



Online Publishers
Association

The Silent Click: Building Brands Online

June 2009

Conducted in partnership with





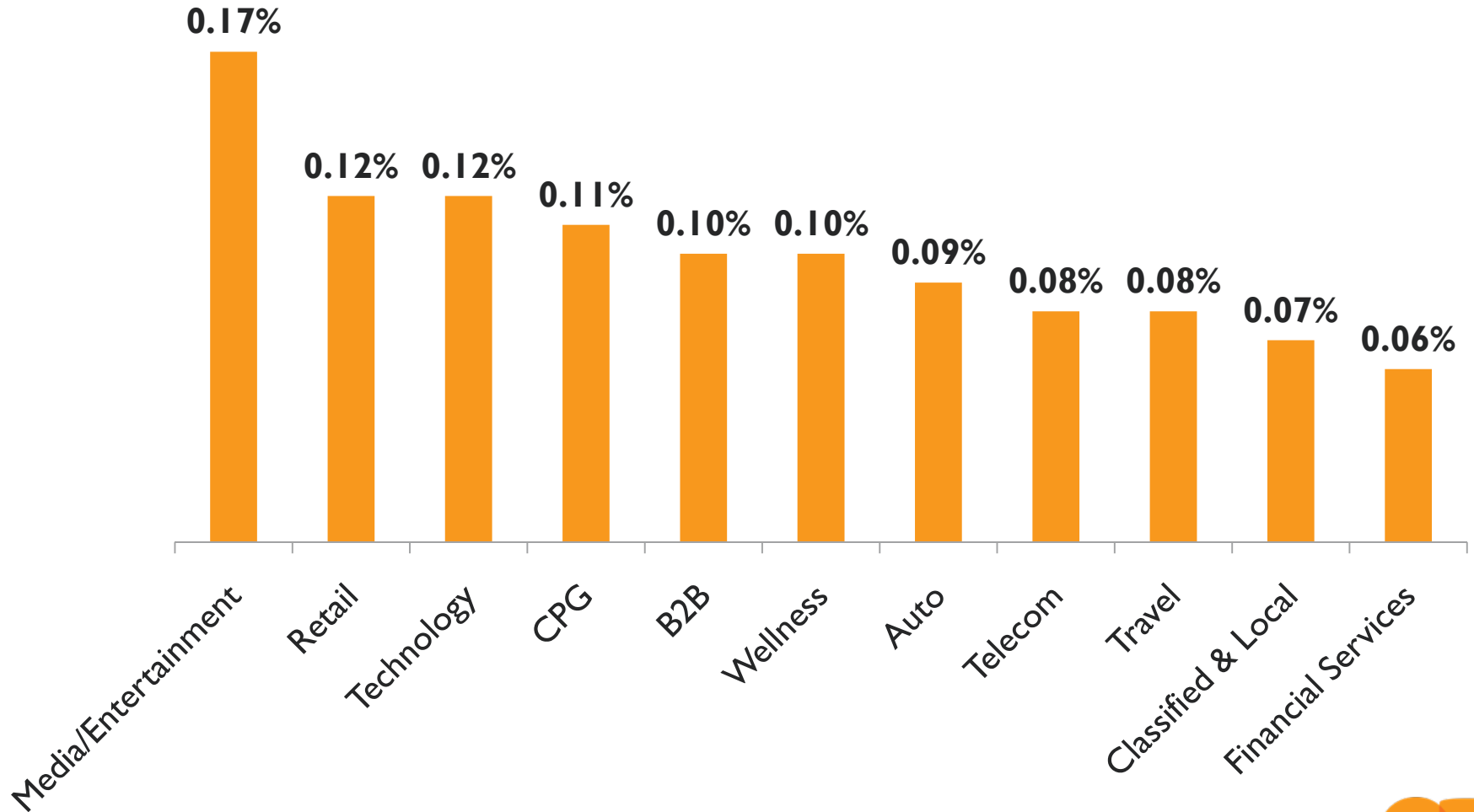
Research Objectives

- Demonstrate online advertising's role in building brands and achieving key branding goals
 - Discern relevant behaviors that correlate with online ad exposure
 - Understand the role of environment in attracting a valuable consumer



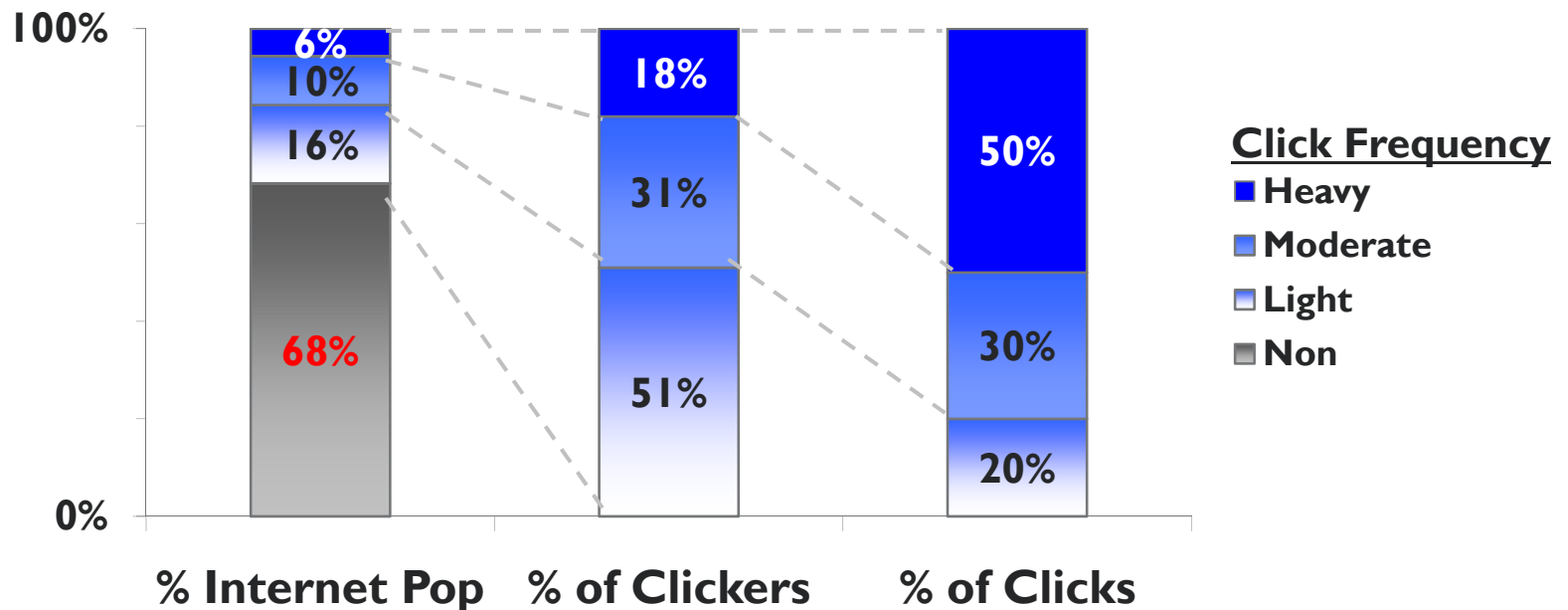
So Many Ads, So Few Clicks - BusinessWeek

Rich Media Click-Through Rates by Industry



Ad Clickers Follow the 80/20 Rule

- Despite only representing 16% of the Internet population, moderate to heavy clickers account for 80% of display ad clicks in the month analyzed
 - Clickers are predominately younger (24-44 age range)
 - Clickers tend to be lower income (under \$40K)
- Two-thirds of Web users didn't click





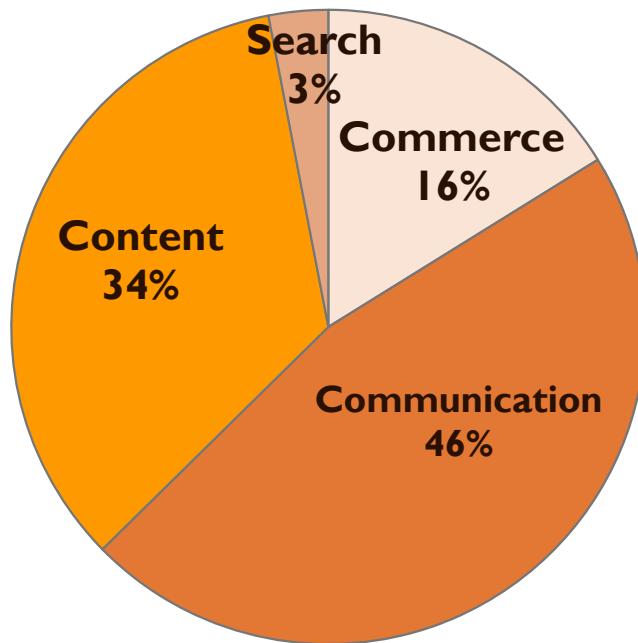
If Not the Click, Then What? - Ad Age

- *[The click's] the closest thing to a standard, but it doesn't mean anything to anybody, and CMOs are just tired of hearing about it.*
 - Andrea Kerr Redniss, Senior VP Digital, Optimedia
- *Remember why you're advertising...You are not advertising for clicks...What you're advertising for is to sell me stuff or change perception, and that's what we need to be measuring against.*
 - Carrie Frolich, Managing Director Digital, Mediaedge: cia
- *By measuring the last ad seen or clicked by a converter, they focus entirely on a brief time span at the bottom of the funnel. Evaluating only a single point of advertising contact oversimplifies the delivery and performance of any media channel.*
 - Microsoft's Atlas Institute

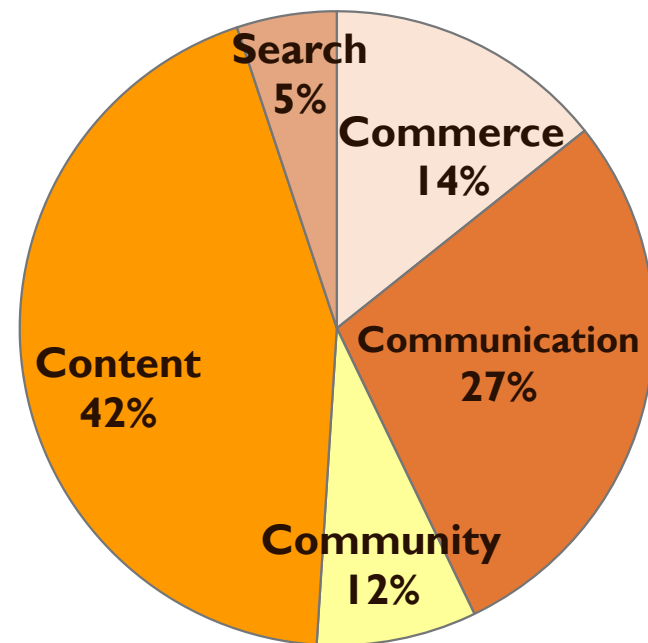
How Consumers Spend Time Online Has Changed Greatly the Last 5 Years

- Consumers now spend over 40% of their online time with Content, and only about one-fourth of their time with email and IM
- Community is a relatively new and growing segment

Share of Online Time, 2003



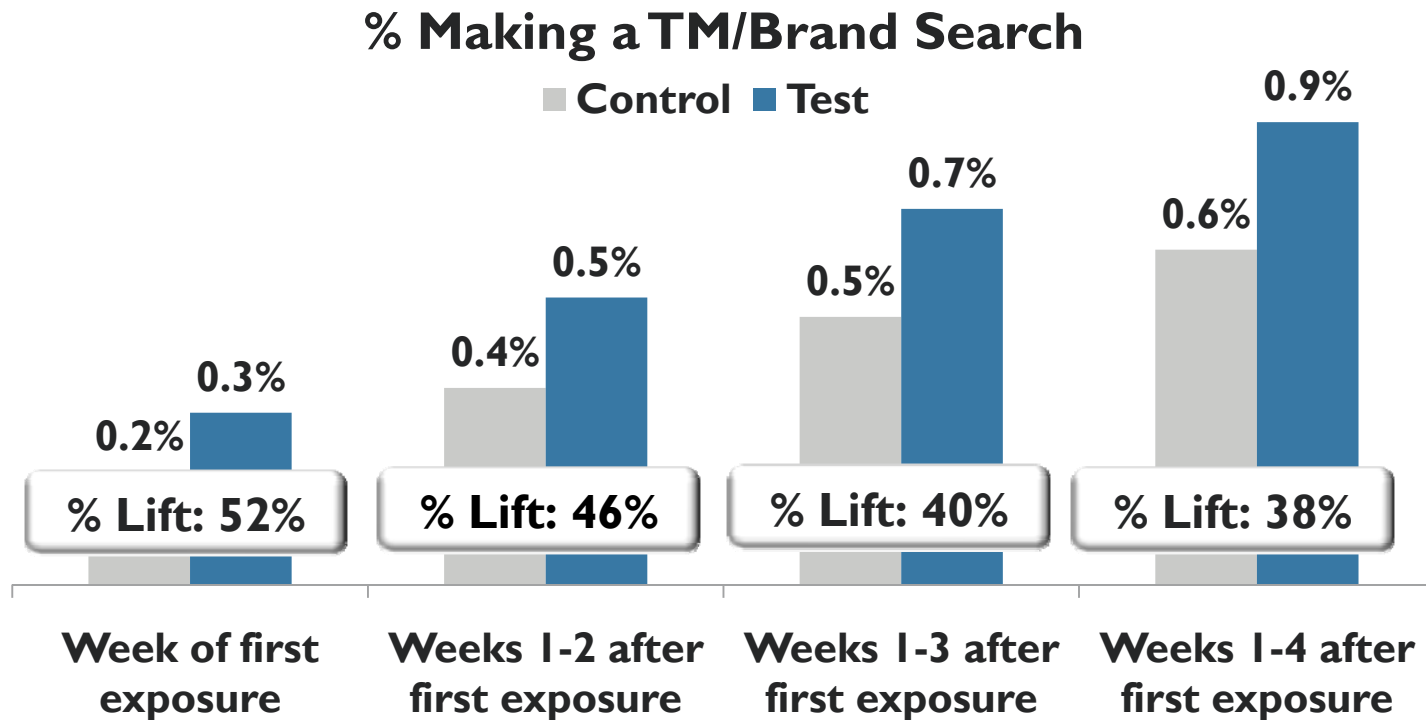
Q1 2009



Display Impacts Search 4 Weeks After Exposure

Source: comScore "Whither the Click?" as published in June 2009 Journal of Advertising Research

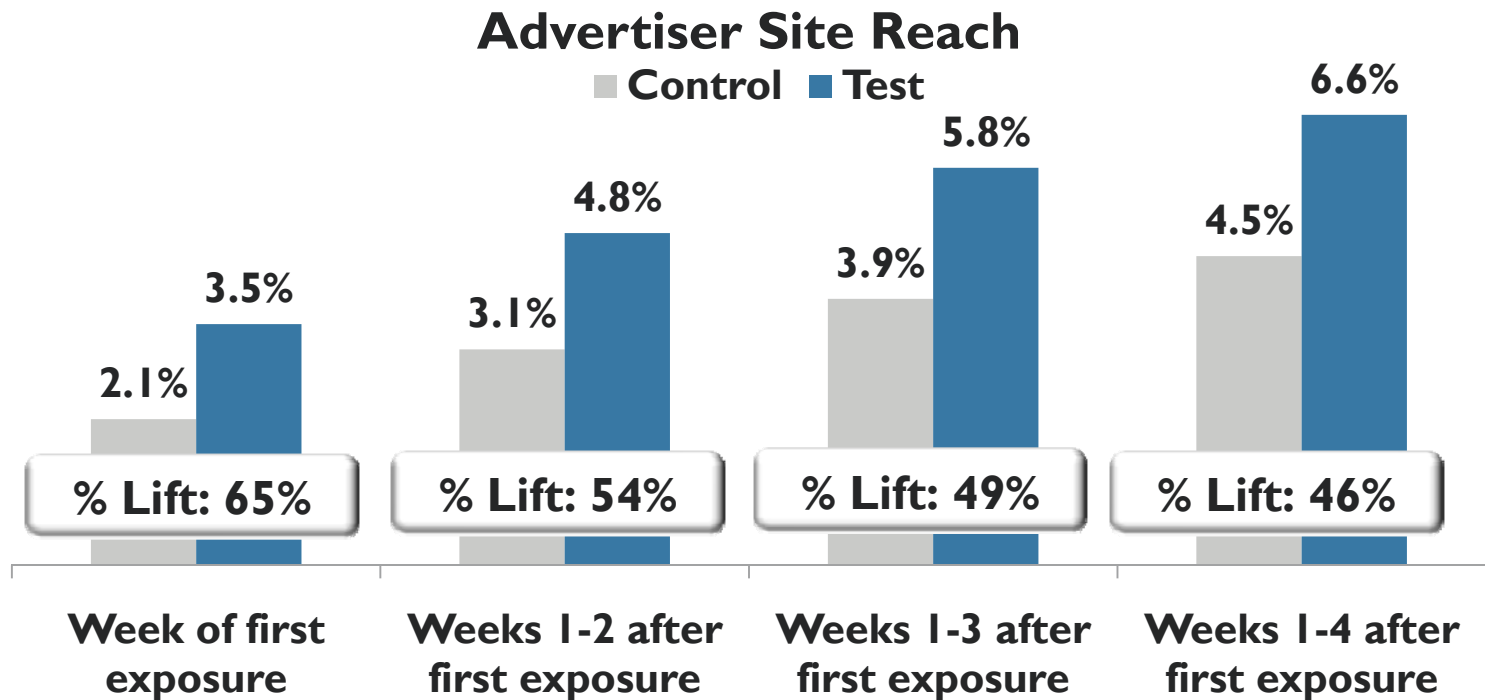
- This dynamic is important because of the synergy between display ads and search, and because a Trademark or a Brand search is a significant indicator of purchase intent



