A SUPPLEMENT TO
Advertising Age

# DIGITAL MARKETING & MEDIA

## FACT PACK



crain
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# DIGITAL MARKETING AND MEDIA

## DATA ON THE DIGITAL WORLD

LET'S FACE IT. It's becoming critical to stay atop the digital media and marketing space, but the pace of technological change is making it increasingly difficult. That's why we've again pulled together the important data and trends to serve as a guide to marketing in this space. This, our second annual Digital Fact Pack, is full of fascinating numbers. Some highlights:

Big players continue to dominate online advertising, thanks to both their audience scale and their ability to re-aggregate smaller, disparate audiences. The top 10 online properties took in 99% of 2006 gross online ad revenue. Net online ad revenue is a slightly less stilted story, but continues to illustrate that when it comes to online ad revenue, the Long Tail of the web has a big, fat head (Page 11).

48.3% of Americans will be hooked up to a broadband connection this year and $243.1 billion will be spent in U.S. online retail sales.

After breaking onto the scene a few years ago, social networking is flourishing. MySpace and Facebook continue to defy gravity, growing 72.5% and 59.2% (Feb. '07 versus Feb. '06), respectively, and, depending on what surveys you use, advertisers are set to spend between 4.7% and 7.7% of their online ad budgets on the space (Pages 20 and 46).

While new mobile applications are picking up steam, consumers they have not yet warmed to the idea of advertising. In fact, more than half of consumers are not at all willing to watch ads on their phones in return for free mobile phone applications (Page 42).

That's just a taste of what's inside. We slice ad spending by category and take an in-depth look at the different areas in which marketers are spending their online dollars. It's important to note the interactive realm is monitored by dozens of companies, media and trade groups. Since their methodologies vary, totals do, too..

Oh, and speaking of the ever-changing digital space, since last year's Fact Pack we've doubled the frequency of our dedicated digital section in the print version of Ad Age and launched a weekly newsletter that rounds up the best of our digital coverage. So use this Digital Marketing & Media Fact Pack as a guide, but visit **AdAge.com/digital** for continuous coverage of the space.

—ABBEY KLAASSEN

### EMERGING MEDIA

Data from American Advertising Federation (AAF), November 2006, via eMarketer. Shows the percentage of media budgets allocated to select emerging media according to U.S. advertising executives.

| MEDIA | % OF BUDGET |
|---|---|
| Search | 27.0% |
| Online video | 14.9 |
| Blogs | 8.4 |
| Podcasts | 8.0 |
| Social networking | 7.7 |
| RSS | 5.5 |
| Mobile | 5.2 |
| Video games | 3.6 |

COVER PHOTO BY PAUL COOKLIN

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# OVERVIEW

## U.S. ONLINE AD SPENDING BY FORMAT

Data from eMarketer, February 2007, which benchmarks its U.S. online advertising spending projections against the Interactive Advertising Bureau (IAB)/PricewaterhouseCoopers (PwC) data, for which the last full year measured was 2005; online ad data include categories as defined by IAB/PwC benchmark–display ads (such as banners), paid search ads (including contextual text-links), rich media (including video), classified ads, sponsorships, referrals/lead generation, e-mail (embedded third-party ads in emails, not email marketing) and slotting fees. Dollars in millions.

| | | PROJECTED ANNUAL REVENUE | | | | | | '06-'11 |
|---|---|---|---|---|---|---|---|---|
| FORMAT | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | % CHANGE |
| **Paid search** | $5,142 | **$6,970** | $8,288 | $10,234 | $12,224 | $14,212 | $16,151 | **131.7** |
| **Rich media/video** | 1,003 | **1,476** | 2,145 | 2,916 | 3,794 | 5,007 | 6,205 | **320.4** |
| **Display ads** | 2,634 | **3,444** | 3,900 | 4,522 | 5,058 | 5,491 | 5,840 | **69.6** |
| **Classified** | 2,132 | **2,788** | 3,315 | 4,046 | 4,637 | 5,168 | 5,840 | **109.5** |
| **Referrals** | 753 | **902** | 975 | 1,071 | 1,265 | 1,292 | 1,278 | **41.7** |
| **Sponsorships** | 502 | **492** | 488 | 536 | 562 | 485 | 456 | **-7.3** |
| **E-mail** | 251 | **164** | 195 | 238 | 281 | 323 | 365 | **122.6** |
| **Slotting fees** | 125 | **164** | 195 | 238 | 281 | 323 | 365 | **122.6** |
| **Total** | 12,542 | **16,400** | 19,500 | 23,800 | 28,100 | 32,300 | 36,500 | **122.6** |

## BEHAVIORAL TARGETING: REACHING POTENTIAL BUYERS

Data from Forrester Research's NACTAS 2006 Benchmark Survey.

| NEW APPLICATION | TECHNOLOGY OWNERSHIP TO IDENTIFY ENABLED CONSUMERS | ONLINE BEHAVIOR TO IDENTIFY POTENTIAL BUYERS | INTENSITY OF BEHAVIOR TO IDENTIFY EARLY ADOPTERS |
|---|---|---|---|
| **VIDEO STREAMING SERVICES** | Has broadband and a home network | Downloads video or music today | Top quartile of time spent with video |
| | 15% of market | 8% of market | 2% of market |
| **MUSIC ON CELL PHONES** | Uses mobile data service | Downloads music or listens to internet radio | Does these at least a few times weekly |
| | 15% of market | 7% of market | 3% of market |
| **ONLINE CONSUMER-DIRECTED HEALTH PLAN** | Has broadband | Ever done research into a disease, drug or doctor | Top quartile of time spent online |
| | 40% of market | 26% of market | 11% of market |

# WEBSITES

## TOP FIVE PORTAL SITE COS. BY UNIQUE VISITORS

Ranking based on data from comScore Media Metrix. Sales and earnings from public documents. Ad spending is U.S. measured media ad spending from TNS Media Intelligence. *Fiscal year ends June 30. ** Yahoo '05 net income included about $1 billion in special gains and tax benefits; '06 net income reduced $222 million by accounting change.

### Yahoo yahoo.com; Sunnyvale, Calif.

**128.6 million unique visitors a month averaged 281.5 minutes on the sites.**

| NUMBERS | 2006 | 2005 | % CHG |
|---|---|---|---|
| Revenue (billions) | $6.43 | $5.26 | 22.2 |
| Net income (billions)** | 0.75 | 1.90 | -60.4 |
| Ad spending (millions) | 35.3 | 36.6 | -3.6 |

**EXECUTIVES**

11,400 employees led by Terry S. Semel, chmn & CEO; Jerry Yang, co-founder & chief Yahoo; David Filo, co-founder & chief Yahoo; TOP MKTG EXEC: Cammie Dunaway, chief mktg officer

### Time Warner aol.com, cnn.com, multiple media sites; New York

**117.9 million unique visitors a month averaged 269.8 minutes on the sites.**

| NUMBERS | 2006 | 2005 | % CHG |
|---|---|---|---|
| Revenue (billions) | $44.22 | $42.40 | 4.3 |
| Net income (billions) | 6.55 | 2.67 | 145.3 |
| Ad spending (millions) | 1,837.2 | 2,074.4 | -11.4 |

**EXECUTIVES**

92,700 employees led by Richard D. Parsons, chmn & CEO-Time Warner; Randy Falco, chmn & CEO-AOL; TOP MKTG EXEC: John Partilla, pres-Time Warner Global Mktg

### Google google.com, youtube.com; Mountain View, Calif.

**114.7 million unique visitors a month averaged 79.5 minutes on the sites.**

| NUMBERS | 2006 | 2005 | % CHG |
|---|---|---|---|
| Revenue (billions) | $10.60 | $6.14 | 72.8 |
| Net income (billions) | 3.08 | 1.47 | 110.1 |
| Ad spending (millions) | 20.5 | 8.1 | 152.8 |

**EXECUTIVES**

10,674 employees led by Eric E. Schmidt, chmn & CEO; Larry Page, co-founder & pres-products; Sergey Brin, co-founder & pres-tech; TOP MKTG EXEC: David Lawee, VP-mktg

### Microsoft Corp. msn.com, msnbc.com (joint venture), microsoft.com; Redmond, Wash.

**114.2 million unique visitors a month averaged 167.0 minutes on the sites.**

| NUMBERS | 2006 | 2005 | % CHG |
|---|---|---|---|
| Revenue (billions)* | $44.28 | $39.79 | 11.3 |
| Net income (billions)* | 12.60 | 12.25 | 2.8 |
| Ad spending (millions) | 447.0 | 461.9 | -3.2 |

**EXECUTIVES**

71,000 employees led by William H. Gates III, chmn; Steven A. Ballmer, CEO; TOP MKTG EXEC: Mich Mathews, senior VP-central mktg group.

### eBay ebay.com; San Jose, Calif.

**79.6 million unique visitors a month averaged 73.9 minutes on the site.**

| NUMBERS | 2006 | 2005 | % CHG |
|---|---|---|---|
| Revenue (billions) | $5.97 | $4.55 | 31.1 |
| Net income (billions) | 1.13 | 1.08 | 4.0 |
| Ad spending (millions) | 144.4 | 158.2 | -8.8 |

**EXECUTIVES**

13,200 employees led by Pierre M. Omidyar, chmn; Margaret C. Whitman, pres & CEO; TOP MKTG EXEC: John Donahoe, pres-eBay Marketplace

# TOP 25 PARENT WEB SITES BY UNIQUE VISITORS

Source: comScore Media Metrix. Unique visitors in thousands for 175,653,000 total visits in February 2007 versus 166,966,000 visits in February 2006. ComScore defines unique visitors as "the estimated number of different individuals that visited any content of a website, a category, a channel, or an application during the reporting period." This is a measure of visitors, not the number of registered users, subscribers, or videos streamed. *Percentage increase due to the inclusion of numerous Fox acquisitions, including MySpace, which was added to Fox data in August 2006. Rankings by category continue on Pages 16 through 21. Average minutes are per visitor.

