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Technology Adoption Statistics Compendium

August 2010

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1. About this report

This is one of 11 reports that make up the Econsultancy Internet Statistics Compendium, a collection of the most recent statistics and market data publicly available on online marketing, e-commerce, the internet and related digital media. The compendium is a **one-stop shop for internet stats** to help you quickly track down the latest data. You can download the full compendium in one file at http://econsultancy.com/reports/internet-statistics-compendium

The other reports in the compendium are:

- Affiliate Marketing
- Customer Experience
- Demographics
- E-commerce
- Email Marketing
- Mobile
- Internet Advertising
- Search Marketing
- Social Media
- Web Analytics

The information contained – including charts and graphs – is taken largely from third party sources, credited throughout the document and in the acknowledgements at the back of this guide.

If there is data that you feel is inaccurate, missing, or incorrectly credited then please get in touch with Econsultancy's Research Director Linus Gregoriadis: linus@econsultancy.com or phone +44 (0)20 7269 1450. Likewise, if you would like to contribute data or research then contact us.

1.1. About Econsultancy

Econsultancy is a digital publishing and training group that is used by more than 200,000 internet professionals every month.

The company publishes practical and timesaving research to help marketers make better decisions about the digital environment, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy has offices in New York and London, and hosts more than 100 events every year in the US and UK. Many of the world's most famous brands use Econsultancy to educate and train their staff.

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2. Video

2.1. Market Size & Growth Trends

United Kingdom

- Video currently accounts for more than one third of overall consumer internet traffic and will edge towards the 40% mark by the end of this year, excluding P2P video file sharing [Source: Cisco, via AOP Digital Landscape Report, June 2010]
- 5.5 billion videos were viewed online in the UK in February 2010, up 37% versus the previous year. [Source: Online Video Report, comScore, April 2010]
- BBC sites ranked second with 140 million videos viewed on its sites followed by Megavideo.com with 53 million videos. [Source: Online Video Report, comScore, April 2010]
- Facebook ranked as the fastest growing video property in the top 10, surging 205% in the past year to 43 million videos viewed. [Source: Online Video Report, comScore, April 2010]
- Top UK video properties, February 2009 vs. February 2010 [Source: Online Video Report, comScore, April 2010]

Top U.K. Online Video Content Properties* by Videos Viewed
February 2010 vs. February 2009
Total U.K., Age 15+ – Home & Work Locations
Source: comScore Video Metrix

Property	Videos Viewed (000)		
	Feb-09	Feb-10	% Change
Total Internet : Total Audience	4,017,400	5,504,984	37
Google Sites	2,111,012	2,477,398	17
BBC Sites	57,567	139,788	143
Megavideo.com	26,289	53,485	103
Facebook.com	14,001	42,674	205
Microsoft Sites	36,899	41,424	12
Channel4	31,335	39,364	26
Dailymotion.com	17,804	31,360	76
ITV Sites	12,085	28,245	134
Blinkx	9,501	28,840	204
Sky Sites	8,171	19,541	139

*Rankings based on video content sites; excludes video server networks. Online video includes both streaming and progressive download video. Growth for Top 10 Sites not fastest growing sites within category.

- Comparison of Top 3 TV Broadcast Network Content Sites [Source: Online Video Report, comScore, April 2010]

Comparison of Top 3 TV Broadcast Network Content Sites
February 2010
Total U.K., Age 6+ – Home & Work Locations
Source: comScore Video Metrix

Target Audience	BBC Sites		Channel 4		ITV Sites	
	Composition Index for Unique Viewers*	Videos per Viewer	Composition Index for Unique Viewers	Videos per Viewer	Composition Index for Unique Viewers	Videos per Viewer
Total Audience	100	15.7	100	18.8	100	13.5
All Males	110	15.8	100	16.3	84	12.7
All Females	90	15.5	99	21.7	119	14.1
Persons - Age						
15-24	88	15.2	154	21.5	92	16.7
25-34	112	15.0	121	17.4	98	12.1
35-44	113	17.5	80	20.9	104	13.5
45-54	110	15.1	82	14.4	115	13.1
55+	89	14.9	65	17.0	101	11.7

*Composition Index = % of Viewers at a Site from a Particular Demo Segment / % of Total Internet Population from the Demo Segment x 100; Index of 100 indicates average representation.

- Pre-roll and Post-roll video advertising grew over 140% year on year from £11.7m in 2008 to £28.3m in 2009. [Source: Internet Advertising Bureau Fact Sheet, IAB, March 2010]
- There was growth across the board in online video in 2009, with the total audience base growing 18% to 35.6 million viewers, total videos viewed up 80% to 6.7 billion viewers, and engagement metrics such as videos per viewer up 52% and minutes per video also increasing by 27%. [Source: comScore, December 2009]
- iPlayer was the second most popular video website in the UK last week, picking up 13.3% of visits to sites in the Hitwise online video category (which remains dominated by YouTube, with a 65.1% share). [Source: Hitwise, July 2009]

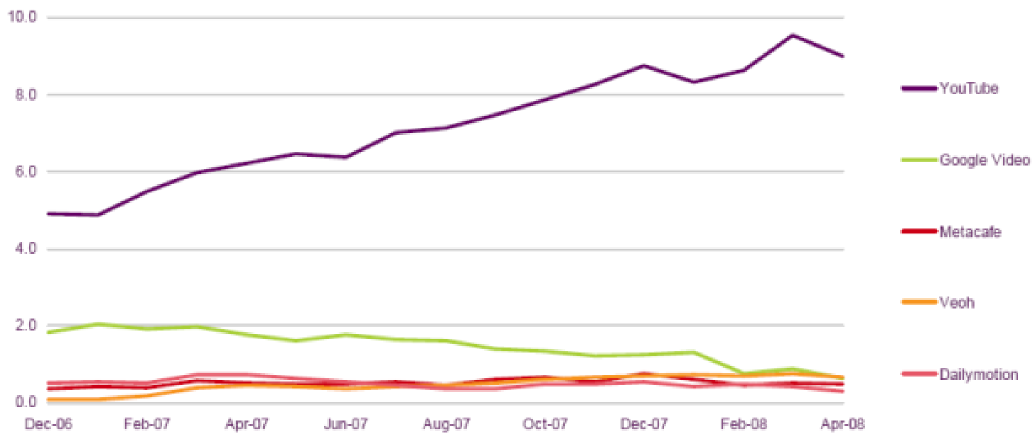
- The total number of videos viewed online in the UK in April 2009 grew 47 % versus year ago to 4.7bn videos. [Source: comScore, July 2009]

Top U.K. Online Video Properties Ranked by Total Videos Viewed (000)* April 2009 vs. April 2008 Total U.K. – Age 15+, Home & Work Locations Source: comScore Video Metrix**			
Property	**Apr-2008**	**Apr-2009**	**% Change**
Total Internet : Total Audience	*3,178,930*	*4,659,215*	*47%*
Google Sites	1,532,531	2,415,292	58%
BBC Sites	47,495	79,416	67%
ITV Sites	17,191	34,723	102%
Megavideo.com	10,298	31,743	208%
Microsoft Sites	23,907	30,205	26%
Channel4	12,256	20,434	67%
Dailymotion.com	11,143	20,155	81%
AOL LLC***	2,615	19,135	632%
Fox Interactive Media	N/A	18,919	N/A
Facebook.com	5,148	17,028	23

- UK internet traffic to online video websites increased by 178% between February 2007 and 2008 [Source: Hitwise, March 2008]

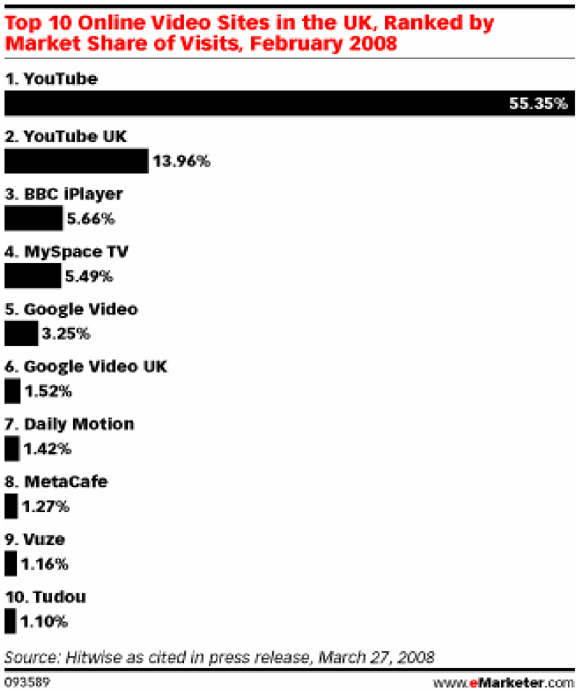
- UK viewers of selected video sites, Dec 2006 to Apr 2008. [Source: Nielsen Online via Ofcom, Aug 2008]

Figure 2.50 **Unique visitors to selected video-sharing sites**



Source: Nielsen Online

- UK internet traffic to online video sites rose by 178% year on year in February 2008, while the top 25 video sites in the country accounted for 2.22% of all UK site visits. [Source: Hitwise via eMarketer, April 2008]

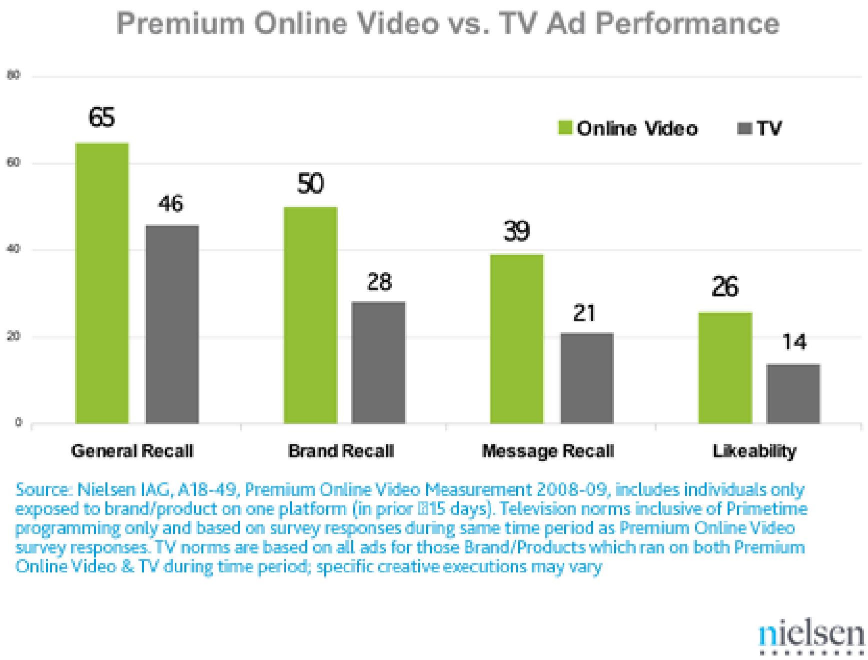


- Top 10 Video Streaming websites in the UK [Source: Hitwise, March 2008]

Rank	Website	Domain	Market Share*
1	YouTube	www.youtube.com	55.35%
2	YouTube UK	uk.youtube.com	13.96%
3	BBC iPlayer	www.bbc.co.uk/iplayer	5.66%
4	MySpaceTV	www.myspacetv.com	5.49%
5	Google Video	video.google.com	3.25%
6	Google Video UK	video.google.co.uk	1.52%
7	Daily Motion	www.dailymotion.com	1.42%
8	MetaCafe	www.metacafe.com	1.27%
9	Vuze	www.vuze.com	1.16%
10	Tudou.com	www.tudou.com	1.10%

