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## **Multi-channel Media Brands: Attitudinal and Usage Study**

Conducted in partnership with

**FRANK N. MAGID ASSOCIATES, INC.**

RESEARCH • COUNSEL

[www.online-publishers.org](http://www.online-publishers.org)

# Methodology & Sample

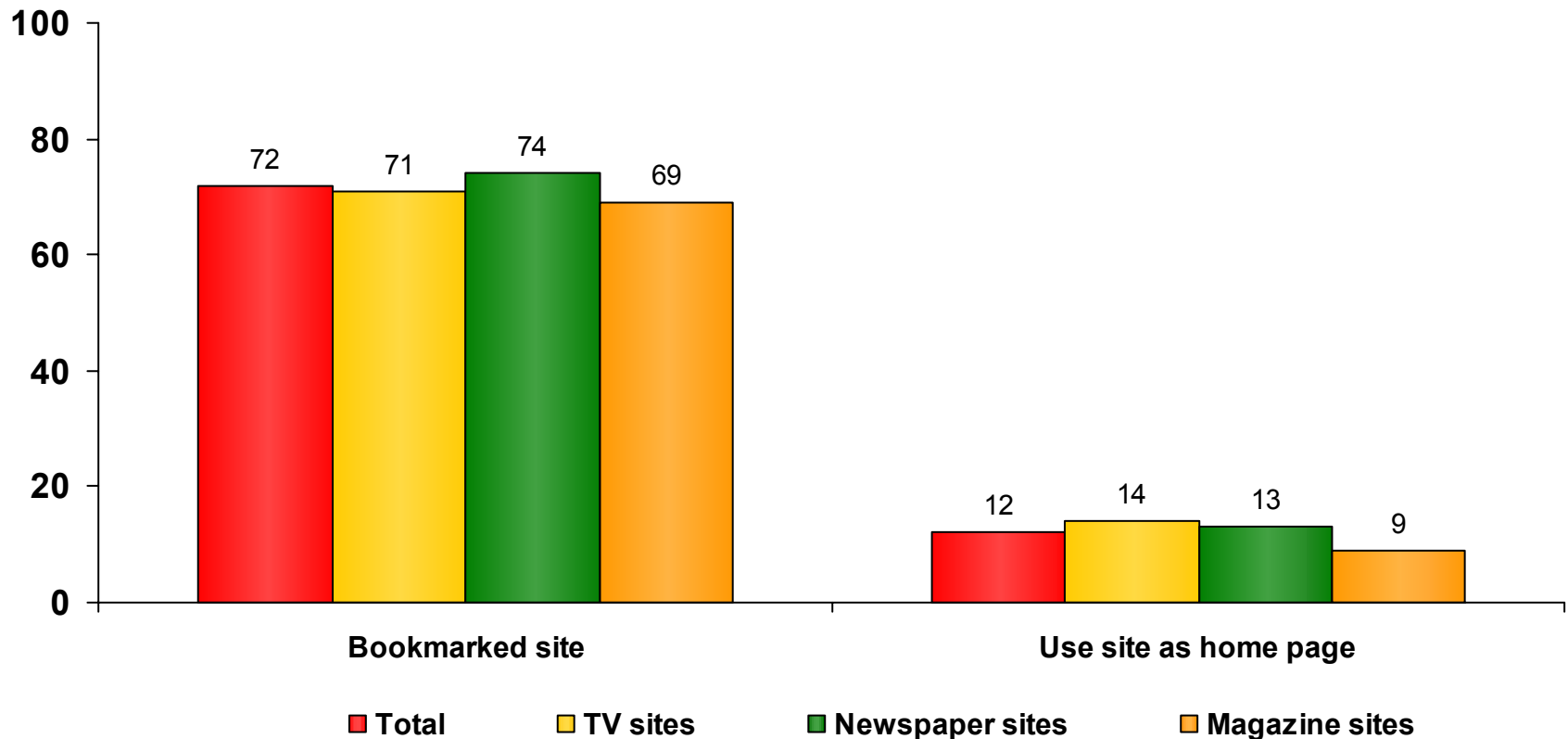
- Online survey of 25,852 users age 18-54 conducted on 41 individual Web sites
- Recruiting method: Pop-up intercepts
  - One week field period per site
  - Survey hosted at Frank N. Magid Associates' online division [surveysonline.com](http://surveysonline.com)
  - Note: Due to intercept recruiting, sample under-represents infrequent site visitors

# Participating Web Sites

- **About.com**
- **Bankrate.com**
- **CBS.MarketWatch.com**
- **Charlotte.com**
- **ChicagoTribune.com**
- **Concierge.com**
- **DallasNews.com**
- **Diy.net.com**
- **Epicurious.com**
- **ESPN.com**
- **FineLiving.com**
- **Foodnetwork.com**
- **Herald.com**
- **HGTV.com**
- **Internet Broadcasting Systems**
- **KansasCity.com**

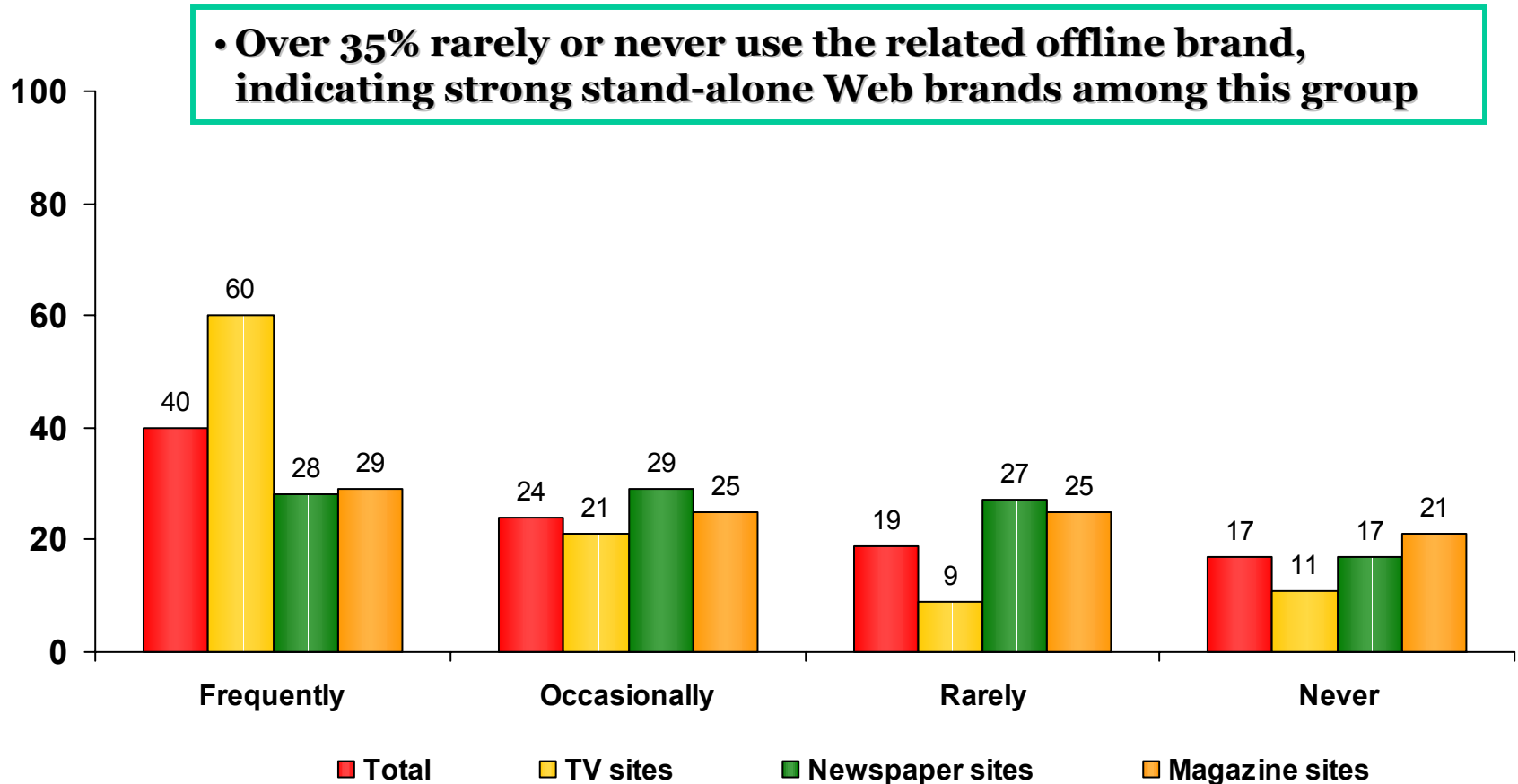
- **LATimes.com**
- **MercuryNews.com**
- **MSNBC.com**
- **Newsweek.com**
- **NYTimes.com**
- **Philly.com**
- **SeattlePI.com**
- **SportingNews.com**
- **Star-Telegram.com**
- **Style.com**
- **Today Web site**
- **TwinCities.com**
- **USAToday.com**
- **Wall Street Journal Online**
- **WashingtonPost.com**
- **Weather.com**

