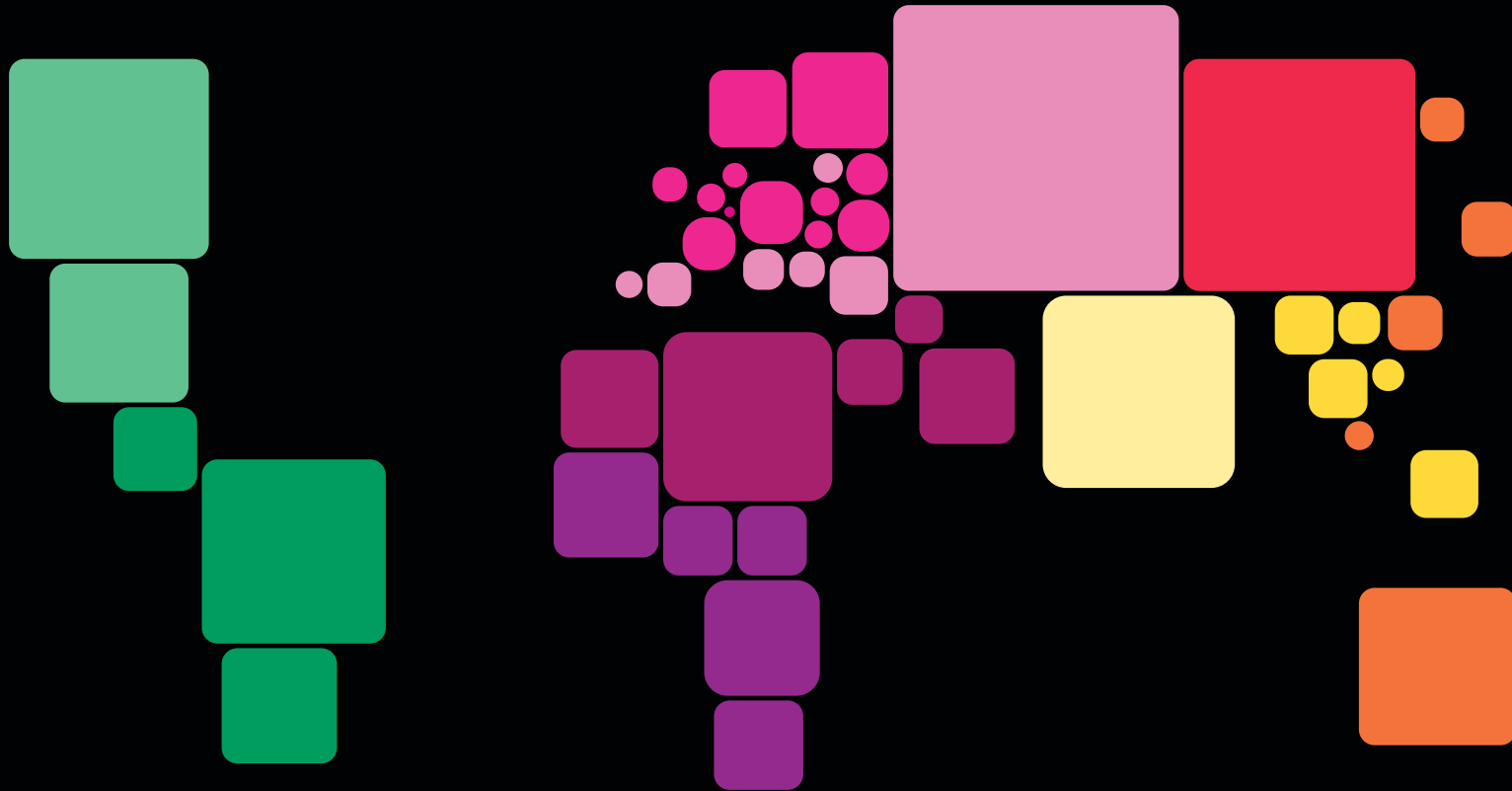


The Digital Landscape





“The internet has been the most fundamental change during my lifetime and for hundreds of years. Someone the other day said... ‘It’s the biggest thing since writing’”

Rupert Murdoch



When adopted, digital becomes the primary media channel for consumers and is already the leading channel for online users in many rapid growth markets as well.

