

International advertisers on the Internet in Europe : Who are they ? Which strategy do they have on the Internet ?

October 16th, 2001

Internet is undoubtedly a global media, the origine from where people get connected does not really matter and it is in fact the whole essence of the medium to provide an unlimited content to anyone in the world.

Local languages have raised one of many barrier though and more so, the Internet consumers seem to be seen by advertisers as locals.

Above all except for a few specific sectors, international campaigns take the advantage of a global medium and benefit from a large coverage but the messages delivered remain very local and the creative are not just translated into different languages, they fully adapt to the markets they target.

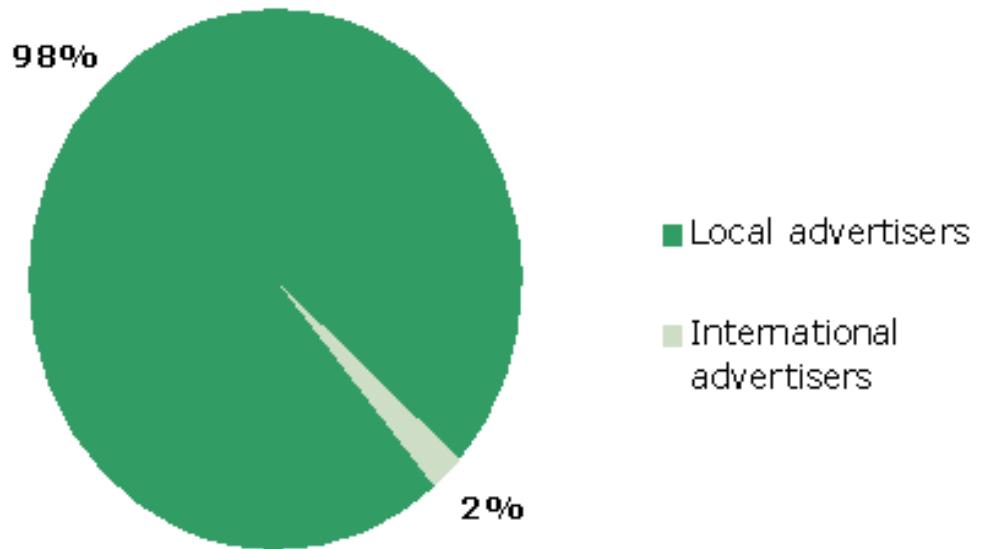
Content	I	- International Advertisers on the Internet : - Who are they, which markets do they target most in Europe and which sector do they belong to ?
	II	- International campaigns : Do they differ from local ones in terms of number of sites, duration and number of banners used ? Do they give priority to international players into the site selection or does the media planning remain local ?
	III	- International Creative : does a global medium available to global advertisers make consumers a global target ? Analysis of two opposite case studies, Hewlett Packard's promotion campaign run from April to July 2001 and the launch of the New Mini Cooper in Europe in last September 2001



➔ I - International Advertisers:



Out of the 35, 000 on line advertisers identified by LemonAd in Europe from January 2001, just 2% can be considered as International advertisers(campaigns run in more than 5 markets)



They are mainly **Computers companies**, companies providing Corporate & Consumer Services on the Internet or e-commerce sites specialised in selling books & cds.

Sectors where international advertisers issue advertise	Nb of international advertisers
Computing / Computing providers, services (ISP..)	72
Corporate services (Advertising agencies, sales houses...)	71
Editorial/content sites / Consumer services	70
Editorial/content sites / Specialist interest	67
e-commerce/shopping / Specialized e-commerce (books,cds...)	52

The main countries where they advertise are as a priority the top 5 European markets followed by Sweden, Belgium, Denmark and The Netherlands.

