



**Dedicated to representing the highest standards in Internet publishing**

## **At Work Internet Audience Media Consumption Study**

conducted in  
partnership with



**Millward Brown  
IntelliQuest**

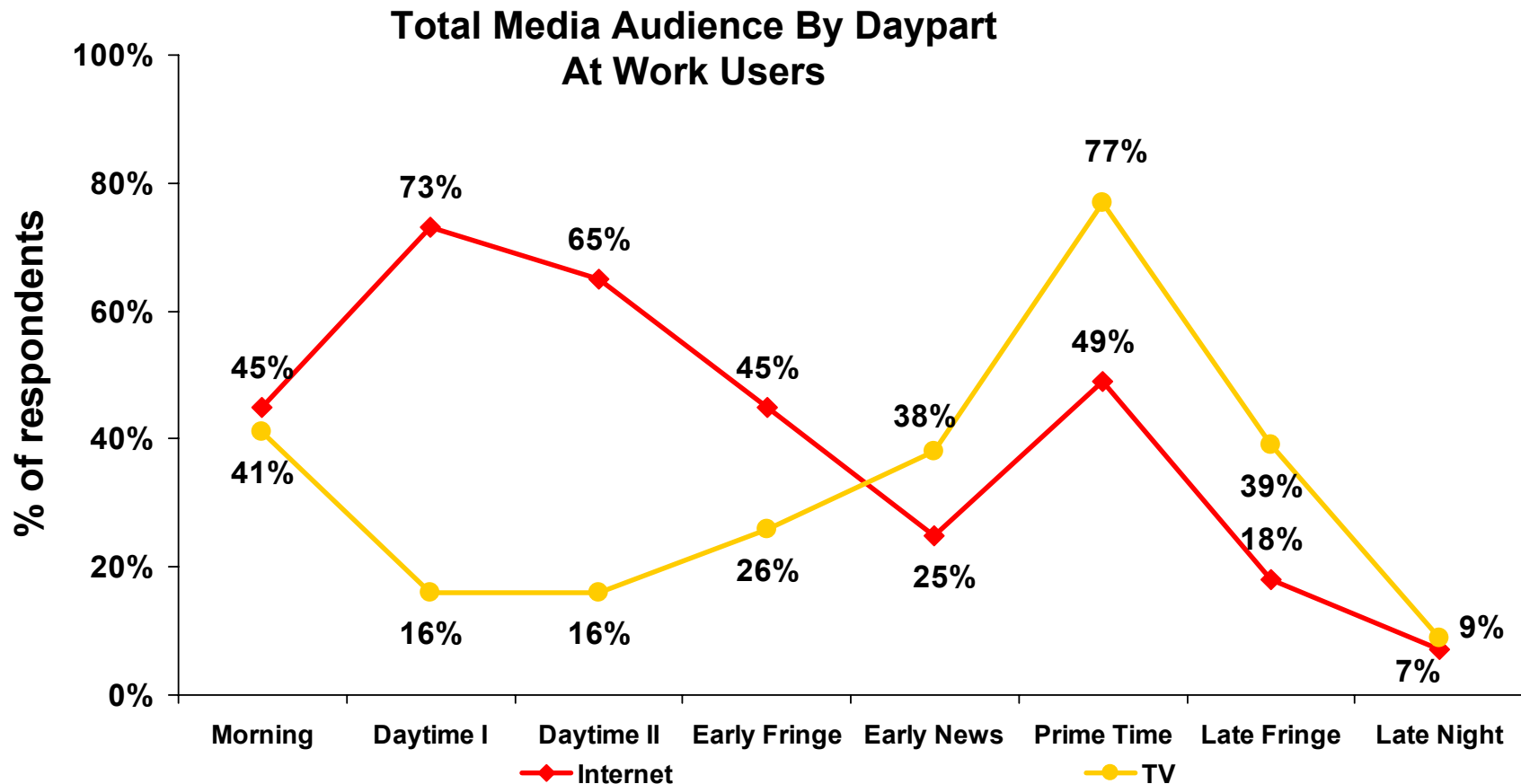
# Definition of Research Segments

- The findings of the 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 95% accessed from work in the past week, and 75% 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.
- All survey questions asked respondents about their Internet usage *excluding* usage for email.

# Key Findings

- Daytime continues to be primetime online; for more than 25% of At Work Users, the Internet is the *only* medium used during the day
- At Work Internet users are significantly younger, more affluent, and better educated than their Non-Work Counterparts
- Among the At Work audience, usage varies by demographic group:
  - Top-level professionals and the affluent are more likely to be online during the day
  - Two-thirds of Working Mothers are online in the morning (Daytime I)
- Among the At Work audience, online activities vary by time of day:
  - News and meeting preparation dominate mornings
  - Shopping is the most prevalent activity in the evenings
- Online tenure (the number of years that users have been online) is a key determinant of usage levels and activities.
- At Work users (74%) believe the Internet improves their productivity at work while 56% use the Internet at home for business purposes

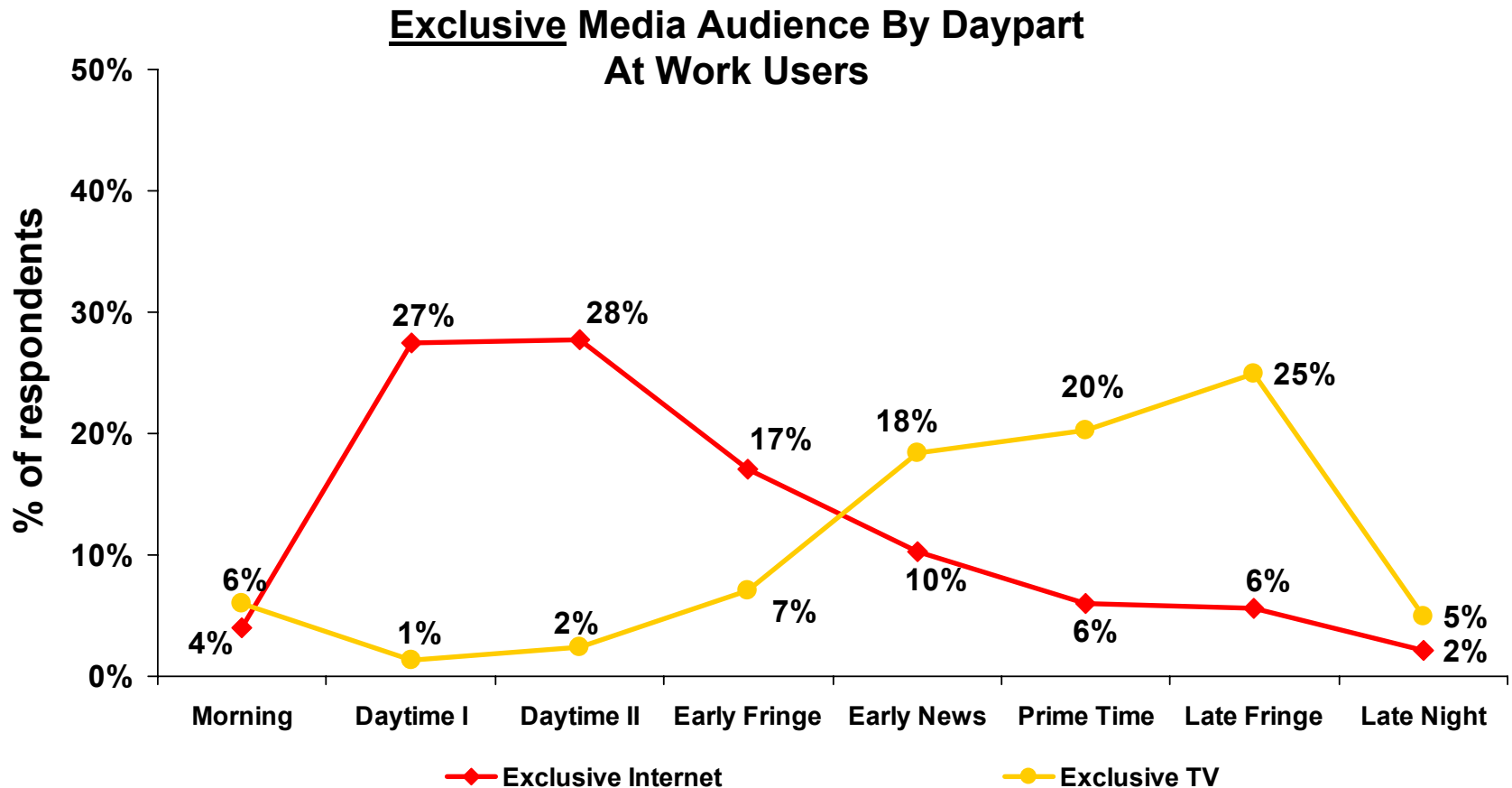
# Daytime on the Internet is prime time for At Work Users



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M4-2/M1-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: At Work (1053)

# The Internet is the only way to reach > 1/4 of At Work users during the day



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M4-2/M1-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: At Work (1053)

# Demographics: At Work Audience vs. Non-Work Audience

	2003	
	At Work	Non-Work
	%	%
	A	B
Male	50	56
Female	50	44
18-34	33 B	21
35-55	54	48
55+	13	32 A
Bachelors degree or higher	59 B	39
Household Grocery Shopper	82	85
Major household purchase	97	97
HH income \$75k plus	43 B	26
Authorize company spending	72 B	56
Base: Total	(1053)	(363)

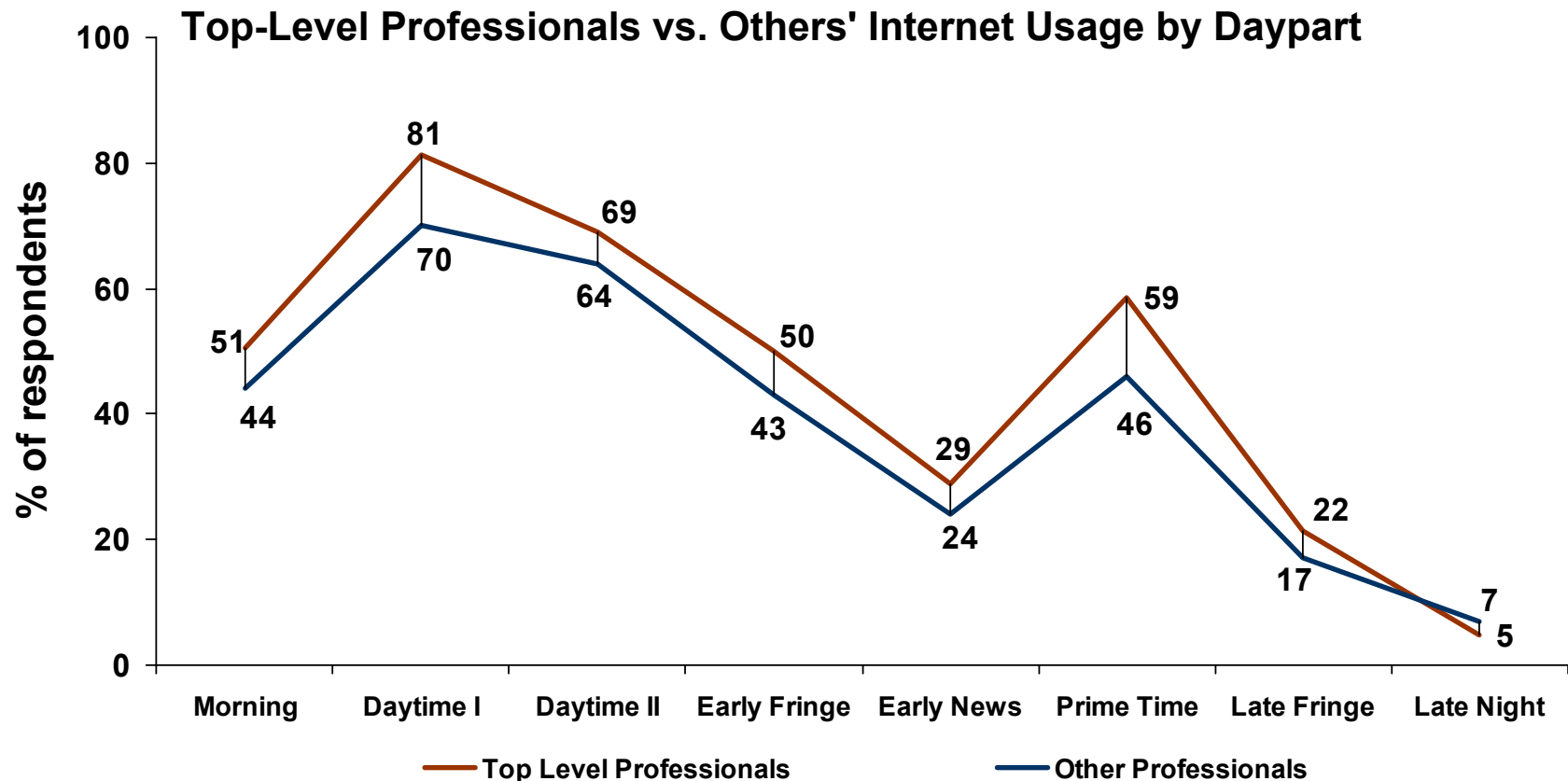
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

A/B = Significantly different at the 95% confidence level.

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**The following charts illustrate  
the Internet audience *by*  
*Daypart* for selected  
demographic segments**

# Top-level Professionals exceed the average for At Work usage



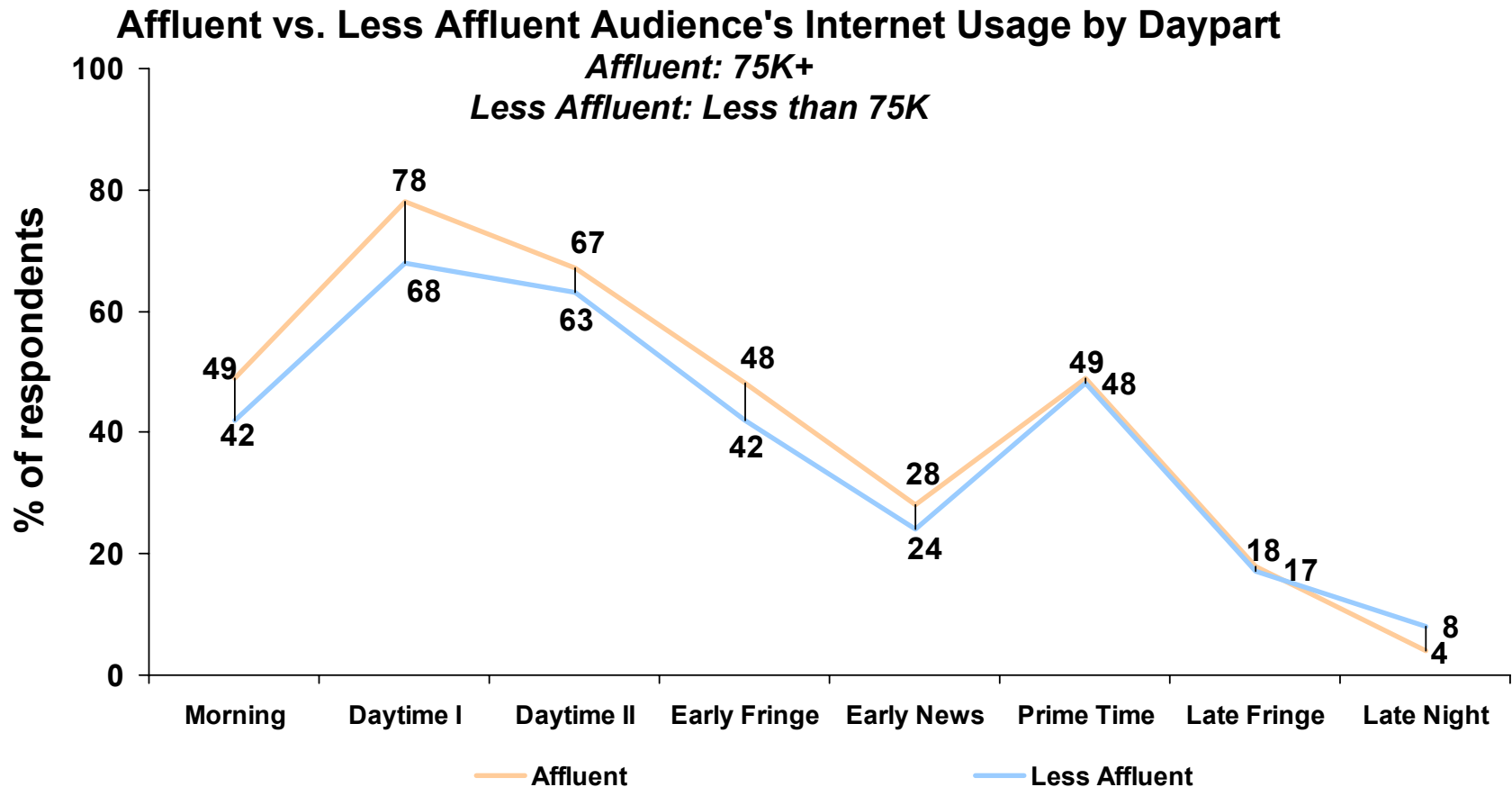
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work - Top Level Prof. (216), Other Prof. (836)

Top-level professionals are defined as C-level executives, MIS managers and department managers



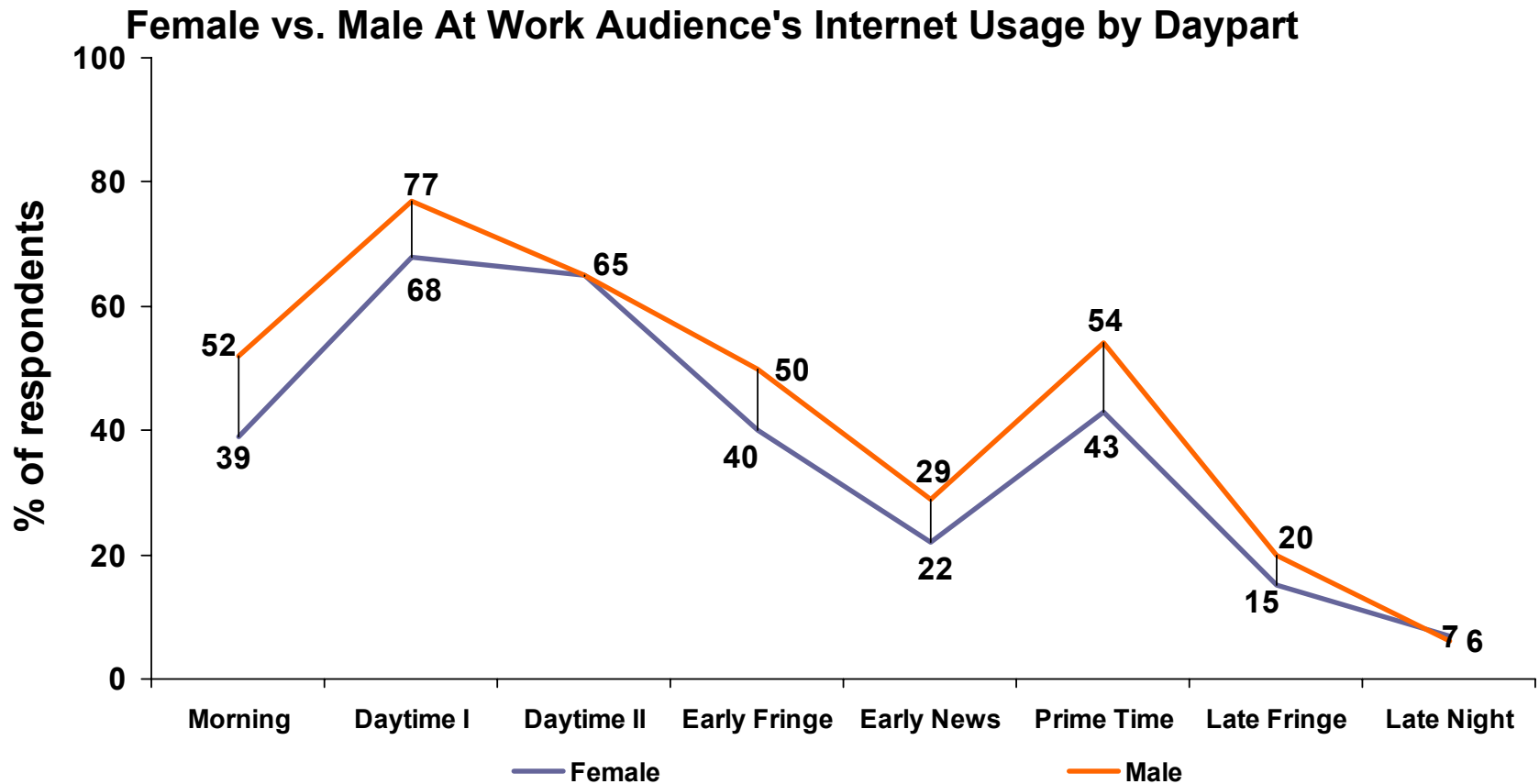
# Affluent users are more prevalent throughout the day until evening



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work – Affluent (451), Less Affluent (602)

