The Marketing Data Box
A QUARTERLY COLLECTION OF PRACTICAL MARKETING TOOLS READY FOR PROFESSIONAL USE

trends • insights • analysis • charts • ready to use • easy to share

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HubSpot
“The Marketing Data Box” is part of Watershed Publishing’s Data Insights series featuring news, data and research. The quarterly collection supplies the busy marketing professional with a time-saving collection of research and facts, in the form of charts and Excel documents, in order to make the knowledge demands of daily marketing an easier task. Our data comes from major data partners and captures essential marketing data over the short term for a fast, easy glance at trends.

The charts in this collection are ready to use, download, format, and otherwise support your marketing goals. Feel free to share the whole presentation or any slide, with your colleagues and business partners, but please preserve credits to our sponsor, HubSpot, our research partners who provide the source data, and our links to MarketingCharts.com.
By many accounts, the economy is on an upswing: Major advertisers increased spending by about 6%, but perhaps more importantly, roughly 40% of Americans indicated that the economy is “getting better.”

This is important news for marketers of all stripes, since it impacts the way they will approach their marketing efforts.

But that’s just one of many practical marketing facts that have been collected in “The Marketing Data Box.”

In this issue here are just a few facts you’ll discover:

- The benefits and consequences of social media to US Adults
- Whether Americans are willing or not to pay for online news
- The average cost per lead for outbound vs. inbound marketing
- The percentage of mobile users that own smartphones
- What activity dominates mobile internet time (and it’s not social networking)
- Ecommerce growth rates
- What percent of US population search online for health information, and where they are most likely to go
- The TV programming that will make your ads more likely to be thought of as trustworthy

There are 65 charts on 54 data slides in this issue – as well as insightful analysis you can share with your blog or newsletter subscribers, and fellow marketing and sales team members. As a marketer, how can you resist?

Enjoy,

The HubSpot Team
http://www.hubspot.com
Charts inside...

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Media & Advertising

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News Audience
Revenue by News Source
Top 10 Print Media Websites
2011: $173 Billion in Revenues

Top 10 Advertisers Spend Trend
2009 v. 2010, US$ Millions
Source: Kantar Media

Large advertisers back to spending in 2010

Spending among the 10 largest advertisers increased 5.9% to $11.91 billion in the first nine months of 2010. However, total advertising levels remain below those observed in the recent peak (pre-recession) year of 2006, with researchers projecting the industry’s size likely to equate to $173 billion in revenues this year.
Strong growth in television media

How did the spending flow? According to Kantar Media reports, of the major media channels, the TV sector reported the best year-over-year ad expenditure growth rate in 2010 (10.3%). Within the sector, extremely strong spot TV growth (24.2%) and impressive growth in Spanish language cushioned enough for the 2.8% contraction in large-scale national syndicated campaigns.
Ad Spend for Radio Up 7%

Strong showing for radio

Radio has been hanging tough in these years, holding audience, and attracting advertising. Radio media spending increased 7.6% led by national spot radio, with an 18.6% increase. Radio has fared well overall in terms of listenership, too. Network radio maintained its reach to about 189.7 million listeners, or nearly 74% of Americans age 12 and up, according to Arbitron RADAR 107.
Newspapers: Negative and Slow

Ad Spend for Newspaper Media
2009 v. 2010, % change
Source: Kantar Media

Newspaper media total -3.5%
Local newspapers -4.6%
National newspapers 2.7%
Spanish-language newspapers 2.0%

Newspapers lose audience, revenue

There is not much good news for print advertising revenue stream. MagnaGlobal analysis indicates reported totals are held back by deep structural weakness in printed media, which weakens with every passing quarter.

MagnaGlobal predicts newspapers, magazines, directories and direct mail will likely decline by 2.9% during 2011.
Sunday Mags are Bright Spot

Ad Spend for Magazine Media
2009 v. 2010, % change
Source: Kantar Media

Sunday magazines show some growth

Data from The Nielsen Company, also found that in terms of ad spending, print media overall (national and local magazines, newspapers, Sunday supplements and B2B) was flat, not picking up on the energy of other media. However, national Sunday supplements received a significant uptick with 20.5% growth from last year. (Local Sunday supplements fell about 13%.) National magazines were also up 7.4%.
News audience moves online

An increasing share of the US news audience turned to the internet in 2010, according to a new report from the Pew Project for Excellence in Journalism. Data from “State of the News Media 2011” indicates in 2010, every news platform except for the internet saw audiences either stall or decline.

