

European Interactive Advertising Association

European Ad Formats Report

April 2007



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Presentation agenda

1. Introduction
2. Ad formats analysed
3. Availability of Ad Formats across EIAA and OPA Europe members' sites
4. Popularity and growth of Ad Formats across Europe
5. Usage of formats across different countries analysed on EIAA members' sites
6. Conclusions



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1. Introduction

The European Ad Formats Report from the European Interactive Advertising Association (EIAA) details the usage of specific ad formats on EIAA members' networks and Online Publishers Association Europe (OPA Europe) sites across Europe. To create the report the EIAA analysed over 300 billion online ad impressions delivered between July and December 2006.

- The members of the EIAA currently include: AD Europe, AdLINK Internet Media AG, AOL Europe, Microsoft Digital Advertising Solutions, Tiscali, Yahoo! Europe, LYCOS Europe and wunderLOOP. The EIAA members' networks account for 79% of the European online audience.
- Members of OPA Europe are : 20Minutos.es (Spain), Agora (Poland), BusinessWeek (Europe), CNET Networks (Europe), Gruppo Espresso (Italy), Group Financial Times (Les Echos in France and Financial Times Deutschland in Germany), International Herald Tribune (Europe), Khatimerini (Greece), Le Monde Interactif (France), Le Temps (Switzerland), Prisacom/El País (Spain), RCS Mediagroup (Italy), El Mundo (Spain) and Spiegel Online (Germany).



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2. Ad formats analysed

The analysis highlighted the six most commonly used online ad formats:

- 468 x 60 Traditional Banner
- 120 x 600 Skyscraper
- 160 x 600 Wide Skyscraper
- 180 x 150 Rectangle
- 300 x 250 Medium Rectangle – MPU (Messaging Plus Unit)
- 728 x 90 Super Banner

These six formats represent approximately 85% of all display ad impressions delivered across the combined EIAA and OPA Europe member networks during the six month period.



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Examples of ad formats



Skyscraper
(120 x 600)



Super Banner
(728 x 90)

Medium Rectangle/
MPU (300 x 250)



Rectangle
(180 x 150)



Traditional Banner
(468 x 60)



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3. Ad formats availability across Europe

	Traditional Banner	Skyscraper	Wide Skyscraper	Rectangle	Medium Rectangle - MPU	Super Banner
UK	√	√	√	√	√	√
France	√	√	√	√	√	√
Germany	√	√	√	√	√	√
Italy	√	√	√	√	√	√
Spain	√	√	√	√	√	√
Netherlands	√	√	√	√	√	√
Belgium	√	√	√	√	√	√
Denmark	√	√	√	√	√	√
Sweden	√	√	√	√	√	√
Norway	√	√	√	√	√	√
Austria	√	√	√	X	√	√
Switzerland	√	√	√	√	√	√
Czech Republic	√	√	X	X	X	X
Poland	√	√	√	X	√	√
Greece	√	√	√	X	√	√



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All 6 ad formats are available in 11 out of the 15 countries studied



