Digital Influence Index Study

Understanding the role of the Internet in the lives of consumers in the UK, Germany and France

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Harris Interactive

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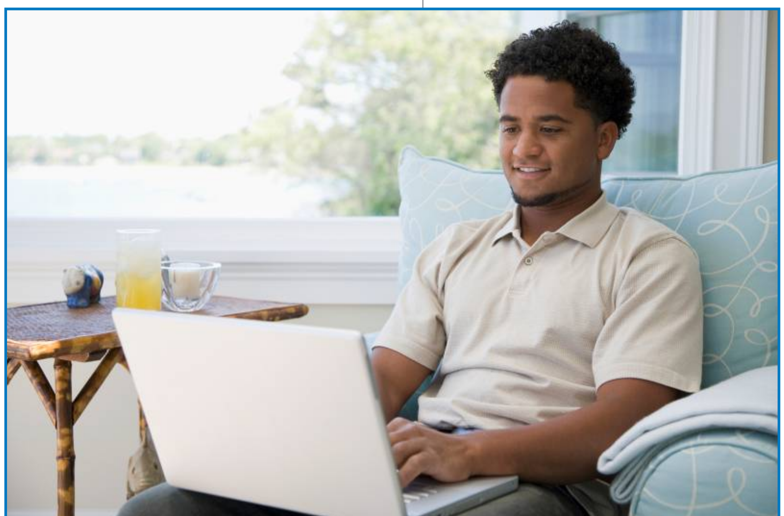
Executive Summary

In less than a generation, the Internet has clearly become part of consumers' daily lives. But what impact does it really have on how they live? And how important a role does it play in their decisions?



The Digital Influence Index Study answers those critical questions.

This study gives marketers unique and practical insights into the Web's influence on consumer behaviour and decisions in key European markets. By revealing the various ways consumers interact with companies and one another on the Web, the study gives marketers and communications professionals an unprecedented ability to decide the best way to influence those online discussions and interactions.

Working in cooperation with Harris Interactive, Fleishman-Hillard Research interviewed nearly 5,000 Internet users in the United Kingdom, Germany, and France. The survey was designed to measure media consumption patterns, Internet behaviour and attitudes, and involvement with online social networking, as well as to assess the Internet's influence on specific decisions — from purchasing to politics, healthcare to finance.

"The Internet is by far the most important medium in the lives of European consumers"

For purposes of the study, media "influence" is defined as a combination of the time consumers spend on each medium and the importance attached to each medium in their daily lives. A set of common indexes was created to permit comparisons among different media and enable the reader to examine each medium's absolute and relative impact.

The study revealed five key insights:

No. 1: Digital Influence: The Internet is by far the most important medium in the lives of European consumers — but companies are underinvesting in that influence.

Across all three countries addressed by the study, the Internet has roughly double the influence of the second strongest medium — television — and roughly 10 times the influence of printed media. Globally, however, online advertising captures only 7% to 8% of the total advertising market (source: Zenith Optimedia for Ad spend, 2007). This suggests a need and an opportunity for companies to reprioritise their focus and spending to address this shift in consumer influence.

No. 2: Behavioural Framework: Consumer use of the Internet falls into five distinct classes of behaviours. Smart marketers will clearly understand the mix of behaviours that is most critical to their business — and formulate integrated campaigns to address that mix.

Web 1.0 behaviours — research, communication, and commerce — are the most well-established online behaviours; almost all consumers use the Internet to find information to better inform their decisions. That makes it critical for companies to actively manage their digital presence through search engine optimisation (SEO) and provide a clean and easy-to-use Web site landing page.

In the expanding *Web 2.0* environment in Europe, as reflected in the U.K., Germany, and France, consumer-generated content is rapidly rising in importance. Via blogs, social networks, and product-rating sites, consumers are conducting online conversations — often on a global scale — about companies and brands. Companies need to monitor these conversations and launch open and honest outreach campaigns to promote and protect their brands. And because so many consumers use Wikipedia as a key source of information, companies also must actively engage in shaping their Wikipedia entries or risk being defined by others.

As consumers begin to embrace the *Web 3.0* behavior of consuming Internet content on smart mobile devices, companies need to ensure that their content is mobile-ready.

No. 3: Consumers use the Internet in different ways to make different decisions. The differences are driven by the impact of the decision on their lives and the range of available choices.

As noted above, consumers routinely search the Internet for information that will help them make decisions. But the mix of information they seek from company-controlled sources vs. consumer-generated sources varies by the type of decision.

For example, consumers are likely to make transactional decisions on such commoditised items as utilities or airline tickets without consulting other online consumers, relying instead on company-controlled content. However, when it comes to making decisions that involve many choices or that have a great deal of personal impact (e.g., healthcare options or major electronics purchases), consumers are more likely to seek the opinions of others though social media and product-rating sites.

This mix will likely continue to change as adoption of Web 2.0 technologies in Europe advances. Marketers and communications specialists can use this study’s insights into more than 30 types of consumer decisions to help them develop the right digital strategy to influence specific consumer choices.

No. 4: Consumers see the clear benefits of the Internet to their lives, but they still have strong concerns that need to be addressed.

The Internet's rising influence on consumers' lives is clearly tied to the benefits they derive from it. Chief among those benefits: The Internet saves them time, helps them stay connected with friends and family, and helps them make better, more informed decisions.

As much as they value these benefits, European consumers in the U.K., France, and Germany still have strong concerns about Internet safety and about the trustworthiness of the information they find online. To overcome these concerns, any organisation's digital engagement with consumers must be based on an open and honest representation of interests and positions. To do otherwise will likely backfire.