For consumers in these markets, internet access is often a new experience and so these consumers are not tied to legacy uses of the internet. Digital is transformational for these consumers, and offers opportunities to engage in new experiences. It is therefore more aspirational activity than for consumers in mature markets where the internet has become a more commoditised experience over time.

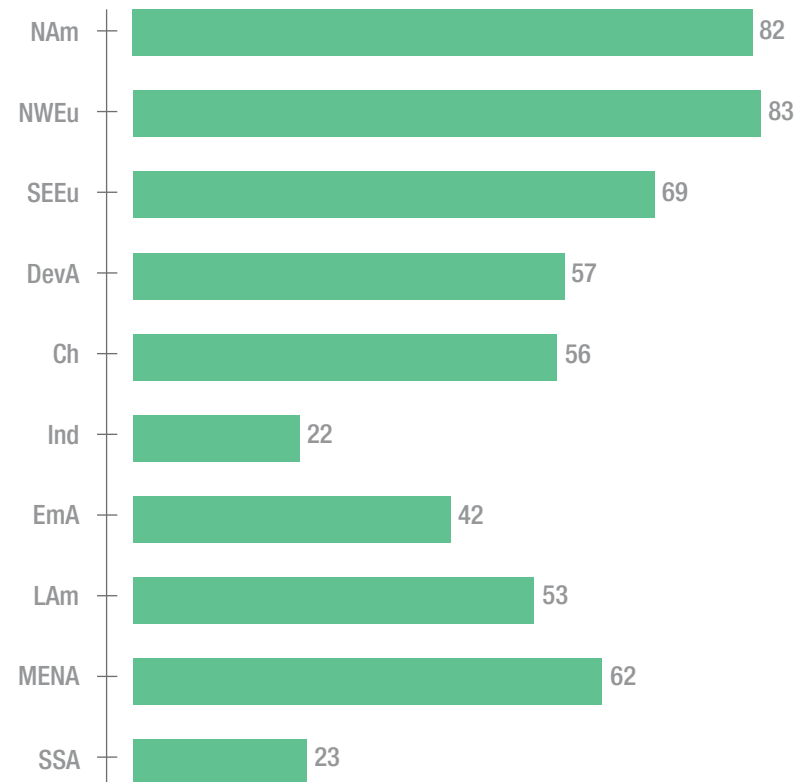
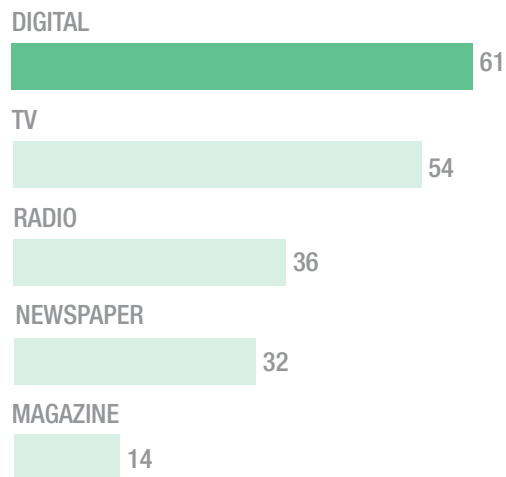
This leads to consumers that are more engaged in the category, and willing to be more active and have a voice in the digital world. As infrastructure improves, consumers in the top tier of rapid growth markets are well positioned to rule the world.

