

## EUROPEAN MARKETING & ADVERTISING



# CONSUMER-CREATED CONTENT

Assessing Influence of Content-  
Contributing Online Consumers

**European Marketing  
& Advertising**

**Volume 3, 2005**

**Research Topics**

- Branding
- Emerging Ad Platforms

**Business Benefits**

- Building Brand Equity
- Customer Retention
- Customer Segmentation/  
Targeting

# CONSUMER-CREATED CONTENT

## Assessing Influence of Content- Contributing Online Consumers

The Internet enables users among the growing online population to post personal content to an easily accessible public forum. When published thoughts or opinions relate to experiences as a consumer, the power of marketers' well-crafted brand communication can be undermined. With increasing cases of consumers' brand dissatisfaction hitting the Web, marketers must confront this form of consumer empowerment.

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## Research Highlights

### **European Online Advertising Forecast, 2005 to 2010: Responding to the Rise of Digitally Empowered Consumers**

The balance of power between marketer and audience is shifting as consumer adoption of enabling digital technologies grows. While marketers buy increasing amounts of online media to reach newly empowered consumers—spending will represent six percent of total advertising expenditure by 2010—the investment will not help build brands without a concomitant shift in communication strategy from intrusive monologue to inclusive dialogue. (European Marketing & Advertising, November 8, 2005)

### **PR and Blogs: Monitor and Prepare for Inter-Consumer Communication**

Companies are becoming increasingly capable of monitoring inter-consumer communication (ICC). (Marketing & Branding, October 27, 2005)

### **Dynamic Attitude Analysis: Mindset of the Online Poster**

Marketers are increasingly interested in using the Internet to engage brand loyalists. (Online Advertising, July 8, 2005)

### **Dynamic Attitude Analysis: Making Opinions Measurable and Actionable**

A new category of software tools has emerged that use search engine technology to organize and categorize consumer-posted thoughts and opinions. (Online Advertising, October 28, 2004)

## Executive Summary

The Internet enables users among the growing online population to post personal content to an easily accessible public forum. When published thoughts or opinions relate to experiences as a consumer, the power of marketers' well-crafted brand communication can be undermined. With increasing cases of consumers' brand dissatisfaction hitting the Web, marketers must confront this form of consumer empowerment.

### Key Questions

- To what extent are European consumers contributing content online?
- What characterizes content-contributing online consumers?
- Why should marketers pay attention to growth of consumer-created content?
- What can marketers do to control and harness consumer-created content?

### Key Findings

#### **Landscape: Unprompted Online Content Contribution Predominantly Comes from Young Male Early Adopters**

An array of contribution options are available to online Europeans, but only 24 percent said they posted unsolicited content online during the past 12 months. Of consumers participating in discussion forums, contributing to message boards, or maintaining personal Weblogs or sites, 63 percent are male, 59 percent are ages 15 to 34, 67 percent have broadband, and 72 percent have more than two years' online tenure.

#### **Outlook: Rising Influence of Consumers' Brand-Related Content Will Impact Marketing Communication**

As the quantity of online contribution grows and exposure to it widens through increasing search activity, the prominence of consumer-created content will magnify. With the potential for peer-to-peer brand-related communications thus augmenting, marketers must address consumers' online postings. Online contributors tend to have more influence and more willingness to provide opinions about products and services than do average consumers.

#### **Mandate: Marketers Should Identify and Connect with Influential Online Contributors**

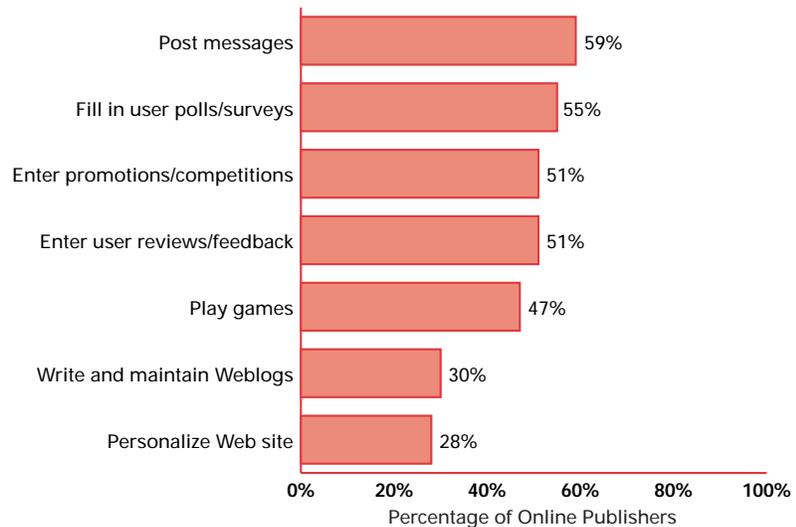
Marketers must monitor and analyze consumer-created content (e.g., through adoption of buzz-monitoring tools) to gain insight into the minds of their target audiences. By understanding the type and scale of online consumers' brand conversations, marketers can identify key influencers and map out their networks. Marketers should then engage these influencers, and encourage them to communicate in brand-hosted customer community forums to ensure maintenance of positive brand reputations.