Internet News Platform Grows 17%

Pew data indicates the US audience for the internet news platform grew 17.1% between 2009 and 2010. Every other major news platform declined during that year. For example, the local TV audience declined the least among the other platforms at 1.5%, while the cable TV audience declined the most at 13.7%.
More people choose online news

For the first time, according to Pew research, more people said they got news from the web than newspapers. The internet now trails only television among American adults as a destination for news, and the trend line shows the gap closing.
More online ad revenue than print

Financially, the tipping point also has come. When the final tally is in, online ad revenue in 2010 is projected to surpass print newspaper ad revenue for the first time.
23% Would Pay for Online News

Top 10 Print Media Websites
by U.S. Market Share of Visits (%), March 2011
Source: Experian Hitwise

- The New York Times: 4.3%
- USA Today: 2.4%
- People Magazine: 2.3%
- The Washington Post: 1.6%
- TV Guide.com: 1.4%
- Daily Mail: 1.4%
- Sports Illustrated: 1.3%
- NY Daily News: 1.2%
- The Wall Street Journal: 1.2%
- Examiner: 0.9%

Online newspapers examine paid content

Frankly, we don’t hear the shouts of “told you so.” Newspapers are implementing paid content models, and consumers, influenced by mobile devices, are more prepared for the leap. 23% of Americans said they would pay $5 a month for an online version if their local newspaper would otherwise perish. 47% of Americans used a mobile device to obtain news content, but 10% of those who have downloaded local news apps have paid for them to date.
Top News Brands Lead Web, Too

Top 10 Print Media Websites
Source: Experian Hitwise

<table>
<thead>
<tr>
<th>Website</th>
<th>January 2011</th>
<th>February 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>The New York Times</td>
<td>3.9</td>
<td>3.9</td>
</tr>
<tr>
<td>People Magazine</td>
<td>2.8</td>
<td>2.7</td>
</tr>
<tr>
<td>USA Today</td>
<td>2.4</td>
<td>2.3</td>
</tr>
<tr>
<td>The Washington Post</td>
<td>1.7</td>
<td>1.6</td>
</tr>
<tr>
<td>NY Daily News</td>
<td>1.5</td>
<td>1.4</td>
</tr>
<tr>
<td>TV Guide.com</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>Sports Illustrated</td>
<td>1.4</td>
<td>1.4</td>
</tr>
<tr>
<td>The Wall Street Journal</td>
<td>1.3</td>
<td>1.2</td>
</tr>
<tr>
<td>Examiner</td>
<td>1.1</td>
<td>1.2</td>
</tr>
<tr>
<td>Daily Mail</td>
<td>1.0</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Source: Experian Hitwise
# Spending & Channels

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
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<tbody>
<tr>
<td>Types of Email Sent, B2B v. B2C</td>
<td>Benefits of Social Media</td>
</tr>
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<tr>
<td>Above Average Cost per Lead</td>
<td>Top 10 Social Network Sites</td>
</tr>
<tr>
<td>Below Average Cost per Lead</td>
<td>Internet Usage by Youth</td>
</tr>
<tr>
<td>Cost per Click: Yahoo-Bing, Google</td>
<td></td>
</tr>
</tbody>
</table>
Outlook: 2011 marketing is new media

In terms of day-to-day business, “Outlook: 2011 Marketing,” a survey of B2B and B2C marketers from Multichannel Merchant, found, fundamentally, that new media have superseded the old.
67% Say Email More Important

February 2011, % of respondents
Source: Multichannel Merchant

Email, website metrics important tools

Also looking for cost-effective marketing tools, many respondents from the Multichannel Merchant survey use email as a marketing tool and wished they could improve their campaigns; 67.3% said that email-related metrics became more important to their business in the past year, This is up from 56.1% in the previous year's survey.
More Use of Practical Email Tools

Types of Email Sent, B2B v. B2C
February 2011, % of respondents
Source: Multichannel Merchant

Trigger emails on the rise

Of the respondents that conducted email marketing, 9 of 10 sent promotional messages, and 7 in 10 sent transactional emails (e.g., order confirmations). A growing percentage are using trigger emails such as birthday messages or cart abandonment follow-ups, with just more than 20% indicating that this was a practice they’ve done more frequently in the past year.
54% Increase Inbound Budget

Average Cost per Lead, Inbound vs. Outbound
2010 v. 2011, % of respondents’ costs by lead channel
Source: HubSpot

Businesses review cost-effective tools

In 2011, the average cost per lead for outbound-dominated businesses was $373, while inbound businesses reported their leads cost on average $143. 54% of those businesses surveyed for HubSpot’s “2011: The State of Inbound Marketing” are increasing their inbound marketing budgets.
When classifying each lead generation category as — below average cost, near average cost, or above average cost — businesses consistently ranked inbound marketing channels as having costs lower than outbound channels. PPC was the only inbound channel that was ranked among the outbound channels in terms of costs. Trade shows, PPC, direct mail and telemarketing were most frequently ranked as more expensive.
Blogs had the highest instance of being reported as a below average cost, with 55% of companies reporting this. The average budget spent on company blogs and social media increased from 9% in 2009 to 17% in 2011. Marketers, the survey found, are decreasing the portion spent on PPC, direct mail and telemarketing.
More on what is cost-effective for marketers, Marin Software and Razorfish studied paid-search performance before, during and after the transition that brought together Yahoo-Bing (i.e. August 15th to December 15th 2010). Pre-transition, Yahoo-Bing’s CPC was more or less identical to Google. However after the transition, Google’s CPC trended significantly higher than Yahoo-Bing.
### Top 10 Ad Focus Properties
by Unique Visitors (000) and % Reach, Jan. 2011

