Interaction

All change: marketing in addressable media

April 2007

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Part of the This Year Next Year series

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Contents

Introduction

Welcome to the third iteration of the GroupM *This Year Next Year* series, this one dedicated to the interactive media. This publication and the data it contains are intended for all marketers and media companies wherever and whoever they are; sellers of branded goods and services, retailers and online merchants, direct and indirect sellers, makers of programmes and owners of the means of distribution. The one thing we intend this disparate audience to have in common is scale: our loose definition is 'large advertisers' rather than the host of much smaller enterprises which may now deliver in theory at least 'global' messaging. We hope it gives you a broad view of this increasingly important marketing environment, and that it stimulates some debate and offers some balanced perspective and fresh insight.

The back half of this report is a collection of data and opinions from 28 countries intended to give a sense of scale and direction. But first we should discuss interactive media itself and the fears, hopes, opportunity and hyperbole which surround it. It has created a new lexicon of wikis, social networks, cloud computing, blogs, long tails, click fraud, peer-to-peer, user-generated content and cookies, and an overwhelming sense that nothing will be quite the same.

We must discuss this right now, not some time in the future. In many developed markets online penetration exceeds 60% of individuals, the vast majority having graduated from dial-up to broadband. Online is already a mainstream component of consumer behaviour and media consumption.

In 2007 GroupM will for the first time invest more than $2 billion online on behalf of our clients around the world, much of it with media vendors which did not exist a decade ago. As a result we find ourselves charting new waters for the industry and we think it is time to offer some practical advice on the good, bad and indifferent opportunities which abound.

We welcome your comments and your questions.
Please e-mail us at publications.london@groupm.com

Our advice

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Panic, a little

We are absolutely certain that marketing must urgently harness interactive media and the behaviours it induces. Panic is a natural response to any structural change in consumer behaviour or communication. But be assured that the fundamental purpose of communication strategy remains unchanged.

This purpose can be summarised as the need to reach consumers at the right time, in the right place, with sufficient force to induce an action; the need to engage them to better persuade them of our brand or product benefit; the need to protect and develop reputation; and the need to influence the purchase funnel which ultimately produces the transactions which drive our businesses.

Reach, engagement, reputation and transaction are familiar concepts, but an interactive, 'always on' world exaggerates the potential to succeed and to fail.

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Three qualifications before we go on

Many of the behaviours we witness today, particularly those that concern radical shifts to interactive environments, are most pronounced among younger consumer groups. Time alone will tell if the YouTube generation will behave differently from its predecessors. We think they will because what their parents (i.e. us) regard as 'technology' they regard as a utility. **Anything that you grow up with is not technology.** Born in 1960? Television is not technology. Born in 1985? The cell phone is not technology. Born in 1990? The PC is not technology. Born in 1995? YouTube is not technology. Middle-age is a dangerous place from which to presume to tell the difference, and to assume that change is restricted to kids is more dangerous still.

Second, **the world is not flat**. The US, Western Europe, South Korea, South East Asia, Australia, New Zealand and Japan dominate the 'connected' universe in terms of the PC and fixed broadband. The east of Europe, parts of southern Europe and much of Latin America are lagging behind. In the vital developing markets of India and China we may witness wired infrastructure being bypassed completely, leaving mobile as the principal interactive forum. The interactive media world is everywhere localised, exactly as traditional media are.

Finally, **the data are imperfect**. Revenue monitoring is fragmentary. What advertisers and other publishers spend on content is basically unknown. On top of this, it is hard to tell large advertisers from small. 15% of your (crudely measured) local advertising revenue may be going to the internet, and half of this may be search, but this does not mean the large advertiser should follow suit, even though the internet media owners might wish they did. Another obstacle is how to value accurately transactions paid for by cost-per-action rather than cost-per-thousand. Quantities quoted in this report unavoidably involve our opinion, but we have tried to remain objective.

So, what do we mean by interactive?

For the purposes of this report we define interactive as 'addressable electronic media'. These are channels in which we can target messaging at the individual level in the knowledge that the recipient of that message can respond directly to us or engage him or herself with a deeper content or brand experience.

This definition is narrow and excludes digital and on-demand television which have the theoretical but not practical ability to qualify. A combination of infrastructure and privacy issues have so far limited the potential for TV to achieve full addressability and have also limited the potential to deliver fully interactive content to the television itself.

Today's interactive business principally comprises fixed and mobile internet, or more specifically the internet protocol (IP) technology which makes possible a hyperlinked world. IP will eventually pervade every channel we use and will thus change every aspect of marketing and communication strategy.

"IP will eventually pervade every channel we use and will thus change every aspect of marketing and communication strategy"

We try to avoid calling the internet or the web a 'medium'. We prefer to think of it as a platform or even a parallel universe. Every marketing function has its place in the online environment, from message creation to product distribution; from sponsorship to PR; from direct mail to direct and indirect selling; from trade marketing to merchandising. It is a network of opportunity which needs to be mapped for brands and their stewards.

The other reason we are reluctant to describe the internet as a 'medium' is to avoid the mistaken implication that all 'media' are suitable for carrying advertising messages. Such a mistake is understandable: '360 degree communication', 'surround the consumer', 'ubiquitous messaging' - advertisers and their agencies abhor blank space just as nature abhors a vacuum. But not all the internet is suitable for commercial messaging.

MySpace is not your space

Our advice is to tread carefully. Agreed, the internet offers any number of media opportunities: for example, the home page of Yahoo is as 'ad friendly' as the evening news. But we cannot say the same about MySpace profiles, Instant Messenger and individual inboxes.

MySpace and Facebook profiles have been likened elsewhere to the bedroom walls of kids and students. This implies a sense of intimacy and privacy but also opportunity as most kids have brands as well as bands on their walls.

A reasonable view is to hold yourself and your communication to a higher standard of relevance, value and transparency as the environment in which it appears becomes more personal. Failing to do so can lead to simply being ignored, if you are lucky, or to lighting a fire of discontent under your own house if you get it really wrong.

A four-pillar framework

Reach

The emergence of interactive media is having an increasingly profound effect on the traditional media we rely on to deliver reach. Reach remains a prime communication objective for advertisers in many categories. Brand advertisers in particular need digital media to replace audiences they are losing in traditional media, and to add frequency against light television viewers. Critically, these advertisers need multi-platform reach strategies which use the strengths of each channel in concert. An 'opportunity to see' is precisely that: an opportunity. Advertisers should beware of merely porting messages from one screen to another without adding real value to the customer experience.

Engagement

Short of serving them yourself digital media are the easiest and most versatile way to deepen the relationship you have with your customers or other stakeholders. Interaction is essential; consumers expect every brand or service to present itself in some kind of online environment, and expect this presence to be of use or interest, and to furnish a substantial or involving experience. It is instructive to observe a transition from database marketing to interactive marketing. Database focuses on using data to 'get a single view of the customer'. Interactive demands that the customer gets a single view of you. The message here is one of consistency at the core of the proposition or message, yet which accommodates sufficient personalisation to help the consumer engage with the brand or message on his or her own terms.

Reputation

Interactivity and electronic publishing has democratised information. This presents as many challenges as opportunities. You can still run but you can't hide in a world where good news travels fast and bad news travels faster. Brands and businesses need to 'listen to the conversation' and understand how to participate and respond. Used smartly (even if just passively monitoring) the 'network' can act as an early warning system. Used actively the noise can recalibrate communication strategy and even product development. In fast-moving businesses from entertainment to technology this speed of thought and reorientation is imperative. These are among the many sectors which derive over half of their sales from products less than a year old. All the evidence suggests a general quickening of product lifecycles and of consumers ever more inclined to rush to judgment, as is their prerogative. The costs of unwittingly foreshortening the useful life of such products and of misreading their markets are correspondingly magnified.

Transaction

Media is no longer part of the communication chain alone. Interactive media is both a marketing channel and a channel to market. Increasingly brands use online channels to sell their own goods and services or to promote their sale through other online merchants. Even for brands rarely sold online the channel has become a key part of the purchase funnel and therefore a process to be managed. The implications of this are too extensive to be discussed in this report but there are some headlines we should check off.

We are dealing with the entire value chain from recruitment, to trial, to merchandising, point of sale, fulfilment and customer service in a single channel which requires integration of thought and systems in equal measure.

"Even for brands rarely sold online the channel has become a key part of the purchase funnel and therefore a process to be managed"

Consumers expect to be able to transact online and sales will be lost if they cannot.

Brand owners have to manage channel conflict in every market and delicate issues such as international pricing.

For every advertiser, interactive marketing needs to move front and centre on one or more of these four pillars according to the business or marketing challenge it faces, with budget allocation to match.

As a matter of record GroupM does not subscribe to the vendor view that the amount of budget allocated to interactive platforms should correlate directly with the amount of time consumers spend in those environments. Our counterpoint this view is that interactive 'media consumption' is anything but a homogenous activity (such as watching television) and that its value from an advertising and marketing perspective is equally fractured. As we said earlier, you can't advertise in everything.

A short tale of the long tail

The Long Tail is a book by Chris Anderson, editor-in-chief of Wired. It argues digital platforms allow a change in a distribution model from selling more of less to selling less of more, and making more money so doing than a 'hit driven' business (look no further than Amazon).

"The real value of the long tail of advertising to you is using IP in measurement"

The idea has far-reaching implications not least in media, though the intended readers of this report may be the exception. As members of the Fortune 1000 and its equivalents around the world you represent the fat end of marketing and advertising's long tail. It may be true that search advertising is half of all online advertising but it is NOT half of the online advertising by companies like yours.

The real value of the long tail of advertising to you is using IP in measurement, delivery and interactivity to ascribe value to niche marketing activity too small or local to be picked up in existing survey-based research, or to distribute messaging specific in content and audience to a degree of granularity simply impossible in conventional media.

What does granular messaging mean? The economics of traditional messaging – in both production and distribution – usually obliges advertisers to nest a single proposition at the heart of their offer and develop messaging to support it. In a simple example an automotive advertiser must choose one of several options: 'it's fast', 'it's safe', 'it's environmentally friendly', 'it's big' or 'it's small'. In a world without constraints you can revise your brand map and communicate all of these, and add discrete messaging about cup holders, seat belts, air bags, colour, price, availability in this zip code, the model for disabled drivers, the adjustable pedals and the local clubs for owners. The idea is even clearer for multiple product retailers; the long tail allows you to be an advertiser of guavas as well as groceries, of fish as well as fowl. It is incumbent on every marketer and agency to draw his or her own messaging map and search for all the components that may drive a consumer towards the required action and to use the long tail to their advantage.
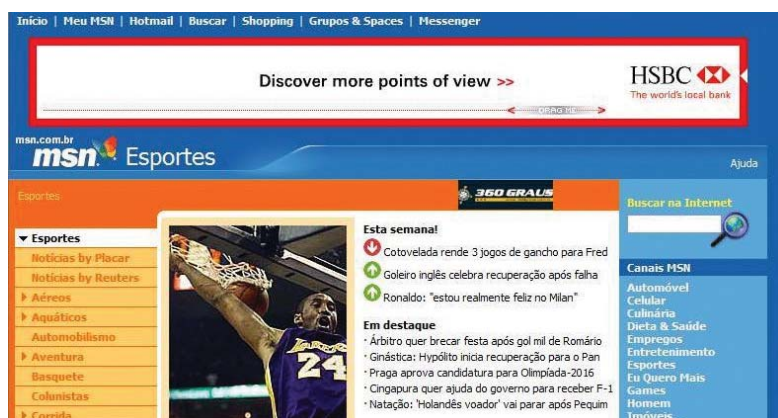
The long tail, to quote Google (the world's biggest database of consumer behaviour), also allows some messaging components to be 'evergreen'. In the search environment in particular campaigns can run and run and bypass the seasonal restrictions of traditional platforms. Always available, always open, in an always-on world.

Among the many potential implications of this is that a longer and more measurable tail creates a substantial buffer against media inflation in other channels simply by extending advertiser options.

The operating system for life

Consumer broadband access is a 'ratchet change': an improvement the user will never revoke. There is as much chance of users going back to dial-up as there is of a black-and-white television revival. Broadband means speed and 'always on'. But it is the transformation in behaviours these cause which should concern and delight us.

In the dial-up era usage of the internet was purposive or task-driven. You went online at specific times for specific reasons, did what you needed to do, and signed out. The experience was not wildly satisfying and the meter was always running, discouraging browsing. Conversely, broadband is all-you-can-eat and a pleasure to use, so has created a new kind of behavioural freedom.

For those fortunate enough to have it, broadband has become the 'operating system for life', in the way Windows is the operating system for PCs. It has transformed our relationships with banks, retailers, corporations, friends and pretty much everything else – including our relationships with brands and with the media. Once we were customers; now we are 'power consumers'. We are infinitely better-informed about price, availability, and quality (from the opinions of others) than was ever the case before. What we see, hear and share online strongly influences our purchase pathways.

"Broadband has created a concept we call 'media meshing' in which we use online resources to qualify and enrich our media experience"

Broadband has created a concept we call 'media meshing' in which we use online resources to qualify and enrich our media experience, which in turn amplifies the value of that experience. For the keenest, most-connected onliners, broadband and the PC are the principal gateway to entertainment as broadcasters and studios make more of their copyright content available online. For the rest of us, IP will surely pervade TV distribution to achieve the same effect.

These are ratchet changes. As advertisers and programmers we must resolve to embrace this and find ourselves a place in the evolving value chain.

