



B2B Purchase Influencers and Opinion Leaders

If you operate in the B2B marketing world or need to communicate with government officials, this must-read publication will tell you where you can reach your target audience, what specific media influence them, and what factors weigh in on their purchase decisions for a variety of product and service categories.

The Opinion Leaders study reveals the issues of most concern to executives by industry, and which specific media outlets are most influential among government officials (both state/ local and federal), as well as health care, legal, association, science, education, communications and business executives. A special section focusing on business executives identifies the top media properties used by them for business issues and reveals the most influential programs, publications, and Web sites.

ErDOS & Morgan, a leader in business-to-business research, has prepared this report exclusively for the 4A's. It presents insights from their "Purchase Influence in American Business Study" and their "Opinion Leaders Study" that are particularly relevant to the advertising community.

Key takeaways:

- Print is the preferred delivery mechanism of media content among opinion leaders in all industries. Digital barely factors into the lives of healthcare and state/ local government players, and is most popular among science, federal government, and association executives. State/ local government officials rely more on TV than any of the other groups.
- Across all industries, the most influential print, TV, and digital properties are: The New York Times, 60 Minutes, and NYT.com, each with a considerably larger percentage of fans than its nearest competitor.
- For business opinion leaders, while The New York Times and NYT.com are the most used for business issues, the Harvard Business Review, Foreign Affairs magazine, and WSJ.com are rated as more influential.
- Advertising & promotion related activities top the list of purchases in which senior executives of companies with sales of \$1 million+ are involved (46%), an increase of five percent over the previous study.

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PEOPLE WITH CLOUT: “Identifying B2B Influencers”

What’s your take on how the past several years of economic belt-tightening have affected businesses, organizations and the government? These somewhat demanding years have us all more alert to the unique and sometimes intricate methods used by business influencers to “persuade people towards their point of view.” Here we have an in-depth analysis of two studies from an eminent industry leader in Business-to-Business influencer research — the Erdos and Morgan Purchase Influence in American Business Study and the Erdos and Morgan Opinion Leaders Study — to provide clues as to what defines today’s foremost influencers in business and government. We’ll take a close look at how they drive and shape the top business issues and purchase decisions, the media that motivates them and how that’s changed from a few years ago.

Both studies began evaluating the *influencer* segment in 1988, but among different, yet complementary, population segments. Over the years, both studies have been fine-tuned to accommodate new company and job data, new products and services entering the markets, newly defined issues, as well as the various media sources and tools that enter and exist, surge and decline in their influential roles.

THERE’S A HISTORY ...

In 1944, Paul Lazerfeld¹ (one of the first to study communications research and expanded upon with E. Katz in 1955²), hypothesized that ideas flow from mass media to opinion leaders, and from them to a wider population (the two-step flow of communication model). The people with most access to media, and having a more literate understanding of media content, explain and diffuse the content to others.³ Opinion leaders are individuals who obtain more media coverage than others and are especially educated on a certain issue. Since then, myriad consequential studies have disputed and negated the two-step model, asserting that initial mass media information flows directly to people on the whole and is not relayed by opinion leaders.⁴ Everett Rogers’ “Diffusion of Innovations” posed that mass-media channels are more effective in creating knowledge of innovations, whereas inter-personal channels are more effective in forming and changing attitudes toward a new idea, and thus in influencing the decision to adopt or reject a new idea.⁵ The question remains open as to who wields more influence, however, it is clear that both opinion leaders and media vie for their positions. Influence itself can range from positive to negative; it can be loose interactions, it can equate to advocacy, and most recently it can be about friending, following, posting, tweeting and texting. Influence touches everyone in business or the public arena who is susceptible, or who feels it is in their best interest to be influenced.

INFLUENCE CYCLE...

