



Understanding the role of the Internet in the lives of consumers

Digital Influence Index

Research conducted in December 2009 and January 2010,
by Fleishman-Hillard and Harris Interactive
North America, Europe, and Asia





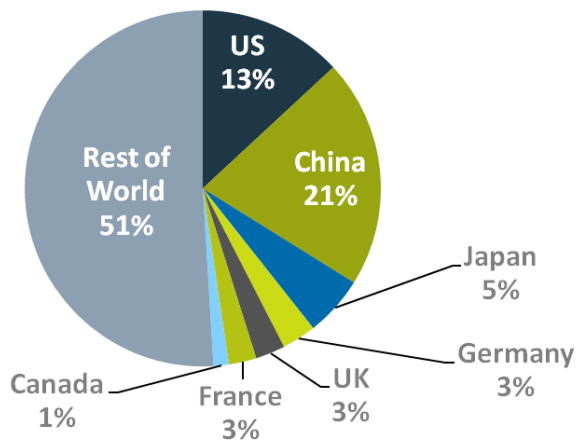
Background on the Study

- > Interviewing for the online survey took place between December 2009 and January 2010.
- > We interviewed 4,243 Internet users across seven countries:
 - Canada, China, France, Germany, Japan, U.K., and United States
- > The data was weighted to be representative of the online populations of each country.

Who did this study cover?

- > We covered 49% of the global online population by studying seven countries.
- > China has the largest online population, but at only 27% penetration, has a lot of room to grow.
 - The population that is online in China skews male, younger, with higher relative incomes and is much more likely to have broadband access than countries with earlier adoption.

Percent of Global Online Population



Country	Population (millions)	% Online	Population Online (millions)
China	1,338	27%	360
US	308	74%	227
Japan	127	76%	96
Germany	82	66%	54
UK	62	76%	47
France	65	69%	43
Canada	34	75%	25

9 Key Findings

No. 1: *Funding Gap:*
Globally, digital
dominates in
consumer influence
— but not marketing
dollars spent.