In parallel with rapid growth in supply we see equally rapid growth in the devices that support the new bandwidth, and enthusiastic consumer take-up which has in turn fuelled the potential for more variations of content. Examples include the PC, the cellphone, the PDA, satellite radio, Xbox 360, the DVR, PSP and the iPod. No single device changes the game, but collectively and when networked they certainly do.

The iPod for example is ratchet technology in the way the Walkman never was. Not because of the Apple product's superior portability and storage, but because of its connectivity. The Xbox 360 eclipses its forerunner and the PlayStation 1 just as the BlackBerry and Windows Smart-phone eclipsed the early Palm handhelds. From this brief observation we can probably conclude that the network-connected DVR/PVR – often regarded as one of the horsemen of the advertising apocalypse – has barely begun its evolution. Yet it has already made redundant the VCR, that primitive playback device which managed to make recording a chore. What might your DVR do for you when it can download movies on demand or distribute the contents of your PC's hard drive? Wouldn't it be good if some of that content was yours?

It's no surprise that the content we consume has also changed. On a good day, the home page of Yahoo delivers hundreds of millions of impressions. iTunes sells more music than almost any retailer, to say nothing of the millions of TV shows it shifts. The number of blogs on MySpace, MSN, Google and Yahoo are well into the tens of millions, SMS messages massively exceed the total number of voice calls, Craigslist is decimating the newspaper classified business and millions of people are playing multiplayer games online. Even the dreamy optimists of 1999 could not have forecast this range and depth of participation.

Whose content is it anyway?

User-generated content is perhaps the most intriguing of all digital phenomena. It is possible that more has been published by more individuals in the last two years than has previously been published in human history. Quantity overwhelms quality but that is really not important. The very act of production is media consumption. It does not matter if no-one else reads it.

We appear to be witnessing a relentless trend of consumers deserting traditional sources of content and thereby placing brand marketing in mortal danger - and it all stems from the invention of internet protocol, broadband access, and the devices that support it.

The answer for many businesses has been to develop more or less content-rich brand web sites. The argument is simple. If we can get consumers to engage, we will secure preference and loyalty. The question asked less often is 'how many for how long'. Almost all advertiser websites lack reach and stickiness, suggesting they are at best only part-answers to the question.

Partnership is the thing. Partnership with consumers, with brands acting as the trigger or facilitator or host of a community. Partnership with professional publishers or content owners, whose business it is to sustain the interest of their constituencies.

Interactive media:
what we actually buy

In the analogue world we almost always buy either audiences (e.g. so many GRPs) or we buy units (so many pages in Vogue). We invest in systems to measure the relevance of these units against target audiences, to compare their relative value to one another and to combine them to optimise the efficiency with which they deliver reach and frequency. These help us derive 'internal' measures of media performance from which we derive models that indicate the best path to business effectiveness.

Contrast the two-fold promise of interactive media:

That we will increasingly buy actions – a click, an enquiry, a sale – rather than audiences or units.

That we will buy actual behaviours – what was looked at, what was bought – rather than assumed behaviours, such as an interest in golf clubs among those who watch golf on television.

This represents a radical departure with profound implications which stretch far beyond the world of direct response advertising. It relates particularly to our pillars of reach and transaction.

The purchase of actions is the very stuff of internet search advertising as built by Yahoo and dominated by Google, but in the world of display advertising this is uncharted territory.

It is the cookie which underwrites this rich promise. Let that other phenomenon of our age, Wikipedia, describe what they are:

HTTP cookies, sometimes known as web cookies or just cookies are parcels of text sent by a server to a web browser and then sent back unchanged by the browser each time it accesses that server. HTTP cookies are used for authenticating, tracking, and maintaining specific information about users, such as site preferences and the contents of their electronic shopping carts.

Cookies thus identify users in any number of dimensions. For example, they let us track down previous visitors to our web site when they appear somewhere else on the web. Better still, we can tell what they looked at, what they bought, and what they browsed but did not buy. A 'real world' version of this would actually be surreal. Imagine if Wal-Mart could actually identify a single viewer of CSI or Lost who bought Tide and a pair of jeans but only browsed for an LCD television. Imagine if an SUV manufacturer could discern a purchase of baby wear as strongly signifying a propensity to purchase a safe family vehicle. We see behavioural analysis replacing demographics as the agent of targeting. As television takes on the characteristics of the internet, courtesy of IP, such strategies will become pervasive.

Let us reflect on another big difference between IP media and all other forms. When we buy a page in the May issue of Vogue we have a reasonable expectation that we can go to any newsstand in the country, pick up a copy and find our ad. Equally if we the buy the first spot in a break at 2015 in a Champions' League soccer game in France we can happily switch on and watch it in Paris, Perpignan or Pau. If on the other hand we buy one million impressions on Yahoo finance we cannot actually witness them in this linear, real-time dimension. Yahoo manages its inventory in a completely different way and 'sells' what appears to be the same space to many advertisers. This is mass personalisation at work.

This poses a crucial question. Is it essential we embed our message in the context of Yahoo's finance editorial? Or would we actually prefer to buy cookies we know represent individuals who exhibit actual behaviours relevant to our purpose? Context versus cookie will be a critical debate in our future, particularly because the real growth in online impressions will **not** arise from rich-context media but from the billions of impressions generated by social networking: e-mail, IM, video- and photo-sharing, and of course the endless volume of profiles and interactions from MySpace, Facebook and their ilk.

Branding exploits traditional-media context for the benefit of association or to commandeer attention. This traditional interruption model does not work so well online, where dimensions are infinite and audiences diffuse. Online's strength is cookies, which grow more abundant as the IP universe expands.

We might, for example, deal in CPMs for context and cost-per-action in cookies in a sort of outbound/inbound model: hybrid pricing for hybrid jobs. Multi-platform marketing offers permutations of price and risk management far in advance of traditional media deals.

Can't pay, won't pay:
the content-funding conundrum

If we are right in supposing the bulk of future inventory growth will come from social rather than editorial interaction, and if we are right about a shift from context to cookie, we see dark clouds ahead for content owners, the majority of whom will watch their multi-platform costs rise faster than the rewards.

"Content creators need to understand the needs of brands; content distributors need to understand the business goals of advertisers; and the brand owners need to be more open-minded about what content they will associate with"

In our version of events only the fittest will survive; only those with the online 'Superbowls' to build reach rapidly and launch new products. Vendors lacking such events will be unable to extract premium CPMs in a market of abundant supply unconstrained by fixed costs such as broadcast spectrum and paper. The only certainty is that the consumer will not pay. In the developed world total percentage of income allocated to media appears to have peaked. Subscription content has stalled along with pay-per-view. In many markets broadband is 'free' (to the home) and mobile network operators face downward pressure on voice pricing and little evidence of growth in subscription data services.

The more fortunate minority are those with multi-platform events rights which capture and keep attention, and spur the interaction that creates engagement and value. Responsible husbandry of such assets must now entail aggressive engagement between content creators, content distributors and advertisers. Content creators need to understand the needs of brands; content distributors need to understand the business goals of advertisers; and the brand owners need to be more open-minded about what content they will associate with.

Interactive media:
how we measure it

Measuring reach and frequency at the page-view level is simple and well-established. The more important opportunity is that the very same IP attributes which permit granular targeting also permit granular measurement. The cookie acts like a fingerprint which attaches to the original ad exposure and stays attached throughout the user journey to form a purchase history. This means that business and marketing effectiveness are remarkably easy to measure. IP-delivered media therefore exhibit accountability superior to any non-IP channel. This is all obvious stuff, but make sure you are measuring those things which actually make a difference. No-one but the media vendors has ever made a buck out of a click.

"No-one but the media vendors has ever made a buck out of a click"

It is imperative that you measure an event of value; a sale, a piece of data or an interaction which deepens engagement. This is of particular importance in paid search when the seller's interests and yours may not be aligned. Some advertisers are seduced by the idea they don't pay until someone clicks, but as so often there is no such thing as a free lunch.

Some suggestions:

Influence what people choose to search for

Ensure that any search in category finds us

Ensure that the content to which that search result links is strictly relevant to the search itself

Set your budget for outcomes not clicks

If we do this we will win customers with our relevance and timeliness, and maximise the commercial benefit to all.

The torrent of data which IP generates is a challenge in its own right. In 2006 GroupM alone placed in excess of 200 billion online impressions on websites, search engines and blogs around the world. Each impression sent back multiple data to help us measure and optimise activity. We expect this torrent to double in 2007. Our conjoined challenge is to turn data into information, information into marketplace advantage and marketplace advantage into business results.

Interactive media: how it measures everything else

An interactive destination can act as a tell-tale for all other marketing activity. From web traffic and buzz we can easily discern the impact of online marketing, television, print, sponsorship and promotion. This facility is in our opinion under-used at present and we encourage our clients to try it. We see a positive correlation between the growth of web traffic and the validity of these measures. We assume until proven otherwise they will in future substitute conventional survey-based research, accelerating and adding texture to marketing analytics.

Towards a new communication brief: the magnificent seven

Seven questions every time we plan:

1) If we are building an interactive destination what do we want to happen when a consumer visits?

2) How much is that action worth to us and how many times does that action need to be repeated to justify the investment?

3) What are we trying to measure; how will we gather data; what should we do with it?

4) How will we be sure that the user knows more about us as a result of being engaged: are we allowing the consumer to participate or are we just making a speech?

5) Are we giving consumers tools which allow them to interact with us and to distribute our messages among their own communities?

6) How are we reacting to a consumer who is searching in our category and thus declaring his or her intent? How do we influence what is searched for? How do we ensure that any search in category finds us, and ensure that the content to which that search result links is specifically relevant to the search itself?

7) How are we influencing the consumer's propensity to buy?

So what's next?

Addressability is everything. As IP makes each channel or medium addressable and internet-like we can assume that television, print and other channels will become newly animated and versatile. Evolution will then expand interactivity and mobility. Our four pillars will remain a relevant toolbox to plan our next action.

Gaming is more than a game. The highest order of interactive content today is the world of gaming. It's a bigger business than Hollywood and abounds with astonishing statistics. For example, the 2006 subscription revenue to the online role-playing World of Warcraft in 2006 was widely reported to be greater than the US theatrical box office receipts of Universal. World of Warcraft is owned by Vivendi – the former owner of Universal. Gaming represents a huge amount of screen time in an increasingly large consumer segment. As these games move online and attract multiple players simultaneously so the opportunities for brand and advertiser integration will multiply. Alongside the media challenges this presents we see immense potential and no little challenge for the creative community in creating applications for brands which will do justice to the astounding quality of the environments in which they will live. The rapid evolution of game play in a physical sense of human/machine interface in the world of Xbox 360 and PS3 is challenging but the new model created by the Nintendo Wii platform has raised the bar to a whole new place.

We see gaming as a very high growth area in 2007 and beyond with as much attention being paid to game release schedules as to new television programming seasons.

In a parallel development we advise advertisers to stay abreast of the next iteration of the community and social-networking phenomenon. We see the virtual taking on more and more of the characteristics of the real world and as the population of projects like Second Life grows, individuals groups and businesses will adapt the platforms to their own needs. IBM, Sears and Sony among many others are already there and Second Life has already celebrated its first real dollar millionaire who got to that happy place by trading real estate made of nothing more than pixels.

"Place-based, time-sensitive messaging close to the point of sale almost cannot stop itself from being successful as brand owners strive harder to message at the moment of truth in retail"

The prediction we are most often asked to make is for mobile advertising. So far we have only one proof, which is even the most pervasive devices do not necessarily become major-league advertising platforms. Our pillars do however depict mobility as a big transaction driver. Place-based, time-sensitive messaging close to the point of sale almost cannot stop itself from being successful as brand owners strive harder to message at the moment of truth in retail. In the Far East such applications are commonplace. But the sad fact is that the processes of mobile marketing remain an unholy mess around the world and in Western Europe and the United States in particular.
The future for mobile in respect of reach, engagement and reputation is much less clear and

success far from certain. Broadcasting to mobile devices is difficult to say the least, and on the current family of devices we doubt consumers will do more than 'chunk' on snack-sized pieces of content. It is probably a mistake to assume consumers want video content on their phones and that advertisers will foot the bill. We believe that phone-delivered content will need to be highly specific and premium-priced to encourage wide-scale adoption, and even that could prove a contradiction in terms. Our main hope is to see social networking return to mobile, where it all began with the startling growth of SMS, MMS and camera phones. Vodafone's deal with MySpace to allow profile access and editing on the network is brave and deserves to succeed as it is driven entirely by adding value to the consumer experience.

The next generation of devices may transform mobile's prospects. Today's mobile universe, 3G included, is optimised for voice with other functionality appended. Tomorrow might be about multimedia devices which also let you call. We will see.
We will also see the reality or otherwise of the 'three-screen' world, usually defined as the TV,

"It is probably a mistake to assume consumers want video content on their phones and that advertisers will foot the bill"

the PC and the mobile device, collectively celebrated as the 'Martini plus' notion of anything, anytime, anyplace, anywhere. We can't help feeling that this may be an application looking for an audience. Some content will be expressed across all three screens but both programmers and advertisers will need to determine what is fit for purpose where.

From a trading standpoint our expectation is that more and more transactions will be driven by behaviour and outcomes. We may well become increasingly indifferent between the vendors of those outcomes, and this would have a major impact on current hierarchies.

