

Figure 5.1

Internet and web-based content: key international statistics

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN
Online universe (m)*	39.1	44.9	44.9	25.7	195	n/a	59.5	14.6	25.0	n/a	n/a	n/a	n/a	39.3	n/a	n/a	n/a
Fixed broadband connections per 100 HH†	70	69	62	49	71	80	64	66	56	85	66	63	40	21	29	4	26
Cellular broadband connections per 100 HH†	16	7	3	16	30	20	19	27	11	7	29	13	9	n/a	n/a	n/a	n/a
Mobile-only broadband HH (%)‡	6	1	11	13	6	n/a	6	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Internet access via a mobile phone(%)‡	37	37	27	31	36	n/a	70	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Source: IDATE / Industry Data / Ofcom, The Nielsen Company

*The Nielsen Company, month of July 2010, home and work panel, applications included.

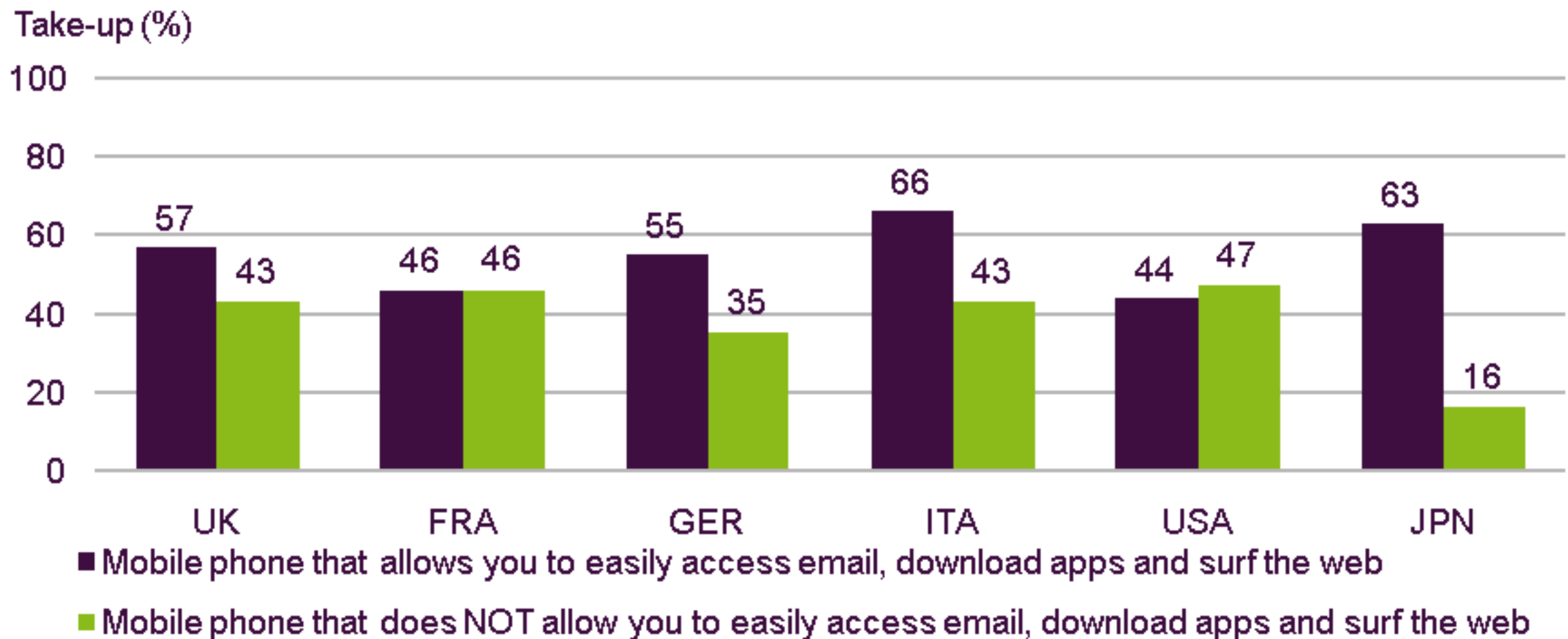
†IDATE / Industry Data / Ofcom, 2009.

‡Ofcom international research, October 2010.

Note: Nielsen is investigating a decline in its Internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen Internet data for 2010 is likely to represent a lower bound and should be treated as indicative only

Figure 5.2

Mobile phone take up by functionality



Source: Ofcom research, October 2010.

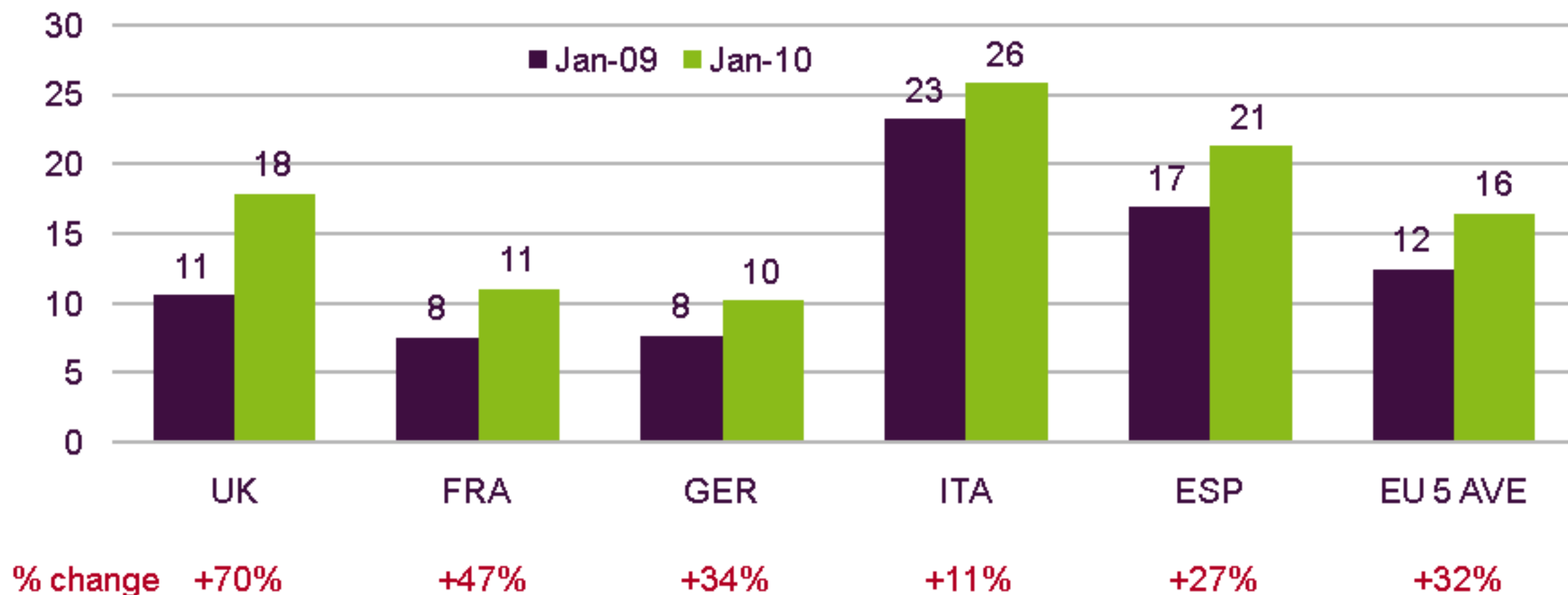
Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q4. Which of the following devices do you own and personally use?

Figure 5.3

Smartphone subscribers: January 2009 vs. January 2010

Smartphone subscribers aged 13+ per 100 population

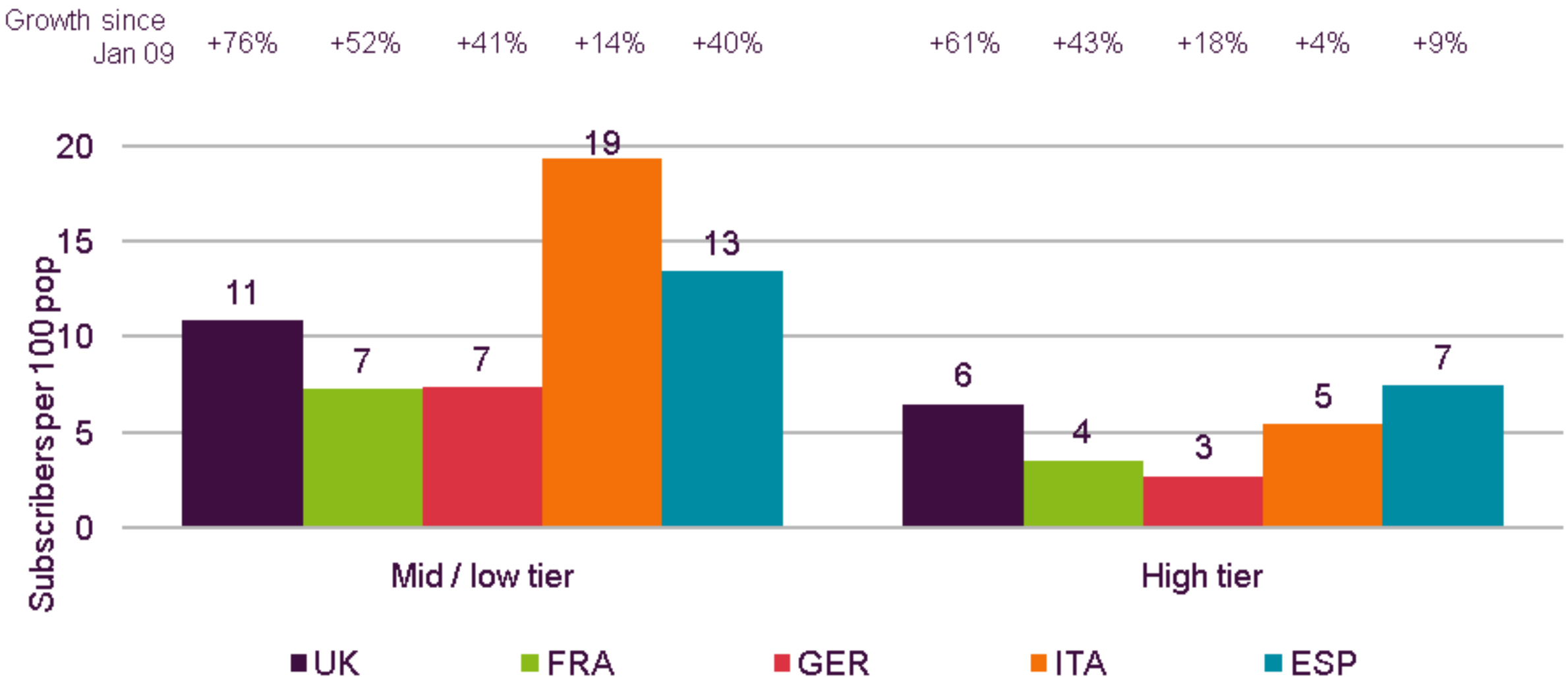


Source: comScore MobiLens / Ofcom calculations. Age 13+.

Note: Subscriber numbers based on 3-month average ending Jan 2010 vs. 3 month average ending Jan 2009. Population based on year-end figures for 2008 and 2009. EU 5 = UK, FRA, GER, ITA, ESP.

