



Topline Summary Media Consumption Study

conducted in
partnership with



**Millward Brown
IntelliQuest**

Definition of Research Segments

The findings of this research are centered around two segments:

At Work Internet Users

Made up of users who indicated they had accessed the Internet from work in the past 30 days (of whom 87% accessed from work in the past week, and 79% accessed from work yesterday).

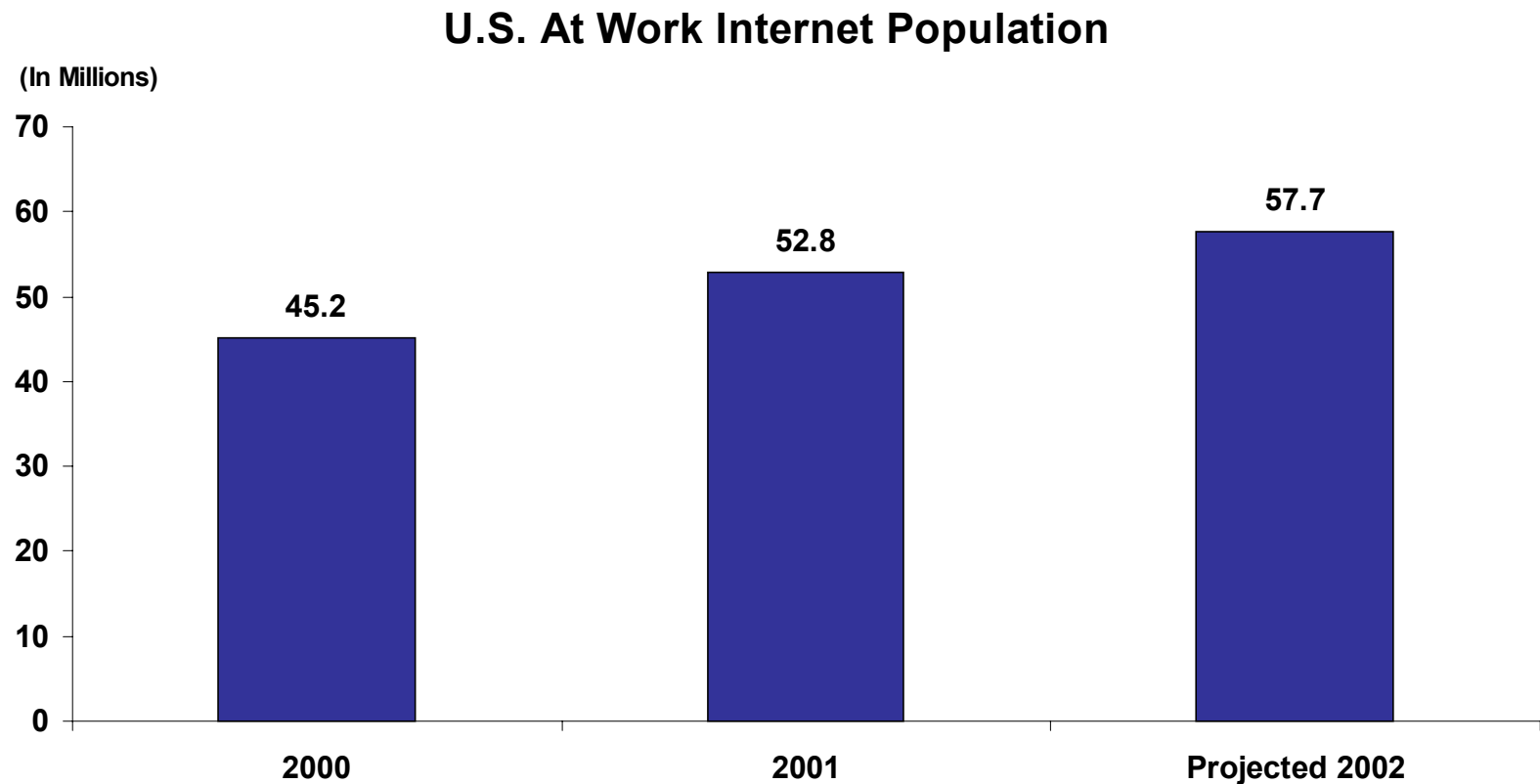
Non-Work Internet Users

Made up of users who indicated they had accessed the Internet from any location (home, school or elsewhere) other than work in the past 30 days.

Headlines

- At Work users are a significant proportion of the total US online population, numbering 52.8 million in 2001, according to Jupiter Media Metrix
- This population is a desirable media target
 - ↳ Young, high income, high education
- Those who use the Internet at work believe that it makes them more productive and helps them balance their personal and professional lives
- Most At Work users also log on from home
- Total online media consumption EXCEEDS total TV consumption among this audience during the week
- Daytime on the Internet is prime time for this audience
- Their attitudes toward Internet advertising are positive relative to other media
 - ↳ Online is considered particularly appropriate for product information and purchase decisions

U.S. At Work Users numbered 52.8mm in 2001 (Source: Jupiter Media Metrix)



Demographics

At Work Users are a desirable young, well-educated demographic

At Work Internet Users are significantly more likely to be age 18-34 and to have higher education than Non-Work users.

	At Work	Non-Work
	%	%
	A	B
Male	45	49
Female	55	51
18-34	45 B	26
35+	55	74 A
Bachelors degree or higher	71 B	50
Base:	(755)	(272)

At Work Users have both personal and business spending power

At Work Internet Users have a significantly higher household income and are much more likely to authorize company spending than Non-Work Users.

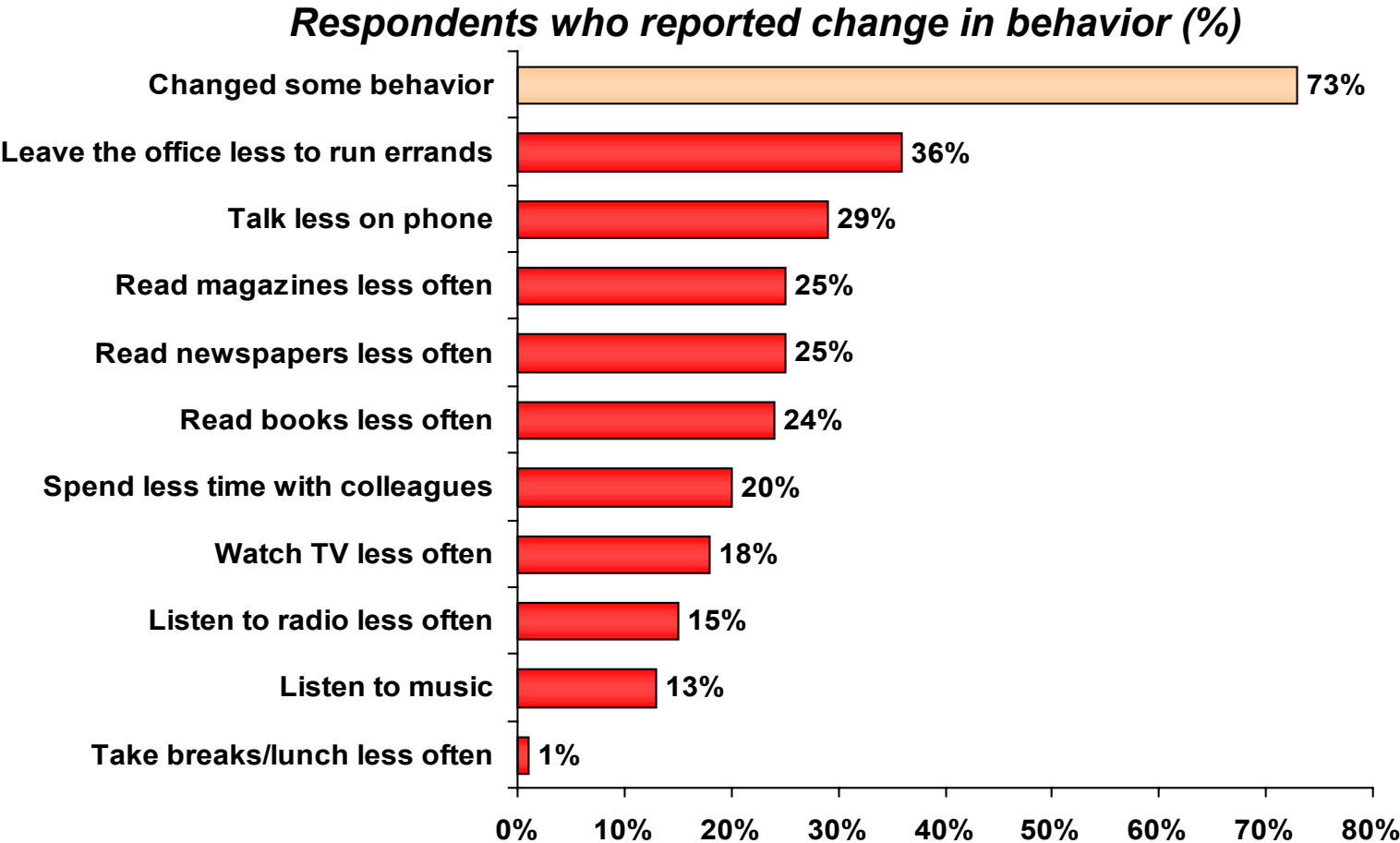
	At Work	Non-Work
	%	%
	A	B
Household Grocery Shopper	80	87 A
Major household purchase	96	94
HH income \$75k plus	45 B	22
Authorize company spending	53 B	25
Base:	(755)	(272)

Q. Do you do at least half the grocery shopping for your household?
Q. Do you have at least half of the say in major household purchases (e.g. cars, computers)?
AB = Significantly different at the 95% confidence level.
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Behavioral Characteristics

The Internet has fundamentally changed workplace behavior

The Internet has reduced the frequency of many non-work distractions during the work day, in particular the running of errands and phone calls.



