



European Interactive Advertising Association



Mediascope Europe 2010

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Zurich

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Background

- The European Interactive Advertising Association (EIAA) was formed in 2001 to act as a common, pan-European voice for the interactive advertising industry
- EIAA has made significant investment in research, particularly in the areas of media consumption, spend and advertising efficiency
- As part of this commitment to research, the EIAA has for the past six years conducted a large scale study of media consumption habits in Europe
 - enabling it to track changes in media consumption habits in order to illustrate how internet usage as a share of media consumption is changing and therefore how media planners should spend their client's ad budgets
- SPA has conducted the survey since 2005



Presentation Agenda

1. Introduction

- Research Objective
- Methodology & Sample

2. Main Findings

- Internet Use
- How Long Internet users spent Online
- How Often Internet Users are Online
- Media Meshing
- The Role of Broadband
- Consumer Use of the Internet
- Mobile Phone Use & Technology in Household
- E-commerce

Research Objectives

- The broad aim of this study is to measure and track changes in media consumption patterns by various demographic segments and nationalities
- This work will show when, why and how often people are using different media – in particular use of the Internet for content, communication and commerce
 - This year a key difference is the inclusion of internet usage via mobile devices



Methodology & sample


















- In 2010 the study was expanded to include 5 new territories – Portugal, Switzerland, Poland, Turkey and Russia

- 4,000 Computer Assisted Telephone Interviews (CATI) were conducted in 4 countries (UK, Germany, France, Spain)
- 11,000 online interviews using online panels and 8,500 interviews using an Omnibus study were conducted in Norway, Sweden, Denmark, Belgium, Netherlands, Italy, Portugal, Russia, Turkey, Switzerland and Portugal
- Fieldwork took place in all territories in November 2009
- Interview length ranged from 20-25 minutes
- The application of quotas ensured that representative samples were achieved in each country
 - quotas on age, gender, education and regional distribution



Weighting data

- Results at the total level were weighted to take into account the different countries' population sizes
- Using 2009 data from the UN, 2 weighting matrices were constructed, one comprising a figure for the original 10 countries, and one for all 15 countries
- A sample size of 10,000-12,000 provides accurate data to $\pm 1.1 - 0.8\%$ at the 95% confidence level

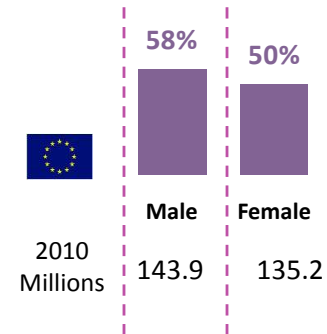
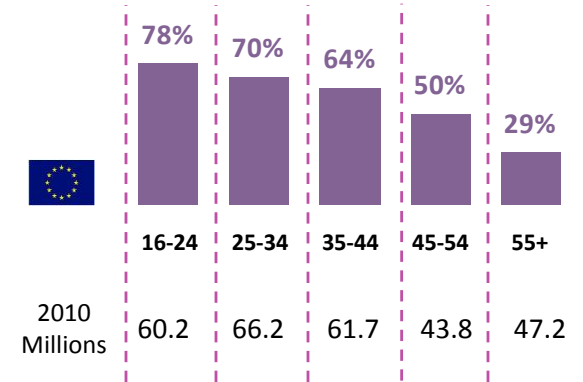
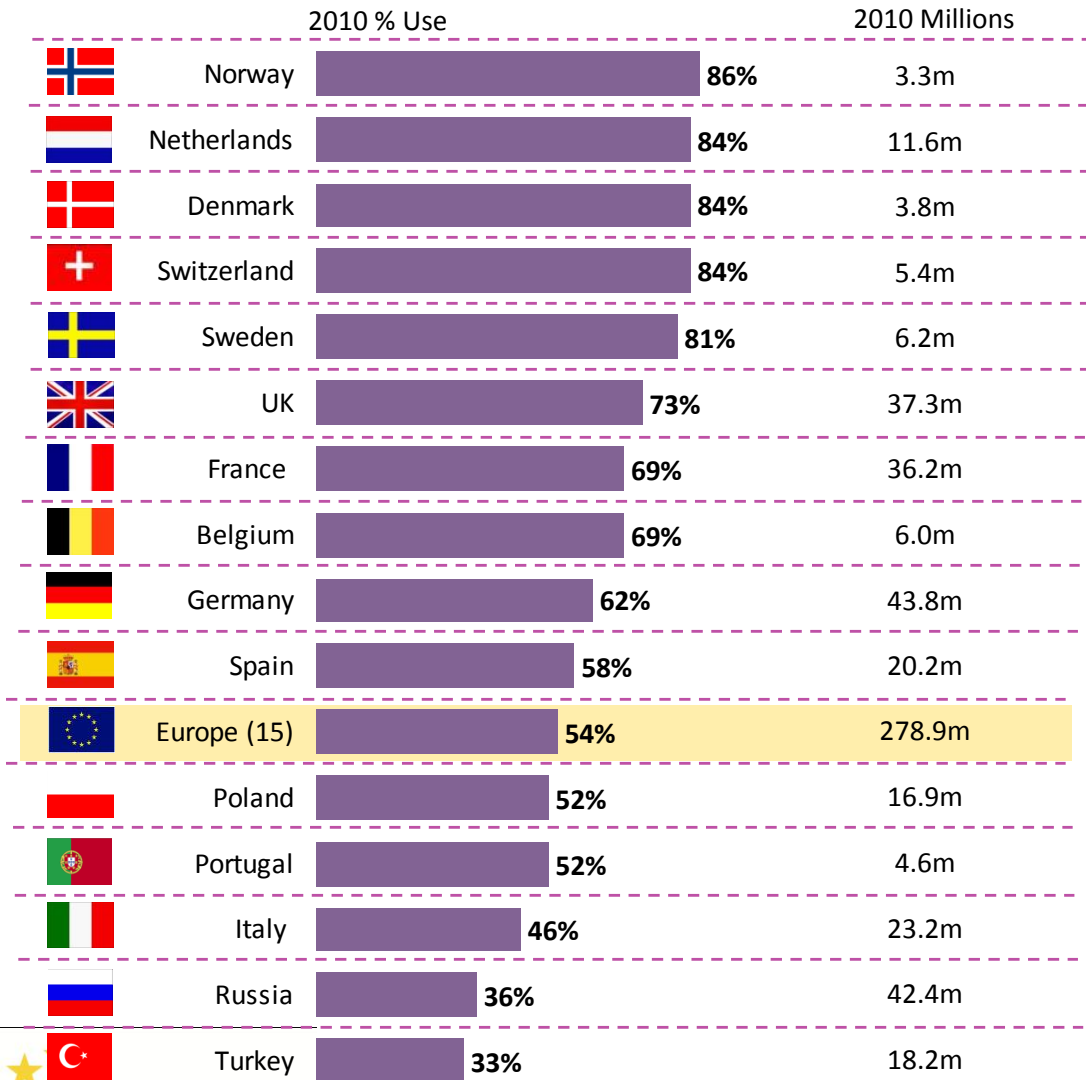
		Population (mill)	Weighting Ratio 10 country	Weighting Ratio 15 country
	Netherlands	13.8	4.6%	2.7%
	Norway	3.8	1.3%	0.7%
	Sweden	7.6	2.6%	1.5%
	Belgium	8.7	2.9%	1.7%
	Denmark	4.5	1.5%	0.9%
	UK	50.9	17.1%	9.8%
	Germany	71.1	23.9%	13.6%
	France	52.5	17.6%	10.1%
	Spain	34.7	11.6%	6.7%
	Italy	50.3	16.9%	9.6%
	Russia	119.3		22.9%
	Poland	32.7		6.3%
	Turkey	55.9		10.7%
	Portugal	9.0		1.7%
	Switzerland	6.4		1.2%
	Total EU (10)	297.9		
	Total EU (15)	521.2		

INTERNET USE



Weekly Internet use – Net PC and Mobile Switzerland ranked 4 in Europe

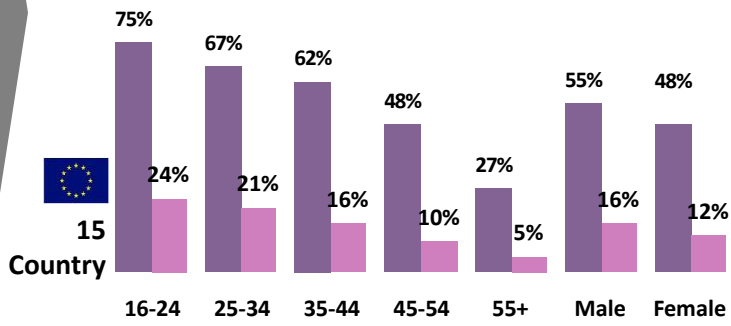
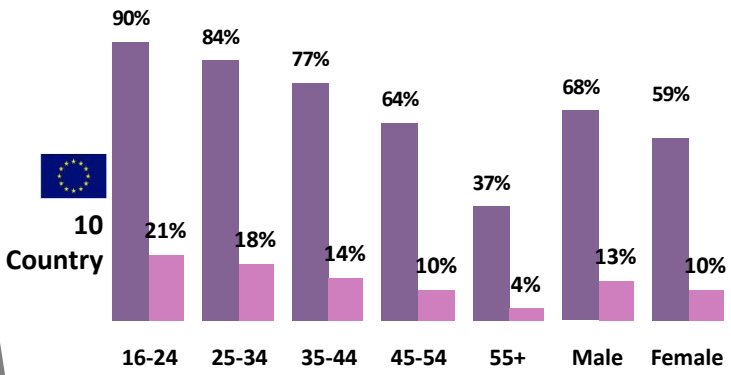
Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Use the internet via a laptop or desktop computer / Use the internet via a mobile phone or PDA device ?



Weekly Internet use – PC vs Mobile

Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Use the internet via a laptop or desktop computer / Use the internet via a mobile phone or PDA device ?

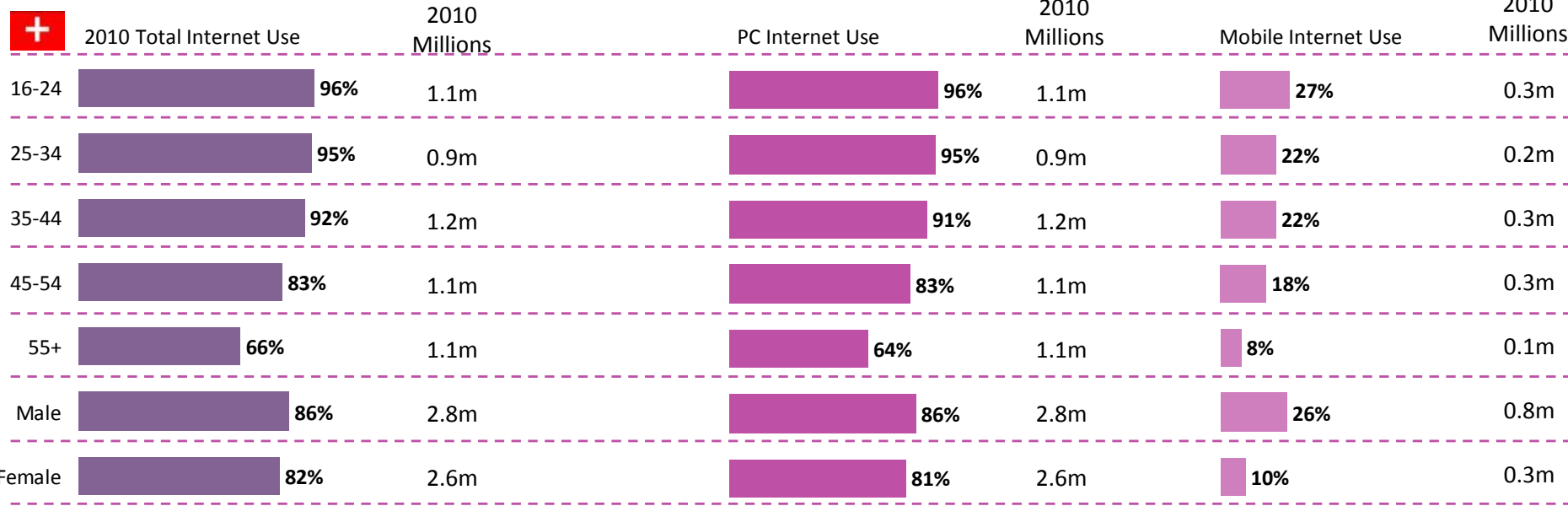
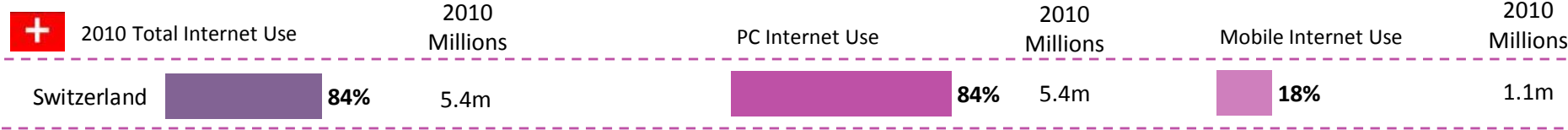
	2010 % PC Use	2010 Millions	2010 % Mobile Use	2010 Millions
Norway	84%	3.2m	14%	0.5m
Netherlands	84%	11.6m	10%	1.4m
Denmark	84%	3.8m	11%	0.5m
Switzerland	84%	5.4m	18%	1.1m
Sweden	81%	6.2m	20%	1.5m
UK	73%	37.0m	20%	10.3m
France	69%	36.0m	11%	5.5m
Belgium	68%	5.9m	16%	1.4m
Europe (10)	64%	189.7m	12%	34.4m
Germany	61%	42.5m	7%	5.0m
Spain	58%	20.1m	7%	2.3m
Europe (15)	51%	266.9m	14%	71.1m
Poland	51%	16.8m	15%	4.8m
Portugal	51%	4.6m	5%	0.5m
Italy	45%	22.5m	12%	5.8m
Russia	33%	39.8m	15%	18.2m
Turkey	20%	10.9m	21%	12.0m



[Base: All Respondents in Europe (10) (n=7540)]
 [Base: All Respondents in Europe (15) (n=12554)]

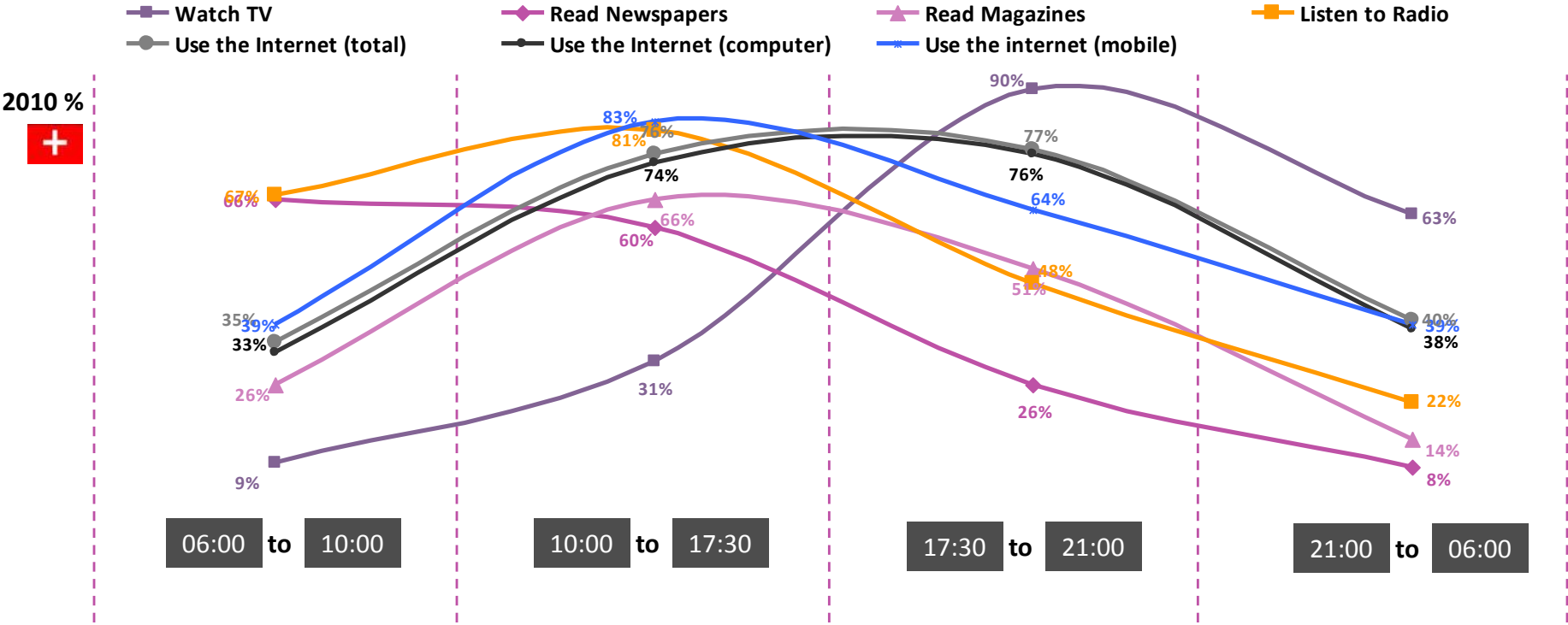
Weekly Internet use – Net & PC vs Mobile (Switzerland)

Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Use the internet via a laptop or desktop computer / Use the internet via a mobile phone or PDA device ?



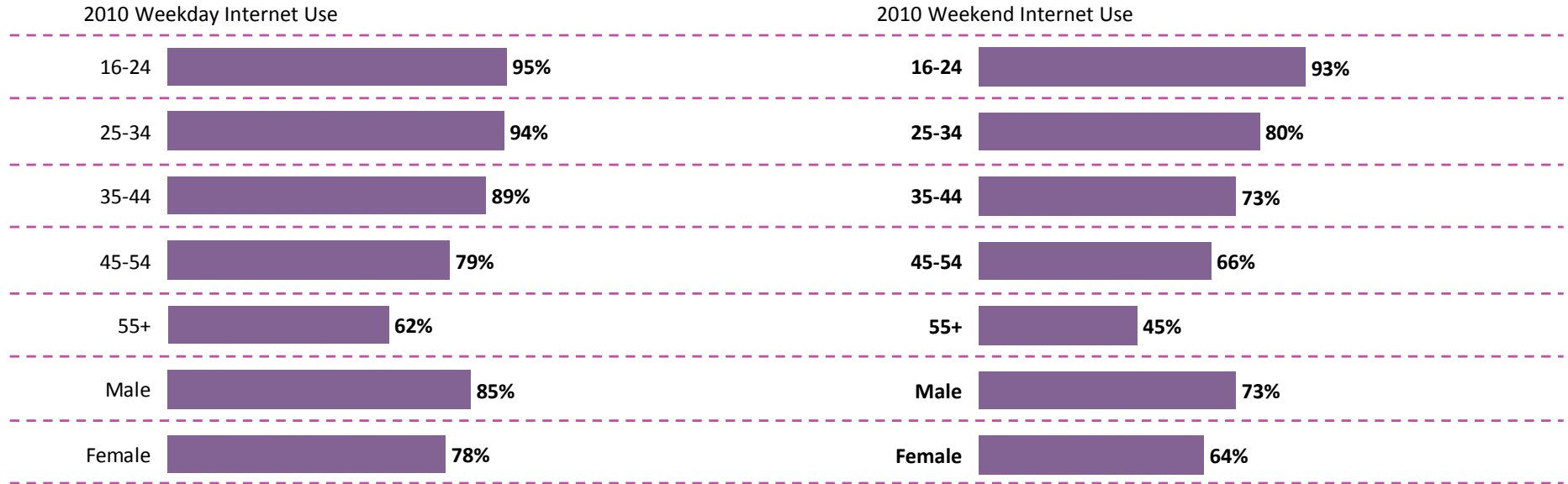
Internet use during the day (Switzerland)

Q1b/2b. What times of the day do you typically...during week?