# Landscape

## Unprompted Online Content Contribution Predominantly Comes from Young Male Early Adopters

### Consumers Presented with Array of Participation Opportunities Online

**Fig. 1** Level of Consumers' Participation Offered by European Online Publishers



Question: In which of the following ways do you enable visitors to interact with your site? (Select all that apply.)  
 Source: IAB Europe/JupiterResearch Executive Survey (9/05), n = 53 (publishers, Western Europe only)  
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The Internet offers users not only the ability to access and navigate through an expansive breadth and depth of secondary content, but also a channel to input their own primary content due to its interactive and participatory nature. A plethora of two-way contribution mechanisms exists online, empowering consumers' expression.

Most Web site owners prompt their visitors to participate. In a recent JupiterResearch survey of online publishers, all enabled and encouraged some form of contribution. Of these publishers, 59 percent said they offered consumers the ability to post messages in chat rooms, to message boards, or through discussion forums. Also, 55 percent asked users to fill in polls or surveys, and 51 percent asked users for reviews or feedback. Publishers often encourage contribution with the promise of winning prizes or other value exchanges. Of media owners surveyed, 51 percent enabled consumers to enter promotions or competitions.

Alongside this requested contribution, online consumers can publish their own content in unrestricted public forums through a variety of platforms. Without the need for technical expertise, consumers can create personal sites using simple tools (e.g., squarespace.com), contribute to and edit open-source multi-user "wikis" (e.g., wikispaces.com), as well as

update and maintain regular diary or Weblog entries. A growing array of Weblog tools for online consumers also exists (e.g., blogger.com, bloglines.com, livejournal.com, myspace.com).

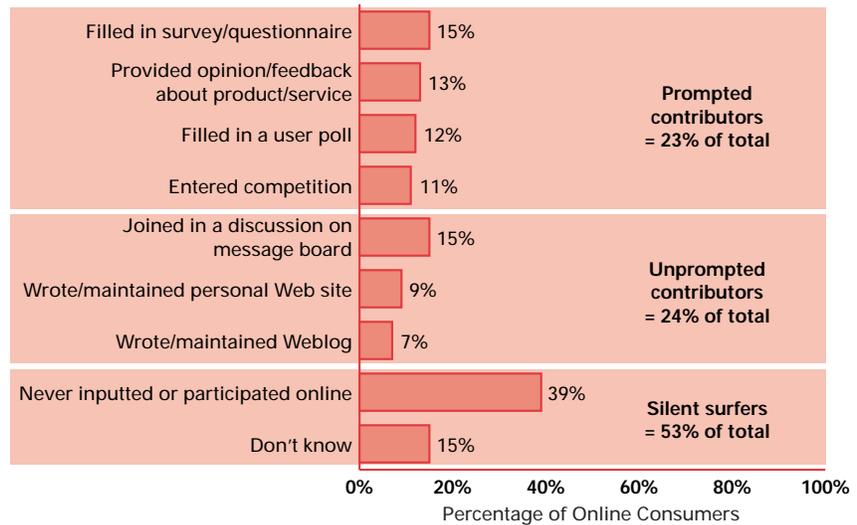
For media owners, offering participation enables comparatively deeper audience understanding and closer audience relationships. It also increases audiences' engagement, sense of community, and ultimately loyalty. For marketers, the ability to gain consumers' feedback, attitudes, and opinions through online media offers opportunities to gain relatively deeper marketplace insight and intelligence.

