

Washingtonpost . Newsweek **Interactive**



Working Women Online

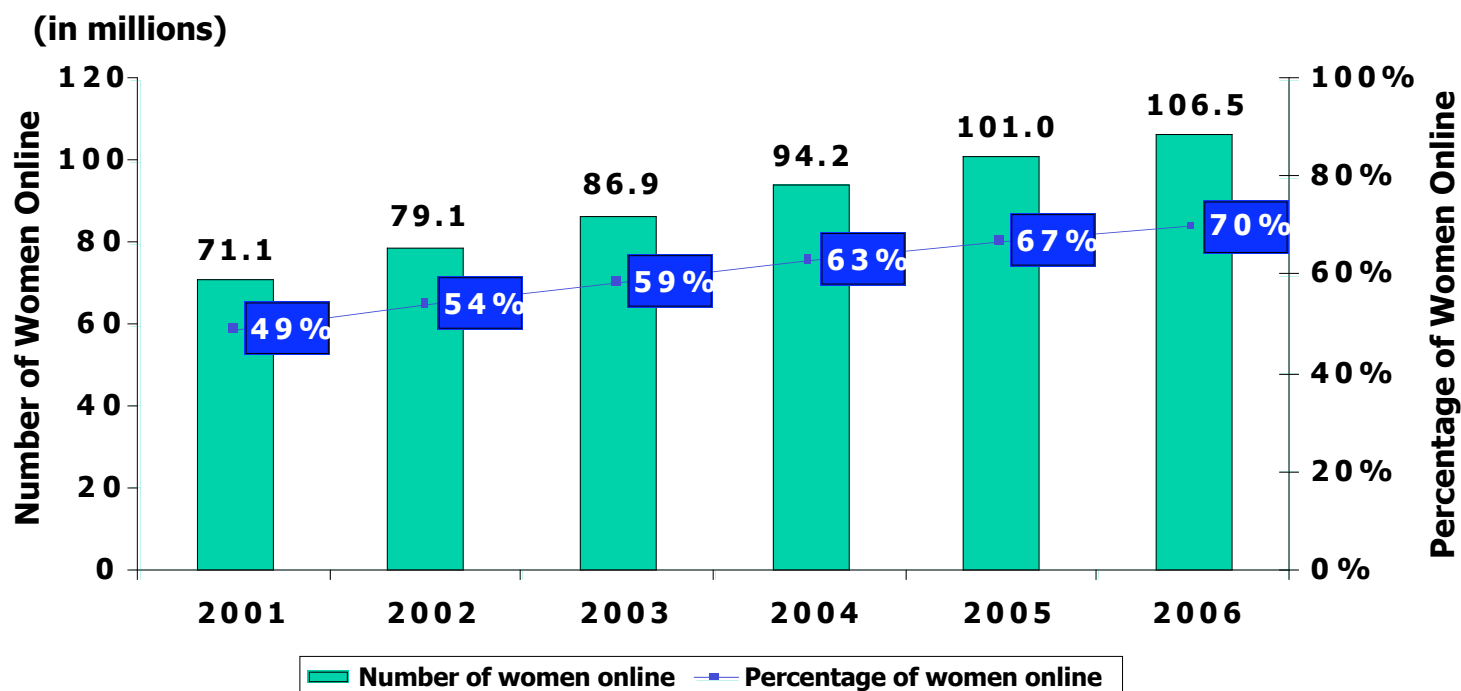
*Media Usage and Purchasing Habits of
Online Working Women*

Nielsen//NetRatings

washingtonpost.com

Background

- Jupiter Research estimates that 70% of all women in the U.S. (over 106 million) will be online by 2006. Currently there are more women online than men overall, with women accounting for about 51% of the total online adult population.*
 - According to Nielsen//NetRatings @plan, over half of all women who use the Web access from work**



* "Demographic Profile: Women Online," Jupiter Research 2004

** Nielsen//NetRatings @plan, Winter 2004

Methodology

- A multi-source (Random Digit Dial and online) recruited panel was used to field the email survey between 2/3/2004 and 2/10/2004.
 - Nielsen//NetRatings provided access to purchased sample and data collection services.
- Responses from 825 women and 226 men who regularly access the Internet from work were analyzed.
 - 1,111 respondents who did not access the Internet regularly from work were removed from the sample.
- Data analysis performed and results compiled by Nielsen//NetRatings and washingtonpost.com.

Key Findings

- Nearly seven in ten online working women with children feel they do not have enough time for their personal lives. Six in ten online working women overall feel that way. (Fewer than half of online working men say they do not have enough time).
- Despite their lack of free time, online working women are heavy consumers of Television, The Internet, and Radio programming. 60% spend more than 1 hour per day online.
- About half of online working women have increased their use of the Internet in the past year – far ahead of any other media. At the same time, one-quarter of online working women are *decreasing* their time with TV, magazines, and print newspapers.
- When looking to save time, the Internet and radio are least likely to be removed from the online working women's routine.
- The Web has become a key component of all purchase decisions, whether the transactions occur online or offline. Nearly 90% of online working women say they "conduct more product research online than they would be able to offline."

