



# **The Future of Hosted Services**

**Web Hosting Talk's Research Revealed**

**2008 Survey Results**

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**Table of Contents:**

<b>About iNet Interactive &amp; WebHostingTalk</b>	<b>3</b>
<b>Contact Information</b>	<b>4</b>
<b>Executive Summary</b>	<b>5</b>
<b>Methodology</b>	<b>7</b>
<b>Consumer Responses – Aggregate Results</b>	<b>8</b>
<b>Consumer Responses – Representing Yourself</b>	<b>18</b>
<b>Consumer Responses – Small Office / Home Office</b>	<b>23</b>
<b>Consumer Responses – Small / Medium Sized Business</b>	<b>28</b>
<b>Provider Responses– Aggregate Results</b>	<b>33</b>
<b>Provider Responses – Small Hosting Company / Reseller</b>	<b>41</b>
<b>Provider Responses – Mid-Sized Hosts</b>	<b>45</b>
<b>Provider Responses – Large Hosts</b>	<b>49</b>

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## About iNet Interactive & Web Hosting Talk



With 195,000 members, three million monthly page views, and over 5.1 million total posts, Web Hosting Talk is the Internet's largest community focused on hosted services and the infrastructure that makes the Internet work.

It is the hosting industry's gathering place, where industry experts discuss critical issues with their peers and help consumers and small businesses select and buy appropriate technologies and services.



***The Premier online media network serving the hosting industry.*** We operate and manage some of the most prominent internet service and web development properties on the Internet. Nearly all of our media properties are the trusted authorities

within their respective industries—providing timely, accurate, and hard-to-find information aimed at helping consumers make more informed buying decisions.

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## Contact Information

Whether you are looking for customers for your hosting service, need a steady stream of qualified leads, or are trying to introduce new brands or services, our network has the solution for you!

### Global Accounts

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Visit us at [www.inetinteractive.com](http://www.inetinteractive.com)



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## Executive Summary

In partnership with HostingCon, iNET Interactive surveyed the community of Web Hosting Talk to better understand what's *really* happening in the hosted services industry – both in terms of what consumers of hosted services want and what providers are delivering.

A total of 390 people responded to the survey. 46% of respondents identified themselves as consumers of hosted services. 54% of the respondents identified themselves as providers of hosted services.

### What Consumers Want

The factors that are of extreme importance to consumers in 2008 when choosing a hosted services provider are reliability (80%), security (61%) and support (57%). Although they were the top concerns among consumers, the importance of security decreased by 10% over in 2008 over 2007 while reliability (-3%) and support (-3%) saw smaller decreases.

Cost is becoming a bigger issue with consumers in 2008 There was an 8% increase over 2007 in consumers ranking it extremely important (8%) and in consumers ranking it as important (4%).

Far fewer consumers are planning on purchasing shared hosting in the next 12 months (-15%) than in 2007. However, more consumers are planning on purchase advanced hosting solutions in 2008 over 2007, with dedicated (13%), VPS (5%) and co-location (4%) seeing significant gains.

When considering the importance of hosted applications as a value-added service, social networking platforms lead the way, with 49% of respondents identifying the hosted application as extremely important or important.

Both blogging (10%) and social networking (7%) applications gained in extreme importance for consumers in 2008 over 2007.

### What Providers Are Delivering

The survey indicated that the greatest challenges facing providers in 2008 are marketing/customer acquisition and differentiation in a crowded market, with fewer hosts believing that differentiation in a crowded market (-3%) is an extreme challenge in 2008 over 2007.

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Today, most (88%) providers offer Shared Hosting, followed by Reseller (72%), Dedicated (53%), Rich Media (23%), VPS (33%), Co-location (21%), and Clustered (18%).

More hosting providers are offering advanced hosting platforms in 2008. The increases in hosts offering advanced hosting solutions in 2008 over 2007 include dedicated (9% increase), VPS (12% increase) and clustered (2% increase).

Fewer hosts are planning on adding traditional advanced hosting solutions in the next 12 months, with dedicated (-1%) and VPS (-2%) both seeing declines in 2008 over 2007. However, hosts are planning on adding other types of advanced hosting in the next 12 months, with co-location (3%), clustered (3%), and rich media hosting (3%) seeing increases in 2008 over 2007.

The survey found that most hosting companies offer the major categories of hosted applications including e-commerce (79%), blogging platforms (80%) and photo sharing/image galleries (77%). Voice over IP was the least-offered application at 11%, which is 3% less than in 2007, even though in 2007 18% of hosting providers said they planned on adding VoiP in the next 12 months.

There were significant increases in hosting providers that offer productivity applications (5%) and groupware applications (8%) in 2008 over 2007.

## **Observations and Opportunities**

The following observations and opportunities were identified from the results of the 2008 survey:

1. Advanced hosting platforms, including dedicated, VPS and co-location, are of increasing interest to consumers as they outgrow the limits of shared hosting. Hosting providers are responding by offering these advanced solutions as well as more specific types of advanced hosting, such as clustered and rich media.
2. Both hosting consumers and providers are concerned about the current economy. There is a rise in the amount of consumers who are cost-conscious when purchasing hosting. Providers are also concerned, as the cost of operations and acquiring financing becomes more difficult.
3. Consumers are becoming less concerned with uptime, privacy and data security. Providers are increasing the value of their hosting packages by adding a greater variety of hosted applications.

## Methodology

### Sample

The survey was administered to visitors of WebHostingTalk.com, an iNET Interactive community.

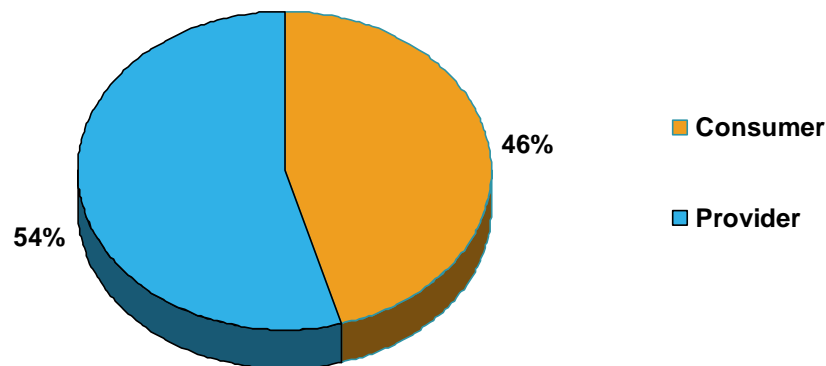
### Procedure

The survey was conducted between 5/22/08 – 7/07/08, via a link located in the promo bar of the WebHostingTalk.com home page. Announcements for the survey were placed in the Announcements forum of WHT and in the June and July WHT community newsletters.

### Response

A total of 390 people participated in the survey. The chart below shows the breakdown of those who identified themselves as providers or consumers of hosted services. Respondents were not permitted to choose both.

**Q: You would describe yourself primarily a \_\_\_\_\_ of hosting services.**



### Consumer Responses – Aggregate Results

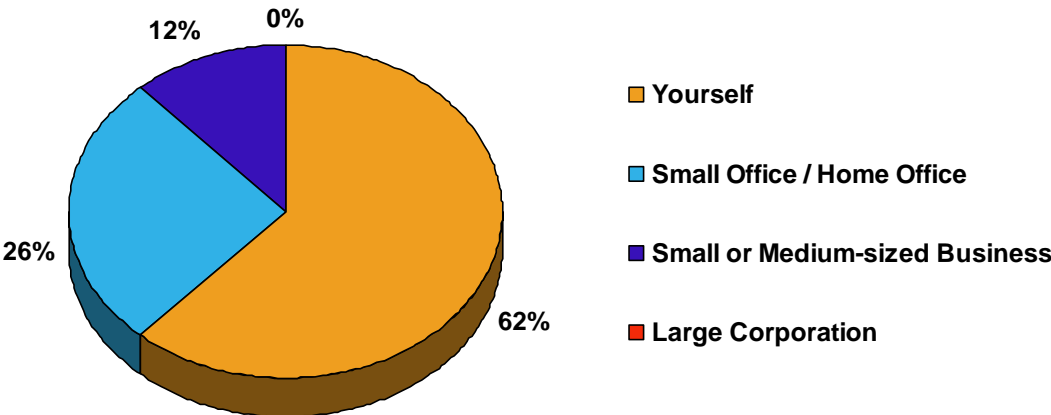
The following section contains the aggregate results of those who participated in the consumer portion of the survey. A total of **178** people responded to this particular section.

The survey aimed to break consumers of hosting into four distinct groups:

- Consumers who represent themselves
- Consumers who represent small / home offices
- Consumers who represent small / medium sized businesses
- Consumers who represent large corporations

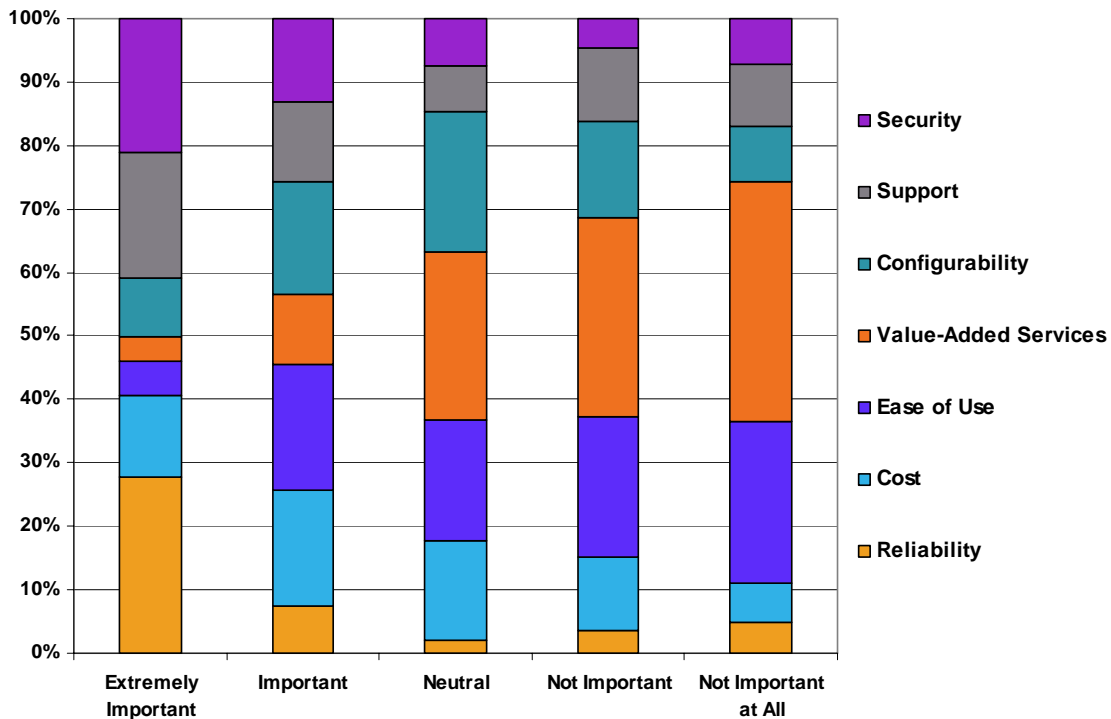
The last group, consumers who represent large corporations, did not receive any responses and is therefore excluded when breaking down the results by group.

Q: As a consumer of hosting services, you primarily represent \_\_\_\_\_.



Q: When choosing hosting services, how would you rank the following factors:

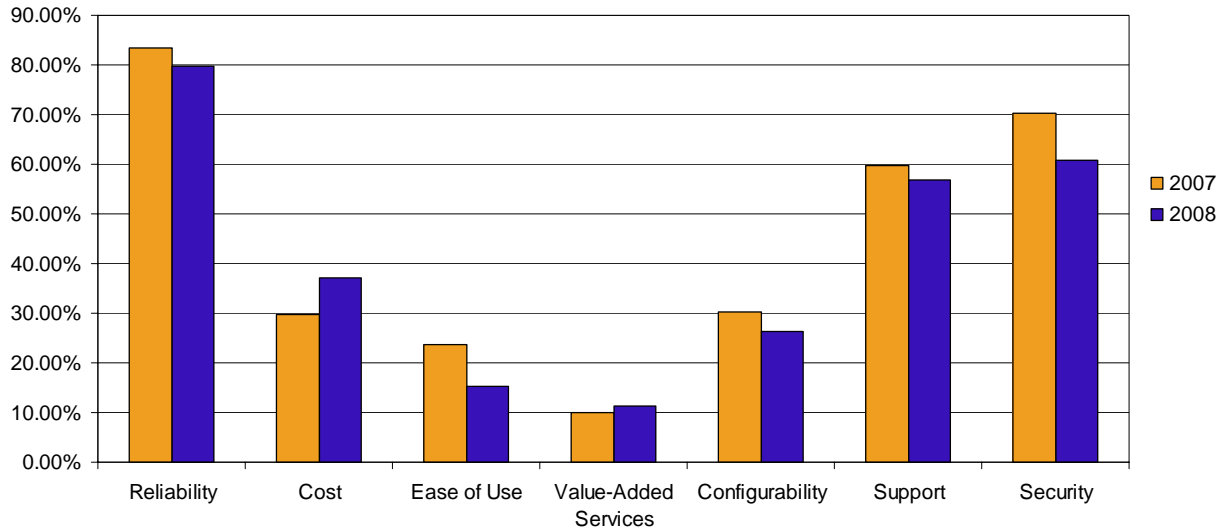
	Extremely Important	Important	Neutral	Not Important	Not Important at All
Reliability	79.78%	13.48%	2.81%	1.69%	2.25%
Cost	37.08%	33.15%	21.35%	5.62%	2.81%
Ease of Use	15.17%	35.96%	26.40%	10.67%	11.80%
Value-Added Services	11.24%	20.22%	35.96%	15.17%	17.42%
Configurability	26.40%	32.02%	30.34%	7.30%	3.93%
Support	56.74%	23.03%	10.11%	5.62%	4.49%
Security	60.67%	23.60%	10.11%	2.25%	3.37%



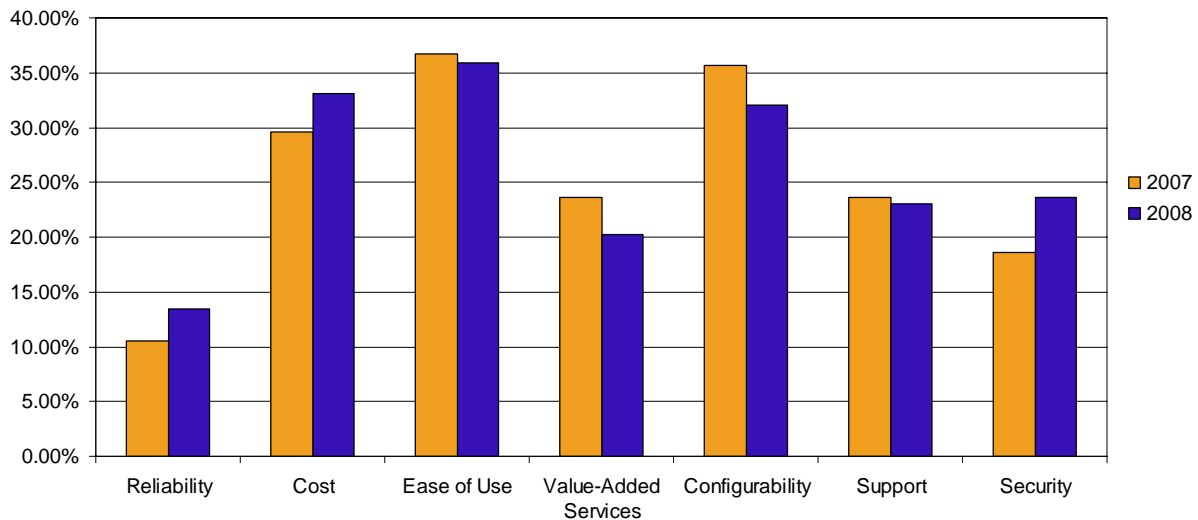
Q: When choosing hosting services, how would you rank the following factors:

Comparing 2007 and 2008:

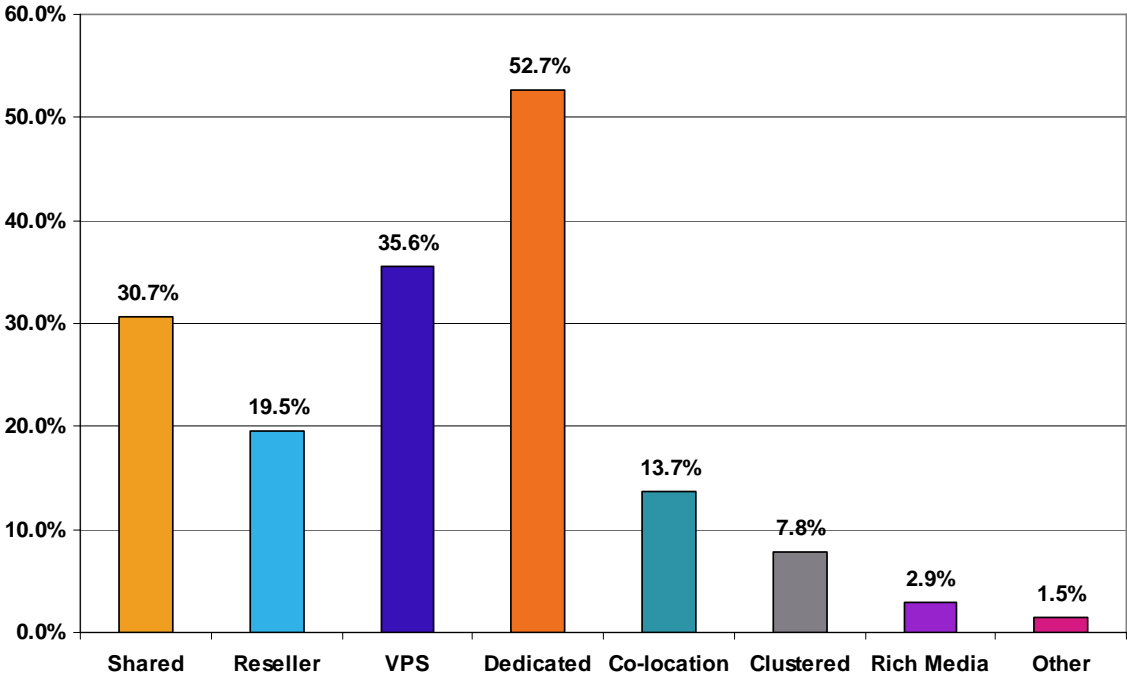
Ranked Extremely Important



Ranked Important

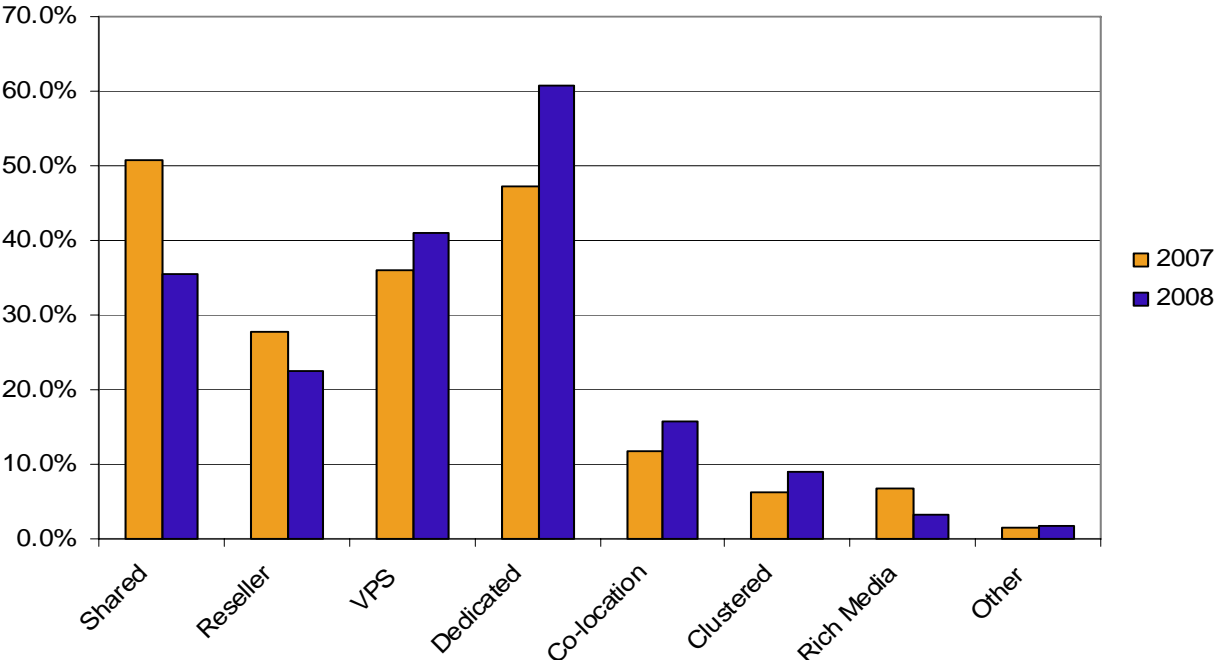


Q: What types of hosting do you plan to purchase in the next 12 months?



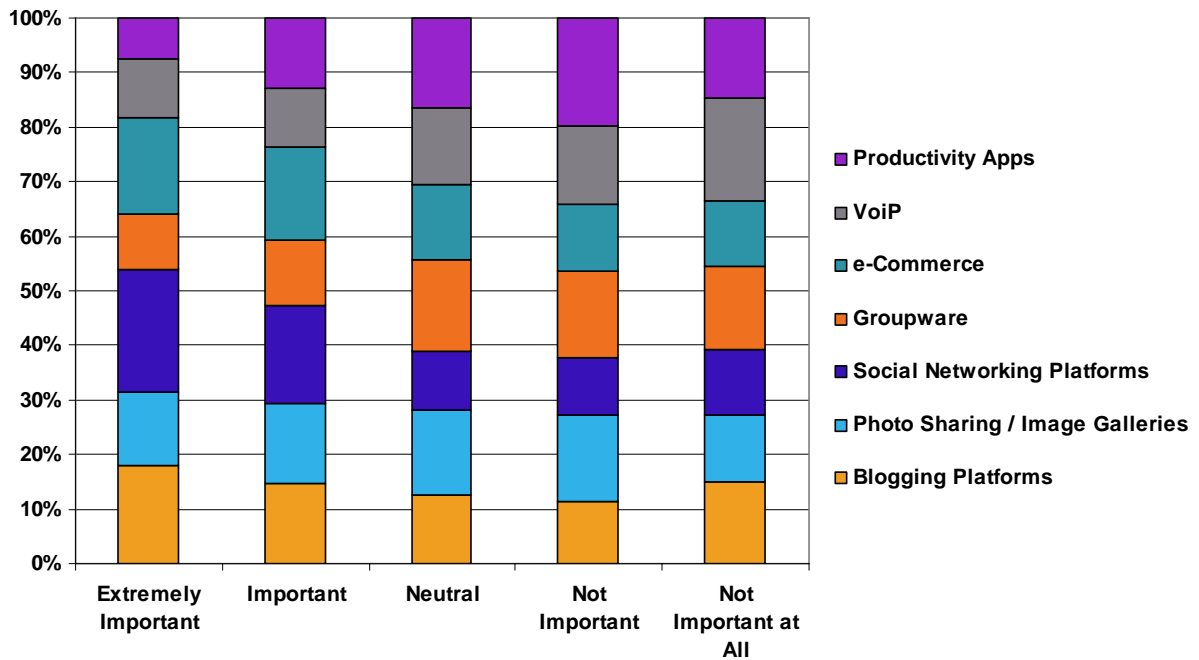
Q: What types of hosting do you plan to purchase in the next 12 months?

Comparing 2007 and 2008:



Q: How would you rank the value of the following hosted applications?

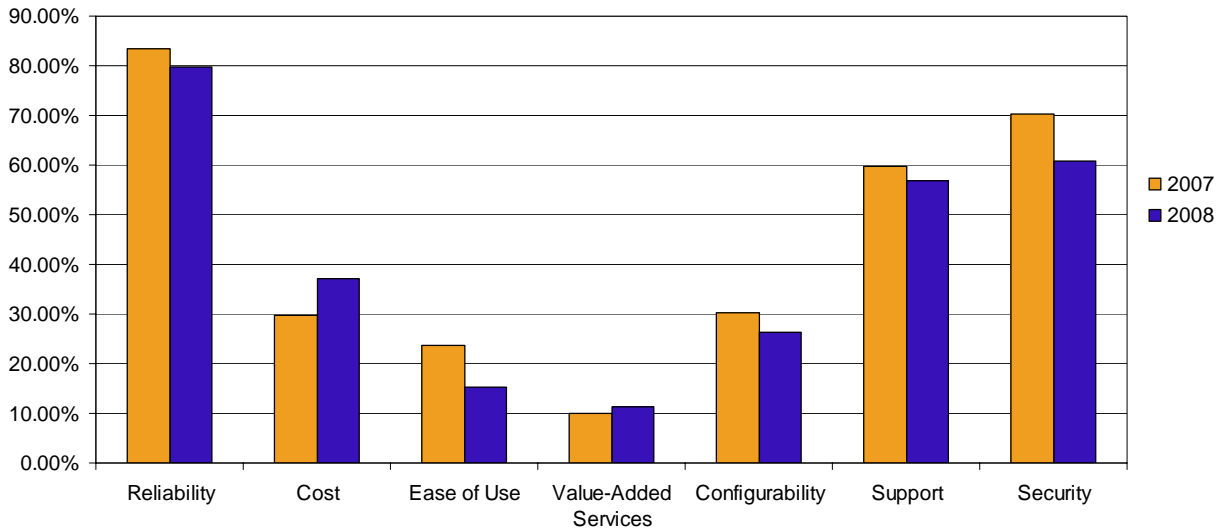
	Extremely Important	Important	Neutral	Not Important	Not Important at All
<b>Blogging Platforms</b>	22.5%	17.4%	19.1%	12.9%	28.1%
<b>Photo Sharing / Image Galleries</b>	16.9%	17.4%	24.2%	18.0%	23.6%
<b>Social Networking Platforms</b>	28.1%	21.3%	16.3%	11.8%	22.5%
<b>Groupware</b>	12.9%	14.0%	25.8%	18.0%	29.2%
<b>e-Commerce</b>	21.9%	20.2%	21.3%	14.0%	22.5%
<b>VoiP</b>	13.5%	12.9%	21.3%	16.3%	36.0%
<b>Productivity Apps</b>	9.6%	15.2%	25.3%	22.5%	27.5%



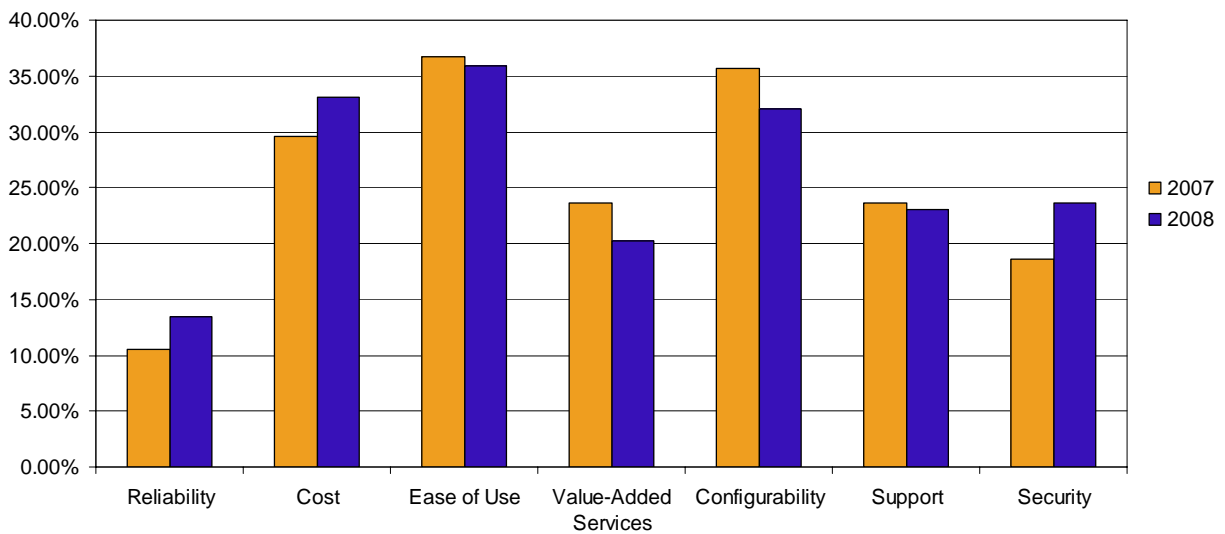
Q: How would you rank the value of the following hosted applications?