### Despite Participatory Nature of Web, More than One-half of Europeans Online Are Silent Surfers

**Fig. 2** Level of Content Contribution Among European Internet Users

Question: Thinking about ways in which you have inputted information on the Web, which of the following activities have you carried out online during the past 12 months?

Source: JupiterResearch Consumer Survey (9/05), n = 4,288 (UK, France, Germany, Sweden, Italy, Spain only)  
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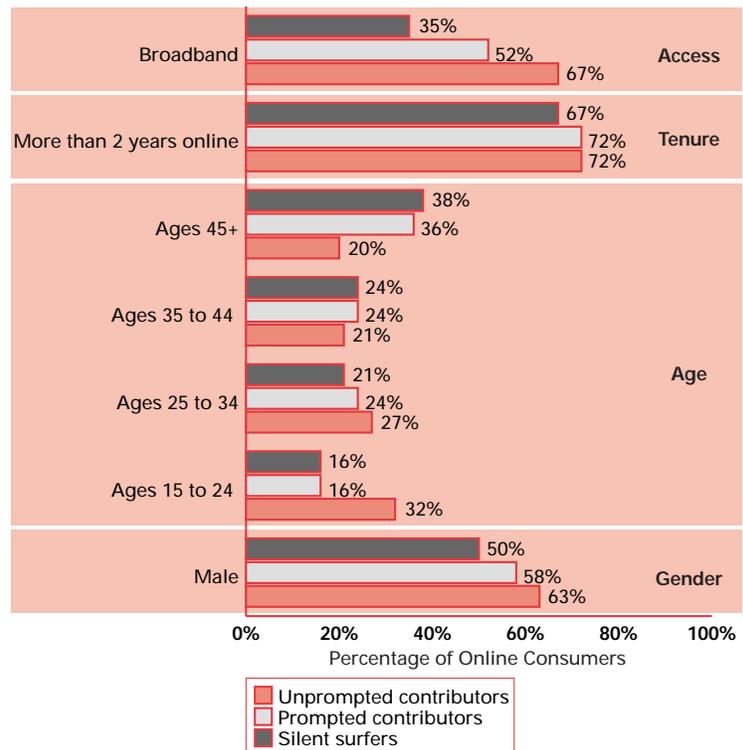
Many opportunities exist on the Web for consumers' content contribution, but more than one-half of European Internet users are passive, silent surfers who do not participate. When asked how they had contributed online information in a recent consumer survey, 39 percent of European users said they had never inputted or participated online, while 15 percent did not know how.

Self-solicited contribution remains niche, with less than one-quarter (24 percent) of online consumers saying they participated in some form of unprompted content creation. Although 15 percent of European online consumers have joined in discussions online, only nine percent have maintained personal Web sites, and seven percent, Weblogs, during the past 12 months. By country, online consumers in Spain (13 percent) and France (12 percent) show the most inclination toward Weblogs, while online consumers in Germany (three percent) show the least inclination. This discrepancy could result from cultural differences regarding the nature of communication and language expression—a trend also reflected in use of online communication applications. Although 41 percent of online consumers in France and 40 percent in Spain use instant messaging (IM) at least monthly, only 15 percent in Germany do so.

Even when prompted, online contribution remains relatively low. Among European consumers, only 15 percent filled in surveys or questionnaires online, 13 percent provided feedback about products or services, 12 percent filled in user polls, and 11 percent entered competitions for chances to win prizes. Due in part to having an experienced and sophisticated audience, Sweden has the highest levels of prompted contribution by country: 37 percent filled in surveys.

## Unprompted Content Contributors Are Mainly Young, Male, and Experienced, with Broadband

Fig. 3 Profile of European Online Content Contributors



Question: Thinking about ways in which you have inputted information on the Web, which of the following activities have you carried out online during the past 12 months?

Source: JupiterResearch Consumer Survey (9/05), n = 4,288 (UK, France, Germany, Sweden, Italy, Spain only)  
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The vocal element of the European online audience tends to be young and male, with high online tenure and bandwidth access. Of unprompted contributors inputting into Weblogs, personal Web sites, and discussion boards, 59 percent are ages 15 to 34, and 63 percent are men—the classic profile of early adopters. The vast majority of them (72 percent) have been online for more than two years, with 67 percent having broadband. Of the silent majority, 62 percent are ages 35 and more, males and females are evenly split (50 percent each), and only 35 percent have broadband.

