

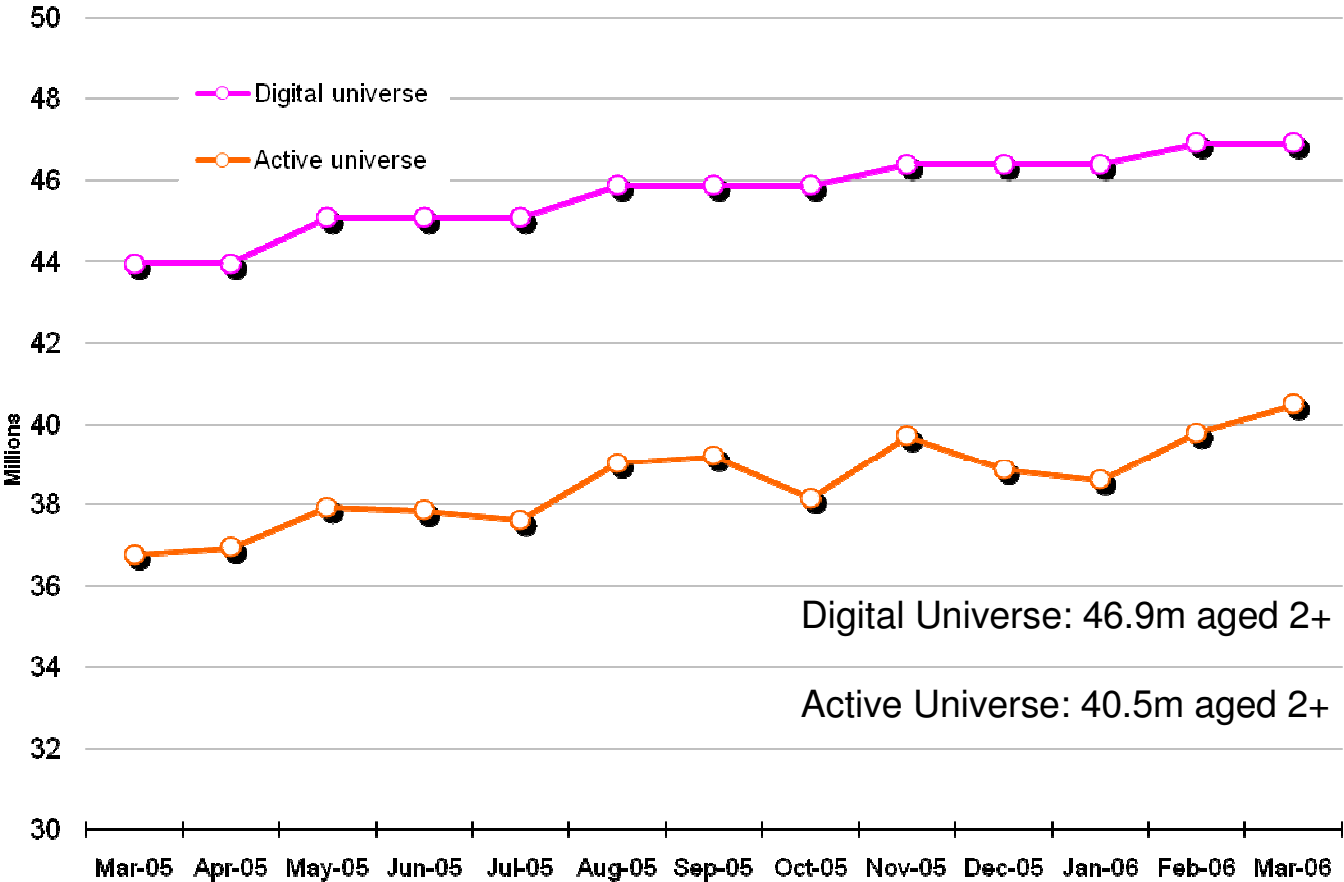
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## **Digital Overview**

