



EIAA Media Consumption Study

Youth Online Results
Europe 15-24 age group

Conducted by
Millward Brown



EIAA Media Consumption Study II



- These youth online findings come from the EIAA annual survey of media consumption patterns across Europe based on consumer attitudinal data. This presentation shows the European findings.
- **Objective:**
 - Measure how consumers allocate their time across media options: TV, Radio, Newspapers, Magazines and the Internet
- **Methodology:**
 - Random telephone interviews
 - Nationally representative sample
 - 1000 respondents per country: UK, FR, DE, ES and IT
 - 500 respondents per country: Belgium, the Netherlands
 - 333 respondents per country: Denmark, Sweden, and Norway
 - Fieldwork completed September to October 2004



Cost of Increased Internet Usage



Internet users were asked which of the following do you do less often as a result of using the Internet (Q20)?

Watch TV	46%
Talk on the phone	34
Read Magazines	33
Read Books	32
Read Newspapers	28
Spend time w/Family and Friends	32
Be Outdoors	22
Listen to Music	18
Exercise	20
Listen to Radio	22
Work	14
Text messages	26

**'Cost' of Internet Usage
by Activity**

15-24 yr olds

(528)

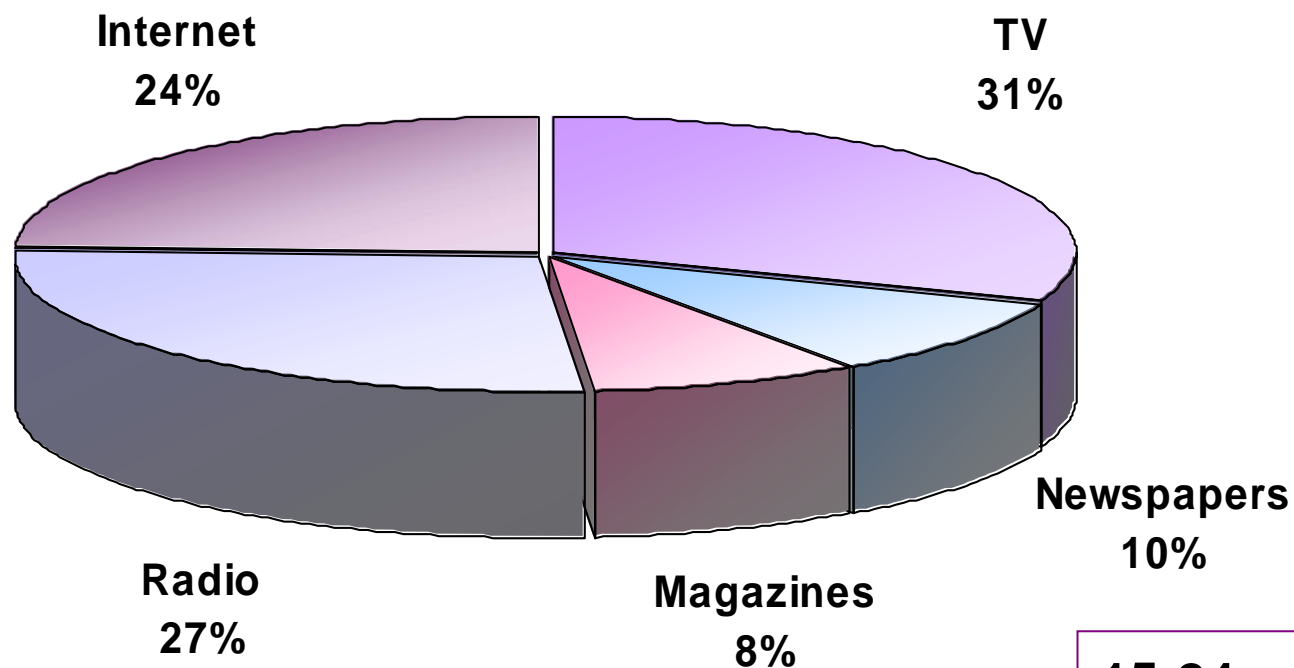
Base: Internet users





% Allocation by Media Type

% time spent by Media Type 15-24 yrs in the 10 countries studied



Base: Users of each medium - total number of media hours used per week for each media type

