



Online Publishers  
Association

# The Silent Click: Building Brands Online

June 2009

*Conducted in partnership with*





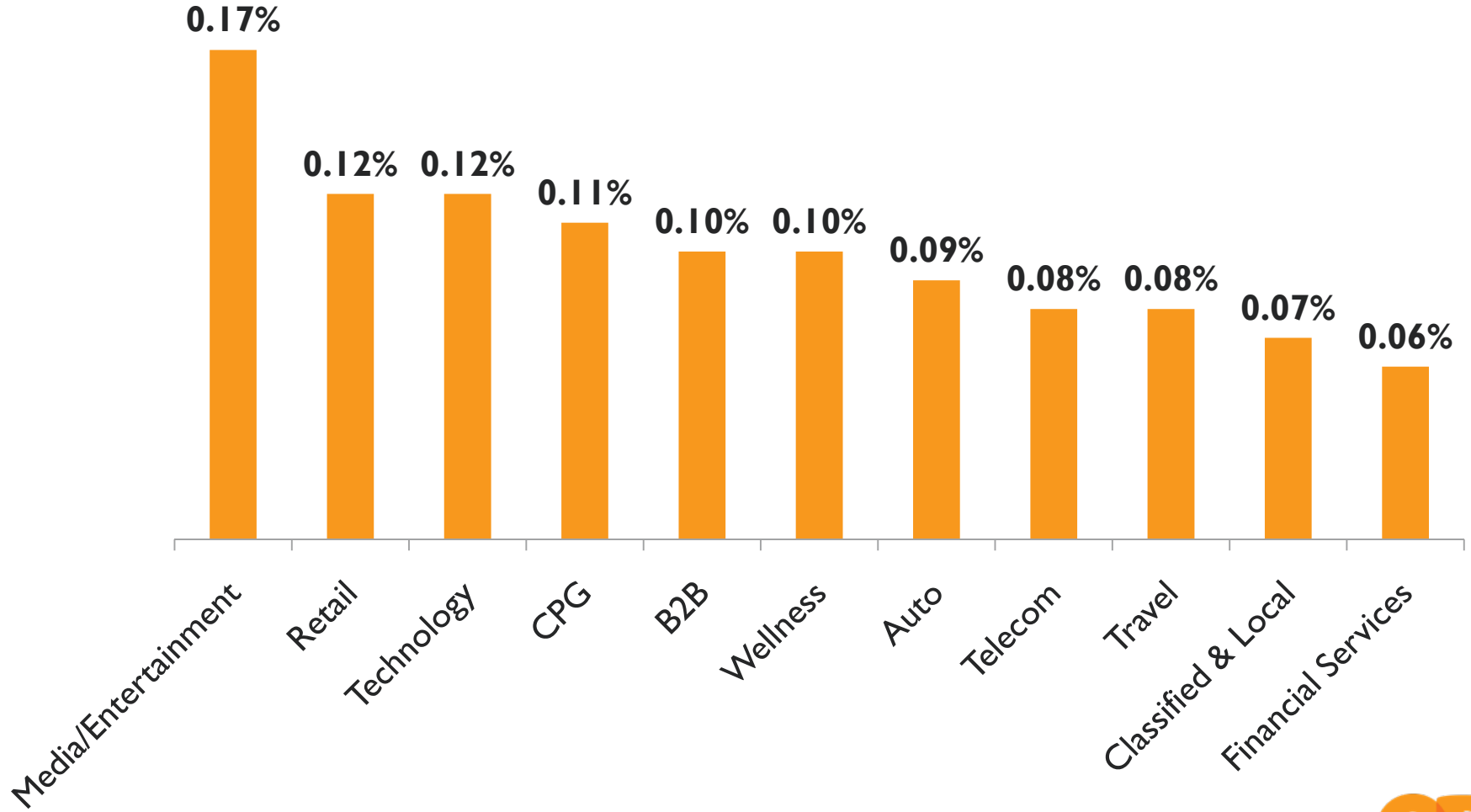
# Research Objectives

- 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



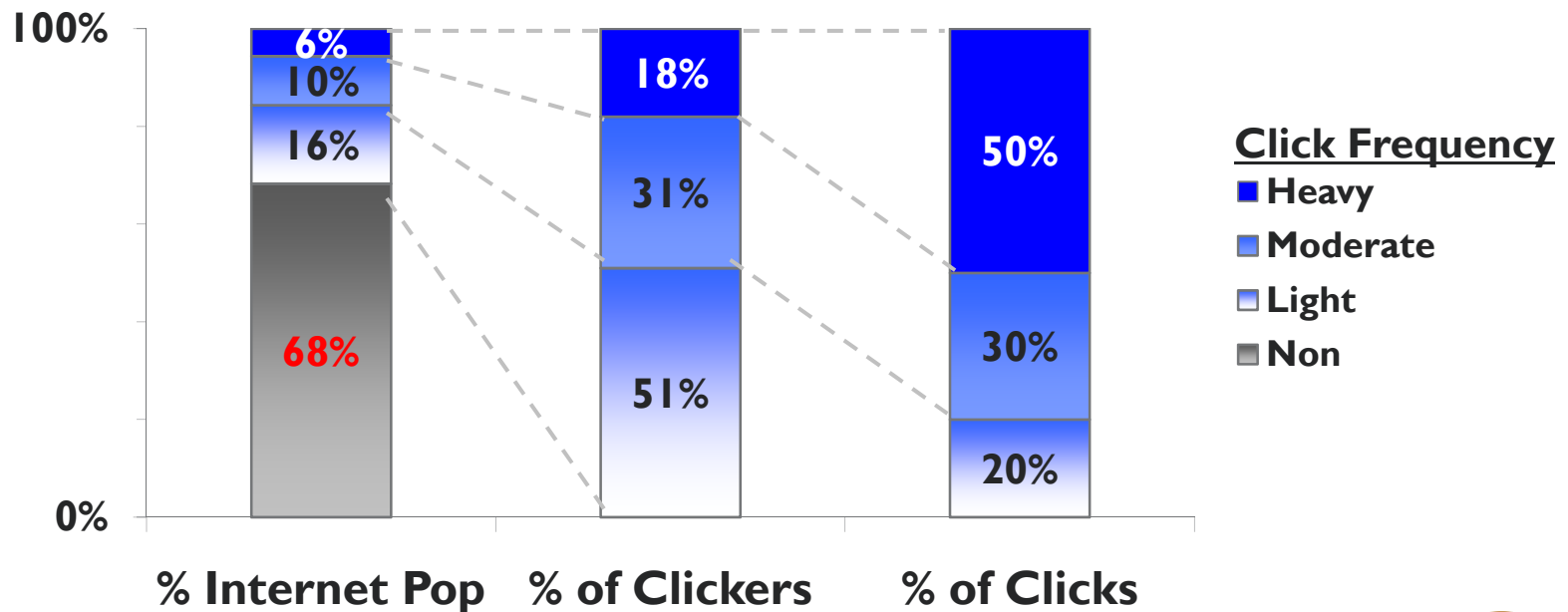
# So Many Ads, So Few Clicks - BusinessWeek

## 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





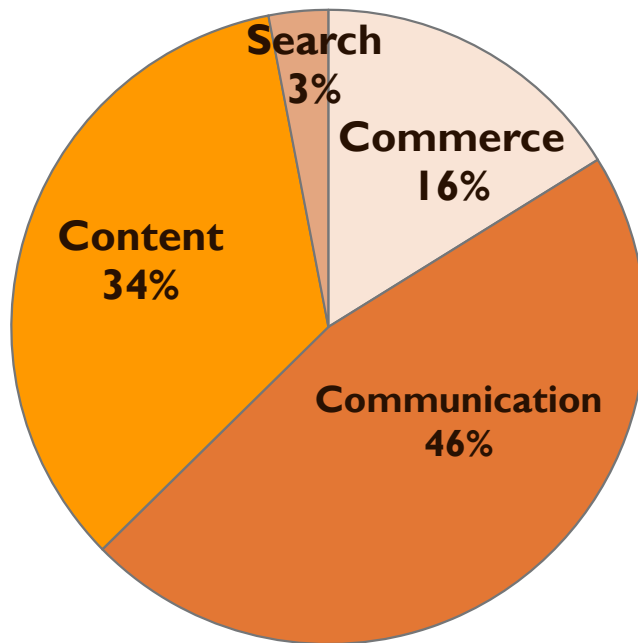
# If Not the Click, Then What? - Ad Age

- *[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

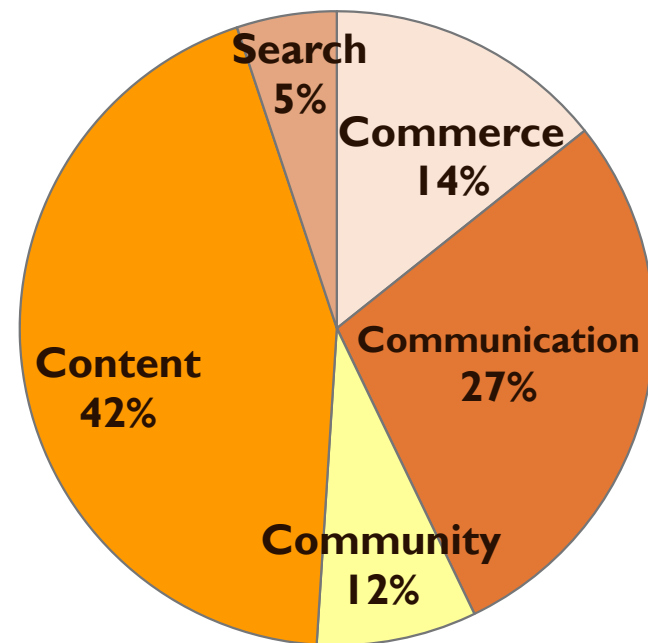
# How Consumers Spend Time Online Has Changed Greatly the Last 5 Years

- 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**



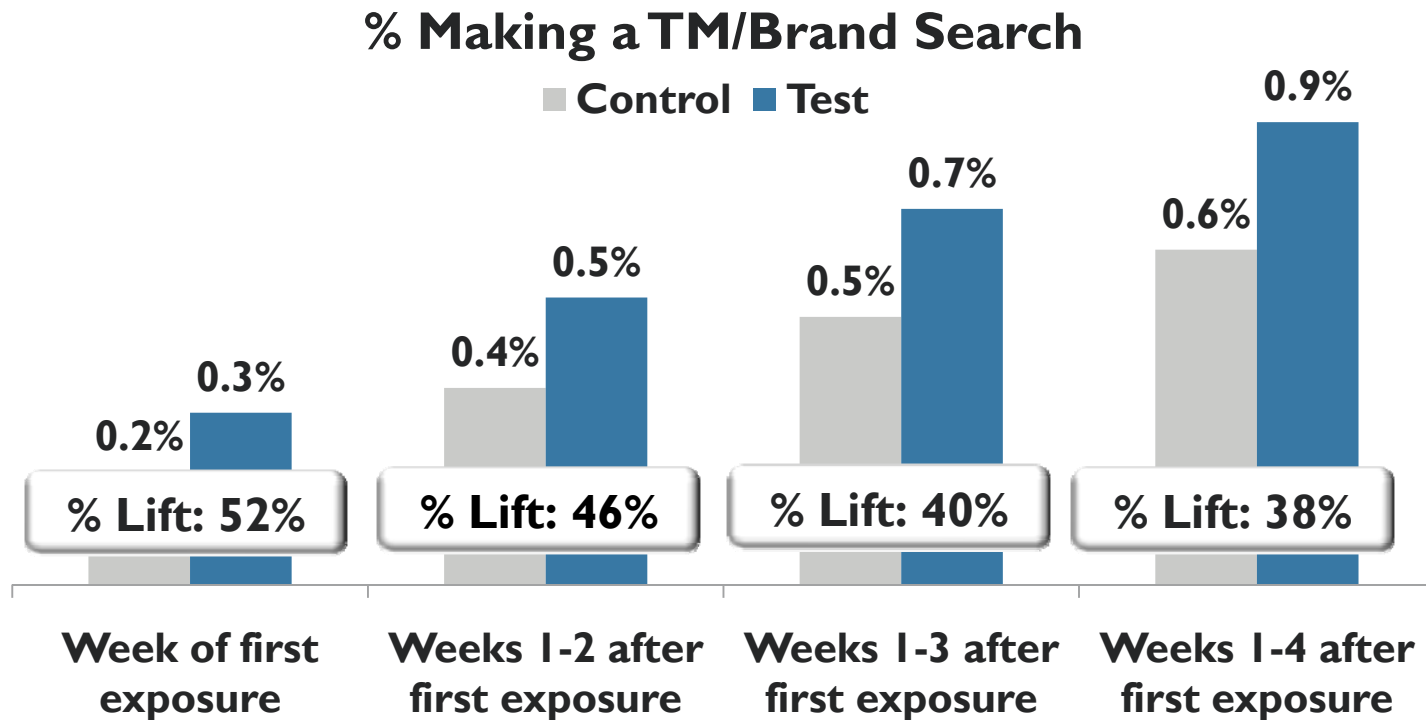
**Q1 2009**



# Display Impacts Search 4 Weeks After Exposure

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

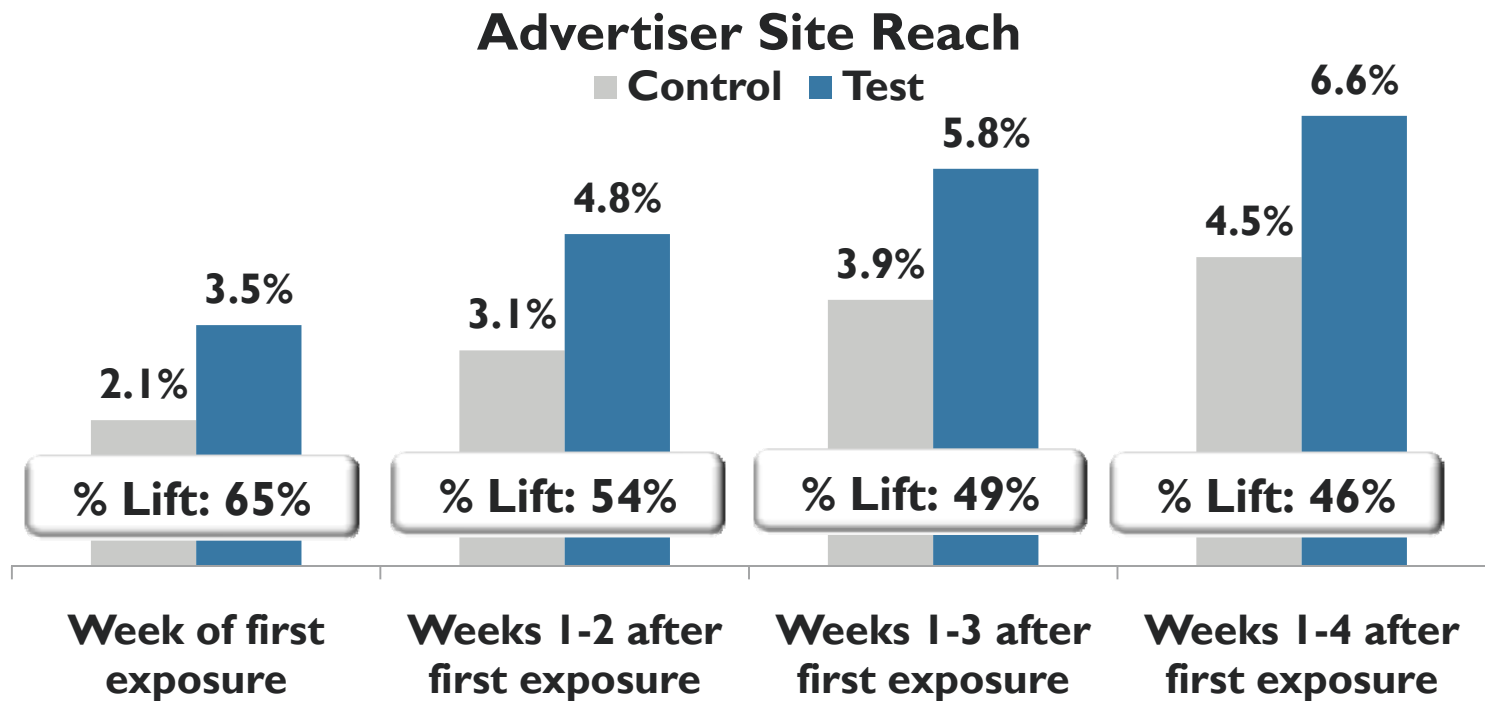
- This dynamic is important because of the synergy between display ads and search, and because a Trademark or a Brand search is a significant indicator of purchase intent



