

MCDC

Marketers & Consumers
Digital & Connected

European Overview

EUROPEANS ON THE WEB – A GOLDMINE

- Wealth of information on European consumers online
- Engagement, activities and attitudes
- An online survey of 32,000 internet users
- Covers 16 European countries
- Data available by country and by demographic
- Produced with our research partner, InSites Consulting

A NOTE ON METHODOLOGY

- pan-European online survey in 16 countries conducted in June 2009
- Participants recruited from InSites TalkToChangeonline research community.
- The online sample was drawn on a country level of 2000 respondents, consisting of 4 thematic subsamples of 500 respondents.
- More than 32.000 Internet users participated in this survey.
- Sample is representative of online country population (15+).

COUNTRIES INCLUDED IN MCDC:

○ Northern Europe

- Denmark
- Finland
- Norway
- Sweden

○ Eastern Europe

- Hungary
- Poland
- Romania

○ Southern Europe

- Greece
- Italy
- Spain

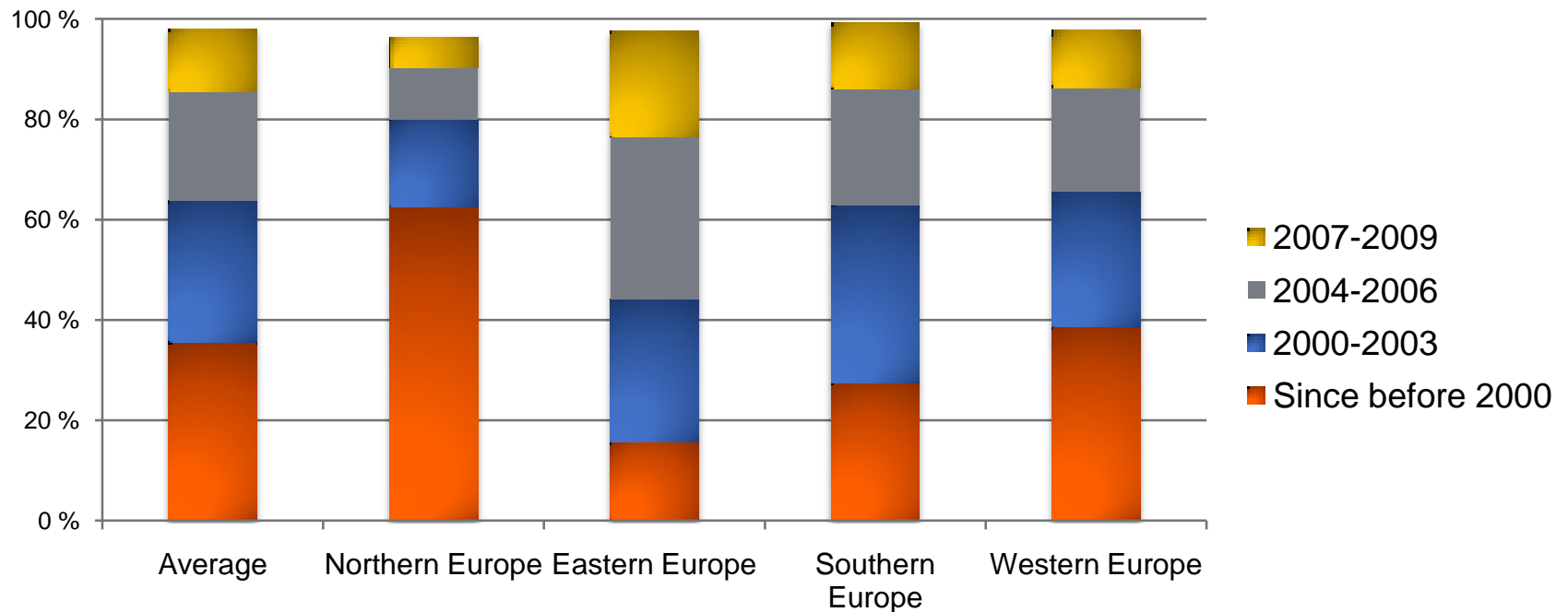
○ Western Europe

- Belgium
- France
- Germany
- Netherlands
- Switzerland
- UK

Overview of European Internet Usage

ESTABLISHED IN THE MEDIA MIX

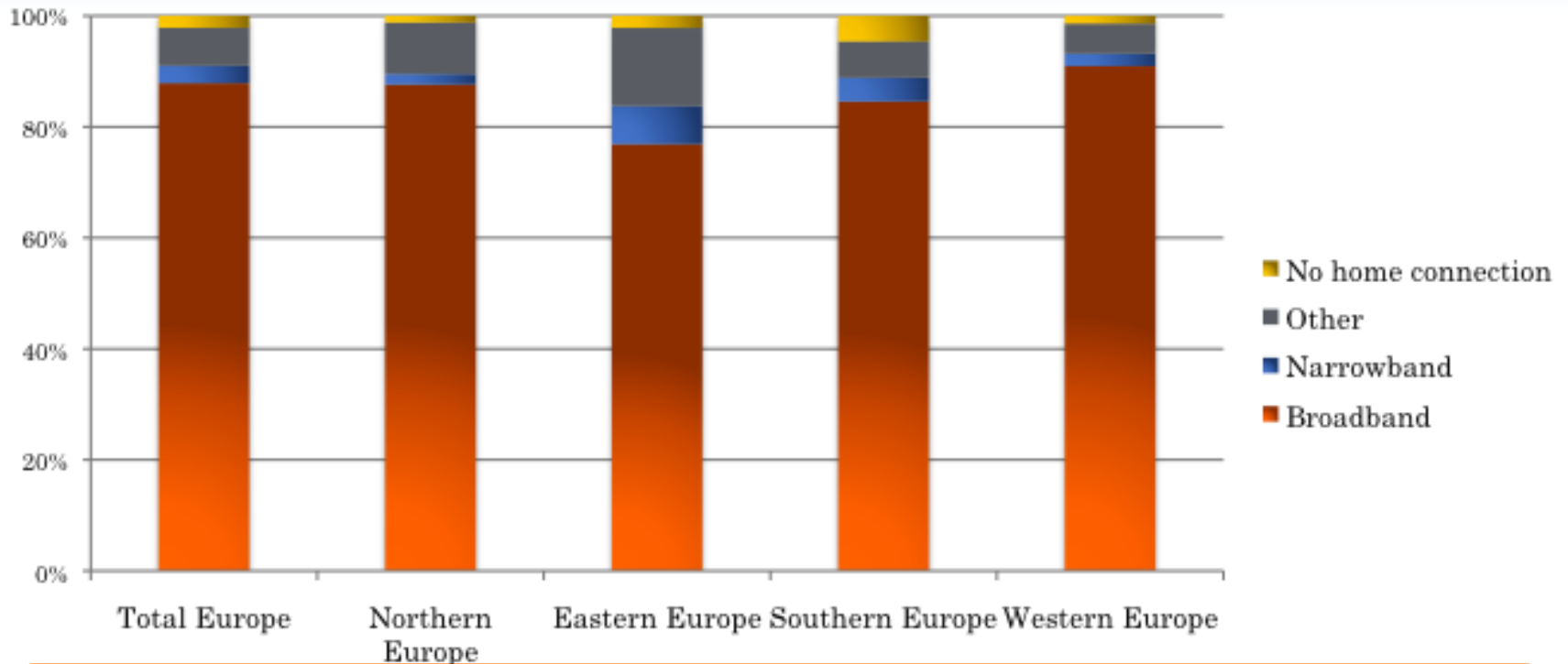
Internet use is established throughout Europe, with 85% of internet users having been active since 2006 or earlier



How long have you been active on the internet?

TECH SPEC – INTERNET SPEED

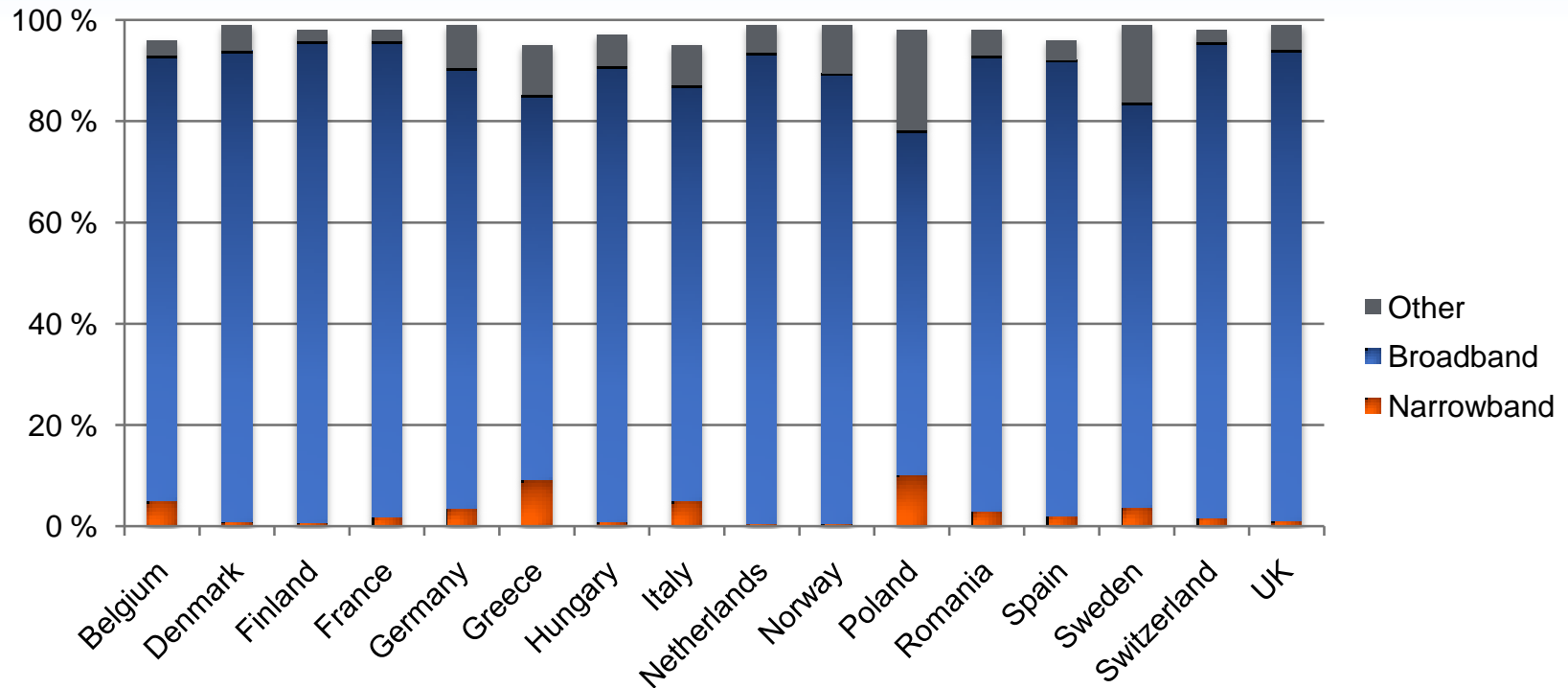
Home broadband connection is the norm all over Europe