The growth of interactive media in terms of importance, pervasiveness and value is a one-way bet. Our approach is aggressive evolution of our planning and trading and the systems which support these. We are engaging with new vendors, new data, and new currencies and, in some cases, new notions of reality. We now know for sure that consumers embrace on-demand, interactive environments, and that online marketing drives business performance; our next challenge is to find relevant, efficient and effective ways of doing the same on each platform as it emerges, and accelerating our ability to act and react as quickly as the consumers upon whom we all depend.

From the perspective of agency/client relationships we welcome the challenge of working with you to integrate all these channels to extract the maximum value and synergy. GroupM aspires to be a world-leading expert in how messages are disseminated across digital platforms in each and every one of the environments we have described in this paper. We welcome also the opportunity to integrate our efforts with those of creative partners inside WPP and beyond.

Drivers and Inhibitors

We asked our respondents from 28 countries representing about 96% of global online internet marketing investment to score these preselected drivers and inhibitors to digital marketing.

We rate social networking and the proliferation of entertainment and information somewhat higher drivers than technology. Social networking generates vast quantities of traffic and opportunities-to-reach. Information and entertainment encourage people to stay online longer and return more often, generating volumes of behavioural evidence.

The drivers score higher in aggregate than the inhibitors (1,043 to 866) so we are net optimists about digital, which is definitely the right result! Chief among the constraints are 'historic attachment to traditional media' and 'lack of client understanding', both of which are our problems to fix.

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In-game, mobile and interactive TV

We asked our respondents to give us an opinion on the potential shares of media investment these three channels might take in 2010 and 2015. Almost none of this is measured at the moment. This is not presented as a formal forecast. It is just the average of guesses from mainly mature advertising markets. It is a western and therefore conservative consensus. The numbers are still substantial. Convergence lends an unreal air to this exercise; by 2010 to distinguish channels in this way may seem archaic.

Potential shares of media investment

Mobile		In-game		Interactive TV	
2010	2015	2010	2015	2010	2015
2.2	4.9	0.8	2.1	2.7	7.5

Penetration of digital technology

	3G mobile devices (% of adults)	Interactive TV % of all homes
USA	94	54
Canada	n/a	47
Belgium	3	
France	9	
Germany	5	
Hungary	1	
Italy	6	13
Netherlands	13	25
Poland	Launches 2008	
Spain	15	
Sweden	17	2
UK	12 estimated	75
Australia	10	13
China	1	
Indonesia	3	1
Japan	44	39
Hong Kong	17	35
Malaysia	1	34
Singapore	13	
Taiwan	10	

Internet advertising revenue

The most striking thing is its rate of growth, typically six times the rate of traditional media. In western Europe the internet is the principal source of measured-media revenue growth, and in North America it runs a close second to TV (and would be first but for the explosive growth in the USA's Hispanic TV). It reaches similar multiples of traditional-media growth in the developing world too, but here it tends to be dwarfed in absolute terms by TV.

People argue about whether paid search should be counted as 'advertising'. Search is a form of listing and is not advertising. However, most brand managers should be responsible for search. There is only one marketing budget, so we include search wherever possible. In developed markets, it is half or more of all internet marketing investment, so inclusion makes a big difference to internet's share. The US and Germany are important examples, rising respectively from 7% to about 12%, and 4% to 13%. As we mentioned before, even these enlarged figures are certainly less than the whole truth.

There is no significant correlation between internet's share of advertising and either the number of connected homes or the number of regular internet users. There is of course complete correlation at zero, and at the other end of the scale mature countries with high broadband usage appear to be converging on a norm.

Measured internet advertising revenue is far from comprehensive. It never measures all investment, nor does it measure advertiser investment in building websites.

Forecast revenue growth 2007 (%)						
	Internet	All media	Internet share %	Broadband penetration % of homes	Internet users (% of population)	
USA	19	3	12	56	64	
Canada	28	3	9	69	67	Includes e-mail
Argentina	70	14	1	9	46	
Brazil	70	14	4	26	14	
Mexico	33	10	1	20	21	
Belgium	34	3	5	33	49	
Czech Republic	39	6	4	21	44	
France	40	5	6	42	51	
Germany	30	3	13	37	60	
Hungary	23	2	4	22	36	
Italy	26	3	5	40	50	
Netherlands	30	3	6	83	78	
Poland	43	9	4	13	37	
Portugal	25	1	3	41	35	
Russia	40	17	3	26 (Moscow)	36	
Spain	35	7	3	18	20	Display only
Sweden	25	8	13	59	36	Display and search only
UK	36	5	18	58	85	
Australia	40	6	12	70	61	
China	28	19	2	21	56	Display only
India	60	21	2	1	9	
Indonesia	25	17	2	10	9	
Japan	25	2	8	72	57	Display, search, mobile and production
Hong Kong	30	15	5	80	57	
Malaysia	30	3	0.1	10	42	
Singapore	36	10	19	70	68	
Taiwan	29	5	7	60	66	
Thailand	27	5	1	2	20	Display only

Argentina

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Beverages	1			●				●
2 Technology	7			●				●
3 Mobile phones	6			●				●
4 Fast food	4			●				●
5 Automotive	3			●				●
6 Banks	2.5	●						●
7 Carriers (cell)	2			●				●
8 Insurance	2	●						●
9 Pharmaceutical	2			●			●	
10 Foods	less than 1			●			●	

Media Planning

Typical cost
10U$S   CPM

Keyword example
No data

Top sites

		Page views				Page views
1	Grupo Clarin	7.227.158		6	Páginas Doradas	562.195
2	LANACION.com	5.486.767		7	La Voz del Interior	393.946
3	Terra Argentina	4.421.909		8	Datafull	260.741
4	UOL Argentina	1.468.333		9	AmbitoWeb	242.954
5	Páginas Amarillas	656.89		10	La Capital de Rosario	211.218

Metrics

We use mostly CPM for Buying   Mostly cost-per-click for direct marketing

TGI, EGM for ratings and users attitudes

Time and activities online

Time online (Time in minutes)

	Week	Weekend
Work	96	94
Home	82	91
Cafés	69	51

Activities online

E-Mail	38%	Read national news	7%
Personal research	24%	Read international news	6%
Instant Messages	22%	Sports sites	5%
Chat Room	18%	Own site	3%
Read Newspapers	10%	Health sites	3%
Education/Learning Sites	9%	Check the weather	2%
Electronic Postal	9%	Software download	2%
Listen to music	8%	Listen to the radio	2%
Music download	8%	Home banking	2%
On line Games	8%	Humor	2%

Australia

Categories

Product category	Estimated % of media investment which goes online	Direct response	Main communications objective(s)		Customer loyalty	Trend for 2007 online spend		
			Soft response (e.g. more information)	Brand awareness		Below all-online average	At all-online average	Above all-online average
3 Recruitment	80	●						●
4 Real Estate	39	●						●
5 Media	26			●				●
6 Finance (inc insurance)	11.2	●						●
7 Office & Bus Equip	10.9			●			●	
8 Computers & Communications	8.1	●		●			●	
9 Home Products & Services	5.1			●			●	
10 Motor Vehicles	4.6	●		●		●		
11 Travel / Accommodation	4.3	●		●		●		
12 Retail	3.8			●		●		
13 Health, Beauty, Pharmaceuticals	3.1	●		●		●		
14 Ents & Leisure	2.2			●		●		
15 FMCG	1.3	●		●		●		
16 Government	1			●		●		
17 Other	0.01							
18 Alcoholic Beverages	0.01			●		●		

Media Planning

Typical costs

Finance client - credit cards - $50 cost per application
Low-rate blind network CPM buys - $1- $2 CPM
Low-rate targeted channel CPM buys - $2 - $3 CPM

Contextual display eg News, Sport,Entertainment, large publisher - $40 - $60
Contextual display eg News, Sport,Entertainment, smaller outlets $20 - $40

Keyword examples

Keywords	Estimated average CPC	Estimated Clicks/Day	Estimated Cost/Day
Accommodation	$2.88	2,472	$7,130.00
Accommodation australia	$2.34	57	$140.00
Accomodation	$3.07	641	$1,970.00
Car	$3.40	2,942	$10,000.00
Car auctions	$1.84	59	$110.00
Car audio	$0.65	19	$20.00
Car rental	$4.50	745	$3,360.00
Computer games	$1.28	23	$30.00
Computer software	$5.63	29	$170.00
Computers	$3.88	338	$1,320.00
Credit cards	$9.87	78	$780.00
Finance	$4.22	242	$1,030.00
Laptops	$6.09	148	$910.00
Loans	$9.24	405	$3,750.00
Money	$2.72	504	$1,380.00
Travel	$3.25	801	$2,610.00

Top sites

	Site	Uniques (000s)	Page Imps (000s)		Site	Uniques (000s)	Page Imps (000s)
1	Google AU	8,226	581,115	6	Whereis.com	1,449	14,444
2	Ninemsn (incl Hotmail)	3,844	392,584	7	ninemsn News	1,418	20,223
3	Yahoo!7	1,872	28,622	8	Yahoo!7 Mail	1,405	169,898
4	WhitePages	1,756	19,250	9	Sydney Morning Herald	1,402	50,263
5	Yellow Pages	1,425	19,193	10	ABC	1,352	19,324

Source: Nielsen//NetRatings Netview Oct 2006

Metrics

CPM - cost per thousand impressions   CPC - cost per click   CPA - cost per action - sometimes cost per competition entry for example, mostly cost per application

IAB Australia is reported to be following overseas IAB efforts to develop a TARP model

Australia, continued

Time and activities online

Time online

Home & work combined   1.3 hours per day
Home only   1.07 hours per day

Nielsen NetRatings Netview, Oct 06

% of all users accessing at:

| Work 65 | Home 33 | School or university 11 | Library 8 | Internet Café 4 | Other 18 |

Roy Morgan Jun 06

Activities online (all users)

Search Sites

Email Sites	Travel Sites	Employment Sites	Games and Kids Sites
Banking Sites	Chat and Messaging Sites	Automotive Sites	Classifieds Sites
Directories Sites	Entertainment Sites	TV Sites	Business and Finance Sites
Online Auctions Sites	Sport Sites	Shopping Sites	Dating and Personal Sites
News Sites	Real Estate Sites	Magazines Sites	

Roy Morgan, Jun 06
(does not include newer activities such as VoIP or podcasts)

Belgium

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Automotive	8-10		•	•			•	
2 FMCG	0-1	•				•		
3 Services	2-4	•	•	•	•		•	
4 Furniture	3-4		•	•	•		•	
5 ICT	2-4		•	•			•	

Media Planning

Typical costs

	Ratecard	Nego.
Expensive formats (layers/interstitial/etc) for event campaign	30 € CPM	23 € CPM
Classic formats	26 € CPM	16.8 € CPM
Performance campaign (CPC only)	0,40 € CPC	

Keyword examples

Most expensive: banking sector, ranging 1 - 2.5€ CPC   Regular : around 0.7 €

Top sites

	Impressions	Regular Visitors
MSN	115,000,000	3,944,000
Skynet	91,000,000	3,125,000
Telenet	70,000,000	1,868,000
Het Laatste Nieuws	61,000,000	1,400,000
Pages d'or/Gouden Gids	17,000,000	1,100,000

Metrics

Common: CPC, CPM, CPLead

Metrics in development
CPA, CPConversion

Time and activities online

Time spent online

Work   20% at least 1 hour per day -> estimated average = 45 to 59 min
Home   47% at least 1 hour per day (34% from 1 to 3 hours) -> estimated average = 1 to 2 hours

Activities online

	(daily)		(daily)
E-mail	55%	Instant messaging (webcam)	9%
Instant messaging	23%	Downloading RSS	6%
Chat	20%	Gaming (single player)	5%
Listening to music	15%	Watching video	4%
Online banking	11%	Watching TV	4%

BIM June 2006

Brazil

Media Planning

Typical costs					
CPT = R$ 5,00		CPL = R$ 1,00 (Graphics Media) // R$ 0,30 (Sponsorship Link)			

Keyword example					
Between R$ 1,00 to R$ 3,00					

Metrics					
CPT	CPL	CTR	Impressions	Page Views	Time spent

Metrics in development

Cost per Acquisition (e.g. successful credit card applications)

Gross Audience (page view x dwelltime)

Unique audience 000s				Unique audience 000s	
Google	14,532		iG	11,092	
MSN/Windows Live	13,239		Yahoo!	10,511	
UOL	12,569		Microsoft	9,485	
Orkut	11,719		Globo.com	9,418	
Terra	11,139		MercadoLivre.com	7,564	

Nielsen NetRatings (September-November 2006)

Time and activities online

Time online (per week, all adults)

Monday to Friday - At home: 1 hour - 2 hours	3.99%	Monday to Friday - At work: 1 hour - 2 hours	1.43%	Monday to Friday - Cybercafe: 1 hour - 2 hours	0.48%
Monday to Friday - At home: 2 hours - 3 hours	1.79%	Monday to Friday - At work: 2 hours - 3 hours	0.72%	Monday to Friday - Cybercafe: 2 hours - 3 hours	0.34%
Monday to Friday - At home: 3+ hours	6.48%	Monday to Friday - At work: 3+ hours	4.57%	Monday to Friday - Cybercafe: 3+ hours	0.10%
Monday to Friday - Cybercafe: 1 hour - 2 hours	0.48%	Saturday to Sunday - At home: 1 hour - 2 hours	3.30%	Saturday to Sunday - Cybercafe: 1 hour - 2 hours	0.33%
Monday to Friday - Cybercafe: 2 hours - 3 hours	0.34%	Saturday to Sunday - At home: 2 hours - 3 hours	2.63%	Saturday to Sunday - Cybercafe: 2 hours - 3 hours	0.17%
Monday to Friday - Cybercafe: 3+ hours	0.10%	Saturday to Sunday - At home: 3+ hours	8.17%	Saturday to Sunday - Cybercafe: 3+ hours	0.19%

