

**April 2009**

# Overview of Advertising Spends in Europe Sector: Tourism Year 2008

**Nielsen ad Relevance Report  
By Katia Risse**

**30<sup>th</sup> of April 2009,**

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This report is an example of what Eficiens can do with Nielsen's tools. Most interesting results concern advertising activity in countries you are targeting in your campaigns, advertising spending estimated figures of your main competitors or of top advertisers in your sector and the presentation of your competitor's campaign visuals and online placement strategies.

If you are interested in receiving regular Nielsen reports including our own analysis of the sector, please contact Mr. Francis Mahut for more information about personalized reports' contents and prices.

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### **Aims & methodology**

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This report aims at showing main advertising trends in Europe in 2008 for the Tourism sector. This includes: repartition of advertising spends between European countries, advertising activity across the year, segmentation of the tourism sector and analysis of advertising activity of key advertisers per segments.

The report is based on Nielsen Ad Relevance figures and includes data processing as well as Eficiens analysis. Please note that only display campaigns are taking into account, which means that search campaigns are ignored. The proportion of search marketing in brand's online marketing strategies depends on the activity sector, country and the advertiser's objectives and strategy. For instance, in 2007, Search Engine Marketing represented 57% of the total online marketing budgets in the UK, 45% in Germany and 40% in France. This ratio reached an average of 46% for all European countries in 2008 and SEM rose faster than display marketing in most countries.

## Executive Summary

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Altogether, 2008 has been more active online for the tourism sector than previously. Through a few major evolutions have to be highlighted:

- Lower budget spent overall for more campaigns
- Multiplication of advertisers across all categories

They were no notable evolutions concerning geographical budgets repartitions or

*Please note that "Tourist Boards" category was not included in 2007 report.*

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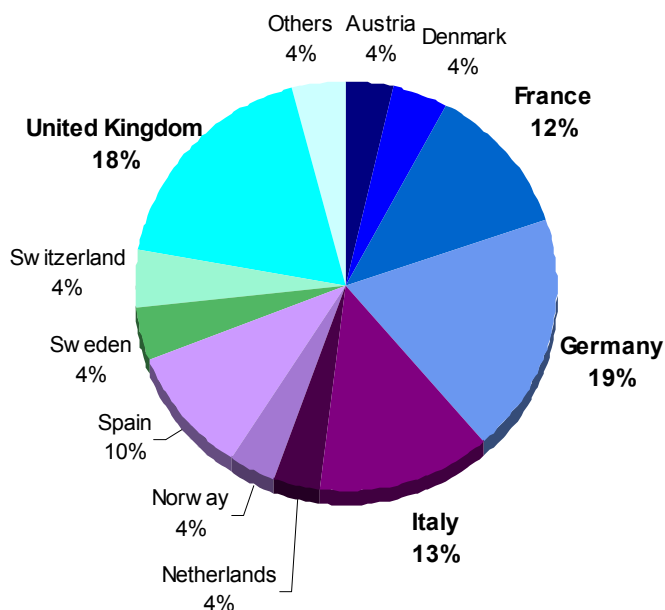
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**I. Executive summary of the year 2008: key facts, comments & analysis**

The advertising activity of Travel/Tourism sector in Europe in 2008

Country	Campaigns	Budgets € (000)	Impressions (000)
Austria	1347	9 341	2 335 279
Belgium	813	4 098	819 486
Denmark	1 463	16 060	3 212 044
France	4 410	103 670	20 734 234
Germany	6 906	174 191	34 837 979
Italy	4 811	23 070	5 767 225
Luxembourg	66	na	na
Netherlands	1 336	12 902	2 580 318
Norway	1 377	116 878	29 219 599
Portugal	329	na	na
Spain	3 666	21 323	4 264 502
Sweden	1 514	46 987	11 746 994
Switzerland	1 625	8 955	1 279 266
Turkey	295	na	4 451 134
United Kingdom	6 579	100 875	6 090 665
<b>Total</b>	<b>36 537</b>	<b>638 350</b>	<b>127 338 725</b>

In 2008, more than 36 500 campaigns were launched online in the tourism sector. This represented a total budget of more than 630 million € and almost 128 billion impressions. This was more than last year as campaigns increased by 26%, budgets by 5% and impressions by 7%, but less if we take into account the fact that this sector included an additional sub-sector compared to 2007 (Tourist Boards).



The advertisers' preferred countries in Europe were Germany (which totalised more than 19% of European campaigns), the United Kingdom (18% of European campaigns), Italy (13%), France (12%) and Spain (10%). This repartition is almost similar to last year's.

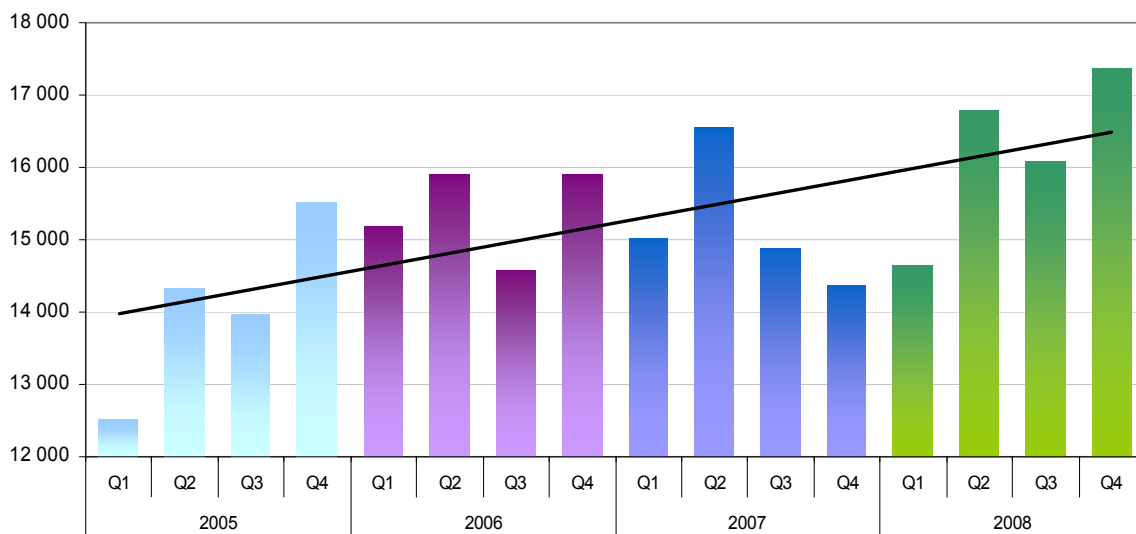
In terms of budgets spent, Germany reached the top position with 27% of ad spends in Europe, followed by Norway with 18%, France and the UK with 16% each. Thus if countries as Italy and Spain totalised a huge amount of campaigns, budgets allocated were lower than in other countries. This is comparable to last year repartition.

These trends show the influence of population, internet penetration rates and media purchase pricing practices between countries on advertising spending. Indeed, Germany, the UK, Italy and France are countries which count the highest numbers of internet users in Europe. Other less populated countries such as Norway, Denmark or Sweden count fewer internet users but register a higher internet penetration rate. Moreover, in countries of "the old Europe" and especially the UK, France and Germany, media purchase costs more than in others, which also explains the importance of ad spends in the former.

