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Generational Media Study
– September 21, 2004 –

Conducted in partnership with

FRANK N. MAGID ASSOCIATES, INC.

RESEARCH • COUNSEL

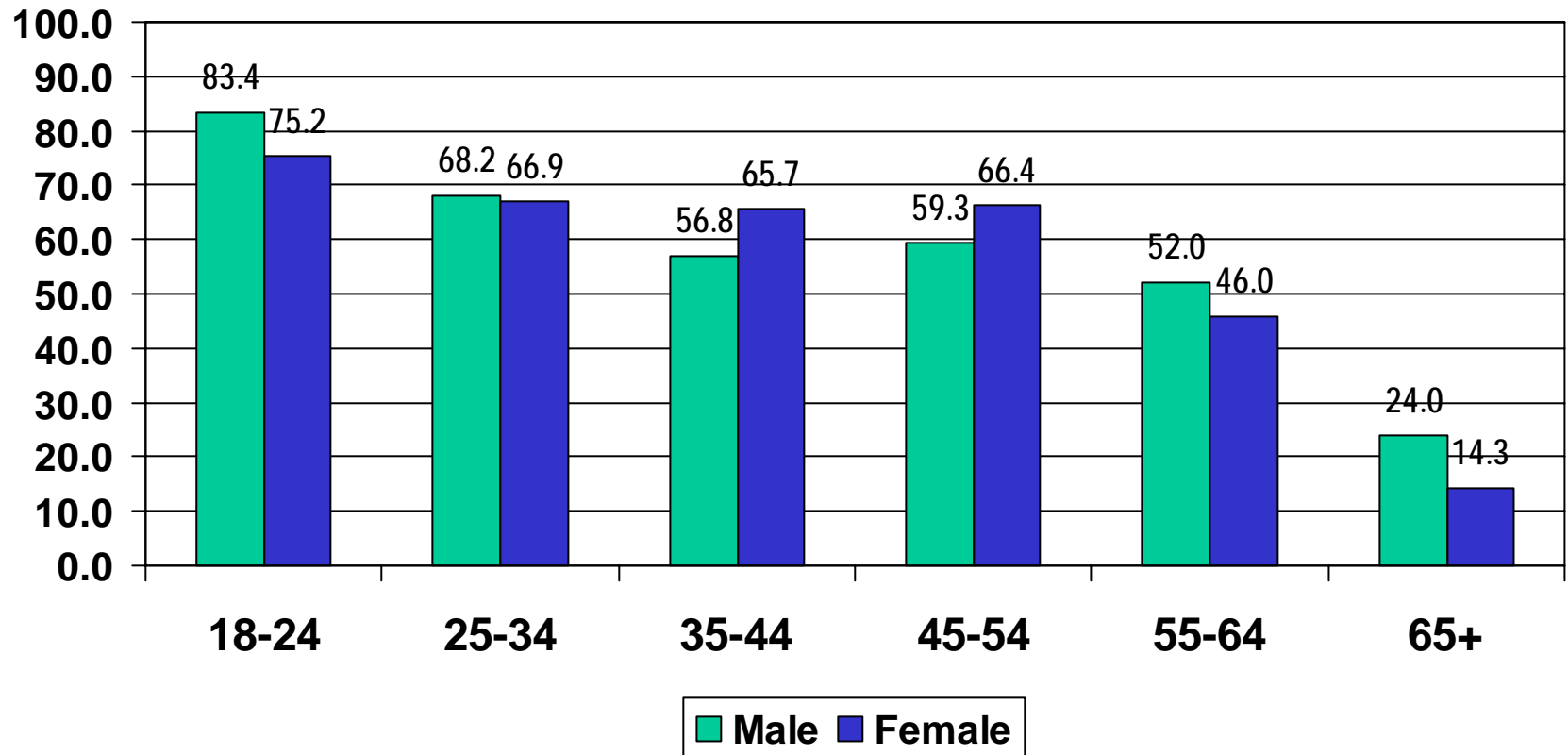
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Background: OPA 18-34 Year Old Research Series

- **18 to 34 Year Old: Behavioral Analysis – 3/29/04**
(in conjunction with comScore Networks)
- **Media Lifestyle of the 18 to 34 Year Old Consumer: Ethnographic Study – 4/20/04**
(conducted by John Carey, Greystone Communications)
- **The Broadband-Enabled 18 to 34 Year Old: Behavioral Analysis – 6/3/04**
(in conjunction with comScore Networks)