Comparing 2007 and 2008:

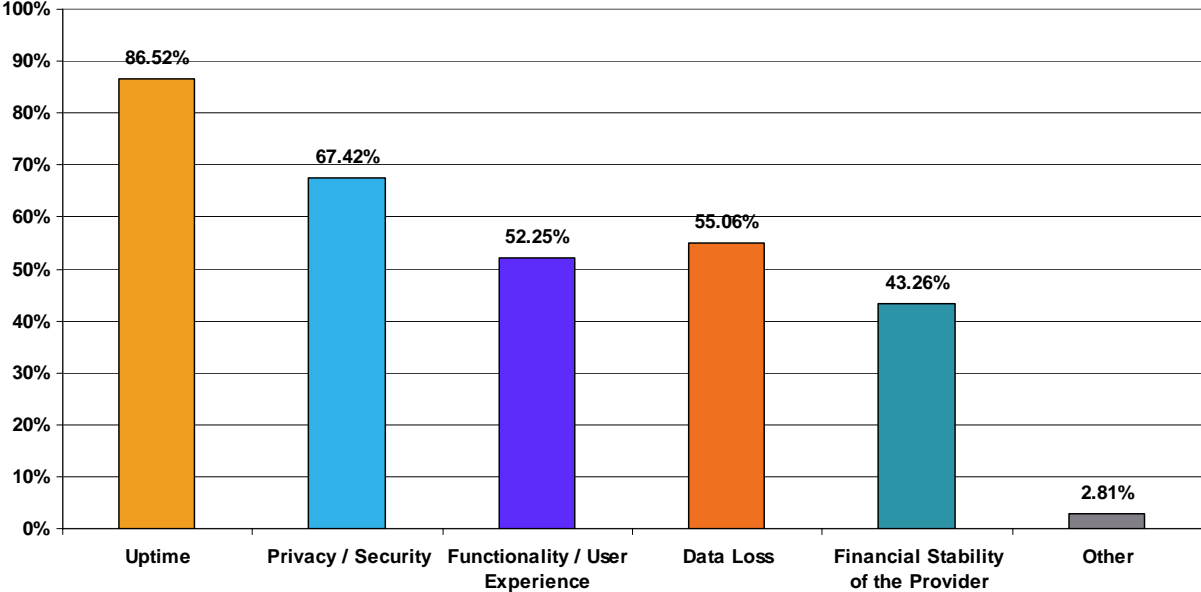
Ranked Extremely Important



Ranked Important

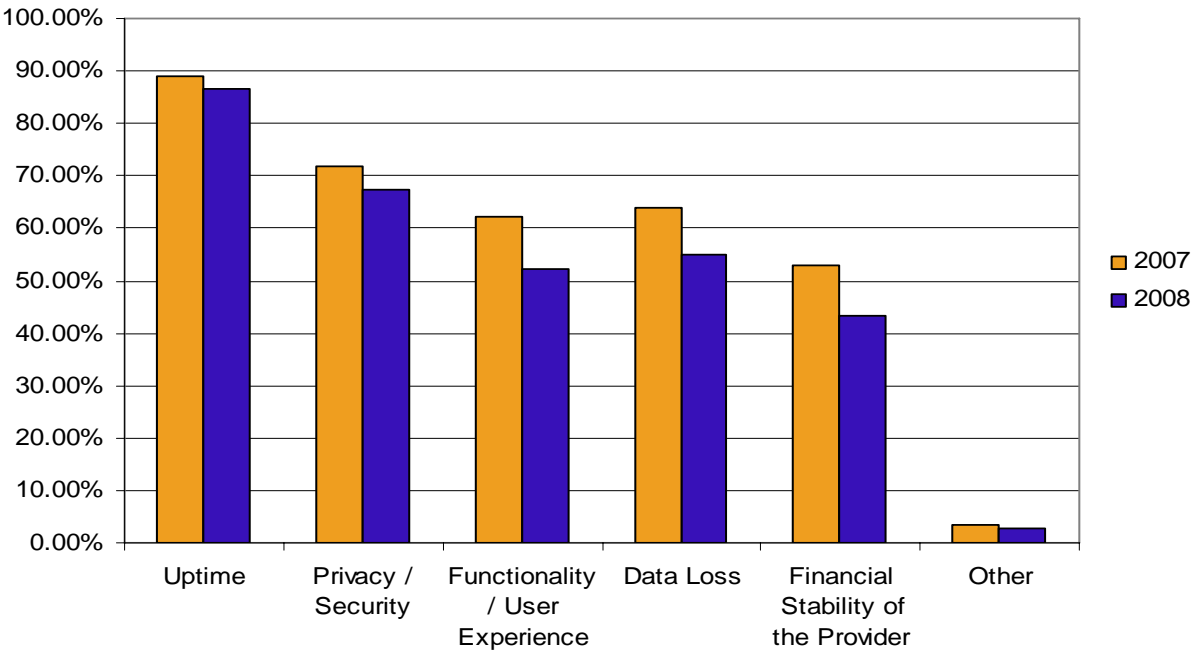


Q: As you consider hosted software applications, your biggest concerns are...



Q: As you consider hosted software applications, your biggest concerns are...

Comparing 2007 and 2008:



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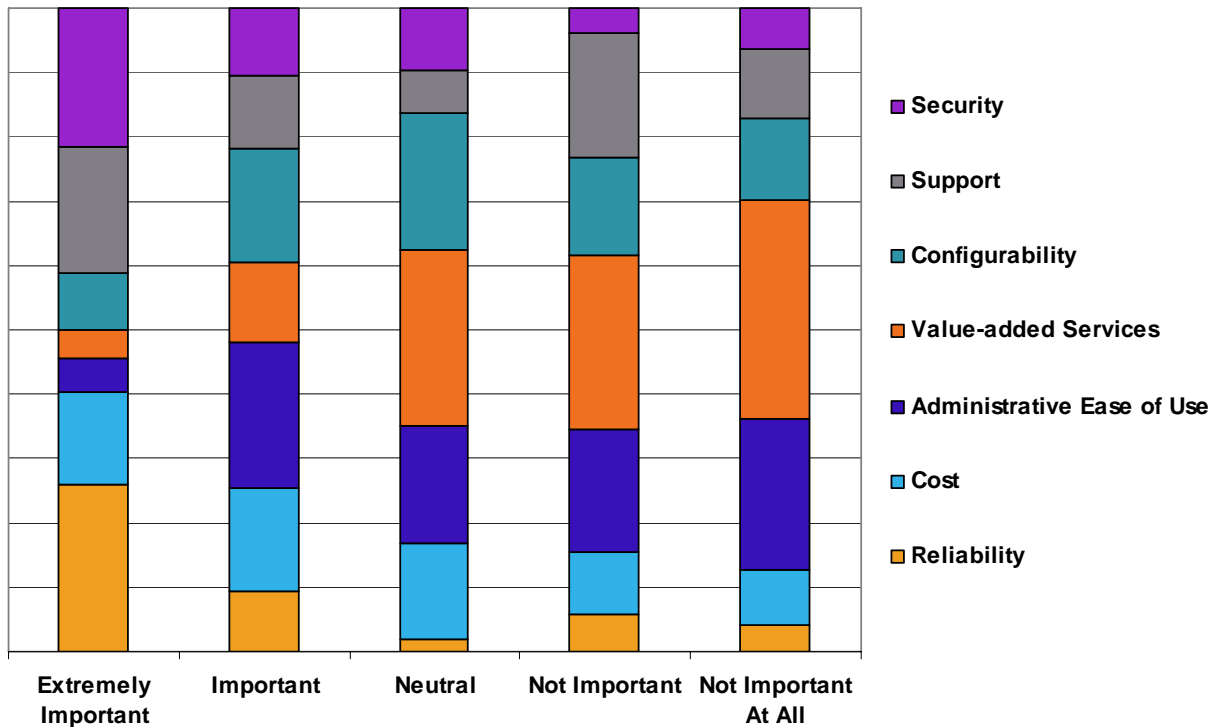
## **Consumer Responses – Representing Yourself**

The following section contains the results of those who participated in the consumer portion of the survey who indicated that they represented themselves as a consumer of hosting services.

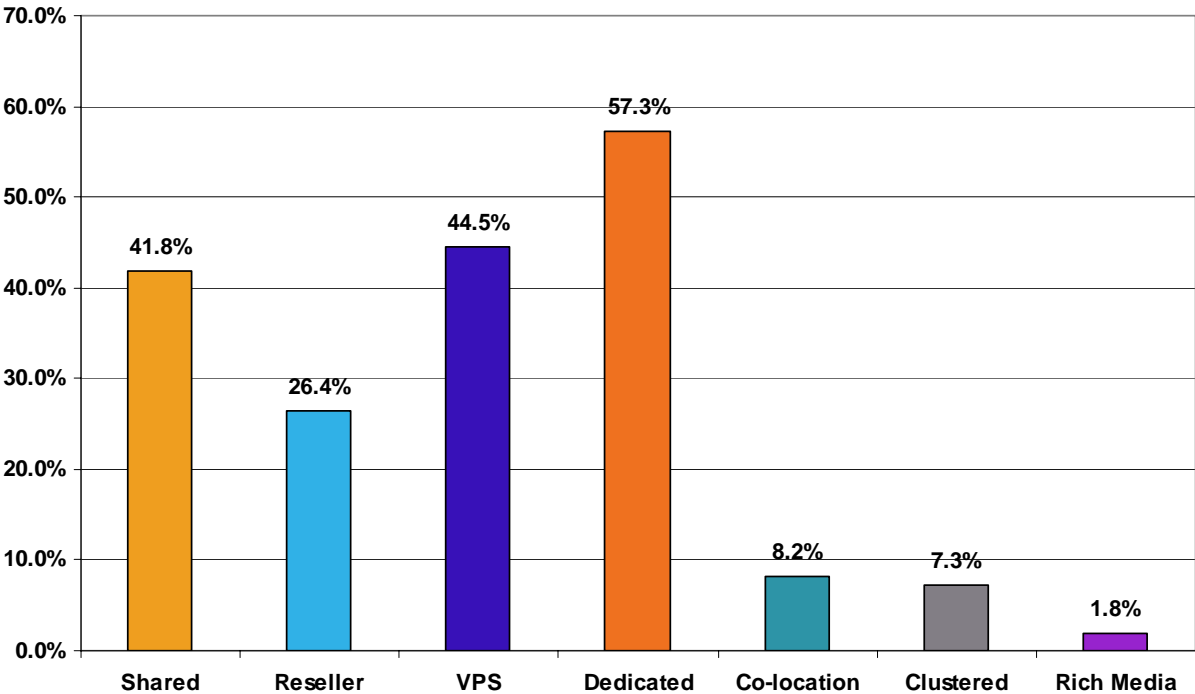
A total of **110** people are included in the responses to this section.

Q: When choosing hosting services, how would you rank the following factors:

	Extremely Important	Important	Neutral	Not Important	Not Important At All
Reliability	76.4%	16.4%	2.7%	2.7%	1.8%
Cost	42.7%	28.2%	20.9%	4.5%	3.6%
Administrative Ease of Use	15.5%	40.0%	25.5%	9.1%	10.0%
Value-added Services	12.7%	21.8%	38.2%	12.7%	14.5%
Configurability	26.4%	30.9%	30.0%	7.3%	5.5%
Support	57.3%	20.0%	9.1%	9.1%	4.5%
Security	63.6%	18.2%	13.6%	1.8%	2.7%

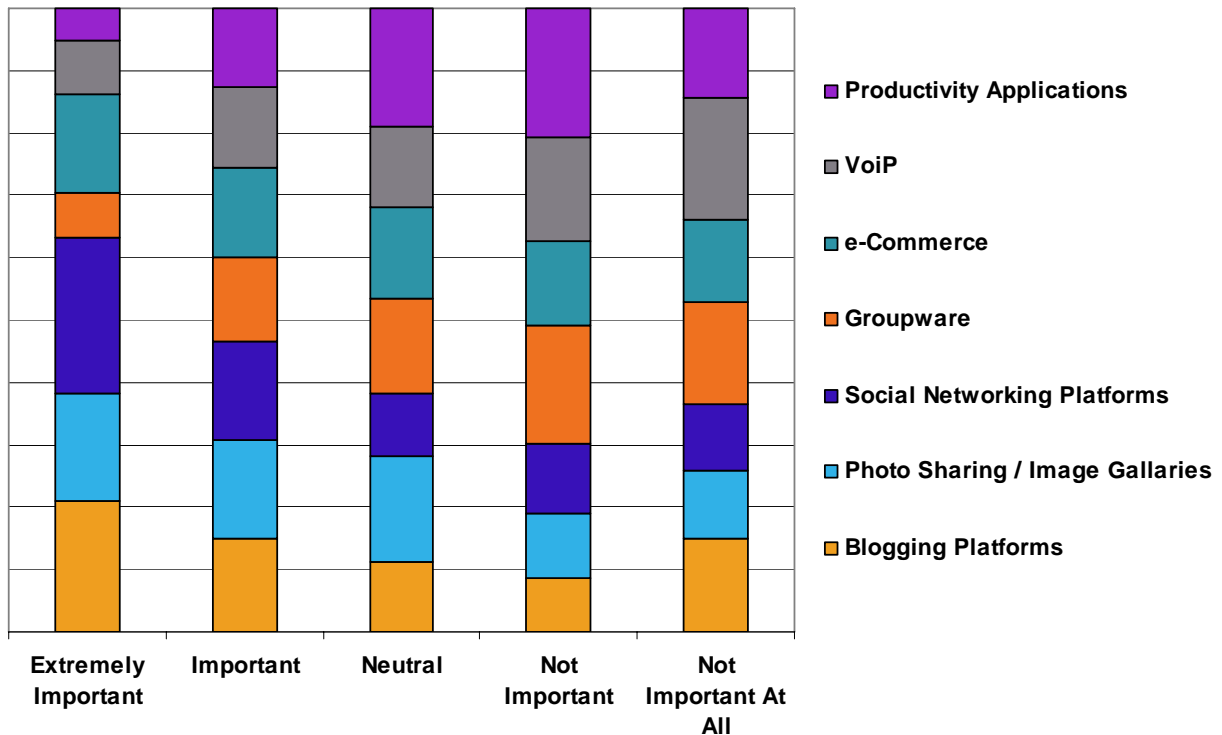


Q: What types of hosting do you plan to purchase in the next 12 months?

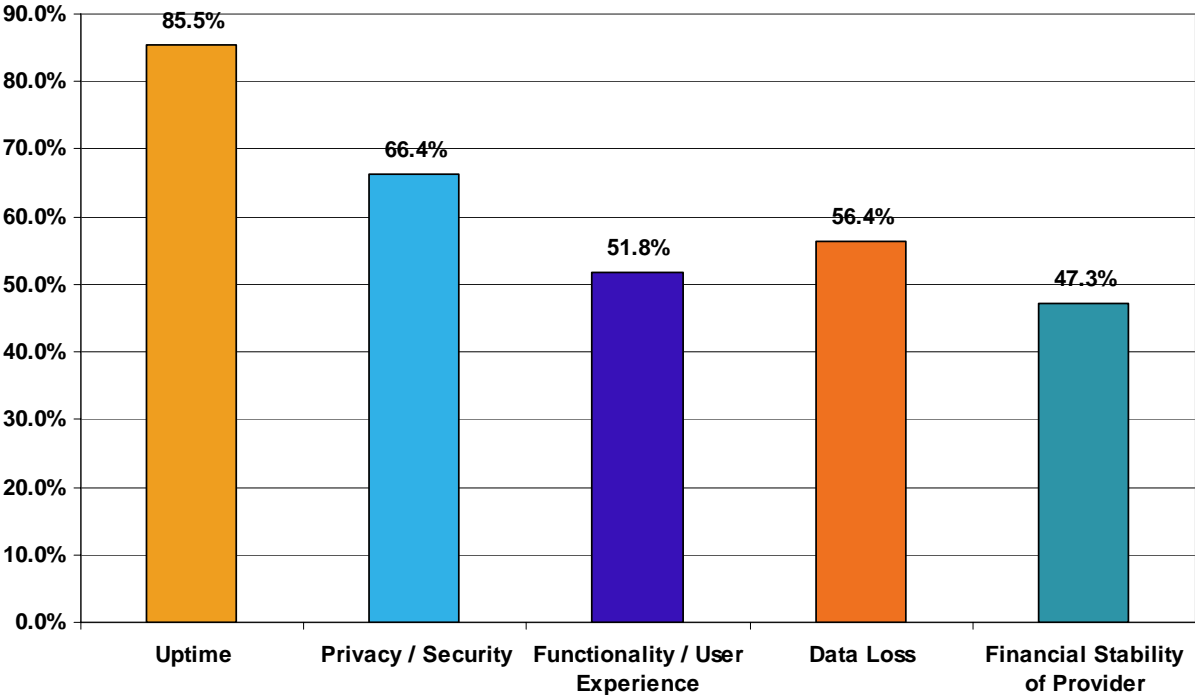


Q: How would you rank the value of the following hosted applications?