Do you have an internet connection at home? If so, what type of connection do you have?

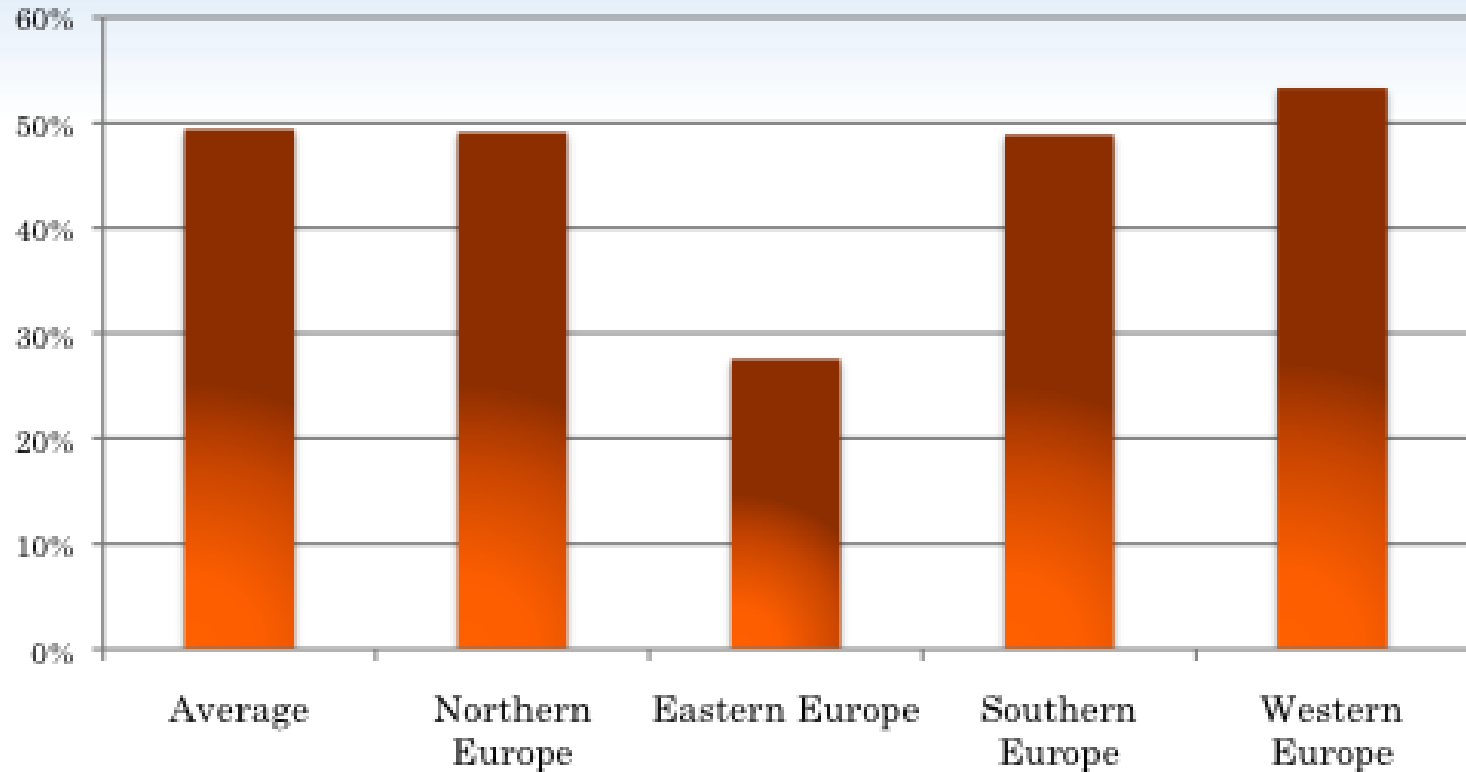
TECH SPEC – INTERNET SPEED BY COUNTRY

Europe wide broadband is dominant with only a small minority using narrowband in any country



Do you have an internet connection at home? If so, which type of connection do you have?

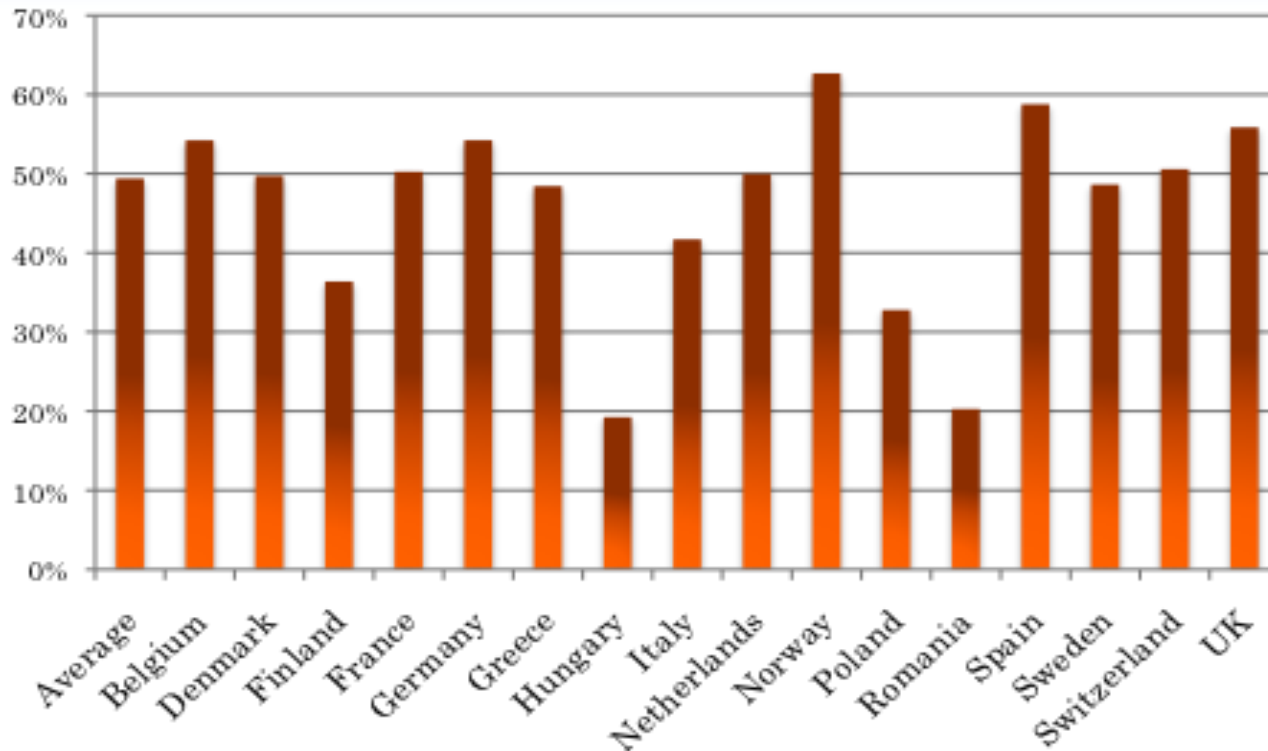
TECH SPEC – WIRELESS CONNECTION BY REGION



Do you use a wireless Internet connection (Wi-Fi) at home? (WiMAX/3G excluded)