Figure 5.4

Smartphone subscribers by payment tier: Jan 2010

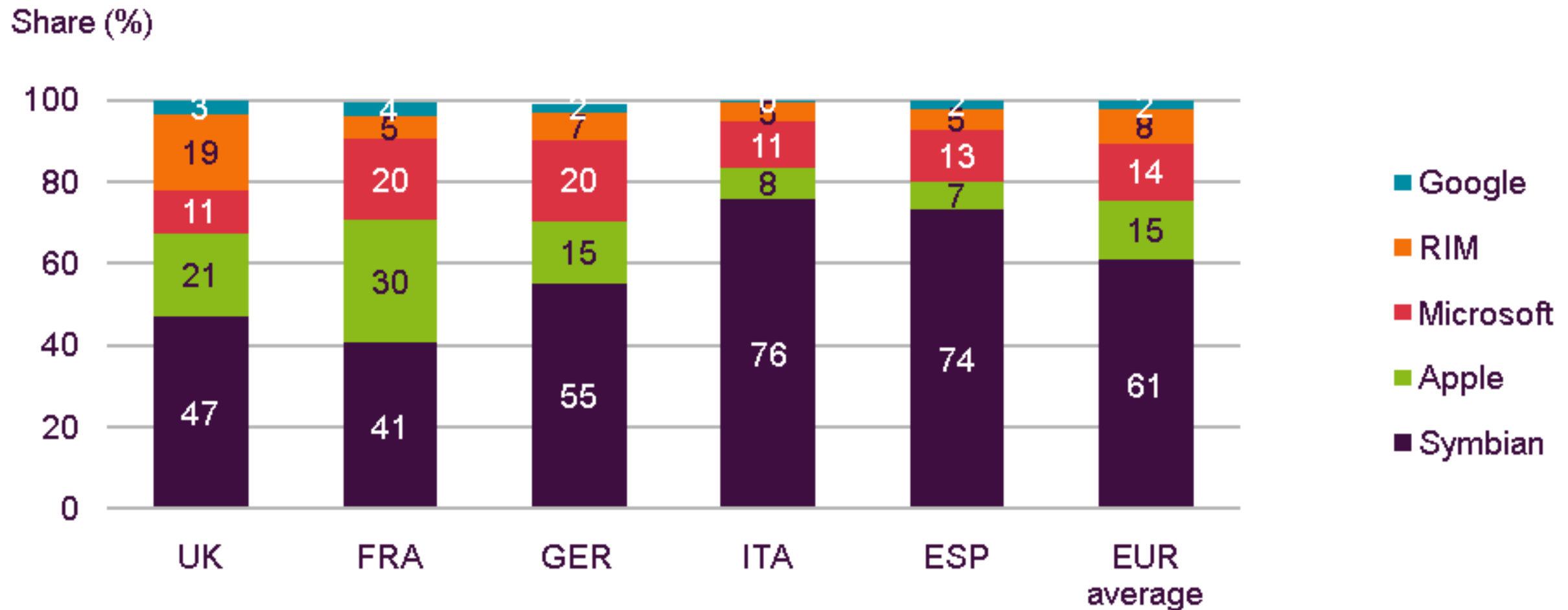


Source: comScore MobiLens / Ofcom calculations. Age 13+.

Note: Subscriber numbers based on 3 month average ending Jan 2010 vs. 3 month average ending Jan 2009. Population based on year-end figures for 2008 and 2009. High-tier pricing model includes smartphones with monthly subscription fees of over £35 in UK and over €50 in France, Germany, Spain and Italy. Totals do not necessarily match those in Figure 1.3 as some respondents do not disclose tariff information.

Figure 5.5

Smartphone subscribers by operating system, Jan 2010

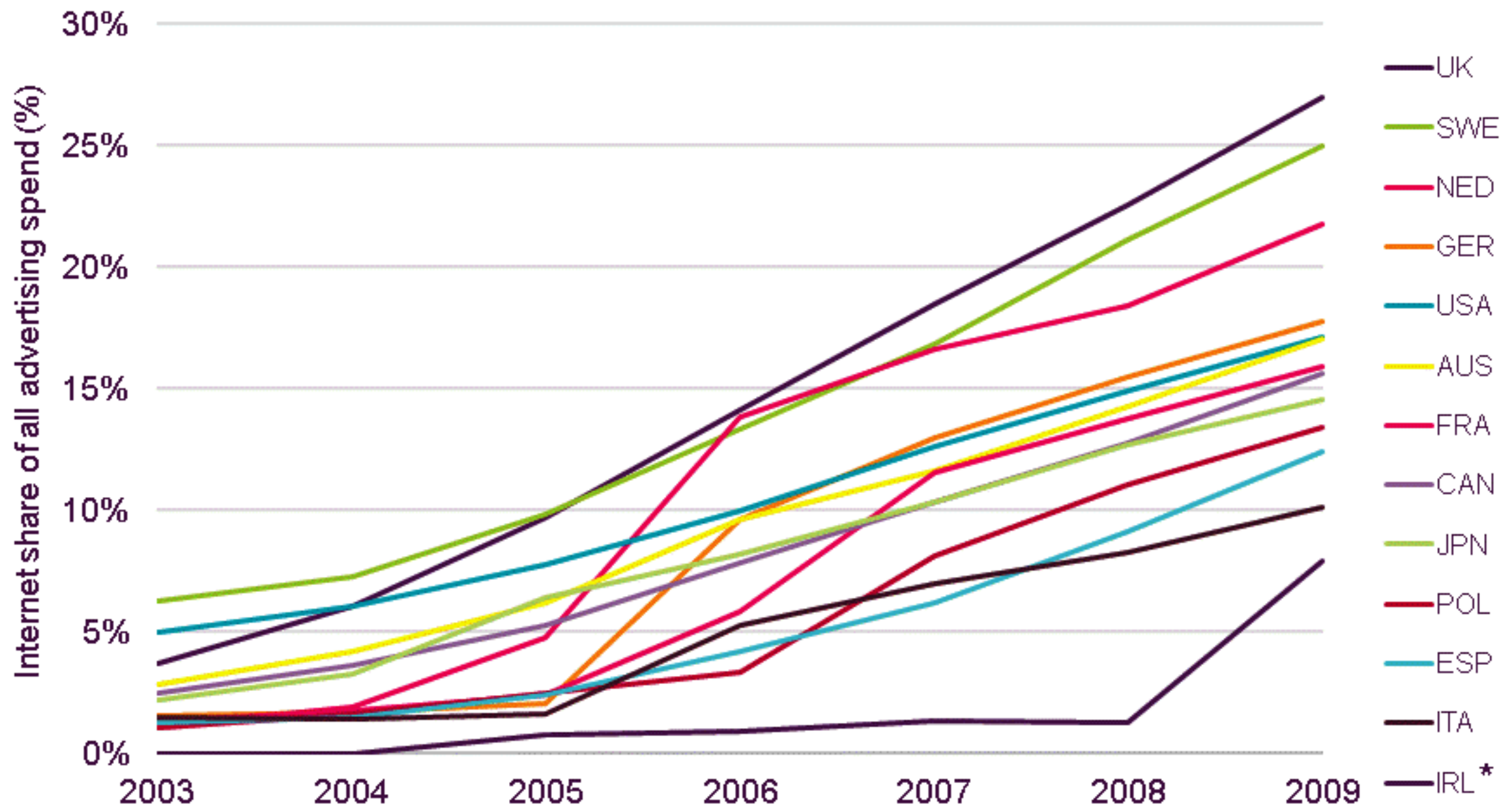


Source: comScore MobiLens. Age 13+.

Note: Shares based on 3-month average ending Jan 2010. EUR average = average across UK, FRA, GER, ITA, ESP.

Figure 5.6

Internet share of total advertising expenditure

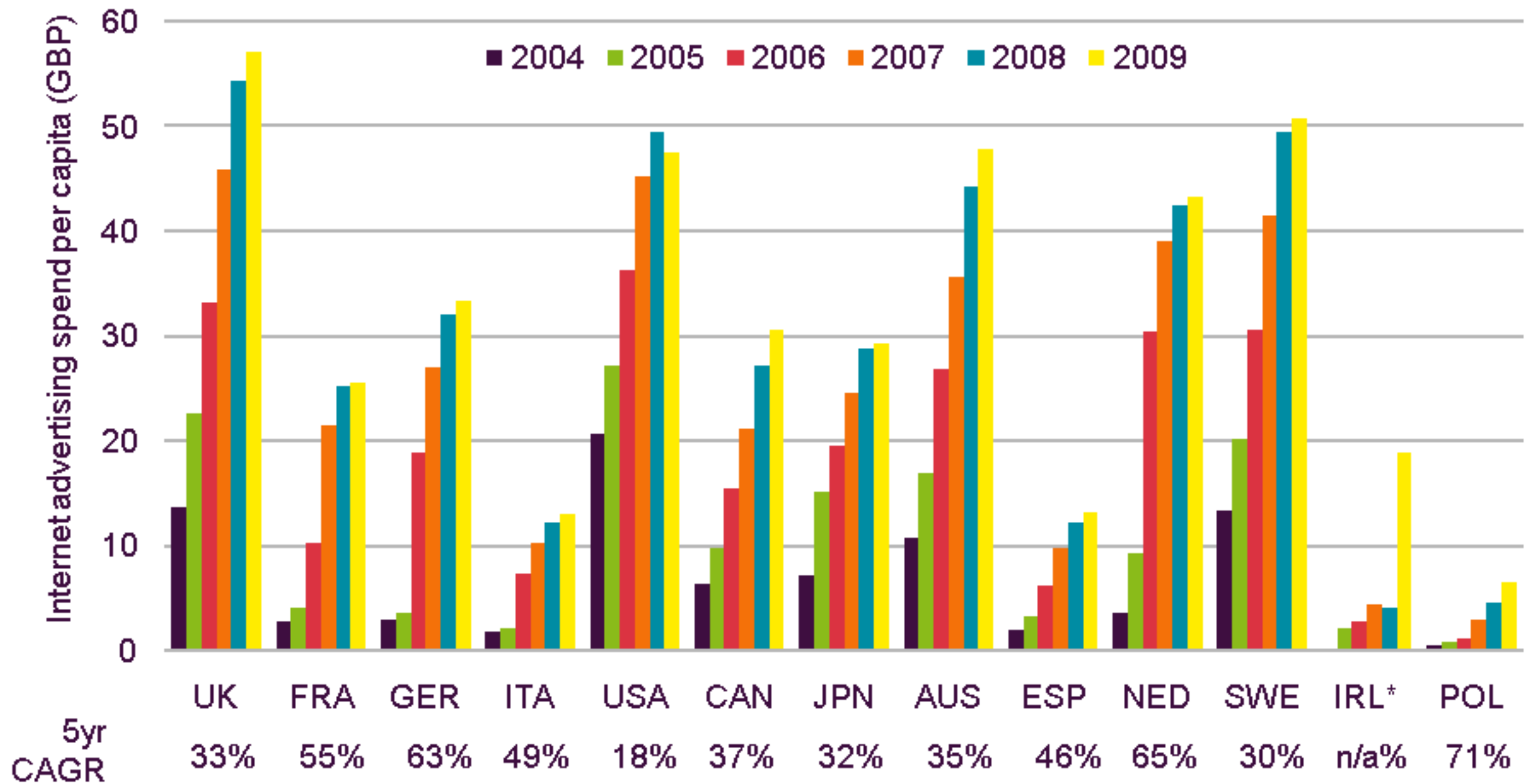


Source: Warc data (www.warc.com)

Note: Data do not include mobile advertising, a small but growing new market. This is particularly relevant to Japan where in 2009 mobile advertising accounted for approximately 2% of total advertising expenditure. *Ireland data prior to 2009 exclude paid-for search advertising. Ireland internet data from 2009 include display, classified, search and email and are therefore not directly comparable with those of previous years.

Figure 5.7

Internet ad spend per head



Source: Warc data (www.warc.com). Currency conversions represent the IMF average for 2009.