# Brand Name Media Web Sites Are Routine Destinations...



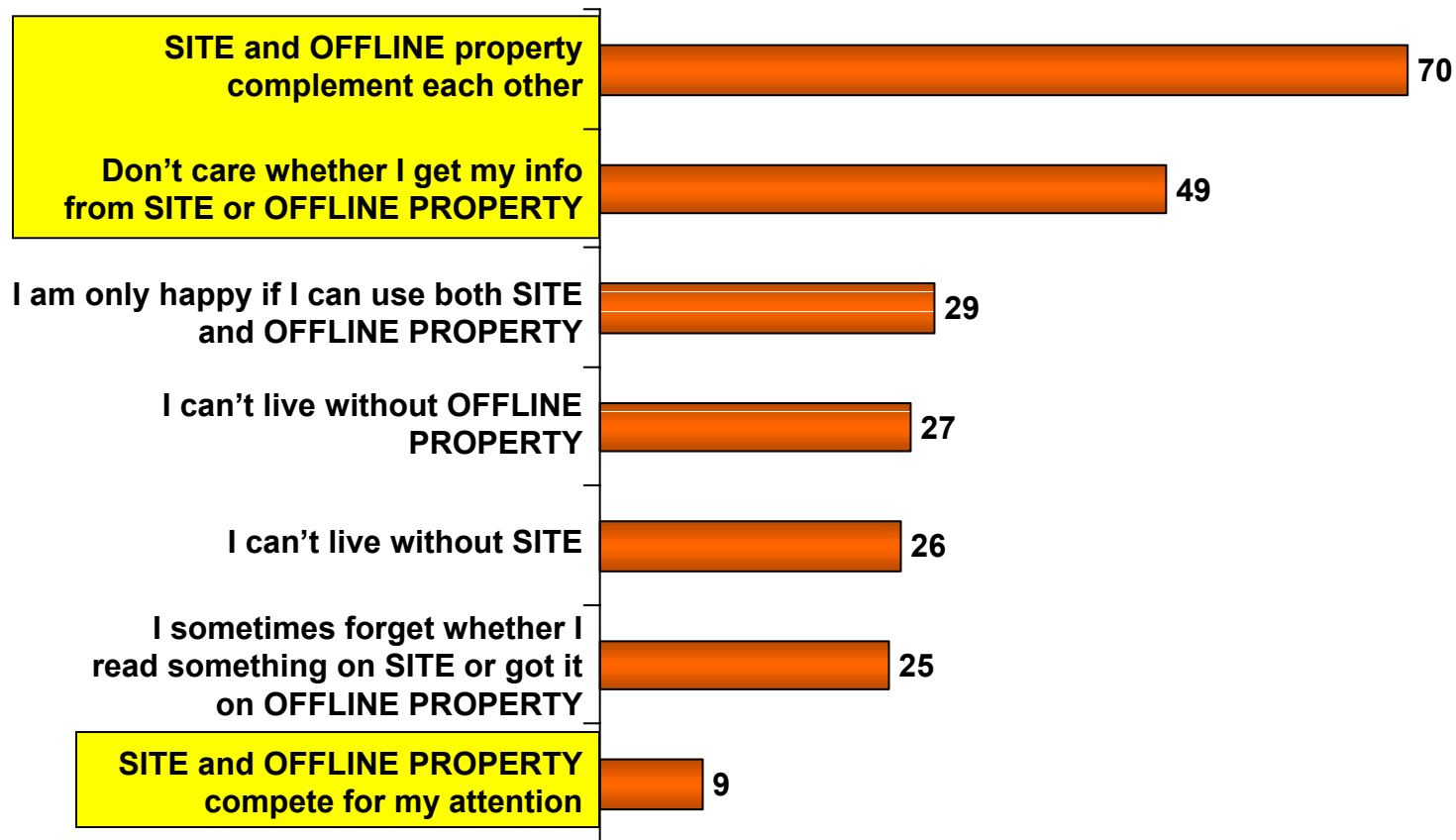
Q. 6(A-B): Do you have SITE bookmarked as one of your favorites? Do you use SITE as your home page?