Q. 11: Which of the following do you do less often while you are at work as a result of using the Internet?

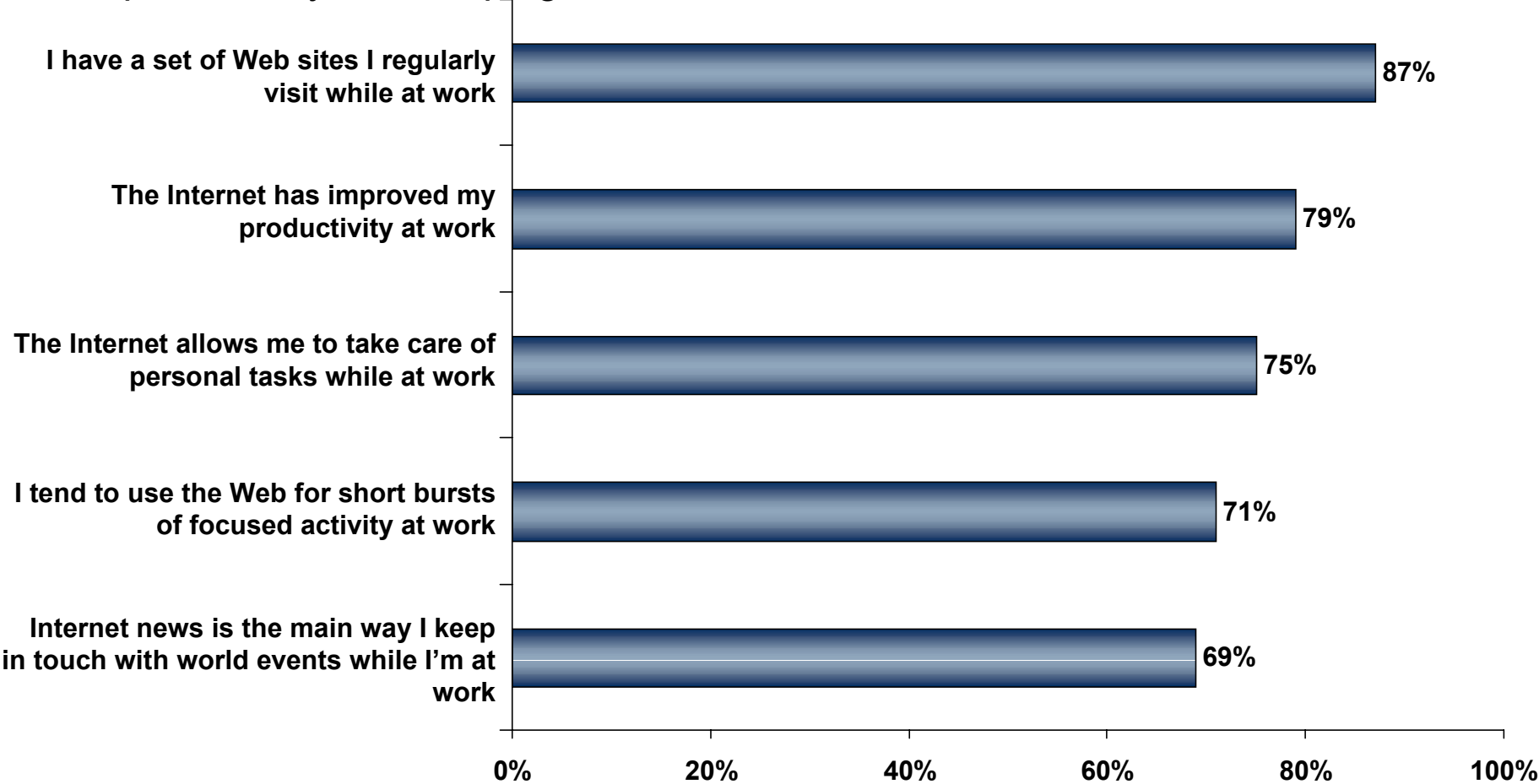
Base: At Work (755)

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Attitudes toward the Internet

(Top 2 Box Scores)

The Internet has become ingrained in the workday routine, increasing productivity and keeping workers informed.



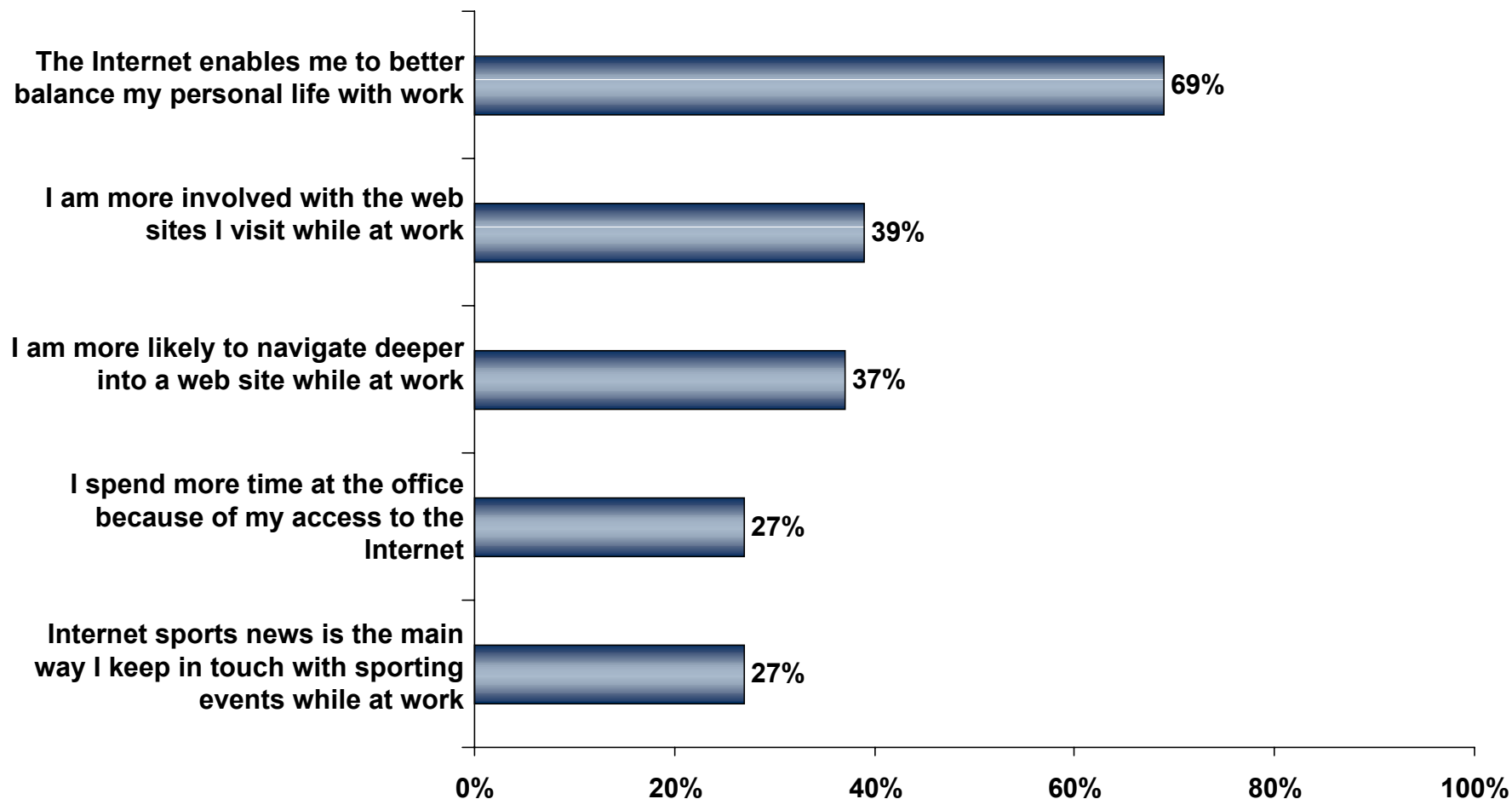
Q. 10: Please indicate your agreement with the following statements related to your use of the Internet while at work.

Base: At Work (755)

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Attitudes toward the Internet (cont.)