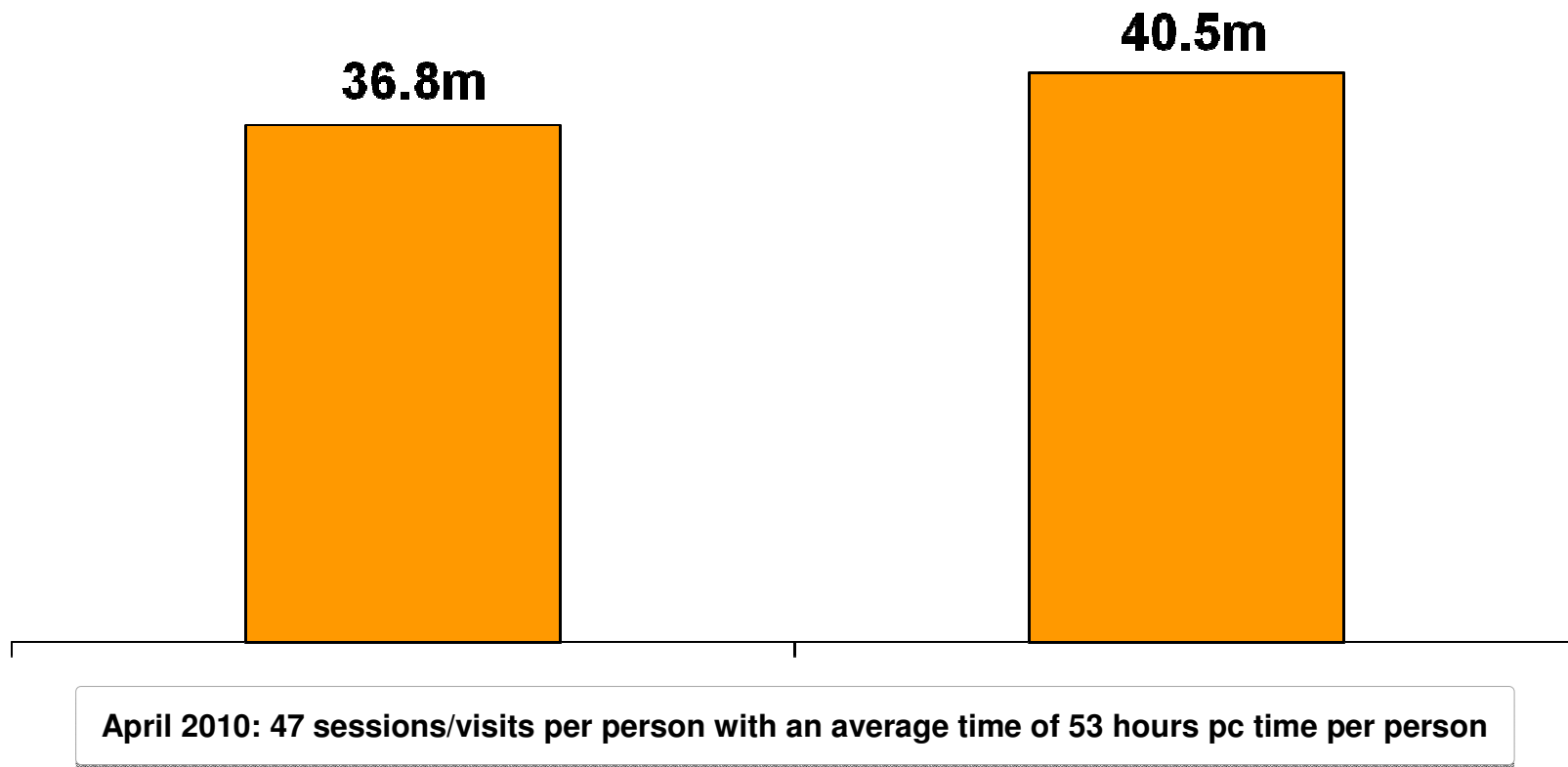
**January 2011**

# Over 40m active internet users



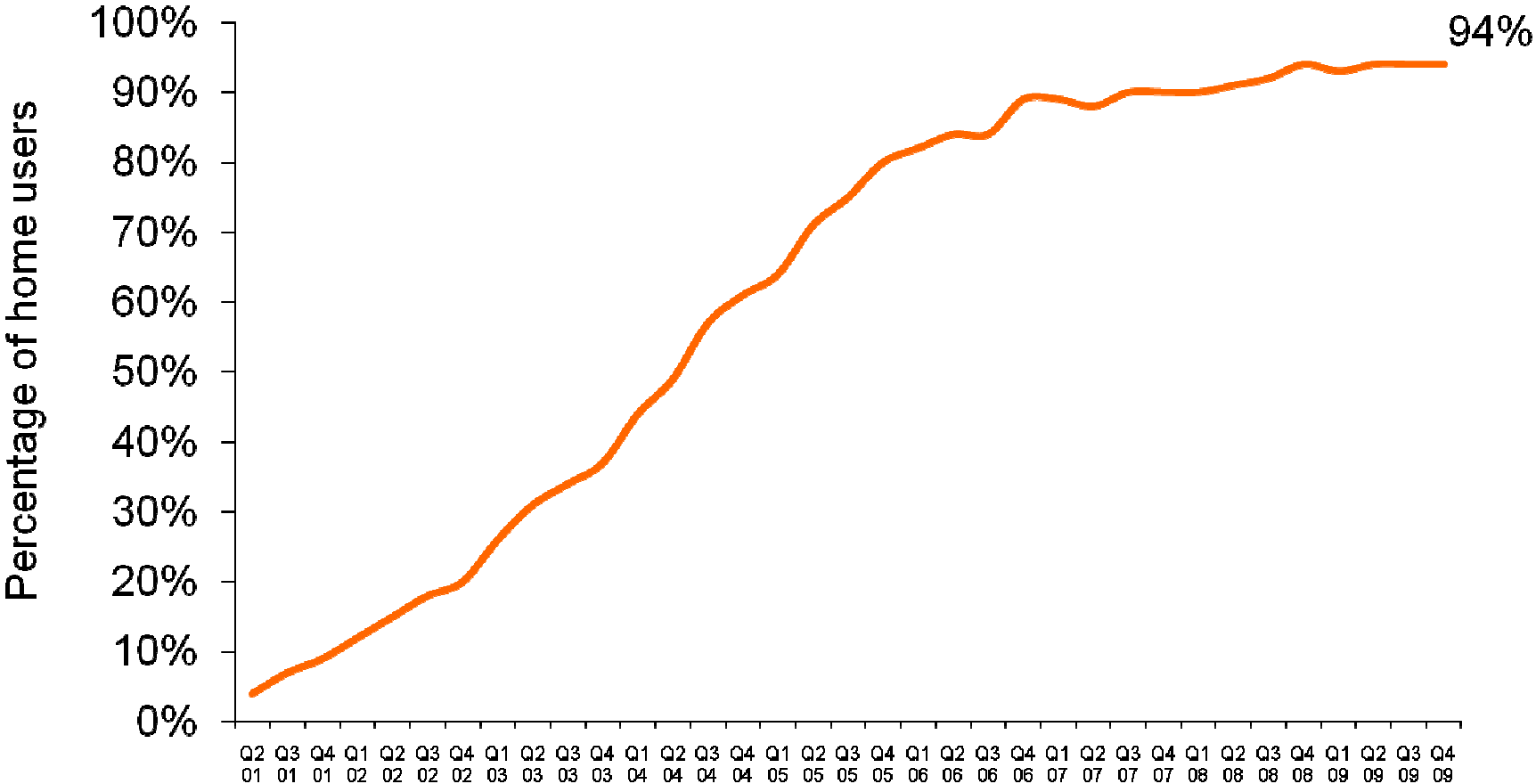
Source: UKOM APS April 2010; Nielsen Netview

