



**DIGITAL
WORLD
2013**



Social media listening, mobile e online.

Un mondo digitale a disposizione del marketing strategico

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AD - AlFemminile.com e Presidente I.A.B. Italia

Digital scenario: utenza e investimenti in movimento

La rete è dinamica



E-GOVERNMENT



BIGDATA



PHOTO
SHARING



HEALTHCARE



MOBILE



STARTUP



SOCIAL



TV E
INTERNET



INTERNET
OF
THINGS



GAMES



GEOREFERENCE



ECOMMERCE



Value of the European online ad market 2012

€24.3bn



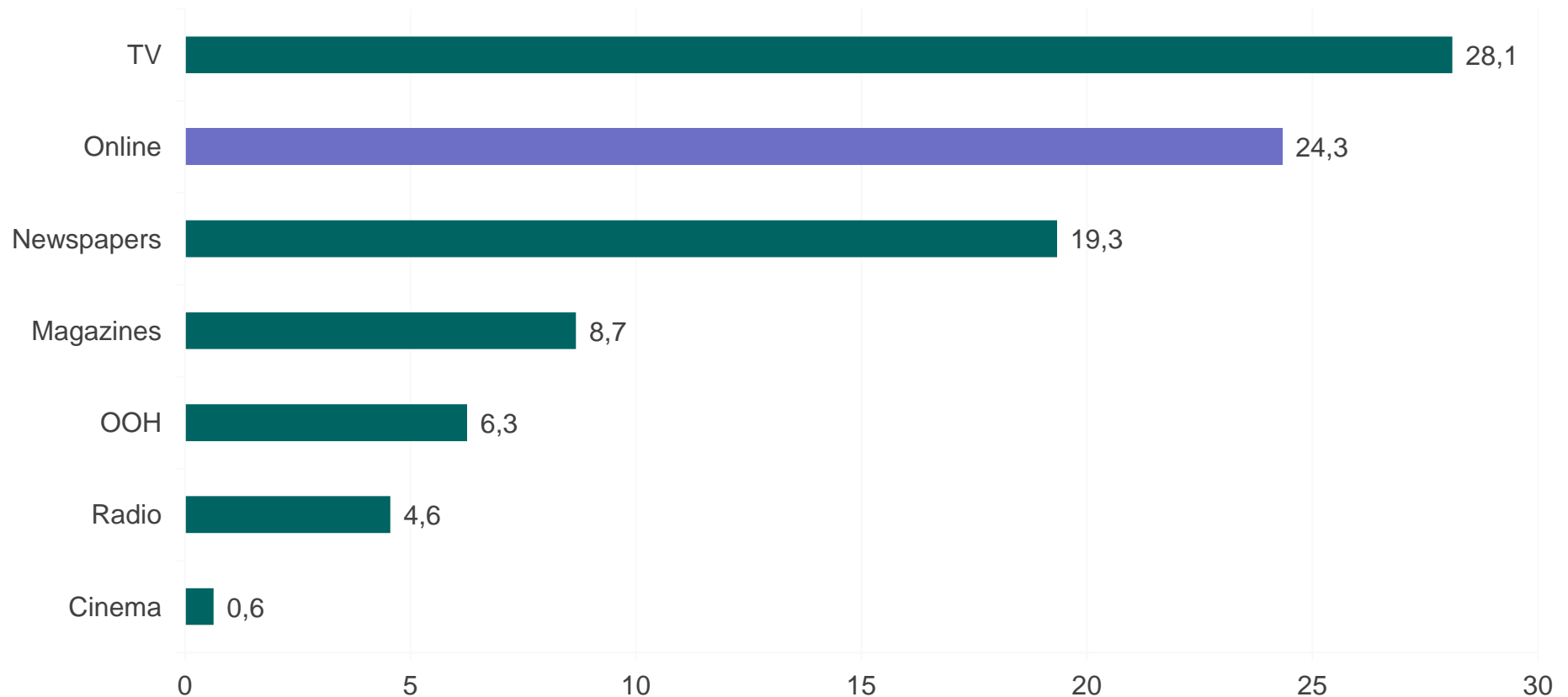
#INTERACT13

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Online for the first time overtakes print newspaper ad spend & becomes 2nd biggest media category in Europe

2012: European advertising market share by medium



Note: Source for non-online ad revenue is IHS. Print ad spend excludes direct mail.

