

5 Internet and online content

UK Communications Market Report 2015

Figure 5.1

UK internet and web-based content market: key statistics

UK internet and web-based content market	2009	2010	2011	2012	2013	2014	2015
¹ Internet take-up (%)	73	75	77	79	80	82	85
¹ Internet on mobile-phone take-up (%)	20	21	32	39	49	57	61
² Monthly active audience on laptop/desktop computers	38.6m	43.1m	42.2m	43.6m	44.6m	45.1m	n/a
² Time spent web browsing per laptop/desktop internet user per month (hours)	29.4	30.9	31.5	34.7	34.2	29.8	n/a
³ Digital advertising expenditure (£)	3.6bn	4.1bn	4.8bn	5.4bn	6.3bn	7.2bn	n/a
³ Mobile advertising revenue (£)	38m	83m	203m	529m	1021m	1625m	n/a

Note: With the exception of internet, and internet on mobile phone, take-up data, all data relate to the calendar year, meaning that 2015 data are currently unavailable.

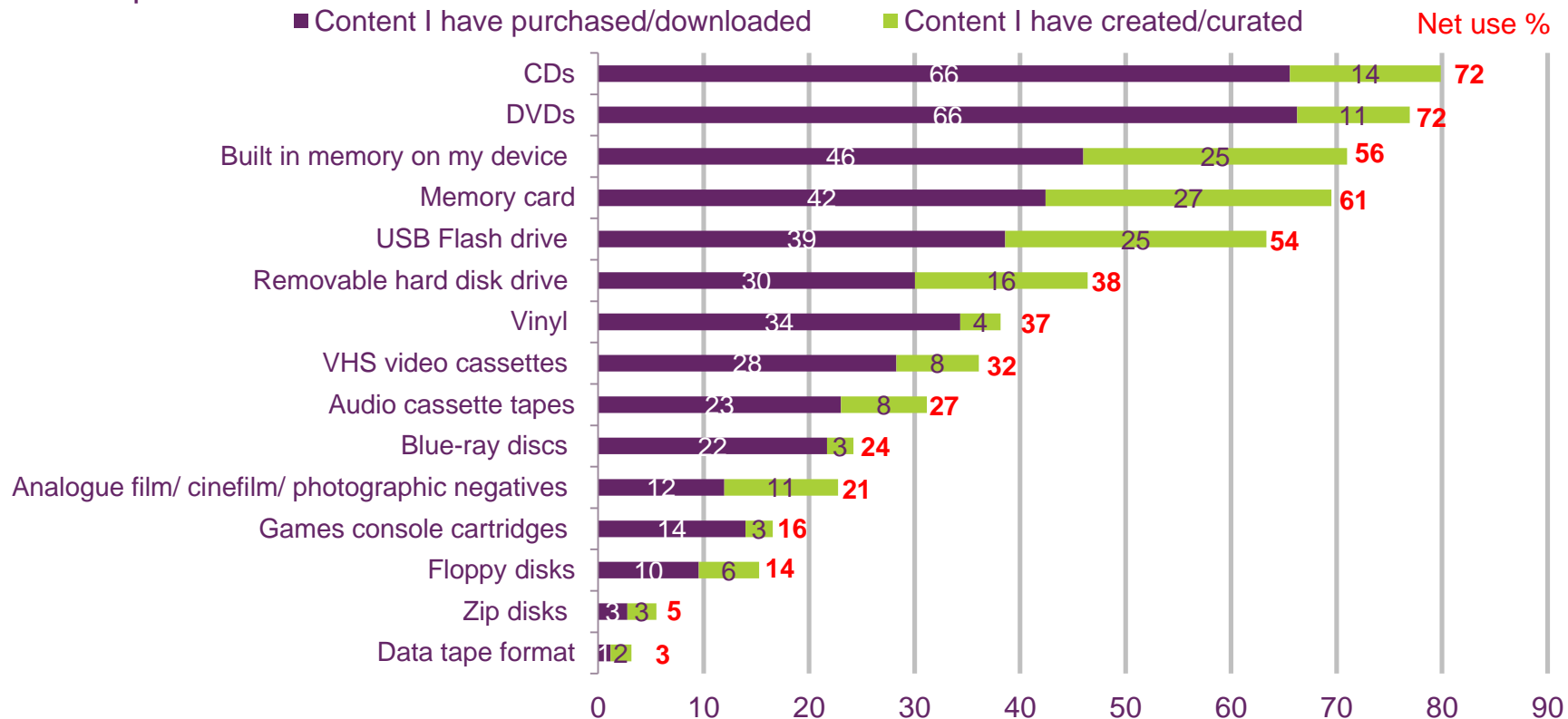
Source: ¹Ofcom consumer research, Q1 each year (2009-2013), then Wave 1 (2014&2015) ²comScore MMX, UK, annual average from reported monthly values; ³IAB/PwC Digital Adspend Study 2009-2014.

Note: Caution is advised in comparing values before and after February 2011 because of a change in comScore methodology.

Figure 5.2

Physical storage formats used at home

% of respondents



Source: YouGov, Attitudes Towards Technology 2015, April 2015 Base: Online UK adults 16+ (2147)

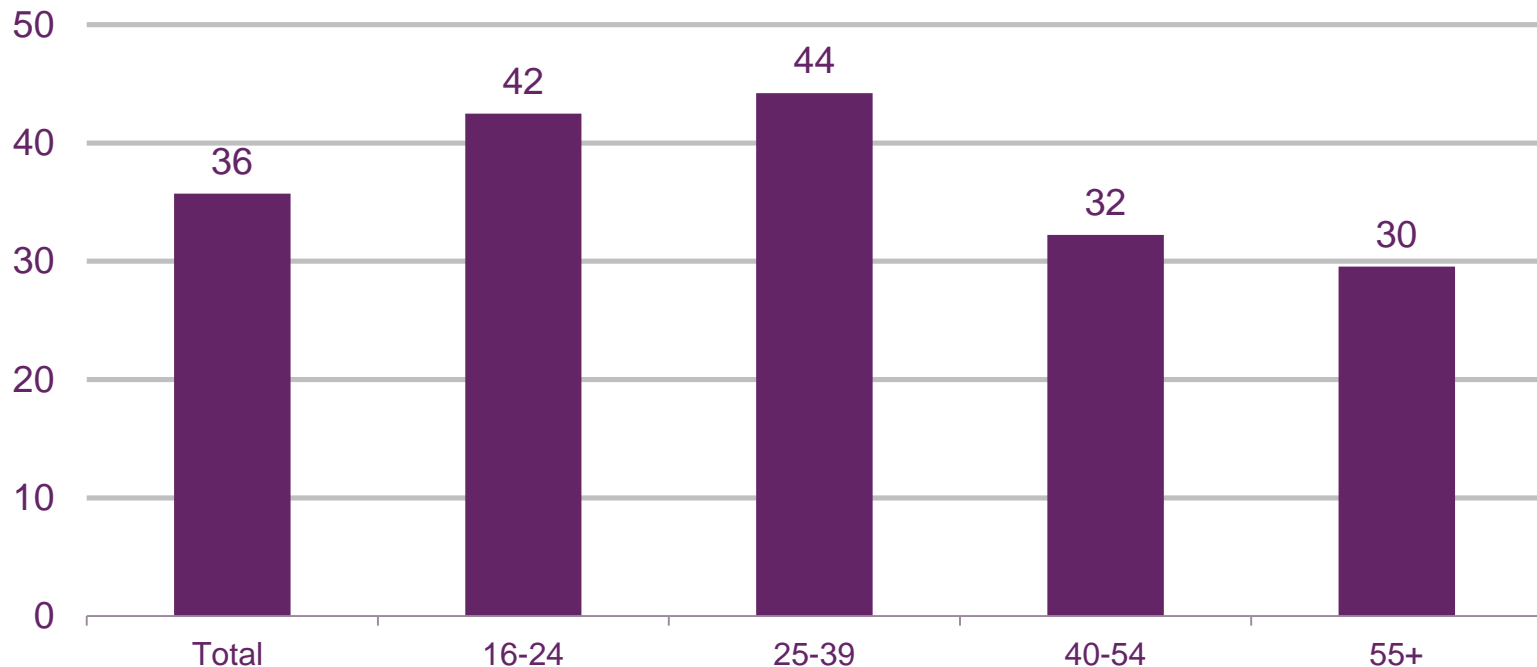
Q31. Which of the following do you have at home? Please choose all that apply.

Note: 'Net use' refers to use for purchased/ downloaded content and/or created/ curated content. The sum of the people who use a particular physical media for content they have purchased, and the proportion who use it for content they have created/curated, double-counts the proportion who do both, and hence the net-use figure reported above is lower.

Figure 5.3

Use of online storage service

% of respondents who answered 'yes' when asked if use online data storage services



Source: YouGov, Attitudes Towards Technology 2015

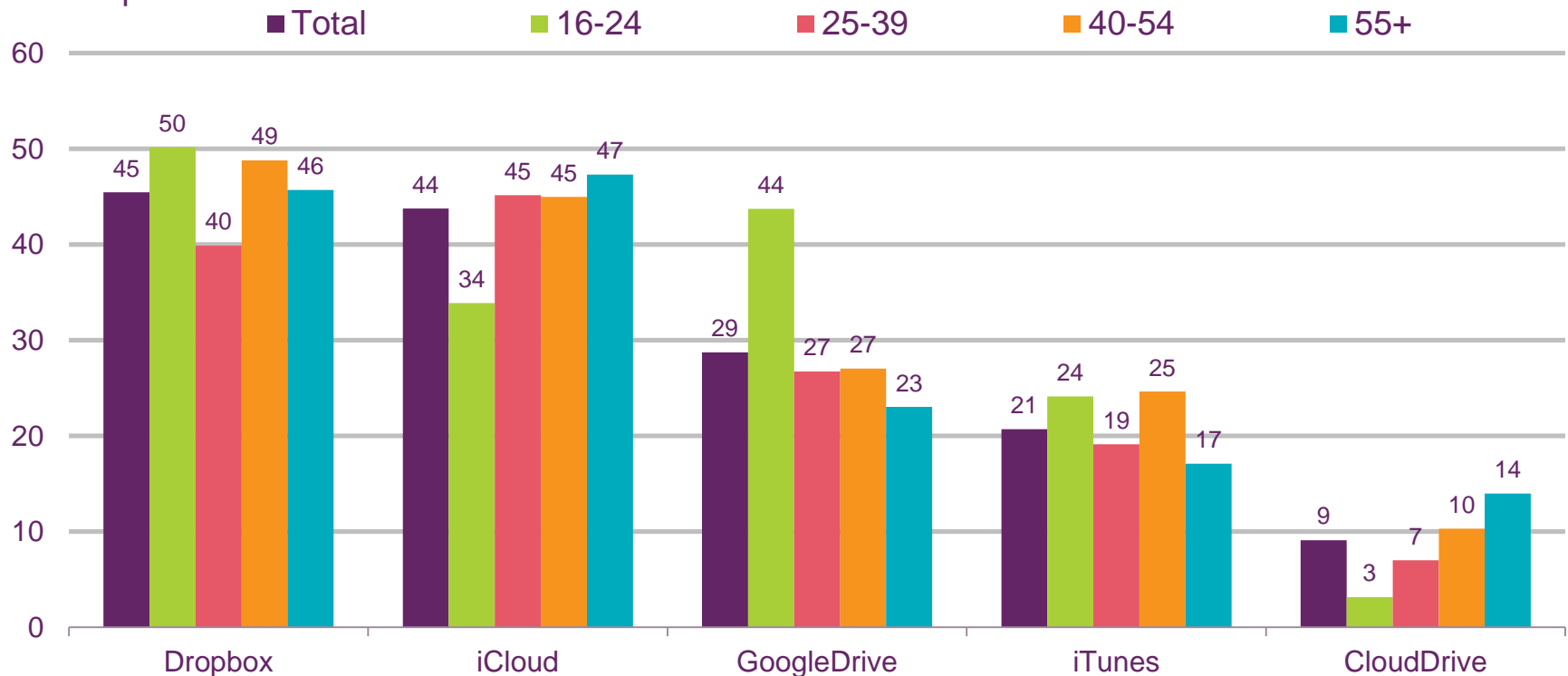
Base: Online UK adults 16+ (2147), 16 – 24 (279), 25 – 39 (384), 40 – 54 (554), 55+ (930) Q26.

Q.26 Do you use online data storage services, such as Dropbox, iCloud or Google Drive for your personal needs?

Figure 5.4

Claimed use of selected online storage services

% of respondents



Source: YouGov, Attitudes Towards Technology 2015

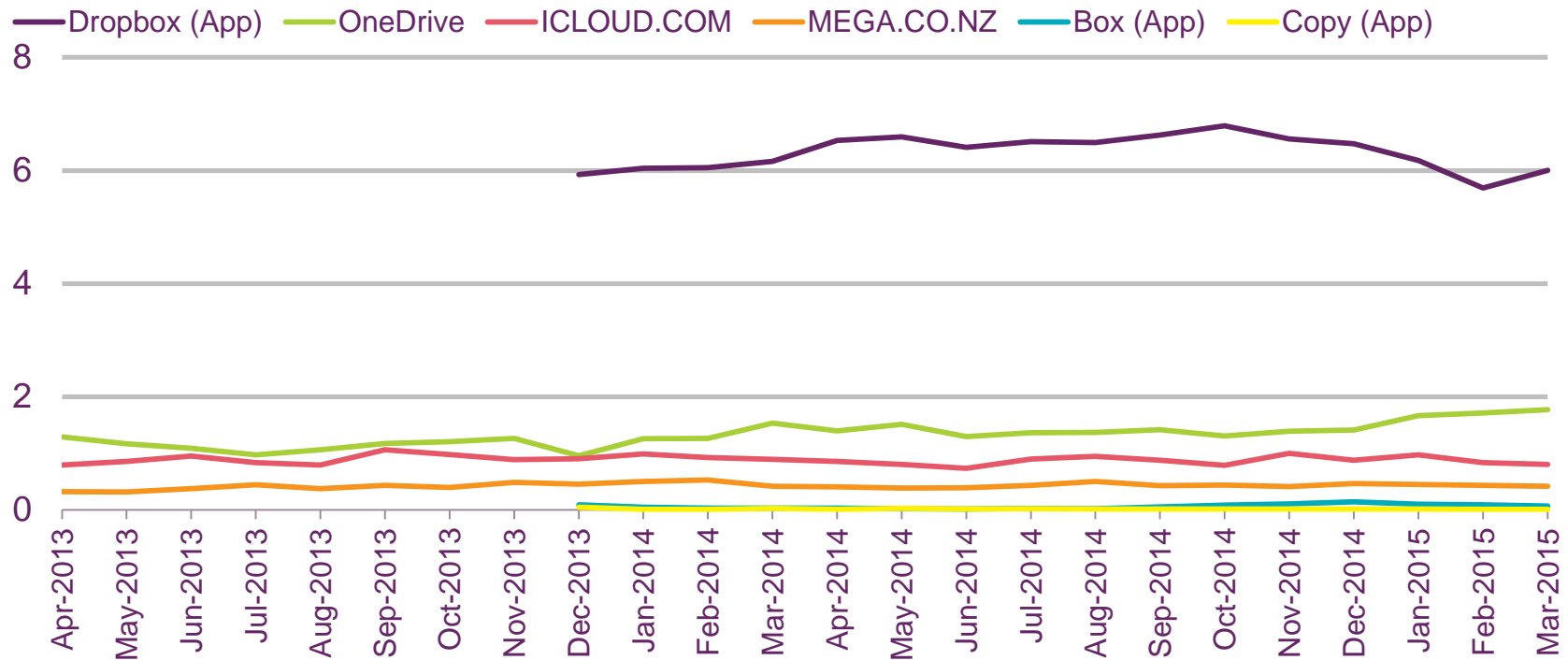
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

q29. Which of the following online storage services, if any, do you use for your personal needs?

Figure 5.5

Use of selected online storage services on desktop and laptop computers

Unique audience (millions)

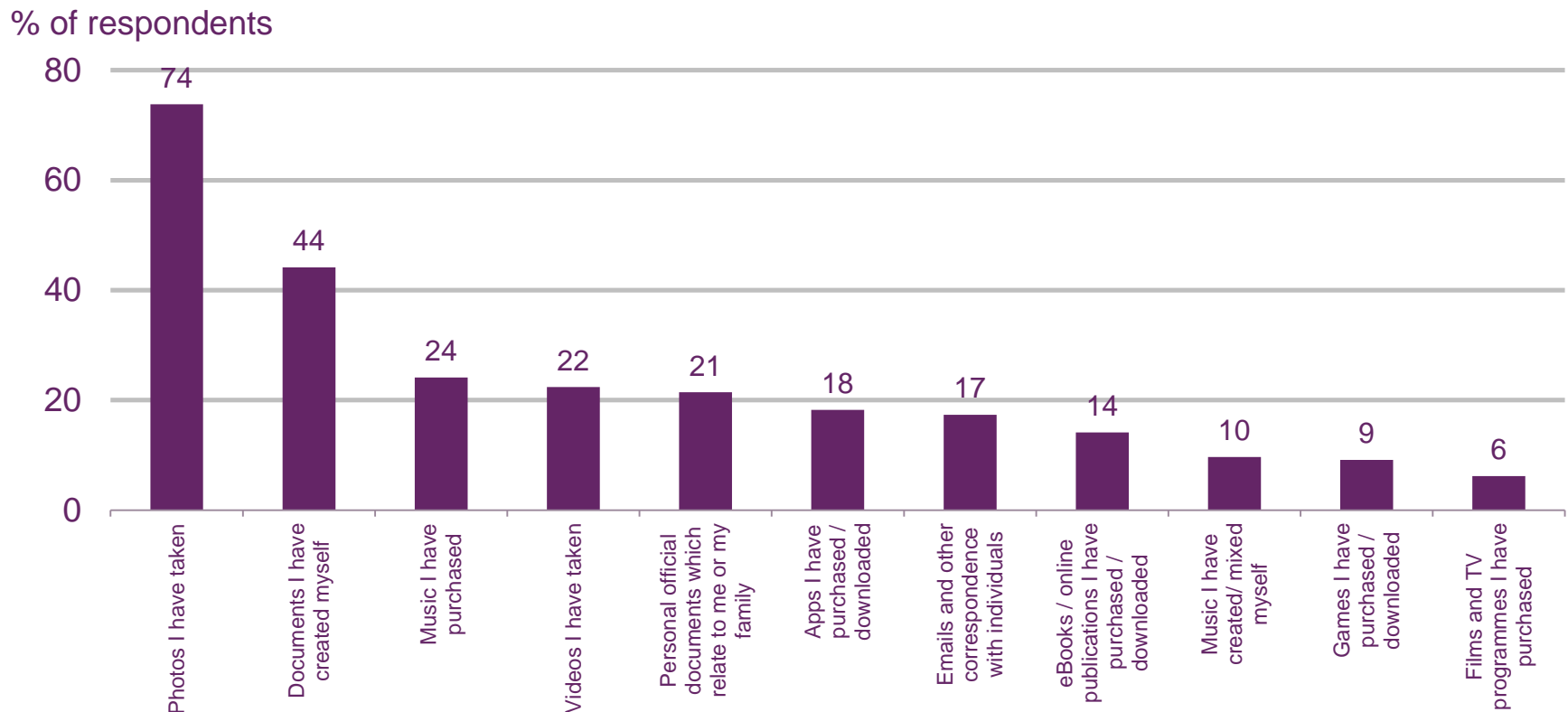


Source: comScore MMX, UK, home and work panel, April 2013 to March 2015

Entities reported in MMX: Dropbox (App) [M], OneDrive [C], ICLOUD.COM [P], MEGA.CO.NZ [P], Box (App) [M], Copy (App) [M]. Note: Services may include other websites and apps e.g. for mobile uploads, apart from those identified above.

