

there is a bomb in this room.

In March 2007, the UK delivered an astonishing number

for the first time online ad sales eclipsed those of national newspaper sales

11.4% of all 2006 ad sales (£2.1 billion) in the UK were online – 41% YOY growth

That's almost half as much as the television buy!

(source: Internet Advertising Bureau UK (IABUK), PricewaterhouseCoopers (PwC), the Advertising Association, the Radio Advertising Bureau and the World Advertising Research Center.)

search:	£1,165.6	(+52%)
display:	£453	(+35%)
classified:	£379	(+45%)

fyi print classifieds declined 8%

our existing business model vanishes when

high speed wireless networks

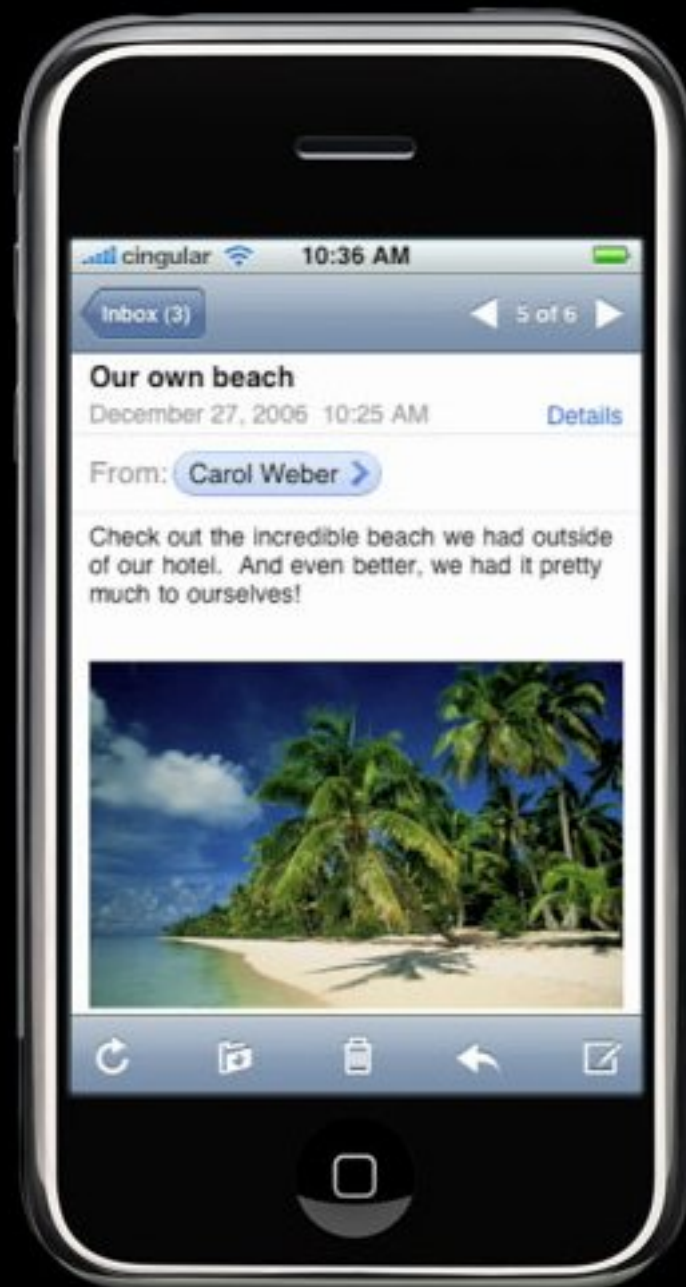
meet

high quality mobile displays

it might look like this



or this



or this..... and that... and...



or this...



the point is: it's coming

when it does, our existing ideas are upended

8% of all phone sales are smart phones

**smart phone users spend an average
of \$6.31 per month on data vs. \$0.31
for non smart phone users**

networks covet smart phone users

But wait, a consideration:

In July 2006, Comscore found that among US broadband users:

94% access the net via PCs

40% use laptops

5% use smart phones

2% use televisions/game consoles

only 5%

Among broadband users comscore found

5% access the internet regularly via mobile phones

58% have the ability to use the internet, but don't

36% don't have internet capable devices.

price is one factor limiting usage

lack of mobile-friendly content also comes into play.

on average mobile phone users conduct 3.3 activities per online session vs. 13.4 for PC access

plus 3G rollouts began in earnest in 2006

age makes the situation more intriguing

among 25-34 year olds, 29% use mobile phones to access the net and another 19% have subscribed in the past

among 18-24 year olds 23% use the mobile net and another 22% have subscribed in the past

Do these numbers and this situation resemble something we've seen before?

Yes.

The pre-broadband internet looked like this.

The mistake one could make then, and now, would be to assume the situation will be the same going forward.

in Japan mobile internet access
is now the most common way of
connecting to the net

It is part of the fabric of daily life

the previous numbers were
from July 2006 in the US

things can change fast.

what did December 2006 look
like in the UK?

54% of UK mobile users
access the mobile net regularly
(more than 75% are net capable)

the UK leads the western world in this
regard.

Projections for 2007 hold that the
UK and France will lead

you want opportunity, I've got
opportunity.....

only 41% of those users find
the mobile net satisfying

other key findings of the OPA study

load time and formatting are big issues
for mobile net

mobile access increases loyalty to the
web site and increase overall usage

sports and weather are prime drivers,
national/local news are very popular too

classifieds tends to be a browsing activity

it's contemplative

leisurely

something to do in front of the computer at
home

and yet certainly some categories of classifieds come alive in a mobile environment

real estate, or even merchandise are transformed if you add maps or additional information

and that is the subject of this panel

the classifieds in your pocket