Marketers must therefore bear in mind that information gleaned through mechanisms such as online surveys will likely skew toward the comparatively more vocal online segment, not necessarily representing the target audience as a whole. Spending time to input into and output from the Web, online contributors are heavier Internet users than are average online consumers—not surprising. Of unprompted contributors, 24 percent spent more than 16 hours per week on the Internet, compared with only 11 percent of prompted contributors and five percent of silent surfers.

Although relatively younger, less mature users are likely to be less inhibited in their public announcements due to their exuberant nature, JupiterResearch believes contribution will spread further throughout the online population with the rise of broadband. Growing broadband penetration throughout Europe (from 54 percent of Internet households in 2005 to 74 percent in 2010), coupled with increasing experience and confidence among consumers online, will help boost levels of contribution to some extent.

### Communicative Online Contributors Have High Use of Web Content and Commerce

Fig. 4 Levels of Content and Commerce Experience Among Contributors

	Unprompted Contributors	Prompted Contributors	Silent Surfers	
Content-Related Activity	Listened to Web-based audio regularly	35%	20%	7%
	Watched Web-based video regularly	32%	14%	5%
	Played online games	25%	14%	7%
Commerce-Related Activity	Used search engine regularly	77%	78%	51%
	Did not purchase online	21%	27%	51%
	Researched products and services regularly	49%	48%	23%
	Paid for music online	11%	7%	1%

Question: Thinking about your use of the Internet during the past year, which of the following activities did you conduct online monthly or more frequently?  
 Source: JupiterResearch Consumer Survey (9/05), n = 4,288 (UK, France, Germany, Sweden, Italy, Spain only)  
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As heavy-using, Web-savvy online consumers, content contributors tend to have the most experience in both commercially driven channels and consumer-driven channels on the Internet. Unprompted contributors are highly likely to have purchased products and services online: Only 21 percent said they hadn't purchased online, compared with 27 percent of prompted contributors and 51 percent of noncontributors. Unprompted contributors are also more likely to have purchased content, with 11 percent paying for music online, compared with only seven percent of prompted contributors and one percent of silent surfers. Also, almost one-half (49 percent) of unprompted contributors regularly research products and services online.

As well as offering up the most content online, unprompted contributors consume the most online content. They are five times more likely to have listened to Web-based audio, compared with silent surfers (35 percent vs. seven percent, respectively), and more than six times more likely to have watched Web-based video (32 percent vs. five percent, respectively). As a result, they have an above-average tendency to regularly use search engines at 77 percent, compared with the European average of 63 percent.

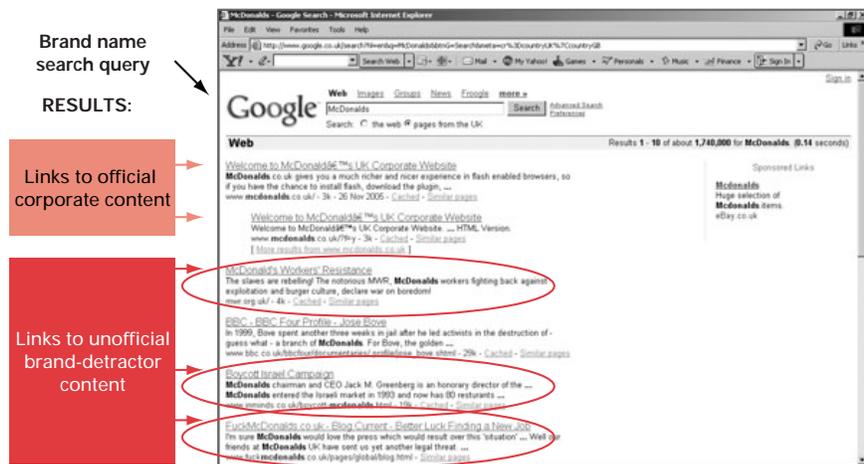
Users inputting the most online are also getting the most from the Web: 52 percent said the Internet made them feel better informed, compared with 40 percent of prompted contributors and 23 percent of noncontributors. Marketers must bear in mind that online contributors might often refer to their commercial and content-related experiences in their postings, and their opinions might not always be favorable.