**Source:** comScore

<table>
<thead>
<tr>
<th>Property</th>
<th>Visitors (000)</th>
<th>Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Ad Network</td>
<td>197,076</td>
<td>93.1%</td>
</tr>
<tr>
<td>Yahoo! Network Plus</td>
<td>180,843</td>
<td>85.5%</td>
</tr>
<tr>
<td>AOL Advertising</td>
<td>179,956</td>
<td>85.0%</td>
</tr>
<tr>
<td>Yahoo! Sites</td>
<td>178,864</td>
<td>84.5%</td>
</tr>
<tr>
<td>Google</td>
<td>170,325</td>
<td>80.5%</td>
</tr>
<tr>
<td>Turn Media Platform</td>
<td>168,577</td>
<td>79.7%</td>
</tr>
<tr>
<td>ValueClick Networks</td>
<td>168,499</td>
<td>79.6%</td>
</tr>
<tr>
<td>24/7 Real Media</td>
<td>165,127</td>
<td>78.0%</td>
</tr>
<tr>
<td>AdBrite</td>
<td>156,061</td>
<td>73.7%</td>
</tr>
<tr>
<td>Facebook.com</td>
<td>153,020</td>
<td>72.3%</td>
</tr>
</tbody>
</table>

**Google Ad Network reach is 93%**

In terms of online advertising, the Google Ad Network led the January 2011 Ad Focus ranking with an impressive reach of **93.1% of Americans online**, followed by Yahoo Network Plus with an 85.5% reach, AOL Advertising with 85% and Yahoo Sites with 84.5%.

Facebook.com crossed into the top 10 for the first time in January 2011 with a 72.3% reach.
Google Use Tops Facebook by 40%

Google & Facebook Use
Base: US youth ages 8-21, Online more than 1 hr "yesterday," Feb. 2011
Source: Gallup / USA Today

Google used more than Facebook

Gallup data indicates men (42%) are about as likely as women (45%) to have a Facebook page. However, men (63%) are 12.5% more likely than women (56%) to say they visit Google in a given week. Overall, 40% more US adults say they use Google in a typical week (60%) than have a Facebook page (43%).
No doubt, the social media is booming, and of yet, there is very little negative backlash. A majority of US adults are using social media (65%), and a similar number say they have received a positive benefit from its use, a poll from Harris Interactive found. Example, one-quarter of Echo Boomers have found a job opportunity through social media (24%).
43% Encounter SocNet “Cons”

**Benefits of Social Media**
January 2011, US adults, answered "yes, frequently" or "yes, occasionally"
*Source: Harris Interactive*

**Social networks cause problems for some**
43% of social media users say they have been offended by posts, comments or pictures they’ve seen, and the quarter who say that unintended persons have viewed links or comments they’ve posted (26%). Some reported more serious consequences of getting in trouble with school or work, or losing a job opportunity. (7% for both).
Facebook Ad Recall 10% Higher

Top 10 Social Network Sites
by U.S. Market Share of Visits (%), March 2011
Source: Experian Hitwise

<table>
<thead>
<tr>
<th>Social Network Site</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>64.2%</td>
</tr>
<tr>
<td>YouTube</td>
<td>19.6%</td>
</tr>
<tr>
<td>MySpace</td>
<td>1.4%</td>
</tr>
<tr>
<td>Yahoo! Answers</td>
<td>1.2%</td>
</tr>
<tr>
<td>Twitter</td>
<td>1.1%</td>
</tr>
<tr>
<td>Tagged</td>
<td>0.8%</td>
</tr>
<tr>
<td>myYearbook</td>
<td>0.4%</td>
</tr>
<tr>
<td>Linkedin</td>
<td>0.4%</td>
</tr>
<tr>
<td>Mylife</td>
<td>0.4%</td>
</tr>
<tr>
<td>Club Penguin</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

Ad recall higher than standard homepage ad

Nielsen analyzed fourteen Facebook ad campaigns, and found that consumers who were exposed to a standard homepage ad on Facebook had 10% higher ad recall, 4% higher brand awareness and 2% higher purchase intent than consumers who were not exposed. When a Facebook homepage ad features social context (i.e., the ad includes a list of people on the viewer’s “friend list” who are registered fans of the brand or product), the increase in recall, awareness and purchase intent compared to non-exposed consumers is substantially higher than that caused by standard Facebook homepage ads.
# Users Average 5.5 Hours Monthly

