

The OPA White Papers

The Existence and Characteristics of Dayparts on the Internet

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 **online publishers association**

Executive Summary

This paper provides evidence to support the conclusion that five distinct dayparts exist on the Internet. Each of these dayparts displays significant differences in usage levels, demographics, and type of content accessed. Media planners can improve the efficiency of their ad buys by weighting them toward those dayparts during which their target audiences predominate.

Key findings of this paper include:

- There are five distinct Internet dayparts characterized by differing usage levels, demographics and type of content accessed:
 1. Early morning (M-F 6am – 8am)
 2. Daytime (M-F, 8am – 5pm)
 3. Evening (M-F, 5pm – 11pm)
 4. Late night (M-F, 11pm – 6am)
 5. Weekends (Sat-Sun, all day)
- Daytime is the largest daypart (measured in terms of both total audience and total usage minutes), followed by Evening and Weekends;
- Affluent, working people between the ages of 25-54 make up a larger share of the Daytime audience than any other daypart;
- Children under the age of 18 are three times more likely to be reached during the Evening and Weekend dayparts;
- Internet utilities such as search engines, e-mail and chat show little variation in usage by daypart; online content sites, in contrast, exhibit distinct differences in usage by time of day;
- Use of News and Information sites is concentrated in the Early Morning and Daytime dayparts;
- Entertainment/Sports site usage increases dramatically during Evening and Weekend dayparts compared to Daytime;
- On average, eCommerce activity accounts for only 5.3% of time spent online; a considerably larger share occurs on Evenings and Weekends than during the Daytime.

This paper utilizes Nielsen//NetRatings usage data for September 2002.

Introduction: Defining Dayparts

A daypart is a consecutive block of time on similar days (weekdays or weekends) during which the size of the audience is homogeneous as is the characterization of the group using the medium. For example: The size of the Daytime television audience is smaller than that of Prime Time. This is logical given the number and type of people able to watch television from Home, versus those unable to watch due to work or school. Furthermore, Daytime television is characterized by a large proportion of women watching TV. Granted, a quick description of a daypart's audience may not accurately describe every audience member, but it does describe the bulk of the people who would receive an advertising message presented during that time.

Until now, Internet media planning has been characterized by overall site reach, demographics and content affinity without particular regard for how audience dynamics change by time of day. If Internet dayparts do indeed exist, then media buyers can improve the efficiency of their plan by incorporating this additional targeting dimension.

This paper answers the question: "Are there truly dayparts on the Internet?" In other words, does the Internet have blocks of time characterized by similar usage levels and similar users, or is the Internet industry merely trying to force some form of structure onto a chaotic environment?

It is reasonable to hypothesize that dayparts on the Internet do not exist because: 1) people can access the Internet from virtually anywhere at any time; 2) site content is available 24 hours a day, seven days a week, and 3) programming is not restricted to certain times of day. If dayparts don't exist online, we should expect usage levels, demographic composition, and content viewed to be relatively consistent irrespective of time of day.

Therefore, let's say that Internet dayparts exist if at least two of the following three conditions are satisfied:

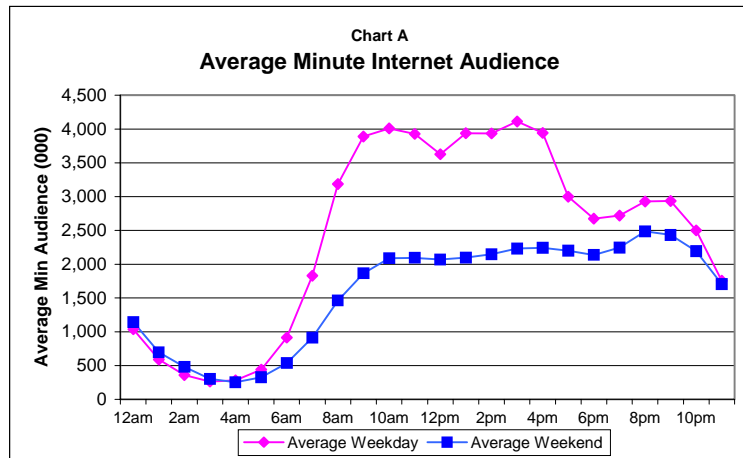
1. Usage levels amongst consecutive hours are comparable, can be easily separated into time blocks (or dayparts) and display very different usage levels when compared to one another;
2. Audience composition differs by daypart;
3. Content usage, as a percentage of total usage, differs by daypart.

This paper focuses on online publishing sites, examining the usage of these sites. (A description of the methodology used can be found in Appendix A.)

Proof that Dayparts Exist on the Internet

Do usage levels of the Internet vary throughout the day? Absolutely. As seen in Chart A¹, weekday usage peaks from 10am to 5pm, with a dip from Noon to 1pm. The lowest levels of usage occur between 2am and 5am. Weekend usage follows the same pattern, with the lowest levels of usage from 11pm to 6am. However, during the day, usage levels are only half as much as on weekdays (2 million versus 4 million users per minute), and show little change throughout the day.

There was minimal difference by day of week, varying by less than 5%. However, beginning Friday evening at 5pm, usage undergoes a sharp decline – 19% less than at that same time Monday through Thursday.



Source: Nielsen/NetRatings

¹ For an explanation of Average Minute Internet Audience, see Appendix A.

There are Five Distinct Internet Dayparts

It is helpful to examine Home and Work usage patterns separately to understand the fluctuation in weekday usage levels, shown in Chart B. Usage levels increase significantly, at a rate of 136% per hour, from 6am to 10am, driven by people arriving at and logging on from work. The overall 8% dip from 12noon to 1pm is driven by an 11% drop in work usage, presumably due to lunch. Work usage drops off considerably at 5pm.

On weekdays, Home usage slowly increases during the day at a rate of 1% per hour from 9am to 3pm, and then increases quickly from 3pm to 5pm as kids get home from school.