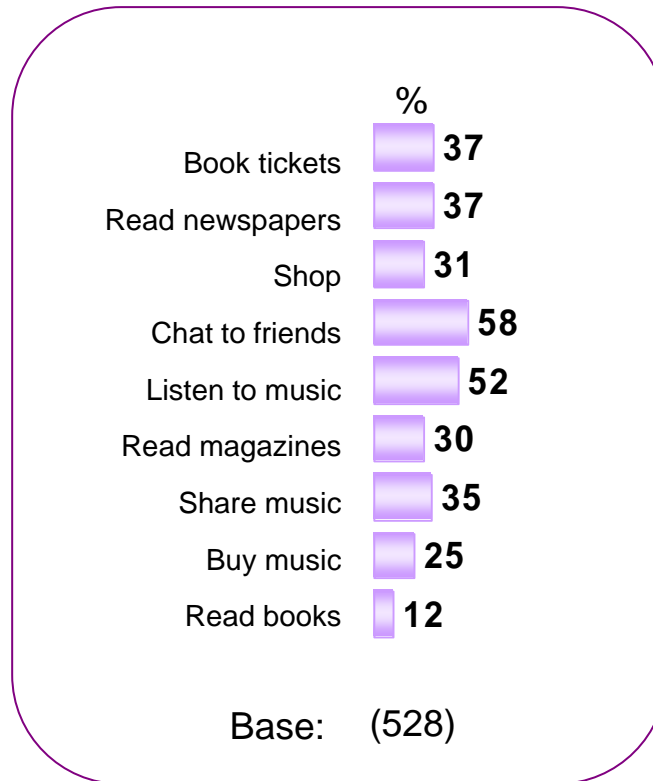
15-24 yr olds



Offline Activities Moving Online



What activities did you previously do elsewhere but now do on the internet (Q21)?