International

- Online Video: approximately 70% of global online consumers watch online video; but North Americans and Europeans lag in adoption. [Source: How we watch: the global state of video consumption, Nielsen, July 2010]
  - 11% of global consumers have adopted mobile video
  - 11% of consumers have (or plan to) purchased tablet computers
  - Asia-Pacific consumers 45% 'more likely' than other consumers to watch mobile video
  - Latin American consumers are most interested in television with Internet access
- More than half of global online consumers watch online video in the workplace. [Source: How we watch: the global state of video consumption, Nielsen, July 2010]
- Online video ads have a 65% general recall compared to 46% for TV ads. Brand recall online is also higher at 50%, compared to TV's 28%. Message online recall is 39%, compared to TV's 21%. Likability is at 26% online, compared to TV's 14%. Consistently, online ads had more impact on consumers. [Source: Nielsen video study, via Econsultancy blog, April 2010]



- 80% of company respondents plan to use video emails in 2010. Meanwhile, only 15.7% of respondents used video in email campaigns during 2009. [Source: 2010 Email Marketing Trends Survey, Implix, February 2010]
- Over 65% of respondents believe that video email marketing can have a 'moderate' or 'significant' influence on conversion rates. And almost 64% of marketers who have already used video marketing messages think it can significantly increase conversions. [Source: 2010 Email Marketing Trends Survey, Implix, February 2010]
  - Meanwhile, a study by Implix last year found that video increased email marketing click-through rates by 96.38%.
- 67% of marketing survey respondents are planning video marketing initiatives. [Source: 2010 Marketing Survey, Datran Media, March 2010]
- Video viewing on laptops is much more likely to happen at home; 60% of people who view laptop video say they watch on that device exclusively at home, compared to 38% for iPod viewers and 31% for cell phones viewers. [Source: Knowledge Networks, October 2009]
- A Yahoo study showed spikes in online video consumption among men, women, students and full-time employees during the hours of 12 pm - 3 pm and then again between 9 pm - 1 am.

The lowest was around dinnertime from 6 pm - 9 pm. [Source: Yahoo, August 2009]

- By 2013, the sum of all forms of video (TV, VoD, internet video, and P2P) will exceed 90% of global consumer IP traffic. [Source: Cisco, June 2009]

United States

- Online video consumption is up 16% from last year with approximately 44% of online video consumed at the workplace. [Source: Three Screen Report, Nielsen, June 2010]
- The top video ad networks in terms of their actual reach delivered were: Joost Video Network (by Adconion Media Group) with 36.6% penetration of online video viewers, BrightRoll Video Network with 19.5%, and BBE with 18.5%. [Source: comScore, May 2010]
- 83.5% of the total U.S. Internet audience viewed online video. [Source: comScore, May 2010]
- The average Hulu viewer watched 24.7 videos, totalling 2.5 hours of video per viewer. [Source: comScore, May 2010]
- The duration of the average online video was 4.4 minutes. [Source: comScore, May 2010]
- Top U.S. online video ad networks [Source: comScore, May 2010]

Top U.S. Online Video Ad Networks by Potential Reach of Unique Viewers April 2010 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Unique Viewers (000)**	**Viewer Penetration**
Total Internet : Total Audience	*177,840*	*100.0*
Tremor Media - Potential Reach	92,601	52.1
ScanScout Network - Potential Reach	80,723	45.4
Advertising.com Video Network - Potential Reach	78,390	44.1
YuMe Video Network - Potential Reach	76,762	43.2
BBE - Potential Reach	69,770	39.2
Adconion Video Network - Potential Reach	67,688	38.1
Break Media Network - Potential Reach	67,391	37.9
SpotXchange Video Ad Network - Potential Reach	67,310	37.8
TidalTV - Potential Reach	65,698	36.9
BrightRoll Video Network - Potential Reach	59,229	33.3

- Top 10 video content properties [Source: comScore, May 2010]

Top U.S. Online Video Content Properties* by Videos Viewed April 2010 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (000)**	**Share of Videos (%)**
Total Internet : Total Audience	*30,317,131*	*100.0*
Google Sites	13,087,462	43.2

Hulu	958,176	3.2
Microsoft Sites	643,711	2.1
Viacom Digital	383,776	1.3
Yahoo! Sites	370,947	1.2
Vevo	331,730	1.1
Fox Interactive Media	320,372	1.1
CBS Interactive	316,930	1.0
Turner Network	304,729	1.0
AOL LLC	237,356	0.8

**Rankings based on video content sites; excludes video server networks. Online video includes both streaming and progressive download video.*

- US Internet users watched 31.2 billion videos in March, with Google Sites ranking as the top video property with 13.1 billion videos, representing 41.8% of all videos viewed online. [Source: Online Video Rankings, comScore, April 2010]
  - Hulu ranked second with 1.1 billion videos, or 3.4% of all online videos viewed.
  - Microsoft Sites ranked third with 655 million (2.1%), followed by Yahoo! Sites with 478 million (1.5%).

Top U.S. Online Video Content Properties* by Videos Viewed March 2010 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (000)**	**Share of Videos (%)**
Total Internet : Total Audience	*31,241,101*	*100.0*
Google Sites	13,056,042	41.8
Hulu	1,070,460	3.4
Microsoft Sites	655,068	2.1
Yahoo! Sites	477,887	1.5
CBS Interactive	457,261	1.5
Viacom Digital	370,179	1.2
Vevo	331,144	1.1
Turner Network	302,626	1.0
Fox Interactive Media	300,392	1.0
AOL LLC	280,328	0.9

*Rankings based on video content sites; excludes video server networks. Online video includes both streaming and progressive download video.

- Top US Online Video Content Properties
  [Source: Online Video Rankings, comScore, April 2010]

Top U.S. Online Video Content Properties* by Unique Viewers **March 2010** **Total U.S. – Home/Work/University Locations** **Source: comScore Video Metrix**		
Property	**Unique Viewers (000)**	**Average Videos per Viewer**
Total Internet : Total Audience	*180,241*	*173.3*
Google Sites	136,002	96.0
Yahoo! Sites	56,245	8.5
CBS Interactive	46,747	9.8
Microsoft Sites	42,724	15.3
Fox Interactive Media	42,487	7.1
FACEBOOK.COM	40,639	5.5
Hulu	40,017	26.7
Vevo	37,527	8.8
Viacom Digital	37,524	9.9
AOL LLC	32,405	8.7

*Rankings based on video content sites; excludes video server networks. Online video includes both streaming and progressive download video.

- Top Video Ad Networks by Potential Reach
  [Source: Online Video Rankings, comScore, April 2010]

Top US Online Video Ad Networks by Potential Reach of Unique Viewers **March 2010** **Total US – Home/Work/University Locations** **Source: comScore Video Metrix**		
Property	**Unique Viewers (000)**	**Viewer Penetration**
Total Internet : Total Audience	*180,241*	*100.0*
Tremor Media - Potential Reach	96,459	53.5
Adconion Video Network - Potential Reach	81,552	45.2
Advertising.com Video Network - Potential Reach	80,815	44.8
YuMe Video Network - Potential Reach	80,802	44.8
ScanScout Network - Potential Reach	79,924	44.3
BBE - Potential Reach	75,837	42.1
SpotXchange Video Ad Network - Potential Reach	69,392	38.5

TidalTV - Potential Reach	67,039	37.2
Break Media Network - Potential Reach	66,724	37.0
BrightRoll Video Network - Potential Reach	64,379	35.7

- UBS predicts 77% of US online video revenue will be from paid viewing in 2012 [Source: eMarketer, December 2009]
- Unique viewers of online video in the US: 138.4m (Up 11.4% from 2008) [Source: Nielsen, December 2009]
- Total online video streams viewed monthly is in excess of 11bn (up 17% from 2008) [Source: Nielsen, December 2009]
- Average time spent viewing online video, per viewer monthly is 200.1 minutes (up 12.5% from 2008) [Source: Nielsen, December 2009]
- 161m U.S. Internet users watched online video during the month of August 2009, the largest audience ever recorded. [Source: comScore, September 2009]
- The number of video streams watched by US viewers increased by 24.8% year-on-year to September 2009. The average time per viewer also increased by 24.8% over the same time period. [Source: Nielsen, October 2009]
- Top Online Brands ranked by Video Streams [Source: Nielsen, October 2009]

Top Online Brands ranked by Video Streams for September 2009 (U.S.)

RANK	Video Brand	Total Streams (000)	Unique Viewers (000)
1	YouTube	6,688,367	106,180
2	Hulu	437,407	13,519
3	Yahoo!	228,494	30,084
4	MSN/WindowsLive/Bing	180,104	18,109
5	Fox Interactive Media	139,634	14,342
6	Nickelodeon Kids and Family Network	127,654	5,303
7	Turner Sports and Entertainment Digital Network	123,665	6,062
8	MTV Networks Music	116,839	9,647
9	ESPN Digital Network	114,652	9,299
10	Facebook	110,418	23,161

Source: The Nielsen Company

- Nearly one-quarter (23%) of those surveyed in 2009 (aged 13-54 with home broadband access in the US) say they own a video iPod, compared to just 5% in 2006, making this device a new media channel of interest. [Source: Knowledge Networks, October 2009]
- A typical laptop viewing session is 33 minutes long, versus 23 minutes for a video iPod and 15 minutes for a cell phone with video service. [Source: Knowledge Networks, October 2009]
- 78.6% of the total US internet audience viewed online video in April 2009. [Source: comScore, June 2009]
- US internet users viewed 16.8bn online videos during the month, representing an increase of 16% versus March. [Source: comScore, June 2009]
- The duration of the average online video was 3.5 minutes. [Source: comScore, June 2009]
- The average online video viewer watched 385 minutes of video, or 6.4 hours. [Source: comScore, June 2009]

- Top US Online Video Properties by Videos Viewed, April 2009 [Source: comScore Video Metrix, June 2009]

Top U.S. Online Video Properties* by Videos Viewed April 2009 Total U.S. – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (000)**	**Share (%) of Videos**
Total Internet	*16,785,432*	*100.0*
Google Sites	6,831,957	40.7
Fox Interactive Media	512,872	3.1
Hulu	396,953	2.4
Yahoo! Sites	355,231	2.1
Viacom Digital	315,177	1.9
Microsoft Sites	288,301	1.7
Turner Network	272,709	1.6
CBS Interactive	202,810	1.2
Disney Online	132,212	0.8
AOL LLC	121,431	0.7

- 77.8% of the total US internet audience viewed online video. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- With 72% of US web users watching clips on the net, online video outstrips both blogging and social networking and is now the leading social media platform. [Source: Trendstream, May 2009]
- Online video is the fastest growing media platform in history. In one week in January 2009, 97 million Americans viewed a clip online, as many as are tuning into any major network. [Source: Trendstream, May 2009]
- In-Stat forecasts that by 2013 the number of US broadband households watching Web-to-TV content will grow to 24 million, generating $2.9bn in revenue from streaming services. [Source: In-Stat, May 2009]
- The average online video viewer watched 327 minutes of video, or nearly 5.5 hours. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- The duration of the average online video was 3.4 minutes. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- 82% of 16 & 17 year olds watched video online, compared with 65% of those aged 55-64. [Source: Trendstream, May 2009]
- Users in the USA viewed 14.5bn videos online in March 2009, an 11% increase over February. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- Hulu broke into the top-three most watched video sites in March 2009, with 380 million videos viewed, thus capturing 2.6% of the US market. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- Google sites remain the top video destinations in the country, with 5.9bn videos viewed (40.9% market share). In March 2009, YouTube accounted for over 99% of all Google videos viewed. [Source: comScore Video Metrix via Econsultancy Blog, April 2009]
- Google had over 100m online video viewers in March 2009. Fox Interactive ranked second with 55.2m viewers, followed by Yahoo! Sites (42.5m), and Hulu (41.6m). [Source: comScore Video Metrix via Econsultancy Blog, April 2009]