Beginning at 5pm, Home usage exceeds Work usage, peaking from 8pm to 10pm. Each weekday shows similar patterns and similar usage levels. Based on the usage levels, we can easily create five discernible dayparts, as shown in Chart C:

Early Morning: Monday-Friday, 6am to 8am. An average of 1.38 million U.S. users are on the Internet each minute during this time.

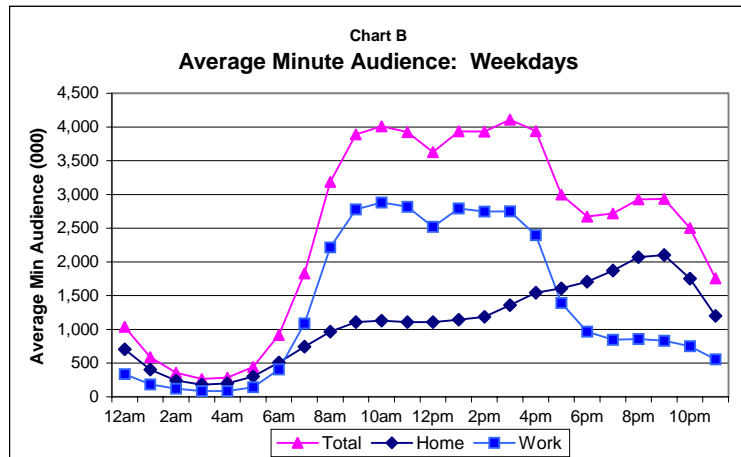
Daytime: Monday-Friday, 8am to 5pm, when usage peaks. The 3.84 million users per minute, on average, is driven mainly by users at work.

Evening: Monday-Friday, 5pm to 11pm, when the majority of Internet usage is from Home, with 2.79 million users per minute.

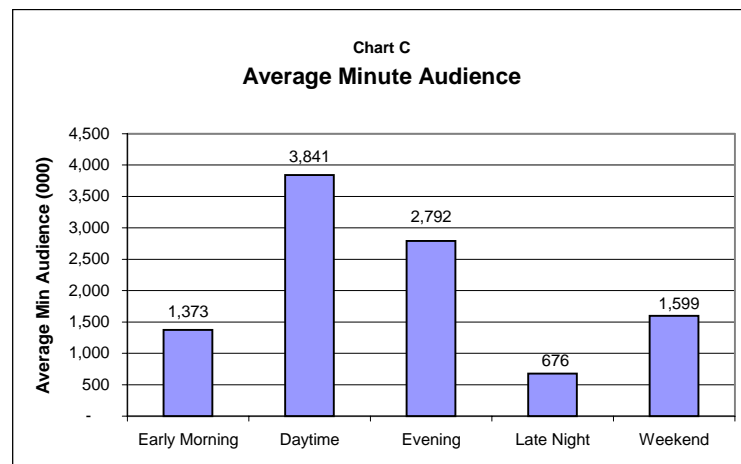
Late Night: Monday-Friday, 11pm to 6am, with minimal usage at only 676,000 users per minute.

Weekend: Saturday-Sunday, all day, with almost 1.6 million users per minute.

Chart C shows the average number of people (U.S. users) that can be reached via the Internet during any minute within the daypart.



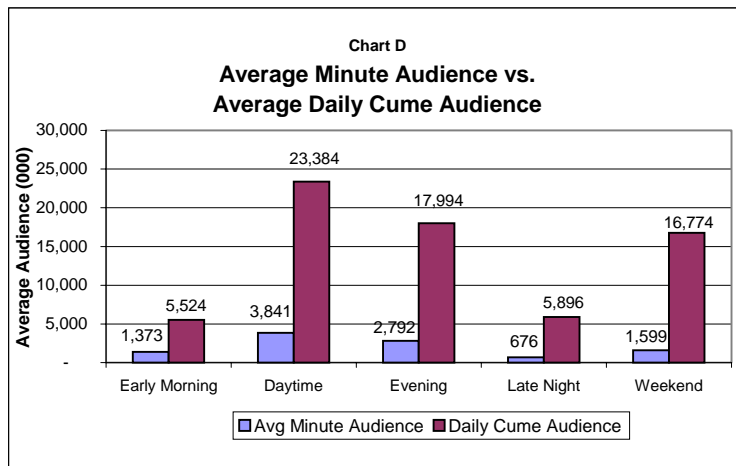
Source: Nielsen/NetRatings



Source: Nielsen/NetRatings

Cumulative Reach by Daypart

How big is the Internet audience by daypart? Put differently, if a media planner constructed a plan so that each person accessing the Internet during a given daypart received at least one ad exposure, how many people could be reached? The answer to this question is the Cumulative Reach by Daypart.



Cumulative Reach (also referred to as Daily Cume), is defined as the total *daily* unduplicated audience by daypart. Daily Cume is a sensible metric for planning daypart buys on the Internet, for unlike television, where advertisements unspool in real time, Internet media placements persist throughout the daypart. The opportunity to see a message is not constrained by the minute because users can access site content on demand. Thus, we would anticipate

that as Internet planning evolves to embrace daypart targeting, the buys will be “by daypart” rather than “by minute” (or, more accurately, by multiples of quarter minutes), as they are in television. Chart D shows the average daily cume audience for each of the five Internet dayparts in comparison to the average minute audience. This chart further demonstrates the significance and size of the Daytime daypart. By measures of total time spent online as well as total audience size, Daytime is truly primetime on the Internet.

Recent studies of Internet dayparts, including a report by MORI research², have suggested that the Daytime daypart may be further divided into three sub-segments: 8am – 11am; 11am – 1pm; and 1pm – 5am. Additionally, a current Online Publishers Association study being conducted by Millward Brown Intelliquest is delving more deeply into the daytime usage characteristics of the Internet audience. Results of this study are expected in early in the second quarter of 2003.