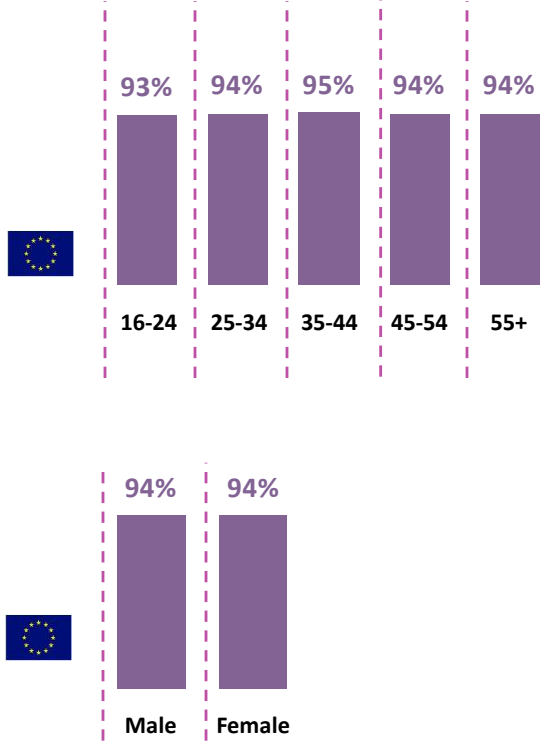
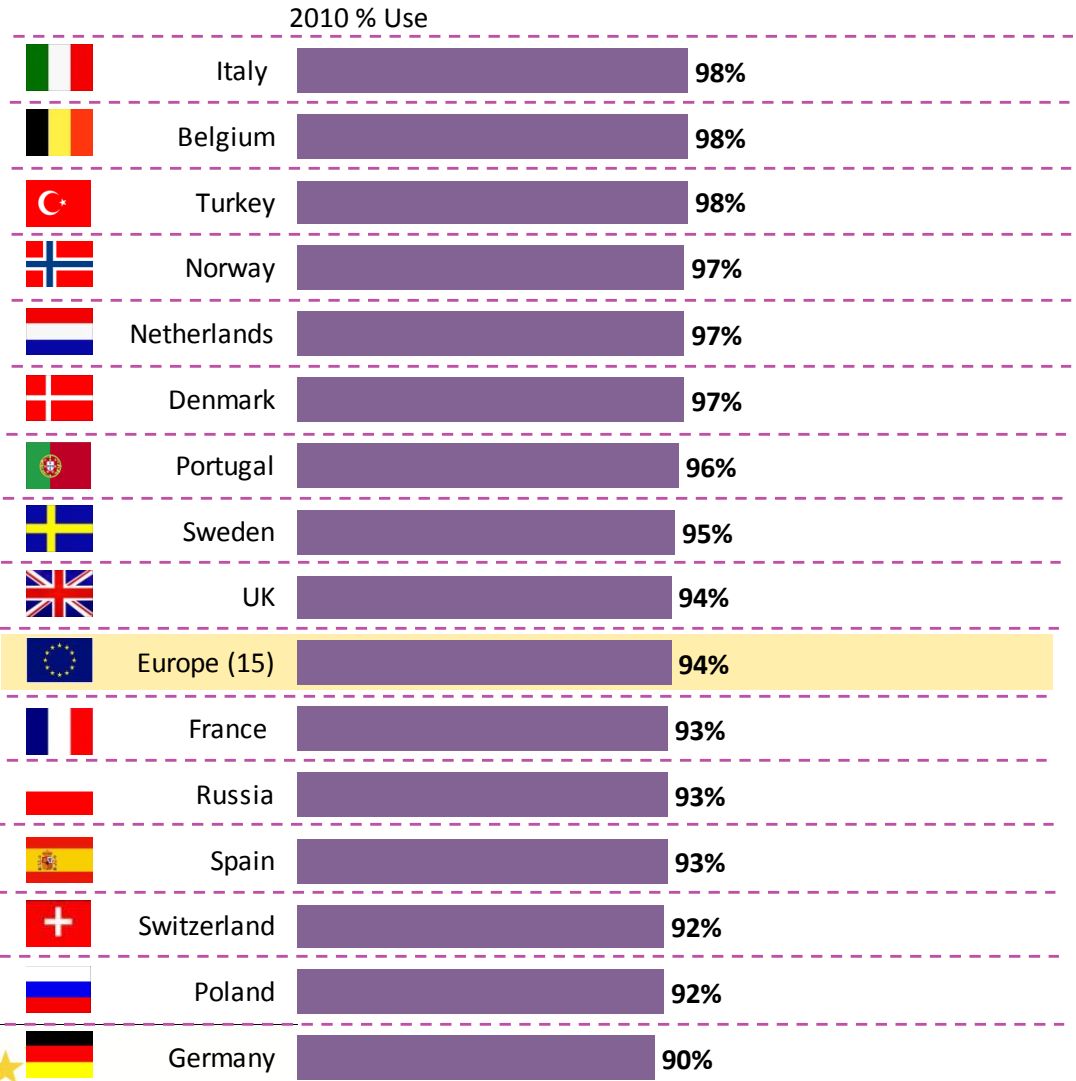
High internet use in age groups 16-44 in Switzerland

Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Use the internet via a laptop or desktop computer / Use the internet via a mobile phone or PDA device ?



Lower than average TV use in Switzerland

Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Watch TV?



[Base: All Respondents in Europe (n=12554)]



Weekly TV use – (Switzerland)

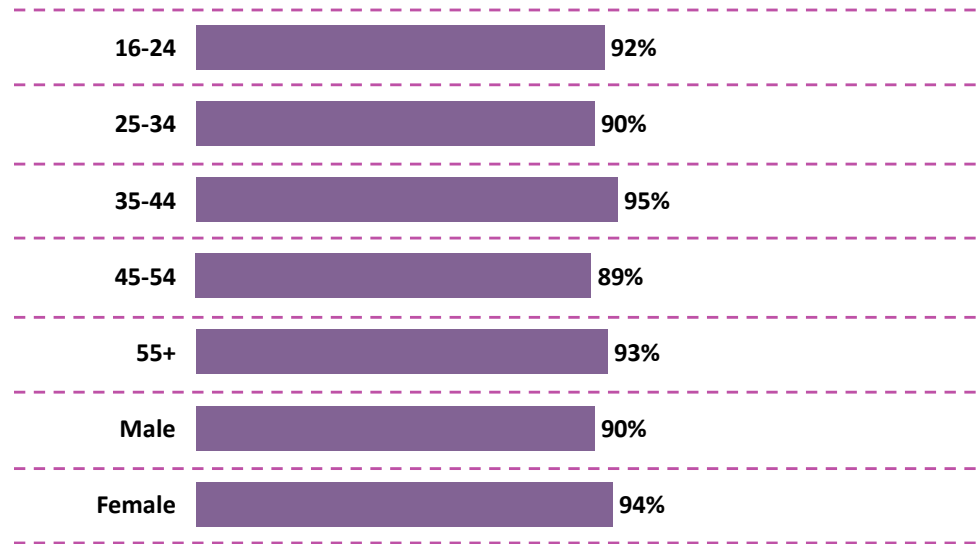
Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you.. Watch TV?



2010 Total TV Use



2010 Total TV Use



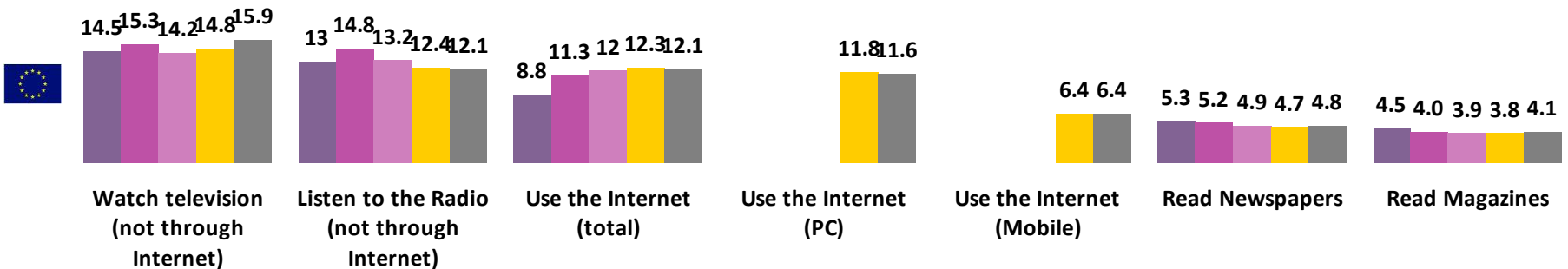
HOW LONG CONSUMERS SPEND WITH EACH MEDIA



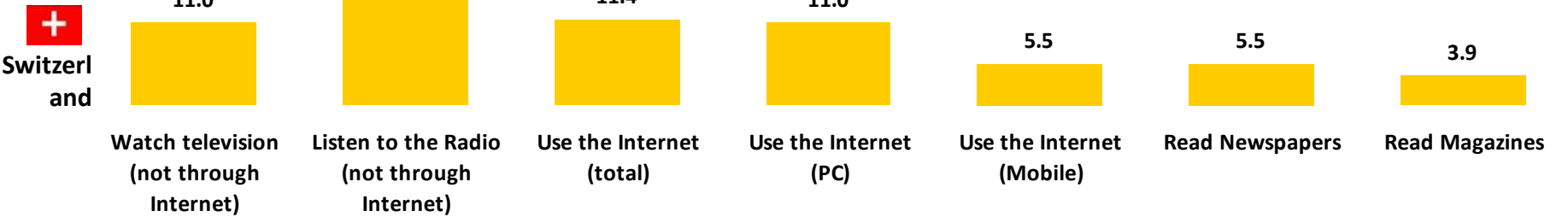
Hours spent per week using each media

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using each media?

■ 2004 ■ 2006 ■ 2008 ■ 2010 (Europe 10) ■ 2010 (Europe 15)



■ 2010



[Base: All Switzerland using each type of media – TV (n=462) Nsp (n=476) Mgz (n=359) Rad (n=428) Int via PC (n=414) Int via Mob (n=86) All Int (n=417)]

Ad investment vs. time spent



Switzerland



Print (Zeitungen & Magazine)



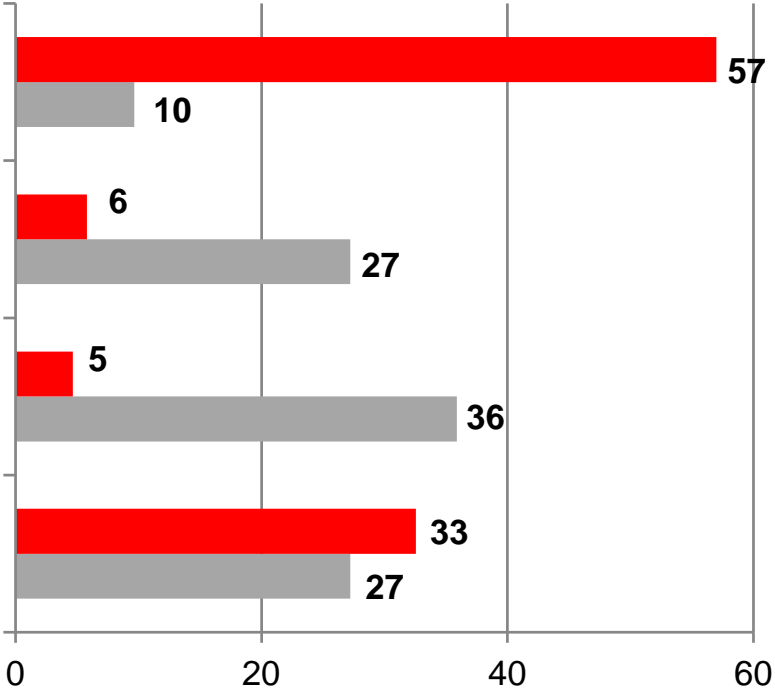
Online



Radio



TV



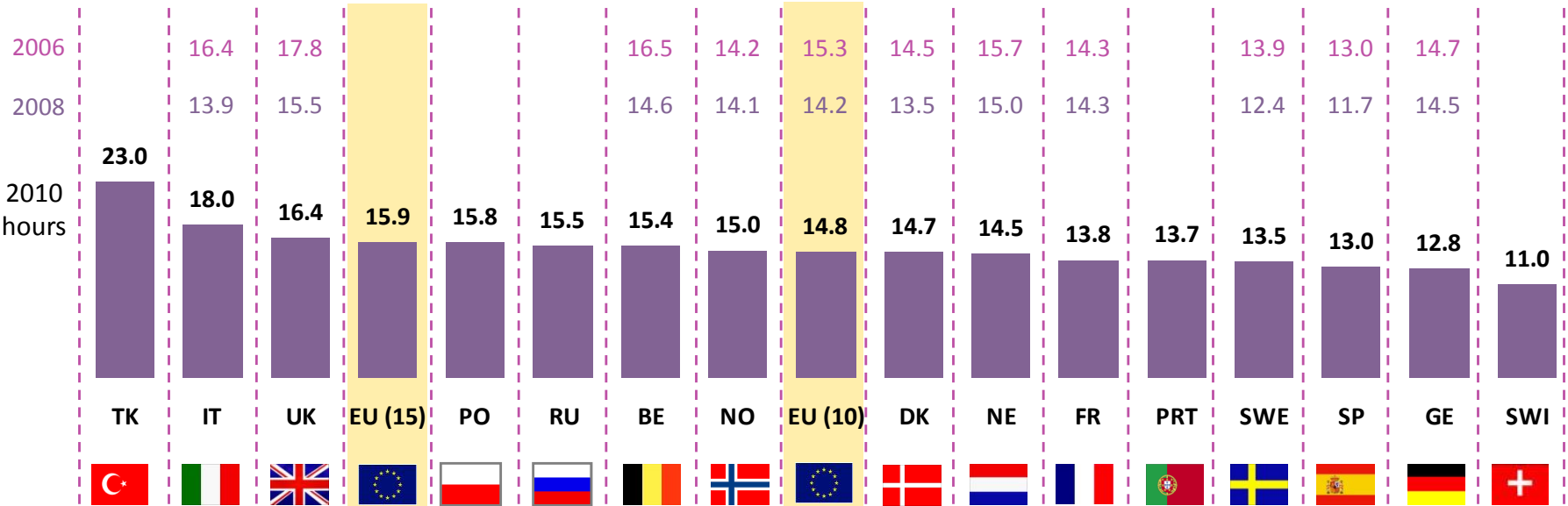
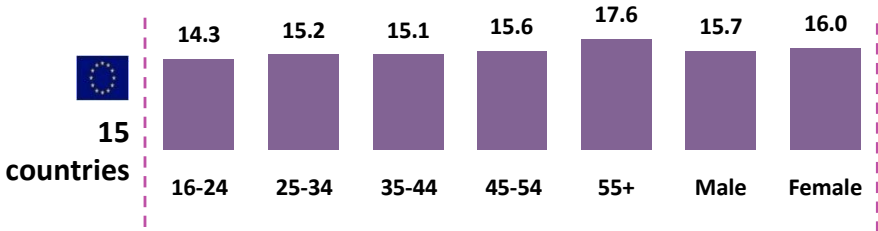
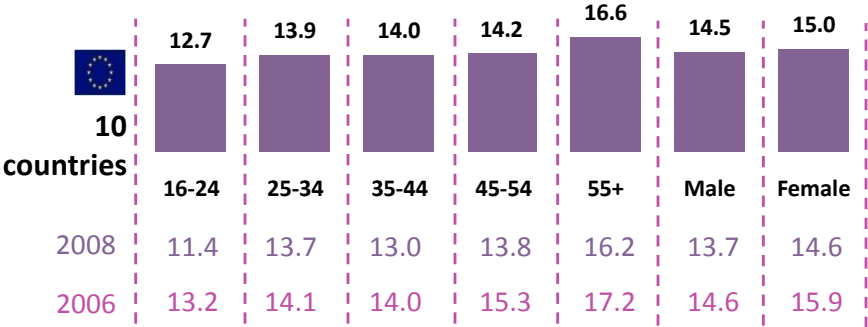
■ % Werbeausgaben pro Medium
 ■ % Nutzung pro Medium

•Quellen:

Werbeinvestitionen: Media Focus Werbedruckstatistik 2009
 Medianutzung: EIAA Mediascope Schweiz, Wöchentliche Nutzung der Medien in %

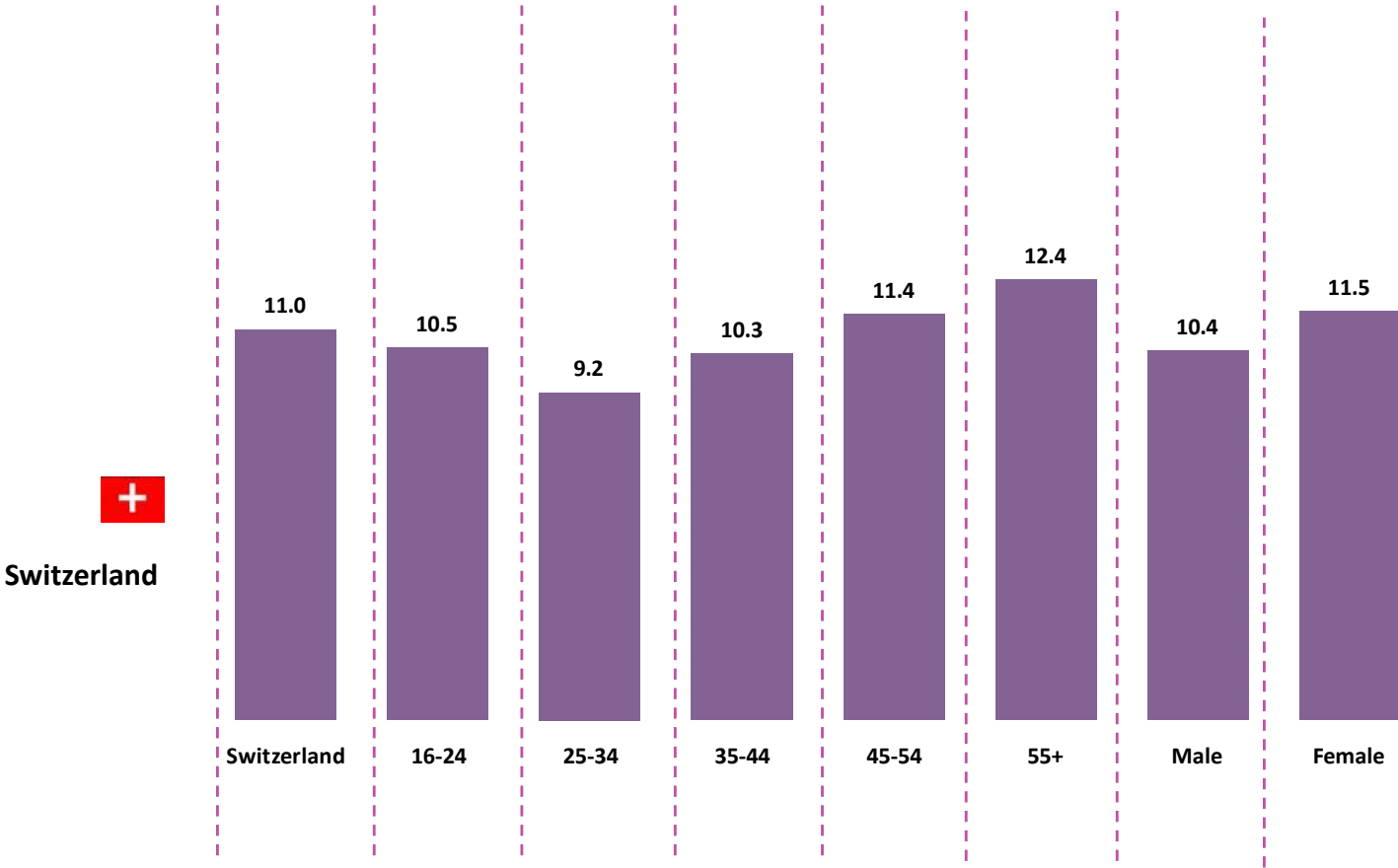
Hours spent watching TV per week by country

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend watching TV?