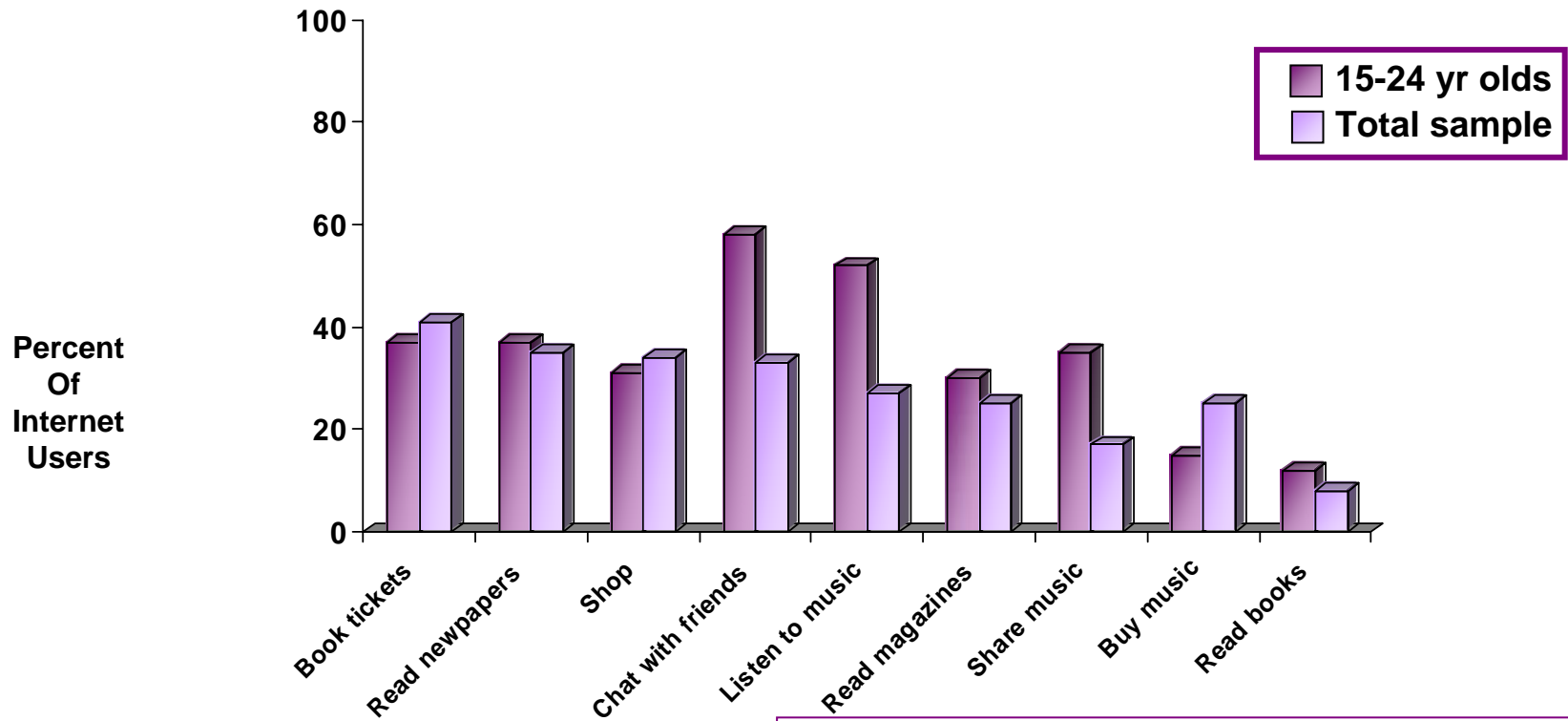
15-24 yr olds





Offline Activities Moving Online

15-24 yr olds have a much higher usage of chat and music than average



Base: Internet users

15-24 yr olds compared to total sample

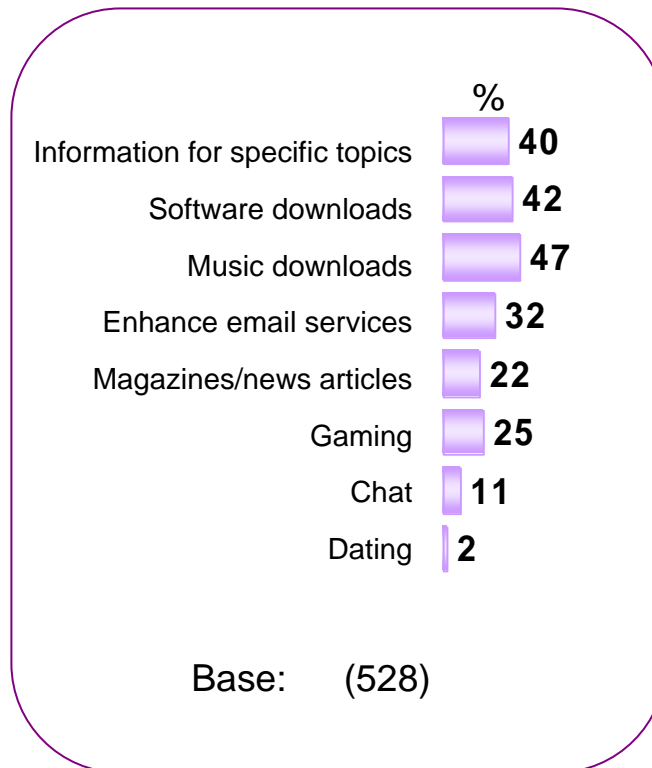


Q21) Previously did elsewhere but now do on the internet?

Premium services



Users were asked - Which online premium subscription services you would be prepared to pay for (Q.22)?