**Top 10 Social Network Sites**

*Source: Experian Hitwise*

<table>
<thead>
<tr>
<th>Social Network</th>
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<tbody>
<tr>
<td>Facebook</td>
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<tr>
<td>MySpace</td>
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<td>Yahoo! Answers</td>
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<td>Twitter</td>
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<td>0.4%</td>
</tr>
<tr>
<td>Club Penguin</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

January 2011

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**Users Spend More Time with SocNets**

On average, global web users across 10 countries spent roughly *five and a half hours* on social networks in February 2010, up more than two hours from February 2009.
9 in 10 Youth Online 1+ Hours

Internet Usage by Youth
2006-2010, Base: US youth ages 8-21, Online more than 1 hr "yesterday" 2006-2010
Source: Harris Interactive

Every day, youth spend an hour-plus online

A Harris Interactive study on the internet habits of youth found that eight in 10 8-to-12-year-olds (79%) and nine in 10 13-to-24-year-olds (88% of 13-to-17-year-olds, 90% of 18-to-24-year-olds) spend an hour or more online on a typical day.

The average number of hours spent online daily increases with age, rising from 1.9 hours among 8-to-12-year-olds to 3.5 hours among 13-to-17-year-olds, topping at 4.5 hours among 18-to-24-year-olds.
Online Video & Mobile

- Top 10 Video Multimedia Sites
- Top 10 Video Sites by Ads Viewed
- Smartphone Penetration
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- Mobile Internet Time by Category
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- Top 10 Television Sites
- TV Programs for Ad-based Purchases
Gaining its share of some of this increased internet audience, the online video market continued to gain momentum in 2010, with an average of 179 million Americans watching video each month, according to a new white paper from comScore. Engagement levels also rose during the year, with viewers watching online videos more frequently.

Americans also spent about 12% more hours viewing online video in 2010 (14.2) compared the prior year (12.7) due to increased content consumption and more video ad streams. The average American streamed a record 201 videos in December 2010, up 8% from 187 a year earlier.
Top 10 Video Multimedia Sites
Source: Experian Hitwise

<table>
<thead>
<tr>
<th>Site</th>
<th>January 2011</th>
<th>February 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>75.5</td>
<td>76.6</td>
</tr>
<tr>
<td>Hulu</td>
<td>3.5</td>
<td>3.4</td>
</tr>
<tr>
<td>bing Videos</td>
<td>2.3</td>
<td>2.4</td>
</tr>
<tr>
<td>Fancast</td>
<td>1.2</td>
<td>1.1</td>
</tr>
<tr>
<td>Yahoo! Video</td>
<td>1.1</td>
<td>1.2</td>
</tr>
<tr>
<td>Apple iPod &amp; iTunes</td>
<td>1.1</td>
<td>1.0</td>
</tr>
<tr>
<td>Google Video</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>Mega Video</td>
<td>0.7</td>
<td>0.6</td>
</tr>
<tr>
<td>Daily Motion</td>
<td>0.6</td>
<td></td>
</tr>
<tr>
<td>MetaCafe</td>
<td>0.6</td>
<td></td>
</tr>
</tbody>
</table>

Three of the top 10 most-shared videos in February 2011 began as ads aired during the 2011 Super Bowl (Feb. 6, 2011). These include the top two videos, “Volkswagen Commercial: The Force” and “Chrysler Eminem Super Bowl Commercial: Imported from Detroit.”
The Marketing Data Box
MARKETING CHARTS

45% of Americans See Video Ads

Top 10 Video Sites by Ads Viewed
January 2011, Ads viewed (000)
Source: comScore

Online video ads reach 45% of population

As an ad market, online video is maturing as well, Americans viewed more than 4.3 billion video ads in January, according to comScore data. Hulu generated the highest number of video ad impressions at nearly 1.1 billion. Tremor Media Video Network ranked second overall (and highest among video ad networks) with 503.7 million ad views.

