



Online Publishers  
Association

# **A Sense of Place: Why Environments Matter**

June 2010

*Conducted in partnership with*





# Online Publishers Association

- The Online Publishers Association (OPA) is a not-for-profit trade organization dedicated to representing high-quality online content providers before the advertising community, the press, the government and the public
- OPA's membership has an unduplicated audience of 172.5 million unique visitors or 83% reach of the U.S. online population (comScore Media Metrix, January 2010)

# 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'.”*

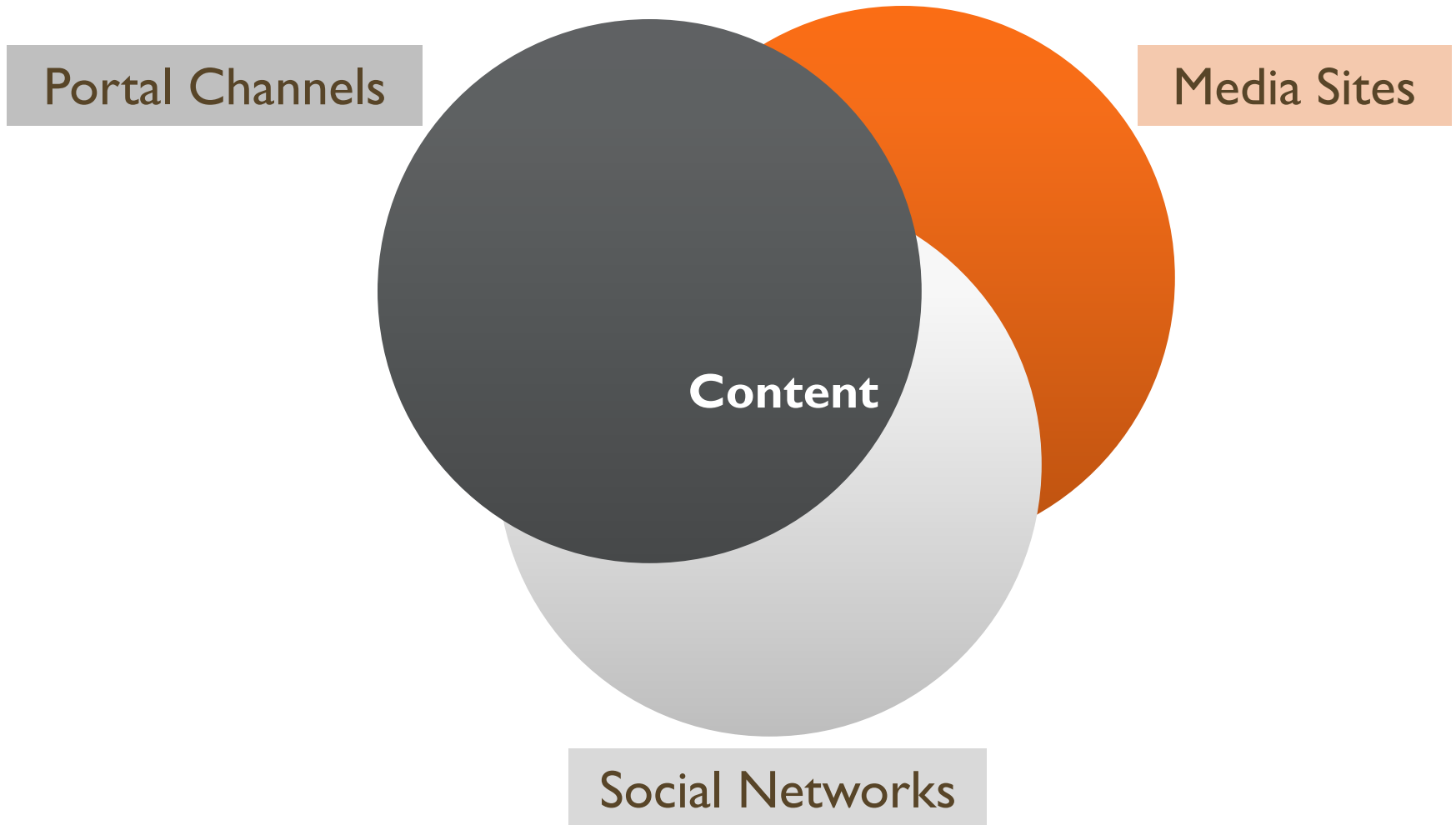
*— Leo Burnett (1891–1971)*



# Research Objectives

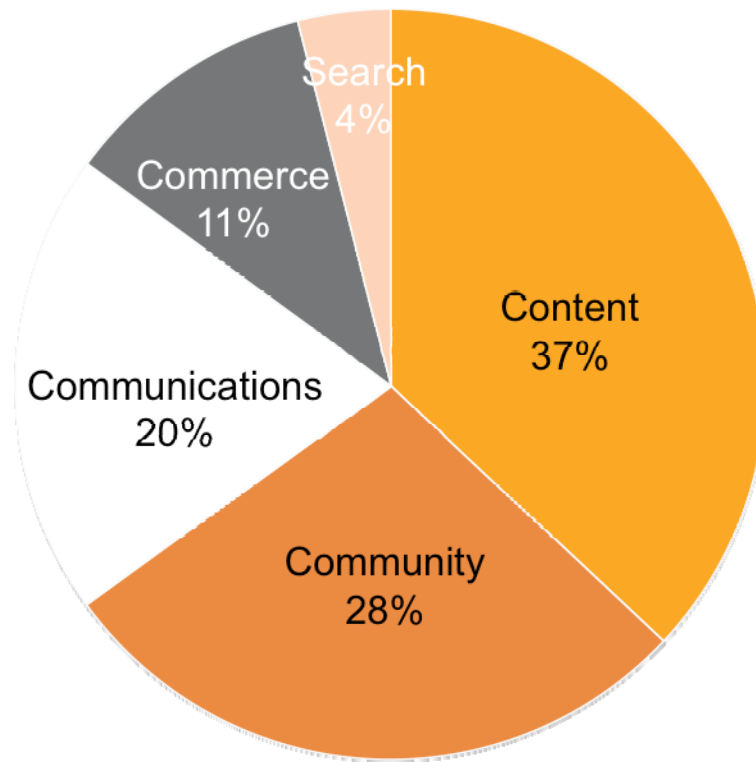
- Are different online environments perceived differently by consumers?
- Do consumer “connections” with content vary by environment?
- What impact do these “connections” have on a brand’s message?
- What are the implications for advertised brands when an audience makes an emotional connection to a site?

# 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

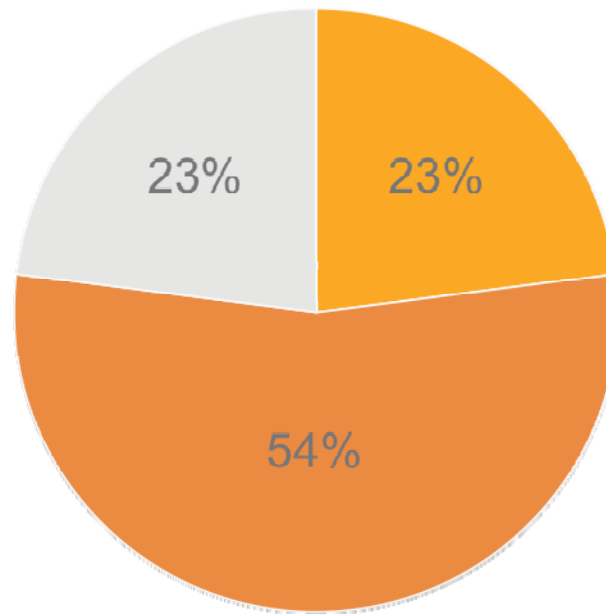
- Online survey of 2,910 respondents, fielded March 11 – April 19, 2010
  - Sample source: Harris Online Panel (HPOL)
- Respondents were qualified on these dimensions:
  - U.S. residents ages 18+
  - No sensitive industry employment (e.g., market research, advertising, media)
  - Use Internet at least 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!”*

