

Volume 3 · Number 8 · November 2004

digital edge report

Online Newspapers Drive Vehicle Buyers



Newspaper Association of America® 1921 Gallows Road, Suite 600
Vienna, VA 22182-3900
<http://www.naa.org>



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Online Newspapers Drive Vehicle Buyers

By Melinda Gipson

NAA, Director of Electronic Media

NAA Staff Acknowledgements:

Editor: Rob Runett

Layout: Katie Snyder

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For more information about this Digital Edge Report, contact:
ROB RUNETT, Director of Electronic Media Communications
Newspaper Association of America
1921 Gallows Road, Suite 600, Vienna, VA 22182-3900
703.902.1806 fax: 703.902.1745
email: rob.runett@naa.org
www.digitaledge.com



Chapter 1: Executive Summary

The Internet's impact as a research tool for car buyers is greater than ever. It is both a persistent influence and a displacement medium for the more traditional ways auto manufacturers and dealers use to reach buyers. CNW Marketing Research of Bandon, Ore., has taken an in-depth look at which media influence buyers at various stages in their purchase decisions, and which formats Internet users consider to be effective.

The Internet, formerly cited as the most important influence for around 8 percent of purchasers throughout the decision-making process, now breaks into double digits two months out and tops out at 12.3 percent of purchasers two weeks before a buy. Print newspapers peak at 18.4 percent two weeks in advance of a purchase. Together they could well combine to become a formidable force for marketers seeking to influence shoppers.

Assuming these formats are applied effectively, the marketer is still left to decide which channel or channels are most efficient in conveying his message to the consumer. In a separate study, the Newspaper Association of America tasked Dynamic Logic with sifting through some 1,000 online advertising campaigns to find those employing online newspapers, and then determine how the latter performed against brand metrics in contrast to the other leading sites in its MarketNorms® database.

Not surprisingly, the auto category was one in which online newspapers excelled, particularly in moving the needle on purchase intent.

Not surprisingly, the auto category was one in which online newspapers excelled, particularly in moving the needle on purchase intent. Dynamic Logic also offers valuable insights on what kinds of formats work best for high-consideration category campaigns.

But that still begs the question: how are online newspaper sites perceived by users in the market to buy a new or used vehicle? What is the user's mindset in employing them, and how does he or she differentiate among auto sites when seeking information he considers trustworthy? In fleshing out this picture of online influence and the auto buyer, NAA employed comScore/MediaMetrix' nationwide panel of Internet users to offer additional insight.



In an in-depth survey of 210 people who purchased a vehicle in the past year, online newspaper classifieds rank second, just behind "branded vehicle site," as the *one* information source that was the most influential in respondents' search for a new or used vehicle. The print version of the newspaper followed closely in third, trailed by consumer magazines and many leading auto Web sites such as AutoTrader.com, Autobytel.com and eBay motors.

Other conclusions:

The Internet is a leading media source for vehicle shoppers.

- Despite the plethora of vehicle auto sites available today, nearly one in five respondents that bought new cars and almost *one in three* used car buyers used newspaper online classifieds sites to assist them in buying a vehicle. This is an important distinction because 32 percent of auto shoppers visited two to three sites in the month prior to purchasing their vehicle, and another 28 percent of respondents said they viewed four to six sites.
- Half of new car buyers indicated that an Internet site other than an online newspaper classified site helped them make a decision about their purchase — 34 percent of used car buyers said the same. (*Note that cars.com in this case would have to be considered "other" than an online newspaper classifieds site.)


Offline sources also contribute to the decision making process.

- When asked what ONE source online car shoppers considered most influential in their purchase decision, they selected branded vehicle sites (12 percent) followed closely by newspaper online classifieds (10 percent). *Each* ranked higher than online sites like AutoTrader.com and KelleyBlueBook.com. When responses citing newspapers online and offline were combined on the "influence" question, the number jumps to 18 percent (19 percent including cars.com), higher than even "Branded Vehicle Sites" and second only to the unnamed "Other."
- The most popular offline source for new car buyers was the print version of a paper, while used car buyers preferred a weekly newspaper or shopper.
- Other key influences were dealers and friends & family.

Brands matter to online car shoppers.

- More than half (54 percent) of the respondents visited a branded vehicle site.
- KelleyBlueBook.com and Autotrader.com were visited by 49 percent and 35 percent of respondents respectively.
- While cars.com shows strong recognition among respondents, it would take a combination of cars.com and more generic online newspaper classifieds to reach 43.9 percent.

Of course, a picture paints a thousand datapoints, so we also offer case studies of how the auto buyer may be targeted online by his or her behavior with special offers and arresting creative messages. Combining print and online newspapers for promotions also has proven to be effective for some leading marketers, and we'll share their experiences on how they used the medium to best effect.



And, finally, we compare the audience research results of NAA's major online consumer users study, performed by MORI Research of Minneapolis, and those of CNW's purchase funnel. Not surprisingly, they agree that the online newspaper reader is an affluent, attractive marketing target.

Taken together, we hope these data might combine to forge a convincing case for marketers to consider:

- Combining print and online newspaper campaigns to add a multiplier factor that can exceed 100 percent.
- Tapping the creativity of rich media to deliver brand messages to online newspaper shoppers — not just on newspaper car sites, but away from the clutter of these typical placements, as facilitated by behavioral targeting. Relevance engenders results. And creativity can counter the turnoff the user might otherwise feel for more intrusive ad units.
- Using one of the newspaper industry's networks to accomplish one-order/one-bill buying, or search by Adconnections.org to fill in the gaps.

We delight in opening a dialog with marketers so that they will more proactively share their case studies with us using the "Share an Idea" form on the Adconnections.org Web site or perhaps by joining one of our conference panels. Our goal is to be a resource to bring buyers and sellers of online advertising together. NAA doesn't sell or place online advertising, but can tap the more than 850 online executives in the New Media Federation for help in brainstorming creative solutions. We welcome advertisers and online newspaper marketer participation in this process.



Chapter 2: The Purchase Funnel

The dialogue between auto manufacturers and dealers and the buying public has long been regarded as a "purchase funnel" by savvy marketers. In this object lesson, everyone who will ever find themselves in the market for a car goes into the wide top of the funnel and emerges from the very tip with keys to their a newly purchased vehicle in hand. Along the way, the conversation moves from being one about brand choices increasingly to one about features and benefits, and finally to price and availability.

The conventional wisdom has been that, because brand messaging correlates best with television ads, TV spending serves as the purchaser's introduction to his car quest. The majority of manufacturer spending tends to be invested at this wide end of the funnel, where the greatest number of potential buyers may be reached at a time when they are hopefully receptive to this message.

Yet, the Internet, with the help of rich media and behavioral targeting, is playing an increasingly ubiquitous role in even the brand decisions made by auto buyers.

The Temptation Timeline

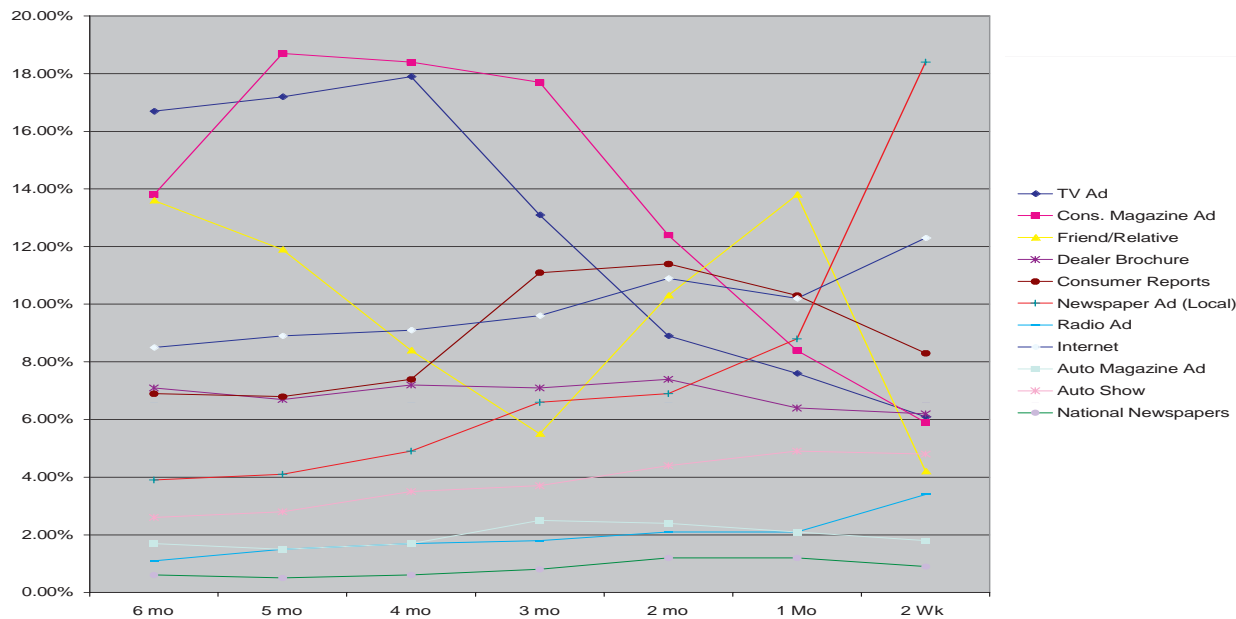
CNW Marketing Research of Bandon, Ore., has developed the most comprehensive consumer research to describe the roles various media play at progressive stages in auto purchase behavior. (See table and chart below; the source for both is CNW Research.)

