

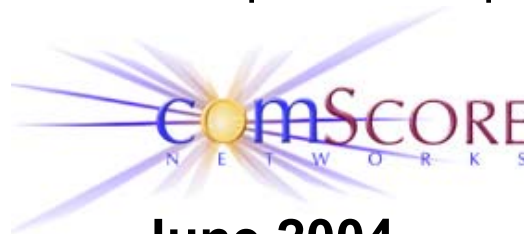


Dedicated to representing the highest standards in Internet publishing

The Broadband-Enabled 18 to 34 Year-Old:

Behavioral Analysis

Conducted in partnership with



**June 2004**

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# Sourcing

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- ALL data contained in this report must be appropriately sourced to:

**Online Publishers Association/comScore  
Networks, June 2004**

# Methodology

- This report was compiled using data from comScore Media Metrix
- comScore Media Metrix data is based on a representative cross-section of more than 1.5 million global Internet users, who have given comScore explicit permission to monitor their Web-wide browsing, buying and other transaction behavior
- Audience insite Measures (AiM) combines continuously observed Internet behavior measurement with comprehensive attitudinal, lifestyle and product usage data from the same representative consumer panel
- All comScore Media Metrix syndicated ratings are based on industry-sanctioned sampling methodologies
- For the purposes of this report, the Adult category was specifically excluded

# General Information: Broadband Access & Usage

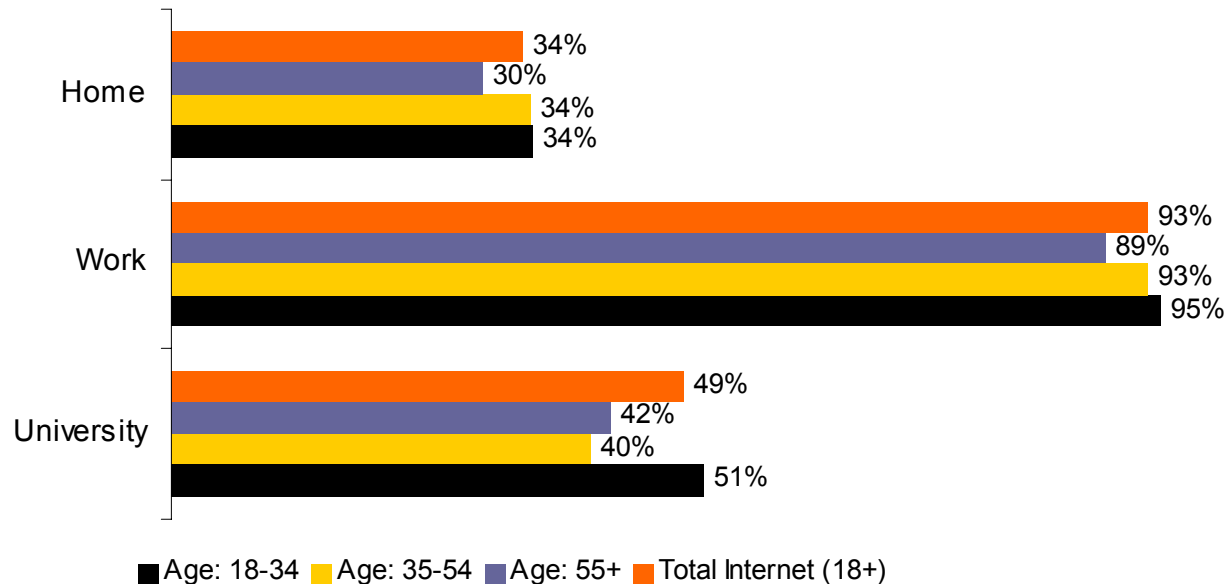
# 18-34 Broadband Usage

- The distribution of 18-34 year olds currently using broadband from home or work does not differ significantly from the average
- However, among internet users who are still on dial-up connections at home, a larger percentage of 18-34 year olds say that they are extremely or very likely to have a broadband connection installed within the next six months
- Having high-speed access translates to more time spent online for all internet users, but the increase is most pronounced among 18-34 year olds
- A large percentage of the additional time online by broadband users (when compared to their dial-up counterparts) in this age group is spent on entertainment and content sites

# BB Penetration Among 18-34s is Consistent with the Average...

- As with all other age groups, Work Internet access is predominantly broadband for 18-34 year olds
- The percentage of Home users with broadband is also not significantly higher than the norm

