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## 6. Internet

December 2001

# 6.1. Introduction

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- Internet has introduced itself quite recently as a medium type of its own, developing more or less rapidly throughout all European countries. The relatively “new aspect” of this medium has given the market very little time to fully organise itself in terms of market analysis and reporting. Furthermore, the relatively small revenue generated by this medium in small markets - compared to major European countries - does not encourage players to invest too hastily.
  - For example, in Belgium, figures pertaining to media investments have started appearing thanks to independent organisations such as the IAB (regrouping the main online market players from media sales houses, advertising media centres and agencies as well as advertisers). Audience figures have been accessible mainly since 2000, a period considered as the beginning of a real movement.

# 6.1. Introduction

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- Audience measuring companies initially chose to establish themselves in huge marketplaces as more and more advertisers were beginning to embrace the Internet, investing larger advertising budgets than small markets.
  - International players such as international research agencies do consider some countries to be too small -and non profitable- to be integrated into their research.
  - As some countries lack measurable audience figures, many advertisers hesitate to consider this new medium in their strategies.
  - The battle between survey agencies is as fierce as the battle between web sites: huge discrepancies can be found amongst all data collected on the market, especially in terms of audience measurement.

# 6.1. Introduction

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- In these rough times, almost every web site hopes to enjoy a certain amount of revenue from online advertising in order to face the current shortness of investment funds most of them are undergoing
- Advertising-revenue based financial models are actually failure-oriented, as the “advertising pie” remains limited in comparison to the everyday emergence of new web sites
- The market tends to become more professional by building up advertising standards in order to avoid the “chaos” period experienced over the past few years: independent and certified organisations tend to extrapolate from the rules that have been laid down in other medium types and apply them to the online advertising world

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# Internet : Belgium

## 6.1. Introduction

# 6.1. Introduction

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- Belgium ⇒ comments:
  - No distinction has been made between Northern and Southern Belgium, as many Belgian web sites offer both French and Dutch versions of the information provided (even English may be available)
  - No distinction is given between laptop and fixed connections
  - No distinction is made between duration for professional or private use in terms of audience
  - Belgium's slowness in terms of advertising investments can be partially explained by the average media cost enforced on this territory, compared to the European average

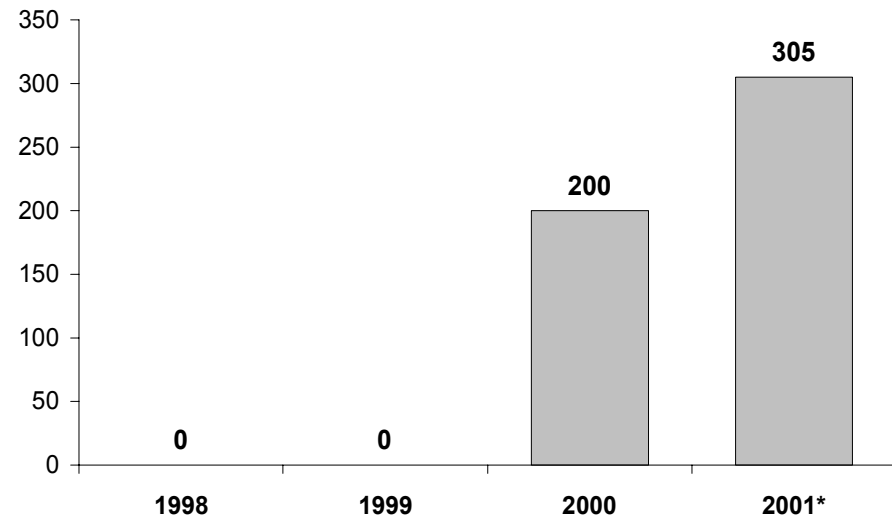
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# Internet : Belgium

## 6.2. General indicators

# Number of sites allowing local ad messages

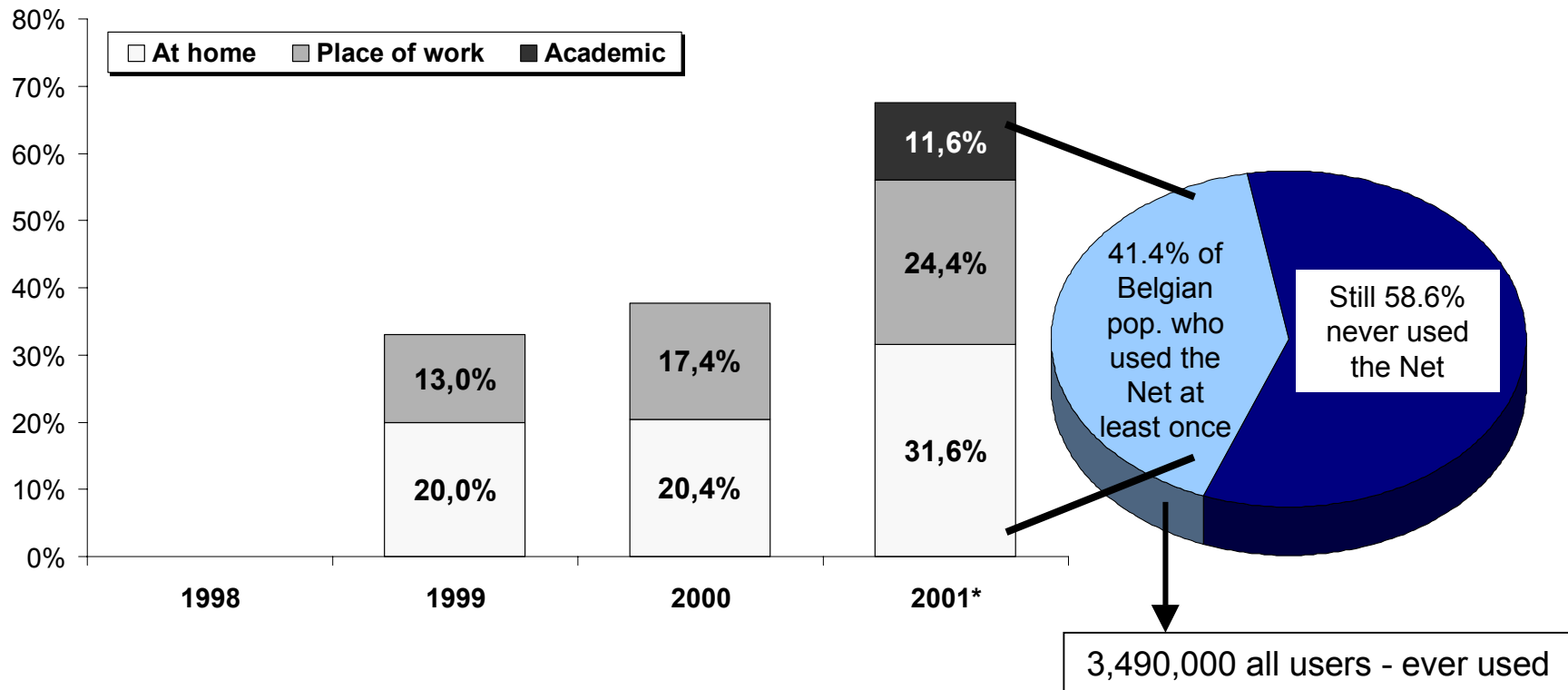
- Are taken into account: web sites represented by integrated/ global media sales house (no exchange carousel)
- Estimates remain rough, as the battle to win/lose web sites never ends for sales houses, and the battle to survive for a web site is even tougher!



- Emergence of “disconnection” purchase  $\Rightarrow$  “.be” surfers bought from international web sites
- Continuous increase of advertising-supporting web sites (professionalisation of support) and better representation towards advertisers and agencies

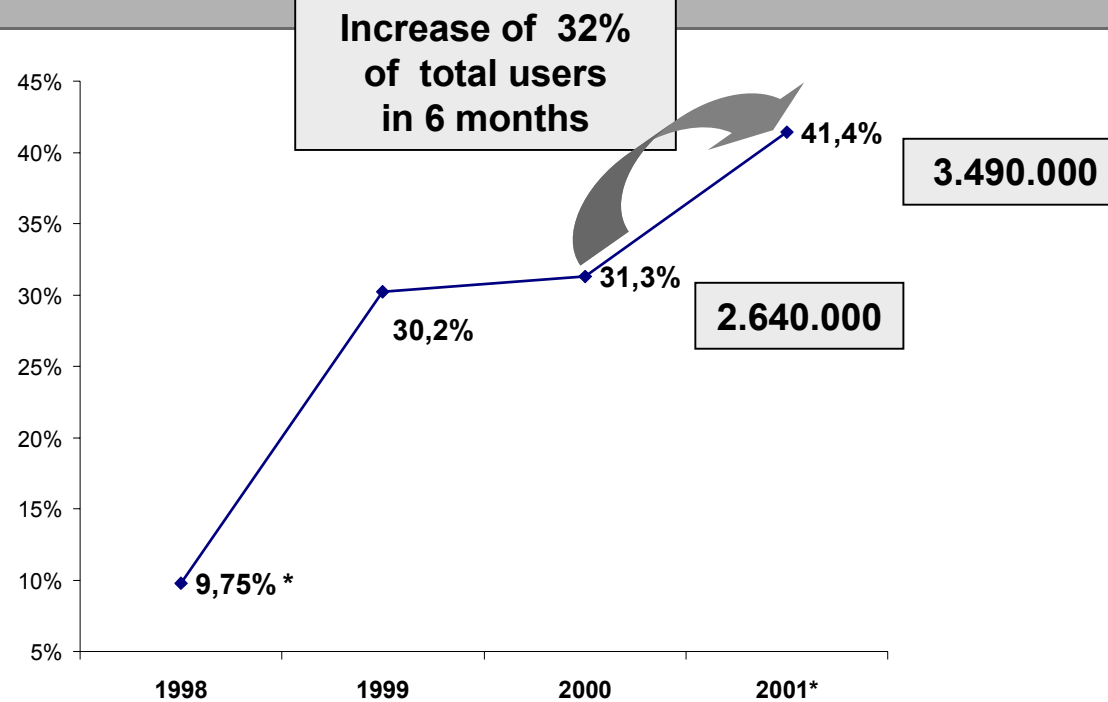


# Number of Internet connections (PC/Mac)



- Represent a total number of 5,701,586 available connections (dupl. incl.)
- Increase of 32% of Internet users who used the Net at least once since end 2000

# Internet users (all users 15+ ⇒ “ever used”)

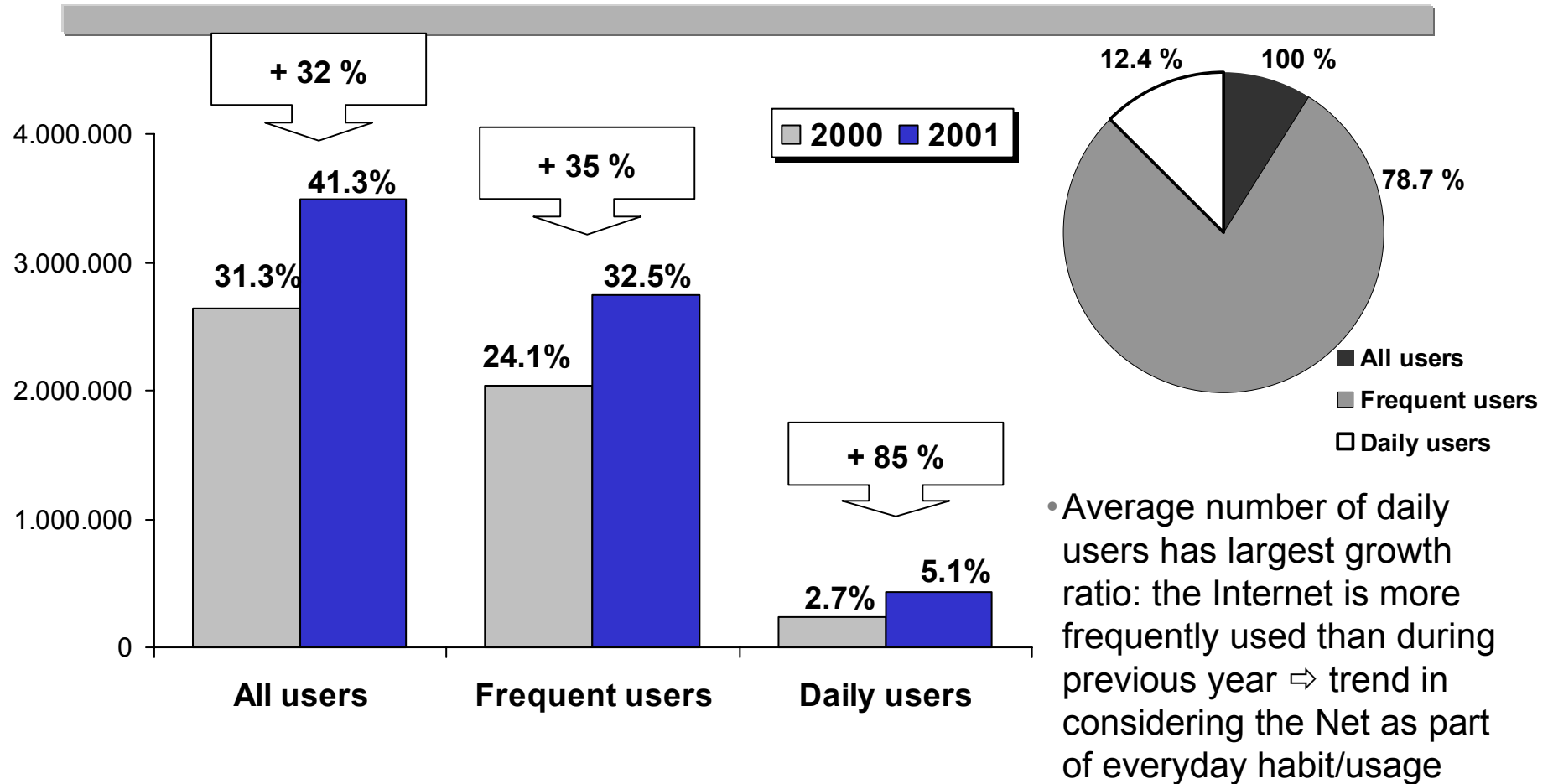


- 2000 was considered as the first year of growth slowdown; but end 2000- beginning 2001 showed out that the internet has found a new lease of life ⇒ many new users have made their first steps on the net over a 6-month period

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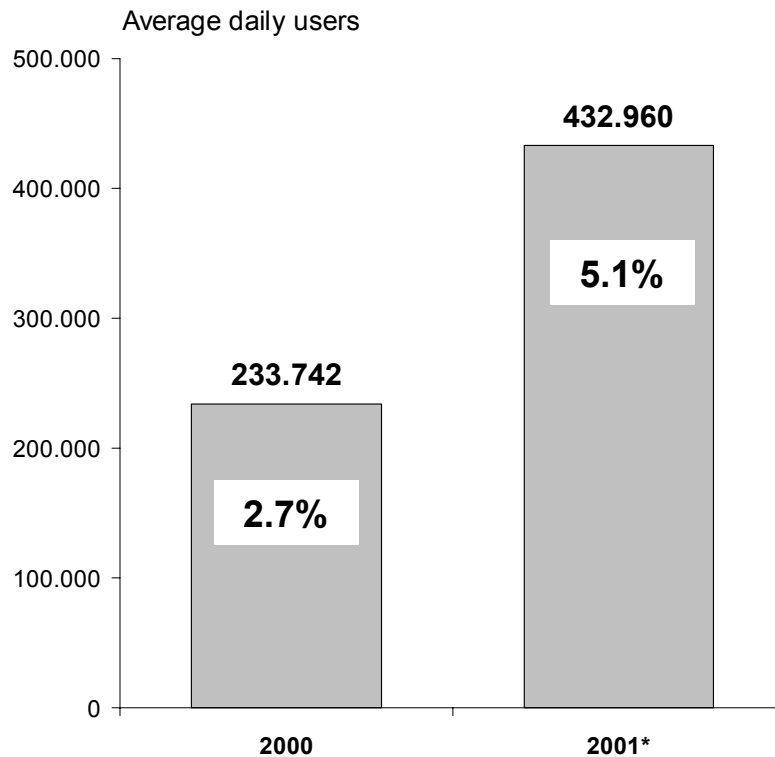
## 6.3. Audiences

# Usage frequency ...



# ... and media consumption

Source: Bim- Insites & Metriweb  
(% of Tot. Pop. 15+)

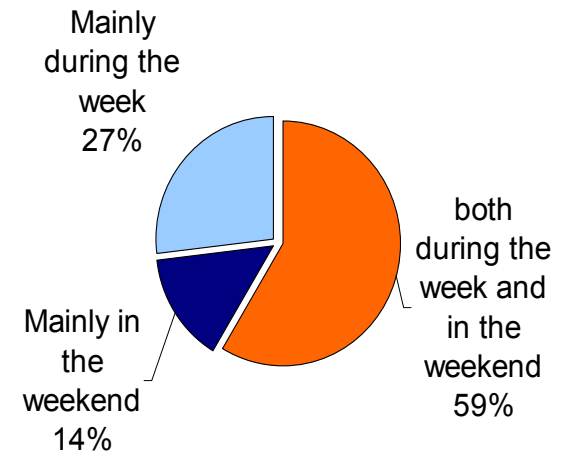
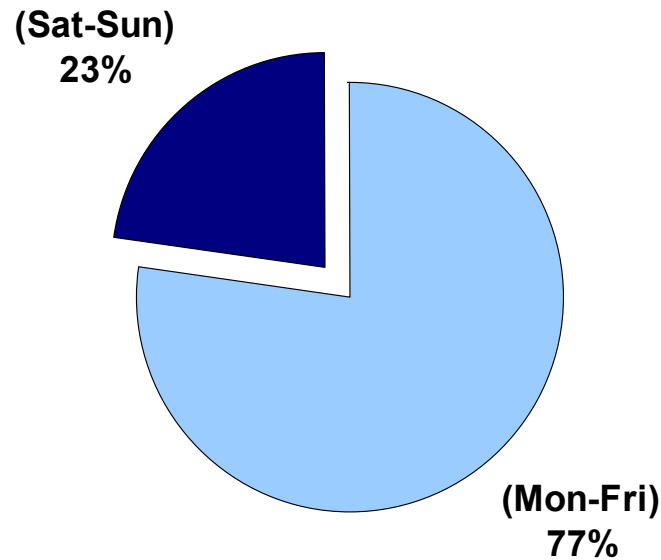


	2000	2001
Average daily pages viewed/user	11	12
Average daily impressions/user	N.A.	11
Average daily duration on Web/user	1H 22	1H 09

*No distinction can be made for duration of surf between Home and profesional usage*

- Time spent online decreases:
  - surfers know exactly what they are looking for
  - new subscribers seem to spend less time online than regular users
  - random surfing is decreasing: goal-oriented search is predominating

# Proportion of page views - Week vs WE



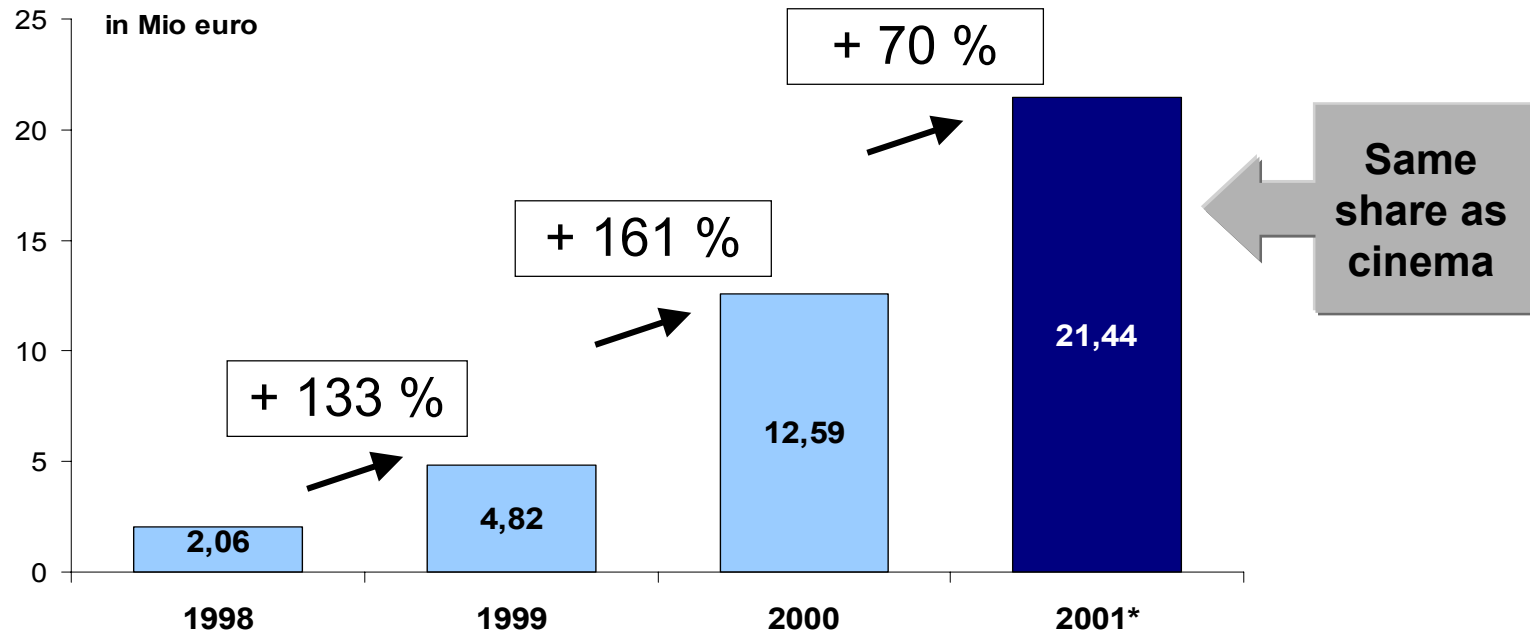
- Amount of pages viewed is clearly predominant in weekdays compared to WE's
- No predominance emerges with regard to the time of use, but overall trends show the number of pages viewed is higher during the week (people spend more time online)

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## 6.4. Media investments

# The era of triple-digit growth has come to an end

Advertising expenditures - in Mio euro



- Growth is affected by several factors:
  - the embrace (or lack thereof) of web adv. by traditional marketing companies
  - the growth (or lack thereof) of dot-com companies and their ability to invest web ad money
  - the evolution of technology (broadband, wireless, Interactive TV, ...)



# Investments per creative format

	1998	1999	2000	2001*	Growth Index 99-00
Investments per year	2,07	4,82	12,59	n.a.	161

## INVESTMENTS PER CREATIVE FORMAT

	1998	1999	2000	2001*
Standard banners	98,8%	97,8%	80,0%	n.a.
Pop-ups	0,1%	0,1%	0,1%	n.a.
Keyword search	n.a.	n.a.	2,5%	n.a.
Newsletters / Ad e-mails	n.a.	n.a.	0,5%	n.a.
Rich media	n.a.	n.a.	11,2%	n.a.
Interstitials/ Superstitials	n.a.	n.a.	0,0%	n.a.
Advertorials / page sponsoring	1,2%	2,0%	5,2%	n.a.
Other (referrals, classifieds, ...)	n.a.	0,1%	0,6%	n.a.

- Ad banners remain the primary advertising vehicle, but with time and experience new forms tend to appear with increasing success (emergence of Rich Media banners: 11% of investments in 2000)
- Advantage of banner: standard format accepted by all and basic pricing

# Some ways of advertising on internet

The screenshot shows a Microsoft Internet Explorer browser window displaying the website 'Planet Internet Vandaag'. The browser's address bar shows 'http://www.planetinternet.be/nl/vandaag/'. The website content includes a navigation menu with links like 'Nieuws Sport 24 Update', 'Computer Balzen Games', 'Ouders Uw Geld Auto & Meter', 'Muziek Diensten Mine', 'Aanet Loopbaan Shoppen', and 'Wetenschap Chat Festivalzite'. A search bar is present with the text 'Zoek op het Internet via keyword' and a search button. Several advertising elements are highlighted with blue arrows and pink boxes:

- Banner:** A horizontal banner at the top with the text 'Op vrijdag 22 juni alles over festivals en voor 2.500.000 BEF prijzen te winnen' and a small image of a newspaper titled 'Het Nieuwsblad'.
- Skyscraper:** A vertical advertisement on the right side with the text 'Planet Premium + webcam 2.999 Bef.' and an image of a webcam.
- Popup:** A purple popup window in the center-left with a bouquet of red roses and the text 'VONS invite à préparer avec passion Saint-Valentin'.
- Button:** A small advertisement at the bottom right with the text 'Madonna live in Parijs' and an image of Madonna.
- Skyscraper (second):** A vertical advertisement on the right side with the text 'tw% trade' and 'Surf naar www.12trade.be'.