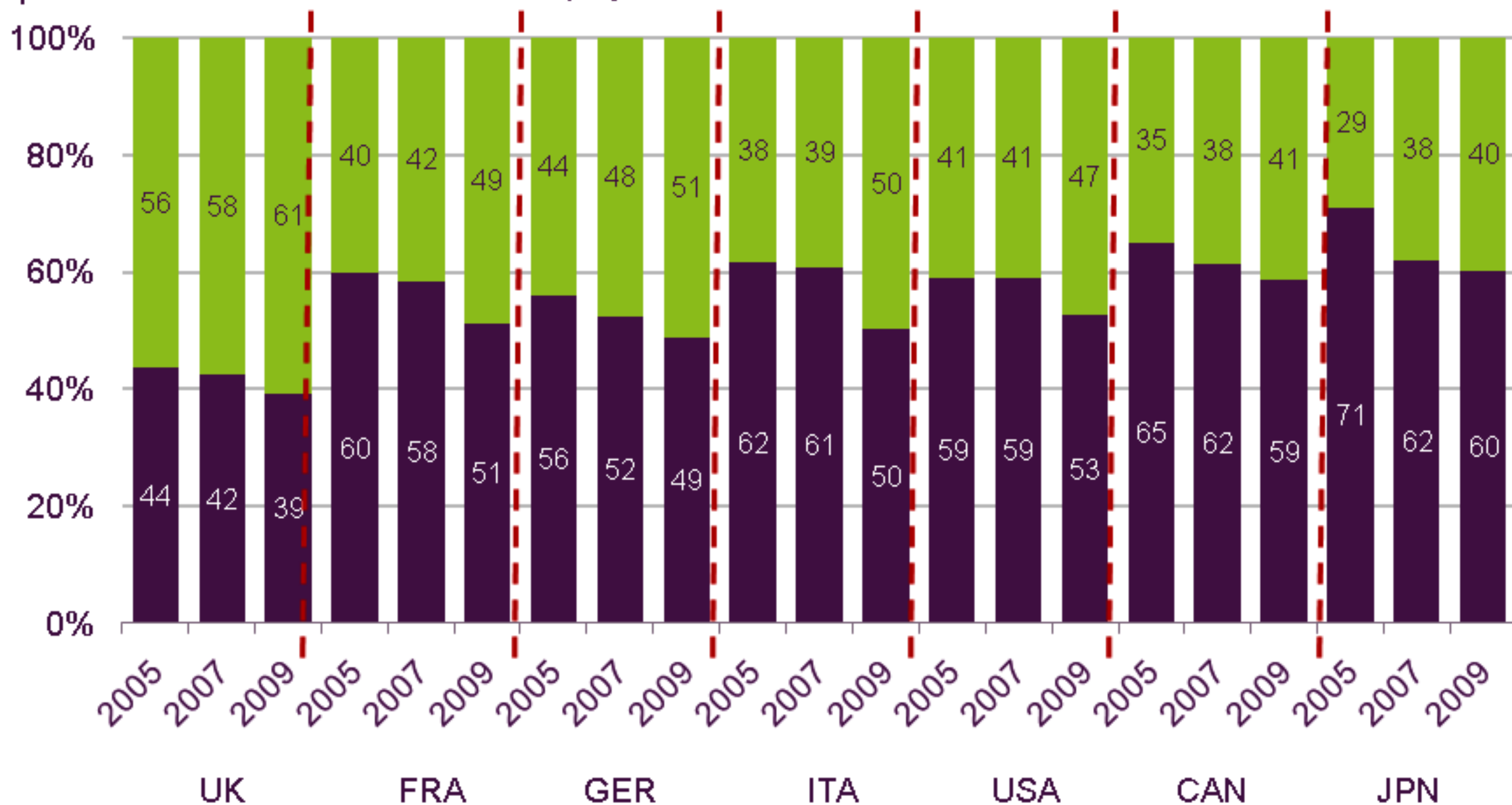
*Note: Ireland data prior to 2009 exclude paid-for search advertising. Ireland internet data from 2009 include display, classified, search and email and are not comparable with those of previous years.

Figure 5.8

Internet advertising spend, by category

% Internet ad spend

■ Display, Classified, other ■ Search

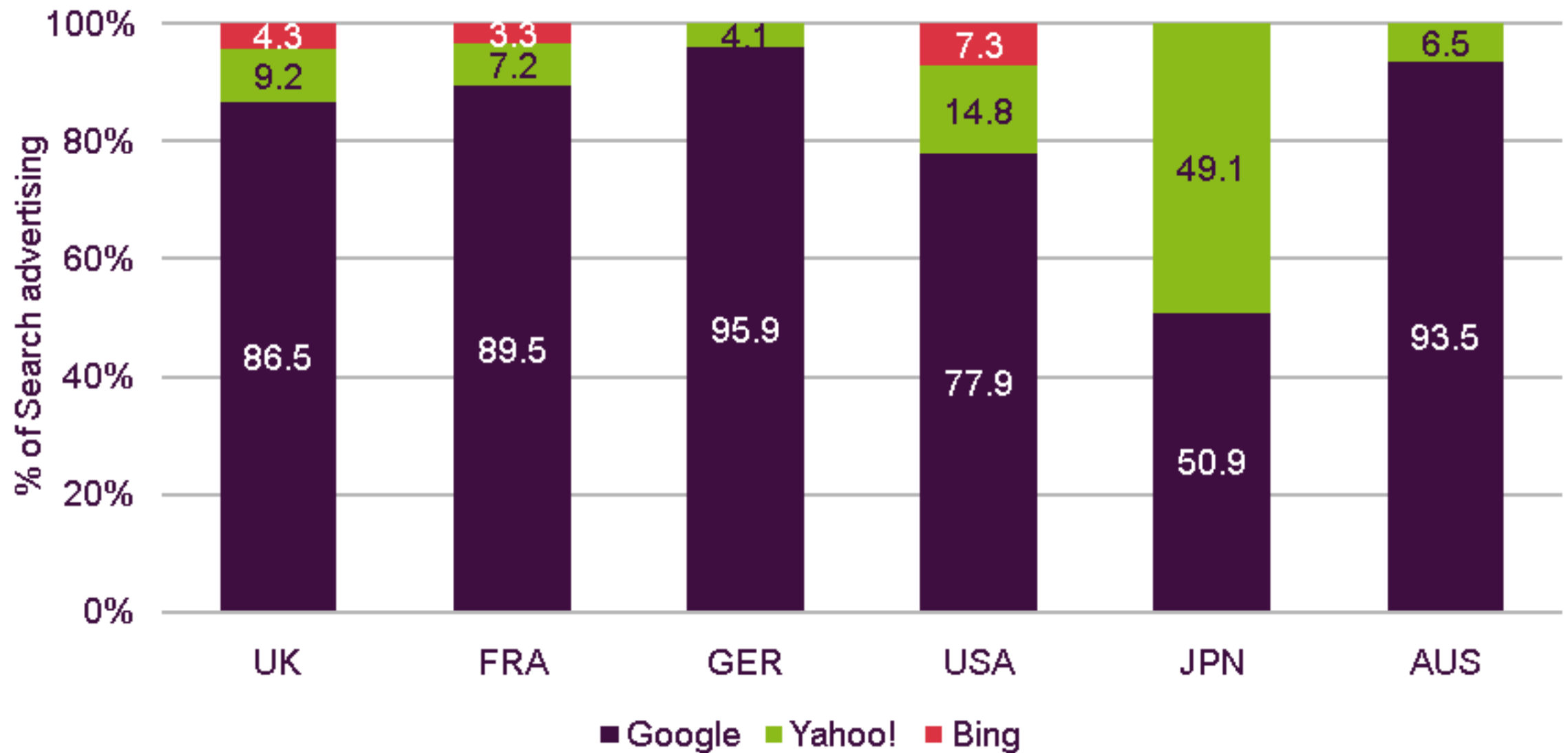


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2010-2014 @ www.pwc.com/outlook.

Note: Interpretation and manipulation of data are solely Ofcom's responsibility.

Figure 5.9

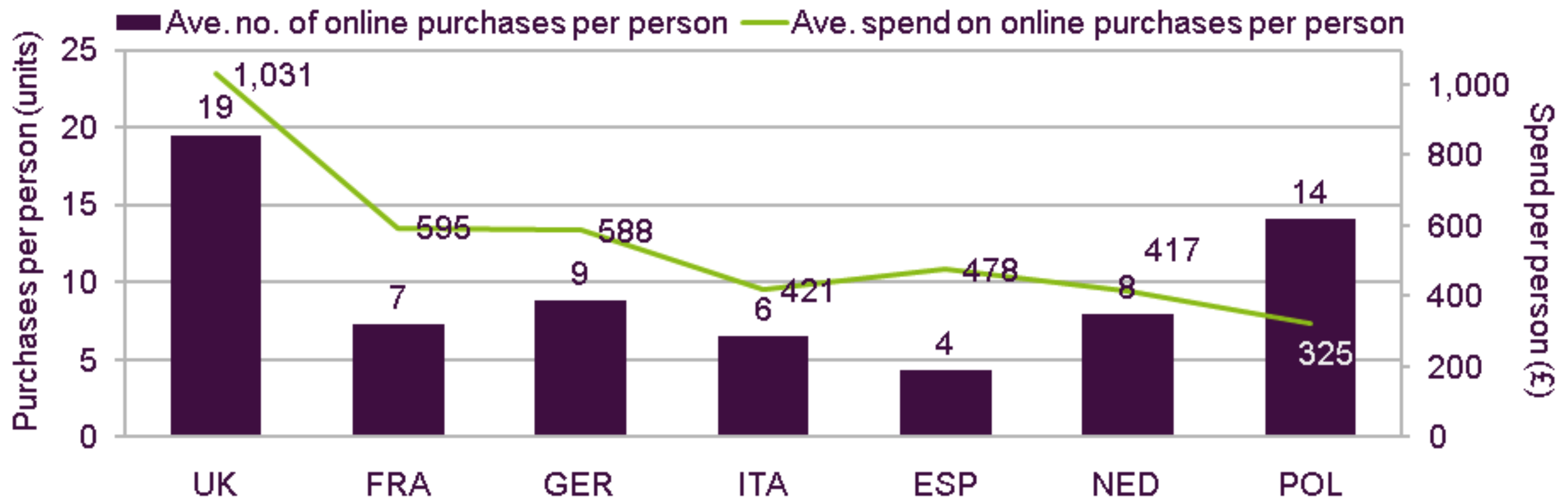
Share of search advertising market revenue



Source: <http://www.efrontier.com/sites/default/files/Digital-Marketing-Performance-Report-Q3-2010.pdf>

Figure 5.10

Online purchases and spend on online purchases in the past 6 months



Source: European Interactive Advertising Association (EIAA) Mediascope Europe 2010.

Q18. In the last six months*, how many purchases would you say you have made online?

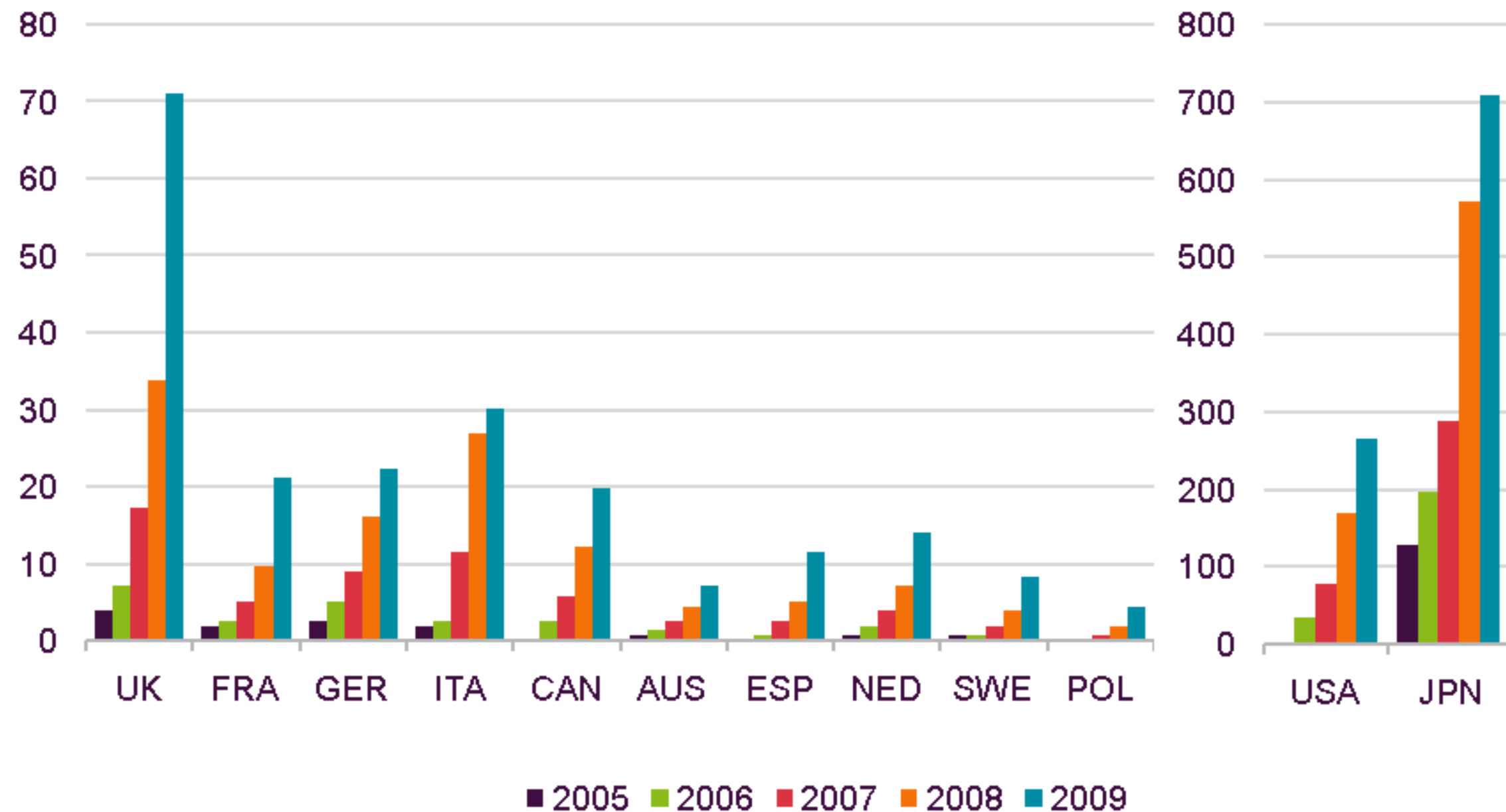
Q19. In the last six months*, approximately how much money would you say you spent in total on all your online purchases?

