

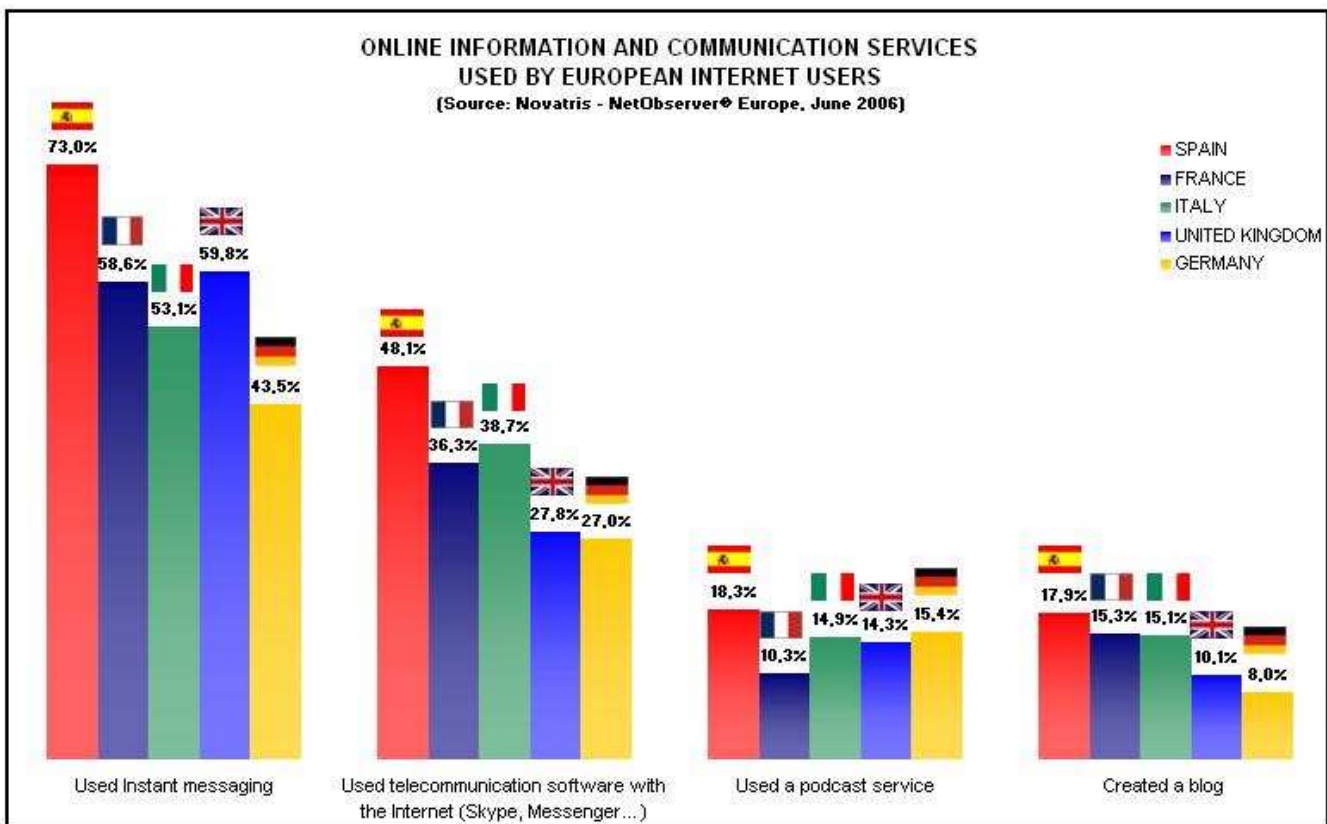


Significant discrepancies in the behaviour of European Internet Users.  
*This is the main conclusion of the 13th session of the NetObserver® Europe Study.*

**The Spanish Internet users are the biggest users of the new information and communication services offered by the Internet**

After the success of the e-mail, we have recently experienced a development in new means of information and communication on the Internet: blogs, telecommunication softwares, podcasting ...

