















# Online Market Highlights

State of the UK Online Market  
February 2010

# The Stats...Global Online Universe

			Month-on-month % change
Global (10 Countries)		470,098,876	-0.8%
Japan		52,121,708	-1.2%
Australia		14,790,025	<b>+0.1%</b>
*Brazil		28,613,541	-0.2%
US		201,191,221	-0.9%
Europe (6 countries)		173,382,381	-0.8%
*Switzerland		3,999,050	-3.3%
Italy		24,133,715	-1.2%
Spain		25,102,204	<b>+0.7%</b>
*Germany		44,622,188	-2.1%
France		36,929,016	<b>+0.3%</b>
UK		38,596,208	-0.7%

• This month, 470 million people across 10 countries accessed the Internet.

• 37% of them were in Europe & 43% in the US.

Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work), \*Home only data

Global & Europe include Home & Work data for UK, France, Spain, Italy, US & Australia; Home only data for Brazil, Switzerland & Germany

# The Stats...UK Online Universe

year on year  
% change



77%	Internet Penetration in the UK*	+5% pts
46,388,657	Number of people aged 2+ with Internet access (Total Universe Estimate)	+7%
38,596,207	Number of people aged 2+ that were active Online (Active Universe)	+9%
95 Billion	Number of web pages viewed@	+22%
2,557	Average number of web page views per person	+12%
46	Average number of visits/sessions per person	-1%
86	Average number of unique domains visited per person	+3%

@ Pages are counted only when they fully load into the user's browser window.

Source: UKOM APS, Feb10 (Internet Applications Included, Home & Work), \*UKOM/NRS establishment survey



# UK Online Universe...Home & Work

	Home & Work	Home	Work
<b>Active Digital Media Universe</b> (Active during the current month)	38,596,207	30,370,589	15,493,452
<b>Total Digital Media Universe</b> (Have Online Access)	46,388,657	42,920,661	15,816,357
<b>Visits/Sessions Per Person</b>	46	36	44
<b>Domains Visited Per Person</b>	86	75	116
<b>Web Page Views Per Person</b>	2,557	1,947	2,521
<b>Duration of Web Page Viewed</b>	00:00:53	00:00:50	00:00:58

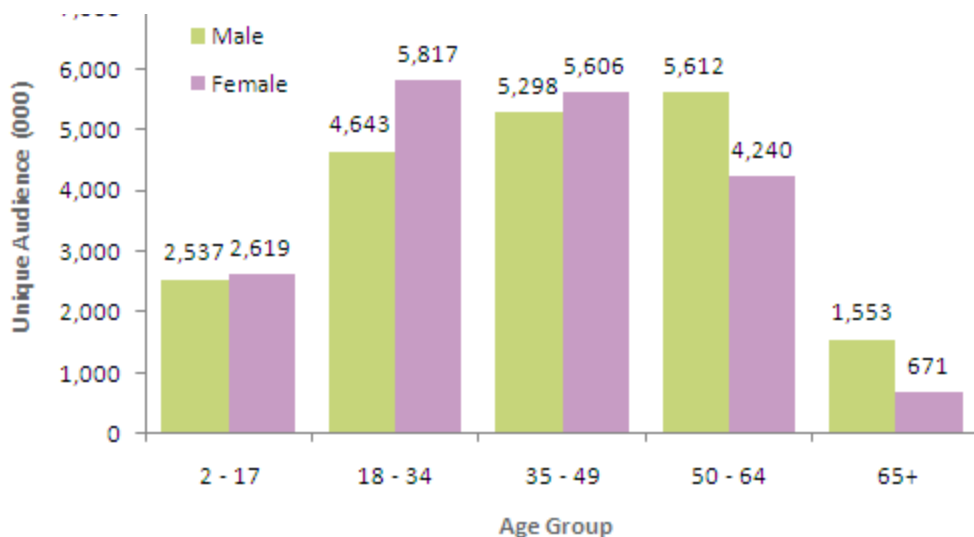
- Robust UK panel of 65,000 individuals
- UK Active Universe = 38m+ active users this month
- UK Total Online Universe = 46m+ people with Internet access
- Number of Brands reported=6,166; Domains = 7,800; Applications= 91

Source: UKOM APS, Feb 10 (Internet Applications Included)

# Online Universe Profile...Gender



Unique Audience		
	(000)	%Chg
Total	38,596	<b>-0.7%</b>
Male	19,643	<b>-0.4%</b>
Female	18,953	<b>-1.0%</b>