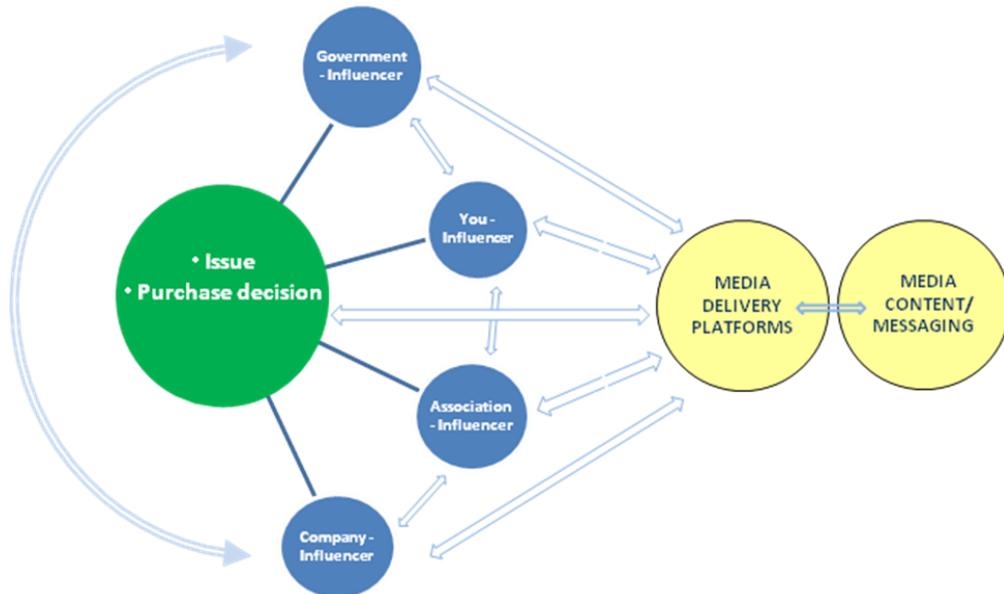
Everyone has their eye on everyone else: how they think, what they buy, what they read, hear and view, the ways in which information is passed along to others, and who is most likely to influence issues and engage in decision-making.

The various media sources, including digital media, social media and the mobile devices of today, influence the influencers and the issues, and act as a major conduit of all news and information. Each action and decision spawns new and different reactions, and continues the cycle. The influence cycle tends to spin on somewhat the same track picking up new criteria, new leaders and new media and tools from all of the available sources. While media may be the major conveyor of all that is influential, it takes savvy business and opinion leaders to recognize and act on the relevant information.

Advertisers cull through the information, develop media content and select delivery platforms to present as marketing knowledge even though it came from you — so consider yourself influenced and influencer.

This cycle (charted) gives you an idea of how simple yet complex it can be, who the players are, and a roadmap of how influence might be shared and promulgated — whether through subtle personal interactions and conversations, social networking, media content delivery or broadcast, boardroom negotiations or spirited lobbying.

THE INFLUENCE CYCLE



ERDOS AND MORGAN PURCHASE INFLUENCE IN AMERICAN BUSINESS STUDY

Purchase Influence in American Business studies the purchasing power of senior executives at headquarter locations of companies with sales of \$1 million or more, and the media they use. The study reports the involvement of these purchase decision-makers across 67 individual areas in 10 Product/Service Categories.

SMALLER COMPANIES PREVAIL IN CURRENT ECONOMY ...

The 2010–2011 PIAB Study reveals companies to be much more compact compared to the 2008–2009 Study findings. We saw double-digit decline in the number of companies with 100 or more employees. This shift in company size means changes in job titles: 70% of executives have CEO/President/COO or owner/partner job titles compared to only half in the previous study, with more in VP, directors and manager positions as well as serving on their own Board of Directors. A decline in sales volume in these smaller companies is typical. The recent study shows 8% work in companies with sales volume of \$50 million or more, where previously 26% did so. Companies with fewer employees than in previous studies appear in the Fortune 500, and more focus on positions in Finance and Purchasing/Procurement — all the fallout of companies attempting to thrive in a tighter economy according to the 2010–2011 Study.