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Source: IAB Europe & IHS Electronics & Media

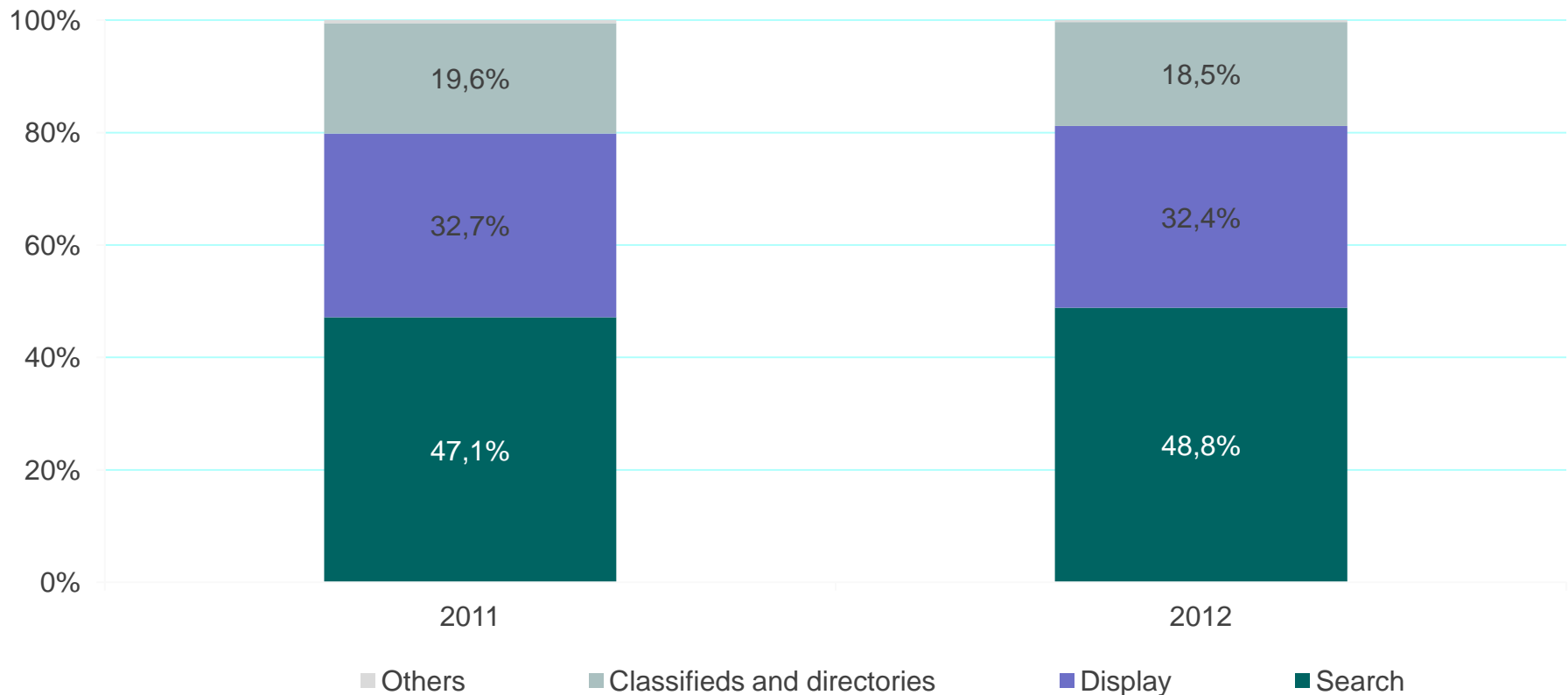
What is driving growth?