### 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

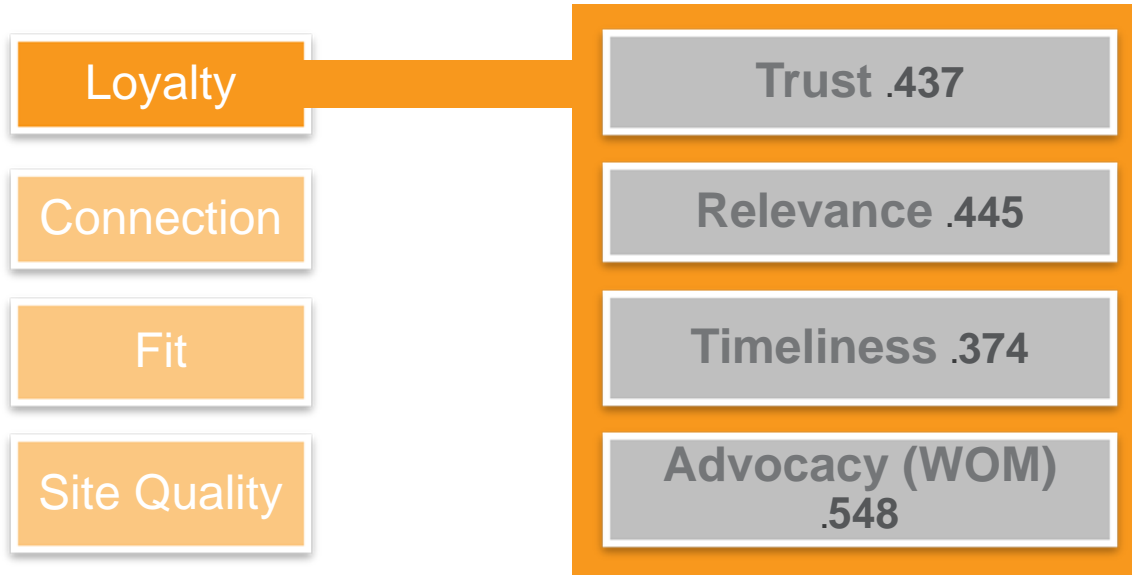
# Quality Content Engenders Loyalty to a Site

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....**

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Fit

Site Quality

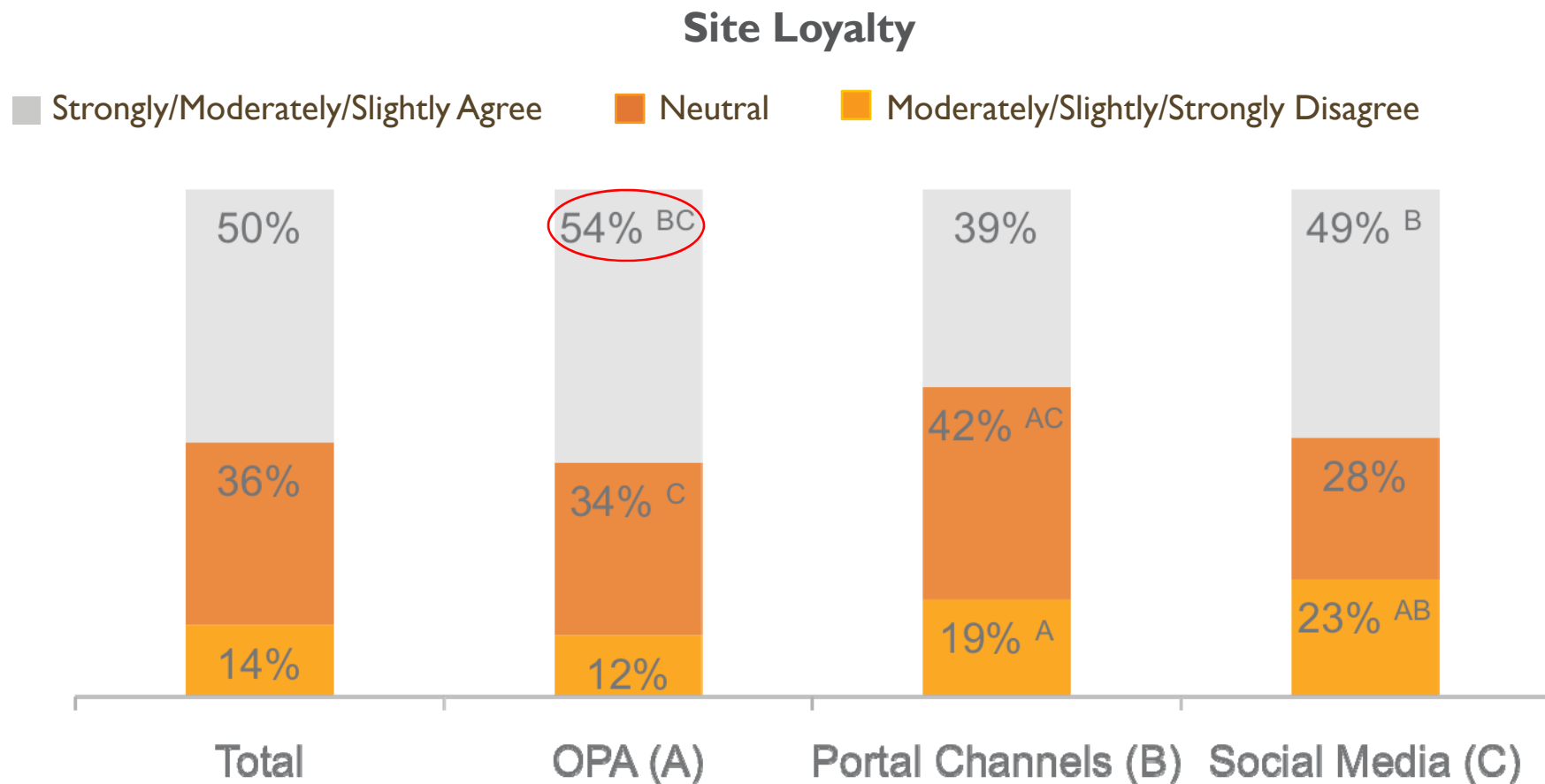
Trust .479

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)

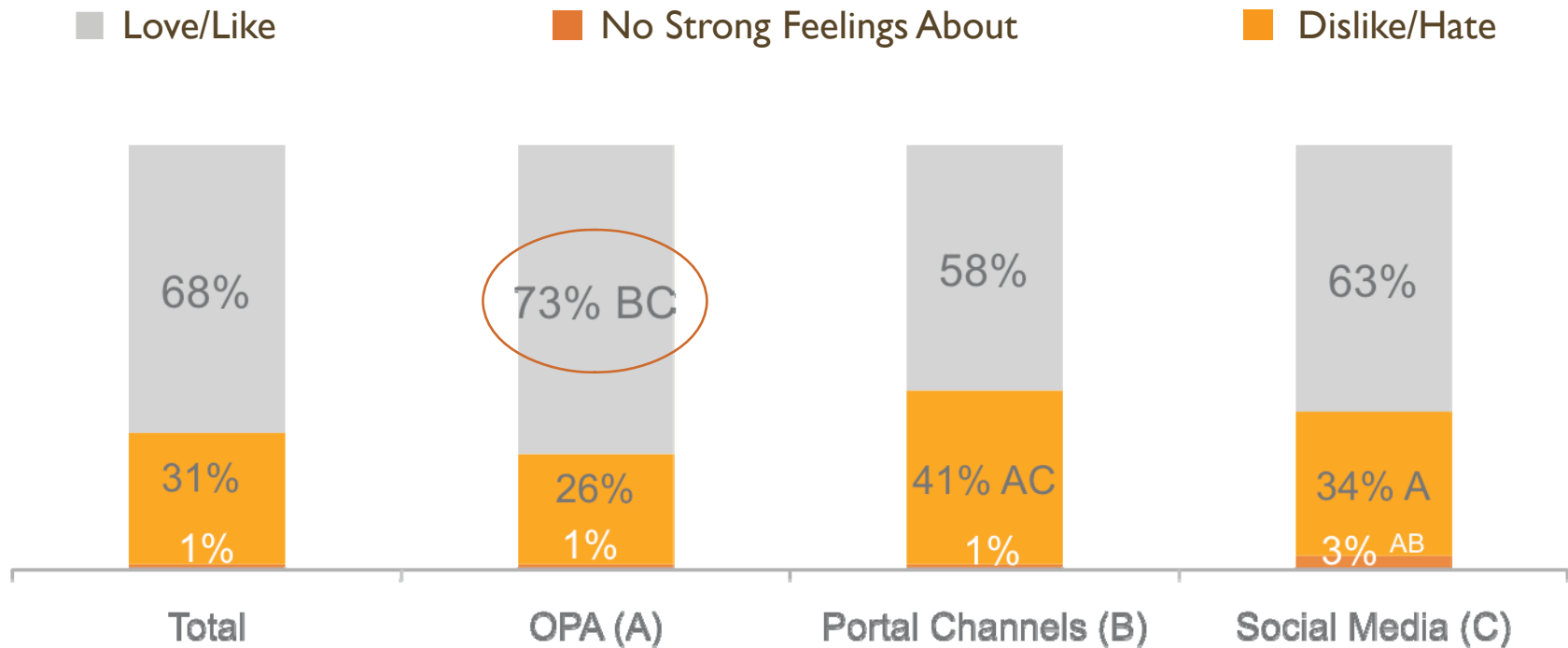
Q. On a 7-point scale where 1 = Strongly disagree and 7 = Strongly agree,  
How much do you agree or disagree with the following statement:

I feel very loyal to [SITE]

Superscripted capital letters (<sup>A,B,C</sup>) 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



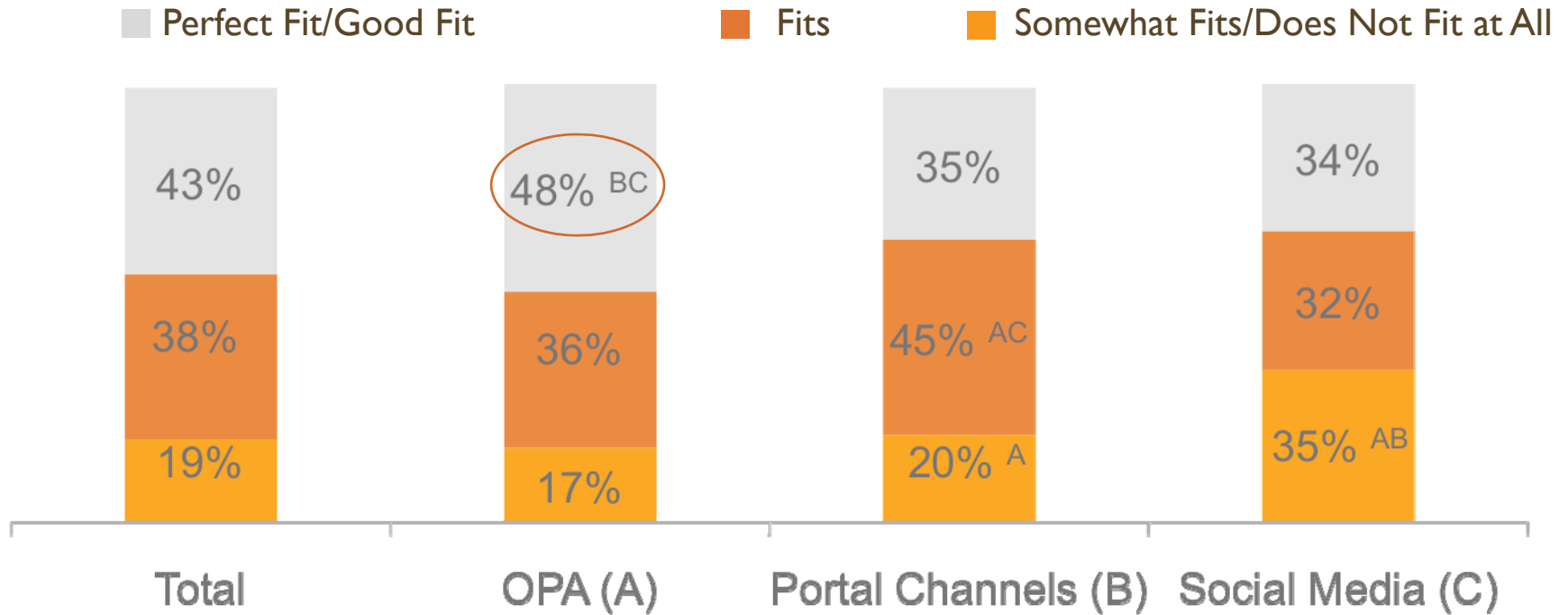
BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)  
Q.Thinking about [SITE], would you say that it is a site you ...

Superscripted capital letters (<sup>A,B,C</sup>) 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 (<sup>A,B,C</sup>) indicate statistically significant differences at 90% confidence between site categories

# Social Media More Likely to Generate WOM

## Ways Sites Are Discussed (% 'Yes')

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

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

# Creating Superior Environments Requires ...

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**Dimensions  
That Matter ...**

Loyalty

Connection

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

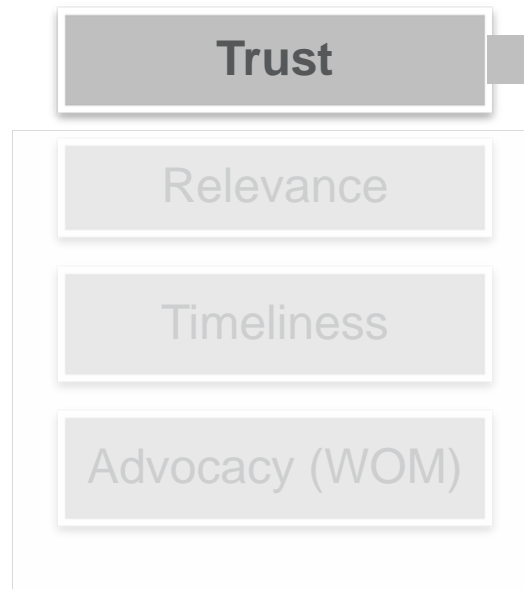
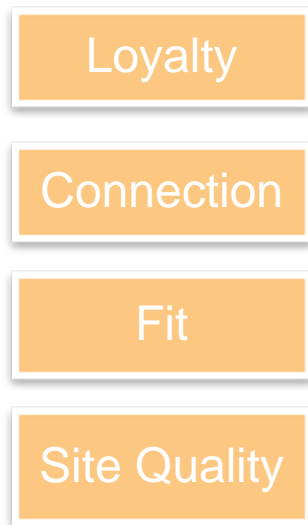
**Dimensions  
That Matter ...**



