

EIAA European Media Consumption Study II

Pan-European Results October 04

Conducted by
Millward Brown



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EIAA Media Consumption Study II



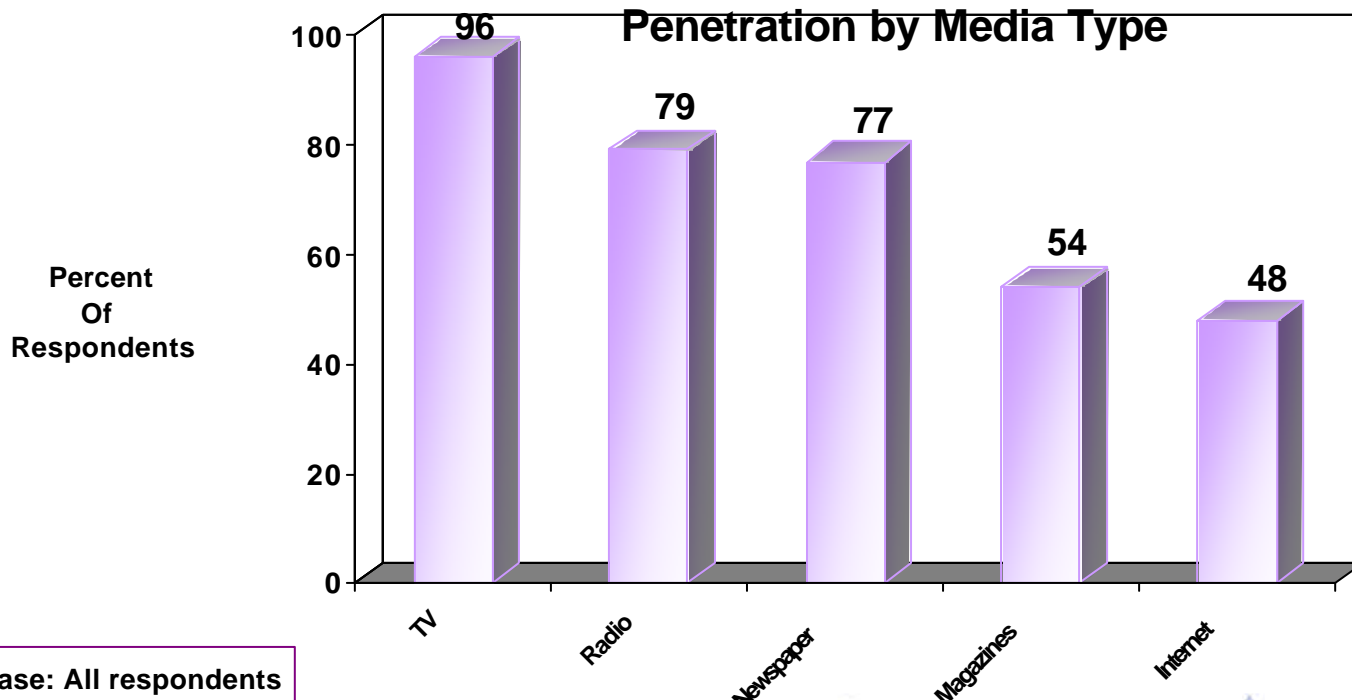
- Annual survey of media consumption patterns across Europe based on consumer attitudinal data
- **Objective:**
 - Measure how consumers allocate their time across media options: TV, Radio, Newspapers, Magazines and the Internet
- **Methodology:**
 - Random telephone interviews
 - Nationally representative sample
 - 1000 respondents per country: UK, FR, DE, ES and IT
 - 500 respondents per country: Belgium, the Netherlands
 - 333 respondents per country: Denmark, Sweden, and Norway
 - Fieldwork completed September to October 2004



Penetration by Media Type

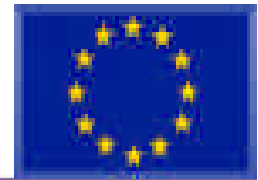


TV remains the media of choice for most consumers with 95% of those studied watching something during a typical week



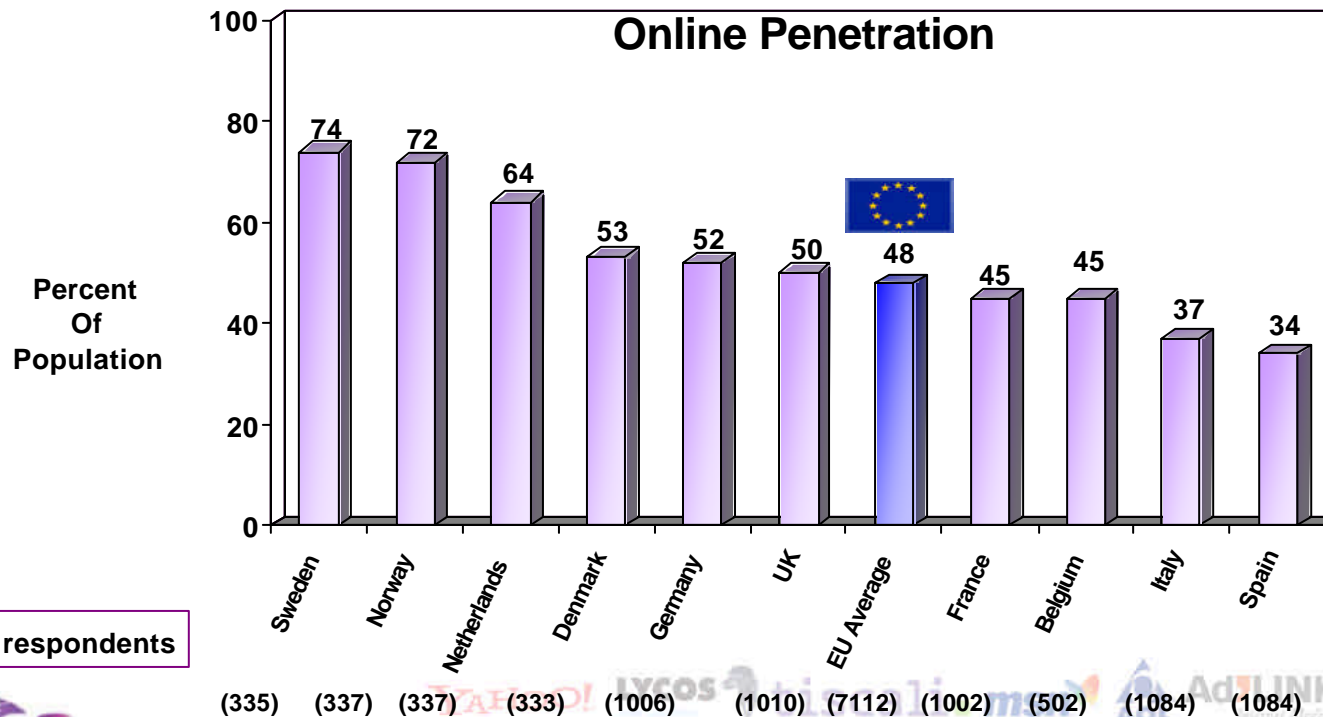
In a typical 5 day week, do you watch TV, read a newspaper or surf the internet? (note Magazines and Radio was during a typical 7 day week)

Internet Penetration



Almost half (48%) of all Europeans are now using the Internet.

