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## Creative ad formats : Still limited but growing across Europe

 [See definitions and methodology](#)

As traditional media, Internet evolves and the search of new forms of communication takes part in this evolution. In a concern of creativity and efficiency, new sizes and new technical formats of ads are appearing on the web. Common questions asked are... What are the sizes and technical formats of online ads in 11 European markets? How vertical ads, also called skyscrapers, and rich media, that is HTML and Flash formats, compete with usual banners? Which are the specifications of such ads in terms of advertisers, websites, media planning indicators? All the answers are found below...

### Content :

- ⌂ [Section I](#) : Ad sizes and technical formats across Europe
- ⌂ [Section II](#) : Focus on vertical size ads
- ⌂ [Section III](#) : Focus on rich media format

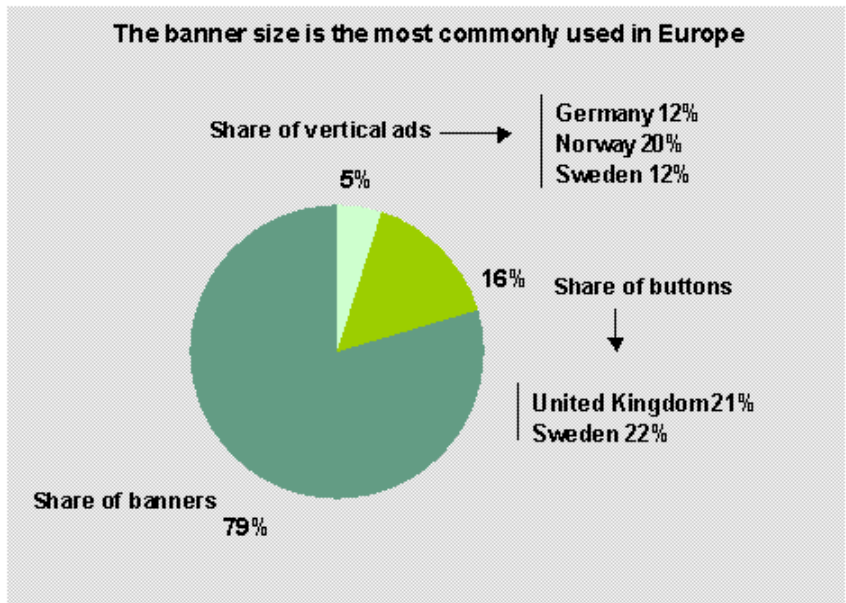
### **Section I : Ad sizes and technical formats across Europe**

- I. [Sizes & formats](#)
- II. [Verticals](#)
- III. [Rich Media](#)

Though advertisers, agencies and sales houses try to innovate with more sophisticated sizes and technologies, to generate impact and efficiency, banners and animated GIF are still the dominant formats of online advertising in Europe.

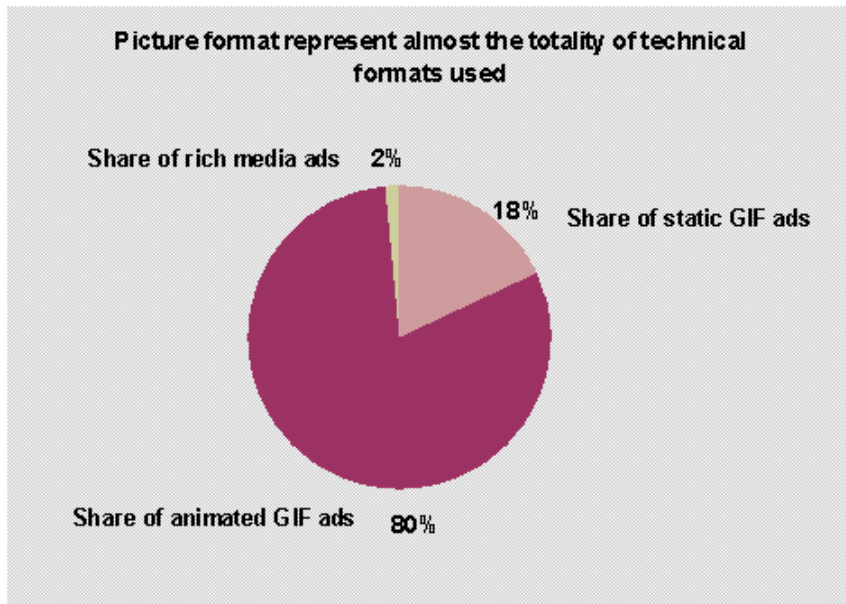
*The banner size is the most commonly used.*

