

EIAA Mediascope Europe 2007

Executive Summary

Mediascope Europe 2007

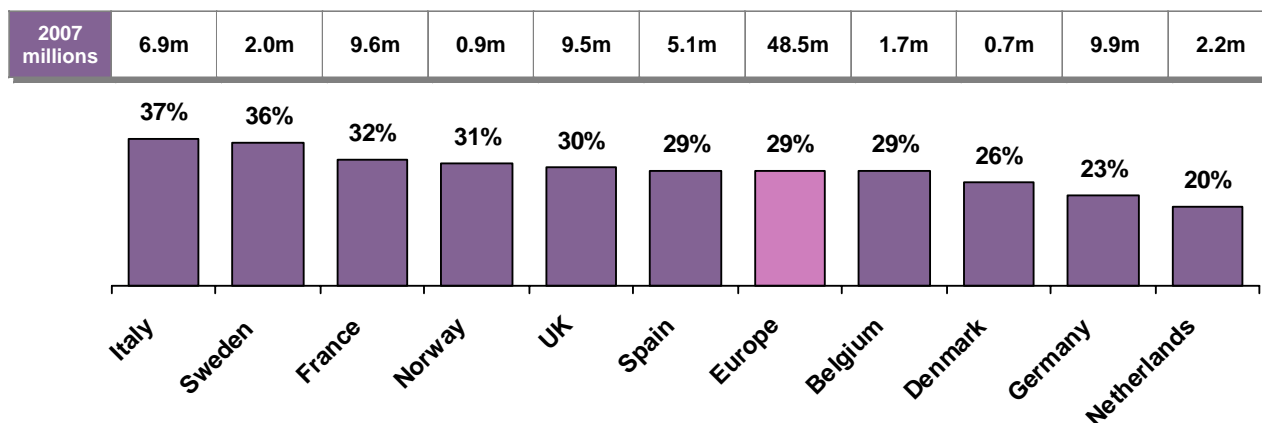
Now in its fifth consecutive year, Mediascope Europe 2007 provides a unique insight into the evolution of TV, Internet, Radio, Newspaper and Magazine consumption across Europe, and the role the Internet plays in people's lives.

Summary

WEEKLY INTERNET USE AND TIME SPENT ONLINE

- 169 million people now online across 10 European markets
- Uplift in online driven by rising use amongst silver surfers and digital women
 - Since 2006, there has been a 12% rise in the number of 55+ year olds using the internet each week and an 8% increase amongst women
- Internet users on average spending nearly 12 hours per week online
- Nearly a third (29%) of all internet users spend upwards of 16 hours online – representing more than 48 million people:

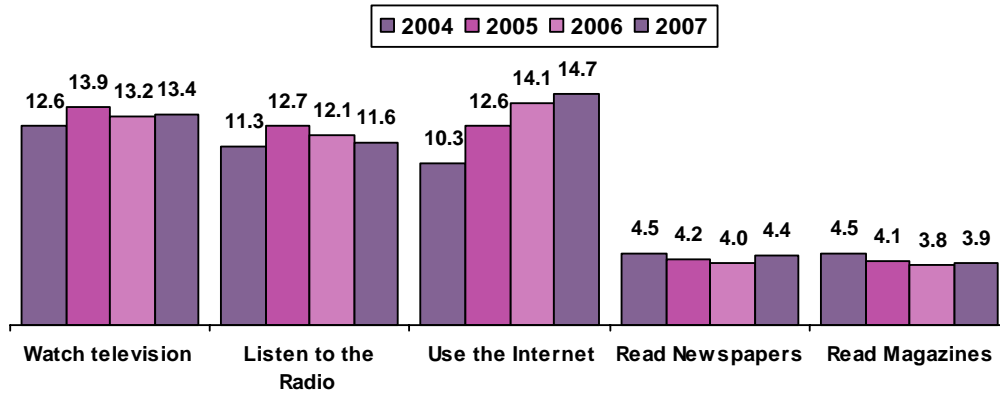
Heavy Internet users (%) - 2007



[Base: All Europe internet users (n=4017)]

- 16-24 year olds spend 10% more time surfing the internet than sat in front of the television:

Hours spent using each media in a typical week – 16-24 year olds

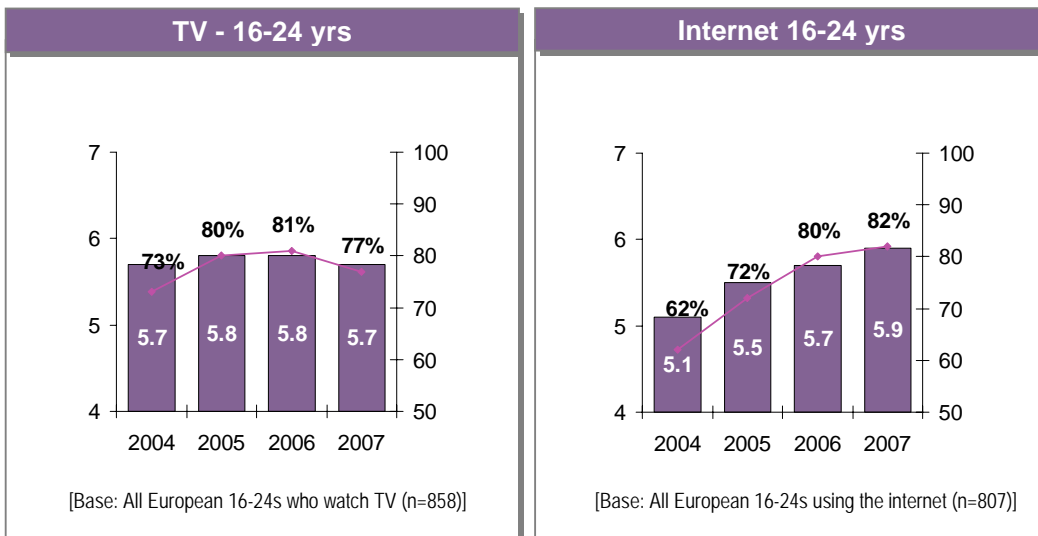


[Base: All European 16-24s using each media]

FREQUENCY OF INTERNET USE

- For the first time ever, 16-24 year olds across Europe are now accessing the internet more frequently than they are watching TV
 - 82% of this younger demographic use the internet between 5 and 7 days each week while only 77% watch TV as regularly (a decrease of 5% since last year):