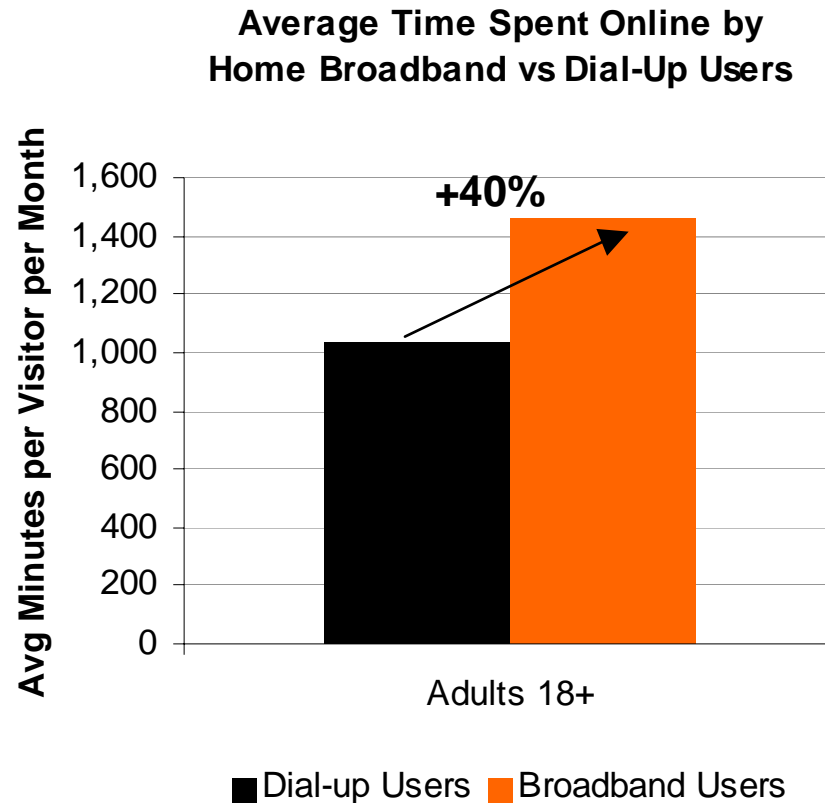
Internet Penetration By Age/Sex

83.4% of males 18-24 have Internet access



Source: comScore Media Metrix, US Census; as of July 2003

Adult Broadband Users Spend 40% More Time Online than Dial-up Users on a Monthly Basis

