



Online Publishers
Association

A Sense of Place: Why Environments Matter

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Next Steps: OPA is available to present the study to:

- Agency media team
- Brand marketing team

Contact:

- Lisa Kerr, VP, Market Development – lkerr@online-publishers.org
- Andrea Nielsen, Director, Market Development – anielsen@online-publishers.org



OPA Members



“A good basic selling idea, involvement and relevancy, of course, are as important as ever, but in the advertising din of today, unless you make yourself noticed and believed, you ain't got nothin'.”

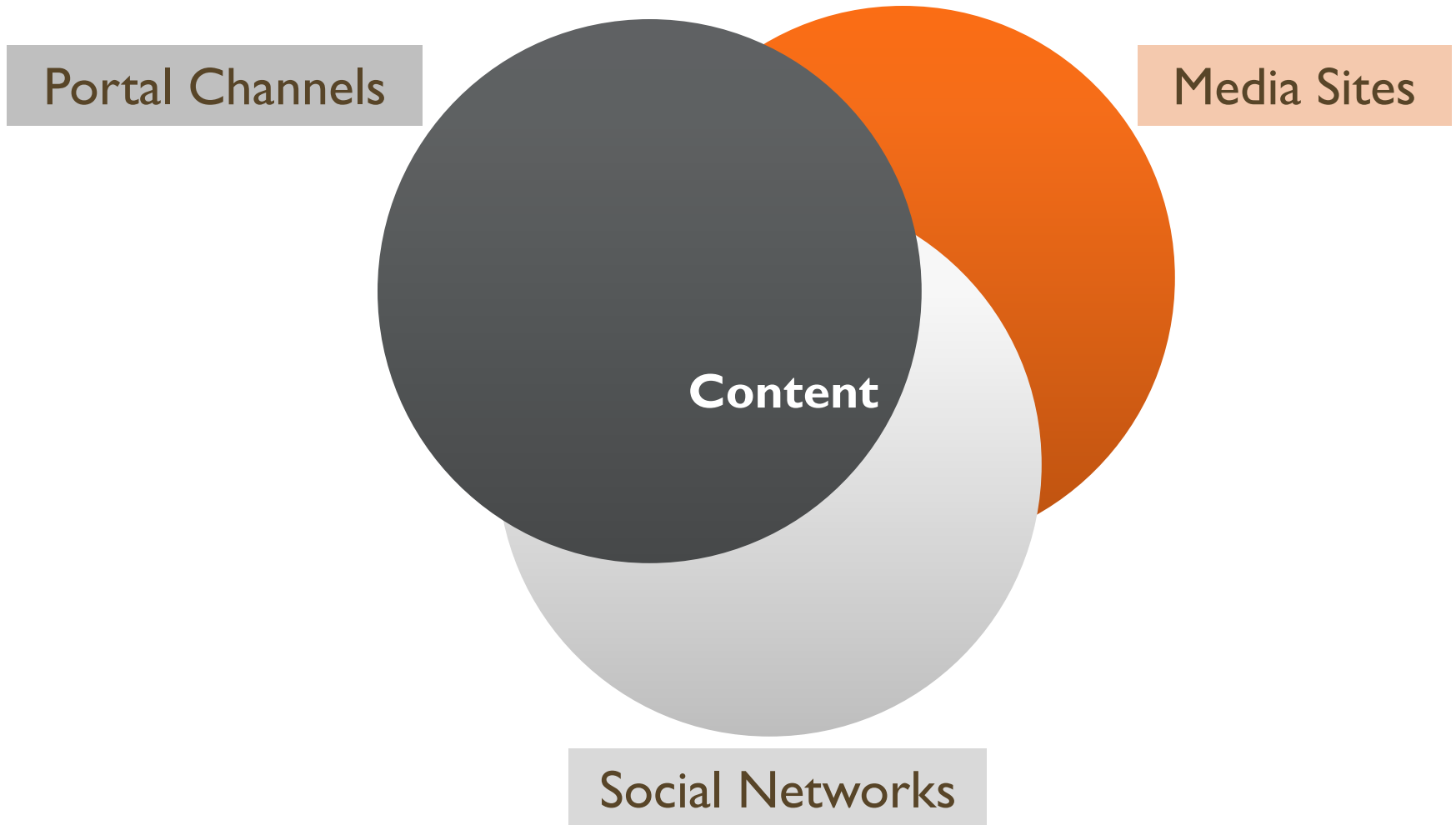
— Leo Burnett (1891–1971)



Research Objectives

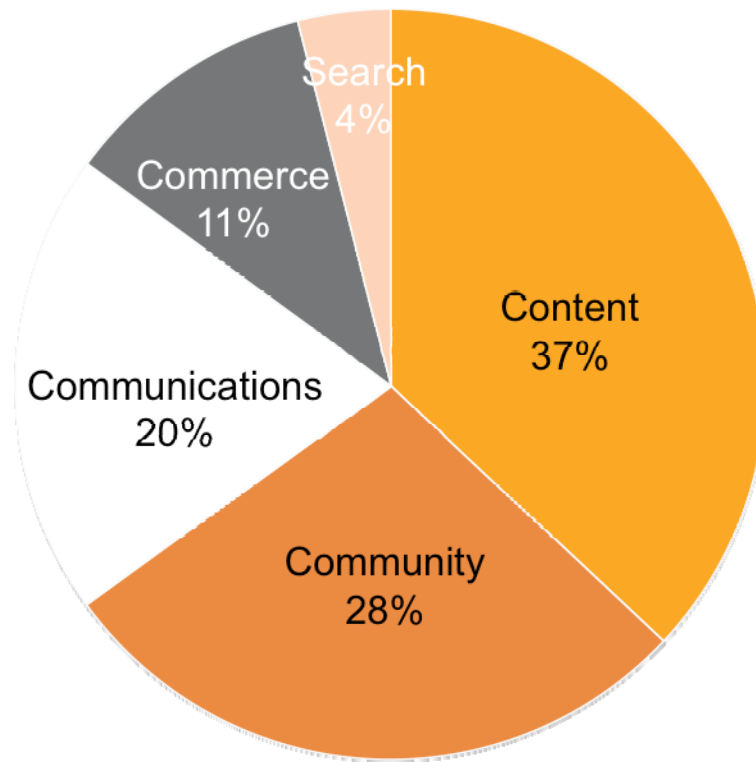
- Are different online environments perceived differently by consumers?
- Do consumer “connections” with content vary by environment?
- What impact do these “connections” have on a brand’s message?
- What are the implications for advertised brands when an audience makes an emotional connection to a site?

Content Exists Across Different Environments



Audiences Spend Almost 40% of Their Online Time With Content of Some Sort

- With Content and Community our study accounts for two-thirds of people's online time



**Internet Activity Index
Share of Online Time by Category
(2010 YTD Averages)**

Research Methodology



Methodology Overview

Two Phases

- **Quantitative** – an online survey of almost 3,000 U.S. adults to measure their feelings about the sites they frequent, the advertising on these sites, and their perceptions of these advertised brands
- **Qualitative** – in-depth one-on-one interviews of a subset of survey respondents to elaborate on their initial feedback and understand the “why’s” behind their answers



Methodology – Quantitative

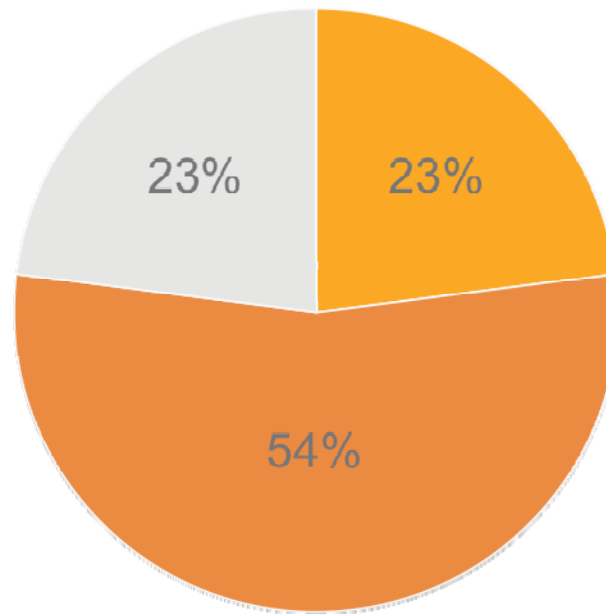
- Online survey of 2,910 respondents, fielded March 11 – April 19, 2010
 - Sample source: Harris Online Panel (HPOL)
- Respondents were qualified on these dimensions:
 - U.S. residents ages 18+
 - No sensitive industry employment (e.g., market research, advertising, media)
 - Use Internet at least one day per week
 - Visit at least one site in study at least several times per month
- Respondents evaluated up to four of 63 pre-selected sites
 - Sites were aggregated from Business News, Entertainment, Food & Lifestyle, News and Sports segments – culling the largest brands in each segment based on unique visitors to create a proxy for content environments (UV source: comScore)
 - Sites selected from the top 15 are OPA members (42) and portal channels (19); social media sites are also included (2)
 - 6,222 individual site evaluations (averages ~2 evaluations per respondent)
- Demographic data, Internet usage and connection weighted to US online population (source: Harris Telephone Poll Surveys)
- Average survey length: 18 minutes

Same Audience – Different Environments

- Three-fourths visit more than one site category, reflecting similar audiences accessing different environments

**Number of Categories Accessed
Based on 63 Sites in Study**

■ 1 Category ■ 2 Categories ■ 3 Categories



BASE: All respondents (N=2910)
Categorized from Q. Which of the following websites, if any, do you typically access? Please select all that apply.