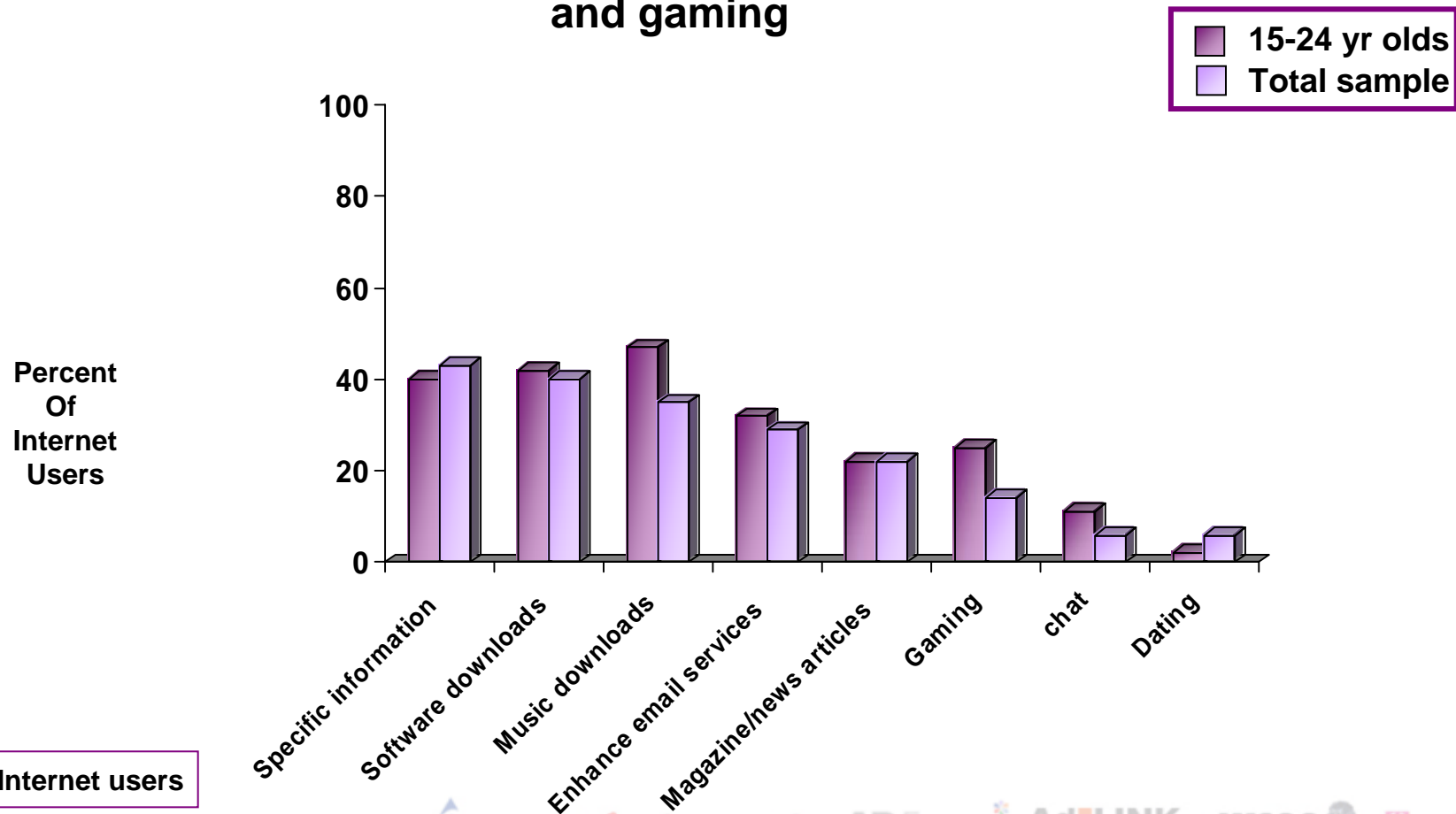
15-24 yr olds





Premium services

15-24 yr olds are more willing to pay for premium services such as music and gaming