4. Popularity and growth of ad formats across Europe

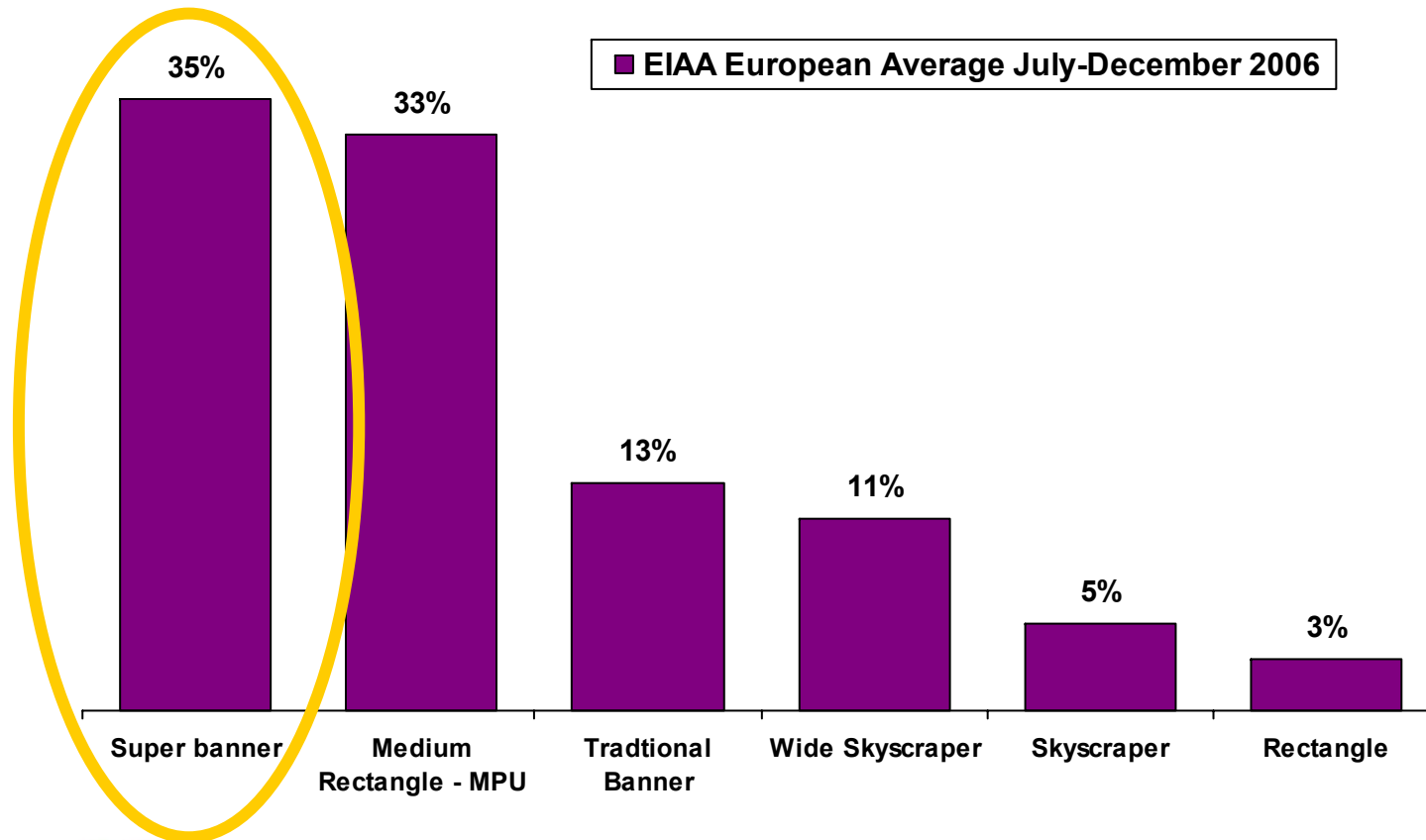
- According to EIAA member data, use of the Super Banner and Medium Rectangle – MPU formats rose substantially across Europe in the last six months of 2006 compared to the first half of the year.
 - Across Europe, the Traditional Banner has seen a relative slump in popularity, sinking to 13% (Jul-Dec 2006) of the total of these ad formats delivered from 21% (Jan-Jun 2006).
 - The larger package 728 x 90 Super Banner now represents 35% (up from 28%, Jan-Jun 2006) of formats delivered
 - The 300 x 250 Medium Rectangle – MPU also accounts for a third (33% up from 27%).
- The OPA Europe figures demonstrate an even greater concentration on the bolder formats with the Super Banner and Medium Rectangle - MPU accounting for 86% of the formats delivered