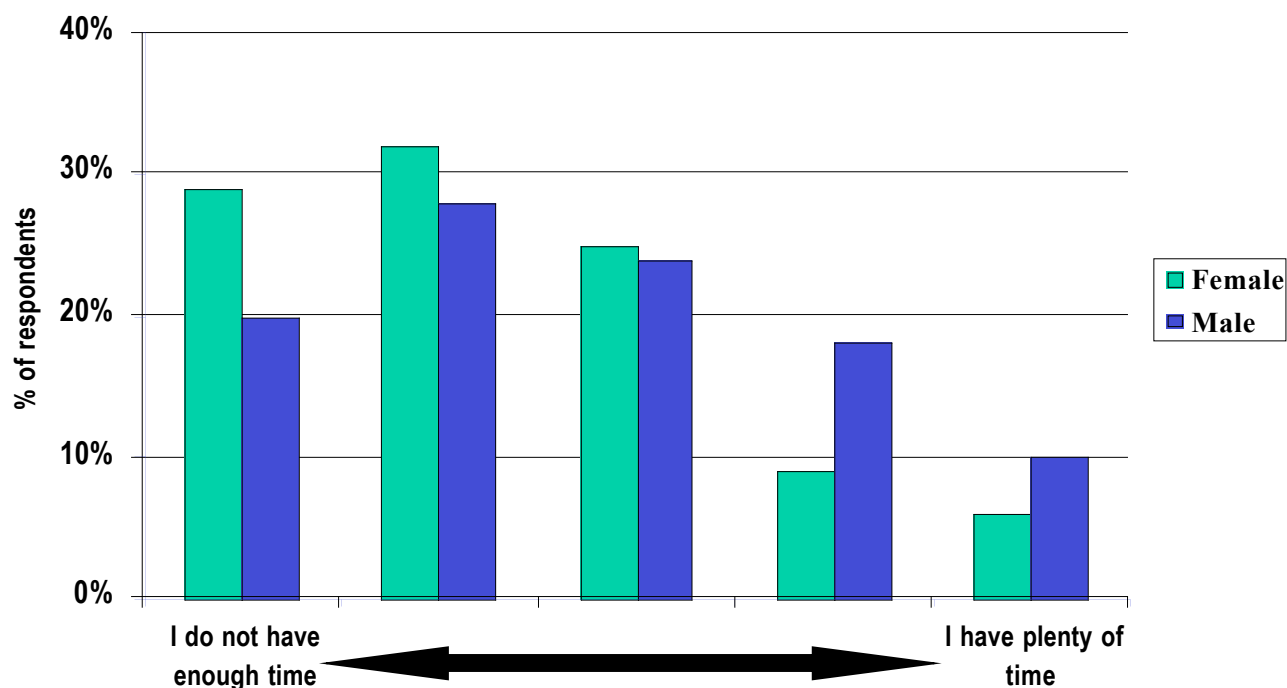
How the Internet Helps Balance Personal and Professional Lives

(actual quotes taken from open-ended survey question 'How does the Internet help you balance your personal and professional life?')

- "Balance...merge might be a better word. The Internet has made my personal and professional life one in the same."
- "The Internet is essential to both my personal and professional life. I routinely search for ideas, entertainment, education, and financial things online. I feel lost or disconnected when I am without Net access."
- "I perform as many transactions as possible online to replace needing to take time off during working hours or wasting time on errands on the weekends."
- "Obtaining a personal and professional balance in life is essential to a happier YOU! With the Internet at my fingertips, I am able to accomplish multitasking personal and work related items easily, communicate effectively in a timely manner with co-workers and family, set up appointments, and research all within a fraction of the time it took before. The Internet is a basic instrument, not a luxury item."