No. 5: Although most survey results were consistent across all three countries studied, several interesting distinctions emerged:

- U.K. consumers are the most likely to have created an online profile site on a social networking page.
- Germany leads the three countries in Web research and Web 2.0 publishing; German Web users evidently like to express their opinions online but are careful to check their facts.
- French consumers are the most engaged in digital communications — two-thirds of Web users own a webcam and three-fourths use instant messaging.

Insight No. 1: Digital Influence: The Internet is by far the most important medium in the lives of European consumers — but companies are grossly underinvesting in that influence.

When the Internet began its rapid growth in the mid-’90s, a debate formed as to the potential impact of the new medium. Those who thought that it was a transformative technology theorised that consumers’ ability to interact directly with the Internet and select when and where they engage content would one day make it the most influential communications medium. Based on this study, that day has come. The Internet is now the most influential medium, and the impact of traditional media continues to recede.

The Internet is almost twice as influential as television.

In all three countries, the Internet is ranked as the most influential of all media, with index scores of 44% in the U.K., 45% in Germany, and 46% in France. These percentages show that the Internet has roughly double the influence of the second-strongest channel — television — in each country and roughly 10 times the influence of newspapers.

In the Digital Influence Index’s methodology, media “influence” represents the amount of time consumers spent on a given medium combined with the relative importance they attach to that medium. So, although U.K. consumers spend slightly less time online than watching television (30% online compared with 38% for television), when the influence of each medium is taken into account (42% for the Web, 23% for television) the Internet is by far more influential.

France and Germany show similar results, although in both of those countries, consumers not only attach more importance to the Internet, they spend more time on it as well.

Consumers increasingly prefer to get their news online instead of from traditional printed media.

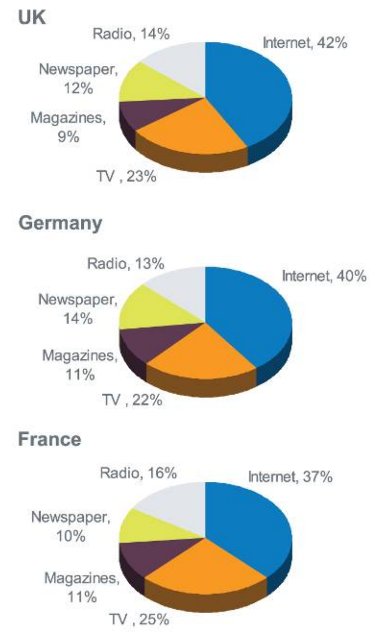
Traditional forms of printed media appear to have been the most affected by the rise of the Internet’s influence.

- In Germany, the influence of printed newspapers comes in at 7%, with printed magazines at 4%.
- The numbers are even lower in the U.K. and France, where printed newspapers account for only 5% and 3% of media influence, respectively. In both countries, printed magazines scored only 3%.

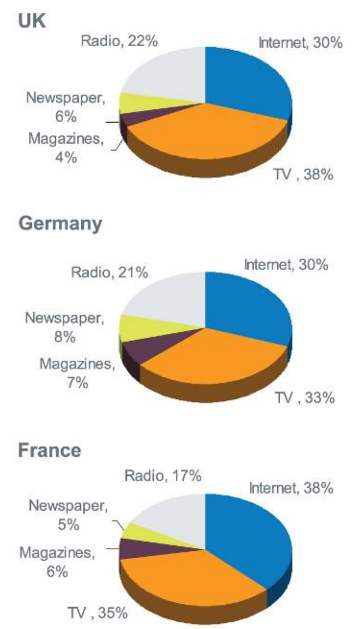
Note that the key word here is “printed” versus “print.”

Consumers continue to have a healthy appetite for journalism — but they increasingly prefer to get their news through online channels versus traditional printed newspapers and magazines. Those online channels certainly include the Web sites of traditional print publications. In fact, one could argue that the digital form of the written word is more powerful than its ink-on-paper predecessor, thanks to the convergence of several factors:

Share of Influence
(Based on Point Allocation)



Share of Time



- Search technologies enable consumers to find the news of greatest relevance to them.
- News delivered online is time-insensitive — the news of the moment is immediately available while yesterday's (or last week's or last year's) news is easy to access. This contrasts with the traditional print cycle that delivers news on the publisher's daily, weekly, or monthly schedule, and that makes access to the past more difficult.
- Online news gives the consumer the opportunity to interact with the news, as writers more directly engage their readers by establishing comment sections, a Web 2.0 technology.

Whether their words are delivered online, on paper, or both, the bulk of the print news we consume is still produced by journalists working in more or less traditional news operations. In contrast, the way consumers perceive the news in the online world is changing in one significant way: The line is blurring between traditional journalists and bloggers, in part because the two are increasingly one and the same. More and more journalists are embracing the online form by periodically blogging brief articles, reviewing the comments of their readers, and then, in some cases, responding with a more in-depth article for publication through their flagship news platforms.

The strength of consumers' preference for receiving their news online is also borne out in this study's findings about consumption of printed media:

- In the U.K., 28% of online consumers do not read printed magazines in an average week, and 26% do not read a printed newspaper.
- In Germany, 13% of online consumers do not read printed magazines in an average week, and 14% do not read a printed newspaper.
- In France, 18% of online consumers do not read printed magazines in an average week, and 25% do not read a printed newspaper.

The marketing mismatch — online media have far more influence but get far less budget.

Given that the Internet is twice as influential as television and up to 10 times more influential than printed newspapers, one would expect this to be shown in the proportion of marketing and advertising spending devoted to this channel. But, although some resources are shifting to the Internet, a large gap remains.

