DATA PASSPORT

FIRST HALF 2009

comScore®

About This Data Passport

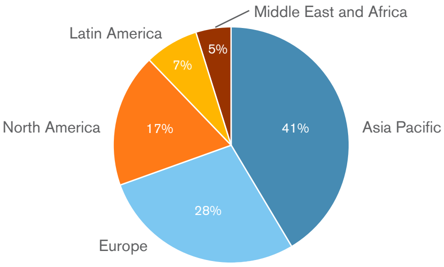
From emerging markets to converging media, comScore is the one global source of digital market intelligence that truly measures the digital world. This data passport offers a brief glimpse into the vast array of vital insights that only comScore can reveal.

comScore Measuring the digital world.™

01. GLOBAL INTERNET POPULATIONS

The Worldwide Internet Audience Has Grown And Shifted Dramatically In The Past Decade

Distribution of Worldwide Internet Audience. Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer, December 2008



Majority of global Internet users are in Asia. Fastest current growth is in Latin America & Middle East/Africa.

In 1996, two-thirds of the world's Internet population was in the United States. Today, Asia Pacific is the largest region, with China and India demonstrating particularly high growth. Latin America, the Middle East and Africa have experienced the fastest growth but have relatively low penetration. Central Europe and Russia are also high-growth areas.

Many emerging regions are likely to bypass old modes, skipping dial-up to go straight to broadband, making multimedia, video, and collaborative content immediately accessible. Early adoption of mobile web in addition to PC web will likely be popular in many of these high-growth areas.

Source: comScore Media Metrix

02. HOW THE WORLD USES THE WEB

Games, Conversational Media, and Entertainment Are The Fastest-Growing Online Categories

Global Reach and Growth of Key Online Categories, Internet Users Ages 15+ Accessing the Internet from a Home or Work Computer, January 2009

	Reach		
Selected Categories	Jan-08	Jan-09	Growth
Games	47.3	52.5	10.9
Conversational Media	69.6	74.5	7.1
Entertainment	76.8	82.0	6.7
Community	51.1	53.8	5.4
Reference	46.5	48.8	5.0
Services	90.5	94.6	4.5
Search/Navigation	83.8	87.6	4.5
Portals	89.1	92.4	3.7
News/Information	62.2	63.0	1.4
Technology	55.2	53.9	-2.4
Sports	32.1	31.3	-2.5
Retail	69.9	64.9	-7.2
Automotive	26.2	23.9	-8.6
Banking	32.7	27.9	-14.7
Travel	36.3	30.7	-15.5

Portals, Search and Services continue to be "on-ramps" to the Web. Global impact of economic downturn reflected in browsing habits.

The Conversational Media category, which includes social networks and blogs, continues to be a high-reach, high-growth category, attracting 3 out of 4 web users and growing at a rate of 7.1%. Increased adoption of broadband and the availability of content contribute to high growth in the Games and Entertainment categories as well. Portals, Search and Services—including email and IM—continue to be the most common entry point to the Web, while mainstream content sites maintain mid-reach and flat growth.
The challenging economic climate is reflected in a steep decline in visitation to Retail, Automotive, Banking and Travel sites.

Source: comScore Media Metrix

03. SOCIAL NETWORKING

Most Popular Social Networks Vary by Region; Mobile Social Networking on Uptick

Leading Social Networks in Various Regions, January 2009

Facebook has overtaken MySpace to become the global leader in social networking but the category is still very regional.

Facebook's global traffic has increased by 127% over the past year. Even with its growing popularity, there are still major differences in preferred social networks throughout the globe. Language considerations help drive clustered usage, particularly in countries such as China, Japan, Korea, Brazil and Russia, where user preference for the local language is strongest.

Mobile usage of social networking sites is growing rapidly.

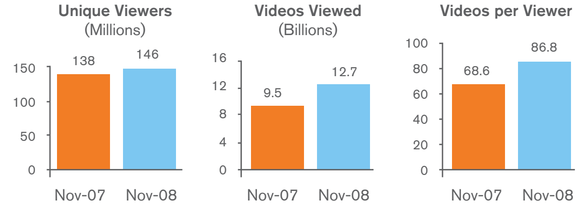
Almost 12% of the U.S. mobile population, or 27.1 million people, accessed social networking sites in January 2009. This is almost a twofold increase (197%) over the previous year. Among this group, frequent users are the fastest-growing audience, quadrupling (427%) versus a year ago.

Source: comScore Media Metrix, comScore MobiLens

04. MULTIMEDIA & VIDEO

Online Video Continues To Grow, With YouTube Maintaining Its Lead In The Category

Total U.S. Online Video Market, November 2008



Online video viewing continued its rapid ascent in 2008, with 6% more people in the U.S. viewing 34% more videos versus a year ago.