Figure 5.6

Types of content stored on online storage services



Source: YouGov, Attitudes Towards Technology 2015

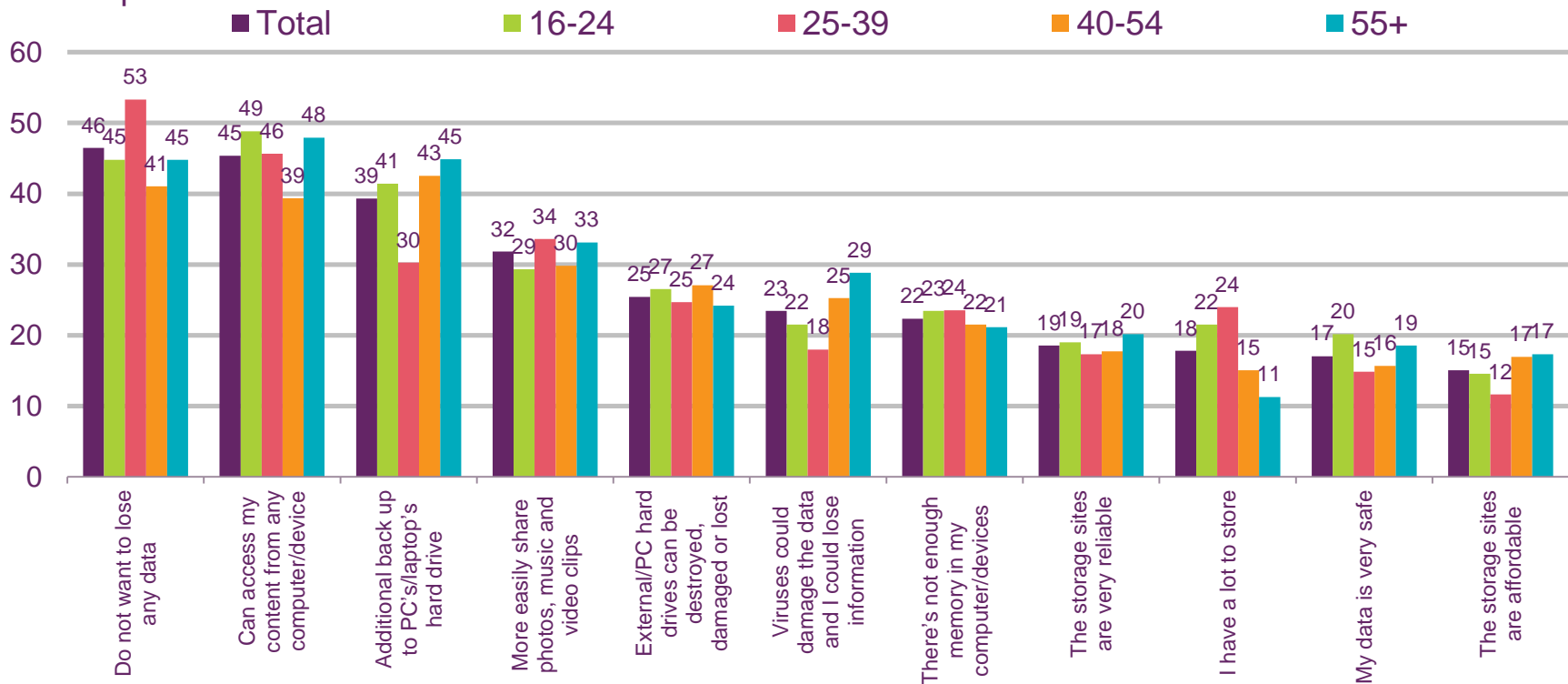
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

Q27. What types of content/media do you use online data storage for?

Figure 5.7

Reasons for using online data storage

% of respondents



Source: YouGov, Attitudes Towards Technology 2015, April 2015

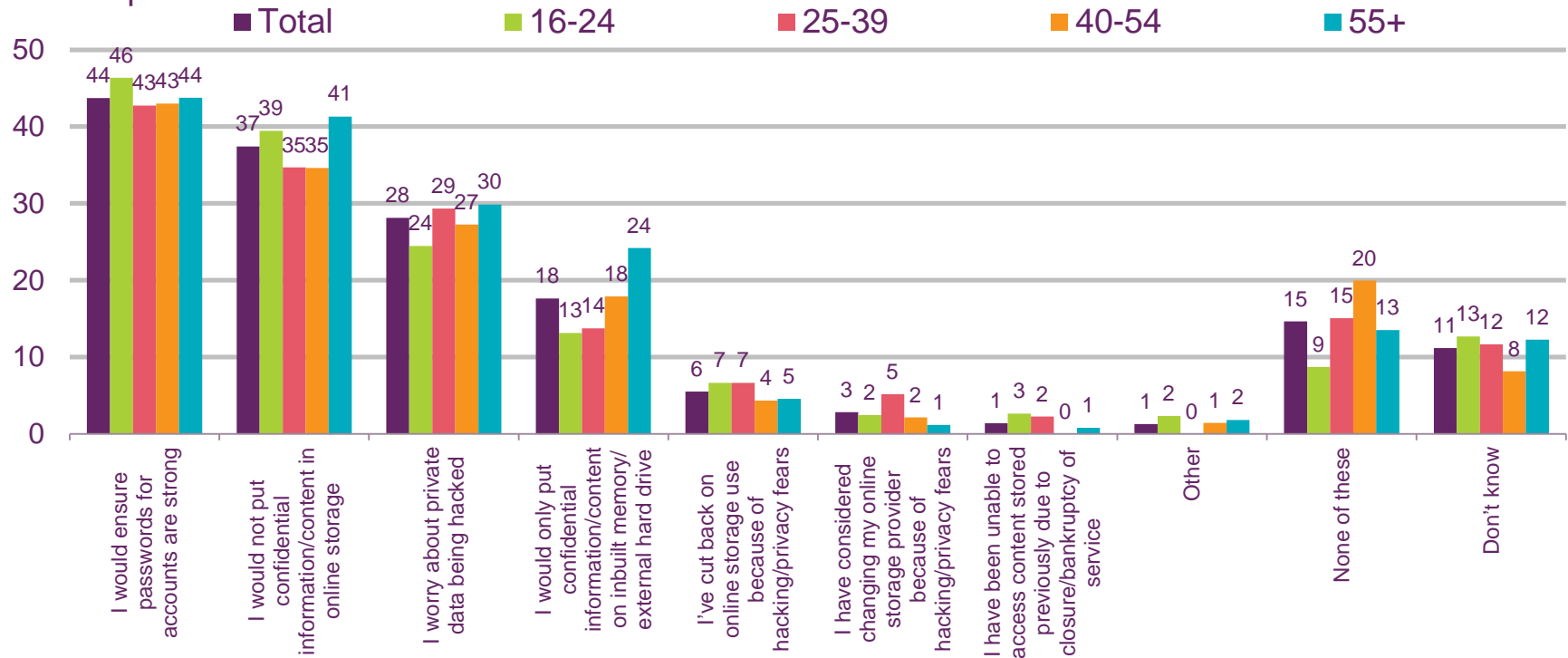
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

q34. Thinking about why you use online storage, which of the following statements, if any, apply to you?

Figure 5.8

Concerns about online storage

% of respondents



Source: YouGov, Attitudes Towards Technology 2015

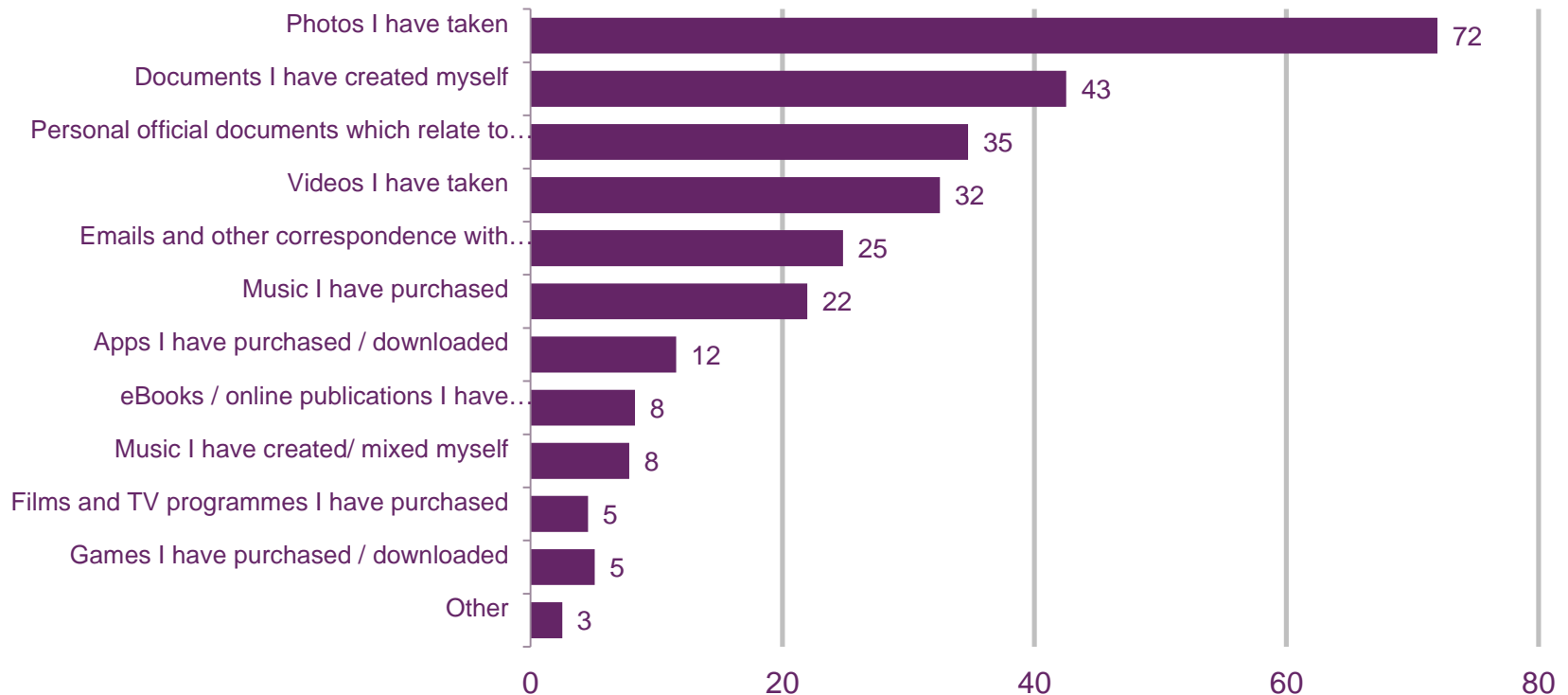
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

q36. Now thinking about levels of trust of online storage, which of the following statements, if any, apply to you?

Figure 5.9

Importance of keeping content

% of respondents ranking content type as 1st, 2nd or 3rd most important out of 12



Source: YouGov, Attitudes Towards Technology 2015

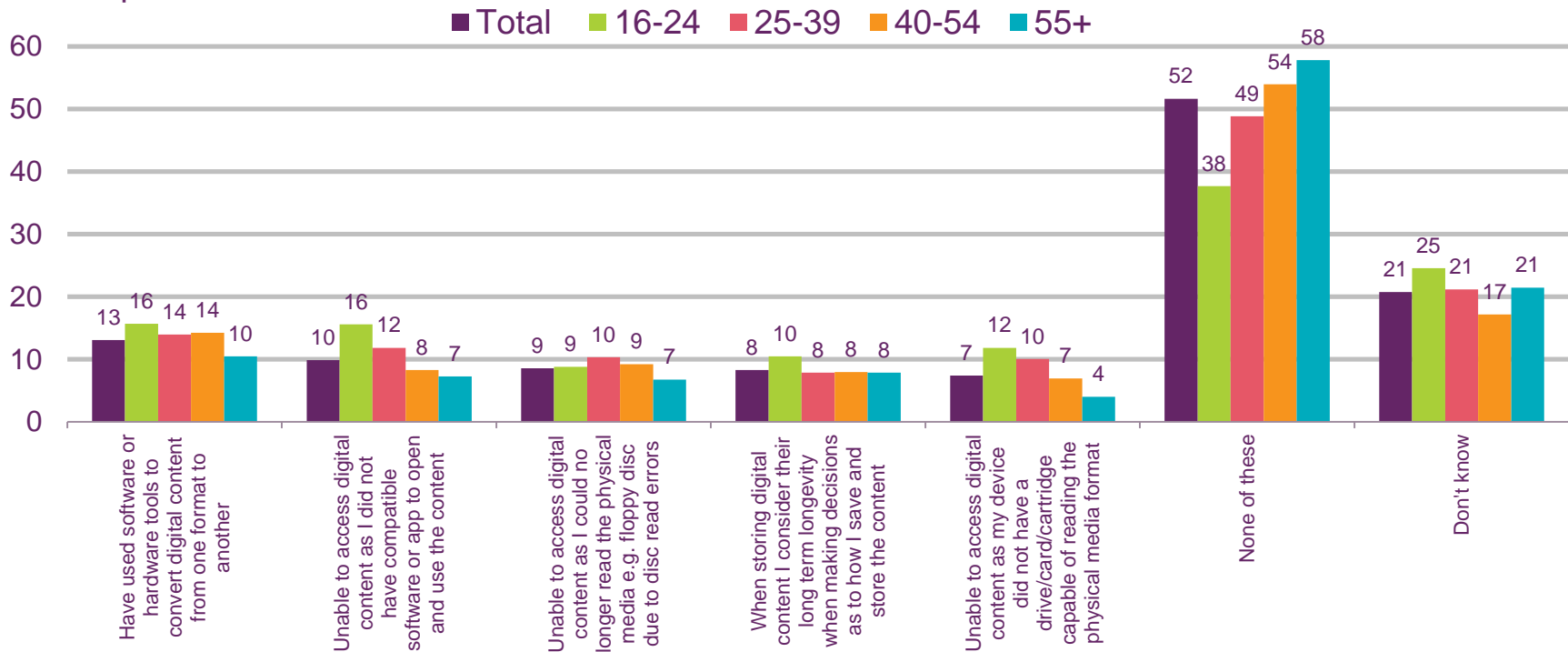
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

q28_6. Thinking about the types of media that you would like to save or keep, which of the following are the most important to you? Please rank them in order, with the most important first. 1 being most important and 10 being least important.

Figure 5.10

Digital preservation challenges and awareness

% of respondents



Source: YouGov, Attitudes Towards Technology 2015

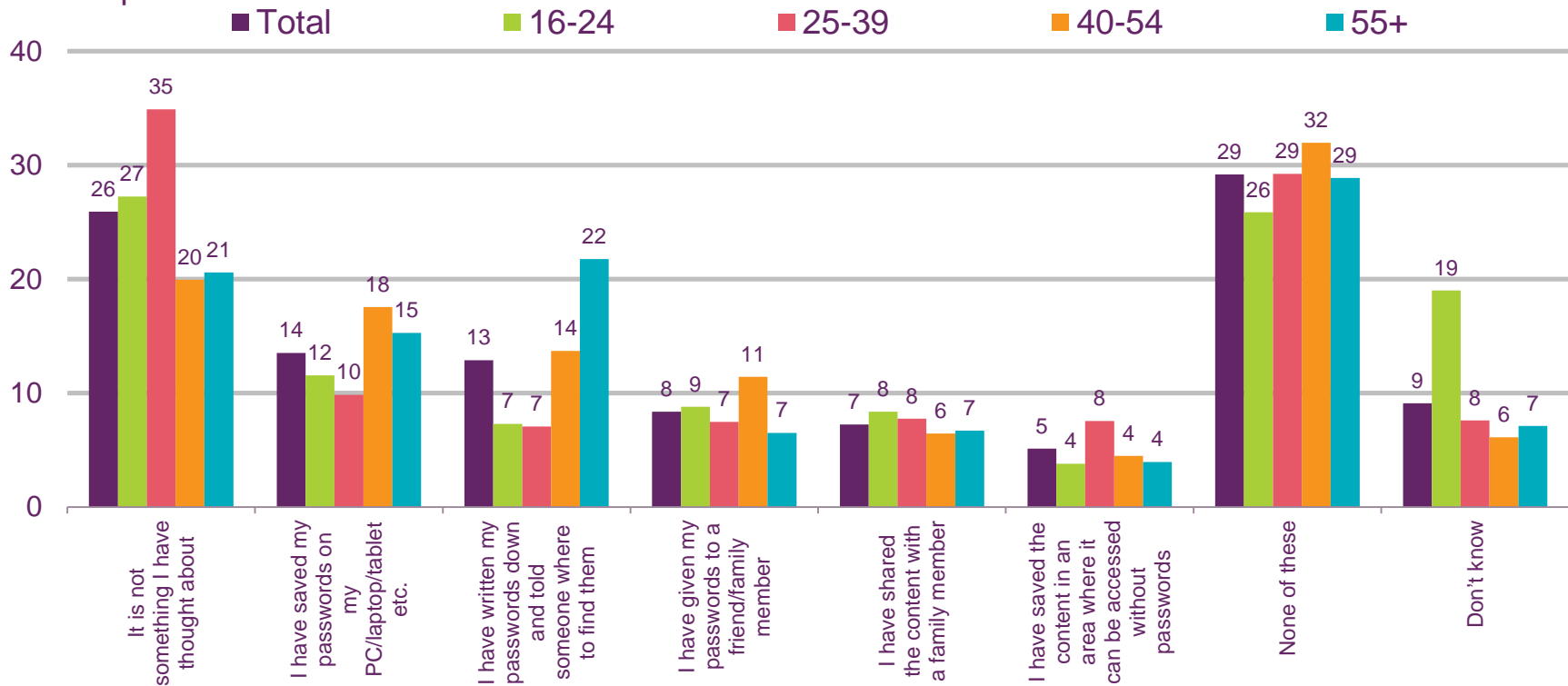
Base: Online UK adults 16+ (2147), 16 – 24 (279), 25 – 39 (384), 40 – 54 (554), 55+ (930)

q40. Which of the following statements applies to you?

Figure 5.11

Actions taken to safeguard continued access to content

% of respondents



Source: YouGov, Attitudes Towards Technology 2015, April 2015

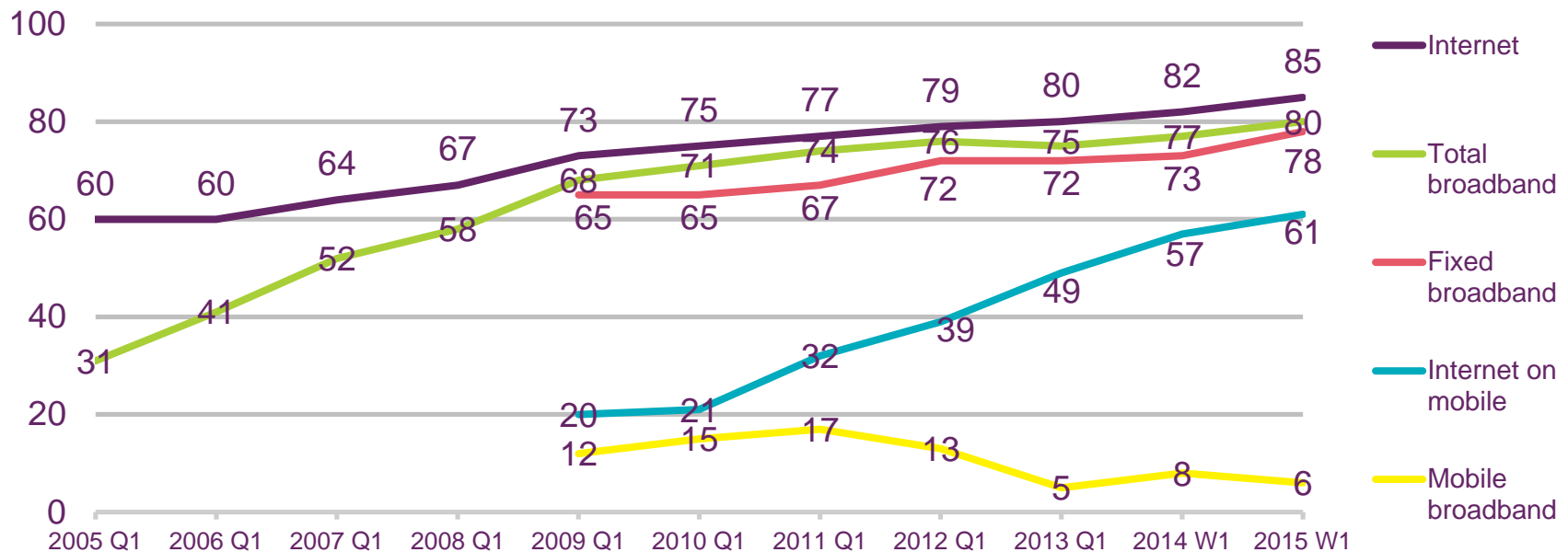
Base: Online UK adults 16+ who use online data storage services (773), 16 – 24 (126), 25 – 39 (175), 40 – 54 (189), 55+ (283)

Q39. Have you taken any of the following steps to safeguard your data/content?

Figure 5.12

Household internet access: 2005 to 2015

Proportion of adults (%)



Source: Ofcom Technology Tracker. Data from Quarter 1 of each year 2005-2013, then Wave 1 2014-2015.

Base: All adults aged 16+ (n=3756).

