

Nielsen//NetRatings

The global standard for Internet audience measurement and analysis



The Online News Audience

Michael Pond
Media Analyst



Who IS the Audience?

- **How do you go about knowing your audience?**
- **What you need to know and why about who they are and how they “consume” online news?**
- **How do you serve and grow your audience?**



How do you go about knowing your audience?

- **Tools**
- **Techniques**
- **Data Analysis**
- **Other Strategies**



Techniques

- **Fielding**
 - **Panel**
 - **Random Digit Dial (RDD)**
 - **Online**
 - **Server**
 - **Random**
- **Collection**
 - **Meter**
 - **Survey**



Tools

- **Volumetric Measures**
- **Market Research**
- **Ad Planning**
- **Qualitative Measures**
- **Site Centric (Web) Analytics**



Volumetric Measures

- **Data Providers**
 - **Nielsen//NetRatings**
 - **Hitwise**
 - **Complementary Service**
 - **Search!!**
 - **Data is purchased from ISPs**
 - **ComScore**
 - **Direct competitor**
 - **Market Research**
 - **Most media clients use it for panel size and local reporting**



Why it is used...

- **Ad Sales**
 - The biggest number!!!
- **Competitive Benchmarking**
 - Less important
- **Strategic Research**
 - Least important



Market Research

- **Custom**
 - Forrester, etc
 - Strategic
 - Everything is a tool, they just sit on top of it
 - Answers “The Big Questions”
 - Highest \$\$ per project
- **Survey Research**
 - Harris, Greenfield, FGI, SSI, Etc
- **Models**
 - DIY (client builds it then turns it over)
 - Consultative (spec, serve, analyze)



Ad Planning Tools

- **Syndicated Studies**
 - MRI (magazine)
 - @Plan (internet)
 - Scarborough (newspapers)
- **Ad Tracking**
 - AdRelevance (internet)
- **Advertising Effectiveness**
 - Ad Servers
 - View through/click through
 - Dynamic Logic Style
 - Test and control methodology
 - Normative Database



Qualitative Tools

- **Focus Groups**
 - **Usability testing etc**
 - In person
 - Remote - Vivadence



Site Centric Analytics

- **Server Side Measurement**
 - “Tagging” or “Cookies”
 - **Measurement**
 - Audience: # of browsers by way of cookie
 - Pages: # of requests
 - **Providers**
 - Omniture
 - SiteCensus (N//NR)



Research Methods

- **Regression**
 - **Why Things Happen**
 - Relationship between multiple independent variables and a dependent variable
- **Segmentation**
 - **Who People Are**
 - Understanding the differences in the audience leads to better user experience



What you need to know and why, about who they are and how they “consume” online news?

- **Who they are...**
- **What they do...**
- **How's it changing...**



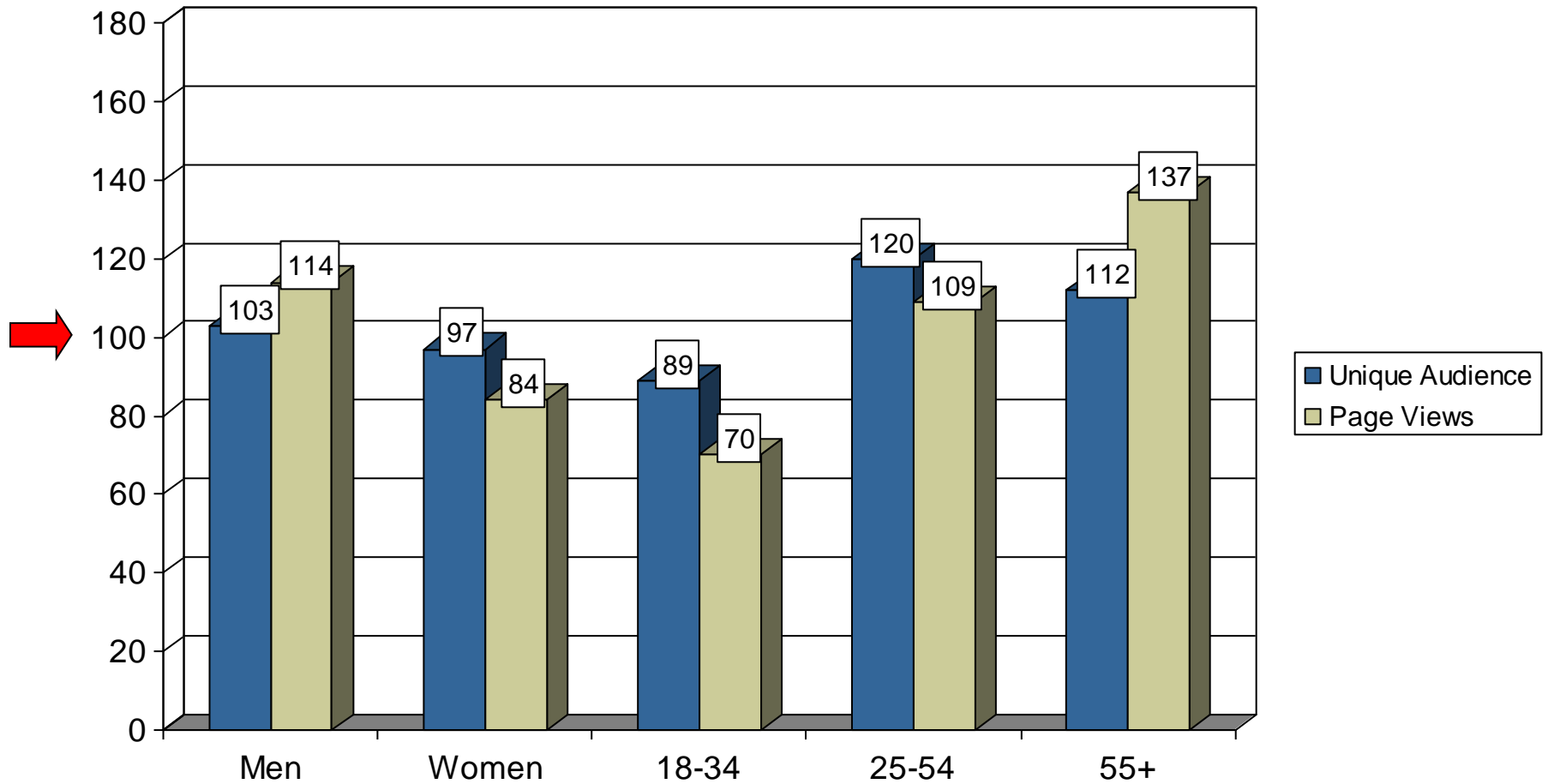
Online Audience Measurement

Top-line Audience Metrics

Current Events & Global News	Unique Audience [000]	Active Reach (%)	Universe Reach (%)	Total Sessions [000]	Sessions Per Person	Total Minutes [000]	Time Per Person (hh:mm:ss)	Total Web Page Views [000]	Web Pages Per Person
Combo	93,888	59.27	43.6	1,308,060	13.93	7,647,492	1:21:27	8,048,950	86
Home	74,072	49.86	34.82	642,004	8.67	3,175,227	0:42:52	3,378,859	46
Work	47,476	76.62	71.27	666,056	14.03	4,472,266	1:34:12	4,670,091	99

