Nielsen//NetRatings

A global leader in Internet media and market research

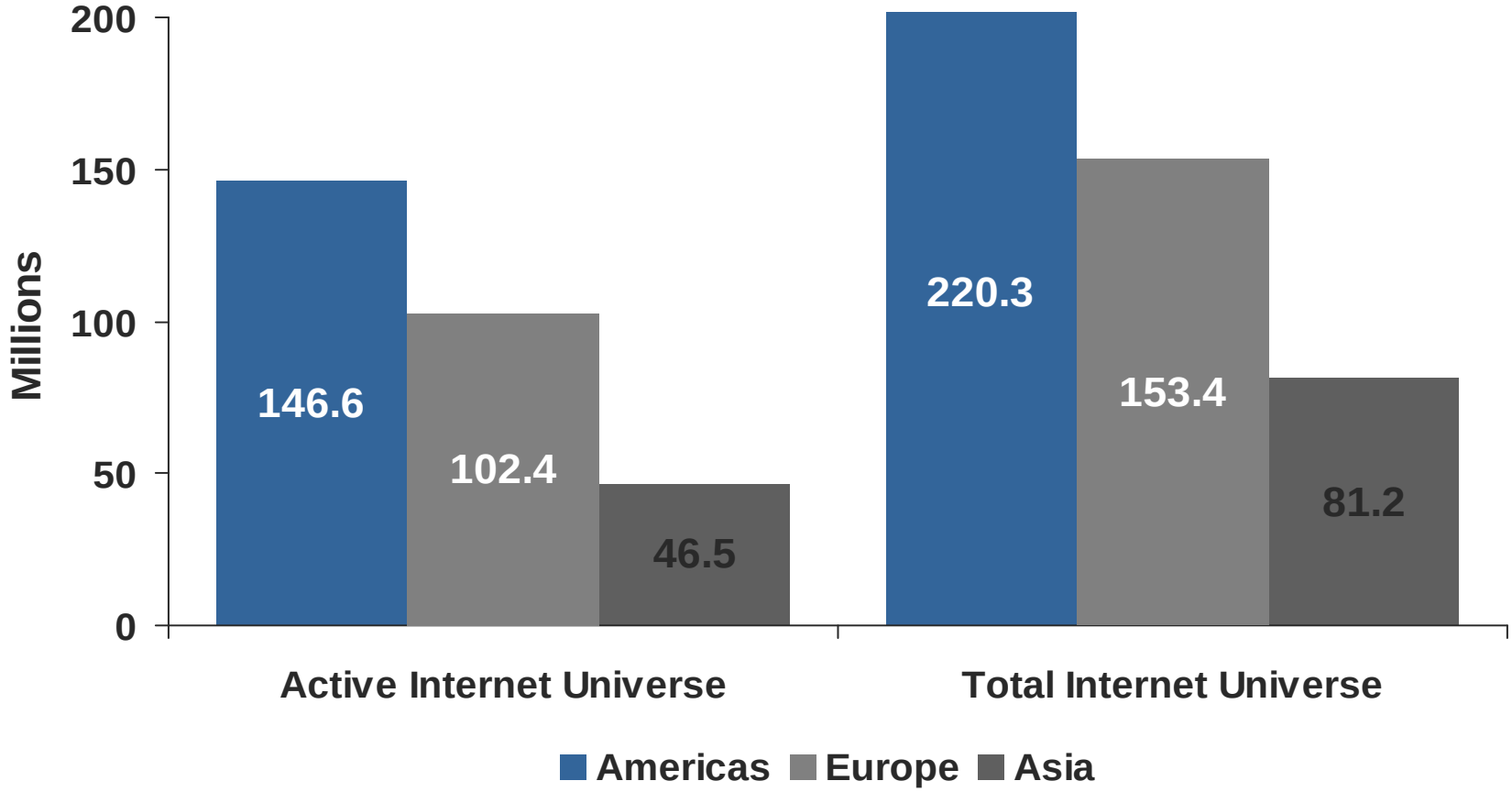
State of the Net in 2005

Observations of Internet Behavior & Trends

Usage Trends

Global Universe Estimates

295 million active users globally
455 million connected globally



Source: Nielsen//NetRatings, Apr. 2005, (@Home)