Digital Influence Index

Media index scores by country

China



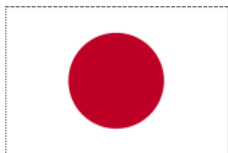
Internet = 66%
TV = 15%
Newspapers = 8%

United States



Internet = 55%
TV = 29%
Newspapers = 4%

Japan



Internet = 54%
TV = 34%
Newspapers = 5%

Germany



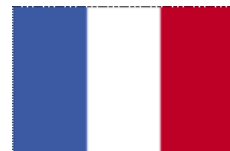
Internet = 47%
TV = 29%
Newspapers = 5%

U. K.



Internet = 54%
TV = 31%
Newspapers = 3%

France



Internet = 53%
TV = 27%
Newspapers = 5%

Canada

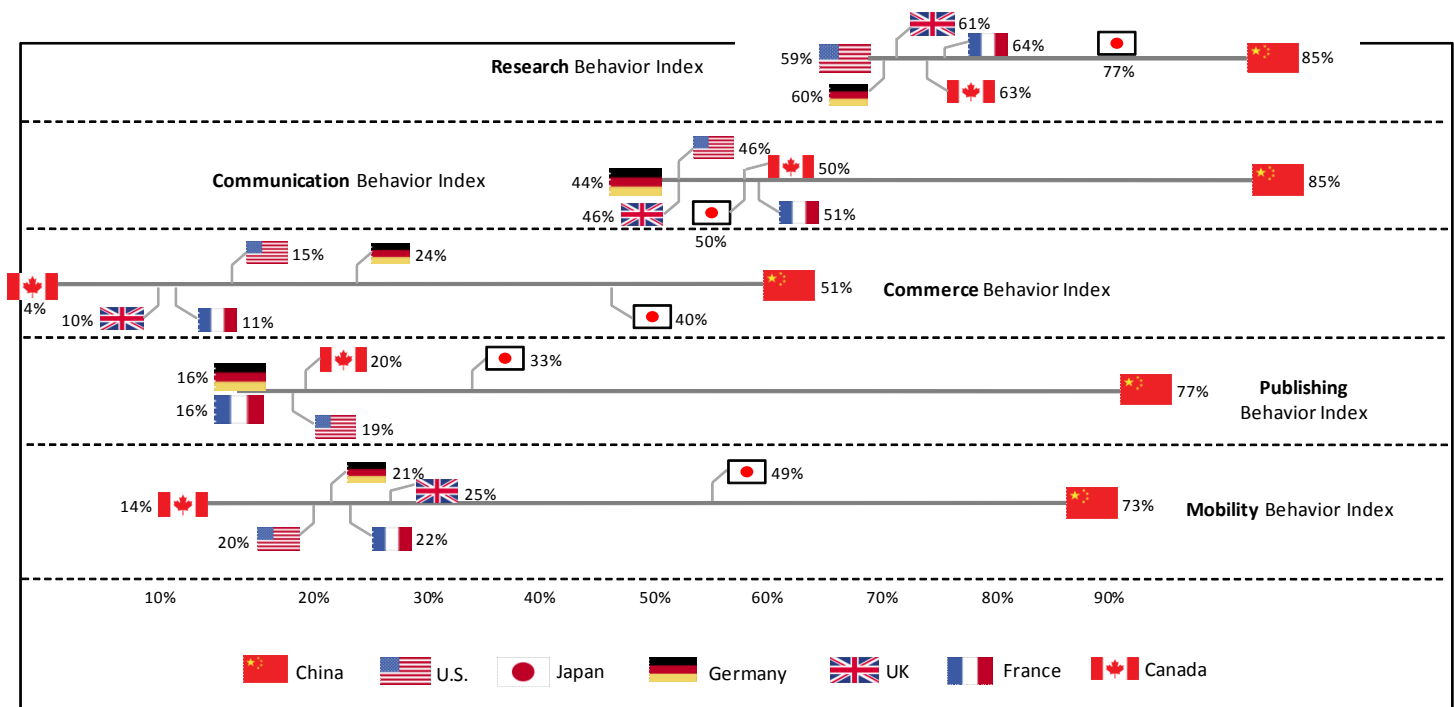


Internet = 54%
TV = 27%
Newspapers = 5%

The Internet is more impactful than other forms of media ...
... more than traditional media forms such as TV and newspapers ...
... and this is even more so in fast-developing China.








No. 2: *On the Edge:* Chinese Internet users are more advanced, but are early adopters, with room to grow.

Indices of behavioral adoption by type of behavior



No. 3: ***Beyond Mainstream:***
Digital is core to
decisions — for
research, purchases
and peer influence.

Use Internet to help make decisions

(All numbers are percents)							
Consumer electronics	88	51	59	75	54	64	56
Friends and family	87	55	55	64	41	55	46
Personal finance	84	35	46	47	44	32	32
Travel and leisure	83	46	62	63	52	59	51
Health, diet and fitness	83	38	49	41	34	34	41
Politics and current affairs	82	41	49	59	32	34	31
Consumer products	78	37	46	42	34	30	38
Running the home	67	29	46	49	41	46	26

BASE: All respondents, (n=4,243)

Say Internet is important to decisions

(All numbers are percents)	TOTAL	Search engine	Comments from other people	Blog	Company-sponsored website	Product/price comparison site	Social networking site	Politically oriented website	Online ad	Government-sponsored website
Children*	52	74	77	48	46	43	45	54	47	31
Packaged goods	50	70	65	54	43	51	43	53	46	22
Education	40	60	52	36	37	45	41	32	39	20
Healthcare	40	64	56	42	40	37	27	36	37	21
Public affairs	36	55	48	36	27	16	30	58	31	29
Personal finances	35	61	44	32	42	36	21	31	35	17
Consumer electronics	34	64	49	28	35	45	16	26	33	5
Utilities	34	63	41	22	50	53	13	17	31	19
Travel and leisure	32	62	45	23	43	42	19	23	27	9