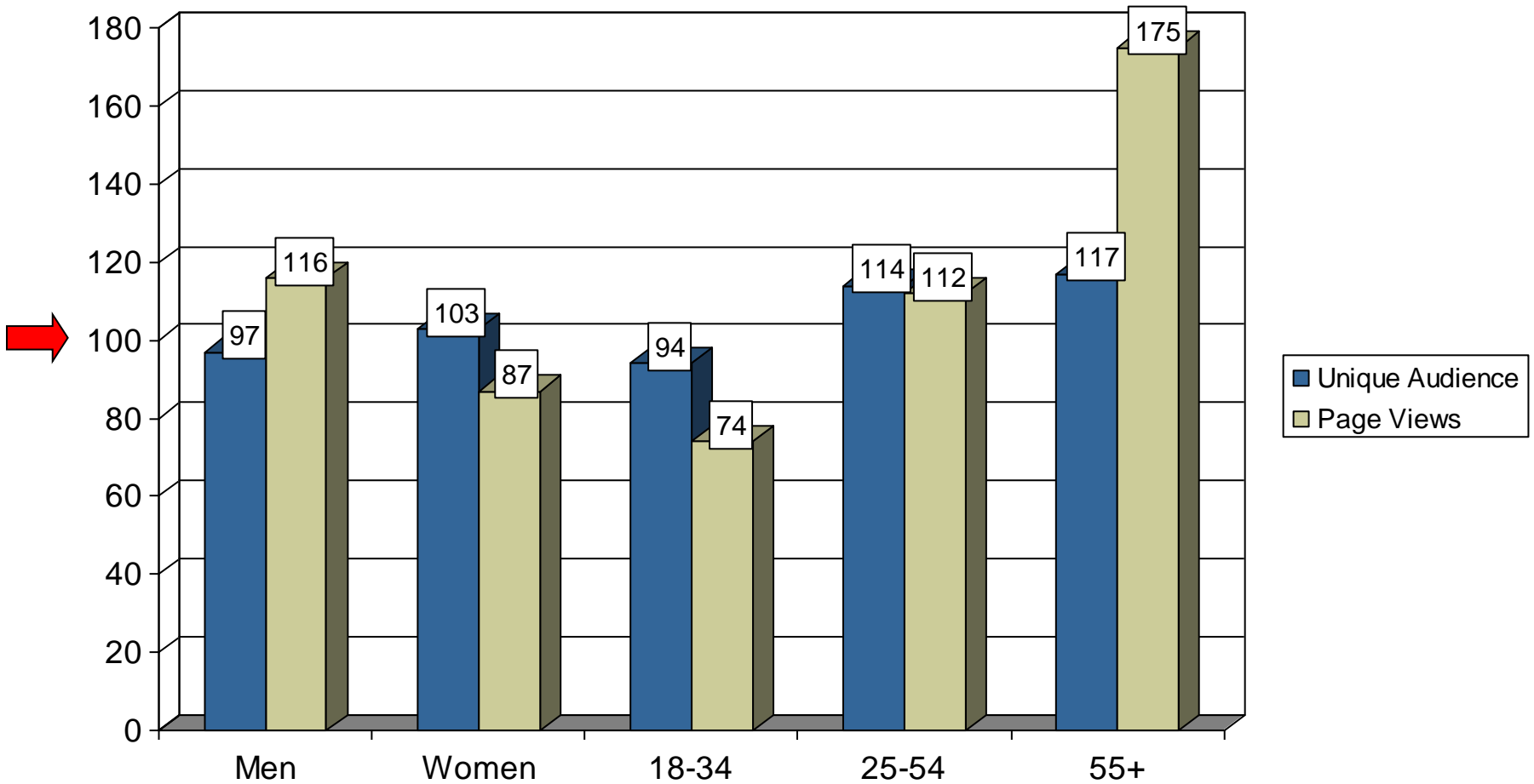


Current Events & Global News Index Against Total Online Population





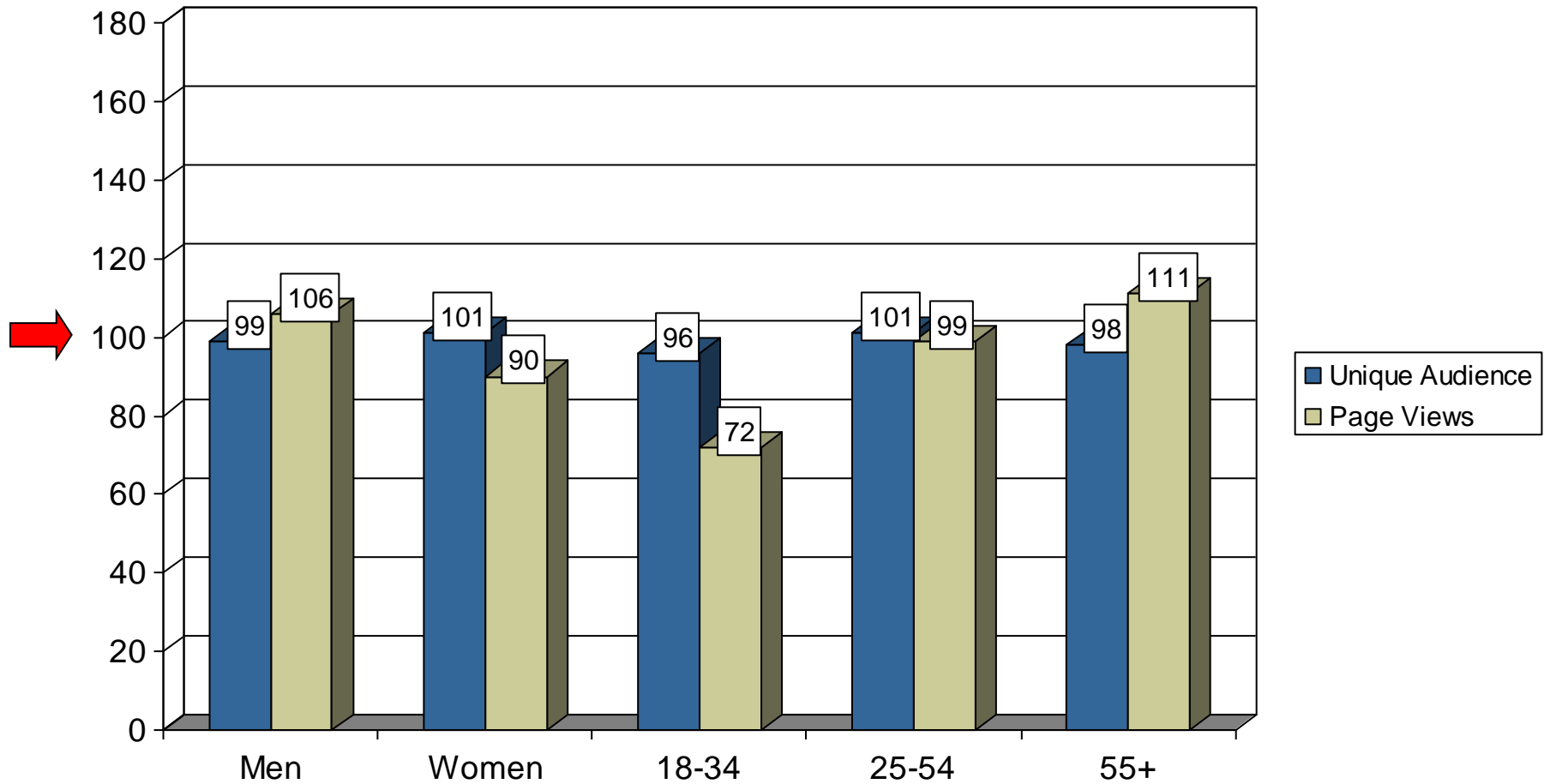
Current Events & Global News Index Against Total Online Population



Source: Nielsen//NetRatings NetView Service, Home, August 2007

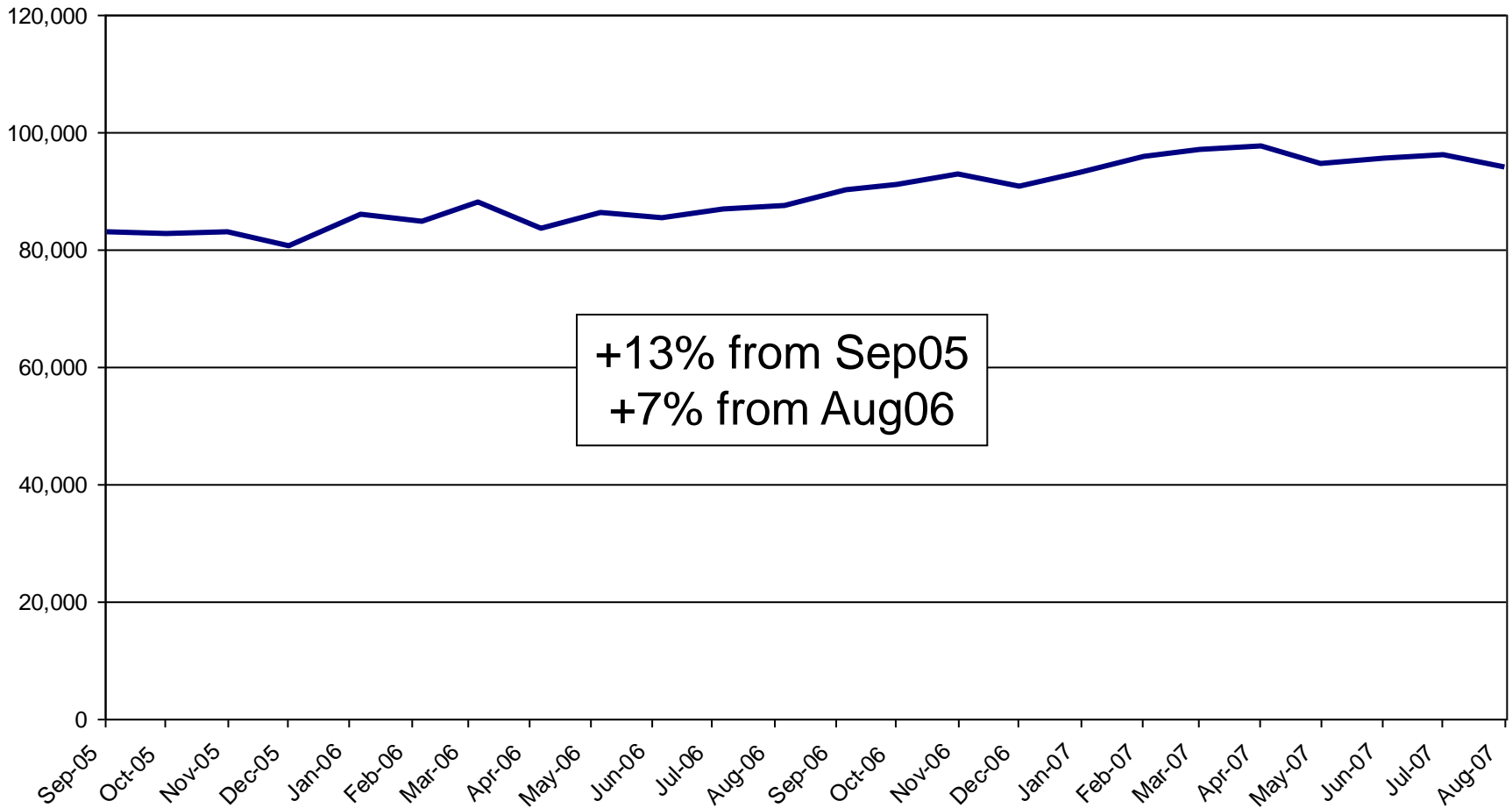


Current Events & Global News Index Against Total Online Population





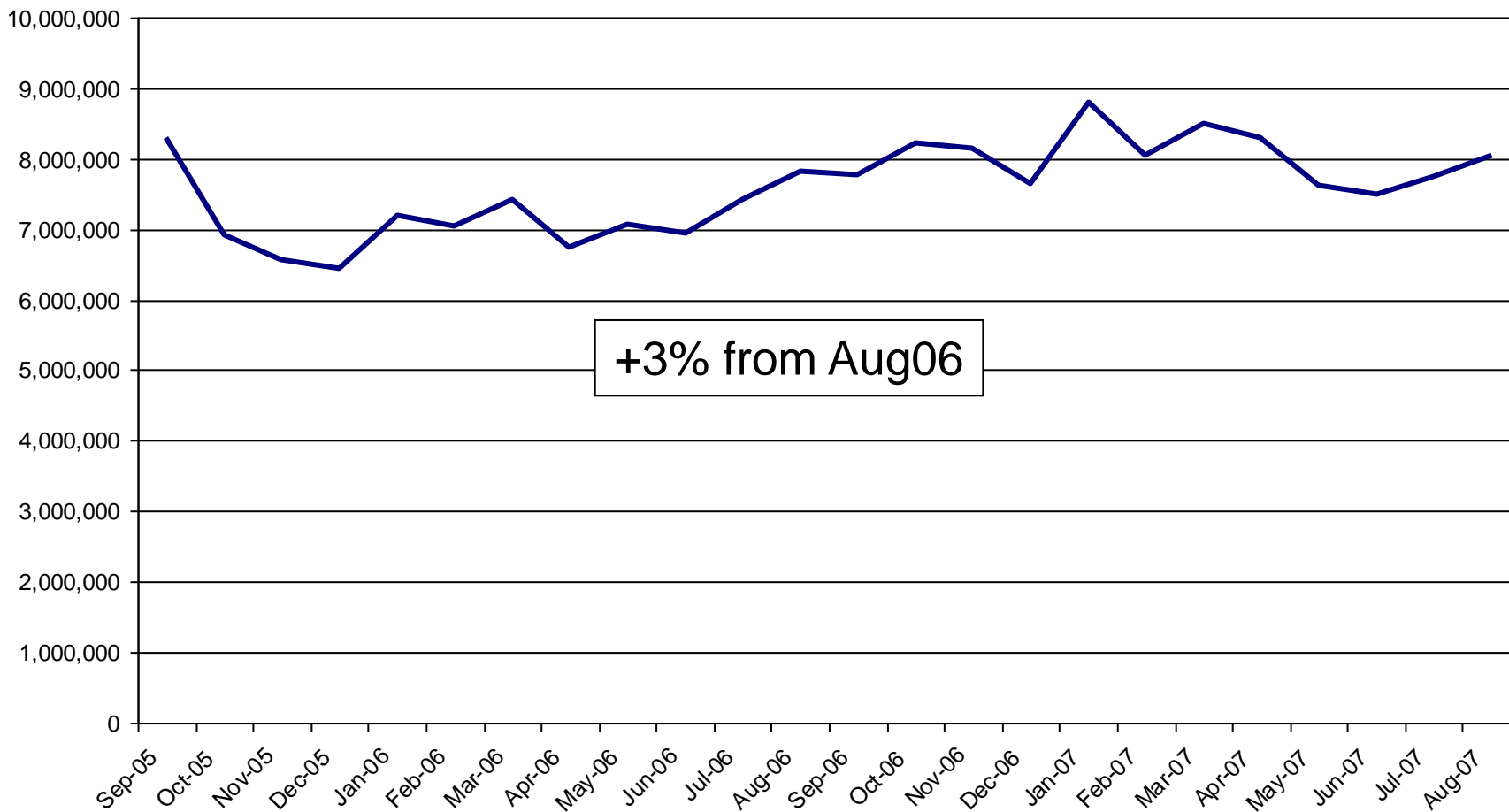
Current Events & Global News Unique Audience (000) Trend



