Mediascope Europe

The Connected Life of Digital Natives

Bulletin

July 2013

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IAB Europe Research

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.

About this Bulletin

This Bulletin brings you an analysis of the 16-24 demographic including their digitally focused media consumption, how they are seeking to connect with brands online and the multiple devices used as part of their every day lives.

A full report is available to purchase upon request – see end of document for details.

The data comes from IAB Europe's Mediascope study. Further information an methodology can be found at: http://www.iabeurope.eu/research/mediascope-europe/about-mediascope.aspx

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Definition of a Digital Native:

Someone aged 16-24 who uses the internet on a weekly basis

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Key findings

1. Media consumption is migrating online
2. Digital Natives connect via a range of devices
3. Internet as part of their everyday routine
4. 16-24s are influenced by and connect with brands online

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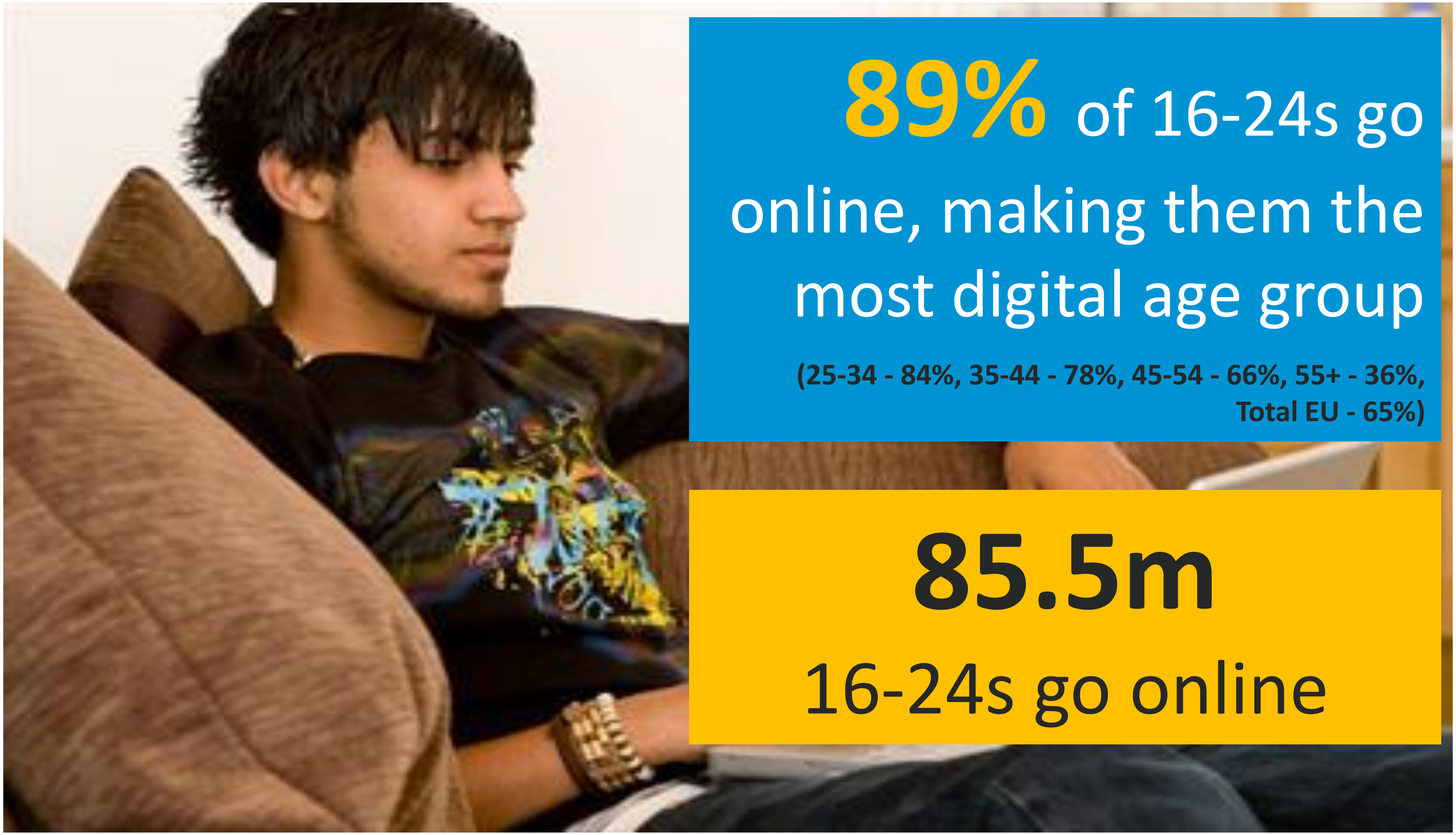
1. Media consumption is migrating online