TGI (Jul05-Jul06)
Copyright TGI LATINA 2006

Top activities (all adults, last 30 days)

Email	26%	Visited a chat room	9%
Personal research	20%	Played games on line	9%
Instant messaging	15%	Education/Learning	9%
Download music	10%	Read the newspapers	9%
Listened to music	11%	Bank services	9%
Read news: Domestic	13%	Visited a sports site	8%
Read news: International	11%		

TGI (Jul05-Jul06)
Copyright TGI LATINA 2006

All change: marketing in addressable media

Categories

	Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand Awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1	Media and advertising	30%			●		●		
2	Business and technology	25%			●				●
3	Computers, software, internet	15%							●
4	Financial	10%	●					●	
5	Insurance and real estate	10%	●					●	
6	Entertainment	8%		●					●
7	Auto and equipment	8%						●	●
8	Government, politics, organizations	8%		●					●
9	Fitness, diet, spas	8%	●					●	
10	Communications	7%	●				●		
11	Retail	6%						●	
12	Transport and hotels	5%		●					●
13	Audi video	4%			●		●		
14	Manufacturing, materials, freight	3%		●			●		
15	Personal care	2%			●				●
16	Games, toys, hobbies	2%			●			●	
17	Schools, camps, seminars	2%	●					●	
18	Medicines and proprietary remedies	1%							●
19	Auto dealers and services	1%		●			●		
20	Confectionery and snacks	1%			●				●

Media Planning

Typical costs

Average CPM of $15.00 - $20.00 net CDN
Cost-per-lead depends upon acquisition type - free acquisition $3.00 - $6.00 net CDN or paid acquisition $30.00 - $300.00 net CDN

Keyword examples

$0.50 - $1.50 net CDN across most categories

Top sites

Top 3   MSN.com 19.1MM uniques   Google.ca 17.3MM uniques   Live.com 17.2MM uniques

Metrics

CPM (cost per thousand)   CPR (cost per click)   CPA (cost per acquisition)

Time and activities online

Time spent online

In total   The average weekly is 14.5 hours; 18-34 are 14.5; 18-54 13.3; 55+ 8.7 and people in homes with children average 14.1

Activities online

	Option: always		Option: always
Read / send email	90% plus	Read blogs	Under 5%
Use search engine	75% plus	Go to social websites	
Look up information for work	20%-40%	Read RSS feed	
Play online games		VOIP	
Use IM		Read a book online	
Show/tell others about websites		Write blogs	
Download music	10%-20%	Listen to podcast	
Listen to internet radio		Watch video podcast/videoblog	
Watch online videos/ trailers		Start/edit RSS	
Download video	5%-10%		

MindShare

China

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Real estate	20.9%		•				•	
2 IT Products	20.3%			•			•	
3 E-commerce	19.6%	•		•			•	
4 Transport	8.9%			•				•
5 Communication services	7.2%			•				•
6 Consumer electronics	5.6%			•				•
7 Education	3.6%		•			•		
8 Healthcare	3.1%	•					•	
9 Financial services	2.5%			•				•
10 Skincare	1.5%			•			•	
11 Food and beverages	1.4%			•				•
12 Retail	1.3%			•			•	
13 Furniture	1.3%		•				•	
14 Clothing	1.3%			•		•		
15 Entertainment	1.3%			•			•	
16 Tobacco	0.1%			•		•		
17 Agro industrial Products	0.1%			•		•		
18 Personal products	0.1%			•			•	
19 Stationery	0.1%			•			•	
20 Other	0.0%							

Media Planning

Typical costs

(example: auto client)
Total budget: ￥256,500
Total Click Amount: 237,873

Click Rate: 0.23%
Total Impression: 104,596,688

Click Cost: RMB1.08
Time Range: 2006.9.15-2006.10.20

Typical keyword cost

Around 1.00 RMB (like auto, computer, etc)

Top sites

Sina--page impressions 20,000,000 (homepage)   Sohu   QQ--110-120 million users

Metrics

Generally CPC (eg, Baidu)   Cost per day (most portals)

Time and activities online

Location

Mostly work   35%   Mostly home   72%   Mostly cafés   30%

Activities online

General browsing	66.30%	Personal homepage/ space	24.30%
Search engine	66.30%	Blogging	23.70%
E-mailing	64.20%	Online recruiting	20.60%
Forum/ BBS	43.20%	Chatting room	19.90%
Instant messaging	42.70%	Banking	16.50%
Watching video & download	37.30%	E-magazine	16.50%
Playing podcasts	35.10%	Online education	12.40%
Online gaming	31.80%	Auction	11.30%
Shopping	26.00%		

Czech Republic

Media Planning

Typical costs	
CPT 200 - 2000 CZK (€7 - 70) at ratecard, which is negotiable	Varies by format, position, website category (the higher level of visits, the lower the CPT)

Keyword examples
1. Fixed cost based on the estimation of frequency of searching of a keyword: 2 000 - 20 000 CZK (€70 - 700) 2. Pay-per-click: 1 - 10 CZK (€0.04 - 0.4)

Top sites

	Users per month (in thousands)	% of internet users		Users per month (in thousands)	% of internet users
seznam.cz	3,423	91.6	mapy.cz	1,691	45.2
novinky.cz	2,213	59.2	super.cz	1,677	44.9
atlas.cz	2,027	54.2	lide.cz	1,192	31.9
centrum.cz	1,929	51.6	spoluzaci.cz	1,021	27.3
idnes.cz	1,722	46.1	sport.cz	943	25.2

Source: SPIR-Mediaresearch, NetMonitor (September 2006)

Metrics	
Brand advertisers use mainly CPM	Direct marketers use mainly cost-per-click

Time and activities online

Time spent online per day

Place	A 15-24	A 25-34	A 35-44	A 45-54	A 55+	A 15+
Home	0:38:29.6	0:32:46.6	0:31:55.5	0:26:58.0	0:24:28.8	0:33:17.2
Cyber café	0:34:18.6	0:31:01.5	0:28:42.5	0:22:20.8	0:24:45.8	0:32:17.2
Friend's home	0:34:02.1	0:30:23.8	0:33:46.6	0:23:48.8	0:27:00.0	0:32:10.6
School	0:30:10.3	0:26:38.5	0:23:16.7	0:15:15.9	0:15:16.2	0:28:58.6
Work	0:34:59.4	0:29:18.9	0:25:51.6	0:22:00.6	0:18:46.9	0:26:25.8
Other place	0:31:56.8	0:23:33.9	0:29:05.3	0:22:58.1	0:19:40.9	0:27:11.7

Source: SPIR-Mediaresearch, NetMonitor (September 2006)

Activities online

Activity	A 15-24	A 25-34	A 35-44	A 45-54	A 55+	A 15+	A 12-79
Searching for information for personal usage	932	785	647	466	272	3,102	3,387
E - mail	908	798	653	473	278	3,110	3,369
Searching for information about goods and services	854	790	639	463	274	3,020	3,220
Searching for information for study or work	860	665	575	409	214	2,724	2,979
News	753	683	576	407	235	2,655	2,808
Browsing without a goal	725	538	396	252	142	2,053	2,275
Searching and placing of classified ads on ad websites	556	554	428	304	154	1,996	2,079
Ordering or shopping on web	485	559	451	325	150	1,970	2,020
Discussion / chat / forum / ICQ	722	420	278	166	75	1,661	1,880
Downloading of music or video	635	396	221	112	53	1,417	1,581
Downloading of programmes	530	386	262	145	69	1,393	1,513
On-line gaming	572	327	170	102	42	1,212	1,420
Downloading of games	516	321	177	91	33	1,139	1,287
Total	1,334	1,663	1,417	1,432	2,507	8,353	8,765

Source: SKMO-GfK Praha/Median, Media Projekt (01.04.2006 - 30.09.2006)

France

Categories

Product category	Estimated % of media investment (gross) which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Telecommunications	20	•						•
2 Travel and tourism	30	•						•
3 Services	13	•						•
4 Distribution	6		•				•	
5 Transport	6		•			•		
6 IT	28	•				•		•
7 Culture and leisure	7		•			•		
8 Hygiene and beauty	6		•			•		
9 Publishing	6		•			•		
10 Information media	3			•		•		
11 Sports equipment and clothing	27			•				•
12 Drinks	5		•	•		•		
13 Food	1		•	•		•		
14 Audiovisual/photo/cinema	14		•				•	
15 Clothes, accessories, textiles	2		•			•		
16 Energy	7		•			•		
17 Medicine and pharmacy	4		•			•		
18 Corporate	8		•			•		
19 Cleaning	3		•			•		
20 Household appliances	6		•			•		

Media Planning

Typical costs

CPT   from 3€ to 10€   CPL   0,5€ to 2€

Keyword examples

From 0,3 € to 2,5 €

Examples		**Examples**	
Credit	1.7 €	Gifts	0.5 €
Travel	2.5 €	ADSL	1.4 €
Holidays	1.0 €		

Top sites

Top 20 site brands

Brand	Unique Audience (000)
Google	21.042
Orange	17.53
Free	17.183
MSN/Windows Live	16.899
Yahoo!	14.538
Microsoft	14.065
PagesJaunes	13.785
eBay	12.476
Mappy	12.043
Voila	11.701
TF1 Network	10.239
Lycos Europe	10.12
Wikipedia	10.037
L Internaute	9.832
01net. Network	9.253
Fnac	9.203
Alice	9.079
voyages-sncf.com	9.054
Cdiscount.com	8.451
La Redoute	8.389

Top 20 domains

Domain	Unique Audience (000)
google.fr	20.293
orange.fr	17.232
free.fr	17.178
msn.com	14.023
pagesjaunes.fr	13.815
live.com	12.828
google.com	12.499
ebay.fr	12.193
mappy.com	11.912
voila.fr	11.692
msn.fr	11.503
yahoo.fr	11.487
microsoft.com	10.988
wikipedia.org	10.037
linternaute.com	9.754
01net.com	9.099
voyages-sncf.com	9.054
fnac.com	8.747
lycos.fr	8.607
cdiscount.com	8.451

Nielsen Netratings - Home & Work - Quarter Ending October 2006

Metrics

Cost per impression (CPM - cost per thousand impressions)
is the main metrics in terms of buying for awareness campaign
Cost per click is the main one for direct response campaign (driving trafic)

Cost per acquisition is also used for DR/CRM campaign.
Hybrid metrics are being used more as the choice of objectives grows
We also use reach, frequency and GRP for strategic analysis

New metrics in development

Cost-per-thousand impressions in in-game, CPT contacts for SMS/MMS

France, continued

Time and activities online

Time online (minutes per day)						
Age **2-11**	**12-17**	**18-24**	**25-34**	**35-49**	**50+**	
Home 0:21:52	1:31:12	1:20:13	1:47:47	1:36:24	1:41:24	

Nielsen Netratings - Last quarter 2006 (end October 2006)

Activities online			
E-mails	93%	Radio listening	31%
Banking	60%	Personal website	24%
Purchase	59%	Video, Music Downloading	23%
Instant messaging	52%	Forums	20%
Software Downloading	43%	TV, radio shows Downloading	11%
Real estate website	35%	Blog creation	9%
Employment website	32%		

Source : TNS SOFRES, Sep 2006, all 18+ online

Categories

	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Services	10.2%	•						•
2 Office/IT/communication	8.0%	•						•
3 Telecommunication	7.4%	•						•
4 Mobile phones	7.2%	•						•
5 Insurance	6.0%		•				•	
6 Finance	5.6%		•			•		
7 Tourism	3.8%	•						•
8 Consumer electronics	4.0%			•			•	
9 Auto	3.2%		•				•	
10 Photo & Optical	2.3%			•		•		
11 Retail and Mail Order*	2.1%	•					•	
12 Media	1.4%				•	•		
13 Personal care	1.3%			•		•		
14 Wellbeing & Pharmacy	0.9%			•		•		
15 Beverages	0.8%				•	•		
16 Food	0.3%			•		•		

Main communications objective(s) spans the Direct response, Soft response, Brand awareness and Customer loyalty columns. *Trend for 2007 online spend* spans the Below all-online average, At all-online average and Above all-online average columns.

* These are recorded as one but are quite different

Search not included. Online % shares would be much higher for the following categories if search was included: Office/IT/communication; telecommunication; mobile phones; insurance; finance; and tourism.