Note 1: "Internet on mobile" is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

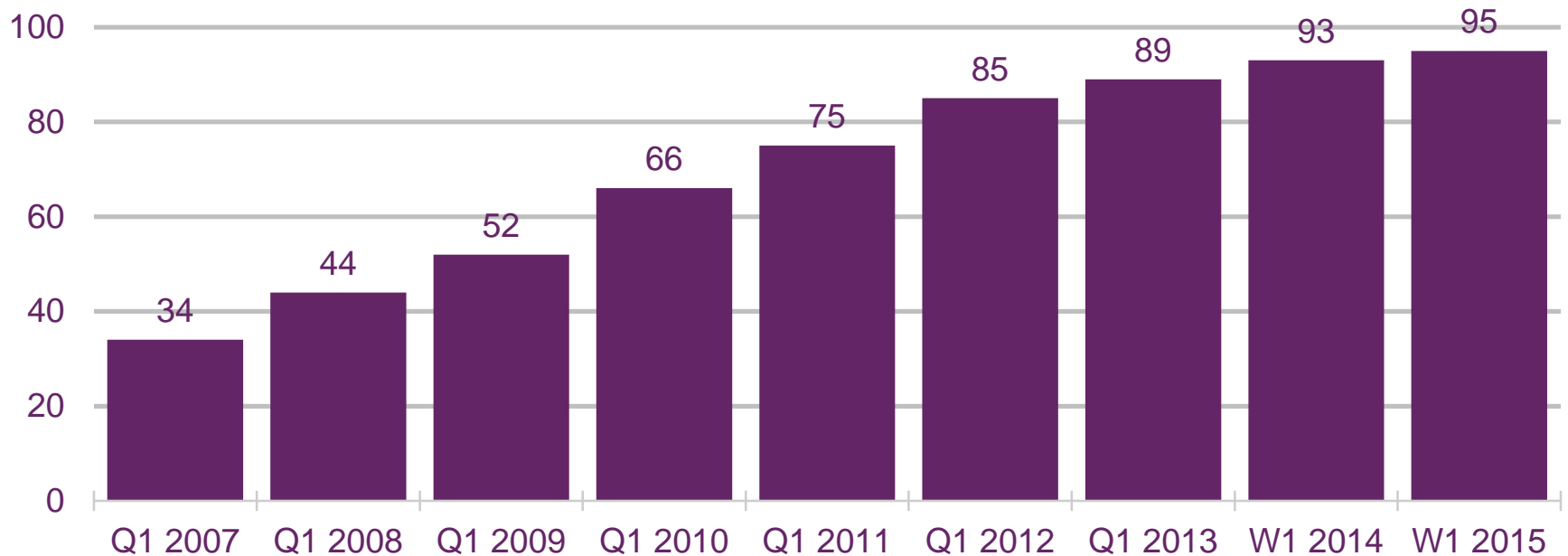
Note 2: From Q1 2009 the 'Internet' figure includes those who access the internet on mobile phones. QE2: Do you or does anyone in your household have access to the internet/World Wide Web at home (via any device, e.g. PC, mobile phone etc)? QE9: Which of these methods does your household use to connect to the Internet at home?

Note 3: Mobile broadband is connecting a device using a USB stick or dongle, or built-in connectivity in a laptop or netbook or tablet computer with a SIM card

Figure 5.13

Wireless router take-up in broadband homes: 2007 to 2015

Use within broadband households (%)



Source: Ofcom Technology Tracker. Data from Q1 2007-2013, wave 1 2014-2015

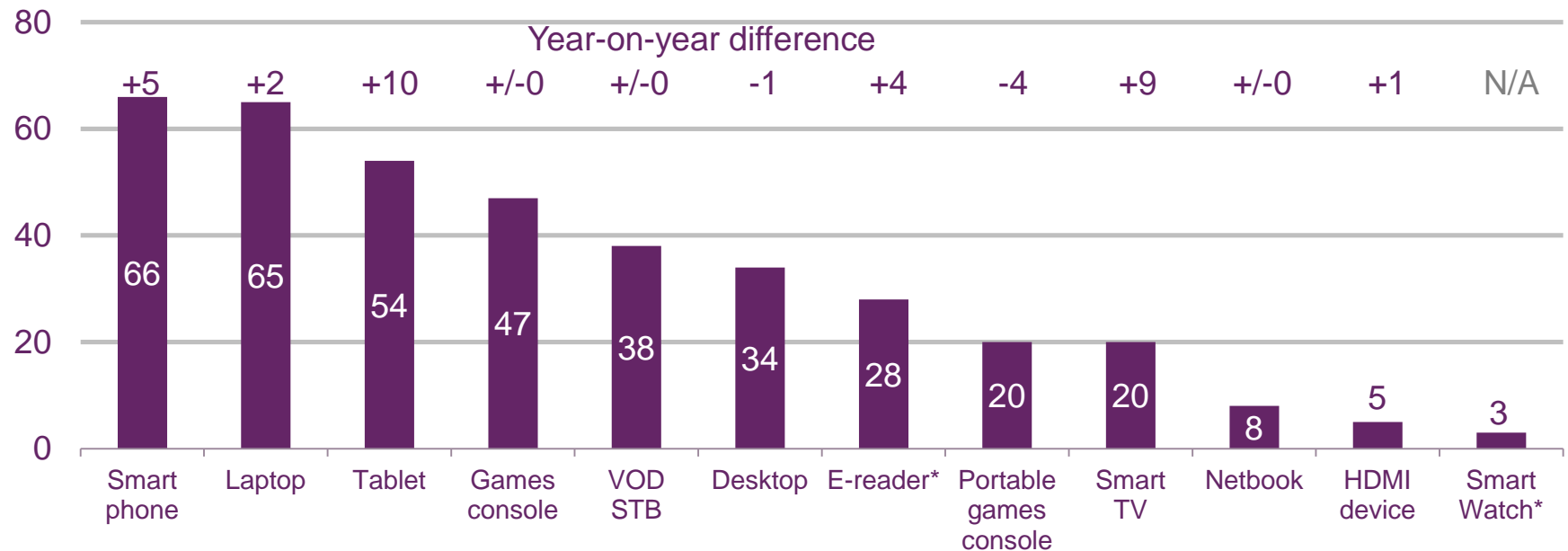
Base: Wireless router take-up - adults aged 16+ with a broadband connection at home. From 2009 this is based on fixed broadband connections only.

QE28(QE35): Do you or anyone in your household use a fixed wireless internet connection at home (Wi-Fi)?

Figure 5.14

Ownership of internet-enabled devices

Household take-up (%)



Source: Ofcom Technology Tracker, W1 2015

Base: Adults aged 16+ n = 3756

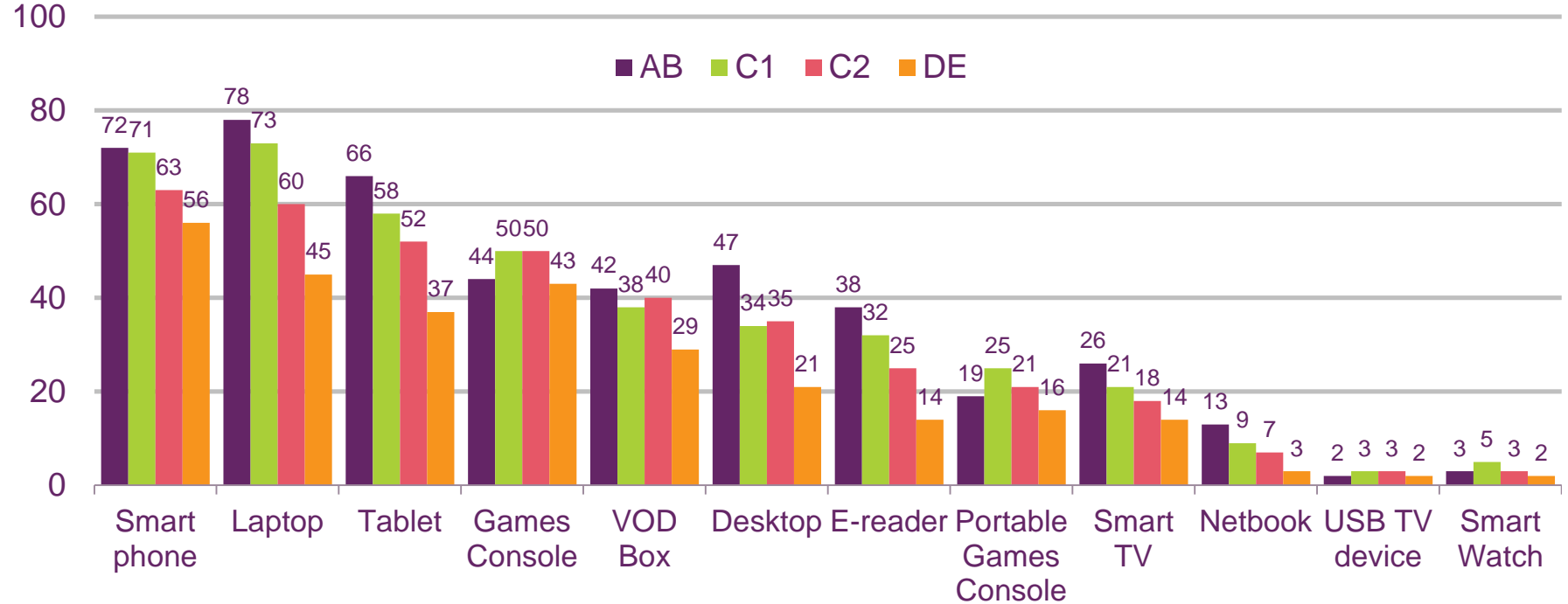
Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, PlayStation Portable/Vita), VOD STB (all Virgin TV customers, Sky+ HD, BT TV, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV, and HDMI device (Roku, Chromecast, Now TV).

*E-reader and Smart Watch take-up stated here is per household while elsewhere in the report we state figures by individual take-up. Smart Watches were not included in the survey prior to 2015.

Figure 5.15

Take-up of internet enabled devices by socio-economic group

Proportion of adults (%)



Source: Ofcom Technology Tracker, W1 2015

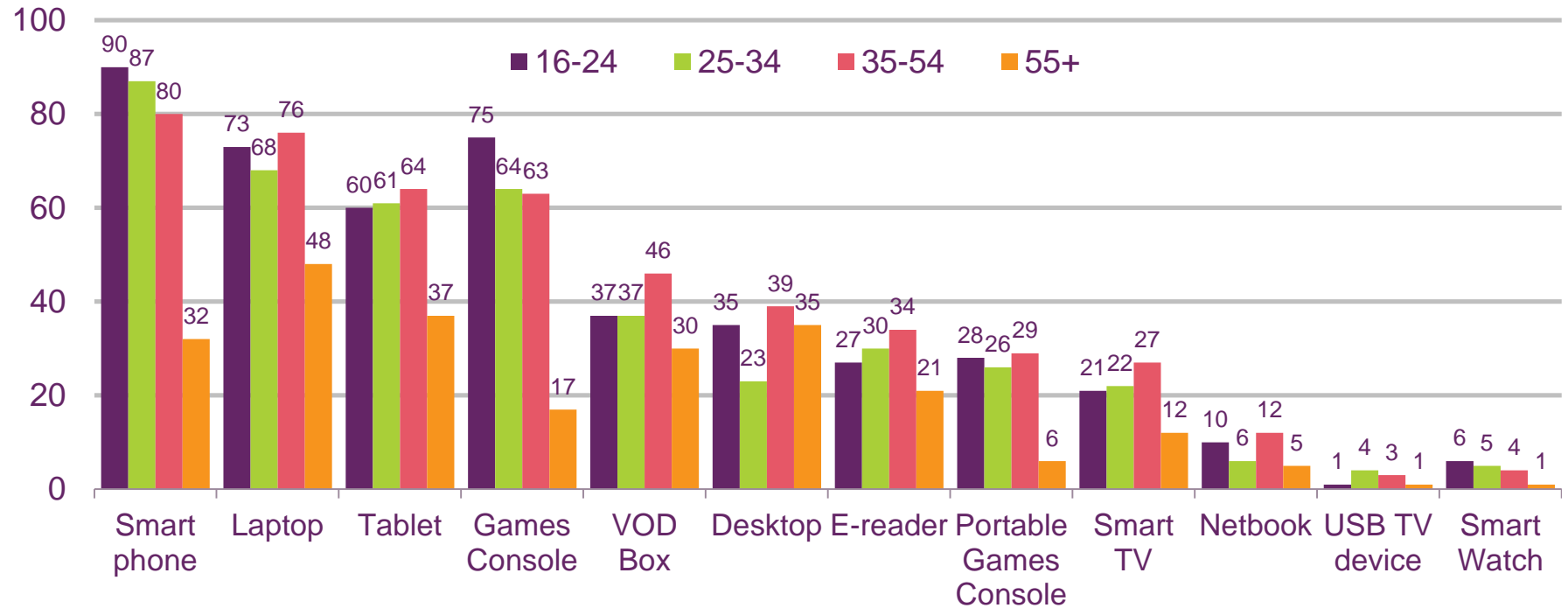
Base: Adults aged 16+, AB n = 828, C1 n = 1120, C2 n = 781, DE n = 1026

Note: Ranked by overall household ownership

Figure 5.16

Take-up of internet-enabled devices, by age

Proportion of adults (%)



Source: Ofcom Technology Tracker, W1 2015

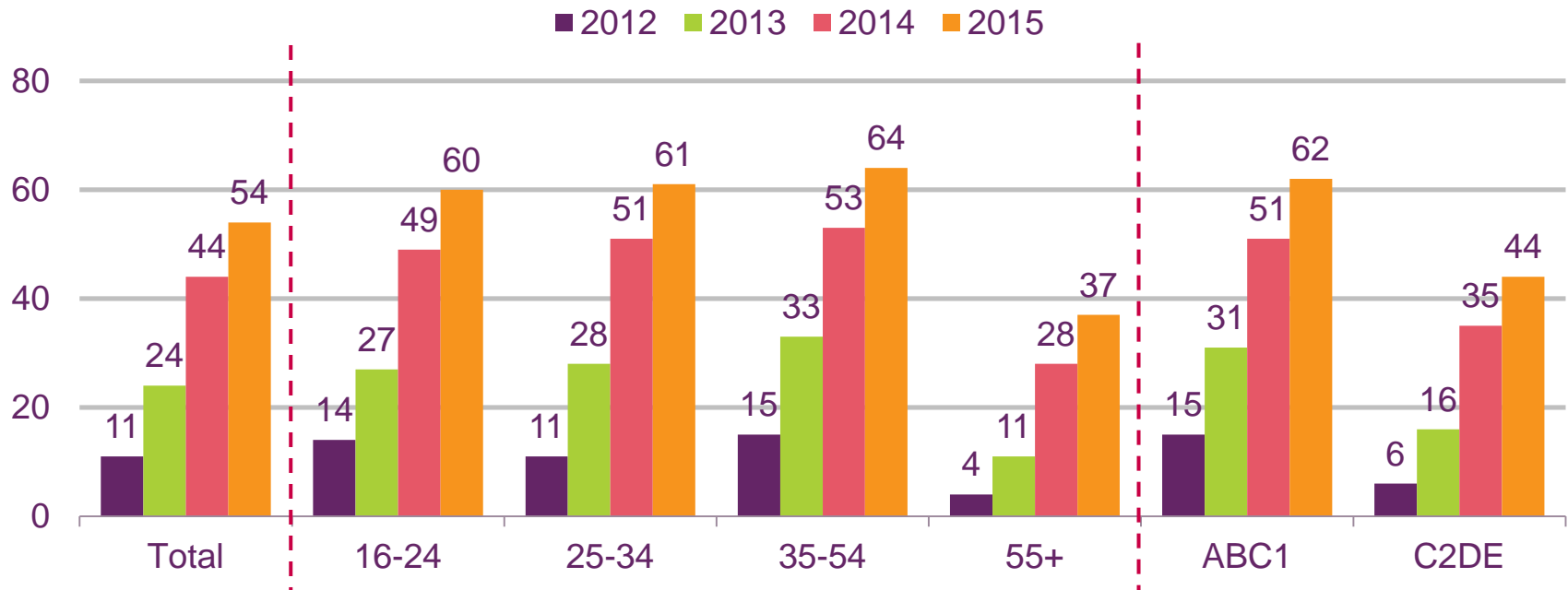
Base: 16-24 n = 514, 25-34 n = 606, 35-54 n = 1189, 55+ n = 1447

Note: Ranked by overall household ownership

Figure 5.17

Tablet computer ownership, by age and socio-economic group: 2012-2015

Household take-up (%)



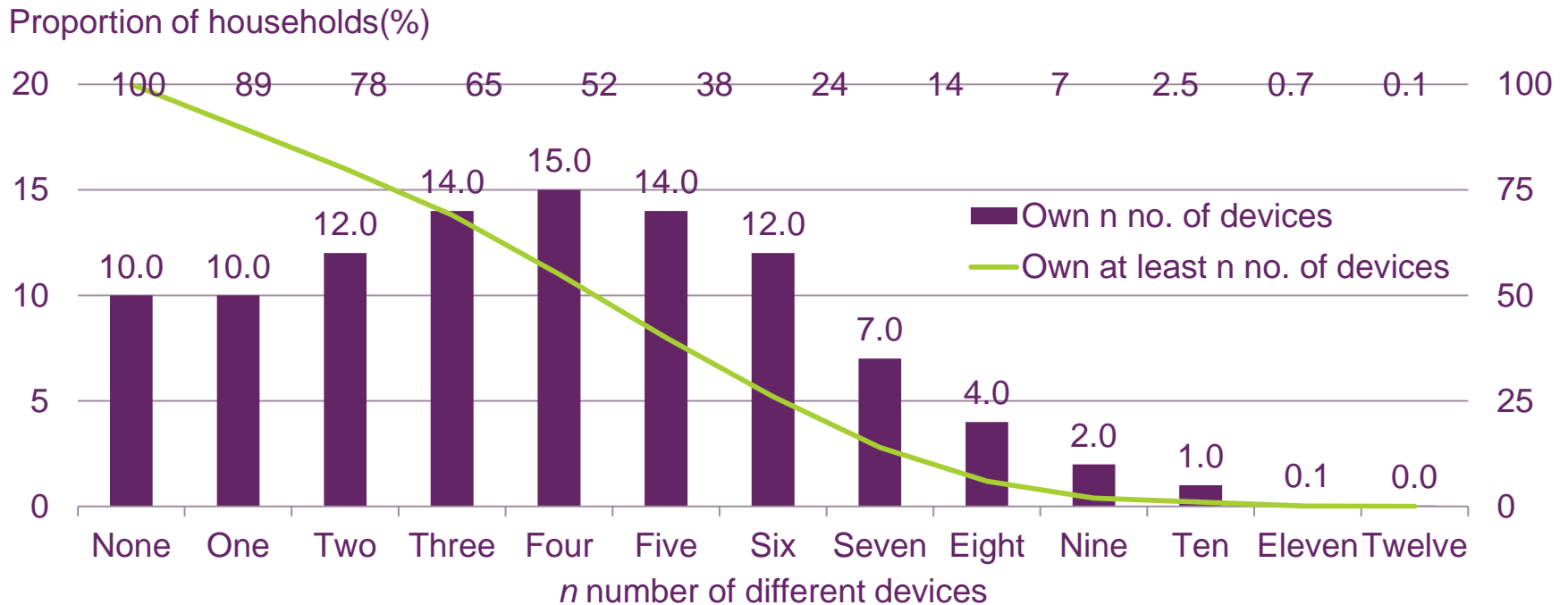
Source: Ofcom Technology Tracker. Data from Quarter 1 of each year 2012-2013, then Wave 1 2014-2015

Base: All adults aged 16+, 2012=3772, 2013=3750, 2014=3740, 2015=3756

QE1: Does your household have a PC, laptop, netbook or tablet computer?

