

EIAA

Sport and the Shift to Interactive Media 2008

Pan-European results
June 2008

EIAA Objectives

- Champion and improve the understanding of online advertising as a medium
- Promote the efficiency of online advertising as part of the 'media mix'
- Think regionally, benefit regionally and at local level
- Increase the total value of investment into online advertising

Background

- The European Interactive Advertising Association (EIAA) was formed in 2001 to act as a common, pan-European voice for the interactive advertising industry

- Members are:



- EIAA has made significant investment in research, particularly in the areas of media consumption, media spend and advertising efficiency
- As part of this commitment to research, the EIAA has for the past five years conducted a large scale study of media consumption habits in Europe
- SPA has conducted the survey since 2005

Presentation agenda

1. Mediascope Europe 2007 Introduction
 - Research objectives
 - Methodology and sample
2. Sport and the Shift to Interactive Media 2008
 - Sport site users and media convergence
 - 'Play' on
 - Sport sites insight
 - Sporting lifestyles
3. Key findings

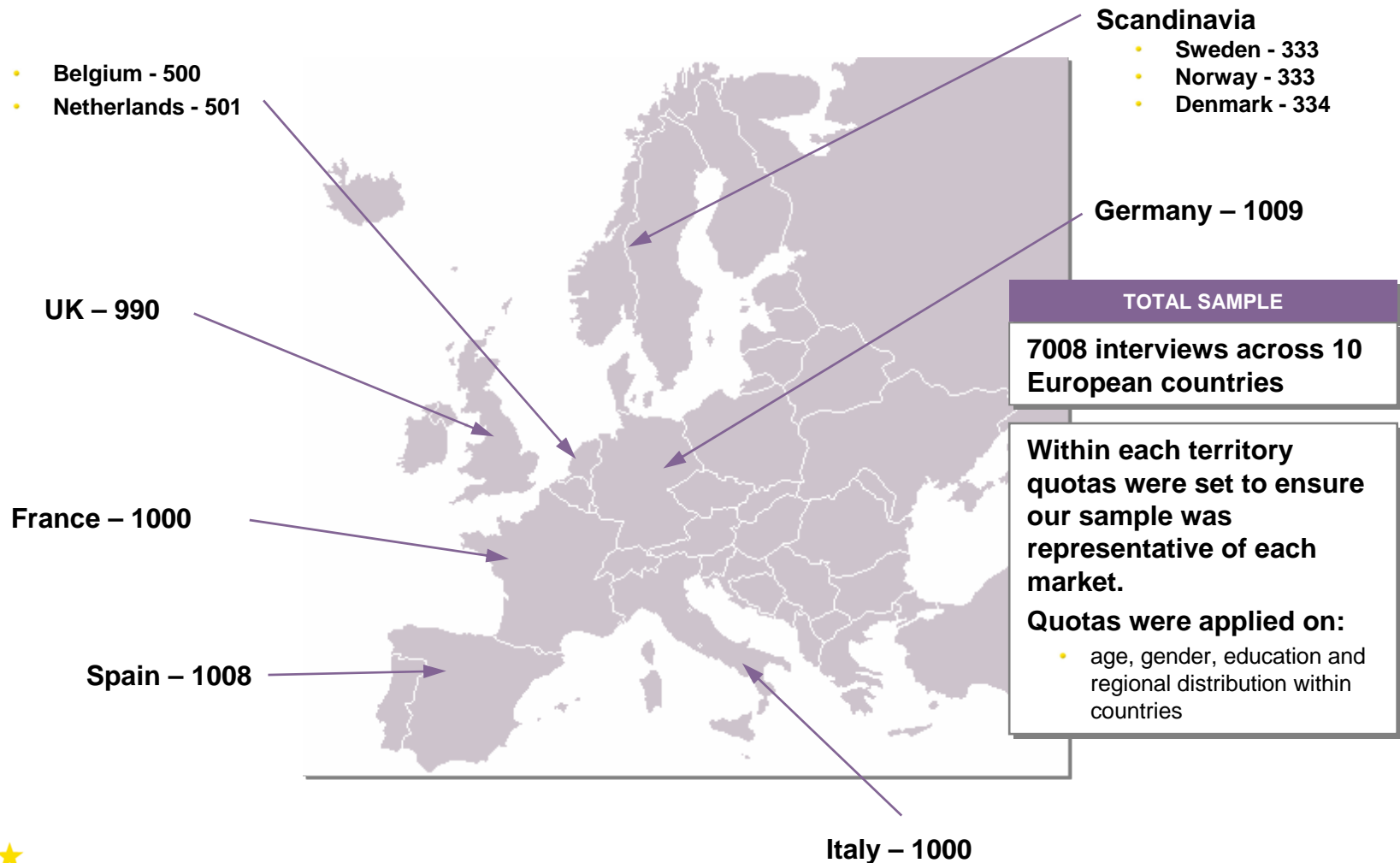
Research objectives

OVERALL PROJECT OBJECTIVE

The broad aim of this study is to measure and track changes in media consumption patterns by various demographic segments and nationalities. This work will show when, why and how often people are using different media – in particular use of the Internet for content, communication and commerce



Methodology and sample



Methodology and sample

- 7008 Computer Aided Telephone Interviews (CATI) were conducted by Synovate on behalf of SPA and the EIAA in 10 countries across Europe
- A sample size of 7008 provides accurate data to $\pm 1.1 - 0.8\%$ at the 95% confidence level
- Fieldwork took place in all territories between 3rd – 28th September 2007
- Interview length ranged from 25-30 minutes
- The application of quotas ensured that representative samples were achieved in each country
 - quotas on age, gender, education and regional distribution
- Results at the total level were weighted to take into account the different countries' population sizes. Using 2007 data from the UN the following weighting matrix was developed