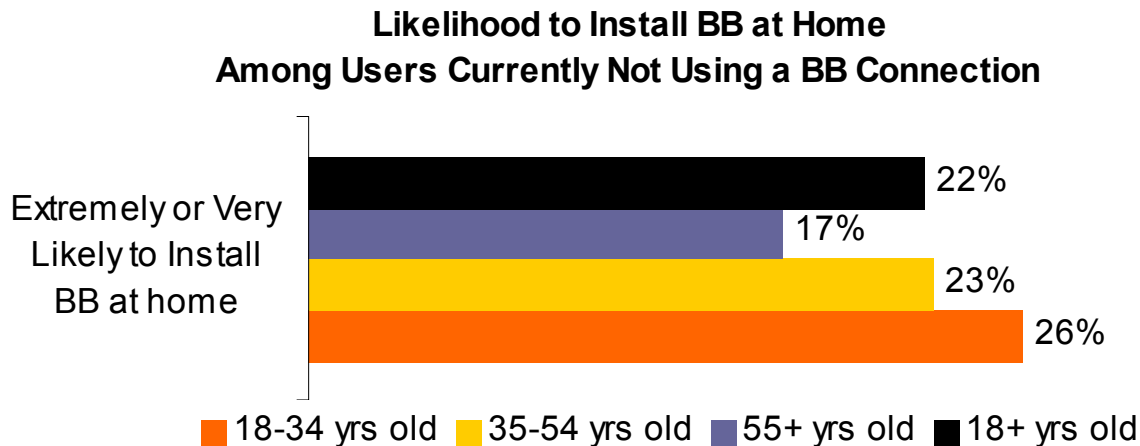
Location of Internet Access by Age Group



Data source: Media Metrix October 2003

# ...But More of Them with Dial-up Plan to Upgrade Soon

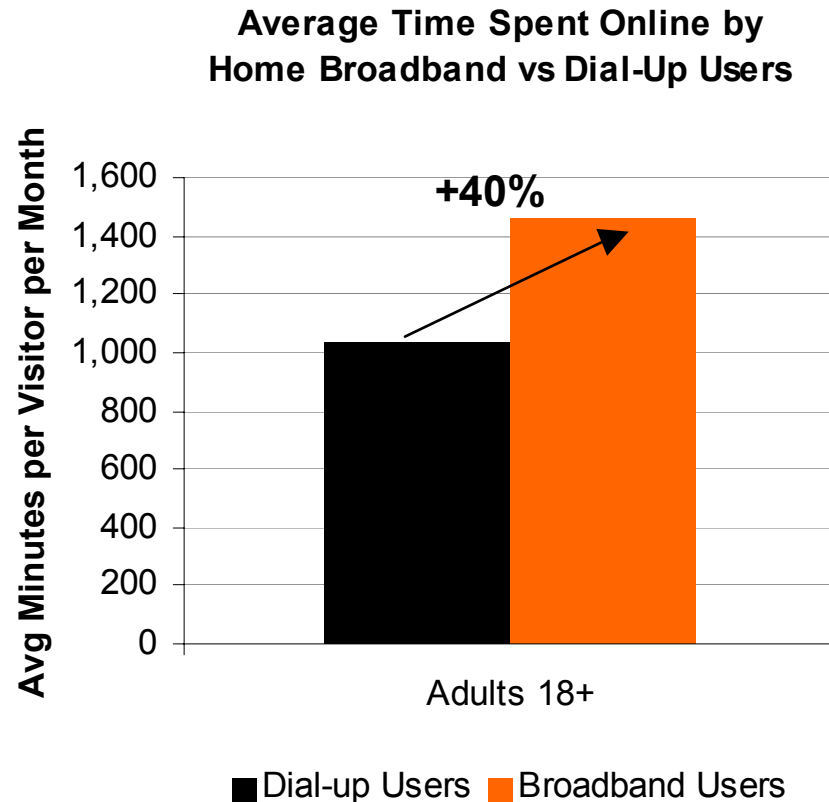
- Among Internet users who are not already using high-speed access from home, 18-34 year olds are far more likely to say that they are “Extremely” or “Very Likely” to install broadband at home



Data source: comScore Media Metrix Audience Insite Measures (AIM), Fall 2003;  
Base: Home Users using a Dial-up Phone Line or Don't Know connection method