# UK Internet audience up 10% on 2009



Source: UKOM APS April 10 vs April 09

# The penetration of broadband access at home steadies

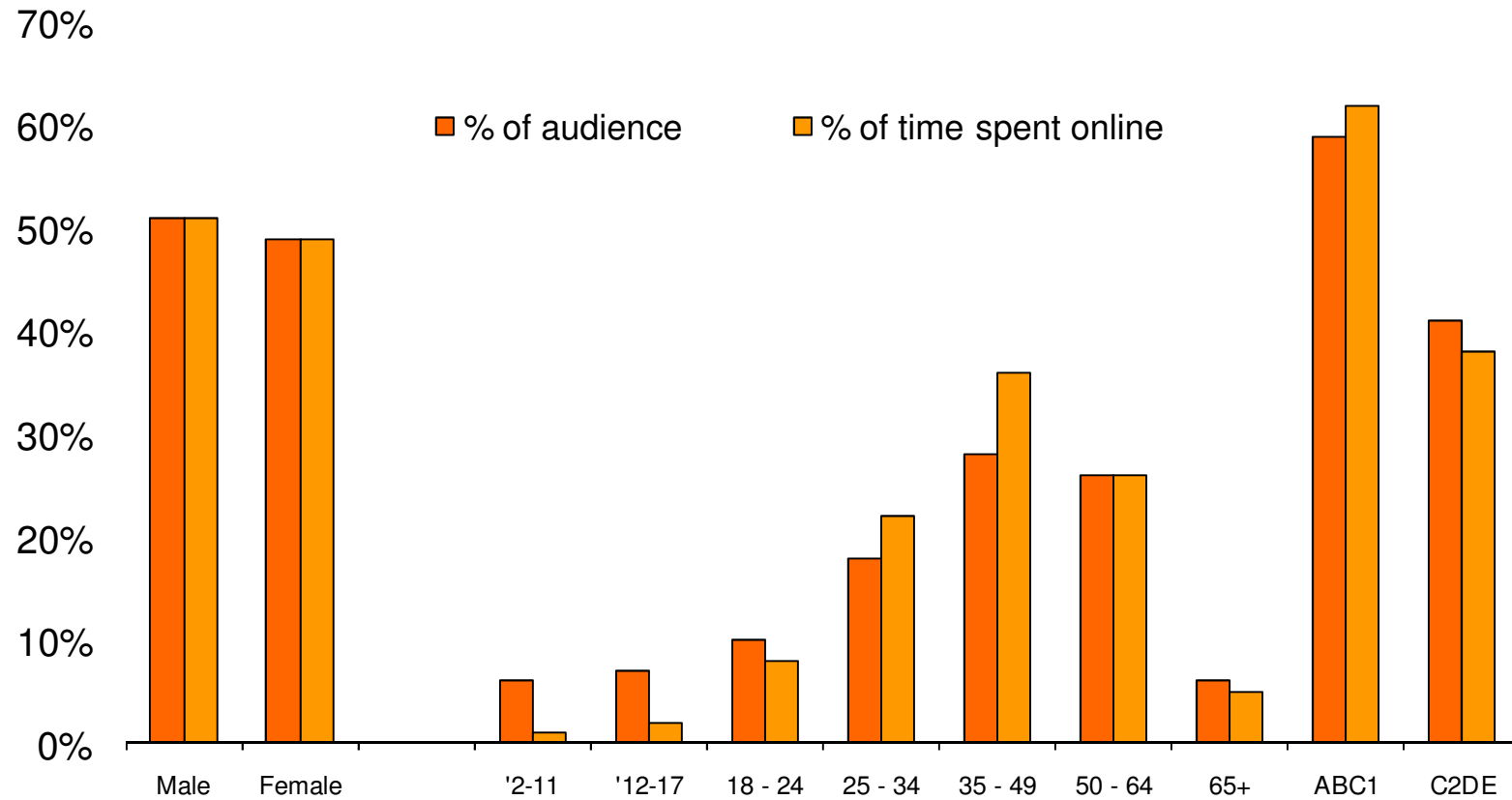


Source: Kantar Media's Internet Monitor, Wave 50, Nov 2009



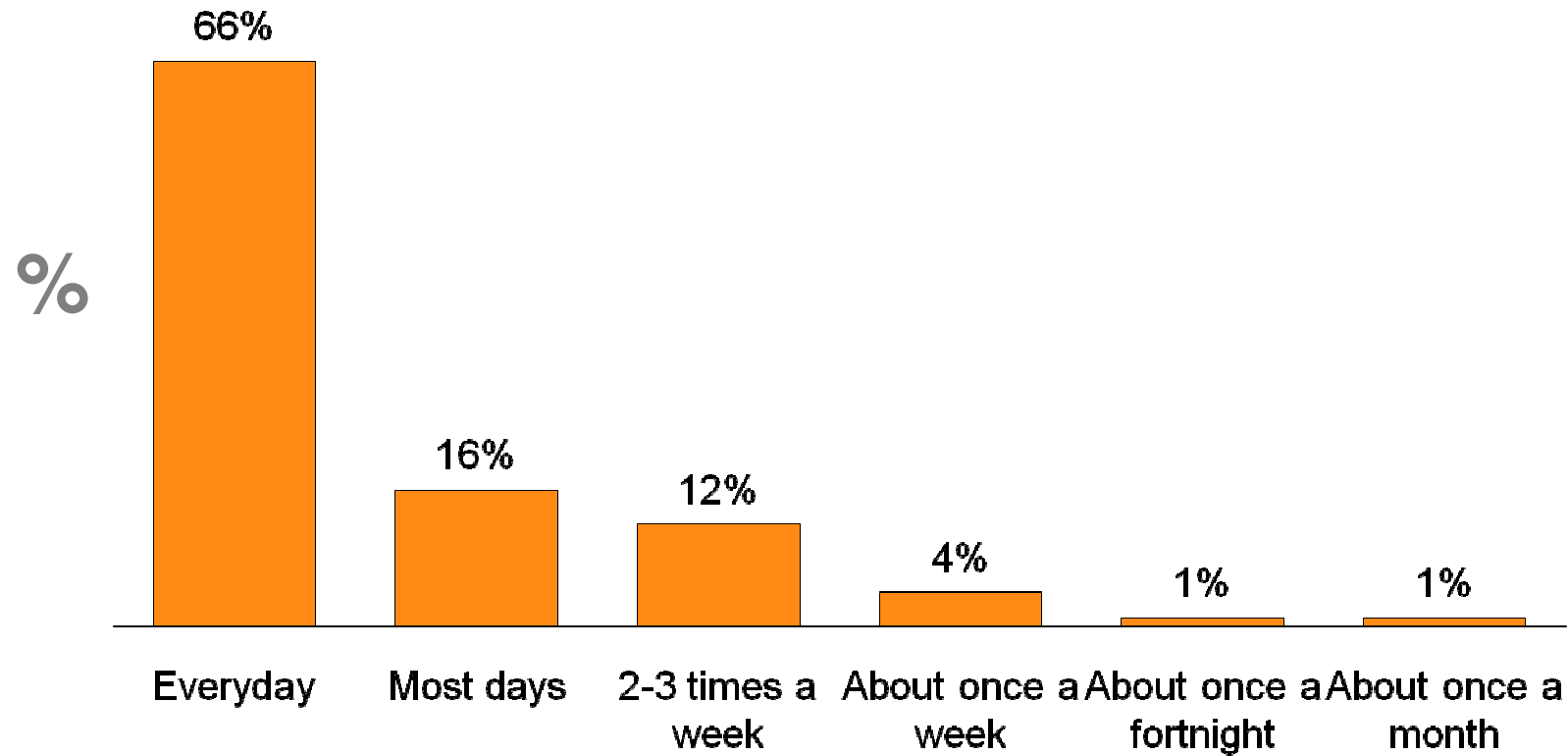
Base: All who have used the Internet at home on a computer in the last month

