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TOP U.S. WEB SITES ENJOY HIGH VISITOR RETENTION RATES, BUT FACE SIGNIFICANT AUDIENCE OVERLAP WITH COMPETITORS, ACCORDING TO NIELSEN//NETRATINGS

Competitive Visitation Common among Leading Search Engines

NEW YORK – August 30, 2007 – Nielsen//NetRatings, a global leader in Internet media and market research, announced today that the leaders in three key Web categories – search, career development and multi-category travel – enjoyed high month-over-month visitor retention rates from June to July, but also experienced significant audience overlap with the other top players in their categories.

Search Providers

Among the categories, search providers had the highest visitor retention rates, with an average of 71 percent of June visitors at home returning in July among the three leading search players. Google Search led with a retention rate of 79 percent, followed by Yahoo! Search at 69 percent and MSN/Windows Live Search with 65 percent (see Table 1). Visitor retention rates were slightly higher among the work audience, with an average of 76 percent among the three leading search providers.

Table 1: Audience Retention Rates and Competitive Overlap for Search Providers, July 2007 (U.S.)

Site	Home Retention Rate	Work Retention Rate	Audience Overlap
Google Search	79%	85%	63%
MSN/Windows Live Search	65%	72%	84%
Yahoo! Search	69%	70%	78%

Source: Nielsen//NetRatings

Notably though, a substantial portion of visitors went to more than one of these three search sites in July. MSN/Windows Live Search had the highest audience overlap, with 84 percent of its unique visitors also going to Google Search, Yahoo! Search, or both. Yahoo! Search had a 78 percent audience overlap with Google and/or MSN, while Google Search had a 63 percent audience overlap with one or both of its two primary competitors.

“These search providers are doing a good job of bringing their visitors back month after month, which is an important sign of the health of their customer relationships and a measure with significant financial implications, given the expense of acquiring new customers,” said Ken Cassar, chief analyst, Nielsen//NetRatings.

“But the Web is a highly competitive marketplace because of the ease of comparison ‘shopping’ online. Even Web sites with established and loyal audiences have to continually innovate to stay ahead. Google stepped into a highly competitive market when it first launched, and armed with a better mousetrap, it quickly became the company to beat. Given the high degree of competitive sampling in the search business, it is conceivable that it could happen again,” Cassar said.

Career Development Sites

The top three sites in the career development category, CareerBuilder Network, Monster and Yahoo! HotJobs, experienced a similar phenomenon, although to a lesser degree. They had an average month-over-month audience retention rate of 38 percent at home; at work, it was 44 percent. Monster.com had the most audience overlap with the other two, at 50 percent. Yahoo! HotJobs had a 45 percent audience overlap, while CareerBuilder Network’s was 34 percent.

Table 2: Audience Retention Rates and Competitive Overlap for Career Development Sites, July 2007 (U.S.)



Site	Home Retention Rate	Work Retention Rate	Audience Overlap
CareerBuilder Network	43%	55%	34%
Monster	37%	47%	50%
Yahoo! HotJobs	35%	31%	45%

Source: Nielsen//NetRatings

Travel Sites

Compared to the other two categories, the top sites in multi-category travel, Expedia, Orbitz Worldwide Network and Travelocity, had the lowest average month-over-month at home visitor retention rates, at 31 percent. At work it was slightly higher, at 35 percent. Audience overlap was fairly similar between the three properties, at 59, 58 and 51 percent for Orbitz Worldwide Network, Travelocity and Expedia, respectively.

“Search is a daily online activity for most Web users, so search providers can rely to a certain extent on frequency of use as a driver of repeat visitation,” said Cassar. “Career development and travel sites are used less frequently, so their challenge is to be top of mind when it comes time to look for a new career opportunity or plan a trip.”

Table 3: Audience Retention Rates and Competitive Overlap for Multi-Category Travel Sites, July 2007 (U.S.)

Site	Home Retention Rate	Work Retention Rate	Audience Overlap
Expedia	34%	34%	51%
Orbitz Worldwide Network	27%	32%	59%
Travelocity	32%	39%	58%

Source: Nielsen//NetRatings

About Nielsen//NetRatings

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