89% of 16-24s go online, making them the most digital age group

(25-34 - 84%, 35-44 - 78%, 45-54 - 66%, 55+ - 36%, Total EU - 65%)

85.5m

16-24s go online

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Base: (Omnibus) All 16-24s n=3,061; All 24-34s n=3,675; All 35-44s n=4,090; All 45-54s n=4,101; All 55+s n=7,979

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16-24s media penetration

92%
watch TV
(Total EU 95%)

59%
listen to radio
(Total EU 64%)

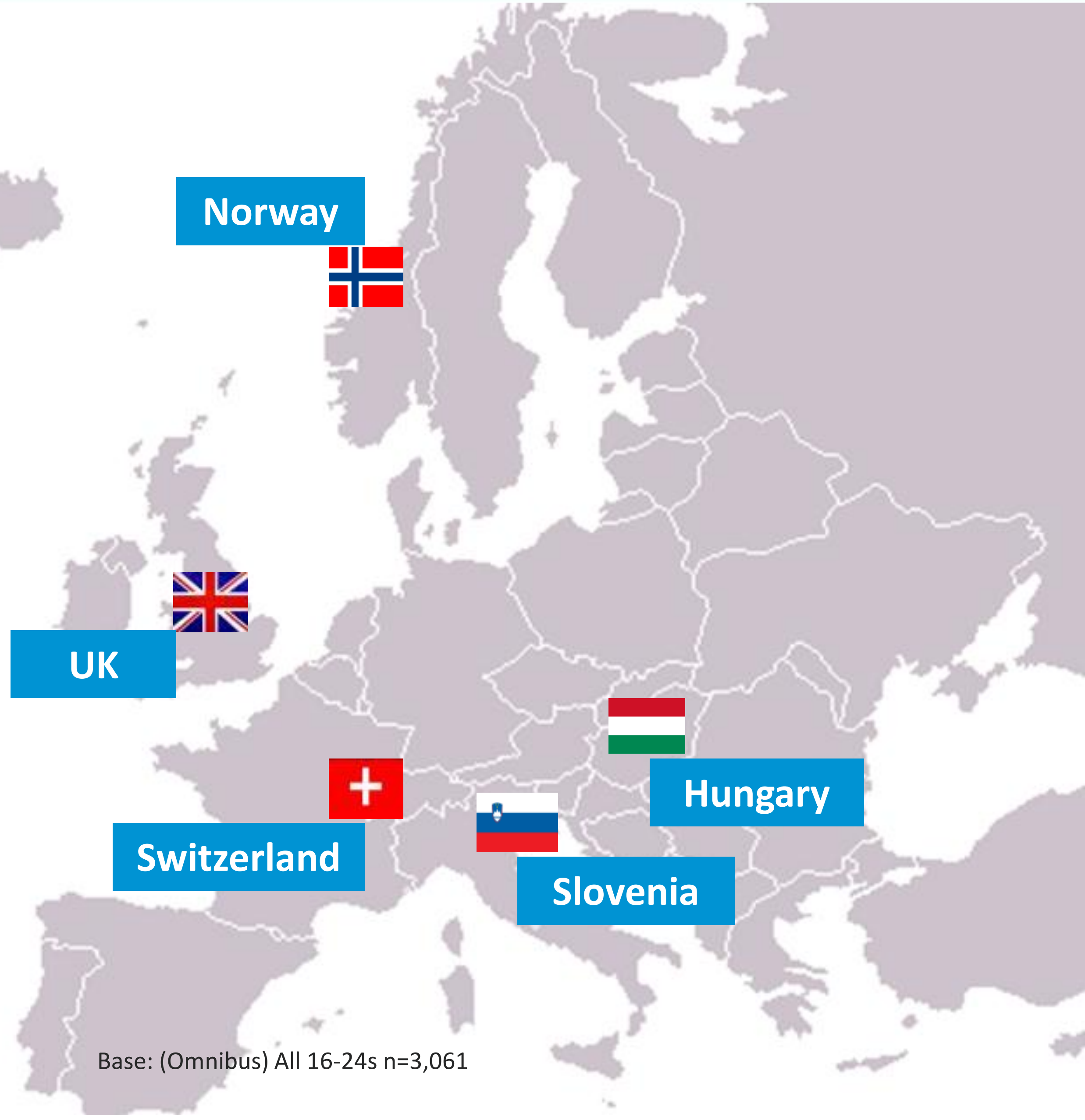
46%
read magazines
(Total EU 48%)