² The MORI research report entitled *Online Dayparting: Claiming the Day, Seizing the Night* can be found through the Online Publishers Association Web site at http://online-publishers.org/naa_daypart_report.pdf.

Audience Composition Varies by Daypart

Chart E shows the proportion of Home versus Work throughout the month, as well as the breakdown of Home versus Work users by daypart. It has already been demonstrated (see Chart B on page 6) that Weekday audience dynamics can be completely explained by an analysis of home versus work usage. Not surprisingly, work users dominate the Internet during the Daytime daypart, with almost 70% of the users each minute at Work. During the Early Morning daypart, Work usage represents just over half of all usage, but only one-third during the other three dayparts, as shown in Chart E.

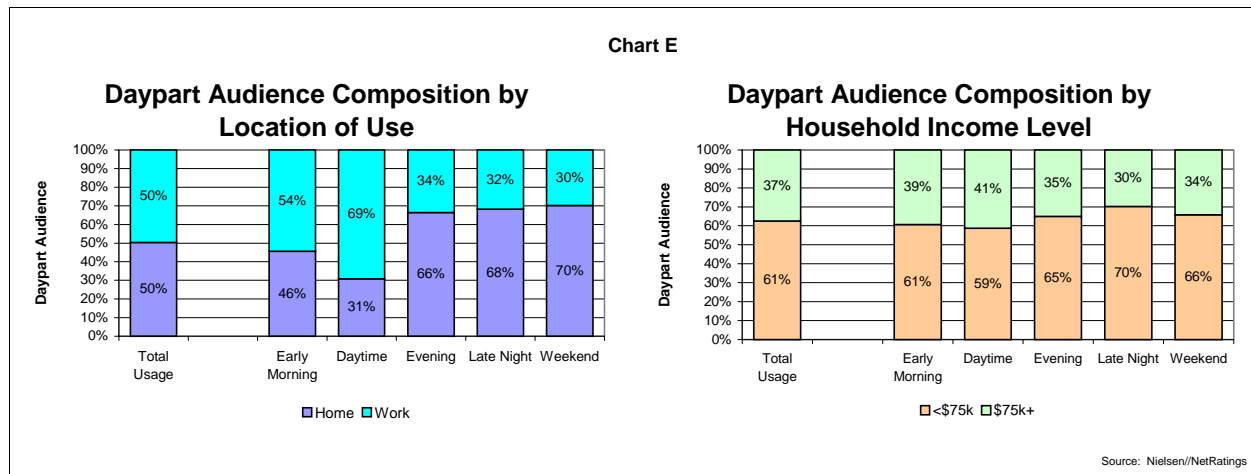
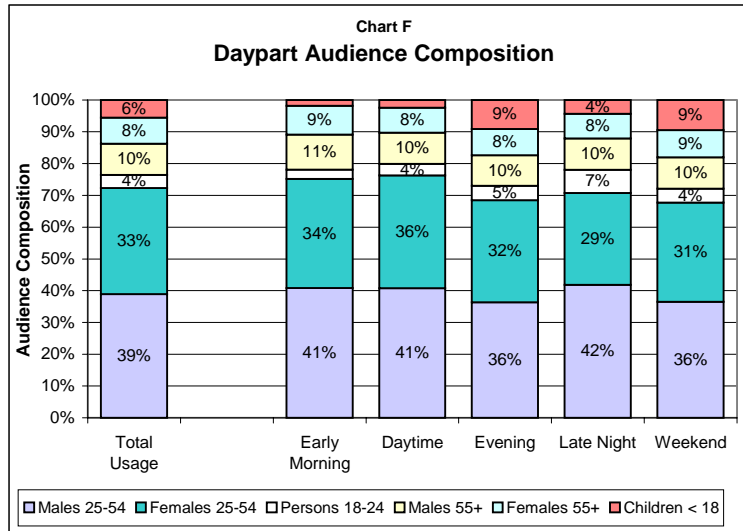


Chart E also shows how the audience composition based on household income varies from one daypart to the next. Users from a higher income level (\$75,000 plus) represent 41% of all usage during the Daytime, reflecting a high percentage of working people, and only 34% on Weekends, when usage from home predominates.

Audience composition by gender/age shows some differences by dayparts, as shown in Chart F. Overall, Males 25-54 are the primary users, accounting for 39% of the average minute audience, or 39% of the usage minutes. Females 25-54 are close behind with 33%, and Persons 55+ are responsible for 18%. Children under the age of 18 and Persons 18-24 round out the total with 6% and 3%, respectively.



Some dayparts show better odds at reaching a specific target audience. For example, Males 25-54 make up 41% of the users during Early Morning, Daytime and Late Night, while only 36% during the Evening and Weekend, a significant change. Therefore, all else being equal, it is somewhat easier to reach a Male aged 25-54 during Early Morning, Daytime and Late Night.

Conversely, users under the age of 18 make up 3% of the audience during

Early Morning, Daytime and Late Night, and then triple to 9% of the average minute audience during the Evening and on Weekends. Therefore, reaching a child/teen on the Internet during Evenings and Weekends is three times more likely than during the other dayparts.

Daypart Summary

The table below summarizes the characteristics of five Internet dayparts:

| Daypart | Days/Time | Average Minute Audience (000) | Average Daily Cumulative Audience (000) | Location of Usage: Work / Home | Hh income composition: <\$75K / \$75K+ | Gender/Age group that over-indexes compared to Total |
|---------------|-----------------|-------------------------------|---|--------------------------------|--|--|
| Early Morning | M-F 6am – 8am | 1,373 | 5,524 | 54% / 46% | 61% / 39% | Men 25-54, P 55+ |
| Daytime | M-F 8am - 5pm | 3,841 | 23,384 | 69% / 31% | 59% / 41% | Persons 25-54 |
| Evening | M-F 5pm -11pm | 2,792 | 17,994 | 34% / 66% | 65% / 35% | Persons <25 |
| Late Night | M-F 11pm – 6am | 676 | 5,896 | 32% / 68% | 70% / 30% | Persons 18-24 |
| Weekend | Sat-Sun all day | 1,599 | 16,774 | 30% / 70% | 66% / 34% | Persons <18 |

Internet Users Seek Out Different Types of Sites Depending on the Daypart

What type of sites are visitors seeking out during each daypart? To answer this question, site visitation patterns were examined for 15 different site categories. (See Appendices C and D for more details.) These 15 categories comprise about 75% of total Internet usage³.

