search management, rich media, video and mobile, DoubleClick products help customers execute their digital media strategy more effectively.

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