

Interactive Local Media:08

Santa Clara, Nov. 19-21



Sneak Preview with Kelsey's ILM:08 co-chairs:

- Matt Booth
- Mike Boland
- Peter Krasilovsky



Special Discount for Commandos!

- The Kelsey Group will provide a \$200 discount for all **Commandos**. This week only! Register at
- <https://www.kelseygroup.com/Register/registration.asp?CID=57>
- Use special code: “CommandoWebinar.”



Full Slate of Top Notch Speakers, Industry Research



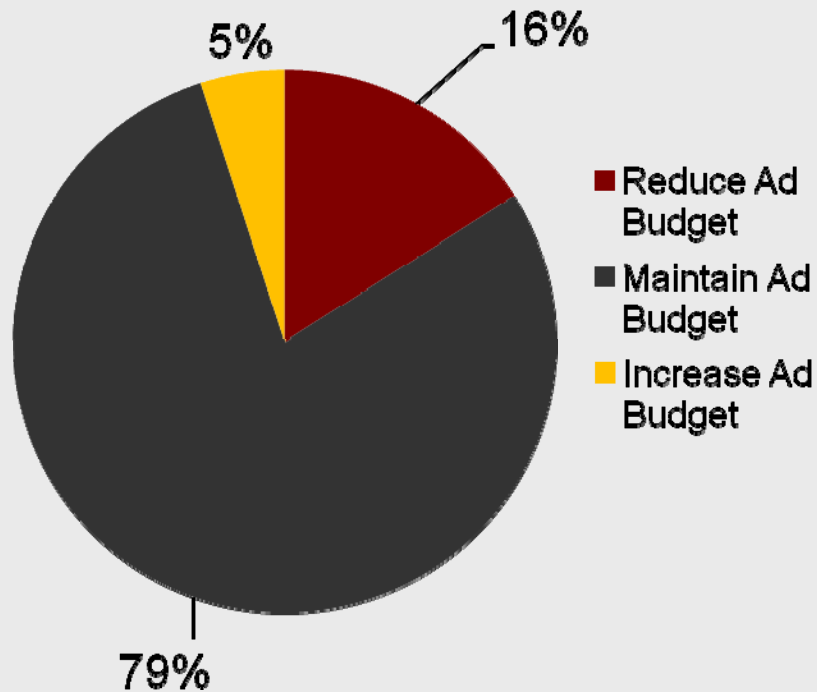
Some of our 46 featured speakers:

- Mark Canon, Yell.com
- Angie Hicks, Angie's List; Rodney Rice, ServiceMagic;
- Kevin Cuddihy, Comcast Spotlight; Larry Olevitch, NBC Local; Meredith Papp, Google
- Jeff Stibel, Web.com; Brad Inman, TurnHere
- Lem Lloyd, Yahoo; Mike Silver, The Newspaper Consortium
- Russ Fradin, Adify; Shawn Riegsecker, Centro; Jason Tafler, PointRoll
- Gordon Henry, Spotzer; Jon Rosen, SpotRunner
- Mike Liebhold, Institute for the Future; Kara Nortman, IAC