Base: Internet users

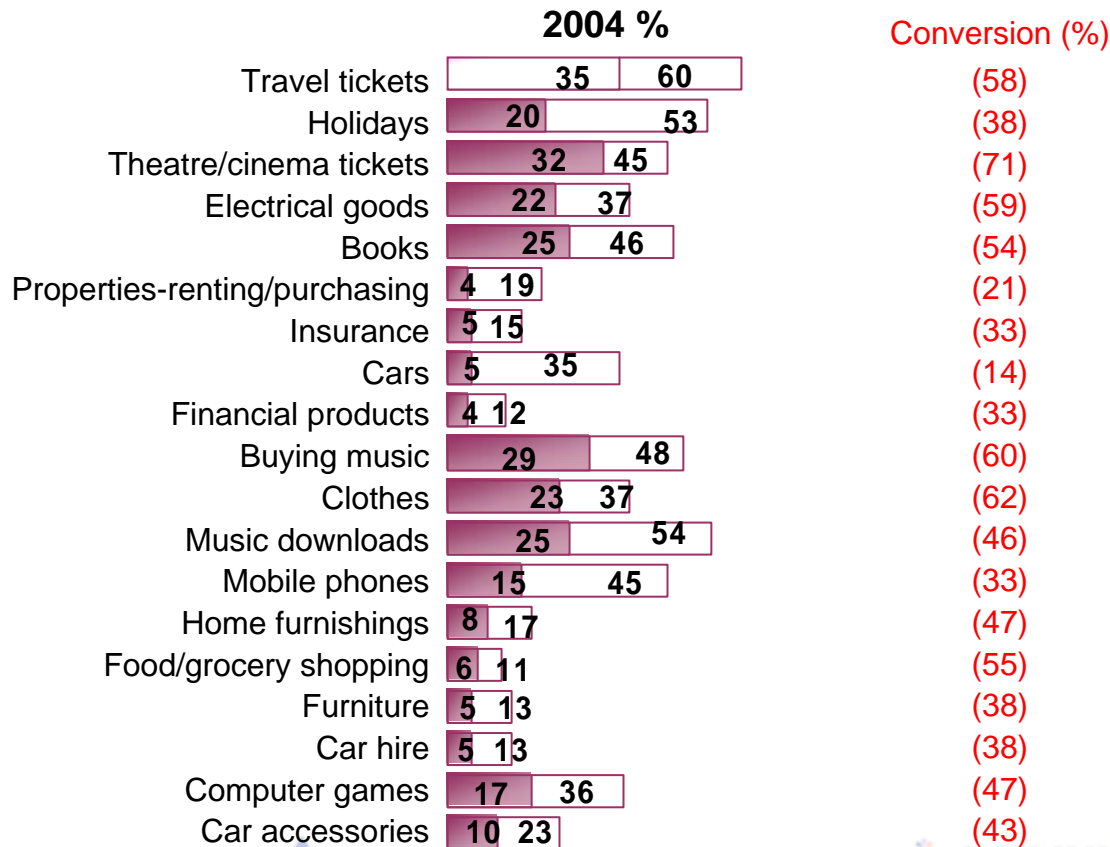


Q.22 Which online premium subscription services you would be prepared to pay for?

Browsing versus Buying



15-24 yr olds are confident in buying online



15-24 yr olds

Base: Internet Users (528)

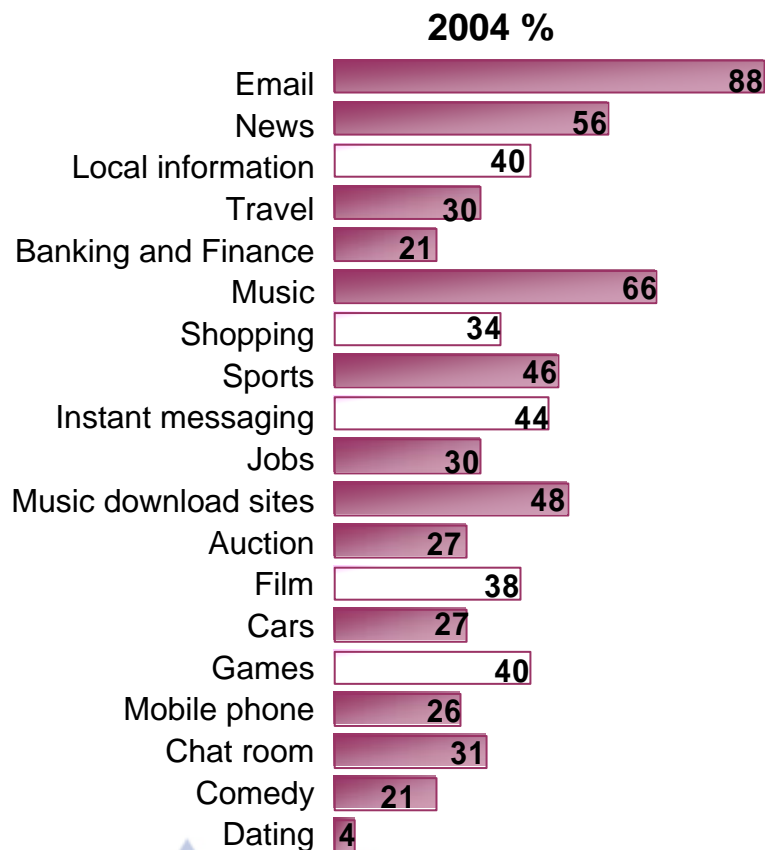


Have you ever researched into...using the internet? Have you ever bought...using the internet?