	Extremely Important	Important	Neutral	Not Important	Not Important At All
<b>Blogging Platforms</b>	29.1%	18.2%	17.3%	10.0%	25.5%
<b>Photo Sharing / Image Galleries</b>	23.6%	19.1%	26.4%	11.8%	19.1%
<b>Social Networking Platforms</b>	34.5%	19.1%	15.5%	12.7%	18.2%
<b>Groupware</b>	10.0%	16.4%	23.6%	21.8%	28.2%
<b>e-Commerce</b>	21.8%	17.3%	22.7%	15.5%	22.7%
<b>VoiP</b>	11.8%	15.5%	20.0%	19.1%	33.6%
<b>Productivity Applications</b>	7.3%	15.5%	29.1%	23.6%	24.5%



Q: As you consider hosted software applications, your biggest concerns are...



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## **Consumer Responses – Small Office / Home Office**

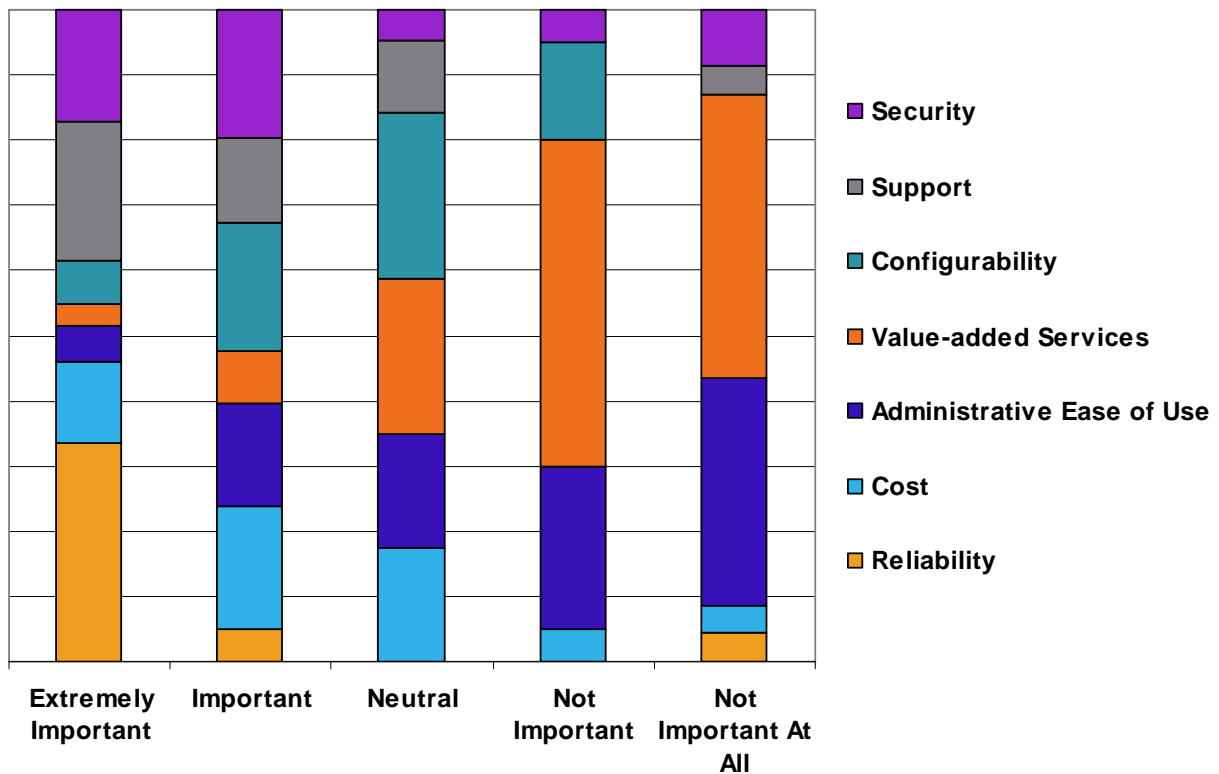
The following section contains the results of those who participated in the consumer portion of the survey who indicated that they represented a small office / home office as a consumer of hosting services.

In the survey, small office / home office was defined as having between 1 and 5 employees.

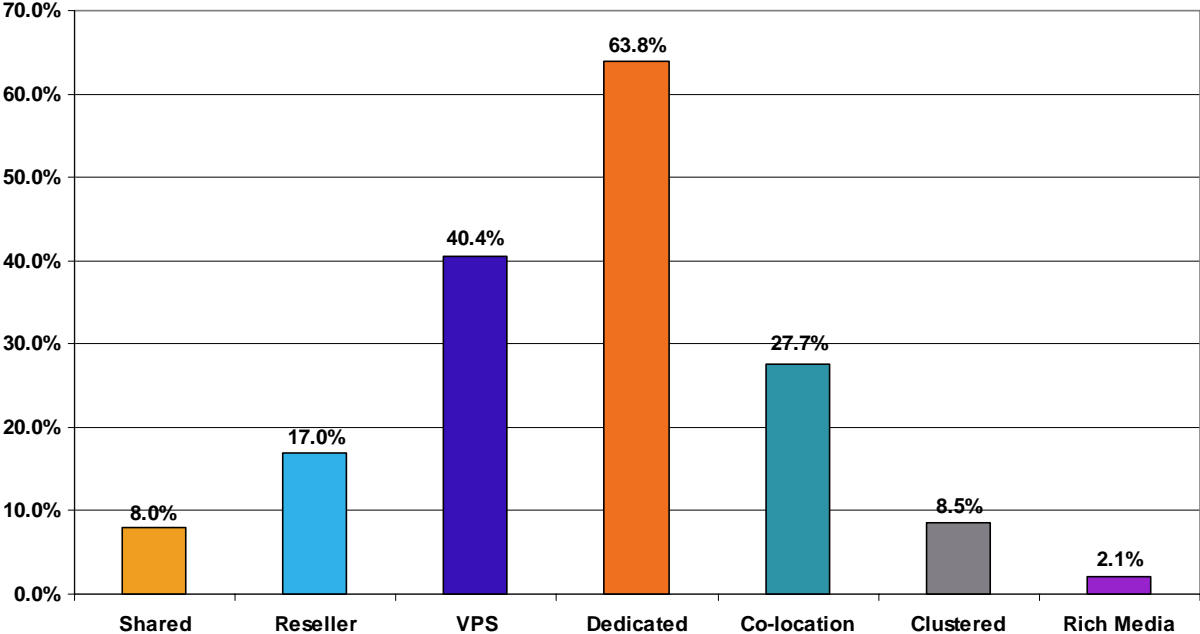
A total of **47** people are included in the responses to this section.

Q: When choosing hosting services, how would you rank the following factors:

	Extremely Important	Important	Neutral	Not Important	Not Important At All
Reliability	87.2%	10.6%	0.0%	0.0%	2.1%
Cost	31.9%	40.4%	23.4%	2.1%	2.1%
Administrative Ease of Use	14.9%	34.0%	23.4%	10.6%	17.0%
Value-added Services	8.5%	17.0%	31.9%	21.3%	21.3%
Configurability	17.0%	42.6%	34.0%	6.4%	0.0%
Support	55.3%	27.7%	14.9%	0.0%	2.1%
Security	44.7%	42.6%	6.4%	2.1%	4.3%

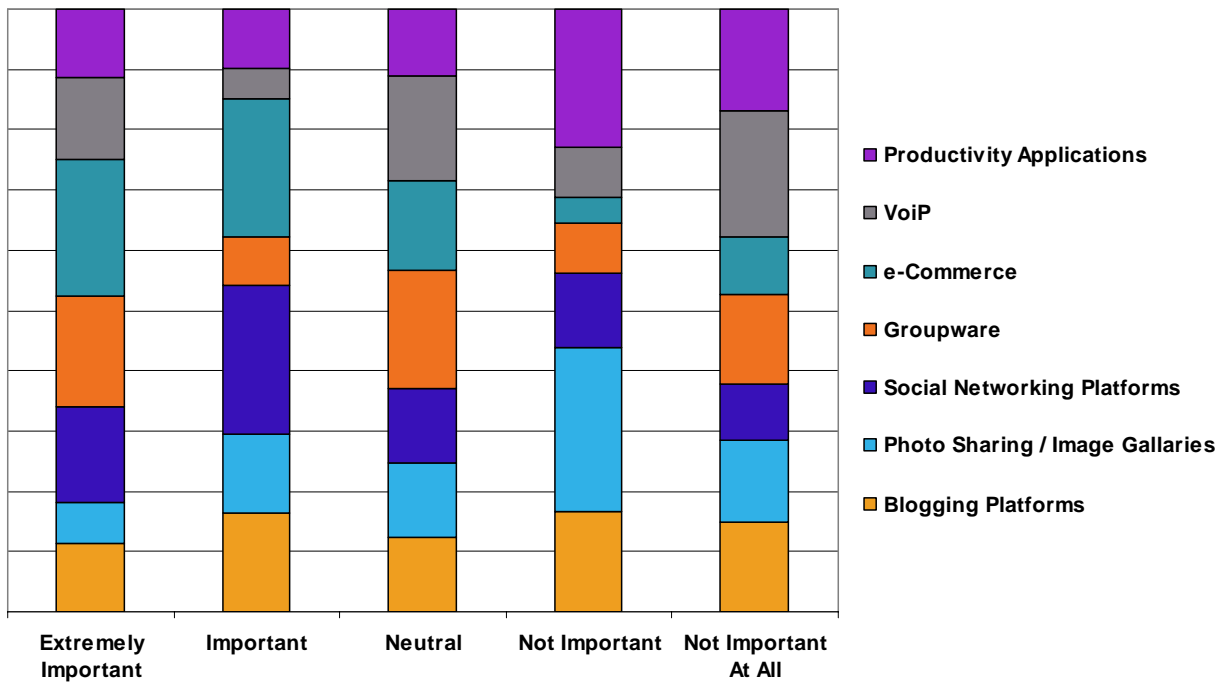


Q: What types of hosting do you plan to purchase in the next 12 months?

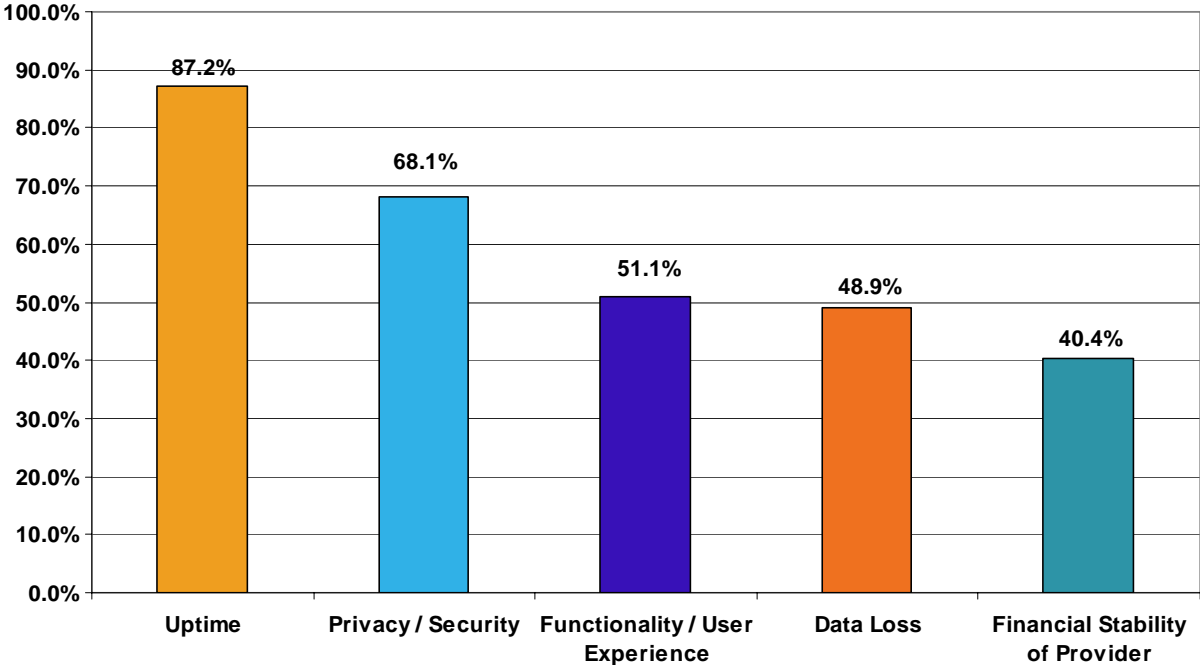


Q: How would you rank the value of the following hosted applications?

	Extremely Important	Important	Neutral	Not Important	Not Important At All
<b>Blogging Platforms</b>	10.6%	21.3%	21.3%	17.0%	29.8%
<b>Photo Sharing / Image Galleries</b>	6.4%	17.0%	21.3%	27.7%	27.7%
<b>Social Networking Platforms</b>	14.9%	31.9%	21.3%	12.8%	19.1%
<b>Groupware</b>	17.0%	10.6%	34.0%	8.5%	29.8%
<b>e-Commerce</b>	21.3%	29.8%	25.5%	4.3%	19.1%
<b>VoiP</b>	12.8%	6.4%	29.8%	8.5%	42.6%
<b>Productivity Applications</b>	10.6%	12.8%	19.1%	23.4%	34.0%



Q: As you consider hosted software applications, your biggest concerns are...



## **Consumer Responses – Small / Medium Sized Business**

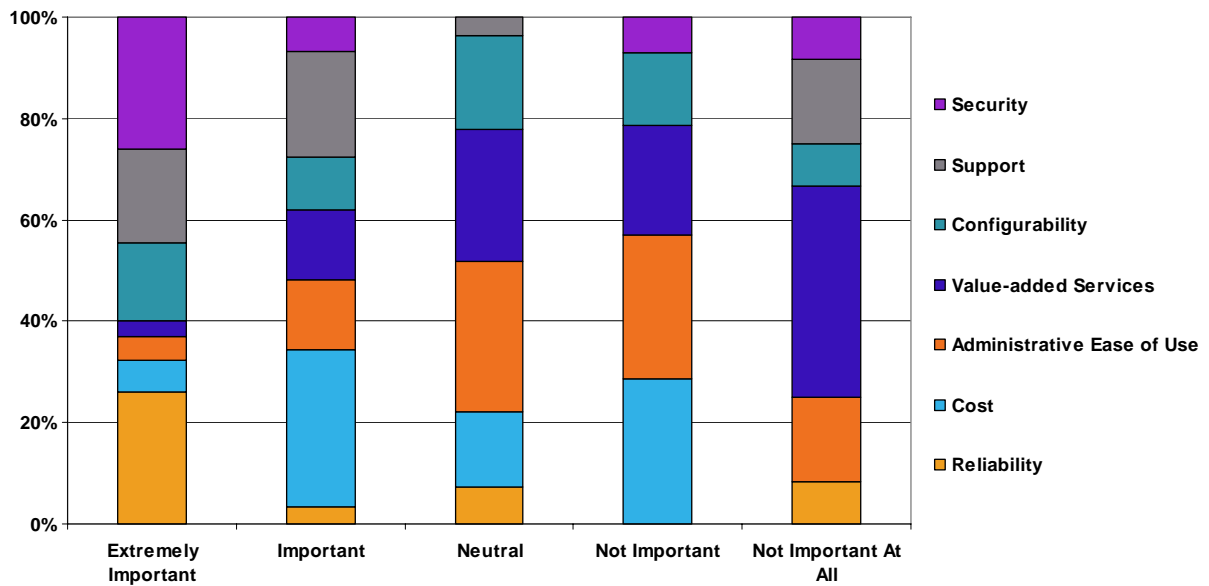
The following section contains the results of those who participated in the consumer portion of the survey who indicated that they represent a small / medium sized business as a consumer of hosting services.

