



Mediascope Europe

European Consumers – Myths or Reality? Bulletin

June 2013



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Introduction

- As part of its research remit, IAB Europe conducts Mediascope Europe, widely recognised as the industry standard consumer research study on the European media landscape.
- It is a unique example of cross industry collaboration, led by IAB Europe and supported by many leading media companies, local IABs and other trade associations.
- Established in 2003, Mediascope Europe launched its 8th wave of research in 2012.
- An Omnibus + Online methodology was used across 28 countries totalling 51,700 interviews.

Background

- Mediascope Europe is a comprehensive media consumption study covering the diverse European market with over 50,000 consumer interviews.
- The broad aim of this study is to capture the different ways in which consumers are developing across Europe and assess their similarities and differences
 - Identify changing media consumption patterns
 - Evolution of media multi-tasking and emerging and evolving online media
 - Video consumption, social media and e-commerce



Coverage and Methodology

- Fieldwork took place in 28 markets in February 2012
- An Omnibus + Online methodology was used across all countries totalling 51,700 interviews
- The application of quotas ensured that representative samples were achieved in each Market
 - Quotas on age, gender, education and regional distribution were applied



About this Bulletin

Advertising professionals often still categorise the consumer according to traditional perceptions. This Bulletin reveals hidden insights about the multi-faceted media habits of consumers across Europe including video consumption, multi-tasking, attitudes to branding, e-commerce and mobile use.

The data comes from IAB Europe's Mediascope Europe 2012 study. For further information please contact:

mediascope@iab europe.eu

KEY STATS

Let's with start with some key facts about Europeans media use...



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Europeans online...

