

Internet R.I.P.

A history of the web in three slides
(and a few more on why it's dead)

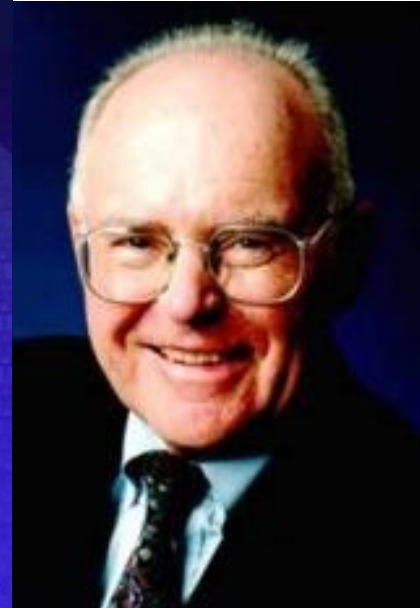
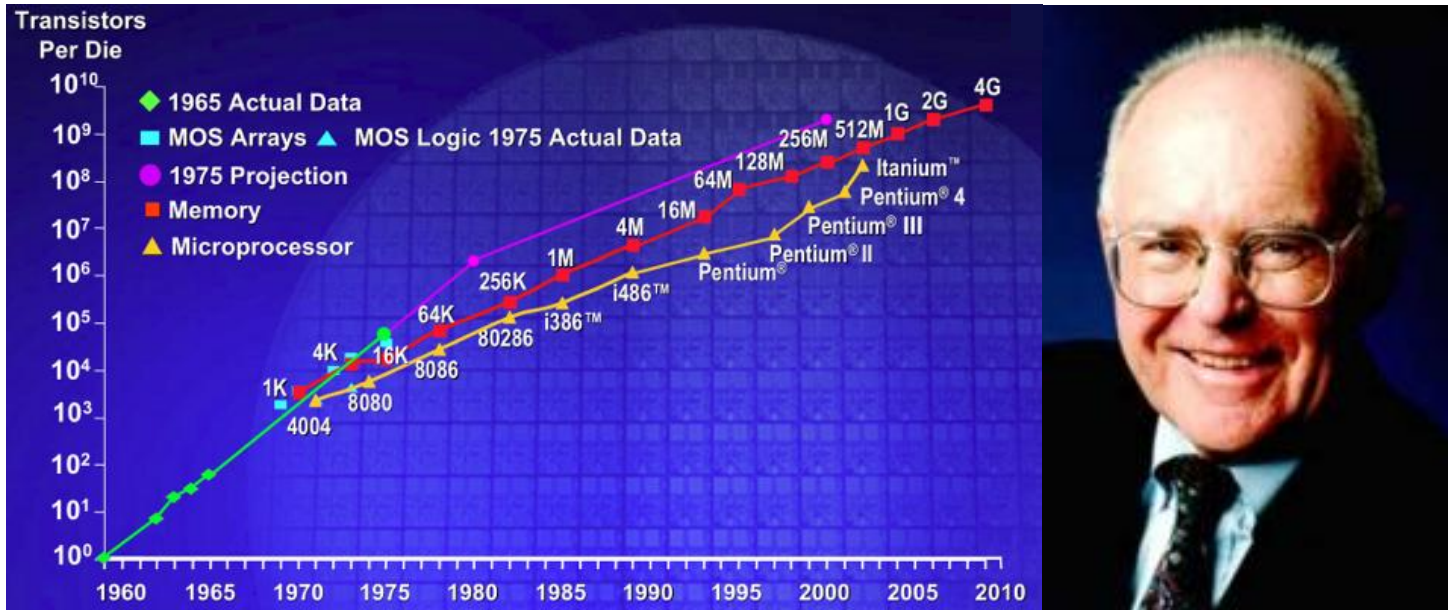
September 2012

nucleus

transforming brand horizons

A history of the Web in three slides

we live in a digital age, where the velocity of change is exponential



1965 – Moore's Law

2005 – Butters' Law

A history of the Web in three slides
three stages

1994-2004 – Internet 1.0



2004-2010 – Internet 2.0



2011-2015 – Mobile Era



A history of the Web in three slides
the fourth stage?