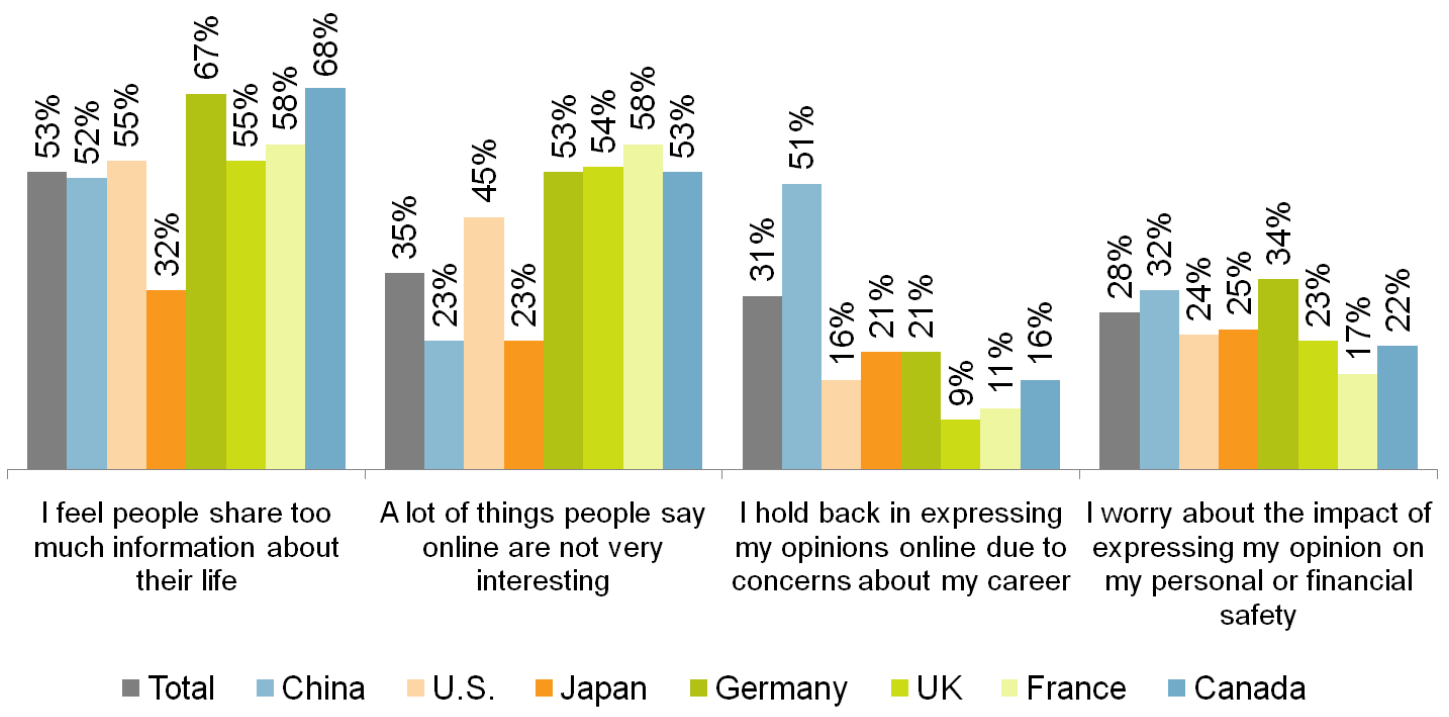
* Based on just one question.

Figures represent the average percentage of consumers who indicated the following source (column) helped them make a decision about the goods and/or services (row).

No. 4: *Too Much Information:* Online oversharing of personal information isn't just a bore, but a rising threat, as well.



