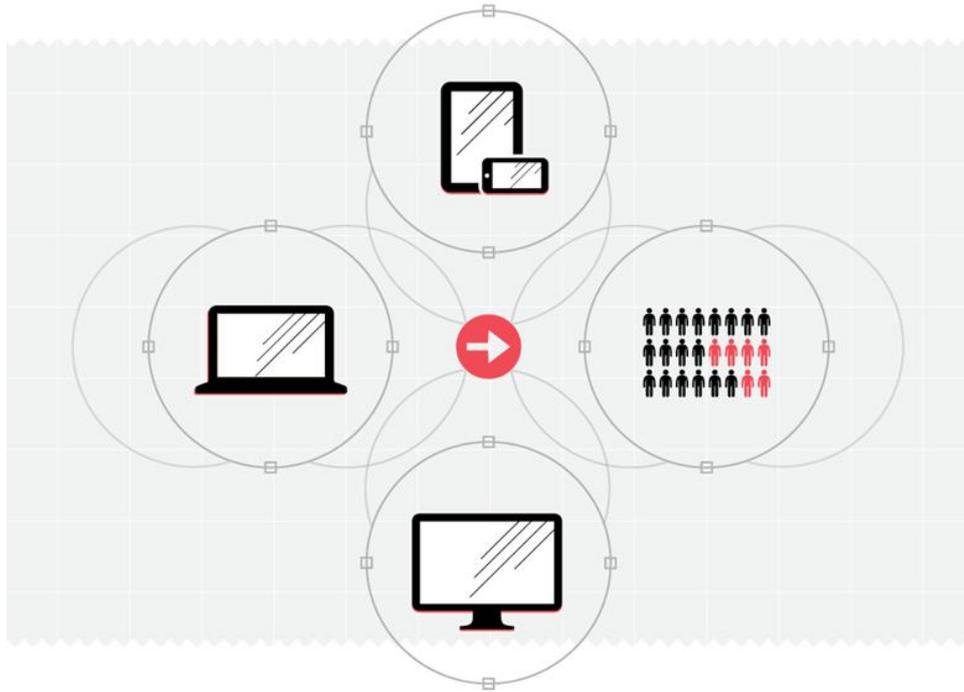


# The Value of Trust



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## BACKGROUND

The Association of Online Publisher's (AOP) 'New Rules of Engagement' study in 2010 identified and established the dimensions of site engagement that had the strongest relationship with consumers' behaviour towards the advertising they are exposed to. The dominant dimension was determined to be trust, and original content sites were seen to perform well ahead of the other two categories, portals and social networking sites, on this dimension. The objective from this baseline of understanding was to understand more about the level of value of this increased consumer trust provides for the advertiser, so comScore were commissioned to conduct 'The Value of Trust' as a follow-on study.

## SUMMARY OF FINDINGS

The key findings from this project can be summarised as:

- There is a proven 'trust multiplier effect' from online display advertising, driving traffic to brands' sites and leading to increased searches for advertisers' brands.
- Higher levels of trust in original content sites equates to a higher degree of affinity and trust in the advertisers who appear in those environments.
- Advertising on original content sites is measurably more effective versus other online media in delivering on all levels of the purchase cycle from awareness to purchase.
- Users exposed to ads on original content sites are the most likely to visit the advertiser site and/or search for the advertiser brand compared to those users exposed in either portal or social network environments.

## DESCRIPTION OF METHODOLOGY AND DATA SOURCES USED

comScore evaluated seven online display advertising campaigns running in the UK during September 2011 from a variety of industry sectors including automotive, fashion retail, financial services, luxury goods and groceries. The evaluation centred on two streams of activity:

1. Behavioural measurement: understanding whether digital ad exposure altered online behaviour
2. Attitudinal measurement: understanding whether digital ad exposure shifted consumers' mindsets

The focus of the research was to understand the extent to which the publisher environment in which the ad units were seen impacted consumer behaviour or caused attitudinal change. The publisher environments were defined as follows:

- Original content sites
- Portal sites
- Social networking sites

## Behavioural Measurement: Action Lift Research Design

comScore automatically captures all types of online behaviour across its panel of over 65,000 UK Internet users, including exposure to various types of online advertising. In order to maximise accurate identification of a specific campaign that is being tracked as part of an Action Lift study, campaign traffickers are provided with a comScore tag which is appended to the display ad. This allows comScore to systematically and accurately identify consumers who are exposed to the ad. The tag also includes parameters for segmentation purposes, such as an identification of the site that published the ads and the type of creative message used.