# Adult Broadband Users Spend 40% More Time Online than Dial-up Users

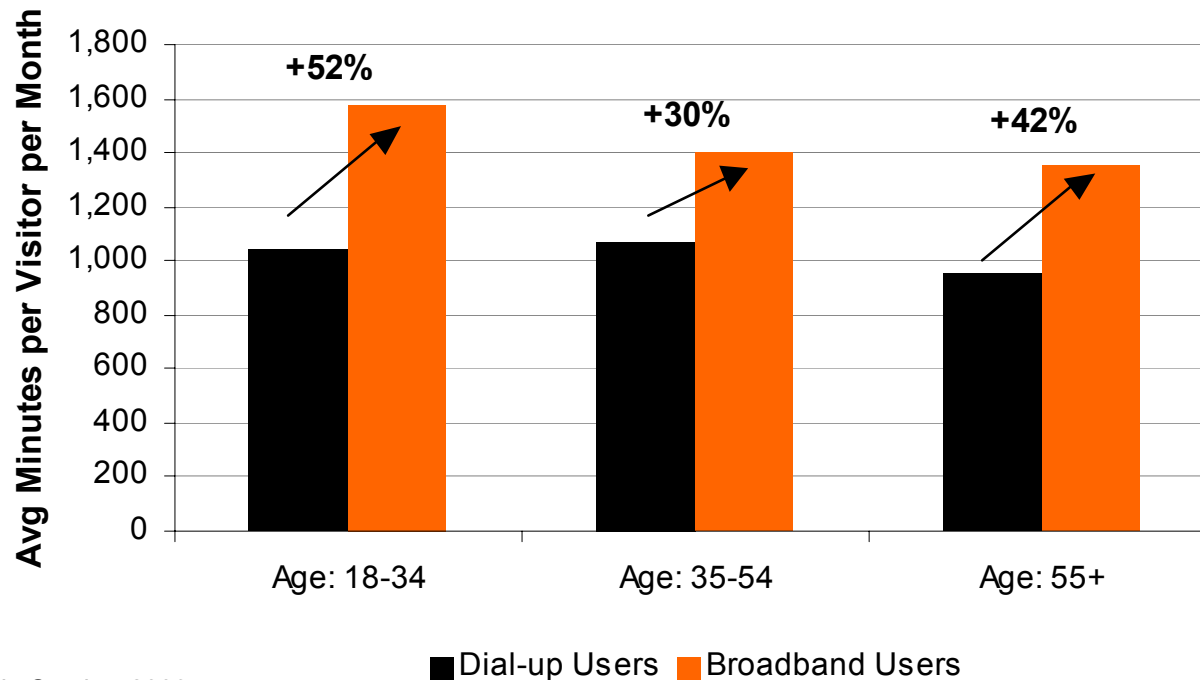


Data source: MyMetrix October 2003, U.S. Home Audience

# This Effect is Greater for 18-34s Than Any Other Age Group

- Having a broadband connection translates to more time spent online for all age groups, but the largest increases are observed among 18-34 year olds

**Average Time Spent Online by Broadband Users**



Data source: MyMetrix October 2003

# Broadband Impact on Category Usage

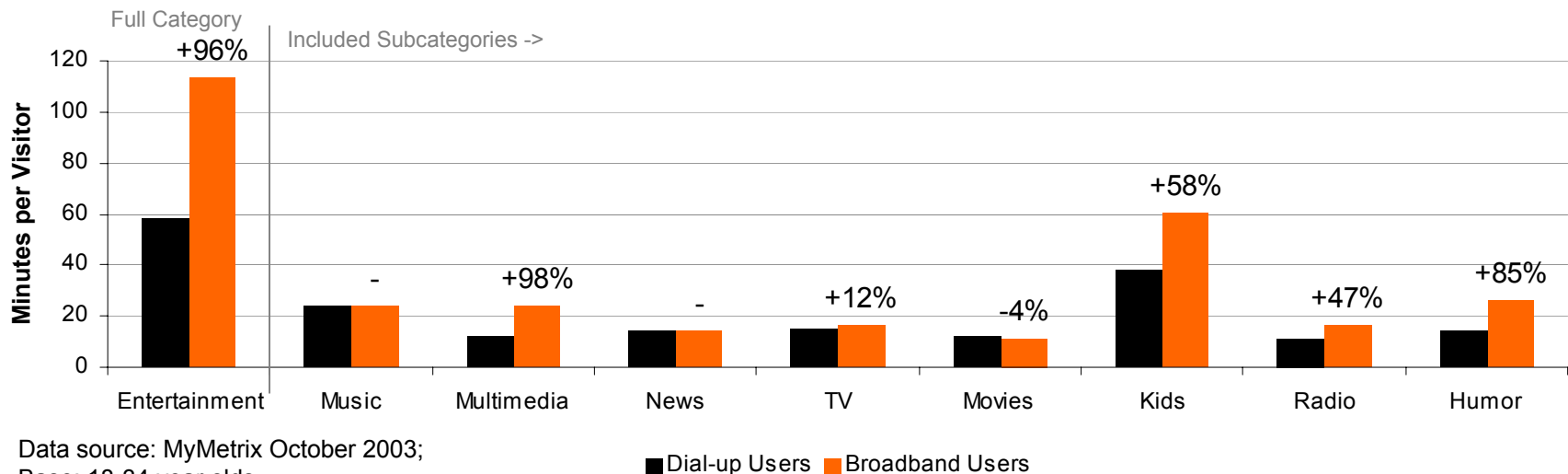
# Categories with Increased Usage from Broadband

