

EIAA European Mobile Internet Use

Executive Summary

January 2011



About the EIAA European Mobile Internet Use Executive Summary

The **EIAA European Mobile Internet Users Executive Summary** reveals pan-European insights from the 2010 EIAA **Mediascope Europe** study focusing on Europeans who use the internet on their mobile phone or PDA in a typical week.

The EIAA has been conducting the industry standard European piece of cross-media consumer research, Mediascope Europe, since 2003 and it has made a major contribution to the understanding of changing media consumption patterns, the evolving consumer and e-commerce trends.

EIAA Mediascope Europe 2010 covers consumer use of Internet, Radio, TV, Newspapers, Magazines and the latest study includes mobile internet use for the first time. The study clearly demonstrates the growing shift to interactive media across the European markets surveyed.

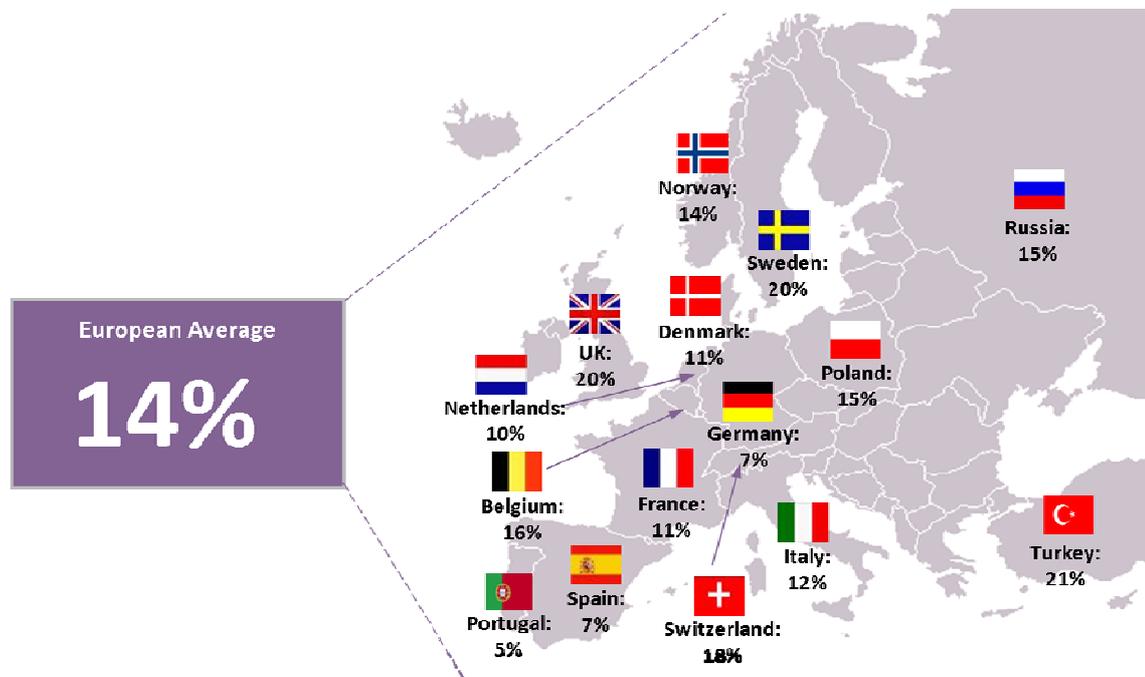
The 2010 Mediascope Europe study was extended to Poland, Portugal, Russia, Switzerland and Turkey in addition to the 10 markets previously covered (UK, Germany, France, Italy, Spain, Belgium, Netherlands, Denmark, Norway, Sweden) to capture the varying ways in which consumers are developing across Europe and assess their similarities and differences.

For more information regarding the full EIAA European Mobile Internet Use Report see page 9.

Internet-on-the-move

14% (71 million) of Europeans use the internet on their mobile phone or PDA in a typical week.