| RANK | SITE | UNIQUE VISITORS (000) | % CHG VS. 2/06 | AVERAGE MINUTES |
|---|---|---|---|---|
| 1 | **Yahoo sites** | 128,559 | 7.1 | 281.5 |
| 2 | **Time Warner network** | 117,942 | 6.8 | 269.8 |
| 3 | **Google sites** | 114,694 | 21.2 | 79.5 |
| 4 | **Microsoft sites** | 114,155 | 3.0 | 167.0 |
| 5 | **eBay** | 79,559 | 19.4 | 73.9 |
| 6 | **Fox Interactive Media** (incl. MySpace)* | 77,969 | 461.5 | 162.3 |
| 7 | **Amazon sites** | 48,905 | 14.6 | 16.5 |
| 8 | **Ask network** | 48,722 | 13.2 | 17.4 |
| 9 | **Wikipedia sites** | 43,656 | 122.3 | 12.5 |
| 10 | **New York Times Digital** | 39,769 | 14.1 | 10.8 |
| 11 | **Viacom Digital** | 39,128 | NA | 47.0 |
| 12 | **The Weather Channel** | 37,374 | 34.0 | 11.9 |
| 13 | **Apple** | 36,767 | 51.5 | 8.7 |
| 14 | **CNET networks** | 29,881 | 12.8 | 17.8 |
| 15 | **Gorilla Nation** | 29,098 | 40.1 | 13.9 |
| 16 | **AT&T** | 27,391 | 22.5 | 34.7 |
| 17 | **Adobe Sites** | 26,035 | 18.9 | 3.4 |
| 18 | **Wal-Mart** | 25,125 | 19.7 | 15.2 |
| 19 | **Expedia** | 25,060 | −1.3 | 15.9 |
| 20 | **United Online** | 24,773 | −0.2 | 25.3 |
| 21 | **CBS Corp.** | 23,045 | 22.7 | 20.9 |
| 22 | **Target Corp.** | 23,038 | 15.9 | 11.1 |
| 23 | **Monster Worldwide** | 22,794 | −5.2 | 13.9 |
| 24 | **Lycos** | 22,341 | −4.7 | 7.2 |
| 25 | **Disney Online** | 21,959 | NA | 48.9 |
| | **Total visits across all categories** | 175,653 | 0.0 | 1,721.9 |

# U.S. ONLINE ADVERTISING MARKET

Data from IAB/PricewaterhouseCoopers, Piper Jaffray, company reports, via Marketspace. Share includes intercompany transactions.

| RANK | SITE | ALL AD REVENUE IN 2006 GROSS | NET | SHARE OF TOTAL IN 2006 GROSS | NET |
|---|---|---|---|---|---|
| 1 | **Google** | $6.0 | $4.1 | 36.1% | 24.7% |
| 2 | **Yahoo** | 4.6 | 3.0 | 27.7 | 18.1 |
| 3 | **AOL** | 1.9 | 1.3 | 11.6 | 7.8 |
| 4 | **MSN** | 1.5 | 1.1 | 9.2 | 6.8 |
| 5 | **IAC** | 0.5 | 0.4 | 3.2 | 2.6 |
| 6 | **CNET** | 0.4 | 0.4 | 2.6 | 2.3 |
| 6 | **Fox Interactive** | 0.4 | 0.4 | 2.6 | 2.3 |
| 8 | **Viacom** | 0.4 | 0.4 | 2.6 | 2.3 |
| 9 | **Disney Internet Group** | 0.3 | 0.3 | 2.0 | 1.7 |
| 10 | **New York Times Digital** | 0.3 | 0.2 | 2.0 | 1.4 |
| | **Top 4** | 14.2 | 9.6 | 85.0 | 57.0 |
| | **Top 10** | 16.7 | 11.8 | 99.0 | 70.0 |
| | **Total U.S. online advertising** | 16.8 | | | |

# TOP 50 U.S. PARENT WEB SITES BY DISPLAY AD REVENUE

Data from TNS Media Intelligence on more than 2,800 sites. Dollars are in millions for calendar 2006, represent only display advertising; excludes search and broadband video. Percent change computed versus 2005 data, not shown.

| RANK | SITE | U.S. AD SPENDING | % CHANGE |
|---|---|---|---|
| 1 | Yahoo | $1,157.9 | 5.8 |
| 2 | Microsoft Network | 939.4 | 21.6 |
| 3 | AOL Media Network | 778.9 | -14.7 |
| 4 | Time Warner | 326.6 | 16.2 |
| 5 | New York Times and About.com | 239.7 | 16.5 |
| 6 | Lycos Network & Terra Lycos | 207.3 | -4.2 |
| 7 | AT&T | 205.2 | 3.5 |
| 8 | CNET | 198.7 | 12.1 |
| 9 | ABC Internet Group | 188.8 | 16.8 |
| 10 | ESPN Internet Group | 182.5 | 77.7 |
| 11 | Fox and News Corp. | 176.8 | 52.5 |
| 12 | Excite Network | 172.2 | 2.8 |
| 13 | Dow Jones | 163.7 | 9.2 |
| 14 | American Greetings | 118.0 | -5.5 |
| 15 | ZDnet | 109.3 | 120.5 |
| 16 | USA Today & Gannett Co. | 104.5 | 43.2 |
| 17 | Weather.com | 73.0 | -25.0 |
| 18 | Cox Enterprises | 72.7 | 16.0 |
| 19 | E.W. Scripps | 69.7 | 23.5 |
| 20 | Viacom | 69.2 | 15.4 |
| 21 | Tradetrek.com | 67.7 | 160.7 |
| 22 | Washington Post | 66.4 | -22.7 |
| 23 | Gay.com | 65.8 | 59.3 |
| 24 | Condenet/Conde Nast | 61.5 | 38.9 |
| 25 | IDG.net | 59.3 | 97.3 |
| 26 | Playboy | 59.3 | 17.5 |
| 27 | Orbitz | 58.7 | 46.7 |
| 28 | TheStreet.com | 58.3 | 44.7 |
| 29 | Travelocity.com | 57.3 | 44.8 |
| 30 | TV Guide Online | 56.2 | 31.0 |
| 31 | Internet Movie Database (IMDB) | 55.9 | 26.4 |
| 32 | Ticketmaster | 55.0 | 90.2 |
| 33 | Flipside.com | 54.5 | -7.4 |
| 34 | CBS Internet Group | 51.2 | 93.8 |
| 35 | Morningstar.com | 50.7 | -6.8 |
| 36 | Homestore.com | 49.5 | 14.6 |
| 37 | SmartMoney.com | 45.9 | 16.1 |
| 38 | Hearst Publications | 45.7 | 63.2 |
| 39 | ClearStation | 44.9 | 20.9 |
| 40 | Forbes | 43.3 | 32.4 |
| 41 | Egreetings Network | 41.4 | 54.2 |
| 42 | ivillage | 41.0 | 43.0 |
| 43 | DealTime.com | 40.9 | 24.6 |
| 44 | Emdeon | 39.1 | 48.1 |
| 45 | New York Daily News Online | 38.8 | -10.8 |
| 46 | Internet.com | 33.7 | 24.7 |
| 47 | Fool.com | 33.3 | 29.5 |
| 48 | Nasdaq | 33.1 | 12.5 |
| 49 | Univision | 32.4 | 39.5 |
| 50 | Kelley Blue Book | 31.8 | 36.3 |

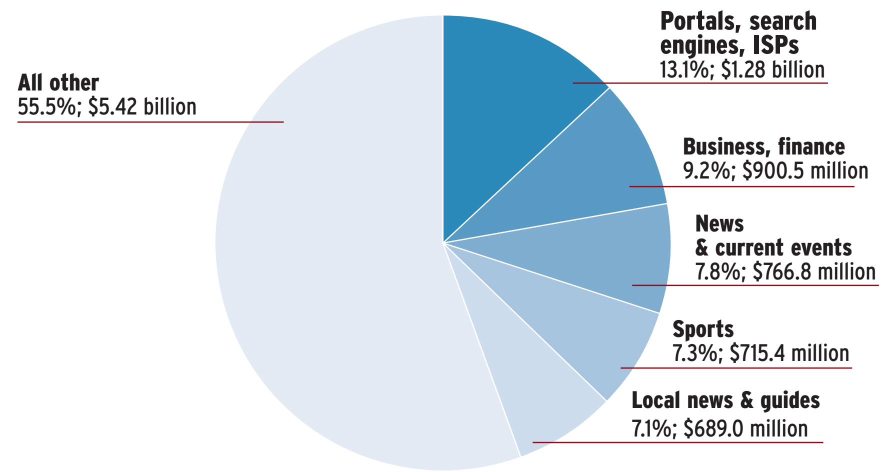
# TOP 25 WEB SITE CATEGORIES BY AD REVENUE

Data from TNS Media Intelligence on more than 2,800 sites. Dollars are in millions for calendar 2006 and represent only display advertising; excludes search and broadband video. Percent change computed versus 2005 data, not shown. *No. 1 is multi-service such as MSN, Yahoo and AOL and No. 10 is just portals and search engines such as Ask and About. Categories are from TNS.

| RANK | TYPE OF SITE | U.S. AD SPENDING | % CHANGE |
|---|---|---|---|
| 1 | Portals, search engines & ISPs: Multiservice* | $1,277.9 | 13.1 |
| 2 | Business, finance, investing | 900.5 | 25.5 |
| 3 | News & current events | 766.8 | 9.1 |
| 4 | Sports | 715.4 | 31.0 |
| 5 | Local news & guides | 689.0 | 48.3 |
| 6 | General interest/general entertainment | 644.1 | 16.1 |
| 7 | Computing & technology | 523.8 | 62.6 |
| 8 | Movies, videos, TV & cable | 374.0 | 1.6 |
| 9 | TV stations | 340.9 | 21.2 |
| 10 | Portals & search engines | 318.6 | 5.0 |
| 11 | Games | 315.0 | 5.4 |
| 12 | Health & fitness | 282.0 | -22.8 |
| 13 | Travel | 260.1 | 15.2 |
| 14 | Internet service providers* | 229.7 | 3.2 |
| 15 | Automotive | 206.8 | 15.5 |
| 16 | Cards & screen savers | 199.0 | 16.3 |
| 17 | Common cultures/communities | 138.1 | 35.9 |
| 18 | Music, broadcasts & radio | 134.4 | -9.9 |
| 19 | Real estate | 116.4 | 11.3 |
| 20 | Shopping | 109.2 | 34.1 |
| 21 | Special interests/hobbies | 109.1 | 25.0 |
| 22 | Food | 107.7 | 31.1 |
| 23 | Meeting places | 85.1 | 21.5 |
| 24 | Hispanic | 81.3 | 64.1 |
| 25 | Education & reference | 75.0 | 27.9 |
| | Total | 9,769.8 | 17.5 |

# WHERE $9.77 BILLION IS SPENT

Source: TNS Media Intelligence for calendar 2007. See table on facing page.