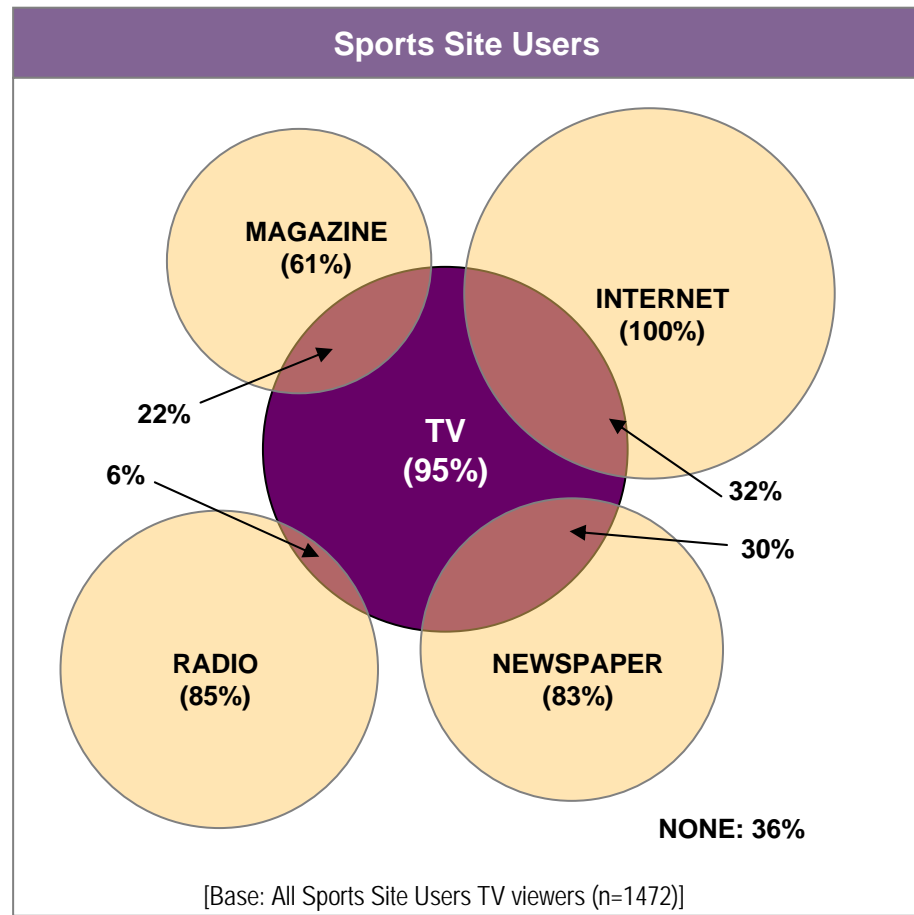
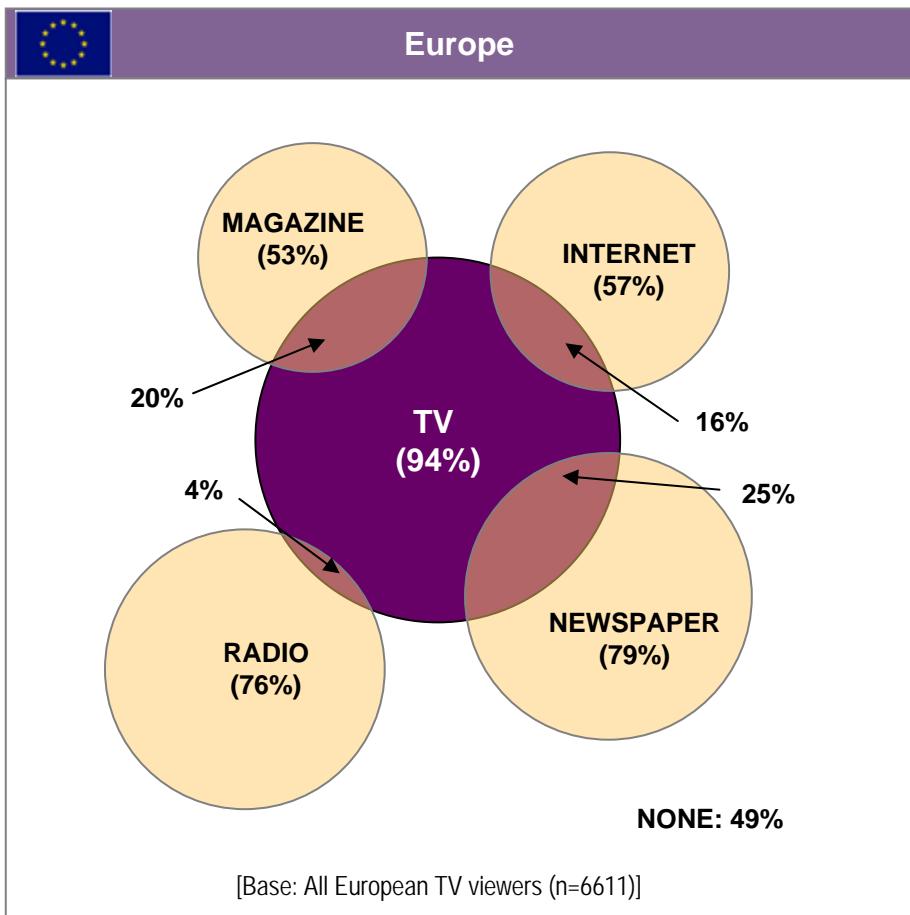
Country / Territory	UK	France	Germany	Italy	Spain	Belgium	Netherlands	Sweden	Norway	Denmark	Total
Total weight	17%	18%	23%	17%	12%	3%	5%	2.5%	1 %	1.5%	100%

Media convergence

- Sporting events happening this summer such as the Olympics and Euro 2008 can act as catalysts for a change in media consumption as fans adopt new habits and technology in order to follow their favourite sports.
- Twice as many sports fans use the internet whilst watching TV compared with the average user (32% vs. 16%)
- Over a third (36%) of all European internet users currently visit sports websites
- Sports site users spend over 13 hours online each week, 10% more time than the average European and an increase of 27% since 2004

32% of sports fans use the internet whilst they watch TV

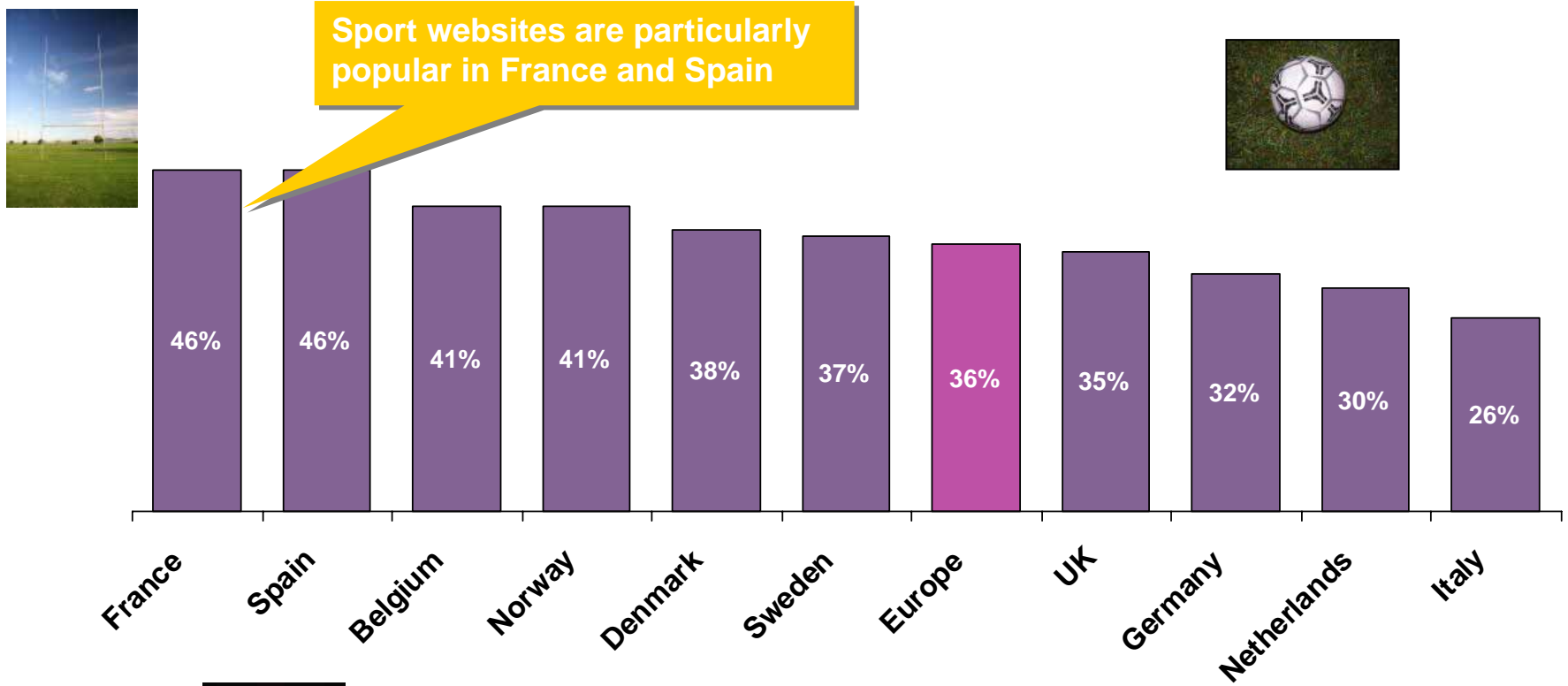
Q5b-f. When you're mainly watching TV, reading a newspaper, reading a magazine, listening to radio, using the internet, which other media do you sometimes use?