Internet penetration ranges from 74% (Sweden) to 34% (Spain)



Base: All respondents

(335) (337) (337) (333) (1006) (1010) (7112) (1002) (502) (1084) (1084)

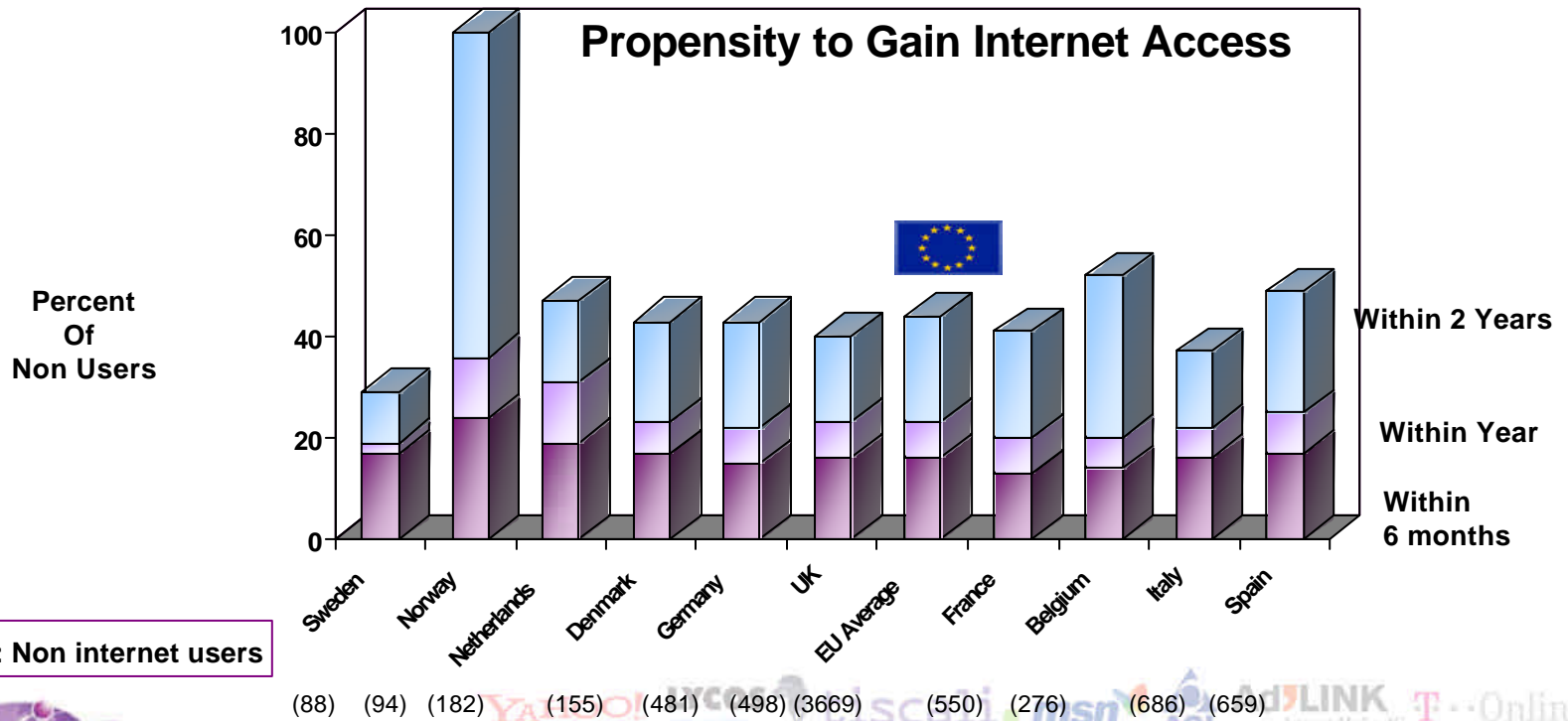
In a typical 5 day week, that is Monday to Friday, do you use the Internet? This can include Email, instant messenger or other online activities? And during a typical weekend?

Penetration Growth



Among those that are not already online, 20% plan to gain access within the next year

All of Norway plans to be online within 2 years

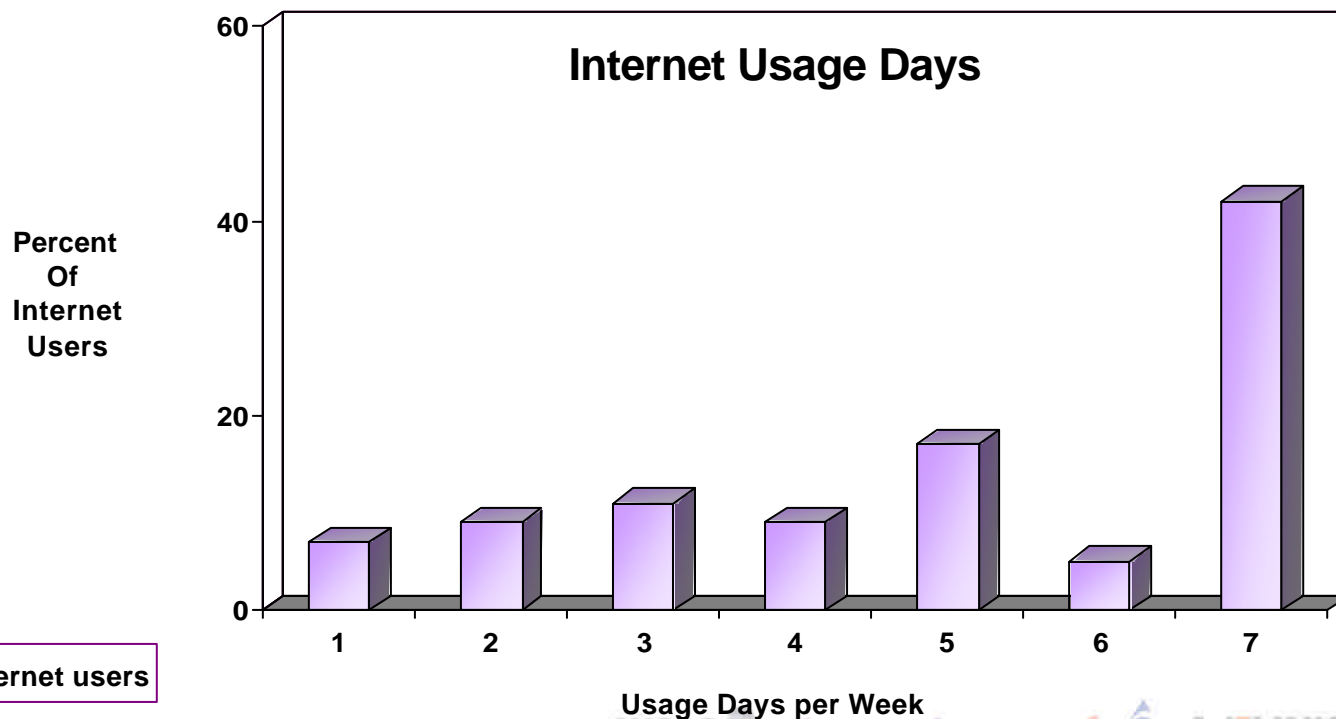


You stated that you currently do not use the internet, do you think you are likely to use it...?