Global Usage

	April 2005
Number of Sessions per Month	31
Number of Domains Visited	62
Page Views per Month	1,151
Page Views per Suring Session	37
PC Time per Person	25:48:46
Time Spent During Surfing Session	0:50:26
Duration of a Web Page Viewed	0:00:43
Active Internet Universe (millions)	295.5
Current Internet Universe (millions)	455.0

Source: Nielsen//NetRatings, Apr. 2005, (@Home)

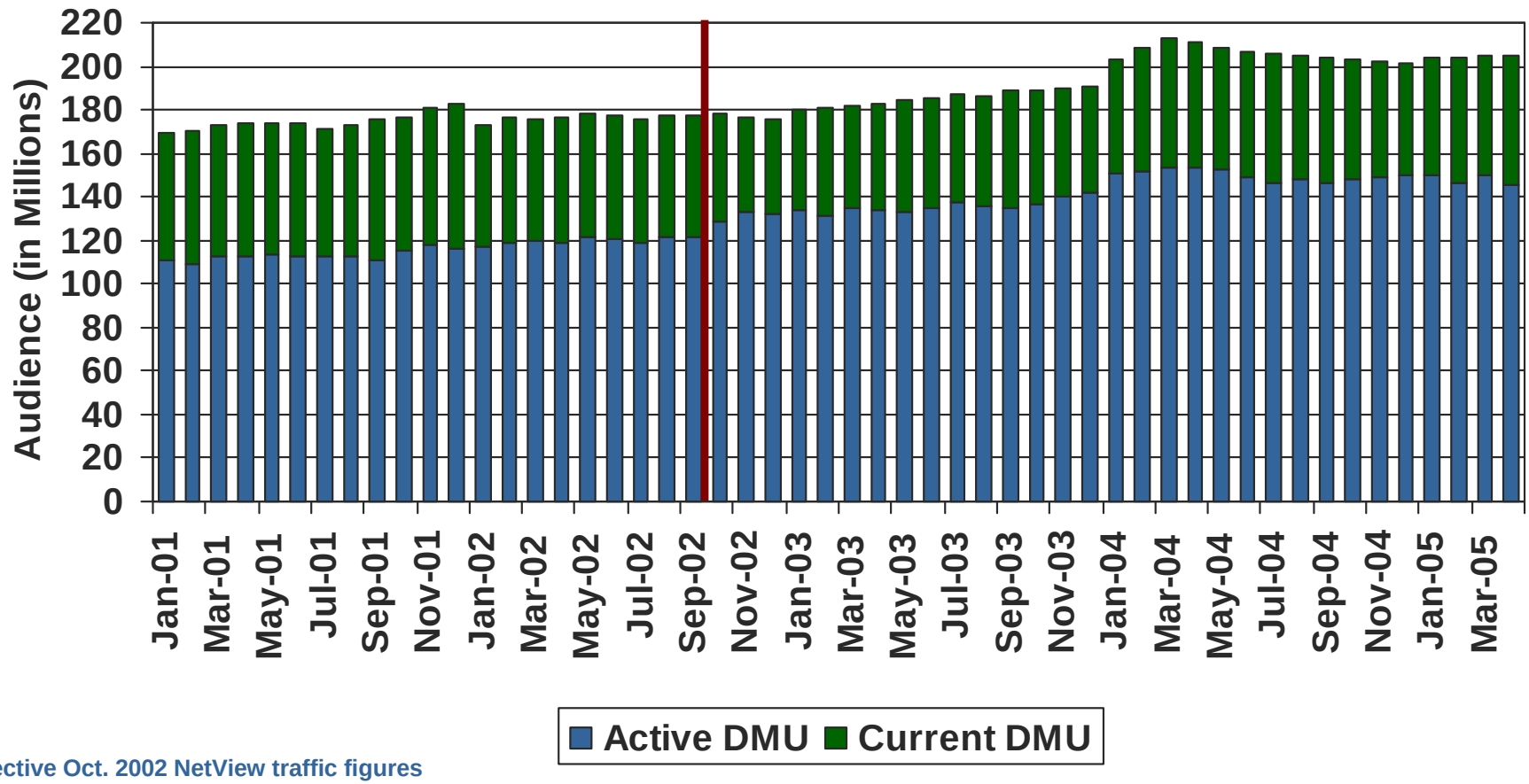
U.S. Usage Levels - August 2005

Internet Penetration (2+) Flat From Aug. 04 at 74%; Indications of More Engaged Population