36% of all European internet users visit sports sites

Q7a. Which of the following types of websites do you visit at least once a month?

Sports site users by country (%)



[Base: Sports Site Users internet users (n=1548)]

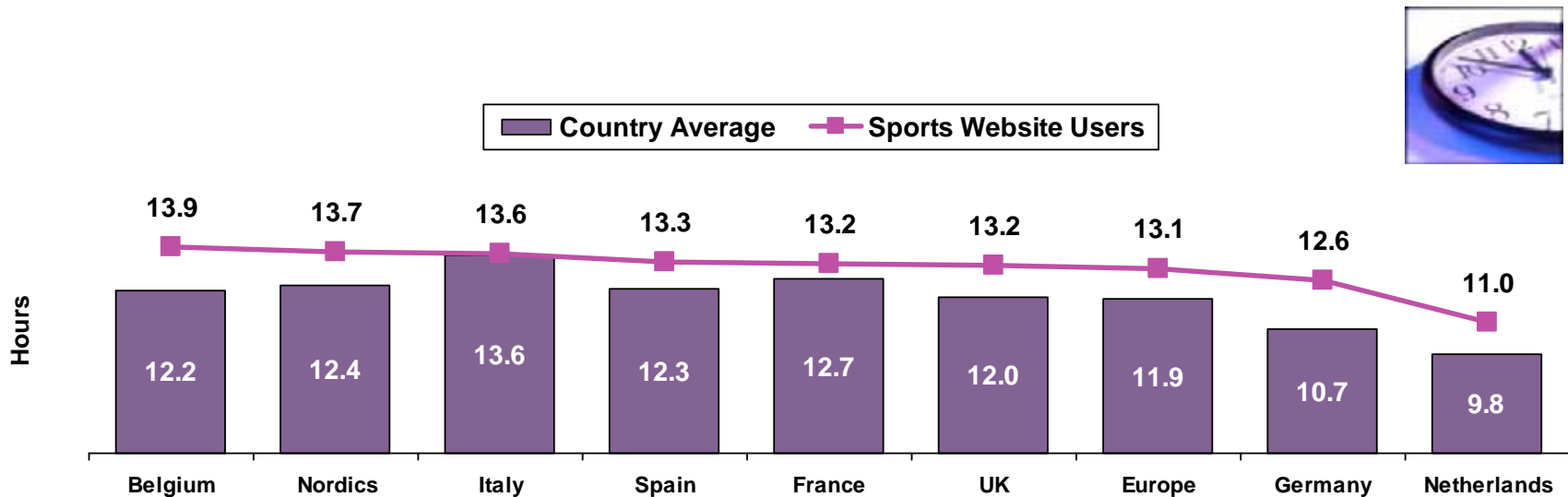


Sports site users spend over 13 hours online each week

Q5ai – Q5aiii. In a typical seven day week, approximately how many hours do you tend to spend using the internet?

Hours spent using the Internet in a typical week

2004 Score	11.7	10.6	8.6	11.1	11.2	10.0	10.3	10.2	10.8
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[Base: All European internet users (n=4166)]

[Base: All Sports Site Users using the internet (n=1548)]

'Play' On

- Nearly 40% of sports site users watch TV, film or video clips online, much more so than the average European internet user (39% vs. 30%) – this activity has grown in popularity amongst sports site users by 144% since 2006
- ComScore figures also show that from January to December 2007, time spent on sites with video streaming and downloads has increased by 72%, from 53 to 91 minutes
- In March 2008 alone, nearly 154 million people visited these sites, an increase of 22% when compared to the same month in 2007.

39% of sports site users watch TV, film or video clips online

Q7b. Which of the following types of web activities do you use at least once a month?

% who watch TV, film or video clips online

% growth
2006 – 2007
amongst
sports site
users

+129%

+87%

+242%

+128%

+144%

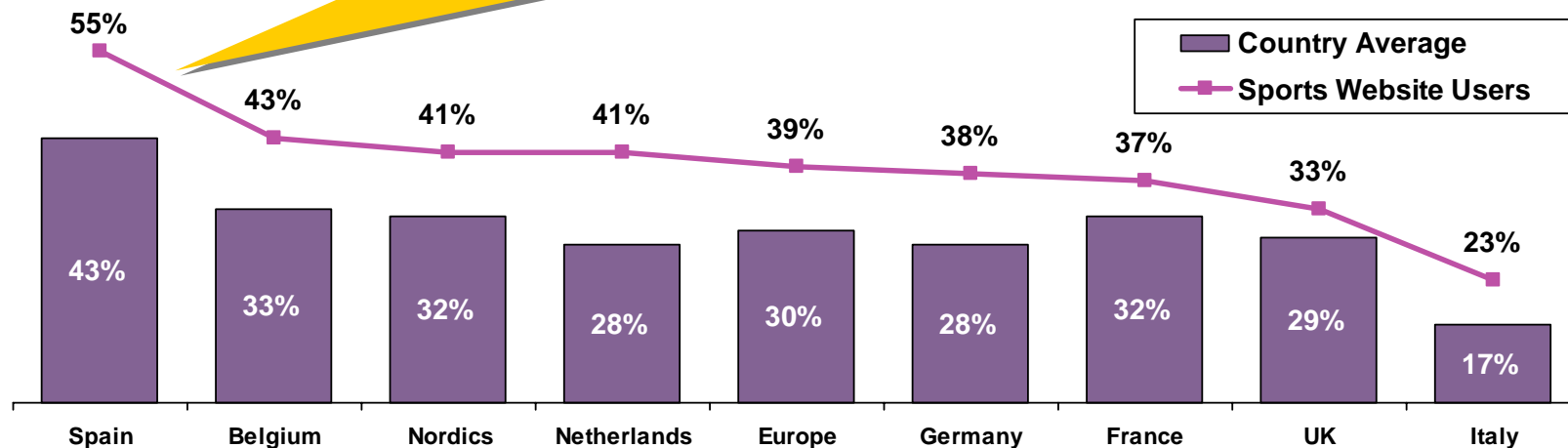
+217%

+106%

+135%

+21%

Watching TV, film or video clips online is especially popular in Spain and Belgium