Internet Usage Days



Among those online, 40% claim daily usage



Base: Internet users



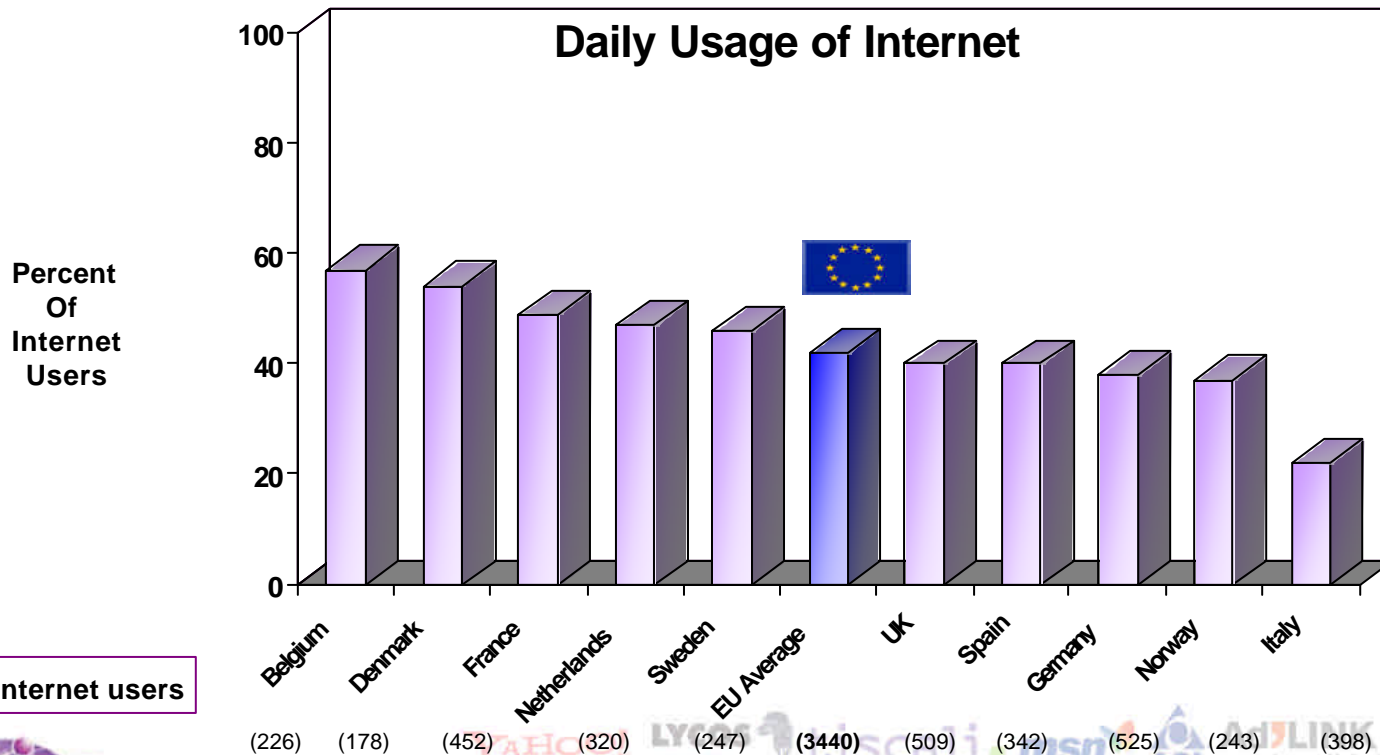
(3440)

You stated you have internet access, during a typical 7 day week how many days do you go online?

Daily Usage by Country



Daily usage is highest in Belgium at 57% of the online population, followed by Denmark and France