- 29% of US 25- to-34 year olds with game consoles use the devices to watch streaming video off the Internet. [Source: In-Stat, May 2009]
- In March 2009, there were 130,075,000 unique visitors in the US to video streaming/sharing sites. [Source: Nielsen Online via Marketing Charts, April 2009]
- The average viewer in the US spent 190 minutes watching videos online in March 2009. [Source: Nielsen Online via Marketing Charts, April 2009]

Top Online Brands ranked by Video Streams, US, March 2009
[Source: Nielsen Online via Marketing Charts, April 2009]

Video Brand	Total Streams (000)	Unique Viewers (000)
YouTube	5,479,609	89,407
Hulu	348,520	8,865
Yahoo!	231,795	24,761
Fox Interactive Media	207,528	14,719
Nickelodeon Kids And Family Network	196,160	6,391
ABC.com	176,931	6,881
MSN / Windows Live	168,907	12,076
Turner Sports And Entertainment Digital Network	137,621	5,822
MTV Networks Music	123,888	6,337
CNN Digital Network	103,453	9,021

- Hulu is the 4th biggest video streamer in the US according to comScore, and the 2nd according to Nielsen. [Source: NewTeeVee using data from comScore and Nielsen, March 2009]
- comScore reports that Hulu grew its number of viewers 42% and its number of streams 33% in February 2009. [Source: comScore via NewTeeVee, March 2009]
- Hulu is second only to YouTube by number of minutes per viewer, with 64.5 minutes per viewer. [Source: comScore via NewTeeVee, March 2009]

- US Streaming Video Market Overview [Source: comScore via NewTeeVee, February 2009]

February comScore VideoMetrix			
US Internet Property Ranking*	Overall Streams (000s)	Unique Viewers (000s)	Minutes Per Viewer
Total Internet Audience	13,072,164	145,177	312.0
1. Google Sites	5,348,579	99,395	134.0
2. Fox Interactive Media	462,620	53,794	11.3
3. Yahoo! Sites	353,489	41,679	15.8
4. Hulu (hybrid)	332,504	34,731	64.5
5. Microsoft Sites (hybrid)	259,002	28,490	17.9
6. Viacom Digital	248,103	22,051	17.4
7. Turner Network	169,486	20,119	17.3
8. AOL LLC	117,119	22,778	6.7
9. Disney Online	116,104	12,699	8.2
10.CBS Interactive (hybrid)	111,762	24,574	16.0
* Rankings based on video streams			

- 94% of US adults said they prefer watching programming on a TV set rather than online. [Source: Nielsen Research, July 2008]
  – A third of broadband users in the US have watched a TV show online.

Top US Online Video Properties* by Videos Viewed May 2008 Total US – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (000)**	**Share (%) of Videos**
Total Internet	*12,086,273*	*100%*
Google Sites	4,205,700	34.8%
Fox Interactive Media	778,168	6.4%
Yahoo! Sites	346,825	2.9%
Microsoft Sites	245,899	2.0%
Viacom Digital	206,047	1.7%
Time Warner – Excl AOL	145,113	1.2%
ABC.COM	126,589	1.0%
Disney Online	107,876	0.9%
AOL LLC	104,681	0.9%
Hulu.com	88,284	0.7%

** Rankings based on video content sites; excludes video server networks. Online video includes both streaming and progressive download video.*

- The number of online videos viewed in the US rose by 13% in March to 11.5bn. [Source: comScore, May 2008]
  - 73.7% of the total US online audience watched online video.
  - 84.8 million viewers watched 4.3bn videos on YouTube.com (50.4 videos per viewer).
  - 47.7m viewers watched 400m videos on MySpace.com (8.4 videos per viewer).
  - The average online video duration was 2.8 minutes.
  - The average online video viewer watched 235 minutes of video.

Top US Online Video Properties* by Videos Viewed March 2008 Total US – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (000)**	**Share (%) of Vide**
Total internet	*11,476,886*	*100.0%*
Google Sites	4,358,306	38.0%
Fox Interactive Media	477,621	4.2%
Yahoo! Sites	328,087	2.9%
Viacom Digital	249,285	2.2%
Microsoft Sites	245,453	2.1%
Time Warner - Excl. AOL	159,009	1.4%
Disney Online	108,055	0.9%
ABC.COM	100,051	0.9%
AOL LLC	100,044	0.9%
ESPN	89,760	0.8%

- US internet users viewed more than 10bn online videos in February, 3% more than January, and 66% more than the same month in 2007. [Source: comScore, April 2008]
  - Google sites controlled 35.4% of the online video market, ahead of Fox Interactive with 5.8%.
  - Almost 135m US internet users spent an average of 204 minutes per person viewing online video in February 2008.
- More than 75% of US internet users watched a video online in November 2007, an average of 3.25 hours per person. [Source: comScore via MarketingVOX, Jan 2008]
  - 74.5m people viewed 2.9bn videos on YouTube.com (39 videos per viewer).
  - 43.2 m people viewed 389 million videos on MySpace.com (9 videos per viewer).

Top US Online Video Properties* by Videos Viewed November 2007 Total US – Home/Work/University Locations Source: comScore Video Metrix		
Property	**Videos (MM)**	**Share (%) of Vide**
Total internet	*9,491*	*100.0%*
Google Sites	2,966	31.3%
Fox Interactive Media	419	4.4%
Yahoo! Sites	328	3.5%
Viacom Digital	245	2.6%
Time Warner Network	184	1.9%
Microsoft Sites	181	1.9%
Disney Online	96	1.0%
ABC.COM	88	0.9%
ESPN	87	0.9%
Break	47	0.5%

Top US Online Video Properties* by Videos Viewed July 2007 Source: comScore Video Metrix		
Property	**Videos (MM)**	**Share (%) of Vide**
Total Internet	*9,077*	*100.0%*
Google Sites	2,454	27.0%
Yahoo! Sites	390	4.3%
Fox Interactive Media	298	3.3%
Viacom Digital	281	3.1%
Disney Online	182	2.0%
Time Warner Network	181	2.0%
Microsoft Sites	149	1.6%
ESPN	75	0.8%
Veoh.com	53	0.6%
Comcast Corporation	51	0.6%

- More than half of all US internet users watch and download online video. About three-quarters of those viewing prefer ad-supported content to be paid. [AP/AOL, September 2006]
  - 54% of US web users watch clips and full-length video.
  - 32% of those watching online video say they watch more online video than they did a year ago.

2.2. Video On Demand / Catch Up TV

United Kingdom

- VOD will generate £200m a year in direct revenue and another £100m a year in advertising by 2013. [Source: Enders Analysis via paidContent, October 2009]
- The majority of consumers want to be able to watch online content through their TVs. While 17% already can do this, a further 58% say they would like to be able to do this. [Source: Entertainment Media Research via Econsultancy Blog, June 2009]
- 46% said they would be likely to download more content to their PC if they could watch it on their TV. But the perceived difficulty of linking PCs to TVs is a problem; 49% said they didn't know how to do this, or considered it to be too difficult. [Source: Entertainment Media Research via Econsultancy Blog, June 2009]
- The BBC's iPlayer online catch up TV service received 100m requests to view programmes between December 2007 and June 2008. [Source: BBC via Econsultancy blog, July 2008]
  - It averaged 700,000 requests to view programmes per day in May 2008.
- In February 2008, PlusNet accounted for 5% of their ISP network traffic to BBC iPlayer. [Source: Current Analysis, May 2008]
- Current Analysis states "there is also evidence to suggest that, after a strong start, iPlayer traffic is starting to plateau." [Source: Current Analysis, May 2008]

United States

- When cross-platform viewers were asked about their motivations for consuming a portion of their TV content online, freedom in time and space emerged as primary motivators [Source: U.S. Online TV Viewership, comScore, March 2010]
  - 75 % of these viewers selected "online" over "TV" because they were able to watch the show wherever they wanted.
  - 74 % selected online because they were able to watch the show on their own time.
  - They also preferred online TV viewing for the ability to stop and play shows when they wanted (70 %) and less interference from commercials (67 %).

Cross-Platform TV Viewer Media Preferences
Q: "For each attribute below, please select whether Online or TV is better."
December 2009
Total U.S., Cross-Platform TV Viewers, n=535
Source: comScore, Inc.

Response	Share of Cross-Platform Viewers	
	Online	TV
Watch the show wherever I want	75%	25%
Watch the show on my own time	74%	24%

Ability to stop and play show when I want	70%	30%
Less interference from commercials	67%	33%
Overall convenience	61%	39%
Overall viewing experience	32%	68%
View show as soon as it's released	31%	69%
Sound quality	28%	72%
Picture quality	25%	75%

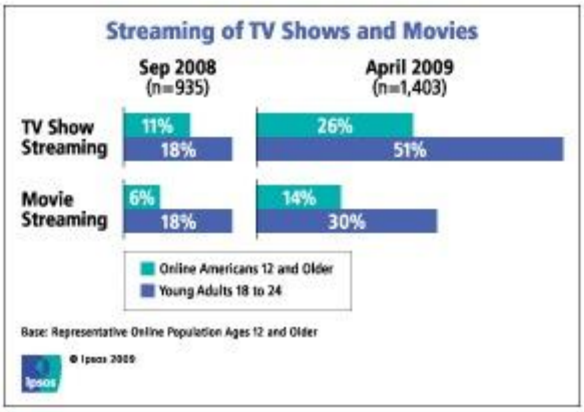
- When asked specifically why they watched TV episodes online, the most frequently cited reason among cross-platform viewers was that they had missed an episode on TV (71 %), followed by convenience (57 %) and fewer ads (38 %).

- TV Viewing Differences by Age Segment
[Source: U.S. Online TV Viewership, comScore, March 2010]
  - Time shifting of TV viewing is most prevalent among younger TV viewers, with only 35% of viewers aged 18-24 indicating they watched episodes live, 42 % saying they watched the programming at a different time within one week of the original air date and 23% saying that they watched more than one week after the original air date. 25-34 year olds exhibited fairly similar time-shifting behavior to 18-24 year olds, while older age segments exhibited the least amount of time-shifting behavior.

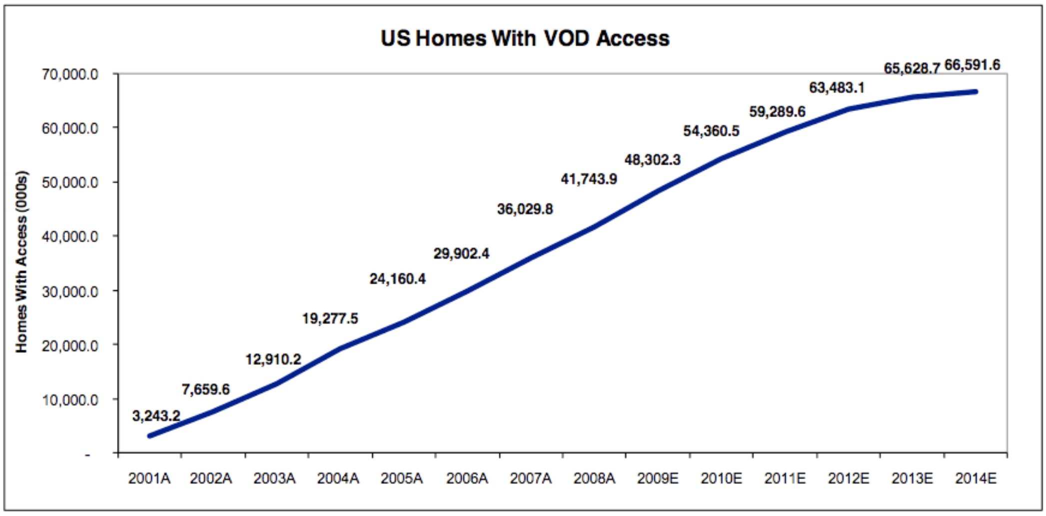
TV Time-Shifting by Age Segment
December 2009
Total U.S., TV Viewers, n=1,825
Source: comScore, Inc.