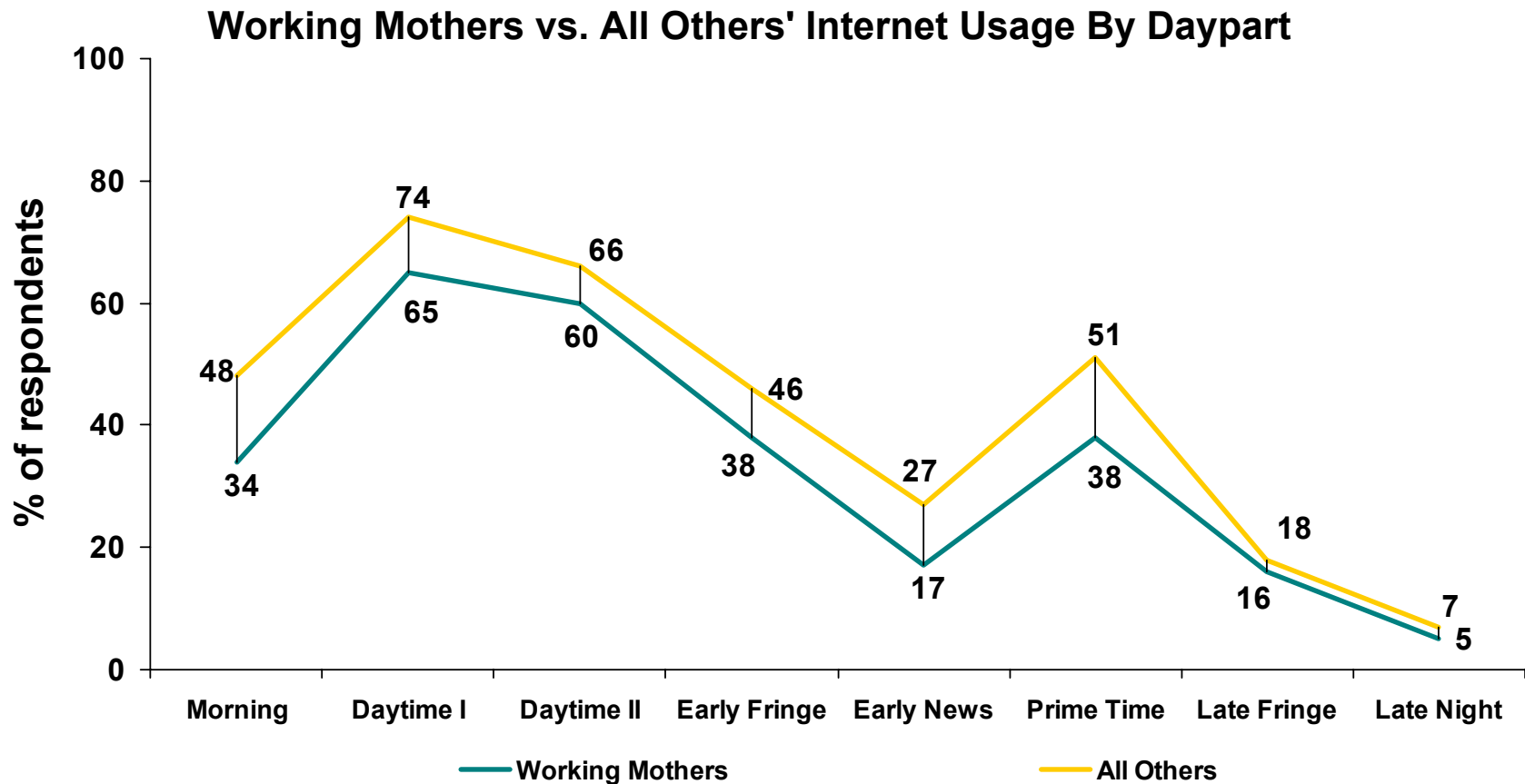
# Males are more likely to be online than females during most dayparts



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work – Female (527), Male (526)

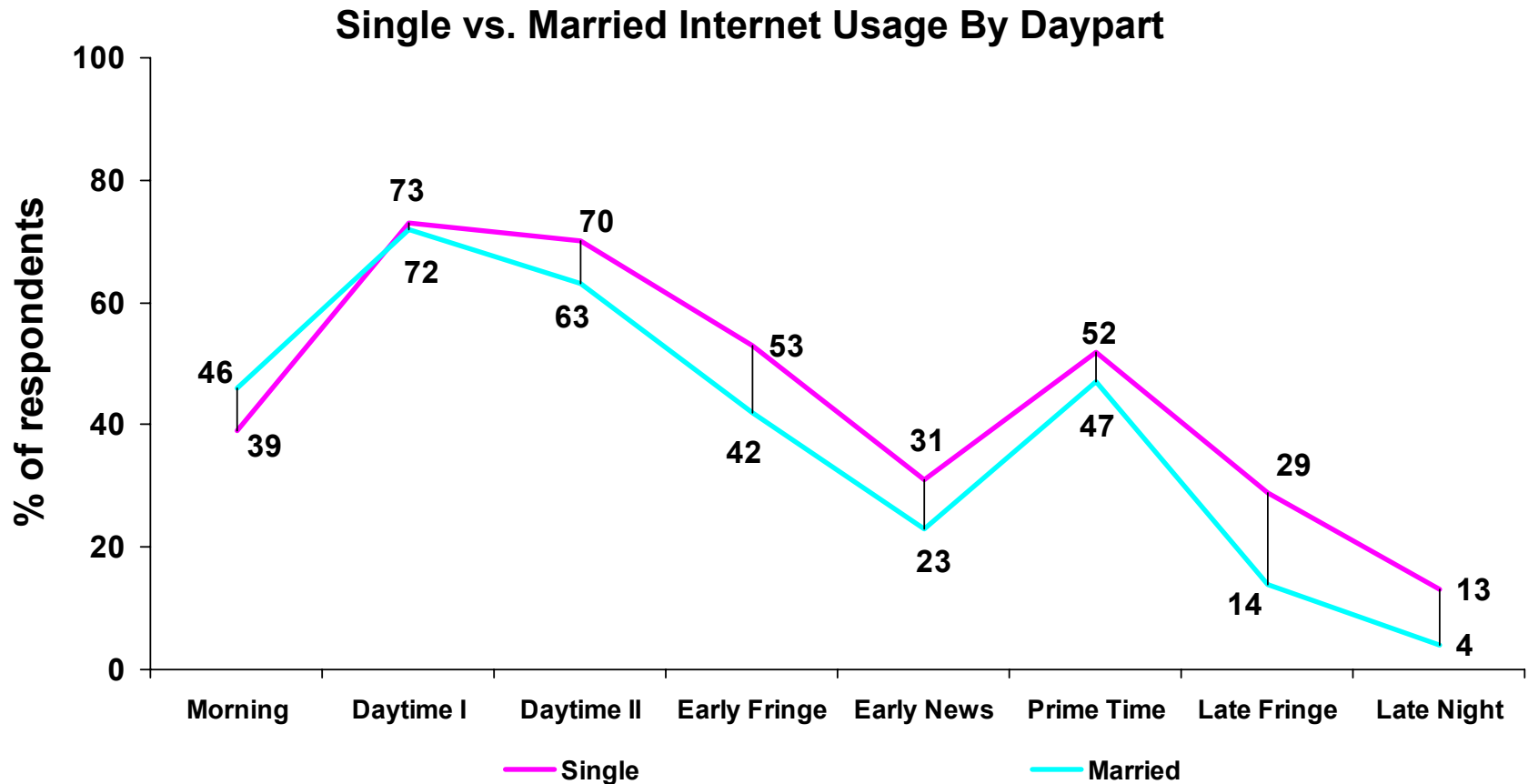
# Working Mothers vs. All Others: Internet Usage by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work: Working Mothers (219), All Others (834)

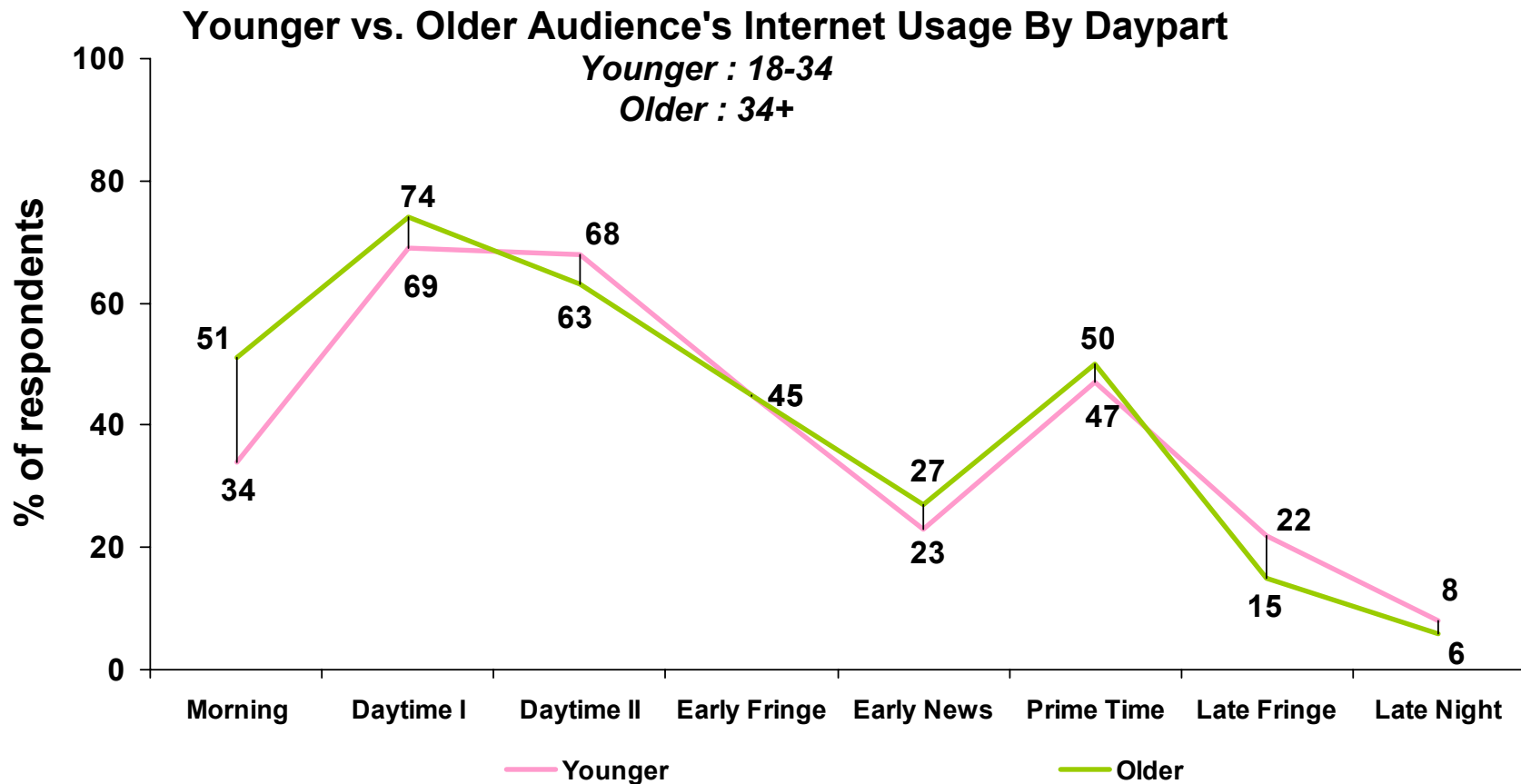
# Single vs. Married: Internet Usage by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work: Single (Never Married) (205), Married (657)

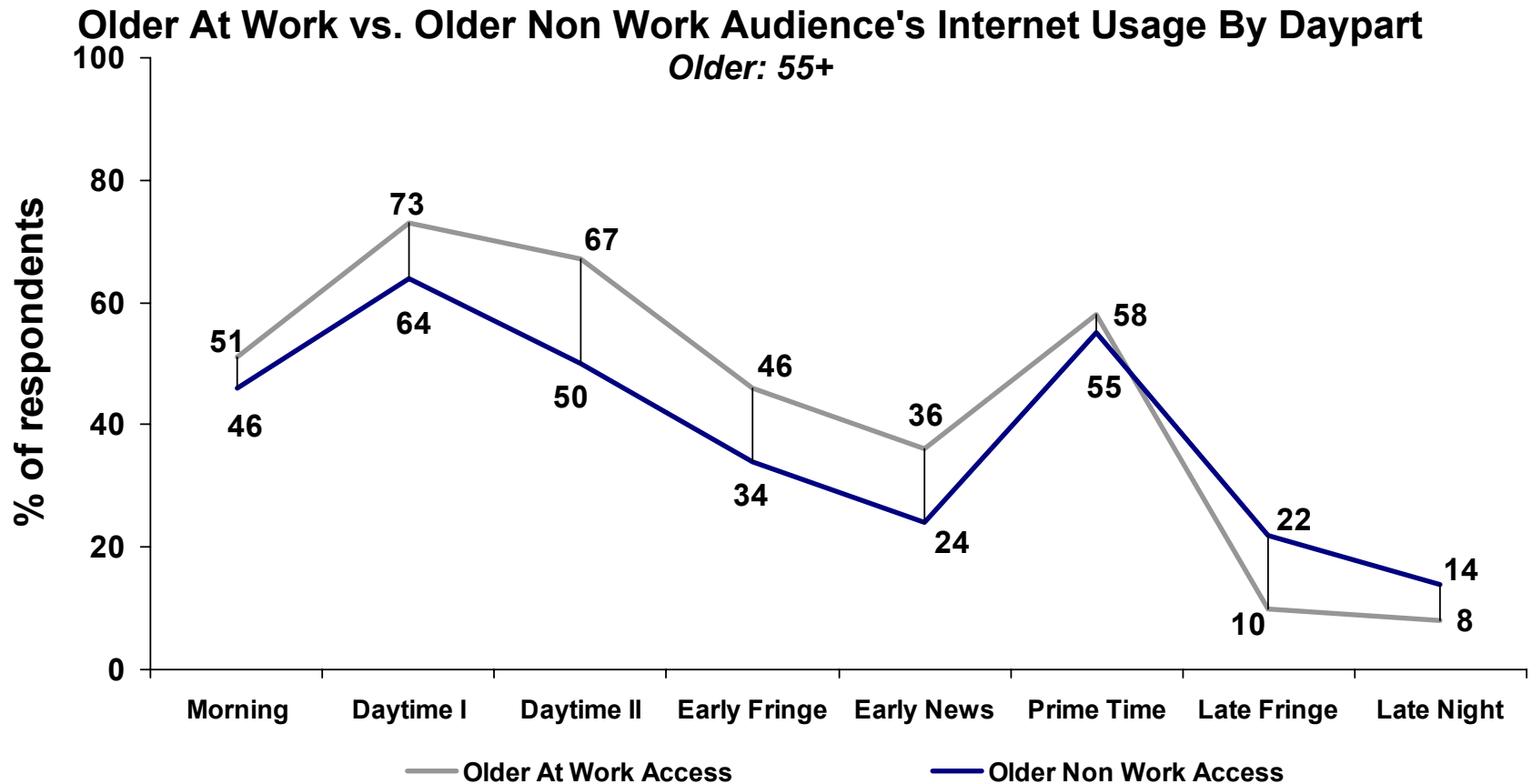
# 18 – 34 year olds vs. 34+: Internet Usage by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work - Younger (343), Older (709)

# 55 year old and over At Work vs. Non-Work: Internet Usage by Daypart



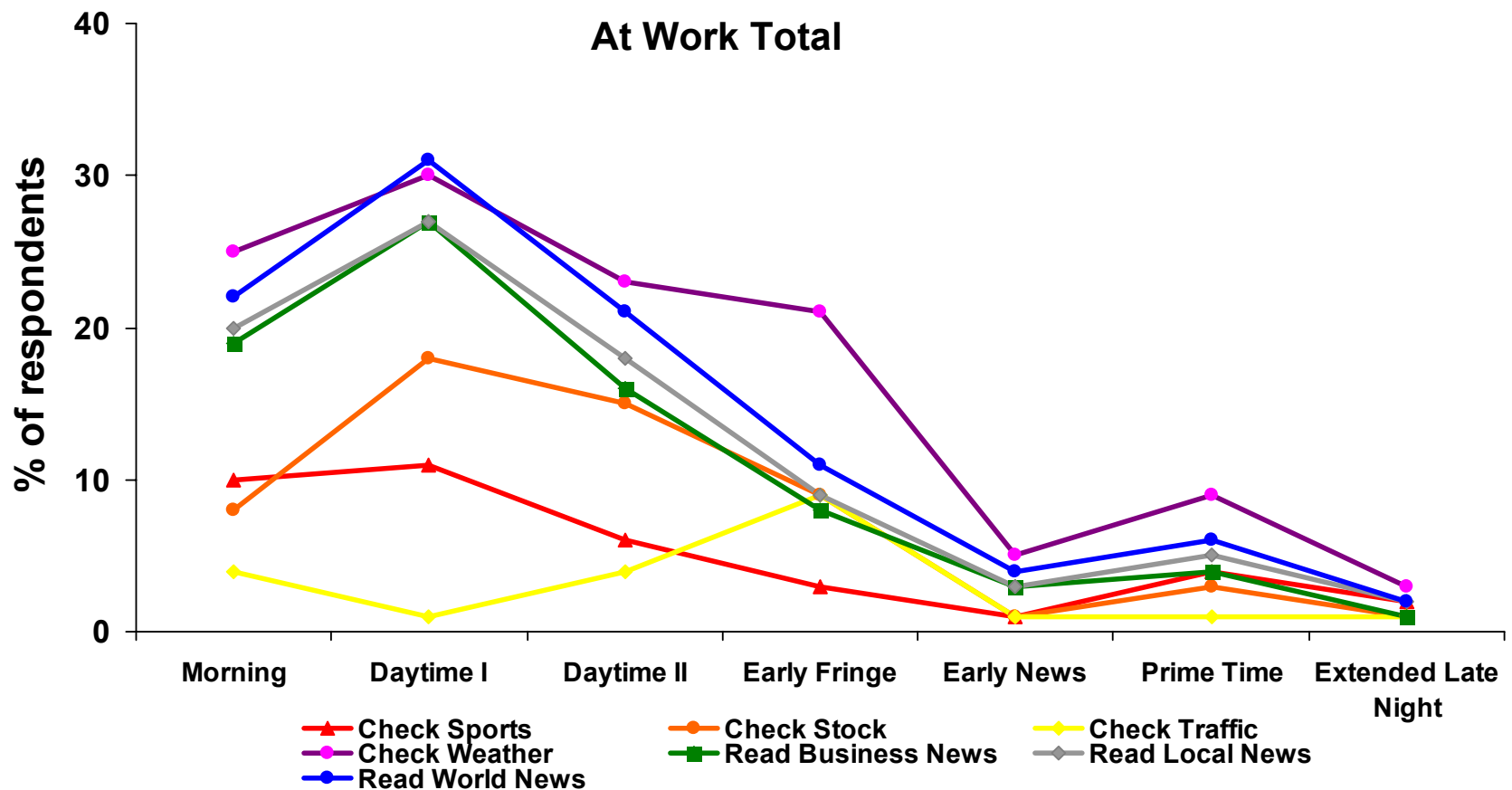
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 1: How much time did you spend on the Internet yesterday between <daypart>? Base: At Work (139), Non Work (114)

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# Internet Activities by Daypart

# For 13 surveyed online activities, daytime usage predominates...

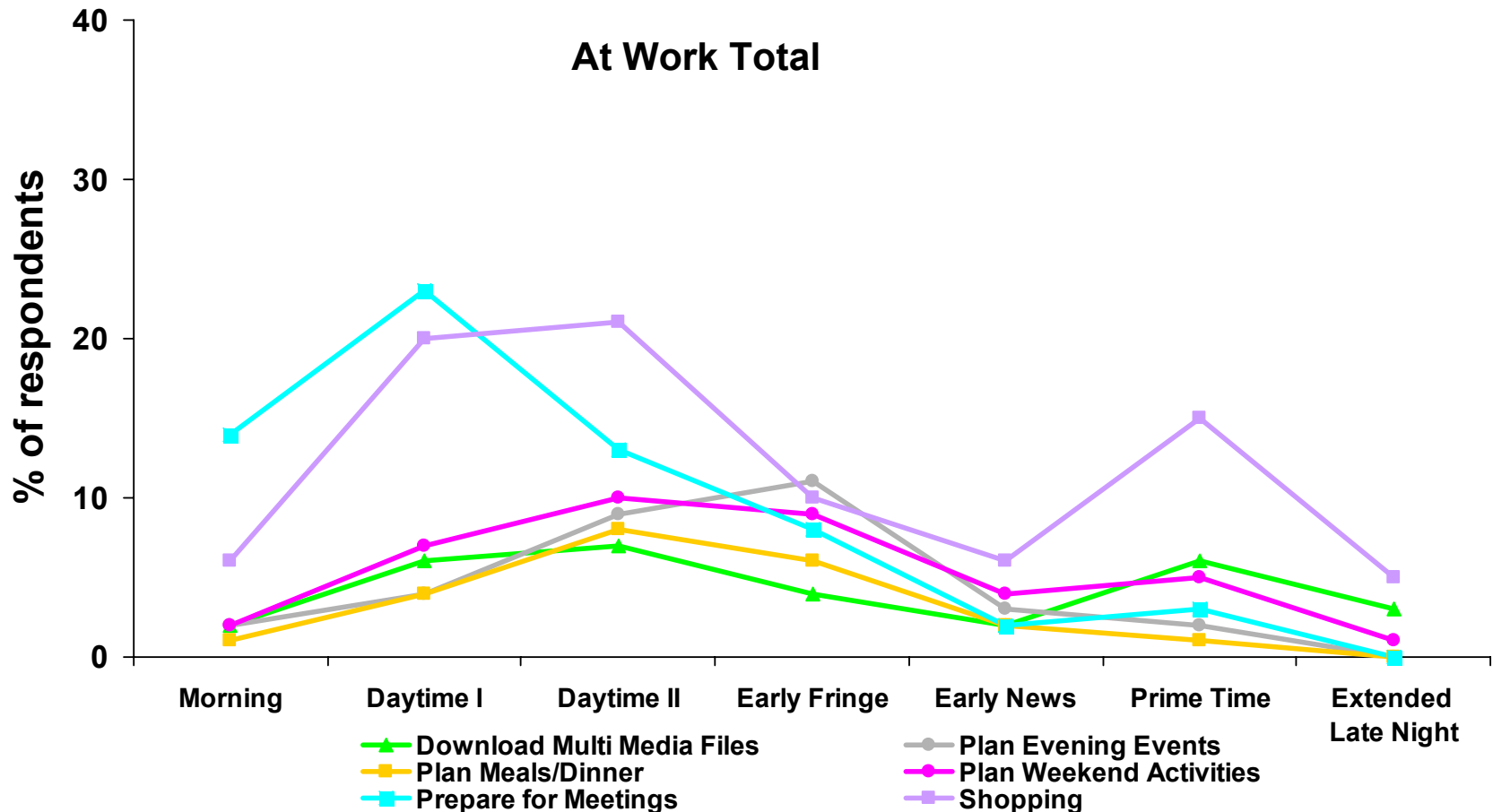


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Total At Work (1053)