In the survey, a small / medium sized business was defined as having between 6 and 1,000 employees.

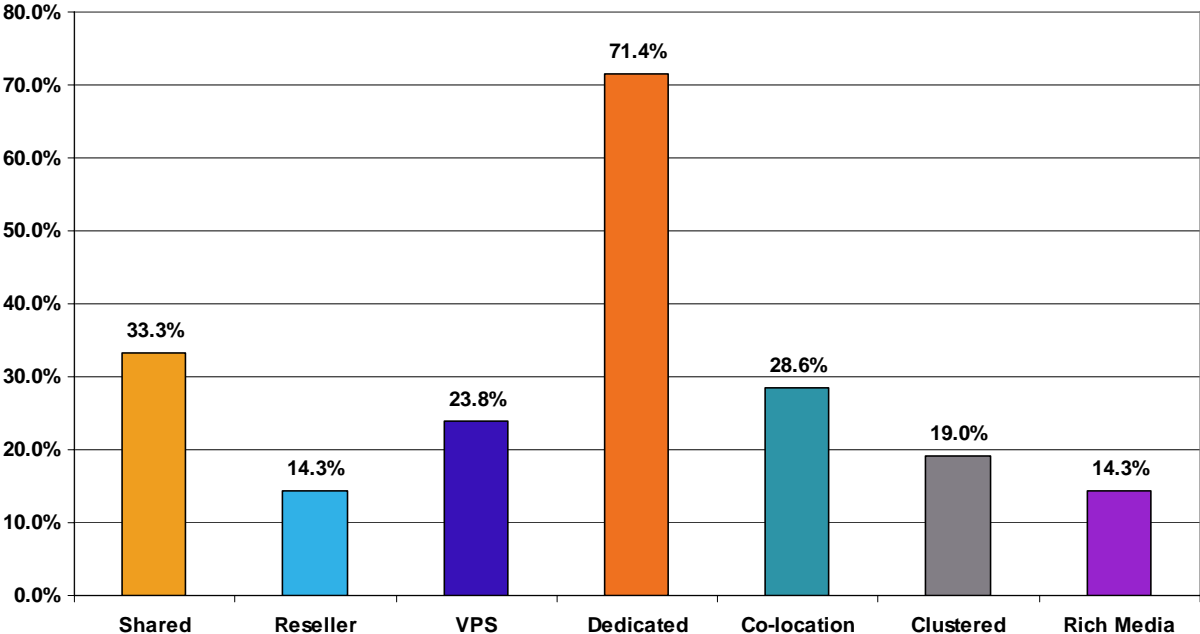
A total of **21** people are included in the responses to this section.

Q: When choosing hosting services, how would you rank the following factors:

	Extremely Important	Important	Neutral	Not Important	Not Important At All
Reliability	81.0%	4.8%	9.5%	0.0%	4.8%
Cost	19.0%	42.9%	19.0%	19.0%	0.0%
Administrative Ease of Use	14.3%	19.0%	38.1%	19.0%	9.5%
Value-added Services	9.5%	19.0%	33.3%	14.3%	23.8%
Configurability	47.6%	14.3%	23.8%	9.5%	4.8%
Support	57.1%	28.6%	4.8%	0.0%	9.5%
Security	81.0%	9.5%	0.0%	4.8%	4.8%

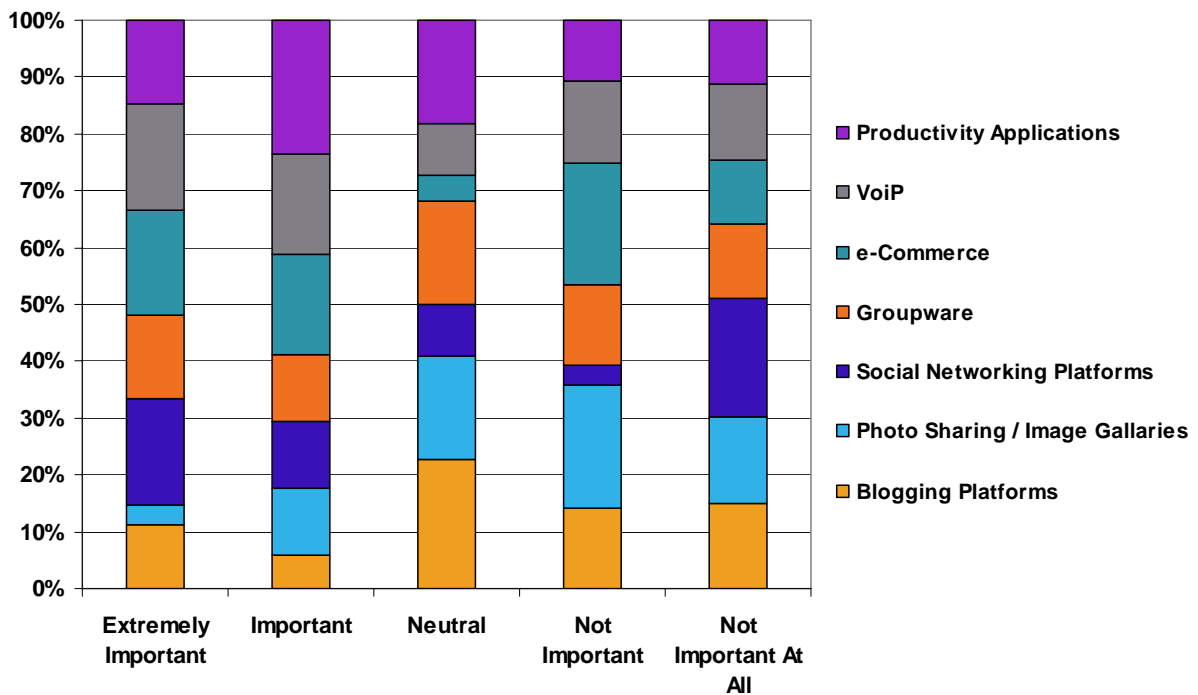


Q: What types of hosting do you plan to purchase in the next 12 months?

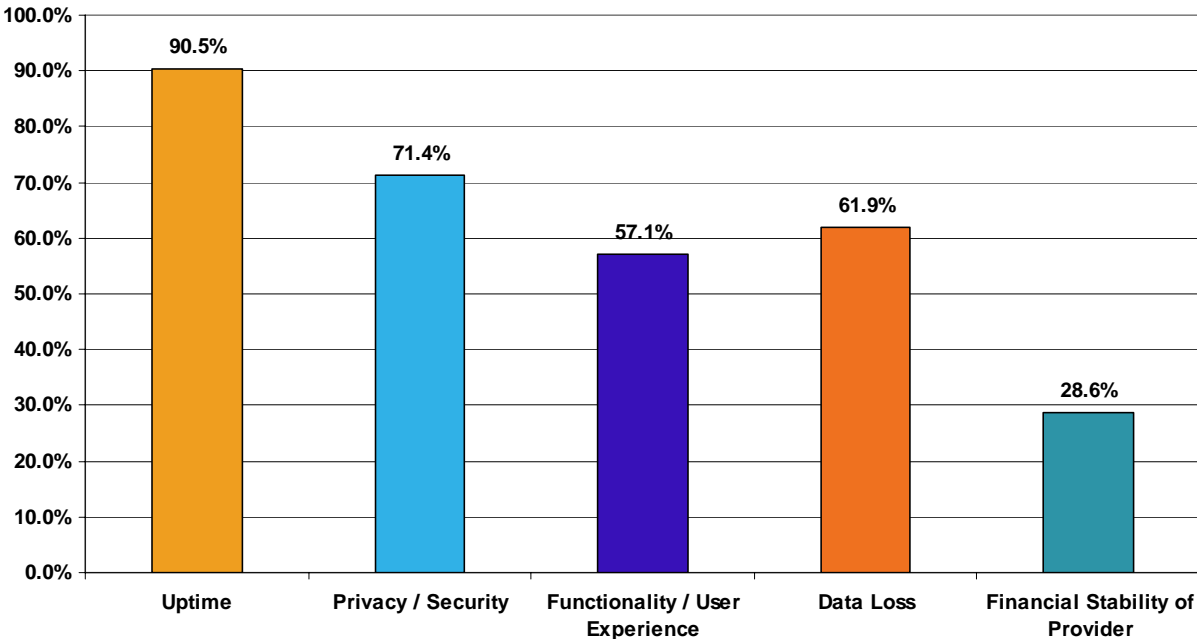


Q: How would you rank the value of the following hosted applications?

	Extremely Important	Important	Neutral	Not Important	Not Important At All
<b>Blogging Platforms</b>	14.3%	4.8%	23.8%	19.0%	38.1%
<b>Photo Sharing / Image Galleries</b>	4.8%	9.5%	19.0%	28.6%	38.1%
<b>Social Networking Platforms</b>	23.8%	9.5%	9.5%	4.8%	52.4%
<b>Groupware</b>	19.0%	9.5%	19.0%	19.0%	33.3%
<b>e-Commerce</b>	23.8%	14.3%	4.8%	28.6%	28.6%
<b>VoiP</b>	23.8%	14.3%	9.5%	19.0%	33.3%
<b>Productivity Applications</b>	19.0%	19.0%	19.0%	14.3%	28.6%



Q: As you consider hosted software applications, your biggest concerns are...



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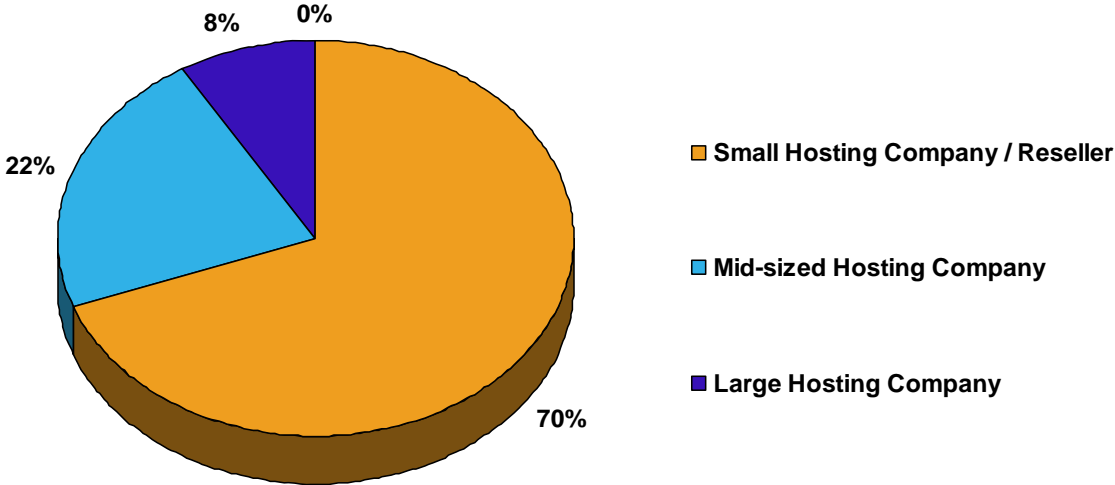
## **Provider Responses– Aggregate Results**

The following section contains the aggregate results of those who participated in the hosting provider portion of the survey. A total of **212** people responded to this section.

The survey aimed to break providers of hosting into three distinct groups:

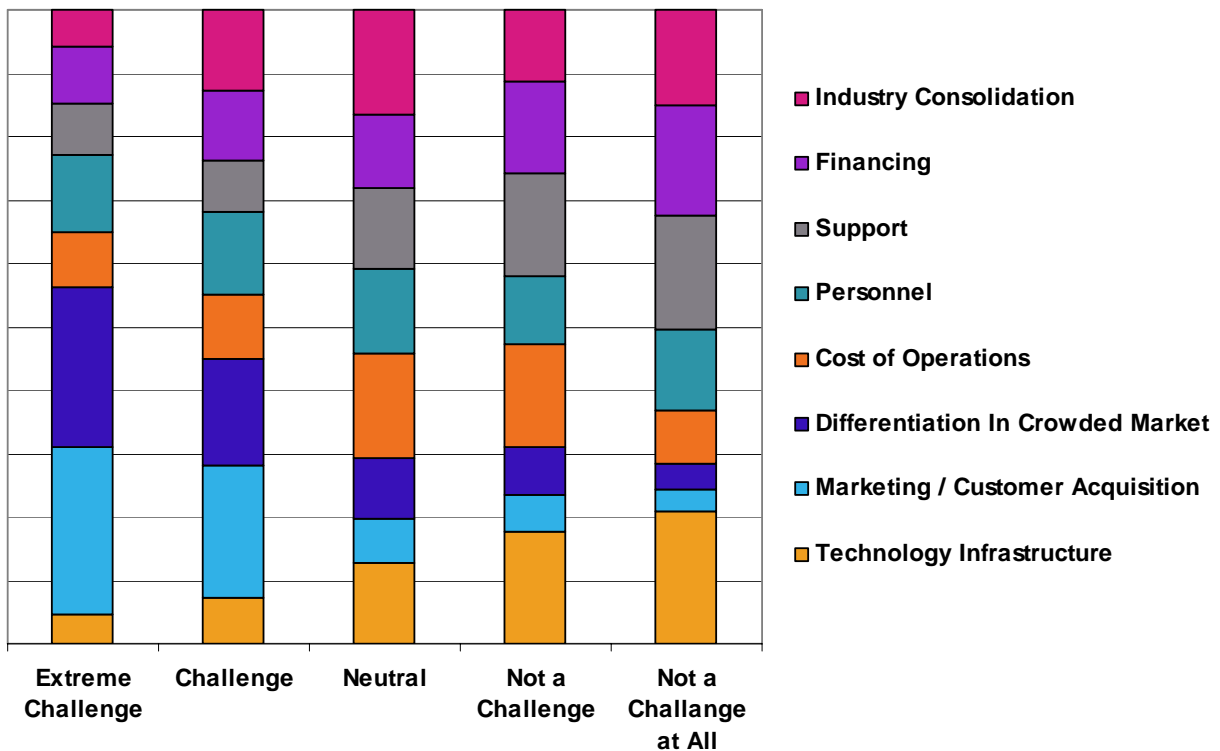
- Small hosting companies / resellers
- Mid-sized hosting companies
- Large hosting companies

Q: As a hosting provider, how would you describe yourself?



Q: As a hosting company, what are your greatest challenges?