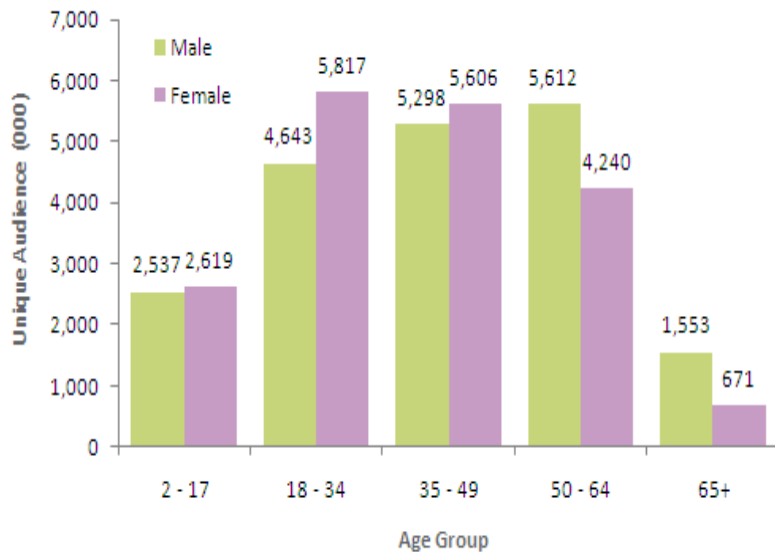


• This month, The total internet audience has decreased by -0.7%. The highest decline was observed among the female audience (-1%).

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Online Universe Profile...Age

- Male (+3.3%) and female (+4.5%) 35 to 49 show the largest % increase and 2 to 17 display the biggest drop in February (-5.9% for male and -6.9% for female)



Unique Audience Audience Composition				
Age	Male%	%UA Change from Jan10	Female%	%UA Change from Jan10
2-17	2,697	-5.9%	2,812	-6.9%
18-34	4,683	-0.9%	5,962	-2.4%
35-49	5,130	+3.3%	5,366	<b>+4.5%</b>
50-64	5,623	-0.2%	4,335	-2.2%
65+	1,581	-1.8%	676	-0.7%

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb10 (Internet Applications Included, Home & Work)

# UK Online Landscape...Top 15 Sites

## Top 15 Sites by Brand Rank: Unique Audience

- Out of 95.4 billion pages viewed online this month (7021 sites), 41.8bn were on the Top 15 sites.
- Ask Search Network dipped -12.2% over last month, which is the largest percent drop. Amazon dipped -9.6% and Sky Portal -9%

Brand	Rank Feb10	Unique Audience (000)	Rank Jan10	Unique Aud. % Change
Google	1	33,039	1	-2.1%
MSN/WindowsLive/Bing	2	27,091	2	-2.2%
Facebook	3	23,417	3	-2.2%
BBC	4	20,515	4	-9.2%
Yahoo!	5	20,468	5	-2.2%
Microsoft	6	17,406	6	-3.1%
eBay	7	16,889	7	-2.3%
YouTube	8	16,140	9	-4.4%
Amazon	9	15,419	8	-9.6%
Wikipedia	10	14,272	10	-4.8%
Apple	11	10,975	11	-8.0%
Ask Search Network	12	10,176	12	-12.2%
AOL Media Network	13	8,816	13	-7.1%
Associated Newspapers	14	8,333	15	-4.7%
Sky Portal	15	8,284	14	-9.0%

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# UK Online Universe...Key Stat

**Key Stat: 94.93%**

Top Sites by UA	Unique Audience (000)	Active Reach
Google	33,039	85.6
MSN/WindowsLive/Bing	27,091	70.2
Facebook	23,417	60.7
BBC	20,515	53.2
Yahoo!	20,468	53.0
<b>TOTAL</b>	<b>36,638</b>	<b>94.93%</b>

Top five websites remain the same this month and reach 94.93% of the UK Online market!

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)



# Top Sectors...Unique Audience

SubCategory	Rank Feb	Unique Audience (000) Feb10	Rank Jan	Unique Audience (000) / Jan10	Unique Aud. % Change (Jan/Feb)
Search	1	35,125	1	35,853	-1.2%
General Interest Portals & Communities	2	33,184	2	33,538	-0.2%
Member Communities	3	28,944	3	29,129	-1.9%
Software Manufacturers	4	26,977	4	27,387	-1.0%
E-mail	5	26,521	5	26,864	-3.8%
Mass Merchandiser	6	25,058	7	24,989	-2.2%
Current Events & Global News	7	24,815	6	27,345	-3.4%
Internet Tools/Web Services	8	24,793	8	24,799	-3.8%
Videos/Movies	9	24,118	9	24,148	-3.3%
Multi-category Entertainment	10	23,152	10	23,674	-3.9%
Full Service Commercial Banks & Credit Unions	11	21,732	13	21,051	+1.4%
Research Tools	12	20,208	12	19,718	-1.8%
Maps/Travel Info	13	20,117	14	21,066	-0.9%
Broadcast Media	14	19,941	11	19,373	-10.3%
Instant Messaging	15	19,819	16	16,294	-2.0%