(Top 2 Box Scores)



Q. 10: Please indicate your agreement with the following statements related to your use of the Internet while at work.

Base: At Work (755)

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At Work Users are most likely to visit news sites

Compared to Non-Work Users, they are more likely to visit retail, financial, computer/software and travel related sites.

Sites Used In A Typical 7-Day Week

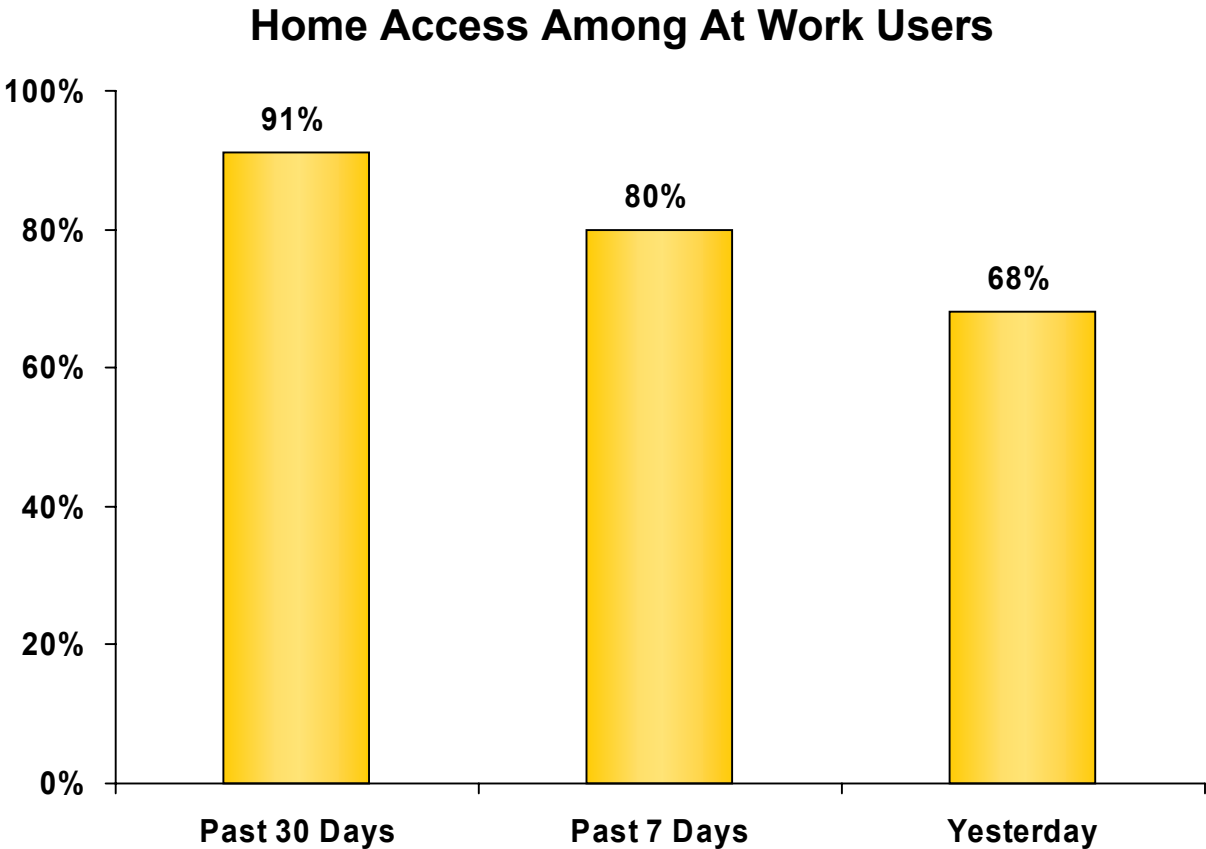
	At Work	Non		At Work	Non
	%	%		%	%
	A	B		A	B
News	57	55	Sports	27	23
Retail Shopping	45 B	34	Health/Fitness	26	24
Financial Services	44 B	34	Job Listings	24	20
Computer/Software	43 B	33	Home Improvement	16	18
Special Interests/Hobbies	42	44	Music Only	16 B	10
Games	39	45	Radio Stations	16 B	10
Educational	33	32	Popular Culture	14	10
Travel Related	33 B	23	Automobile	11	10
Food/Cooking	31	36	Parenting/Babies	11	11
Base:	(755)	(272)	Base:	(755)	(272)

Q. 3: Which types of web sites do you typically visit in an average 7-day week?

Media Consumption

Most At Work Users also access from home

At Work Users are “multi-connectors;” 91% of them also log on to the Internet from home over the course of a month.



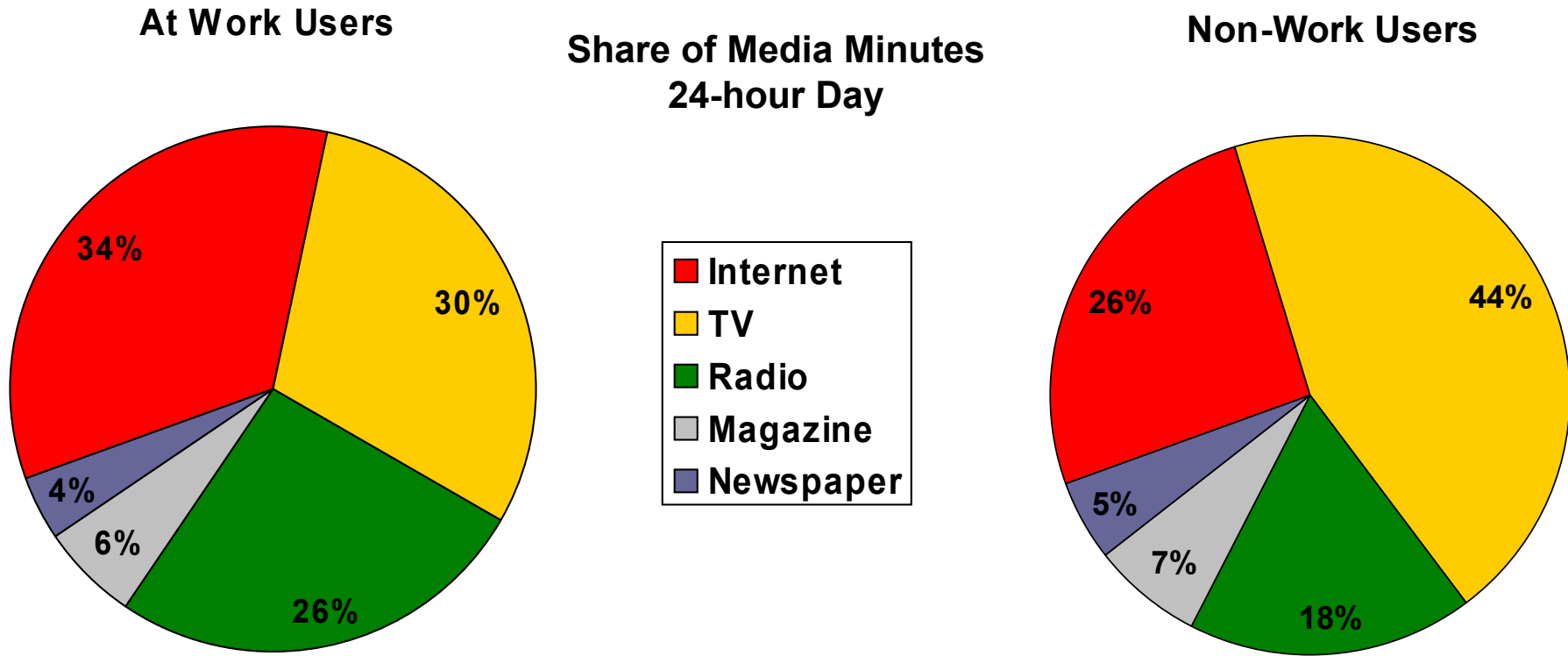
*From which of these locations did you access the Internet in the past 30 days? And in the past week?
Did you access the Internet yesterday from home, work or elsewhere for non-email purposes?*

Base: At Work (755)

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Weekday Internet consumption exceeds all other media for At Work Users

Among At Work Users, the Internet is their primary weekday medium in terms of total minutes consumed. It is still a strong secondary medium among Non-Work Users.



