

## EIAA Online Shoppers 2008

### Executive Summary

#### Online Shoppers 2008

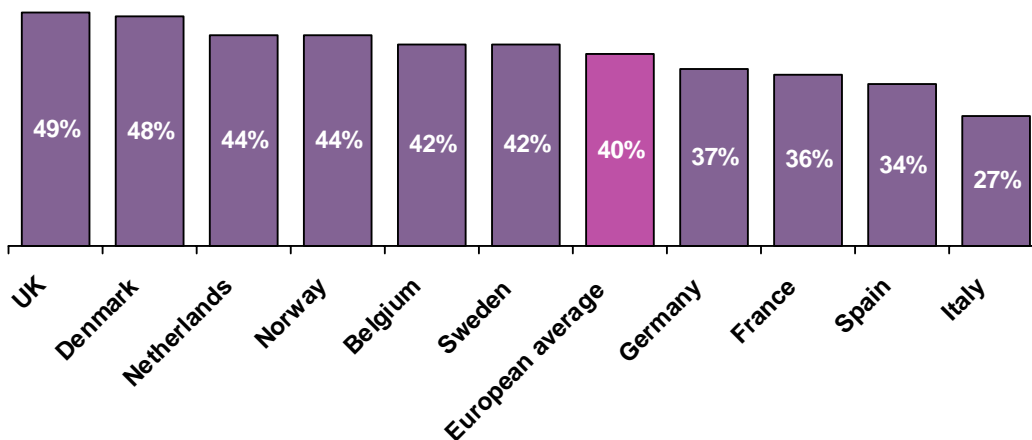
The EIAA Online Shoppers Report 2008 forms part of the ongoing Mediascope Europe Study. Now in its fifth year, Mediascope Europe is one of the most comprehensive pieces of research available looking at how people consume media and how they use the internet for content, communication and commerce.

#### Summary

##### ONLINE RESEARCH

- 40% of all European online shoppers have changed their mind about which brand to buy following research on the web
- Online shoppers in the UK are the most likely to be influenced by information on the internet (49%) while Italians are the least likely to change their mind (27%).

#### Effect of online research on brand chosen

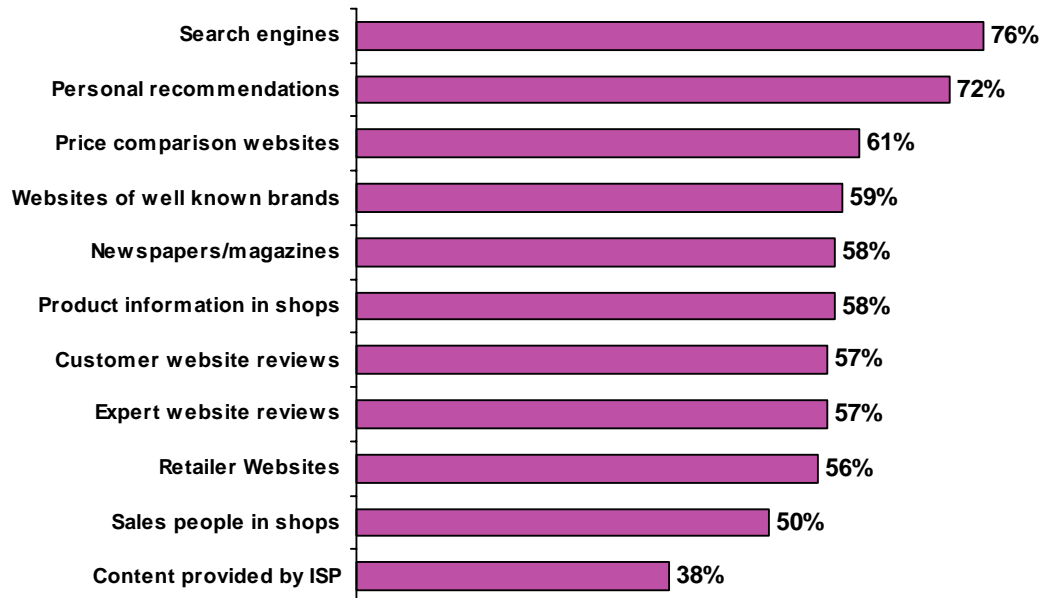


[Base: All Online Shoppers who have researched online (n=3352)]