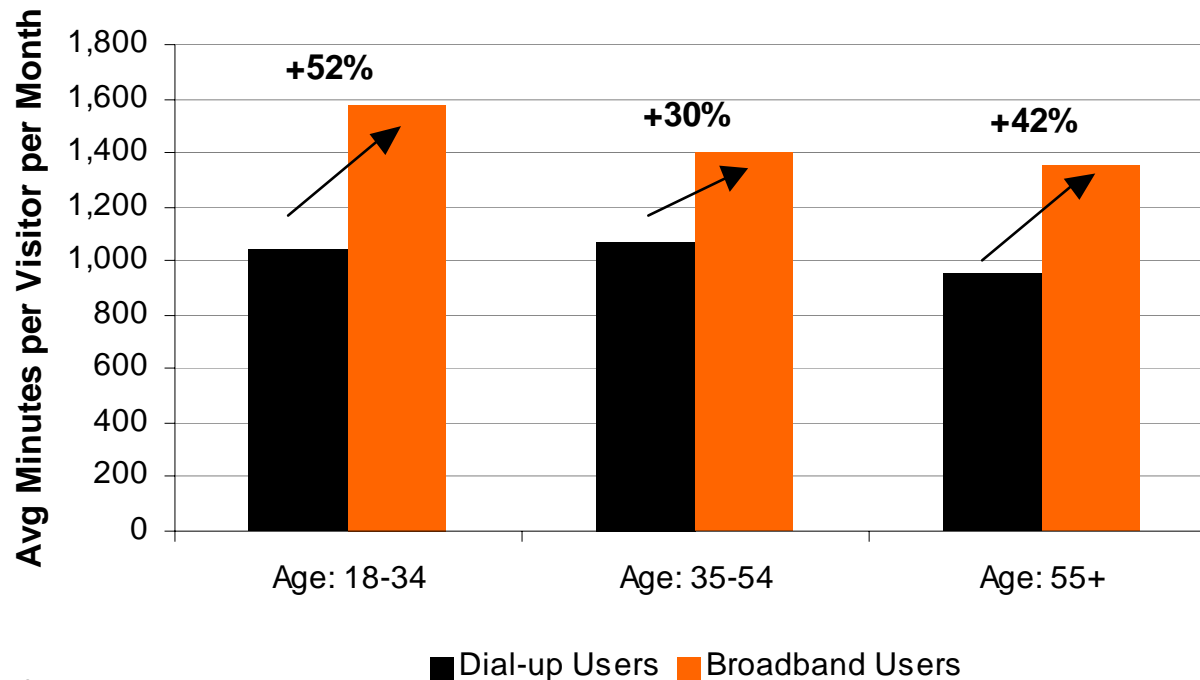


Source: MyMetrix October 2003, U.S. Home Audience

18-34s with BB Access Spend 52% More Time than Dial-up Peers

- 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



Source: MyMetrix October 2003



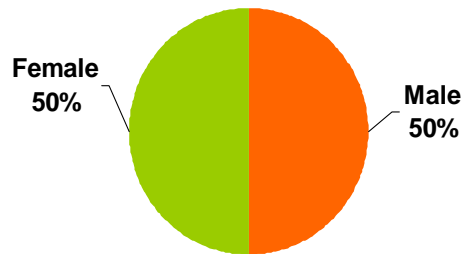


Generational Media Study: Methodology & Sample

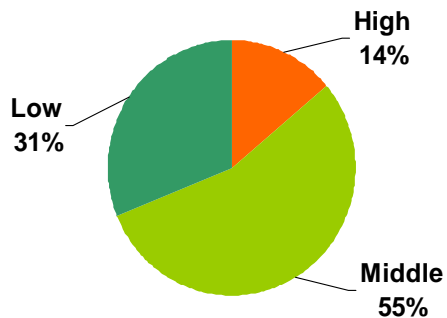
- National online survey of 1,235 respondents
- Sample (nationally representative gender distribution within age groups):