% mobile internet users across Europe



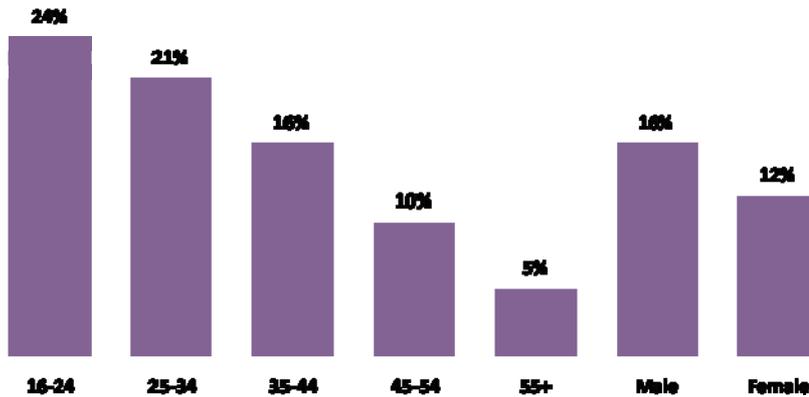
Question: Q1a/2a. In a typical 7 day week, that is Monday to Sunday, can you tell me if you use the internet via a mobile phone or PDA device?

Base: All Europe 15 respondents (n=12554)

With these European mobile internet users spending almost an hour a day online via their mobile (6.4 hours per week), 'internet-on-the-move' is proving a more frequent pastime amongst mobile internet users than reading newspapers (4.6 hours) or magazines (4.2 hours).

It is the younger generation of early adopters that is driving mobile internet use with almost a quarter (24%) of 16-24 year olds and 21% of 25-34 year olds already using the mobile internet, spending 7.2 and 6.6 hours on it respectively online via their mobile phones each week.

% European mobile internet users by demographic



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

Base: All respondents

Consumer reach and time spent online via mobile looks set to continue with improving internet coverage, speeds and services. Marketers would therefore be well advised to recognise how consumers are increasingly engaging with the internet, at more times throughout their day and across a myriad of interactive touch points, and ultimately use this insight to develop effective multi-media marketing strategies.

Extending scope: changing the status quo

The latest Mediascope Europe research extended to Poland, Portugal, Russia, Switzerland and Turkey to capture the different ways in which consumer media habits and behaviours are developing across Europe.

While these markets all display very different characteristics and are at varying stages of internet development, one trend that stands out is the speed of mobile internet growth. Polish mobile internet users (10.3 hours) top the chart regarding which market spends the most time on mobile internet, with Portugal (7.7 hours) and Russia (7.1 hours) also appearing in the top five.

Placing	Country	Hours spent on mobile internet each week amongst mobile internet users
1.	Poland	10.3

2.	Italy	7.9
3. =	Belgium	7.7
3. =	Portugal	7.7
5.	Russia	7.1

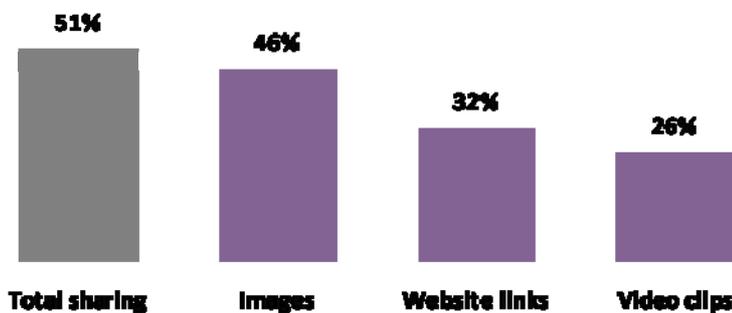
Interestingly, there are more mobile internet users in Turkey compared to those that access internet via their PC or laptop (21% vs. 20%) demonstrating that consumers will engage with new platforms if it makes the internet more accessible for their everyday lives.