[Base: All Sports Site Users internet users (n=1548)]

In March 2008 alone, nearly 154 million European people visited sites with video streaming and downloads



Month	Total Unique Users (000)	Average minutes per user
January 2007	119,609	53
February 2007	118,477	61
March 2007	126,192	66
April 2007	122,967	68
May 2007	126,956	82
June 2007	129,182	87
July 2007	128,939	84
August 2007	131,868	81
September 2007	132,856	78
October 2007	137,817	82
November 2007	138,744	85
December 2007	142,973	91
January 2008	145,353	89
February 2008	148,274	87
March 2008	153,970	86

Source: comScore Media Metrix

*Unique Visitors aged 15+, excludes traffic from public computers such as internet cafes or access from mobile phones or PDAs

Sports site insight

- According to comScore, from January to December 2007 an average of 76 million Europeans visited sports sites each month - and further analysis of sports sites shows that visitors significantly peak during the big sporting spectaculars
 - The number of European sport site users increased by around 5 million in September and October 2007 when the Rugby World Cup was on
 - When the Six Nations Rugby tournament took place in March this year, European sports site users rocketed to 84.7 million (up from 77.4 million in February).
- EIAA research shows that from 5.30-9pm 73% of sports site users watch television and 68% use the internet, making them by far the most used media during this peak consumption time
- The internet is also proving a medium for round-the-clock consumption and with 87% of sports site users having broadband, global events such as the Olympics in China this year, present additional high-impact opportunities for marketers to target this audience as they look to follow the action in real-time online.

An average of 76 million Europeans visited sports sites each month in 2007



Month	Total Unique Users (000)	Average minutes per user
January 2007	71,870	52
February 2007	72,130	50
March 2007	79,941	52
April 2007	75,678	53
May 2007	77,641	50
June 2007	73,884	50
July 2007	73,676	52
August 2007	75,416	55
September 2007	80,405	56
October 2007	80,955	54
November 2007	76,857	52
December 2007	76,913	49
January 2008	77,575	57
February 2008	77,396	49
March 2008	84,666	50

Source: comScore Media Metrix

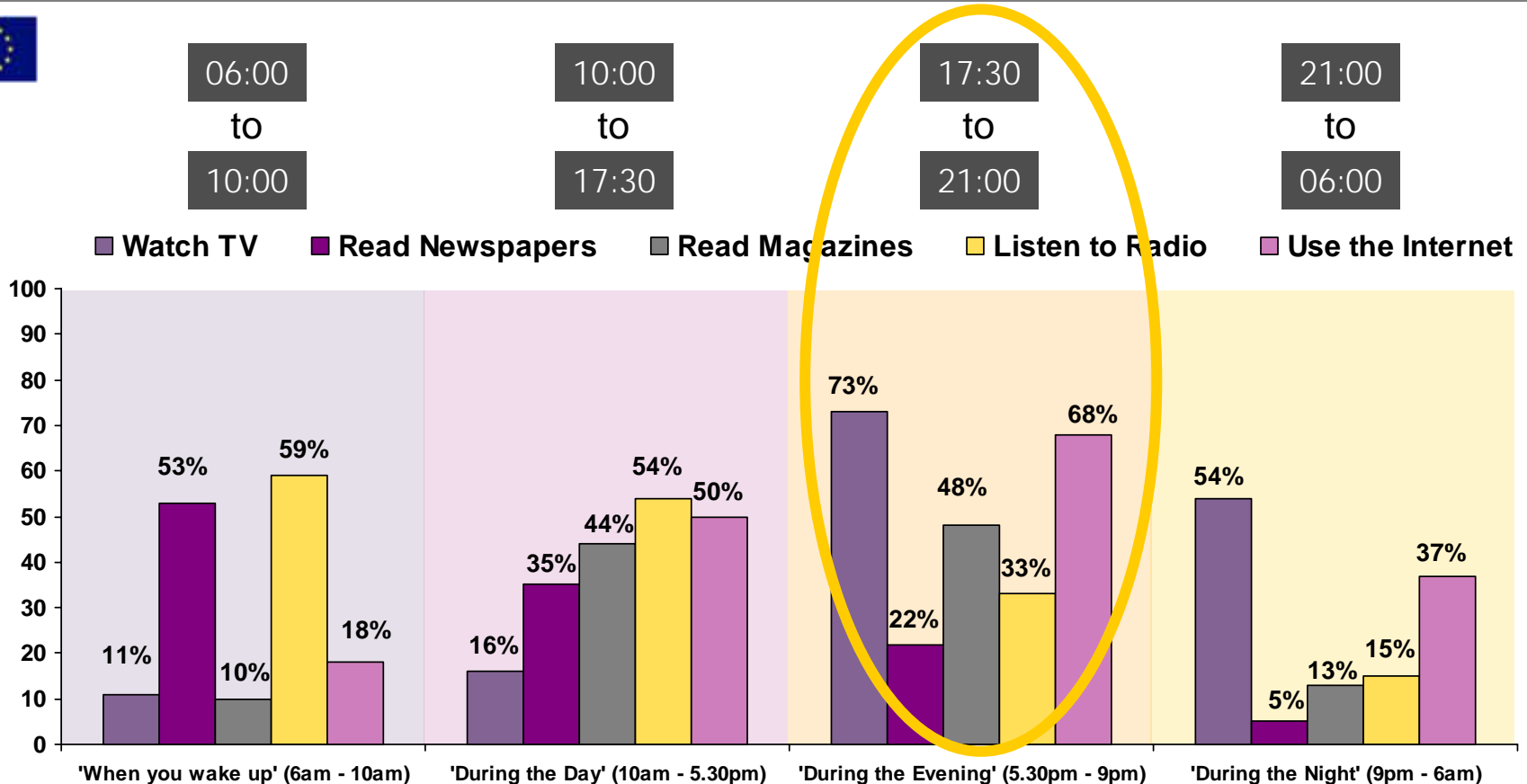
*Unique Visitors aged 15+, excludes traffic from public

computers such as internet cafes or access from mobile phones or PDAs

73% of sports fans watch television and 68% use the internet from 5.30-9pm

Q1b. What times of the day do you typically...during week?