52%
read newspapers
(Total EU 62%)

89%
use the internet
(Total EU 65%)

Base: (Omnibus) All 16-24s n=3,061

In some markets 100% of 16-24s use the internet on a weekly basis



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Base: (Omnibus) All 16-24s n=3,061

16-24s time online

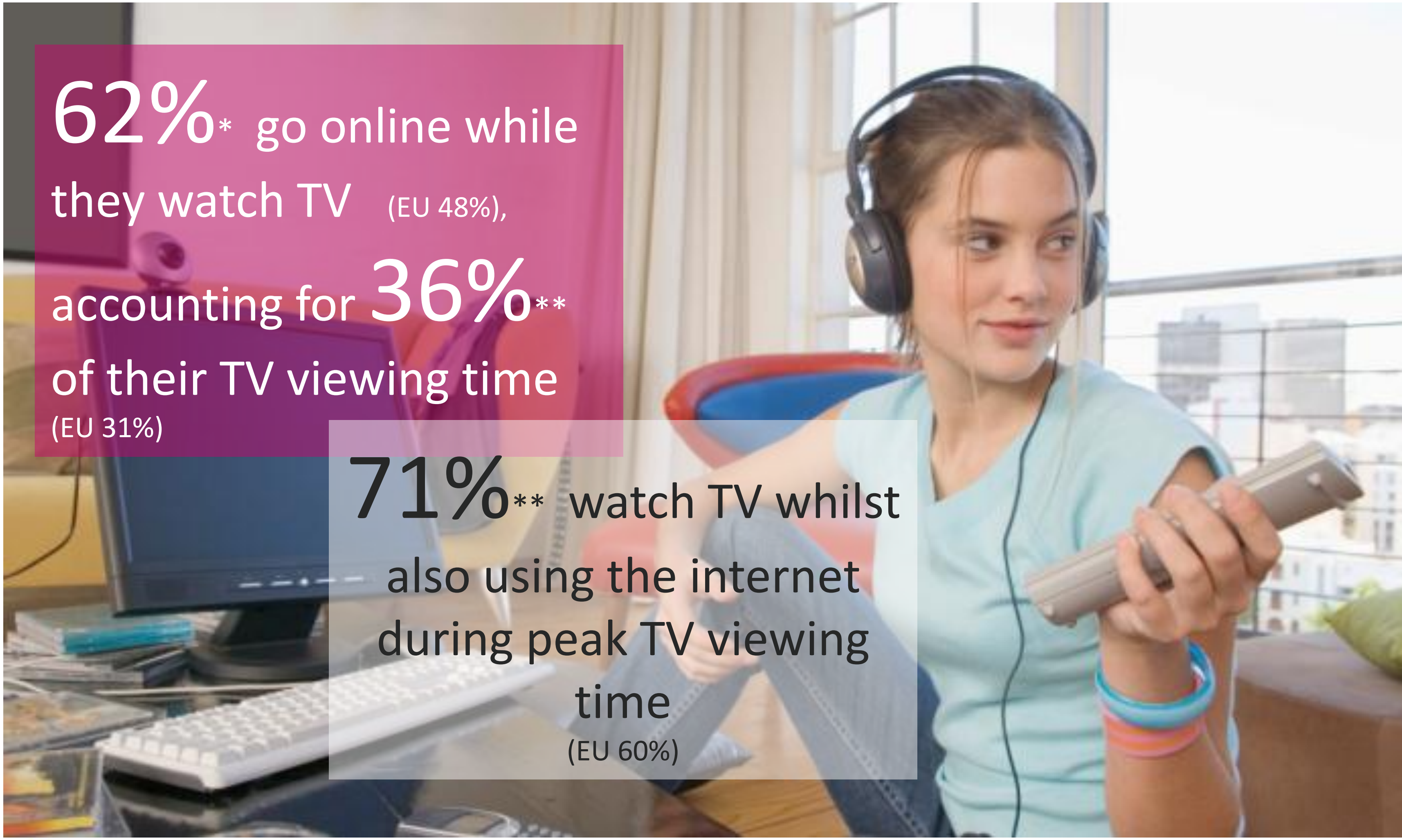
16-24s spend **19.2 hours** online a week