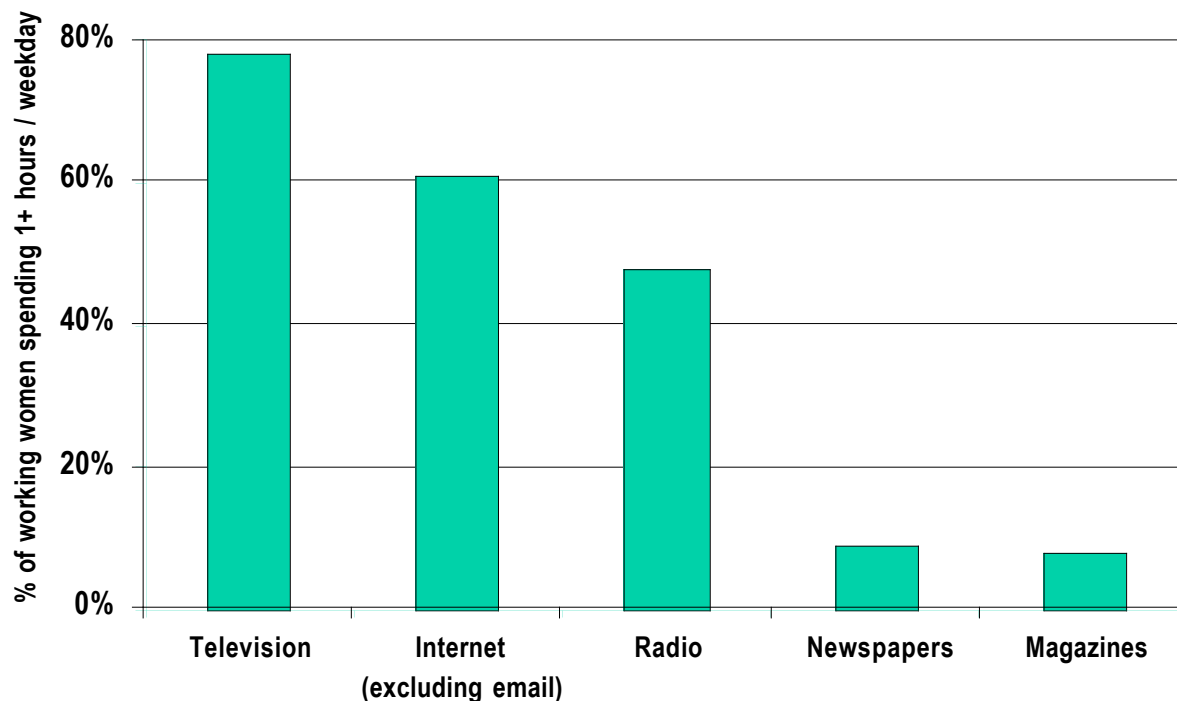
Women Are Pressed For Time

- Women who access the Web at work are extremely busy, with 60% saying they don't have enough time for their personal needs compared to 48% of men (top 2 box net).
 - *Online working women with children and those with HHI > \$75,000 per year are even more likely to say they don't have enough time – 69% and 70%, respectively.*



Media Consumes Significant Time During the Week

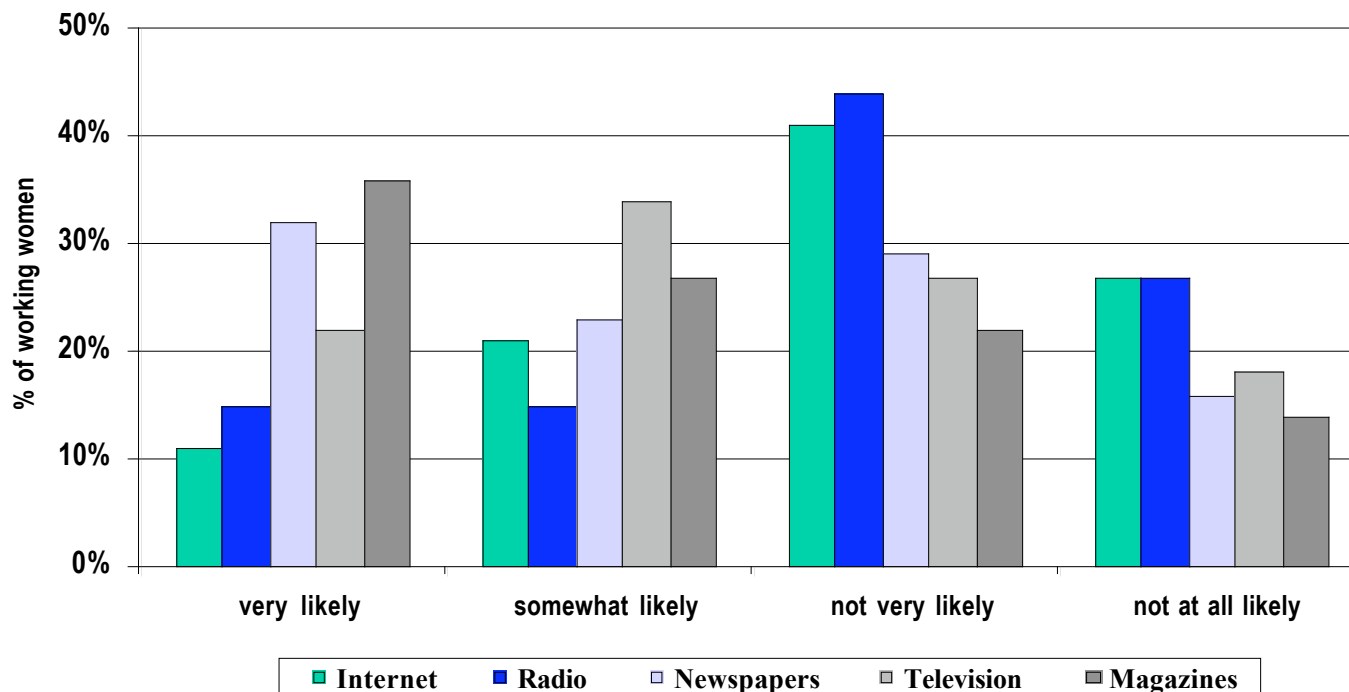
- Nearly 80% of online working women spend over an hour watching Television on an average weekday, and over 60% spend over an hour on the Internet.
 - *Online working women with job titles of VP or higher and those who approve business purchase decisions spend more time on the Internet than average – 78% and 77% respectively spend over an hour online on an average weekday.*



Base: Women who use the Internet at work.