In Europe, the U.K. is leading the way in this shift, with the Internet accounting for nearly 15% of advertising spend in the first half of 2007 (Internet Advertising Bureau). That places online ad spending ahead of direct mail (11%) but behind first-place television (22%), press display (20%), and press classifieds (16%). This 15% share is a large leap from the 11% share online had in the first half of 2006, when France and Germany were at 9.5% and 9%, respectively, according to figures from IAB Europe.

Insight No. 2: Behavioural Framework: Consumer use of the Internet falls into five distinct classes of behaviours. Smart marketers will clearly understand the mix of behaviours that is most critical to their business — and formulate integrated campaigns to address that mix.

Behavioural Framework

With the Web clearly defined as the most influential media for online consumers, the researchers looked deeper into behaviours and the role these behaviours play in the influence of the media.

The study examined 42 wide-ranging Internet behaviours and divided them into five classes that reflect the most important ways consumers use the Internet. As the following diagram shows, we arranged these classes of behaviour according to the rough chronological development of Internet technology:

	Behaviours	Examples
Web 1.0	People consume content on the internet to find information that helps them make decisions or as entertainment.	Read information on politics and current events
	People use the internet to communicate with other people.	Use instant messaging
	People use the internet to purchase goods and services or actively manage finances.	Make purchases online
Web 2.0	People use the internet to express themselves by generating content.	Rate products and services
Web 3.0	People are free from the fixed points and use internet technologies while on the go.	Surf the Internet – mobile device

The Five Classes of Internet Behaviours

Web 1.0 Behaviours

***Research*:** People search the Internet for information, either to help them make decisions or as entertainment.

- This earliest class of Internet use includes such activities as reading information on politics and current events or looking for entertainment online.
- A large majority of consumers use the Internet for various kinds of research, but what do they most commonly search for? On average across the three countries studied:
  - Price-comparison sites are by far the most common research targets, consulted by 85% of consumers.

- About two in three consumers use the Web to read up on current events (71%) and research flights and hotels (68%).
- Many online consumers research events in their area (70%), look up local retailers (66%) and seek out information on medical conditions (55%).
- Wikipedia is well-established (65%) as a source for information.
- At a 31% adoption rate, blogs have not yet become a mass-market research destination but are significant enough research targets to warrant attention.

***Communication*:** People use the Internet to communicate with other people.

- This class of online behaviour includes older technologies such as e-mail as well as newer technologies like VoIP (Voice over Internet Protocol).
- Adoption of these behaviours is mixed; although e-mail use is nearly universal, the use of such technologies as instant messaging is still developing.
- On average across the three countries studied, e-mail is by far the dominant behaviour, with an adoption rate of 99% . Adoption drops to 55% for sending and receiving instant messages and 30% for posting comments on Web sites.
- While 20% talk over VoIP, only 19% of consumers play interactive video games online.

***Commerce*:** People use the Internet to buy or sell goods and services or actively manage finances.

- This third class of early Internet behaviours formed the basis for the “dot.com” boom of the late 1990s.
- Adoption of this behavior signals growing consumer confidence in the security of the Internet because these activities require the online sharing of personal information.
- On average across the three countries studied, shopping online (79%), managing bank accounts (78%), paying bills (63%), and buying from an auction site or classified advert (61%) are mature behaviours. Paying to download content (24%) and buying and selling investments (11%) are not.

Web 2.0 Behaviours

***Publishing*:** People use the Internet to express themselves by generating content to share with others.

- Publishing is an extension of Web 1.0-based technologies, but now content is produced by consumers, not companies.
- Web 2.0 behaviors understandably have a lower adoption rate than older behaviours. Adoption of publishing behaviors signals a willingness to extend one’s personality to the Internet and use the technology to build and maintain communities of interest. These behaviours are growing fast but are still in the minority.
- On average across the three countries studied 39% of consumers have rated movies, restaurants, or products online; and 29% have uploaded photos
- 20% of consumers have created a profile on a social network.

- Despite the hype around new forms of research and communication, just 10% of consumers blog and only 8% contribute to wikis.

Web 3.0 Behaviours

Mobility**:** People are free from the fixed points and use Internet technologies while on the go.

Web 3.0 is an enabling technology that will liberate consumers from the limitations of PC's and laptops and put the power of the Internet in their hands, anytime, anywhere. Although there are competing definitions of Web 3.0, for this study we have adopted the concept that focuses on mobility as the major factor that will transform the way consumers use the Internet.

- Adoption is presently limited by constraints on bandwidth, device design, and pricing, but in the near future, Internet mobility will be the next major wave of change.
- On average across the three countries studied, people use mobile devices for communicating far more than for researching or publishing. Eighty-three percent of consumers send and receive text messages, and 52% take pictures using a mobile device, but using that device to surf the net (16%), send and receive e-mail (15%), and watch video (7%) are clearly not common behaviours. Playing games (29%) and music (29%) have a stronger adoption rate.