Evolutions of the advertising activity of Tourism sector

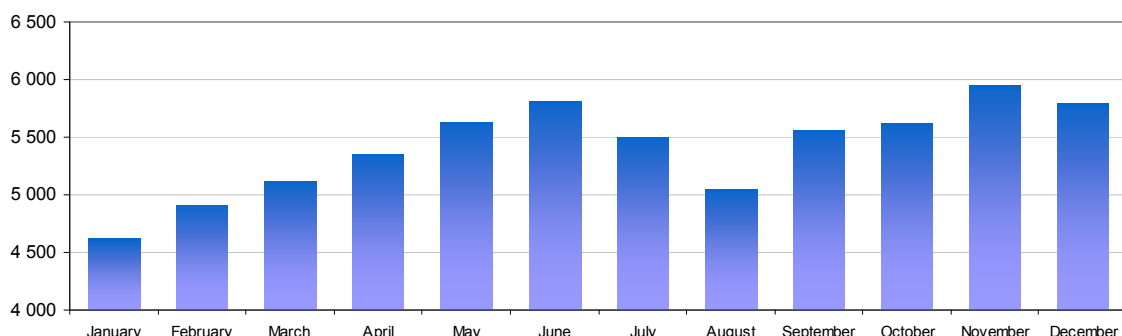
The short term trend in tourism advertising is the increasing number of campaigns, as illustrated by graphics below.

**Evolution of advertising activity by number of campaigns between 2005 and 2008**



If we compare 2008 figures with 2007 ones, the number of campaigns in Europe increased by 26% and budgets spent by 5%. Investments increased in Belgium (+41%), Denmark (+34%), Germany (+14%), Norway (+26%), Spain (+1%), Sweden (+45%) and Switzerland (+34%). It decreased in Austria (-29%), France (-4%), Italy (-20%), the Netherlands (-31%) and the United Kingdom (-16%).

**Repartition of 2008 advertising activity by number of campaigns by month**



Tourism sector seems to follow a seasonal trend where activity peaks happen before annual vacations periods. However, the 2nd half of 2008 counted more campaigns than the 1st half.

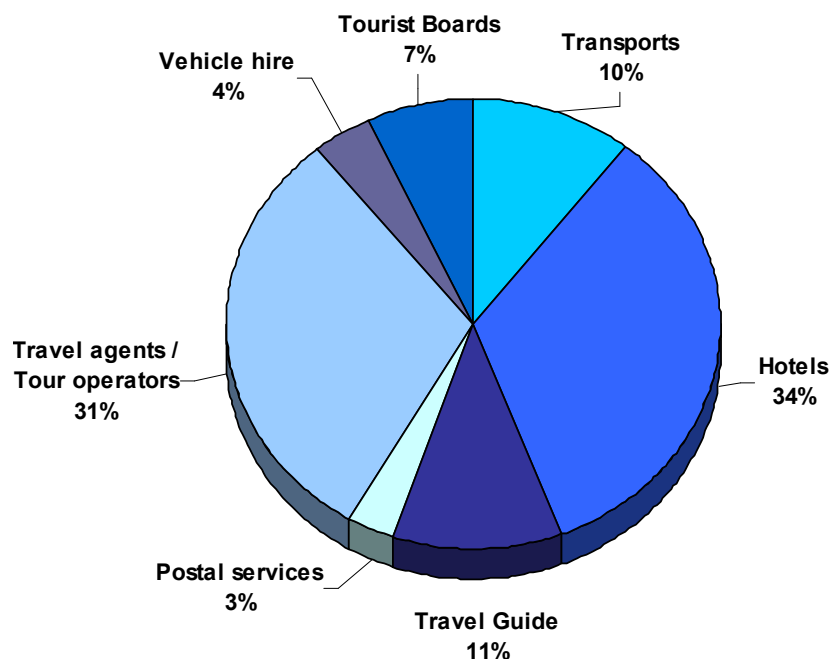
Next part of the report explains segmentation of the tourism sector by Nielsen and goes deeper into the advertising activity of main advertisers.

## II. Segmentation of the Advertising Tourism sector in Europe

In 2008, the tourism sector gathered 2355 active advertisers (instead of 1823 last year thus 29% more) from international companies to local services providers. However a large part of them only spent small amounts online. Consequently, high budgets are concentrated on a small numbers of actors.

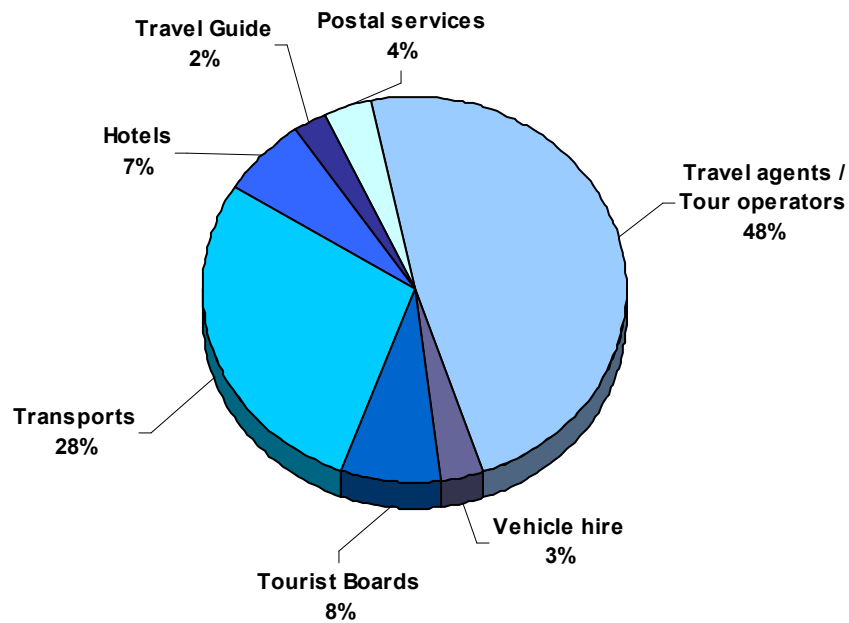
The Tourism sector in Europe is segmented by Nielsen in 7 categories:  
**Hotels, Postal services, Transports, Travel Agents, Travel guide, Vehicle Hire and Tourist boards.**

Segmentation of the tourism sector by number of advertisers



- ◆ The category "Hotels" gathers worldwide implanted hotels chains, famous and luxury Hotels located in capitals but also small local hotels or Bed and Breakfasts.
- ◆ The category "Postal Services" regroups national postal services such as Swiss Post, La Poste or Posten Norway and private companies offering delivery services worldwide or locally.
- ◆ The category "Transports" contains any kind of transporters: trains, planes, taxis, buses, sea travel ...
- ◆ The category "Travel agent" encompasses specialized and large-scale travel agents and tour operators, from local ones to worldwide chains.
- ◆ The category "Travel guide" includes physical guides companies, firms editing travel books or travel maps, websites dealing with tourist information.
- ◆ The category "Vehicle Hire" gathers worldwide and local car rental companies.
- ◆ The category "Tourist boards" regroups national and local representations of a particular destination.