# TOP 5 SITES IN 16 MAJOR CATEGORIES

Source: comScore Media Metrix. Unique visitors in thousands for more than 175 million total visits in February 2007. Rankings continue through Page 21. More extensive notes about visitors are on Page 10.

| RANK | SITE | UNIQUE VISITORS FEB. 2007 | UNIQUE VISITORS FEB. 2006 | % CHANGE |
|---|---|---|---|---|
| **AUTOMOTIVE** | | | | |
| 1 | eBay Motors U.S. | 12,592 | 9,160 | 37.5 |
| 2 | General Motors Corp. | 8,340 | 8,000 | 4.2 |
| 3 | Ford Motor Co. | 6,237 | 6,009 | 3.8 |
| 4 | AutoTrader | 6,067 | 4,743 | 27.9 |
| 5 | KBB.COM | 5,601 | 5,270 | 6.3 |
| **NEWS/RESEARCH** | | | | |
| 1 | Yahoo Finance | 11,945 | 8,679 | 37.6 |
| 2 | AOL Money & Finance | 11,676 | 10,583 | 10.3 |
| 3 | MSN Money | 11,016 | 11,574 | -4.8 |
| 4 | Dow Jones & Co. | 5,407 | 6,620 | -18.3 |
| 5 | CNN Money | 5,248 | 5,716 | -8.2 |
| **CAREER SERVICES AND DEVELOPMENT** | | | | |
| 1 | CareerBuilder | 20,834 | 19,705 | 5.7 |
| 2 | Monster | 13,745 | 12,363 | 11.2 |
| 3 | Yahoo HotJobs | 9,548 | 5,849 | 63.2 |
| 4 | Job.com | 3,392 | 2,519 | 34.7 |
| 5 | College Board Property | 2,207 | 2,426 | -9.0 |
| **ENTERTAINMENT - MUSIC** | | | | |
| 1 | Yahoo Music | 23,379 | 20,818 | 12.3 |
| 2 | AOL Music | 16,452 | 18,641 | -11.7 |
| 3 | MySpace Music | 15,744 | NA | NA |
| 4 | ARTISTdirect Network | 13,842 | 10,549 | 31.2 |
| 5 | MTV Networks Music | 13,053 | NA | NA |

# TOP 5 SITES IN 16 MAJOR CATEGORIES

Source: comScore Media Metrix. Unique visitors in thousands for more than 175 million total visits in February 2007. Rankings continue through Page 21. More extensive notes about visitors are on Page 10.

| RANK | SITE | UNIQUE VISITORS FEB. 2007 | UNIQUE VISITORS FEB. 2006 | % CHANGE |
|---|---|---|---|---|
| **GAMBLING** | | | | |
| 1 | PCH.com | 8,300 | 5,116 | 62.2 |
| 2 | Eprize.net | 3,650 | 3,116 | 17.1 |
| 3 | California Lottery | 1,835 | 1,306 | 40.5 |
| 4 | PokerStars | 1,651 | NA | NA |
| 5 | iWin.com | 1,632 | NA | NA |
| **GAMES** | | | | |
| 1 | Yahoo Games | 19,506 | 18,319 | 6.5 |
| 2 | EA Online | 12,837 | 9,768 | 31.4 |
| 3 | MSN Games | 10,347 | 10,468 | -1.2 |
| 4 | Atom Entertainment | 9,817 | NA | NA |
| 5 | IGN Entertainment - Games | 7,374 | NA | NA |
| **CLASSIFIEDS** | | | | |
| 1 | Craigslist.org | 15,991 | 8,524 | 87.6 |
| 2 | Dominion Enterprises | 6,818 | 7,615 | -10.5 |
| 3 | AutoTrader | 6,067 | 4,743 | 27.9 |
| 4 | Cars.com | 3,814 | 3,283 | 16.2 |
| 5 | Apartments.com | 2,543 | 1,767 | 43.9 |
| **PERSONALS** | | | | |
| 1 | Yahoo Personals | 4,941 | 5,325 | -7.2 |
| 2 | Match.com sites | 3,919 | 3,895 | 0.6 |
| 3 | True.com | 3,812 | 1,947 | 95.8 |
| 4 | Singlesnet.com | 3,114 | 568 | 448.5 |
| 5 | Spark Networks | 2,768 | 2,336 | 18.5 |

| RANK | SITE | UNIQUE VISITORS FEB. 2007 | UNIQUE VISITORS FEB. 2006 | % CHANGE |
|---|---|---|---|---|
| **ENTERTAINMENT - MOVIES** | | | | |
| 1 | IMDB.com | 18,980 | 15,092 | 25.8 |
| 2 | Yahoo Movies | 14,526 | 12,138 | 19.7 |
| 3 | MSN Movies | 11,869 | 12,001 | -1.1 |
| 4 | Moviefone | 11,452 | 11,722 | -2.3 |
| 5 | Hollywood Media Corp. | 8,948 | 7,668 | 16.7 |
| **BLOGS** | | | | |
| 1 | Blogger | 22,281 | NA | NA |
| 2 | Six Apart sites | 10,477 | 8,699 | 20.4 |
| 3 | Windows Live Spaces | 8,320 | 7,925 | 5.0 |
| 4 | Yahoo 360° | 4,413 | 3,262 | 35.3 |
| 5 | WordPress.com | 4,388 | 230 | 1808.5 |
| **SPORTS** | | | | |
| 1 | ESPN | 15,207 | 17,806 | -14.6 |
| 2 | Fox Sports on MSN | 14,704 | 15,852 | -7.2 |
| 3 | Yahoo Sports | 13,109 | 13,026 | 0.6 |
| 4 | AOL Sports | 9,002 | 11,695 | -23.0 |
| 5 | NFL Internet Group | 8,891 | 8,393 | 5.9 |
| **TRAVEL** | | | | |
| 1 | Expedia | 25,060 | 25,392 | -1.3 |
| 2 | Travelport | 19,160 | NA | NA |
| 3 | Travelocity | 11,492 | 12,246 | -6.2 |
| 4 | Southwest Airlines Co. | 9,447 | 9,902 | -4.6 |
| 5 | Yahoo Travel | 9,024 | 8,597 | 5.0 |

# TOP 5 SITES IN 16 MAJOR CATEGORIES

Source: comScore Media Metrix. Unique visitors in thousands for more than 175 million total visits in February 2007. Rankings continue through Page 21. More extensive notes about visitors are on Page 10.

| RANK | SITE | UNIQUE VISITORS FEB. 2007 | FEB. 2006 | % CHANGE |
|---|---|---|---|---|
| **HEALTH** | | | | |
| 1 | WebMD Health | 16,466 | 13,093 | 25.8 |
| 2 | NIH.gov | 9,321 | 8,381 | 11.2 |
| 3 | MSN Health | 7,777 | 6,203 | 25.4 |
| 4 | Everyday Health | 6,860 | 4,060 | 69.0 |
| 5 | About.com Health | 5,540 | 4,680 | 18.4 |
| **RETAIL** | | | | |
| 1 | eBay | 79,559 | 66,613 | 19.4 |
| 2 | Amazon sites | 48,905 | 42,660 | 14.6 |
| 3 | Apple | 36,767 | 24,277 | 51.5 |
| 4 | Wal-Mart | 25,125 | 20,999 | 19.7 |
| 5 | Target Corp. | 23,038 | 19,876 | 15.9 |
| **NEWS/INFORMATION** | | | | |
| 1 | New York Times Digital | 39,769 | 34,841 | 14.1 |
| 2 | The Weather Channel | 37,374 | 27,887 | 34.0 |
| 3 | Yahoo News | 36,235 | 26,437 | 37.1 |
| 4 | MSNBC | 25,783 | 26,484 | −2.6 |
| 5 | CNN | 22,915 | 20,546 | 11.5 |
| **SOCIAL NETWORKING** | | | | |
| 1 | MySpace.com | 64,443 | 37,349 | 72.5 |
| 2 | Blogger | 22,281 | NA | NA |
| 3 | Facebook.com | 16,737 | 10,513 | 59.2 |
| 4 | Yahoo Geocities | 16,563 | 19,434 | −14.8 |
| 5 | Classmates.com sites | 14,465 | 13,756 | 5.2 |

# BLOGS

## BLOG USERS

Data from Pew Internet & American Life Project, July 2006, via eMarketer for November 2005 through April 2006 for U.S. adult internet users.

| ACTIVITY | MILLIONS OF USERS |
|---|---|
| Internet users | 147 |
| Read blogs | 57 |
| Keep a blog | 12 |

## U.S. INTERNET USERS WHO KEEP BLOGS

Data from USC Annenberg School Center for the Digital Future, November 2006, via eMarketer for November 2005 through April 2006 for U.S. internet users who keep a blog, 2003 & 2006.

| YEAR | % OF RESPONDENTS |
|---|---|
| 2003 | 3.2% |
| 2006 | 7.4 |

## BLOG READERS

Data from the Radio Television News Directors Foundation (RTNDF) commissioned by The Ford Foundation, October 2006 for 1,106 respondents, via eMarketer. Shows the frequency with which U.S. adults read blogs, April-May 2006.

| FREQUENCY | % OF RESPONDENTS |
|---|---|
| Every day | 3.1% |
| Several times a week | 4.0 |
| About once a week | 4.5 |
| Seldom | 20.1 |
| Never | 52.3 |
| Don't know what blogs are | 16.0 |

## BLOG AD SPENDING

Data from PQ Media and Marketing Vox, April 2006, via eMarketer for the U.S. only in millions.

| 2005 | 2006 | 2010 |
|---|---|---|
| $16.6 | $36.2 | $300.4 |

## CALCULATING THE RETURN ON INVESTMENT OF BLOGGING

Data from a case study estimating the ROI of General Motors' FastLane blog in Forrester Research's Jan. 27, 2007, report, "Calculating The ROI Of Blogging: A Case Study." The model is adjusted for risk and other factors such as declining press coverage. Forrester offers underlying data in spreadsheets online. A complimentary copy of the full case study is available at: http://www.forrester.com/roiofblogging

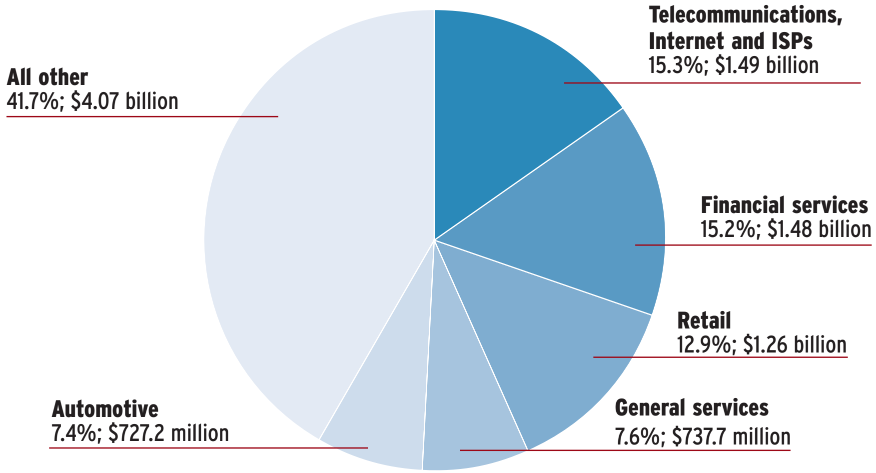
| | 2005 | 2006 | 2007 |
|---|---|---|---|
| **BENEFITS:** Consumer insight | $180,000 | $180,000 | $180,000 |
| Blog visibility | 6,844 | 6,844 | 6,844 |
| Press | 380,990 | 214,900 | 169,760 |
| Word of mouth | 10,540 | 8,727 | 6,970 |
| **Total benefits** | 578,374 | 410,470 | 363,574 |
| **COSTS:** Initial | 35,521 | - | - |
| Recurring | 255,675 | 255,675 | 255,675 |
| **Total costs** | 291,196 | 255,675 | 255,675 |
| **RETURN ON INVESTMENT** | 99% | 61% | → |

| Scenario | Probability | ROI |
|---|---|---|
| Most likely | 65% | 42% |
| Best case | 5% | 79% |
| Worst case | 30% | 26% |
| Risk-adjusted ROI | | 39% |

# ONLINE DISPLAY ADVERTISING

## $9.77 BILLION INTERNET DISPLAY ADS BY CATEGORY

Source: TNS Media Intelligence. Dollars are in millions for calendar 2006 and represent only display advertising excluding search and broadband video on more than 2,800 sites. See note on Page 27 for information on the categories, which are aggregated by Ad Age.