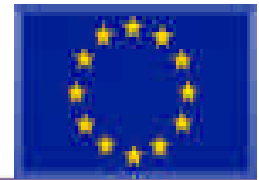


Base: Internet users

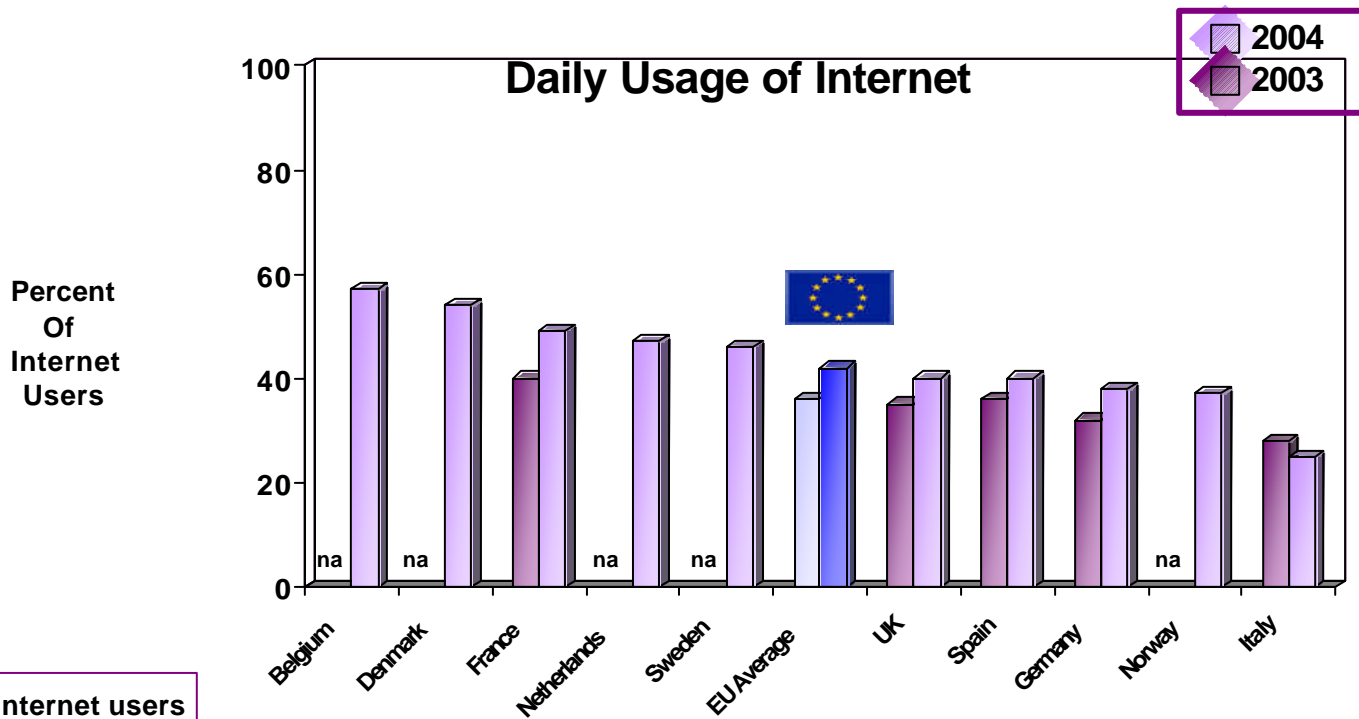


You stated you have internet access, how many days per week do you go online?

Daily Usage by Country



The percent of daily usage has grown (relative to last year) in UK, FR, DE, and ES



Base: Internet users

(226) (178) (452) (320) (247) (3440) (509) (342) (525) (243) (398)

Approximately how many days per week do you use the Internet?

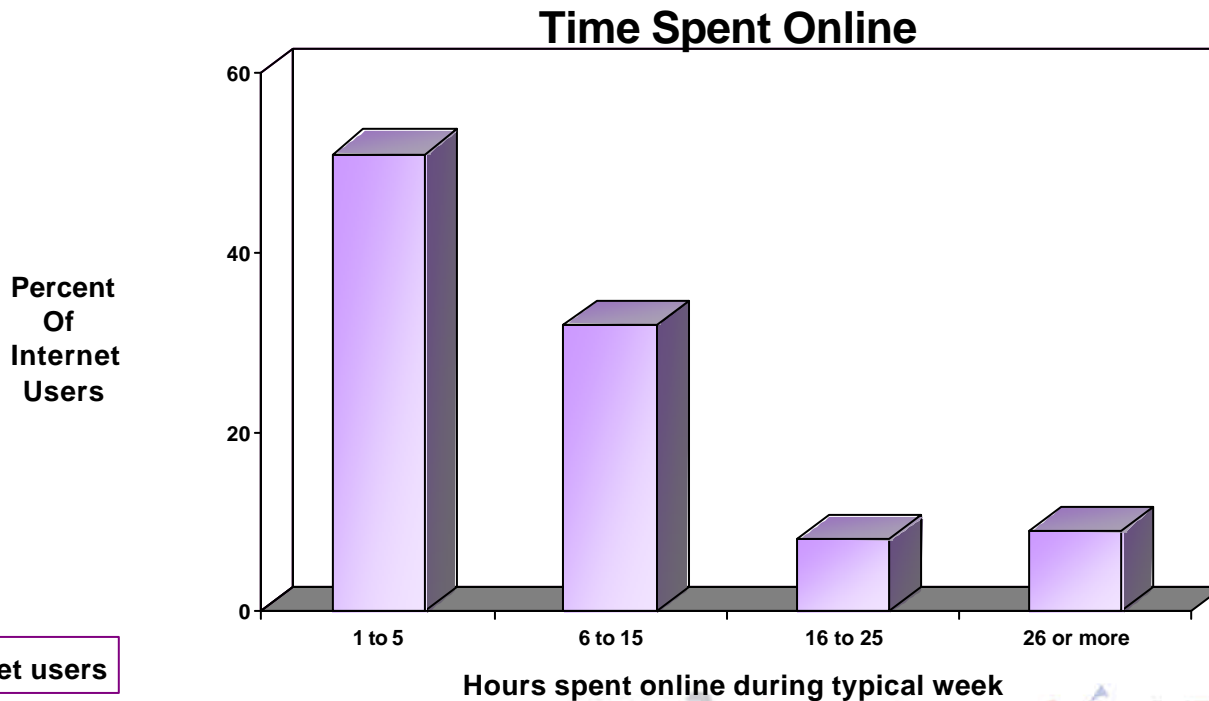


Hours Spent Surfing the Web



Half of those studied use the Internet less than 5 hours per week.

However, one in ten are online more than 26 hours a week



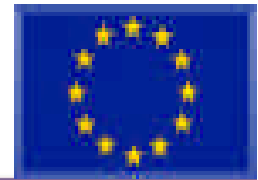
Base: Internet users



(3440)

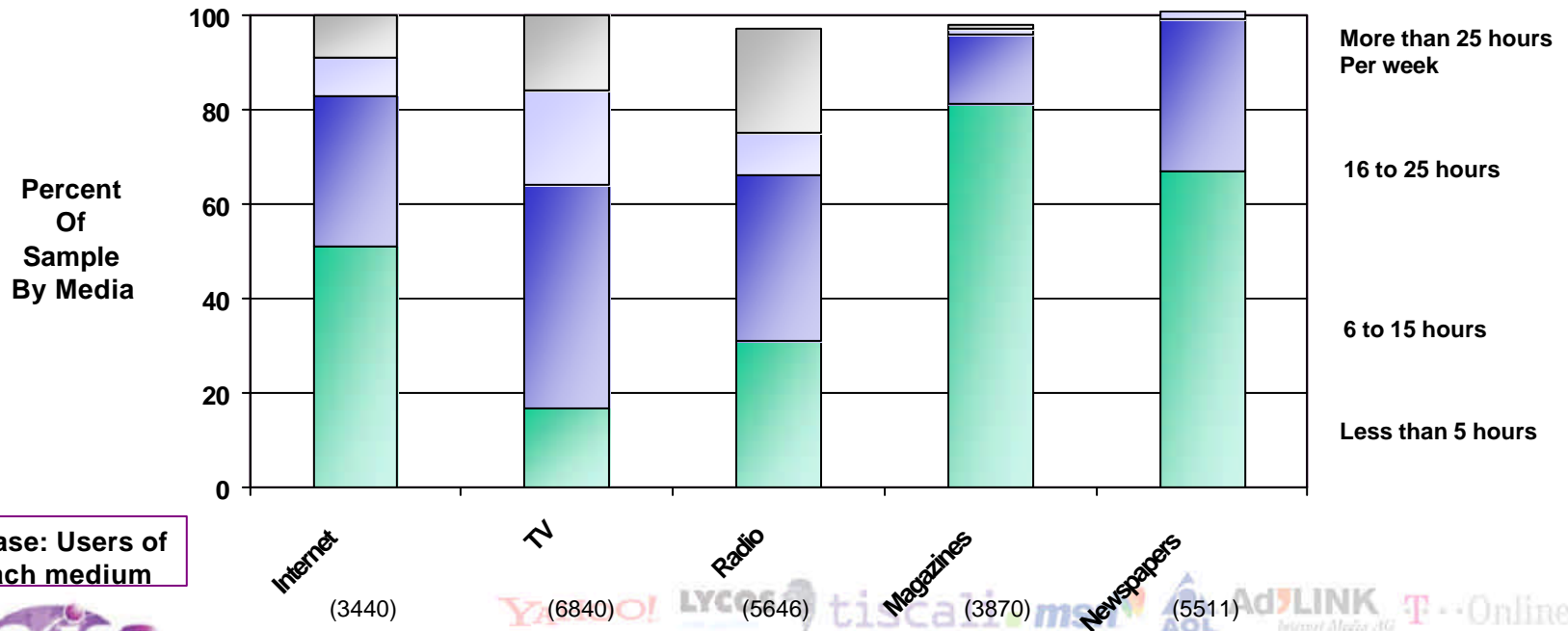
In a typical 7 day week, approximately how many hours do you spend in total using the Internet?