As noted above, comScore has a panel of online consumers who allow comScore to monitor their complete Internet browsing behaviour and view this behaviour in a real market setting rather than using an artificial research design. In this Internet traffic data, comScore can “see” the tagged ads and identify consumers who were exposed to the campaign. This observation, linked to panel behaviours, forms the basis for all behavioural analyses

**Test group:** Based on passively observed exposure to an ad, comScore creates a test group of panelists exposed to the campaign.

**Control group:** comScore then creates a control group of panelists not exposed to the campaign but which exhibit the following characteristics when compared to the test group:

- Similar usage of the Internet overall
- Similar visitation to the sites where the ads were in rotation
- Similar total search behaviour online
- Similar distribution on the following household demos: age, gender & income

With the exception of the exposure to the online display ad test campaign, the test and control groups are virtually identical, including their opportunity to be exposed to other forms of media, allowing comScore to isolate the effects of the specific advertising campaign being evaluated. Passively collected behavioural data captures the view-through value of the overall campaign by measuring consumers' Internet activity across key behavioural metrics. This behaviour is measured irrespective of whether an ad is clicked on or not.

## User Survey

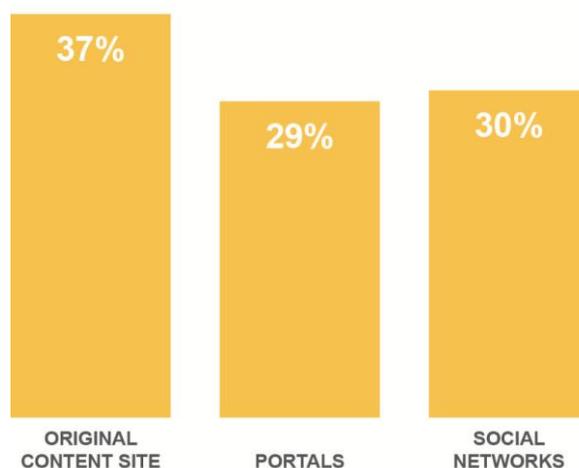
In addition to understanding the impact on consumer behaviour, a substantial focus of the research was directed at understanding any attitudinal changes resulting from digital ad exposure. To this end, a survey of over 2,000 online consumers, demographically balanced against the overall UK Internet population as defined by the National Readership Survey (NRS), was conducted. The survey focused on the key brand measures that form the bedrock of traditional media effectiveness research:

The questionnaire introduced 'forced-exposure' to one of the seven campaigns, whereby respondents see specific creatives from the campaign in one of the publisher environments that they have already stated they use on a regular basis. The responses around trust of the brand, and the following key brand measures that form the bedrock of traditional media effectiveness research, were then compared between those environments:

- Brand awareness
- Brand favourability
- Likelihood to recommend
- Intent to purchase

### DETAILED RESULTS

Original content sites saw the largest uplift, 37%, for exposed consumers over the control group in usage of branded search terms in the period of up to four weeks from first exposure to the campaign.



*Figure 1: Lift in advertiser-branded search term usage versus matched control group*

Original content sites also saw the largest uplift, 43%, for exposed consumers over the control group in the reach of the advertiser's own brand site in the period of up to four weeks from first exposure to the campaign. It is worth noting that for both search term usage and advertiser site visitation, display advertising in each of the three publisher environments generated substantial uplifts over the unexposed control group.

