



OPA europe
online publishers association

Internet Access At Work

A Media Consumption study

Results for Europe

2006/2007 (Wave 2)

Conducted by SKOPOS market insight

(Wave 1 completed in 2004)

Two types of Internet users were queried for this study

At Work Internet Users

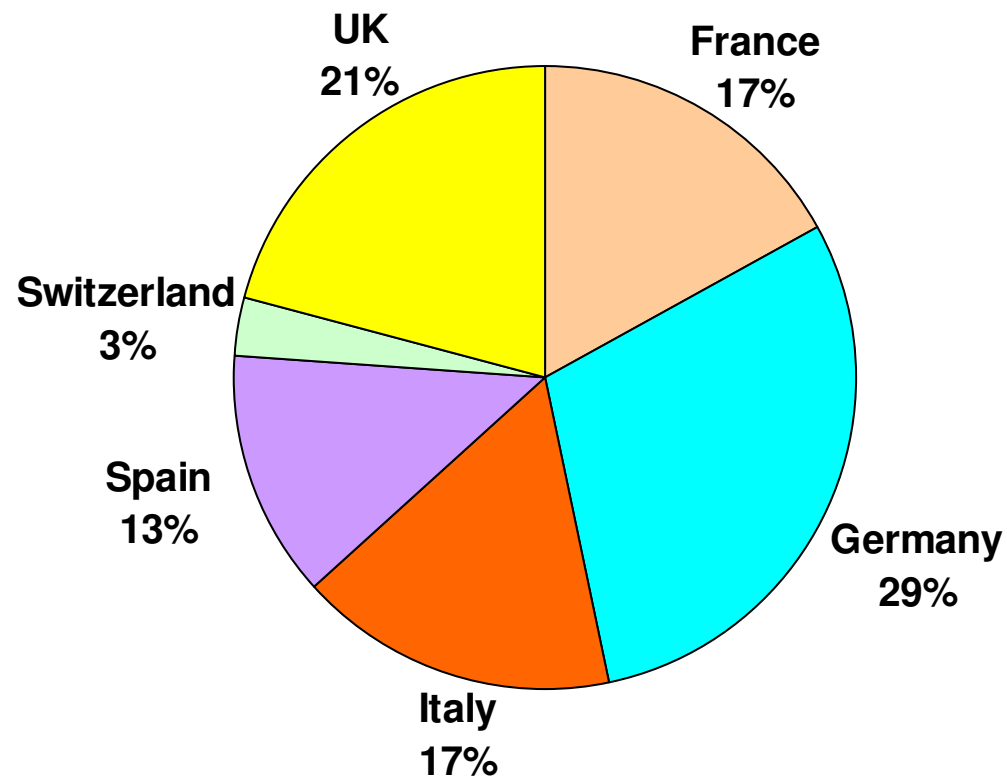
Accessed Internet from work within past 30 days for non-email purposes



Non-work Internet Users

Accessed Internet from home, school or elsewhere – but not work – within past 30 days

At work users from 6 countries were polled for this research



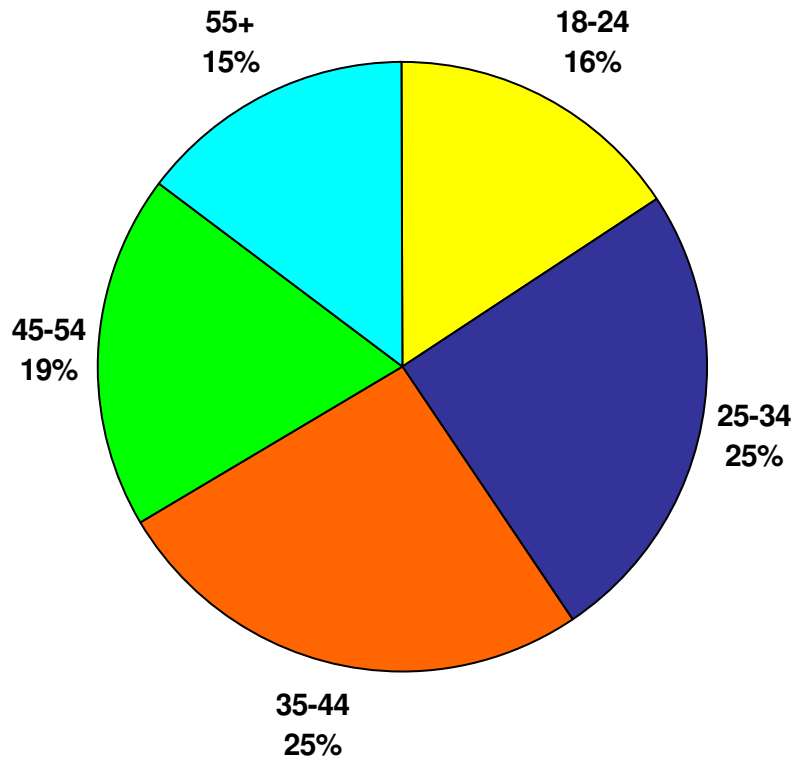
Base: All respondents (weighted): 2006 (136154)

Demographics Europe



At Work Users in Europe are mostly male, over 35 and very highly educated

Demographics



	At Work %	Non Work %
Male	58	53
Female	42	47
18-34	39	43
35+	62	56
Univ.+	75	64

(At least 4 years at University)

Base: All respondents (weighted): 136154

Base: At work (weighted): 2006 (96318)

Base: Non work (weighted): 2006 (39837)

At Work users in Europe are the main decision makers both at home and At Work

Spending behaviour



	At Work %	Non Work %
Household Grocery Shopping	72	60
Major household purchases	89	74
Income 50K€ +	41	29
Authorise company spending	44	23

Q29. Do you do at least half the grocery shopping for your household?

Q30. And do you have at least half of the say in major household purchases (e.g. cars, computers)?

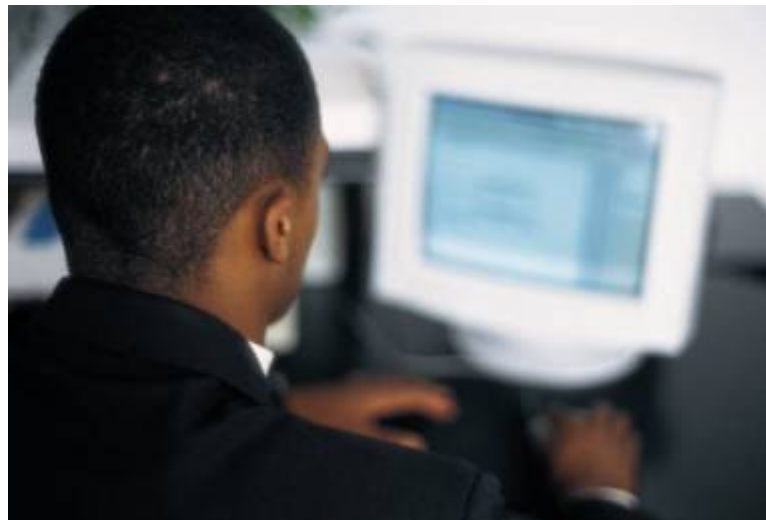
Q44. Which classification best describes your total pre-tax household income in euros?

Q35. How much spending (in EUR) do you typically authorise for your company each year?