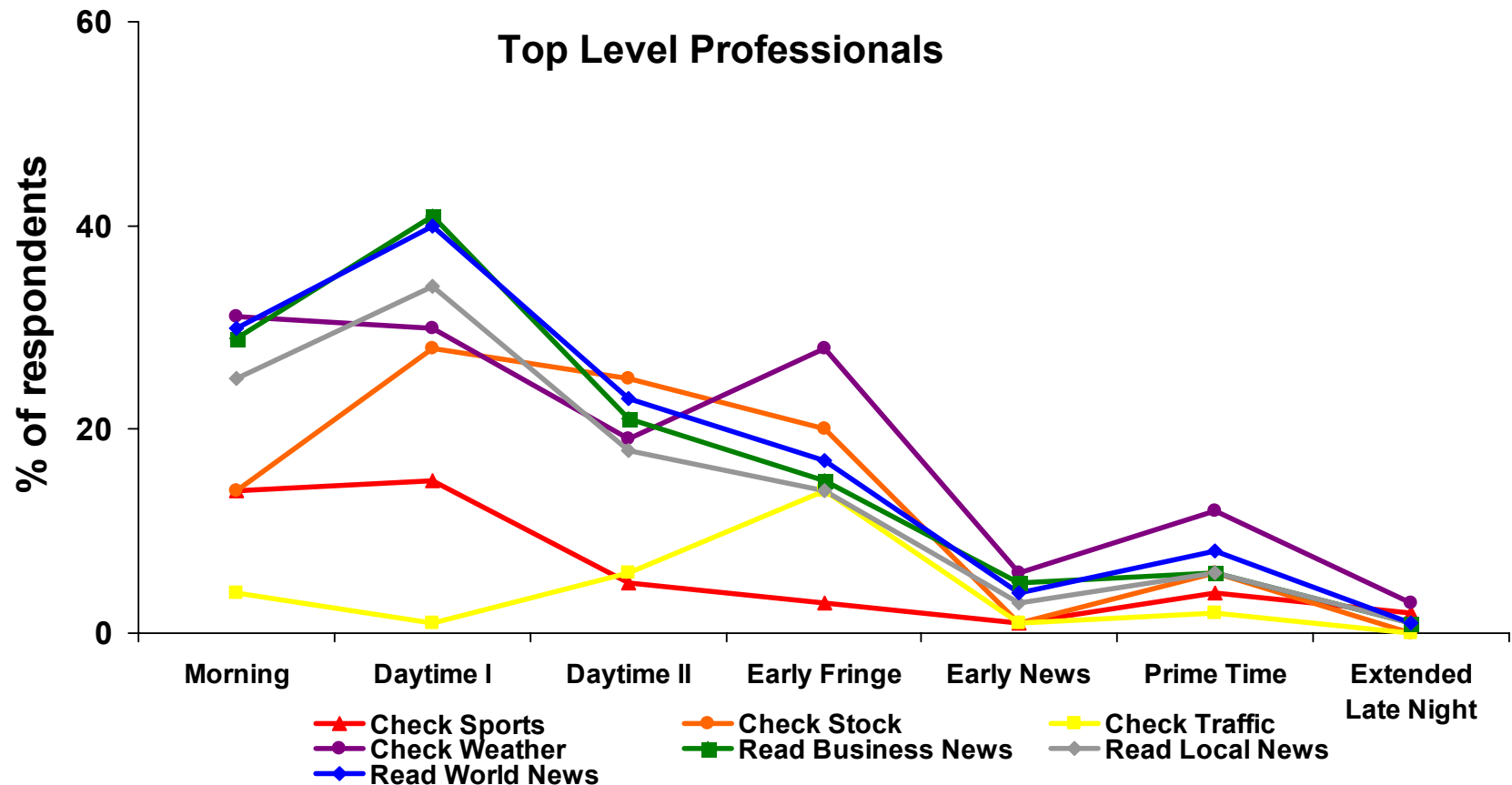
# ...exceptions are shopping and entertainment which also peak in p.m.



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Total At Work (1053)

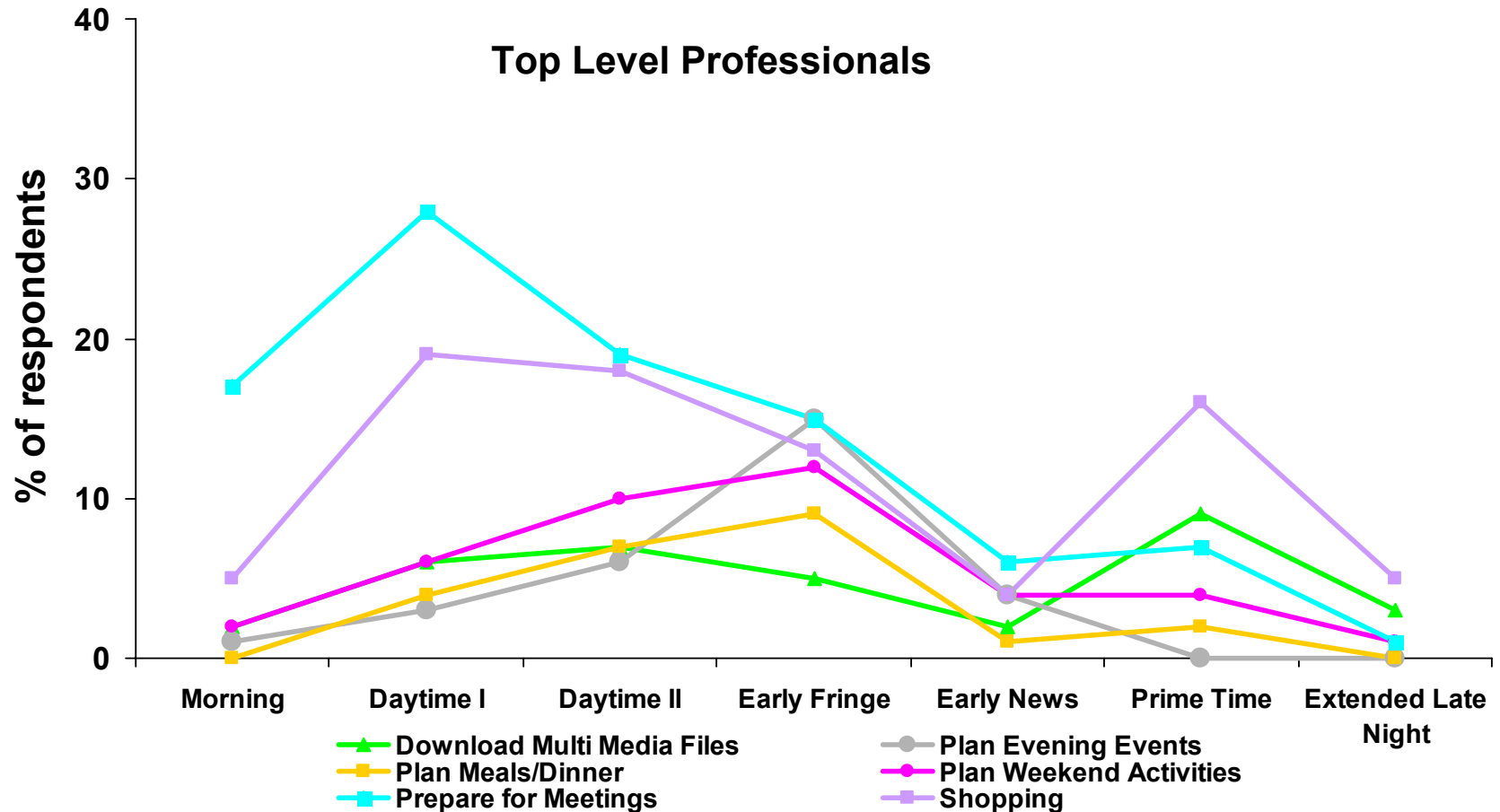
# Executives use the Internet in the morning for news and to prepare...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Top Prof. (216)

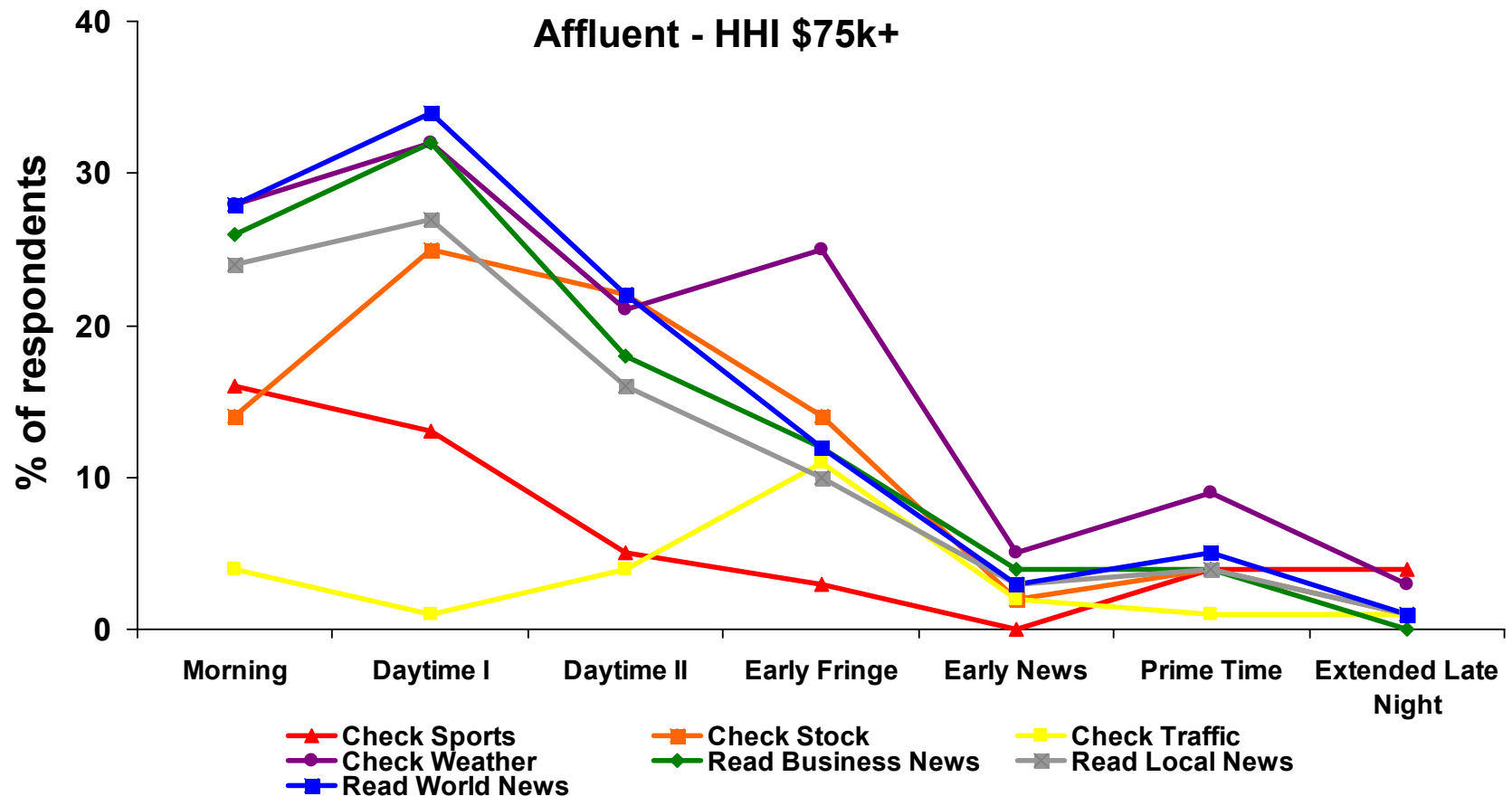
# ...for meetings; shopping and entertainment are dominant at night



Source: Online Publishers Association/MBIQ Media Consumption Study, April 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Top Prof. (216)

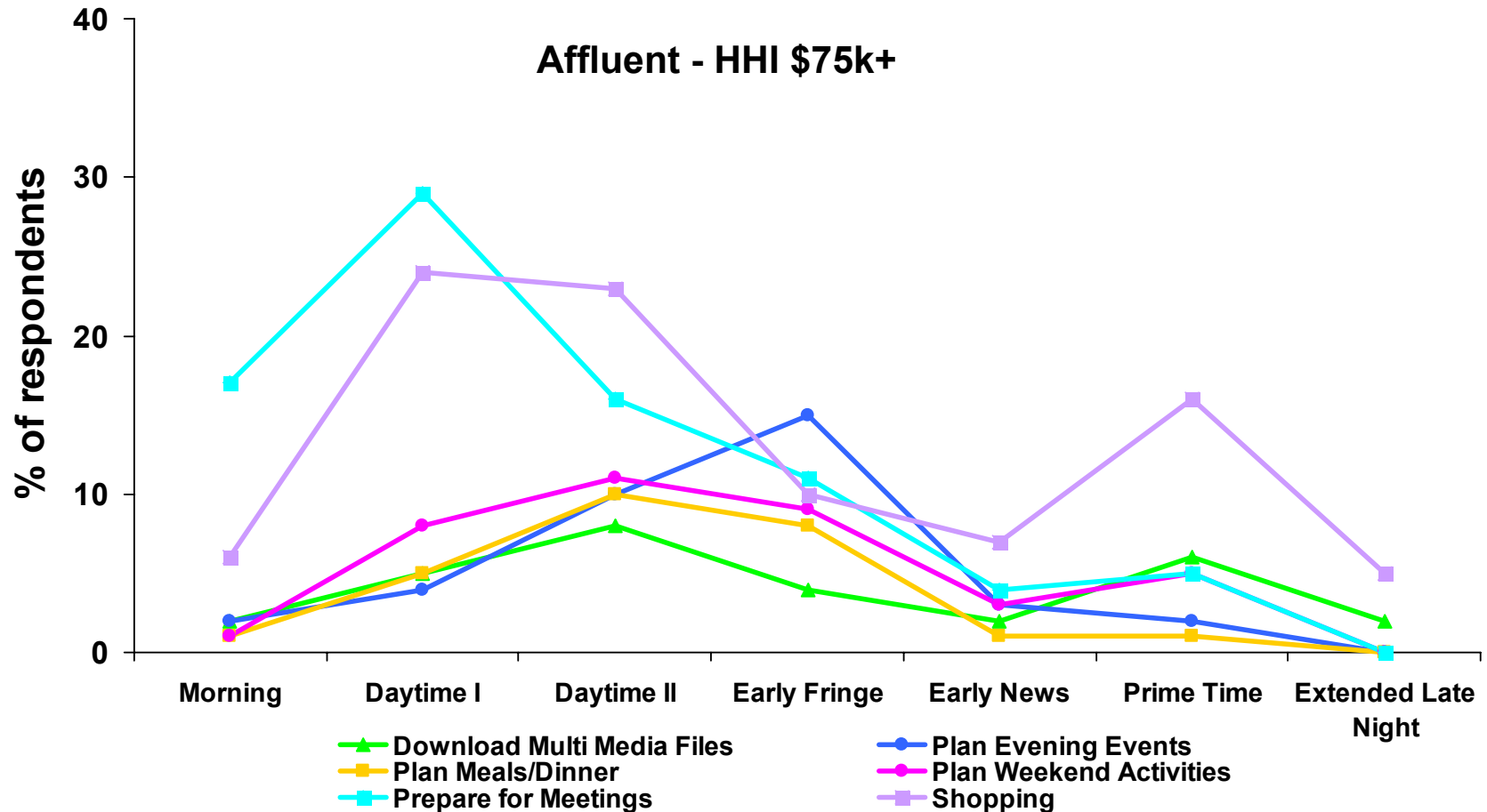
# Affluent workers display similar usage patterns to Executives...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Affluent (451)

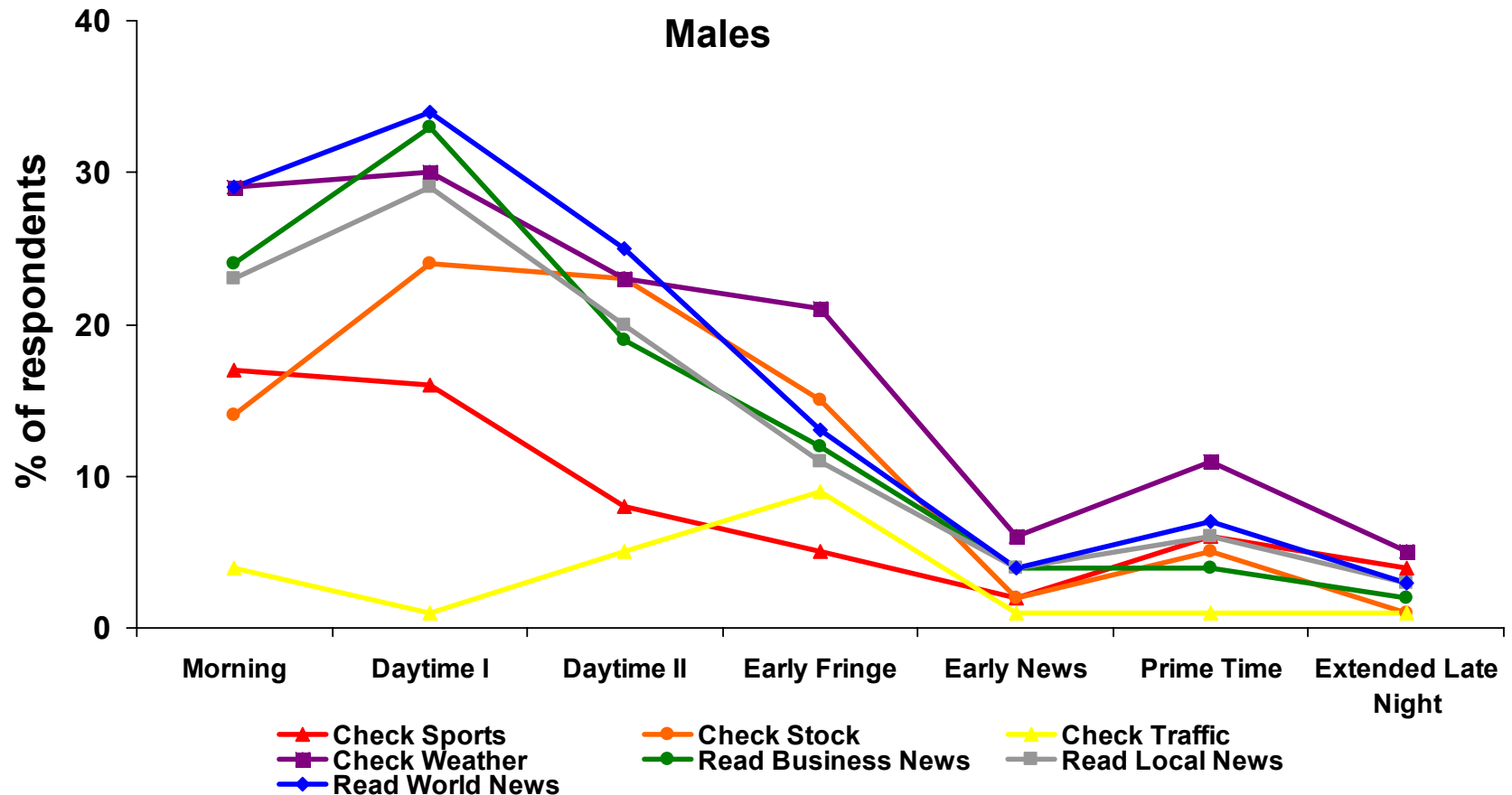
# ...with slightly larger share of them shopping during the lunch hour



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Affluent (451)