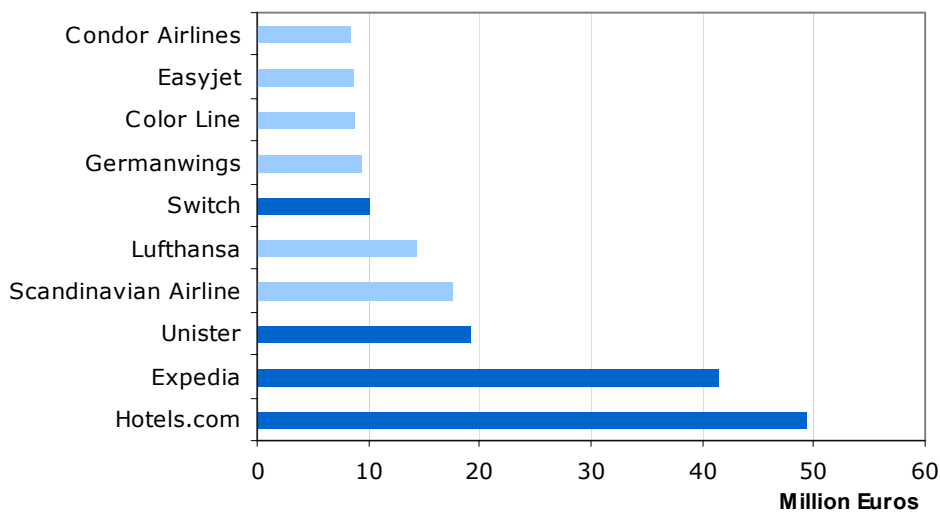
Segmentation of the tourism sector by online marketing spending in 2008



Concerning budgets spent, 2008 online tourism European advertisement was dominated by "travel agents and tour operators" ads (48% of total budget) while they represented only 31% of the tourism sector advertisers. Other important sub-sector was "transports" which invested 28% of the total budget, whilst accounting for only 10% of the tourism sector advertisers. The new category "tourist boards" already represented 8% of the sector spending (and 7% of the sector advertisers). The category "hotels", which represented 34% of the total amount of tourism sector advertisers, represented only 7 % of the sector spends. Finally, the categories "postal services", "vehicle hire" and "travel guide" represented a small amount of the total sector spending.

Advertisers, which spent the most in 2008, were all travel agents or transporters, as in 2007.

**European Top Ten advertisers for the tourism sector**

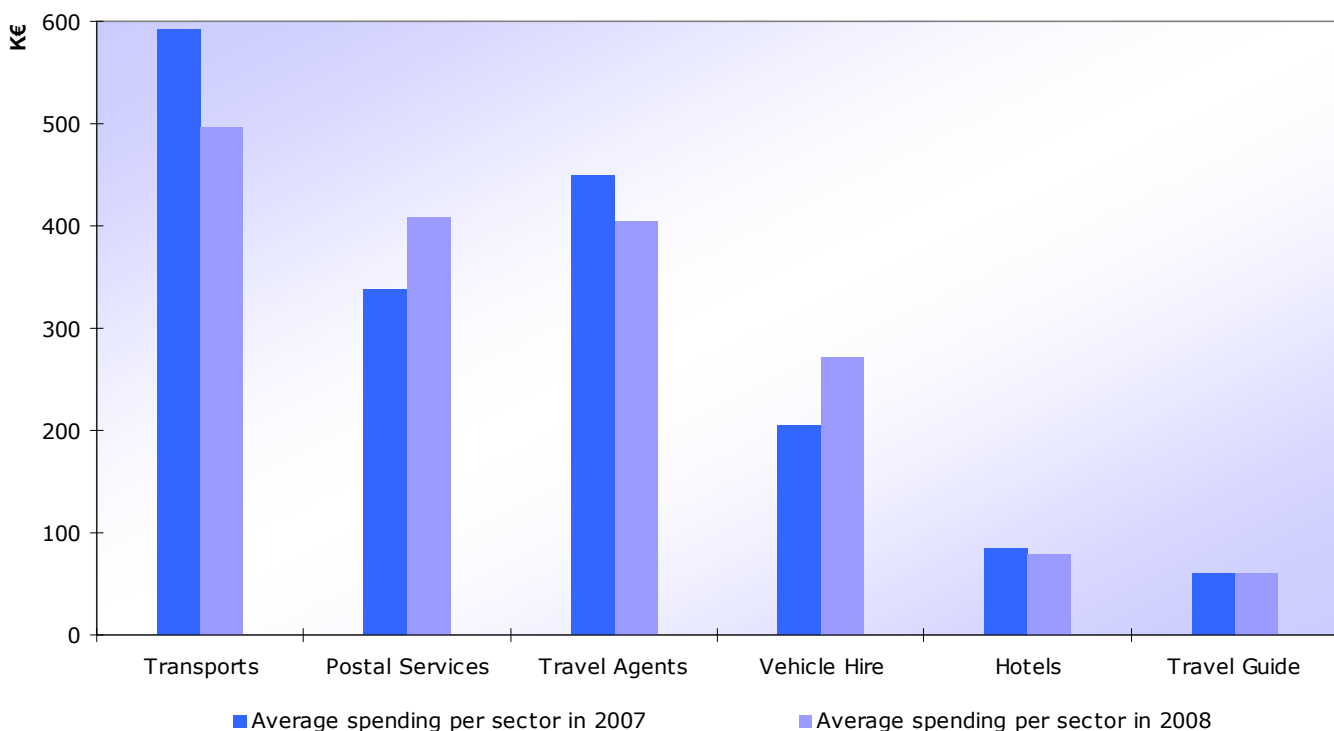


Average spending per sector in 2008 compared with Tops Ten spending and total sectors spending



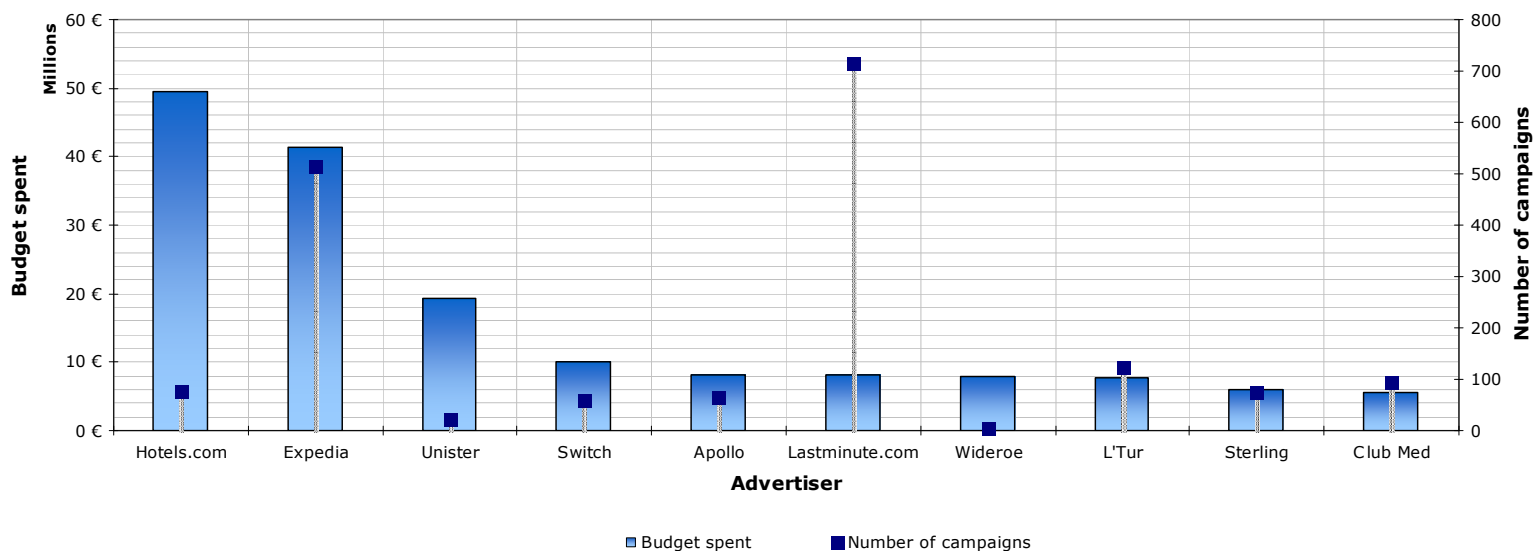
This graph shows the average spending by sub sector compared to the Top Ten advertisers' spending and the total sub sector spending. It outlines differences: for example, the category "Travel Agents" is the one which spent the most in 2008, but the category "Transports" is the one for which the average spending was the most important. This gives a different view concerning the sector's spending.