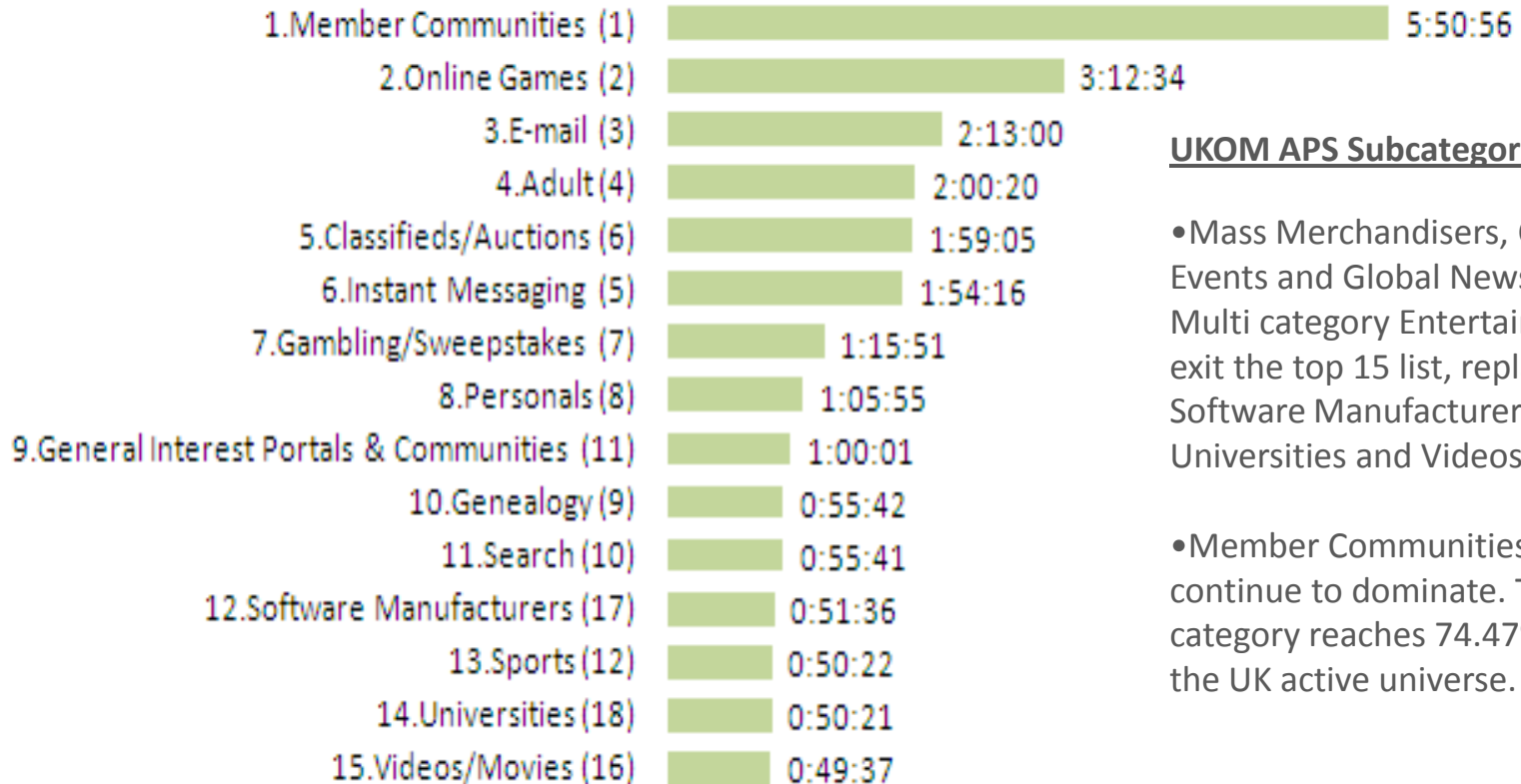
## UKOM APS Subcategories:

The Government Subcategory has been replaced by Instant Messaging in the top sectors this month.

UK Active Online Universe **38,596,208**; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Top Sectors...Time Spent Online

## Time per Person (hh:mm:ss) Feb 10



### UKOM APS Subcategories:

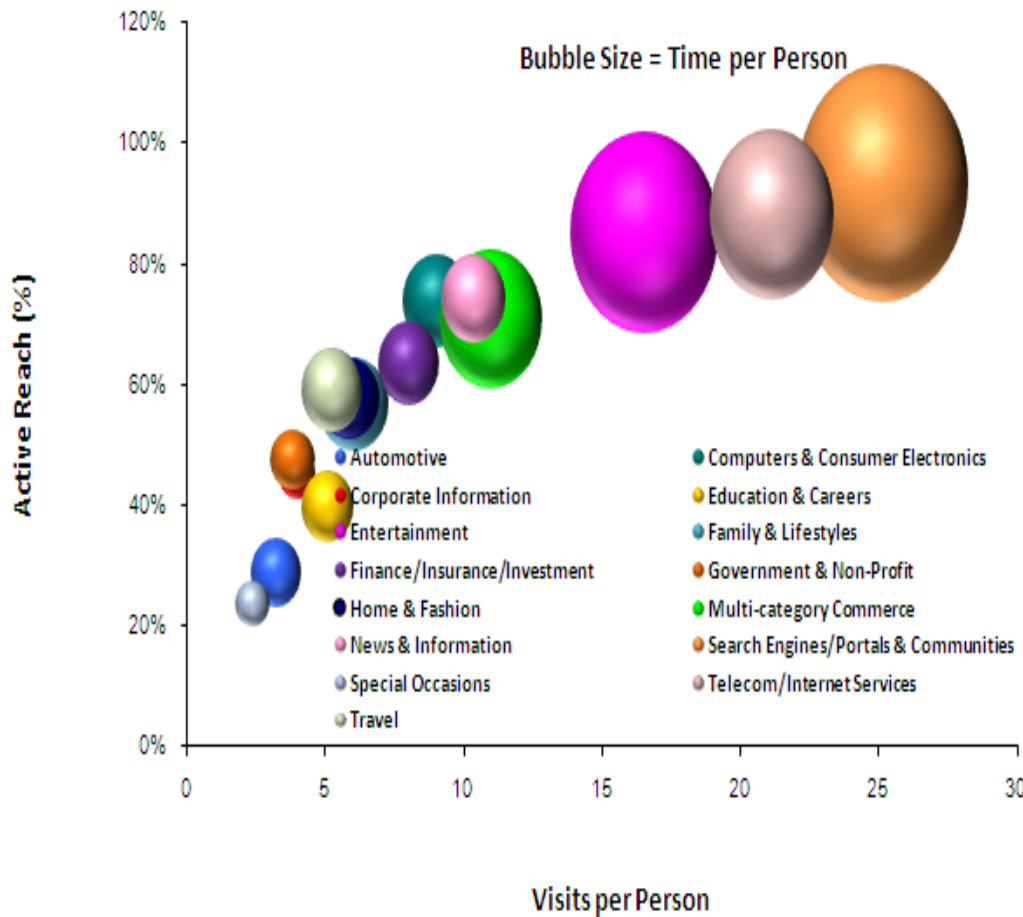
•Mass Merchandisers, Current Events and Global News, and Multi category Entertainment exit the top 15 list, replaced by Software Manufacturers, Universities and Videos/Movies.

