



## **Findings of the 16<sup>th</sup> session of the NetObserver® Europe Study: Noticeable differences between generations on media usage and on the main factors influencing their purchase decisions**

The usage and perception that the consumers have of the media are telltale signs of the influence that media can have on their purchase decisions.

That is why the 16<sup>th</sup> edition of the NetObserver® survey, carried out on around 265 000 European Internet users separated into two age groups (15-34 year olds and 35 year olds and over) for analytical purposes, studied:

1. the two key roles of media: to inform and entertain
2. the three main categories of factors influencing purchase decisions: advertising in the media, direct marketing and opinions and advices

In this report, we examined the following key findings:

- the young Internet users use far more media as entertainment than their elders
- the purchase decisions of 15-34 year olds are more influenced by advertising in the media than the decisions of the over 35s
- direct marketing plays an important role on the purchase decisions of the over 35 years olds
- opinions and advices have a comparable influence on the two generations of Internet users studied

## The young Internet users use far more media as entertainment than their elders

Either as a source of information or as entertainment, the European Internet users – depending on their age – do not always favour the same media.

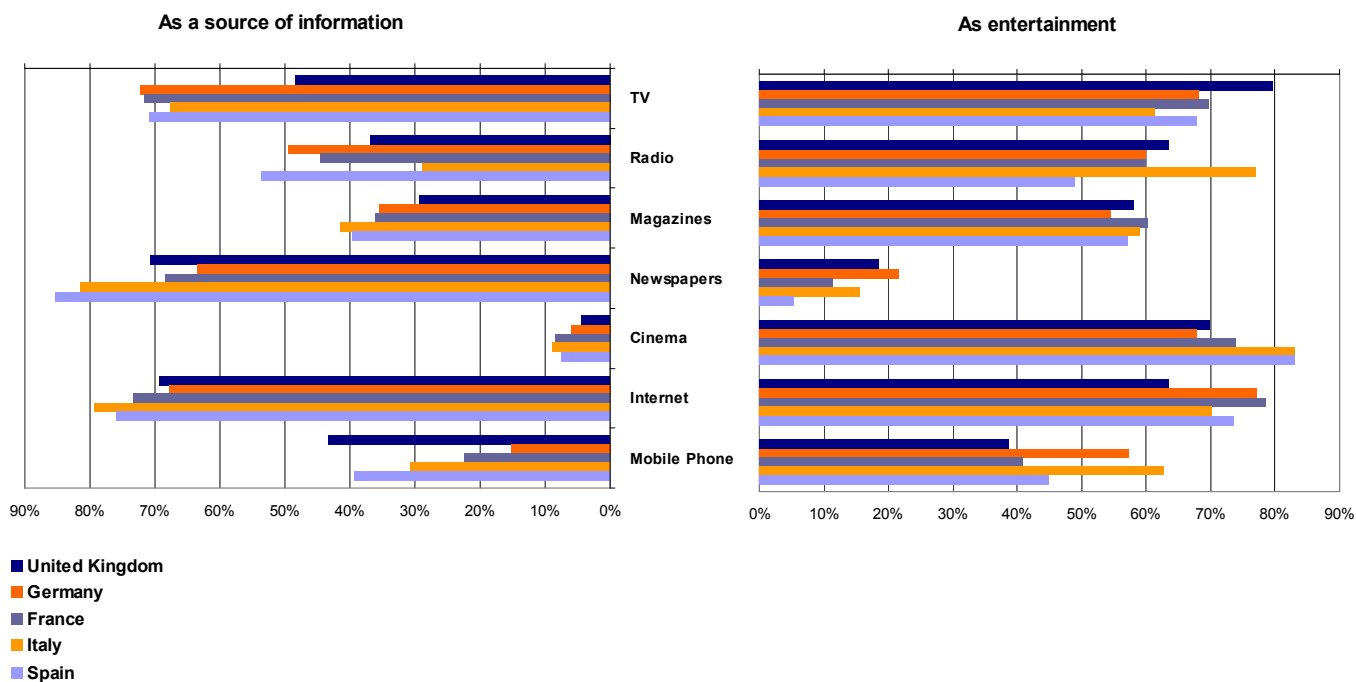
For information purposes, the 15-34 year olds and their elders put forward the same three media, namely newspapers and Internet at relatively close levels, followed by TV. However one should note the more important role that radio is playing for the 35 year olds and over.