Base: At work (weighted): 2006 (96318)

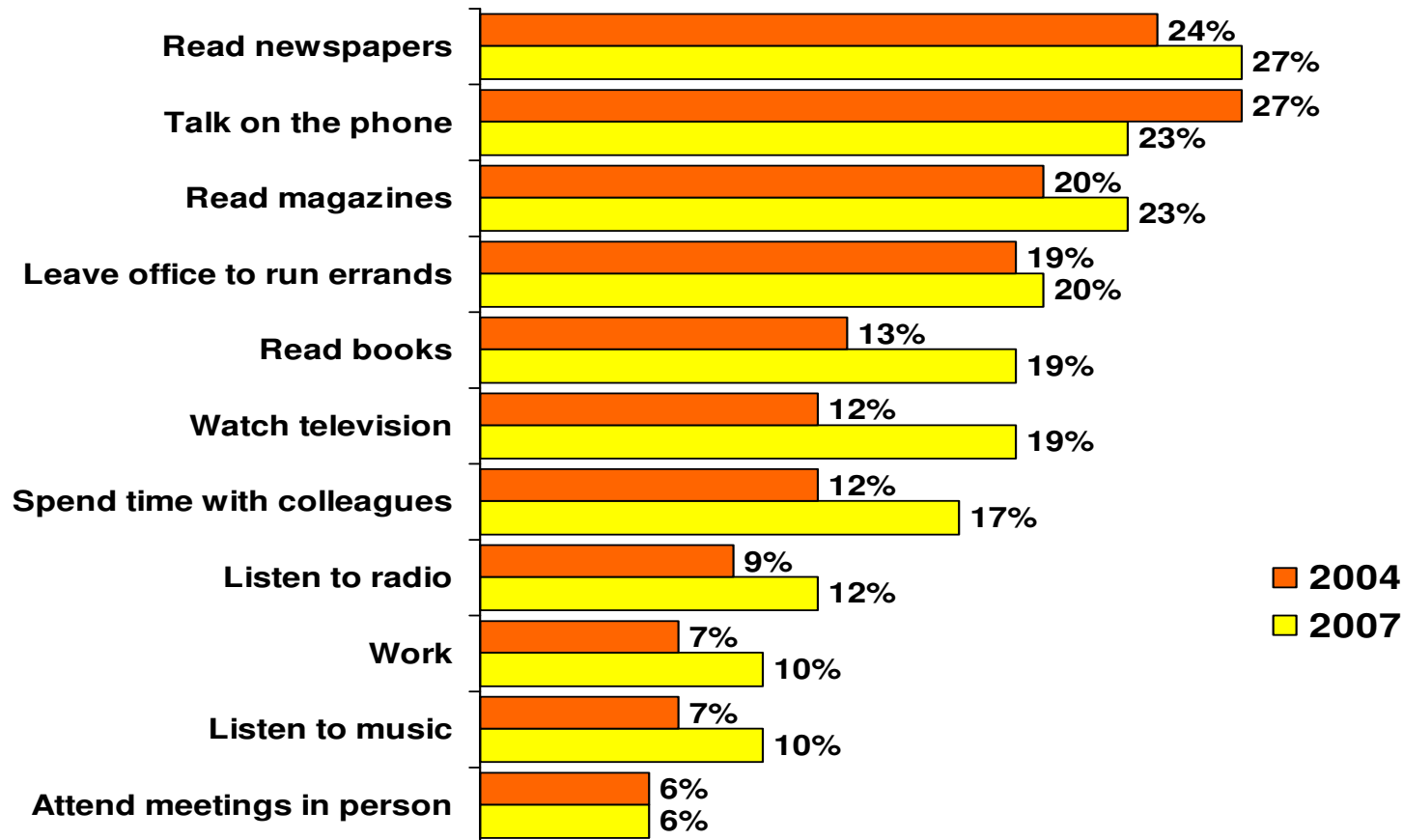
Base: Non work (weighted): 2006 (39837)

Internet Behaviour and Attitudes



At Work Internet use in Europe has remained stable since 2004

Things At Work users do LESS often as a result of using the internet



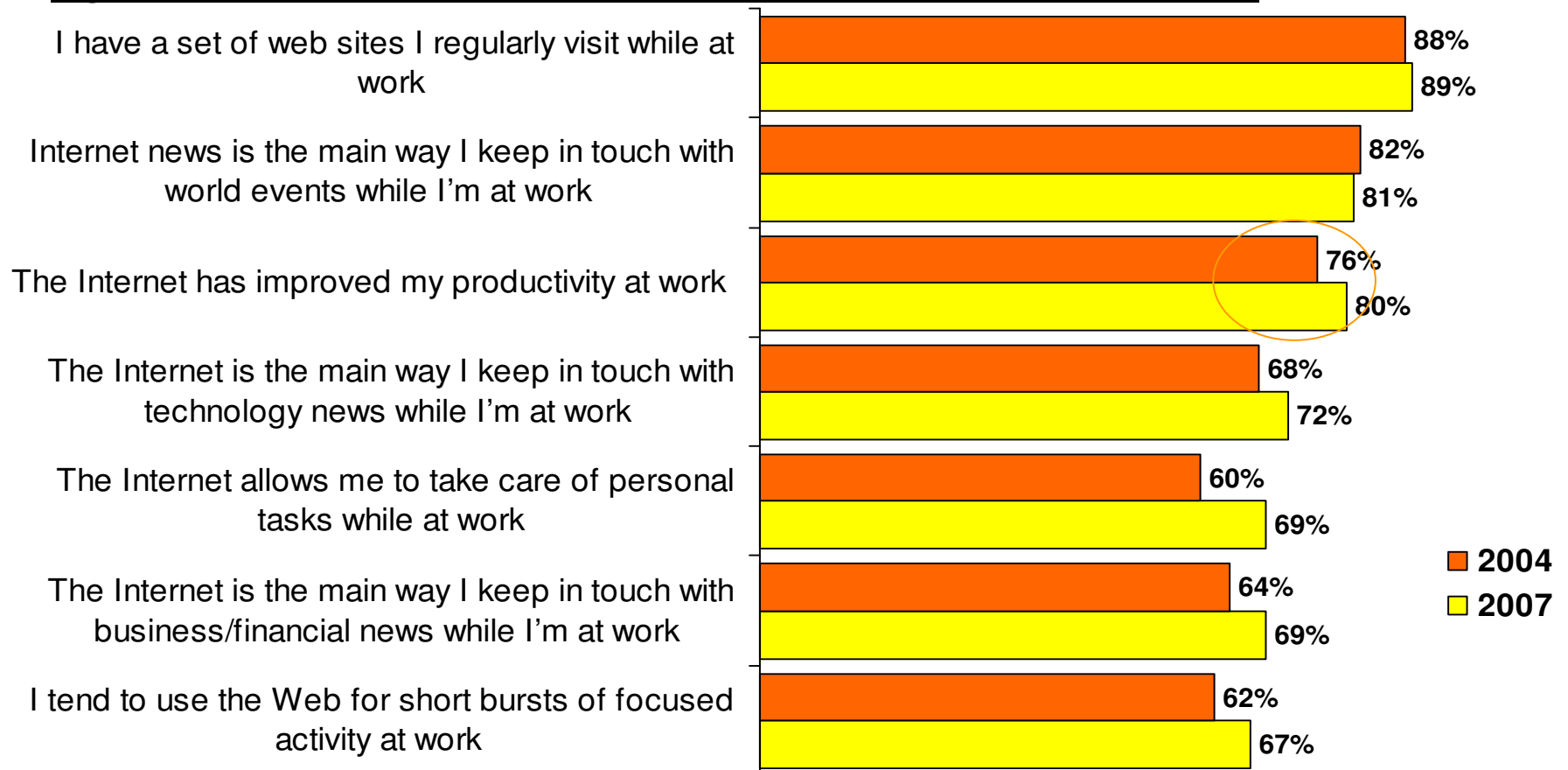
Q25. Which of the following do you do less often at work as a result of using the Internet?