 - 18-24 years: N=410
 - 25-34 years: N=411
 - 35-54 years: N=414
- Recruiting method: Purchased list
- Field period: July 26 – 31, 2004
- Survey hosted at Frank N. Magid Associates' online division surveysonline.com
- Note: Weighting the overall data by age distribution does not change the findings significantly

Sample Demographics

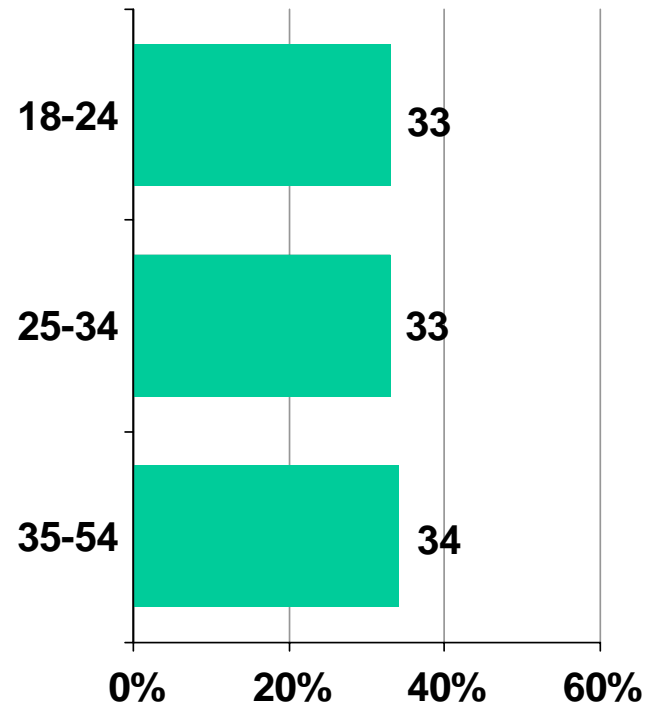
Gender



SES



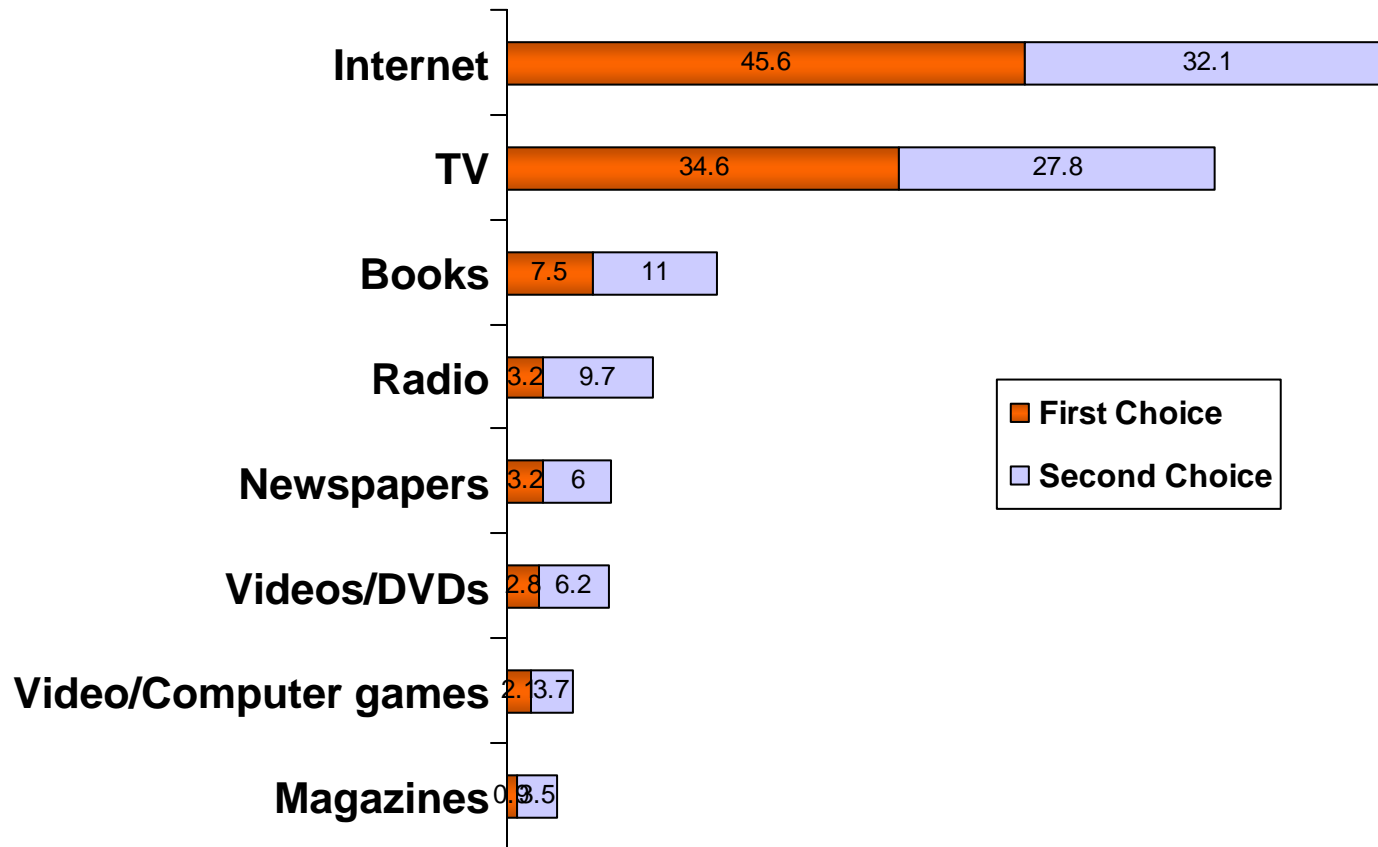
Age (Quota)



