



Online advertising results

First half of the year 2001

24/07/2001

Online advertising results for the first half of the year clearly reflect the differences that still exist between the European advertising markets on the Internet. Italy, Germany and the United Kingdom have kept the lead over the other studied countries, in terms of number of advertisers and banners displayed. However, the slowdown in online advertising from March onwards has affected all countries across Europe.

The concentration of the advertising activity on the bigger portals (AltaVista, Excite, Yahoo...) remains constant with regard to last year.

The famous dotcoms such as Amazon, Ebay or Tiscali were the most visible on the web as well as the Internet brands of advertisers such as Lycos, BOL or IOL.

On the other hand, the communication strategy of the advertisers shows a surprising consistency in media planning data across Europe and a very low interest in using the new technical ad formats.

Content	I	- European market from January 2001 till June 2001
	II	- Site, advertisers and fields of activity
	III	- Media planning
	IV	- Ad formats



See définitions and methodology



I - European market from January 2001 till June 2001.



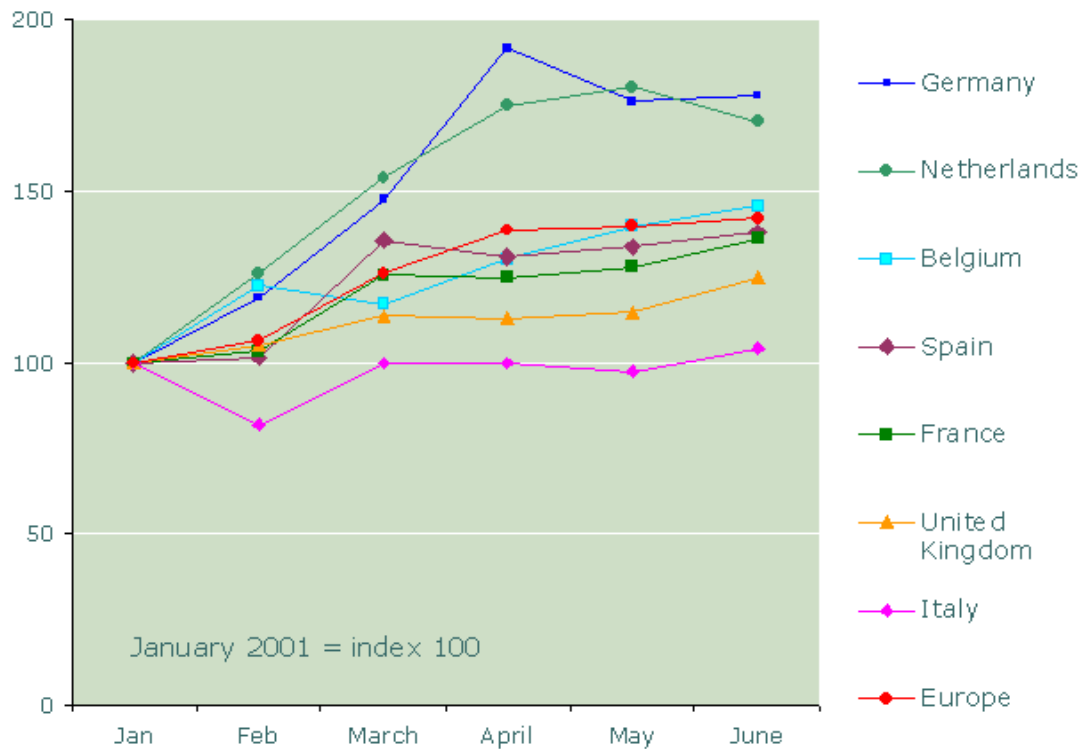
European market - Accumulation January-June 2001

Italy, United Kingdom, Germany, Spain and France represent 80% of the European market.

	Number of campaigns		Number of advertisers		Number of ads	
Italy	16 235	19%	5 745	20%	31 877	16%
United Kingdom	16 072	19%	5 231	18%	44 684	23%
Germany	14 917	18%	5 424	19%	31 619	16%
Spain	13 414	16%	4 904	17%	24 615	13%
France	10 209	12%	3 167	11%	27 441	14%
Netherlands	4 757	6%	2 194	8%	10 005	5%
Sweden	4 394	5%	2 204	8%	9 627	5%
Austria	3 974	5%	1 836	6%	7 710	4%
Belgium	3 900	5%	1 477	5%	8 435	4%
Denmark	3 794	4%	1 785	6%	9 224	5%
Switzerland	3 491	4%	1 568	6%	5 896	3%
Norway	2 442	3%	1 205	4%	6 471	3%
Portugal	1 281	2%	629	2%	3 154	2%
Europe	84 881		28 469		196 729	

Number of advertisers evolution

After March, the number of advertisers becomes rather stable in Italy, UK, France and Spain.



