

online publishers association

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Audience Affinity Study

October 2002

conducted in partnership with



Millward Brown
IntelliQuest



The Premise

- Online media consumers have extraordinary control over their media choices (highly competitive)
- Sites must create loyalty or lose audience
- This research investigates the following questions:
 - Does site loyalty have a positive effect on consumers' perception of advertising and brands?
 - Is the high-affinity visitor more desirable to the advertiser?
 - Does affinity differ by type of site and/or category?

Methodology: Fielding and Analysis

- **comScore Networks**
 - Utilized comScore’s panel of 1.5 million global Internet users who have given comScore explicit permission to confidentially capture their Web-wide browsing, buying and transaction behavior (including offline purchasing), and who have agreed to receive online surveys
 - Through its patent-pending technology and strict privacy safeguards, comScore passively captured the complete detail of all communication to and from each individual’s computer – on a site-specific and respondent-specific basis
- **Millward Brown IntelliQuest**
 - Analyzed responses to develop “Affinity Index”
 - Correlated “Affinity Index” to a visitor’s site attitudes, attitudes toward advertising, and predisposition to buy branded products

Methodology: Sites surveyed

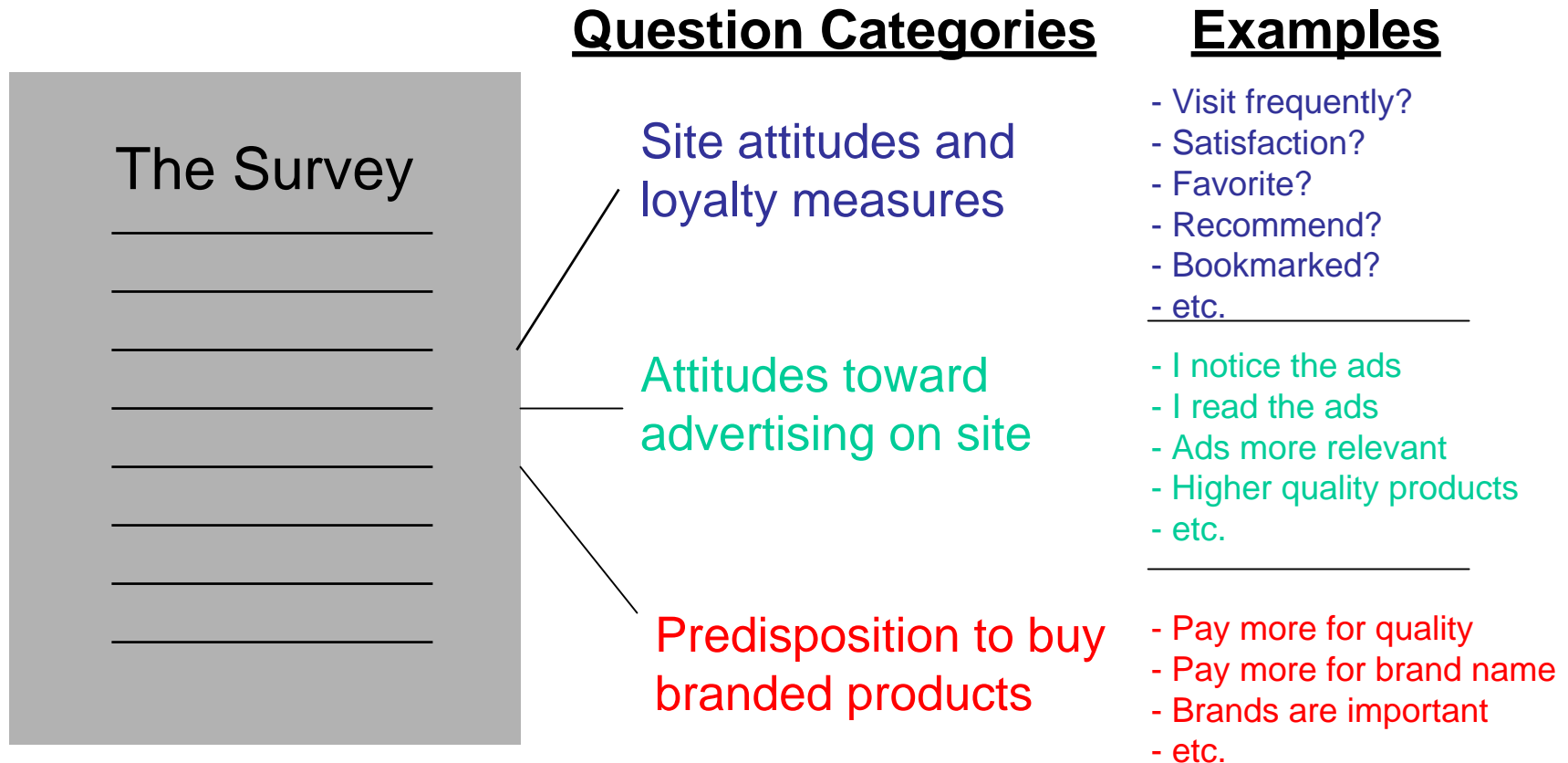
- Panelists were intercepted at the following content and portal sites:

Content Sites	Category	Portal Channels
msnbc.com nytimes.com usatoday.com washingtonpost.com weather.com Approx. 30 local newspaper sites	GENERAL NEWS	Yahoo! News AOL News
bankrate.com cbsmarketwatch.com Forbes.com wsj.com	FINANCIAL NEWS	Yahoo! Finance AOL Financial News*
espn.com sportingnews.com	SPORTS	Yahoo! Sports AOL Sports*
epicurious.com foodtv.com slate.com cnet.com discovery.com	SPECIAL INTEREST	N/A

- A total of 4,980 surveys were completed

*For the indicated channels, AOL.com users were intercepted and asked about the primary reason for their visit that day.

Methodology: Survey Details

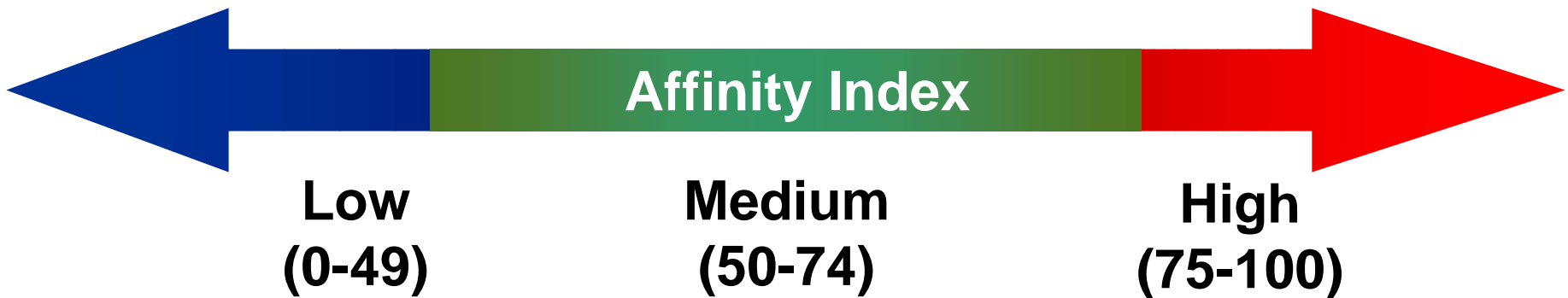


Derivation of Affinity Index

- Site attitudes and loyalty measures were correlated with positive responses to advertising questions
- The three measures which most strongly correlated were:
 - Likelihood to **recommend** (60% weight)
 - **Satisfaction** with content (24% weight)
 - Status among **favorites** (16% weight)
- These measures were weighted as indicated in order to create an Affinity Index