The two generations agree in the choice of the three main entertaining media: TV, Cinema and Internet. However they do not rank them in the same way. The 15-34 year olds prefer the cinema and the Internet to the TV, whereas the TV is still the preferred entertaining media for the elder generation.

Globally, if the 15-34 year olds use media as much as their elders as a source of information, they are a lot more numerous in using them as entertainment.

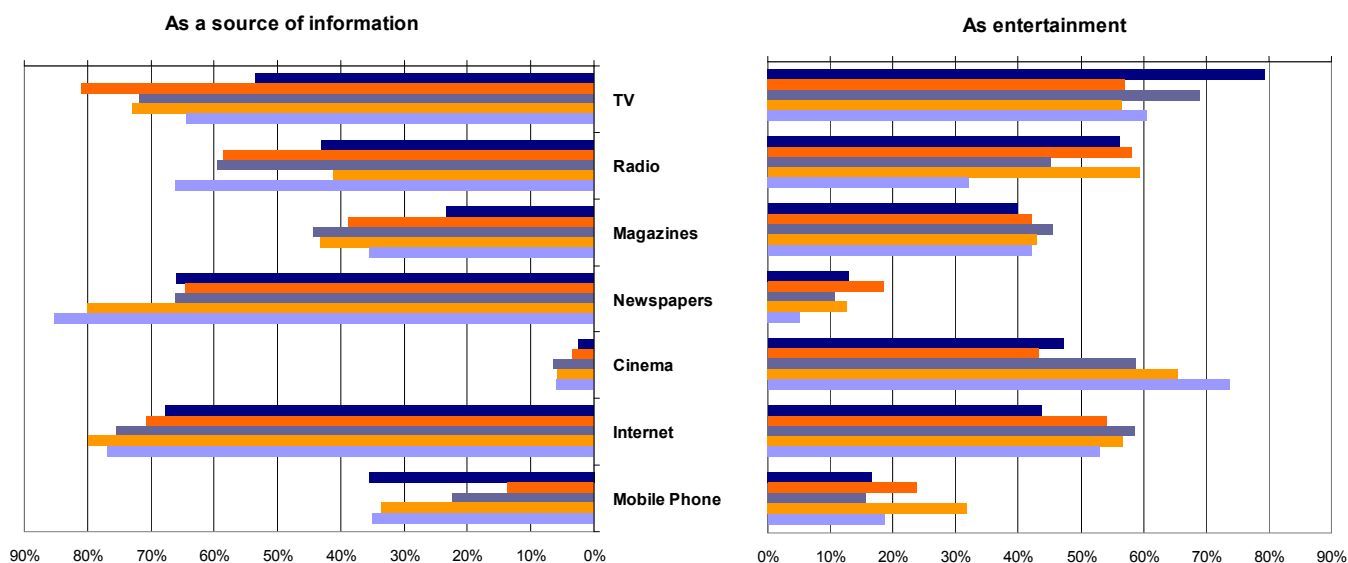
### Favoured media by European Internet users from 15-34 years old

(Source: Harris Interactive - NetObserver® Europe, December 2007)



### Favoured Media by European Internet users aged 35 and over

(Source: Harris Interactive - NetObserver® Europe, December 2007)



Another analysis consists of comparing, for each of the two generations, the informative and entertaining roles of each media.

If it comes out that TV globally plays these two roles in a balanced enough way, both among 15-34 year olds and among over 35 year olds, it appears to be the only media to do so.

The radio globally plays a role slightly more informative than entertaining for the group aged 35 years old and over. Yet, amongst the 15-34 year olds, the radio fully plays its entertaining role. As a matter of fact, the generation of the 35s and over are noticeably more numerous to use the radio for information purposes, while the 15-34 year olds, on the contrary, are more numerous than their elders to use it as entertainment.

Also, if the entertaining role of magazines is globally only slightly ahead of its informative role for those of the age 35 and above, the difference is far more pronounced for young Internet users as they are more inclined to take advantage of the media for entertaining purposes.