Base: At work users (weighted):2006 (96318)

In 2007, more European users feel the Internet improves their productivity At Work

Chart 1 of 2

Agreement with statements related to use of Internet at work



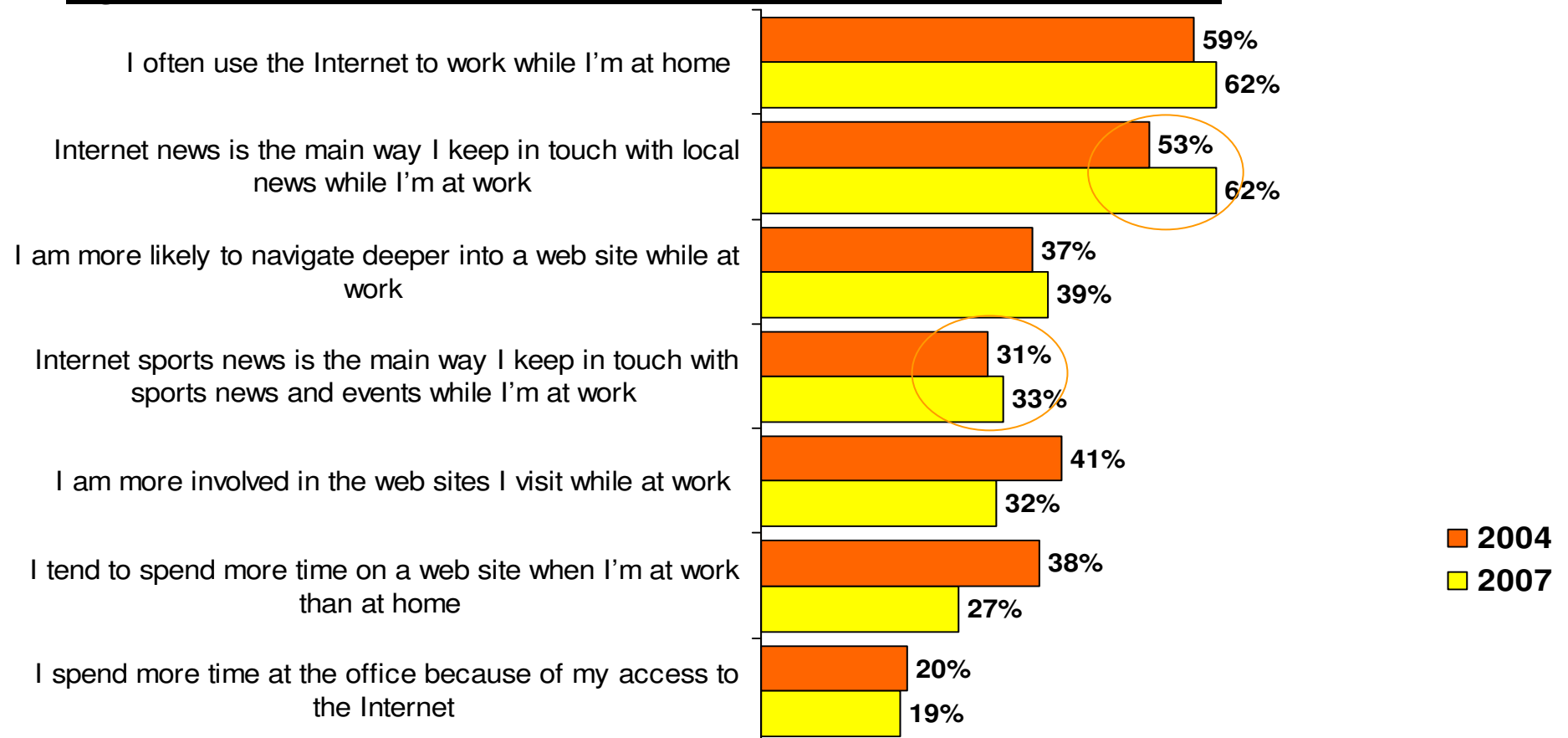
Q23. Please indicate your agreement with the following statements related to your use of the Internet at work (agree net % shown)

Base: At work users (weighted): 2006 (96318)

European users spend more time on News and Information sites in 2007

Chart 2 of 2

Agreement with statements related to use of internet at work



Q23. Please indicate your agreement with the following statements related to your use of the Internet at work (agree net % shown)

Base: At work users (weighted): 2006 (96318)

Visiting news and information sites is the number one reason European At Work users access the Internet

Chart 1 of 3

Reasons for accessing the Internet

At Work Users (%)		
	From work	From home/school/ elsewhere
News/current events	78	69
Education/Learning	61	49
Local or regional information	60	62
Research companies or vendors	56	33
Check weather	51	54
Research products or services for purchases	50	56
Travel planning/reservations	47	71
Other	44	49
Customer service/technical support	44	43
Get information on special interest/hobbies	42	35

Q17. For which of the following reasons do you access the Internet?

Base: At work (weighted): 2007 (96318)

Visiting news and information sites is the number one reason European At Work users access the Internet

Chart 2 of 3

Reasons for accessing the Internet

At Work Users (%)		
	From work	From home/school/elsewhere
Investment/transactions/online banking	39	56
Buy products or services	38	65
Entertainment planning (dining, movies, etc.)	33	68
Buy tickets	28	53
Get information on sports/check sports scores	25	35
Find/research employment opportunities	24	38
Read blogs or make blog entries	23	38
Health and health-related information	20	44
Listen to music	19	46
Find used goods for purchase (online auctions, classifieds, etc.)	19	40

Q17. For which of the following reasons do you access the Internet?

Base: At work (weighted): 2007 (96318)

Visiting news and information sites is the number one reason European At Work users access the Internet

Chart 3 of 3

Reasons for accessing the Internet

At Work Users (%)		
	From work	From home/school/elsewhere
Download music/ multimedia files/software utilities	16	55
Watch online video	16	41
Get information on food and cooking	15	40
Check RSS-feed via RSS-reader	14	16
Make phone calls (e.g. Skype)	12	34
Get information on automobiles	10	24
Home improvement/decorating	10	29
Online games	8	28
Download Podcasting-files	7	18
Participate in personals/dating services	5	14
Get information on parenting/babies	5	13

Q17. For which of the following reasons do you access the Internet?

Base: At work (weighted): 2007 (96318)

European users still spend the majority of their time on News and Information sites

Chart 1 of 3

Sites visited in a typical week 7-day week

At Work Users (%)			Non Work Users (%)		
	2007	2004		2007	2004
News	82	80	News	81	76
Search engines	77	-	Search engines	71	-
Weather	57	46	Weather	50	41
Entertainment planning	52	37	Entertainment planning	48	42
Hobbies	48	36	Hobbies	54	44
Computer / SW	47	44	Computer / SW	46	43
Travel	46	40	Travel	41	36
Educational	41	31	Educational	43	37
Blogs	34	-	Blogs	39	-
Music	31	21	Music	45	32
Ticketing services	35	24	Ticketing services	34	20
Radio	31	19	Radio	38	23

Q18. Which types of web sites do you typically visit in an average 7-day week?

Base: At work (weighted): 2006 (96318)

Base: Non work (weighted): 2006 (39837)

European users still spend the majority of their time on News and Information sites

Chart 2 of 3

Sites visited in a typical week 7-day week

At Work Users (%)			Non Work Users (%)		
	2007	2004		2007	2004
Business News Websites	37	-	Business News Websites	20	-
Sports	29	24	Sports	33	26
Retail shopping	30	21	Retail shopping	25	25
Financial services	32	39	Financial services	19	36
Popular Culture	26	30	Popular Culture	27	34
Job listings	26	21	Job listings	28	28
Food/cooking	25	13	Food/cooking	29	21
Online auctions	25	22	Online auctions	26	26
Games	21	13	Games	29	26
Message boards	24	25	Message boards	21	30
Electronics	24	15	Electronics	21	19
Health/Fitness	21	16	Health/Fitness	25	16
Real Estate	16	10	Real Estate	13	10

Q18. Which types of web sites do you typically visit in an average 7-day week?