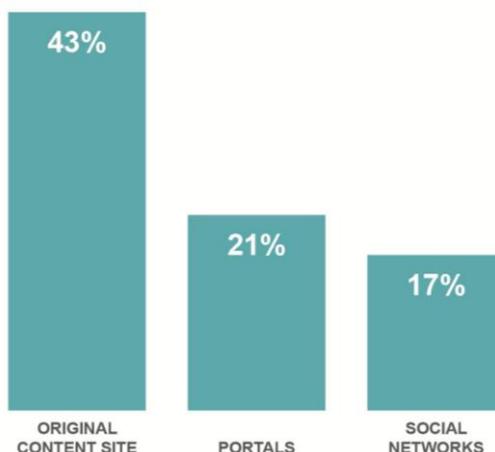


Figure 2: Lift in advertiser site visitation versus matched control group

From the survey research, it is evident that the results of the 2010 ‘New Rules of Engagement’ study still hold with respondents more likely to:

- a) Trust original content sites than the other two publisher environments.
- b) Trust the advertisers that appear on original content sites to a greater extent than those that appear on the other two publisher environments.

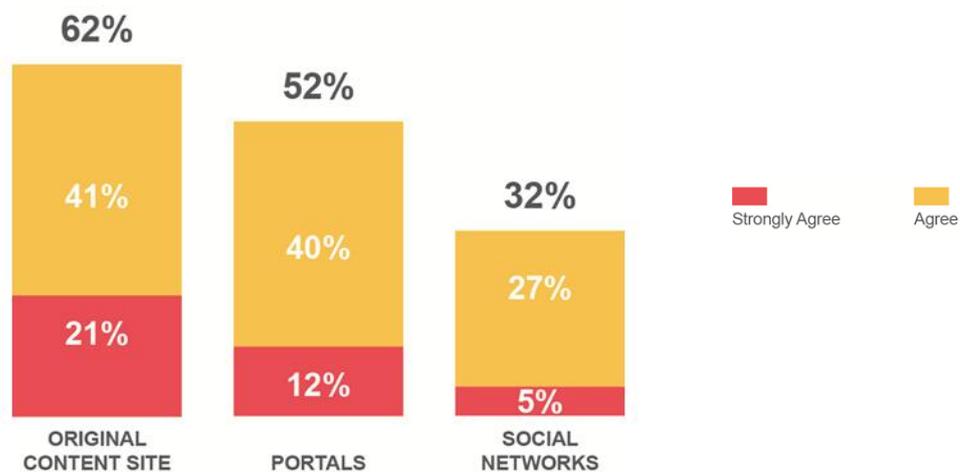


Figure 3: Consumer levels of agreement with statement that they ‘trust the publisher’

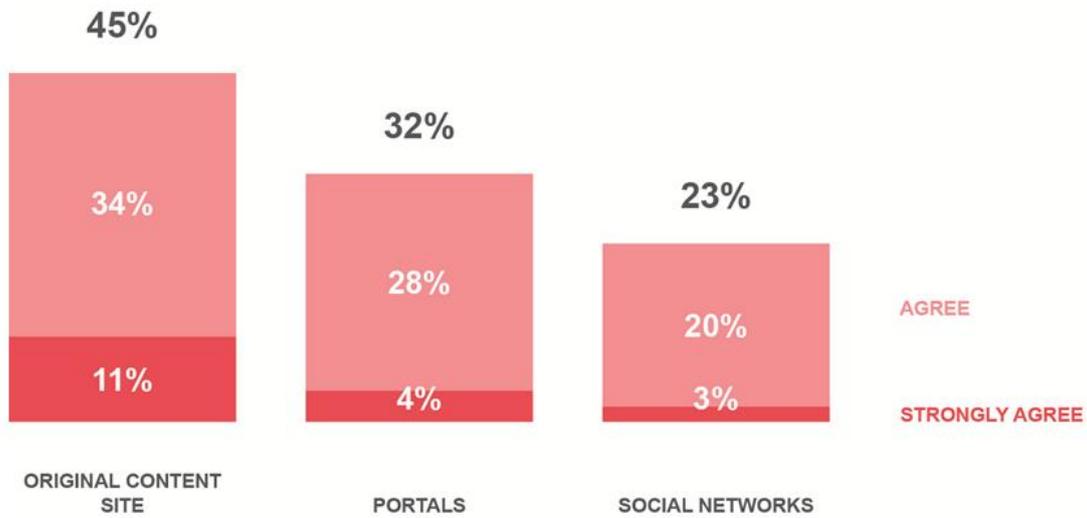


Figure 4: Consumer levels of agreement with statement that they 'trust the advertisers appearing on the publisher'

Responses were then analysed to ensure that no significant differences in advertiser awareness existed before answering the survey.