Time spent watching videos ads totaled 1.7 billion minutes during the month, with Hulu streaming the largest duration at 434 million minutes. Video ads reached 45% of the total US population an average of 32 times during the month.
In U.S., 31% Own Smartphones

One-third of consumers have smartphones

As of December 2010, nearly a third (31%) of all mobile consumers in the US owned smartphones. But smartphone penetration is even higher among mobile users who are part of ethnic and racial minorities in the US; namely Asian/Pacific Islanders (45%), Hispanics (45%) and African-Americans (33%), populations that also tend to skew younger. Meanwhile, only 27% of white mobile users reported owning a smartphone.
Younger phone owners like text feature

Younger mobile phone users definitely text far more often than older users, as the only other age group to average more than 1,000 texts per month is 0-12-year-olds (1,178). Text usage starts rapidly dropping among older age brackets, with 25-to-34-year-old mobile phone users sending and receiving an average of 758 per month. This number drops sequentially with each succeeding age bracket, hitting a low of 41 among mobile phone users 65 and older.
Email Leads Mobile Internet Time

Mobile Internet Time by Category
January 2011, % share of total mobile internet time
Source: The Nielsen Company

Email tops for mobile internet time

A look overall at how US consumers with mobile internet access spend their mobile online time, the study finds email represents a leading 38.5% of time spent. No other activity comes close, with social networking coming in a distant second (10.7%). This data comes from The Nielsen Company’s “State of the Media 2010.”
25% are “Avid” Phone Gamers

**Top 10 Mobile Phone Sites**
by U.S. Market Share of Visits (%), March 2011

*Source: Experian Hitwise*

- MocoSpace: 22.8%
- Myxer: 10.5%
- WeeWorld: 7.0%
- Your Pure Crush: 5.4%
- Cricket: 4.4%
- MySpace Mobile: 3.8%
- PhoneZoo: 3.1%
- Yahoo! Mobile: 2.4%
- Musica.com: 2.3%
- Boost Mobile - Media Mail: 2.1%

**44% have tried a mobile phone game**

More than half (52%) of 2,425 US and UK mobile phone owners surveyed have played a game on a mobile phone at some time in the past, according to a survey PopCap Games/Information Solutions Group (ISG). 44% of US respondents have played a mobile game at least once. In addition, about 33% of respondents have played a game on their mobile phone handset in the past month, and nearly a quarter (24.6%) have played in the past week, qualifying them as “avid mobile phone gamers.”
2011: Mobile Ads to Increase 60%

Top 10 Mobile Phone Sites
Source: Experian Hitwise

- MocoSpace: 23.9%
- Myxer: 11.35%
- WeeWorld: 7.11%
- MySpace Mobile: 5.30%
- MyTrafficMaps.net: 4.30%
- Your Pure Crush: 4.52%
- Cricket: 4.30%
- PhoneZoo: 3.19%
- Musica.com: 2.37%
- Yahoo! Mobile: 2.22%
- Fun For Mobile: 2.07%

January 2011
February 2011

Interest in mobile advertising has been catalyzed among large advertisers during the past year, and MagnaGlobal expects growth of 60.1% during 2011.
TV Will Hold 41% of All Ad Revenue

Worth noting, for now, that despite some pressure from the other “2 Screens” – a.k.a., competition from online and mobile, in 2011, TV will retain its global leadership of all media forms in terms of total revenues, including ad revenues, subscriptions, pay-per-view and license fees, according to Deloitte research. TV will account for about 41% of all ad revenues, and grow its share to 42% by 2012. TV ad revenue share grew close to 10% between 2007 and 2010, from 37% to more than 40%. Even playback does not make a dent. Data from a Nielsen Company study indicates that DVRs actually contribute significantly to commercial viewing. On a total US basis, DVR playback added a 16% lift to the average minute of primetime commercials.

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### Top 10 Television Sites
by U.S. Market Share of Visits (%), March 2011

**Source**: Experian Hitwise

<table>
<thead>
<tr>
<th>Television Site</th>
<th>Visits (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSNBC</td>
<td>7.5%</td>
</tr>
<tr>
<td>The Weather Channel - US</td>
<td>7.2%</td>
</tr>
<tr>
<td>CNN.com</td>
<td>4.7%</td>
</tr>
<tr>
<td>ESPN</td>
<td>4.7%</td>
</tr>
<tr>
<td>Hulu</td>
<td>4.6%</td>
</tr>
<tr>
<td>Fox News</td>
<td>2.8%</td>
</tr>
<tr>
<td>Yahoo! TV</td>
<td>2.6%</td>
</tr>
<tr>
<td>FOX Sports on MSN</td>
<td>2.3%</td>
</tr>
<tr>
<td>Nick (Nickelodeon)</td>
<td>2.1%</td>
</tr>
<tr>
<td>QVC.com</td>
<td>1.9%</td>
</tr>
</tbody>
</table>
## Top 10 Television Sites


*Source: Experian Hitwise*

<table>
<thead>
<tr>
<th>Site</th>
<th>Visits (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Weather Channel - US</td>
<td>8.74</td>
</tr>
<tr>
<td>MSNBC</td>
<td>6.71</td>
</tr>
<tr>
<td>Hulu</td>
<td>5.03</td>
</tr>
<tr>
<td>ESPN</td>
<td>4.24</td>
</tr>
<tr>
<td>CNN.com</td>
<td>3.99</td>
</tr>
<tr>
<td>Fox News</td>
<td>2.72</td>
</tr>
<tr>
<td>Yahoo! TV</td>
<td>1.94</td>
</tr>
<tr>
<td>FOX Sports on MSN</td>
<td>1.94</td>
</tr>
<tr>
<td>Home &amp; Garden Television</td>
<td>1.78</td>
</tr>
<tr>
<td>Foxsports NFL</td>
<td>1.73</td>
</tr>
</tbody>
</table>
Trust Meter: Local TV News is Third