Primary Source of Information in Vehicle Purchase Timeline

	6 mo	5 mo	4 mo	3 mo	2 mo	1 Mo	2 Wk
TV Ad	16.7%	17.2%	17.9%	13.1%	8.9%	7.6%	6.1%
Cons. Magazine Ad	13.8%	18.7%	18.4%	17.7%	12.4%	8.4%	5.9%
Friend/Relative	13.6%	11.9%	8.4%	5.5%	10.3%	13.8%	4.2%
Business Associate	11.7%	8.8%	6.5%	6.4%	5.7%	6.5%	8.2%
Dealer Brochure	7.1%	6.7%	7.2%	7.1%	7.4%	6.4%	6.2%
Consumer Reports	6.9%	6.8%	7.4%	11.1%	11.4%	10.3%	8.3%
Newspaper Ad/Local	3.9%	4.1%	4.9%	6.6%	6.9%	8.8%	18.4%
Auto Article (any)	4.1%	3.7%	4.2%	5.5%	4.9%	7.6%	7.9%
Radio Ad	1.1%	1.5%	1.7%	1.8%	2.1%	2.1%	3.4%
Internet	8.5%	8.9%	9.1%	9.6%	10.9%	10.2%	12.3%
Auto Magazine Ad	1.7%	1.5%	1.7%	2.5%	2.4%	2.1%	1.8%
Auto Buyers' Guide	4.9%	5.1%	5.8%	5.1%	6.2%	6.1%	7.3%
Store/Mall Display	0.2%	0.2%	0.4%	0.3%	0.2%	0.3%	0.2%
Auto Show	2.6%	2.8%	3.5%	3.7%	4.4%	4.9%	4.8%
National Newspapers	0.6%	0.5%	0.6%	0.8%	1.2%	1.2%	0.9%
Other	2.6%	1.6%	2.3%	3.2%	4.7%	3.7%	4.1%



Primary Source of Information Timeline



Source: CNW Research

In this grid, TV begins as the highest motivator of purchase intent, then plummets as the buying date nears, dovetailed closely by consumer magazine advertising, by about a month's lag time. Tracking the black line, the Internet begins as just the fifth most important influence in the vehicle purchase decision, but grows steadily to just the second, behind local newspapers as the purchase date nears. Not only is its consistency throughout the process impressive, it has grown recently to outstrip the dealer brochure. Judging from NAA's ComScore Internet panel research, it's likely that the manufacturer's brand site has displaced that brochure for the Internet savvy. The local print newspaper follows a similar arc at three months, then spikes dramatically one month out to become the leading source of information on price and availability — not to mention to browse for bargains.

While CNW doesn't differentiate among Internet sources for its analysis, we have to wonder: what if the online and printed newspaper were combined? It would be impossible without imposing further questions into the survey to determine which auto information sources the buyer might be viewing in his or her quest; as noted, our own investigation often puts the branded car site at the top of the information seeker's list. But it can also be asserted with confidence that online newspapers are typically the leading *local* site for user traffic. NAA is currently working on benchmarks for this percentage of penetration using comScore's LocalScore as a resource.

A separate comScore/Media Metrix survey of recent vehicle purchasers revealed that, among new and used vehicle respondents who had purchased a vehicle within the last 12 months, 64 percent indicated they visited a newspaper Web site in the last month and 29

percent said they had visited one in the last week (not counting cars.com, which is owned by newspaper consortium Classified Ventures and appears on many newspaper sites). Taken together, and depending on the timeline, it's reasonable to suggest that — where the vehicle shopper is concerned — a sizeable portion of Internet usage could be attributed to newspaper sites. We'll share more of the comScore results later in this white paper.

Internet Use Displaces Other Media

CNW doesn't stop there in its analysis of the Internet as influencer. Consumers who use the Internet as the primary source of data in making a vehicle purchase say the Net displaces other sources of information. The following table details this displacement by medium.

Percent By Which Internet Displaces Other Media

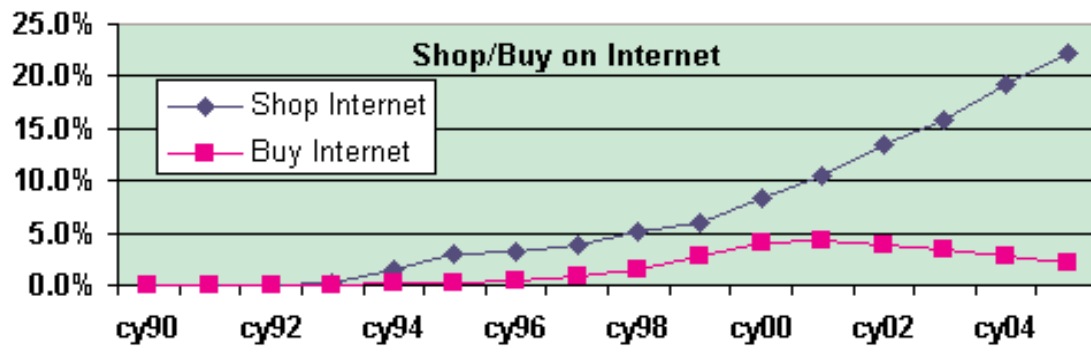
	cy1997	cy1998	cy1999	cy2000	cy2001	cy2002	cy2003
Dealer brochure	13.7%	16.6%	20.1%	21.3%	22.7%	23.4%	24.1%
Auto Buyers' Guide	18.8%	18.4%	16.4%	14.7%	13.6%	14.1%	16.3%
Newspaper Ad (local)	17.5%	16.2%	14.8%	15.2%	13.2%	10.8%	9.9%
Auto Magazine Adv.	9.2%	8.9%	8.7%	9.4%	9.9%	10.6%	10.2%
Auto Article (any source)	8.6%	9.1%	9.5%	9.6%	9.9%	10.4%	9.4%
Consumer Reports	8.8%	9.2%	9.4%	9.3%	9.2%	8.8%	8.7%
Radio Advertising	3.8%	4.2%	4.2%	4.6%	4.9%	5.6%	5.2%
Business Associate Recommendation	4.4%	4.9%	5.3%	5.1%	5.2%	5.4%	5.3%
Friend/Relative Recommendation	4.1%	4.2%	4.6%	4.3%	4.2%	4.4%	4.2%
TV Advertising	3.4%	2.9%	2.7%	2.6%	2.5%	2.1%	1.8%
Consumer Magazine Advertising	2.9%	2.3%	2.2%	1.9%	1.8%	1.6%	1.6%
Auto Shows	1.2%	1.1%	1.2%	1.1%	1.2%	1.3%	1.5%
Other	3.0%	1.4%	0.3%	0.6%	1.5%	1.3%	1.4%
Company Store/ Mall Display	0.6%	0.6%	0.6%	0.3%	0.2%	0.2%	0.4%
Computer (Internet)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: CNW Marketing Research Inc.

people who use the Internet a lot used dealer brochures 13.7 percent less in 1997, and this activity had displaced brochures by more than 24 percent in 2003. As already noted, the information the dealer or the auto maker puts into a brochure still are relevant to the car buyer, but the plugged-in buyer is just getting this information in a more conveniently searchable way. Newspaper usage, conversely, has declined less dramatically.

Internet use in shopping for a car clearly is on a dramatic upward trend, according to CNW, though the tendency to buy a car online appears to be diminishing.

Online Shopping and Buying Trends



Source: CNW Marketing Research Inc.

Chapter 3: Improving the Pitch

If the Internet is increasing as a means of influencing purchase decisions, clearly it's in the interest of vehicle marketers to know what's working. According to CNW, banner ads are holding their own, though sponsorships may spark more attention and direct e-mail is eliciting higher response. Sponsorships engender more trust from readers, while pop-ups are clearly more annoying.