SES = Socio-Economic Status (based on income, education, occupation)

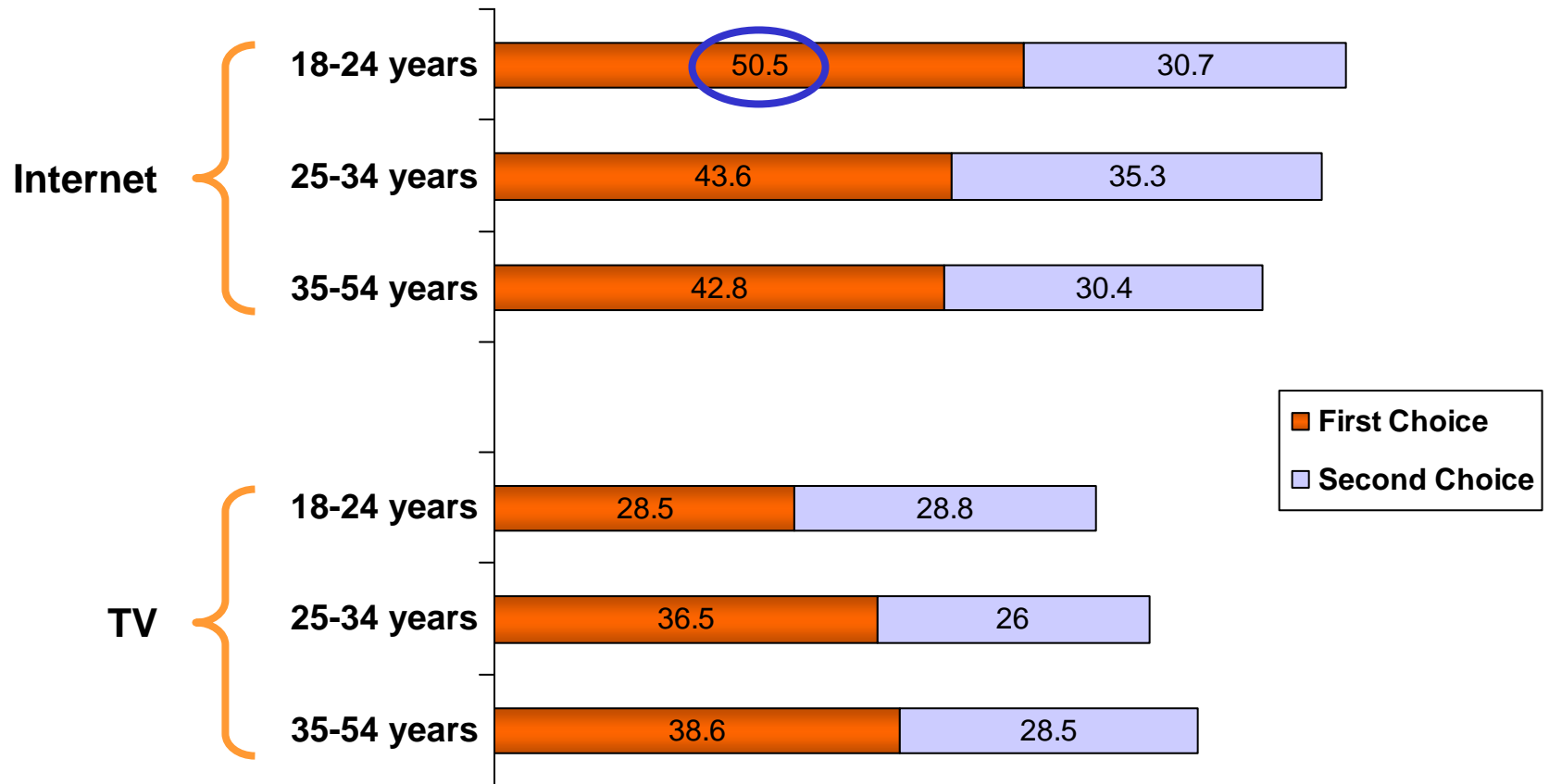
Choosing Media Sources

Internet & Television are the Top 2 Media of Choice



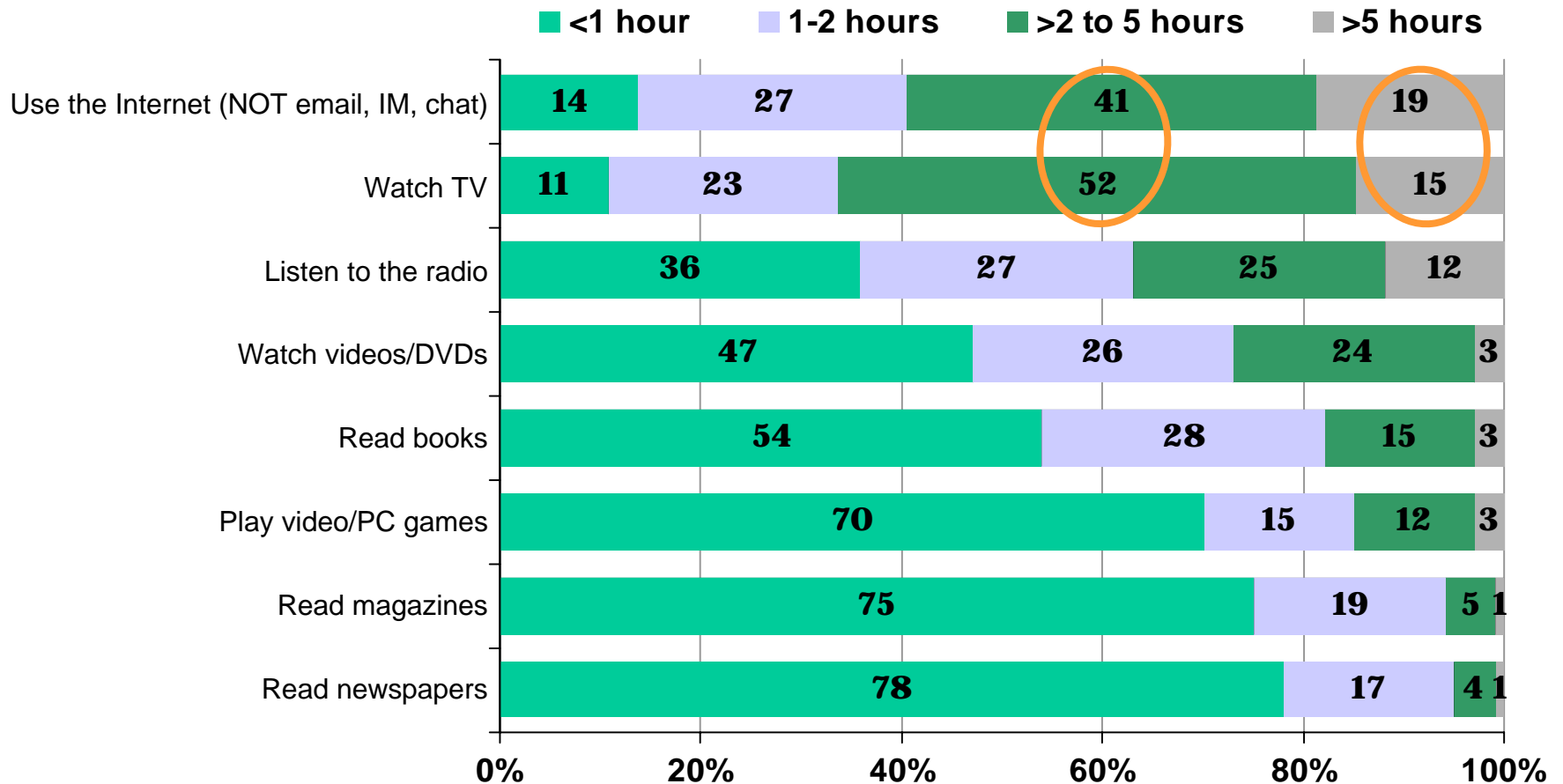
Q.30(A-H): If you could only use two media in your life, which two of the media listed below would you use?