•Member Communities sites continue to dominate. This subcategory reaches 74.47% of the UK active universe.

*Note: Previous month ranking in between brackets*

**UK Active Online Universe 38,596,208;** Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Stickiness...Categories



## UKOM APS Categories:

- Surfers make the most frequent visits to Search Engines/Portals & Communities (31 visits per person) as well as Telecom/Internet Services (25 visits per person) site categories.

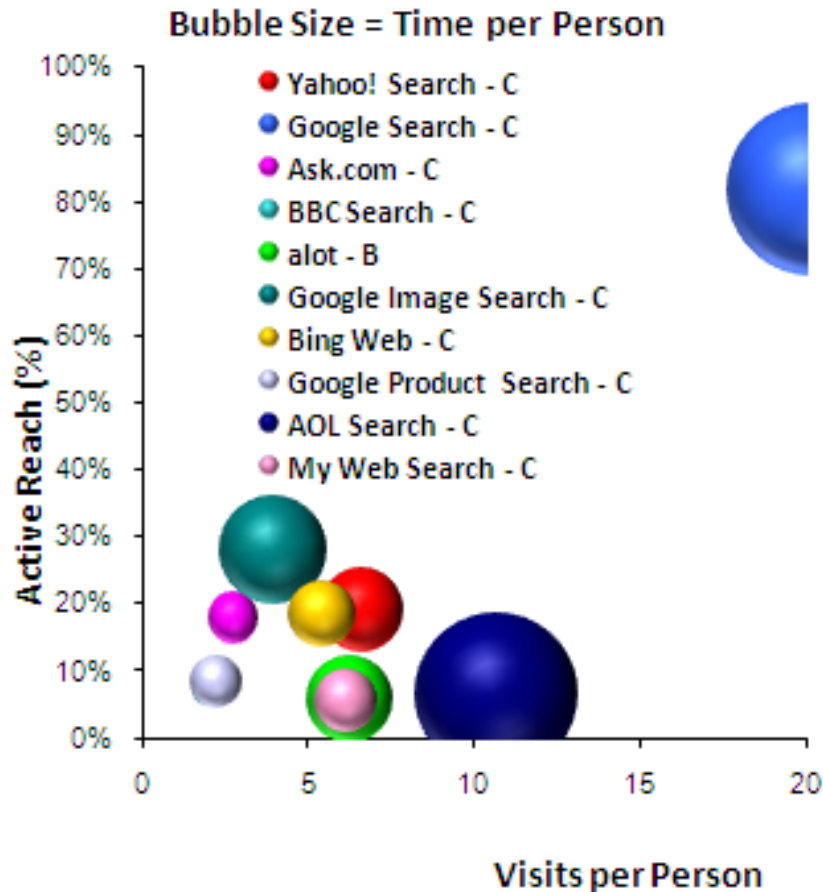
Top 5 Categories	Visits Per Person	Active Reach	Time Per Person
<b>Search Engines/Portals &amp; Communities</b>	31	94.32	06:26:14
<b>Telecom/Internet Services</b>	25	89.32	03:25:36
<b>Entertainment</b>	20	86.41	04:36:09
<b>News &amp; Information</b>	14	78.12	01:06:57
<b>Computers &amp; Consumer Electronics</b>	11	76.92	01:06:00

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Stickiness...Search Category

## Search Category:

- Google Search is still the stickiest Search Brand with an active reach of 82%, followed by Google Image Search (28%), and Yahoo! Search (19%).