Age Segment	Share of Viewers			
	Watch Live	Non-Live Viewing		
		Same Day Time Shifted - 3 Days After Airing	4-7 Days After Airing	More than 7 Days After Airing
18-24 Year Olds	35%	22%	20%	23%
25-34 Year Olds	35%	23%	24%	18%
35-49 Year Olds	46%	21%	17%	16%
50-64 Year Olds	55%	16%	17%	11%
65+ Year Olds	57%	16%	14%	13%

- Six out of seven U.S. Internet users now view online video content, with YouTube and Hulu continuing to experience rapid increase in viewership. [Source: The 2009 U.S. Digital Year in Review, comScore, February 2010]
- 924 million videos were viewed per month (on average) on Hulu in the US during 2009 [Source: Pingdom, January 2010]
- In the past 30 days, 26% of online Americans have streamed a full-length TV show and 14% have streamed a full-length movie. This is more than two times the levels measured in September 2008. [Source: Ipsos MediaCT, August 2009]



- US households with VOD (Video on demand) [Source: Magna Insights, June 2009]



- Some 56% of 18-34-year-old adults use DVRs, the internet, video on demand and MP3 players to follow their favourite TV shows, compared with 21% for viewers over age 55, according to a Nielsen study. [Source: Nielsen Media Research via Marketing Charts, November 2007]

Table 1

When you miss an episode how do you get caught up (favorite broadcast series)?*

	Total	Male	Female	Age 18-34	Age 35-54	Age 55+
Sample Size: N=	1,599	659	940	410	764	395
Watch it using your DVR	29%	32%	27%	37%	30%	18%
Watch a rerun	26%	26%	26%	19%	26%	35%
I don't do anything. I wait for the next episode	13%	13%	12%	5%	13%	20%
Watch it on the internet	7%	7%	7%	16%	5%	2%
Watch it using your VCR	7%	5%	9%	4%	9%	8%
Ask a friend what you missed	6%	4%	7%	6%	6%	7%
Wait for it to come out on DVD	5%	5%	4%	7%	5%	3%
Read Summary	2%	0%	2%	0%	2%	2%
Watch is using VOD service	1%	1%	1%	1%	1%	1%
Download and watch on MP3	1%	2%	1%	2%	1%	0%
Other	4%	5%	4%	3%	4%	6%

* Results of in-person study conducted by Nielsen in October, 2007 with more than 1,500 adults at the CBS Television City research facility in Las Vegas

Table 2

When You Watch Full Episodes Streamed on the Internet, What Sites Do You Go To?*

	Total	Male	Female	Age 18-34	Age 35-54	Age 55-99
Sample Size	395	180	215	161	176	45
ABC.com	50%	43%	56%	52%	52%	36%
NBC.com	41%	43%	38%	50%	37%	31%
CBS.com	37%	38%	36%	32%	43%	33%
FOX.com	24%	31%	18%	24%	24%	27%
YouTube	17%	20%	14%	25%	10%	4%
iTunes	15%	17%	13%	20%	12%	4%
CWTV.com	8%	8%	7%	10%	5%	2%
BitTorrent	6%	8%	4%	10%	3%	0%
PBS.org	3%	4%	2%	2%	4%	4%
Other	15%	18%	13%	16%	12%	24%

* Results of in-person study conducted by Nielsen in October, 2007 with more than 1,500 adults at the CBS Television City research facility in Las Vegas

2.3. User Generated Video & Video Sharing

International

- YouTube serves some one billion videos each day [Source: Pingdom, January 2010]
- Of those who share videos they watch with others, the majority (72%) distribute video content to fewer than three people, while 11% share videos with networks of at least six people. [Source: Trendstream, May 2009]

United States

- In January 2009, 39% of respondents shared a clip online and a further 31.5% contributed to the burgeoning mass of online media by uploading a clip themselves. [Source: Trendstream, May 2009]
- User-generated video made up 47% of the total online video market in the US in 2006. [Source: Screen Digest, January 2007]
  - By 2010 more than half (55%) of all the video content consumed online in the US will be user generated, representing 44 billion video streams.

3. Audio

3.1. Market Size & Growth Trends

United Kingdom

- A report from the Digital Media Association (DiMA) suggests that the use of online music services leads to a widening of listening habits and an increase in listening and exploring new music. [Source: DiMA, January 2007]
  - 60% of those surveyed were listening to more music since they started using an online service.
  - About 25% reported having discovered a lot of new artists, while more than 60% of those surveyed say they have discovered some new artists.
  - Half of digital music consumers are spending more than $200 per year on music, and nearly 30% are spending more than $300.

3.2. Downloading music

United Kingdom

- The number of people downloading music online legally has increased this year: 51% of consumers had downloaded songs, compared with 47% in 2007. [Source: Entertainment Media Research Digital Music Survey, Oct 2008]
  - The number of illegal downloaders in the UK has declined by 10% since 2007, deterred by the threat of action against them by ISPs and the availability of free legal music.
  - 72% of illegal downloaders say they would cease if contacted by their ISP
- The number of internet users in the UK who regularly buy music downloads dropped to 14% in 2007, compared with 16% in 2006. [Source: The Leading Question via NMA, May 2008]
- Global digital music sales totalled an estimated $3bn (£1.5bn) in 2007, a roughly 40% increase on $2.1bn in 2006. [Source: IFPI Digital Music Report, Jan 2008]
  - Single track downloads grew by 53% to 1.7bn.
  - Digital sales now account for around 15% of the global music market, up from 11% in 2006 and zero in 2003.
  - In the world's biggest digital music market, the US, online and mobile sales now account for 30% of all revenues
  - Tens of billions of illegal files were swapped in 2007. The ratio of unlicensed tracks downloaded to legal tracks sold is about 20 to 1.

International

- The digital music business internationally grew by an estimated 25% to $3.7bn in total sales.[Source: IFPI Digital Music Report 2009]
  - Digital platforms now account for around 20% of recorded music sales, up from 15% in 2007.
  - Single track downloads, up 24%in 2008 to 1.4 billion worldwide, but digital albums also grew by 37%.
  - The US accounts for 50% of the global digital music market value.

- The UK saw the biggest increase in digital sales in the first half of 2008 with sales up by 45%. 110 million single tracks were downloaded in 2008, up 42% on 2007.
- Digital album sales rose by 65% to 10.3 million - 7.7% of the albums market

- eMusic has reported that 75% of the tracks in its catalogue were bought at least once in 2008. [Source: Hitwise, January 2009]
- A report from the Digital Media Association (DiMA) suggests that the use of online music services leads to a widening of listening habits and an increase in listening and exploring new music. [Source: DiMA, January 2007]
  - 60% of those surveyed were listening to more music since they started using an online service.
  - About 25% reported having discovered a lot of new artists, while more than 60% of those surveyed say they have discovered some new artists.
  - Half of digital music consumers are spending more than $200 per year on music, and nearly 30% are spending more than $300.

United States

- Real, the parent of online music subscription service Rhapsody, posted an 18% traffic decline. [Source: Internet Retailer based on Nielsen Online data, April 2009]
- In the American adult population alone, some 37% of internet users say they download music files online and 7% do so on a typical day. [Source: Pew internet And American Life Project, October 2008]
- 33m Americans aged 12+ listen to internet radio in an average week, up from 29m a year ago. [Source: Edison Media Research, March 2008]

3.3. Online Radio

United Kingdom

- The number of people who have listened to radio via the internet, (either live or listen-again services) had increased to 14.5 million by May 2008, up from 12.0 million six months earlier. And listening online was a weekly activity for 9.4 million people by May 2008, up from 8.1 million in November 2007) [Source: Ofcom, Aug 2008]
- 8.1m people in the UK listen to the radio via the internet, either live or through a 'listen again' service. [Source: RAJAR, Jan 2008]
- The number of people who have listened to radio via the internet, (either live or listen-again services) had increased to 14.5 million by May 2008, up from 12.0 million six months earlier. And listening online was a weekly activity for 9.4 million people by May 2008, up from 8.1 million in November 2007) [Source: Ofcom, Aug 2008]

International

- Real, the parent of online music subscription service Rhapsody, posted an 18% traffic decline. [Source: Internet Retailer based on Nielsen Online data, April 2009]
- Almost three-quarters of web users not currently listening to online radio are unlikely to take it up in the next 12 months. [Continental Research, May 2006]
  - 73% of more than 1,000 web users not currently tuning in to radio online have no interest in the service. Only 19% expressed an interest.

4. RSS

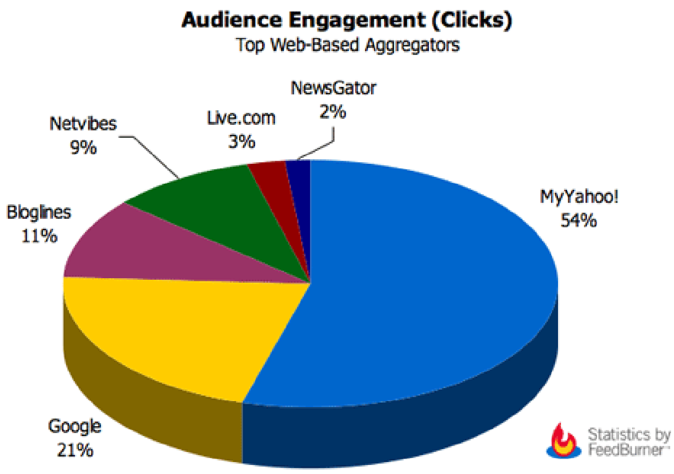
United Kingdom

- 6.6% of the UK online population use RSS feeds. [Harris Interactive/Guardian Unlimited, October 2006]

International

- Google searches related to RSS [Source: Google Trends, October 2009]

- Google searches related to RSS peaked in January 2006, but have been steadily declining ever since. By January 2009, search volume had halved. [Source: Pingdom using data from Google Insights For Search, January 2009]
- Audience Engagement (Clicks) from Web-Based Aggregators. [Source: FeedBurner, February 2007]



United States

- Only 2% of US employees subscribe to RSS feeds and only 9% know what such feeds are. Some 88% do not know what RSS is. [eMarketer/Workplace Print Media/MediaBuyerPlanner, August 2006]

5. Site Performance and User Technology

5.1. Site Speed and Availability

United Kingdom

- For the week from Christmas Day to New Year's Eve, nine of the 13 retailers studied by Keynote managed 100% availability; only HMV and Selfridges suffered from slow response times. [Source: Keynote, Jan 2009]
  - Performance and availability (Thursday 25/12/2008 — Wednesday 31/12/2008) :

Company	Average performance (s)	Availability (%)
Toys 'R' Us	**1.24**	**100.00**
House of Fraser	1.29	99.94
BHS	1.36	100.00
Tesco Direct	1.54	100.00
Play	1.88	100.00
Argos	1.90	100.00
Debenhams	1.95	100.00
John Lewis	2.03	100.00
Hamleys	2.24	100.00
Littlewoods	2.66	99.87
Amazon	2.73	100.00
Selfridges	4.72	99.87
HMV	5.42	98.79