It is also interesting to compare 2008 average spending by sector with 2007 one as it decreased for some categories (Transports, Travel agents and Hotels), increased for others (Postal services and Vehicle Hire) and remained stable for Travel Guides:



### III. Activity and budgets estimates for top key players by sub sector

#### Sub-Sector "Travel Agents"



This top ten sub sector spent the most in the overall tourism sector in 2008 (as for 2007).

This top ten ran more than 1700 campaigns (27% less than in 2007) and spent 163.7 million € (56% less than last year). As per last year, it represented 53% of the total budget of the sub sector.

Compared to 2007 top ten advertisers, Voyages sncf (4<sup>th</sup> last year), Travelzoo (5<sup>th</sup>), Supersaver (6<sup>th</sup>) and Start.de (8<sup>th</sup>) quit the ranking replaced by Apollo, Wideroe, L'Tur and Sterling, respectively 5<sup>th</sup>, 7<sup>th</sup>, 8<sup>th</sup> and 9<sup>th</sup>.

Hotels.com still led the ranking followed by Expedia as last year. The 3<sup>rd</sup> one was Unister (7<sup>th</sup> last year) which replaced Switch (Partir pas Cher), 4<sup>th</sup> now. The 5<sup>th</sup> was Apollo, new one in the ranking. The 6<sup>th</sup>, Last minute, won two positions compared to 2007. The 7<sup>th</sup> was Wideroe (not in 2008 ranking). The 8<sup>th</sup>, L'Tur was not part of it neither. The 9<sup>th</sup> was Sterling. And finally Club Med kept the 10<sup>th</sup> position since 2 years.

On a geographical point of view, Germany, Norway and France concentrated 75.44% of these top ten European Investments.

**Hotels.com** spent 80% of its budget in the Nordics (Norway: 47%, Sweden: 23%, Denmark: 10%), then 12% in Germany. But other European countries also benefited from small budgets.

**Expedia** largely shared its budget with 49% in Germany, 22% in France, 13% in the UK, 7% in Italy, 5% in Norway and less than 2% in other countries.

**Unister** only focused on German speaking countries, Germany representing 99% of its budget, the rest shared between Austrian and Swiss markets.

**Switch (Partir pas Cher)** spent 100% of its budget in France.

**Apollo** only advertised in the Nordics: Norway: 47%, Sweden: 29%, Denmark: 24%.

**LastMinute.com** had a relatively classic share of its budget: the UK: 32%, France: 24%, Italy: 21%, Germany: 18% and other European countries less than 3%. There was no budget in Norway.

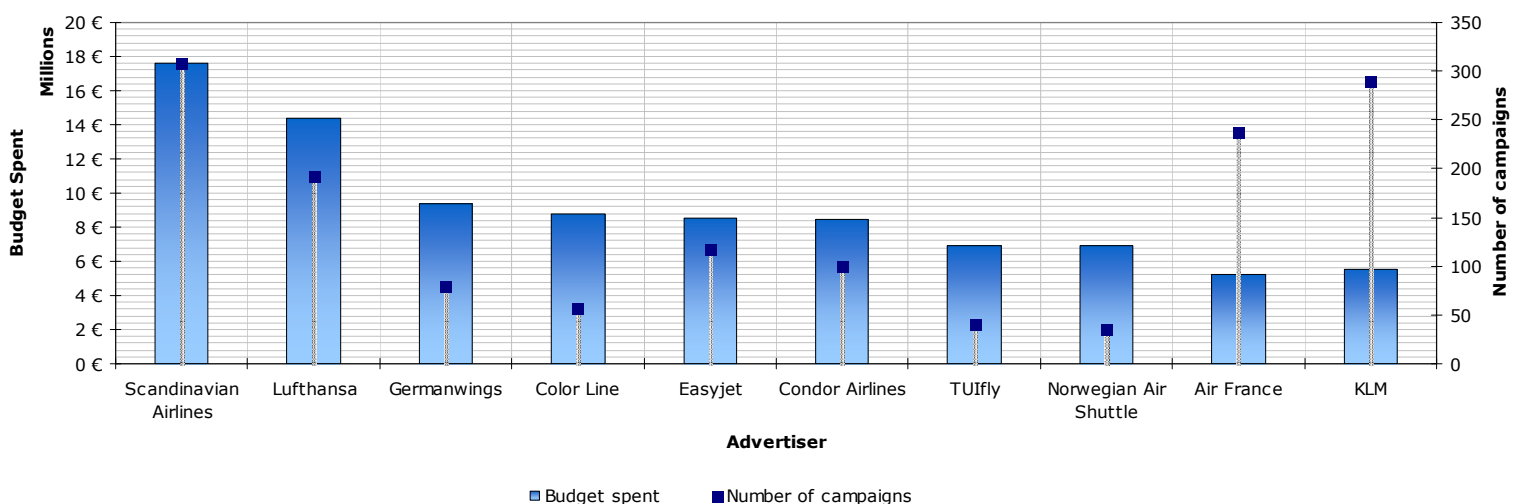
**Wideroe** is a Norwegian firm advertising only on its national market.

**L'Tur** spent 99% of its budget in Germany then small budgets in Austria, Belgium, Spain and Switzerland.

**Sterling** focused on the Nordics too with 71% of its budget spent in Norway, 24% in Sweden and 4% in Denmark. Other countries represented less than 1% and Austrian and Belgian budgets were worthless.

Finally, **Club Med** focused on its traditional market too: France, representing 87% of its budget. The UK made up 7% of it and Italy 3%. Other countries represented less than 3% of it and Austria, Denmark, Norway and Sweden were not part of its ad plan.

### Sub-Sector Transports



Those 10 advertisers ran almost 1 500 campaigns for a total budget of 91,7 million Euros. This means a 15% rise in the number of campaigns and 11% in spending since last year. They concentrated 51% of the sub sector total spending.