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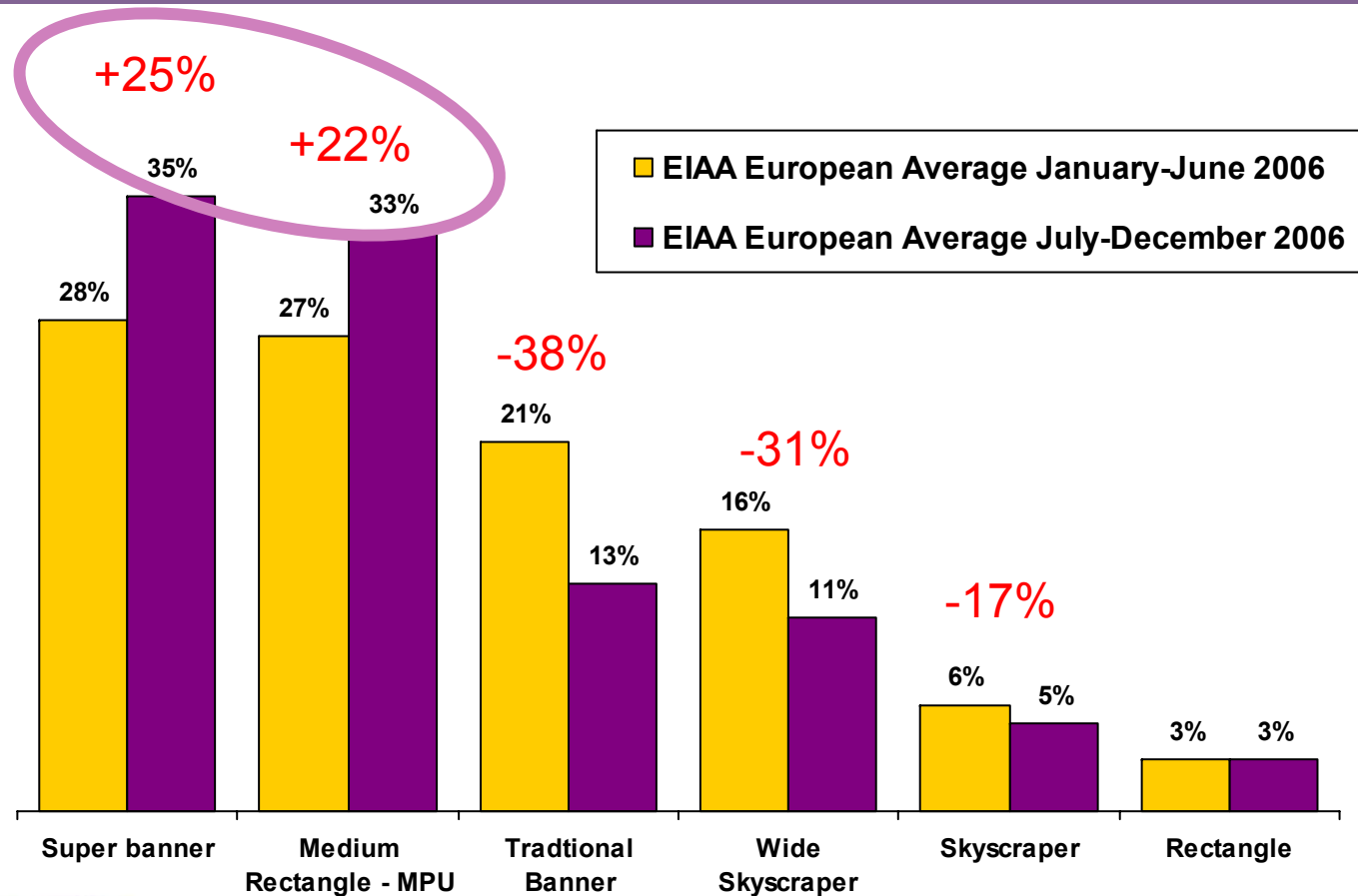
The most popular ad format across EIAA members' sites in Europe is the Super Banner



