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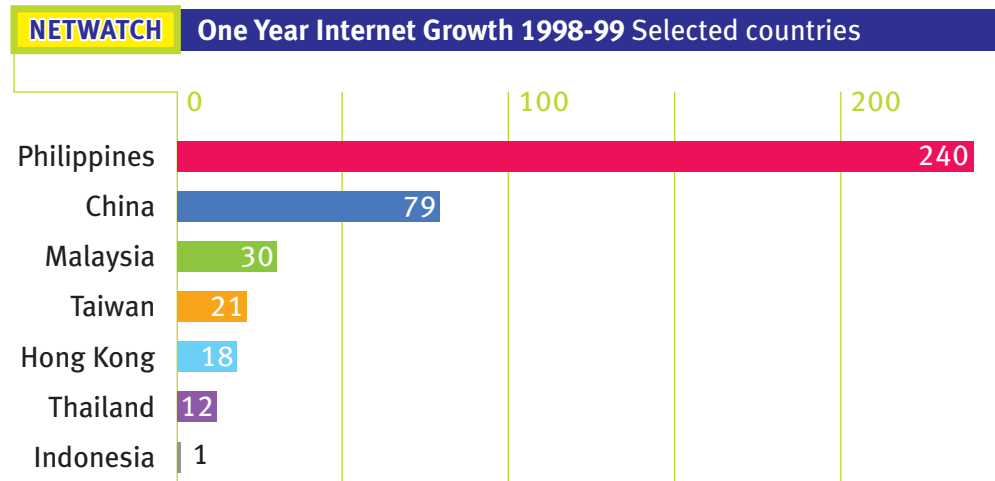
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NETWATCH

ACNielsen NetWatch: An International Survey of the Internet

As a harmonized measurement of the international Internet community, the ACNielsen NetWatch tracking study offers an understanding of Internet users across and within major regions of the world. NetWatch covers 16 countries and surveys 149 thousand individuals, capturing the phenomenal growth of this new medium.



(Note: Ages of those surveyed range from 10+ to 18+ according to country).

Since its inception only two years ago, NetWatch is now answering the “who, when, where and what” questions of Internet users in North America, Europe, South Africa, and Asia Pacific. Importantly, NetWatch is identifying Internet user trends on a global scale while also exploring the interplay between local factors and Internet growth.



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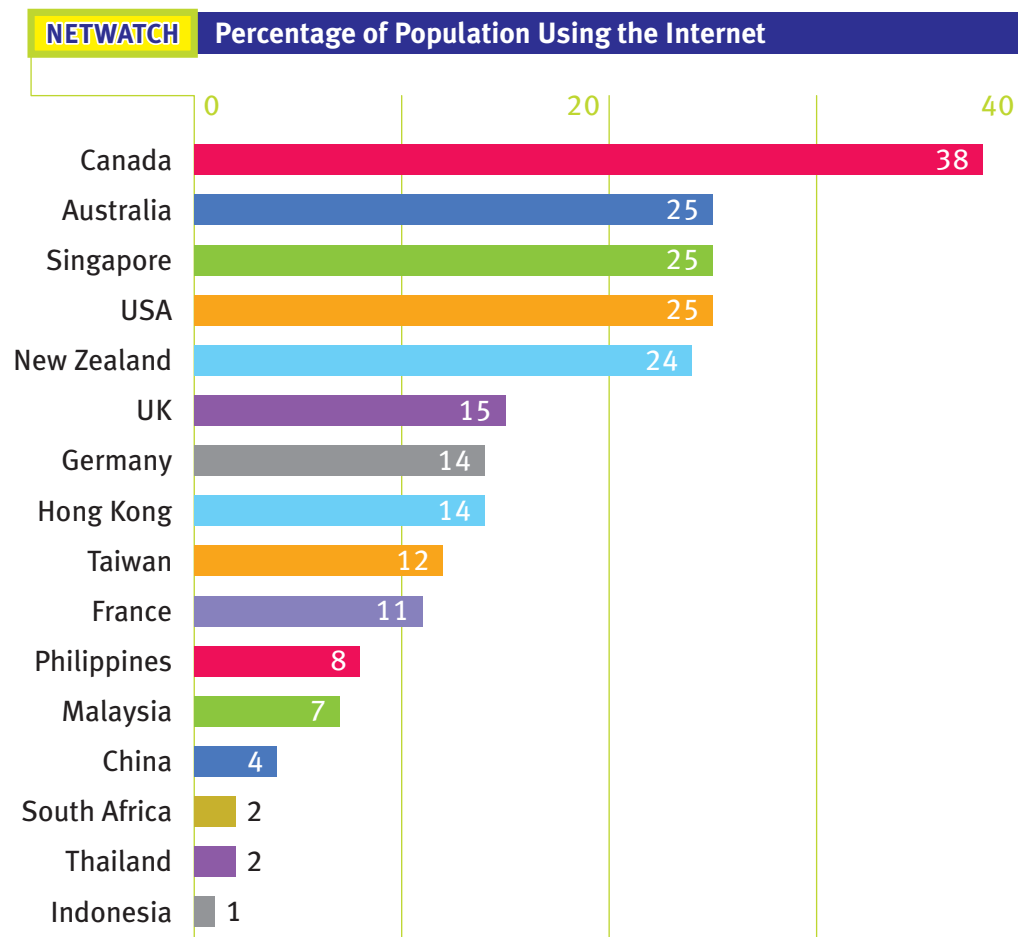