Time of day use each type of media - Sports Site Users

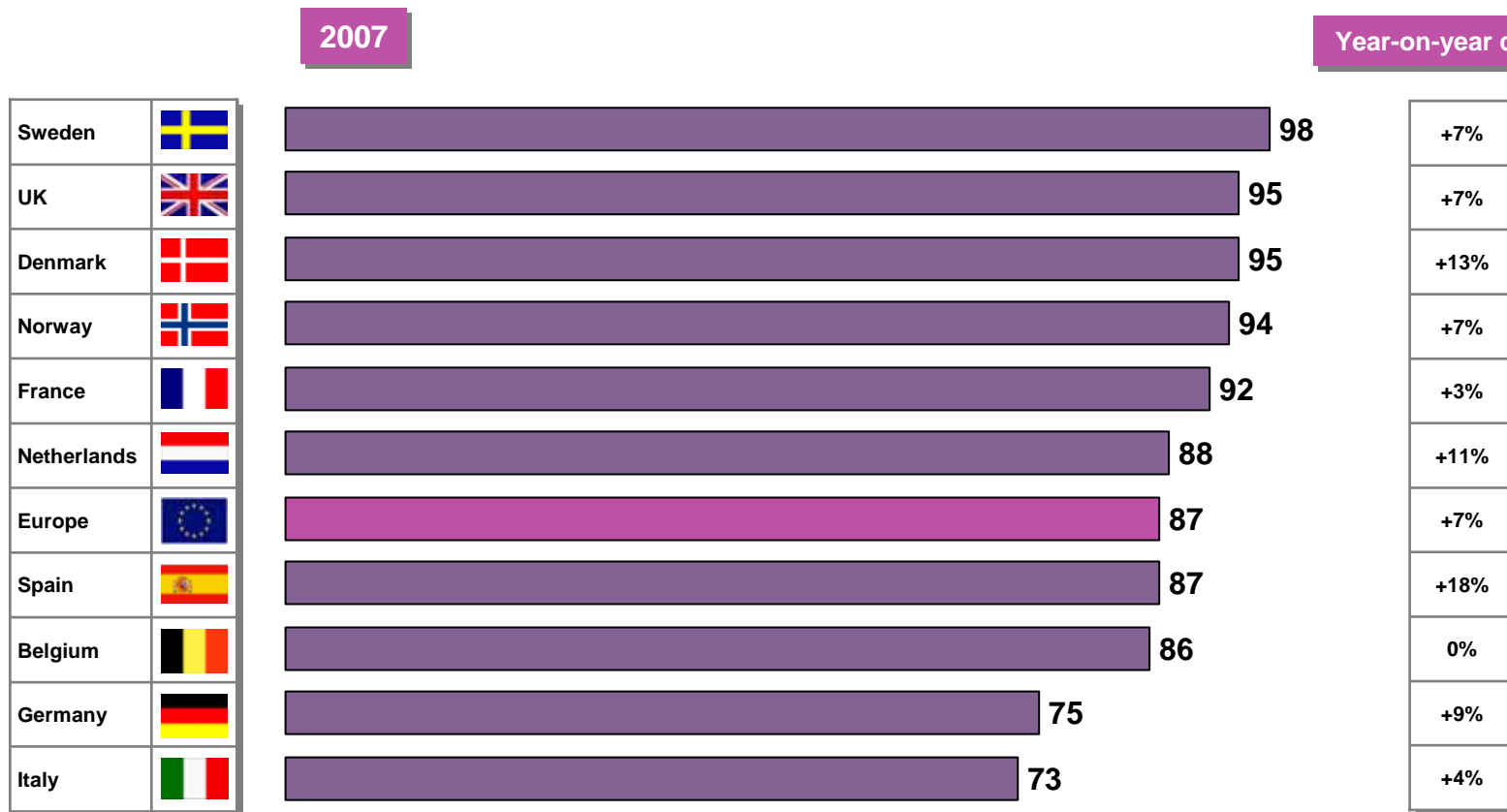


[Base: All Sports Site Users using each type of media (TV=1424, newspapers=1207, magazines=852, radio=1284, internet=1512)]

87% of sports site users use broadband at their main point of internet connection

QC3. Thinking about the place where you use the Internet the most, do you have a broadband connection?

Broadband connection - Sports Site Users



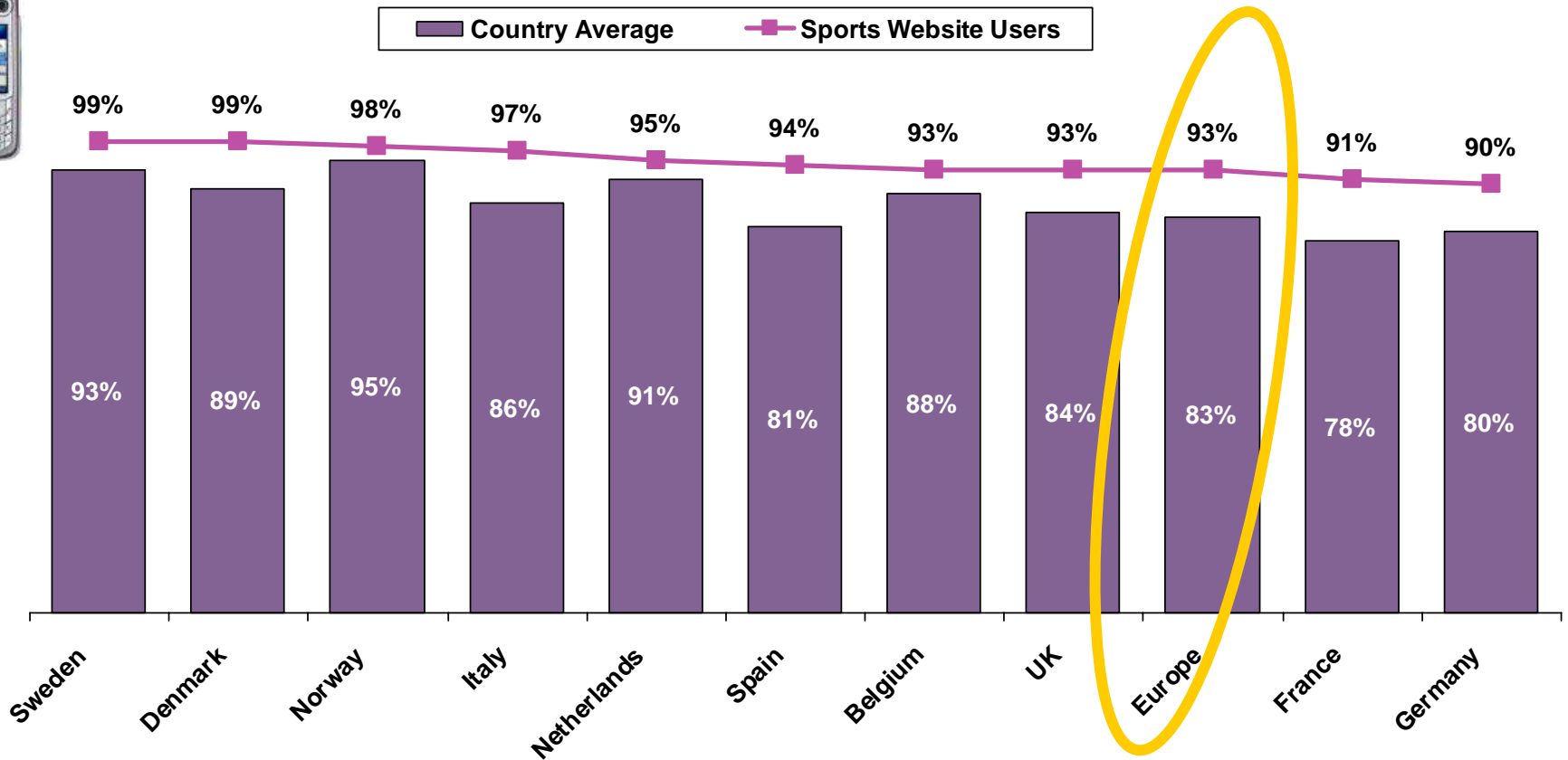
[Base: All Sports Site Users using the internet (n=1548)]