Base: At work (weighted): 2006 (96318)

Base: Non work (weighted): 2006 (39837)

European users still spend the majority of their time on News and Information sites

Chart 3 of 3

Sites visited in a typical week 7-day week

At Work Users (%)			Non Work Users (%)		
	2007	2004		2007	2004
Classifieds	13	9	Classifieds	13	12
Home Improvement	13	-	Home Improvement	10	-
Automobile	10	10	Automobile	14	15
Dating Services	9	9	Dating Services	7	18
Parenting/Babies	7	-	Parenting/Babies	5	-

Q18. Which types of web sites do you typically visit in an average 7-day week?

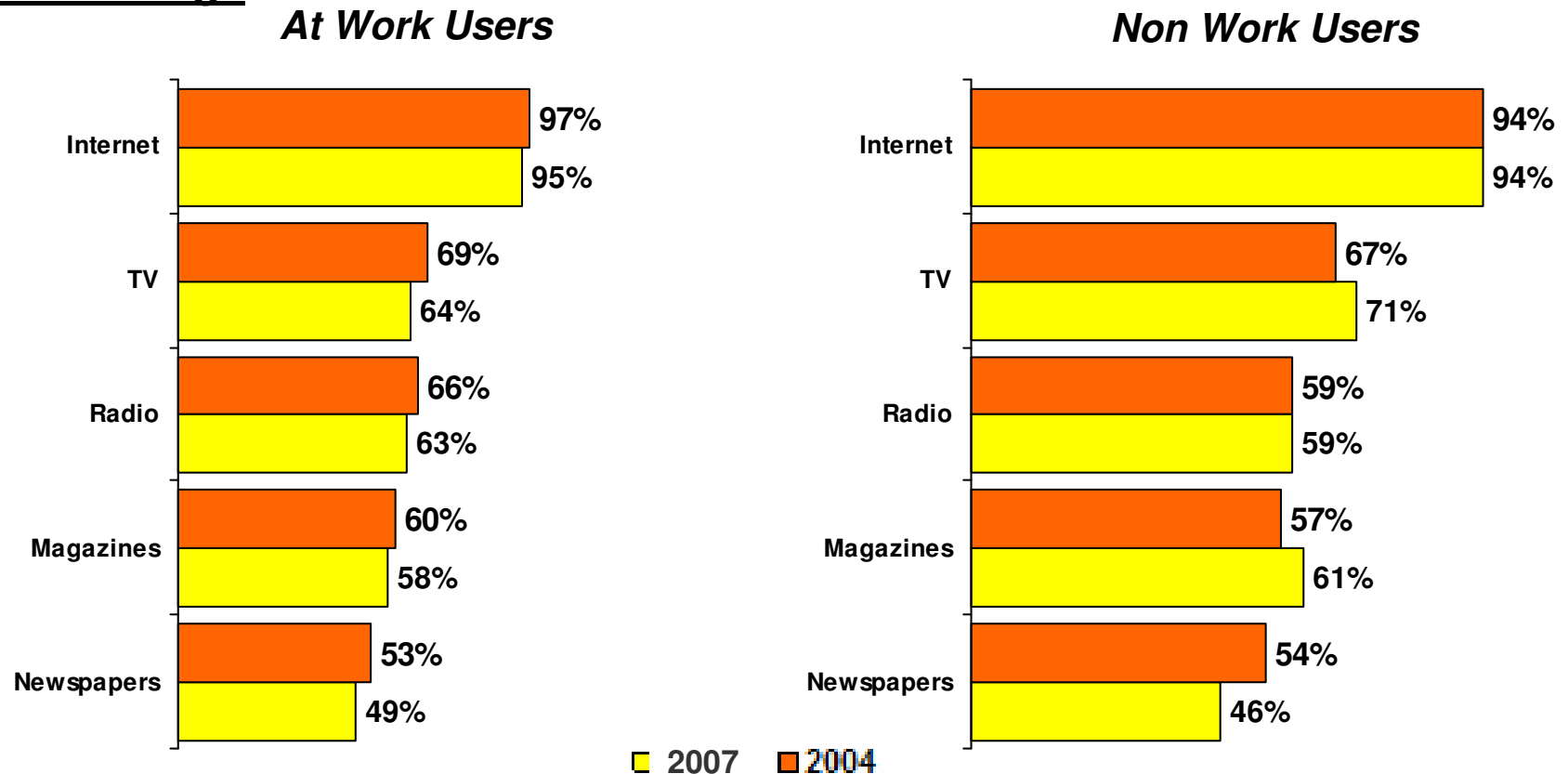
Base: At work (weighted): 2006 (96318)
Base: Non work (weighted): 2006 (39837)

Media Consumption differences



Internet use has remained stable – and very high - amongst European At Work users

Media usage



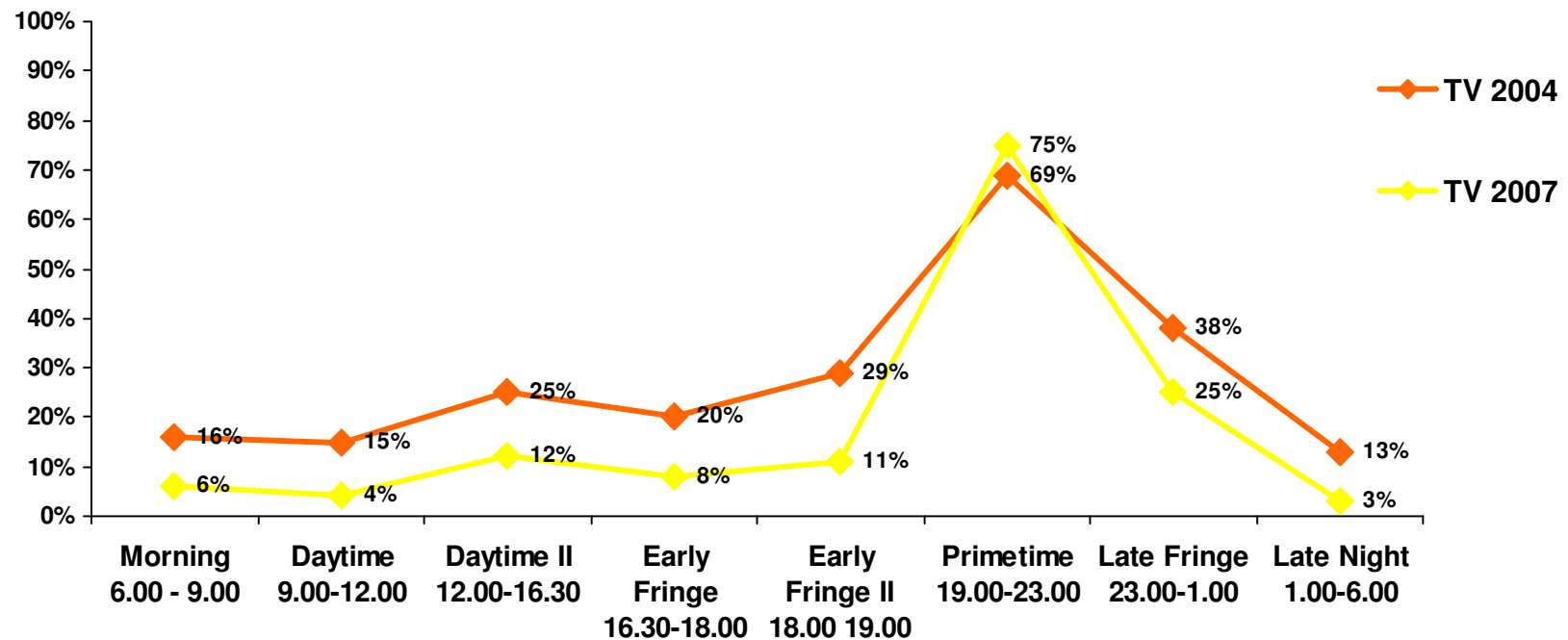
Q4/6/8/10/12 Did you read any magazines yesterday? Read newspapers? Watch TV? Listen to radio? Use internet?