Where Advertising Agencies Direct Client's Internet Funds

	Banner ads	Sponsorships	Email	Pop-up Windows	Sponsored Buttons
cy2003	48.6%	34.9%	16.3%	28.1%	5.6%
cy2002	55.2%	35.7%	17.1%	25.7%	7.2%
cy2001	61.3%	34.6%	19.2%	21.6%	10.4%
cy2000	77.2%	34.2%	18.6%	16.4%	9.1%
cy1999	83.4%	27.5%	17.1%	9.3%	7.7%
cy1998	91.6%	18.6%	16.8%	7.6%	5.2%

Internet Advertising Effectiveness

Percent of Shoppers Read / Notice...

	Banner ads	Sponsorships	Email (direct)	Pop-up Windows	Buttons (sponsored)
cy2003	10.3%	15.4%	5.9%	13.4%	7.7%
cy2002	10.7%	16.7%	5.2%	11.8%	8.1%
cy2001	12.9%	15.3%	6.1%	10.2%	8.3%
cy2000	18.4%	14.1%	8.2%	11.1%	8.8%
cy1999	24.9%	8.8%	11.4%	14.8%	7.4%
cy1998	36.1%	6.1%	16.9%	16.2%	7.2%

Percent who "click through" on...

	Banner ads	Sponsorships	Email (direct)	Pop-up Windows	Buttons (sponsored)
cy2003	0.16%	0.9%	1.8%	0.2%	1.6%
cy2002	0.2%	0.8%	2.1%	0.2%	1.7%
cy2001	0.4%	0.8%	3.4%	0.4%	1.6%
cy2000	0.4%	0.9%	4.6%	0.9%	1.7%
cy1999	0.6%	0.6%	7.2%	1.7%	1.3%
cy1998	1.8%	0.4%	9.1%	2.8%	1.1%



Shoppers "trust" content of the following a 10-point scale...

	Banner ads	Sponsorships	Email (direct)	Pop-up Windows
cy2003	2.7	7.7	5.6	6.2
cy2002	4.3	7.5	6.2	6.6
cy2001	5.0	7.8	6.5	7.1
cy2000	5.1	7.9	6.6	7.3
cy1999	5.7	7.6	6.4	7.4
cy1998	6.2	7.2	6.3	7.2
cy1997	7.2	7.2	6.5	
cy1996	7.7	7.1		
cy1995	8.1			

How annoying are each of the following (10 point scale with "10" being extremely annoying):

	Banner ads	Sponsorships	Email	Pop-up Windows	Sponsored Button
cy2003	5.2	4.5	9.3	9.6	4.1
cy2002	6.1	4.3	9.1	9.6	4.2
cy2001	6.6	4.4	9.1	9.5	4.8
cy2000	7.2	4.1	8.9	9.1	4.8
cy1999	7.7	4.2	7.6	8.8	4.6
cy1998	8.3	4.4	6.2	7.5	4.7

How annoying are each of the following types of banner ads (10-point scale)


	Static	Animated Character	Animated Text
cy2003	3.7	9.3	8.6
cy2002	5.2	9.4	8.8
cy2001	6.0	9.2	8.8
cy2000	6.2	9.1	8.7
cy1999	5.5	8.6	8.3
cy1998	4.9	8.2	7.6

Source: CNW Marketing Research

We'll spend more time in a later section on actual examples of ad campaigns and what their returns demonstrated about effectiveness.

The Dynamics of Brand Metrics

Savvy marketers know that the type of site that hosts an Internet campaign has a measurable impact on its effectiveness. But how much does this impact a moving target like branding?



Against this goal, NAA wondered, how well do online newspapers perform for their advertisers in contrast to other Web sites? Do they have any advantages that the industry can exploit? Do certain formats or practices do better than others?

In a study NAA released in Q1 2004 called "Exceeding Expectations," (the full study is available here: http://www.adconnections.org/Exceeding_Expectations.pdf) researchers revealed that, generally, newspaper campaigns perform "on par" with MarketNorms®. But online newspapers *excel* in impacting brands in the financial services and travel categories and in building persuasion in the automotive category, significantly outperforming MarketNorms® in these industries. Expectations were exceeded even more in retail, but from a comparatively much smaller sample size.

Newspapers excel at influencing brand categories that generally are more difficult to impact

The source for our data was Dynamic Logic, a third-party data source that has been collecting data in a standardized way on how online campaigns have impacted branding metrics on a large scale since 1999. In that time-frame, this New-York based marketing effectiveness research expert has compiled a MarketNorms™ database drawing on more than 1,000 measured campaigns, 10,000 creative executions and one million respondents. These campaigns have involved 47 of the top 50 U.S. advertisers, all 10 of the top 10 Web properties and 140 newspaper campaigns.

For the latter campaigns, which ran on 280 different newspaper sites, 73,940 online newspaper responses were compiled and compared with the average branding impact of Dynamic Logic's entire MarketNorms® database.

Researchers concluded:

- Newspapers excel at influencing brand categories that generally are more difficult to impact, which may in reality indicate that newspapers are even more effective on average.
- While some of these are traditional newspaper brands, others are not. This supports the effectiveness of newspapers for traditional advertisers and provides insights into potential newspaper online ad revenue growth.
- Demographics of newspaper site visitors among measured campaigns are highly desirable. Online newspaper respondents have very high income, are predominantly male and represent a more equitable cross-section of age ranges. This audience is difficult to replicate on other Web sites, gives an edge to online newspapers . Older males with a high income were particularly influenced through the use of





newspaper advertising, but online newspaper campaigns were effective with both men and women.

- Creative executions with interactive and/or rich media elements were particularly effective for campaigns that ran on newspaper sites, marking this as an effective strategy for advertisers. So-called "tower ads" (240x400) performed very well on these sites. One observation: more intrusive advertising may perform well on these engaging sites precisely because they are under-utilized. Sometimes scarcity translates to greater impact, so the tip here is not to wear out your welcome.
- While higher frequency was effective, it was not as effective as it might be. Taking advantage of greater sequential messaging rather than simple repetition offers excellent potential for greater effectiveness.

Of the campaigns Dynamic Logic had tracked through 2003, some 140 involved online newspapers, and those campaigns ran on a total of 280 newspaper sites.

Some 73,940 respondents — a control group of 34,060 and exposed group of 39,880 who responded to online pop-up surveys — had a chance to offer feedback on whether they were more or less likely to be aware of or be favorable to a given brand or be more likely to purchase a product with that brand name.

The following brand metrics were tested in each campaign, and the data rolled up into a compiled rating for newspapers as a whole.

- **Aided Brand Awareness** - Measures respondents' familiarity with **the brand advertised**
 - Question: *"Have you heard of the following brands of x?"*
- **Online Ad Awareness** - Measures whether respondents recall seeing **the brand advertised** online
 - Question: *"Have you seen any advertising online for the following brands of x in the past 30 days?"*
- **Message Association** - Measures the extent to which respondents can match a message(s) with **the brand advertised**
 - Question: *"Which of the following brands of x, if any, uses these messages in its advertising?"*
- **Brand Favorability** - Measures respondents' overall opinion of **the brand advertised**
 - Question: *"What is your overall opinion about each of the following brands of x?"*
- **Intent** - Measures respondents' likelihood to purchase/consider purchasing/visit or any other transactional metric regarding the brand advertised
 - Question: *"Next time you are looking to transact, how likely are you to transact with each of the following brands of x?"*



Note that none of the above questions were necessarily questions used in Dynamic Logic's measured campaigns. They're intended to assist observers as they distinguish among the desired impacts measured by brand marketers.

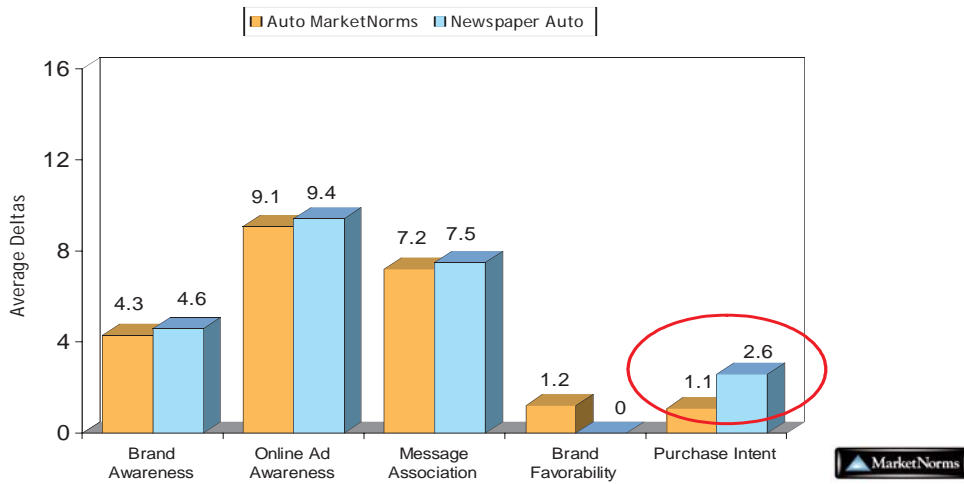
For the following chart on auto campaigns, point differentials between the MarketNorms® database and online newspaper performance are an indication of movement against a performance delta and don't transfer directly into percentages by which a brand metric was impacted by the viewing audience. Dynamic Logic's weighting scale is proprietary. Our confidence in comparing how online newspaper sites performed relative to their online peers derives from the fact, while different creative campaigns may have been employed for a variety of marketers on various types of sites, they nonetheless were measured against the same scale.