Methodology – Qualitative

- One-on-one follow-up interviews were conducted with survey respondents to further assess respondents' opinions about the sites they visit and online advertising
- Eleven individuals were recruited from various parts of the country
- Field dates: April 20 – April 22, 2010
- Interviews were 20 to 30-minutes long
- Each respondent was paid \$50

Our Model of Online Environments



Why Environments Matter



Harris' Emotional Connection and Fit

Customer Connection

Emotional Connection

The gut reaction the customer has about your brand

“I love this brand!”

Self-Fit

The degree to which your brand fits the customer's self-image

“This brand is appropriate and fits my lifestyle and needs.”

In a two-year modeling effort conducted by Harris, *Emotional Connection* and/or *Fit* are in the **top three drivers** of behavior in **seven different industries**

Audiences & Content

Creating Superior Environments Requires...

Involvement
with a Site
impacts

Perceptions
of Content,
which impacts

Perceptions
of Advertisers,
which impacts

Responses to
Ads, which leads
to

Closing
the Sale

**Dimensions
That Matter ...**

Loyalty

Connection

Fit

Site Quality



Are Based Upon....

Trust

Relevance

Timeliness

Advocacy
(WOM)



A Word About Correlations

- In our research, we use correlations to measure the strength of a relationship between the answers to two questions (i.e, two variables)
 - Correlations range from -1 to $+1$
 - A perfect relationship = 1 or -1 ; no relationship = 0
 - Correlations of $.4$ or higher are strong; $.3$ to $.4$ moderately strong; $.15$ - $.3$ 'interesting' and below $.15$ weak
 - In survey research, we rarely see correlation coefficients over $.7$
- Correlation is not causation

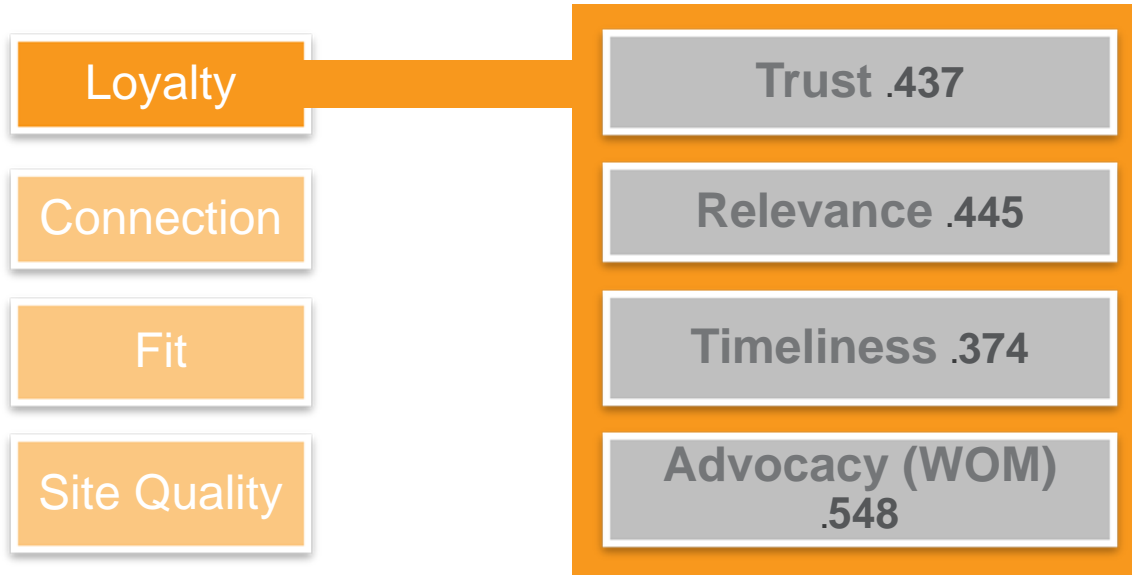
Quality Content Engenders Loyalty to a Site

Correlations from .3 to .5+ are moderately strong to strong

**Dimensions
That Matter ...**



Are Based Upon....



All Aspects of Content Relate to How Consumers Emotionally Connect with a Site

Correlations from .3 to .5+ are moderately strong to strong

**Dimensions
That Matter ...**



Are Based Upon....

Loyalty

Connection

Fit

Site Quality

Trust .490

Relevance .469

Timeliness .426

Advocacy (WOM)
.564

Content Impacts How Well a Site Fits with a Consumer's Needs

Correlations from .3 to .5+ are moderately strong to strong

**Dimensions
That Matter ...**



Are Based Upon....

Loyalty

Connection

Fit

Site Quality

Trust .469

Relevance .472

Timeliness .412

Advocacy (WOM)
.520

Content Corresponds with How Consumers Rate a Site's Quality

Correlations from .3 to .5+ are moderately strong to strong

**Dimensions
That Matter ...**



Are Based Upon....

Loyalty

Connection

Fit

Site Quality

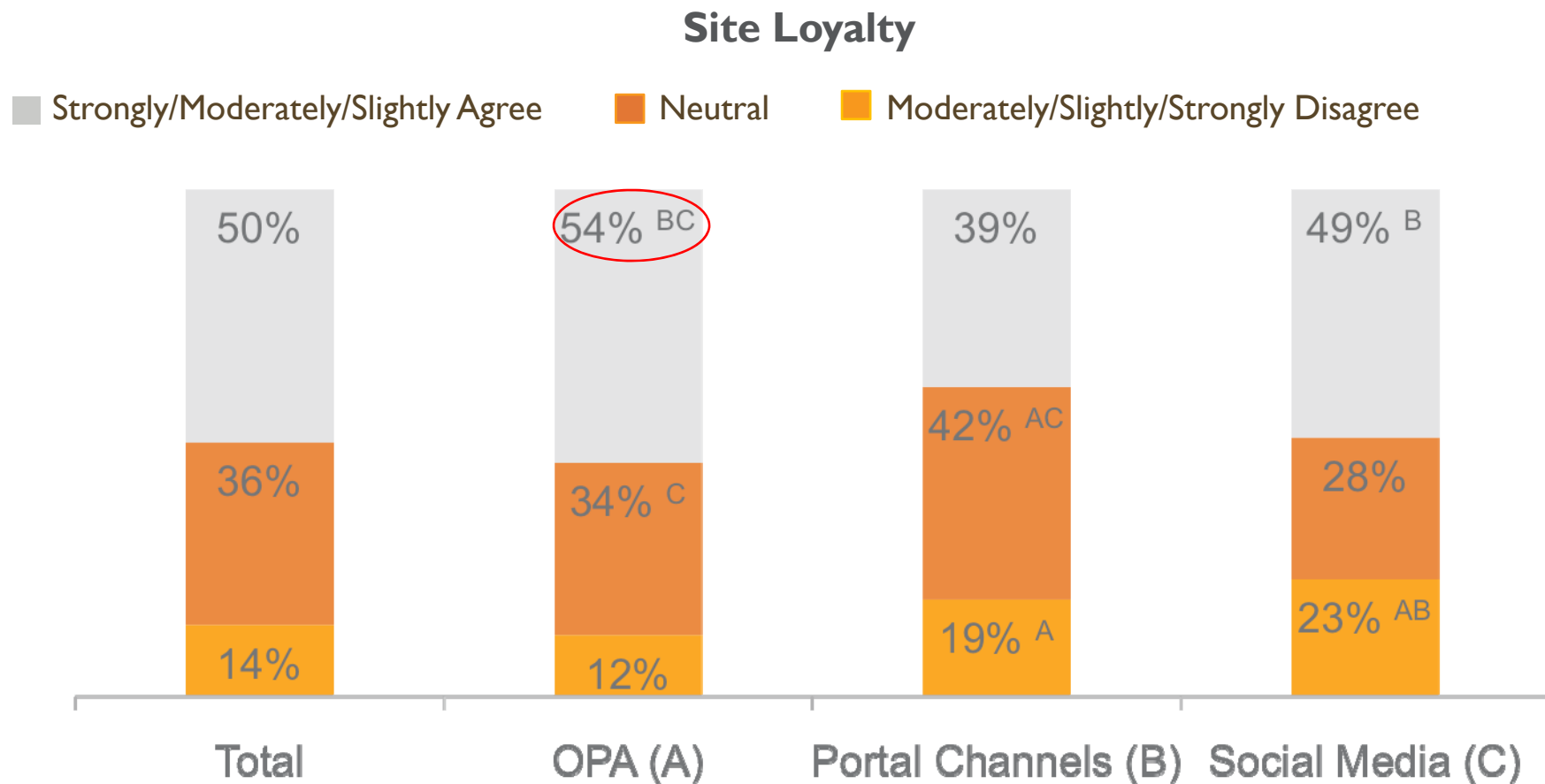
Trust .479

Relevance .435

Timeliness .423

Advocacy (WOM)
.511

Audiences are Most Loyal to Media Sites; Least Loyal to Social Media



BASE: Site Ratings Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)