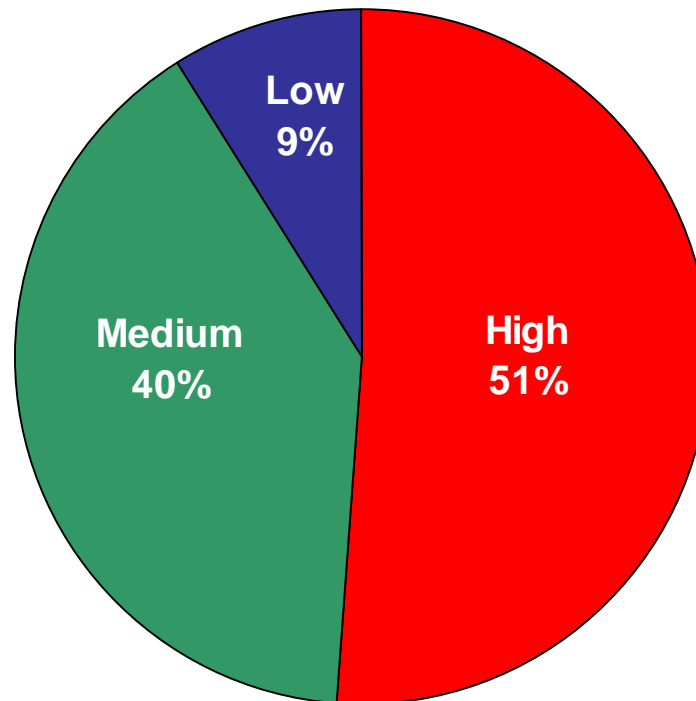
Derivation of Affinity Index

- Each of the respondents was classified as having either high, medium or low affinity to the site on which they were surveyed



Site Affinity

- Just over half of the study participants* were classified as having “High Affinity” to the site on which they were surveyed



* Content and Portal sites weighted equally.