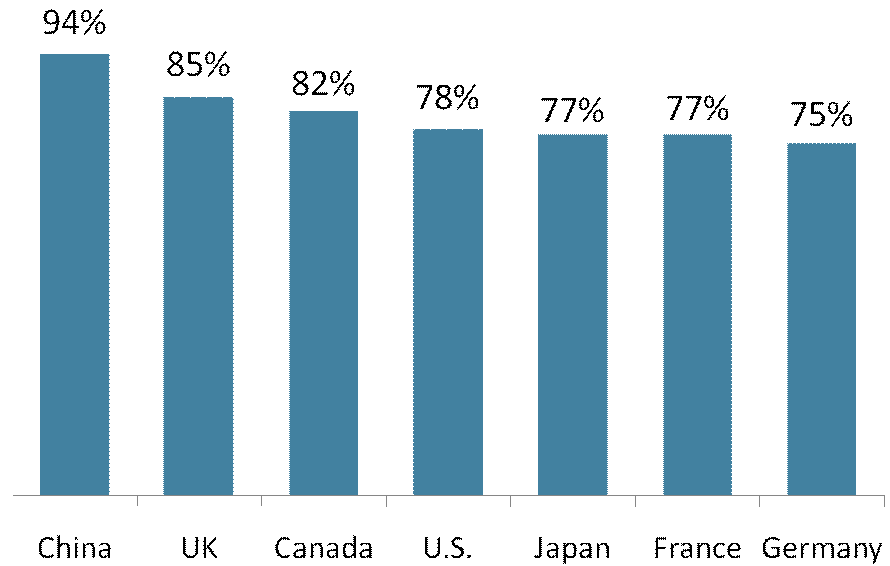
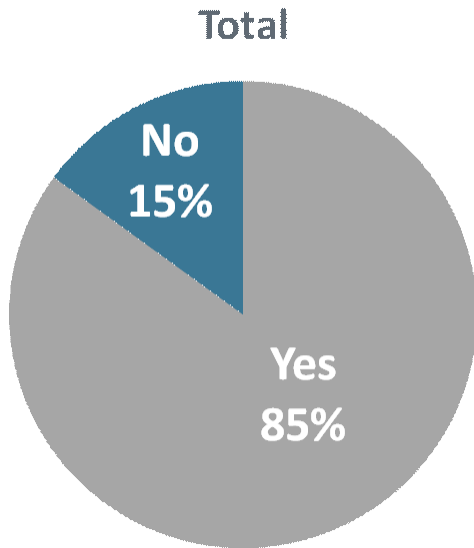
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BASE: All respondents, (n=4,243)

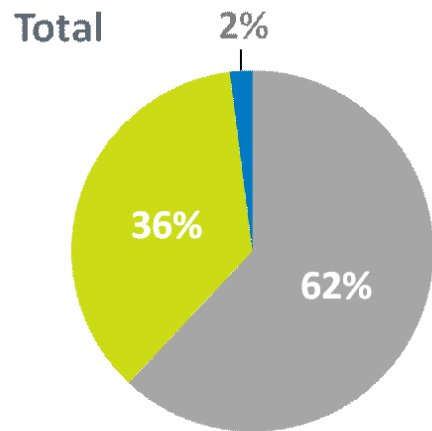
No. 5: *Cautiously Trusting:*
People trust the Internet most when they have multiple sources — and a friend is one of them.

- > Most Internet users trust the information available on the Internet
- > Most trusting are Chinese, least trusting are Germans