Base: At work (weighted): 2006 (96318)
Base: Non work (weighted): 2006 (39837)

TV consumption has dropped in Europe since 2004, except during primetime

Chart 3 of 5

Total Media Audience by Day Part - At Work Users - TV



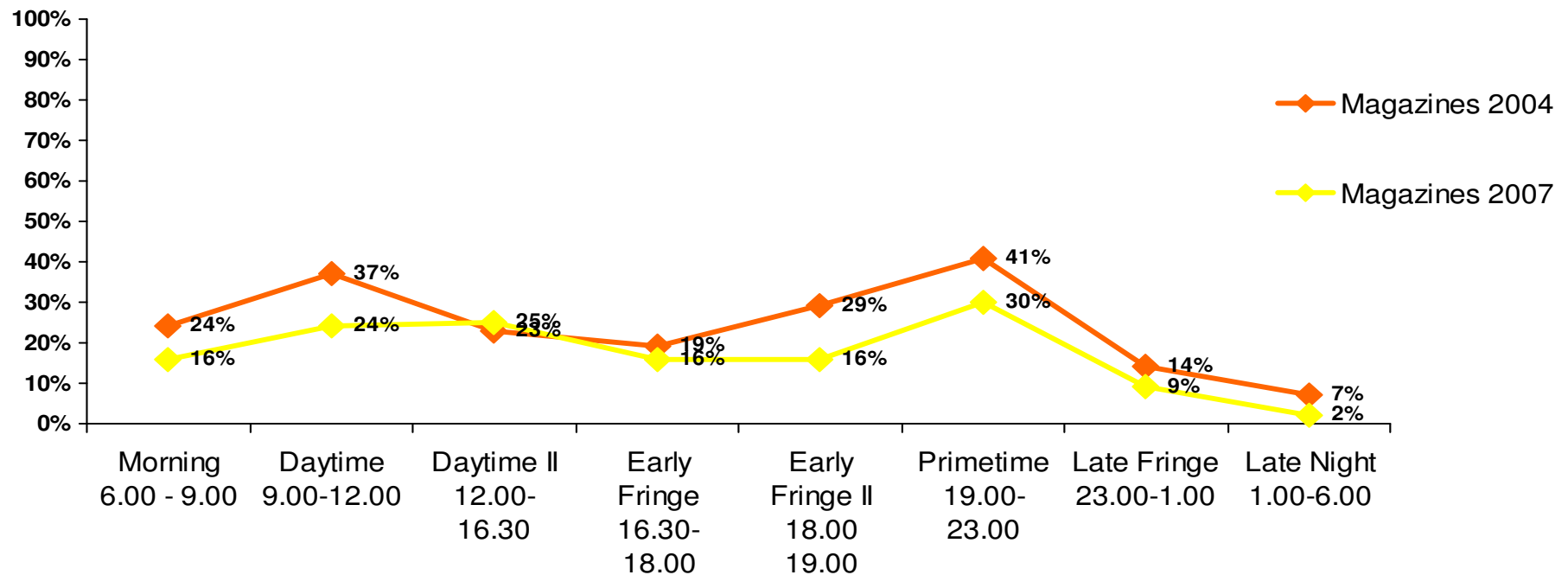
Q5. Between which hours did you watch TV yesterday...?

Base: At work (weighted): 2006 (61167)

Magazine reading has mainly dropped throughout the day in Europe

Chart 2 of 5

Total Media Audience by Day Part - At Work Users - MAGAZINES



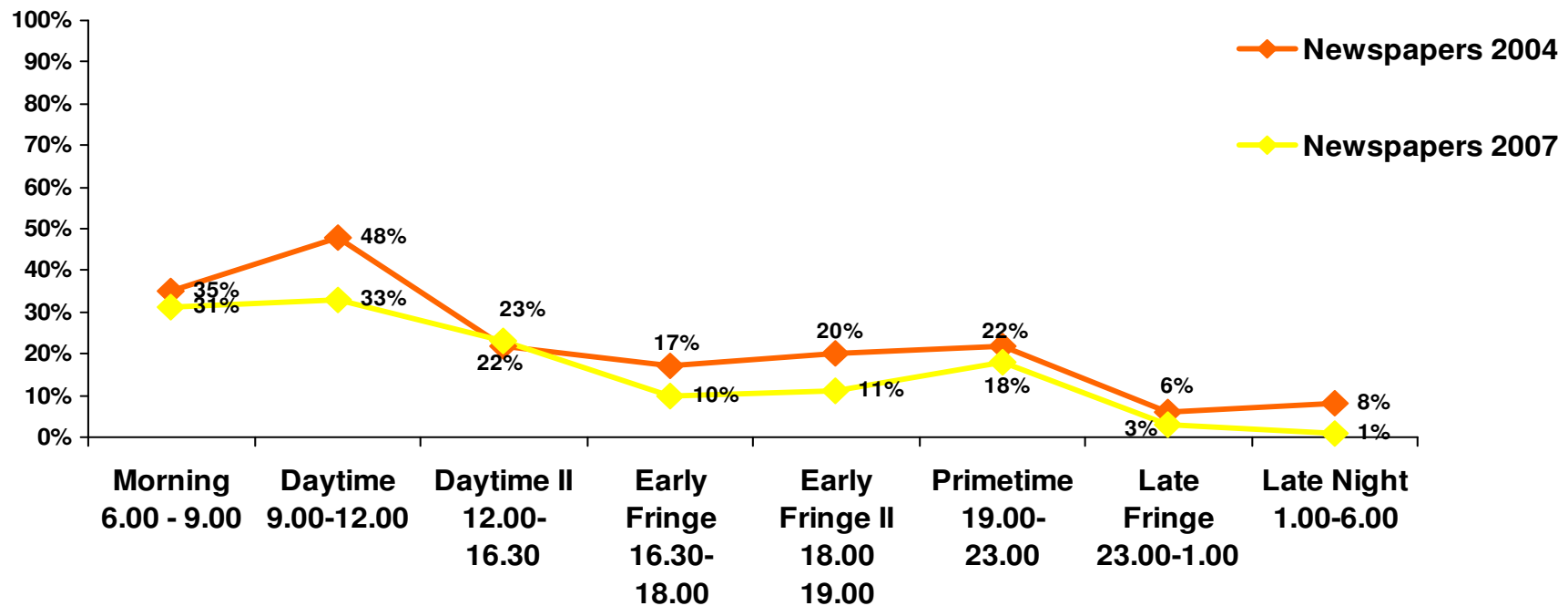
Q7. Between which hours did you read magazines yesterday...?

Base: At work (weighted): 2006 (56275)

