

## EIAA Digital Families 2008

### Executive Summary

#### **Digital Families 2008**

The EIAA Digital Families 2008 report forms part of the ongoing Mediascope Europe Study. Now in its fifth year, Mediascope Europe is one of the most comprehensive pieces of research available looking at how people consume media and how they use the internet for content, communication and commerce.

#### **Summary**

##### **FAMILY TIME ONLINE**

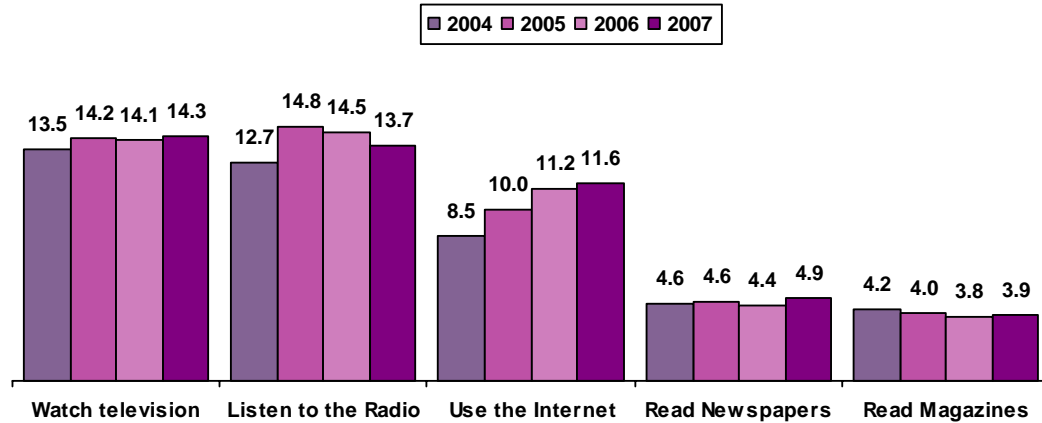
- The research shows that almost three-quarters (73%) of people living with children are logging on to the internet each week, compared with only half (52%) of those without:

Country	People living with children	People not living with children
Sweden	96%	66%
Norway	93%	72%
Netherlands	92%	79%
Denmark	86%	70%
UK	81%	58%
Belgium	79%	63%
Germany	78%	60%
France	77%	51%
<b>European Average</b>	<b>73%</b>	<b>52%</b>
Spain	64%	46%
Italy	48%	35%

[Base: All People with Children (n=2400) and all people not living with children (3208)]

- Digital families are also more likely than those households without children to use the internet at the weekends (58% vs. 40%)
- Overall, these digital parents are ramping up their web time, spending 11.6 hours online each week (up 36% since 2004):

## Time spent by media 2004 - 2007



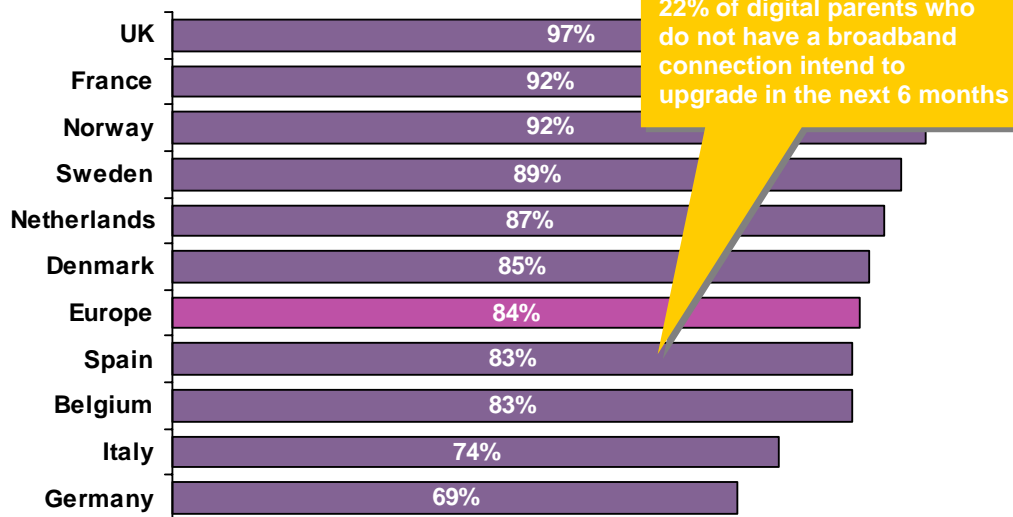
[Base: All People with Children using each media (TV=2268, radio=1895, internet=1812, newspapers=1755, magazines=1338)]