- In comparing e-commerce behaviour across Europe, it is clear that as markets develop in online sophistication shoppers consume a wider variety of marketing messages and information sources to make their purchase decision

- European consumers are most likely to change their mind as a result of online research when it comes to buying electrical goods - 59% changed their minds on brand - and 43% changed their mind when it came to booking holidays and travel.
- Over half (59%) of online shoppers cite that websites of well known brands are an important source of information when researching or considering a product or service
  - Search engines are considered more useful (76%) than personal recommendations (72%)
  - 61% find price comparison websites a useful source of information
  - 57% look to customer website reviews to help them choose

### Key sources of information for research



[Base: All Online Shoppers (n=3352)]

### ONLINE SALES

- A massive 80% of European internet users have bought a product or service online, up 3% since 2006 and double the 2004 figure (40%)
- These European online shoppers made 1.3 billion purchases in just a six month period, spending an average of €747 each online
  - The UK (486m) and Germany (342m) made the most purchase
  - Norway (€1203) and the UK (€1195) spent the most money online per person

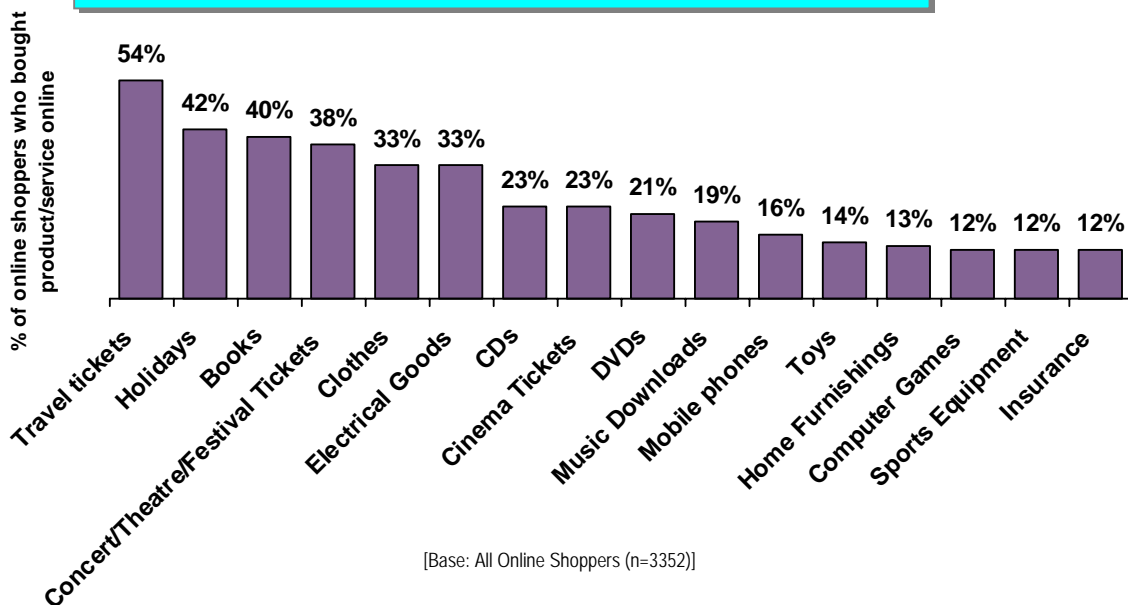
### Total number of purchases in 6 months (millions)

Country	Purchases made in last 6 months - Total (millions)
UK	485.5
France	189.0
Germany	341.7
Italy	58.9
Spain	62.4
Belgium	26.2
Netherlands	65.3
Sweden	31.3
Norway	26.2
Denmark	33.8
<b>Europe</b>	<b>1,320.3</b>

[Base: All Online Shoppers (n=3352)]

- The percentage of online shoppers buying particular products and services has increased significantly since 2006
  - The number of online shoppers purchasing mobile phones online has increased by 33%, financial products purchases are up 22%, home furnishings up 18%, car accessories up 13% and holidays up 11%
  - Both electrical goods and cinema tickets have seen a 10% growth in the number of online shoppers buying online
- Overall, the most popular online purchase is travel tickets (54%), closely followed by holidays (42%), books (40%), concert/theatre/festival tickets (38%), clothes (33%) and electrical goods (33%)