Display Ads Also Drive Traffic to Advertisers Over Time

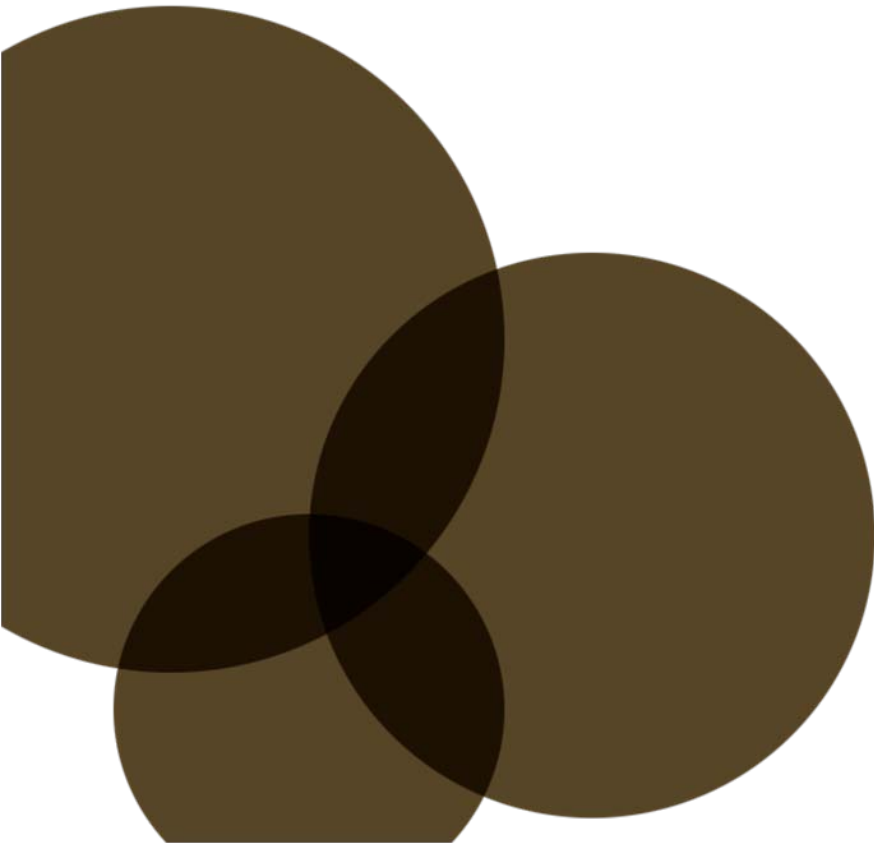
Source: comScore "Whither the Click?" as published in June 2009 Journal of Advertising Research

- Display advertising's ability to drive traffic is persistent
- These significant lifts would be overlooked by only considering immediate actions (e.g., a click)





Methodology





Methodology

- Methodology:
 - Data source: comScore's proprietary online panel that passively tracks the online behaviors of 1 million United States Internet users
 - Findings are based on four popular online categories and measuring their audiences' interaction with the most pervasive advertisers
 - Site categories: Business News, Entertainment, News, Sports
 - Findings are based on the aggregate roll-up of visitors to the top 50 sites in each category, as determined by January 2009 Media Metrix unique visitor data



Methodology (cont'd)

- Methodology:
 - comScore's Ad Metrix data determines the top 20 display advertisers for the top 50 sites in each category, based on the number of display ad impressions delivered in January 2009
 - Advertising value is determined by the composition and online behavior of the audiences from these top sites who were exposed to the largest display campaigns; specifically
 - Trademark Searches related to advertisers' brands
 - Traffic driven to advertisers' sites
 - Ecommerce transactions related to the categories of the advertisers' brands
 - Household income is a proxy for audience value



Aggregate Results



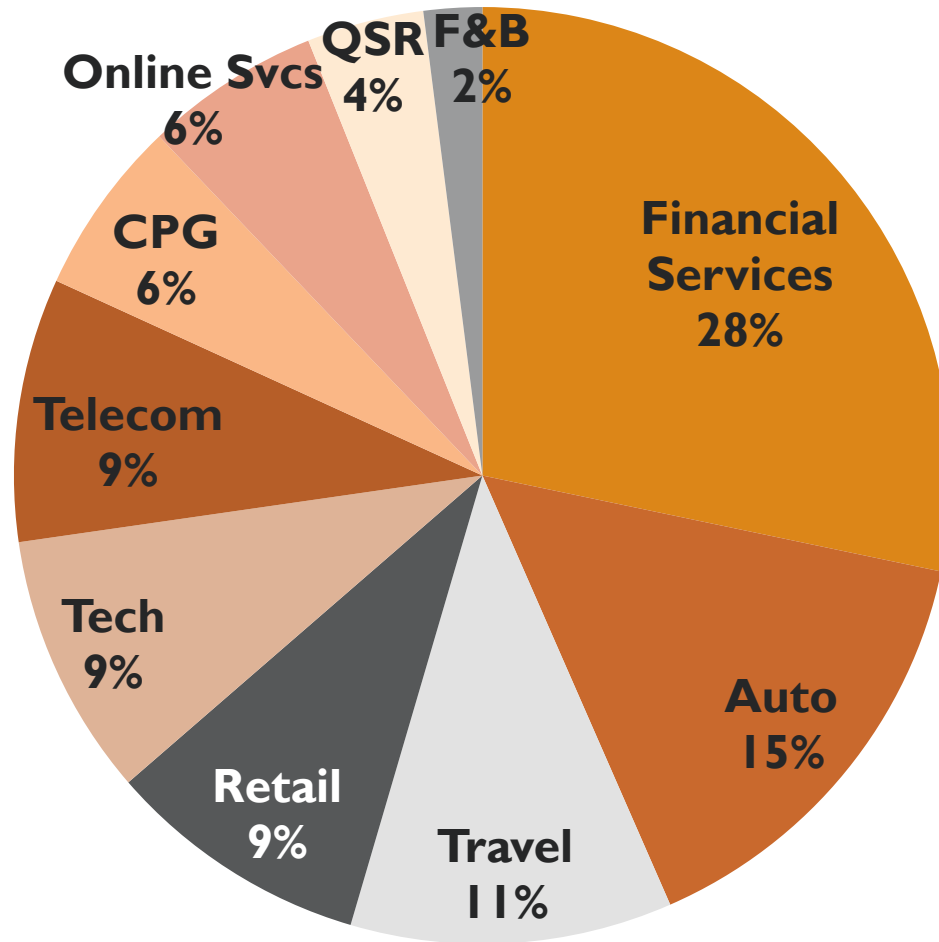


80 Ad Campaigns for 53 Brands Tracked Across 200 of the Most Trafficked Sites

- Allstate
- Alltel
- American Airlines
- American Express
- AT&T
- Audi
- Bank of America
- Brookstone
- Capital One
- Charles Schwab
- Coors
- Dell
- Disney Vacations
- Domino's Pizza
- Dunkin Donuts
- E*Trade
- Fidelity
- Ford
- Frontgate
- GMC
- H&R Block
- Hampton Inn
- Hewlett Packard
- Holiday Inn
- Honda
- Infiniti
- ING Group
- Intuit
- JCPenney
- Kia Motors
- The Ladders
- Microsoft
- Monster
- Nissan
- NutriSystem
- Oracle
- PNC Bank
- Progressive
- Scottrade
- Skymall
- Sprint Nextel
- Stop & Shop
- TD Bank
- Ticketmaster
- T-Mobile
- Toyota
- Travelocity
- TurboTax
- Vacations To Go
- Verizon
- Vicks
- Visa
- Weight Watchers

These 53 Brands by Industry

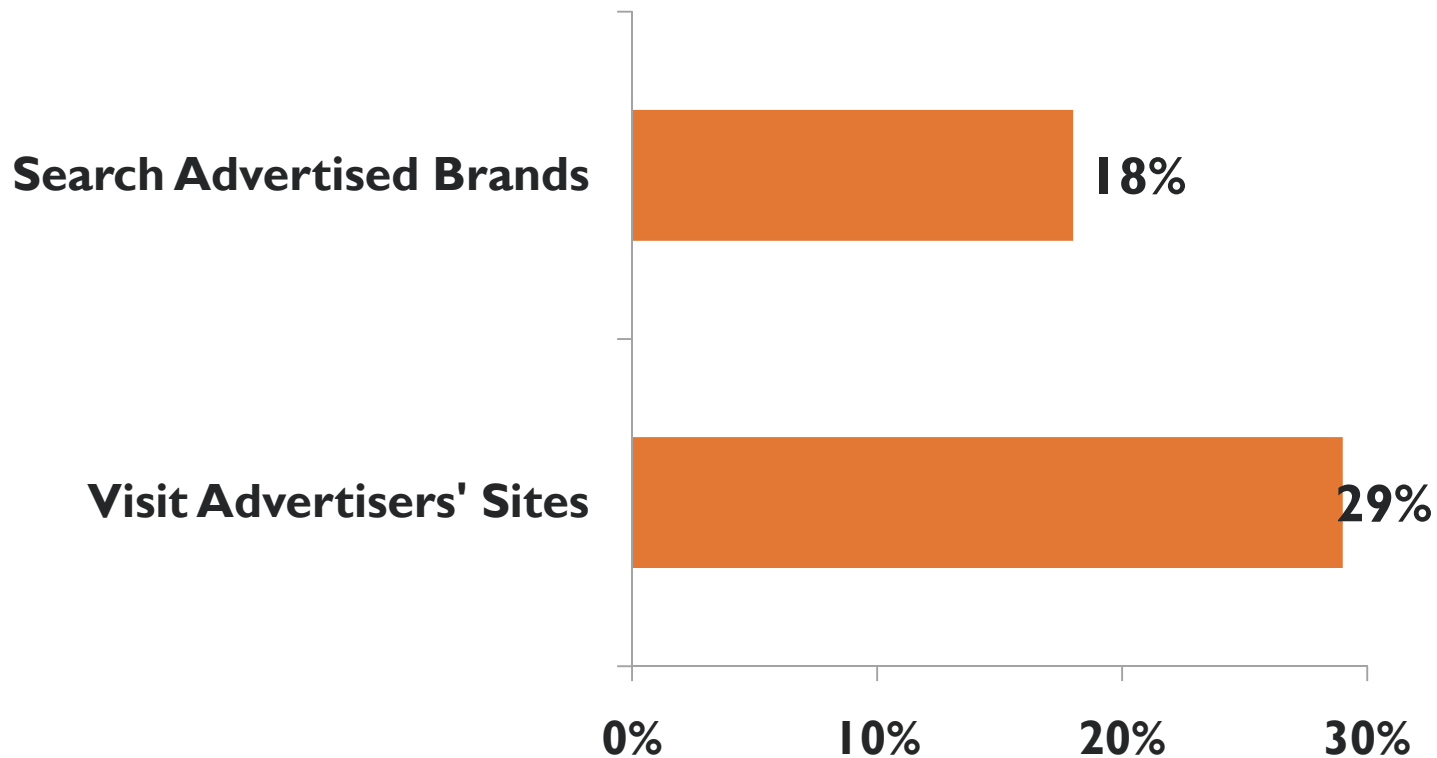
Brands by Industry



Exposure to Display Ads Correlates with Significant Consumer Activity

- About one in five consumers searched on the advertised brand
- Separately, about one-third visited the advertiser's site in February

UVs Exposed to Advertising

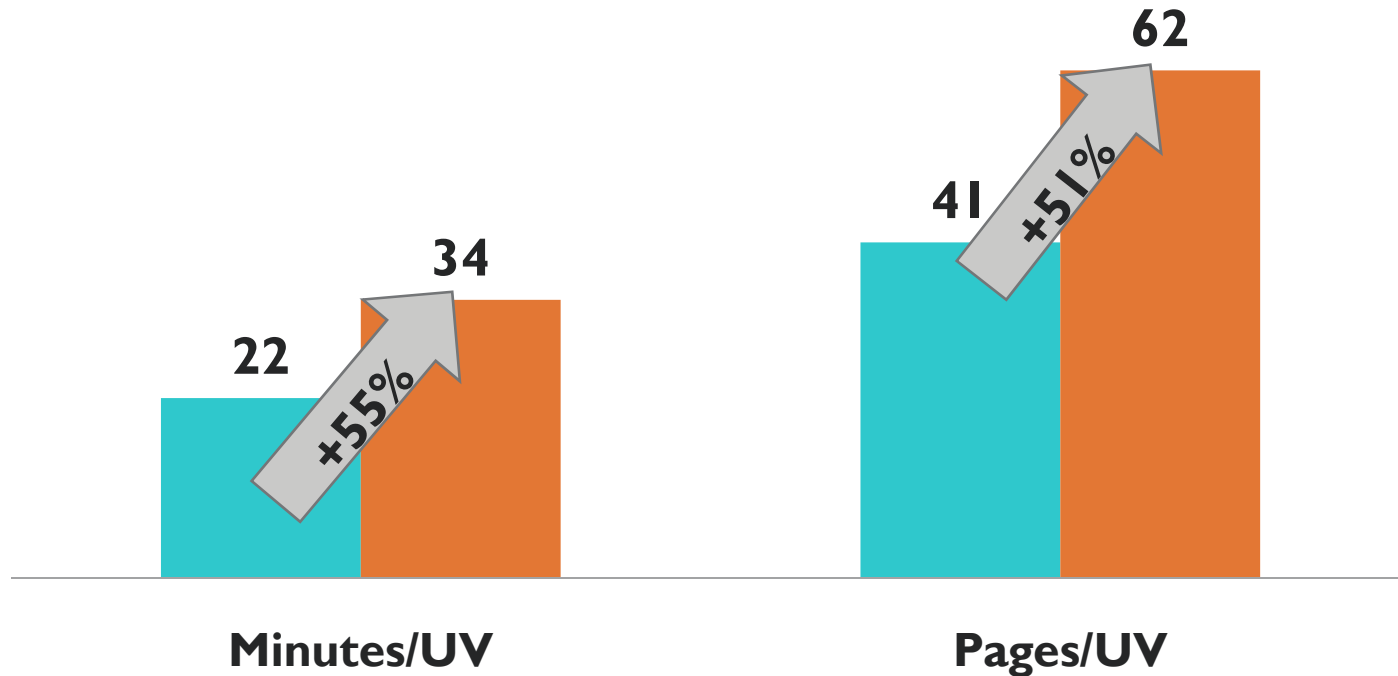


These Advertiser Site Visitors are More Engaged than the Sites' Usual Visitors

- Consumers exposed to the display advertising spent over 50% more time than the average visitors to these sites the next month
- This rise in time spent is matched by a similar increase in page views

Advertiser Site Engagement

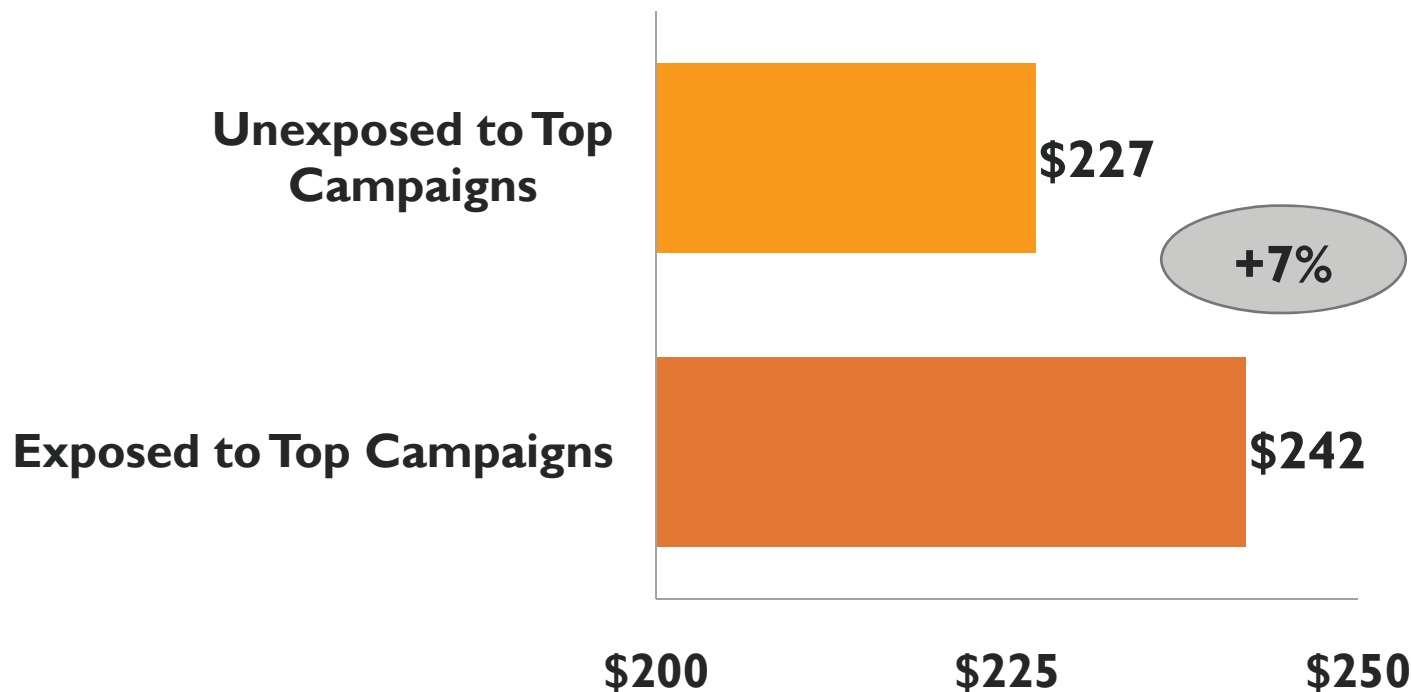
■ All UVs to Advertiser Sites ■ UVs Exposed to Advertising



Greater Spending for Advertiser Site Visitors Exposed to Biggest Campaigns

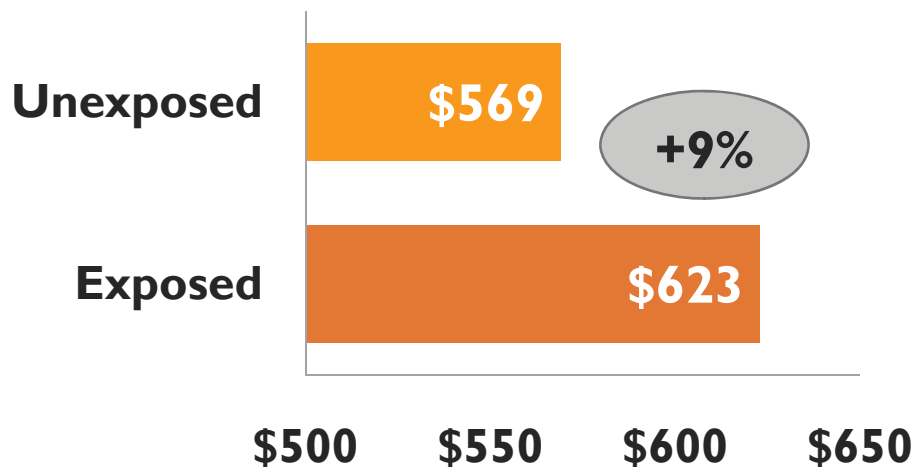
- These figures represent the average e-commerce spending in February for visitors to the 53 brands' sites – comparing visitors exposed to these brands' January online ad campaigns with those not exposed