Internet and Radio Are Rarely Eliminated To Save Time

- 70% of online working women say they are **unlikely** to remove Radio or the Internet from their daily routine in order to save time, while over half say they **would** remove Newspapers, Television, or Magazines.



Base: Women who use the Internet at work.

Internet Useful For a Variety of Tasks

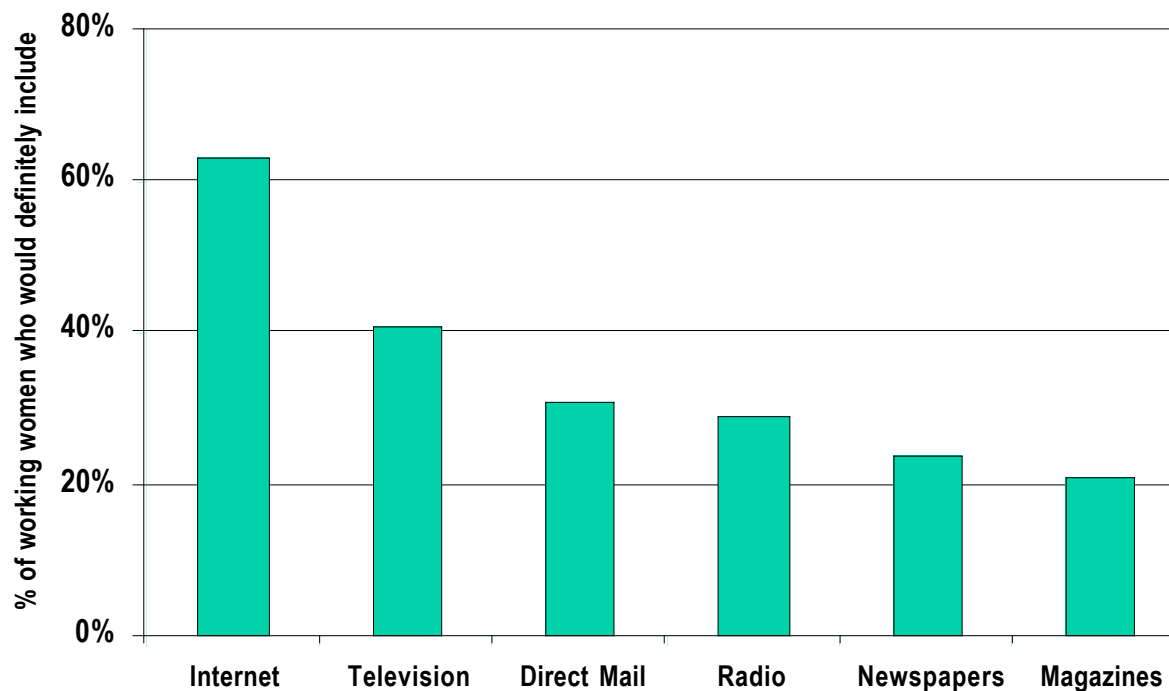
- Online working women say nearly every major category of transaction and research is made simpler online, with the only real drawback being the amount of time spent online.
 - 87% of online working women agree that product research is made easier online.

	Strongly agree	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree strongly
<i>I conduct more product research online than I would be able to offline</i>	54%	33%	8%	3%	2%
<i>Sometimes I spend more time online than I planned to</i>	43%	42%	8%	5%	2%
<i>I connect and keep in touch with people online I would not be able to connect with offline</i>	44%	34%	9%	8%	4%
<i>I am better informed in making health/medical decisions because I research these issues online</i>	31%	37%	20%	8%	5%
<i>I often purchase things online that I would not have the time to purchase offline.</i>	30%	35%	16%	12%	8%
<i>I keep current on news events online more than I would be able to offline</i>	30%	33%	19%	11%	7%
<i>I track financial/investment activities online more easily than I could offline</i>	29%	22%	26%	11%	12%
<i>I feel more at risk conducting transactions online than offline</i>	12%	29%	23%	25%	12%
<i>I plan my personal and social activities online during the weekday when I otherwise would not</i>	6%	16%	28%	24%	26%

Base: Women who use the Internet at work.

