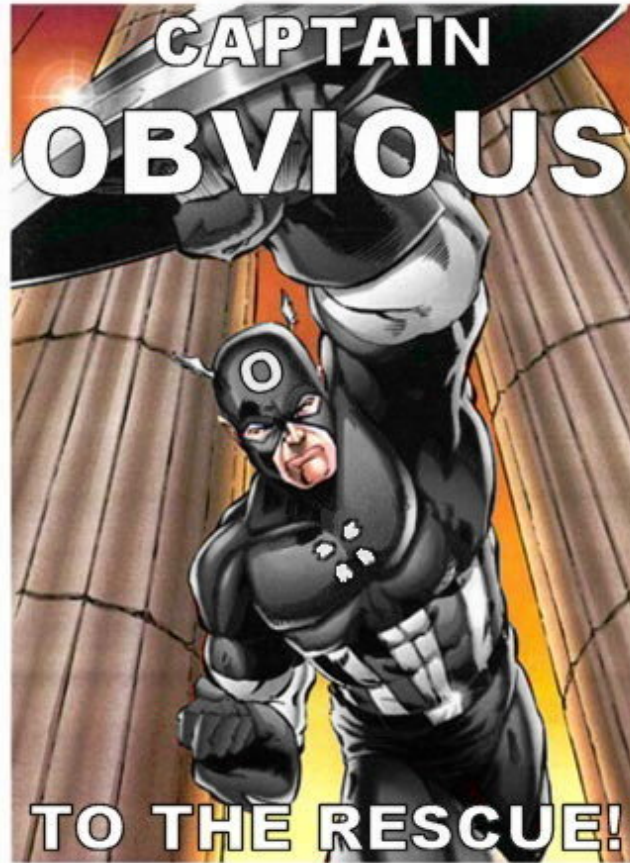




## Driving Digital Agency Services Success

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# What We Already Know



# Massive Opportunity...and Growing!

## Digital Marketing Services

Digital Service Category	2016 Forecasted Spend
☆ Web Hosting	\$34,683,001,392
☆ Website Design / Maintenance	\$26,696,959,330
SEO	\$5,922,955,282
Online Video Production	\$2,415,789,877
Mobile Media Management	\$2,847,959,725
App Design	\$1,361,356,612
Online Consulting & Research	\$877,075,776
Online Advertising Management	\$1,293,755,012
★ Social Media Management	\$2,184,556,245
Online Agency / Exchange Fees	\$670,199,102
★ Reputation Management	\$1,340,284,435
Opt-In List Management	\$997,896,770
Display Ad Design	\$337,443,377
Email Management	\$242,478,430
★ Listings Claiming (Pay Per Call, Call Tracking)	\$809,193,028
Digital Press Release Distribution	\$259,890,182
Blog Development	\$42,210,307
Online Contest / Game Development	\$50,545,194
Email List Purchase	\$147,010,743
Site Visitor Analysis	\$1,336,863,092
<b>TOTAL</b>	<b>\$84,517,423,911</b>