In November 2008, 146 million Americans viewed 12.7 billion online videos. Online video viewing now accounts for 12.5% of Americans' total time spent on the Internet, up from 8.5% in November 2007.

YouTube, with 40% market share in November 2008, continues to be a significant driver in the U.S. online video market, accounting for approximately two-thirds of the growth in online video views during the past year. The site generated 5.1 billion U.S. video views during the month, representing a 74% increase versus year ago.

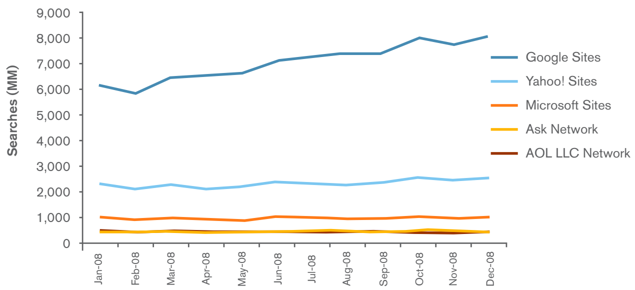
Hulu, the joint video venture of NBC Universal and News Corp, stormed onto the scene in 2008, and has grown its audience by 139% in the last six months. The site's success reflects a developing trend in online video—a move from short-form, user-generated content to long-form, professionally-created content, including full-length movies and TV shows.

Source: comScore Video Metrix

05. SEARCH

Americans Continued to Search More Often in 2008

Core U.S. Search Trend



Nearly 137 billion searches were conducted at the five core U.S. search engines in 2008, representing an increase of 21% versus the previous year.

Search query growth was driven largely by an increase in searches per searcher, which rose 16% from the previous year, while the number of unique searchers grew 6%. Google sites, which generated 85 billion searches in 2008, accounted for nearly 90% of the total growth in search query volume during the year. Google also remains the worldwide leader in search, accounting for 62% of global search activity.

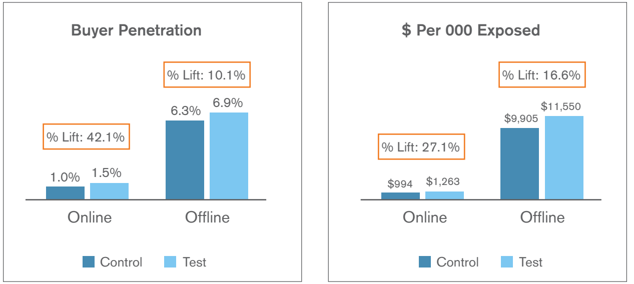
Google is clearly the primary search provider in South America and Europe but commands far less share in Asia and Russia, where local providers—such as Naver (South Korea), Baidu (China) and Yandex (Russia)—dominate their markets.

Source: comScore qSearch

06. ADVERTISING EFFECTIVENESS

Click Rates Have Dropped Dramatically In Recent Years, But Ad Exposure Still Impacts Consumer Behavior

Effects of Display Advertising Exposure on Online and Offline Consumer Purchasing



Display ad exposure generates significant lifts in site visitation, brand search activity, as well as online and in-store purchasing, despite click rates that have fallen to 0.1%.

Data from comScore's advertising effectiveness norms database shows that display advertising—despite a lack of clicks—can have a significant, positive impact on consumer behavior, including: visitation to an advertiser's website (lift of at least 46% over a four week period), usage of brand name search (lift of at least 38% over a four week period), likelihood of buying the advertised brand online (an average 27% lift in online sales), and likelihood of buying at the advertiser's retail store (an average lift of 17% in in-store sales).

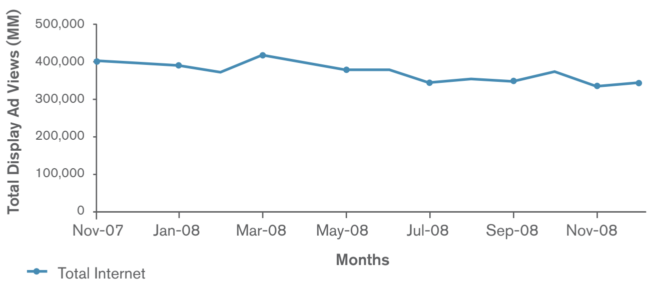
Other measurement methods that rely on cookies don't provide the answer. comScore research has found that 30% of users delete their cookies in a month, deleting an average of 4.7 times.

comScore Campaign Metrix, *Whither the Click?* White Paper

07. DISPLAY AD VIEWS

Signs of Softness in Display Advertising

Total U.S. Display Ad Views, November 2007 to November 2008



Despite high volume, display ad views declined by 12% over the course of the year.