# Outlook

## Rising Influence of Consumers' Brand-Related Content Will Impact Marketing Communication

### Growth in Search and Contribution Activity Will Extend Reach, Power of Consumers' Content

Fig. 5 Google.co.uk Results Page for Search Query Using "McDonalds"



Source: Google screen shot (12/1/05)  
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Consumer-created content will rise in prominence during forthcoming years, as Internet access continues growth throughout Europe and off-line and online media consumption merges. With the adoption of content-creation tools democratizing the publishing of information and parallel growth of search engine use democratizing access to this information, consumers will increasingly be exposed to informal, peer-produced content, alongside formal, professionally created content. This exposure could significantly impact brand communications if consumers' content refers to product or service experiences that are incongruous and misaligned with official marketing messages. When a company's marketing story differs from the one being told by online consumers, a credibility gap will emerge that could have dire consequences regarding brand perception and favorability.

To illustrate this point, JupiterResearch typed "McDonalds" into google.co.uk. Of the six links provided above the fold, the first and second were for the official corporate Web site. Directly underneath, however, the third, fifth, and sixth links were from McDonald's detractors with highly negative opinions of the brand. This detraction also affects comparatively smaller brands. UK-based Market Sentinel conducted similar research on

the country's top 50 grocery brands, including well-known products such as Kingsmill bread, Walkers crisps, and Mars chocolate bars. It found 20 of these brands had some form of negative consumer comment within the top 10 results.

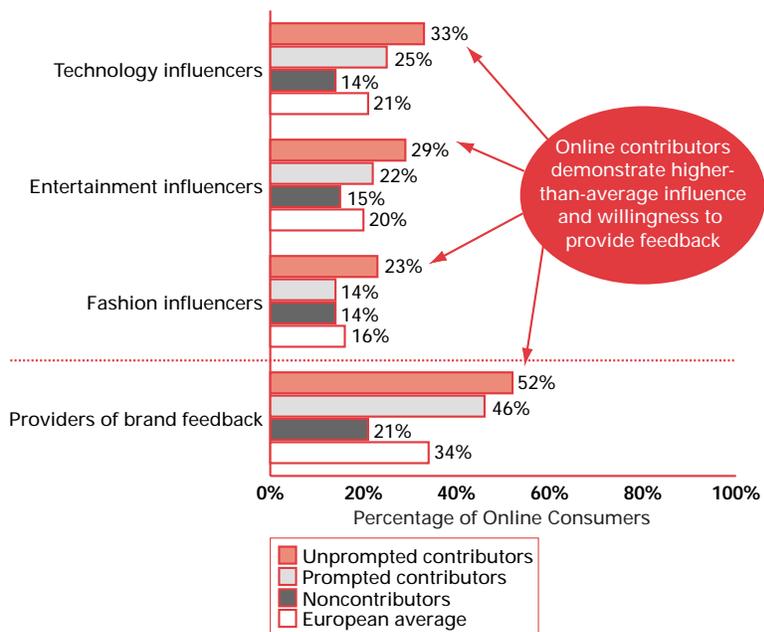
Although the number of contributors is currently small, their impact and influence can have wide reach. As the quantity of postings grows, brand owners must pay increasingly close attention to this online contribution.

### Consumers' Online Content Will Increasingly Influence Purchase and Brand Decisions

**Fig. 6 Levels of Perceived Influence and Willingness to Provide Feedback Among European Online Contributors**

Question: Which of the following parts of the statement do you agree with: I am the first person people come to for recommendations about consumer electronics, technology/entertainment/fashion? Do you agree with the following statement: I am willing to offer my opinion/feedback about a company, product, or service online?

Source: JupiterResearch Consumer Survey (9/05), n = 4,288 (UK, France, Germany, Sweden, Italy, Spain only)  
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As the growing reach of consumer-created content widens its impact, the outspoken and opinionated nature of its authors will increase its influence. Perhaps unsurprising, given their willingness to offer up their thoughts online, unprompted contributors perceive themselves to be comparatively more knowledgeable and influential. When asked if they considered themselves to be the first person others come to for recommendations about consumer electronics and technology, 33 percent of unprompted contributors agreed, compared with 21 percent of average online Europeans and 14 percent of silent surfers. For recommendations about entertainment, 29 percent agreed they were primary sources, compared with a European average of 20 percent. Moreover, for recommendations about fashion, 23 percent agreed they were primary sources, versus a European average of 16 percent.

Furthermore, online contributors have a high willingness to provide feedback about their consumption online—requested or otherwise. Fifty-two percent of unprompted contributors and 46 percent of prompted contributors agreed they were willing to offer their opinions about companies, products, and services online, compared with 21 percent of silent surfers and the European average of 34 percent.