*June – November 2009

Figure 5.11

Mobile internet advertising expenditure

GBP Millions



GBP Millions

Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2010-2014 @ www.pwc.com/outlook.

Note: Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 5.12

Mobile behaviour in Japan, USA and Europe, June 2010

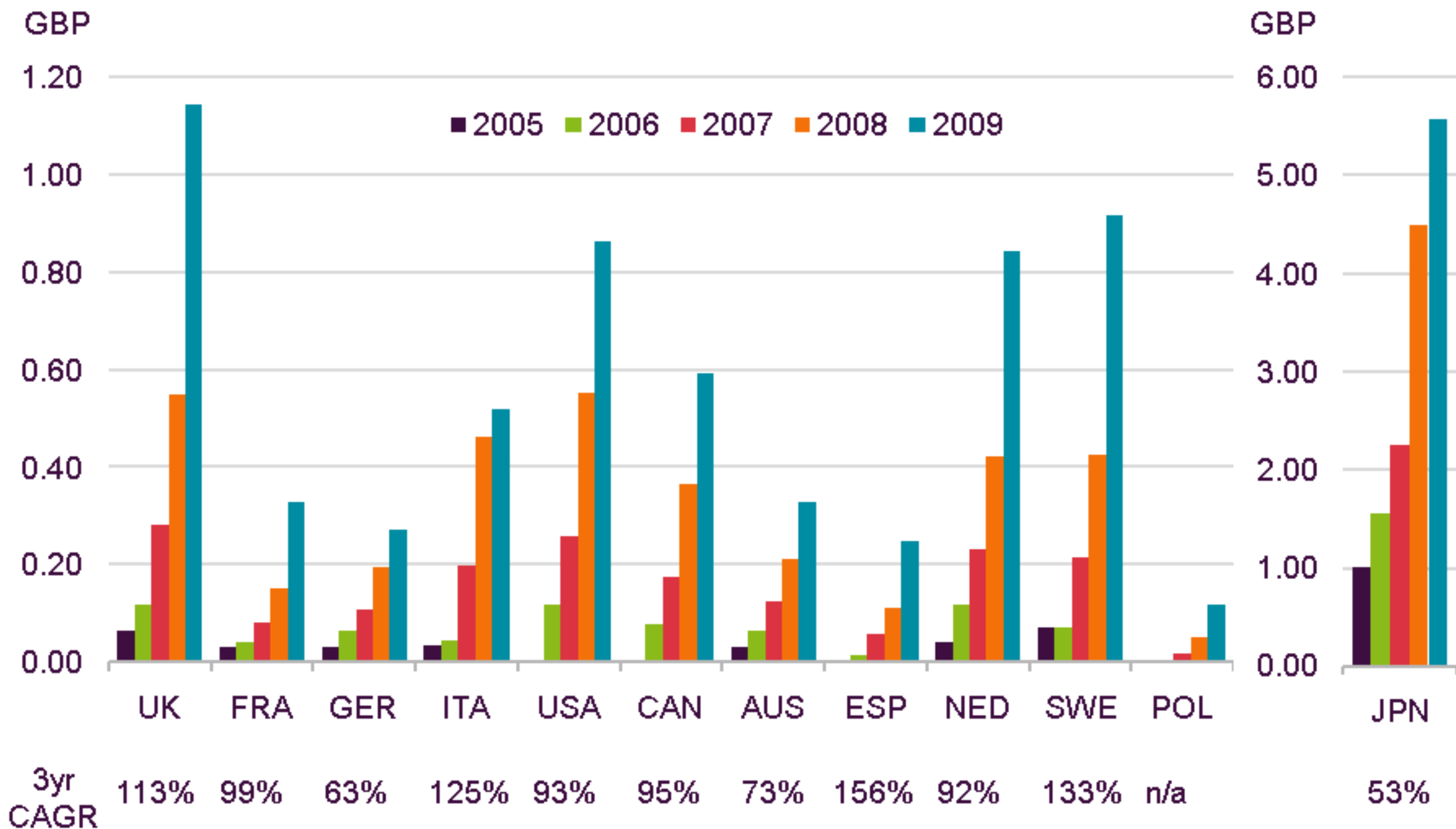
	Japan	USA	Europe
Used connected media (Browsed, Accessed Applications or Downloaded Content)	75.2%	43.7%	38.5%
Used browser	59.3%	34.0%	25.8%
Used application	42.3%	31.1%	24.9%
Watched TV and/or video on mobile phone	22.0%	4.8%	5.4%

Source: comScore MobiLens

Note: Europe denotes EU5 (UK, DE, FR, ES and IT) June 2010 Total Mobile Audience Age 13+ (http://www.comscore.com/Press_Events/Press_Releases/2010/10/comScore_Release_First_Comparative_Report_on_Mobile_Usage_in_Japan_United_States_and_Europe).

Figure 5.13

Mobile internet advertising expenditure per capita

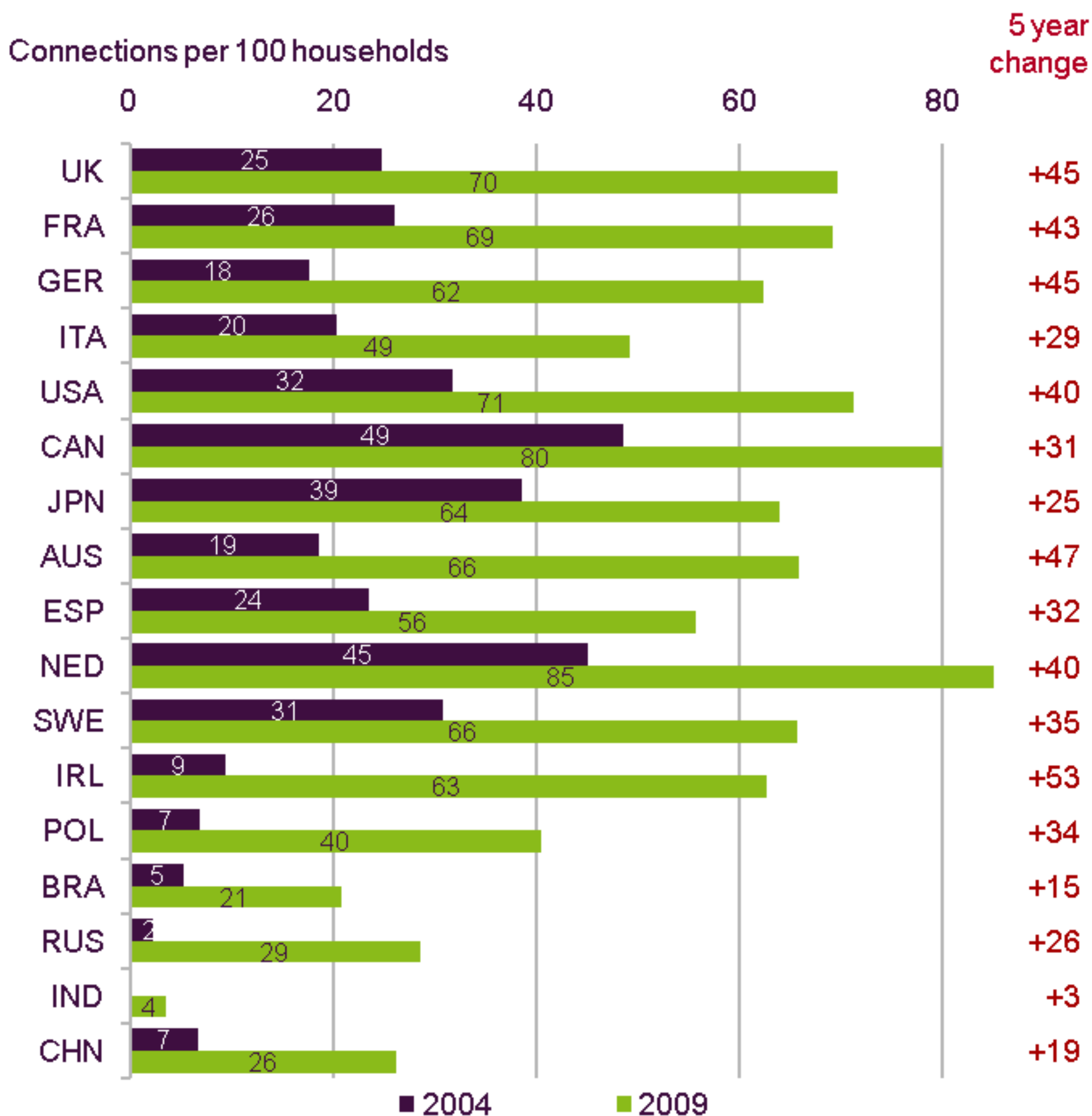


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2010-2014 @ www.pwc.com/outlook.

Note: Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.5643 to the GBP, representing the IMF average for 2009.

Figure 5.14

Broadband connections per 100 households



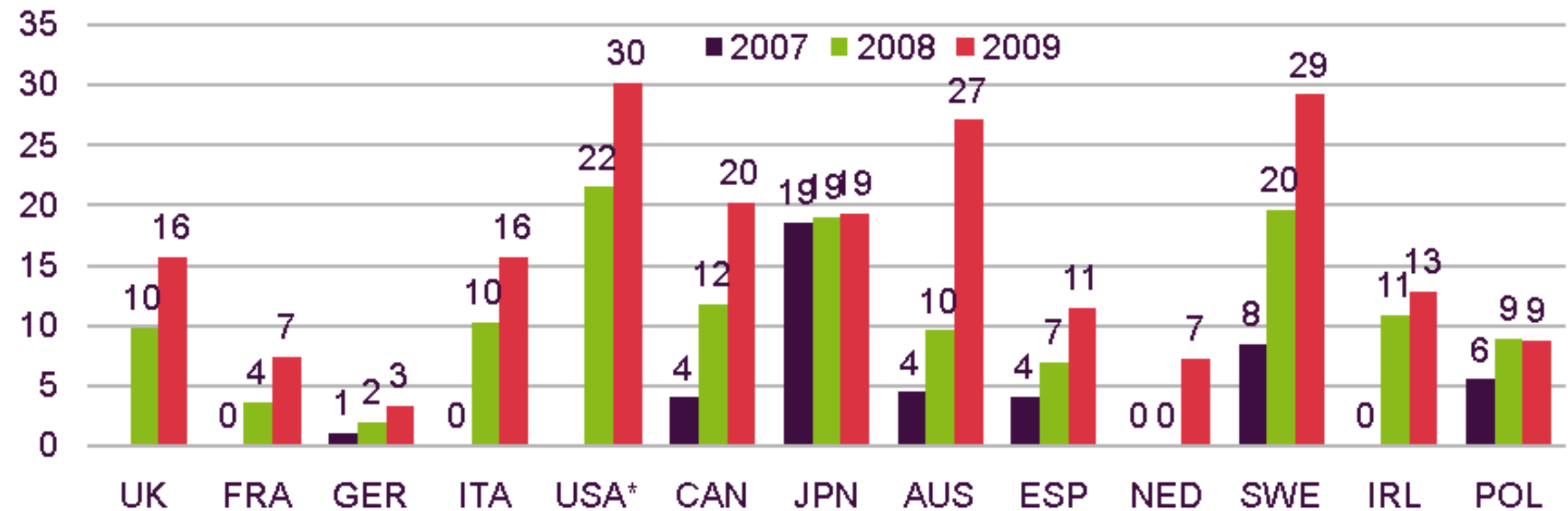
Source: IDATE / Industry data / Ofcom

Note: this calculation includes business broadband lines, and therefore the figures in the analysis do not equate exactly to household fixed broadband take-up.

Figure 5.15

Mobile broadband subscribers per 100 households

Mobile Broadband connections per 100 HH



08/09 growth: +61%, +105%, +71%, +53%, +40%, +71%, +2%, +183%, +64%, n/a, 49%, 18%, -2%

Source: IDATE / Industry data / Ofcom.

