



**Findings of the 17th session of the NetObserver® Europe study:
Profile comparison between regular users of price comparison sites
and regular users of brand sites or blogs**

The 17th edition of the NetObserver® survey, carried out on about 250 000 European Internet users, was committed to comparing regular online users of price comparison sites with regular online users of brand sites or blogs.

From their socio-demographic profile to their behaviour, within the domain of e-commerce and online advertising, the Harris Interactive survey has studied the main differences between the users of these two types of sites.

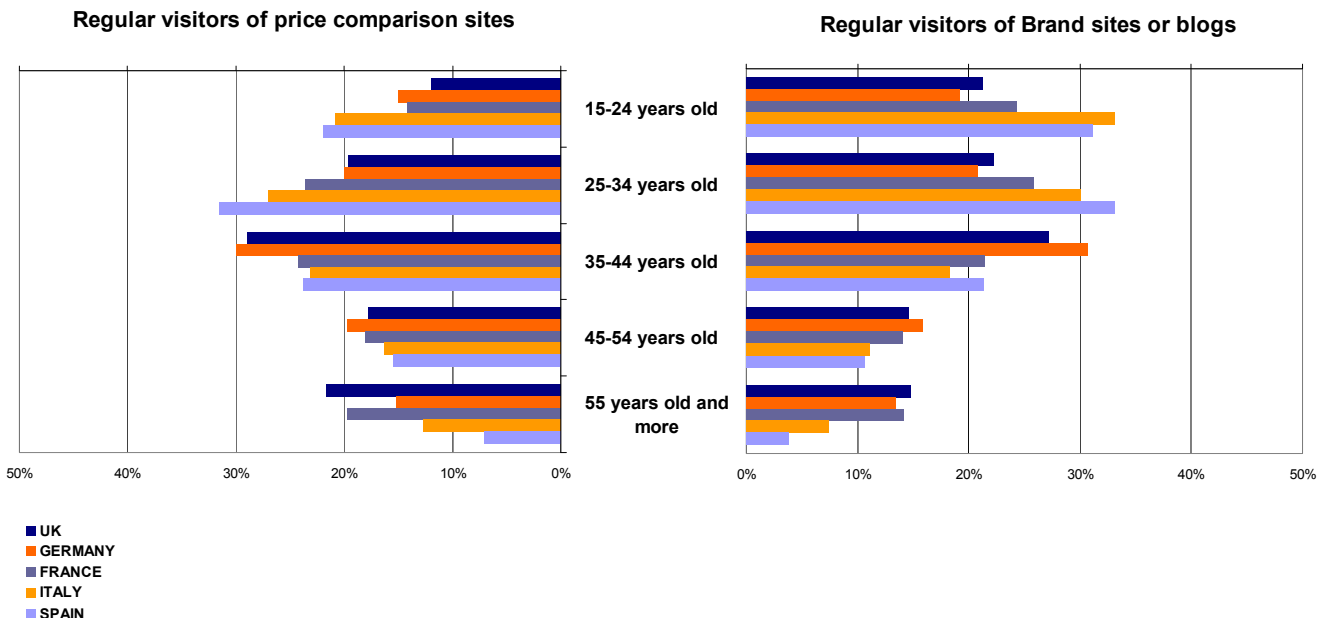
Online, price comparison websites do not attract the same audience as brand sites or blogs

Globally, whilst the regular internet users of price comparison websites are mainly men between the ages of 25-54, the users of brand sites or blogs are globally more feminine and younger, between the ages of 15-44. Amongst the main features of the 5 countries studied, Germany comes out as the exception with the audience of brand sites or blogs in this country mainly composed of men (more than 60%). Furthermore, seniors (over 55) make up around 20% of the regular visitors to price comparison websites in France and the UK!