- Both emerging markets growing from low basis and established markets that demonstrate sustainability of online ad momentum
- Video
- Mobile
- RTB has the potential to be a driver
- Social networking sites
- Europeanisation and consolidation of classifieds & directories
- Localisation & individualisation of search, mobile search

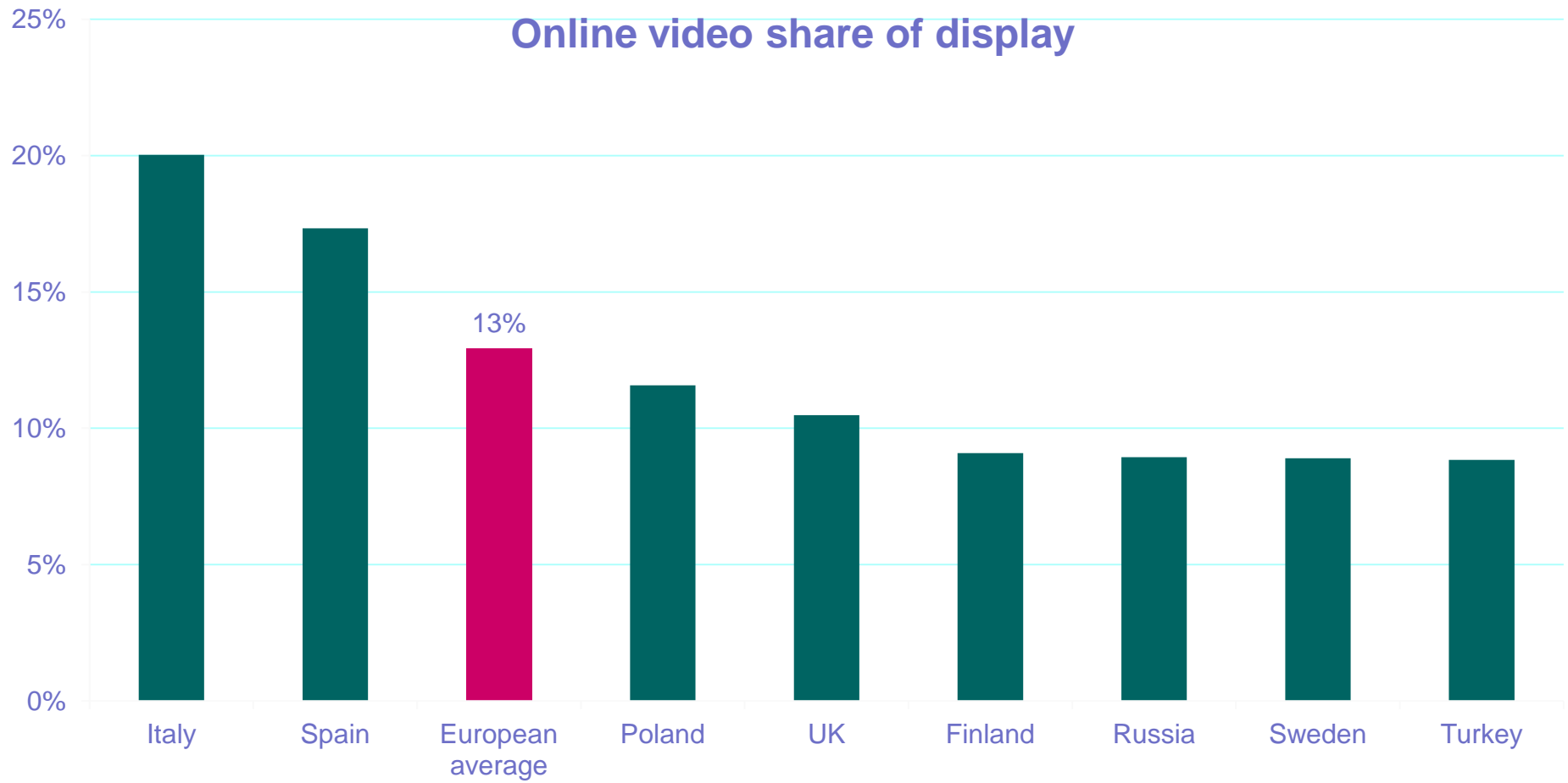


Search remains strongest segment in 2012

Format shares of online



Online video is now 13% of all online display...