Internet Recommended To Reach Women

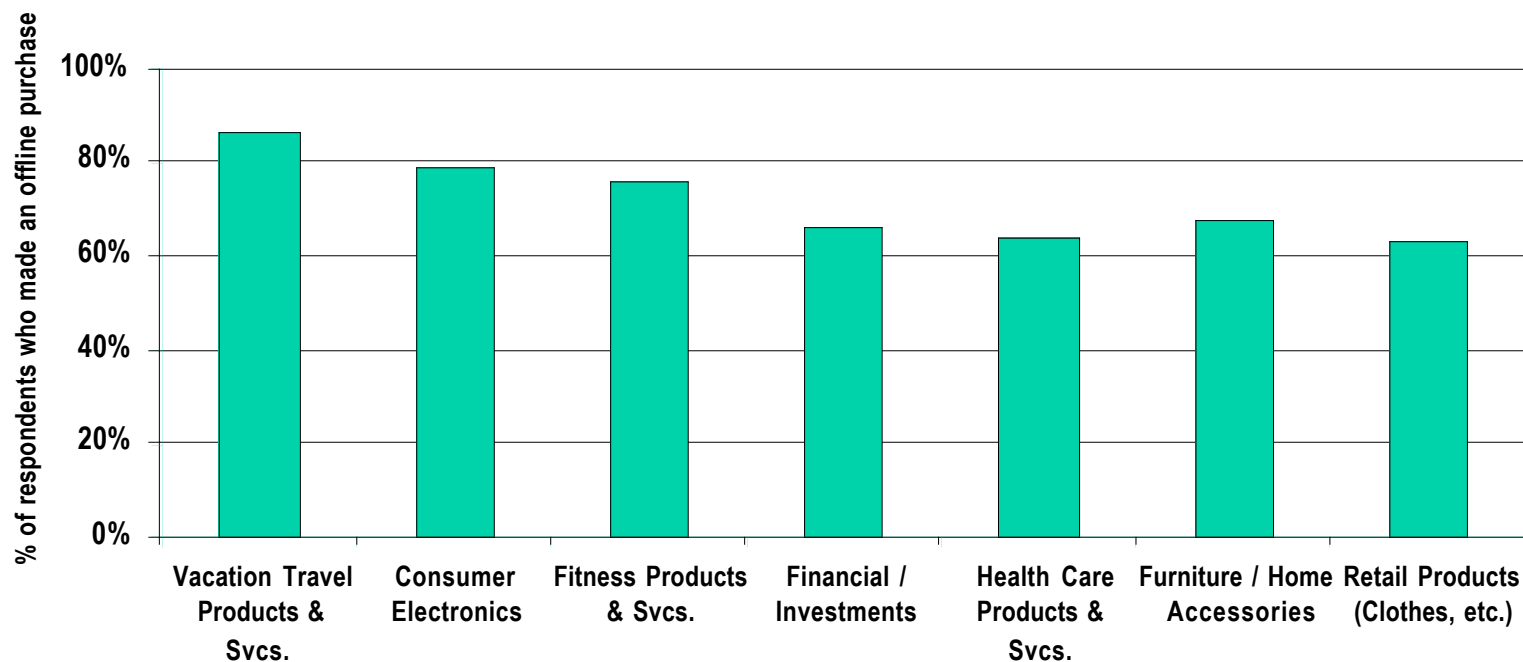
- Over 60% of online working women recommended using the Internet in an advertising campaign aimed at reaching them.
 - Only 41% of online working women recommended using Television, and 31% recommended Direct Mail.



Base: Women who use the Internet at work.

Online Research For Offline Purchases

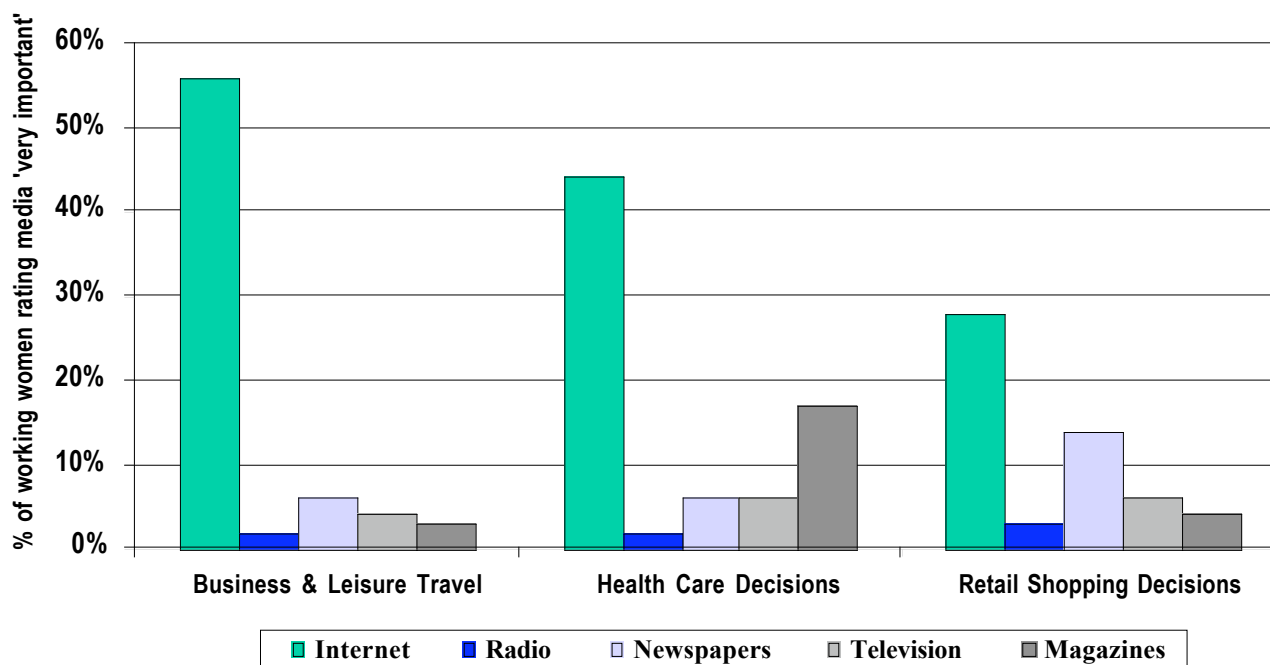
- Online working women use the Web extensively to research purchases that they conduct offline.
 - *Over 80% of those who purchased travel products or services offline in the past month researched their purchases online beforehand.*
 - *The majority of purchases across most major categories are still conducted offline, although Vacation Travel Products and Services are more often purchased online.*



Base: Women who use the Internet at work.