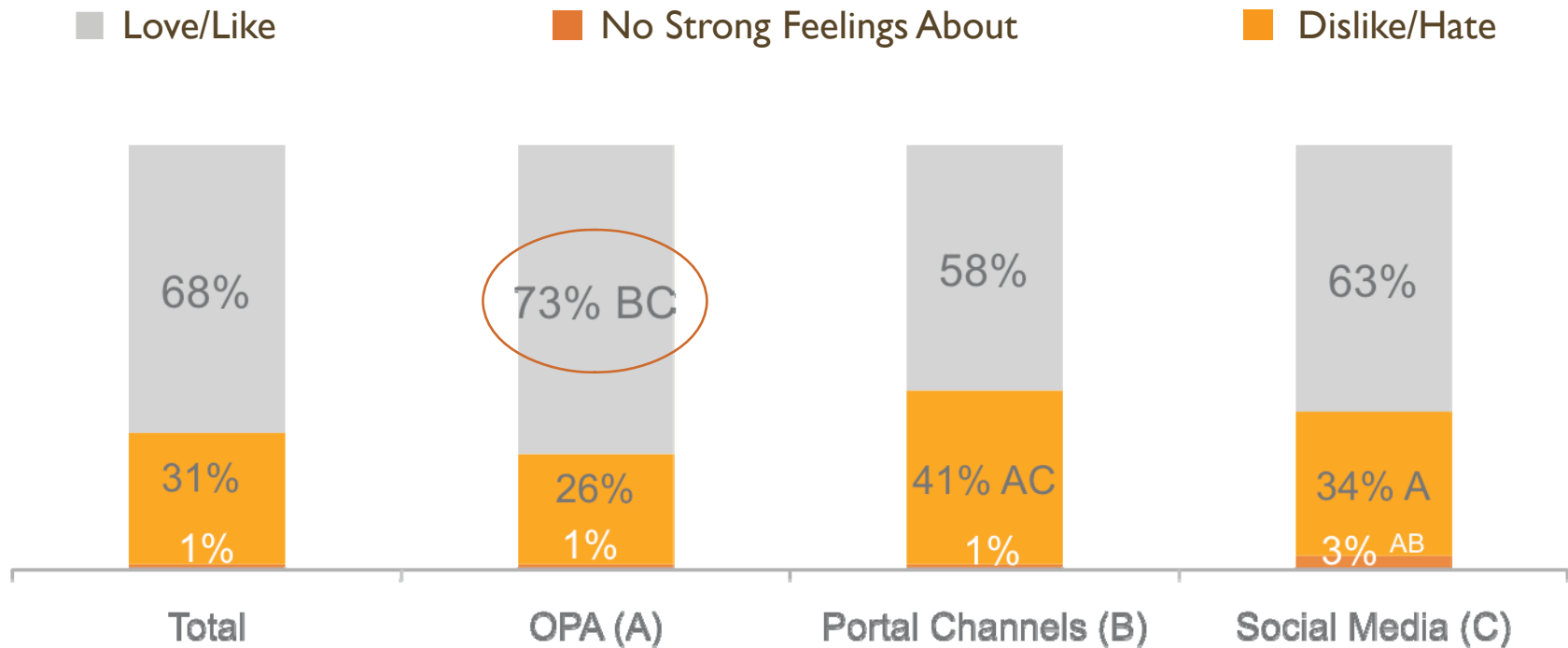
Q. On a 7-point scale where 1 = Strongly disagree and 7 = Strongly agree,
How much do you agree or disagree with the following statement:

I feel very loyal to [SITE]

Superscripted capital letters (^{A,B,C}) indicate statistically significant differences at 90% confidence between site categories

Media Site Visitors are More Likely to Have Strong Positive Feelings About These Sites

Emotional Connection to a Site From Love to Hate

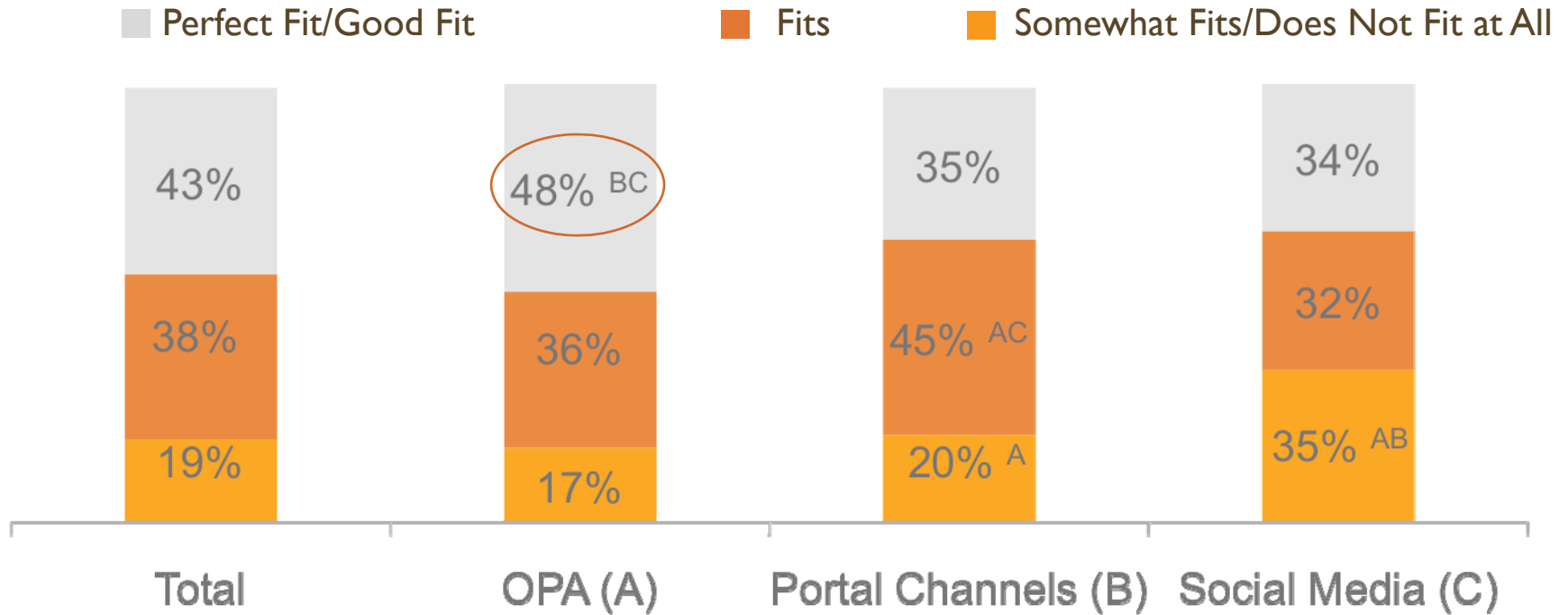


BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)
Q.Thinking about [SITE], would you say that it is a site you ...

Superscripted capital letters (^{A,B,C}) indicate statistically significant differences at 90% confidence between site categories

Media Sites are also More Likely to “Fit” with Consumers

Site’s Fit With Info/Entertainment Needs From “Perfect Fit” to “Not At All”



BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)
Q. Thinking about [SITE], would you say that the site
...your information/entertainment needs

Superscripted capital letters (^{A,B,C}) indicate statistically significant differences at 90% confidence between site categories

Social Media Most Likely to Generate WOM

Ways Sites Are Discussed (% 'Yes')

Ways Discussed	Total	OPA (A)	Portal Channels (B)	Social Media (C)
Any (Net)	50	50^B	43	71^{AB}
Conversation in-person	35	37 ^B	31	39 ^B
Email	19	19 ^B	16	32 ^{AB}
Conversation over the phone	18	18 ^B	14	22 ^{AB}
Posting on a personal webpage	6	4 ^B	3	30 ^{AB}
Instant Messaging (IM)	5	3	4	20 ^{AB}
Text messaging	5	4	3	17 ^{AB}
Commenting on content or a post about the site	4	3	3	10 ^{AB}
Posting to site's message boards	2	2	2	7 ^{AB}
Message boards/Forums	2	2	2	3
None of these	50	50^C	57^{AC}	29

BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)

Q In which of the following ways, if any, have you discussed or commented on [SITE] in the past?

Please select all ways that apply to this site.



Advertising & Content



Advertising & Content - Introduction

- Audiences typically find content on media sites to be more
 - Trustworthy
 - Relevant
 - Timely
 - And are more willing to recommend that content to others
- Does this matter for brands? That is, does the online environment and its content impact how advertisers are viewed? For example, where and when are brands considered more
 - Reputable and of higher quality
 - Relevant
 - Respected

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Fit

Site Quality

▶ **Are Based Upon....** ▶

Trust

Relevance

Timeliness

Advocacy
(WOM)

**Together with
Advertising Perceptions of ...**

Quality
Products

Relevant
Brands

Respected
Brands

Trusted Content Relates to How Audiences View Advertisers

Correlations of .3+ are moderately strong

**Dimensions
That Matter ...**



Are Based Upon....



