

GfK Online Monitor 2008 - Internet Market in Austria

Data basis: GfK Online Monitor 2004 ff. (method see next chart)

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67% of Austrians 14+ already make use of the Internet. Looked at in terms both of the present and the past, characteristics of the Internet market are, amongst other things:

- No other medium has experienced such a dynamic development in such a short period of time, neither in Austria nor worldwide (see Chart 3).
- Amongst the population group of 14 to 59 year-olds, with nearly 80% being users, the Internet can already be described as a universal medium, and the generation of the under 20 year-olds, about 91% of whom use the Internet, is growing up with the medium.
- After a very emotional initial debate over the new medium, today the Internet, with its central functions of communication, information, and service, has become a more rationally defined medium.
- For the user, the Internet has become an integral part of their life. The new medium has become indispensable in those places, above all, where the Internet can make daily life easier, such as online banking, online shopping, administrative procedures or targeted search for information.

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GfK Online Monitor

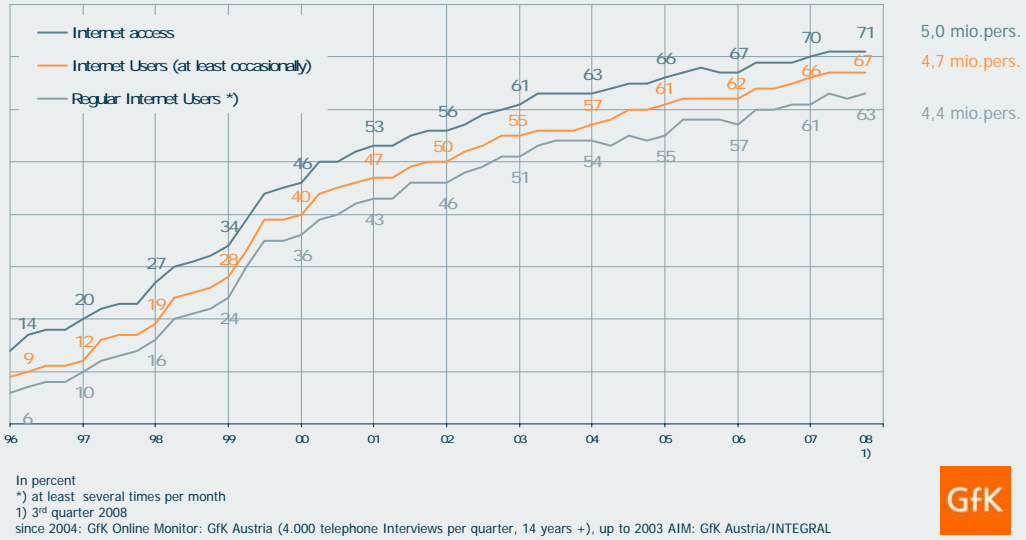
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| | |
|---------------|--|
| Client | Own project by GfK Austria, with additional questions exclusively for clients |
| Execution | Continuous survey, comparable data since 1996 (AIM, GfK Online Monitor 2004 ff.) |
| Content | Basic data about the Austrian Internet market |
| Results | The survey is conducted every quarter with the possibility to include additional questions for clients on short notice |
| Universe | Austrian population 14 years and older |
| Sampling | Address-Random |
| Sample size | 4.000 interviews per quarter, from 1.000 on exclusive questions |
| Survey method | By telephone, CATI - Computer Assisted Telephone Interviews |