TECH SPEC – WIRELESS CONNECTION BY COUNTRY

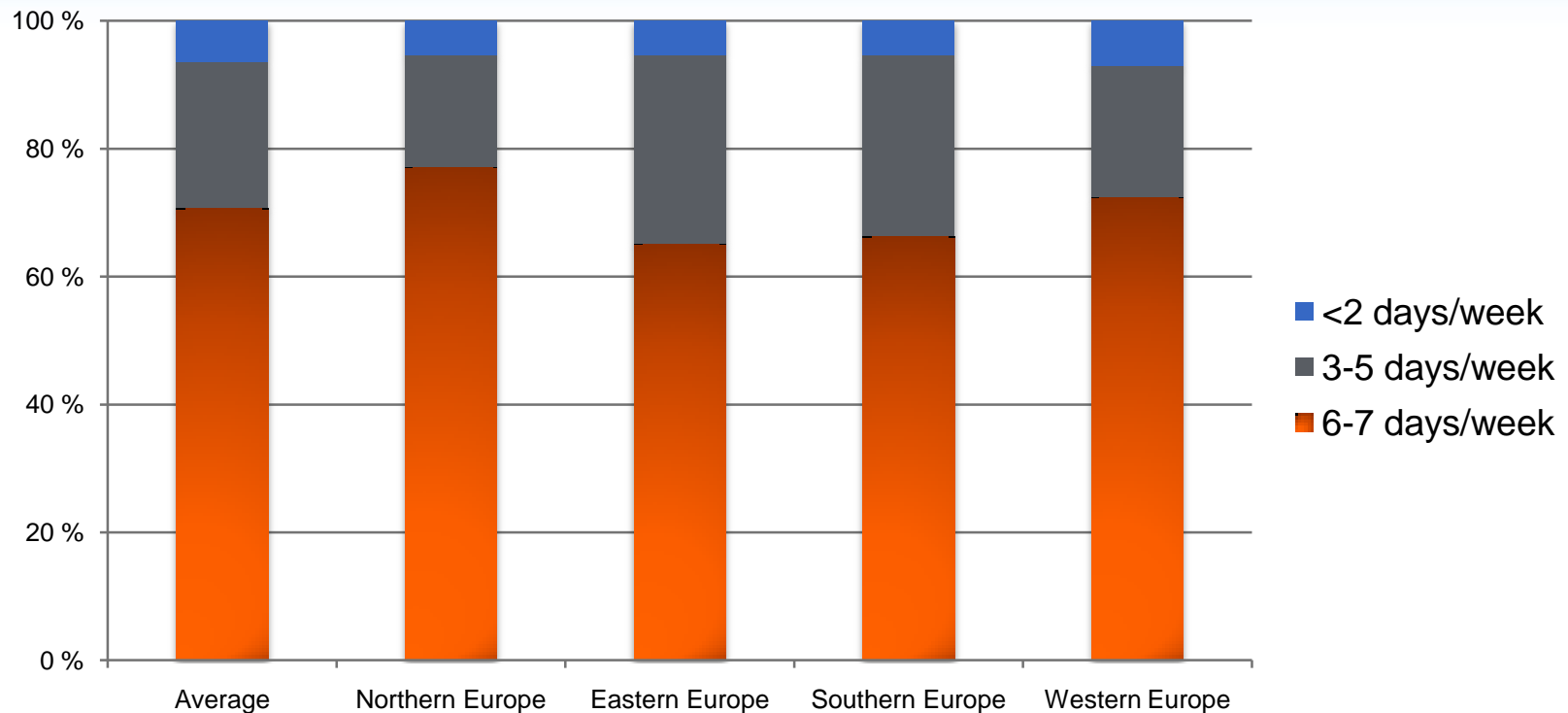
Use of wireless technology varies widely - from 19% of home connections in Hungary to 63% in Norway



Do you use a wireless Internet connection (Wi-Fi) at home? (WiMAX/3G excluded)

TIME ONLINE - FREQUENCY

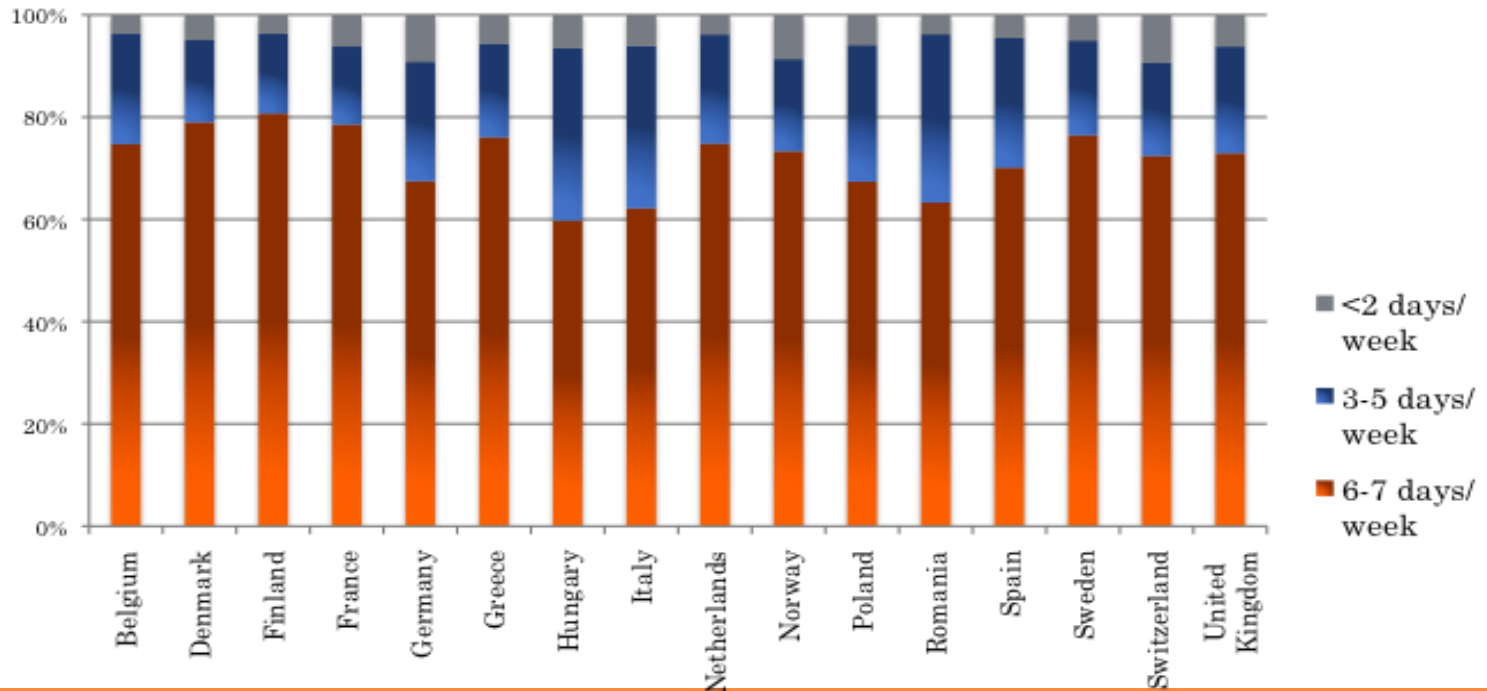
Over two thirds of European internet users go online almost every day of the week



How many days a week do you use the Internet in an average week?

TIME ONLINE - FREQUENCY

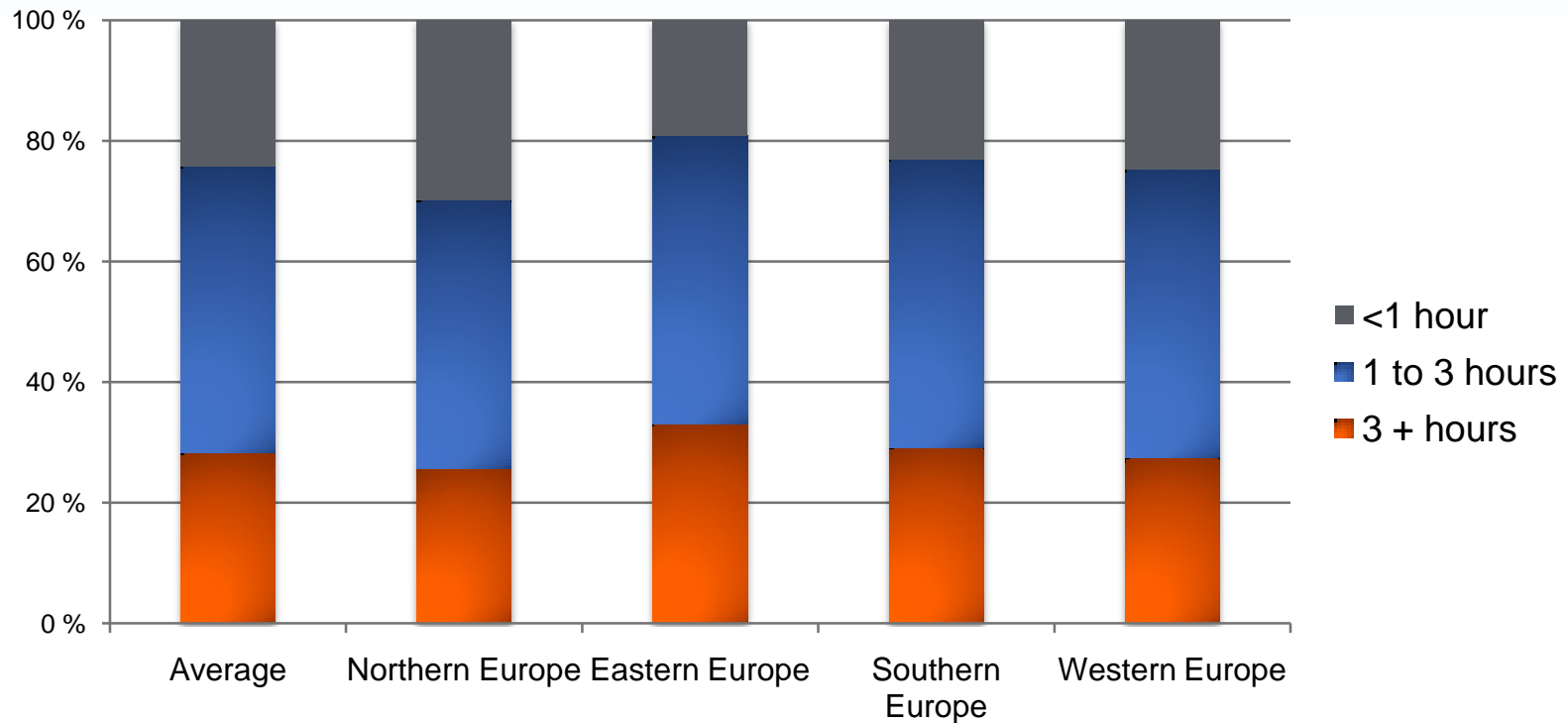
Shows stability across Europe



How many days a week do you use the Internet in an average week?