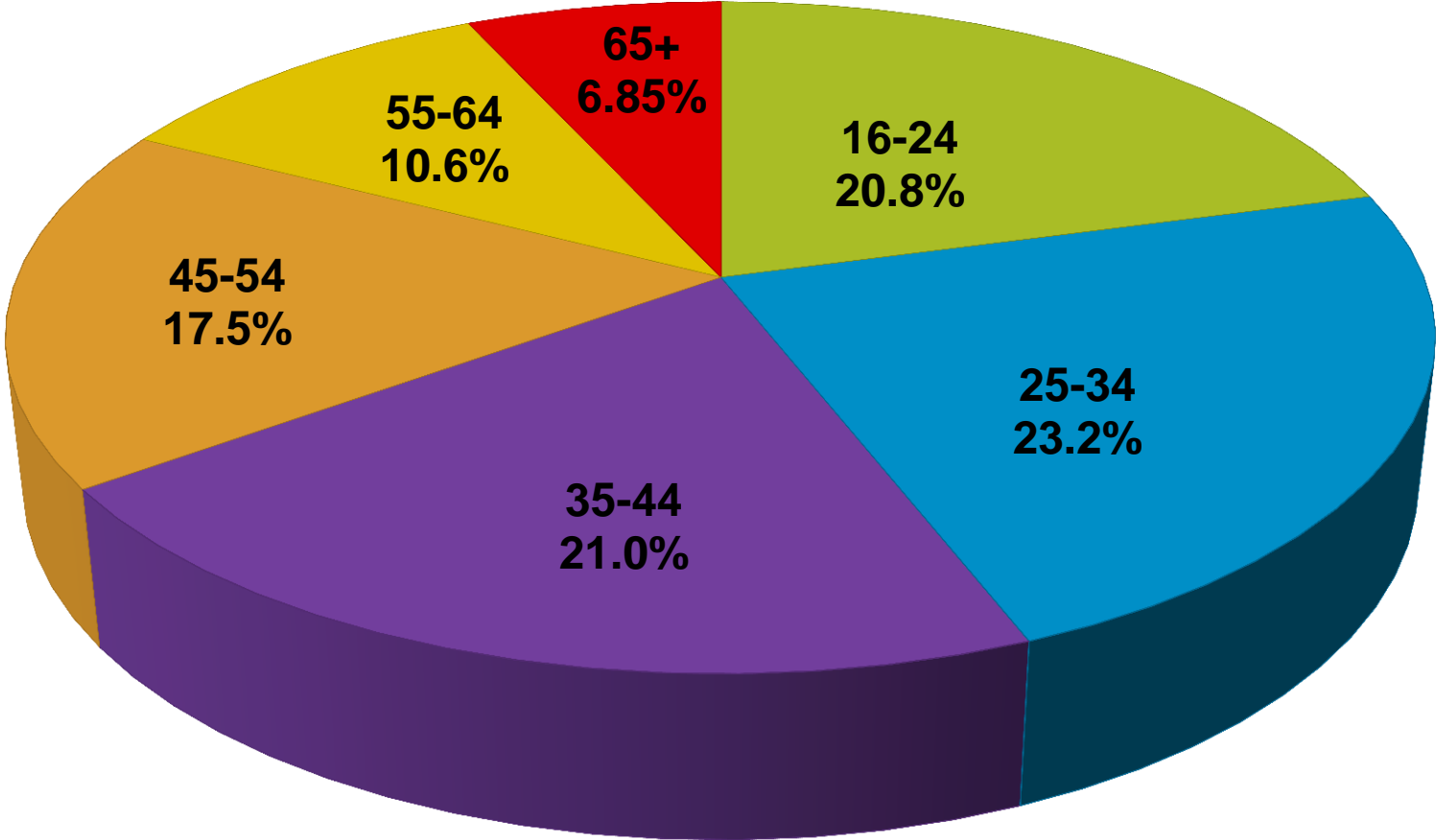
426.9m Europeans
are online

That's **65%** of the
European population

Online penetration
since 2010
has increased by **19%**



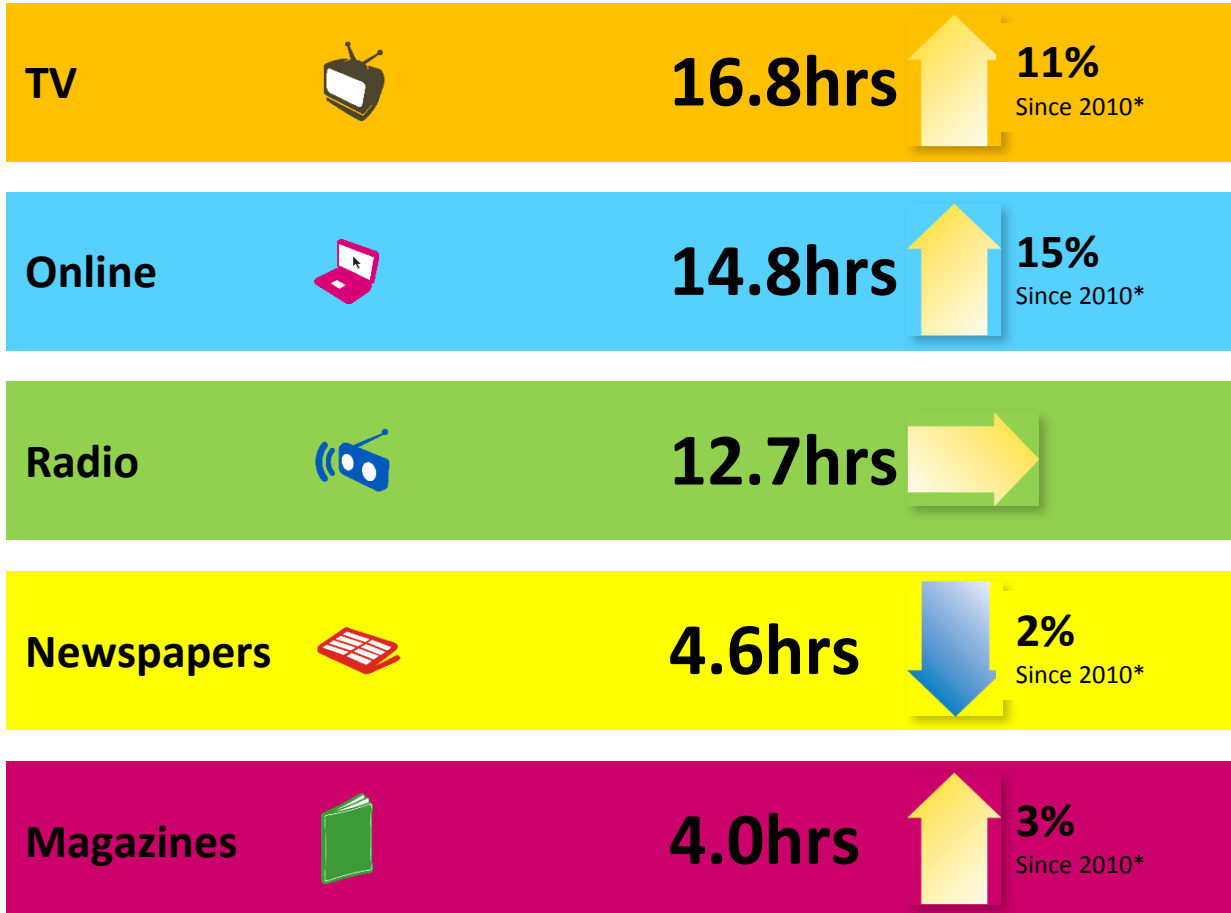
Age profile of the online European population