Three advertisers quit the ranking: British Airways (6<sup>th</sup> last year), Eurotunnel (9<sup>th</sup>) and Sky Europe (10<sup>th</sup>) to be replaced by TuiFly, Norwegian Shuttle and Air France respectively 7<sup>th</sup>, 8<sup>th</sup> and 9<sup>th</sup> of 2008 ranking.

Their countries targets were mainly Norway (34%), Germany (33%) and the UK (11%).

The main advertisers of this sub sector was Scandinavian Airline (2<sup>nd</sup> last year) which replaced KLM (now 10<sup>th</sup>). Lufthansa won 2 positions compared to last year ranking, to be 2<sup>nd</sup>. Germanwings won 4 positions being 3<sup>rd</sup> this year and replacing Easyjet, now 5<sup>th</sup> of the ranking. Color Line won 4 positions too and is at the 4<sup>th</sup> position this year. Condor Airlines, 6<sup>th</sup> in the ranking lost one position. TuiFly directly entered the ranking at the 7<sup>th</sup>

position. Norwegian Air Shuttle was also new in the ranking and entered at the 8<sup>th</sup> position. Air France entered it at the 9<sup>th</sup> position. Finally, KLM regressed to the 10<sup>th</sup> position.

**Scandinavian Airlines** targeted the Nordics as its budget was shared between Norway: 77%, Sweden: 17% and Denmark: 2%. Other countries represented less than 2% of its budget and there was no budget in Austria.

**Lufthansa** advertised in every European country; Germany: 31%, Norway: 22%, Sweden: 12%, Italy: 9%, the UK: 8%, Austria: 6% and other countries: 4% or less.

**Germanwings** focused on its primary market: Germany concentrated 95% of its budget. The UK and Austria represented 4% and 1% of it.

**ColorLine** also focused on its market with Norway representing 95% of its budget. The transporter also spent 5% of its budget in Germany.

**Easyjet** shared its budget between the UK: 62%, France: 18%, Italy: 11%, Switzerland: 3%, Spain: 3% and other European countries: less than 1%. Easyjet didn't advertise in Austria.

**Condor Airlines** focused on the German market with 99% of its budget spent in this country. There also were small budgets in Austria and Spain. There were no budgets in other European countries.

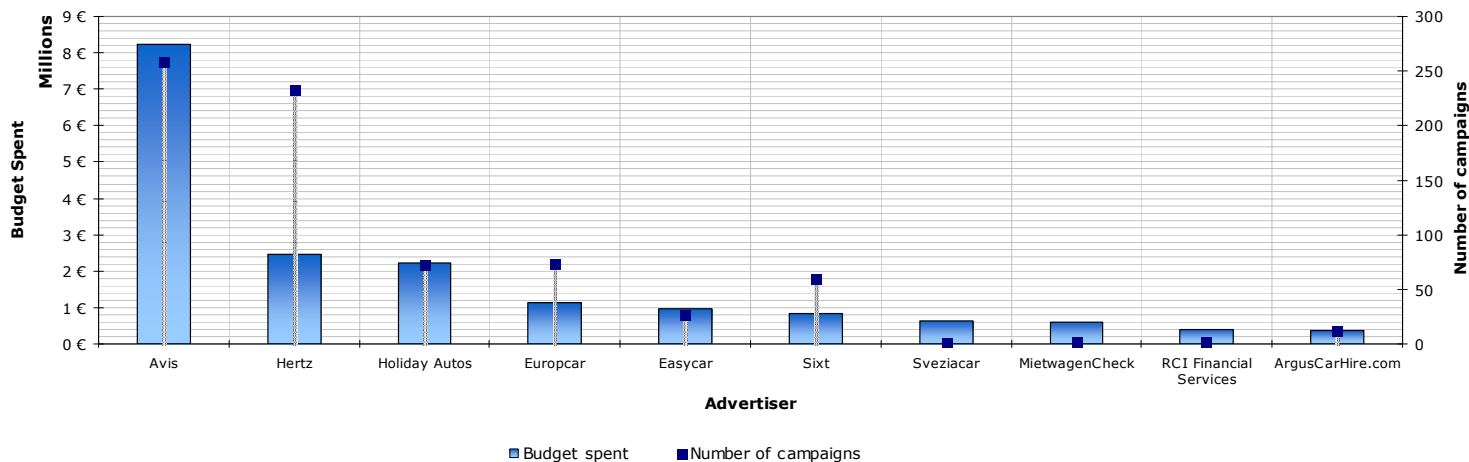
**TuiFly** spent 95% of its budget in Germany plus small budgets in Italy and Austria. TuiFly didn't advertise in other European countries.

**Norwegian Air Shuttle** only advertised in the Nordics with 78% of its budget dedicated to Norway, 14% to Sweden and 8% to Denmark.

**Air France** mainly advertised in France (55% of its budget), the UK (20%), Norway (12%) and Germany (6%). The French transporter also spent small budgets in other European countries.

Finally, **KLM** shared its budget between the UK (33%), the Netherlands (23%), Germany (13%), France (7%) and Sweden (7%). Other European countries represented less than 4% of its budget.

## Sub-Sector Vehicle Hire



The top ten advertisers in the Vehicle Hire sub sector ran more than 700 campaigns (+21% compared to 2007) for a total budget of almost 17.8 million Euros in 2008 (-7% compared to 2007). This represented 88% of the total budget of this sub sector.

Compared to last year top ten, National Citer (5<sup>th</sup> last year), Budget (6<sup>th</sup>), Euromobil (8<sup>th</sup>) and Alamo (10<sup>th</sup>) quit the ranking to be replaced by Sveziacar, MietwagenCheck, RCI Financial Services and ArgusCarHire.com, 7<sup>th</sup>, 8<sup>th</sup>, 9<sup>th</sup> and 10<sup>th</sup> respectively.

Avis ranks position 1 since 2007, followed by Hertz (which was 3<sup>rd</sup> last year) and replacing Holiday Autos (now 3<sup>rd</sup> in the ranking). Europcar won 3 positions in the ranking going from 7<sup>th</sup> to 4<sup>th</sup> this year and replacing EasyCar, now 5<sup>th</sup>. Sixt won 3 positions too going from 9<sup>th</sup> to 6<sup>th</sup>. Sveziacar entered the ranking directly at the 7<sup>th</sup> position, followed by the 3 others new advertisers in the ranking: MietwagenCheck (8<sup>th</sup>), RCI Financial Services (9<sup>th</sup>) and ArgusCarHire.com (10<sup>th</sup>).

Concerning geographical targets of this top ten, advertisers mainly spent in the UK (28.4% of their budgets), France (24.6%) and Germany (21.8%). Thus, those 3 countries represented 74.8% of their investments.

**Avis** shared its budget between France (33%), Germany (24%), the UK (18%), Italy and Norway (each 5%) and Sweden and Switzerland (each 4%). Other European countries represented less than 3% of its budget.

**Hertz** spent 33% of its budgets in Norway, 19% in Germany, 16% in the UK, 12% in Italy, 11% in France, 6% in Sweden, 2% in Spain and less than 2% in other European countries excluding Denmark.