1994-2004 – Internet 1.0



2004-2010 – Internet 2.0



2011-2015 – Mobile Era



2015-2018 – Connected Era



A history of the Web in three slides

the web has been entirely consistent with the world of computing

Wave 1: Mainframes 

Wave 2: Mini computing 

Wave 3: Workstations  

Wave 4: The PC 

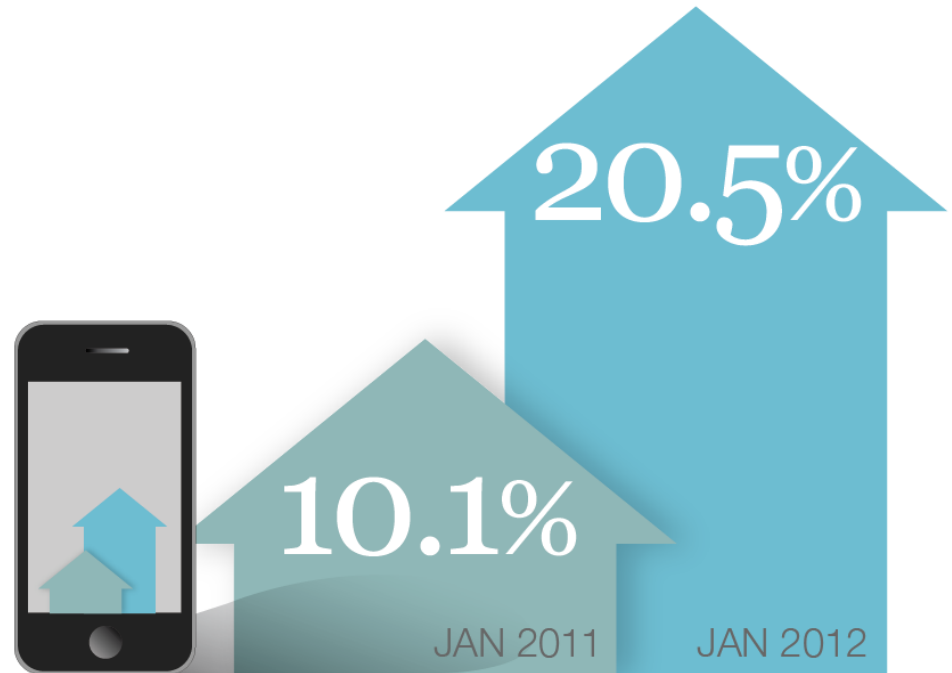
Wave 5: Mobile computing  

A history of the web in three slides
where do we go from here...

So what does this all mean for travel?

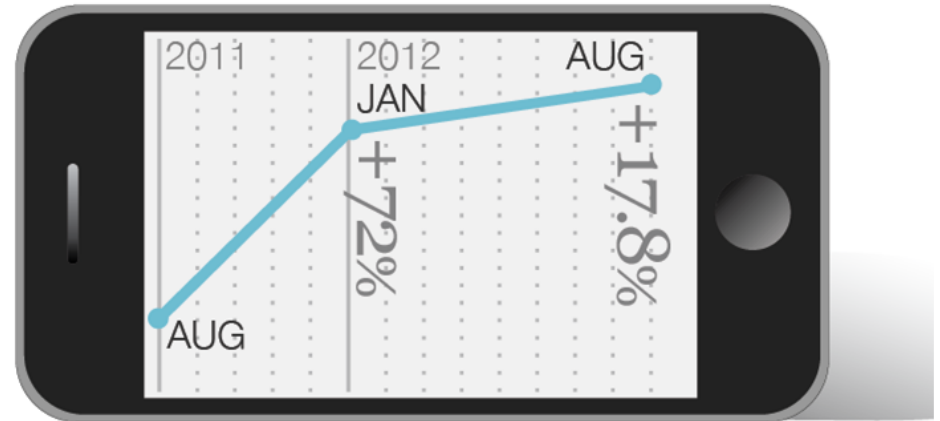
Witnessing the birth of the Mobile era
mobile web browsing growing fast...

Mobile browsing
of travel websites
**more than
doubled** in the
past 12 months to
an **average 20.5%**
of all traffic
surveyed



Witnessing the birth of the Mobile era
mobile web browsing growing fast...

Rate of **penetration**
slowing, but still up
17.8% since
January 2012



Witnessing the birth of the Mobile era
mobile web browsing growing fast...

**iOS devices
continue to
dominate**
maintaining an
84.9% share of
mobile browsing
devices compared
with 85.6% six
months earlier



Witnessing the birth of the Mobile era
mobile web browsing growing fast...

**Today's iPhone 5
launch** likely to
reinforce iOS's
dominant position



Witnessing the birth of the Mobile era
mobile web browsing growing fast...