Allocations by Media Type



Print (magazines and newspapers) have the lowest 'involvement' levels with 60% or more of readers spending less than 5 hours per week reading

Time Spent per Week



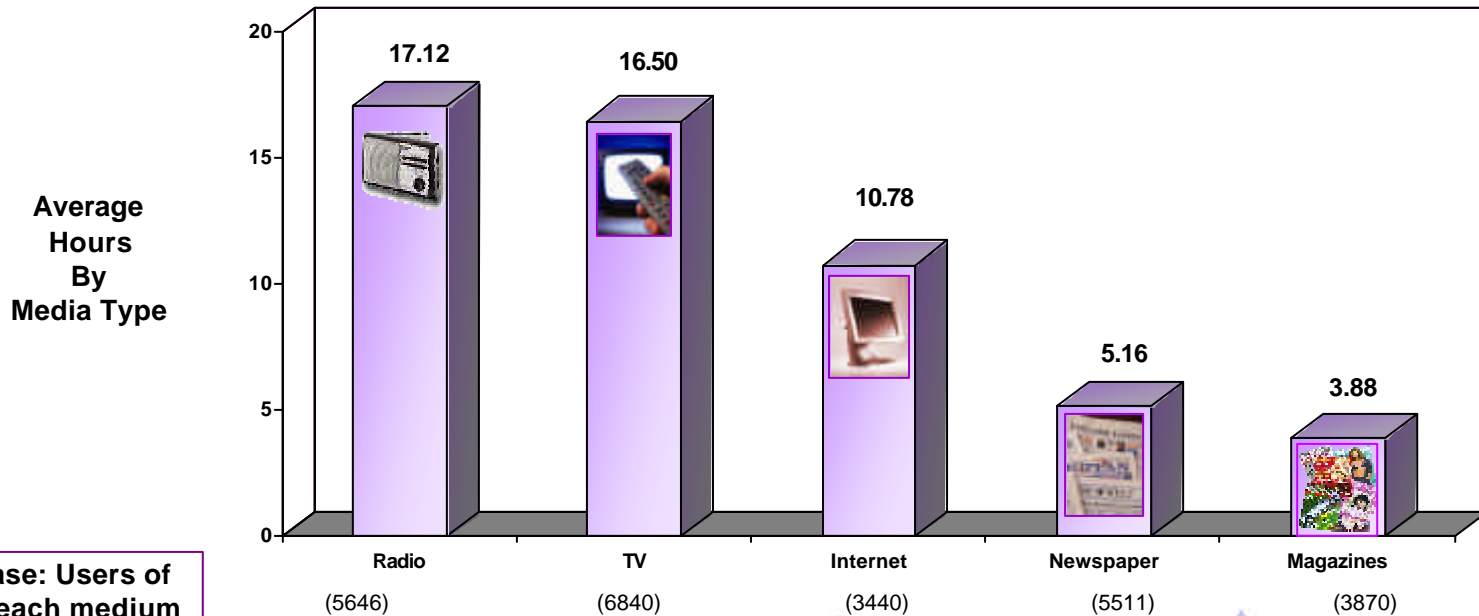
In a typical 7 day week, approximately how many hours do you spend in total using the Internet, TV, Radio, etc?

Time Spent by Media Type



The average internet user spends more than 10 hours online per week

Average Hours Spent by Media Type



Base: Users of each medium

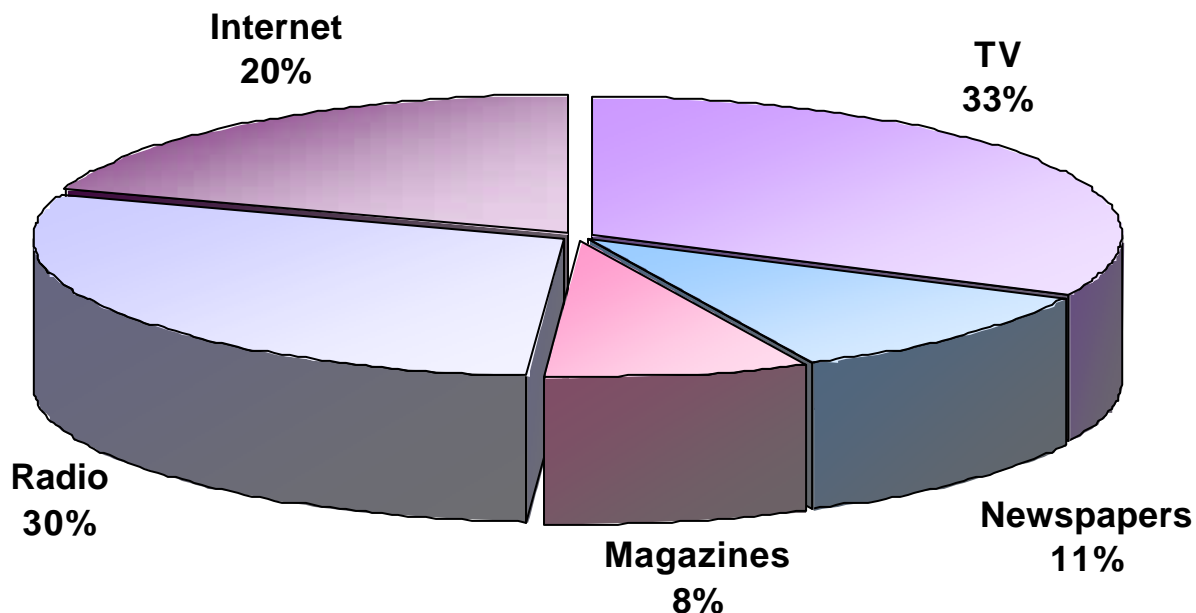


In a typical 7 day week, approximately how many hours do you spend...?

