Key Trends to Watch for in 2008

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Web 2.0 Biz Conference
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Key Events in 2007

Online Advertising Growth

Global Ad Spending = $630B in C2007E, +4% Y/Y

- 10% of US advertising online ($21B) in C2007E vs. 4% in C2002 and 17% in C2012E
- US online advertising +26% Y/Y growth vs. industry growth of +4% in C2007E
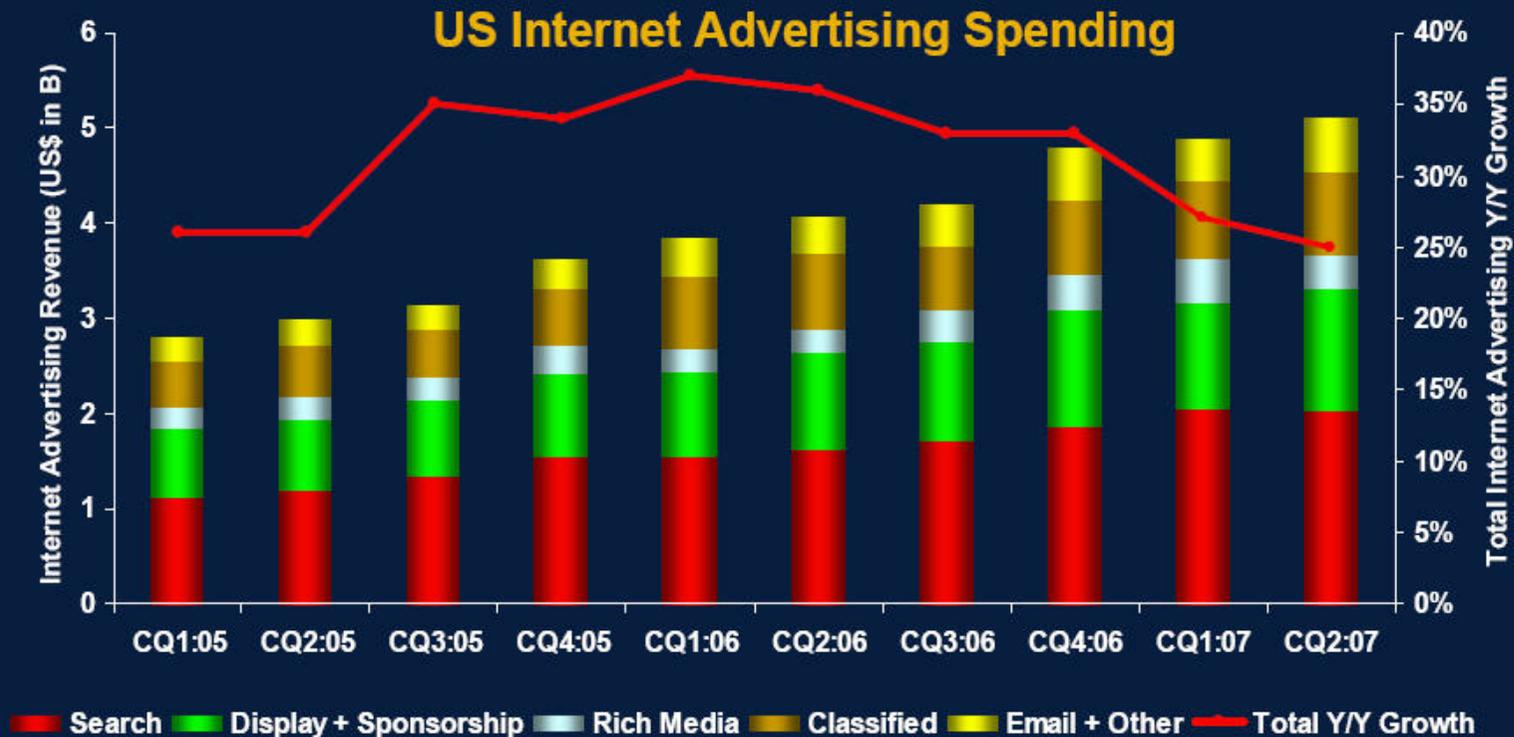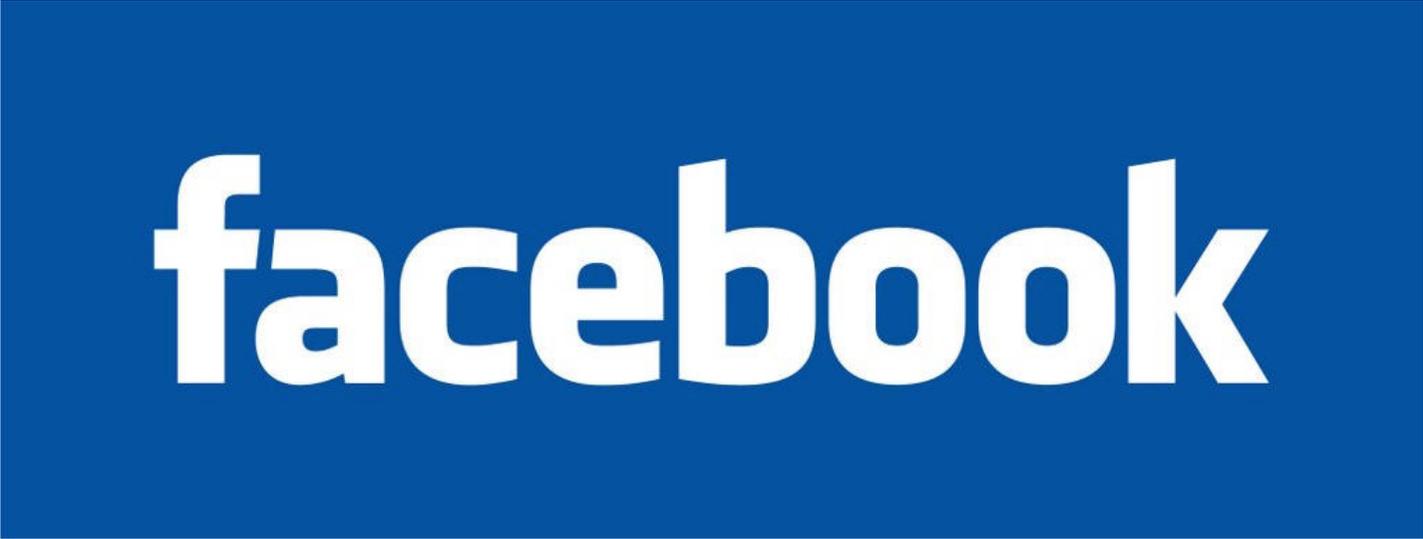
US Internet Advertising Spending

