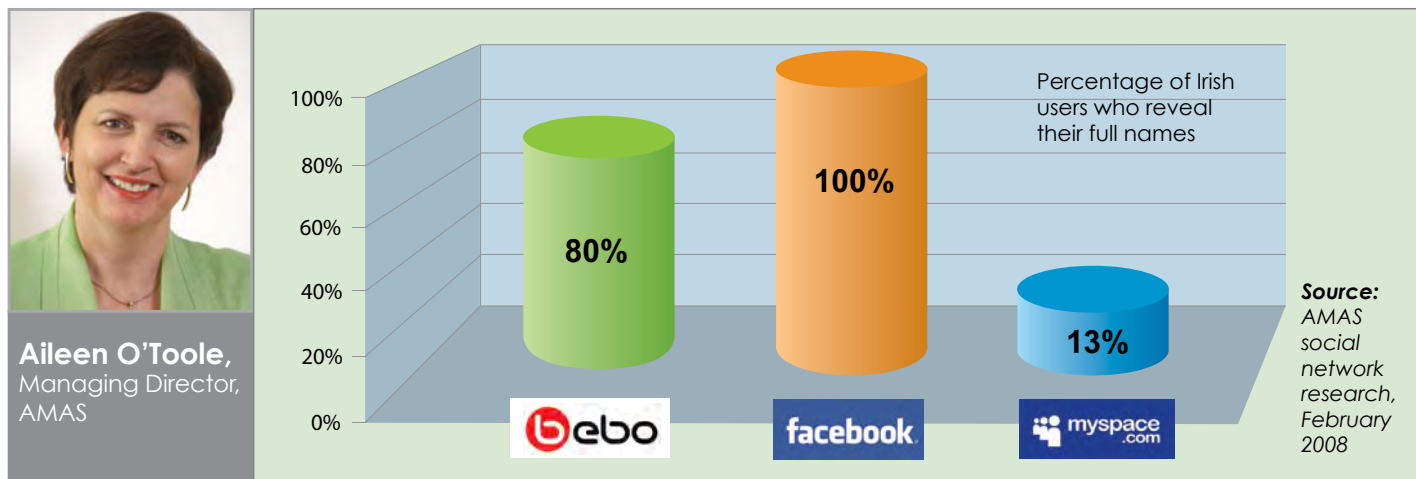


Social network users leave identity theft trail



Irish users of social networking sites are leaving behind a trail of identity clues that can leave them vulnerable to identity theft. An AMAS survey of 300 Irish users of such sites shows that users are more likely to leave their full names on Facebook than on Bebo or MySpace.

All 100 sample profiles on Facebook revealed full names, compared with 80% on the 100 profiles viewed on Bebo and 13% on a similar number viewed on MySpace. Combined with other clues

– such as location, age, school or workplace – this information can be used to identify individuals and give more information about users than they would typically give to complete strangers.

However, the survey also shows that users were exercising some degree of care in not revealing phone numbers or email or physical addresses. Among the 300 profiles reviewed:

- 10 of those surveyed gave their email addresses

- 2 Bebo users posted their full addresses
- 62 Facebook users gave their full dates of birth
- 9 MySpace users revealed their salaries

Guidance from identity theft experts would suggest that there is sufficient information on many of the profiles reviewed to identify the individuals concerned. The AMAS research also found that 98% of Bebo users, 83% of Facebook and 80% of MySpace users post their actual photographs online.

It also showed that although Facebook initially seemed to have the highest privacy protection, it is easy to gain access to a high proportion of profiles. Networks as broadly defined as "Ireland" allow access to anyone else logging in under that category.

Facebook displays full names, while Bebo and MySpace allow a nickname or username to be posted. Facebook and MySpace also ask for education or employment details, which Bebo does not for public access.

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Fergal O'Byrne,
Chief Executive,
Irish Internet
Association

IJA congress reviews social networking

Social networking is this year's theme for the Irish internet sector's flagship event – the Irish Internet Association (IJA) annual congress scheduled for May.