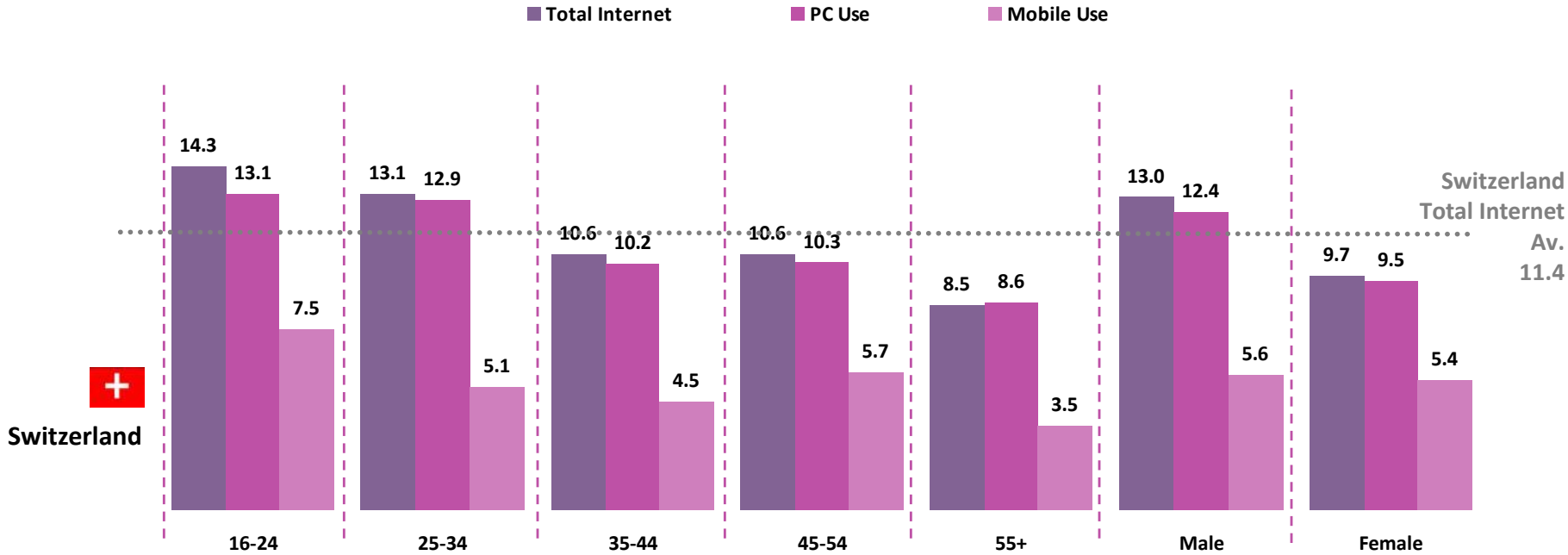
Lowest TV hours in Europe in Switzerland

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend watching TV?



Over 10 hours per week online 16 – 54 in Switzerland

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?



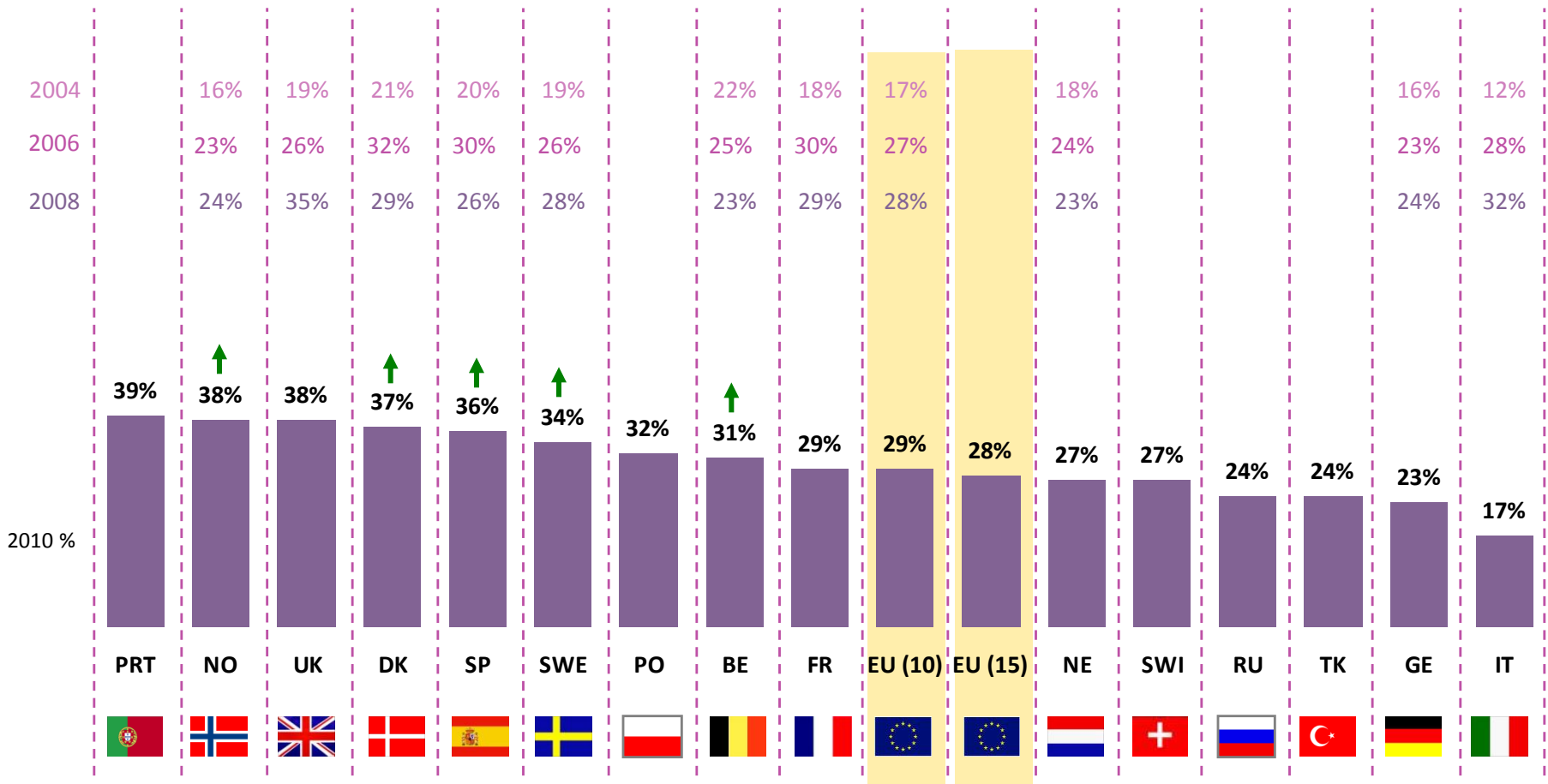
[Base: All Switzerland internet users (n=417)]

[Base: All Switzerland internet on PC users (n=414)]

[Base: All Switzerland internet on mobile users (n=86)]

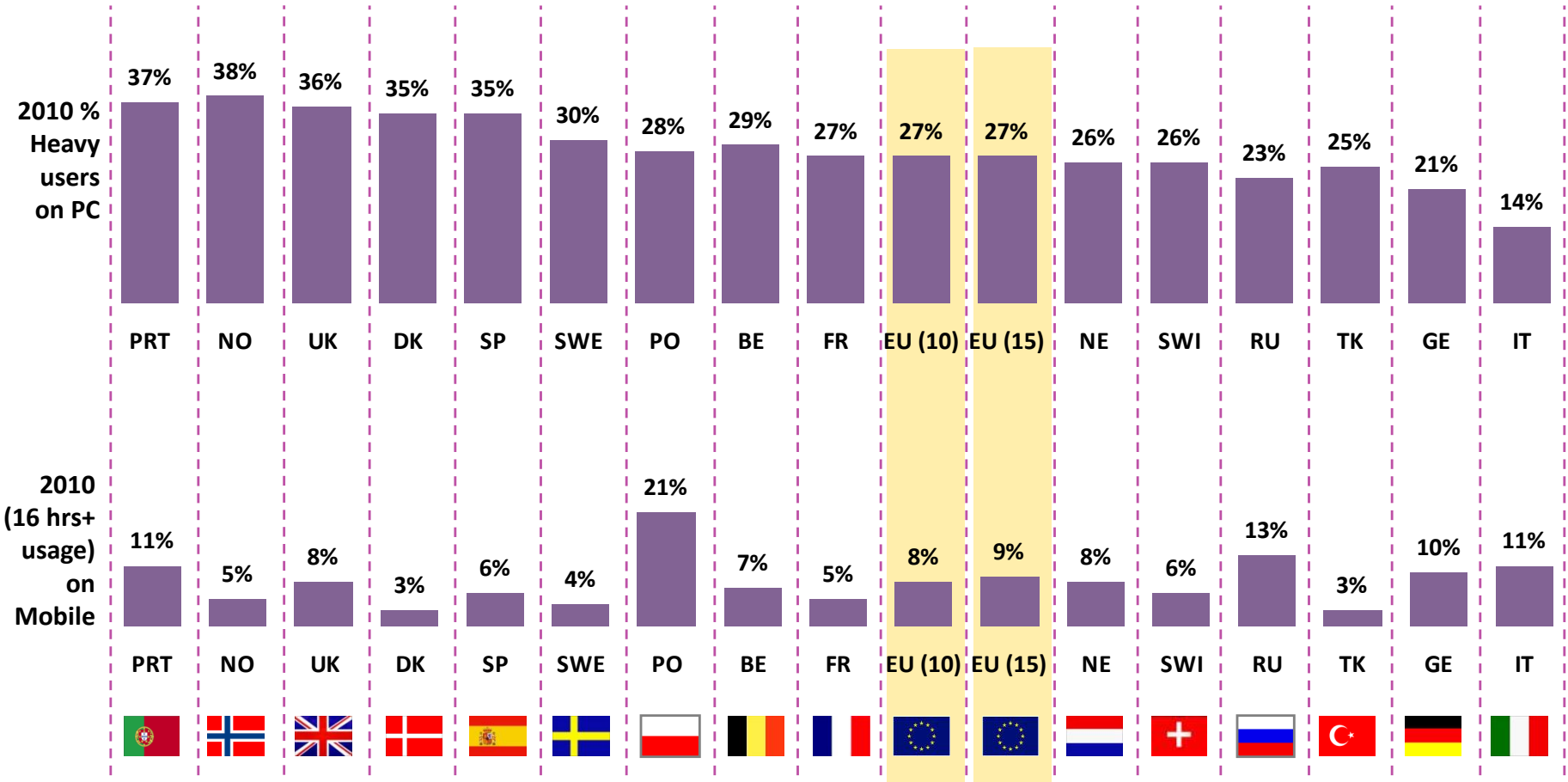
Proportion of heavy internet users – Net PC and Mobile (16hrs+)

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?



Proportion of heavy internet PC vs mobile users (16hrs+)

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?



NB. Heavy users defined as using Internet for 16 hours or more.

[Base: All European (10) internet users (n=5011)]

[Base: All European (10) internet on PC users (n=4969)]

[Base: All European (10) internet on mobile users (n=874)]

[Base: All European (15) internet users (n=7162)]

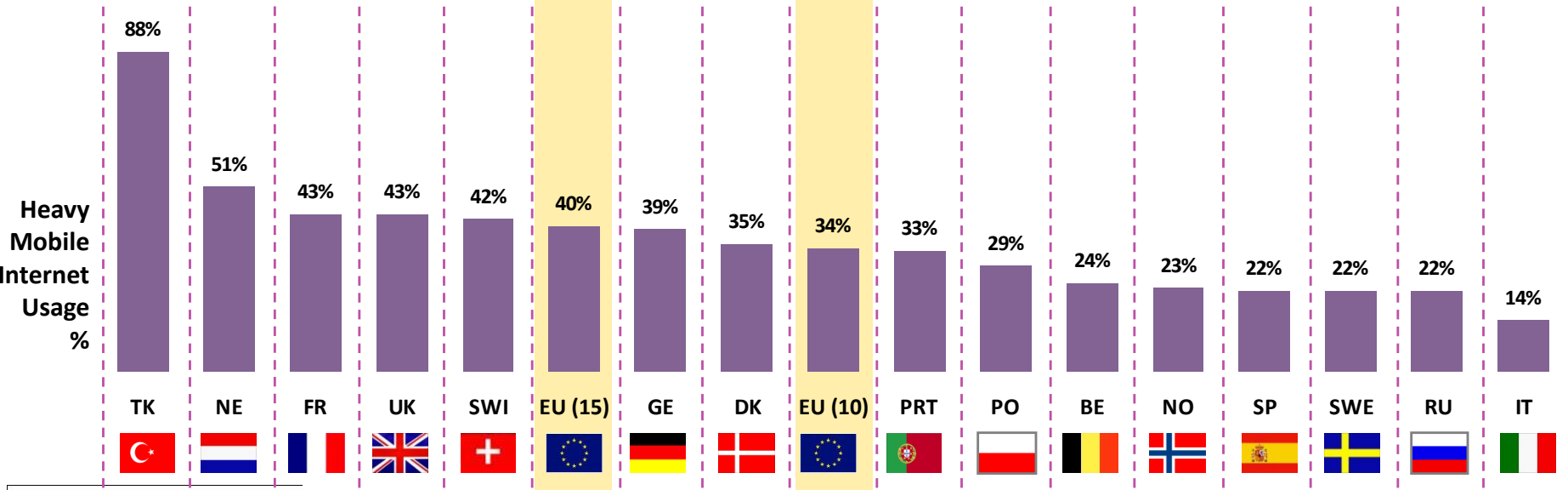
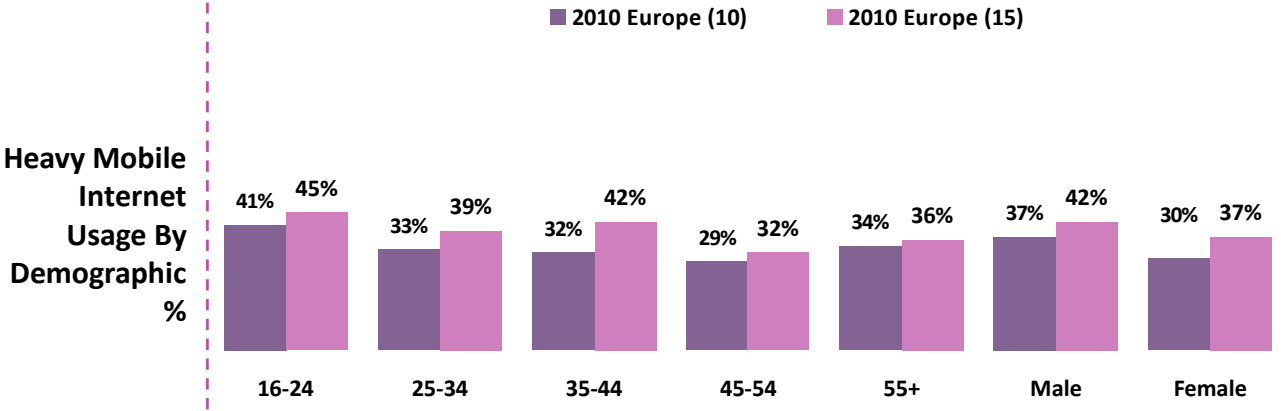
[Base: All European (15) internet on PC users (n=6823)]

[Base: All European (15) internet on mobile users (n=1699)]



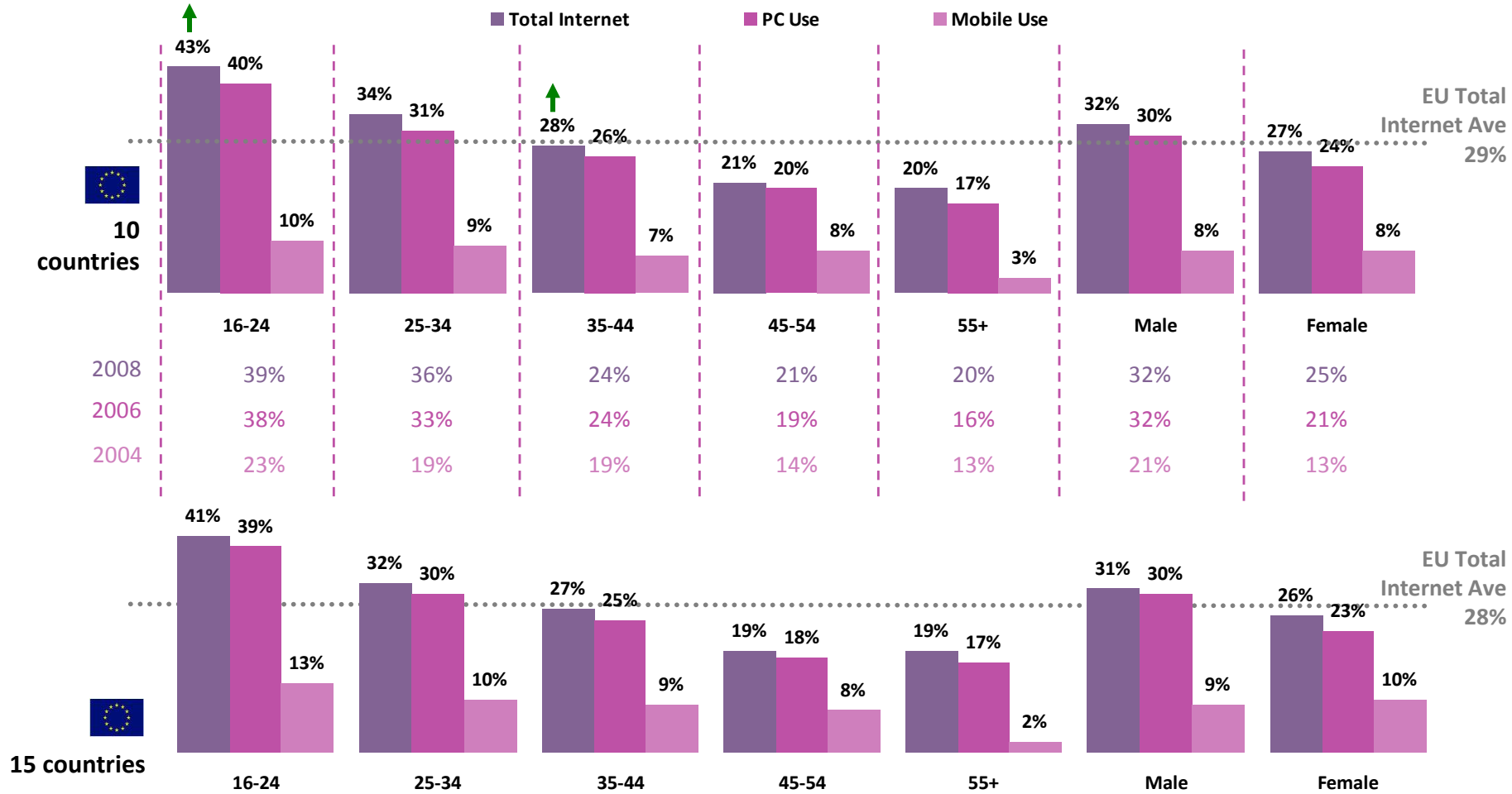
Heavy mobile internet users (Defined as everyday use)

Q4. In a typical seven day week, on how many days do you use the internet?



Heavy internet users – bigger demographic differences across Europe

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?