Site affinity is higher among loyal visitors

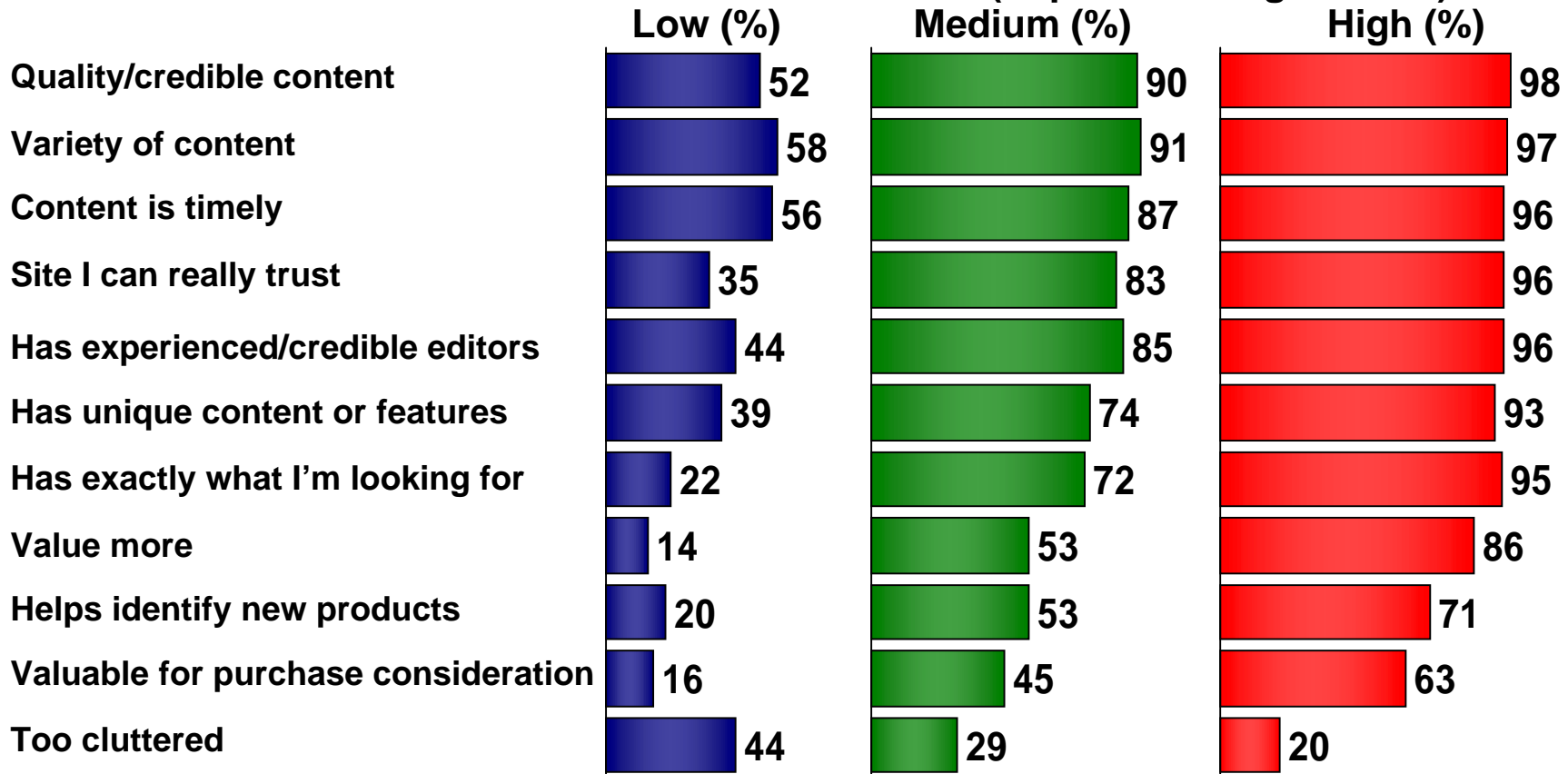
	Low	Medium	High
	%	%	%
	A	B	C
Number of minutes on site (Past 30 days)			
1 to 5 minutes	44 BC	33 C	22
6 to 20 minutes	25	24	20
20 to 60 minutes	15	21	24 A
More than 60 minutes	16	21	34 AB
Weighted Base: Total	(155)	(1025)	(1399)

Data represent actual minutes on site as measured by comScore; data are not self-reported by respondents.

Site affinity predicts positive site ratings

ATTITUDES TOWARD SITE

AFFINITY (Top two box agreement)