Web Is Key Medium For Travel And Health Care Research

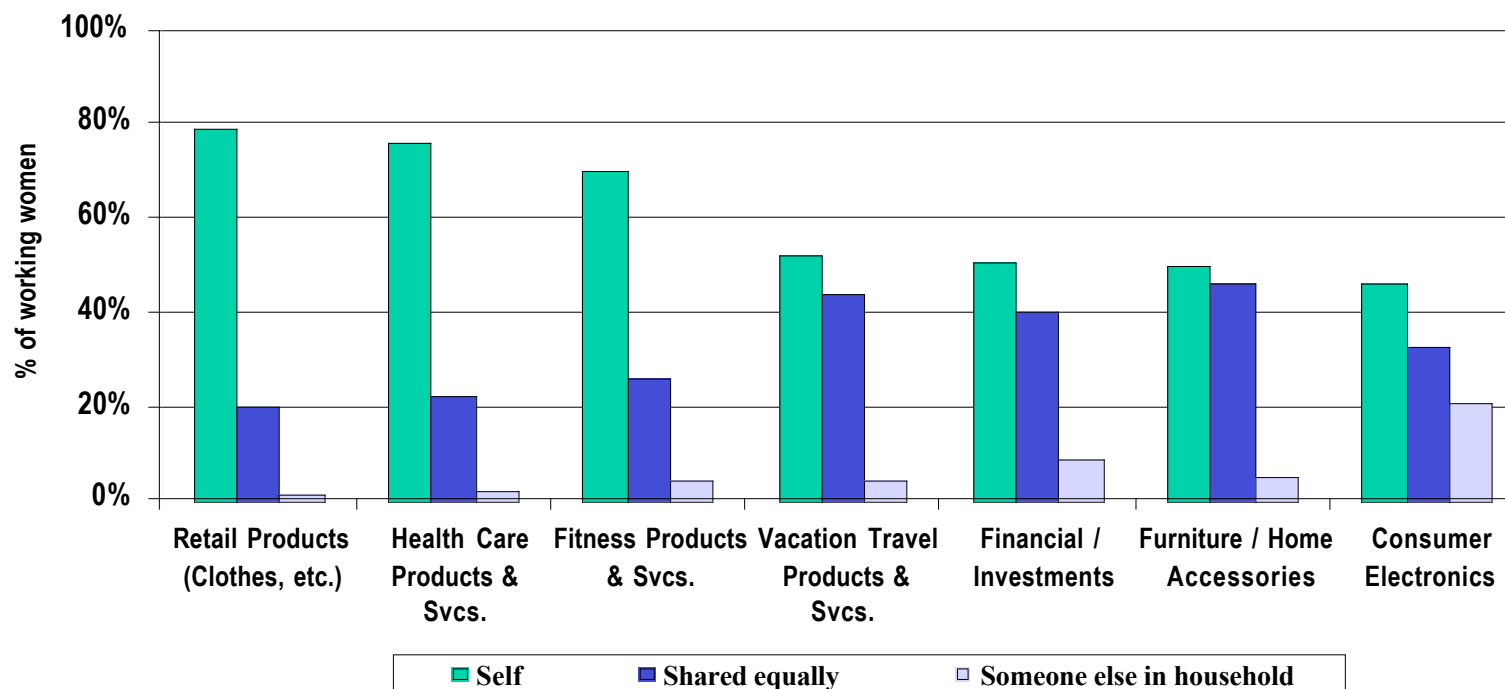
- Over half (56%) of online working women believe that the Web is a 'very important' source when considering travel purchases. 44% believe the Web is 'very important' when looking for health and fitness information.
 - *Less than 10% of online working women believe that any other media is 'very important' when considering travel purchases.*



Base: Women who use the Internet at work.

Household Decision Making Balance of Power

- Online working women control the majority of household purchase decisions for Retail Products, Health Care, and Fitness Products and Services. In most other categories, the decision making power is shared equally within the household.



Base: Women who use the Internet at work.

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Appendix

*Sample Characteristics &
Detailed Findings Adults*

Nielsen//NetRatings

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Access Location

- From which of the following locations do you regularly access the Internet?
Please choose all that apply.

Location	% Composition
Home	75%
Work inside the home	20 %
Work outside the home	89 %
School	5 %
Other	2 %

Online Frequency By Location

- How often do you access the Internet (excluding email) at each of the following locations?

