

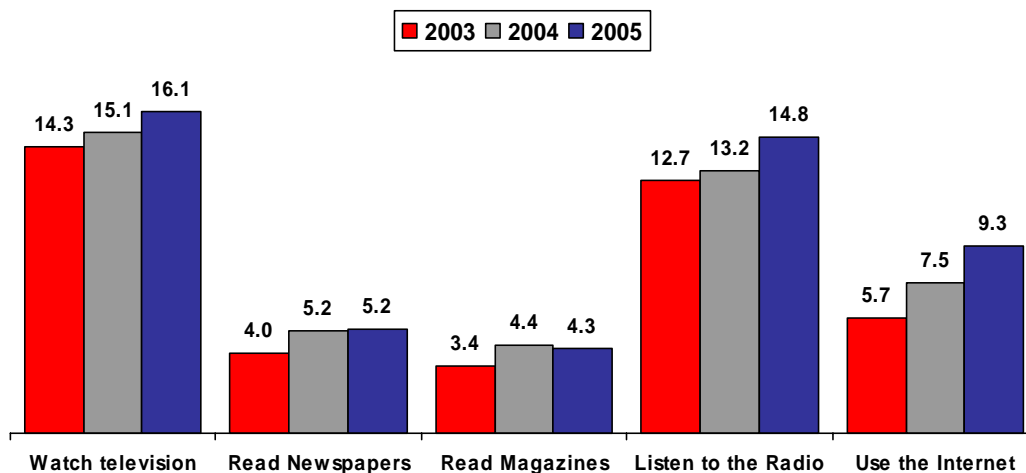
EIAA Digital Women Report 2006

Executive Summary

The first ever pan-European insight into women's attitudes and interaction with the internet has revealed that within the next year they will be online more than men if current growth trends continue. The EIAA Digital Women Report forms part of the EIAA Mediascope Europe Study and is the most comprehensive research available, looking into how European women allocate their time across media and how consumers use the internet.

Women's Media Consumption

- In 2005 men spent an average of 11 hours a week online compared to women who spent around 9 hours a week online. However, in 3 years the hours spent online by female internet users has grown by 63% and for men it has grown 54%
- The amount women watch television has grown only 12% and the amount they read magazines has fallen by 4.5% in the last year, making internet Europe's fastest growing media

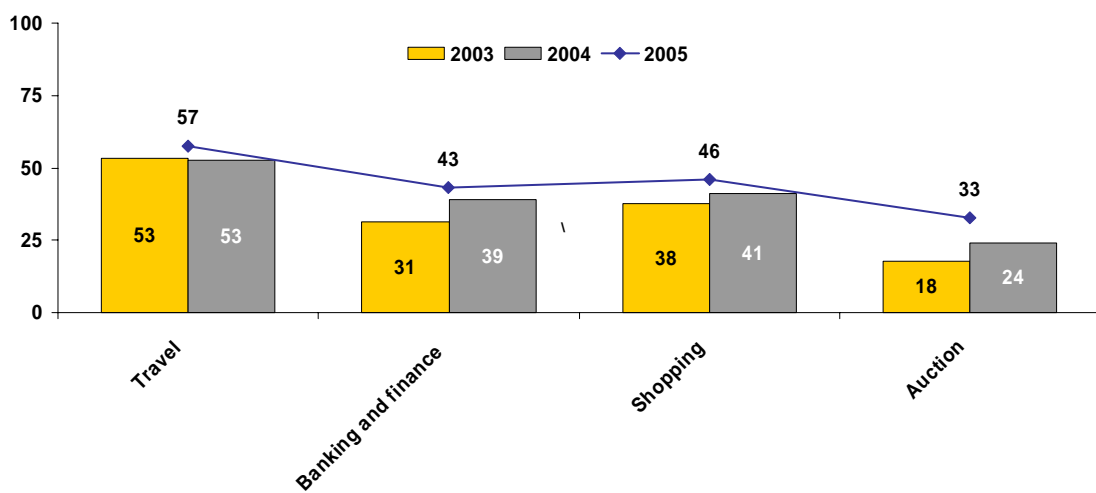


[Base: All female respondents in Central Europe 2005: 2601, 2004: 2715, 2003: 2511]

- Growth is being driven by 16-24 year olds, young professionals and women with children. Young professionals using the internet has more than doubled (+116%) since '03 and women with children use the internet 14% more than the average European woman

Women's Websites

- The fastest growing websites visited by women are travel, auction, shopping and banking / finance sites



[Base: All female internet users in Central Europe 2005: 1042, 2004: 958, 2003: 880]