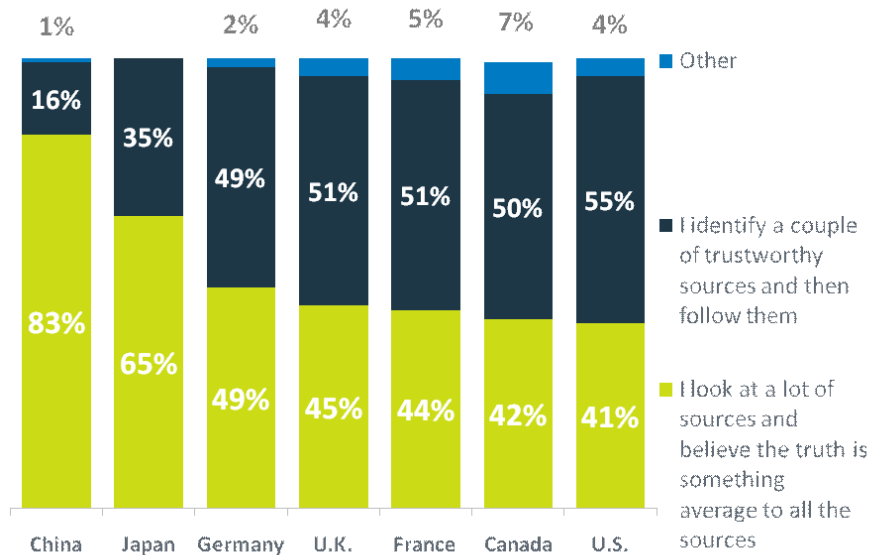


(Percent indicating 'yes,' they generally trust the information available on the Internet)
 BASE: All respondents, (n=4,243)

In the U.K., France, Canada and the U.S., consumers are more likely to identify a couple of trustworthy sources and then follow them as a way to find the most truthful information on the Internet



- I look at a lot of sources and believe the truth is something average to all the sources
- I identify a couple of trustworthy sources and then follow them
- Other



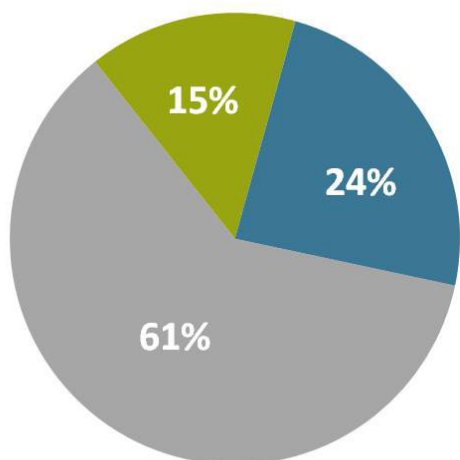
BASE: All respondents, (n=4,243)

No. 6: *Pay to Play Doesn't*
Play: Trust in bloggers
for hire remains weak.



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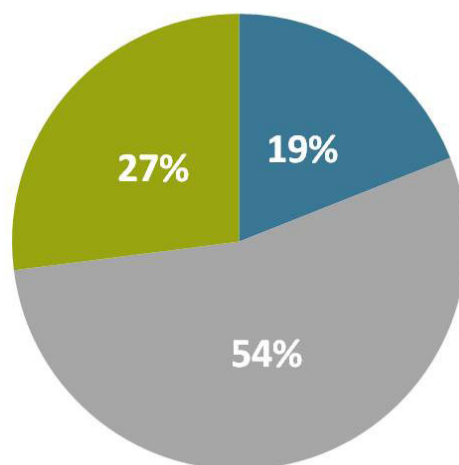
Given a free Sample



