



JSH&A Public Relations



2009 Women's Media Habits A JSH&A LIF™ Style Survey

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2009 Women's LIF™ Media Habits Survey

We live in a cluttered and noisy environment. This is especially true for women who often operate on a 24/7 schedule whether at work or at home. For marketers targeting the influential woman's market, the break-through challenge to gain share of mind becomes greater everyday.

The media landscape is dramatically changing as the Internet gains speed and the printed word is being left in the dust. Major daily newspapers, which we have long-relied on or news, entertainment, guidance on planting our tulips or growing our 401K, are moving from the printing press to mobile technology. We no longer wait for the morning paper to be delivered. We easily access the latest news from the online *New York Times* whenever and wherever we want. The *Christian Science Monitor* was the first paper to announce the burial of their print version replaced by the birth of the *Monitor* online. Other print dailies, such as the *Seattle Post-Intelligencer*, *Boston Globe*, and *Chicago Tribune*, face financial challenges while their online presence grows.

The Migrating Media Landscape

- We're moving from *Mass of Media* to a *Mass of Media*.
- *Print* is declining while *digital* is on the rise.
- *Confusion* in broadcast with a multitude of cable and independent stations is expanding with a *profusion* of podcasts and vodcasts.
- A defined *media pool* with known "beat" reporters is transformed by a *Blogger Tsunami* with everyone from the CEO to the neighbor next door serving as journalists with varied perspectives.
- *Scheduled news* delivery, both the morning paper and the evening TV newscast is losing out to *immediate news* online, when and where you want it.
- *Reporting* the news has migrated to a *conversation* involving the community.

According to a recent Harris Poll, 52% of all women have a Facebook or MySpace account – but only 18% update their page on at least a daily basis. Only 5% of all women use Twitter, though it's popularity is rapidly growing. And 47% of all women report they use none of the social networks.



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Finding Media That Finds Women

As LIF™Style public relations experts charged with communicating with women, our task is to identify media resources that will effectively reach and impact our target audience. The driving questions today are:

- Where are women migrating for their news?
- Who are the new Voices of Influence?
- How do we reach women in a relevant way?

Realizing we didn't have valid answers to those questions, JSH&A conducted a survey of 500 women to determine Women's Media Habits in our current world of media evolution. Our results follow.

Women in Migration

The JSH&A 2009 Women's LIF™ Media Habits Survey identified four categories of women and their migrating media habits:

- **Wired Women** – younger, web-savvy, heavy online users who place trust and credibility in online sources.
 - 23% read local newspapers online on a *daily* basis. 22% *never* read a print newspaper.
 - Half watch the evening news on TV, of those, 20% rely on CNN. 18% do not watch TV news.
 - FM radio is preferred by 80%.
 - 96% are online – 71% of those are online three or more hours daily.
 - Trust internet sites for good information and are less likely to be influenced by traditional media reporters (44%).
- **Transitionals** – migrating online, but still utilizing a variety of media sources both on- and off-line.
 - 19% read a hard copy of their local newspaper daily, 16% never read the printed paper. 19% read the local paper online.
 - 66% subscribe to at least two magazines with Family Circle/Woman's Day and Better Homes & Gardens popular picks.
 - Their television viewing is likely to be the evening news, followed by morning news and food/cooking programs such as Martha Stewart and Rachel Ray.
 - 96% are online and 49% spend three or more hours online daily.
 - They are more likely to trust a variety of sources for information including Internet sites, personal referrals and then the news media and not likely to be influenced by media reporters (40%).