## DISPLAY AD GROWTH

Source: TNS Media Intelligence. Dollars are in millions, and exclude search and broadband video ads.

| YEAR | U.S. SPENDING | % CHG |
|---|---|---|
| 2006 | $9,769.8 | 17.5% |
| 2005 | 8,318.0 | 13.2 |
| 2004 | 7,342.9 | 20.8 |
| 2003 | 6,080.1 | 18.0 |
| 2002 | 5,151.5 | -11.1 |

# TOP 25 U.S. INTERNET ADVERTISERS

Data from TNS Media Intelligence on more than 2,800 sites. Dollars are in millions for calendar 2006 and represent only display advertising; excludes search and broadband video. Percent change computed versus 2005 data, not shown.

| RANK | MARKETER | U.S. AD SPENDING | % CHANGE |
|---|---|---|---|
| 1 | **Vonage Holdings Corp.** | $185.7 | -32.7 |
| 2 | **AT&T** | 166.9 | 196.9 |
| 3 | **Dell** | 137.8 | -13.3 |
| 4 | **Walt Disney Co.** | 133.2 | 46.7 |
| 5 | **General Motors Corp.** | 129.7 | 16.0 |
| 6 | **Experian Group** | 128.3 | -29.5 |
| 7 | **Verizon Communications** | 123.6 | -14.2 |
| 8 | **Apollo Group** | 123.6 | 38.7 |
| 9 | **IAC/InterActiveCorp** | 123.0 | 37.2 |
| 10 | **TD Ameritrade Holding Corp.** | 119.8 | 30.5 |
| 11 | **United Online** | 115.9 | -23.2 |
| 12 | **Netflix** | 115.2 | -15.8 |
| 13 | **Hewlett-Packard Co.** | 111.4 | 3.1 |
| 14 | **E-Trade Financial Corp.** | 106.9 | 49.3 |
| 15 | **Scottrade** | 105.0 | 23.3 |
| 16 | **Monster Worldwide** | 102.6 | 74.3 |
| 17 | **Ford Motor Co.** | 99.1 | 80.1 |
| 18 | **FMR Corp.** (Fidelity Investments) | 97.4 | 236.8 |
| 19 | **Time Warner** | 90.6 | -46.0 |
| 20 | **Nextag** | 90.1 | 198.6 |
| 21 | **Dollar Thrifty Automotive Group** | 88.0 | 176.4 |
| 22 | **Microsoft Corp.** | 81.7 | -20.7 |
| 23 | **American Express Co.** | 80.8 | 180.0 |
| 24 | **Sony Corp.** | 73.6 | 65.8 |
| 25 | **Charles Schwab Corp.** | 72.1 | 12.1 |
| | **Total** | 9,769.8 | 17.5 |

# U.S. INTERNET SPENDING TOTALS BY CATEGORY

Data from TNS Media Intelligence on more than 2,800 sites. Dollars are in millions for calendar 2006 and represent only display advertising; excludes search and broadband video. Percent change computed versus 2005 data, not shown. *See note on facing page for information on the categories.

| RANK | CATEGORY* | U.S. INTERNET AD SPENDING | % CHANGE |
|---|---|---|---|
| 1 | Telecommunications, internet services and ISP | $1,494.7 | −0.8 |
| 2 | Financial services | 1,481.9 | 43.8 |
| 3 | Retail | 1,257.5 | 14.2 |
| 4 | General services | 737.7 | 3.6 |
| 5 | Automotive | 727.2 | 71.4 |
| 6 | Media | 716.4 | 31.7 |
| 7 | Computers, software | 456.0 | 29.0 |
| 8 | Airlines, hotels, car rental, travel | 452.2 | −11.8 |
| 9 | Medicine & remedies | 379.3 | −3.3 |
| 10 | Education | 273.7 | 8.8 |
| 11 | Movies, recorded video & music | 189.7 | 60.2 |
| 12 | Toys & games | 159.9 | 29.3 |
| 13 | Government, politics, religion | 155.6 | −9.3 |
| 14 | Insurance | 151.2 | −6.7 |
| 15 | Food, beverages & candy | 133.7 | 23.2 |
| 16 | Real estate | 131.7 | 42.0 |
| 17 | Personal care | 105.5 | 32.6 |
| 18 | Home furnishings, appliances & electronics | 84.6 | 2.4 |
| 19 | Beer, wine & liquor | 61.0 | 38.7 |
| 20 | Restaurants | 48.5 | 7.4 |
| 21 | Apparel | 39.4 | 42.7 |
| 22 | Home supplies & cleaners | 29.8 | 122.8 |
| 23 | Hardware & home building supplies | 26.3 | 74.9 |
| 24 | Pet food & pet care | 21.3 | −44.9 |
| 25 | Sporting goods | 13.5 | 41.0 |
| | Total all categories | 9,769.8 | 17.5 |



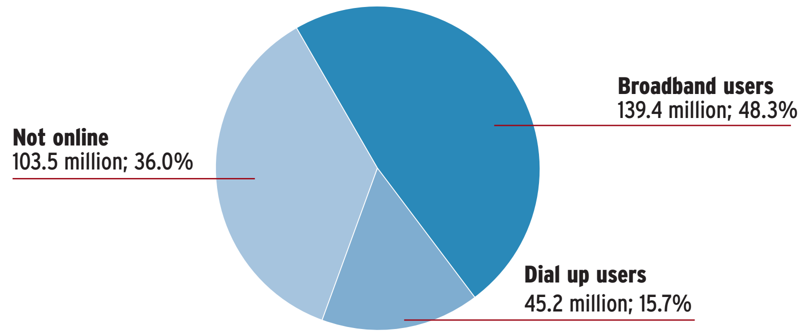
# ABOUT THE CATEGORIES

Categories are aggregated by Ad Age from TNS classifications as follows (not comprehensively): **Automotive** includes manufacturers and dealerships; **Retail** includes discount department & variety stores, department stores, retail, shopping centers & catalog showrooms; **Telecom, internet services and ISP** includes telephone companies (wireless, local and long distance), internet service providers, web designers, communications networks, telephone equipment, and offline internet support; **Medicines & proprietary remedies:** Pharmaceutical houses, medicines & proprietary remedies, fitness, eyeglasses, medical equipment; **Financial services** includes banks and credit cards; **Food, beverages & confectionery:** Beverages, confectionery & snacks, dairy, produce, meat & bakery goods, prepared foods, ingredients, mixes & seasonings; **General Services:** Apparel services, business services, beauty shops, doctors, nurses, chiropractors, dentists, hospitals, clinics & medical centers, legal services, rental services, dating services, spectator sporting events, exterminators, electric & water companies; **Personal care:** Cosmetics & beauty aids, personal hygiene, hair products, toiletries, hygienic goods & skin care; **Movies, recorded video and music** includes DVDs; **Direct response advertising** includes direct response advertising in all classifications; **Airlines, hotel, car rental and travel** includes cruise ship travel; **Apparel:** Ready-to-wear, underclothing & hosiery, jewelry, accessories, footwear; **Home furnishings, appliances & electronics:** household furnishings & accessories, building materials, equipment & fixtures, appliances, electronics; **Home supplies and cleaners:** Household soaps, cleansers & polishes, laundry soaps, foils, wraps, paper products; **Miscellaneous:** Aviation (excluding freight), employment recruitment, agriculture, lawn and garden, industrial, luggage, cameras, film.

# CONSUMER INTERNET USAGE

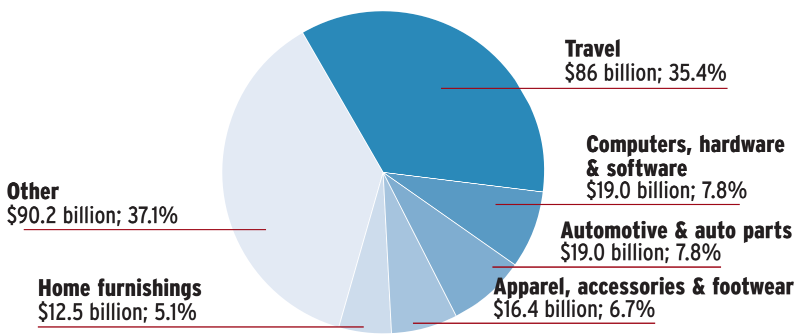
## INTERNET PENETRATION BY ACCESS TECHNOLOGY

Data from eMarketer, using the Federal Communications Commission as its benchmark for broadband households for 2007. Based on 288.5 million people in the U.S. ages 3-plus in 2007. See chart, Page 30.




## $243.1 BILLION IN U.S. ONLINE RETAIL SALES IN 2007

Data from Forrester Research's U.S. eCommerce Report showing projections for 2006 and 2007. All figures are in billions of U.S. dollars. See related chart on Page 34.