Websites/web pages visited



A broad range of websites are visited



15-24 yr olds

Base: Internet Users (528)

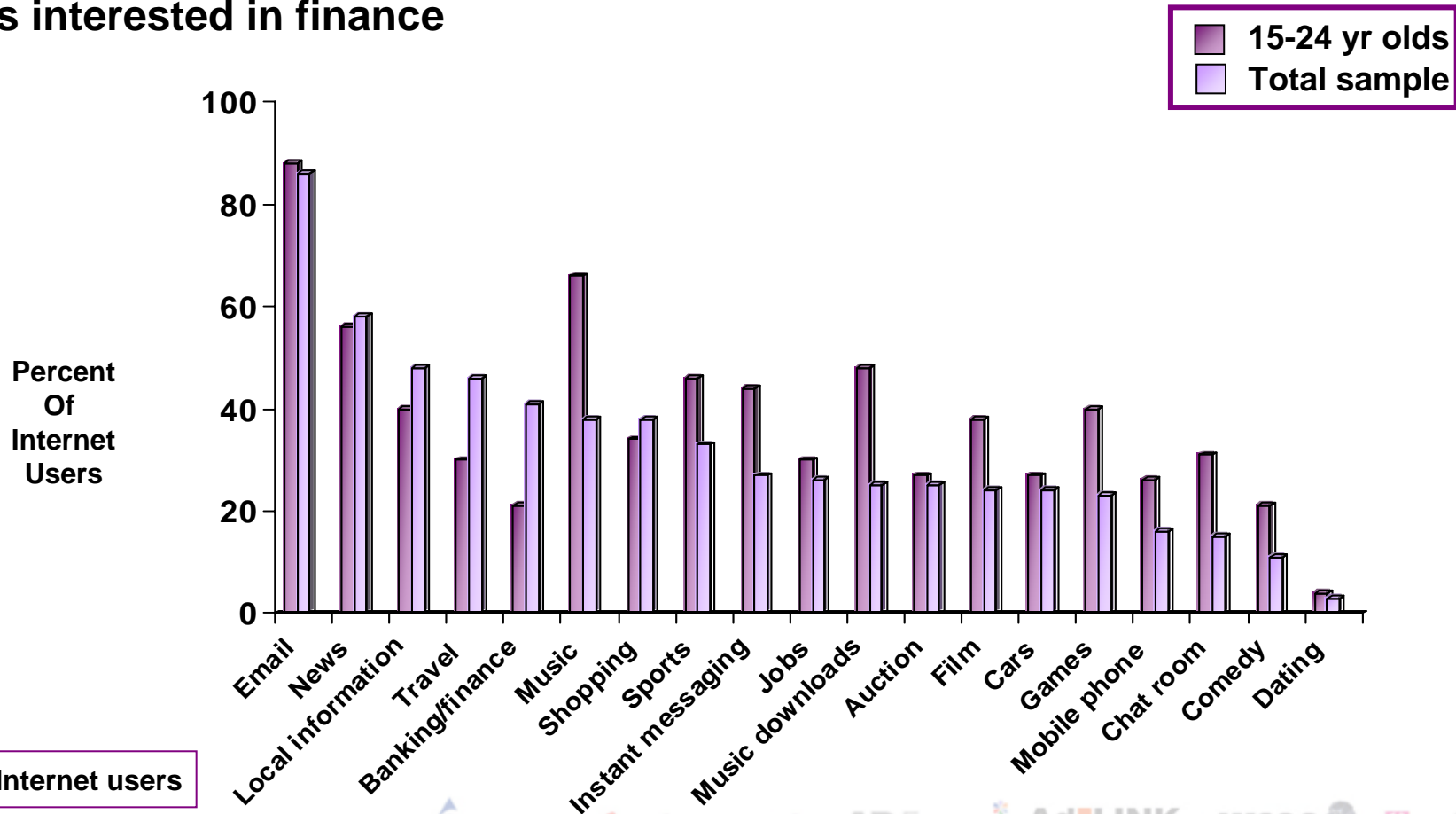


(Q16) Website/web pages visited



Website/web pages visited

15-24 yr olds are more interested in communications and entertainment, less interested in finance