The top 4 categories accounted for almost half of all time spent online.⁴ These categories are:

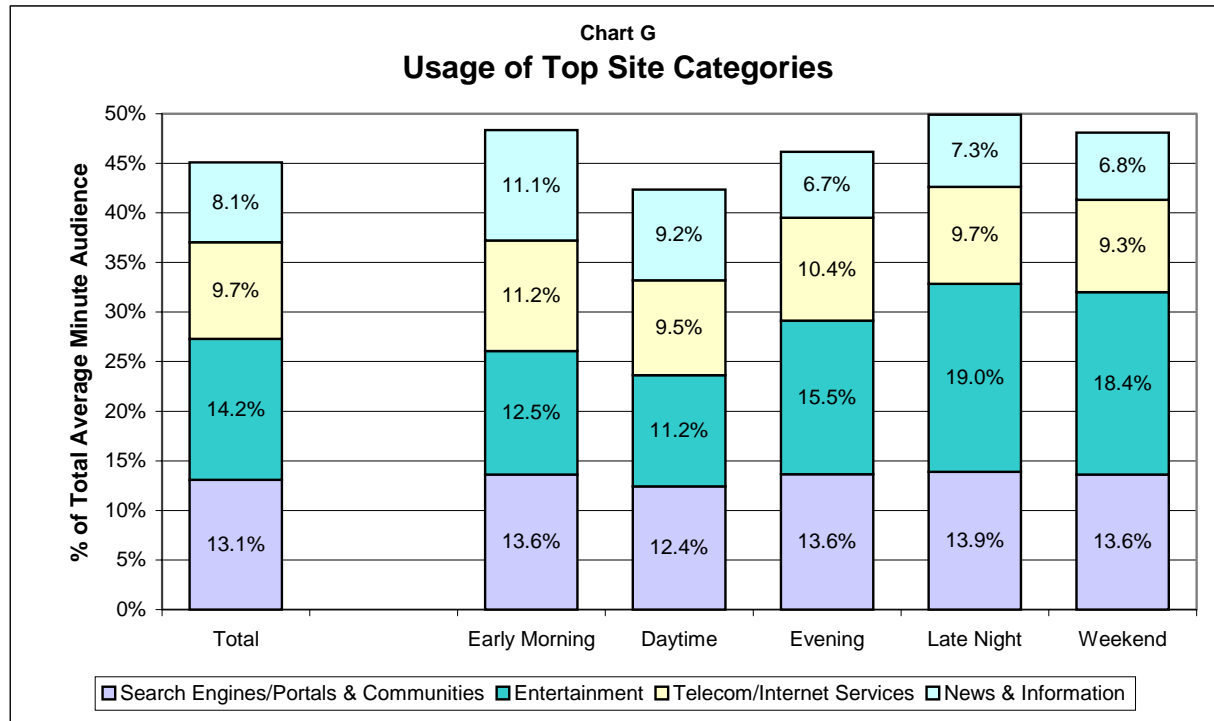
1. **Entertainment sites**⁵ (14.2% of usage). Examples of entertainment sites include ESPN.com, eUniverse, EA Online and Fox Entertainment group.
2. **Search Engines/Portals & Communities** (13.1% of usage). Examples of this category include MSN, Google, Lycos and AskJeeves.
3. **Telecom/Internet sites** (9.7% of usage). This category includes all e-mail, instant messaging, calendars, address books and chat.
4. **News & Information sites** (8.1% of usage). Examples of this category are MSNBC.com, the About Network, Weather.com and USATODAY.com.

Of the 4 top categories listed above, only two (Entertainment and News & Information), can be classified as Content; the others can broadly be considered Utilities in that they provide tools to facilitate either communication or search.

³ The remaining 25% of usage is to pornography sites, non-US sites, and sites that do not receive enough usage to get classified by Nielsen//NetRatings.

⁴ See Appendix C for a complete list of the 15 categories and their usage characteristics by daypart.

⁵ While Sports sites were included in the Entertainment category for the purposes of this analysis further examination of Sports as a separate category is necessary and underway to fully understand the specifics of Sports site usage and demographics by time of day.



Source: Nielsen//NetRatings

Interestingly, the Internet Utilities showed only modest variation by daypart compared to the Content sites. Search Engines/Portals & Communities had the least variation in usage by daypart with about 13.6% of time spent online devoted to these types of sites. The exception was the Daytime daypart where only 12.4% of time was spent with Search Engines. Similarly, Telecom/Internet sites showed usage of about 10% across all dayparts with the exception of Early Morning, during which they comprised a slightly higher percentage. Therefore, those online activities that can broadly be classed as Utilities showed little variation in usage minutes by daypart.