# INTERNET USERS IN THE U.S. BY ACCESS TECHNOLOGY

Data from eMarketer (March 2007) using the following sources and methodologies: [1]historical data from the International Telecommunication Union (ITU) as a baseline; penetration figures are based on population estimates from the U.S. Census Bureau's International Data Base (IDB); an internet user is defined as someone who uses the internet at least once per month; [2]Broadband is defined as an internet connection of 200 kbps in at least one direction and includes ADSL, cable, satellite, fixed wireless, fiber, powerline, WiMax and emerging technologies used at home. Figures are rounded.

| USERS, HOUSEHOLDS, SUBSCRIBERS IN MILLIONS | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **Internet users[1]** | 175.4 | 181.9 | 188.1 | 193.9 | 200.1 | 206.2 |
| percent change | | 3.7% | 3.4% | 3.1% | 3.2% | 3.0% |
| **Population ages 3+** | 283.4 | 286.0 | 288.5 | 291.1 | 293.8 | 296.3 |
| percent change | | 0.9% | 0.9% | 0.9% | 0.9% | 0.8% |
| **Internet users as % of population ages 3+** | 61.9% | 63.6% | 65.2% | 66.6% | 68.1% | 69.6% |
| +/- change | | 1.7 | 1.6 | 1.4 | 1.5 | 1.5 |
| **Broadband users** | 108.1 | 124.3 | 139.4 | 153.6 | 165.1 | 173.5 |
| percent change | | 15.0% | 12.1% | 10.2% | 7.5% | 5.1% |
| **Dial-up users** | 67.3 | 55.8 | 45.2 | 34.9 | 27.2 | 22.5 |
| percent change | | −17.1% | −19.0% | −22.8% | −22.1% | −17.3% |
| **Online households [2]** | 72.1 | 74.5 | 78.6 | 82.9 | 87.8 | 92.3 |
| percent change | | 3.3% | 5.5% | 5.5% | 5.9% | 5.1% |
| **Broadband households [2]** | 43.9 | 54.6 | 65.0 | 74.1 | 81.1 | 86.2 |
| percent change | | 24.4% | 19.0% | 14.0% | 9.4% | 6.3% |
| **Dial-up households [2]** | 28.2 | 19.9 | 13.6 | 8.8 | 6.7 | 6.1 |
| percent change | | −29.4% | −31.7% | −35.3% | −23.9% | −9.0% |
| **Online households as % of all U.S. households [2]** | 61.7% | 62.6% | 64.9% | 67.2% | 70.0% | 72.3% |
| +/- change | | 0.9 | 2.2 | 2.4 | 2.7 | 2.4 |
| **Broadband as % of all online households [2]** | 60.9% | 73.3% | 82.7% | 89.4% | 92.4% | 93.4% |
| +/- change | | 12.4 | 9.4 | 6.7 | 3.0 | 1.0 |
| **ADSL broadband households** | 17.4 | 23 | 28.1 | 31.8 | 34.5 | 36.2 |
| percent change | | 32.2% | 22.2% | 13.2% | 8.5% | 4.9% |
| **Cable broadband households** | 25.6 | 29.9 | 34.1 | 37.9 | 40.9 | 43.1 |
| percent change | | 16.8% | 14.0% | 11.1% | 7.9% | 5.4% |
| **Other broadband households** | 0.9 | 1.7 | 2.8 | 4.4 | 5.7 | 6.9 |
| percent change | | 88.9% | 64.7% | 57.1% | 29.5% | 21.1% |
| **Total U.S. households** | 116.8 | 119 | 121.2 | 123.3 | 125.5 | 127.6 |
| percent change | | 1.9% | 1.8% | 1.7% | 1.8% | 1.7% |

# TOP ONLINE ACTIVITIES OF INTERNET USERS

Data from Mediamark Research Inc. (MRI) for U.S. adult internet users only, showing percent of respondents, October 2006, via eMarketer. *Includes traded stocks, bonds or mutual funds.

| RANK | ACTIVITY | INTERNET USERS | % CHG VS. 2005 | % CHG VS 2002 |
|---|---|---|---|---|
| 1 | Used e-mail | 70.5% | 1.6% | 9.7% |
| 2 | Obtained the latest news/current events | 40.2 | -4.6 | 12.3 |
| 3 | Made a purchase online for personal use | 34.2 | 5.7 | 57.7 |
| 4 | Paid bills online | 30.7 | NA | NA |
| 5 | Used instant messenger | 26.8 | 20.6 | NA |
| 6 | Obtained financial information | 24.8 | -5.2 | 21.4 |
| 7 | Obtained sports news/information | 23.8 | -7.0 | 15.1 |
| 8 | Played games online | 22.4 | -1.3 | 22.4 |
| 9 | Made personal or business travel plans | 19.8 | -0.5 | 24.9 |
| 10 | Obtained medical information | 17.4 | -2.5 | 26.2 |
| 11 | Downloaded music | 15.7 | 23.3 | NA |
| 12 | Visited a TV network's or TV show's website | 14.1 | -1.7 | 35.1 |
| 13 | Tracked investments* | 13.2 | NA | NA |
| 14 | Obtained information about real estate | 12.3 | -8.3 | 36.6 |
| 15 | Looked for employment | 12.1 | -7.7 | 11.3 |
| 16 | Watched video online | 11.4 | 123.7 | NA |
| 17 | Listened to radio on the internet | 10.9 | 3.8 | 25.6 |
| 18 | Made a purchase for business use | 10.7 | 2.4 | 51.5 |
| 19 | Obtained information for a new car purchase | 10.0 | -12.1 | -2.7 |
| 20 | Visited blogs | 6.7 | 163.9 | NA |
| 21 | Made a phone call online | 2.6 | 197.7 | NA |
| 22 | Used online gambling site | 2.2 | NA | NA |

# SIMULTANEOUS ACTIVITIES WHILE ONLINE

Data from BIGresearch, December 2006, for 15,167 U.S. adults, via eMarketer.

| RANK | ACTIVITY | REGULARLY | OCCASIONALLY | NEVER |
|---|---|---|---|---|
| 1 | Watching TV | 39.5% | 30.4% | 30.1% |
| 2 | Reading mail | 24.5 | 28.2 | 47.4 |
| 3 | Listening to the radio | 22.7 | 38.2 | 39.1 |
| 4 | Reading newspaper | 12.3 | 21.1 | 66.6 |
| 5 | Reading magazine | 9.2 | 26.4 | 64.5 |
| | Other activities | 25.7 | 45.5 | 28.9 |

# EFFECT OF TECHNOLOGY ON THE SOCIAL LIVES OF U.S. ADULT INTERNET USERS

Data from Henley Center HeadlightVision for Yahoo and OMD, September 2006, via eMarketer. Table shows percent of respondents for July-August 2006.

| EFFECT | RESPONDENTS BY AGE 18 TO 34 | 35 PLUS |
|---|---|---|
| Wouldn't be able to stay in touch with friends and family without technology | 55% | 36% |
| Enjoy shopping online | 55 | 44 |
| Have friends who live in different cities and countries because of the internet | 46 | 32 |
| Give advice about new technology to others | 40 | 22 |
| Technology has provided me with a platform to overcome my shyness | 36 | 17 |
| Social life would suffer without technology | 34 | 18 |

# U.S. ONLINE RETAIL SALES

Data from Forrester Research. Table shows U.S. eCommerce data for 2006 and 2007. All figures are projected in billions of U.S. dollars. See related pie chart on Page 28.

| CATEGORY | U.S. ONLINE RETAIL SALES PROJECTIONS (IN BILLIONS) PROJECTED 2007 | PROJECTED 2006 | % CHG |
|---|---|---|---|
| Apparel, accessories & footwear | $16.4 | $13.8 | 18.8% |
| Appliances & tools | 7.0 | 5.9 | 18.6 |
| Autos & auto parts | 19.0 | 15.9 | 19.5 |
| Baby products | 1.9 | 1.6 | 18.8 |
| Books | 5.9 | 5.3 | 11.3 |
| Computer hardware & software | 19.0 | 16.8 | 13.1 |
| Computer peripherals | 1.5 | 1.4 | 7.1 |
| Consumer electronics | 11.9 | 9.8 | 21.4 |
| Cosmetics & fragrances | 1.0 | 0.8 | 25.0 |
| Flowers & cards | 3.1 | 2.6 | 19.2 |
| Food, beverages & groceries | 7.2 | 6.2 | 16.1 |
| Gift cards & gift certificates | 7.2 | 5.8 | 24.1 |
| Home furnishings | 12.5 | 10.2 | 22.5 |
| Jewelry | 4.8 | 4.0 | 20.0 |
| Movie tickets | 1.0 | 0.8 | 25.0 |
| Music & videos | 9.9 | 8.2 | 20.7 |
| Office supplies | 6.3 | 5.3 | 18.9 |
| OTC medicines & personal care | 1.6 | 1.3 | 23.1 |
| Event tickets | 5.4 | 4.3 | 25.6 |
| Pet supplies | 0.7 | 0.5 | 40.0 |
| Sporting goods & apparel | 6.8 | 5.8 | 17.2 |
| Toys & video games | 7.0 | 5.8 | 20.7 |
| Travel | 86.0 | 73.4 | 17.2 |
| Total | 243.1 | 205.5 | 18.3 |

# TOP CATEGORIES BY TIME SPENT ONLINE

Data from comScore Media Metrix. Unique visitors in thousands for February 2007.

| RANK | CATEGORY | DAILY MINUTES PER USER | SHARE OF ONLINE DAY | UNIQUE VISITS (000) |
|---|---|---|---|---|
| 1 | Portals | 18.5 | 33.5% | 160,080 |
| 2 | E-mail | 7.8 | 14.1 | 125,834 |
| 3 | Instant messengers | 5.4 | 9.8 | 74,064 |
| 4 | Retail | 4.2 | 7.6 | 136,863 |
| 5 | Entertainment | 3.0 | 5.4 | 129,441 |
| 6 | Games | 2.5 | 4.6 | 71,390 |
| 7 | Online gaming | 2.2 | 4.0 | 56,532 |
| 8 | Community | 1.7 | 3.1 | 110,141 |
| 9 | Directories/resources | 1.6 | 2.9 | 121,896 |
| 10 | Discussion/chat | 1.6 | 2.8 | 46,043 |

# VIDEO ONLINE

## TOP VIDEO PROPERTIES

Data from comScore Video Metrix for January 2007 for all persons at home, work, college. Unique Streamers are in thousands.

| PROPERTY | STREAMERS |
|---|---|
| **Google sites** | 54,732 |
| **YouTube.com** (part of Google) | 48,666 |
| **Fox Interactive Media** | 41,633 |
| **Yahoo sites** | 35,872 |
| **Time Warner network** | 24,384 |
| **Viacom Digital** | 18,921 |
| **Microsoft sites** | 18,127 |
| **Disney Online** | 12,634 |
| **Apple** | 7,695 |
| **ESPN** | 6,356 |
| **NBC Universal** | 5,724 |
| **CBS Corp.** | 5,344 |
| **ABC.com** | 5,268 |
| **Total streaming audience** | 122,872 |

**USER-GENERATED VIDEO**

**Screen Digest estimates that 47% of online video content was user generated in 2006, and projects an increase to 55% by 2010, according to eMarketer.**