**Together with
Advertising Perceptions of ...**

Loyalty

Connection

Fit

Site Quality

Trust

Relevance

Timeliness

Advocacy (WOM)

Quality
Products .388

Relevant
Brands .331

Respected
Brands .343

The More Relevant the Content, the More Relevant, Respected and Reputable the Advertised Brand

Correlations of .3+ are moderately strong; .2 to .3 fair

**Dimensions
That Matter ...**



Are Based Upon....



**Together with
Advertising Perceptions of ...**

Loyalty

Connection

Fit

Site Quality

Trust

Relevance

Timeliness

Advocacy (WOM)

Quality
Products .331

Relevant
Brands .333

Respected
Brands .289

Timely Content Also Impacts Advertising Perceptions

Correlations of .reflect a .2 to .3 fair relationship

**Dimensions
That Matter ...**



Are Based Upon....



**Together with
Advertising Perceptions of ...**

Loyalty

Connection

Fit

Site Quality

Trust

Relevance

Timeliness

Advocacy (WOM)

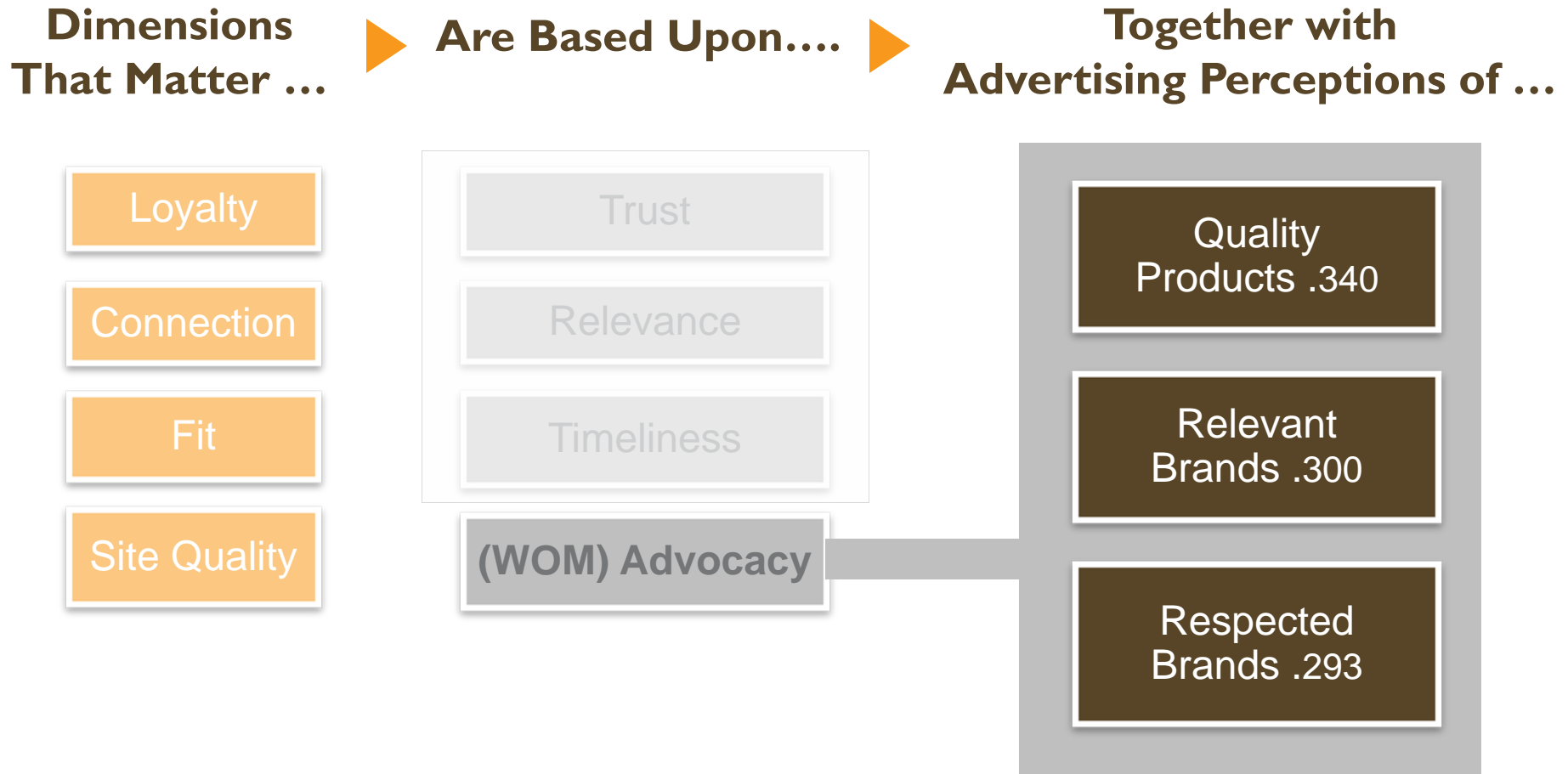
Quality
Products .293

Relevant
Brands .243

Respected
Brands .269

... as Does the Willingness to Recommend a Site to Family and Friends.

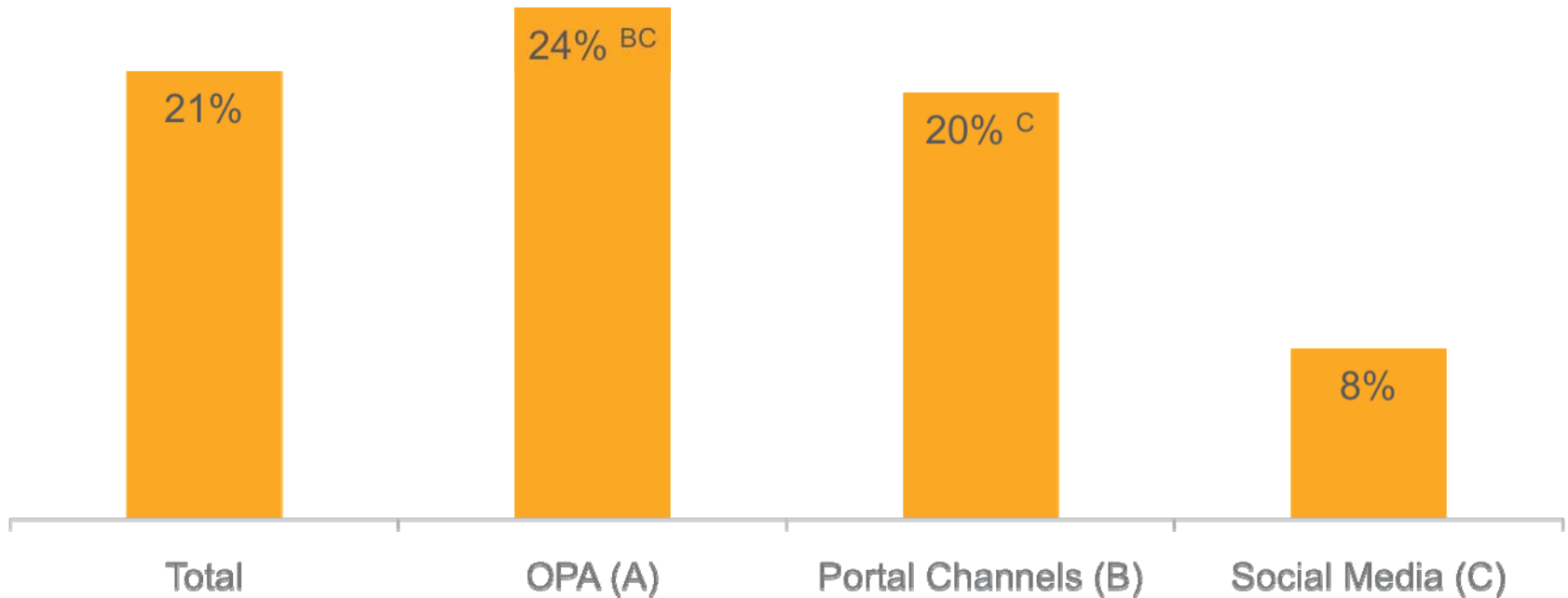
Correlations of .reflect a .2 to .3 fair relationship; .3+ are moderately strong