	Home & Work		Home Only	Work Only
Sessions/Visits per Person	+8%	57	34	69
Domains Visited per Person	+17%	101	61	121
Web Pages per Person	+30%	2,066	1,183	2,470
Duration of a Web Page Viewed		00:00:50	00:00:48	00:00:54
PC Time per Person	+14%	59:58:47	30:15:00	84:24:02
Active Digital Media Universe		150,618,335	140,589,403	56,646,162
Current Digital Media Universe Estimate		206,539,874	203,274,683	60,179,980

Source: Nielsen//NetRatings – NetView, August 05

Internet Audience Trend



* Effective Oct. 2002 NetView traffic figures now incorporate "Browser Channels" and Internet Applications Tracking with regular web traffic data. This change resulted in an increase in various metrics. These data should not be trended against previous periods.

Source: Nielsen//NetRatings, Apr. 2005, (Home & Work)

Top 15 DMAs Ranked by Penetration

Year-Over-Year % Changed Relatively Flat; No Change (+/-) 5%

DMA	Internet Penetration (2+) Aug-05	Index to Online US Population	2004 % Change
Total US	74%	100	0%
Washington DC	84.7%	115	3%
San Francisco	84.0%	114	-2%
Seattle	83.6%	114	-4%
Portland	81.7%	111	1%
Atlanta	81.1%	109	1%
Detroit	80.3%	108	1%
Denver	80.3%	108	-5%
Salt Lake City	80.0%	108	0%
Orlando	79.8%	108	0%
San Diego	79.8%	108	5%
New York	79.3%	107	2%
Hartford/New Haven	78.9%	107	-2%
Boston	78.5%	107	-3%
Sacramento	77.8%	105	-4%
Nminneapolis	77.7%	105	0%

Source: Nielsen//NetRatings, August 2005 (@Home)

Online Demographics Moving Mainstream

Demographic Category	Internet Penetration %	Total US %	Online Index
Age Gender			
M/F 2-17	24.0%	23.0%	104
M/F 18-24	10.3%	10.0%	103
M			
F			
M			
F			
M/F 55+	19.6%	23.2%	84
Hispanic Identity			
Spanish/Hispanic Latino	9.4%	13.5%	70
Not Spanish/Hispanic/Latin	90.6%	86.5%	105
Education			
Less Than High School	7.9%	14.7%	54
High School Graduate	26.3%	29.8%	88
Some College	30.6%	27.2%	113
College Graduate	35.1%	28.3%	124

- Gender: Split is In-Line with Overall US Population (US Census)
- Income: More Concentrated in Higher Income HHs than US Population (US: $50K + = 43% of Pop, compared to 60% of Internet Population)

Source: Nielsen//NetRatings Internet Panel Universe Estimates, Aug. 2005

Top 10 Online Brands By Unique Audience (000)