U.S. Internet users viewed a total of 4.5 trillion display ads (including both static and rich media, but not video) during the past twelve months, with the average person viewing more than 2,000 ads per month. Despite the staggering total volume of display ad views, the number declined somewhat during 2008.

Source: comScore Ad Metrix

Phone Service Providers Are Top Advertisers

Top Ten U.S. Online Display Advertisers, November 2008

Top display advertisers continue to be dominated by phone service providers.

In November 2008, AT&T was the top online advertiser, with 6.6 billion ad views, while Sprint Nextel (3.3 billion), Vonage (2.6 billion) and Verizon (2.6 billion) also made the top-ten list.

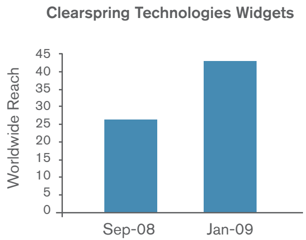
Source: comScore Ad Metrix

08. EXTENDED WEB & DISTRIBUTED CONTENT

Slide, Inc. Is The Global Leader In Publishing Distributed Content; Clearspring Technologies Is The Leader Among Platforms

Top Ten Global Distributed Content Publishers (Among Participating Publishers), January 2009; Growth in Reach of Clearspring Technologies, a Top Extended Web Platform (Among Participating Platforms)

Publisher	WW Reach
Slide, Inc.	13.8%
ShareThis	13.3%
MochiMedia	7.8%
Rock You	5.7%
pYzam	4.3%
Project Playlist	3.7%
AOL LLC Widget	3.0%
LabPixies	1.5%
NBC Universal Widget	1.4%
Grab Networks	1.2%



The market for distributed content—widgets, gadgets, and applications—has grown 34% since September 2008, and now comprises half of the global Internet audience.

Slide, Inc., a publisher of widgets and applications for social networking sites, had a worldwide reach of 13.8% in January 2009. ShareThis, the #2 widget publisher included in comScore's extended web reporting, was the fastest growing, with a 49% increase in unique visitors since September 2008.

Among extended web platforms, Clearspring Technologies is emerging as a clear leader, reaching 43% of all web users worldwide, a 63% increase in reach over the past five months.

Source: comScore Extended Web Report

09. CONSUMER SPENDING

Unemployment And Job Security Now Overshadowing Other Consumer Concerns

Percent of Respondents Citing Their One Most Important Economic Issue

Q: Based on your situation, which one of the following economic conditions most concerns you?

	Rising Prices				Unemployment/ Job Security				Financial Markets				Real Estate/ Home Values			
	Apr-08	Jul-08	Oct-08	Jan-09	Apr-08	Jul-08	Oct-08	Jan-09	Apr-08	Jul-08	Oct-08	Jan-09	Apr-08	Jul-08	Oct-08	Jan-09
Total	64%	67%	43%	29%	15%	14%	21%	46%	10%	8%	25%	14%	6%	5%	8%	7%
Household Income																
$100k or more	67%	56%	20%	15%	8%	9%	12%	42%	16%	14%	49%	20%	6%	14%	14%	19%
$50k-$99,999	62%	67%	35%	21%	11%	13%	22%	50%	12%	9%	29%	18%	10%	7%	11%	9%
Under $50k	65%	70%	53%	36%	18%	16%	22%	44%	6%	6%	17%	10%	4%	2%	5%	3%

Unemployment/Job security is a top economic concern among U.S. consumers, while worries about rising prices and the financial markets decline.

According to periodic consumer surveys conducted by comScore, the top economic issue for all income groups in January 2008 was unemployment, with 46% of all respondents saying that it is the economic condition of most concern to them.

2008 saw a dramatic increase in people conducting financial and economic-related searches on the Web.

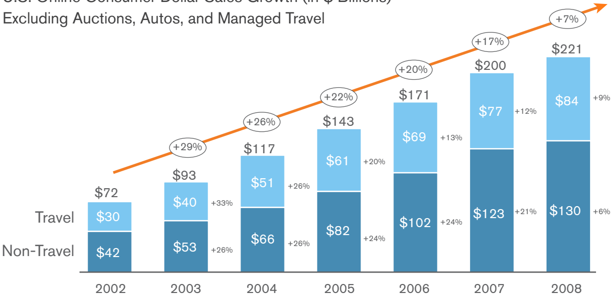
The number of people searching on terms related to unemployment and bankruptcy more than doubled throughout 2008.