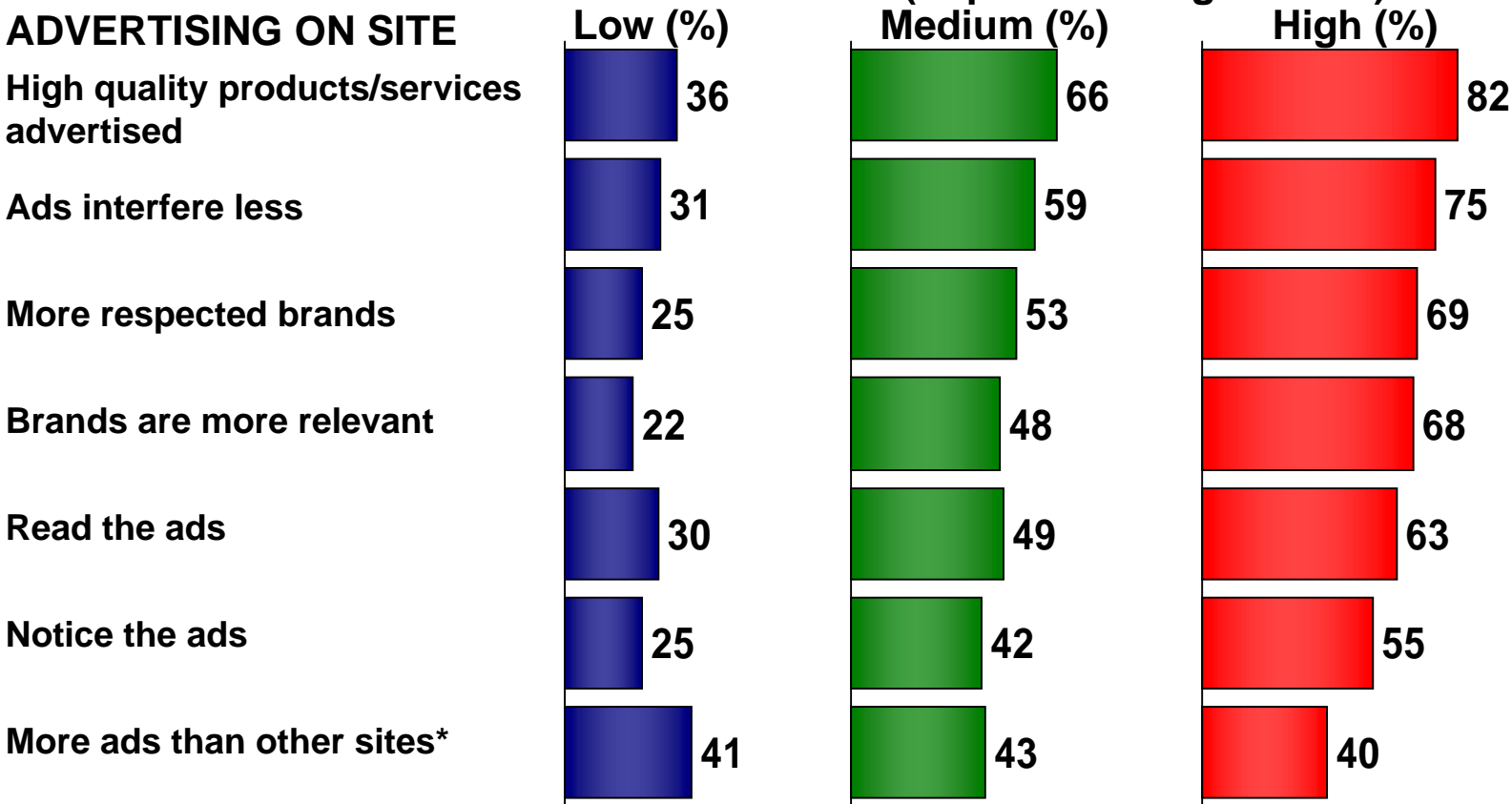


Q26. Below are statements that may or may not describe your opinion of (Site). Please indicate how much you agree or disagree with each statement by checking the one box that most closely applies in each row.

Site affinity predicts positive predisposition toward advertising

ATTITUDES TOWARD ADVERTISING ON SITE

AFFINITY (Top two box agreement)



* The only statement without significant differences among the 3 cells.
 Q29. Thinking about (Site) compared to other (category) Websites or Channels, please indicate whether you agree or disagree with the following statements.

