



Dedicated to representing the highest standards in Internet publishing

Online Content – Attracting the Most Valuable Buyers

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Conducted in partnership with DJG Marketing

www.online-publishers.org

Online Publishers Association (OPA)

- The Online Publishers Association (OPA) is a not for profit industry 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 128.2 million unique visitors or 74% reach of the U.S. online population (comScore Media Metrix, July 2006)

Online Publishers Association (OPA)



Online Content & Buying Decisions

Research Objectives & Method

- To quantify the value of online audiences to understand which content sites provide the richest opportunities for marketers
- To assess value, we focus on online shopping and purchasing
- We compare the consumer behavior of visitors to
 - OPA member sites in the aggregate with portals and search engines
 - OPA member sites by content category (e.g., sports, entertainment) with their portal/search counterparts
- This study leverages the most recent Composition Index data from
 - @Plan Summer 2006 (US online adults)
 - MRI Spring 2006 (US adults)

Quantifying Audience Value – *Finding the Most Valuable Buyers*

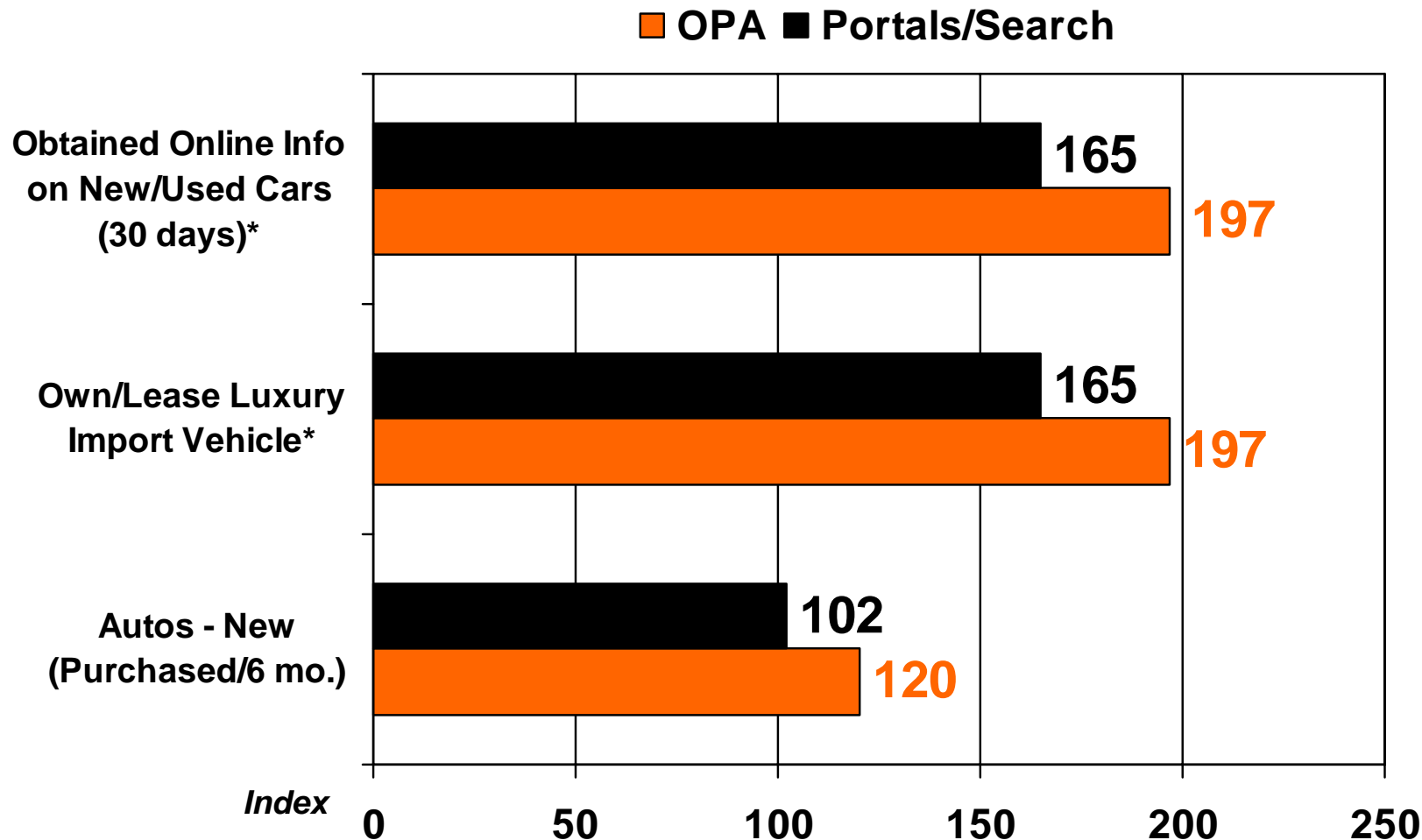
- This section quantifies online audiences purchasing behavior in important advertising categories
 - Automotive
 - Financial Services
 - Home & Real Estate
 - Technology
- Each category compares OPA members with portals and search engines
- Topline results are provided; more results are in the Appendix

Finding the Most Valuable Automotive Buyers

For Automotive, visitors to OPA members' sites...

- Research, shop for and buy new and used vehicles online
- More likely make related auto transactions and purchases online –
 - Insurance
 - Loans
 - Auto Parts
- Topline results are provided; more results are in the Appendix

OPA members reach consumers more likely to shop for and buy vehicles – *with indices about 20% greater*



Source: @Plan Summer 2006; Base: Online Adults

*MRI Spring 2006 US 18+

Finding the Most Valuable Buyers, by Content Category

In addition to looking at OPA sites and portals/search engines in the aggregate, we reviewed these groups by content vertical

- Automotive sites
- Business/Financial news sites
- Entertainment sites
- Health sites
- Information & Review sites
- Lifestyles sites
- Local news sites
- Sports sites

We divided OPA's membership by their content, and measured them against their portals/search engine counterparts

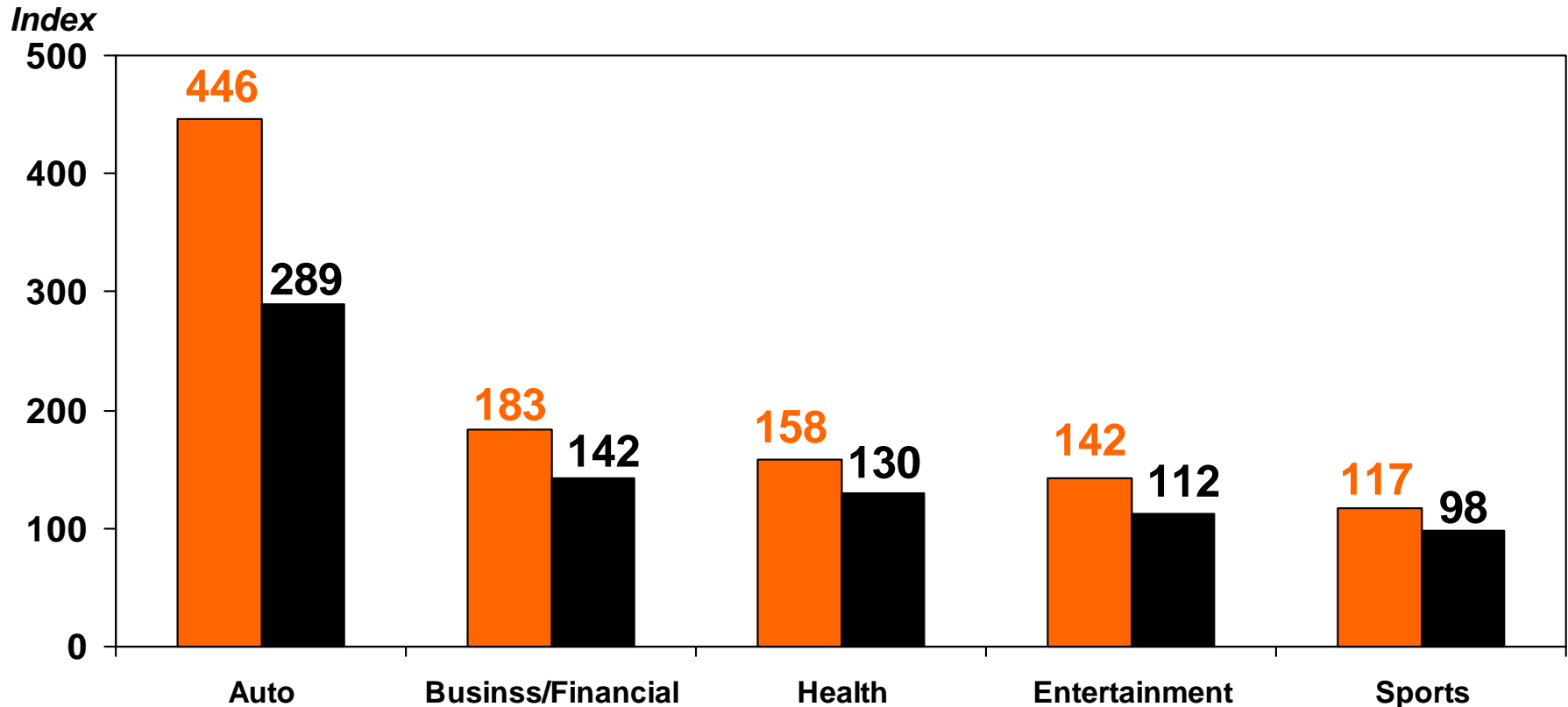
- For example, CBS Sportsline, ESPN, FoxSports, NASCAR, SI and Sporting News comprise the OPA Sports category and are compared with AOL Sports, Netscape Sports and Yahoo Sports