The role of newspapers as informative and cinema as entertainment, is no doubt clear for both generations. As mentioned earlier, the young Internet users are, nevertheless, more numerous than their elders at favouring cinema as an entertainment media.

Globally, if the Internet today still plays a more informative than entertaining role, it is mainly due to the use those aged 35 and over make of it.

Indeed, according to those aged 15-34, the Internet, as well as TV, is viewed as much as an entertainment as a source of information.

Concerning mobile phones, they are used by young Internet users mainly as a source of entertainment, but also as a source of information. Those of 35 and above put forward the informative role of mobile phones rather than their entertaining role. As a point of comparison, the proportion of young European Internet users who use their mobile phone as a source of entertainment is comparable to those 35 years old and over, that use the radio in this purpose.

Amongst the main differences between the five markets studied, one can notice that in France, the 15-34 year olds use the Internet slightly more as source of entertainment (79%) than a source of information (73%). On the contrary, those 35 years old and over are clearly many more in using the radio to keep themselves informed (59%), than to entertain (45%).

In Italy, radio dominates TV and Internet as a means of entertainment. It therefore positions itself just behind cinema, as much for young users (77%) as for older users (59%). It needs to be said, Italian Internet users are more numerous in using TV for information purpose than for entertainment, whether they be 15-34 (68% vs 61%) or over 35 (73% vs 57%).

Moreover, one can notice that 15-34 year olds in Italy use the Internet more to be informed (79%) than to entertain themselves (70%), contrary to young French Internet users.

On the other hand, in Spain it is the radio that comes out on top as an informative media. It has even passed the television in regards to those aged 35 and over, thus appearing in the top three informative media for this age group.

Amongst other elements of Italy and Spain, it can be noticed that Internet users use more newspapers to keep themselves informed and the cinema as entertainment more so than others.

In Germany, Internet users, no matter their age, use TV as a source of information rather than as a source of entertainment. This difference in usage is more noticeable amongst those aged 35 and above. More over, like the young French Internet users, those aged 15-34 in Germany use the Internet more as entertainment (77%) than as a source of information (68%).

In the UK, TV is largely chosen (80%) as the top of all entertainment media, as much for those aged 15-34, as for those aged 35 and above. So much so that its informative role is minor in comparison to the other countries.

Concerning radio and magazines, the British aged 35 and above, consider them more entertaining than informative.

By contrast, like the Italian, those aged 15-34 use the Internet as a source of information (69%) rather than as entertainment (63%).

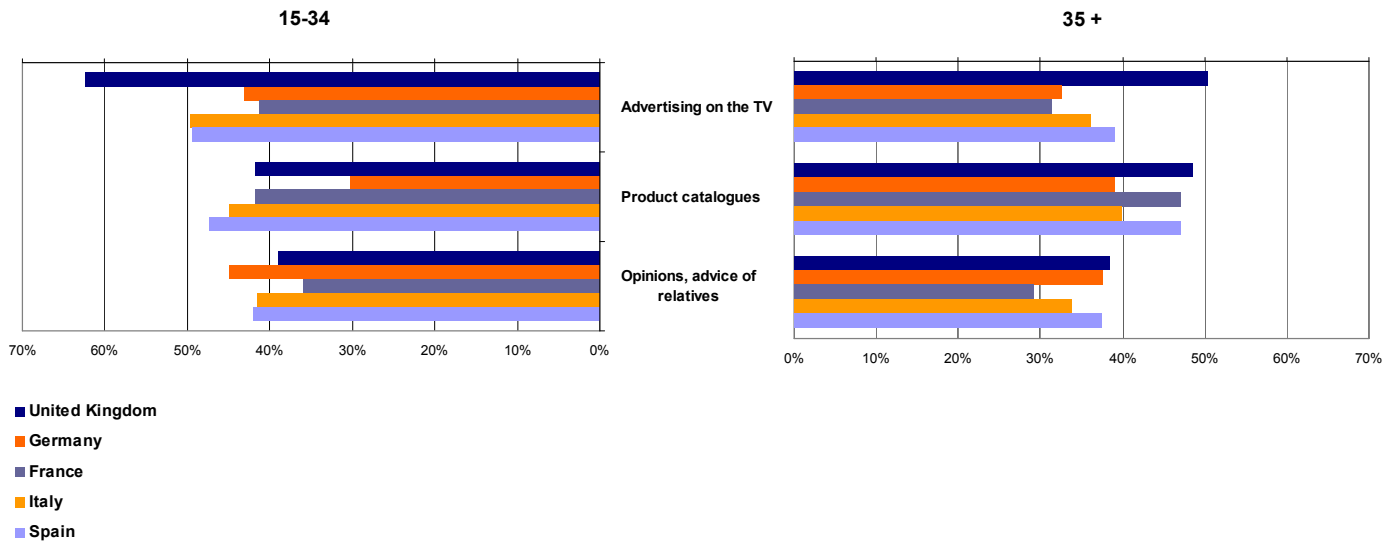
Finally, it is the British and Spanish Internet users that use their mobile the most to inform themselves while the Italians and Germans use it the most as entertainment.