Number of days per week and % using each media between 5 and 7 days per week

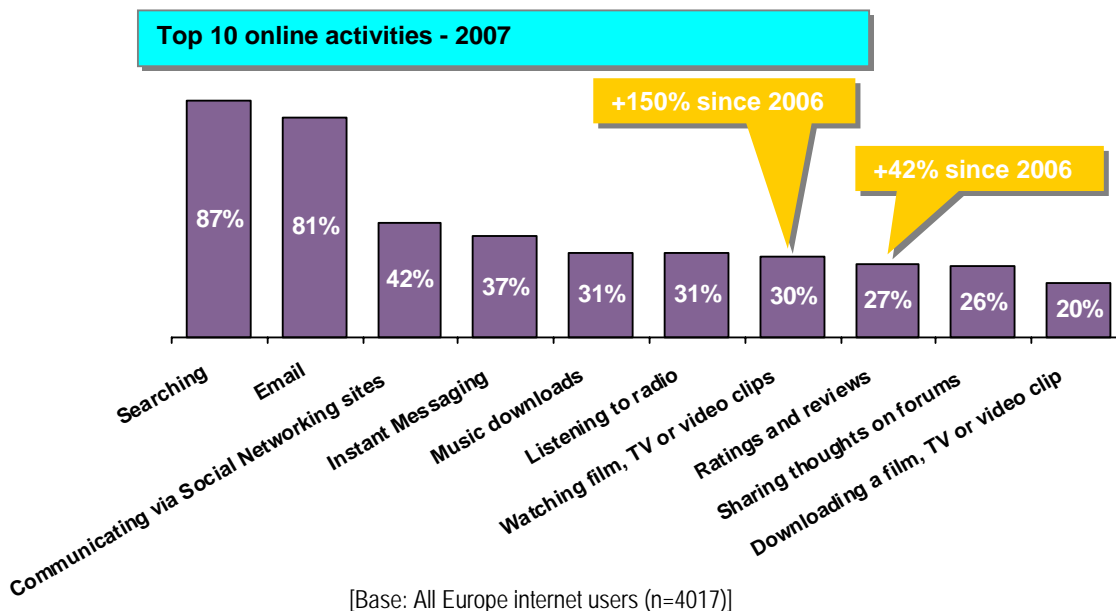


- European internet users access the internet 5.5 days per week

- Internet consumption is in fact still hot on the heels of TV consumption amongst all demographics across Europe
 - Three quarters (75%) of all internet users go online between 5 and 7 days per week, an increase from 61% in 2004
 - The number of Europeans that watch TV has remained stable at 86% for the last three years.

BROADBAND PENETRATION AND ONLINE ACTIVITIES

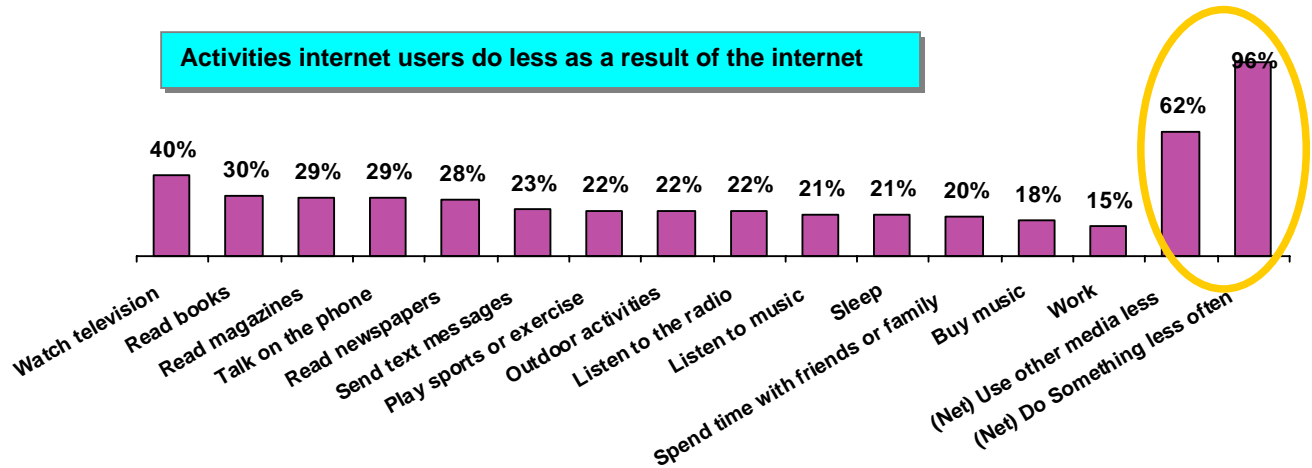
- 8 out of 10 (81%) of all internet users now use a broadband connection
- 42% of internet users now communicate via social networking sites at least once a month, putting it in third place (behind only search and email) in terms of most popular online activities:



- The number of people watching TV, film or video clips online at least once a month has grown a massive 150% since 2006
- European internet users also enjoy sharing information online:
 - The number of people contributing to rating and review sites has seen a growth of 42% since 2006
 - Over a quarter (26%) now share their thoughts on forums
- 83% of respondents stated that they can't live without at least one activity on the internet
- Only a small number of users (less than 10%) felt that online activities were too complicated