OPA sites and portals/search engines are listed by content category in Appendix B

New car buyers are more often found on OPA sites – *Auto, Business, Health, Entertainment & Sports*

Purchased New Automobiles (30 days), by Site Category
(@Plan Composite Indices)

■ OPA ■ Portals/Search

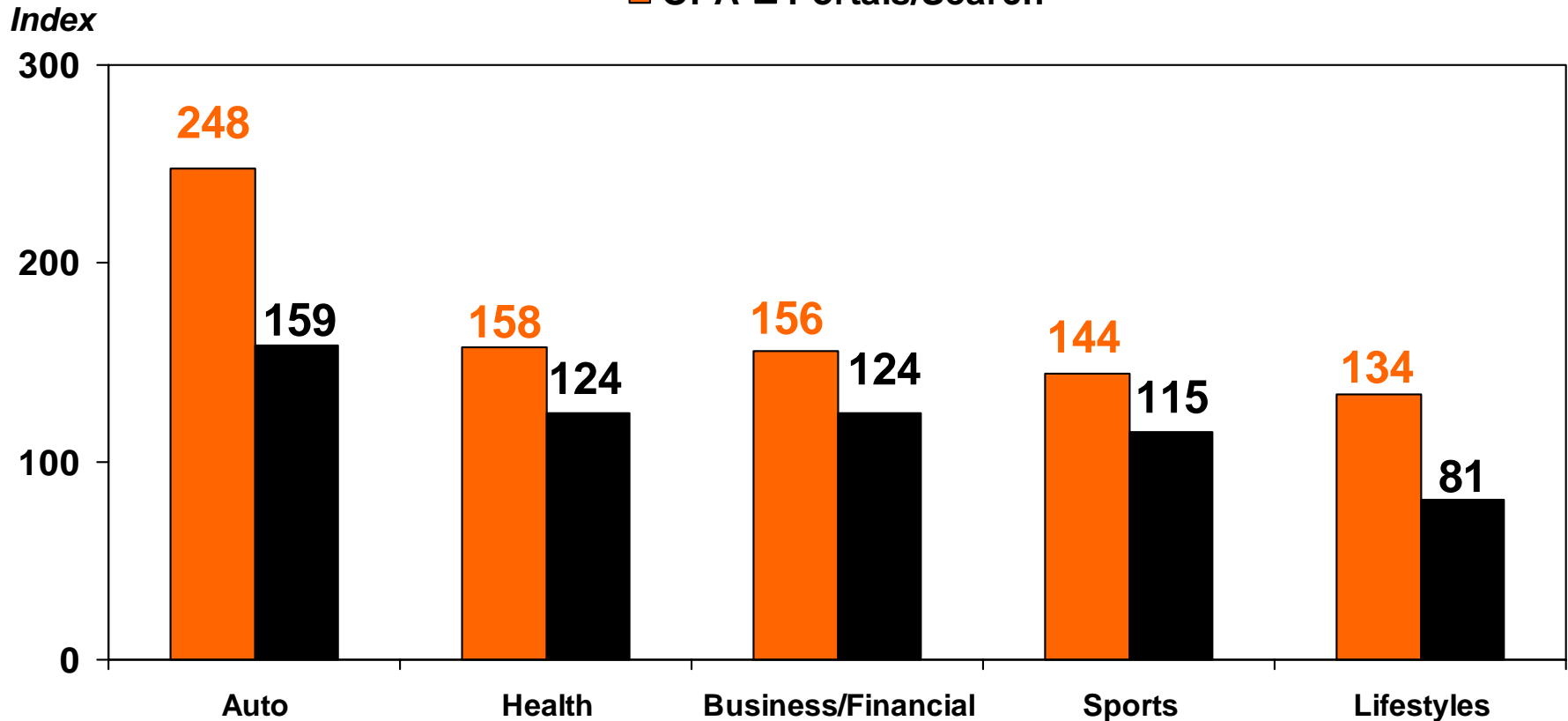


Source: @Plan Summer 2006

Car buys trigger related purchases – *OPA sites score 25% - 65% higher for auto loans*

Purchased Auto Loans (30 days), by Site Category
(@Plan Composite Indices)

■ OPA ■ Portals/Search



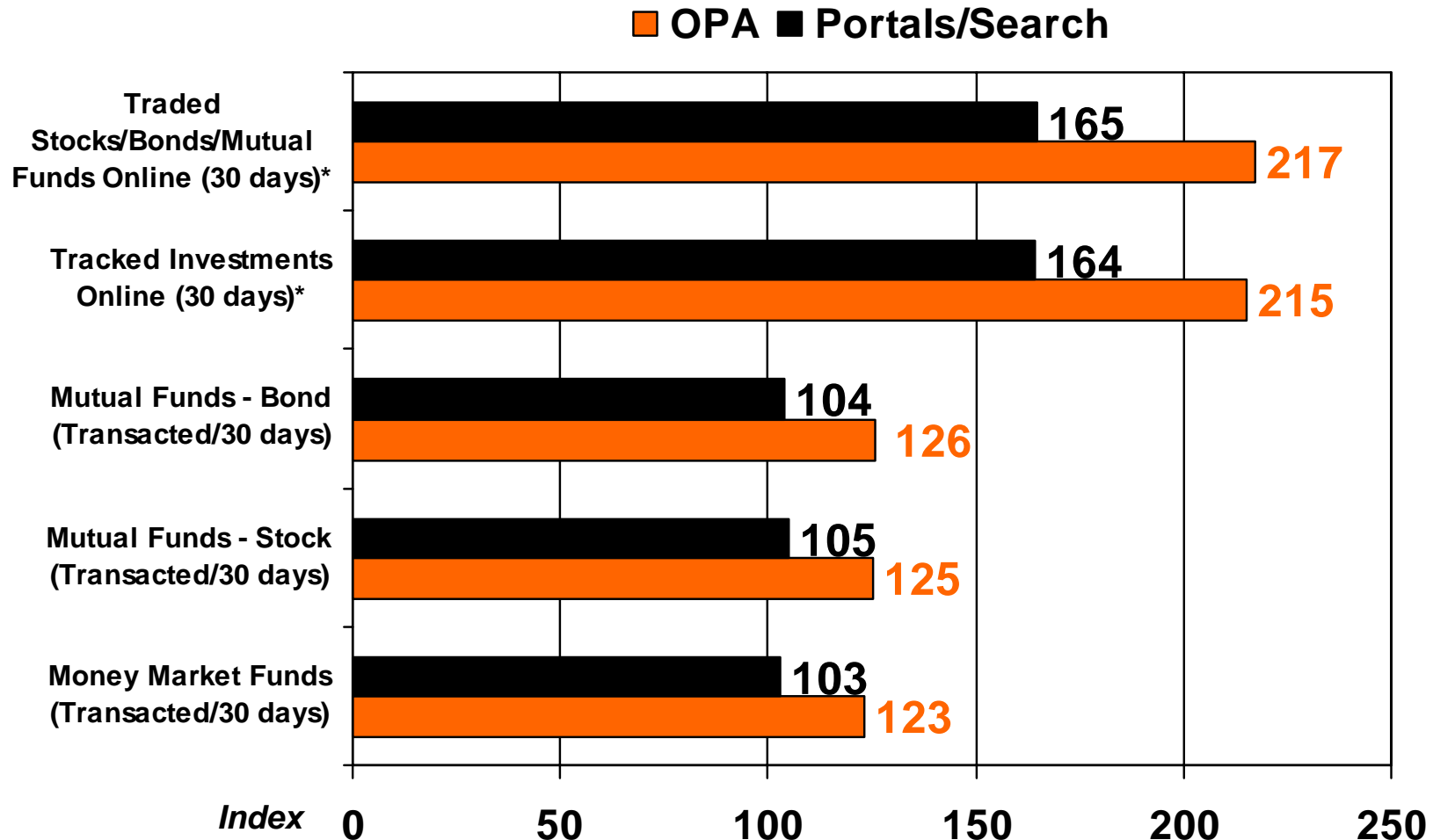
Source: @Plan Summer 2006

Finding the Most Valuable Financial Services Buyers

For Financial Services, visitors to OPA members' sites...

