

Understanding the role of the Internet in the lives of consumers

Digital Influence Index Study
June 2010

Executive Summary

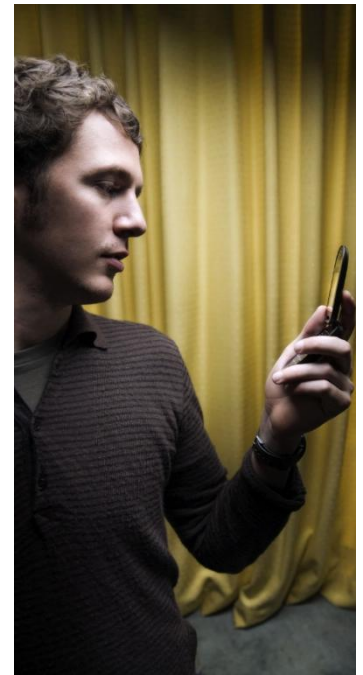
The Internet has clearly transformed the lives of millions while disrupting and displacing the business models of traditional media channels around the globe. But what impact does it really have on how people live? And how important a role does it play in their decisions? Does that role vary from country to country, or are users' experiences universal? Will concerns about such issues as privacy and security dampen consumers' digital enthusiasm, or will new media continue to play an expanding role in their lives?

These are critical questions. This study offers the answers.

The Digital Influence Index Study sheds new light on fundamental changes in how consumers communicate and interact with one another and the world around them — on how they form new communities and adapt new rules of engagement. From there, it explores the effect this transformation is having on traditional modes of behavior and social norms and structures.

The Digital Influence Index Study measures several key aspects of consumers' use of the Internet, from media consumption patterns, to the degree of adoption of various digital behaviors, to involvement with online social networking. But it goes beyond all that to assess the Internet's influence on specific decisions — from purchasing to politics, healthcare to finance.

More important, the study uses these findings to provide marketers with unique and practical insights into the Internet's influence on consumer behavior and decisions in key markets around the world, and to offer them tools companies can use to determine the best ways to influence online discussions and interactions.



“The Internet is by far the most important medium in the lives of consumers in all countries studied ... and even more important in China.”

Now in its second year, the study has expanded from the France, Germany and the United Kingdom to include Canada, China, Japan and the United States. Together, these seven countries represent 48 percent of the global online population. The online survey took place between December 2009 and January 2010. The data was quota sampled and weighted to be representative of the online populations of each country.

For purposes of the study, media “influence” is defined as a combination of the time consumers spend on each medium and the relative importance they attach to it 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.

Some Key Facts about the UK:

- In the U.K., 36 percent of online consumers do not read magazines and 33 percent do not read a printed newspaper.
- The internet is absolutely or very important when making decisions to almost 30% of online consumers, more than twice as much as TV (13%).
- 53% of internet users in the U.K. think that others share too much personal information.
- Only 9% of Internet users in the U.K. are concerned about the impact their social media activities could have on their career, compared to over half in China.
- Only about half of Internet users in the U.K are comfortable that a company would monitor a person’s Twitter account and respond to issues expressed by customers. This is the lowest level of comfort of all studied countries.