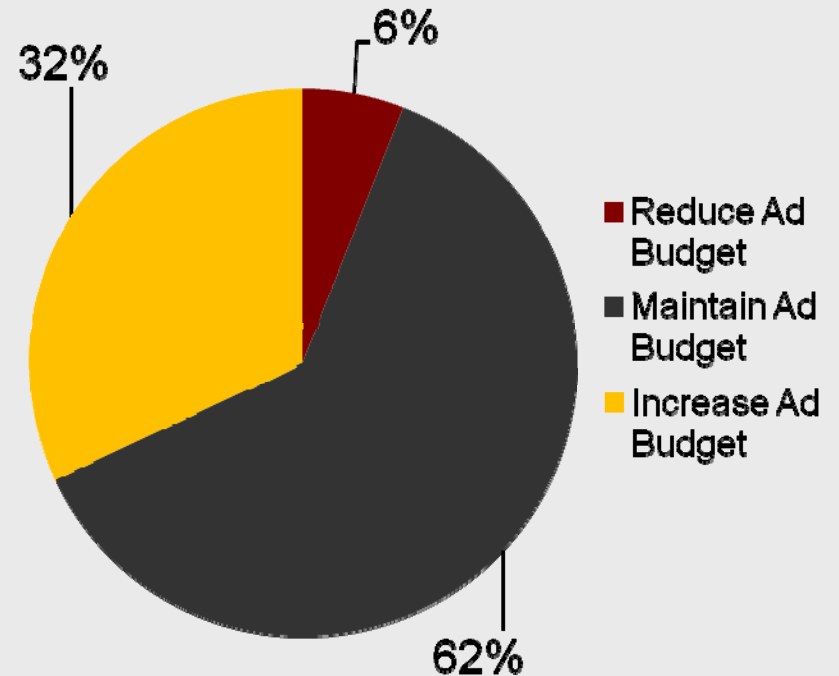


6 Years Really Does Make a Difference

**SMB Ad Spend Intentions
Wave V: March 2002**



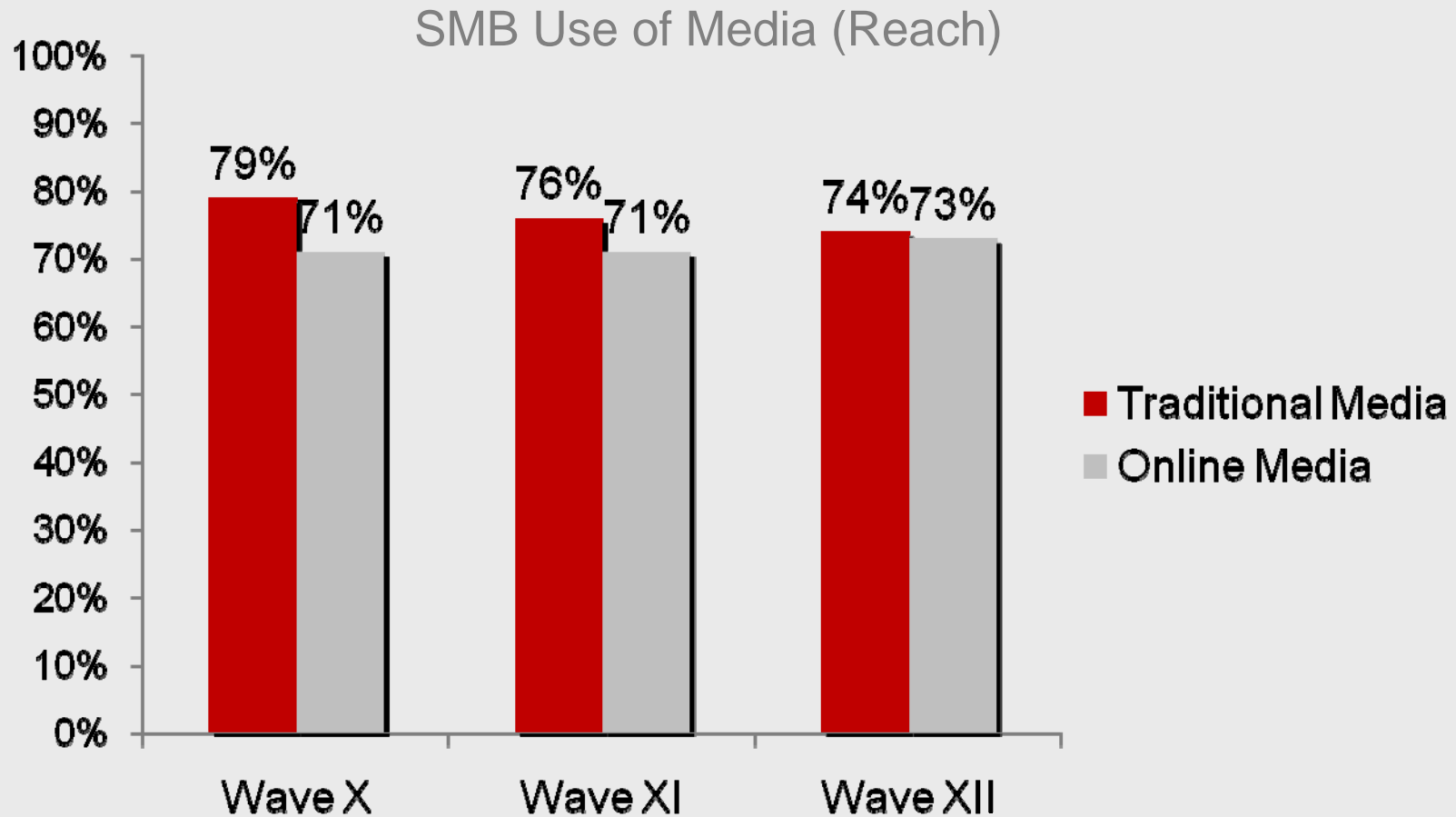
**SMB Ad Spend Intentions
Wave XII: Aug. 2008**



Sources: The Kelsey Group's Local Commerce Monitor Wave V (March 2002) and Wave XII (August 2008)



