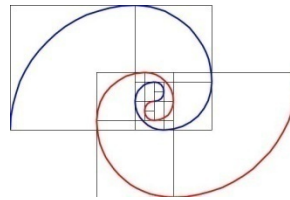


CNPA Banner Ad Network Participating Sites Survey



itz Belden



Updated: May 18, 2010



A New Network....

- CNPA offers a *unique* new network that...**we are building toward having nearly** every daily and weekly newspaper in California
- ❖ Buy access to this audience by...
 - ✓ Run of Network
 - ✓ Run of NorCal
 - ✓ Run of SoCal
 - ✓ Congressional Districts
 - ✓ Weeklies only
- ❖ California news and information Web sites provide an unmatched “last mile” audience

CNPA offers...

- ✓ A “**Web-Safe**” environment for your messaging—newspaper sites are “family safe.”
- ✓ An “**Ad-Friendly**” environment – people expect ads on news sites
- ✓ An exceptionally **positive and appropriate environment** for political messaging—people are already coming to sites for political and election information—give them your story directly.

CNPA News sites offer...

- Opportunities for placing **campaign videos**—AND getting them viewed
- Opportunities for **direct contact to your campaign sites** and staff via links and contact information in ads
- **Fundraising opportunities** —Site audiences are not only very well-heeled, they actively give to campaigns and candidates.

Waves One and Two Surveys Comparison

Wave One	February – April	Max N = 1,072 Starts
Wave Two (Ongoing to May 31)	May 7-31	Current N = 589 Starts

Data from Wave Two are preliminary. Final data will vary.

It is important to note that Wave Two is currently skewing from strong participation from LATimes.com visitors.

These data are expected to balance out in the final sample base which is currently expected to have a maximum N of 1,000.

Demographics Summary

	Wave One Max Sample 1,072	Wave Two Max Sample 589
California Resident	88%	85%
Gender	Men 48% Women 52%	Men 53% Women 47%
Age	Median: 52.9	Median: 50.8
Income	Median: \$72,960	Median: \$78,200
Employed	60%	61%
College Grad/+	50%	58%
White Collar	51%	58%
Retired	22%	16%
Minority Identity	21%	26%
Married	57%	53%
Children in Household	N/A	22%
Own Home	N/A	64%

Political Keys

	Wave One	Wave Two
Registered Voter	93%	89%
Intend to Vote	94%	90%
Political Orientation	Strong/Lean Rep. 23% Strong/Lean Dem. 33% Independent 22%	Strong/Lean Rep. 23% Strong/Lean Dem. 41% Independent 18%
Party Affiliation	Dem. 41% Rep. 32% Not Registered 21%	Dem. 46% Rep. 22% Not Registered 25%

Demo Detail: Age

Age Groups	Wave One	Wave Two
Under 18	1%	1%
18-24	4%	4%
25-34	8%	10%
35-44	16%	13%
45-54	22%	25%
55-64	26%	26%
65-74	16%	14%
75 or older	8%	7%
Median	52.9	50.8

Demo Detail: Income

	Wave One	Wave Two
- Under \$25,000	9%	9%
- \$25,000 - \$34,999	11%	8%
- \$35,000 - \$49,999	12%	10%
- \$50,000 - \$74,999	17%	17%
- \$75,000 - \$99,999	12%	12%
- \$100,000 - \$124,999	9%	7%
- \$125,000 - \$149,999	4%	7%
- \$150,000 or more	8%	9%
- Don't know/Prefer not to answer	19%	22%
Median	\$72,960	\$78,200