**Are Based Upon....**



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



# 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

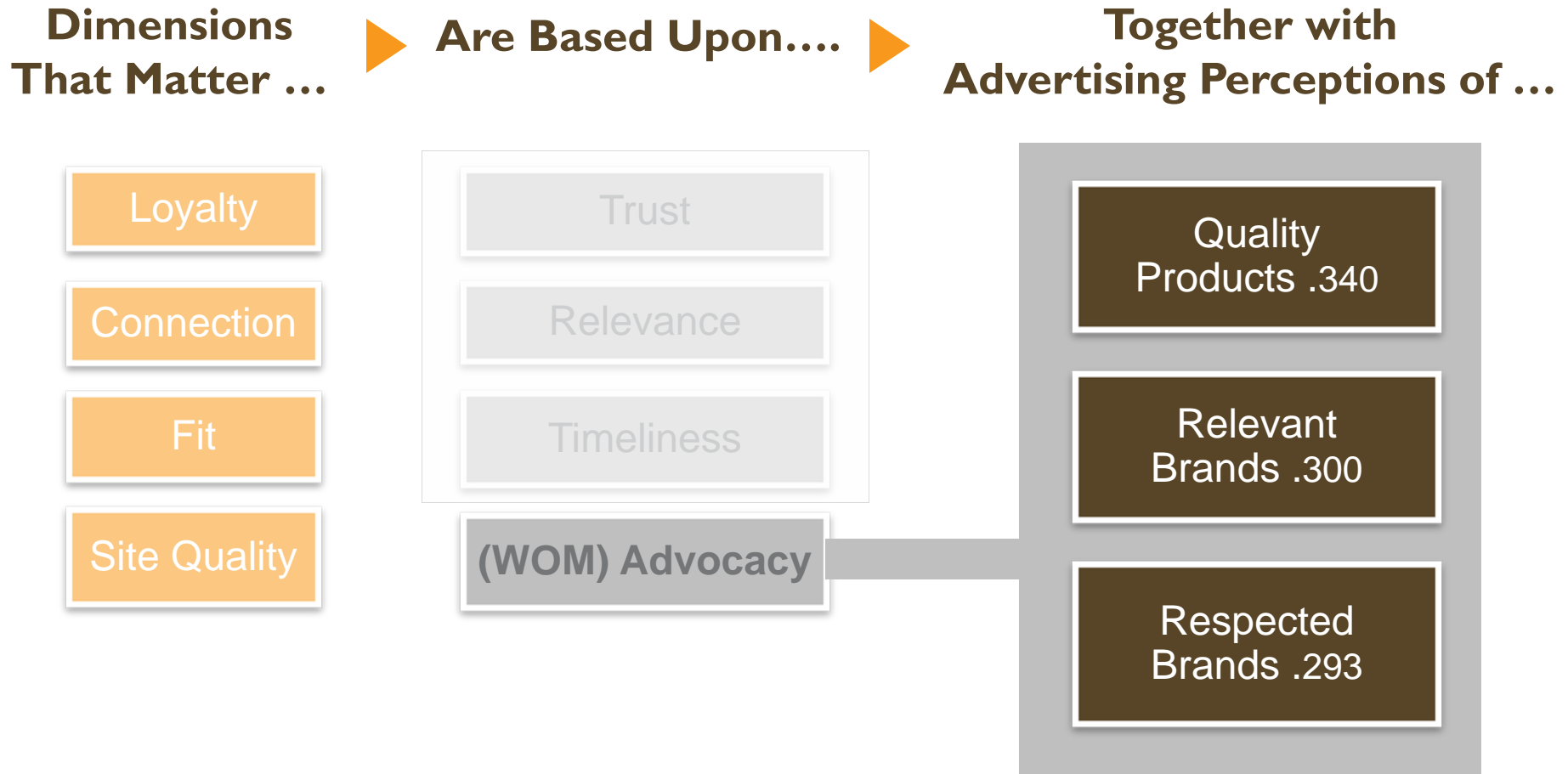
Relevant  
Brands .243

Respected  
Brands .269



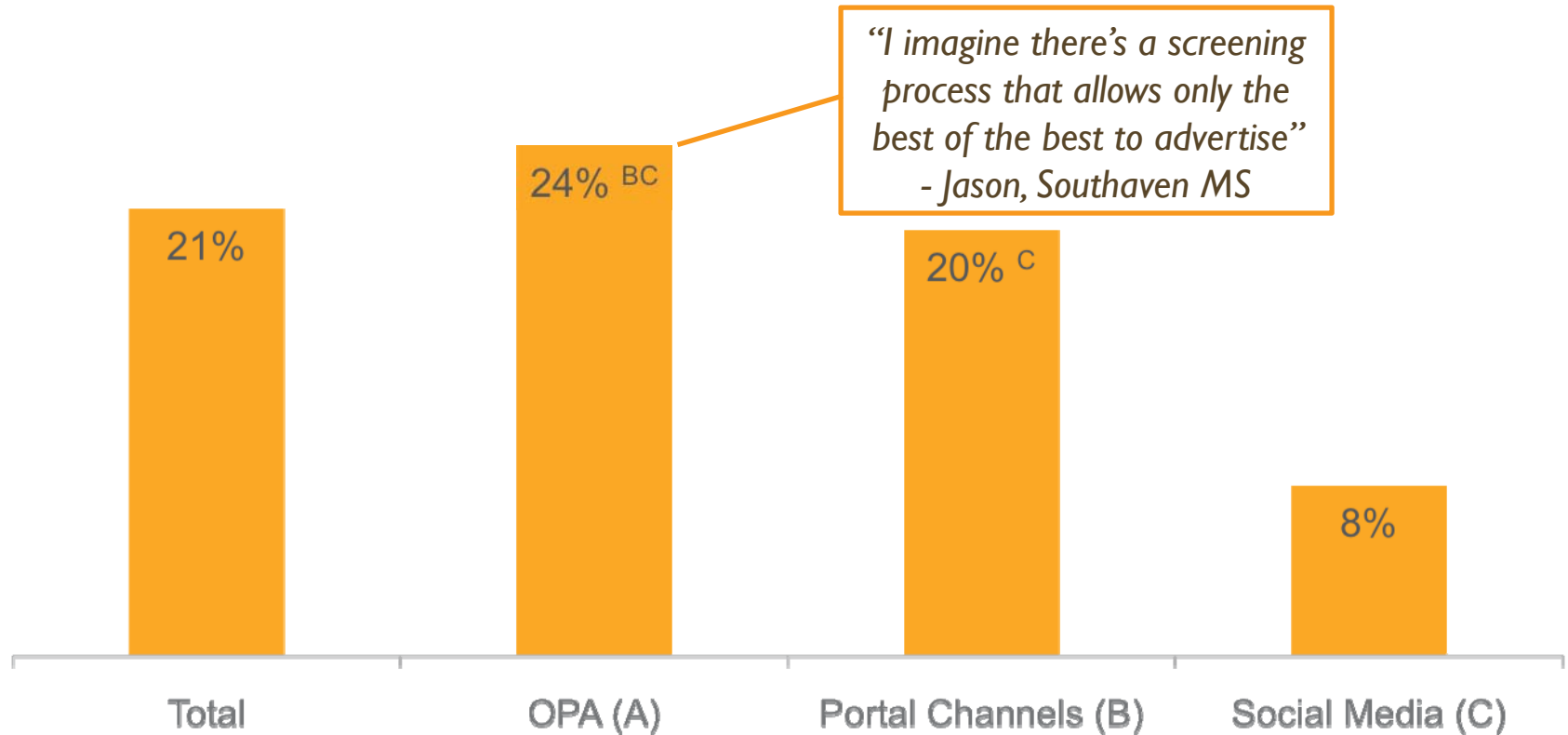
# ... as Does the Willingness to Recommend a Site to Family and Friends.

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



*"I imagine there's a screening process that allows only the best of the best to advertise"*  
- Jason, Southaven MS

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

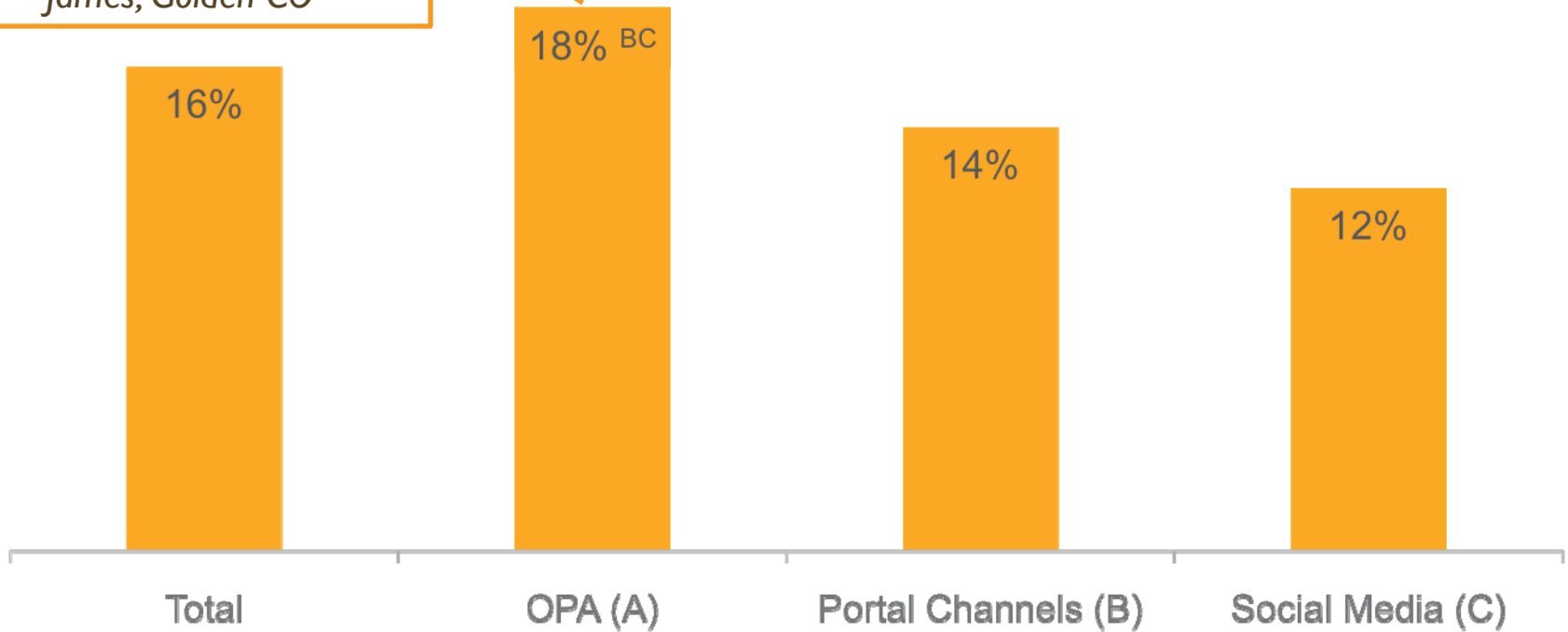
Q. Please indicate how much you agree or disagree with the following characteristics regarding [SITE]:

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

*"I feel like I get preferential treatment from advertisers because it's more tailored"*  
- James, Golden CO



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

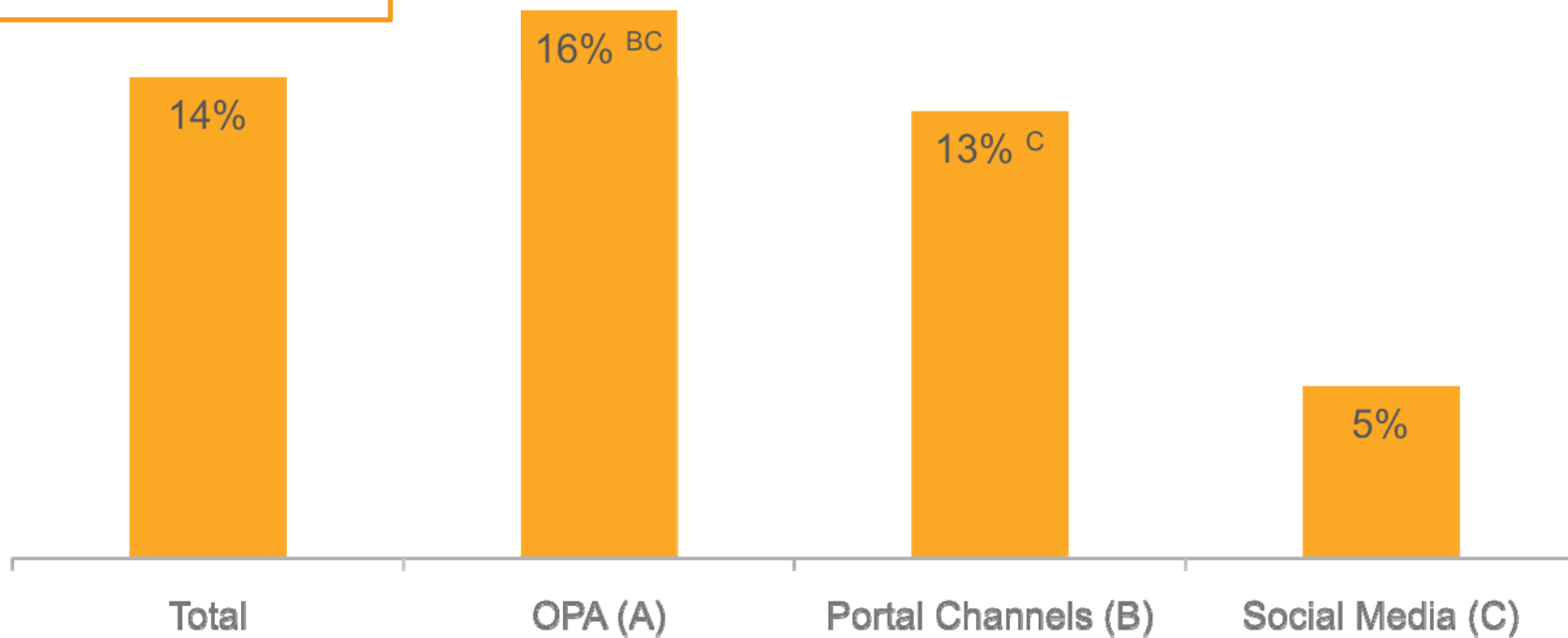
Q. Please indicate how much you agree or disagree with the following characteristics regarding [SITE]:

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**

*"If...advertised on [SITE], it would make me think it's a valuable brand"*  
- Jennifer, Mebane NC



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 (<sup>A,B,C</sup>) 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?

# Creating Superior Environments Requires ...

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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