- The relative increase in time spent on a percentage basis by 18-34 year olds with broadband connections (compared to those with dial-up) at home are not parsed out equally among their categories of interest:
  - Entertainment sites with multimedia and streaming capabilities see the largest increases on a percentage basis
  - News sites also see strong percentage increases among 18-34 year-old BB users, demonstrating that an “always on” connection is likely to affect a user’s perception of the internet as a major source of news and information
  - Sports and Games sites get a significant increase in usage levels among BB users, magnified by their high baseline usage levels
  - While still strong on an absolute basis, e-mail and IM increase only moderately on a percentage basis among 18-34 year olds with BB
  - Time spent on Retail sites and “utility” sites such as Banking is not significantly affected by faster internet connections among this group

# 18-34s with BB Spend More Time on Entertainment Sites with Interactivity

- Having a BB connection results in almost twice as much time spent on the Entertainment category by 18-34 year olds
- Entertainment subcategories incorporating streaming activity are clearly driving the increased usage by broadband users
- Kids' entertainment usage driven by young parents spending more time online with their children viewing kids' entertainment when using a BB connection

**Average Time Spent Online by 18-34 year olds**  
**BB vs Dial-Up : Entertainment and Subcategories**

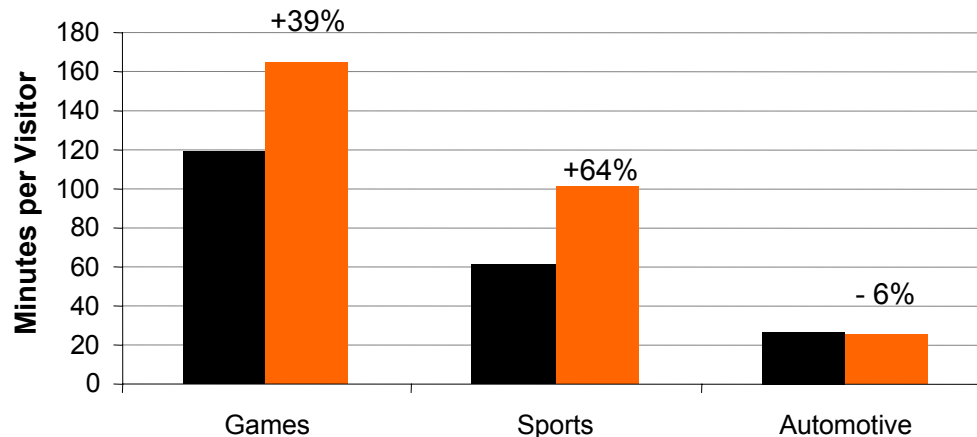


Data source: MyMetrix October 2003;  
Base: 18-34 year olds

# Gaming & Sports Sites See More Usage Among BB Users Age 18-34

- Of the three “traditional” categories of interest for 18-34 year olds, particularly males, Sports sites see the highest increase in usage by broadband users. As more sports sites offer interactivity and streaming media in their online offerings, users with faster connections are logging on more frequently, and staying engaged longer
- Automotive sites do not see similar gains