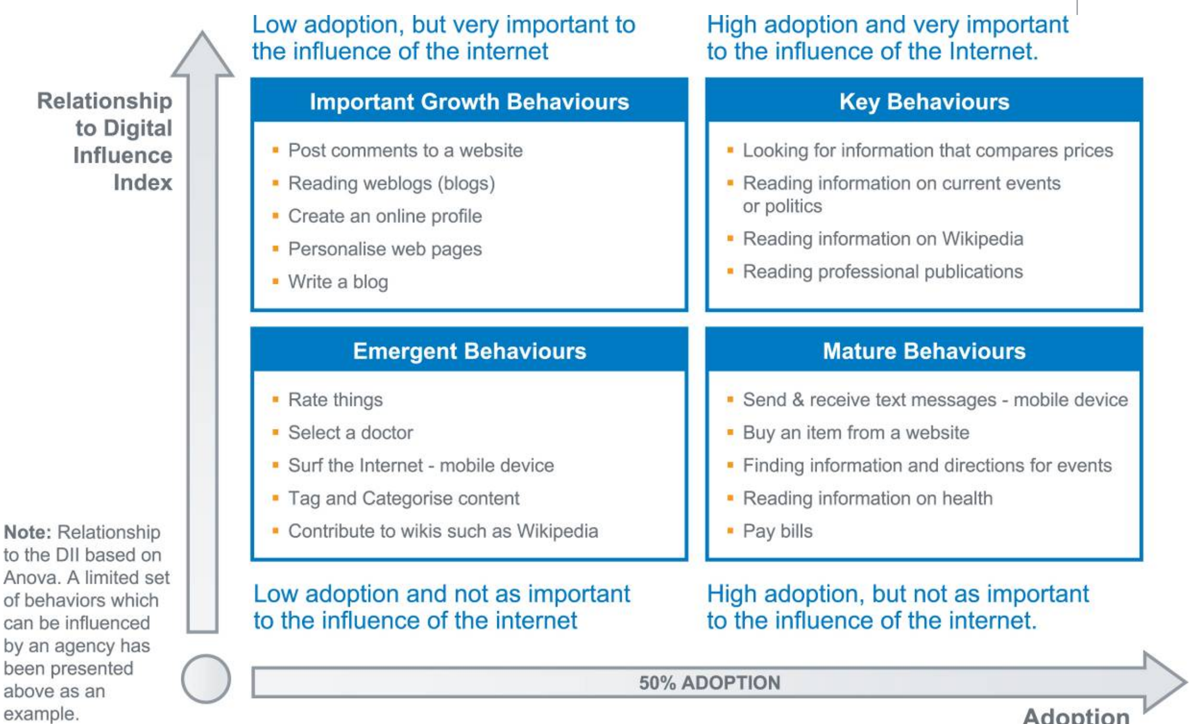
What impacts do these Internet behaviours have on decisions?

Studying the adoption of specific Internet behaviours was only the first step toward one of the key objectives of this study: to examine the influence of these behaviours on the lives of consumers. That is the information marketers need in order to effectively tap into those behaviours that present opportunities for their brands.

The Digital Influence Index Study classified all behaviours into four categories. For the purposes of this report, only those behaviours that are most relevant to a broad range of companies are presented below:

- **Key Behaviours** — such as comparing prices and reading information on sites and Wikipedia — are already widely adopted and have a high influence on Web users.
- **Important Growth Behaviours** — such as commenting on or writing a blog — may have a low adoption right now but have a large influence on users who have adopted them.
- **Mature Behaviours** — such as texting, e-mail, and paying bills — are well-adopted but are not influential. In a sense, these behaviors are entry-level items for marketers and well-accepted behaviours among broad audiences.
- **Emergent Behaviours** — such as rating products or services, mobile surfing, and contributing to Wikipedia — have a low adoption right now and are not as influential as the Key Behaviours. They are likely to rise in influence in coming years as technology and declining costs remove barriers to adoption.

Marketers and communications specialists need to fully understand the myriad behaviours and corresponding layers of influence that connect a brand and its audiences. Marketers can use these insights to help them map these behaviours as a critical step toward an online communications plan. This plan should align specific communications approaches and activities with key influencers and audience groups and their behaviours and needs, moving along a continuum from prospect to customer to advocate.



Insight No. 3: When making decisions, consumers use the Internet in different ways, driven by the impact of the decision on their lives and the range of available choices.

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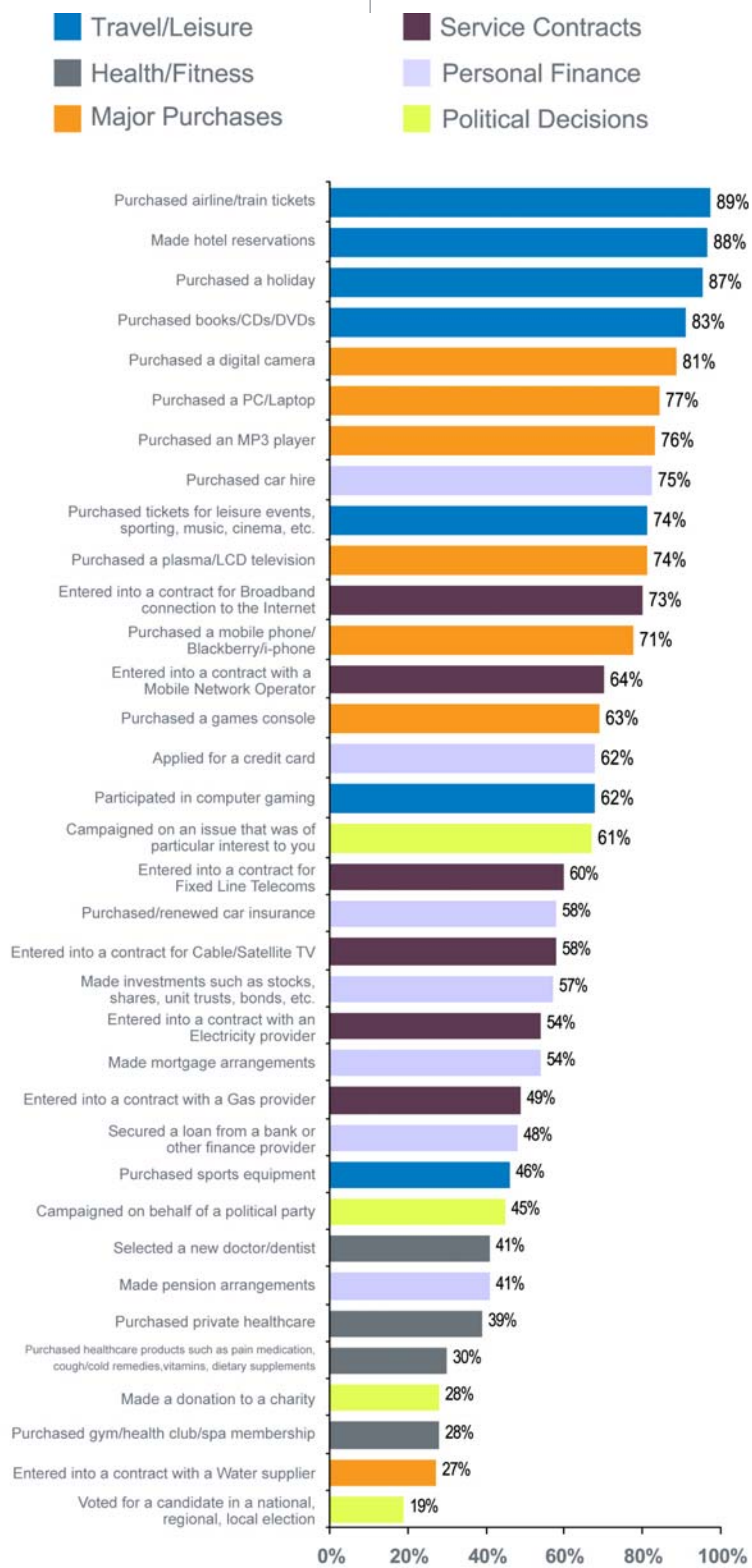
Which types of consumer decisions are most influenced by the Internet?