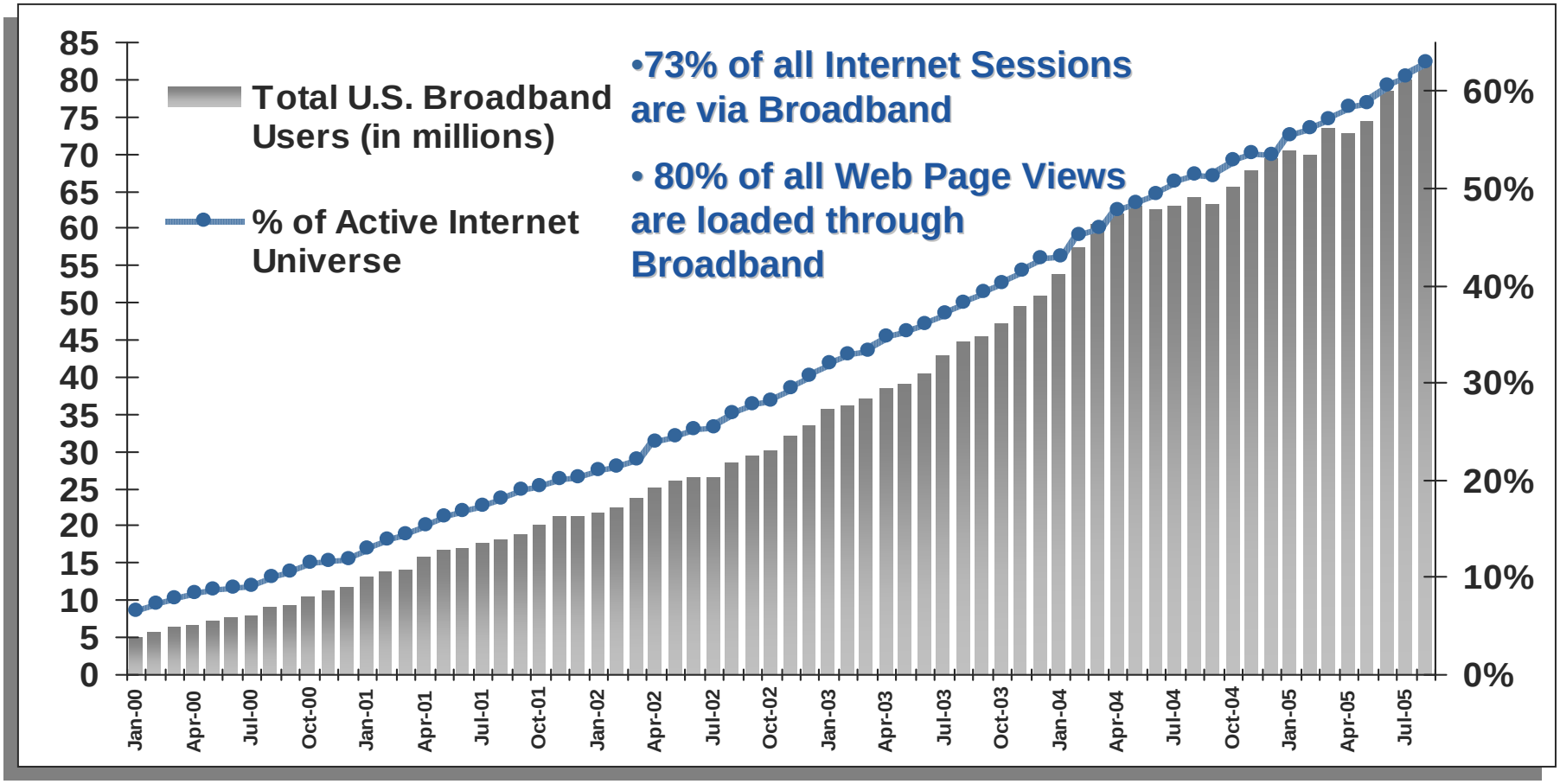
Google, Real & Weather Channel Had the Biggest % Increase from August 04

Brand	Unique Audience (000)		Year-Over-Year % Change
	Aug-05	Aug-04	
TOTAL:	144,369	140,171	3%
Yahoo!	101,283	92,857	9%
Microsoft	95,621	88,305	8%
MSN	92,059	93,473	-2%
Google	80,354	63,053	27%
AOL	75,721	64,363	18%
eBay	55,181	48,555	14%
MapQuest	38,959	35,432	10%
Amazon	37,644	31,104	21%
Real	36,362	30,192	20%
Weather Channel	31,176	26,709	17%

Source: Nielsen//NetRatings NetView, August 2005 (Home&Work)