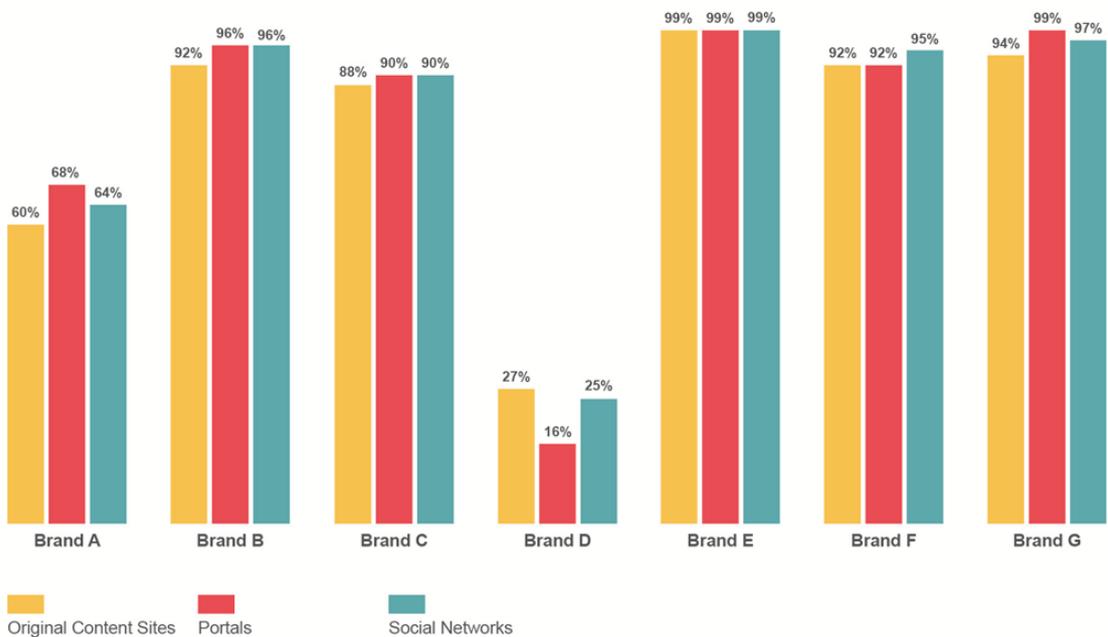


Figure 5: Pre-exposure awareness levels of advertiser brands by publisher environment

For the traditional measures of advertising effectiveness, original content sites were ranked highest of the three publisher environments based on the questionnaire responses:

- Brand favourability was highest for original content site respondents for six of the seven advertiser brands.
- Likelihood to recommend was twelve percentage points higher for original content site respondents versus the next best performing publisher environment.
- Intent to purchase was seven percentage points higher for original content site respondents versus the next best performing publisher environment.

The responses around the actions consumers had taken as a result of seeing display advertising in the different publisher environments were then grouped into key categories of Communications/Advocacy, Active Engagement and Direct Contact, and the results demonstrate again the value of original content sites over the other environments.