The Internet has become such an integral part of everyday life that it influences consumer decisions on a wide variety of everyday activities, from booking a holiday trip and switching a gas supplier to applying for loans and buying a new laptop.

Marketing professionals need to be aware of how consumers in their industry are influenced by the Web so that they can align their strategies with the role that key online behaviours play in shaping purchasing decisions and other consumer choices.

To investigate the role of the Internet on consumers' decision-making process, the researchers studied the Internet's influence on 35 types of life decisions. These decisions were grouped into six major categories. The categories are summarized below, in descending order of digital influence:

- **Travel and Leisure** is the industry in which the consumer choice is most influenced by the Internet. Nearly nine out of 10 Web users reveal they are influenced by the Web when they buy airline or train tickets (89%), book hotels (88%), or arrange a holiday online (87%).
- **Major Purchases** represent another important area in which people are turning to the Internet for guidance. The vast majority say they were influenced by the Web when buying a digital camera (81%), laptop (77%), LCD television and MP3 player (76%), or game console (63%).
- **Personal Finance** decisions are the next most likely to be influenced by online sources. More than half of Web users say the Internet has shaped decisions on applying for a credit card (62%), renewing car insurance (58%), making investments (57%) and making mortgage arrangements (54%).
- **Service Contracts** are another type of transaction that sends consumers to the Web. The Internet influences more than half of users when arranging contracts with mobile phone (64%), fixed line phone (60%), and other utility providers.

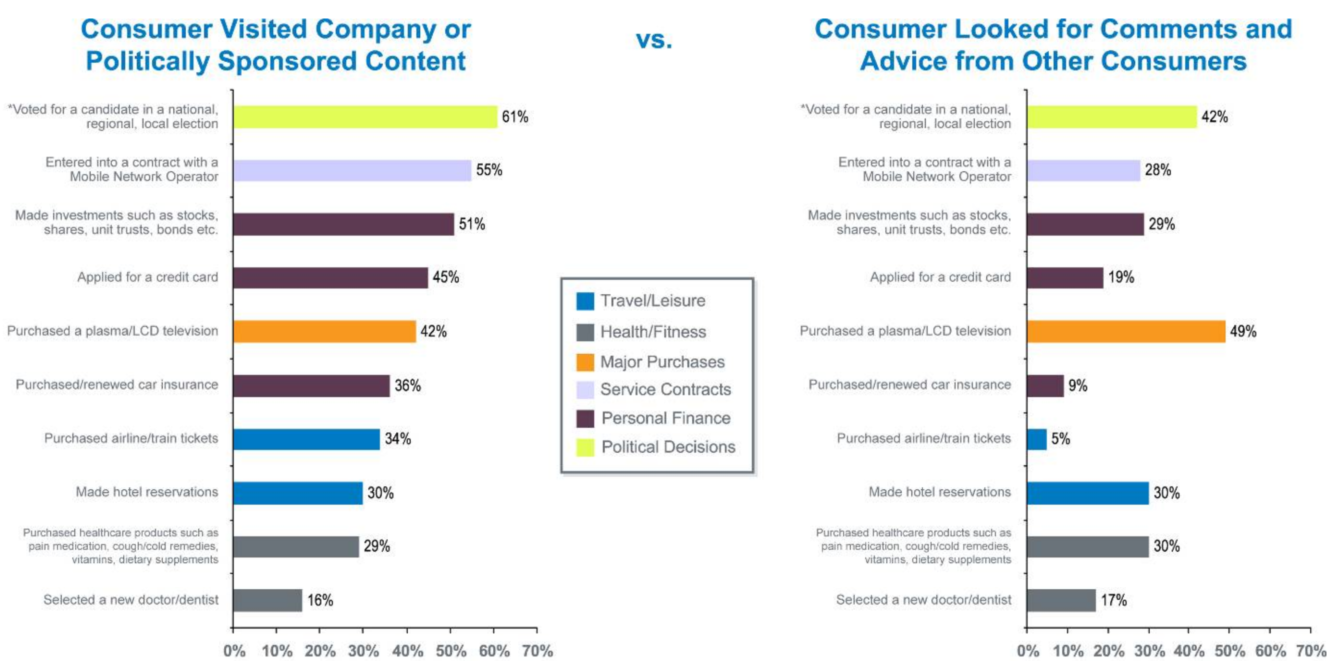


Note: Weighted total across UK, Germany and France.