International

- Two seconds is the new threshold in terms of an average online shopper's expectation for a web page to load. 40% of shoppers will wait no more than three seconds before abandoning a retail or travel site. [Source: Akamai, September 2009]
- Only 5 social networks managed an overall uptime of 99.9% or better: Facebook (99.92%), MySpace (99.94%), Classmates.com (99.95%), Xanga (99.95%) and Imeem (99.95%). [Source: Pingdom, February 2009]
- Web shoppers could access a top 50 retail site with a high broadband connection an average of 99.24% of the time, compared with an average of 99.81% for a low broadband connection and 81.63% for dial-up. [Source: Gomez Inc. via InternetRetailer, January 2008]

5.2. Domain names

- There has been an 18.6% increase in sales on Q4 2009 and the highest recorded number of domain names sold in a quarter. [Source: Quarterly Domain Market Study Q1 2010, Sedo, April 2010]
- In Q1 2010, 11,942 domain names changed hands, of which the most popular generic Top-Level Domain (gTLD) domain extension remained .com, making up 76% of all sales. [Source: Quarterly Domain Market Study Q1 2010, Sedo, April 2010]
- The frontrunner under the country code Top Level Domains (ccTLD) was .de, making up 38% of country specific extensions. Surprisingly, .eu (36%) was the second most traded ccTLD extension, followed by .co.uk in the third place at 13%. [Source: Quarterly Domain Market Study Q1 2010, Sedo, April 2010]

5.3. User Technology

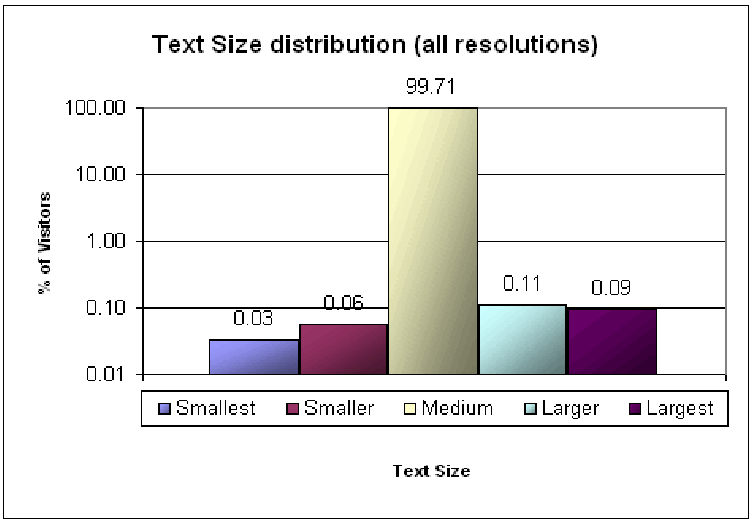
International

- Browsers and average screen resolution (Note that the values are mean averages, not mode. Also note that OSX users have not been included.) [Source: clickdensity.com, November 2006]

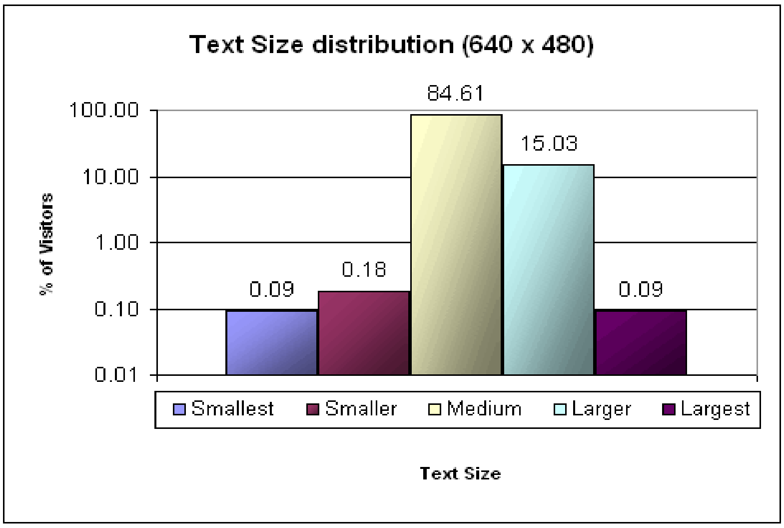
Browser	Avg. Screen Resolution
All Browsers	**1065 x 788**
Internet Explorer (all versions)	1052 x 780
Internet Explorer 7	1132 x 829
Firefox (all versions)	1146 x 838
Firefox 2	1223 x 893

Browser text size settings:

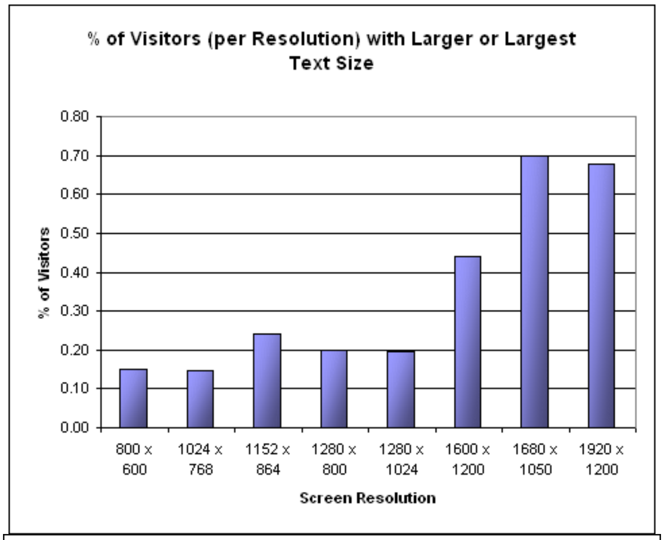
- The vast majority of internet users (99.7%) use default (Medium) text size settings.

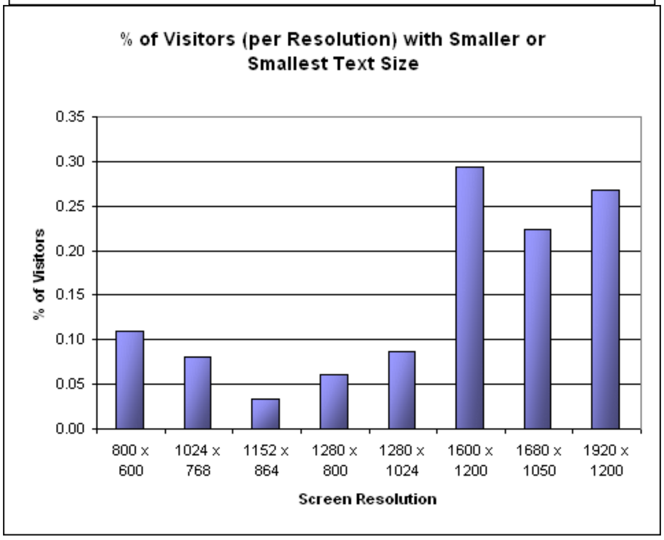


[Source: clickdensity.com, November 2006]



- Approximately twice as many visitors (0.2%) increase their text size than decrease their text size (0.1%). [Source: clickdensity.com, November 2006]
- Users with very low (640 x 480) or very high (larger than 1600 x 1200) screen resolutions are at least twice as likely to change their text size settings (compared to users with resolutions from 800 x 600 to 1280 x 1024). [Source: clickdensity.com, November 2006]

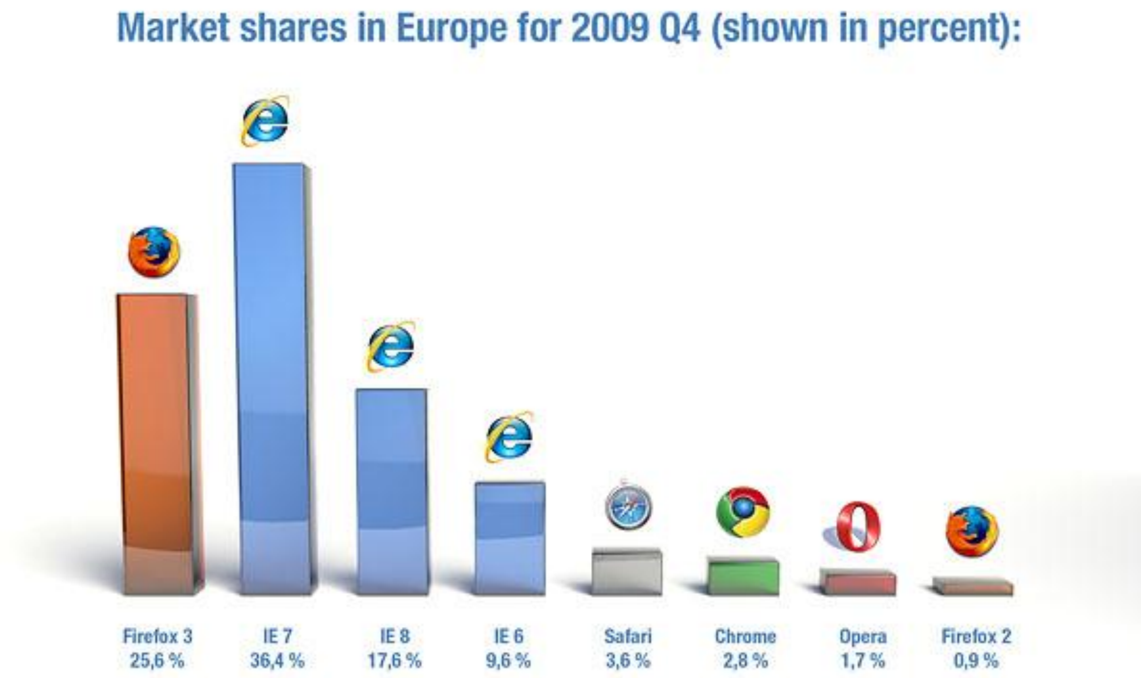




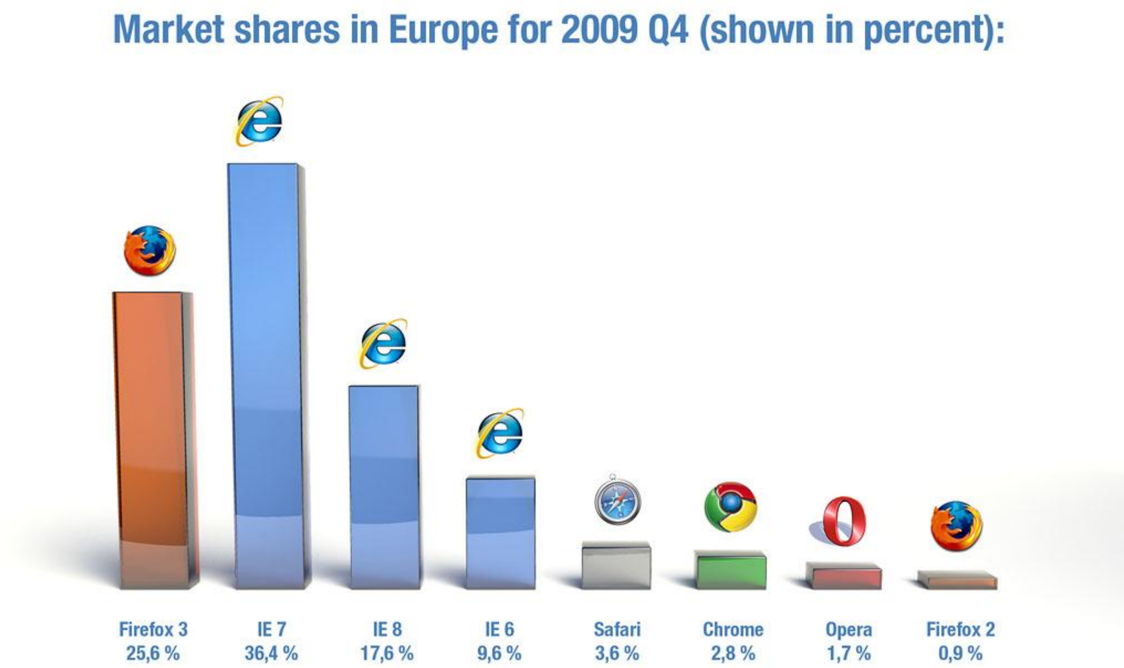
[Source: clickdensity Text Sizes Study, November 2006]