- Actively track and trade investments online, including
 - Stocks
 - Bonds
 - Money market accounts
- Frequently shop and purchase insurance online – auto, home, health, life
- Routinely get home mortgages and home equity loans online
- Are in the market for loans – auto, personal, student, small business
- **Topline results provided; more results are in the Appendix**

Visitors to OPA sites more often track and trade investments online – *with indices over 30% greater*

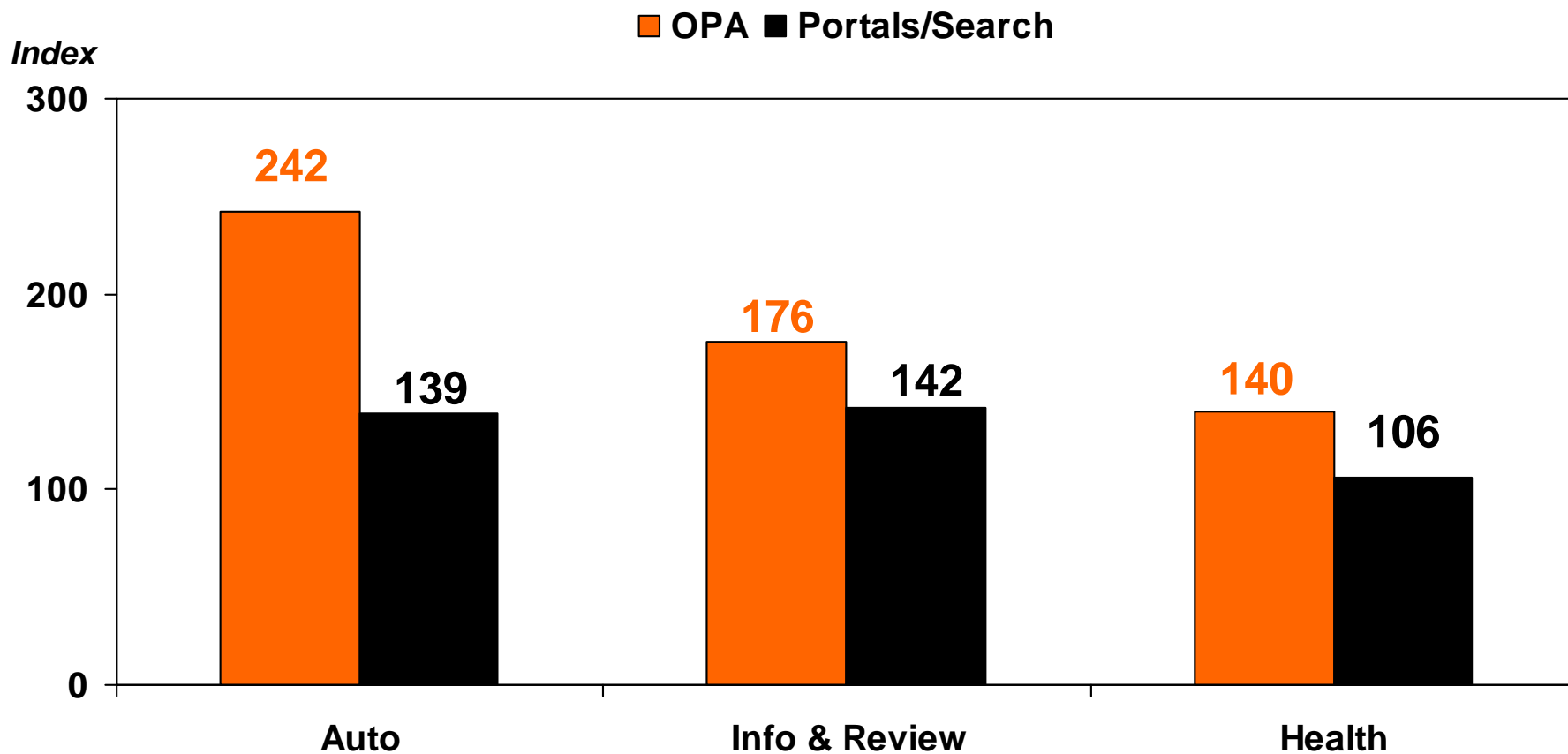


Source: @Plan Summer 2006; Base: Online Adults

*MRI Spring 2006 US 18+

More active investors frequent OPA sites – *sites as diverse as Auto, Info & Review and Health*

Any Online Investment Transaction (30 days), by Site Category
(@Plan Composite Indices)



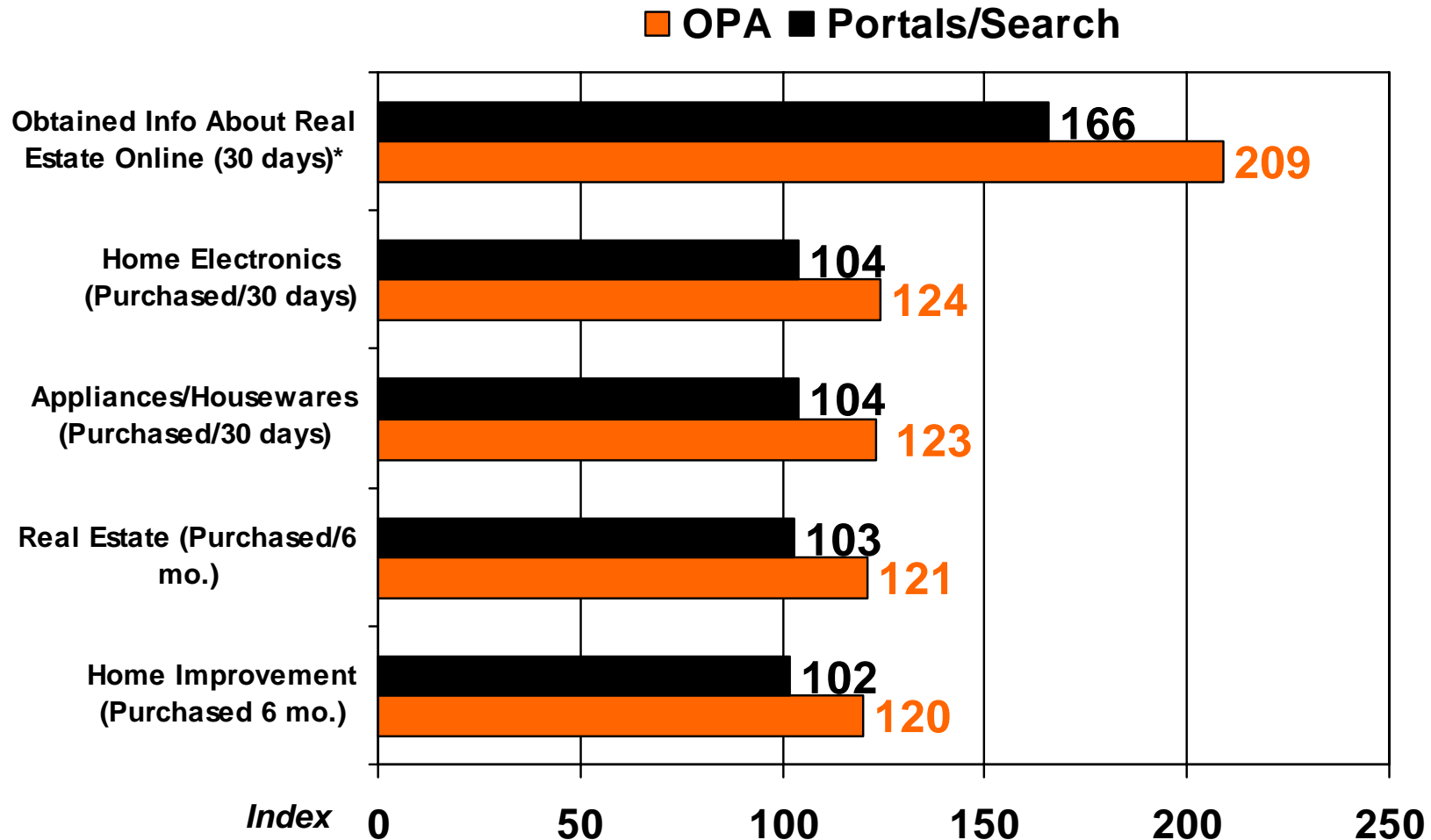
Source: @Plan Summer 2006

Finding the Most Valuable Home & Real Estate Buyers

For Home & Real Estate, visitors to OPA members' sites...