TIME ONLINE - DURATION

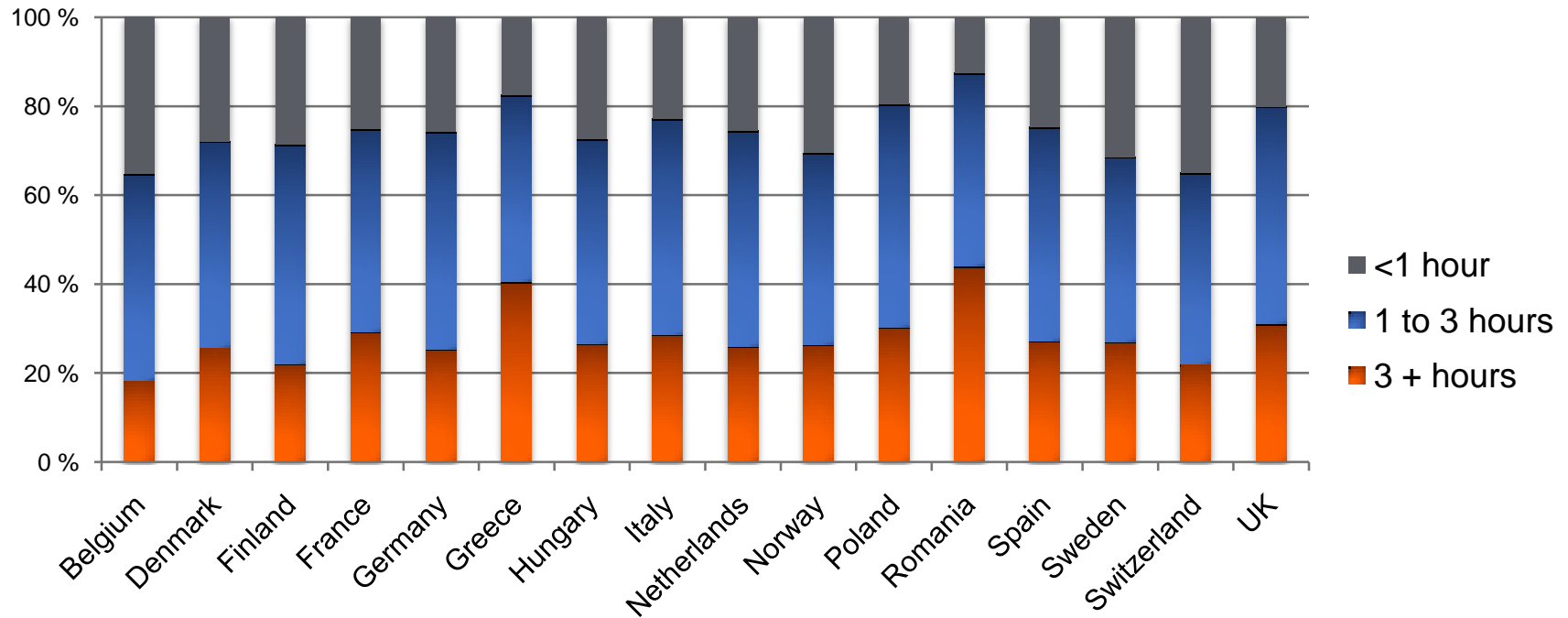
Over three quarters of European internet users go online for an hour or more at a time



On days when you use the Internet, how long do you use it for on an average day?

TIME ONLINE - DURATION

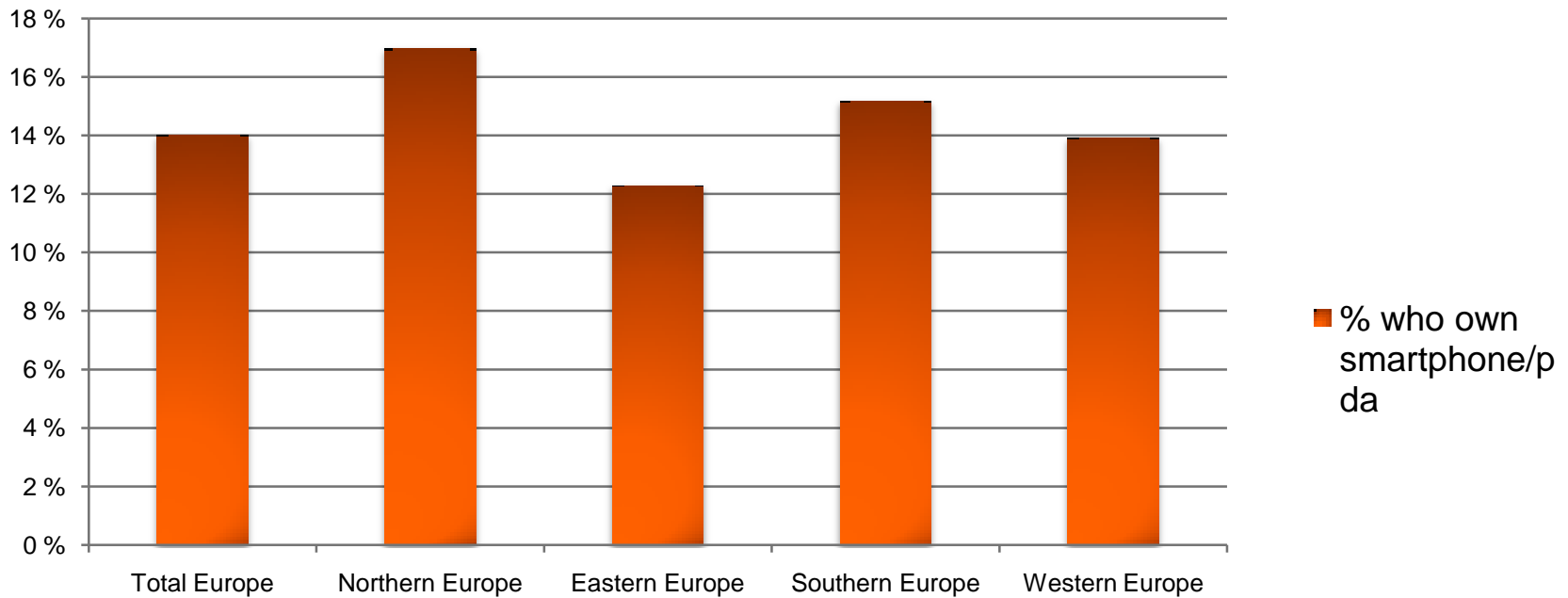
Tendency for users in less developed markets to spend more time online



On days when you use the Internet, how long do you use it for on an average day?

TECH SPEC – SMARTPHONE/PDA

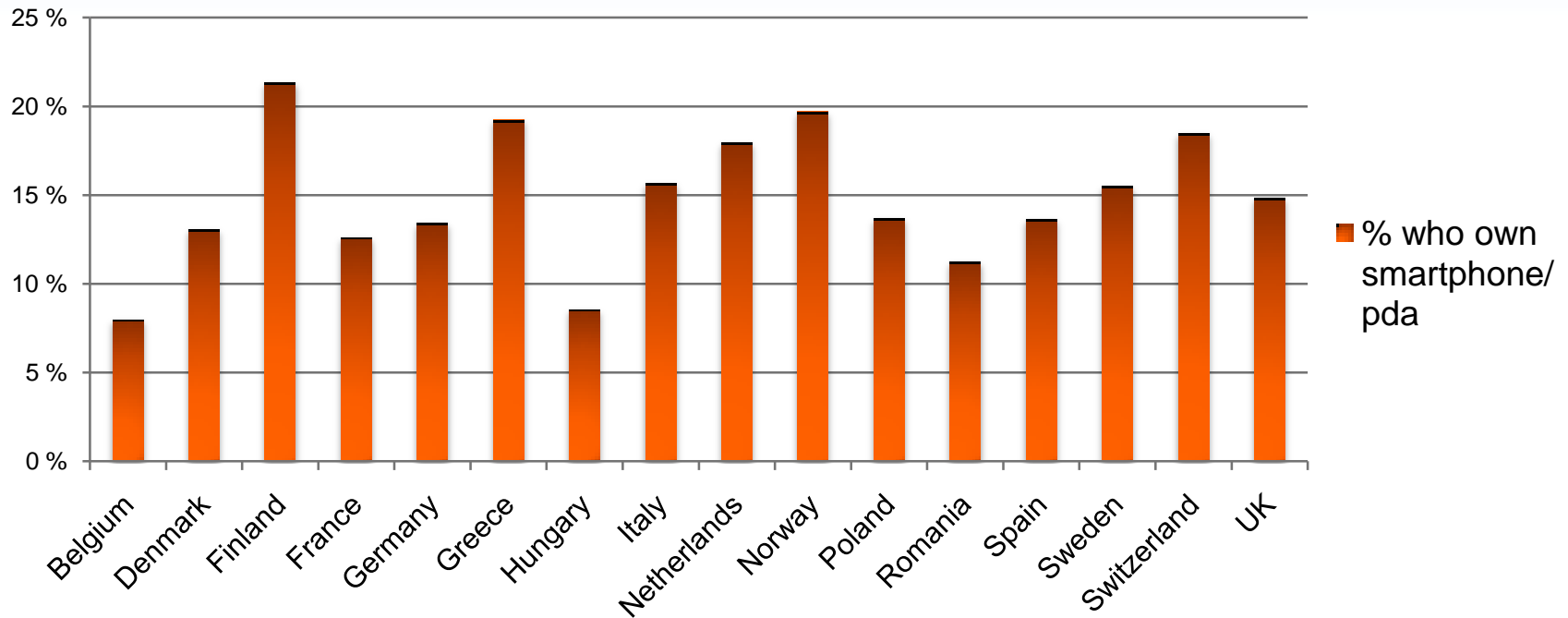
20% of European males and 8% of European females own smartphone



Do you own a smartphone or pda (a mobile phone with advanced functionalities, eg iPhone, BlackBerry, HTC Touch.....)