[Base: All European (10) internet users (n=5011)]

[Base: All European (10) internet on PC users (n=4969)]

[Base: All European (10) internet on mobile users (n=874)]

[Base: All European (15) internet users (n=7162)]

[Base: All European (15) internet on PC users (n=6823)]

[Base: All European (15) internet on mobile users (n=1699)]

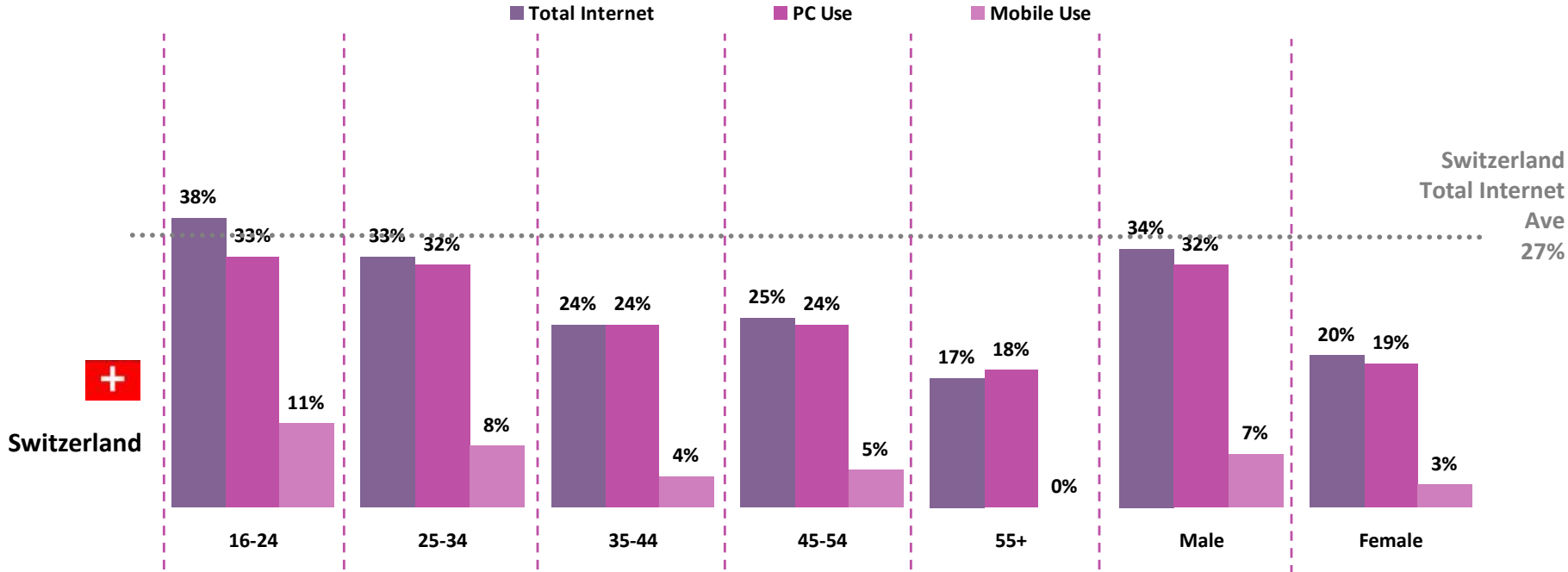


Mediascope Europe



Heavy internet users have more even profile in Switzerland

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?



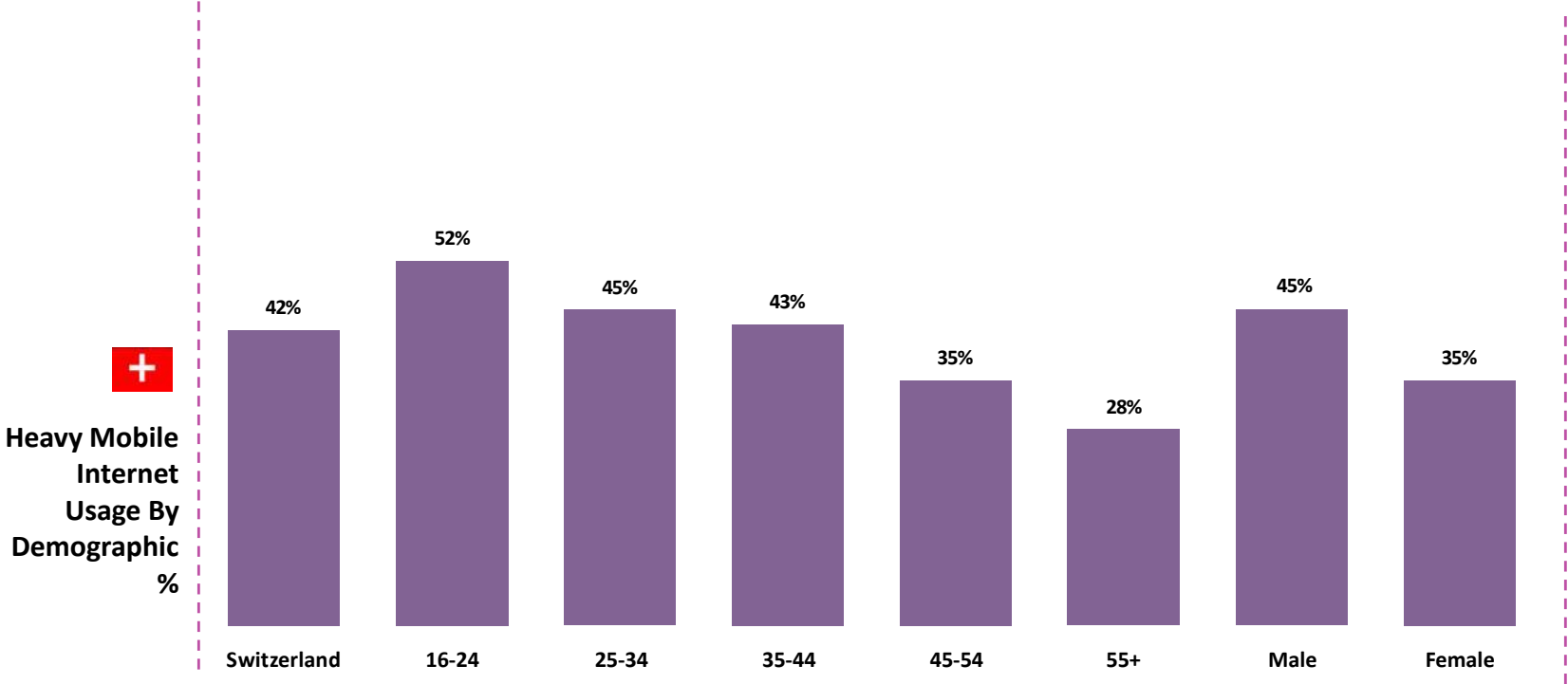
[Base: All Switzerland internet users (n=417)]

[Base: All Switzerland internet on PC users (n=414)]

[Base: All Switzerland internet on mobile users (n=86)]

Heavy mobile internet users (Defined as everyday use) (Switzerland)

Q4. In a typical seven day week, on how many days do you use the internet?



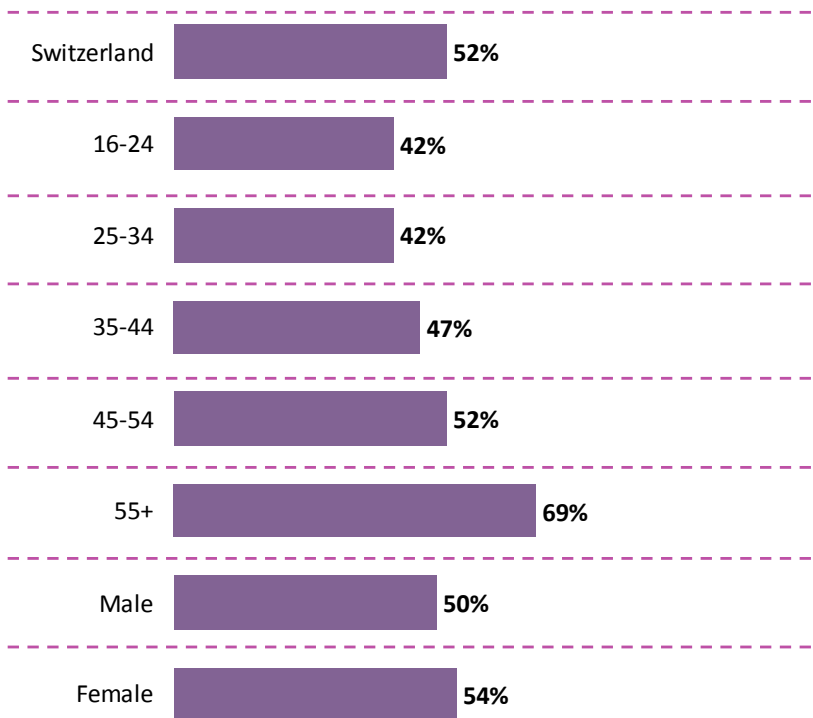
HOW OFTEN INTERNET USERS ARE ONLINE



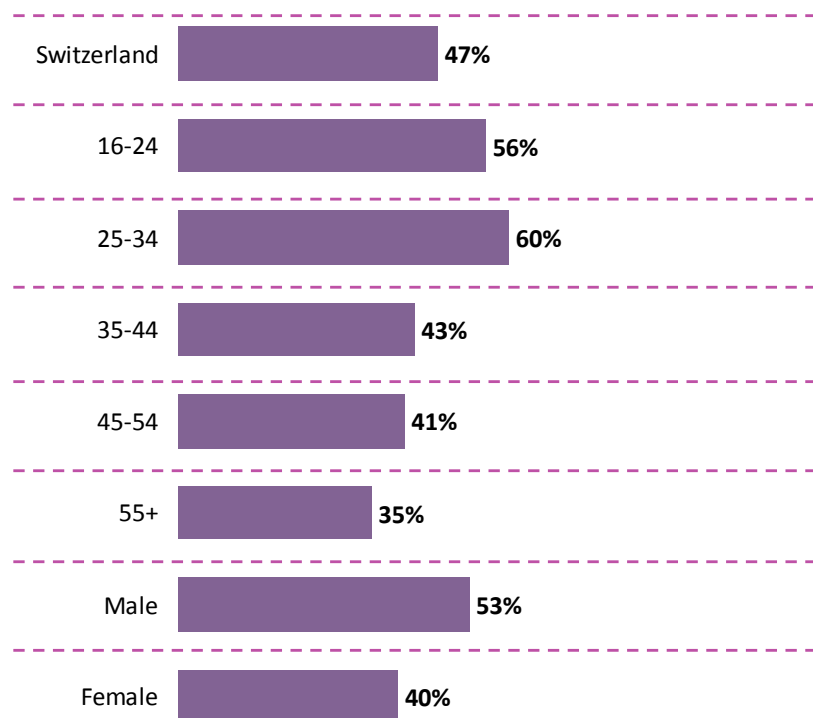
Proportion of TV and internet users online everyday in Switzerland

Q4. In a typical seven day week, on how many days do you watch TV/use the internet?

TV Usage %

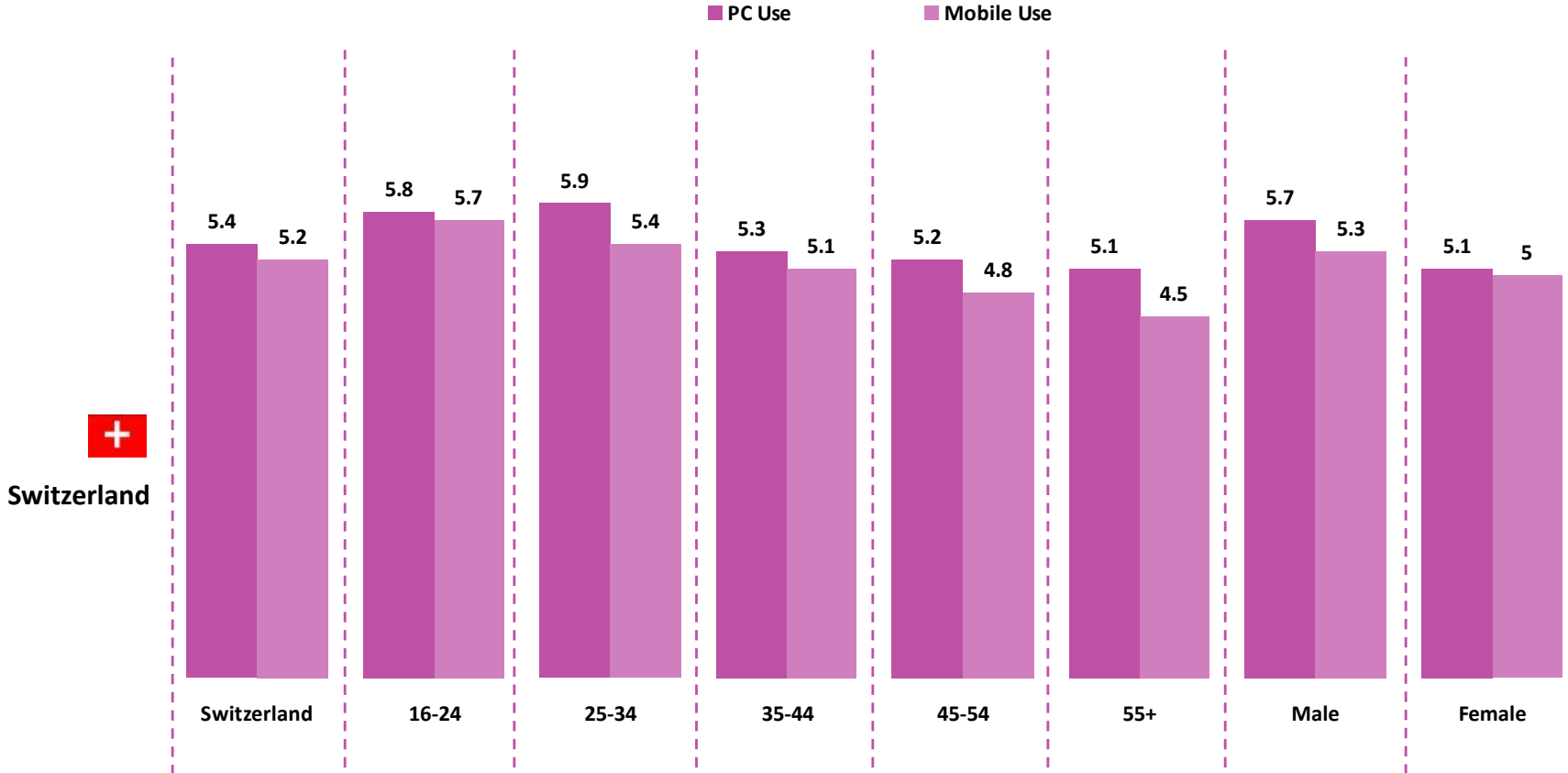


Internet PC Usage %



Days spent online in a typical week by demographic (Switzerland)

Q4. In a typical seven day week, on how many days do you use the internet?

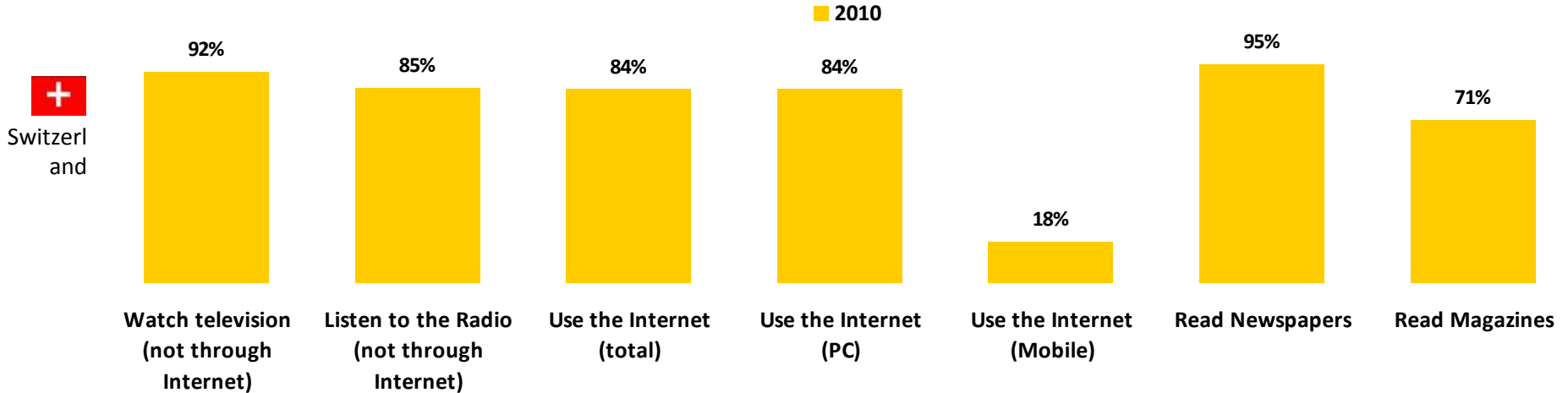
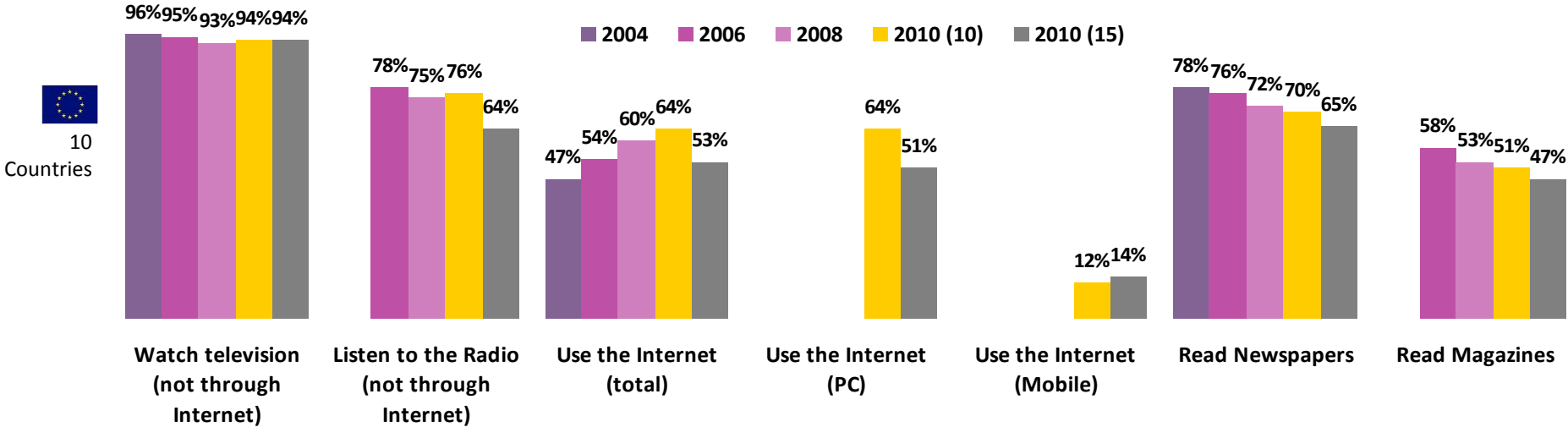


MEDIA MESHING



Media Consumption

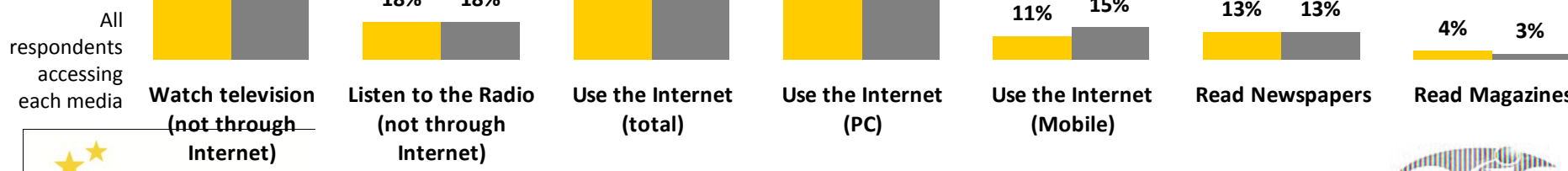
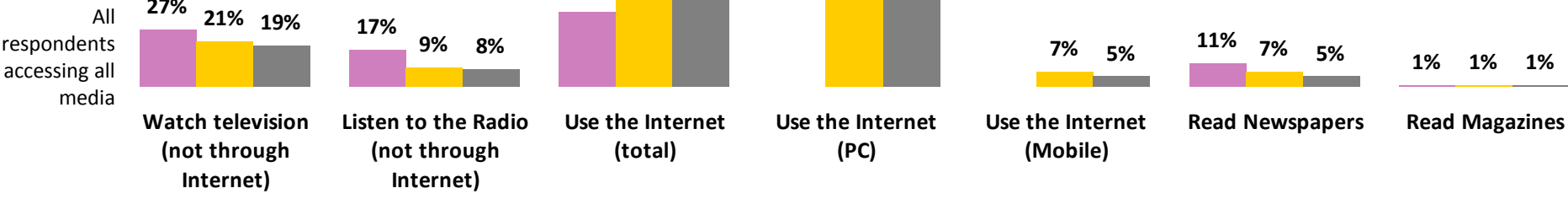
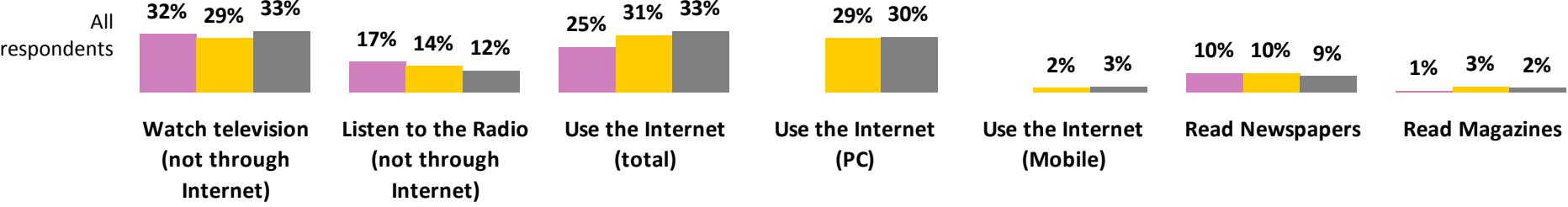
Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you...?