Beyond websites: business uses of social networking and new media is the theme of the event and a first-class panel of international and national

speakers has been secured. The IJA congress will get behind the hype of social networks and focus on their real business issues, such as how they can be used as a business tool.

Building on the success of previous sell-out congresses, this year's event offers a new

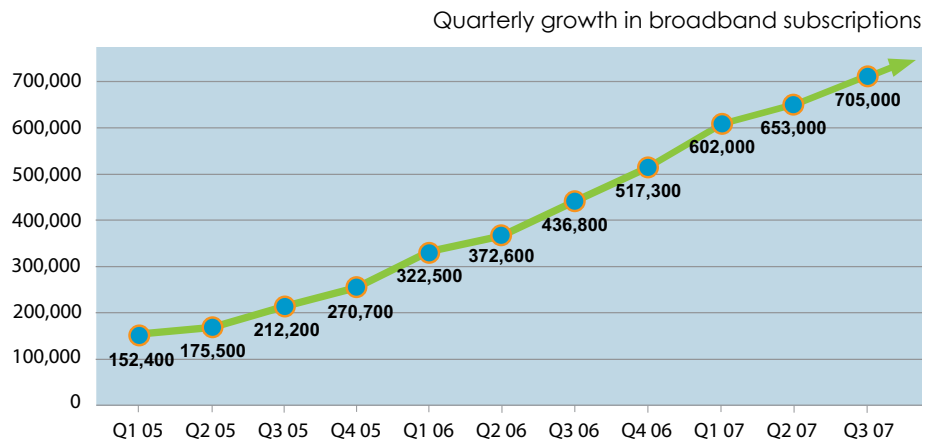
feature where delegates can access confidential advice on their online strategy. The Web Strategy Clinics offers 30-minute slots with industry experts.

The IJA Congress is being held on 15 May in the Croke Park Conference Centre in Dublin. For more details or to book your place, go to www.ija.ie

1. Broadband

Irish broadband subscriptions rose by 52,000 in the third quarter of 2007, an 8% jump on the previous quarter. This 705,000 figure does not include mobile broadband, figures for which ComReg first issued estimates in mid-2007. Mobile broadband use almost doubled from 45,000 to 88,000 in the quarter, according to the estimates from the telecoms regulator. ComReg also reported that Ireland had the highest growth rate for broadband in the OECD in the year to June 2007.

Source: Broadband growth: ComReg Quarterly Key Data Report, December 2007



2. Online advertising

	2007	2008
Online spend	€35m	€55m
% of total ad spend	2.5%	3.6%

Source: iReach. ie: 'Study of Online Advertising in Ireland'

Irish online advertising is lagging far behind the UK, according to a recent report by iReach.ie. Online advertising still only accounts for an estimated 2.5% of media spend budgets – less than a quarter of the figure in the UK. The internet research firm estimated the total 2007 online advertising spend in Ireland at €35 million, but expects that figure to grow to €55 million this year. That would represent 3.6% of the expected €1.5 billion spend.

3. Top Google movers

Last-minute shopping trips and traditional baking were increasingly on the minds of Irish surfers in December 2007, according to recent figures from search engine Google.

The phrase "flights to new york" topped the online search engine's Irish gaining queries that month, closely followed by "christmas cake". Paying for such frivolities

probably accounts for the third most popular – "paddy power" – while other regularly-searched items include "broadband ireland" and "pregnancy" and "driving test" also crop up.

"Gaining queries" are those keywords whose popularity has increased the most in comparison with the previous month.

Source: Google Zeitgeist Around The World (latest survey December 2007)

Top Gaining Queries: Ireland - December 2007

1.	flights to new york
2.	christmas cake
3.	paddy power
4.	bmw
5.	www.drivingtest.ie
6.	broadband ireland
7.	pregnancy week by week
8.	heather graham
9.	godfathers pizza
10.	tivoli

Top Trends

4. Internet usage

Ireland is still among the "colder" regions of Europe when it comes to internet use – EU countries where less than 60% of adults have used the internet in the past three months (see map). The other "nippy" areas on this internet weather map are the Mediterranean and Eastern Europe.