 **II - Site, advertisers and fields of activity.**



The main sites in Europe

In number of ads displayed, we hereby find the big European portals.

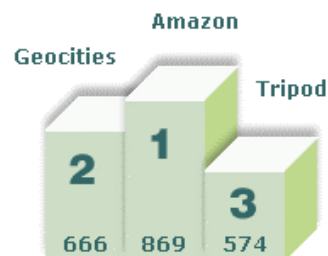
Top 10 of sites in number of ads	
Site	Number of ads
Italia Online*	3 278
Altavista Germany	2 962
Excite United Kingdom	2 498
Autonline	2 391
Netscape United Kingdom	2 174
MSN United Kingdom	2 010
Yahoo United Kingdom	2 009
Altavista Spain	1 899
Lycos France	1 879
Compuserve United Kingdom	1 874



The main advertisers in Europe

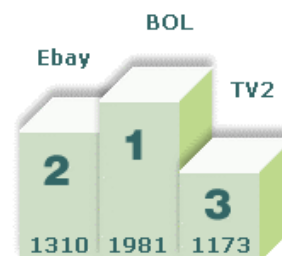
The main advertisers are those who communicate in several countries (Amazon, BOL, Tripod, Tiscali...) and/or those who are classified as multi-activity sites (Tiscali, IOL, IBM...).

Top 10 advertisers in number of campaigns	
Advertiser	Number of campaigns
Amazon	869
Geocities	666
Tripod	574
BOL	456
Tiscali	445
IOL*	401
Ebay	346
Lycos	318
elfoco	275
IBM	251



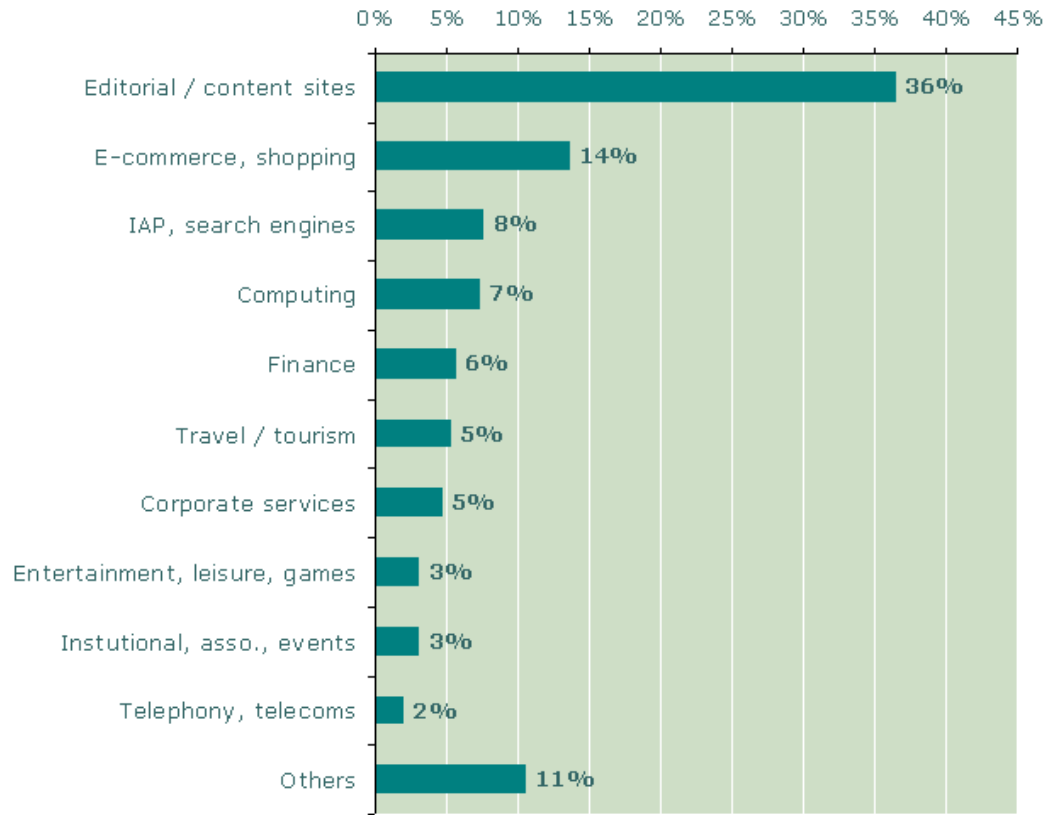
* The advertiser IOL includes several brands from Italia Online : Arianna, Libero, Digilander and Mall.