Newspaper reading has mainly dropped throughout the day in Europe

Chart 4 of 5

Total Media Audience by Day Part - At Work Users - NEWSPAPERS



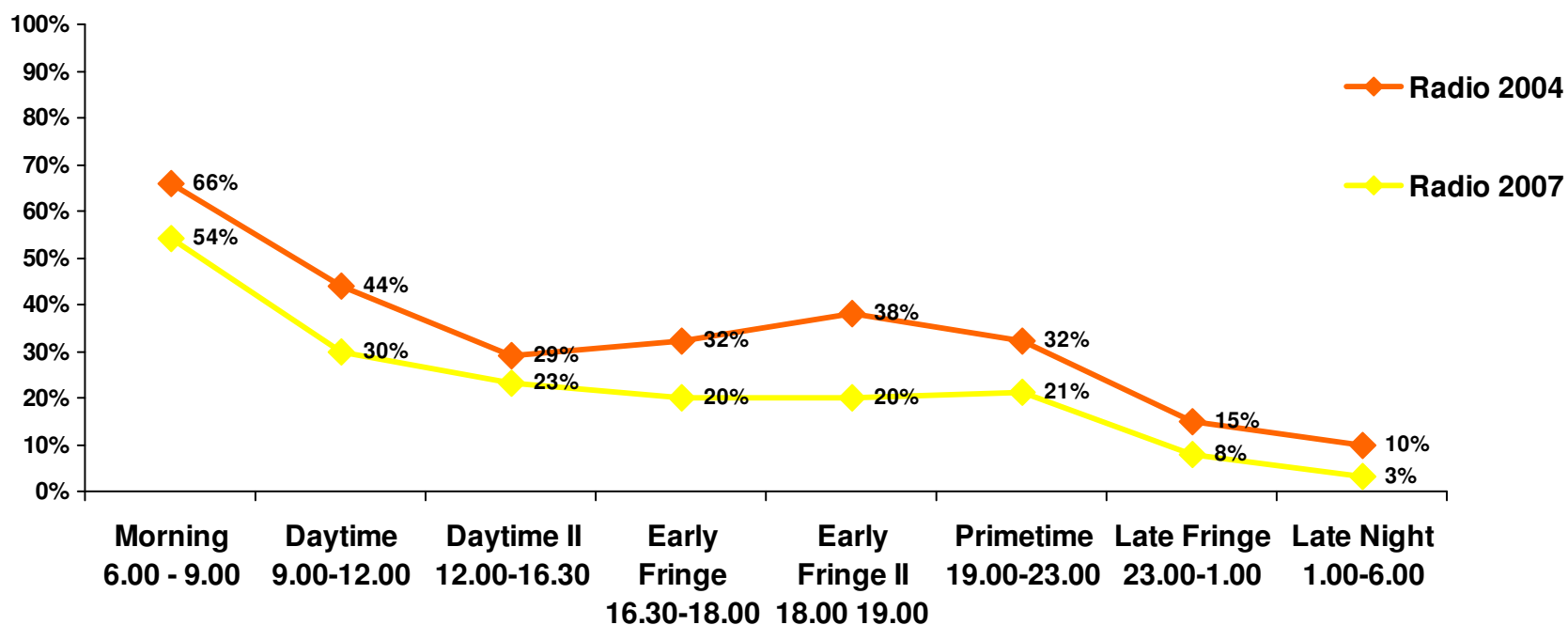
Q9. Between which hours did you read newspaper yesterday...?

Base: At work (weighted): 2006 (46780)

Radio listening has dropped significantly throughout the day in Europe

Chart 5 of 5

Total Media Audience by Day Part - At Work Users - RADIO



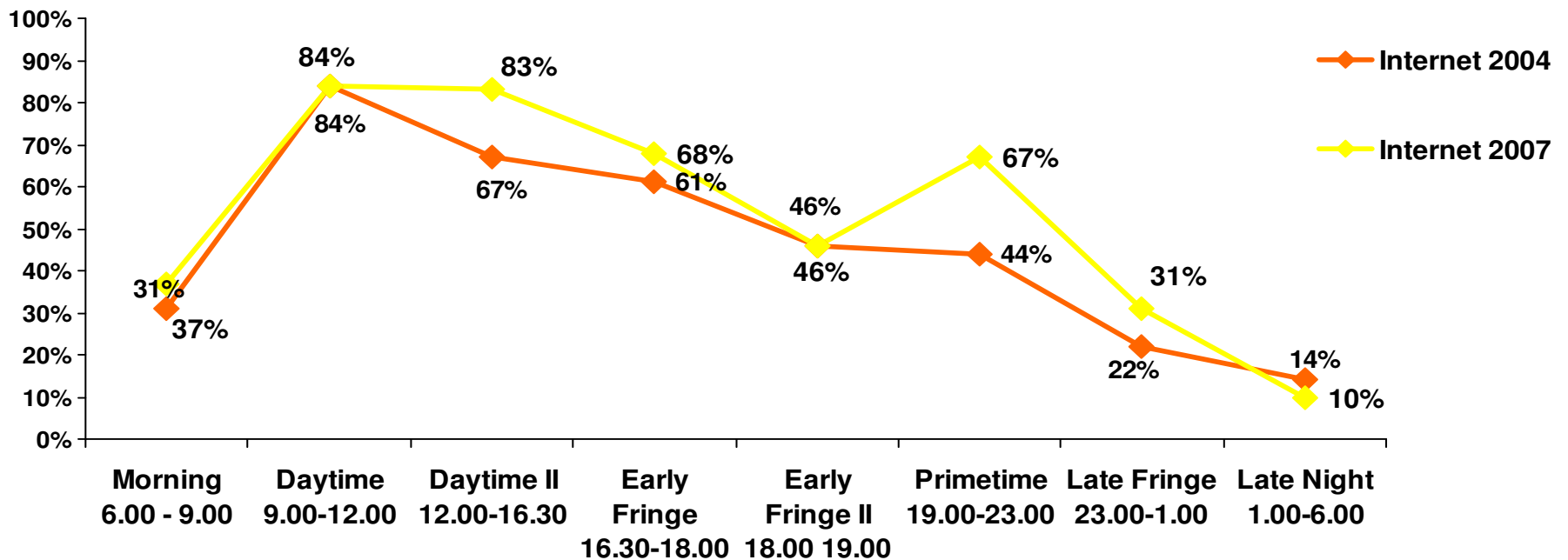
Q11. Between which hours did you listen to the radio yesterday...?

Base: At work (weighted): 2006 (60741)

European Internet use still highest in the morning, with a new peak during primetime

Chart 1 of 5

Total Media Audience by Day Part - At Work Users - INTERNET



Q13. How long did you spend on the Internet (for non-email purposes) yesterday, between...?

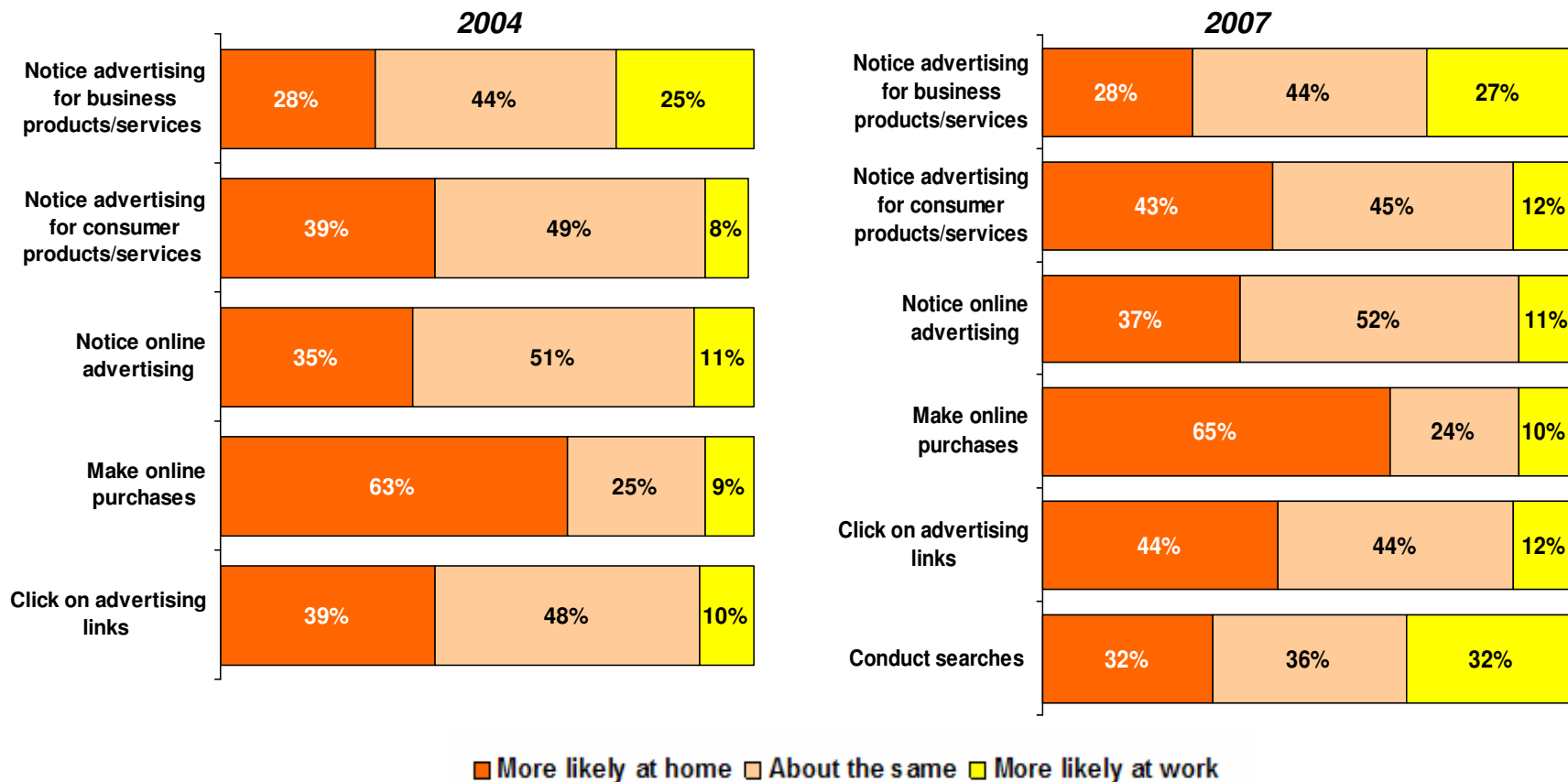
Base: At work (weighted): 2006 (91824)