**Average Time Spent Online by 18-34 year olds**  
**BB vs Dial-Up : Games, Sports, Auto**



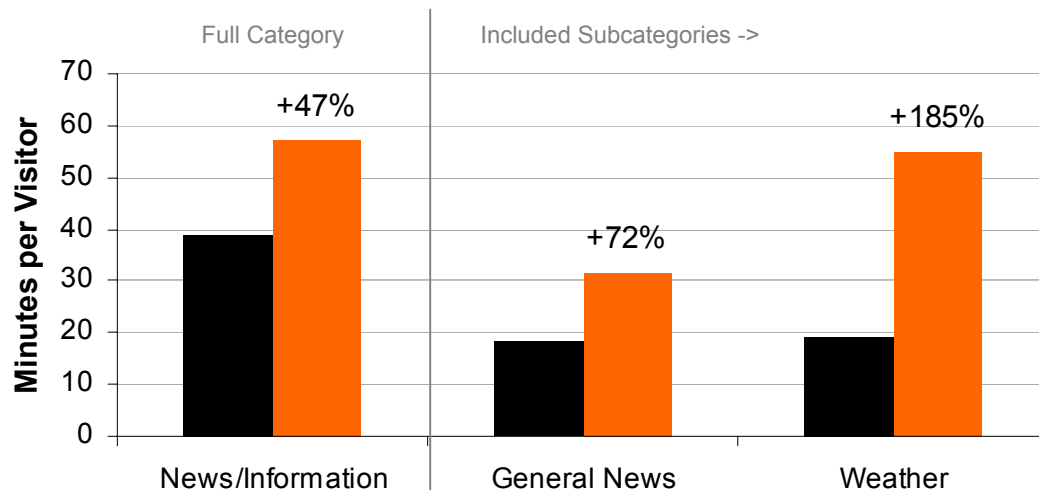
Data source: MyMetrix October 2003;  
Base: 18-34 year olds

■ Dial-up Users ■ Broadband Users

# BB Drives Large Increase in Use of News Sites Among 18-34s

- In the News/Information Category, average time spent on General News sites increases 72% among 18-34 year olds who have a broadband connection
- Usage of weather sites among users with BB is almost triple that of dial up users

**Average Time Spent Online by 18-34 year olds  
BB vs Dial-Up : News/Info and Subcategories**



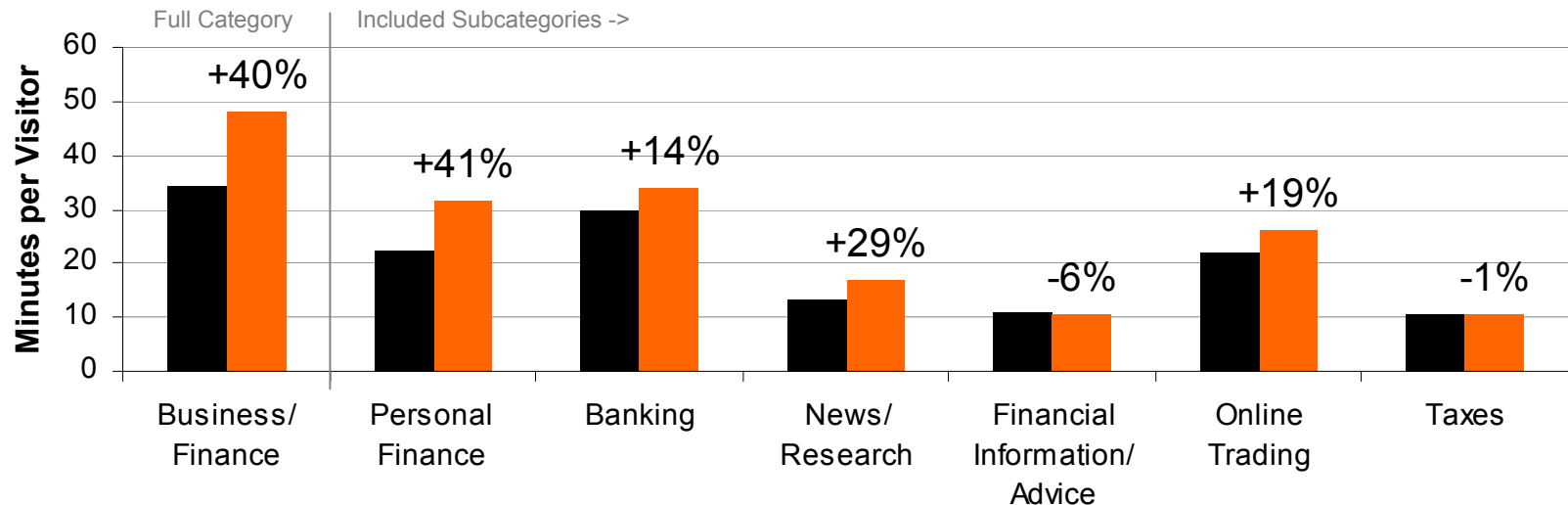
Data source: MyMetrix October 2003;  
Base: 18-34 year olds