Top 10 advertisers in number of ads	
Advertiser	Number of ads
BOL	1 981
Ebay	1 310
TV2	1 173
Bet Sports	982
Amazon	927
StepStone	794
Lycos	755
IBM	708
Dell	674
Tripod	674



The break down in number of campaigns into fields of activity

The break down in number of campaigns into fields of activity shows hegemony of editorial/content sites and advanced sectors; while traditional sectors stay flat.



The break down into fields of activity in each country

When we see for each country the first three fields of activity, there is no big difference. Editorial/content sites take the lead followed by e-commerce, shopping, IAP and computing. In some advanced countries (Denmark, Norway and UK) travel/tourism and finance appear in top.

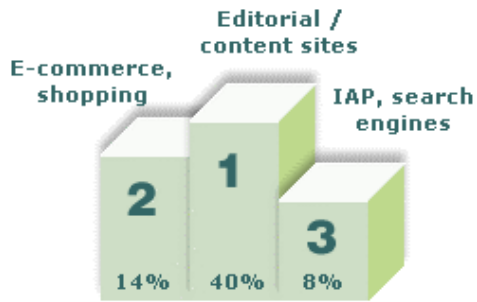
The only difference is the repartition in percentage through the sectors: for example, in Italy 49%, 9%, 9% and in the United Kingdom it's more well-balanced 27%, 20%, 9%.

Click on the flags for a quick access to each country :





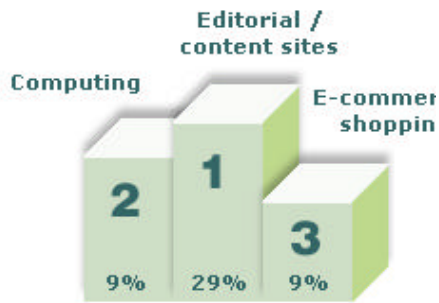
FRANCE



ITALY



NETHERLANDS



NORWAY



PORTUGAL



SWEDEN

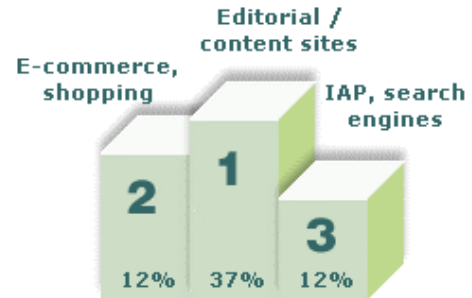




SPAIN



SWITZERLAND



UNITED KINGDOM





III - Media planning.