Base: Internet users



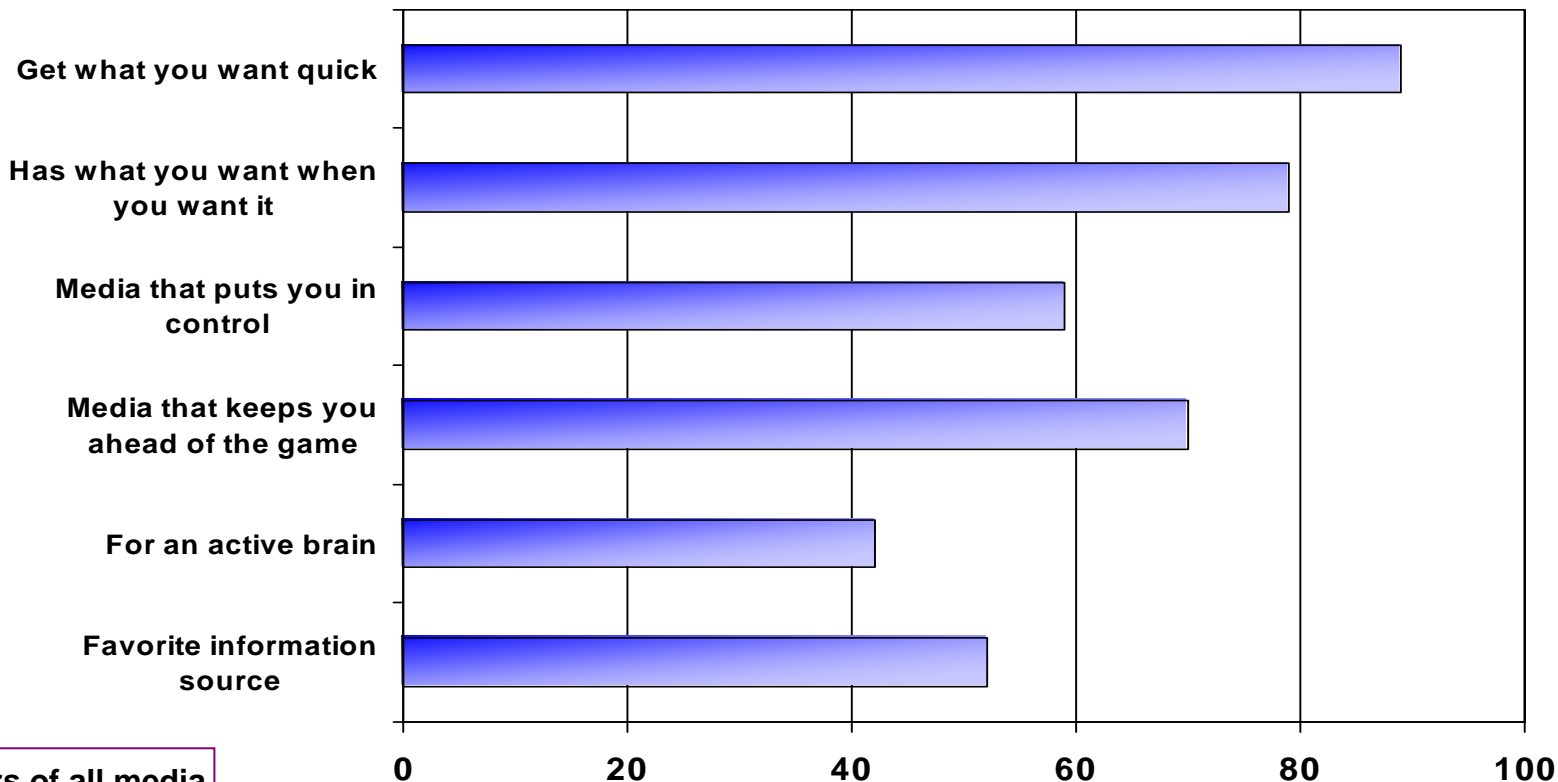
(Q16) Website/web pages visited

Strengths of the Internet



15-24 yr olds

15-24 yr olds are particularly interested in getting what they want quickly and being ahead of the game