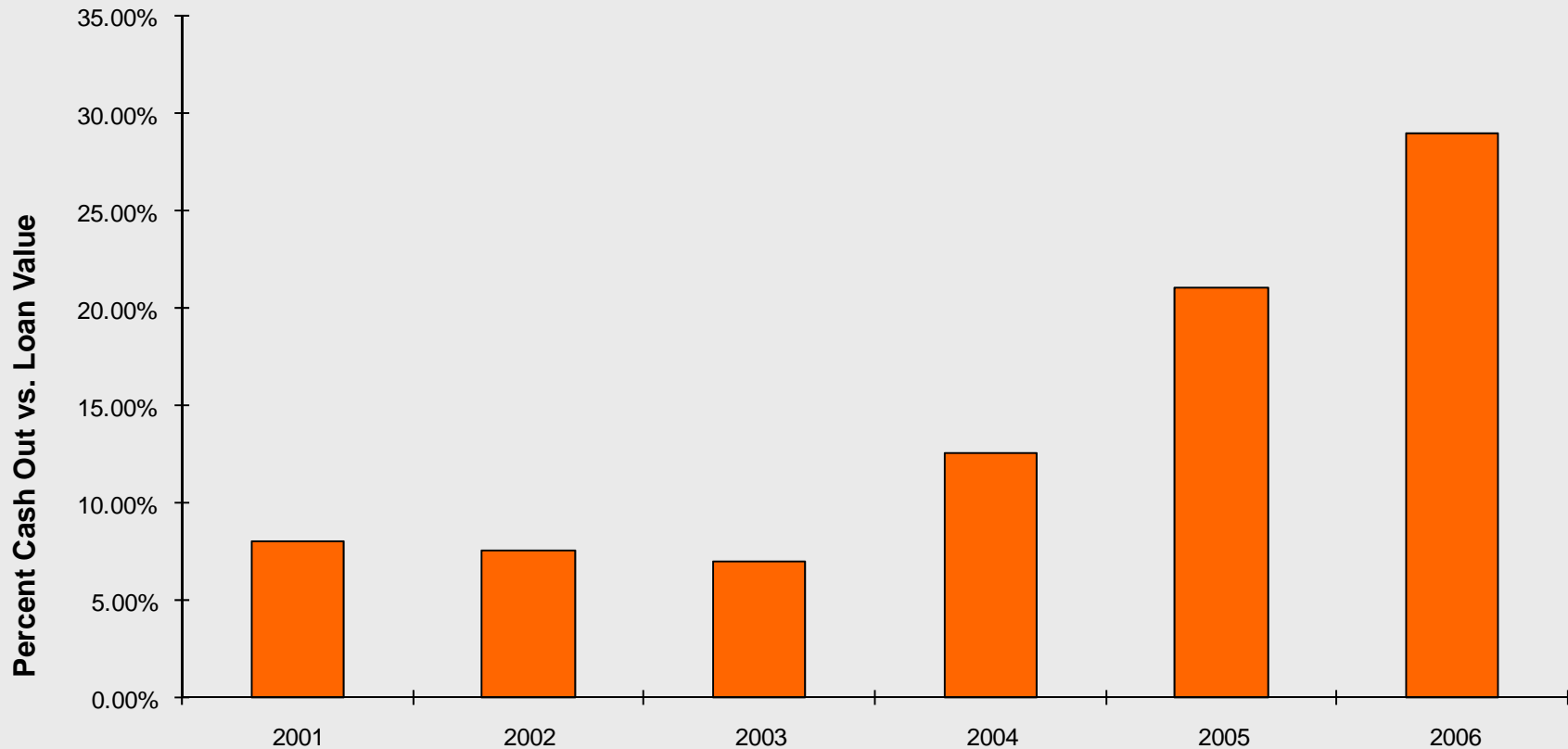
Business Owner: Usage of Online Media Reaches Parity with Traditional Media



Source: Local Commerce Monitor Wave XII August 2008. (Sample: 299).
Methodology: Online. Co-sponsor: ConStat.