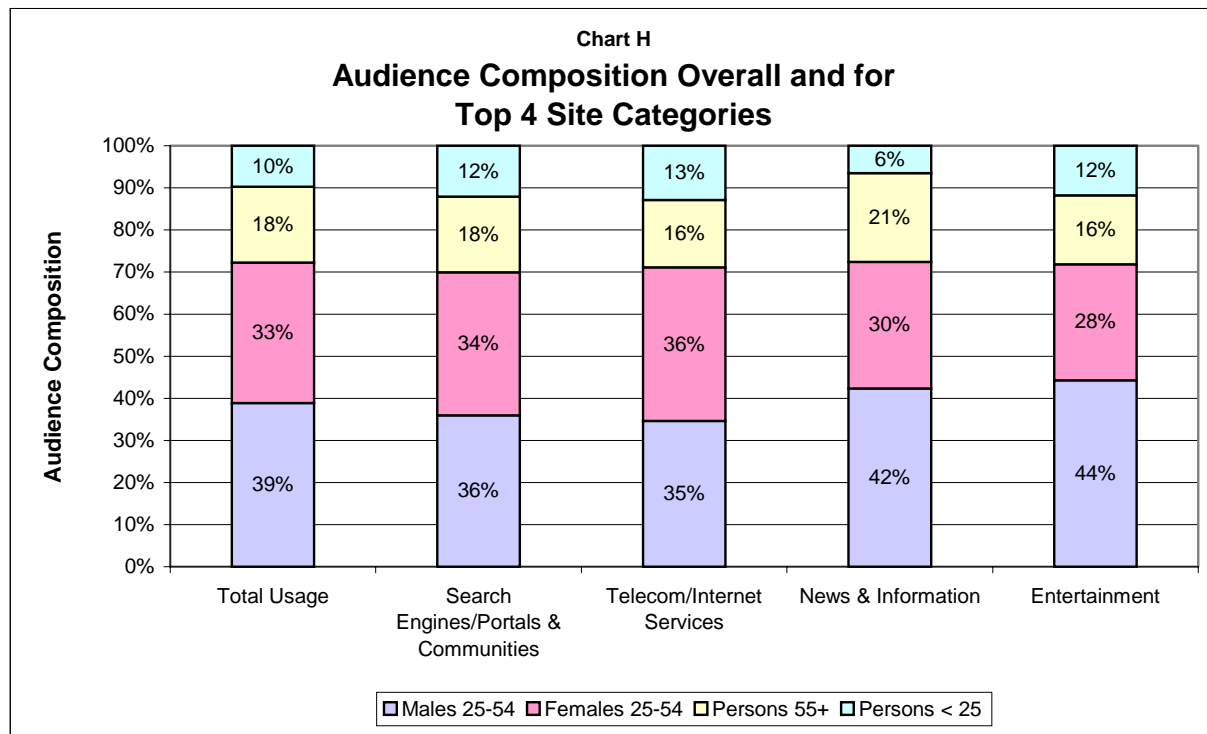
In contrast, the top two Content categories – Entertainment and News & Information – showed marked variations by daypart. Usage at Entertainment sites was significantly less during dayparts dominated by Work usage, compared to those dominated by Home usage. During Early Morning and Daytime, usage at Entertainment sites represented only 11% of the total, versus 15-19% during Home-dominated dayparts.

Usage of sites in the News & Information category showed the opposite pattern: the percent of usage in this category peaked during the Early Morning and Daytime, when a majority of usage was from work.

Audience Composition by Site Category

This analysis was taken a step further to examine the demographic composition by site category across dayparts. This information can be useful when targeting specific audiences. How much of the usage, or what percent of the ads, will the target audience view? Will advertising within a category of sites during certain dayparts yield a better chance at reaching the target audience than others?

Chart H compares the gender/age distribution for the Internet to that of the top four categories, regardless of daypart. Note that the News & Information category attracts a higher percentage of usage from older people and a smaller percentage of usage from younger people compared to the other categories. Audience composition by gender/age, location of use, and household income is shown for all 15 categories in Appendix D.



Source: Nielsen/NetRatings

Based on this demographic breakdown, we can conclude that it is slightly easier to reach Males aged 25-54 on Internet Content sites (Entertainment and News & Information) than on Internet Utilities such as search, email or chat.

Strikingly, Internet Utilities show little variation in audience composition by daypart, whereas Content sites have marked changes in audience demographics by time of day. (Audience Composition by Daypart for all 15 categories is shown in Appendix D.)