# ...And There Is Strong Usage Overlap With Offline Properties



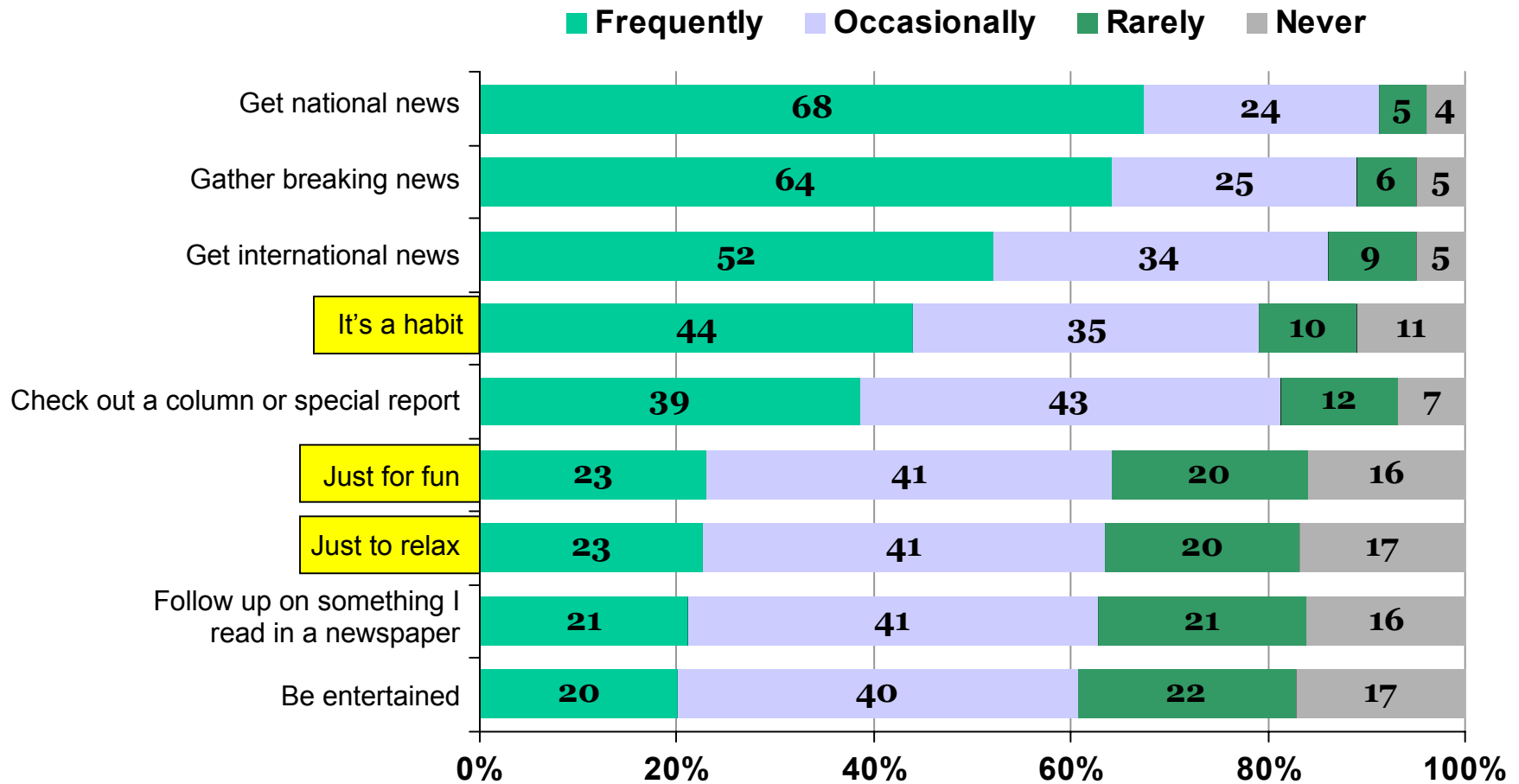
Q. 20: On average, how often do you read/watch/listen to OFFLINE PROPERTY? BASE: Total sample (N=25,852)

# Complementary Brand Usage Is The Norm & Cannibalization Minimal



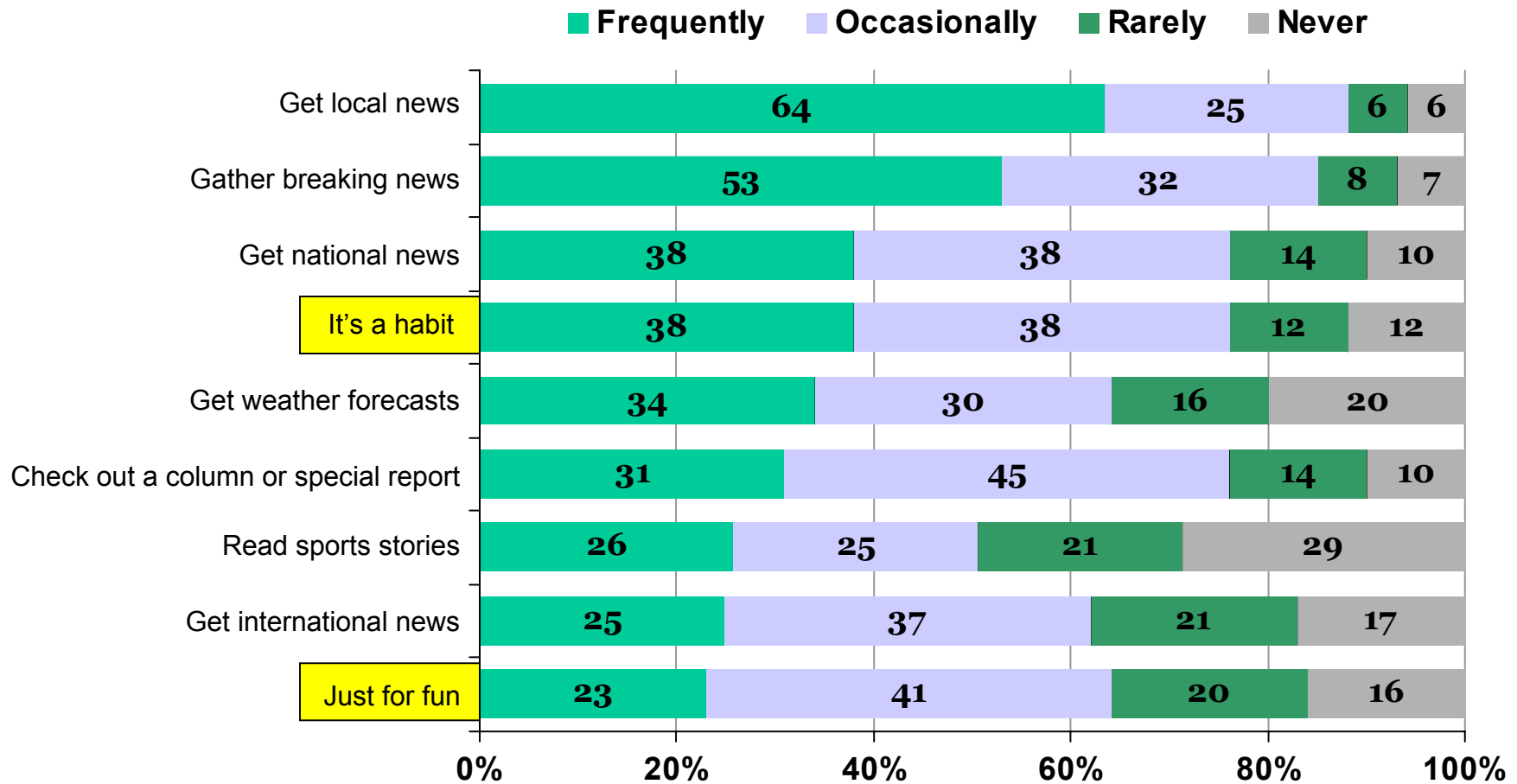
Q. 31(A-G): Please indicate how much you agree or disagree with each of the following statements about SITE and OFFLINE PROPERTY. 5-point scale, ranging from 1 (totally disagree) to 5 (totally agree). Percentages indicate Top 2 Box ratings (4+5). BASE: Those who use offline property frequently/occasionally

# Consumers Visit National News Sites Habitually...And For Fun



Q. 9: How often do you visit SITE to do the following? NOTE: Listed are the top 9 statements. NOTE: Listed are the top 9 statements. BASE: Those sampled on national news sites who were asked the respective questions.