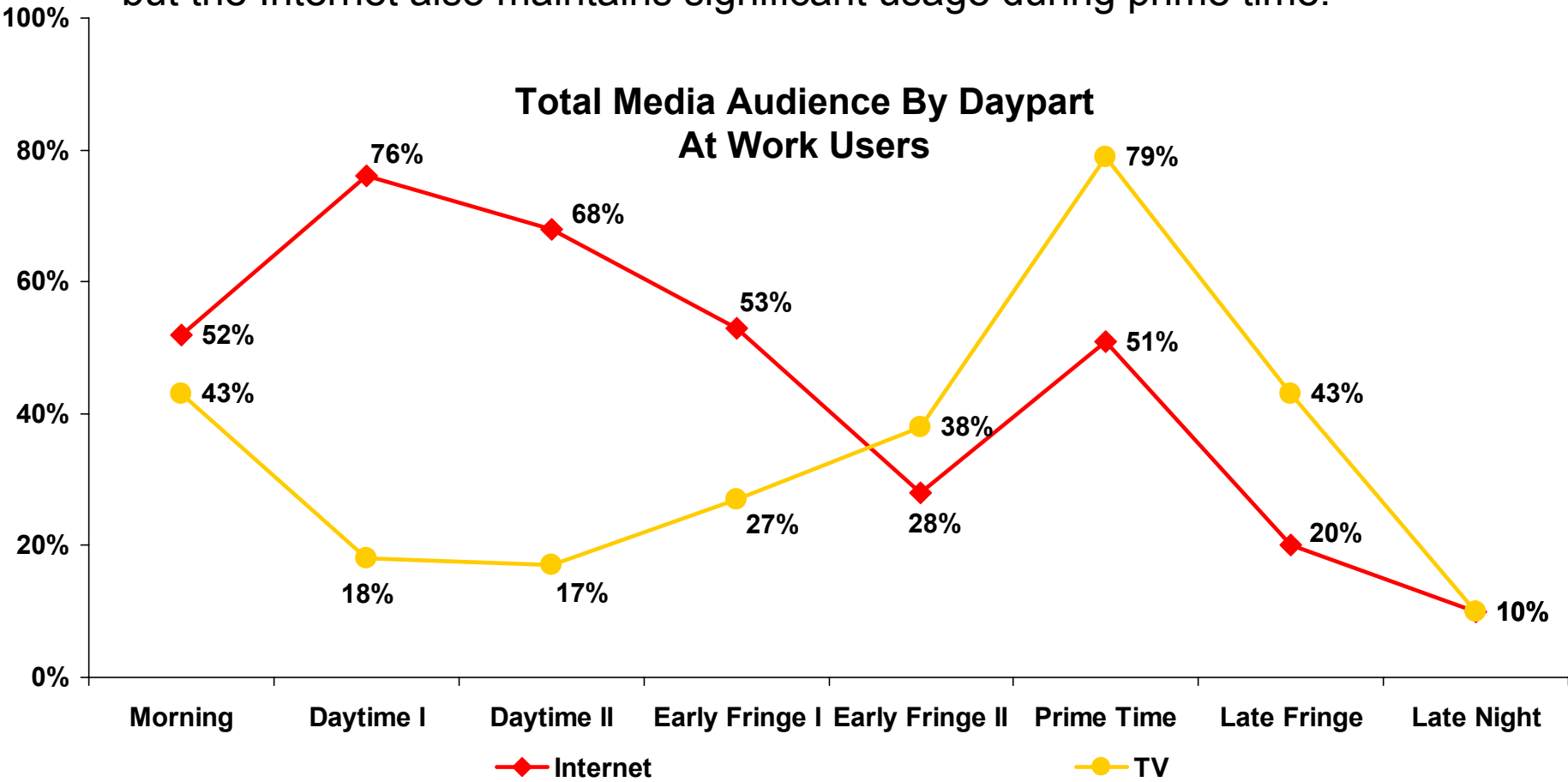
How much time did you spend yesterday on the following? (asked by daypart for accuracy - see appendix for details)

Base: At Work (755), Non-Work (272)

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Daytime on the Internet is prime time for At Work Users

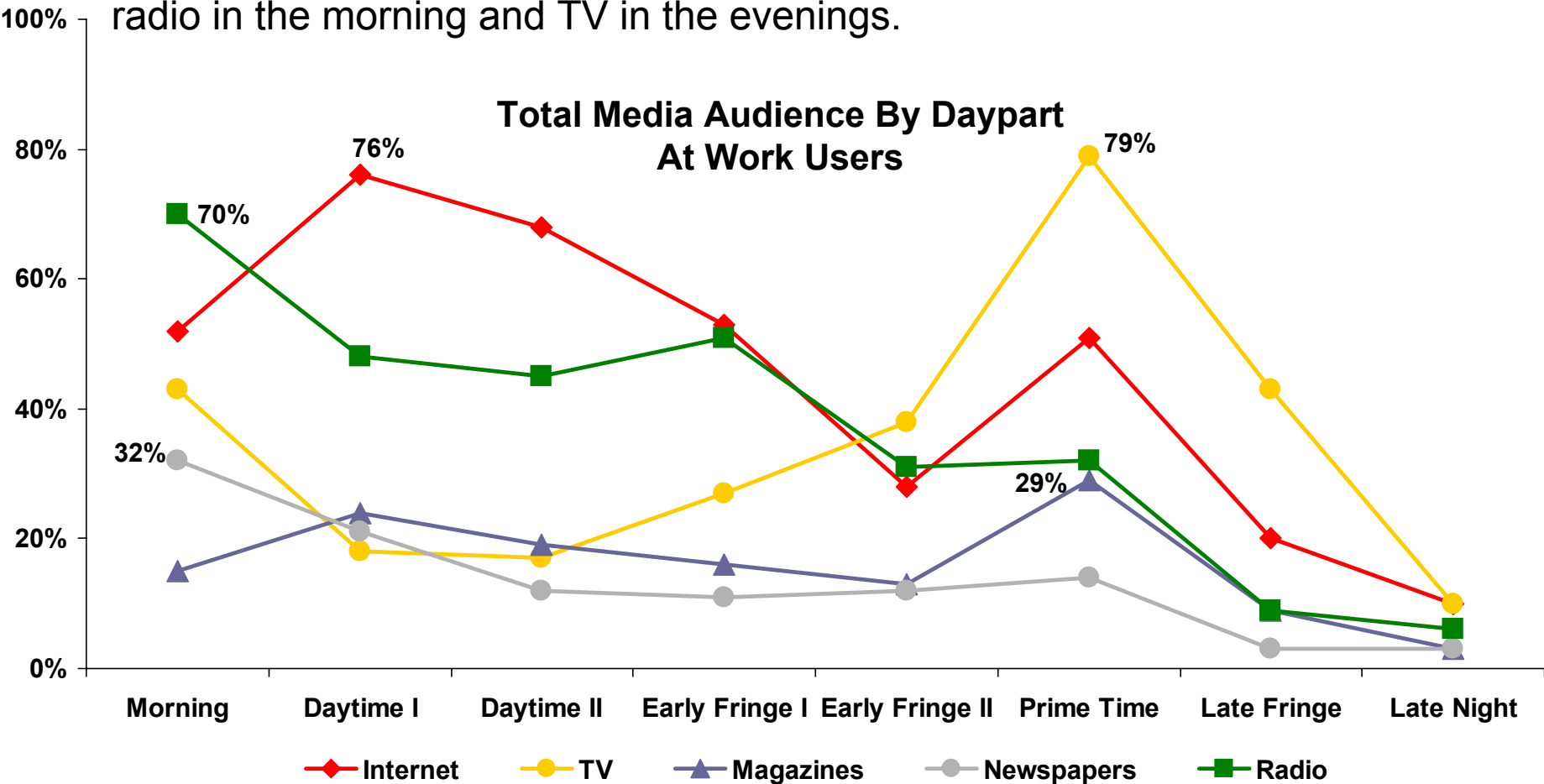
The Internet audience peaks during the day, as TV peaks during prime time, but the Internet also maintains significant usage during prime time.



How much time did you spend on the following <media> yesterday between <daypart>?
Base: At Work (755)
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Internet audience exceeds radio, newspapers and print virtually all day