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
<b>24/7 Media*</b>	<b>24/7 europe</b>	<b>Sales house part of an int. group**</b>
<b>Ad2one*</b>	<b>Vivendi</b>	<b>Sales house part of an int. group**</b>
<b>Adlink*</b>	<b>Adlink International</b>	<b>Sales house part of an int. group**</b>
Adnet	Rossel	Local sales house
Beweb		Local sales house
Echonet	Echo	Site owner/ editor
Financial Times		Site owner/ editor
<b>Hi-Media*</b>	<b>Hi-Media International</b>	<b>Sales house part of an int. group**</b>
<b>iBazar*</b>	<b>iBazar Network</b>	<b>Sales house part of an int. group**</b>
IP Netvertising	IP	Sales house part of an int. group
Just for You		Local sales house
<b>MSN*</b>	<b>Microsoft</b>	<b>Sales house part of an int. group**</b>
RMB online	RMB / UGC	Sales house part of an int. group
Timespot	Oneweb	Site owner/ editor
Trustmedia	Trustmedia	Sales house part of an int. group
VAR		Local sales house

\* Pure online international media sales houses

\*\* Part of traditional sales houses



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Internet : France

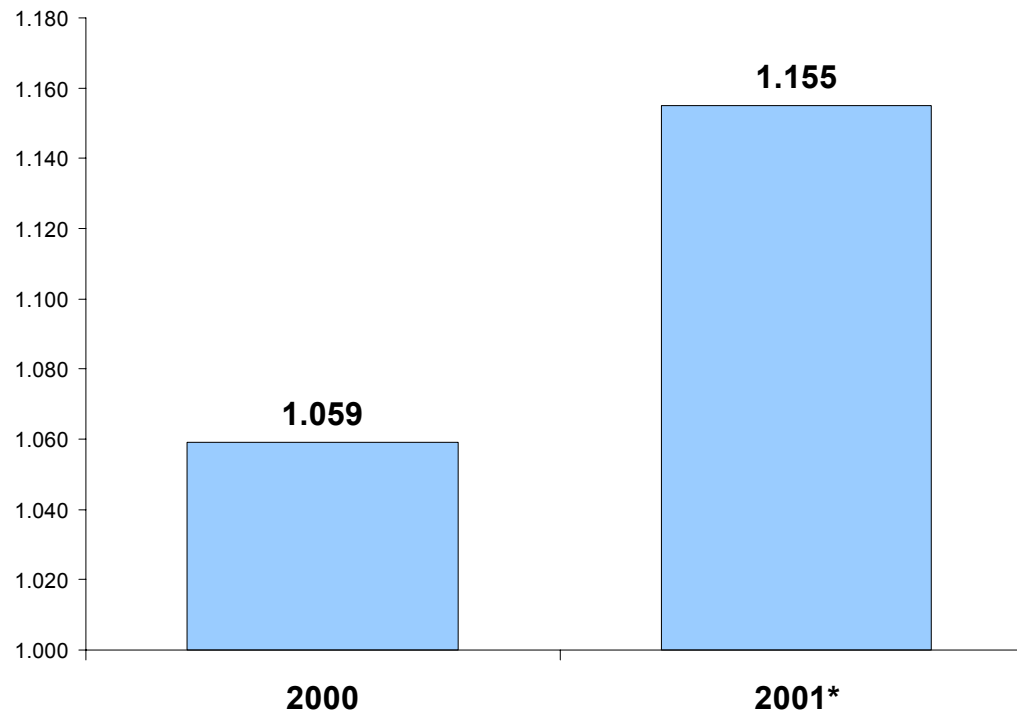
## 6.2. General indicators

# New ads technology's Development

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- France ⇒ comments:
  - The first conclusive organisation of the French market is believed to have taken place late 2000, when media sales houses were the first in attempting to define a clear status for the various players (buyers and sellers) of the French market, and trying to unify selling/buying procedures.
  - Figures pertaining to audience measurement and investments have been available since 1999 - France is a market with a huge potential, and therefore considered 'valuable' for survey agencies.

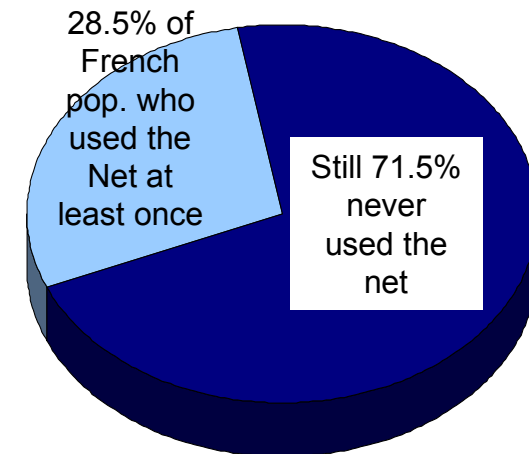
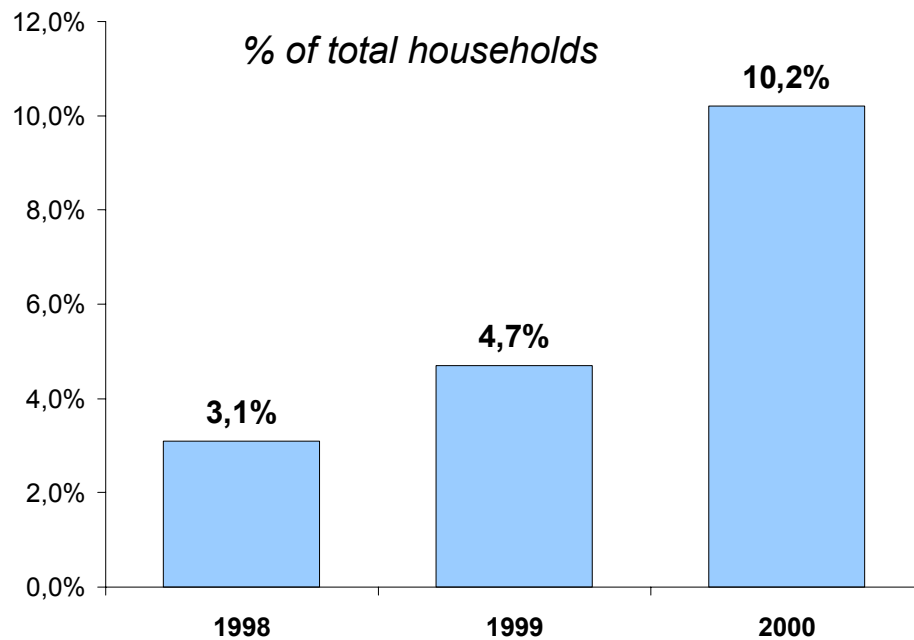
# Number of sites allowing local ad messages



- Package taken into account in measurement: real estimate of number of web sites for 2001 ⇒ 1,050 French web sites

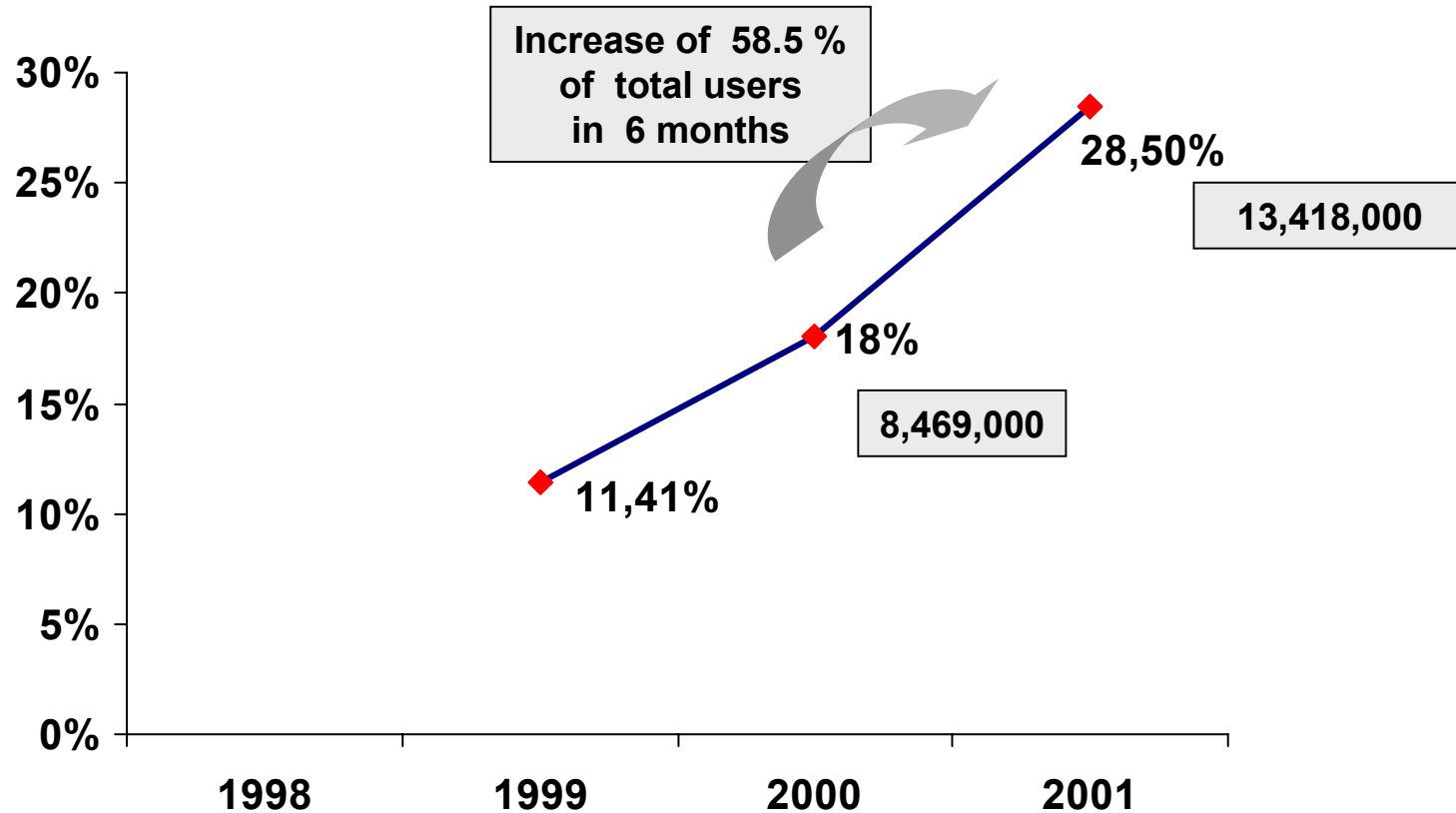


# Number of Internet connections (PC/Mac)



- Representing a total of 2,466,360 households having a connection (no duplication)
- Number of home connections keeps increasing

# Internet users (all users $\Rightarrow$ “ever used” 15+)

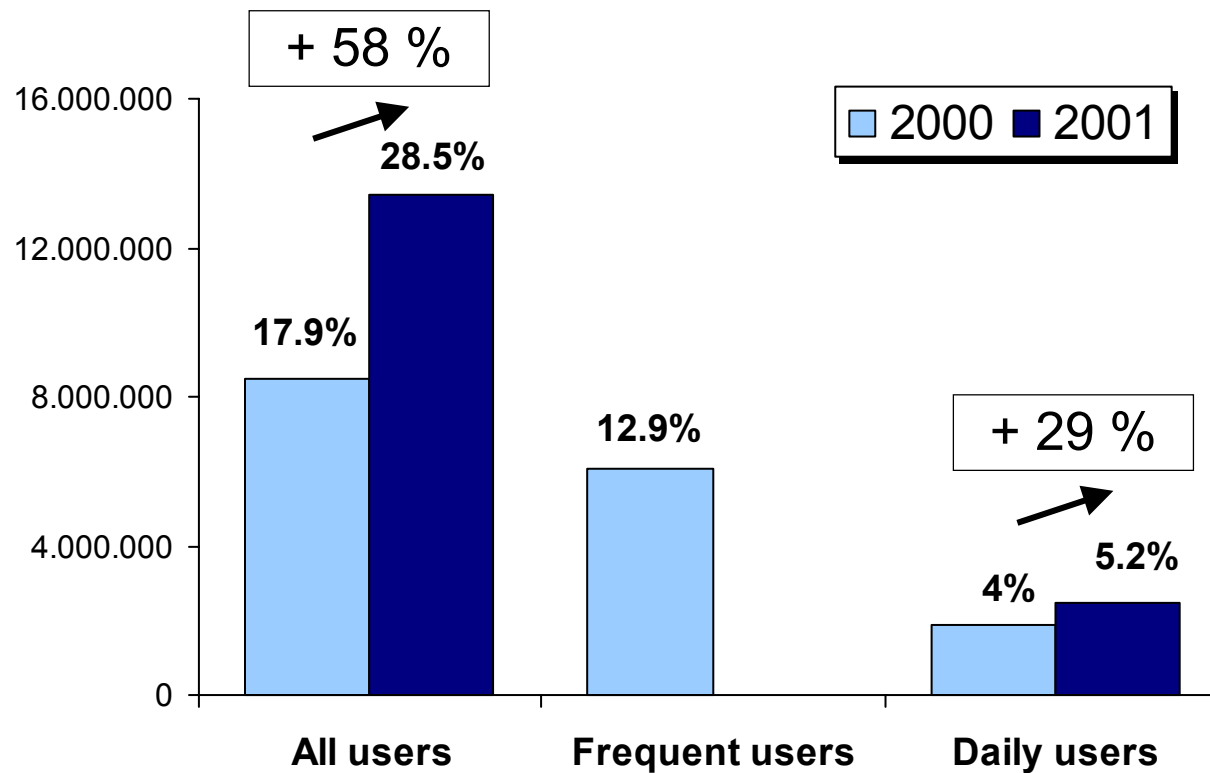


- Linear evolution in years

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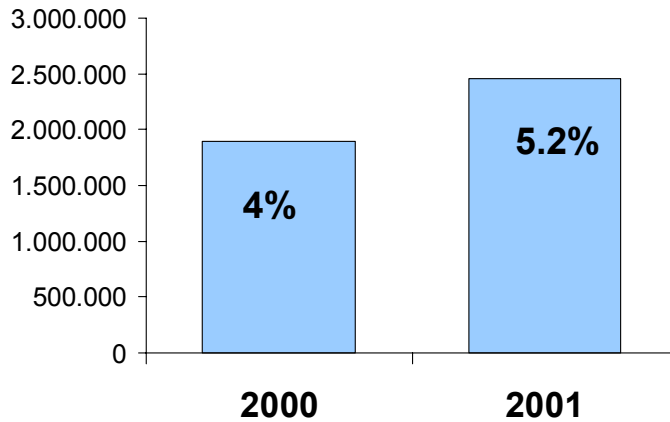
## 6.3. Audiences

# Usage frequency... (15+)



- Proportion of new users is more important than proportion of daily users: not all users are daily internet users !

# ... and media consumption (15+)



Source: MMXI - user centric panel at home

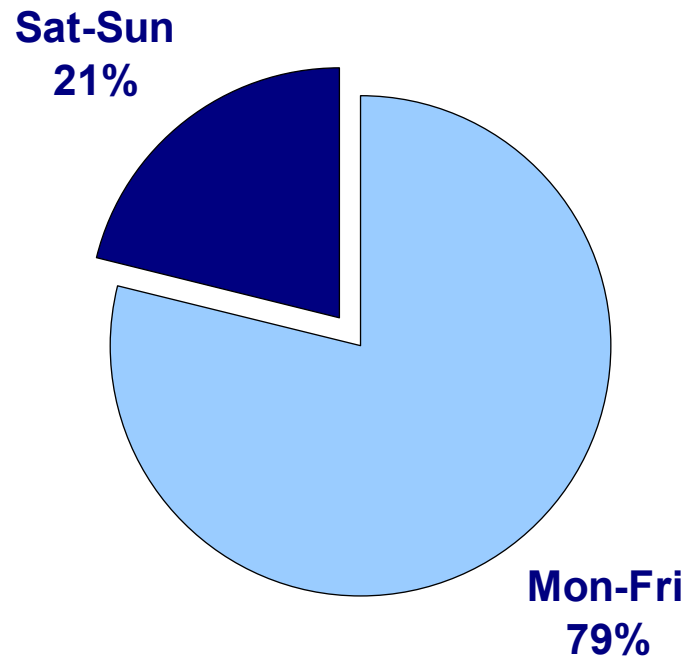
	2000	2001
Average daily pages viewed/user	30,3	31,8
Average daily impressions/user	N.A.	N.A.
Average daily duration on Web/user	0 H 31	0 h 31

No distinction can be made for duration of surf between Home and profesional usage

- Average time spent online remains unchanged: no influence of newcomers or experienced users ⇒ good balance!
- Average number of pages viewed is slightly increasing

# Proportion for pages viewed Week vs WE

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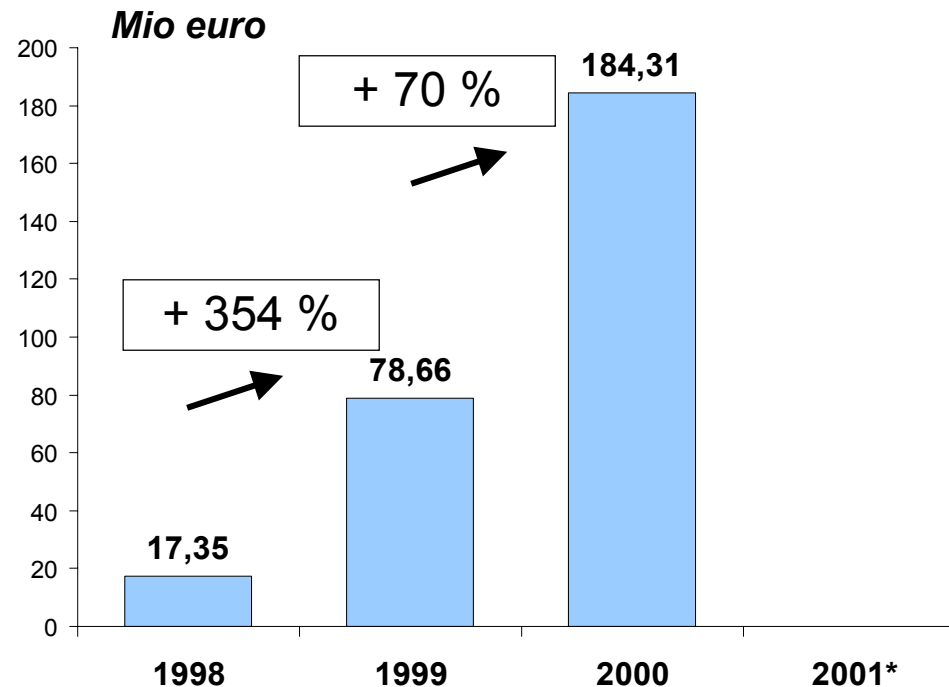


- Amount of pages viewed is clearly predominant during weekdays compared to WE's

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## 6.4. Media investments

# The era of triple-digit growth has come to an end



- No investment estimates available for 2001, but growth-ratio will not be as high as previous years



# Investments per creative format

## MEDIA INVESTMENT (In Space Value & Mio euros)

	1998	1999	2000	2001*	Index 99-00
Investments per year	17,35	78,66	184,31		70%

## INVESTMENTS PER CREATIVE FORMAT

	1998	1999	2000	2001*
Standard banners	91%	87,5%	79%	
Pop ups				
Keyword search				
Newsletters / Ad e-mails			1%	
Rich media				
Interstitials/ Superstitials	0,1%	0,3%		
Advertorials / page sponsoring	6,1%	10,2%	11%	
Others	2,6%	2%	9%	

- Proportion of investments on banner format is decreasing to the advantage of advertorials and sponsoring

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
HI-MÉDIA YAHOO WANADOO RÉGIE	France Télécom	Sales house part of an int. group Site owner/ editor Sales house part of an int. group
ADLINK DOUBLE-CLICK LIBERTY SURF GROUP ADVERTISING RÉSEAU LYCOS	Tiscali Bertelsmann, Terra	Sales house part of an int. group Sales house part of an int. group Sales house part of an int. group Sales house part of an int. group
AD2ONE 24/7 ...	Vivendi	Sales house part of an int. group Sales house part of an int. group

- + impressive list of media owners with integrated sales house (Bouygtel, Au Feminin, Boursier, Batiweb, ...)

# Top 10 web sites France

Property	Unique Audience	Reach %	Time per Person
1. Wanadoo	3.535.744	63,58	0:35:59
2. Lycos Network	2.664.354	47,91	0:39:02
3. Yahoo!	2.261.355	40,67	0:26:13
4. Proxad	2.252.231	40,5	0:16:13
5. Tiscali	2.230.940	40,12	0:14:50
6. Vivendi Universal	2.040.847	36,71	0:18:40
7. AOL Time Warner	2.021.077	36,36	0:21:25
8. Groupe M6	1.806.651	32,49	0:27:22
9. MSN	1.633.286	29,37	0:20:29
10. Microsoft	1.625.682	29,23	0:05:33



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# Internet : United Kingdom

## 6.2. General indicators

# New ads technology's Development

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- UK ⇒ comments:
  - Major problem in trying to take a snapshot of the UK market is draw a clear borderline between UK web sites and other .com web sites (which can be both UK and US owned, or owned by any other country)
  - No exact indication can be given as to the average number of daily Internet users (site-centric indication not measured), but approximately 52% of UK Internet users log on every other day (stated information)
  - No distinction given between laptops and fixed computers
  - No indication can be given on the proportion of investments made by creative format as the market hasn't organised itself to collect such data (an estimated 70% of creative formats circulated by UK advertisers on the www are banner format)

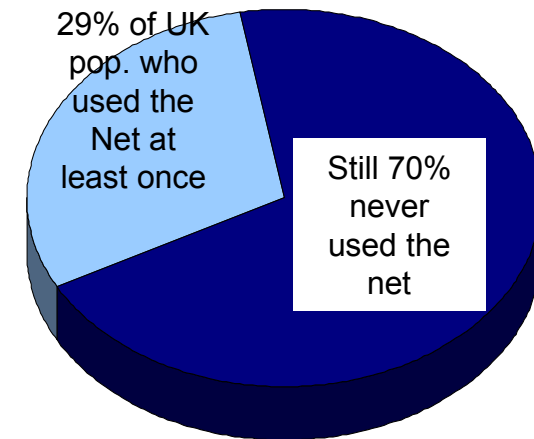
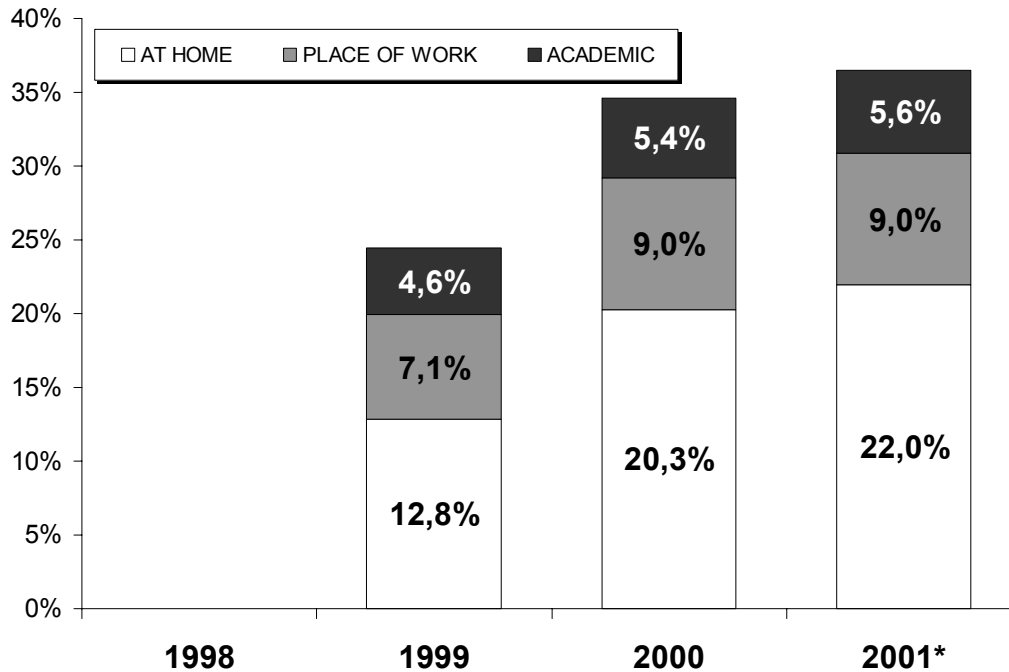
# Number of sites allowing local ad messages

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- Highlighting 100% British web sites is quite impossible, as most .com sites are directed to UK and US users ⇒ geography is dying online, and this is especially true for web sites in English
- 100% British sites can be traced quite logically (ex. BBC.com, ...), but results would be biased ⇒ asking UK web sites to change their URL address in order to group them in 1 of the 2 categories would be undesirable.