TECH SPEC – SMARTPHONE/PDA

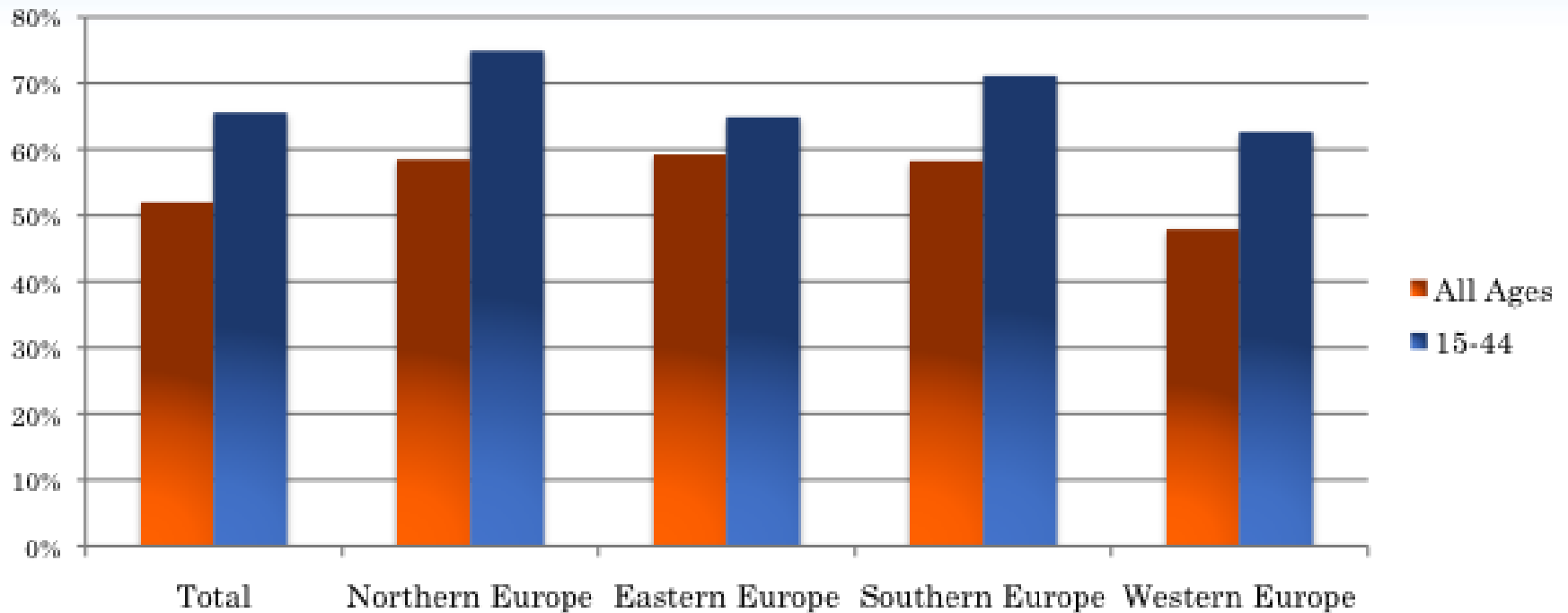
Smartphone owners are in the minority in every territory



Do you own a smartphone or pda (a mobile phone with advanced functionalities, eg iPhone, BlackBerry, HTC Touch.....)

SOCIAL NETWORKING ACROSS EUROPE

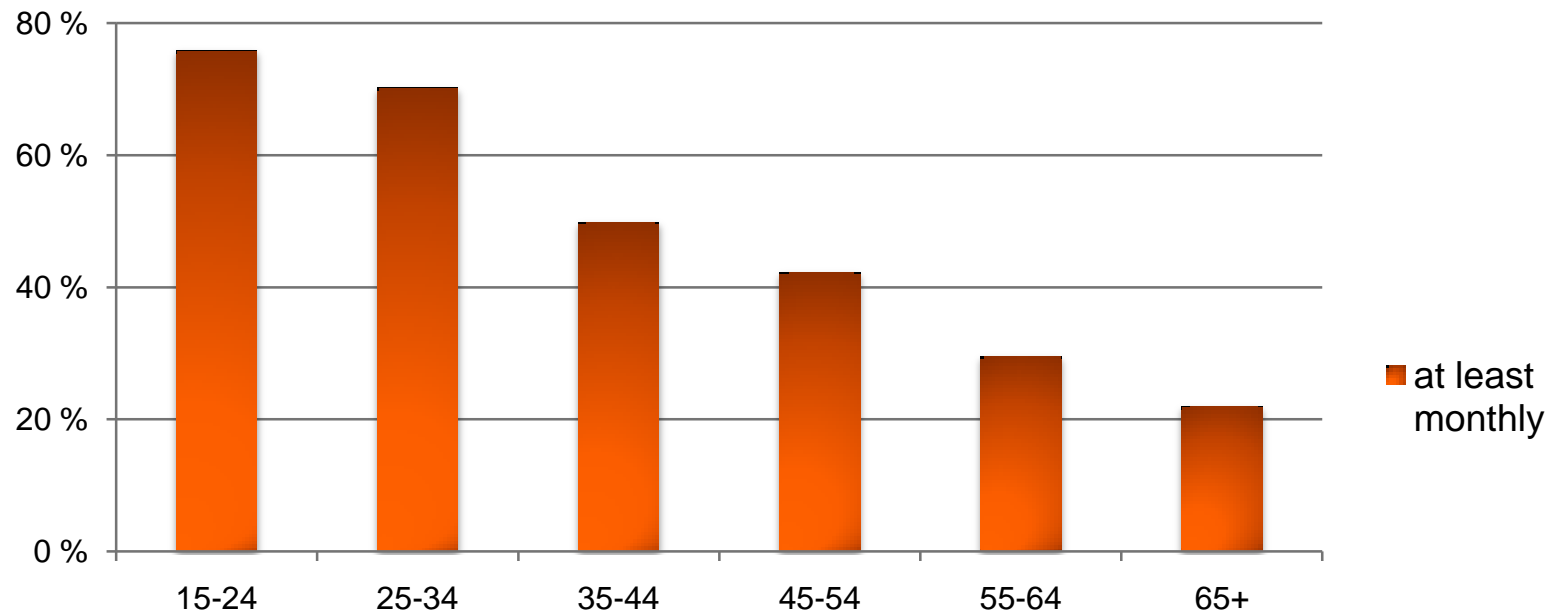
Over half of internet users across Europe regularly use social networks



How often do you update a profile on a social network or check other people's profiles on a social network?

SOCIAL NETWORKING BY AGE

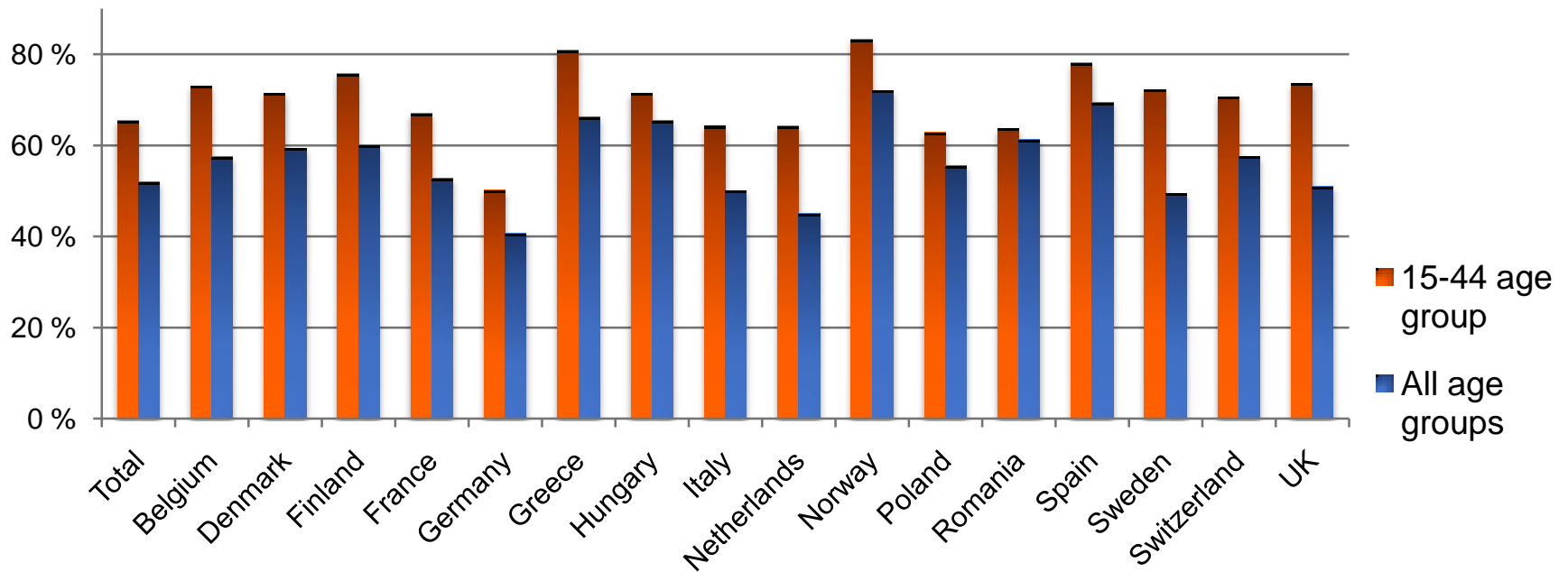
Europe's 15-34 year olds are the most enthusiastic social networkers



How often do you update a profile on a social network or check other people's profiles on a social network?