Location	Multiple times per day	About once per day	2-6 times per week	About once per week	1-3 times per month 2-3 hours	Less than once per month
Home	30 %	25 %	14 %	4 %	1 %	--
Work inside the home	13 %	4 %	1 %	1 %	--	--
Work outside the home	59 %	15 %	9 %	3 %	1 %	1 %
School	1 %	1 %	2 %	1 %	1 %	--
Other location	--	--	1 %	--	1 %	--

Weekday Media Usage

- Thinking about an AVERAGE WEEKDAY, how much time do you spend with each of the following media?

Media	Less than 15 minutes	16-30 minutes	31-60 minutes	1-2 hours	2-3 hours	3-5 hours	More than 5 hours	None
Newspapers	44%	23 %	11 %	5 %	2 %	1 %	--	14 %
Magazines	45 %	25 %	12 %	6 %	1 %	1 %	--	11 %
Internet (excluding email)	5 %	15 %	19 %	23 %	14 %	11 %	13 %	--
Radio	13 %	15 %	20 %	17 %	8 %	8 %	16 %	4 %
Television	4 %	4 %	10 %	22 %	25 %	19 %	12 %	3 %

Media Usage Trends (past 12 months)

- In the past 12 months, has your use of each of the following media increased, decreased, or stayed the same?

Media	Increased	Decreased	Stayed the Same
Internet (excluding email)	48%	5%	47%
Newspapers	9%	25%	66%
Magazines	14%	24%	62%
Radio	16%	13%	70%
Television	12%	22%	66%

Time For Personal Needs

- Thinking about an AVERAGE WEEKDAY, how do you feel about the amount of time you have for your personal needs?

	% Composition
5. I have plenty of time	6%
4.	9%
3.	25%
2.	32%
1. I do not have enough time	29%

Media Usage Tradeoffs

- How likely are you to reduce or remove the following media from your daily routine when looking to save time?

Media	Very likely	Somewhat likely	Not very likely	Not at all likely
Internet (excluding email)	11%	21%	41%	27%
Newspapers	32%	23%	28%	16%
Magazines	36%	27%	22%	14%
Radio	14%	15%	44%	27%
Television	23%	37%	27%	18%

Opinions About The Internet

- Please indicate your agreement with each of the following statements.

	I strongly agree	I agree	Neither agree nor disagree	I disagree	I strongly disagree
I often purchase things online that I would not have the time to purchase offline	30%	35%	15%	12%	7%
I conduct more product research online than I would be able to offline	54%	32%	8%	3%	2%
I connect and keep in touch with people online I would not be able to connect with offline	44%	34%	9%	8%	4%
I keep current on news events online more than I would be able to offline	30%	33%	19%	11%	7%
I plan my personal and social activities online during the weekday when I otherwise would not	6%	16%	27%	25%	26%

Opinions About the Internet

- Please indicate your agreement with each of the following statements.

	I strongly agree	I agree	Neither agree nor disagree	I disagree	I strongly disagree
I am better informed in making health/medical decisions because I research these issues online	31%	37%	20%	8%	5%
I track financial/investment activities online more easily than I could offline	29%	22%	26%	11%	12%
I feel more at risk conducting transactions online than offline	11%	29%	23%	25%	12%
Sometimes I spend more time online than I planned to	42%	42%	9%	5%	2%

Important Sources For Retail Shopping

- Which of the following are important sources for you when considering retail shopping decisions? Please choose all that apply.

Media	Very Important	Somewhat Important	Not Very Important	Not at all Important
Internet (excluding email)	28%	45%	21%	6%
Newspapers	14%	38%	30%	17%
Magazines	4%	27%	47%	22%
Radio	3%	25%	50%	23%
Television	6%	45%	36%	13%

Important Sources For Travel Purchases

- Which of the following are important sources for you when considering business or vacation travel purchases? Please choose all that apply.

Media	Very Important	Somewhat Important	Not Very Important	Not at all Important
Internet (excluding email)	56%	32%	6%	5%
Newspapers	6%	27%	42%	25%
Magazines	3%	24%	44%	29%
Radio	2%	16%	49%	33%
Television	4%	27%	44%	25%

Important Sources For Health/Fitness Information

- Which of the following are important sources for you when looking for health and fitness information? Please choose all that apply.

Media	Very Important	Somewhat Important	Not Very Important	Not at all Important
Internet (excluding email)	44%	37%	12%	6%
Newspapers	6%	30%	41%	23%
Magazines	17%	45%	23%	15%
Radio	2%	18%	49%	31%
Television	6%	36%	37%	21%

Household Decision Making

- Who is the primary decision maker within your household for each of the following types of products and services?

Product	Self	Someone else in household	Shared equally
Retail Products (Clothes/Shoes/Accessories)	79%	1%	20%
Health care product and services	76%	2%	22%
Fitness related products and services	70%	4%	26%
Dining Groceries	69%	4%	28%
Vacation travel products and services	52%	4%	44%
Financial/Investments	51%	9%	40%
Furniture/Home Accessories	50%	5%	46%
Consumer Electronics	46%	21%	33%
Automobiles (new or used)	41%	13%	45%

Online And Offline Purchasing

- Which of the following types of products have you purchased (online or offline) in the past 30 days?