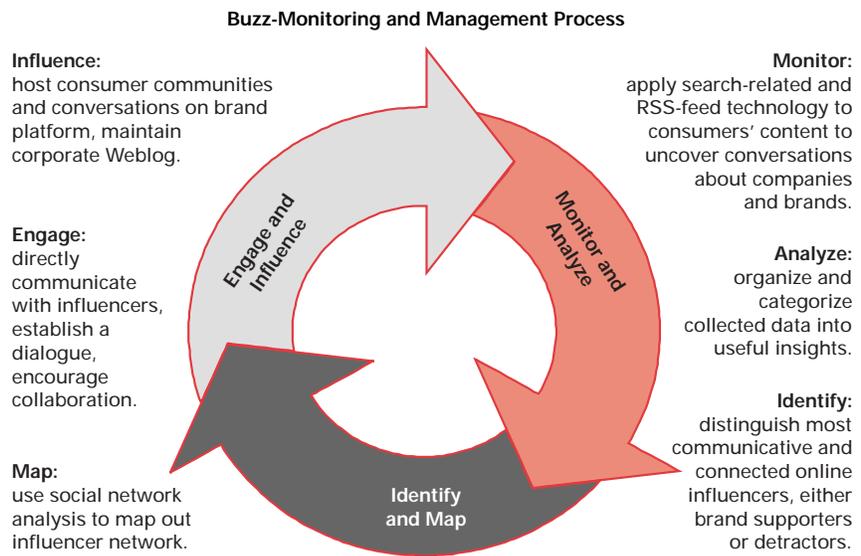
Marketers must be aware that strong brand opinions and feedback posted by these influential contributors will quickly spread among interconnected consumers due to the ease of retrieval of consumers' content and the highly linked nature of the Weblog network, or "blogosphere." Although this reach can influence brand perceptions among a niche audience, marketers should be comparatively more concerned about the connection between the "blogosphere" and the press. Once posted, consumers' comments could be picked up by the mainstream media as a good story. At this stage, a small-scale disgruntlement could be exposed to a mass audience, resulting in a disproportionately large-scale public relations problem—as experienced by Kryptonite locks, Land Rover, and Dell.

# Mandate

## Marketers Should Identify and Connect with Influential Online Contributors

### Marketers Should Adopt Some Type of Buzz-Monitoring Practice

Fig. 7 Cyclical Process for Monitoring and Managing Online Buzz



Source: JupiterResearch (12/05)  
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Online consumer-created content presents marketers with not only the potential threat of brand-damaging postings, but also the opportunity to gain insight into the minds of their target audiences to help inform and improve future marketing strategies. Marketers should look to adopt sophisticated tools and establish ongoing cyclical practices to monitor consumers' content, analyze online conversations, identify key influencers, and influence their conversations.

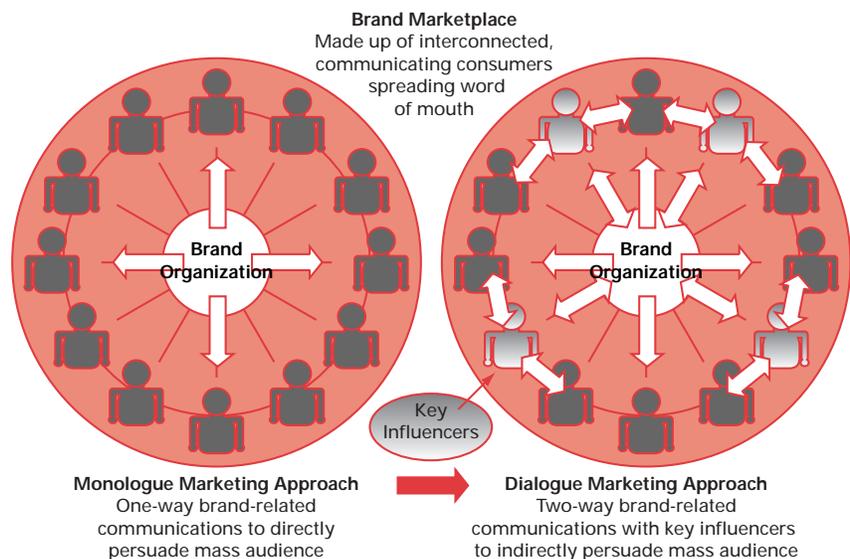
Through the application of search-related buzz-monitoring technology, coupled with human analysis, marketers can determine the type, variety, and scale of online brand conversations. Simple assessment of marketplace noise can be established through providers such as Intelliseek (BlogPulse), Technorati, or IceRocket. Relatively more sophisticated buzz-monitoring tools (e.g., BuzzMetrics, Cymfony) are also emerging to closely monitor, organize, and categorize consumers' discussions. These tools deliver timely intelligence about attitudes as well as provide early warning of marketplace issues and trends. (See *Dynamic Attitude Analysis: Making Opinions Measurable and Actionable*, Online Advertising, October 28, 2004.) Once understood, online buzz should then be assessed in the context of the competitive environment. Market Sentinel offers an online Net