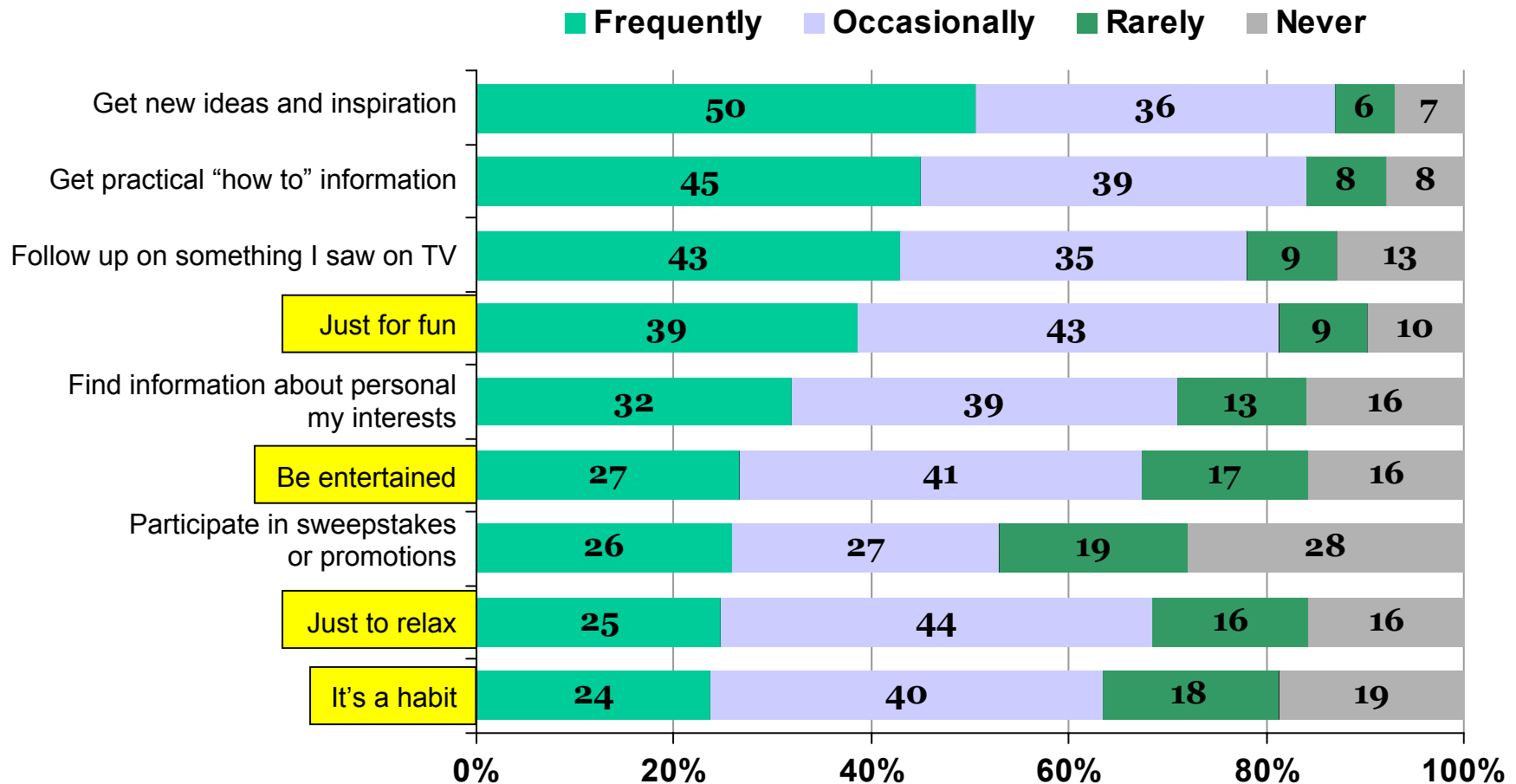
# Consumer Use Local News Sites Similarly



Q. 9: How often do you visit SITE to do the following? NOTE: Listed are the top 9 statements. BASE: Those sampled on local news sites who were asked the respective questions.