## TYPE OF VIDEO VIEWED

Data from eMarketer showing percent of 1,463 U.S. respondents asked the types of video content viewed for February-March 2006.

| VIDEO TYPE | RESPONDENTS |
|---|---|
| **News stories** | 40.0% |
| **Movie previews** | 30.0 |
| **Weather** | 30.0 |
| **Jokes/bloopers** | 28.0 |
| **Music videos** | 27.0 |
| **TV show clips/excerpts** | 17.0 |
| **Sports content** | 16.0 |
| **Video game content** | 13.0 |
| **Cartoons** | 11.0 |
| **TV previews** | 11.0 |
| **Short films** | 10.0 |
| **Educational content** | 9.0 |
| **TV shows** | 8.0 |
| **Business/work-related content** | 7.0 |
| **User-generated content** | 6.0 |
| **Full-length movies** | 5.0 |
| **Other** | 4.0 |
| **None of the above** | 14.0 |

## U.S. ONLINE VIDEO AD DOLLARS AND VIEWERS

Data from eMarketer, which benchmarks its ad spending projections against Interactive Advertising Bureau (IAB)/PricewaterhouseCoopers (PwC), for which the last full year measured was 2005. Video viewer defined as an one who downloads or streams video (content or advertising) at least monthly.

| | U.S. MARKETING SPENDING IN MILLIONS | | | | | | |
|---|---|---|---|---|---|---|---|
| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
| **Online video ad spending** | $135 | $225 | $410 | $775 | $1,300 | $2,000 | $2,900 |
| **Video ad spending growth** | 58.8% | 66.7% | 71.1% | 68.8% | 69.2% | 50.0% | 42.4% |
| **U.S. viewers (millions)** | 69.6 | 89.4 | 107.7 | 123.4 | 137.2 | 149.0 | 157.0 |

# SEARCH

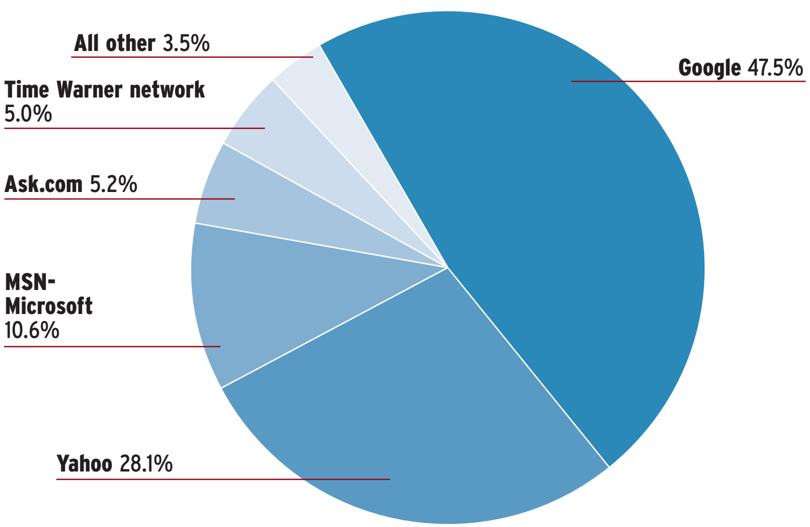
## SHARE OF 6.9 BILLION ONLINE SEARCHES

Source: comScore qSearch, a division of comScore Networks. Point change based on share of 6.9 billion searches in January 2006. The 2007 figure represents a 26% overall increase in searches.

| RANK | SITE | PERCENT OF SEARCHES JAN. 2007 | JAN. 2006 | +/- CHG |
|---|---|---|---|---|
| 1 | Google sites | 47.5% | 41.4% | 6.1 |
| 2 | Yahoo sites | 28.1 | 28.7 | -0.6 |
| 3 | Microsoft sites | 10.6 | 13.7 | -3.1 |
| 4 | Ask network | 5.2 | 5.6 | -0.4 |
| 5 | Time Warner network | 5.0 | NA | NA |
| | All other | 3.5 | NA | NA |

## SEARCH ENGINE MARKET SHARE

Source: comScore qSearch, a division of comScore Networks.




## TOP 25 U.S. SEARCH ENGINES

Data from Hitwise—which collects usage data through partnerships with ISPs and opt-in panels monitoring more than 10 million users in the U.S. and more than 25 million worldwide—for the week ending March 31, 2007.

| RANK | NAME | DOMAIN | MARKET SHARE |
|---|---|---|---|
| 1 | Google | www.google.com | 51.83% |
| 2 | Yahoo Search | search.yahoo.com | 15.94 |
| 3 | MSN Search | search.msn.com | 9.13 |
| 4 | Google Image Search | images.google.com | 6.02 |
| 5 | Ask.com | www.ask.com | 2.15 |
| 6 | AOL Search | www.aolsearch.com | 1.73 |
| 7 | Yahoo Image Search | images.search.yahoo.com | 1.51 |
| 8 | Windows Live Search | www.live.com | 1.05 |
| 9 | My Web Search | www.mywebsearch.com | 1.05 |
| 10 | Dogpile | www.dogpile.com | 0.58 |
| 11 | Lycos Search | search.lycos.com | 0.47 |
| 12 | MSN Video | video.msn.com | 0.34 |
| 13 | Mamma.com | www.mamma.com | 0.33 |
| 14 | Yahoo Video | video.search.yahoo.com | 0.32 |
| 15 | Ask - Images | images.ask.com | 0.28 |
| 16 | SurfSanity | www.surfsanity.com | 0.27 |
| 17 | AltaVista | www.altavista.com | 0.25 |
| 18 | Google Book Search | books.google.com | 0.24 |
| 19 | Google Scholar | scholar.google.com | 0.22 |
| 20 | Ask.com UK | www.uk.ask.com | 0.19 |
| 21 | InfoSpace | www.infospace.com | 0.18 |
| 22 | HP Search | search.hp.netscape.com | 0.16 |
| 23 | Yahoo Directory | dir.yahoo.com | 0.16 |
| 24 | AOL Video | video.aol.com | 0.16 |
| 25 | Search.com | www.search.com | 0.15 |

## SEARCHES PER SEARCHER

Source: comScore qSearch, a division of comScore Networks.

| RANK | SITE | MONTHY SEARCHES PER SEARCHER JAN. 2007 | JAN. 2006 | +/- CHG |
|---|---|---|---|---|
| 1 | Google sites | 29.3 | 27.1 | 2.2 |
| 2 | Yahoo sites | 22.3 | 21.4 | 0.9 |
| 3 | Microsoft sites | 13.4 | 15.5 | -2.2 |
| 4 | Ask network | 10.1 | 10.4 | -0.3 |
| 5 | Time Warner network | 11.3 | NA | NA |

# TOTAL U.S. INTERNET AD REVENUE MINUS TRAFFIC ACQUISITION COSTS FOR GOOGLE & YAHOO

Data from an eMarketer February 2007 report based on reported revenue through 2006 and eMarketer projections for Google and Yahoo for 2007. Traffic acquisition costs (revenues shared with affiliate sites on network) are commonly abbreviated as "TAC." Gross revenue minus TAC is net revenue.

| | GOOGLE | YAHOO |
|---|---|---|
| **NET REVENUE (IN MILLIONS)** | | |
| 2005 | $2,410 | $2,439 |
| 2006 | 4,095 | 2,996 |
| 2007 | 6,265 | 3,536 |
| **GROWTH VERSUS PRIOR YEAR** | | |
| 2005 | 90.7% | 37.3% |
| 2006 | 69.9 | 22.9 |
| 2007 | 53.0 | 18.0 |

| | GOOGLE | YAHOO | GOOGLE & YAHOO |
|---|---|---|---|
| **SHARE OF INTERNET AD SPENDING** | | | |
| 2005 | 19.2% | 19.4% | 38.7 |
| 2006 | 25.0 | 18.3 | 43.2 |
| 2007 | 32.1 | 18.1 | 50.3 |
| **SHARE OF PAID SEARCH AD SPENDING** | | | |
| 2005 | 46.9% | 19.0% | 65.8% |
| 2006 | 58.7 | 15.0 | 73.8 |
| 2007 | 75.6 | 15.8 | 91.4 |

# U.S. SEARCH MARKETING SPENDING TO 2010

Data from Forrester Research's "U.S. Online Marketing Forecast," May 2, 2005. Paid inclusion is the amount spent on submitting pages to paid directories (like Froogle, Yahoo Shopping) for cataloging. Paid search is the amount spent on paid search media on search engines. Contextual listings is the amount spent buying contextual ads across content sites in different search engine or aggregator networks. Agency fees is the amount of money paid to interactive agencies or search marketing vendors for help managing the above three buys.

| | DIGITAL MARKETING SPENDING IN MILLIONS OF DOLLARS | | | | |
|---|---|---|---|---|---|
| CHANNEL | 2006 | 2007 | 2008 | 2009 | 2010 |
| Paid inclusion | $321 | $366 | $408 | $447 | $485 |
| Agency fees | 691 | 813 | 946 | 1,092 | 1,258 |
| Contextual listings | 1,181 | 1,426 | 1,665 | 1,881 | 2,089 |
| Paid search | 4,873 | 5,682 | 6,444 | 7,113 | 7,740 |
| Total | 7,067 | 8,287 | 9,463 | 10,533 | 11,571 |

# GOOGLE'S ZEITGEIST

Data from Google. Google Zeitgeist for the week ending March 31, 2007, shows the top 10 gaining search queries published by Google.

| RANK | QUERY |
|---|---|
| 1 | blades of glory |
| 2 | ron jeremy |
| 3 | hayden panettiere |
| 4 | transformers |
| 5 | gwen stefani |
| 6 | cesar chavez |
| 7 | xbox 360 elite |
| 8 | happy feet |
| 9 | discovery channel |
| 10 | allegra versace |

# WORDTRACKER

Data from Wordtracker's Keywords report, April 3, 2007, for the previous 48 hours. The hits count is the number of sightings of a keyword in a database of search terms from queries on metacrawlers. Adult terms are omitted.

| RANK | QUERY |
|---|---|
| 1 | myspace |
| 2 | google |
| 3 | anna nicole smith |
| 4 | yahoo |
| 5 | ebay |
| 6 | akon |
| 7 | myspace.com |
| 8 | antonella barba |
| 9 | games play |
| 10 | mapquest |

# HITWISE' SHOPPING TERMS

Data from Hitwise for four weeks ending March 10, 2007. Hitwise collects usage data through partnerships with ISPs and opt-in panels monitoring more than 10 million users in the U.S. and more than 25 million worldwide. Terms are those that drove traffic to shopping on the web.