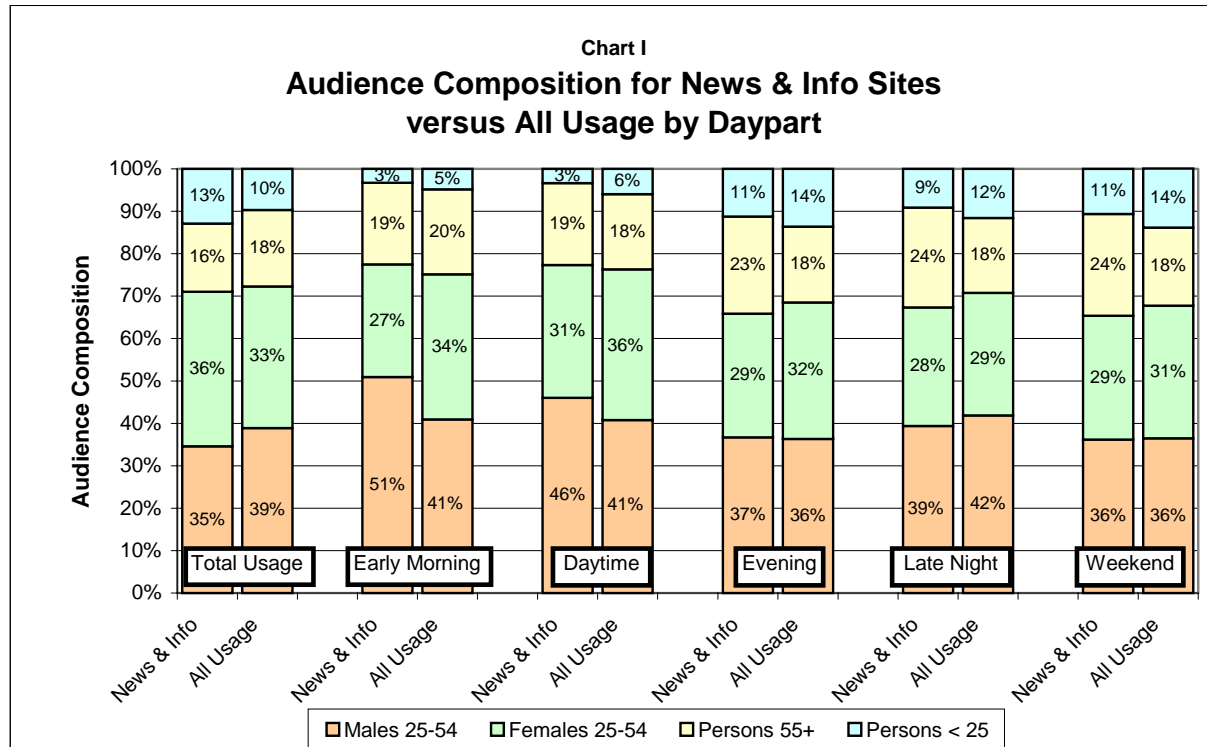
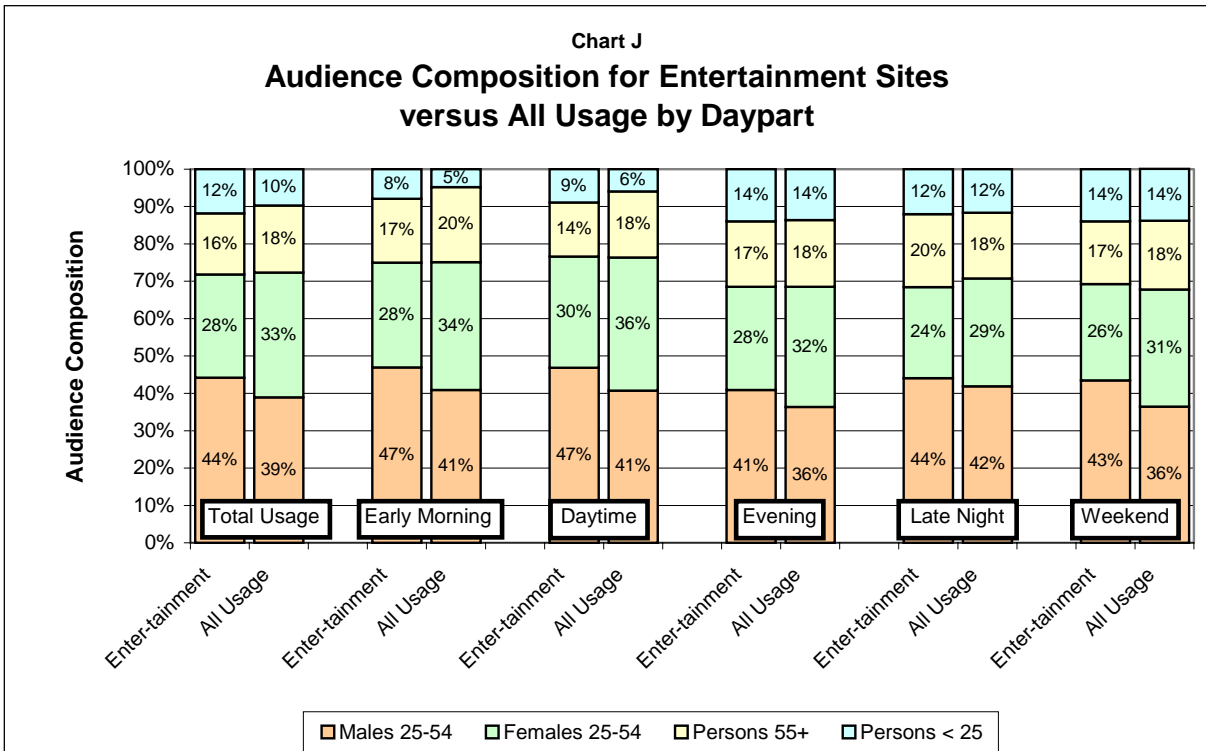


Chart I shows the monthly gender/age composition for the News & Information category compared to the Internet as a whole, including the composition by daypart.

Across the month, Males 25-54 make up 42% of the usage of News & Information sites, which is 3% higher than their percentage of overall Internet usage. Therefore, it is slightly easier to reach a Male 25-54 on News & Information sites than on the Internet, in general.

In the Early Morning daypart, 51% of usage of News & Information sites is from Males 25-54, even though they only make up 41% of total usage for the daypart. Therefore, advertising on News & Information sites during the Early Morning daypart gives an advertiser a 24% better chance at reaching a Male 25-54 than advertising on the Internet in general. However, waiting until late in the day or on the weekends, the chance of reaching Males 25-54 on News & Information sites is about the same as reaching them across the Internet.

If the advertising goal is to reach Persons 55+, Evening and Weekends are a better choice, where Persons 55+ make up about 24% of News & Information usage versus only 18% of total usage.



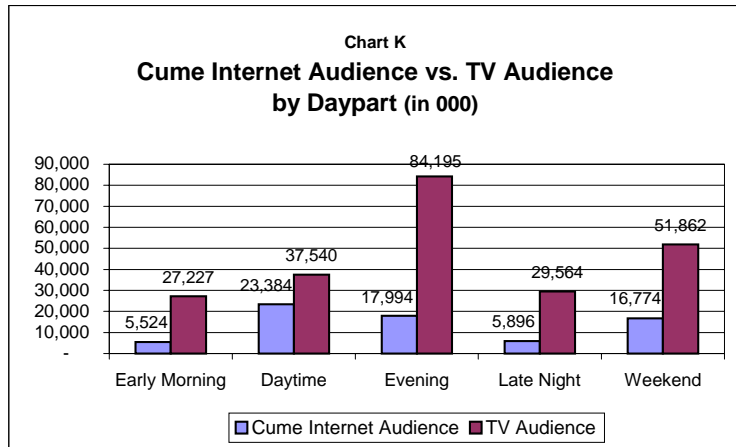
Males 25-54 are also easier to reach on Entertainment sites than they are on the Internet in general. Chart J shows the demographic composition by daypart for the Entertainment category compared to the Internet in general. All dayparts show a higher composition of Male 25-54 usage at Entertainment sites than the Internet and therefore, a higher chance of reaching males. Conversely, Females 25-54 are slightly more difficult to reach across sites in the Entertainment category than on the Internet in general.