PRODUCT/SERVICE CATEGORIES SHIFT IN IMPORTANCE ...

We see a definite shifting of priorities by executives across the top purchase decision categories in the current PIAB Study compared to the previous study. This is, in part, due to the enormous increase in technology, with Wireless and Mobile Technology & Services seeing a 10% gain. Conversely, purchase decisions for Fax, Duplicators, Copiers & Related Supplies declined by 16%, as did Desktop Computers/Workstations and Office Furnishings/Fixtures/Supplies — both down by 6% compared to the previous study. The most recent study also shows a current need for more financial accountability (Accounting/ Auditing /Bookkeeping Services is up 7%), and wiser decisions in advertising/promotional opportunities (Advertising & Promotion is up 5%).

Top 10 Product/Service Categories*	% Involved in Purchase Decisions		
	2010 – 2011 Study	2008 – 2009 Study	% Change
Advertising & Promotion Related Activities	46%	44%	5%
Accounting/Auditing/Bookkeeping Services	46%	43%	7%
Marketing Services	35%	NA	--
Group Life/Health Insurance	35%	34%	3%
Commercial Banking	34%	33%	3%
Wireless and Mobile Technology & Services**	34%	31%	10%
Office Furnishings/Fixtures/Supplies	34%	36%	-6%
Airline/Hotel and Car Rental	32%	32%	0%
Desktop Computers/Workstations	31%	33%	-6%
Fax, Duplicators, Copiers & Related Supplies	31%	37%	-16%

* Ranked by % of involvement in 2010–2011 Study. ** Wireless Equipment/Services in 2008-2009 Study. Purchase Influence in American Business Study. Erdos and Morgan Purchase Influence in American Business Studies, 2010–2011, 2008–2009

ATTRIBUTES CONSIDERED IN PURCHASE PROCESS

Other considerations of purchase influencers measured by the PIAB Study are the **importance of attributes when purchasing products and services**. Out of 14 attributes, customer service remained the most important to over 4 in 5 decision-makers in recent studies, while price and durability fell off slightly. However, respondents' assessment of delivery time dropped by 10% in the more recent study.

Top Attributes Evaluated When Purchasing	% Said Attribute was "Very Important"		
	2010 – 2011 Study	2008 – 2009 Study	% Change
Customer Service	83%	83%	0%
Price	74%	75%	-1%
Durability	74%	76%	-3%
Delivery Time	63%	70%	-10%

ErDOS and Morgan Purchase Influence in American Business Studies, 2010–2011, 2008–2009

INFLUENTIAL MEDIA ...

The media that senior executive purchase decision-makers rely on most often is nearly identical across all product/service categories and across Total Involvement, \$10,000 or More in Expenditures in the Past 12 Months or Approve or Authorize Purchase in the 2010–2011 PIAB Study.

Print is the format most used by executives, and of the 47 print vehicles reported, the most popular brands are *The Wall Street Journal*, *Time* and *USA Today*. In digital, among the 52 news and business Web sites reported, CNN (*cnn.com*), Fox News (*foxnews.com*) and ABC News (*abcnews.com*) pull in the most unique monthly visitors among executives. When it comes to TV viewing, ABC World News Tonight with Diane Sawyer and NBC Nightly News with Brian Williams top the list out of 55 weekday and weekly programs.

MEASURING NEW MEDIA TOOLS...

Social media and mobile/handheld devices are now ubiquitous tools of senior executives and add another dimension to their access of media brands. The availability of information through mobile/handheld devices fulfills immediacy needs, and can alter the decision-making process and response time. Besides the traditional Web site visits made by 74% of executives, 3 in 10 also access media through smartphones, and 2 in 10 via Apple iPads. Executives say their companies have developed APPS and other information to be used with social media. Facebook (25%), LinkedIn (23%) and Twitter (15%) are the most popular.

ERDOS AND MORGAN OPINION LEADERS STUDY

ISSUE PRIORITIES CHANGE ...