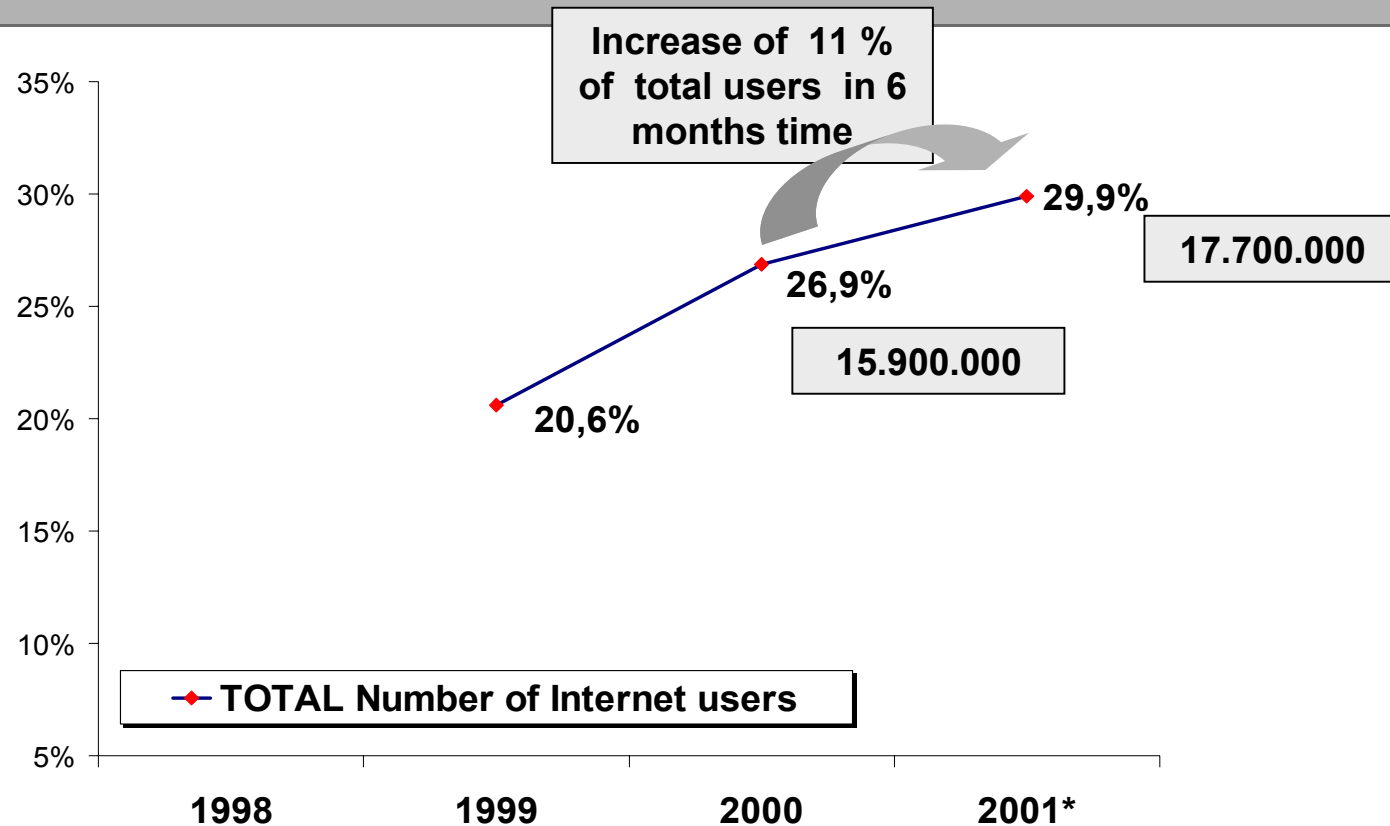


# Number of Internet connections (PC/Mac) - 15+



- Representing a total number of 21.6 Mio available connections (duplication incl.)

# Internet users (all users ⇒ “ever used” 15+)

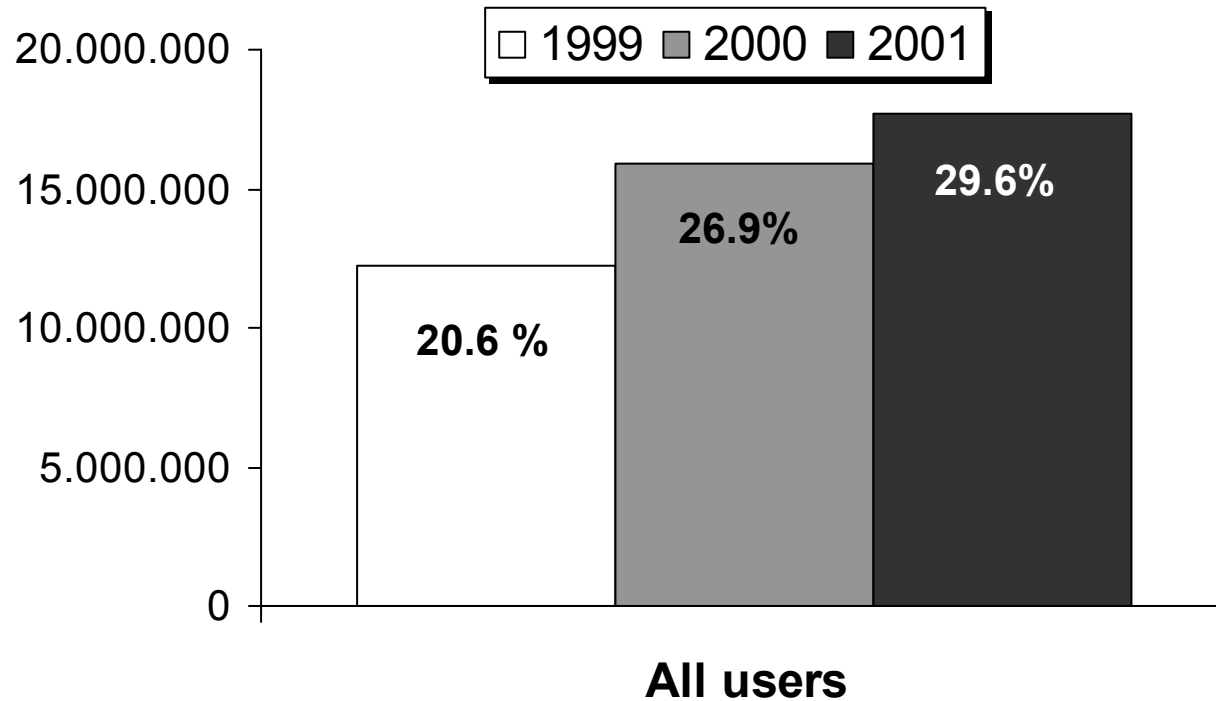


- Linear growth expected for coming years
- Increase of new users is lower than in France and Belgium

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## 6.3. Audiences

# Usage frequency ...



- No indication can be given on average number of daily users online

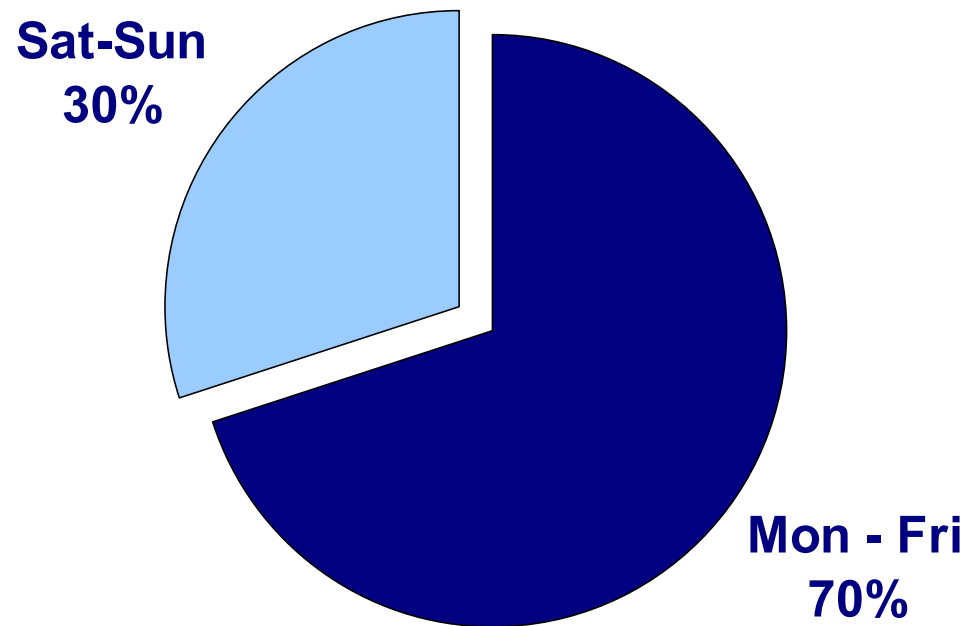
## ... and media consumption

	1999	2000	2001*
Average nb. of PAGES VIEWED per PER DAY	n.a.	14	16
Average MONTHLY DURATION ON THE INTERNET	n.a.	5 H 20 m.	6 H
Average DAILY DURATION on Web PER VISIT AT HOME	n.a.	27 m.	30 m.

- Average daily duration online is increasing, unlike Belgium and France, as well as the average number of pages viewed per day
  - As home access is on the rise, consumers are in a less time-pressured environment. Also, influence of newcomers is moderated by experienced users
- ⇒ results indicate that the average online surfer visits more pages for a longer period of time

# Proportion for pageviews Week vs WE

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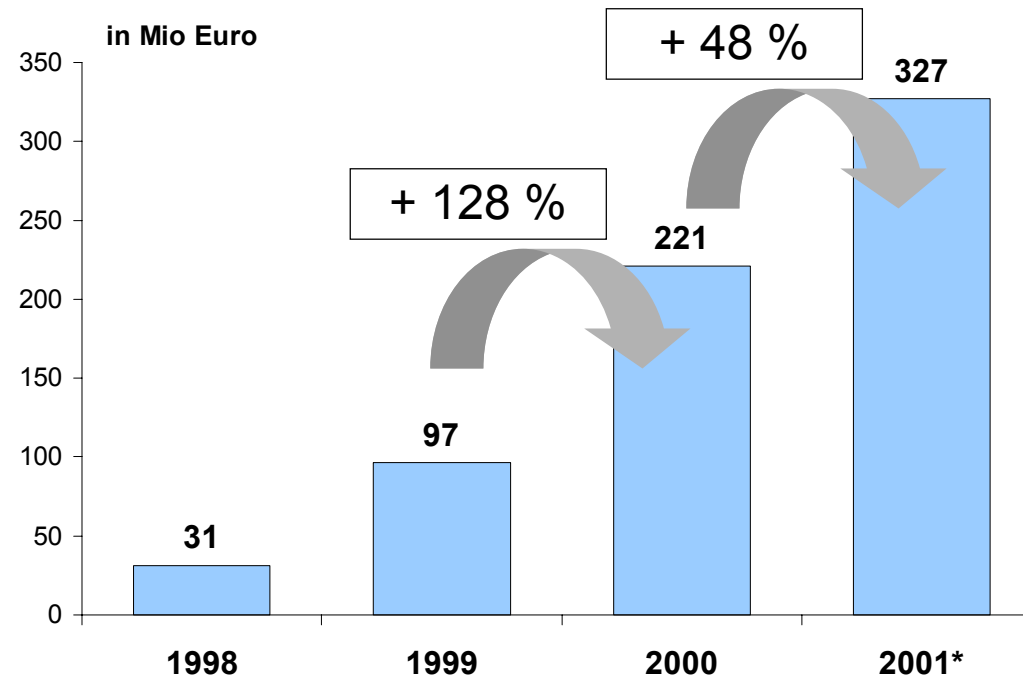


- Amount of pages viewed is clearly predominant during weekdays compared to WE's

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## 6.4. Media investments

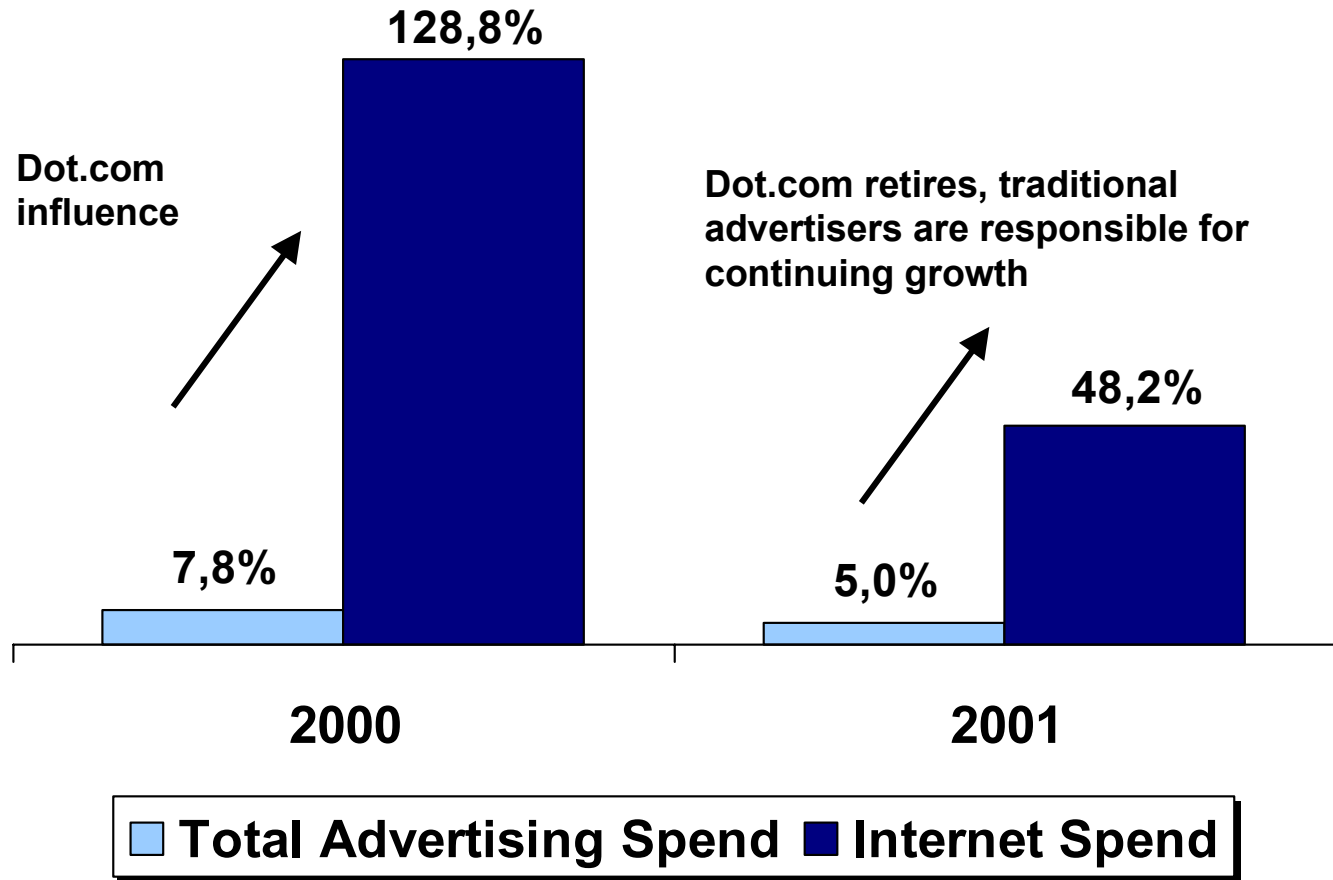
# The era of triple-digit growth has come to an end



- The impressive investment boom from 1999 to 2000 resulted mainly from dot.com companies performing well
- The growth of 2000 to 2001 was fuelled by the adoption of the Internet as a medium type by traditional advertisers



# Internet revenue growth predictions



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## 6.5. Commercial offer

# Commercial offer 2001

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- Sales houses brokering local advertising space only (excluding media owners such as Yahoo, AOL, MSN, etc...)
- Market share ranking:

## Sales houses brokering local advertising space only

Sales houses	Owner	Status
DoubleClick		Sales house part of an int. group
Adlink		Sales house part of an int. group
Real Media		Sales house part of an int. group
24-7		Sales house part of an int. group
AdPepper		Sales house part of an int. group

\*\* Industry Estimate Source: CARAT - List of Sales Houses Only

\* 2001 : 1/1/01-30/6/01

- Top 5 places are held by European and/or global media sales houses
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# Top 10 web sites UK

Property	Unique Audience	Reach %	Time per Person
1. MSN	5 548 240	46.77	00:32:13
2. Yahoo!	4 917 758	41.44	00:41:56
3. AOL Time Warner	4 229 340	35.65	00:17:49
4. Freeserve	3 390 970	28.56	00:12:10
5. Microsoft	3 367 114	28.38	00:04:56
6. British Telecom	3 241 018	27.31	00:21:29
7. Lycos Network	2 913 849	24.56	00:16:06
8. Ask Jeeves	2 351 527	19.82	00:10:03
9. BBC	2 201 574	18.54	00:14:40
10. Google	2 020 950	17.04	00:12:59

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## 6.6. Glossary

# Glossary of Terms

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- **Advertorial**

Editorial content created *ad hoc* upon the request of the advertiser, meant to inform the advertiser's target group about its products and services.

- **Banner ad**

The most common form of advert size on a web page that links (clicks through) to an advertiser's site or mini-website. Banner ads typically run across the top or the bottom of the page. Standard format of 468x60 pixels, 12 KB.

- **Button ad**

Another type of Internet advert in the form of a square or small rectangle. These can sit anywhere on a site, usually in the navigation bar.

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# Glossary of Terms

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- **Impressions (ad impressions)**

Number of times the advertising format (banner, button, text link, etc.) has been accessed by a browser, without regard to duplication. Data is gathered by the web server when a user downloads the image file or object referring to the ad. Site editors sell their space based on users' consumption and so on the quantity of impressions delivered by an ad.

- **Interstitial**

Full-screen advert that appears automatically when you visit a site that carries it.

- **Keywords**

Words used to search on. To save you trying to guess the URL of a website, you can type a keyword, e.g. "cars" or "Nissan", into a search engine. It will then display the names, URLs and short descriptions of the sites that match your search.

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# Glossary of Terms

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- **Page request**

Any opportunity for an html document to appear in a browser window as a direct result of a visitor's interaction with a website. Delivered from a web server, proxy server, or a browser's local cache .

- **Page view**

Request and visualisation of a web page.

- **Pop-up**

An advertiser's window (typically 1 quarter screen size) that can either appear automatically or when you click on a banner ad.



# Glossary of Terms

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- **Rich media**

Expression used to indicate online advertising formats or web productions using multimedia elements and requesting a high level of interactivity, in opposition to static banners.

- **Site**

Group of html pages making up a specific content and identified by a domain name or a group of domain names.

- **Visitor**

Individual who visits a website. Is qualified as unique individual for a determined time lapse. Recognised by a cookie present in the browser of the computer.

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# Internet : Denmark

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## 6.1. Introduction

# Introduction

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- Denmark ⇒ comments :
  - Internet has quickly become a serious medium in Denmark. The reason for the country's widespread use of the internet is Denmark's strong technology infrastructure and service-focused economy.
  - The penetration in Denmark is quite high compared to other European countries : many households have a PC, and most Danes speak and understand English. They can therefore take advantage of many international websites.
  - Data concerning the number of websites allowing local messages were not available before 2001. In October 2001, the total number of local websites were estimated at  $\pm 1.000$  : these figures vary constantly as the emergence and disappearance of websites is ongoing. Packages and newsletters are not included in these figures.

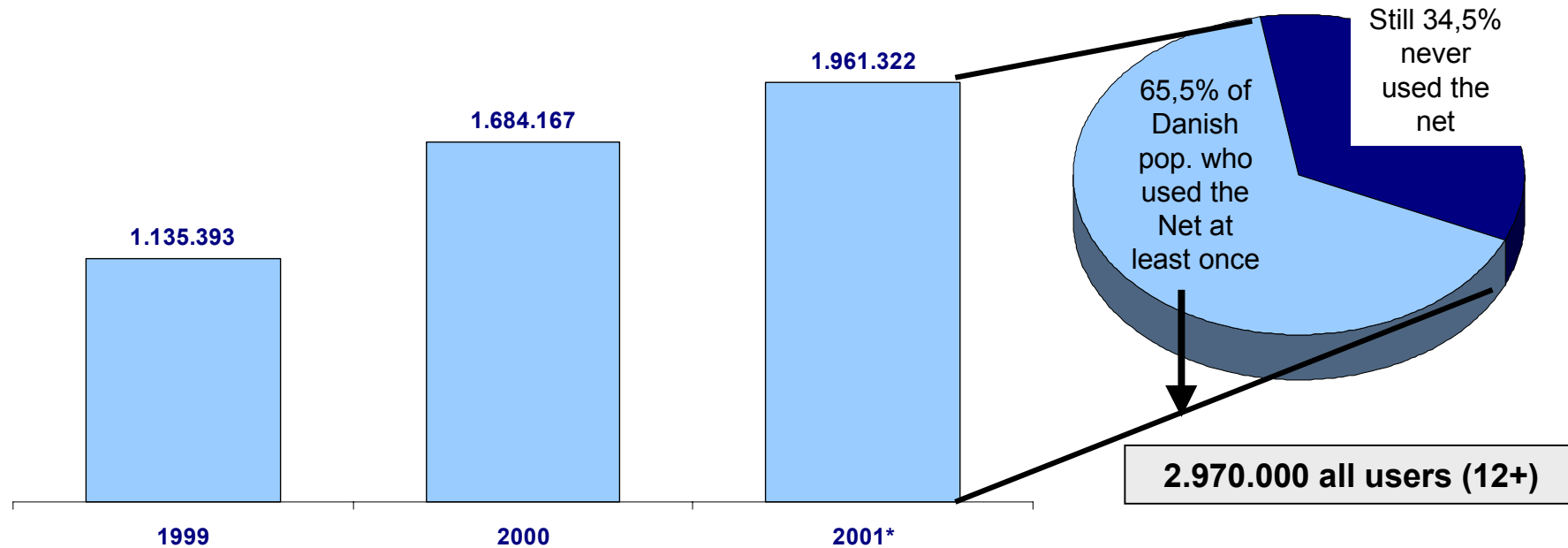
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## 6.2. General indicators

# Number of Internet connections (PC/Mac)

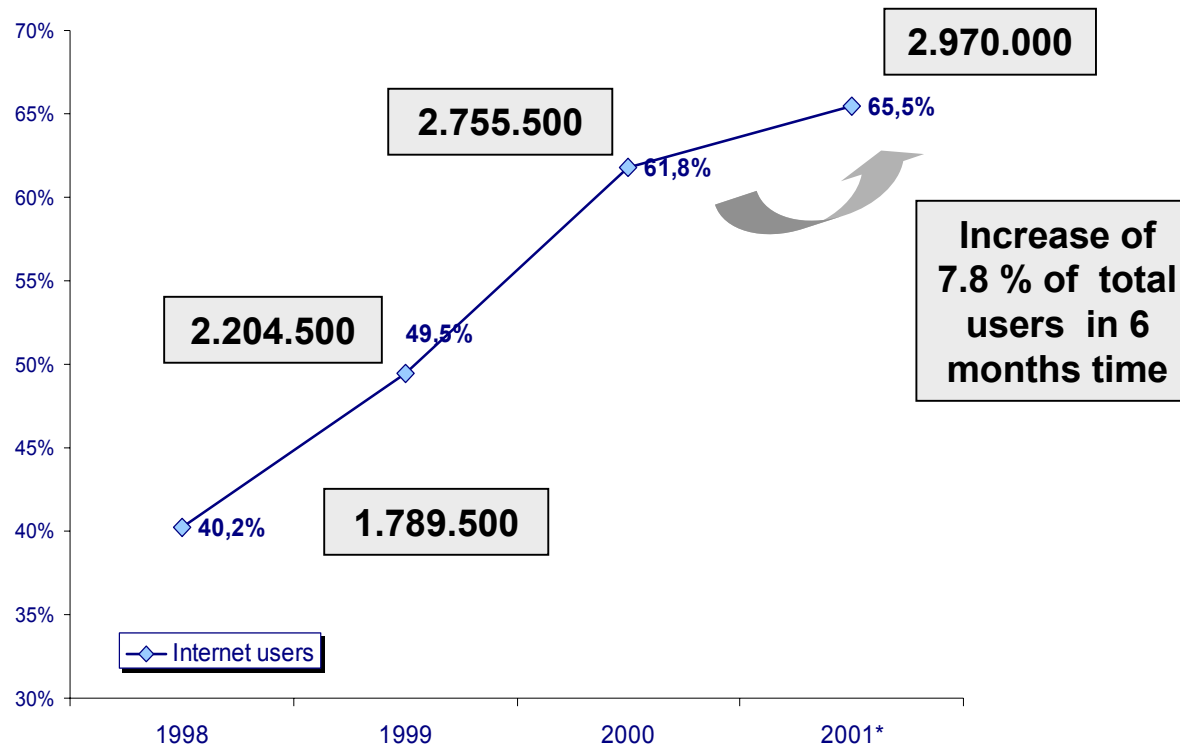
- 13+ (12+ from 2001)

■ Number of PC/Mac Internet connections (all) :



The detail of connections (home/office/school) are not available. But in terms of usage for the year 2000, most Danes surf from home (53.7%), while 35.2% surf as well from home as out of home : this proves that the number of connections is consequent. Fixed and laptop are included.

# Internet users 13+ = ever used internet



No distinction made between home, office or school usage to determine the total users.  
Considered as users : internautes who uses the internet daily to seldom (ever used).