But those who do go on the Internet in Ireland are more enthusiastic and trusting online shoppers than the average European, according to new research from Eurostat.

One third of Irish people aged 16-74 shopped online in the last three months, compared to an EU average of 30% (see table below). But just 3% of Irish people avoided e-Shopping because of concerns over security, compared with 12% of Europeans overall. The Spanish and Finns were most wary, 27% and 26% respectively avoiding online shops.

Meanwhile Irish users are just below the average compared with other EU citizens when it comes to banking online.

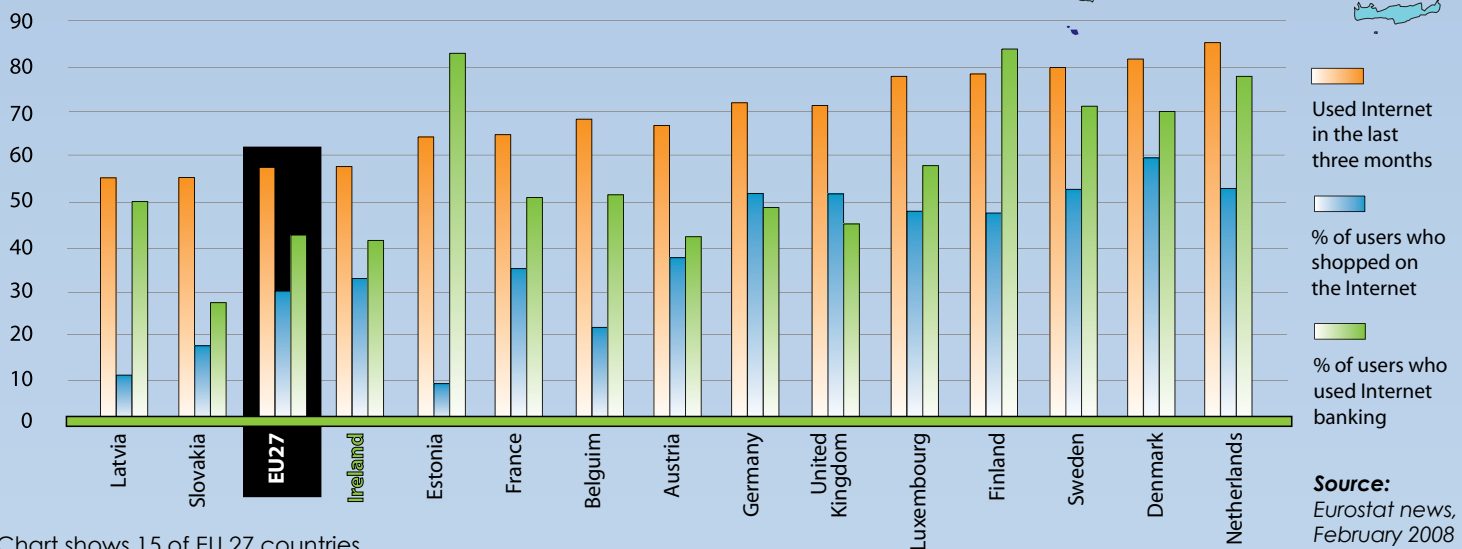
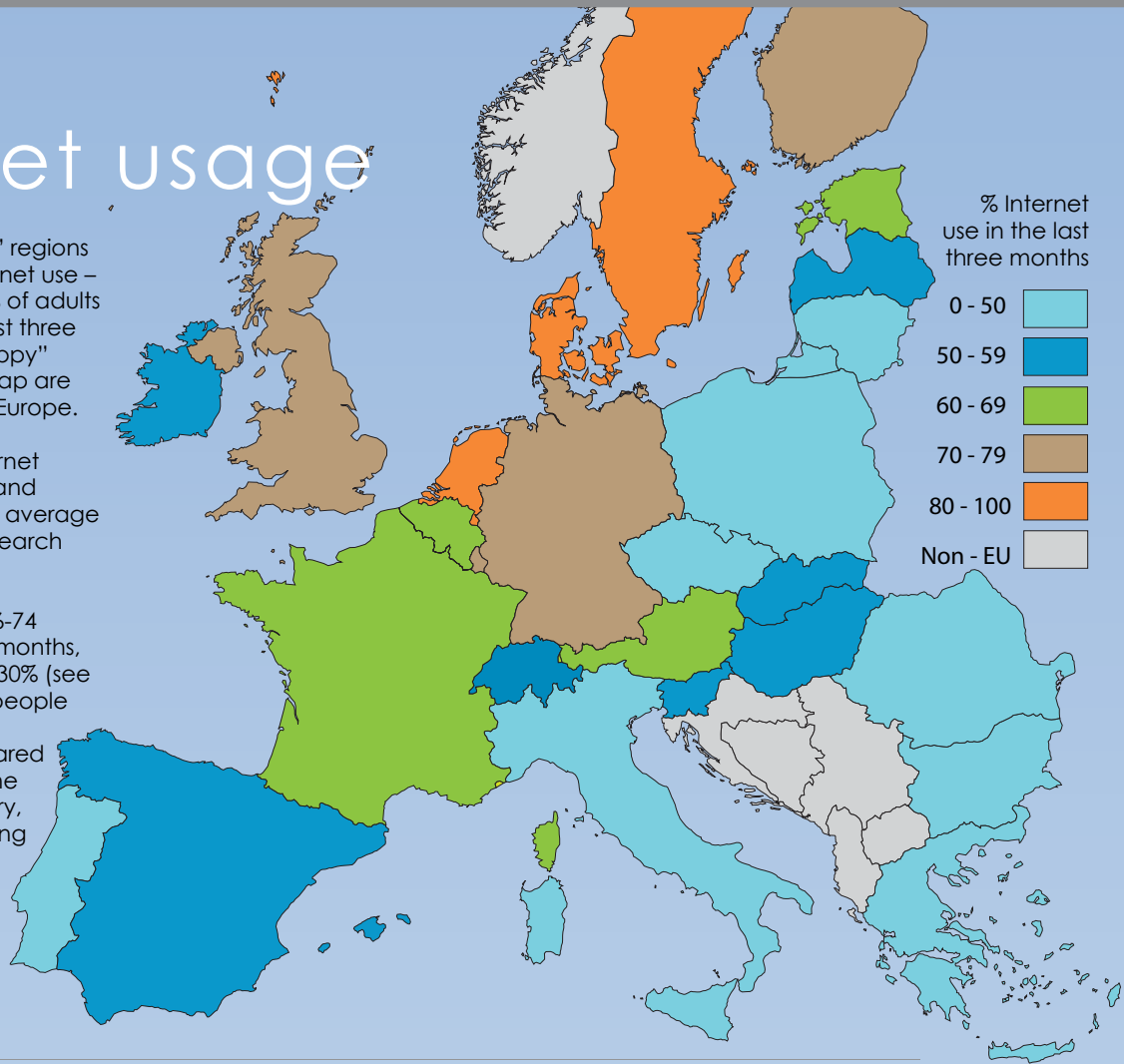
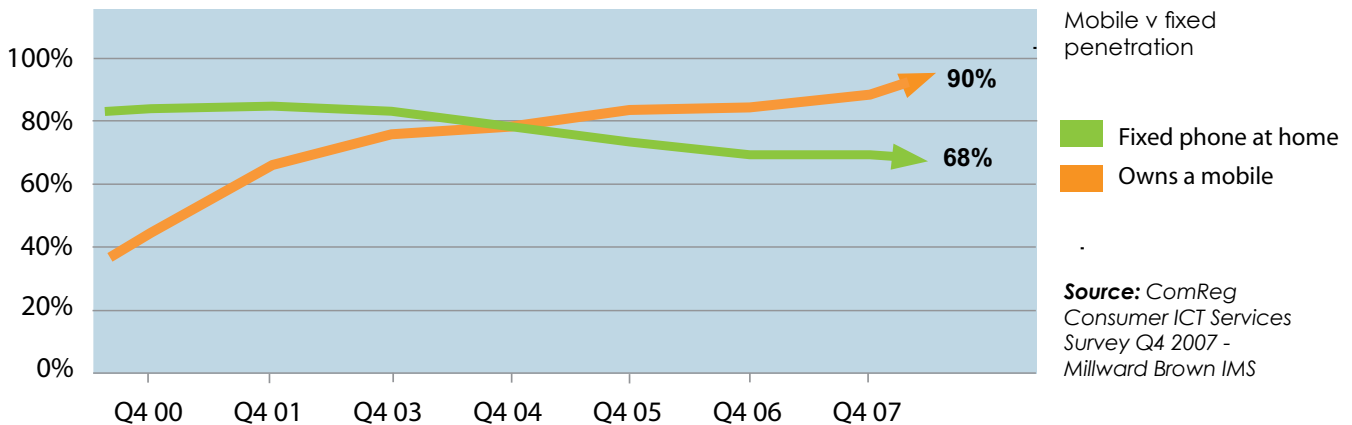