5.4. Desktop Browsers

International

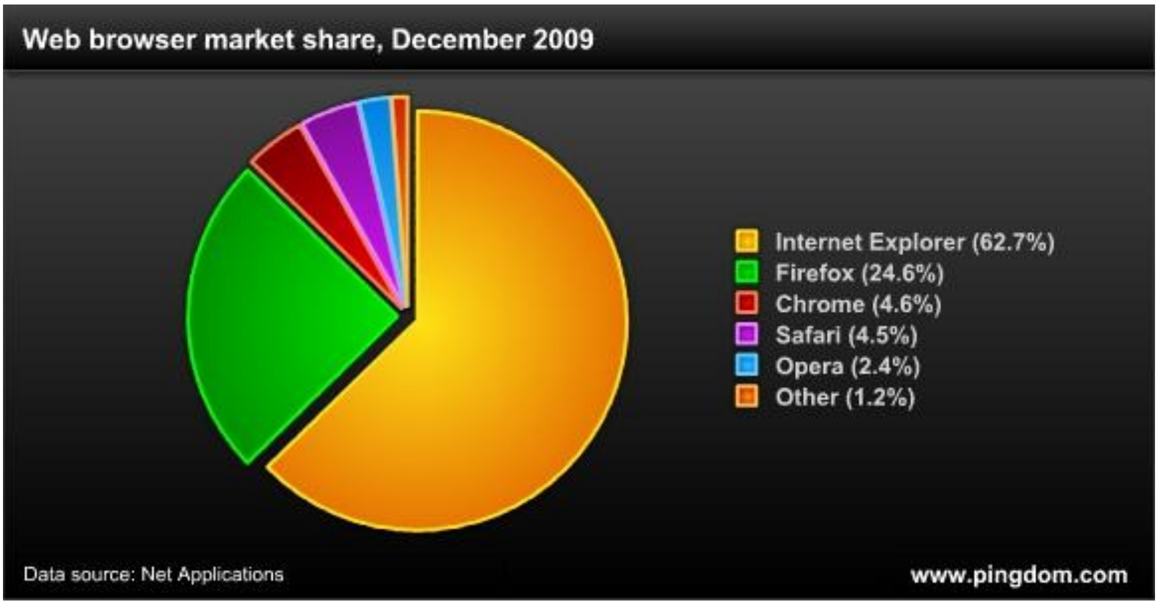


[Source: ADTECH, January 2010]



[Source: ADTECH, January 2010]

- Web browser market share



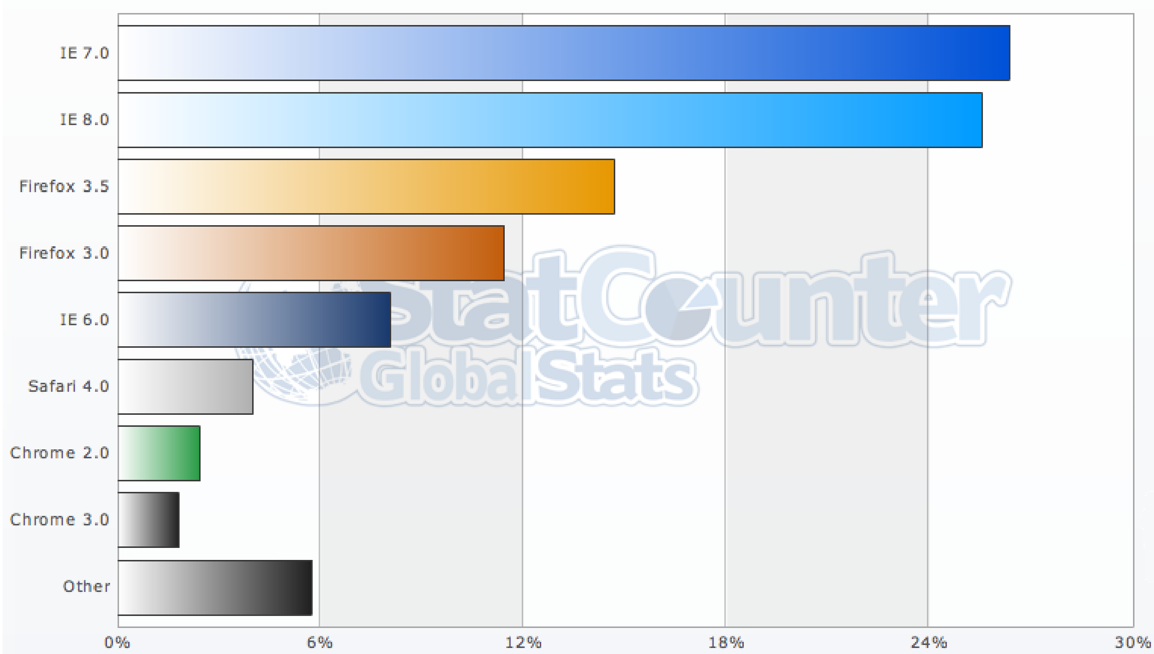
[Source: Pingdom, January 2010]

- Browser market share by month [Source: Net Applications, Oct 2009]

2009	IE8	IE7	IE6	Firefox	Chrome	Safari	Opera
September	16.84%	19.39%	24.42%	23.75%	3.17%	4.24%	2.19%
August	15.10%	21.10%	25.25%	22.98%	2.84%	4.07%	2.04%
July	12.46%	23.09%	27.21%	22.47%	2.59%	4.07%	1.97%
June	8.63%	27.26%	29.16%	22.43%	2.40%	3.79%	2.03%
May	6.85%	40.83%	16.94%	22.51%	1.80%	8.43%	0.72%
April	3.99%	44.51%	17.52%	22.48%	1.42%	8.21%	0.68%
March	1.83%	46.54%	18.36%	22.05%	1.23%	8.23%	0.70%
February	1.17%	47.32%	18.85%	21.77%	1.15%	8.02%	0.71%
January	0.92%	47.32%	19.21%	21.53%	1.12%	8.29%	0.70%
2008	**IE7**	**IE6**	**IE5**	**Firefox**	**Mozilla**	**Safari**	**Opera**
December	46.77%	20.46%	0.05%	21.34%	0.08%	7.93%	0.71%
November	47.39%	21.53%	0.05%	20.78%	0.08%	7.13%	0.71%
October	47.08%	23.47%	0.06%	19.97%	0.09%	6.57%	0.75%
September	46.35%	24.67%	0.06%	19.46%	0.09%	6.65%	0.69%
August	46.79%	25.17%	0.06%	19.73%	0.10%	6.37%	0.74%
July	47.10%	25.74%	0.07%	19.22%	0.08%	6.14%	0.69%
June	46.45%	26.38%	0.07%	19.03%	0.09%	6.31%	0.73%
May	26.50%	27.30%	0.70%	39.80%	0.70%	2.40%	1.50%
April	24.90%	28.90%	1.00%	39.10%	0.90%	2.20%	1.40%
March	23.30%	29.50%	1.10%	37.00%	1.10%	2.10%	1.40%
February	22.70%	30.70%	1.30%	36.50%	1.20%	2.00%	1.40%
January	21.20%	32.00%	1.50%	36.40%	1.30%	1.90%	1.40%
2007	**IE7**	**IE6**	**IE5**	**Fx**	**Moz**	**S**	**O**
December	21.00%	33.20%	1.70%	36.30%	1.40%	1.70%	1.40%
November	20.80%	33.60%	1.60%	36.30%	1.20%	1.80%	1.60%
October	20.70%	34.50%	1.50%	36.00%	1.30%	1.70%	1.60%
September	20.80%	34.90%	1.50%	35.40%	1.20%	1.60%	1.50%
August	20.50%	35.70%	1.50%	34.90%	1.30%	1.50%	1.70%
July	20.10%	36.90%	1.50%	34.50%	1.40%	1.50%	1.90%
June	19.70%	37.30%	1.50%	34.00%	1.40%	1.50%	1.80%
May	19.20%	38.10%	1.60%	33.70%	1.30%	1.50%	1.70%
April	19.10%	38.40%	1.70%	32.90%	1.30%	1.50%	1.60%
March	18.00%	38.70%	2.00%	31.80%	1.30%	1.60%	1.60%
February	16.40%	39.80%	2.50%	31.20%	1.40%	1.70%	1.50%
January	13.30%	42.30%	3.00%	31.00%	1.50%	1.70%	1.50%
2006	**IE7**	**IE6**	**IE5**	**Fx**	**Moz**	**N7/8**	**O**
November	7.10%	49.90%	3.60%	29.90%	2.50%	0.20%	1.50%
September	2.50%	55.60%	4.00%	27.30%	2.30%	0.40%	1.60%
July	1.90%	56.30%	4.20%	25.50%	2.30%	0.40%	1.40%
May	1.10%	57.40%	4.50%	25.70%	2.30%	0.30%	1.50%
March	0.60%	58.80%	5.30%	24.50%	2.40%	0.50%	1.50%
January	0.20%	60.30%	5.50%	25.00%	3.10%	0.50%	1.60%
2005	**IE6**	**IE5**	**Fx**	**Moz**	**N7**	**O8**	**O7**
November	62.70%	6.20%	23.60%	2.80%	0.40%	1.30%	0.20%
September	69.80%	5.70%	18.00%	2.50%	0.40%	1.00%	0.20%
July	67.90%	5.90%	19.80%	2.60%	0.50%	0.80%	0.40%
May	64.80%	6.80%	21.00%	3.10%	0.70%	0.70%	0.60%
March	63.60%	8.90%	18.90%	3.30%	1.00%	0.30%	1.60%
January	64.80%	9.70%	16.60%	3.40%	1.10%		1.90%

United Kingdom

- UK Browser Market Share by version. [Source: StatCounter, October 2009]