Gender distribution of visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)



Age distribution of visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)



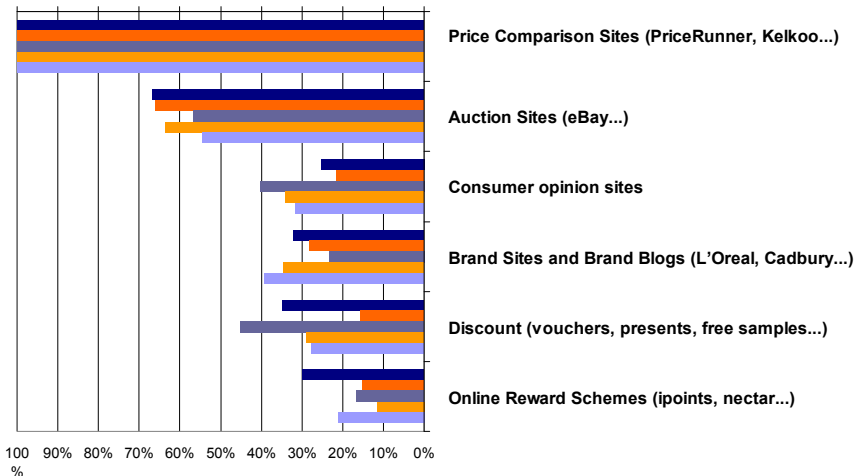
Regular users of price comparison sites differentiate themselves from regular users of brand sites or blogs through some of their online activities

Amongst the main online behavioural differences, a higher proportion of regular visitors of price comparison websites use auction sites to sell goods online, mostly in Latin countries. In these cases, they might use price comparison websites to determine a selling price for the goods they wish to sell online...

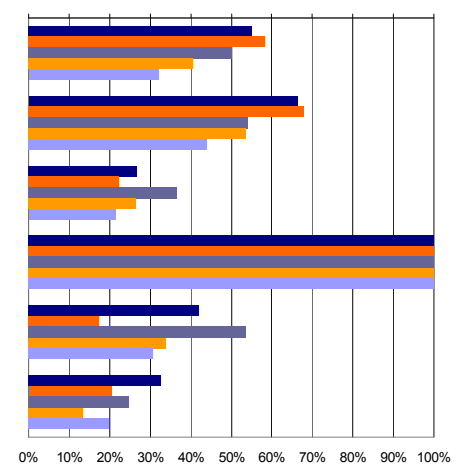
Users of price comparison websites also use consumer opinion sites more than users of brand sites or blogs do. As consumer opinion can usually be found on price comparison websites, it is therefore a "habit" for the users of this kind of websites to get this information. Nevertheless, between 20% and 40% of them, depending on the country studied, regularly visit websites dedicated to consumer opinion. A proportion equivalent to the amount of users of price comparison sites who regularly visit brand sites or blogs!

Types of sites regularly visited by the visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites

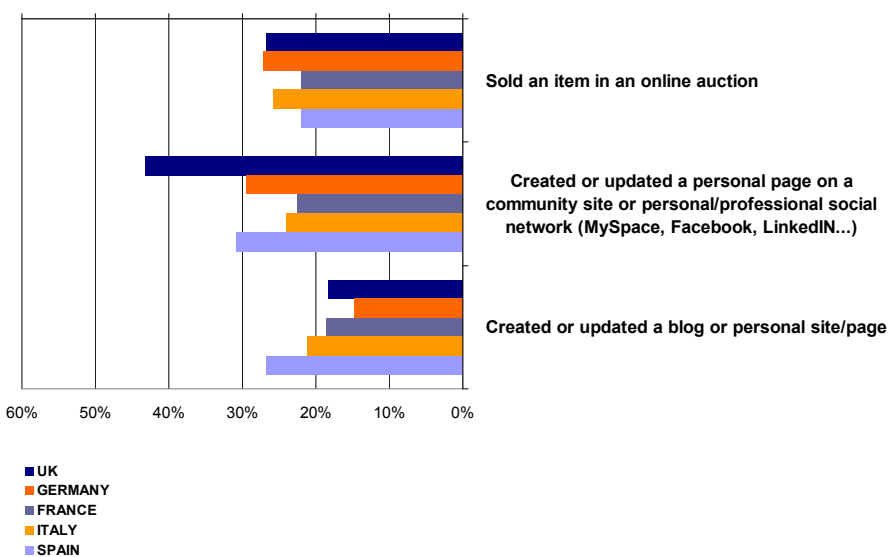


Regular visitors of Brand sites or blogs

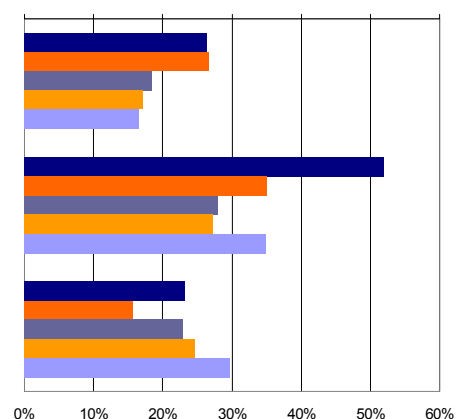


Activities carried out online within the past 12 months by the visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites



Regular visitors of Brand sites or blogs



Conversely, a high proportion of regular users of brand sites or blogs visit social networks and have their own blog. There is a strong correlation with the users' socio-demographic profile previously referred to in this document as young women are heavy users of online networks!

Still in comparison with visitors of price comparison sites, a high proportion of visitors of brand sites and blogs also regularly visit online reward schemes and discount sites on which one can get vouchers or free samples. Not surprising considering that brand sites, in their CRM strategy, often propose printable vouchers and regularly organise competitions to develop the loyalty of their customers...

Moreover, from 30% to 60% of visitors of brand sites or blogs, depending on the country studied, regularly visit price comparison websites.

Online search for information and online purchasing differentiate the users of price comparison sites from those of brand sites and blogs

Concerning their purchases, regular users of price comparison sites and those of brand sites and blogs not only do not use the Internet in the same proportion, but are not interested in the same categories of products.

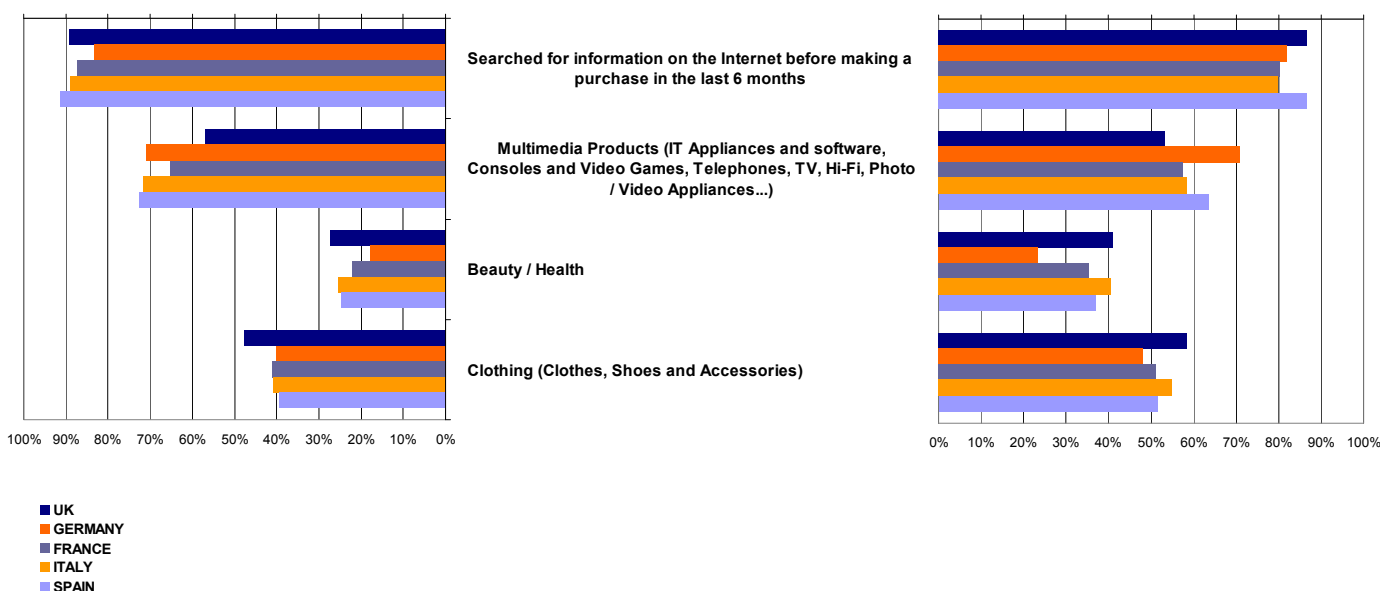
With regards to searching for information or to carrying out purchases on the Internet, the users of price comparison websites are logically more active than the visitors of brand sites or blogs. Purchasing being the main reason for visiting price comparison sites, this is not surprising. It should be noted that the amount of users of brand sites or blogs who use the internet to search for information or to carry out purchases is higher than the average of internet users. If purchasing might not be the main reason for visiting brand sites and blogs, it is still an important online activity for their audience.