Online Newspaper Ads More Than Double Purchase Intent



Auto


- Typically it is difficult to increase Purchase Consideration for the automotive category, however Newspaper sites were effective in building persuasion to consider purchasing a new car



Source: Dynamic Logic MarketNorms Q2/03, Overall n=958,721

10

Any auto manufacturer might be satisfied with a 1.5-point differential in purchase intent from a campaign to which it exposed a television audience because that could translate into thousands more sales. Fewer people, however, would have seen the same campaign online. And yet, it's the effectiveness of online newspapers that has to be touted here. For an order



of magnitude fewer dollars, a savvy marketer targeting a national campaign to local online newspapers could reap more than double the impact on purchase intent of its exposed audience compared with other online venues.

Chapter 4: How Newspaper Web Sites Place in the Value Chain

NAA's survey of recent car buyers from comScore's Web user panel reveals that online newspaper classifieds rank second, just behind "branded vehicle site," as the one information source that was the most influential in respondents' search for a new or used vehicle. The print version of the newspaper followed closely in third, trailed by consumer magazines and many leading auto Web sites.

While this finding is good news, it also must be said that actual usage of other car sites may outstrip that of online newspaper classifieds. In answer to the question, "Which sites have you visited to research/shop for a new or used vehicle?," Newspaper Online Classifieds ranked sixth of 10 choices. But cars.com — predominantly an online newspaper classifieds site, with just five TV station sites numbered among its 177 affiliates — ranked fourth.


*Newspaper Sites Take a Strong Second in Battle to Influence Web-savvy Vehicle Buyers:
The combination of print and online newspapers can't be beat by any single source for auto shoppers.*

The combination of Newspaper Online Classifieds and cars.com would bump this amalgamated listing to third. Placing third among all sites visited is an important benchmark because 32 percent of Internet-savvy car shoppers say they visit "two to three" sites in the final 30 days preceding their vehicle purchase. An additional 28 percent of shoppers visit four to six sites. Only 13 percent of users visit just one site.

Certainly, it's good news, in any case, that cars.com has come so far in such a short time to establish itself as a brand that can be compared favorably with sites from AutoTrader and Kelly Blue Book. It's interesting that more people don't view this as a newspaper classifieds site, but then, there were even a couple of respondents who thought AutoTrader and KBB.com were also "Newspaper Online Classifieds."

Survey Background

As part of NAA's contract with comScore to compile traffic data on newspaper Web sites, we received permission to tap the company's panel of more than one million online users for a series of qualitative inquiries on subjects of our choosing. We began by exploring the media influences on online users, aged 18 to 65, who purchased a vehicle within the last 12 months.



We emphasize here the term "qualitative." We went "deep" with online users who had recently purchased a vehicle and could recall what Web sites or other media they may have used to make their purchase decisions. But the data are derived from 210 completed surveys and is so only intended to tell us what a cross-section of online users think about this process, not offer a comprehensive media usage dossier on all car buyers.

Using comScore's third-party panel rather than responses derived from online newspapers offers a representative sample of Internet behavior as a whole. Respondents use the Web but are not solely derived from a subset of people who use online newspaper Web sites. We did ask them if they used newspaper Web sites and if so, how. Because these respondents weren't recruited from online newspaper sites, we hope we derived their independent perspectives on how newspaper sites are viewed in the pantheon of digital information providers on the subject.

After comScore submitted its initial draft presentation, we noticed that cars.com, in some queries, had a clear distinction in respondents' minds from "Newspaper Online Classifieds," even though, as noted above, a majority of cars.com affiliates are newspaper Web sites. We then asked them, in the case where more than one answer was allowed, to de-duplicate the number of responses for the following questions:

- *Which site have you visited to research/shop for a new or used vehicle?*
- *When you were in the market for your vehicle, did you visit any of the following sites at least once a week?*
- *Thinking about the overall purchase decision, which of the following information sources was most influential?*
- *Which of the following sites, if any, prompted you to visit your local dealer?*
- *With which of the following sites would you be most likely to share personal information if it led to e-mail notification of vehicles that interest you?*

Cars.com fared better in some cases than newspaper classifieds online, but the reverse also was true. (A full slide presentation of these results accompanies this white paper.)

Respondents Agree on Growing Internet Influence

Here's a speed-read of the results from these active users of online media:

The Internet is a leading media source for vehicle shoppers.

- Nearly one in five respondents that bought new cars and almost one in three used car buyers used newspaper online classifieds sites to assist them in buying a vehicle.

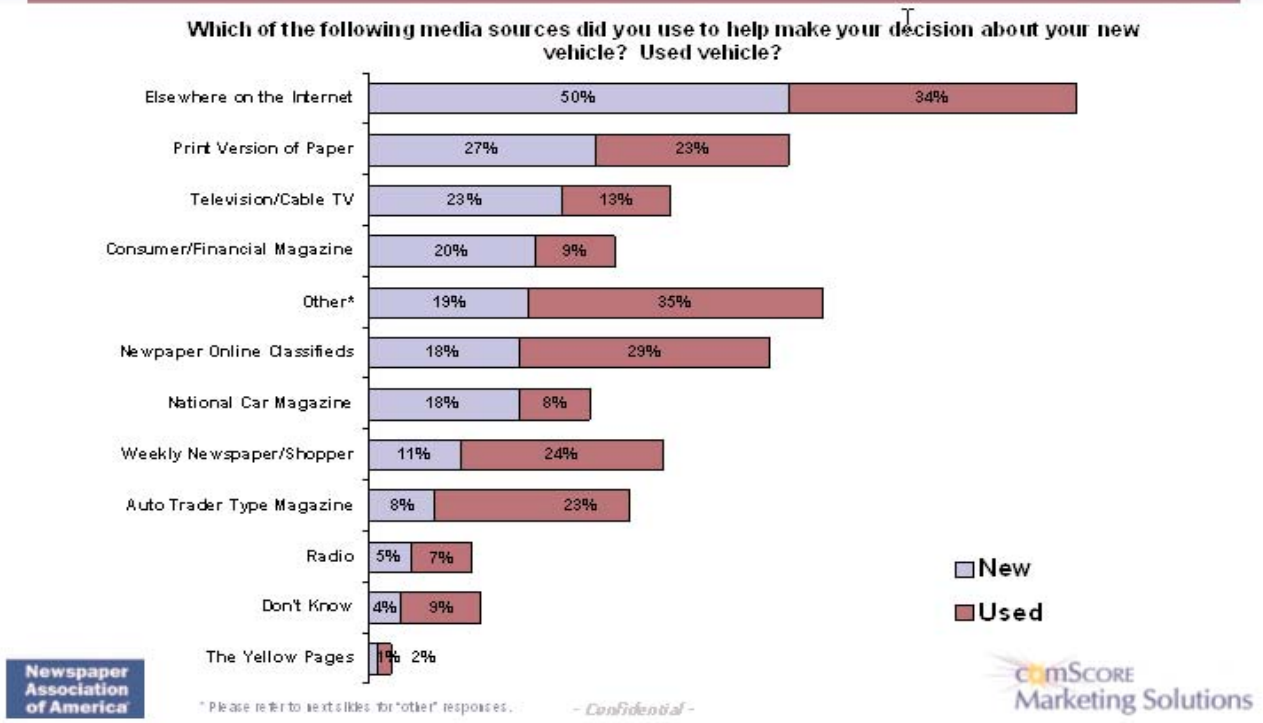
- Half of new car buyers indicated that an Internet site other than an online newspaper classified site helped them make a decision about their purchase — 34 percent of used car buyers said the same. (*Note that cars.com in this case would have to be considered "other" than an online newspaper classifieds site.)

Offline sources also contribute to the decision making process.