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## 6.3. Audiences

# Usage frequency ... and media consumption

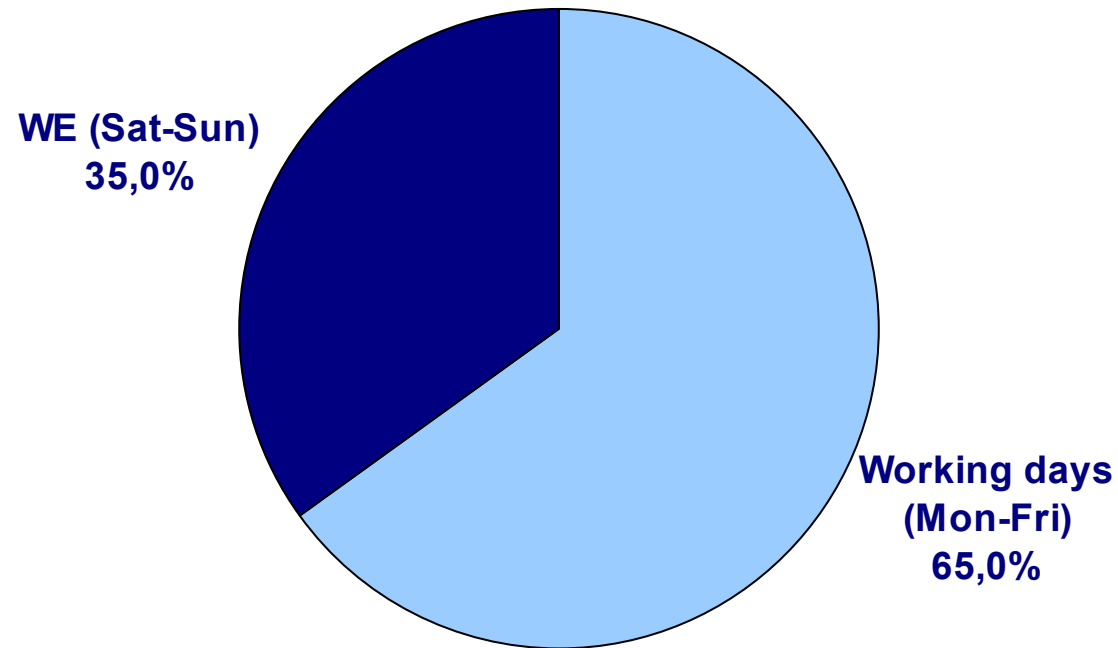
<u>Average 2001*</u>			
daily users	daily pageviews/user	days per month online	daily duration on web
951 847	17,4	10,5	43 min

No distinction made between average daily duration on web for private/profesional reasons.

The average number of impressions displayed per user are not available at this stage. The data collection mode is based on a home panel composed of people of 2 years and + (this measurement started in July 2000). Additional to this measurement, Jupiter MMXI & Gallup are trying to measure the total traffic at home AND out of home : planification of this measurement for Q4 2001.

# Proportion for pageviews Week vs WE 2001

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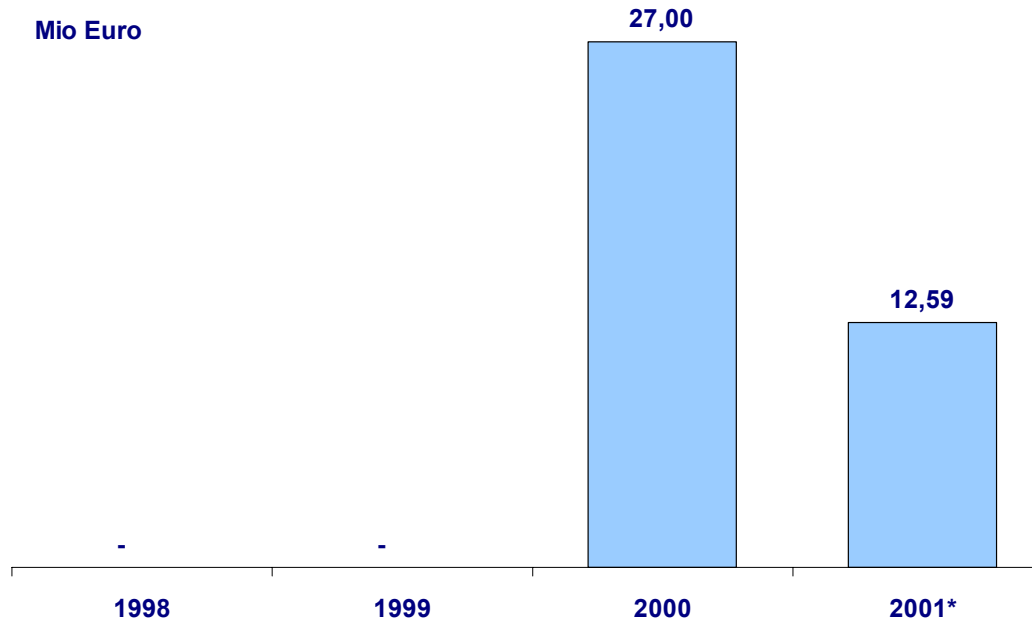
Amount of pages viewed is clearly predominant in weekdays compared to WE's. But compared with duration of time spent online, the average duration is longer during the WE than the weekdays (47 minutes versus 41 minutes).

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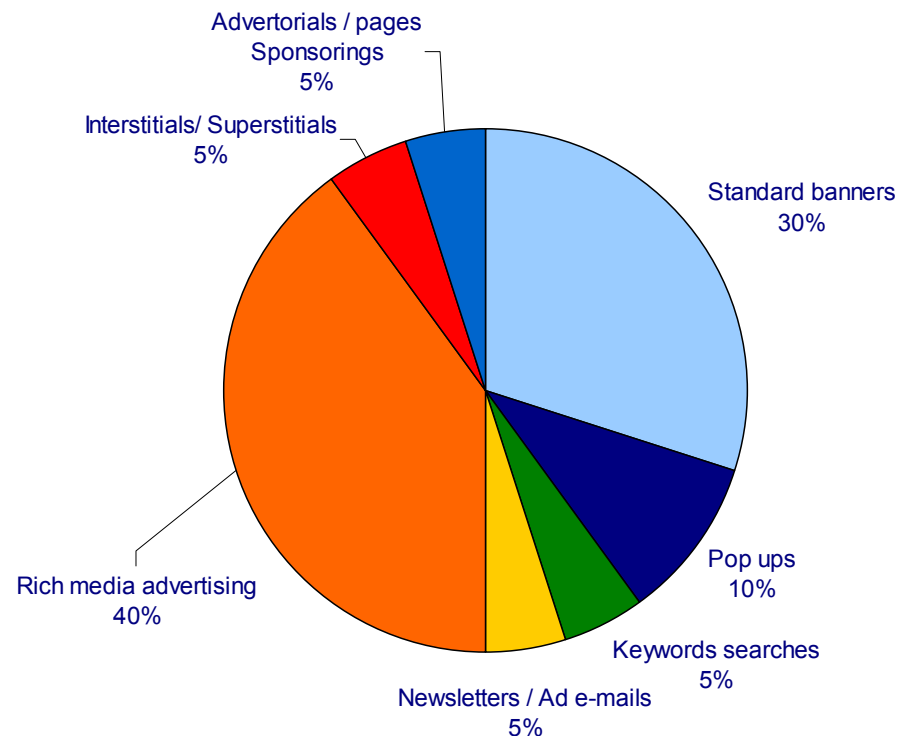
## 6.4. Media investments

# Total online media investments



No data was collected before 2000 by the official barometer, but according to the media sales house Carat Intractive Sweden, a huge increase in investments has been observed from 1999 to 2000. Spendings of Q1 2001 are at the same level as Q1 2000. But market expectations are decreasing : figures of 2001 are expected to be lower than 2000

# Investments per creative formats



The standard banner is losing importance in the split of investment per format : the use of rich media advertising (with includes every imaginable format but with integration of rich media technology) is gaining in importance.

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
Jubii/lycos	doubleclick	Site owner/ editor
S-OL	adpepper	Site owner/ editor
MSN	S-OL	Site owner/ editor
Yahoo	Lycos	Site owner/ editor
Doubleclick, Adpebber, Dayrates, Metropol, Adlink, Tradedoubler		Site owner/ editor
Metropol		Local sales house
Doubleclick		Sales house part of an int. group
adpepper		Sales house part of an int. group
S-OL		Sales house part of an int. group
Jubii/lycos		Sales house part of an int. group
MSN, Yahoo, dayrates		Sales house part of an int. group



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## 6.6. Glossary

# Definitions of creative formats

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- Standard banners :
  - Topbanners or button ads (format :468\*60 - 15 kb or 125\*125), generally placed at the top of webpage
- Pop ups :
  - A little browser window on top of the website-it closes after 5 second. No specific size.
- Keywords searches :
  - The browser places an ad which has a relation with the search request on search engines. Example: serach "bank" and an ad/link for Dansk Bank appears.
- Newsletters / Ad e-mails
  - An advertorial text placed in newsletters including a link send to the users (formats :HTML, GIF, Flash, Text, ...)

# Definitions of creative formats

---

- Rich media advertising :
  - Advertising that makes usage of enliven, mouse-over, flash, ... technology (all sizes accepted, max 15 kb)
- Interstitials/ Superstitials :
  - Advertising webpage appears between 2 webpages/Interactive pop-up (no specific size, max 20 kb)
- Advertorials / pages Sponsorings :
  - Advertisers' presence with logo, image, .... on a website; mainly concluded for a long periode of time.
- Others :
  - Every ideas are accepted or can be developped



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# Internet : Finland

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## 6.1. Introduction

# 6.1. Introduction

---

Finland ⇒ comments :

Finland's highly developed communication technology infrastructure, as well as its high PC household penetration, have allowed the country to find a place at the forefront of the Internet-inspired electronic revolution. Finland has the world's highest per capita density in internet connections. Reason for this is the liberalisation of the telecom market in 1994.

No data can be given today about the number of websites allowing local ad messages, but a general fact is that web publishing is at a very high level in Finland, with a large number of small and large media companies involved, in spite of the fact that this business is still running at a loss.

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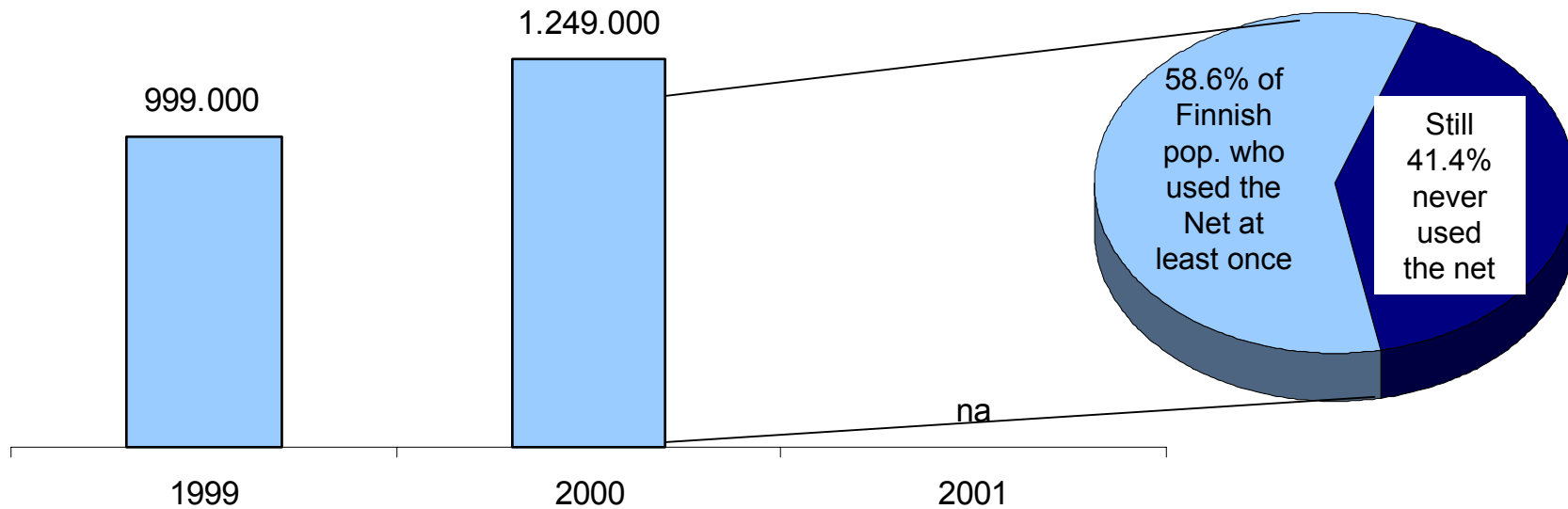
## 6.2. General indicators



# Number of Internet connections (PC/Mac) - 15-74

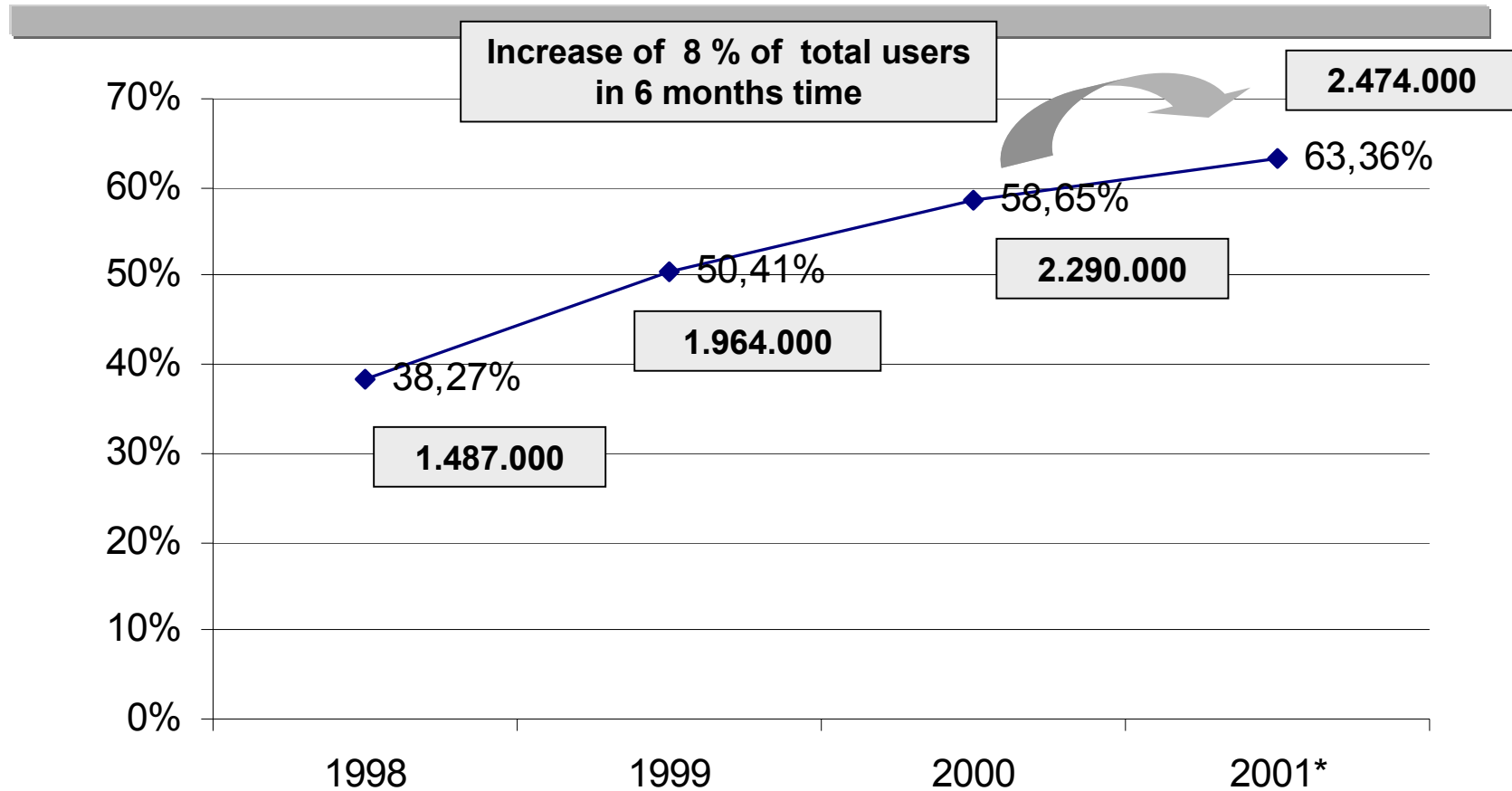


## Home connections



Out of home connections : data is not available.

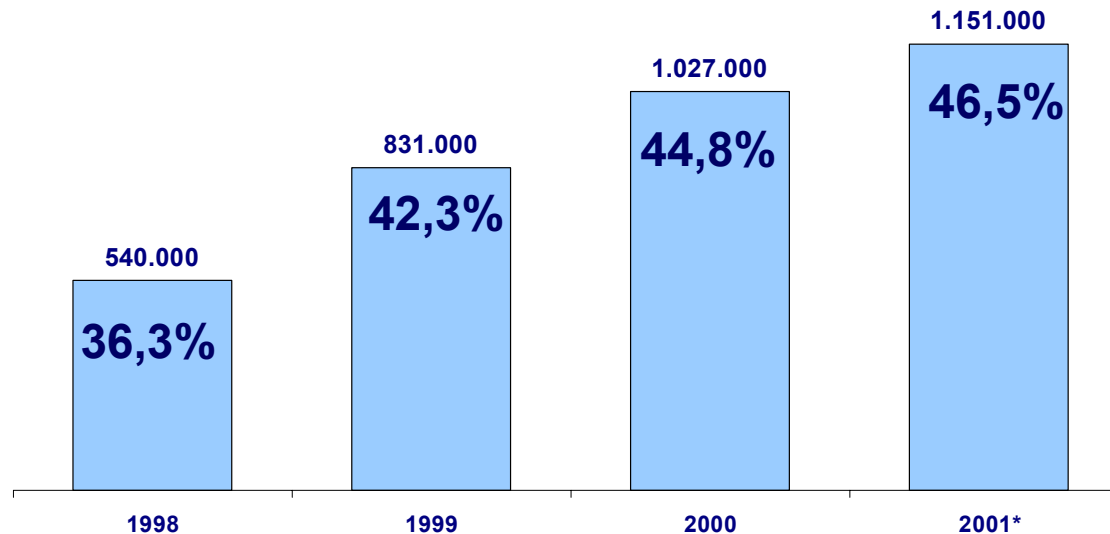
# Internet users (adults 15-74) = uses internet once in a while



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## 6.3. Audiences

# Usage frequency ...

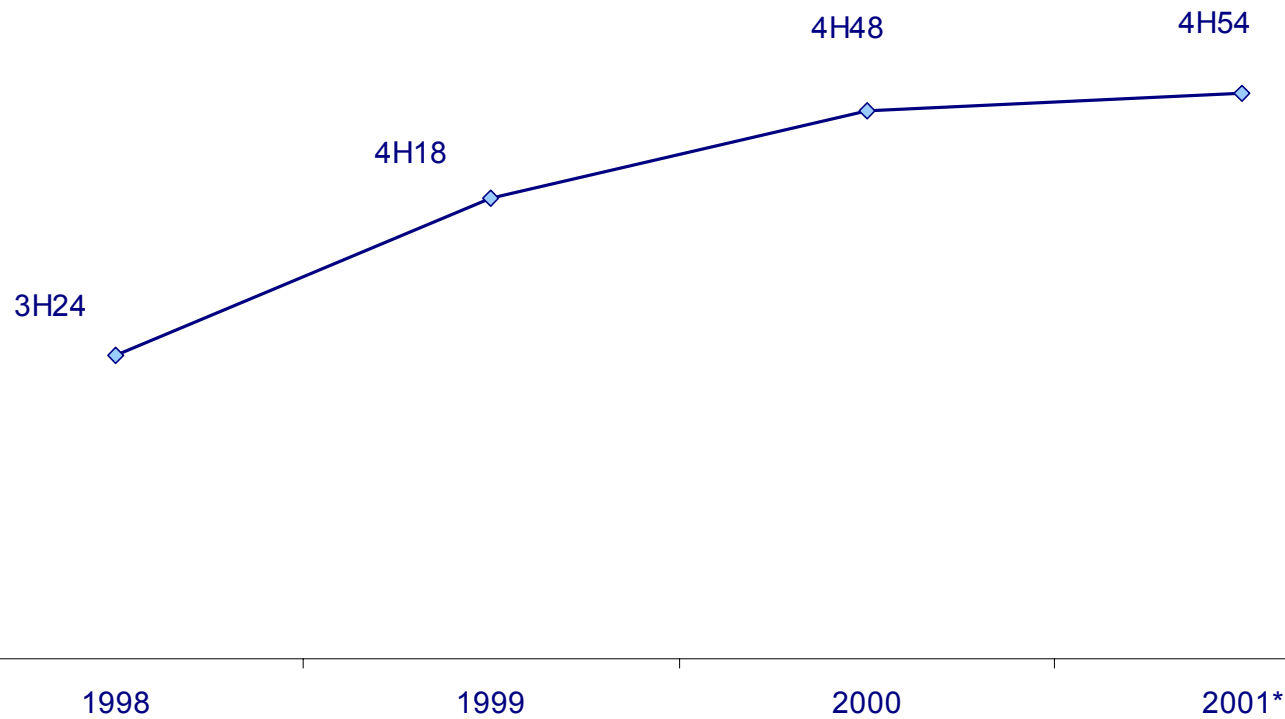


Average DAILY users (all days - based on yearly total)

No data available about concerning details of media consumption (pageviews per user, impressions per user, ...)

# ... and media consumption

Average daily duration on web

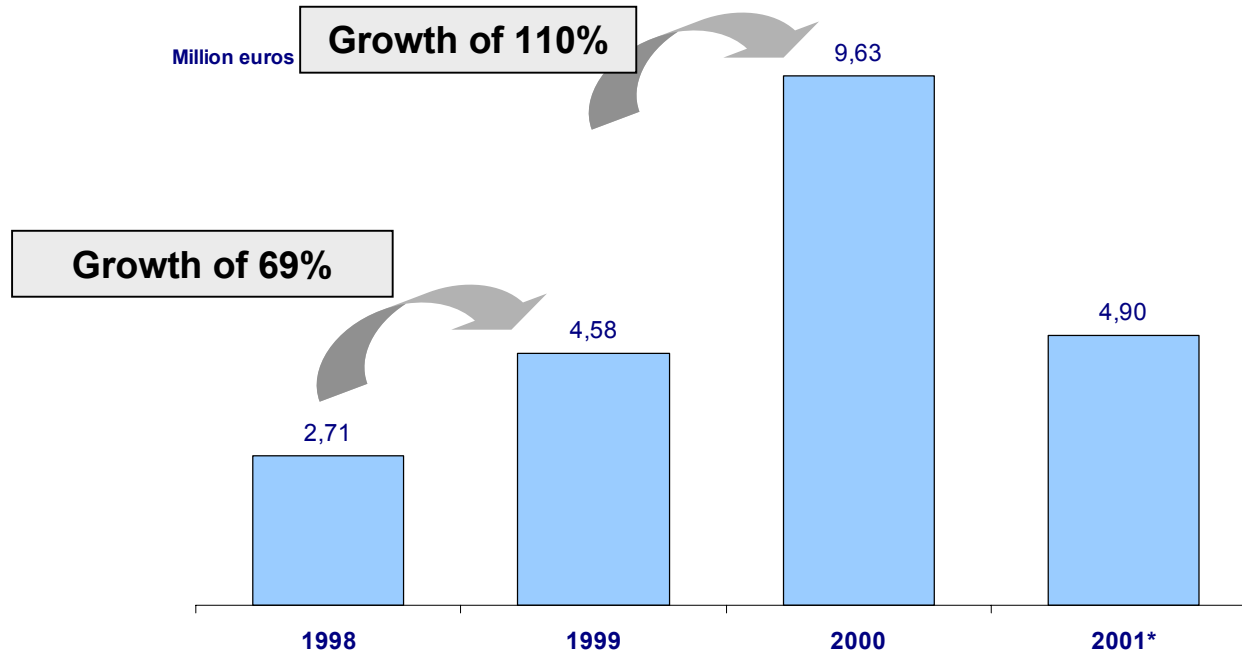


No split working days versus week-ends

---

## 6.4. Media investments

# Total online media investments



No split of investments per creative format. Online growth ⇒ comments :

1998 - 1999 : high growth indexes, but represent small share compared to all media

1999 - 2000 : linear increase of investments

2000 - 2001 : linear growth is interrupted. Investment level won't outline 2000 figures.

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## 6.5. Commercial offer



# Commercial offer 2001

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Sales houses : site owner/editor	Owner	Status
Soneraplaza.fi	Sonera Oy	Site owner/ editor
MTV3.fi	Almamedia Oy	Site owner/ editor
MSN.fi	Microsoft.	Site owner/ editor
Kolumbus.fi	Elisa Oy	Site owner/ editor
Jippii.fi	Saunalahti Oy	Site owner/ editor
Sanoma WSOY verkkomediamyynti	Sanoma WSOY	Site owner/ editor
Kauppalehti.fi	Talentum	Site owner/ editor
Netpool	Telia Ab	Local sales house
Adpepper	AdPepper International	Sales house part of an int. group

---

## 6.6. Glossary

# Definitions of creative formats

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- **Adforms are not standardized in Finland**
- Standard banners :
  - Standard graphic ad-formats (468\*60 pixels), consisting of images, and text, often basically animated.
- Pop ups :
  - Consists of a window that opens automatically when the internaut arrives on a webpage. Window has to be closed by a click from the user.
- Keywords searches :
  - Consists in showing an advertisement linked to a requested subject in the sites' search engine.

# Definitions of creative formats

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- Newsletters / Ad e-mails
  - Mainly 300 - 500 characters published in text or HTML format in newsletters / advertising e-mails
- Rich media advertising :
  - Standard ad-formats using enliven, flash, ... technology in order to renders the advertising message more attractive.