Average Allocation by Media Type



Of all the time Europeans spend consuming media (reading newspapers and magazines, watching TV, listening to radio or surfing the Web) 20% of is allocated to the Internet



Base: Users of each medium



Cost of Increased Internet Usage



One third of Europeans are watching less TV as a result of increased Internet usage

One in four talk on the phone less, read fewer magazines and newspapers

'Cost' of Internet Usage by Activity

Watch TV	35%
Talk on the phone	27
Read Magazines	24
Read Newspapers	24
Read Books	22
Listen to Radio	16
Be Outdoors	15
Listen to Music	15
Exercise	13
Spend time w/Family and Friends	13
Work	10

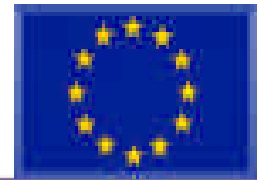
Base: Internet users



(3440)

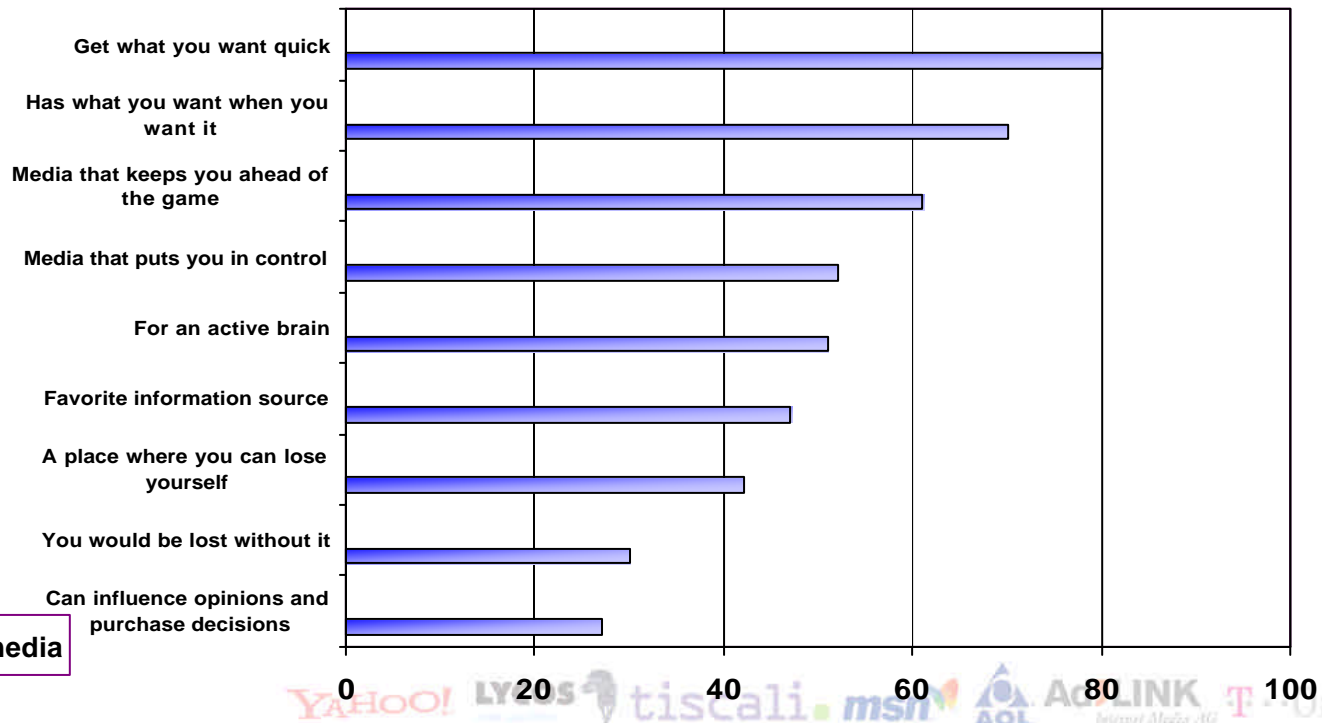
Q20: Which of the following do you do less often as a result of using the Internet?

Strengths of the Internet



The internet's strength is that it gets you what you want quickly and when you need it, with 80% agreeing with that statement

One in four could not live without it.



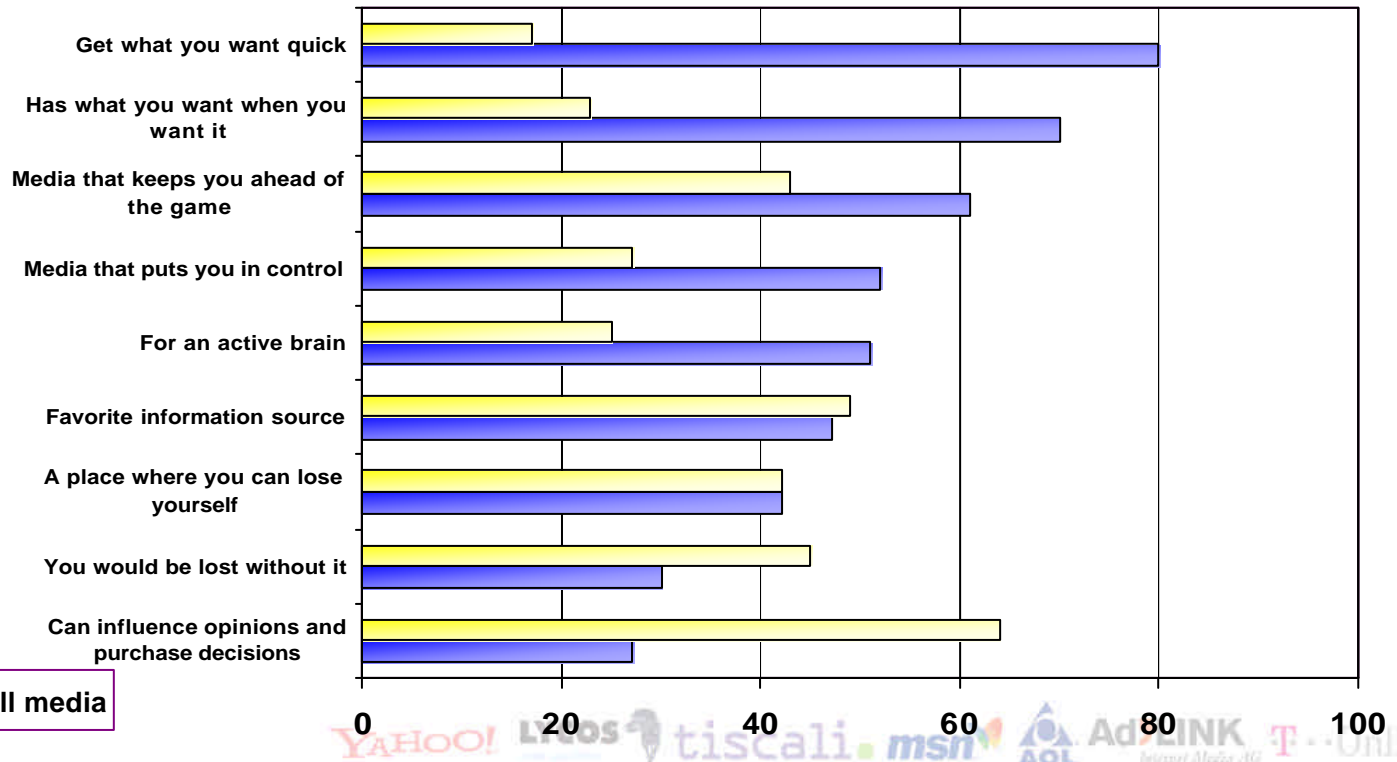
Base: Users of all media



Q: Which of these media do you think...?