The **top issues**, according to the 2011 Erdos and Morgan Opinion Leaders Study, are identical to the top issues in the 2010 Opinion Leaders Study and are determined by the percent involvement each attains from 10 Leadership Groups defined in the study.

The 195 specific issues measured by the Erdos and Morgan Opinion Leaders Study have been classified into **11 Major Issue Classifications**. ➡

Major Issue Classifications:
 Business • Health, Education, Human Services • Law and Legal • Environment & Energy • Economic & Financial • Science & Technology • Legislative/Govt. Policy • Defense & National Security • Arts & Media • Agricultural • Trade/Global Economic

% of Leadership Groups Involved in Issues*			
Top Major Issues - 2011 rank	2011	2010	% Change
Business	84%	80%	5%
Health, Education, Human Services	84%	78%	8%
Law and Legal	69%	64%	8%
Environment & Energy	66%	62%	6%
Economic & Financial	62%	56%	11%
Science & Technology	60%	57%	5%

**Leadership Groups involvement in 5 other Major Issue Classifications drops off significantly. Erdos and Morgan Opinion Leaders Studies, 2011 and 2010*

Among the Major Classifications, Business Issues represent the greatest involvement by the Leadership Groups and are followed by Health, Education and Human Services Issues, as they have historically. With each new study, the top issues arise by contributions from administrative change (at all government levels) and their resulting bills and laws, new and merging companies and their new direction and practices, and ultimately the power of the media.

Looking at trends, involvement in Economic and Financial Issues grew substantially from the 2010 Study to the 2011 Study — a fair reflection of the current economy.

To further define the Major Issue Classifications, **20 Issue Subgroups** (including 4 major classifications with no subgroups) provide additional description and focus in on the two or three general areas within each major issue. These 20 Subgroups are used to reveal the extent to which Leadership Groups are involved in issues. ➡

20 Issues Subgroup
 (includes 4 major classifications with no subgroups):
 Government/Self-Regulation of Business • Business & Industry • Environmental • Energy • Healthcare • Educational • Social/Human Services • Civil & Human Rights • Legal • Women’s • Agricultural • Defense & National Security • Science • Technology • Economic/ Fiscal Policy • Social Security & Retirement • Arts & Media • Electoral • Governance • International Trade/Global Economic.

LEADERSHIP GROUPS SHAPE AND INFLUENCE ISSUES ...

Opinion leaders are defined as those individuals whose influence on business, social, political, environmental and educational issues far exceeds that of their peers in this study. They exercise far-reaching and powerful influences on the opinions of their fellow Americans by framing and defining the issues that will largely determine the future course of the nation.

Opinion leaders are categorized into 10 Leadership Groups that influence other individuals, media, other Leadership Groups and ultimately — the issues. The number of issues cited in the following chart (requires at least half (50%) of those in a Leadership Group be involved with any of the 20 Subgroup Issues) reveals the most involved and influential groups.

# of 20 Subgroup Issues Influenced by 50% or More of Leadership Group			
Leadership Group	2011	2010	% Change
State/Local Government	17	14	21%
Law (Private Sector)	9	7	29%
Communications/Media (Private Sector)	9	4	125%
Science (Private Sector)	8	5	60%
Congressional Branch Government	7	9	-22%
Healthcare (Private Sector)	7	5	40%
Executive Branch Government	7	3	133%
Associations	6	4	50%
Business (Private Sector)	6	6	0
Education (Private Sector)	5	6	-17%

Erdos and Morgan Opinion Leaders Studies, 2011, 2010

Over half of State/Local Government leaders are involved in 17 of the 20 Subgroup Issues, according to the 2011 Study. Leaders in Law influence 9 issues including Business, Environmental, Healthcare, Social/Human Services, Civil Rights, Economic/Fiscal Policy, Governance and, of course, Legal. Communications/Media leaders influence 9 issues: Business, Environmental, Healthcare, Educational, Social/Human Services, Civil Rights, Technology, and of course, Arts and Media.