Nielsen (adspend data)

Media Planning

Typical costs		
CPT € 30 to 40	Cost per lead	Varies by client and value of product/service

Keyword example costs

€ 0.70 to 2.70+

Top sites

Service	Rank	Net reach in % of internet users (last three months)	Net reach in unique users (m)
T-Online	1	36.6	13.16
WEB.DE	2	30.9	11.13
Yahoo! Deutschland	3	28.0	10.07
MSN.de	4	27.9	10.03
GMX	5	22.2	7.98
1und1.de	6	21.6	7.78
Freenet	7	17.6	6.33
RTL.de	8	17.3	6.23
ProSieben.de	9	14.9	5.35
Map24	10	14.8	5.34
AOL	11	14.2	5.11
mobile.de	12	11.2	4.03
SPIEGEL ONLINE	13	11.0	3.96
MeineStadt.de	14	10.6	3.81
LYCOS	15	10.5	3.76
Bild.T-Online	16	9.2	3.33
CHIP Online	17	8.4	3.01
FOCUS Online	18	8.0	2.87
Wetter.com	19	7.9	2.83
Sport1.de	20	7.2	2.60

Source: AGOF Internet Facts 2006/II

Germany, continued

Time and activities online

Location	
	All Adults
Only at work	11%
Only at home	50%
At work and home	39%

Activities online	
	% of internet users
Email	87
Search	86
News (World)	60
Online Shopping	58
Online Banking	54
regional and local news	49
Sports results	36
Messenger	31
Chats, forum use	31
Cinema news, programme	31

Source: Agof Internet Facts 2006 I

Hong Kong

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Banking and finance	5	•		•			•	
2 Education	15			•			•	
3 Entertainment	3	•		•				•
4 Internet services	10	•	•	•			•	
5 Mobile phones and operators	8		•	•				•
6 Personal care products	3		•	•				•
7 Real Estate	1			•		•		
8 Skincare & Beauty	3	•	•	•				•
9 Sports wear	20		•	•	•			•
10 Travel	8	•	•	•				•

Media Planning

Typical costs

	CPM (HK$)
Portals	18
News Sites	20
Finance Sites	20
Business Sites	150
Technology Sites	100
Entertainment Sites	15

Keyword examples

Finance related	CPC ranges	from HK$2 to HK$70
Celebrity related	CPC ranges	from HK$0.5 to HK$5
Mobile / gadget related	CPC ranges	from HK$0.6 to HK$5
Travel related	CPC ranges	from HK$0.5 to HK$8

Top sites

Yahoo! HK	hk.yahoo.com/	Monthly Page View	800million
Sina HK	www.sina.com.hk	Monthly Page View	360million
Discuss.com.hk	www.discuss.com.hk	Monthly Page View	200million
Oriental Daily	www.orientaldaily.com	Monthly Page View	150million
Mingpao	www.mingpao.com	Monthly Page View	75million
TVB	www.tvb.com	Monthly Page View	69million
Appledaily	www.atnext.com	Unique Users Monthly	1.6million
MSN HK	www.msn.com.hk	Unique Users Monthly	5.5million

Metrics

Mainly CPC, CPM	Some advertisers use cost-per-acquisition	For rich media or video ad, interaction time & play duration are also used

Time and activities online

Time online

Hours spent online per day by users 2.4hrs	Work 1.2hrs	Home 2.16hrs	Cafés less than 1 hr

Activities online

	%		%
Email/ Fax	71	Download software	13
Browse Surf web pages	68	Search financial info.	13
Search goods/ services	47	Watch video	8
Read news/ magazines	42	Job searching	5
Online games	34	Ticketing	4
Instant Messenger	29	Netmeeting	4
Listen songs/ radio	23	Auction	4
Search/ downloadinfo.	19	Internet phone	3
E-payment	14	Purchase goods/ services	3
Internet banking	13	Trade stock	3

Source: Nielsen Media Index (Jul 2005 - Jun 2006)

All change: marketing in addressable media

Hungary

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Banking, insurance	8	•	•					•
2 Telecommunications	5	•						•
3 Automotive	7		•	•		•		
4 Travel	14	•						•
5 Food	3			•	•		•	
6 Real Estate	12		•				•	
7 IT	14		•	•		•		
8 Beverages	2			•		•		
9 Beauty	7			•		•		
10 OTC pharmaceuticals	2	•		•		•		

Media Planning

Typical costs		
Average cpm € 25.40	Average cpl € 89.80	

Keyword example
€ 1.60

Top sites

		Daily unique users
1	[origo]	1,306,553
2	Startlap	938,470
3	iWiW	927,438
4	Index	568,530
5	myVip	346,609

Metrics

We use mainly cost-per-impression, however in some cases we also use cost-per-click or cost-per-lead.
We are trying to initiate a shift towards cost-per-unique-users but media owners are resisting

Time and activities online

Time online (hours per day)

Work 1	Home 4	Cafés 3

Activities online

1	Email	4	Search
2	News	5	Online banking
3	Downloading	6	Chat

India

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Publications/books	<1 %			•		•		
2 Automobile (four wheel)	1%	•	•	•		•		
3 Educational institutions	<1%			•		•		
4 Cell phone services	1%			•		•		
5 Automobile (two wheel)	<1%			•		•		
6 Toilet soaps	<1%			•		•		
7 Shampoos	<1%			•		•		
8 Real estate	<1%			•		•		
9 Washing powder/liquid	<1%			•		•		
10 Cell phone	2%		•	•				•
11 Retail	<1%			•		•		
12 Toothpaste	<1%			•		•		
13 Soft drink	1.50%			•				•
14 Biscuits	<1%			•		•		
15 Insurance	4%	•		•		•		•
16 Fairness cream	<1%			•		•		
17 Tea	<1%			•		•		
18 Internet/VAS services	40%	•						•

Media Planning

Typical costs	
Average Cost Per Thousand	INR 150 -200 (USD 3.5 - 4.5)
Average Cost Per Lead (Financial Product like Personal Loan, Home Loan)	INR 120 -200 (USD 3.5 - 4.5)

Keyword example

INR 8-10 (USD 0.20 - 0.25)

Top sites

No independent data

Metrics

Cost per Impression (CPM)	Cost Per Click (CPC/ PPC)	Cost Per Acquisition/ Response (CPA)
E-mail: Cost per mail and Cost per Mail open	Video: Cost per Video View	Content association and Sponsorship: Fixed for a period

Time and activities online

Time spent online (last month)

	% of internet users		% of internet users
Home: Less than 5 hours	13.0%	Elsewhere: Less than 5 hours	28.0%
Home: 5 - 9 hours	6.0%	Elsewhere: 5 - 9 hours	6.3%
Home: 10 - 19 hours	3.2%	Elsewhere: 10 - 19 hours	4.6%
Home: 20+ hours	3.2%	Elsewhere: 20+ hours	5.2%

Activities online

	% of internet users
Communication : Use e-mail	34.0%
Search : Use Search Engines / Directories	16.0%
Communication : Use Messenger	13.0%
Communication : Visited a Chat room	10.0%
Content : Education	10.0%

Source: TGI India 2005
Base : Pop strata 100000+, Social Economic Class AB & C, Age 15-55

Indonesia

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Automotive	7		•		•	•	•	
2 Baby products	3			•		•		
3 Beverage	1.5			•	•	•		
4 Clothing & accessories	3	•		•			•	
5 Corporate & public services	2		•			•		
6 Education	4			•			•	
7 Financial Services	5	•		•	•		•	
8 Food	1			•	•	•		
9 Household Products	3	•		•			•	
10 Industrial	1	•				•		
11 Media & promotion	8.5		•	•	•			•
12 Medicine OTC	5		•	•	•			•
13 Office equipment	1.5		•			•		
14 Personal Services	1		•			•		
15 Property	3		•			•		
16 Recreation	2	•		•			•	
17 Retail	6	•		•		•		
18 Smoking & accessories	1		•	•	•		•	
19 Toiletries & cosmetics	6	•	•	•	•		•	
20 Travel	1	•	•			•		

Time and activities online

Average time active online

	Total	15-19	20-25	26-35	36-45	Place	Total	15-19	20-25	26-35	36-45
Total	100%	16%	18%	38%	28%	Total	100%	16%	18%	38%	28%
Less Than 1 Hour	100%	31%	13%	29%	27%	Home	100%	21%	16%	46%	17%
1 - 3 Hours	100%	30%	20%	46%	5%	Friend's Home	100%	36%	36%	26%	1%
3.1 - 5 Hours	100%	55%	8%	31%	6%	Office	100%	9%	18%	63%	10%
5.1 - 7 Hours	100%	51%	2%	42%	5%	Internet Cafe	100%	26%	28%	36%	10%
7.1 - 9 Hours	100%	100%	0%	0%	0%	Anytime (HP/PDA)	100%	15%	43%	38%	4%
9.1 - 11 Hours	100%	-	-	-	-	School/College/University	100%	39%	27%	28%	6%
More Than 11 Hours	100%	0%	0%	100%	0%						

Activities

	Total	15-19	20-25	26-35	36-45
E-shopping	100%	88%	0%	0%	12%
E-learning	100%	77%	23%	0%	0%
Sending SMS	100%	58%	15%	25%	2%
Looking for financial news	100%	58%	33%	3%	5%
Download movies	100%	56%	14%	26%	4%
Sending greetings	100%	55%	4%	38%	3%
Downloading games	100%	52%	13%	21%	14%
Auctions	100%	51%	49%	0%	0%
Create/edit blog	100%	46%	26%	21%	7%
Travel related	100%	38%	26%	36%	0%
Play games online	100%	38%	18%	40%	4%
Online news	100%	36%	11%	40%	13%
Join/Visit social network	100%	35%	24%	31%	9%
Chat	100%	34%	23%	34%	8%
Sports news and info	100%	33%	12%	46%	9%
Download music	100%	32%	25%	32%	12%
Browsing (study-related)	100%	31%	26%	29%	13%
Online journal search	100%	24%	20%	36%	20%
Instant messaging	100%	23%	46%	28%	2%
Email	100%	23%	25%	44%	7%
Research products/services	100%	23%	20%	50%	7%
Download Files/software	100%	22%	35%	28%	15%
Browse adult websites	100%	20%	43%	33%	4%
Internet banking	100%	18%	3%	51%	29%
Browsing (work-related)	100%	13%	13%	67%	7%
Share trading	100%	11%	35%	0%	54%
Researching health advice	100%	1%	21%	57%	21%

All change: marketing in addressable media

Italy

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Finance/insurance	6	•						•
2 Telecomms	2		•				•	
3 Leisure	13		•					•
4 Media/publishing	3			•				•
5 Travel	9	•						•
6 Cars	1		•				•	
7 IT/photo	13		•					•
8 Professional services	7			•				•
9 Institutions	4		•					•
10 Classified	4	•						•
11 Retail	2				•		•	
12 Toiletries	1				•		•	
13 Personal care	1				•		•	
14 Beverages	1				•		•	
15 Household care	1				•	•		
16 Clothes	1		•			•		
17 Food	0.4				•	•		
18 Pharma	1			•		•		
19 Audio video	6		•					•
20 Motorcycles/cars	2		•					•
21 Construction	1			•		•		
22 White goods	1		•			•		
23 Home	0.3		•			•		
24 Games/school	2			•		•		
25 Personal objects	0.4			•		•		

Media Planning

Typical costs		
CPM from 5 to 9 €	CPC 0.50€ min	CPL 6.5 min

Keyword example
From 0.5 to 2€ CPC

Top sites

Domain	Unique audience (000)	Domain	Unique audience (000)
alice.it	9,185	corriere.it	3,200
libero.it	9,146	repubblica.it	3,187
yahoo.it	5,935	leonardo.it	3,054
msn.it	4,885	rai.it	2,750
tiscali.it	3,922	kataweb.it	2,455

October 2006
Source NNR

Metrics

CPM/CPC

Time and activities online

Time online (minutes per day)		
Work 25	Home 30	Cafés negligible

Activities online

On line Interests	% on Total Internet Audience + 14 y.o.	Sites Category	Unique Audience (000)	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
Travel	40%	Search engines/portals & communities	16977	86	18	1:30:52
News	39%	Telecom/internet services	15395	78	16	3:11:23
Useful information	33%	Computers & consumer electronics	14799	75	14	2:09:50
IT	29%	Entertainment	13566	69	12	2:02:30
Music	25%	News & information	12198	62	9	0:39:28
Sport	21%	Multi-category commerce	10208	52	7	1:12:53
Tech	21%	Government & non-profit	9969	50	5	0:28:57
Commercial	20%	Travel	9383	47	4	0:26:15
Local information	16%	Finance/insurance/investment	8505	43	7	1:04:36
Maps	16%	Education & careers	8500	43	5	0:27:02
Books	15%	Corporate information	6636	34	4	0:15:19
Job training	15%	Family & lifestyles	6387	32	3	0:28:45
Cinema	15%	Home & fashion	4772	24	2	0:11:07
Telephone numbers	14%	Automotive	4277	22	3	0:18:40
Shows/exhibitions	11%	Special occasions	1775	9	2	0:05:00
Job search	11%					
Cars	11%	*Source NNR October 2006*				
Banking	11%					
Audio	10%					
Health	9%					
Games	8%					
TV	7%					
Financial information	7%					
Politics	5%					
Food and cooking	5%					
Radio	5%					
Theatre	4%					
Fitness	4%					
Celebrities	4%					
Stock exchange	3%					
Fashion	3%					
Beauty	2%					
Horoscopes	1%					

Source: Eurisko New Media 06.1

Japan

Categories

Product Category	Share of online of media investment	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Cosmetics & toiletries	3%	•			•			•
2 Finance/insurance	12%	•	•			•		•
3 Food	1%			•			•	
4 Transportation/leisure	3%	•	•				•	
5 Drink/tobacco	3%	•		•	•			•
6 IT/communication	9%		•	•		•		•
7 Automotive	7%		•	•	•			•
8 Real Estate/housing	9%	•			•			•
9 Hobby/sports	4%			•			•	
10 Education/medical/religion	4%		•				•	
11 Restaurant/WebService	16%	•	•		•	•		
12 Fashion/accessories	2%	•		•			•	
13 Electric/appliance	3%		•	•			•	
14 Others	1%	-	-	-	-		•	