# Display Ads Also Drive Traffic to Advertisers Over Time

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

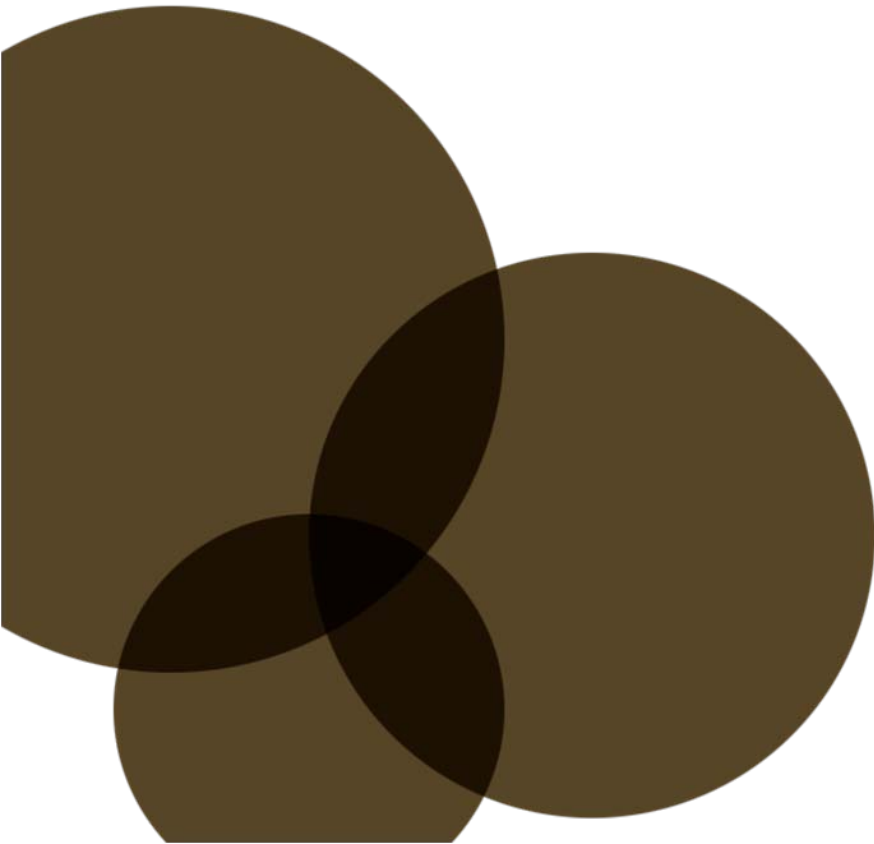
- Display advertising's ability to drive traffic is persistent
- These significant lifts would be overlooked by only considering immediate actions (e.g., a click)







## 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



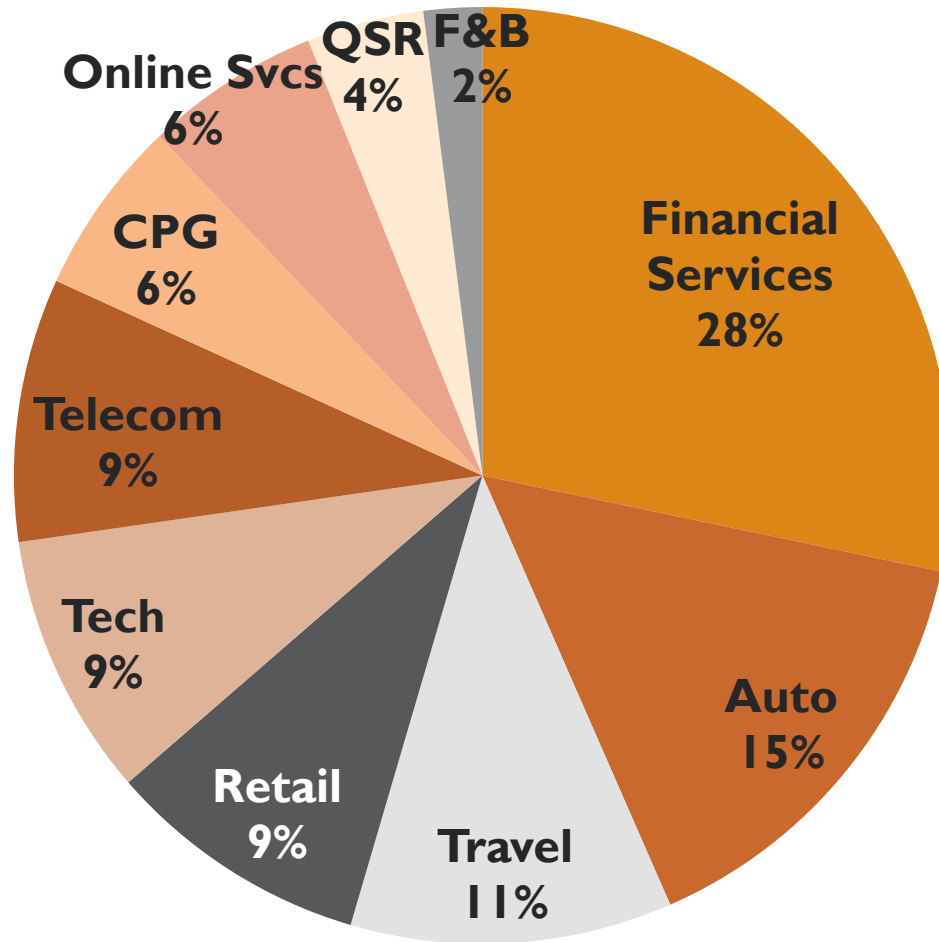


# 80 Ad Campaigns for 53 Brands Tracked Across 200 of the Most Trafficked Sites

- 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

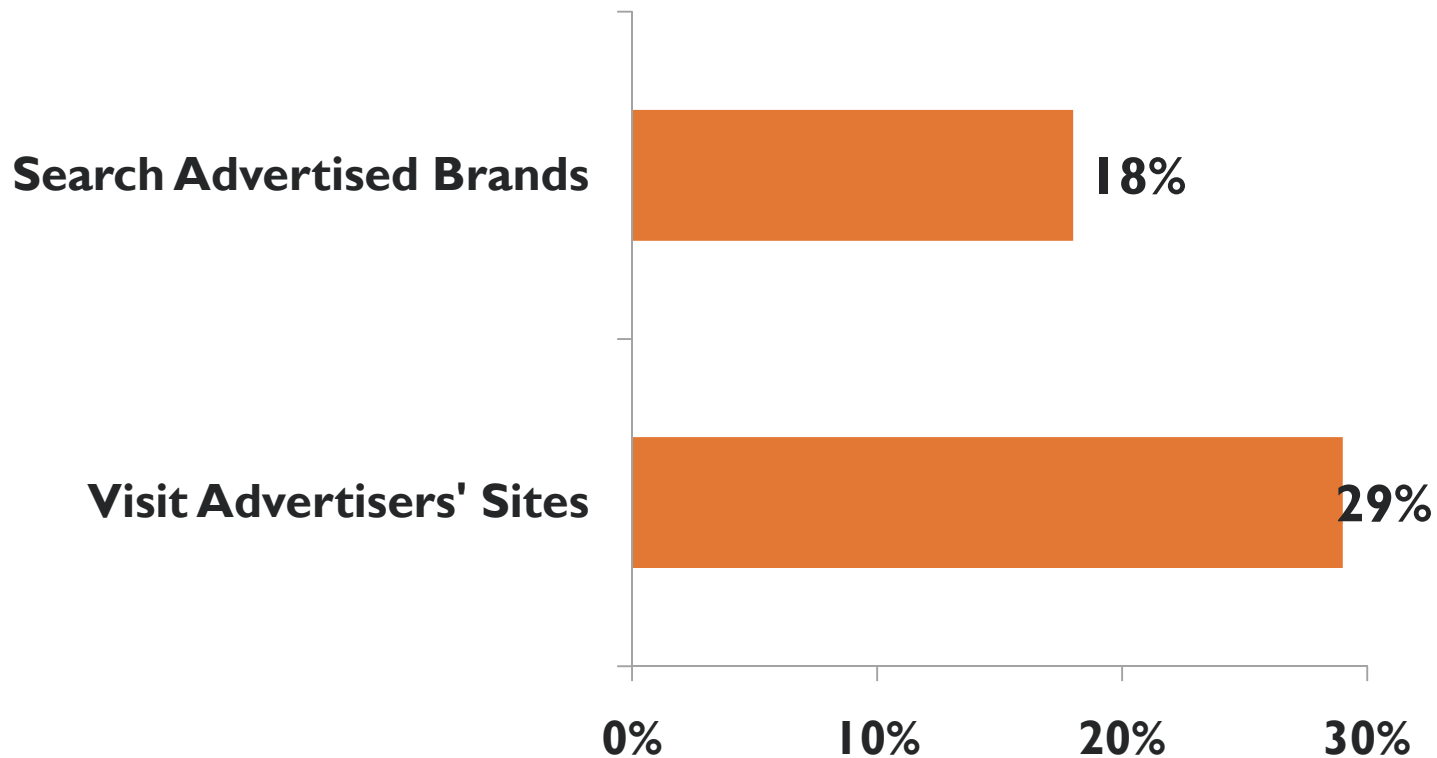
## Brands by Industry



# 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



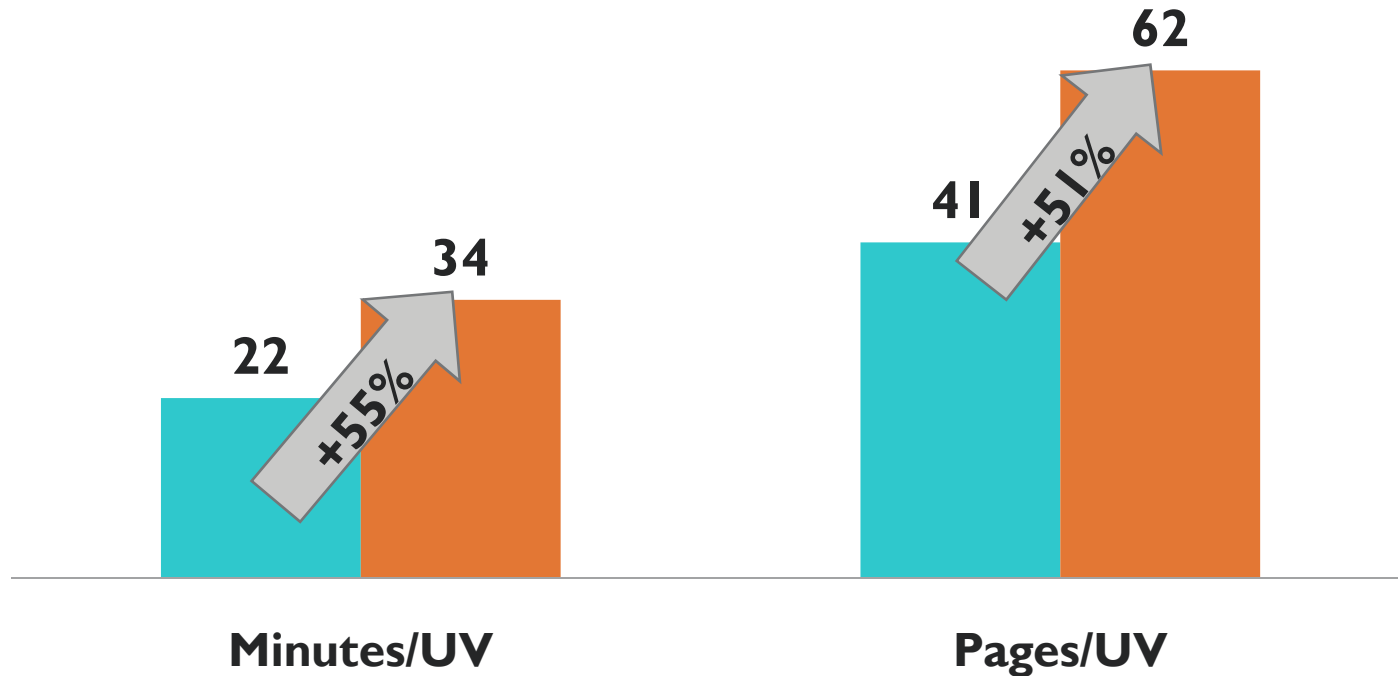
Base: 86.2MM Exposed to at least one of top 20 advertisers  
Source: comScore Marketing Solutions, 02/09

# 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

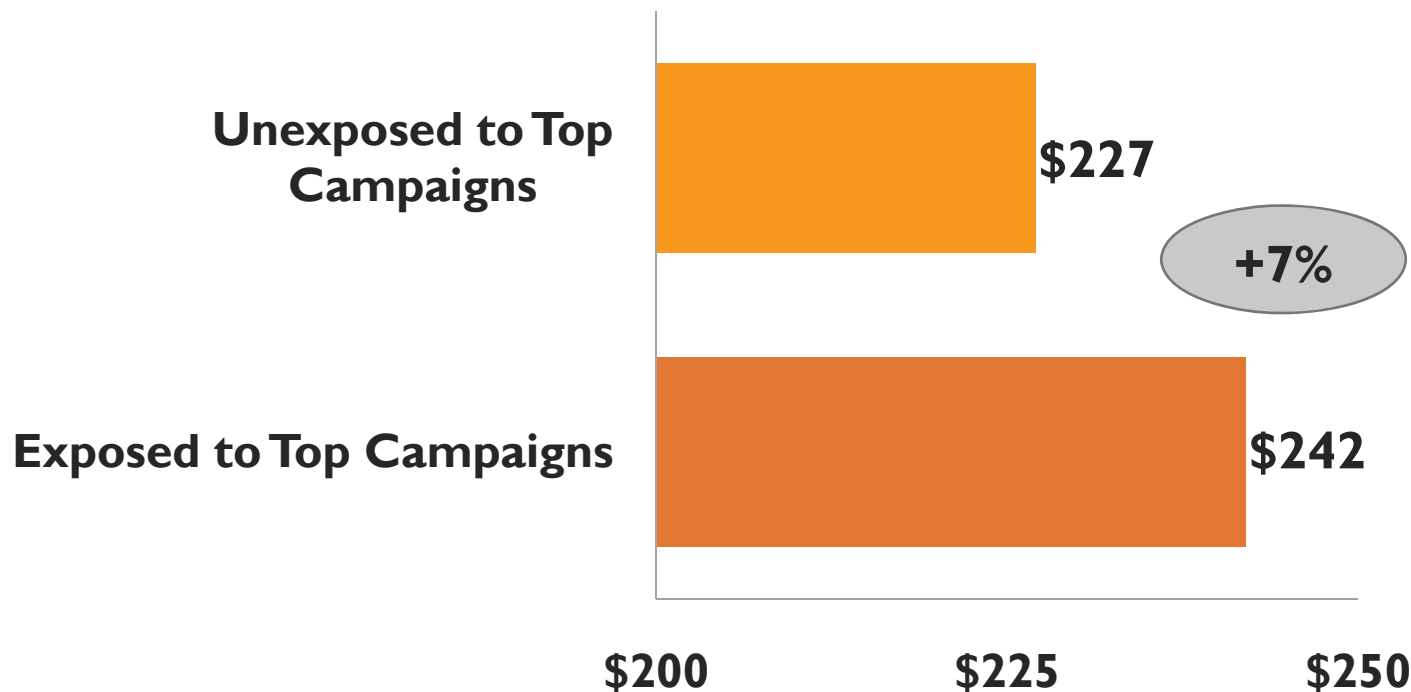




# Greater Spending for Advertiser Site Visitors Exposed to Biggest Campaigns

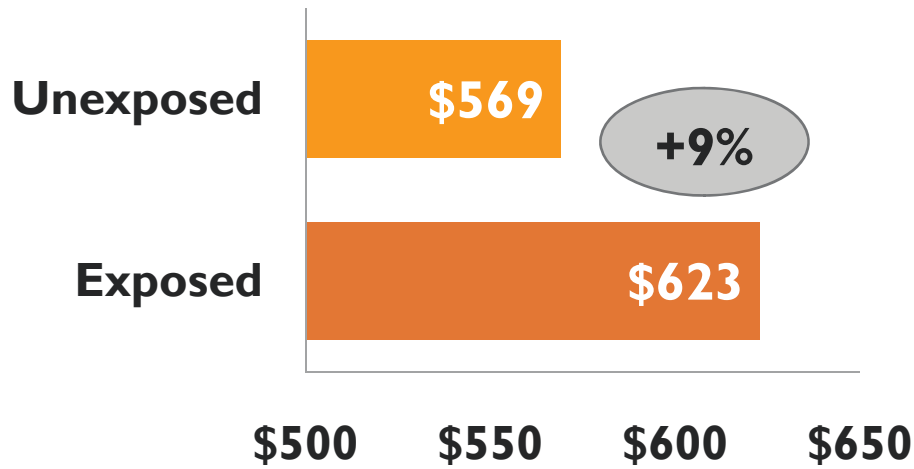
- These figures represent the average e-commerce spending in February for visitors to the 53 brands' sites – comparing visitors exposed to these brands' January online ad campaigns with those not exposed