Top 5 Brands/Channels	Visits Per Person	Active Reach	Time Per Person
Google Search	20	81.53	00:42:13
Google Image Search	4	27.96	00:16:09
Yahoo! Search	7	18.79	00:09:57
Bing Web	5	18.26	00:06:05
Ask.com	3	17.77	00:03:38

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)



# Top Applications

Top Applications by Unique Audience	Unique Audience (000)	Active Reach
<b>Windows Live Messenger (App)</b>	14,003	36%
<b>Windows Media Player (App)</b>	13,023	34%
<b>iTunes (App)</b>	7,140	19%
<b>RealPlayer (App)</b>	5,536	14%
<b>Skype (App)</b>	3,772	10%
<b>Apple QuickTime (App)</b>	3,528	9%
<b>Google Earth (App)</b>	2,338	6%
<b>Yahoo! Messenger (App)</b>	1,918	5%
<b>LimeWire (App)</b>	1,551	4%
<b>Picasa (App)</b>	1,457	4%

Windows Live Messenger remains the top application reaching 36% of the active UK universe followed by Windows Media Player (34%).

World of Warcraft is the number 1 application by average time spent per person on applications followed by Pacific Poker and VNC Viewer.

Top Applications by Time Spent*	Unique Audience (000)	Time per Person (hh:mm:ss)
<b>World of Warcraft (App)</b>	154	31:21:00
<b>Pacific Poker (App)</b>	120	6:28:28
<b>VNC Viewer (App)</b>	252	4:45:51
<b>Turbo Lister (App)</b>	131	4:35:38
<b>MSN Zone (App)</b>	202	3:04:03
<b>SopCast (App)</b>	116	2:32:21
<b>VLC media player (App)</b>	1,189	1:49:31
<b>Windows Live Messenger (App)</b>	14,003	1:44:32
<b>Yahoo! Messenger (App)</b>	1,918	1:30:12
<b>iTunes (App)</b>	7,140	1:28:28

\*With over 100,000 Unique Audience

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Top Sites...E-Commerce Category

## Top Sites by UA Rank: Unique Audience

This month Ebay is number one in the E-Commerce category reaching 44% (17.3M) of the active UK universe.

The biggest % drop comes from play.com (+13%) in the Top E-Commerce sites this month.

There is a general drop in Unique audience in the Ecommerce category this month.

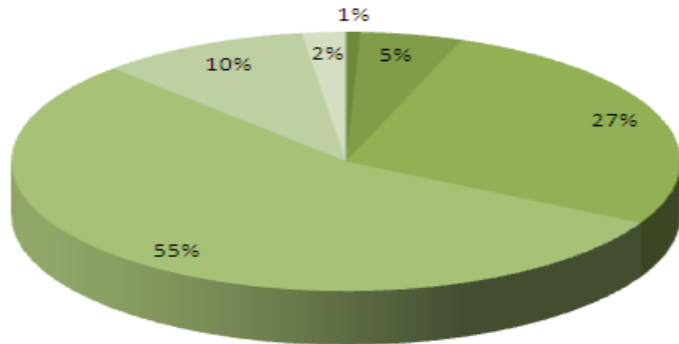
Brand	Rank Feb	Unique Audience (000)	Rank Jan	Unique Aud. % Change
<b>eBay – B</b>	1	16,889	1	-2.3%
<b>Amazon – B</b>	2	15,419	2	-9.6%
<b>Tesco – B</b>	3	7,939	3	-6.8%
<b>Argos – B</b>	4	6,735	4	-17.1%
<b>Play.com – B</b>	5	4,478	5	-13.0%
<b>Marks &amp; Spencer – B</b>	6	3,984	6	-6.7%
<b>ASDA – B</b>	7	3,762	7	-8.5%
<b>MoneySupermarket.com – B</b>	8	3,296	10	-6.0%
<b>John Lewis – B</b>	9	2,938	9	-22.2%
<b>Gumtree.com - B</b>	10	2,925	11	-6.0%

UK Active Online Universe 38,596,208; Source: UKOM APS, Feb 10 (Internet Applications Included, Home & Work)

# Line Speed...Pages & Time per Person

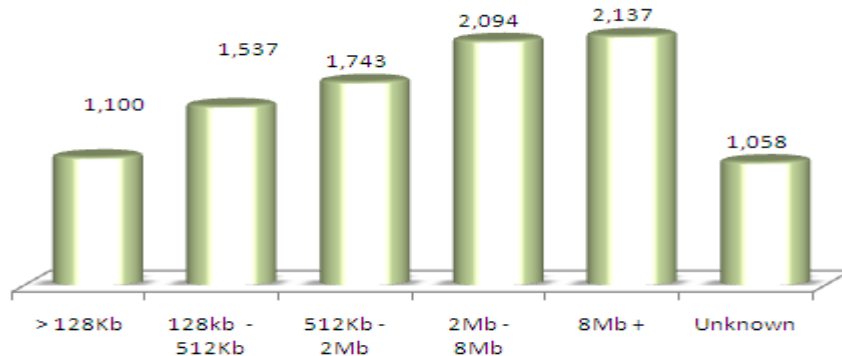
## ACTIVE UNIVERSE

■ > 128Kb   
 ■ 128kb - 512Kb   
 ■ 512Kb-2Mb  
■ 2Mb - 8Mb   
 ■ 8Mb +   
 ■ Unknown