E-commerce \$/Advertiser Site Visitor Feb '09

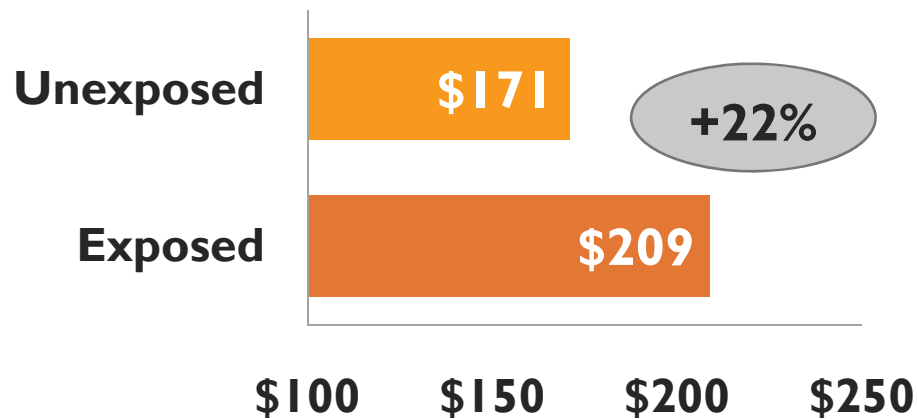


More E-Commerce Spending by Those Exposed to Related Online Advertising

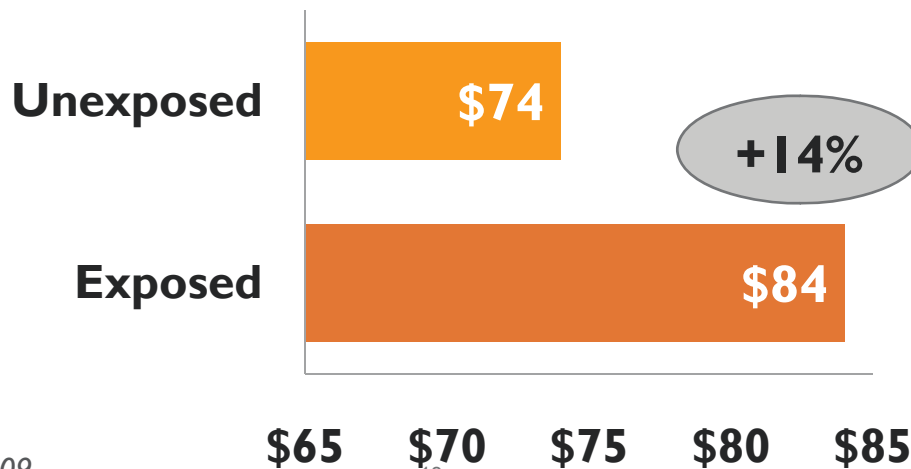
Travel \$/Advertiser Visitor Feb '09



Consumer Electronics \$/Advertiser Visitor Feb '09

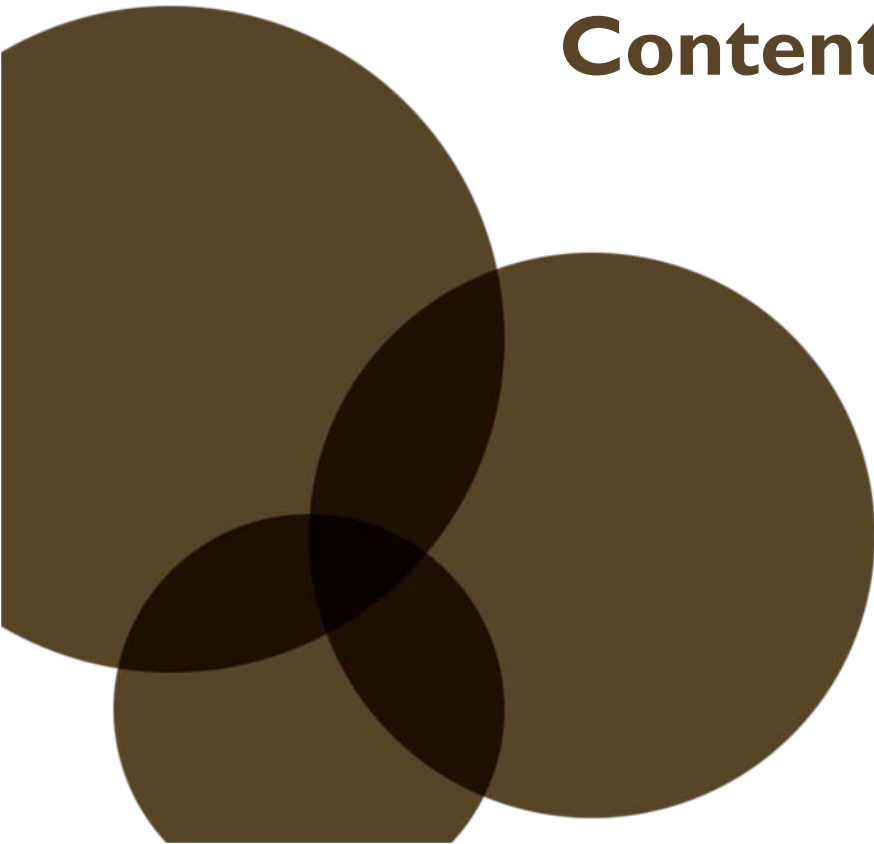


CPG \$/Advertiser Visitor Feb '09



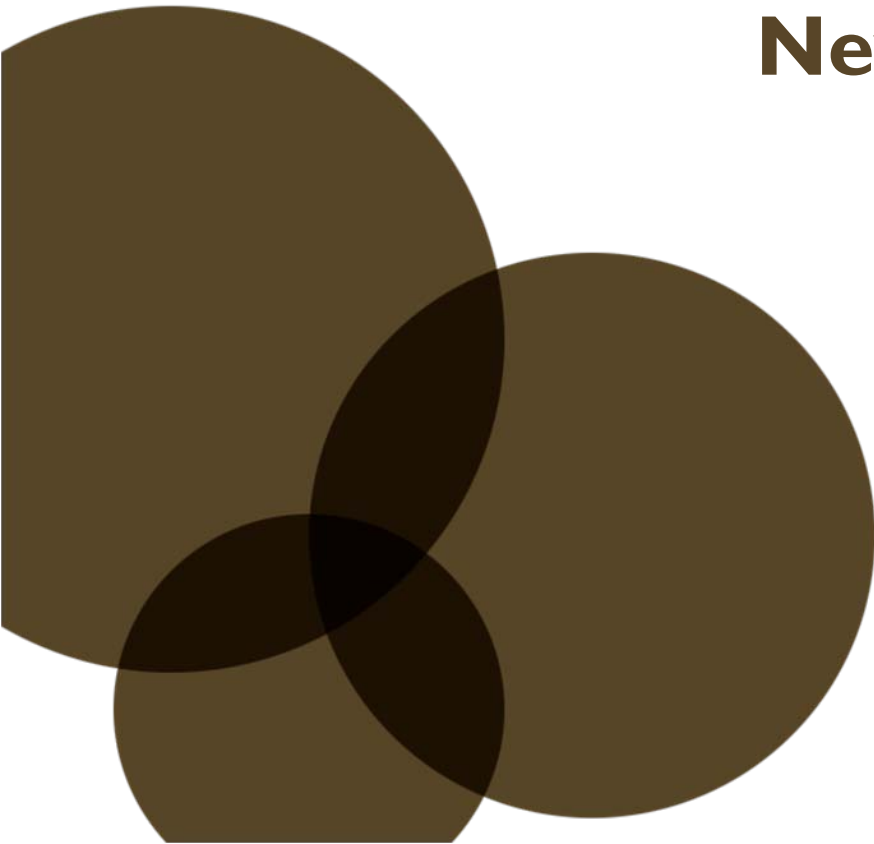


Content Site Segment Results



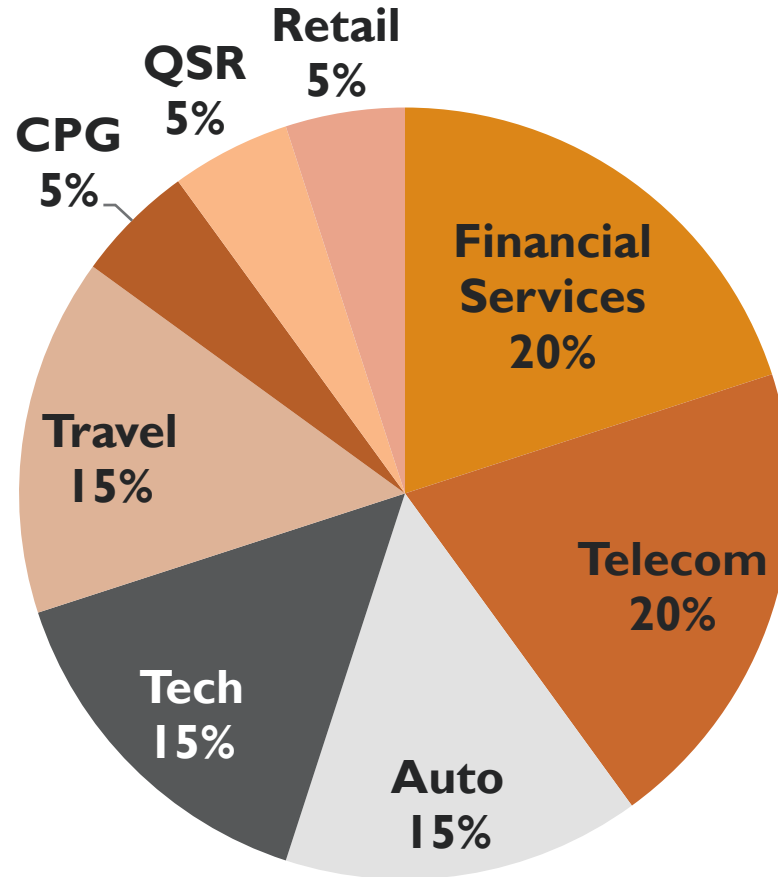


News & Information



Top 20 Advertiser Categories

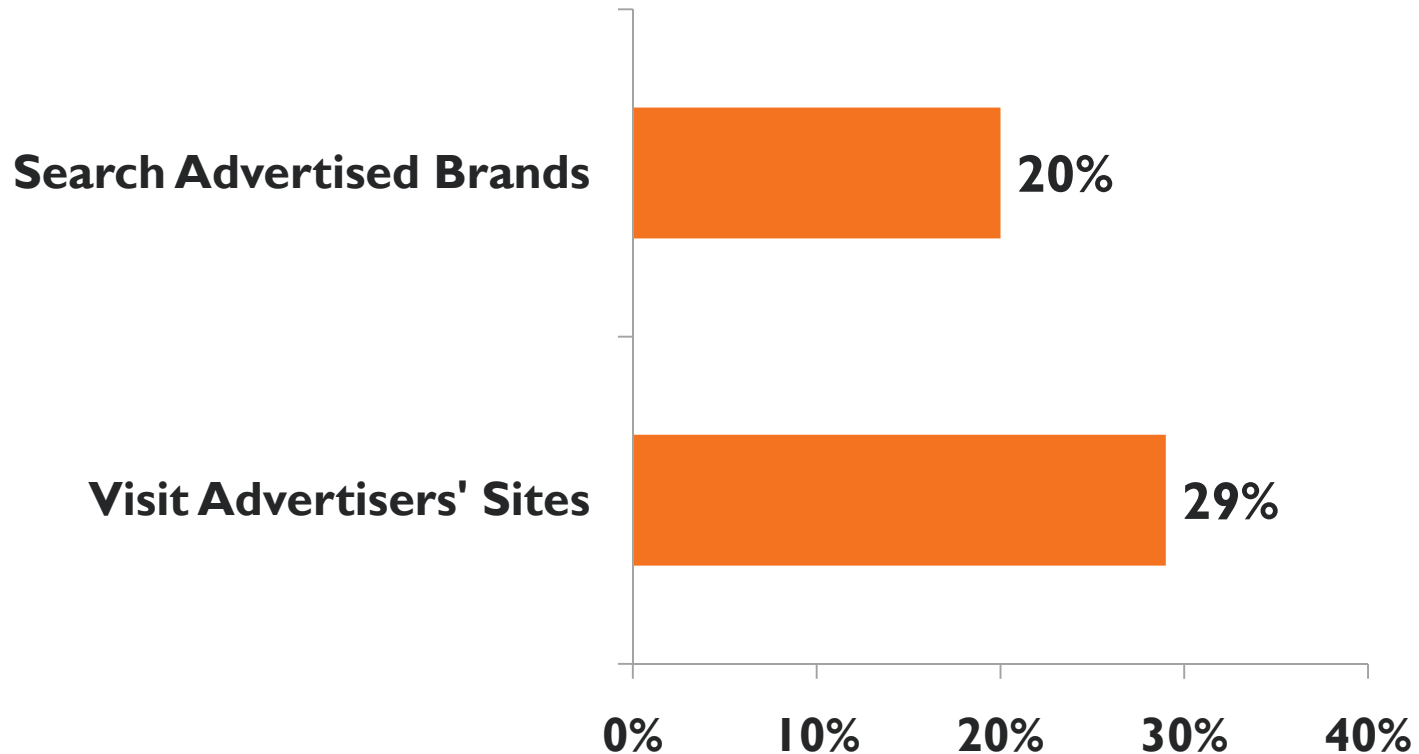
Top 20 Advertiser Categories: News & Info



Those Exposed to Advertising on Top 50 News Sites Act on These Brands

- One in five search advertised brands online
- One in three visit these advertisers' sites

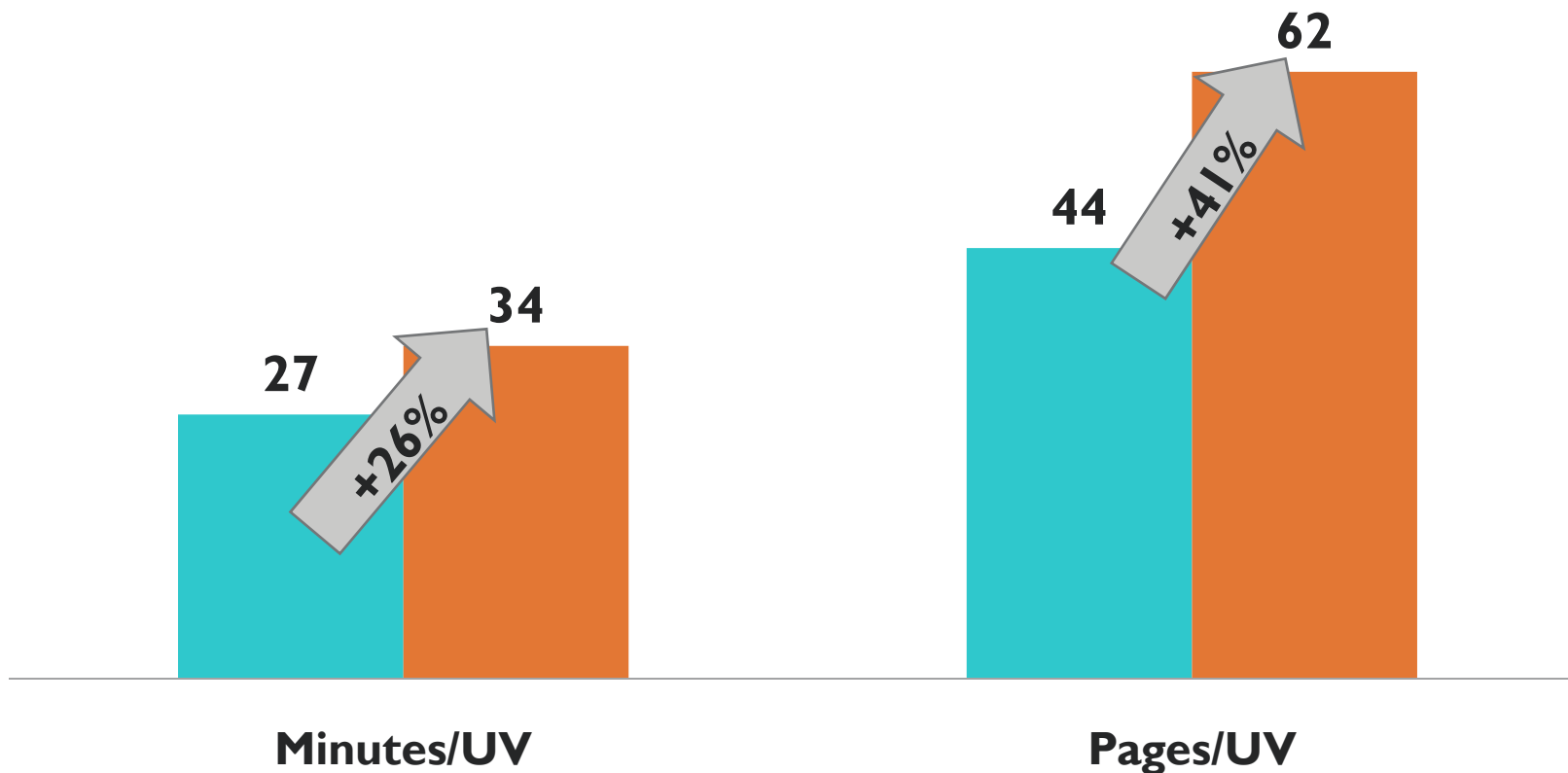
News UVs Exposed to Top 20 Advertising



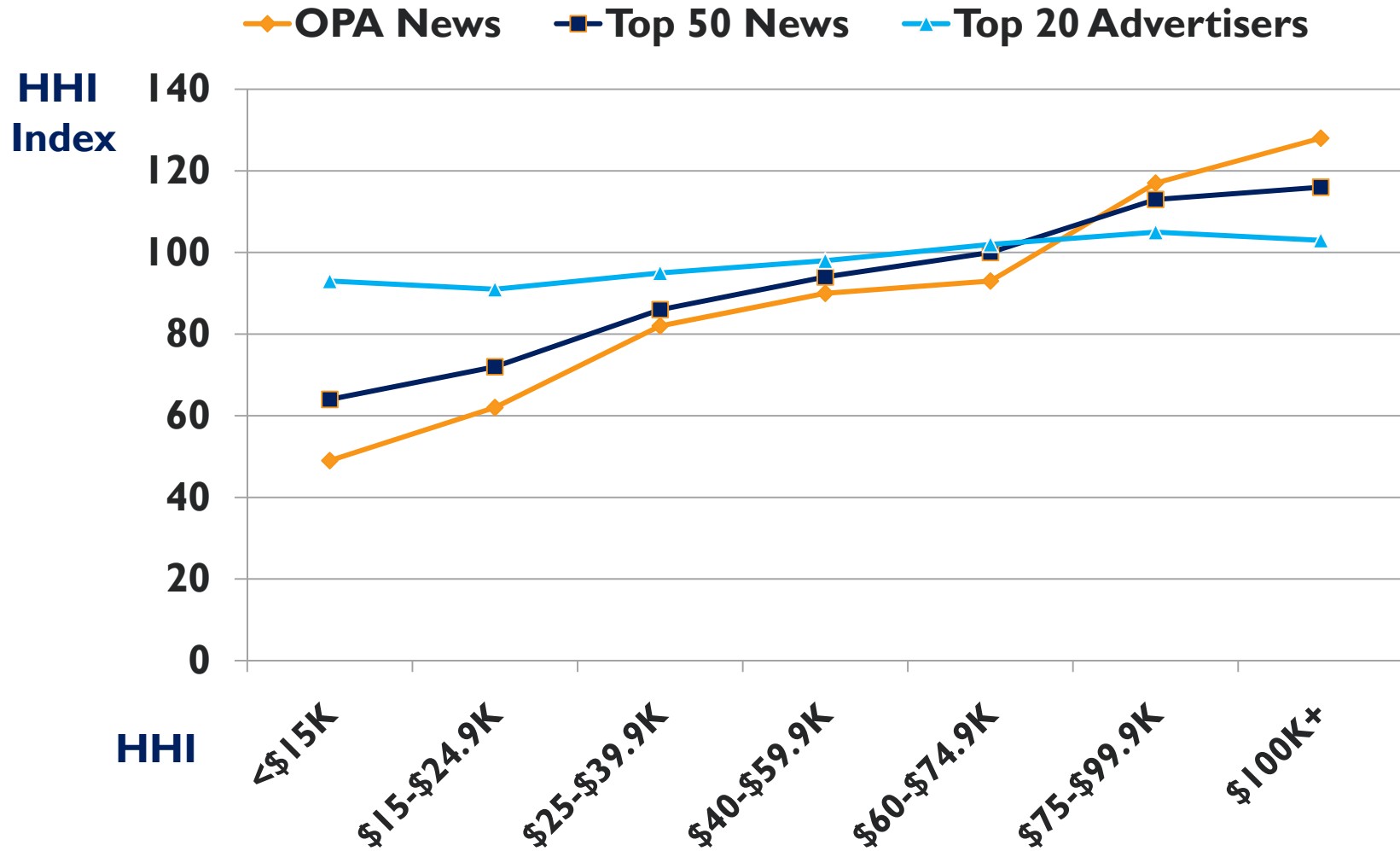
Exposed Visitors View 40% More Pages on Advertisers' Sites