The trends from 2010 to 2011 appear to be somewhat on track, as media and popular opinion have suggested over the last few years. State/Local and Executive branches have become increasingly involved in issues, while the Congressional branch has been somewhat stagnant. Leaders in Communications & Media have more than doubled their involvement in issues, and those in Science, Associations and Healthcare have also seen increased involvement, as seen in the most recent study.

Notable highlights from the 2011 Study (not charted above) appear to support some popular thought:

- Over half of all 10 Leadership Groups are involved in Government/Self-Regulation of Business
- Over half of all Groups (except Congressional Branch) are involved in Environmental issues
- Over half of all Groups (except Congressional Branch) are involved in Healthcare issues
- Only the State/Local Government is at least 50% involved in Women's issues

MEDIA SYNERGY...

Media plays multiple roles in the influence cycle. It first creates content as fact, perspective, entertainment or advertising, and then ultimately influences those in leadership positions through the various delivery mechanisms available. Leadership Groups turn to the most useful and relevant media brands for insight into issues via their preferred delivery sources (print, TV, digital, etc.). Media influences by delivering information to all Leadership Groups, but is influential in its own right as well.

The maximum impact of media can be seen through the synergy of multiple delivery platforms across a single brand — increasing not only the reach, but the number of exposures to a message. This is evident from the largest newspapers that provide access to their brand through multiple platforms. The addition of digital to print brands provides more exposure (gross impressions) and offers opinion leaders alternative, and often more mobile, media delivery sources.

2011 Study		Media Synergy for The New York Times			
Leadership Group	NYT* Net All	NYT Print GI	NYT Digital	NYT Gross Impressions	Avg. Freq.
Associations	15,178	20,310	8,954	29,264	1.9
Law	63,325	91,306	31,908	123,214	1.9
Communications/Media	16671	24241	9913	34,154	2.0

NY Times = NY Times daily, NY Times Sunday edition, nyt.com. NYT Print GI=Gross Impressions of NY Times Daily and NY Times Sunday Edition. Erdos and Morgan Opinion Leaders Study 2011

In the 2011 Opinion Leaders Study, The New York Times brand reaches over 63 thousand in the Law Leadership Group; however, the 3 platforms (New York Times Daily, New York Times Sunday Edition and nyt.com) deliver over 123 thousand exposures – in fact, about 2 per person. The more platforms a brand has available to deliver the message, the more opportunity it has to influence.

2011 Study		Media Synergy for The Wall Street Journal			
Leadership Group	WSJ* Net All	WSJ Print	WSJ Digital	WSJ Gross Impressions	Avg. Freq.
Associations	16,160	15396	8,408	23777	1.5
Law	56,944	54,489	26,017	80506	1.4
Business	58,430	56,130	22,084	78214	1.3

**WSJ = The Wall Street Journal, wsj.com. Erdos and Morgan Opinion Leaders Study 2011*

The Wall Street Journal reveals a similar story when digital is added to print. Reach increases along with the number of exposures to the message.

PREFERRED MEDIA...

These publications, TV programs and Web sites top the lists for total readership, viewership and unique monthly visitors in the 2011 Opinion Leaders Study. Note that many brands rank in the top-10 across multiple delivery platforms.

Print	%	TV	%	Digital	%
The New York Times	58%	60 Minutes	50%	The New York Times – nyt.com	33%
The Wall Street Journal	49%	Anderson Cooper 360°	31%	CNN – cnn.com	28%
USA Today	46%	NBC Nightly News – Brian Williams	31%	Washington Post – washingtonpost.com	23%
The Washington Post	37%	BBC World News	30%	The Wall Street Journal – wsj.com	21%
Time	36%	The Daily show with John Stewart	29%	The Huffington Post – huffingtonpost.com	17%
National Geographic	35%	Meet the Press	29%	FOX News Channel – foxnews.com	16%
Newsweek	34%	PBS News Hour	28%	WebMD – webmd.com	15%
NY Times Sunday Edition	31%	20/20	25%	ABC News – abcnews.go.com	14%
The New Yorker	31%	The Colbert Report	24%	MSNBC – msnbc.msn.com	14%
AARP Bulletin	29%	Dateline	24%	BBC – bbc.co.uk	12%