Media Planning

Keyword opening bids at 2 November 2006

Career change	800JPY	Consumer Finance	1,500JPY
Auto insurance	1,400JPY	Home buying	1,000JPY

Top sites

Data Type — Home Panel Data
Period — 28 Aug to 1 Oct 2006
All individuals — All
Page views in 000s

	Domain Name	Page views	Unique Visitors	Reach	Category
1	yahoo.co.jp	18076792	92164	83.4	Portal
2	mixi.jp	2386087	10201	9.2	SNS
3	google.co.jp	2015202	23688	21.9	Portal
4	rakuten.co.jp	1966122	34579	31.3	Shopping
5	infoseek.co.jp	980724	29485	26.7	Portal
6	msn.com	762362	22981	20.8	Portal
7	nifty.com	721280	33448	30.3	ISP
8	goo.ne.jp	718763	28627	25.9	Portal
9	biglobe.ne.jp	614231	28219	25.5	ISP
10	fc2.com	622073	27796	25.1	Blog
	Total	28863636	331188		

Metrics

Cost per 000 impression	Click to action ratio
Cost per clicks	ROI (invest cost / sales)
Cost per sales	Cost per sales ratio x no.of action
Cost per Action	Each conversion ratio
Cost per unique visitor	

Time and activities online

Location

Home only 34%	Home and work/school 35%	Work or school only 19%	Mobile phone or device only 12%

Time online

Hrs A Day Use Internet-Weekdays

		Total	12 to 19	20 to 29	30 to 39	40 to 49	50 to 59	60 to 69
Total	**Row %**	100%	0%	17%	35%	23%	20%	4%
	Unweighted Numbers	537	2	91	187	124	109	24
Less Than 15 Minutes		48	0	10	16	8	13	1
15-30 Minutes		89	1	16	35	19	14	4
30-60 Minutes		139	0	23	51	30	30	5
1-2 Hours		110	0	18	33	33	21	5
2-3 Hours		52	0	8	20	13	10	1
3-5 Hours		18	1	3	6	6	2	0
5-7 Hours		9	0	1	4	2	2	0
7-10 Hours		6	0	1	4	0	1	0
More Than 10 Hours		6	0	2	2	1	1	0
Hardly Use		55	0	9	15	12	13	6
Unknown		5	0	0	1	0	2	2
Average (Hours)		1.3	2.2	1.3	1.4	1.3	1.2	0.7

At home

Hrs A Day Use Internet-Weekdays

		Total	12 to 19	20 to 29	30 to 39	40 to 49	50 to 59	60 to 69
Total	**Row %**	100%	12%	21%	27%	18%	15%	7%
	Unweighted Numbers	1,336	167	284	357	242	194	92
Less Than 15 Minutes		137	11	27	28	36	25	10
15-30 Minutes		223	28	45	63	38	31	18
30-60 Minutes		327	32	67	95	56	48	29
1-2 Hours		253	31	56	61	51	37	17
2-3 Hours		113	20	27	34	15	12	5
3-5 Hours		42	8	10	10	9	5	0
5-7 Hours		13	1	4	6	1	1	0
7-10 Hours		10	3	3	3	0	1	0
More Than 10 Hours		8	2	3	2	1	0	0
Hardly Use		201	30	40	52	35	33	11
Unknown		9	1	2	3	0	1	2
Average (Hours)		1.1	1.3	1.2	1.1	0.9	0.9	0.7

Cyber café

Hrs A Day Use Internet-Weekdays

		Total	12 to 19	20 to 29	30 to 39	40 to 49	50 to 59	60 to 69
Total	**Row %**	100%	13%	60%	27%	0%	0%	0%
	Unweighted Numbers	30	4	18	8	0	0	0
Less Than 15 Minutes		1	0	1	0	0	0	0
15-30 Minutes		3	0	2	1	0	0	0
30-60 Minutes		3	0	2	1	0	0	0
1-2 Hours		9	1	7	1	0	0	0
2-3 Hours		-	0	0	0	0	0	0
3-5 Hours		1	1	0	0	0	0	0
5-7 Hours		1	0	1	0	0	0	0
7-10 Hours		1	0	1	0	0	0	0
More Than 10 Hours		1	0	1	0	0	0	0
Hardly Use		10	2	3	5	0	0	0
Unknown		-	0	0	0	0	0	0
Average (Hours)		1.5	1.4	2.1	0.3	-	-	-

Data source: 2005 3D

Activities online

	Total	Male%	Female%			Total	Male%	Female%
Total	100%	100%	100%		**Total**	100%	100%	100%
Unweighted Numbers					**Unweighted Numbers**			
Weather forecast/timetable etc.	37%	40%	33%		Viewing/listening to TV and radio	5%	7%	3%
Concert/movie/shop info	18%	16%	20%		Watching Movies/other video	5%	5%	4%
Ticketing and hotel reservation	16%	18%	13%		Chatting	5%	5%	4%
Online shopping	11%	13%	10%		Constructing home pages	5%	6%	3%
Browsing/posting messages	11%	13%	10%		Playing network games	4%	6%	2%
Purchasing and reserving CDs/ books	11%	12%	10%		Downloading ringtones and images	4%	5%	3%
Auctions	10%	12%	9%		Buying insurance	4%	5%	2%
Reading E-mail magazines	10%	11%	9%		Purchasing and reserving cosmetics	3%	1%	5%
Applying for prize offers/giveaways	10%	9%	10%		Share dealing	3%	5%	2%
Downloading software	10%	15%	4%		Participating in mailing lists	3%	4%	2%
Getting coupons	9%	8%	10%		Constructing blog	2%	3%	2%
Downloading games	5%	7%	3%		Affiliate programs	1%	1%	1%
Downloading music	5%	7%	3%		Social networking	1%	1%	0%
					Other/unknown	9%	9%	8%

Data source:2005 3D data

Malaysia

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Travel	4	•	•	•				•
2 Telecommunications	2		•	•	•			•
3 Mobile Phones	2	•	•	•				•
4 Automotive	2	•	•	•				•
5 Technology (Software & Hardware)	2	•	•				•	
6 Finance	1	•		•	•			•
7 Consumer Electronics	1		•	•			•	
8 Consumer Goods	1	•	•	•				•
9 Food & Beverages	<1	•	•	•			•	
11 Entertainment	<1		•	•		•		
12 Education	<1		•			•		

Media Planning

Typical costs
Average CPM = $8.02   Average CPC = $1.07

Keyword example
CPC - $0.60 TO $1.00

Top sites

1. The Star Online - 45m monthly pageviews, 2.9m monthly unique users
2. Cari.com.my - 35m monthly pageviews, 2.4m monthly unique users
3. SinChew-I.com - 200m monthly pageviews, 2.1m monthly unique users
4. Lelong.com.my - 16m monthly pageviews, 900k monthly unique users
5. Nst.com.my - 6.5m monthly pageviews, 320k monthly unique users
6. Utusan.com.my - 12m monthly pageviews, 235k monthly unique users

Metrics
Mainly CPM, CPC and CPA

Time and activities online

Time online (daily average)			
	age 15-19	Age 20-29	Age 30-39
If at work	1.2 hours	1.8 hours	1.7 hours
If at home	1.9 hours	2.0 hours	1.9 hours
If in cafés	1.5 hours	1.8 hours	1.5 hours

Source : 3D Malaysia 2006

Top 10 Activities online		
Age 15-19	Age 20-29	Age 30-39
Chat	E-mail	E-mail
E-mail	Chat	Research for Work
Research for School	Instant Messaging	Chat
Download Song/Music/MP3	Research for Work	General News Update
Entertainment/Lifestyle Info	Download Song/Music/MP3	Instant Messaging
Instant Messaging	Entertainment/Lifestyle Info	Download Song/Music/MP3
Play Games Online	General News Update	Travel Related Info
Sending SMS	Sending SMS	Sports News and Info
General News Update	Travel Related Info	Internet Banking
Research for Work	Play Games Online	Business News and info

Source : 3D Malaysia 2006

All change: marketing in addressable media

Mexico

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Auto	18%		•	•	•			•
2 Banks	24%		•	•	•			•
3 Consumer	8%							•
4 Entertainment	16%	•		•			•	•
5 Services	2%							•
6 Education	10%			•	•			•
7 Tourism	12%	•			•		•	•
8 Government	4%				•			•
9 Health	6%			•				•

Media Planning

Keyword example
0.05 usd to 0.075usd

Top sites

Prodigy Msn	Google	Reforma	You Tube	Podcast
Yahoo	Yahoo Search	El Universal	Hi5	
Terra		El Financiero	My Space	
Wanadoo		El Economista		
Click Diario		ESPN		

Metrics

CPM	CPC	CPA	CPR

Time and activities online

Frequency

Work 2 or 3 times per week	Home Daily	Cafés 2 or 3 times per week

Activities online

1 Instant messaging	6 Gaming
2 Email	7 Podcast
3 Streaming music, video	8 Purchase research shopping
4 Search	9 General browsing
5 Banking	

All change: marketing in addressable media

Netherlands

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Retail	1%	●				●		
2 Food	1%				●	●		
3 Media	10%		●					●
4 Financial services	6%	●						●
5 Telco/ICT	6%	●						●
6 Body care	1%				●	●		
7 Tourism Recreation	5%	●					●	
8 Transport/Automotive	2%			●			●	
9 Stimulants (alcohol/tobacco)	1%				●	●		
10 Industrial products	4%		●				●	
11 Business services	5%		●					●
12 Educational services and products	4%	●					●	
13 Detergents and cleaning products	0%		●		●	●		
14 Government	5%		●				●	
15 Pharma	0%		●			●		
16 Clothing and shoes	1%	●		●		●		
17 Consumer electronics	2%	●	●	●	●	●		
18 interior/furniture	0%	●				●		

Media Planning

Typical costs			
	CPM	CPC	CPL
B2C campaign for an airline	€ 3.00	€ 1.00	€ 7.43

Keyword examples		
	CPC	CPL
B2C campaign for an airline	€ 0.12	€ 1.57

Top sites

1 Startpagina.nl	6 Nu.nl
2 MSN Mesenger	7 Web-log.nl
3 Marktplaats.nl	8 RTL.nl
4 Hotmail	9 Zylom
5 Telefoongids.nl	10 Funda.nl

Time and activities online

Location			
At home 74.5	At work 32	At school 11.8	Other 19.2

Frequency

	At home	At school	At work	Other
1 day	4.6	1.9	3.6	7.5
2 days	5.4	3.1	3.5	7.4
3 days	7.4	5	5.4	8
4 days	6.3	5.4	5.9	6.4
5 days	11.6	9.2	15.2	7.8
6 days	9.9	10.9	11.8	8
7 days	52.3	62.5	53.8	48.3
< 1 day	2.5	2	0.8	6.7

All change: marketing in addressable media

Poland

Categories

	Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
			Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1	Finance	29%	●	●	●				
2	FMCG	20%	●	●	●				
3	Telecommunication	18%	●	●	●				
4	Transport	16%	●	●					
5	Technology	4%							
6	Others	16%							

Source: IAB

Media Planning

Typical costs

CPM rate card in Euro (1Euro = 3,85 pln)

Creative format / site	Interstitial	Layer ad, Shaped pop-up, pop-under	Expandable/ scrollbillboard; expandable/ scrollskyscraper; halfpage	Billboard, Rectangle, Navibox; Skyscraper, Scroller; Expandable/ scrollbanner	Banner up to 15 kB	Banner up to 5 kB
(Run-on-site)	€ 7.8	€ 6.5	€ 5.2	€ 3.9	€ 1.3	€ 0.6
Portal home page	€ 31.2	€ 26.0	€ 20.8	€ 15.6	€ 5.2	€ 2.6

Source: Onet; MindShare

Typical keyword cost

Key word - in Polish	Key word - in English	Average cost per click in PLN	Average cost per click in €o	Average daily number of clicks on onet.pl
Warszawa	Warsaw	0.95	€ 0.0025	610
Mp3	Mp3	0.8	€ 0.0021	560
Gry	Games	1.1	€ 0.0029	400
Praca	Job	0.9	€ 0.0023	380
Tapety	Wallpaper	1.55	€ 0.0040	318
Wierszyki	Rhymes	1.5	€ 0.0039	276
Pks	Coach transport	1.5	€ 0.0039	270
Pkp	Railway	1.5	€ 0.0039	261
Vv	Cv	1.5	€ 0.0039	255
Sms	Sms	1.5	€ 0.0039	244
Wiersze	Rhyme	0.9	€ 0.0023	243
Zdjecia	Pictures	0.9	€ 0.0023	214
Nokia	Nokia	0.7	€ 0.0018	196
Radio	Radio	0.8	€ 0.0021	190
Filmy	Movies	0.9	€ 0.0023	186
Allegro	Allegro (auction site)	1	€ 0.0026	181
Google	Google	1.5	€ 0.0039	180
Wp.pl	Virtual Poland (portal)	0.9	€ 0.0023	180