Regarding products categories, users of price comparison websites are clearly more interested in multimedia products than users of brand sites or blogs. The latter are more interested in health and beauty products and clothing. Again, not surprising considering the majority of users of comparison sites are males and the majority of users of brand sites or blogs are females. For the other categories of products and services, the interest from users of these two types of sites is comparable.

Search for information online before purchasing by visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites

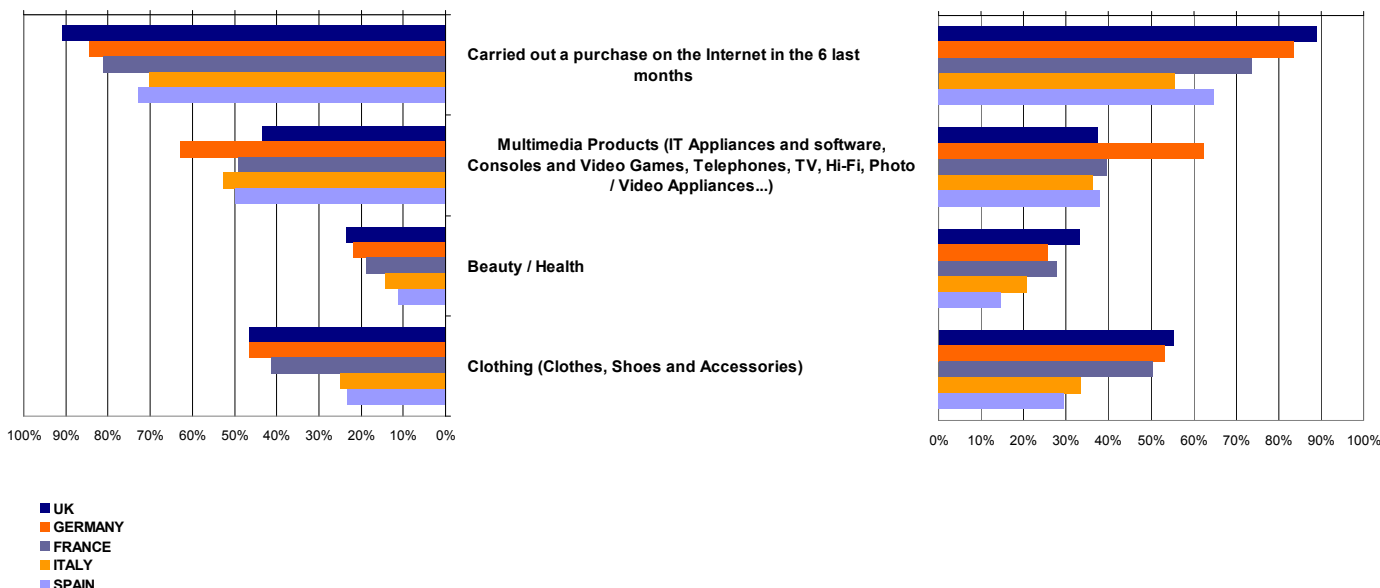
Regular visitors of Brand sites or blogs



Online purchasing by visitors of price comparison sites and of brand sites or blogs in Europe (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites

Regular visitors of Brand sites or blogs

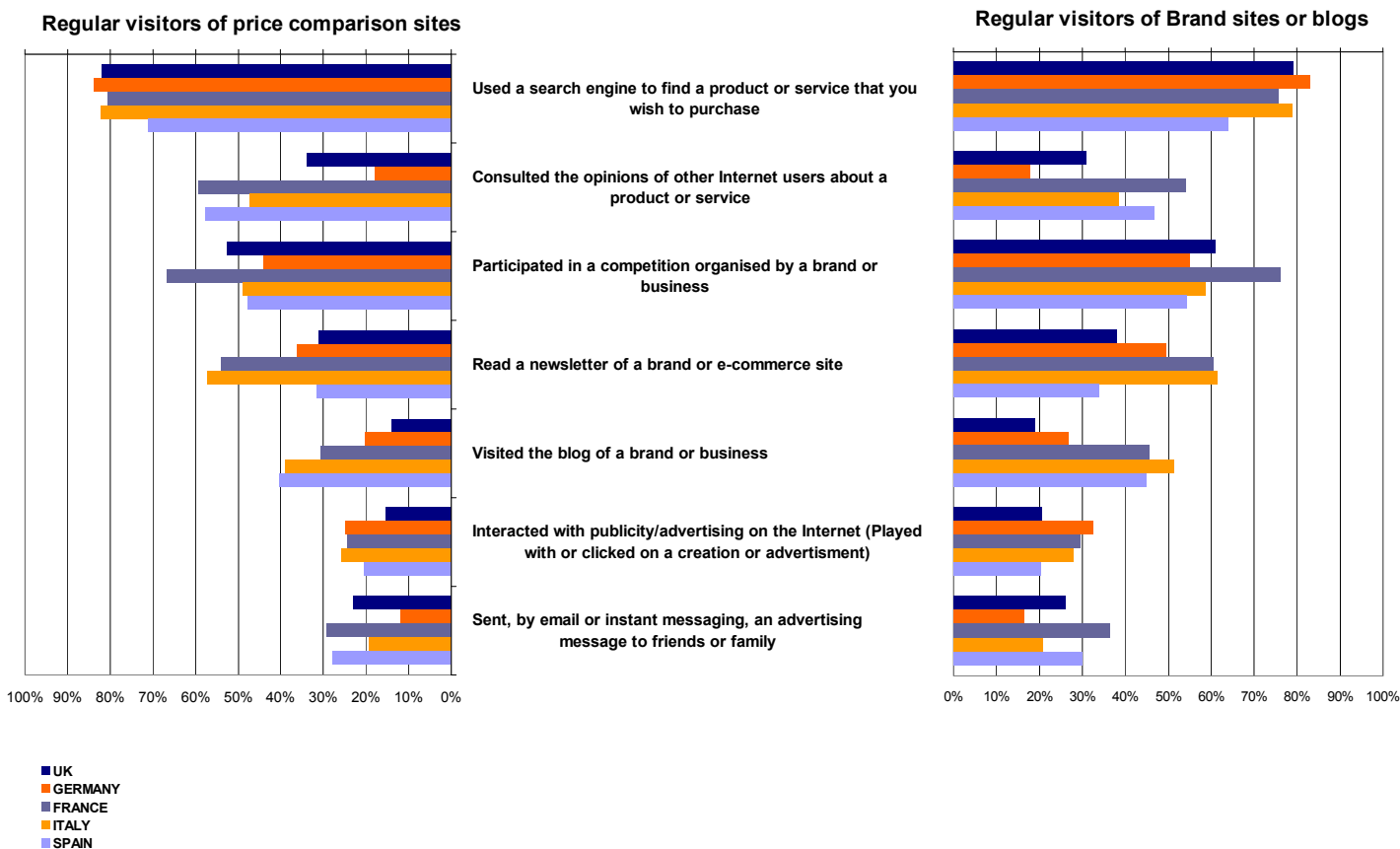


Regular users of price comparison sites also differentiate themselves from regular users of brand sites or blogs through their behaviour and perception of online marketing

Not surprising for price comparison websites, their users are more numerous than users of brand sites or blogs, not only for using a search engine to find a product or service that they want to buy (between 71% and 84%) but also for reading the opinions of other internet users about a product or service (between 18% to 59%).

On the other hand, a higher proportion of regular users of brand sites or blogs participate in competitions organised by brands or businesses (between 54% and 76%), read newsletters of brand or e-commerce sites (between 34% and 61%) or visit the blogs of brands or businesses (between 19% and 51%). Furthermore, they are more receptive to online advertising and viral marketing, on the evidence that between 20% and 33% of visitors interacted with online ads and between 16% and 36% sent advertising messages by email or instant messaging in the last 6 months.

