



Mediascope Europe

Silver Surfers Closing the Digital Divide Bulletin

April 2013

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 sixth bulletin brings you an analysis of adults aged 55+ media usage habits.

It will demonstrate how Europe's Silver Surfers are closing the digital divide between age groups.

The data comes from IAB Europe's Mediascope study. Further information on methodology can be found at:

<http://www.iabeurope.eu/research/mediascope-europe/about-mediascope.aspx>

Key findings

1. Adults 55+ media use
2. Silver Surfers' use of the internet
3. Using online to communicate and empower
4. Silver Surfers engage with brands online and embrace ecommerce
5. Silver Surfers connecting via mobile phones

1. Adults 55+ media use



36% of adults
55+ go online
(compared to **65%** total EU
adults)

74.3m adults 55+
go online

Adults 55+ media penetration...

97% of adults 55+ watch TV
(EU 95%)



67% read newspapers
(EU 62%)



36% go online
(EU 65%)



63% listen to the radio
(EU 64%)



50% read magazines
(EU 48%)



Adults 55+ spend almost three times as much time online as they do reading newspapers...



19.5 hours a week watching TV (EU 16.8)



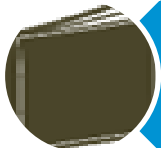
10.4 hours a week online (EU 14.8)



14.0 hours listening to radio (EU 12.7)



5.6 hours reading newspapers (EU 4.6)



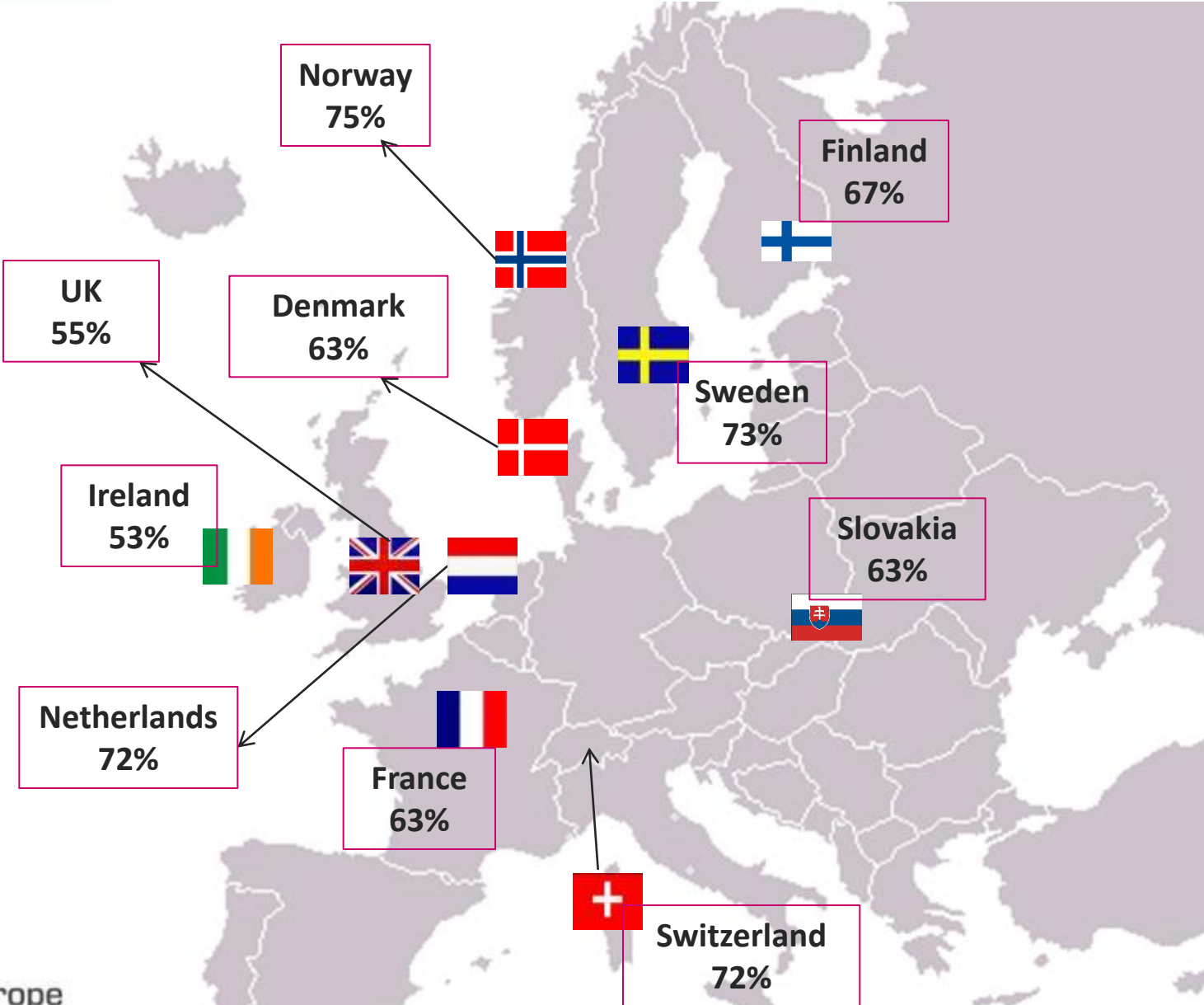
4.4 hours reading magazines (EU 4.0)