Mobile internet as an entertainer and enabler

Mobile internet is a popular source of entertainment with over a quarter of mobile internet users watching (28%) or downloading (27%) films, TV or video clips via their internet enabled mobile phone and with almost a third (31%) of mobile internet users following brands more as a result of the internet (via mobile phone, PDA, PC or laptop), it is clear that the medium is being used for fun and for function signifying that users have high levels of both emotional and rational connection with the medium.

More than half (51%) of mobile internet users claim to share video clips, websites or images with friends or family via their internet enabled mobile phone. This suggests that those online via their mobile are both technologically sophisticated and deeply engaged - highlighting a prime opportunity for marketers to build brand awareness and peer recommendations.

% European mobile internet users sharing images, video clips of website links

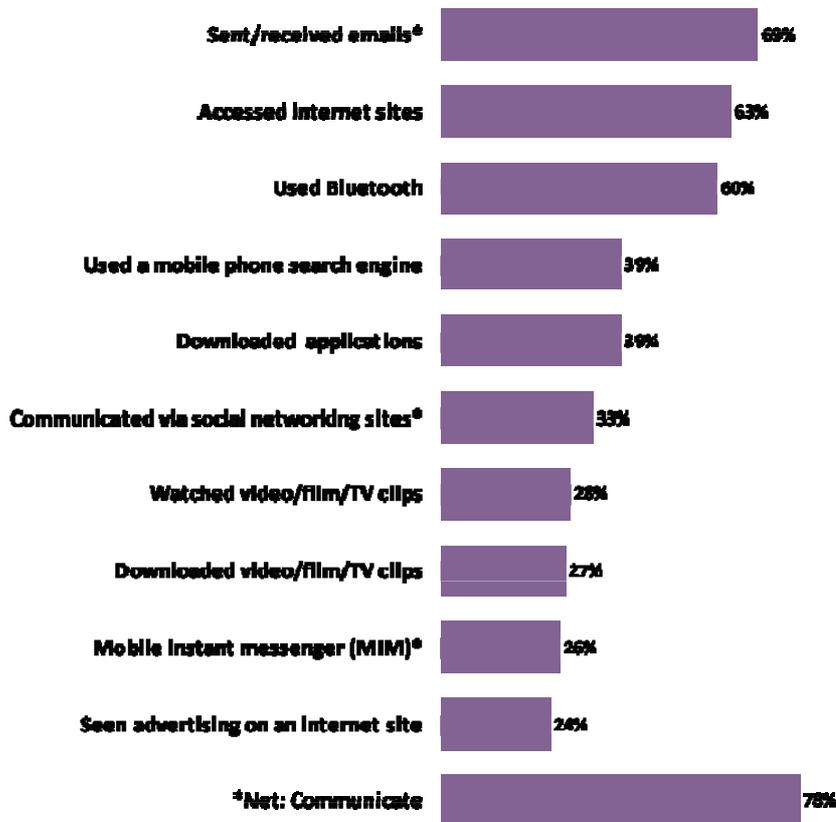


Question: Q7bi4. Video clips, websites or images are often produced in association with a particular product or brand. Have you ever shared one of these via you mobile phone or PDA Device?

Base: All mobile internet users using internet enabled mobile phones

Additionally, 'Word of Web' plays a central role in mobile communications with 78% of mobile internet users communicating via their internet enabled mobile phones with other methods aside from verbal conversation – 69% send and receive emails, 33% state they communicate using social media via their mobile and 26% use mobile instant messenger. Advertisers can therefore benefit from the growing consumer appetite for constant updates and entertainment on the go and use this insight to plan for multi-media campaigns that engage with consumers across a number of platforms.