**The main factors influencing the purchase decisions of European Internet users do not have the same impact depending on their age groups.**

When considering the factors guiding European Internet users purchase decisions the most, those aged 15-34 and the over 35's put forward the three same sources: advertising on the TV, product catalogues and the advice of their relatives.

These three key factors do not have the same weight in the purchase process of the two age groups. According to those aged 15-34, advertising on the TV has a very strong impact as it influences the purchase decisions of more than 40% of them. Those aged 35 and over are more sensitive to product catalogues than to advertising on the TV. Regarding the opinions and advice of relatives, they have almost the same impact on both age groups.

**Impact of the main factors influencing European Internet users' purchase decisions**  
 (Source: Harris Interactive - NetObserver® Europe, December 2007)



Let's now enter into more details in comparing the respective impacts on purchase decisions of advertising, direct marketing and external advice and opinions.

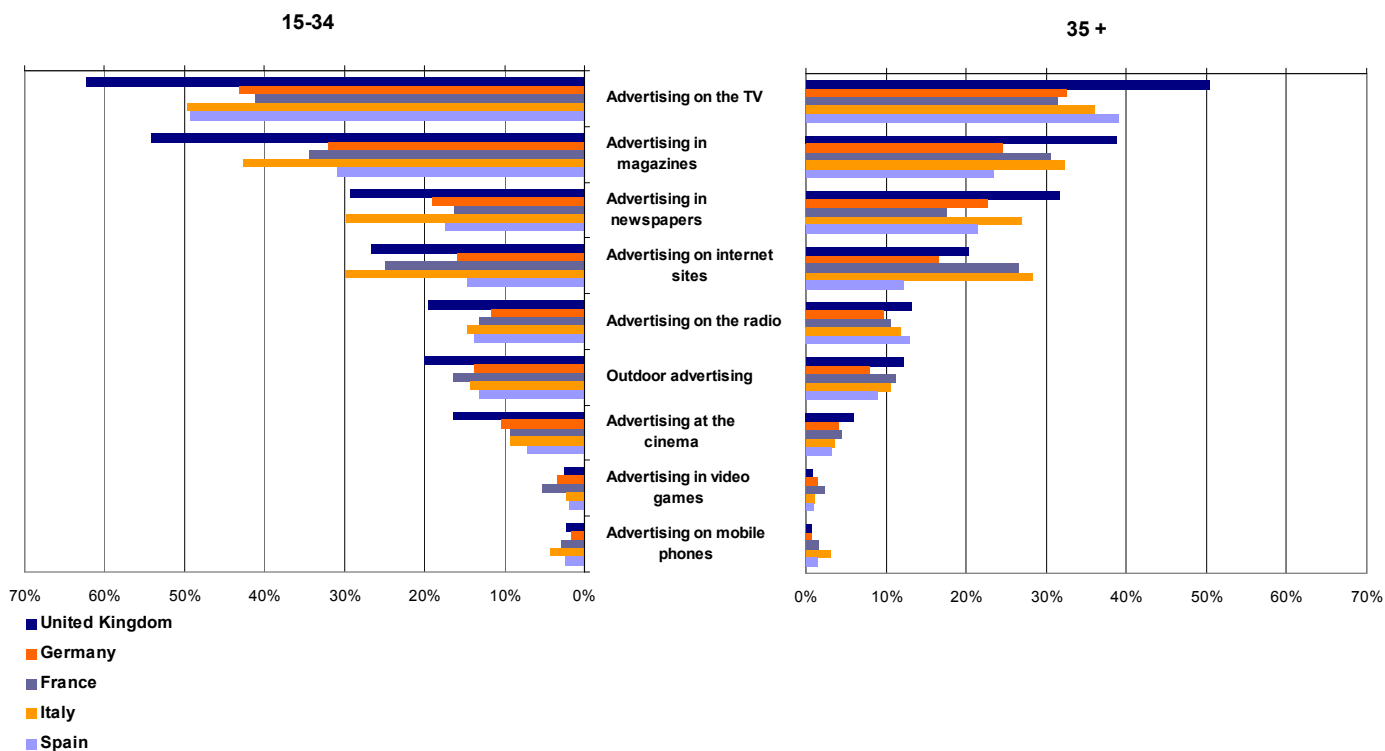
## Young Europeans purchase decisions are more influenced by advertising in media than their elders.