# ABC1's & 35 – 49 year olds heavy online users



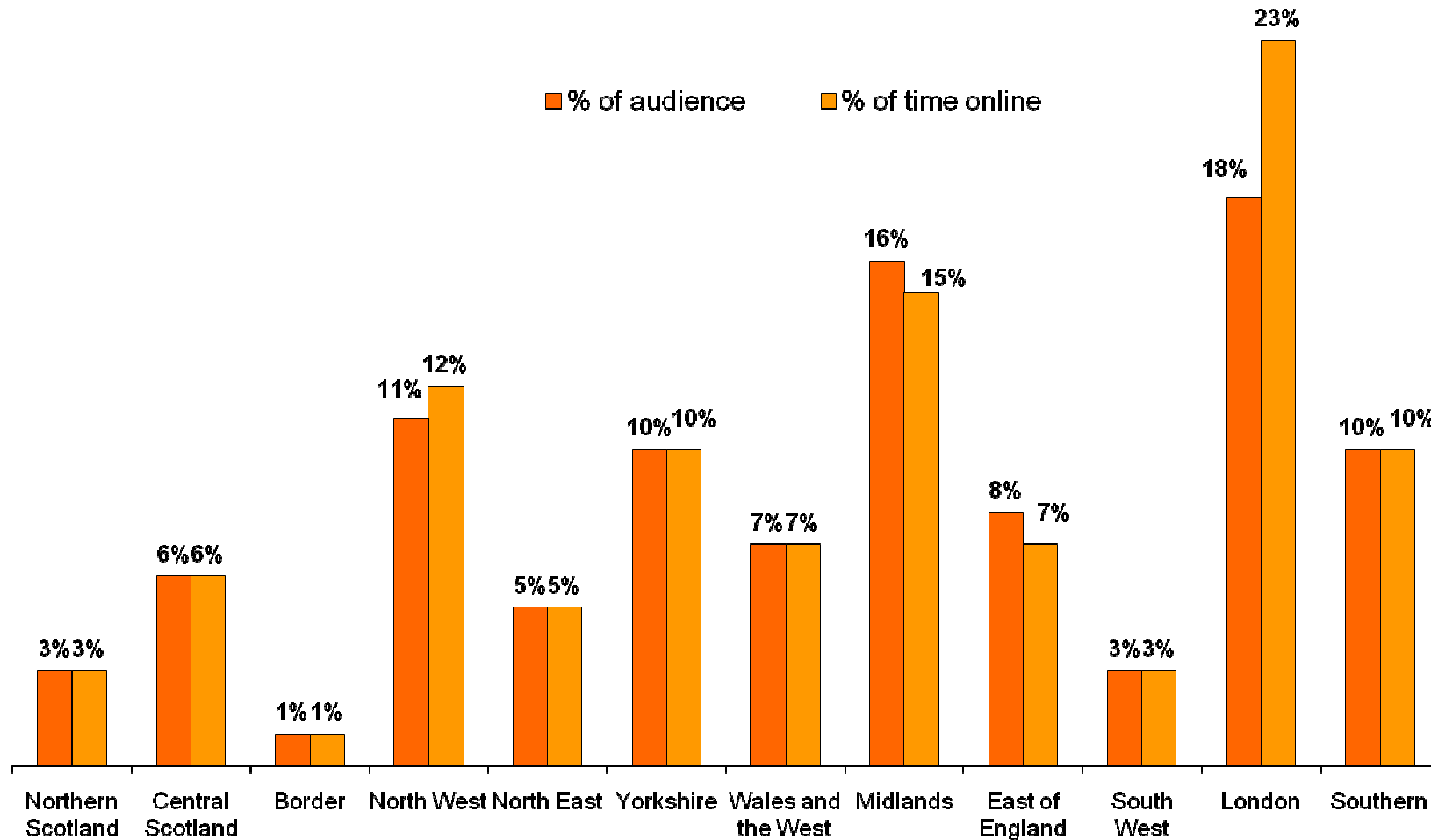
Source: UKOM, April 2010

# 8 In 10 internet users going online everyday or most days



Source: Kantar Media's Internet Monitor, wave 50, November 2009

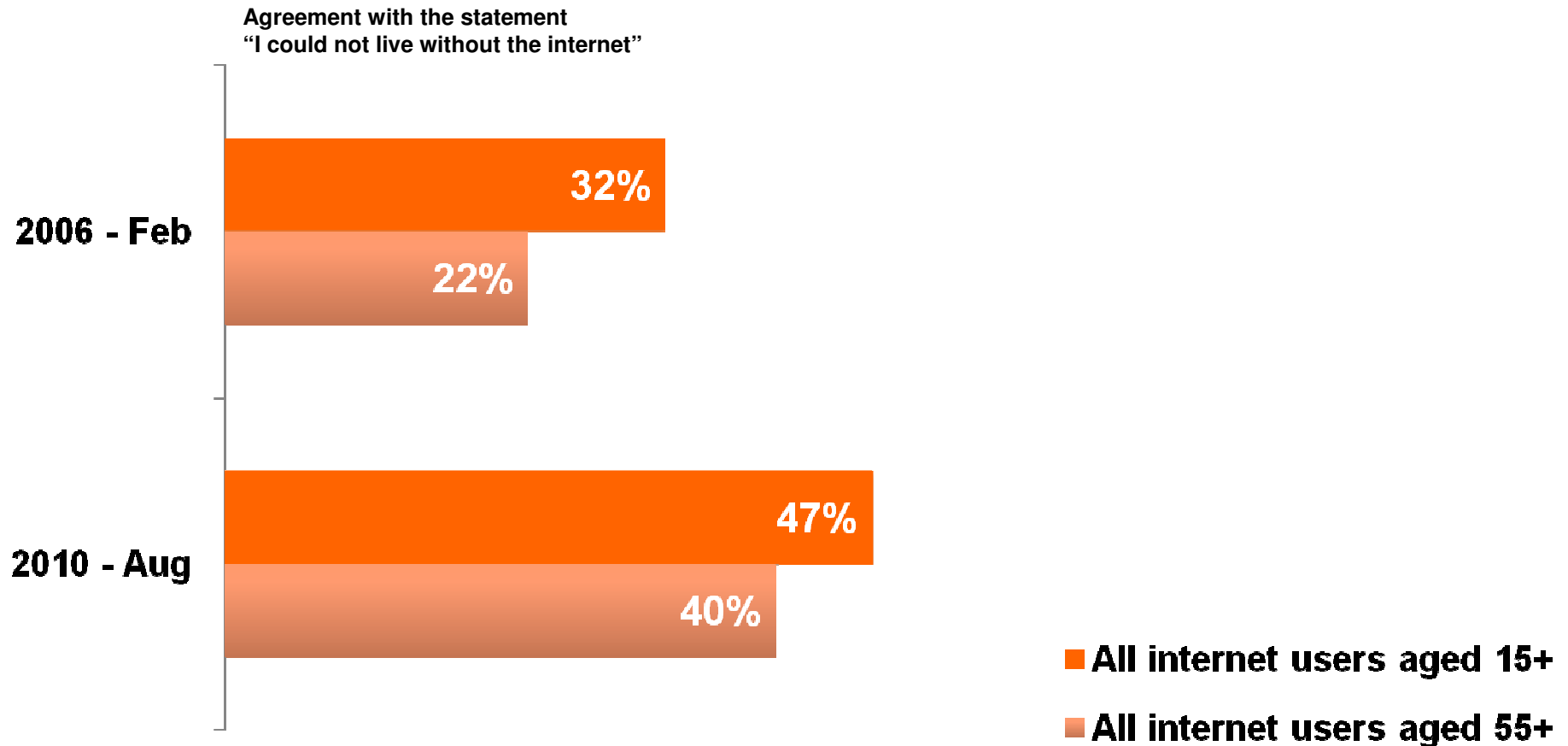
# Londoners spend disproportionate amount of time online



Source: UKOM, April 2010

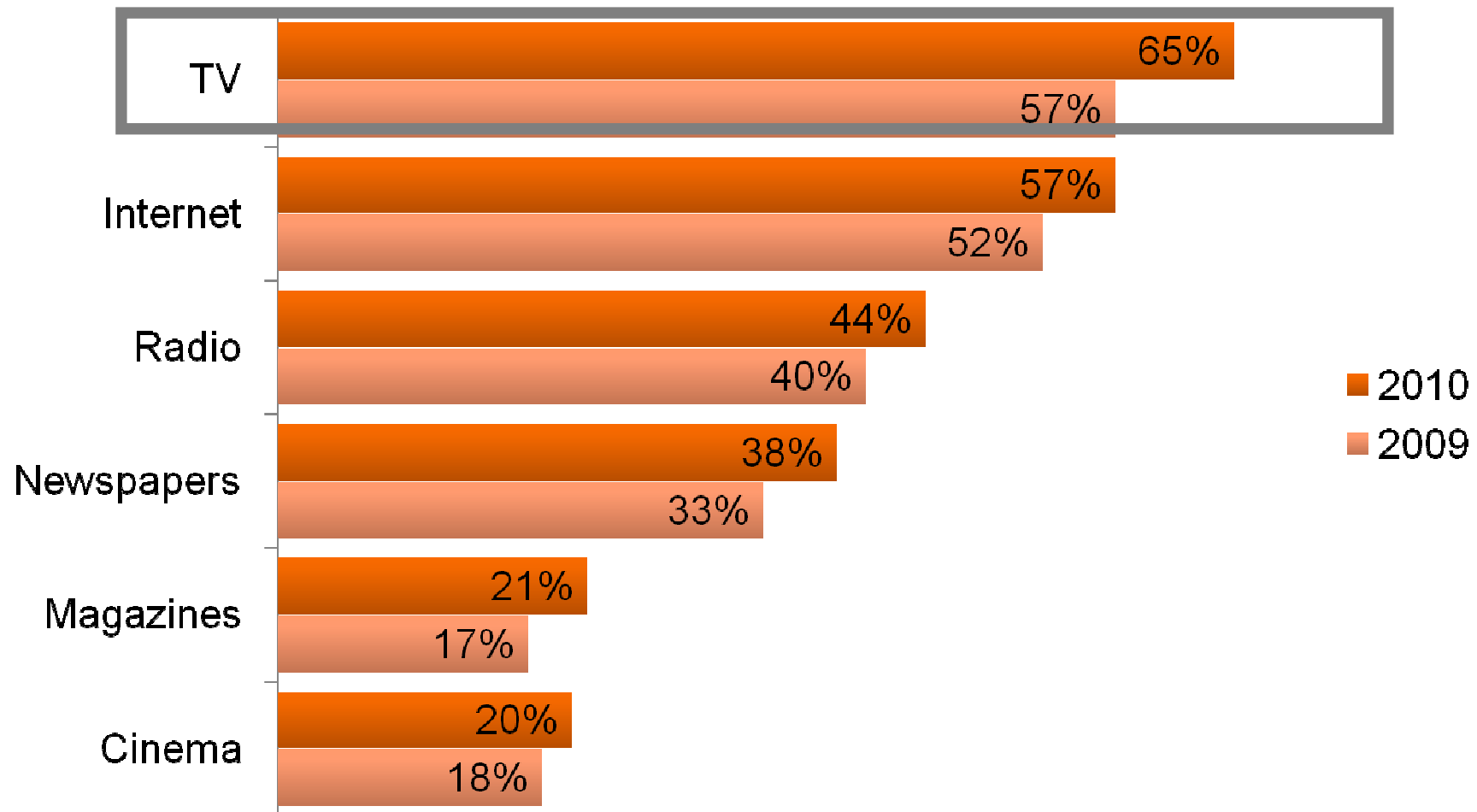
# The internet is playing a more important part in consumers' everyday lives