Advertisers are Deemed Higher Quality on Media Sites

**Advertisers are High Quality / Reputable
Top 2 Box
Agree Completely / Agree**



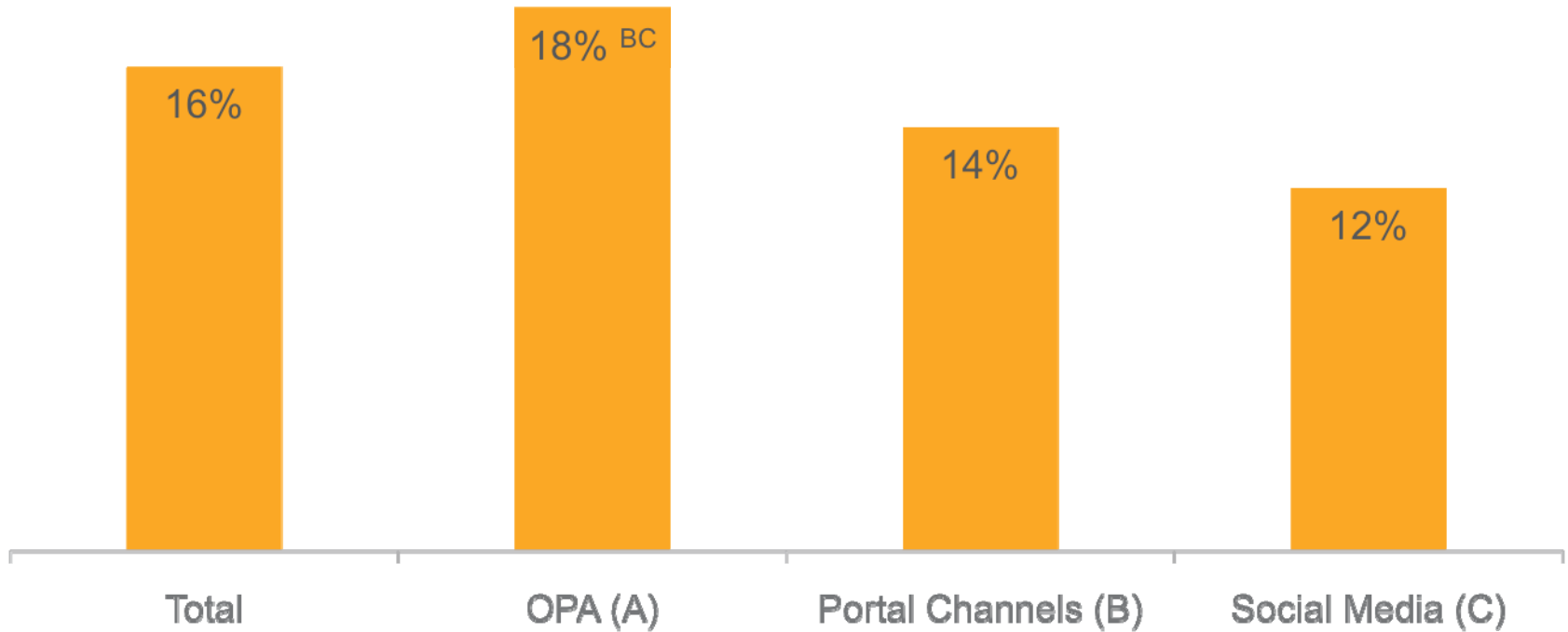
BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

Q. Please indicate how much you agree or disagree with the following characteristics regarding [SITE]:

I can feel assured that products and services advertised on [SITE] are of high quality and are from reputable vendors

Relevant Content Translates to More Relevant Advertisers on Media Sites

Relevant Brands Top 2 Box Strongly/Somewhat Agree



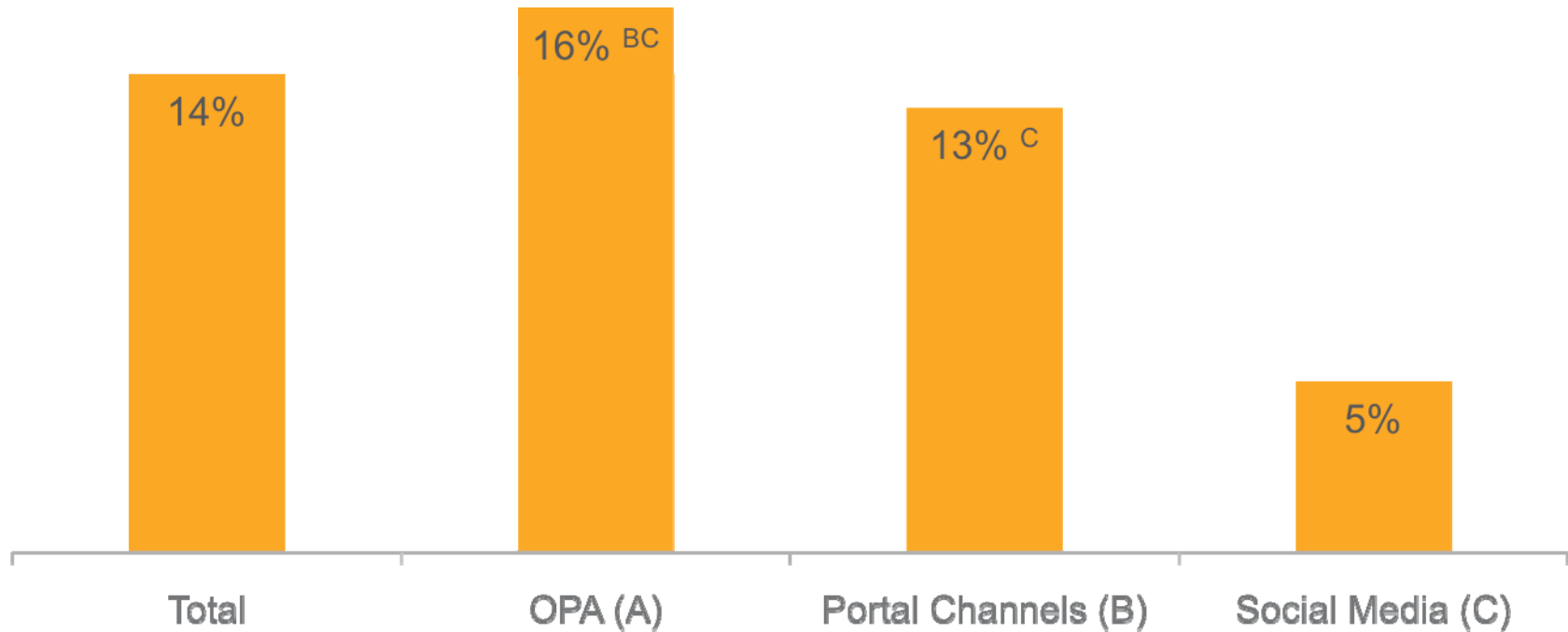
BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

Q. Please indicate how much you agree or disagree with the following characteristics regarding [SITE]:

The brands advertised on [SITE] are generally more relevant to people like me than are the ads on other sites

Compared to Other Sites, Media Site Visitors are More Likely to View Advertisers as Respected

Respected Brands Top 2 Box Strongly/Somewhat Agree



BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

Q. Please indicate how much you agree or disagree with the following characteristics regarding [SITE]:

[SITE] advertises brands that are more respected compared to other sites

36

Superscripted capital letters (^{A,B,C}) indicate statistically significant differences at 90% confidence between site categories



Brand Perceptions & Advertising Responses



Brand Perceptions & Ad Responses - Introduction

- A site's content is strongly correlated with how it's advertisers are perceived
 - The more trusted, relevant, and timely the content and the greater the willingness to recommend the site to others...
 - The more reputable, relevant and respected are the advertised brands
- But do positive advertising perceptions inspire consumer responses?

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**Dimensions
That Matter ...**

Are Based Upon...

**Together with
Advertising
Perceptions of ...**

**With the
Business
Outcome of ...**

Loyalty

Connection

Fit

Site Quality

Trust

Relevance

Timeliness

Advocacy
(WOM)