Gender profile of the online European population



Europeans time spent per media



TECHNOLOGY UPTAKE ACROSS EUROPE

Technology is driving the way
Europeans consume media
and interact with brands...



Ownership of internet enabled mobiles has increased by **42%** since 2010

68%

of all Europeans own a mobile phone with Internet access

44% of all Europeans own a Smartphone

6 in 10 people in the UK own a smartphone



Smartphones are used in **all** age groups


60%

of under 35s own a smartphone

20%

of over 35s own a smartphone





50.9 million Europeans use a Tablet to go online
and spend
9.3 hours a week accessing the internet on them

12%

of internet users access the internet via tablets

25%

in the UK

26%

in Norway

16%

in Switzerland

19%

in Italy



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Base: (Omnibus) All internet users (n=15,290)

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MUMS ARE TOO BUSY

Do Mums have time to engage in a broad range of digital activities?





69% of European Mums are online and spend
13.8 hours a week online

The Internet makes managing their **lifestyle** easier

61% say they are able to choose better products/services since going online

47% can manage their finances better

45% can book holidays/ make travel arrangements more easily

29% can better equip themselves for lifestyle changes

SILVER SURFERS


Are the older generation interested in the digital world?



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Silver Surfers are embracing the internet almost as much as the average European



36% of adults 55+
access the internet
and spend 10.4 hours
a week online

70% of adults aged 55+ are online during TV prime time

40% of adults 55+ go online while they watch TV

79% use email daily

37% use social networks daily

84% have made purchases online

58% of adults 55+ own an internet enabled mobile

Silver Surfers **media consumption** is moving online

77% visit news sites

34% watch TV online

31% listen to the radio online

31% watch live events online

29% listen to music online

29% watch films online

MEDIA MULTI-TASKING

Can people focus on more than one thing at a time?