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# Internet : Germany

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## 6.1. Introduction

# Introduction

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Germany ⇒ comments :

Germany is included in the group of the early adopters of the internet, as the usage of the internet started very early in universities. But the growth in the German Internet market has been curtailed by high Internet access charges, till the liberalisation of the telecommunication market in Germany. Prices have dropped and penetration increased rapidly to reach a level of 46% penetration mid-2001.

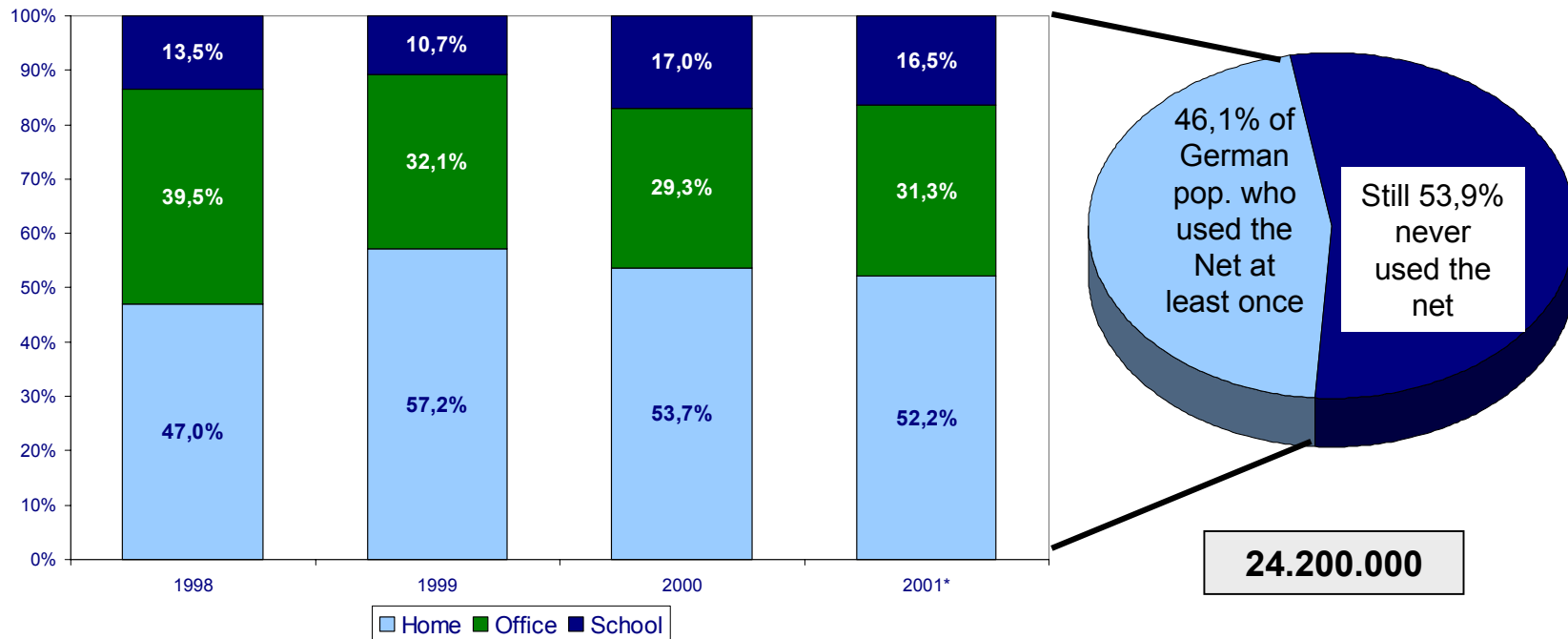
As in other countries, the constant appearance/disappearance of local websites renders it complicated to list the exact number of websites : no data is available about the exact number of websites allowing local messages.



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## 6.2. General indicators

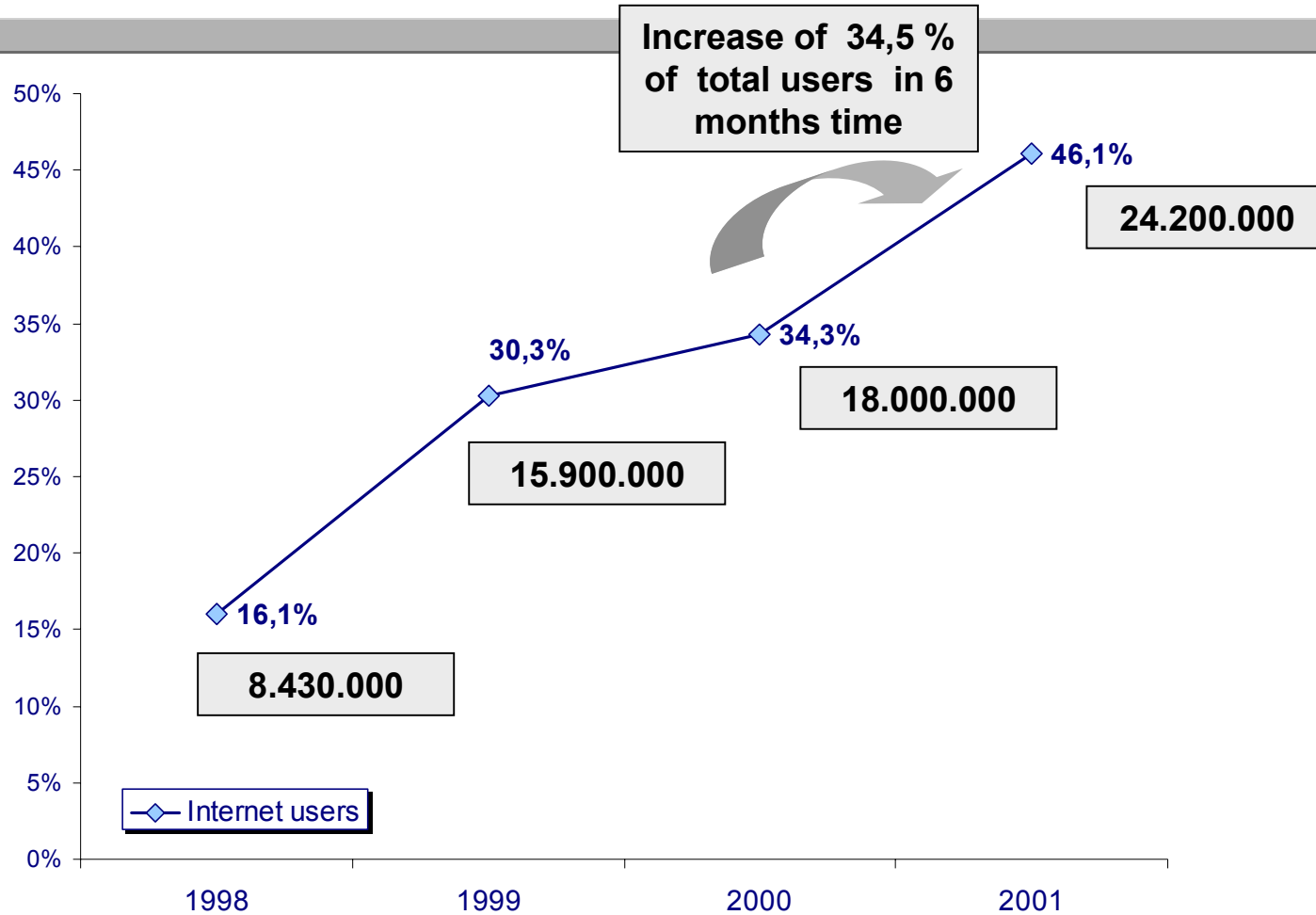
# Number of Internet connections (PC/Mac) - (14-69 years)



Total number of connections (all) = 32.100.000 (duplication included)

Home connection is privileged

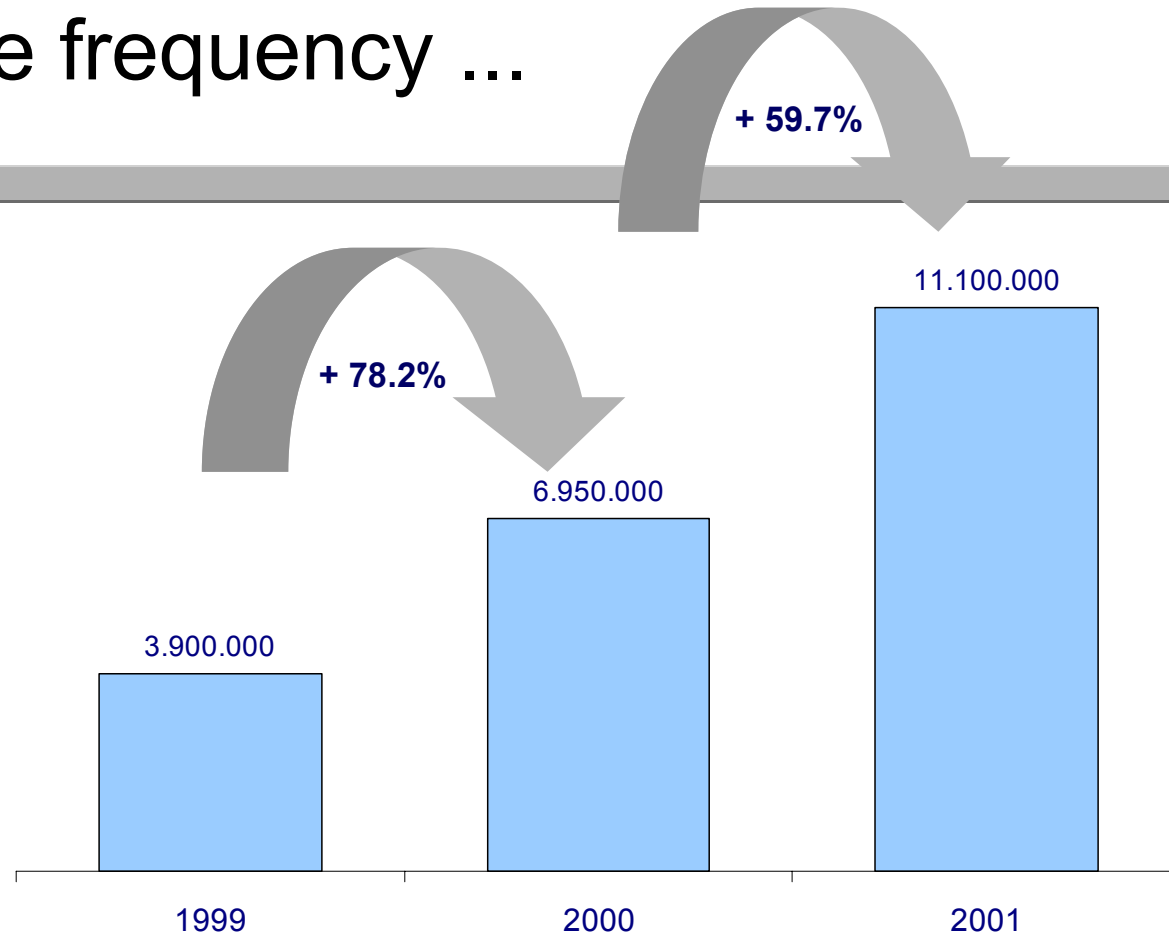
# Internet users (adults 14-69) = uses internet occasionally



---

## 6.3. Audiences

# Usage frequency ...



Increase in number of frequent users  $\Rightarrow$  6.950.000 average daily users are repertoriated for the year 2000.

Average days per month spent online : 11,1 days\*

## ... and media consumption

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<u>Average daily duration on web</u>			
	<b>all visits</b>	<b>prof purpose</b>	<b>priv purpose</b>
<b>2000</b>	55	54	60
<b>2001</b>	69	65	61

Time spent online increases, mainly for professional purpose than for private purpose. This does not mean that the internet has a cannibalisation effect on other media consumption: new media does not displace classical media but complement it. No data available concerning the number of pageviews split per working days versus week-ends.

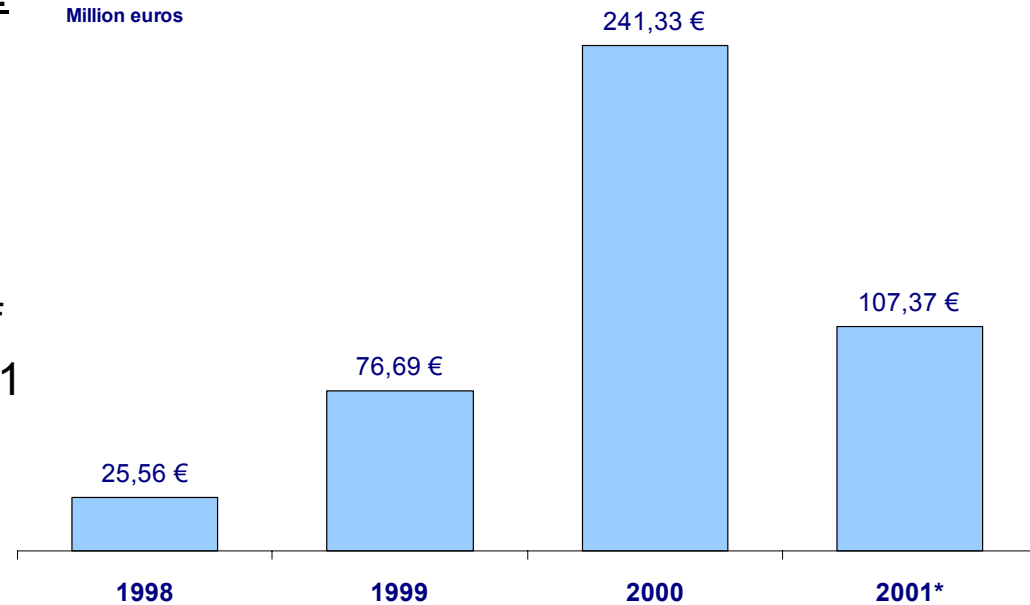
---

## 6.4. Media investments

# Total online media investments

## Growth evolution and comments :

- 1998 → 1999 : growth
- 1999 → 2000 : phase of online boom (dotcoms and traditional advertisers)
- 2000 → 2001 : stagnation of the market forecasted for 2001 (decline of dotcom industry and their online media investment)



No data available for investments per creative formats : data not collected and no estimations available



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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
guentiger.de	Hartmann & Schnoor Informationsdienste Verlag	Site owner/ editor
Verlag 42	Vermarktungsgemeinschaft Verlag 42	Site owner/ editor
Netzquadrat	Netzquadrat GmbH	Site owner/ editor
EMS/ G+J	Gruner + Jahr	Local sales house
Tomorrow	Verlagsgruppe Milchstraße	Local sales house
IAC	n.a.	Local sales house
InteractiveMedia	Axel Springer Verlag	Local sales house
Quality Channel	Quality Channel GmbH	Local sales house
DoubleClick	Double Click Inc. / USA	Sales house part of an int. group
RealMedia	Real Media Worldwide Inc.	Sales house part of an int. group
AdPepper	Ad Pepper Media AG	Sales house part of an int. group
AdLink	Ad link Internet Media AG	Sales house part of an int. group
24/7	n.a.	Sales house part of an int. group
SevenOne Interactive	SevenOne Media AG	Mixed ownership
IP-NewMedia	IP-Deutschland, RTL	Mixed ownership

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## 6.6. Glossary

# Definitions of creative formats

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- **Static Banners**
  - These are simple graphic banners, consisting only of a picture/image. Interaction is produced by a click on a banner that is linked with a specific website.
- **Animated Banners**
  - Animated Banners exist on the one hand as GIF- or JPEG format and can be produced as animated pictures, being shown as a sequence. Thus, it is possible to present advertising as a kind of "movie", even if the possibility of interaction is still a link.
- **Pop ups**
  - This form of advertising is similar to an interstitial. However, in this case the advertising is not shown directly in the browser but in a smaller new window on top of the previous page. This window opens automatically and is closed by a click from the user.

# Definitions of creative formats

---

- Keywords searches
  - In this example your advertising banner only appears in combination with a specific search string and is in fact displayed in the hitlists for the query. Selecting specific keywords enables you to define and directly address your target groups.
- Newsletters / Ad e-mails
  - This form of advertising is sent by e-mail. The electronic newsletters inform an ever-growing list of subscribers about news on a particular subject and generally appear on a weekly basis. Those who opt for this form of advertising can expect a high level visibility.
- Rich media advertising
  - Type of Online Advertising format, where multimedia-functions are integrated. A rich-media-banner for example, is a banner, where functions like games, feedback-opportunities or even video and audio-elements can be integrated.

# Definitions of creative formats

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- **Interstitials/ Superstitials**
  - Interstitials are advertising splashes that the user sees, for example, when a particular page is retrieved. They are activated when the page is called up and disappear after a defined period of time, e.g. as soon as the requested page has been completely loaded.
- **Advertorials / pages Sponsorings**
  - In this special form of advertising you sponsor the high-quality content produced in one of our online editorials. In return you place your logo directly within the editorial section along with the text "sponsored by". We thus offer you an ideal form of advertising.
- **Ad games/competition**
  - In conjunction with a website, you can develop games and puzzles directed at your particular target group. During the process, your product and company name are specially highlighted and efficiently advertised. For instance, your name appears in the tease.

# Definitions of creative formats

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- **Blow Up**
  - A pop-up of a somewhat different kind: the advertising space "inflates" and reaches its final size after a short interval. It then looks just like a pop-up.
- **Content-News-Brak**
  - This is a form of advertising and an actual advertisement in one! Unusual dimensions (148x40 pixels for the content break and 112x25 pixels for the news break, both with 3KB max.) mean that these new forms of advertising attract a lot of attention.
- **Download Wallpaper**
  - During the download your advertising appears as wallpaper permanently covering the entire page in the form of a jpg.
- **Flying Banner**
  - In this instance your banner roams from one particular point to its later position. The flying banner is triggered when the site is called up or by a click on the advertising surface.

# Definitions of creative formats

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- Logo curser
  - When a certain site is called up, a small advertising surface appears (e.g. in the form of a logo) to the bottom-right of the mouse pointer.
- Microsites
  - This is an editorial site to coincide with a trade fair, a sporting occasion or other events. Your campaign can then be ideally integrated into this so-called microsite. The microsites concept is a unique form of advertising which, by specially focussing on the brand/product and by a funny way, gives a huge memorisation rate.
- Mouse-Over Ad
  - In the mouse-over ad an advertising window opens as soon as the user drags the cursor arrow over a particular advertising area. The window, e.g. a pop-up, then remains open but can be clicked shut again. Mouse-over ads are among those interactive advertis



# Definitions of creative formats

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- **Promo Button**
  - A promo button is smaller than a banner and generally offers an advertising surface of 80 x 30 pixels with which you can generate high levels of coverage.
- **Promo Area**
  - In contrast to an advertising banner, the message is presented in a context-dependent format and is thus better integrated into the overall site.
- **Scroll Ad**
  - The Scroll Ad is a clickable advertising space (100 x 140 pixels, max. 8 kB) on the right-hand edge of the screen, which moves as you scroll and cannot be closed. GIF, JPEG and even flash formats can all be inserted.

# Definitions of creative formats

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- Skyscraper
  - Skyscrapers stand for size, architectural flair and a lot of space – just like this high-format advertising. It is inserted on the right next to the editorial content in the immediately visible area. The relatively large format (120 pixels x variable), maximise your visibility.
- XXL-Content Ad
  - This new large-format advertising surface is so big that it can only be partially seen in the immediately visible area. The dimensions of the XXL Content Ad can be varied up to 320 x 360 pixels. It is thus strongly oriented towards the familiar printed medias.



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# Internet : Italy

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## 6.1. Introduction

# Introduction

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Italy ⇒ comments :

Internet has been restrained by considerable access barriers, caused by a low penetration in PC households, low computer literacy and high connection charges.

Growth rate of Internet usage is linked to the quality contents supplied by new sites and the launch of home banking services from 1998. The Government has also contributed to the spread of the Internet by supporting informative and educational campaigns and by liberalising the telecommunication market.

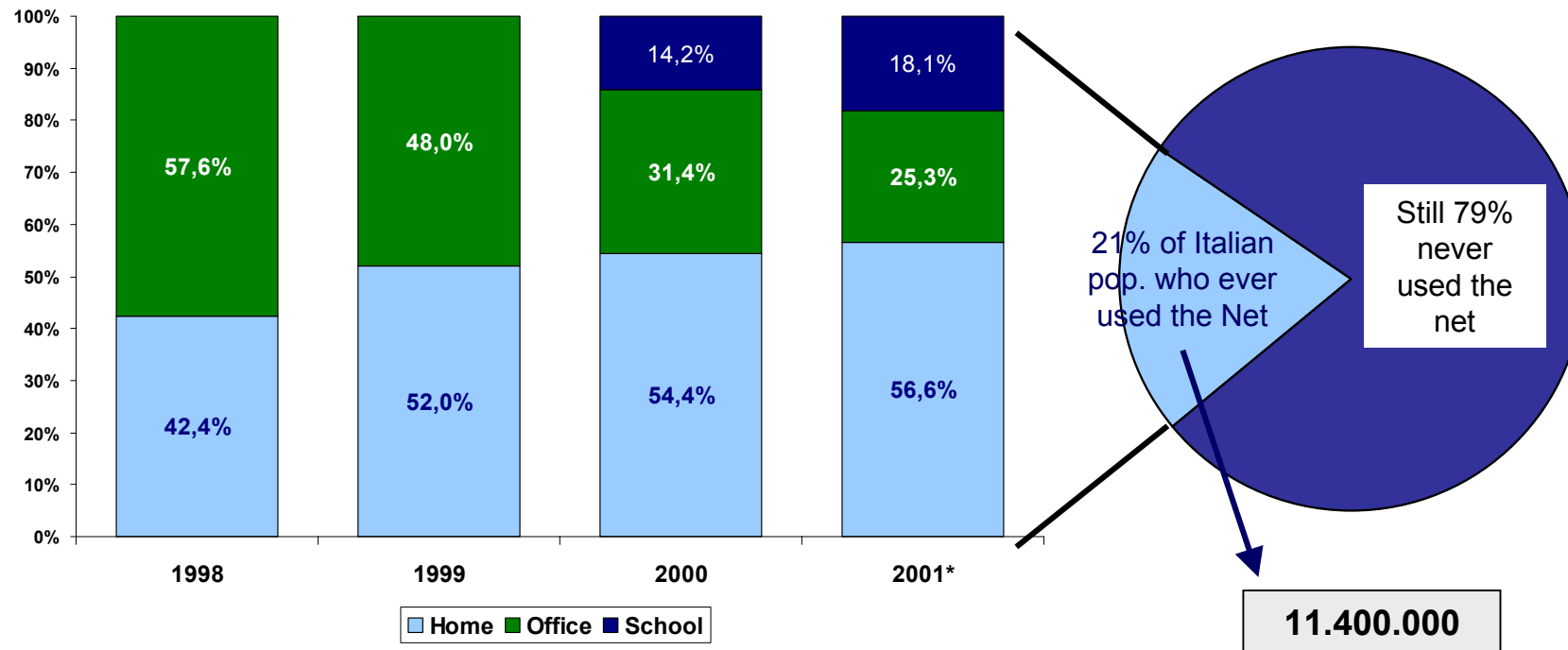
Regarding the number of websites accepting local ad messages, no exact data or estimation can be given, due to the abundance of the offer.