From an advertising perspective, the different media do not have the same influence on the purchase decisions of European Internet users depending on their age.

Both generations studied agree that TV and magazines being the two traditional media, on which advertising has the strongest influence on their purchase decisions. This influence, however, is more pronounced amongst young Europeans who are more than 40% likely to be influenced by advertising on the TV, and more than 30% are likely to be influenced by advertising in magazines. Those aged 15-34 are also more numerous than their elders to be influenced by advertising on the radio, outdoor advertising, advertising at the cinema and naturally in video games and on mobile phones. The only two media where advertising seems to have the same impact on the purchase decisions of both generations are newspapers and the Internet.

### Impact of advertising on European Internet users' purchase decisions

(Source: Harris Interactive - NetObserver® Europe, December 2007)



Amongst the most noticeable differences between the five countries, one can note that the British Internet users are more receptive than the others to advertising in any traditional media.

The Spanish and Italian Internet users are more strongly influenced by advertising on the TV.

Finally, concerning advertising on websites, it does impact the Spanish and German Internet users far less than the others.

## Direct marketing plays an important role in the purchase decisions of the over 35's

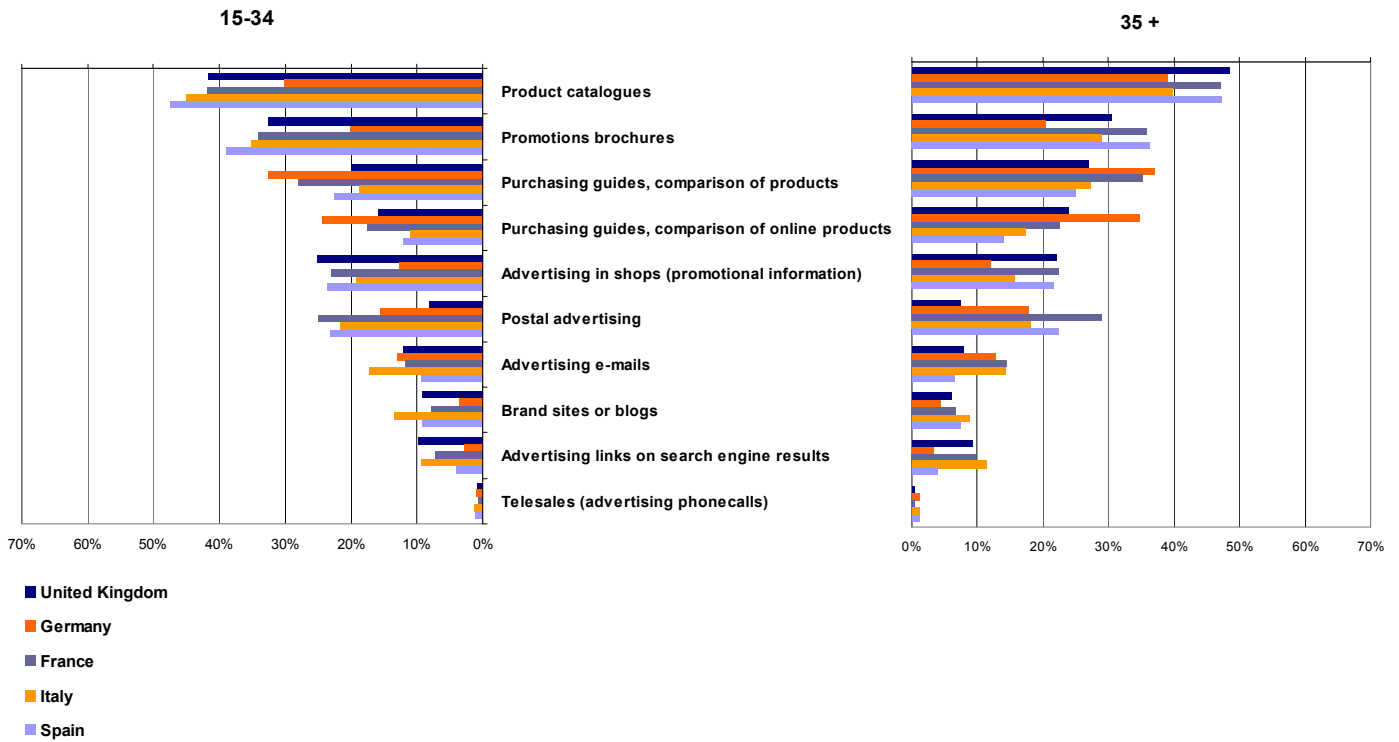
The different tools of direct (or promotional) marketing available to brands do not always have the same impact on the two generations of Internet users.