Comparison of PUT to Cumulative Reach by Daypart on the Internet

Persons Using Television estimates were analyzed (also average minute audience estimates), using the same daypart definitions used throughout this paper.⁶ As postulated earlier in this paper, the proper comparison between TV reach and Internet reach is not minute-by-minute audience levels, because the two media present advertisements differently. In

television, the opportunity to see an advertisement is limited to the time

during which the advertisement runs, whereas Internet ads persist throughout the daypart and can be seen by anyone accessing the site on which the ads appear anytime during the daypart. As such, the comparison of average minute on television to cumulative daypart audience is instructive. Chart K shows this comparison. By this measure, the cumulative reach of the Internet dayparts generally range from 62% to 20% of the average minute audience for television. It is important to recognize, however, that as of this writing the Internet reaches only about 60% of the total U.S. population.



Source: Nielsen/NetRatings

Conclusion

The three conditions that indicate that Internet dayparts exist have been satisfied:

- Site usage levels vary by time of day;
- Audience composition differs by time of day;
- Content usage, as a percent of total usage, differs across dayparts for some content types.

Media buyers can now apply this understanding of Internet usage patterns and use targeting by daypart to plan more efficient media buys.

⁶ Source: Nielsen TV National People Meter, from 08/26/2002-09/29/2002. Since Nielsen does not provide local time zone estimates for national viewing figures, the dual feed estimates were used, which adjusts Pacific Time Zone to Eastern Time Zone. Therefore, the time analyzed is local for two of the four time zones.

Appendix A - Methodology

The data used this study, provided by Nielsen//NetRatings, represents U.S. Internet usage in September 2002. Hourly usage data for all 30 days in September was segmented by gender/age groups, household income levels, and usage location (home versus work). Data was provided for overall Internet usage as well as for specific site categories. (Nielsen//NetRatings classified sites into one of 15 categories. See Appendix B for more details.)

The primary metric used for this analysis is Average Minute Audience. This estimate, proposed by Steve Coffey and Horst Stipp in late 2001, indicates the number of people using the Internet at a certain point in time and is calculated by taking the total number of minutes used by all users during an hour and dividing by 60 minutes.

For example: If 1,000,000 users used the Web between 1pm and 2pm and spent an average of 15 minutes online, the average minute audience during that hour would be 250,000 users per minute $[(1,000,000 \text{ users} * 15 \text{ minutes}) / 60 \text{ minutes per hour}]$.

Furthering the example, if during a one-hour period, 500,000 men used the Internet for 30 minutes each and 500,000 women used the Internet for 15 minutes each, the average minute audience would be 375,000 users/min. $[(500,000 \text{ men} * 30 \text{ mins.}) / 60 \text{ mins. per hour} + (500,000 \text{ women} * 15 \text{ mins.}) / 60 \text{ mins. per hour} = 250,000 + 125,000]$. This means that approximately 67% of the usage during this hour is by men, 33% by women.

For the purposes of this analysis, local time, as opposed to standardized time, was used. Using local time allows for generalizations about usage levels vis-à-vis daily routines, such as limited usage from midnight to 6am when most people are asleep.

Appendix B - Category Definitions

Search Engines/Portals & Communities – Examples include MSN, Google, Lycos and AskJeeves.

Entertainment – Examples include ESPN.com, eUniverse, EA Online and Fox Entertainment group.

Telecom/Internet Services – Includes all e-mail, instant messaging, calendars, address books and chat.

News & Information – Examples include MSNBC.com, the About Network, weather.com and USATODAY.com.

Finance/Insurance/Investment – Examples include Yahoo! Finance, Paypal, Bank of America, American Express, Citibank, Marketwatch.com, Capital One and Wells Fargo.

Multi-category Commerce – Examples include Amazon, eBay, MSN Shopping, Wal-Mart Stores, DealTime, BizRate Shopping, Sears and epinions.com.

Computers & Consumer Electronics – Examples include Microsoft, Real, CNET, Adobe, KaZaA, BestBuy.com, Dell Computer and McAfee.

Education & Career – Examples include Monster.com, CareerBuilder, U.S. Dept. of Education, Merriam-Webster, and harvard.edu.

Travel – Examples include MapQuest, Expedia, Orbitz.com, Hotels.com, American Airlines and PriceLine.

Family & Lifestyles – Examples include Disney Online, ToysRUs, Match.com, WebMD, Ancestry.com, Cartoon Network, Drugstore.com and iVillage Astrology.com.

Home & Fashion – Examples include JC Penney, MSN House & Home, Kraft Foods, Food Network, Realtor.com, The Gap, Macys and The Home Depot.

Government & Non-Profit – Examples include U.S. Dept. of Health & Human Services, U.S. Dept. of Commerce, U.S. Dept. of Justice, U.S. Dept. of Transportation and the State of Ohio.

Corporate Information – Examples include Oingo, vicinity.com, Idialognetwork.com, Springstreetnetworks.com, Cox Communications, Panasonic, VNU Business Media, webpower.com and eprize.net.

Special Occasions – Examples include Ups.com, U.S. Postal Service, Americangreetings.com, Blue Mountain, Egreetings.com and noradsanta.org.

Auto – Examples include eBay Motors, MSN Autos, Kelley Blue Book, AutoTrader.com, Edmunds.com, Autoweb.Com, Ford Motor Company, Yahoo! Autos, Cars.com and Autobytel.