Out of the 5 European markets (France, Italy, Spain, the UK and Germany) studied by NetObserver®, it was Spain who came out on top and Germany who tailed on the usage of new information and communication services offered by the Internet.



The Spanish Internet users are not only those who used the most communication software (instant messaging, telecommunication with the Internet) but also those who used the most podcasting services and created the most on-line blogs.

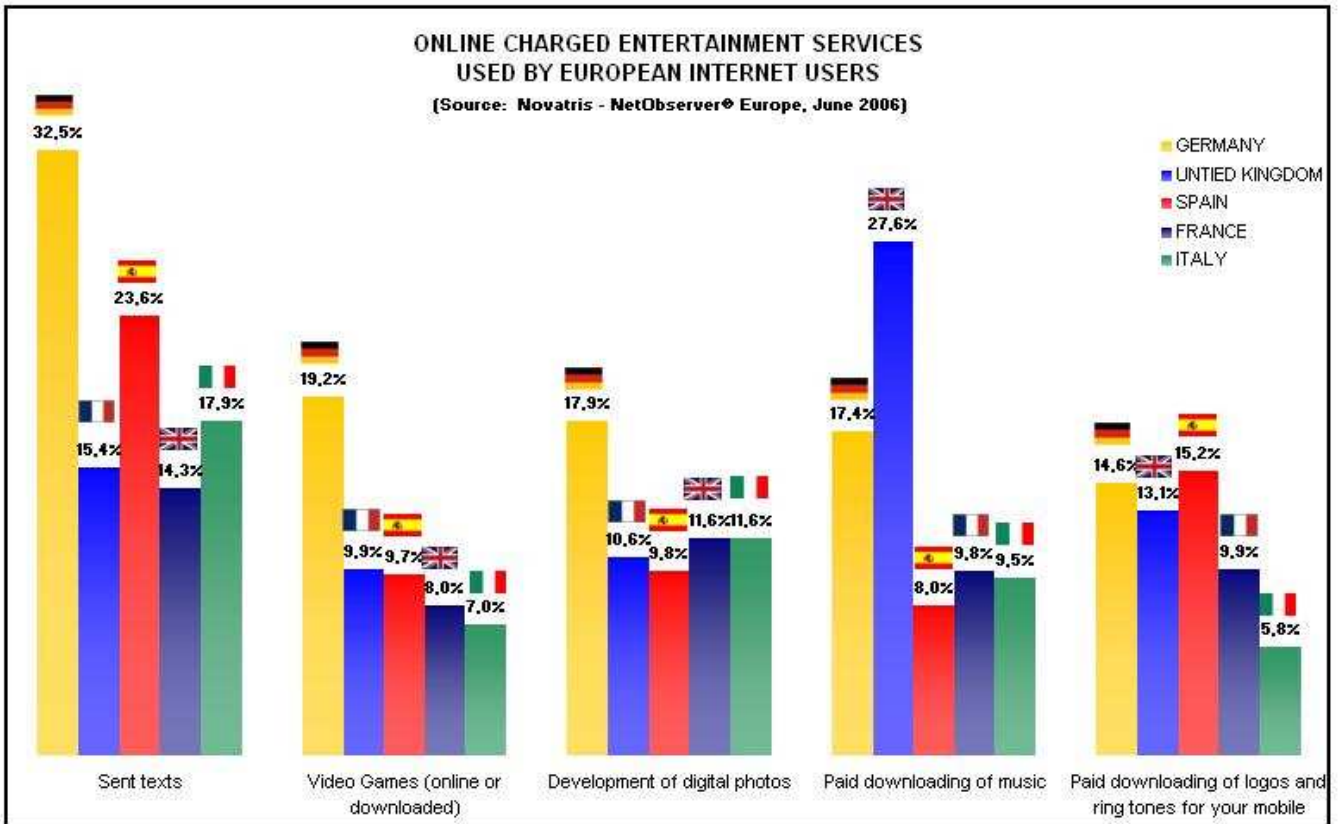
Contrary to previous expectations, mature markets like Germany and the UK are not those who take advantage of new information and communication services such as blogs or podcasting.