- Consistently search for and purchase real estate online, and with real estate comes a slew of related online shopping and buying
 - Home improvement products, equipment and services
 - Appliances and housewares
 - Home electronics
 - Furniture and accessories
- Often stock their refrigerators and medicine cabinets (prescription & OTC) with goods researched for and bought online
- Frequently consume online info on family, health and fitness
- **Topline results provided; more results are in the Appendix**

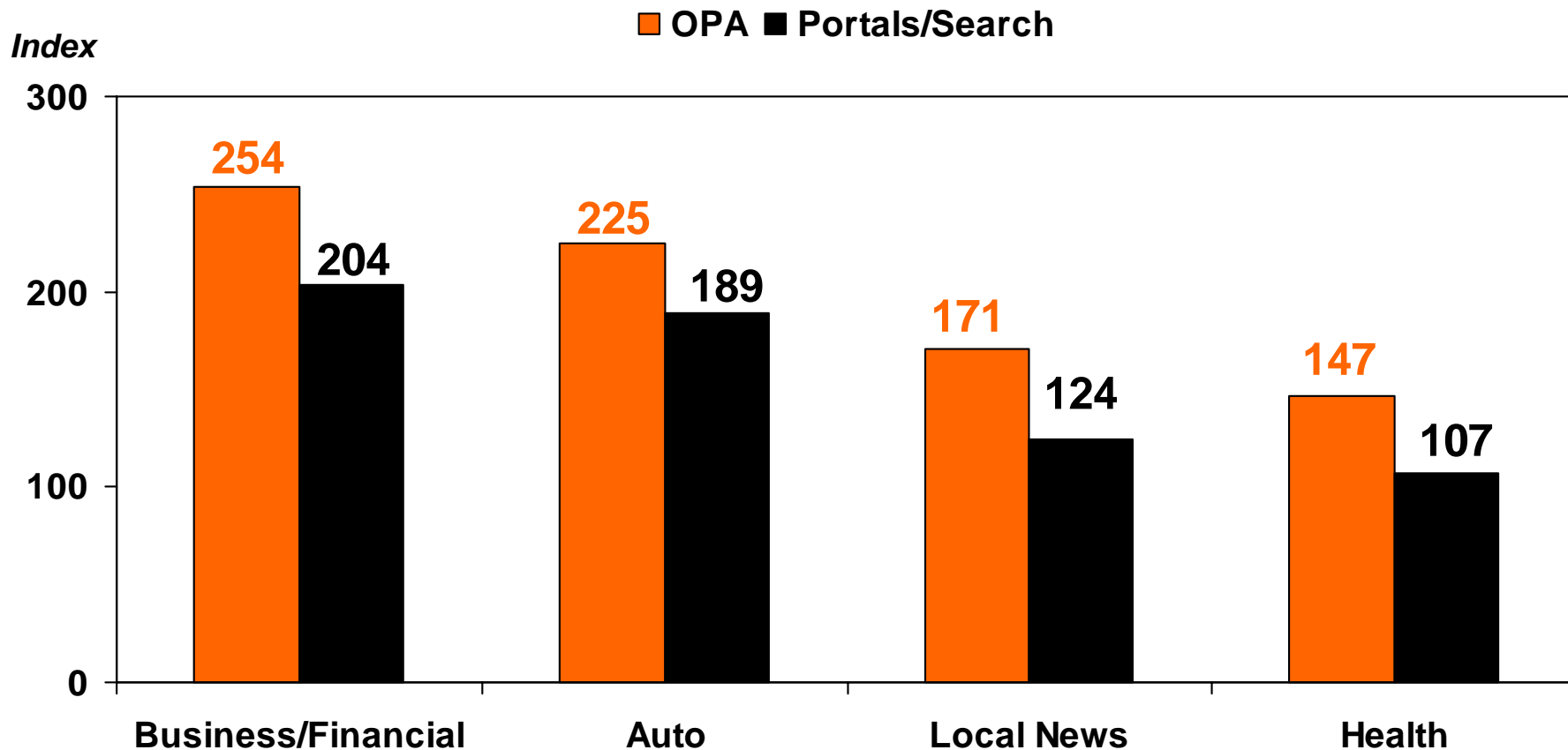
OPA audiences more often buy real estate and related home products – *with index scores about 20% higher*



Source: @Plan Summer 2006; Base: Online Adults
*MRI Spring 2006 US 18+

Real Estate buyers are consistently on OPA sites – *with index scores about 20 – 40% greater*

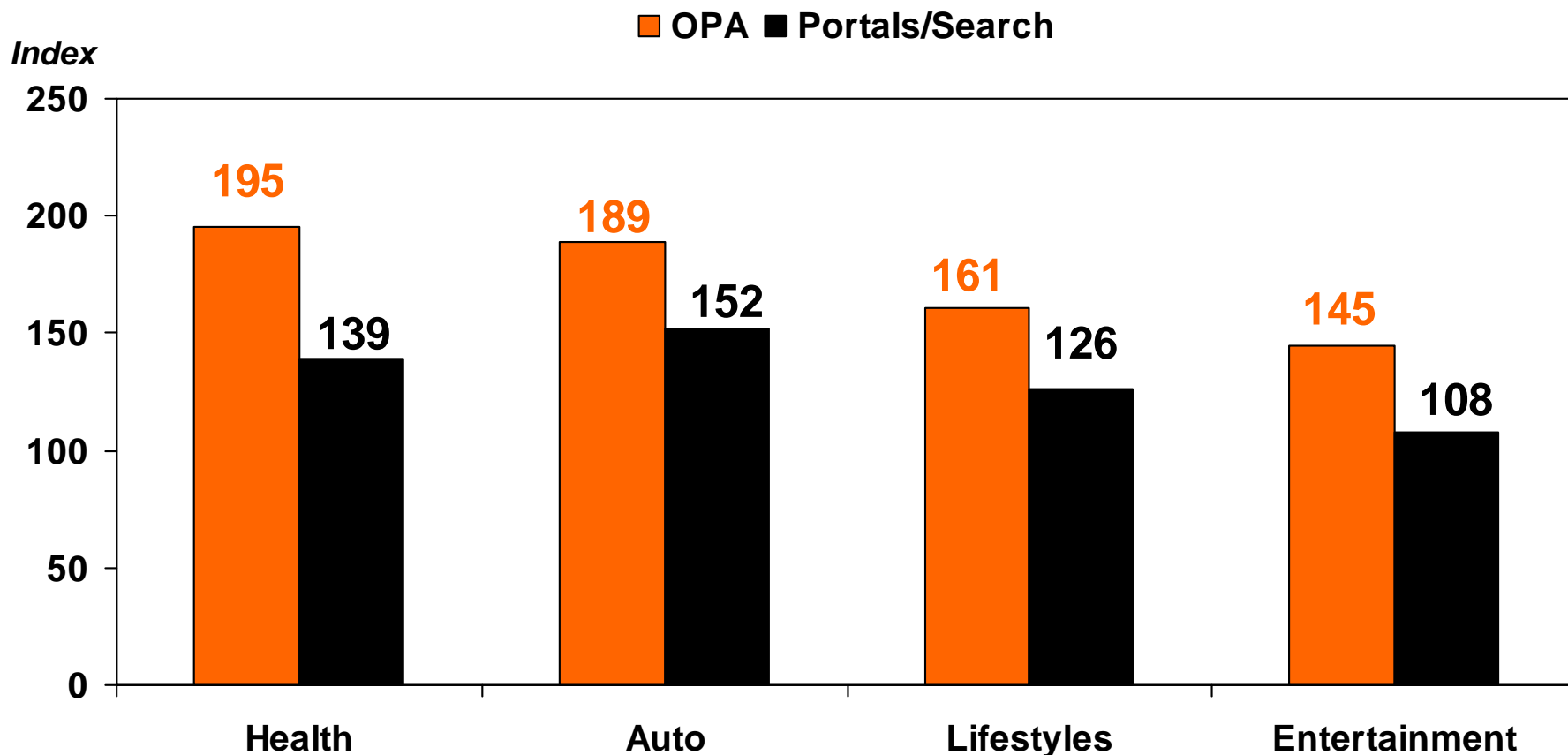
Purchased Real Estate (6 months), by Site Category
(@Plan Composite Indices)



Source: @Plan Summer 2006

Real estate leads to related buys – *home improvement buying indices are 25 – 40% more for OPA sites*

Purchased Home Improvement (6 months), by Site Category
(@Plan Composite Indices)