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

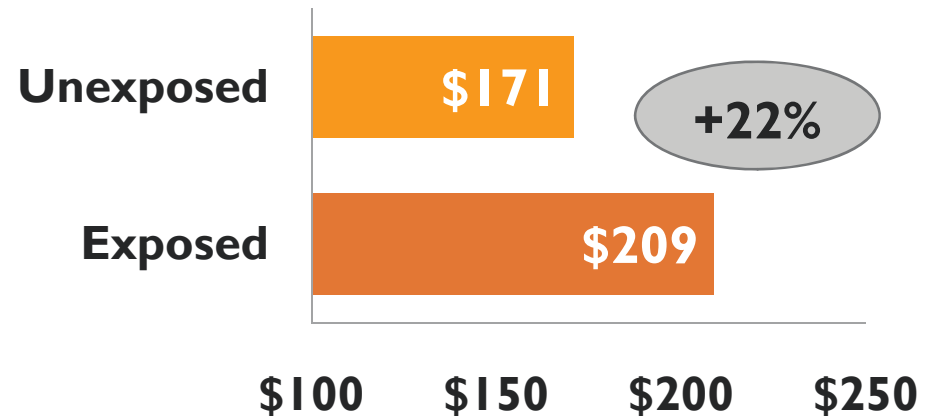


# More E-Commerce Spending by Those Exposed to Related Online Advertising

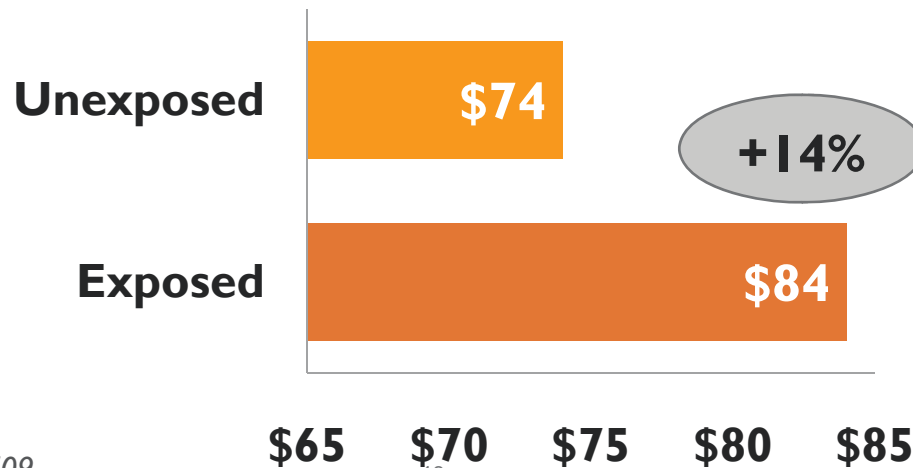
Travel \$/Advertiser Visitor Feb '09



Consumer Electronics \$/Advertiser Visitor Feb '09

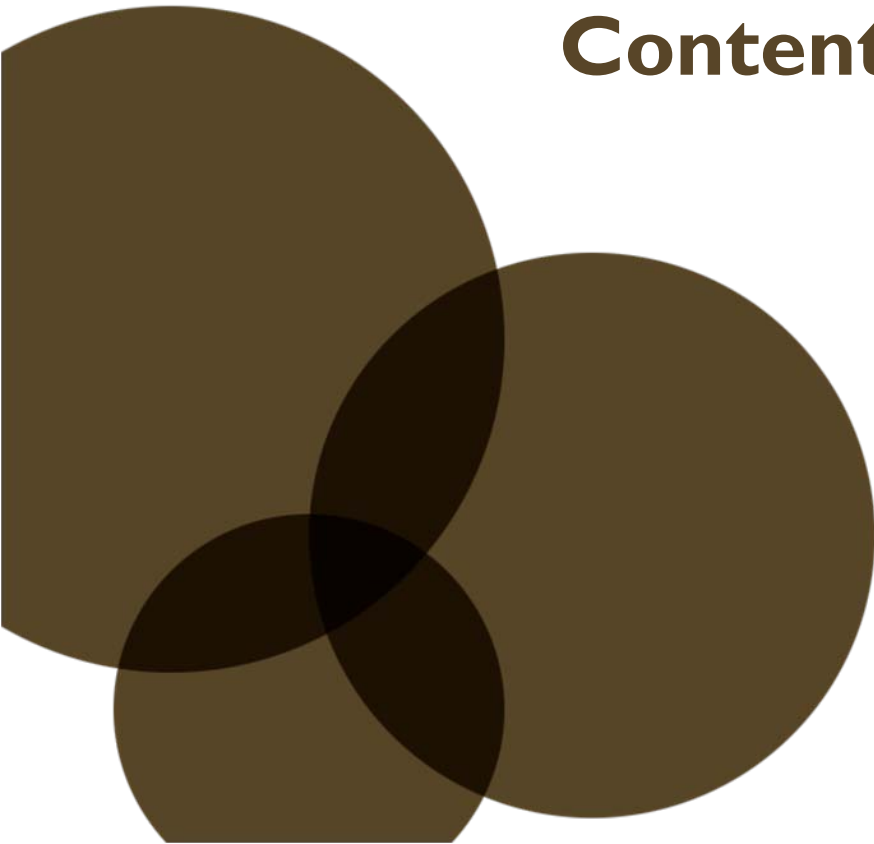


CPG \$/Advertiser Visitor Feb '09



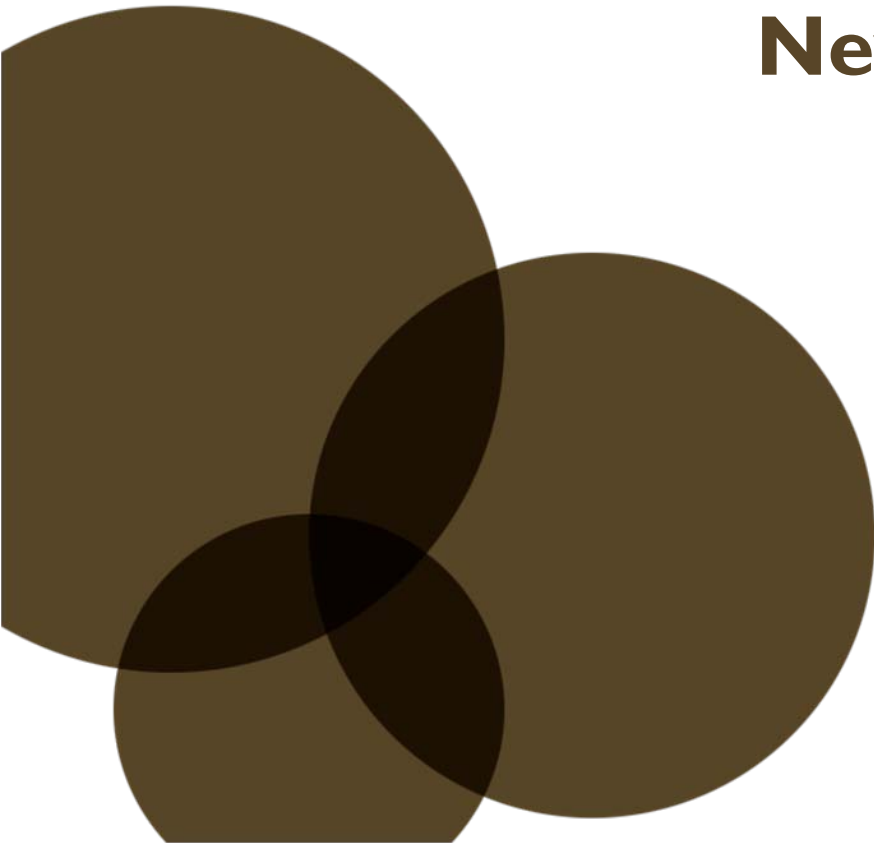


## Content Site Segment Results



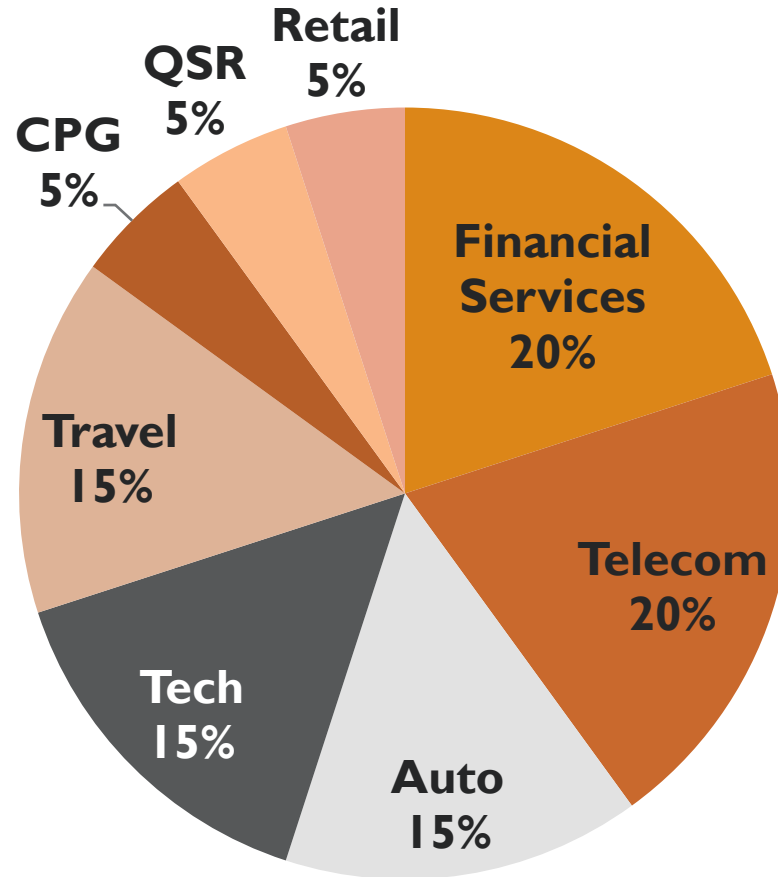


## News & Information



# Top 20 Advertiser Categories

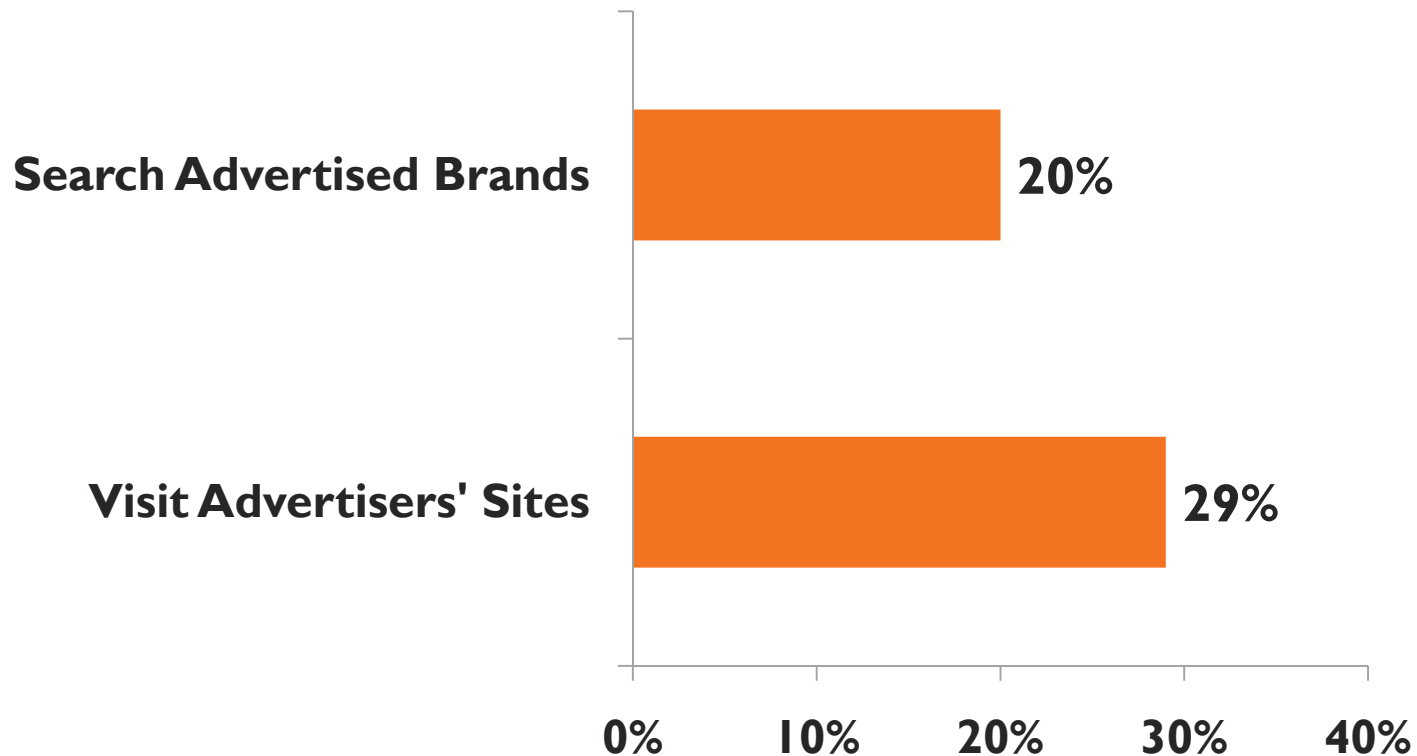
## Top 20 Advertiser Categories: News & Info



# 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

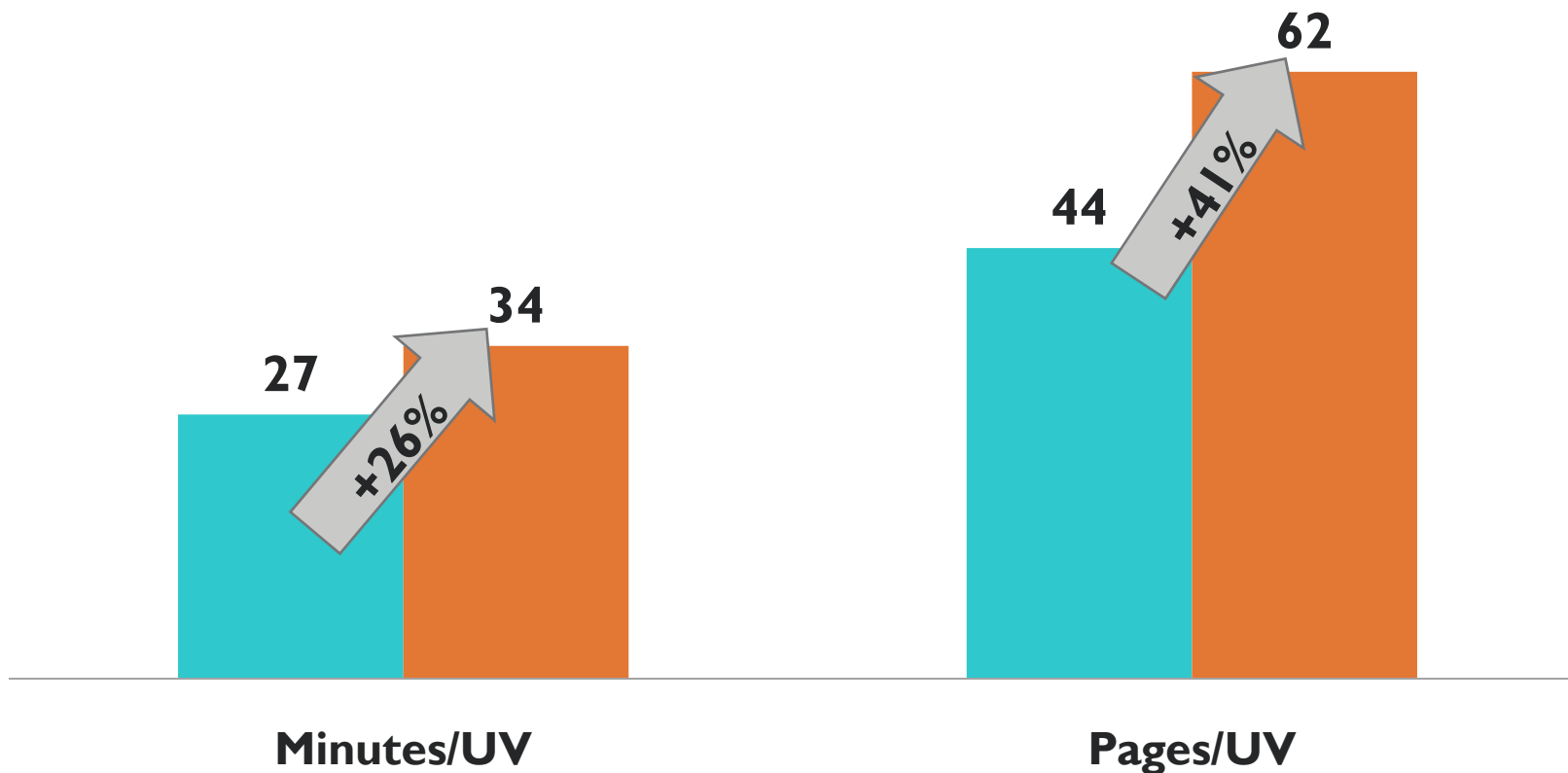
## News UVs Exposed to Top 20 Advertising