Figure 5.18

Number of different internet-enabled devices per household, Q1 2015



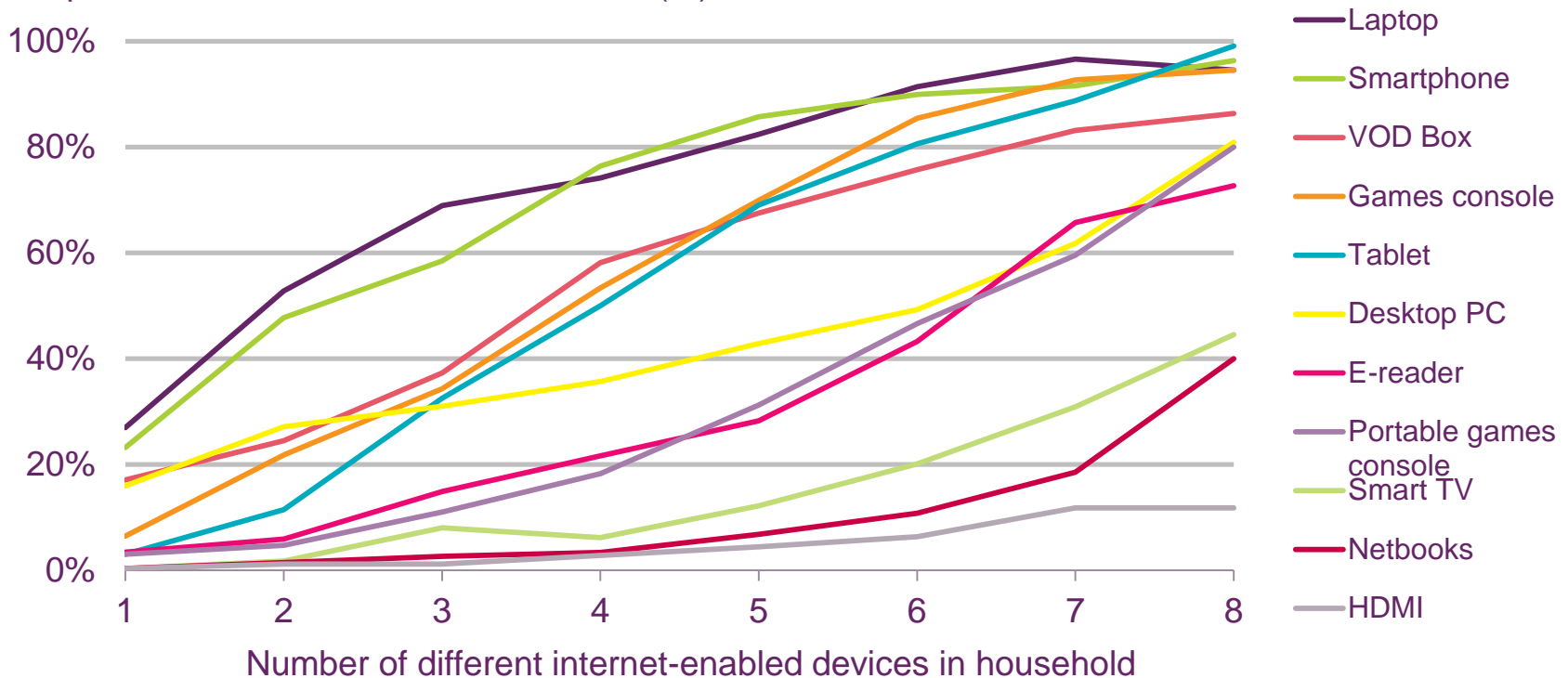
Source: Ofcom research, Q1 2015, Base: Adults aged 16+ n = 2673

Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, smartwatch, portable games console (Nintendo DS range, PlayStation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV and HDMI device.

Figure 5.19

Device ownership, by number of different internet-enabled devices in the household

Proportion of households that own device (%)



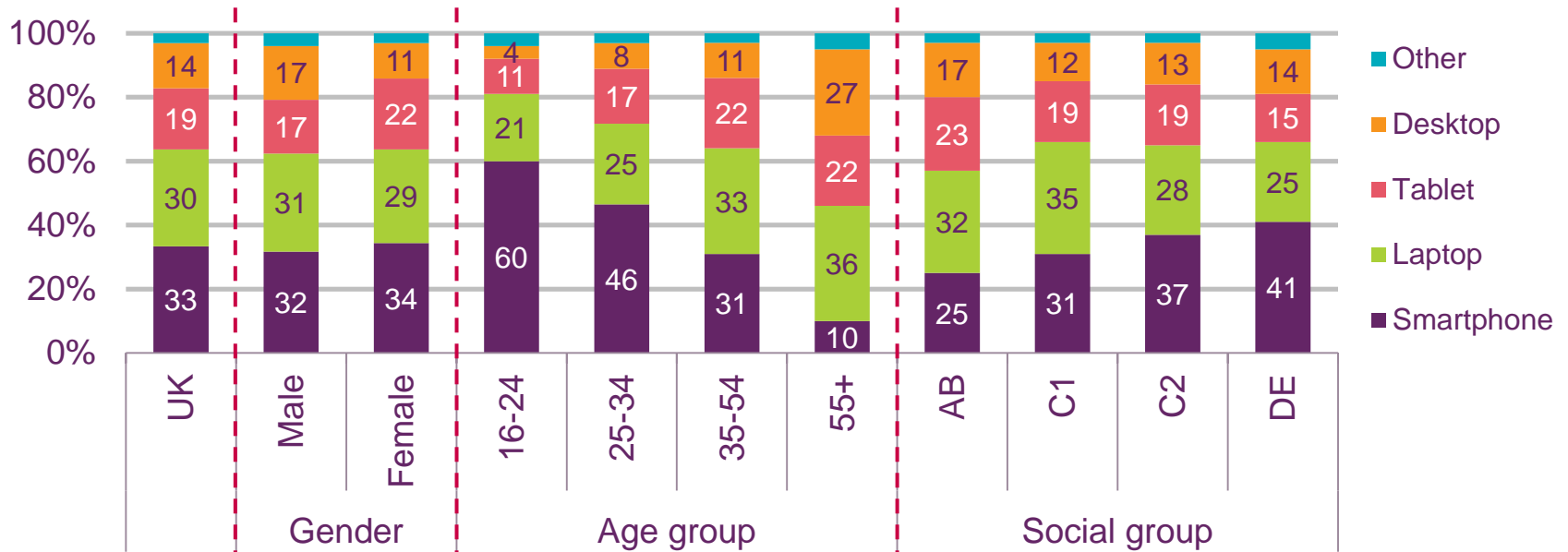
Source: Ofcom research, Q1 2015, Base: Adults aged 16+ with at least one IP-enabled device n = 2411

Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, smartwatch, portable games console (Nintendo DS range, PlayStation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, TalkTalk TV and YouView), e-reader, tablet, netbook, smart TV and HDMI device.

Figure 5.20

Most important device for internet access

Internet users (%)



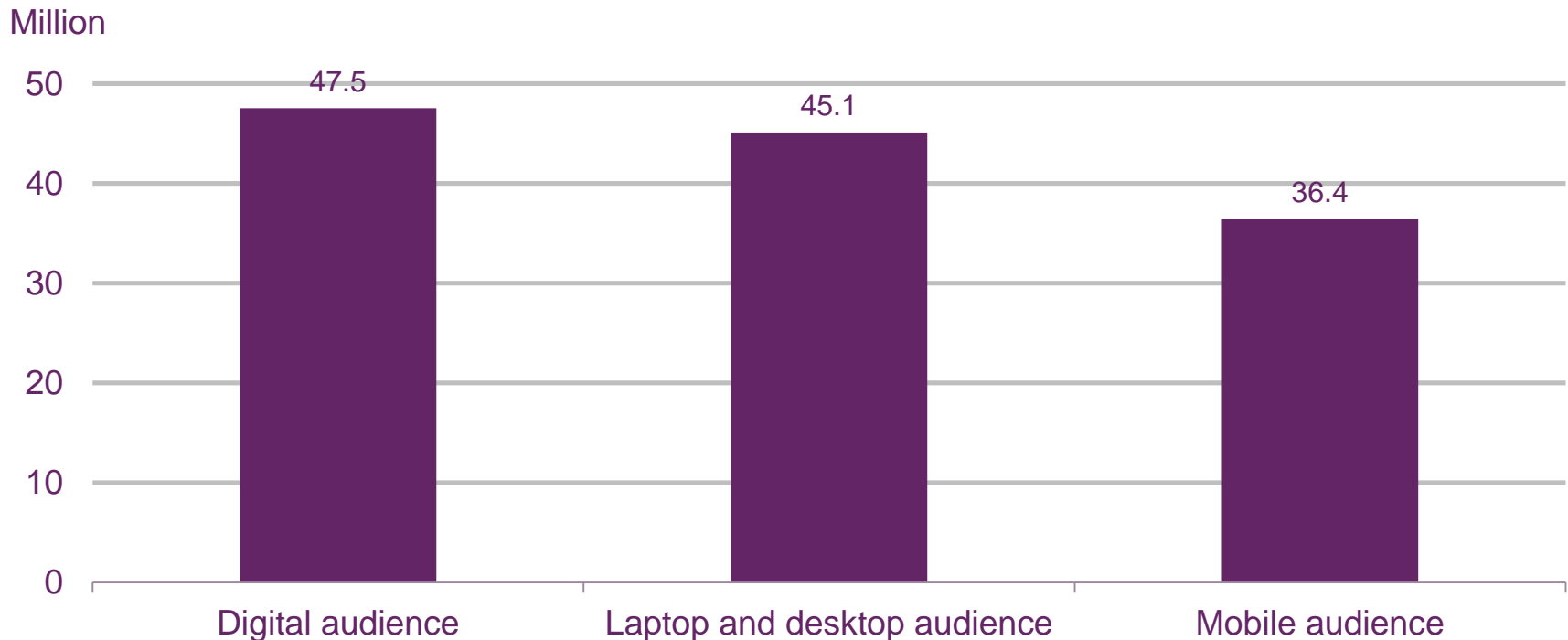
Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK).

QE11(QE40): Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "Netbook", "Games console", "Other device", "None" and "don't know".

Figure 5.21

Active internet audience: March 2015



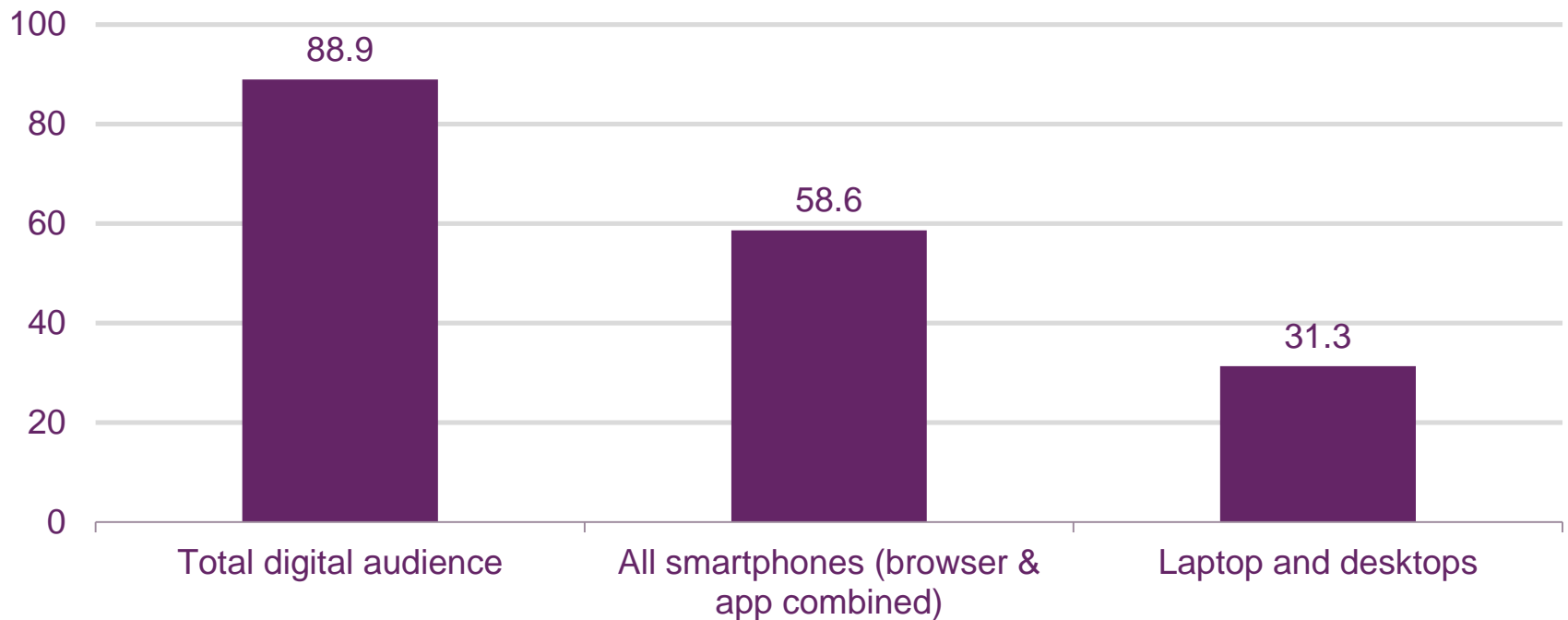
Source: comScore MMX, UK, home and work panel, March 2015; comScore MMX-MP, UK, March 2015; comScore MoMX UK, March 2015.

Note: 'Digital audience' is the unique audience across desktop/laptops and mobile. Mobile audience includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.22

Average time spent online: March 2015

Hours



Source total digital audience: comScore MMX-MP, UK, March 2015, (bases include ages 6+ for desktops/laptops, 18+ for mobile devices);

Source all smartphones: comScore MoMX, UK, 18+, March 2015.

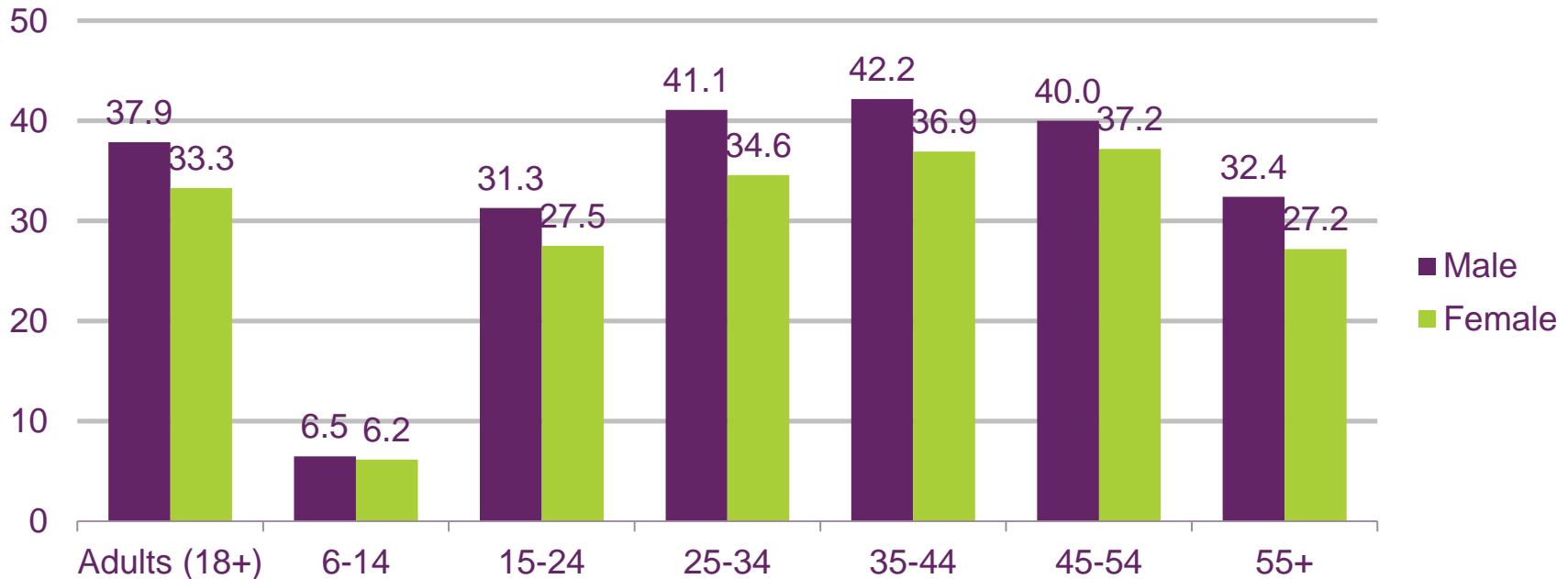
Source laptops and desktops: comScore MMX, home and work panel, UK, 6+, March 2015;

Note: All smartphones, includes iPhones and Android handsets, browser and application use.

Figure 5.23

Average time online on a laptop/desktop, by age and gender: March 2015

Hours

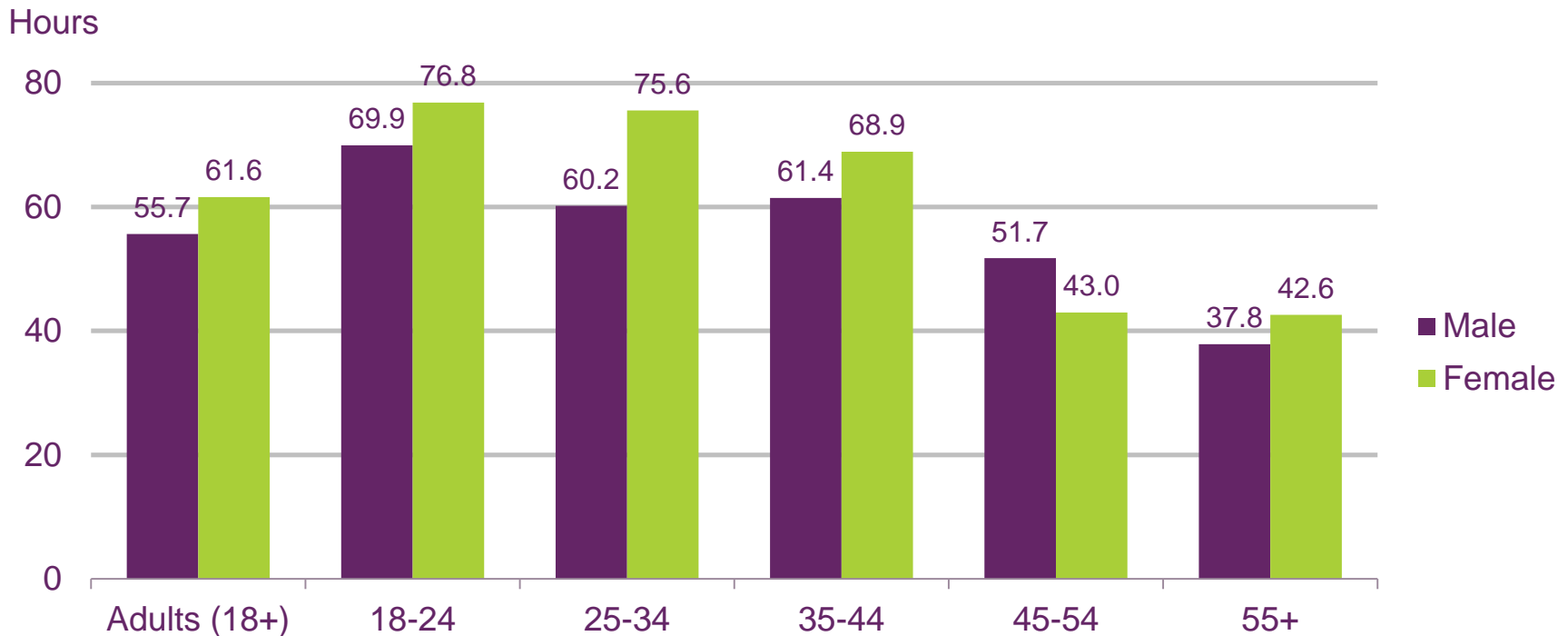


Source: comScore MMX, home and work panel, March 2015

Note: Time spent online is a measure of time spent browsing web pages on laptop and desktop computers only. It excludes time spent accessing other media such as audio or video content.