Among more than 200,000 ads displayed in Europe between November 2000 and March 2001, banners account for 80%. The new and fashionable vertical ads represent only 5%, but their share is much bigger in some said to be "advanced" countries such as Germany, Norway or Sweden which use vertical ads as often as buttons. However, with regards to buttons, the share is more important in United Kingdom and Sweden.



The animated GIF format ads are the most commonly displayed in Europe.

80% of ads are animated GIF ads and 18% static GIF, mainly buttons. More interactive technologies such as HTML or high impact ones like Flash are still very limited in all countries. Only France (4%) and Sweden (3%) are over the European average rate equal to 2%.



In summary, concerning vertical ads and rich media ads, 3 groups of countries appear :

	Vertical ads	Rich media
Above the average	Norway 20% Germany, Sweden 12%	France 4% Sweden 3%
Around the average	United Kingdom 5% France 4%	Germany, Denmark, United Kingdom 2%
Below the average	Denmark, Netherlands, Spain 2% Austria, Belgium, Italy 1%	Austria, Belgium, Italy, Netherlands, Norway, Spain 1%

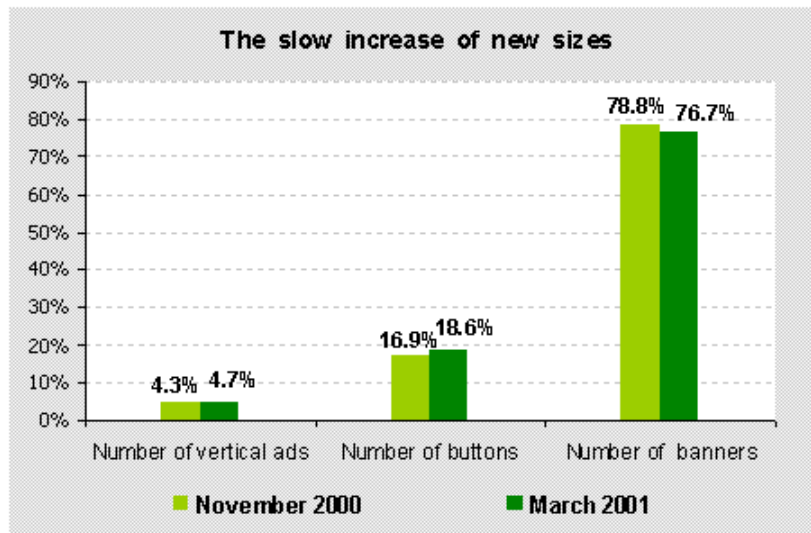
*Slow evolution between November 2000 and March 2001.*

While the share of HTML or Flash ads remains steady over the period, vertical ads were slowly increasing between November 2000 and March 2001. Some countries, France, Germany and Spain show more dynamic trends, while Sweden, Norway and United Kingdom show a declining share. It is interesting to notice that there are no seasonal trends especially before the Christmas period.

Evolution of the share of vertical ads

	November 2000	March 2001	Evolution
<b>Europe</b>	<b>4.3%</b>	<b>4.7%</b>	<b>+0.4</b>
France	2.3%	4.5%	+2.3
Germany	9.5%	11.6%	+2.0
Spain	0.7%	2.5%	+1.9
Denmark	1.0%	2.3%	+1.3
Netherlands	0.7%	1.9%	+1.2
Italy	0.9%	1.8%	+0.9
Belgium	0.5%	1.4%	+0.8
Austria	0.3%	1.1%	+0.8
United Kingdom	4.2%	3.5%	-0.7
Norway	18.5%	17.5%	-1.1
Sweden	11.4%	8.4%	-3.0

Button and vertical sizes tend to increase very slowly, while banner size decreases.