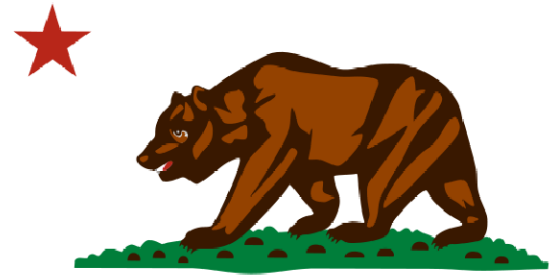
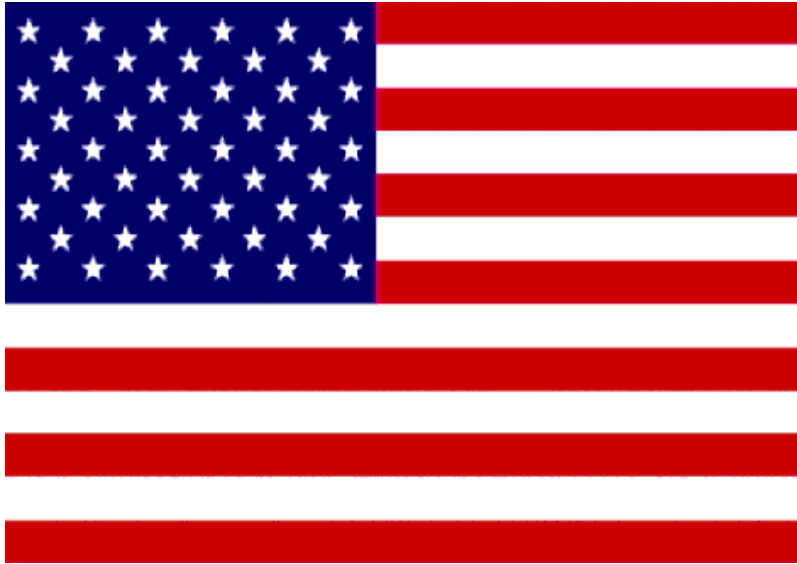
Demo Detail: Education

	Wave One	Wave Two
- High school graduate or less	9%	6%
- Special or technical training	6%	6%
- Some college/Associate degree	35%	30%
- College graduate (Bachelor's degree)	24%	25%
- Graduate studies	10%	13%
- Graduate degree (Master's/Ph.D.)	16%	21%
- None of these	1%	0%

Demo Detail: Ethnicity

	Wave One	Wave Two
- White	75%	70%
- Hispanic or Latino	11%	3%
- American Indian or Alaskan Native	5%	11%
- Asian or Pacific Islander	3%	7%
- African-American	2%	5%
MINORITY Net	21%	26%
- Other	2%	4%
- Prefer not to answer	9%	9%

Politics



CALIFORNIA REPUBLIC

Participation

Registered to Vote
Wave Two:

89%

Expect to Vote
Wave Two:

90%

	Wave One	Wave Two
Democrat	41%	46%
Republican	32%	22%
Green	1%	2%
Libertarian	1%	1%
Peace and Freedom	1%	1%
Other	5%	3%
Not a registered member of any party	21%	25%



22. In which, if any, political party are you a registered member?

Political Preferences

	Wave One	Wave Two
- Strong Republican	13%	9%
- Leaning Republican	10%	12%
- Independent	22%	18%
- Leaning Democrat	11%	16%
- Strong Democrat	21%	25%
- Other	5%	8%
- Prefer not to answer	18%	13%

23. Which of the following best describes your political preference?

Political Issues

	Wave One	Wave Two
The Economy	85%	85%
Jobs	81%	80%
Education & Schools	75%	77%
Health Care	66%	61%
Taxes	49%	47%
Illegal immigration	46%	52%
Crime	45%	44%
Environment	38%	46%
Energy	34%	40%
Drugs	34%	34%
Iraq-Afghanistan Wars	22%	22%
Terrorism	18%	19%
Other	6%	9%
None of the above	1%	0%
Other (please specify)	10%	12%

21. What do you think are the most important issues facing residents of California today? (Check as many as apply.)



Participation

	Wave One	Wave Two
Vote in a local election	81%	83%
Vote in a statewide election	80%	86%
Attend community or political events/rallies	36%	35%
Make a contribution to a political party or special interest group	22%	26%
Make a contribution to a particular candidate or Proposition campaign	21%	24%
None of the above	13%	10%

**22. In which of the following kinds of events and activities will you participate in the next 12 months?
(Check as many as apply.)**



Who is qualified?

	Wave One	Wave Two
Jerry Brown	43%	47%
Meg Whitman	30%	26%
Dianne Feinstein	29%	38%
Steve Poizner	12%	17%
John Garamendi	11%	12%
Gavin Newsom	10%	14%
Tom Campbell	10%	13%
Antonio Villaraigosa	6%	8%
Deacon Alexander	1%	1%
Other	5%	4%
None of above	20%	19%

24. [CALIFORNIA RESIDENTS ONLY] The race for the election of the governor of California will be coming up soon. Among this list of candidates, who do you think is qualified to be governor of California? (Check as many as apply.)