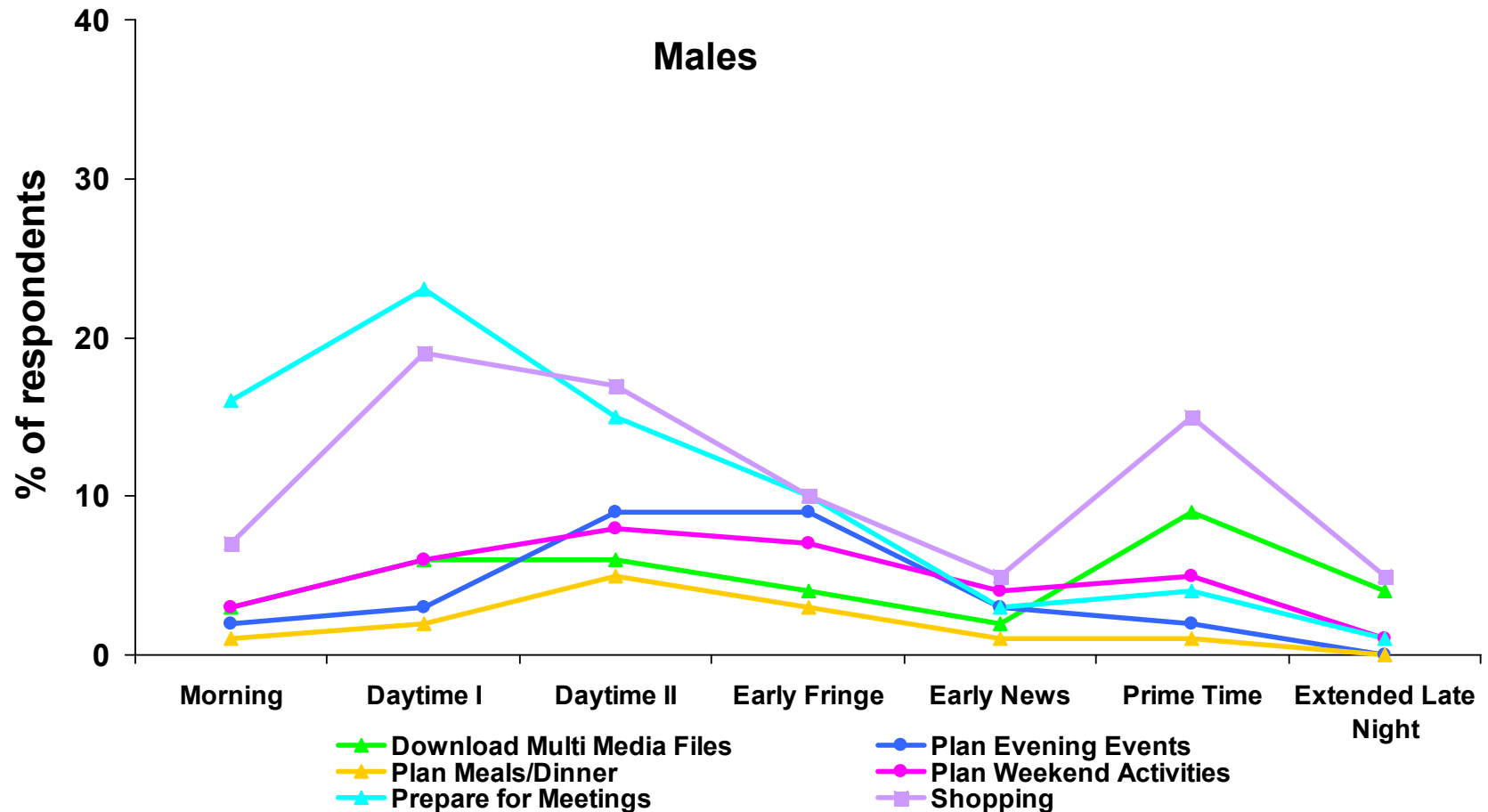
# Men show a greater emphasis on checking stocks...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Males (526)

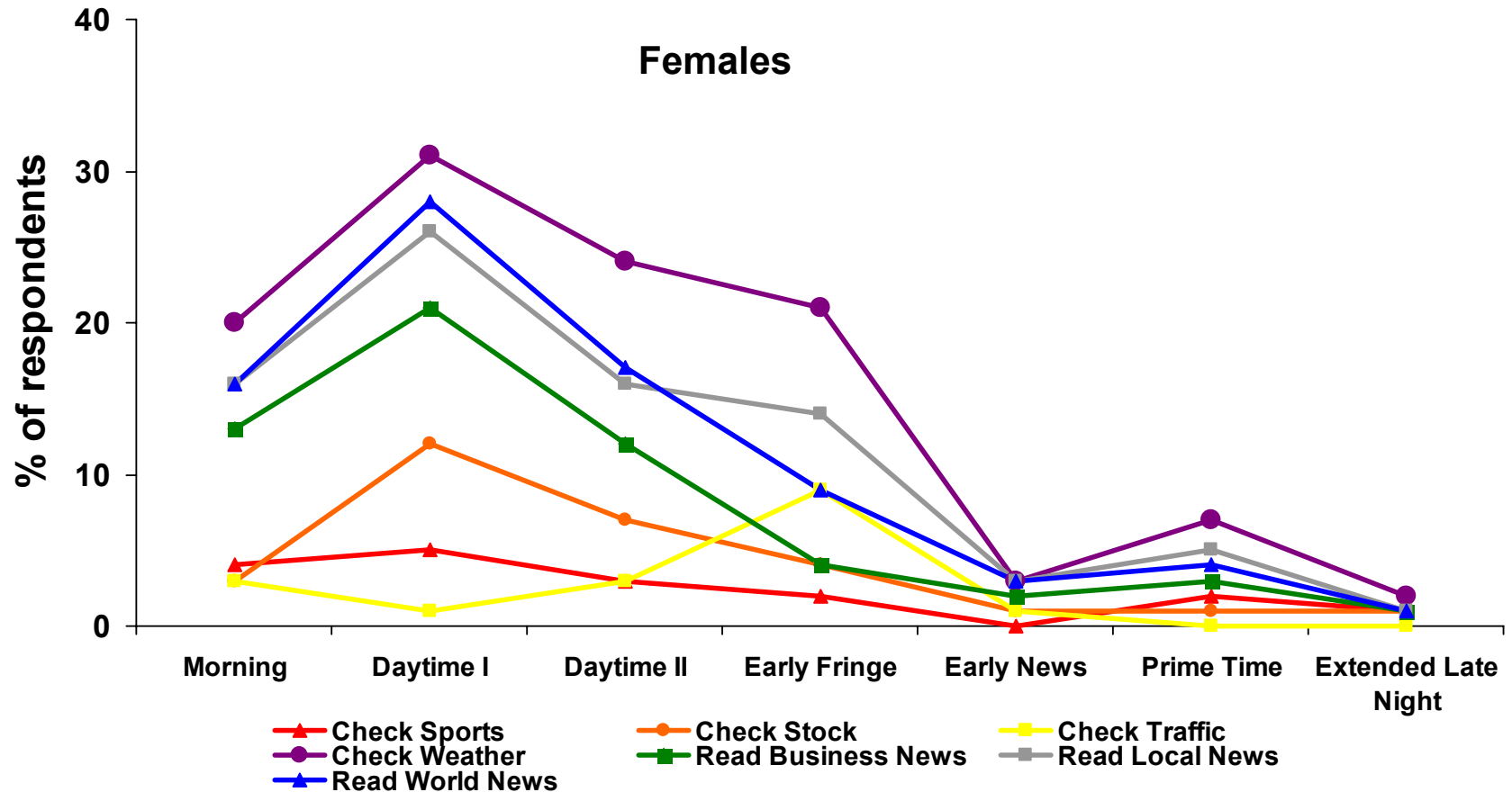
# ...other patterns are consistent with the At Work averages



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Males (526)

# Working women are avidly checking the weather during the day...

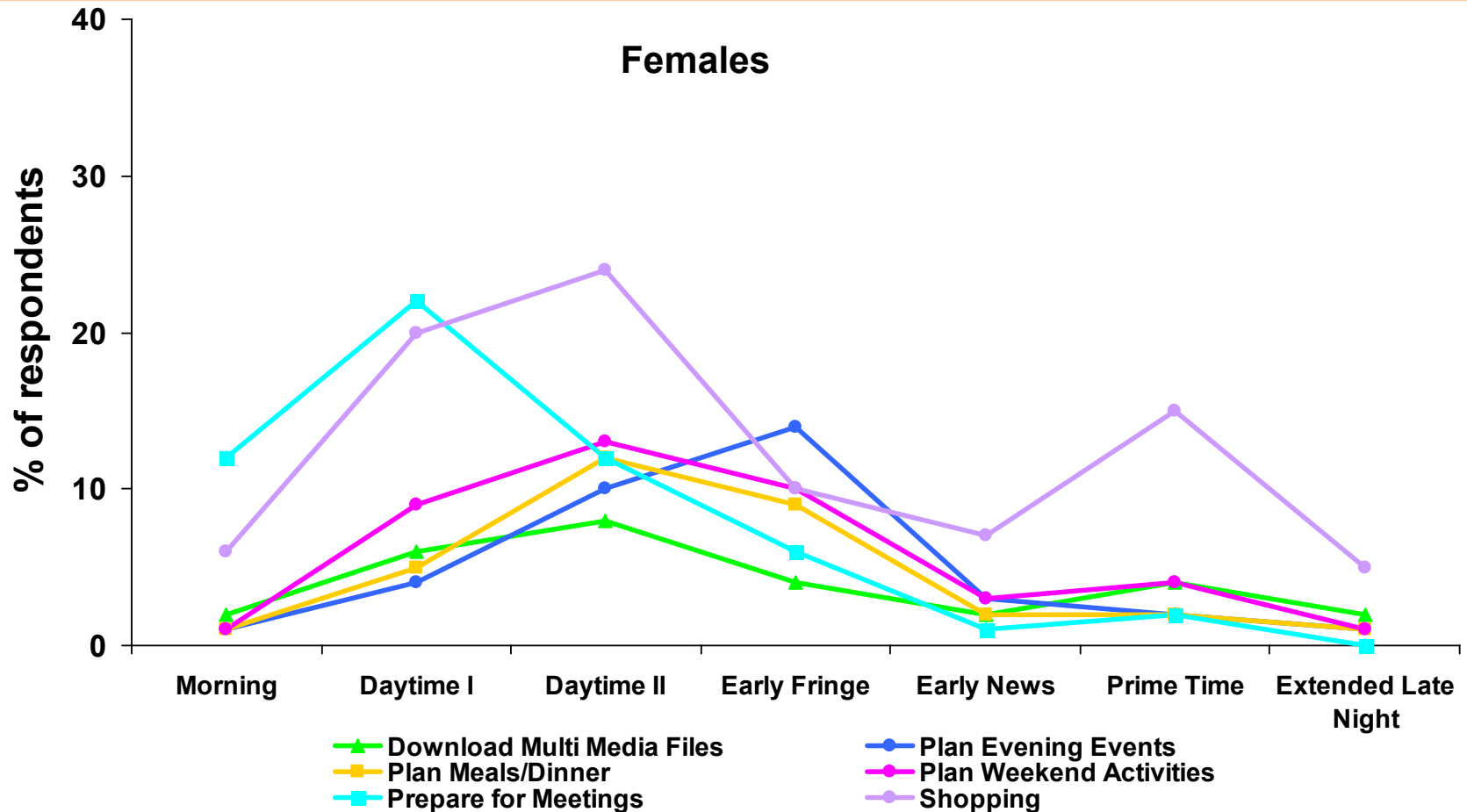


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Females (527)



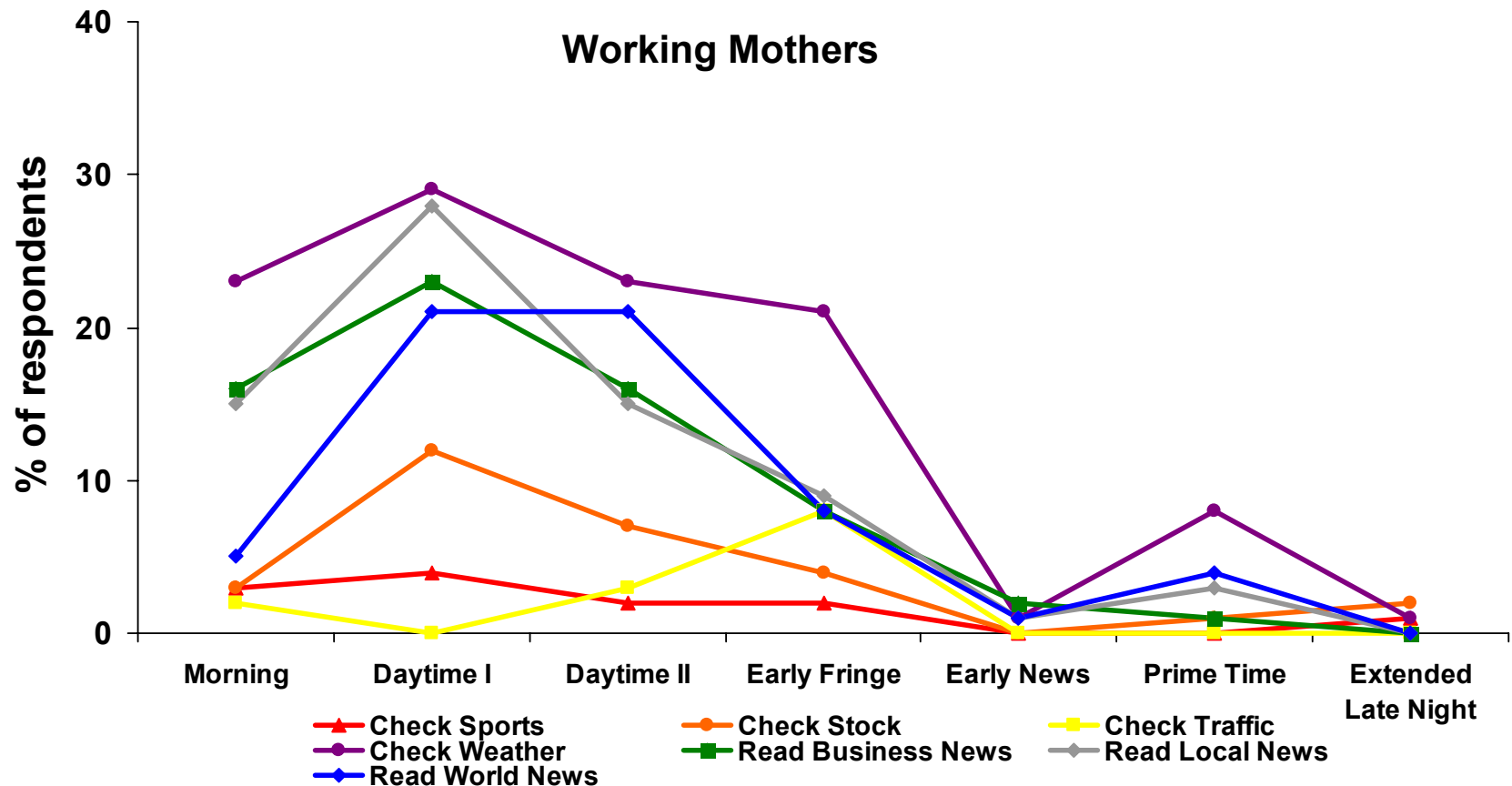
# ... and primarily online to shop in the evenings - if at all



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Females (527)

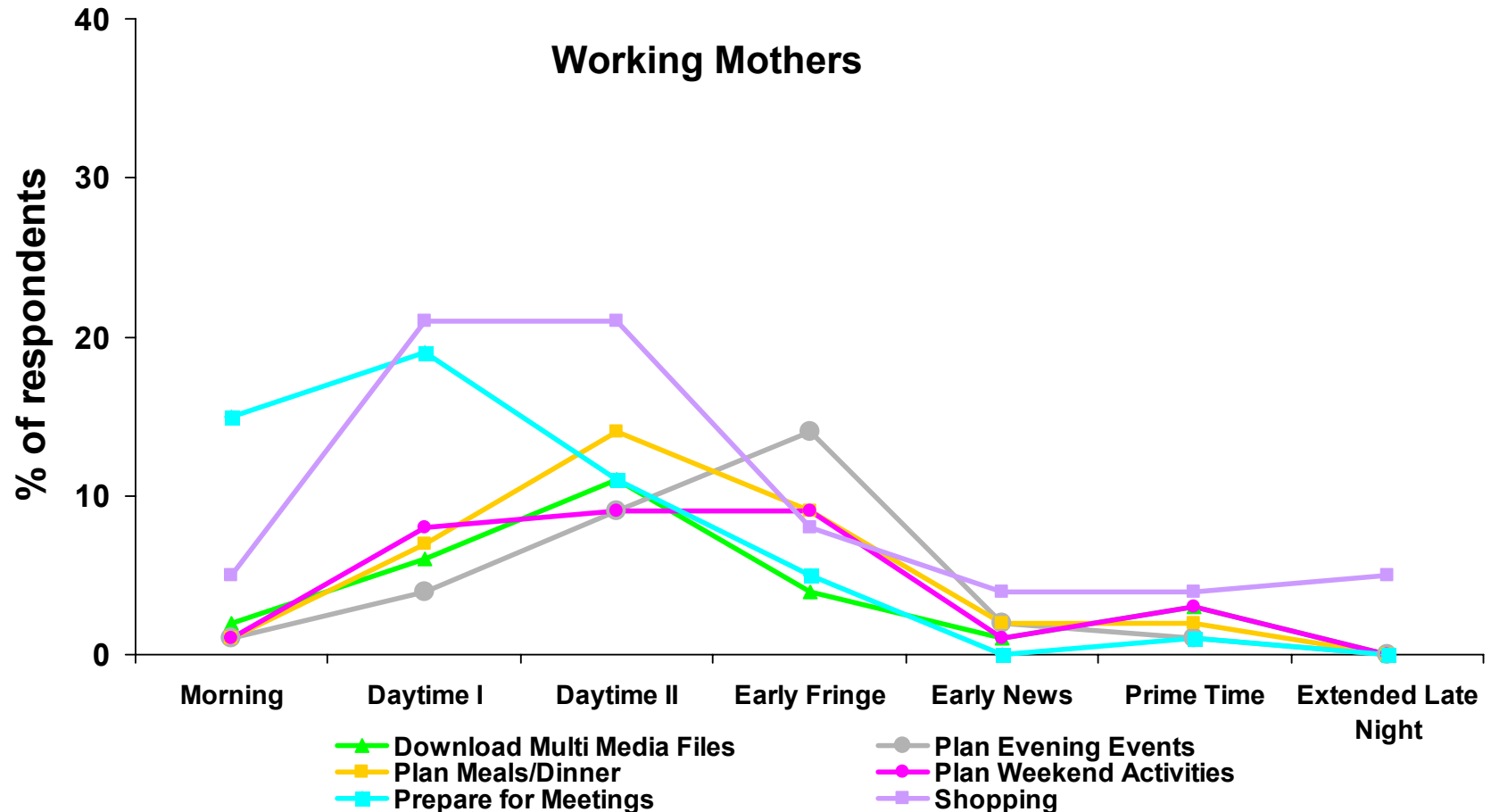
# Working mothers are focused on local news and weather...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Working Mothers (226)

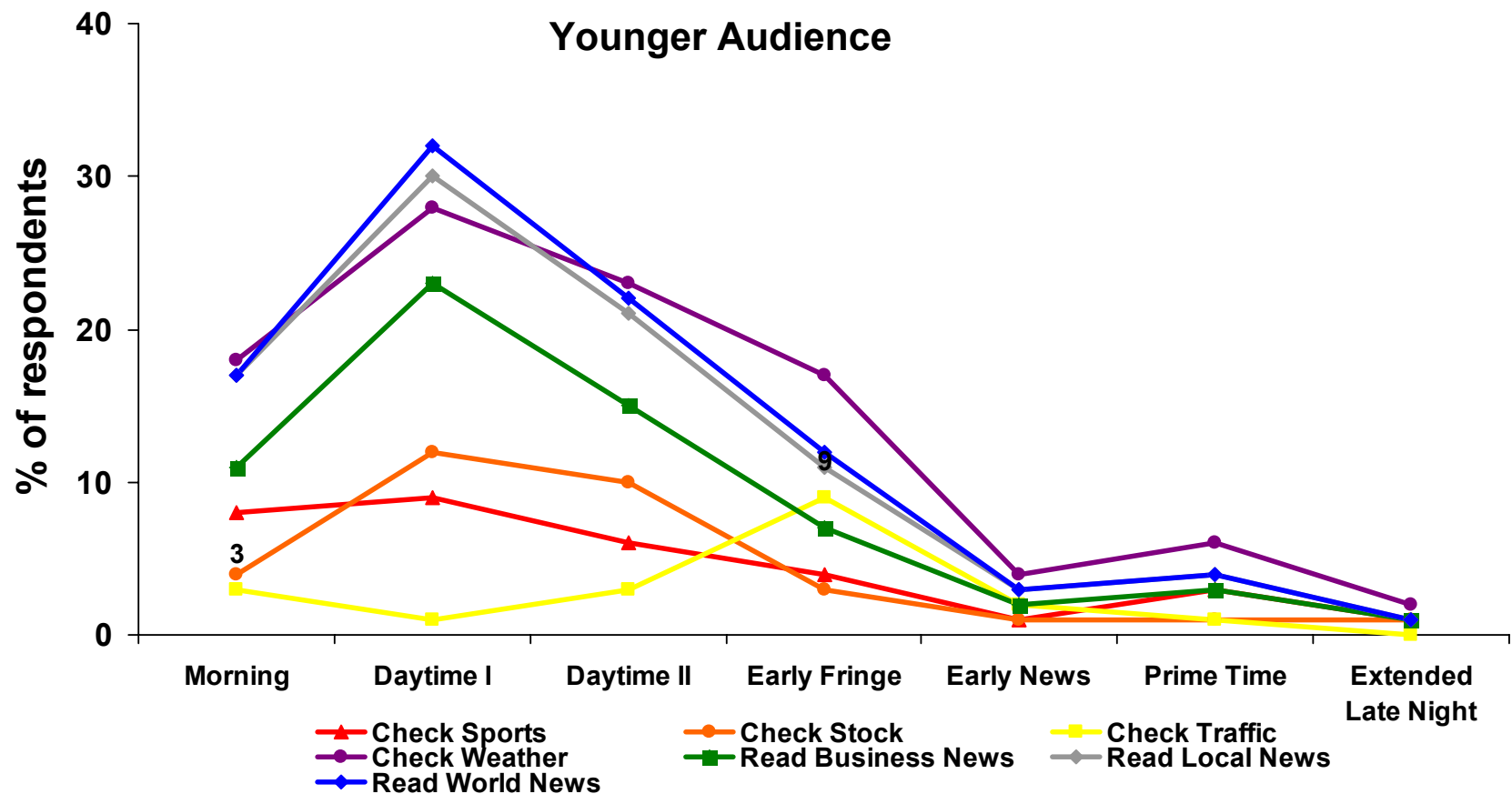
# ...and even less likely to be online in the evenings than women overall