+13% from Sep05
+7% from Aug06



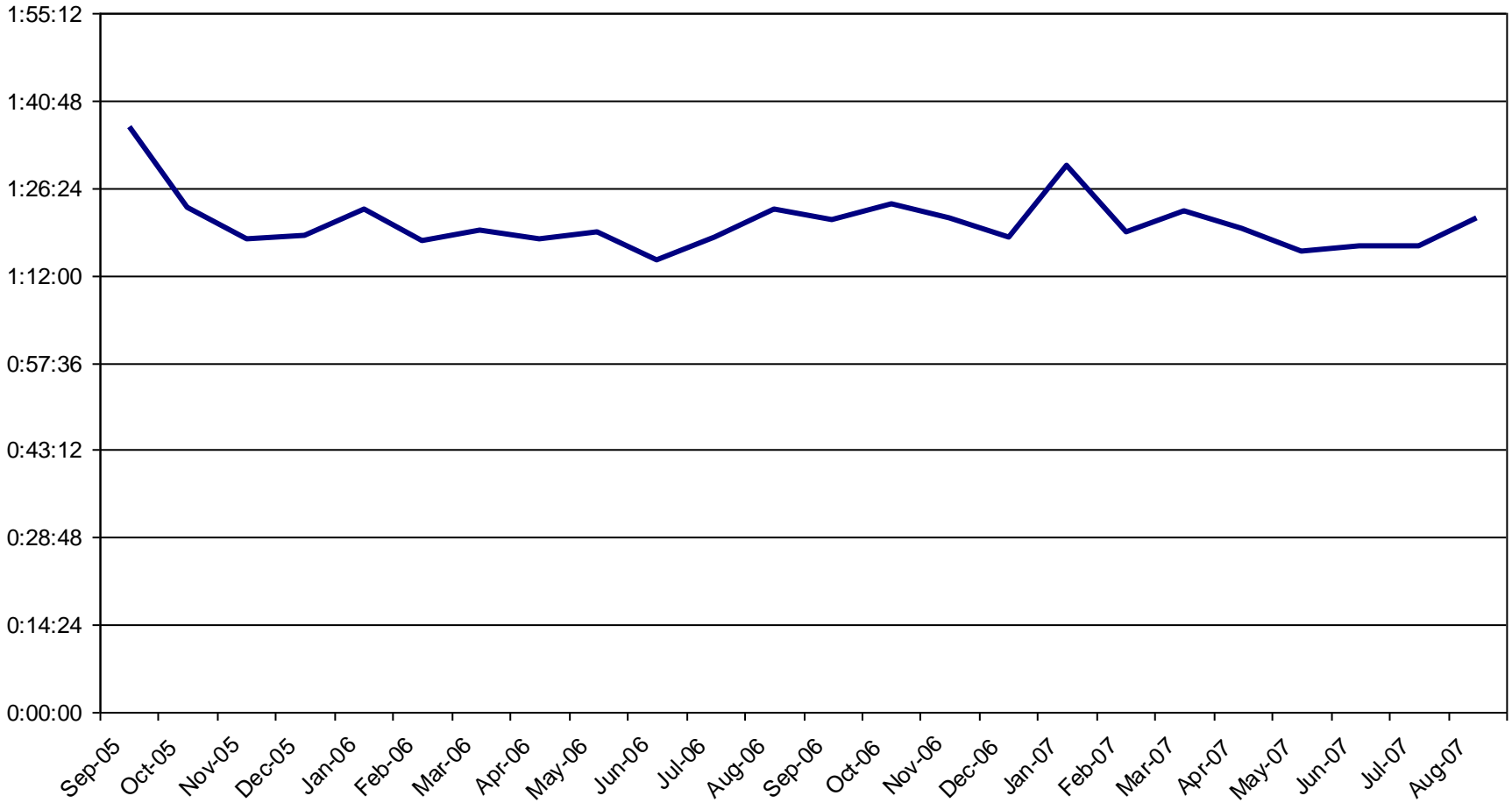
Current Events & Global News Page Views (000) Trend



+3% from Aug06



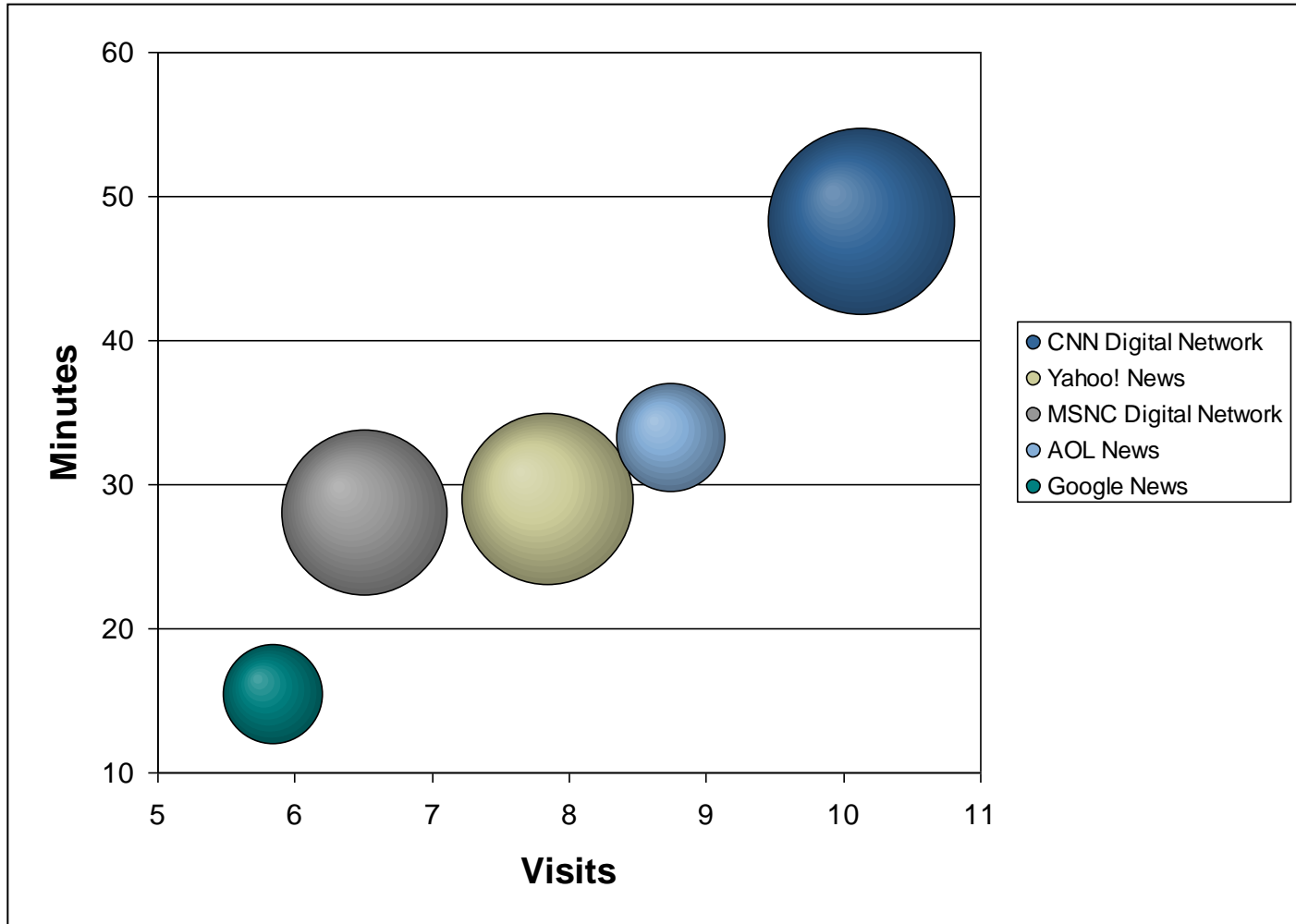
Current Events & Global News Time-per-person Trend



