

Local Search: Are Partnerships the Key to Success?

- **Bruce Crair**, President and Chief Operating Officer, Local.com
- **John Keister**, President, Marchex
- **Justin Sanger**, Founder and President, LocalLaunch

Moderator: John Kelsey, Chairman and Cofounder, The Kelsey Group, Inc.





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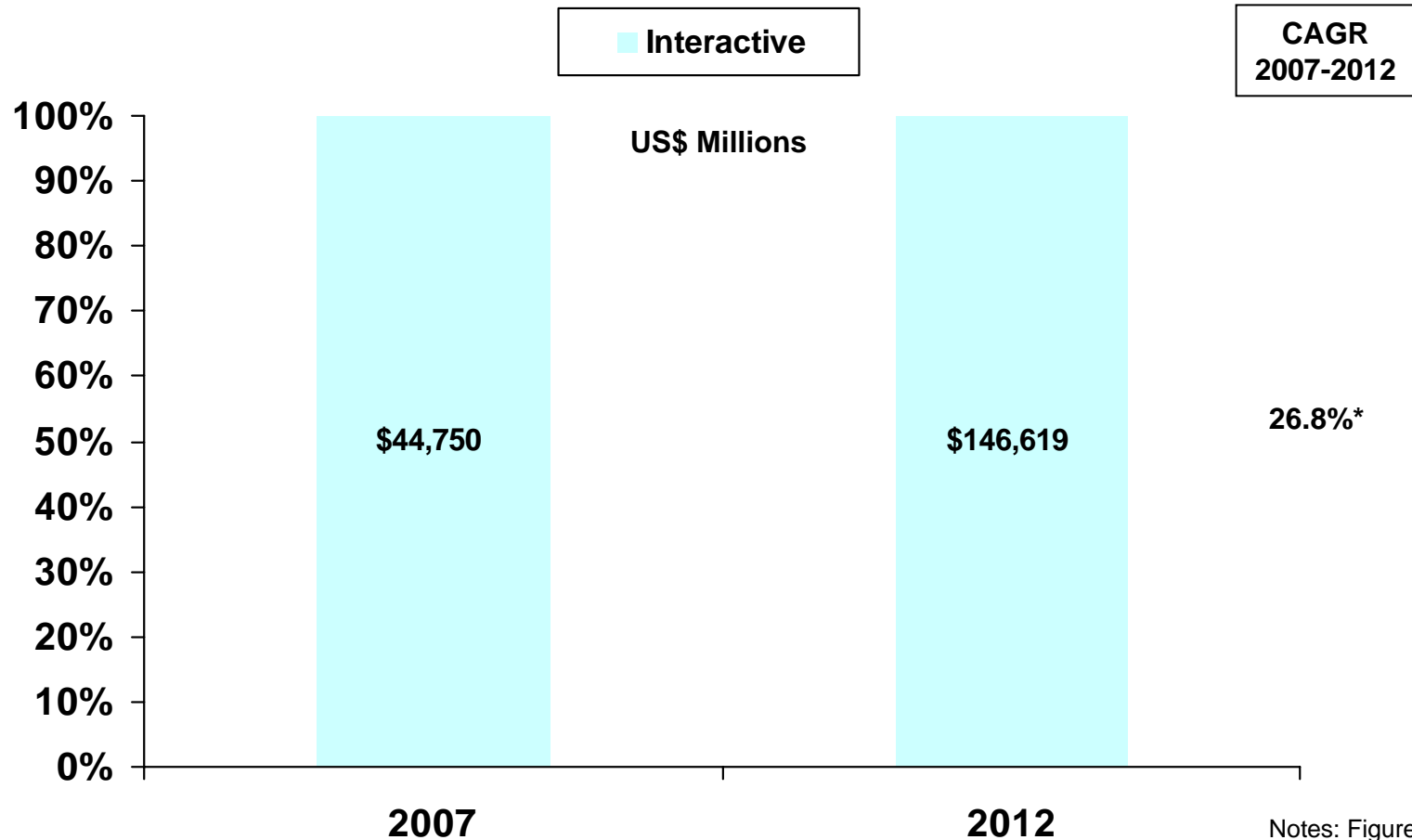
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Global Advertising

- The global advertising market will grow from US\$605 billion in 2007 to US\$707 billion in 2012, a 3.2 percent CAGR*.
- Over that time period, global interactive advertising will grow from US\$45 billion to US\$147 billion, a CAGR of 26.8 percent*.
- At year-end 2007, interactive advertising constituted 7.4 percent of the global ad market. By 2012 the interactive share of global ad spend will reach 21 percent.
- Interactive advertising comprises search (including local search), display advertising, classifieds and other interactive ad products (e-mail, lead generation, etc.).