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Working Mothers (226)

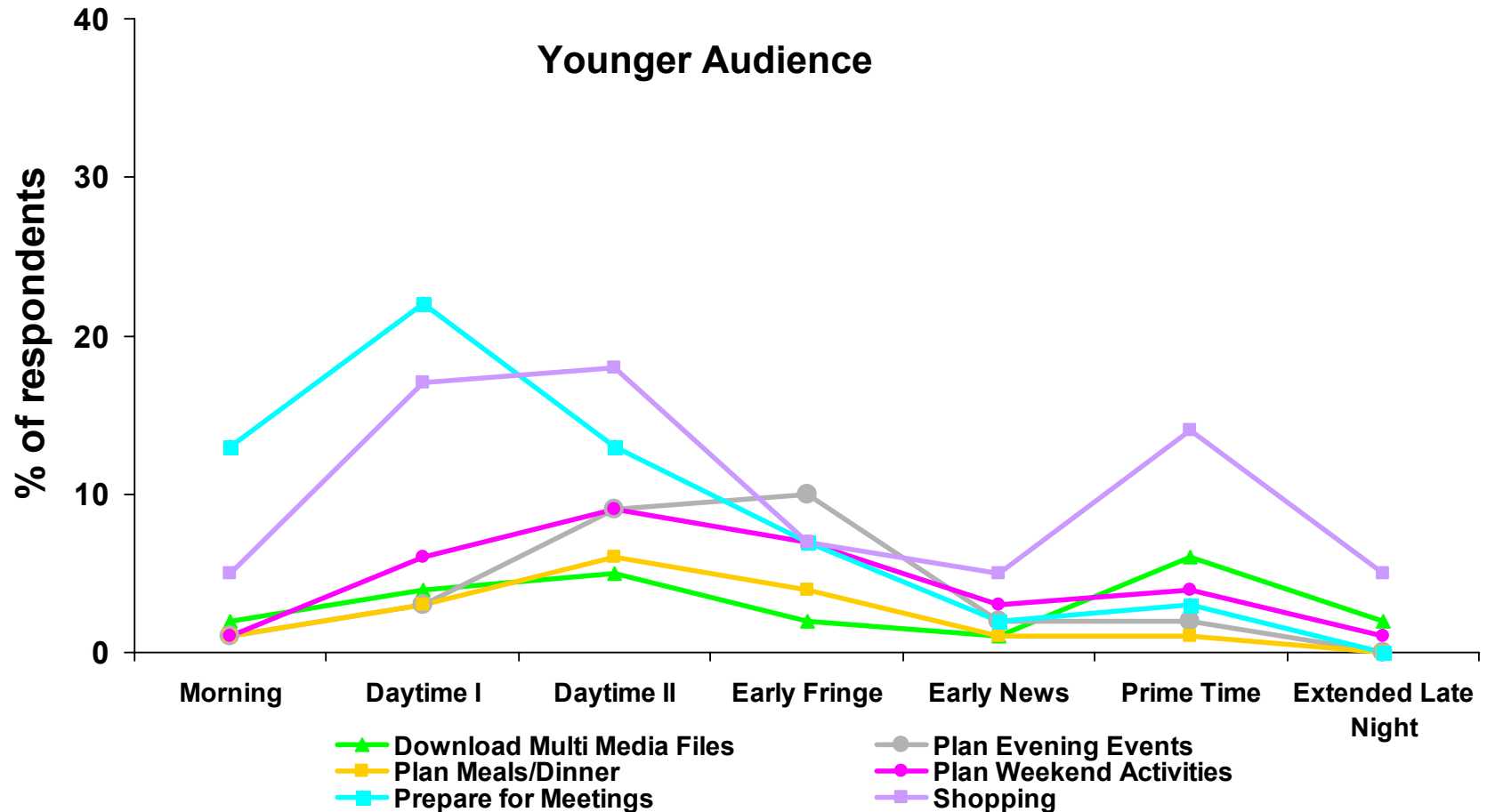
# 18 – 34 year olds show greater interest in general news than...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Younger (343)

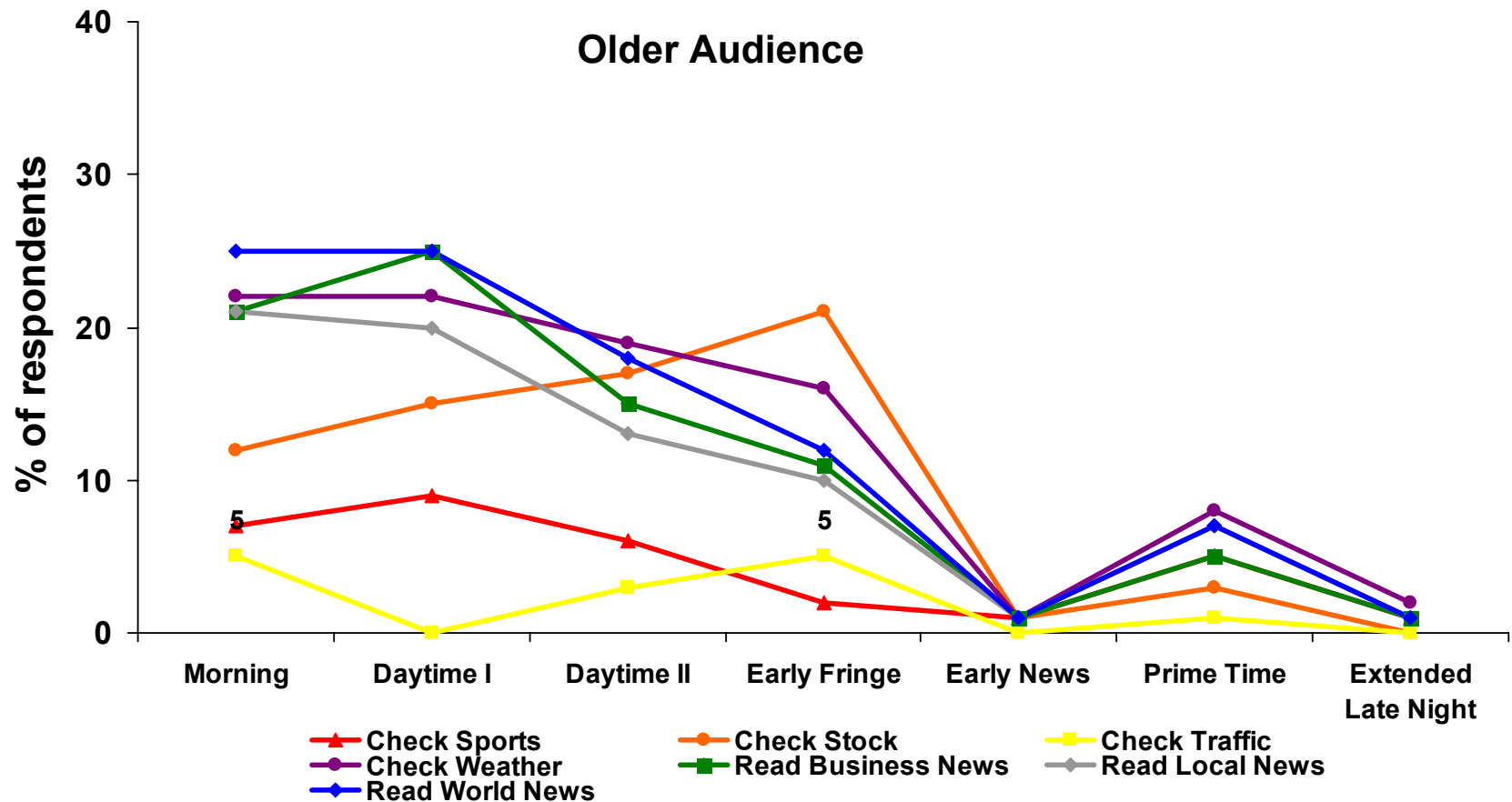
# ...business news, and are less likely to be shopping during the daytime



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Younger (343)

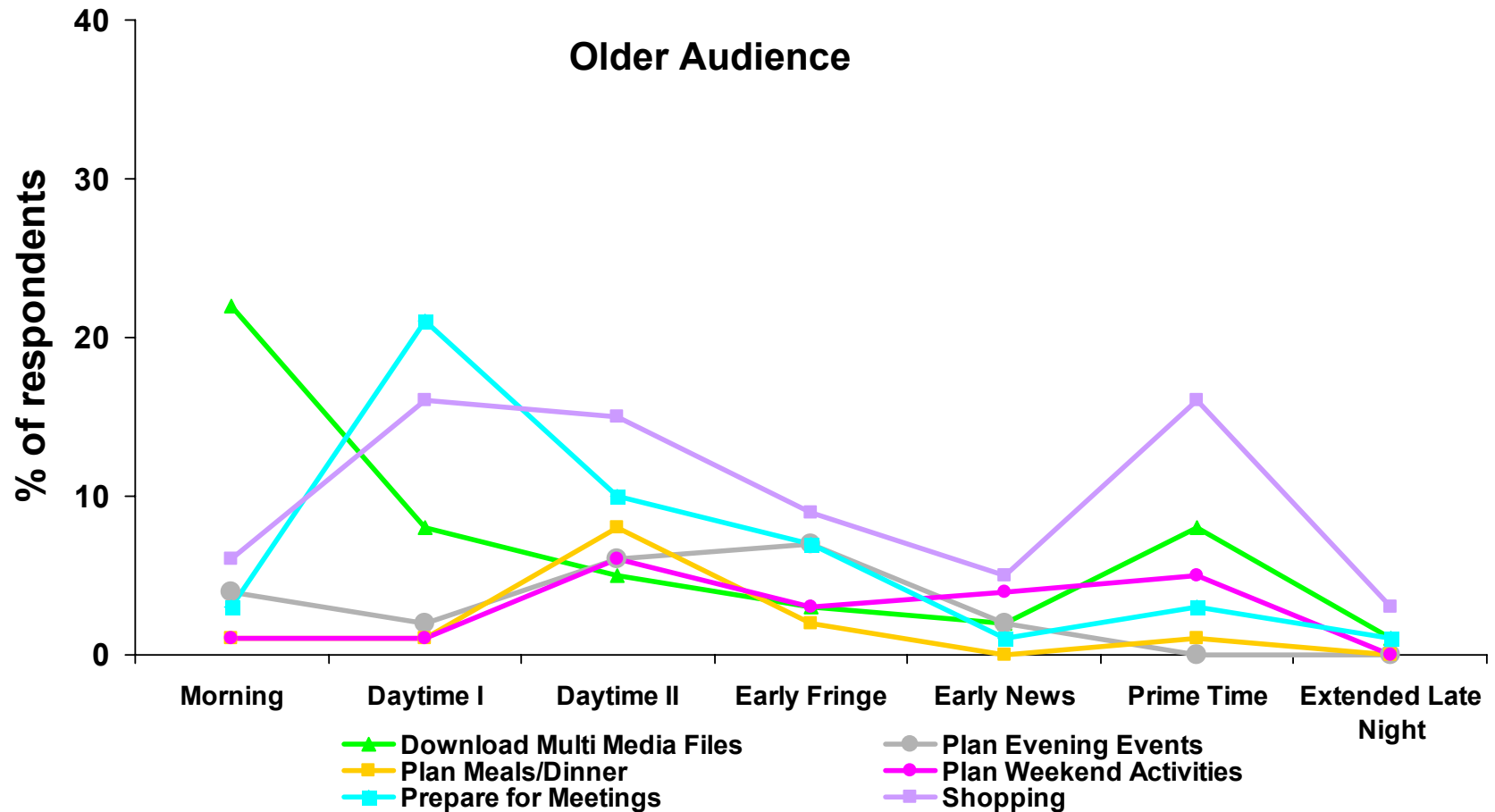
# Older adults are more apt to check stocks after the market closes...



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Older Audience (139)

# ... and look for entertainment (multimedia files) in the early a.m.



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: Older Audience (139)

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**The following charts illustrate  
the impact of “online tenure” on  
usage patterns and online  
activities among the At Work  
Audience**

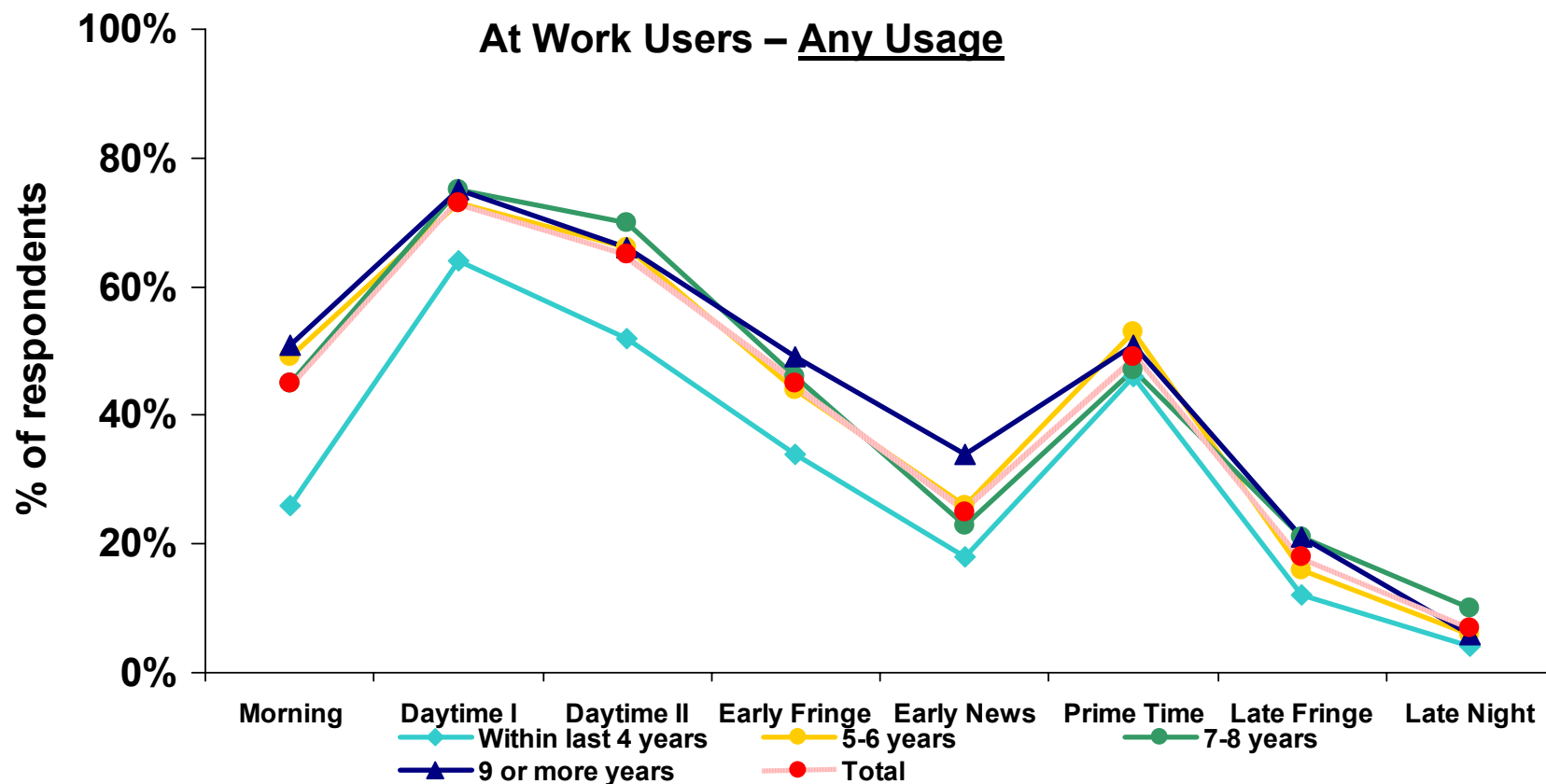


# Demographics by Online Tenure (length of time since first online)

At Work - When first online?					
	Total	Within 4 years	5 - 6 years	7 - 8 years	9 or more years
		% A	% B	C	% D
Male	50	28	46 A	52 A	61 ABC
Female	50	72 BCD	54 D	48 D	39
18-34	33	33	35	32	34
35-54	54	55	54	55	51
55+	13	13	11	12	15
Bachelors degree or higher	59	36	64 A	59 A	67 A
HH income \$75k plus	43	14	44 A	44 A	50 A
Accessed from work:					
Past 7 days	95	92	95	94	98 AC
Past day	75	66	77	76	79 A
Base: Total	(1053)	(86)	(255)	(236)	(282)

Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003  
A,B,C,D Tested at the 95% confidence interval.

# Online Tenure Analysis: Usage by Daypart

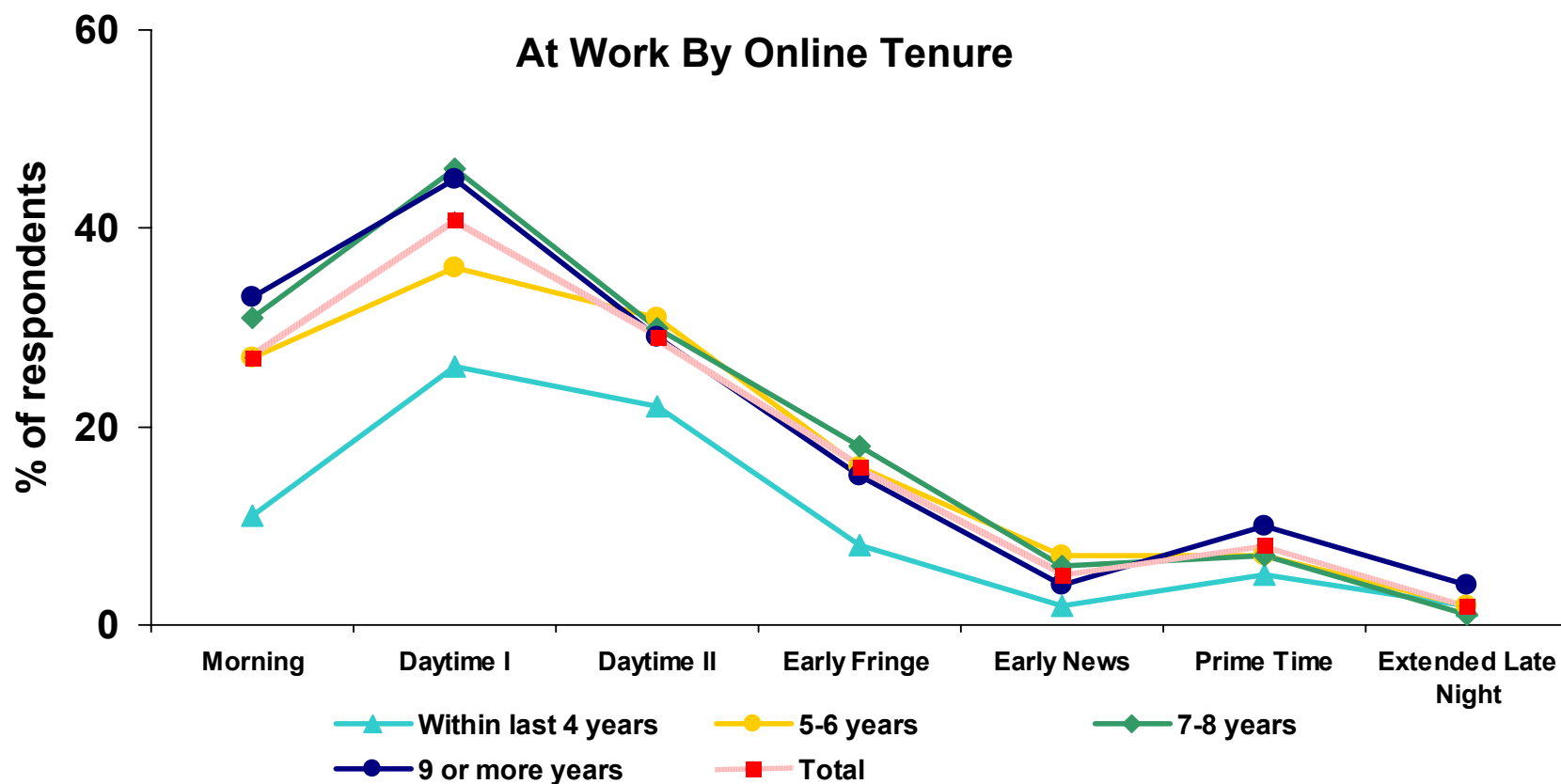


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M4-2/M1-2: How much time did you spend on the following <media> yesterday between <daypart>?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Read Any News" by Daypart