Advertiser Site Engagement

■ All UVs to Advertiser Site ■ Exposed News Site UVs



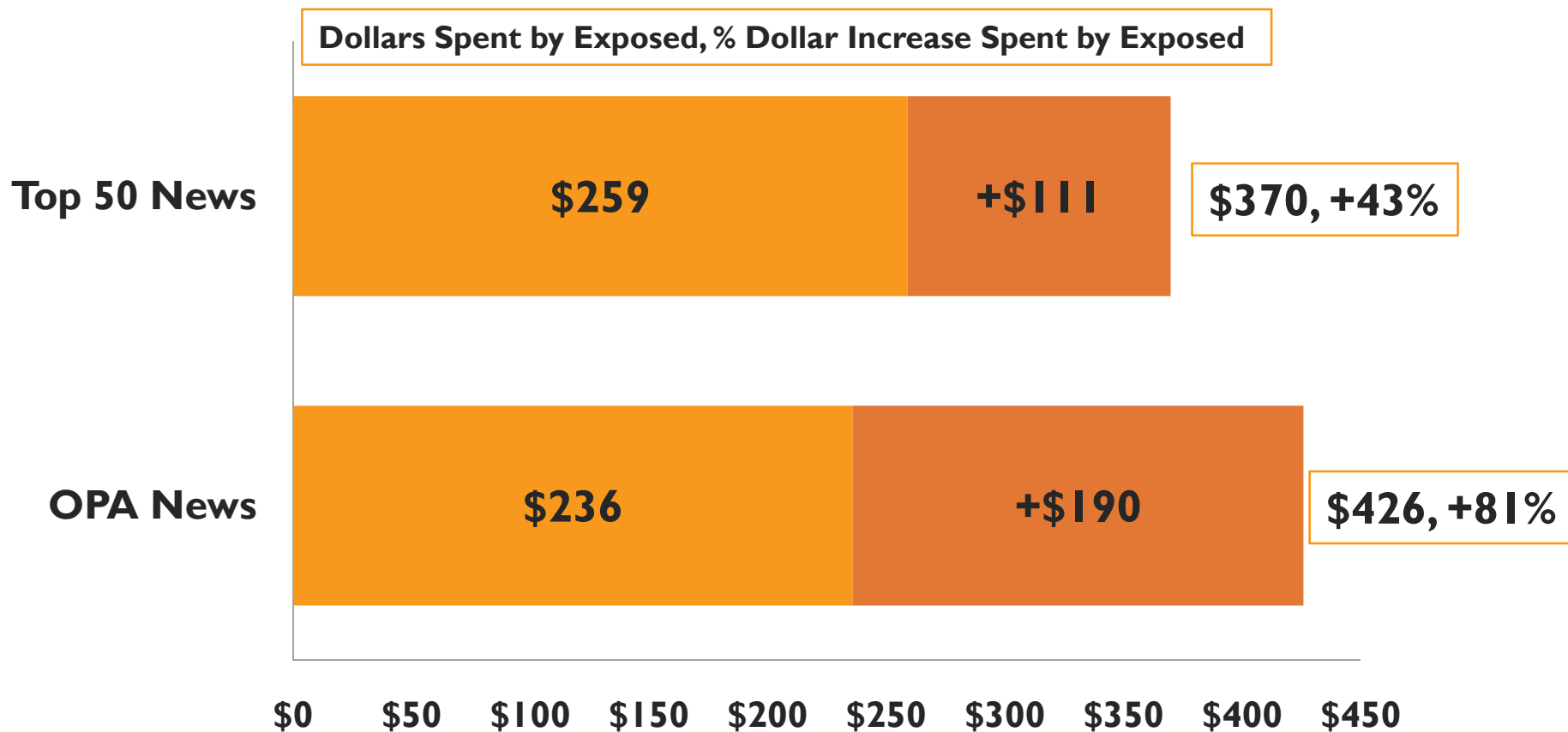
They are Higher Income – Especially from OPA Sites – Than Typical Visitors



Much More Spending by the Exposed – Especially Those from OPA News Sites

Ecommerce \$/News Site Visitor Feb '09

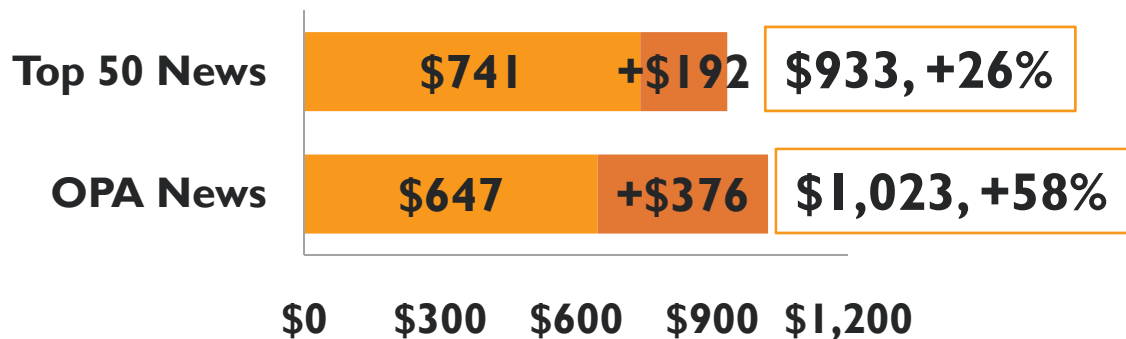
■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



Travel and CPG Brands Benefit from These Higher Income News Audiences

Travel \$/News Site Visitor Feb '09

- Dollars Spent by Unexposed
- Additional Dollars by Exposed



Dollars Spent by Exposed, % Dollar Increase Spent by Exposed

- This is especially true for those seeing the applicable ads on OPA member sites
- The additional travel dollars spent by those exposed on OPA news sites was about double that of the top 50
- Additional CPG dollars spent by those exposed on OPA news sites was almost triple that of those exposed on the rest of the top 50

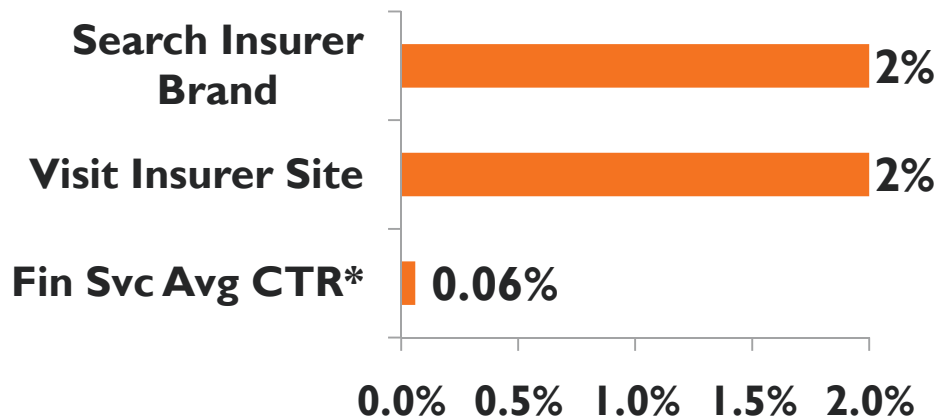
CPG \$/News Site Visitor Feb '09



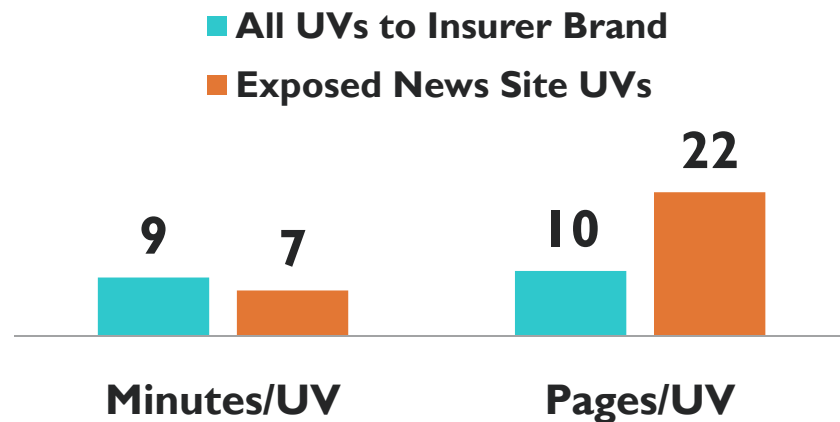
Results for an Insurance Company

- Among those exposed to advertising on News sites, this leading insurer saw more than double its typical page views
- Search and Visitation rates among those exposed were much higher than the Financial Services' industry-wide CTR average, which was the lowest among the 11 industries tracked

News UVs Exposed to Insurer Advertising



Engagement with Insurer Brand Feb '09



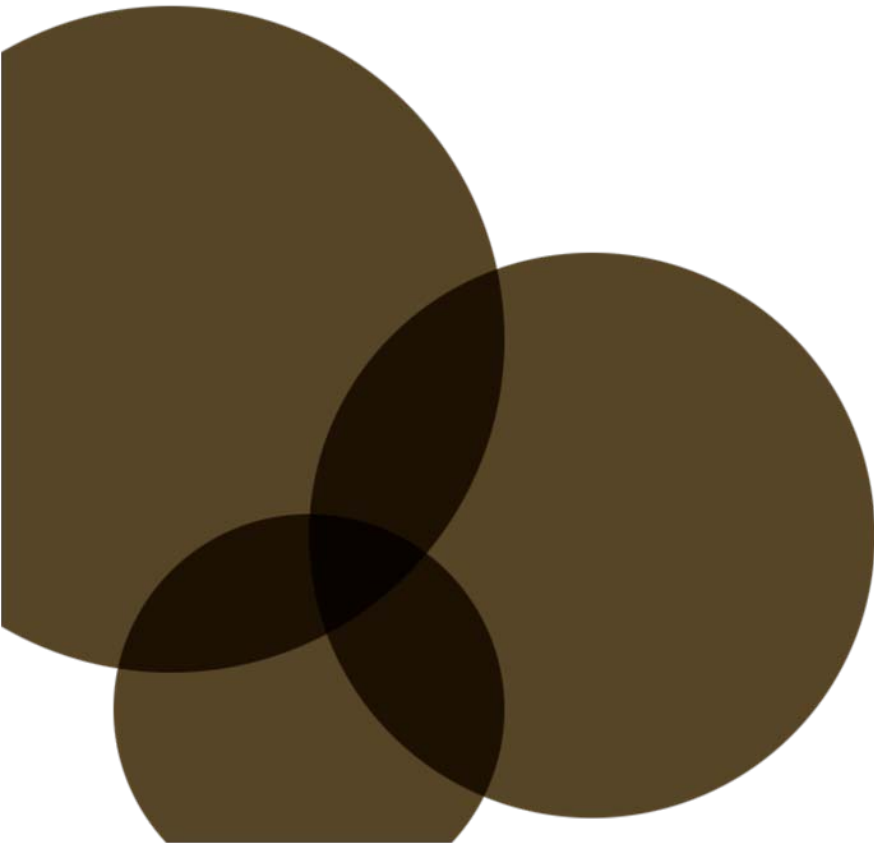
Sources: Search & Visits comScore Marketing Solutions 02/09

All UVs comScore MediaMetrix, 02/09; Exposed UVs comScore Marketing Solutions, 02/09

*CTR Source: DoubleClick DART for Advertisers January – July 2008

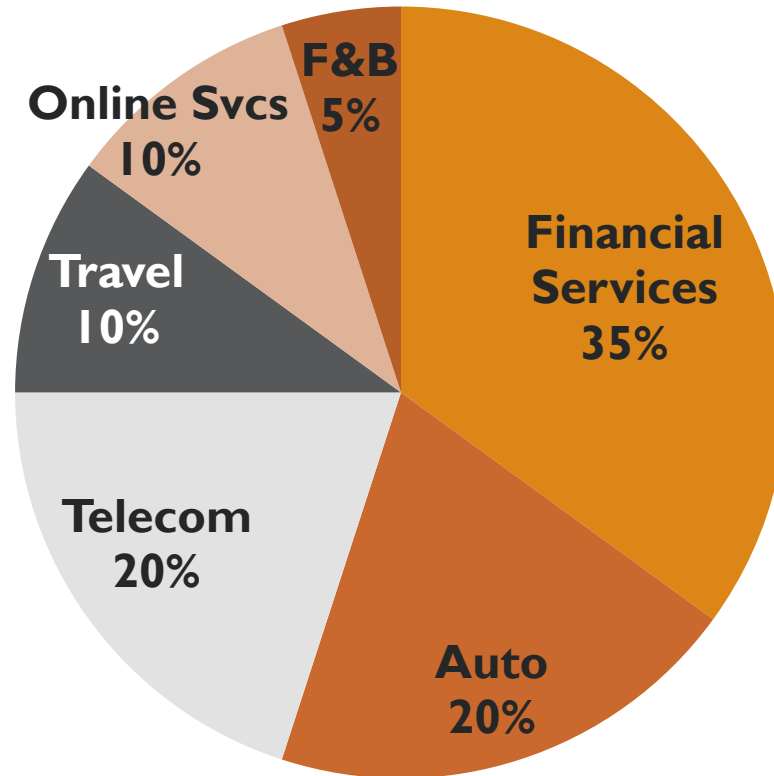


Sports



Top 20 Advertiser Categories

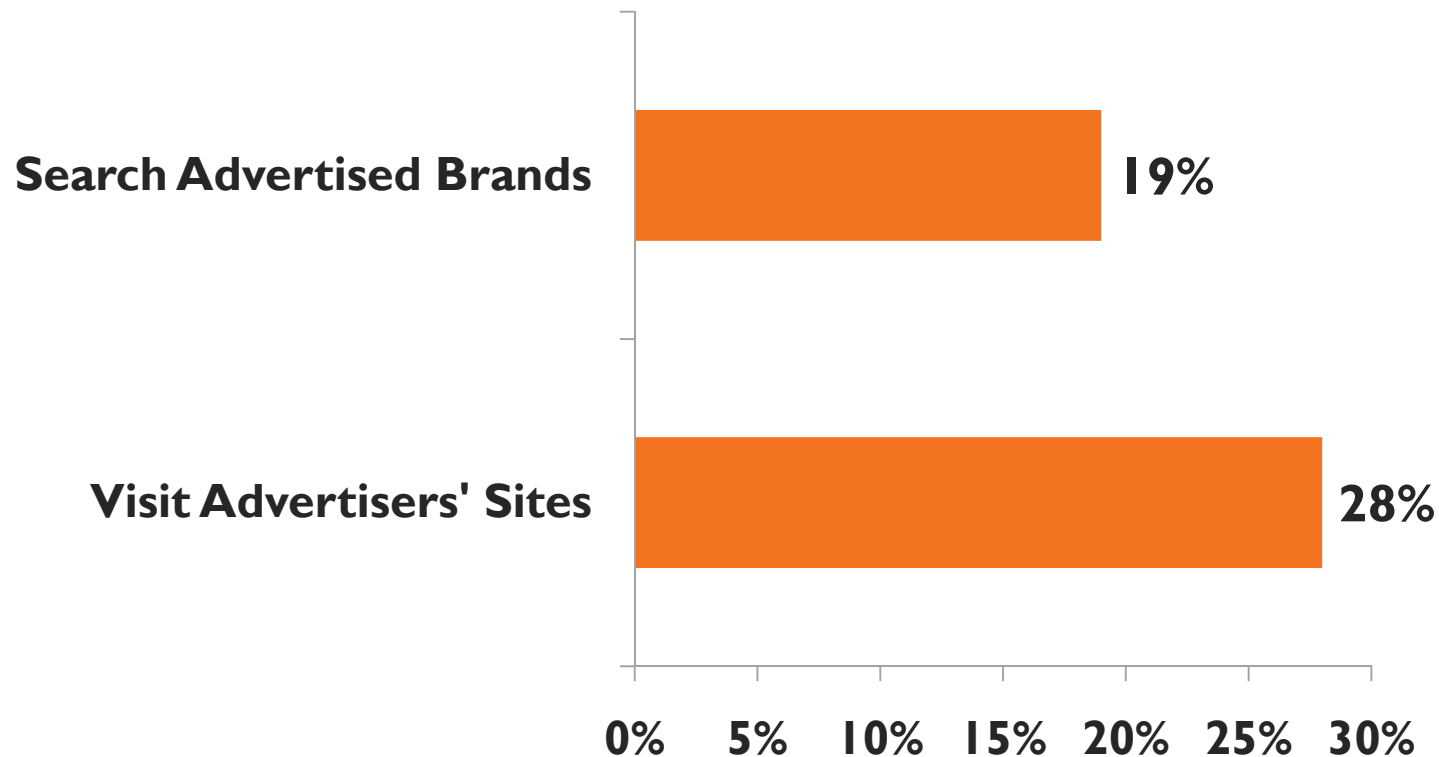
Top 20 Advertiser Categories: Sports



Among Those Exposed to Advertising on Sports Sites...