Promoters Index that creates a benchmark of a brand's reputation and consumers' brand perception/loyalty, compared with competitors' products and brands.

To explore the nature of online discussions, marketers should then identify the source of consumers' brand-related content, profile key influencers, as well as map out the network and links through which conversations spread. Onalytica offers marketers a stakeholder mapping service, devised through social network analysis. This service not only helps develop an understanding of the key players with interest in an issue and their networks, but also shows at which point messages will most effectively enter the stakeholders' universe. By eavesdropping on marketplace buzz and capturing brand-related inter-consumer conversations, online marketers can augment their market intelligence by measuring brands' affinity and favorability, discovering new connections to and connotations of brands, as well as identifying supporters, detractors, and key issues surrounding brands.

### Encourage Content Contribution from Marketplace Influencers to Spread Positive Brand Perceptions

Fig. 8 Comparison of Monologue Marketing Approach and Dialogue Marketing Approach



Source: JupiterResearch (12/05)  
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Profiling and pinpointing marketplace influencers enables marketers to move beyond a mass-audience monologue approach toward a comparatively more engaging and potentially powerful targeted-audience dialogue approach. By directly connecting to and establishing positive relationships with key influential online content contributors, marketers can help turn brand enthusiasts into advocates, who can in turn build brands' credibility and support among a relatively wider target audience. Furthermore, by identifying and reaching out to disgruntled brand detractors, marketers can potentially address concerns and mitigate negative sentiment before they influence wide brand perceptions and reputation.

Marketers should use online communication channels (e.g., e-mail, IM, public forums) to communicate directly with key influencers, giving them incentive to collaborate in brand-related discussions. For the launch of the new N90 handset, Nokia developed a Weblog-relations campaign, treating 50 key Webloggers with interest in technology gadgets like members of the press, sending them the product, and encouraging them to write about it.

Rather than let third-party publishers mediate reputation—official or unofficial—as is the case in traditional public relations, marketers can take control of online brand-related conversations by hosting their own product- or service-related discussions through corporate Weblogs and online customer communities. Already popular among technology companies (e.g., Microsoft, Macromedia), this practice is beginning to take off in other sectors such as automotive (e.g., General Motors's [fastlane.gmblogs.com](http://fastlane.gmblogs.com), Ford Motor's [focusfanatics.com](http://focusfanatics.com), Audi's [audiworld.com](http://audiworld.com)) and fashion (e.g., [Inscene](http://Inscene)). Maintaining Weblogs not only demonstrates corporate openness and honesty, which will probably be well received among an increasingly savvy and cynical audience, but also enables search engine optimization. Due to high levels of link equity, this type of informal content works well with search engine algorithms.

By engaging in this type of online public relations, marketers can positively influence brands' reputation, potentially leading to increased sales and loyalty. According to a *Harvard Business Review* article by Frederick Reichheld, this practice positively correlates with companies' stock price valuation.

## Case Study

### Fashion Label Inscene Builds Brand Credibility Among German Youth Through Influencer-Maintained Trend-Watching Weblogs

**Participants:** Inscene is a German-based clothing brand targeted at ages 18 to 25 that competes against companies such as H & M, Gap, and Esprit. Vm-people is a viral- and buzz-marketing agency, specializing in planning, designing, and implementing “contagious communication solutions” online and beyond.

**Goal:** Positioned as a brand for young urban trendsetters, Inscene wanted to develop online marketing communications that made its target audience aware of the latest fashion-forward clothes available. It also wanted to present the brand as a fashion leader, not a follower, and tap into audiences’ needs for relevance, guidance, credibility, and community.