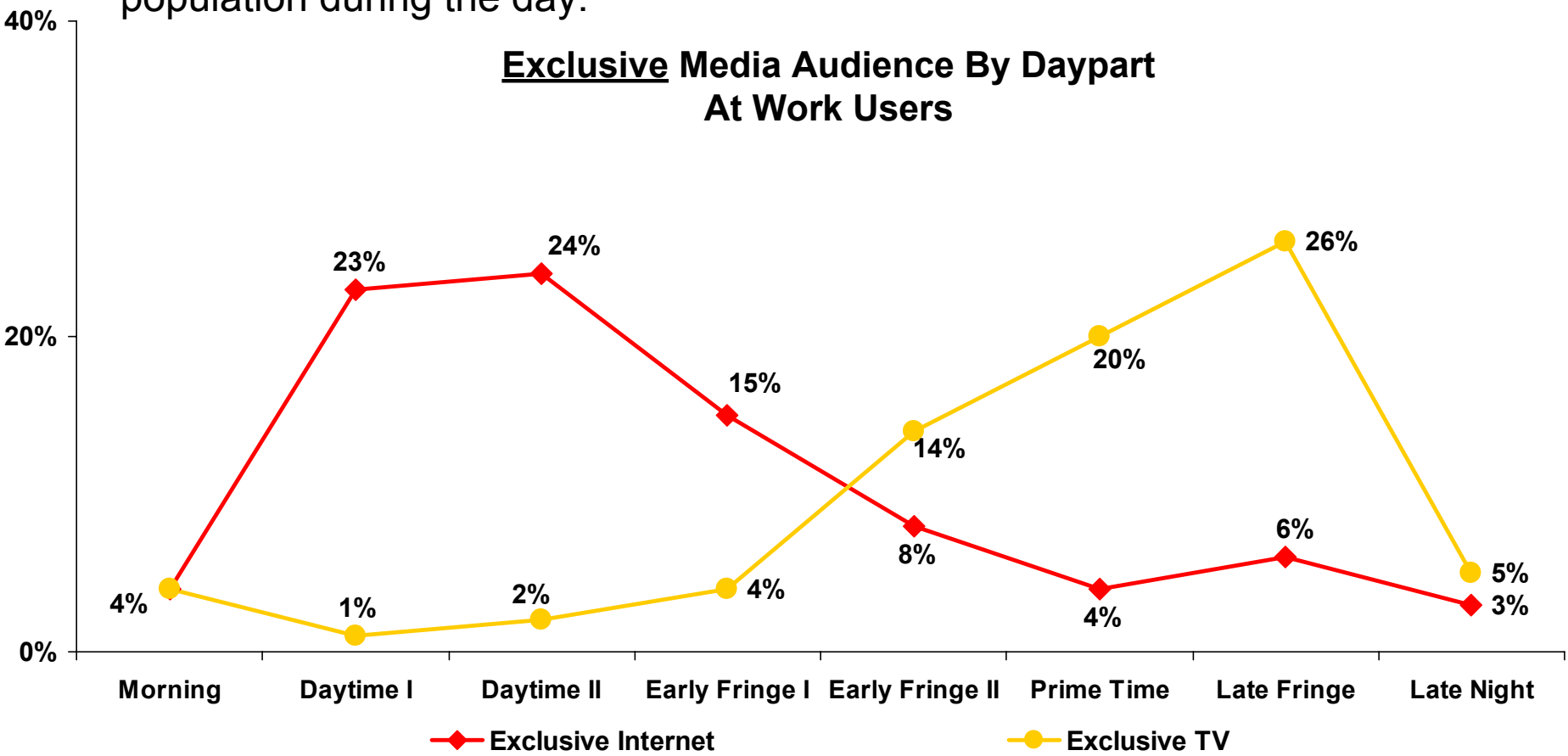
Among At Work Users, the only media peaks that exceed Internet usage are radio in the morning and TV in the evenings.



How much time did you spend on the following <media> yesterday between <daypart>?
Base: At Work (755)
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The Internet faces little competition during its prime dayparts

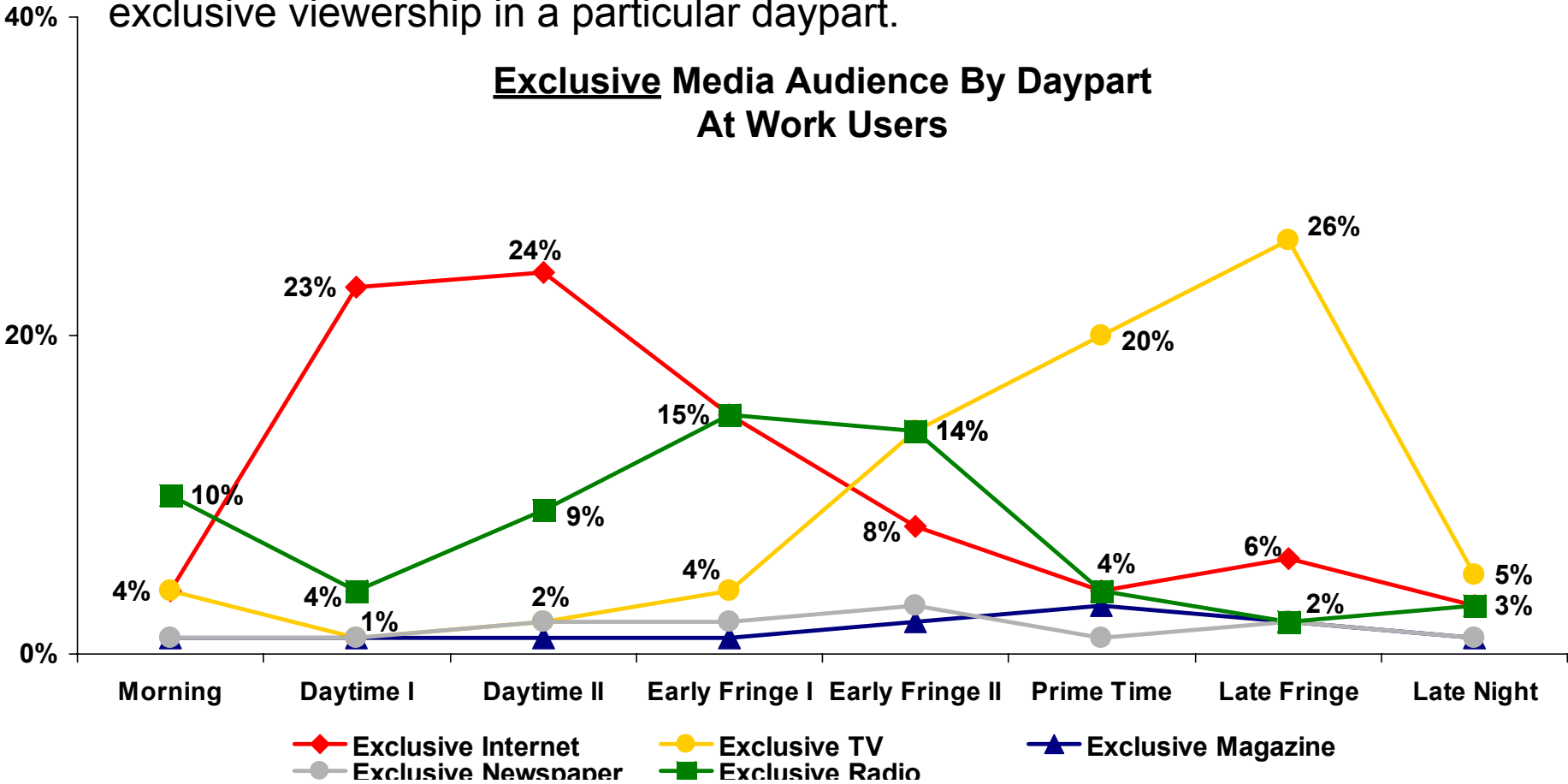
The Internet is the only way to reach around a quarter of the At Work population during the day.



How much time did you spend on the following <media> yesterday between <daypart>?
Base: At Work (755)
Exclusive Consumption is the only media consumed within a particular daypart
Any use of data contained in these slides must be appropriately sourced Online Publishers Association / MBIQ Media Consumption Study, November 2001.

The Internet faces little competition during its prime dayparts (cont.)

No media other than evening TV comes close to the Internet's peak level of exclusive viewership in a particular daypart.