- One in five consumers searched on the advertised brand
- Over one in four visit the advertisers' sites

Sports UVs Exposed to Top 20 Advertising

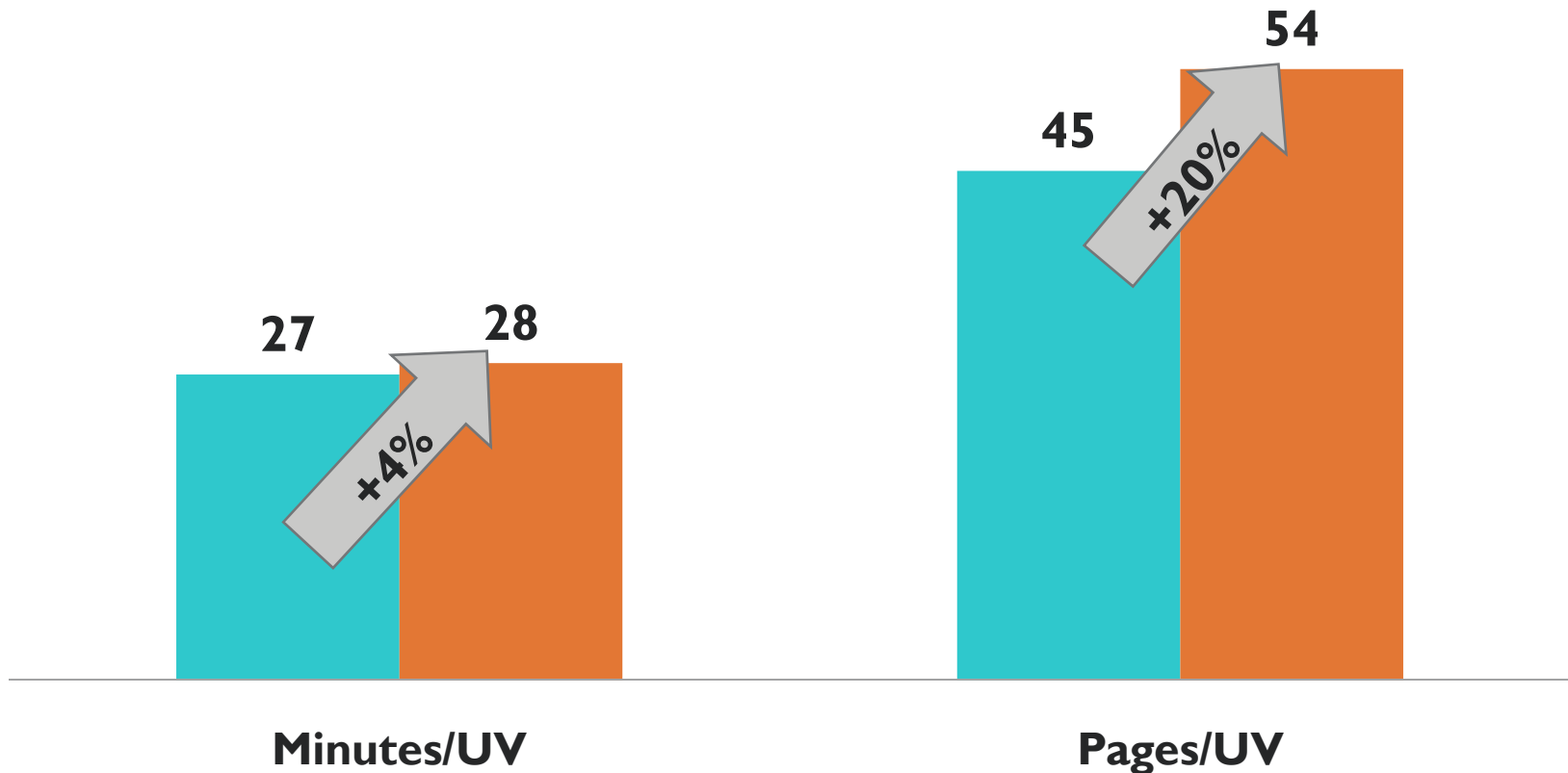


Base: 37.6MM Exposed to at least one of top 20 advertisers
Source: comScore Marketing Solutions, 02/09

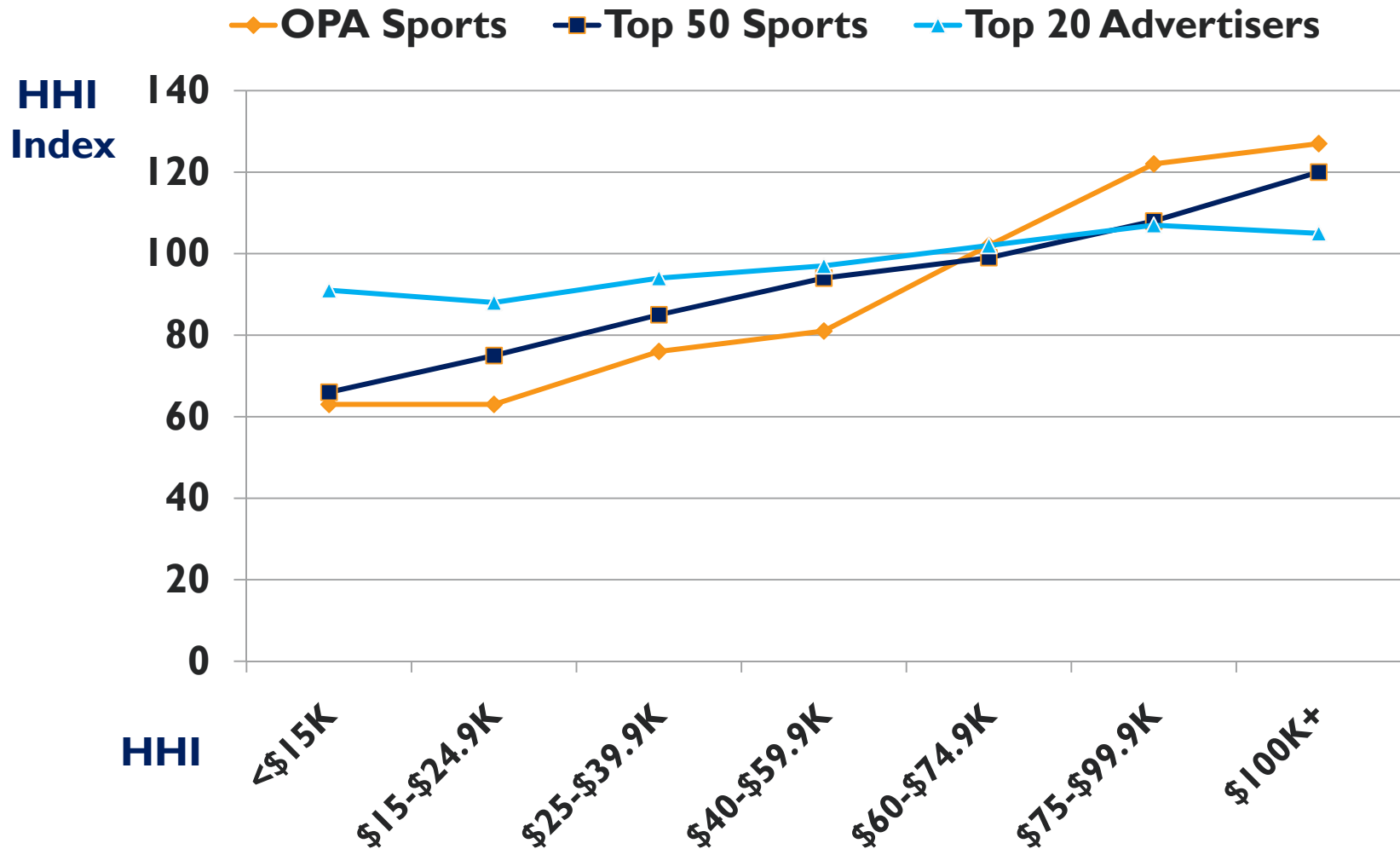
Ad-Exposed UVs View 20% More Pages of Advertisers' Content

Advertiser Site Engagement

■ All UVs to Advertiser Site ■ Exposed Sports Site UVs



OPA and Top 50 Sports Sites Drove High Income Audiences to Advertisers



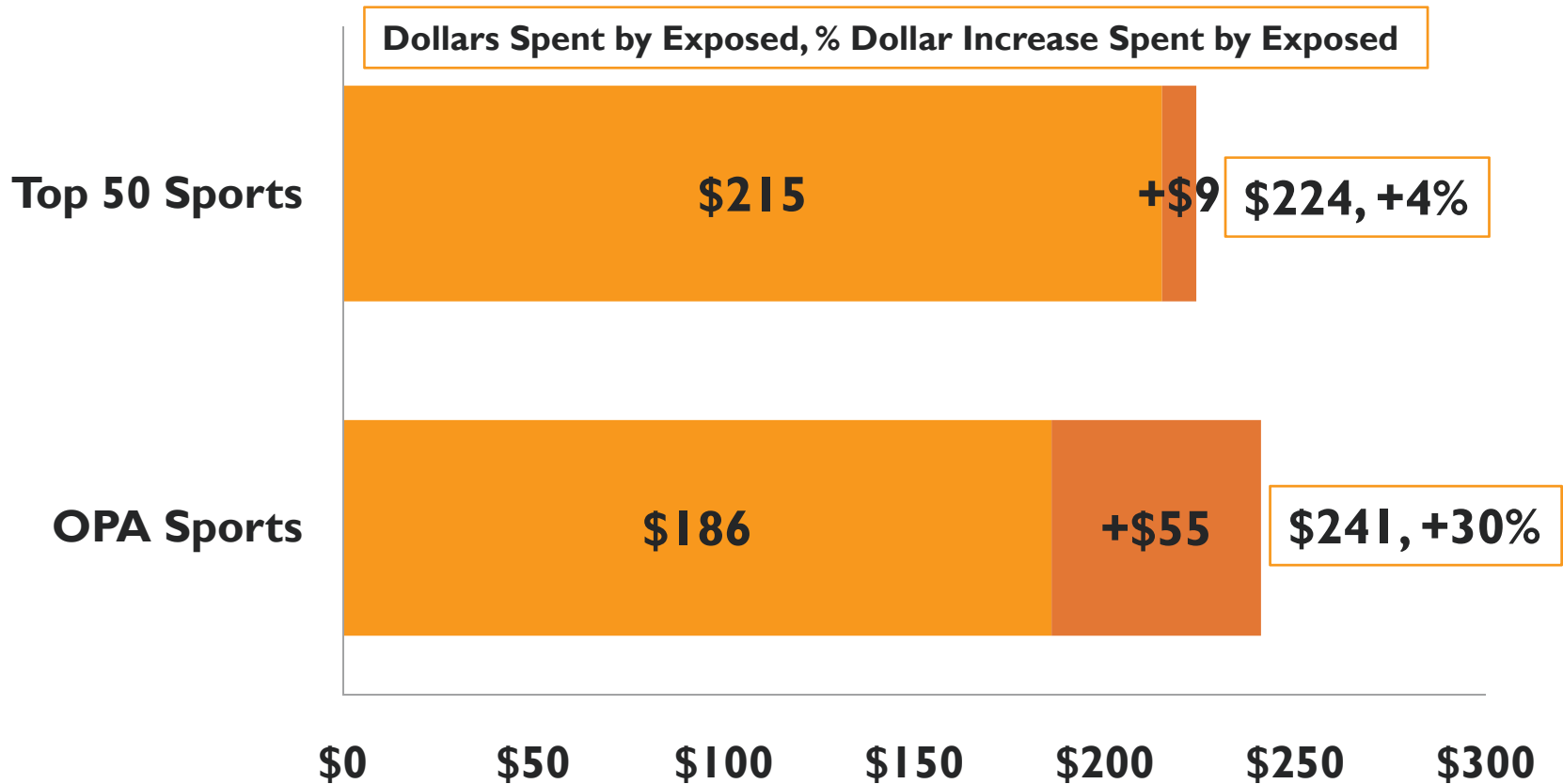
OPA Base: 14.2MM; Top 50 Base 37.6MM
 Source: comScore Marketing Solutions 02/09



Significantly Greater Spending by UVs Exposed to Ads on OPA Sports Sites

Ecommerce \$/Sports Site Visitor Feb '09

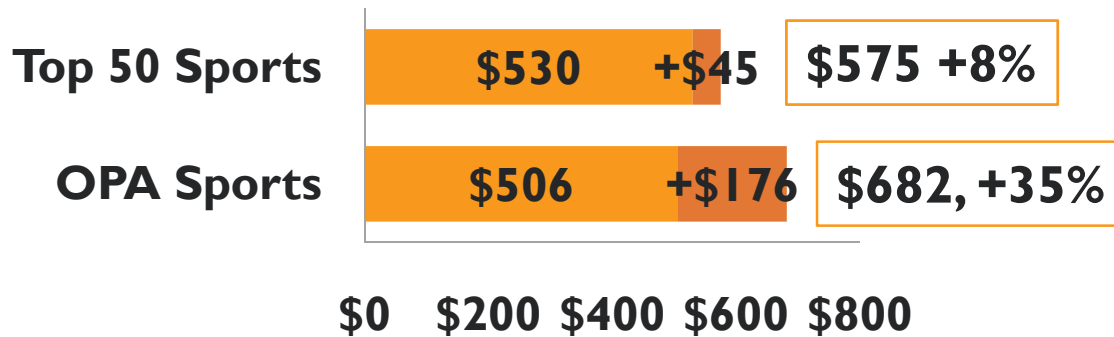
■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



Travel and Telecom Benefit – Especially From OPA Sports Sites

Travel \$/Sports Site Visitor Feb '09

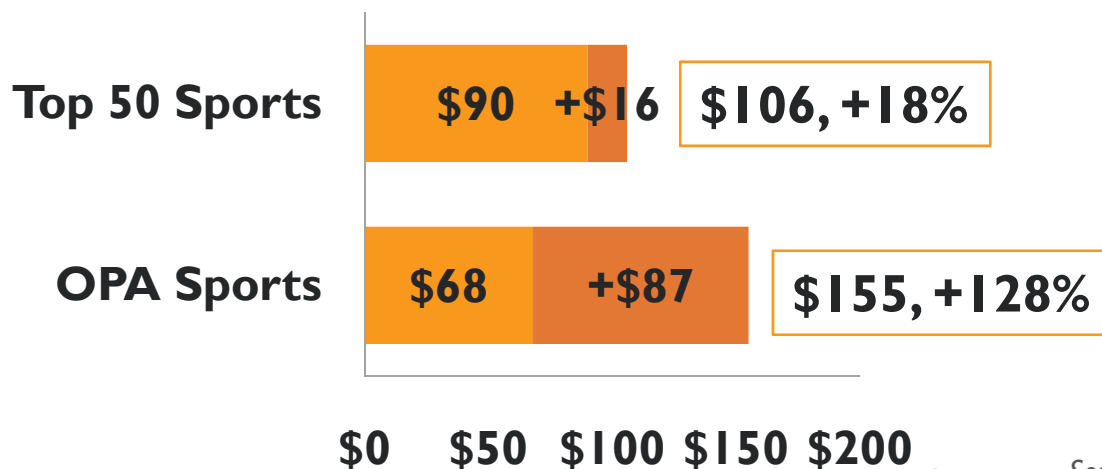
- Dollars Spent by Unexposed
- Additional Dollars Spent by Exposed



Dollars Spent by Exposed, % Dollar Increase Spent by Exposed

- Travel dollars spent by those exposed on OPA sports sites was quadruple that of the top 50 sports sites
- Additional telecom dollars spent by those exposed on sports sites was over 5X that of those exposed on the rest of the top 50

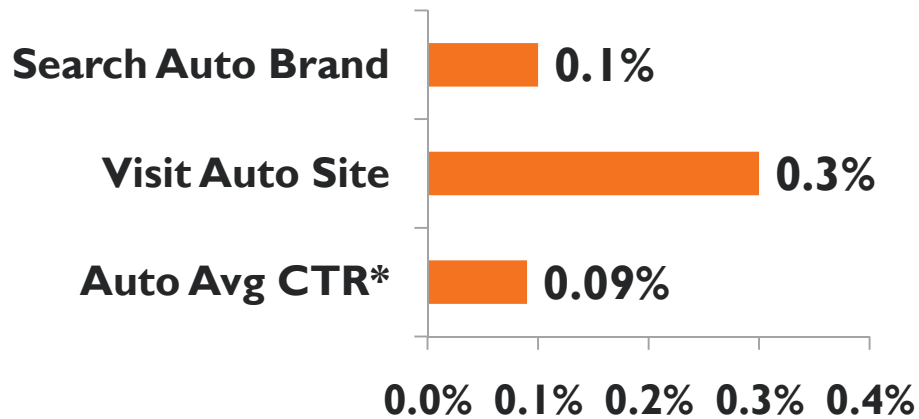
Telecom \$/Sports Site Visitor Feb '09



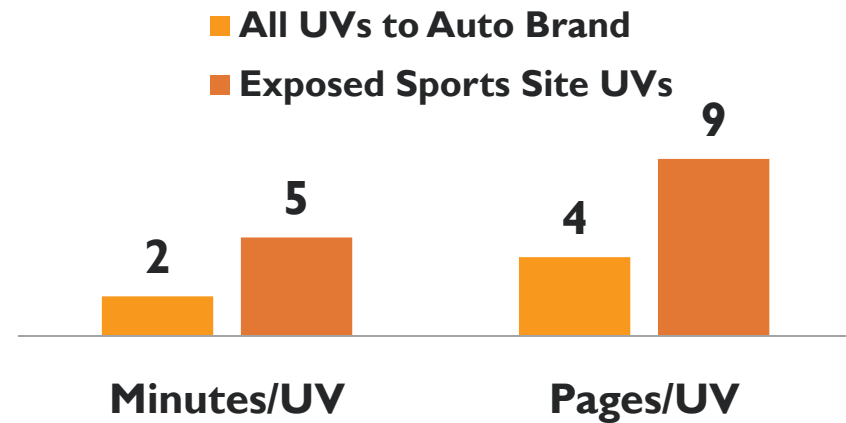
Results for an Automaker

- Among those exposed to advertising on Sports sites, this automaker obtained a more engaged audience
 - As comparison, we provide Auto's industry-wide CTR average