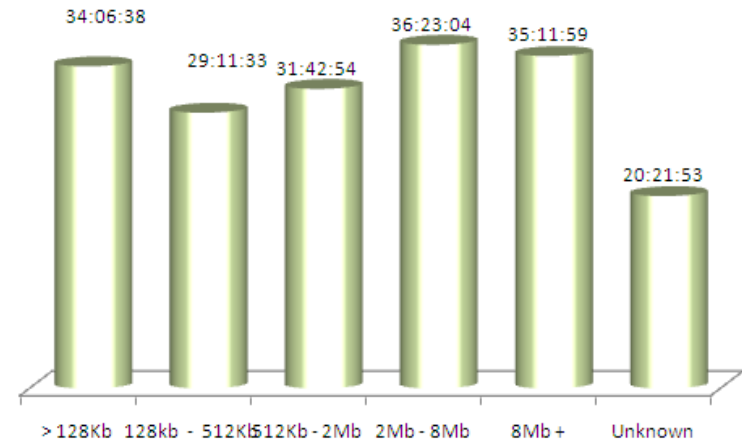


- 82% of @Home UK Internet Users access the Internet with a connection speed between 512kb & 8Mb (29% 512kb-2Mb & 53% 2Mb-8Mb)
- 10% have a connection of 8Mb+

## Pages per Person

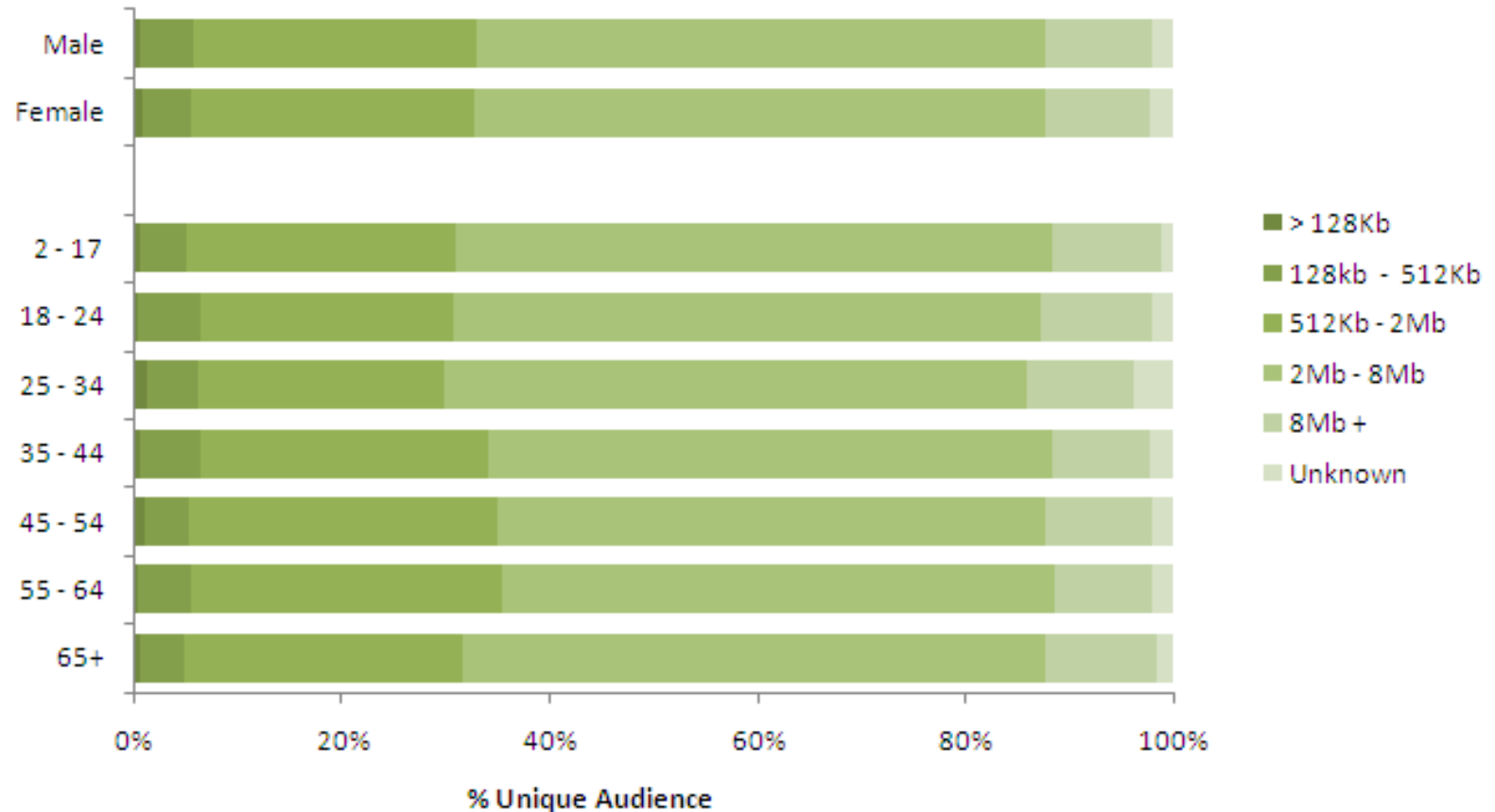


## Time per Person



Source: NetSpeed Report UK Feb 10 (Internet Applications Included, Home only)

# Line Speed...Age & Gender Breakdown



- Men & Women are mostly using the same connection speeds

Source: NetSpeed Report UK Feb 10 (Internet Applications Included, Home only)





# About UKOM APS

UKOM APS is the Internet audience measurement tool that provides granular detail about the online usage of people aged 2+ from home & work locations.