Silver Surfers' time online has increased 39% since 2004

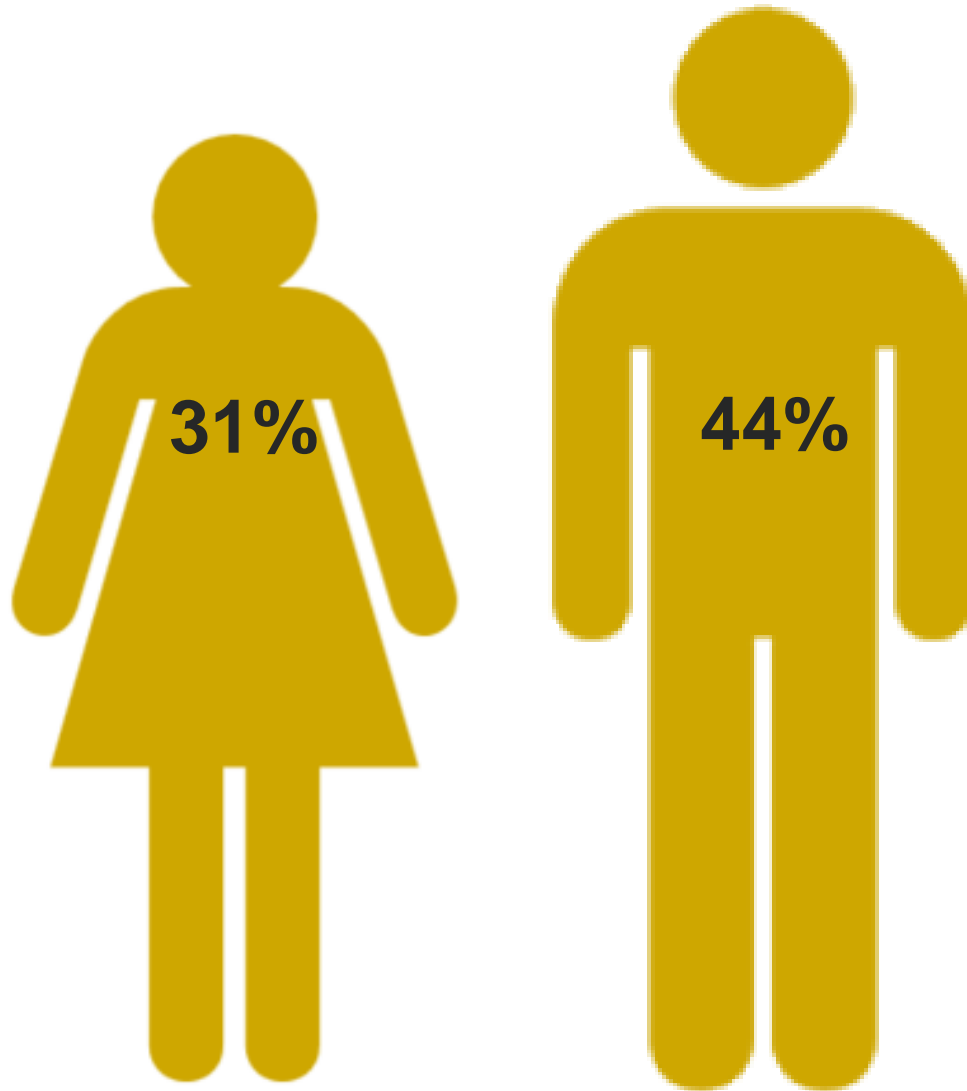


(Hours spent online in a 7 day week)