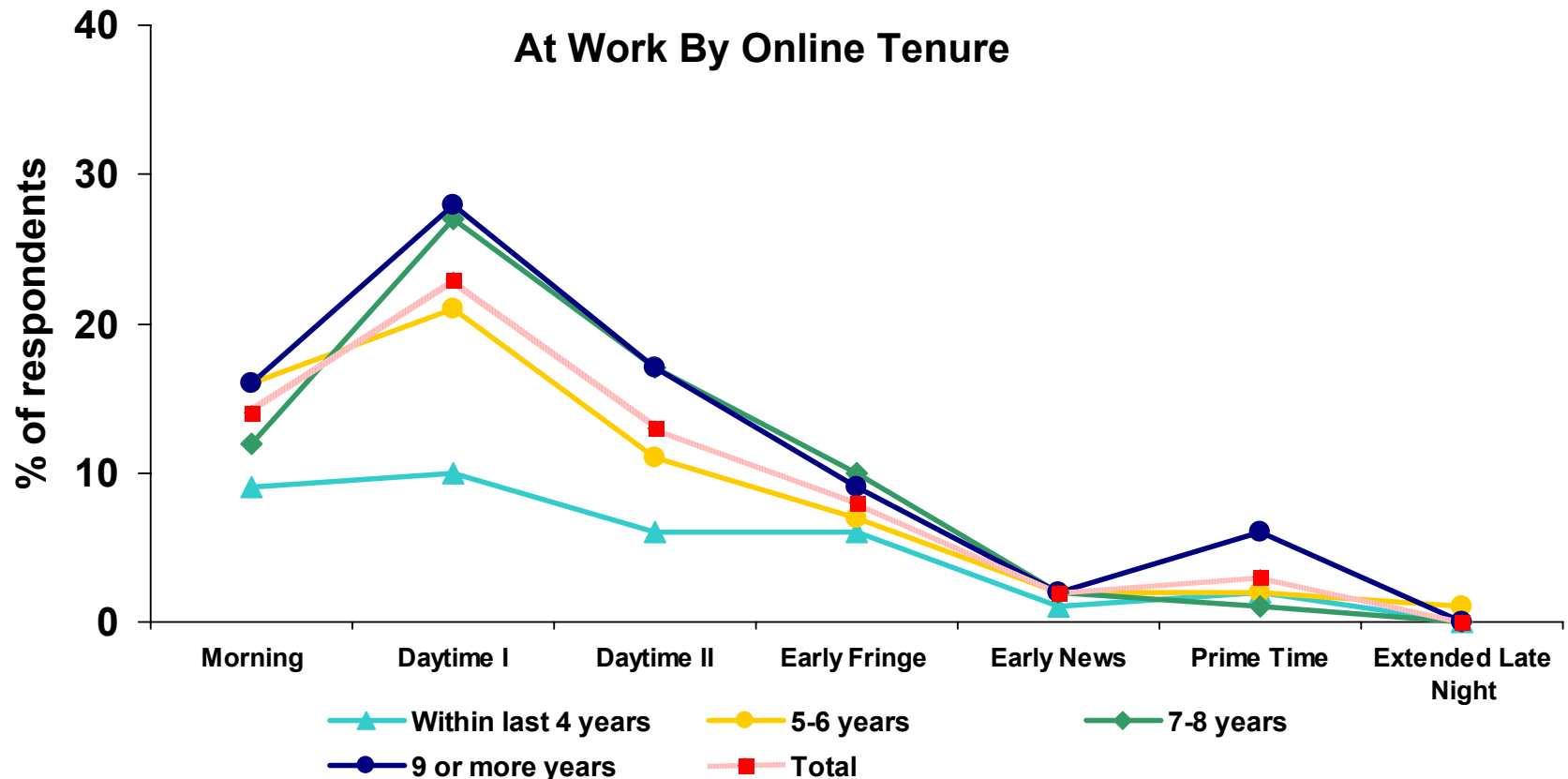


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Prepare for Meetings" by Daypart

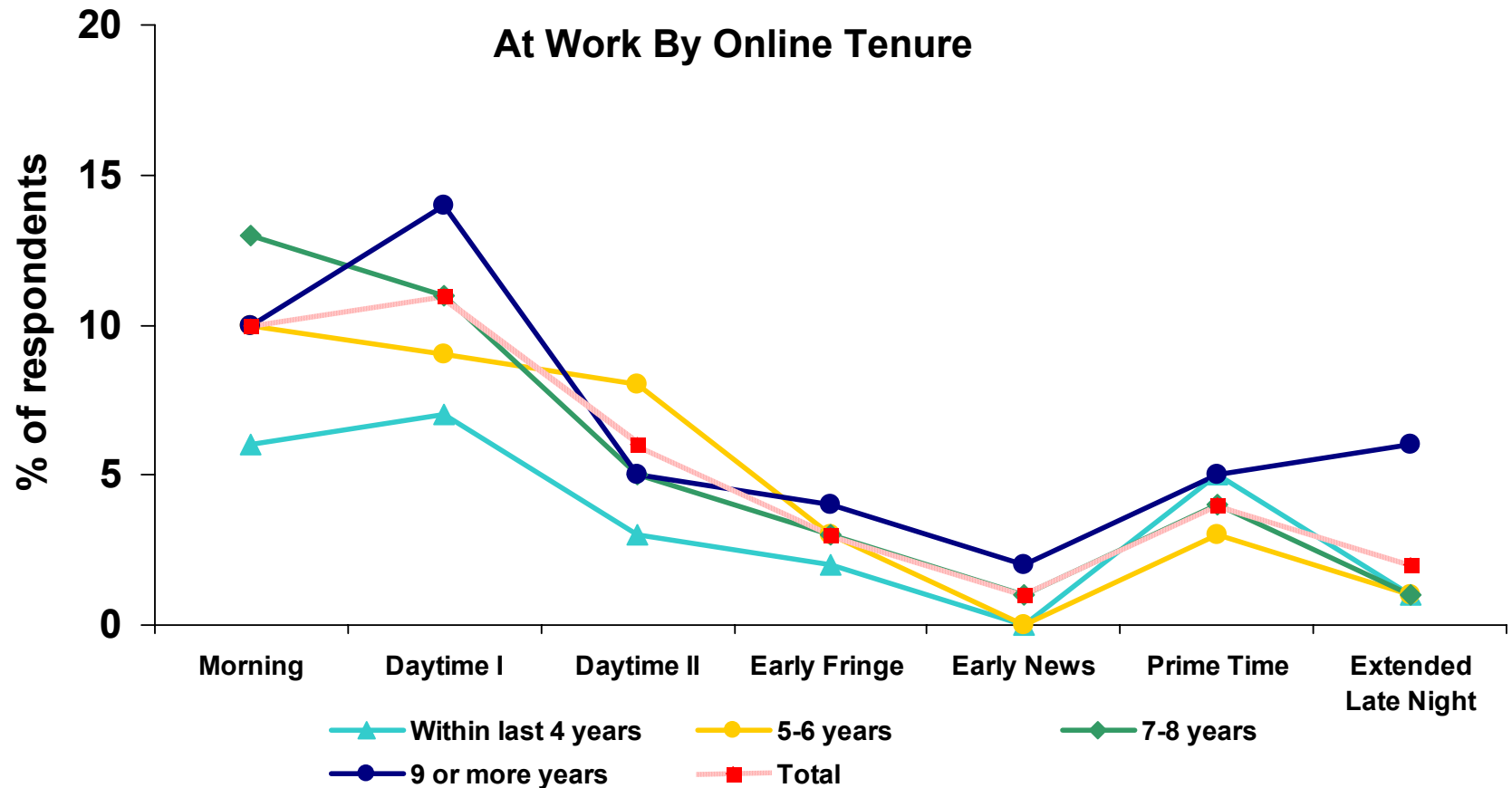


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Check Sports" by Daypart

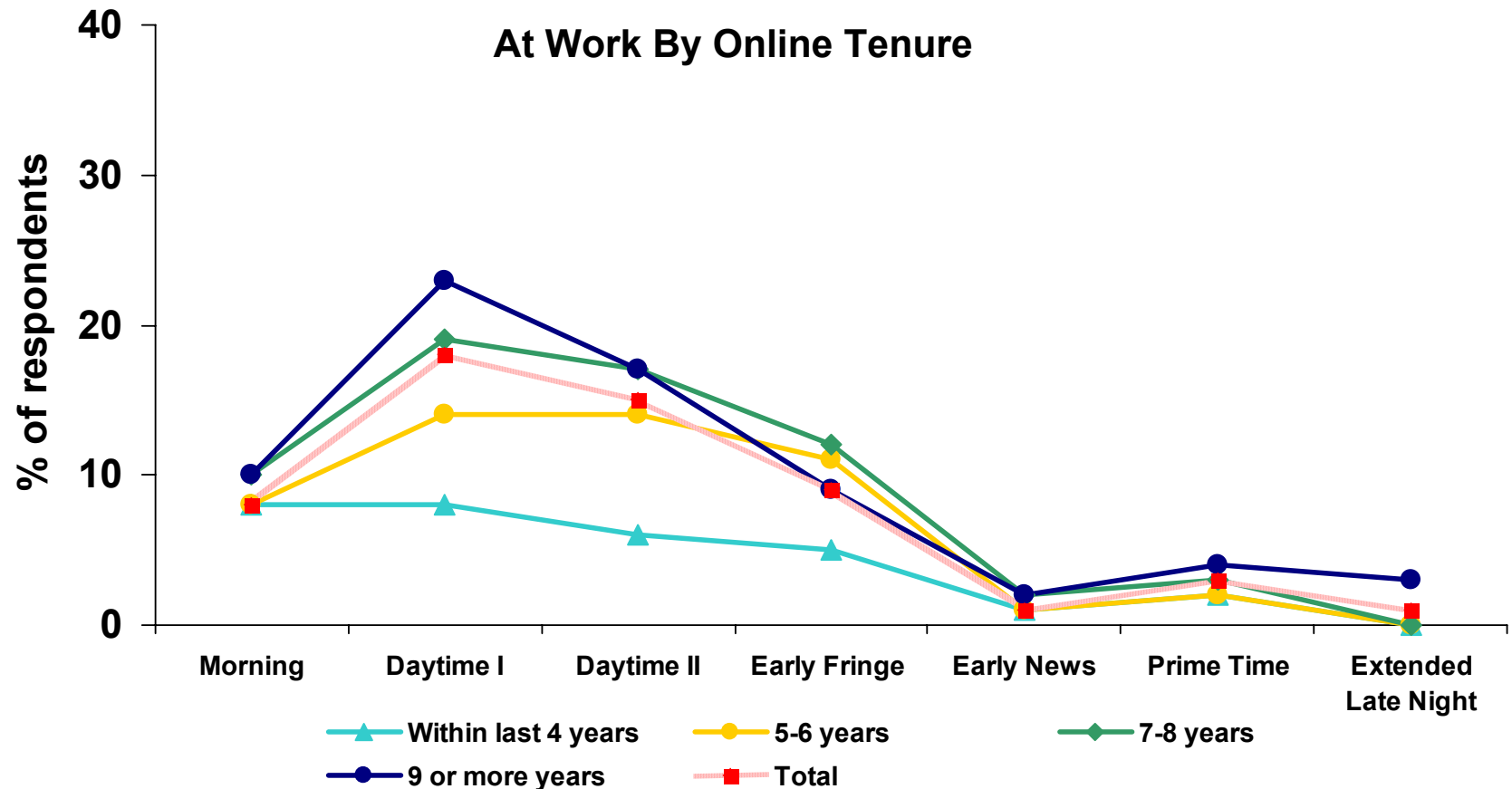


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Check Stocks" by Daypart

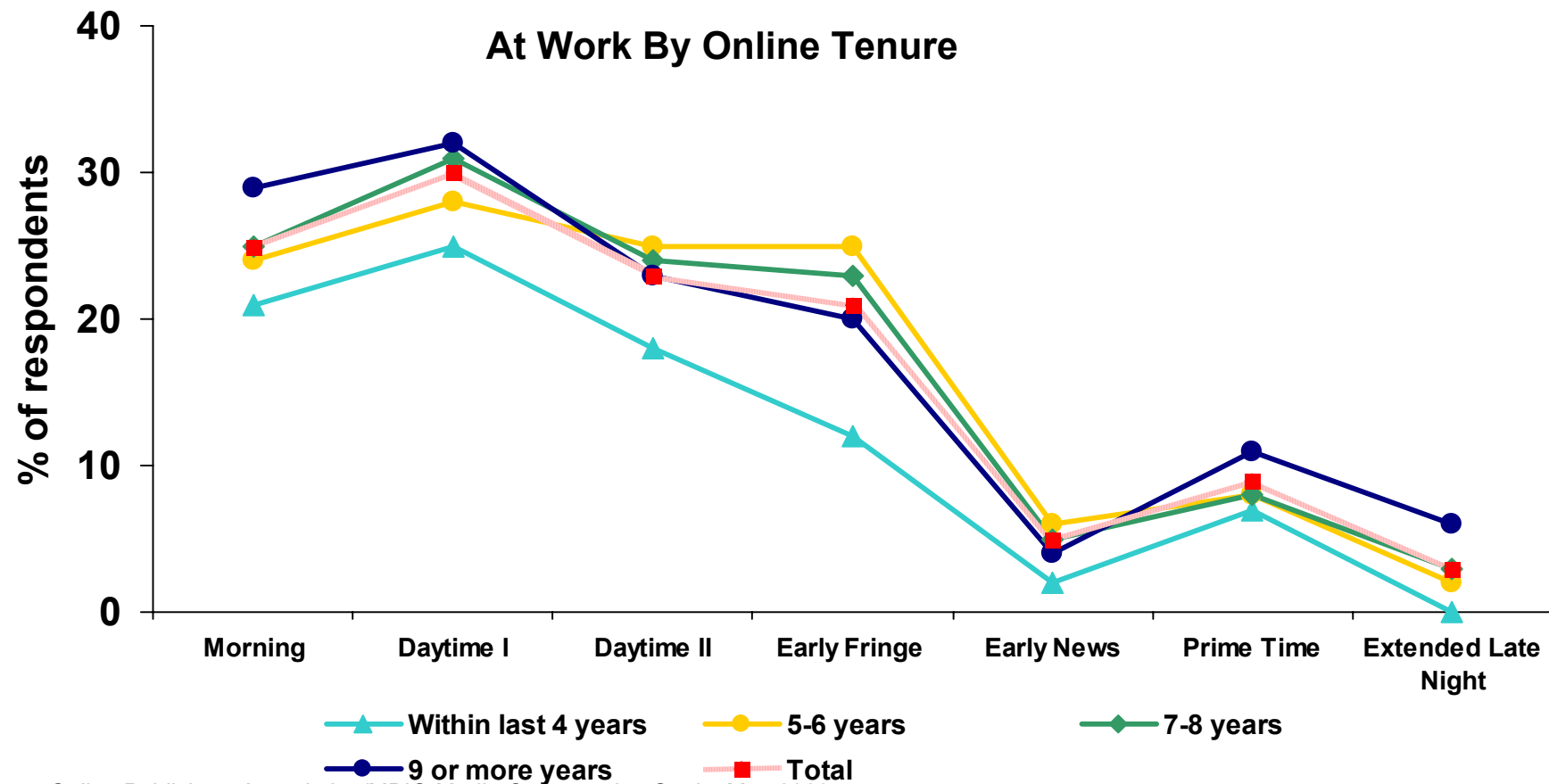


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Check Weather" by Daypart

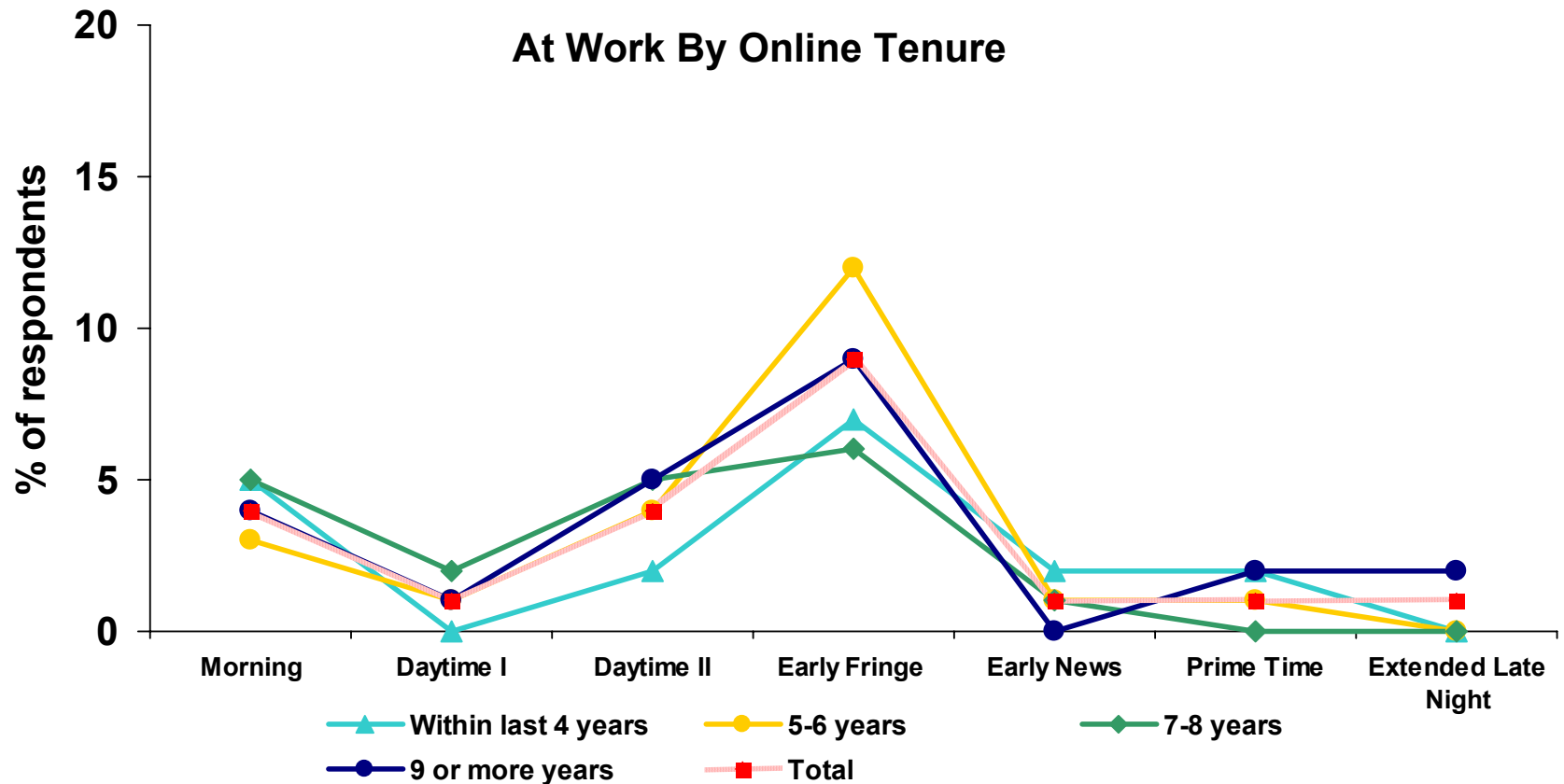


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Check Traffic" by Daypart



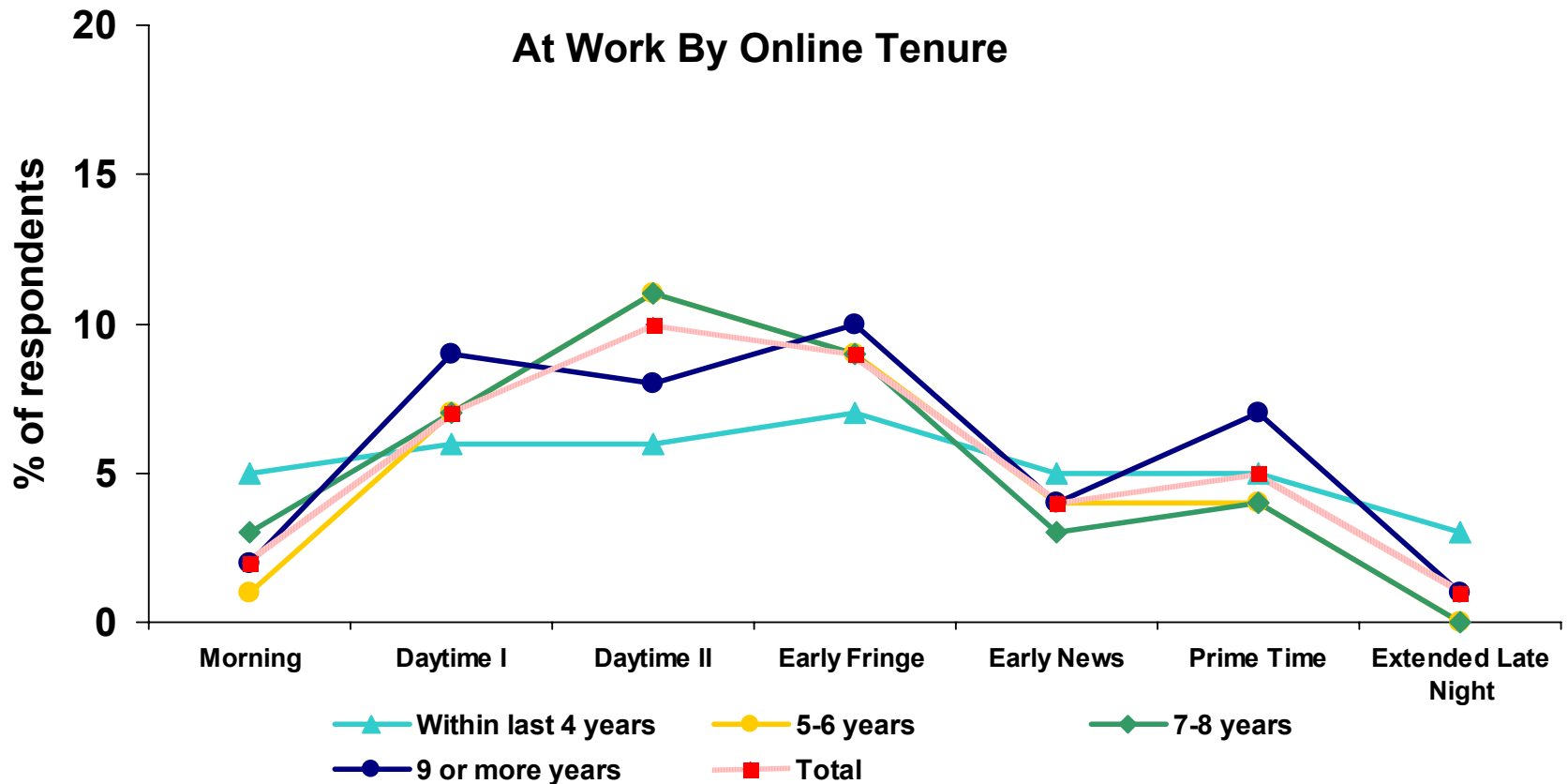
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)