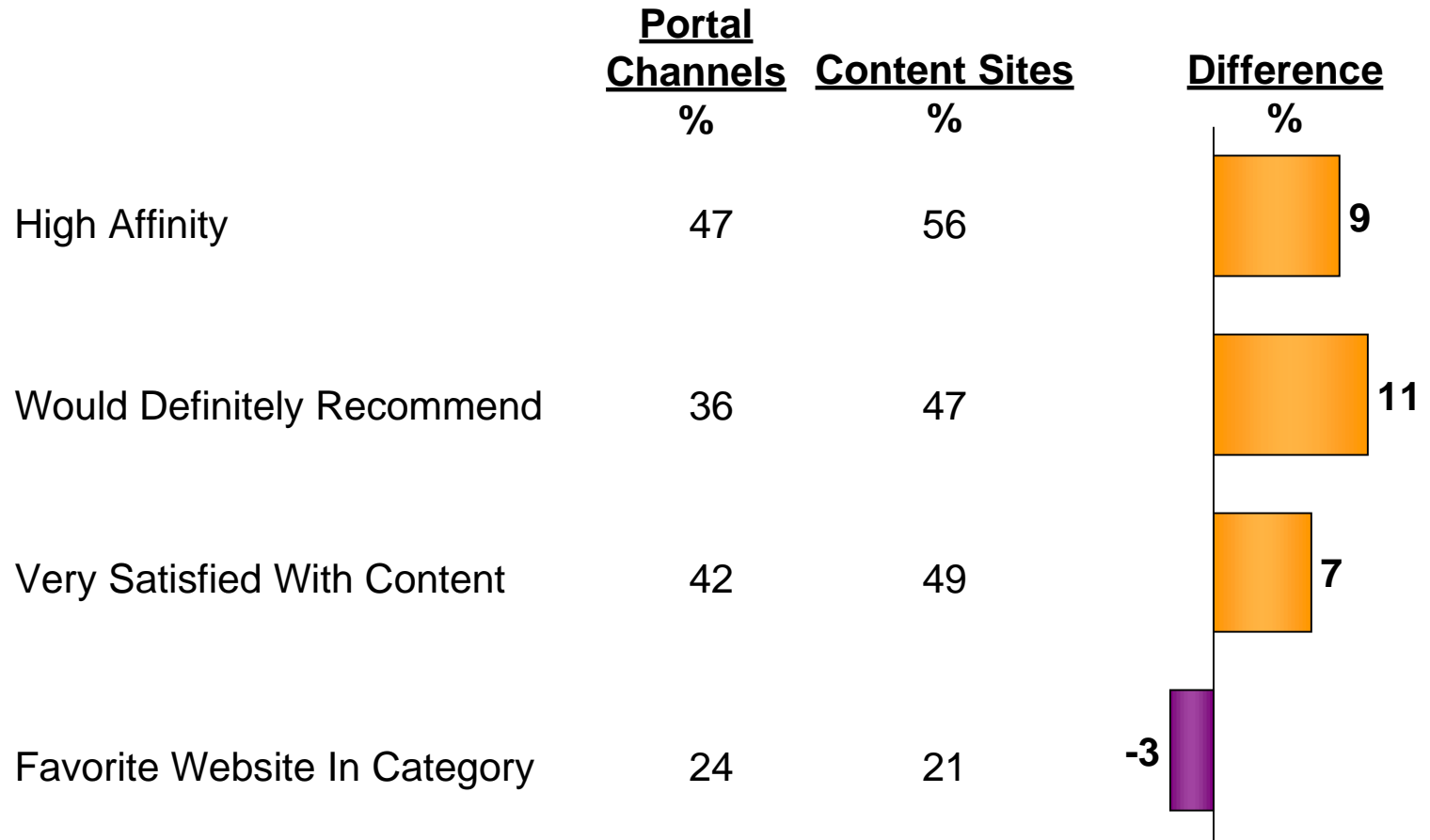
Higher affinity audiences are more valuable to advertisers

BRAND ATTITUDES	Low		Medium		High
	%		%		%
	A		B		C
I always prefer to buy a high quality product or service, even if I have to pay a little more	80		84		88 AB
I will spend more to buy a brand name I know and trust	80		82		87 AB
Brands are all the same, I shop around for the best price	56		55 C		49
It is important to me which brands I choose	71		74		81 AB
Brand names do not add anything, it is the product or service that matters	68		73 C		67
I always like to try new and different brands	59		65		67 A