% European mobile internet users performing mobile activities



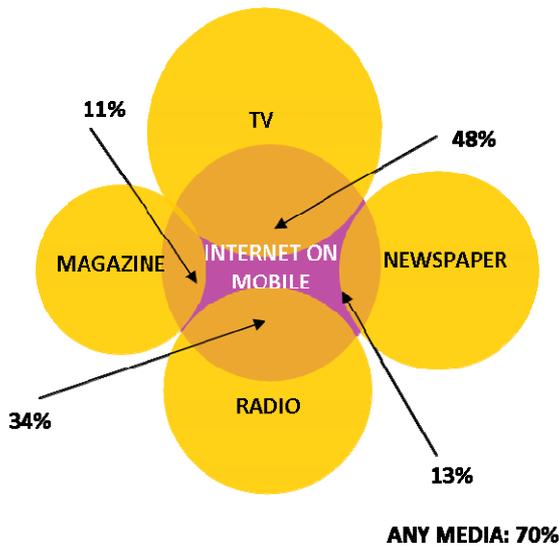
Q7d. In addition to making phone calls or sending text messages, which of the following activities have you undertaken using your mobile phone/iPhone/PDA/Blackberry?

Base: All mobile internet users using internet enabled mobile phones

Converging media experiences

Media convergence is on the rise with the research revealing that 70% of mobile internet users use at least one other media whilst surfing the internet on the mobile phone with 48% watching TV.

% European mobile internet users receiving images, video clips of website links



Q5b-g. When you're mainly using the internet on your mobile which other media do you sometimes use?
 Base: All mobile internet users

With recent technological advancements such as the iPad, and given almost half (48%) of all Europeans own an internet enabled mobile phone, increased mobility and convergence seems inevitable. Marketers should no longer look at media in isolation but rather embrace the media-meshing trend and the wealth and diversity of advertising opportunity it affords.

Alison Fennah, Executive Director of the EIAA said: *“Better devices and connectivity as well as enhanced consumer motivation all started coming together in 2010 to improve and extend the overall online experience. As a result, the internet is now being consumed across PC, laptop, mobile and gaming devices, providing 24-7 access to digital information and entertainment. This presents a compelling case for brands to explore and incorporate a growing number of complementary interactive platforms into the marketing mix.*

“Indeed, new age patterns of media consumption indicate that marketers should be looking to develop multi-platform strategies that reach and connect with consumers more effectively and increase ROI. This is opposed to making media decisions based on an ‘either or’ basis if they want to reach all demographics.”

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About the European Interactive Advertising Association (EIAA)

The European Interactive Advertising Association (www.eiaa.net) represents the leading European interactive media companies across Europe.

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.

Since its founding in 2002 the EIAA has invested substantially in pan-European multimedia research, marketing, standardisation activities and education, of both the market and government, on the role of interactive advertising.

This wide-ranging programme, the senior industry representatives on our board and the committed teams of experts in our working groups all contribute towards the EIAA's deep insight into consumers and markets across Europe and an influential position in the European media community.

EIAA members are currently Adconion Media Group, AOL Advertising Europe, BBC.com, Disney, eBay International Advertising, Hi-media Group, LinkedIn, Microsoft Advertising, MTV Networks International, Orange Advertising Network, smartclip, Specific Media, Vodafone and Yahoo! Europe. The EIAA is chaired by Michael Kleindl, Managing Partner of Valkiria Network.

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With these member networks reaching the majority of the European online audience, the EIAA is in a unique position to work with advertisers and agencies to realise the full potential of interactive media in any marketing strategy.

The full 44 slide EIAA European Mobile Internet Use Report is available at €800 including both pan-European and local market* data and focusing on mobile internet penetration; mobile activities *such as video, social networking, instant messenger and email*; offline media habits and e-commerce behaviour of European mobile internet users.

For more information and to purchase the report contact:

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* Local markets included in the full EIAA European Mobile Internet Use Report are the UK, the Netherlands, Denmark, Sweden, Norway, Poland, Russia, Switzerland, Turkey