In an “Open Primary” Vote for today?

	Wave One	Wave Two
Jerry Brown	28%	32%
Meg Whitman	24%	21%
Dianne Feinstein	14%	9%
Steve Poizner	5%	9%
Tom Campbell	4%	5%
Gavin Newsom	3%	5%
John Garamendi	2%	3%
Antonio Villaraigosa	2%	3%
Deacon Alexander	0%	0%
Would not vote	17%	14%

25. If your choices for whom to vote were limited to this list and the election were held today, for whom would you vote?

Propositions – Wave Two Only

	Wave Two			
	For	Against	Undecided	N
Prop. 13 - Limits on property tax assessment. Seismic retrofitting of existing buildings.	41%	13%	46%	329
Prop. 14 - Elections. Increases right to participate in primary elections	42%	15%	43%	324
Prop. 15 - California Fair Elections Act. Repeals ban on public funding of political campaigns.	23%	29%	48%	328
Prop. 16 - Imposes new two-thirds voter approval requirements for local public electricity providers.	30%	31%	39%	327
Prop. 17 - Allows auto insurance companies to base their prices in part on a driver's history of insurance coverage	28%	32%	40%	328

Sen. Barbara Boxer Satisfaction – Wave Two Only

	Wave Two
Very satisfied	25%
Somewhat satisfied	19%
Neither satisfied nor dissatisfied	10%
Somewhat dissatisfied	8%
Very dissatisfied	25%
No opinion	14%
	N = 331

Sen. Barbara Boxer Vote for Today – Wave Two Only

	Wave Two
Very likely	34%
Somewhat likely	12%
Neither likely nor unlikely	5%
Somewhat unlikely	4%
Very unlikely	30%
Undecided/Don't know	15%
	N = 331

Covering California Voters...



Some Key Points...

- ✓ Network covers the state with unmatched density for single buy ad programs
- ✓ Very strong political participation -- +85% are registered to vote and *intend to do so*
- ✓ Strong audience demographics – particularly with respect to political
- ✓ 85% of daily users in California

Participation...Growing Daily

CNPA California Publications	Sites	Estimated Monthly Pageviews
Current NorCal - Dailies	42	115,000,000
Current SoCal - Dailies	24	315,000,000
Dailies Total	66	430,000,000
Current NorCal - Weeklies	47	23,500,000
Current SoCal - Weeklies	39	19,500,000
Weeklies Total	86	43,000,000
Current Combined Total	152	473,000,000