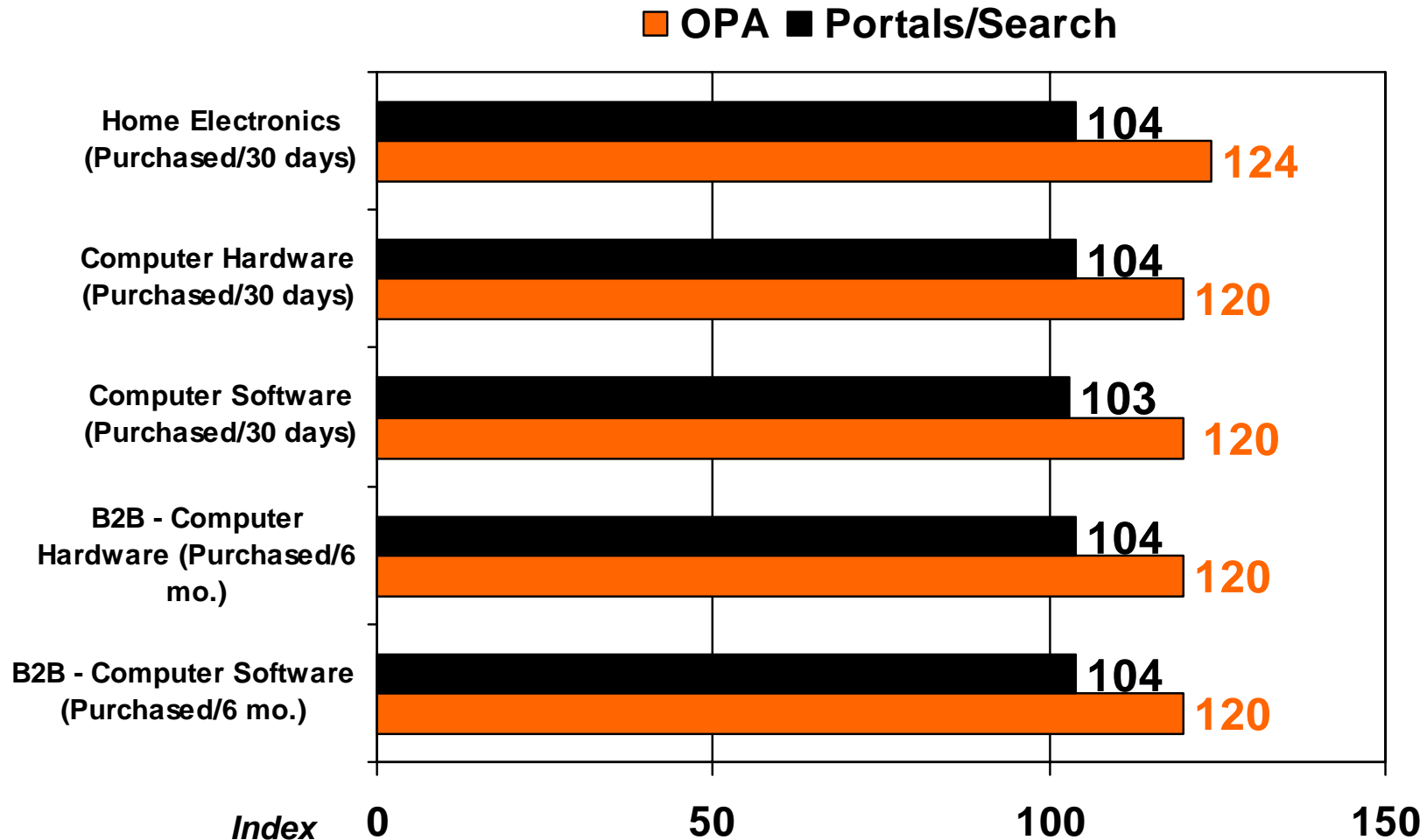
Source: @Plan Summer 2006

Finding the Most Valuable Technology Buyers

For Technology, visitors to OPA members' sites...

- Are more likely to buy computer hardware and software
 - These computer and computer-related purchases are for home and the workplace
- OPA member audiences more often purchase home electronics
- Topline results provided; more results are in the Appendix

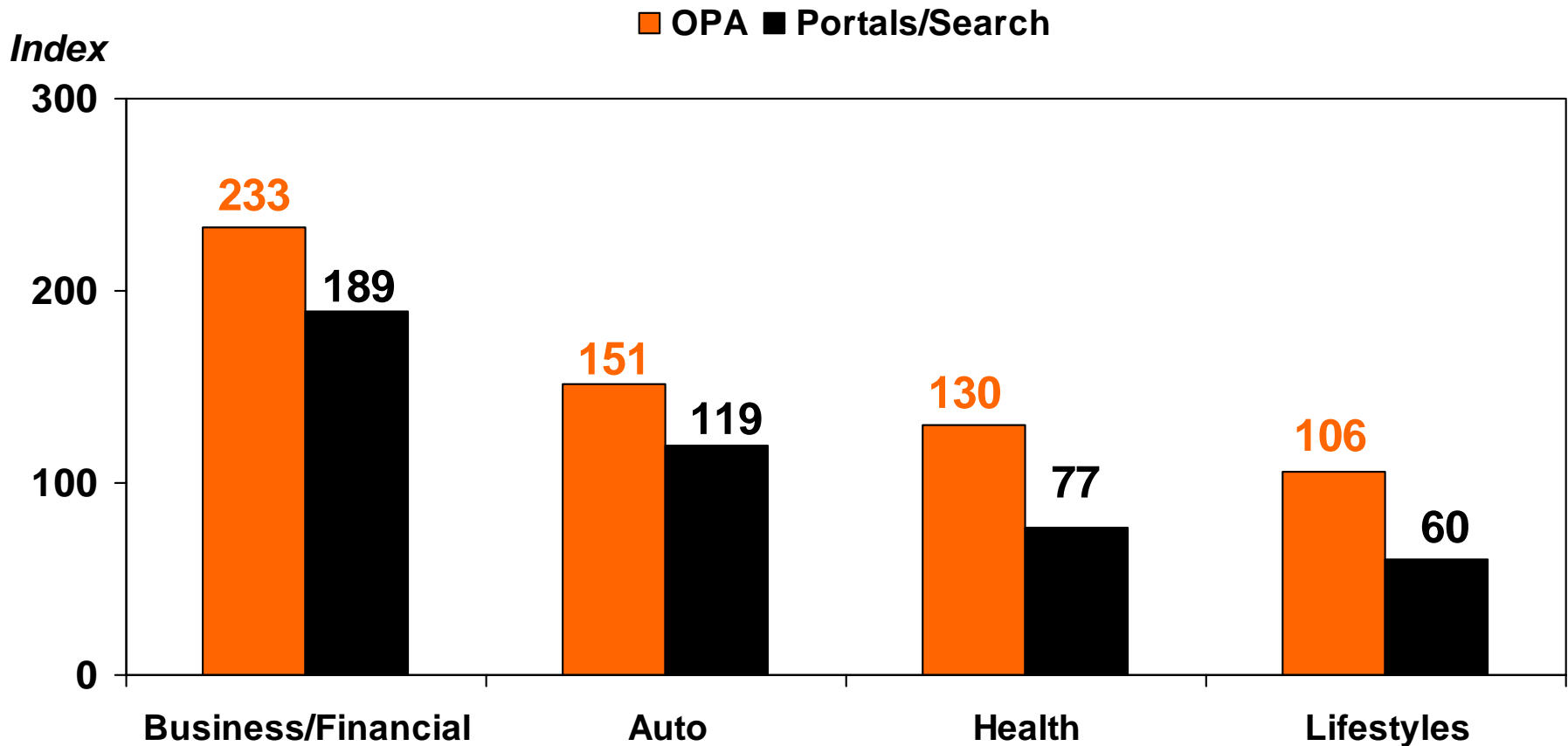
OPA sites attract more tech buyers – B2C & B2B – *with indices about 20% greater*