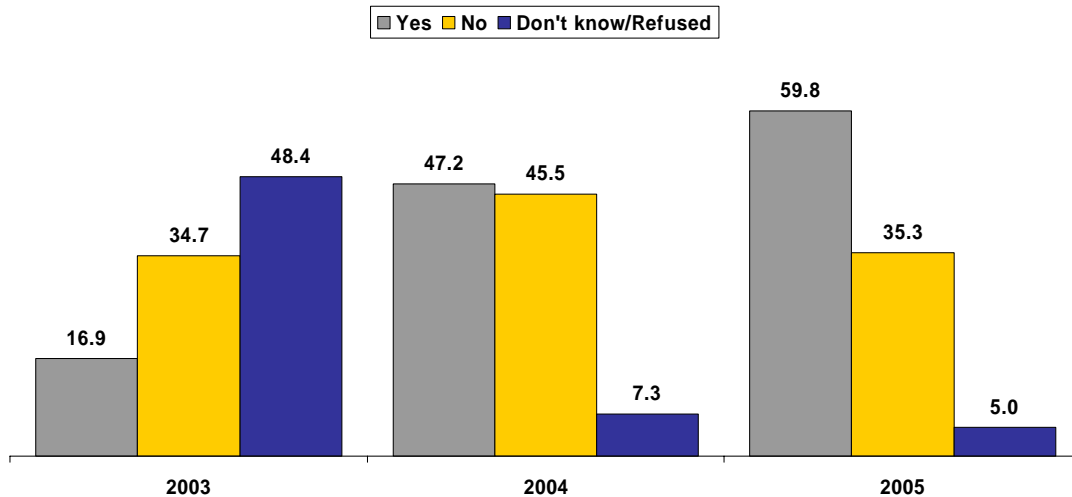
Attitudes to the Internet

- Today's busy lifestyles, means that female internet users are making the most of the convenience that the internet offers:
 - 80% felt they could *"get what they want quickly and save time"* on the internet, compared to 22% for newspapers, 18% for television and 17% for radio
 - 67% agreed they could *"have what they want, when they want it"*, compared to: 28% for television, 27% for newspapers and 25% for magazines
 - 61% believed the internet helped them *"stay ahead of the game"*, compared to: 44% for television, 41% for newspapers and 30% for radio

Impact of Broadband

- Women's understanding and use of the internet is becoming increasingly sophisticated. Today, 60% use broadband to go online compared to only 17% three years ago

- The increasing popularity of broadband is having a clear impact on who is using the internet and how they are using it. Today only 5% of European women don't know if they have broadband, and they are using its speed and convenience to benefit many different facets of their lives



[Base: All female internet users in Central Europe: 2005: 1042, 2004: 978, 2003: 880]

Impact for Advertisers

- Advertisers need to recognise how women's use of different media is evolving and the way in which they are interacting with the internet is becoming increasingly integrated into their lifestyle through blogging, ecommerce and instant messaging etc
- Today's consumers no longer conform to the old stereotypes, they are more sophisticated and demanding. The internet offers advertisers the opportunity to engage and interact with their customers better, ultimately building deeper relationships

Top 10 Tips for Advertisers

1. **Understand evolving media** – Advertisers need to recognise how women's use of different media is evolving and becoming more complex – the internet now offers a much more varied environment where women are making the most of the information, communication and commerce opportunities.
2. **Develop an interactive relationship** - Because of this complexity, advertisers can create a more interactive relationship with female consumers online. It is

essential to plan for the long-term and develop a detailed strategy for communicating with a female audience.

3. **Seek out new routes** - Online advertising offers greater variety and creative opportunities than simply running a series of ad banners. Advertorials and sponsorships are just two examples of alternative routes that could increase visibility and relevance of message
4. **Study trends** – Keep up on what's hot and how women are using the internet to in their day-to-day lives - blogging, instant messaging, chat etc
5. **Never use stereotypes** - Today's consumers no longer conform to the old stereotypes, they are all individuals online so don't try to categorise them too simply.
6. **Think clever creative** – Online consumers are sophisticated and demanding. The internet offers advertisers the opportunity to engage and interact with their customers better but you need inventive and relevant campaigns, not gimmicks, to connect effectively with your audience.
7. **Broadband implications** - The increasing popularity of broadband is having a clear impact on who is using the internet and how long they are using it for. Think about the creative possibilities offered.
8. **Look at environments** - does the particular online environment you're considering for a campaign really appeal to women? Think again about what they want and where you are planning ads.
9. **Think prime time** – online is the second most used media during the day behind radio, and provides an extremely cost effective way of extending reach and impact.
10. **Test and improve** – online is all about learning from your campaigns and improving creative and planning, use this to your advantage! You can also see how some of the world's biggest brands have used online by visiting the EIAA Case Study Library at www.eiaa.net.

About the EIAA

The European Interactive Advertising Association is a pan-European trade organisation for sellers of interactive media. The primary objectives of the EIAA are to champion and 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 Internet Media AG, AOL Europe, MSN International, Tiscali, Yahoo! Europe, LYCOS Europe and T-Online International.