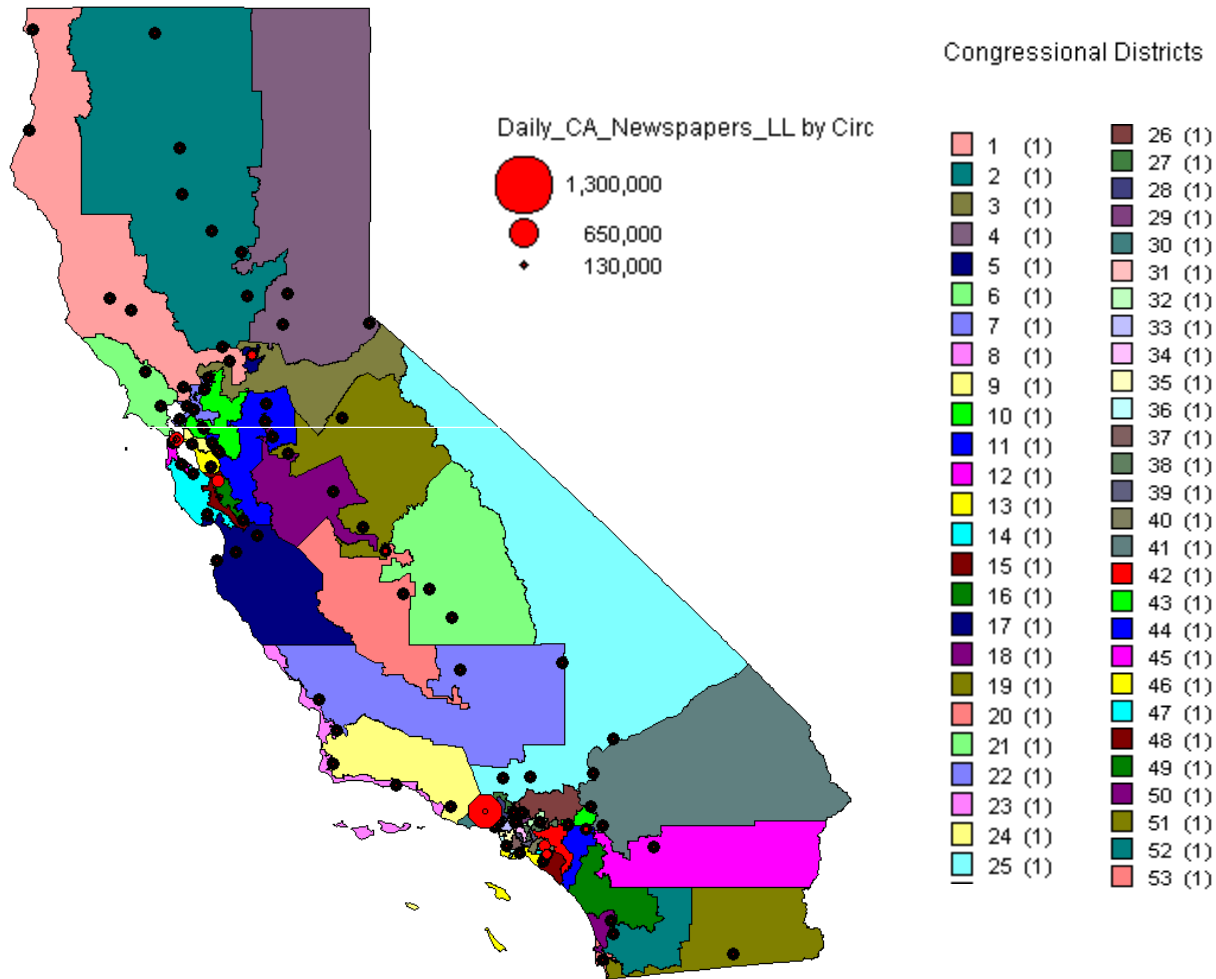
CNPA Dailies



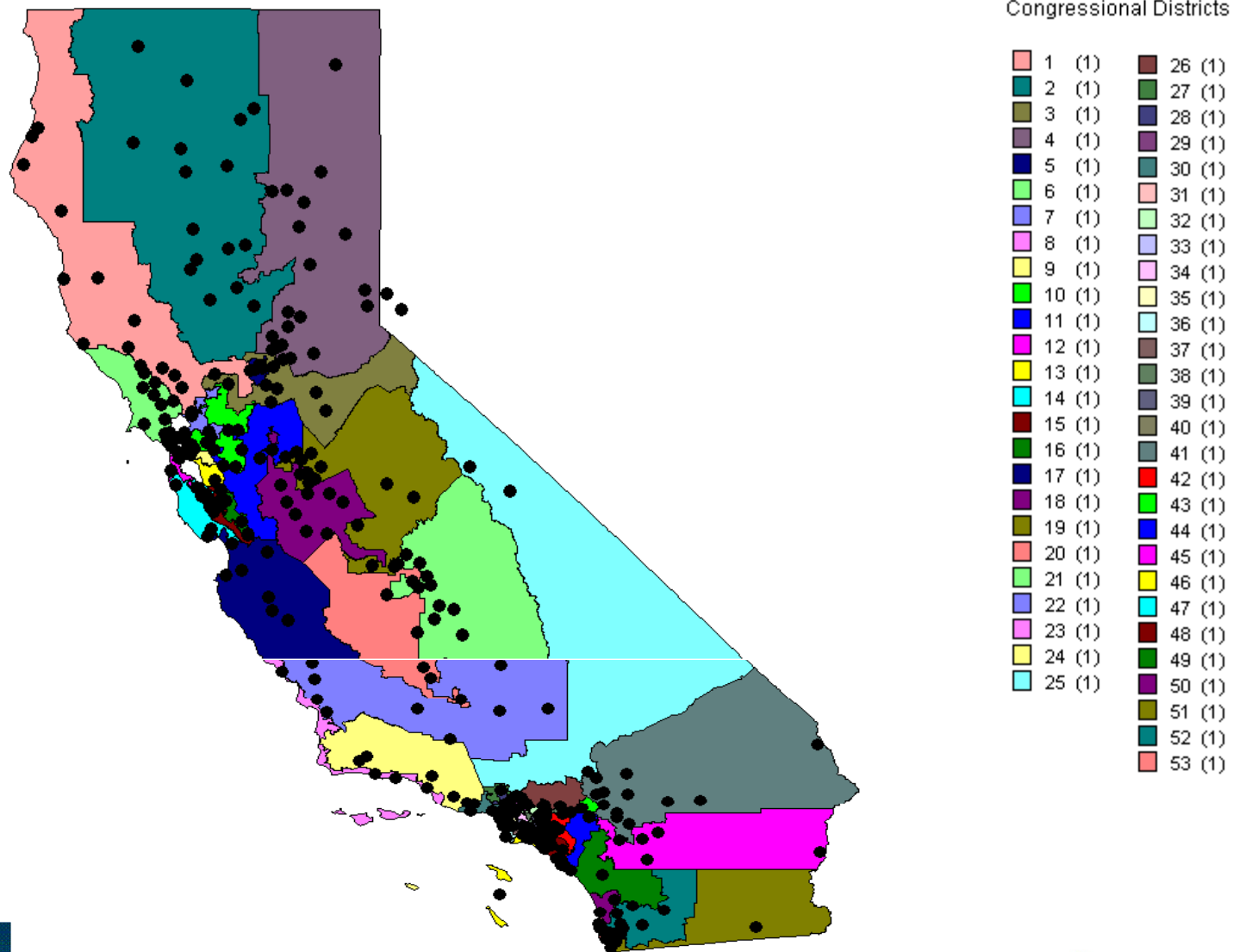
CNPA Weeklies



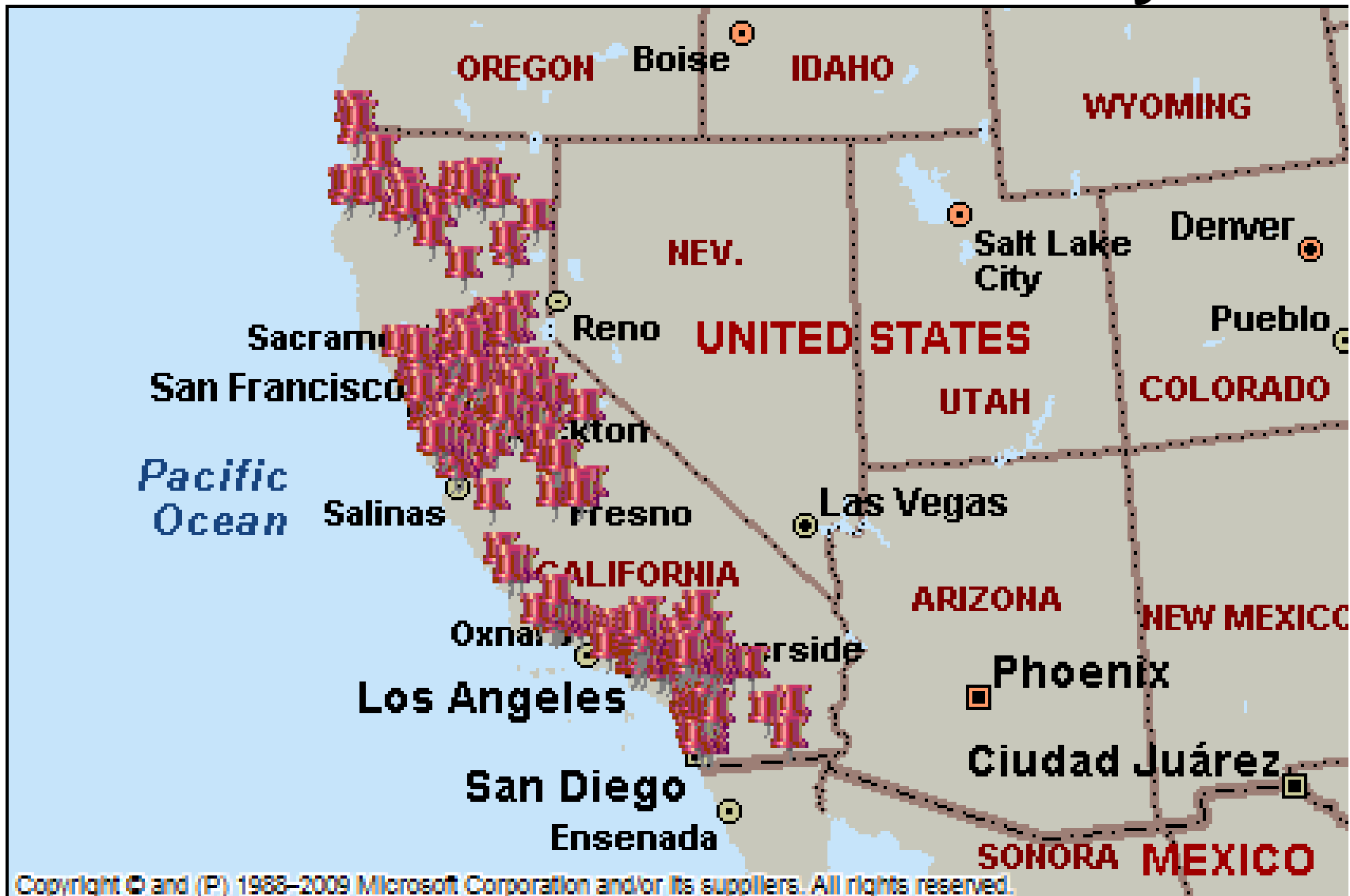
Congressional Districts



Congressional - Weeklies



ZIPs of Site Vistors Survey



Projected Site Visitors

CNPA Audience

Belden Projection March 2010 -- 12.5MM + adults

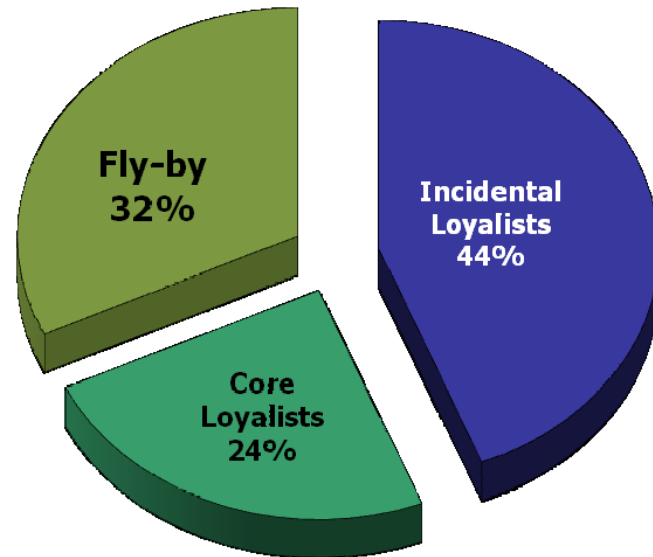
Every month CNPA Member sites generate over 500 million pageviews—as big as NYTimes.com

CNPA Member Sites' Visitor Prelim Projections

Fly-bys (One visit only):	32%
Incidentals(1-3 days):	44%
Core (19+days):	24%

NOTE: FLY-BY ABSOLUTE NUMBERS AND PROPORTIONS CAN VARY DRAMATICALLY FROM MONTH TO MONTH.

Preliminary Projections



Incidental = 3 or fewer visits in month

Core = 4 or more visits per month



March 2010

***Preliminary Projected Total Audience Reach:
12,500,000***

***Preliminary Projected Loyalist Audience Reach:
8,500,000***

California

- | | |
|-------------------------------------|------------------|
| • Local Population | 26MM |
| • In-State Loyalist Audience | 7,650,000 |
| • In-State Loyalist Reach | 29% |