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## 6.2. General indicators

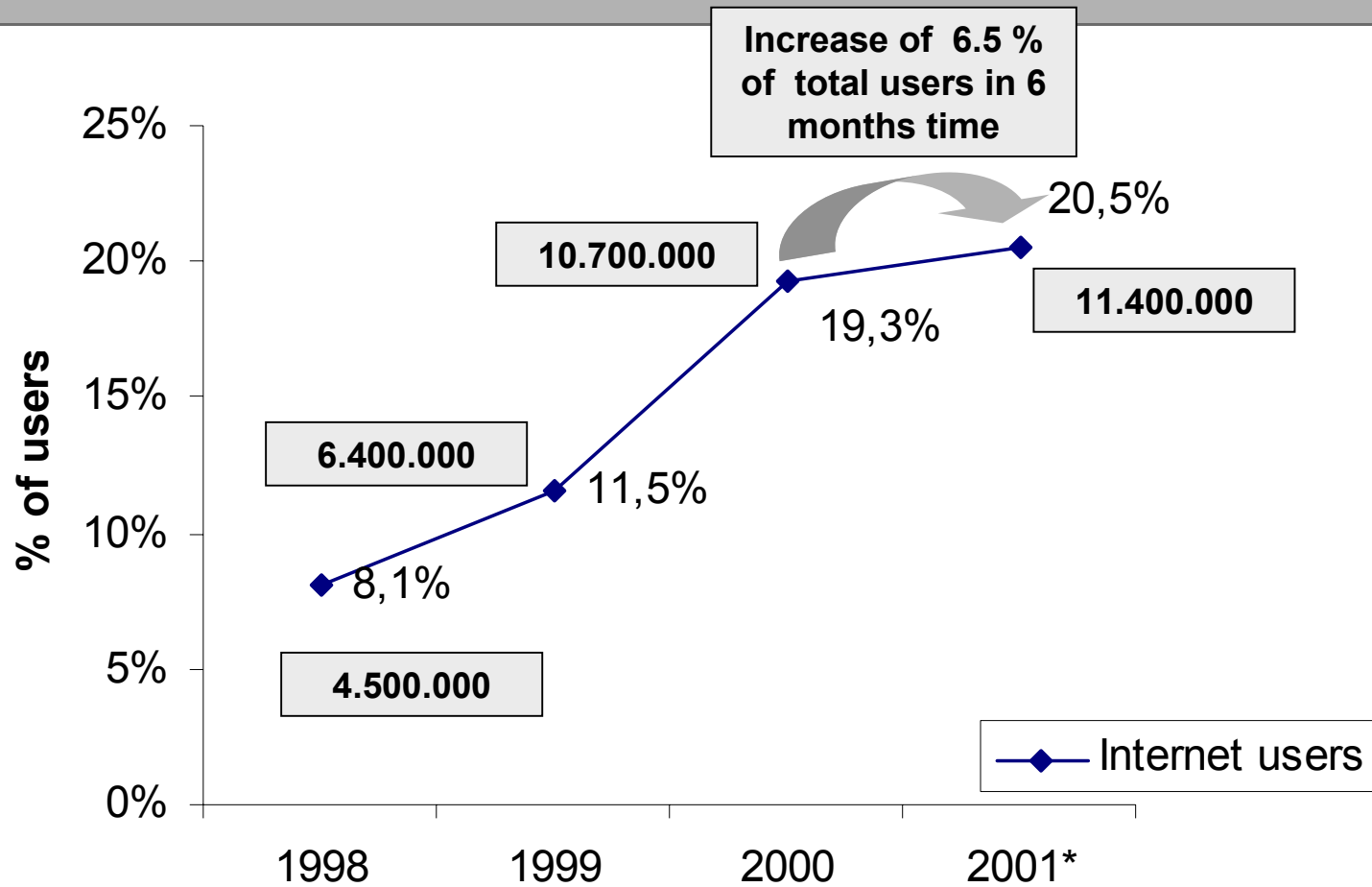
# Number of Internet connections (PC/Mac)



Total number of connections (all) = 11.545.000 (duplication included)



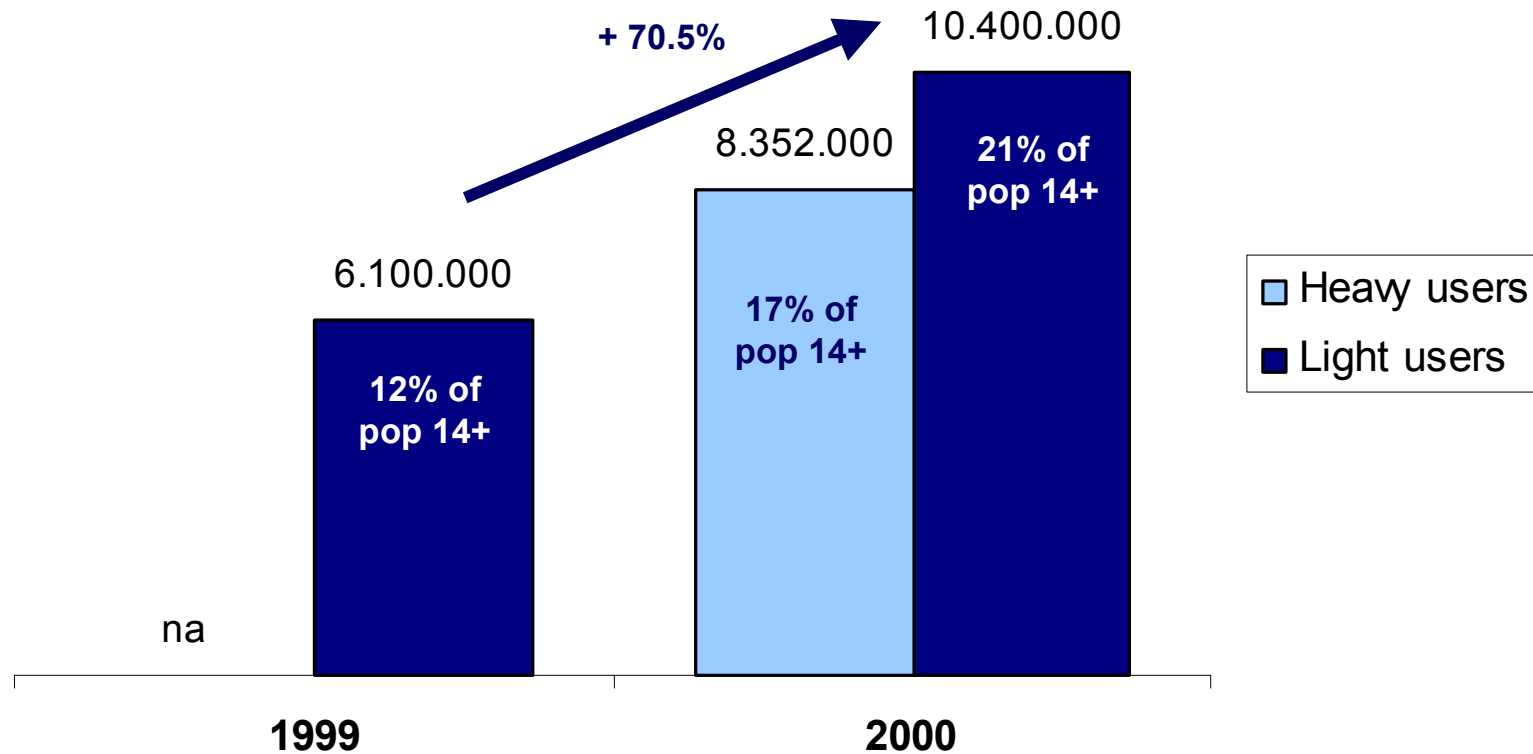
# Internet users (all users 6+ = "ever used internet")



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## 6.3. Audiences

# Usage frequency...



Heavy users = who used the internet at home or at work in the last month

Light users = who used the Internet at least once in the last 3 months

## ... and media consumption

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<u>Average (650 sites registred by the survey)</u>			
	<u>daily pageviews/user</u>	<u>monthly duration on web</u>	<u>daily duration on web</u>
<b>2000</b>	16,1	5H20	na
<b>2001</b>	18,2	6H30	45 min

### No data available for :

- Average daily impressions per user
- Proportion of pageviews during working days versus week-ends

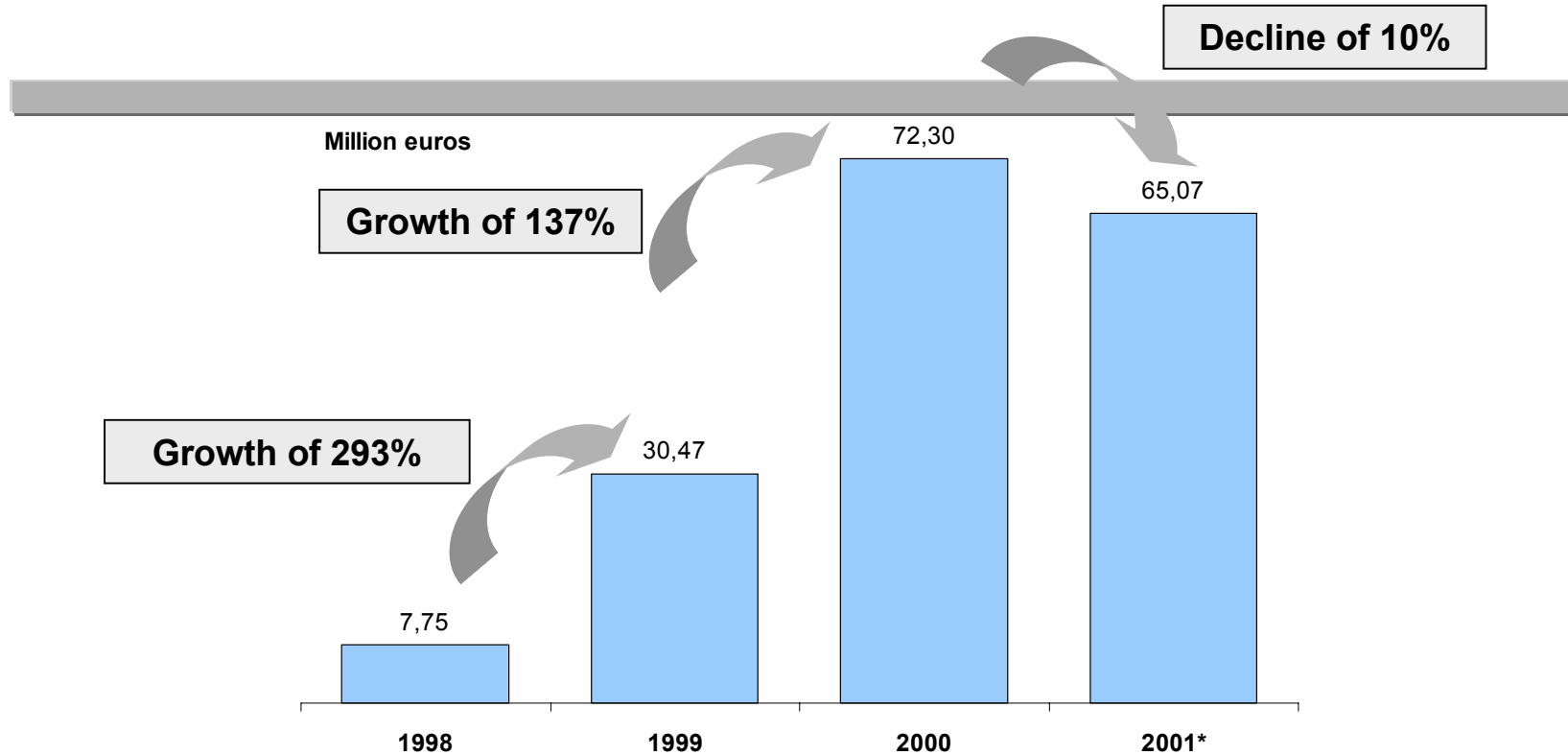
### Comments :

- Development of official audience measuring tool in Italy projected for 2002
- Description of project : Audiweb (association of advertisers and publishers) for collecting data from global estimations and forecastings

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## 6.4. Media investments

# Total online media investments



## Growth evolution ⇒ comments :

1998 - 1999 : start of important online investments

1999 - 2000 : Boom of the investments connected to an important attention by the market (internet gained 1% of the market share of total advertising expenditures)

2000 - 2001 : The investments levelled off due to a general global crisis, and absence of Dotcom

# Investments per creative formats

	2000	2001*
<b>Standard banners</b>	63%	50%
<b>Sponsorship</b>	19%	20%
<b>Interstitials + others</b>	18%	n.a.
<b>Newsletters / Ad e-mails</b>	n.a.	15%
<b>Rich media advertising</b>	n.a.	10%
<b>Others</b>	n.a.	5%

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## 6.5. Commercial offer



# Commercial offer 2001

Sales houses	Owner	Status
Tiscali Net	Tiscali Spa	Site owner/ editor
Clarence	Dada	Site owner/ editor
Il Sole 24 Ore	Il Sole 24 Ore	Site owner/ editor
Mondadori	Mondadori	Site owner/ editor
Active Advertising	Seat/TIN	Local sales house
Ideadvert	Firstream	Local sales house
Classclick	Class Editori	Local sales house
Click it	Kiwi - Pino Venture	Local sales house
Manzoni	Gruppo Espresso-Kataweb	Local sales house
Spe	Monrif editori	Local sales house
Bread & Butter	Infostrada - Wind	Local sales house
Piemme	Caltagirone	Local sales house
Publikompass	Fiat	Local sales house
RCS	Rizzoli Editori	Local sales house

# Commercial offer 2001 (2)

Sales houses	Owner	Status
Sipra	Rai	Local sales house
Cairoweb	Cairo Pubblicità	Local sales house
Radio & Reti	Radio & Reti	Local sales house
Publitalia	Mediaset	Local sales house
Doubleclick	Doubleclick	Sales house part of an int. group
Ad Pepper	n.a.	Sales house part of an int. group
Ibazar	Ebay	Sales house part of an int. group
Altavista	Altavista	Sales house part of an int. group
Yahoo!	Yahoo! Inc.	Sales house part of an int. group
Dooyoo	Dooyoo	Sales house part of an int. group
Lycos	Bertershman	Sales house part of an int. group
MSN	Microsoft	Sales house part of an int. group
Hi-media	Hi-media	Sales house part of an int. group
Ad line	Dada/SMA	Mixed ownership
Excite	Tiscali	Mixed ownership

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## 6.6. Glossary

# Definitions of creative formats

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- **Standard Banners**
    - Format most use by internet editors to generate clickthrough, the common format are 234x60 pixels for the banners and 468x60 for the full banners.
  - **Pop ups**
    - Java script box which appears on a visit to a site.
  - **Keywords searches**
    - The most useful way to search something on the web, the keywords can recall a banner or a link to an advertiser.
  - **Newsletters / Ad e-mails**
    - Informations e-mails send to the subscribers which can also contain an advertisement or a link to an advertiser.
  - **Rich media advertising**
    - All kind of advertisement on line that are using multimedia resources in order to create great interactivity with the users.
-

# Definitions of creative formats

---

- **Interstitials/ Superstitials**
  - Java script windows different from the browser that open up during a visit on a site and which contains a lot of informations.
- **Advertorials / pages Sponsorings**
  - Editorial side of the site modified to enhance the advertising contents.
- **Button**
  - Format smaller than the standard banner (ex:120x60 or 90x102 pixels) used as sponsor for a certain time (week, month).
- **Direct e-mail**
  - Advertising e-mails send to subscribers who allowed editors to recieve advertisement by e-post.



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# Internet : The Netherlands

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## 6.1. Introduction



# Introduction

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Netherlands ⇒ comments :

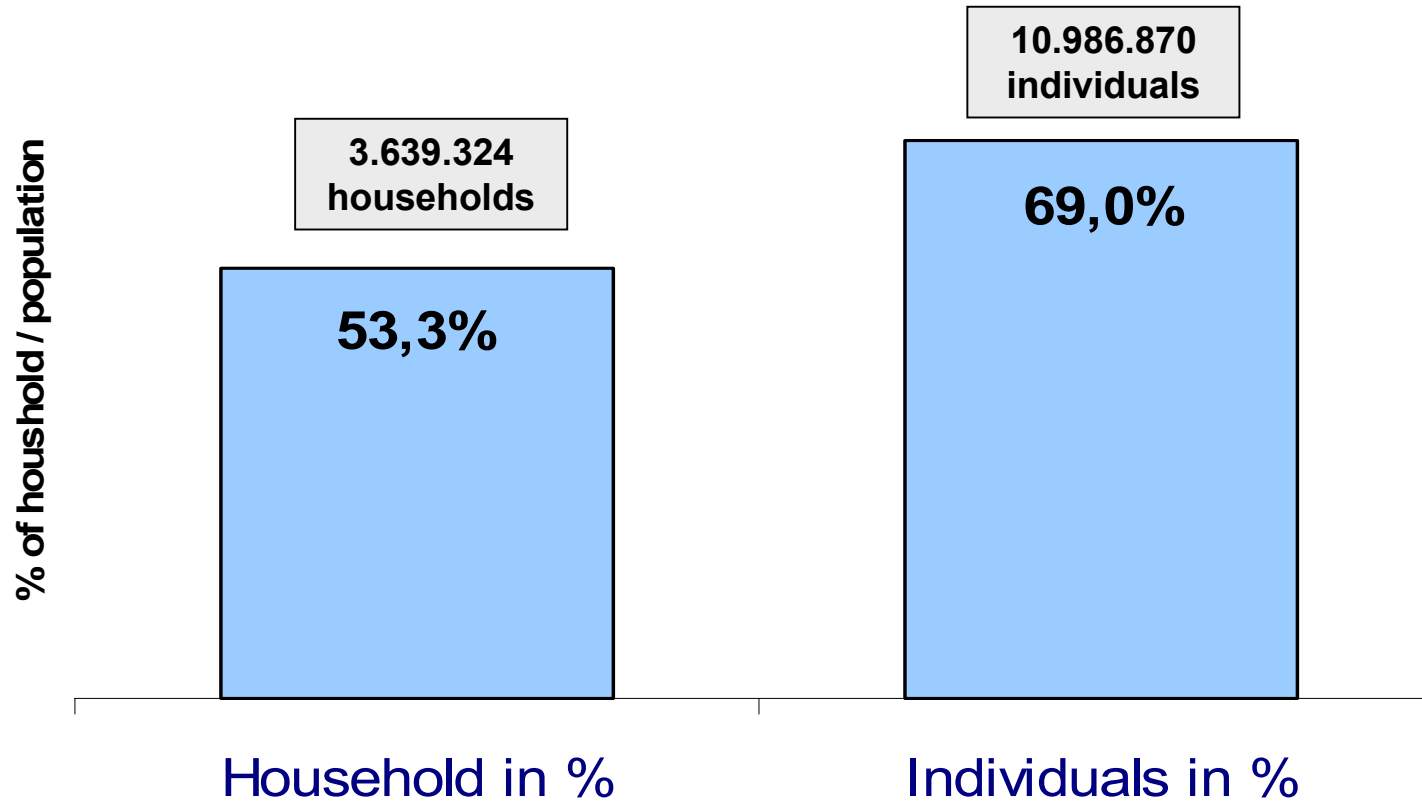
Internet usage in the Netherlands have increased rapidly since September 1999. The country's healthy economy, solid communication infrastructure, and multilingual population have resulted in a high Internet penetration rate.

No data are given about the number of websites allowing local ad messages. No data has been collected about the number of Internet connections, since the number of connections is not a collected data. Instead we have given an indication of the PC's equipment. Please take into account that PC equipment doesn't necessarily mean internet connection.

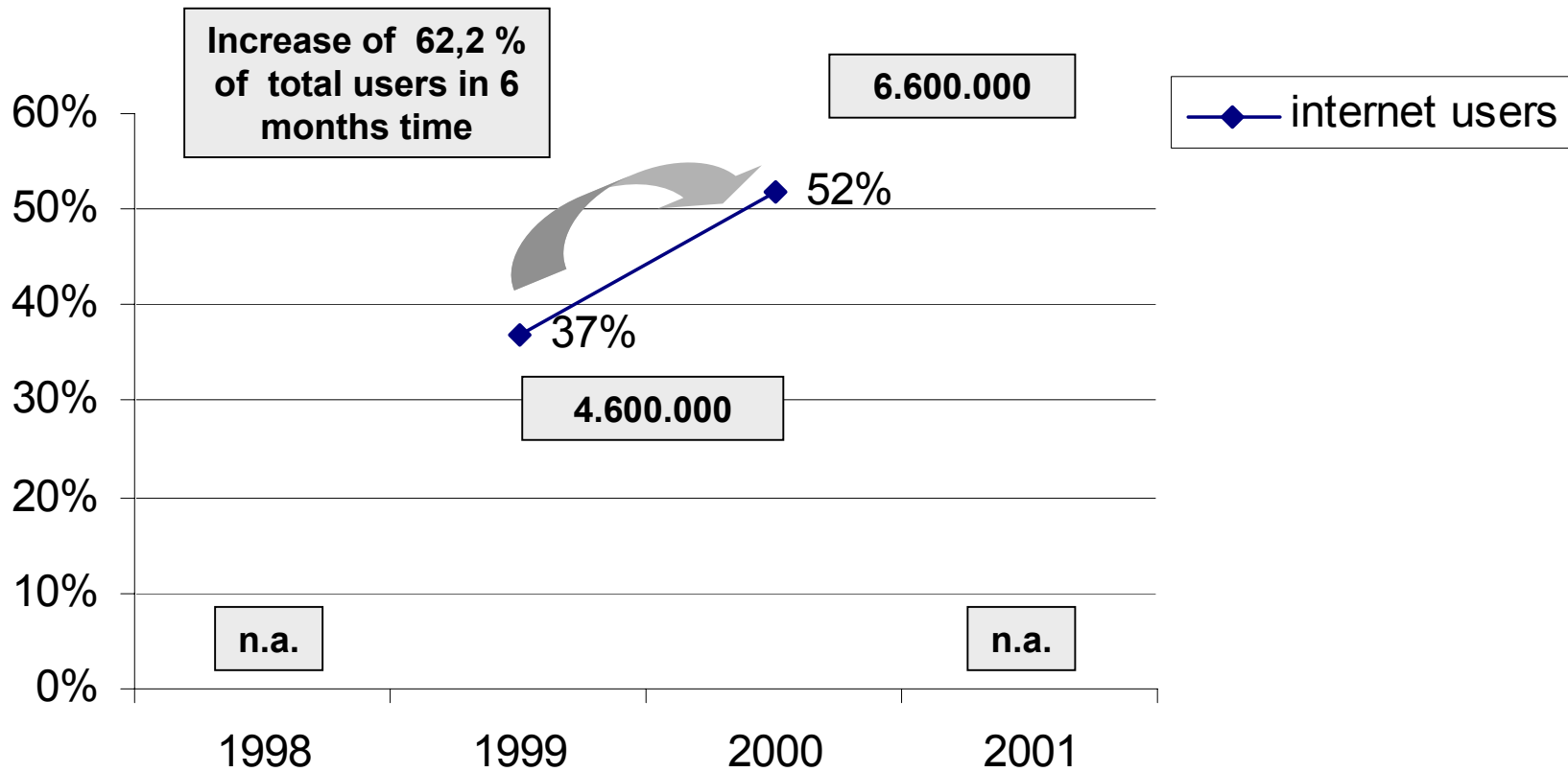
---

## 6.2. General indicators

# PC equipment



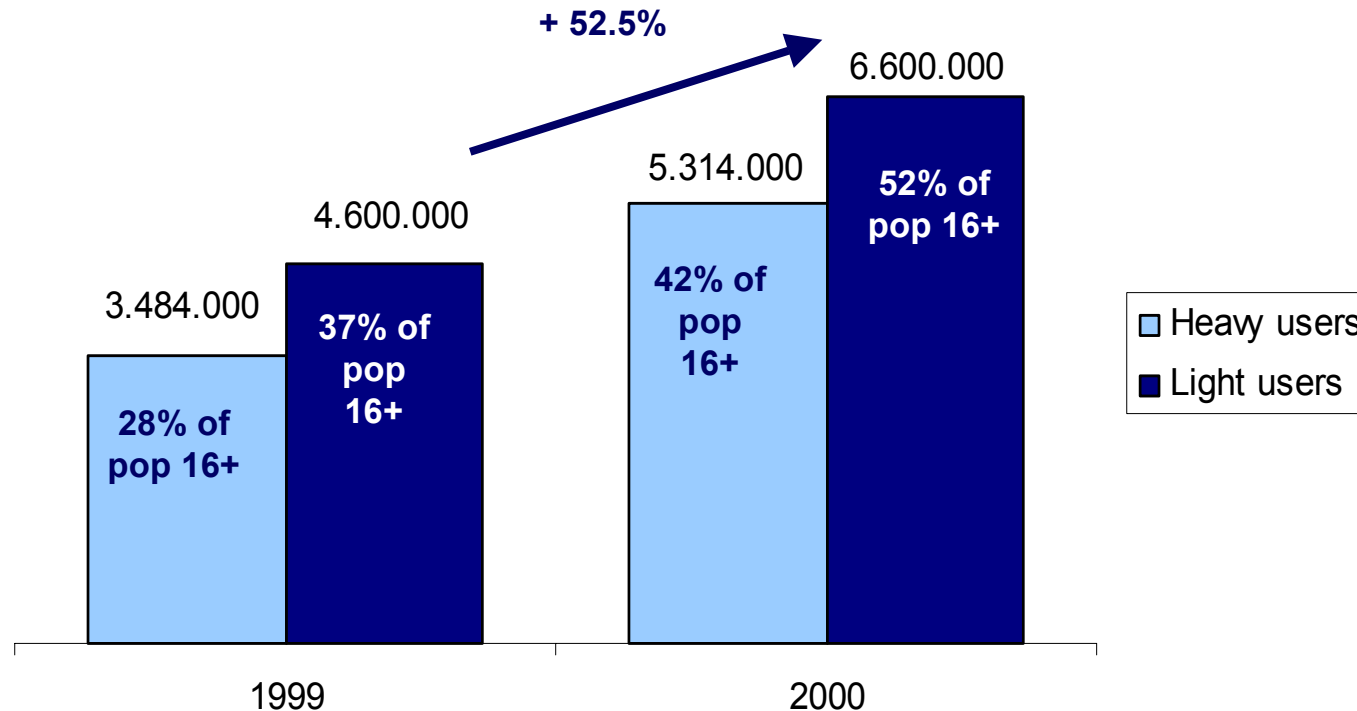
# Internet users (adults 16+) = have used internet at least once



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## 6.3. Audiences

# Usage frequency (all users 16+) ...



Heavy users = who have accessed the internet at least once a week

Light users = who have used the Internet at least once

## ... and media consumption

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<u>Average</u>	
<b>sessions/month</b>	<b>minutes/session</b>
15	28

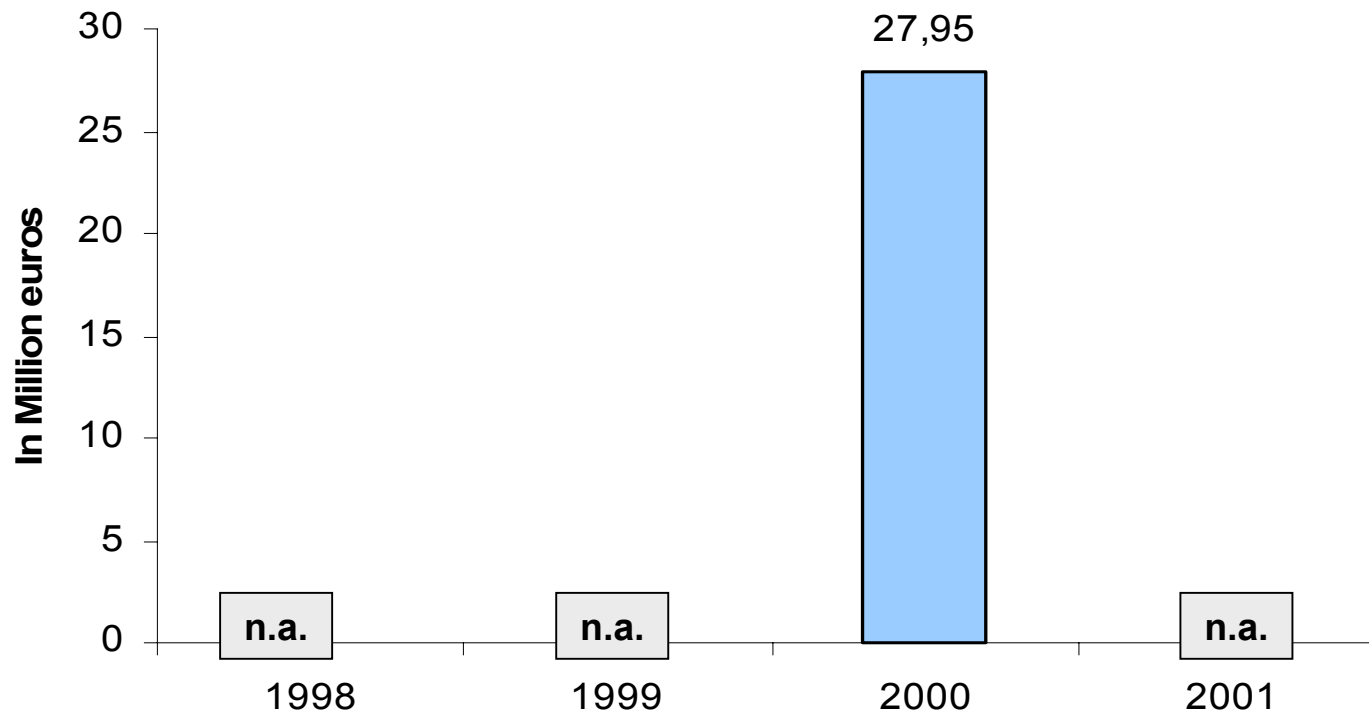
- Nielsen Netratings is only active since December 2000 ⇒ data for 2000 is not available :
  - daily audiences (impressions, pageviews, ...)
  - concerning the proportion of pageviews during WE and working days.