**Local TV news trusted, ads reliable**

In terms of consumers, local TV news was found to be an effective medium for advertisers, according to a study from Frank M. Magid Associates, Inc. and Hearst Television. Viewers indicated that they find local news advertising to be trustworthy and relatable at higher rates than most other TV genres.

Products and services advertised during local TV news programs were ranked trustworthy by the third-highest percentage of respondents (16%), trailing entertainment talk shows (23%) and informational talk shows (27%).

---

### TV Programs for Ad-based Purchases

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informational talk shows</td>
<td>19%</td>
</tr>
<tr>
<td>Entertainment talk shows</td>
<td>14%</td>
</tr>
<tr>
<td>Local TV news</td>
<td>12%</td>
</tr>
<tr>
<td>Cable prime time</td>
<td>11%</td>
</tr>
<tr>
<td>Broadcast prime time</td>
<td>10%</td>
</tr>
<tr>
<td>Broadcast prime time</td>
<td>8%</td>
</tr>
<tr>
<td>Cable news</td>
<td>7%</td>
</tr>
<tr>
<td>Court shows</td>
<td>7%</td>
</tr>
<tr>
<td>Sitcom reruns</td>
<td>6%</td>
</tr>
<tr>
<td>Broadcast news</td>
<td>6%</td>
</tr>
<tr>
<td>Entertainment news</td>
<td>5%</td>
</tr>
<tr>
<td>Game shows</td>
<td>4%</td>
</tr>
</tbody>
</table>

*December 2010, Viewers of genre 2x a week or more*  
*Source: Hearst/Frank N. Magid Associates*
Retail & Consumer Goods

Economic Confidence Index
Outlook for Economy in 2011
Top Investment/Finance Sites
Online Retail Spending
Department Store Advertisers
Youth Influence and Purchases
Number of Online Content Buys
Economic Mood … Improving

Economy mood swings
Perhaps testament to the realities of the country’s financial growth economic confidence indices are still reflecting a shift in consumer perspective according to Gallup data. Gallup’s Economic Confidence Index averaged -31 over the first two weeks of December, fully offsetting November’s improvement to -24, and essentially matching the monthly readings of -29 in October and -33 in September.
58% Say 2011 Will be Better

Outlook for Economy in 2011
Base: % of adults, January 2011
Source: Gallup

With the turn of the year, perhaps buoyed by the holidays and new year cheer, Americans report considerably more optimism than pessimism about what it may bring. Fifty-eight percent of respondents say 2011 will be better than 2010, 20% say 2011 will be worse, and 21% say it will be the same.
By January, another Gallup poll revealed that forty-one percent of Americans said the economy is "getting better," up 17% from 35% in December 2010 and about 8% from 38% a year ago. This level of optimism ties for the highest since Gallup daily tracking began in January 2008.
Top 10 Investment/Finance Sites
Source: Experian Hitwise

January 2011

- Yahoo! Finance: 32.6%
- msn money: 7.0%
- Fidelity Investments: 4.7%
- Scottrade: 4.5%
- TD AMERITRADE: 3.7%
- CNN Money.com: 3.0%
- Charles Schwab: 2.8%
- The Wall Street Journal: 2.4%
- Yahoo! Message Boards: 2.1%
- E*Financial: 2.1%

February 2011

- Yahoo! Finance: 29.3%
- msn money: 6.2%
- Fidelity Investments: 4.9%
- Scottrade: 4.9%
- TD AMERITRADE: 3.9%
- CNN Money.com: 3.3%
- Charles Schwab: 3.0%
- E*Financial: 2.3%
- Yahoo! Message Boards: 2.2%
- The Wall Street Journal: 2.2%
Online Retail Hits Record $43.4B

As the mood picks up, so does consumer spending: US online retail spending reached a record $43.4 billion during Q4 2010, according to comScore. This figure is up 11% from $39 billion in Q4 2009 and 35% from $32.1 billion in Q3 2010. This marks the fifth consecutive quarter of positive year-over-year growth and second quarter of double-digit growth rates in the past year.
E-commerce growth below pre-recession level