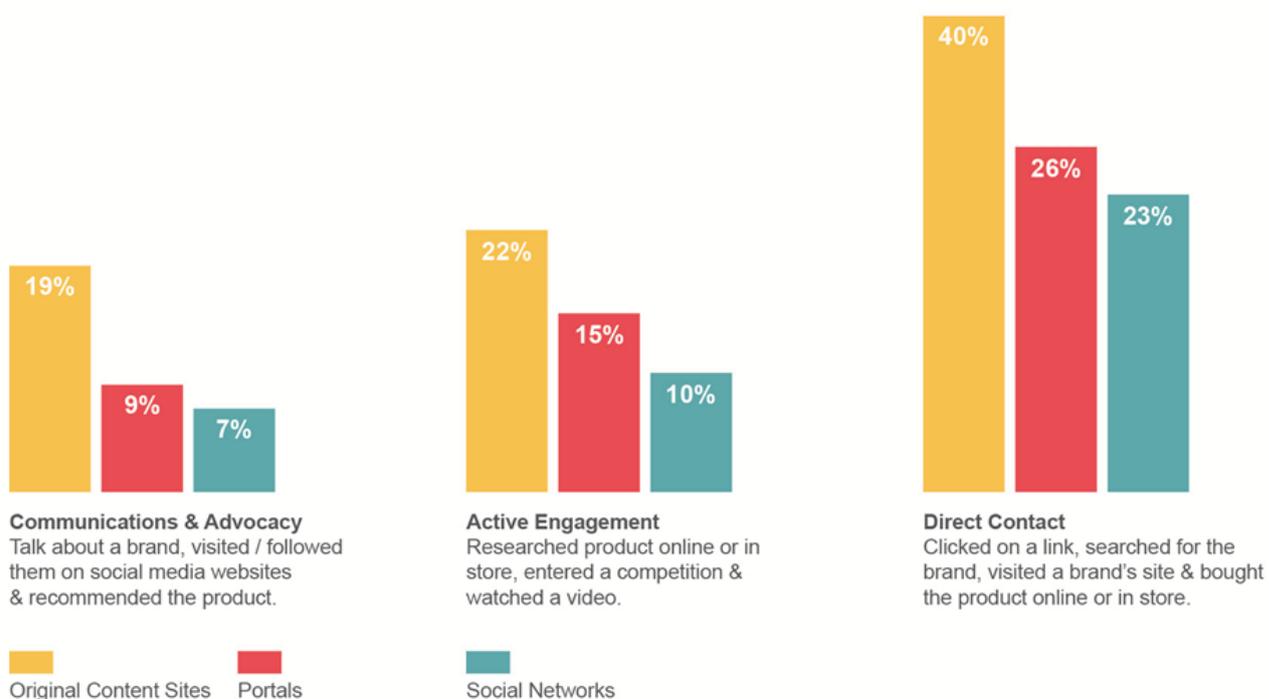
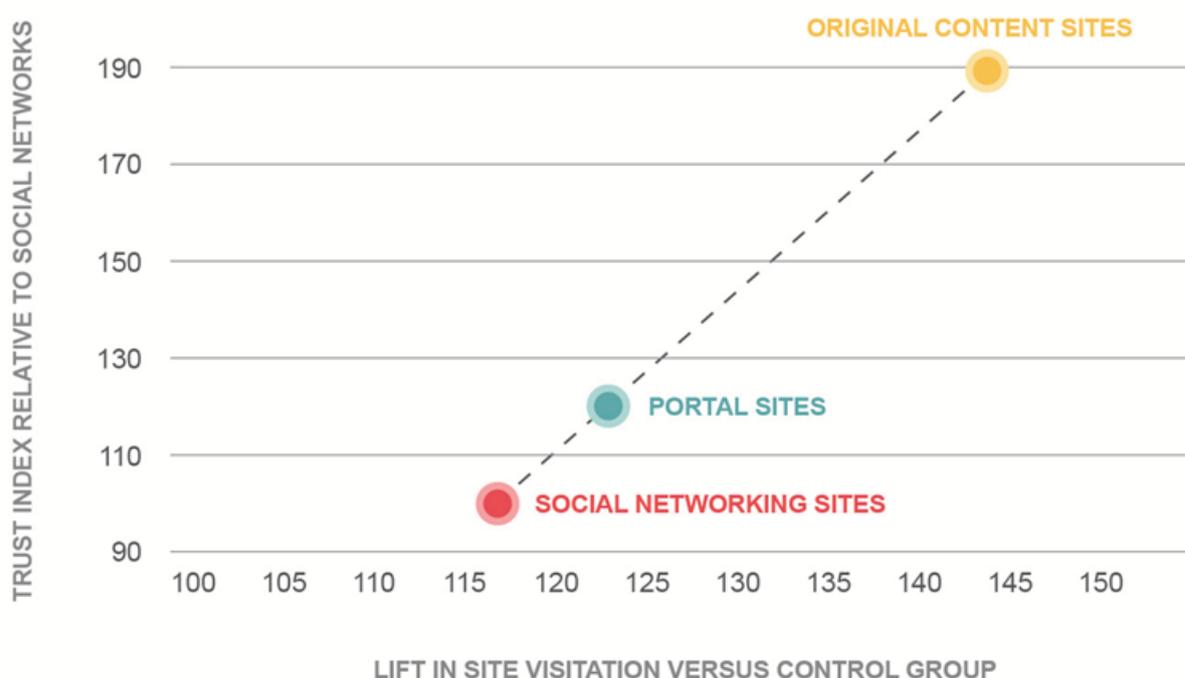