# Online Tenure Analysis: "Plan Weekend Activities" by Daypart

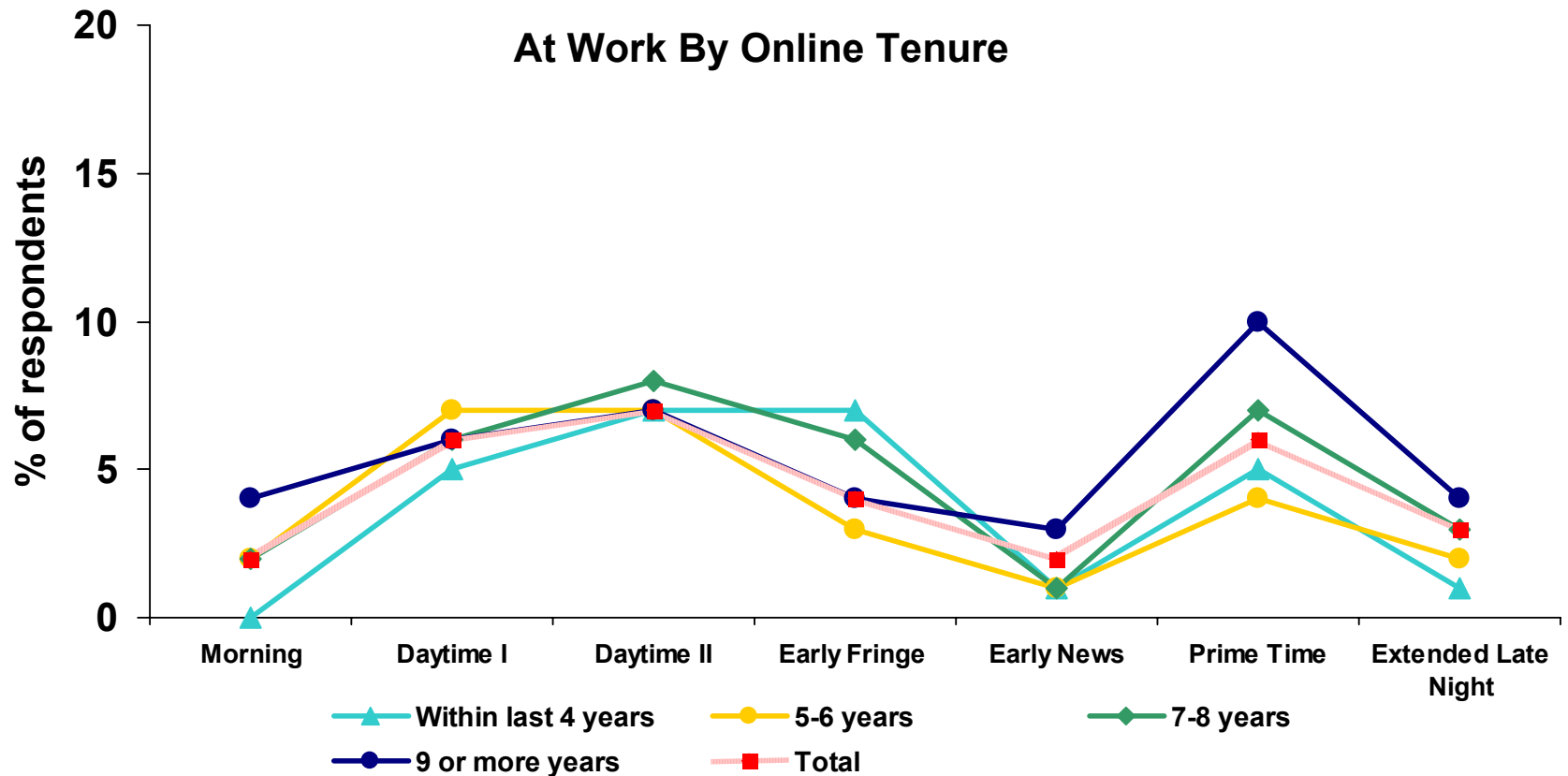


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: "Download Multimedia Files" by Daypart

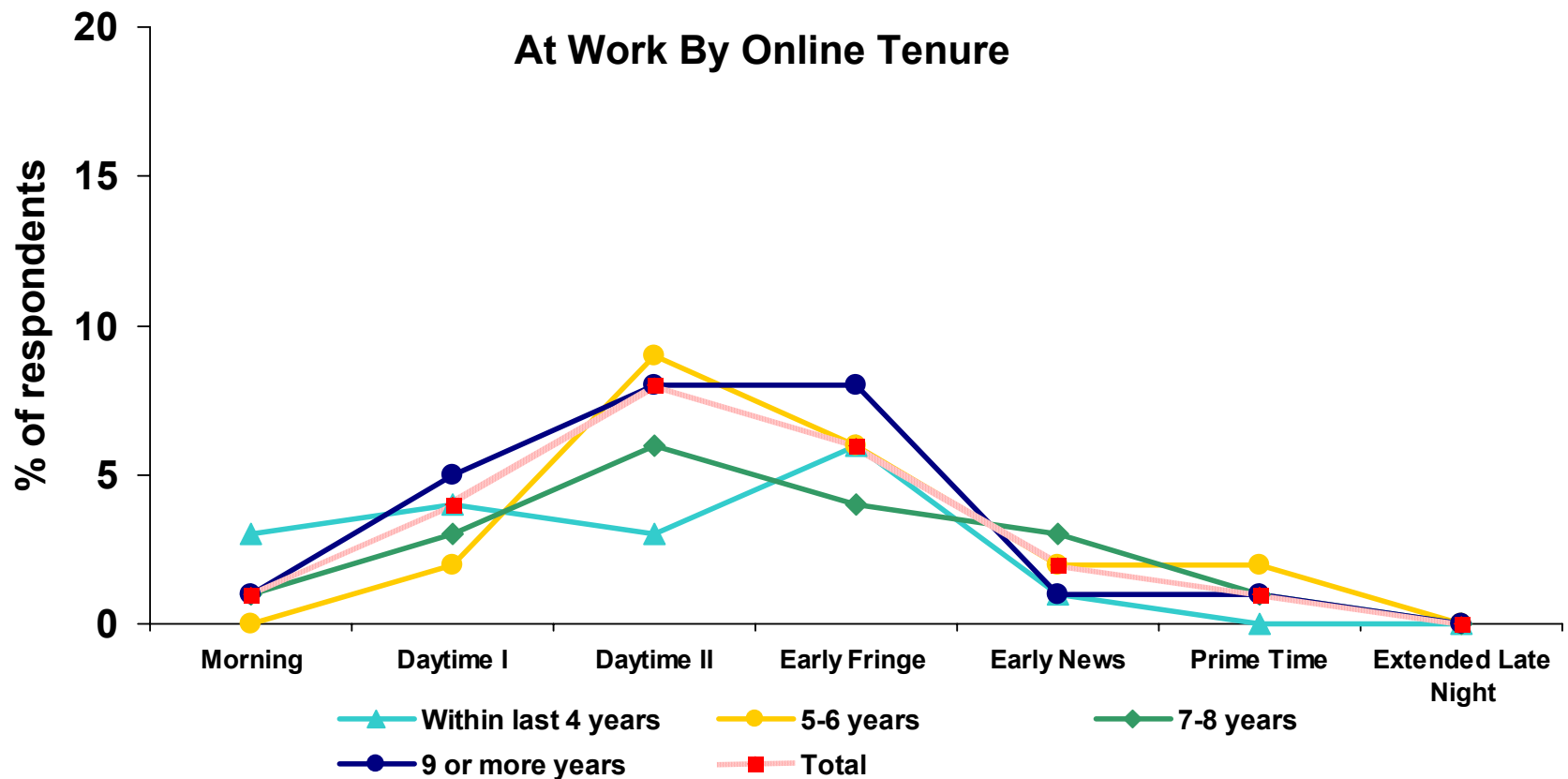


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Plan Meals/Dinner" by Daypart

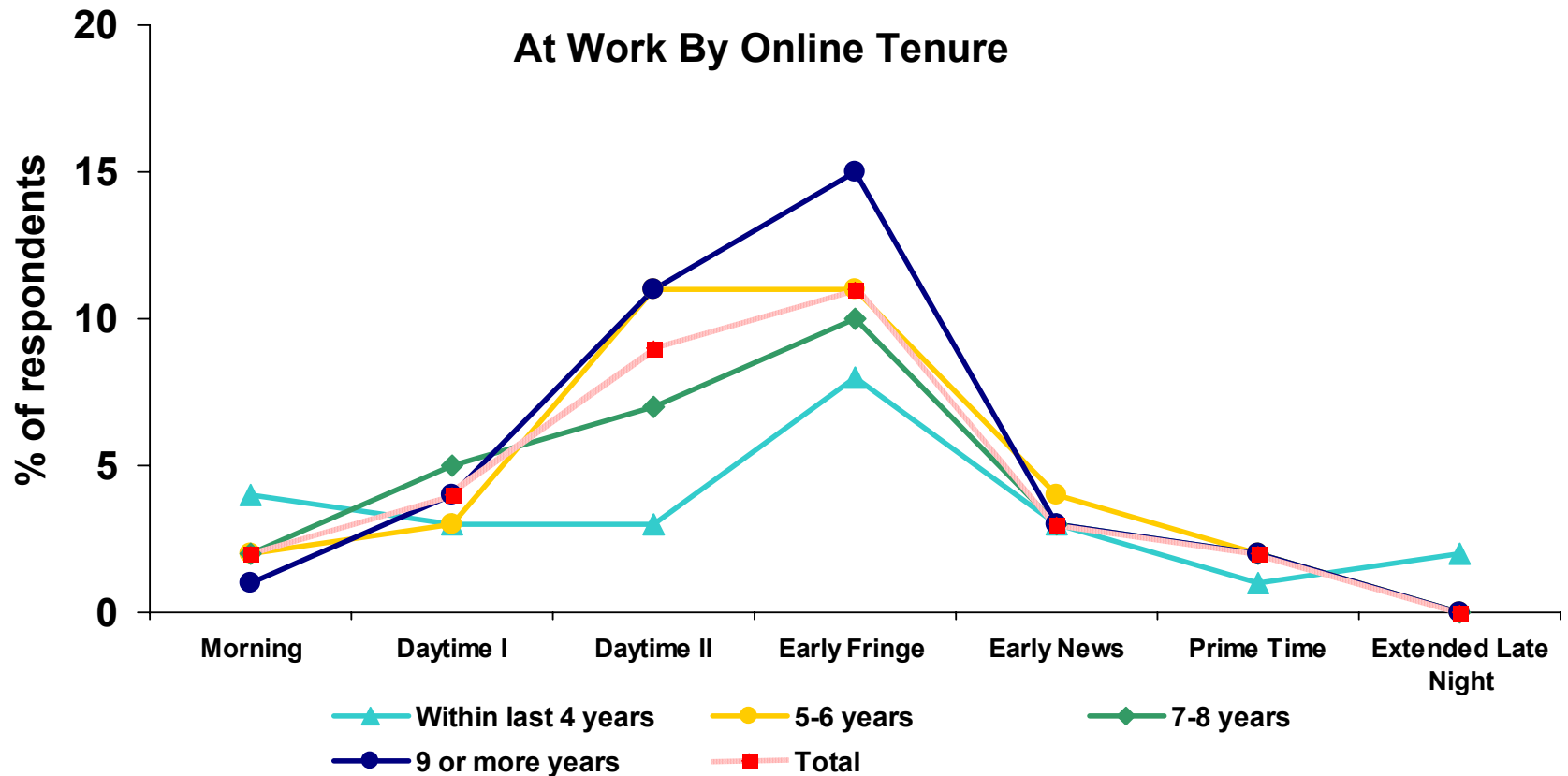


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Plan Evening Events" by Daypart

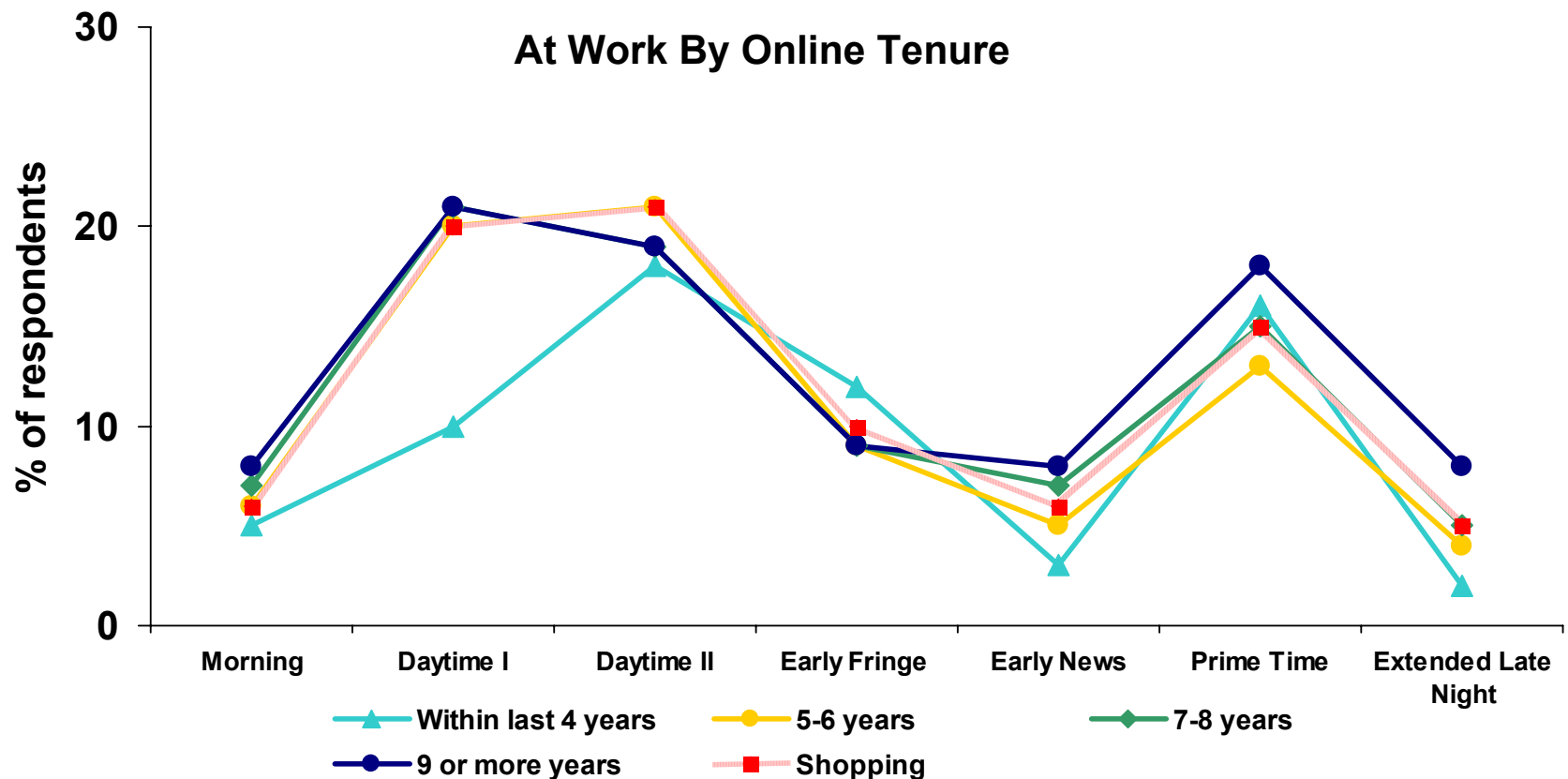


Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

# Online Tenure Analysis: Activity "Shopping" by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

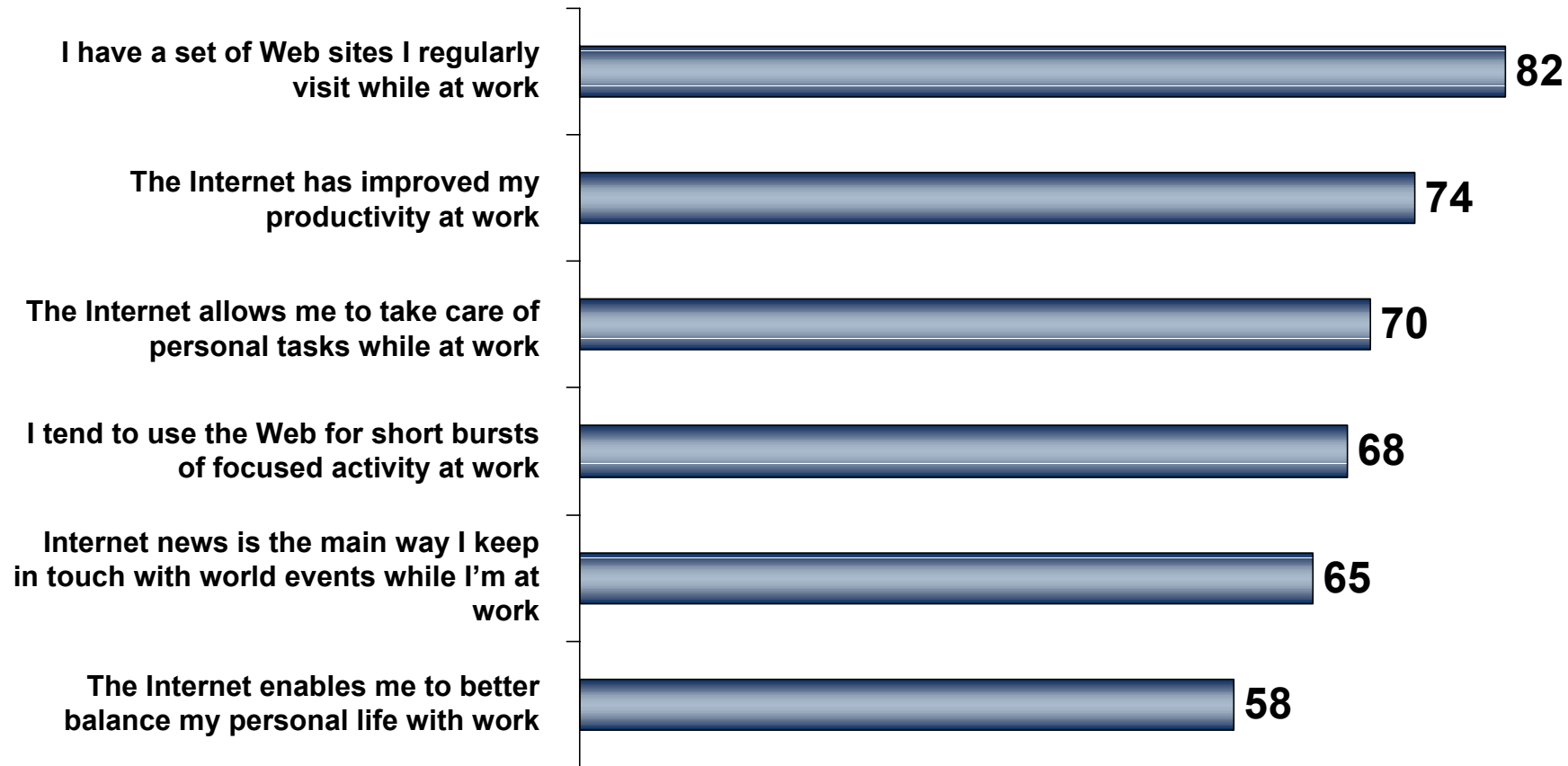
Q10a: Thinking about the times of day you use the Internet during the work week, when do you typically use the Internet for any of the following?