Source: Nielsen//NetRatings NetView Service

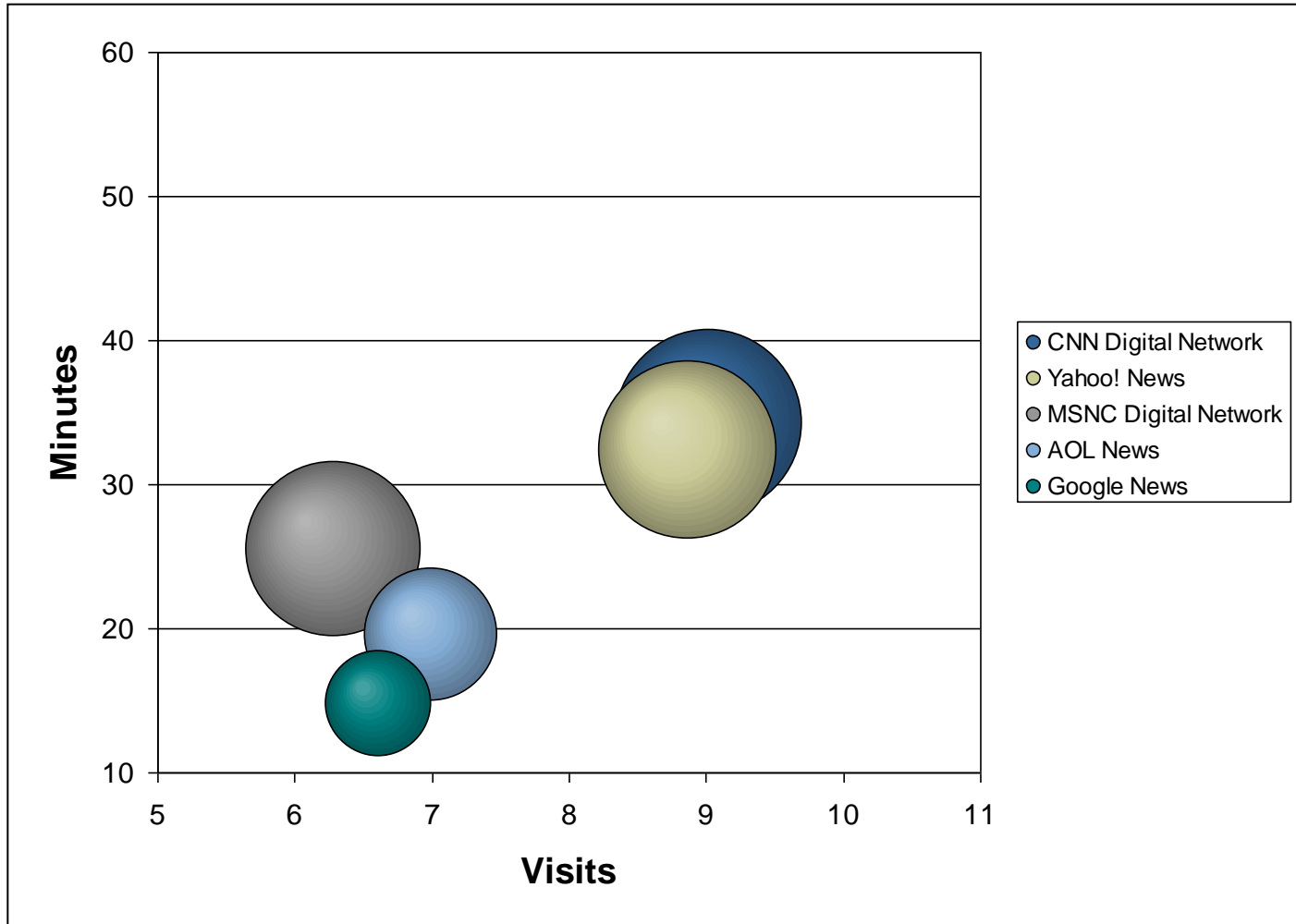


Shift in Engagement Loyalty Matrix August 06



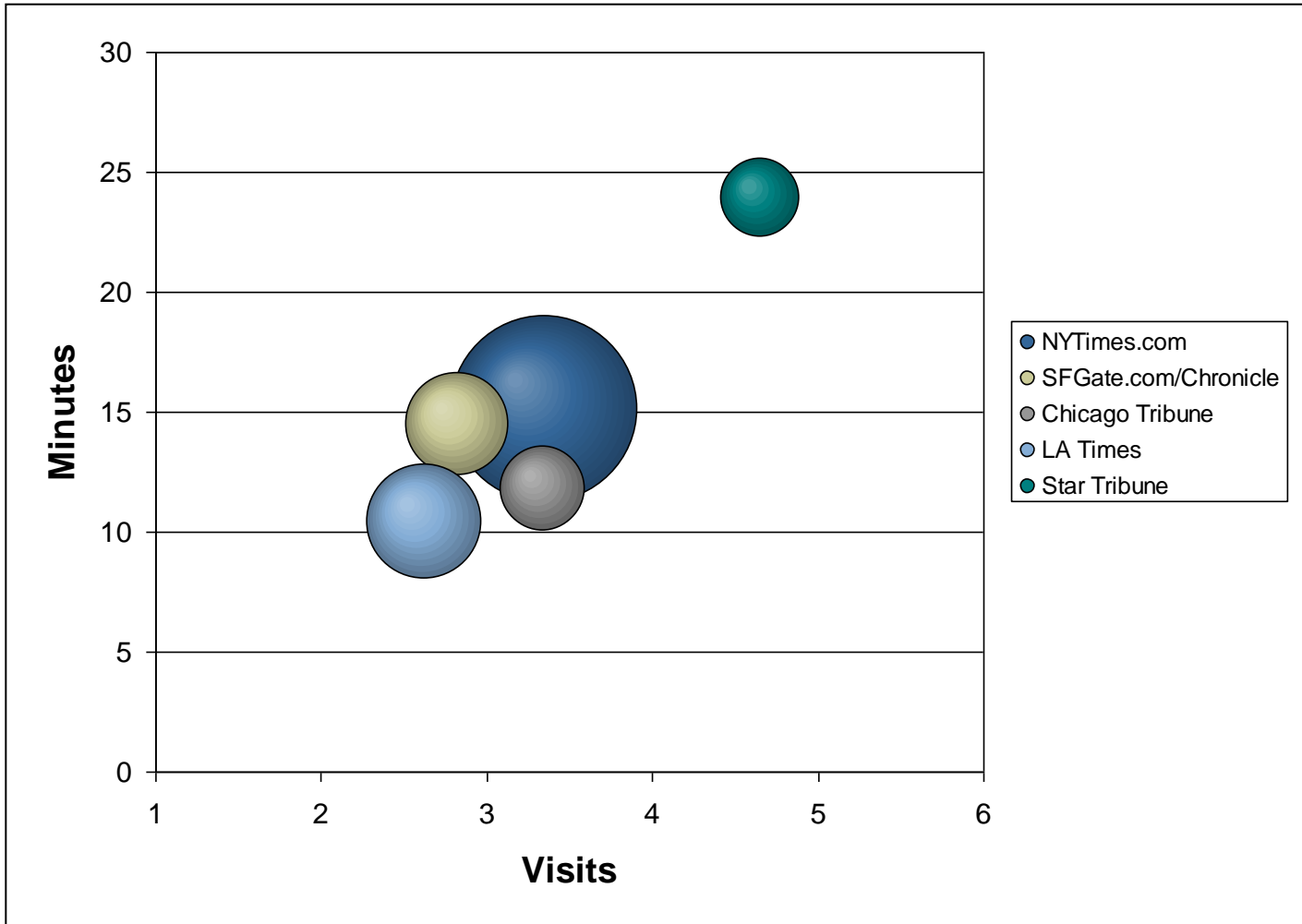


Shift in Engagement Loyalty Matrix August 07





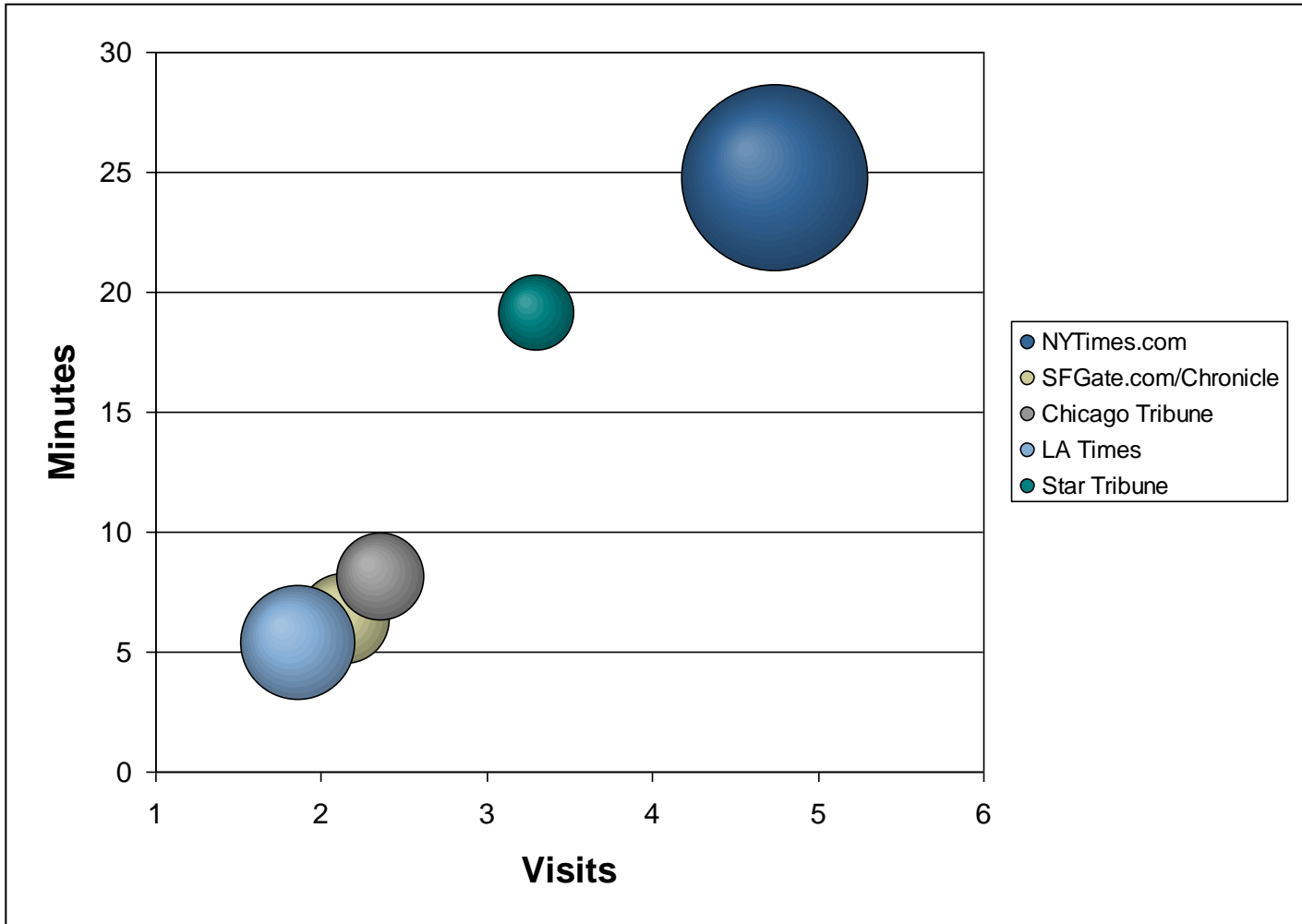
Local Story Impact August 07



Source: Nielsen//NetRatings NetView Service. Home, August 2007



Local Story Impact August 07



Source: Nielsen//NetRatings NetView Service. Work, August 2007

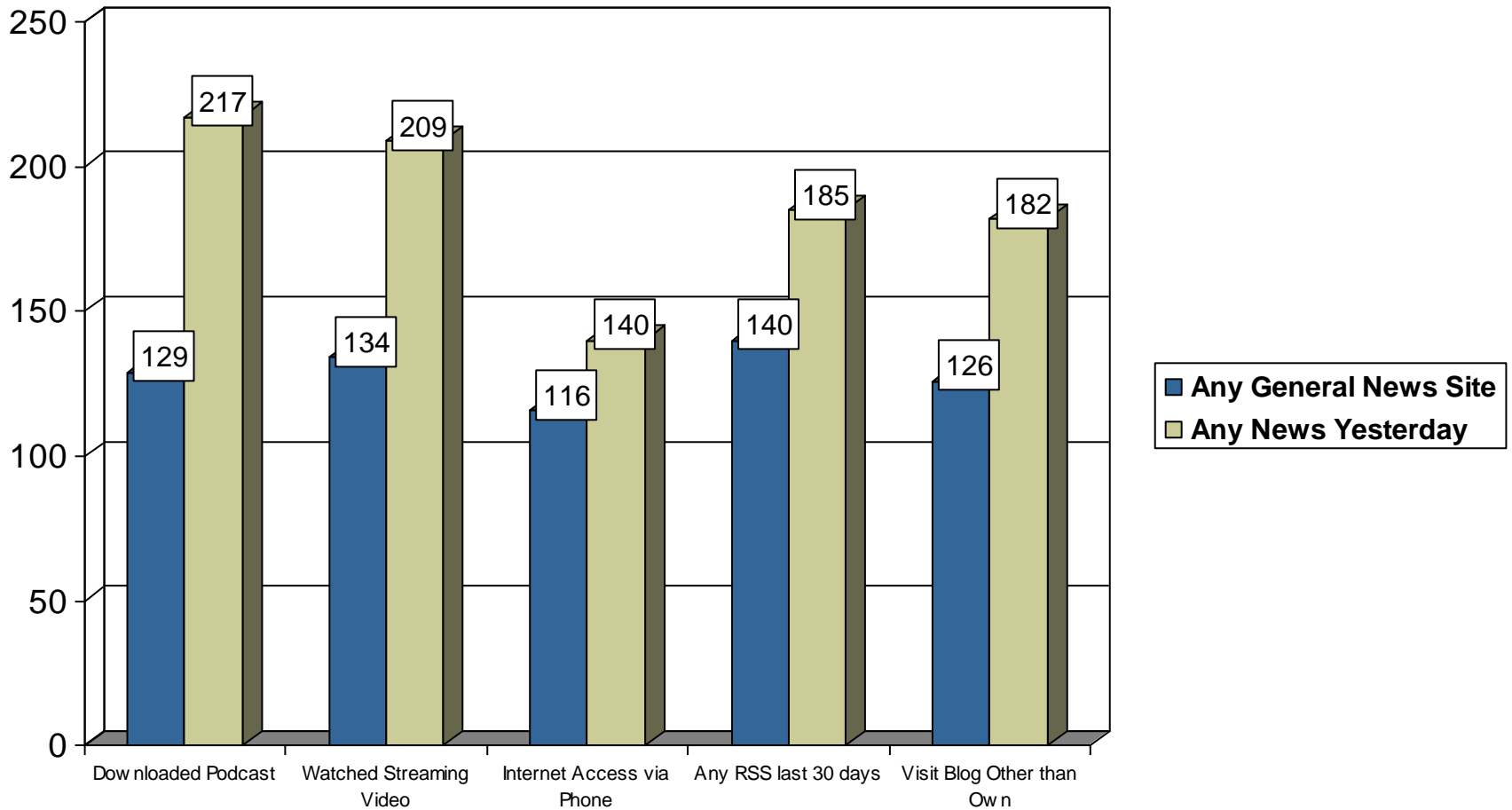


Targeted/Lifestyle Behavior

- **Online News Audience Profile**
 - **59.5% Visited a General News Site**
 - **34.5% Read Any News Online –Yesterday**
 - **18.7% Primarily Read Newspaper Online**
 - **16.3% No Newspaper Read Yesterday**