Media would be lost without - Europe

Q5h. Which one type of media do you think fits best with this statement?

■ 2008 ■ 2010 (10 Countries) ■ 2010 (15 Countries)



NB. %s given for media access .i.e. 31% for television is among TV viewers. 18% for radio is among radio listeners etc.

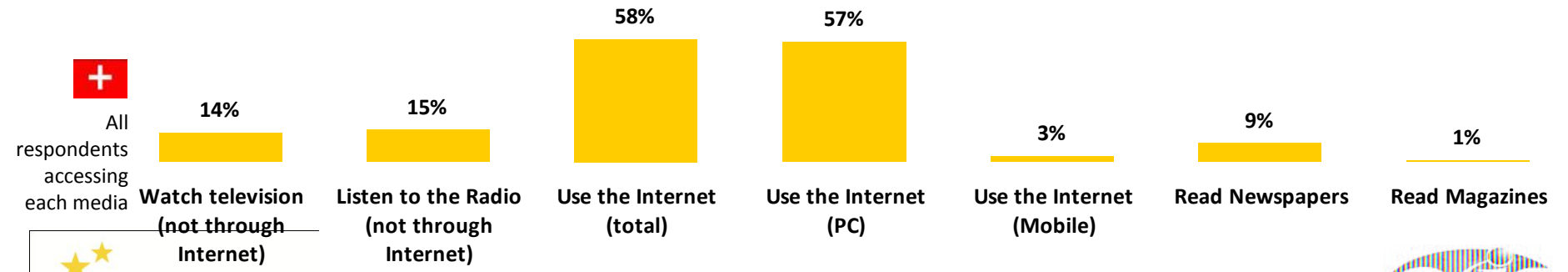
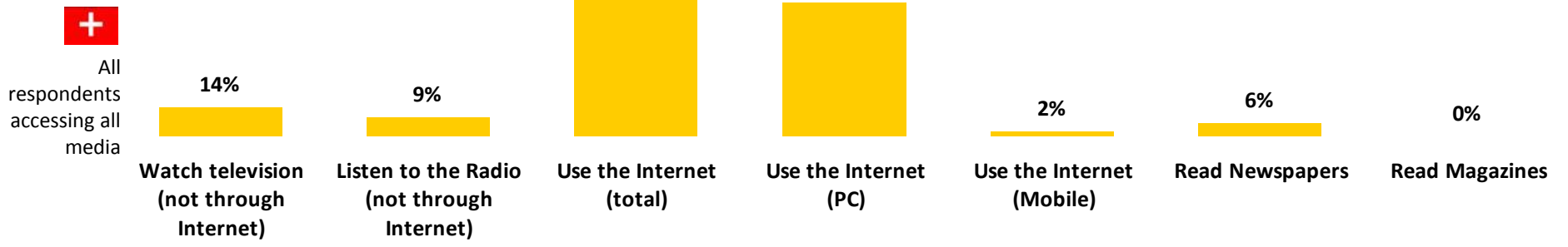
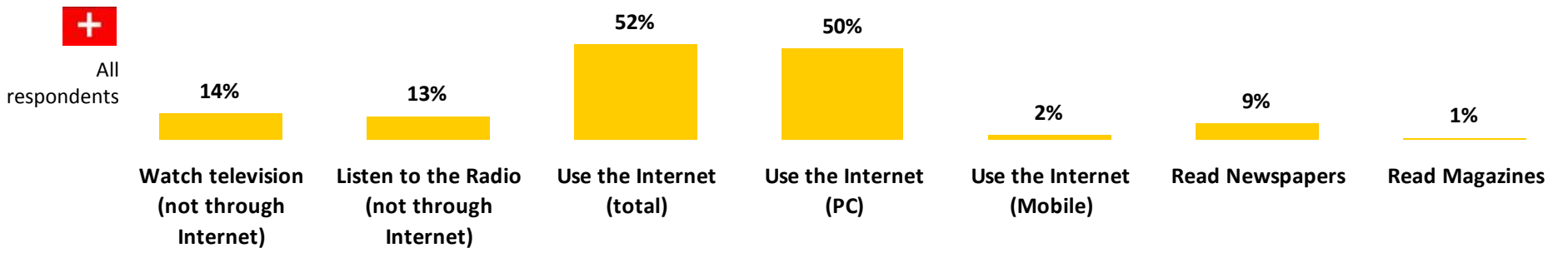
[Base: All Europe Respondents (n=10103/15142)] [Base: All Europe Respondents accessing all media (n=444/940)]



High dependence on internet in Switzerland

Q5h. Which one type of media do you think fits best with this statement?

2010

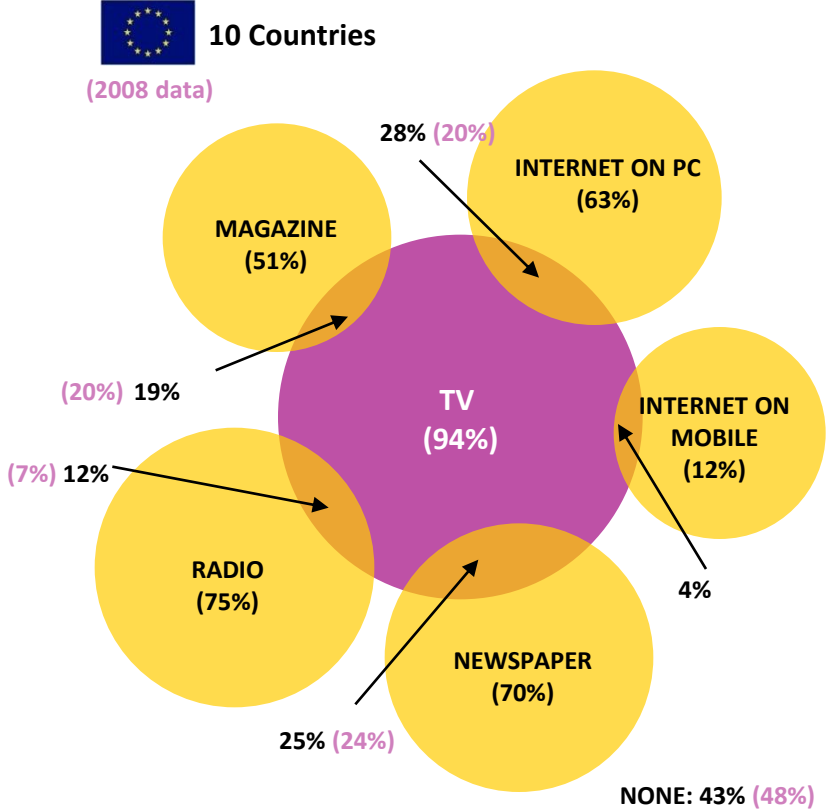


[Base: All Switzerland Respondents (n=501)]

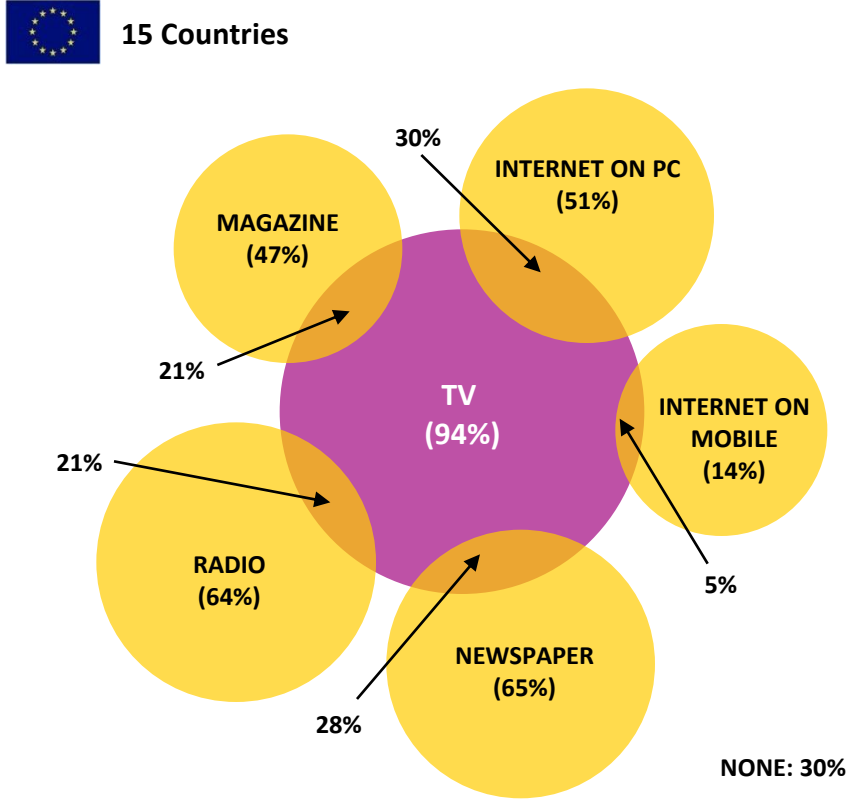
[Base: All Switzerland Respondents accessing all media (n=106)]

Media Meshing: TV - other media used

Q5b-f. When you're mainly watching TV, which other media do you sometimes use?



[Base: All Europeans (10) who watch TV (n=9385)]

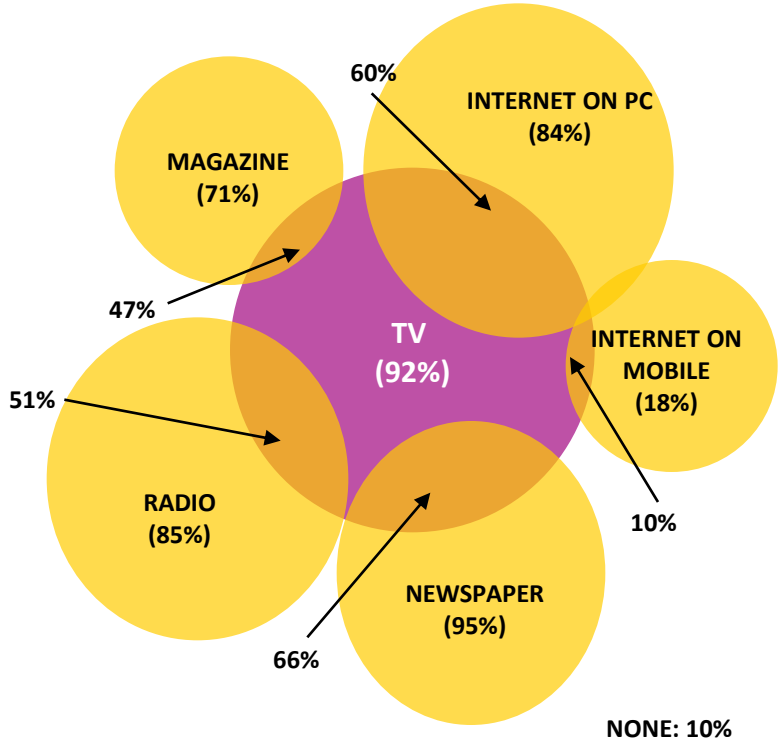


[Base: All Europeans (15) who watch TV (n=13918)]

Media Meshing: TV/Radio - other media used (Switzerland)

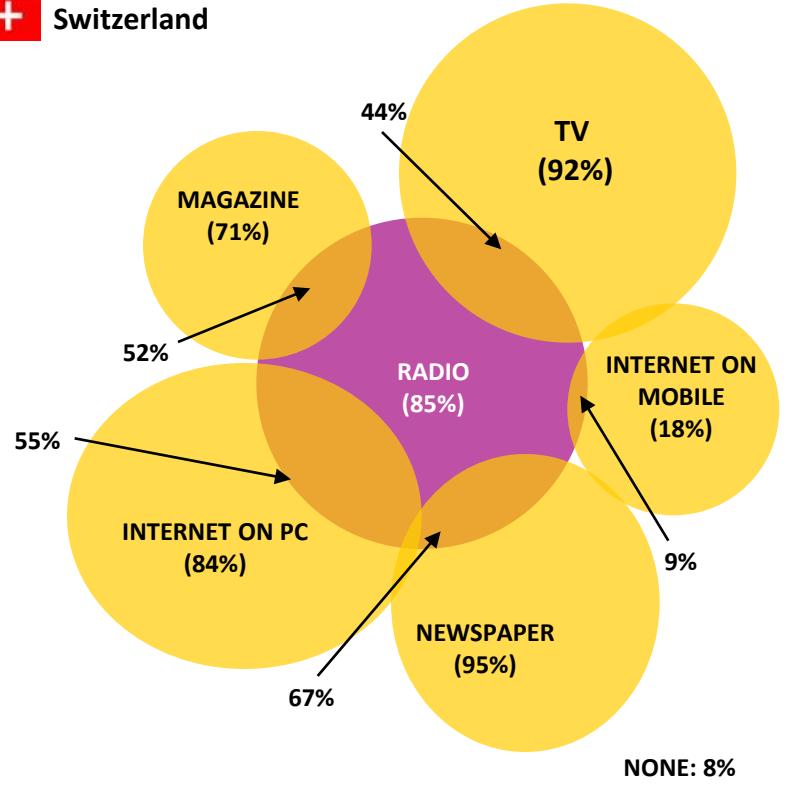
Q5b-f. When you're mainly watching TV, which other media do you sometimes use?

+ Switzerland



[Base: All Switzerland who watch TV (n=915)]

+ Switzerland

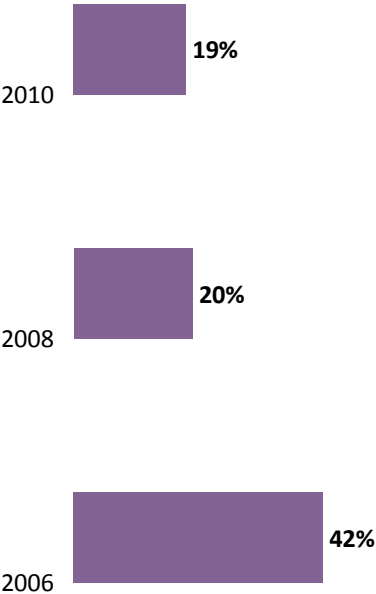


[Base: All Switzerland who use radio (n=767)]

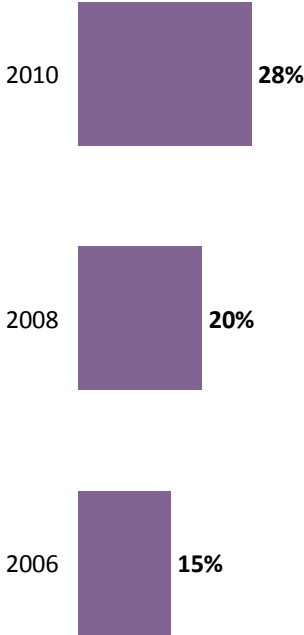
European trends in media meshing

Q4. In a typical seven day week, on how many days do you watch TV/use the internet?

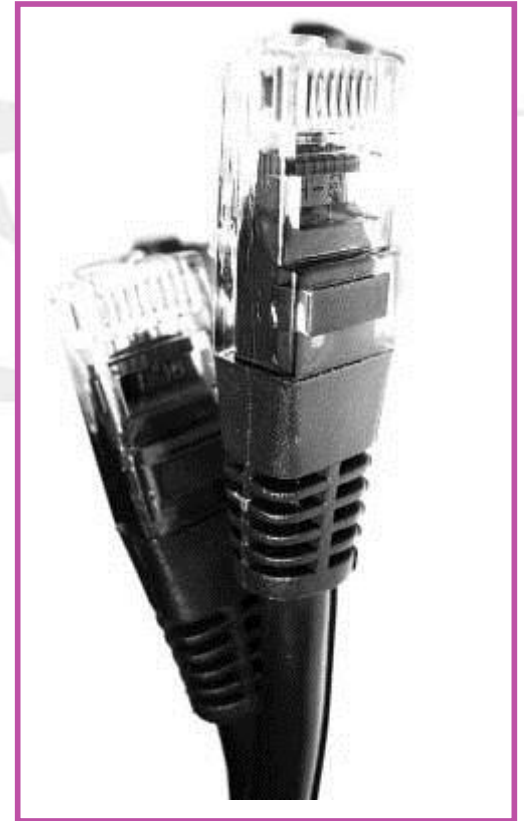
TV/Newspapers



TV/Internet

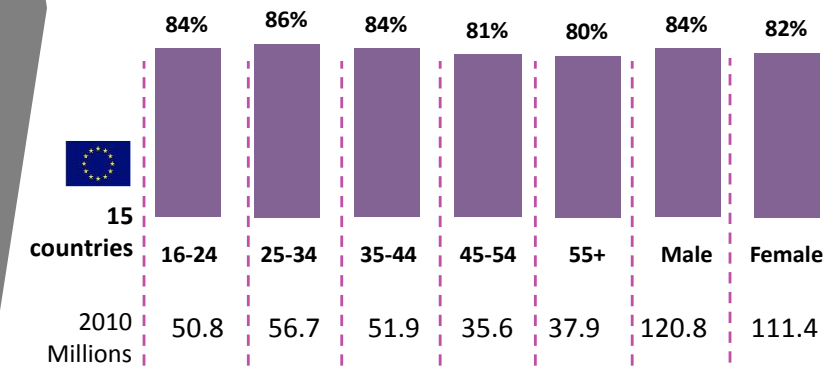
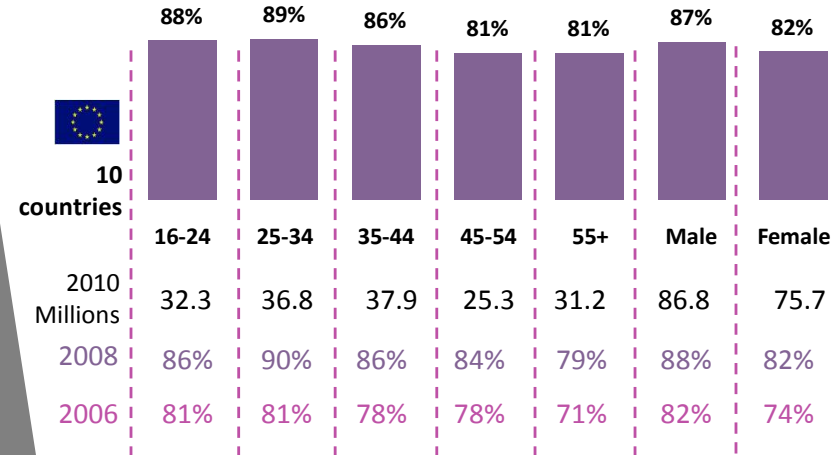
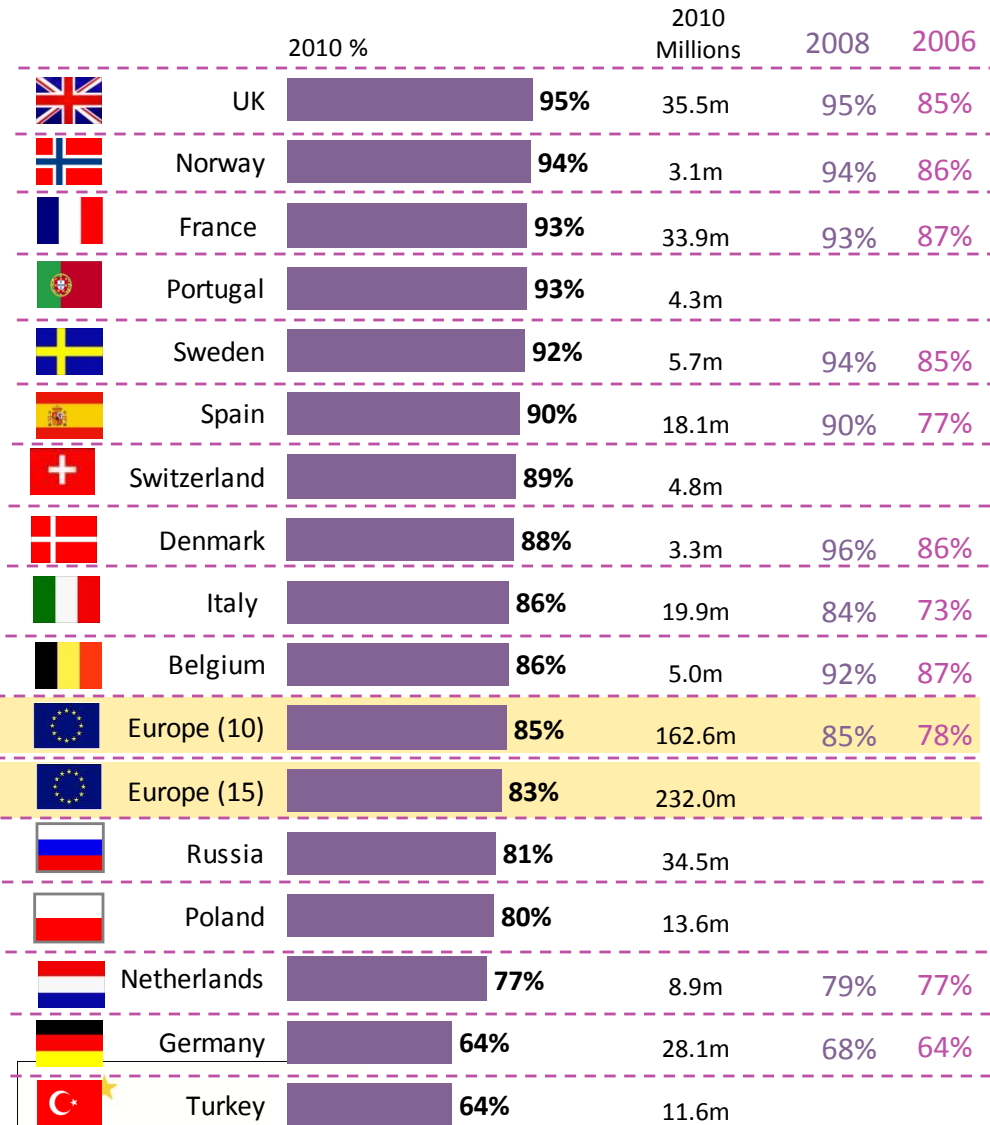


THE ROLE OF BROADBAND



Broadband penetration rates

QC3. Thinking about the place where you use the Internet the most, do you have a broadband connection?