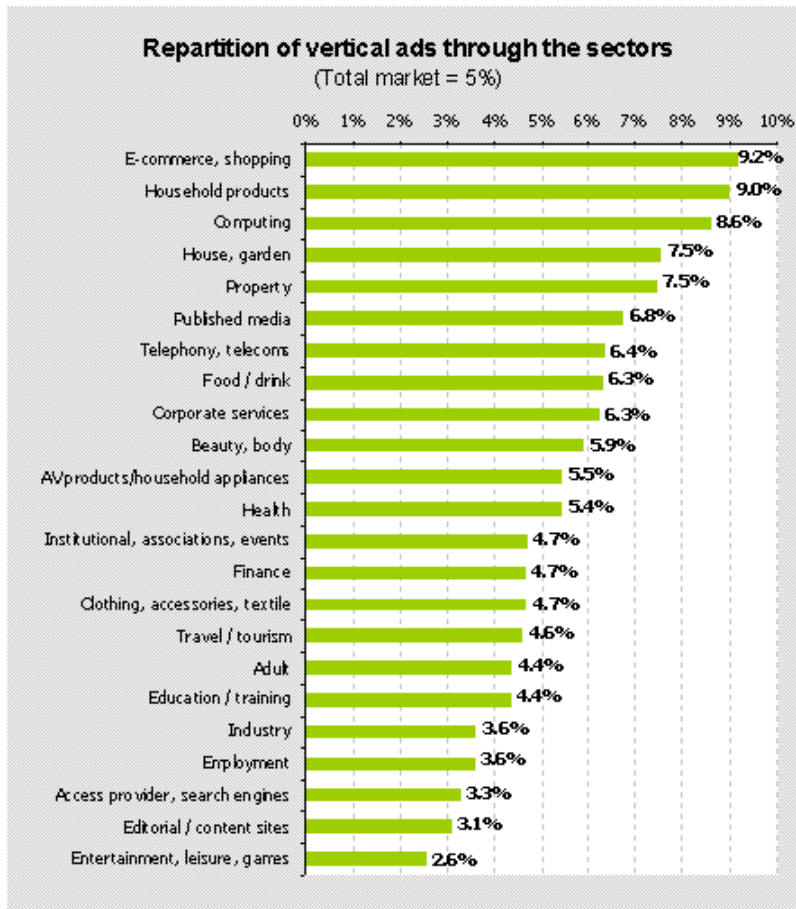


➔ **Section II : Focus on vertical size ads**

- [I. Sizes & formats](#)
- [II. Verticals](#)
- [III. Rich Media](#)

*Penetration of vertical ads varies on the industry sector*

E-commerce / shopping and computing are sectors where advertisers use more vertical ads with more than 8% share.



The first 10 advertisers use approx 12% of vertical ads in their advertising

For e-commerce / shopping sector, the use of this size can give an extra information on the product to be sold. For example, BOL use vertical size to reproduce book covers and, by this way, to indicate quickly the activity and to show a recognizable and easily remembered advertising message.

Skyscrapers also give an idea of modernity and high-tech feeling, so the computing sector, with advertisers like Dell, IBM or Intel, use a lot of vertical ads.

Top 10 advertisers in number of vertical ads in Europe

Advertisers	Field of activity	Nb of vertical ads
BOL	Specialized e-commerce (books,cds...)	288
Buy.com	General e-commerce	218
Spray	General search engines and directories	105
Telenor	Corporate telecommunications	104
BlackStar	Specialized e-commerce (books,cds...)	100
Codygifts.com	Specialized e-commerce (books,cds...)	95
Dell	Multi activity	93
yaTack	General e-commerce	85
Intel	Computers	75
IBM	Multi activity	74

Sites where the greatest number of vertical ads are displayed are very diverse

**YOUR HOSTING NEEDS ARE UNIQUE.**

**SO ARE OUR SOLUTIONS.**

Let's put one together for you.