Chart shows 15 of EU 27 countries.

Source: Eurostat news, February 2008

the opportunity to win online

5. Mobiles dominate

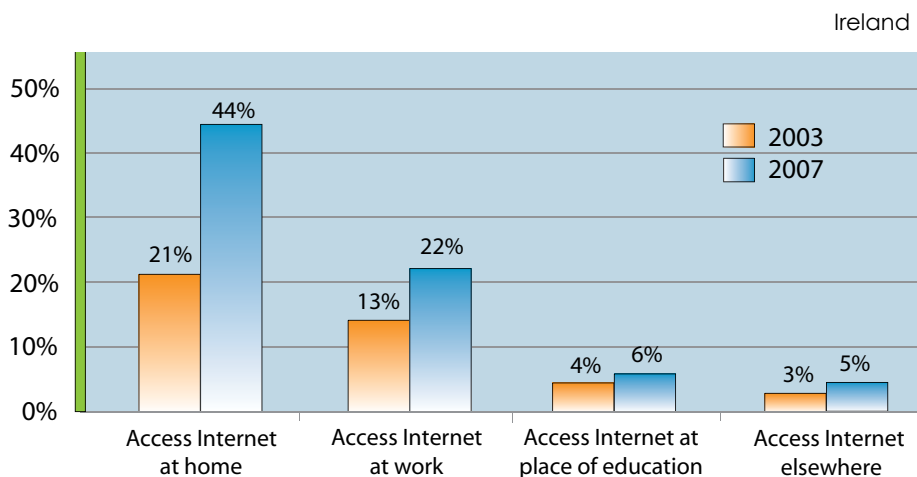


The mobile phone continues to extend its lead over fixed lines, as the latest ComReg data shows. The same study indicates that dominance of the fixed line market has translated into a strong lead in Internet access services.

Eircom has 57% of the home internet service provider market nationally (but only 40% in Dublin). Eircom's national share declined sharply from 78% a year earlier, with BT (now 7%), Irish Broadband (8%), Clearwire

(3%) and Perlico (6%) among those making gains in the home market. Also establishing a presence in home internet connectivity are... the mobile companies O2 (2%), 3 (2%) and Vodafone (1%).

6. Internet access



Internet usage at home has doubled in the last three years, according to new research released by Eurostat. The proportion of individuals aged 16 to 74 who used the Internet at home in the last three months has risen from 22% in 2004 to 44% last year. That figure is just below the EU average of 47%.

Those who access the Web at work (other than home) are now 22% of users, up from 13% in 2003 but a slight drop on 2006. The EU average is 25%.