Legend: Search · Display + Sponsorship · Rich Media · Classified · Email + Other · Total Y/Y Growth

Left axis: Internet Advertising Revenue (US$ in B), 0–6
Right axis: Total Internet Advertising Y/Y Growth, 0%–40%
X-axis: CQ1:05, CQ2:05, CQ3:05, CQ4:05, CQ1:06, CQ2:06, CQ3:06, CQ4:06, CQ1:07, CQ2:07

Source: Universal McCann, Internet Advertising Bureau (IAB), Morgan Stanley Research

Importance of Social

Importance of Platform

Importance of Transparency
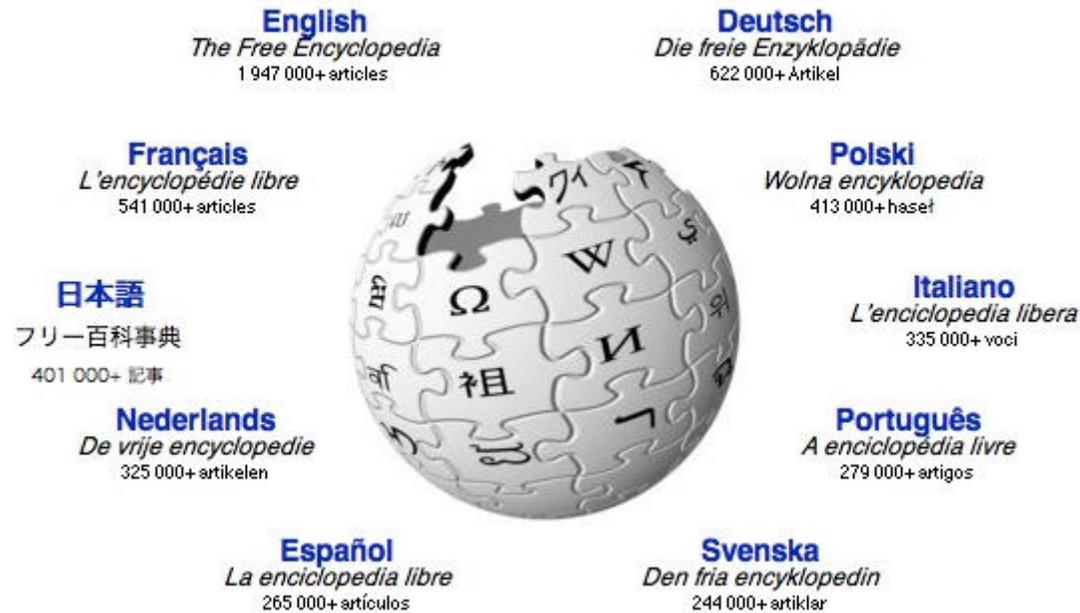
Importance of User Participation

Importance of Trusted Knowledge

Power of Search

Importance of User Experience

Importance of Scale

Cloud Computing

"Next Battlefield"

Amazon Kindle

"Breakthrough in Business Model"

Apple iPhone

"Changing how people use mobile web"

Key Trends in 2008

Social Communications

## *"Being Connected"*

Who will win Search?

General vs Vertical

Machine vs Man

Platform – Web OS

"APIs, APIs, APIs"

Openness

"Closed is Evil. Open is Good"

Write Once, Run Everywhere

"The world is your stage"
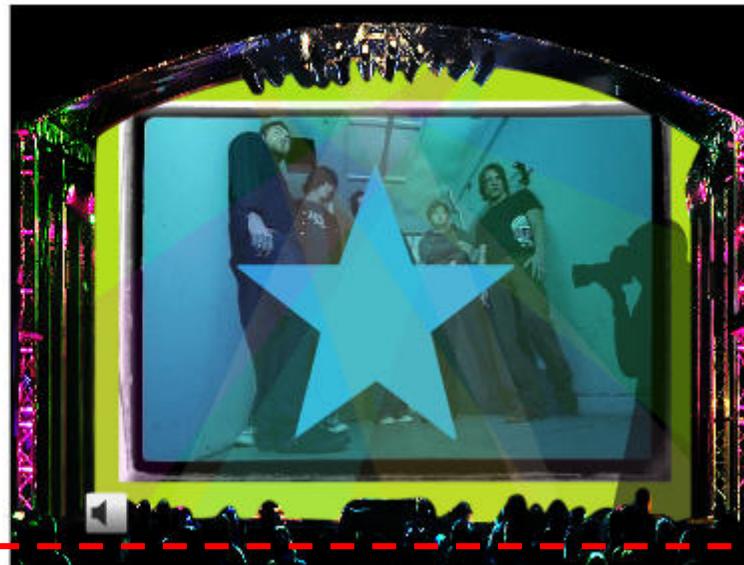
Moving Beyond the PC

"Internet Enabling Everything"

Online + Offline

"Making the network invisible"
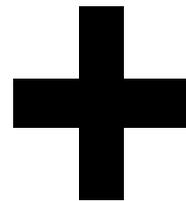
Survival

Key Implications for Internet Businesses

Questions to Think about in 2008

- How to reduce cost by leveraging the cloud

- How to leverage networks to increase usage

- How to leverage ad networks to generate revenue

- How to create competitive advantage in my content

- How to leverage open standards to improve my service

- How to better engage my users in conversations

Google | Thank you.

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