business hosting



Top 10 sites in % of vertical ads

Country	Sites	Category	%
Germany	Financial Life Magazine	News	84%
United Kingdom	Beme	Specialist interest	82%
Netherlands	Bekpek	Specialist interest	76%
Netherlands	Archistart	Specialist interest	74%
Netherlands	Golfnet	Specialist interest	67%
Germany	Altavista Germany	General search engines and directories	66%
Germany	Meine Stadt	Guides	64%
Italy	Goa - good advice	News	58%
Sweden	Morningstar	News	50%
Sweden	MSN Sweden	General search engines and directories	44%

Top 5 sites in % of vertical ads in United Kingdom, Germany and France

United Kingdom		Germany	France	
Beme	82%	Financial Life Magazine	84% Kelkoo France	36%
The register	33%	Altavista Germany	66% ZDNet France	26%
Gay.com United Kingdom	23%	Meine Stadt	64% Bravonestor	20%
VNU Net United Kingdom	22%	G List	29% Toobo	16%
Ireland	21%	Onvista	28% VNU Net France	16%

In Europe, 9 sites display more than 50% of vertical ads and 132 display more than 10% of vertical ads. In spite of the constraints involved to publish vertical ads (design of pages, technical adaptations,...), the number of sites displaying them has increased : in November 2000 it was equal to 15% and in March, it reached 19%.

*Media planning indicators*

Not all sites commercialize vertical ads. As a consequence, when, in Europe, an ad is displayed on average on 2.6 sites, a vertical one is run on an average number of 1.3 sites.