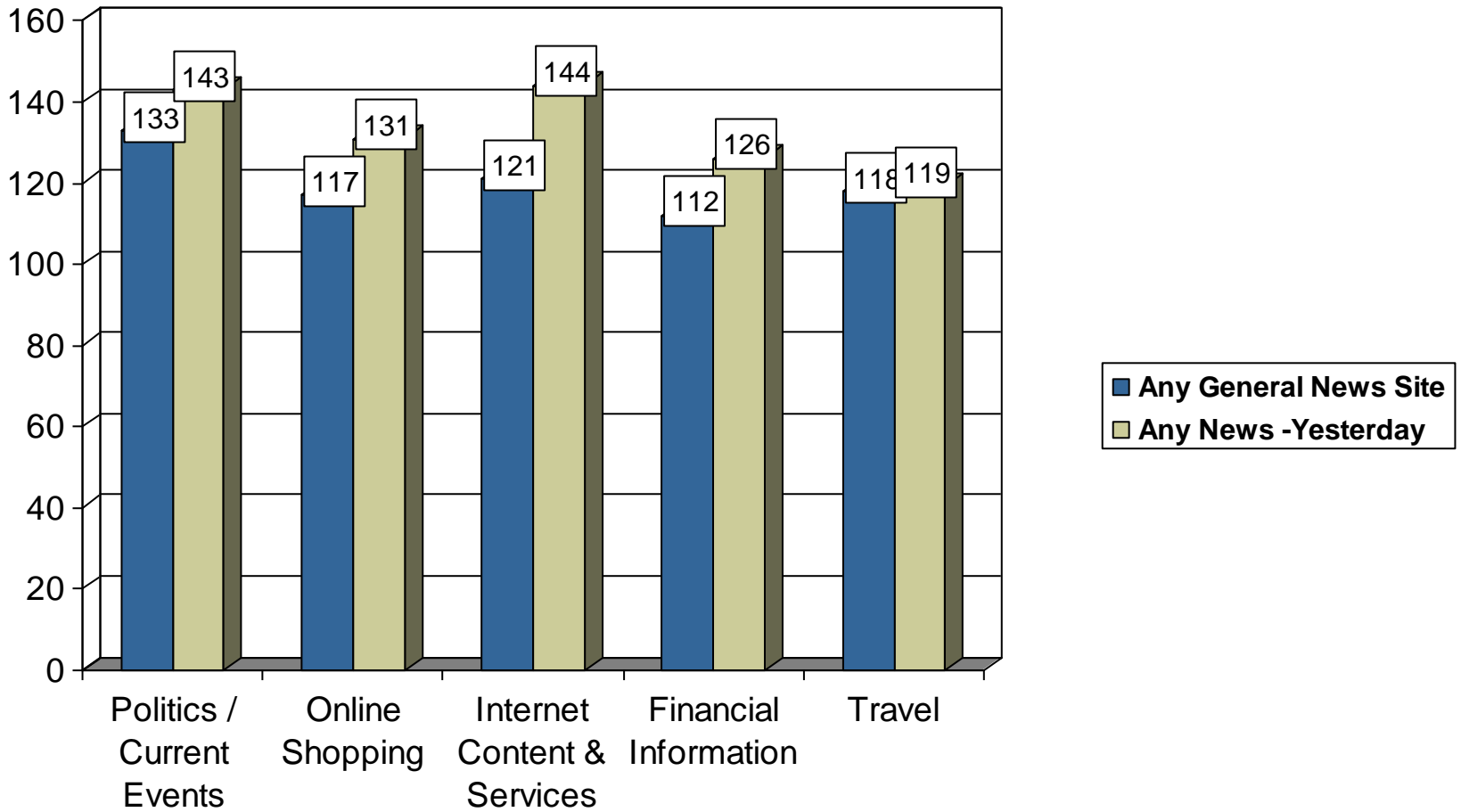


Online News Consumers Activities Yesterday



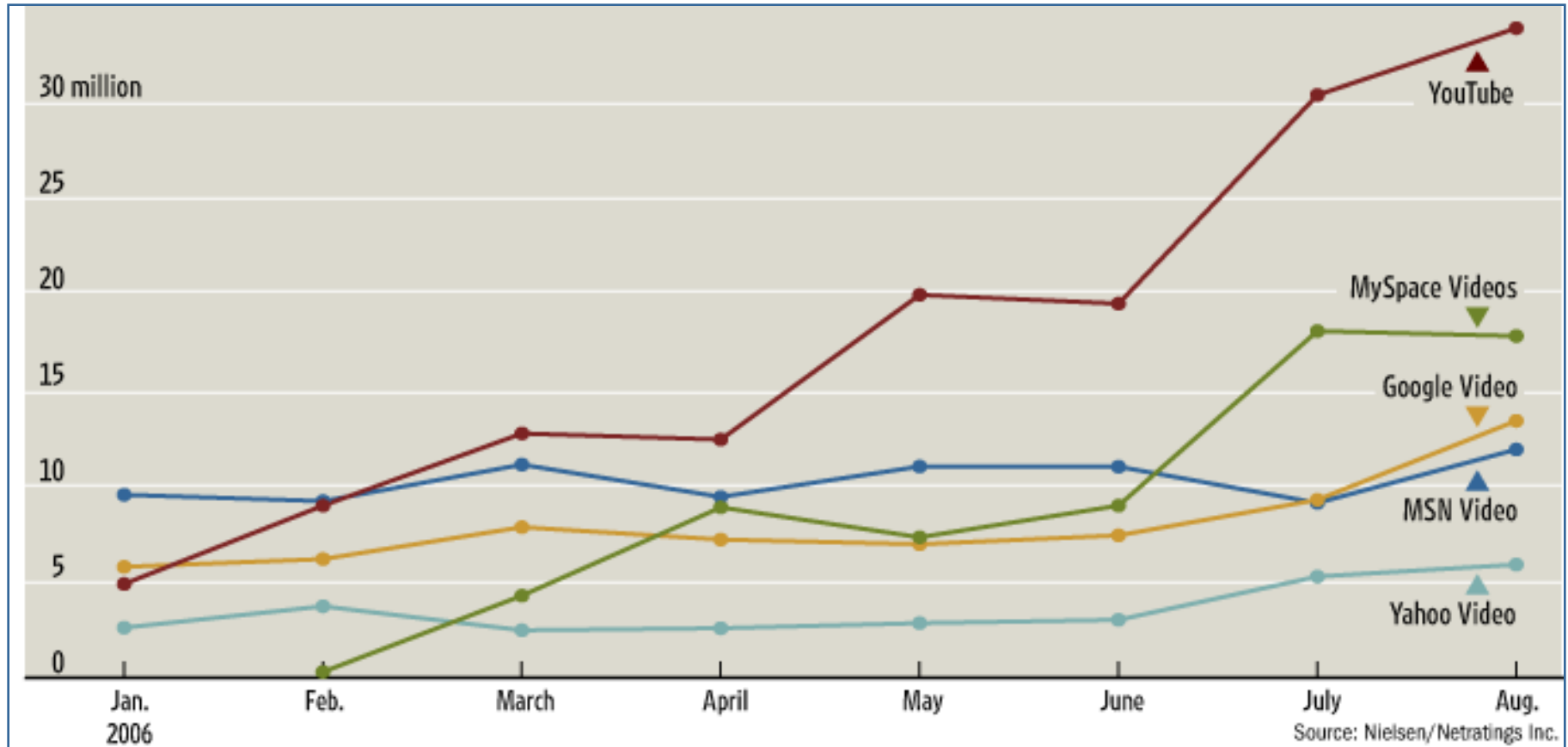


Online News Consumers Frequently Provide Advice On...





Growth in Video Content



Emergence of “My.Internet” or “Web2.0”

- “My.Internet” are websites that put the control of the content, either user generated or not, in the hands of the consumers. These sites allow consumers to define their own online experience through technology such as RSS or content genres such as blogs and social networking.

The logo for Flickr, featuring the word "flickr" in a blue, lowercase, sans-serif font. Above the "i" in "flickr" is the word "GAMMA" in a smaller, grey, uppercase font.The logo for Myspace.com, consisting of a blue rectangular background. On the left, there are three white stylized human figures. To the right, the text "myspace.com" is written in white, lowercase, sans-serif font. Below it, the tagline "a place for friends" is written in a smaller white font.The logo for YouTube, featuring the word "You" in black and "Tube" in white inside a red rounded rectangle. To the right of the red rectangle is the text "Broadcast Yourself" in a grey, sans-serif font.The logo for Topix.net, featuring the text "topix.net" in white, lowercase, sans-serif font, centered within an orange rectangular background.The logo for Digg, featuring the word "digg" in white, lowercase, sans-serif font, centered within a blue rectangular background.The logo for Facebook, featuring the word "facebook" in white, lowercase, sans-serif font, centered within a blue rectangular background.The logo for del.icio.us, featuring a square icon on the left composed of four smaller squares (top-left is blue, top-right is black, bottom-left is black, bottom-right is grey). To the right of the icon is the text "del.icio.us" in a black, sans-serif font.The logo for Frappr! Beta, featuring the word "Frappr!" in a colorful, stylized font (F is blue, r is red, a is green, p is yellow, p is orange, r is purple). Below it, the word "Beta" is written in a smaller, blue font.The logo for Windows Live Beta, featuring the Windows logo (four colored panes: red, green, blue, yellow) on the left. To the right, the text "Windows Live" is written in black, sans-serif font, with "Beta" in red below it.

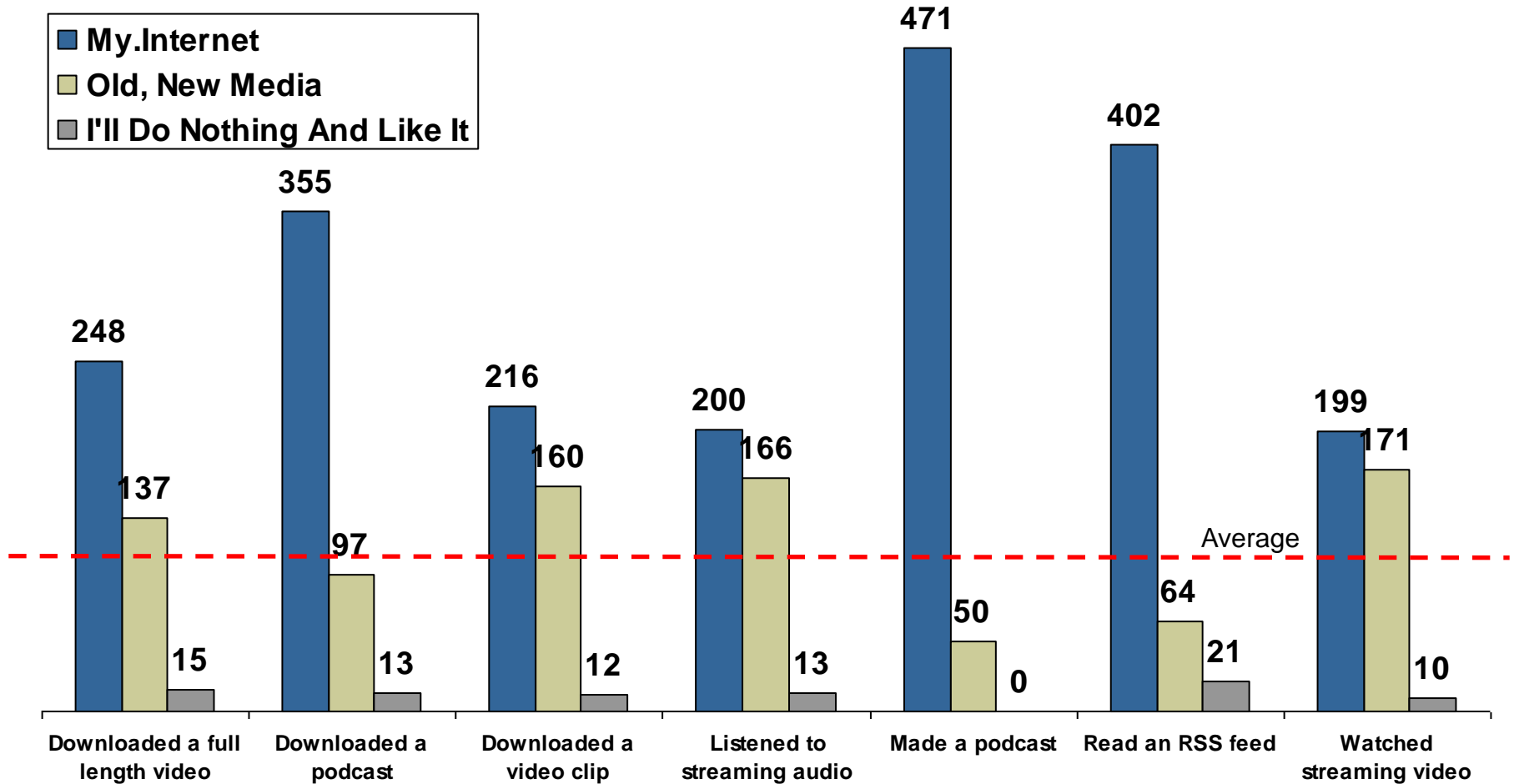


So Who Are These People?

