

SHIFTING TRADITIONS: INTERNET RIVALING TV IN MEDIA CONSUMPTION STAKES

Key audience segments now show internet as most used media

Key European Findings

- 169 million people now online across 10 European markets
- Internet use stretches ahead of TV amongst youth audience
- Uplift in online driven by rising use amongst silver surfers and digital women
- Internet users on average spending nearly 12 hours per week online and nearly a third (29%) spending upwards of 16 hours online
- Internet users access the internet 5.5 days per week
- Social networking sites now visited by 42% of internet users
- 8 out of 10 Europeans connect to the internet via a broadband connection

London, 12th November 2007 – 57% of Europeans now regularly access the internet each week according to research announced today by the European Interactive Advertising Association (EIAA). That equates to 169 million people now frequently online across the ten European markets surveyed in the study.

For the first time ever, 16-24 year olds 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). 16-24 year olds also spend 10% more time surfing the internet than sat in front of the television and almost half (48%) claim their TV consumption has dropped off as a direct result of the internet.

The continued popularity of the internet amongst silver surfers and digital women has also been a key factor in driving the growth of online. 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.

Time spent online is also on the up. European internet users are spending a lengthy 11.9 hours online each week and nearly a third (29%) are recognised as ‘heavy’ internet users as they spend an average of 16 hours or more online each week – representing more than 48 million people.

Internet Taking On TV

While youth are putting online ahead of TV, 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. However, the number that watch TV has remained stable at 86% for the last three years.

The internet is rapidly becoming a hub for all media with internet users increasingly consuming media such as magazines, newspapers, radio and TV digitally.

Top Three for Social Networking

Social networking continues to be all the rage with 42% of internet users now communicating 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. This is accelerated by a further increase in broadband penetration – 8 out of 10 (81%) of all internet users now use a broadband connection.

Alison Fennah, Executive Director of The EIAA says, “*Our Mediascope study shows that consumers are using the internet for function and fun as their media world becomes truly digital. We hope to help advertisers and agencies to understand this evolution and develop new and innovative communication strategies.*”

European internet users also evidently enjoy sharing information online too; 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 – further evidence of just how powerful word of mouth can be on the web.

Top 10 most popular online activities across Europe

Searching	87%
Email	81%
Communicating via social networking sites	42%
Instant messaging	37%
Music downloads	31%
Listening to radio	31%
Watching TV, film or video clips	30%
Rating and reviews	27%
Sharing thoughts on forums	26%
Downloading a film, TV or video clip	20%

Can't live without it

83% of respondents stated that they can't live without at least one online activity highlighting just how integral the internet has become to daily lives. A third (32%) of internet users claimed they couldn't live without email while 96% 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, with 40% admitting to watching less TV, 22% not listening to as much radio and 28% reading newspapers less frequently – all supported by the fact 65% of internet users access news sites at least once a month.

Top websites visited at least once a month

News	65%
Local information	52%
Travel	51%
Banking and finance	50%
Music	46%
Holidays	46%
Price comparison sites	44%
Technology	41%
Films	38%
Auction	36%
Sports	36%

The EIAA Mediascope survey also asked internet users why they didn't use the internet to carry out certain tasks and the resounding reason that came across was that it was not deemed *relevant* to them. Interestingly, only a small number of users (less than 10%) felt the tasks were too complicated - yet when asked why they don't create and share content on sites such as Flickr and You Tube, 12% cited that they were not even *aware* of these types of online activities.

Michael Kleindl, Chairman of the EIAA and Managing Partner of Valkiria Network said: *"Now in its fifth year our Mediascope study demonstrates just how quickly consumers can change their habits according to the digital opportunities they are offered. The challenge for advertisers is to create campaigns appropriate for these new empowered consumers."*

With over 7,000 people across Europe interviewed, The **EIAA Mediascope Europe Study** is one of the most comprehensive pieces of research available into how people allocate their time across media in Europe and how consumers use the internet for content, communication and commerce. The research was managed by SPA and conducted by Synovate. Synovate is a member of the Aegis Group.

The study 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.

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.