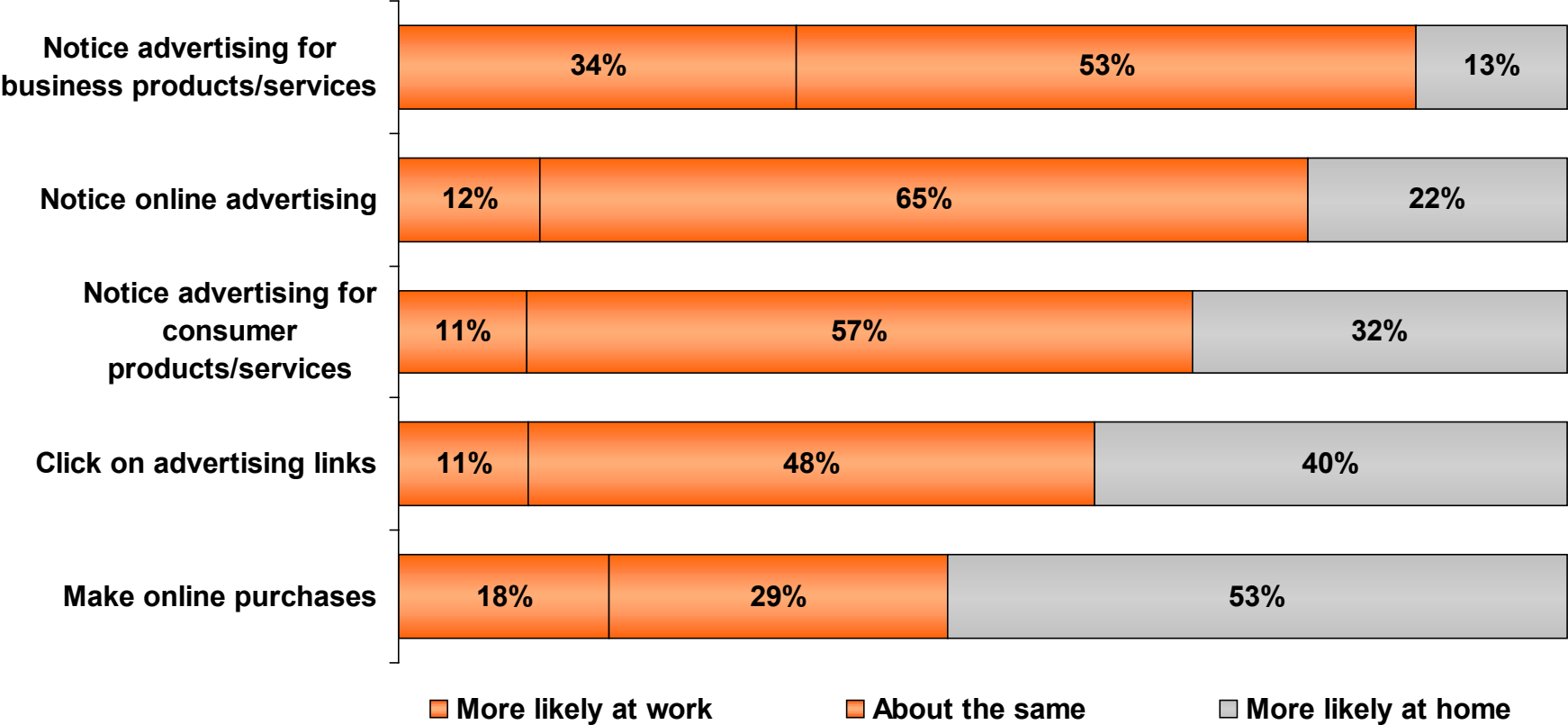


How much time did you spend on the following <media> yesterday between <daypart>?
Base: At Work (755)
Exclusive Consumption is the only media consumed within a particular daypart
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Attitudes Toward Online Advertising

Online ads are equally noticed at work and at home

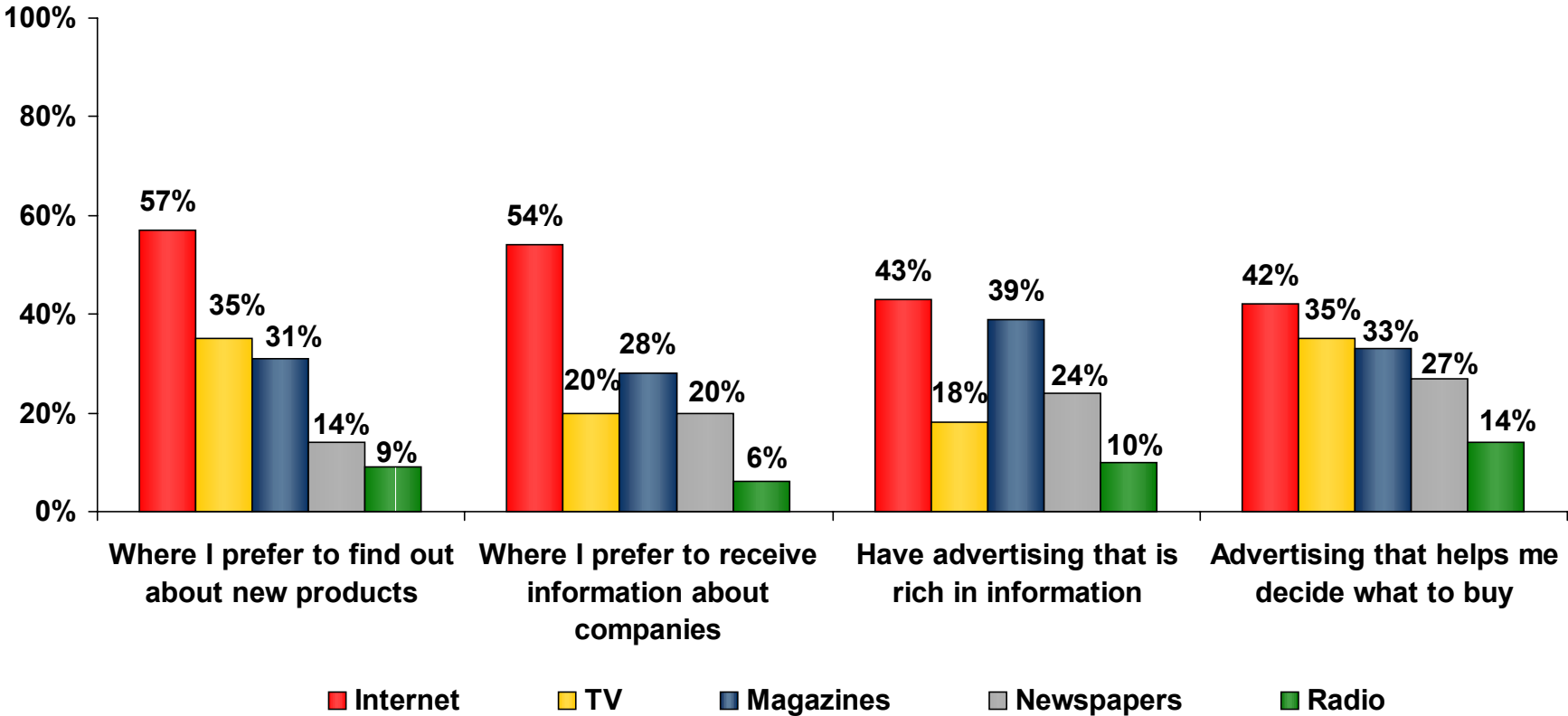
Direct response and transactional behavior is more likely to take place at home.



Q. 14: Thinking about your typical use of the Internet at work and home, where are you most likely to do the following?
Base: At Work and At Home Users (648)
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At Work Users believe Internet advertising has unique values...

The Internet is considered the leading medium for learning about new products, receiving information about companies, and for decision-focused, information-rich communications.



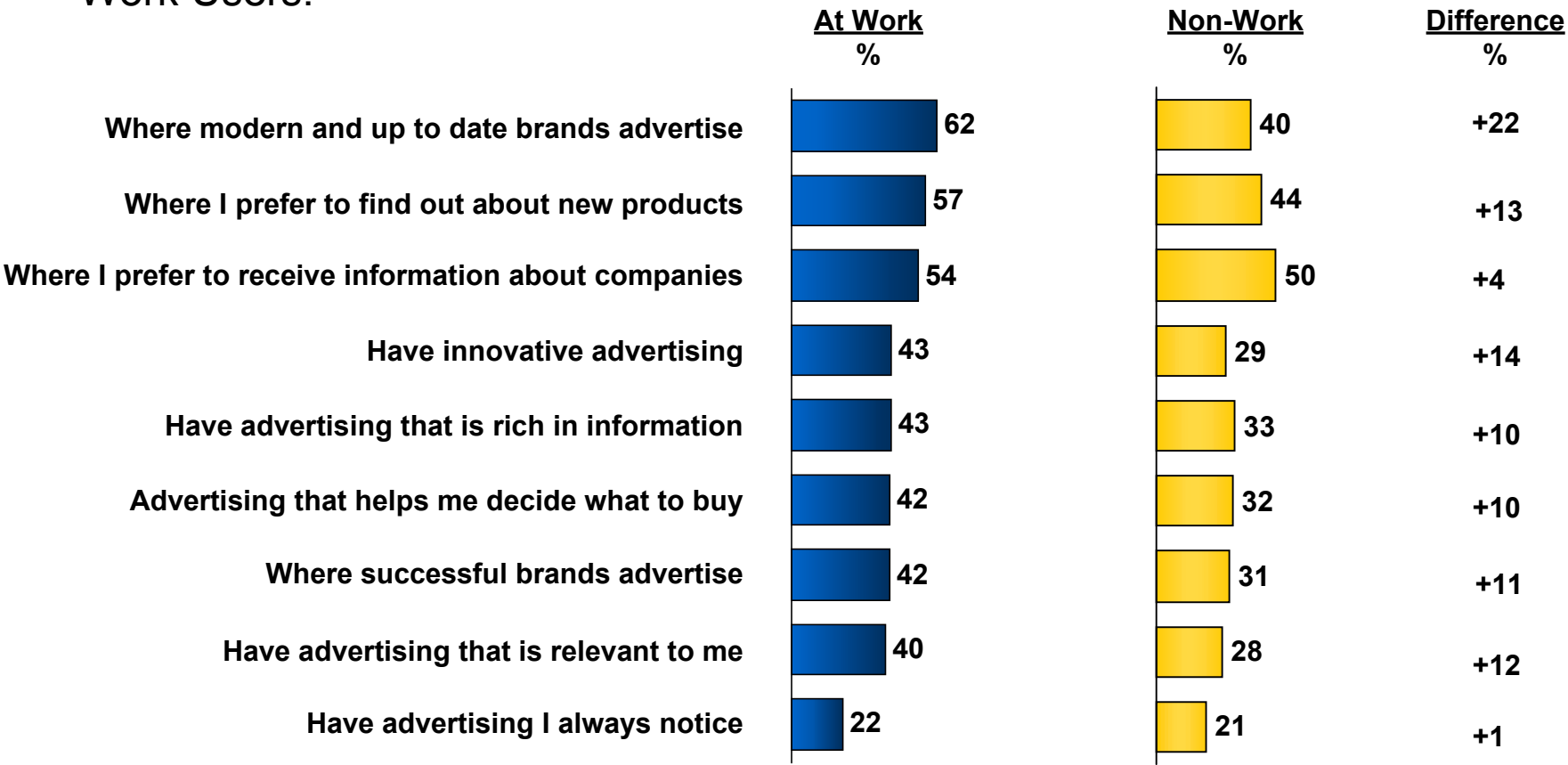
Q. 12: Please give your impressions of advertising you see on each of the following media. For each statement, please select all the different types of media which you think apply.

