



Press Release

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Many are unwilling to pay for Internet content

International GfK survey on Internet use in 17 countries

Nuremberg/Frankfurt am Main, December 11, 2009: 13% of users with private Internet access would be prepared to pay for online information: 8% would accept a charge for advertising-free content, and 5% would even pay to access content with advertisements. However, the majority of surfers want to continue to use the Internet free of charge, as they have always done. These are the findings of the international survey "Internet Use", which was conducted by GfK Custom Research and the GfK Association on behalf of the Wall Street Journal Europe in 16 European countries and the USA.

In the survey, Internet users were asked, among other things, how willing they would be to pay for content – in particular on websites focusing on news, entertainment and general knowledge, such as Wikipedia. 80% of respondents in the 17 countries where the survey was conducted want continued free access to online content: a third of all survey participants are of the opinion that Internet content should be free of advertising and free of charge. The majority (46%) want free access to content, but are prepared to put up with advertising. In particular, over 50% of Greeks, Belgians, Swedes and Americans voted for free content paired with advertisements. The proportion of those prepared to accept a charge stands at 13% across all countries: 8% would be willing to pay for advertising-free content, while 5% would pay for content with advertisements. However, some countries view the concept of paying for digital content more positively: 23% of Swedes, almost 20% of Dutch and British people and 17% of Americans would not mind paying to access information on the web.

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Slight differences also become apparent if Internet surfers are analyzed according to their usage preferences: in Sweden, a slightly higher level of acceptance of paid content can be observed among those who like to use the web for blogging and e-finance. Bloggers in the UK also take a more positive view of paid content. In contrast, US surfers who use the Internet for games, music downloads and e-services, such as purchasing tickets for



travel or a concert, are more tolerant of access fees. In Europe as a whole, those who prefer to use the Internet for e-finance, erotic content and e-services tend to be slightly more willing to pay.

Overview of international opinions

Results in %	All content should be free of charge, but I am prepared to accept advertising and other marketing activities	All content should be free of charge, <u>without</u> advertising	I am prepared to pay for content – but <u>without</u> advertising	I am prepared to pay for content, even if there is advertising	None of the statements reflects my opinion
If you think about news, entertainment and information websites such as Wikipedia, and consider the costs incurred by the providers in offering these service, which of the following statements best describes your opinion?					
All countries	46	33	8	5	7
Western Europe	41	42	8	4	5
Belgium	56	27	10	4	4
Germany	37	47	8	1	7
France	39	50	7	1	3
Greece	61	22	6	7	3
UK	44	33	7	11	5
Italy	44	37	13	1	4
The Netherlands	50	28	15	4	3
Portugal	40	43	5	2	10
Sweden	56	14	11	12	7
Spain	34	54	3	3	7
Central/Eastern Europe	35	41	5	2	17
Bulgaria	44	30	6	4	16
Poland	38	51	4	1	6
Romania	22	20	3	1	54
Czech Republic	34	44	7	3	13
Turkey	33	39	5	2	21
Hungary	39	43	5	2	10
Europe as a whole	40	42	7	4	7
USA	57	21	9	8	4

Source: GfK survey "Internet" 2009, GfK / WSJE, autumn 2009, N= 16,800



Traditional Internet services such as email and information searches are most popular

In terms of private Internet use, sending emails ranks top among preferred activities for around half of respondents. Among the Germans, Portuguese, British and Spanish, emailing is popular to an above-average extent.

In second place on the international scale, with similar popularity levels, is calling up information via search engines and reference resources. Reading the news follows closely behind in third place (39%).

Searching for information on the Internet is also highly rated in the USA: 59% state that they predominantly use the world wide web for this purpose, while almost as many correspond with friends or acquaintances. In contrast, people in Central/Eastern Europe prefer to use the Internet to read the latest news (69%), while emailing and searching for information take second and third place (48% and 45% respectively).

Web 2.0 applications like Facebook, Twitter and LinkedIn come fourth in the list of private Internet uses across all countries. One in four surfers uses a network community of this kind. Turkish, British, Greek and American people enjoy online socializing to an above-average extent, while Germans, Bulgarians and Romanians display a high level of caution towards these community portals: only around 7% of respondents in each of these countries include social networking among the most important online activities. In all countries – with the exception of the Netherlands – it is women who tend to use these online services to contact people. Sending emails is also more of a female pursuit (women: 63%, men: 47%). In contrast, reading the news and keeping up with the latest sporting events are activities that are more popular with men during their leisure time.

However, usage behavior does not only depend on gender but also on the intensity of use: heavy users, i.e. people who spend more than 3 hours a day on the web, are more often social networkers, play more games and download more music than light users (people who use the Internet for less than 1 hour a day). Meanwhile, infrequent users show a slight preference for information searches via search engines and reference resources.

Overall, surfers value the Internet and the services it offers. Only a few fear that it may have a negative influence on society: around half of respondents believe that it has positive social effects, a third assess the influence of the Internet as neutral and just 13% fear that it has a negative impact on their country and people.

The survey

In autumn 2009, GfK Custom Research surveyed a total of 16,800 people aged over 15 in 17 countries for the international survey "Internet Use", commissioned by the Wall Street Journal Europe and financially supported by the GfK Association. Respondents were asked whether they had private access to the Internet, how much time they spend online, for what purpose



they prefer to use the world wide web, how willing they would be to pay to access content and what they perceive to be the Internet's influence on society.

The Wall Street Journal Europe (www.wsj.com)

The Wall Street Journal Europe was founded in 1983. It belongs to the leading global financial news group which also includes the Wall Street Journal, the Wall Street Journal Asia and the Wall Street Journal Online, the biggest subscription-based online news website in the world. These publications have a combined paid circulation of 2.7 million. Their readership includes leading economic and political figures all over the world. The Wall Street Journal Europe has a global network of around 1900 journalists, 370 of whom work in Europe, the Middle East and Africa. It is the biggest network of financial and economic journalists worldwide.

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The GfK Group

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The GfK Association

The GfK Association was established in 1934 as a non-profit organization for the promotion of market research. Its membership consists of approximately 600 companies and individuals. The purpose of the Association is to develop innovative research methods in close cooperation with academic institutions, to promote the training and further education of market researchers, to observe the structures and developments in society, the economy and politics that play a key role in private consumption, and to research their effects on consumers.

Survey results are made available to the membership. The GfK Association is a shareholder in GfK SE. Further information: www.gfk-verein.com.

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