Cash Out-REFI: Excess Money Caused Vertical Anomalies



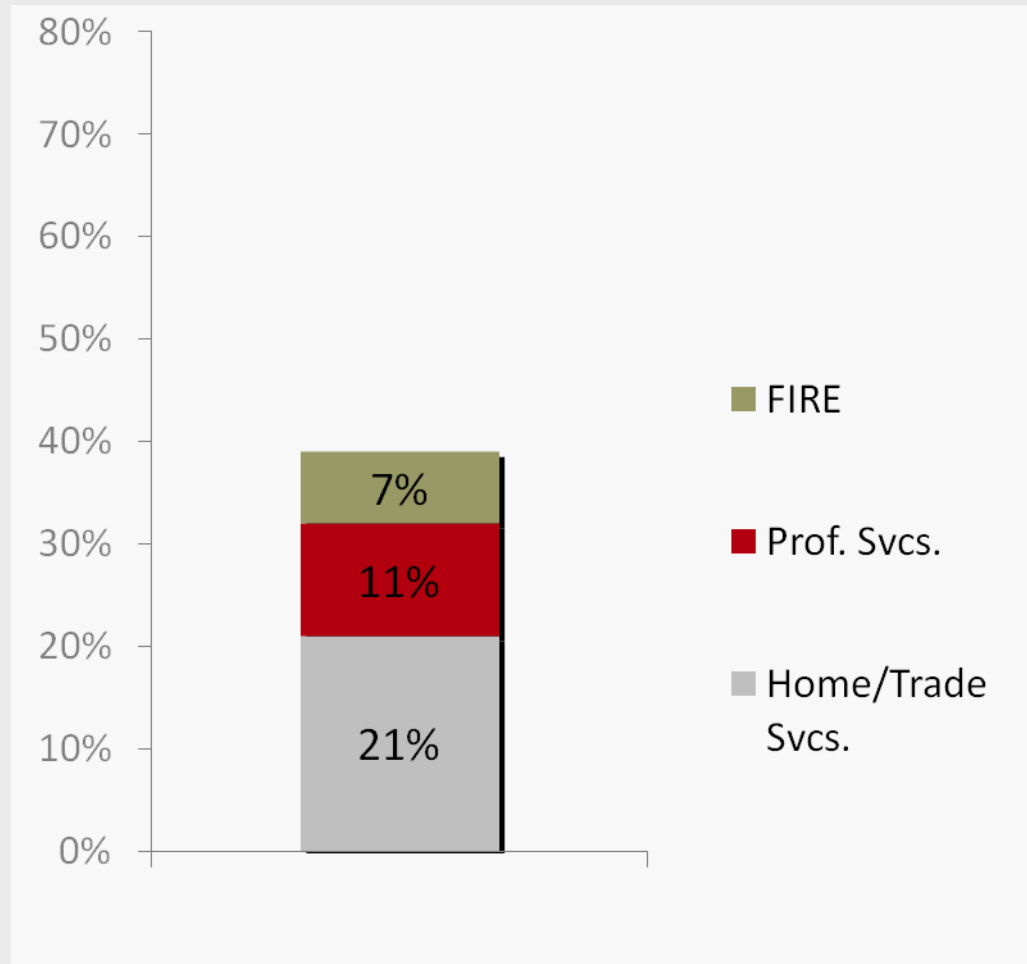
Source: Fannie Mae

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Ad Spending Will Tighten Due to REFI Market: Super Verticals' Share of PYP Revenues