Figure 5.24

Average time online on a smartphone, by age and gender: March 2015



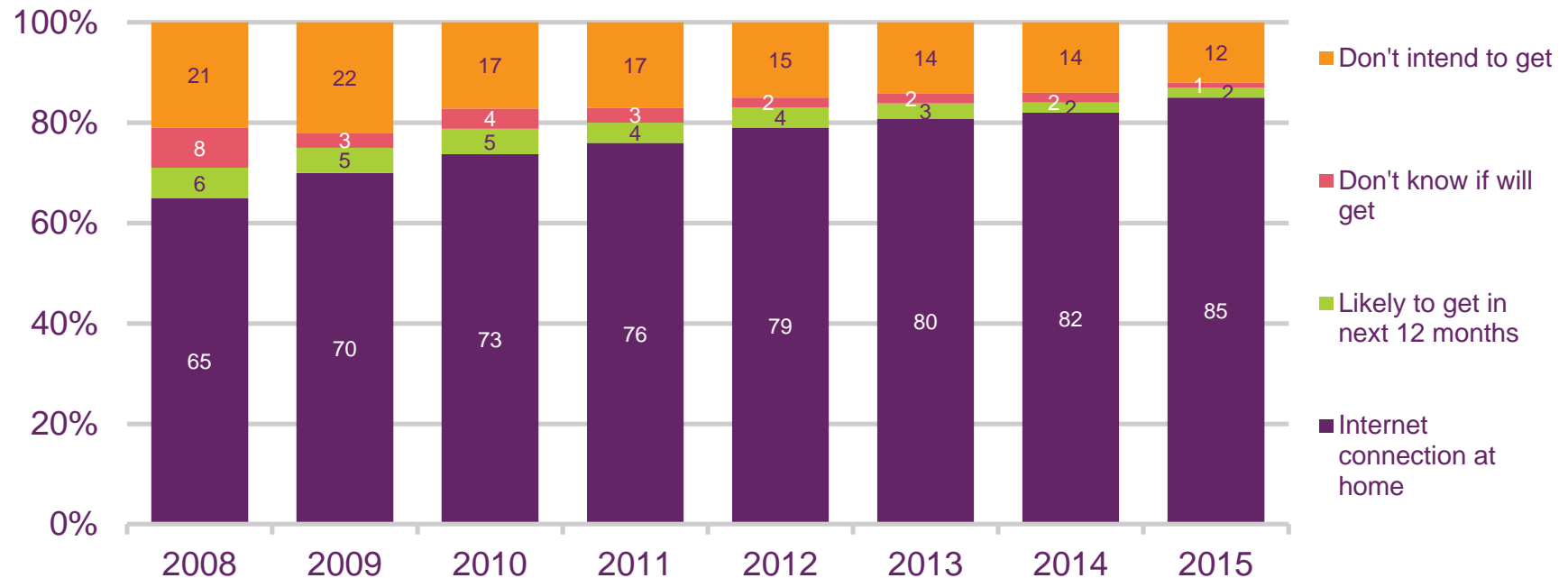
Source: comScore MoMX, March 2015. Browser and application access combined.

Note: Includes Android and iOS smartphones

Figure 5.25

Internet take up and intentions: 2008 - 2015

Adults (%)



Source: Ofcom Technology Tracker. Data from Q1 of each year 2008-2013, then wave 1 2014-2015

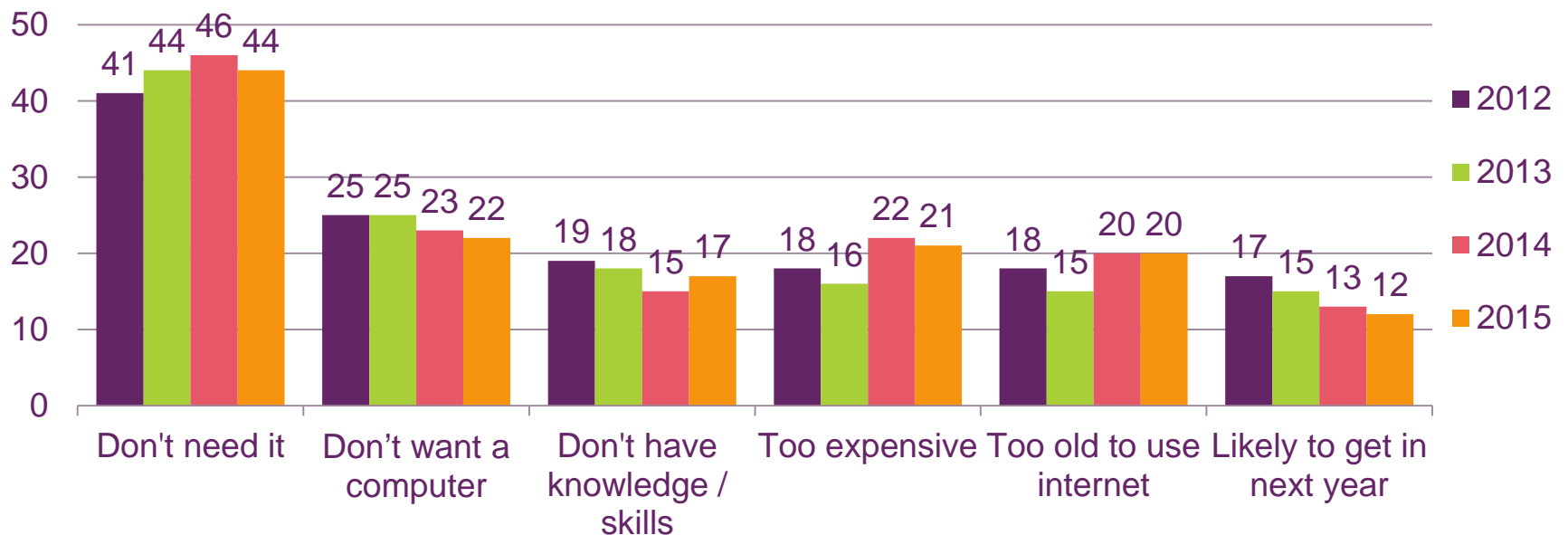
Base: All adults aged 16+ (5812 in 2008, 6090 in 2009, 9013 in 2010, 3474 in 2011, 3772 in 2012, 3750 in 2013, 3740 in 2014, 3756 in 2015).

QE2/ QE24 – Do you or does anyone in your household have access to the internet / World Wide Web at home (via any device)?/ How likely are you to get internet access at home in the next 12 months?

Figure 5.26

Main reasons for not having a home broadband connection

Proportion of those without broadband (%)



Source: Ofcom Technology Tracker. Data from Q1 2012-2013, wave 1 2014-2015

Base: All adults without the internet aged 16+ (n=681)

QE31(QE25A): Why are you unlikely to get internet access at home in the next 12 months?

Figure 5.27

Perceived advantages of being online among internet non-users



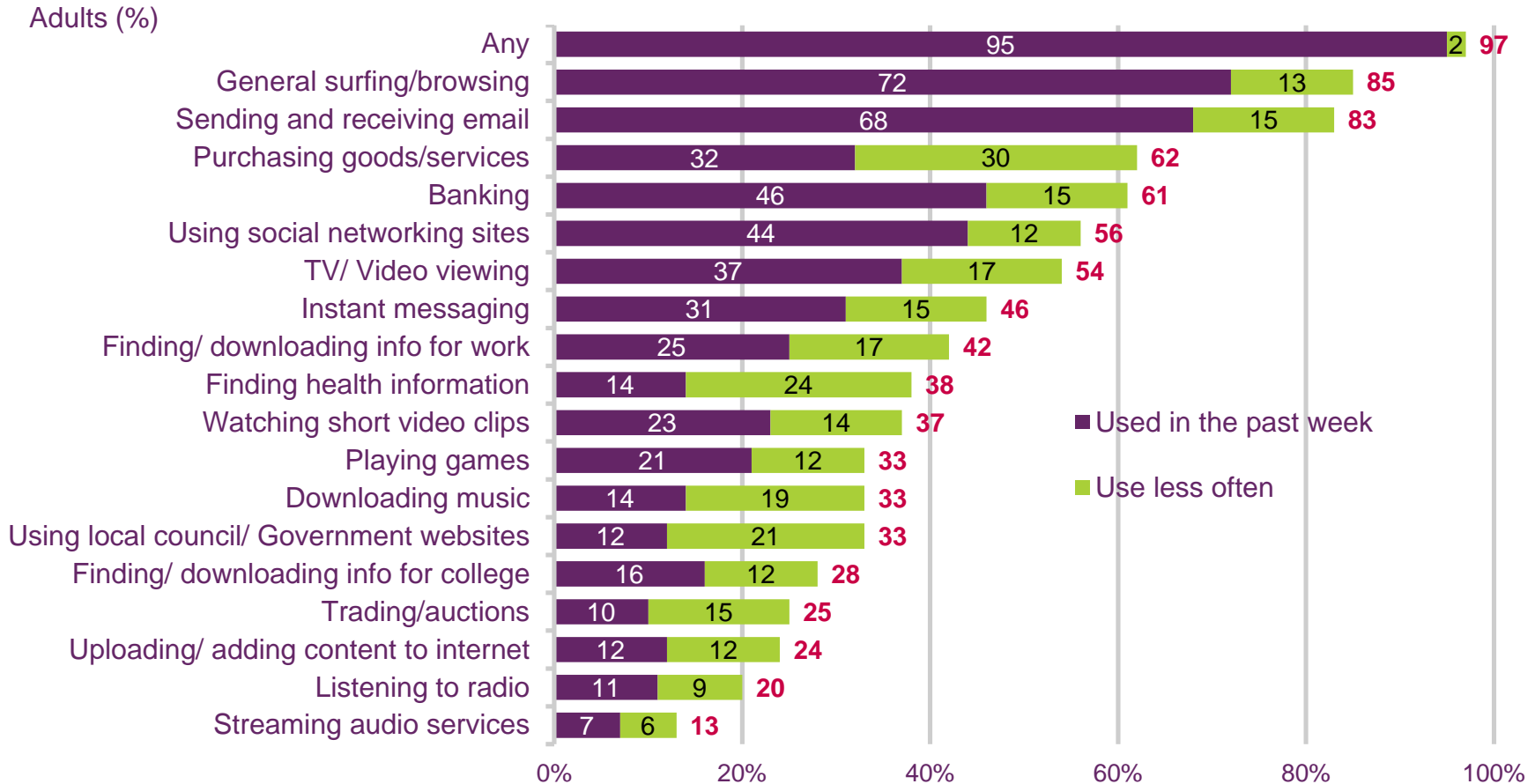
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in October to November 2014

Base: Adult internet users aged 16+ who do not go online at home or elsewhere (281)

IN12 Which, if any, of the following do you think would be the main advantages to you of being online? Can you think of any other advantages for you personally in being online? (prompted responses, multi-coded)

Figure 5.28

Claimed use of the internet for selected activities



Source: Ofcom Technology Tracker, wave 1 2015

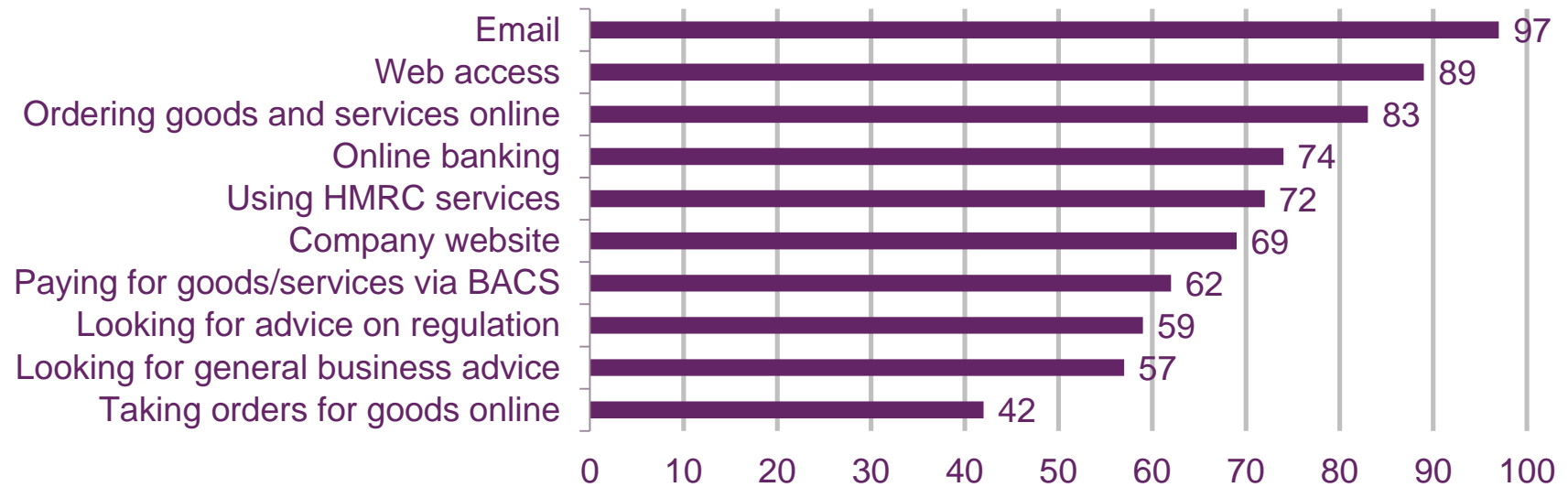
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3095 UK)

QE5. Which, if any, of these do you use the internet for?

Use of the internet by SMEs

Top ten internet applications for SMEs

SMEs with fixed internet (%)



Source: Ofcom research. Fieldwork April – June 2014

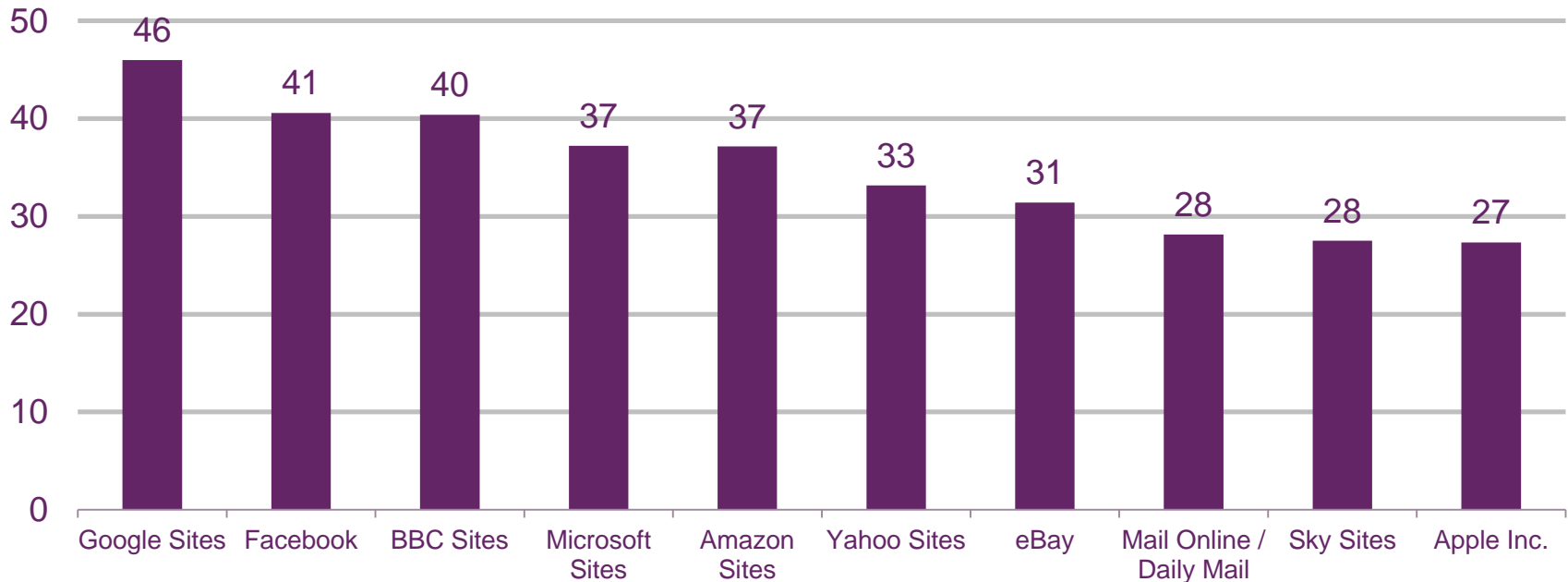
QA10a: Which if any of the following internet applications does your organisation use for business purposes?

Base: All with fixed internet (Total n=1267, 1-4 n=471, 1-9 n=737, 10-49 n=301, 50-249 n=229).

Figure 5.29

Top ten most popular internet properties among the digital audience: March 2015

Unique audience (millions)



Source: comScore MMX Multi-Platform, UK, March 2015

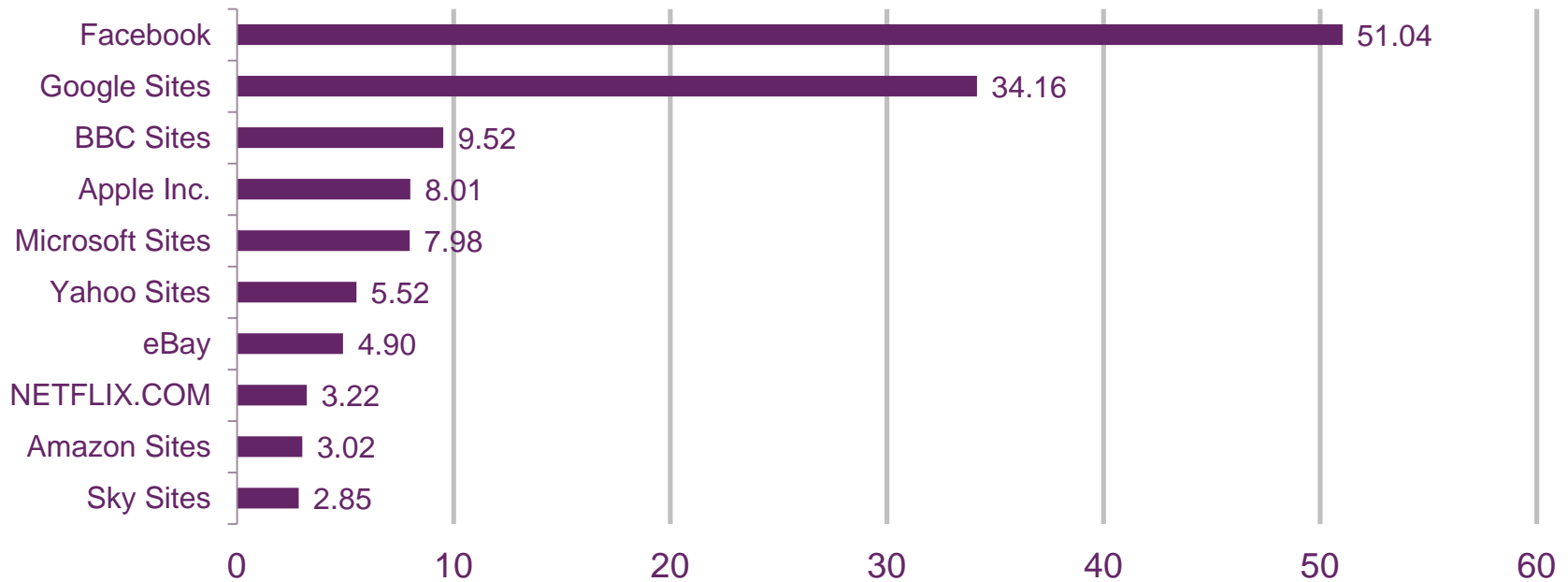
All sites listed are at the property level [P]. Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network and Wi-Fi mobile browsing and app use.

Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX MP. Only those entities that have been tagged as part of the census network report tablet usage data.

Figure 5.30

Top ten comScore properties among the digital audience, by time spent

Total Minutes (billions)



Source: comScore MMX Multi-Platform, UK, March 2015

Note: All sites listed are at the property level. Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network and Wi-Fi mobile browsing and application data. It excludes time spent accessing audio content.