**Android makes
no further gains,
steady at 8%
penetration**



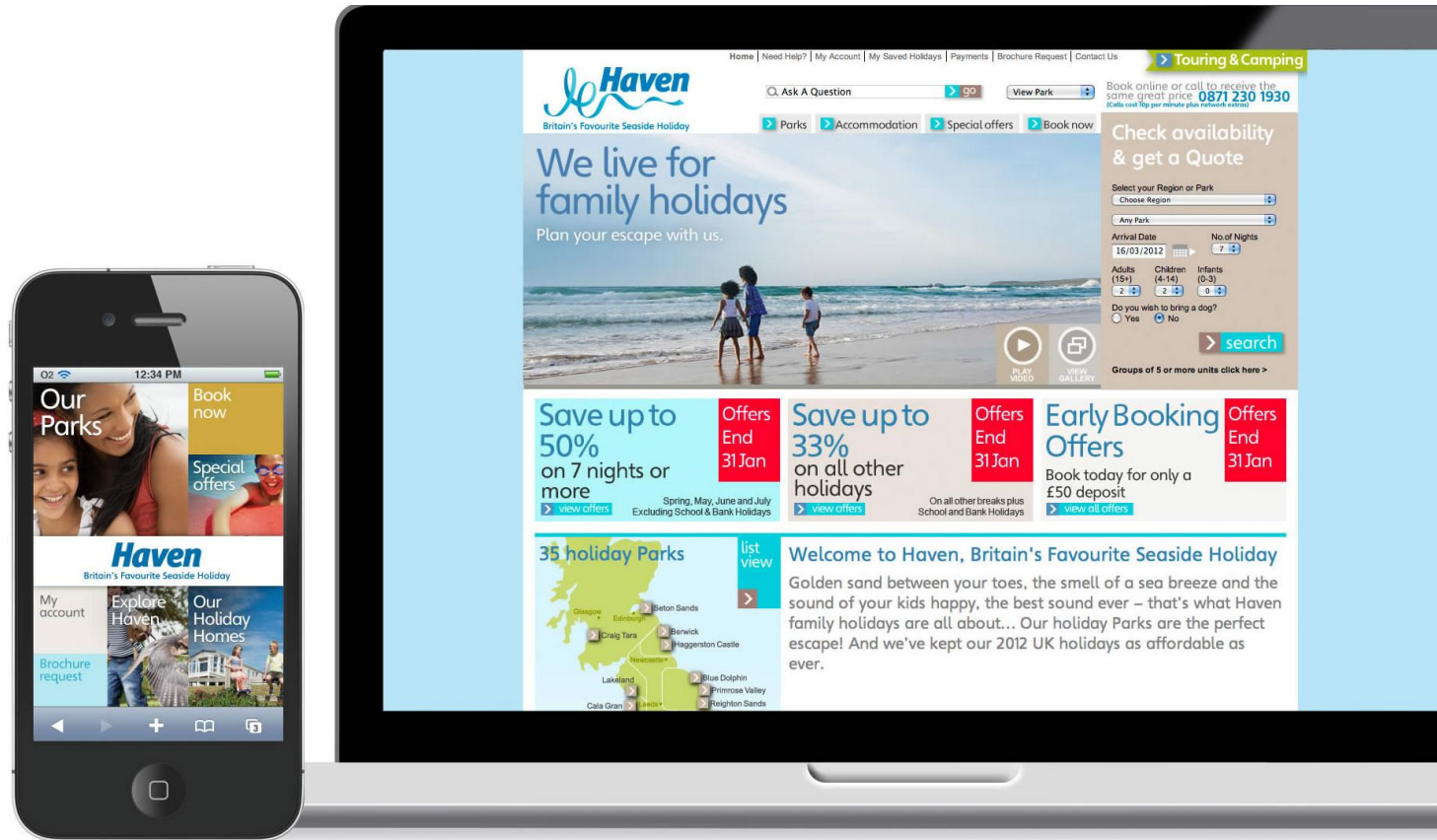
Witnessing the birth of the Mobile era
mobile web browsing growing fast...

Luxury sites on
track for >30%
mobile traffic by
end-2012



*Apologies to Christian Louboutin

Witnessing the birth of the Mobile era
 what to do...



Without a compelling mcommerce website,
 2013 will be a very difficult year...

Creating and protecting intellectual property

Conclusions

You must, must, **must** support mcommerce

The tipping point is close

By end 2014 >50% of all web browsing will be via mobile devices

By then, another paradigm shift will then be on the horizon...

Thank you.

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