...and not just for younger people



Source: Internet Monitor

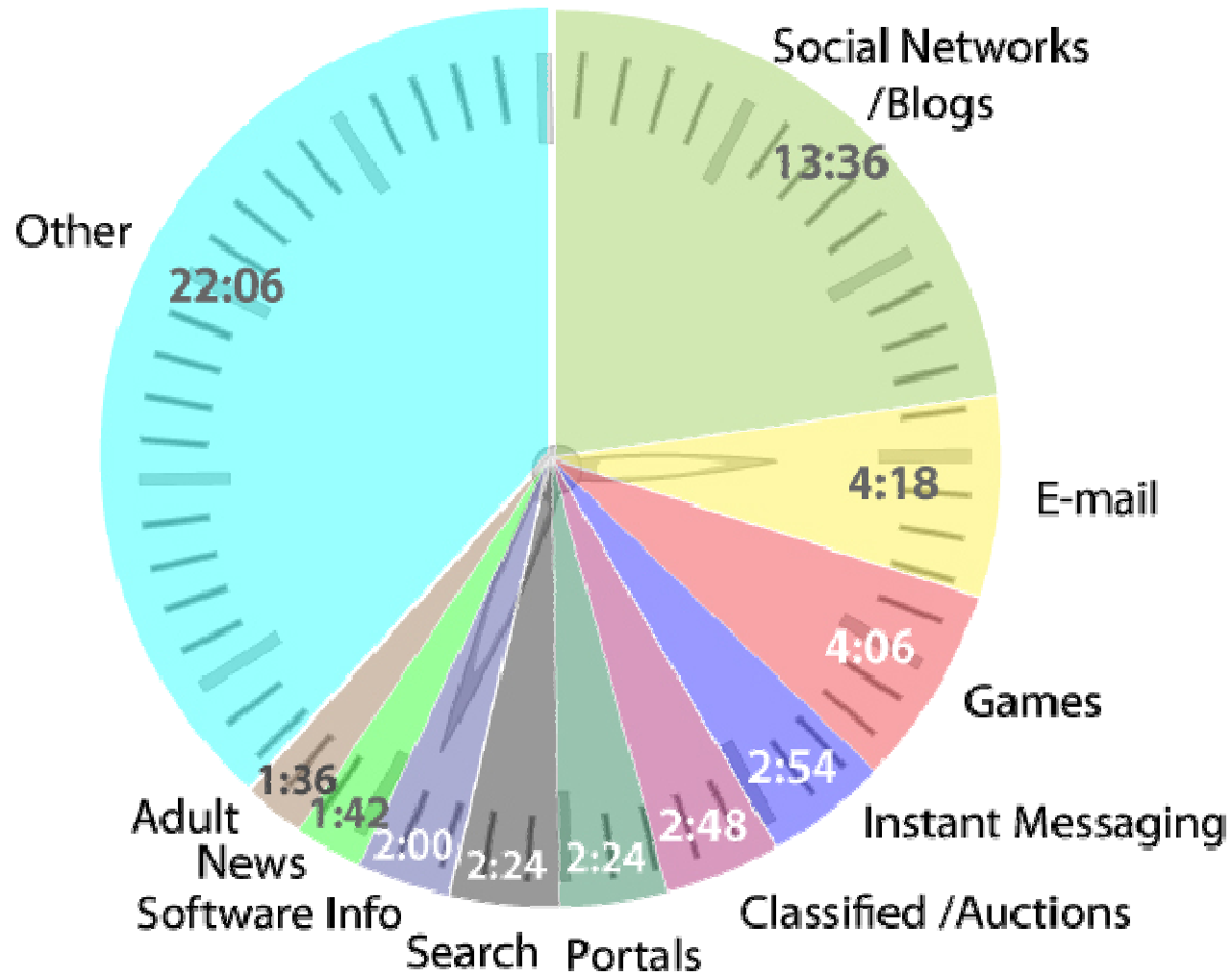
# As the internet becomes more important to people, the importance of other media is not diminishing



Source: FutureProof

Base: All aged 12+ (2010 – 2,234, 2009 – 2,429)

# The rise of social networks



Source: UKOM April 2010

# Why does it matter so much?

**Social Networking has overtaken porn as the number one activity online.**

**Accounting for 10% of all internet time**

# Statistics to make you sit up

**24 hours**

The amount of video uploaded to Youtube every minute

**17,000,000**

The number of articles on Wikipedia

**5,000,000,000**

Photos on Flickr (that's 1 photo for every 1.5 people on the planet)

**2,940**

Tweets per second in the 30 second period after Japan scored against Cameroon on in the World Cup