Our 3 Super Verticals together account for about 40% of all print YP revenues

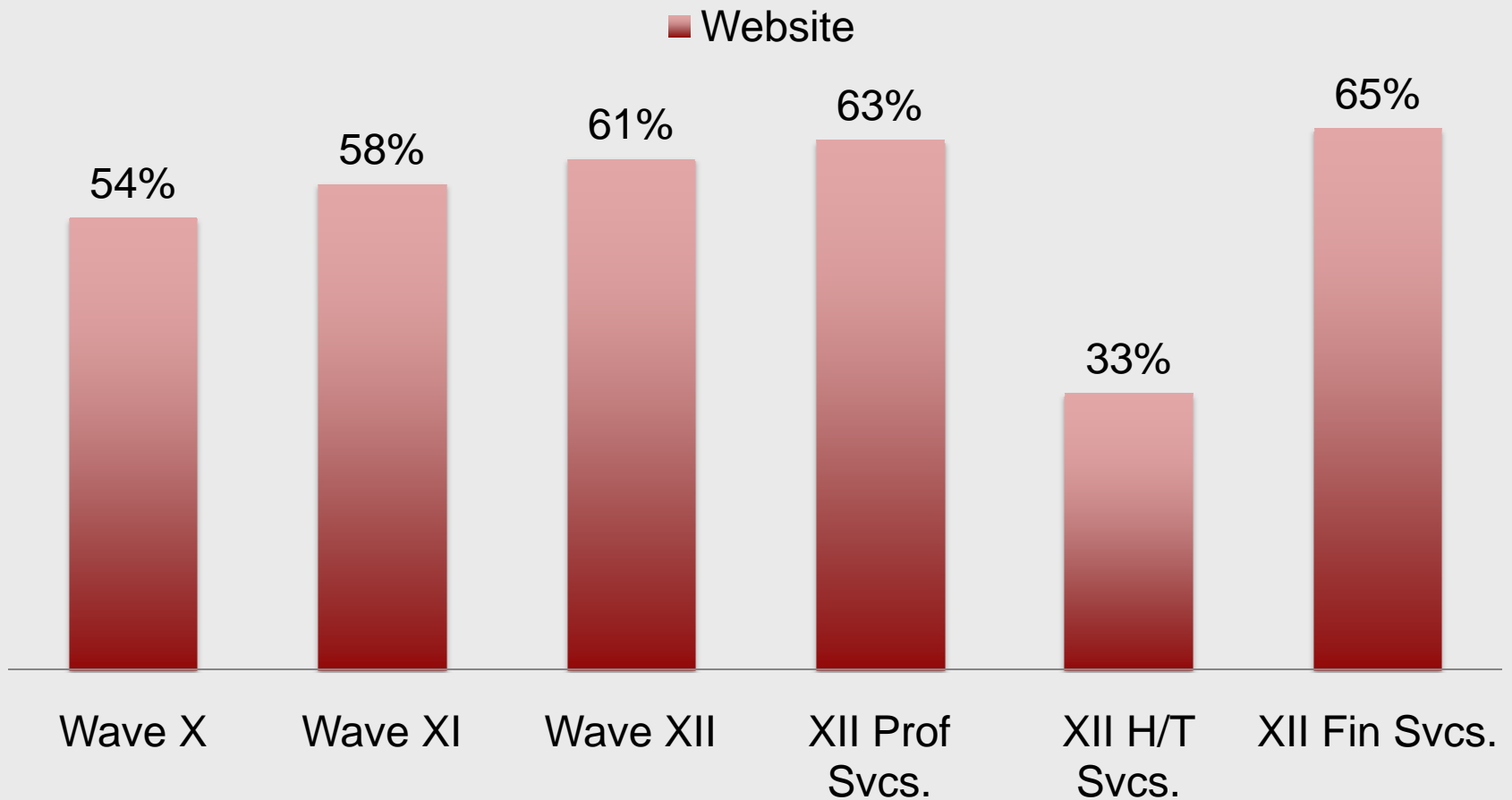


Source: Local Commerce Monitor Wave XII August 2008. (Sample: 299).
Methodology: Online. Co-sponsor: ConStat.