Quality
Products

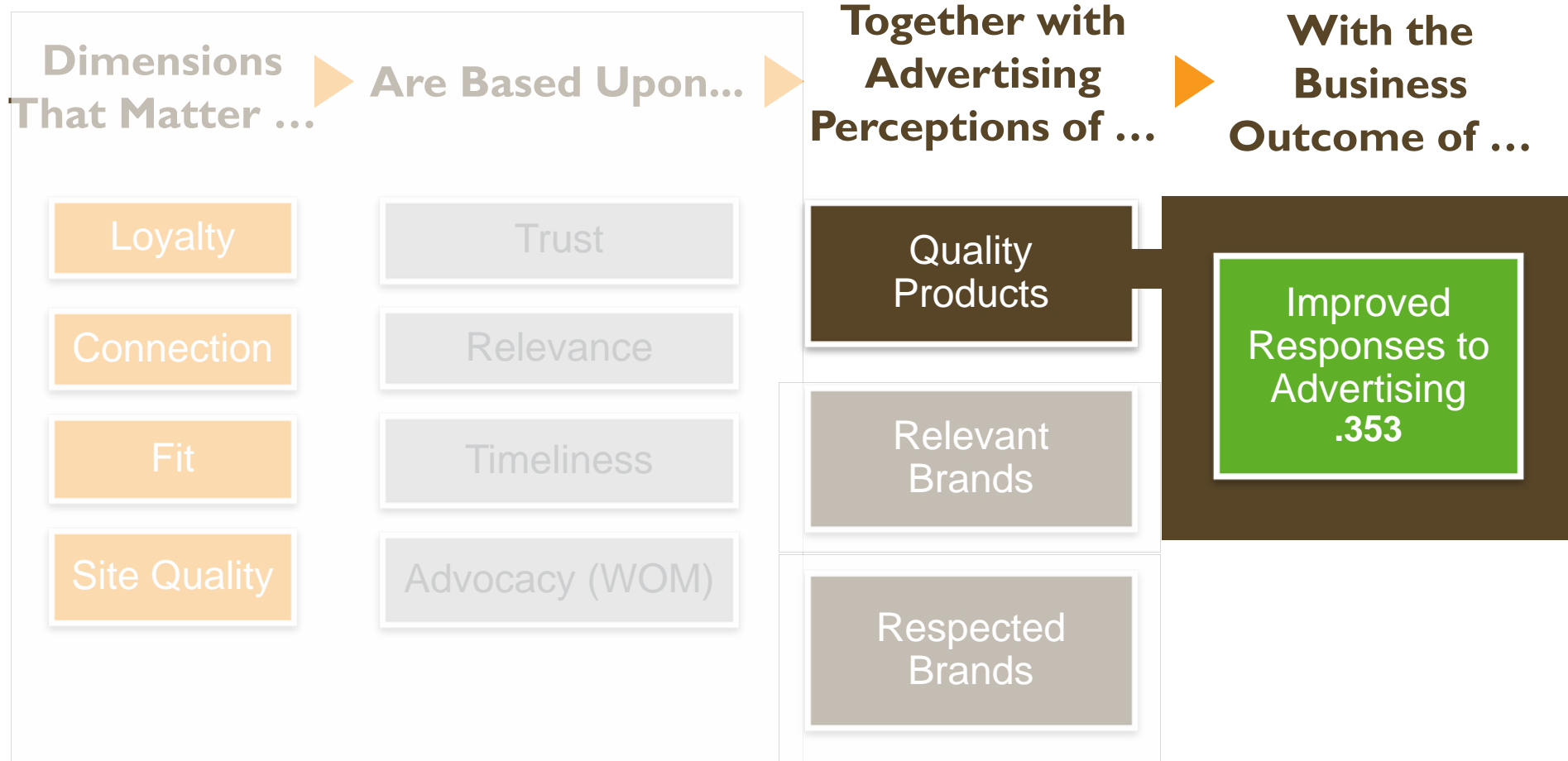
Relevant
Brands

Respected
Brands

Improved
Response to
Advertising

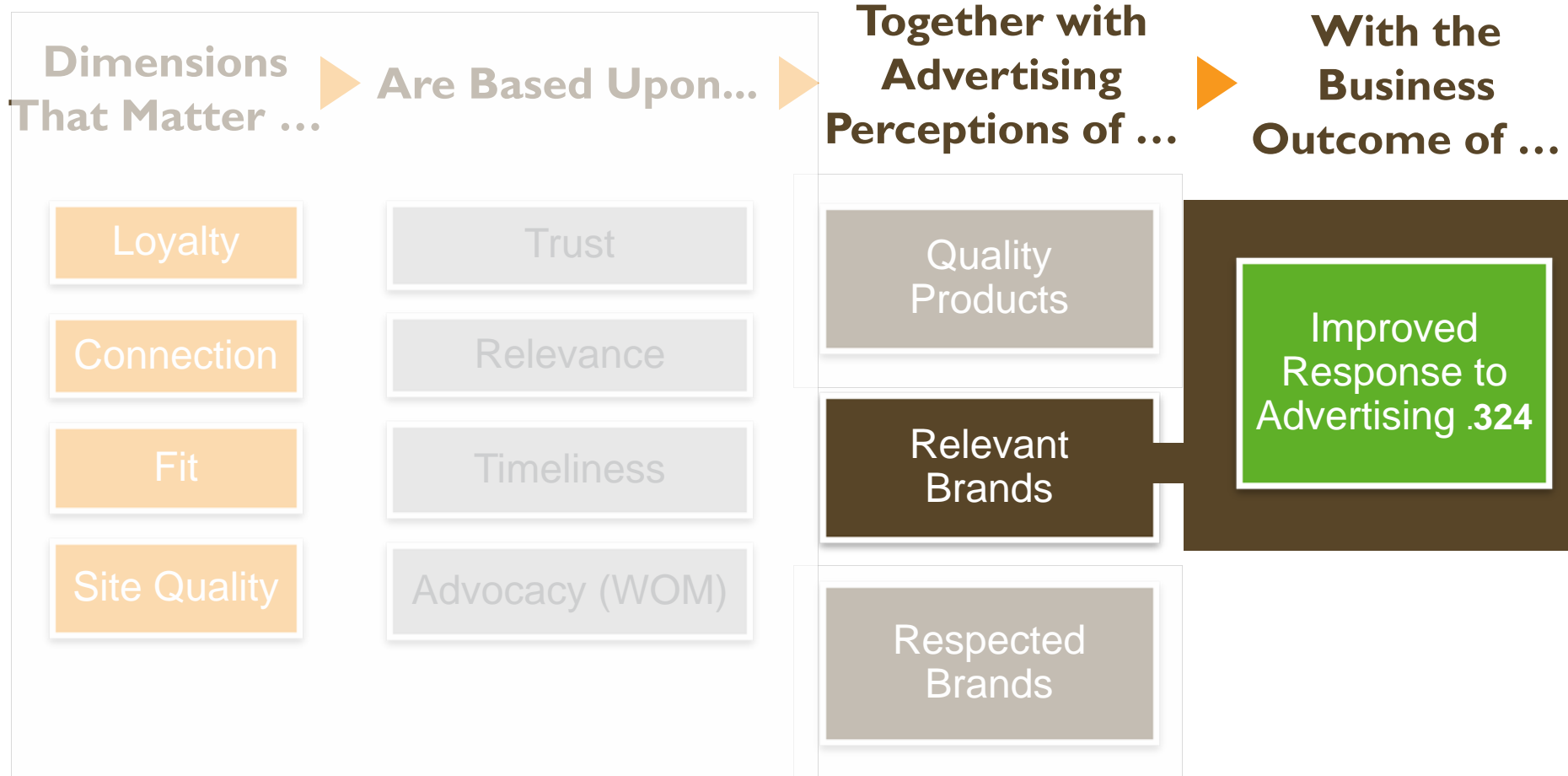
Advertisers Perceived as Offering Quality Products are More Likely to Garner a Response

Correlations of .3+ are moderately strong



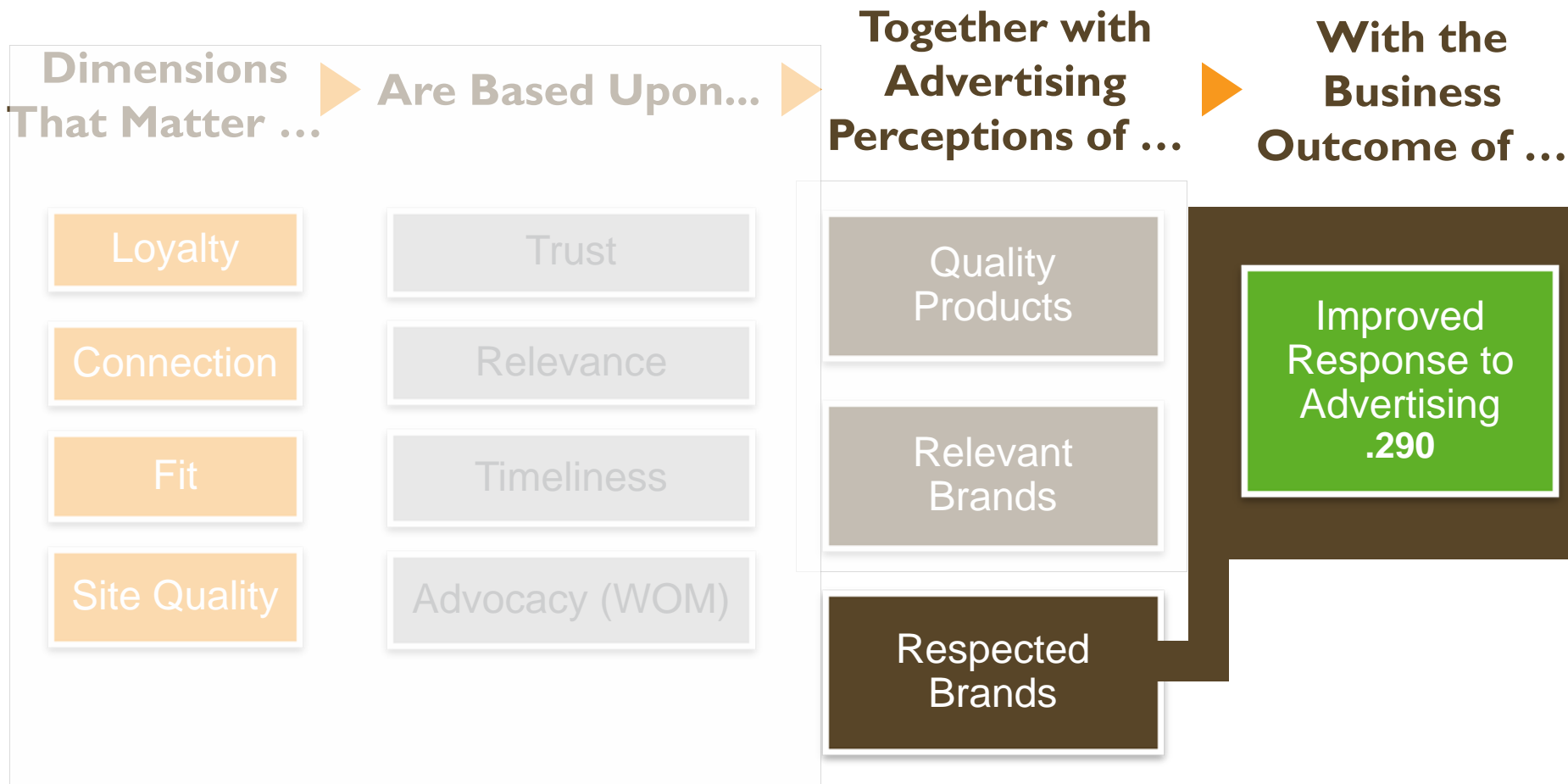
The More Relevant the Brand, the More Likely Consumers Will Respond to its Online Advertising