**23,000,000,000**

The number of minutes spent on Facebook every day



# Statistics to make you sit up

**If Facebook was a country...**

**It would be the 3rd largest in the world**

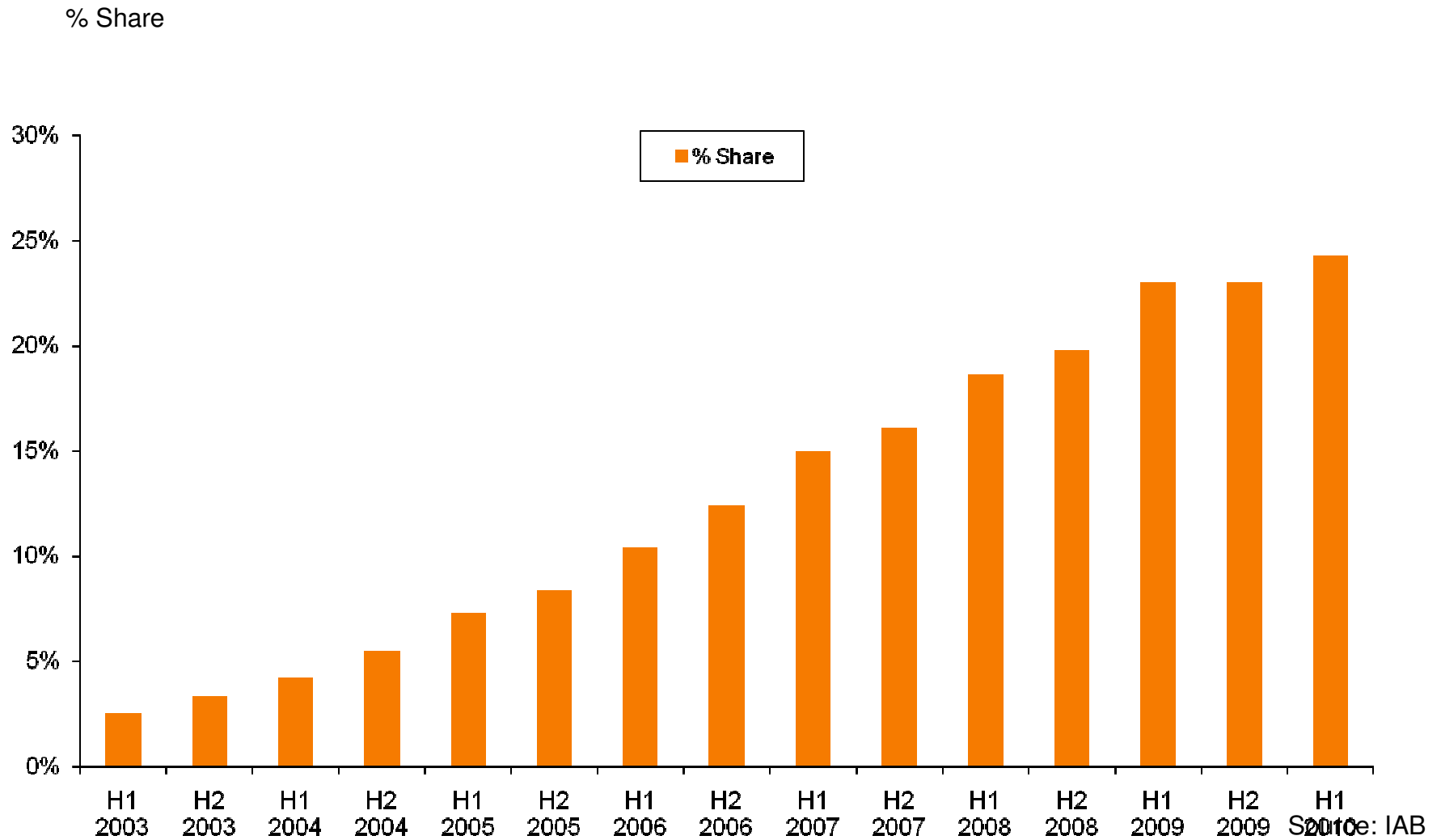
**With 500 million active users!**

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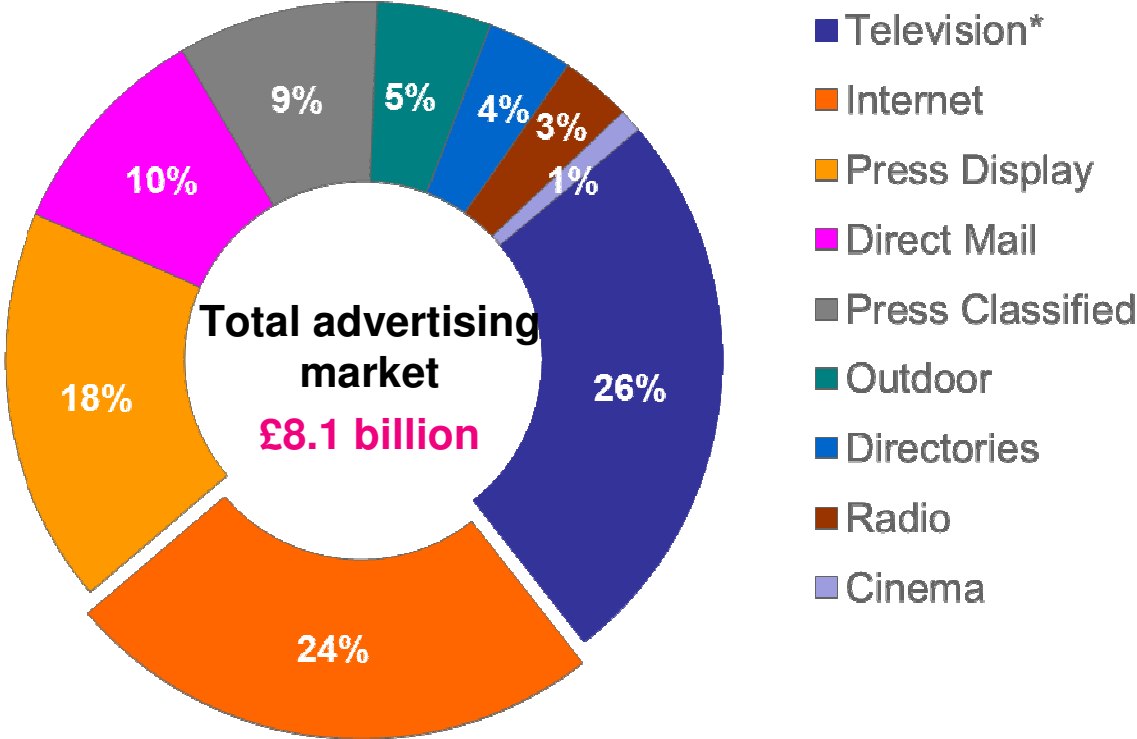
data-driven insights

