

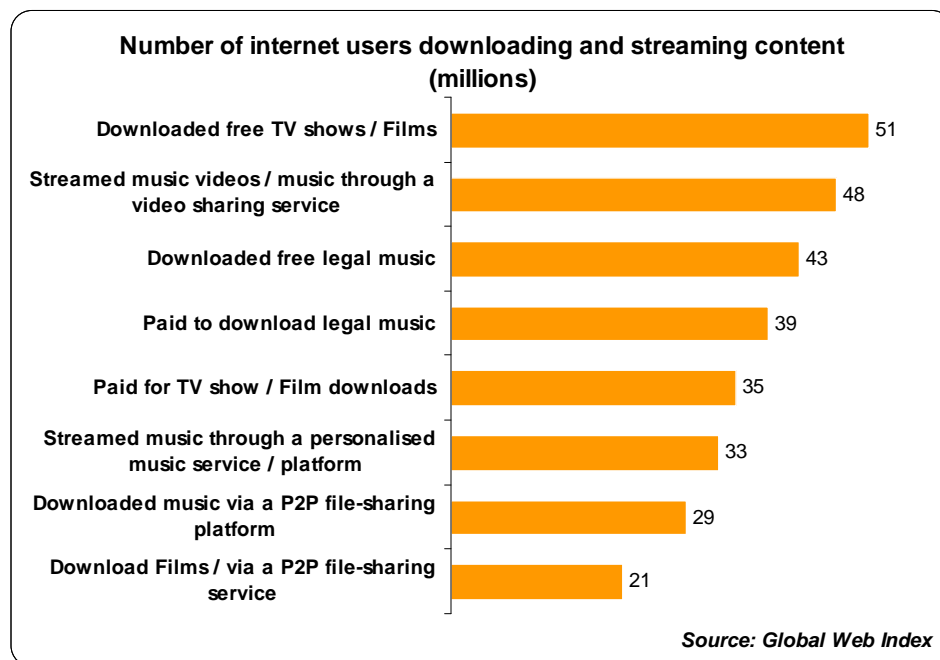
Streaming is destroying piracy

With 115 million internet users downloading or streaming legal music, the US is world leader for paid music

Basking Ridge, NJ (December 16, 2009) -- Findings from the Global Web Index (www.globalwebindex.net), a collaboration between leading online market research provider Lightspeed Research and Trendstream, suggest that the illegal act of downloading media content is being eradicated by streaming in the US market.

According to the Global Web Index, watching online video has become mainstream, with almost 70% of US internet users watching video clips, 28% watching full length TV and video programming and 19% sharing videos. 29% of US internet users have downloaded free TV shows/films.