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Who is using the Internet?

The USA may be first in sheer numbers of users (projected to be 55 million by the year 2000), but Canada far exceeds any other country in terms of Internet penetration. Four out of every ten Canadians use the internet! What makes Canada so unique? As with other countries with high levels of Internet users, it is a mature economy with an excellent telecommunications structure and a supportive government environment.



(Note: Ages of those surveyed range from 10+ to 18+ according to country. UK and France based on house holds. China based on 3 core cities).

Regional blocks of Internet use become apparent with North America and some Asia Pacific countries well ahead of Europe in terms of the proportion of the population who are Internet adopters. Are the “newer” economies more receptive to new technology? If so, there are broad implications here related to the information provided by the Internet. These implications span consumer choice, business competitiveness, and education.

Those currently buffeted by severe economic problems, such as South Africa, Thailand and Indonesia, are behind other countries in the Internet revolution. But again, more appears to be at play here in explaining Internet usage than just macroeconomics. Hong Kong has just half the level of Internet usage as Singapore, yet these economies are in many ways similar. Why the disparity, then, in Internet adoption between the two urban societies? Perhaps part of the reason is because of the determined Singapore government strategy to remain competitive through aggressively promoting interactive technologies.



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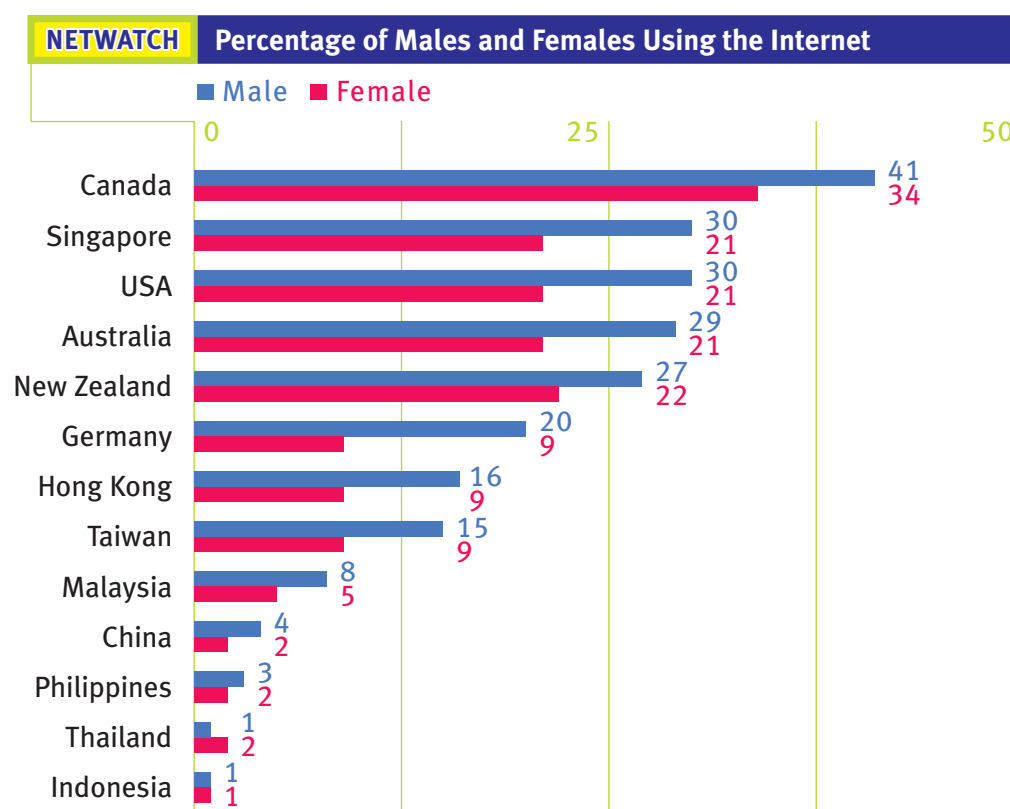


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Who isn't using the Internet?