In reality, the fact that Spain leads on the usage of new information and communication services offered by the Internet, is less connected to the maturity of the market, than to the age of its Internet users. Out of the 5 markets studied, Spain is the country with the younger Internet users: 15-34 years old represent more than 60% of the Spanish Internet users against less than 50% on the 4 other markets studied including 40% in the United Kingdom! Even today, online communication services remain mainly used by the young generations...

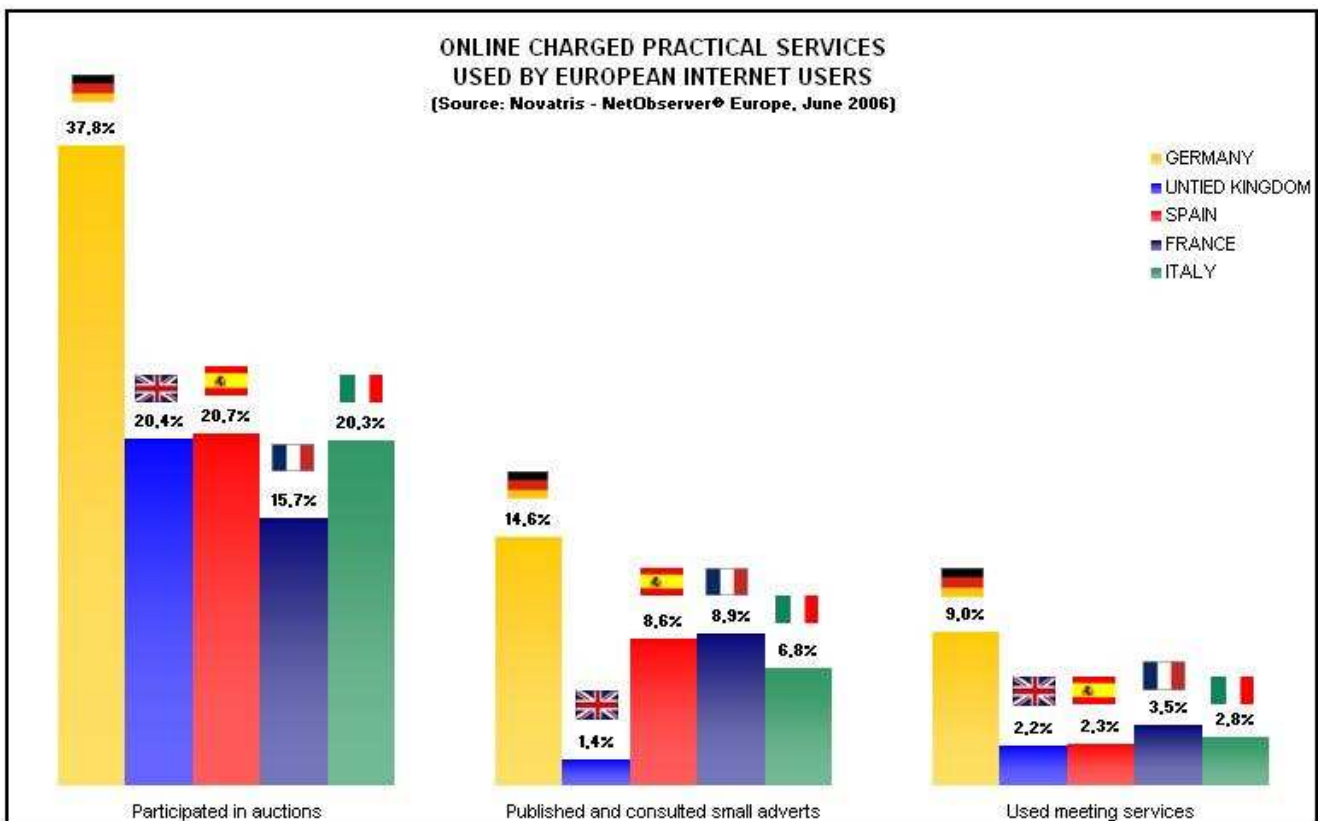
## Globally Germany comes out ahead in the use of online paid services

With regards to the usage of online paid services, it is Germany who comes out on top, especially in front of the French and Italian Internet users who seem more reluctant to purchase services online.