Erdos and Morgan Opinion Leaders Study 2011

The Opinion Leader Study evaluates a unique population and also measures media that is truly distinct to select Leadership Groups. These niche publications and their respective web sites add new dimension to media influence. Besides reading the mass publications, opinion leaders in the Executive Branch of Government are likely to read publications such as *Federal Times* and *Government Executive*. Those in the Congressional Branch turn to *Roll Call*, *Politico*, *CQ Today* and *CQ Weekly*, *The Hill* and *The National Journal*, and their respective Web sites; while State/Local Government leaders read *Governing* and visit its Web site. Leaders in Health, Education and Law are influenced by their respective journals and reviews. Those in Science look to *The Economist*, *Science*, *Scientific American* and *National Geographic*, as well as their digital versions.

While the Opinion Leaders Study covers much more than Business issues, here we focus in on the media most used to influence business issues. Here's the **Top 10 in Print and TV** from the 2011 Study). ➡

In addition, these **Top Web sites** are used most often by Unique Monthly Visitors to influence business issues.

TOP WEB SITES USED TO INFLUENCE BUSINESS

The New York Times - nytimes.com	30%
The Wall Street Journal – wsj.com	25%
CNN - cnn.com	22%
FOX News Channel – foxnews.com	19%

TOP 10 PRINT/TV USED TO INFLUENCE BUSINESS ISSUES

The New York Times	60%
The Wall Street Journal	54%
60 Minutes (CBS)	51%
USA Today	48%
The Washington Post	40%
Time	37%
National Geographic	35%
Newsweek	35%
Anderson Cooper 360° (CNN)	33%
NBC Nightly News with Brian Williams	31%

The study explores the impact of media on opinion leaders in myriad ways, and most important to this discussion is the qualitative composition measure of *Most Influential*. This rating is based upon the perception of each reader/viewer/unique monthly visitor about the media they used. **Their top choices:**

MOST INFLUENTIAL PRINT AND TV PROGRAMS	MOST INFLUENTIAL WEB SITES
Harvard Business Review Foreign Affairs The New York Times The New England Journal of Medicine The Economist The Wall Street Journal The New York Times Sunday Edition Science JAMA: The Journal of the American Medical Association PBS News Hour	The Wall Street Journal – <i>wsj.com</i> The New York Times – <i>nytimes.com</i> Foreign Affairs – <i>foreignaffairs.com</i> Science – <i>sciencemag.org</i> The Economist – <i>economist.com</i> Harvard Business Review – <i>hbr.org/magazine</i> The New England Journal of Medicine – <i>nejm.org</i> JAMA: The Journal Amer. Med. Assn. – <i>pubs.ama.assn.org</i> The Washington Post – <i>washingtonpost.com</i> The Chronicle of Higher Education – <i>chronicle.com</i>

Opinion leaders also rated the media they used as *Most Objective, Most Current, Most Credible and Most Enjoyable*. Many print titles, TV programs and Web sites earned top ranking in more than one of these qualitative categories.

MEDIA: CONTENT DELIVERY ...

Leadership Groups choose content delivery preferences depending upon the various platforms available to them from the media they use most often. While they are exposed to content through all three basic platforms (print, TV programming and digital), the following chart shows their preferred delivery, which may hinge on the availability of that platform from the media brand.

To read this chart: The # of Media Used required that a print vehicle cover 40% or more, a TV program cover 40% or more, and a digital site cover 30% or more (slightly lower threshold since it is a more recent measurement and a relatively new source to this genre of leaders) of a Leadership Group. Preferred delivery platforms add to 100%.