Top sites

	Site	Unique users	Impressions	Reach		Site	Unique users	Impressions	Reach
1	Google	10,487,792	1,723,909,825	83.29%	11	Orange	3,277,880	166,591,214	26.0%
2	Onet.pl	9,405,382	2,077,749,256	74.7%	12	TP	3,178,142	31,956,717	25.2%
3	Wirtualna Polska	8,272,655	1,210,977,427	65.7%	13	Grupa IDG	2,956,304	16,723,741	23.5%
4	Allegro.pl	6,728,058	2,367,438,118	53.4%	14	Youtube.com	2,758,906	86,349,164	21.9%
5	INTERIA.PL	6,676,369	642,551,700	53.0%	15	Plus GSM	2,623,027	87,805,868	20.8%
6	Microsoft	5,839,034	82,782,975	46.4%	16	Imageshack.us	2,382,527	36,844,952	18.9%
7	o2.pl	5,733,675	542,693,356	45.5%	17	OtoMoto	2,363,663	93,022,404	18.8%
8	Wikipedia.org	4,902,596	115,381,020	38.9%	18	PTC Era	2,346,772	112,583,155	18.6%
9	Gazeta.pl	4,624,401	360,447,388	36.7%	19	Osemka.pl	2,318,634	25,525,162	18.4%
10	Msn.com	3,586,307	50,162,050	28.5%	20	eBay	2,203,930	119,030,282	17.5%

Megapanel/Gemius IX 2006

Poland, continued

Media Planning, continued

Metrics	
CPC bought	Budget/clicks
CPC delivered	Budget/ delivered clicks
CTR	Clicks/impressions
CR	Actions/impressions
CPA	Budget/actions
CPT (cost per thousand)	Cost of 1000 impressions
CPT in TG	Cost per thousand in target group
Site Cost	Cost of buying all possible impressions on the site
Reach	Site reach in target group
GRP (Gross Rating Point)	% of target group seeing the impressions
CPP (cost per point)	Cost of reaching 1% of target group
CPRP (cost per reach point)	Cost of building 1% of reach
GRP from 1000	How much GRP is being delivered by 1000 impressions bought on site
Impr Per 1000 Bought	How many impressions we will get in target group for each 1000 impressions bought in population
Buy to 1 in TG	How many impressions you have to buy, to get 1 in target group
CPC in Population	Cost per click in population
Clicks From Stat	Available clicks in target group
CPC in Target	Cost per click in target group
Clicks Reach	Reach in target group of people who will click in the ad
CPC Reach point	Cost per reach (reach building) of 1% of target group who will click in the ad
Clicks GRP	% of target group who we will reach and who will click in the ad
Clicks CPP	Cost per click by 1% of target group on given site
Clicks Per 1000 imp	Clicks in target group for every 1000 impressions bought
Buy to 1 Click in TG	How many impressions you have to buy, in order to get 1 click in Target Group

Time and activities online

Time online				
45 min per day				

% of population and Internet Users by age

	15-24	25-34	35-44	45-54	over 54 years
Internet Users	39.38%	24.60%	15.99%	13.73%	6.29%
Population	20.48%	19.21%	16.00%	19.66%	24.65%

Source: SMG/TGI Q1 2006

How often do you use Internet?

Not often than once a month 1.29%	**Once a month 2.4%**	**Several times a month 6.58%**
Once a week 10.16%	**Sereral times a week 21.1%**	**Every day or almost every day 58.47%**

Source: SMG/KRC Net Track, X 2005 - IX 2006

Activities online

Research	37.7%	Gaming	8.5%
E-mail	26.7%	Auction	7.7%
SMS	16.2%	Radio, podcasts	7.5%
mp3 downloads	14.0%	Forums	6.0%
Downloading/uploading of files (FTP)	13.6%	Placing ads	5.5%
Instant messaging	12.6%	Booking	5.0%
Banking	9.7%	Job searching	4.9%
Shopping	9.7%	IRC, ICQ	4.0%
Movie/video downloads	9.4%	Other	1.4%

Source: SMG/KRC TGI III-IX 2006

Portugal

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Financial	5.0%	●	●	●				●
2 Automotive	4.5%	●	●	●				●
3 Telecommunications	4.2%	●	●	●			●	
4 E-commerce	4.0%	●		●	●			●
5 Gaming	3.1%	●		●	●		●	
6 Pharmaceuticals	3.1%		●	●			●	
7 Cosmetics	3.0%		●	●			●	
8 Beverage	2.7%		●	●			●	
9 Dairy products	2.5%		●	●			●	
10 Distribution	2.0%	●	●	●			●	

Media Planning

Typical costs	
CPT = 5€	CPL = 15€

Keyword examples	
15 €	0,7€ for Google

Top sites	
www.sapo.pt	www.publico.pt
www.iol.pt	www.abola.pt
www.clix.pt	www.record.pt
www.xl.pt	

Metrics
Cost per Impression

Time and activities online

Hours spent online per day by users

At work		**n.a**					
		4/14	**15/24**	**25/34**	**35/44**	**44+**	**Total Users**
At home	hrs	0.84	0.88	0.90	0.92	0.85	0.92
	mns	50	53	54	55	51	55
In cyber cafés		**n.a**					

Online activities in order of popularity

E-mail	Online Radio
Instant Messaging	Live messaging/chatrooms
Downloads	Onlime Gaming
Home Banking	News groups

Source: Marktest / Netpanel

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Auto (representative offices)					●			
2 Auto (dealers)		●						
3 Telecommunications				●				
4 IT (hard and soft)					●			
5 Beer and soft drinks				●				
6 Retail				●	●			
7 Finances and insurance		●			●			
8 Construction and realty		●			●			
9 Audio and video				●				
10 Household appliances				●				
11 Cosmetics				●				
12 Mass media				●				
13 Sport				●				
14 Food				●	●			
15 Movies and musicals		●		●				
16 Tobacco				●				

Media Planning

Typical costs

Portals ~ $3-$7 per 1000 impressions (standard banners)

Thematic sites:

Auto	~ $25 per 1000 impressions (standard banners and Rich Media)
Women's	~ $5-10 per 1000 impressions (standard banners); $28 per 1000 impressions (Rich Media)
Sport	~ $25 (standard banners); $30 per 1000 impressions (Rich Media)
Game	~ $3-$5 per 1000 impressions (standard banners); $25 per 1000 impressions (Rich Media)
Lifestyle	~ $30 per 1000 impressions (standard banners); $50 per 1000 impressions (Rich Media)
News	~ $15-$25 per 1000 impressions (standard banners)
Business/finance	~ $20-$30 (standard banners); $25 per 1000 impressions (Rich Media)

Keyword examples

Average price for context advertising $40 per 1000 impressions on Rambler.ru   Average price for context advertising from $0.2+++ on Yandex.ru

Top sites

Categories	Impressions a day (home page)	Unique users a day (home page)	Categories	Impressions a day (home page)	Unique users a day (home page)	Categories	Impressions a day (home page)	Unique users a day (home page)
Portals			**News**			**Lifestyle**		
yandex.ru	12,000,000	3,000,000	rbc.ru	630,000	130,000	afisha.ru	51,000	28,000
mail.ru	13,500,000	3,000,000	lenta.ru	300,000	100,000			
rambler.ru	6,500,000	2,000,000	gazeta.ru	190,000	65,000	**Business/finance**		
			newsru.com	210,000	73,000	vedomosti.ru	25,000	10,000
(October 2006)			inopressa.ru	12,000	7,000	kommersant.ru	32,000	17,000
						expert.ru	18,000	12,000

Metrics

Standard metrics are cost per 1000 impressions and cost per day/week/month   Cost-per-click

Time and activities online

Time online

No data

Activities online

	% of respondents		% of respondents
E-mail	94%	Sales through Internet	28%
Searching of information	94%	Transfer of fax messages through Internet	19%
File exchange	83%	Organization of digital trade squares	16%
Purchases through Internet	29%	E-commerce	15%

Singapore

Categories

Product category	Estimated % of media investment which goes online	Direct response	Main communications objective(s) Soft response (e.g. more information)	Brand awareness	Customer loyalty	Trend for 2007 online spend Below all-online average	At all-online average	Above all-online average
1 Consumer Tech	8%	●	●	●				●
2 Banking/Finance	5%	●	●		●		●	
3 Travel	6%	●						●
4 Auto	1%		●			●		
5 FMCG	1%	●		●			●	
6 Government	2%			●			●	

Media Planning

Typical costs		
CPM: SGD 9.92	CPC: SGD 1.98	CPA: SGD 269.23

Keyword example

Popular keywords like the travel related keywords cost around SGD 3 CPC

Top sites

	Pageview		Pageview
http://sg.yahoo.com/	268,364,446.00	http://soccernet.espn.go.com/section?id=worldcup&cc=5739	16,207,000.00
http://www.google.com.sg/		http://www.asiaone.com.sg/index.html?a=1/	3,400,000.00
http://sg.msn.com/default.aspx	7,274,474.00	http://www.channelnewsasia.com/	63,593,100.00
http://www.friendster.com/	212,000,000.00	http://neopets.com/	

Metrics

Branding typically uses CPM; response CPC and CPA

Time and activities online

Principal location

At work 54%	At home 13%	In cafés 1%

Activities online

Email	52%	Online games	13%
Research (for work)	27%	E-learning	10%
Chat	25%	Download games	9%
Online news	20%	Download movies	9%
Download files/software	19%	Online journal entries	8%
Download music	16%	Share trading	6%
Researching products/services	16%	E-shopping	6%
Internet banking	15%	Adult websites	4%
Research (for school)	14%	Others	4%
Sports news and information	13%	Online Gambling	2%
Travel information	13%		

Source: 3D

Spain

Categories

#	Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
			Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1	Food	0.4				•	•		
2	Motoring	0.9			•			•	•
3	Drinks	0.3	•			•	•		
4	Beauty & Hygiene	0.4	•				•		
5	Building industry	0.9	•					•	
6	Cultural, Teach and Media communication	2.8		•				•	
7	Sport and spare time	1.2		•				•	
8	Retail and catering	1.4		•				•	
9	Energy	1.6		•					•
10	Office and commercial equipment	5.4		•				•	
11	Financial	7.1		•		•			•
12	Household	1.3				•	•		
13	Industrial and agricultural materials	3.6		•				•	
14	Cleaning Issue	0.0				•	•		
15	Personal Goods	0.9		•	•			•	
16	Healthy	0.2	•	•				•	
17	Public and Private Services	3.6	•	•					•
18	Tobacco	0.0				•		•	
19	Telecommunication and Internet	4.4	•	•	•	•			•
20	Clothing	0.3			•	•	•		
21	Transport, Travel and Tourism	2.2	•	•		•			•
22	Various	0.3							

Media Planning

Typical costs

Cost per thousand	€	Cost per thousand	€
Banner 468X60	22.00 €	Robapáginas 200X200	33.27 €
Super banner 728X90	27.44 €	Robapáginas 300X250	31.00 €
		Interstitial	53.90 €

* Client Net CPM Average by format of the most relevant publishers.

Keyword examples

KW	CPC	KW	CPC
Seguros	2.00 €	Viajes	0.40 €
Hipotecas	1.23 €	Offertas	0.35 €
Creditos	1.15 €	Billete de avion	0.31 €
Coches	0.53 €		

*Yahoo search price tool

Top sites

	Unique audience (000)	Page Views (000)
Google	10,396	1,356,501
MSN / Windows Live	8,715	1,089,020
Yahoo	5,211	322,810
Microsoft	4,911	89,102
Terra	4,472	274,453
YA.COM	3,316	79,890
Wanadoo	2,792	46,952

*Nielsen / NetRatings Sep06 (Home, +14)

Metrics

Advertising metrics used: Cost per Impact, %CTR, Cost per visit   New metrics: Cost per unique user, Post-click

Spain, continued

Time and activities online

Time online

		Minutes connected (total)	Minutes connected (home)	Minutes connected (out-of-home)
Total		**30**	**20**	**10**
Sex	Men	39	26	13
	Woman	21	13	8
Age	14 - 19	53	45	8
	20 - 24	58	44	14
	25 - 34	51	31	20
	35 - 44	34	20	14
	45 - 54	23	13	10
	55 - 64	10	7	3
	65 and more	1	1	0
Social class	High	80	48	32
	Upper Middle	53	32	21
	Middle Middle	32	22	10
	Lower Middle	13	10	4
	Low	5	3	1

EGM October 2005-May 2006

Activities in the last month

		Individuals	%			Individuals	%
1	Searches	55,925	98	13	Blog	16,677	29
2	Reading news	49,769	87	14	Adult sites	15,975	28
3	Street/map search	38,851	68	15	Research (for work)	15,447	27
4	Download software	33,128	58	16	Administration proceedings	15,257	27
5	Download music	32,122	56	17	Completing surveys	14,108	25
6	Weather	29,453	51	18	Sending greetings	12,927	23
7	Concert/theatre research	28,174	49	19	Sharing photos	12,797	22
8	Download films	24,894	43	20	SMS	10,974	19
9	Reseach financial information	22,769	40	21	Videoconferencing	7,281	13
10	Online gaming	22,139	39	22	Betting (sport)	7,229	13
11	TV guide	20,334	36	23	Ordering photo prints	4,156	7
12	Directory enquiry (phone)	20,271	35				

Source: 8º Survey AIMC to use internet. Oct 05'- Dic 05'

Sweden

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Auto	4%			•			•	
2 Mobile	3%				•			•
3 Telecom	15%	•					•	
4 Travel	8%	•						•
5 Banking	8%	•					•	
6 FMCG	2%		•				•	
7 Home electronics	3%		•			•		
8 Cosmetics	1%			•			•	
9 Home interior	4%			•		•		
10 Recruitment	5%	•				•		
11 Betting	6%	•				•		
12 Luxury products	1%			•			•	
13 Media	3%				•		•	
14 E-shopping	3%	•						•