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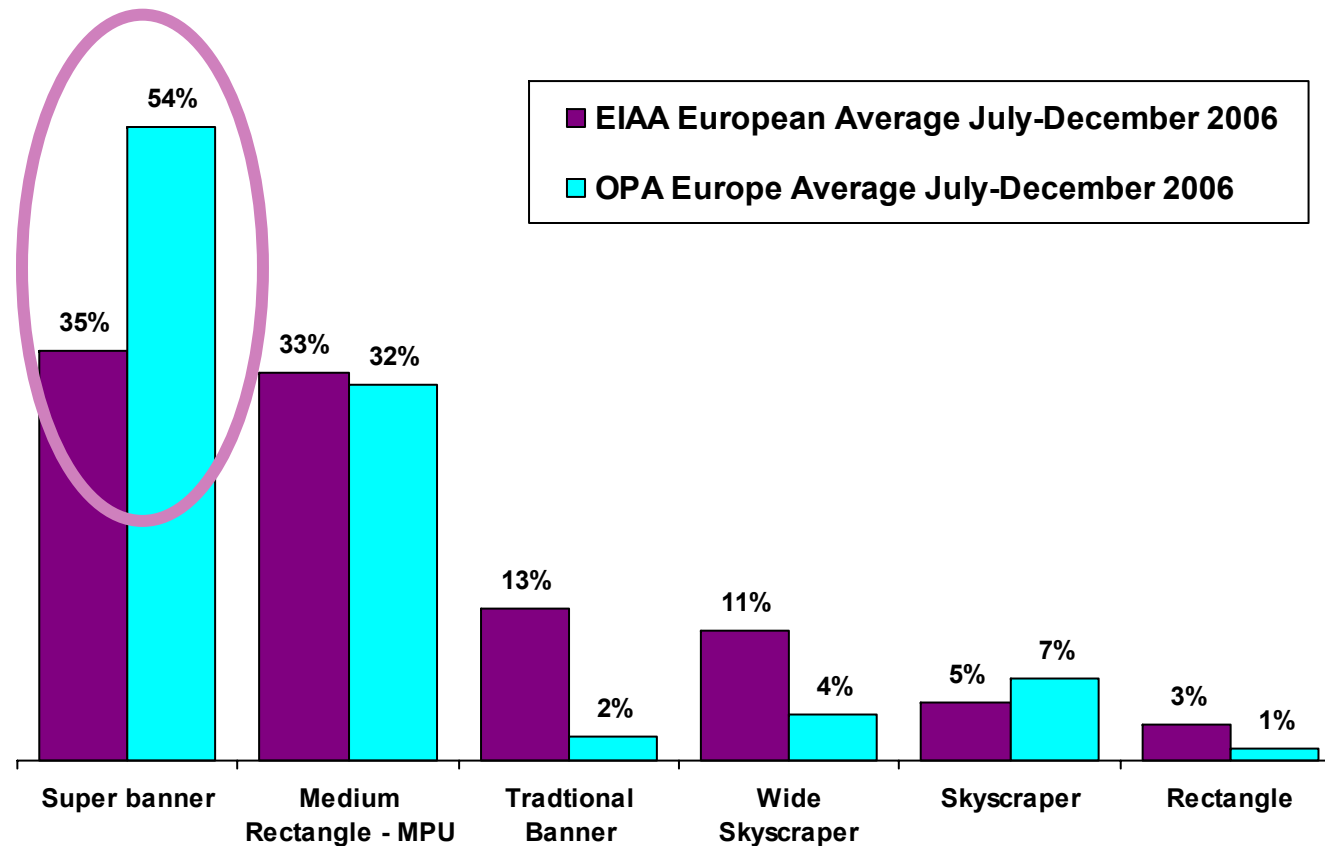
Usage of the Super Banner and the Medium Rectangle - MPU is increasing across EIAA members' networks



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The OPA Europe figures demonstrate an even greater concentration on the bolder formats



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5. Usage of formats across different countries analysed on EIAA members' sites