Product	Purchased online	Purchased offline	Both	Neither
Vacation travel products and services	22%	6%	10%	62%
Retail Products (Clothes/Shoes/Accessories)	14%	40%	28%	17%
Health care product and services	9%	51%	13%	27%
Financial/Investments	9%	13%	4%	74%
Consumer Electronics	8%	29%	13%	50%
Fitness related products and services	7%	23%	6%	64%
Furniture/Home Accessories	5%	26%	11%	58%
Dining Groceries	3%	73%	6%	19%
Automobiles (new or used)	1%	15%	2%	82%

Online Spending

- For each of the products you have purchased online in the past 30 days, please indicate approximately how much you have spent. [Among respondents who purchased online]

Product	Less than \$50	\$50-\$99	\$100-\$249	\$250-\$499	\$500+
Health care product and services	40%	37%	16%	5%	2%
Fitness related products and services	51%	26%	16%	5%	2%
Retail Products (Clothes/Shoes/Accessories)	17%	29%	37%	12%	5%
Consumer Electronics	19%	21%	22%	19%	18%
Furniture/Home Accessories	24%	24%	28%	12%	11%
Vacation travel products and services	13%	9%	15%	25%	38%
Financial/Investments	24%	13%	13%	10%	40%
Dining Groceries	26%	24%	22%	18%	10%
Automobiles (new or used)	37%	4%	4%	7%	48%

Online Research For Offline Purchases

- For each type of product you said you purchased offline in the past 30 days, please indicate how you generally conducted your research. [Among respondents who purchased offline]

Product	All online	Majority online/some offline	Online/offline equally	Majority offline/some online	All Offline
Consumer Electronics	9%	28%	27%	16%	21%
Health care product and services	5%	19%	21%	19%	36%
Fitness related products and services	6%	23%	29%	19%	24%
Retail Products (Clothes/Shoes/Accessories)	3%	12%	21%	26%	37%
Automobiles (new or used)	10%	20%	21%	18%	32%
Furniture/Home Accessories	4%	13%	24%	27%	32%
Financial/Investments	7%	18%	21%	21%	34%
Dining Groceries	1%	4%	7%	22%	66%
Vacation travel products and services	15%	31%	24%	17%	13%

Additional Online Transactions

- Which of the following activities have you participated in ONLINE in the past 30 days? Please choose all that apply.

Activity	% Composition
Bill payment services	60%
Digital picture sharing	35%
Auction shopping/purchasing	30%
DVD/movie rentals	10%
MP3/music purchases	7%
Online dating services	7%
None of the above	23%

Additional Online Research Activities

- Which of the following activities have you done in the past 12 months? Please choose all that apply.

Activity	% Composition
Researched drugs or drug interactions (Rx or OTC)	57%
Researched health care providers	39%
Researched the health and welfare of friends or family members	33%
Researched fitness or nutrition related information	54%
Researched alternative treatment methods (clinical trials, nonmedical treatments, etc.)	25%
None of the above	17%

Sites Used For Health Care Research

- Which types of Web sites do you use for information to help you make health care decisions? Please choose all that apply.

Website Category	% Composition
Health/Medical Web sites	74%
Women's Web sites	41%
Portals / Search engines	38%
News Web sites	31%
Other	3%
I do not use the Internet to help make health care decisions	14%

Reaching Women With Advertising

- If you were planning an advertising campaign to reach someone like you, which of the following media would you include?

	Internet	Newspapers	Magazines	Radio	Television	Direct Mail
Definitely Would Include	63%	24%	21%	29%	41%	30%
Probably Would Include	21%	31%	30%	29%	31%	24%
Might or Might not Include	11%	22%	28%	23%	16%	21%
Probably not Include	4%	14%	13%	12%	7%	13%
Definitely not Include	2%	9%	8%	7%	4%	11%

washingtonpost.com and Newsweek.com Audience Samples

- An identical version of the survey was administered to 573 washingtonpost.com users and 625 Newsweek.com users immediately following the Web panel administration. While response to most questions regarding media usage and purchasing habits were very similar, there were some differences between the three samples. The most notable differences are summarized below:
 - washingtonpost.com and Newsweek.com at-work users are less likely to access the Internet regularly from home than at-work Web users overall. The majority of traffic to both sites occurs during the day from at-work users.
 - washingtonpost.com and Newsweek.com at-work users access the Internet more often on average than most at-work Web users – over 70% of users to both sites access the Web multiple times per day compared to only 59% of at-work Web users overall.
 - washingtonpost.com at-work users are more likely to access the Web to plan personal and social activities than the average at-work user, while Newsweek.com users are more likely to use the Web for health/medical research or financial/investment tracking.
 - washingtonpost.com and Newsweek.com at-work users are more likely to be salaried professionals and less likely to be hourly employees than the average at-work user.
 - washingtonpost.com and Newsweek.com at-work users are older, more affluent and more highly educated than the average at-work Web user.
- For additional data from washingtonpost.com and Newsweek.com samples please contact mary.bannon@wpni.com.