Starting with the entertainment services: the German Internet users are those who use the most paid services of sending SMS messages, playing video games (online or downloaded), developing digital photos and are – together with the UK Internet users - amongst those who pay the most to download music and also logos and ring tones for mobile phones.



The German Internet users also use more paid practical services (auctions, classifieds ads, meeting services...) than other European Internet users.



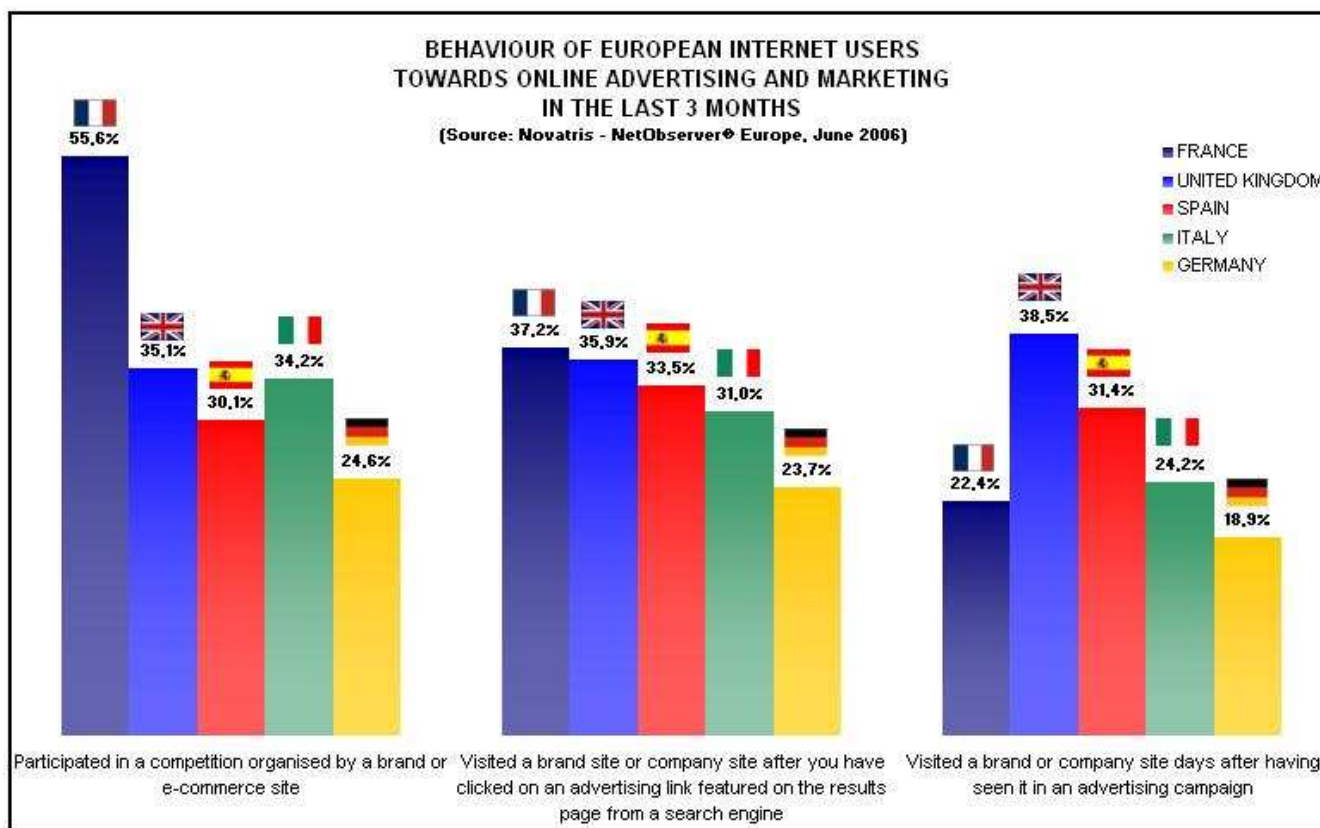
However this time, it is not the age of the Internet users that explains the differences in the usage of paid entertainment or practical services. It is not either the level of broadband penetration as German and Italian markets have less than 80% of households with broadband access, falling behind French, British and Spanish markets who have above 80% households with broadband access.