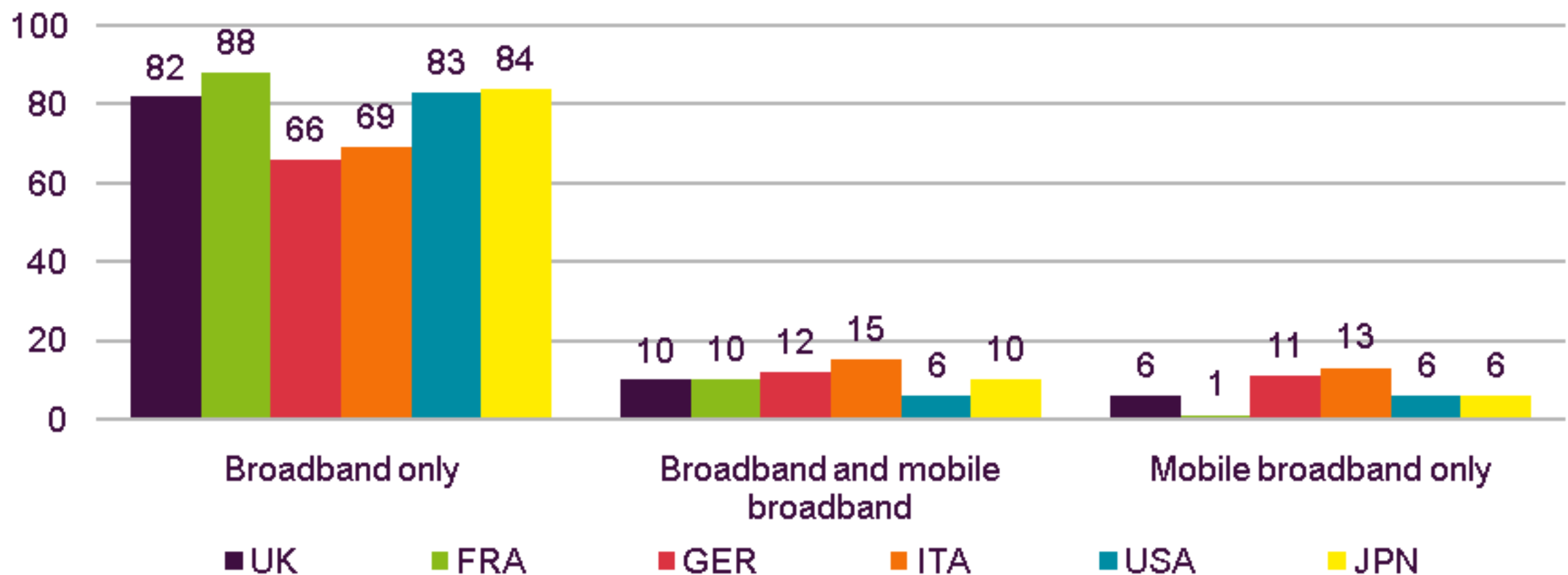
Note: this calculation includes business broadband lines, and therefore the figures in the analysis do not equate exactly to household fixed broadband take-up.

*USA data are unavailable for 2007 due to a change in the way mobile wireless internet access service connections were reported during 2008.

Figure 5.16

Take-up of home internet access platforms

Proportion of internet users (%)



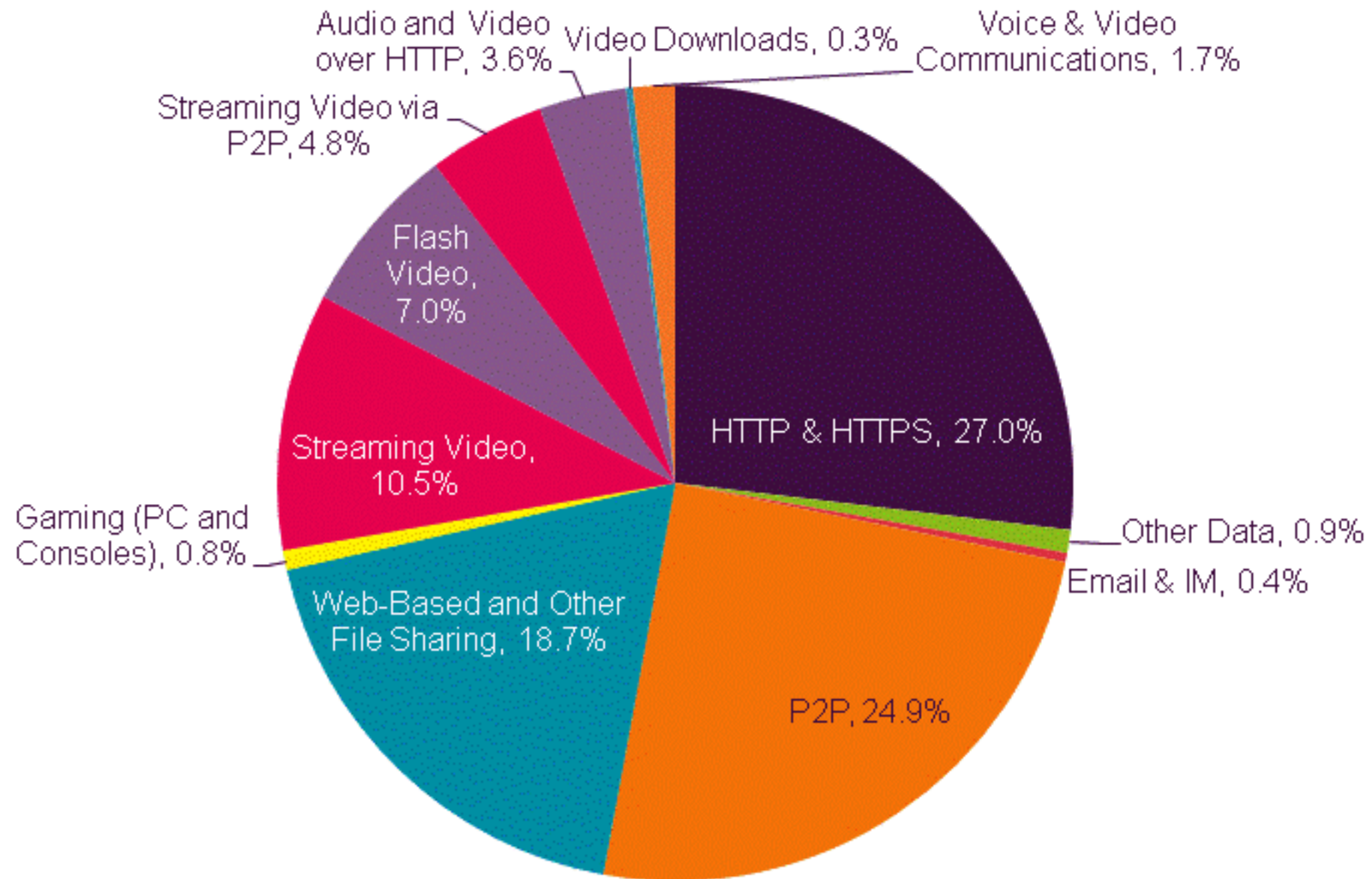
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q3. Which of the following do you have in your home?

Figure 5.17

Global Broadband Traffic by Application Category, Q3 2010

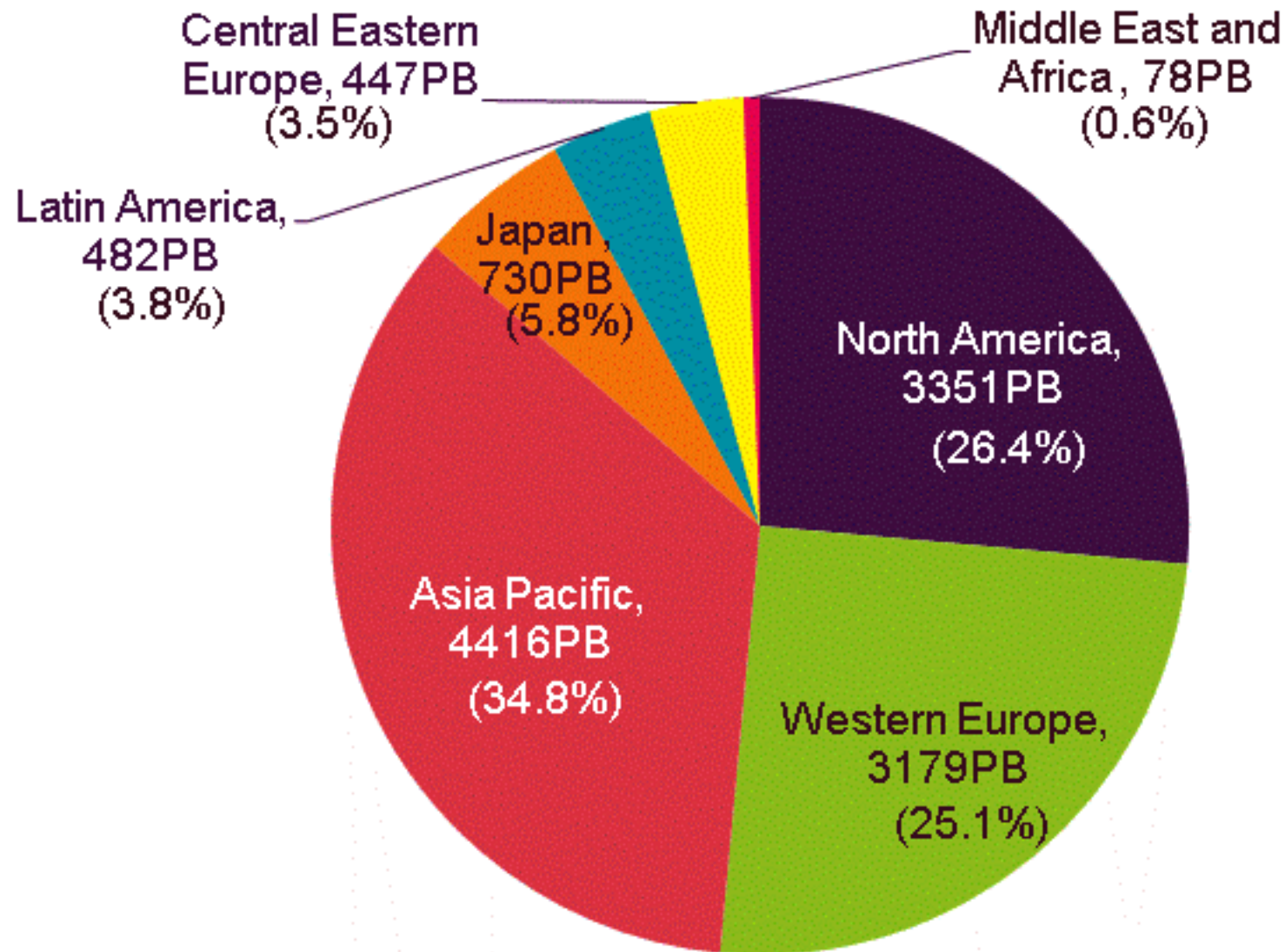


Source: Cisco Visual Network Index Usage Study, Q3, 2010.

(http://www.cisco.com/en/US/solutions/collateral/ns341/ns525/ns537/ns705/Cisco_VNI_Usage_WP.html).