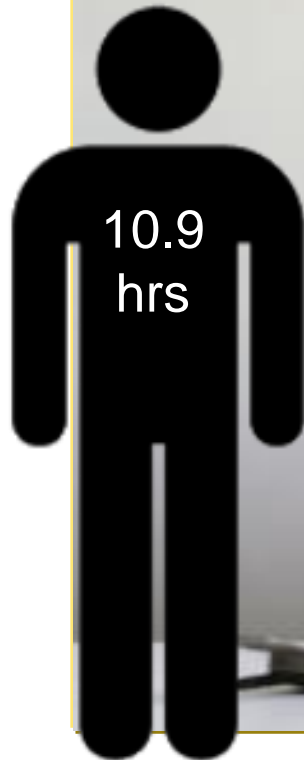
In some countries three quarters of 55+ go online



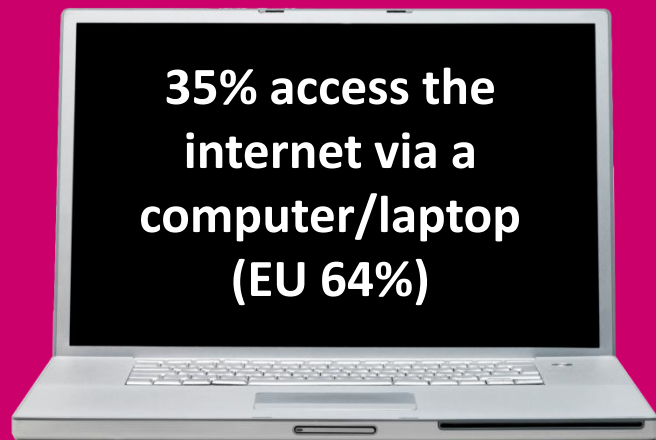
There are more 55+ men online than women...




...and they spend **more time**
online than women



Computer is device of choice of adults 55+...





70% of adults 55+
are online **during TV**
prime time

2. Silver Surfers' use of the internet

Silver Surfers' traditional media consumption is moving online...

77% visit news sites
(EU 78%)



34% watch TV online
(EU 49%)

31% listen to the
radio online
(EU 41%)

31% watch live events
online (EU 36%)

29% watch films
online
(EU 44%)

29% listen to music
online
(EU 42%)

Online activities carried out NET daily/weekly/monthly
Site types visit NET daily/weekly/monthly

Internet helps Silver Surfers across many aspects of their lives...

50% say they are able to choose better products/services since going online
(EU 51%)

45% book holidays/ make travel arrangements more easily
(EU 43%)

50% access local government information
(EU 39%)

46% manage finances better
M55+ 52%; W55+ 37%
(EU 44%)

66% keep in touch with friends & relatives
W55+ 75%; M55+ 61%
(EU 63%)

25% more able to manage health
(EU 24%)



3. Using online to communicate and empower

Internet is important for communication for Silver Surfers...

66% say they are more able to keep in touch with friends and family since going online (EU 62%)
W55+ 75%; M55+ 61%

94% use email monthly (EU 93%)
79% daily

60% use personal social networks monthly (EU 70%)
37% daily

36% make telephone calls via Skype or ISP monthly (EU 38%)
9% daily

45% use instant messaging monthly (EU 54%)
19% daily



4. Silver Surfers engage with brands online and embrace ecommerce

Internet important to Silver Surfers when choosing a brand...

1. Travel tickets 55%
(EU 59%)

2. Electrical goods 54%
(EU 57%)

3. Holidays 48%
(EU 54%)

4. Financial products 43%
(EU 48%)

5. Mobiles/contracts 40%
(EU 51%)

6. Insurance 37%
(EU 41%)

7. Cars 34%
(EU 43%)

8. Clothes & access. 31%
(EU 43%)

9. Health 29%
(EU 35%)

11. Home furnishings 28%
(EU 35%)



NET important when choosing a brand

5. Silver Surfers connecting via mobile phones

Male Silver Surfers are more likely to own a smartphone...



