

The Global Advertising Industry: the market

Market Analysis – 2017-2020 Trends – Corporate Strategies

Publication date: December 2016

Exclusive extracts from this 111-page-long report:

- What is the business?

Advertising includes a wide array of activities within the media and communication industry. While the core business remains the conception, production and distribution of advertising campaigns, other services traditionally provided by advertising agencies include advertising space brokerage, marketing, PR, and related services. Over the past years, increasingly sophisticated Internet technologies have fostered the industry's digital transition, with advertisers shifting ever larger shares of their ad budgets from traditional mass-media to digital/online media. [...]

- What are the main markets?

While North America and Europe still account for the largest proportion of leading advertising agencies' turnover, the share of emerging markets has been slowly increasing over the past decade. Advertising groups have stepped up investments in emerging markets, where economic growth and favourable societal dynamics (growing population, increased wealth and middle-class size) are set to provide the base for more robust industry growth than in mature economies. [...]

- Who are the key players?

The industry is characterised by a great number of players that vary in terms of diversification, degree of vertical integration and geographical reach. Mergers and acquisitions are commonplace, but the industry remains fragmented, with a great number of small, specialised niche agencies or ad technology providers. Most of the companies analysed in this report are fully integrated and diversified. [...]

- How intense is competition?

The degree of rivalry in the advertising industry is high, with leading traditional advertising agencies not only competing with each other for skilled employees and major customers, but also with Internet companies with an advertising-based business model in the online advertising space, which has become the market's main driver of growth. Moreover, according to market segment (print and broadcast media vs. online/digital media) or product (ad campaign, consumer data, PR, brand consulting, etc.), advertising companies face competition from more specialised agencies or marketing service providers. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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Analyst, Xerfi Global

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