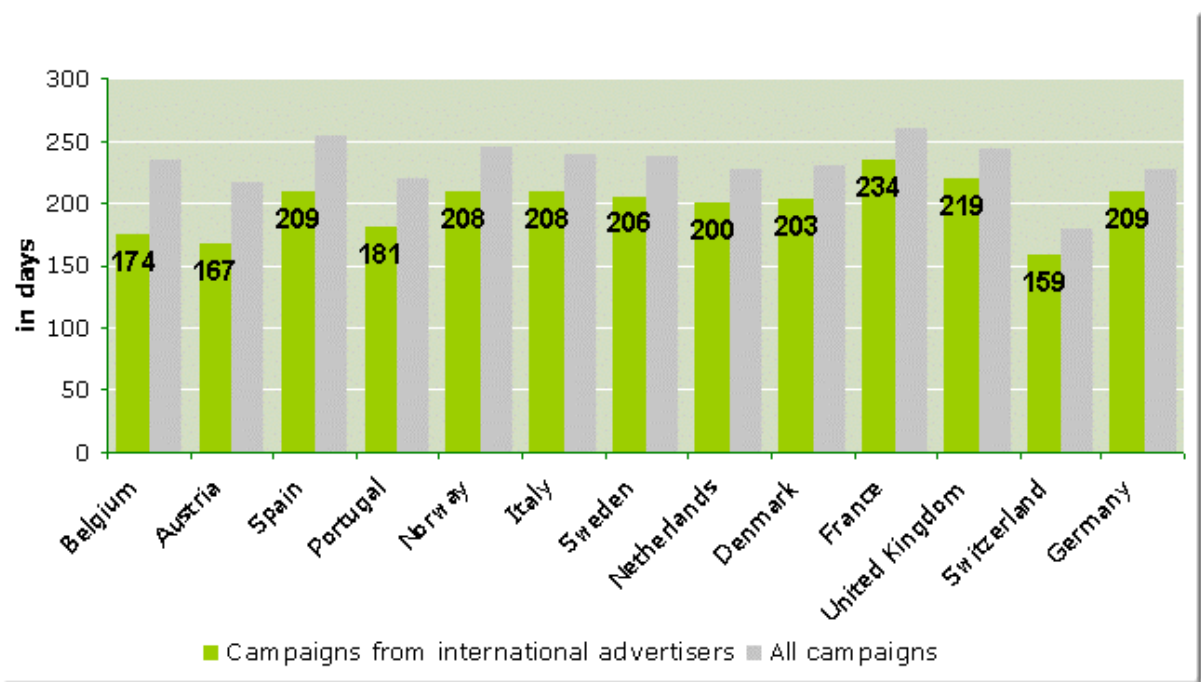
Country	Nb of international advertisers
United Kingdom, Spain, Italy, France, Germany	748
Sweden	464
Belgium	369
Denmark	352
Netherlands	311

➔ II - International Campaigns:

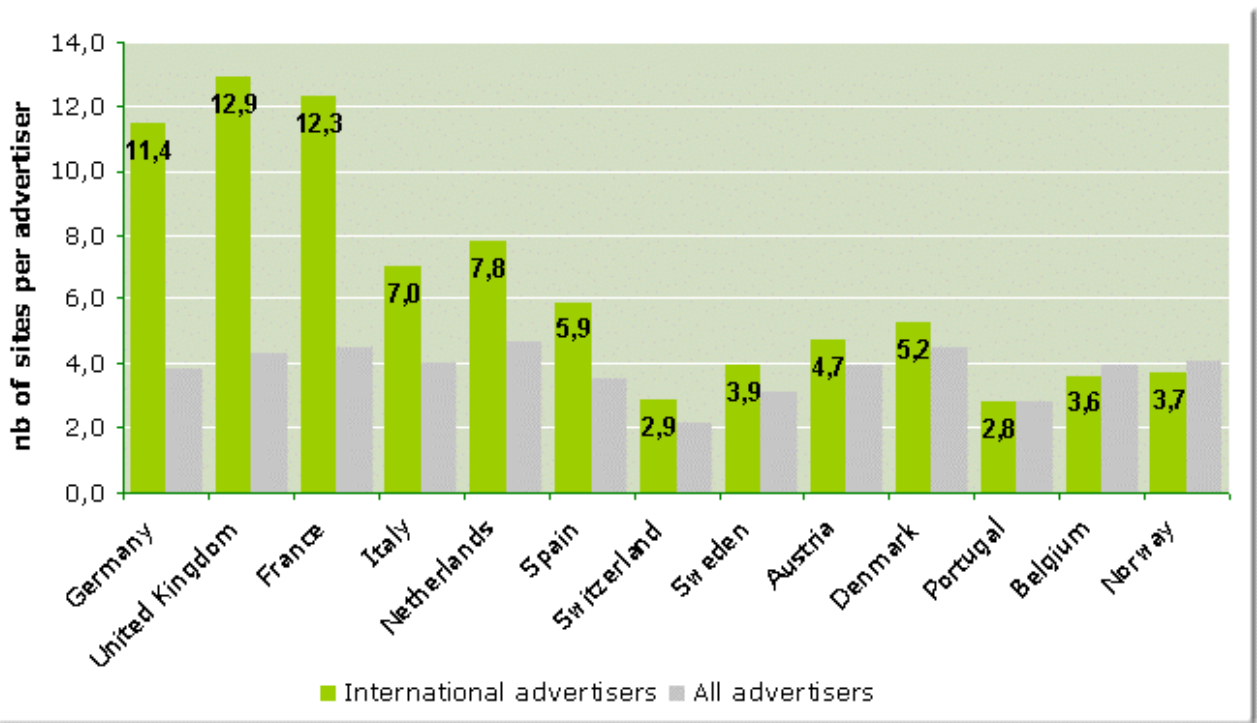


In most countries, international campaigns are shorter than local ones : they run over 2,5 months on the average versus 3.5 months for for all campaigns in general; this being even more marked in smaller markets such as Switzerland, Austria, Belgium and Portugal

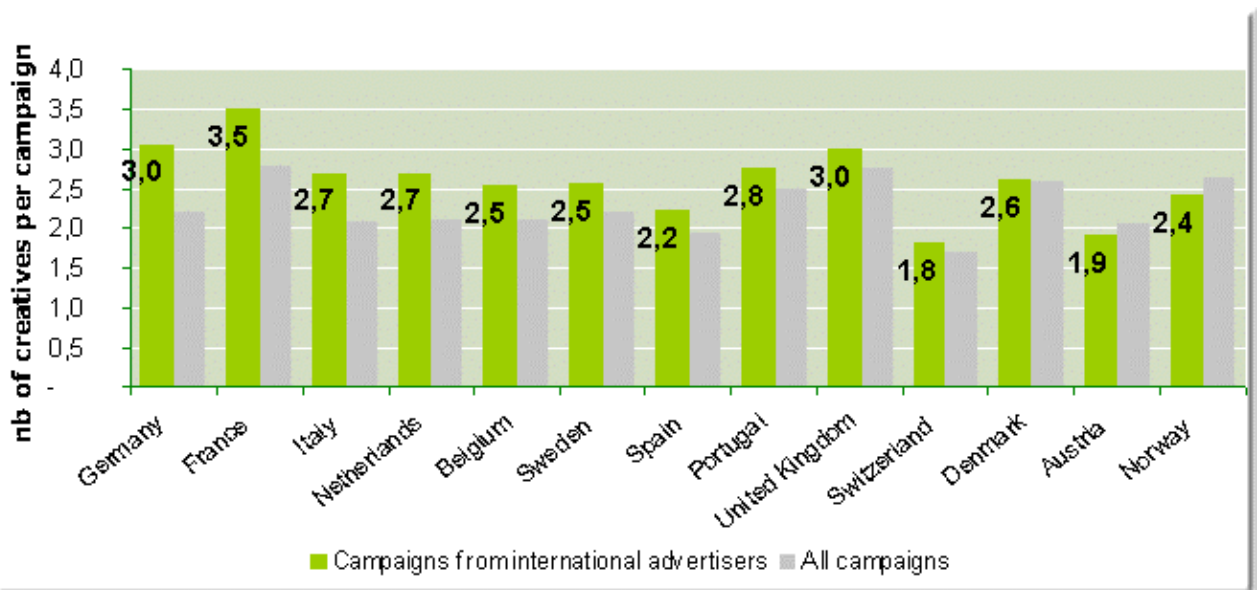
Average duration of a campaign



On the average, International campaigns include more sites than local campaigns; this being even stronger in top 3 European markets : France Germany and UK where the number of sites included in International campaigns is three times higher than for local campaigns