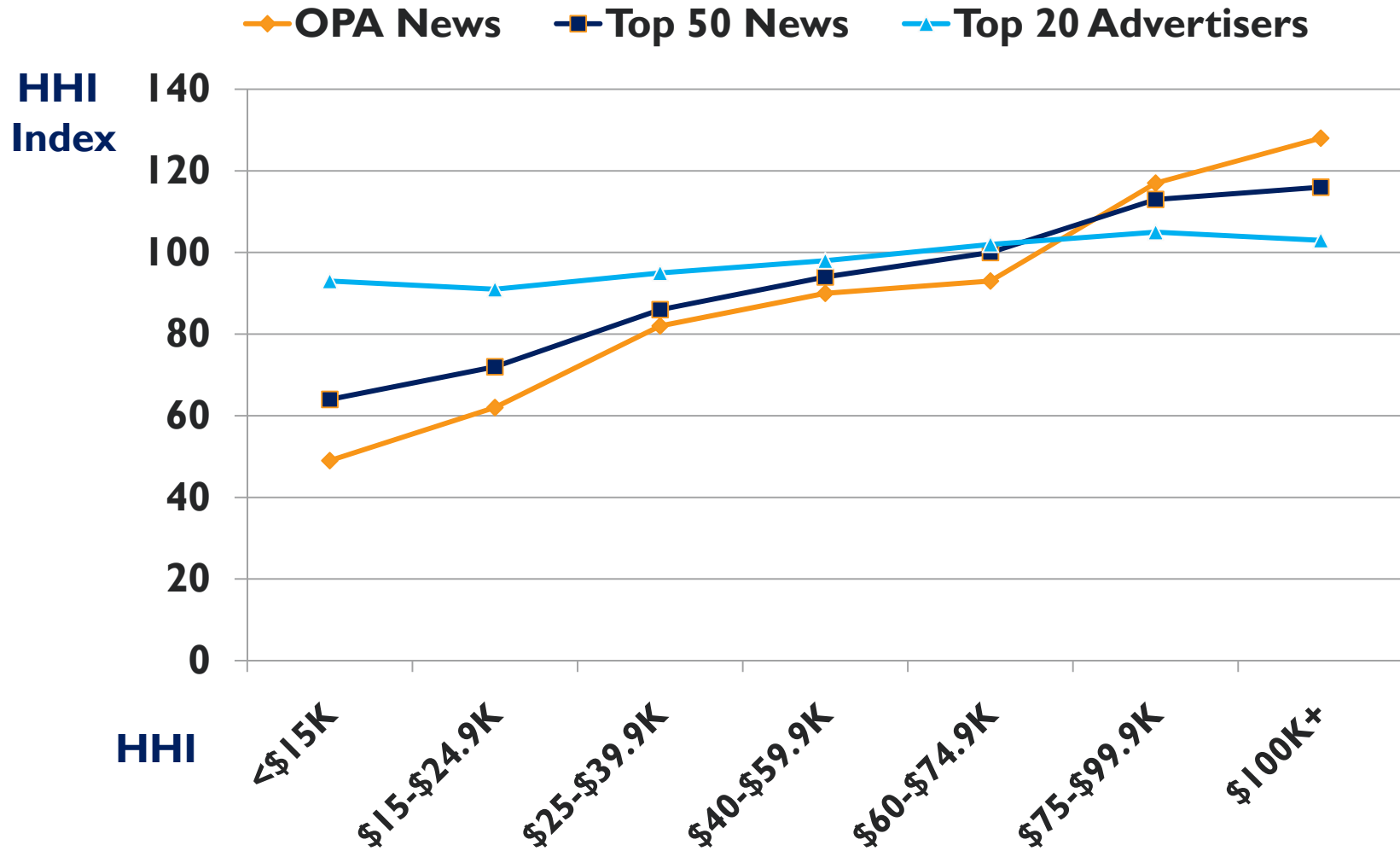
# Exposed Visitors View 40% More Pages on Advertisers' Sites

## Advertiser Site Engagement

■ All UVs to Advertiser Site    ■ Exposed News Site UVs



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

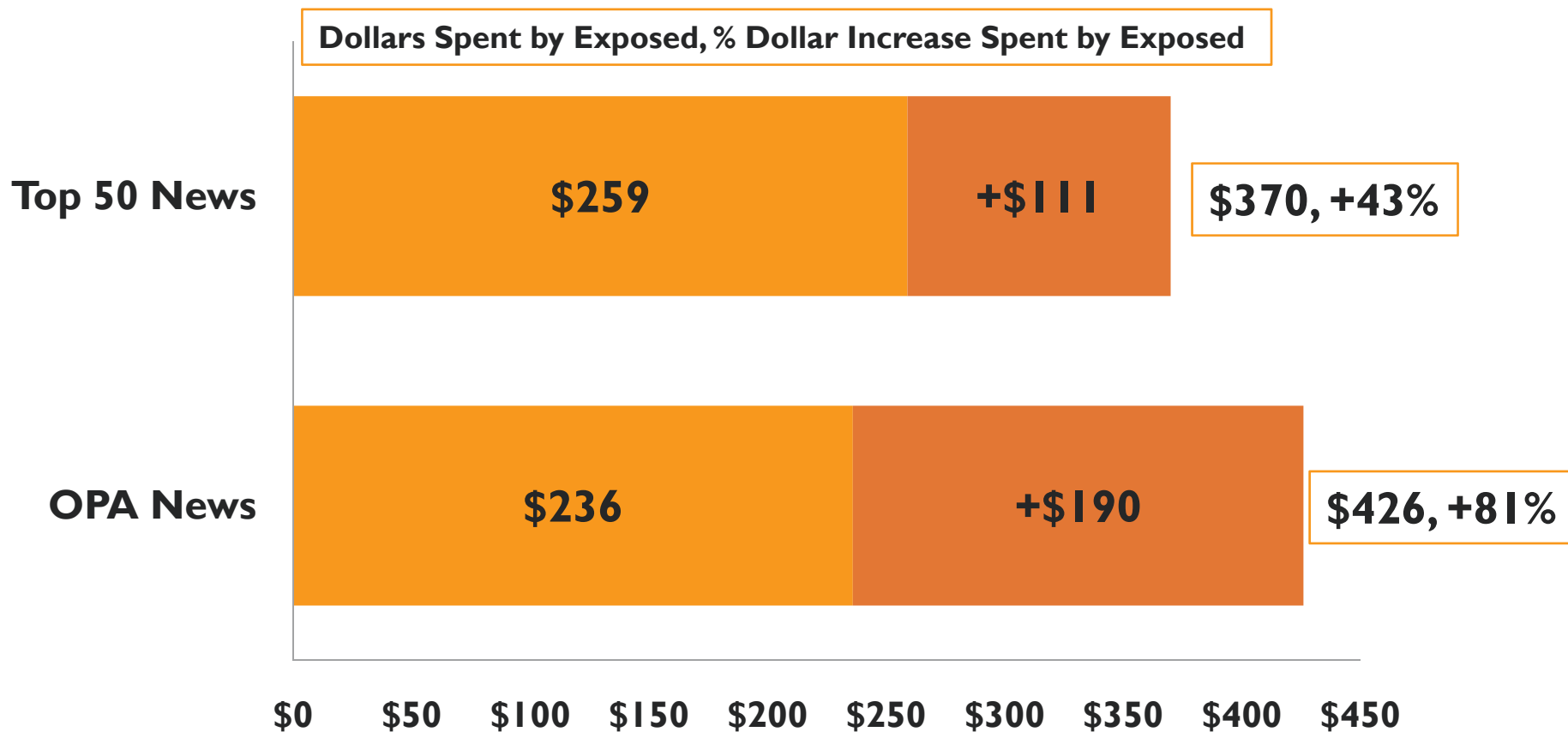




# Much More Spending by the Exposed – Especially Those from OPA News Sites

## Ecommerce \$/News Site Visitor Feb '09

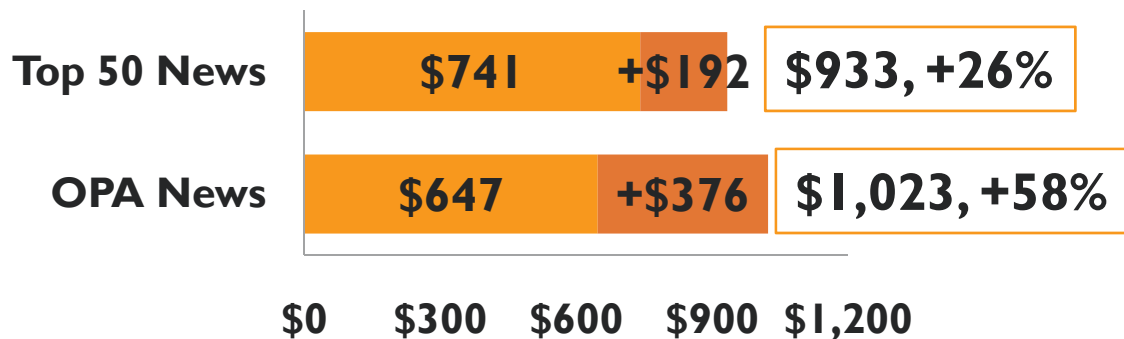
■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