Attitudes toward Online Advertising



In 2007, European Internet users still notice online advertising At Work

Location for internet based activities



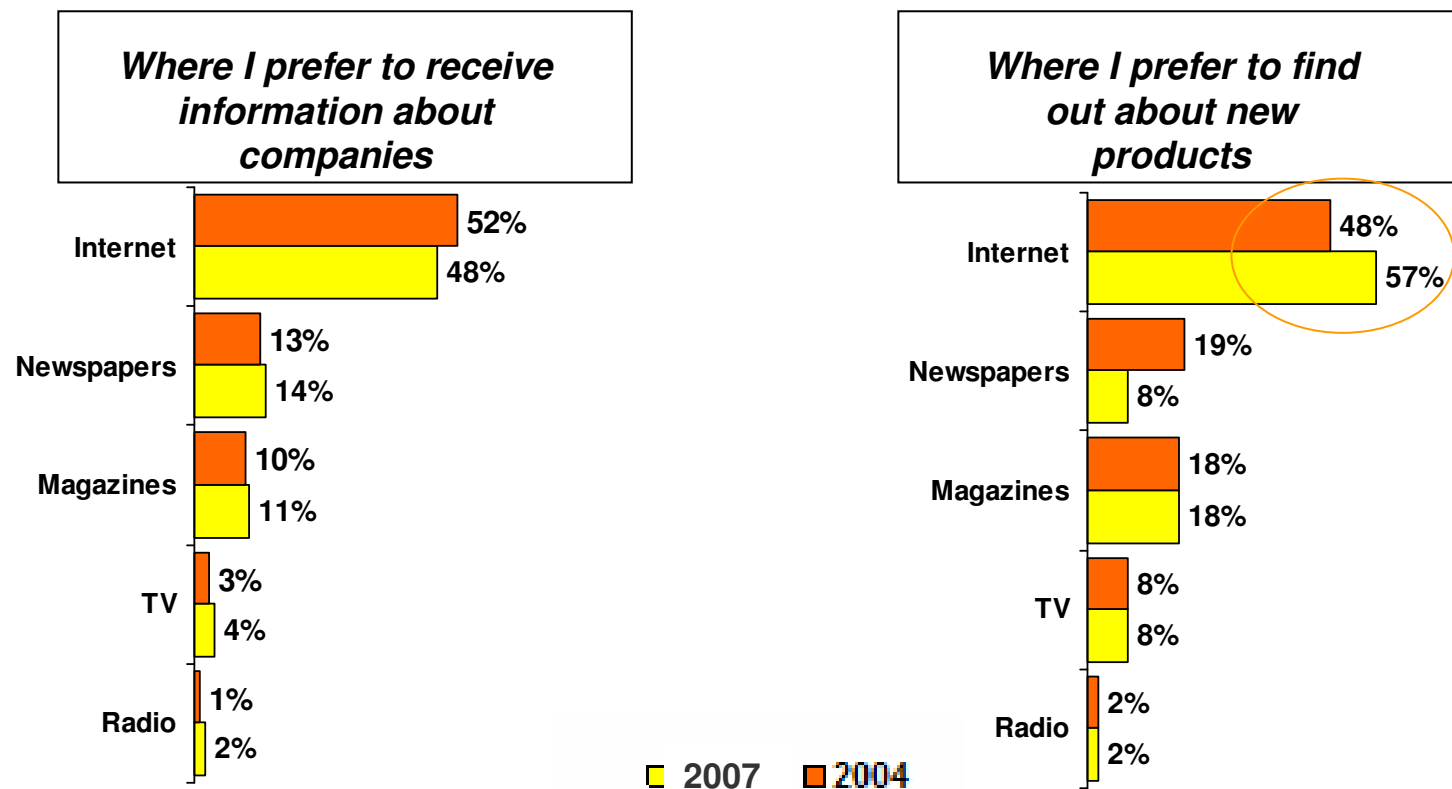
Q28. Thinking about your typical use of the Internet at work and home, where are you most likely to do the following?

Base: All respondents (weighted): 2006 (136154)

European At Work users largely prefer the Internet for new product information...

Chart 1 of 4

Preferences for advertising aspects by media type



Q26. Please give your impressions of advertising you see on each of the following media.
For each statement select all the media types you think apply

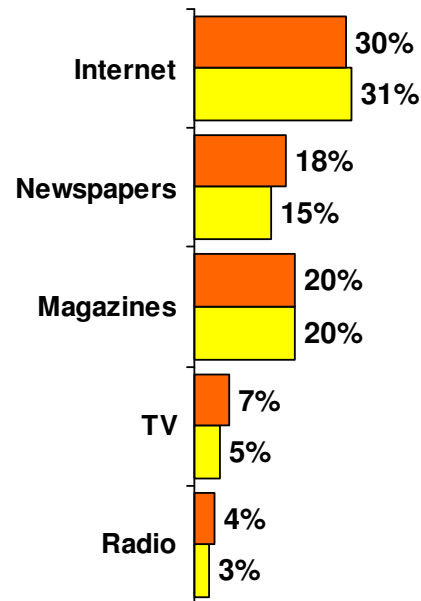
Base: At work users (weighted): 2006 (96318)