When asked what ONE source online car shoppers considered most influential in their purchase decision, they selected branded vehicle sites (12 percent) followed closely by newspaper online classifieds (10 percent). *Each* ranked higher than online sites like AutoTrader.com and KBB.com. When responses citing newspapers online and offline were combined on the "influence" question, the number jumps to 18 percent (19 percent including cars.com), higher than even "Branded Vehicle Sites" and second only to the unnamed "Other."

- The most popular offline source for new car buyers was the print version of a paper, while used car buyers preferred a weekly newspaper or shopper.
- Other key influences were dealers and friends & family.

Media Sources: New/Used Vehicle
 Nearly one third of used car buyer respondents cited that Newspaper online classified sites helped them make their purchase decision.



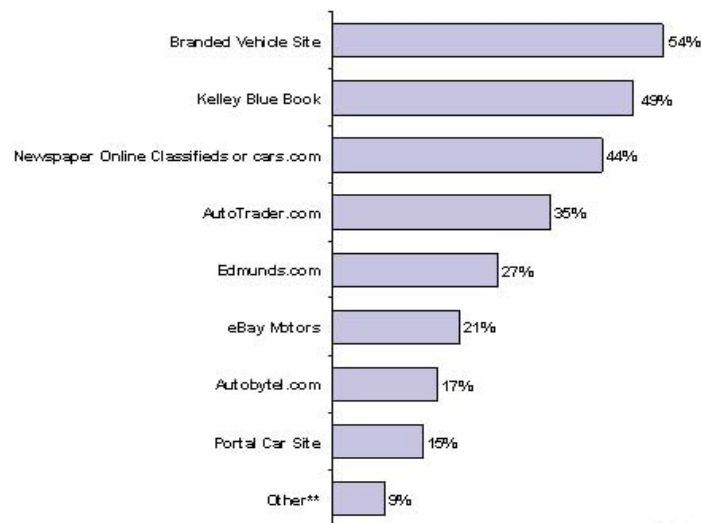


Brands matter to online car shoppers.

- More than half (54 percent) of the respondents visited a branded vehicle site.
- KelleyBlueBook.com and Autotrader.com were visited by 49 percent and 35 percent of respondents respectively.
- While cars.com shows strong recognition among respondents, it would take a combination of cars.com and more generic online newspaper classifieds to reach 43.9 percent.

Sites Visited: Research/Shopping
 Combined, unduplicated respondents from newspaper classifieds sites and cars.com are online car buyers' third most popular choice to research their auto purchase

Which sites have you visited to research/shop for a new or used vehicle?



* Please refer to text slide for Newspaper visit responses.
 ** Please refer to Appendix A for "other" responses.

- Confidential -



Newspapers sites draw frequent use.

- Nearly 40 percent of respondents visited an online newspaper classified site or cars.com at least once a week during the vehicle shopping process.
- Among new and used vehicle respondents, 64 percent indicated they had visited a newspaper Web site in the last month — 29 percent said they had visited one in the last week (not including cars.com).





Branded vehicle sites received the highest visitation levels and had the greatest frequency of visits by respondents.

- In addition, branded vehicle sites were selected as the most likely site to prompt respondents to visit their local dealer (34 percent of respondents).

Price is a critical research topic for shoppers.

- More than 80 percent of respondents looked for pricing information while conducting their vehicle search online.
- Comparing the features (62 percent) and the appearance (55 percent) of makes/models of vehicles were also significant topics researched online.
- Clearance prices were chosen by over half the respondents (52 percent) as an event that would prompt them to visit their dealer.

How do media sources stack up based on information categories?

- Among the topic categories, respondents were asked to choose the information source that was most helpful during the shopping process — newspaper online classifieds were deemed most helpful in the Vehicle Availability, Financing and Features categories.

New vs. Used Differences

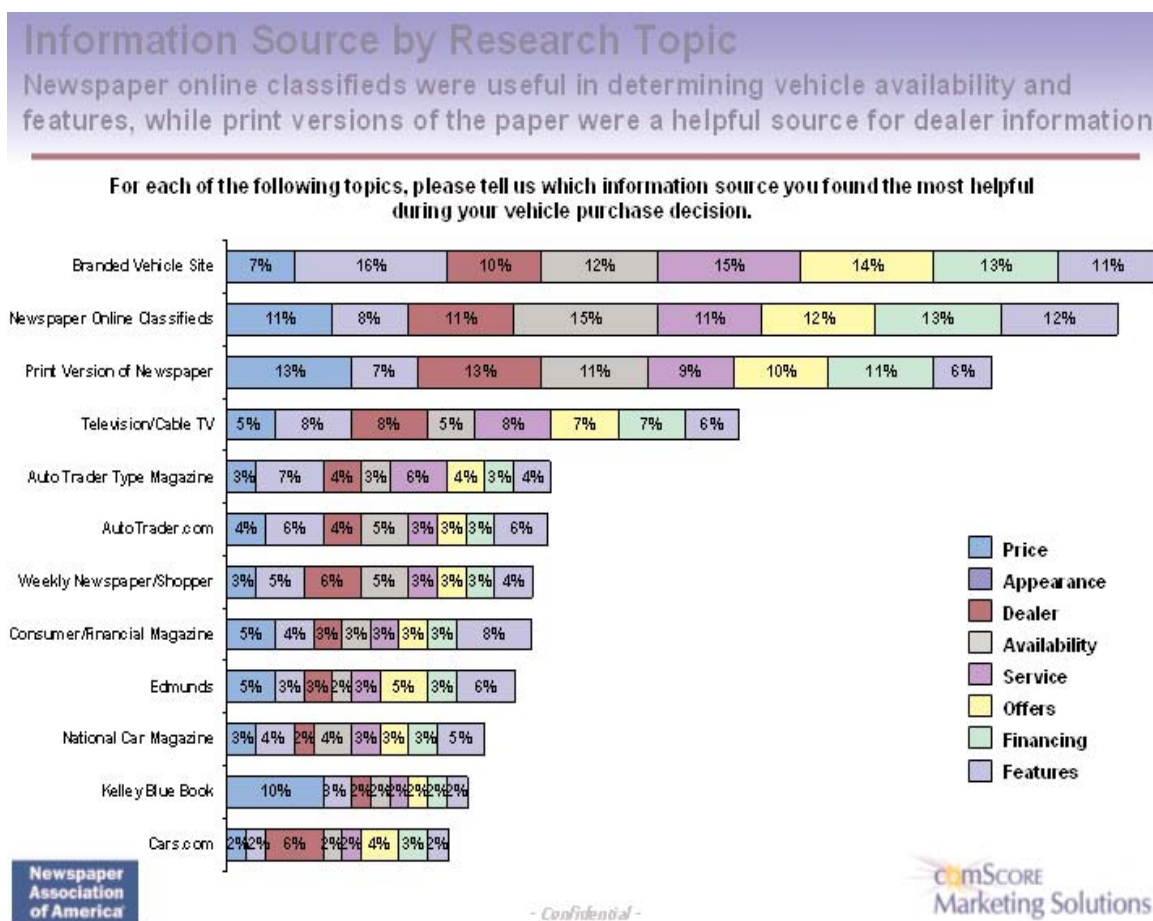
- Pricing was the most popular topic researched by both new and used car buyers. [Consider moving this bullet about pricing up to your "Price is a critical... section]
- New car buyers sought out information on dealers, comparisons of make/models, and offers & incentives more than used car buyers did.
- More used car buyers researched financing than new car buyers (26 percent vs. 19 percent).

Gender Differences


- Branded vehicle sites, cars.com and newspaper online classifieds attracted a larger female audience, while research intensive sites such as KBB and Edmunds attracted a primarily male audience.
- Females focused on the cost aspect in their online research, looking for information on pricing, financing and offers/incentives.

Other Take-Aways

It was our hope in constructing this survey to offer insights for vehicle site editors as well as useful information for advertisers. We were probably unsuccessful in the former pursuit, because online newspaper classifieds were judged to be better in nearly every category than their online peer group. (See below and associated PowerPoint.) The data don't offer us a clear indication of our shortcomings, in this case.



Because pricing was the most popular topic researched by both new and used car buyers at 83 percent of respondents, and because these same respondents judged the print version of the newspaper to be the number one source for pricing information (13 percent of respondents), followed by newspaper online classifieds (11 percent), this should be recognized as an essential element to vehicle online content.



Certainly, online newspapers may be able to do a better job of prompting car shoppers to contact their local dealers, but this may be a function of individual sites' business plans (i.e. not to refer buyers to a dealer unless the latter has paid for the positioning.) And there's probably something to be said for "branding" Newspaper Online Classifieds as a genre that is indispensable to savvy online information users.

But unquestionably there's much more to commend this study to advertisers. Following the NAA's participation in an "auto road show" in 2003, it became apparent that large interactive auto ad buyers were confronted with the conundrum that individual Web users were often "brand loyal" to one of many auto sites. For marketers, this means they have to spread their dollars thinly among four or five branded auto sites, just to meet their goals on reach.