Sports UVs Exposed to Auto Advertising

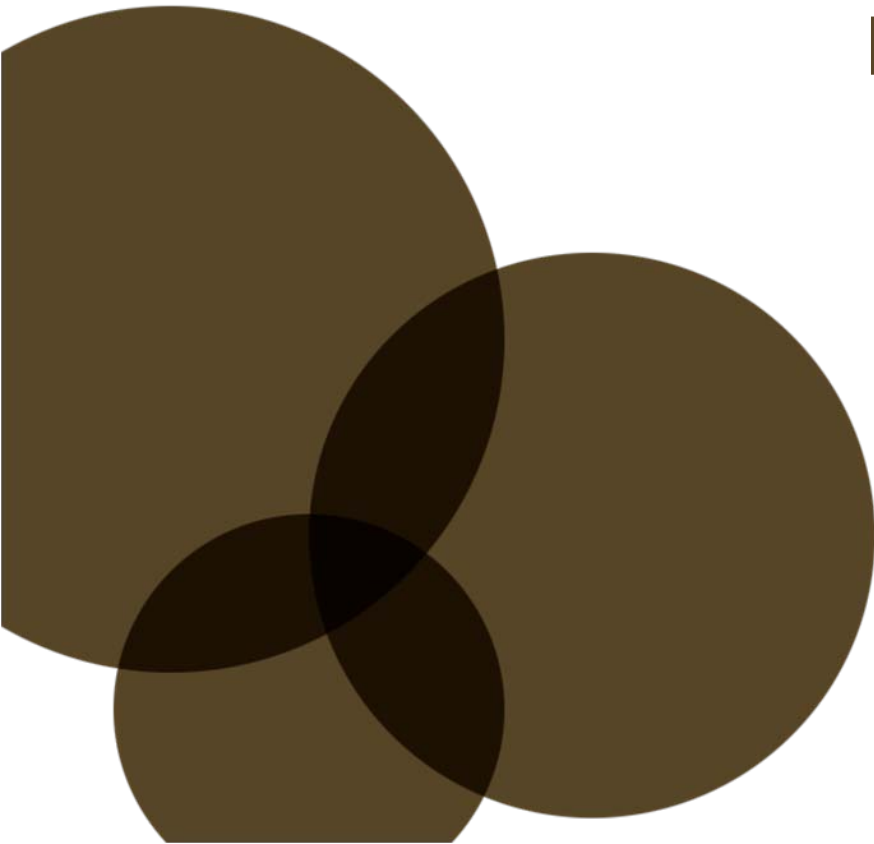


Engagement with Auto Brand Feb '09



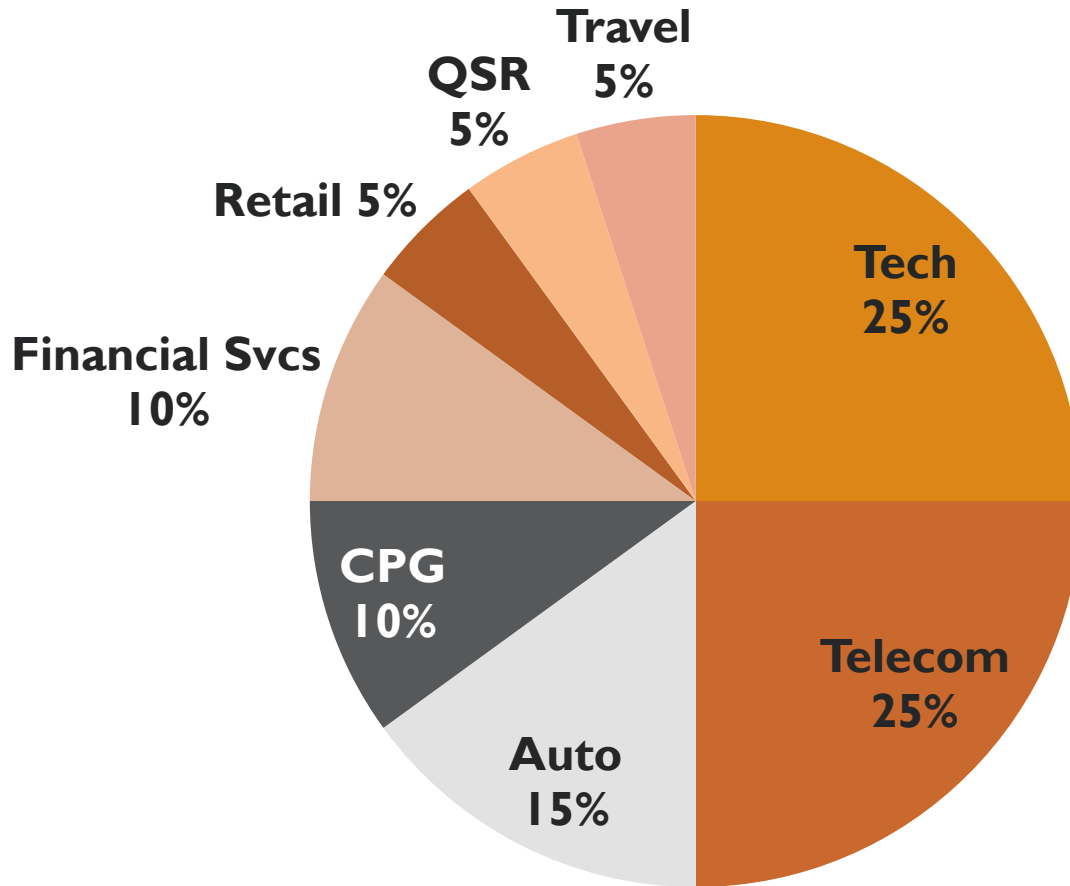


Entertainment



Top 20 Advertiser Categories

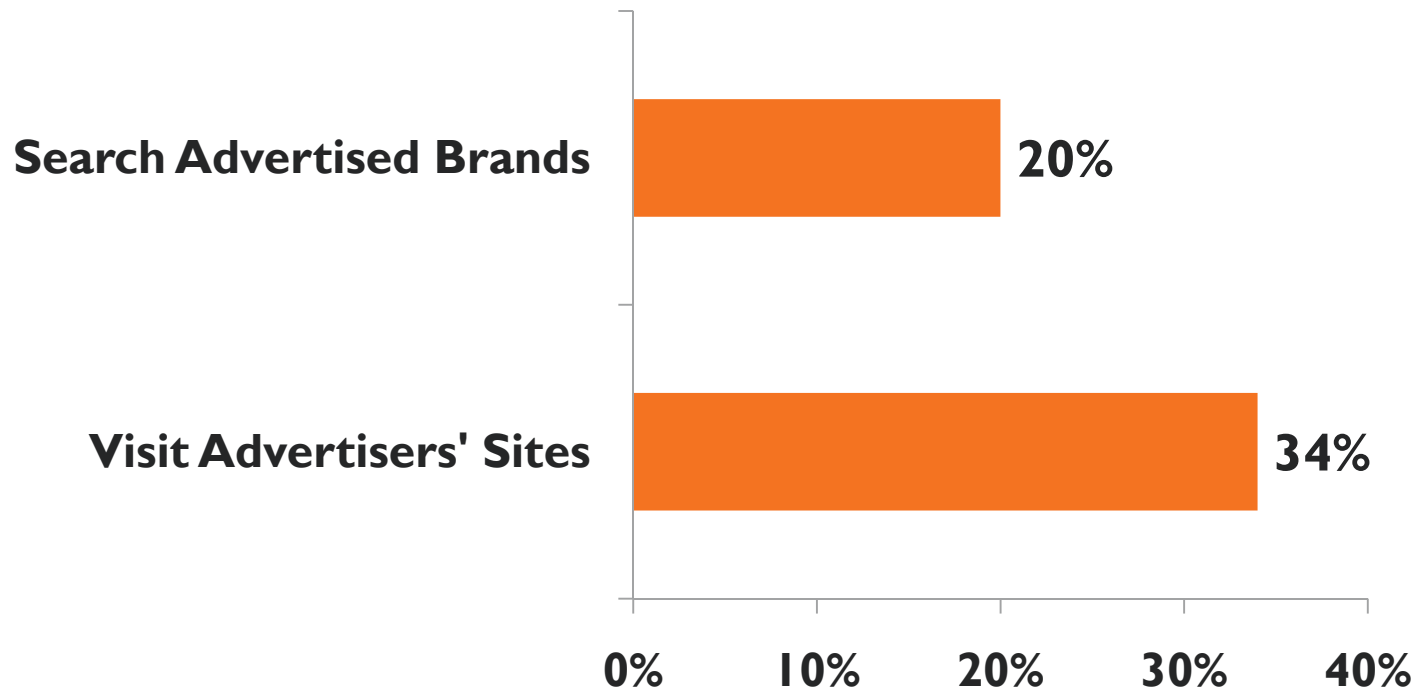
Top 20 Advertiser Categories: Entertainment



Entertainment Site Visitors Exposed to Ads Engage With Advertisers' Brands

- One in five consumers searched on advertised brands
- Separately, one-third visited the advertiser's site in February

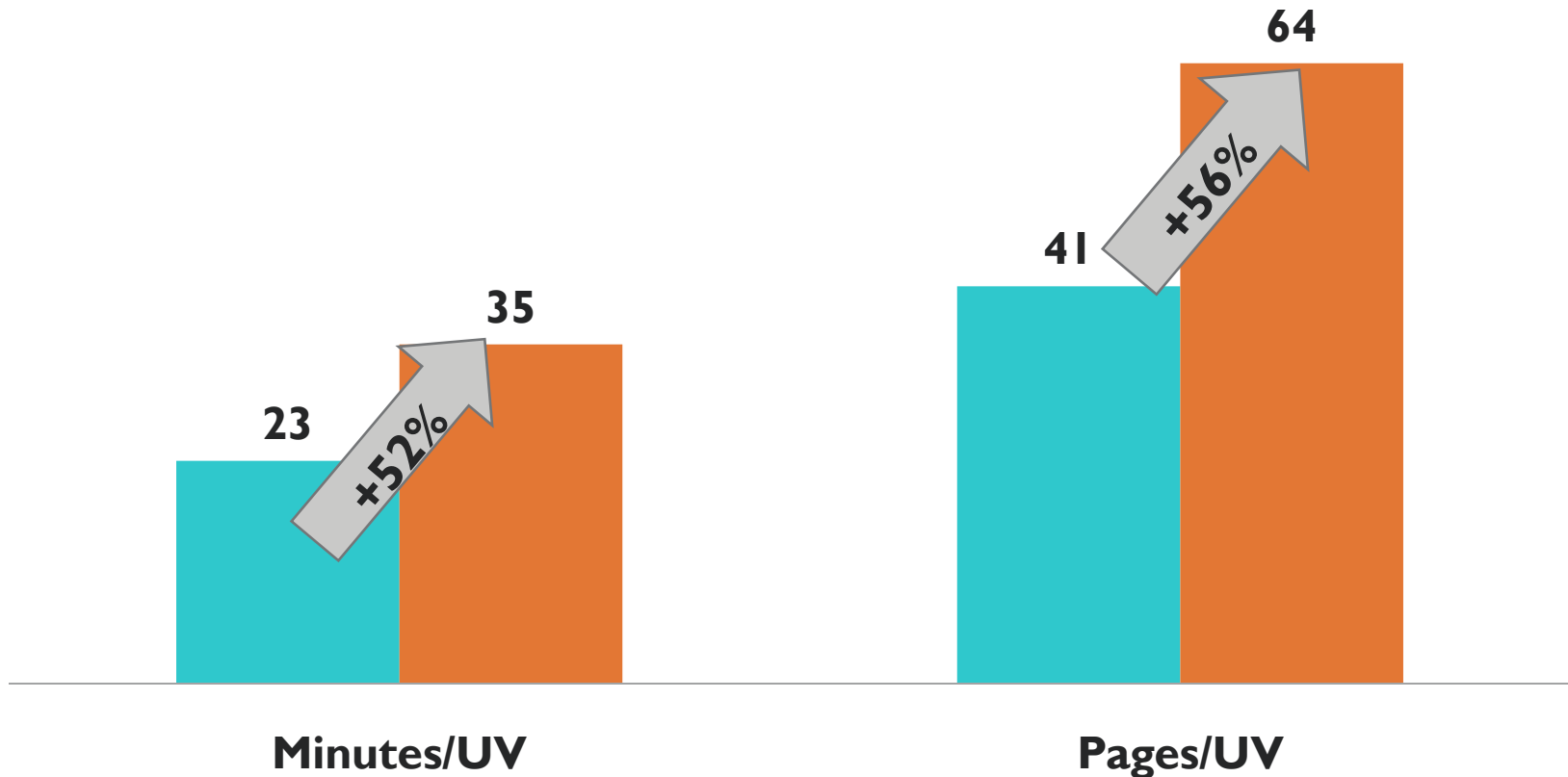
Entertainment UVs Exposed to Top 20 Advertising



Visitors Exposed to Ads Spend About 50% More Time with Advertisers' Sites

Advertiser Site Engagement

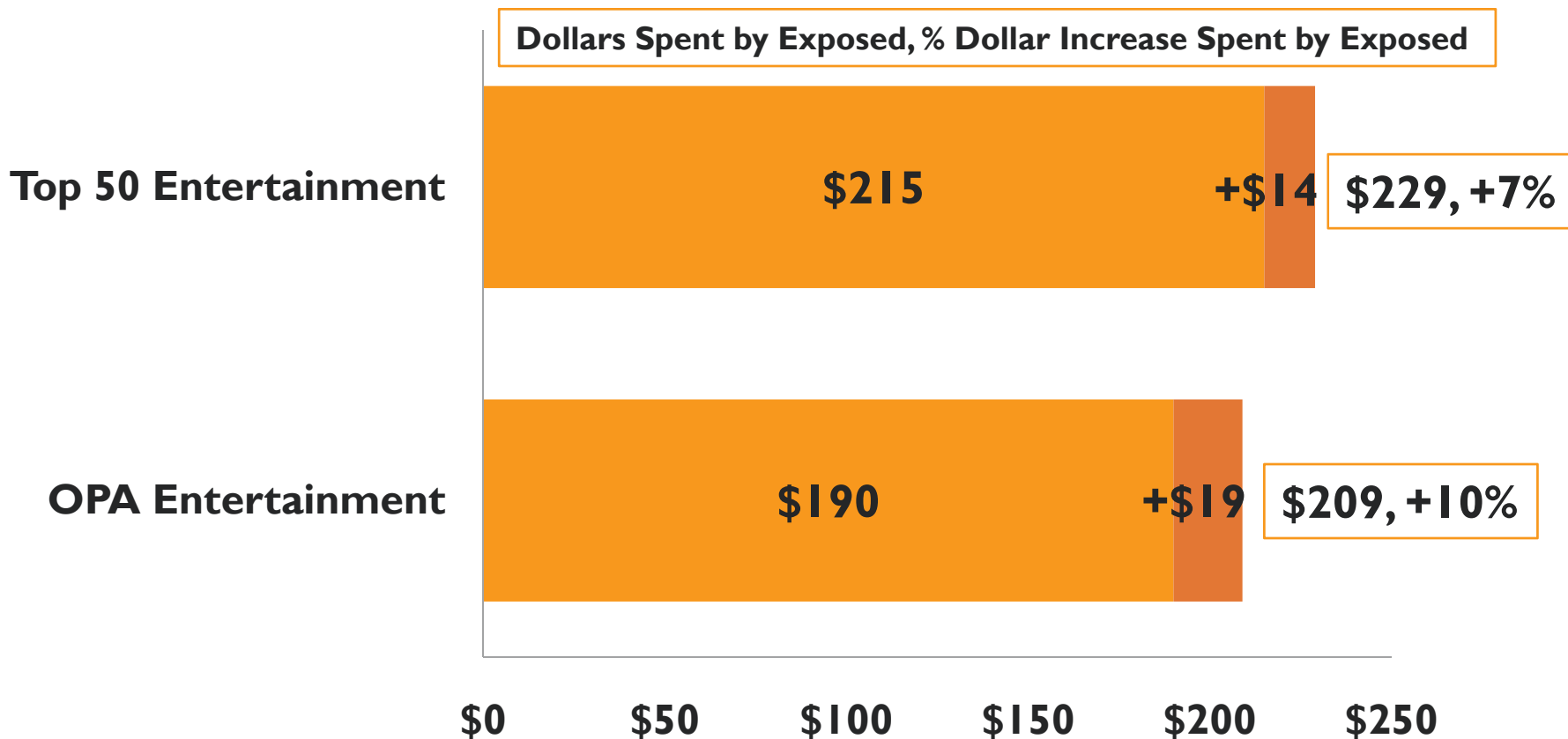
■ All UVs to Advertiser Site ■ Exposed Entertainment Site UVs



More Ecommerce Spending by Those Viewing Ads on Entertainment Sites

Ecommerce \$/Entertainment Site Visitor Feb '09

■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



Greater CPG and Telecom Spending by Those Exposed to Ads on OPA Entertainment Sites

CPG \$/Entertainment Site Visitor Feb '09

- Dollars Spent by Unexposed
- Additional Dollars Spent by Exposed



Dollars Spent by Exposed,
% Dollar Increase Spent by Exposed

- More CPG spending by those exposed to advertising on OPA Entertainment sites compared to top 50 Entertainment sites
- More Telecom spending by those exposed to ads on OPA Entertainment sites – in contrast to the results for other Entertainment sites

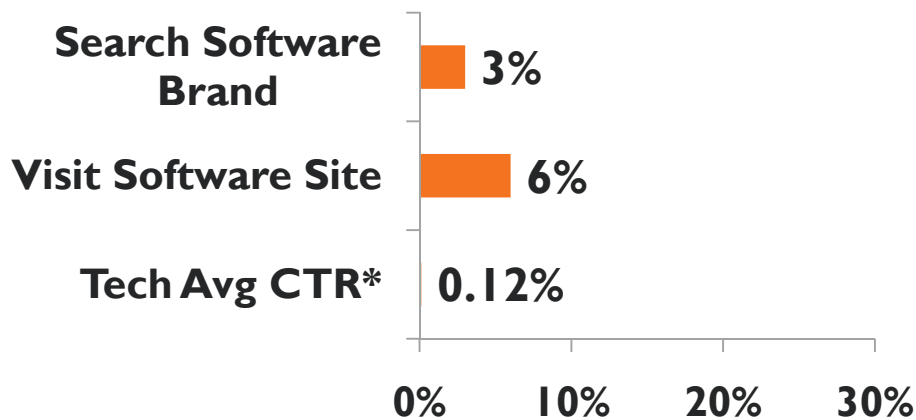
Telecom \$/Entertainment Site Visitor Feb '09