- Over a quarter of all digital parents are heavy users of the internet (27%):

## INFLUENCING ENTERTAINMENT

- 84% of digital parents use broadband at their main point of internet connection and 22% of those who do not have broadband intent to upgrade in the next 8 months:

### % who use broadband at main point of internet connection



[Base: All People with Children using the internet (n=1812)]

- Almost a third (30%) of digital parents are watching film, TV or video clips online, demonstrating how entertainment is becoming integral to the family internet experience. It's an activity which is growing enormously in popularity (+150% since 2006):

Top 5 web activities in terms of growth	2007	2006	Year-on-year growth
Watching TV, film or video clips	30%	12%	+150%
Ratings and reviews	28%	20%	+40%
Creating and sharing content	19%	15%	+27%
TV & Film video downloads	21%	17%	+24%
Making telephone calls	18%	15%	+20%

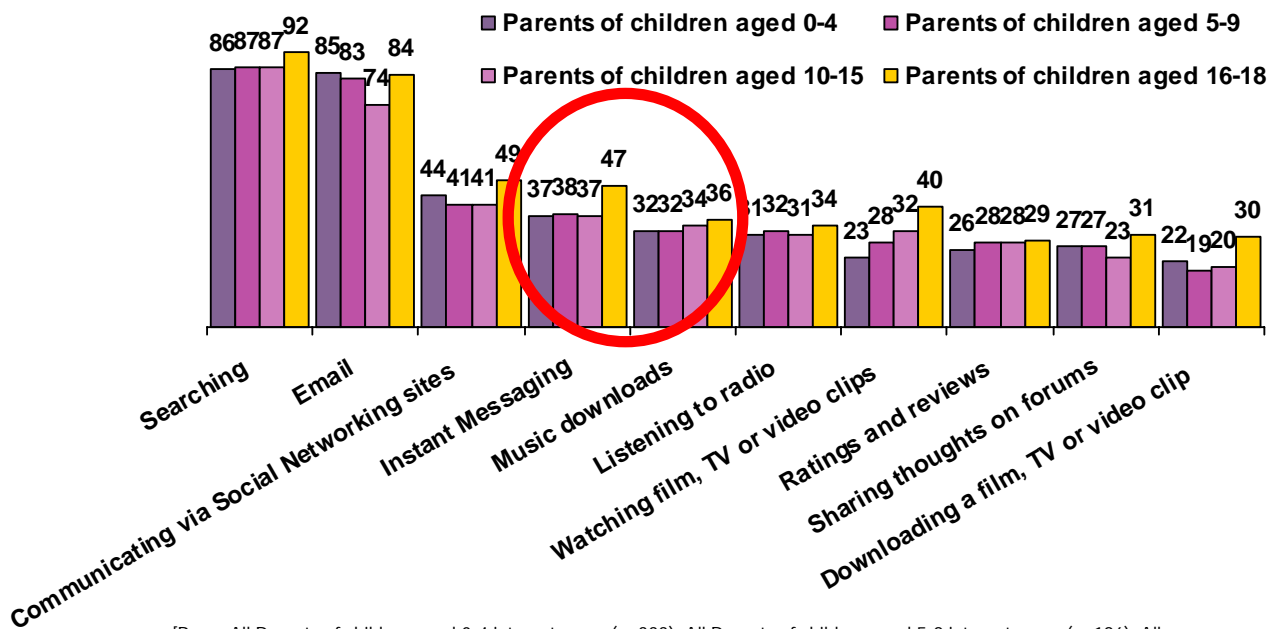
[Base: All People with Children using the internet (n=1812)]