**Online activity carried out in the last 6 months
by visitors of price comparison sites and of brand sites or blogs in Europe**
(Source: Harris Interactive - NetObserver® Europe, September 2008)

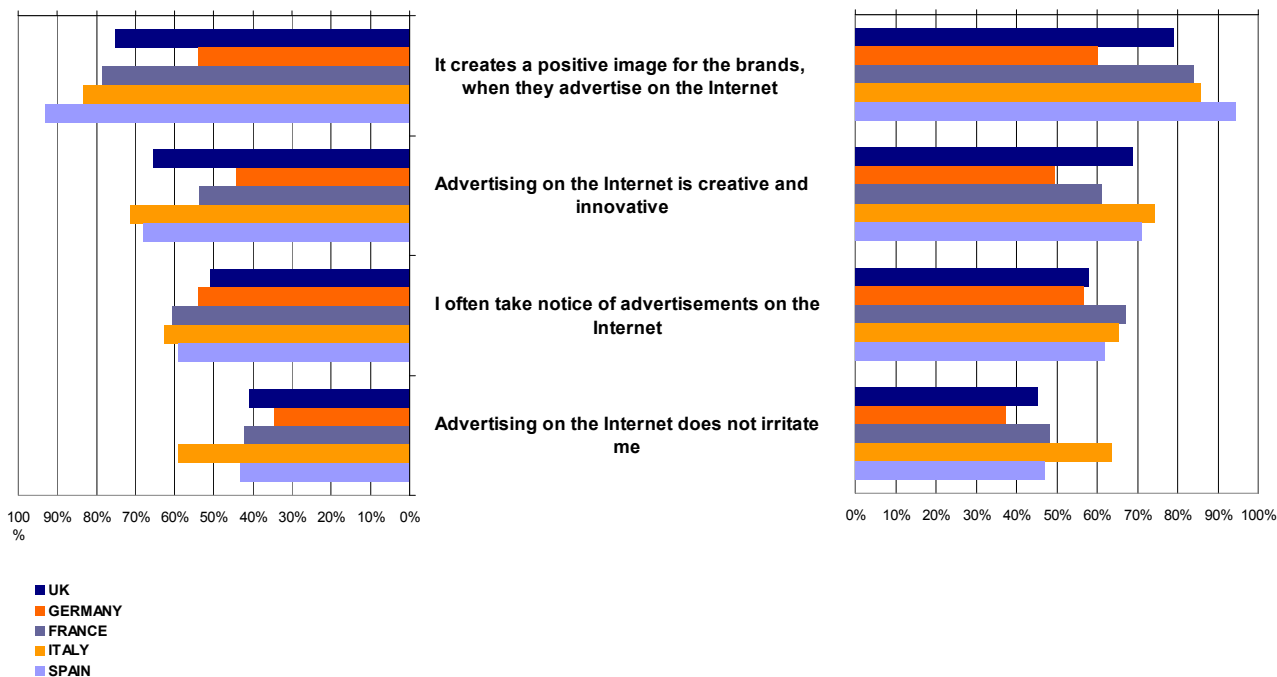


Users of brand sites or blogs have a better opinion of online advertising. There are a greater proportion of users of brand sites or blogs than of users of price comparison sites who believe that advertising on the Internet creates a positive image for a brand (between 60% and 94%). Users of brand sites or blogs are also more numerous in thinking that online advertising is creative (between 50% and 74%) and in regularly taking notice of online ads (between 57% and 67%). Furthermore, users of brand sites or blogs are less irritated by online advertising than users of price comparison sites: except for the Italians, between 37% and 48% of users of brand sites or blogs are not affected by online advertising.

Perception of online advertising by visitors of price comparison sites and of brand sites or blogs in Europe
 (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites

Regular visitors of Brand sites or blogs

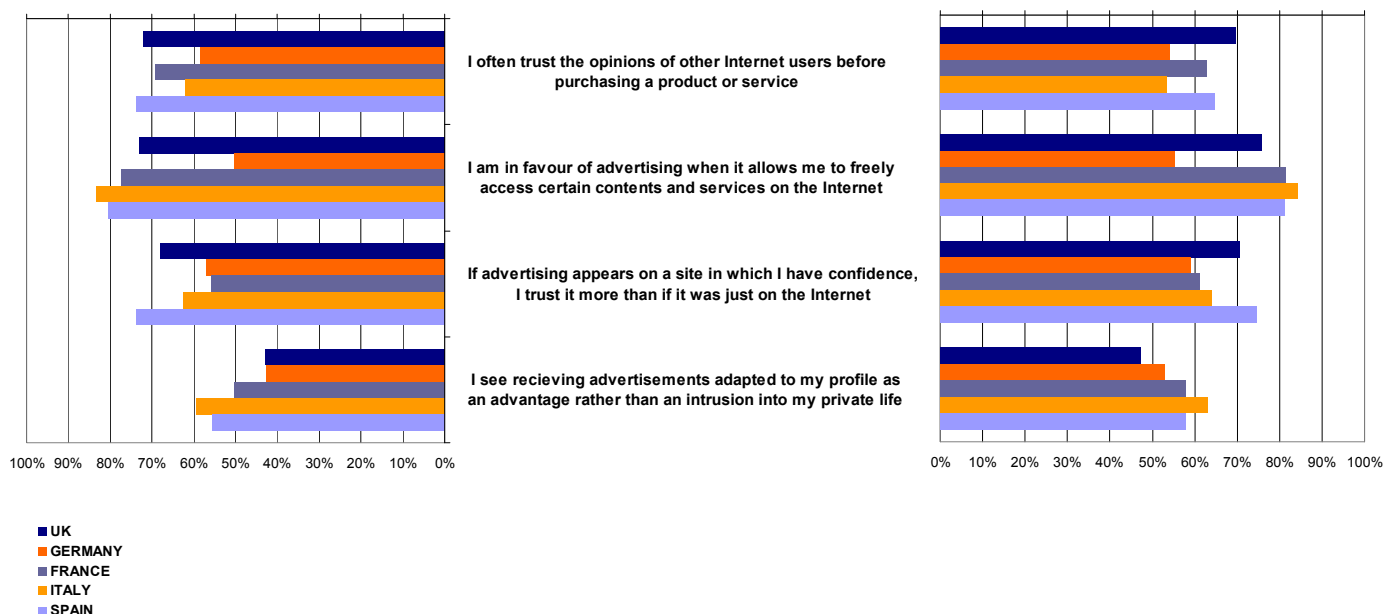


In total coherence with previous findings, a higher proportion of users of price comparison sites regularly trust other internet users opinions before buying a product or service (between 58% and 74%). They are however fewer in favour of advertising in exchange for free access to contents and services on the Internet (between 50% and 83%). Users of brand sites or blogs trust online ads more when placed on a site in which they have confidence (between 59% and 75%) and consider targeted advertising as an advantage rather than an invasion of privacy (between 47% and 63%).

Opinion of online advertising by visitors of price comparison sites and of brand sites or blogs in Europe
 (Source: Harris Interactive - NetObserver® Europe, September 2008)