Almost **half** of Europeans go online while they watch TV

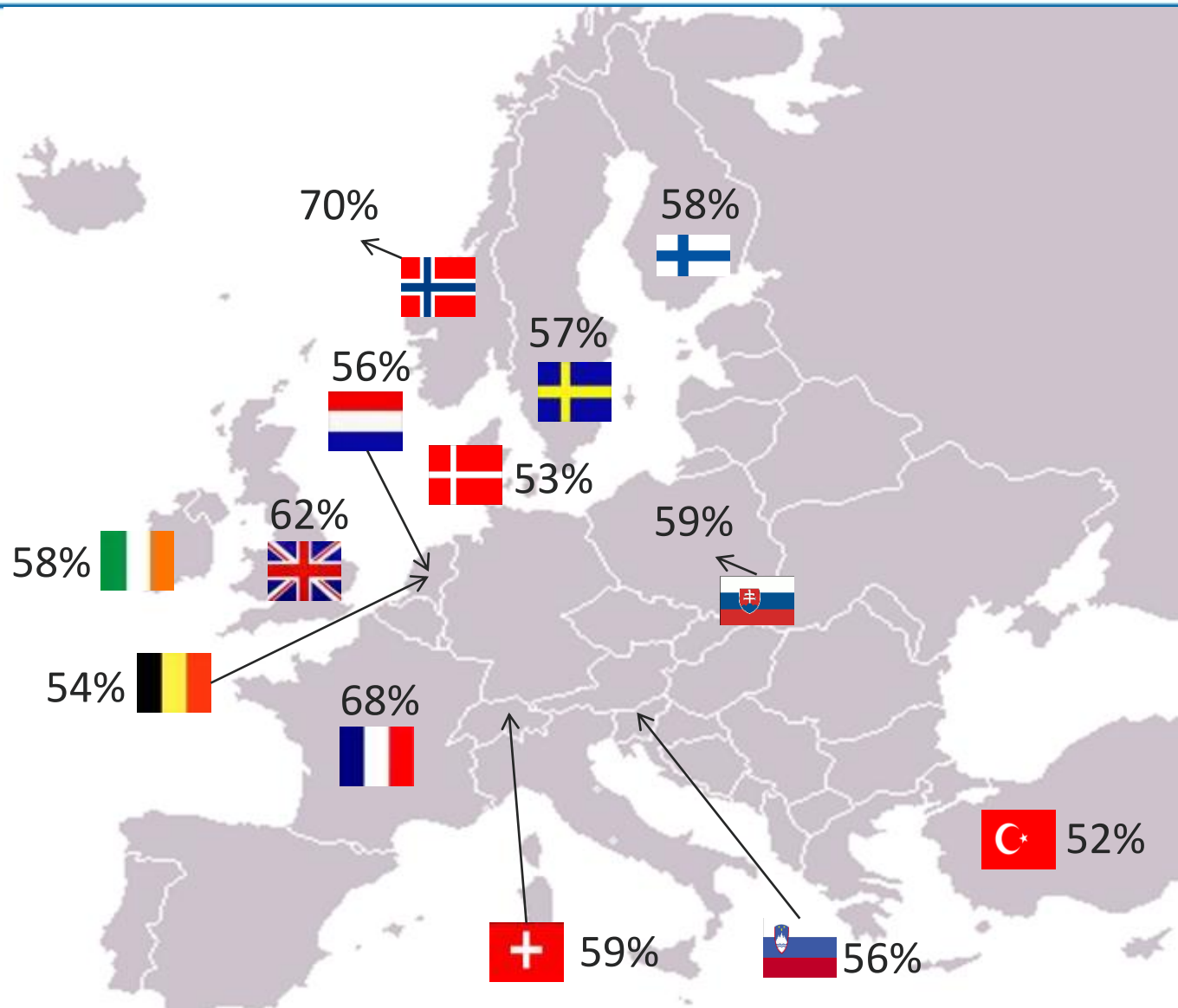
48% are online while they watch TV

11% go online via a **Mobile** while they watch TV

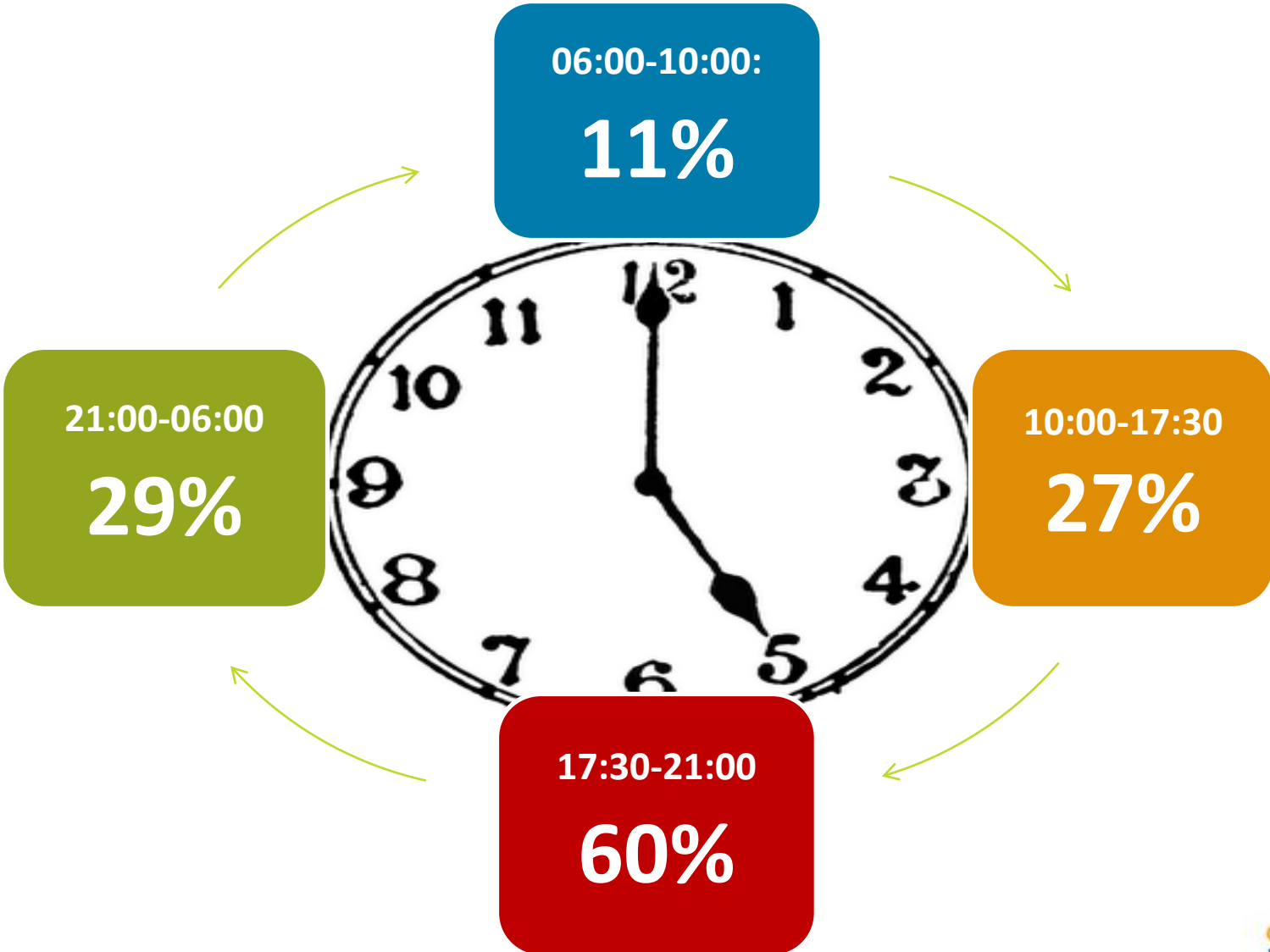
1/3 Europeans are online for a **third** of their TV viewing time