For Those Age 18-24, the Internet is More Likely to Be Top Media Choice



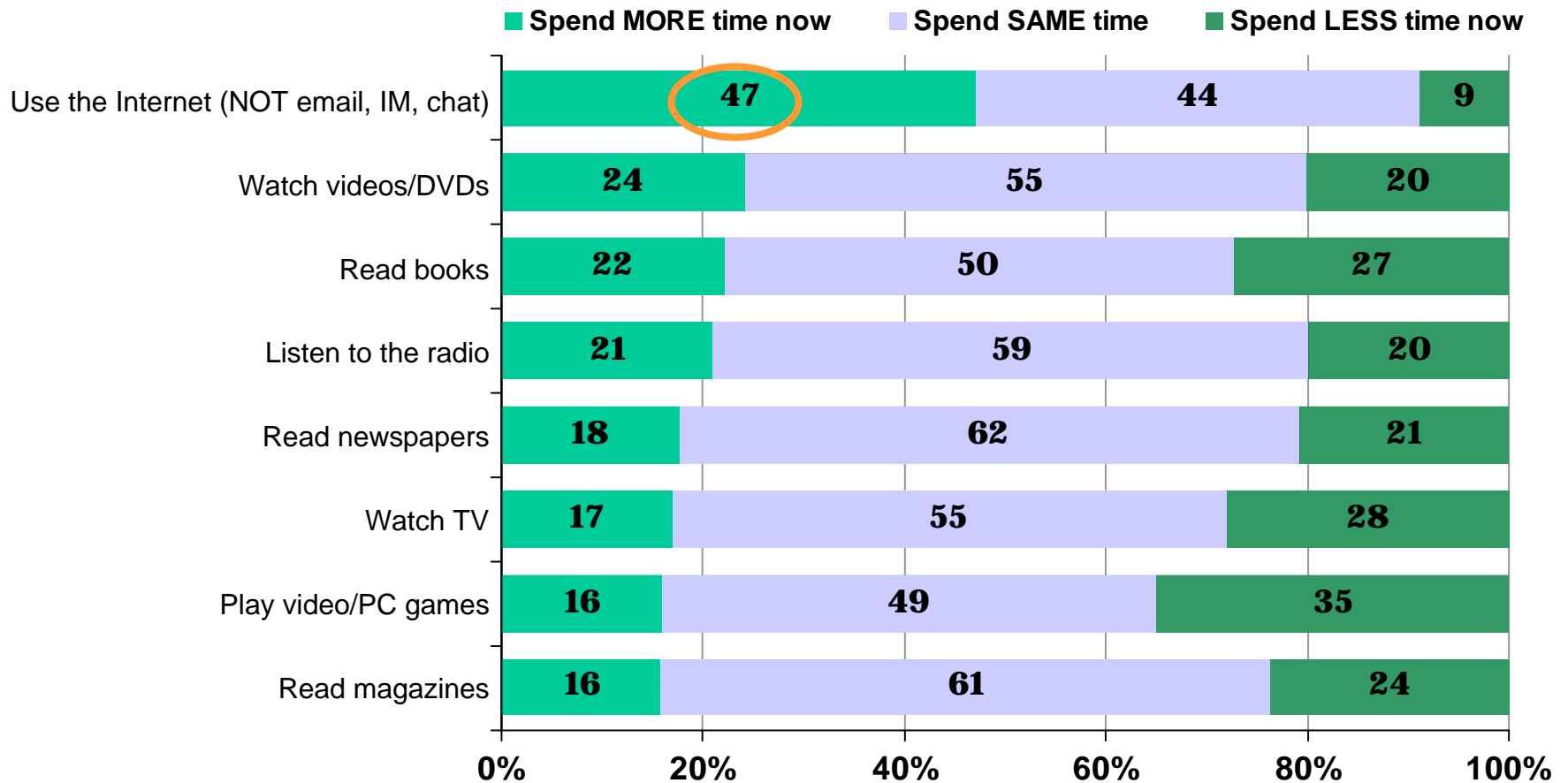
Q.30(A-H): If you could only use two media in your life, which two of the media listed below would you use?

Internet & TV are by Far the Most Frequently Used Media



Q.1: On a typical weekday, for how long do you ___ ?

Internet is the Only Medium with Net Growth in Perceived Time Spent



Q.4: For each of the following activities, please indicate how much time you spend on them now compared to one year ago.

Growth in Time Spent with Internet Happens Across All Age Groups

“I spend <u>MORE</u> time engaging in this activity now than one year ago”	18-24 years	25-34 years	35-54 years
Use the Internet (NOT email, IM, chat)	52%	44%	45%
Watch videos/DVDs	31	23	19
Read books	27	24	16
Listen to the radio	30	20	14
Read newspapers	26	17	10
Watch TV	22	15	14
Play video/PC games	23	14	11
Read magazines	20	19	9

Q.1: On a typical weekday, for how long do you ___ ?

Attitudes Towards Media

Internet Provides Information, TV More for Entertainment & Relaxation

Attitudes (Top 2 Box agreement)	Internet	TV	News papers	Magazines
I watch/use/read it for entertainment	74%	86%	29%	62%
Helps me keep up with topics I am interested in	73	41	35	48
Is an important part of my day	73	39	27	11
Programs/articles/content provides me with useful info about products and services	65	30	29	40
Is an important way for me to relax	50	65	24	39
I trust the news I get there	43	45	43	26
Is my most important source of news	41	41	24	6

Q.11/12/13/15: Please think about your TV viewing/newspaper reading/Internet usage/magazine reading habits and indicate how much you agree or disagree with each of the following statements. (5-point agree-disagree scale) BASE: Those who use these media.