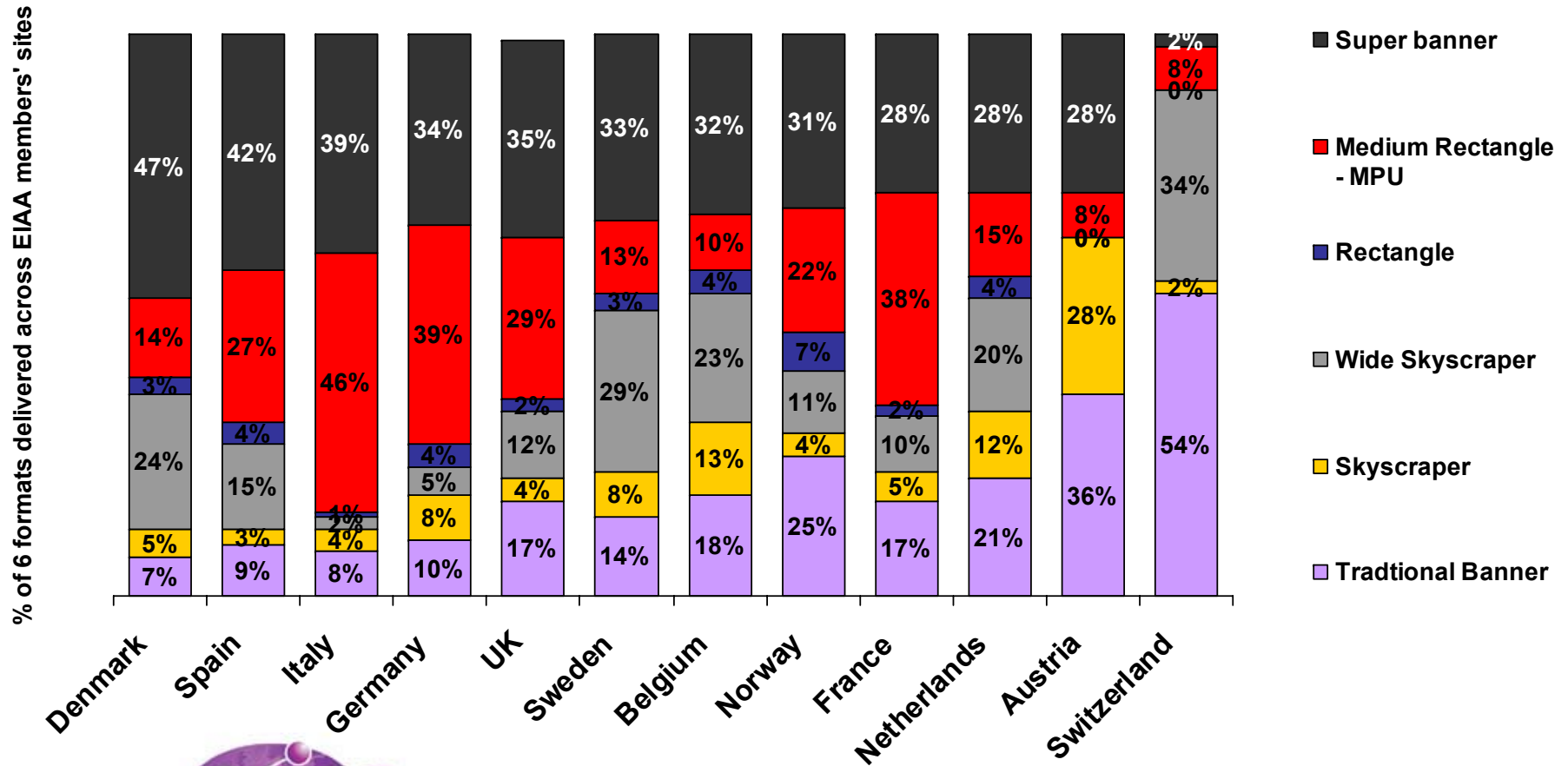
- The UK, Spanish, Dutch and Nordic markets are predominantly using the Super Banner
 - The UK in particular has seen a significant growth in the use of the Super Banner since Jan-December 2006
- In Italy, Germany and France the Medium Rectangle – MPU is the most favoured ad format
- The German, French and Italian regions have seen the biggest boost in MPU
 - Germany has seen a phenomenal pull towards the Medium Rectangle with a 225% growth rate since the first six months of the year



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The Super Banner is very popular across EIAA members' sites in Denmark and Spain...