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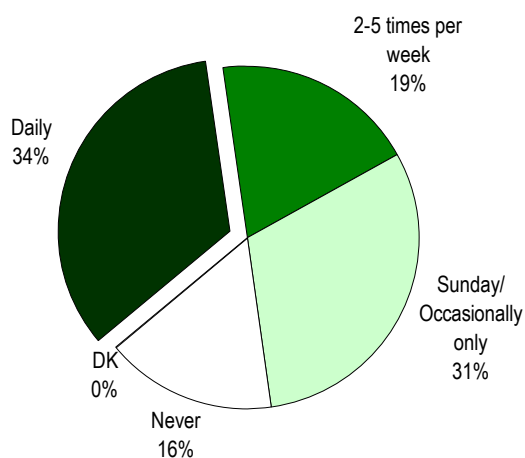
- **Dabblers** – tending toward traditional media, but dabbling online, and more likely to be watching television evening and morning news.
 - 24% read the local paper daily in hard copy, 19% never read the local paper. Only 9% read the paper online.
 - Half subscribe to two or more magazines.
 - 55% watch the evening news, but less than half (39%) watch morning shows such as GMA, Today or The Early Show. Food/Cooking shows are most popular.
 - 92% are online for personal reasons, 29% spend three or more hours online daily.
 - More likely to trust family/friends for information and somewhat likely to be influenced by TV anchors (30%).
- **Groundeds** – dependent on traditional media sources and respectful of news journalists, while using the Internet for personal connections through email.
 - 54% read the local paper daily in print form, only 12% never read the local paper. Only 4% go online for the daily news.
 - 52% subscribe to at least two magazines, 30% subscribe to none.
 - Most likely to be watching the evening news or the morning news.
 - 67% are online, but only 12% are on for three or more hours daily.
 - More likely to trust newspaper, magazine or TV reports for information.
 - Their opinions and decisions are most influenced by TV anchors such as Katie Couric or Brian Williams (40%).



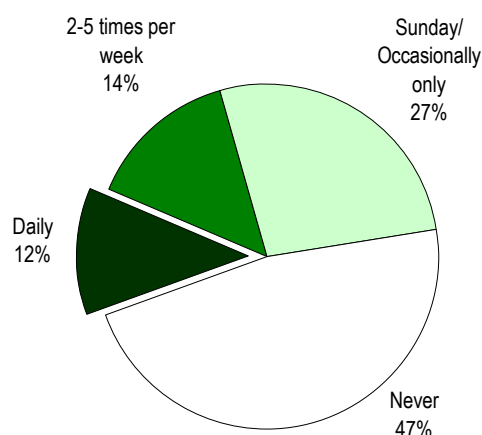
Newspaper Readership: Women Still Prefer Print vs. Online

While online readership is definitely growing, four out of five women remain loyal to the print version of their newspapers.

- **84%** of women still **read hard copy** versions of their local newspapers – **one in three (34%) read the print paper daily**.
- **53%** of women read their local newspaper **online** – **but only one in ten (12%) read online daily**.
 - 23% of **Wired** women find daily news online
 - 19% of **Transitionals** go online for daily news



Print Newspaper Readership



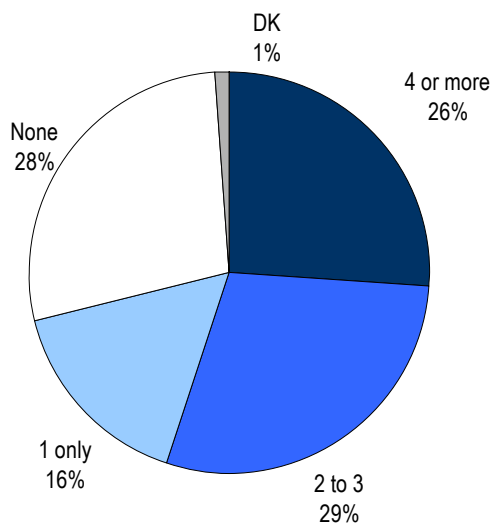
Online Newspaper Readership



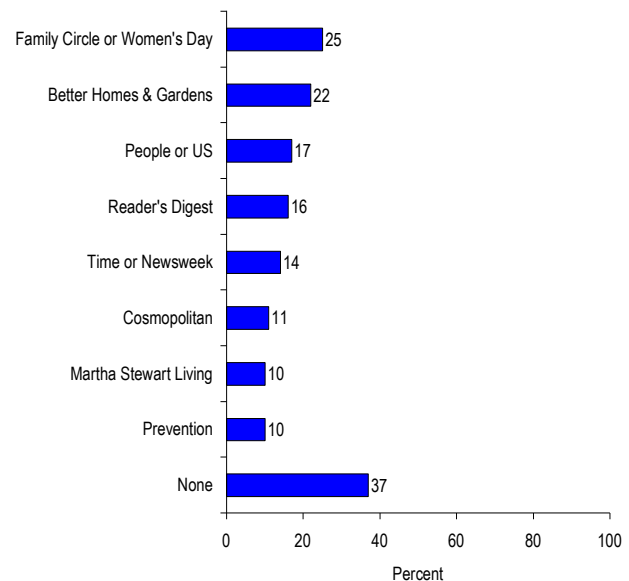
Magazine Readership:

Three out of four women can be reached through magazine subscriptions alone

- Magazines continue to be very popular with women. Almost three-quarters (**72%**) **subscribe to at least one magazine**; more than half (55%) subscribe to two or more, and 26% subscribe to at least four.
- Younger, **Wired** women are more likely to read the most popular magazines (*People*, *US*, *Cosmo*) on a regular basis while they also index high on news magazines such as *Time* or *Newsweek*. Of the ten most popular magazines, seven index higher than the average among women under age 30.
- **Transitionals** expand their magazine reading adding family and shelter publications such as *Better Homes & Gardens*, *Martha Stewart Living* and *Family Circle*.
- **Dabblers** and **Grounded** women rework their magazine rack focused on the family and shelter publications and eliminating the pop scene.
- 50% of the magazines are sold in supermarkets, according to John Harrington, publisher of *New Single Copy*, an industry newsletter covering the magazine business. While the JSH&A study looks only at subscription habits, it's conceivable that readership frequency is close to double what is represented in this survey.



Magazine Subscription Rate



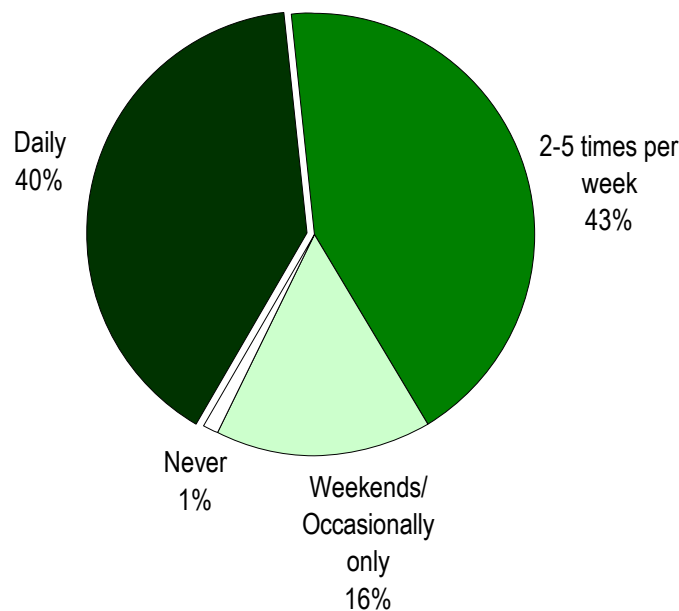
Popular Magazines



Television News:

Reaches nine out of every ten women

- **87%** of women claim they **watch TV news** and can name the television station they "most rely on" for news.
- Among total women, almost a quarter of them (23%) rely most on Fox national and local news.
- In order of preference, Fox news is followed by NBC and national and local news (17%), ABC national and local news (14%) and CNN (13%).
- The youngest group of women ages 20 to 30 ("**Wired Women**") are least likely to have a TV station they rely on most for news. **Almost one in 5** (18%) say they **don't watch the news on television**.
- **84%** of women **watch morning TV shows** at least twice a week; 40% watch on a daily basis.



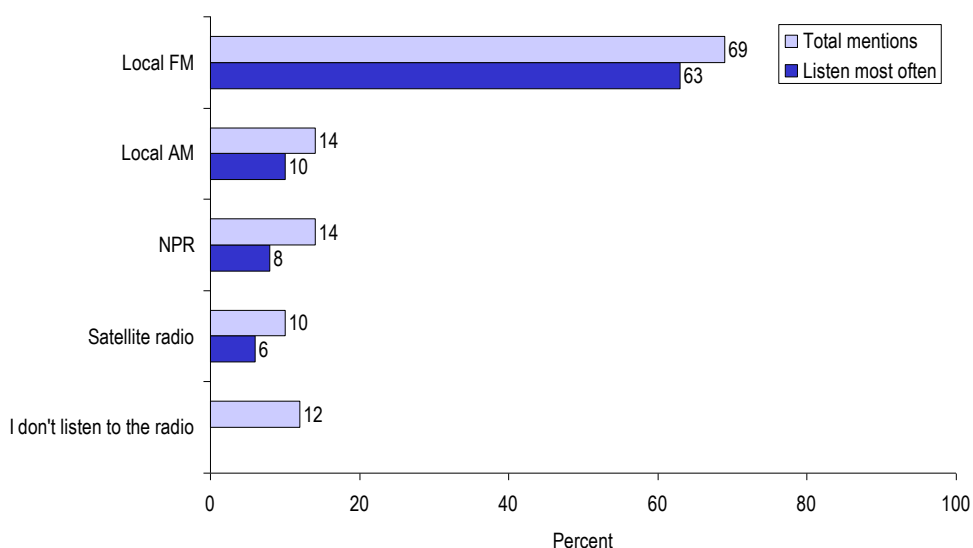
**Viewing Frequency for Women
Who Watch Morning TV Programs**