Figure 6: Analysis of actions consumers have taken as a result of exposure to advertising in the different publisher environments

Finally the overall level of trust in the publisher environments, derived from the survey research, was combined with the overall levels of advertiser site visitation amongst exposed consumers, from the panel observations, to create a view on the return on trust for advertisers. Figure 7 shows that:

- Display advertising in each environment drives advertiser site visitation.
- Original content sites outperform the other environments for both consumer trust and levels of subsequent advertiser site visitation.
- For every 10 ‘trust index points’, calculated based on the relative level of consumer trust for the publisher environment over the lowest performing environment (social networking sites), original content sites saw an incremental 4.7% lift in site visitation over the unexposed control group.



*Figure 7: Increasing consumer trust in the publisher environment goes hand in hand with increased advertiser site visitation*

This ‘trust multiplier’, whereby consumers have an increased likelihood of visiting the brand site of advertisers whose campaigns appear on trusted sites, has interesting ramifications for media planning, and the understanding of the value of display inventory across different publisher environments.

## CONCLUSIONS

In light of the ever-increasing body of evidence about the value for advertisers that ad exposure in trusted environments can bring, it is vital that media planners consider consumer trust levels in each placement they use. Original content sites continue to earn the highest levels of consumer trust versus other categories of online publisher, and consistently outperform those publisher categories in their ability to impact consumer attitudes and actions. Post campaign evaluation metrics should also reflect the level of trust in environment and brand, which we suggest is an additional valid metric for measuring campaign success and currently largely ignored. The next step for the industry is to consider how to factor trust levels into the media buying process in recognition of the differing value of those impressions based on the publisher environments into which they are served.

## ABOUT COMSCORE

comScore, Inc. (NASDAQ: SCOR) is a global leader in measuring the digital world and preferred source of digital business analytics. comScore helps its clients better understand, leverage and profit from the rapidly evolving digital marketing landscape by providing data, analytics and on-demand software solutions for the measurement of online ads and audiences, media planning, website analytics, advertising effectiveness, copy-testing, social media, search, video, mobile, cross-media, e-commerce, and a broad variety of emerging forms of digital consumer behaviour. comScore services, which now include the product suites of recent acquisitions AdXpose, Nedstat, Nexius XPlore, ARSGroup and Certifica, are used by more than 1,800 clients around the world, including global leaders such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon Services Group, ViaMichelin and Yahoo!.

## ABOUT AOP

The UK Association of Online Publishers (AOP) is an industry body representing digital publishing companies that create original, branded, quality content. AOP champions the interests of media owners from diverse backgrounds including newspaper and magazine publishing, TV and radio broadcasting, and pure online media.

Formed in 2002, AOP publishes original research, hosts forums, awards and conferences, covering a range of topics from managing online communities and adapting content for mobile, through to optimising partnership opportunities, SEO best practice, behavioural targeting and audience measurement.