Sporting lifestyles

- 93% of sports site users own a mobile/PDA/Blackberry (vs. 83% of all Europeans) and are heavy users of mobile internet –
 - They are twice as likely as the average European mobile/PDA/Blackberry user to watch video/film clips via their mobile (12% vs. 6%) and are more likely to perform other online activities on their mobile
- Almost half (48%) of all sports site users communicate via social networking sites
- Nine out of ten sports site users (91%) own a DVD player (compared to 75% of all Europeans) and 86% have a PC in their home (vs. 64%)
- Almost three-quarters (71%) of sports site users find that the internet provides them with what they want quickly
- 57% rated internet advertising high on creativity thus marking the demographic to be a more engaged and receptive group compared to the average European internet user (51%)

93% of sports site users own a mobile/PDA/Blackberry

Q7c. Do you have a mobile phone or Blackberry/PDA?

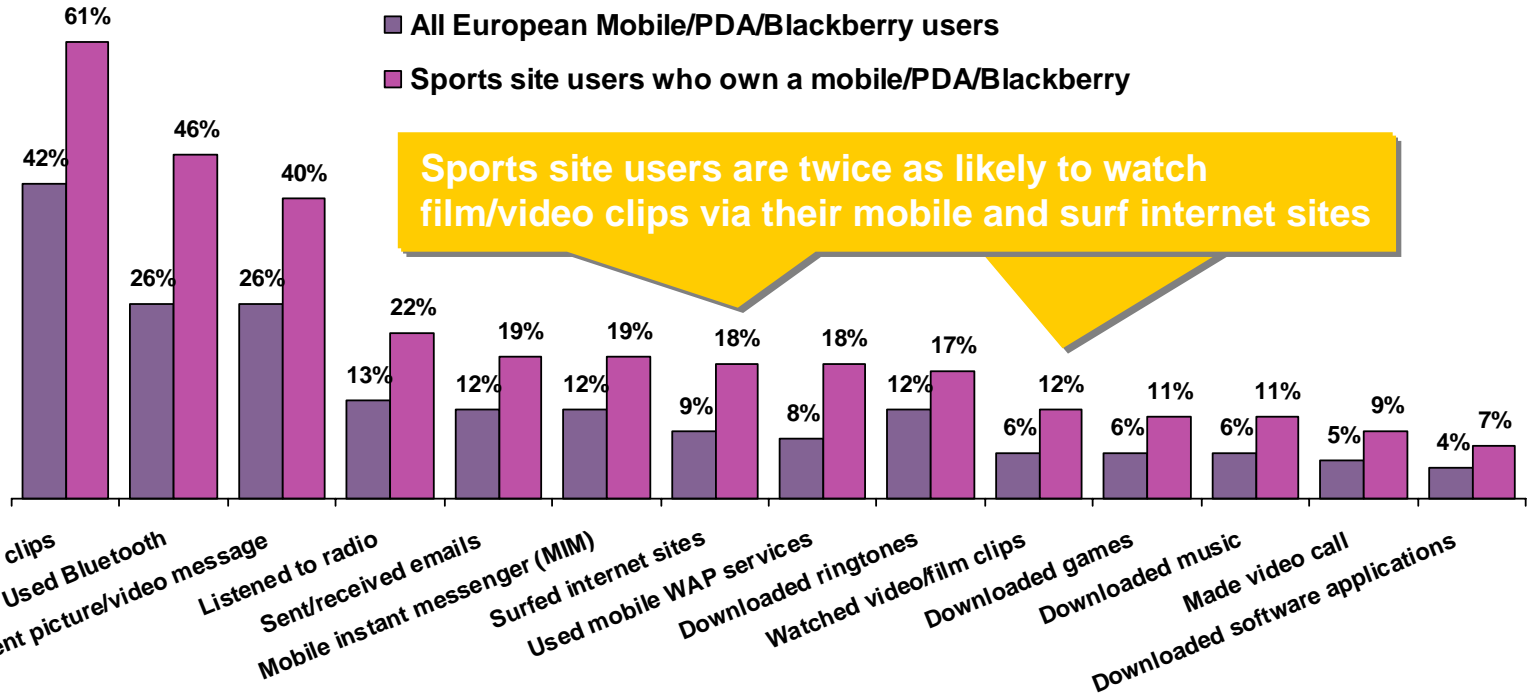


[Base: All Respondents (n=7008) and All Sports Site Users (n=1548)]

Sports site users are twice as likely as the average European user to watch video/film clips via their mobile

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

Activities undertaken



Sports site users are twice as likely to watch film/video clips via their mobile and surf internet sites