For what concerns product catalogues and promotions brochures, they play a major role in the purchase decisions of European Internet users of all ages. Close to 40% and 30% of European Internet users, respectively, say that product catalogues and promotions brochures guide their purchase decisions!

On the other hand, the purchasing guides and product comparisons, either paper guides or online guides, are mostly used by the over 35's in their purchase process. Globally these are as much influenced by comparative guides as they are by promotions brochures or advertising in magazines.

### Impact of direct marketing on European Internet users' purchase decisions

(Source: Harris Interactive - NetObserver® Europe, December 2007)



Looking at the particularities of each country, it appears that the French have more access to paper purchasing guides than other nationalities.

The Germans also use purchasing guides, not only paper but also on the Internet. However, they are much less sensitive than the others to product catalogues, promotions brochures, advertising in shops, brand sites or blogs and to advertising links on search engine results.

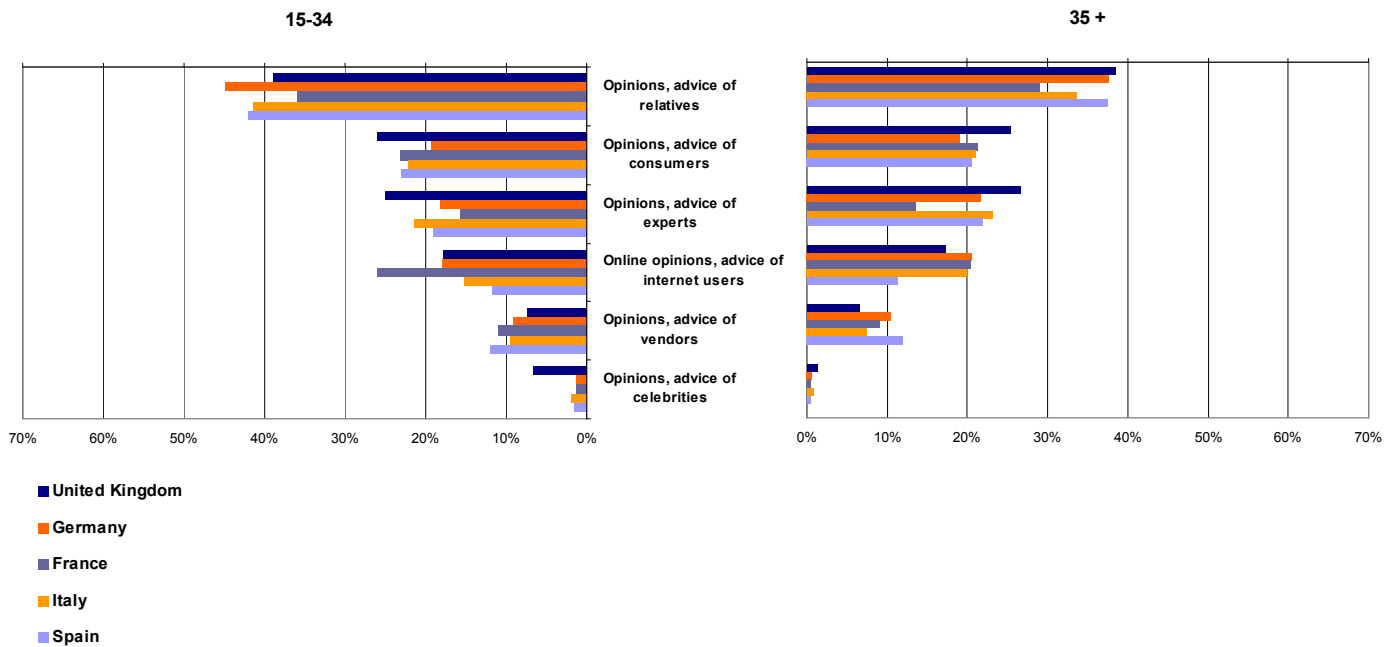
As for the British, they like neither postal advertising nor advertising e-mails.