Radio Audience:

Nearly nine of ten women are tuned-in to radio

- **87%** of women surveyed **listen to the radio**.
- **72%** listen to **local FM** stations most frequently, followed by National Public Radio (12%).
- Almost **three out of four** (73%) radio listeners are tuned in **to music**. Both talk radio and radio news draw a smaller audience (14% and 11% respectively).
- For **Wired** women, 85% are tuned into music.
- 12% of all women state they do not listen to the radio.



Radio Station Listening Habits



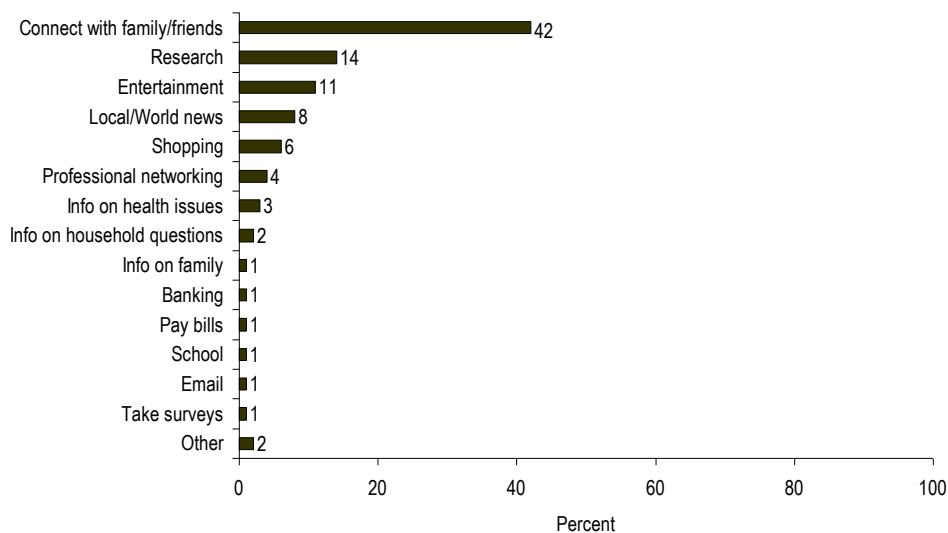
Internet Usage:

Almost everyone is online - Six out of ten women spend two or fewer hours

- **83%** of all women state that they **use the Internet** for personal reasons.
- **Wireds** and **Transitionals** are most likely to be online (96% each group) along with **Dabblers** (92%).
- 71% of women aged 51 to 70 are online and almost half of women **71 to 80 are online (45%)**.
- **"Connect with friends and family"** is the most often cited reason (42%) followed by "Research" (14%).

While women have migrated online and begun to embrace the ability to connect with email or to conduct research for a vacation or health issue, etc., expansive use of the online community is driven by generational adaptation.

- Approximately **60%** of all women **spend two or less hours** on the Internet each day.
- Seven in ten women **ages 20-30 (Wireds)** are online for **three or more hours daily (71%)**. Only half of **Transitionals** (49%) claim to spend three or more hours online. Time continues to drop off significantly with women over the age of 40.
- Entertainment/Games is popular with **Wireds** (13%) and **Transitionals** (16%). Online shopping attracts less than 6% of all women surveyed.