(1397)

Internet Strengths vs. TV



Base: Users of all media



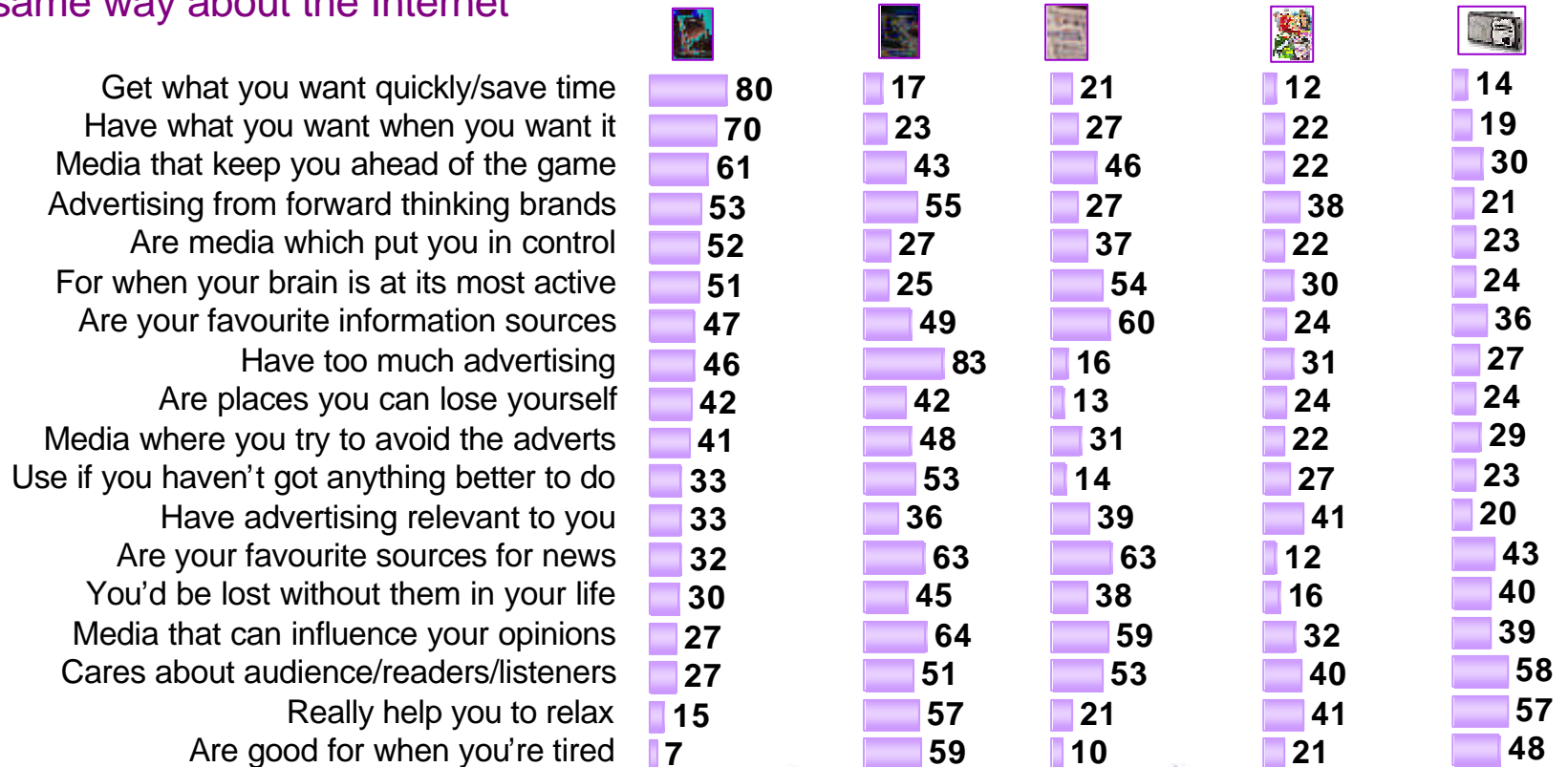
Q: Which of these media do you think...? (1397)



Image of media



Whilst 83% feel that TV has too much advertising, less than half feel the same way about the Internet



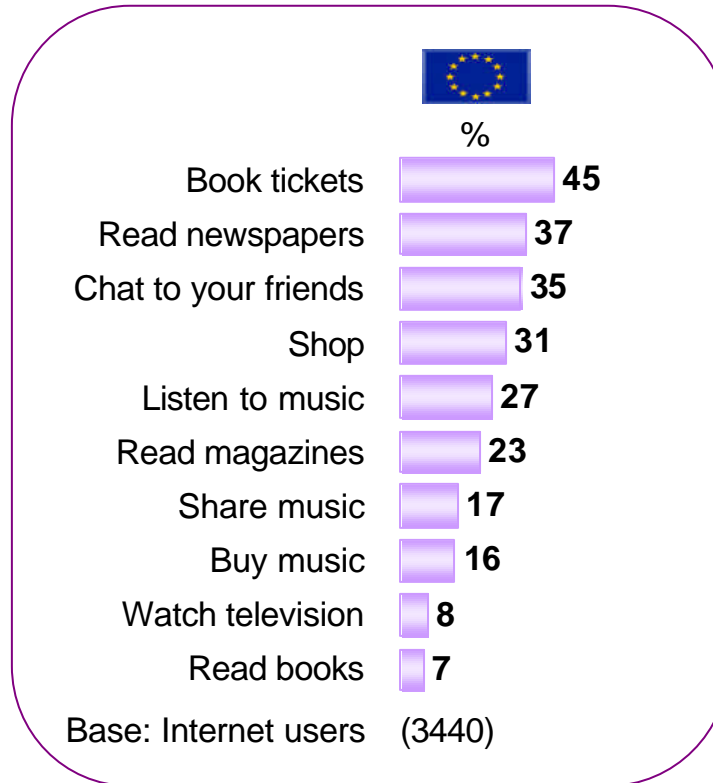
Base: Users of all media (1397) (1397) (1397) (1397) (1397)