- **Health and Fitness** decisions are influenced to a lesser degree than other categories. Decisions such as selecting a new doctor or dentist (41%), purchasing private healthcare (39%), buying medicine or supplements (30%), and gym memberships (28%) do not pass the average 50% mark for the Internet's influence on everyday decisions. A possible explanation could be that British, French, and German consumers sign up with a local, state-provided doctor or dentist and accept their advice on medication; they simply have less need to research doctors and medicines online than consumers in other countries, such as the USA.
- **Political Decisions** are subject to some Internet influence but to a lesser degree than any of the five categories of decisions.

How does the influence of the Internet differ depending on the type of decision?

After classifying the types of decisions that are influenced by the Internet, the researchers looked more specifically at how consumers used the Internet to support their decision-making. The most interesting finding focused on the distinction consumers make between looking at controlled content on a company- or government-sponsored Web site and seeking online comments and advice from other consumers. The graph below shows a simple comparison for 10 of the key decisions. It is clear that consumers use a different mix of information-seeking based on the type of decision.



Note 1: Weighted total across UK, Germany and France.
Note 2: * Indicates politically-oriented and not company web-site.

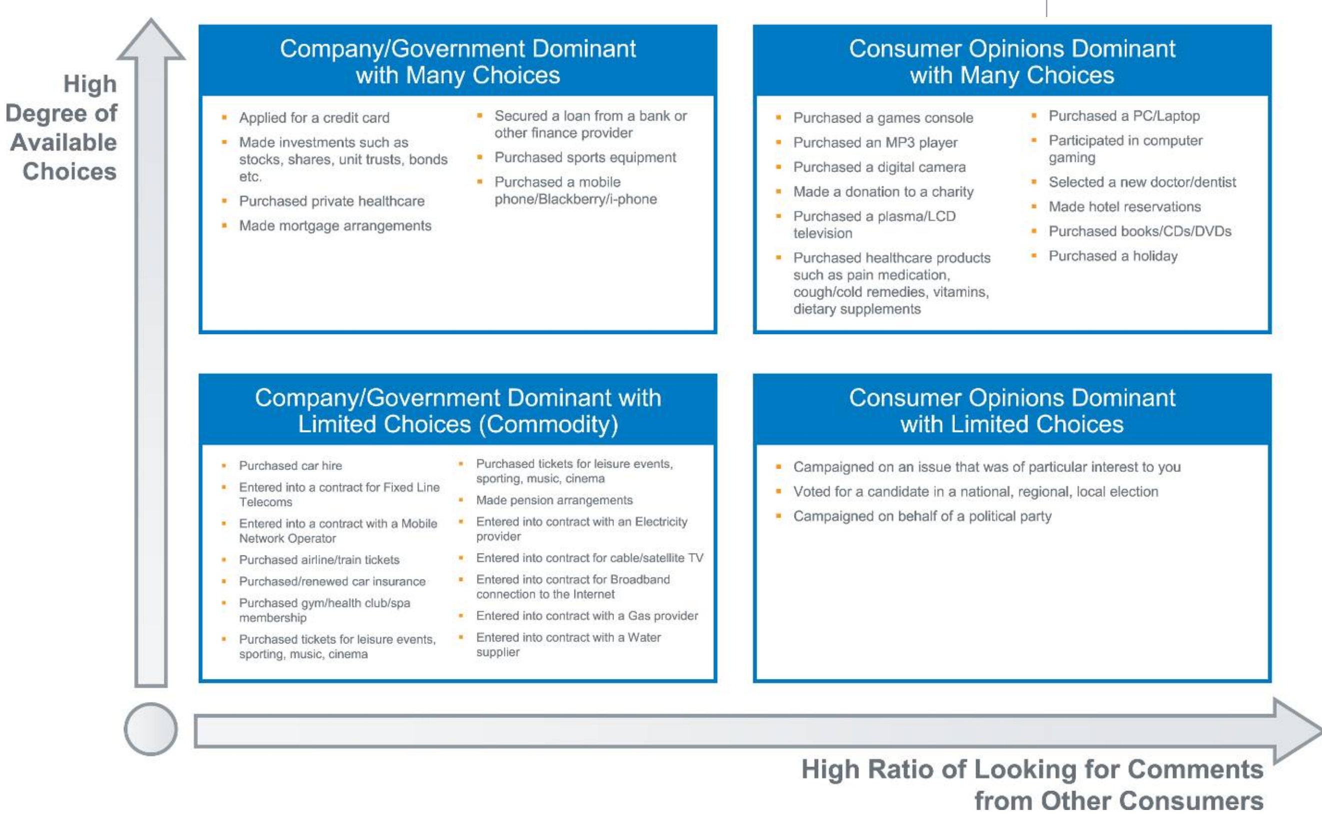
How does the type of decision and range of choices available to a consumer affect how they use the Internet?

As an additional way to interpret the mix of information seeking behaviour for these 35 types of life decisions, the researchers examined two dimensions:

- **Dominance by Company/Government content or Consumer Opinions**: The first dimension is the ratio of seeking out controlled content to consumer opinions in making a specific decision.
- **Many Choices or Limited Choices**: The second dimension is the number of available choices for that specific decision.