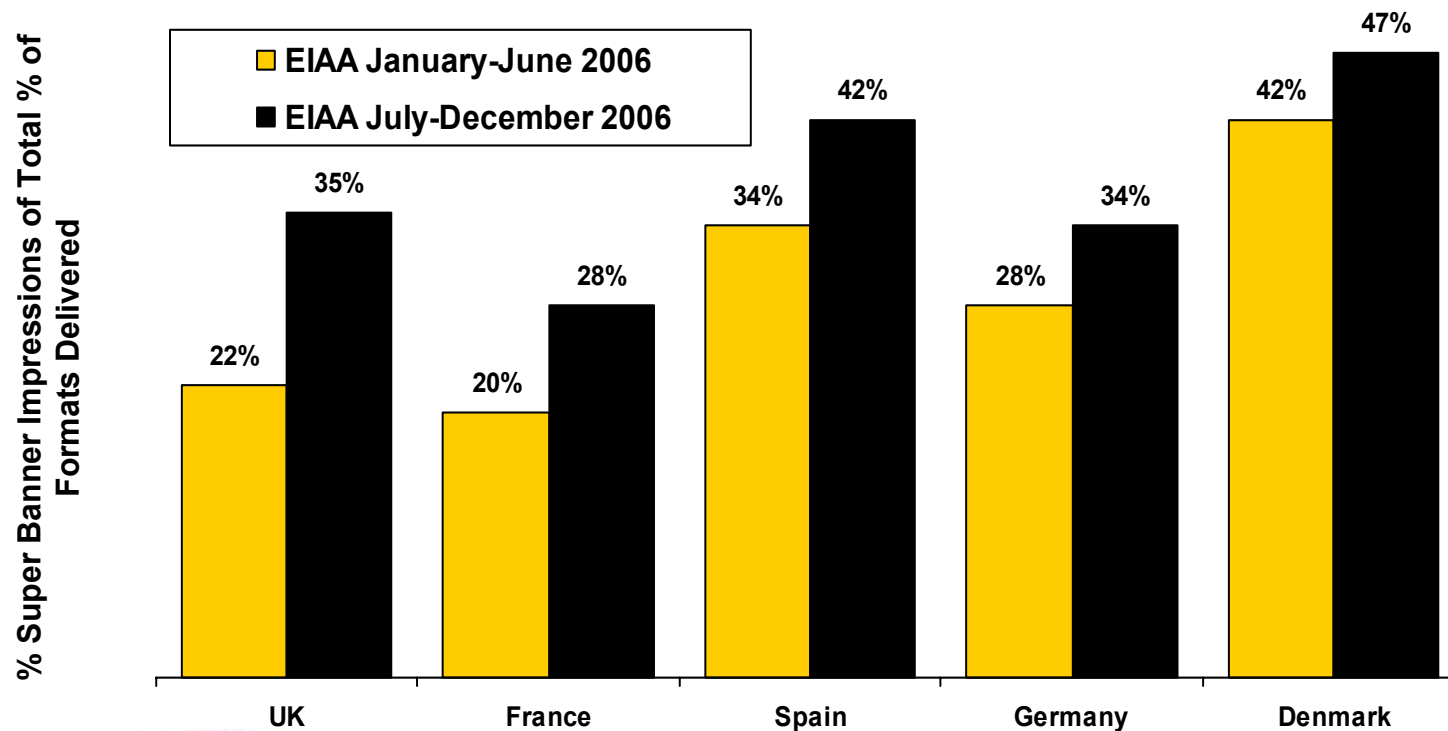


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...The UK in particular has seen a dramatic growth in the use of the Super Banner