Figure 5.31

Most popular app downloads March 2015

App ranking by number of downloads in UK - iOS and Google Play Combined

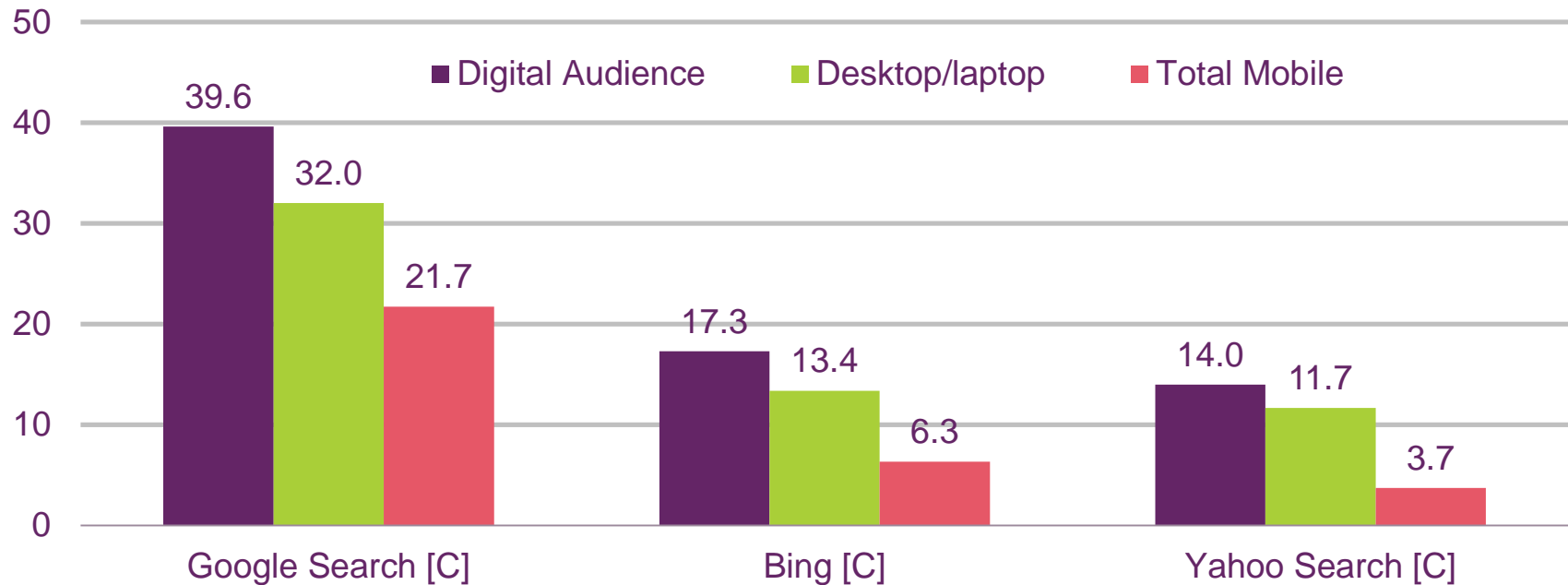
	App	Company
1	WhatsApp Messenger	Facebook
2	Facebook	Facebook
3	Facebook Messenger	Facebook
4	YouTube	Google
5	Crossy Road	HIPSTER WHALE
6	Instagram	Facebook
7	Skype	Microsoft
8	Snapchat	Snapchat
9	Spotify	Spotify
10	Candy Crush Soda Saga	King

Source: App Annie Index <https://www.appannie.com/indexes/all-stores/rank/overall/?month=2015-03-01&country=GB>

Figure 5.32

Audience of search engines: March 2015

Unique audience (millions)

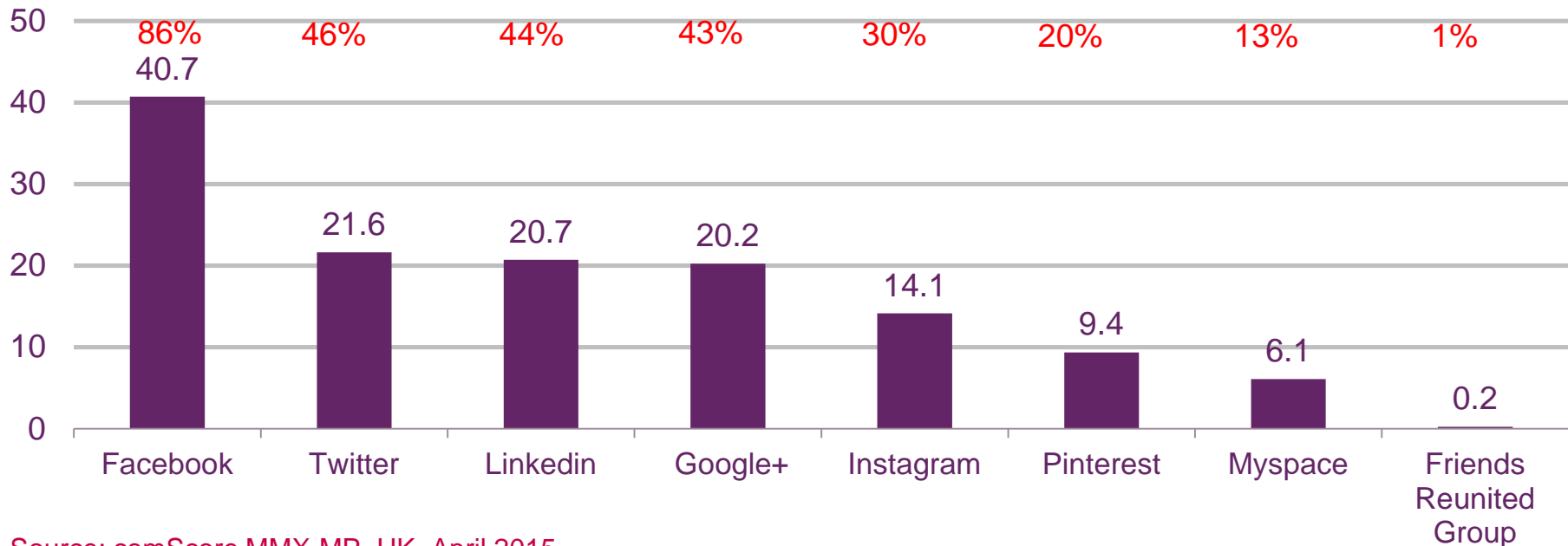


Source: Source: comScore MMX Multi-Platform, comScore MMX, comScore MoMX, UK, March 2015 MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. 'Total mobile' includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.33

Digital audience of social networking services: April 2015

Unique audience (millions) and reach as % total digital audience



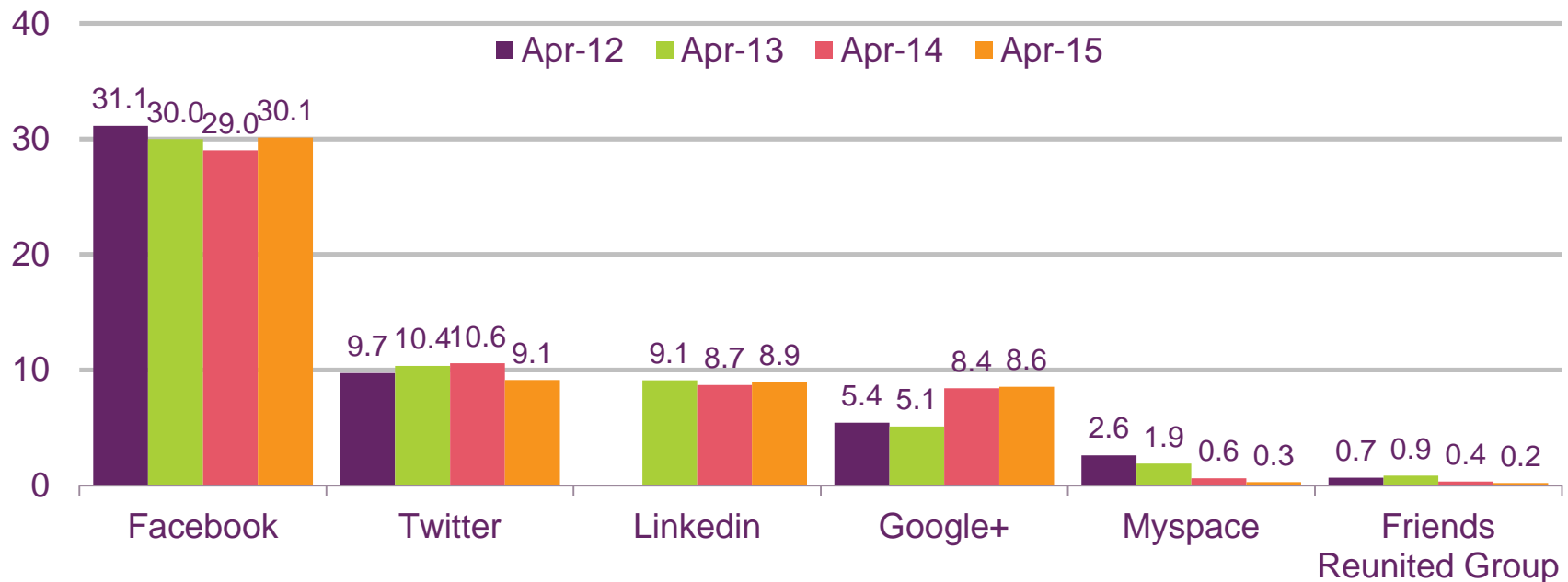
Source: comScore MMX-MP, UK, April 2015

Note: Entities cited from comScore MMX Multi-Platform: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus [C], INSTAGRAM.COM [M], PINTEREST.COM [P], MySpace [P], Friends Reunited Group [P]. MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.34

Unique audience of selected social networking websites on laptop/desktop computers: April 2012 to 2015

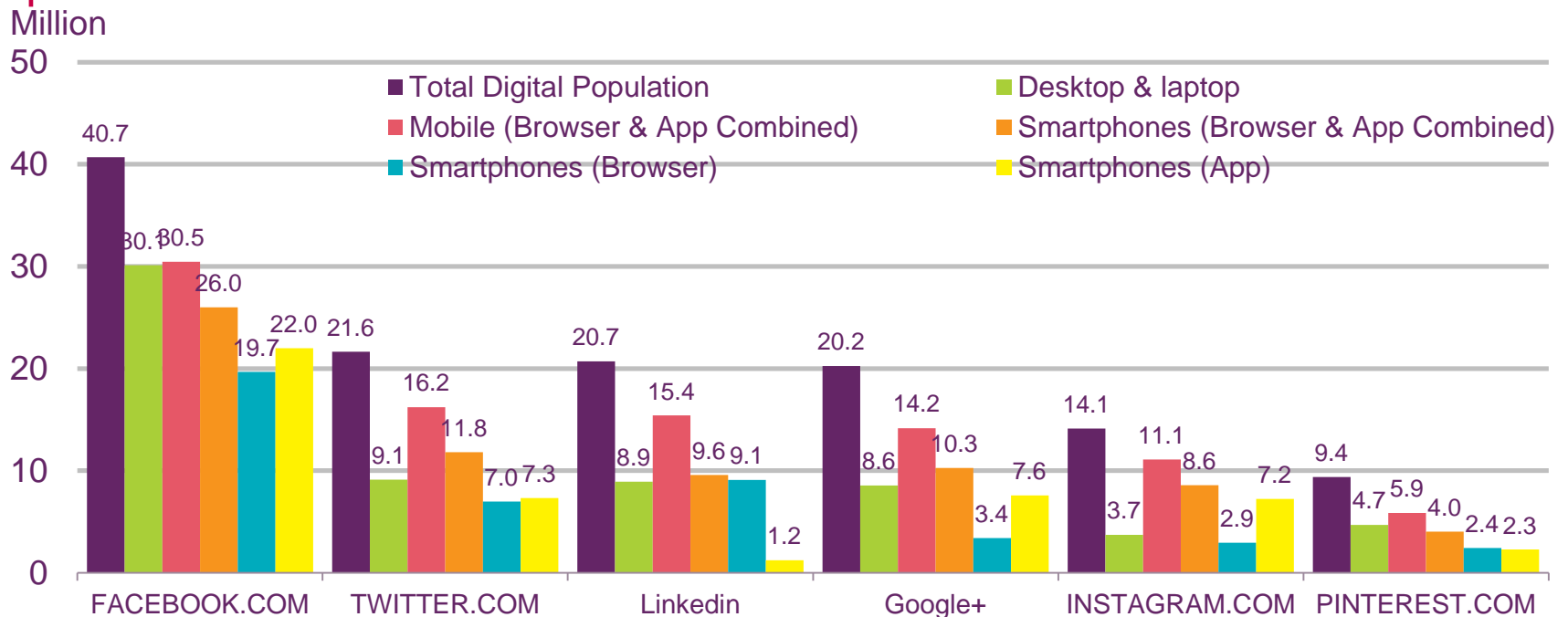
Unique audience (millions)



Source: comScore MMX, UK, home and work panel, April 2012 to April 2015. Note: Entities cited from comScore MMX: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus (2012-2014), Google + [C] (2015), MySpace [P], Friends Reunited Group [P]

Figure 5.35

Unique audience of selected social networking services, across devices: April 2015

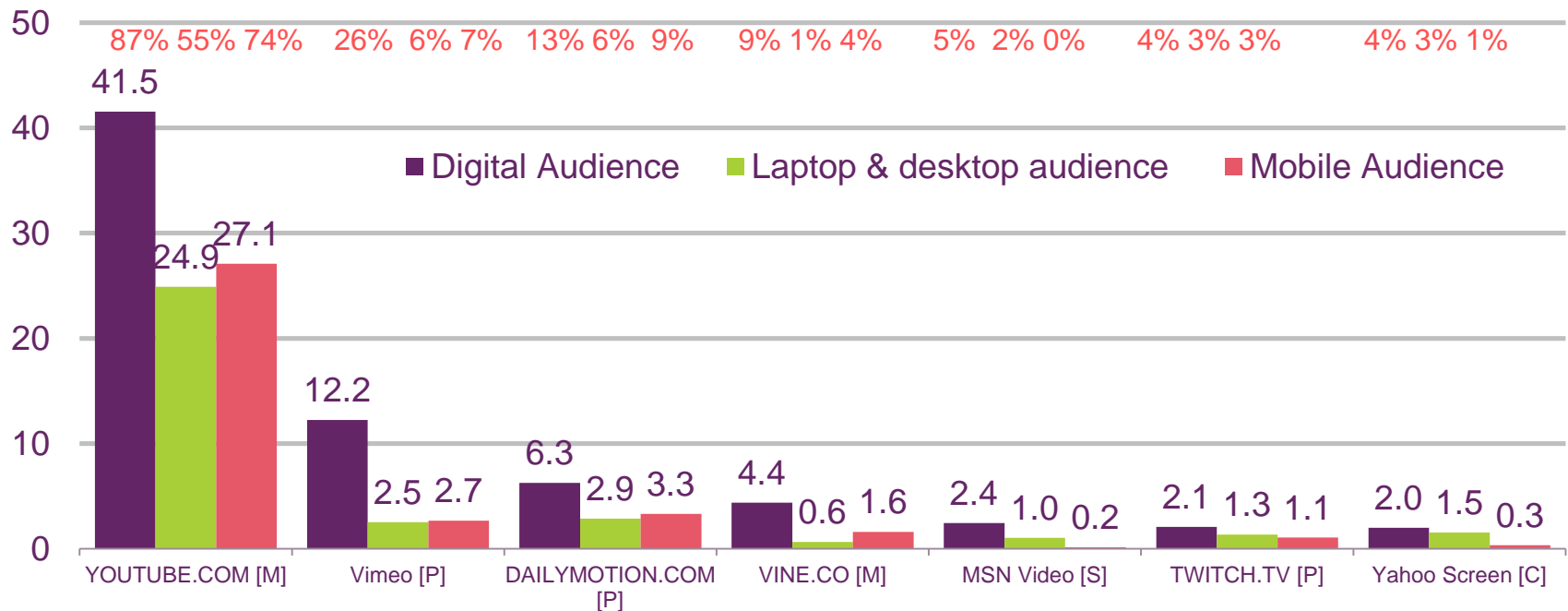


Source: comScore MMX home and work panel, MMX-MP, MoMX UK, April 2015. Note: Mobile devices include iOS and Android smartphones, iPads. Android tablets included for tagged entities. Entities cited include FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google+ [C], INSTAGRAM.COM [M], PINTEREST.COM [P]. 'Mobile' includes Android smartphones and iOS smartphones and tablets and Android tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. 'Smartphones' includes iOS and Android smartphones.

Figure 5.36

Unique audience for selected online video sharing services: March 2015

Unique audience (millions) and active reach %

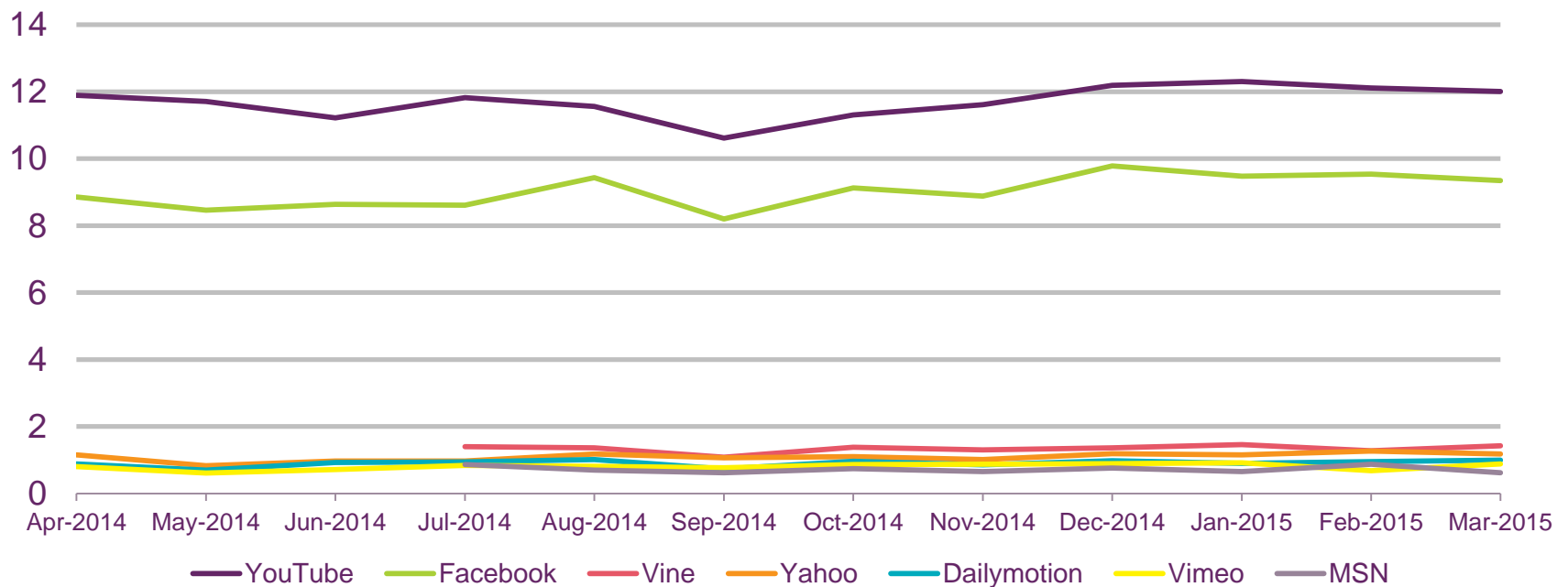


Source: comScore MMX, UK, home and work panel, comScore MMX-MP, UK and comScore MoMX, UK. All March 2015.
 Note: MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile audience includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.37

Claimed use of video on mobile phones

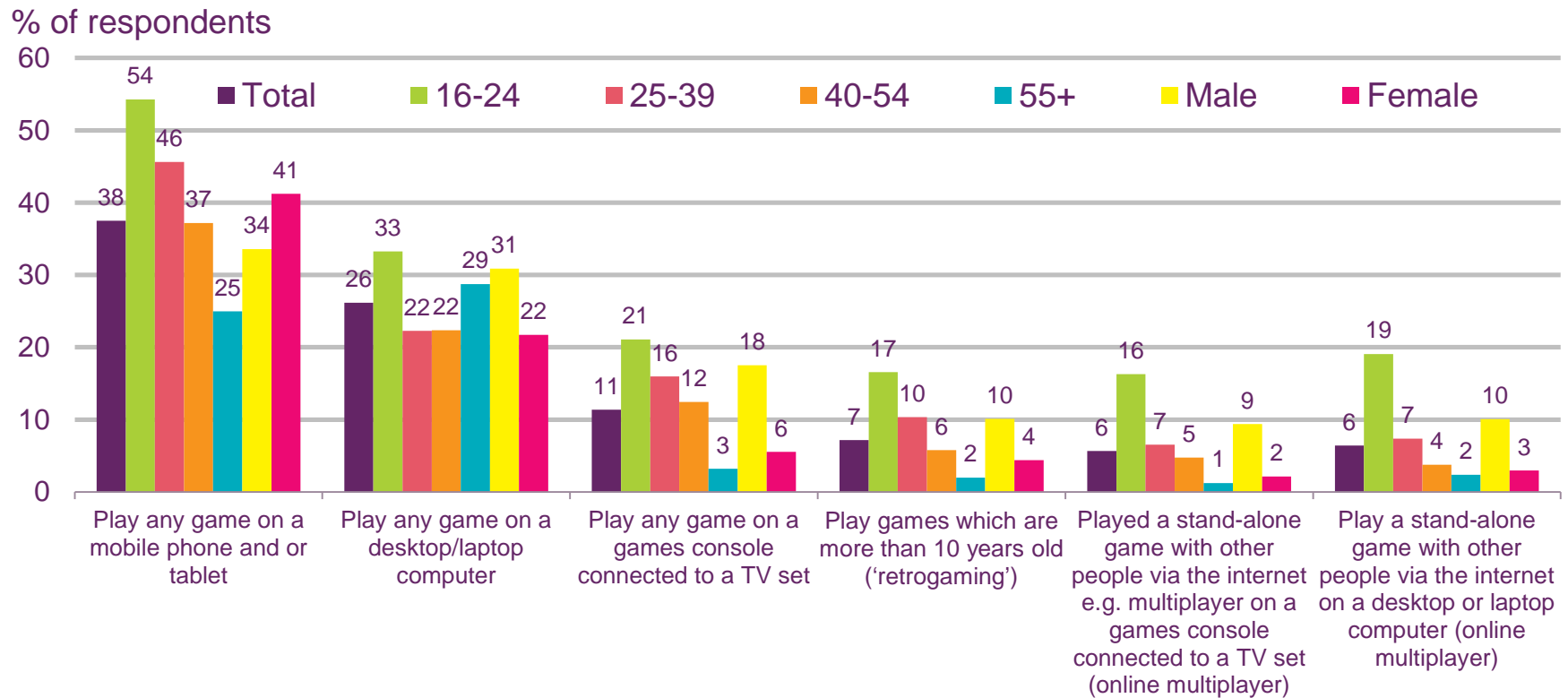
Audience (millions)