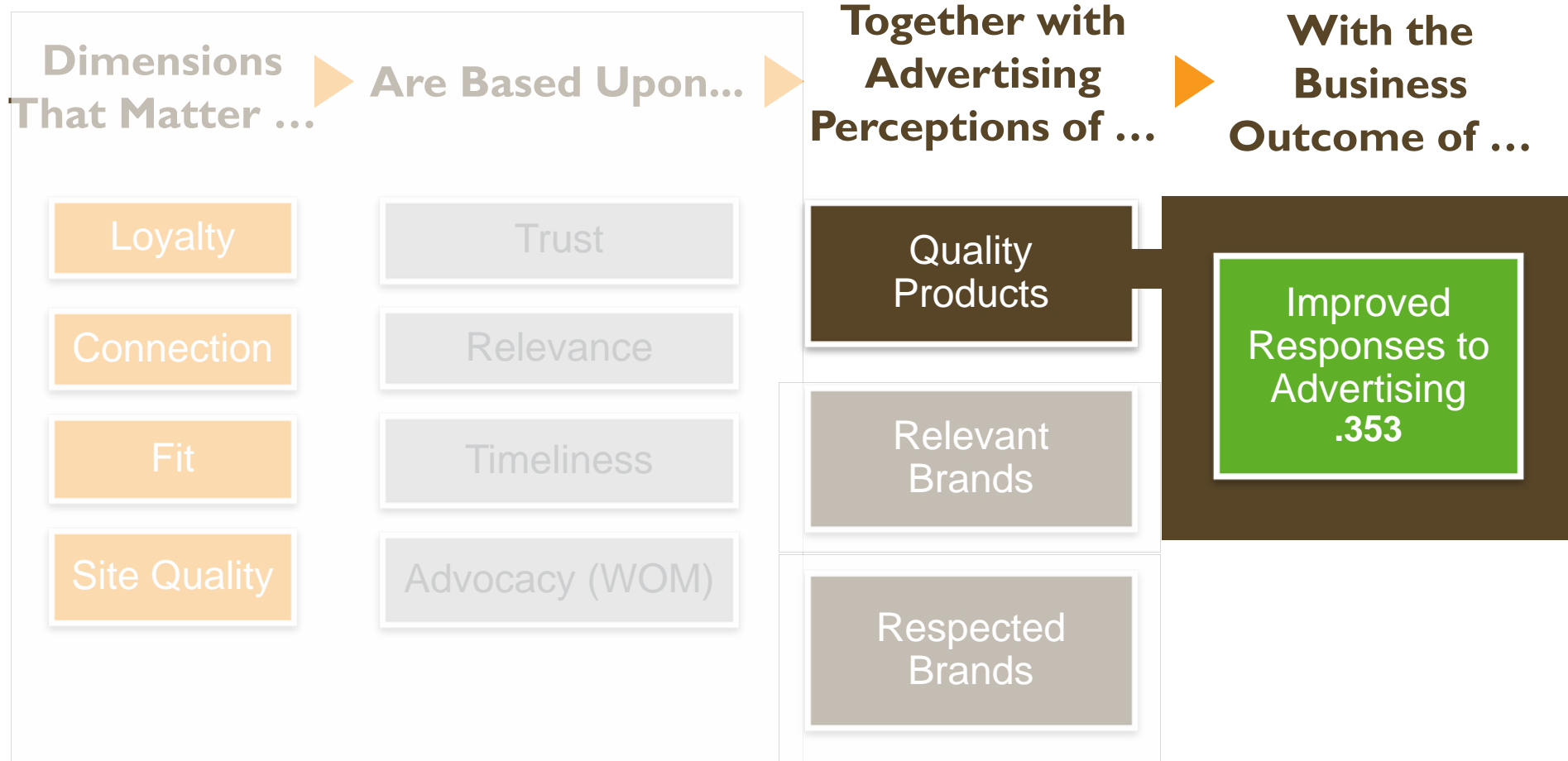
Relevant  
Brands

Respected  
Brands

Improved  
Response to  
Advertising

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

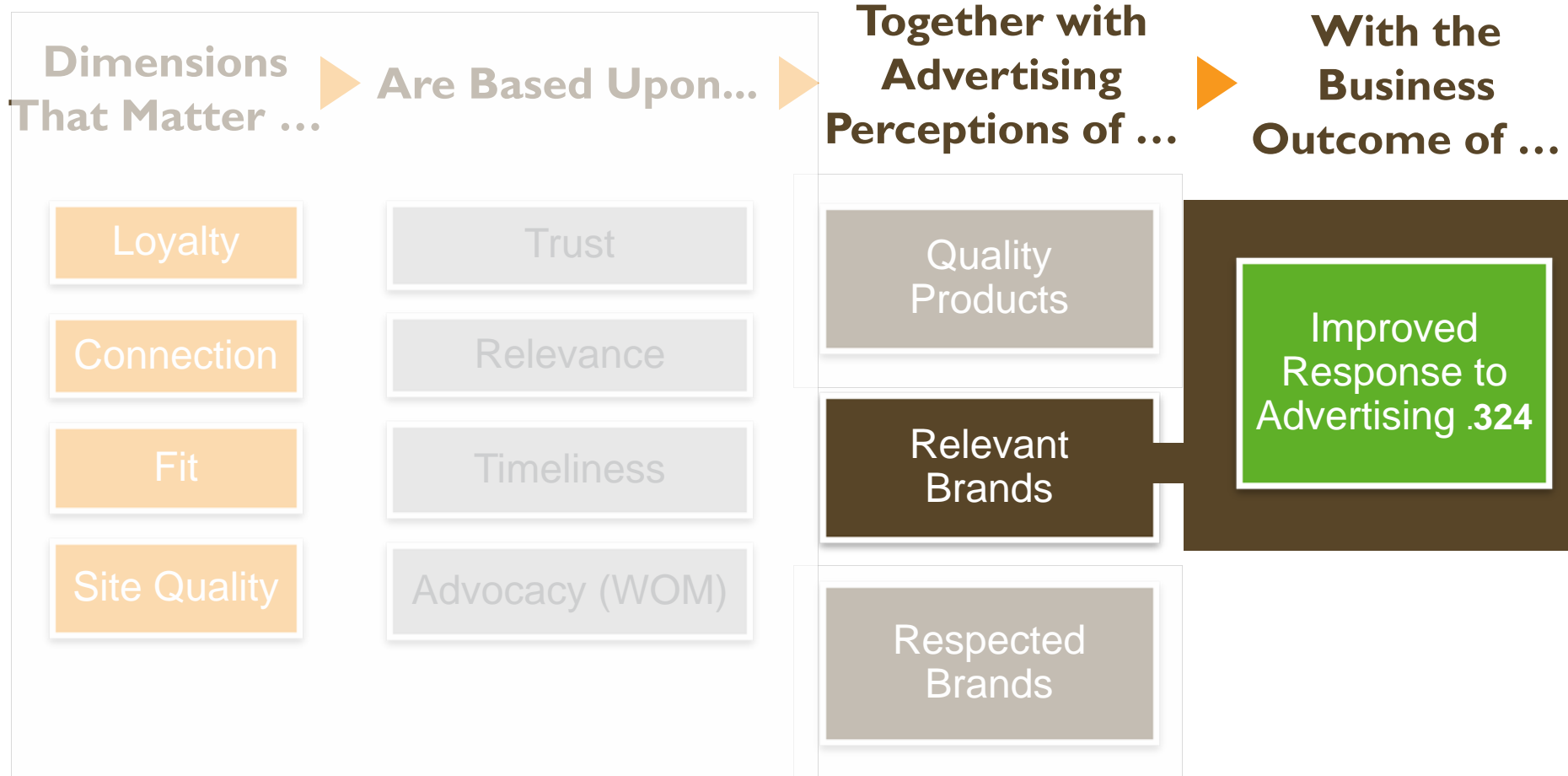
Correlations of .3+ are moderately strong





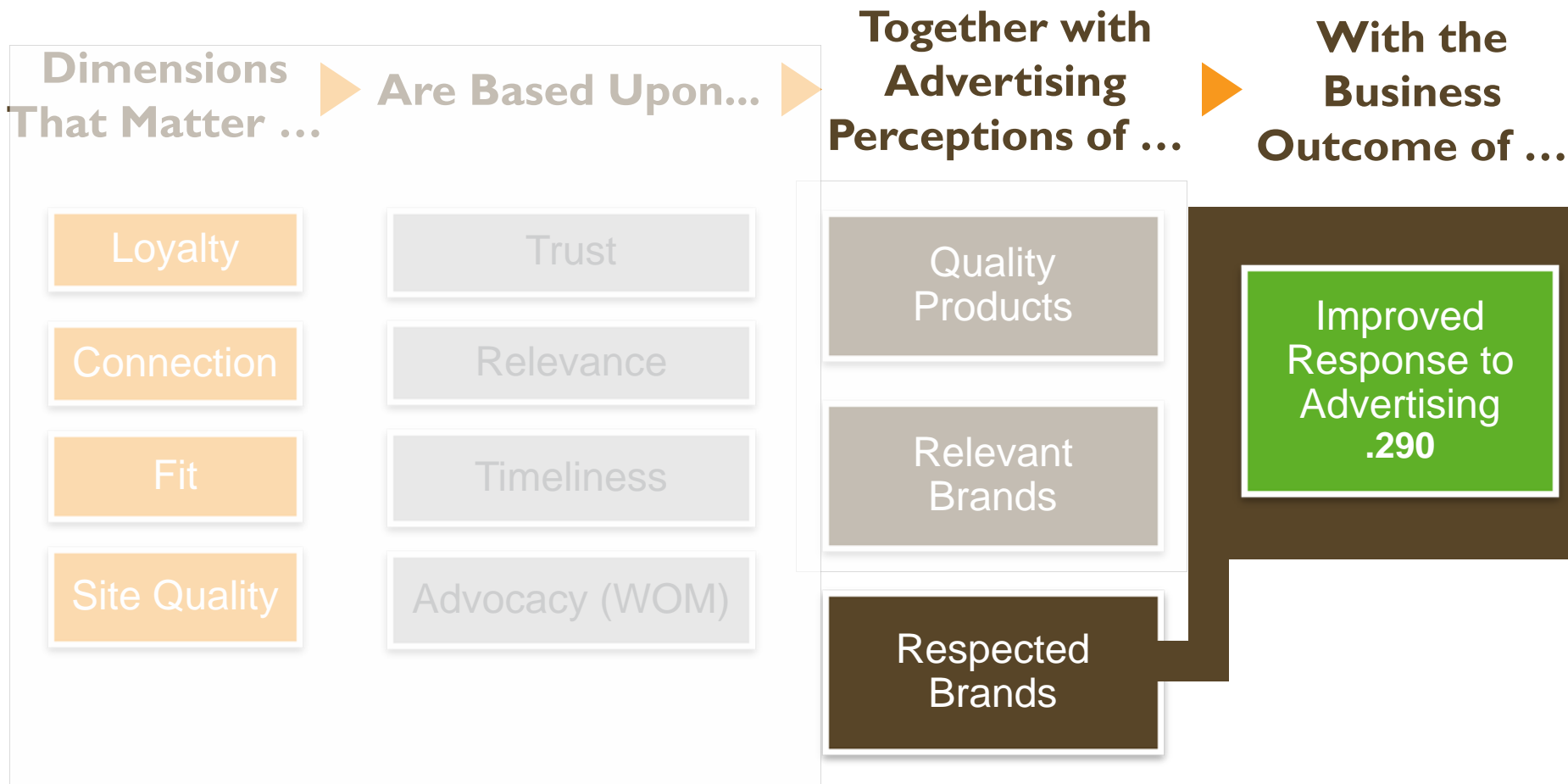
# The More Relevant the Brand, the More Likely Consumers Will Respond to its Online Advertising