Figure 5.18

Global Consumer broadband consumption by region, 2010



Source: Cisco Visual Networking Index Forecast, June 2nd 2010

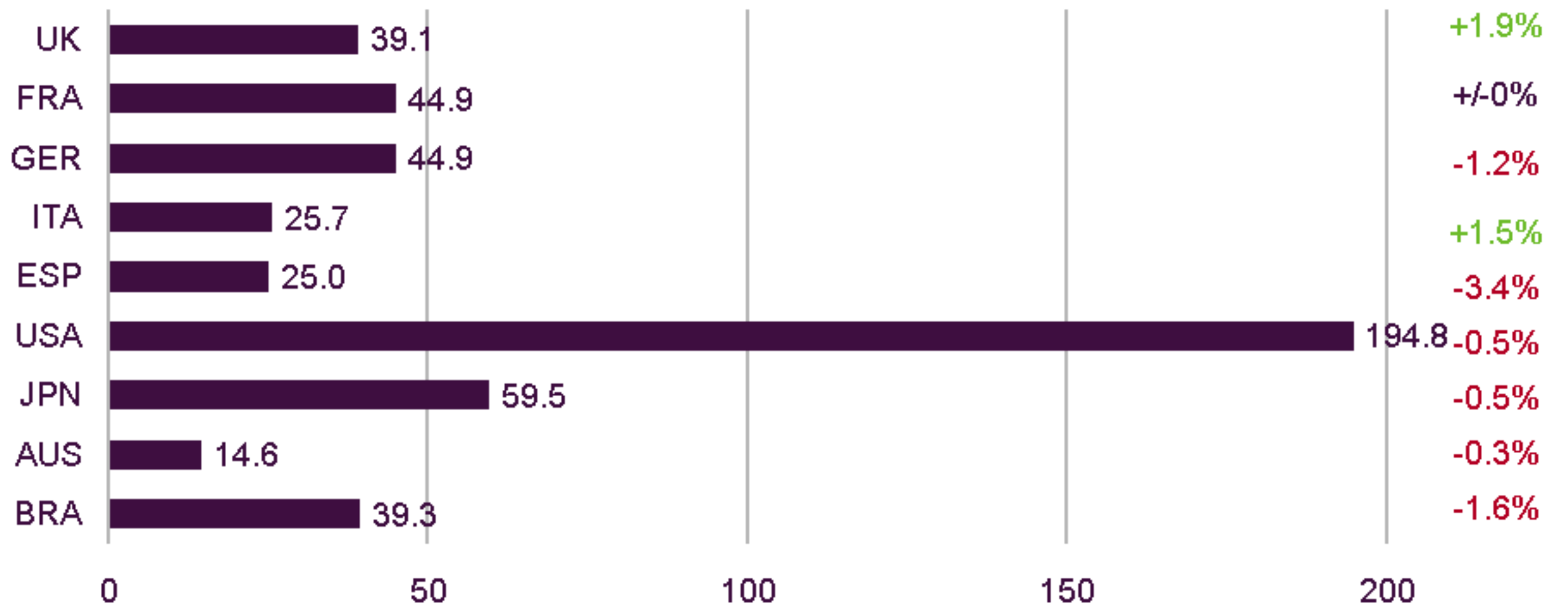
(http://www.cisco.com/en/US/solutions/collateral/ns341/ns525/ns537/ns705/ns827/white_paper_c11-481360.pdf)

Note: PB denotes petabyte, approximately equal to 1,024 terabytes or 1.048 million gigabytes.

Figure 5.19

Global online universe, July 2010

Global online universe (m)



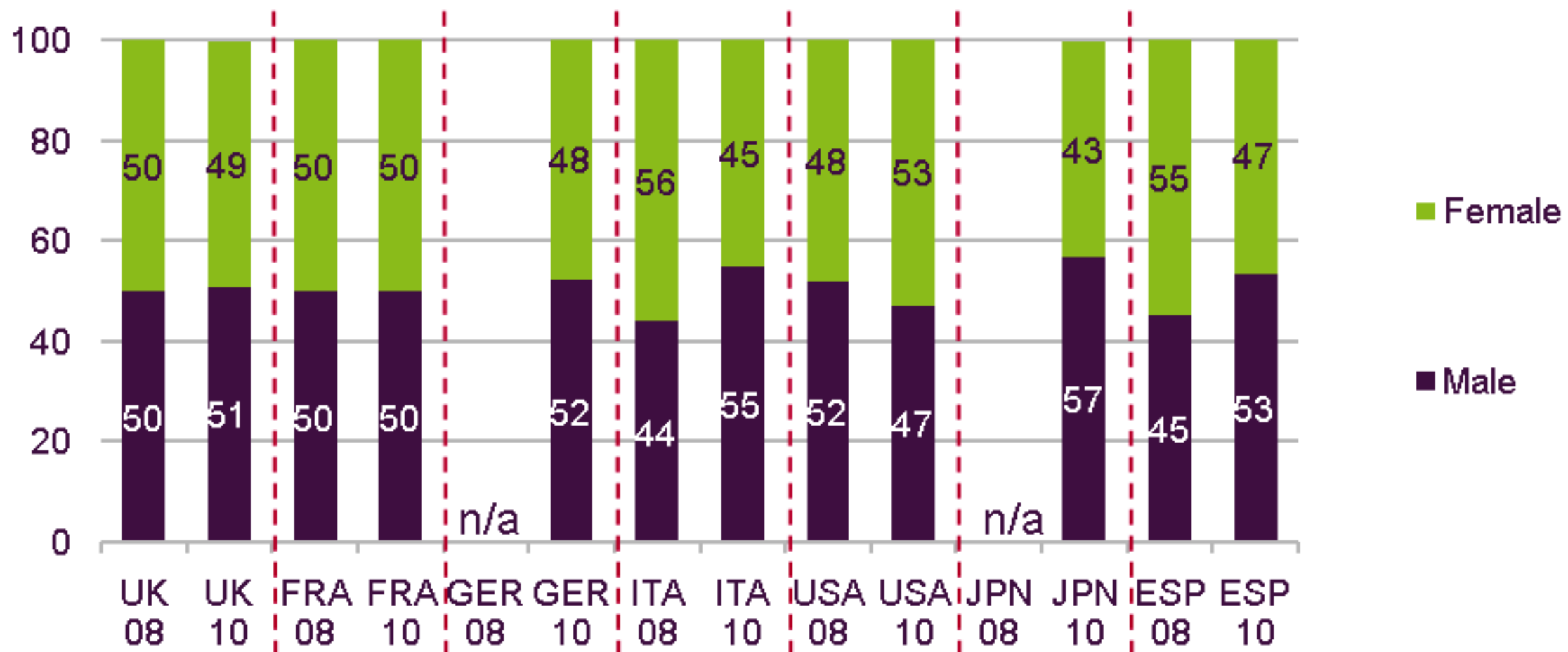
Source: The Nielsen Company, Jul 10 (Internet Applications Included, Home & Work).

Note: Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.20

Unique online audience, by gender, August 2008 and August 2010

Share of online audience (%)

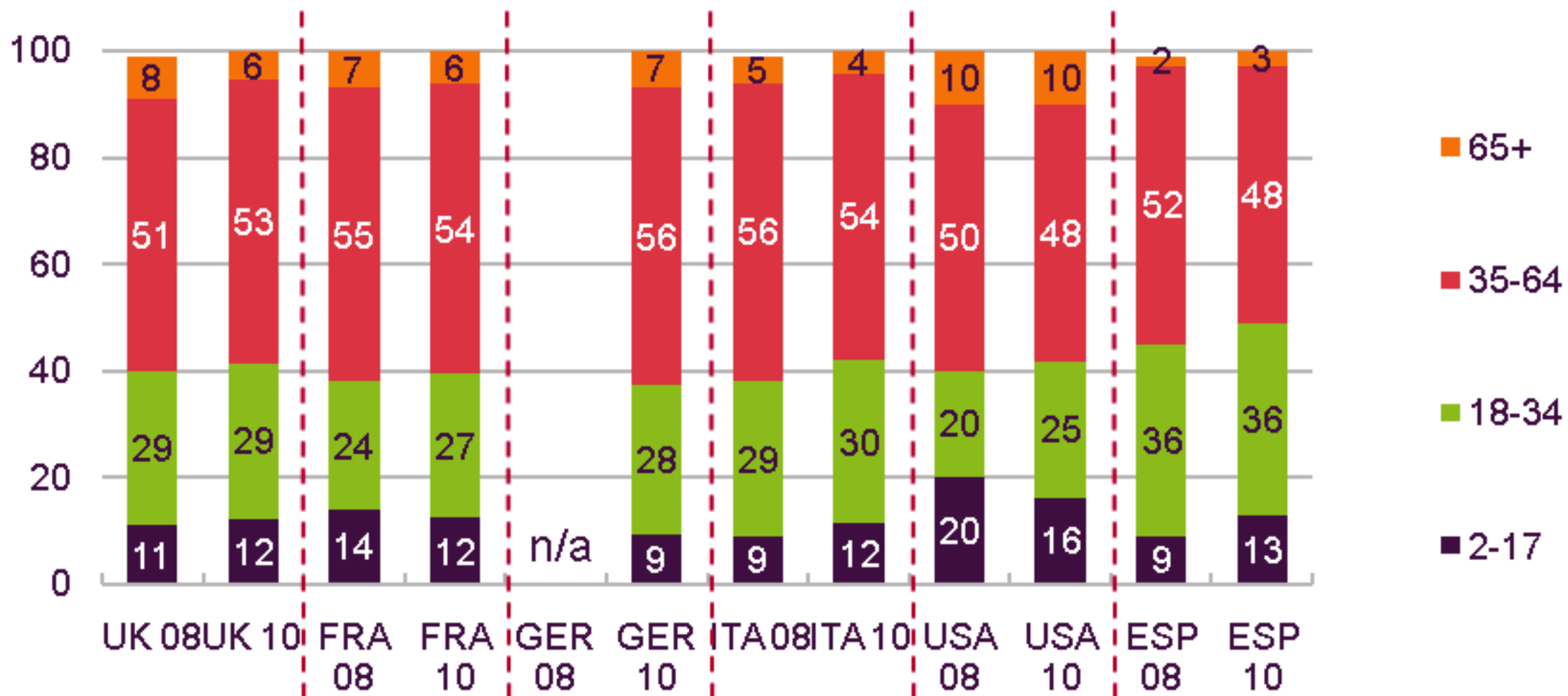


Source: The Nielsen Company, August 2008 and August 2010, home and work panel, applications included.

Figure 5.21

Unique online audience by age, August 2008 and August 2010

Share of online audience (%)

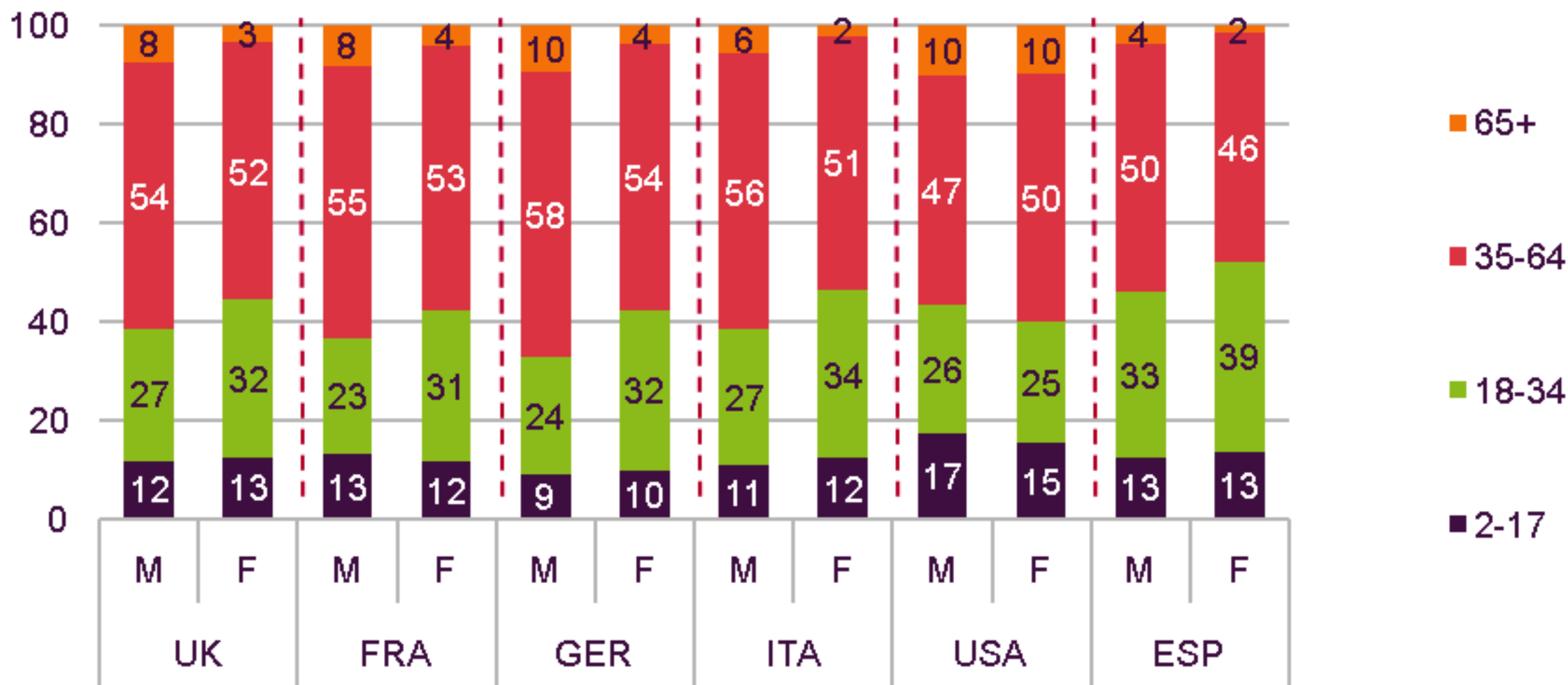


Source: The Nielsen Company, August 2008 and August 2010, home and work panel, applications included.