Media Planning

Typical cost

CPT on Aftonbladet.se 75SEK= €8

Top sites

		Page imp.	Unique users	Category
1	msn.se	114,318,474	4,309,292	Portal
2	aftonbladet.se	65,132,736	3,783,261	News & Weather
3	blocket.se	218,598,666	2,754,537	Shopping&Auction
4	eniro.se	30,278,088	2,082,669	Directories & Search
5	expressen.se	43,604,778	1,850,094	News & Weather
6	hitta.se	14,732,150	1,606,343	Directories & Search
7	tidningsnätet	12,890,447	1,297,604	News & Weather
8	svt.se	20,749,011	1,154,314	TV
9	lunarstorm.se	297,321,330	1,098,065	Social Portal
10	SvD Nya medier	11,014,063	1,053,398	News & Weather

(sample from week 49 2006)

Metrics

CPT/CPM	CPC	CPL	CPA/CPO	Cost per unique user	Cost per week/CPD

Keyword examples

	CPC(Sek)	CTR		CPC(Sek)	CTR
(Telecom)			**(Retail)**		
Sms	5.61	2.96%	Kök	4	3.74%
Sms gratis	3.91	5.81%	Billiga kök	4.4	8.46%
Free sms	4.34	4.59%	Diskmaskin	4.62	4.62%
Ringsignal	3.79	11.31%	Vitvaror	4.3	6.02%
Gratis ringsignaler	2.6	12.07%	Gardiner	4.55	7.79%
Ringa billigt	6.78	5.54%	Textil	3.36	4.09%
Utlandssamtal	6.52	1.79%	Sovrum	2.36	6.38%
(Travel)			**(Insurance)**		
Billiga flygbiljetter	5.8	2.50%	Bilförsäkring	7.78	6.17%
Flygbiljetter	5.2	1.34%	Bil	7.43	1.23%
Flyg thailand	5.12	7.98%	Billig mc försäkring	9.27	8.33%
Sista minuten Thailand	4.66	9.02%	Försäkringsbolag	7.35	6.95%
Hotel stockholm	9.78	4.68%			
Billiga hotell	7.04	4.20%			
(Recruitment)					
Lediga jobb	3.94	8.57%			
Cv	1.57	9.43%			
It jobb	3.8	7.83%			
Bemanningsföretag	7.16	8.04%			
Recruitment	6.15	1.67%			

Sweden, continued

Time and activities online

Time spent online		
	Age 9-79	**Age 15-24**
At work	20 min	2 min
At home	60 min	100 min
In cyber cafés	0.5 min	0.5 min

Activities online	
1 General browsing	7 Watching video
2 Social networking	8 Gaming
3 Instant messaging	9 VoIP
4 Purchase research	10 Auction
5 Banking	11 Mobile TV
6 Shopping	12 Playing Podcasts

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Travel	35		•					•
2 Shopping	35		•	•				•
3 Telco	7			•				•
4 Food	3	•		•			•	
5 Computer & Consumer Electronics	10			•				•
6 Auto	8	•		•				•
7 Bank	3	•		•				•
8 Beauty	4	•		•			•	
9 Movie	8		•	•				•
10 Real Estate	4	•		•			•	
11 Finance	3	•					•	
12 Software	10	•		•				•
13 ISP	7	•						•
14 FMCG	3			•		•		
15 Online Game	20	•		•				•
16 Loan/Insurance	20	•						•
17 Health	2			•		•		
18 Online learning	35	•						•
19 Entertainment	5			•			•	
20 Children	2	•		•		•		

Media Planning

Typical costs
CPM: US$0.6 (direct response) $2 (Branding) CPC: US$1 ~ 2

Example keyword cost
$3 ~ 6

Top sites							
Yahoo	MSN	Pchome	Yam (Webs-TV)	Wretch	UDN	ChinaTimes	Ettoday

Metrics	
CPM	CPC

Time and activities online

Time online
43 hours/month

Activities online in order of popularity
General browsing, search, news reading, instant messaging, shoppping, auction, social networking, gaming, music streaming

Thailand

Categories

Product category	Estimated % of media investment which goes online	Main communications objective(s)				Trend for 2007 online spend		
		Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
1 Communication	8%			●				●
2 Corporate ads	5%			●			●	
3 Exhibition ads	1%			●			●	
4 Banking/Card	1%	●	●				●	
5 Home appliance	1%			●			●	
6 Skin care	1%			●			●	
7 Milk	1%			●			●	
8 Soft Drink	1%			●			●	
9 Moving picture	1%			●			●	
10 Alcoholic drink	1%			●	●			●
11 Cosmetics	1%			●			●	
12 Real Estate	1%			●				●
13 Passenger car	1%			●			●	
14 Pharmaceuticals	1%			●			●	
15 Soap	1%			●	●		●	
16 Music	1%		●	●				●
17 Detergent	1%			●			●	
18 Snack Biscuit	1%			●			●	
19 Commercial vehicle	1%			●			●	
20 Hair care	1%			●			●	

Media Planning

Typical costs	
200 THB CPM	30 THB CPC

Typical keyword	
Flight	30THB

Top sites

		Impressions per day				Impressions per day
1	www.sanook.com	254,428		6	www.siamza.com	75,400
2	www.kapook.com	148,482		7	www.playpark.com	74,308
3	www.manager.co.th	125,206		8	www.dek-d.com	71,837
4	www.teenee.com	98,271		9	www.asiasoft.co.th	65,569
5	www.mthai.com	78,876		10	www.pramool.com	63,187

Source : truehits.net

Metrics	
CPM	CPC

Thailand, continued

Time and activities online

Activities online in order of popularity				
	in % Age 12 - 19	in % Age 20-29	in % Age 30-39	in % Age 40+
E-mail	58	71	83	72
Listen to music	33	32	17	10
Play games	37	28	13	9
Access local news	13	28	32	35
Download software	21	27	38	24
Access education	48	22	7	22
Read E-newspaper	13	20	28	31
Access international news	8	17	26	30
Research product	5	15	19	15
Job hunting	5	15	11	8
Chatrooms	13	15	10	7
Research company	3	14	14	14
Watch movie/TV	8	11	9	8
Read E-magazine	9	10	11	11
Access classified ad	0	5	3	4
SMS	4	4	6	6
VOD music	3	4	1	1
Purchase product	1	4	4	5
VOD drama	4	3	2	1
News groups/bulletin	2	1	4	4
Video conferencing	1	1	0	1
Others	0	1	1	0
Online banking	0	1	4	8
Internet phone	0	0	2	1
Auctions	0	0	1	1
At home	22	36	54	66
At work	0	35	61	58
At College/university	76	17	0	0
At library	4	2	1	1
At friend's or relative's house	3	2	3	0
Internet cafe	17	28	9	3
Other place	0	0	0	0
30 mins or less	9	6	9	15
31-60 mins	28	23	26	28
1 - <2 hrs	33	27	27	25
2 - <3 hrs	20	28	18	17
3 - <4 hrs	5	8	9	8
4 - <5 hrs	2	2	2	2
5 - <6 hrs	0	2	1	2
6 - <7 hrs	0	1	2	1
7 hrs or more	0	3	5	2

Categories

Product category	Estimated % of media investment which goes online	Direct response	Soft response (e.g. more information)	Brand awareness	Customer loyalty	Below all-online average	At all-online average	Above all-online average
				Main communications objective(s)		**Trend for 2007 online spend**		
1 Automotive	5% - 15%			●				●
2 Financial Services	15% - 20%	●	●					●
3 Media & Ents	15% - 25%			●			●	
4 Travel	15% - 50%	●	●					●
5 Telecoms	10% - 15%	●		●				●
6 Technology	15 - 50%	●						●
7 FMCG	1% - 5%			●		●		

Media Planning

Typical costs
Costs vary too widely to give useful guidance

Top 20 Sites (February 2007, all users)

	Uniques (m)	Reach %		Uniques (m)	Reach %
Google	26.0	86.592	MSN-Windows Live Search	11.3	37.64
MSN-Windows Live	23.9	79.787	Wikipedia.org	11.2	37.189
Yahoo!	19.8	66.082	Amazon.co.uk	10.0	33.373
eBay.co.uk	19.8	65.814	AOL	9.8	32.496
MSN Hotmail-Windows Live Mail	17.9	59.798	Yahoo! Mail	9.7	32.469
MSN-Windows Live Messenger	15.6	51.945	Yahoo! Search	9.4	31.465
Google Images Search	14.3	47.737	Ask.co.uk	9.4	31.17
YouTube	11.7	38.863	MySpace.com	8.7	29.022
BBC TV	11.6	38.628	BBC News	8.6	28.556
Passport.com	11.5	38.192	MSN Search - UK	7.8	25.932

Source:comScore

Metrics
Our direct response clients use mainly CPC / CPA and our brand clients use CPM For measuring rich media advertising impact we look at interaction rates / duration if appropriate.

Time and activities online

Hours spent online per day by users		
At work n/a	At home Men 87 minutes; women 75 minutes	In cyber cafés n/a

Activities online in order of popularity

1 Emailing	6 Downloading / consuming audio content
2 Searching via search engine	7 Downloading / consuming video content
3 Instant messaging	8 Purchasing
4 Purchase researchnig	9 Gaming
5 Social networking	10 Banking / personal finances

Categories

Product category	Estimated % of media investment which goes online	Direct response	Main communications objective(s) Soft response (e.g. more information)	Brand awareness	Customer loyalty	Trend for 2007 online spend Below all-online average	At all-online average	Above all-online average
1 Computers	11.4%							
2 Telecommunications	6.4%	•						•
3 Travel	6.0%	•						•
4 Financial Services	5.2%							
5 Media	3.5%							
6 Consumer Electronics	2.4%							
7 Automotive	1.8%							
8 Retail	1.8%							
9 Pharma	1.2%							
10 Consumer packaged goods	1.0%			•				•
11 Shipping	0.6%							
12 Apparel	0.6%							
13 Restaurant	0.5%							
14 Toys	0.4%							

(We indicate only those fields for which we hold strongly positive views)

Media Planning

Typical costs

	Overall	b-2-b	Consumer	Local	Banners	Video
CPM	$8-10	$7-15	$5-10	$7-10	$8-20	$20-45
Typical rate for popular keywords	$2-3					

Top sites

AOL	CondeNet	Food.com	MSN	Washington Post	Yahoo!

Metrics

Brand attributes in gaming and mobile	Interactions	Retail Locater Request
Cost Per Gross Add (New Subscription)	Number of activities engaged	Time Spent
Cost Per Order	Online GRPs	Total Impressions
CPM	Redemptions of coupons	Views per person
Downloads	Response, Sales, ROI	Wireless downloads

Time and activities online

Hours spent online per day by users

Work 1.55   Home 1.34   Cafés n/a

Source: comScore Media Metrix, November 2006

Brand	Unique Audience [000]	Active Reach (%)	Universe Reach (%)	Rank	Web Page Views [000]	Web Rank	Sessions Per Person	Web Pages Per Person	Time Per Person (hh:mm:ss)
Google	108,371	69	51.21	1	17,521,922	3	16	162	1:06:49
Yahoo!	107,844	68	50.96	2	32,112,003	1	21	303	3:10:21
Microsoft	98,707	63	46.64	3	1,549,667	14	7	20	0:44:28
MSN/Windows Live	95,393	60	45.08	4	14,939,213	4	17	164	1:58:08
AOL Media Network	94,967	60	44.88	5	8,602,882	6	17	98	4:29:43
Fox Interactive Media	65,156	41	30.79	6	27,825,059	2	10	430	1:55:26
eBay	61,075	39	28.86	7	14,147,202	5	9	232	1:51:43
Wikipedia	46,383	29	21.92	8	837,407	25	3	18	0:16:14
YouTube	45,040	29	21.28	9	2,230,872	11	4	50	0:41:47
Real Network	44,049	28	20.81	10	253,131	89	5	12	0:34:54

Category	Unique Audience [000]	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)		Unique Audience [000]	Active Reach (%)	Sessions Per Person	Time Per Person (hh:mm:ss)
Telecom/Internet Services	138,774	88	30	5:47:05	Family & Lifestyles	103,625	66	8	1:14:10
Entertainment	132,079	84	20	4:47:20	Home & Fashion	96,693	61	8	1:05:40
Search Engines/Portals & Communities	145,585	92	34	3:49:14	Travel	87,571	55	6	1:03:20
Finance/Insurance/Investment	98,600	62	13	2:07:38	Corporate Information	94,040	60	7	0:53:59
News & Information	121,094	77	18	2:01:10	Government & Non-Profit	84,420	53	6	0:42:52
Multi-category Commerce	104,065	66	10	1:28:10	Automotive	51,704	33	4	0:37:28
Computers & Consumer Electronics	121,632	77	12	1:26:24	Special Occasions	55,321	35	4	0:24:08
Education & Careers	88,856	56	8	1:17:39					

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GroupM is the leading global media investment management operation. It serves as the parent company to WPP media agencies including MAXUS, MediaCom, Mediaedge:cia and MindShare.

Our primary purpose is to maximise the performance of WPP's media communications agencies on behalf of our clients, our shareholders and our people by operating as a parent and collaborator in performance-enhancing activities such as trading, content creation, sports, digital, finance, proprietary tool development and other business-critical capabilities. The agencies that comprise GroupM are all global operations in their own right with leading market positions.

The focus of GroupM is the intelligent application of physical and intellectual scale to benefit trading, innovation, and new communication services, to bring unfair competitive advantage to our clients and our companies.

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