Amongst online users, digital is the primary daily media channel and is already making inroads into rapid growth markets

PERCENTAGE WITH DAILY ACCESS

S5: How often access / i10: Usage of offline media

Bases: All respondents 48804

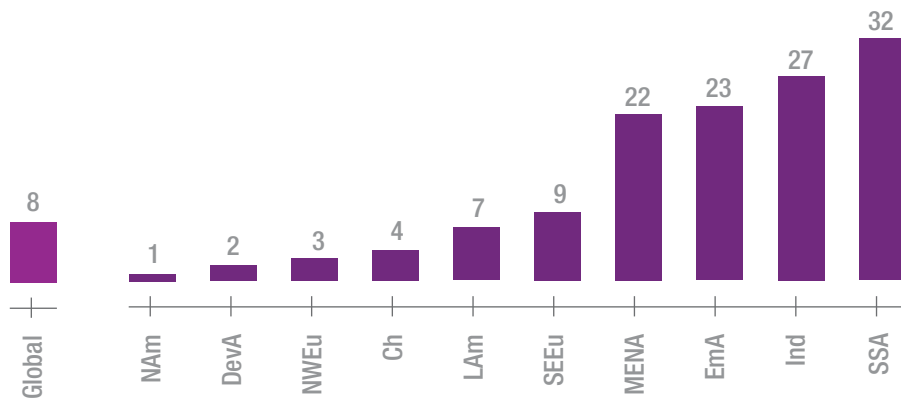


For the emerging world, digital access is new...

% ONLINE USERS WHO STARTED USING THE INTERNET LESS THAN TWO YEARS AGO

S6: First use of the internet

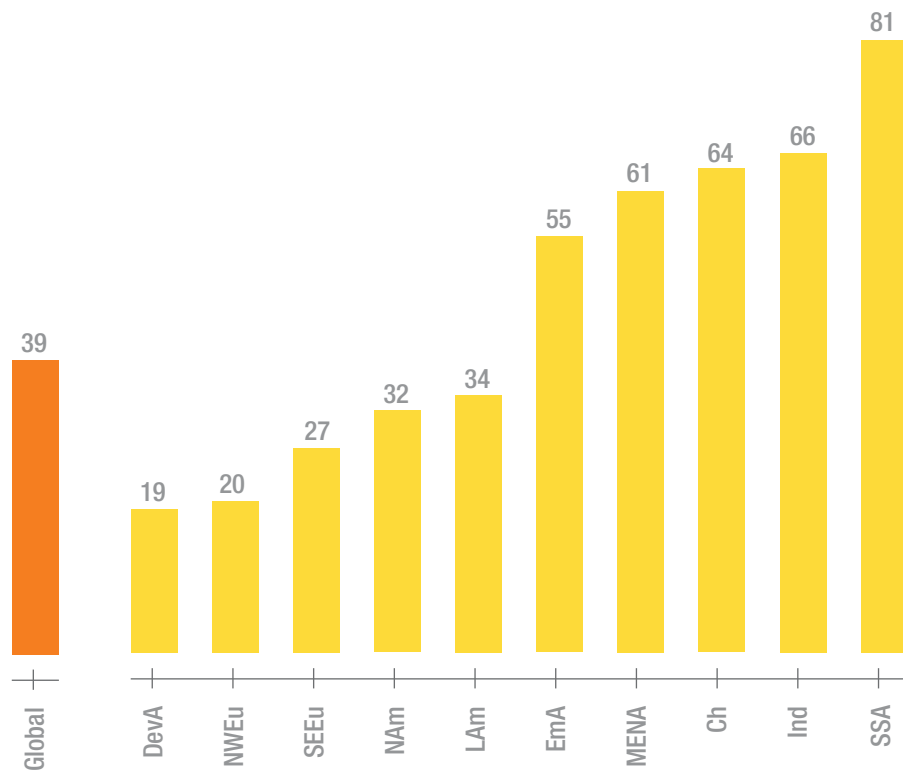
Bases: All respondents 48804



...and transformational

% ONLINE USERS WHO AGREE THAT: 'IN THE ONLINE WORLD, I CAN BETTER EXPRESS MY FEELINGS'

L2: Personal values and attitudes
Bases: All respondents 48804



This leads to greater engagement in the channel

■ % ONLINE USERS ACCESSING THE INTERNET DAILY

● HIGHLY ENGAGED IN DIGITAL

S5: How often access / Digital Engagement is a composite measure of behaviours and attitudes

Bases: All respondents 48804