Note: Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.22

Unique online audience, by age and gender, August 2010
Share of online audience (%)



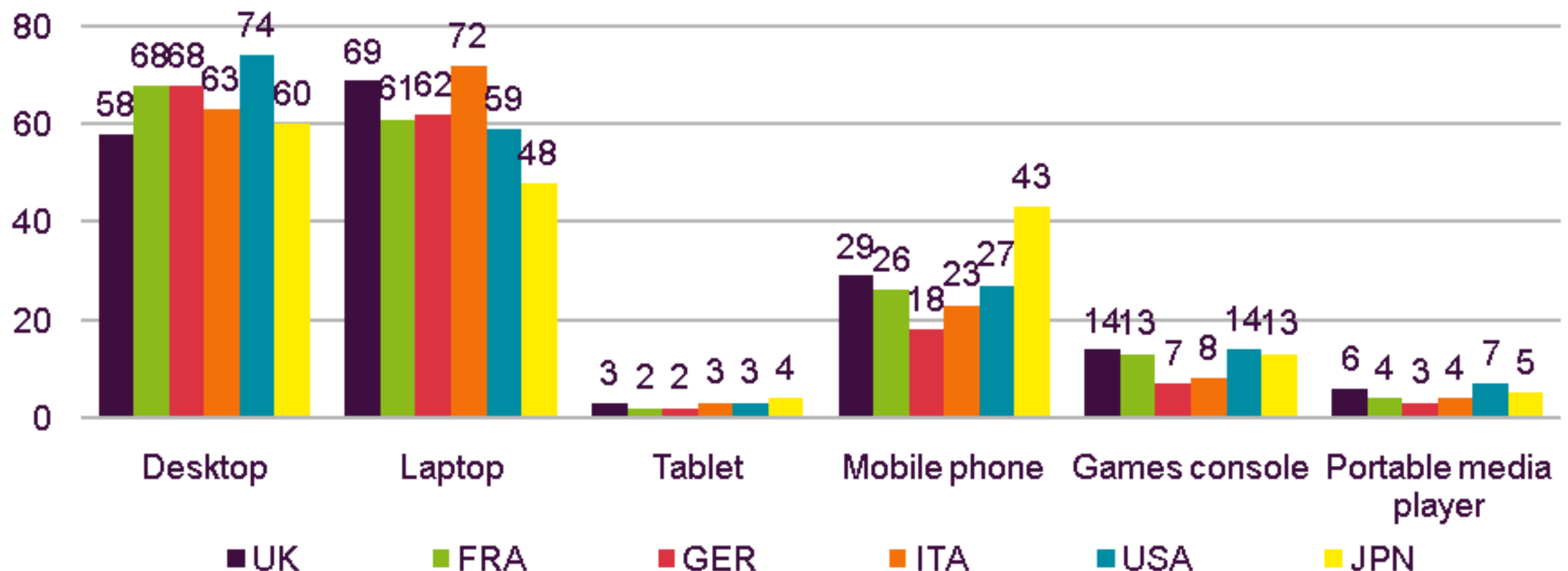
Source: The Nielsen Company, August 2010, home and work panel, applications included.

Note: Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.23

Devices used to access the internet

Respondents claiming to use device to access the internet (%)



Source: Ofcom research, October 2010.

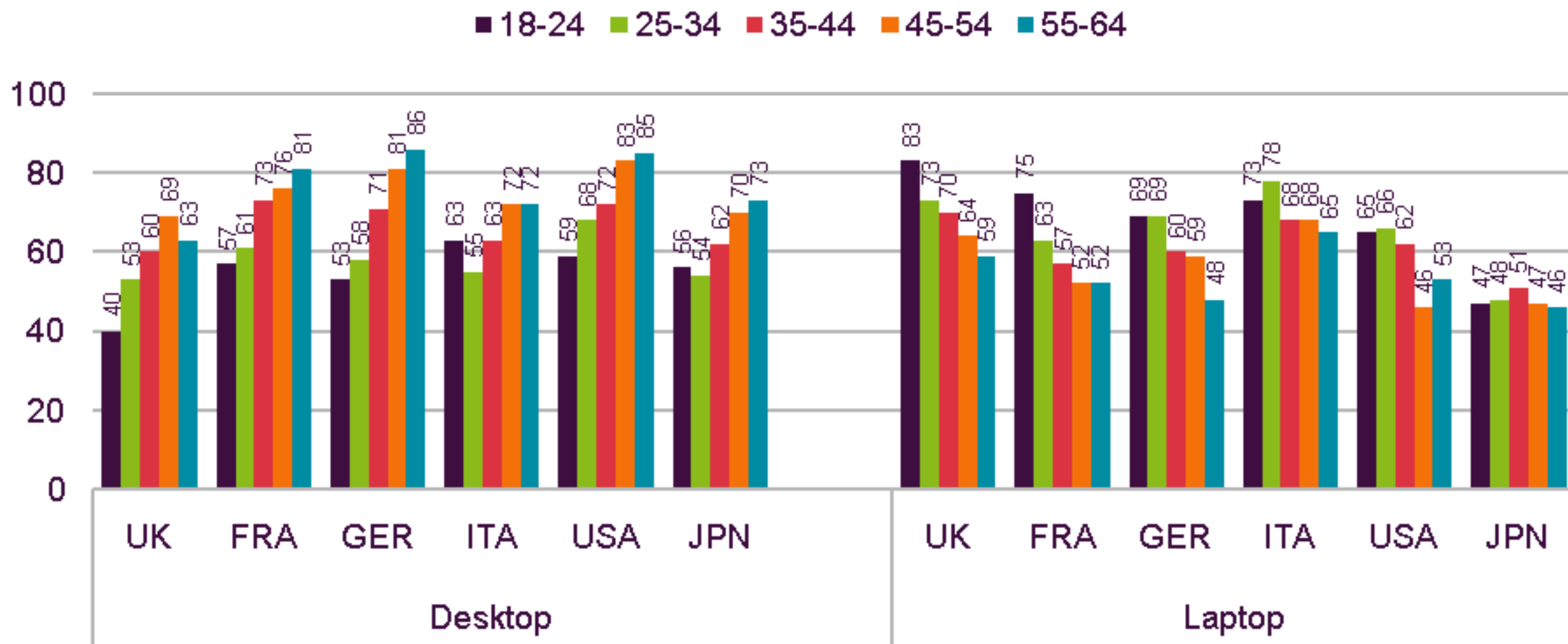
Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q8. Which of the following devices do you use to access the internet at home (e.g. visiting web sites, emailing, online gaming, downloading files)?

Figure 5.24

Devices used to access the internet, by age

Respondents claiming to use device to access the internet (%)



Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q8. Which of the following devices do you use to access the internet at home (e.g. visiting web sites, emailing, online gaming, downloading files)?

Figure 5.25

Top 10 website brands per country

	UK	FRA	GER	ITA	USA	JPN	ESP
1	Google -	Google -	Google -	Google -	Google -	Yahoo! -	Google -
2	MSN/WindowsLive/ Bing -	MSN/WindowsLive/ Bing -	eBay +1	Facebook (new)	Yahoo! -	Google -	MSN/WindowsLive/ Bing -
3	Facebook +4	Facebook (new)	Microsoft -1	MSN/WindowsLive/ Bing -1	Facebook (new)	FC2 +5	Facebook (new)
4	Yahoo! -	Microsoft -1	MSN/WindowsLive/ Bing +1	YouTube +4	MSN/WindowsLive/ Bing -1	Rakuten -1	YouTube +1
5	BBC -2	Orange -1	YouTube +5	Virgilio -1	YouTube +1	Microsoft +1	Microsoft -2
6	eBay -	YouTube (new)	Wikipedia -	Yahoo! -1	Microsoft -2	Wikipedia +3	Yahoo! -2
7	YouTube +1	Yahoo! -1	Amazon -	Microsoft -4	AOL Media Network -2	goo (new)	Blogger -1
8	Microsoft -3	Free -3	T-Online -	Libero -2	Apple +2	YouTube (new)	Wikipedia -
9	Amazon -	PagesJaunes -1	Facebook (new)	Wikipedia -	Ask Search Network (new)	"@nifty" (new)	Terra -2
10	Wikipedia (new)	Wikipedia (new)	RTL Network (new)	Blogger (new)	Wikipedia -1	Ameba (new)	Orange -1

Source: The Nielsen Company, August 2010.

Note: includes all internet applications. '+' or '-' denotes change in rank since 2008 ICMR publication.

Figure 5.26

Most searched terms on Google in the last 12 months

Country	1 ST	2 ND	3 RD	Largest increase
UK	facebook	bbc	youtube	4od
FRA	facebook	youtube	bon coin (classifieds)	facebook.fr
GER	facebook	youtube	ebay	Wm (World Cup)
ITA	facebook	youtube	Libero (portal)	megavideo
USA	facebook	youtube	yahoo	ipad
CAN	facebook	youtube	lyrics	world cup
JPN	yahoo	youtube	facebook	ipad
POL	nasza	Gry (games)	nasza klasa (our class)	nk.pl
ESP	facebook	youtube	Tuenti (social network)	facebook en español
NED	Hyves (social network)	online	youtube	youtube.nl
SWE	facebook	youtube	google	facebook.se
IRE	facebook	youtube	bebo	rte player
AUS	facebook	games	youtube	ipad
BRA	Jogos (games)	Orkut (social network)	youtube	facebook
RUS	Скачать (download)	Фото (photo)	В контакте (in contact)	naomi watts
IND	India	songs	facebook	facebook login
CHN	Qq (social network)	games	baidu	dnf1100

Source: Google Insights Search Tool, 27 Sept '10, 11:20GMT

Figure 5.27

Main reason for using the internet

	Ever			Weekly		
	1st	2nd	3rd	1st	2nd	3rd
UK	Accessing email (94%)	Shopping (81%)	Banking (71%)	Accessing email (89%)	Social Networking (56%)	Banking (55%)
FRA	Accessing email (94%)	Shopping (76%)	Instant Messaging (65%)	Accessing email (90%)	Instant Messaging (50%)	Social Networking (48%)
GER	Accessing email (93%)	Shopping (79%)	Banking (72%)	Accessing email (91%)	Banking (57%)	Social Networking (46%)
ITA	Accessing email (92%)	Shopping (68%)	Social Networking (66%)	Accessing email (87%)	Social Networking (57%)	Instant Messaging (39%)
USA	Accessing email (94%)	Shopping (74%)	Banking (68%)	Accessing email (90%)	Social Networking (57%)	Banking (53%)
JPN	Accessing email (90%)	Shopping (87%)	Banking (69%)	Accessing email (87%)	Watching video clips (32%)	Shopping (27%)