Regular visitors of price comparison sites

Regular visitors of Brand sites or blogs



Profile comparison between regular users of price comparison sites and regular users of brand sites or blogs												
(Source: Harris Interactive - NetObserver@Europe, September 2008)												
	REGULAR VISITORS OF PRICE COMPARISON SITES					REGULAR VISITORS OF BRAND SITES OR BLOGS						
	UK	GERMANY	FRANCE	ITALY	SPAIN	UK	GERMANY	FRANCE	ITALY	SPAIN		
GENDER												
Male	55%	65%	56%	67%	65%	38%	62%	41%	40%	47%		
Female	45%	35%	44%	33%	35%	62%	38%	59%	60%	53%		
AGE												
15-24 years old	12%	15%	14%	21%	22%	21%	19%	24%	33%	31%		
25-34 years old	20%	20%	24%	27%	32%	22%	21%	26%	30%	33%		
35-44 years old	29%	30%	23%	23%	24%	27%	31%	22%	18%	33%		
45-54 years old	18%	20%	18%	16%	16%	15%	16%	14%	11%	11%		
55 years old and more	22%	15%	20%	13%	7%	15%	13%	14%	7%	4%		
TYPES OF SITES REGULARLY VISITED												
Price Comparison Sites (PriceRunner, Keliko...)	100%	100%	100%	100%	100%	55%	58%	50%	40%	32%		
Auction Sites (eBay...)	67%	66%	57%	64%	54%	66%	68%	54%	54%	44%		
Consumer opinion sites	25%	22%	40%	34%	32%	27%	22%	37%	27%	22%		
Brand Sites and Brand Blogs (L'Oréal, Cadbury...)	32%	28%	23%	35%	38%	100%	100%	100%	100%	100%		
Discount (vouchers, presents, free samples...)	35%	16%	45%	29%	28%	42%	18%	54%	34%	31%		
Online Reward Schemes (points, nectar...)	30%	15%	17%	12%	21%	33%	21%	25%	13%	20%		
ONLINE ACTIVITIES IN THE LAST 12 MONTHS												
Sold an item in an online auction	27%	27%	22%	26%	22%	26%	27%	18%	17%	17%		
Created or updated a personal page on a community site or personal/professional social network (MySpace, Facebook, LinkedIn...)	43%	30%	23%	24%	31%	52%	35%	28%	27%	35%		
Created or updated a blog or personal site/page	18%	15%	19%	21%	27%	23%	16%	23%	25%	30%		
ONLINE SEARCH AND PRODUCT CATEGORIES												
Searched for information on the Internet before making a purchase in the last 6 months	89%	83%	87%	89%	91%	87%	82%	80%	80%	87%		
Multimedia Products (IT Appliances and software, Consoles and Video Games, Telephones, TV, Hi-Fi, Photo / Video Appliances...)	57%	71%	65%	72%	73%	53%	71%	57%	59%	63%		
Beauty / Health	27%	18%	22%	25%	25%	41%	23%	35%	41%	37%		
Clothing (Clothes, Shoes and Accessories)	48%	40%	41%	41%	39%	59%	48%	51%	55%	52%		
ONLINE PURCHASING AND PRODUCT CATEGORIES												
Carried out a purchase on the Internet in the 6 last months	91%	85%	81%	70%	73%	89%	84%	74%	55%	65%		
Multimedia Products (IT Appliances and software, Consoles and Video Games, Telephones, TV, Hi-Fi, Photo / Video Appliances...)	43%	63%	49%	53%	50%	38%	63%	40%	36%	38%		
Beauty / Health	24%	22%	19%	14%	11%	33%	26%	28%	21%	15%		
Clothing (Clothes, Shoes and Accessories)	47%	47%	42%	25%	23%	55%	53%	50%	34%	30%		
ONLINE ACTIVITIES IN THE LAST 6 MONTHS												
Used a search engine to find a product or service that you wish to purchase	82%	84%	81%	82%	71%	79%	83%	76%	79%	64%		
Consulted the opinions of other Internet users about a product or service	34%	18%	59%	47%	58%	31%	18%	54%	39%	47%		
Participated in a competition organised by a brand or business	53%	44%	67%	49%	48%	61%	55%	76%	59%	54%		
Read a newsletter of a brand or e-commerce site	31%	36%	54%	37%	32%	38%	57%	61%	61%	34%		
Visited the blog of a brand or business	14%	20%	31%	39%	41%	19%	27%	46%	51%	45%		
Interacted with public/advertising on the Internet (played with or clicked on a creation or advertisement)	15%	25%	24%	26%	21%	21%	33%	30%	28%	20%		
Sent, by email or instant messaging, an advertising message to friends or	23%	12%	29%	19%	28%	26%	16%	36%	21%	30%		
PERCEPTION OF ONLINE ADVERTISING												
It creates a positive image for the brands, when they advertise on the	75%	54%	79%	83%	93%	79%	60%	84%	86%	94%		
Advertising on the Internet is creative and innovative	66%	45%	54%	72%	68%	69%	50%	61%	74%	71%		
I often take notice of advertisements on the Internet	51%	54%	61%	63%	59%	57%	57%	67%	65%	62%		
Advertising on the Internet does not irritate me	41%	35%	42%	59%	44%	45%	37%	48%	64%	47%		
OPINION ON ONLINE ADVERTISING												
I often trust the opinions of other Internet users before purchasing a product or service	72%	58%	69%	62%	74%	70%	54%	63%	54%	65%		
I am in favour of advertising when it allows me to freely access certain contents and services on the Internet	73%	50%	77%	83%	80%	76%	55%	82%	84%	81%		
If advertising appears on a site in which I have confidence, I trust it more than if it was just on the Internet	68%	57%	56%	63%	74%	71%	59%	61%	64%	75%		
I see receiving advertisements adapted to my profile as an advantage rather than an intrusion into my private life	43%	43%	50%	59%	56%	47%	53%	58%	63%	58%		

About: NetObserver®



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 March and June 2008 with a global sample of more than 250 000 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 18th session of the NetObserver study will take place from 15th September until 30th November 2008.

About: Harris Interactive



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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