| RANK | QUERY |
|---|---|
| 1 | ebay |
| 2 | craigslist |
| 3 | ebay.com |
| 4 | walmart |
| 5 | target |
| 6 | amazon |
| 7 | best buy |
| 8 | amazon.com |
| 9 | www.ebay.com |
| 10 | home depot |
| 11 | lowes |
| 12 | sears |
| 13 | prom dresses |
| 14 | craigslist.com |
| 15 | circuit city |
| 16 | walmart.com |
| 17 | craigs list |
| 18 | ticketmaster |
| 19 | netflix |
| 20 | target.com |
| 21 | costco |
| 22 | qvc |
| 23 | dell |
| 24 | ebay motors |
| 25 | hollister |

# MOBILE

## MOBILE DEVICE USE AND CONTENT CONSUMPTION

Data from M:Metrics. "U.S. Mobile Subscriber Monthly Consumption of Content and Applications" surveyed 30,567 U.S. mobile subscribers. Data based on three-month moving average for period ending Jan. 31, 2007. Projected subscriber totals are in thousands.

| RANK | ACTIVITY | U.S. SUBSCRIBERS | % SHARE | % CHG |
|---|---|---|---|---|
| 1 | Sent text message | 78,325 | 39.2% | 2.5% |
| 2 | Used photo messaging | 29,416 | 14.7 | -0.2 |
| 3 | Browsed news and information | 20,585 | 10.3 | 2.0 |
| 4 | Purchased ringtone | 20,024 | 10.0 | 5.0 |
| 5 | Used personal e-mail | 16,932 | 8.5 | 0.0 |
| 6 | Used mobile instant messenger | 12,643 | 6.3 | 1.2 |
| 7 | Used work e-mail | 10,187 | 5.1 | 0.6 |
| 8 | Downloaded mobile game | 7,288 | 3.6 | -2.2 |
| 9 | Purchased wallpaper or screensaver | 6,903 | 3.5 | 4.3 |

### YAHOO LEADS IN MOBILE USAGE

**14.1 million mobile subscribers accessed e-mail, instant messaging, search, news, directory or weather categories using Yahoo sites, according to M:Metrics, followed by Google at 8.2 million. See note at right.**

## WILLINGNESS TO WATCH ADS

Data from Harris Interactive (August 2006) via eMarketer showing U.S. adult mobile phone users' willingness to watch advertising on their phones in return for free mobile phone applications.

| RATING | % OF RESPONDENTS |
|---|---|
| 7 (very willing) | 10% |
| 6 | 7 |
| 5 | 9 |
| 4 (neutral) | 12 |
| 3 | 6 |
| 2 | 6 |
| 1 (not at all willing) | 51 |

## TOP MOBILE NEWS SITES

Source: M:Metrics. Subscribers in millions are projected from a survey of 30,567 mobile phone users based on a three-month moving average for period ending Jan. 31, 2007. A projected 26,860,374 respondents accessed "News and Information" sites "ever in a month."

| RANK | SITE | SUBSCRIBERS |
|---|---|---|
| 1 | CNN/cnn.com | 3.8 |
| 2 | Yahoo | 3.6 |
| 3 | ESPN Sports News | 2.5 |
| 4 | ABCNews.com | 1.7 |
| 5 | Fox News | 1.6 |
| 6 | MSN Mobile/MSNBC | 1.6 |
| 7 | Fox Sports | 1.2 |
| 8 | USA Today | 1.1 |
| 9 | NFL | 1.0 |
| 10 | AOL Mobile | 0.9 |

## MOBILE PHONE ADVERTISING, REVENUE AND PENETRATION

Data from eMarketer. [1] Includes spending on text-message promotions and ad-supported voice minutes; [2] Includes spending on ad placements around mobile video content, mobile music, mobile TV and mobile social networks. [3] Messaging includes text, multimedia and instant messaging and e-mail; [4] Entertainment includes graphics/logos, games, ringtones, other music, audio, interactive entertainment and communities, adult, TV and film; [5] Information includes productivity, non-voice directory, news, sports, travel, etc. Figures are rounded.

| | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| **AD SPENDING IN MILLIONS** | | | | | |
| Worldwide general mobile ad spending [1] | $1,432 | $2,496 | $4,316 | $6,141 | $9,006 |
| U.S. general mobile ad spending [1] | 410 | 878 | 1,547 | 2,285 | 3,202 |
| Worldwide mobile multimedia ad spending [2] | 109 | 215 | 421 | 749 | 1,295 |
| U.S. mobile multimedia ad spending [2] | 11 | 26 | 55 | 110 | 213 |
| Worldwide total spending | 1,541 | 2,710 | 4,736 | 6,890 | 10,300 |
| U.S. total spending | 421 | 903 | 1,602 | 2,395 | 3,415 |
| **U.S. REVENUE IN BILLIONS** | | | | | |
| Messaging [3] | $3.3 | $5.9 | $10.1 | $12.5 | $15.0 |
| Entertainment [4] | 1.1 | 2.6 | 5.9 | 9.5 | 15.0 |
| Information [5] | 1.0 | 2.0 | 3.8 | 5.1 | 7.5 |
| Total | 5.4 | 10.5 | 19.8 | 27.1 | 37.5 |
| **PENETRATION** | | | | | |
| U.S. mobile phone subscribers (millions) | 228.7 | 249.3 | 269.2 | 285.4 | 296.8 |
| As % of U.S. population | 76.5% | 82.6% | 88.3% | 92.7% | 95.4% |

## U.S. HANDSET MARKET SHARE

Data from Strategy Analytics, prepared by Wireless Device Strategies Service. Units are in millions for calendar 2006. Figures are rounded.

| RANK | VENDOR | UNITS | % CHG | % SHARE |
|---|---|---|---|---|
| 1 | Motorola | 61.3 | 29.5% | 38.5% |
| 2 | LG | 24.2 | -2.4 | 15.2 |
| 3 | Samsung | 24.1 | 3.2 | 15.1 |
| 4 | Nokia | 22.7 | -6.4 | 14.3 |
| 5 | Kyocera | 6.8 | -2.5 | 4.3 |
| 6 | Sanyo | 5.3 | -3.8 | 3.3 |
| 7 | Others | 14.8 | 0.5 | 9.3 |
| | Total | 159.1 | 8.4 | 100.0 |

# E-MAIL

## TOP 10 E-MAIL SERVICE PROVIDERS

Data from JupiterResearch E-mail Marketing Buyers Guide, October 2006. Volume figures (not shown) are self-reported by the ESPs and corroborated by JupiterResearch; volume may not be a precise measure of each company's size.

| RANK | VENDOR | RANK | VENDOR |
|---|---|---|---|
| 1 | Epsilon Interactive/Dart Mail | 6 | e-Dialog |
| 2 | Cheetahmail | 7 | Silverpop |
| 3 | Yesmail | 8 | Acxiom Digital |
| 4 | JL Halsey (E-mail Labs and Lyris) | 9 | Responsys |
| 5 | Exact Target | 10 | Constant Contact |

## U.S. E-MAIL MARKETING SPENDING AND USER DATA

Data on ad spending from Forrester Research's U.S. Online Marketing Forecast 2005 to 2010. Data on e-mail volume including both personal and commercial e-mail (in trillions) and e-mail users–defined as those age 3-plus using e-mail more than once a month–from eMarketer.

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **U.S. E-MAIL MARKETING SPENDING IN MILLIONS** | | | | | | |
| Newsletter sponsorships | $326 | $380 | $425 | $468 | $505 | $541 |
| Outsourced e-mail delivery | 378 | 396 | 414 | 424 | 479 | 542 |
| E-mail list rental | 747 | 746 | 761 | 665 | 622 | 581 |
| Total | 1,451 | 1,522 | 1,600 | 1,557 | 1,606 | 1,664 |
| E-mail % total online mktg | 10% | 9% | 8% | 7% | 7% | 6% |
| **U.S. E-MAIL VOLUME** | | | | | | |
| Volume (in trillions) | 2.09 | 2.37 | 2.69 | NA | NA | NA |
| **U.S. E-MAIL USERS** | | | | | | |
| E-mail users (in millions) | 156.2 | 161.5 | 166.8 | 171.8 | 176.5 | 180.8 |
| Percent change | 3.7% | 3.4% | 3.3% | 3.0% | 2.7% | 2.4% |
| E-mail users as % of internet users | 89.1% | 89.7% | 90.4% | 91.1% | 91.8% | 92.2% |



# GAMES

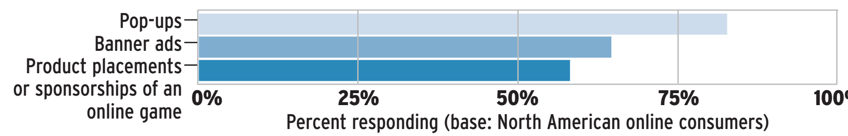
## TOP 10 ONLINE PLAYABLE GAMES

Data from NPD Group for 2006 by minimum number of units sold in thousands (U.S. retail, including online) Games are PC editions only.

| RANK | GAME | UNITS | RANK | GAME | UNITS |
|---|---|---|---|---|---|
| 1 | World Of Warcraft | 808.0 | 6 | Call Of Duty 2 | 204.3 |
| 2 | Star Wars:Empire At War | 355.5 | 7 | Lord of the Rings:Battle For Middle Earth II | 201.5 |
| 3 | MS Age Of Empires III | 305.0 | 8 | The Sims 2:University Expansion Pack | 195.6 |
| 4 | Civilization IV | 274.8 | 9 | Warcraft III Battle Chest | 190.8 |
| 5 | Guild Wars Factions | 225.5 | 10 | Battlefield 2 | 189.8 |

## IN-GAME ADS ARE LESS ANNOYING THAN OTHER INTERACTIVE ADS

Data from Forrester Research's survey of 5,051 North American households about their gaming activities "Why Game Marketing Matters Report." To the question: "For those type of ads that you have seen, please indicate which attitudes best describe your interaction with the ads," those shown below answered, "The ad was annoying."