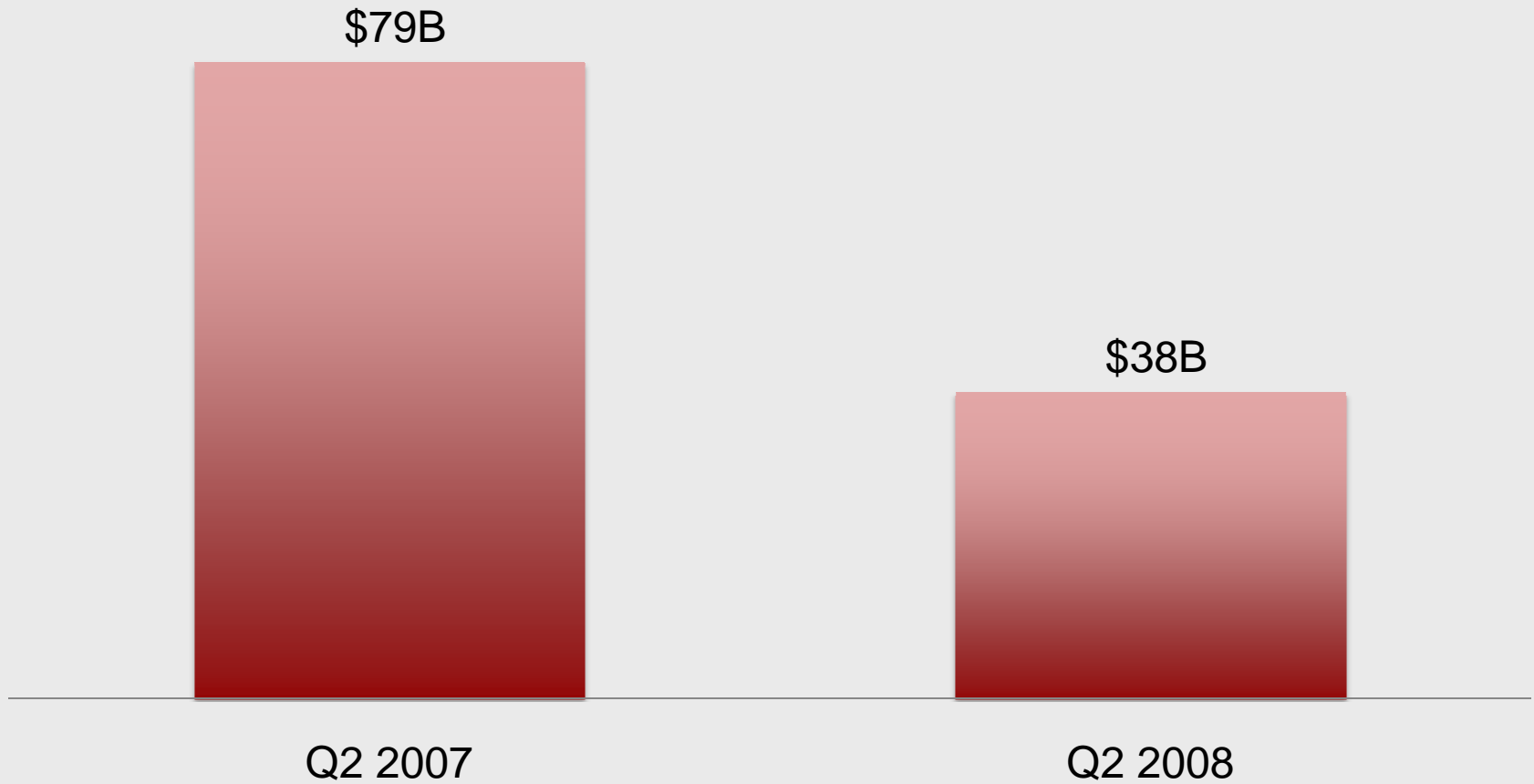


SMBs That Have Websites: By Vertical and LCM Wave

(Home & Trade Services lag all new media indicators)



Cash-Out REFI Q2 2008: Lowest Levels Since 2004



Source: Fannie Mae



New Media to Accelerate: Gaps to Close in 12-24 Months

- All new media spend indicators lag averages for Home and Trade Services
- Primary driver, excess cash

	Home & Trade Services Average (%)	Small Business Average (%)
Websites	33	61
Interactive Spend (less search)	14	19
Search Spend	1	3
Email Marketing	3	13
Traditional Media Spend	83	68



Small Business Visionaries: Angie's List and ServiceMagic

- **Angie Hicks**, CMO and Co-founder, Angie's List
- **Rodney Rice**, Co-chairman and Co-founder, ServiceMagic
- Angie's List: 650,000 subscribers in 124 markets; \$35 million in new investment.
- ServiceMagic: 50,000 pre-screened businesses in 500 categories.



Leveraging Traditional Media's Strengths Online

- **Kevin Cuddihy**, Sr. VP, Comcast Spotlight
- **Larry Olevitch**, Sr. VP of NBC Local Media sales
- **Meredith Papp**, Product Marketing Manager, Google

The Internet is still just 18.4 percent of all spending.....



Which Properties Bring the most Local Synergy?

- Comcast: Cable franchises; Broadband and telco service; Vehix; Fandango; Movies.com; Daily Candy; Plaxo
- NBC-U: 23 TV stations, TV network;; The Weather Channel; iVillage; various mobile WAP sites



Google: The Great Reviver of Traditional Media?

Google's traditional media program includes 750 newspapers, Clear Channel Radio and NBC. Google works with them to place:

- Audio Ads;
- Google TV
- Newspaper pilot program
- Remnant Ad Placements



5 Areas to Sizeup Google as a Partner with Media Companies

1. Technology
2. Search
3. Lower cost of site
4. Brand
5. ROI

But is Google getting Drive Time, or Remnant?



Yahoo and Newspapers: Leveraging Each Other's Strengths

- Lem Lloyd, VP, Newspaper Consortium, Yahoo
- Mike Silver, Executive Director, The Newspaper Consortium

Display advertising; Behavioral targeting; news and content placement; HotJobs



With Yahoo and Newspapers, Who Rescues Whom?

41 percent of Sunday circ.; 700- 900 reps selling Yahoo inventory...some newspapers selling \$1 million+ in annual inventory.

By zeroing in on customer prospects, newspapers may fetch super-premium rates for auto advertising and other major ad categories.



Localizing The Ad Nets: Display Channels

- Russ Fradin, CEO, Adify
- Shawn Riegsecker, CEO, Centro
- Jason Tafler, CEO, Pointroll

“What happens when Home Depot comes to us and wants to buy 20 percent, 50 percent, 100 percent of inventory across 60 markets? Agencies want a holistic solution.”

Shawn Riegsecker



SuperForum 1: Local/Small Business

SMB Keynote: Jeff Stibel, CEO, Web.com

300,000 paid subscribers for service bundles with SEO, SEM, lead generation and Web site hosting.