Source: comScore MobiLens. All users 13+

Figure 5.38

Gaming activities carried out in the past week



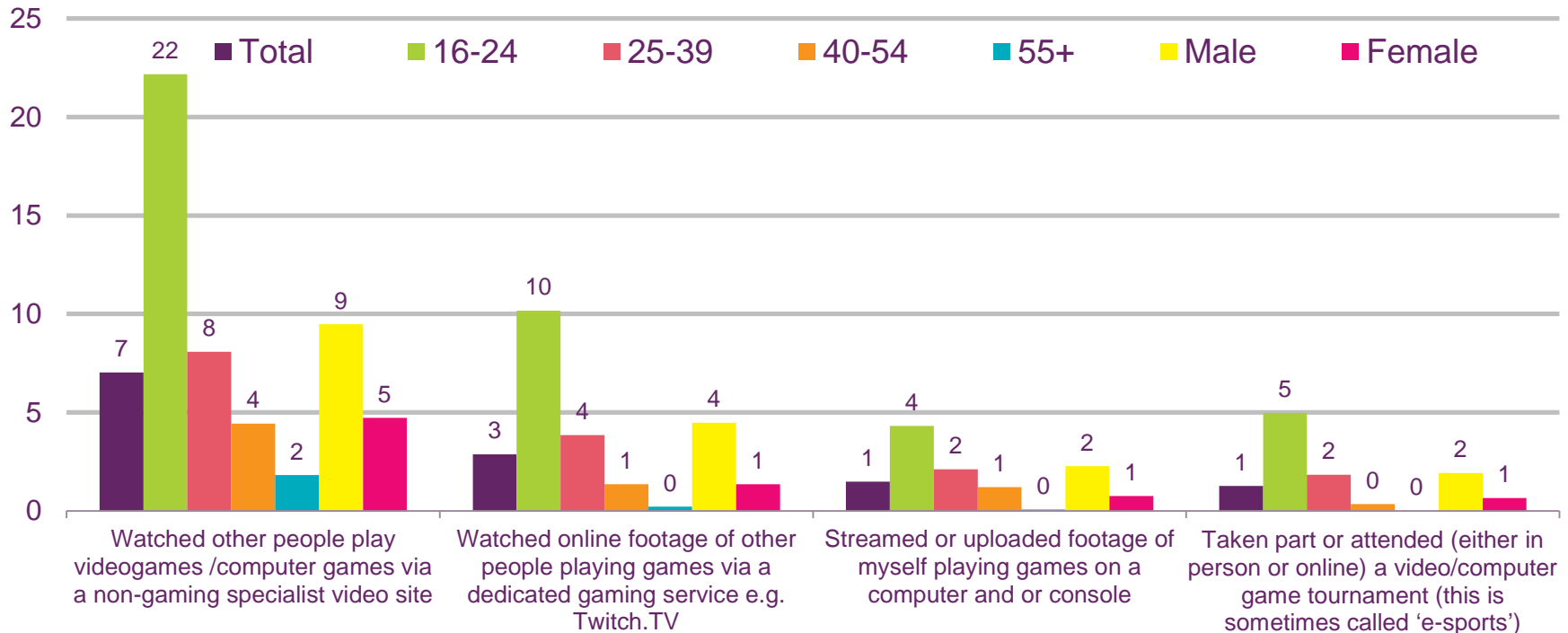
Source: YouGov, Attitudes Towards Technology 2015, April 2015

Base: Online UK adults 16+ (2147), 16 – 24 (279), 25 – 39 (384), 40 – 54 (554), 55+ (930), Male (1018), Female (1129) q4. Have you done any of the following in the past week?

Figure 5.39

Watching and streaming games footage in the past week

% of respondents



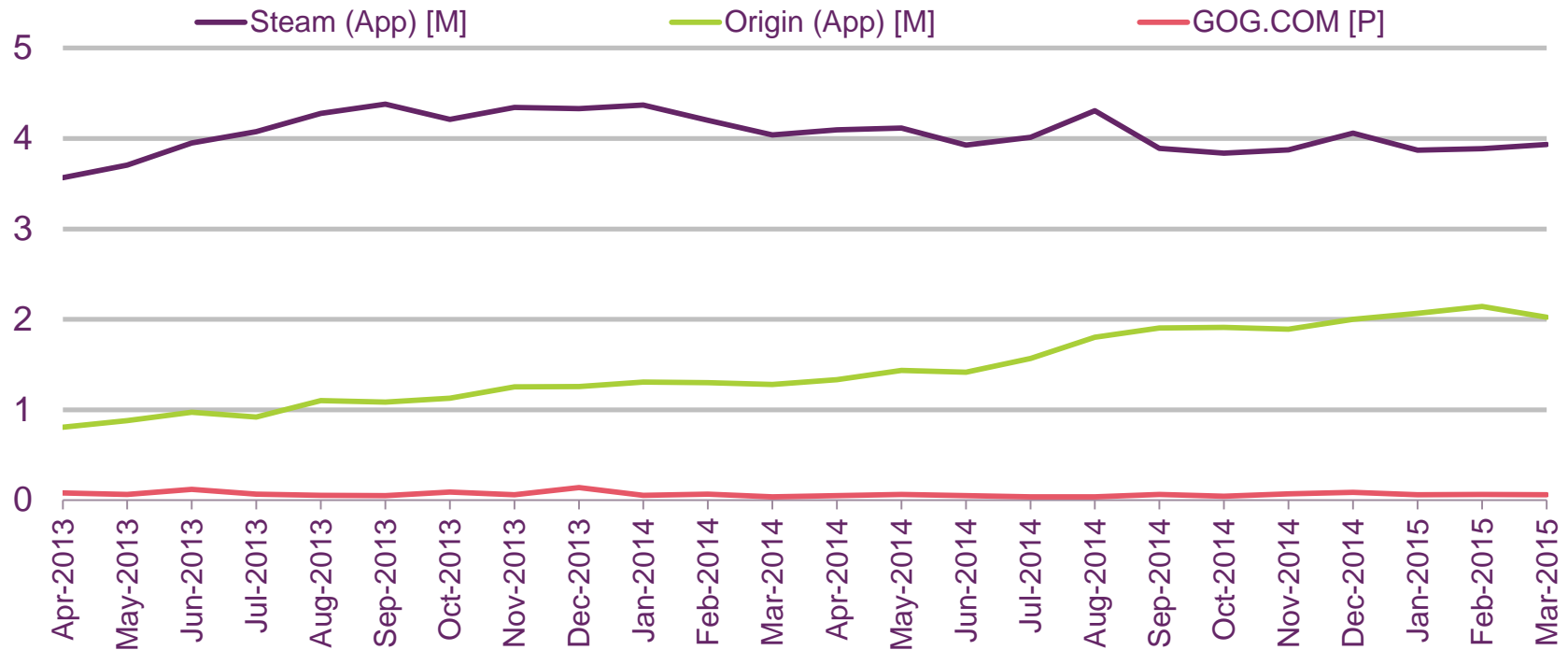
Source: YouGov, Attitudes Towards Technology 2015, April 2015

Base: Online UK adults 16+ (2147), 16 – 24 (279), 25 – 39 (384), 40 – 54 (554), 55+ (930), Male (1018), Female (1129) q4. Have you done any of the following in the past week?

Figure 5.40

Unique visitors to selected games platforms on desktop and laptop computers

Unique audience (millions)

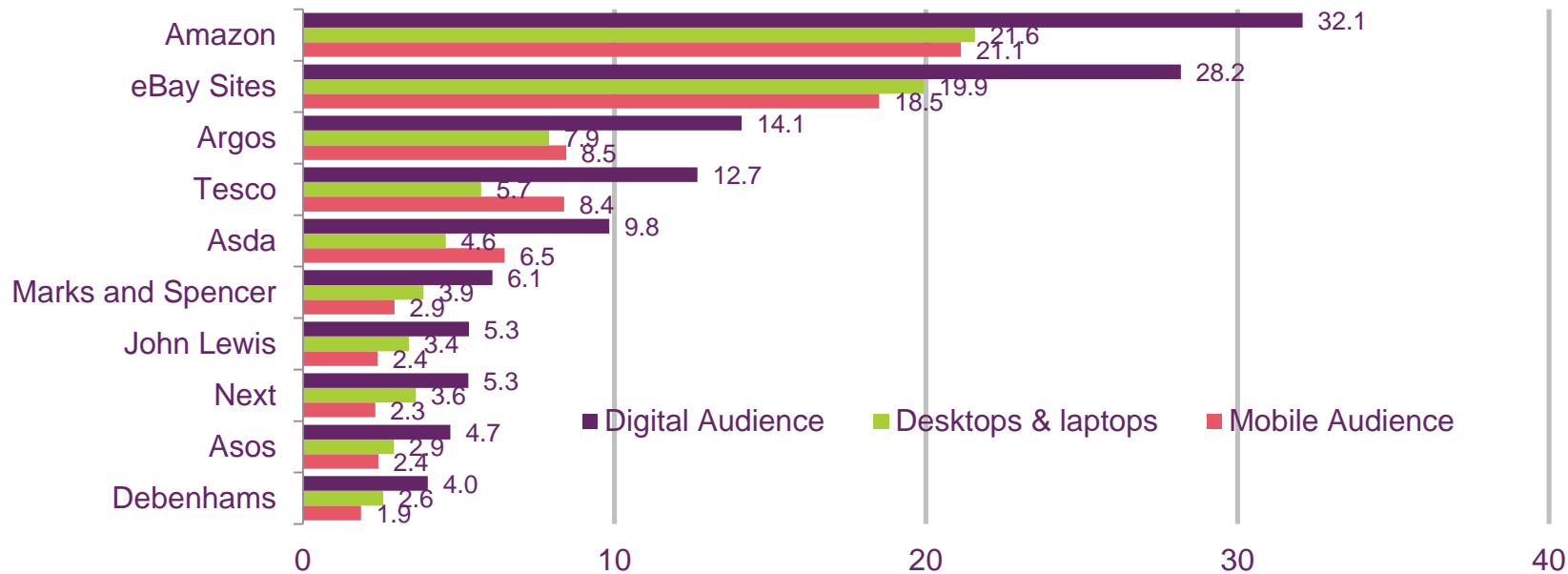


Source: comScore MMX, UK, home and work panel, April 2013 to March 2015

Figure 5.41

Digital audience of selected online retail services: March 2015

Unique audience (millions)

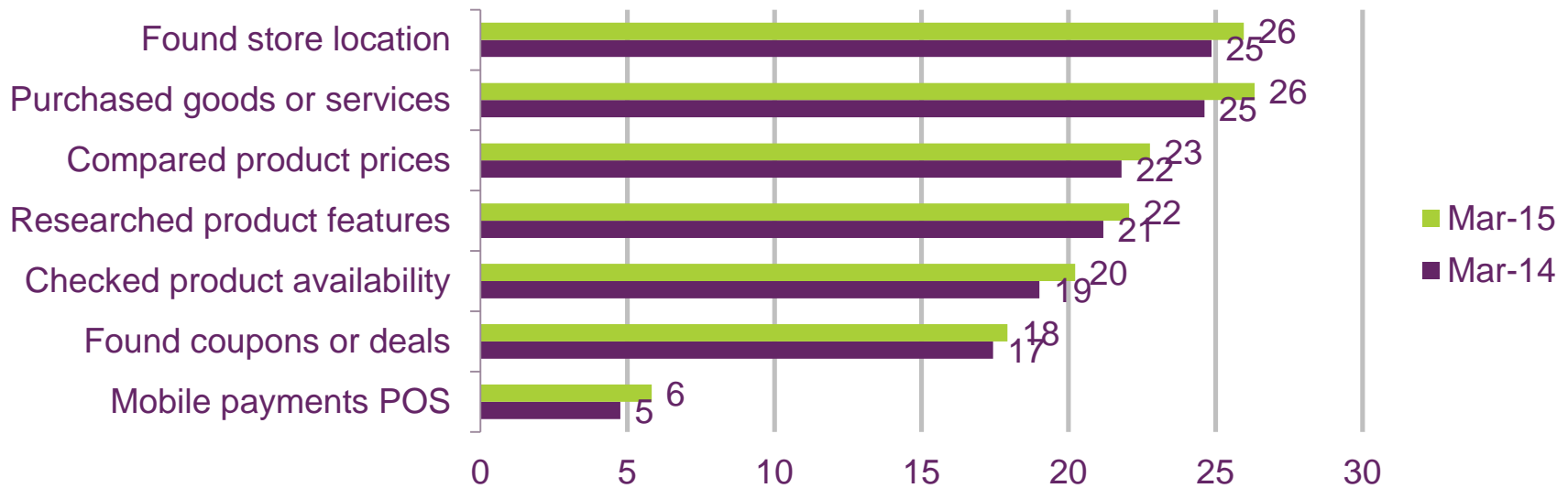


Source: comScore MMX Multi-Platform, comScore MMX, comScore MoMX UK, March 2015. Note: MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. comScore dictionary entities used were Amazon [M], eBay Sites [M], Argos [M], TESCO.COM* [M], Asda [M], MARKSANDSPENCER.CO [M], NEXT.CO.UK [M], ASOS.COM [M], DEBENHAMS.COM [M], John Lewis [M] * Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Figure 5.42

Mobile retail activities conducted by mobile internet users: March 2014 and March 2015

Mobile internet users (%)



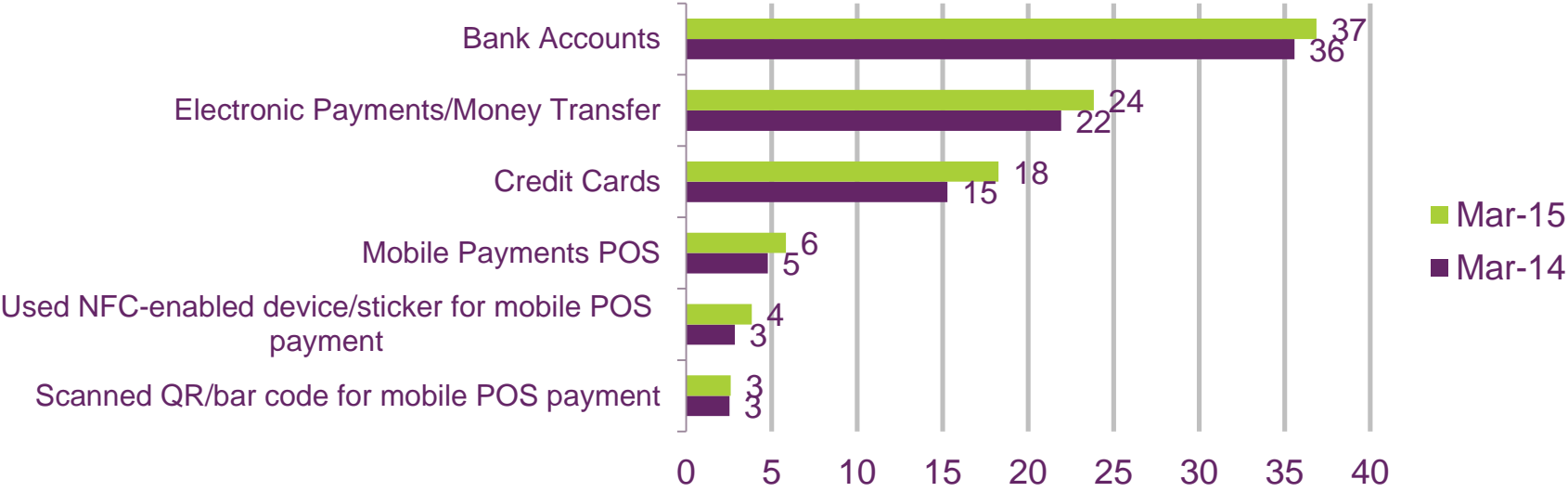
Source: comScore MobiLens, UK, 3 month averages ending March 2014 and March 2015

Base: Mobile internet users 13+

Figure 5.43

Selected mobile payments and financial services activities conducted by mobile internet users: March 2014 and March 2015

Mobile internet users (%)

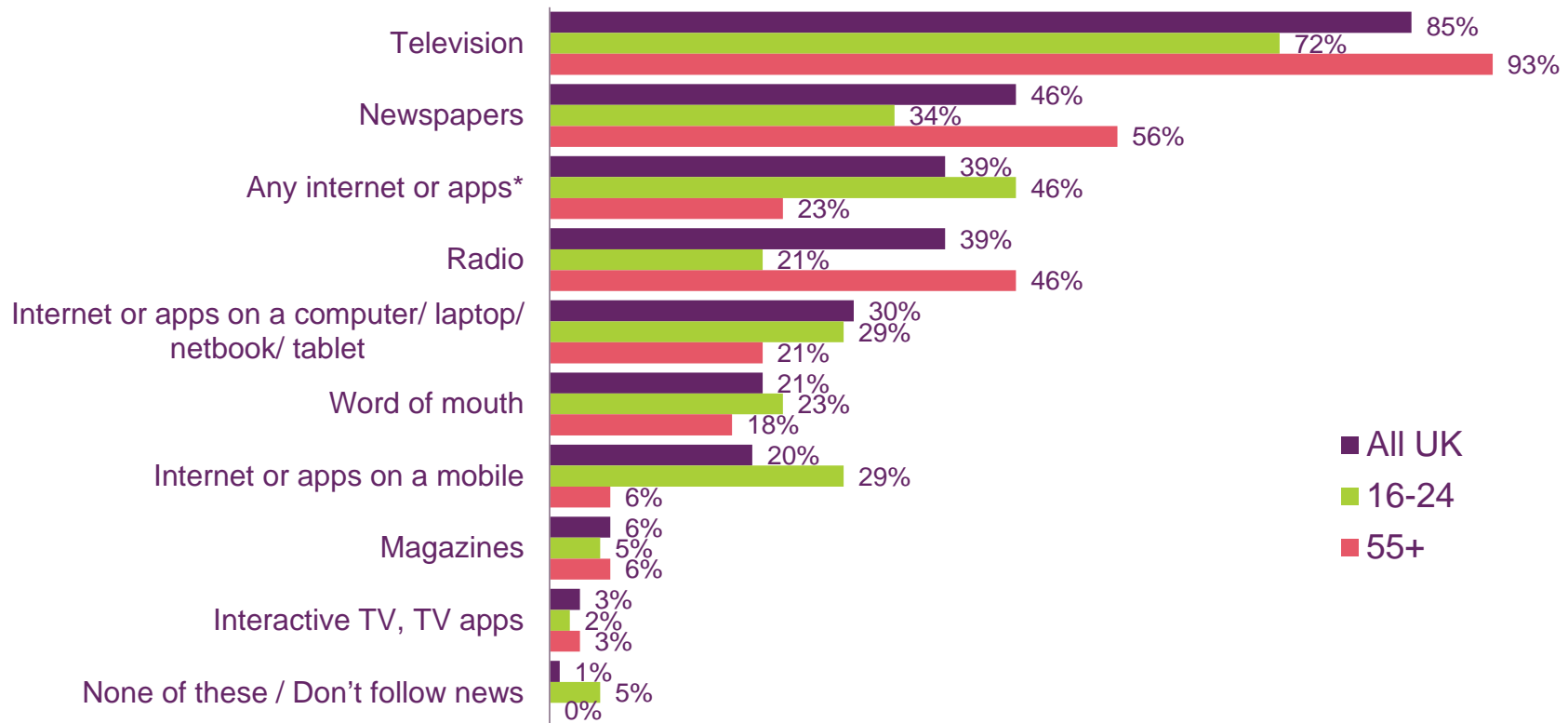


Source: comScore MobiLens, UK, 3 month averages ending March 2014 and March 2015
 Base: mobile internet users 13+

Figure 5.44

News consumption, by platform and age: 2015

% of adults in UK



Source: Ofcom Technology Tracker, W1 2015

Base: All adults aged 16+ (3756).