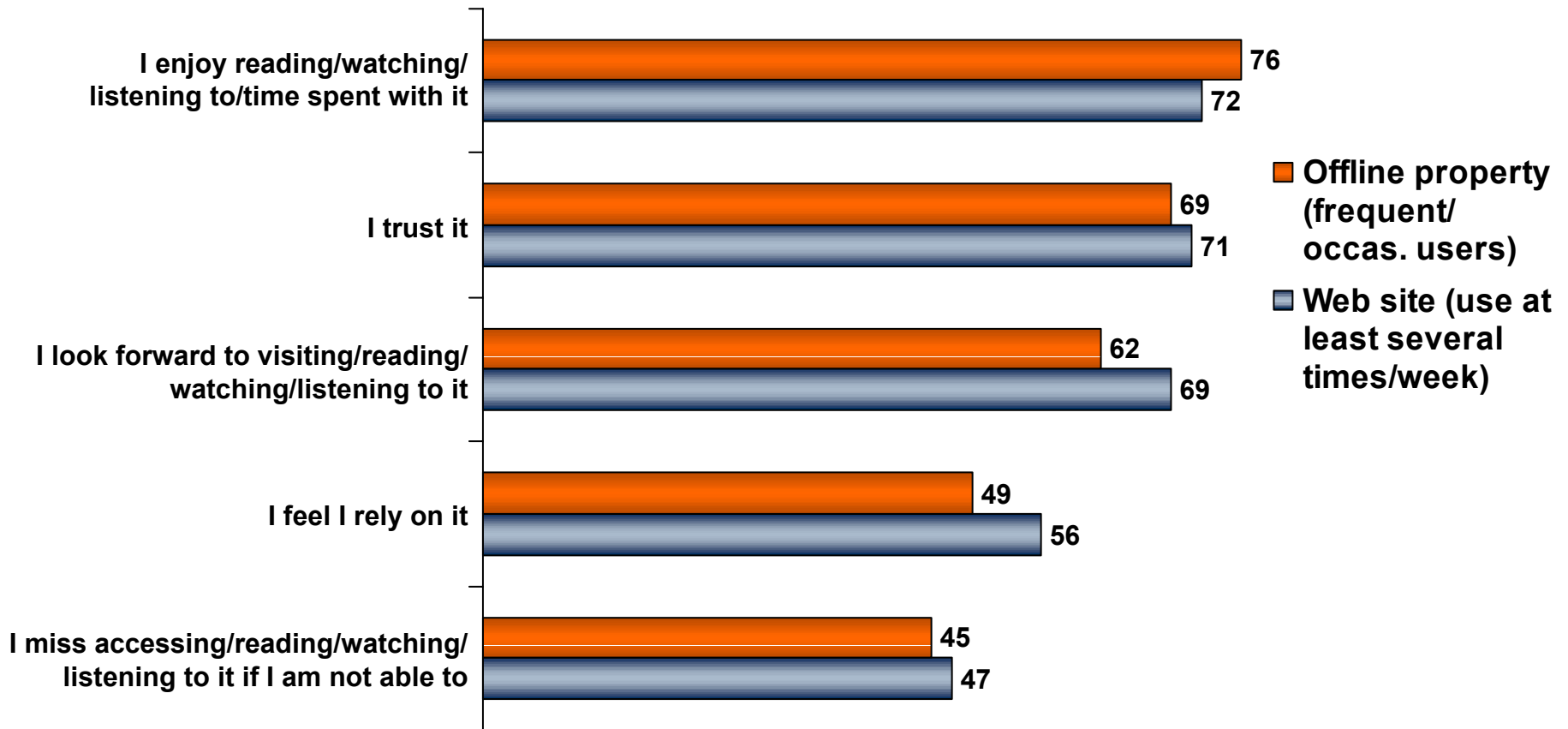


# Lifestyle & Entertainment Sites Are Also Used Out Of Habit, But More So For Fun



Q. 9: How often do you visit SITE to do the following? NOTE: Listed are the top 9 statements. NOTE: Listed are the top 9 statements. BASE: Those sampled on lifestyle/entertainment sites who were asked the respective questions.

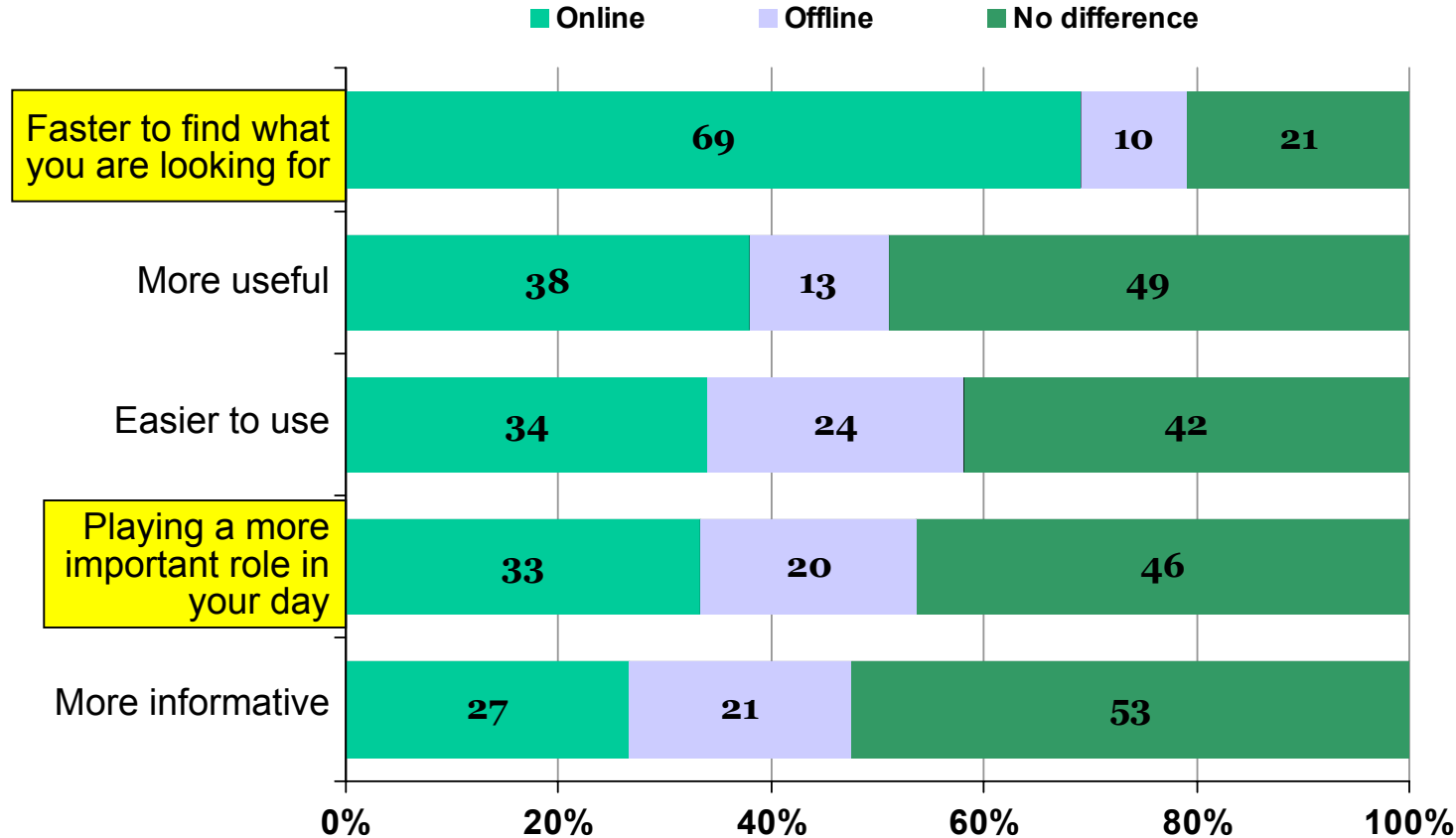
# Consumers Show Strong Emotional Attachment To Both Online & Offline Media Brands



Q. 7 & 22(A-F): Please indicate how much you agree or disagree with each of the following statements. 5-point scale, ranging from 1 (totally disagree) to 5 (totally agree). Percentages indicate Top 2 Box ratings (4+5)

# Online Properties Offer Functional Advantages...

- Speed and ease are advantages of online over offline
- Online brand property plays a more important role for many
- Those with high-speed access are consistently more in favor of online