Correlations of .3+ are moderately strong



Respected Brands More Likely Garner Consumer Response to Their Online Advertising

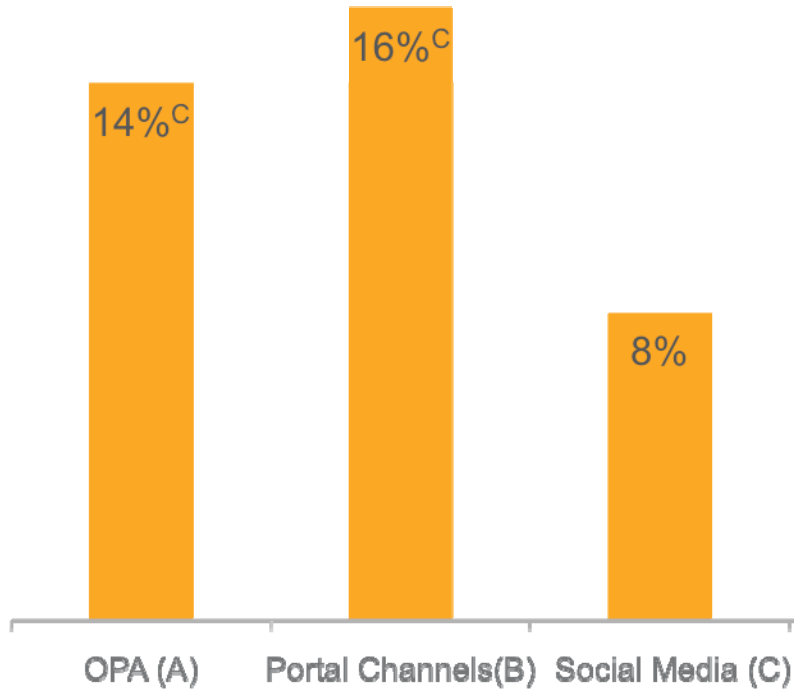
Correlations of .3 are fair



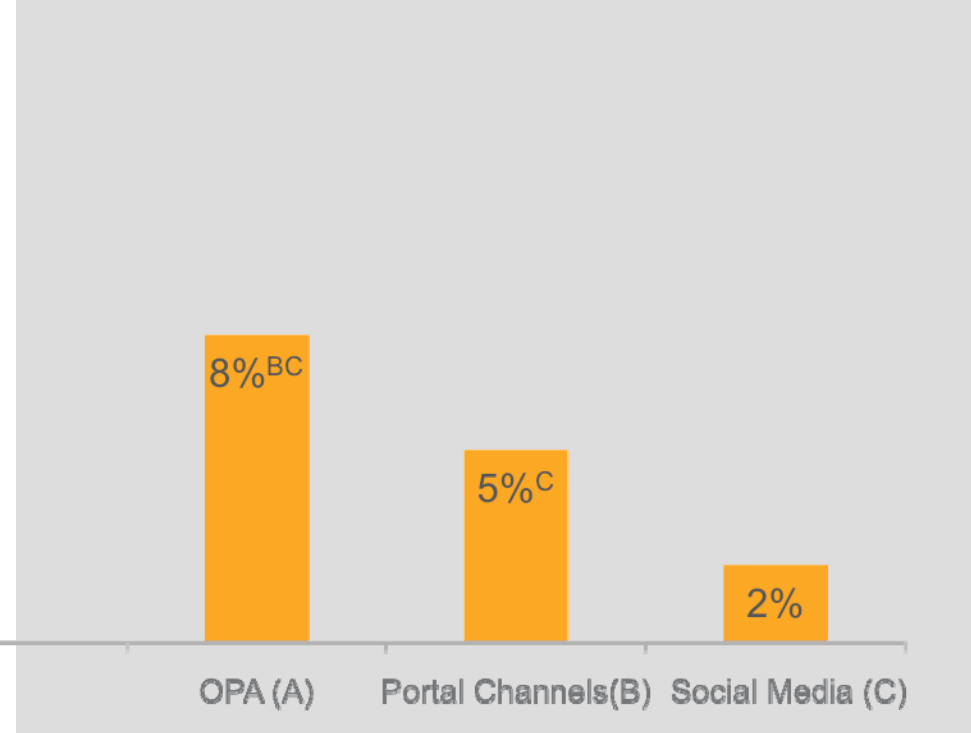


Portal Channels More Likely to Lead to Search; Media Sites Impact Purchases

Brand Searches



Purchases



BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

Q Which of the following have you ever done as the result of seeing an ad on[SITE]: Searched for more information about the product or service; Made a purchase

Site Involvement & Ad Response



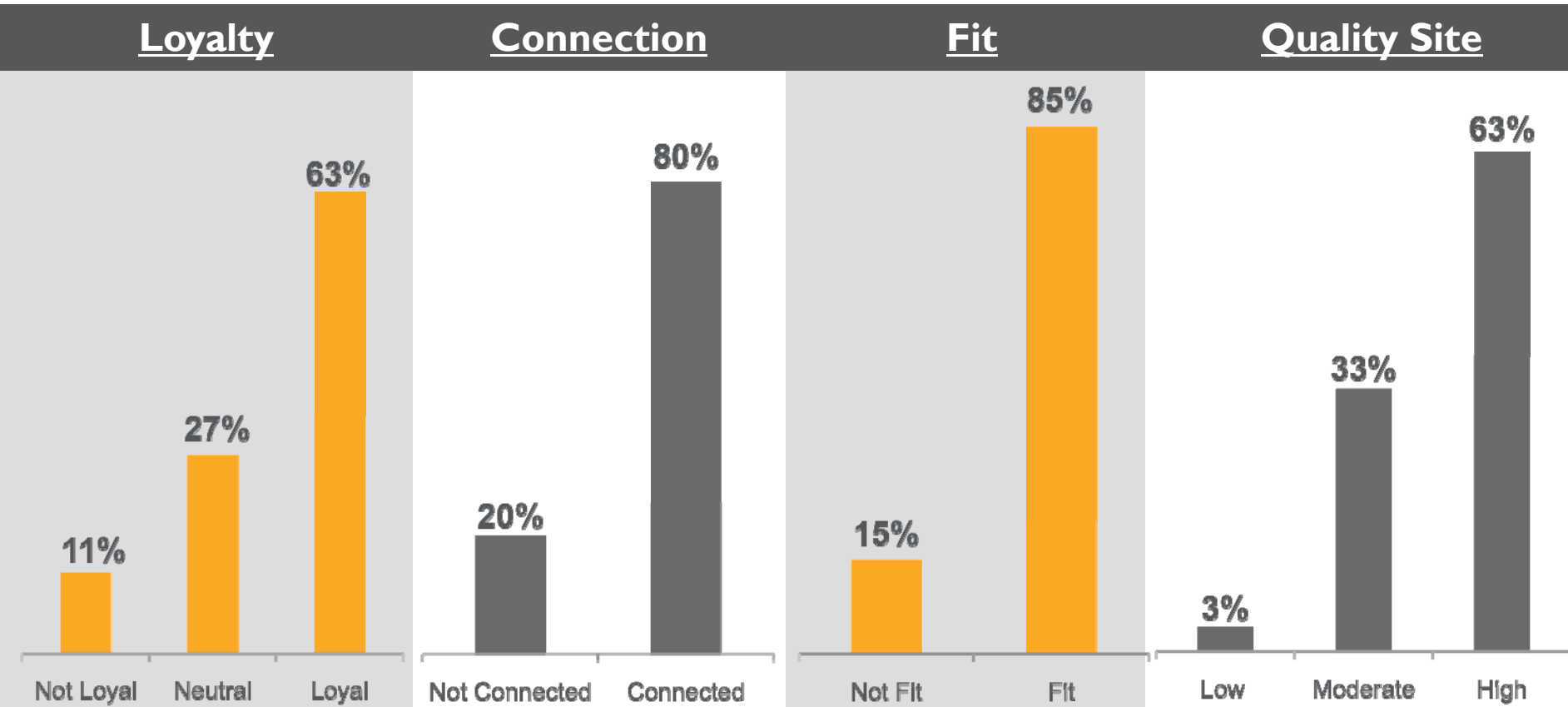
Site Involvement & Ad Response

- A site's content impacts
 - Loyalty
 - Emotional connections
 - Fits with information and entertainment needs
 - The site's perceived quality
- And we saw that OPA member environments garnered greater loyalty, stronger connections, tighter fits and higher quality
- But should loyalty, emotion, fit and site quality matter to brands?