Yet, if it's true that:

- At least 39 percent of Web-savvy auto buyers visit either a newspaper online classifieds site or cars.com at least once a week, and
- 64 percent of active buyers visited their online newspaper site at least once in the last month (49 percent at least within the last week)

Then, perhaps a convincing argument may be made that online newspapers have the attention of the best cross-section of buyers advertisers seek. Auto advertisers should advertise in the single most influential source for online auto shoppers and they need to do a better job appealing to those buyers on the basis of availability, financing and features in the vehicles that interest them the most.

Chapter 5: Case Studies

In anticipation of conducting an Innovator's Roundtable in Detroit in October, 2004, NAA compiled the following examples with the help of its members. Other online newspaper advertising case studies are available at: <http://www.adconnections.org/casestudies.cfm>.

• Tribune Co. Auto Show

The screenshot shows a web browser window displaying the Los Angeles Times website. At the top, there is a navigation bar with the 'latimes.com' logo and a search bar. Below the navigation bar, a large advertisement for the L.A. Auto Show is featured. The ad has a dark background with a car silhouette and text that reads: 'The only things that will move faster than the new GTO are the free tickets to see it.' It also includes the text 'GTO IS BACK' and 'LA AUTO SHOW'. Below the car silhouette, there are two smaller images of cars: a 2004 GMC Envoy SUV and a 2004 Buick Rainier. The ad lists the participating brands: PONTIAC, GMC, and BUICK. At the bottom of the ad, it says 'This offer is brought to you by your SOUTHERN CALIFORNIA BUICK • PONTIAC • GMC DEALERS'. To the right of the ad, there is a sidebar with various news snippets and a 'Business Section' promotion. The sidebar includes a 'Business Section' promotion with the text 'Popular Mint Strip Into Child's' and 'Vintage Tape to be the next bubblegum cigar or Pez'. Below this, there are several news snippets under the heading 'AP Business', including 'Stock Prices Close Mixed in Holiday Lull', 'Sales of Existing Homes Fell Last Month', and 'J.C. Penney Reports Strong Holiday Sales'. At the bottom of the sidebar, there is a small advertisement for 'We've done your homework!'.

Auto shows tour the country each year, introducing new carlines to buyers and car enthusiasts. An estimated 75 shows run for nine months (September to April). When the "Big 3" go online with a new product, they list all 75 shows on the new brand's Web site.

Tribune proposed a "conversion" strategy - to change Web surfers into shoppers. The idea was to increase interest in the new brand, increase awareness of the auto show tour and encourage visits to the local auto show. Auto show support focused mostly on traditional media. The approach was aimed to get General Motors interested in how "newspaper.com" advertising can enhance newspaper placements.

Strategy: Sunday newspaper ads take advantage of the medium's high reach within the marketplace, within a daypart. Sunday circulation for the Chicago Tribune in print is more than

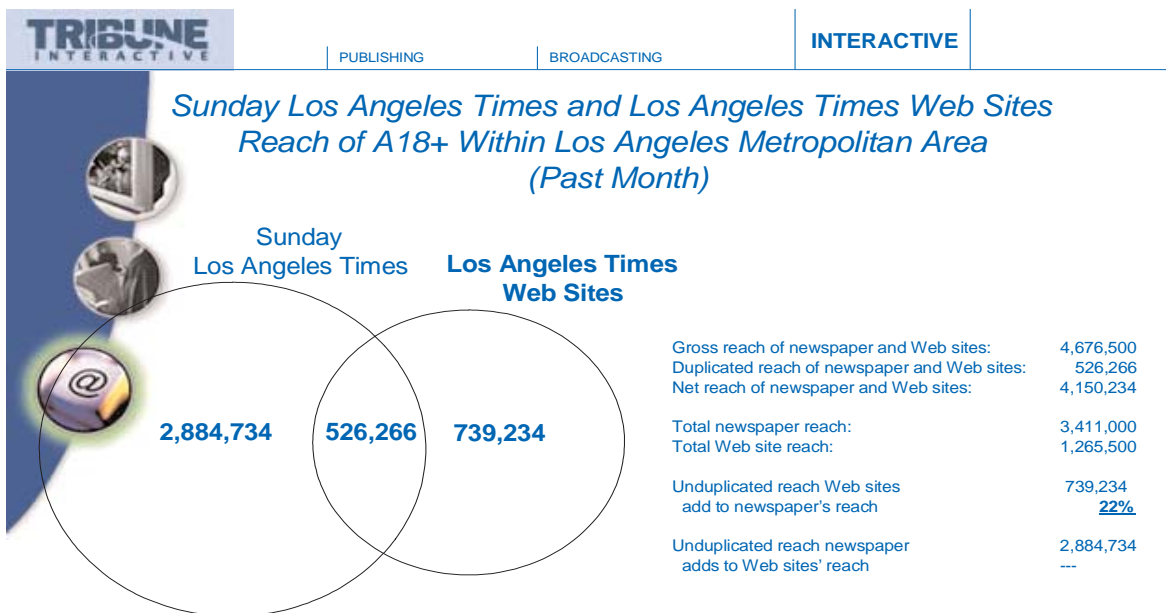


1 million (weekday circ. in the 600-650K range). The newspaper daypart typically equates to morning. But advertising within newspaper.coms take advantage of the Internet's high frequency within a very different daypart, reaching the "at work" internet user. Tribune Interactive and Classified's (TI) online newspaper audience is 85 percent Mon. — Fri. Seventy percent of this weekly audience is online from 6a.m. to 6 p.m. (Source: Sage).

Online advertising within "newspaper.coms" is very effective in building awareness and offers increased reach to non-newspaper readers. For those who do read both, the ads offered increased frequency — reaching newspaper readers twice, one time in the newspaper, one time online. Online advertising extends the "shelf life" of newspaper offers within newspaper.com - a natural fit.

Assertion: Flighting online advertising with offline will increase efficiency, both working together to achieve the same objective.

Proof:



Approach:

- Dealer Group participation - Auto show tickets were distributed to participating dealers.
- Tribune allocated online impressions and newspaper ads to "free ticket" giveaway.
- Users fill out online registration form, which included new car buying questions, i.e. "May we provide your information to a Dealer for Follow Up?"
- Users then took printed "ticket code" to local dealership to pick up free tickets.

Benefits to Buick/GMC/Pontiac:

- Dealers start building relationships before the start of the show
- Generate showroom traffic
- Gather qualified leads
- Providing VALUE to the consumer ("breaking the ice" - a \$20 savings)

Results:

- "Industry Average" click-through rates, but
- Very high conversions — Total completed applications
- Very high conversions — Completed applications to "hand raisers"
- When Online/Newspaper ads were scheduled on the same day, applications spiked by +120 percent

• **RealCities and Isuzu**

Search for [More](#)

THE TAMPA TRIBUNE
LIFE. PRINTED DAILY.
Powered by TBO.com

[TBO.COM](#) [WFLA](#) [The Tampa Tribune](#) [Community](#)

RODEO
SAVE UP TO **\$6,500**

ASCENDER
SAVE UP TO **\$5,000**

AXIOM
SAVE UP TO **\$5,000**

ISUZU
SPEND LESS
GO FARTHER
[click for details](#)

Isuzu's "Spend Less, Go Farther" Campaign

Objective: Isuzu's goal with this campaign was to increase awareness, consideration to purchase an Isuzu and intent to visit a showroom. Isuzu's target audience was adults 25 to 54 who are in the market to purchase a car. The campaign ran for 3 months across 10 Real Cities sites: [suntimes.com](#) (Chicago, IL), [star-telegram.com](#) (Dallas/Ft. Worth, Texas), [kansascity.com](#) (Kansas City, MO), [commercialappeal.com](#) (Memphis, TN), [herald.com](#) (Miami, FL), [startribune.com](#) (Minneapolis-St. Paul), [azcentral.com](#) (Phoenix, AZ), [newsobserver.com](#) (Raleigh, NC), [sacbee.com](#) (Sacramento, CA) and [tbo.com](#) (Tampa Bay, FL). These markets were selected as extensions to Isuzu's in-market TV and radio buys.

Results: 40 million impressions ran behind this campaign and the average click-through rate was .8%. The campaign ran within auto and run-of-site. The banner sizes used were 728x90, 160x600, 120x600 and 120x240.