UKOM APS offers comprehensive insight into the world of the online consumer with analysis of behavior, trends and detailed demographics. UKOM APS gives you a comprehensive perspective of your site, your audience, and your competitor. Combining more than 50 years of best practices in audience measurement research with advanced tracking technology, UKOM APS provides the most accurate and reliable online user reports available to Internet advertisers, agencies, marketers and publishers. UKOM APS delivers the most in depth and reliable site measurement information possible.

For more detail on our methodology, or other questions, please contact your Nielsen Online Account Manager.

## **The Nielsen Company**

Phone: 020 7014 0590

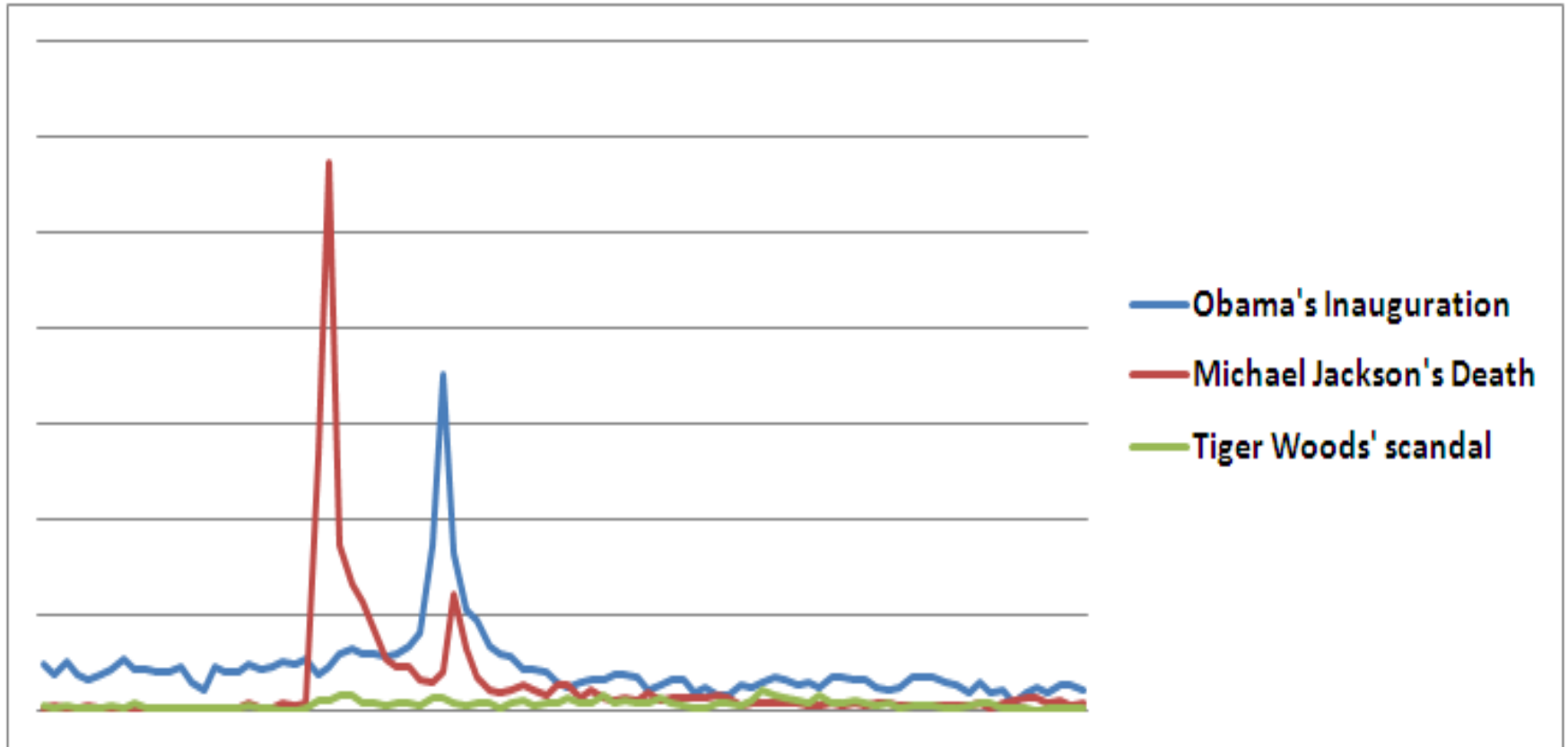
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Client Services: [clientserviceUK@nielsen.com](mailto:clientserviceUK@nielsen.com)



# Other Nielsen Online data

# My BuzzMetrics Example report



My Buzzmetrics shows Tiger Woods' apology for his marital indiscretions did not generate as much buzz from UK Internet audiences as President Obama's inauguration or Michael Jackson's funeral.