The researchers used these two dimensions to establish four quadrants:

- **Company/Government Dominant with Many Choices** — These types of decisions are dominated by controlled content and there are many available options. These tend to be financial-type decisions.
- **Consumer Opinions Dominant with Many Choices** — These decisions are dominated by consumer opinions. They tend to be oriented around technology purchases with rapid change and proliferation of options. They can also be decisions about content or experiences, such as a holiday destination, for which opinions of other consumers can help narrow the choices.
- **Company/Government Dominant with Limited Choices** — These types of decisions are dominated by controlled content and are generally commoditised decisions for which there are limited choices, like utilities or airline tickets.
- **Consumer Opinions Dominant with Limited Choices** — These decisions are dominated by consumer opinions, but there are limited choices. Political decisions tend to be in this group.



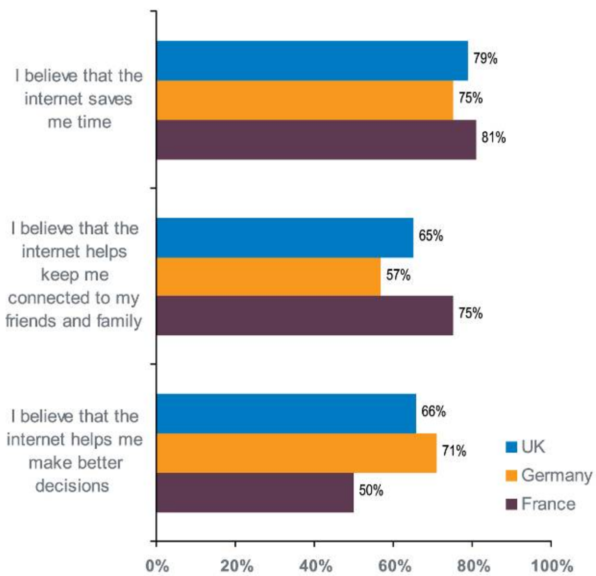
Insight No. 4: Consumers see the clear benefits of the Internet to their lives, but they still have strong concerns that need to be addressed.

It is clear from the research that the Internet is the dominant communications medium in the lives of European consumers in the U.K., Germany, and France. This could be due to the key benefits that consumers see from using the Internet — it saves time, helps them stay connected to friends and family members, and helps them make better decisions.

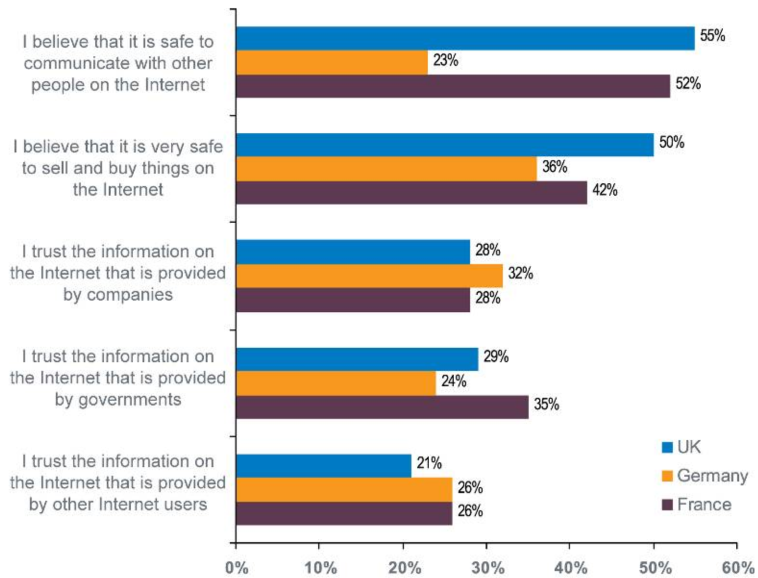
At the same time, the adoption of some digital behaviours and a deeper engagement with the medium may be held back by concerns about Internet safety and doubts about the trustworthiness of online information.

To overcome these concerns, any organisation's engagement with consumers in the digital world needs to be based on an open and honest representation of interests and positions. To do otherwise will likely backfire.

Benefits of the Internet



Trust and Safety on the Internet



Insight No. 5: Although there are many similarities between the three major European countries studied, there are some interesting and important patterns:

Germany

Germany is the leading research and Web 2.0 publishing nation of Western Europe's big three Web markets surveyed in this report. It's evident that German Web users are keen to participate online but do research to be sure of their facts. Other notable findings include:

- German consumers are the most likely to view a company Web site when making purchases.
- More than four in five Germans read Wikipedia — more than 50% above the average rate of 48% in the U.K. Germans are twice as likely to contribute to Wikipedia — 11% compared to 5% in the U.K.
- Sixty-three percent of Germans read professional articles/publications, compared to 44% of Britons.

This research ethic applies to price-comparison sites as well as to company Web sites, both of which are used more by Germans than by their French and British counterparts. In making a decision about a mobile phone contract, for example, nearly four in five Germans will look at a company site — roughly triple the rate in France and nearly double the U.K. rate. Germans also are slightly more likely to look at product-comparison sites.

This firm research basis seems to give Germans the confidence to buy or sell products and publish online.

- Four in five Germans pay bills online (nearly double the French rate — despite similar Web banking adoption rates).
- 61% sell items using an online auction or online classified adverts (nearly double the U.K. rate).
- Nearly half rate products/service online (nearly double the U.K. rate).
- 86% use eBay each month, compared with 47% in France and 64% in the U.K.

France

In France, 55% of the population uses the Internet, compared with two-thirds of Germans or Britons. However, those French consumers who do spend time online devote more of their overall media consumption to this medium than do U.K. consumers (38% vs. 30%) and are influenced most by the Internet.

- More than four in five find listings and directions to shops online, compared with half of Britons (perhaps a result of many years spent using Minitel —a local terminal-based directory service — to locate local shops and services).
- 34% read blogs compared with 23% of Britons.
- 66% of users own a webcam, compared with 42% in U.K. and 40% Germany.