A Dynamic Logic study was conducted as part of this campaign to evaluate the effectiveness of the online advertising in accomplishing Isuzu's objectives outlined above. Key findings of the study are as follows:

- Brand favorability (measures respondents' opinion of Isuzu) increased across the board, but most significantly among the target audience, which showed a 26% increase. These results indicate that the audience can be persuaded to put Isuzu on their short list of vehicles under consideration.
- When asked about brand attributes associated with Isuzu, the brand experienced a 10% increase among respondents who said they perceive the brand as providing "great value." Among the target audience (adults 25-54), this metric increased by 27%.
- Brand awareness after exposure to the advertising increased by 60%
- SUV purchase intent among males increased 42%

Why Real Cities? The benefit to Isuzu of working with the Real Cities Network included:

- Access to more than 100 newspaper sites via one contact.
- Access to web sites with strong local audience demographics
- Access to sites that truly deliver authentic and locally produced content
- Access to trusted local brands

• **Belo Interactive's DallasNews.com and Mitsubishi**

Objective:

DallasNews.com's goal was to drive online and offline results for a Mitsubishi Auto Dealer. Specifically, the campaign sought to increase awareness of the dealership and its inventory among consumers who were local, ready to buy, and willing to act now.





Background:

Belo Interactive had built a robust registration system and a deep profile database of more than a million registrants. In 2003, BI added Tacoda's Audience Management System in order to target behavioral as well as characteristic data, giving the publisher's sites a significant competitive edge in all of its markets. To generate store traffic and test drives, a regional auto dealer offered incentives to consumers who were local, ready to buy, and willing to act now. The advertiser would look for calls, faxes and other offline success indicators, in addition to clicks and inventory searches. The advertiser also chose to run the same promotion with other local media to determine which performed best.

Method:

- Used contextual advertising within the automotive section of DallasNews.com to deliver targeted banners to consumers.
- The same ads were served when visitors returned to DallasNews.com even if they were outside the automotive area.
- By using Tacoda Systems' Audience Management System targeting capabilities to reach visitors whose prior actions suggested a keen interest in the advertiser's message, DallasNews.com increased customer response. Technology enables "behavioral" tracking on DallasNews.com.
- Auto shoppers were identified according to their use of automotive classifieds.
- Technology integrates registration data to enable demographic and/or interest category targeting.

Results:

- Target audience of in-market auto shoppers responded at a 7.7 percent rate compared with the national average of .33 percent, representing an improvement of 2,200 percent.
- The number of credit applications doubled while the campaign was running
- Searches for Mitsubishi automobiles increased by 17 percent on DallasNews.com (indicator of branding impact).
- Campaign generated 44 percent of the total calls into the dealership at a time when eight promotions were running in other media.
- DallasNews.com won NAA's 2004 Digital Edge Award for online advertising campaign in a large-market newspaper.

Lessons:

- Registration + behavior make for a powerful one-two punch.
- DallasNews.com's ability to target differentiates a Web site from its competitors in a meaningful way creates success for advertisers while providing more relevant service to registered visitors.
- Advertisers are eager to learn more about new ways to boost effectiveness and efficiency. Sharing success stories helps open the door towards securing and facilitating more sub-

stantive meetings, which then lead to sales.

- Targeting works.

Why Online Newspapers?

- Consumers respect and trust their local news source, and so they register and volunteer significant data about themselves that is of tremendous and immediate value to advertisers. More than 5 million registered users have provided Belo with such details as their age, gender and income; a range of interests and hobbies from automotive, cooking and entertainment to stocks, sports and travel; as well as their media preferences.
- Visitors to local news sites identify with the characteristics of "High Affinity" audiences, and so they have a "positive disposition toward advertising."
- The Online Publishers Association conducted research with comScore and MillwardBrown in 2003 demonstrating that "affinity is a key driver of brand metrics."

This can also work for local dealers. Using a "MySpecialsDirect" e-mail campaign generated by DallasNews.com's user registration engine, one local deal reaped 853 percent in ROI: 15 vehicles were sold as a direct result of the MySpecialsDirect.

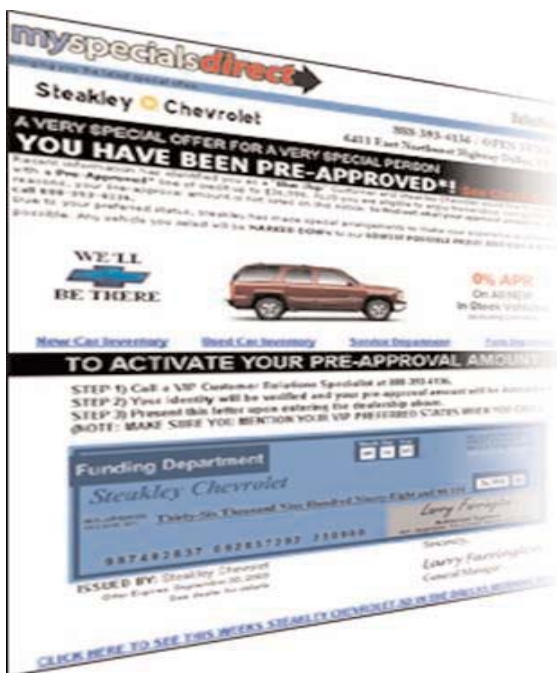
MySpecialsDirect Reach Campaign

Phase 1 Results

- 25,199 e-mails delivered
- 26.5 percent open rate and 7.5 percent effective click rate
- 22 phone calls to the dealership within 2 hours after the first e-mail was sent!

Phase 2 Results

- 6,676 e-mails delivered
- 80.5 percent open rate and 5.0 percent effective click rate
- 75 percent of phone calls to the dealership resulted in an appointment!
- 50 percent of the appointments purchased a vehicle!



- **Cars.com and Mercedes**

Mercedes wanted to generate leads for its local dealers year-round. For its 2004 campaign, the automaker ran Mercedes Benz Regional Splash pages — for example, linked to the TriState Mercedes Dealer Association. The banners were run on results pages for buyers who were looking for Mercedes, both new and used, but were geo-targeted by ZIP code to provide leads lower in the "funnel" of intentioned buyers — buyers with a very high intention level, and an equally high interest in Mercedes. This traffic generated leads that were delivered directly into the dealer showroom.

Goal:

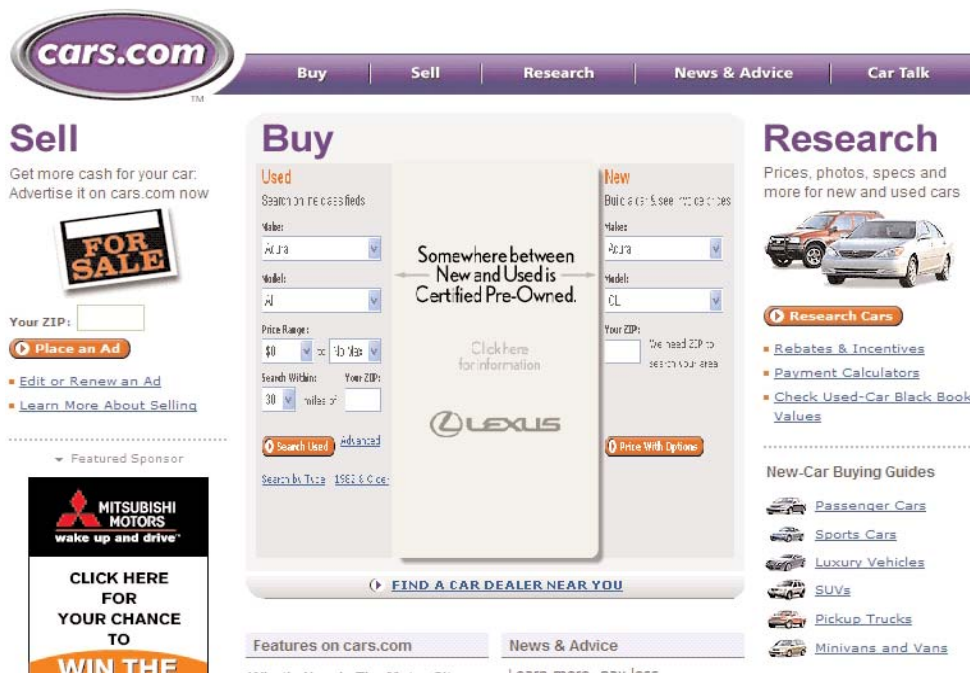
To provide leads to dealers for less than \$100 per lead. The campaign currently is indexing below \$30/lead.