Offline to online activities

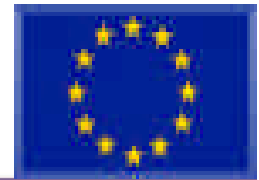


Approximately 2 in 5 internet users now book tickets online around a third chat to friends via the internet

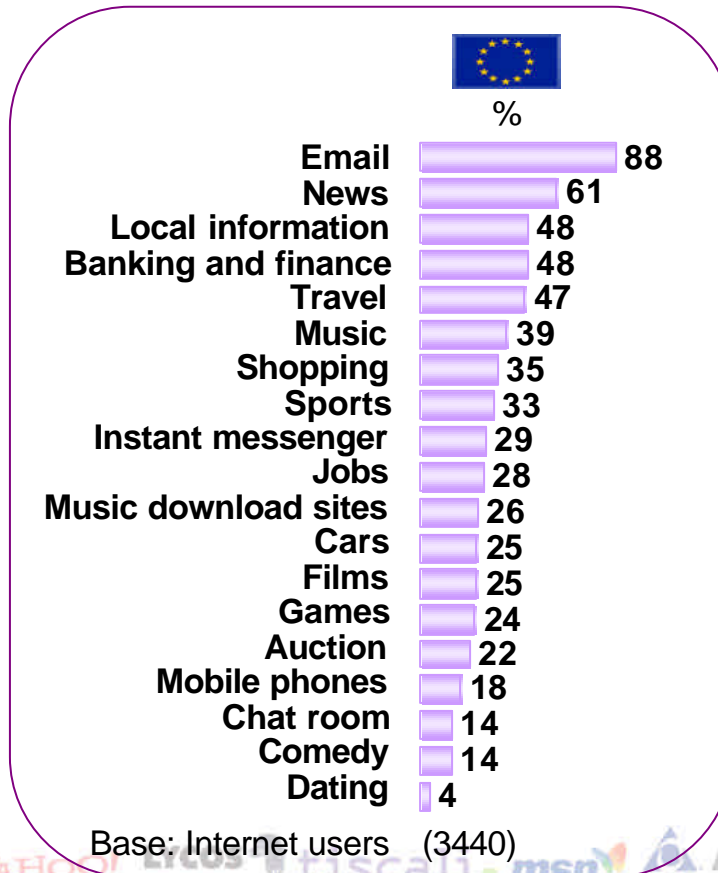


Q21. Which of these things did you previously do elsewhere but now do on the web?

Web site or web pages visited

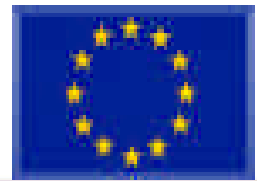


Email remains the most popular/important application with 88% using it. 61% visit news sites and almost half look to organise their finances online

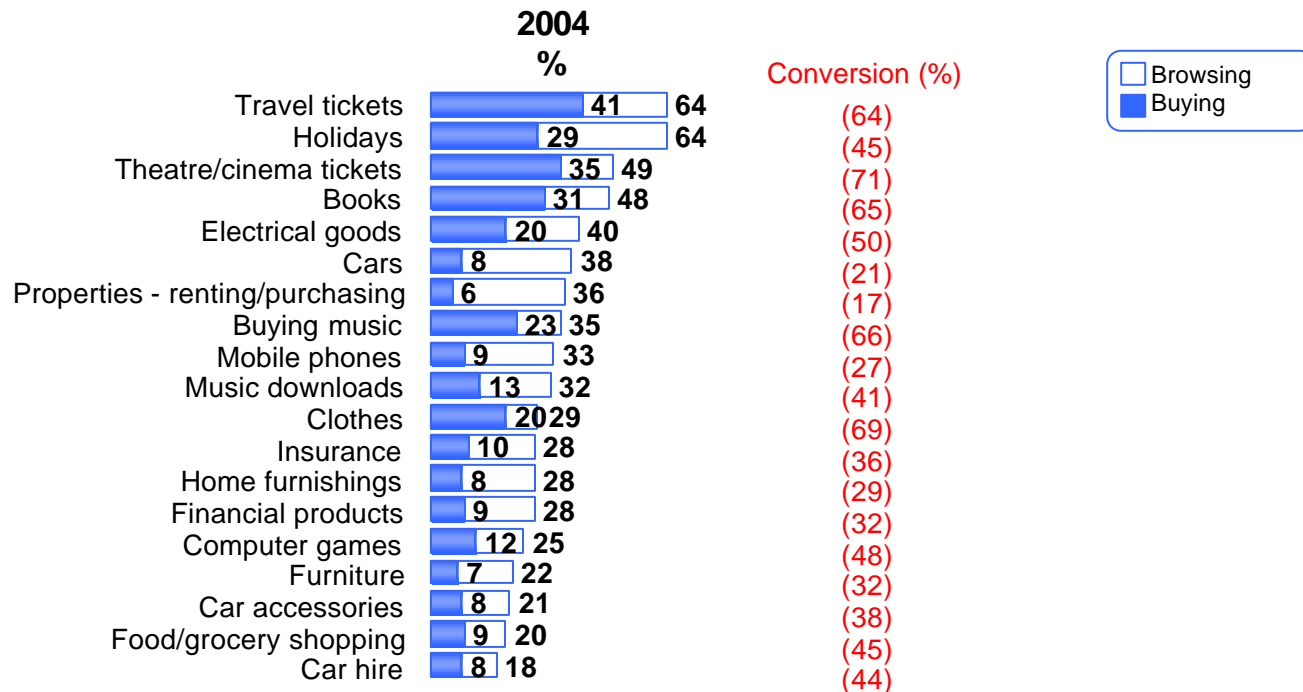


Q16. Which of the following types of website or web pages, if any, do you visit regularly?

Browsing versus Buying



Travel tickets and holiday are the most heavily researched activities/commodities online, two thirds of those researching into tickets online proceed to purchase



Base: Internet Users (3440)



Have you ever researched into...using the internet? Have you ever bought...using the internet?

Pan Europe Conclusions



- Almost half of all Europeans are now using the Internet.
- Internet penetration in the Nordic markets is high, on average two thirds of respondents in these markets have internet access, penetration in the Netherlands is also at similar levels.
- TV remains the most widely used medium during an average 5 day week. Internet however, continues to enjoy strong growth.
- Propensity to get online amongst non users is very positive across all of the markets - although Norway looks the most encouraging with 100% of non users aiming to be online in the next two years.
- Approximately 2 in 5 internet users now book tickets online and around one third chat to friends via the internet
- Primary reasons for preference of using the internet as opposed to other means are that it is faster, offers more choice and is easier and more convenient.