Source: comScore Custom Research

10. E-COMMERCE

Online Spending Growth Slows—But Does Not Stop—Amid Economic Slowdown

U.S. Online Consumer Dollar Sales Growth (in $ Billions)
Excluding Auctions, Autos, and Managed Travel



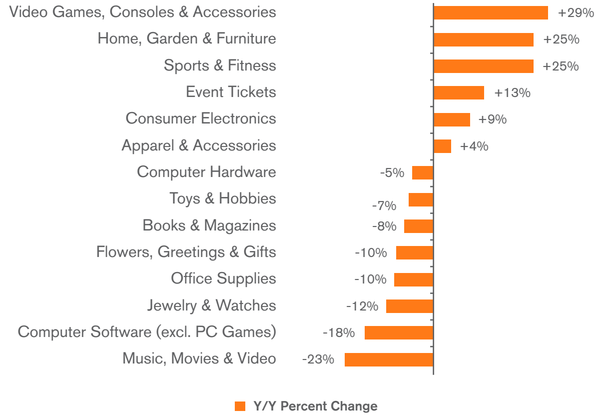
Total U.S. e-commerce spending reached $221 billion in 2008, a 7% increase versus the previous year.

Travel e-commerce spending grew 9% in 2008 versus year ago, to $84.3 billion, while retail e-commerce spending (non-travel) grew only 6% to $130.1 billion. Following several years of high growth rates hovering at 20% and higher, 2008 marked the softest year for retail e-commerce growth since comScore began tracking e-commerce sales in 2001.

Online spending growth rates peaked in April 2008 at 15% and then steadily declined through the remainder of the year. The important holiday shopping months of November and December both saw negative growth rates of -3%. In early 2009, however, online spending recovered slightly, with sales in January 2009 increasing 2% versus year ago.

Source: comScore e-Commerce Report

Fastest Growing U.S. Retail Categories in 2008



Video Games, Consoles & Accessories was the fastest-growing retail category in 2008, while the Software, Music, Movies & Video category declined as more consumers chose to stream and download instead of purchasing CDs and DVDs.

The fastest-growing retail category in 2008 was Video Games, Consoles & Accessories (up 29% versus 2007), which continued to benefit from online sales of popular game consoles like the Nintendo Wii, Microsoft Xbox 360 and Sony PlayStation 3.

Other fast-growing categories included Home, Garden & Furniture (up 25%) and Sport & Fitness (up 25%). Collectively these growth categories suggest a growing cocooning dynamic among U.S. consumers as they spend more time at home.

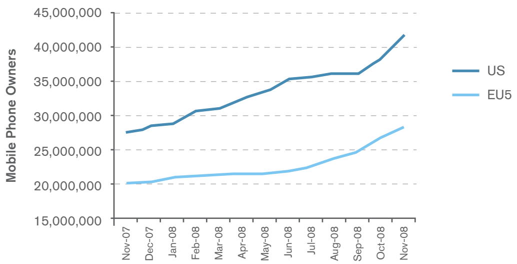
The Computer Software and Music, Movies & Video categories continue to see large declines in online purchasing, as more content becomes increasingly available via free and paid download.

Source: comScore e-Commerce Report

11. MOBILE INTERNET USAGE

Mobile Browsing Audience Growing Rapidly

Mobile Browsing Audience for News, Info, and Entertainment, Nov. 2007-Nov. 2008



New handsets, unlimited data plans and better user experiences drive audience growth in U.S. and Europe.

From November 2007 to November 2008, the number of people using their mobile phone to browse for news, information and entertainment increased by 52% in the U.S. and by 42% in the five largest European markets—United Kingdom, Germany, France, Spain, Italy.

The browser is not the only way people on-the-go stay connected. While the audience using downloadable applications to access news, information, and entertainment is less than half the size of the browsing audience, in both the U.S. and Europe this group has nearly doubled in size in the past year driven in large measure by the iPhone. As more application stores come online in 2009, this is a key sector to watch. The growth in mobile browsing and application use is driving another trend in mobile: advertising-supported business models.

Source: comScore MobiLens

GSMA Mobile Media Metrics Feasibility Study

Top Mobile Sites Versus Top Internet Sites, December 2008
U.K. Mobile Phone Users (Sample of U.K. Operators) and U.K. Internet Users

	Top 10 Mobile Sites	Top 10 PC Internet Sites
1	Mobile Operator Sites	Google Sites
2	Google Sites	Microsoft Sites
3	Facebook.com	Yahoo! Sites
4	Yahoo! Sites	Facebook.com
5	BBC Sites	EBay
6	Apple Inc. Sites	BBC Sites
7	Microsoft Sites	AOL (inc. Bebo)
8	Sony Online (inc. Sony Ericsson)	Amazon Sites
9	Nokia	Ask Network
10	AOL (inc. Bebo)	Wikimedia Foundation Sites

Operator sites continue to command the largest audiences, with 68% of mobile users in U.K. visiting operator portals.