- As you can see digital parents are also using the internet to express themselves more and to interact with others. Web activities such as ratings and reviews and creating and sharing content have experienced a significant boost since 2006 (+40% and +27% respectively):
- 32% of digital parents listen to the radio online and 66% now regularly use the internet as a source of news – showing how broadcast and other traditional media are increasingly being consumed online.

## AGE MATTERS

- The research also shows that the websites visited by digital parents and their online activities vary according to the age of the children:
  - People living with very young children (between nought and four) are increasingly visiting health and film websites (+24% since 2006)
  - Those living with children between five and nine are going to games sites (+32%)
  - Price comparison sites are seeing a boost amongst those living with children between ten and fifteen (+31%)
  - Those with older children (between 16 and 18) are enjoying more TV sites (+77%)
- Users living with older children also seem to be more technically advanced – almost half (47%) of those living with children aged 16-18 use instant messaging services compared to 37% of people living with children aged nought to four:

**% who perform each web activity**



[Base: All Parents of children aged 0-4 internet users (n=333), All Parents of children aged 5-9 internet users (n=196), All Parents of children aged 10-15 internet users (n=382), All Parents of children aged 16-18 internet users (n=246)]

**GADGETS AND GAMES**

- The study demonstrates that people living with children are more technologically aware and advanced due to their heightened experience of, and exposure to, gadgets and gizmos – 82% have a home PC vs. 62% of those living without children:

Technology in the home	People living with children	People living without children
Home PC	82%	62%
MP3 player/iPod	62%	38%
Digicam	58%	40%
Webcam	34%	19%
Games Console	54%	23%
Wi-Fi	28%	19%
Home laptop	38%	32%
Mobile phone, PDA or blackberry	91%	83%

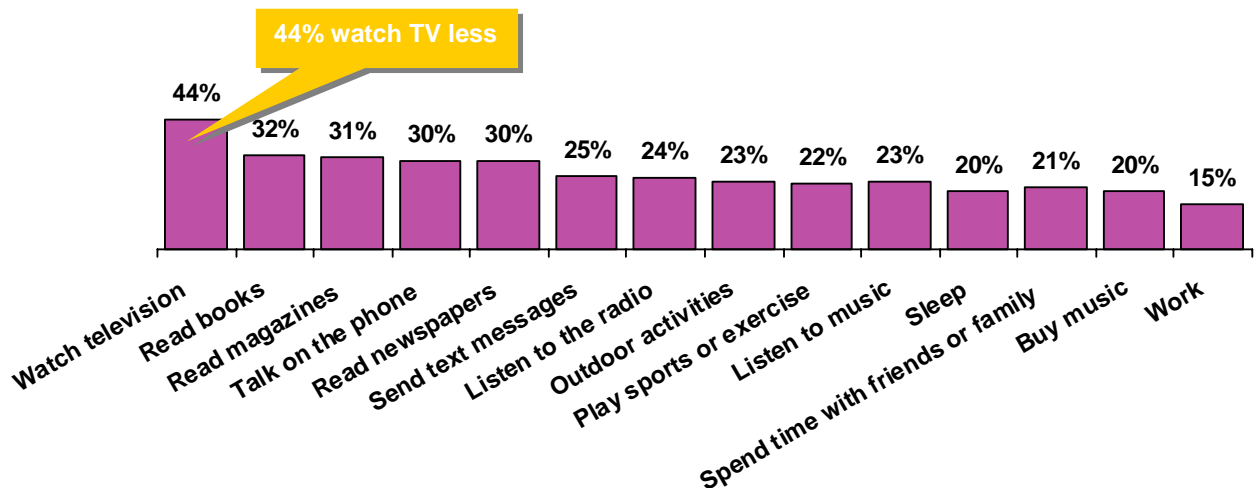
[Base: All People with Children (n=2400) and all people not living with children (3208)]