Base: Users of all media



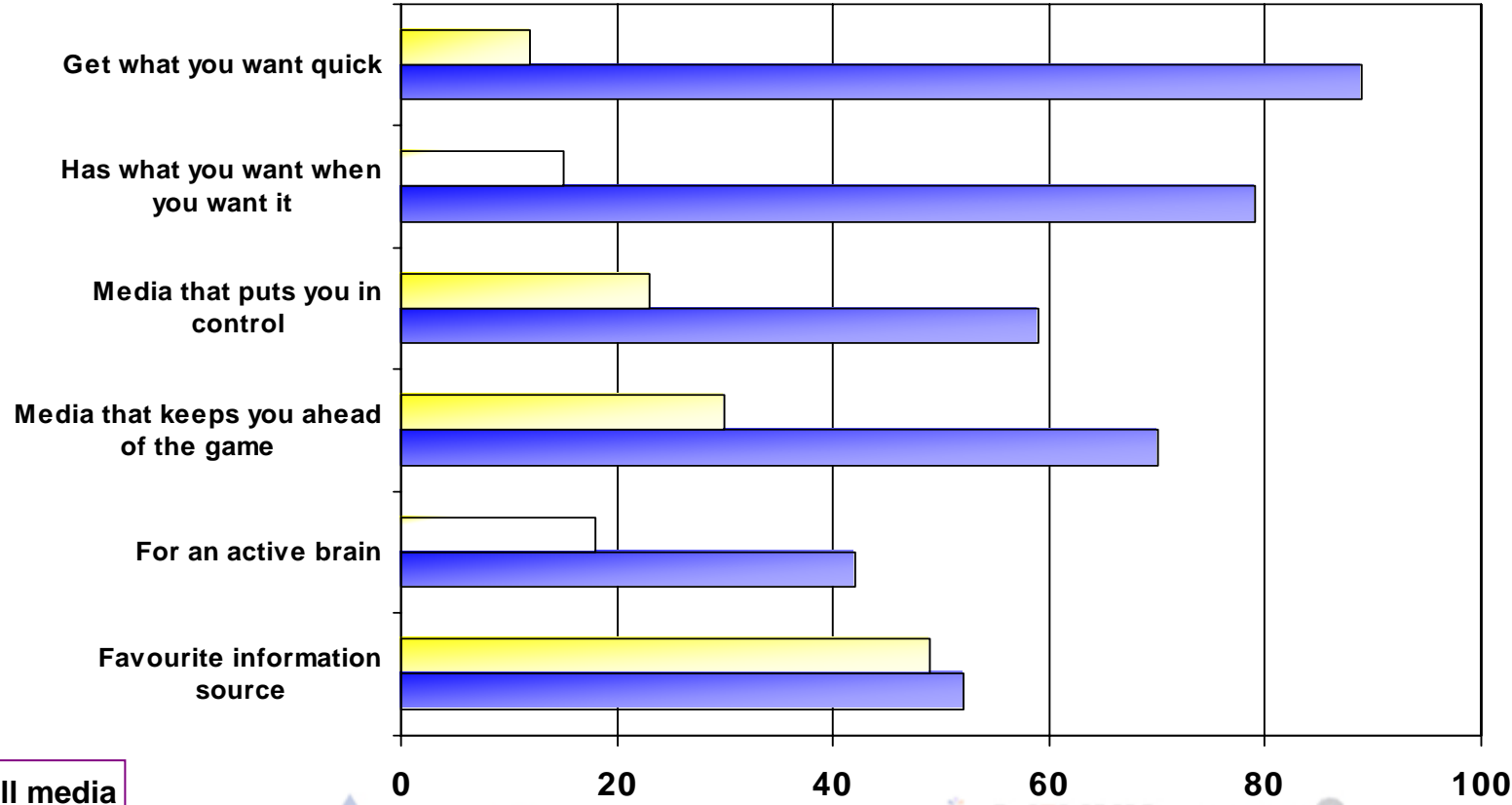
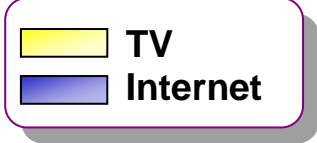
Q: Which of these media do you think...?

(187)

Internet Strengths vs. TV



15-24 yr olds



Base: Users of all media



Q: Which of these media do you think...? (187)