Correlations of .3+ are moderately strong



# Respected Brands More Likely Garner Consumer Response to Their Online Advertising

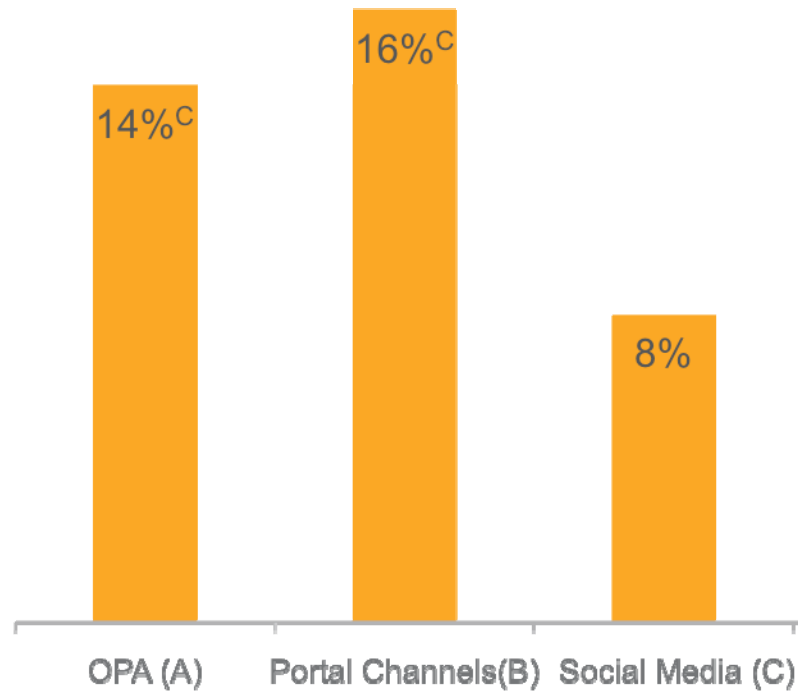
Correlations of .3 are fair



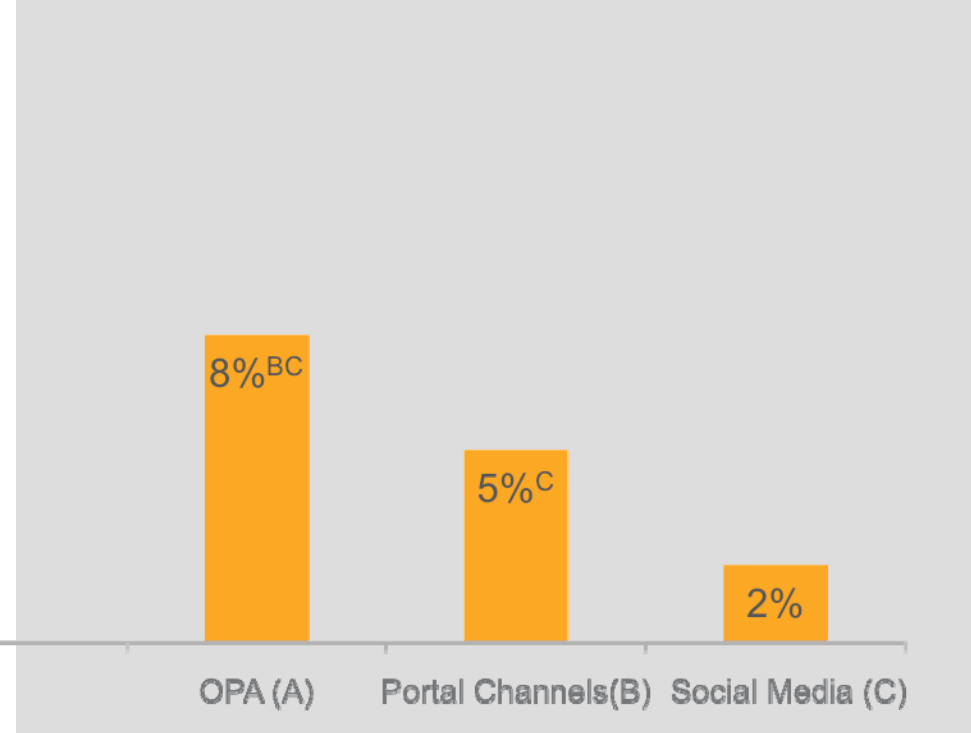


# Portal Channels More Likely to Lead to Search; Media Sites Impact Purchases

## 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



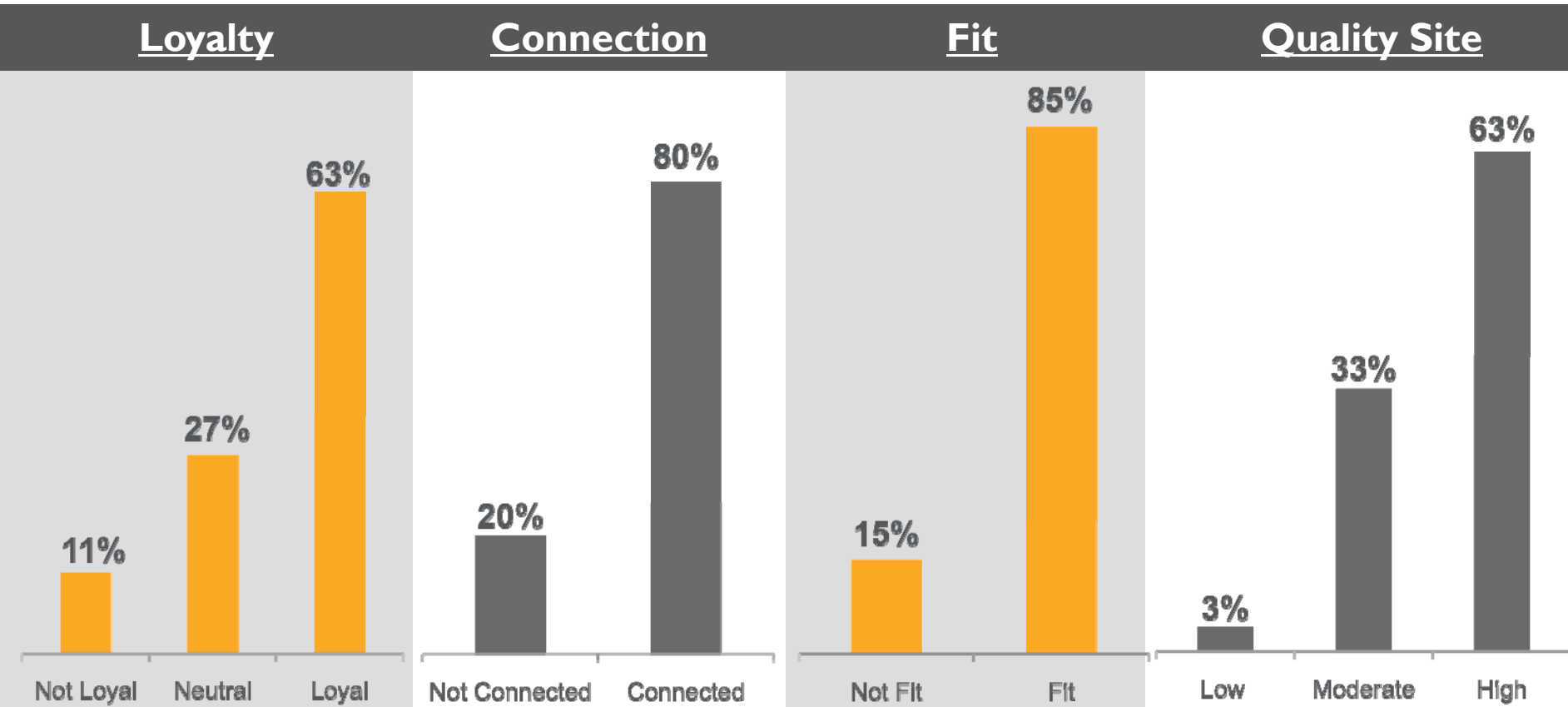
# Site Involvement & Ad Response

- 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)