80% increase in those who would not trust the truthfulness



Paid



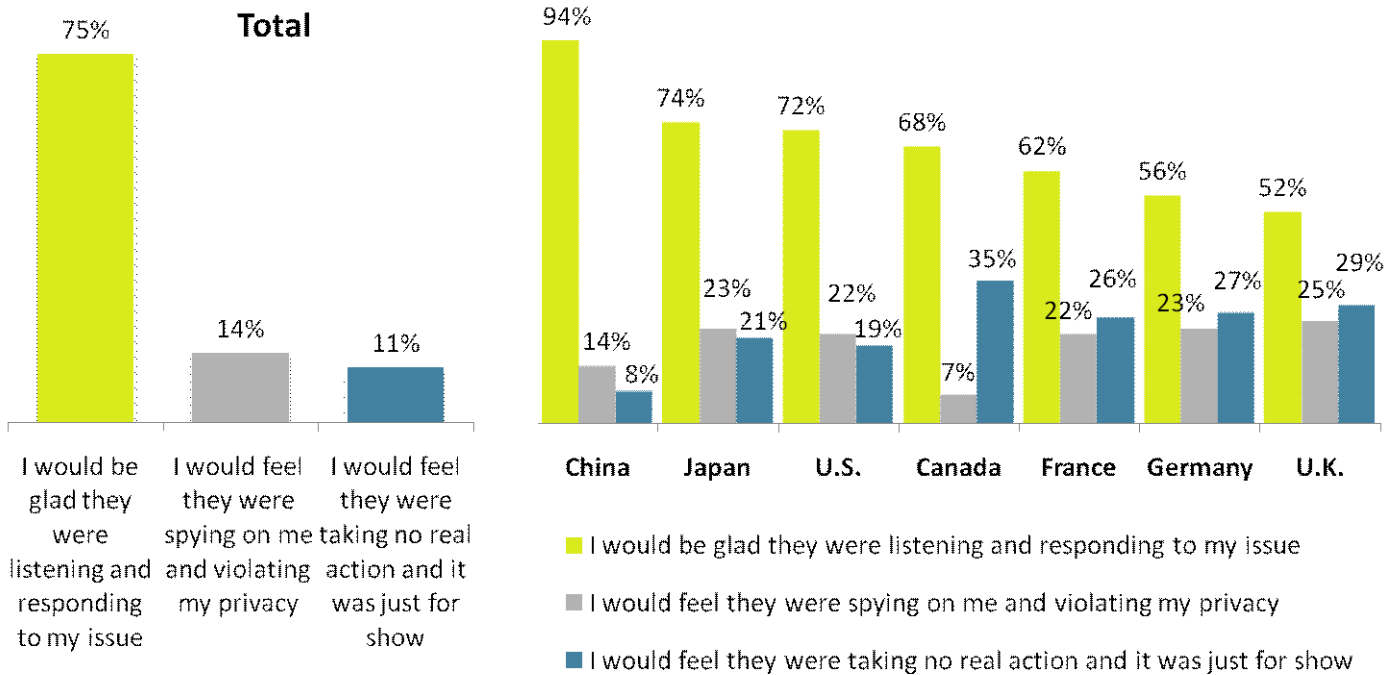
- I do not know if I could trust the truthfulness of the article
- I would not trust the truthfulness of the article
- I would trust the truthfulness of the article

BASE: All respondents, (n=4,243)

No. 7: *Real-Time Trust:*
Microbloggers trust
companies that listen
and respond in
real time.



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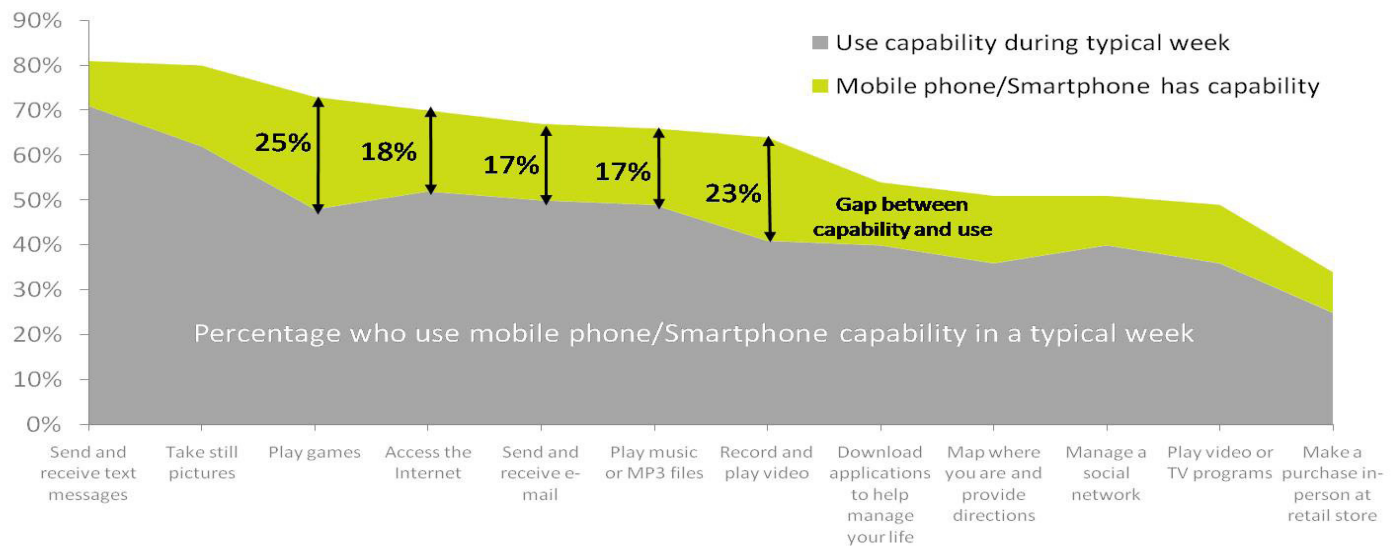
BASE: Respondents who have a microblog account, (n=1,087)