■ Dial-up Users ■ Broadband Users

# 18-34 Year-olds with BB Spend More Time on Business/Finance Sites

- The increased time spent by 18-34 year olds with BB on the Business/Finance category is driven primarily by additional time spent on Personal Finance and Financial News/Research sites

**Average Time Spent Online by 18-34 year olds  
BB vs Dial-Up : Business/Finance and Subcategories**



Data source: MyMetrix October 2003;  
Base: 18-34 year olds

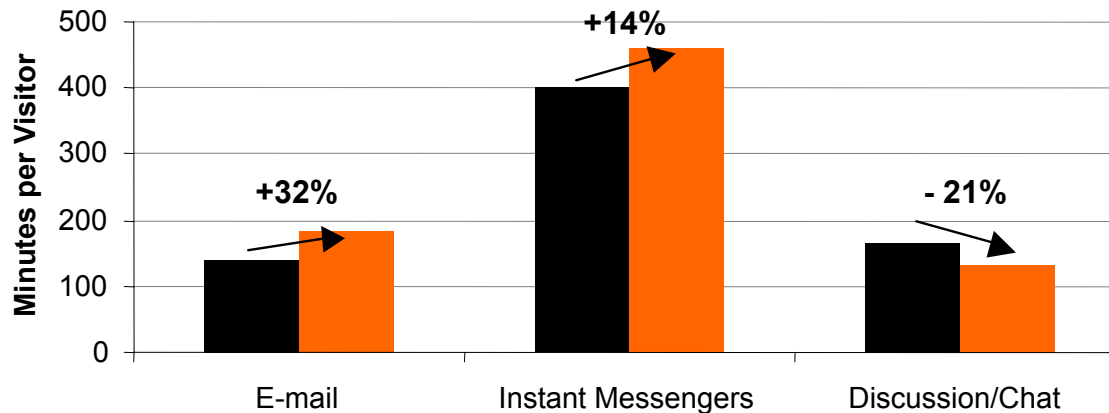
■ Dial-up Users ■ Broadband Users



# For 18-34s, Largest Gains are NOT in Communication-related Categories

- Although use of IM and e-mail increases among 18-34 year olds with broadband, the percentage increases in time spent are not as dramatic as in other categories
- Discussion/Chat usage is *less* among 18-34 year olds with broadband than among dial-up users

**Average Time Spent Online by 18-34 year olds  
BB vs Dial-Up: Communication**



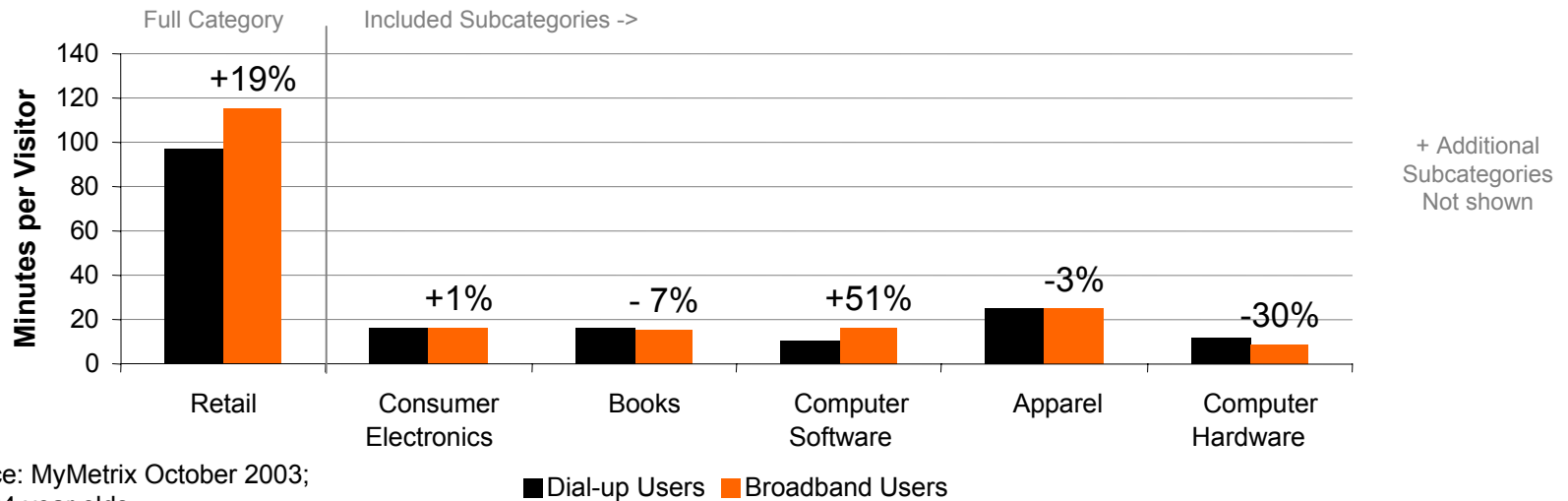
Data source: MyMetrix October 2003;  
Base: 18-34 year olds