NetWatch has found that in most of the world those not using are disproportionately female. The Internet is apparently a predominantly male domain. With this finding, a key research task ahead is to identify the barriers that prevent the "virtual emancipation" of women. The challenge of overcoming these barriers will be rewarded by the gain of millions of new Internet converts, and will concomitantly greatly expand the marketing potential of the Internet.



Note: Ages of those surveyed range from 10+ to 18+ according to country. China based on 3 core cities.

Across countries, Internet users tend to be from the management and white collar strata of society. This becomes more pronounced in countries with lower Internet penetration, such as Germany, and less pronounced in countries with higher Internet penetration, such as Canada. Students also represent a significant Internet audience, underscoring the truism that the Internet is indeed the communication medium of the future.

Within countries, more subtle demographic variations of Internet users exist. This is just the sort of information that NetWatch in conjunction with other ACNielsen measurements is collecting. For example, we found that in New Zealand those who drink wine are more likely to be Internet users than those who do not drink wine. In New Zealand, marketers who want to understand the attitudes and behaviours of Internet users might start with what they already know about wine consumers.

Internet access – at home or work?

NetWatch has found that for most Internet users access is from home and not work. Trend data for Canada and New Zealand suggests that home access is growing faster than work access. Only Indonesians reported a higher level of access at work, perhaps indicating that computer ownership is currently outside of the personal budget of most Indonesians. Two other Asian countries, Singapore and China, have high (over 50%) incidence of Internet use at both work and home, but we did not find that this was the case elsewhere in Asia Pacific, or in other developed countries. Interestingly, we found through NetWatch that the Philippines stood out from other countries as a place where many users appear to gain their access solely from "cyberspace" cafes.



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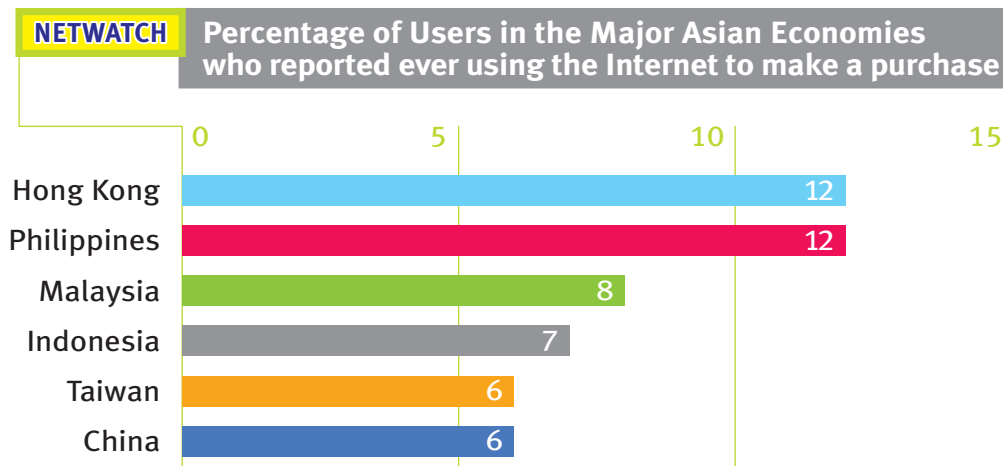


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e-commerce opportunities

The use of the Internet for purchasing goods and services has, of course, enormous potential. This potential, however, remains largely untapped as evidenced by Netwatch results for Asia's leading economies. In these economies, less than 2 in 10 Internet users reported making even one purchase over the Internet.



Converting Internet e-mailers into Internet shoppers will be an important goal of marketers. Currently, however, purchasing a product on-line is not ranked highly by respondents in any country as a reason for Internet use. In fact, Netwatch has found that in many countries the number one ranked reason for using the Internet is to send and receive e-mail. For providers of products and services, the challenge is to tackle the e-mail fraternity, and stimulate them into trying other services available on the Internet.

Identifying your Internet audience

Certainly, there exist specific and substantial Internet audiences for targeted marketing. Valuable information of the type discussed above is being gleaned from continuous tracking with NetWatch. It could not yet be said, however, that there are truly "mass" audiences of interest to, say, manufacturers of fast moving consumer goods. The Internet remains a complex and highly dynamic medium. The patterns of adoption, by demographic and by country may be taken as a guide on how the Internet expands, and understanding these patterns will be useful intelligence for strategic planning horizons.



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NETWATCH

Information available on NetWatch

Internet usage:

- Total number of people using internet
- Profile of internet users
- Products ownership/services usage and lifestyle of internet users

Internet using habits:

- Recency and frequency of using internet
- Place of using internet
- Time spent using internet
- Purpose of using internet
- Activities on the internet
- Money spent on accessing/using internet each month

Contacts

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