### ADVERGAMERS USE ADVERTISING

**"18% of those who play advergames say that advertisements help them decide what to buy, compared with only 12% of nongamers," according to Forrester Research's July 2006 "Why Game Marketing Matters" report.**

## PROJECTED U.S. IN-GAME VIDEO AD REVENUE

Data from eMarketer, April 2007. Figures in millions of dollars. [1] Includes static, dynamic and rich media in-game ads; product placement/integration and advergaming and excludes mobile games; [2] Refers to games wholly designed with the intention of promoting a product and excludes mobile games.

| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| U.S. video-game advertising [1] | $346 | $502 | $665 | $829 | $928 | $969 |
| Advergames only [2] | 164 | 207 | 262 | 311 | 339 | 344 |

# SOCIAL NETWORKING

## TOP SOCIAL NETWORKING SITES BY UNIQUE VISITORS

Source: comScore Media Metrix, via eMarketer. Unique visitors in thousands for 173.4 million total visits in September 2006 versus 169.3 million in September 2005. See Page 10 for more extensive notes.

| RANK | SITE | UNIQUE VISITORS (000) SEPT. 06 | SEPT. 05 | % CHG |
|---|---|---|---|---|
| 1 | MySpace.com | 55,849 | 21,640 | 158.0 |
| 2 | Classmates.com sites | 14,926 | 16,190 | -8.0 |
| 3 | Facebook.com | 13,341 | 8,540 | 56.0 |
| 4 | Bolt Media | 10,934 | 5,285 | 107.0 |
| 5 | Windows Live Spaces | 9,844 | 4,564 | 116.0 |
| 6 | Xanga.com | 6,956 | 7,947 | -12.0 |
| 7 | Flickr.com | 6,925 | 2,958 | 134.0 |
| 8 | Yahoo 360° | 5,697 | NA | NA |
| 9 | MyYearbook.com | 3,949 | NA | NA |
| 10 | LiveJournal.com | 3,546 | 5,932 | -40.0 |
| 11 | Hi5.com | 2,740 | 3,242 | -15.0 |
| 12 | Bebo.com | 2,394 | 797 | 200.0 |
| 13 | Tagged.com | 1,638 | 775 | 111.0 |
| 14 | 43Things.com | 1,541 | 365 | 322.0 |
| 15 | Friendster.com | 1,043 | 1,201 | -13.0 |
| 16 | TagWorld.com | 1,025 | 3,318 | -69.0 |
| 17 | Linkedin.com | 786 | 305 | 157.0 |
| 18 | Piczo.com | 773 | 730 | 6.0 |
| 19 | Sconex.com | 590 | 46 | NA |
| 20 | Orkut.com | 294 | 57 | 420.0 |
| 21 | Cyworld | 254 | NA | NA |
| | Total internet audience (U.S.) | 173,428 | 169,232 | 2.0 |

## SOCIAL NETWORK AD SPEND

Data from eMarketer for the U.S. only for sites where social networking is the primary activity. Social network offerings from portals and other sites include Orkut (Google), Yahoo 360 (Yahoo) and MSN Spaces (MSN). Vertical social networks are social networking sites devoted to a specific hobby or interest. Marketer-sponsored social networks are created by a marketer and are either stand-alone sites or part of a larger marketer site. In all cases, figures include online advertising spending as well as site or profile page development costs.

| SOCIAL NETWORK AD SPEND. | 2006 | 2007 | 2011 |
|---|---|---|---|
| Millions of dollars | $350 | $865 | $2,150 |
| % all online ad spending | 2.2% | 4.7% | 8.5% |

| BY NETWORK TYPE | 2007 |
|---|---|
| MySpace | $525 |
| General social network sites (Facebook, Bebo, Piczo, Friendster, etc., not MySpace) | 200 |
| Network offerings from portals, other sites | 95 |
| Vertical and marketer-sponsored networks | 45 |
| Total | 865 |

## TEEN SOCIAL NETWORK USE

Data from Pew Internet & American Life Project, January 2007 for 493 respondents ages 12-17 who use social networking sites; via eMarketer.

| FREQUENCY | % OF RESPONDENTS |
|---|---|
| Several times a day | 22% |
| Once a day | 26 |
| 3-5 days a week | 17 |
| 1-2 days a week | 15 |
| Every few weeks | 9 |
| Less often | 11 |

| REASON FOR USE | % OF RESPONDENTS |
|---|---|
| Stay in touch with friends you see | 91% |
| Stay in touch w/friends you rarely see | 82 |
| Make plans with your friends | 72 |
| Make new friends | 49 |
| Flirt with someone | 17 |

## VISITORS TO SOCIAL NETWORK SITES BY AGE

Data from comScore Networks via eMarketer for August 2006.

| AGES | MYSPACE | FACEBOOK | FRIENDSTER | XANGA | TOTAL INTERNET |
|---|---|---|---|---|---|
| 12-17 | 11.9% | 14.0% | 10.6% | 20.3% | 9.6% |
| 18-24 | 18.1 | 34.0 | 15.6 | 15.5 | 11.3 |
| 25-34 | 16.7 | 8.6 | 28.2 | 11.0 | 14.5 |
| 35-54 | 40.6 | 33.5 | 34.5 | 35.6 | 38.5 |
| 55+ | 11.0 | 7.6 | 8.1 | 7.3 | 18.0 |
| Unique visitors (000) | 55,778 | 14,782 | 1,043 | 8,066 | 173,407 |

# AWARDS & TOP AGENCIES

CLAUDE SHADE

**GOODBY TEAM:** From l., Will McGinness, Toria Emery, Ronny Northrop, Rich Silverstein, Mike Geiger, Hashem Bajwa, Jeff Goodby and Keith Anderson

**Goodby, Silverstein & Partners** was selected **Digital Agency of the Year** in Advertising Age's Digital A-List Special Report (AA, Oct. 16, 2006). Goodby's dramatically ramped-up resources devoted to interactive were credited with boosting the agency's prospects. "Check out the cowabduction website for the California Milk Processors Board, or Goodby's use of interactive techniques to transform GM's Saturn car brand, or, if you haven't seen it yet, the e-mailable Comcast marionette. All make a great case that this shop is not what it was," wrote Ad Age, in the report.

**Nike** was selected **Digital Marketer of the Year.** "Nike has done a masterful job of maintaining a consistent brand image across various channels, making sure what consumers experience in stores carries over seamlessly to the web," Ad Age said.

**MediaVest** was named **Digital Media Agency of the Year.** "[The agency beefed] up its digital expertise, building a 60-person team, MediaVest Digital Connections, [to] help the agency apply an integrated approach to media planning and buying. It's helped the agency win digital business from such marketers as Coca-Cola Co., EarthLink and, most recently, Mattel," according to the report.

**Philip's Norelco Bodygroom** effort was named **Digital Campaign of the Year.** The report noted: "At the center of the push is the Bodygroom guy, the white bathrobe-wearing gent who resides at shaveeverywhere.com and has been visited by more than 1.7 million unique visitors since the website's May launch. In a mock-smooth tone, he praised the virtues of trimming, delivering lines, like `With a hair-free back, well-groomed shoulders and an extra optical inch on my [bleep, while an image of carrots flashes on the screen], life has gotten pretty darn cozy.' The product was the top seller in the Amazon.com personal-care category for eight consecutive weeks and overall has tripled original sales expectations."

**THE BODYGROOM GUY**

## TOP 10 DIGITAL AGENCIES

Data from Ad Age's upcoming Agency Report (AA, April 30, 2007). Tables on this page are rankings by 2006 U.S. interactive revenue in millions. All figures are Ad Age estimates. Agencies with interactive revenue greater than 75% of total revenue are considered wholly interactive and are ranked at 100% of the revenue; those with less than 75% interactive revenue are ranked by their interactive revenue only.

| | | U.S. INTERACTIVE REVENUE | | |
|---|---|---|---|---|
| RANK | AGENCY [PARENT] | 2006 | 2005 | % CHANGE |
| 1 | Avenue A/Razorfish | $235.4 | $189.8 | 24.1 |
| 2 | Sapient | 228.0 | 176.0 | 29.6 |
| 3 | Digitas | 163.2 | 155.0 | 5.3 |
| 4 | Wunderman | 113.4 | NA | NA |
| 5 | Rapp Collins Worldwide | 107.1 | 95.9 | 11.7 |
| 6 | OgilvyInteractive | 103.2 | 91.2 | 13.2 |
| 7 | Organic | 102.0 | 72.0 | 41.7 |
| 8 | AKQA | 98.0 | 62.0 | 58.1 |
| 9 | DraftFCB | 94.1 | 90.2 | 4.3 |
| 10 | IMC2 | 92.7 | 64.0 | 44.9 |

## TOP 10 AD NETWORKS

Data from comScore Media Metrix. Ad networks extracted from comScore's February 2007 Ad Focus ranking by Ad Age. Unique visitors are in thousands. Reach % denotes the percentage of the total internet population that viewed a particular entity at least once in February.

| RANK | SITE | UNIQUE VISITORS | % REACH |
|---|---|---|---|
| 1 | Advertising.com | 149,094 | 85.0% |
| 2 | ValueClick | 128,754 | 73.0 |
| 3 | Casale Media Network | 113,193 | 64.0 |
| 4 | Tribal Fusion | 111,285 | 63.0 |
| 5 | Vendare NetBlue - TrafficMarketplace | 103,909 | 59.0 |
| 6 | Blue Lithium | 92,011 | 52.0 |
| 7 | DRIVEpm | 91,925 | 52.0 |
| 8 | Specific Media | 90,851 | 52.0 |
| 9 | 24/7 Real Media | 89,750 | 51.0 |
| 10 | PrecisionClick | 75,983 | 43.0 |

# MISCELLANEOUS

## PODCAST AD SPENDING AND USERS

Data from eMarketer, February 2007. [1] Includes advertising and sponsorship spending. [2] Individuals who have ever downloaded a podcast. [3] individuals who download an average of one or more podcast(s) per week.

| | 2006 | 2008 | 2011 |
|---|---|---|---|
| **U.S. podcast ad spending (millions)** [1] | $80 | $240 | $400 |
| **Total podcast audience (millions)** [2] | 10.0 | 25.0 | 55.0 |
| **Active podcast audience (millions)** [3] | 3.0 | 7.5 | 18.0 |

## WHAT MIDDLE MANAGERS SAY ABOUT OBTAINING NECESSARY DATA

Data from Accenture, January 2007 via eMarketer. The table shows the percent of 1,009 U.S. and U.K. respondents.

| | % RESPONDING |
|---|---|
| **Miss information that might be valuable almost every day because it exists elsewhere in the company and just cannot be found** | 59% |
| **Having to go to numerous sources to compile information is a difficult aspect of managing information for their job** | 57 |
| **Less than half of the information received is valuable** | 53 |
| **Information that is obtained has no value** | 50 |
| **Gathering information about what other parts of their company are doing is a big challenge** | 45 |
| **Accidentally use the wrong information at least once a week** | 42 |
| **Other parts of the company are not willing to share information** | 40 |
| **There is so much information available that it takes a long time to actually find the right piece of data** | 36 |
| **Competitor information is hard to get** | 31 |

### TO REACH US

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Nielsen//NetRatings:

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## IN UNIQUE VISITORS
## IN PAGE VIEWS
## IN GROSS USAGE MINUTES

Source: 12-month averages of Nielsen//NetRatings Financial News & Information category, excluding portals and breaking out Dow Jones Online into Marketwatch.com and WSJ.com. ©2007 Time Warner

"The #1 standout in the business and finance category is CNNMoney.com . . . it rules the roost."

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