Finally, Spanish Internet users are less influenced than others by advertising e-mails and advertising links on search engines.

## Opinions and advices have a comparable influence on the two generations of the Internet users studied

Both generations agree on the importance of advice from their relatives for their purchase decisions. Therefore, around 40% of European Internet users – whatever their age – have confidence in their relatives to guide them in their purchase process. Almost as much as advertising on the TV and product catalogues. In a more anecdotic way, one can see that young European Internet users are more sensitive, than their elders, to the opinions and advice of celebrities, notably young Brits!

**Impact of opinions and advices on European Internet users' purchase decisions**  
(Source: Harris Interactive - NetObserver® Europe, December 2007)



By looking for the characteristics of each country, one can note that the French are less inclined than others to follow the advice of peers or experts, but more sensitive to the opinions of other Internet users online. The British follow more consumer and expert opinions and neglect those of sellers. Finally the Spanish favour the advice of sellers a bit more than their neighbours and a little less notice of Internet users which they place at the same level.

## Annex:

<b>Choice of media for information and entertainment &amp; factors influencing purchasing decisions</b>										
<small>(Source: Harris Interactive - NetObserver® Europe, December 2007)</small>										
	UNITED KINGDOM		GERMANY		FRANCE		ITALY		SPAIN	
	15-34	35+	15-34	35+	15-34	35+	15-34	35+	15-34	35+
<b>CHOICE OF MEDIA</b>										
<b>MEDIA PREFERRED AS A SOURCE OF INFORMATION</b>										
TV	48%	53%	72%	81%	72%	72%	68%	73%	71%	64%
Radio	37%	43%	49%	59%	45%	59%	29%	41%	54%	66%
Magazines	29%	23%	35%	39%	36%	44%	42%	43%	40%	36%
Newspapers	71%	66%	64%	65%	68%	66%	81%	80%	85%	85%
Cinema	4%	2%	6%	4%	8%	6%	9%	6%	8%	6%
Internet	69%	68%	68%	71%	73%	75%	79%	80%	76%	77%
Mobile Phone	43%	36%	15%	14%	22%	22%	31%	34%	39%	35%
<b>MEDIA PREFERRED AS ENTERTAINMENT</b>										
TV	80%	79%	68%	57%	70%	69%	61%	57%	68%	61%
Radio	64%	56%	60%	58%	60%	45%	77%	59%	49%	32%
Magazines	58%	40%	54%	42%	60%	45%	59%	43%	57%	42%
Newspapers	19%	13%	22%	19%	11%	11%	16%	13%	5%	5%
Cinema	70%	47%	68%	43%	74%	59%	83%	66%	83%	74%
Internet	63%	44%	77%	54%	79%	59%	70%	57%	74%	53%
Mobile Phone	39%	17%	57%	24%	41%	16%	63%	32%	45%	19%
<b>FACTORS INFLUENCING PURCHASING DECISIONS</b>										
<b>ADVERTISING</b>										
Advertising on the TV	62%	50%	43%	33%	41%	31%	50%	36%	49%	39%
Advertising in magazines	54%	39%	32%	25%	35%	31%	43%	32%	31%	23%
Advertising in newspapers	29%	32%	19%	23%	16%	18%	30%	27%	17%	22%
Advertising on internet sites	27%	20%	16%	17%	25%	27%	30%	28%	15%	12%
Advertising on the radio	20%	13%	12%	10%	13%	11%	15%	12%	14%	13%
Outdoor advertising (in public places)	20%	12%	14%	8%	16%	11%	14%	11%	13%	9%
Advertising at the cinema	17%	6%	11%	4%	9%	4%	9%	4%	7%	3%
Advertising in video games	3%	1%	4%	1%	5%	2%	2%	1%	2%	1%
Advertising on mobile phones	2%	1%	2%	1%	3%	2%	4%	3%	3%	2%
<b>DIRECT MARKETING</b>										
Product catalogues	42%	49%	30%	39%	42%	47%	45%	40%	47%	47%
Promotions brochures	33%	30%	20%	20%	34%	36%	35%	29%	39%	36%