- People living with children are also more likely than those without to use a mobile phone, PDA or blackberry (91% vs. 83%) and to actively engage in a wide range of mobile phone functions - further indicating the influence of youth on technical skill and openness to adopt:
  - More than half (53%) have taken a photo or video clip (vs. 37% of those without children)
  - 12% have surfed internet sites (vs. 9%)
  - 8% have watched video or film clips on their mobiles (vs. 5%)

## MEDIA CHOICES

- Increased online activity has meant that digital families are consuming other media less as a result of the internet –
  - 44% of digital parents are watching less TV
  - Almost a third read fewer magazines and newspapers (31% and 30% respectively)
  - Almost a quarter (24%) listen to the radio less

### Activities digital parents do less as a result of the internet



[Base: All People with Children using the internet (n=1812)]

- Time-pressured adults living with children find the web provides what they want quickly and saves them time (76% vs. 68% of people without children) while almost half (47%) believe it puts them in control (vs. 42%):

Country	People living with children	People not living with children
Provides what you want quickly/saves time	76%	68%
Puts you in control	47%	42%
Keeps you ahead of game	48%	50%
Good for when brain most active	31%	30%
Would be lost without it	36%	32%

[Base: people living with children who use all media (813) and people not living with children who use all media (760)]

## KEY MESSAGES

- Digital parents are developing a deeper engagement with online content than those that don't live with children. They are engaging in a wider range of digital activities and extending the depth and complexity of their experience. This increases the opportunities for brands to engage with their audience online and means that marketers must develop targeted and effective online strategies to appeal to today's online families
- People living with children are increasingly embracing the internet. Substantially more people who live with children log on to the internet each week than those who do not live with children (73% vs. 52%) and the amount of time these digital parents spend online is increasing (11.6 hours online each week, a 36% increase since 2004 – outpacing the growth of those living without children)
- Digital parents are increasingly turning to the web for entertainment. They are viewing more film, TV and video clips online (30% - a growth of 150% since 2006) and a large proportion now listen to the radio online. With broadband usage growing amongst this demographic, this trend looks set to continue
- People who live with children are more technically aware and advanced than those without children due to their increased exposure to, and experience of, technologies. For example, 82% of digital parents have a home PC compared to 62% of those living without children
- The websites visited by digital parents and online activities of those that live with children vary according to the age of the children. Advertisers should be aware of these differences in order to outreach effectively to their target market

## **METHODOLOGY**

The **EIAA Mediascope Europe 2007** study, which was managed by SPA and conducted by Synovate, involved 7,008 random telephone interviews with over 1,000 respondents in the UK, Germany, France, Spain, Italy and the Nordics respectively and 500 respondents in Belgium and the Netherlands respectively. Interviews were conducted throughout September 2007.

For more information please go to [www.eiaa.net](http://www.eiaa.net) or email [info@eiaa.net](mailto:info@eiaa.net)

If you are an agency or advertiser requiring a more detailed presentation of this data please contact [afennah@eiaa.net](mailto:afennah@eiaa.net)

## **ABOUT THE EIAA**

The European Interactive Advertising Association ([www.eiaa.net](http://www.eiaa.net)) is a unique pan-European trade organisation for sellers of interactive media. The primary objectives of the EIAA are to champion and to improve the understanding of the value of online advertising as a medium, to grow the European interactive advertising market by proving its effectiveness, thus increasing its share of total advertising investment. Its members are currently AD Europe, AdLINK Group, AOL Europe, Microsoft Digital Advertising Solutions, Tiscali, Yahoo! Europe, LYCOS Network Europe, Atlas & DRIVEpm, Doubleclick, wunderloop, MTV Networks International and PREMIUM PUBLISHERS ONLINE. It is chaired by Michael Kleindl, Managing Partner of Valkiria Network. The EIAA members' networks account for over 80% of the European online audience.