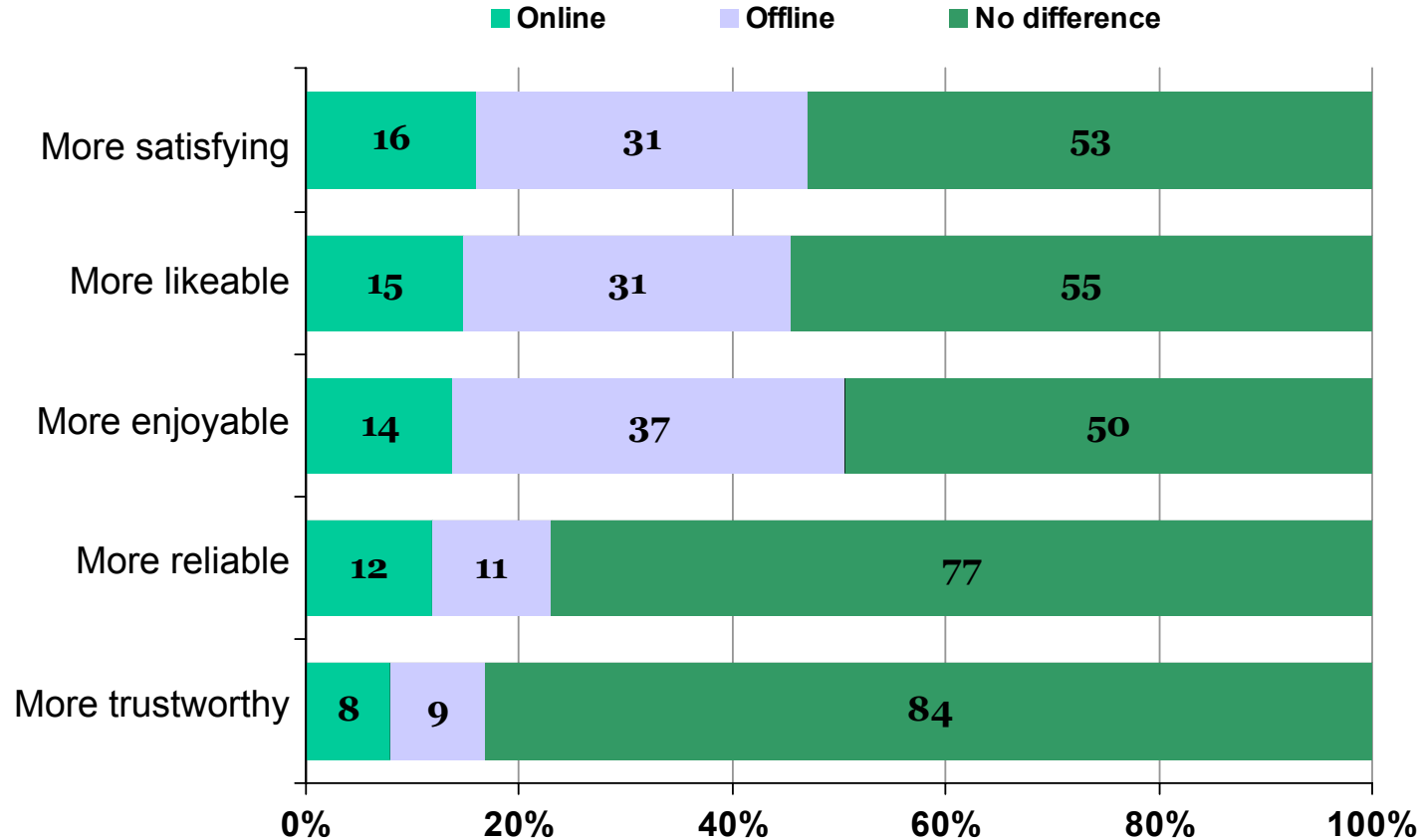


Q. 30(A-J): Compare SITE and OFFLINE PROPERTY. Which of the two is...? BASE: Those who use offline property frequently/occasionally.

# ...But Offline Properties Are More Pleasing

- **Satisfaction and enjoyment are advantages of offline over online**

- **Trust in and reliability of online & offline properties are comparable**

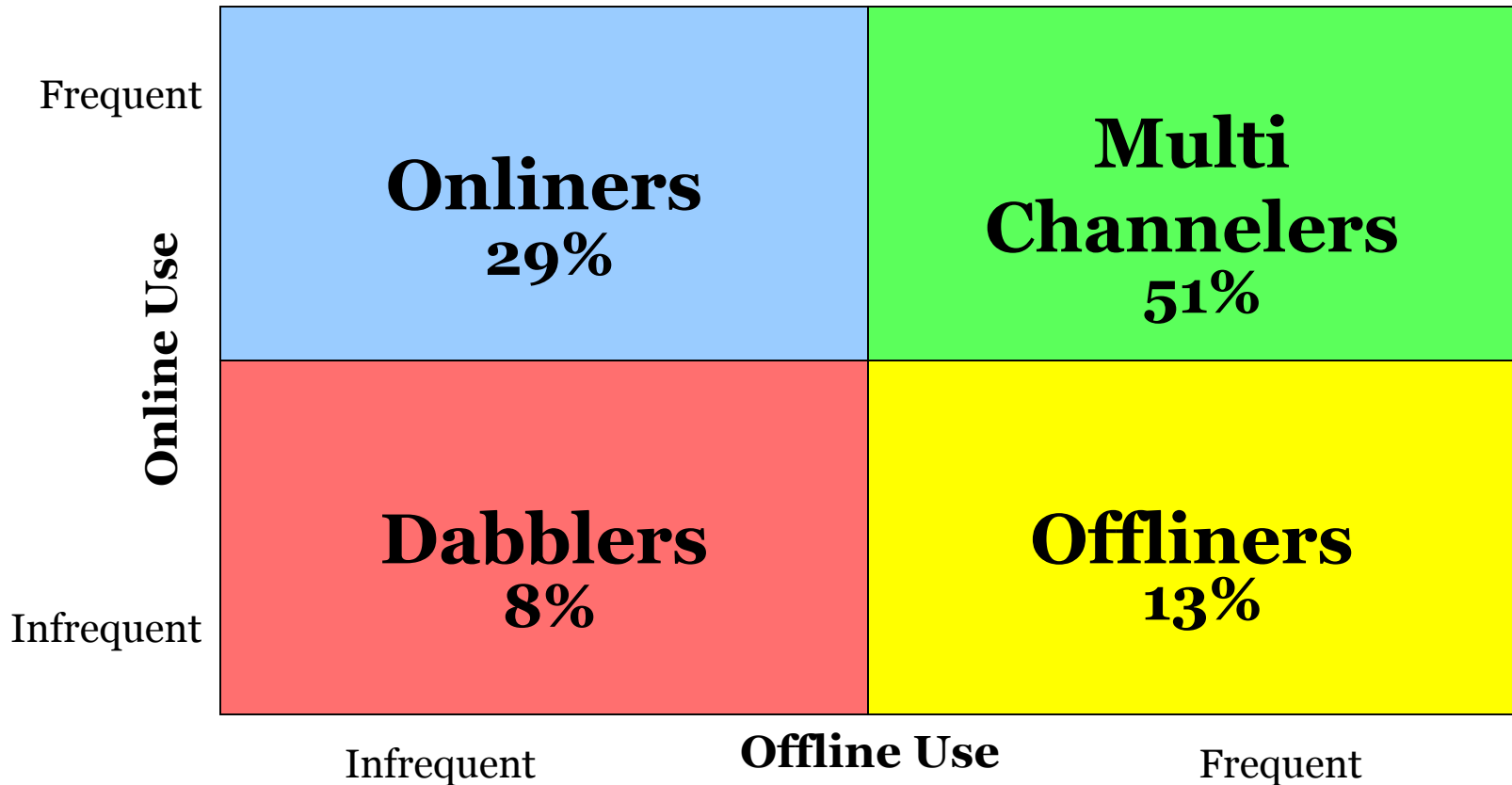


Q. 30(A-J): Compare SITE and OFFLINE PROPERTY. Which of the two is...? BASE: Those who use offline property frequently/occasionally.