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## 6.4. Media investments



# Total online media investments



Note : estimations of online revenues but takes into account less than 60% of total online saleshouses, and don't take into account websites with integrated saleshouses

# Total online media investments (2)

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- Comments :
  - Valuable figures for online investments in the Netherlands are not available.
  - Independant sources (as for example IAB) do not offer media investments figures.
  - Projects are existing to launch in 2002 an official online barometer, but no date of launch or methodology can be given.
  - No figures available per creative format, as they are not collected.

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
MSN	Microsoft Benelux	Site owner/ editor
Telegraaf	Telegraaf Dagblad BV	Site owner/ editor
Lycos	Lycos Netherlands BV	Site owner/ editor
Funda	Funda NV	Site owner/ editor
Planet Internet	Planet Media Group	Site owner/ editor
Ilse	VNU	Local sales house
Ster	Ster	Local sales house
Wegener I media	Wegener	Local sales house
IP media	IP Media	Local sales house
Webads	Webads	Local sales house
Double Click	Double Click Europe	Sales house part of an int. group
247 Europe	247 Europe	Sales house part of an int. group
Btlooksmart	BtLooksmart	Sales house part of an int. group
Adlink	Adlink	Sales house part of an int. group
Admaster	Admaster	Sales house part of an int. group
Bright Alley	NOB	Ad / communication agency
VNU	VNU	Mixed ownership
Webads	Private partners	Mixed ownership
Adpepper	Adpepper	Others
AOL Benelux	AOL, Compuserver, Netscape	Others
Netdirect	Netdirect	Others
IDG	IDG	Others
Glamago	Glamago	Others

---

## 6.6. Glossary

# Definitions of creative formats

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- Standard banners :
  - A rectangular ad usually appearing at the top or bottom of a web page.
- Pop ups :
  - This ad will appear in a corner of the screen. Users can dismiss the pop-up by clicking it out.
- Keywords searches :
  - A word or series of words that describe a page or site
- Newsletters / Ad e-mails
  - An email newsletter is a publication by a business or individual and then sent out to people by request. These newsletter can contain ads in words or even banners.

# Definitions of creative formats (2)

---

- Rich media advertising :
  - Ads incorporating video, audio and other technology components beyond simple animation.
  - Rich media is considered higher bandwidth advertising that delivers more of a brand impact.
- Interstitials/ Superstitials :
  - Interstitials are advertisements that pop onto the screen and interrupt users.
- Advertorials / pages Sponsorings :
  - An advertorial is a sponsorship that looks more like a editorial than like an advertisement.





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# Internet : Spain

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## 6.1. Introduction

# Introduction

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Spain ⇒ comments :

Internet has been present in Spain for several years, but its evolution is still in the early stages. The increase in its use and penetration continues daily. The country's slow development of access is due to an outdated infrastructure : as well low PC penetration in households, as high charge local rates (monopoly of Telefonica till end 1998). Spanish internauts are less experienced as in other countries.

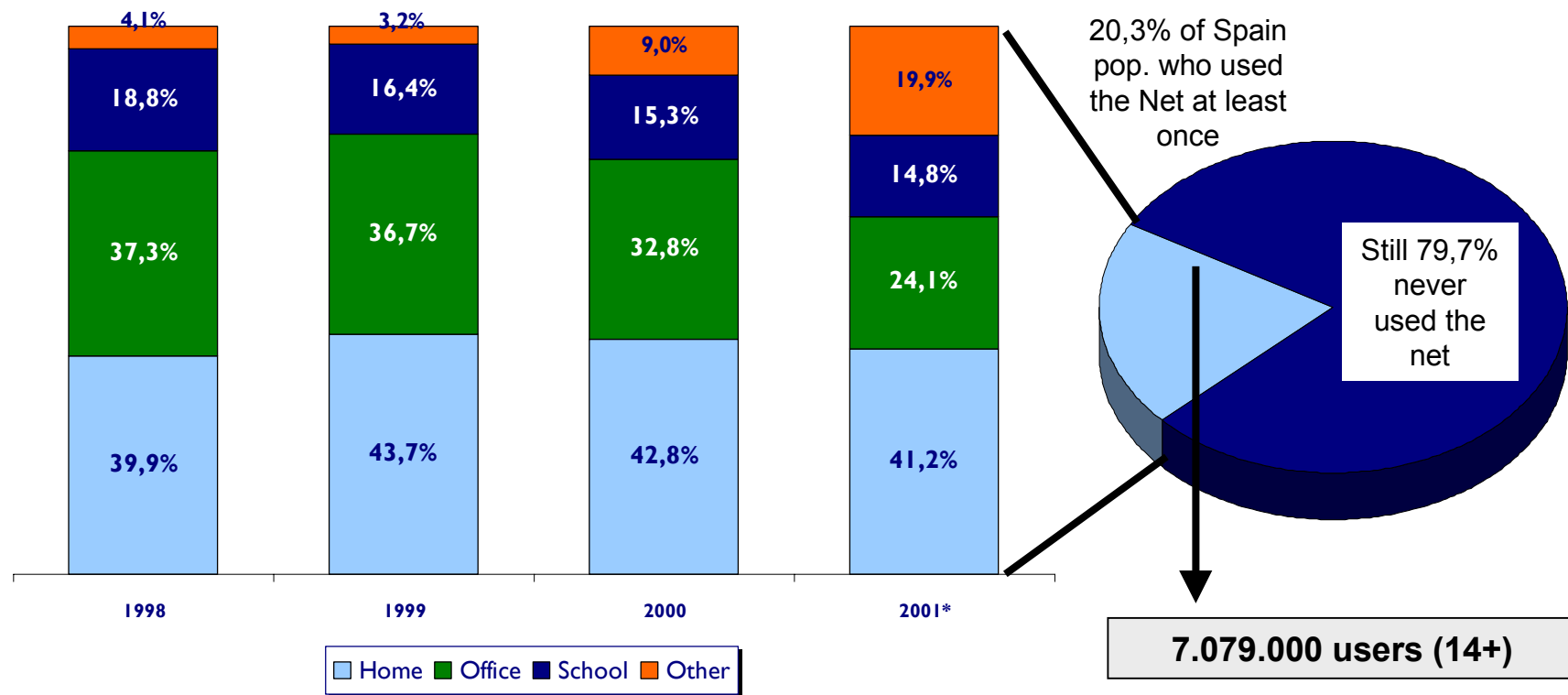
Due to a low disposable income and the high rate of unemployment in Spain, it is estimated that the internet will develop at a slower pace compared to the rest of Europe.

No indication can be given about the number of local websites accepting advertising : as in other countries, only rough estimations can be given, as the emergence or disappearance of websites is a daily event.

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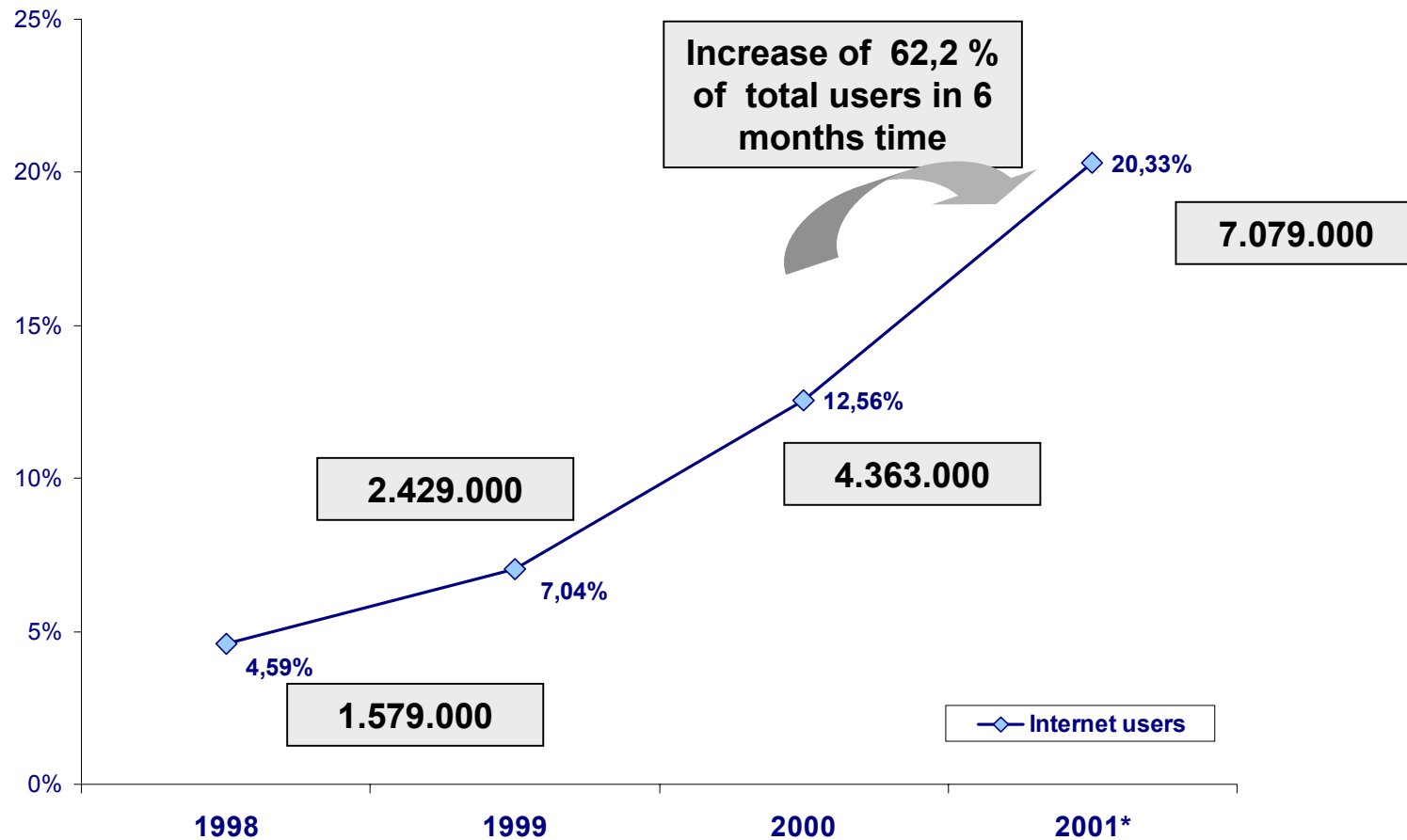
## 6.2. General indications

# Number of Internet connections (PC/Mac) - 14+



This represent a total number of 10.137.890 available connections (duplication included). An increase of 67.6% in 6 months time, compared to end 2000.

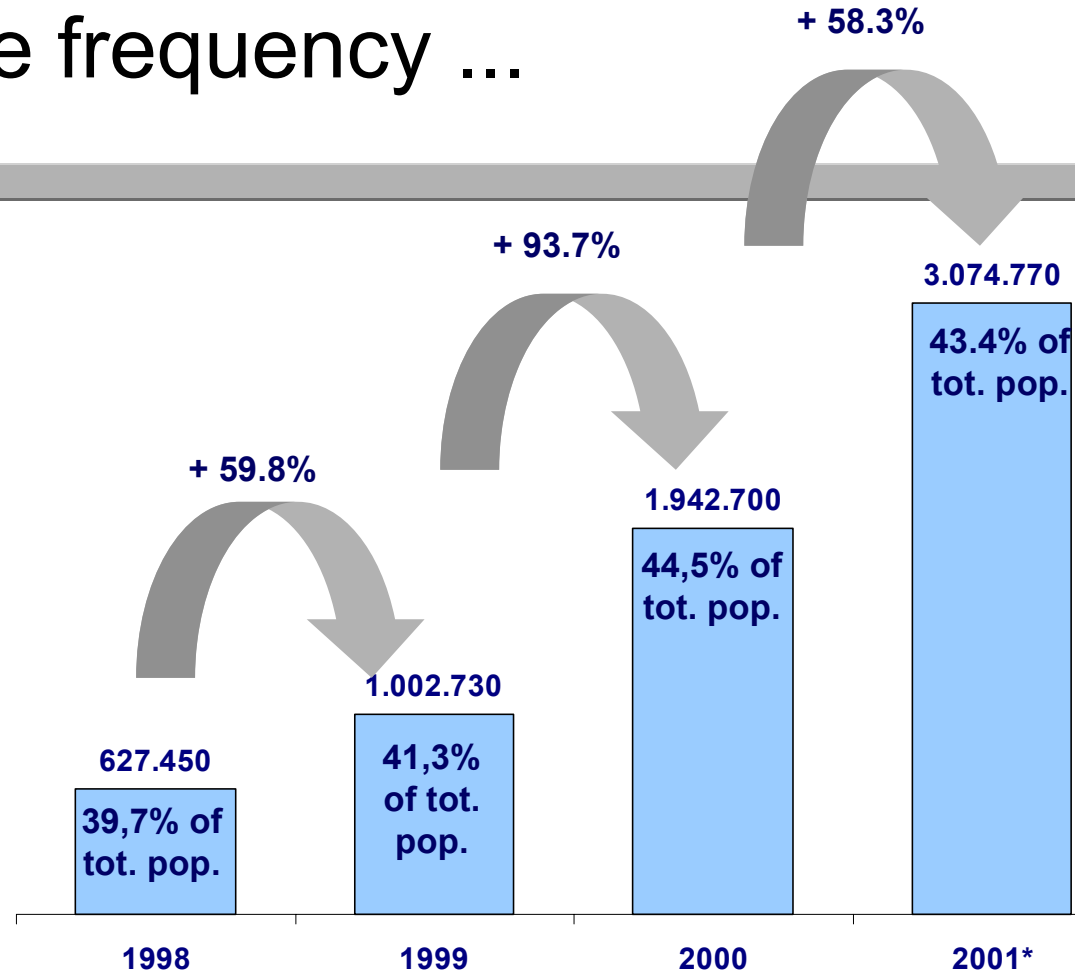
# Internet users (adults 14+) = uses internet once in a while



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## 6.3. Audiences

# Usage frequency ...



Average daily users (connected to internet yesterday).



## ... and media consumption

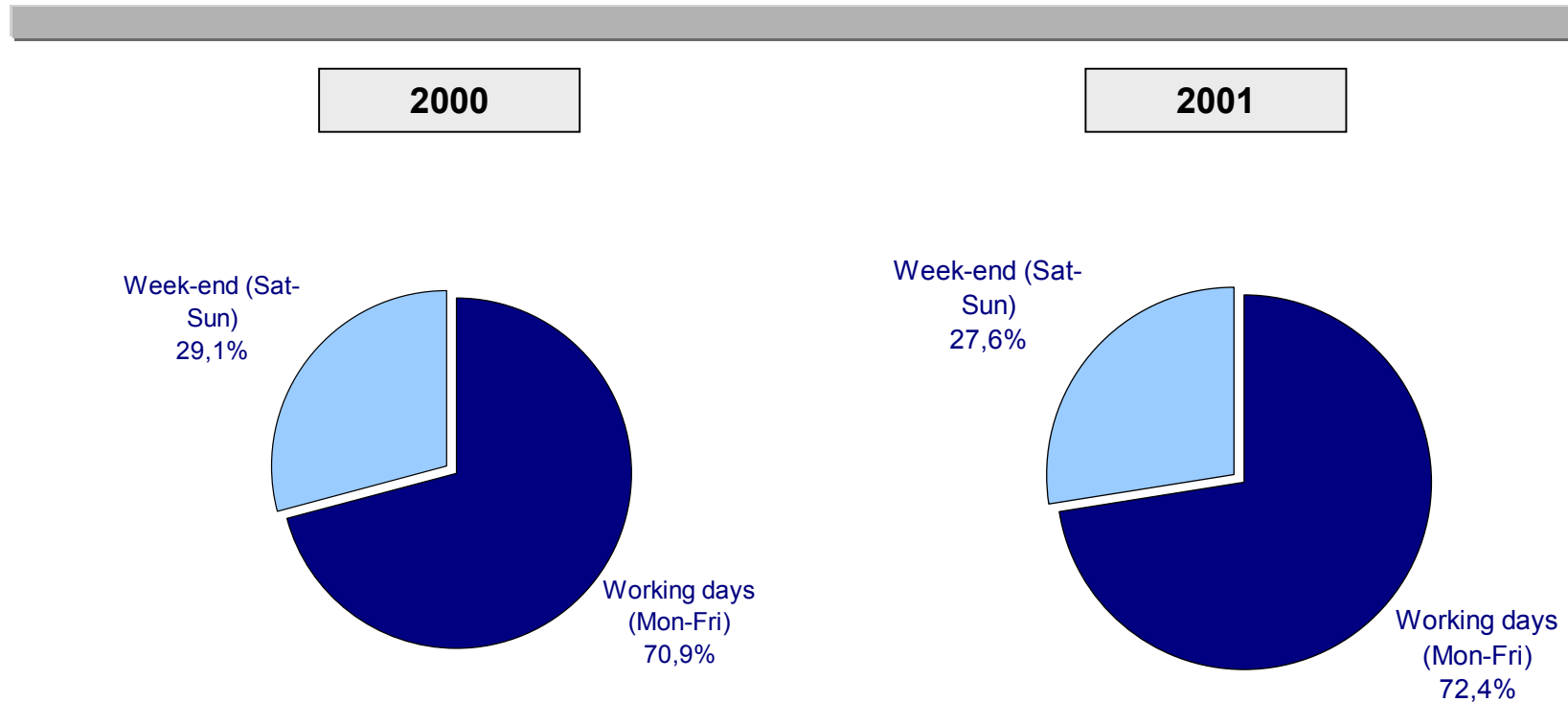
<u>Average</u>			
daily pageviews per user		daily duration online	
2000	2001*	2000	2001
16,9	17,4	55 min	na

Average days per month spent online : 11.2 days for 2000 (no data for 2001).

No distinction is made between the time spent online for private and for professional purposes (a split can be made between the duration during working days and WE, but doesn't give the reason of usage).

No data available for daily impressions per user.

# Proportion for pageviews Week vs WE



A small shift occurred from 2000 to 2001 : the number of pageviews has increased during working days in 2001.

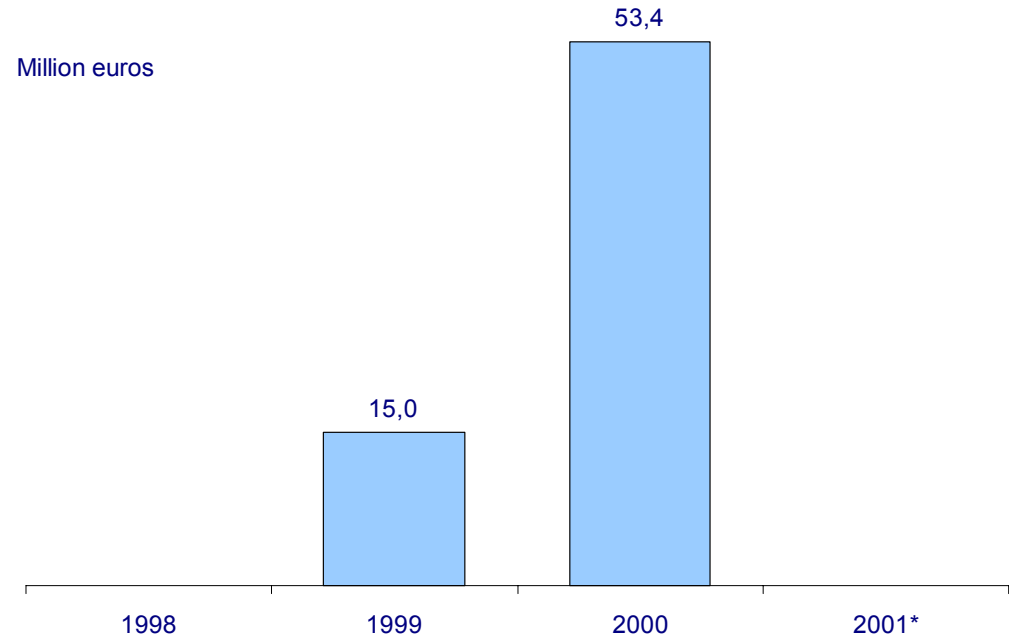
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## 6.4. Media investments

# Total online media investments

## Growth evolution and comments :

- The data collection started in 1999
- Between 1999 and 2000, internet adspend grew with 255.7%
- For 2001 : data is not collected yet, but the growth index will not be at the same level as the growth evaluated between 1999 and 2000.



No split of investments per creative format : data not available as the control of investments do not exist yet.

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
ANTENA 3	ANTENA 3	Local sales house
ABC	ABC	Local sales house
EFE	EFE	Local sales house
EL MUNDO	EL MUNDO	Local sales house
GDM GERENCIA DE MEDIOS	GRUPO PRISA	Local sales house
GRUPO CORREO	GRUPO CORREO	Local sales house
GRUPO ZETA	GRUPO ZETA	Local sales house
ERESMAS	N/A	Local sales house
HISPAVISTA	N/A	Local sales house
LA VANGUARDIA	LA VANGUARDIA	Local sales house
LANETRO	LANETRO S.A.	Local sales house
NAVEGALIA	AIRTEL	Local sales house
NOVOMEDIA	N/A	Local sales house
PUBLIMEDIA	PUBLIESPAÑA	Local sales house
RECOLETOS	GRUPO PEARSON	Local sales house
TERRA	GRUPO TELEFONICA	Local sales house
TPI	GRUPO TELEFONICA	Local sales house
HI MEDIA	HI MEDIA FRANCE	Local sales house
24/7 MEDIA ESPAÑA, S.A.	N/A	Sales house part of an int. Group (USA)
AD PEPPER MEDIA SPAIN, S.A.	AD PEPPER MEDIA INTERNATIONAL	Sales house part of an int. Group (USA)

# Commercial offer 2001

Sales houses	Owner	Status
ADLINK INTERNET MEDIA	UNITED INTERNET AG NETWORK	Sales house part of an int. Group (GERMANY)
BPE (V NUNET)	N/A	Sales house part of an int. Group (FRANCE)
BUONGIORNO	BUONGIORNO	Sales house part of an int. Group (ITALY)
DOUBLECLICK NET ADVERTISING	DOUBLECLICK INC.	Sales house part of an int. Group (USA)
EN FEMENINO	AU FEMENIN S.A.	Sales house part of an int. Group (FRANCE)
I-NETWORK	HAVAS ADVERTISING GROUP	Sales house part of an int. Group
I-BAZAR	EBAY GROUP	Sales house part of an int. Group (FRANCE)
MSN	MSN	Sales house part of an int. Group (USA)
REAL MEDIA	PUBLIGROUPE	Sales house part of an int. Group (USA)
TISCALI	TISCALI GROUP	Sales house part of an int. Group (ITALY)
YA.COM	T-ONLINE	Sales house part of an int. Group (GERMANY)
VIAPOLIS	VIAPOLIS	Sales house part of an int. Group (FRANCE)
STARMEDIA	STARMEDIA NETWORK INC.	Ad / communication agency (USA)
LYCOS ESPAÑA S.A.	BERTELSMAN/LYCOS INC.	Mixed ownership

# Top 10 websites Spain

Websites	Unique visitors	Reach %
1. Terra.es	1 766 769	48,1
2. MSN.com	1 607 583	43,77
3. Microsoft.com	1 405 809	38,28
4. Passport.com	1 315 868	35,83
5. MSN.es	1 242 146	33,82
6. Yahoo.es	1 099 380	29,93
7. Ya.com	1 027 183	27,97
8. Google.com	1 002 211	27,29
9. Geocities.com	971 126	26,44
10. Yahoo.com	946 219	25,76



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## 6.6. Glossary

# Definitions of creative formats

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- **Rich Media Banners:**
  - Standard banners (468x60 pixels-15Kb) which use rich media technologies such as HTML, Flash and Java.
- **Rollover Expand Banners:**
  - A banner may expand to as large as 468x240 after a user moves their cursor over it, and should automatically close when the cursor moves off the banner.
- **Click Expand Banners:**
  - A banner may expand to as large as 468x240 after a user clicks on it, and can stay expanded until the user clicks a clearly labeled "close" button.
- **Audio/Video Banners:**
  - A banner may play audio and/or video content after a user clicks on it, and should display a visible "stop" or "pause" button once the audio/video begins.

