



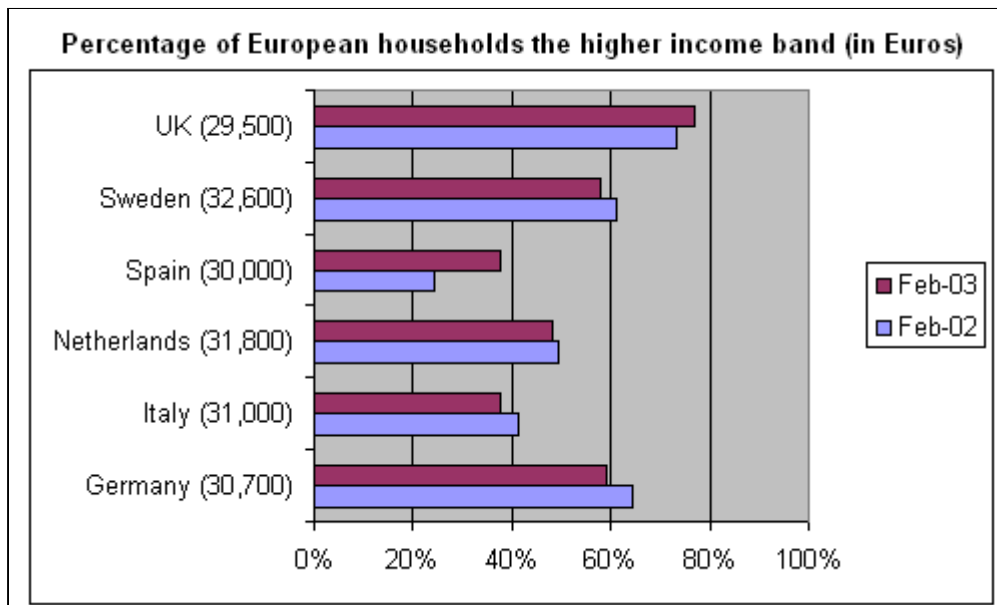
Nielsen//NetRatings netUPDATE

Monthly international data was released on April 10, 2003

More than 77% of Britons on the web earn €30,000 or more per household, whilst in Germany, 59% of responding online households earn more than €30,700.

Nielsen//NetRatings compared income in the households of six of the markets we measure in Europe. Each market we survey uses separate income bands, so we took the nearest to €30,000 household income. The markets where the most households come above this line are also the largest, or like Sweden have the highest Internet penetration. This underlines the fact that the web has had the greatest impact in Europe's largest and wealthiest economies so far.

Across most European markets, though, the proportion of higher-income surfers has dropped slightly between 2002 and 2003, implying a broadening of the Internet's user base. The exceptions are the rapidly growing Spanish market, and the UK.



Source: Nielsen//NetRatings, February 2003 at home data. The figure after each country is the household income above which the household is qualified.

*excludes non-respondents to the income question. France and Switzerland excluded.

The research also examined which sites are most likely to attract an audience from higher income bands. Financial news and banking sites were especially successful with this audience, particularly the UK and Germany. Online directories and information sites were also often popular, as were some Government departments. In Italy and Spain, the countries with the lowest proportions of declared high-income surfers, few sites drew more than half their audience from this demographic, and the sites that scored highly were often non-specialist ones like portals or newspapers.

"The income profiles of Italy and Spain give us some clues as to why financial and e-commerce sites have proved a 'hard sell' in those markets," said Tom Ewing, "But the continued growth of the Internet in these smaller European markets may well change the make up of the audience. In the meantime this research underlines how European markets differ from each other, and how a one-size-fits-all marketing approach to the region may not be the best policy."

Germany		
Domain	% of Audience In Higher-Income Band	Category
fdlatestnews.de	81.39	Financial Info
aspect-online.de *	71.13	Banking
vidado.com *	70.74	Travel Bookings
ibm.com *	70.22	Computers
meinabo.de	67.28	Magazine Subscription Service
dab-bank.com	66.92	Banking
babylon.co.il	66.34	Online Dictionary Services
free-sms.de *	62.74	Mobile Communications
ratequiz.com *	61.24	Online Gambling
samsung.de *	61.07	Corporate Info

Italy		
Domain	% of Audience In Higher-Income Band	Category
bpath.com *	55.83	Web Services
katamail.com	55.46	E-Mail
adobe.it *	52.85	Web Services
unipa.it *	47.18	University
sisal.it *	45.47	Online Gaming
unito.it *	43.28	University
info412.it *	41.54	Directories
ita-bol.com *	40.74	E-Commerce
alitalia.it	40.09	Airlines
terra.es *	39.47	Portals

Netherlands		
Domain	% of Audience In Higher-Income Band	Category
kleurplaten.nl *	37.42	Childrens Portal
nos.nl *	31.96	News And Info
nl.altavista.com *	30.9	Search Engines
rotamail.nl *	30.79	E-Mail
hccnet.nl *	30.29	Portal
symantec.com *	30.28	Computer Services
nationalelefoongids.nl *	30.05	Directories
tmfweb.nl *	30.02	ISP
terra.es *	29.71	Portal
autotrader.nl *	29.42	Automotive

Spain		
Domain	% of Audience In Higher-Income Band	Category
telefonica.net *	37.03	Directories
elmundo.es	30.44	Newspapers
elpais.es *	29.26	Newspapers
telepolis.com *	25.83	Portal
gencat.es *	25.16	Government
elcorteingles.es *	23.94	E-Commerce
infojobs.net *	23.31	Jobs
yahoo.com	23.26	Portal
tripod.com *	20.77	Online Communities
lacaixa.es *	20.62	Banking

Sweden		
Domain	% of Audience In Higher-Income Band	Category
delta-projects.com *	72.57	Computer Services
privataaffarer.se *	69.66	Financial News
golf.se *	66.24	Sports
skane.se *	65.66	Computer Services
netscape.com *	65.47	Computer Services
aos.se *	64.75	Portals
di.se	63.74	Financial News
bananaisland.com *	63.37	Online Communities
tiscali.se	63.27	Portals
handelsbanken.se	62.97	Banking

UK		
Domain	% of Audience In Higher-Income Band	Category
owe-less.com	91.74	Financial Information
ibiblio.org	91.47	Directories
fco.gov.uk	91.12	Government
assertahome.com	90.08	Property
dell.co.uk	89.68	Computers
qca.org.uk	89.59	Government
airmiles.co.uk	88.28	Travel
tes.co.uk	88.1	Education
soldit.co.uk	87.43	Property
btplc.com	87.08	Corporate Information

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