**Execution:** Vm-people created Inscene Embassies, a series of consumer-created content Web sites connected to [www.inscene.de](http://www.inscene.de). Online contributors (called ambassadors) were recruited from the target audience through an application microsite, and selected for their interest in fashion, their reputation as opinion leaders among their peers, and their level of social network connectivity. These influential ambassadors were tasked with operating and maintaining Weblogs from the fashion-influential cities in which they lived (e.g., New York, Tokyo, London, Berlin), offering their views on the latest fashion, music, and entertainment news as well as lifestyle advice and information about their locations.

**Economics:** Apart from establishing the microsite and printing some flyers distributed in stores and bars, the company spent no money promoting the campaign or paying the ambassadors.

**Bottom Line:** For consumers obsessed with being up-to-date, cutting edge, and individual, the Weblog format offered users easy access to the latest news and trends from around the world—on the street, over the air, and on the screen. Leveraging an authentic voice about topics of particular relevance, the Weblogs established credibility of the brand in the minds of this savvy, sophisticated, and cynical audience. By enabling the audience to connect with like-minded individuals, the Weblogs also helped build community. Overall, this consumer-created content helped satisfy the needs of the Inscene target audience, building brand favorability and loyalty among the target demographic.

The campaign increased incremental traffic to the Inscene site, reestablished the brand in the minds of opinion leaders within the youth culture, as well as generated a great deal of press coverage and media buzz beyond normal public relations achievements. Due to the success of the first stage of the online campaign, ambassadors were then set up in Amsterdam, Barcelona, Stockholm, and St. Petersburg.

## Report Methodology

The core of JupiterResearch's products is the perspective and opinion of JupiterResearch's professionals. JupiterResearch's analysts are immersed in the industries they cover through ongoing contact with corporate and technology leaders, daily study of trends and events in the online world, and their collective professional experience. Individual analysts' perspectives are filtered through rigorous collective debate and deliberation, producing research that reflects the combined sensibility of JupiterResearch's entire team.

Analysts' perspectives are enhanced and refined through JupiterResearch-designed market research. JupiterResearch uses many data research tools, including consumer surveys, systematic polling of leading industry executives, comScore Media Metrix measurement data, and a rigorous approach to building market forecasting models. Specialists with JupiterResearch's data research group assist analysts in the technical development of these tools, such as survey design, sample building, data weighting, and data analysis.

This report benefited from a number of specific market research projects, described below.

### JupiterResearch/IAB European Advertisers and Publishers Executive Survey

To gain insight into corporate strategies and macro-level trends, JupiterResearch, in conjunction with the European Internet Advertising Bureau (IAB), conducted a formal survey of leading advertising and publisher executives within market-driving companies. JupiterResearch and the IAB surveyed 53 companies. Executives from these companies were contacted via e-mail requesting their participation in the survey, with the questionnaire attached. This contact was often followed up by a phone interview between the executive and a JupiterResearch analyst. Although the sample is not fully inclusive, JupiterResearch believes the high positions held by respondents and the relatively low number of total companies in this sector make the data directionally indicative and illustrative of important market trends.

### JupiterResearch/Ipsos Consumer Survey

For the UK, France, Germany, Spain, and Italy, all information was collected via Capibus, Ipsos's face-to-face weekly omnibus survey. Capibus uses state-of-the-art computer-assisted personal interviewing technology to interview at least 1,000 adults per week in each of these countries, and the sample is rigorously controlled to be random and representative of the national adult populations. In Sweden, Ipsos uses a preferred local supplier to carry out interviewing by phone omnibus. The supplier works to Ipsos's strict guidelines to ensure the data are representative of the national adult population and of a high quality. All data processing and final quality-control checks are carried out in-house by Ipsos.

Capibus uses a random or random-location sampling design to select survey respondents. Each week, Ipsos's interviewers are given carefully selected areas of up to about 100 addresses in which to work. At each location—a Capibus survey will use up to 250 random locations per week in any one country—quotas for age, sex, occupation, and working status are set; in France, housing type is included. This ensures the survey sample is representative at a national level.

In Sweden, where a phone omnibus is used, respondents are selected at random through random-digit dialing. Quotas are set for age, sex, working status, and occupation to control the sample and ensure it is nationally representative.



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