# 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

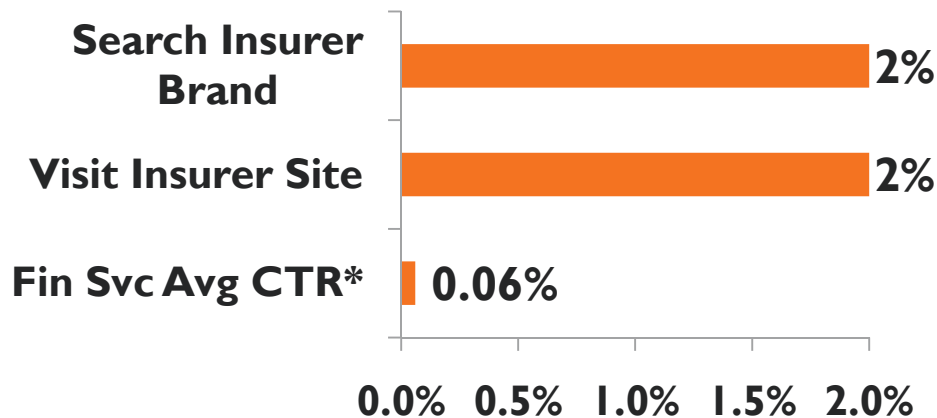
## CPG \$/News Site Visitor Feb '09



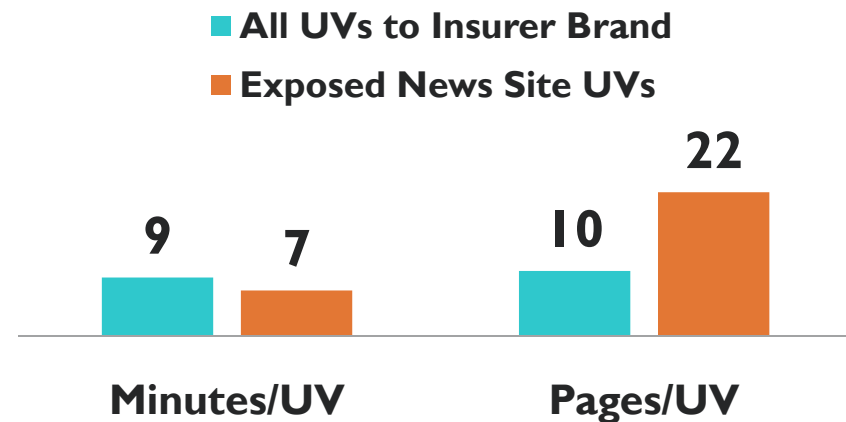
# Results for an Insurance Company

- 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

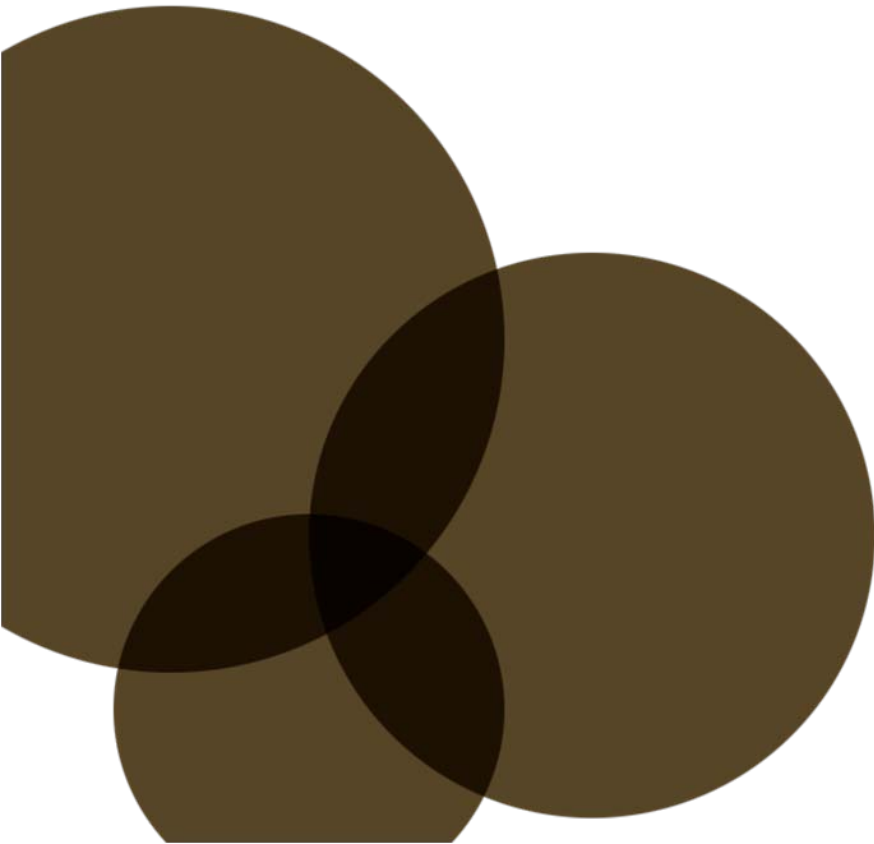


### Engagement with Insurer Brand Feb '09



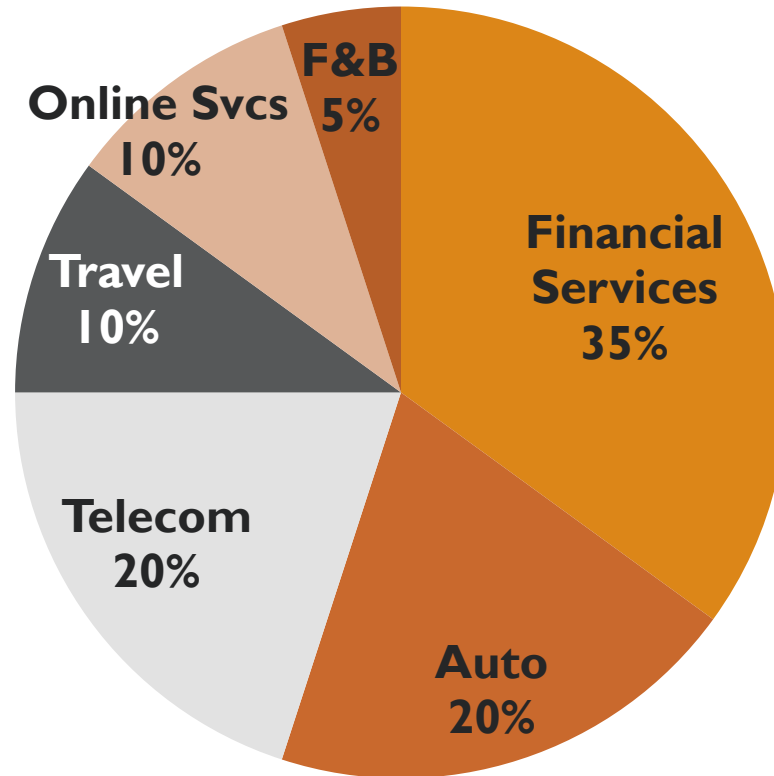


## Sports



# Top 20 Advertiser Categories

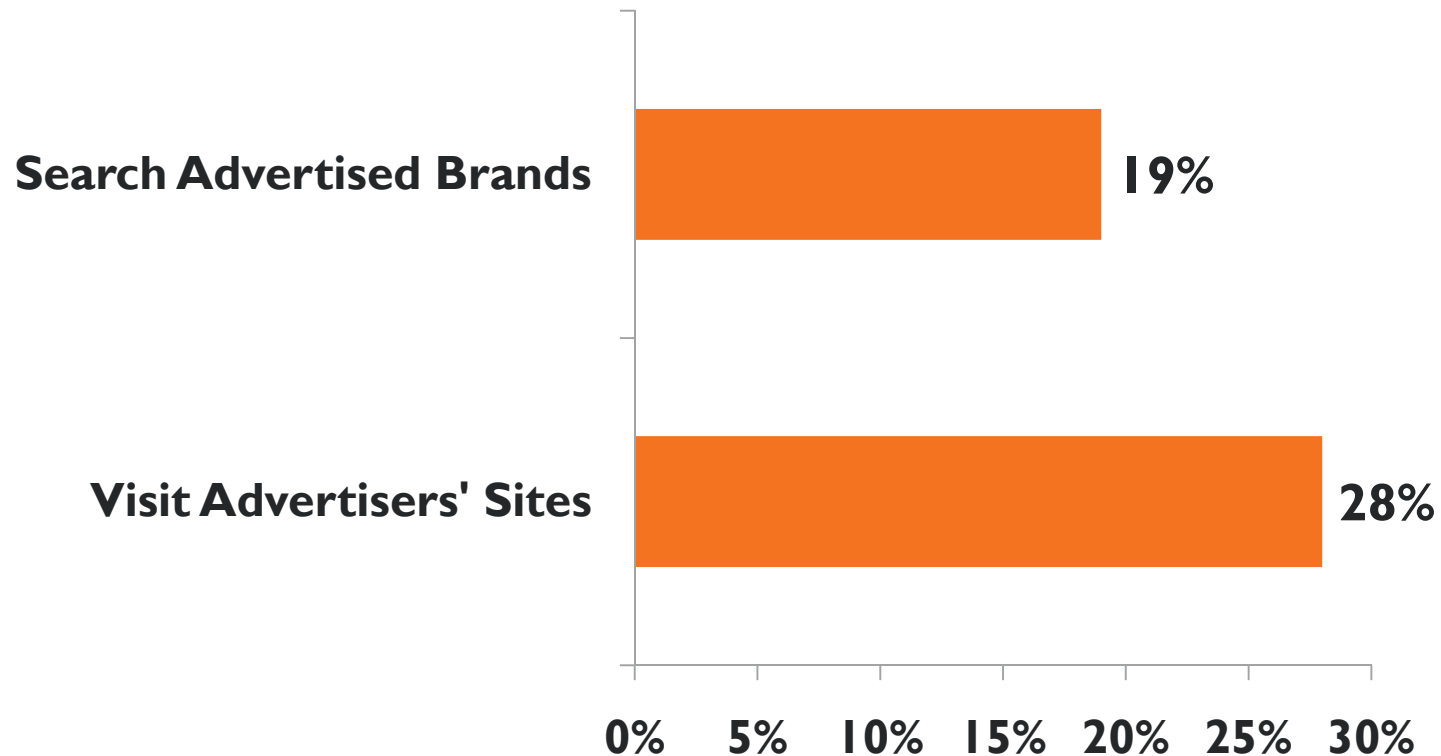
## Top 20 Advertiser Categories: Sports



# 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

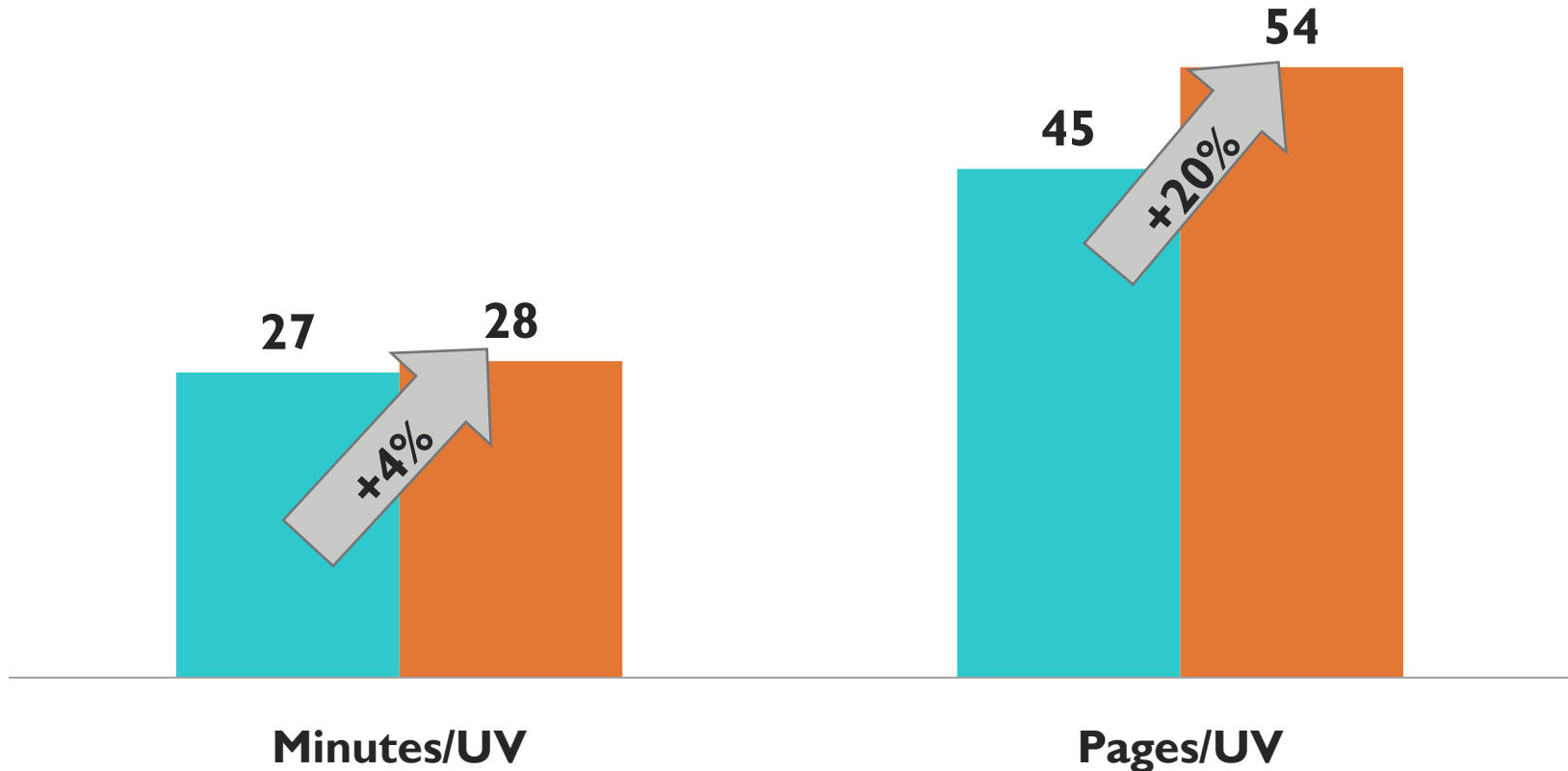


Base: 37.6MM Exposed to at least one of top 20 advertisers  
Source: comScore Marketing Solutions, 02/09

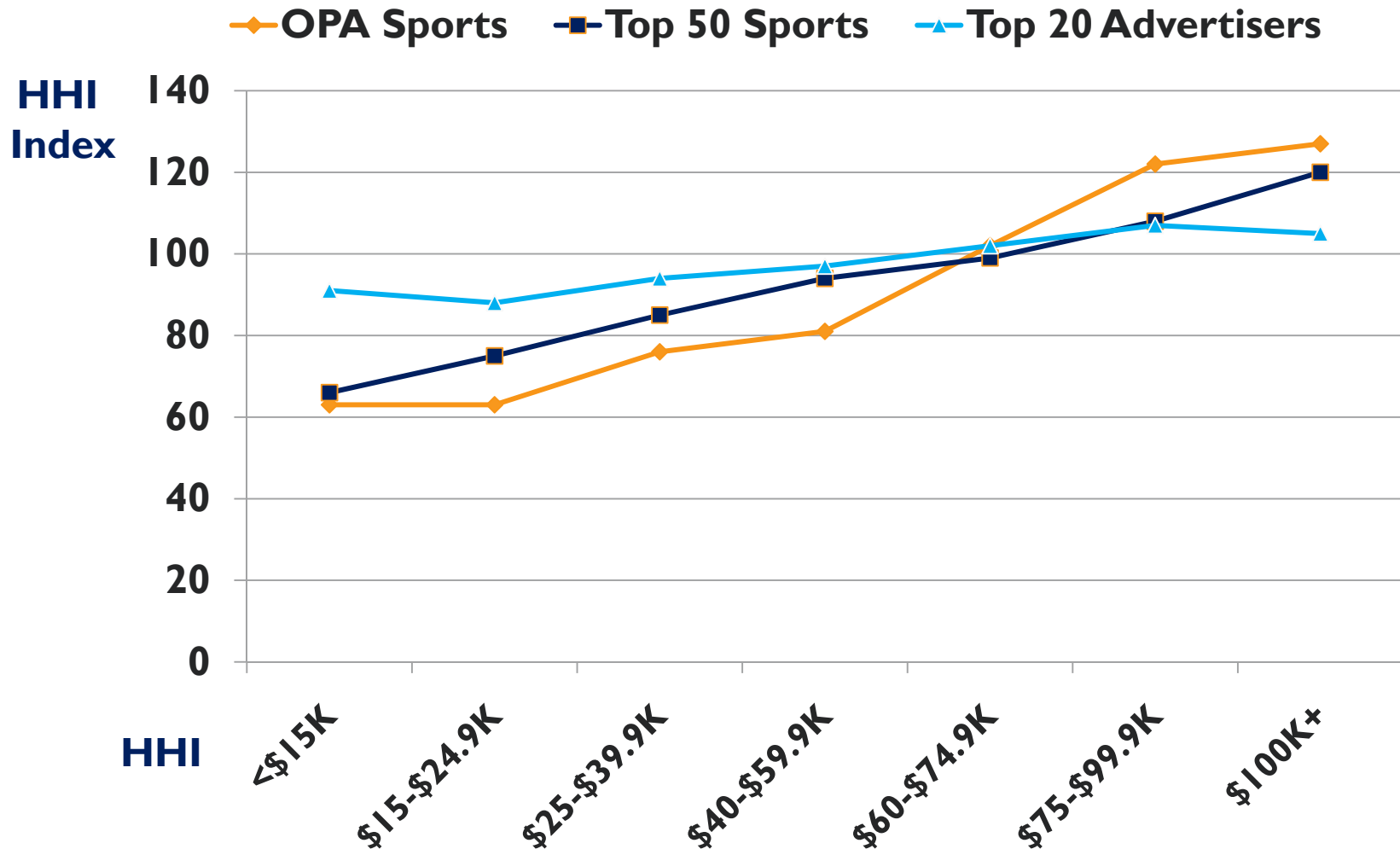
# Ad-Exposed UVs View 20% More Pages of Advertisers' Content

## Advertiser Site Engagement

■ All UVs to Advertiser Site    ■ Exposed Sports Site UVs



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

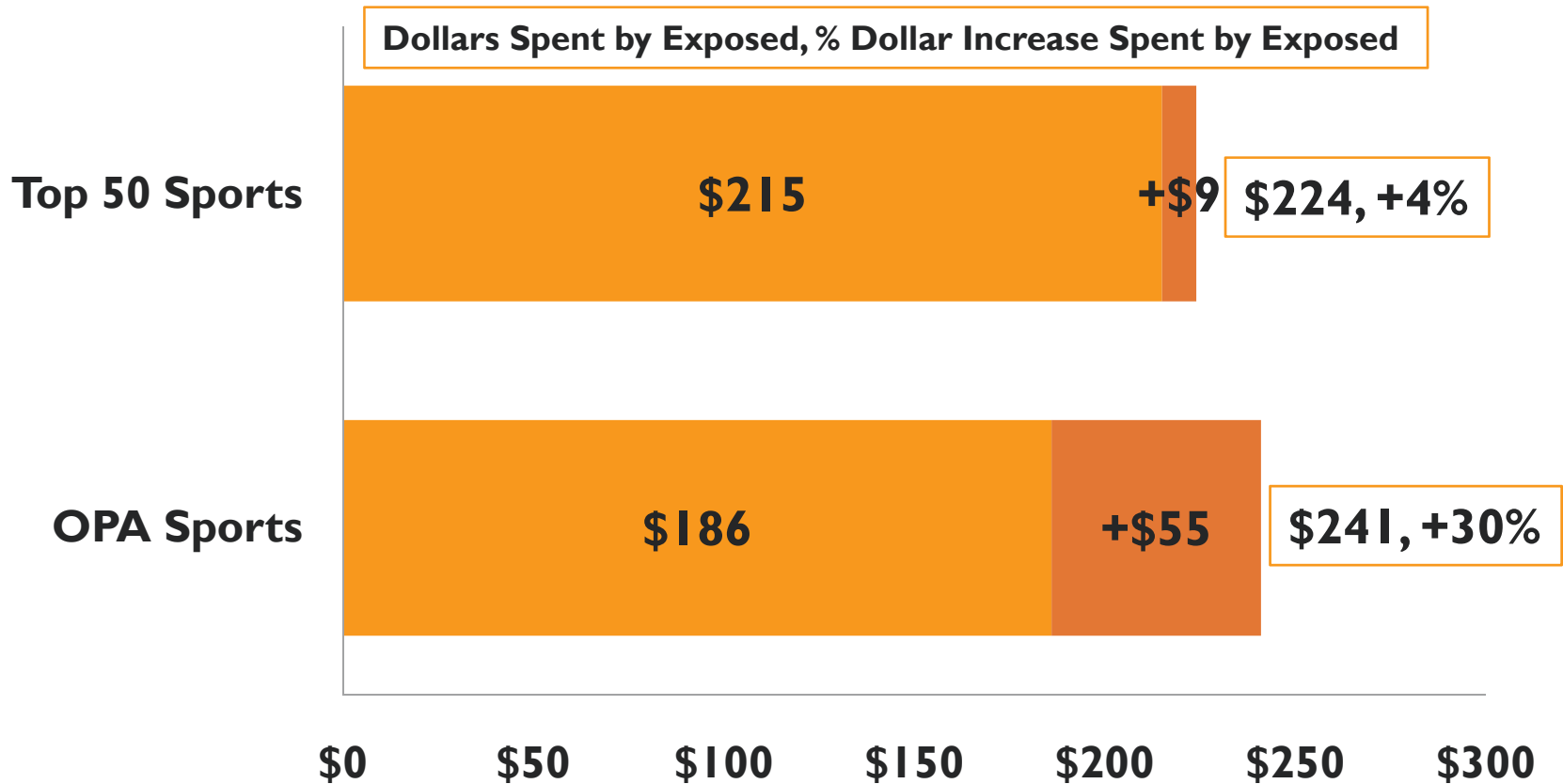




# Significantly Greater Spending by UVs Exposed to Ads on OPA Sports Sites

## Ecommerce \$/Sports Site Visitor Feb '09

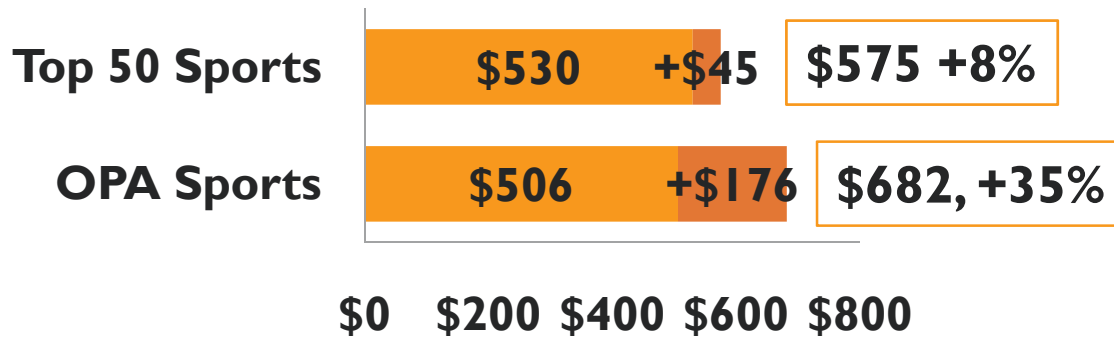
■ Dollars Spent by Unexposed ■ Additional Dollars Spent by Exposed