2011 Opinion Leaders Study		Preferred Delivery of Media Content*			
Leadership Groups	# of Media	Platforms/Brands	% Print	% TV	% Digital
	Congressional Branch Government	29		59%	3%
Associations	19		53%	11%	37%
Communications/Media	12		67%	17%	17%
Executive Branch Government	10		60%	10%	30%
Science	9		44%	11%	44%
State/Local Government	9		67%	33%	0%
Law	8		63%	13%	25%
Healthcare	6		83%	17%	0%
Business	5		60%	20%	20%
Education	4		50%	25%	25%

*Thresholds: Print = 40% +; TV=40%+; Digital = 30%+. For example: 29 media had 40% or more coverage in the Congressional Branch of Government. Erdos and Morgan Opinion Leaders Study 2011

In some cases, opinion leaders may use the same media brand from two different platforms – most often print and their digital counterpart.

We see the Congressional Branch was exposed to 29 different media according to the 2011 Opinion Leaders Study (using the thresholds noted). Nearly 6 in 10 (59%) of the Congressional Branch preferred content in print, 3% via TV programs, and 38% opted for the digital format.

While the preferred delivery platform by the different Leadership Groups is interesting in itself, the real point here is that the Congressional Branch is exposed to 29 different media, yet they are active in only 7 of the 20 issues. The Associations are much the same – exposed to 19 different media – yet involved in only 6 of 20 issues. In contrast, the State/Local Government Leadership Group is involved in 17 of 20 issues, yet the quantity of media they are exposed to is fairly meager (9 media).

On average for all Leadership Groups, print was the preferred delivery medium of 61%, digital by 24% and TV programs by 16%.

WRAP UP ...

Whether purchase decision-makers or opinion leaders (and very likely both), the scope and priorities of their interests, issues and decisions are similar, and the influence cycle is a well-used but timeless model. Leadership Groups and individual influencers bombard each other with hard facts, rumors and creative ideas and the media runs with it — informing, educating, persuading — but not without adding a little influence on its own behalf.

Changes indicated by the Purchase Influence in American Business studies support the current economic conditions. Companies have downsized in both number of employees and sales volume. The significant growth of wireless and mobile technology and related services has caused a sizable purchase increase in that category. Social media and mobile/handheld devices are the most engaging new media tools as current PIAB user levels indicate. Conversely, with the surge of wireless and mobile, we see significant declines in the areas of fax, duplicators, copiers, desktop computers/ workstations and office furnishings and supplies. A need to monitor and grow business in the down economy, and the expanding wireless and mobile tech market, contributed to the modest increases in financial and advertising products and services.

Broadly, the Opinion Leaders Study reveals the major Issues in 2011 to be Business; Health, Education and Human Services; Law and Legal, Environment & Energy, Economic & Financial and Science & Technology. Currently the most influential Leadership Groups are Communications/Media, State/Local Government and Law, with a substantial increase among those in the Executive Branch of Government over the previous study. Involvement by the Congressional Branch, on the other hand, has dropped considerably vs. the prior study. Opinion Leaders Studies' findings also support the current events that have transpired over the past several years — particularly in the shifting accountabilities of the 3 branches of government.

Respondents in both studies agree on their preferred media across print, digital and TV programming platforms. Of significant importance is the enormous growth of the digital format for many brands, and access through various mobile devices. Across all delivery formats, a handful of media have amassed the most regular readers and viewers, and unique monthly visitors, according to both the recent Purchase Influence in American

Business Study and the Opinion Leaders Study. However, new niche media focusing in on specific issues is consistently being introduced and embraced by business influencers and opinion leaders.

The who's who in business influencers and opinion leaders changes from year to year and study to study as indicated by both Purchase Influence in American Business and Opinion Leaders. Changes may stem from the economy, politics, social mores, global issues, etc. Issues, leaders, media brands and formats have interchanging and evolving roles; however, the influence cycle mechanism itself is a constant on which we can depend.

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