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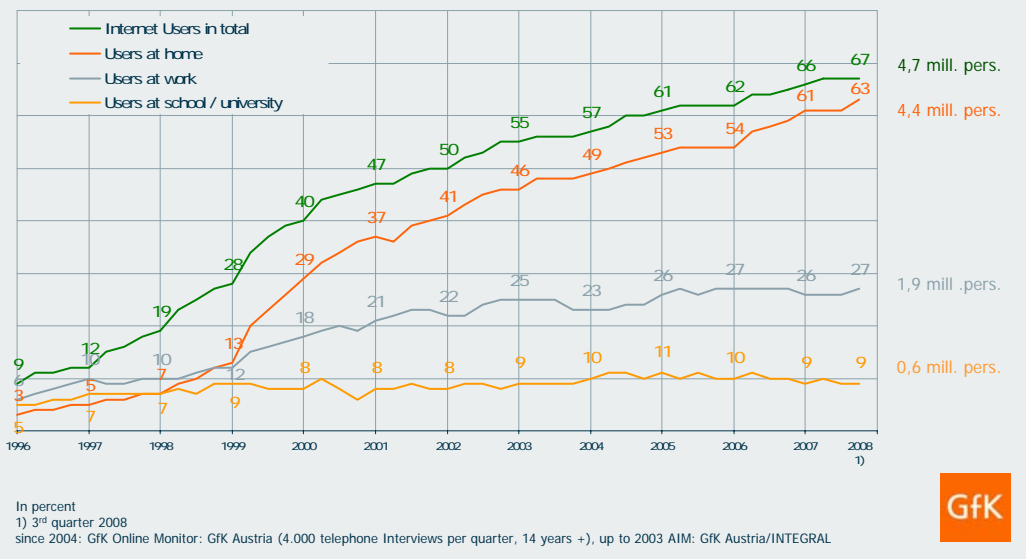
Development of the Austrian Internet Market 1996-2008

Basis: Austrians 14 years and older (6,979.000 persons)



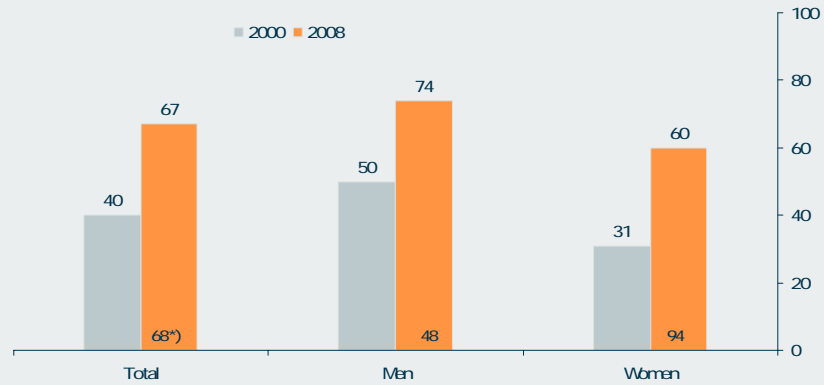
Development of Internet Use in Austria by Location (1996-2008)

Basis: Austrians 14 years and older (6,979.000 persons)



Total Internet Use by Sex 2000 vs. 2008

Basis: Austrians 14 years and older (6,979.000 persons)



In percent

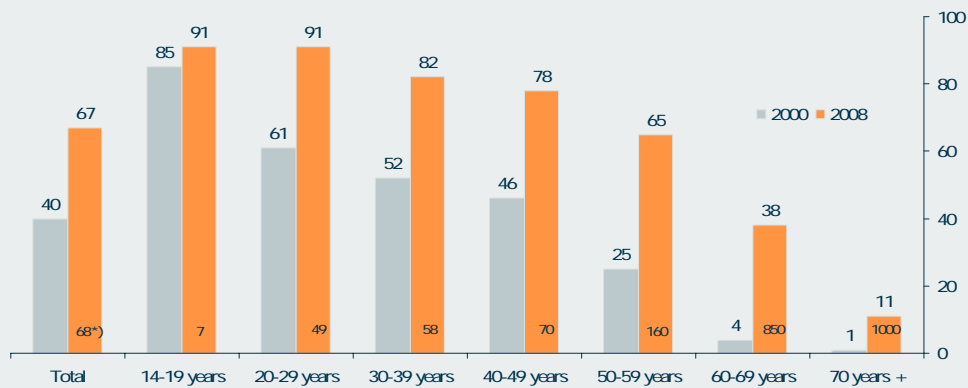
2008: GfK Online Monitor 3rd quarter, GfK Austria (4.000 telephone Interviews per quarter, 14 years +), 2000 AIM: GfK Austria/INTEGRAL