# Online advertising market share reaches new high of 24%

Which puts online in a more central position in the planning process



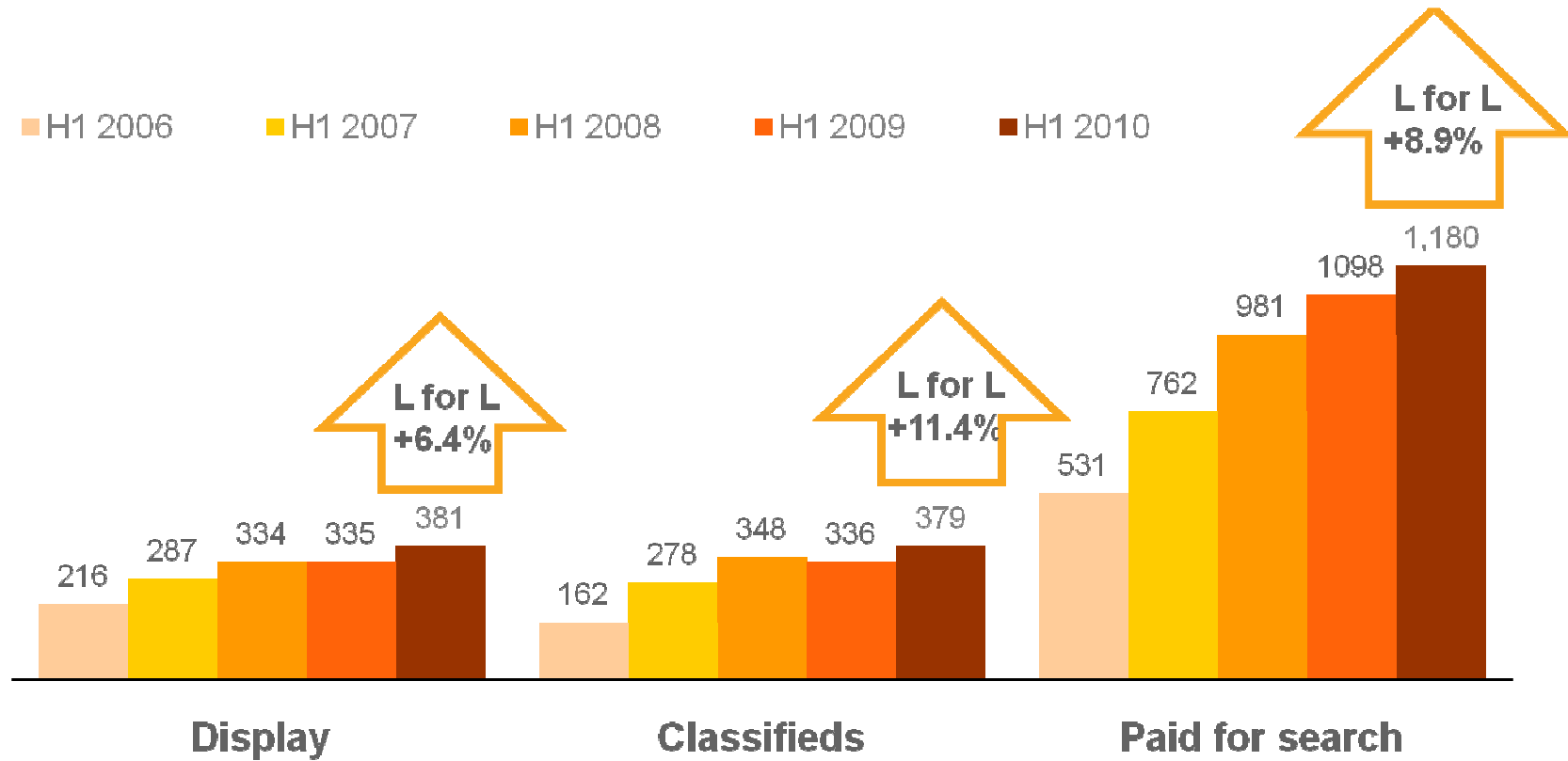
# On-line's market share for H1 2010 was 24%



NOTE \* Television includes estimated sponsorship revenues  
Source: PwC / Internet Advertising Bureau, The Advertising Association / WARC

# Digital advertising spend

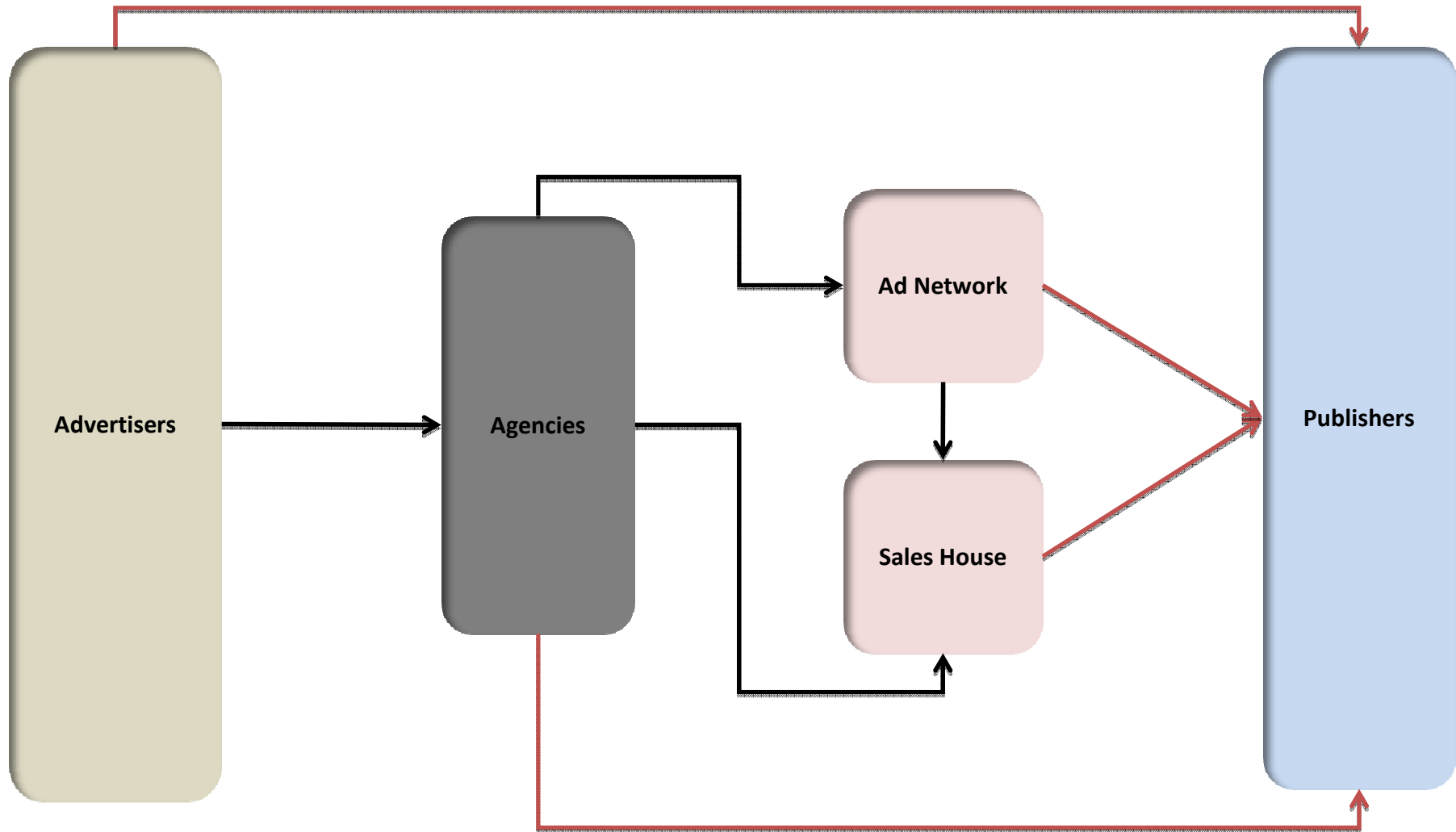
On a like-for-like basis all formats showed an increase in the last 12 months