No. 8: *Mobility Gap:* As apps multiply and speeds increase, mobile users snap up smartphones — but realize only a fraction of their potential.



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> An average of one fifth (21%) of mobile phone users do not use the features or full capabilities that their phones come equipped with.



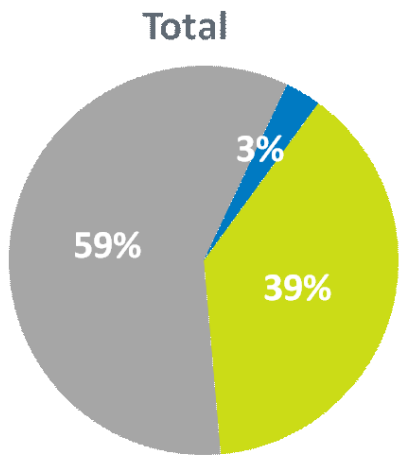
BASE: Variable base. Respondents who have a cell phone and/or Smartphone with each function.

***Where to From
Here?:***

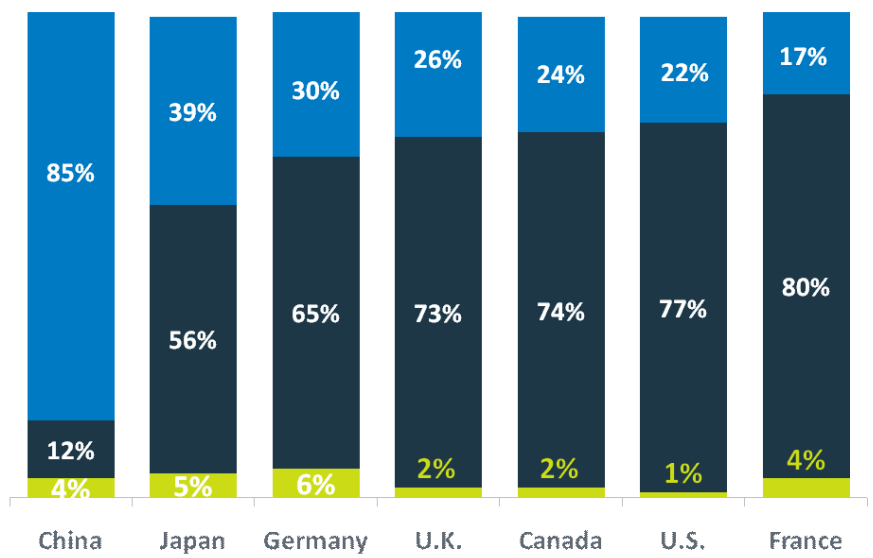
No. 9: As Internet use continues to grow, will its influence grow, too? Depends who you ask.



Digital Influence Index




- More influence in two years than now
- About the same influence in two years as now
- Less influence in two years compared to now



- More influence in two years than now
- About the same in two years as now
- Less influence in two years compared to now

BASE: All respondents, (n=4,243)



Questions about methodology and
conducting additional online research:

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