Year	Vehicle	Price ↓	Mileage	Photo	Seller	Body	Color	Distance	Save
2000	BMW 323 I	\$30,995	48,565		Southland Auto Exchange	Convrt	Silver	8 mi.	<input type="checkbox"/>
2000	BMW 323 I	\$29,900	53,803	<input type="checkbox"/>	Dream Motorcars	Convrt	Gold	6 mi.	<input type="checkbox"/>
2000	BMW 323 Ci	\$28,995	48,927	<input type="checkbox"/>	South Bay BMW	Coupe	Black	16 mi.	<input type="checkbox"/>
2000	BMW 323	\$27,900	15,849	<input type="checkbox"/>	PK Bimmerz	Sedan	Orient Blue	13 mi.	<input type="checkbox"/>
2000	BMW 323	\$27,500	20,000	<input type="checkbox"/>	PK Bimmerz	Coupe	Black	13 mi.	<input type="checkbox"/>
2000	BMW 323 I	\$26,995	49,026		South Bay BMW	Sedan	Blue	16 mi.	<input type="checkbox"/>
2000	BMW 323 I	\$26,950	64,325	<input type="checkbox"/>	Ferrari and Maserati of Orange County	Convrt	Silver	41 mi.	<input type="checkbox"/>
2000	BMW 323 Ci	\$26,900	33,349	<input type="checkbox"/>	PK Bimmerz		Blue	13 mi.	<input type="checkbox"/>
2000	BMW 323	\$26,500	41,020	<input type="checkbox"/>	PK Bimmerz	Coupe	Titanium Silver	13 mi.	<input type="checkbox"/>
2000	BMW 323 Ci	\$26,490	34,882	<input type="checkbox"/>	Ruznak BMW (Westlake)	Coupe	Jet Black	24 mi.	<input type="checkbox"/>
2000	BMW 323 I	\$25,995	47,660	<input type="checkbox"/>	New Century BMW	Sedan	Gold	15 mi.	<input type="checkbox"/>
2000	BMW 323	\$25,900	29,345	<input type="checkbox"/>	PK Bimmerz	Sedan	Blue	13 mi.	<input type="checkbox"/>
2000	BMW 323	\$24,999	47,342	<input type="checkbox"/>	PK Bimmerz	Coupe	Titanium Silver	13 mi.	<input type="checkbox"/>
2000	BMW 323	\$24,999	34,415	<input type="checkbox"/>	PK Bimmerz	Sedan	Orient Blue	13 mi.	<input type="checkbox"/>
1998	BMW 323 iC	\$24,995	46,074	<input type="checkbox"/>	South Bay BMW	Convrt	Blue	16 mi.	<input type="checkbox"/>
2000	BMW 323 Ci	\$24,995	45,338		Bob Smith BMW	Coupe	Blue / Gray	14 mi.	<input type="checkbox"/>
2000	BMW 323	\$24,900	44,260	<input type="checkbox"/>	PK Bimmerz	Coupe	Kashmere	13 mi.	<input type="checkbox"/>

- **Cars.com and TeamOne**

Cars.com, in addition to providing great "point of search" contextual results, also has infused a high degree of rich media creativity with the help of its more adventurous advertisers. TeamOne, for example, wanted to position Lexus' Certified Pre-Owned cars as a third category of auto purchase (not "new," not "used," but something entirely different and an exciting new alternative.)

It did so with an arresting, rich-media Eyeblaster campaign that appeared to squeeze into cars.com's typical start page.



The original intent of the campaign wasn't to cause click-throughs, but it did so, dramatically, delivering one of the highest click-through rates for the year. Compared with the standard homepage banner ad, this Eyeblaster generated 1,863 percent more click-throughs.

Chapter 6: Conclusion

As noted in our comScore survey, online newspapers don't capture the majority of Internet car buyers. But a final bit of research does reflect the fact that online newspaper users are a highly desirable audience sector for vehicle marketers.

As part of a consumer research project conducted for the Newspaper Association of America, MORI Research of Minneapolis called 2,000 general Internet users on the phone — people who'd used the Net within the last month — and offered pop-up surveys to online newspaper users. More than 23,000 online newspaper readers completed the survey and they emerge as a very attractive audience.



Newspaper site visitors are a choice target because they're:

- Younger. More of them fall into the coveted 18-34 demographic (44 percent compared with 26 percent for the general Web)
- Better educated and more likely to be employed (54 percent have college degrees and 88 percent are working)
- Affluent. They have a mean income of \$70,000
- More diverse ethnically than the 'Net generally.
- Three times as likely as general 'Net users to be online during the workday when out of reach of other media; 8-11 a.m. is their new "primetime" for media consumption
- Twice as likely to have broadband access at work and 42 percent more likely to have it at home than general 'Net users, one reason they are online 19 hours a week vs. 11 hours for the general Internet population
- Checking check news daily (63 percent), meaning you can reach a wide audience rapidly.
- Frequently banking online (58 percent) — one reflection of their trust of and emersion into the medium.

There's more detail on this demographic in our seprate "Power User's Study" here: <http://www.adconnections.org/poweruser.html>.

CNW puts online-only newspaper readers' household income higher at \$92,941, but also notes that the desirability of a cross-platform newspaper reading audience to vehicle marketers may be even greater than that of the online audience alone.

Cross-Media Readership

Of Online Newspaper Readers

	Read Online (Online)	Read 1 Nat and 1 Local		Read Multiple Nat	Read Multiple Local/ Any Paper Edition
National	21.4%	78.6%	100.0%	56.8%	64.1%
Local Daily	56.8%	43.2%	100.0%	47.2%	46.8%
Local Weekly	11.3%	88.7%	100.0%	42.8%	60.7%



Automotive Related Stats by Readership Pattern

	Read Only (Online)	Read 1 Nat and 1 Local	Read Multiple Nat	Read Multiple Local	Also Read Any Paper Edition
New Vehicle Past 3 Years	28.7%	34.6%	41.2%	38.6%	48.6%
Number of Vehicles in HH	2.6	2.9	3.3	2.5	3.2
Average Price New Vehicle	\$23,694	\$31,486	\$36,882	\$36,197	\$41,566
Plan to Purchase w/I 2 Yrs	34.1%	37.8%	46.3%	39.9%	53.6%
Anticipated Budget	\$29,744	\$36,471	\$40,121	\$38,648	\$50,962
Brand Loyalty	41.2%	43.8%	52.9%	51.1%	56.3%
Dealer Loyalty	21.6%	28.9%	31.4%	27.7%	29.3%
HHI	\$92,941	\$103,165	\$187,693	\$185,446	\$231,792

Of Paper Edition Readers

	Read Online (Online)	Read 1 Nat and 1 Local	Read Multiple Nat	Read Multiple Local/ Any Paper Edition
National	76.7%	23.3%	100.0%	14.9%
Local Daily	82.4%	17.6%	100.0%	11.1%
Local Weekly	57.3%	42.7%	100.0%	9.6%



Automotive Related Stats by Readership Pattern

	Read Only (Online)	Read 1 Nat and 1 Local	Read Multiple Nat	Read Multiple Local
New Vehicle Past 3 Years	22.6%	28.1%	35.6%	27.7%
Number of Vehicles in HH	2.4	2.6	3.1	2.4
Average Price New Vehicle	\$23,506	\$31,552	\$35,731	\$36,154
Plan to Purchase w/I 2 Yrs	27.1%	28.6%	34.7%	26.2%
Anticipated Budget	\$29,451	\$34,116	\$38,943	\$36,104
Brand Loyalty	38.7%	39.5%	47.4%	48.1%
Dealer Loyalty	18.7%	25.4%	31.1%	24.8%
HHI	\$88,162	\$89,731	\$152,674	\$157,381


Source: CNW Marketing Research

As noted in our initial examination of recent CNW purchase funnel research, the challenge to vehicle marketers always remains to reach the prospective vehicle buyer at just the *right* time to make an impression that will influence his or her purchase.

Easier said than done. But it would appear that, given an understanding of what online newspaper buyers are looking for while shopping for a vehicle, combined with their continuing interest in the printed newspaper, new and exciting possibilities present themselves.

Consider:

- Combining print and online newspaper campaigns to add a multiplier factor that can exceed 100 percent.
- Tapping the creativity of rich media to deliver brand messages to online newspaper shoppers — not just on newspaper car sites, but away from the clutter of these typical placements, as facilitated by behavioral targeting. Relevance engenders results. And creativity can counter the turnoff the user might otherwise feel for more intrusive ad units.
- Using one of the newspaper industry's networks to accomplish one-order/one-bill buying, or search by Adconnections.org to fill in the gaps.



We also hope to open a dialog with marketers so that they will more proactively share their case studies with us using the "Share an Idea" form on the Adconnections.org Web site or joining our conference panels. And, we hope to be a resource to bring buyers and sellers of online advertising together. NAA doesn't sell or place online advertising, but can tap the more than 850 online executives in the New Media Federation for help in brainstorming creative solutions.

Contact:

Melinda Gipson
Electronic Media Director
Newspaper Assn. of America
703-902-1769
gipsm@naa.org