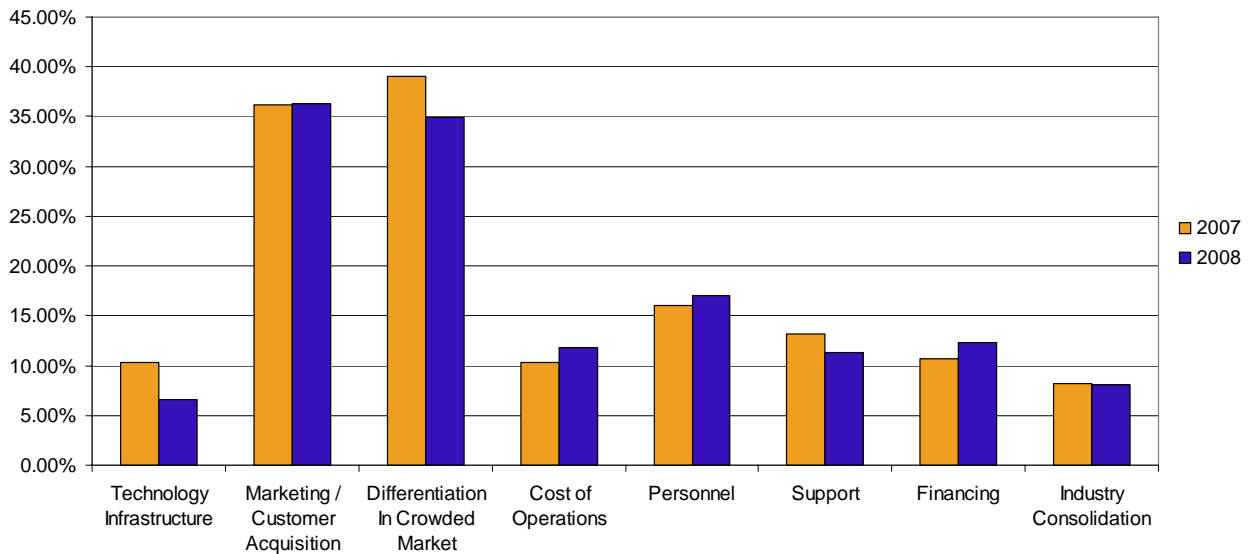
	Extreme Challenge	Challenge	Neutral	Not a Challenge	Not a Challenge at All
Technology Infrastructure	6.60%	12.26%	24.53%	32.08%	24.53%
Marketing / Customer Acquisition	36.32%	34.91%	13.68%	10.85%	4.25%
Differentiation In Crowded Market	34.91%	27.83%	18.87%	13.68%	4.72%
Cost of Operations	11.79%	16.98%	32.08%	29.25%	9.91%
Personnel	16.98%	22.17%	25.94%	19.81%	15.09%
Support	11.32%	13.68%	24.53%	29.25%	21.23%
Financing	12.26%	18.40%	22.64%	26.42%	20.28%
Industry Consolidation	8.02%	21.23%	32.08%	20.75%	17.92%



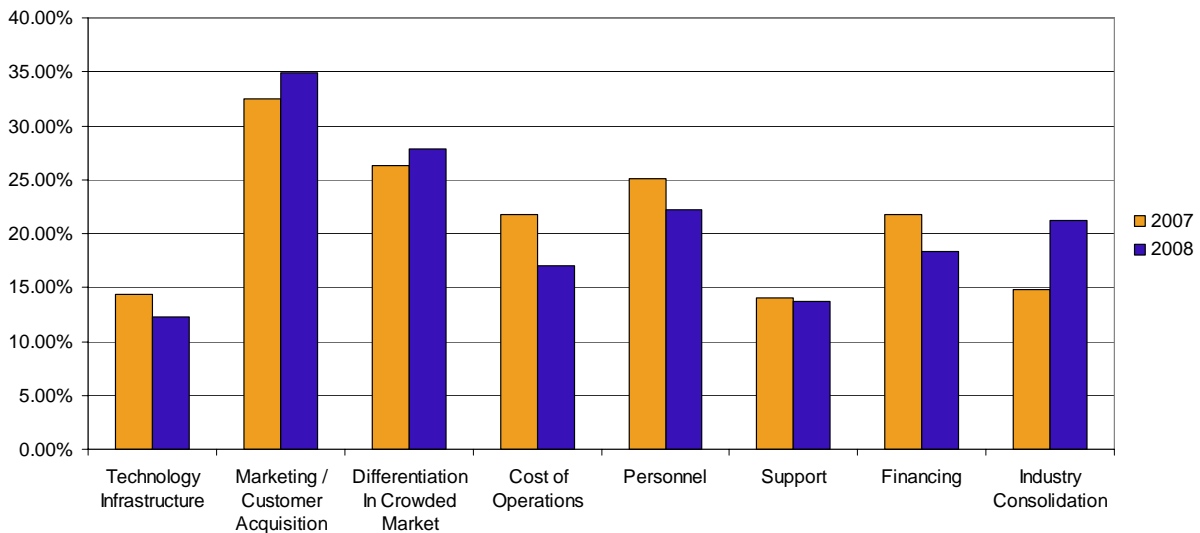
Q: As a hosting company, what are your greatest challenges?

Comparing 2007 and 2008:

Ranked an Extreme Challenge

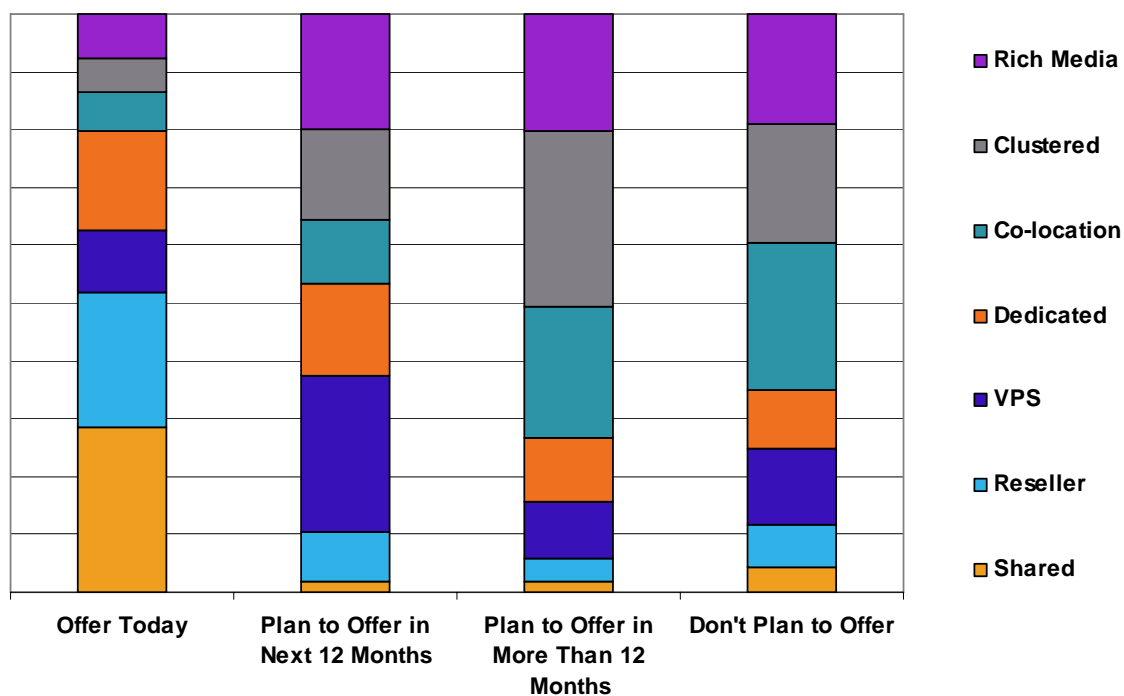


Ranked a Challenge



Q: What types of hosting do you offer or plan to offer?

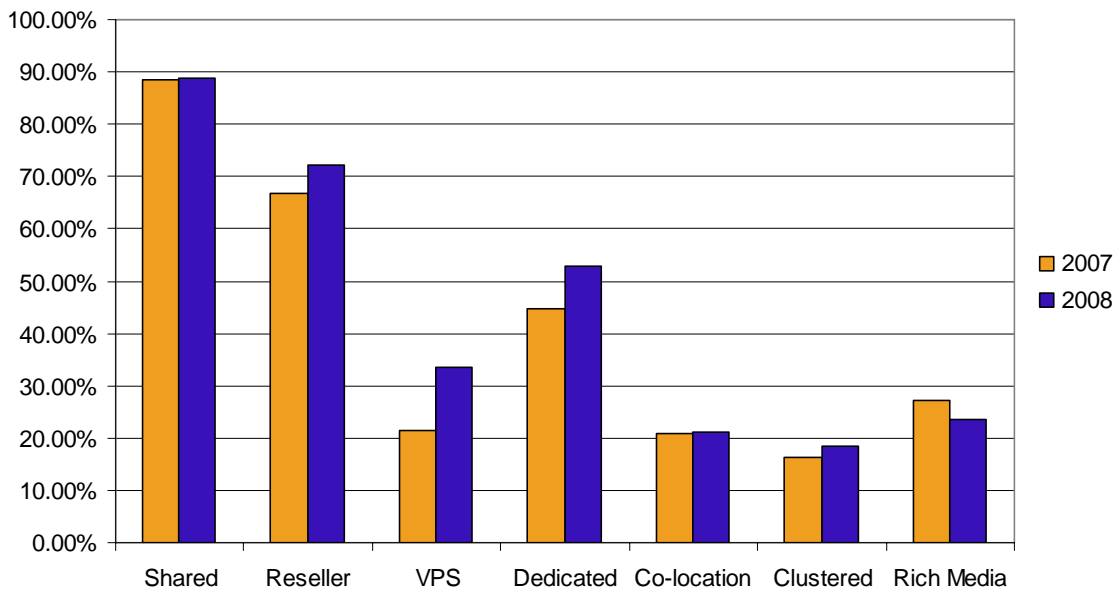
	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Shared	88.68%	2.36%	1.42%	7.55%
Reseller	72.17%	10.85%	3.30%	13.68%
VPS	33.49%	34.43%	8.02%	24.06%
Dedicated	52.83%	20.28%	8.96%	17.92%
Co-location	21.23%	14.15%	18.40%	46.23%
Clustered	18.40%	19.81%	24.53%	37.26%
Rich Media	23.58%	25.47%	16.51%	34.43%



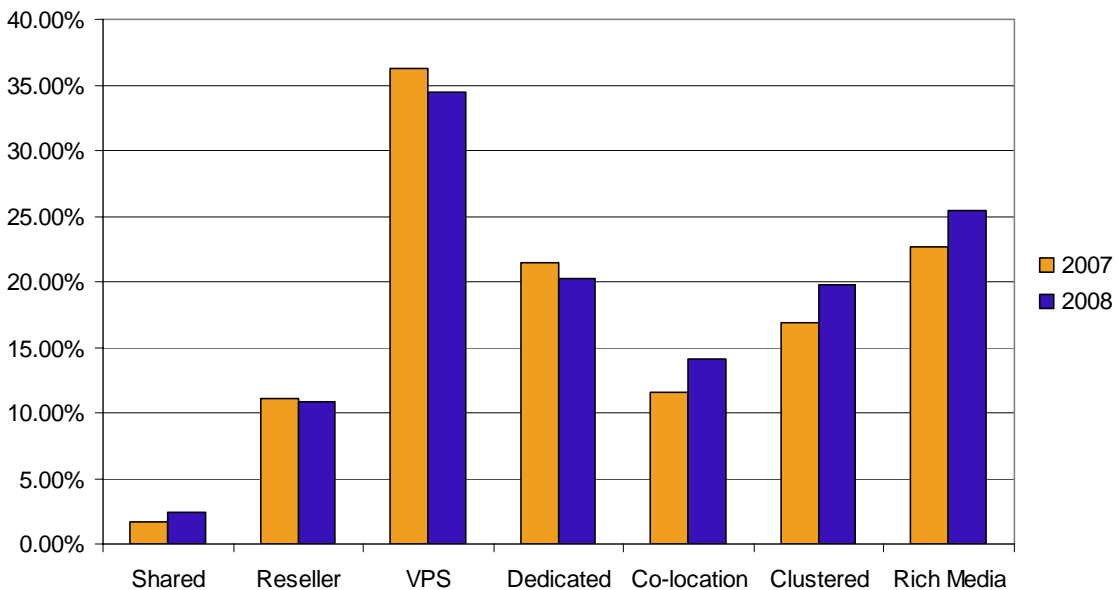
Q: What types of hosting do you offer or plan to offer?

Comparing 2007 and 2008:

Offer Today

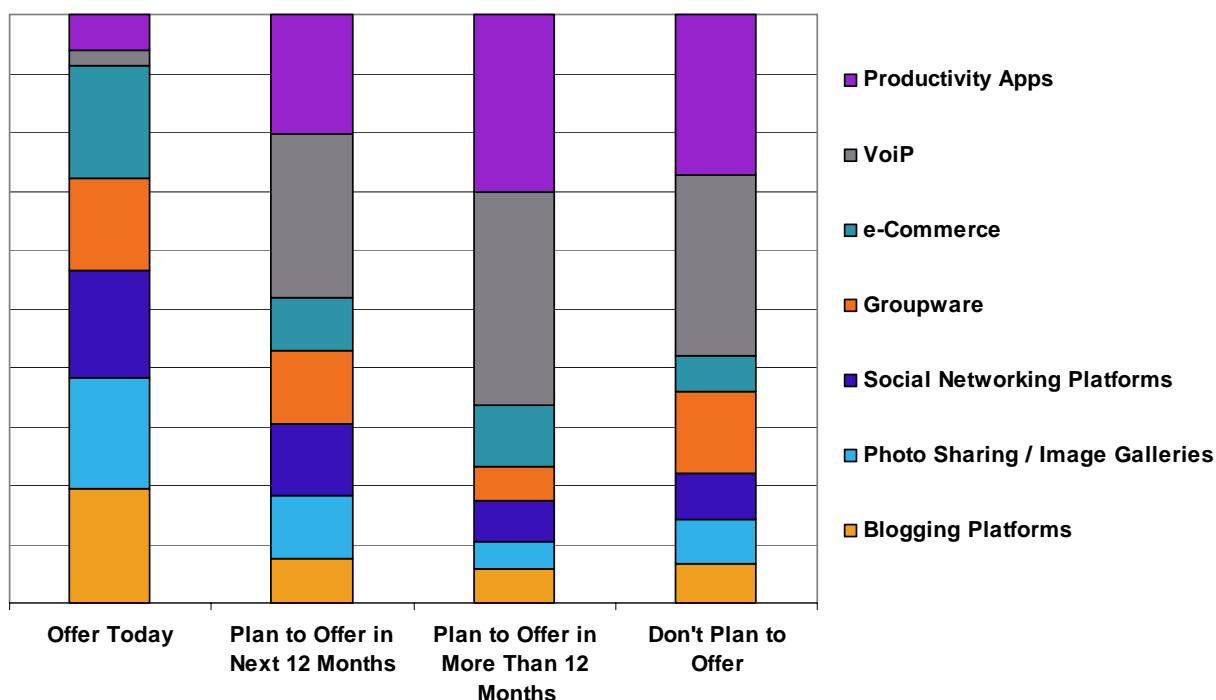


Plan to Offer in Next 12 Months



Q: What hosted applications do you offer or plan to offer?

