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](http://www.iabeurope.eu/research/mediascope-europe/about-mediascope.aspx)
Definition of a Digital Native:
Someone aged 16-24 who uses the internet on a weekly basis
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
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

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
16-24s media penetration

- **92%** watch TV (Total EU 95%)
- **89%** use the internet (Total EU 65%)
- **59%** listen to radio (Total EU 64%)
- **52%** read newspapers (Total EU 62%)
- **46%** read magazines (Total EU 48%)

Base: (Omnibus) All 16-24s n=3,061
In some markets 100% of 16-24s use the internet on a weekly basis.

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%)

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 16.8 hrs), 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%)

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

Base: (Omnibus) All 16-24s n= 3,061 All respondents 16+ n=22,918
Internet access ‘on the go’

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

60% own an Smartphone (EU: 44%)

Base: (online) All Europe internet users n=27,179; 16-24 internet users n=4296
3. Internet as part of their everyday routine
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%)

34% use instant messaging daily (EU 24%)

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

Base: (Online) 16-24 who use internet n=4,218, All internet users n=27,446
Digital Natives use social media to update friends/family

82% use a personal social network weekly (EU 62%)
70% daily (EU 44%)

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

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

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

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