Base: At Work (755)

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...and feel favorably toward Internet advertising in general...

Attitudes toward Internet advertising are generally more positive among At Work Users.



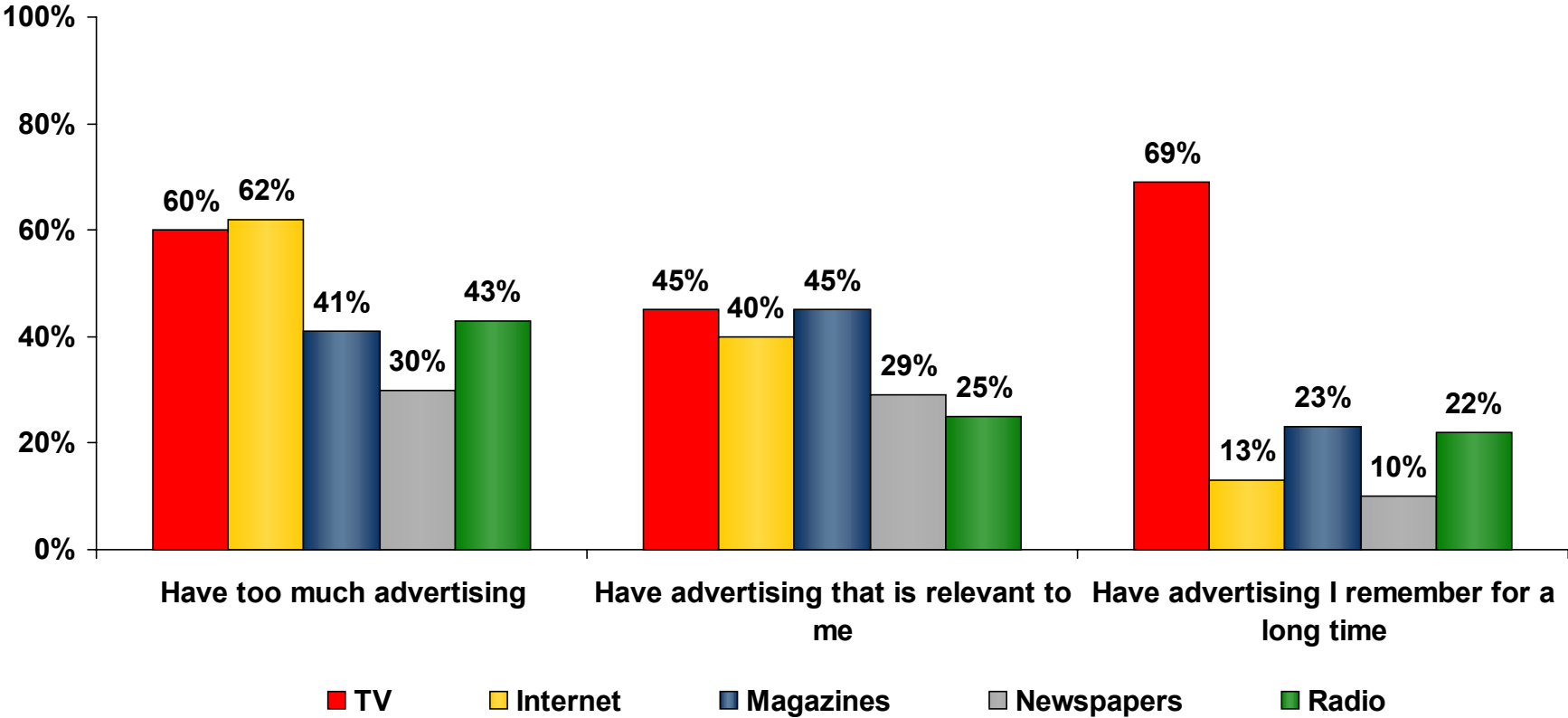
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...though there are still some areas where online advertising can improve

The Internet is thought to have too much advertising, which may contribute to its low score on advertising memorability. Online also has yet to achieve its full potential for relevance.



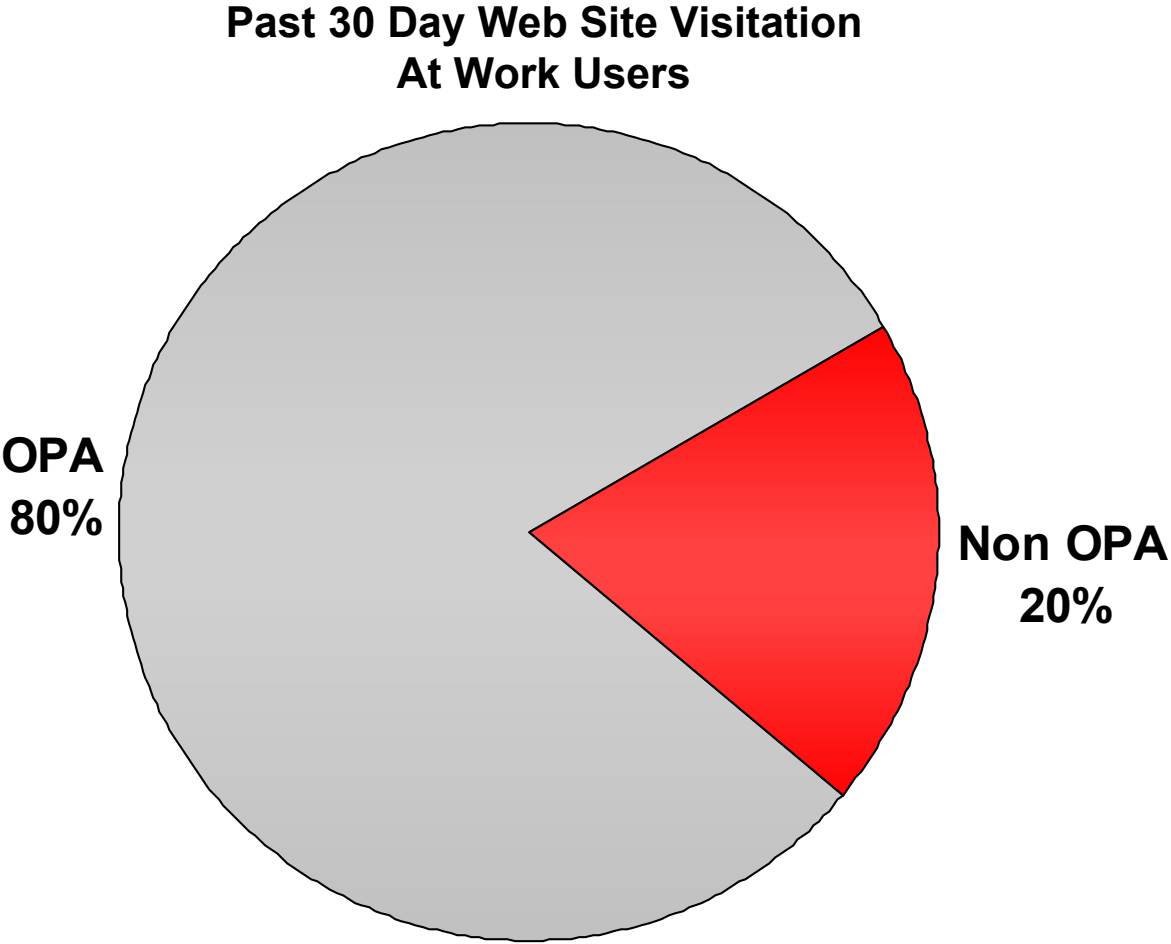
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OPA Member Sites and the At Work User