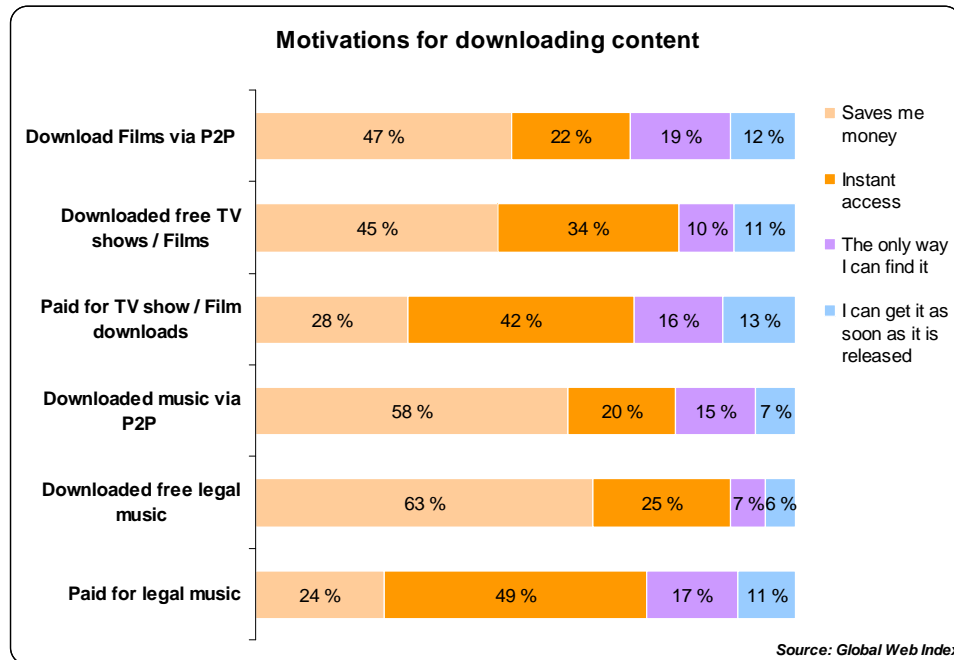
Chart 1



The research shows that after South Korea, the US is the most advanced market in terms of the purchasing content online. The US market can pride itself on having the highest number of internet active users - those who spend more than four hours a day online – that are willing to pay for online content. The latest figures suggest that 39 million internet users have paid to download legal music and 33 million have streamed music through a personalized music platform. In comparison, 28.9 million have downloaded illegally either through a peer-to-peer sharing network or a website offering free illegal downloads. (See Chart 1)

Tom Smith, Managing Director of Trendstream who leads the research, says “Thanks to the rise of online services such as Spotify, Hulu and of course YouTube, the environment has been created where you can stream almost all the content you would ever want. If everything I want is available on demand, the concept of ownership is diminished. I no longer need to have it on my hard drive. I just play what I want when I want. This is not only a threat to traditional packaged sales of music, TV and film - it will also kill off piracy. Why pirate when you can stream?”

Chart 2



It's not just because it's free, it's because it's instant

Although the US market has less issue with staggered content released and benefits from more legal outlets, the lack of legal online alternatives has also created a market for piracy. The research shows that more than half of people downloading illegal media content are not driven by the desire to access it for free. Many are more interested in viewing the content as soon as it is available. Whilst the research shows that consumers don't like using peer-to-peer sites to access content, they will use them when they can't find what they want any other way. (See Chart 2)

Tom Smith concludes “This does not mean consumers won't pay for their online content. When content is great and it can be accessed when and how people want, they will pay. Instead of taking legal action against isolated individuals, content providers should take the opportunity to get their content online in a relevant format and at a fair price. If they do that, people will no longer seek illegal alternatives. In a world of instant information and content, media owners are missing out on millions of dollars of revenue by restricting content through time delays or by relying purely on traditional media delivery.”

-- End --

About Global Web Index

Trendstream created the Global Web Index to derive insights on the global impact of web usage and social web involvement. A collaboration between Trendstream and panel provider Lightspeed

Research, 16,000 web users are interviewed twice a year in 16 markets to provide a unique perspective on web behavior and its impact on consumer behavior, technology involvement, purchasing, content consumption, the effectiveness of marketing communications and the role for brands. Global Web Index provides detailed insight into how web behavior and the value of consumer driven communications differs by country, category and different consumer segments. www.globalwebindex.net

About Lightspeed Research

Through proprietary global panels and research products and services, Lightspeed Research delivers valuable data to help businesses make informed decisions. From recruitment, to activity level, to ongoing profiling, Lightspeed Research's panels are actively managed to provide engaged survey respondents and support studies that range in scope and complexity across industry sectors. Deeply profiled specialty panels including automotive, B2B, beverage, family and household, finance, health and wellness, media consumption, mobile phone, beauty and personal care, sports and hobbies, and travel and leisure, provide quick access to target audiences. As a quality leader, Lightspeed Research has implemented extensive measures to prevent fraudulent panel registrations and poor survey data.

Lightspeed Research is part of Kantar, the information, insight and consultancy division of WPP (NASDAQ: WPPGY), one of the world's leading communications services companies. For more information, please visit www.lightspeedresearch.com or send an email to info@lightspeedresearch.com.

About Trendstream

Trendstream is a research consultancy dedicated to understanding the global impact of technology change. The company produces primary and secondary research to help clients understand the impact of the web, social technologies, mobile and consumer electronics and the resulting implications for consumer behavior, marketing communications, content and business models. The company also advises clients on social web strategy, business models and monetizing content online.

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