■ Dial-up Users ■ Broadband Users

# BB Access Does Little to Elicit Additional Shopping Time Online

- Having a BB connection does not translate to significantly more time on Retail sites for 18-34 year olds, even in the most popular categories for this group
- Even in Computer Software, where the largest percentage increase is observed, this translates to only an additional 5 minutes spent shopping by broadband users vs dial-up users

**Average Time Spent Online by 18-34 year olds**  
**BB vs Dial-Up : Retail and Subcategories**



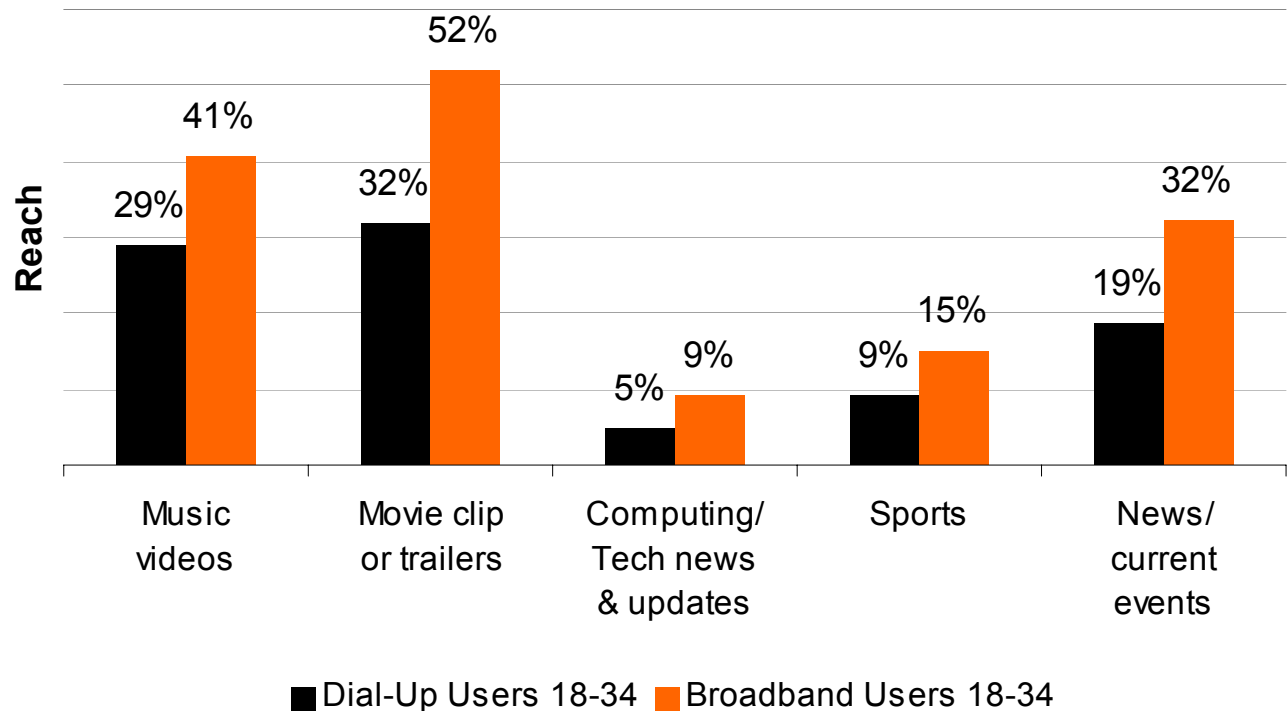
Data source: MyMetrix October 2003;  
Base: 18-34 year olds