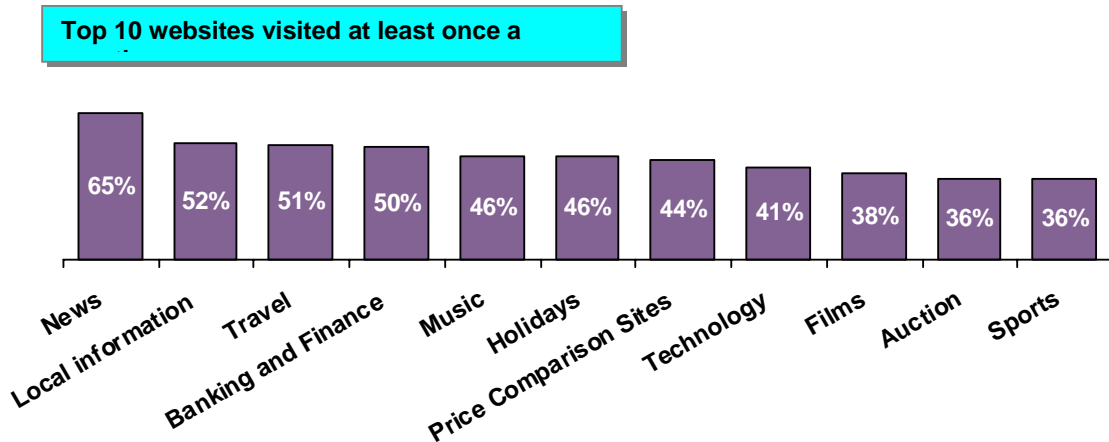
THE IMPACT OF THE INTERNET AND WEBSITES VISITED

- 96% of internet users admit to doing something less often as a result of the internet
- Almost two thirds (62%) use other forms of media less in favour of the internet:
 - 40% admit to watching less TV
 - 22% do not listen to as much radio
 - 28% read newspapers less frequently



[Base: All Europe internet users (n=4017)]

- Nearly half (48%) of all 16-24 year old internet users claim their TV consumption has dropped off as a direct result of the internet
- 65% of internet users access news sites at least once a month, making news the most popular type of website visited – closely followed by local information (52%), travel (51%) and banking and finance (50%):



[Base: All Europe internet users (n=4017)]

KEY MESSAGES

- There is huge potential to engage and interact with a rapidly growing online audience if marketers can fully understand *how* consumers are spending their time online. For example, internet users are spending much more time interacting with content and new online tools and services: 42% of internet users regularly communicate via social networking sites and 30% of people watching TV, film or video clips online.
- 16-24 year olds are living the digital world of the future; they spend more time online than they do watching TV and are in complete control of their media consumption. Marketers need to focus on finding the right balance of display advertising, word of mouth and viral marketing in order to effectively engage and communicate with this key target audience.
- Marketers need to be aware of how powerful social recommendation on the internet can be. As a result of the increased levels of online interaction, Europeans continue to embrace new online 'social media' applications and technologies. 42% of internet users now regularly communicate via social networking sites and the number of people contributing to rating and review sites has seen a growth of 42% since 2006 and over a quarter (26%) now share their thoughts on forums, highlighting the potential power of word of mouth marketing.
- Opportunities to create rich media TV and video-style adverts are increasing as European broadband penetration grows. 81% of European internet users now connect to the internet via a broadband connection and as a result, internet users are able to enjoy a more interactive and engaging online experience.
- Marketers need to understand that in order to engage and interact with consumers online, the environment, consumer proposition and advertising need to be relevant and effectively planned in order to reach and resonate with their key audience

METHODOLOGY

The **EIAA Mediascope Europe 2007** study, which was managed by SPA and conducted by Synovate, involved 7,008 random telephone interviews with over 1,000 respondents in the UK, Germany, France, Spain, Italy and the Nordics respectively and 500 respondents in Belgium and the Netherlands respectively. Interviews were conducted throughout September 2007.

For more information please go to www.eiaa.net or email info@eiaa.net

If you are an agency or advertiser requiring a more detailed presentation of this data please contact afennah@eiaa.net

ABOUT THE EIAA

The European Interactive Advertising Association (www.eiaa.net) is a unique pan-European trade organisation for sellers of interactive media. The primary objectives of the EIAA are to champion and to improve the understanding of the value of online advertising as a medium, to grow the European interactive advertising market by proving its effectiveness, thus increasing its share of total advertising investment. Its members are currently AD Europe, AdLINK Group, AOL Europe, Microsoft Digital Advertising Solutions, Tiscali, Yahoo! Europe, LYCOS Network Europe, Atlas & DRIVEpm, Doubleclick, wunderloop and MTV Networks Europe. It is chaired by Michael Kleindl, Managing Partner of Valkiria Network. The EIAA members' networks account for 79% of the European online audience.