State of

Estimates are for a standard 28-day month
PRELIMINARY PROJECTION N = 380

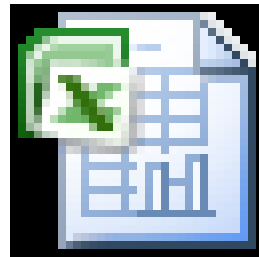


CNPA Network -- Current Dailies

City	Newspaper name	City	Newspaper name
Auburn	Auburn Journal	Palm Springs	The Desert Sun
Bakersfield	The Bakersfield Californian	Pasadena	Pasadena Star News
Chico	Enterprise Record	Redlands	Redlands Daily Facts
Covina	San Gabriel Valley Tribune	Riverside	The Press-Enterprise
Crescent City	The Daily Triplicate	Roseville	Roseville Press Tribune
Davis	Davis Enterprise	Sacramento	The Sacramento Bee
El Centro	Imperial Valley Press	Salinas	The Salinas Californian
Escondido	North County Times	San Bernardino	San Bernardino Sun
Eureka	Eureka Times-Standard	San Diego	San Diego Union-Tribune
Fairfield	Daily Republic	San Francisco	San Francisco Chronicle
Fresno	The Fresno Bee	San Francisco	San Francisco Examiner
Gilroy	Gilroy Dispatch	San Jose	San Jose Mercury News/BANG
Grass Valley	The Union	San Luis Obispo	The Tribune
Hollister	Hollister Free Lance	Santa Barbara	The Daily Sound
Lake County	Lake County Record Bee	Santa Clarita	The Signal
Lodi	Lodi News-Sentinel	Santa Maria	Santa Maria Times
Lompoc	Lompoc Record	Santa Rosa	Press Democrat
Long Beach	Long Beach Press Telegram	Sonoma	The Union Democrat
Los Angeles	Los Angeles Daily News	Stockton	The Record
Los Angeles	Los Angeles Times	Torrance	Torrance Daily Breeze
Madera	The Madera Tribune	Tulare	Tulare-Advance Register
Marysville	Appeal-Democrat	Ukiah	Ukiah Daily Journal
Merced	Merced Sun-Star	Vacaville	The Reporter
Modesto	The Modesto Bee	Vallejo	Times-Herald
Monterey	Monterey County Herald	Visalia	Visalia Times-Delta
Napa	Napa Valley Register	Whittier	Whittier Daily News
Novato	Marin Independent Journal	Woodland	Daily Democrat
Ontario	Inland Valley Daily Bulletin	Yreka	Siskiyou Daily News
Oroville	Oroville Mercury Register		



Partners – Weeklies



CNPA Weeklies
May 2010

Network Rate Card

Ad Options	Under 1MM Impressions	1.1MM to 10MM	10MM - 20MM	20MM+
Run of Network*	\$ 10.00	\$ 7.50	\$ 5.50	\$ 5.00
Partial Network**	\$ 15.00	\$ 12.50	\$ 11.00	\$ 8.00
Targeted***	\$ 20.00	\$ 17.50	\$ 16.00	\$ 12.00
Congressional Districts****	\$ 25.00	\$ 22.50	\$ 20.00	\$ 17.50

Thank you!



Contact CNPA

- Jack Bates, President -- (916) 288 6006
- Wolf Rosenberg, Assist. Dir. Ad. Svcs -- (916) 288 6036
- Maria Rodrigues, Network Manager -- (916) 288-6010



Contact ITZBelden Partners

- Greg Harmon, Partner – (415) 566 4348
- Greg Swanson, Partner – (503) 241 3650



Contact Madden Media

- Robert McCracken, Chief Innov. Off. -- (520) 322-0895
- Grady Colson, VP Operations -- (520) 232 2668
- Allison Cessna – Sr, Account Manager -- (520) 297-7178



Consumer Issues

Wave One Only Data

7-Day Media Use

Wave One Only	N	N Days/% +1 Day
Use the Internet	934	6.5 Days/99%
Visited this site	915	3.0 Days/80%
Visited other local or regional news sites	918	4.2 Days/88 %
Visited other local or regional information sites	866	3.9 Days/84%
Read or looked into a printed copy of a local daily newspaper	923	3.5 Days/798%
Read or looked into a printed copy of a local community weekly newspaper	915	2.1 Days/66%

3. Over the past 7 days, not including today, how many days did you do any of the following?



Online Frequency/Access

N = 359 Max		Wave One Only
4. Over the past 30 days, not including today, how many days have you visited this site? (Loyalist Audience)	941	16.3 Days
5. When was the first time you visited this site?	936	<u>1 Year + : 45%</u>
10. On an average weekday (Monday-Friday), from which locations do you usually access this site?	524	Home: 78% Office: 49%

Site visitors actively use the Web for consumer advice and info

N = 837	Wave One Only
Gone online to find information about products, services, or companies in your local area	89%
Used the Internet to gather information before making an offline purchase	77%
Gone online to gather more information after seeing an advertisement offline	64%
Gone online to compare prices from local businesses	54%

14. Which of the following have you done in the past 12 months? (Check as many as apply.)

Print and online are key ad and information sources

N = 827	Wave One Only Sources Used
Other Internet	59%
Local daily or weekly community newspaper print edition (including inserts and store circulars)	50%
Store catalogs mailed to your home	34%
Store circulars mailed to your home	33%
Local daily or community newspaper Web site	25%
TV	23%
Weekly "Shoppers" (newspapers containing mostly advertising and little news)	18%
Magazines	16%
Val-Pak coupons mailed to your home	11%
Yellow Pages	10%
Radio	9%
Other	5%



15. When considering purchasing goods and services of over \$100 value, on which sources for advertising or information do you most rely? (Check as many as apply.)