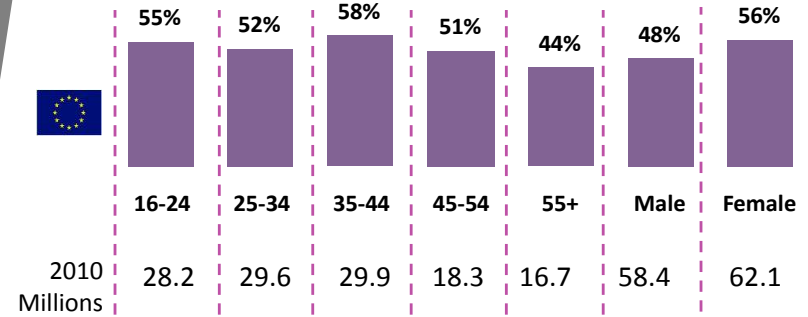
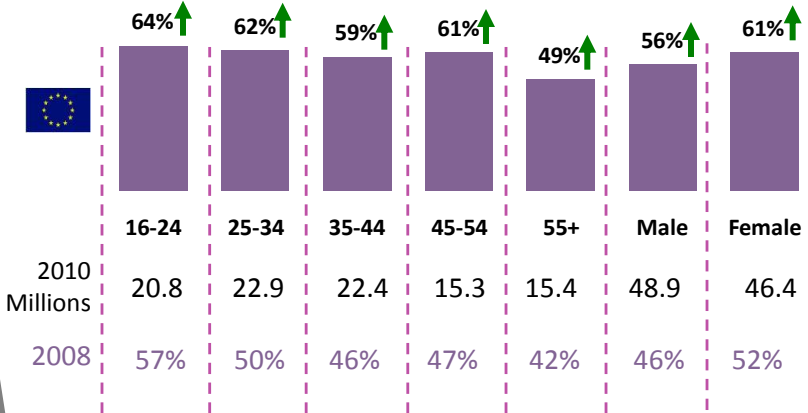
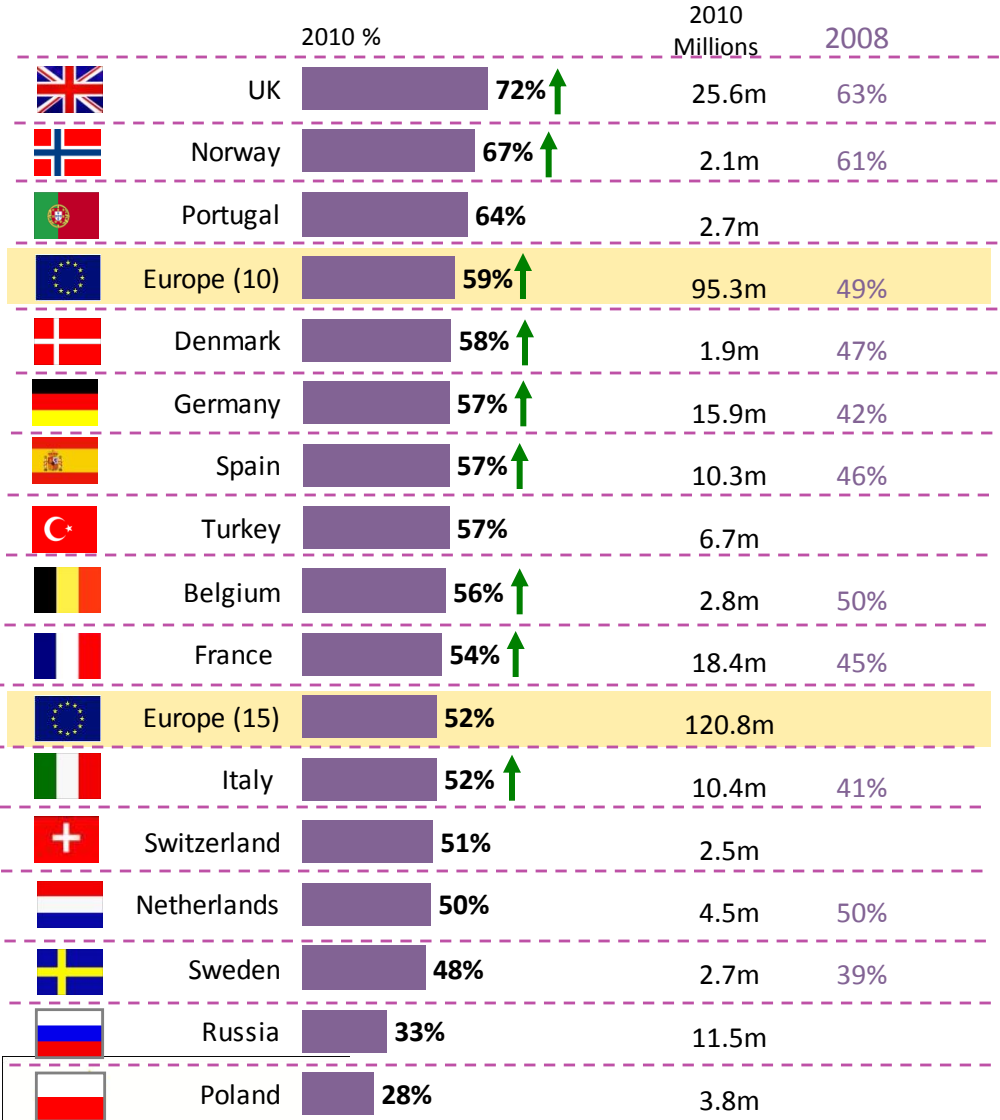
[Base: All European 10 internet users (n=7699)]

[Base: All European 15 internet users (n=12053)]



Wireless broadband penetration rates

QC3b. And is this connection wireless?



[Base: All European 10 broadband users (n=6687)]
 [Base: All European 15 broadband users (n=10330)]

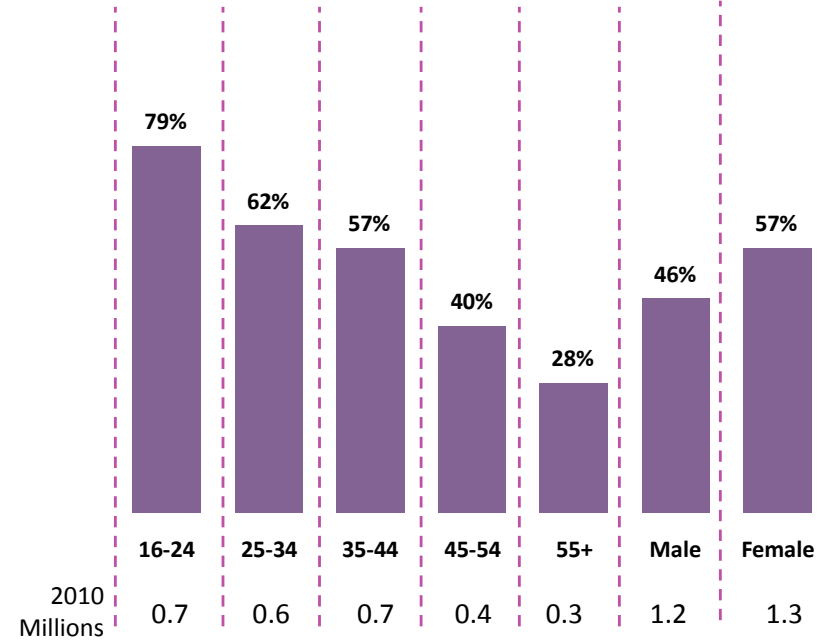
Broadband /wireless demographics penetration rates (Switzerland)

QC3. Thinking about the place where you use the Internet the most, do you have a broadband connection?
 QC3b. And is this connection wireless?

+ Switzerland – Broadband Penetration



+ Switzerland – Wireless Broadband Penetration



[Base: All Switzerland internet users (n=849)]

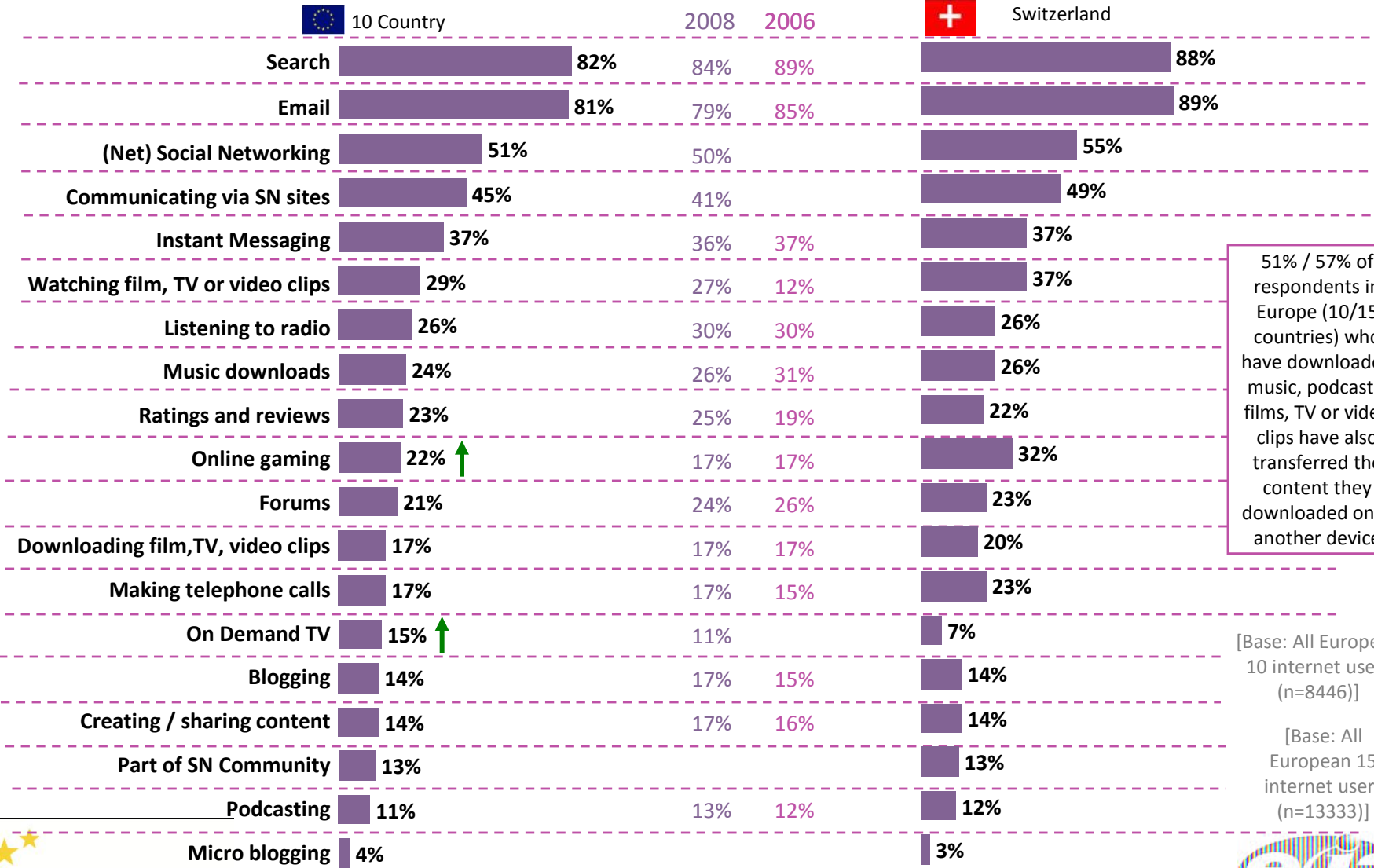
[Base: All Switzerland broadband users (n=772)]

CONSUMER USE OF THE INTERNET



Wide range of internet activities in Switzerland

Q7b. Which of the following types of web activities do you use at least once a month? Q7bi2. Have you transferred any of the content you downloaded on to another device?



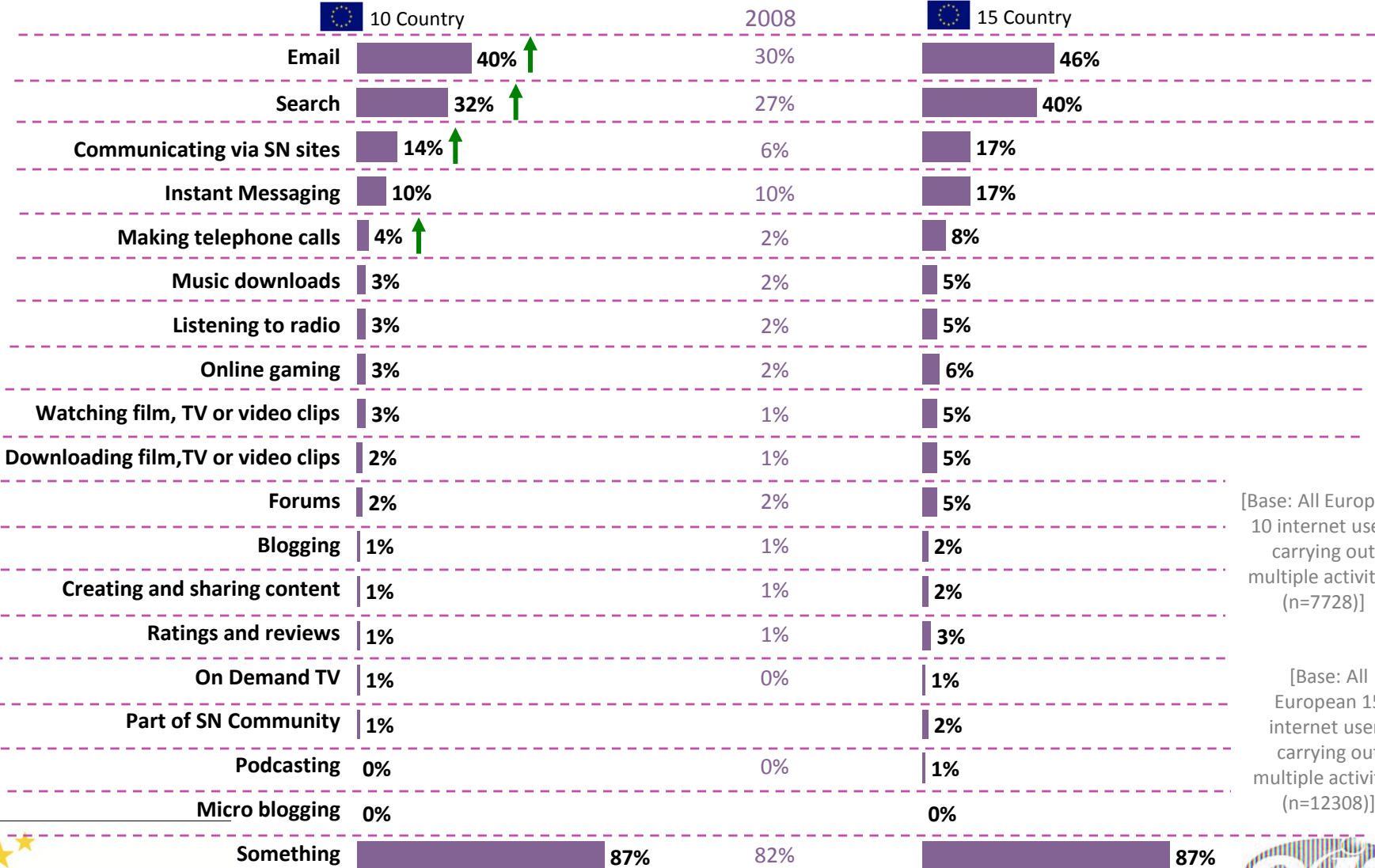
51% / 57% of respondents in Europe (10/15 countries) who have downloaded music, podcasts, films, TV or video clips have also transferred the content they downloaded onto another device

[Base: All European 10 internet users (n=8446)]

[Base: All European 15 internet users (n=13333)]

Activities cannot live without

Q7bi. And which of those web activities that you undertake monthly could you not live without?

