

EIAA Sport and the Shift to Interactive Media 2008

Executive Summary

Sport and the Shift to Interactive Media 2008

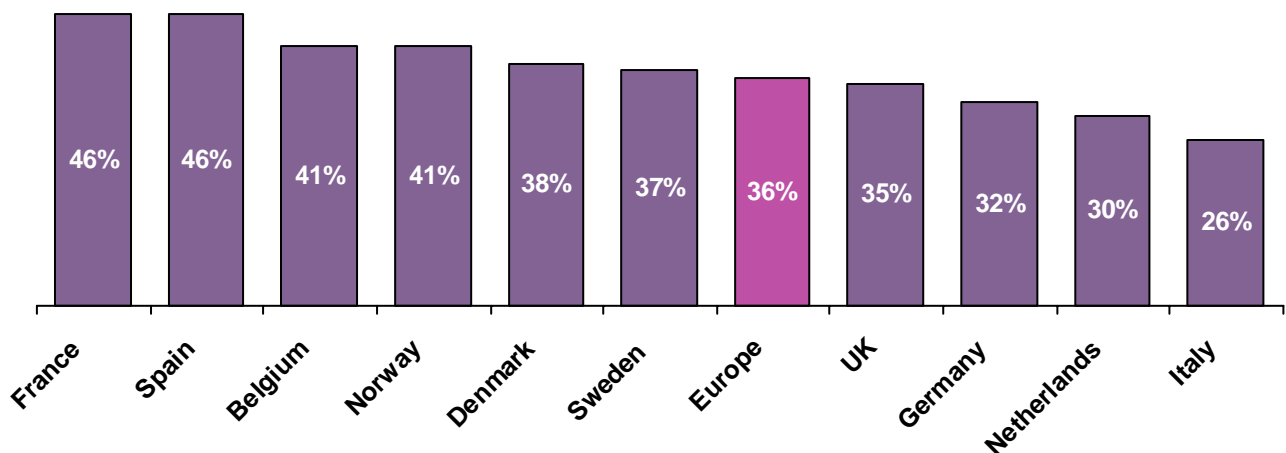
The EIAA Sport and the Shift to Interactive Media 2008 report forms part of the ongoing Mediascope Europe Study. Now in its fifth year, Mediascope Europe is one of the most comprehensive pieces of research available looking at how people consume media and how they use the internet for content, communication and commerce.

Summary

SPORT SITE USERS & MEDIA CONVERGENCE

- Sporting events happening this summer such as the Olympics and Euro 2008 can act as catalysts for a change in media consumption as fans adopt new habits and technology in order to follow their favourite sports.
- EIAA research shows that twice as many sports fans use the internet whilst watching TV compared with the average user (32% vs. 16%)
- Over a third (36%) of all European internet users currently visit sports websites:

Sport users by country

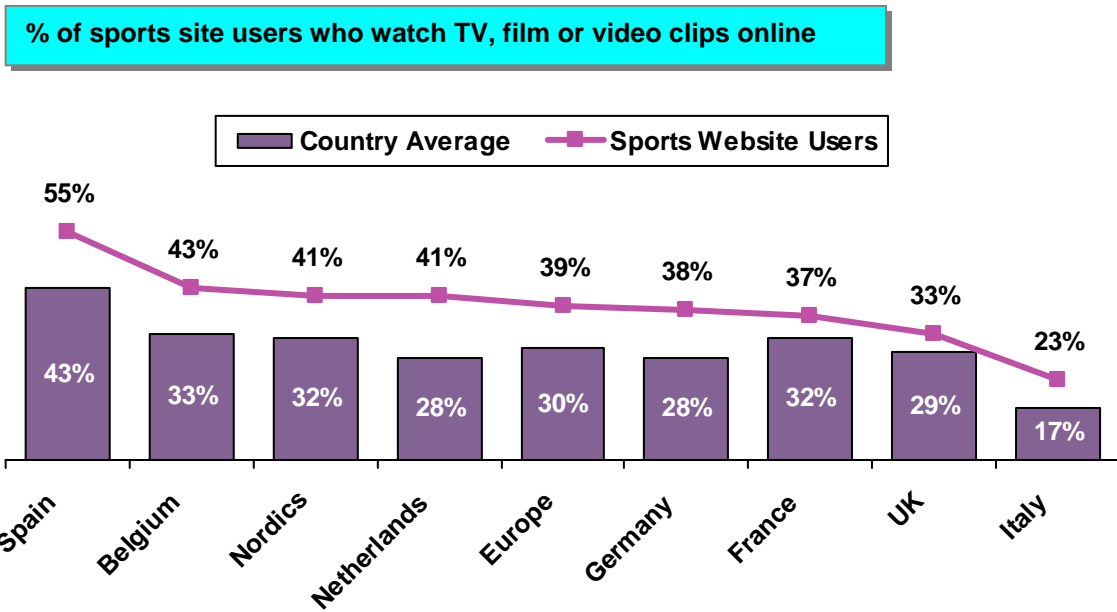


[Base: Sports Website Users (n=1548)]