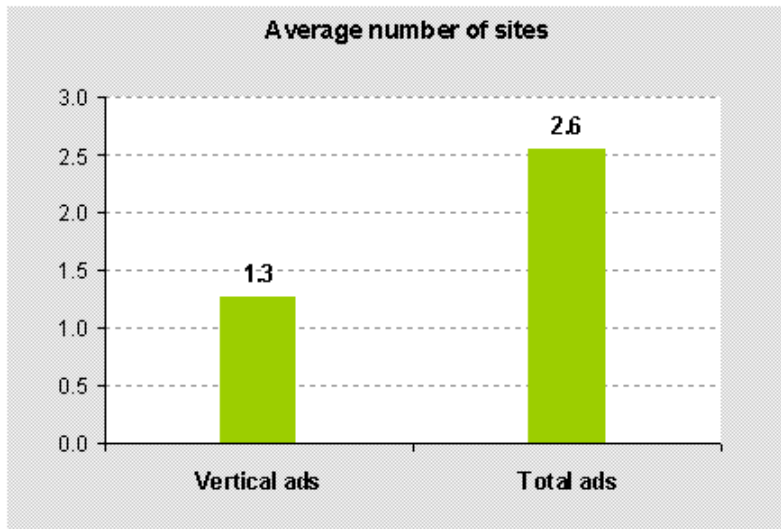
**RELIABLE  
UPGRADEABLE  
NOW AVAILABLE**

AT  
**£799**  
EXC DEL & VAT



**DELL POWEREDGE  
1300 SERVER  
DUAL PROCESSOR  
CAPABLE SERVER**

**CLICK HERE**



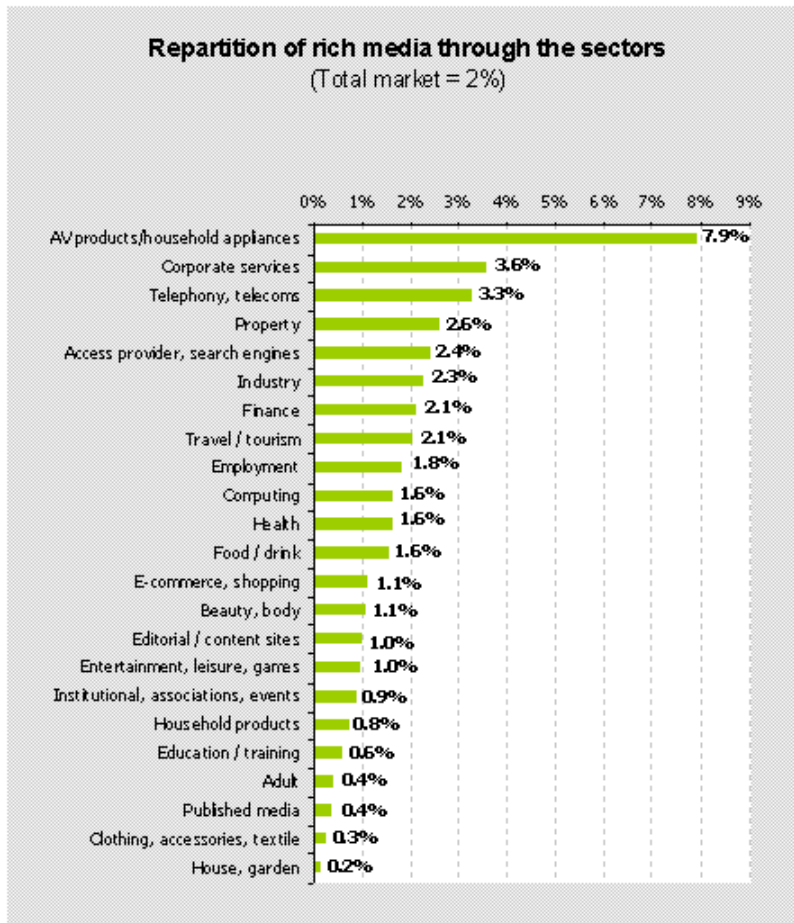
With an average of 24 days of presence, vertical ads do not dramatically differ from ads in general.

➡ **Section III : Focus on rich media format**

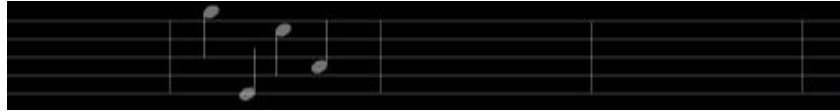
- I. [Sizes & formats](#)
- II. [Verticals](#)
- III. [Rich Media](#)

With them making up only 2% of the total of ads, HTML and Flash formats remain limited

Some industry sectors are nevertheless more heavy users of these technologies. Among them are audiovisual, telephony, services.



In the audiovisual products/household appliances sector, advertisers like Philips and Sony find with HTML and especially Flash format, a way to deliver a sophisticated and high-tech message corresponding to their brand image.



 [Click here to launch the Flash example](#)

However, the advertisers from the services sector, such as Network Solutions or Marketo, use the interactivity of HTML ads including scrolling menus, text fields to fill and other possibilities.



**Whatever your business...**

Select Your Industry:  Go!

Nethertheless, the origin of advertisers using rich media is really diverse

*The first 10 advertisers concentrate 20% of all rich media ads displayed in Europe*

Top 10 advertisers in number of rich media ads in Europe

Advertisers	Field of activity	Nb of RM ads
Intelligent Finance	Financial and banking services	146
Network Solutions	Corporate services (Advertising agencies, sales houses...)	96
Ask Jeeves	General search engines and directories	76
Hewlett Packard	Multi activity	71
Marketo	Corporate services (Advertising agencies, sales houses...)	53
One.Tel	Phone operators (traditional)	43
Orange	Mobil phone operators	42
Sony	Multi activity	38
Volvo	Cars motor bikes	37
I minitel	General search engines and directories	36

*Only 10 sites in Europe have more than 15% ads in HTML and Flash*

At a maximum, this format reaches 30% of ads.