Global Interactive: 2007 – 2012



Total revenues to grow from \$45B to \$147B

Notes: Figures are rounded. Interactive includes Search, Local Search, Display and Other.

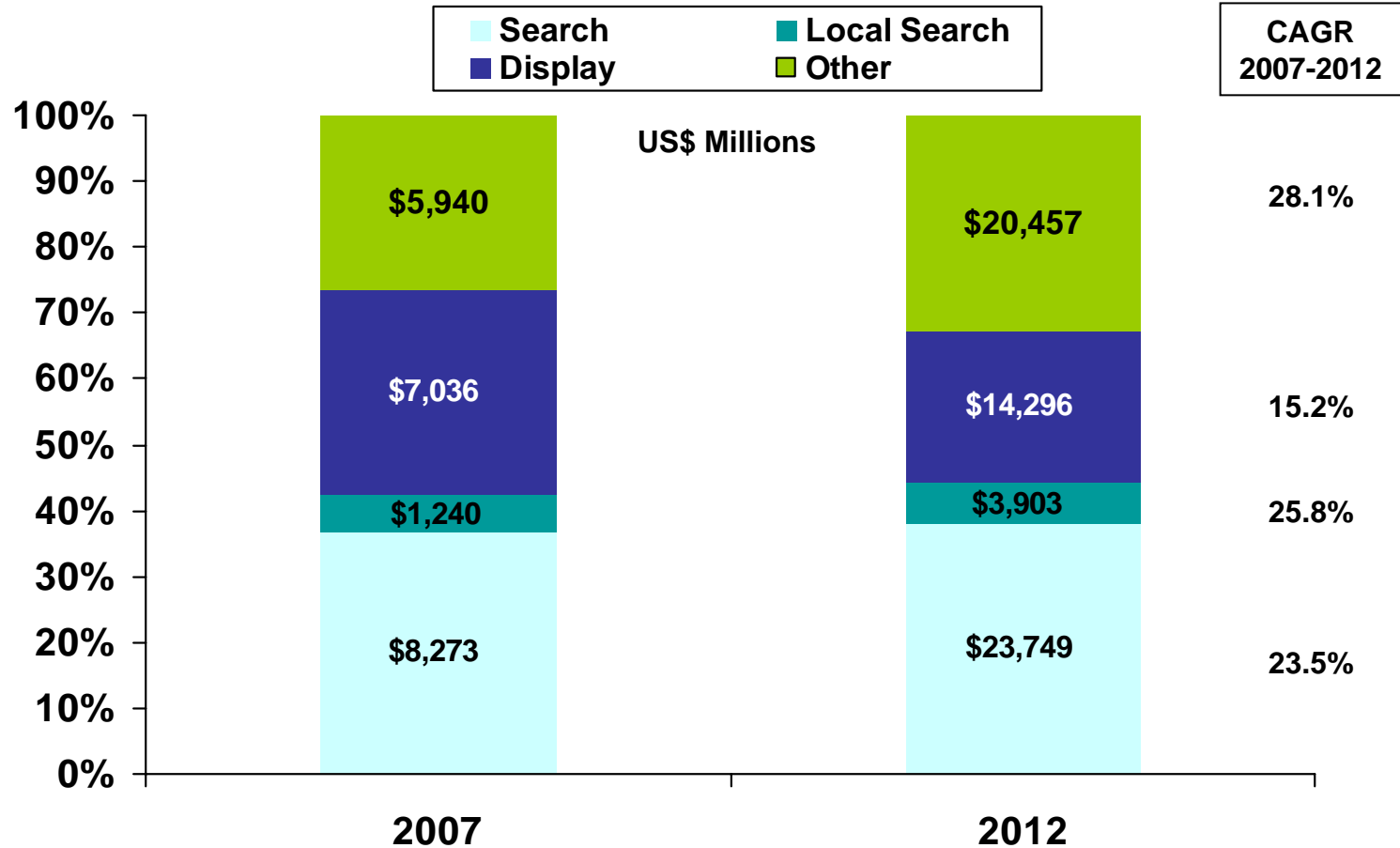


Global Local Search Advertising

- The Kelsey Group U.S. local search growth this year is estimated to be US\$3.9 billion.
 - Comparable years: 2011 from last year's forecast was US\$2.6B vs. this year's forecast for 2011 of US\$3.2B.
- TKG's Local Commerce Monitor showed 6 percent of SMBs surveyed in August 2006 used paid search products. By August 2007, this number was 9 percent.
- Causes: growth in reseller activity; Yellow Page sales forces; and, self registration.
- In 2009, TKG anticipates a strong acceleration of advertisers to ROI-based ad products through which they can measure results.



United States: 2007 – 2012



Total revenues to grow from \$22.5B to \$62.4B

Note: Figures are rounded.