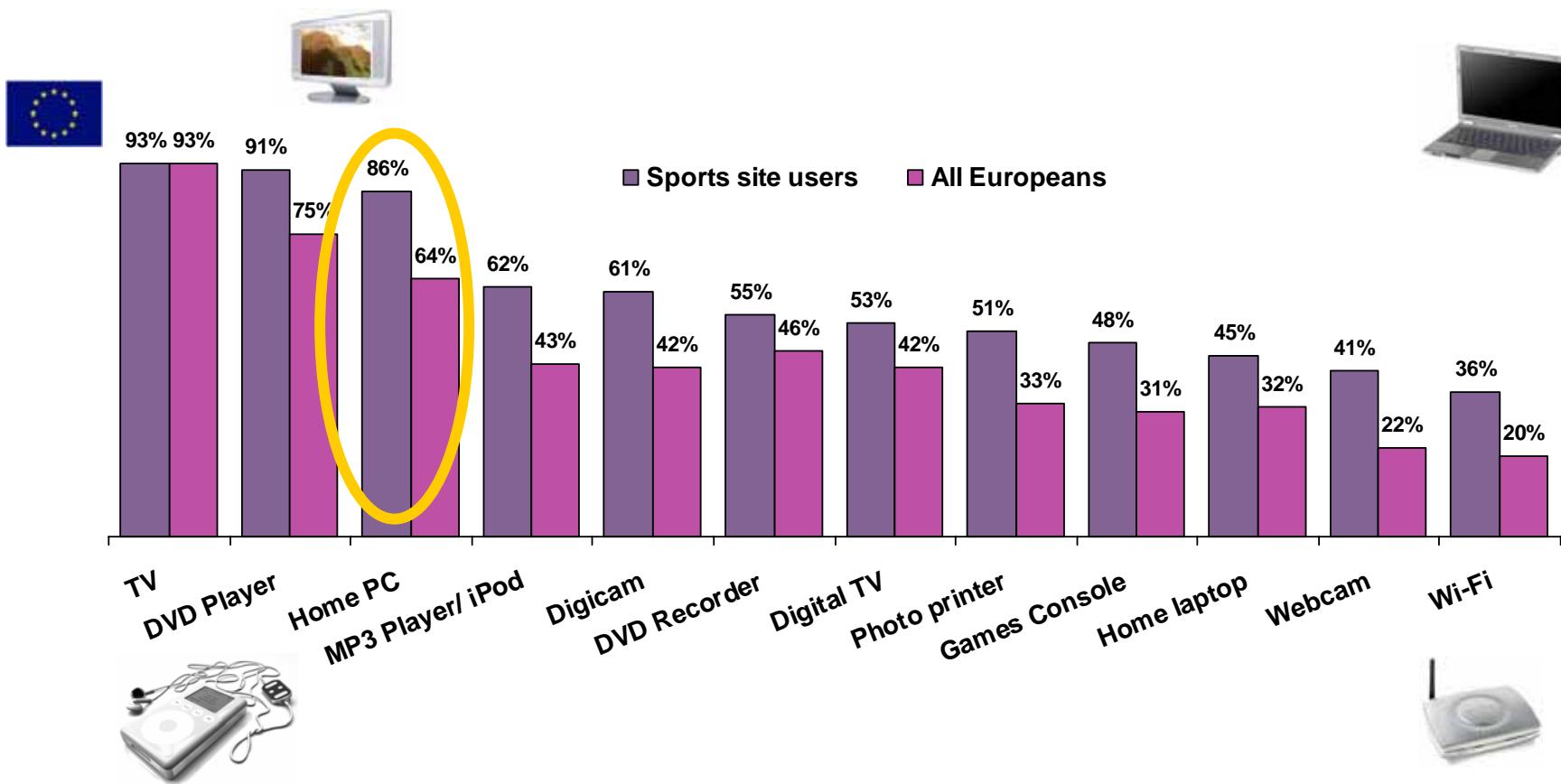
[Base: All Europe with a mobile phone or Blackberry/PDA (n=5911)]

[Base: All Sports Site Users with a mobile phone or Blackberry/PDA (n=1451)]

86% of sports site users have a PC at home vs. 64% of all Europeans

QC6. Which of the following do you have in your household?

Products in household



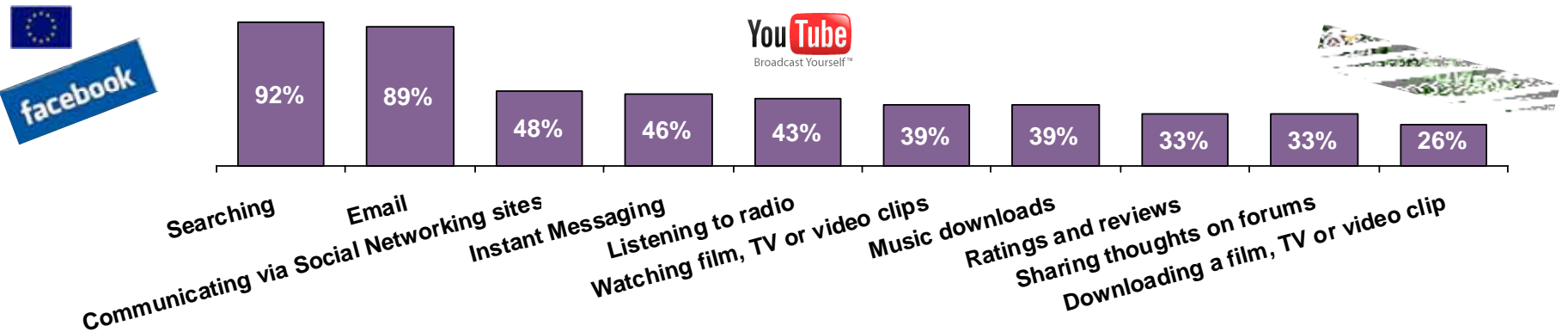
[Base: All Europe respondents (n=7008)]

[Base: All Sports Site Users respondents (n=1548)]

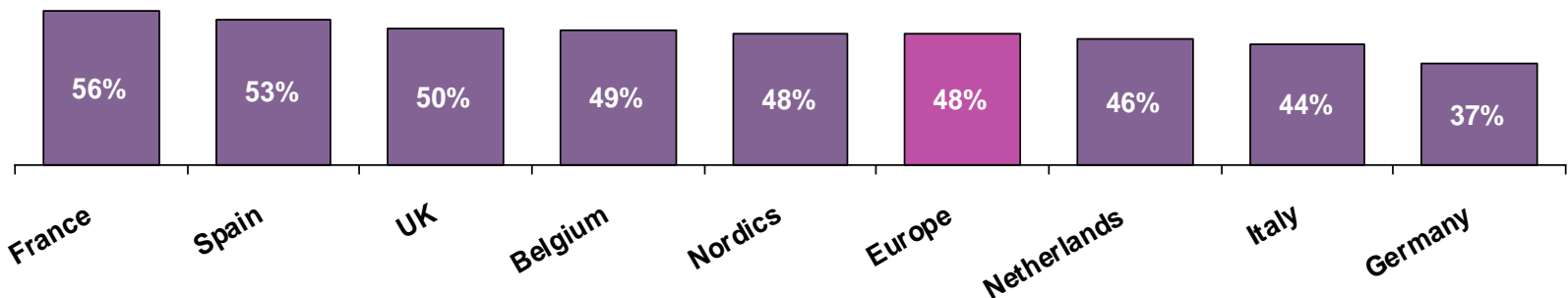
48% of sports site users communicate via social networks

Q7b. Which of the following types of web activities do you use at least once a month?