- Sports site users spend over 13 hours online each week, 10% more time than the average European and an increase of 27% since 2004

'PLAY' ON

- Nearly 40% of sports site users watch TV, film or video clips online, much more so than the average European internet user (39% vs. 30%) – this activity has also grown in popularity amongst sports site users by 144% since 2006:



[Base: Sports Website Users (n=1548) and all internet users (4166)]

- ComScore figures also show that from January to December 2007, time spent on sites with video streaming and downloads has increased by 72%, from 53 to 91 minutes
- In March 2008 alone, nearly 154 million people visited these sites, an increase of 22% when compared to the same month in 2007.

SPORTS SITE INSIGHT

- According to comScore, from January to December 2007 an average of 76 million Europeans visited sports sites each month - and further analysis of sports sites shows that visitors significantly peak during the big sporting spectacles –
 - The number of European sport site users increased by around 5 million in September and October 2007 when the Rugby World Cup was on

- When the Six Nations Rugby tournament took place in March this year, European sports site users rocketed to 84.7 million (up from 77.4 million in February).

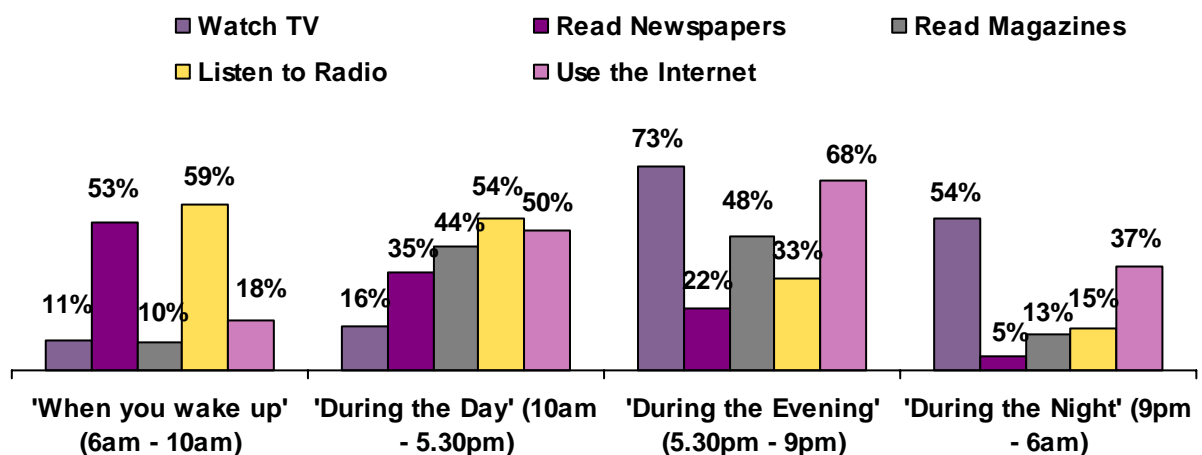
Month	Total Unique Users (000)	Average minutes per user
January 2007	71,870	52
February 2007	72,130	50
March 2007	79,941	52
April 2007	75,678	53
May 2007	77,641	50
June 2007	73,884	50
July 2007	73,676	52
August 2007	75,416	55
September 2007	80,405	56
October 2007	80,955	54
November 2007	76,857	52
December 2007	76,913	49
January 2008	77,575	57
February 2008	77,396	49
March 2008	84,666	50

Source: comScore Media Metrix

*Unique Visitors aged 15+, excludes traffic from public computers such as internet cafes or access from mobile phones or PDAs

- EIAA research shows that from 5.30-9pm 73% of sports site users watch television and 68% use the internet, making them by far the most used media during this peak consumption time