### Most popular products/services bought online by online shoppers



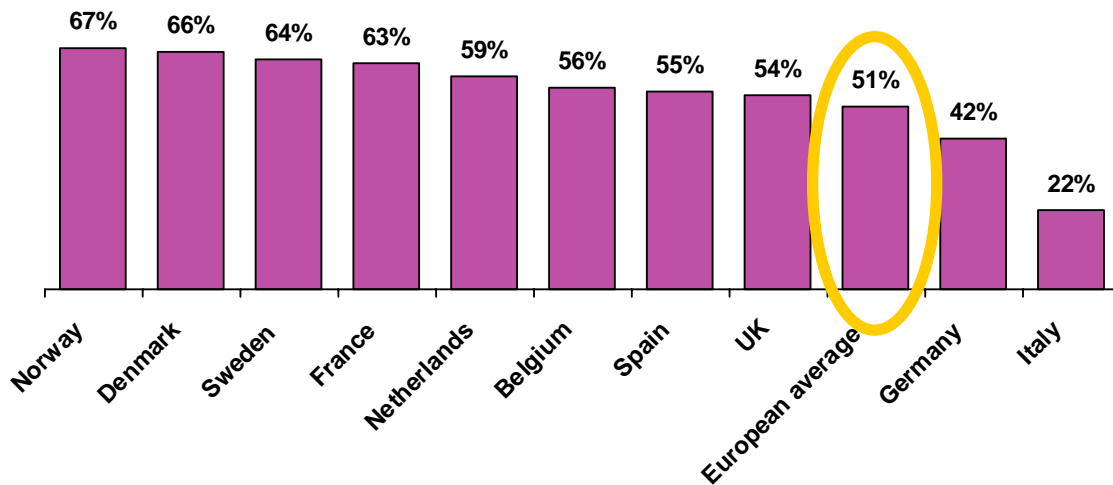
[Base: All Online Shoppers (n=3352)]

- The research highlights the gender differences of online shoppers
  - Female shoppers focus on clothes (40% vs. 27% of men) and holidays (46% vs. 38% of men)
  - Male online shoppers go for electrical goods (39% vs. 27% of women) and CDs (25% vs. 20% of women).

### HEAVY ONLINE USERS

- European online shoppers are heavy users of the internet
  - 84% of online shoppers go online via a broadband connection (compared to 70% of internet users who have not bought a product/service online)
  - On average they use the internet on 5.7 days each week, spending an average of 12.3 hours online (above the European average of 11.9) and over half (51%) log onto the internet every day:

#### Most popular products/services bought online by online shoppers



[Base: All Online Shoppers (n=3352)]

## **KEY MESSAGES**

- 40% of all European online shoppers have changed their mind about which brand to buy following research on the web, highlighting the power that websites can have in the purchasing decision.
- Online shoppers from more mature online markets are more likely to change their mind on what brand to buy following web research, than online consumers from less developed markets. As markets develop in online sophistication, shoppers will consume a wider variety of marketing messages and information sources to make their purchase decision which increasingly influences their brand and product choice. As a result, marketers must develop ever more effective strategies to engage with their consumers.
- The web is an ever more powerful resource for consumers wishing to research a product or brand. Over half (59%) of online shoppers cite that websites of well known brands are an important source of information when researching or considering a product or service and search engines are considered more useful (76%) than personal recommendations (72%).
- Marketers need to provide relevant information at the right time and in the right place online to ensure effective engagement with their consumers whilst they are in the purchase making process.
- More and more shoppers are making the most of the convenience of online shopping. 80% of European internet users have bought a product or service online, up 3% since 2006 and double the 2004 figure. Online shoppers made 1.3 billion purchases in just a six month period, spending an average of €747 each online.
- There are gender differences between goods consumed by online shoppers with female shoppers focusing on clothes (40% vs. 27% of men) and holidays (46% vs. 38% of men) while their male counterparts go for electrical goods (39% vs. 27% of women) and CDs (25% vs. 20% of women). Marketers should be aware of these gender differences when developing online marketing campaigns.

## **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 Europe 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.