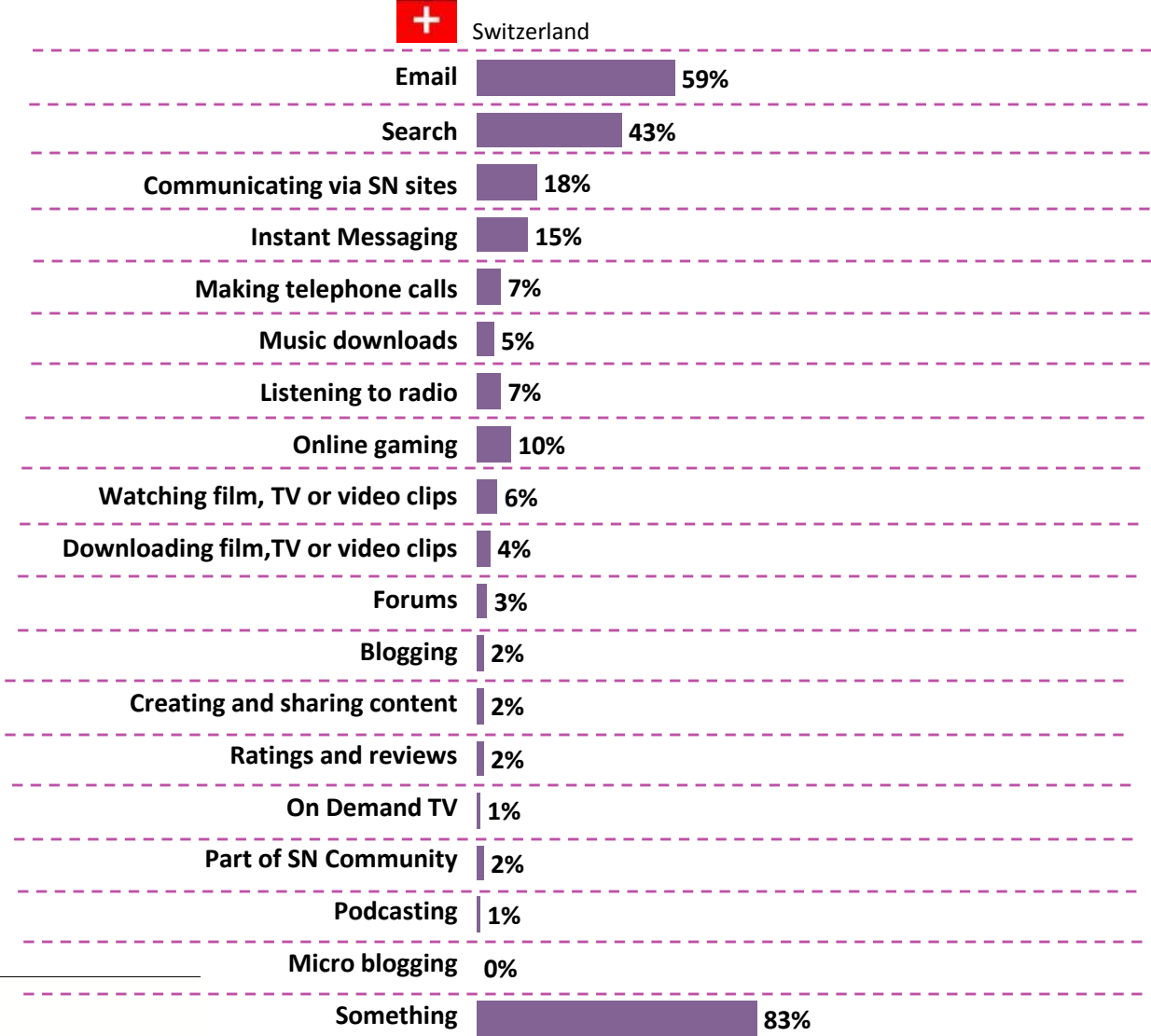


[Base: All European 10 internet users carrying out multiple activities (n=7728)]

[Base: All European 15 internet users carrying out multiple activities (n=12308)]

Swiss people engaged with and dependent on internet

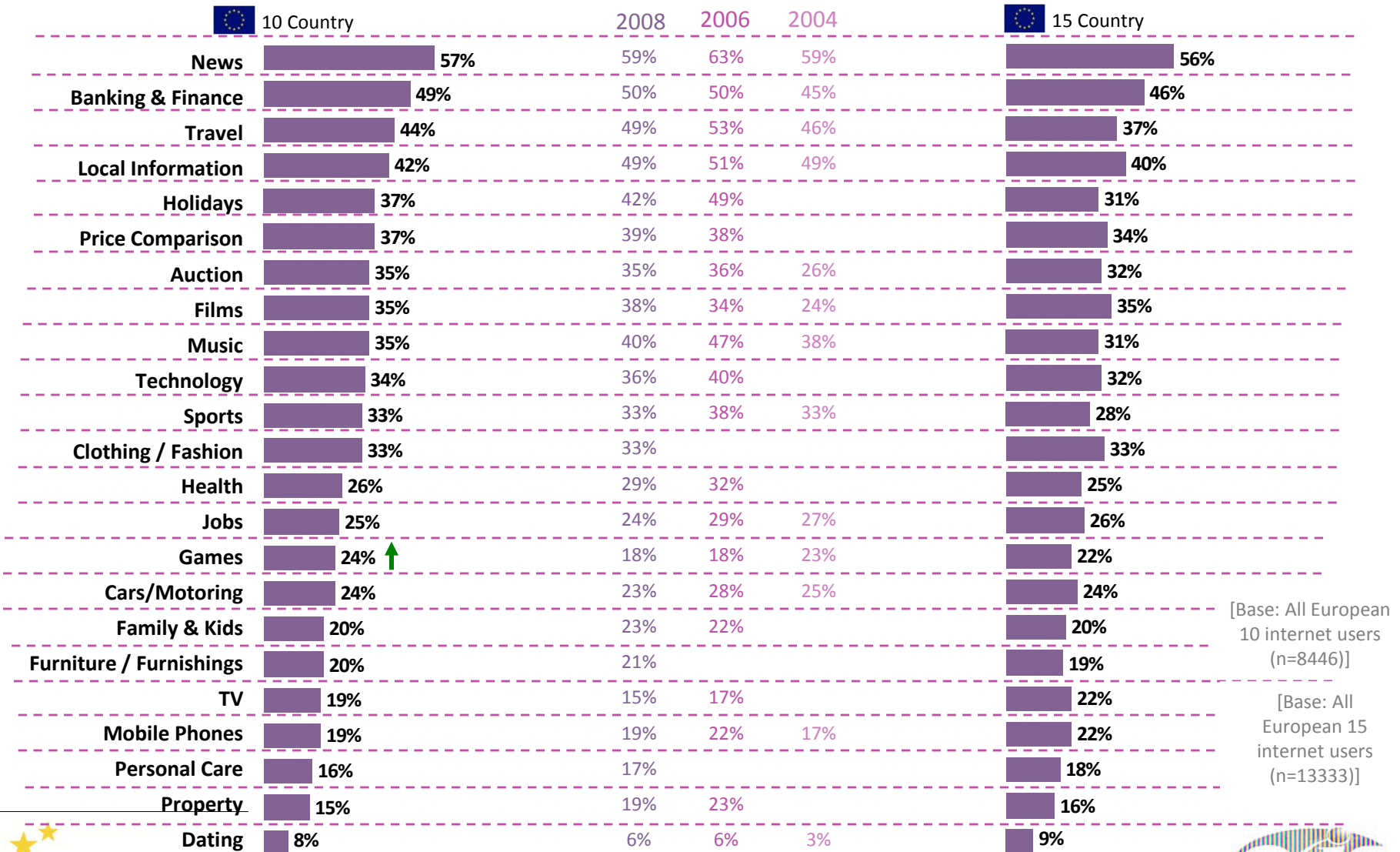
Q7bi. And which of those web activities that you undertake monthly could you not live without?



[Base: All Switzerland internet users carrying out multiple activities (n=896)]

Leading website types

Q7a. Which of the following types of websites do you visit at least once a month?

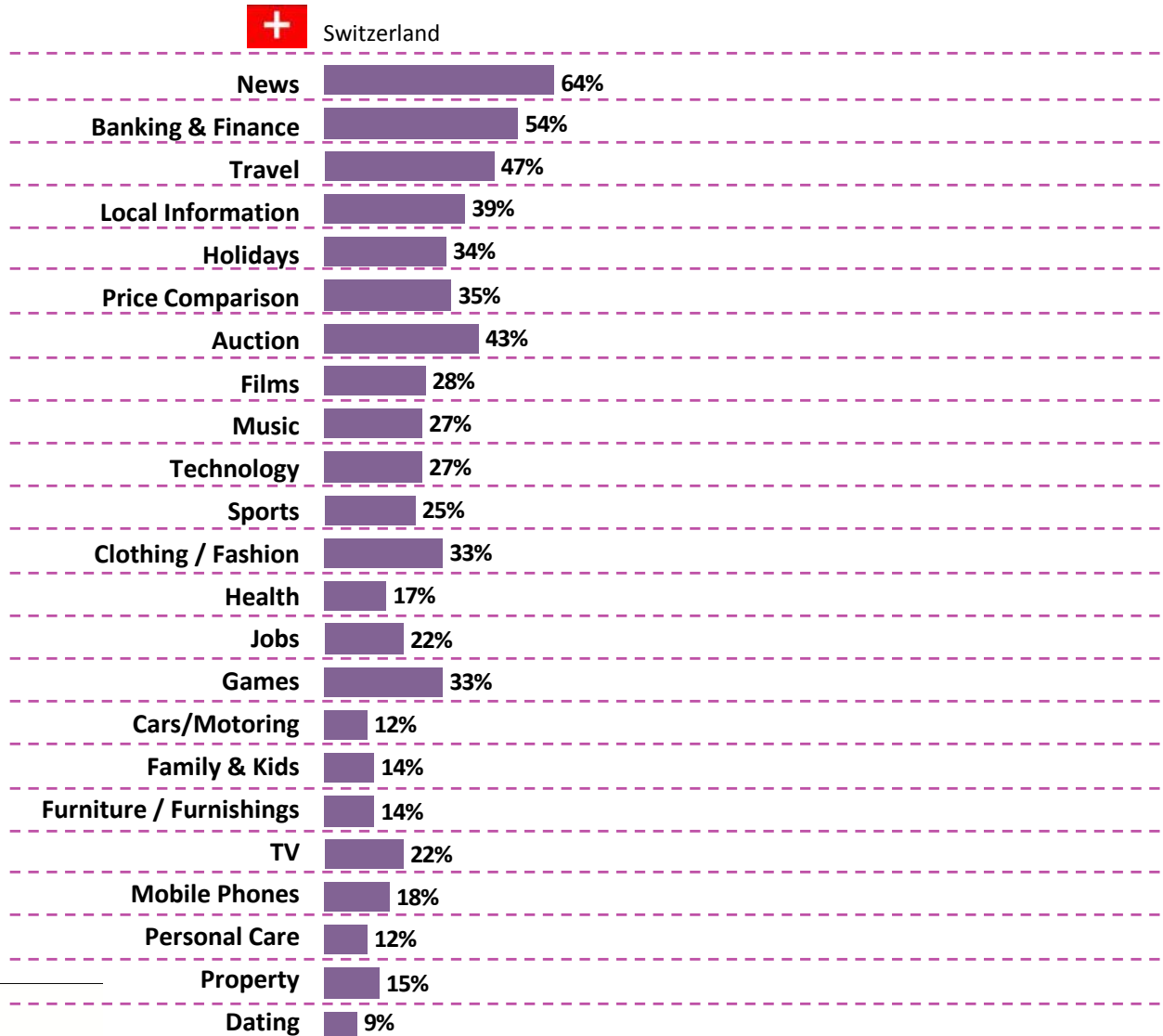


[Base: All European 10 internet users (n=8446)]

[Base: All European 15 internet users (n=13333)]

News leads website types in Switzerland

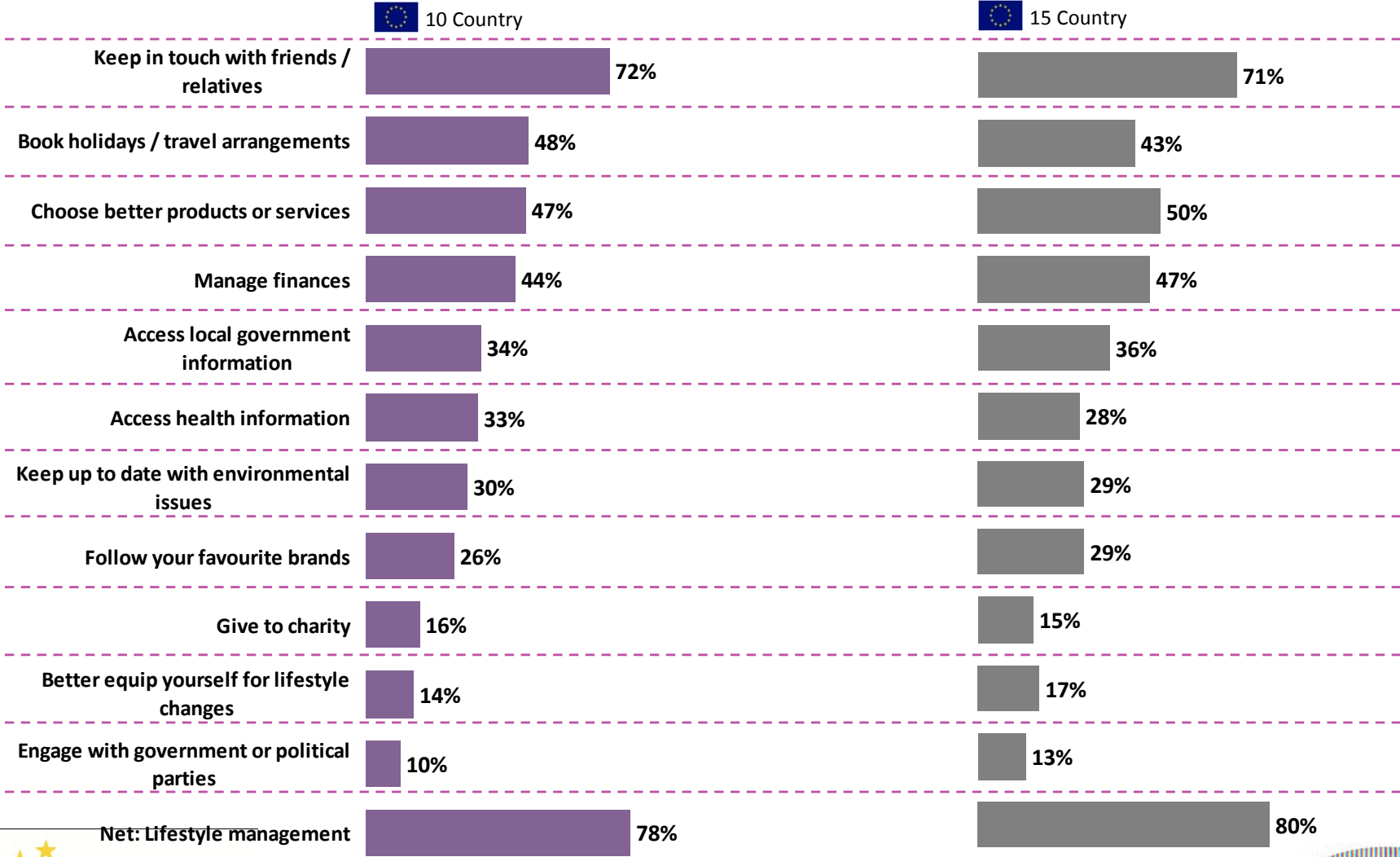
Q7a. Which of the following types of websites do you visit at least once a month?



[Base: All Switzerland internet users (n=947)]

Internet's impact on lifestyle

Q20c. Which of the following do you do you feel you have been able to do more of as a result of using the internet?
















[Base: All European 10 internet users (n=8446)]

[Base: All European 15 internet users (n=13333)]

Internet's impact on lifestyle – brands are important in Switzerland

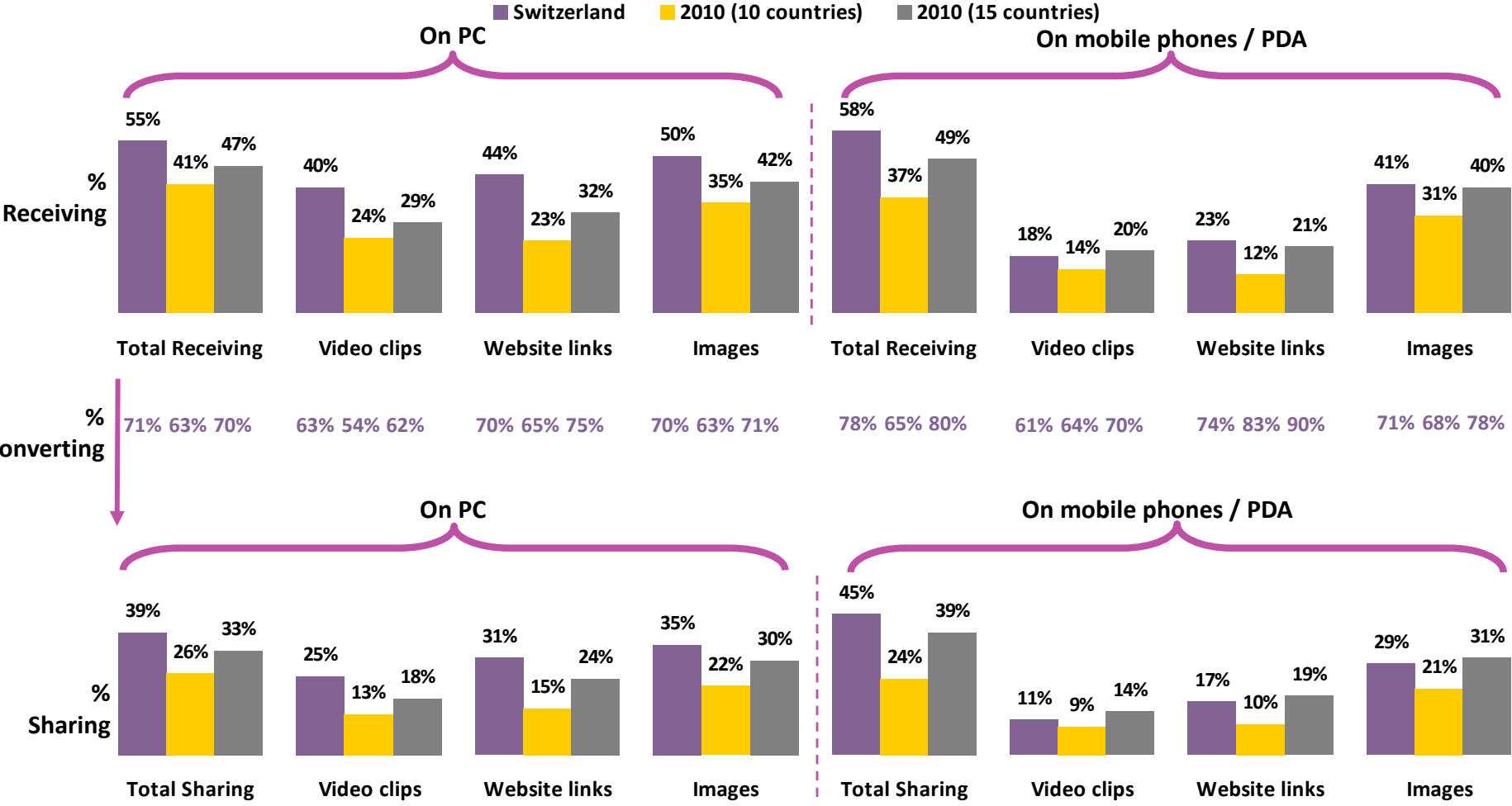
Q20c. Which of the following do you do you feel you have been able to do more of as a result of using the internet?

	 Switzerland	16-24	25-34	35-44	45-54	55+	Male	Female
Keep in touch with friends / relatives	 74%	82%	77%	66%	65%	79%	74%	74%
Book holidays / travel arrangements	 57%	56%	63%	55%	63%	49%	58%	56%
Choose better products or services	 54%	53%	59%	55%	60%	49%	60%	49%
Manage finances	 47%	51%	49%	50%	48%	41%	53%	42%
Access local government information	 44%	48%	41%	43%	45%	45%	51%	39%
Access health information	 17%	7%	18%	17%	20%	24%	14%	21%
Keep up to date with environmental issues	 33%	37%	38%	32%	34%	26%	36%	30%
Follow your favourite brands	 28%	38%	26%	33%	28%	18%	29%	28%
Give to charity	 7%	6%	5%	9%	6%	8%	8%	5%
Better equip yourself for lifestyle changes	 16%	24%	29%	17%	13%	4%	15%	18%
Engage with government or political parties	 14%	19%	12%	15%	14%	11%	19%	10%
Net: Lifestyle management	 86%	89%	87%	84%	90%	80%	89%	83%

[Base: All Switzerland internet users (n=947)]

Sharing / receiving Viral ad campaigns

Q7bi3/4. Video clips, websites or images are often produced in association with a particular product or brand. Have you ever shared / received one of these with friends or family either on your PC/laptop/other computer or via you mobile phone or PDA Device?