**Holiday Autos** spent 56% of its budget in the UK, 26% in Germany, 12% in Sweden, 4% in Denmark, 2% in Norway and less than 2% in other European countries. Holiday Autos had no budgets for Austria, Belgium, Italy and Switzerland.

**Europcar** mainly focused on the French market with 71% of its budget dedicated to it. The rest of its budget was shared between the UK (20%), Germany (5%), Spain and Belgium (2% each). Other countries (except Austria, Denmark and Sweden for which there were no budgets) represented less than 2% of Europcar budget.

**Easycar** mainly advertised in the UK (95% of its spending). There were also small budgets in France, Germany, Italy, Spain and Switzerland.

**Sixt** shared its budget between France (68%), Germany (29%), Austria (2%), the Netherlands (1%), and Belgium, Switzerland and the UK (less than 1%).

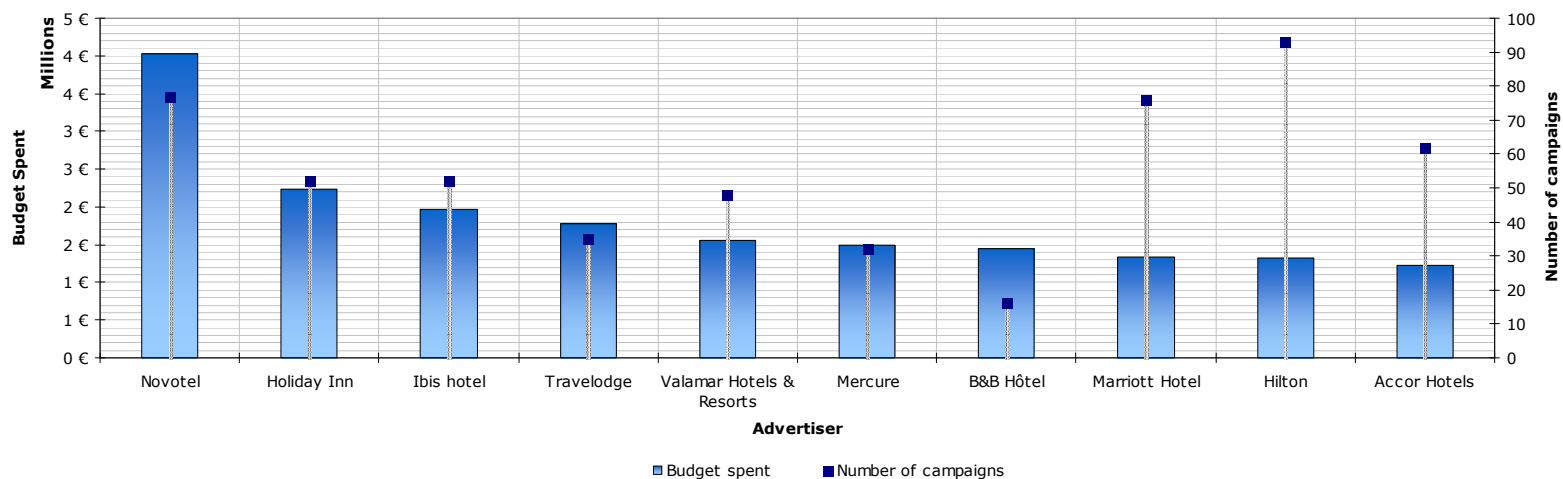
**Sveziacar** spent its whole budget in Italy.

**MietwagenCheck** only advertised in Germany.

**RCI Financial Services** spent 100% of its budget in the UK.

Finally, **ArgusCarHire.com** only advertised in the UK too.

### Sub-sector Hotels



Advertisers appearing in this top ten are international leading hotels chains. They ran almost 550 campaigns in 2008 and spent more than 18 million €. This is 22% more campaigns than last year but 17% less spending. This represented 41% of the total sub sector 2008 spending. This ranking makes the distinction between several sections of Accor Group as Novotel, Ibis Hotel, Mercure and Accor Hotels are all part of it. Thus if we cumulate all Accor Group spending, the sector would be largely dominated by this company.

Compared to 2007 top ten, Etap Hotels (5<sup>th</sup> in 2007), Sol Melia (6<sup>th</sup>) and Intercontinental Hotels (9<sup>th</sup>) quit the ranking to be replaced by Holiday Inn, Travelodge and B&B Hôtel, respectively 2<sup>nd</sup>, 4<sup>th</sup> and 7<sup>th</sup> in 2008 ranking.

This top ten's investments geographical scope was mainly Germany (38.5%), the UK (34.7%) and France (18.3%).

The leader this year is Novotel (10<sup>th</sup> in last year ranking) taking the place of Accor Hotels only 10<sup>th</sup> in this year ranking. The 2<sup>nd</sup> position is taken by Holiday Inn new one in the ranking, which replaced Hilton (9<sup>th</sup> this year). Ibis Hotel, 3<sup>rd</sup> in the ranking, kept the same position as last year. The 4<sup>th</sup> is a new one: Travelodge. It replaced Valamar Hotels which is 5<sup>th</sup> this year. Mercure won 1 position, being 6<sup>th</sup> this year. B&B hôtel entered the ranking at the 7<sup>th</sup> position. Marriott Hotel kept the 8<sup>th</sup> position it had last year.

**Novotel** shared its budget between Germany (78%), France (16%), Spain (4%), and the UK (2%). There were also little budgets in Belgium, Italy and the Netherlands.

**Holiday Inn** focused on the UK dedicated 99% of its budget to it, then little budgets in France, Germany, Italy and Spain.

**Ibis Hotel** spent 64% of its budget in Germany, 12% in the UK, 11% in France, 5% in the Netherlands and less than 3% in other European countries. Ibis didn't advertise in Denmark and Norway.

**Travelodge** shared its budget between the UK (98%) and Spain (2%).

**Valamar Hotels & resorts** spending were shared between Italy (47%), Germany (41%), the UK (7%), France (3%), and Austria (2%). Other European countries (except Belgium, Denmark, Norway, Spain, Sweden and Switzerland) represented less than 2% of Valamar's budget).

**Mercure** spent 74% of its budget in Germany, then 20% in France and less than 2% in other European countries (apart from Belgium, Denmark, Italy, Norway, Spain and Sweden).