# Broadband Impact on Online Video Consumption

# 18-34s with Broadband Watch Videos Online

- Not surprisingly, broadband users were more likely to view videos or video clips online than were dial-up users
- Of 18-34 with a broadband connection at home, more than half reported viewing a movie clip or trailer online, compared to less than a third of those with a dial-up connection

**18-34 Broadband vs. Dial-up Users who Viewed an Online Video in the Past 6 Months**

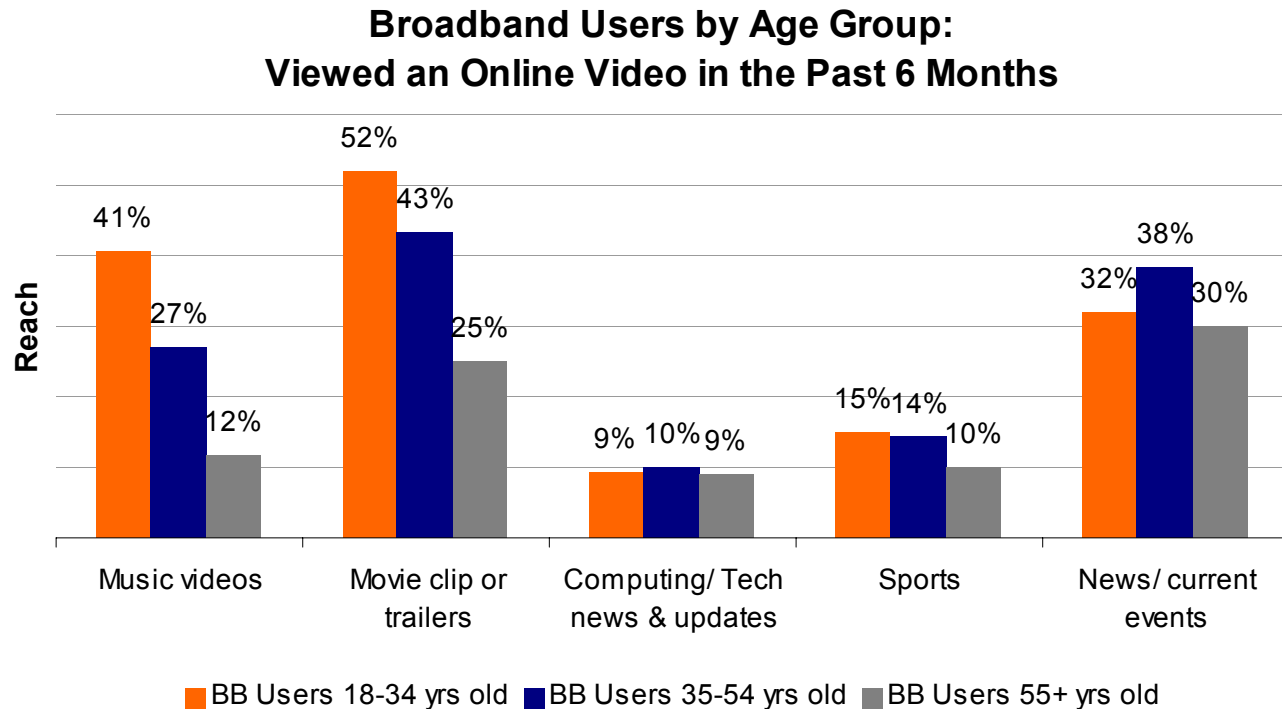


Source: comScore Media Metrix, Audience Insite Measures (AIM), Fall 2003

Internet connectivity from Home: "Broadband" includes Cable Modem, DSL, ISDN, or Satellite connection; "Dial-Up" includes Dial-up from phone line and "Don't know" responses

# Music Videos and Movie Clips Most Popular, followed by News

- We see that by far, Music Videos and Movie clips and trailers have the highest reach among 18-34 broadband users
- Although a substantial percentage of the 18-34 year old audience reported viewing news video online, they are still outpaced by 35-54 year olds



Source: comScore Media Metrix, Audience Insite Measures (AIM), Fall 2003

Internet connectivity from Home: "Broadband" includes Cable Modem, DSL, ISDN, or Satellite connection; "Dial-Up" includes Dial-up from phone line and "Don't know" responses