Though this is an improvement, retail e-commerce growth rates are still significantly below those reported during 2007, which ranged from 17-23%. They are more in line with the respective 11% and 13% growth rates reported during the first two quarters of 2008 (the current recession is generally considered to have started in December 2007). However, comScore predicts continued double-digit year-over-year growth in US retail e-commerce spending for the upcoming quarters of 2011.
Overall self-reported daily consumer spending in stores, restaurants, gas stations, and online averaged $55 per day in the week ending Jan. 9, 2011, according to Gallup data. This is down 27% from the $75 average for the month of December 2010 (a post-holiday drop was expected), but also well below the $68 average for the same week in 2010.
Youth Carry $123.5B “Purse”

Youth Influence and Purchases
December 2010, (buy or influence others to buy) % of US youths aged 8-21
Source: Harris Interactive

Youth regain hold on purse strings

Youth spending may be on the rebound after declining earlier in the current recession.
Total spending among 8-to-21-year-olds was at $132.2 billion in 2007, which dipped to $112.8 billion by 2009, reports Harris Interactive. However, this year it is projected to reach $123.5 billion, a roughly 9% increase. Roughly four in 10 US consumers ages 8-24 will personally buy or influence the purchase of entertainment/sporting event tickets in the next month.
Nearly two-thirds of internet users (65%) have paid to download or access some kind of “intangible” online content. Music, software, and apps are the most popular content for pay-to-access or download according to a Pew study. Of them, nearly half (46%) have purchased only one or two of the types of content. The average expense for online content was approximately $47 per month, including both subscriptions (an average of $12 per month) and individual file access (an average of $22 per month).
Lifestyle & Community

Health Research by Age
Health Information Sites
Top 10 Politics Sites
Perception of Year Ahead
Top 10 Real Estate Sites
Community-based Organizations
Eight in 10 US internet users look online for health information making it, overall, the third most popular online pursuit among all those tracked by Pew.

Since one-quarter of adults do not go online, the percentage of online health information seekers is 59% among the total US adult population.
65% of Women Research Online

Online health research by age, gender, race

The study also found that women, non-Hispanic whites, younger adults, and those with higher levels of education and income are more likely to gather health information online. For example, 65% of women but 53% of men look up online health. Non-Hispanic whites (63%) have a higher rate than African-Americans (47%) or Latinos (45%). Also, 71% of 18-to-29-year-olds but only 29% of those 65 and older look up health information online. Pew says there are two forces at play in the data: simple access to the internet and general interest in health information. For example, women and men are equally likely to have access to the internet, but women are more likely than men to report gathering health information online.
44% of Adults Hope to Lose Lbs.

Results of a Harris Poll indicate that forty-four percent of US adults have made losing weight one of their resolutions for 2011.

Top 10 Health Information Sites
Source: Experian Hitwise

<table>
<thead>
<tr>
<th>Website</th>
<th>January 2011</th>
<th>February 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebMD</td>
<td>8.02</td>
<td>7.83</td>
</tr>
<tr>
<td>Yahoo! Health</td>
<td>5.89</td>
<td>7.82</td>
</tr>
<tr>
<td>RightHealth.com</td>
<td>5.54</td>
<td>5.13</td>
</tr>
<tr>
<td>Drugs.com</td>
<td>3.65</td>
<td>3.64</td>
</tr>
<tr>
<td>MedicineNet</td>
<td>3.52</td>
<td>3.57</td>
</tr>
<tr>
<td>MayoClinic.com</td>
<td>3.38</td>
<td>3.38</td>
</tr>
<tr>
<td>Everyday Health</td>
<td>2.37</td>
<td>2.26</td>
</tr>
<tr>
<td>AOL Health</td>
<td>2.23</td>
<td>2.05</td>
</tr>
<tr>
<td>HealthGrades</td>
<td>2.21</td>
<td></td>
</tr>
<tr>
<td>MSN Health</td>
<td>1.92</td>
<td></td>
</tr>
</tbody>
</table>

January 2011

February 2011
Top 10 Politics Sites
Source: Experian Hitwise

<table>
<thead>
<tr>
<th>Site</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Huffington Post</td>
<td>31.9%</td>
</tr>
<tr>
<td>Political News - FOXNews.com</td>
<td>8.0%</td>
</tr>
<tr>
<td>Politico</td>
<td>3.8%</td>
</tr>
<tr>
<td>CNN Political Ticker</td>
<td>2.6%</td>
</tr>
<tr>
<td>Free Republic</td>
<td>2.1%</td>
</tr>
<tr>
<td>Townhall.com</td>
<td>2.0%</td>
</tr>
<tr>
<td>Infowars.com</td>
<td>2.0%</td>
</tr>
<tr>
<td>JibJab</td>
<td>1.8%</td>
</tr>
<tr>
<td>Real Clear Politics</td>
<td>1.7%</td>
</tr>
<tr>
<td>Politics Daily</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Politics goes mobile