# Definitions of creative formats

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- Pop-up
  - Pop-ups automatically launch in a new browser window when a Web page is loaded. (250\*250 - 20Kb or 550\*550 - 100k)
- Interstitials/ Superstitials :
  - Transitional Ads (also called "interstitials") appear in the main browser window between two Web pages.(336\*280 - 20Kb)
- Rich Media IMU Rectangles
  - Interactive Marketing Units (336x280, 300x250, 180x150 or 240x400 pixels), which use rich media technologies such as HTML, Flash and Java.
- Rich Media IMU Skyscrapers
  - Interactive Marketing Units (120x600 or 160x600 pixels) which use rich media technologies such as HTML, Flash and Java.



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# Internet : Sweden

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## 6.1. Introduction

# Introduction

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Sweden ⇒ comments :

Access to internet has developed rapidly in Sweden during the past few years. The growth rate is estimated to slow down in the coming years , and this would be an indication that the demand for internet is beginning to be filled. The increase is reflected in all age groups.

Investment growth ratios were important till 2000, due to the boom of the dotcoms. But since 2001, a slowdown in investments have occurred, and the triple digit growth has slowed down as in other countries. This is mainly due to the disappearance of dotcoms as online investors and the slowdown in investments of traditional companies. Estimation are given that the total Internet spend will decrease with 13% compared to 2000.

A few sales houses have disappeared from the market, as the Swedish market is not big enough for all sales houses. Quite often the media space is sold at loss for the media; this will lead to higher technical costs for the sales house, compared to the revenue they get from the advertisers.

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## 6.2. General indicators



# Number of sites allowing local ad messages

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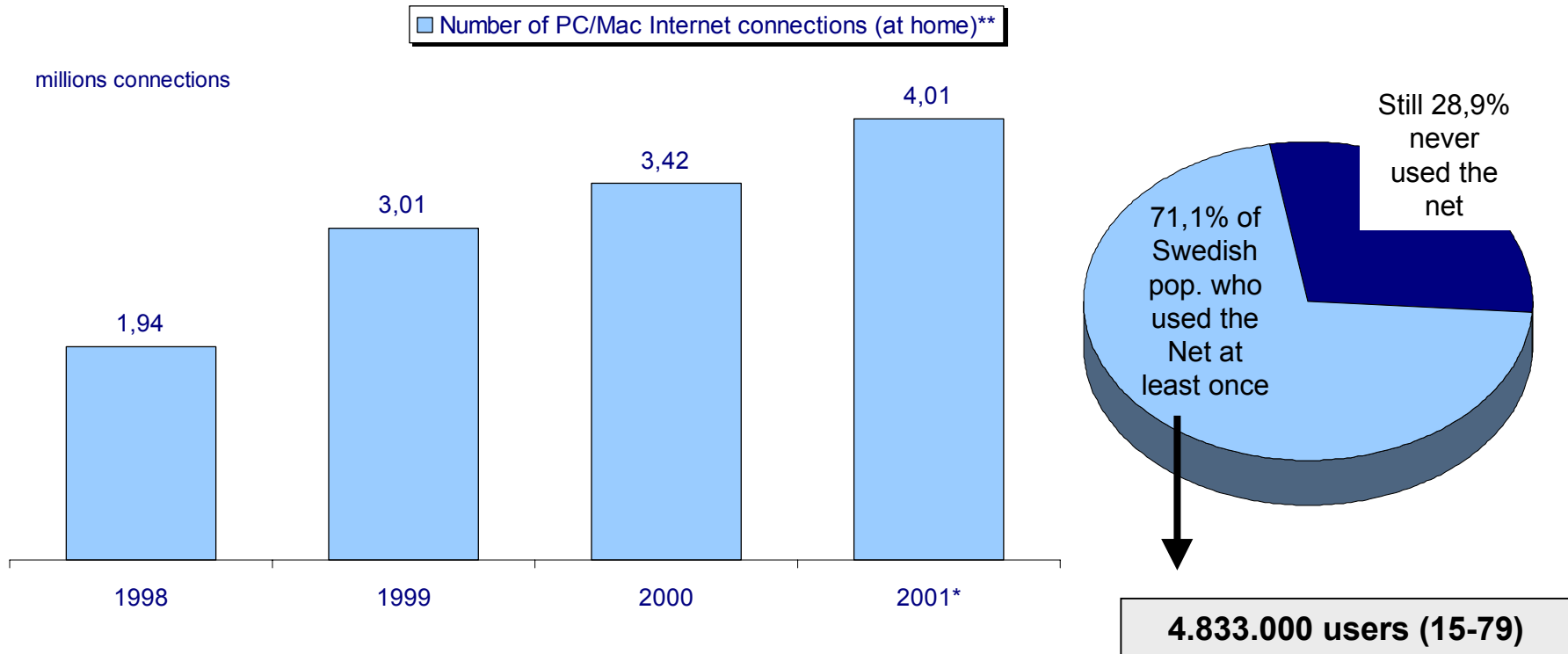
⇒ From 1998 till 2000 : no data available

⇒ 2001\* : ± 500 websites are listed as allowing local ad-messages\*\*

\*\* Source : IRM (Institute for Advertising and Media Statistics). Are taken into account : websites represented by integrated/global media saleshouses (no exchange deals)

⇒ Estimates remain rough : as in other countries the battle to survive is tough for websites, and websites appears and disappears rapidly. Websites with revenue models based on advertising income are the most probable to disappear, as the growth of advertising revenues have slowed down, and the revenues must be divided amongst all existant websites.

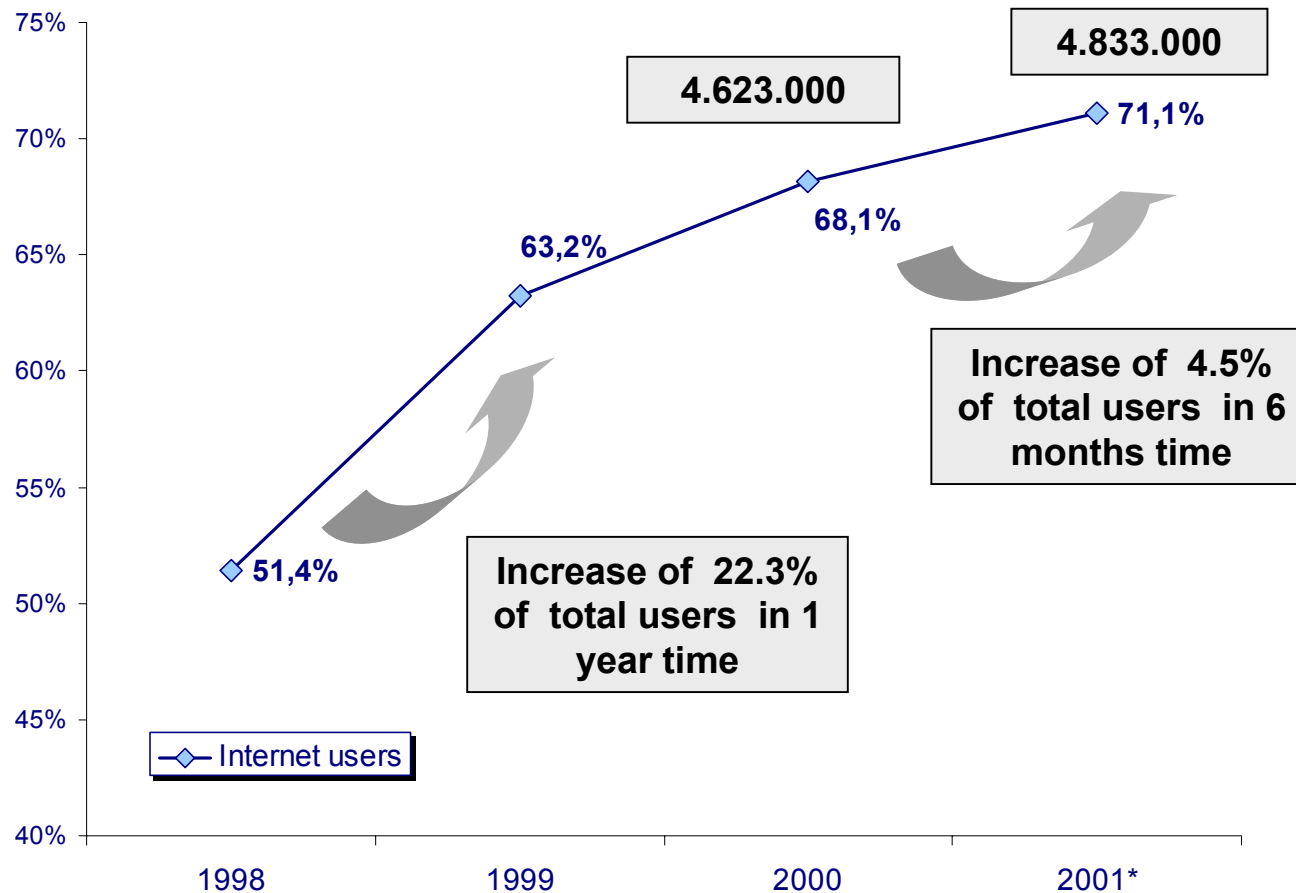
# Number of Internet connections (PC/Mac) - 15-79 years



Access to internet has developed rapidly, and very soon, and the growth rate is now slowing down → the demand for internet is beginning to be filled.

# Internet users

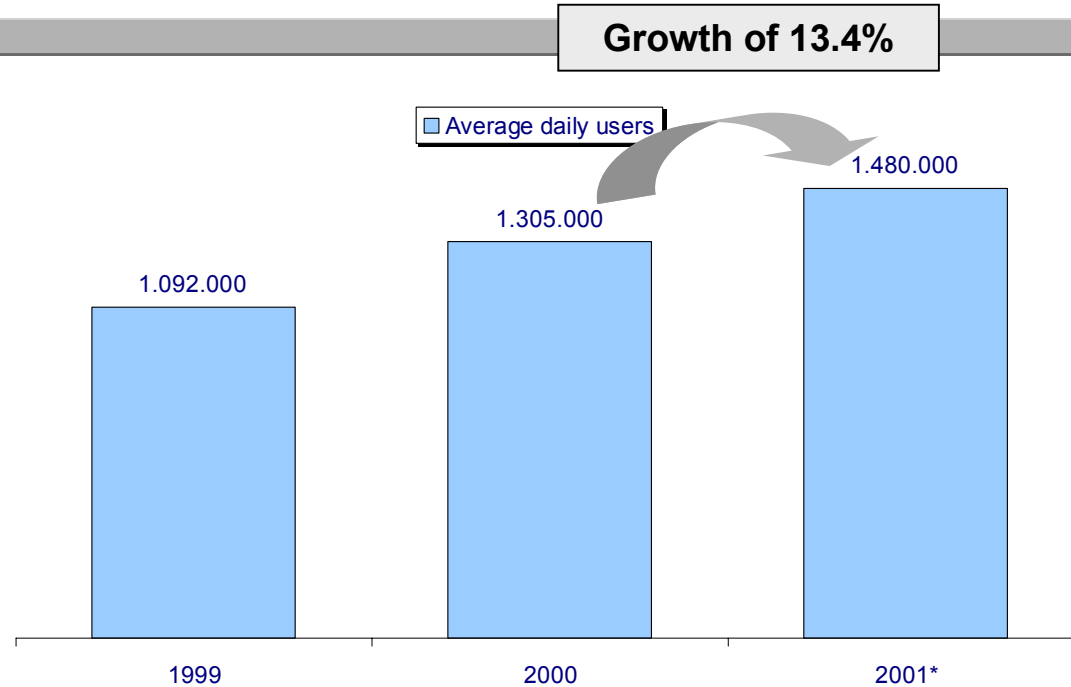
(adults 15-79) = uses internet once in a while



---

## 6.3. Audiences

# Usage frequency ...

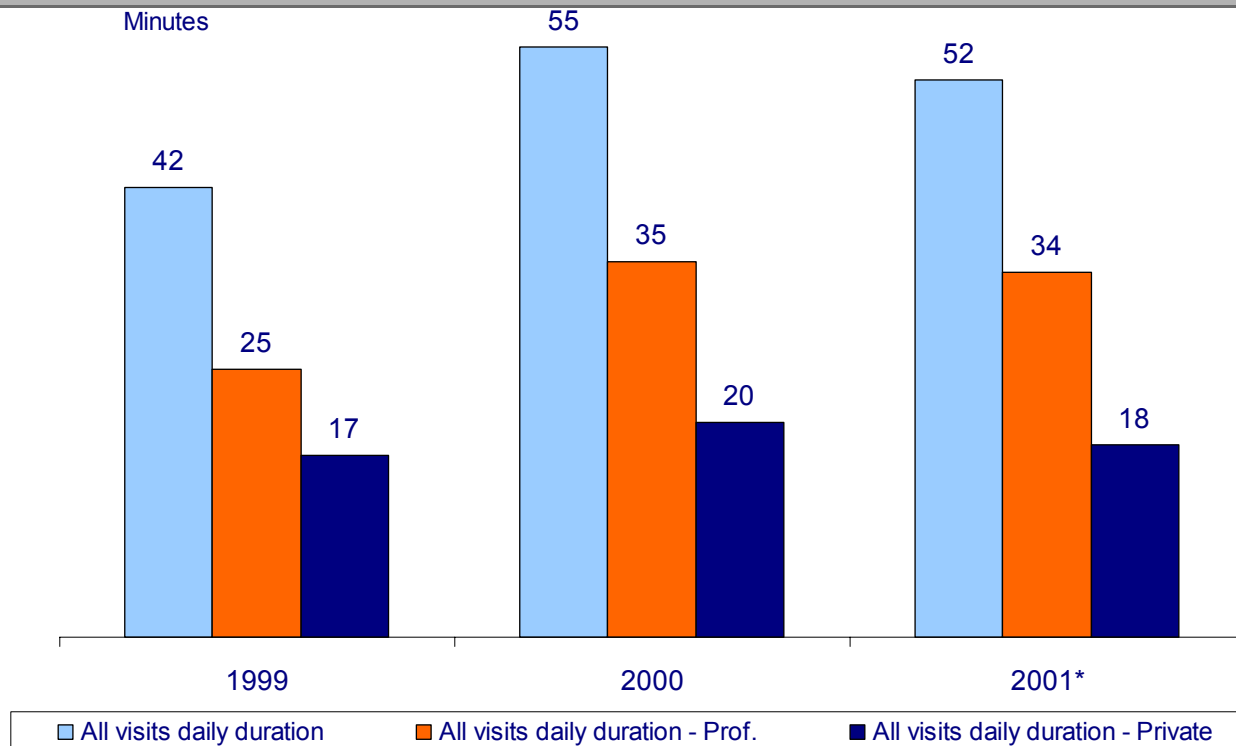


Average daily users tend to increase : internet becomes a daily used tool.

The development of an official audience measuring tool in Sweden projected for Q4 2001. This project (KIA = Committee for Internet Advertising) should cover 90% of the local websites.

# ... and media consumption

## Average DAILY duration on Web

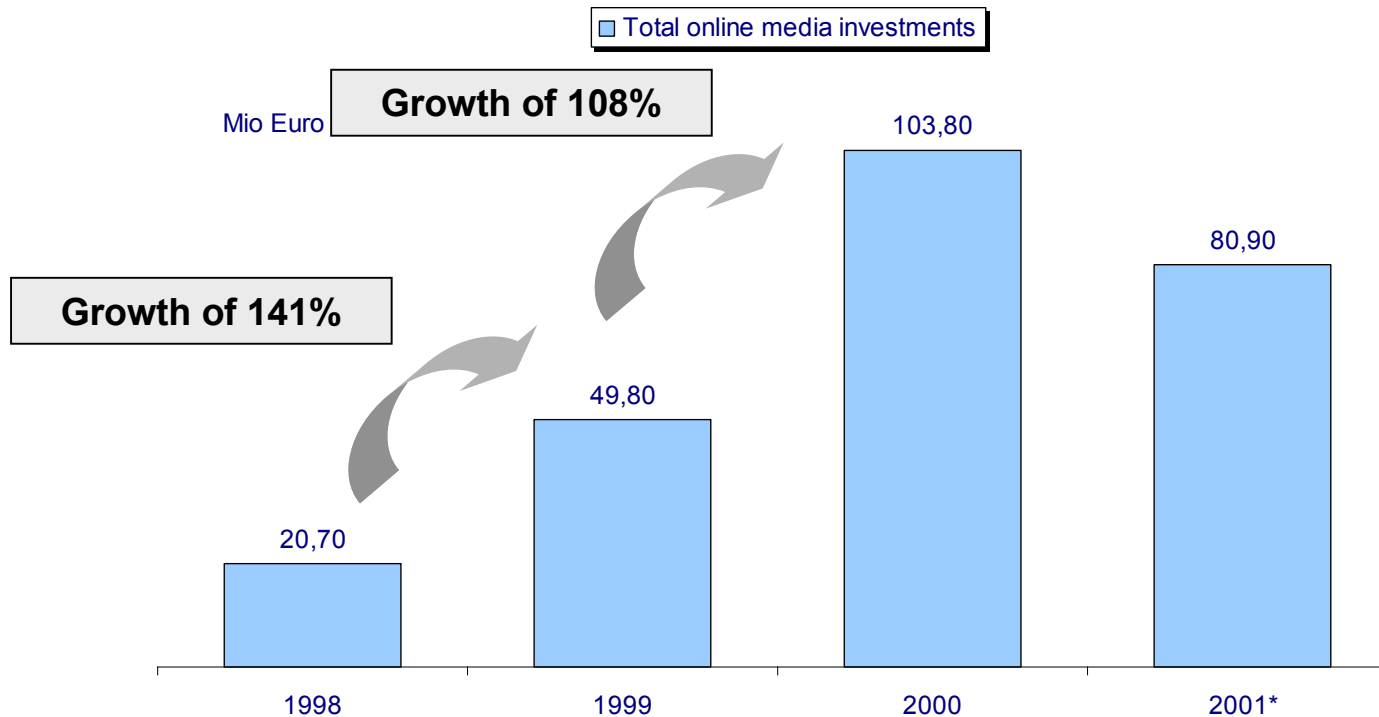


The development of an official audience measuring tool in Sweden projected for Q4 2001. This project (KIA = Committee for Internet Advertising) should cover 90% of the local websites. Other clue data's are not available (Average daily pages views per user, average daily impressions per user, proportion of pageviews working days versus week-ends)

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## 6.4. Media investments

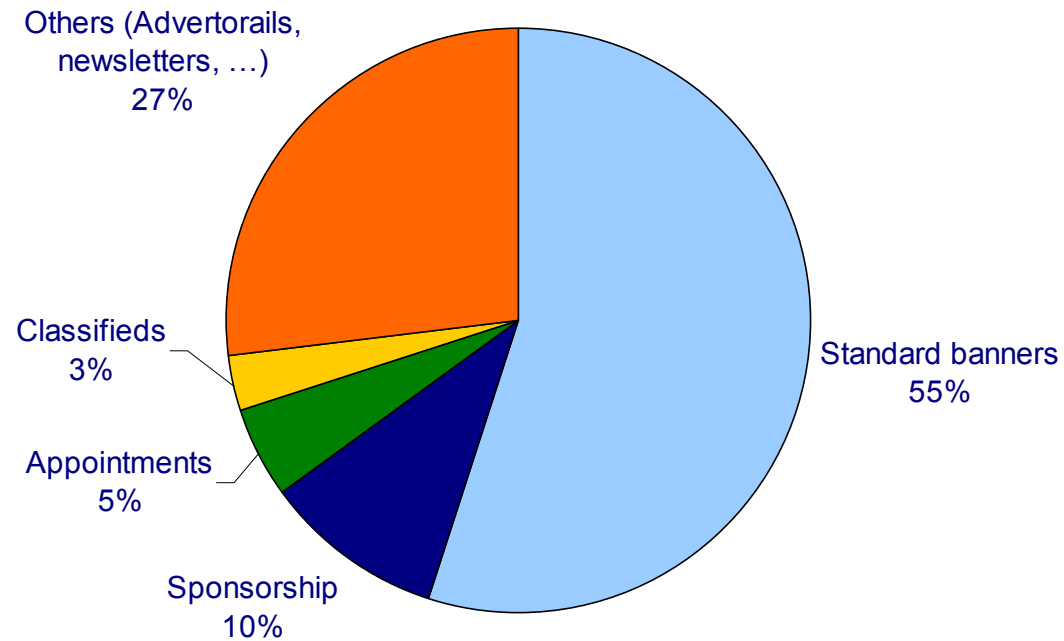
# Total online media investments



Online investments were outstanding till 2000. This boom was mainly due to the Dotcoms and the Private Pension Plan. The recession of investments (mainly due to the disappearance of dot-coms) should cause a huge drop in growth indexes.



# Investments per creative formats



The standard banner remains the most commonly used format !

No specific survey is collecting this data : projects for creative measurements are planned for end 2002, and years prior to 2001 are not available.

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## 6.5. Commercial offer

# Commercial offer 2001

Sales houses	Owner	Status
Spray/Lycos	Lycos Europe	Site owner/ editor
Passagen	Scandinavia Online	Site owner/ editor
Aftonbladet	Aftonbladet Hierta AB	Site owner/ editor
Msn	Microsoft	Site owner/ editor
Funplanet	Funplanet AB	Site owner/ editor
Torget	Svenska Torget AB	Site owner/ editor
IDG	IDG	Site owner/ editor
Lunarstorm	LunarWorks AB	Site owner/ editor
Internetsäljarna	Stadsporten Internetsäljarna AB	Local sales house
MTG New Media	Modern Times Group	Local sales house
fi-net	FL-NET AB	Local sales house
Derigo	Derigo Media AB	Local sales house
Adlink	AdLink Internet Media AG	Sales house part of an int. group
Ad pepper	Ad Pepper Media	Sales house part of an int. group
Doubleclick	Doubleclick	Sales house part of an int. group
Hi-Media	Hi-Media Scandinavia AB	Sales house part of an int. group
Dayrates	Dayrates	Sales house part of an int. group
nr1	Owner	Ad / communication agency
Tikada	Comma AB and Compost Marketing AB	Mixed ownership
Dobedo/Chili	euro909.com, Investor AB, Arts Alliance	Mixed ownership
BT LookSmart	British Telecom and Looksmart	Mixed ownership

# Top 10 websites Sweden

Websites	Unique visitors	Reach %
1. MSN.se	2 244 000	49,4
2. Microsoft.com	2 191 000	48,3
3. Aftonbladet.se	1 619 000	35,7
4. Passagen.se	1 613 000	35,5
5. Hotmail.com	1 533 000	33,8
6. Telia.com	1 316 000	29
7. Spray.se	121 000	26,7
8. TV4.se	1 194 000	26,3
9. Foreningssparbanken.se	1 178 000	26
10. Yahoo.com	1 099 000	24,2

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## 6.6. Glossary

# Definitions of creative formats

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- Standard banners
    - Standard online advertising format (468\*60 pixels)
  - Sponsorships
    - Presence of advertiser on website using several creative formats (choice of banner, button, ...)
  - Appointments
    - Presence on jobsites
  - Classifieds
    - Classified ads : houses to rent, used cars, ...
  - Pop ups
    - n.a.
  - Keywords searches
    - Advertising is showed after request on specific words (ex. "Cars" -> car advertising is showed in HTML format or textlink)
-

# Definitions of creative formats

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- Newsletters / Ad e-mails
  - Advertising format included in website newsletter (in text or HTML)
- Rich media advertising
  - All formats using Rich media techniques (enliven, ...)
- Interstitials/ Superstitials
  - Webpage appears in the main browser window between 2 webpages
- Advertorials / pages Sponsorings
  - Advertising message is included in editorail content/same concept as sponsorship