Appendix C - Total Internet Usage Composition of Site Categories by Daypart

| Site Category | Total | Early Morning M-F 6a-8a | Daytime M-F 8a-5p | Evening M-F 5p-11p | Late Night M-F 11p-6a | Weekend Sat-Sun |
|--------------------------------------|--------------|----------------------------|----------------------|-----------------------|--------------------------|--------------------|
| Search Engines/Portals & Communities | 13.1% | 13.6% | 12.4% | 13.6% | 13.9% | 13.6% |
| Entertainment | 14.2% | 12.5% | 11.2% | 15.5% | 19.0% | 18.4% |
| Telecom/Internet Services | 9.7% | 11.2% | 9.5% | 10.4% | 9.7% | 9.3% |
| News & Information | 8.1% | 11.1% | 9.2% | 6.7% | 7.3% | 6.8% |
| Finance/Insurance/Investment | 5.3% | 7.1% | 6.6% | 4.4% | 4.2% | 3.5% |
| Multi-category Commerce | 5.3% | 4.6% | 4.3% | 6.0% | 6.2% | 6.5% |
| Computers & Consumer Electronics | 4.4% | 4.9% | 4.3% | 4.6% | 4.3% | 4.4% |
| Education & Careers | 2.7% | 2.1% | 3.4% | 2.5% | 1.9% | 2.0% |
| Travel | 2.2% | 1.5% | 2.3% | 2.4% | 1.9% | 2.3% |
| Family & Lifestyles | 2.8% | 1.9% | 2.2% | 3.3% | 2.8% | 3.8% |
| Home & Fashion | 1.7% | 1.2% | 1.5% | 1.8% | 1.4% | 2.0% |
| Government & Non-Profit | 1.2% | 1.3% | 1.5% | 1.0% | 0.8% | 0.8% |
| Corporate Information | 0.9% | 1.0% | 1.1% | 0.9% | 0.7% | 0.7% |
| Special Occasions | 0.7% | 0.7% | 0.8% | 0.6% | 0.5% | 0.4% |
| Automotive | 0.9% | 0.7% | 0.7% | 1.1% | 0.9% | 1.1% |
| Sum of Site Categories | 73.2% | 75.3% | 71.0% | 74.6% | 75.4% | 75.5% |

Appendix D - Demographic Composition by Site Category

| Site Category | Location of Use | | Household Income [^] | | Gender / Age | | | |
|--------------------------------------|-----------------|------|-------------------------------|------------|--------------|---------------|-------------|--------------|
| | Home | Work | Under \$75K | \$75K Plus | Males 25-54 | Females 25-54 | Persons 55+ | Persons < 25 |
| <i>Total Usage</i> | 50% | 50% | 61% | 37% | 39% | 33% | 18% | 10% |
| Search Engines/Portals & Communities | 54% | 46% | 62% | 36% | 36% | 34% | 18% | 12% |
| Telecom/Internet Services | 54% | 46% | 66% | 32% | 35% | 36% | 16% | 13% |
| News & Information | 42% | 58% | 59% | 38% | 42% | 30% | 21% | 6% |
| Entertainment | 60% | 40% | 65% | 33% | 44% | 28% | 16% | 12% |
| Finance/Insurance/Investment | 41% | 59% | 49% | 49% | 41% | 31% | 24% | 4% |
| Multi-category Commerce | 55% | 45% | 64% | 34% | 40% | 36% | 18% | 7% |
| Computers & Consumer Electronics | 50% | 50% | 62% | 36% | 39% | 31% | 19% | 11% |
| Education & Careers | 39% | 61% | 62% | 35% | 33% | 42% | 11% | 14% |
| Travel | 46% | 54% | 48% | 49% | 35% | 38% | 23% | 4% |
| Family & Lifestyles | 61% | 39% | 65% | 32% | 25% | 36% | 23% | 16% |
| Home & Fashion | 54% | 46% | 61% | 36% | 21% | 52% | 20% | 6% |
| Government & Non-Profit | 39% | 61% | 55% | 42% | 40% | 33% | 22% | 4% |
| Corporate Information | 45% | 55% | 58% | 38% | 35% | 38% | 21% | 7% |
| Special Occasions | 44% | 56% | 57% | 40% | 28% | 46% | 20% | 6% |
| Automotive | 59% | 41% | 62% | 36% | 50% | 20% | 19% | 11% |

[^] A very small number of panelists did not have an income level assigned. Therefore, the sum of Household income level may be less than 100%.

About the Author

Lisa Sharkis Lowy has spent years analyzing media research data. She was initiated into the industry at The Arbitron Company, focusing on television and ScanAmerica data. More recently, she was Media Metrix's Director of Product Research, ensuring all products adhered to the methodology and met high quality standards. While at Media Metrix, she helped build an optimization model of Internet ad buys across sites. Lisa delivered her paper about maximizing Internet advertising efficiency at the ARF/ESOMAR conference in Brazil in 2000. Lisa received her M.B.A. from George Washington University in 1994 and a B.S. from Ohio University's Honors Tutorial College.

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About the Online Publishers Association

Founded in June 2001 by some of the Internet's leading content brands, the Online Publishers Association (OPA) is an industry trade organization dedicated to representing high-quality online publishers before the advertising community, the press, the government and the public.

OPA is committed to producing groundbreaking research into online advertising and media consumption with the goal of advancing the online publishing industry. Through credible research and ongoing communications, OPA seeks to establish and promote the Internet as an effective advertising medium for marketers and a sustainable media business for publishers, thereby ensuring the continued availability of quality content to serve the public good.

Current members of OPA are: Bankrate.com, CBS MarketWatch, CNET Networks, CondéNet, Cox Enterprises, ESPN.com, Forbes.com, Internet Broadcasting Systems, Knight Ridder Digital, Le Monde Interactif, Meredith Corporation, MSNBC.com, New York Times Digital, Primedia/About Inc., Scripps Networks, Slate, SportingNews.com, Tribune Interactive, USATODAY.com, Wall Street Journal Online, Washingtonpost.Newsweek Interactive and weather.com.