30% more than the average European internet user

Total EU: 14.8 hours

Base: (Omnibus) All internet users n=15,290, All 16-24 internet users n=2,771

TV viewing and time online are merging



62%* go online while they watch TV (EU 48%), accounting for 36%** of their TV viewing time (EU 31%)

71%** watch TV whilst also using the internet during peak TV viewing time (EU 60%)

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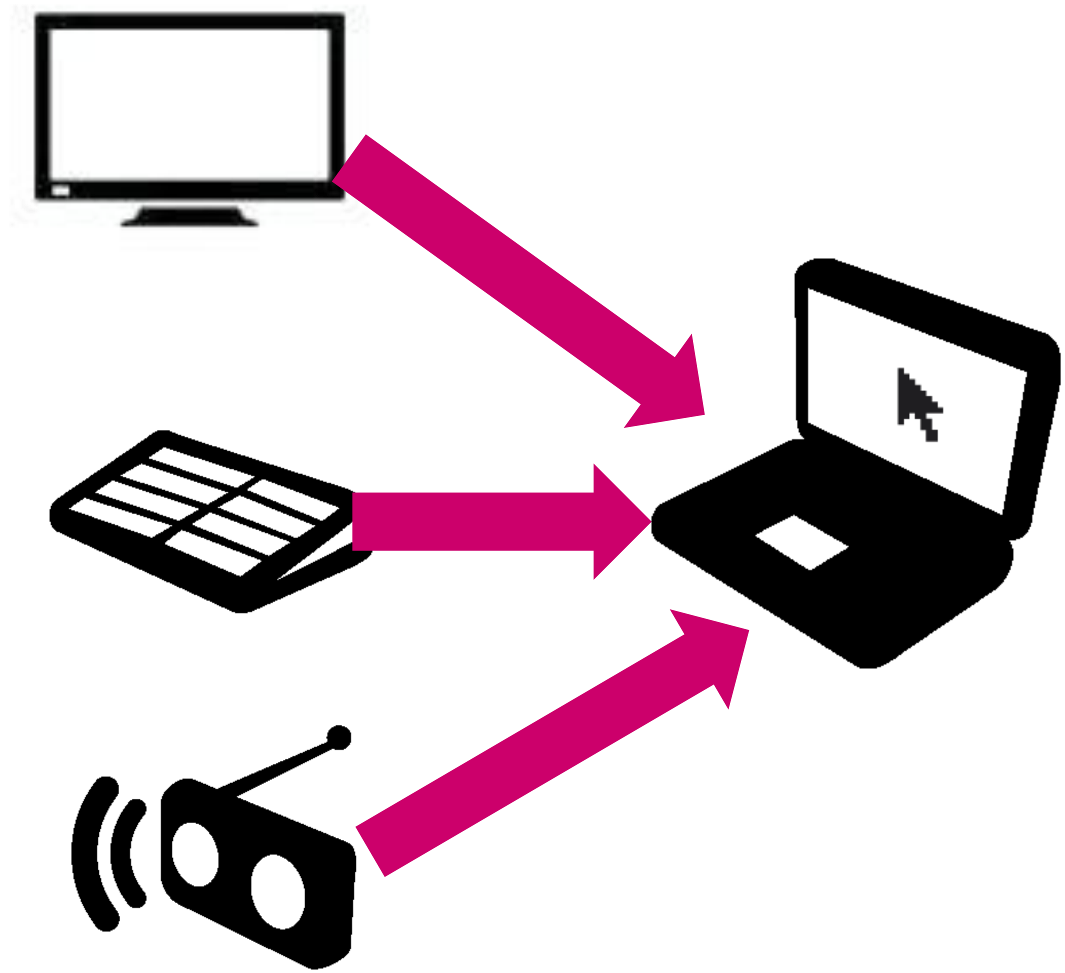
Base: All European giving a response for using the internet whilst watching TV, n=17,413
All 16-24 giving a response for using the internet whilst watching TV, n=2825

Media consumption is becoming digital

Digital Natives spend less time watching TV (14.4 hrs vs EU 16.8hrs), and **32%** watch **TV** online on a weekly basis (EU 24%)