*) Increase in percent from 2000 to 2008

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Total Internet Use by Age 2000 vs. 2008

Basis: Austrians 14 years and older (6,979.000 persons)



In percent

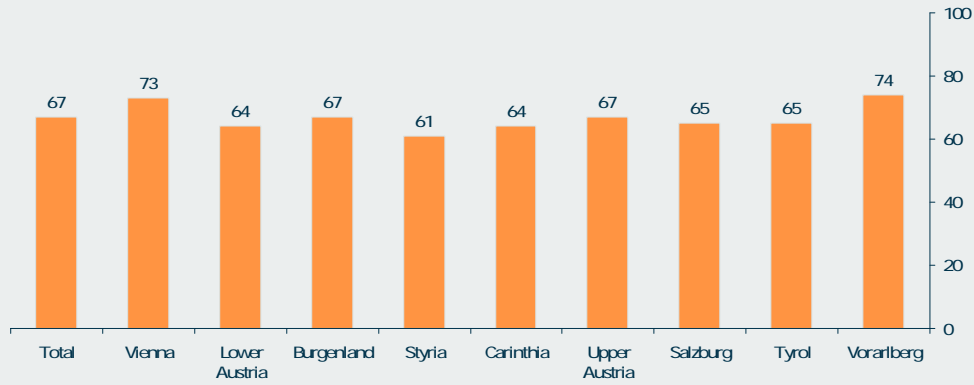
2008: GfK Online Monitor 3rd quarter, GfK Austria (4.000 telephone Interviews per quarter, 14 years +), 2000 AIM: GfK Austria/INTEGRAL

*) Increase in percent from 2000 to 2008

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Total Internet Use by Region 2008

Basis: Austrians 14 years and older (6,979.000 persons)



In percent
2008: GfK Online Monitor 3rd quarter, GfK Austria (4.000 telephone Interviews per quarter, 14 years +)



Total Internet Use by Size of Town 2008



In percent
2008: GfK Online Monitor 3rd quarter, GfK Austria (4.000 telephone Interviews per quarter, 14 years +)



Structure of Internet Users - by Sex and Age 2000 vs. 2008

| | Total Population | Internet User 4 th quarter 2000 | Internet User 3 rd quarter 2008 |
|---------------|------------------|---|---|
| male | 48 | 59 | 53 |
| female | 52 | 41 | 47 |
| 14 - 19 years | 9 | 17 | 13 |
| 20 - 29 years | 13 | 29 | 18 |
| 30 - 39 years | 18 | 25 | 22 |
| 40 - 49 years | 20 | 18 | 22 |
| 50 - 59 years | 15 | 9 | 15 |
| 60 - 69 years | 14 | 2 ^{*)} | 8 |
| 70 years + | 11 | | 2 |

In percent, ^{*)} 2000: "60 years +"

2008: GfK Online Monitor: GfK Austria (4.000 telephone Interviews per quarter, 14 years +), 2000 AIM: GfK Austria/INTEGRAL



Structure of Internet Users by Education and HH Net Income 2000 vs. 2008

| | Total Population | Internet User 4 th quarter 2000 | Internet User 3 rd quarter 2008 |
|-----------------------|------------------|---|---|
| Elementary School | 28 | 22 | 21 |
| Professional School | 48 | 39 | 48 |
| Highschool/University | 24 | 37 | 31 |
| Up to € 1.400,-- | 18 | - ^{*)} | 9 |
| Up to € 2.200,-- | 27 | - | 25 |
| Over € 2.200,-- | 40 | - | 51 |
| n.a. | 15 | - | 15 |

In percent, ^{*)} no comparable data

2008: GfK Online Monitor: GfK Austria (4.000 telephone Interviews per quarter, 14 years +), 2000 AIM: GfK Austria/INTEGRAL