Verticals Purchase Interest

N = 812		Wave One Only Expect to purchase or
Restaurants and movie theaters		59%
Personal travel		57%
Entertainment events/movies		55%
Family entertainment and attractions		38%
Banking or Financial services		29%
New or used automobiles and trucks		25%
Jobs search		24%
Education or training		22%
Insurance (home, auto, life, health)		22%
Real estate to buy, sell, or rent		20%
Travel for business		15%



16. Which of the following products and services, if any, do you expect to purchase or consider purchasing in the next 12 months? (Check as many as apply.)

Consumer Buying Intentions

N = 812	Wave One Only
Books/music/hobbies supplies	63%
Gardening	48%
Pet supplies	47%
Dining & Specialty Foods	42%
RX and OTC drugs	42%
Computer (desktop or laptop)/electronics	42%
DIY home improvement	33%
Sporting goods	29%
Furniture	27%
Cameras or Photography equipment	27%
Toys	18%
Large Appliances	15%

17. Which of the following products and services, if any, do you expect to purchase or consider purchasing in the next 12 months? [Select as many as apply.]

Interaction with online ads

N = 797		Wave One Only Actions
Ads that relate to the content of a page or your search criteria		37%
Sponsored links in a search result		35%
Display ad within a page (such as a banner ad)		31%
Email from a business being advertised		29%
Online video ad		13%
Ads that float on screen for 5-10 seconds and can, if the user elects, be bypassed		9%
Pop up ad		8%
Ads with sounds/video that start automatically		6%
Have not noticed or clicked		32%

18. Thinking about all the Web sites you visit and various types of ads you see online, which ads have you noticed and/or clicked. (Check as many as apply.)

Technology Owned

Wave One Only	N	Currently own/subscribe	Considering buying/subscribing
DVD Player	732	94%	2%
Digital Camera	724	90%	2%
Laptop or Notebook portable computer	696	77%	9%
Wi-Fi on laptop or home computer	666	70%	6%
Standard cell phone without Internet access	638	59%	2%
iPod or similar digital music device	622	51%	6%
Use GPS locator for driving, hiking, camping, etc.	624	45%	9%
DirecTV, Dish Network (TV), ZoomTV, or other Satellite TV	634	44%	5%
Standard cell phone with Internet access	623	40%	7%
TiVo or other Digital Video Recorder	611	39%	6%
Xbox, PlayStation, Wii, or other electronic game device	613	38%	5%
iPhone, Droid, Blackberry, or other "Smartphone"	628	34%	11%
Sirius/XM Radio, or other Satellite Radio	595	21%	7%
Kindle from Amazon, Apple iPad, or other "e-Reader"	584	9%	14%

33. Consumer Use of Technology/Access Which of the following new technologies do you subscribe to or currently own or use? (Select as many as apply.)



Technology Used

Wave One Only	N	Currently do/use registered/subscribe	Considering doing/using registering/subscribing
Access YouTube.com	657	64%	5%
Text messaging on cell phone	659	61%	7%
Facebook.com	701	59%	7%
Instant messaging (IM) on computer	629	43%	6%
Access information like sports scores, headlines, stock quotes, etc. by cell phone or other mobile device	625	41%	4%
Use Flickr, Kodak, or other online photo services	613	35%	6%
Subscribe to Netflix	612	34%	8%
Online Games	614	34%	5%
Custom ringtones	598	26%	6%
Twitter.com	619	26%	6%
Use computer video camera for live telephone calls	611	24%	10%
Buy phone apps for iPhone or other smartphone	604	23%	6%
MySpace.com	619	22%	3%
Own vehicle with OnStar, Lojack, or similar system	606	19%	6%

**30. Which of the following technologies do you currently own or subscribe to?
(Check one response for each item.)**