In some countries over half of their population go online while they watch TV



Media multi-tasking TV and Online is part of Europeans every day lives



THERE'S NO SUCH THING AS THE AVERAGE EUROPEAN CONSUMER

So what is Europe using the
internet for?



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To express opinions...



Greek internet users **blog** nearly **100%** more than the EU average

Dutch internet users **contribute to ratings and reviews and provide feedback on products/services** over **100%** more than the EU average

Italians are **blogging 34%** more than the average EU internet user

To express opinions...



Almost **100%** of internet users
in the **Czech Republic** use **Email**

Over 90% of **Portuguese**
internet users use **professional
social networks** which is **28%**
more than the EU average



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Base (Online): All European Internet users: (n=27,446)
All Czech Republic Internet users (n=985); All Portuguese Internet users (n=994)
Based on NET Daily/Weekly/Monthly use



For traditional media activities...

Bulgarians use the internet to make **telephone calls** (Skype / ISP) **89%** more than the average European internet user

Romanian internet users use **instant messaging** **60%** more than the average European internet user

Bulgarian internet users use personal **Social Networks** **23%** more than the average European internet user

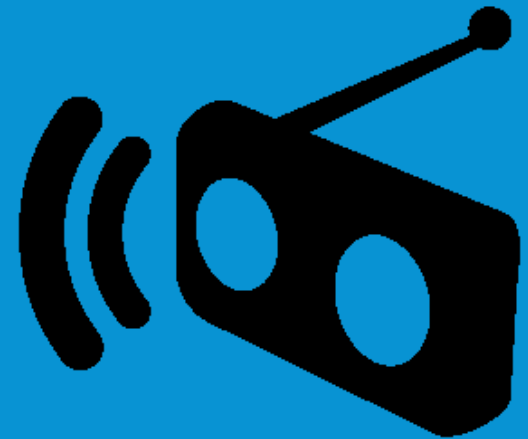


For traditional media activities...

Ukrainian internet users use **download music** over **100%** more than the average European internet user

Serbian internet users **listen to music online** **54%** more than the average European internet user

Poles listen to the **radio online** **50%** more than the average European internet user



Ukrainians spend the most time online: **20 hours per week** followed by **Romania** who spend 18.6 hours per week and **Turkey** spending 18.3 hours per week

Accessing the data

Subscribe and access
Mediascope data!

Executive Summary and
Data Presentations

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Data in planning tools – e.g.
Choices, Telmar and IMS
Clear Decisions

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