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Investimenti Italia 2012?



- 14,5%

TOTALE INVESTIMENTI

FONTE NIELSEN



+5,3%

INTERNET

FONTE NIELSEN



Stima investimenti internet Italia 2013



+7/8%



INTERNET

FORNITORE IAB ITALIA



Internet audience (individui 2+)

28,9 MILIONI NEL MESE
IL 52,6% DELLA POPOLAZIONE ITALIANA 2+

14,3 NEL GIORNO MEDIO

UTENTI ATTIVI NEL GIORNO MEDIO DETTAGLIO AREA GEOGRAFICA



26,8%
NORD-OVEST

14,5%
NORD-EST

16,8%
CENTRO

30,4%
SUD E ISOLE

11,5%
N.D.

45%
6,5 MILIONI
DI DONNE

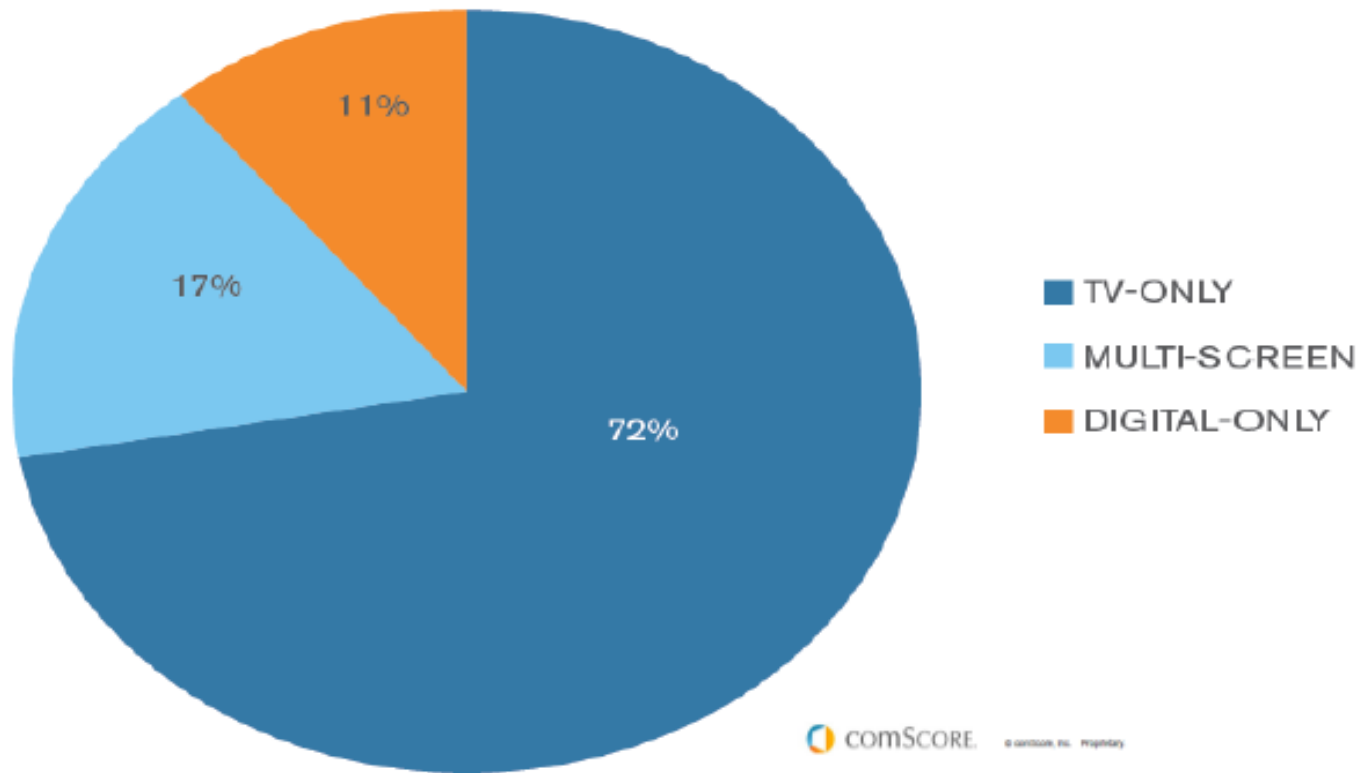


55%
7,8 MILIONI
DI UOMINI



Gli utenti si evolvono e cresce il multi screen

Figure 2 % Reach During 5-Week Study Period
Average Across 10 Broadcast and Cable Networks/Network Groups



In Italia il 41% degli utenti accede a Internet da più di un device (EU 37%)

PC utilizzato da 28.9 milioni di italiani (55%
- EU:64%)