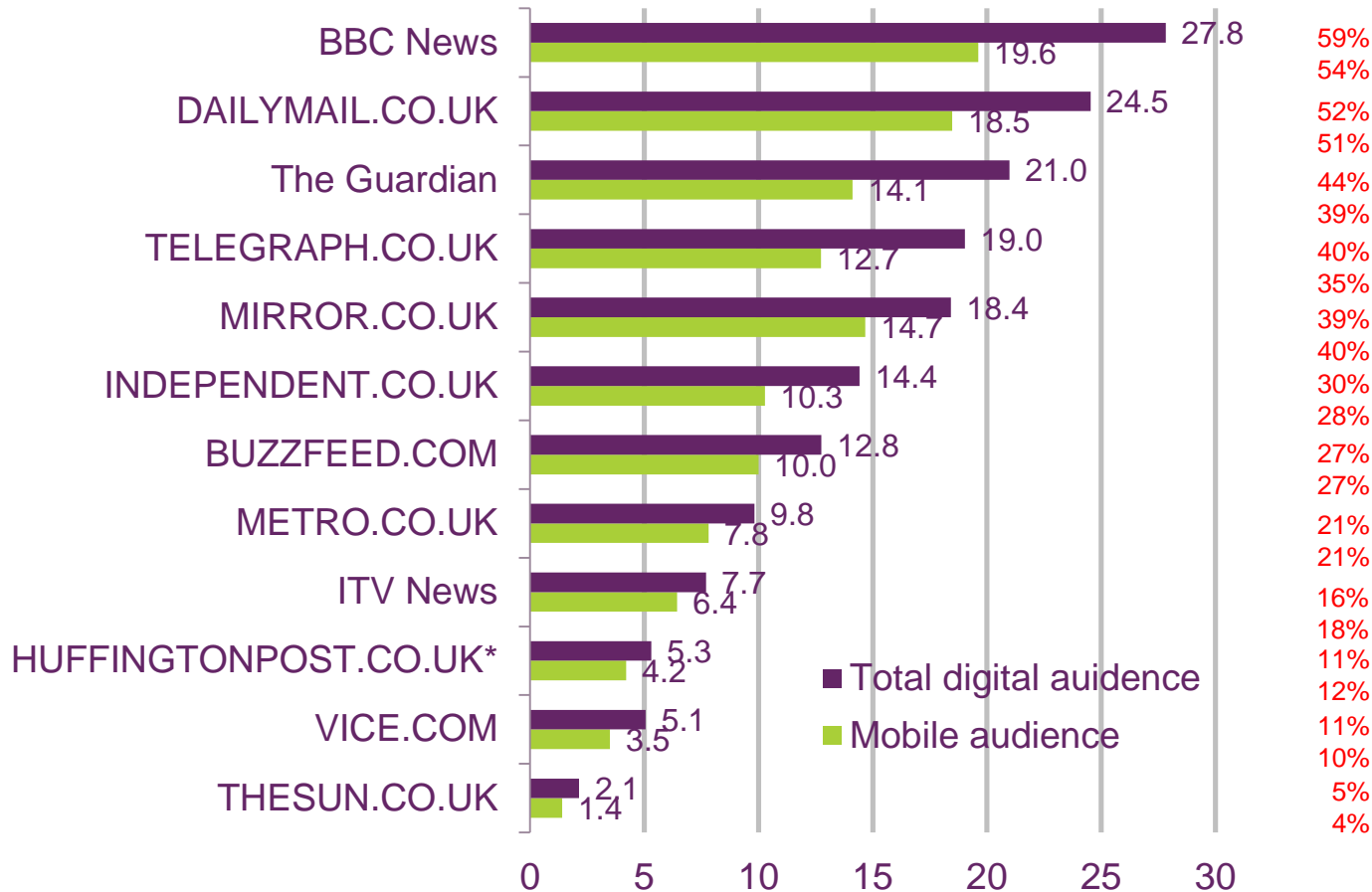
QN1: Which of the following do you use for news nowadays?

*Any internet or apps; aggregate of all internet devices.

Figure 5.45

Audience and reach of selected news services

Unique audience (million) / reach (%)

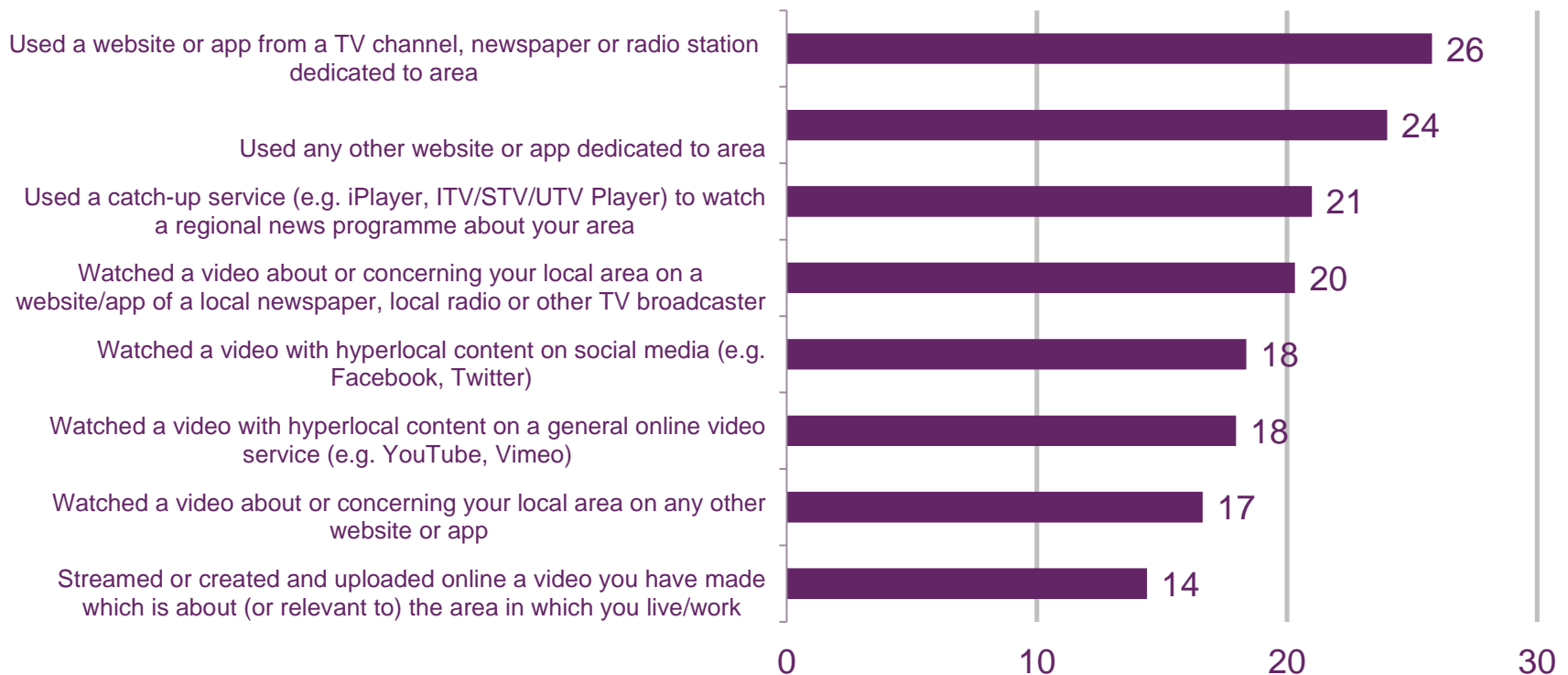


Source: comScore MMX-MP and MoMX, UK, March 2015. MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. Entities Note: comScore dictionary entities used were BBC News [C], DAILYMAIL.CO.UK [M], The Guardian [P], TELEGRAPH.CO.UK [M], MIRROR.CO.UK [C], INDEPENDENT.CO.UK [P], BUZZFEED.COM [P], METRO.CO.UK [M], ITV News [M] HUFFINGTONPOST.CO.UK* [C], VICE.COM [M], THESUN.CO.UK [C]. * Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Figure 5.46

Use of online media for local area

% respondents



Source: YouGov, Audio visual consumption survey 2015, May 2015

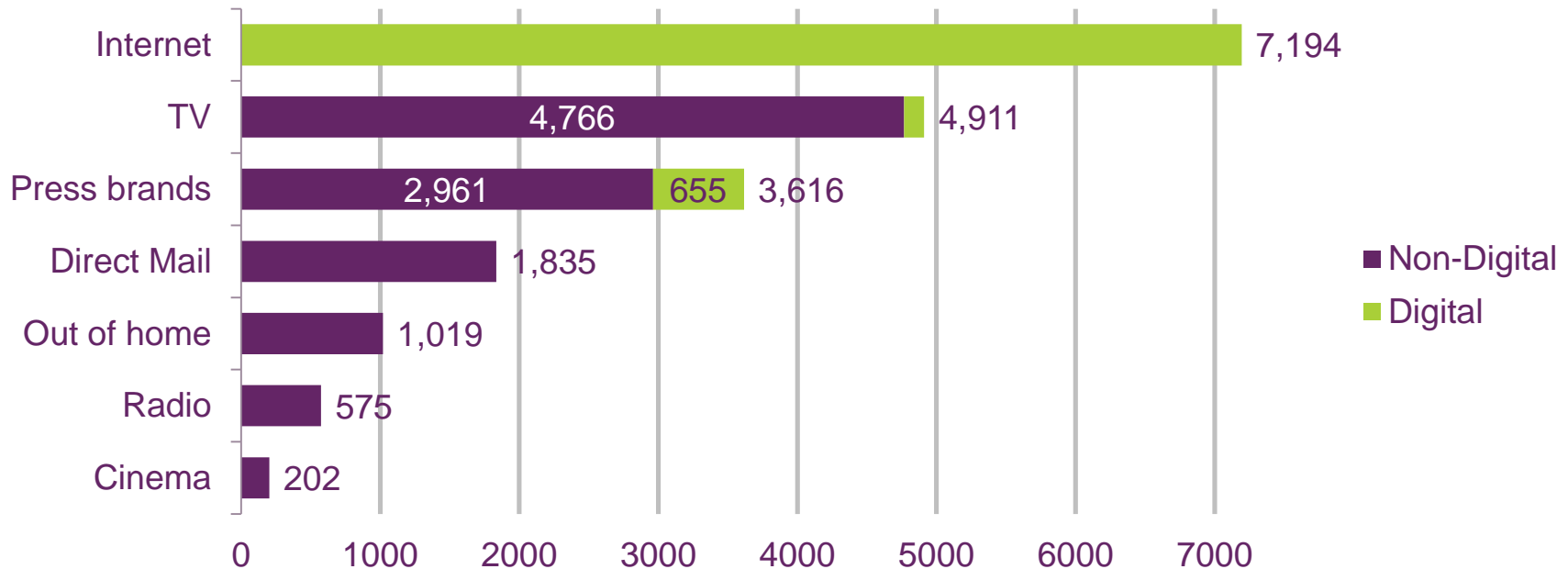
Base: Online UK adults 16+ (2114),

q. q39_rc. We'd now like to ask about 'hyperlocal' content. This means news or content services pertaining to a town, village, single postcode or other small, geographically defined community. In relation to the area where you currently either live or work (or have done in the past) have you

Figure 5.47

UK advertising expenditure: 2014

Expenditure (£ millions)



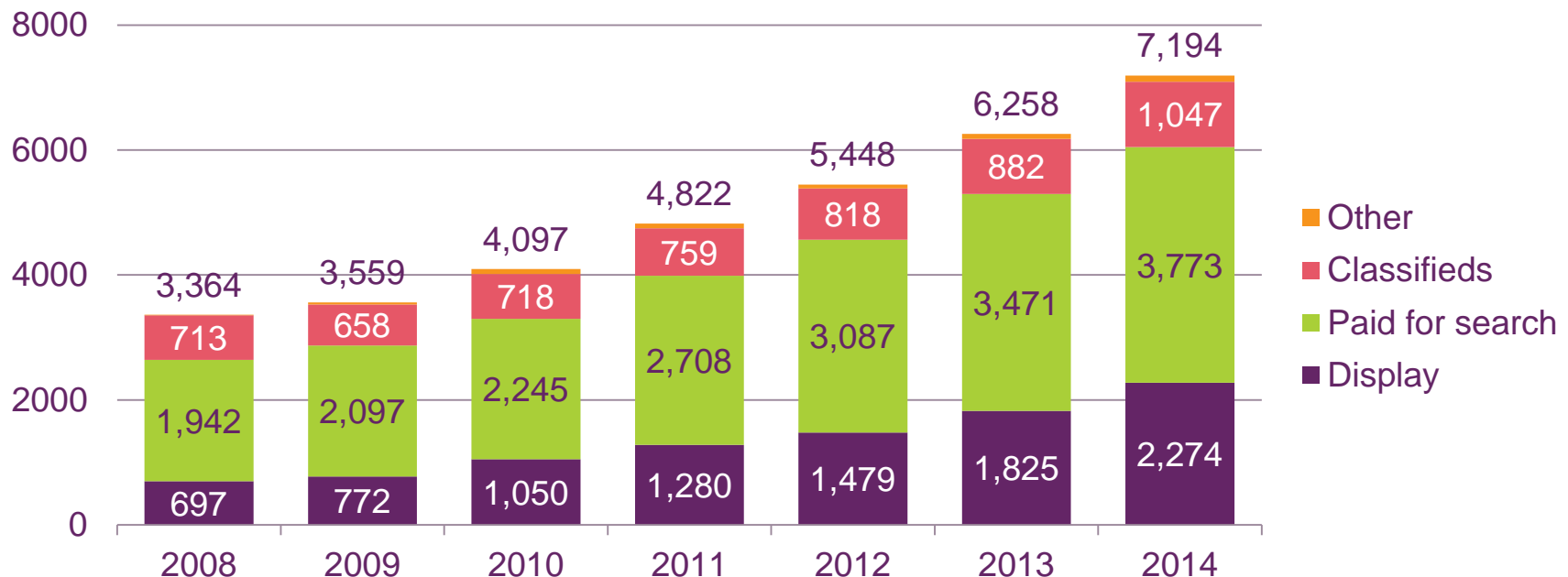
Source: AA/Warc Expenditure Report, April 2015

Note: 'Press brands' is a consolidation of magazine brands and national and regional news brands. Total digital advertising spend is double-counted in digital TV spend (broadcaster VOD revenue), and in press brands' digital spend.

Figure 5.48

Digital advertising expenditure, by type: 2008 - 2014

£ millions



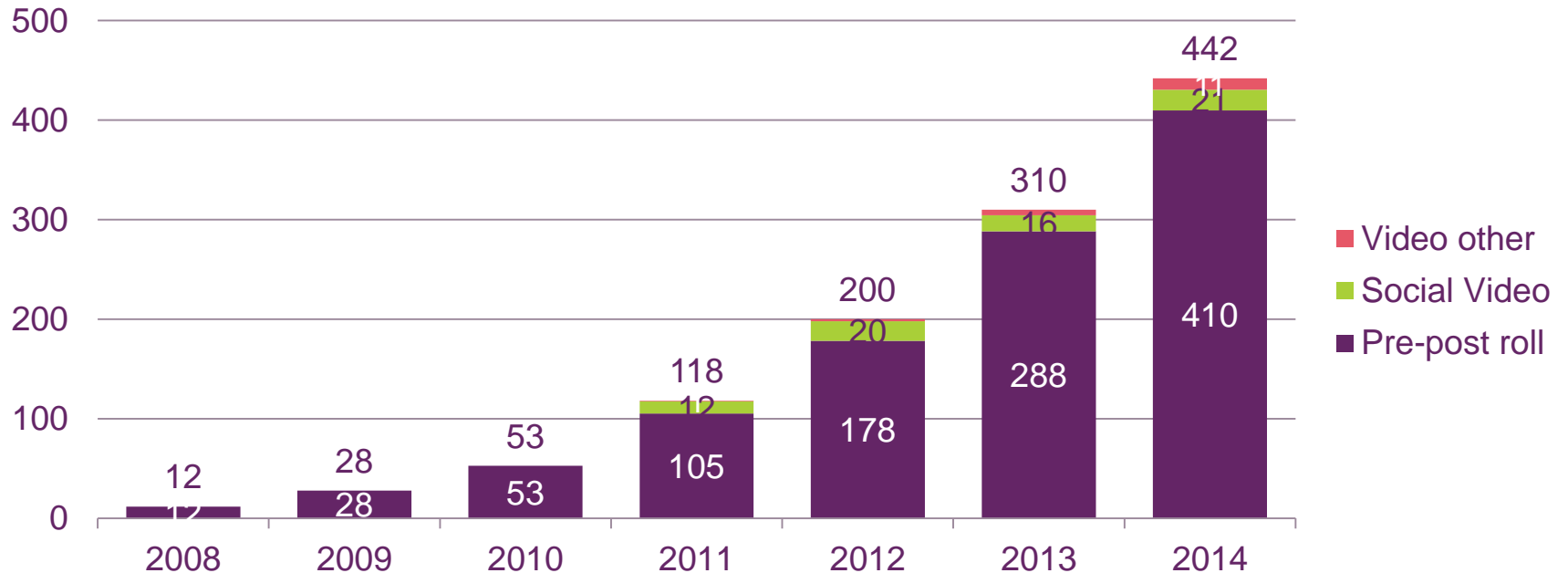
Source: IAB / PwC Digital Adspend Study 2008-2014

Note: 'Content and native advertising' was included as a new format for 2014; before this the revenue would have sat elsewhere within display (e.g. sponsorships).

Figure 5.49

Digital display video advertising revenue

£ millions

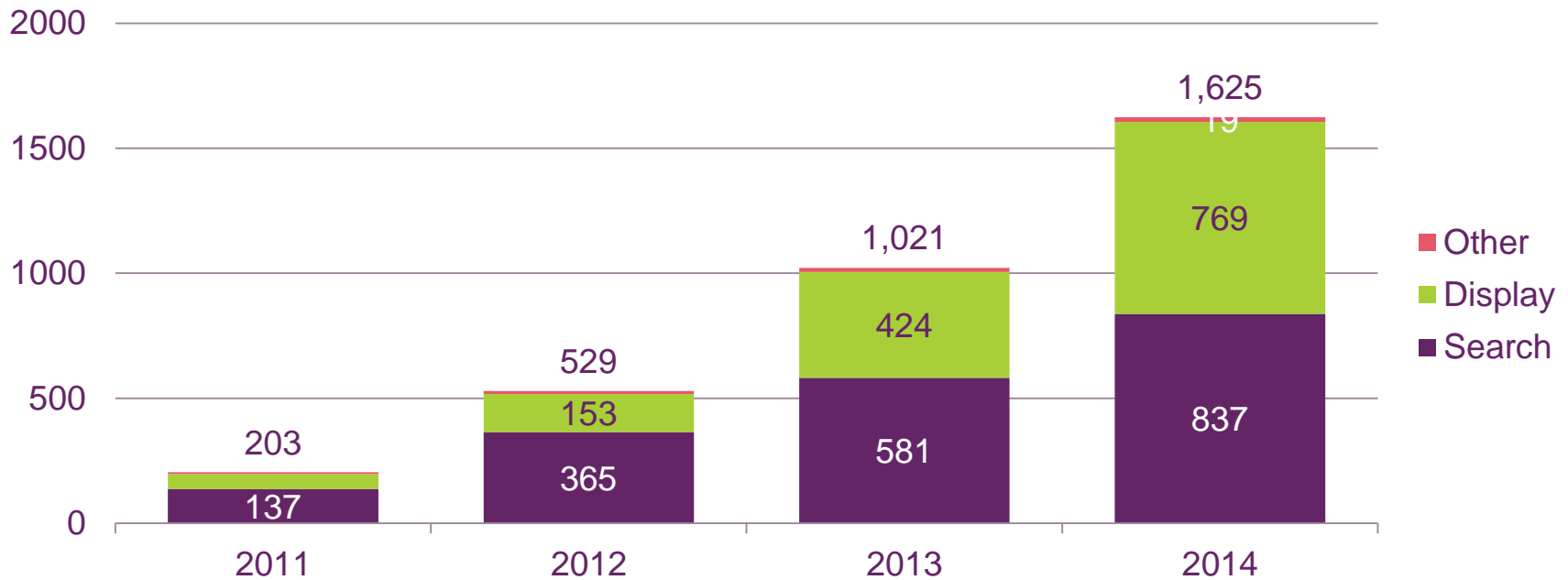


Source: IAB / PwC Digital Adspend Study 2008-2014

Figure 5.50

Mobile advertising expenditure: 2011 - 2014

£ millions



Source: IAB / PwC Digital Adspend Study 2011 – 2014