“An SMB’s bottom line is generating new business...”

Web.com



SMB SuperForum: Web 2.0 Community and Viral Effects

- Mike Englehart, CEO, LiveDeal;
- Matt Howard, CEO, SMBLive ;
- Darren Waddell, VP, MerchantCircle

“We’re analyzing hundreds of verticals to target. We’ve gotten good traction on limo drivers, private investigators, fertility clinics, weight reduction centers and specialized lawyers. It is a huge marketplace.”

Mike Englehart



SMB SuperForum: Leveraging Print and Online

- Paul Ryan, CEO, DoneRight;
- Josh Walker, CEO, CityVoter

“Build your own street team and OWN this [hyper-local] content. There is just as much interest in markets like Albany as markets like L.A.”

Josh Walker



SMB SuperForum: Sales Realities

- Todd Crandell, Metrix4Media.
- Court Cunningham, President, Yodle;
- Travis Fore, Network Solutions, Inc.;
- John Keister, COO, Marchex

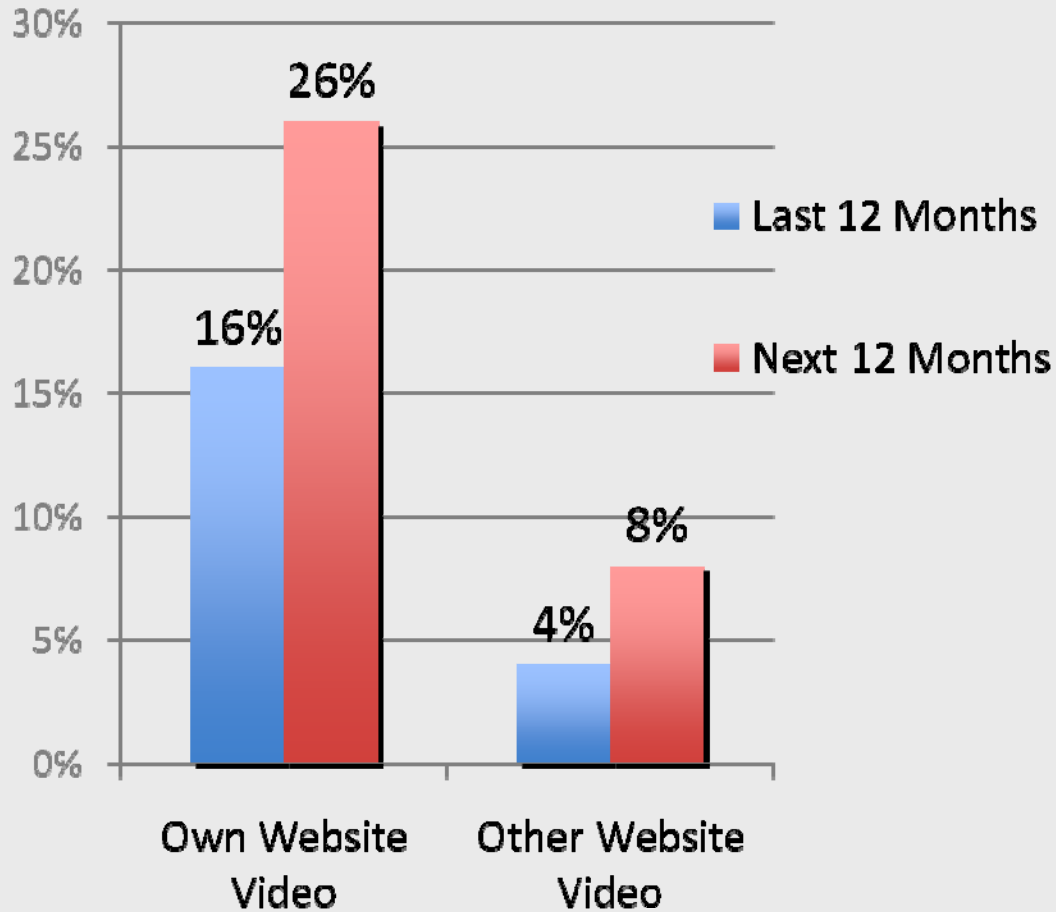
“We have 150,000 locally focused Web sites...consumers engage the long tail. It is a very long tail.”