Audiences Acting on a Site's Advertising Have Very Strong Relationships with These Sites

Site Profiles of Responders to Online Ads (Any response from Search to Purchase)



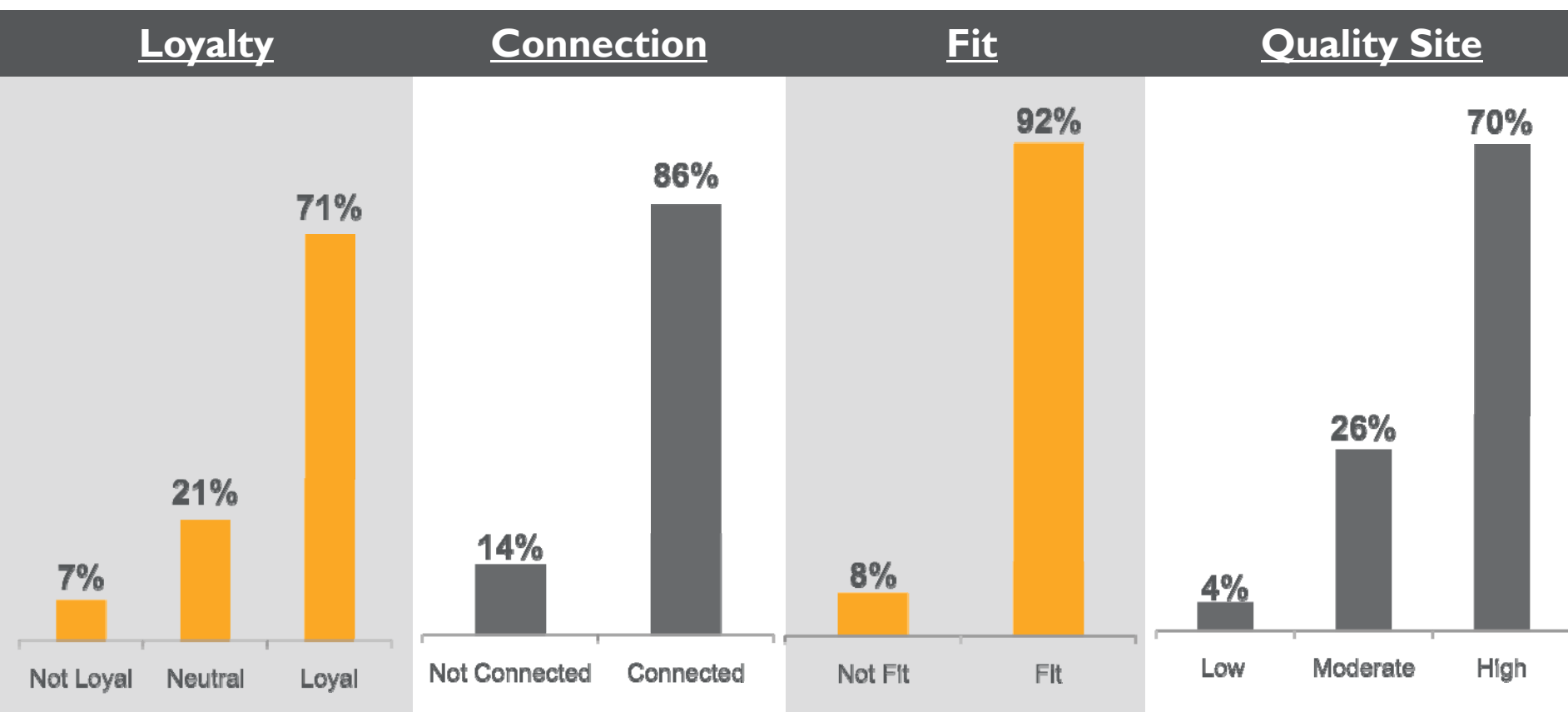
BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

Q Which of the following have you ever done as the result of seeing an ad on[SITE]: [Took Action]

Q Site Quality Q Site Loyalty Q Site Connection Q Site Fit

Audiences Who Purchase From a Site's Advertisers Have a Much Deeper Relationship with the Site

Purchaser Profile Among those Purchasing from Online Ads

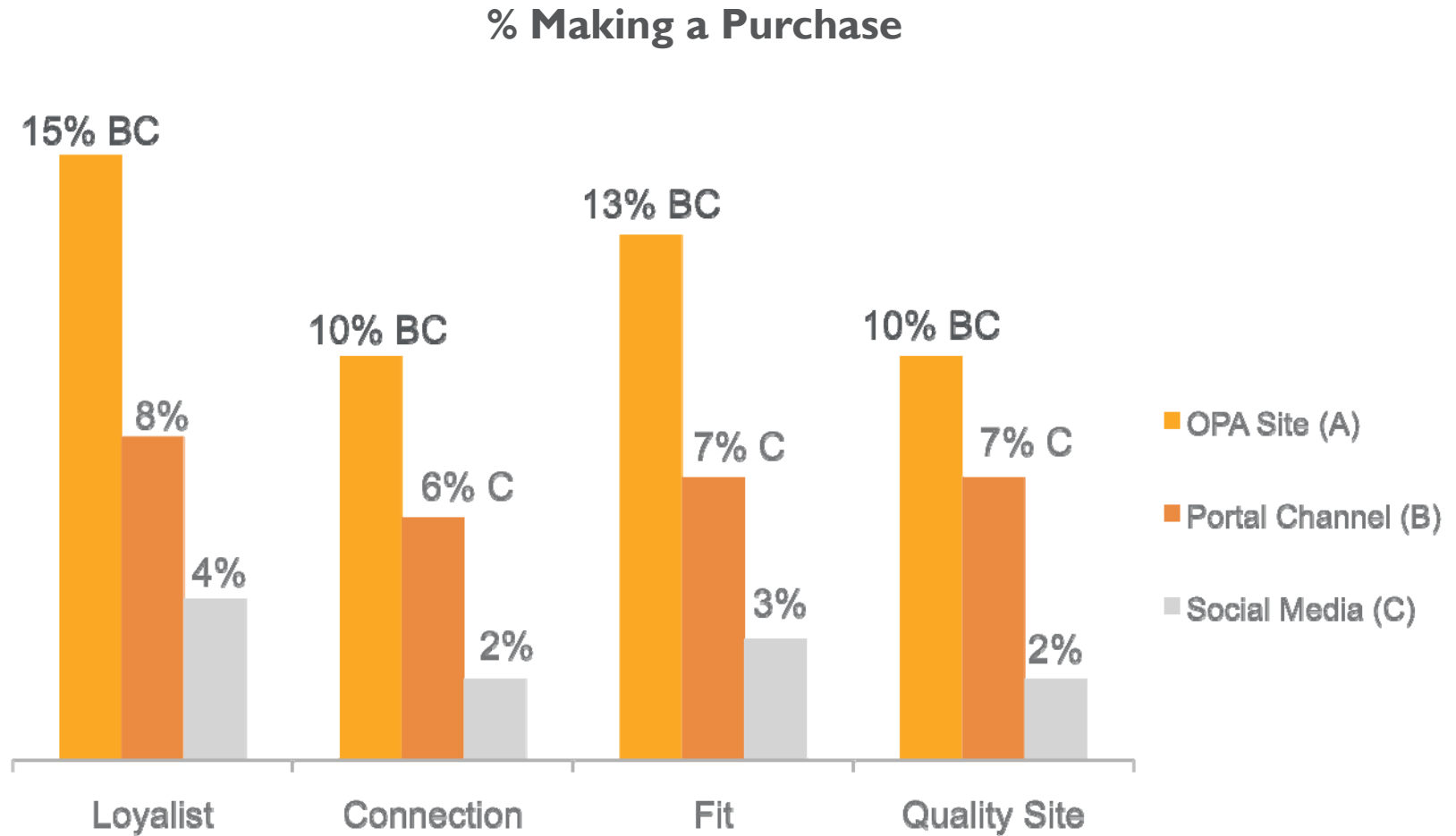


BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)

Q Which of the following have you ever done as the result of seeing an ad on [SITE]: Made a purchase

Q Site Quality Q Site Loyalty Q Site Connection Q Site Fit

Visitors with Loyalty, a Connection or Fit to a Media Site More Likely Make Purchases From Advertisers



BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)

Q Which of the following have you ever done as the result of seeing an ad on[SITE]: Made a purchase

Q Site Quality Q Site Loyalty Q Site Connection Q Site Fit

48

Superscripted capital letters (^{A,B,C}) indicate statistically significant differences at 90% confidence between site categories





Key Takeaways

- Positive content perceptions impact how involved consumers are with different online environments
 - Media sites have greater site involvement and more positive content perceptions than other online environments
- Audiences are more likely to have positive brand perceptions of advertisers on sites where they have positive content perceptions
 - Advertisers on media sites are more likely viewed as reputable, relevant and respected



Key Takeaways (cnt'd)

- Quality sites with deeper audience involvement more likely have advertising acted upon
 - Those responding to ads on a site are overwhelmingly more loyal and emotionally attached to the site
- Loyalists to media sites, those emotionally connected to media sites and consumers who believe these sites fit their needs are much more apt to purchase from their advertisers than those who feel similarly about social network or portal channels

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