# 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

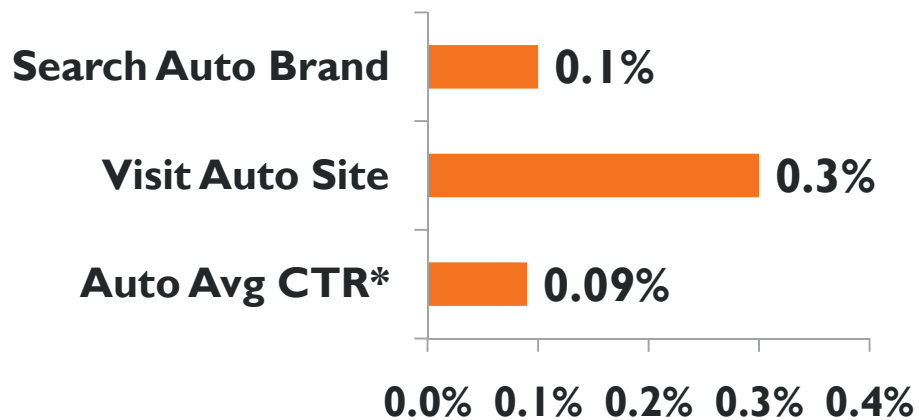
## Telecom \$/Sports Site Visitor Feb '09



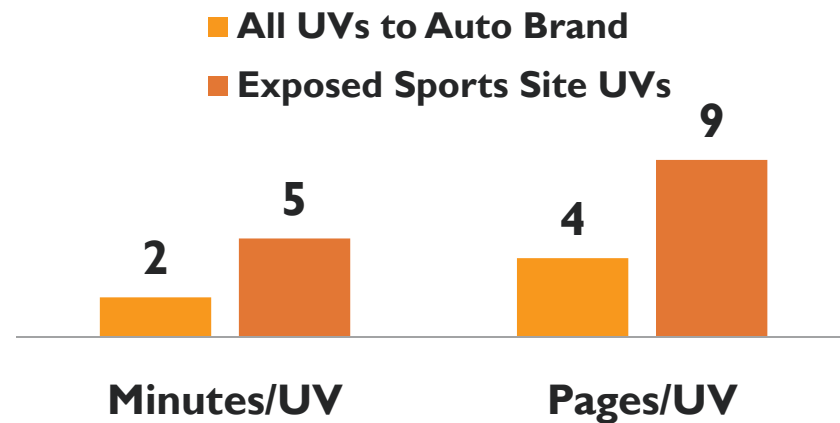
# Results for an Automaker

- 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

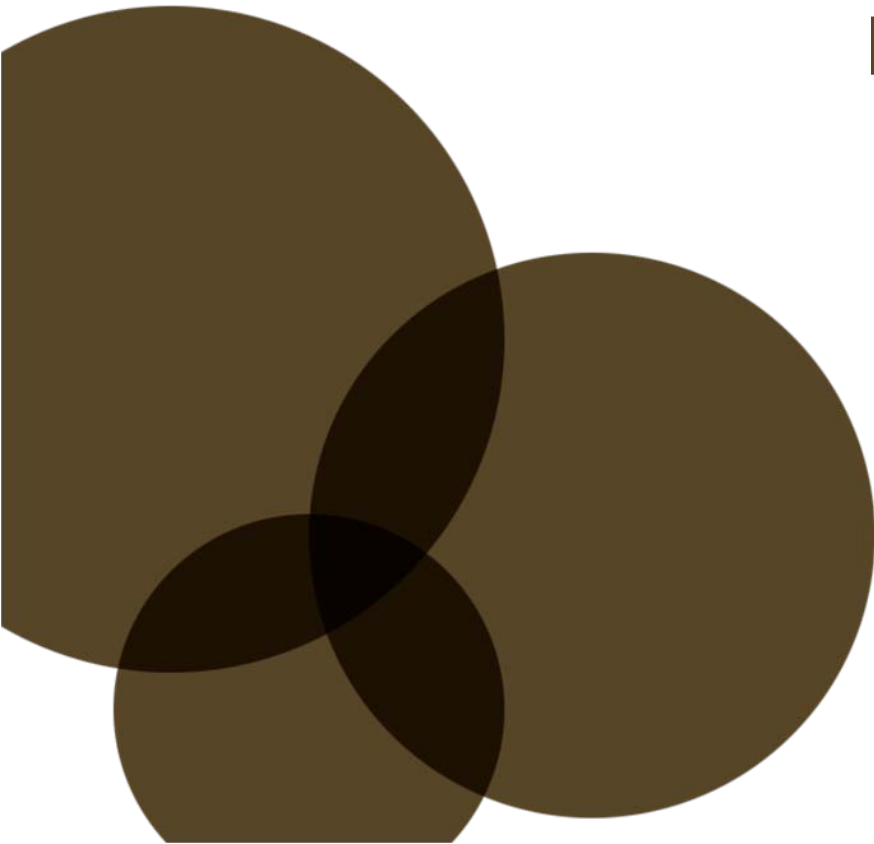


### Engagement with Auto Brand Feb '09



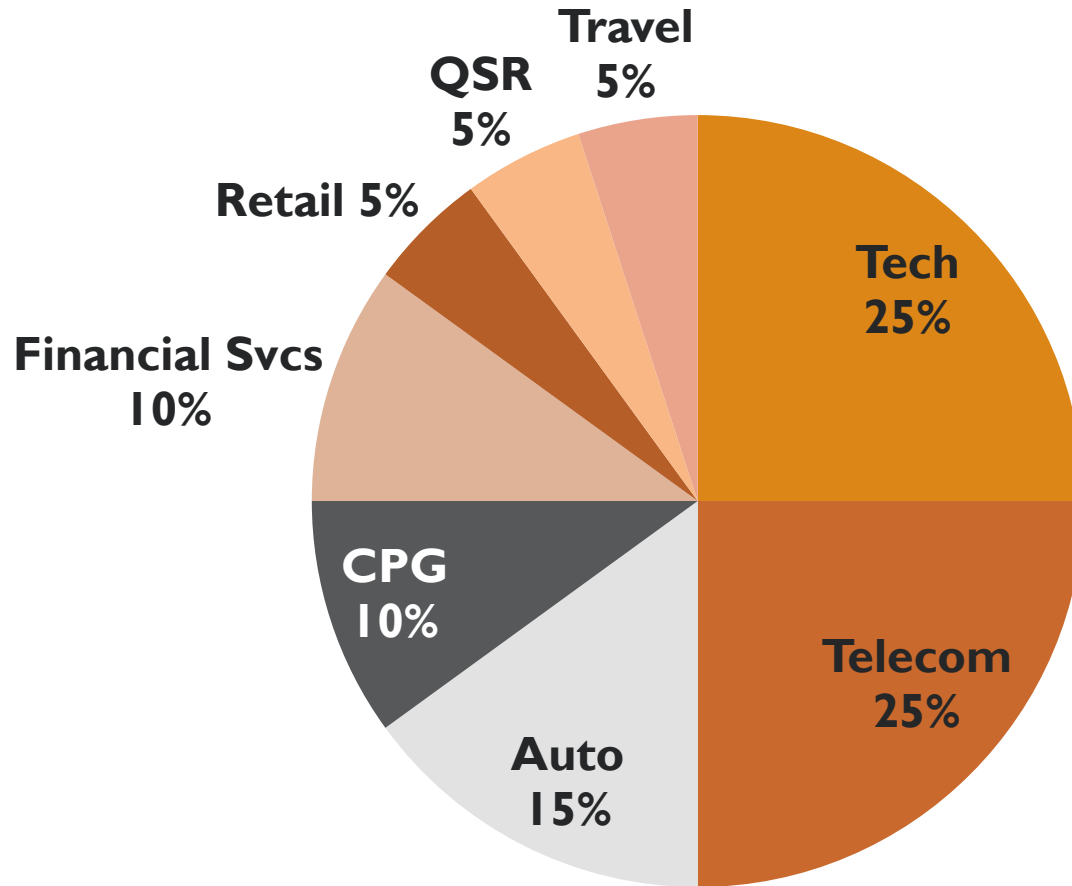


## Entertainment



# Top 20 Advertiser Categories

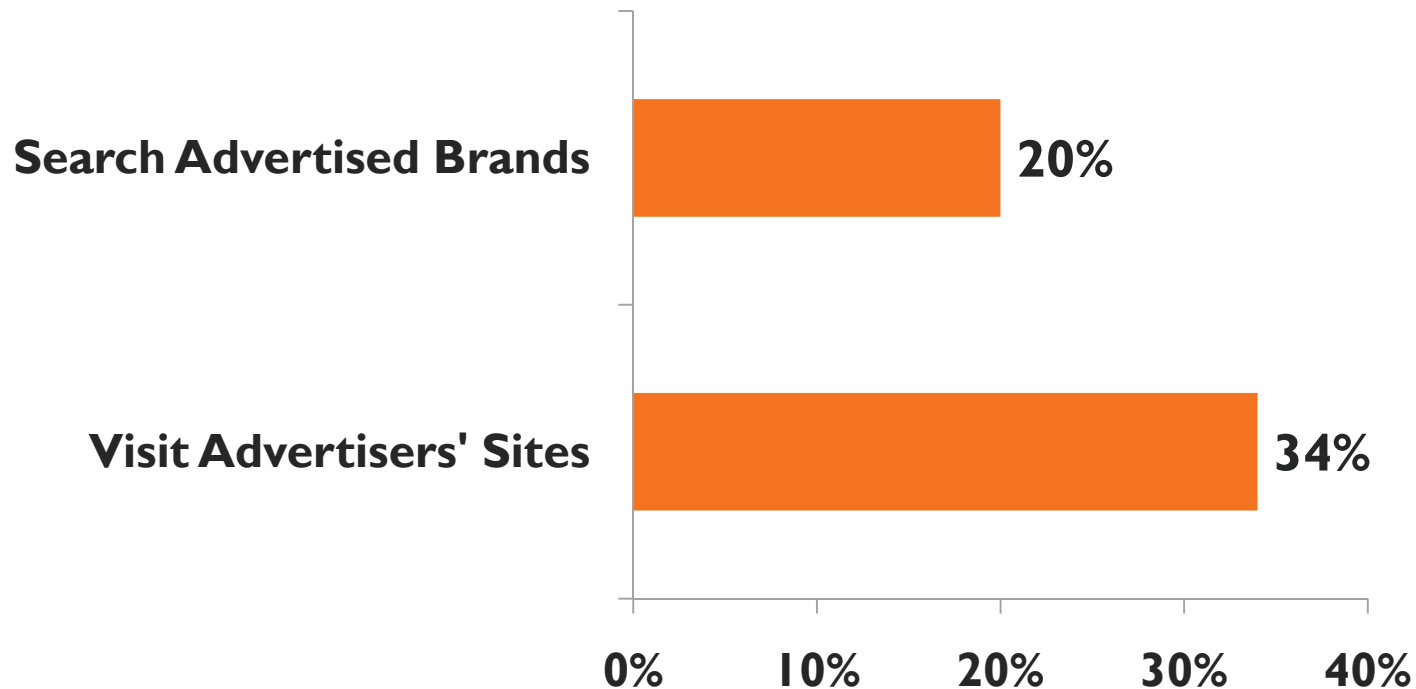
## Top 20 Advertiser Categories: Entertainment



# 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

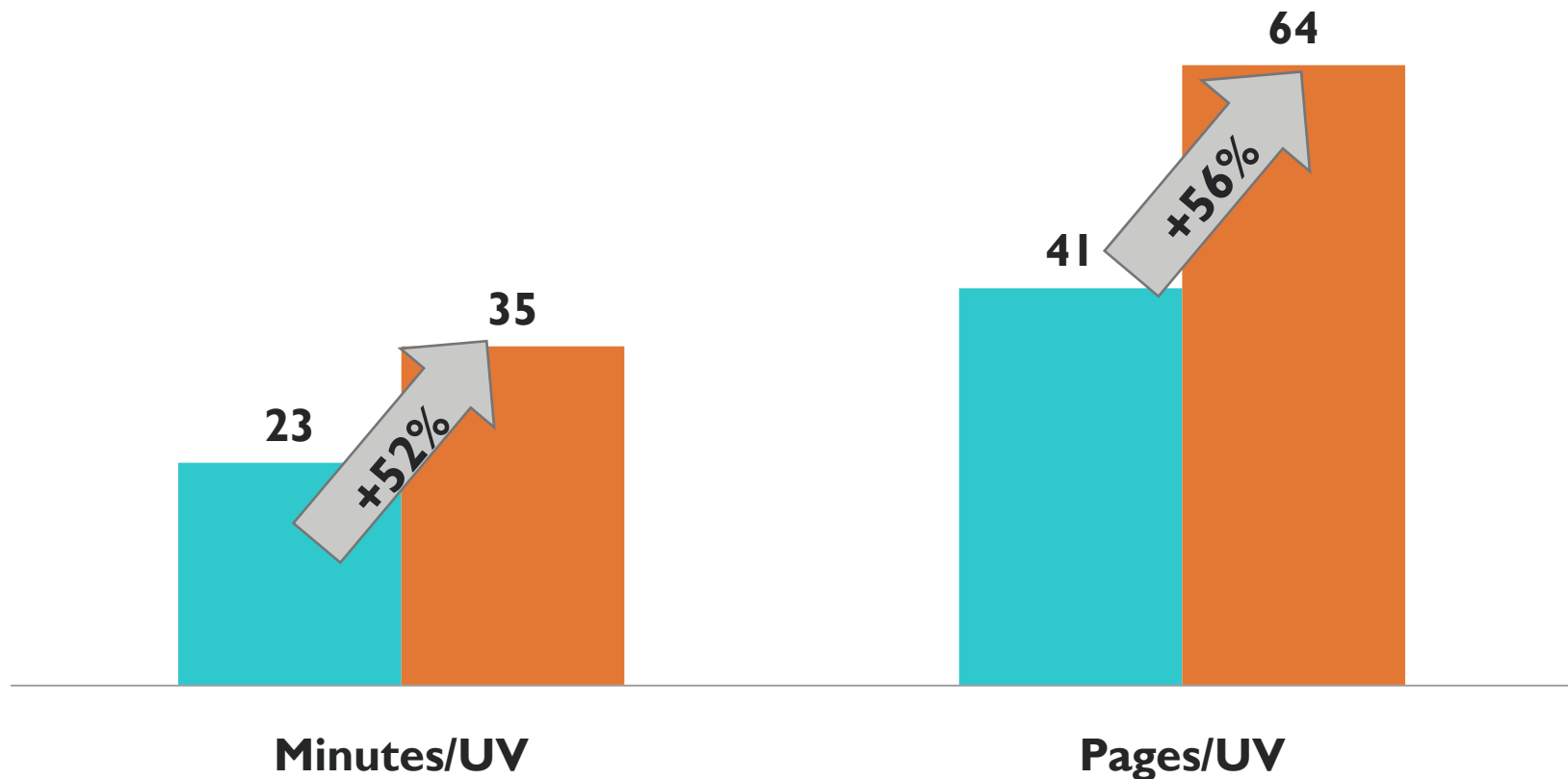
## Entertainment UVs Exposed to Top 20 Advertising