SOCIAL NETWORKING BY COUNTRY

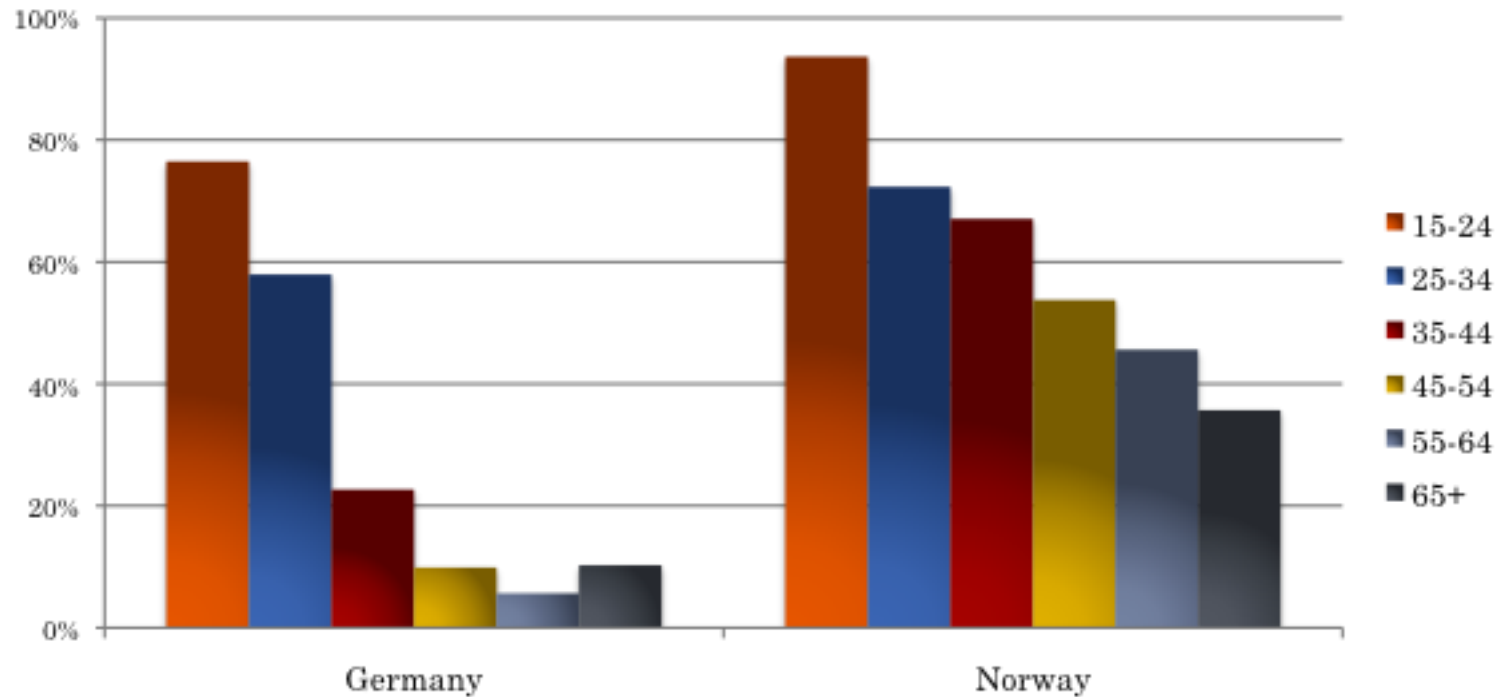
Social networking has been embraced in all markets, regardless of their 'maturity'



How often do you update a profile on a social network or check other people's profiles on a social network?

SOCIAL NETWORKING BY AGE GROUP - SPOTLIGHT

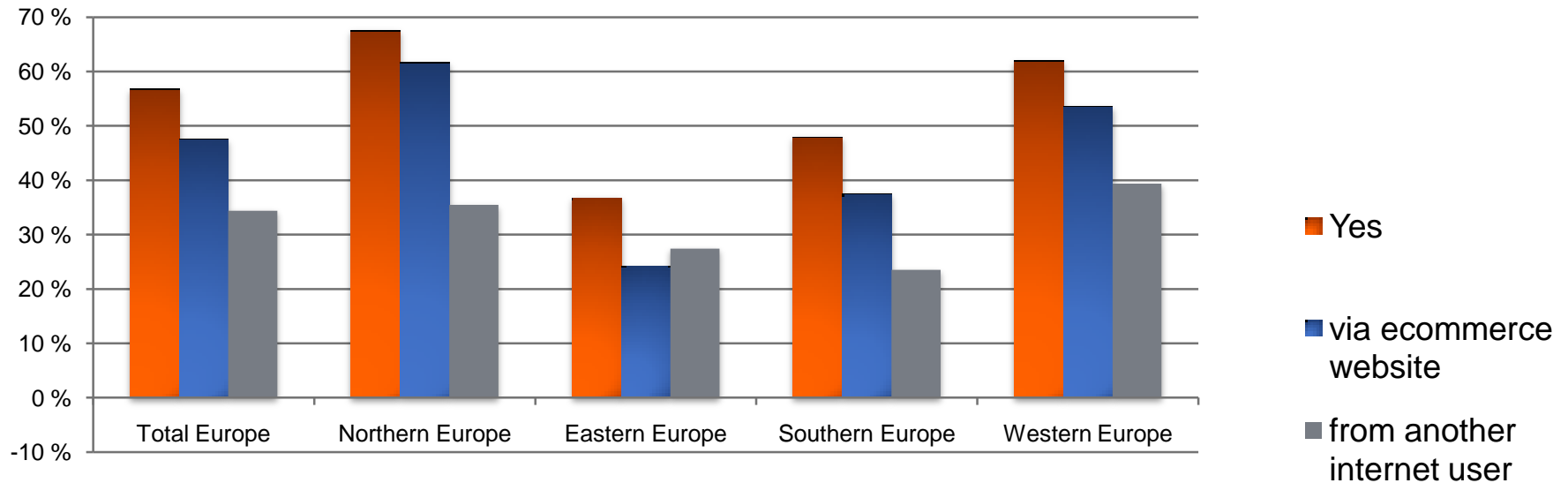
The patterns of social networking by age vary significantly across regions



Are you a member of an online social network?