Smart phone utilizzato da 10,5 milioni di italiani (20%
- EU:21%)



Tablet utilizzato da 5,6 milioni di italiani (11% - EU:8%)



Games console utilizzato da 4,4 milioni di italiani (8%
- EU:6%)



Utilizzo combinato TV e internet



60%

EU: 73%
WE: 67%
NE: 81%
SE: 65%
CEE: 81%

Degli utenti italiani di Internet guarda la TV on line

5% guardano la TV on line giornalmente
Un altro 20% guarda la TV online almeno una volta la settimana



Sulla base dell'utilizzo mensile, la proporzione degli utenti Internet che guarda la TV online è sopra il **19%** rispetto al 2010

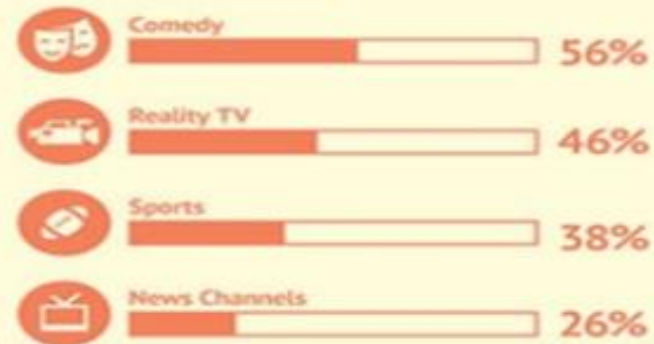
Social TV trends

WHAT GETS SOCIAL TV BUZZING

People use social media while watching TV to connect with other viewers. According to a survey by The Hollywood Reporter, comedies and reality TV light up social sites.

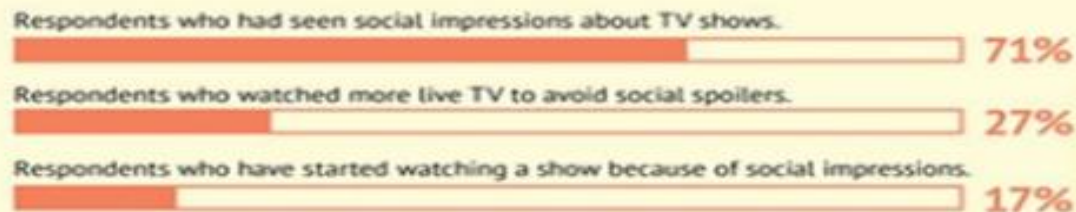


TYPES OF SHOWS SOCIAL MEDIA USERS ARE LIKELY TO POST ABOUT WHILE WATCHING:

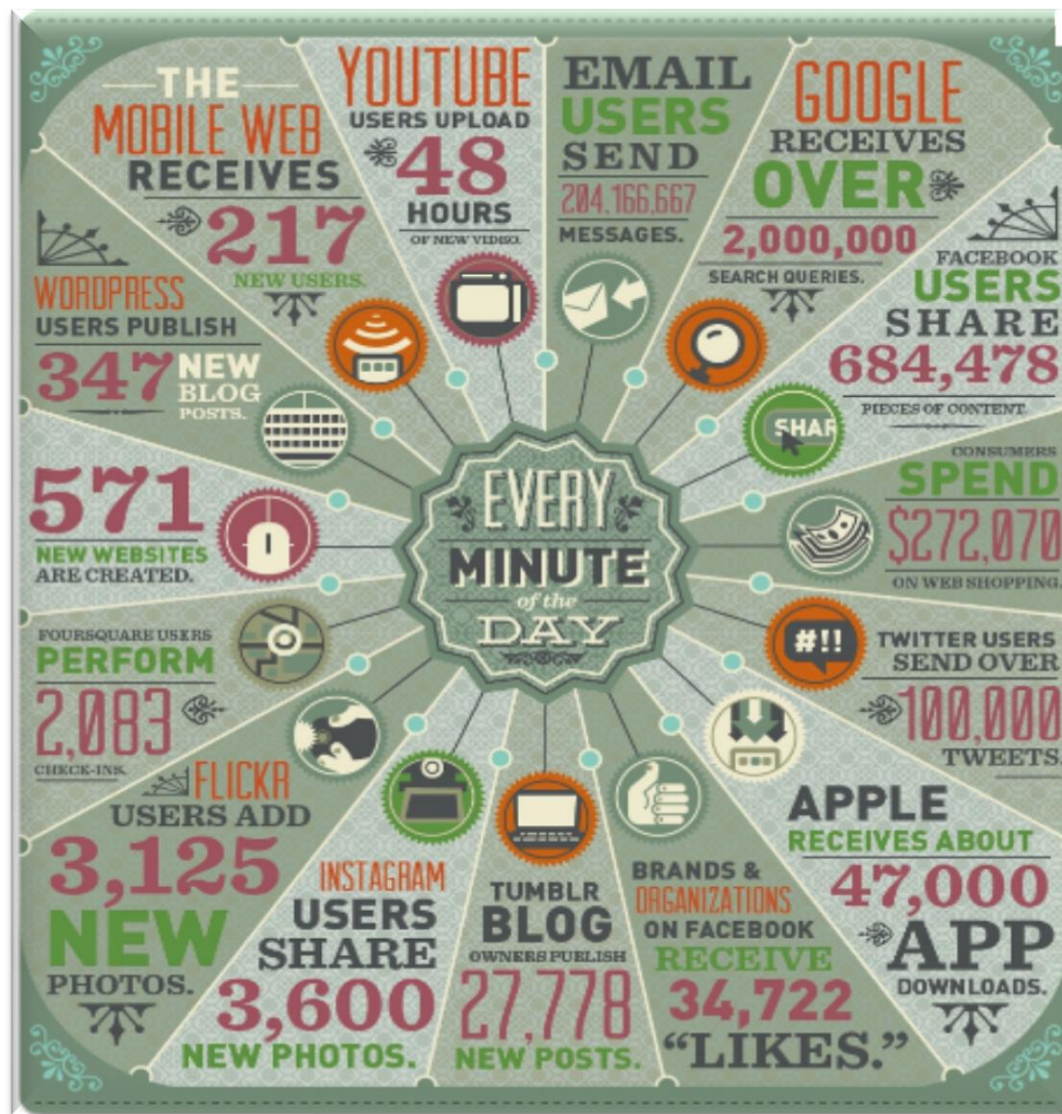


SOCIAL MEDIA CHANGING TV VIEWING HABITS

This rise in social media discussions around TV is now changing traditional viewer habits, suggests a survey by TV Guide.



Tutte le entità internet raccolgono dati





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Grazie per l'attenzione!

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