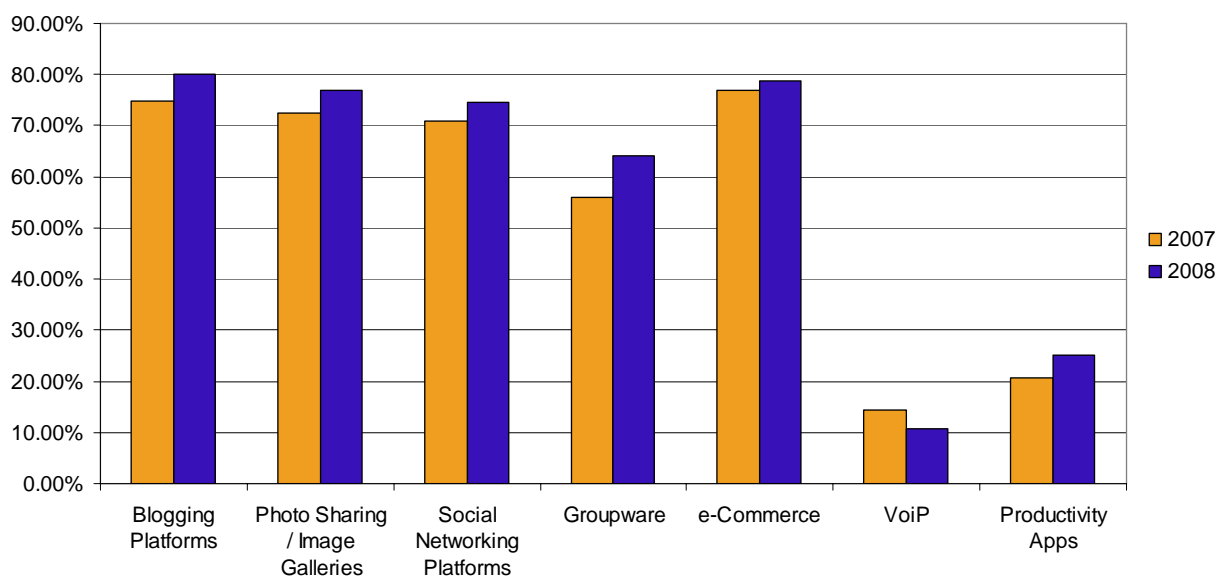
	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
<b>Blogging Platforms</b>	80.19%	5.66%	2.36%	11.79%
<b>Photo Sharing / Image Galleries</b>	76.89%	8.02%	1.89%	13.21%
<b>Social Networking Platforms</b>	74.53%	8.96%	2.83%	13.68%
<b>Groupware</b>	64.15%	9.43%	2.36%	24.06%
<b>e-Commerce</b>	78.77%	6.60%	4.25%	10.38%
<b>VoiP</b>	10.85%	20.75%	14.62%	53.77%
<b>Productivity Apps</b>	25.00%	15.09%	12.26%	47.64%



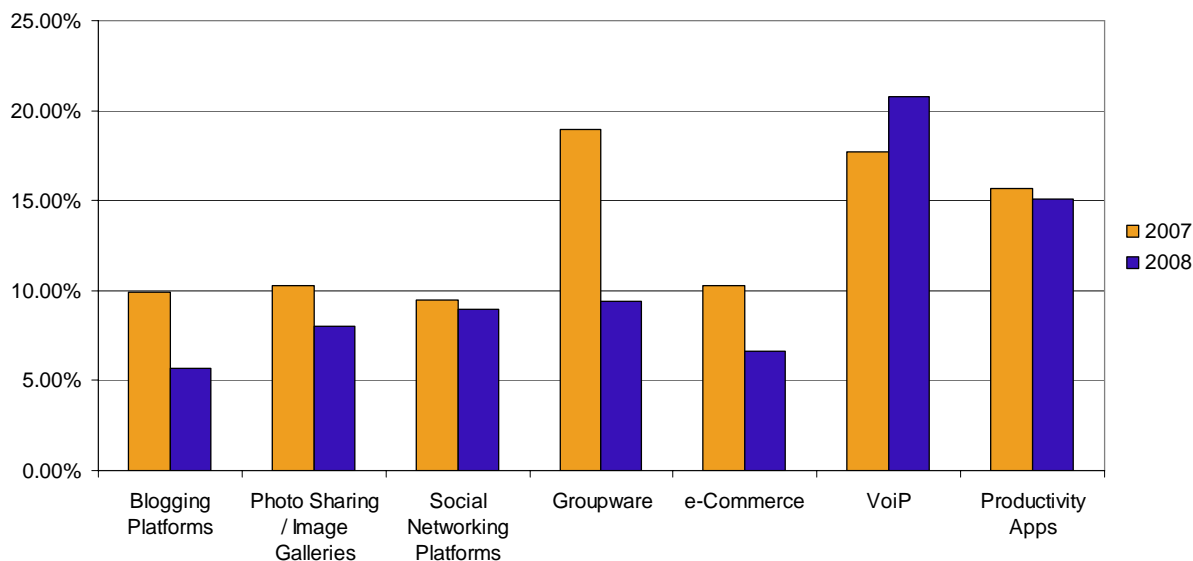
Q: What hosted applications do you offer or plan to offer?

Comparing 2007 and 2008:

Offer Today



Plan to Offer in Next 12 Months



## **Provider Responses – Small Hosting Company / Reseller**

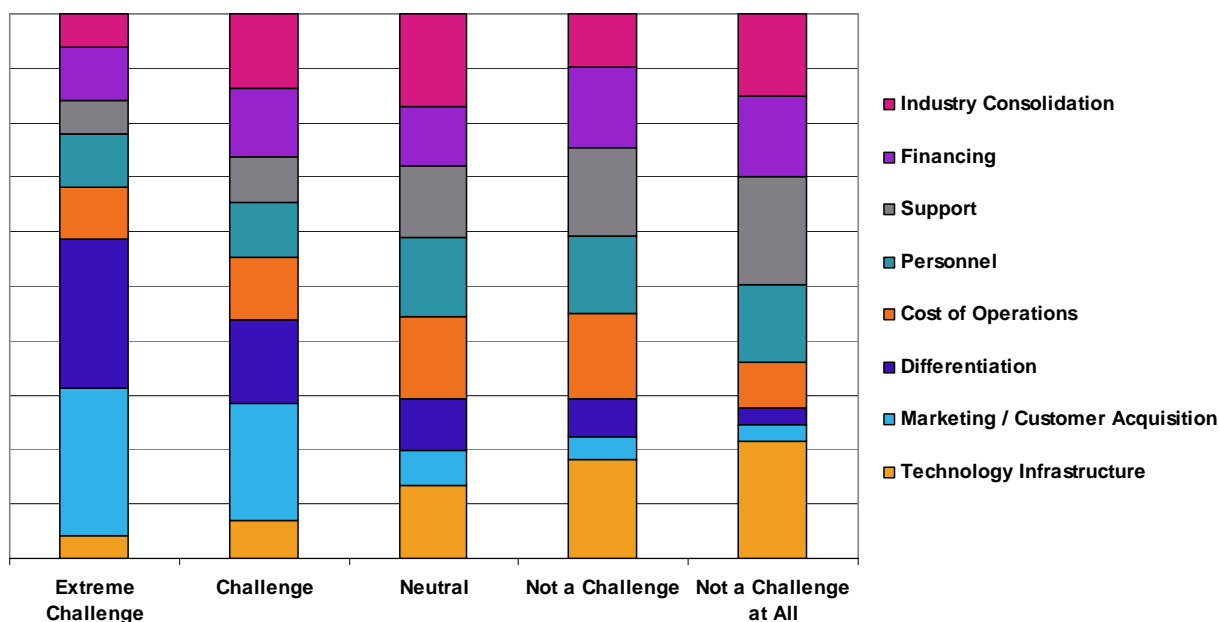
The following section contains the results of those who participated in the hosting provider portion of the survey who indicated that they represent a small hosting company / reseller as a provider of hosting services.

In the survey, a small hosting company / reseller was defined as having less than 1,000 accounts.

A total of **147** hosts are included in the responses to this section.

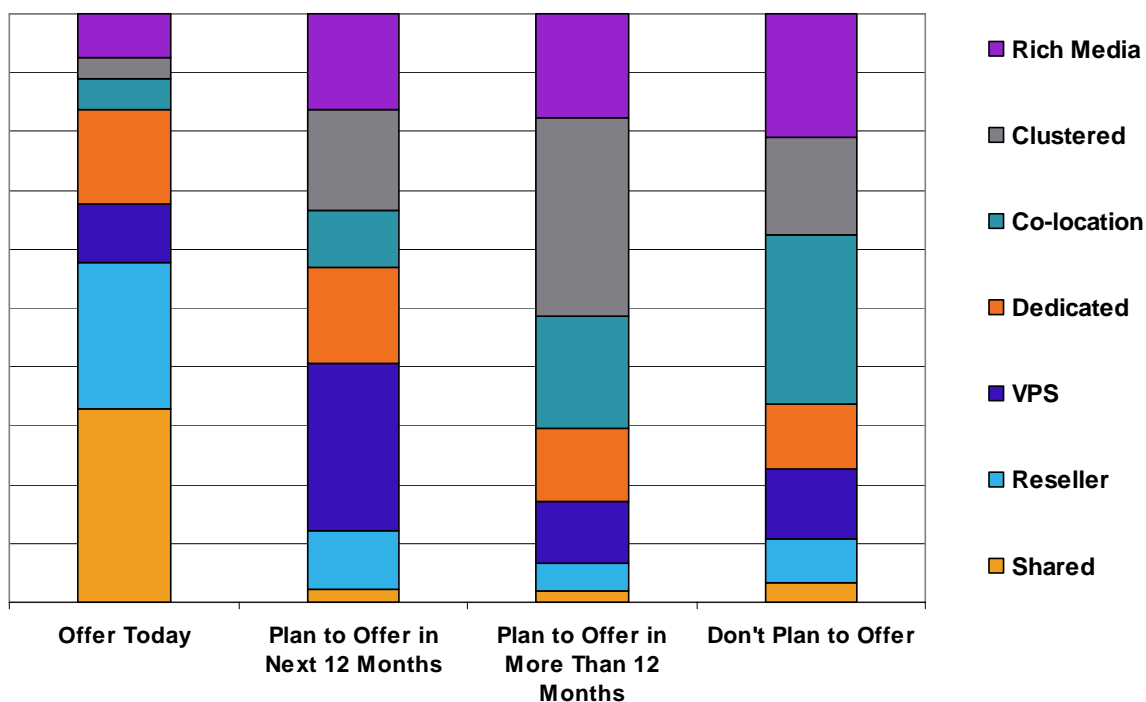
Q: As a hosting company, what are your greatest challenges?

	Extreme Challenge	Challenge	Neutral	Not a Challenge	Not a Challenge at All
Technology Infrastructure	6.1%	12.2%	25.9%	31.3%	24.5%
Marketing / Customer Acquisition	38.1%	38.8%	12.2%	7.5%	3.4%
Differentiation	38.8%	27.2%	18.4%	12.2%	3.4%
Cost of Operations	13.6%	20.4%	29.3%	27.2%	9.5%
Personnel	13.6%	17.7%	27.9%	24.5%	16.3%
Support	8.8%	15.0%	25.9%	27.9%	22.4%
Financing	13.6%	22.4%	21.1%	25.9%	17.0%
Industry Consolidation	8.8%	24.5%	32.7%	17.0%	17.0%



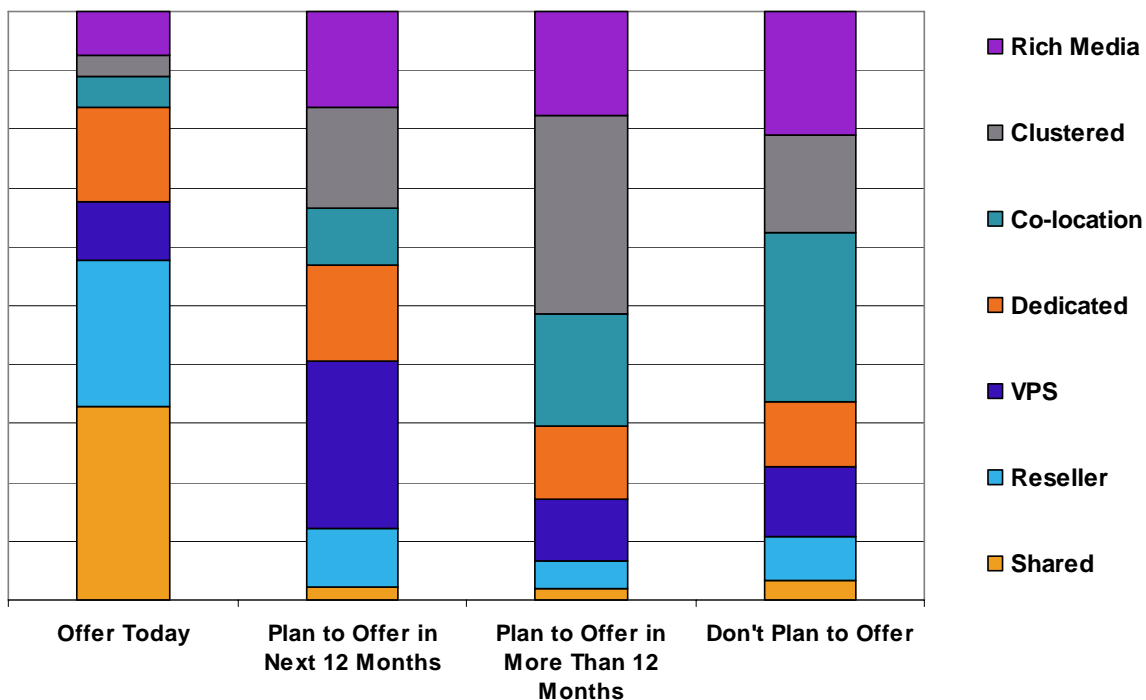
Q: What types of hosting do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Shared	88.4%	3.4%	2.0%	6.1%
Reseller	67.3%	14.3%	4.8%	13.6%
VPS	26.5%	41.5%	10.9%	21.1%
Dedicated	42.9%	23.8%	12.9%	20.4%
Co-location	14.3%	14.3%	19.7%	51.7%
Clustered	10.3%	24.8%	35.0%	29.9%
Rich Media	19.7%	23.8%	18.4%	38.1%



Q: What hosted applications do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Blogging Platforms	78.9%	6.8%	2.7%	11.6%
Photo Sharing / Image Galleries	74.8%	9.5%	2.0%	13.6%
Social Networking Platforms	72.1%	10.9%	4.1%	12.9%
Groupware	64.6%	10.2%	3.4%	21.8%
e-Commerce	78.2%	8.8%	4.1%	8.8%
VoiP	8.2%	24.5%	15.0%	52.4%
Productivity Applications	23.8%	16.3%	13.6%	46.3%



## **Provider Responses – Mid-Sized Hosts**

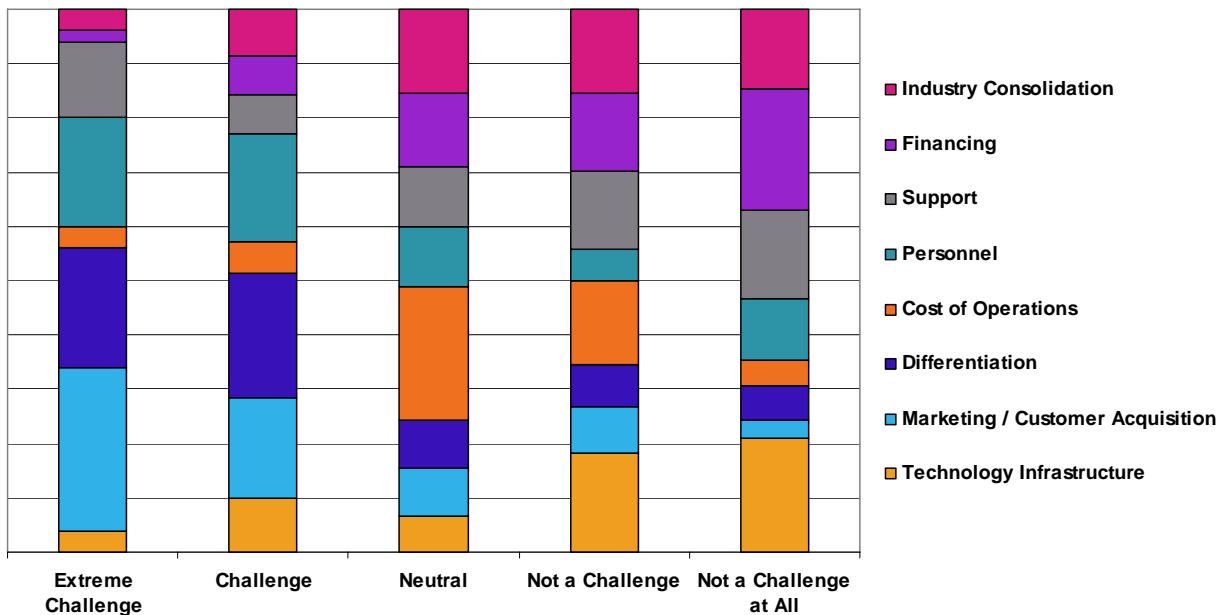
The following section contains the results of those who participated in the hosting provider portion of the survey who indicated that they represent a mid-sized host as a provider of hosting services.