- **Clicked on an online advertisement**
- **Downloaded a full length video, such as a TV show or movie**
- **Downloaded a podcast**
- **Downloaded a video clip**
- **Listened to streaming audio**
- **Made a podcast**
- **Participated in an online community, such as MySpace, Friendster, LinkedIn or Facebook**
- **Posted a blog**
- **Read a blog**
- **Read an RSS feed**
- **Watched streaming video**

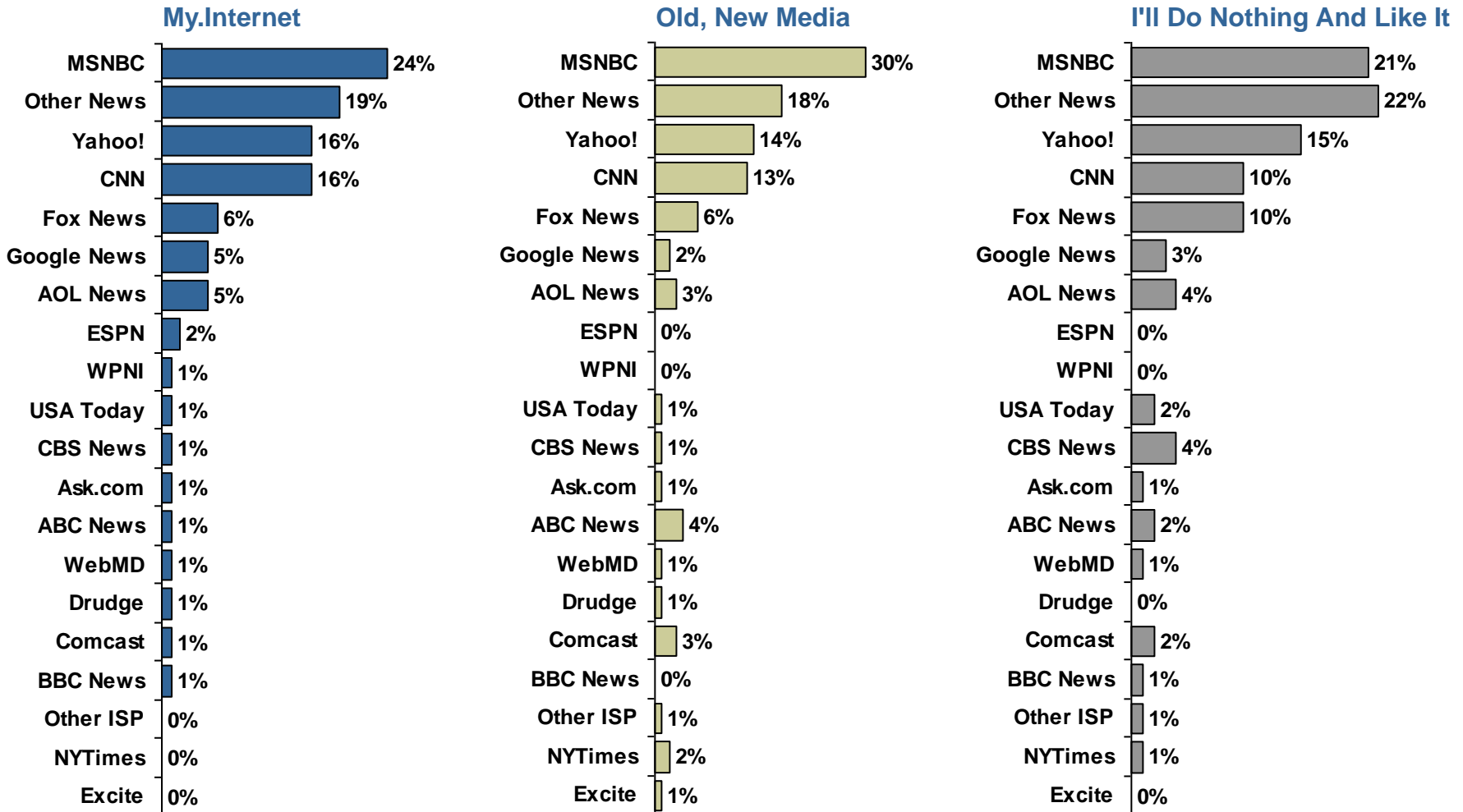
How Are They Consuming Media Online?

Metric: Index against overall respondent average



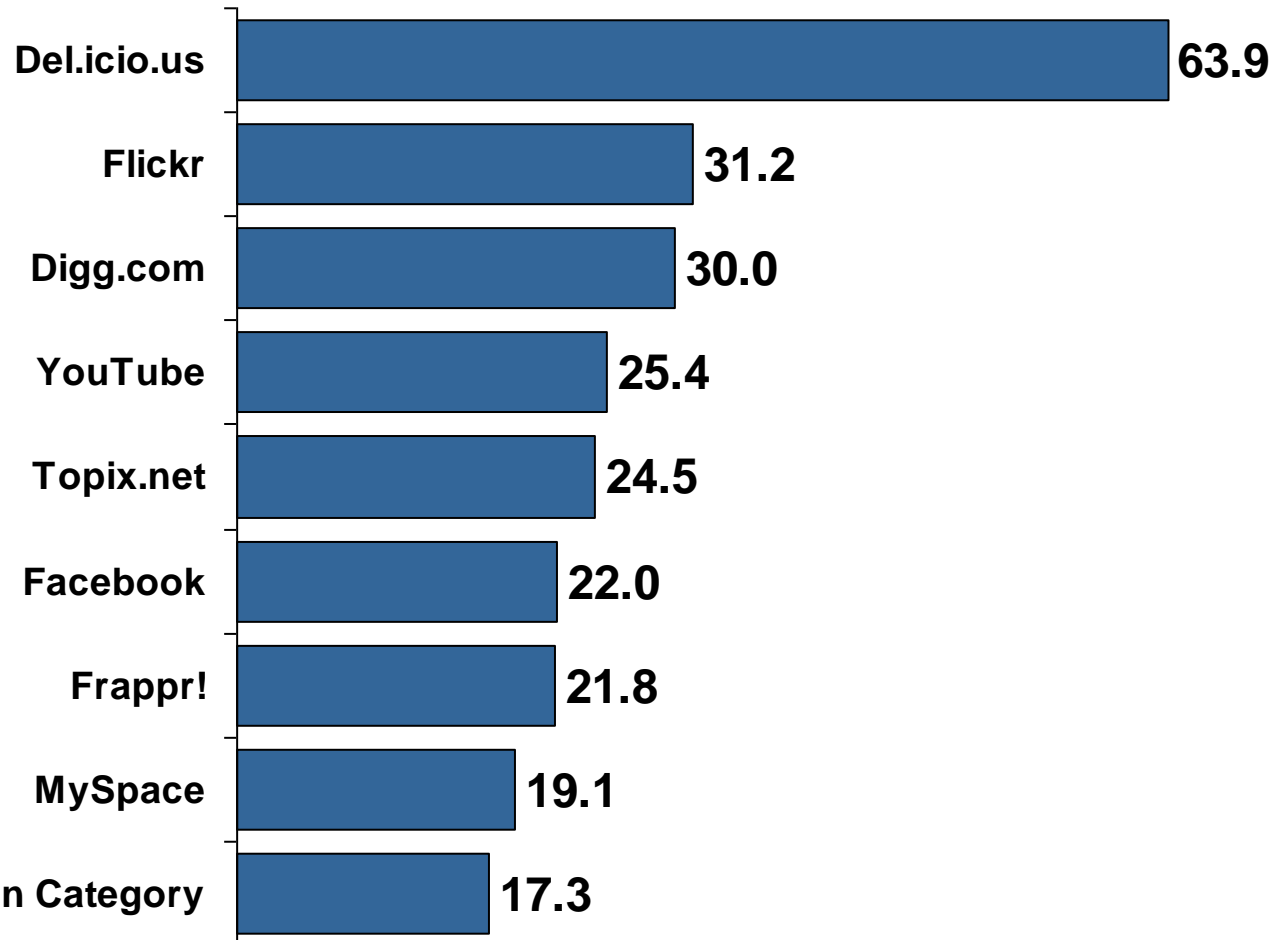
For The Most Part My.Internet Likes The Same Sites As Everyone Else

Q: What is your favorite news and information website? (Open ended)



Loyalty, However, Is Not Their Strong Suit

Metric: Number of News and information sites visited by visitor to "Brand A"





Key Finding: Be Not Afraid

- **There is a new class of Internet users, but it turns out that they are pretty much the same as the old ones.**
- **They...**
 - Are younger and more internet media centric
 - Are more engaged
 - Less loyal than average
 - Seem to like the same sites as everyone else
- **For Publishers: The winners will let them be in control of both content and their advertising experience.**



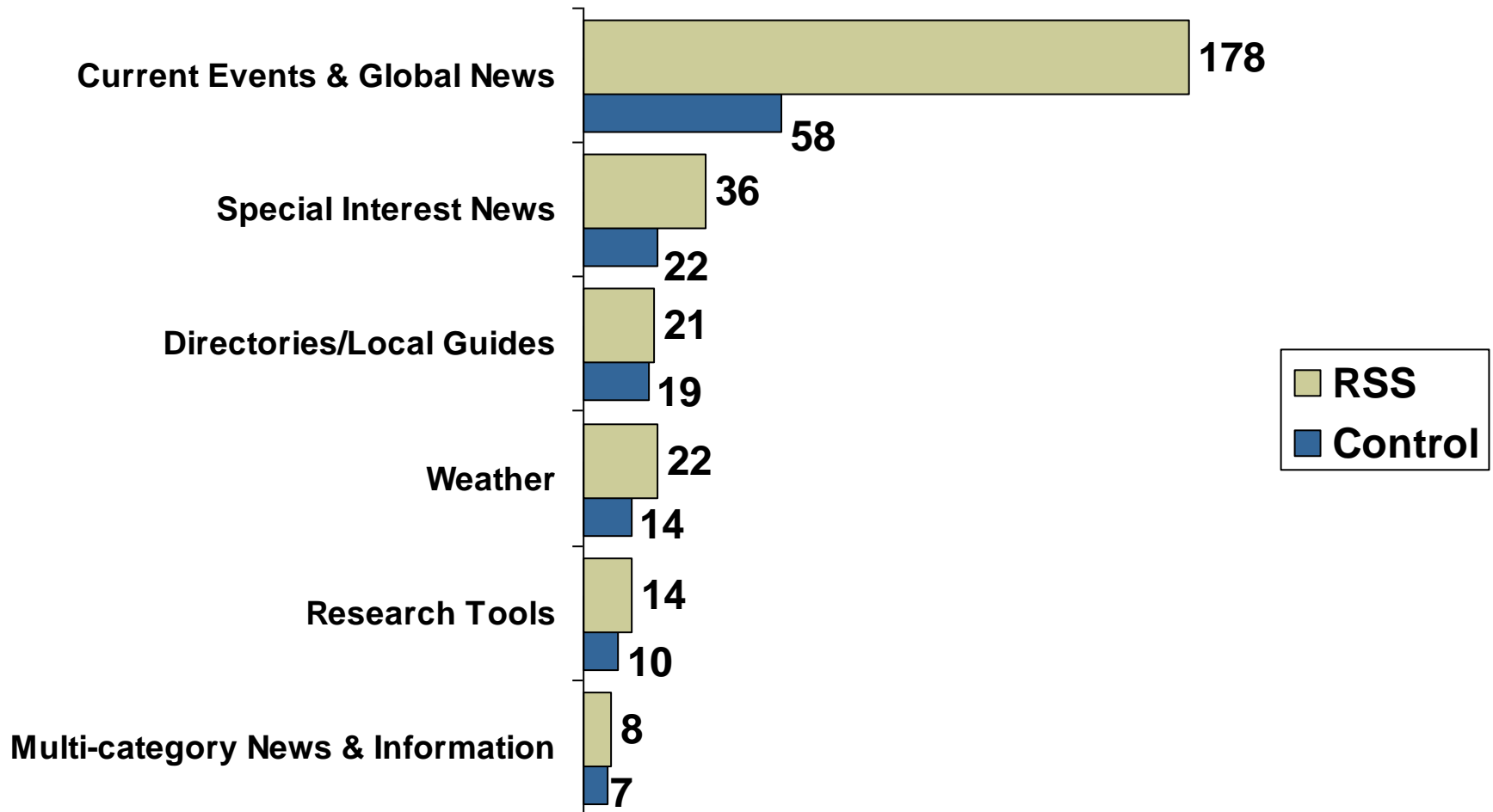
The Effects Of RSS On News Sites

- **What The Heck Is RSS Doing To My Site?**

“I used RSS as a novelty at first, now find the data aggregation it provides time saving. I have a couple of sites I trust, but I’ve been expanding.”