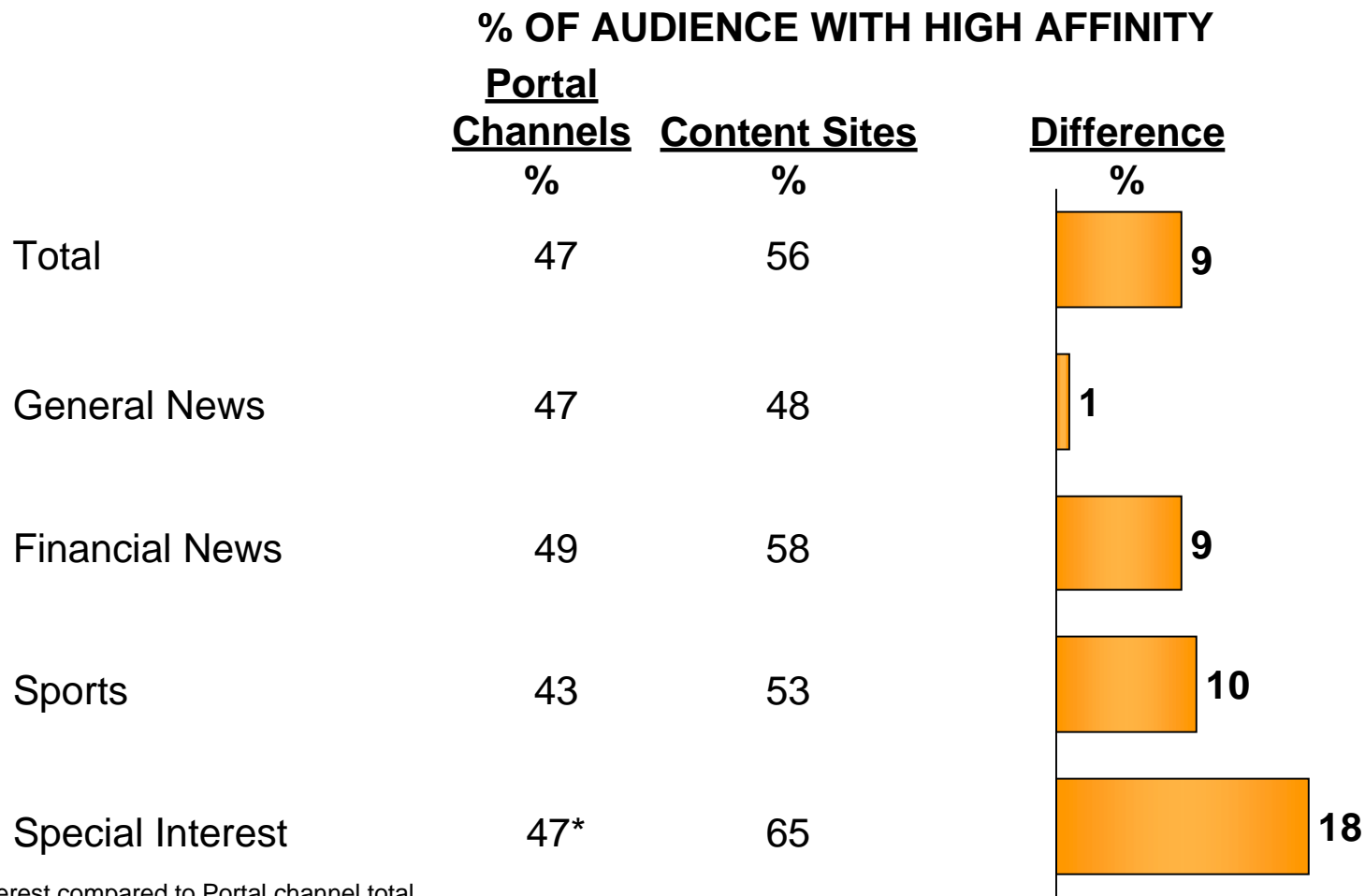
Q14. Please indicate your level of agreement with each of the following statements about your preferences when purchasing goods and services generally.

A/B/C = Significantly different at the 95% confidence level.

There's a greater percentage of high affinity consumers on content sites



The concentration of high affinity visitors varies by type of site



* Special Interest compared to Portal channel total.

Implications

- High-affinity audiences are more valuable to advertisers
- Content sites have greater concentration of high-affinity audiences than do portal channels
- Advertisers will experience greater advertising efficiency with high-affinity audiences
- Advertisers will have greater efficiency in reaching high-affinity users by including content sites in their media plan