Source: IAB/PWC H1 2010 UK online adspend study

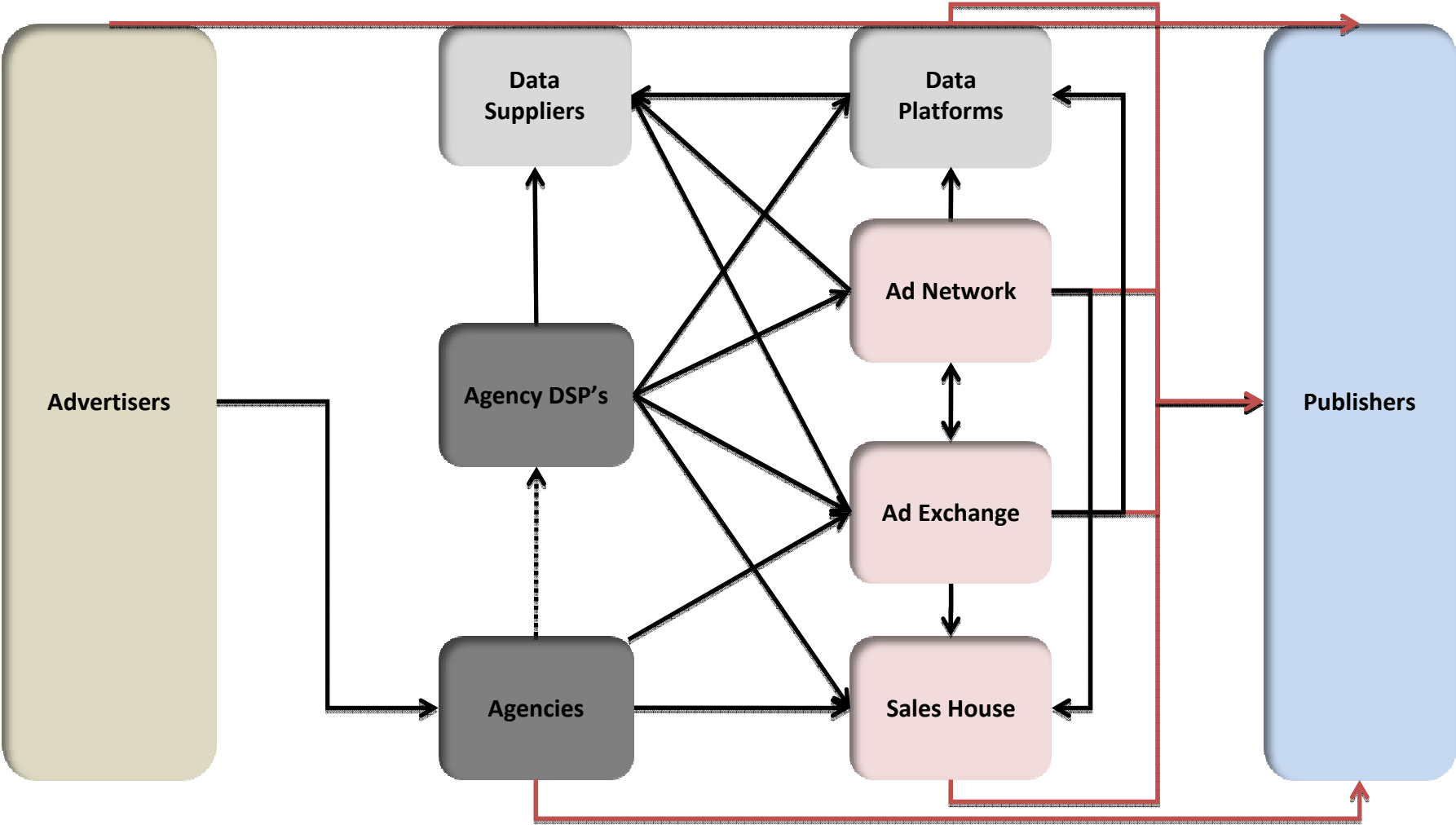
# A change in trading dynamics

Old display media trading model



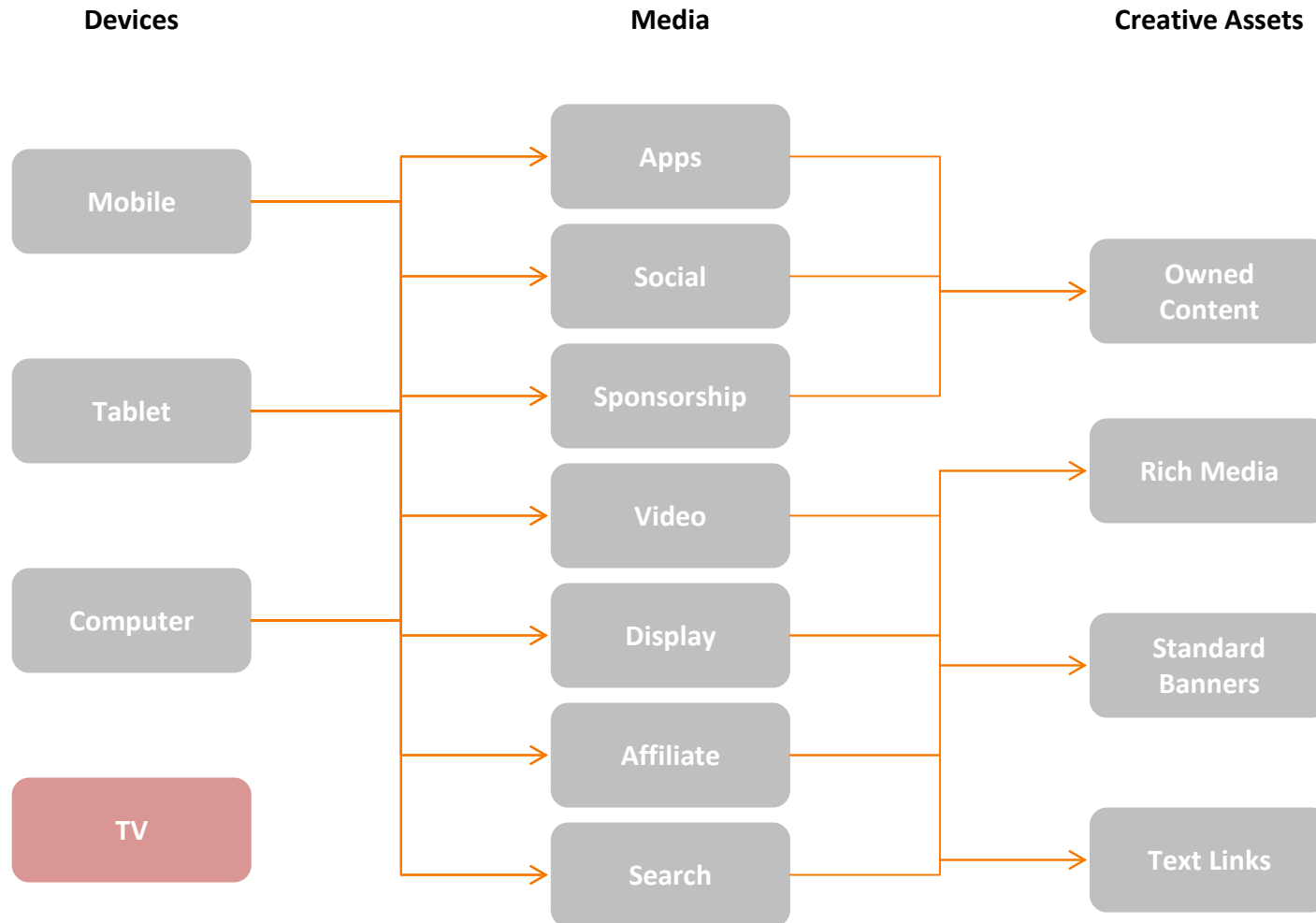
# A change in trading dynamics

Evolving display media trading model



# Looking at digital media as a whole...

It's become a complicated medium to manage



# What you can expect from us

What's going on in your market

How you are doing

What you can do to be more successful

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