RSS Users Aggressively Use Current Events and Global News Information

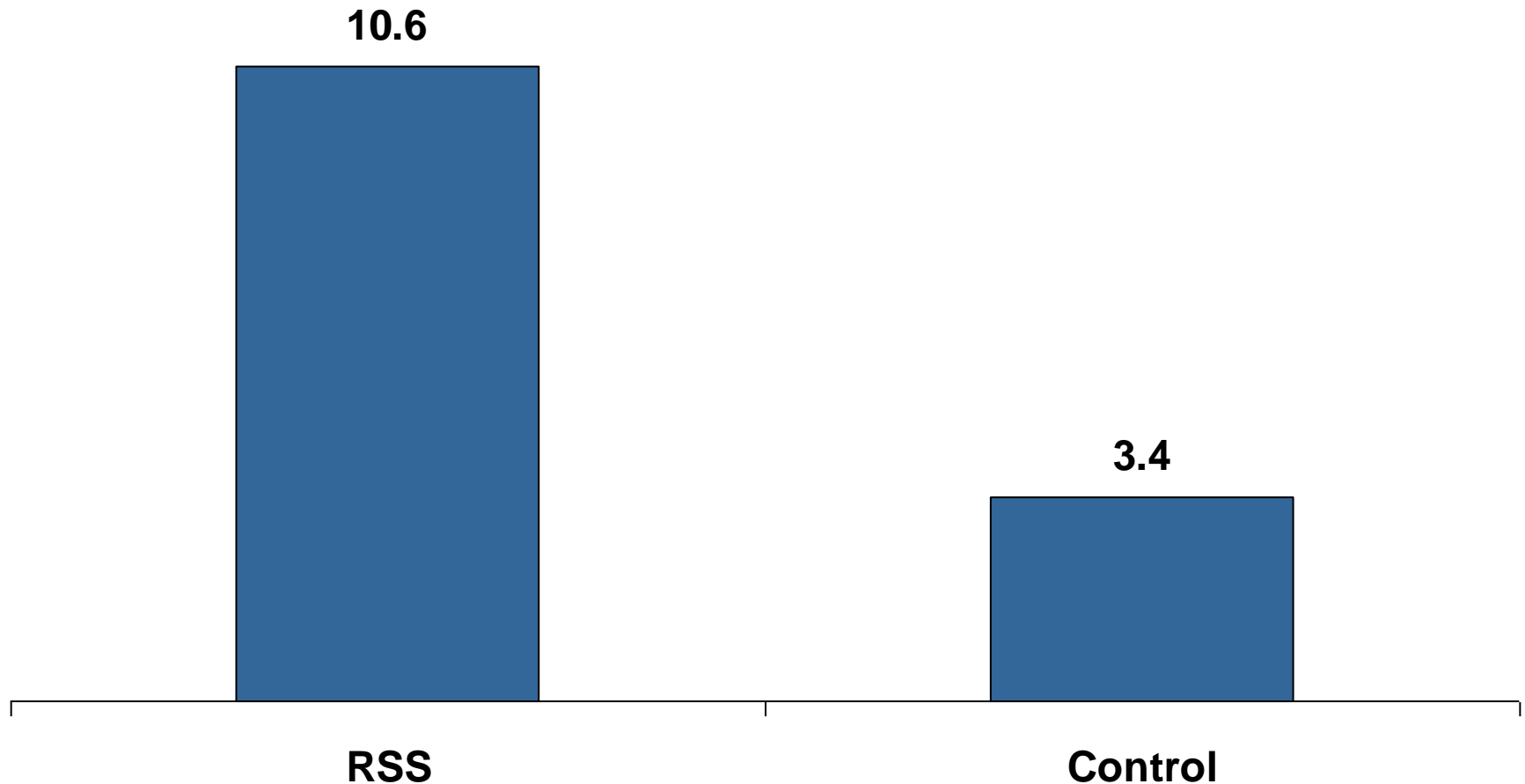
Metric: Minutes per month





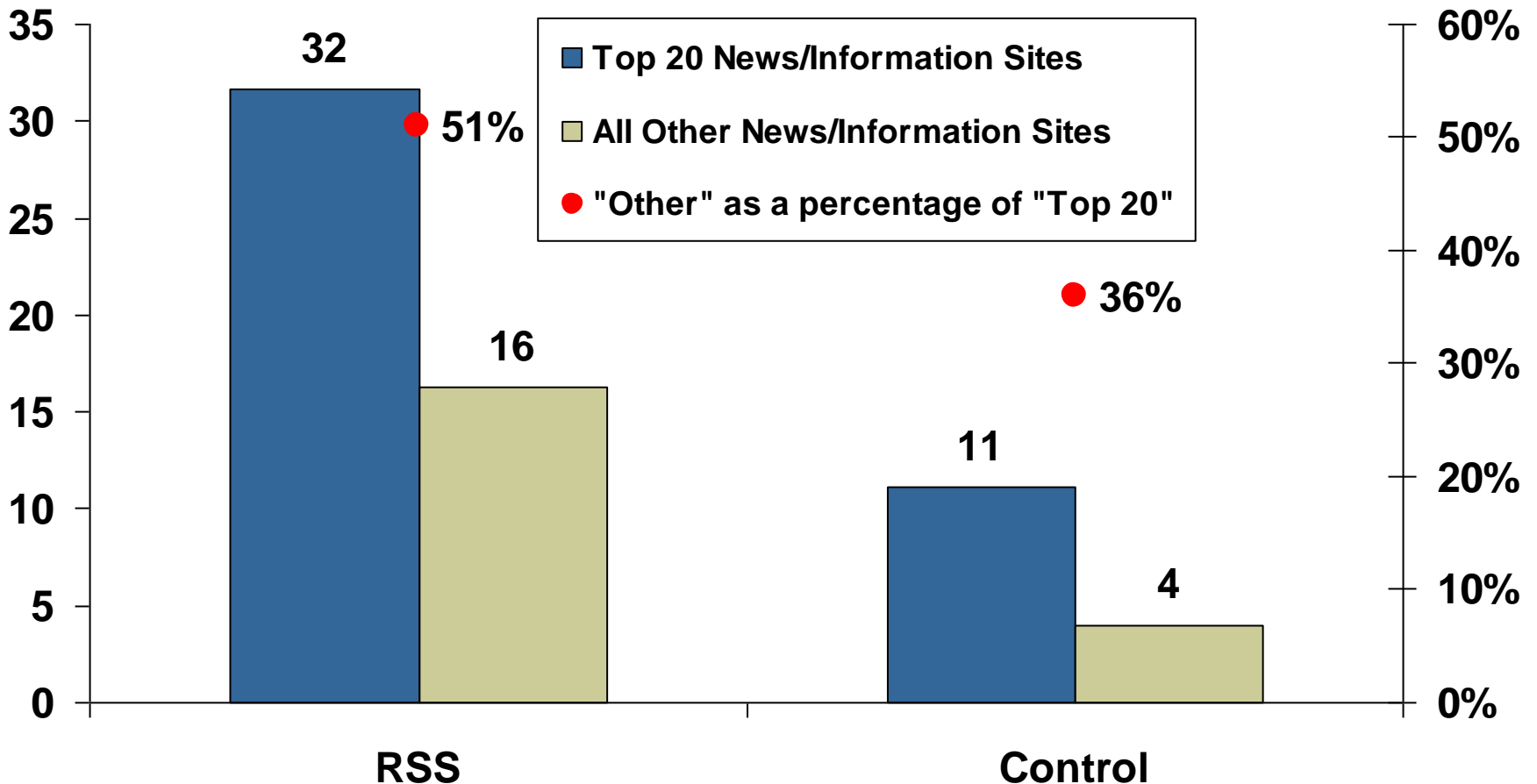
RSS Users Tend To Visit 3 Times As Many News Sites As Non-Users

Metric: Average number of Current Events and Global News sites visited in a month



While They Still Read The Top Media Sites, RSS Users Expand Outside Of The Top 20