Media consumption by day part – sports site users



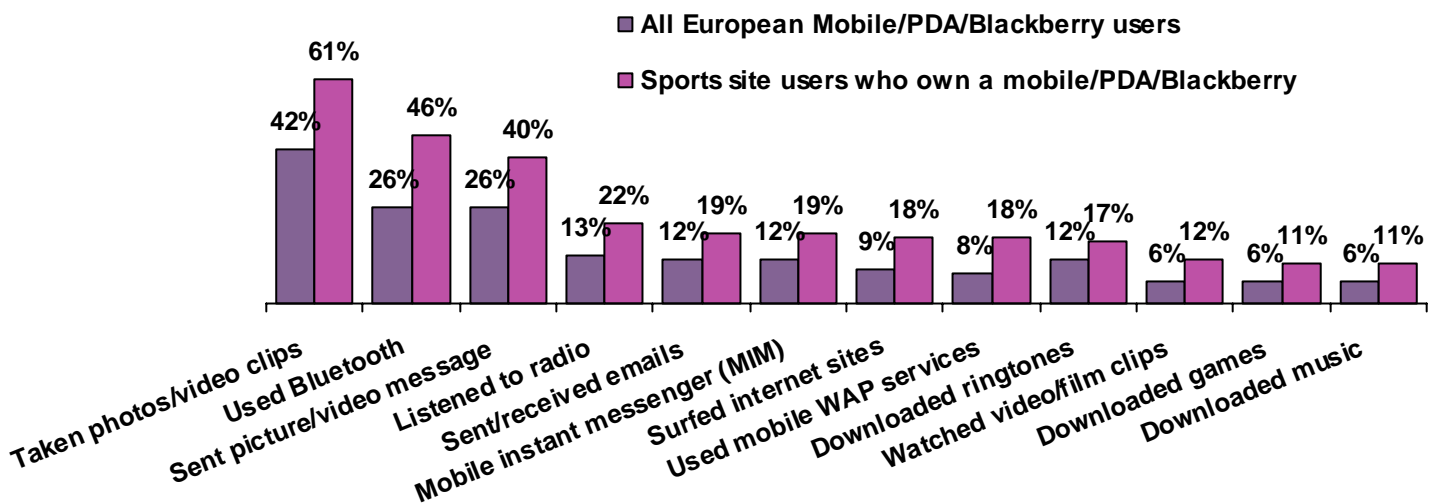
[Base: All Sports Website Users using each type of media (TV=1424, newspapers=1207, magazines=852, radio=1284, internet=1512)]

- The internet is also proving a medium for round-the-clock consumption and with 87% of sports site users having broadband, global events such as the Olympics in China this year, present additional high-impact opportunities for marketers to target this audience as they look to follow the action in real-time online.

SPORTING LIFESTYLES

- 93% of sports site users own a mobile/PDA/Blackberry (vs. 83% of all Europeans) and are heavy users of mobile internet –
 - They are twice as likely as the average European mobile/PDA/Blackberry user to watch video/film clips via their mobile (12% vs. 6%) and are more likely to perform other online activities on their mobile

Mobile activities undertaken



[Base: All Europe with a mobile phone or Blackberry/PDA (n=5911) and all sports site users with a mobile phone or Blackberry/PDA (1451)]

- Almost half (48%) of all sports site users communicate via social networking sites
- Nine out of ten sports site users (91%) own a DVD player (compared to 75% of all Europeans) and 86% have a PC in their home (vs. 64%)
- 57% rated internet advertising high on creativity thus marking the demographic to be a more engaged and receptive group compared to the average European internet user (51%)
- Almost three-quarters (71%) of sports site users find that the internet provides them with what they want quickly

KEY FINDINGS

- Digital media is fast becoming the medium of choice for sports fans and pushing the boundaries of media convergence across TV, internet and mobile – we can see this in the increasing simultaneous use and crossover between media:
 - 32% of sports fans use TV and internet together compared with 16% of all users
 - 73% of sports fans watch television and 68% use the internet during the peak media consumption period (5.30-9pm)
 - 39% of sports site users watch TV, film or video clips online and they are twice as likely as the average mobile/PDA/Blackberry user to watch video/film clips via their mobile (12% vs. 6%).
- Over a third (36%) of all European internet users currently visit sports sites
- Sports site users spend over 13 hours online each week, 10% more time than the average European spends online and an increase of 27% since 2004
- Brands need to work out how best to reach and interact with this sports-driven audience as it develops and it is vital that marketers create strategies to take advantage of the media opportunities surrounding key sporting events.

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. Since its founding in 2002 the EIAA has invested substantially in multimedia research, marketing, standardisation activities and education, of both the market and government, on the role of interactive advertising. With this wide-ranging programme the EIAA has grown quickly to command a solid reputation and influential position within the European online market.

EIAA members are currently AD Europe (Orange, United Internet Media, Libero), AdLINK Group, AOL Europe, Microsoft Advertising, Yahoo! Europe, Atlas & DRIVEpm, eBay International Advertising, LYCOS Network Europe, blinkx, DoubleClick, MTV Networks International, PREMIUM PUBLISHERS ONLINE, Tiscali and wunderloop. The EIAA is chaired by Michael Kleindl, Managing Partner of Valkiria Network.

With these member networks reaching the majority of the European online audience, the EIAA is in a unique position to work with advertisers and agencies to realise the full potential of interactive media in any marketing strategy.