Purchasing guides, comparison of products	20%	27%	33%	37%	28%	35%	19%	27%	23%	25%
Purchasing guides, comparison of online products	16%	24%	25%	35%	18%	23%	11%	17%	12%	14%
Advertising in shops (promotional information)	25%	22%	13%	12%	23%	22%	19%	16%	24%	22%
Postal advertising	8%	7%	16%	18%	25%	29%	22%	18%	23%	22%
Advertising e-mails	12%	8%	13%	13%	12%	14%	17%	14%	9%	7%
Brand sites or blogs	9%	6%	4%	4%	8%	7%	13%	9%	9%	7%
Advertising links on search engine results	10%	9%	3%	3%	7%	10%	9%	11%	4%	4%
Telesales (advertising phonecalls)	1%	0%	1%	1%	1%	1%	1%	1%	1%	1%
<b>OPINIONS &amp; ADVICES</b>										
Opinions, advice of relatives	39%	38%	45%	38%	36%	29%	42%	34%	42%	38%
Opinions, advice of consumers	26%	25%	19%	19%	23%	21%	22%	21%	23%	21%
Opinions, advice of experts	25%	27%	18%	22%	16%	14%	21%	23%	19%	22%
Online opinions, advice of internet users	18%	17%	18%	21%	26%	20%	15%	20%	12%	11%
Opinions, advice of vendors	7%	7%	9%	10%	11%	9%	10%	8%	12%	12%
Opinions, advice of celebrities	7%	1%	1%	1%	1%	1%	2%	1%	2%	0%



**About:**  
**NetObserver®**

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With more than a 1000 participating sites and more than 400 000 respondents per year, the observatory of Internet usages, NetObserver is the biggest online study carried out in Europe today.

Carried out online every 6 months since 1998 in France and since 2000 in Europe, NetObserver tracks the evolution of behaviour and of the perception of Internet users over the age of 15, wherever their place of connection (home, work, schools, universities, public places...) in 5 markets : France, Italy, Spain, Germany and the UK.

The last study session has been carried out between the months of September and December 2007 with a global sample of more than 265 000 Internet users.

The results of the study, being weighted by enumeration data in every market, are representative of the Internet user's population of each of the 5 markets studied.

The 17th session of the NetObserver study will take place from 17<sup>th</sup> March until 1<sup>st</sup> June 2008.



**About:**  
**Harris Interactive**

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With its European headquarters in London, United Kingdom, and global headquarters in Rochester, NY, USA, Harris Interactive is a global research and consulting company known for two decades of expertise in strategic business and consumer research.

Harris Interactive plays a major role in solving its clients' complex business problems through the thoughtful application of innovative methodologies and sophisticated technologies, focusing on those that are Internet-based. In fact, we have become the world's leading experts in Internet-based market research.

The company has built one of the most important panel in the world: the Harris Poll Online. This panel consists of more than 6 million members in the world, and more than 2 million in Europe.

Our corporate family includes an independent global network of affiliate research and consulting companies. Our international scope and experience extends throughout Europe, Africa, North and South America, Southeast Asia and Australasia offering a truly global advantage.



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