Top 10 sites in % of rich media ads

Country	Sites	Category	%
Germany	TelTarif	Consumer services	31%

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Belgium	Mamboenco	Targeted communities	25%
United Kingdom	BT Spree	General e-commerce	23%
United Kingdom	Waitrose United Kingdom	Other editorial sites	23%
United Kingdom	Bolt	Community sites	21%
Denmark	Alt om København	Guides	21%
Sweden	Locnet	Targeted communities	19%
France	Business Angels	Corporate services (Advertising agencies, sales houses...)	16%
Sweden	Lumumma	Targeted communities	16%
Denmark	Københavns Fondsbørs	News	15%

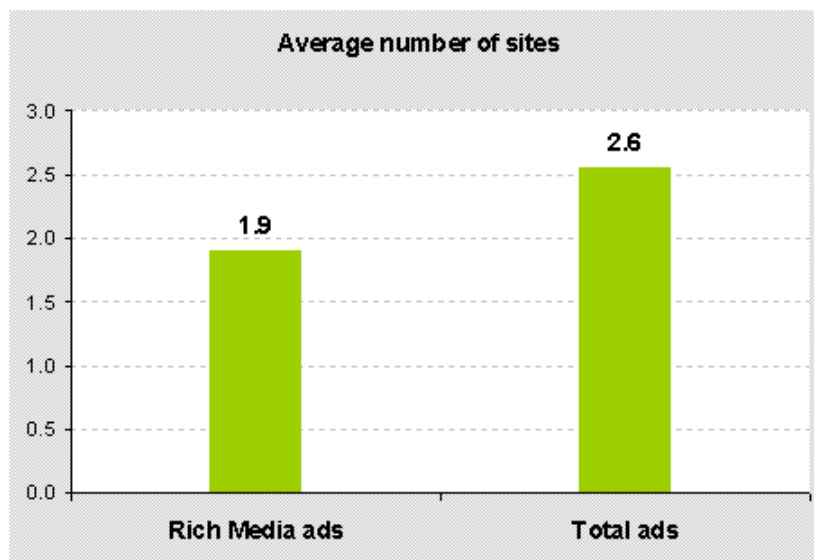
Top 5 sites in % of HTML and Flash ads in United Kingdom, Germany and France

United Kingdom		Germany	France	
BT Spree	23%	TelTarif	31%	Business Angels 16%
Waitrose United Kingdom	23%	Onium	12%	Professional Networks/Business Angels 14%
Bolt	21%	Allegra	9%	Cessions & Transmissions 13%
Car-ad	14%	VH 1	9%	Le Nouvel Economiste 13%
Wicked Colors	12%	Fnet	8%	Up Desk 13%

Contrary to vertical ads, the number of sites displaying HTML and Flash ads remains rather stable between November 2000 and March 2001. As a total, 406 sites displayed Rich media ads in November and 441 in March.

*In terms of media planning indicators, HTML and Flash ads are very similar to vertical ones*

Rich media ads are displayed on a smaller number of sites. This is possibly because new formats are more difficult to use due to technical reasons



On average, this type of ads have 23 days of presence compared to 27 days for all ads.

### METHODOLOGY

*The above study is based on the following universe.*

**Europe:** Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Norway, Spain, Sweden, United Kingdom

**Period:** November 2000 to March 2001

**Perimeter:** 2 686 monitored sites, 96 892 monitored pages , 212 181 monitored ads

**Rich media ads:** HTML and Flash ads

**Vertical ads:** Ads with greater height than breadth

### DEFINITIONS

**Campaign:** One or several ads linking to the same web page (same URL) during a given period. After 7 consecutive days of interruption, the campaign is finished.

**Ad:** Advertising message identified by LemonAd, thanks to the click counter and regardless of its size (banner, button...) or the technology used.

### **Formats:**

*Image : Animated or static creation in the form of picture file mostly GIF, but sometimes under other file types (JPEG, PNG, and so on).*

*HTML : HTML coded ad, allowing the integration of pictures and more dynamic elements, classically a list of choices.*

*Flash : Creation in the Flash format, animated and integrating sounds and/or interactive elements (NB: not detected before October 2000).*

### **Sizes:**

*Vertical ad : An ad with greater height than breadth.*

*Button : A horizontal ou square ad of at least 150 pixels of breadth.*

*Banner : Horizontal ad, of which the height is less than 100 pixels and the breadth is greater than 150 pixels.*

***Interested in studies?***

*Receive by e-mail at a chosen frequency a summary of the advertising activity you are interested in. How the sector evolves, its key players, best sites, media planning indicators, formats and creatives being used. Receive all the informations about an advertiser, a site in one country or in Europe.*

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