Superforum 2: Local Video Explosion



SMB Video Adoption

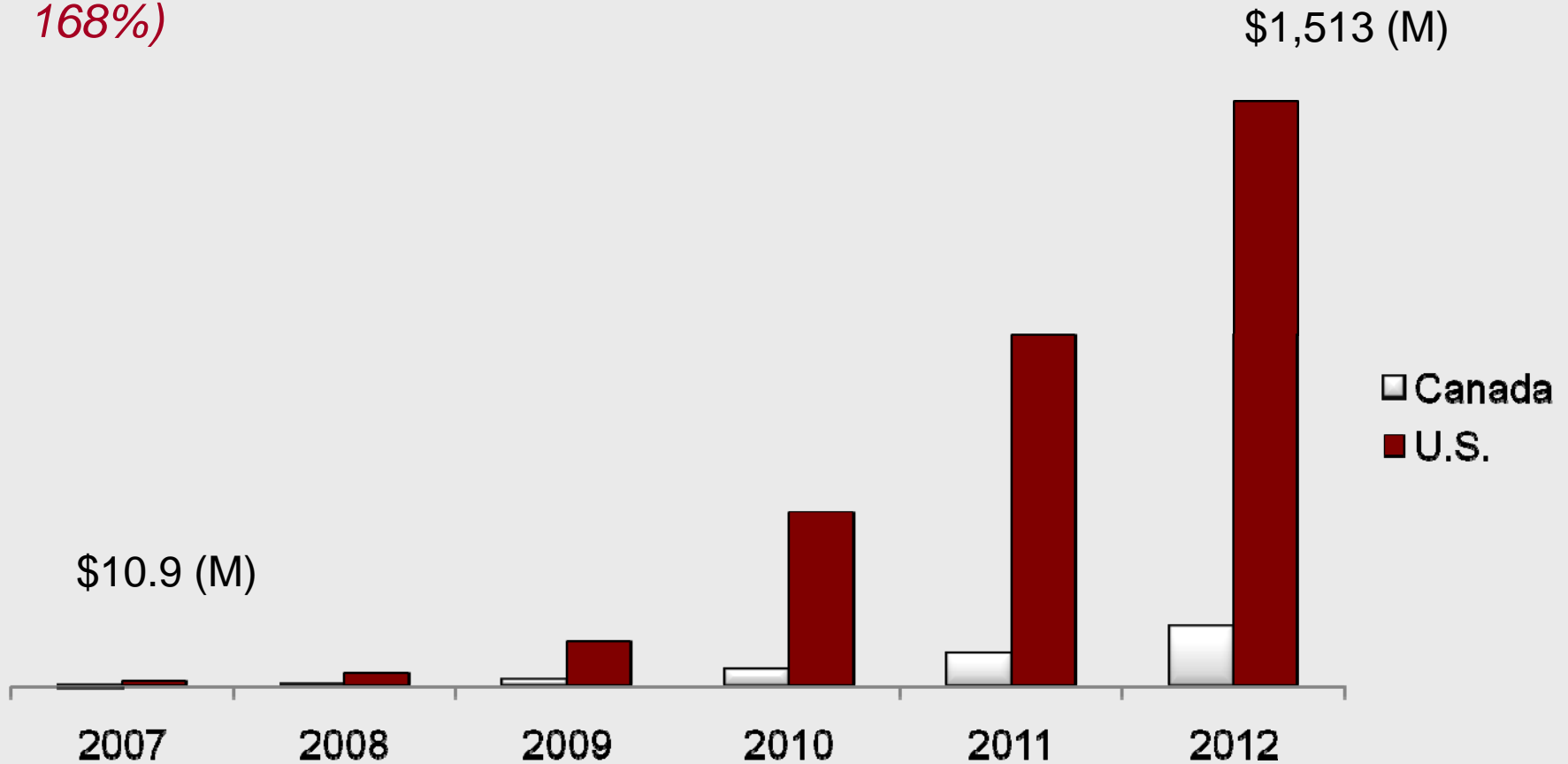


Source: The Kelsey Group Local Commerce Monitor



Superforum 2: Local Video Explosion

Local Video Sales Growth 2007-2012 (CAGR - 168%)



Superforum 2: Local Video Explosion

- Video Keynote: Brad Inman, CEO TurnHere
- 10 speakers on the key issues in local video advertising
 - Jon Rosen, VP local marketing services, Spot Runner
 - Gordon Henry, President North America, Spotzer
 - Frank Luceno, president AdFare
 - Steve Espinosa, Director of Product Development, eLocal Listing
 - Brian McCarthy, VP, Merchant Product, Citysearch
 - Diaz Nesamoney, Founder and CEO, Jivox
 - Glenn Pingul, VP, Product, Mixpo
 - Peter Bowen, CEO SeeSaw Networks
 - John McMenemin, CEO, RippleTV
 - Aileen Lee, CEO, Danoo



Pre-Conference: Local SEO Training

- “Mr. Local SEO”, Andrew Shotland on tips, tricks, and tactics for local search marketing





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