



EASTERN EUROPEANS EMBRACE ONLINE CONTENT AND SOCIAL NETWORKING

***Exclusive research shows significant differences in the way
Europeans use the web***

Brussels 24th February 2010: IAB Europe's extensive survey of the online behaviour and attitudes of 32,000 people in 16 markets reveals some striking differences – and similarities – in the way Europeans are using the web. Designed to support marketers understand the impact the internet continues to have on our lives in both the region as whole and its individual markets, the annual research project known as 'MCDC' (Marketers & Consumers, Digital & Connected) is a real goldmine of information. It is carried out by IAB Europe's research partner InSites Consulting.

The daily web

While internet penetration levels vary widely within Europe, from 85% in the Netherlands to 32% in Romania, the time spent and frequency of use varies very little between countries. Most internet users go online six or seven days a week (71%), with 76% going online for more than an hour on these days. With 77% accessing the internet every day, Northern Europeans are online more frequently but it is Eastern Europeans that spend longer in an average session: a third (33%) spending three hours or more per session.

Almost all internet access across Europe is via broadband, with narrowband accounting for just 3% of internet connections. Wireless connections are popular

in the home, but with significant variations: in Northern Europe, Norway boasts 63% penetration, in Southern Europe more Spanish homes are wireless at 59% and only 19% of Hungary's homes are cable free.

Web entertainment

The results show that the appetite for consuming entertainment online is huge in Eastern Europe. 49% of those surveyed in Hungary, Poland and Romania watch TV or video content online, 44% listen to the radio in real time, 31% download music and 27% game and gamble online.

Social Networking

52% of all internet users surveyed had updated or viewed a profile on a social network in the last month. As with web entertainment, the Eastern Europeans lead the way here - with 59% having viewed or updated a profile in the last month. At 65% participation is highest in Hungary, followed by Romania at 61% and Poland at 56%.

Buying and researching online

We know that e-commerce is a significant part of the web in Western and Northern Europe. 57% of all European internet users have purchased a product or service online in the last 12 months, and almost three quarters (74%) say they research information on products and services online at least once a week. But Eastern Europe is the only region where respondents are more likely to have bought an item from another internet user (27%) than from an e-commerce website (24%).

IAB Europe Head of Research, Catherine Borrel, comments "We call MCDC a goldmine because of its scale and ability to put a face on the internet user across this diverse region. The results give us a huge range of material to get under the skin of the consumer in each of the 16 markets, as well as from a pan-European view. From behaviour ranging from ecommerce to media consumption, from attitudes to privacy and advertising, MCDC helps us see how the pieces of the European online jigsaw fit together."

Additional data from MCDC

Snapshot of activities at least once a week (Europe total)

- 93% of those surveyed use a search engine at least once a week
- 89% use email at least once a week
- 79% visit an online news resource at least once a week
- 45% Use an online route planner
- 43% use chat and instant messaging
- 21% play games and gamble

Activity (at least weekly)	Most active countries	Total Europe	Least active countries
Email	98% Belgium, Denmark, Italy, Sweden	93%	84% Germany
Search	96% Belgium, Romania	89%	81% Germany
Reading news online	92% (Italy)	79%	68% Netherlands, UK
Researching brands products, services, or shops	81% (Norway)	74%	63% Greece
Online banking	90% Norway	52%	19% Romania
Route planners	57% France	45%	28% Germany

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Media please contact:

Geraldine Gitel, PR Consultant (French/English) Tel: +44 (0) 7917 885380/00 33 6772 5050
publicrelations@iabeurope.eu; ggitel@greenfieldscommunications.com

Lucy Green, PR Consultant (English) Tel: +44 (0) 7817 698366
pressrelations@iabeurope.eu; lgreen@greenfieldscommunciations.com

About MCDC

IAB Europe and research partner InSites Consulting ran MCDC (Marketers & Consumers, Digital & Connected) to understand how 32,000 Europeans in 16 countries behave online, and their attitudes to the web. With a wide range of data from e-commerce to media consumption, attitudes to advertising to privacy and personal data protection, it is a goldmine of information, highlighting

similarities and differences across the markets surveyed. The 16 countries covered in MCDC are: Belgium, Denmark, Finland, France, Germany, Greece, Hungary, Italy, the Netherlands, Norway, Poland, Romania, Spain, Sweden, Switzerland and the UK. There's more information online: <http://www.iabeurope.eu/research-and-benchmarking/mc-dc.aspx>

About IAB Europe

IAB Europe is a federation of national Interactive Advertising Bureaux (IAB) across Europe. Its mission is to promote the growth of the interactive advertising markets on behalf of its clients and national members. Supported by every major media group, advertisers, agency, portal, technology and service provider, its voice represents the interest of more than 5000 company members. IAB Europe coordinates activities across the region including public affairs, benchmarking, research, setting standards and best practices. The member countries are Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Slovenia, Spain, Sweden, Switzerland, Turkey and the UK. Our corporate members include Adobe, Alcatel-Lucent, BBC.com, CNN, comScore Europe, Ernst & Young, Fox Interactive Media, Gemius, Goldbach Media Group, Google, Hi-Media-AdLink, InSites Consulting, Koan, Microsoft Europe, Netlog, News Corporation, Nugg.ad, Nielsen Online, Orange Advertising Network, Publicitas Europe, Right Media Truvo, United Internet Media, Yahoo! and Zanox. www.iabeurope.eu