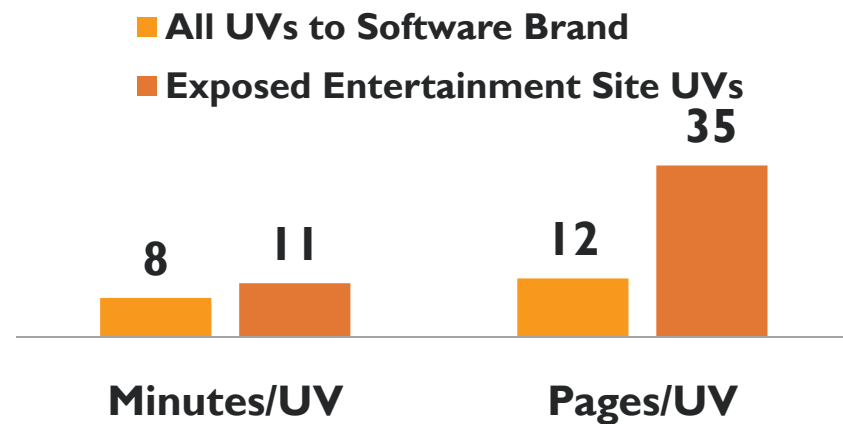
Results for a Software Company

- This software company had more engaged audiences among those exposed to advertising on Entertainment sites
- Software company also had higher search and visitation rates among those exposed to advertising compared to average CTR rates for Technology ads

Entertainment UVs Exposed to Software Advertising



Engagement with Software Brand Feb '09



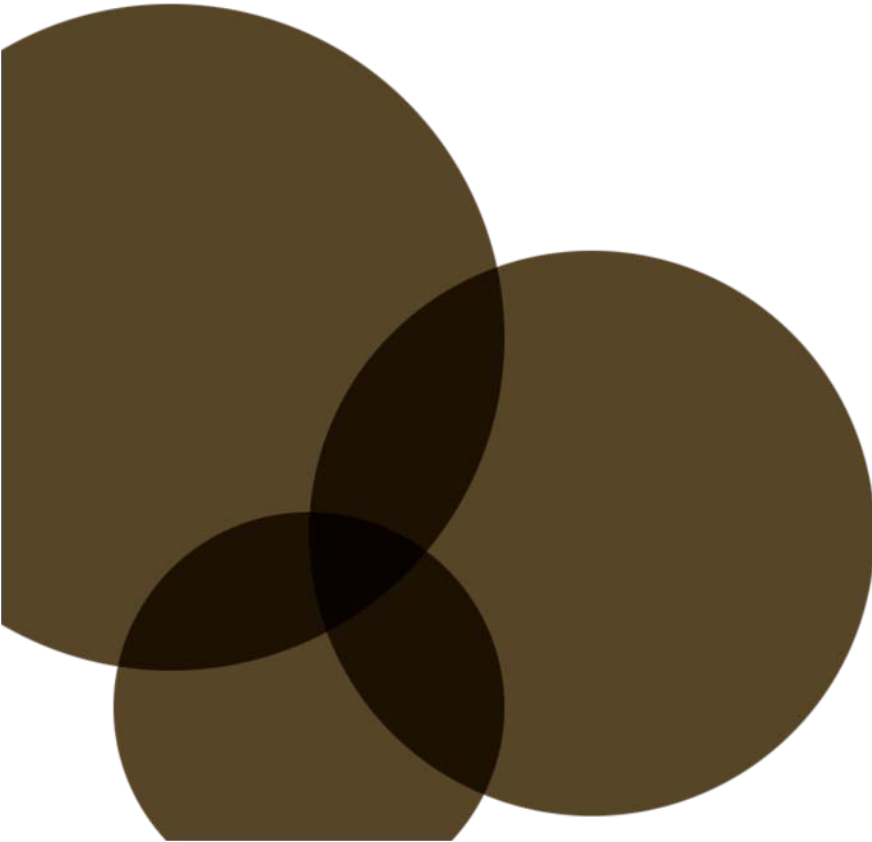
Sources: Search & Visits comScore Marketing Solutions 02/09

All UVs comScore MediaMetrix, 02/09; Exposed UVs comScore Marketing Solutions, 02/09

*CTR Source: DoubleClick DART for Advertisers January – July 2008

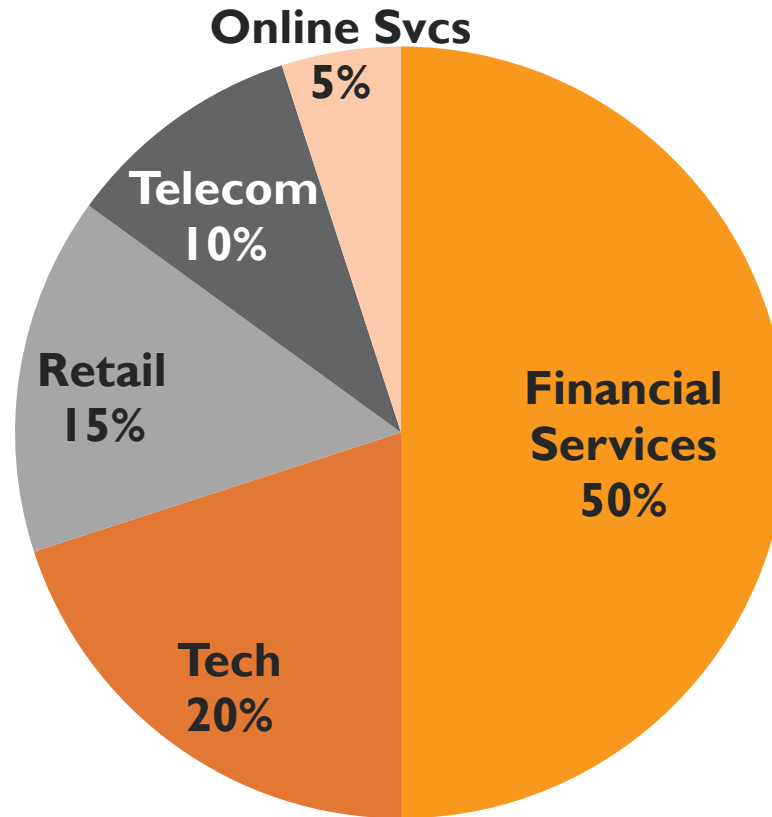


Business News



Top 20 Advertiser Categories

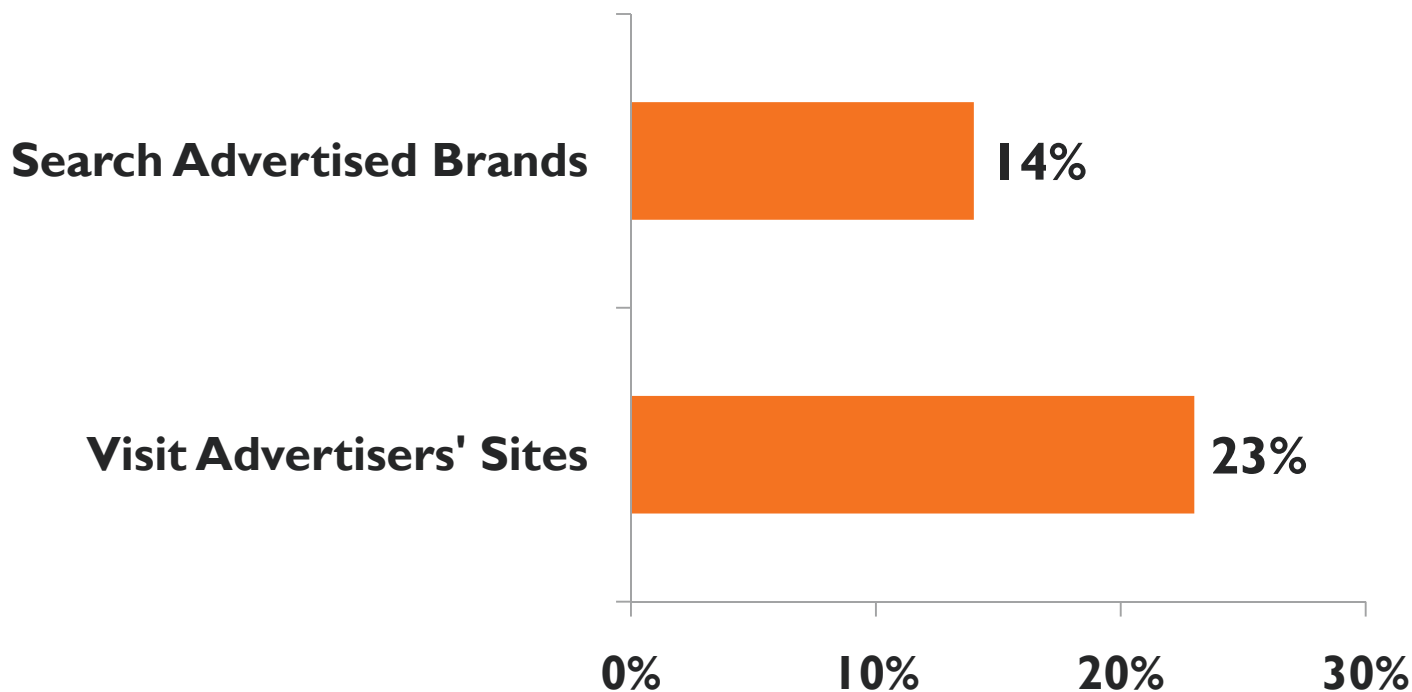
Top 20 Advertiser Categories: Business News



UVs Exposed to Ads on Business News Sites Engage with Advertised Brands

- One in seven searched, and more importantly about one in four visited the advertisers' sites

Business News UVs Exposed to Top 20 Advertising

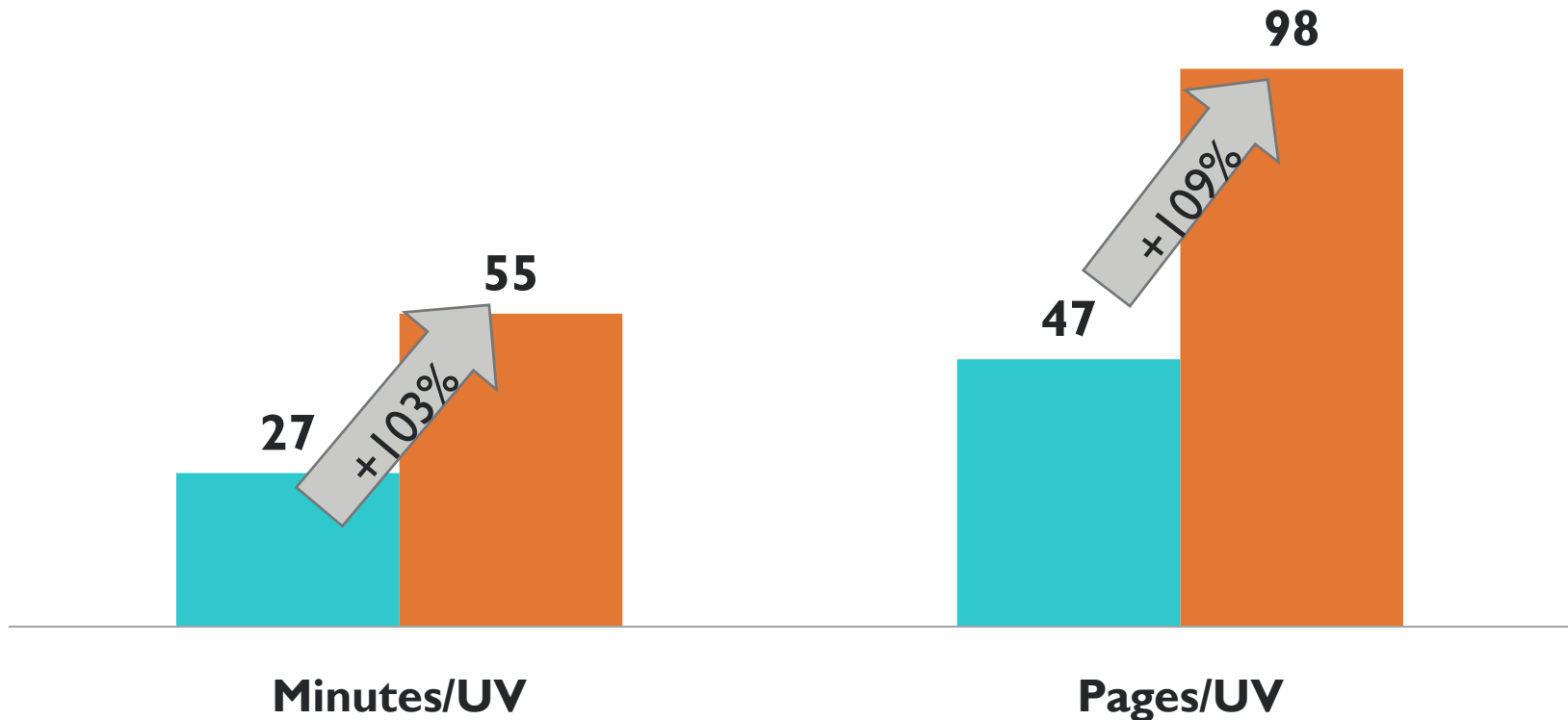


Base: 38.3 MM Exposed to at least one of top 20 advertisers
Source: comScore Marketing Solutions, 02/09

UVs Exposed to Ads Spent Twice the Time, Viewing 2x Pages on Ad Sites

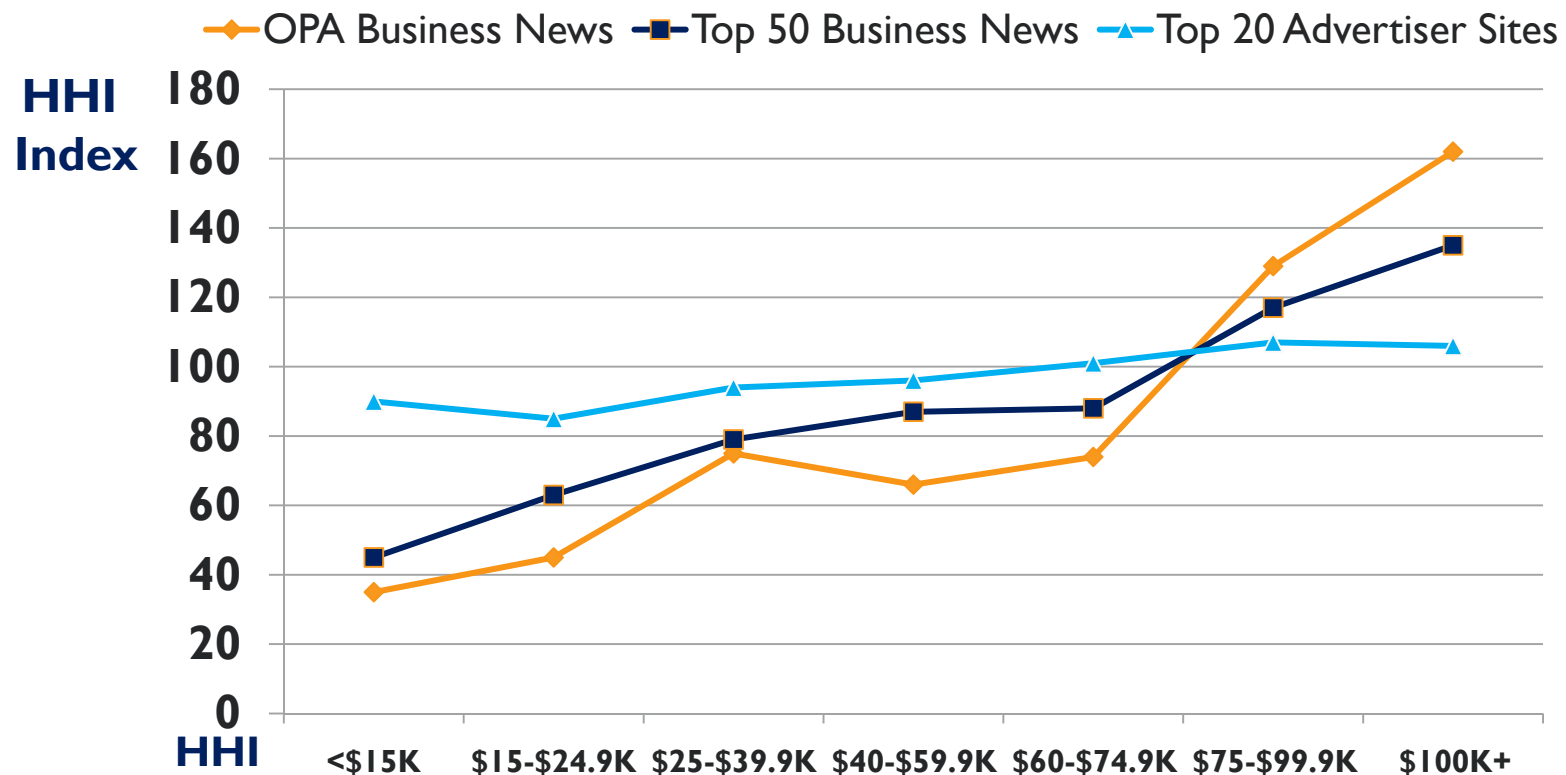
Advertiser Site Engagement

■ All UVs to Advertiser Site ■ Exposed Business News UVs



These Visitors Are of a Higher Quality, as Measured by Income

- While visitors to the advertiser sites index at the online average, those exposed to January's biggest ad campaigns who visited were higher income – especially those from OPA members in the business category
- Counter to clicks, the higher the income, the more likely those exposed to the ad visited the advertiser's site