[Base: All Switzerland/European 10/15 internet users (n=947/8445/13333)]

[Base: All Switzerland/European 10/15 internet users with internet enabled phone (n=502/4169/7050)]

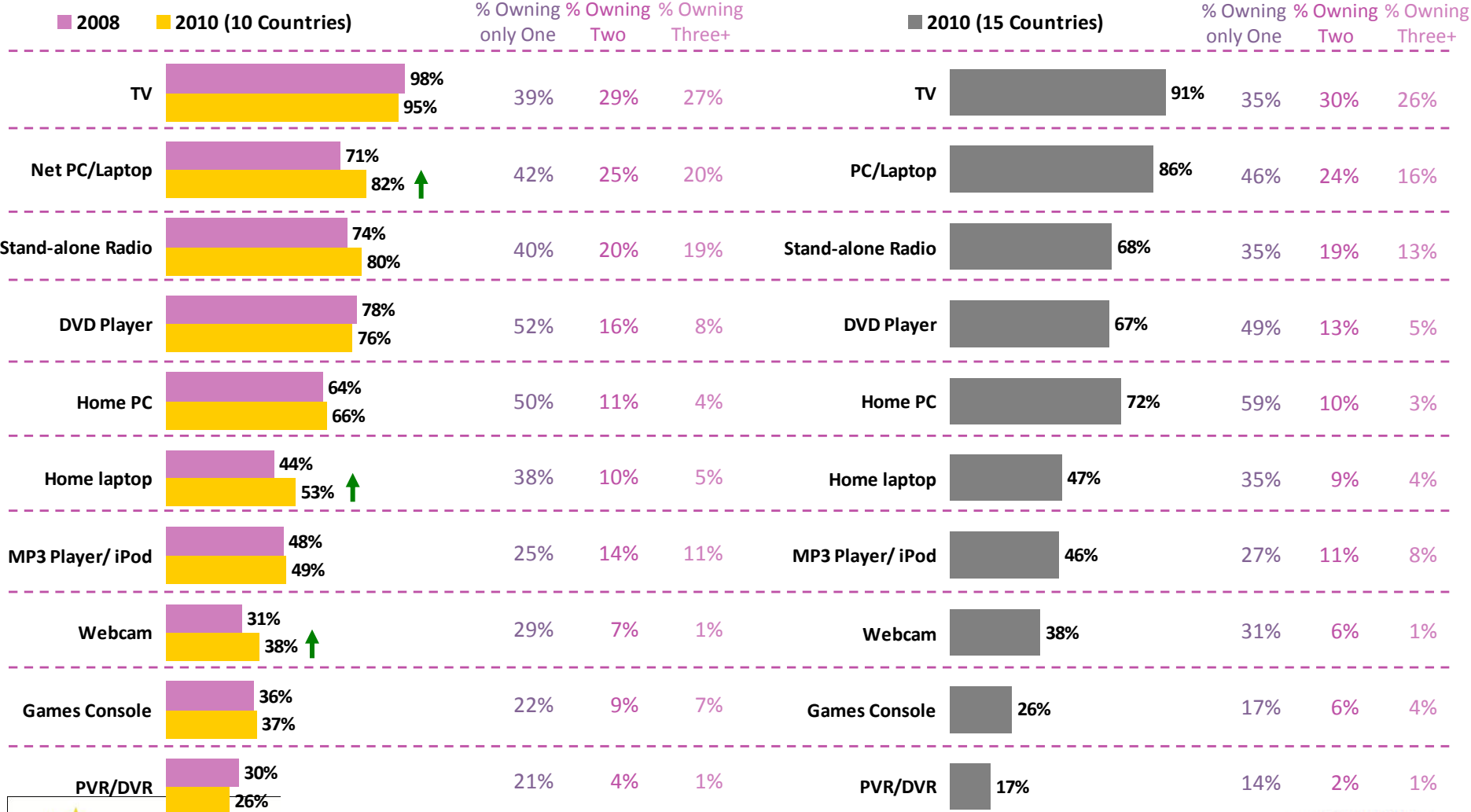
MOBILE PHONE AND TECHNOLOGY USE



Technology products in household

QC6. Which of the following do you have in your household?

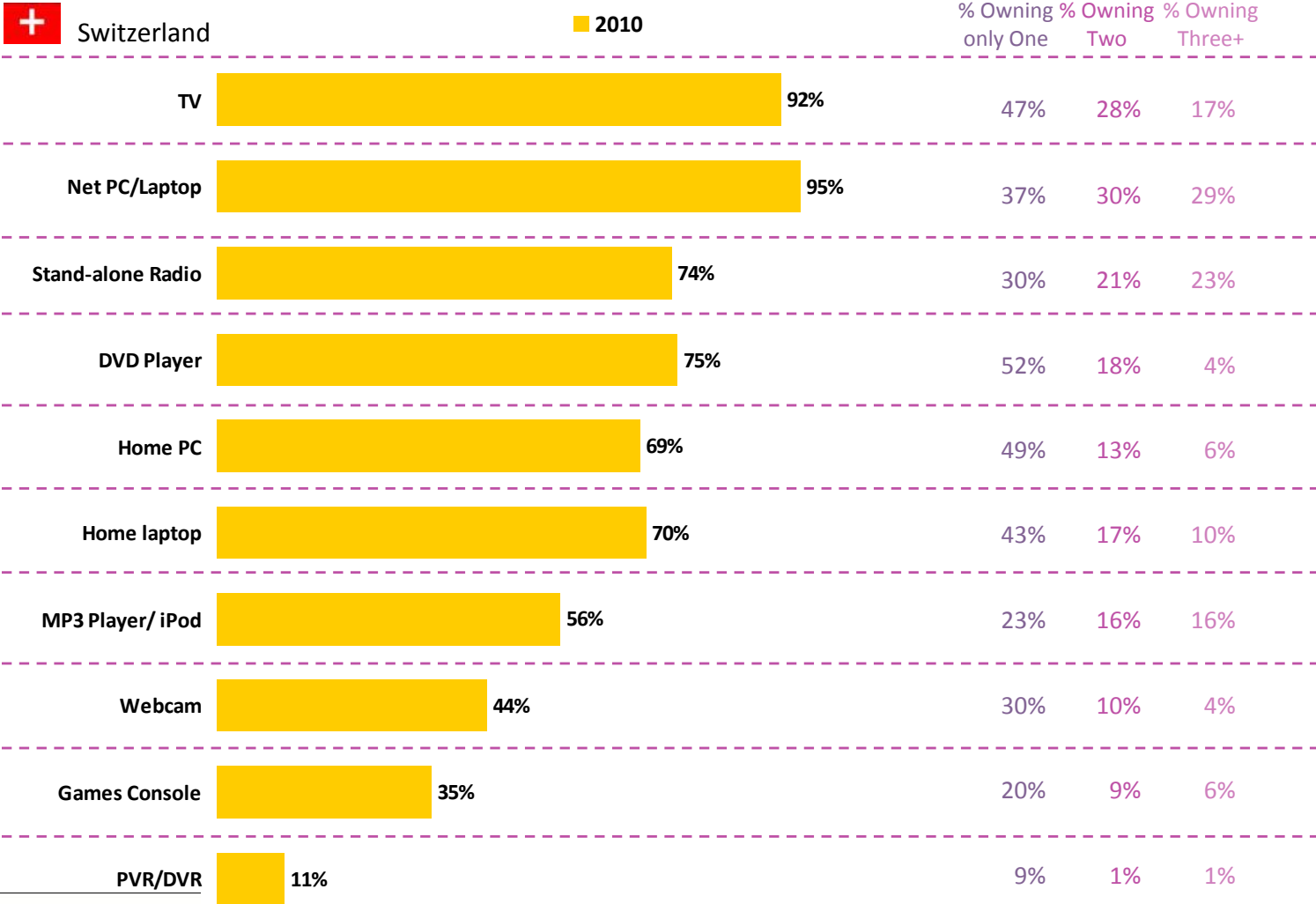
QC6i. How many of following, if any, do you have in your household?



Technology products in household (Switzerland)

QC6. Which of the following do you have in your household?

QC6i. How many of following, if any, do you have in your household?

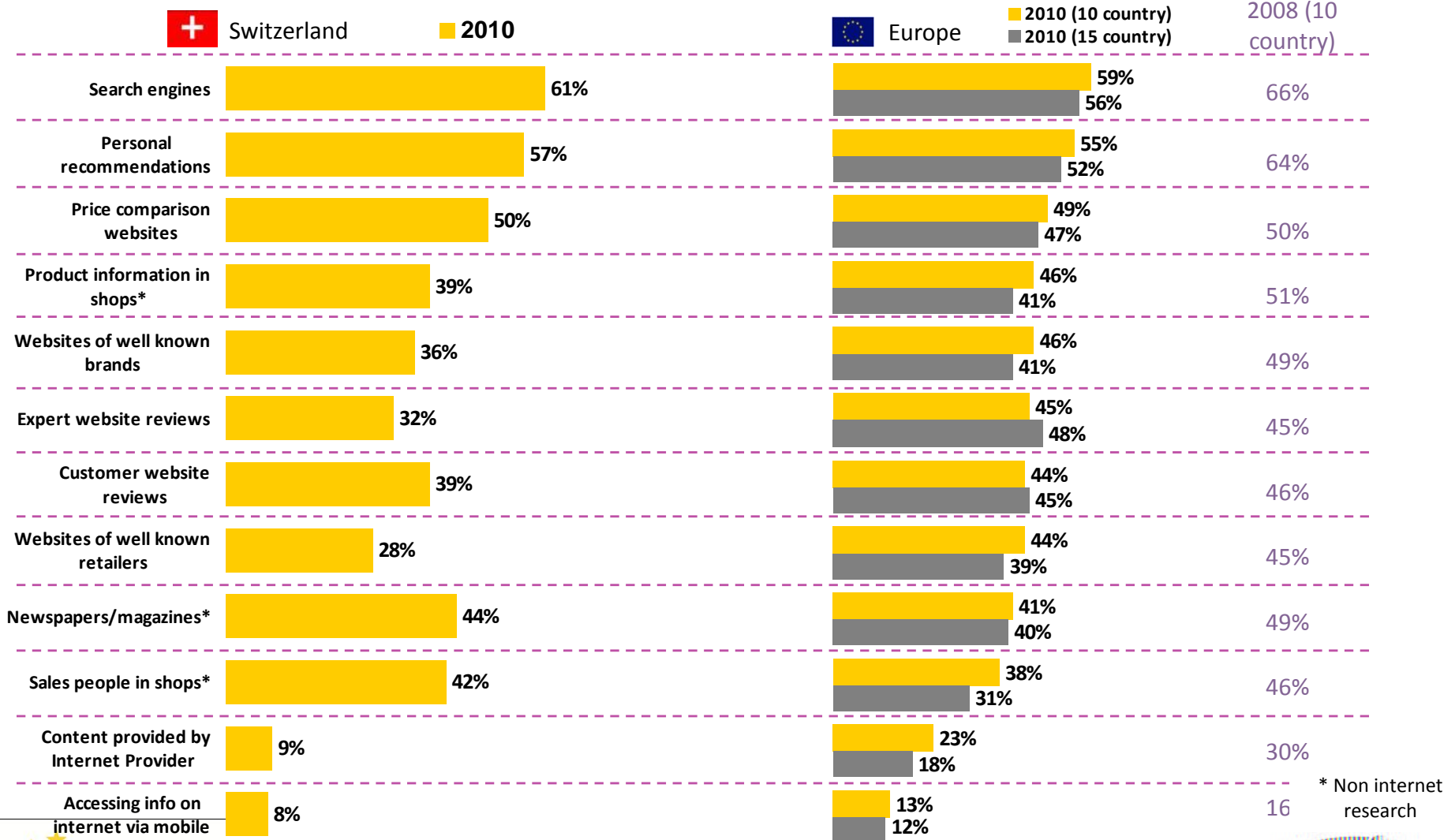


E-COMMERCE



Key sources of information for research

Q5i. Which of the following do you consider to be an important source of information when researching or considering a product or service?



[Base: All Switzerland internet users (n=947)]

[Base: All European 10/15 internet users (n=8446/13333)]

Purchases made / Amount spent online in last 6 months

Q18. In the last six months, how many purchases would you say you have made online?

Q19. In the last six months, approximately how much money would you say you spent in total on all your online purchases?


		MEAN PURCHASES MADE	2008 Mean	2010 Total purchases made (mill)	MEAN AMOUNT SPENT(€)	2008 Mean	2010 Total spent (€ mill)
	UK	19	17	726	1161	1090	36,735
	SWI	16		87	805		4,160
	TK	15		278	623		10,138
	NO	15		48	1086	1085	3,392
	PO	14		238	366		5,282
	DK	13	16	47	774	900	2,643
	SWE	12	15	75	633	729	3,683
	RU	11		470	550		20,045
	EU (15)	11		3,012	655		147,486
	EU (10)	10	9	1,890	722	692	107,039
	GE	9	10	385	662	556	22,763
	PRT	8		37	391		1,539
	NE	8	7	92	470	756	4,710
	BE	8	5	46	521	695	2,497
	FR	7	7	262	670	518	18,555
	IT	6	3	150	474	423	7,668
	SP	4	5	86	538	521	6,204

[Base: All European 10/15 internet users (n=8446/13333)] [Base: All European 10/15 internet shoppers (n=6755/11028)]



Levels of research/purchase online (10)

Q15/Q16/Q17. Have you ever researched/bought online or researched & bought off line any of the following products/services?

	EVER RESEARCHED/BOUGHT ONLINE	2006			2008			2010			RESEARCHED ONLINE BUT BOUGHT OFFLINE
		Conversion	Conversion	Conversion	Conversion	Conversion	Conversion	Conversion			
	Holidays	64	38	47%	50%	59%		Holidays	36		
	Travel tickets	59	44	63%	67%	75%		Travel tickets	31		
	Books	53	39	64%	73%	74%		Books	32		
	Electrical goods	53	32	53%	60%	60%		Electrical goods	37		
	Clothes	47	33	64%	71%	70%		Clothes	30		
	Concert/Festival	45	33	69%	78%	73%		Concert/Festival	22		
	Cars	38	7	15%	16%	18%		Cars	21		
	CDs	36	23	55%	62%	64%		CDs	21		
	Theatre/Cinema	36	24	55%	49%	67%		Theatre/Cinema	22		
	Music downloads	36	19	45%	49%	53%		Music downloads	14		
	Mobile phone	35	15	43%	44%	43%		Mobile phone	22		
	Home furnishings	33	14	37%	37%	42%		Home furnishings	21		
	Insurance	33	18	46%	50%	55%		Insurance	16		
	Properties	32	7	10%	11%	22%		Properties	16		
	DVDs	30	21	64%	70%	70%		DVDs	18		
	Financial products	27	13	36%	40%	48%		Financial products	15		
	Computer games	27	14	49%	55%	52%		Computer games	15		
	Sports equipment	25	13	48%	50%	52%		Sports equipment	16		
	Toys	25	17	63%	72%	68%		Toys	16		
	Toiletries/Cosmetics	21	12	58%	63%	57%		Toiletries/Cosmetics	13		
	Car accessories	21	9	58%	63%	43%		Car accessories	12		
	Food/Grocery	21	11	42%	44%	52%		Food/Grocery	12		
	Health and Beauty	20	11		64%	55%		Health and Beauty	12		
	Designer brands	20	10			50%		Designer brands	11		
	Car hire	18	11	57%	63%	61%		Car hire	8		
	Film downloads	18	7	38%	40%	39%		Film downloads	6		
	Mobile content	15	7	35%	50%	47%		Mobile content	5		
	Any	95	83	82%	87%	87%		Any	82		

[Base: All European 10 internet users (n=8446)]

Levels of research/purchase online (Switzerland)

Q15/Q16/Q17. Have you ever researched/bought online or researched & bought off line any of the following products/services?

+	EVER RESEARCHED/BOUGHT ONLINE		2010	RESEARCHED ONLINE BUT BOUGHT OFFLINE	
			Conversion		
	Holidays	82 64	78%	Holidays	56
	Travel tickets	67 50	75%	Travel tickets	49
	Books	78 71	91%	Books	55
	Electrical goods	66 51	77%	Electrical goods	54
	Clothes	66 58	88%	Clothes	46
	Concert/Festival	67 56	84%	Concert/Festival	41
	Cars	45 9	20%	Cars	29
	CDs	60 50	83%	CDs	40
	Theatre/Cinema	44 32	73%	Theatre/Cinema	33
	Music downloads	54 37	69%	Music downloads	17
	Mobile phone	37 15	41%	Mobile phone	25
	Home furnishings	42 16	38%	Home furnishings	28
	Insurance	51 19	37%	Insurance	32
	Properties	44 12	27%	Properties	20
	DVDs	55 43	78%	DVDs	36
	Financial products	49 24	49%	Financial products	28
	Computer games	47 29	62%	Computer games	27
	Sports equipment	36 21	58%	Sports equipment	24
	Toys	40 29	73%	Toys	28
	Toiletries/Cosmetics	37 24	65%	Toiletries/Cosmetics	26
	Car accessories	25 13	52%	Car accessories	16
	Food/Grocery	49 35	71%	Food/Grocery	35
	Health and Beauty	42 28	67%	Health and Beauty	28
	Designer brands	46 29	63%	Designer brands	34
	Car hire	28 20	71%	Car hire	14
	Film downloads	33 16	48%	Film downloads	9
	Mobile content	33 23	70%	Mobile content	11
	Any	99 96	97%	Any	93

[Base: All Switzerland internet users (n=947)]

Changing mind after researching online

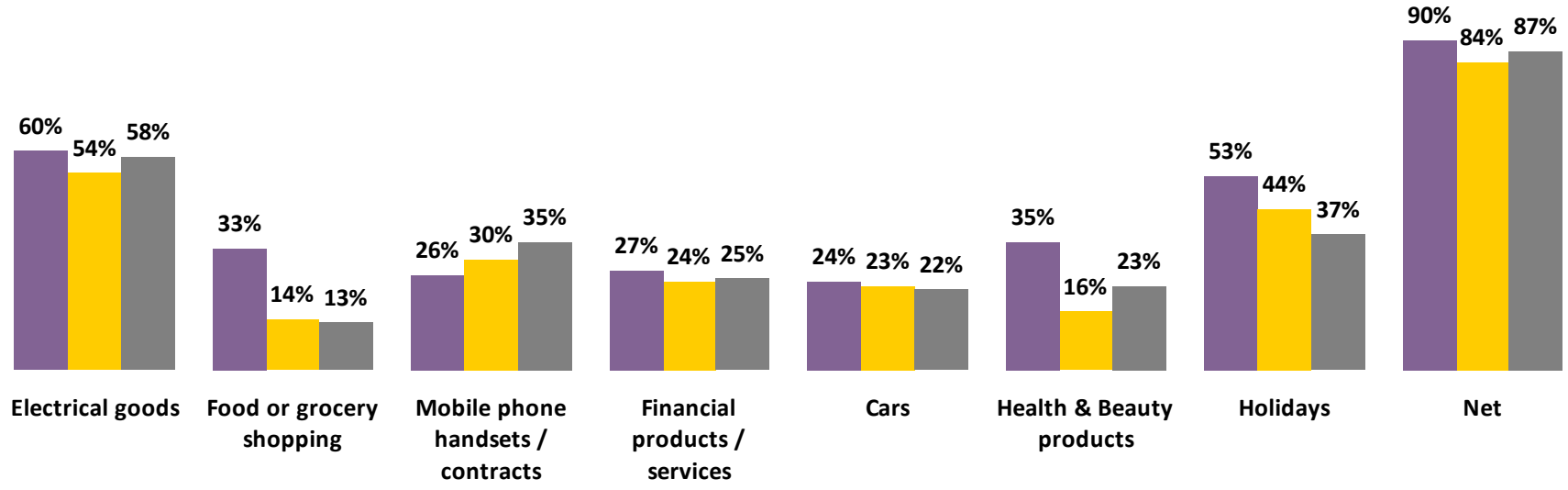
Q17a. Have you ever changed your mind about which particular brand of product to purchase after research on the Internet?
 Q17b. And have you ever changed your mind about which brand to choose when purchasing ... after researching on the internet?

63% of respondents in Switzerland researching on the internet changed their mind about the brand they were about to purchase

44% of respondents (36% in 2008) in Europe (10 countries) researching on the internet changed their mind about the brand they were about to purchase

55% of respondents in Europe (15 countries) researching on the internet changed their mind about the brand they were about to purchase

■ Switzerland ■ 2010 (10 country) ■ 2010 (15 country)



Conclusions from EIAA Mediascope 2010

- 84% of Swiss people use the **Internet** on a weekly basis, one of the highest levels in Europe
- 18% of Swiss people use a mobile device to access the internet
- In terms of **frequency and time** spent the different demographics in Switzerland have a mature profile
- The Swiss are great fans of **media meshing** (60% of TV watchers say they use internet at the same time) – displaying increasing synergy between Internet and other media
- High broadband and **Wireless** is increasing the use of Internet in the home for entertainment, information and commerce purposes
- Use of **news, banking and finance, travel , auction and local information sites** are highest
- **Favourite media and high engagement – internet** is the media people would be lost without.
- **E-commerce** is well developed in Switzerland
- **Online advertising** is well placed to influence the product and purchase decision