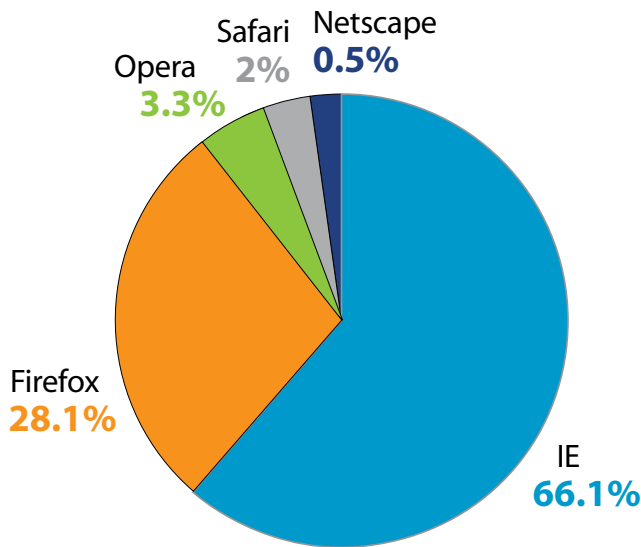
Places of education account for 6% of users, a fall on 2006 and a marginal rise since the survey began here in 2003.

Individuals who access the Internet at places other than home or work have risen from 3% to 5% over the period of the survey.

Source: Eurostat reports: Individuals who accessed Internet at place of education; Individuals who accessed Internet at home; Individuals who accessed Internet at place of work (other than home); Individuals who accessed Internet at other places

Top Trends

Share of browser use in Europe



7. Rise and rise of Firefox

Irish surfers are taking to Mozilla Firefox in ever-increasing numbers, according to new research by French firm XiTi Monitor. Almost one third of Irish web users now use the Firefox web browser, a situation replicated across much of Europe where Firefox is now used by 28.1% of surfers. XiTi said the market share of the open-source browser had risen by 20% over the year 2007.

The highest proportion of Firefox users is found in Finland, where it is used by 46% of surfers, while 45% of Slovenes and 42% of Poles also opt for it. In Ireland 29.6% have signed up but the UK figure of 17% is likely to rise now the BBC has decided to make its on-demand TV application iPlayer compatible with it.

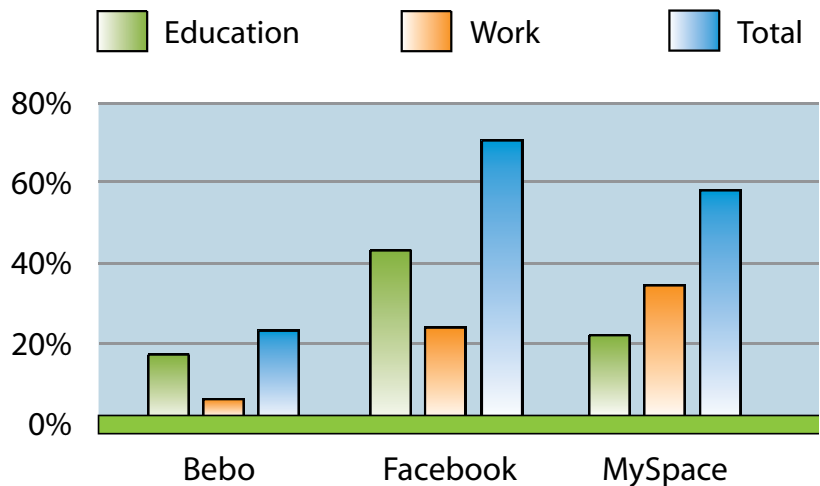
Source: XiTi Monitor, SiliconRepublic.com, bit-tech.net, Net Applications

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A significant minority of users are apparently oblivious to the fact that their pages could be accessed by employers or potential employers. Four users wrote about taking drugs, while 11 Bebo users detailed their drinking habits, as did six each on Facebook and MySpace. Others revealed racist and homophobic attitudes.

AMAS's research comes on foot of growing concerns about identity theft and vigilance. Launching the makeItSecure campaign in February 2008, the Minister for Communications, Energy and Natural Resources, Eamon Ryan, identified security as a key issue with social networking. Eight out of 10 adults now give advice to children about online security while 68% are monitoring their children's online usage, according to research for the makeItSecure campaign.