E COMMERCE BY REGION

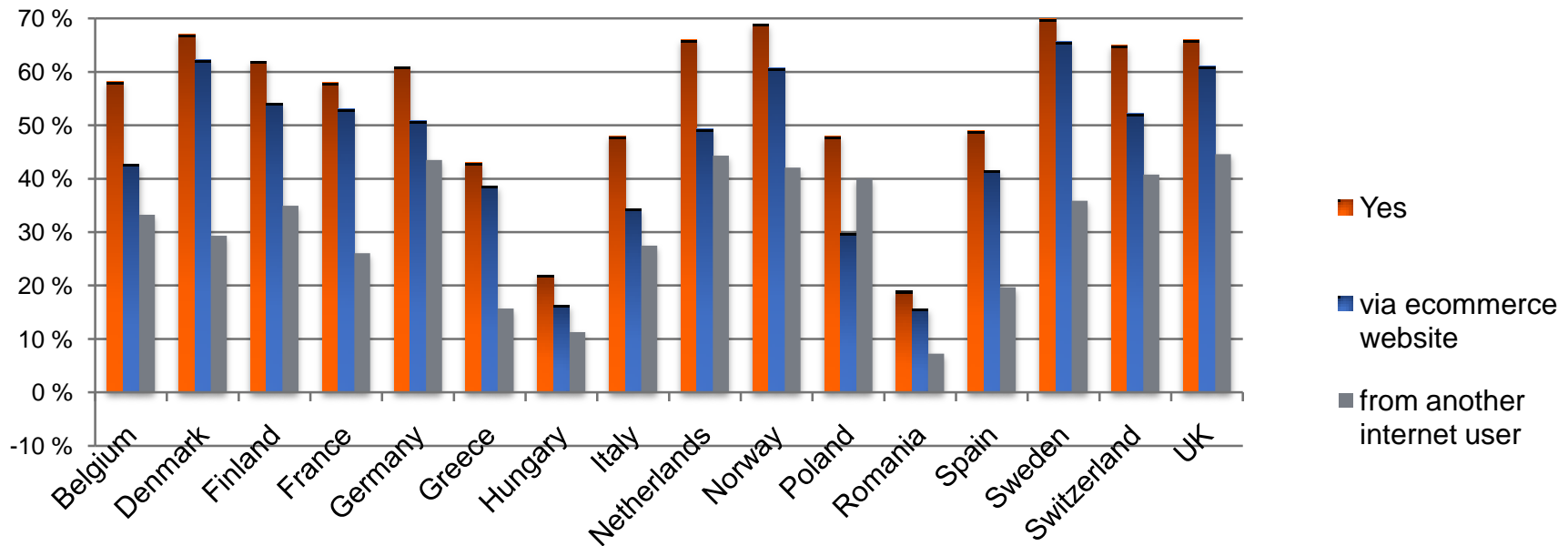
Commentary to be added



% of respondents who have ever purchased a product or service on the internet

E COMMERCE BY COUNTRY

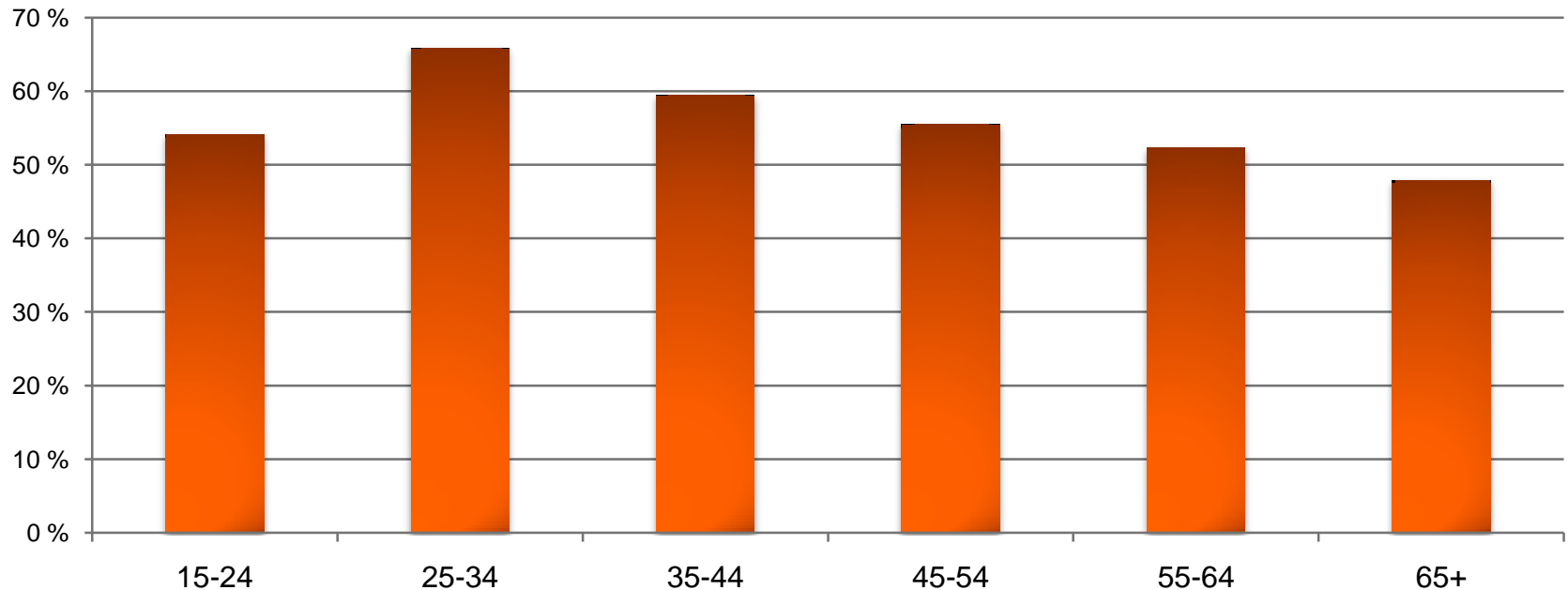
Buying online is not yet the norm in all territories



% of respondents who have ever purchased a product or service on the internet

E COMMERCE BY AGE GROUP

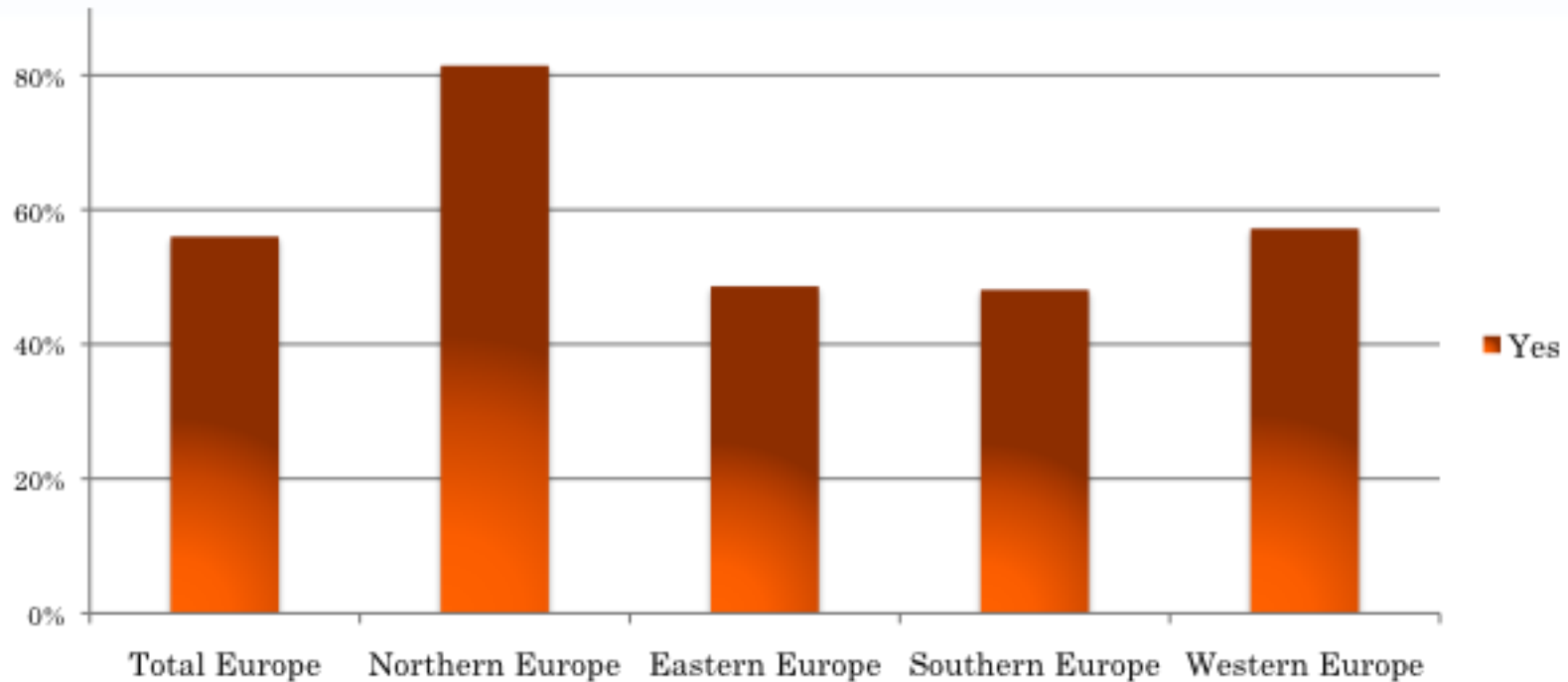
Online shopping activity remarkably stable across all age groups



% of respondents who have ever purchased a product or service on the internet

ONLINE BANKING

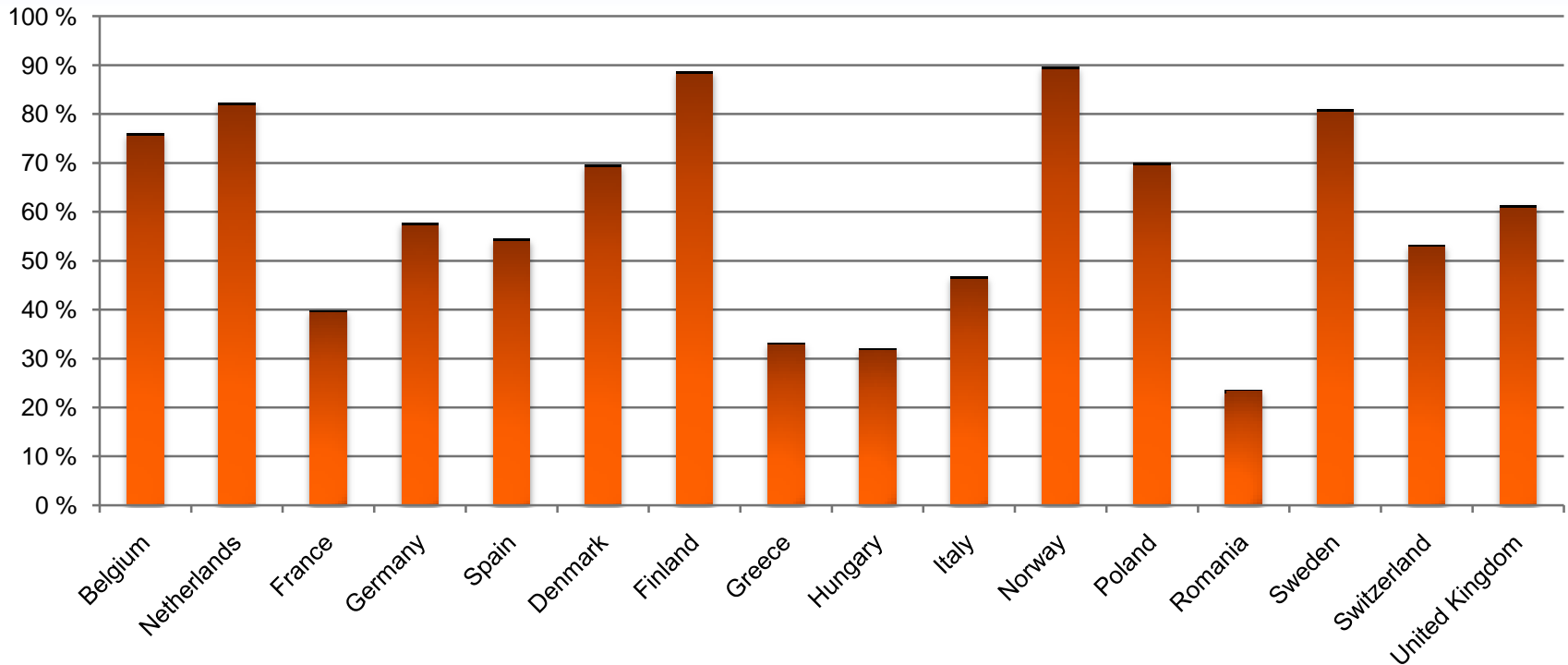
56% of Europe's internet users perform banking transactions online



Do you use online banking applications?