61% visit **news** sites weekly, compared to 52% who read newspapers (EU 67%, 62%)

42% listen to **radio** online weekly, compared to 59% who listen in the traditional way (EU 28%, 64%)



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Base: (Online) 16-24 who use internet n=4,218, All internet users n=27,446

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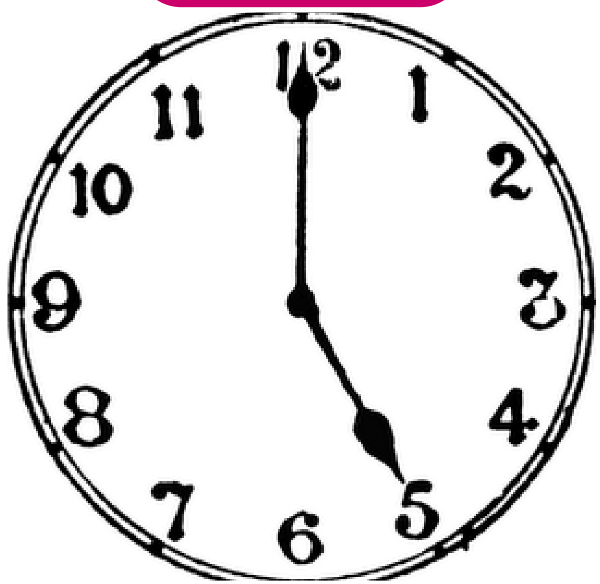
16-24s are online throughout the day

06:00-10:00:
35%
TOTAL EU: 35%

10:00-17:30
76%
TOTAL EU: 74%



17:30-21:00
86%
TOTAL EU: 79%

21:00-06:00
61%
TOTAL EU: 48%

Base (Omnibus): 16-24 internet users n=2,771

2. Digital Natives connect via a range of devices

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Devices create an ‘always on’ experience for 16-24s

86% access via PC/laptop

Index vs total EU = 134/EU total - 64%

43% access via mobile

Index vs total EU = 205/EU total – 21%

13% access via tablet

Index vs total EU = 163/EU total – 8%

15% access via games console

Index vs total EU = 250/EU total – 6%

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Base: (Omnibus) All 16-24s n= 3,061All respondents 16+ n=22,918

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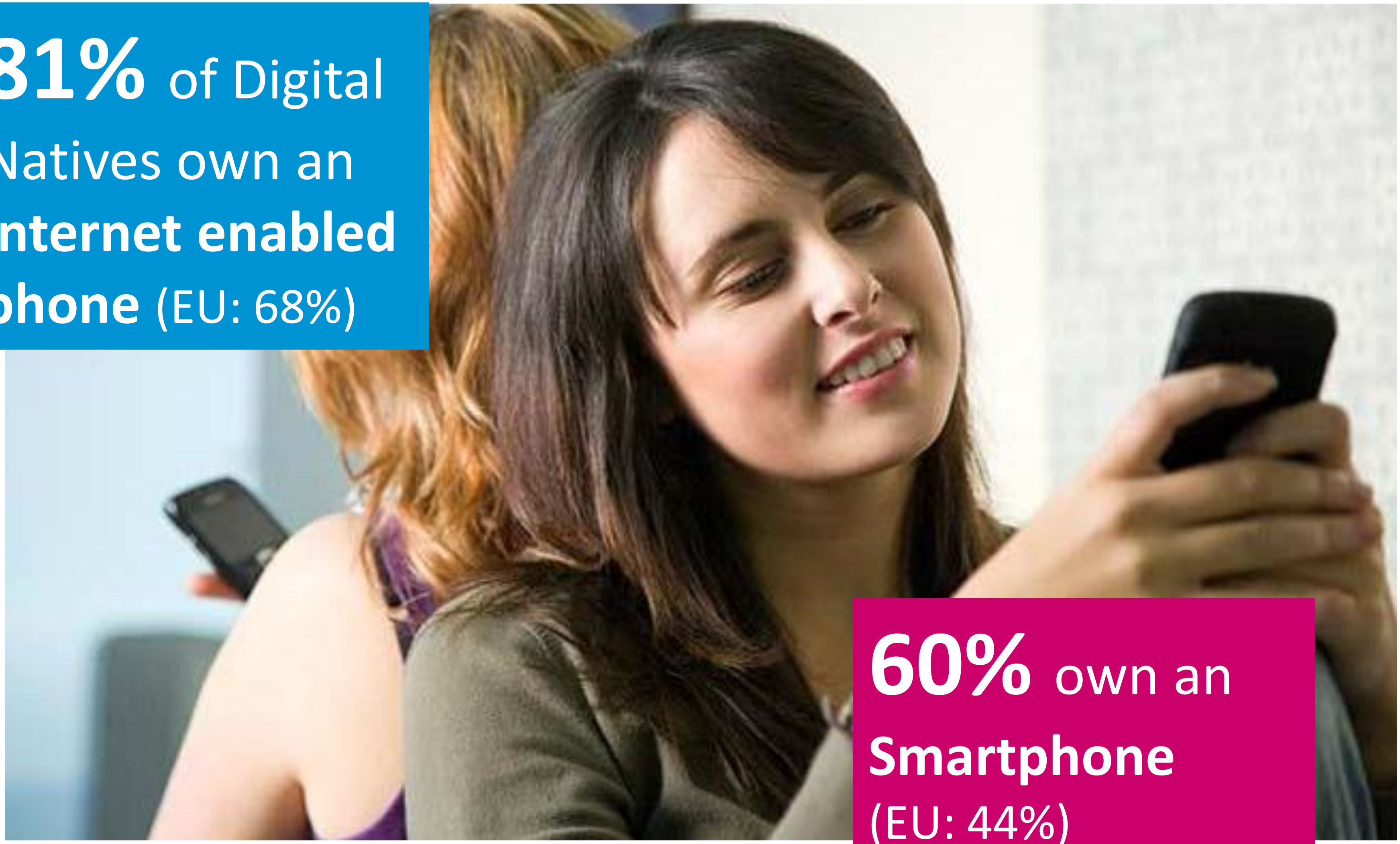
Internet access 'on the go'