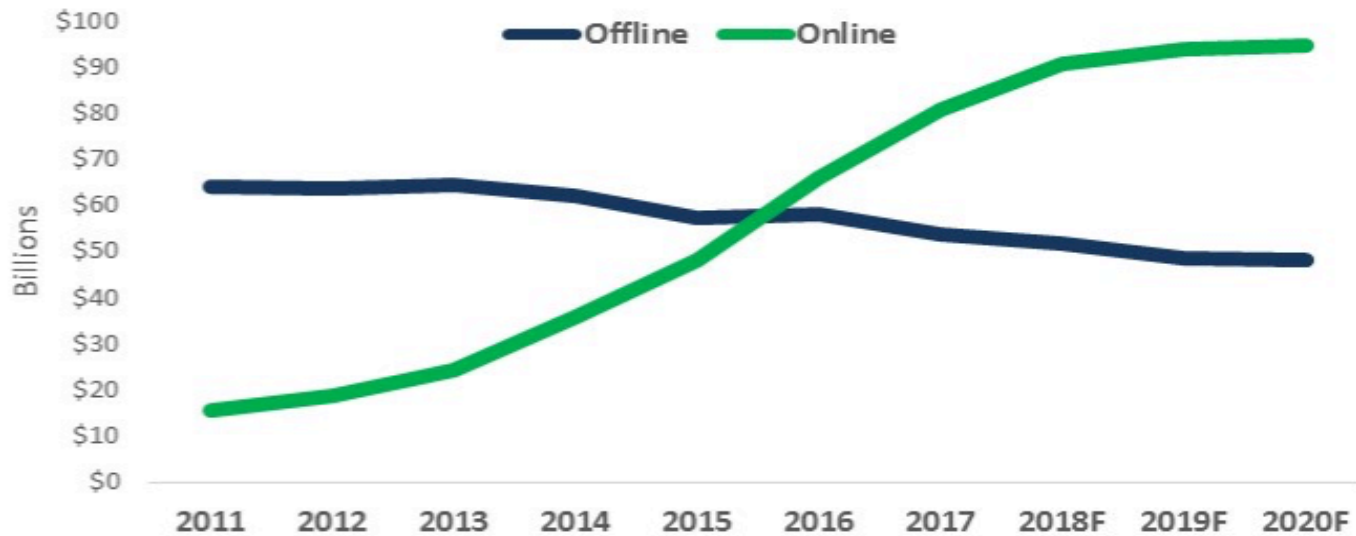
(source: Borrell Associates)



# Massive Opportunity...and Growing!

## Digital Advertising

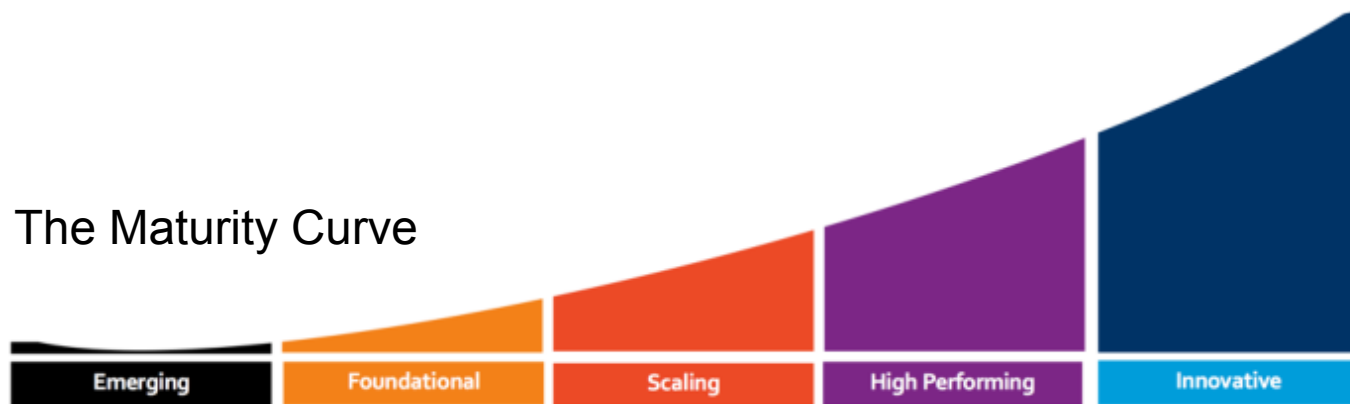
*Local Offline vs. Local Online Advertising*



# We're Not Alone



# What's Less Obvious: We're Still Pretty New at This



71% of Media Agencies are less than 5 years old

*(source: Borrell Associates)*

# Optimizing Across Many Dimensions



Branding / Market Positioning



Sales: Structure / Training / Hiring & Compensation



Product Selection & Media Mix



Build vs. Outsource



Fulfillment



PROFITABILITY