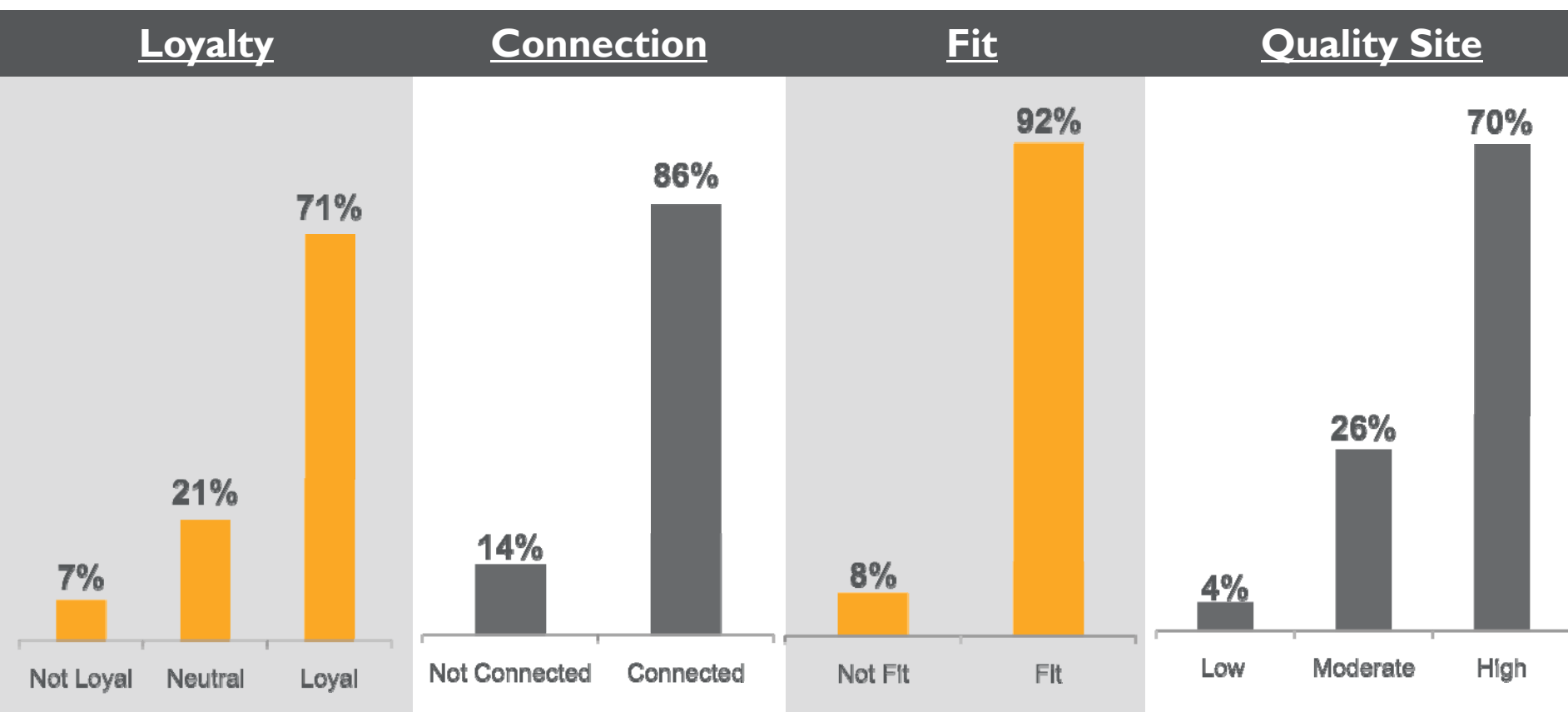
BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel , 493 Social Media)

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

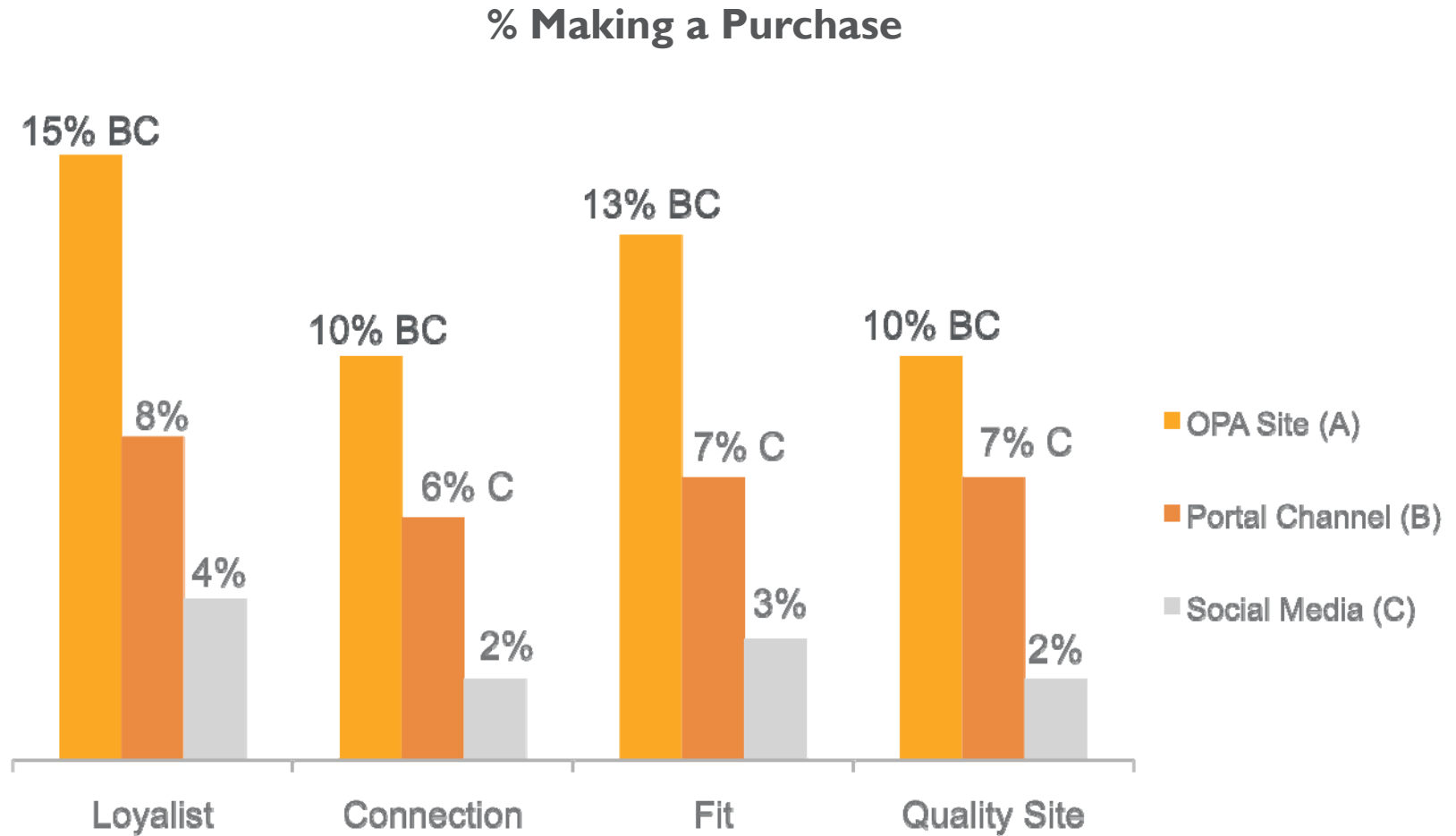


BASE: Site Ratings (N= 6222: 4185 OPA, 1544 Portal Channel, 493 Social Media)

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 (<sup>A,B,C</sup>) 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



# For More Information

## Research Questions:

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