81% of Digital Natives own an **internet enabled phone** (EU: 68%)

60% own an **Smartphone** (EU: 44%)

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Base: (online) All Europe internet users n=27,179; 16-24 internet users n=4296

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3. Internet as part of their everyday routine

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Internet is central to communication

69% say they are more able to keep in touch with friends and family since going online
(EU 63%)

78% use email everyday
(EU 74%)

70% use personal social networks daily
(EU 44%)

34% use instant messaging daily
(EU 24%)

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Base: (Online) 16-24 who use internet n=4,218, All internet users n=27,446

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Digital Natives use social media to update friends/family

82%

use a personal social network weekly (EU 62%)

70% daily (EU 44%)

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Base: (Online) 16-24 who use internet n=4,218, All internet users n=27,446

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Digital Natives buy more online

Digital Natives **buy more products online** than the average European
(14.8 products in 6 months vs. 13.4)

They spend on average **425 euros** in 6 months online (EU 545 euros)

One **fifth** of their shopping is done online
(20% vs. EU 19%)

4. 16-24s are influenced by and connect with brands online

Digital Natives influenced by brands' online presence

32% are more likely to buy product from brand they follow on a social network site (EU 31%)

42% are influenced by the way a brand communicates online (EU 42%)

43% are inclined to find out more about brands they see advertised online (EU 47%)

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Base: (Online) 16-24 who use internet n=4,218

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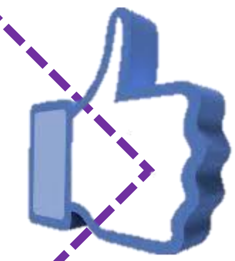
Social media enables two-way communication between brands and Digital Natives…



83% have liked/become a friend of a brand
(EU 67%)

42% have created a group for a favourite brand
(EU 52%)

76% have visited a fan page
(EU 60%)

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Base: (Online) 16-24 who use internet n=4,218

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From Bulletin to full Report

The full Report provides more in-depth data on the following:

- 16-24s multi-device usage and time spent per media
- Use of social media
- Activities performed via the internet on a mobile phone
- The role the internet plays during their purchasing cycle & top online purchases
- How they seek to connect digitally with brands

Plus conclusions with key insights for marketers.

To purchase the full Report or for more information about Mediascope Europe please contact: mediascope@iabeurope.eu

Accessing the data

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Executive Summary and Data Presentations

Find out more from IAB Europe or your local IAB

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

More information

A library of reports from our latest Mediascope Europe study is available looking at particular markets, different demographics and media users.

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http://www.iabeurope.eu/join-us.aspx

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