Source: @Plan Summer 2006; Base: Online Adults

OPA audiences spend more on technology - *with indices about 25% to 75% greater*

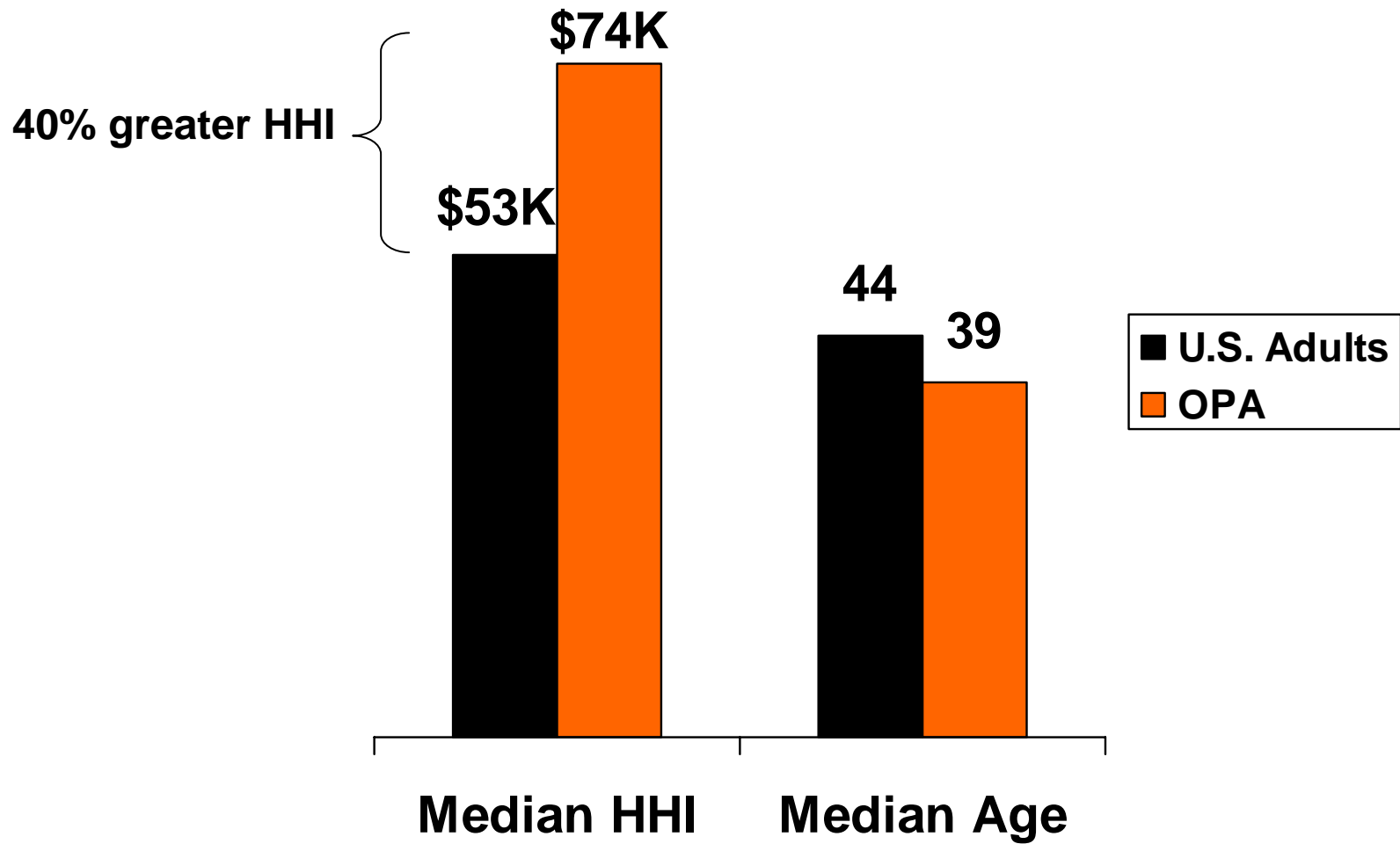
Computer Hardware – Heavy Spending (6 months), by Site Category
(@Plan Composite Indices)



Source: @Plan Summer 2006

Demographics

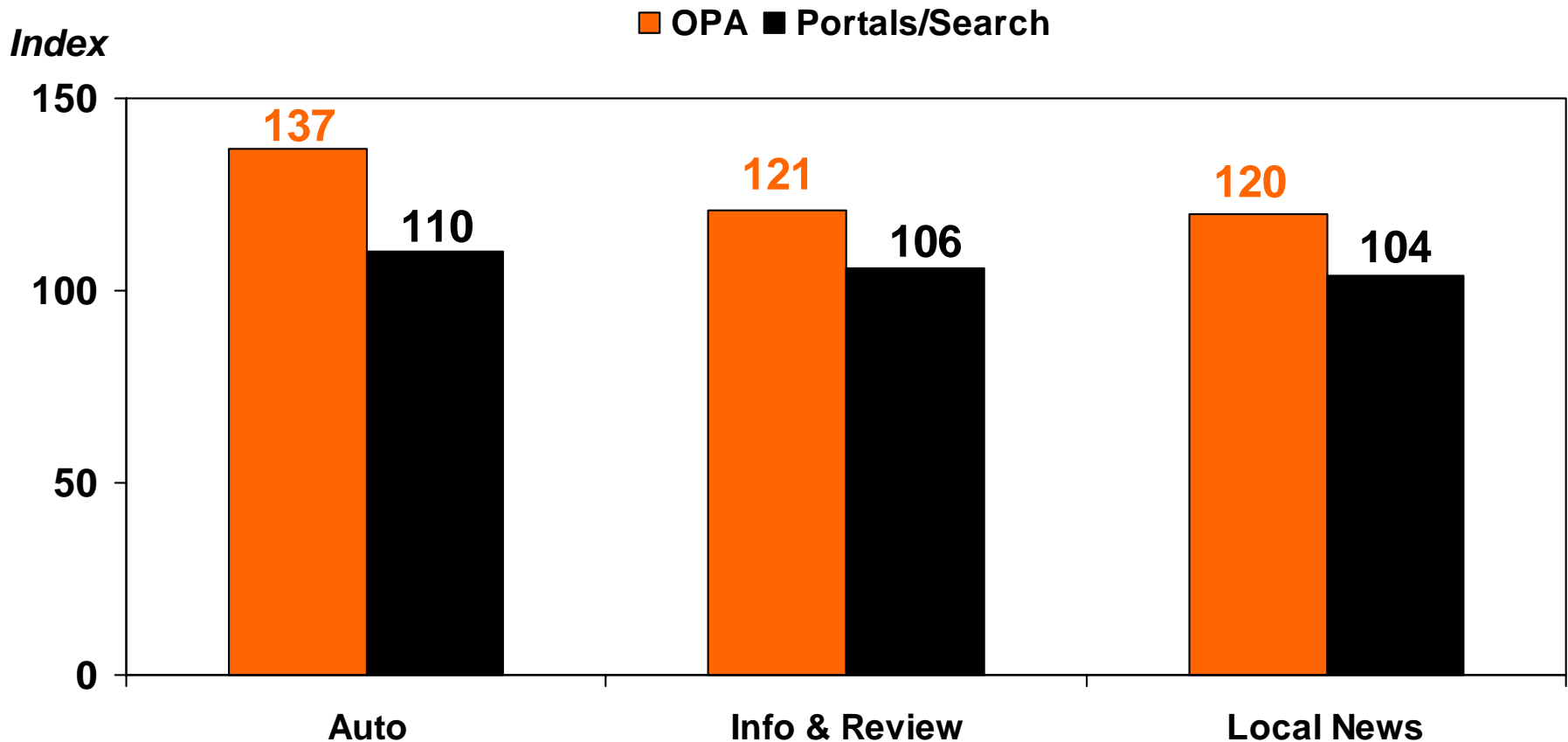
OPA Members Have Younger, Higher Income Audiences