Really, the reason here is more about cultural differences between the Anglo-Saxon countries and the Latin countries regarding on-line purchases in general, whether it be products or services!

As for E-Commerce, we thus find Germany and the UK in front of France, Italy and Spain regarding the usage of online paid services.

### Globally, online marketing and advertising affects French and British Internet users the most.

Globally, online marketing and advertising affects more French and British Internet users than German internet users.



For instance, over half of French internet users declared having participated in an online competition organised by a brand or e-commerce site in the past 3 months, which is significantly more than other European internet users. Also, French and British internet users have come out ahead; having clicked on advertising links featured on the results pages from search engines in the past 3 months.

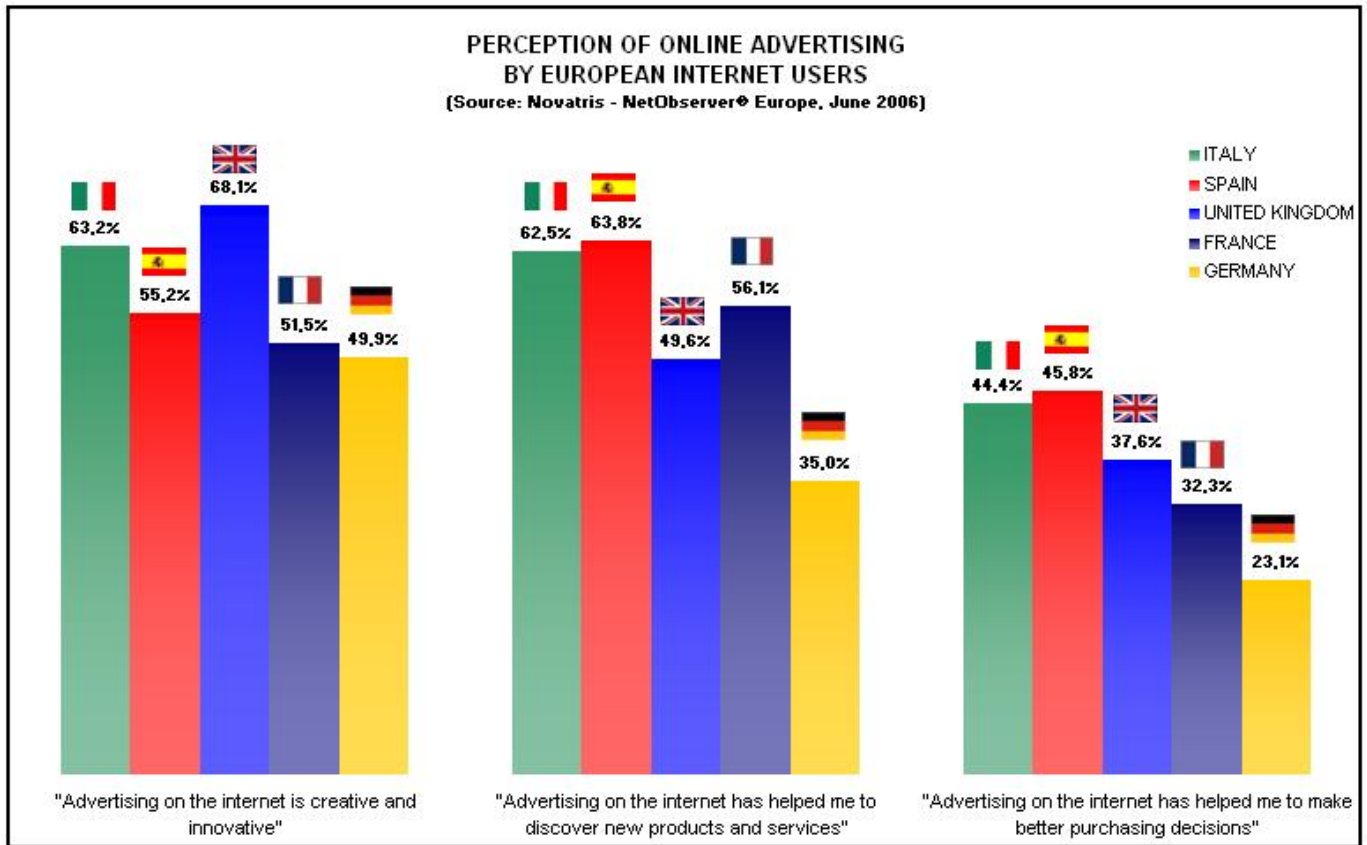
Furthermore, 2 out of 5 British internet users declared having visited a brand or company site just several days after having seen its advertisement on the internet. This confirms that only the direct click rate is not sufficient to measure the effectiveness of an online advertising campaign.