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

## Advertiser Site Engagement

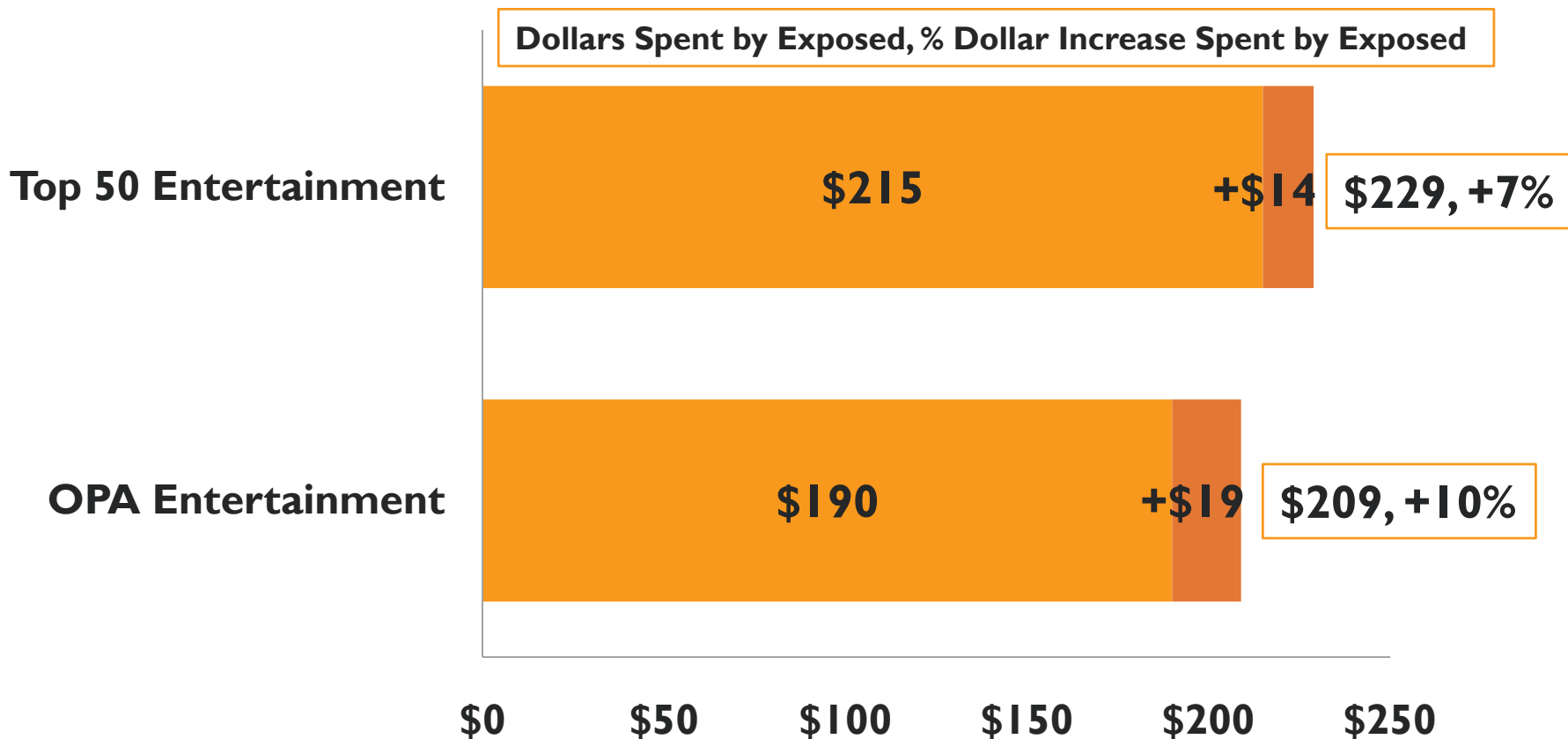
■ All UVs to Advertiser Site ■ Exposed Entertainment Site UVs



# 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

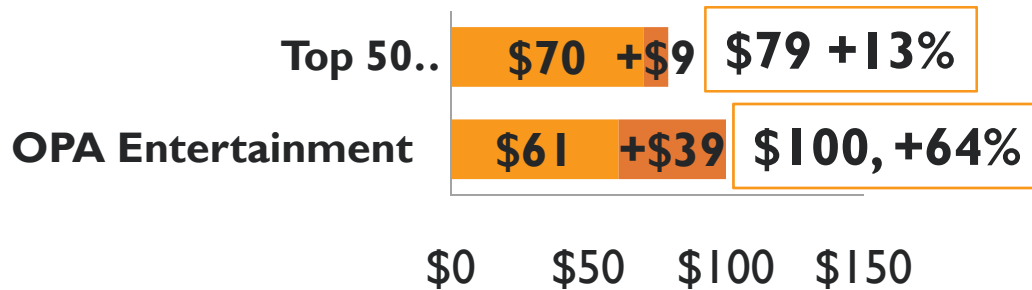




# Greater CPG and Telecom Spending by Those Exposed to Ads on OPA Entertainment Sites

## 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

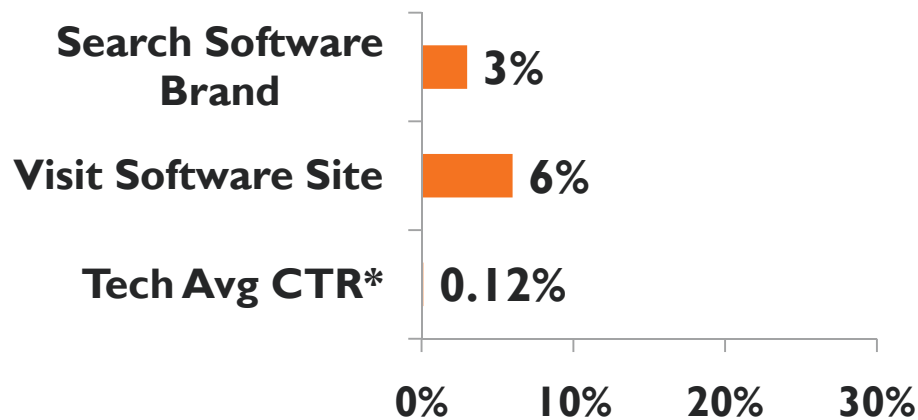
## Telecom \$/Entertainment Site Visitor Feb '09



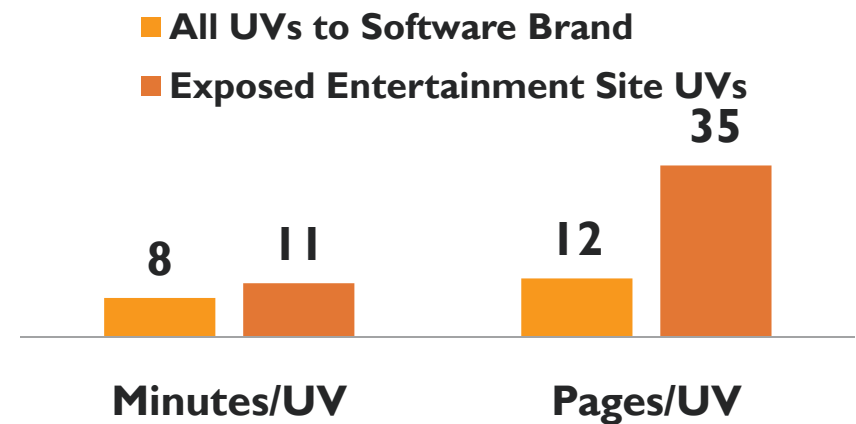
# Results for a Software Company

- 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

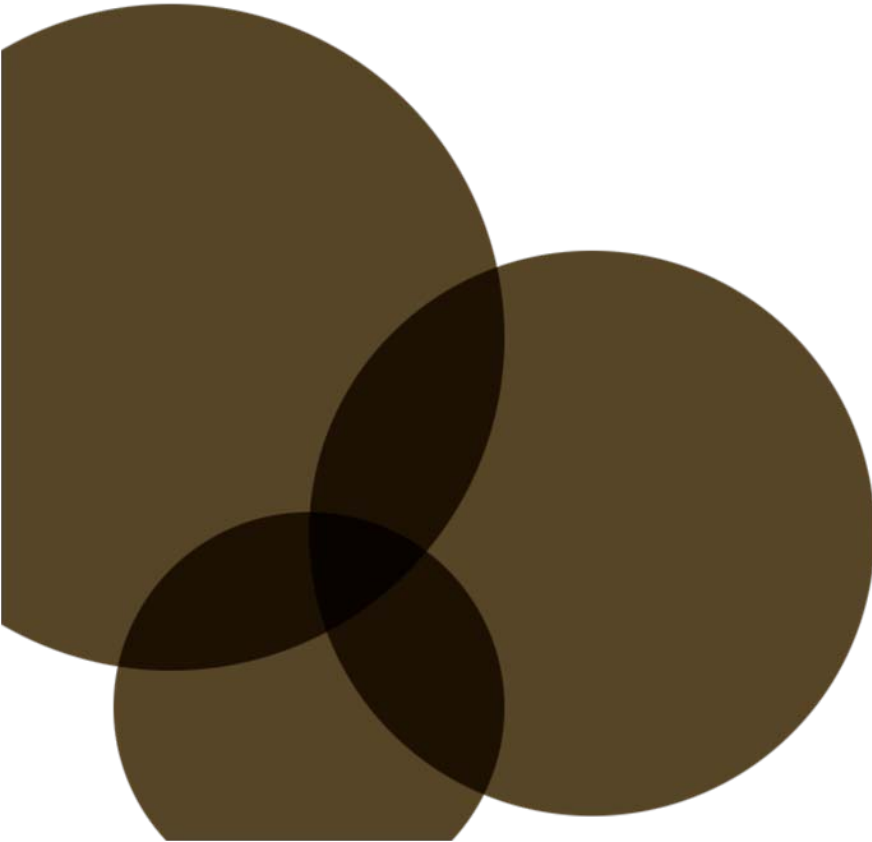


### Engagement with Software Brand Feb '09



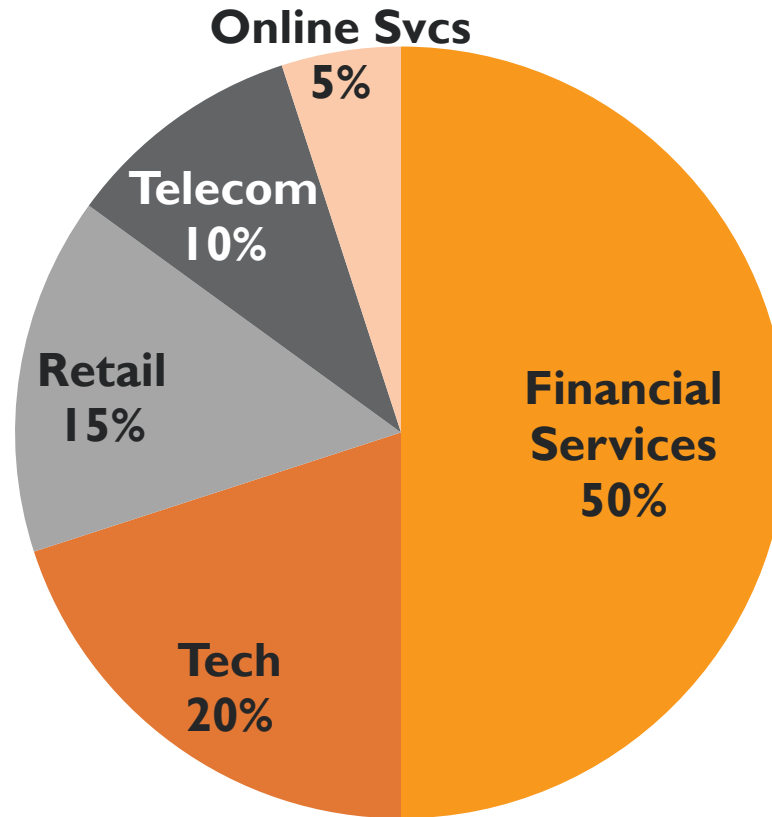


## Business News



# Top 20 Advertiser Categories

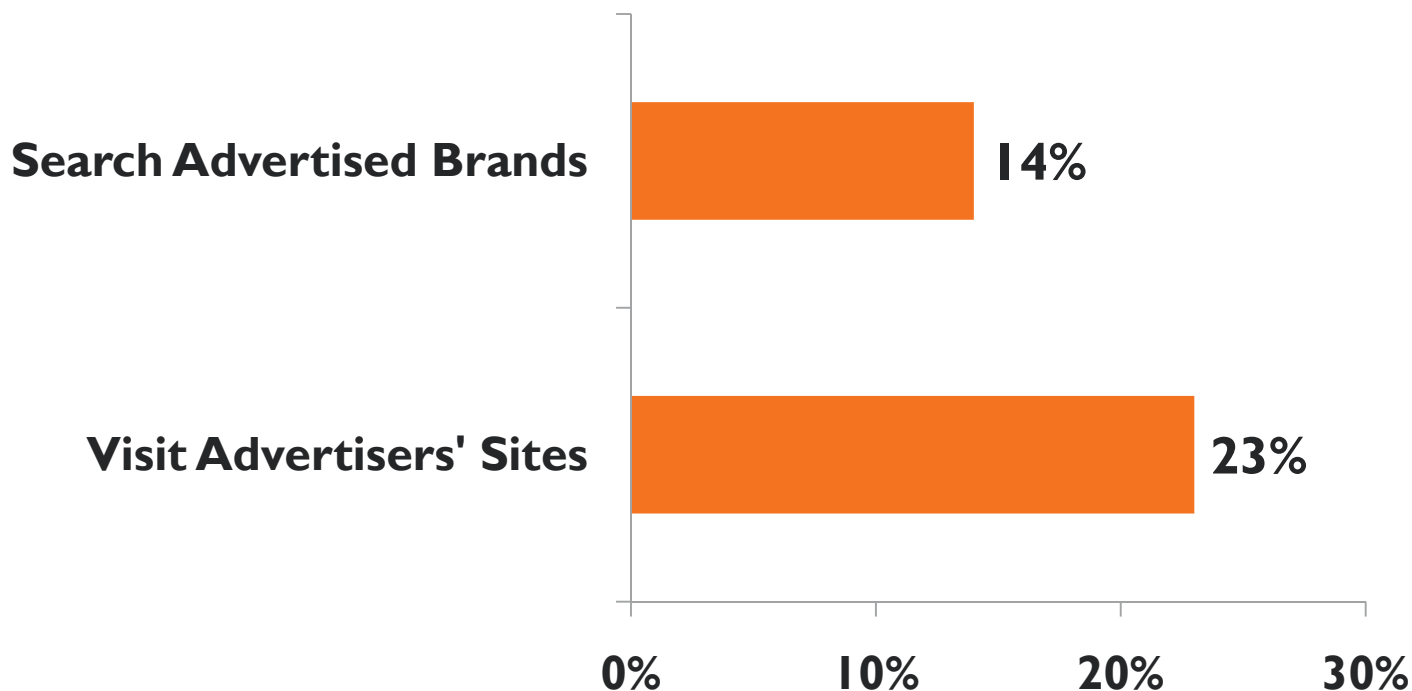
## Top 20 Advertiser Categories: Business News



# 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

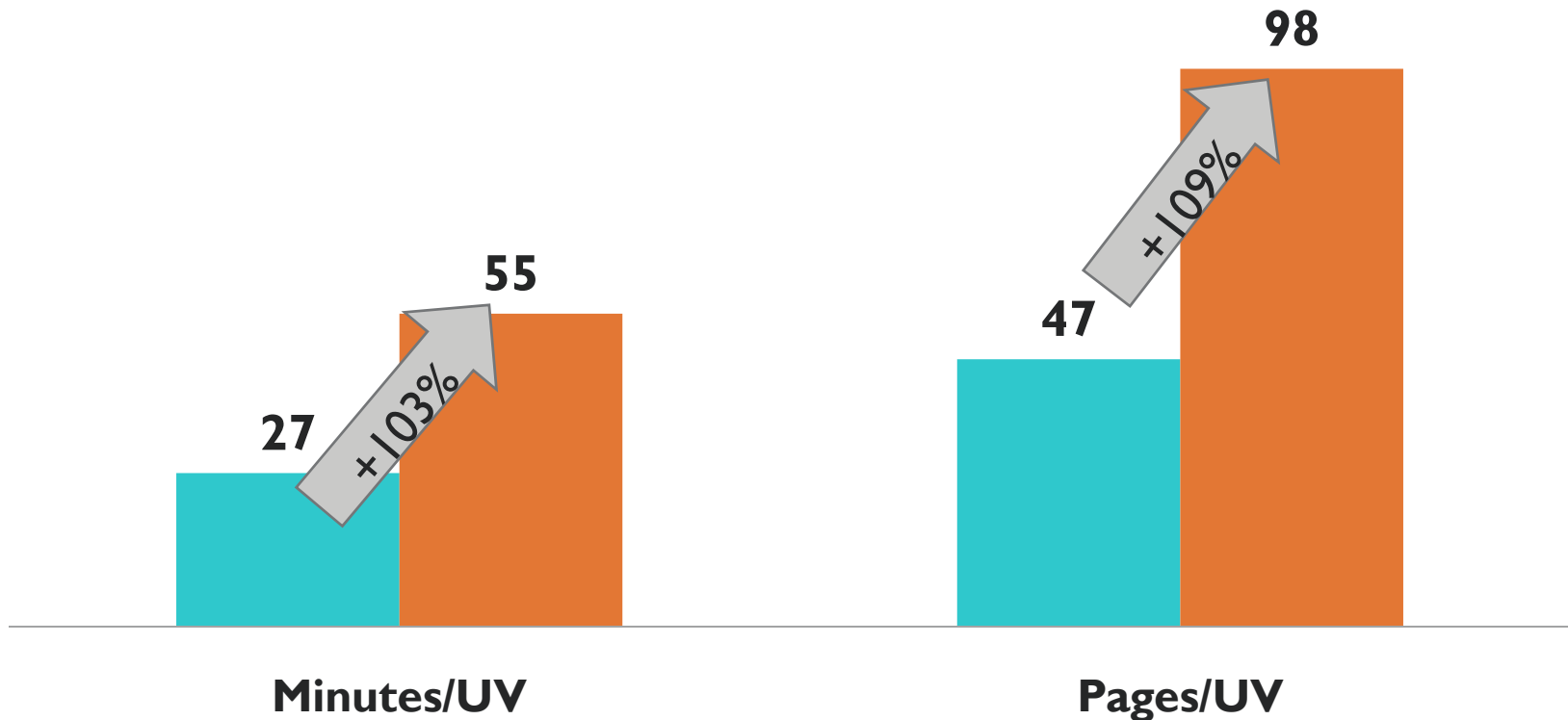


Base: 38.3 MM Exposed to at least one of top 20 advertisers  
Source: comScore Marketing Solutions, 02/09