Percentage of Irish users who reveal their place of work or education



Source: AMAS social network research, February 2008

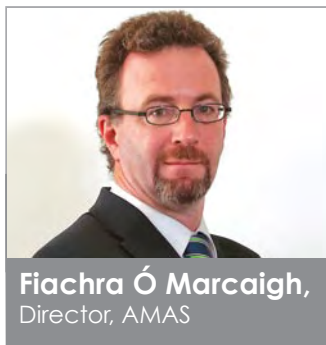
The AMAS survey was conducted in February 2008 and involved a review of 100 random profiles each on Bebo, MySpace and Facebook and identifying whether users had listed names, addresses, telephone numbers, age, date of birth, work or school related details and other personal details.

All change is pattern of online life

The expression that change is the only constant may go back to Heraclitus of Ephesus (who stopped noticing change back in 475 BC) but it is truer than ever today, and nowhere more clearly so than online.

This issue of State of the Net contains some striking statistics illustrating and confirming major change.

One is the evidence that the telephone is now definitely mobile. Substantially more people now own a mobile phone than have a fixed line phone in their homes. The upward curve of mobile and the downward curve of the POTS (plain old telephone system) crossed back in 2004 and continued to diverge.



Fiachra Ó Marcaigh,
Director, AMAS

Another is that Firefox has captured a very substantial share of the browser business in Europe. It has overcome the near-total dominance of Internet Explorer a few years ago and is now heading for one-third market share.

But none of this should surprise us. The position that Internet

Explorer is defending was once held by Netscape's web browser. Netscape - a name that was as familiar to Web users in the late 1990s as Google is today - has shrunk to a minuscule market share.

In fact, Netscape may disappear completely, apart from a handful of enthusiasts who keep a copy in working order like a 1940s car and bring it for a spin every now and again.

These trends - mobile and Firefox - are well established and the statistics are the stamp of confirmation on what we already know.

What is much more interesting is the implication for other

technologies covered in State of the Net. The rapid rise of social networking and user-generated content as the pastimes of choice for a generation of Irish young people surprised many people and shocked some over the past three years.

However, even as it happened, it was clear that this dominance would not last forever. There are so many possibilities inherent in the online world that it is inevitable another communications phenomenon will come forward to challenge, and quite possibly replace, the online social networks. Or as a child of the future will almost definitely put it: "Bebo, what was that Dad?"

AMAS report highlights threats and opportunities for tourism

A major research study on how tourism businesses have been affected by the Internet has been completed by AMAS. The study was commissioned by the Irish Tourist Industry Confederation (ITIC), the representative body for the Irish tourism sector and arose from concerns about the impact of the Internet on smaller tourism businesses.

AMAS's work programme involved interviews with key players in Irish tourism, an industry survey, an international benchmarking exercise and other forms of research. The study made a total of 25 recommendations, for tourism businesses themselves, industry bodies, the Department of Arts, Sports and Tourism and the State tourism bodies.

ITIC Chief Executive Eamonn



McKeon said the study produced "superb analysis and practical solutions". He described the AMAS team as "great people to work with and excellent listeners".

This is the latest in a series of projects AMAS has conducted for the tourism and travel sector. AMAS has been engaged on strategy and research

AMAS: what we do

AMAS is a consultancy specialising in online channels. The company is retained by businesses and government bodies to plan, manage, evaluate and market their online channels. Services include:

- Strategy
- Research
- Audits
- Content
- Marketing
- Project management
- Outsourcing

Find out what AMAS can do for you. Contact Aileen O'Toole, Managing Director, on + 353 1 6610499 or info@amas.ie.

assignments for Aerlingus.com, Town and Country Homes, the representative body for the B&B sector, Tourism Ireland, O'Mara Travel and the Irish Tour Operators Association. In December, AMAS Managing Director Aileen O'Toole addressed an EU eBusiness conference in Oslo on how Ireland as a tourist destination is being marketed online.