Base: At Work – Total (1053), Within last 4 years (86), 5-6 years (255), 7-8 years (236), 9 or more years (282)

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# Internet Attitudes of the At Work population

# Attitudes toward the Internet (Top 2 Box Scores)



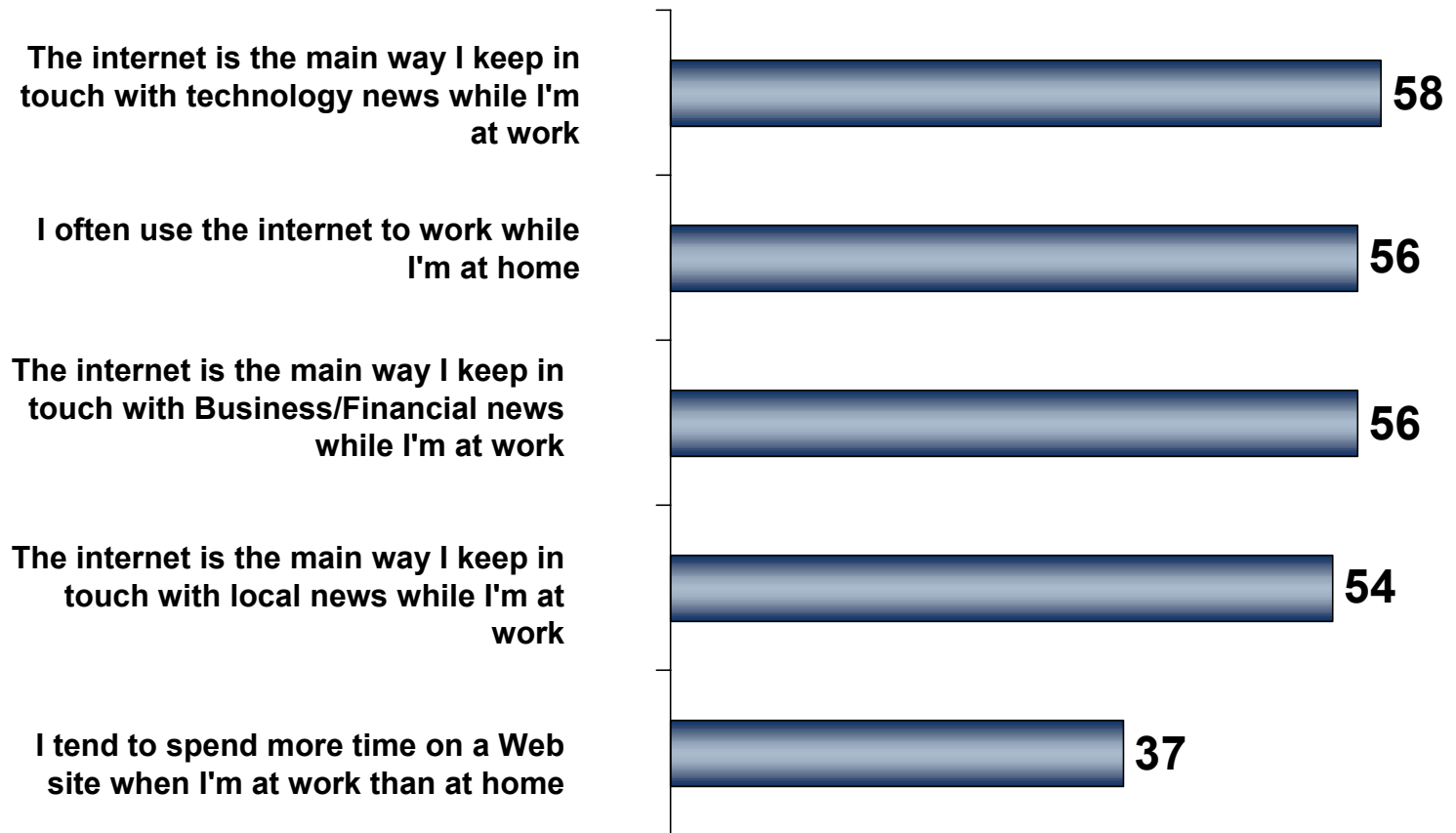
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

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

Base: 2001 At Work (755), 2003 At Work (1053)

# Attitudes toward the Internet (cont.)

## (Top 2 Box Scores)



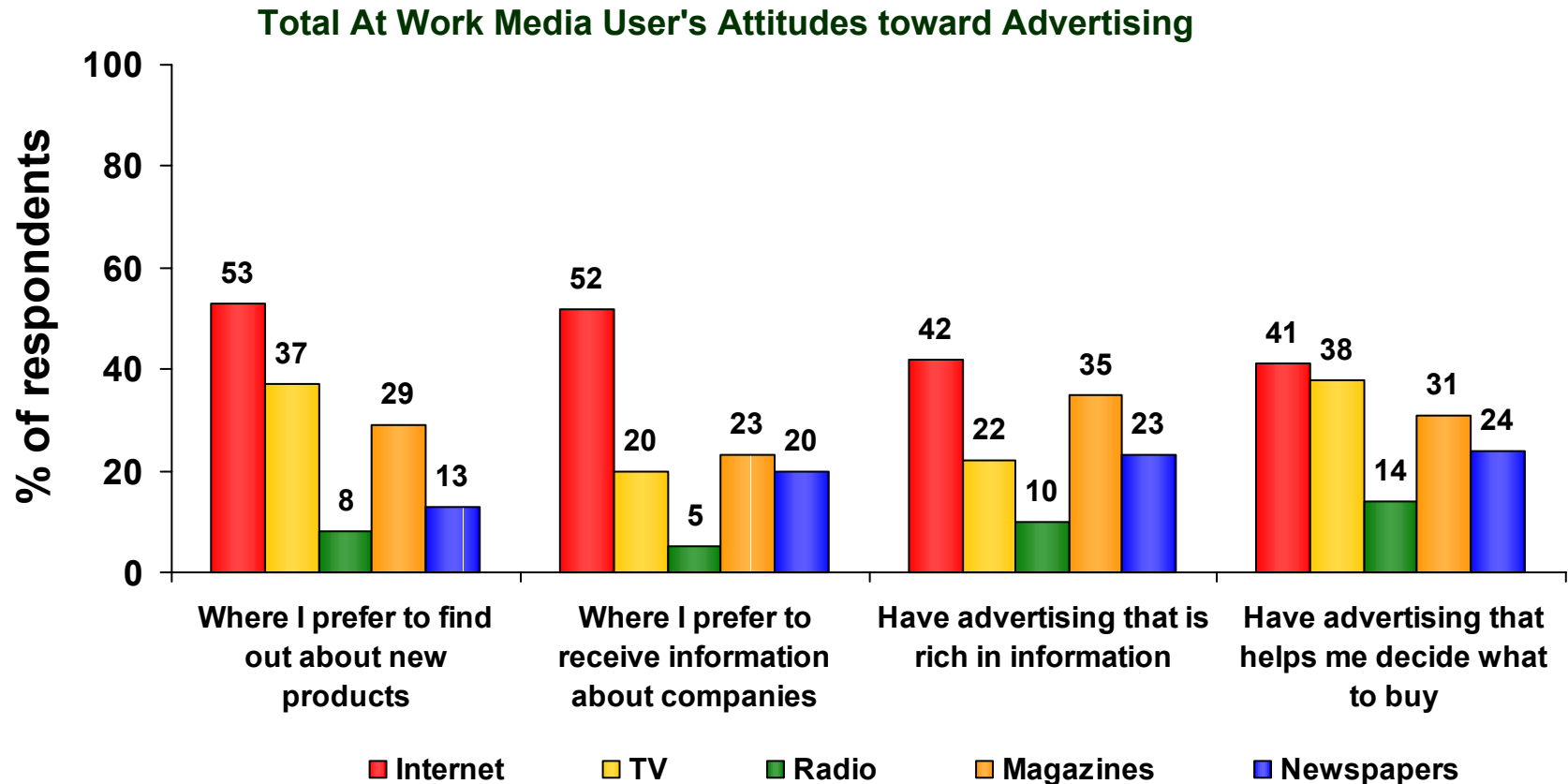
Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 10: Please indicate your agreement with the following statements related to your use of the Internet while at work. Base: 2003 At Work (1053)

Note: These attributes asked only in 2003.



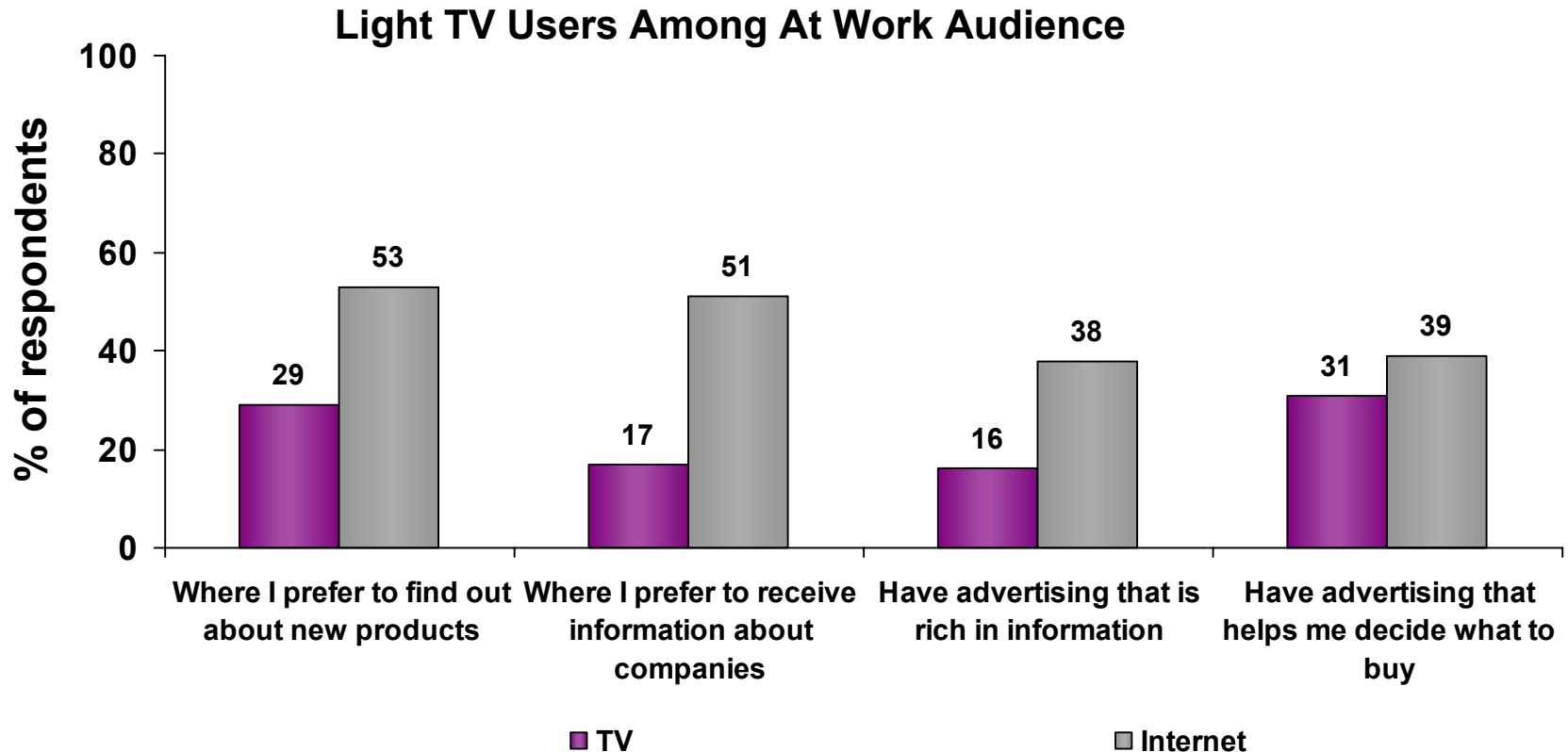
# At Work Users believe Internet advertising has unique values



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

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 (1053)

# Light TV Viewers' Attitudes toward TV and Internet Advertising



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

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 - Light TV (327)

Light TV Viewers (36% of the At Work audience) is defined as those who view less than 2 hrs 15 minutes of television per day during the work week

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# Appendix

# Definition of Daypart Segments

## EASTERN & PACIFIC / CENTRAL & MOUNTAIN

6am-9am / 5am-8am

9am-1pm / 8am-12pm

1pm-4:30pm / 12pm-3:30pm

4:30pm-6pm / 3:30pm-5pm

6pm-7pm / 5pm-6pm

7pm-11pm / 6pm-10pm

11pm-1am / 10pm-12am

1am-6am / 12am-5am

## DAY PART

Morning

Daytime I

Daytime II

Early Fringe

Early News

Prime Time

Late Fringe

Late Night

# Methodology & Fieldwork

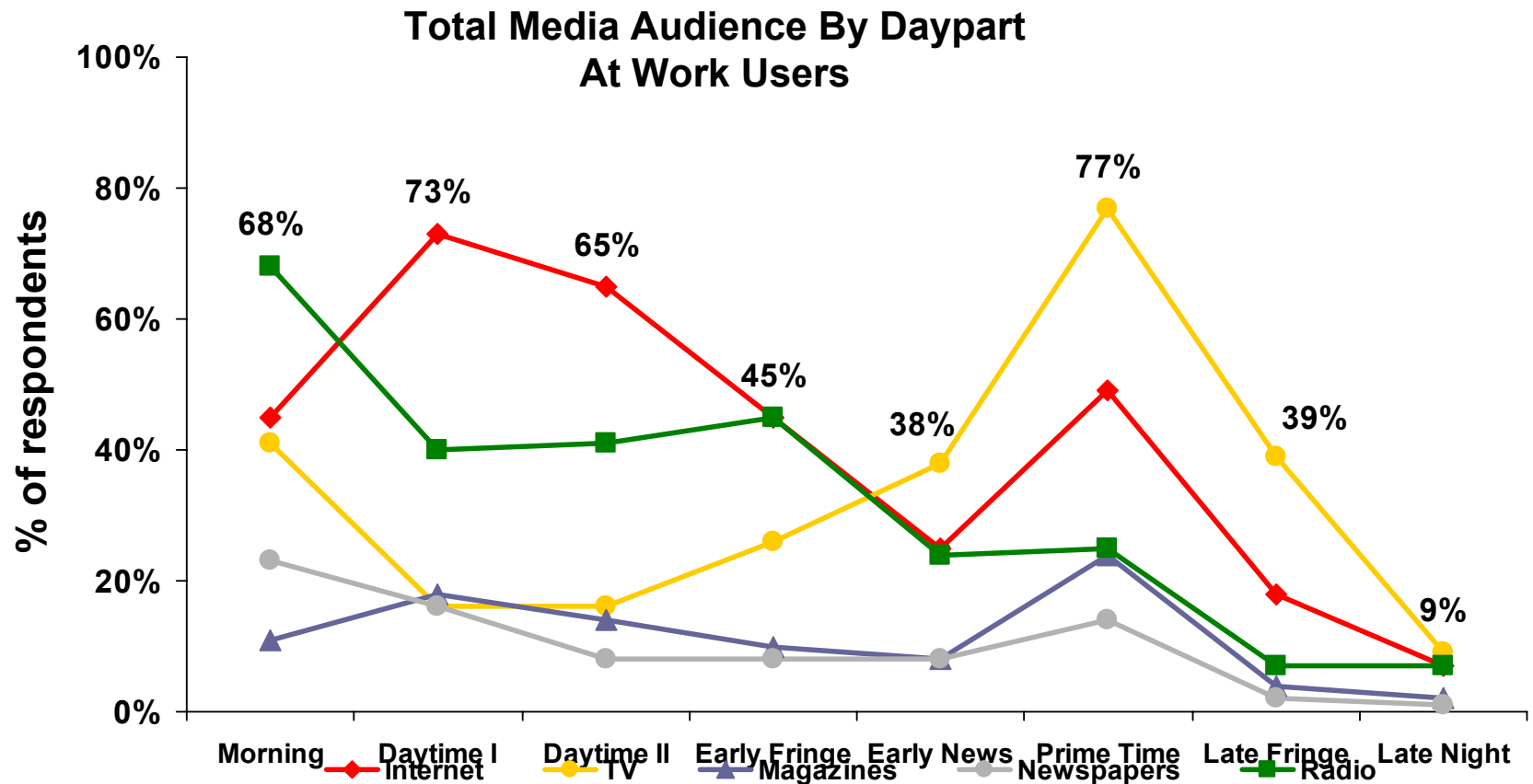
- The study and questionnaire were designed to be consistent with the original 2001 study.
  - A nationally representative sample of Lightspeed web panelists were invited to participate in the study from Tuesday, January 14, to Saturday, January 25, 2003.
  - Interviews were conducted between Tuesday-Saturday to ask about weekday media consumption from the previous day.
    - Sample recruiting via e-mail took place throughout the day.
    - Quotas were imposed to obtain an equal distribution of respondents on a daily basis

# Methodology & Fieldwork (cont'd)

- Weighting was later applied to the data in order to guarantee a sample representative of the US Internet population and remove respondent biases.

	<u>Unweighted</u> <u>Bases</u>	<u>Weighted</u> <u>Bases</u>
At-Work Internet Audience	1,026	1,053
Non-Work Internet Audience	387	363

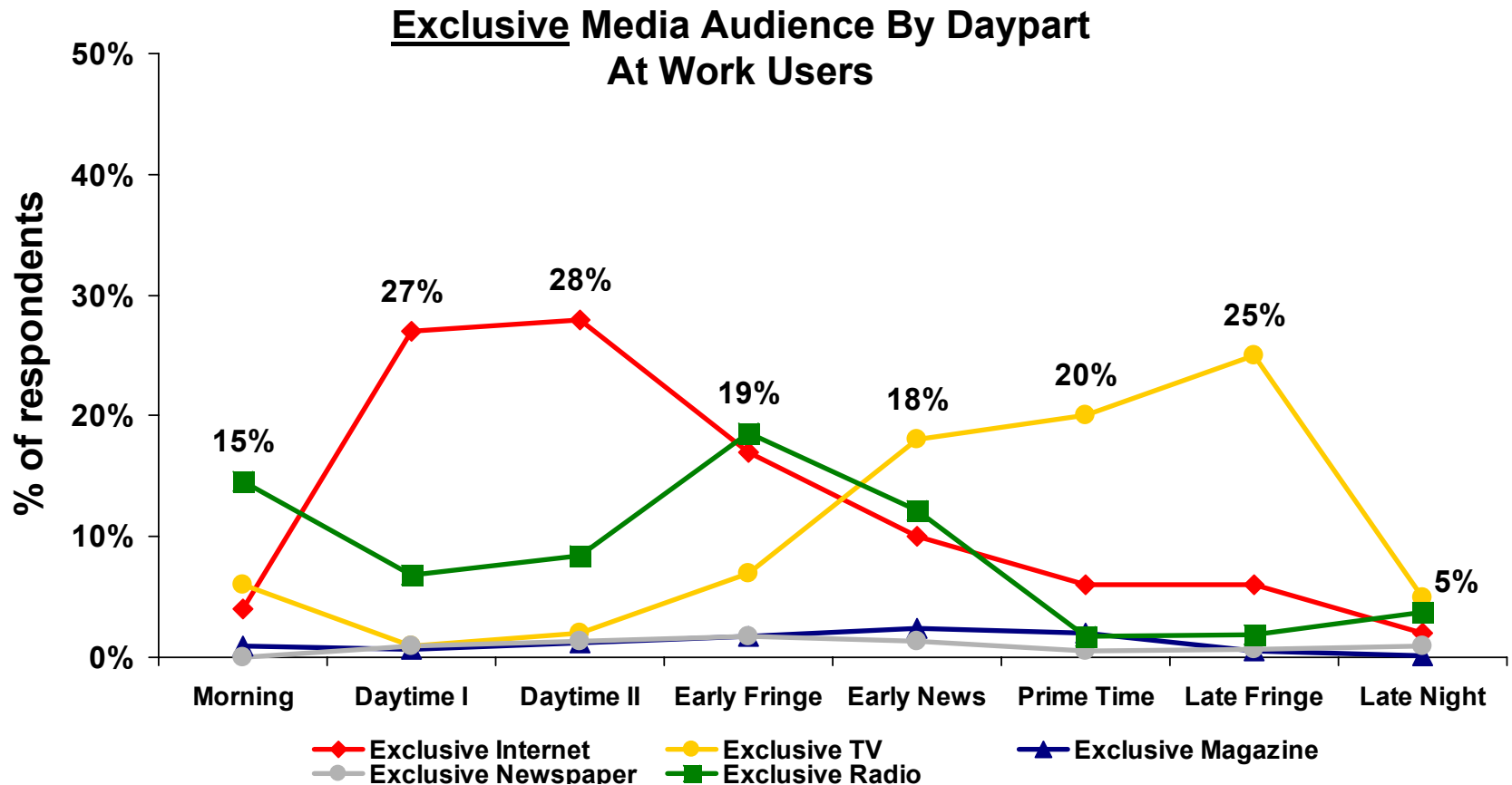
# Total Media Audience by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: At Work (1053)

# Exclusive Media Audience by Daypart



Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. M1-2/M2-2/M2-5b/M3-2/M4-2: How much time did you spend on the following <media> yesterday between <daypart>? Base: At Work (755)



# Sites Visited in a Typical Seven-day Week

	At Work Total	Male At Work	Female At Work
	%	% A	% B
News	62	67 B	57
Weather	58	61	56
Financial Services	43	54 B	33
Retail shopping	40	34	47 A
Educational	40	39	42
Games	39	33	46 A
Special interest/hobbies	38	41	35
Personal entertainment planning	35	30	39 A
Computer/software	34	51 B	18
Travel related	32	33	31
Online auctions	27	33 B	21
Food/cooking	27	18	37 A
Music	26	28	25
Job listings	26	24	27
Health/fitness	26	21	32 A
<b>Base: At Work</b>	<b>(1053)</b>	<b>(526)</b>	<b>(527)</b>

Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 3: Which types of web sites do you typically visit in an average 7-day week? A/B = Significantly different at the 95% confidence level.

# Sites Visited in a Typical Seven-day Week (cont'd)

	At Work Total	Male At Work	Female At Work
	%	% A	% B
Sports	25	37 B	13
Personal/home electronics	21	29 B	13
Ticketing services	19	19	20
Classified	18	18	18
Home improvement	18	19	18
Community/local message boards	17	19	16
Popular culture	15	16	15
Radio stations	15	18 B	12
Real Estate	12	11	13
Automobile	12	17 B	7
Parenting	11	4	18 B
Personal/dating services	8	11 C	4
Base: At Work	(1053)	(526)	(527)

Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

Q. 3: Which types of web sites do you typically visit in an average 7-day week? A/B = Significantly different at the 95% confidence level.

# Profiles of News and Information Site Users

## Profile of At Work Users Among Top Genres Used in Typical Week

	At Work Total	News	Weather	Financial Services	Computer/ Software	Travel- related	Sports
<b><u>Gender</u></b>							
Male	50	54	52	62	74	52	74
Female	50	46	48	38	26	48	26
<b><u>Age</u></b>							
18-34	33	30	27	29	26	27	25
35-54	54	56	61	58	58	61	62
55+	13	14	12	13	17	12	13
Highly Educated	59	62	57	63	57	62	61
Affluent	43	46	45	51	45	52	50
Top-Level Professionals	21	22	22	27	29	22	27
Working Mothers	21	19	19	16	12	17	8
<b>Base: At Work</b>	<b>(1053)</b>	<b>(652)</b>	<b>(614)</b>	<b>(458)</b>	<b>(362)</b>	<b>(332)</b>	<b>(263)</b>

Source: Online Publishers Association/MBIQ Media Consumption Study, May 2003

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