

New Advertising Platforms and Technologies

By Harry Wang, Senior Analyst

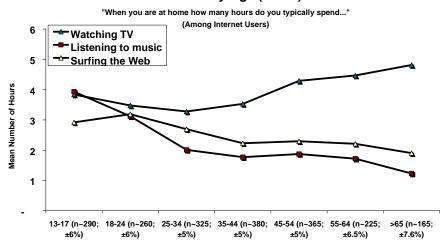
1Q 2008

Synopsis

This report profiles new digital media platforms including online video, IPTV, VOD/DVR, Podcast, and mobile phone and evaluates their viability as ad platforms for advertisers, content owners/publishers, and consumers. It also analyzes new adserving technologies and highlights innovative approaches of tracking and measuring audience engagement levels for new ad revenue models.

Time Spent on Various Activities

Activities by Age (Q3/06)



Source: Digital Media Habits © 2006 Parks Associates

Publish Date: Feb 08

"New media create both opportunities and challenges for advertisers," said Harry Wang, senior analyst with Parks Associates. "Growing these new entertainment platforms requires not only delivering compelling content but also sending the right message to the right person at the right moment and reporting back to advertisers with convincing and reliable engagement metrics."

Contents

The Bottom Line is a

level summary of the

market, evolutionary

business in this space.

A Parks Associates'
Resource Book

contains a wealth of

consumer survey data

and company profiles—

concise, executive-

current state of the

path, and the implications for

companies doing

The Bottom Line

1.0 Notes on Methodology

- 1.1 Data Sources
- 1.2 Definitions

2.0 A Glance at the New Media

- 2.1 A Disruptive Ad Age
- 2.2 Consumer Media Consumption Habits and Trends

3.0 Online Video and Social Networking Advertising Opportunities

- 3.1 Growth of Online Video Market
- 3.2 User-Generated Content and Advertising
- 3.3 Ad Format, Inventory and Pricing Trends
- 3.4 Ad Serving Technology and Business Models
- 3.5 Behavior-Based Targeting and Audience Engagement Measurement
- 3.6 Forecast of Ad Spending on Online Streaming Video

4.0 Advertising for Downloadable Media: Podcast and Others

- 4.1 Advertising on Downloadable Media
- 4.2 Market Forecast of Ad Spending on Downloadable Media

5.0 New Advertising Opportunities for TV Service Providers

- 5.1 Growth of New TV Services: IPTV, DVR, & VoD
- 5.2 Non-Linear TV Advertising Opportunity

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a must-have reference for product/market planning.

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- 5.3 Ad Serving Technologies for New TV Platforms
- 5.4 Challenges of Delivering Non-Linear Ads on TV
- 5.5 Forecast of Ad Spending on Non-Linear TV Services

6.0 The Next Frontier: Mobile Advertising

- 6.1 Growth of Multimedia Mobile Content and Internet Access
- 6.2 Choice of Ad Formats and Business Models
- 6.3 Drivers and Barriers of Mobile Advertising
- 6.4 Market Forecast of Ad Spending on the Mobile Platform

7.0 Conclusions and Recommendations

- 7.1 For Advertisers and Their Agencies
- 7.2 For Content Owners and Publishers
- 7.3 For Technology Vendors

Resource Book

Section I: Consumer Usage of Electronic Devices and Media Consumption Habits

Section II: Consumers' Attitudes toward Advertising

Section III: Company Profiles—Vendors for Online Video Ad Technologies

blinkx Castfire ScanScout

Section IV: Company Profiles—Vendors for Ad Delivery on Provider Platforms

BigBand Networks

BlackArrow

C-Cor

ExtendMedia Inc.

ICTV

Packet Vision Limited

SeaChange

Tandberg TV

Section V: Company Profiles—Vendors for Ad Delivery on Downloadable Media

Kiptronic, Inc.

VoloMedia (Formerly Podbridge, Inc.)

Section VI: Company Profiles—Mobile Advertising Technology Providers

4Info

AdMob

CellFire

Enpocket

go2

GreyStripe

Third Screen Media

Section VII: Section VII: Company Profiles—Other Ad Technology Providers

AdReady

Google Inc.



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MSN Search Rentrak Corporation Yahoo! Inc.

Figures

The Bottom Line

Household Entertainment Device Penetration among Online Population Advertising Industry Stakeholders' Responses to New Media Challenges Ad Industry Consolidation & Strategic Implications

Hours Spent on Digital Activities

U.S. Consumers' Video Consumption Frequency

U.S. Consumers' Online Video Use by Genre

Pay-TV Service Features

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Internet Video Moves by TV Broadcasters and Broadband Service Providers Ad Exchange Models

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Watching Full-length Online Video (Frequency by Age)

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Social Media Users' Video Consumption Habits

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Ad Formats for Online Video Content

Examples of Online Video Advertising Rates

Video Ad-Serving Technology from Large Ad Network

Selected Online Video Advertising Technology Vendors and Business Models

Behavioral Targeting Firms: Strengths and Business Relationships

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Total Video Clips Streamed per Month: U.S. Broadband Households

Total Revenue Forecast: Ad-supported Online Video (Chart)

Total Ad-Supported Internet Video Revenue Forecasts (Table)

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Technology Vendors for Downloadable Media Advertising

Downloadable Media Ad Spending Forecast (Figure)

Downloadable Media Ad Spending Forecast (Table)

Premium VoD Usage Growth

Service Providers' VoD Strategies

Emerging Ad Formats on Digital On-Demand TV Platforms

Summary of Service Providers' Strategies for Non-Linear TV Advertising

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Summary of the Challenges of Delivering Ads to Non-Linear TV Platforms SCTE's DVS 629 Standards

U.S. VoD Ad Revenue for IPTV Providers (2007-2012)

U.S. VoD Ad Revenue Forecast for Cable Companies (2007-2012)

U.S. DVR Ad Revenue Forecast (2007-2012)

U.S. Ad Revenue Forecast for Non-Linear TV Services (2007-2012)

Mobile Phone as a Communication Device

Mobile Operators' Multimedia Services, Broadband Roadmap, and 3G Handsets

Mobile Ad Formats and Their Usage

Mobile Advertising Solution Companies

Attitudes toward Mobile Advertisements

Interest in Ad-Supported Mobile Services



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Total Annual Mobile Ad Revenue (2007-2012) U.S. Mobile Advertising Forecast 2007-2012 (Table) Mobile Ad Revenue Forecast by Type of Advertisement (Figure)

Resource Book

Household Entertainment Device Penetration among Online Population

Household Computer Usage

Mobile Phone as an Entertainment Platform

Mobile Phone as a Communication Device

Pay Television Services

Hours Spent on Digital Activities

Computer Activities

Other Computer Activities

Video Service Features

VOD Service Growth

Frequency of Video Consumption Activities Q1/07

Frequency of Video Consumption Activities Q3/07

Downloading Full-length Programs (Frequency by Age)

Downloading Short Videos (Frequency by Age)

Watching Video on a Portable MP3 Player (Frequency by Age)

Watching TV/Video on a Cell Phone (Frequency by Age)

Watching Short Online Video Clips (Frequency by Age)

Watching Full-length Online Video (Frequency by Age)

Recording TV Programs on DVR (Frequency by Age)

Interest in Ad-Supported Mobile Services

Attitudes toward Mobile Advertisements

Interest in Mobile Advertisements by Age

Interest in Mobile Advertisements by Gender

Attributes

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Executive Editor: Tricia Parks Published by Parks Associates

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Dallas, Texas 75230

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