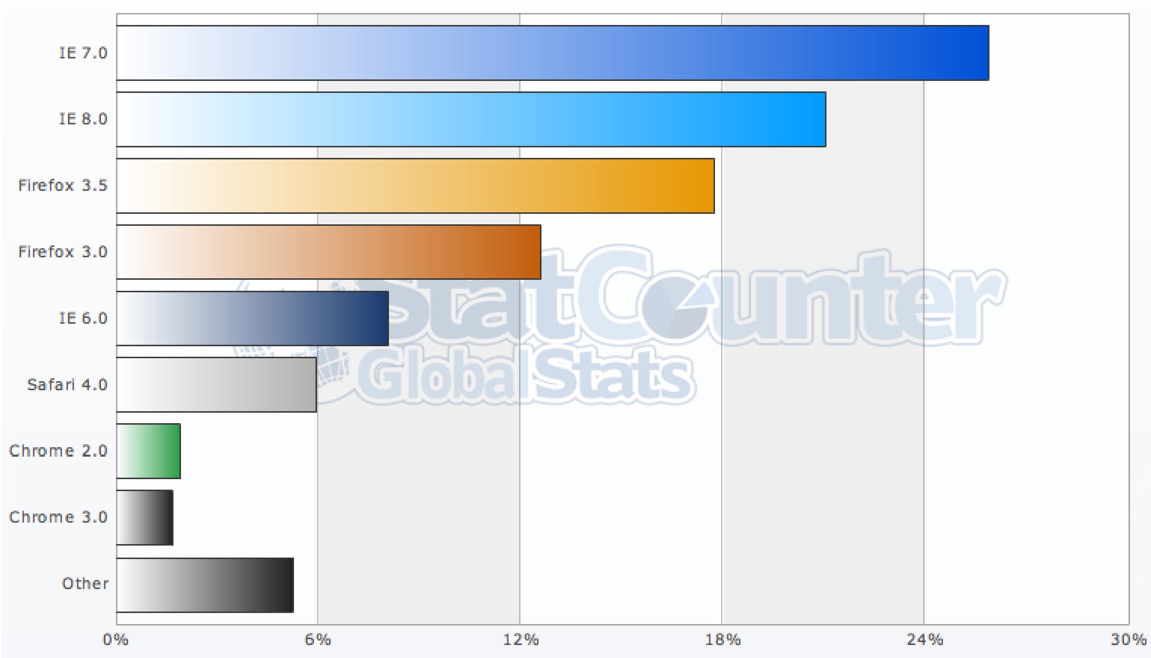
European Browser Market, 2009 [Source: ADTECH, April 2009]				
Browser	**January**	**February**	**March (first half)**	**March (second half)**
IE 7	51.1%	51.0%	50.7%	50.4%
IE 6	17.7%	17.2%	16.6%	16.2%
IE 8	0.6%	0.6%	0.6%	1.1%
Firefox 3	20.7%	21.9%	22.8%	23.0%
Firefox 2	3.0%	2.3%	2.1%	2.0%
Firefox 1	0.4%	0.3%	0.3%	0.3%
Chrome	0.8%	0.9%	0.9%	1.0%
Apple	2.4%	2.4%	2.6%	2.6%
Mozilla	1.2%	1.1%	1.1%	1.1%
Opera	1.4%	1.3%	1.3%	1.4%
iPhone	0.1%	0.2%	0.2%	0.2%

UK Browser Market, 2009 [Source: ADTECH, April 2009]		
Browser	**March (First Half)**	**March (Second Half)**
IE 7	49.7%	54.4%
IE 6	23.9%	18.4%
IE 8	1.1%	1.8%
Firefox 3	15.5%	15.7%
Firefox 2	1.4%	1.4%
Firefox 1	0.2%	0.2%

UK Browser Market, 2009 [Source: ADTECH, April 2009]		
Browser	**March (First Half)**	**March (Second Half)**
Chrome	1.4%	1.5%
Apple	1.5%	1.5%
Mozilla	3.5%	3.3%
Opera	0.8%	0.8%
iPhone	0.3%	0.3%

United States

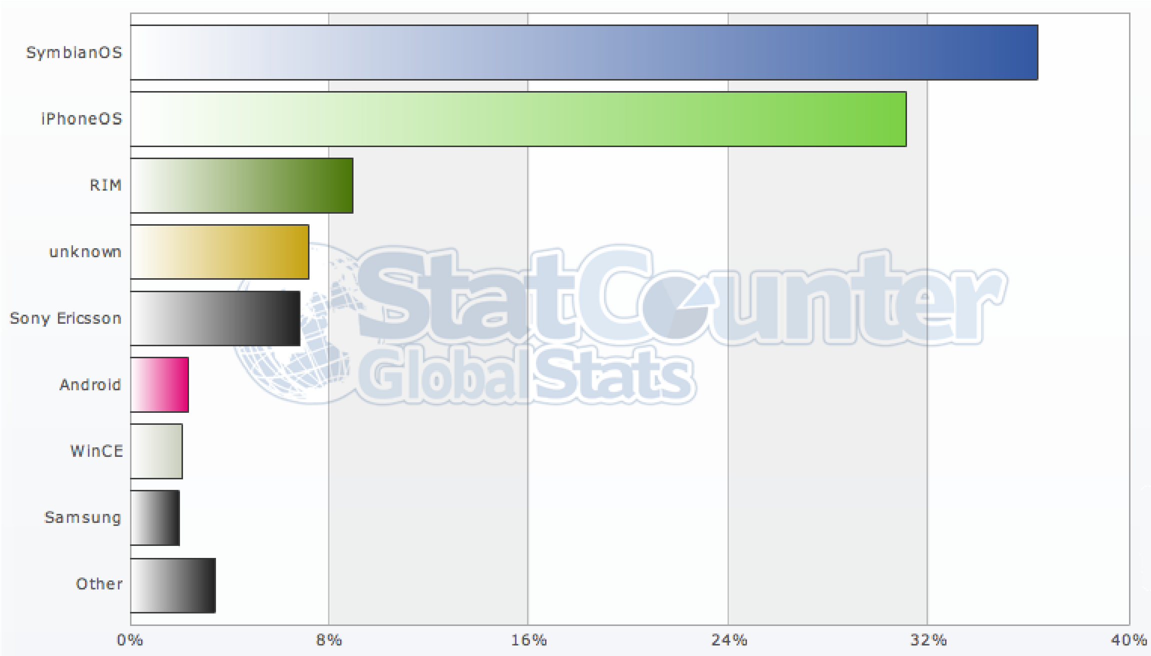
- US Browser Market Share by version. [Source: StatCounter, October 2009]



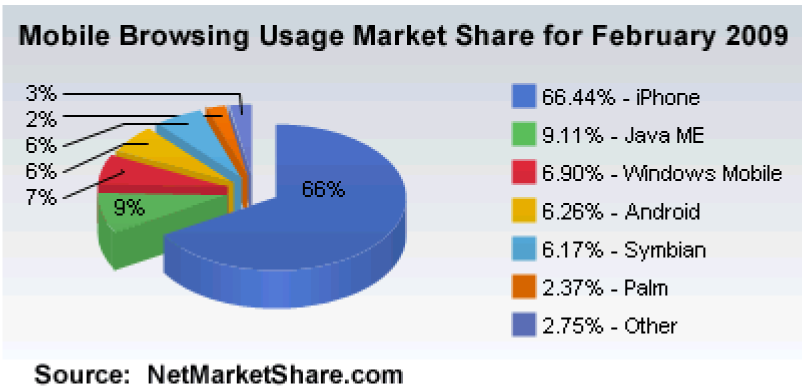
5.5. Mobile Browsers

International

StatCounter mobile web browser statistics show Symbian as the dominant OS for mobile web browsing – followed by Apple and RIM devices. Google's Android OS is a distant 6th. [Source: StatCounter, October 2009]



- Mobile web browser statistics show the iPhone as the dominant device for mobile web browsing – followed by Java devices, Windows Mobile / Android / Symbian with similar market share, and Palm trailing a distant 6th. [Source: Net Applications via Econsultancy Blog, March 2009]



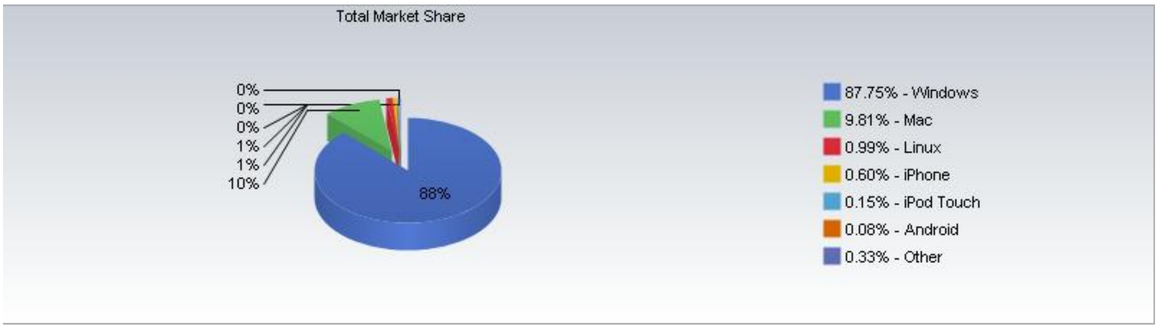
5.6. Pop-up blockers

- Pop-up advertising only accounted for 0.4% of all online advertising spend in 2008. The IAB predicts pop up advertisements will be virtually extinct by the end of the decade. [Source: IAB, April 2009]

5.7. Operating systems

International

- Windows XP is still the most popular operating system. Overall Windows market share is 93.66%; overall Mac market share is 5.12%. Linux use is steady at 0.95%, and iPhone use is now at 0.35%. [Source: Net Applications, October 2009]



- Fewer than half of the IT pros surveyed (42%) said their organizations planned to deploy Windows 7 within 12 to 24 months of release, 24% said they would wait 24 to 36 months, and 17% said they would wait more than 36 months to migrate to Windows 7. [Source: Dimensional Research via WebProNews, April 2009]

- Operating System market share. In June 2009, Net Applications revised their stats to weight them by the population of each country – the new stats reflect the very different usage patterns in China. [Source: Net Applications, October 2009]

2009	**Win7**	**Vista**	**WinXP**	**W2000**	**iPhone**	**Linux**	**Mac**
September	1.52%	18.62%	71.51%	0.85%	0.35%	0.95%	5.12%
August	1.18%	18.80%	71.79%	0.93%	0.33%	0.94%	4.87%
July	0.89%	17.90%	72.93%	0.97%	0.30%	1.05%	4.86%
June	0.75%	17.58%	73.62%	1.05%	0.27%	1.00%	4.70%
May	0.42%	24.35%	61.54%	1.06%	0.60%	0.99%	9.81%
April	0.24%	23.90%	62.21%	1.15%	0.55%	1.02%	9.73%
March	0.21%	23.42%	62.85%	1.24%	0.60%	0.90%	9.77%
February	0.18%	22.91%	63.53%	1.32%	0.59%	0.88%	9.61%
January	0.10%	22.48%	63.76%	1.37%	0.59%	0.83%	9.93%
2008	**WinXP**	**W2000**	**Win98**	**Vista**	**WinNT**	**Linux**	**Mac**
December	65.22%	1.47%	0.27%	21.12%	0.34%	0.85%	9.63%
November	66.31%	1.56%	0.29%	20.45%	0.77%	0.83%	8.87%
October	68.11%	1.72%	0.31%	19.29%	0.78%	0.71%	8.21%
September	68.67%	1.89%	0.34%	18.33%	0.80%	0.91%	8.23%
August	69.49%	1.93%	0.38%	17.85%	0.72%	0.93%	7.86%
July	70.64%	2.02%	0.41%	16.93%	0.71%	0.82%	7.76%
June	71.20%	2.11%	0.43%	16.14%	0.69%	0.80%	7.94%
May	74.00%	2.90%	0.30%	9.30%	1.80%	3.60%	4.70%
April	73.30%	3.30%	0.50%	8.80%	1.90%	3.70%	4.60%
March	72.70%	3.70%	0.60%	8.50%	1.90%	3.90%	4.40%
February	72.40%	4.00%	0.80%	7.80%	1.80%	3.80%	4.30%
January	73.60%	4.00%	0.80%	7.30%	1.90%	3.60%	4.40%
2007	**WinXP**	**W2000**	**Win98**	**Vista**	**W2003**	**Linux**	**Mac**
November	73.80%	5.10%	1.00%	6.30%	2.00%	3.30%	3.90%
September	74.30%	5.40%	0.90%	4.50%	2.00%	3.40%	3.90%
July	74.60%	6.00%	0.90%	3.60%	2.00%	3.40%	4.00%
May	75.00%	6.50%	0.90%	2.80%	1.90%	3.40%	3.90%
March	76.00%	7.20%	0.90%	1.90%	1.90%	3.40%	3.80%
January	76.10%	7.70%	1.00%	0.60%	1.90%	3.60%	3.80%
2006	**WinXP**	**W2000**	**Win98**	**WinNT**	**W2003**	**Linux**	**Mac**
November	74.90%	8.00%	1.00%	0.30%	1.90%	3.50%	3.60%
September	74.60%	9.20%	1.40%	0.30%	2.00%	3.50%	3.60%
July	74.30%	10.10%	1.50%	0.30%	2.00%	3.40%	3.60%
May	74.20%	10.70%	1.60%	0.20%	2.00%	3.40%	3.60%
March	72.90%	11.90%	2.00%	0.30%	1.80%	3.40%	3.50%
January	72.30%	13.10%	2.40%	0.30%	1.70%	3.30%	3.50%

5.8. JavaScript

International

- There are no absolute trends about the use of JavaScript. Some users have scripting turned off. Some browsers do not support scripting. [Source: W3 School, February 2009]

	JavaScript On	JavaScript Off
January 2008	95%	5%
January 2007	94%	6%
January 2006	90%	10%
January 2005	89%	11%
January 2004	92%	8%
January 2003	89%	11%
January 2002	88%	12%
January 2001	81%	19%
January 2000	80%	20%

5.9. Cookies

United Kingdom

- While cookies from many smaller networks escape the washing process, more prominent systems are targeted more heavily. [Ben Edelman/Clicks2Customers, September 2006]
  - Cookies from Advertising.com, aQuantive/Atlas, Casale Media, Fastclick and Mediaplex are most often detected (by 8 of the 11 anti-spyware programs tested).
  - Yahoo's pay-per-click ad conversion tracking cookies were detected by six spyware programs, while none of Google's conversion cookies were caught.
- Only 8% of respondents delete cookies "very frequently," compared with 18% in a 2004 survey. Additionally, 24% said they never delete cookies, more than double what was measured in the previous study. [The Ponemon Institute/Revenue Science, April 2006].