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# Multi-Channel Media Brand Usage Segments

# Segments Based On Online/Offline Brand Usage Frequency

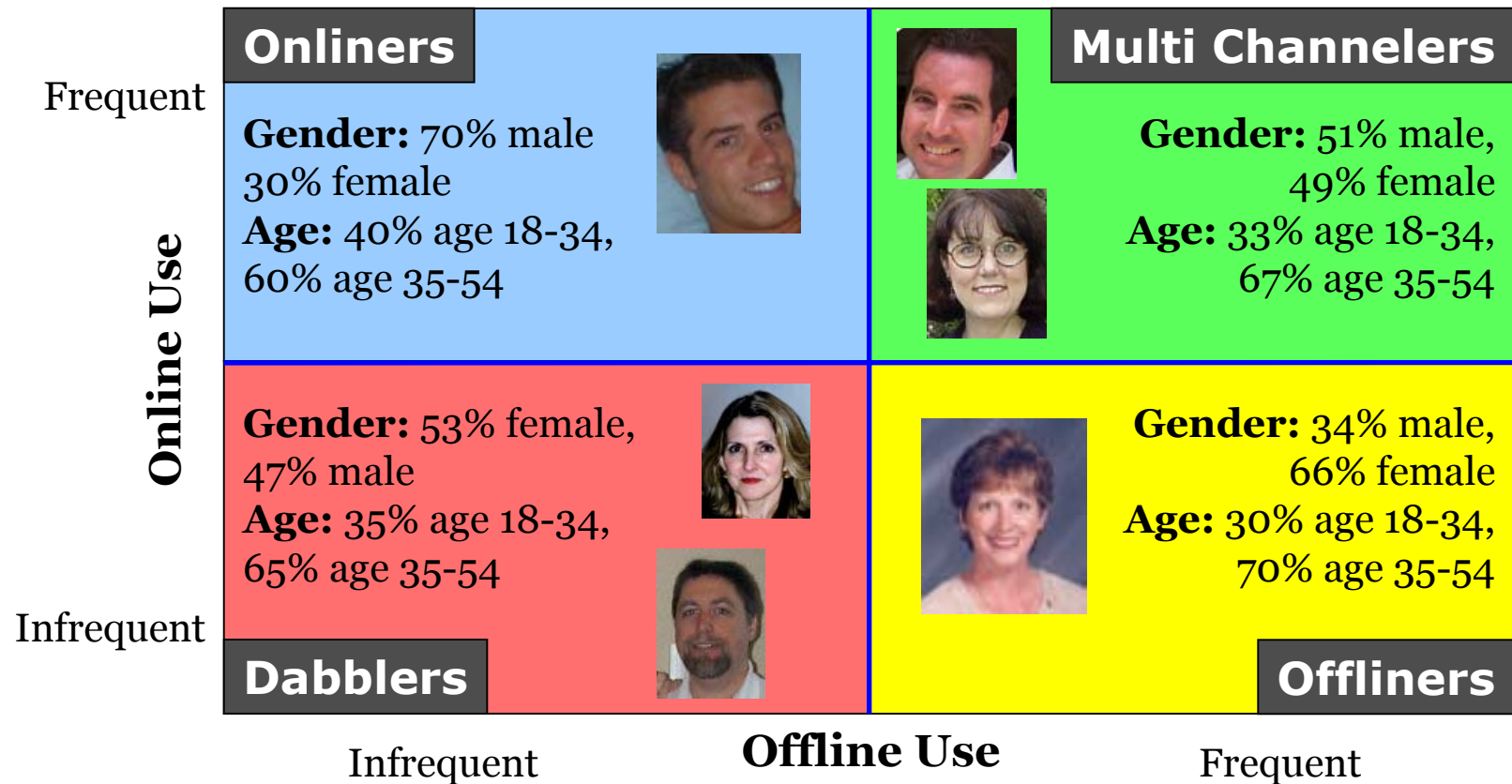


BASE: Total sample (N=25,852)

Definitions: Frequent online use = Several times a week or more (Q. 3). Infrequent online use = several times a month or less (Q. 3).

Frequent offline use = frequently/occasionally (Q. 20). Infrequent offline use = rarely/never (Q. 20).

# Segment Profiles



# Meet The Onliners




## Attitudes

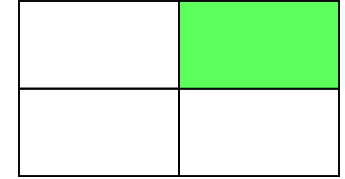
- 70% enjoy time spent with Web site
- 53% feel they rely on Web site
- 67% think Web site is easier to use than offline property
- 51% think Web site is more satisfying than offline property
- When both Web site and offline property are available, 82% would prefer to use the Web site

## Behavior

- 51% visit Web site routinely throughout the day
- 64% have high-speed Internet access at home and average Internet use is 21 hours/week
- Average TV viewing is 14 hours/week



# Meet The Multi Channelers



## Attitudes

- 73% enjoy time spent with Web site
- 57% feel they rely on Web site
- 37% think Web site is easier to use, 21% choose offline property
- 54% are similarly satisfied by Web site and offline property
- When both Web site and offline property are available, 54% would prefer to use the offline property

## Behavior

- 51% visit Web site routinely throughout the day
- 63% have high-speed Internet access at home and average Internet use is 19 hours/week
- Average TV viewing is 18 hours/week

# Meet The Offliners



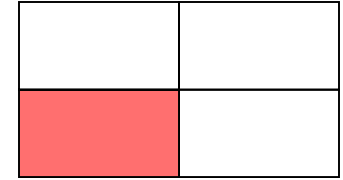

## Attitudes

- 57% enjoy time spent with Web site
- 28% feel they rely on Web site
- 23% think Web site is easier to use, 34% choose offline property
- 8% think Web site is more satisfying, 43% select offline property
- When both Web site and offline property are available, 74% would prefer to use the offline property

## Behavior

- 5% visit Web site routinely throughout the day
- 59% have high-speed Internet access at home and average Internet use is 17 hours/week
- Average TV viewing is 19 hours/week