All Age Groups Have Similar Attitudes Towards the Internet...

Attitudes towards the Internet (Top 2 Box agreement) BASE: Internet users	18-24 years	25-34 years	35-54 years
I use the Internet for entertainment	77%	74%	72%
The Internet helps me keep up with topics I am interested in	74	75	70
Using the Internet is an important part of my day	74	74	71
Content on the Internet provides me with useful info about products and services	60	67	67
Using the Internet is an important way for me to relax	49	48	52
The Internet is my most important source of news	45	43	35
I trust the news I get on the Internet	43	44	40

Q.13: Please think about how you use the Internet and indicate how much you agree or disagree with each of the following statements. (5-point agree-disagree scale) BASE: Those who use the Internet.

...As Well As Similar Attitudes Towards TV

Attitudes towards TV (Top 2 Box agreement) BASE: TV viewers	18-24 years	25-34 years	35-54 years
I watch TV for entertainment	84%	88%	87%
Watching TV is an important way for me to relax	62	66	68
I trust the news I get on TV	48	47	39
TV helps me keep up with topics I am interested in	41	40	42
Watching TV is an important part of my day	39	38	40
TV is my most important source of news	39	39	45
TV programs provide me with useful info about products and services	32	26	33

Q.11: Please think about your TV viewing habits and indicate how much you agree or disagree with each of the following statements. (5-point agree-disagree scale) BASE: Those who watch TV.

Importance of Newspapers Differs by Age Group

Attitudes towards Newspapers (Top 2 Box agreement) BASE: Newspaper readers	18-24 years	25-34 years	35-54 years
I trust the news I get in newspapers	50%	45%	35%
Newspapers help me keep up with topics I am interested in	33	32	40
I read newspapers for entertainment	28	25	33
Newspaper articles provide me with useful info about products and services	24	30	33
Newspapers are my most important source of news	22	23	26
Reading the newspaper is an important way for me to relax	20	22	28
Reading the newspaper is an important part of my day	17	25	38

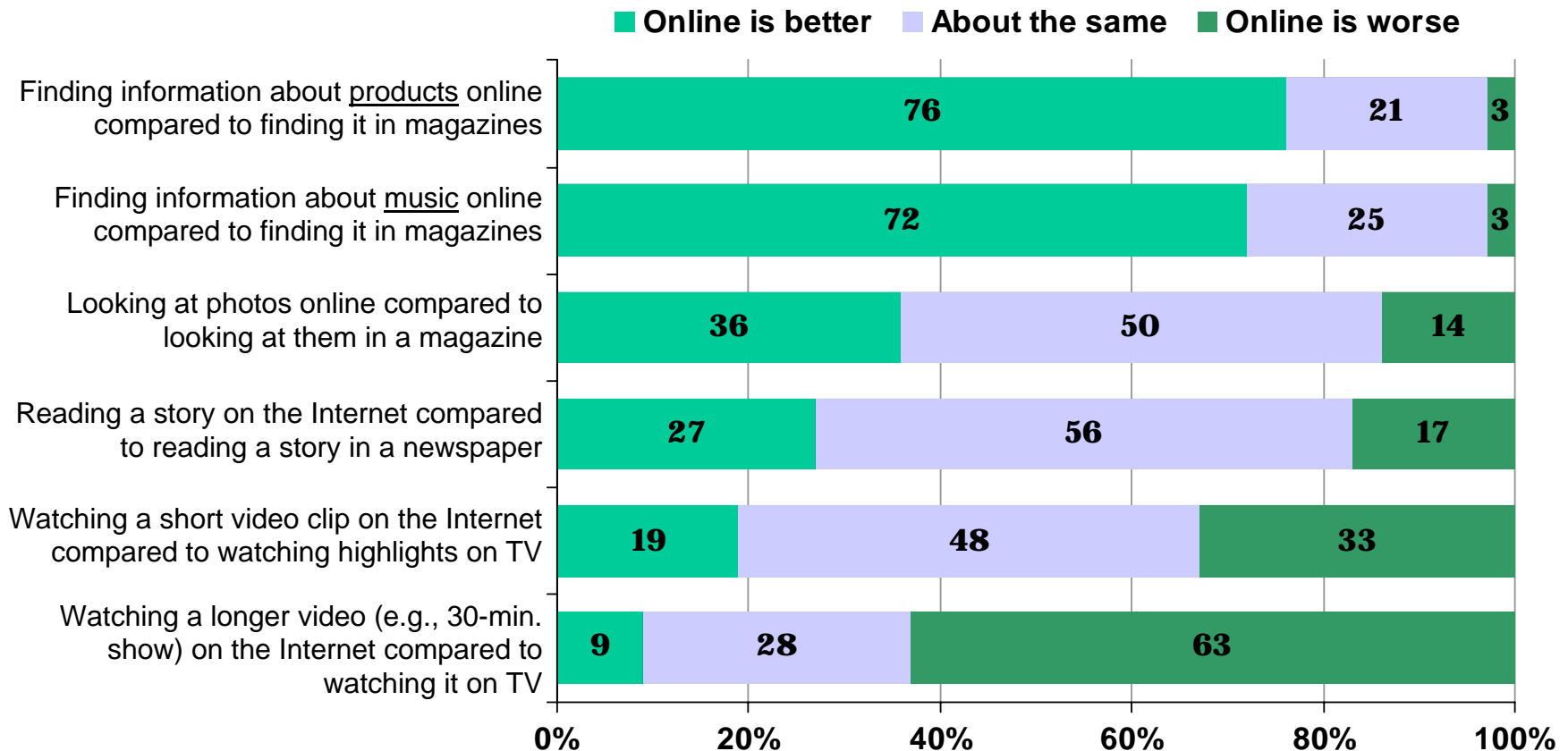
Q.12: Please think about your newspaper reading habits and indicate how much you agree or disagree with each of the following statements. (5-point agree-disagree scale) BASE: Those who read newspapers.