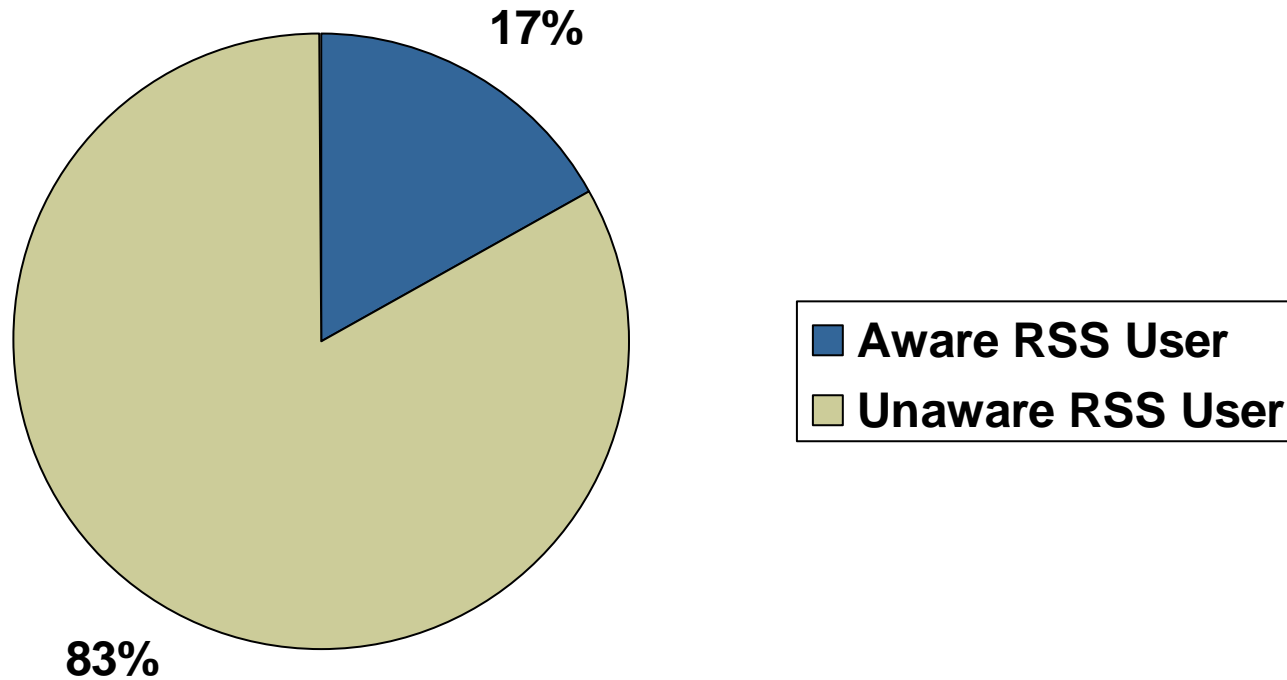
Metric: Visits per person per month





Most RSS Users Do Not Even Know They Are Using RSS

Metric: Percent of behavioral RSS users who answer that they use RSS



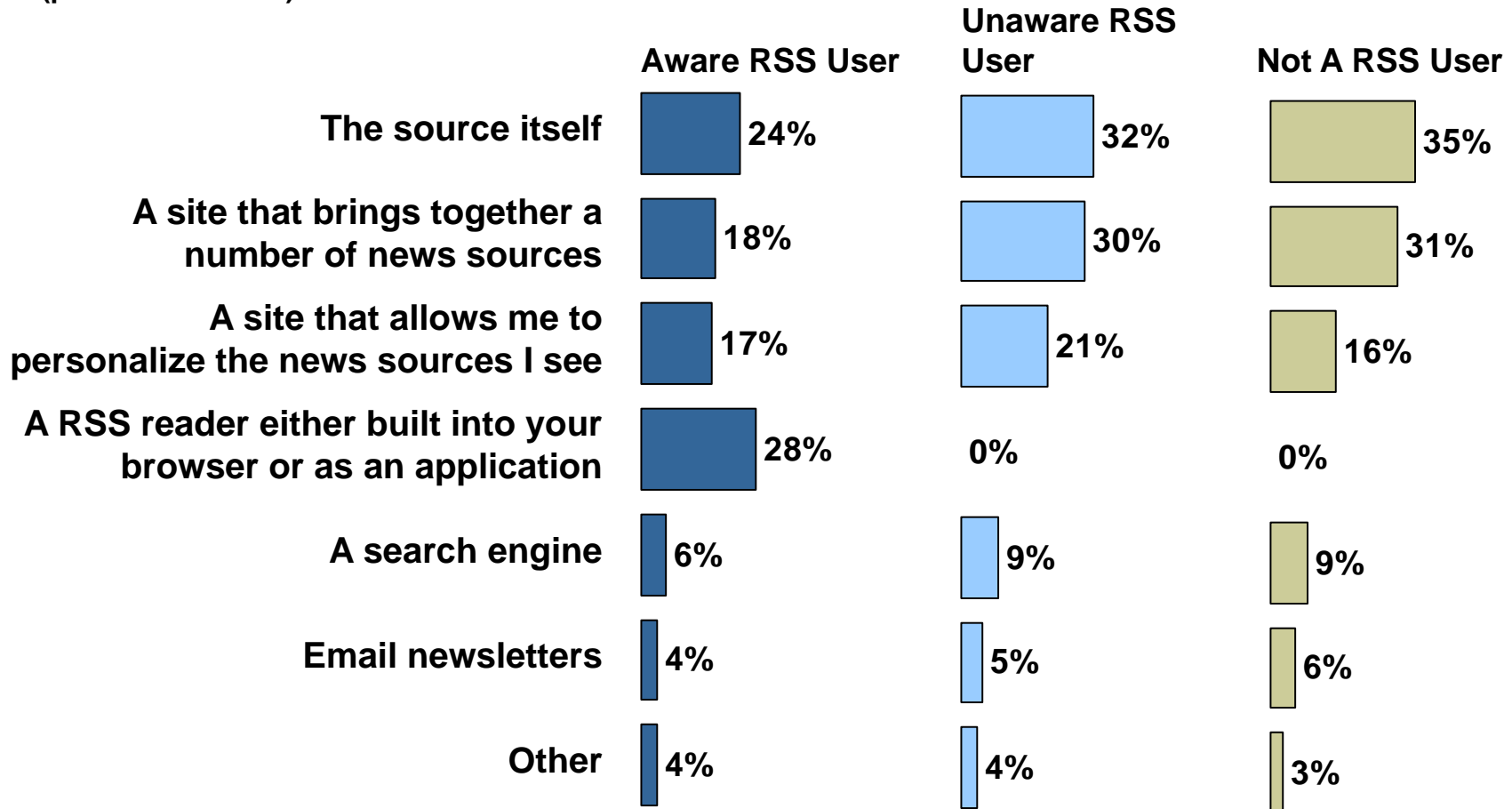
RSS Awareness is Reflected in Length Of Online Tenure and Gender

Aware Of RSS Use

		Uses RSS	
		Yes	No
Aware Of RSS Use	Yes	<p>78% Male</p> <p>48% Online before '94</p> <p>46% College Grad+</p> <p>25% \$100k +</p> <p>17% Uses Gecko Engine Web Browsers (FireFox, Netscape etc)</p> <p>17% 18 to 34 Years Old</p>	
	No	<p>54% Male</p> <p>36% Online before '94</p> <p>53% College Grad+</p> <p>27% \$100k +</p> <p>15% Uses Gecko Engine Web Browsers (FireFox, Netscape etc)</p> <p>25% 18 to 34 Years Old</p>	<p>46% Male</p> <p>34% Online before '94</p> <p>43% College Grad+</p> <p>22% \$100k +</p> <p>5% Uses Gecko Engine Web Browsers (FireFox, Netscape etc)</p> <p>16% 18 to 34 Years Old</p>

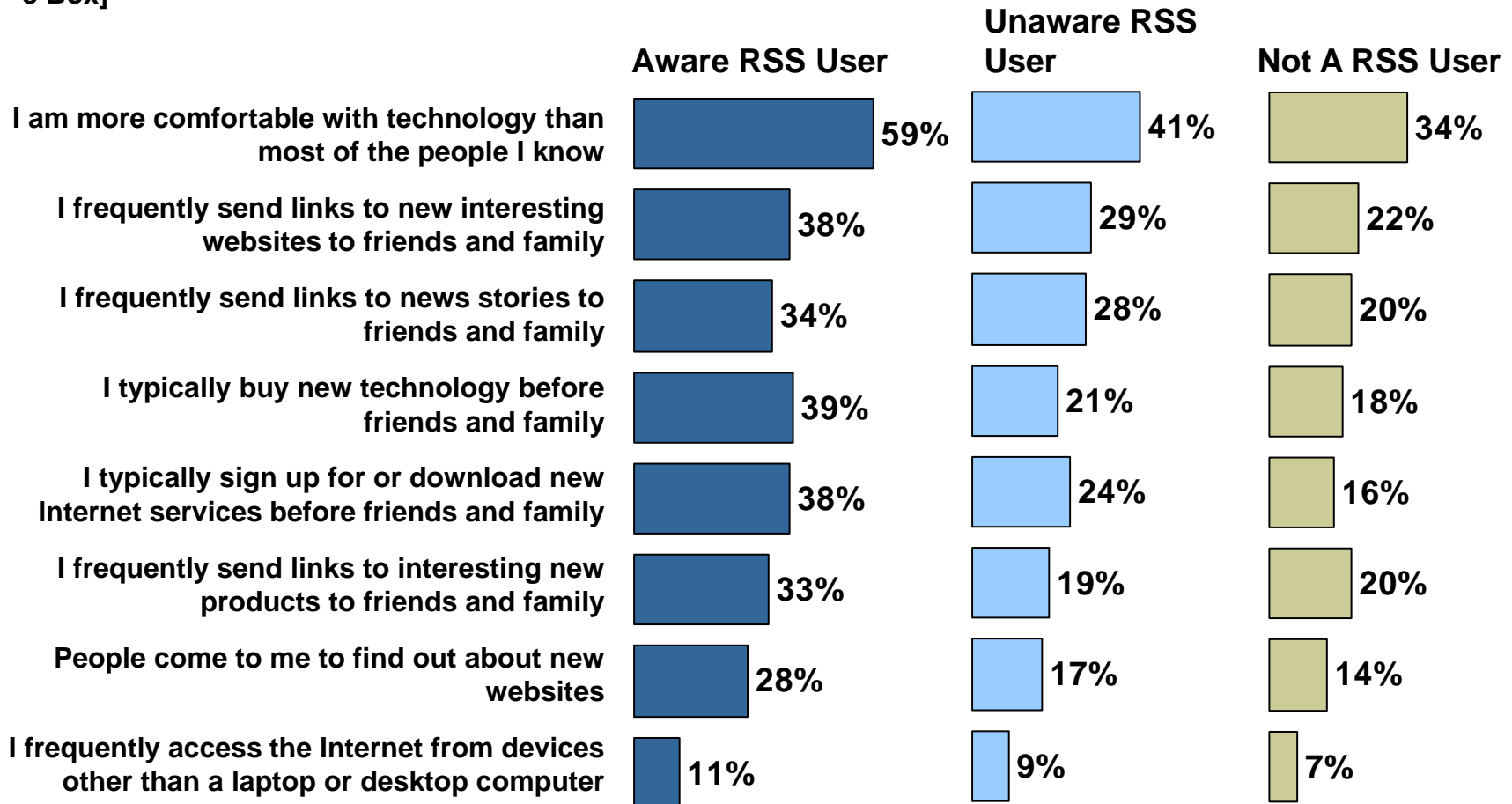
Unaware Users Frequently View RSS As Going to The Source Itself

Q: When you read news online, which of the following sources do you use to read a news story most often?
(please select one)



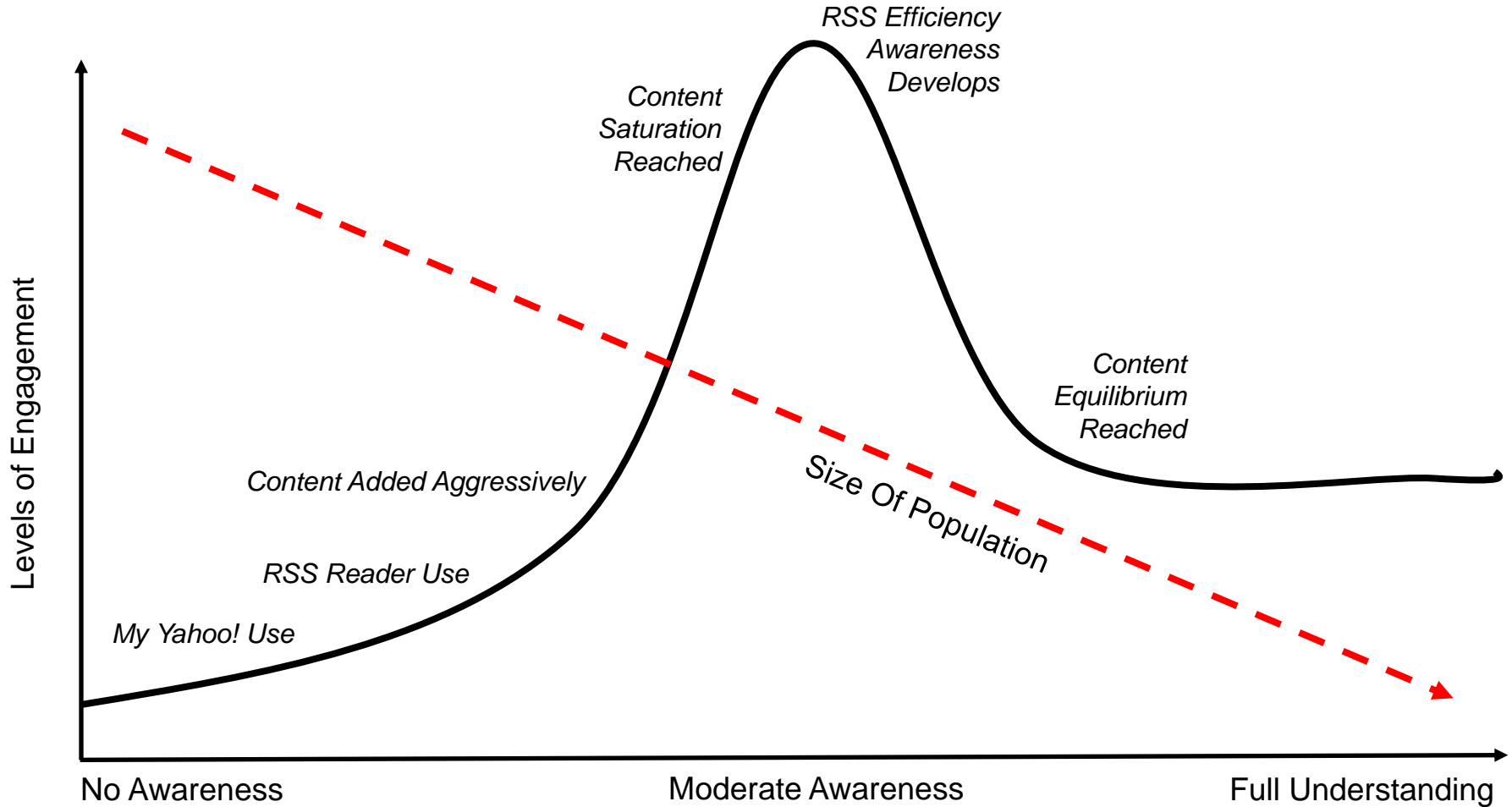
Even Those Who Are Unaware of Use Are Influencers

Q: To what degree do each of the following statements apply to you? Please rate each on a scale from 1 to 10 [Top 3 Box]





The Role Of Greater Awareness In The RSS User Experience





Take Aways...

- **Relationship**

- RSS undeniably changes the ways consumers interact with a media property. While some sites have seen great benefits from RSS functionality, others are clearly being hurt. Perhaps the greatest beneficiaries of RSS may be sites outside of the Top 20 properties, which should continue to see increased usage from RSS traffic.

- **The Future**

- Current evidence suggests that near-term effects may not last. As consumers become more comfortable with RSS they seem to be using it to streamline their online experience, rather than broadening it.

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Questions?

Michael Pond, Media Analyst
michael.pond@netratings.com