



# **China Online Advertising Industry Report, 2010-2011**

**Mar. 2011**

## ***This report***

- ◆ **Analyzes the status quo and development trends of China's internet advertising market in 2010.**
- ◆ **Focuses on the market segments of China's online advertising, such as integrated portal, search and guide website, video website, and vertical portal.**
- ◆ **Highlights the operation and development of key enterprises in China's online advertising market.**

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## Abstract

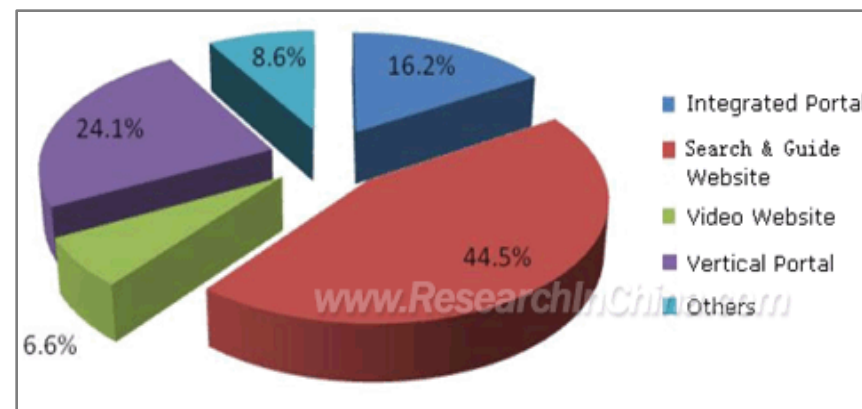
In 2010, China's Online advertising market continued to maintain high-speed growth, and the market size increased substantially by 58.7% year on year to RMB 32.7 billion.

China's Online advertising market consists of segments including integrated portal, search and guide website, video website, and vertical portal. Search and guide websites refer to the large websites such as Baidu, Google, Taobao, and Qihoo 360 that lead users to small and medium-sized websites.

In China's online advertising market in 2010, integrated portals accounted for 16.2% of the advertising income, a decrease compared with the 22.9% in 2009; search and guide websites delivered an excellent performance, and video websites expanded their share slightly.

Being more rational, advertisers are pursuing more accurate delivery and maximization of advertising effect. In the future, the advertising income of integrated portals will be further reduced, while the advertising business of search and guide websites and vertical portals will maintain high growth potential.

**China's Online Advertising Market Segments, 2010**



Source: ResearchInChina

In 2010, China's online advertising market was still highly concentrated, with top 14 Internet media accounting for 68% of the advertising income. Baidu, Taobao and Google China were the top three Internet enterprises in terms of advertising income.

Baidu achieved advertising income of RMB7.9 billion, occupying 24% market share; benefiting from the substantial increase in its platform turnover, Taobao achieved advertising income of RMB3.9 billion, promoting its market share from the third place in 2009 to the second place.

Impacted by the withdrawal from China, Google China saw decelerated advertising revenue growth and its market share drop from the second place in 2009 to the third place.

In the future, search and guide websites will still be the major players in China's Internet advertising market. Baidu and Taobao will further consolidate their market leadership, sitting tight in the top rank. Relying on their brand value, integrated portals will still maintain some advantages, large user group, for instance, and remain in the second rank despite the intense competition in the advertising business.

Video websites and vertical portals like Youku, Bitauto and Soufun constitute the third rank and will be active members in the future online advertising market. The competition among them will be increasingly tense.

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