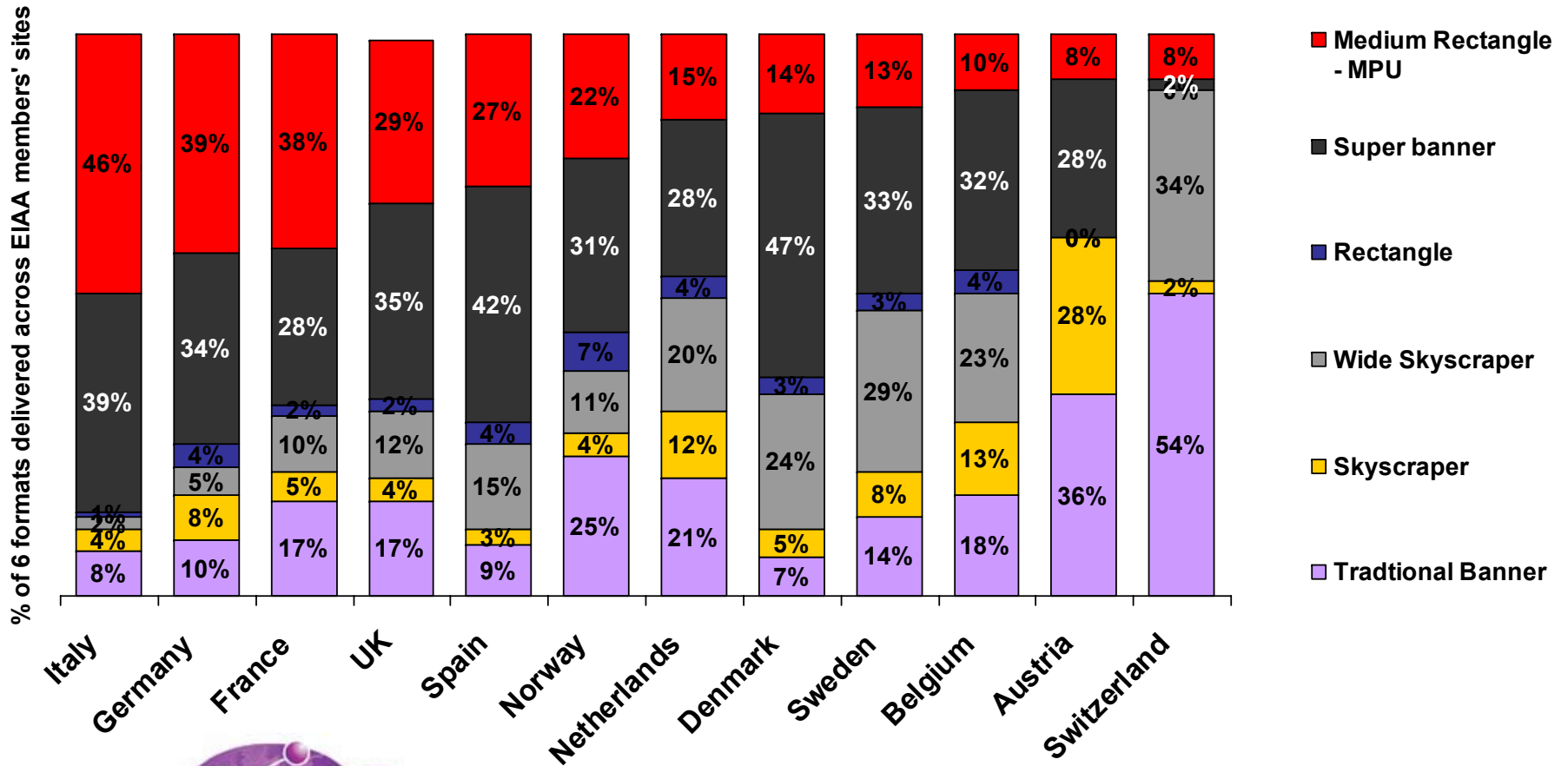
Top 5 Countries that have seen an increase in the use of the Super Banner



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In Italy, Germany and France the Medium Rectangle – MPU is the most favoured ad format across EIAA members' sites...