Source: MyBuzzMetrics Report UK

# Mobile Internet: Top Search Sites

Brand or Channel	Unique Audience (000)	Active Reach (%)	Mobile Subscriber Penetration	Rank by Unique Audience	Average Visits Per Person Per	Average Time Per Visit(min)
Google Search	5,780	48.9	11.89	1	11.9	7
Yahoo! Search	642	5.4	1.32	2	9.6	7
wikipedia	394	3.3	0.81	3	5.6	6
BBC Search	363	3.1	0.75	4	7.0	8
MSN-Windows Live Search	290	2.5	0.60	5	7.8	9
Ask.com*	285	2.4	0.59	6	8.5	8
Orange Search	280	2.4	0.58	7	4.0	5
My Web Search*	187	1.6	0.39	8	9.0	6
Yell.com**	133	1.1	0.27	9	2.0	5
AOL Search**	119	1.0	0.24	10	3.8	8
Go2 Search**	107	0.9	0.22	11	2.2	12
Tiscali Search**	78	0.7	0.16	12	2.7	5
AltaVista Search**	68	0.6	0.14	13	1.2	2

\*These categories do not meet minimum sample size standards. Projected and average measures for these sites may exhibit large changes month-to-month as a result.

\*\*These categories have insufficient sample sizes for reliable projection of audience size.

## Top UK Search sites,Q4 2009

Source: Mobile Media View UK; Report: Standard Metrics (IM Applications Excluded) Brand Period: Qtr 4, 2009 Operator: All Operators

# AdRelevance Statistics: Top Advertisers by Ad Impressions

Advertiser	Ad impressions (000)	Ad spends (000GBP)
Virgin - Virgin Media	212,121	2,161
O2 / Viag Interkom	184,588	2,515
DirectGov	167,522	2,399
BSkyB - Sky.com	149,198	2,109
HSBC Group - HSBC	115,163	1,095
RAC	76,951	730
Hutchison / Three / 3 / 3G	76,443	951
CreditExpert	75,257	1,146
BT - British Telecom	75,062	1,052
BlackBerry	74,484	1,090
American Express	72,805	985
British Gas	67,182	1,256
Javari	59,288	178
Totally Money	59,071	1,034
Octopus Travel	57,946	695
Thomas Cook	53,727	874
Ultralase	52,476	869
Tesco	52,405	694
Virgin - Virgin Mobile	49,029	476

Source: AdRelevance UK: Ad Spend and Impressions Statistics, Feb10

# About BuzzMetrics

Nielsen BuzzMetrics™ is the global measurement standard for consumer-generated media (CGM), a term we coined to describe the explosive growth of online content, opinion, recommendations, word-of-mouth behaviour and, of course, buzz.

With solid data-mining technology, superb research and Nielsen's unrivaled experience in media measurement and client services, we help today's companies, brands and business professionals better understand the influence and impact of CGM on products, issues, reputation and image.

For more detail on our methodology, or other questions, please contact your Nielsen Online Account Manager.

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# About Mobile Internet Measurement

Mobile Internet Measurement is the global measurement standard for bringing online audience measurement to the mobile web.

Delivering comprehensive, independent measurement and analysis of the mobile online audience, Mobile Internet Measurement enables you to make informed business decisions regarding the mobile web. Whether examining your mobile site's audience or searching to optimize your mobile advertising strategy, you'll get easy-to-use information to help you achieve your goals:

- Keep on top of the changing mobile landscape with Mobile Internet Measurement from Nielsen telecom practice. You'll get fresh insights and analysis for over 250 mobile websites, providing audience measurement by site, brand and online category.
- Gain a deeper understanding of how consumers want to use the mobile internet and see how quickly they are adopting new capabilities. Using this information you'll be able to drive adoption, increase ad relevance, develop the right content and more. Whether you are a content owner or advertiser, device manufacturer or operator, this information will help you to design more targeted solutions to meet the needs of your consumers.
- Get a high-level overview with Nielsen's simple trend overview, or delve more deeply into the demographic make-up of individual sites, brands and categories. And because Mobile Internet Measurement is delivered in the same easy-to-use format as Nielsen Online's UKOM APS, you'll find it easy to compare and contrast wired and mobile web statistics.

For more detail on our methodology, or other questions, please contact us.

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# About AdRelevance

AdRelevance provides Online Advertising Intelligence for Advertisers, Agencies and Publishers

*"AdRelevance allows marketers to keep an eye on their competition. These reports will tell them what sites their competition are advertising on, how many impressions they are buying and also show what the ads actually are. The marketers can then take that data and it is one of the factors used when that company decides on its own media buys."*

Nielsen Online AdRelevance provides online advertising intelligence for fifteen European markets, the US and Asia Pacific. In Europe the service covers the UK, Germany, France, Italy, the Netherlands, Switzerland, Belgium, Austria, Sweden, Norway, Denmark, Portugal, Luxembourg, Spain and Turkey.

The service crawls more than 3,500 websites (over 150,000 urls) in Europe all day, every day, providing indispensable market intelligence on who is advertising online, which sites the campaigns are running on, the duration and frequency of the campaigns, and capturing and storing the creative content.

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