More than a quarter of American adults (26%) used their cell phones to learn about or participate in the 2010 midterm election campaign, according to findings from the Pew Research Center’s Internet & American Life Project. The mobile political user group is more male than female, young than old, better off financially than less well-off, and better educated than less well-educated. African-Americans are also more likely than whites or Hispanics to be in this group.
71% of Cell Phone Owners Votes

Source: Experian Hitwise

- The Huffington Post: 25.6%
- Politics Daily: 8.9%
- Political News - FOXNews.com: 8.3%
- Politico: 3.6%
- CNN Political Ticker: 2.9%
- Free Republic: 2.3%
- Infowars.com: 2.1%
- Townhall.com: 2.1%
- JibJab: 2.0%
- First Read: The Day in Politics: 2.0%

January 2011

- The Huffington Post: 24.8%
- Political News - FOXNews.com: 7.9%
- Politics Daily: 5.7%
- Politico: 3.9%
- JibJab: 2.9%
- CNN Political Ticker: 2.7%
- Free Republic: 2.3%
- Real Clear Politics: 2.2%
- Townhall.com: 2.1%
- Infowars.com: 1.9%

February 2011

14% of all American adults used their cell phones to tell others that they had voted. Some 71% of cell owners voted in the election, so that amounts to 27% of the mobile phone users who voted.
Looking ahead to next year, most Americans (55%) say that 2011 will be better than 2010, while 31% say the coming year will be worse. But there was even more optimism at the start of this year: In January, 67% said that 2010 would be a better year than 2009. Considering a Democrat is currently president, it is not surprising that a much higher percentage of Democrats (67%) think 2011 will be better than 2010, compared to 41% of Republicans and 54% of Independents.
Still 22% Have Mortgage Issues

A Harris Poll finds that fully 22% of people with mortgages are having difficulty meeting their mortgage payments, including 7% who are having “a great deal of difficulty”. Furthermore, 21% of those with mortgages are “underwater.” However, these numbers are somewhat lower than they were in March 2010. Those having difficulty paying off their mortgages have declined 24%, from 29% to 22%. Those having a great deal of difficulty are down 36%, from 11% to 7%. Furthermore, at this time last year, 24% of those with mortgages thought they were underwater, 12.5% higher than the number now.

Top 10 Real Estate Sites
by U.S. Market Share of Visits (%), March 2011
Source: Experian Hitwise

- Realtor.com: 6.5%
- Yahoo! Real Estate: 6.0%
- Zillow: 5.4%
- Trulia.com: 4.6%
- Rent.com: 2.6%
- Homes.com: 2.3%
- MSN Real Estate: 1.7%
- AOL Real Estate: 1.7%
- ZipRealty: 1.6%
- Apartment Guide: 1.5%
Top 10 Real Estate Sites
Source: Experian Hitwise

Yahoo! Real Estate 6.58
FrontDoor Real Estate 5.78
Realtor.com 5.71
Zillow 4.21
Trulia.com 3.65
Rent.com 2.57
Homes.com 2.19
ZipRealty 1.81
MSN Real Estate 1.62
Apartment Guide 1.57

January 2011

Yahoo! Real Estate 6.24
Realtor.com 5.87
Zillow 4.94
FrontDoor Real Estate 4.49
Trulia.com 4.12
Rent.com 2.52
MSN Real Estate 2.37
Homes.com 2.19
ZipRealty 1.66
Apartment Guide 1.39

February 2011
Lives “Overall” a Little Better

Well-Being Index improves for 2010

Americans' Well-Being Index score improved to an average of 66.8 in 2010 from 65.9 in 2009 and 2008, according to Gallup-Healthways Well-Being Index data. This year-over-year increase in overall wellbeing reflects increases across five of the six key areas of wellbeing, with the largest gains in how Americans evaluate their lives overall. Although overall Well-Being Index scores mostly show improvement between 2009 and 2010, monthly scores reveal that Americans’ higher level of well-being in 2010 resulted from relatively better scores in the first half of the year.

Top 10 Community-based Organizations
by U.S. Market Share of Visits (%), March 2011
Source: Experian Hitwise

1. The Animal Rescue Site - 19.0%
2. AARP - 17.0%
3. Care2 - 5.7%
4. We-Care.com - ASPCA - 4.6%
5. Khan Academy - 1.8%
6. AVERT - 1.7%
7. ASPCA - 1.5%
8. American Red Cross - 1.4%
9. Angel Food Ministries - 1.4%
10. Idealist.org - 1.2%
The top 100th of 1% of the wealthiest Americans, now make an average of $27 million per household, according to Mother Jones analysis. In contrast, the average income for the bottom 90% of the US population is $31,244.
The all-in-one marketing software platform for small- and medium-sized businesses.

Simple and integrated to help your company:

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- Convert more visitors into leads and customers
- Nurture and close those leads efficiently
- Make smart marketing investments

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