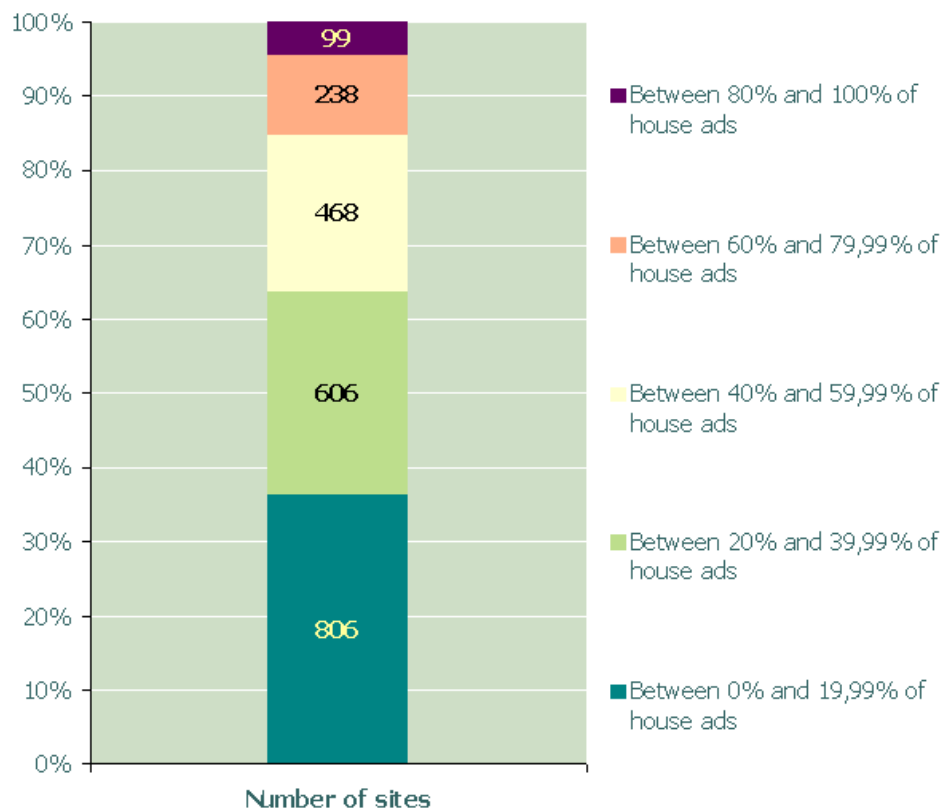
Media planning indicators

The media planning indicators show no striking difference between countries. Averages are around 3 campaigns per advertiser, each campaign having its 2.3 ads displayed on 3 sites.

	Nb campaigns/ advertiser	Nb ads/ campaign	Nb sites/ campaign	Average duration of a campaign	Average duration of use of a ad
Sweden	2.0	2.2	2.4	34	22
Norway	2.0	2.6	3.2	42	35
Portugal	2.0	2.5	2.4	53	31
Denmark	2.1	2.4	3.1	34	18
Netherlands	2.2	2.1	3.0	38	24
Austria	2.2	1.9	2.8	32	23
Switzerland	2.2	1.7	1.7	28	27
Belgium	2.6	2.2	2.4	32	27
Spain	2.7	1.8	2.3	23	21
Germany	2.8	2.1	2.6	33	27
Italy	2.8	2.0	2.7	24	23
United Kingdom	3.1	2.8	2.7	33	27
France	3.2	2.7	3.1	32	27
Europe	3.0	2.3	3.0	34	25

House ads

More than 35% of the sites use less than 20% house ads and 35% of the sites use more than 40% of house ads.

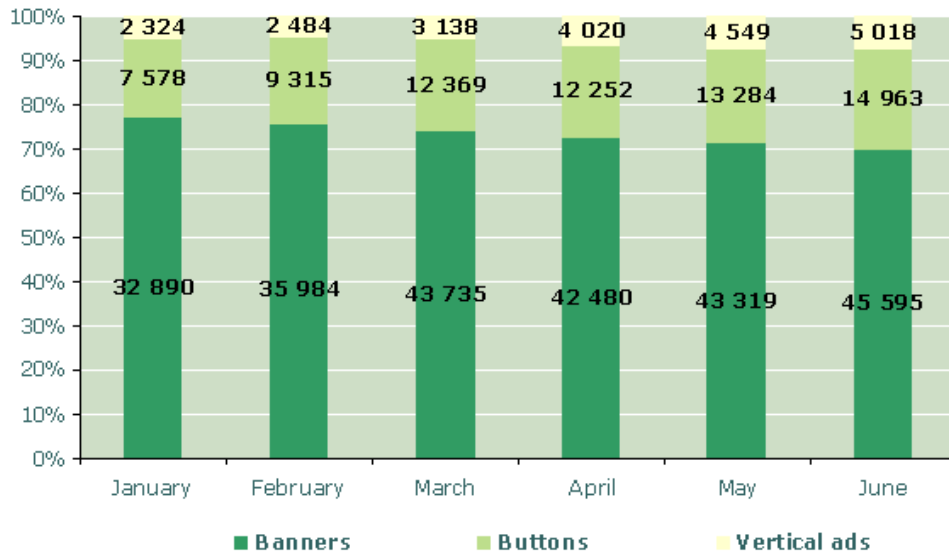


IV - Ad formats.

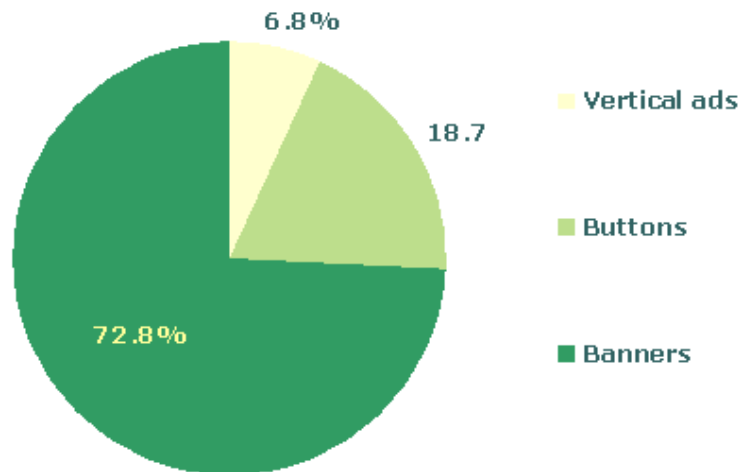


Ad sizes

Banner size remains the most used. Even if the number of vertical ads is not very important in comparison with the number of banners, it increases since January.