Results from previous Cookie Deletion Surveys:

Source	% of Users Reporting They Delete Cookies at Least Monthly
Belden	39.0% – 46.5%
RedEye	55%
Nielsen NetRatings	43.7%
Jupiter	39%

[Source: Atlas Institute, 2005]

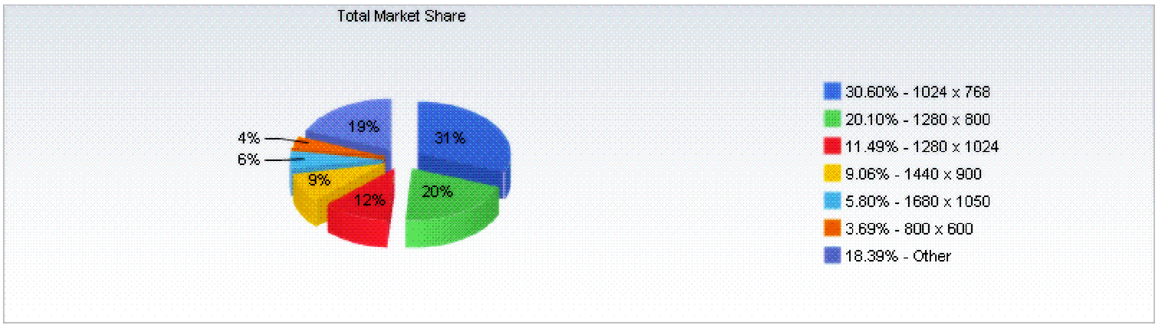
United States

- A cookie deletion study of 400,000 internet users by comScore found that that unique visitor counts for websites may be overstating the actual visitor totals by as much as 150%. [Source: comScore via Econsultancy Blog, April 2007]
  - comScore found that three in ten US internet users regularly delete cookies from their computers.
  - An average of 2.5 first-party cookies were observed on each PC studied by comScore.
  - 31% of users deleted first-party cookies at least once during the month - the study found an average of 4.7 different cookies the site studied.
  - Just 7% deleted cookies more than four times, but this group accounted for 35% of all cookies in the study - an average of 12.5 per user for the site in question.

5.10. Display / Screen Resolution

International

- As always, the trend towards larger screen resolutions continues. 1024 x 768 remains the dominant screen resolution at 30%, with 1280x800 at 20%. The number of users browsing at 1024x768 has fallen by 21% since September 2008 [Source: Net Applications, October 2009]

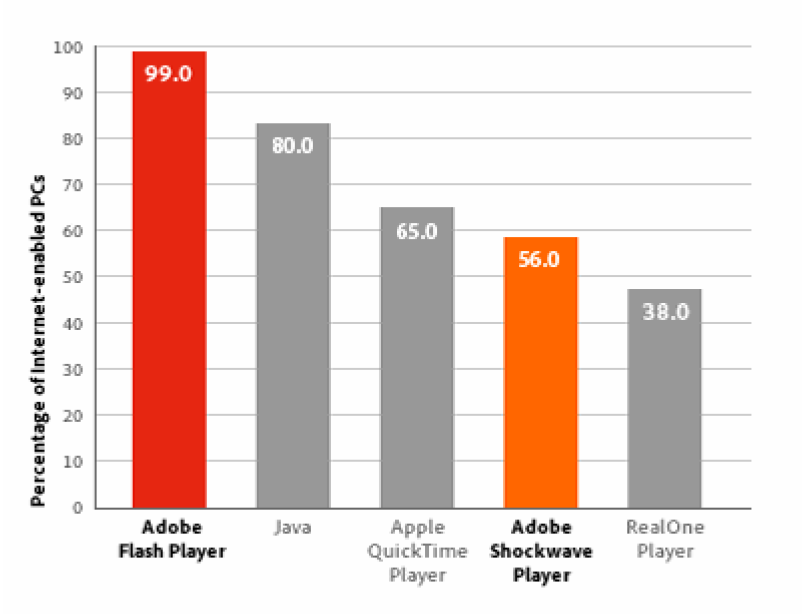


Date	1440x900	1280x1024	1280x800	1024x768	800x600
Oct 09	9.06%	11.49%	20.10%	30.60%	3.69%
May 09	8.82%	12.12%	20.46%	33.44%	4.05%
Sep-08	7.47%	13.14%	18.2%	39.12%	5.03%
Date	**Higher**	**1024x768**	**800x600**	**640x480**	**Unknown**
Jan-08	38%	48%	8%	0%	6%
Jan-07	26%	54%	14%	0%	6%
Jan-06	17%	57%	20%	0%	6%
Jan-05	12%	53%	30%	0%	5%
Jan-04	10%	47%	37%	1%	5%
Jan-03	6%	40%	47%	2%	5%
Jan-02	6%	34%	52%	3%	5%

[Source: OneStat.com (data before 2008) / Net Applications (data after Jan 08)]

5.11. Flash / Java / QuickTime penetration

- Penetration of Flash & other media platforms on internet connected desktop computers. [Source: Millward Brown via Adobe, April 2009]



Worldwide Ubiquity of Adobe Flash Player by Version: September 2009			
	Flash Player 8	Flash Player 9	Flash Player 10
Mature Markets	99.7%	99.6%	93.5%
US/Canada	99.7%	99.6%	94.5%
Europe	99.3%	99.3%	91.7%
Japan	99.5%	99.0%	92.8%
Australia / New Zealand	99.2%	99.2%	92.6%

Mature markets includes: US, Canada, UK, Germany, France, Japan, Australia, New Zealand

[Source: Adobe, October 2009]

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eGovernment News	Kontraband	Postini	Enquisite
eCircle	London Business School	Princeton Survey Research Associates International	M-Metrics
EIAA	eDigital	Thomson Intermedia	Mobile Data Association
360i	Elogisitcs Magazine	Lyris Technologies	Prospectiv
Accessibility Forum	Email Systems	M:Metrics	PwC
ACNielsen	EmailLabs	Macromedia	Quaestor Research and Marketing Strategists
Actinic	EmailMonitor	Makovsky & Co	Questus
Admap	eMarketer	Marketing magazine	Rax.ru
AdTech AG	Empirix	Marketing Week	RCT Analytics
AlchemyWorx	Employers' Forum on Disability	MarketingProfs	Receptional
Amazon	Enpocket	MarketingSherpa	Responsys
Analysys International	Enquiro	MarketingVox	Return Path
Anti-Phishing Group	Entertainment Media Research	McKinsey	Revenue Science
AOL	Epsilon Interactive	MediaBuyerPlanner	Revolution
AOP	Equi-Media	Media Contacts	RNIB
AP	eROI	MediaPost	Royal Mail
APACS	eTForecasts	Merchant Risk Council	Russell Research
Atlas	Eyeblaster	Merrill Lynch	Scarborough Research
Axon Publishing	Financial Times	MetaPack	SciVisum
Bango	Forrester	Millward Brown	Search Engine Guide
BARB	Foviance	Mintel	SearchEngineWatch
B2B Marketing	Fireclick Index	Microsoft bCentral	SearchIgnite
BBC	Gallup	MMXI	SEMPO

BCG	Gartner	Mobile Data Association	Sento Corp
BCS	GetSafeOnline	Motorola	SEO-PR
Ben Edelman	GfK market research	MSN	Silicon.com
Benchmark Research	GMI	Mutual Points	silverPOP
Bernstein Research			
Bigfoot Interactive	Goldman Sachs	Nakamura Communications	Site Confidence
BIGResearch	Gomez	Net.Applications.com	SiteIntelligence
BizRate/Shopzilla	Google	National Sales Association	Sky
Bloglines	Group M	National Statistics	Sophos
Bradley Horwitz	Guardian	NetIQ	Spannerworks
Brandweek	Guardian Unlimited	Netonomy	Spectrum Strategy
BRMB	GVU	Newspaper Association of America	Starcom
Bronto	Harris Interactive	Nielsen Analytics	Steelside
Brown University	Harvest Digital	Nielsen Entertainment	Strategy Analytics
Browser News	Hitwise	Nielsen//NetRatings	Technorati
BSkyB	Hostway	NMA	Telecom Express
BURST! Media	IAB	Nomensa	Telephia
Carat	IAMAI	NOP	TGI.net
CDMS	iBurbia	NPD Online	The Independent
China Internet Network Information Center	ICQ	NTC Research	The Kelsey Group
Chris Sherman	IDM	Office of Communications	The Scotsman
Church of the Customer	IDS	OFT	The Times
Cida	IFPI	Olswang	The Usability Company (Foviance)
ClickForensics	i-Level	OMD Insight	TheWiseMarketer
Clicks2customers	i-Village	OneStat	Thomas, Townsend & Kent
ClickZ	IMRG	Oneupweb	TNS
comScore	IMS Research	Online Publishers Association	Touch Clarity
Commtouch	Informa Telecoms & Media	ONS	TradeDoubler
Compete Inc	Information Week	OPT-4	Transversal

Contact MC	Initiative	Orange Broadband	TravelDailyNews
Continental Research	In-Stat	Outsell	Unica
Coremetrics	InsightExpress	Overture	Universal McCann
Cornell University	Intel	Panlogic	University of Oxford
Cranfield School of Management	Interpublic	Paypal	Useit.com (Jakob Nielsen)
CyberSource	IPA	PCPRO	Verdict Research
Cymfony	Ipsos	PC World Magazine	W3C
Dart	IPT	Performics	Wanadoo UK plc & SPA
Datamonitor	IronPort	Perseus	Webroot
Dave Chaffey	iProspect	Pew	WebSideStory
Deloitte	Ipwalk	Pheedo	Wireless World Forum
Deutsche Bank	iResearch	PhoCusWright	Workplace Print Media
Digital Strategy Consulting	iMedia Connection	Point Topic	Yahoo!
DoubleClick	IRN Research	Piper Jaffray & Co	Yankee Group
DirectGov	ITFacts	Ponemon Institute	YouGov
Direct Partners	Joshua ConsumerCheck	Porter Research	ZDNet Research
Direct Marketing Association	Juniper Research	Precedent	Zendor
DRC	JupiterResearch	Porter Novelli	Zona Research
Dynamic Logic	Snow Valley	Merkle	Edison Media Research
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