Despite a higher number of sites, international campaigns run approximatively the same number of banners as local campaigns : between 2 and 3 banners on the average per campaign.



Are International sites selected as a priority into international plans ?

The Amazon Case Study

Amazon has used 175 sites as a total in their international campaigns from the beginning of the year; the campaigns have run on a total 12 markets in Europe.

Not more than 25% of the sites were international sites.

Who are they ? Mainly local adaptations of international brands and concepts within the category of search engines & portals.

Sites	Number of countries where they were included into the media plan	
MSN	8	Austria, Belgium, France, Germany, Netherlands, Sweden, Switzerland, United Kingdom
Yahoo	6	Denmark, France, Germany, Norway, Sweden, United Kingdom
Excite	5	Denmark, France, Italy, Norway, Spain
Altavista	4	France, Germany, Spain, Sweden
AOL	3	France, Germany, United Kingdom
ZDNet	3	Germany, Italy, United Kingdom
Bloomberg	2	Germany, United Kingdom
Eurosport	2	Germany, United Kingdom
Infoseek	2	Austria, Germany
MTV	2	Germany, United Kingdom
Others	138	(sites included into one country only)
Total	175	

→ III - International Creative:



International Creative :

Analysis of two opposite case studies : a Hewlett Packard's promotion campaign run from April to July 2001 and the Mini Cooper's launch in last September.

Advertiser:	HP						
Period:	April 18th - August 1st						
	Austria	France	Germany	Italy	Portugal	Spain	United Kingdom
Number of sites	2	41	3	3	1	1	2
Number of Ads	2	25	15	3	11	6	18

Advertiser:	Mini Cooper				
Period:	Since September 3rd				
	Austria	Norway	Sweden	Switzerland	United Kingdom
Number of sites	14	4	4	9	43
Number of Ads	10	3	1	4	13

On all other criteria the two cases were dramatically different:

The promotion campaign run by Hewlett Packard during the summer was a BtoB campaign with a limited list of sites per country (except for France) and all very much targeted at businessmen; the New Mini Cooper's was definitively targeted at a broader group of consumers with a list of various sites including economic sites and sites targeted at youth or women.

**Creative examples of
the Hewlett-Packard's promotion campaign**

France



paris – londres

Germany



London – Berlin

United kingdom



london – paris

Italy



roma – parigi

Creative examples from
the Mini-Cooper's launching campaign

United Kingdom



Norway

LYST PÅ EN NY MINI?

Sweden

Din puls är nu:
— 98

DU HAR LITE
FÖR HÖG PULS.
ANTAGLIGEN ÄR
DU SPÄND INFÖR
LANSERINGEN
AV NYA
MINI COOPER
DEN 22
SEPTEMBER!

MINI COOPER

Switzerland



In terms of creative also interestingly the two cases were completely opposite. Despite few local adaptations, the Hewlett Packard's banners were exactly the same in every market in fact; on the contrary, except for "a little red car represented" in every market, the Mini Cooper's creative were very different from one country to another.

CONCLUSION:

As in any other medium, the creative is local when the product is local; on the Internet, even in sectors where players are multi - national companies as in the car sector, when the product is local, targeted at local consumers, whatever the medium the creative remain locals.

Internet is by definition a global medium but will not contradict this old fashioned reality that we all are individuals leaving in a global market.

Methodology :

The above study is based on the following universe.

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

Period: January 1, 2001 to September 30, 2001.

Perimeter: 2 800 monitored sites, 150 000 monitored pages, 520 keywords monitored on 143 search engines.

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