ONLINE BANKING

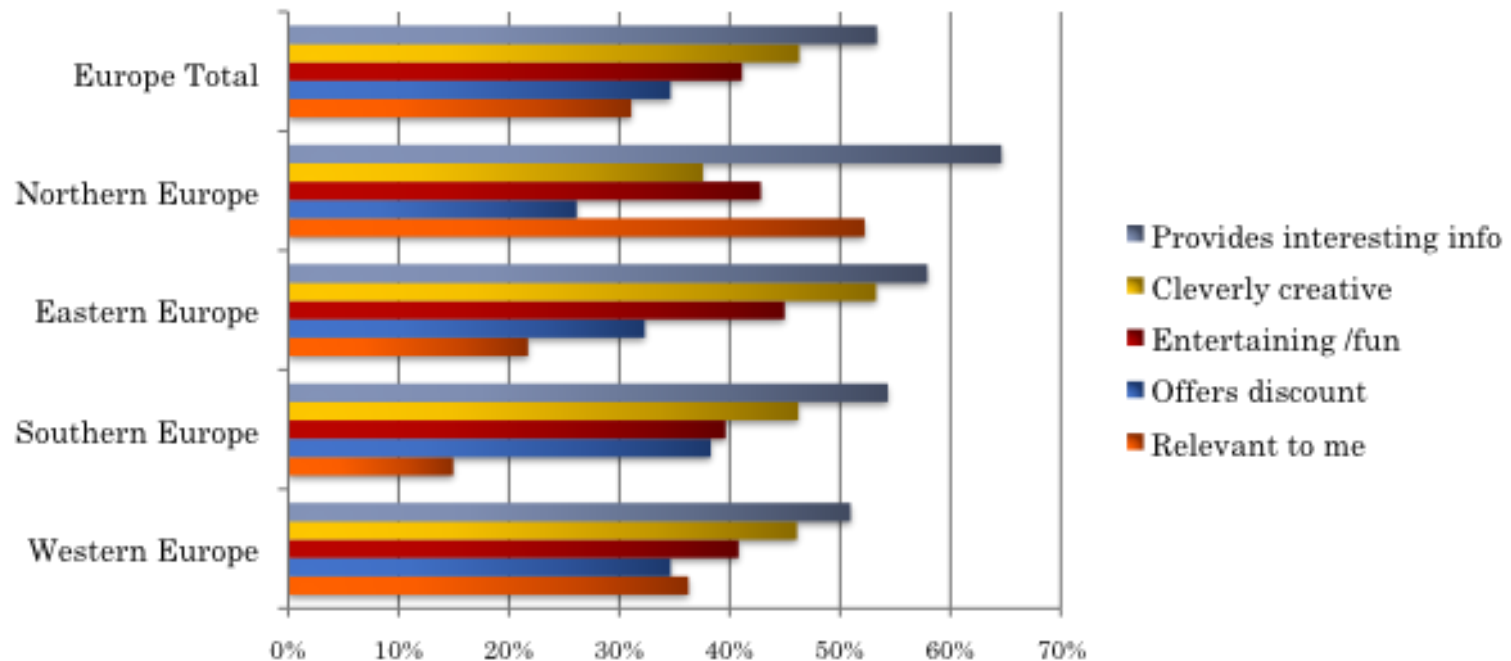
Use of online banking services is dependent on provision of tailored services – only worthwhile once internet use is widespread



Do you use online banking applications?

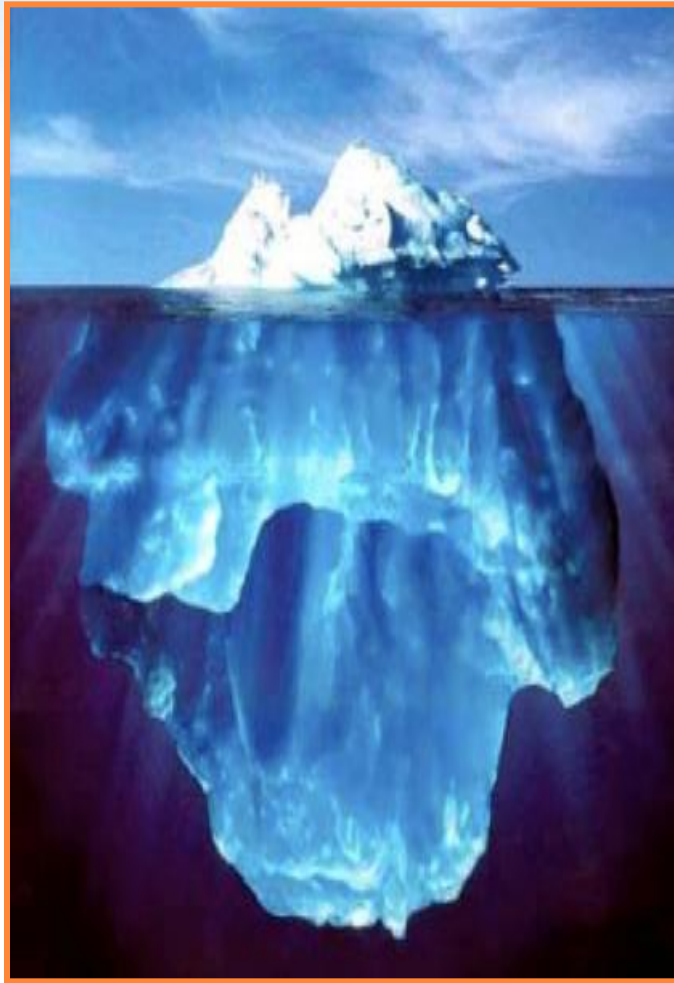
GOOD ONLINE ADVERTISING

Internet users from every region



According to you, what are the 3 main characteristics of good online advertising?

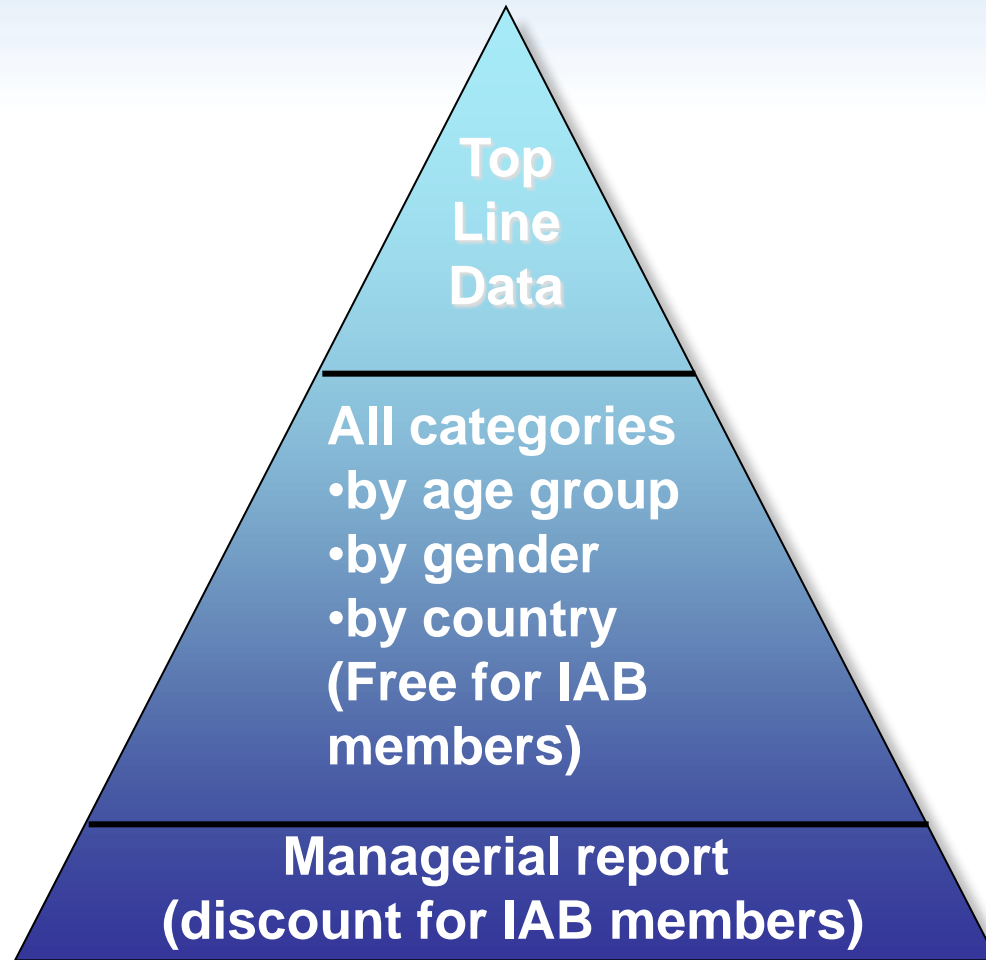
THIS PRESENTATION IS ONLY



...the tip of the iceberg

There's a lot more
waiting for you to
discover

THIS PRESENTATION IS ONLY



CONTACTS FOR IAB MEMBERS

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