Top 10 website activities amongst all European sports site users (%)



Social networking amongst sports site users by country (%)

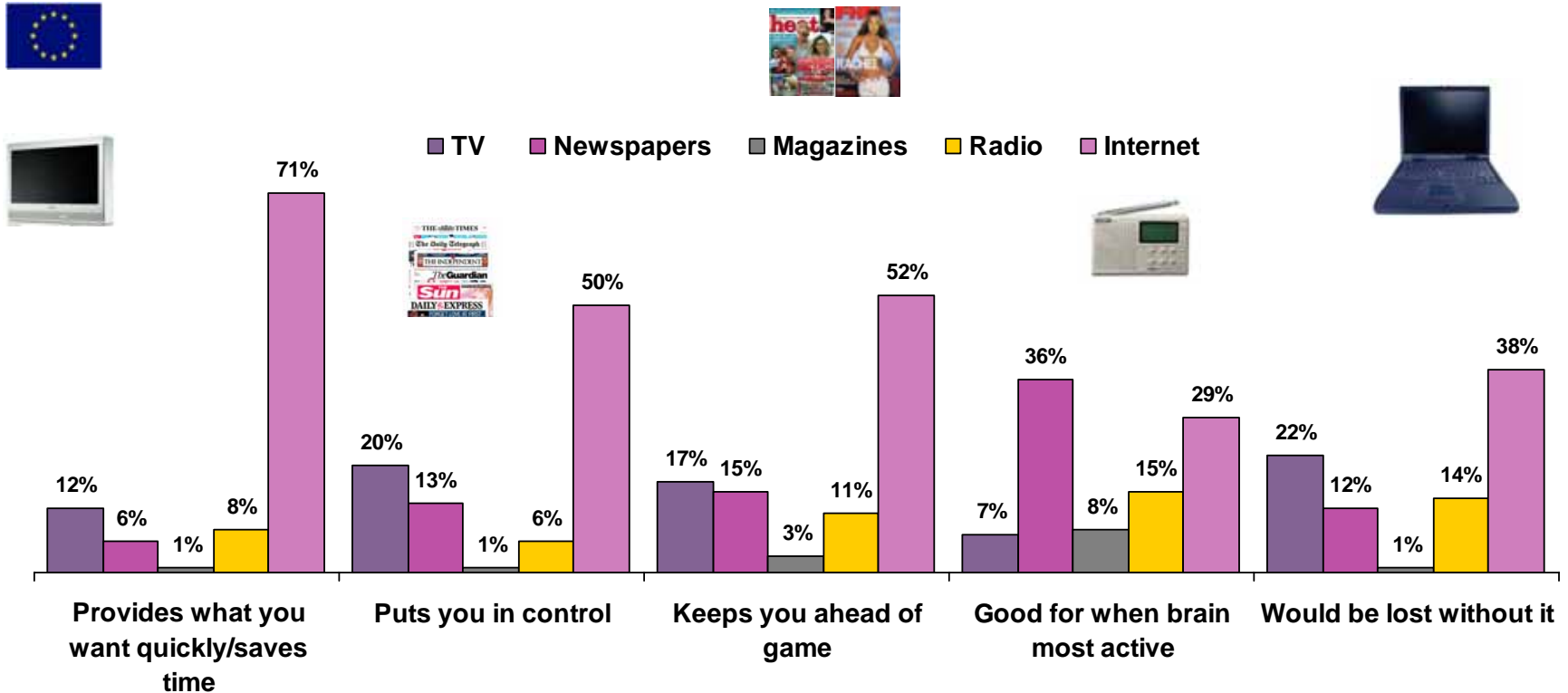


[Base: All Sports Site Users internet users (n=1548)]

71% of sports site users find the internet provides what they want quickly/saves time

Q5g. Which one type of media do you think fits best with this statement?

Sports Site Users



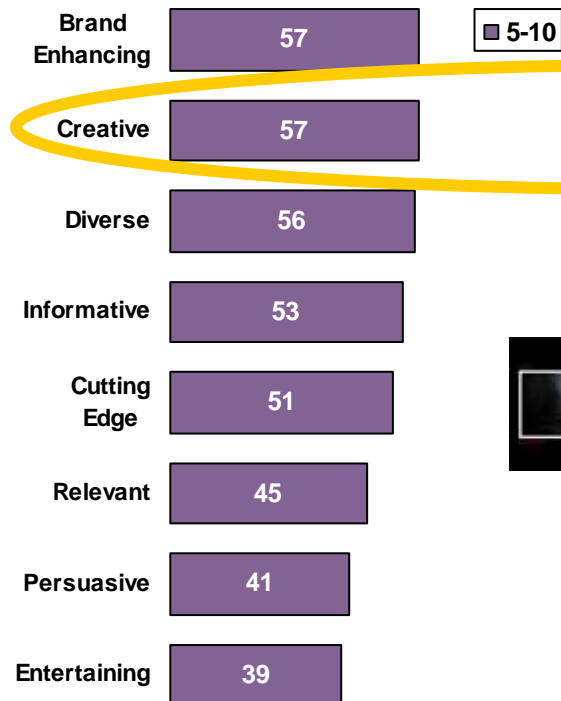
[Base: All Sports Site Users using all media types (n=752)]

57% rated internet advertising high on creativity

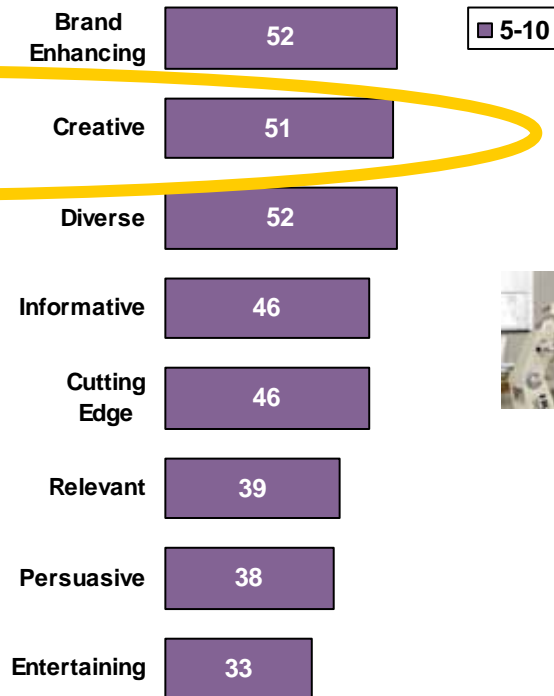
Q21b. How... do you think internet advertising is on a scale of 1-10, where 1 means not at all and 10 means extremely?



Sports site users



All internet users



[Base: All European sports site users Europe]

Key findings

- Digital media is fast becoming the medium of choice for sports fans and pushing the boundaries of media convergence across TV, internet and mobile – we can see this in the increasing simultaneous use and crossover between media:
 - 32% of sports fans use TV and internet together compared with 16% of all users
 - 73% of sports fans watch television and 68% use the internet during the peak media consumption period (5.30-9pm)
 - 39% of sports site users watch TV, film or video clips online and they are twice as likely as the average mobile/PDA/Blackberry user to watch video/film clips via their mobile (12% vs. 6%).
- Over a third (36%) of all European internet users currently visit sports sites
- Sports site users spend over 13 hours online each week, 10% more time than the average European spends online and an increase of 27% since 2004
- Brands need to work out how best to reach and interact with this sports-driven audience as it develops and it is vital that marketers create strategies to take advantage of the media opportunities surrounding key sporting events.