Reasons for Going Online

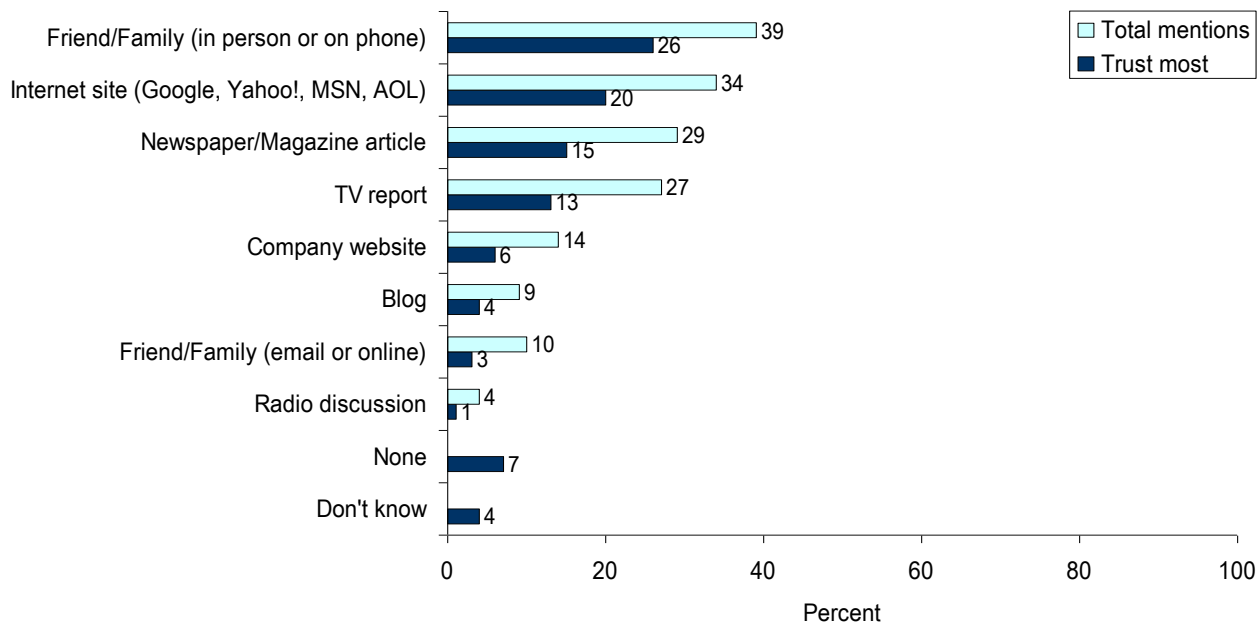


The New Influentials:

Friends, Internet and Traditional News are Equal

Identifying the migration of women's media habits needs to be understood in terms of the Trust Factor. As the delivery vehicles and reporters for "news" and information evolve, the critical question becomes who will provide a credible third-party endorsement to drive public relations initiatives? While a good word from Oprah will always send sales flying high, will a recommendation from Heather Armstrong, or as she's known to her blog fans, Dooce, carry the same weight?

- "Family & Friends" remain a trusted source of information according to 39% of respondents.
- **Internet sites such as Google, Yahoo!, MSN & AOL have now slightly surpassed the news media including both print and broadcast (34% online sites to 32% traditional media), and are close to equal to "family and friends" as a trusted source to provide good information about a product or service.**



Trusted Sources for Good Information Re: Product or Service



Conclusions:

Women are multi-taskers – they require multi-channels. Their brains are highly wired with interconnecting circuits constantly processing millions of bits of information related to their life, family, job, community, hopes, fears, needs and aspirations.

More than ever before, the current environment of media migration demands that marketers deploy **360° communication outreach strategies** specifically designed to reach the target market when and where she is listening. Lifestyle drivers are key to message development and conversation engagement and the key to communication delivery vehicles.

Successful publicity campaigns must fully integrate the still powerful traditional **news and media resources with targeted online communications vehicles** – including online news sites, company Web sites, blogger communities and social media – further **enhanced with the word-of-mouth community** of girlfriends and family.

The New Communications Formula is:

Mass of Media + Mass of Messages = Mass of Mindshare

The critical component is targeted message delivery. The messages must be relevant to the target audience and the media delivery systems must actually reach the intended target. A strategy involving only social media will reach only the highly **Wired** and some **Transitionals**. If the goal is to reach a broader audience, broader media tactics must be implemented to drive awareness and participation. **Dabblers** and **Groundeds** can be driven to take part in a compelling online contest if they first learn about it from their favorite newspaper, magazine or TV programming.

We know that the online, digital universe is rapidly expanding and evolving with the outer limits yet unknown. Traditional media is also evolving in yet-to-be-determined directions. And, word-of-mouth is being formalized to provide one-to-one connections with meaningful impact. **The bottom line is that all delivery systems must be integrated for synergy.** Online, traditional, WOM, - all are valid, even critical components to an effective communications strategy. Women operate in a noisy and multi-faceted environment requiring a multi-faceted communications strategy that is meaningful to their lifestyle.

Survey Note:

The **JSH&A 2009 Women's LIF™ Media Habits Survey** was conducted by JSH&A Public Relations with Precision Research in April 2009. Data collection was completed via phone interviews and online surveys with a total of 500 randomly selected women between the ages of 20 to 80. Respondents in each ten-year age grouping reflect the U.S. Census population.