Magazine Attitudes Show Least Differences by Age

Attitudes towards Magazine (Top 2 Box agreement) BASE: Magazine readers	18-24 years	25-34 years	35-54 years
I read magazines for entertainment	65%	66%	56%
Magazines help me keep up with topics I am interested in	48	52	43
Reading magazines is an important way for me to relax	40	40	37
Magazine articles provide me with useful info about products and services	38	43	39
I trust the news I get in magazines	26	25	27
Reading magazines is an important part of my day	10	11	10
Magazines are my most important source of news	7	6	6

Q.15: Please think about your magazine reading habits and indicate how much you agree or disagree with each of the following statements. (5-point agree-disagree scale) BASE: Those who read magazines.

Internet Media Rates Highly in Head-to-Head Comparison with Offline Media



Q. 31(A-J): Please compare your use of the Internet to other media. For each of the following activities, indicate whether doing them on the Internet is a better experience, about the same experience, or a worse experience than doing them offline. BASE: Those who engage in these activities.

...This is True for All Age Groups

Internet/online is <u>better/same experience</u>	18-24 years	25-34 years	35-54 years
Finding information about <u>products</u> online compared to finding it in magazines	97%	97%	96%
Finding information about <u>music</u> online compared to finding it in magazines	97	97	97
Looking at photos online compared to looking at them in a magazine	85	87	87
Reading a story on the Internet compared to reading a story in a newspaper	85	83	81
Watching a short video clip on the Internet compared to watching highlights on TV	69	64	69
Watching a longer video (e.g., 30-min. show) on the Internet compared to watching it on TV	40	31	41

Q. 31(A-J): Please compare your use of the Internet to other media. For each of the following activities, indicate whether doing them on the Internet is a better experience, about the same experience, or a worse experience than doing them offline. BASE: Those who engage in these activities.

Media Preferences

Internet Predominates for Information and for Fun

Which medium would you turn to FIRST if you wanted to...	Internet	TV	News papers	Mags	Radio
Find information about a product you are interested in	96%	2%	1%	2%	0%
Get information about computers or other technology products	89	2	1	7	0
Get information about your hobbies and interests	88	2	1	8	0
Find information about your favorite music/recording artists	84	4	1	6	6
Get information about the latest PC/video games	80	5	1	14	1
Get the latest stock quotes or financial information	72	10	17	0	1
Find entertainment information (movies, concerts, TV, events)	68	10	19	1	2
Have fun	59	30	2	2	6

...While TV is the First Source for News & Entertainment/Relaxation

Which medium would you turn to FIRST if you wanted to...	Internet	TV	News papers	Mags	Radio
Kill time	56%	35%	2%	5%	4%
Check the weather	54	40	3	0	3
Get sports scores/stories	49	31	17	1	3
Get national news	39	51	8	0	2
Get breaking news	33	61	2	0	4
Get away from some stressful event	31	41	2	9	18
Be entertained	22	72	0	2	5
Relax	18	52	3	10	17
Get local news	14	66	15	0	4

All Age Groups Would Turn to the Internet First for Information...

I would turn to the <u>Internet first</u> if I wanted to...	18-24 years	25-34 years	35-54 years
Find information about a product you are interested in	96%	97%	94%
Get information about computers or other technology products	92	89	86
Get information about your hobbies and interests	89	89	85
Find information about your favorite music/recording artists	87	83	81
Get information about the latest PC/video games	79	83	77
Get the latest stock quotes or financial information	71	75	69
Find entertainment information (movies, concerts, TV, events)	76	69	60

...And the Internet is a More Important Source of News for Young People

I would turn to the <u>Internet first</u> if I wanted to...	18-24 years	25-34 years	35-54 years
Check the weather	58	55	49
Get sports scores/stories	51	56	41
Get national news	45	44	29
Get breaking news	36	37	27
Get local news	15	18	10

2 of 2

Q.10 Imagine you had access to various media at the same time. Which medium would you turn to first if you wanted to...? (Forced Choice)

Key Findings

- In head-to-head comparison of qualitative attributes the Internet ranks strongly compared to offline media
- No other media compares to the Internet when it comes to Information and Fun
- Few generational differences exist when it comes to behaviors and attitudes
- Young people show clear preference for using Internet as primary source for news

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