As the German market is relatively close to the French and the British markets, the gap in the levels of expenditures or saturation from one market to another is not what explains the differences in behaviour from the European internet users facing online advertising and marketing.

As a matter of fact, these differences in behaviour facing online advertising might be associated with cultural differences; the German internet users have a more negative perception of online advertising than the others...

## Globally, the perception of online advertising is more positive in Italy and Spain

The Italian internet users appreciate online advertising much more than the German internet users.



For example, 3 out of 5 Italian and British internet users perceive online advertising as creative and innovative while less than half of German internet users share this opinion!

Also 3 out of 5 Italian and Spanish internet users believe that online advertising has helped them to discover new products and services whereas approximately a third of German internet users believe this.

As well as this, only a quarter of German internet users consider that online advertising has helped them to make better purchasing decisions in comparison with almost half of Italian and Spanish internet users.

As for the French internet users, their perception of online advertising is amongst the average of the European internet users.

In conclusion, if a better advertising perception does not guarantee an immediate positive reaction to online advertising and marketing, it seems to positively contribute to it in the long term, thus promising better days for the development of online advertising in Italy and Spain.

### Annexe : Socio-demographic profile of European Internet Users.

SOCIO-DEMOGRAPHIC PROFILE OF EUROPEAN INTERNET USERS					
(Source: Novatris - NetObserver® Europe, June 2006)					
	FRANCE	ITALY	SPAIN	GERMANY	UK
<b>GENDER</b>					
Male	52,00%	58,00%	58,00%	55,00%	52,00%
Female	48,00%	42,00%	42,00%	45,00%	48,00%
<b>AGE</b>					
15-24 years old	22,00%	24,00%	24,00%	24,00%	19,00%
25-34 years old	23,00%	23,00%	37,00%	21,00%	21,00%
35-49 years old	33,00%	36,00%	29,00%	36,00%	35,50%
50 years old and more	22,00%	17,00%	10,00%	19,00%	24,50%



With more than 1000 participating sites and nearly 400,000 respondents per year, today NetObserver® is the biggest online study in Europe.

Conducted every 6 months since 1998 in France and 2000 in Europe, NetObserver® tracks the evolution of the behaviour and 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 session of the study was taken between March and June 2006 with a global sample of more than 170,000 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 studied markets.

The 14<sup>th</sup> session of the NetObserver® study will take place from September 25<sup>th</sup> to December 10<sup>th</sup>.



European specialist in interactive studies for ten years, Novatris manages a proprietary online access panel of more than 2 million Europeans. This panel is qualified using several hundreds of criteria allowing the building of reliable and representative samples of all populations.

Novatris proposes its qualitative and quantitative studies in France, Europe, United States and in Asia : on-line surveys, either by telephone or face to face, focus groups, bulletin boards...

Novatris proposes its performance studies to the principal advertisers of the market and at the same time is a provider of on line fields (service bureau) for other institutes in France and Europe.

Subsidiary of the Harris Interactive group, worldwide leader in online studies, Novatris guarantees to its clients, quality, reliability and competitive budgets thanks to a state of the art infrastructure and proven know-how.



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