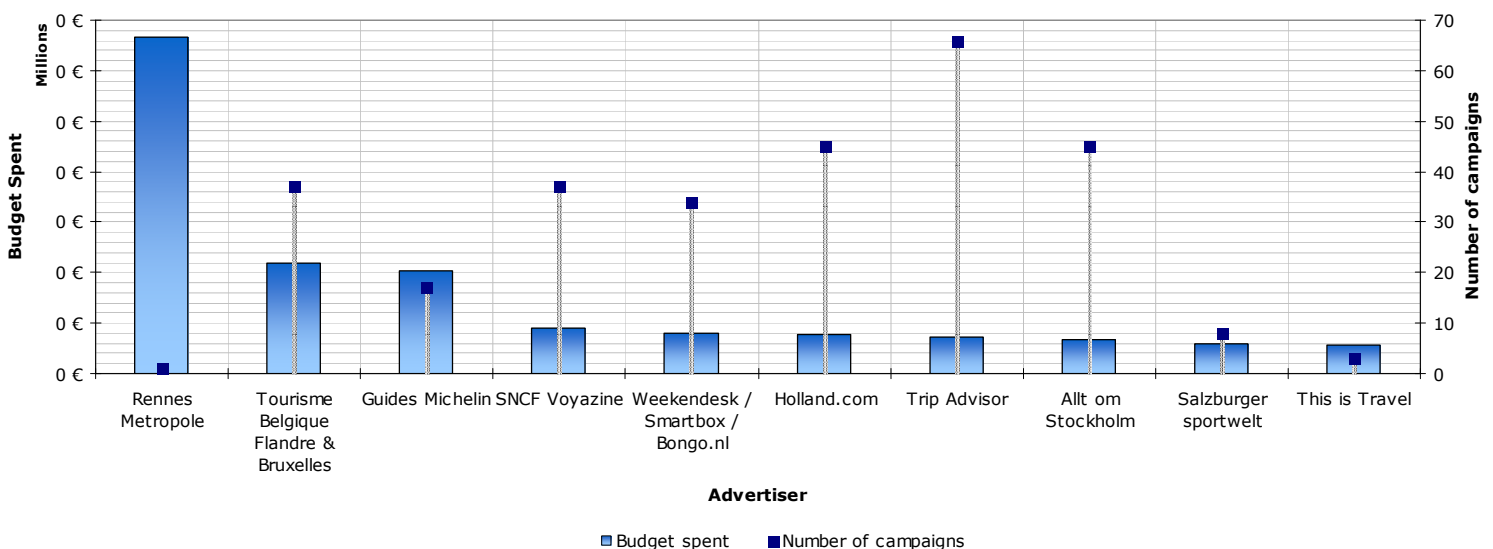
**B&B Hôtel** mainly advertised in France (98% of its budget), plus little budgets in Belgium and Germany.

**Marriott Hotel** focused on the UK (76% of its spending), then on Germany (23%), and ran little campaigns in Austria, Italy and Spain.

**Hilton** mainly advertised in the UK (72% of its budget), then in Germany (27%), plus little budgets in Belgium, Denmark, France and Italy.

**Accor Hotels** shared its budget between France (56%), Germany (20%), the Netherlands (20%), Spain (2%) and other European countries (less than 2%). Accor did not advertise in Denmark, Italy, Norway, Sweden and Switzerland.

### Sub-sector Travel Guide



In 2008, Those 10 advertisers ran almost 300 campaigns (+281% compared to last year) and spent 7.9 million € (6% more than in 2007). This represented 54% of this sub sector spending.

This Top Ten is completely different than the 2007 one. In fact, only Guides Michelin and Salzburger Sportwelt stayed in the ranking.

Concerning the geographical scope of their campaigns, this top ten advertisers is, on average, less concentrated on national markets than 2007's top ten. Thus, main targets are France: 76,7%, the UK (8,9%) and Germany (7,6%).

**Rennes Metropole** spent 100% of its budget in France.

**Tourisme Belgique** shared its budget between France (86%), the UK (7%), Germany (4%), Austria (2%), and Spain (less than 2%).

**Guides Michelin** focused on France with 96% of its budget devoted to it. There also were little budgets for Spain and Italy.

**SNCF Voyazine** only advertised in France.

**Weekendesk** shared its budget between France (72%), Switzerland (18%), the UK (5%), and Belgium, Germany, the Netherlands, Spain and Sweden (each less than 2%).

**Holland.com** mainly advertised in Germany (63% of its spending), in the UK (36%) and in the Netherlands and Spain.

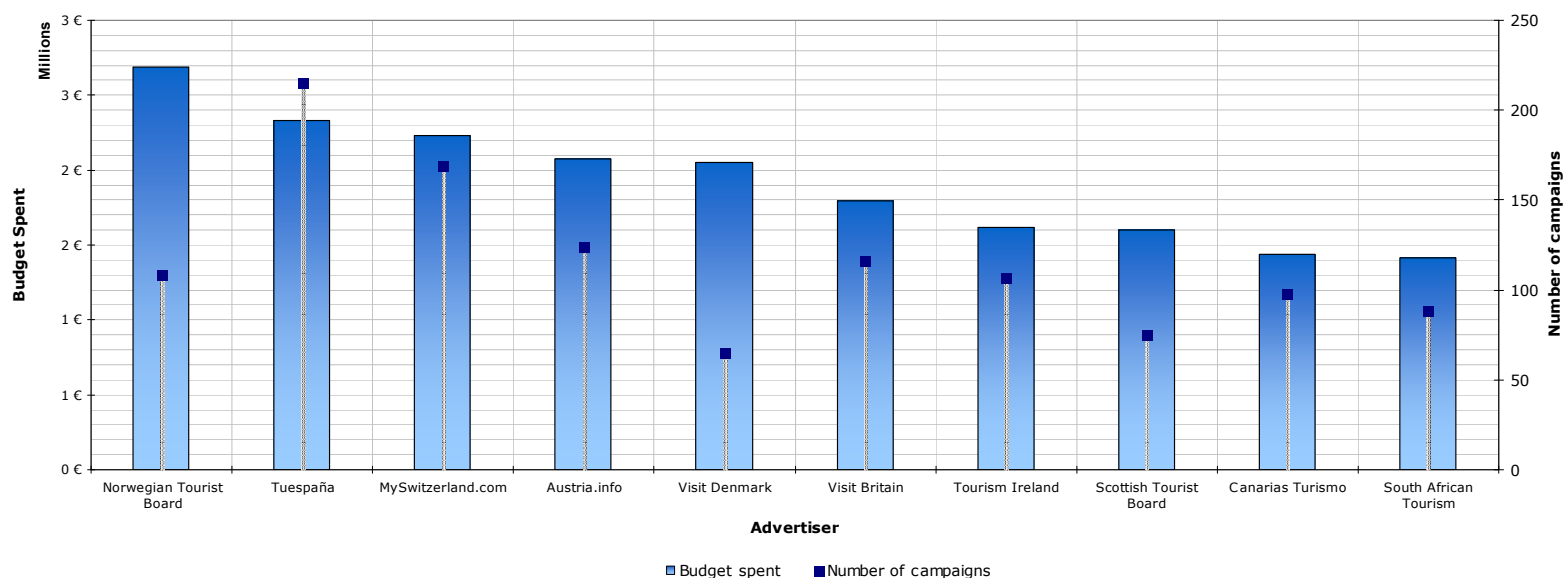
**TripAdvisor** spent 52% of its budget in the UK, 33% in France, 9% in Italy and 6% in Germany.

**Allt Om Stockholm** only advertised in Sweden.

**Salzburger Sportwelt** spent 99% of its budget in Germany plus little budget in Austria.

**This is Travel** spent 100% of its budget in the UK.

### Sub-sector Tourist Boards



The sub sector « Tourist Boards » was not in our report last year.

This top ten ran more than 1100 campaigns in 2008, for a total budget of 19.2 million Euros. This represented 39% of this sub sector spending.

Concerning the geographical targets, those 10 advertisers mainly focused on Germany (31%), France (19%), the UK (17,5%) and Norway (11,5%).

**Norwegian Tourist Boards** spent 69% of its budget in Norway, 9% in Denmark and 9% in the UK, 6% in Germany, 3% in Sweden and less than 3% in other European countries except Austria, Belgium, Italy and Switzerland.

