

EIAA Mediascope Europe

Executive Summary

The **Mediascope Europe Study** from the European Interactive Advertising Association is one of the most comprehensive pieces of research available looking at how people allocate their time across media in Europe and how consumers use the internet. The research was conducted for the European Interactive Advertising Association by SPA and Synovate.

Methodology

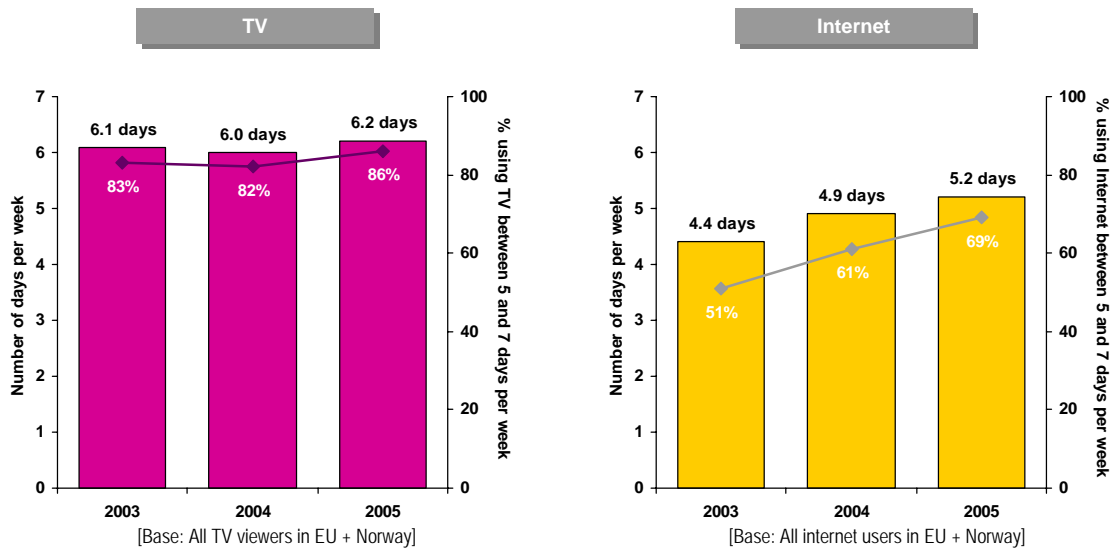
- 7,016 Computer Aided Telephone Interviews (CATi) were conducted in 9 EU countries and Norway
- The application of quotas ensured that representative samples were achieved in each country with quotas on age, gender, income level, education and regional distribution
- Results at the total level were weighted to take into account the different country's population sizes.
- Fieldwork took place in all territories between 1st-28th September 2005
- Interviews length ranged from between 25-30 minutes
- The research is now in its third year, first conducted in September 2003

Summary

PAN EUROPEAN VIEW OF MEDIA CONSUMPTION

- Internet use growing faster than other media with the number of internet users going online 5 or more days per week increasing from 51% to 69%.
- European consumers are spending increasing amounts of time online with the average European internet user now spending over 10 hours online each week
 - Increasing to 13 hours for 16-24s
- Internet is the second most dominant medium in media mix from 10am
- Young Europeans are driving internet usage forward with more than three quarters of 16-24 year olds going online in a typical week.

For example, at pan-European level, this chart shows the increase in frequency of Internet Usage vs TV



MEDIA CROSSOVER

- The level of media-meshing, i.e. using more than one media at a time, amongst Europeans is set to grow, but consumers are more focused while online compared with other media

PAN EUROPEAN WEBSITE USAGE AND WEB ACTIVITIES

- Europeans surf a wide variety of websites – from e-commerce to local information to online gaming
- Europe is embracing new internet activities - 1 in 10 regularly contribute to on-line blogs, podcast and make telephone calls via VOIP – and internet users are becoming more sophisticated
- There are high levels of internet usage in France, with all countries showing a significant increase through 2003 and 2004

ATTITUDES TO ONLINE ADVERTISING

- Internet advertising performs well above print and radio with significantly more Europeans considering it creative, brand enhancing and cutting edge

IMPLICATIONS FOR MARKETERS

Advertisers and their agencies need to find and understand their audiences. What this research indicates is that people are spending an increasing amount of their media time online and becoming more sophisticated. Marketers need to take advantage of the opportunity offered by online to interact with their consumers on a much deeper level.

For more information please go to www.eiaa.net or email enquiries@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 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 Internet Media AG, AOL Europe, MSN International, Tiscali, Yahoo! Europe, LYCOS Europe and T-Online International.