Broadband Trends

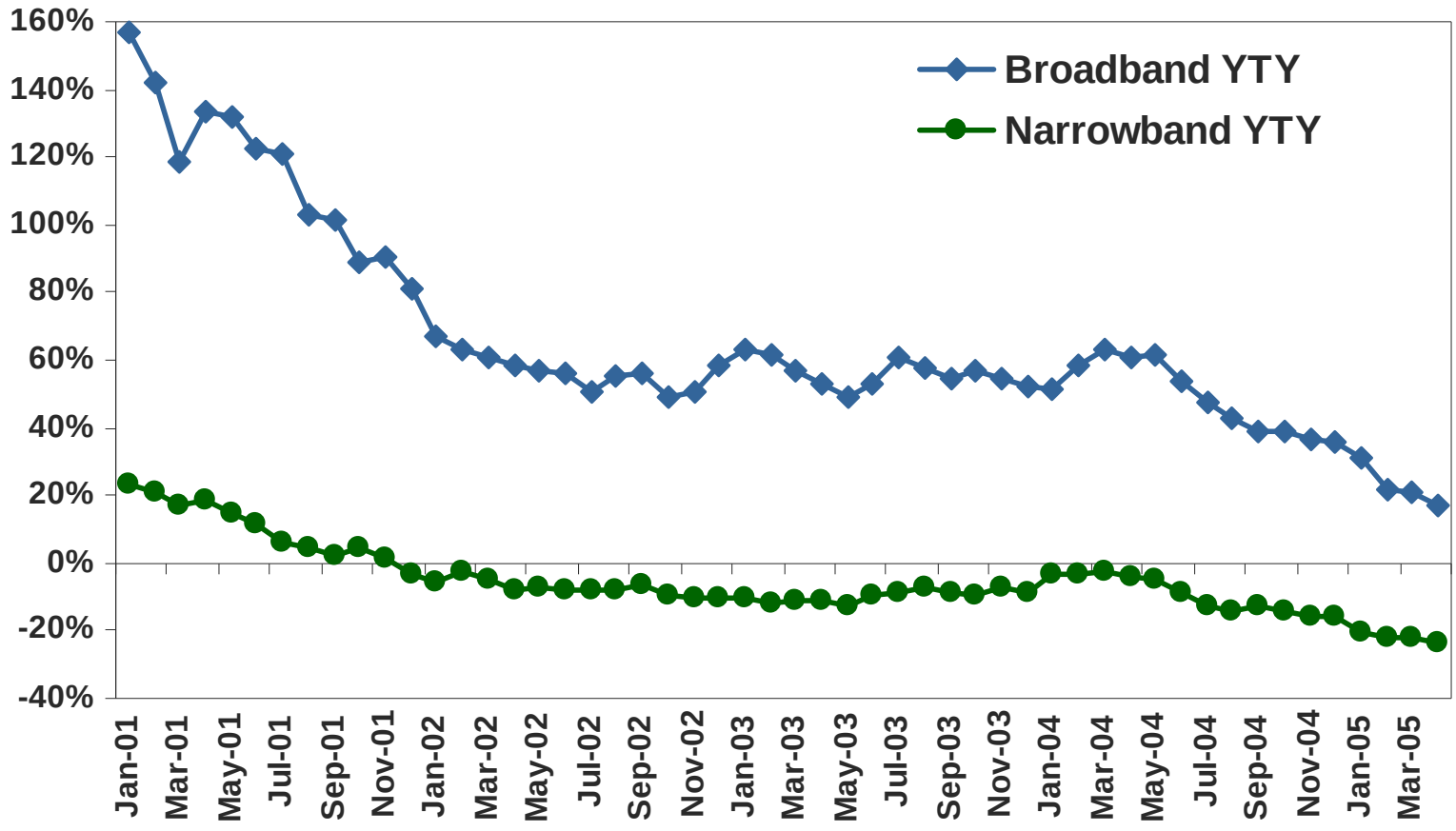
Over 62% of Active Internet Users Are Now on Broadband



Source: Nielsen//NetRatings NetView, August 2005 (At Home)