Google is the #1 off-portal destination, while Facebook reigns as the leading mobile site in terms of time spent browsing. Mobile users accessing Facebook spend an average of 24 minutes per day on the site, similar to the 27.5 minutes spent by PC users.

These mobile user findings were gleaned from the GSMA Mobile Media Metrics program feasibility study—with comScore as its measurement partner. The program delivers real, anonymized and aggregated mobile audience data for rich planning information for the media and advertising industries. The U.K. operator task force comprises Telefónica, Vodafone, Orange, T-Mobile International and 3.

Source: GSMA Mobile Media Metrics U.K. Feasibility Study; comScore Media Metrix

ABOUT COMSCORE

Measuring the Digital World.™

comScore is a global leader in measuring the digital world and the preferred source of digital marketing intelligence.

Industry leaders turn to comScore for insight into the behaviors and attitudes of digital media consumers in order to design more powerful sales and marketing strategies.

comScore maintains massive proprietary databases that provide a continuous, real-time measurement of the myriad of ways in which consumers use the PC and mobile Internet. Experienced comScore analysts work closely with clients to identify their business objectives and determine how they can best apply, and benefit from, comScore's vast databases of Internet user behavior.

Whether your focus is online or multi-channel, direct response or long-term branding, domestic or global marketing, comScore provides the critical digital intelligence to succeed in today's competitive marketplace.

COMSCORE PRODUCT SUITES & SERVICES

Media Planning & Analysis

Identify and profile online consumers. Discover where to best reach a desired audience. Demonstrate a site's value by defining visitor characteristics. comScore Media Planning & Analysis solutions offer the world-class tools needed to identify, reach and target online audiences.

Advertising Effectiveness

Prove the effectiveness of every advertising dollar. Maximize ROI. Evaluate and manage online marketing efforts. comScore Advertising Effectiveness Solutions work independently, or in combination, to deliver the powerful insights needed to optimize advertising spend at every stage—from pre-buy planning to post-campaign analysis.

Search Marketing

Know the complete search landscape. Understand how various audiences search. Optimize search marketing efforts. comScore Search Marketing solutions provide details on consumers' search behaviors, a comprehensive view of the competitive landscape and insights into key search trends across more than 160 worldwide sites.

Continued from previous page.

Mobile

Explore the "who, what and how" of mobile users. Gain insights into the competitive landscape. Learn about the various behaviors and demographics of mobile web audiences. comScore Mobile solutions offer unprecedented visibility into the mobile ecosystem.

Cross Media Measurement

Measure advertising effectiveness across platforms—Internet, mobile, TV, radio and print. Optimize marketing spend. Plan campaigns more efficiently. comScore Cross Media Measurement capabilities quantify the effectiveness of each media channel on an advertising campaign, including branding impact as well as online and offline behaviors.

Video & Distributed Media Measurement

Uncover the size, growth and composition of distributed web audiences. Identify the most attractive types of distributed content—widgets, videos, social applications or other emerging platforms. Understand how usage patterns change over time. comScore Video & Distributed Media Measurement solutions provide accurate and comprehensive measurement of distributed web content.

Marketing on the Internet

Design fully integrated marketing strategies. Drive qualified traffic to a content website. Boost sales by identifying and reaching new audiences online. comScore Marketing on the Internet solutions provide the superior digital intelligence and consumer insights needed to successfully achieve online objectives.

Technology Tracking

Analyze hardware and software configurations for thousands of devices. Understand how consumers' technology-usage behaviors shift. Capitalize on trends in personal computer and mobile device technology. comScore Technology Tracking services combine device-level data with user demographics and online behavioral insights to deliver the most complete profile of technology usage.

Custom Research

Get tailored, accurate and actionable insights. Design studies geared toward actual business objectives. Measure the success of specific marketing efforts to improve future campaigns. comScore Custom Research studies leverage the massive comScore panel, sophisticated methodologies and expert analysts to deliver industry-leading marketing insights.

Contact Information

To learn more about how comScore can help you compete and succeed in the digital world, please contact us today:

Online
www.comscore.com

Email
info@comscore.com

United States
+1 866 276 6972

Canada
+1 416 646 9911

Europe
+44 207 099 1760

Japan
+81 3 5789 5555

comScore cares about the environment. This passport is printed on Forest Stewardship Council (FSC) certified paper stock by a printer dedicated to green practices.

comScore