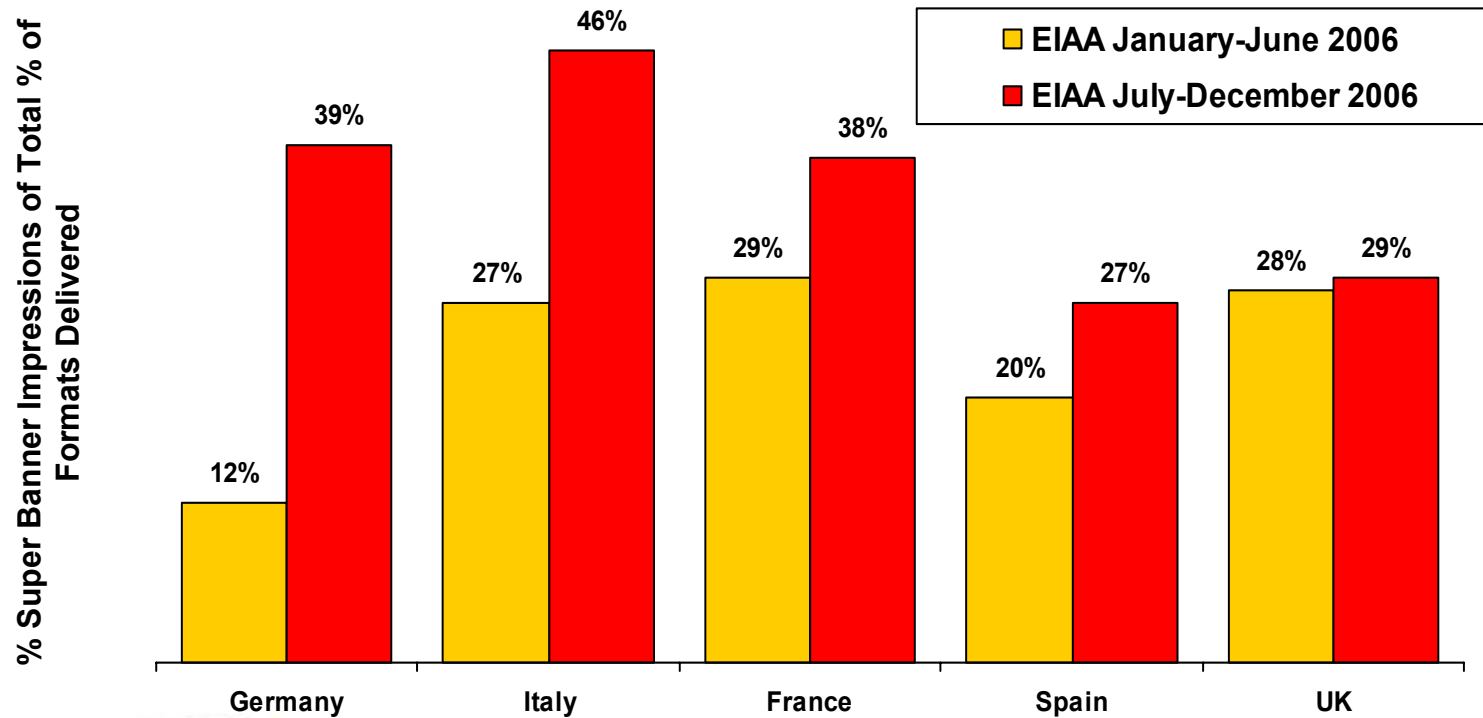
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online publishers association

...The Medium Rectangle – MPU has seen significant growth in Germany

Top 5 Countries that have seen an increase in the use of the Medium Rectangle - MPU



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6. Conclusions

- Advertisers are embracing 'entertaining' online ad formats as a way to interact and engage with their consumers and communicate brand messages
- Rich media advertisements with their increased capabilities for creativity and interactivity, in particular for streaming video, are grabbing the attention of advertisers and consumers alike.
- Advertisers have responded to the opportunity to deliver greater impact and creativity to consumers through these formats across the OPA Europe members' news and information sites.
- Media owners are responding to the demand for these larger size creatives
- More impactful and interactive consumer advertising improves the user experience and retention whilst the increased flexibility and creativity these formats deliver mean that advertisers benefit from greater 'visual take-out' of the execution and better brand recall.



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