- Three-fourths use instant messaging, compared with just under half of Britons and only four in 10 Germans.

Implications for Marketers and Communications Specialists:

Marketers and communications specialists can use the insights in this study of more than 30 life decisions to help plan the emphasis of a digital strategy for influencing consumer choices about their product or service.

Maximizing their return on investment requires that they create the right balance among reach, effectiveness, and cost.

- Focus spending on the greatest areas of influence while also factoring in reach and associated cost. Audit the space around your brand, products, and services; map networks of influence; and understand the groups and individuals concerned.
- Establish the best mix of Web 1.0 and Web 2.0 behaviours relative to their business and formulate an integrated campaign to maximise their reach.
- Recognise that the role of the companies engaging in Web 2.0 behaviors is to facilitate forums for content generation for their brands, monitor those conversations, and engage in the conversation. It is not to push messages at mass audiences.

Beyond online advertising, as marketers and communications specialists move to reprioritize focus and spending toward the Internet, there are some things that are important to remember.

Digital Presence

Almost all consumers use the Internet to find information to better inform their decisions. It is important for a company to actively manage its digital presence through:

- **Search and online visibility.** Search has become a ubiquitous part of almost any experience using the Internet as the gateway to many Web 1.0 and Web 2.0 behaviours. This means that in today's media environment, appearing near the top of search results is critical to having visibility — and visitors — online. Additionally, as consumers continue to create content and increase their share of voice via blogs and social networking, competition to appear on the first page of search results intensifies. Search engine optimisation (SEO) has never been more important in terms of driving traffic and ensuring that marketing messages are available in the search consideration set.
- **A strong Web site.** Providing an engaging, audience-centric and easy-to-use site — often the first and only time a consumer will interact with a brand or organisation — is critical to affirming a trusting relationship online.
- **Wikipedia.** Many consumers are using Wikipedia as a key source of centralised information about a company or brand. Companies need to actively engage in shaping their Wikipedia entries and not be defined by others.
- **Join the online conversation.** Actively engage with consumers and influencers, both the supporters and detractors, and maintain open dialogue.

- **Consumer-generated media (blogging/social networks/product ratings).** Online consumers are carrying on conversations about companies and brands. These conversations should be monitored and open and honest outreach campaigns launched to represent the companies' interests. The role of companies is to facilitate forums for content generation when it is positive for their brand and react when it is negative.
- **Mobility.** Internet content is increasingly being consumed on smart mobile devices, so a company needs to make sure that its content is mobile-ready:
  - **Immediately.** Ensure that Web sites, content, and customer communication channels are mobile-compatible.
  - **Midterm.** Develop a mobile strategy to take account of hardware and network improvements that are beginning to deliver more immersive user experiences, including mobile social networking and geo-locational services.

Consumers clearly embrace the Internet because of its benefits, but they still have strong concerns about trust and security that need to be addressed.

- Any engagement with consumers in the digital world needs to be based on an open and honest representation of interests and positions. To do otherwise will likely backfire.
- Consumer conversations, opinions, and ratings are indelibly documented online. Resolving issues online quickly and satisfactorily is imperative to both immediate and long-term reputation.

What Is Next for the Digital Influence Index Study?

This study is intended to provide an annual assessment of the changing influence of the Internet in the lives of consumers across multiple countries. The next version is planned to include:

- **Expanded geographic scope.** Major markets in Asia, Europe, and North America will provide a global perspective.
- **Expanded coverage of life decisions:** Although more than 30 life decisions were studied in this first round of the research, many additional important areas were left unexplored. The next round of the research will expand into new areas.
- **Identify the way WOM is used online versus offline.** The Internet amplifies the potential impact of word-of-mouth as consumers can now quickly find, review, and engage in conversations with a much wider set of other consumers than by relying on traditional word–of-mouth, which is constrained by geography or the limitations of interpersonal communication. The next round of research will explore the behavioural impact of digital WOM in more detail.

Methodology

The Digital Influence Index assesses the relative role and the influence of different media in the lives of consumers. This project was designed and led by FH Digital Research Group, a team within the Fleishman-Hillard Research network focused on providing research that supports the digital transformation of communications. Analysis and insight development was conducted in partnership with Harris Interactive.

The fieldwork for this study was also conducted by Harris Interactive, London through a comprehensive, 25-minute online survey among a representative sample of 4,921 Internet users in the U.K., France, and Germany. (U.K. = 1,933 respondents, France = 2,013 respondents, Germany = 975 respondents). This work took place between December 2007 and January 2008. Respondents to the survey were recruited from the various panels managed by Harris Interactive across the markets surveyed.

Harris Interactive weighted the data using its proven bias-correction method, known as Propensity Scoring, to correct for self-selection biases known to exist among respondents who have chosen to join an Internet panel and have chosen to take part in an online survey. The data was weighted to online population targets, including those based on age, gender, education, region, Internet usage. Further weighting was applied to the analysis of the combined results to reflect the online population sizes in each country.

The Digital Influence Index was constructed by factoring in both consumption of a medium and the influence that consumers attach to that consumption. Respondents were allowed to give various media a score out of 100 for the amount of time they spend on them and then a score out of 100 for how influential this time is. Consumption and influence were each scored out of 100 to produce a percentage score for each and a total score out of 200. This latter score is halved to produce a combined percentage score that sums up the influence of the medium.

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Brian joined Fleishman-Hillard in 2007 and has more than 12 years of experience in research and consulting, covering online business models, technology, branding, and advertising.

He spent eight years at AOL, where he led a corporate research team. His responsibilities included brand positioning, messaging, advertising development, brand measurement, and customer satisfaction programmes. He was also one of the first client-side practitioners to embrace survey-based methods for measuring word-of-mouth.

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