In the survey, mid-sized host was defined as having between 1,000 and 25,000 accounts.

A total of **47** hosts are included in the responses to this section.

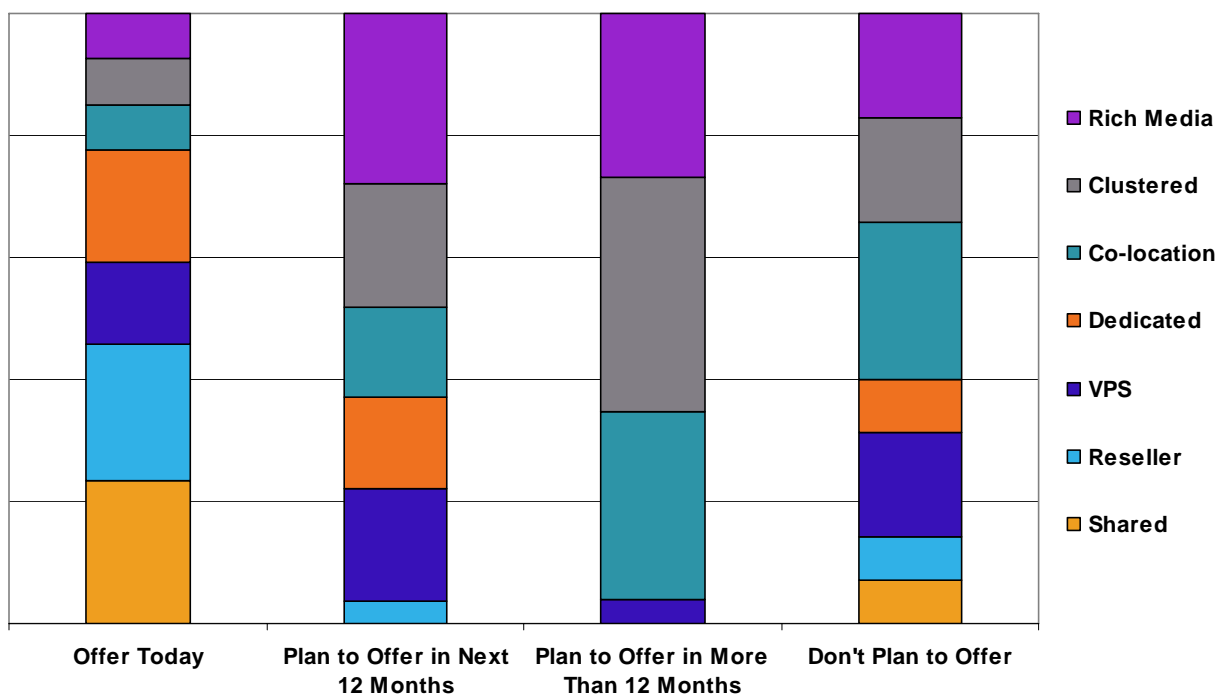
Q: As a hosting company, what are your greatest challenges?

	Extreme Challenge	Challenge	Neutral	Not a Challenge	Not a Challenge at All
Technology Infrastructure	4.3%	14.9%	12.8%	40.4%	27.7%
Marketing / Customer Acquisition	31.9%	27.7%	17.0%	19.1%	4.3%
Differentiation	23.4%	34.0%	17.0%	17.0%	8.5%
Cost of Operations	4.3%	8.5%	46.8%	34.0%	6.4%
Personnel	21.3%	29.8%	21.3%	12.8%	14.9%
Support	14.9%	10.6%	21.3%	31.9%	21.3%
Financing	2.1%	10.6%	25.5%	31.9%	29.8%
Industry Consolidation	4.3%	12.8%	29.8%	34.0%	19.1%



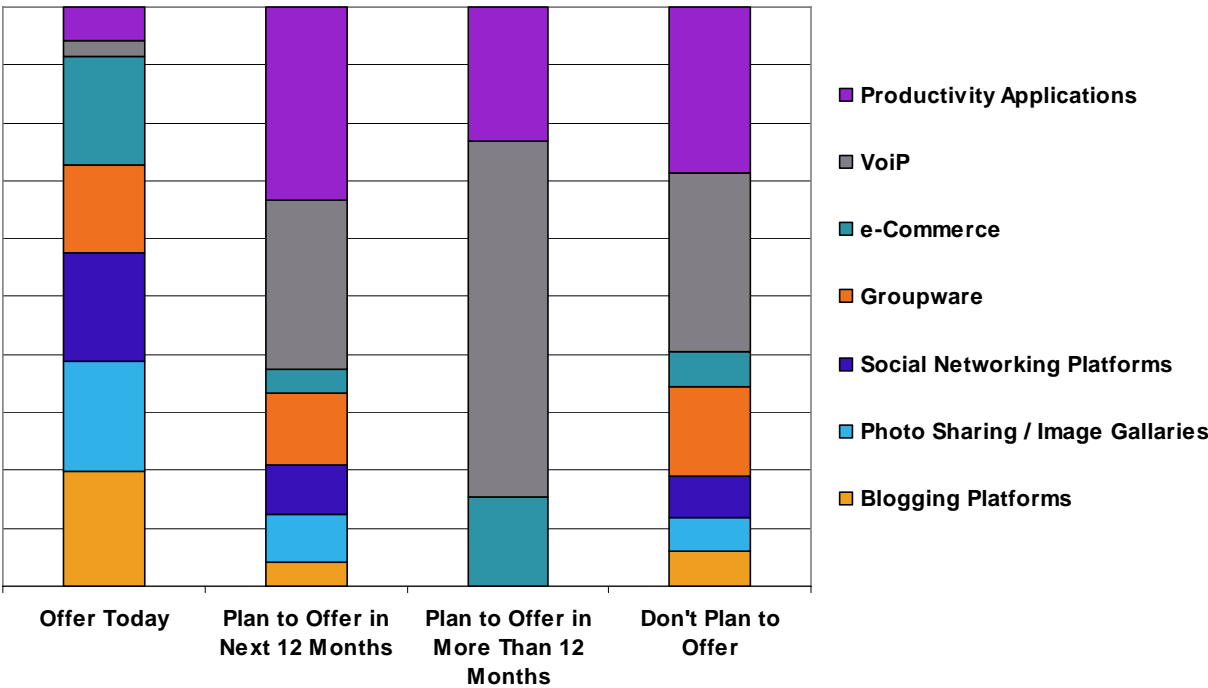
Q: What types of hosting do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Shared	89.4%	0.0%	0.0%	10.6%
Reseller	85.1%	4.3%	0.0%	10.6%
VPS	51.1%	21.3%	2.1%	25.5%
Dedicated	70.2%	17.0%	0.0%	12.8%
Co-location	27.7%	17.0%	17.0%	38.3%
Clustered	29.8%	23.4%	21.3%	25.5%
Rich Media	27.7%	31.9%	14.9%	25.5%



Q: What hosted applications do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
<b>Blogging Platforms</b>	87.2%	2.1%	0.0%	10.6%
<b>Photo Sharing / Image Galleries</b>	85.1%	4.3%	0.0%	10.6%
<b>Social Networking Platforms</b>	83.0%	4.3%	0.0%	12.8%
<b>Groupware</b>	66.0%	6.4%	0.0%	27.7%
<b>e-Commerce</b>	83.0%	2.1%	4.3%	10.6%
<b>VoiP</b>	12.8%	14.9%	17.0%	55.3%
<b>Productivity Applications</b>	25.5%	17.0%	6.4%	51.1%



## **Provider Responses – Large Hosts**

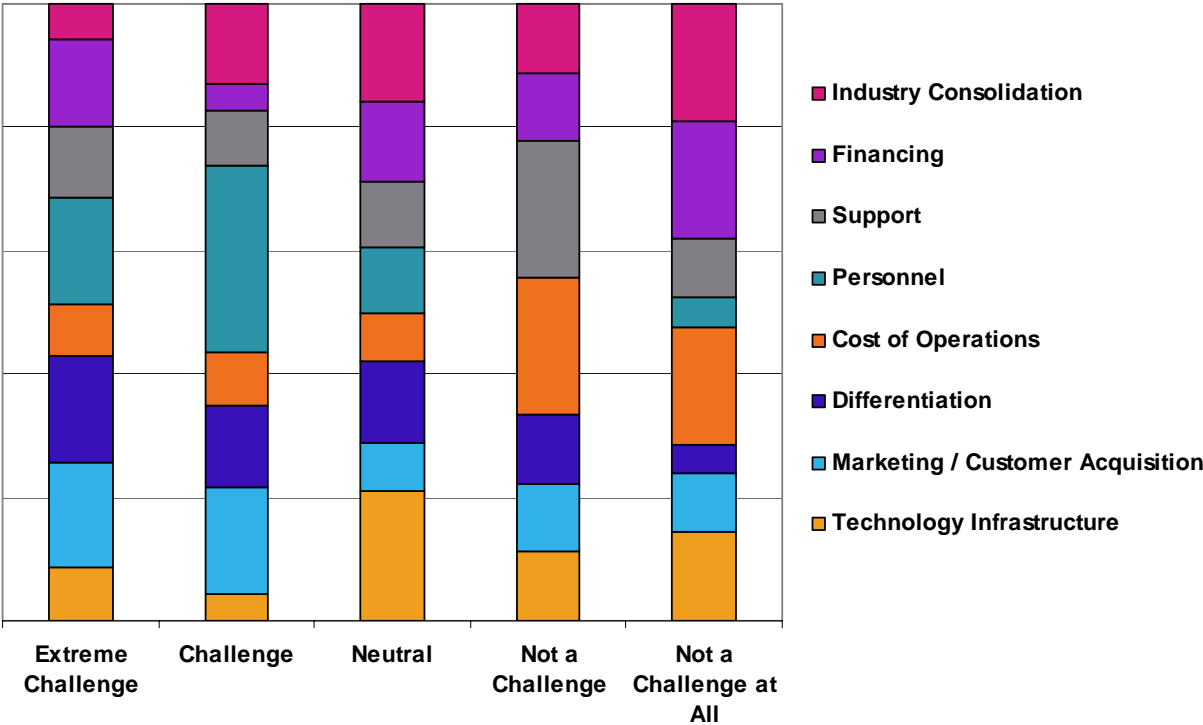
The following section contains the results of those who participated in the hosting provider portion of the survey who indicated that they represent a large hosting company as a provider of hosting services.

In the survey, a large hosting company was defined as having more than 25,000 accounts.

A total of **18** hosts are included in the responses to this section.

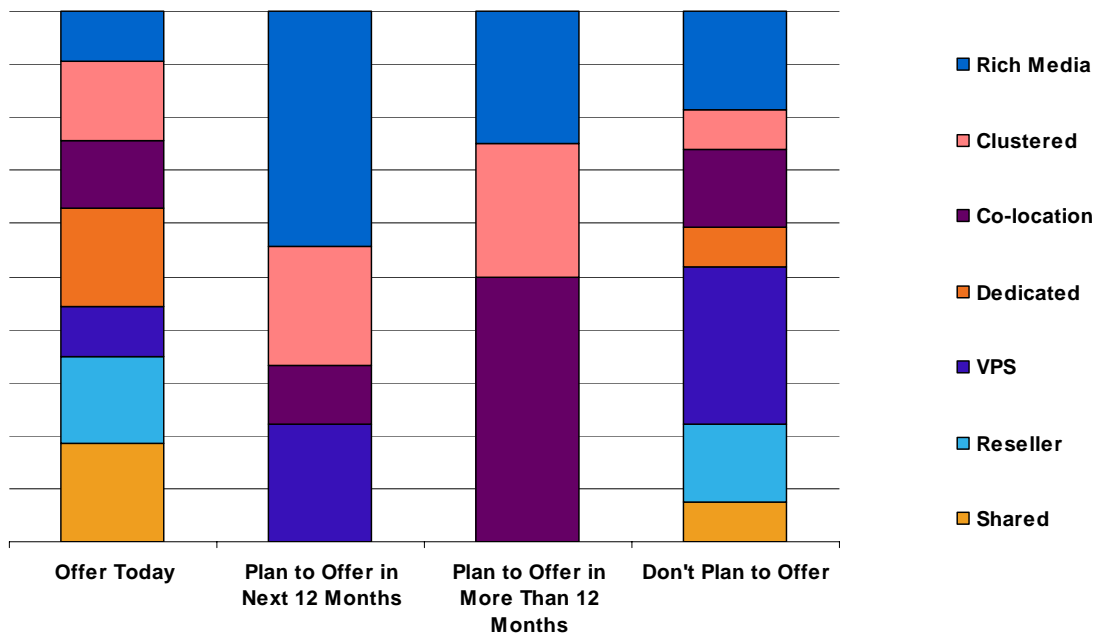
Q: As a hosting company, what are your greatest challenges?

	Extreme Challenge	Challenge	Neutral	Not a Challenge	Not a Challenge at All
Technology Infrastructure	16.7%	5.6%	44.4%	16.7%	16.7%
Marketing / Customer Acquisition	33.3%	22.2%	16.7%	16.7%	11.1%
Differentiation	33.3%	16.7%	27.8%	16.7%	5.6%
Cost of Operations	16.7%	11.1%	16.7%	33.3%	22.2%
Personnel	33.3%	38.9%	22.2%	0.0%	5.6%
Support	22.2%	11.1%	22.2%	33.3%	11.1%
Financing	27.8%	5.6%	27.8%	16.7%	22.2%
Industry Consolidation	11.1%	16.7%	33.3%	16.7%	22.2%



Q: What types of hosting do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Shared	88.9%	0.0%	0.0%	11.1%
Reseller	77.8%	0.0%	0.0%	22.2%
VPS	44.4%	11.1%	0.0%	44.4%
Dedicated	88.9%	0.0%	0.0%	11.1%
Co-location	61.1%	5.6%	11.1%	22.2%
Clustered	72.2%	11.1%	5.6%	11.1%
Rich Media	44.4%	22.2%	5.6%	27.8%



Q: What hosted applications do you offer or plan to offer?

	Offer Today	Plan to Offer in Next 12 Months	Plan to Offer in More Than 12 Months	Don't Plan to Offer
Blogging Platforms	72.2%	5.6%	5.6%	16.7%
Photo Sharing / Image Galleries	72.2%	5.6%	5.6%	16.7%
Social Networking Platforms	72.2%	5.6%	0.0%	22.2%
Groupware	55.6%	11.1%	0.0%	33.3%
e-Commerce	72.2%	0.0%	5.6%	22.2%
VoiP	27.8%	5.6%	5.6%	61.1%
Productivity Applications	33.3%	0.0%	16.7%	50.0%