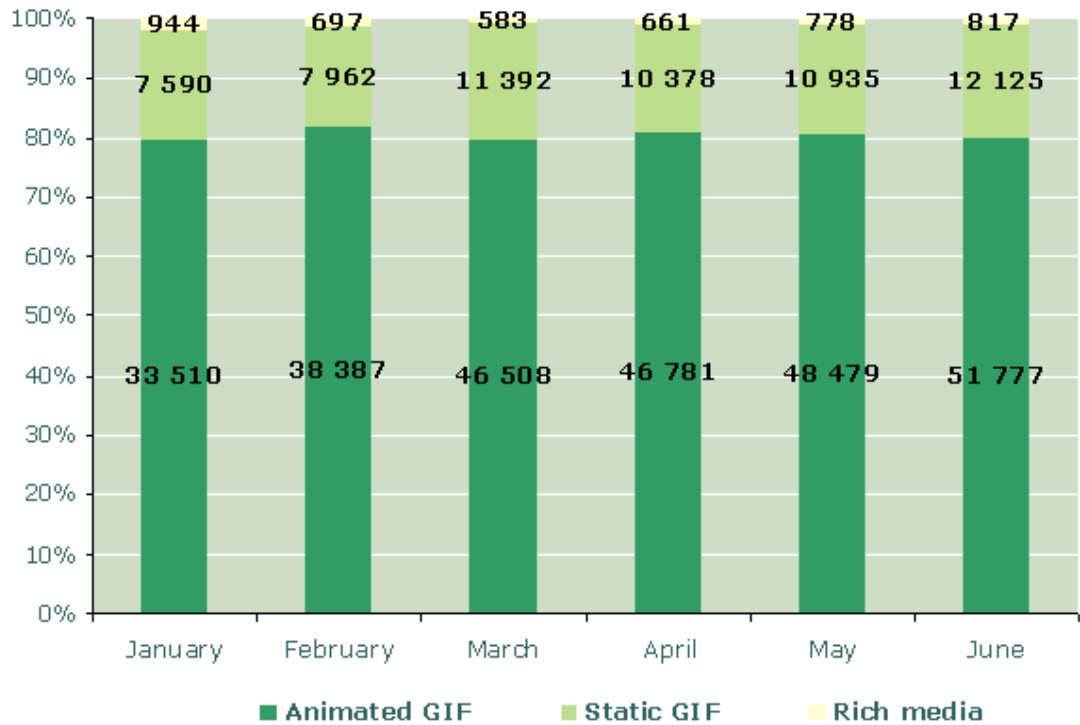


Ad sizes repartition

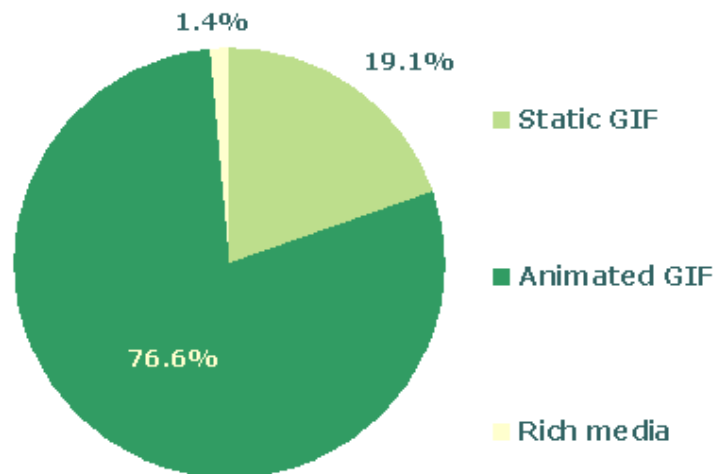


Ad technical formats

New technical formats, HTML and Flash, are still confidential. There is not a real development of rich media ads; animated GIF is the most used.



Ad technical formats repartition



Methodology :

The above study is based on the following universe.

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

Period: January 2001 to June 2001

Perimeter: 3 242 monitored sites, 138 635 monitored pages

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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