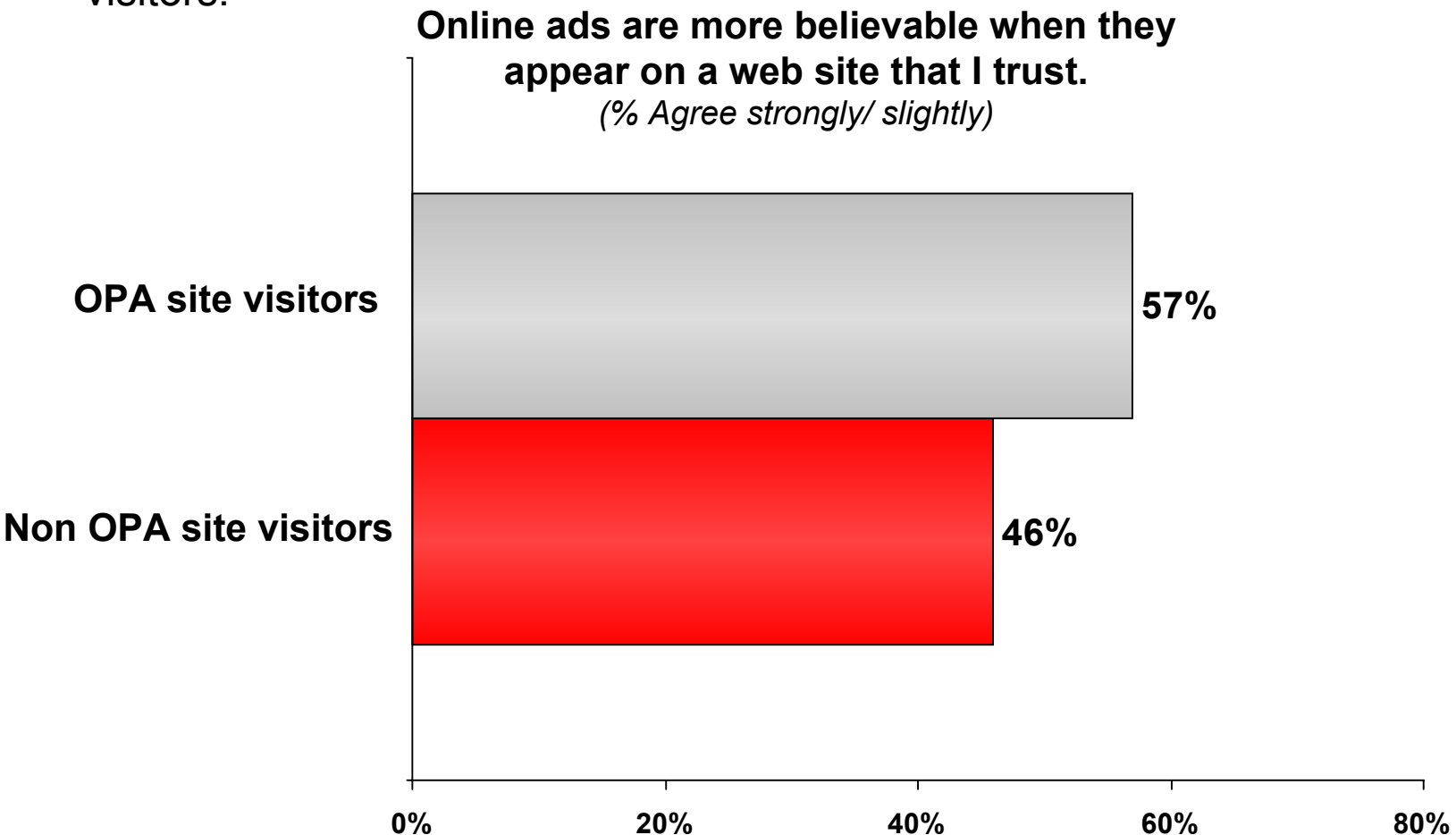
The vast majority of At Work Users visit OPA member sites



In the past 30 days, which, if any, of the following web sites have you accessed?
Base: At Work Users (755)
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Most OPA site visitors believe site content impacts advertising credibility

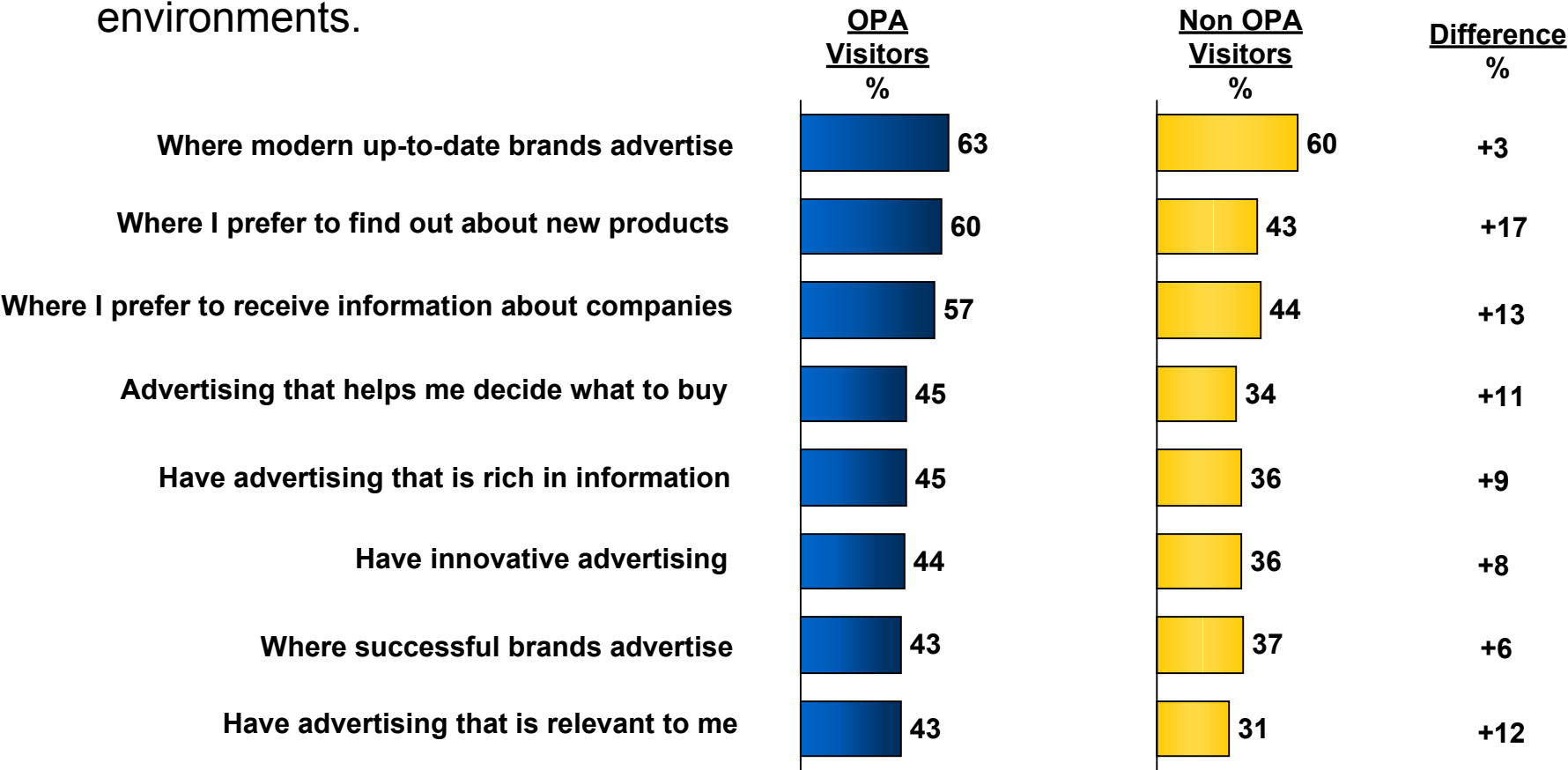
This proportion is significantly higher than that observed among Non-OPA visitors.



Q. 13: How much do you agree or disagree with these statements about any online advertising you may see?
Base: OPA At Work visitors (608) Non OPA At Work visitors (147)
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OPA site visitors have more positive attitudes toward Internet advertising

Attitudes toward Internet advertising are more positive among OPA visitors on all dimensions, suggesting these sites have created good advertising environments.



Q. 12: Please give your impressions of advertising you see on each of the following media. For each statement, please select all the different types of media which you think apply.

Base: At Work OPA visitors (608), At Work Non OPA visitors (147)

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Conclusions

- This study provides new information about the At Work Internet User which should better inform future media planning decisions.
- It clearly shows the value and potential of targeting the At Work User, and shows that the Internet is firmly entrenched in these users' daily media routines.
- At Work Users are generally favorable toward Internet advertising and believe that it has unique values in comparison to traditional media.
- The majority of At Work Users visit high-quality content sites as typified by the OPA and believe that editorial quality positively impacts advertising credibility.

Appendix

Definitions of Key Research Segments

6am-9am / 5am-8am	Morning
9am-1pm / 8am-12pm	Daytime
1pm-4:30pm / 12pm-3:30pm	Daytime
4:30pm-6pm / 3:30pm-5pm	Early Fringe
6pm-7pm / 5p-6pm	Early Fringe
7pm-11pm / 6pm-10pm	Prime Time
11pm-1am	Late Fringe
1am-6am / 12am-5am	Late Night

Fieldwork Details

- Fieldwork was conducted among a representative sample of Lightspeed web panelists during November 2001.
- Interviews were conducted Tuesday-Saturday to ask about yesterday weekday media consumption.
- Quotas were imposed to ensure the sample was evenly balanced across each day of the week.