58%

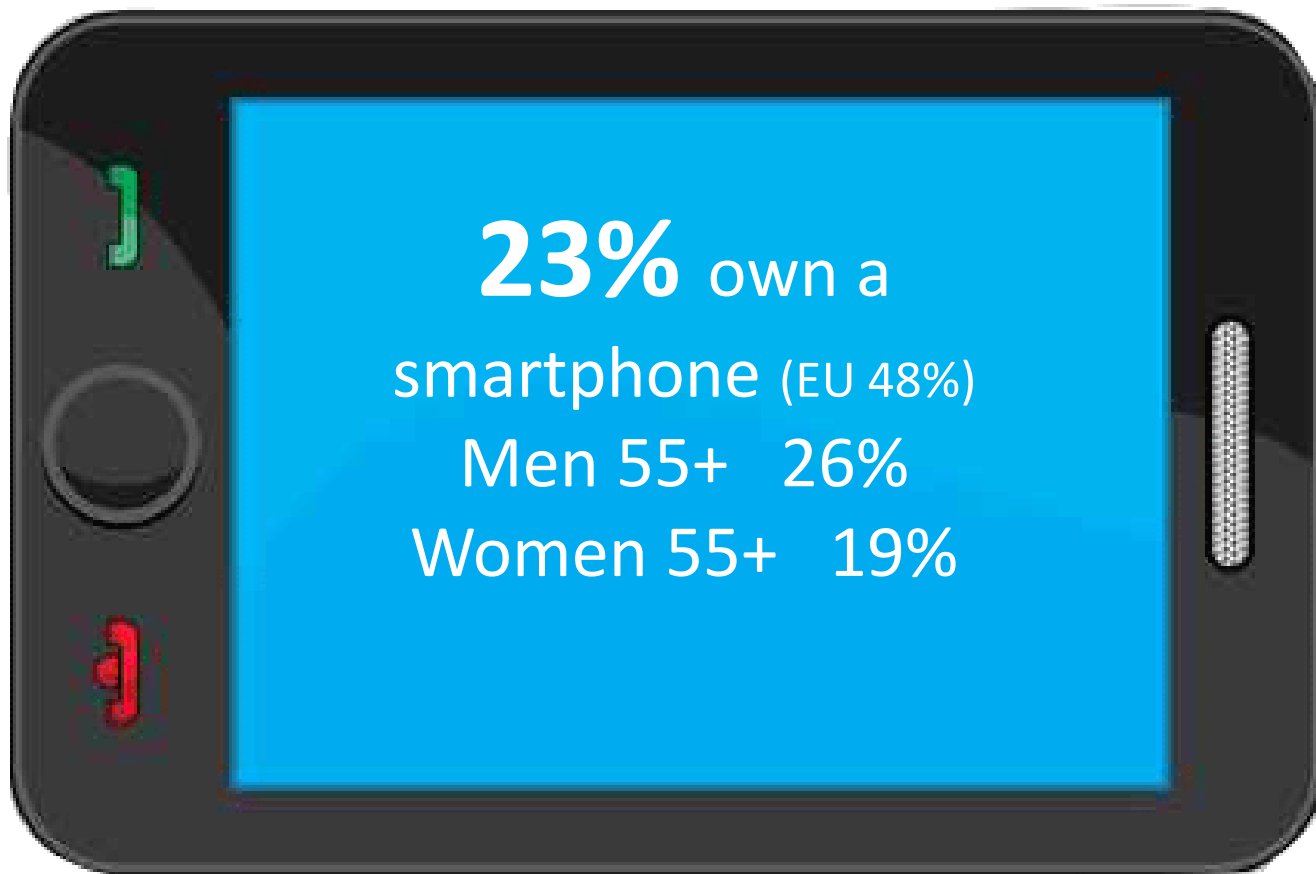
of adults 55+ own
an internet enabled
mobile (EU 73%)

64%

of **male** 55+ own
an internet
enabled mobile
(women 48%)



Almost a quarter of Silver Surfers are also embracing smartphones...



Accessing the data

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Executive Summary and
Data Presentations

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Data in planning tools – e.g.
Choices, Telmar and IMS
Clear Decisions

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