# Meet The Dabblers



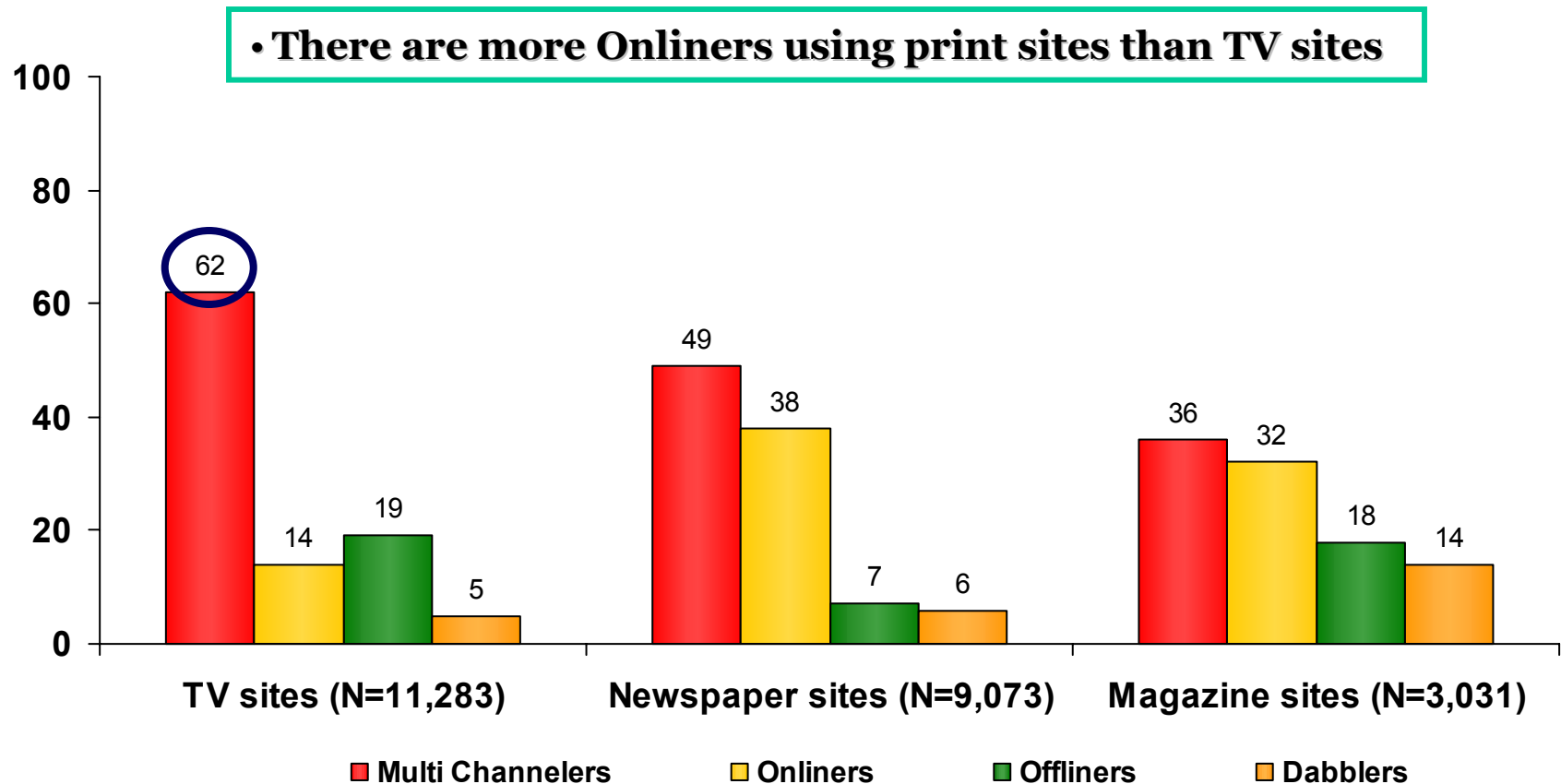
## Attitudes

- 42% enjoy time spent with Web site
- 19% feel they rely on Web site
- 44% think Web site is easier to use, 11% choose offline property
- 26% think Web site is more satisfying, 11% select offline property
- When both Web site and offline property are available, 68% would prefer to use the Web site

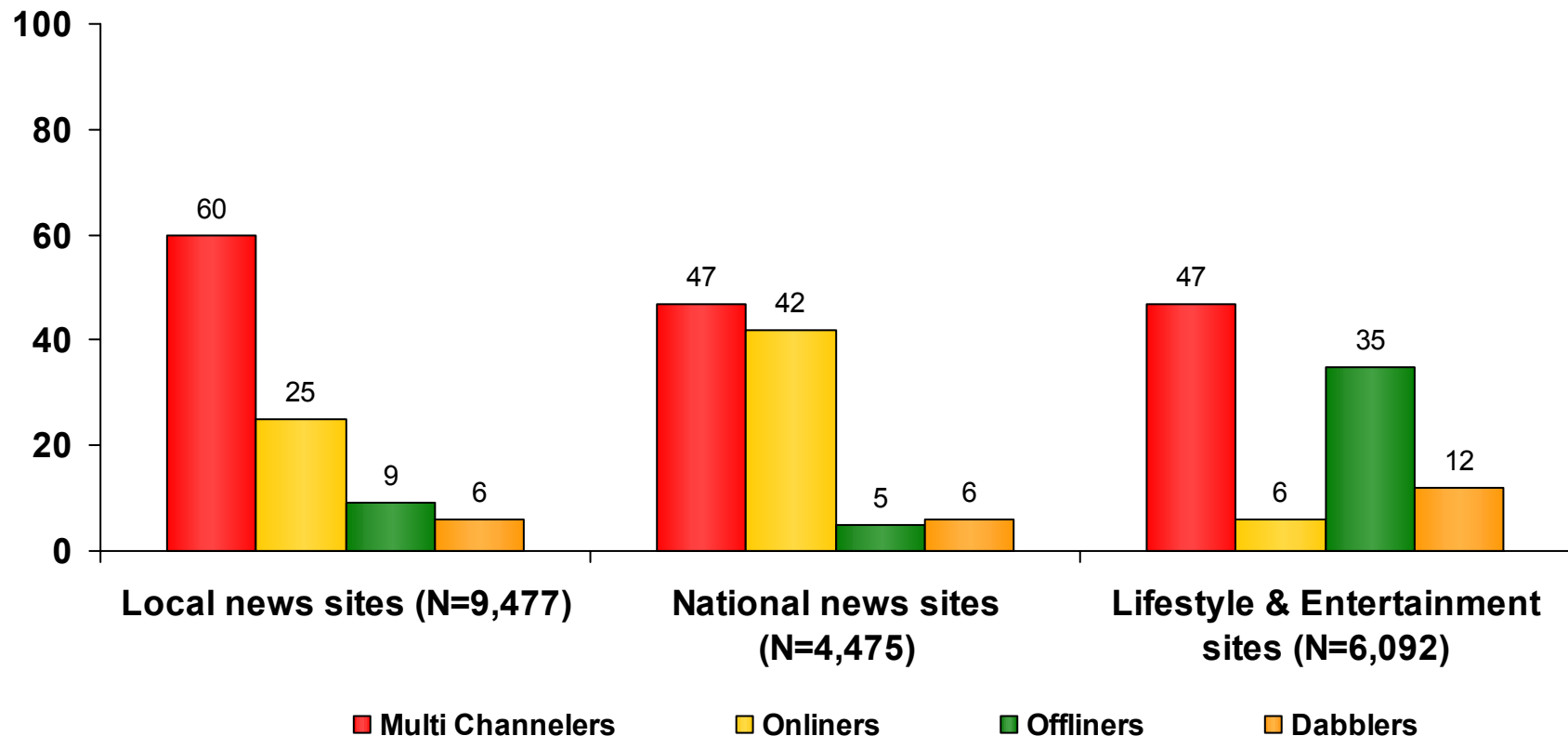
## Behavior

- 3% visit Web site routinely throughout the day
- 57% have high-speed Internet access at home and average Internet use is 18 hours/week
- Average TV viewing is 15 hours/week

# TV Sites Visited By More Multi Channelers Than Other Media



# Segment Distribution Varies By Content Category



# Executive Summary

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- In a short period of time, OPA members' branded content sites have become true destinations that are used routinely. In the eyes of visitors, these online brand properties are just as important as publishers' related offline brand properties.
- A majority of visitors regard online brand usage as a natural extension of their offline brand usage. Brand cannibalization between online and offline is minimal.
- In direct comparison, online brand properties are seen as superior in terms of functionality while offline properties offer more enjoyment. The level of trust and reliability is seen as equal.

# Implications

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- Advertisers can take advantage of considerable overlap in online/offline brand usage by developing effective cross-media messages.
- Advertiser messages should tap into the unique motivations of users to branded sites: Out of habit and for fun/relaxation.
- Some users of branded content Web sites do never or rarely visit the related offline property. This group needs to be specifically targeted through online advertising campaigns.

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