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

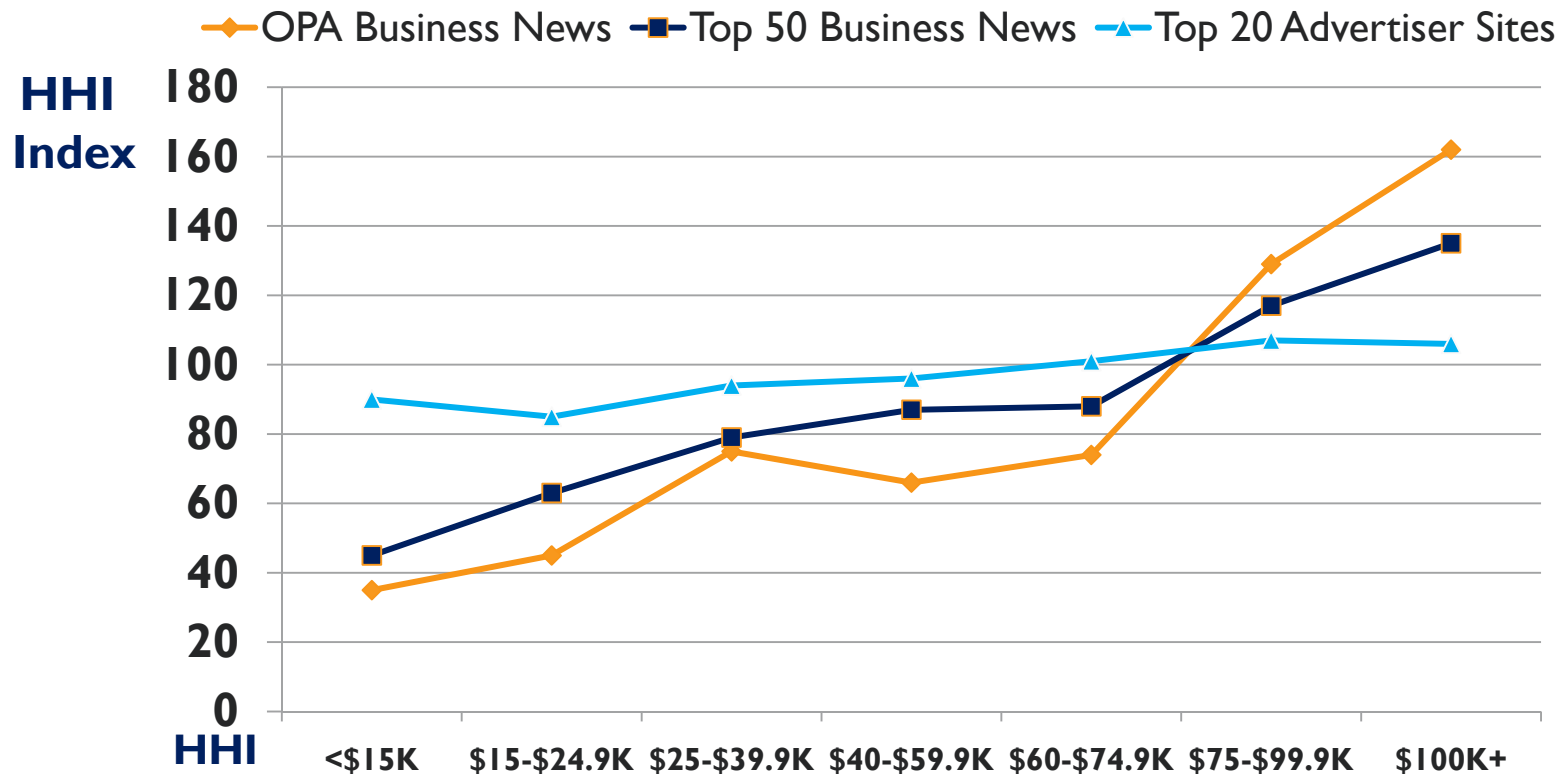
## Advertiser Site Engagement

■ 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

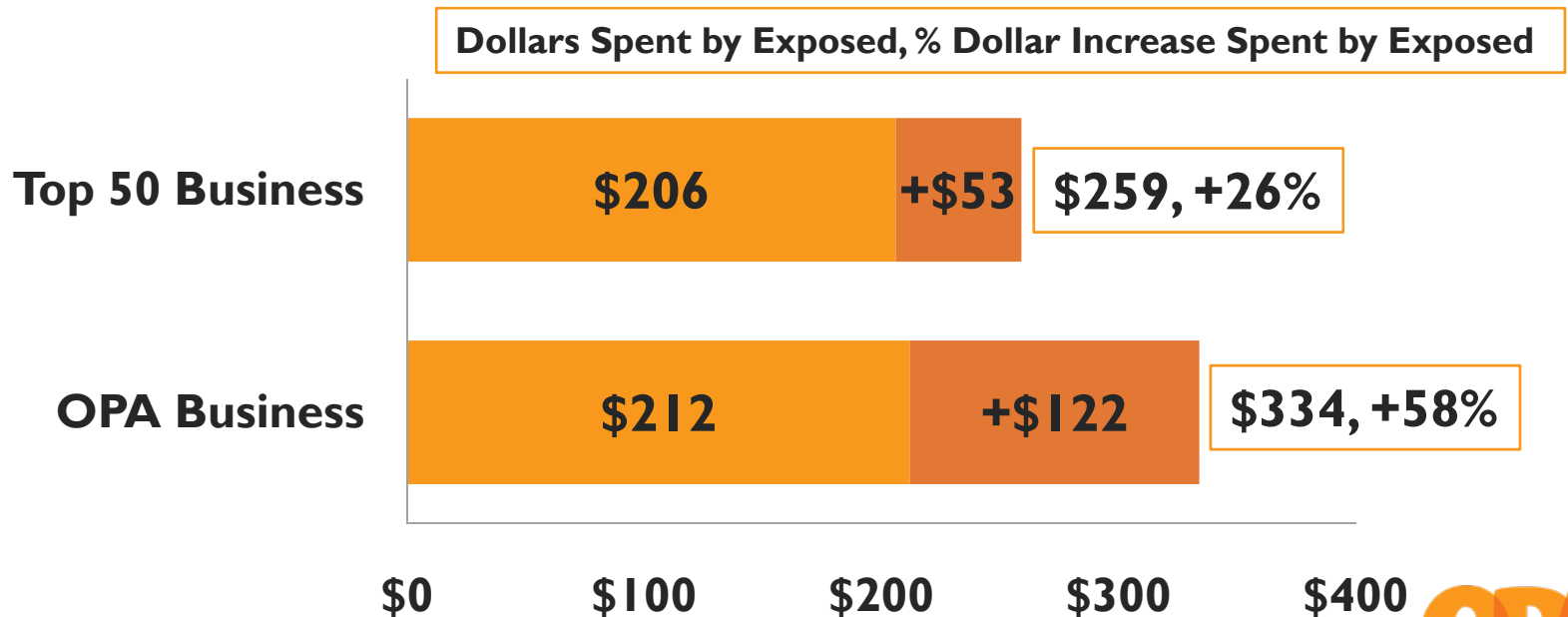


# More Ecommerce Spending by Those Exposed to Ads on Business News Sites

- 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

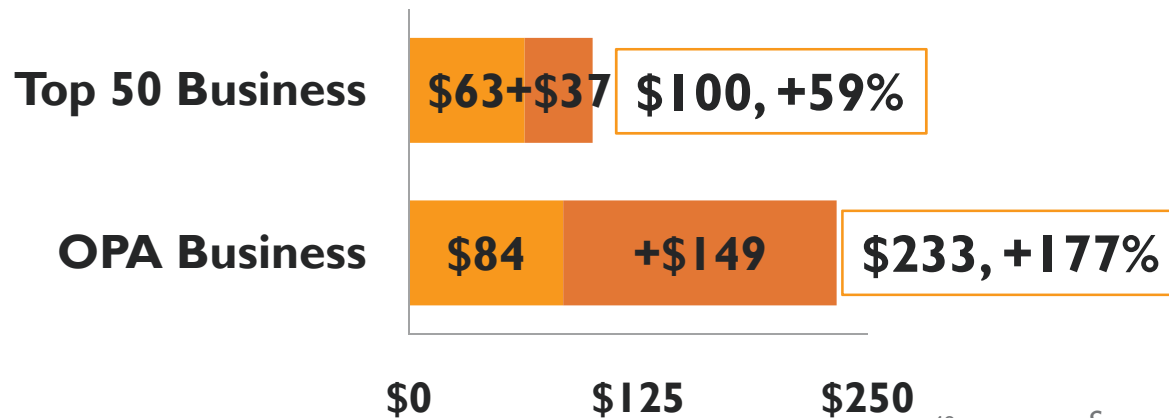
- Dollars Spent by Unexposed
- Additional Dollars Spent by Exposed

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

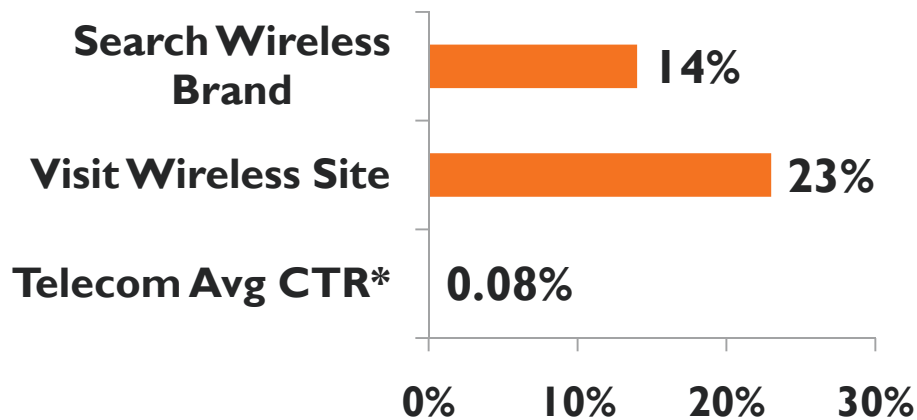
## Telecom \$/Business News Visitor Feb '09



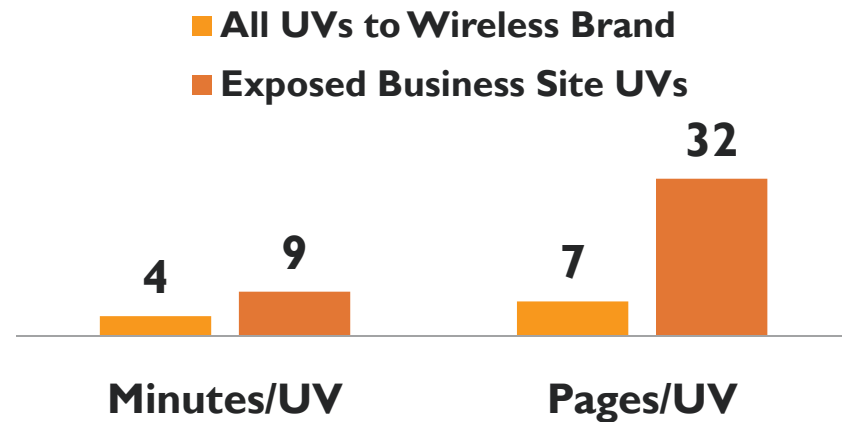
# Results for a Wireless Advertiser

- 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**

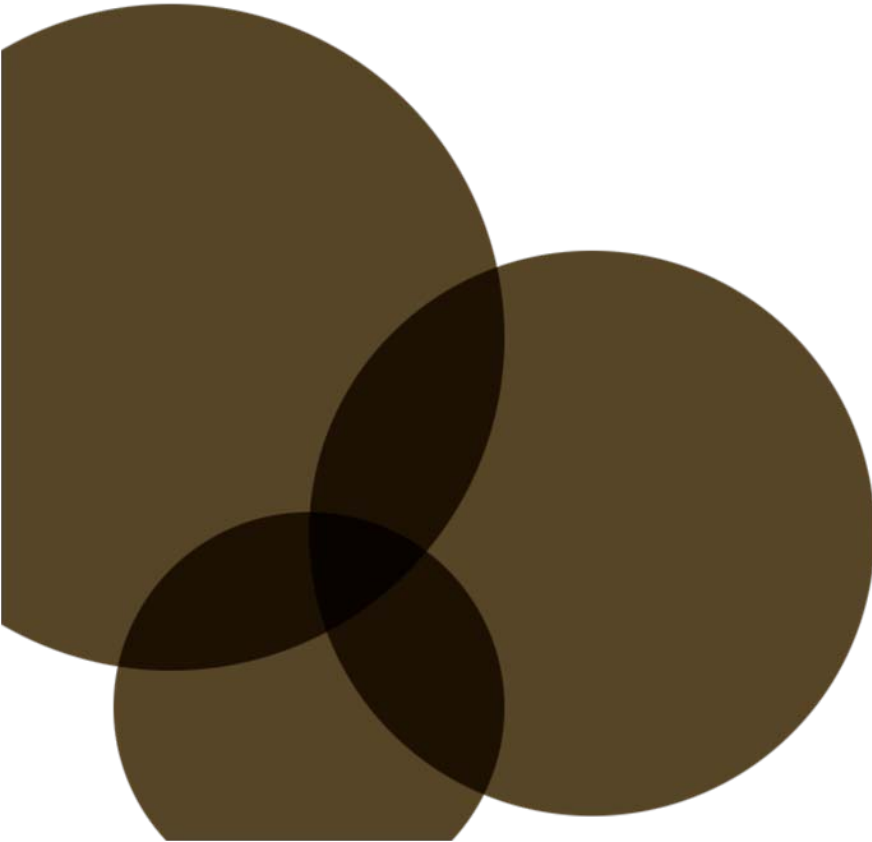


Sources: Search & Visits comScore Marketing Solutions 02/09  
 All UVs comScore MediaMetrix, 02/09; Exposed UVs comScore Marketing Solutions, 02/09  
 \*CTR Source: DoubleClick DART for Advertisers January – July 2008





## 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

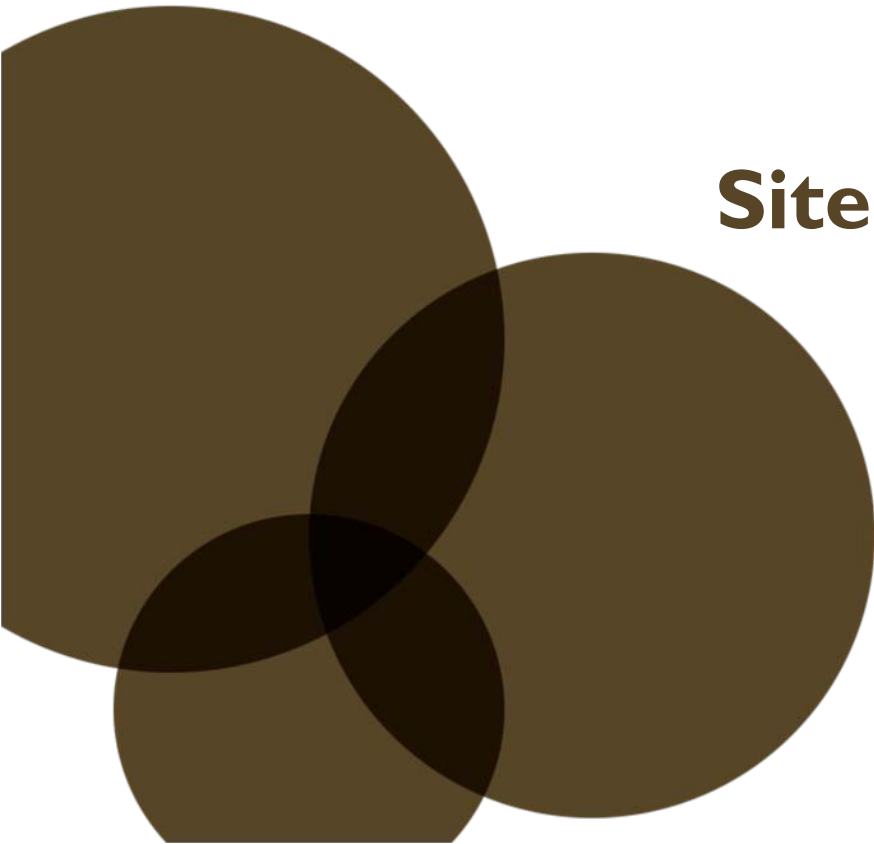


# Key Findings (cont'd)

- 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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