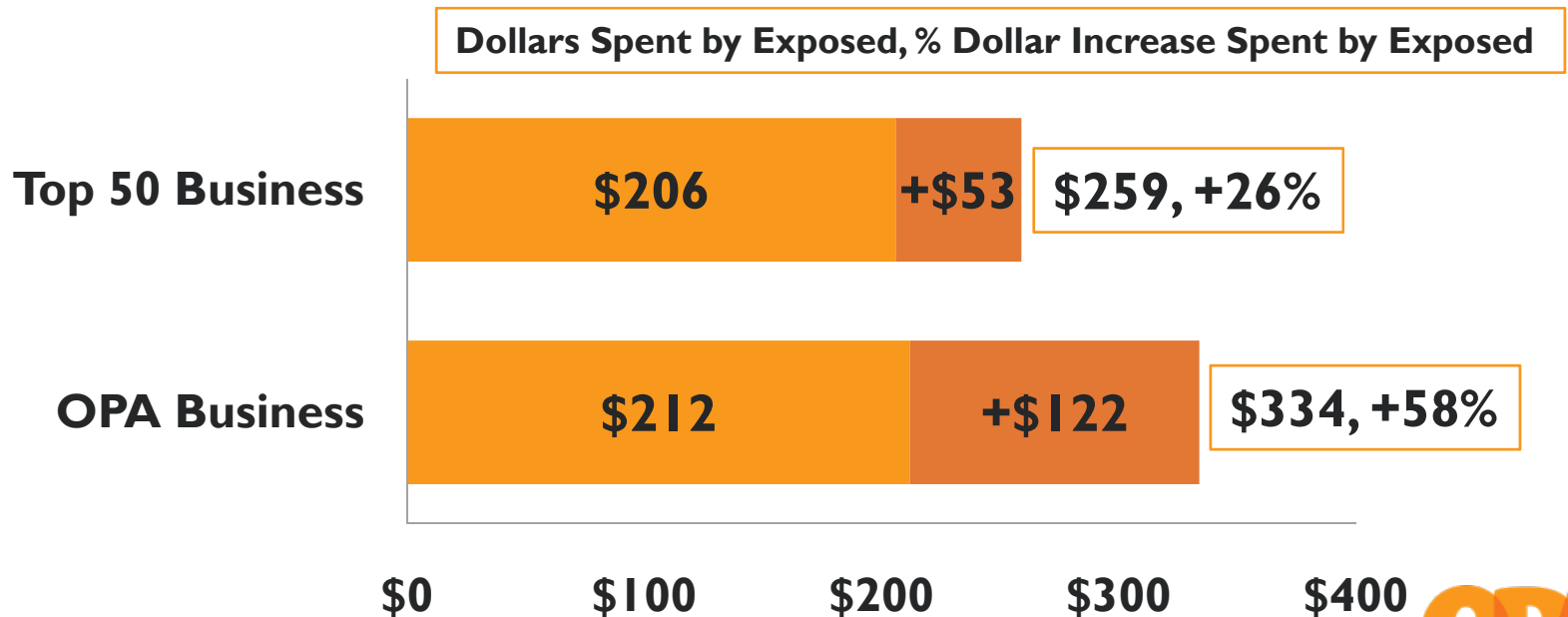


More Ecommerce Spending by Those Exposed to Ads on Business News Sites

- Ecommerce spending is greater for business news site visitors exposed to the top ad campaigns – especially among those seeing these ads on OPA business news sites

Ecommerce \$/Business News Visitor Feb '09

■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



More Spending on High Involvement Goods Correlates With Ad Exposure

Tech \$/Business News Visitor Feb '09

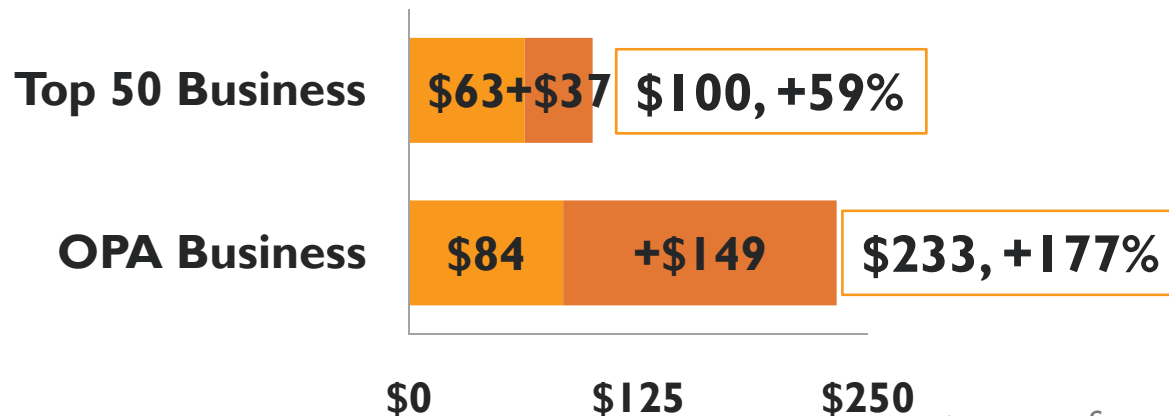
- Dollars Spent by Unexposed
- Additional Dollars Spent by Exposed

Dollars Spent by Exposed,
% Dollar Increase Spent by Exposed



- High involvement categories like Technology and Telecom show higher spending among those exposed to ads on OPA Business News sites

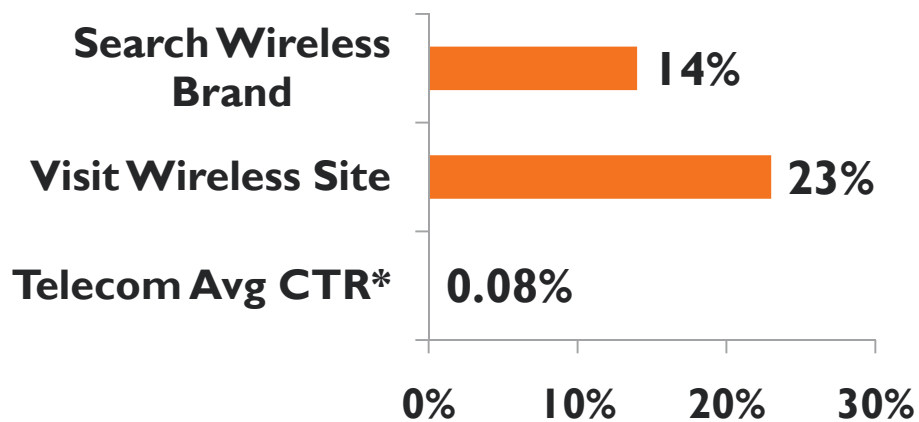
Telecom \$/Business News Visitor Feb '09



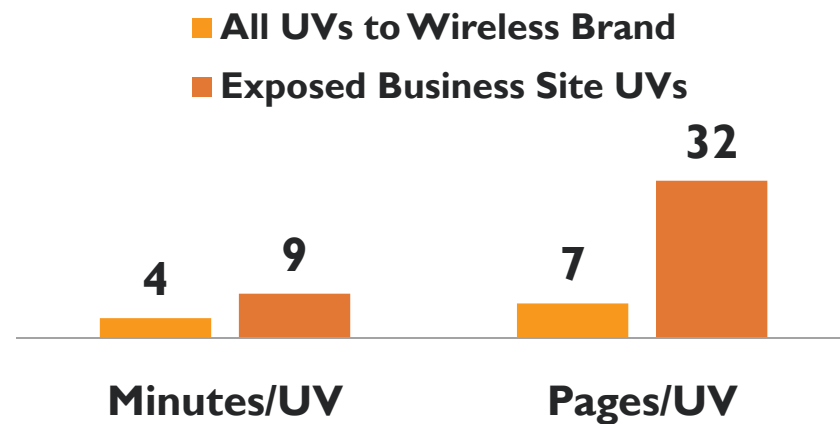
Results for a Wireless Advertiser

- A leading wireless company had higher traffic and visitor engagement among those exposed to advertising on Business News sites
 - As comparison, we provide Telecom's industry-wide CTR average

Business News UVs Exposed to Wireless Advertising



Engagement with Wireless Brand Feb '09



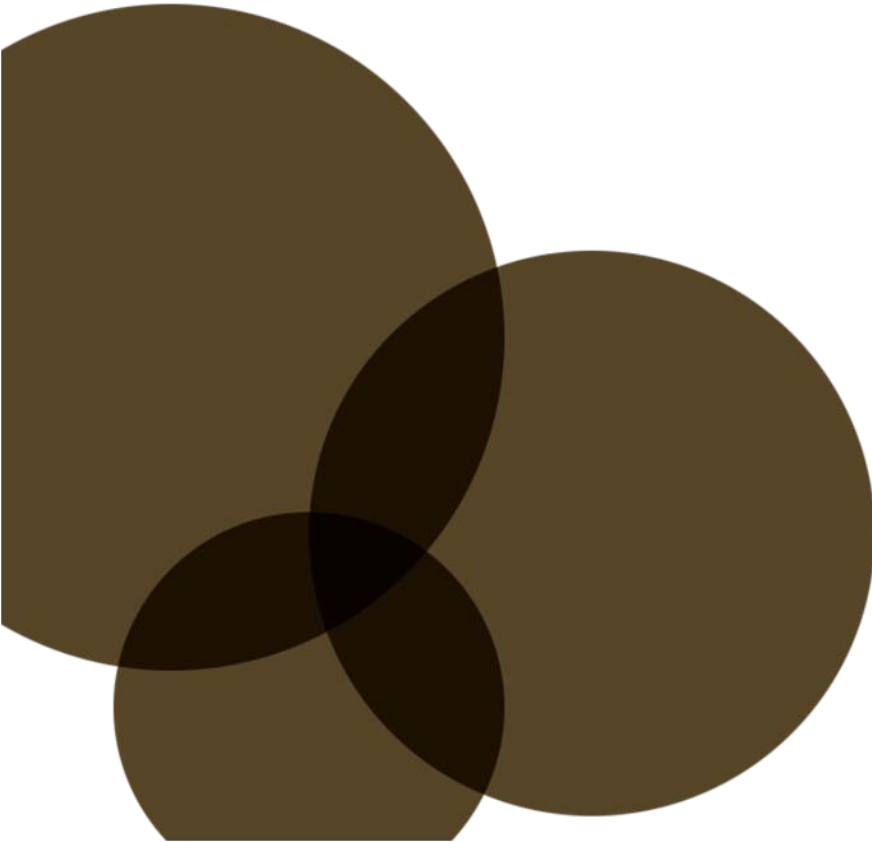
Sources: Search & Visits comScore Marketing Solutions 02/09

All UVs comScore MediaMetrix, 02/09; Exposed UVs comScore Marketing Solutions, 02/09

*CTR Source: DoubleClick DART for Advertisers January – July 2008



Conclusions





Key Findings

- There are more relevant ways to measure the branding impact of online ad campaigns beyond clicks – which is a Direct Response metric
- Search + Site Visitation + e-Commerce Spending [measured over time to account for latency effects] = a smart formula for measuring display advertising effectiveness
 - One in 5 exposed to display advertising conduct related searches for the advertised brands
 - One in 3 exposed to display advertising visit the advertised brands' sites
 - E-commerce spending in the advertised categories was significantly higher among online audiences exposed to the largest ad campaigns
- Environment Matters: There are differences in audience composition and behavior of those exposed to display advertising on content sites
 - Audiences exposed to display advertising are more engaged with advertisers' sites – staying longer and consuming more pages
 - Audiences exposed to display advertising that visit advertisers' sites have higher incomes than their typical visitors – and this positively impacts related online spending

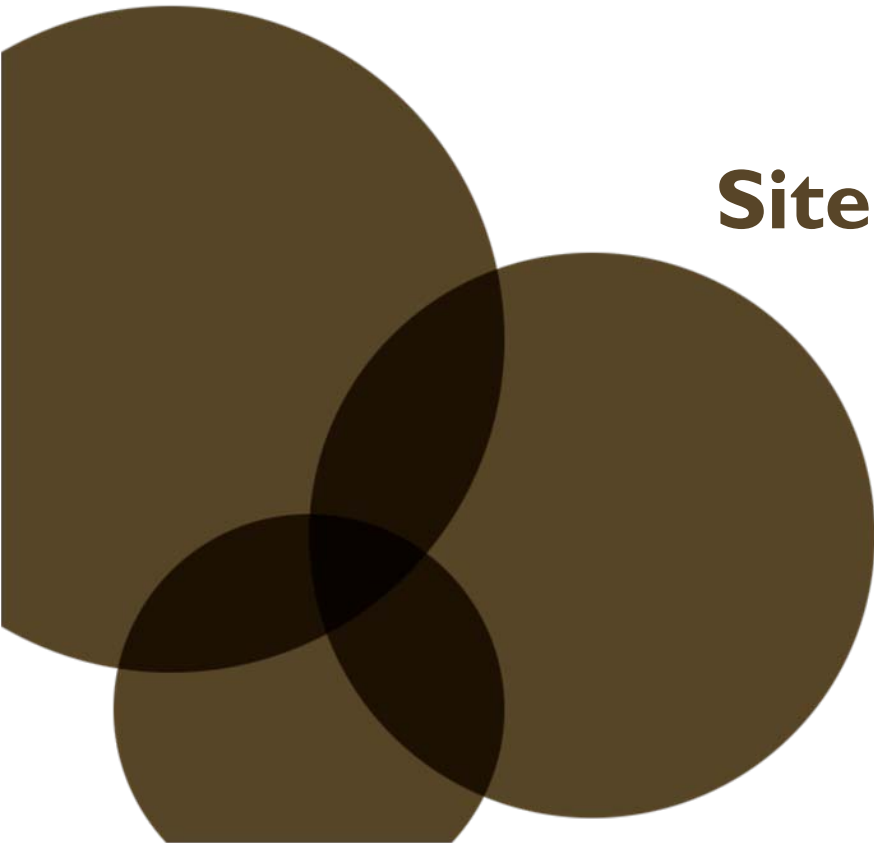


Key Findings (cont'd)

- Visitors exposed to display advertising spend more on e-commerce overall and in the advertised categories – *especially true for those viewing display ads on OPA Member sites*
 - **OPA News Sites** – average e-commerce spending by visitors exposed to ads was 15% higher (\$426) than those exposed on the Top 50 News sites
 - **OPA Sports Sites** – average e-commerce spending for those exposed to ads was 8% higher (\$241) than those exposed on the Top 50 Sports sites
 - **OPA Entertainment sites** – CPG spending after ad exposure was up 64% (\$100) compared to 13% on the Top 50 Entertainment sites
 - **OPA Business News sites** – average e-commerce spending by those exposed to ads was 21% higher (\$334) compared to those exposed on Top 50



Appendix: Sites by Content Category





Top 50 News & Information Sites

- **ABC News**
- AccuWeather Sites
- Advance Internet
- AOL News
- Associated Press
- BBC
- Belo
- **Boston.com**
- Buzzle
- **CBS News**
- **CNN**
- Community Newspaper Holdings, Inc.
- Cox Newspapers
- eHow
- **FOX News**
- **Gannett Sites & USAToday**
- **Gawker Media**
- **Guardian**
- Hearst Newspapers
- **Huffington Post**
- Lee Enterprises
- Legacy
- Mail Online
- McClatchy Corporation
- MediaNews Group
- MSN News & Weather
- **MSNBC**
- **MTVU**
- NBC Local Media
- **New York Magazine**
- Newsday
- **Newsweek**
- **NPR**
- **Reuters**
- **Scripps Interactive Newspaper Group**
- Scripps Television Station Group
- Sun-Times
- Telegraph Media Group
- The New York Post
- **The New York Times**
- **The Washington Post Company**
- **The Weather Channel**
- **Time**
- Times Online
- Topix
- Tribune Newspapers
- Weather Underground
- Weatherbug Property
- WorldNow
- Yahoo! News



Top 50 Business News Sites

- 1888 Press Release
- ADVFN
- Alley Insider
- All Business
- AOL Money & Finance
- Bankaholic
- BBC News - Business
- **Bizjournals**
- **Bloomberg**
- **BNET**
- **BusinessWeek Online**
- Businesswire.com
- Chicago Business
- CJ Online
- **CNBC**
- **CNN Money**
- Comcast.net Finance
- Economist
- Ed Week
- Fast Company
- Financial Times Group
- **Forbes**
- **FOX Business**
- Free-Press-Release
- Google Finance
- **Guardian Business**
- Hoovers
- IBD editorials
- IBTimes
- INC
- Investors.com
- Investor Words
- Kiplinger
- Manta
- Minyanville.com
- Morningstar
- Motley Fool
- MSN Money
- Nasdaq Property
- NYSE
- Principal.com
- **Reuters**
- Seeking Alpha
- Street Inside
- The Street
- **The Wall Street Journal**
- Times Online - Business
- Wikinvest
- Yahoo! Finance
- Zacks



Top 50 Sports Sites

- **About.com Sports and Recreation**
- Australianopen.com
- BNQT
- Bodybuildingforyou.com
- **CBS Sports**
- Comcast.net Sports
- Dead Spin
- Demand Media Sports
- Digital Sports
- Ehow Sports And Fitness
- **ESPN**
- Fanhouse
- FANIQ
- Fantasy Sports Ventures
- **FOX Sports on MSN**
- GN Outdoor (Gorilla Nation)
- Golf Channel
- **Hachette Filipacchi Men's Enthusiasts Network**
- highschoolsports.net
- InterMedia Outdoors
- International Speedway Corporation
- JUMPTV
- MLB
- **NASCAR**
- **NBA**
- NBC Sports
- NCAA
- NFL Internet Group
- NHL Network
- OFF-ROAD.COM
- **PGA Tour**
- Sher Dog
- Soccer.com
- SPEED Sites
- Sportgenic
- **Sporting News**
- SportNet
- Sports Direct
- **Sports Illustrated Sites**
- Sports Blogs, Inc.
- Sportsviews.com
- Stack Media
- Tampabayssuperbowl.com
- U.S Olympic Team Sites
- UFC
- Universal Sports
- **USAToday Sports**
- Vertical Sports Group
- Yahoo! Sports
- Yardbarker Sports Media



Top 50 Entertainment Sites

- A&E Interactive
- ABC Family
- ABC
- **About.com Entertainment**
- Access Hollywood
- AOL Music
- AOL Television
- ARTISTdirect Network
- Ask Men
- Asylum
- BET Networks
- **CBS Television**
- **Comedy Central**
- **Discovery Networks**
- E! Online
- ELYRICS
- **Entertainment Weekly**
- Fox Broadcasting
- Gray Television
- Jango Music Network
- Last.fm Ltd
- Lyrics.com
- Lyricsmode.com
- Macrovision
- Metro Lyrics
- MSN Music
- MSN TV
- **MTV Networks Music**
- MyFox
- MySpace Music
- **National Geographic Sites**
- NBC Network
- omg!
- PBS
- **People**
- Play List
- Rhapsody
- Ripe Digital Entertainment
- SOAPnet
- Sony Music Entertainment
- TMZ
- Tribune Broadcasting
- TV.COM
- Ultimate-guitar.com
- Universal Music Group
- Warner Music
- Windowsmedia.com Music
- WWE
- Yahoo! Music
- Yahoo! TV



For More Information

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