... and increasingly use online advertising to make purchase decisions

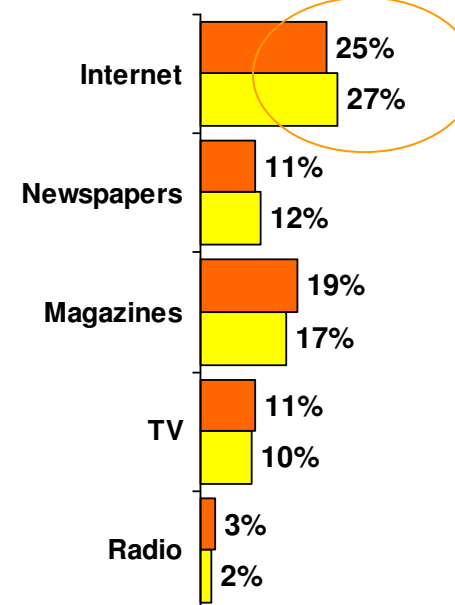
Chart 2 of 4

Preferences for advertising aspects by media type

Have advertising that is rich in information



Have advertising that helps me to decide what to buy



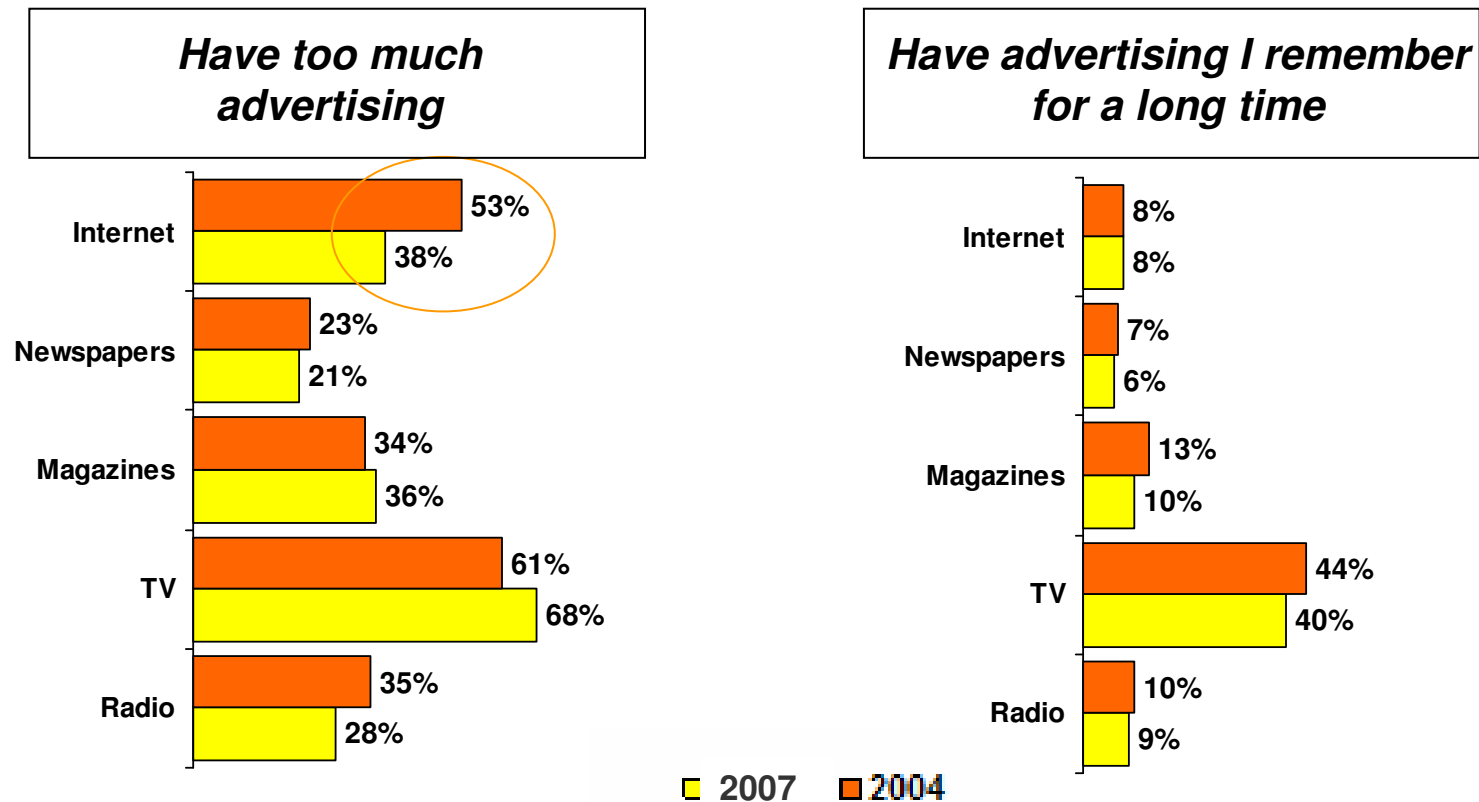
Q26. Please give your impressions of advertising you see on each of the following media.

Base: At work users (weighted): 2006 (96318)

European At Work users more tolerant of online advertising than in 2004...

Chart 3 of 4

Preferences for advertising aspects by media type



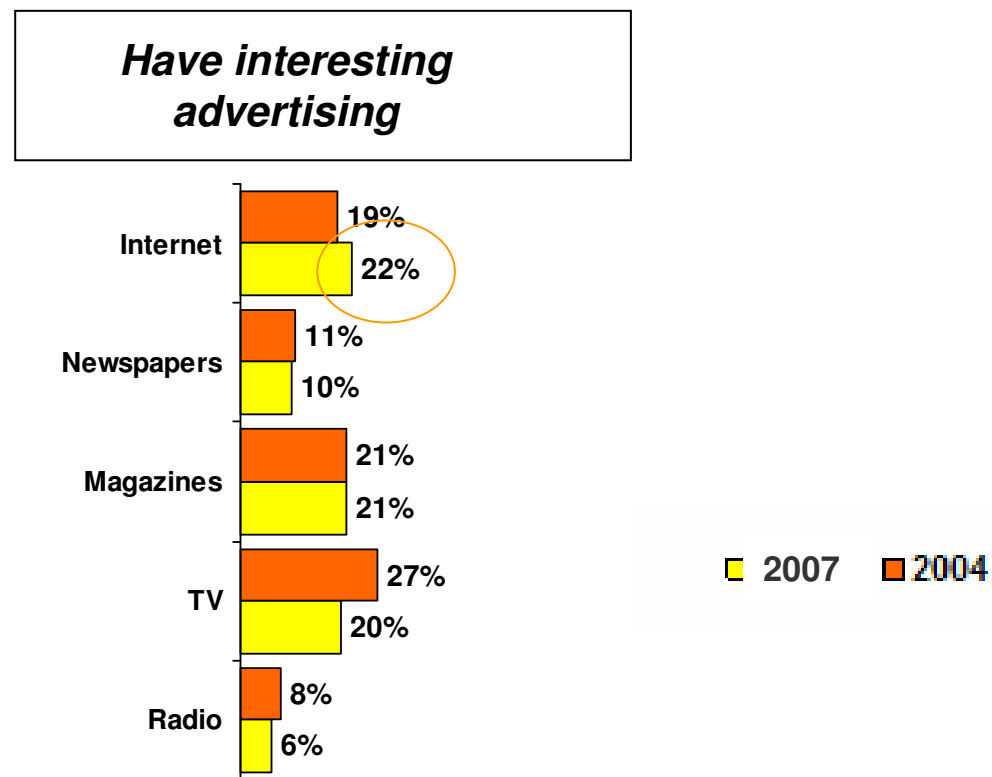
Q26. Please give your impressions of advertising you see on each of the following media.

Base: At work users (weighted): 2006 (96318)

European At Work users find online advertising more interesting than any other

Chart 4 of 4

Preferences for advertising aspects by media type



Q26. Please give your impressions of advertising you see on each of the following media.

Base: At work users (weighted): 2006 (96318)

Conclusions – online advertising reaches a high potential client base At Work

- Media consumption habits have definitively changed – **Internet now dominates daytime AND primetime media consumption** in Europe
- Visiting **news and information sites is the number one reason** European “At Work” users access the Internet
- Internet advertising considered the most **innovative, informative and relevant**

Notes on Methodology

- Study conducted online on several OPA Europe member websites between June 2006 and January 2007
- More than 7000 responses were analysed across Europe
- Data from respondents residing outside the 6 countries polled – France, Germany, Italy, Spain, Switzerland and the UK– were not used

**When reproducing results, please cite your source as
“OPA Europe Internet Use At Work Media Consumption Study 2007”**

(NB: Switzerland was not included in the 2004 study)



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**For more information on the
Internet At Work Media Consumption
study, please visit
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