Source: MRI Spring 2006 US Adults 18+

OPA sites attract more high income visitors across a variety of content

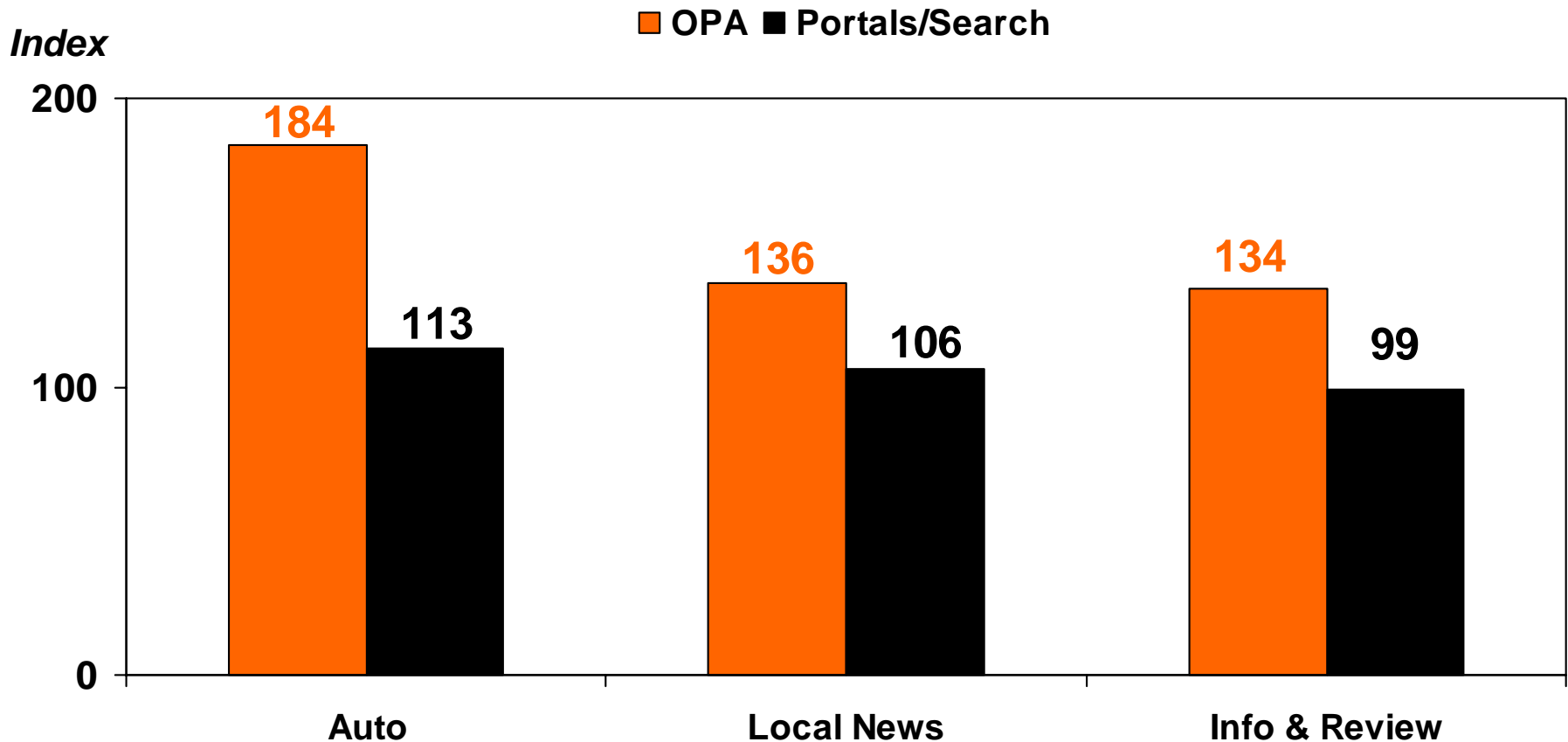
HHI \$75K+, by Site Category
(@Plan Composite Indices)



Source: @Plan Summer 2006

OPA sites attract more high income visitors across a variety of content

HHI \$150K+, by Site Category
(@Plan Composite Indices)

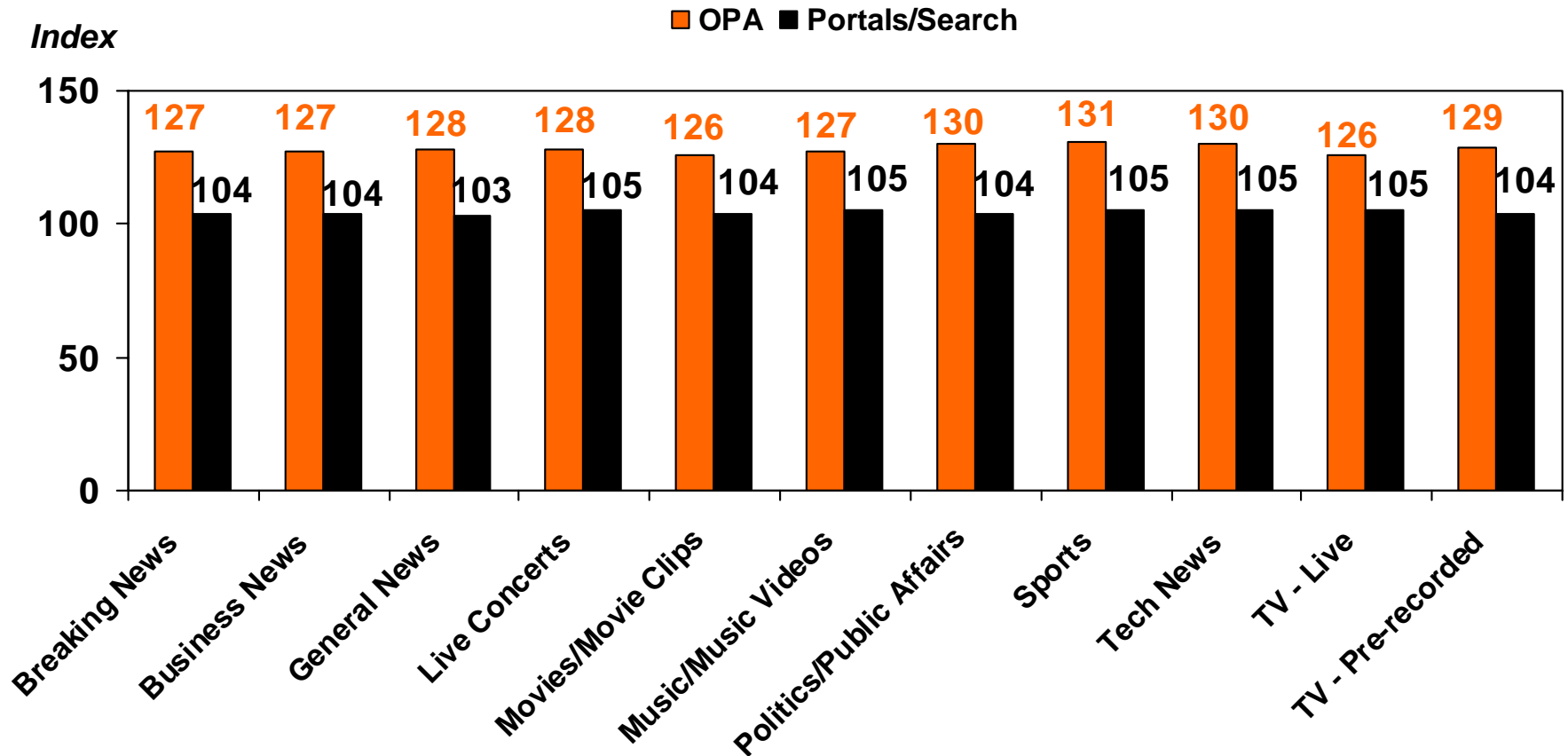


Source: @Plan Summer 2006

Online Video Viewing – An Indicator of Online Content Consumption

OPA site visitors consume more content – *20%+ higher indices across video categories*

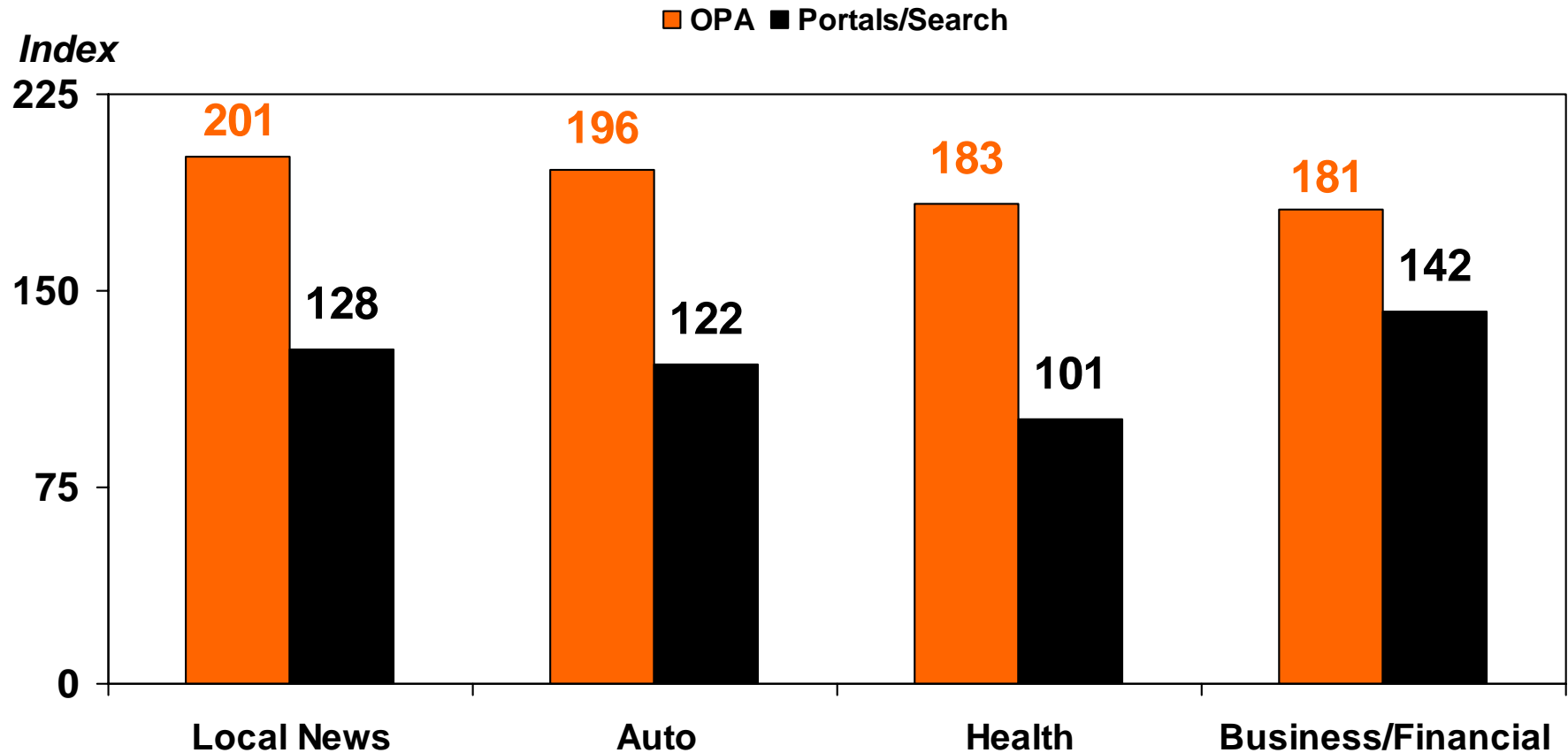
Viewing Online Videos, by Video Content Category
(@Plan Composite Indices)