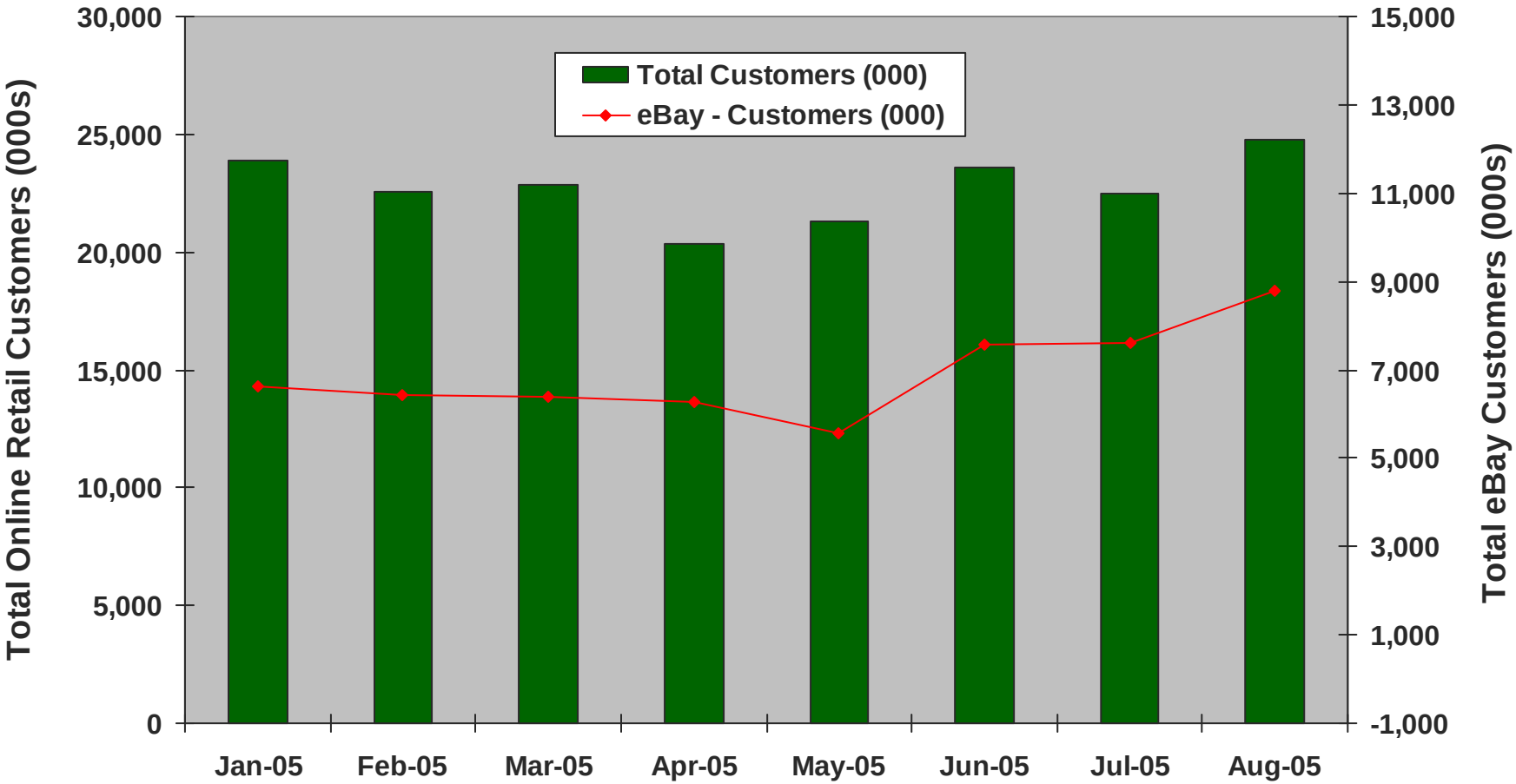
Broadband Growth Plateau

Year to Year % Growth



Source: Nielsen//NetRatings, Apr. 2005, (@Home)

1/3 of all online buyers have purchased from eBay during 2005



Source: Nielsen//NetRatings, MegaView Retail, Jan to Aug 2005

Toys & Apparel: eBay's top selling categories in August

Online Shopping by Vendor Rank - US August 2005

Retailer Profile: eBay

Product Category	% of Purchases	% of Customers	% of Spending
Toys, Games & Hobbies	31.7	25.3	9.8
Hobbies	22.2	15.7	6.8
Toys & Games Excl Video Games	7.7	8.6	2.4
Video Games	1.8	3.8	0.6
Apparel & Accessories	17.3	21.5	4.1
Women's Apparel	6.5	9.1	1.6
Children's / Baby Apparel	5.4	5.8	0.9
Accessories	2.8	6.3	0.9
Men's Apparel	2.5	4.7	0.8
Home & Garden	11.6	22.2	7.5
Housewares	6.5	12.0	2.9
Other Home & Garden	2.6	6.4	1.6
Home Improvement / Gardening / Hardware	1.2	3.3	0.8
Small / Large Appliances	0.7	2.3	1.6
Pet Supplies	0.4	1.3	0.2
Furniture	0.2	0.6	0.4
Books	7.3	14.7	3.6
Jewelry & Watches	6.7	8.2	2.9
Consumer Electronics	4.5	11.7	6.4
Telecommunications Equipment	1.3	4.1	1.2
Home / Car Audio, Stereo, TV / VCR / DVD Equipment	1.3	4.2	3.3
Photographic Equipment	1.1	2.6	1.5
Other Consumer Electronics	0.8	1.6	0.3
DVD / Video	3.8	7.4	0.8
Health/Wellness/Beauty	3.4	7.7	1.2
Automotive	2.6	7.5	51.8
Car Parts / Informational Guides	1.8	4.8	2.8
Car Accessories	0.5	1.6	0.3
Other Automotive	0.3	0.9	2.1

Source: Nielsen//NetRatings, MegaView Retail, Aug 2005