**Turespaña** spent 64% of its budget in Germany, 11% in Spain and 11% in France, 5% in the UK, 4% in Italy then less than 2% in other European countries. Turespaña didn't advertise in Austria.

**MySwitzerland.com** shared its budget between France (53%), Germany (38%), Switzerland (4%), Italy (3%), and other European countries (less than 3%) except Denmark and Sweden.

**Austria.info** shared its budget between Germany (41%), Belgium (13%), Denmark (11%), the UK (10%), Sweden (7%), the Netherlands (6%), France (5%), Italy and Switzerland (3% each) and other European countries (less than 3%) except Norway.

**Visit Denmark** spent 36% of its budget in the UK, 32% in Germany, 24% in Sweden, 6% in Italy and the rest in other European countries (except Belgium, the Netherlands and Spain).

**Visit Britain** focused on France (43% of its budget), Germany (18%), Switzerland and Spain (8% each), Italy (7%), the UK (7%), Austria (4%) and other European countries.

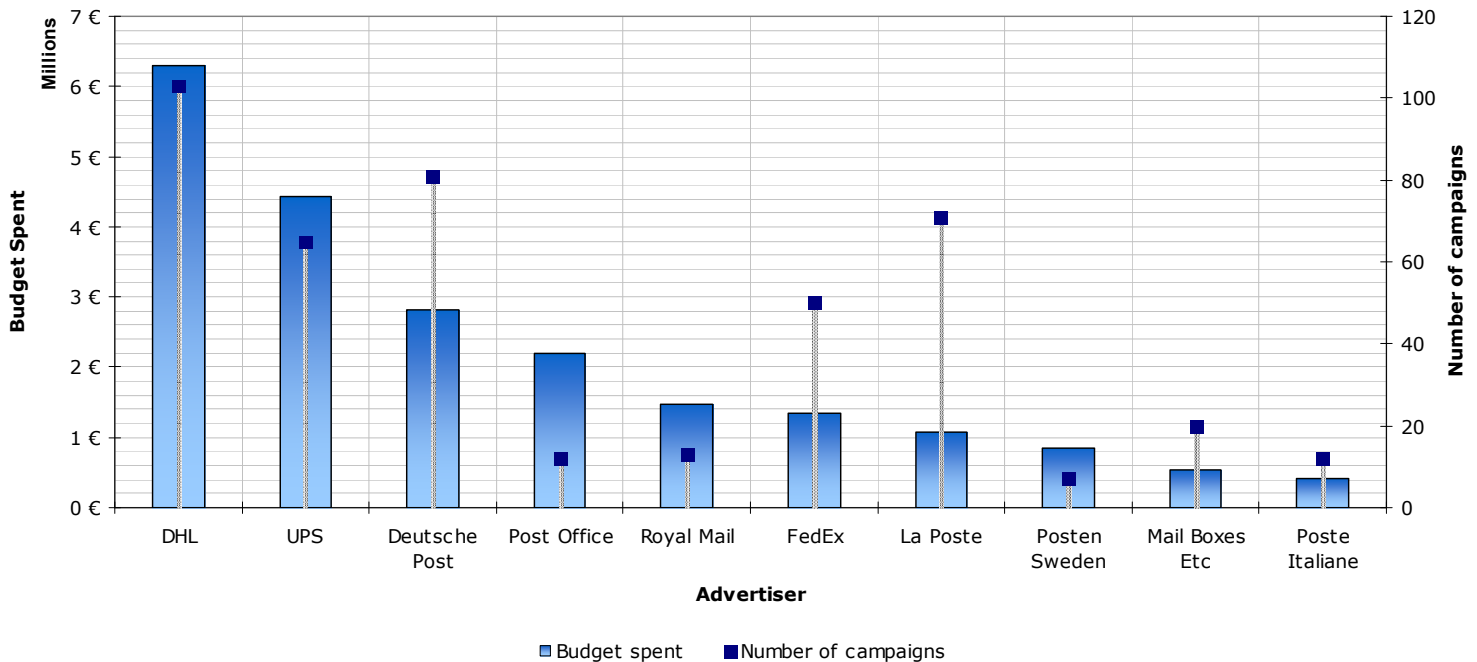
**Tourism Ireland** shared its budget between Germany (26%), the UK (25%), Spain (13%), Italy (12%), France (8%), Denmark (6%), Belgium (3%), Norway (3%) and other European countries.

**Scottish Tourist Board** focused on the UK (48%), France (29%), Germany, Spain and the Netherlands (each 7%), and other European countries (less than 2%) except Belgium, Denmark and Norway.

**Canarias Turismo** mainly advertised in the UK (47%), France (26%), Germany (19%) and Spain (7%), the rest going to the other European countries except Norway.

**South Africa Tourism** spent 57% of its budget in Germany, then 24% in the UK, 18% in France and less than 2% in other European countries. There were no budgets in Austria, Belgium, Denmark, Norway and Sweden.

Sub-sector « Postal Services »



Those ten advertisers ran more than 430 campaigns in 2008, for a total budget of 21.4 million Euros. This was 25% more campaigns for 13% more budget than in 2007. This represented 89% of the total spending of this sub sector.

Compared to last year top ten, Parcel Force (8<sup>th</sup> last year) and Posten Norway (10<sup>th</sup>) quit the ranking to be replaced by Royal Mail (5<sup>th</sup>) and Poste Italiane (10<sup>th</sup>).

The geographical targets of these ten advertisers investments are Germany: 51,25% of their budget, the UK (25,9%) and France (10,3%).

DHL still dominated this ranking, keeping the 1<sup>st</sup> position since last year. UPS, 2<sup>nd</sup> this year, won 3 positions, replacing FedEx, now 6<sup>th</sup>. The 3<sup>rd</sup>, Deutsche Post was 4<sup>th</sup> in 2007 and took the place of Post Office, now 4<sup>th</sup>. Royal Mail directly entered this ranking at the 5<sup>th</sup> position. La Poste lost 1 position and was 7<sup>th</sup> this year replacing Posten Sweden, now 8<sup>th</sup>. Finally, Mail Boxes Etc and Poste Italiane entered the ranking at the 9<sup>th</sup> and 10<sup>th</sup> positions.

**DHL** shared its budget between Germany (86%), France (4%), Sweden and the UK (3% each) and other European countries (less than 2%).

**UPS** spent 58% of its budget in Germany, 19% in the UK, 16% in France, 7% in Italy and less than 1% in other European countries excluding Denmark, the Netherlands, Norway, Spain, Sweden and Switzerland.

**Deutsche Post** spent its whole budget in Germany (plus little budget in Austria).

**Post Office** spent 100% of its budget in the UK.

Also **Royal Mail** concentrated its campaigns on the UK.

**FedEx** shared its budget between the UK (66%), France (19%), Germany (14%), Spain (1%), and other European countries (less than 1%), except Austria, Belgium, Denmark, Italy, Norway, Sweden and Switzerland.

**La Poste** spent 96% of its budget in France, then the rest on the UK, Belgium and Germany.

**Posten Sweden** focused on its market spending 100% of its budget in Sweden.

**Mail Boxes Etc** spent 100% of its budget in Italy (plus little budget in Spain).

Finally, **Poste Italiane** only advertised in Italy.

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