Source: @Plan Summer 2006

Visitors to OPA sites more frequently pay for content – *paid content indices are 25 - 80% higher*

Online Paid Subscription – Streaming Video/Audio, by Site Category
(@Plan Composite Indices)



Source: @Plan Summer 2006

Compared to the Portals & Search, *Visitors to OPA Sites...*

- Frequently purchase big-ticket items online (real estate, autos) and related goods and services (home electronics, auto loans)
- View more online videos and therefore respond more often to online video advertising
- Have demographics in high demand by advertisers
- Represent a more valuable audience, in richer advertising environments

Appendix A

OPA Members & Portals/Search Engines Sites

OPA & Portals/Search Roll-ups: @Plan

OPA

- ABC.com
- ABCNews.com
- About
- AllBusiness
- Bankrate.com
- Belo Interactive
- Brides.com
- BusinessWeek Online
- CBS Digital Media
- CNBC.com
- CNET Networks
- CNN.com
- CondeNet
- ConsumerReports.org
- Cox Enterprises
- Discovery.com
- DowJones Online
- edmunds.com
- ESPN.com
- Forbes.com
- Fox.com
- FoxNews.com
- Gannett
- Health Central Network
- howstuffworks
- Inc/Fast Company
- InternetBroadcasting
- iVillage
- Jupitermedia
- marthastewart.com
- McClatchy Interactive
- Media General
- Meredith Corporation
- MSNBC.com
- MTV.com
- NASCAR.com
- nytimes.com
- Reuters
- Rodale
- Scripps Networks
- Slate
- SportingNews.com
- TimeInc.Interactive
- Tribune Interactive
- USAToday.com
- Walt Disney Internet Group
- Washingtonpost.Newsweek Interactive
- weather.com
- WeatherBug

Portals/Search

- AOL
- Google
- Lycos
- MSN
- Netscape
- Yahoo

OPA & Portals/Search Roll-ups: MRI*

OPA

- ABC.com
- Bankrate.com
- CBS.com
- CBS Sportsline
- CNET.com
- CNN.com
- Disney.com
- ESPN.com
- Fox.com
- FoxNews.com
- FoxSports.com
- iVillage.com
- MSNBC.com
- MTV.com
- NYTimes.com
- USAToday.com
- weather.com
- WeatherBug
- WSJ.com

Portals/Search

- AOL
- Ask
- Excite
- Google
- Hotmail
- Lycos
- MSN
- Netscape
- Yahoo

**Note: MRI tracks many but not all OPA member sites*

Appendix B

OPA & Portals/Search Engines Sites By Content Vertical

Auto Sites

OPA

- About Autos
- CNN Autos
- Edmunds.com
- ForbesAutos.com

Portal/Search

- AOL Autos
- MSN Autos
- Netscape Autos
- Yahoo Autos

Note: @Plan tracks many but not all OPA member and portal channels

Business/Financial News Sites

OPA

- About Business & Finance
- AllBusiness.com
- Bankrate.com
- Business2.com
- Businessweek.com
- CNBC.com
- FastCompany.com
- Forbes.com
- Fortune.com
- Inc.com
- Marketwatch.com
- Reuters.com
- WSJ.com

Portals/Search

- AOL Money & Finance
- Google Finance
- MSN Money
- Netscape Money
- Yahoo Finance
- Yahoo Small Business

Note: @Plan tracks many but not all OPA member and portal channels

Entertainment Sites

OPA

- ABC.com
- About Entertainment
- Astrology.com
- Boxerjam.com
- CBS.com
- CMT.com
- CNET Networks Entertainment
- Discovery Communications
- Disney.com
- Disney DVD & Video
- Disney Pictures
- EW.com
- FamilyFun.com
- Gox.com
- Gamespot
- Gurl.com
- MetaCritic.com
- Movies.com
- MP3.com
- MTV.com
- People.com
- Soapnet.com
- TV.com
- TheEnvelope.com
- VH1.com

Portals/Search

- AOL Celebrity News
- AOL Entertainment
- AOL Games
- AOL Horoscopes
- AOL Movies
- AOL Music
- Lycos Entertainment
- Lycos Horoscopes
- Lycos Movies
- Lycos Music
- MSN Astrology
- MSN Entertainment
- MSN Movies
- MSN Music
- MSN TV
- MSN Video
- Netscape Celebrities
- Netscape Movies
- Netscape Television
- Netscape Video Games
- Yahoo Astrology
- Yahoo Entertainment
- Yahoo Movies
- Yahoo Music
- Yahoo Video

Note: @Plan tracks many but not all OPA member and portal channels

Health Sites

OPA

- About Health & Fitness
- HealthCentersOnline
- Healthology
- Health Central Network
- MensHealth.com
- Prevention.com
- WomensHealth.com

Portals/Search

- AOL Diet & Fitness
- AOL Health
- MSN Health & Fitness
- Netscape Health & Fitness
- Yahoo Health

Note: @Plan tracks many but not all OPA member and portal channels

Information & Review Sites

OPA

- About.com
- CNET Reviews
- howstuffworks
- ConsumerReports.org
- Jupitermedia

Portals/Search

- Google Science & Technology
- MSN Tech & Gadgets
- Netscape Gadgets
- Netscape Technology
- Yahoo Tech

Note: @Plan tracks many but not all OPA member and portal channels

Lifestyles Sites

OPA

- About Food & Drink
- About Home & Garden
- About Parenting & Family
- About Style
- AmericanBaby.com
- Backpacker.com
- BestLife.com
- BHG.com
- Bicycling.com
- Brides.com
- Child.com
- CoastalLiving.com
- Concierge.com
- CookingLight.com
- CountryHome.com
- DesignFinder.com
- DIYNetwork.com
- ElegantBride.com
- Epicurious.com
- FamilyCircle.com
- FitnessMagazine.com
- FoodTV.com
- GardenWeb.com
- HealthyKids.com
- HGTV.com
- HGTVPro.com
- InStyle.com
- iVillage.com
- iVillageParentingNetwork
- LHJ.com
- MarthaStewart.com
- Men.Style.com
- MidwestLiving.com
- ModernBride.com
- More.com
- MountainBike.com
- OrganicGardening.com
- Parenting.com
- Parents.com
- RealSimple.com
- RunnersWorld.com
- SouthernAccents.com
- SouthernLiving.com
- Style.com
- TraditionalHome.com

Portals/Search

- AOL Food & Home
- AOL Living
- AOL Parenting
- MSN Lifestyle
- Netscape Family
- Netscape Food & Travel

Note: @Plan tracks many but not all OPA member and portal channels

Local News/Current Events Sites

OPA

- About Cities & Towns
- Belo Interactive
- Boston.com
- Cox Enterprises
- Gannett
- Internet Broadcasting Systems
- McClatchy Interactive
- Media General
- NYTimes.com
- New York Times Regional Media Group
- Scripps
- Tribune Interactive
- WashingtonPost.com

Portals/Search

- AOL City Guide
- MSN City Guides
- Yahoo Local
- Yahoo Local News

Note: @Plan tracks many but not all OPA member and portal channels

Sports Sites

OPA

- **CBS Sportsline.com**
- **ESPN.com**
- **FoxSports.com**
- **NASCAR.com**
- **SI.com**
- **SportingNews.com**

Portals/Search

- **AOL Sports**
- **Netscape Sports**
- **Yahoo Sports**

Note: @Plan tracks many but not all OPA member and portal channels

For More Information, Contact

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