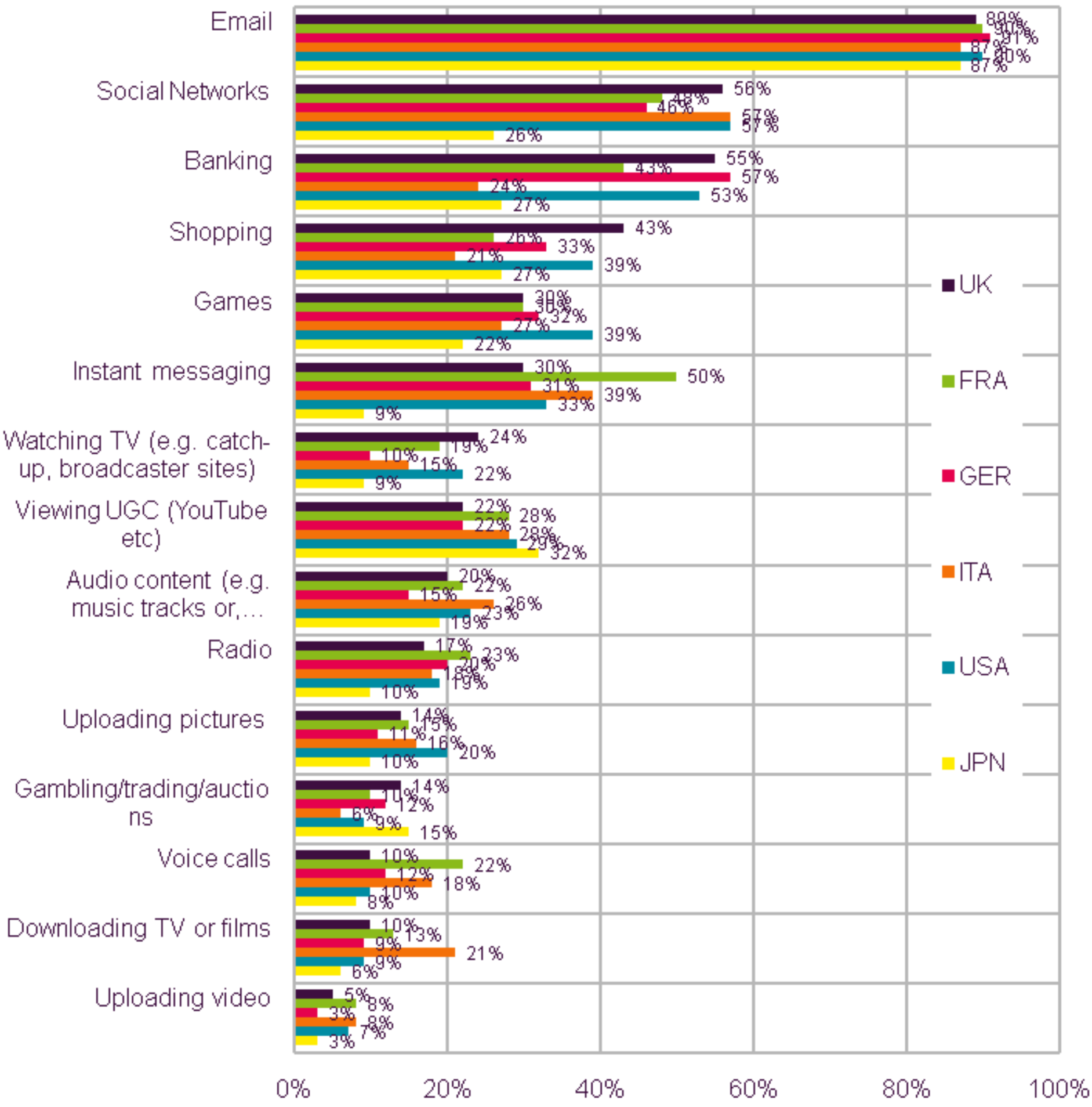
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q9. Which, if any, of the following activities do you use your home internet connection for?

Figure 5.28

Use of home internet connection



Source: Ofcom research, October 2010.

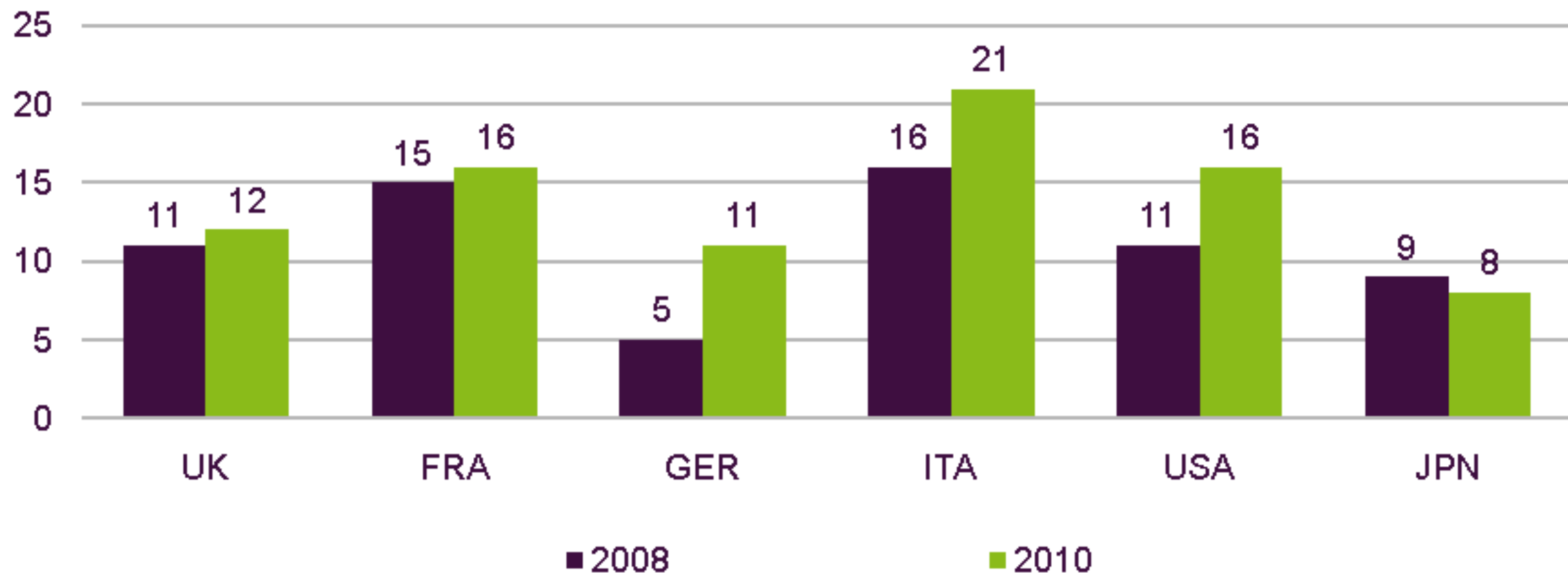
Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q: Which, if any, of the following activities do you use your mobile phone for at least once a week?

Figure 5.29

Respondents uploading video content via internet connection

Use of the internet to upload video content (%)



Source: Ofcom research, October 2010.

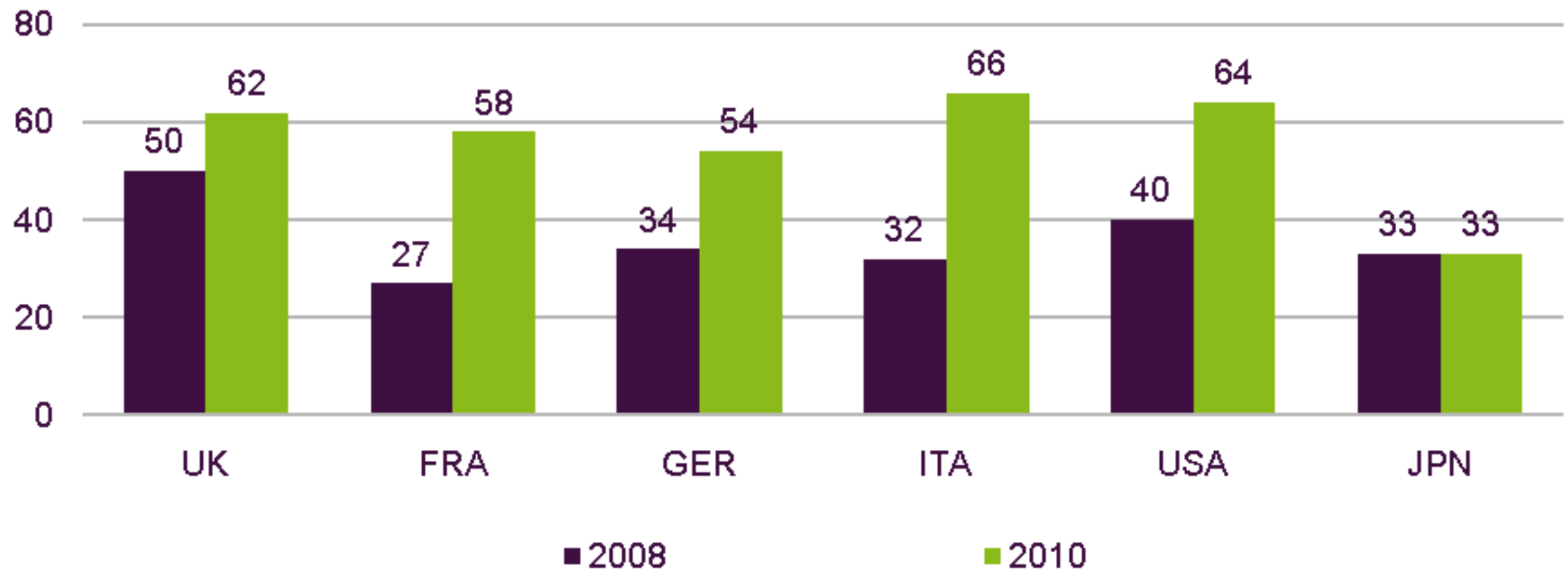
Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q9: Which, if any, of the following activities do you use your home internet connection for?

Figure 5.30

Use of the internet to visit social network sites

Use of the internet to visit social networking sites (%)



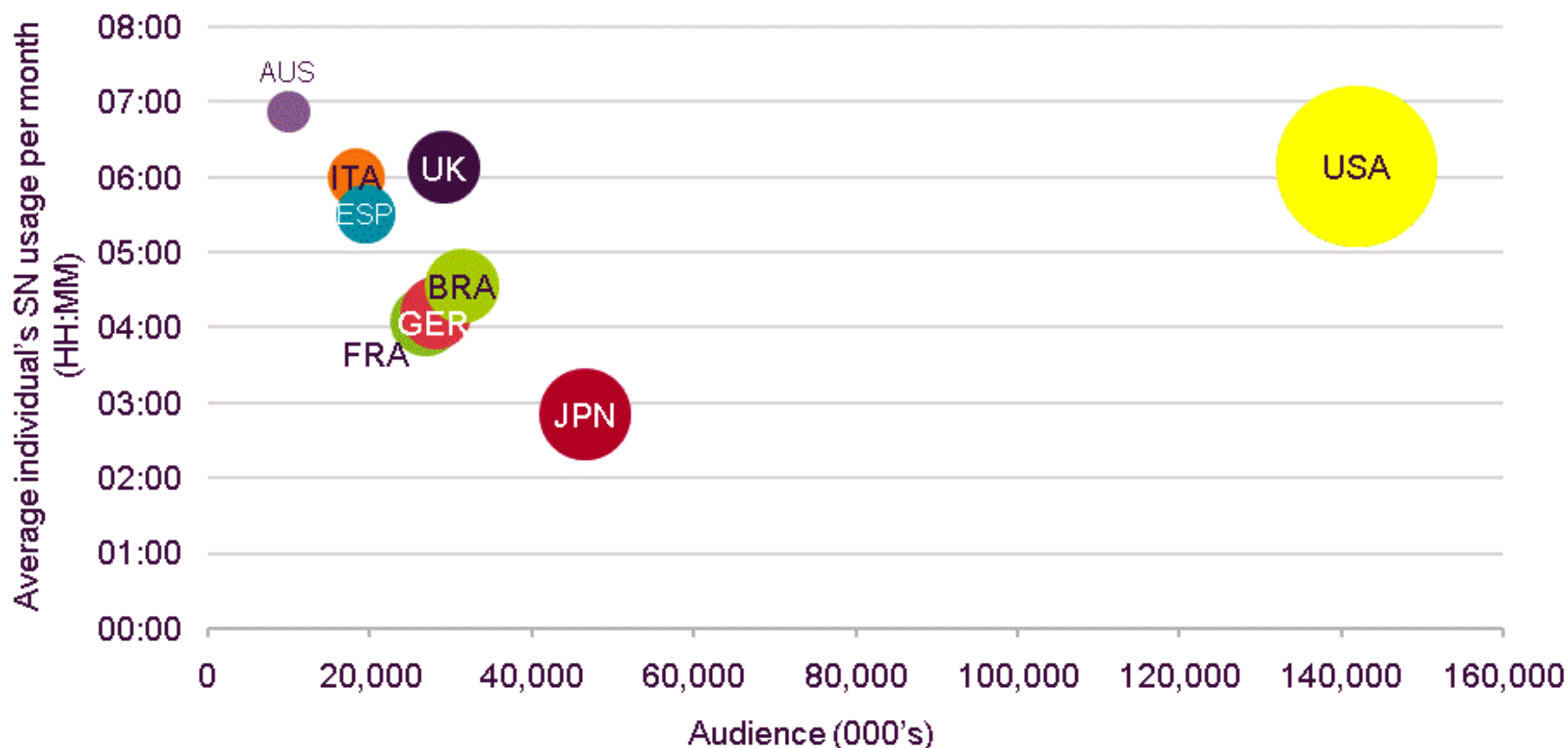
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q9: Which, if any, of the following activities do you use your home internet connection for?

Figure 5.31

Monthly unique audience visiting social network sites

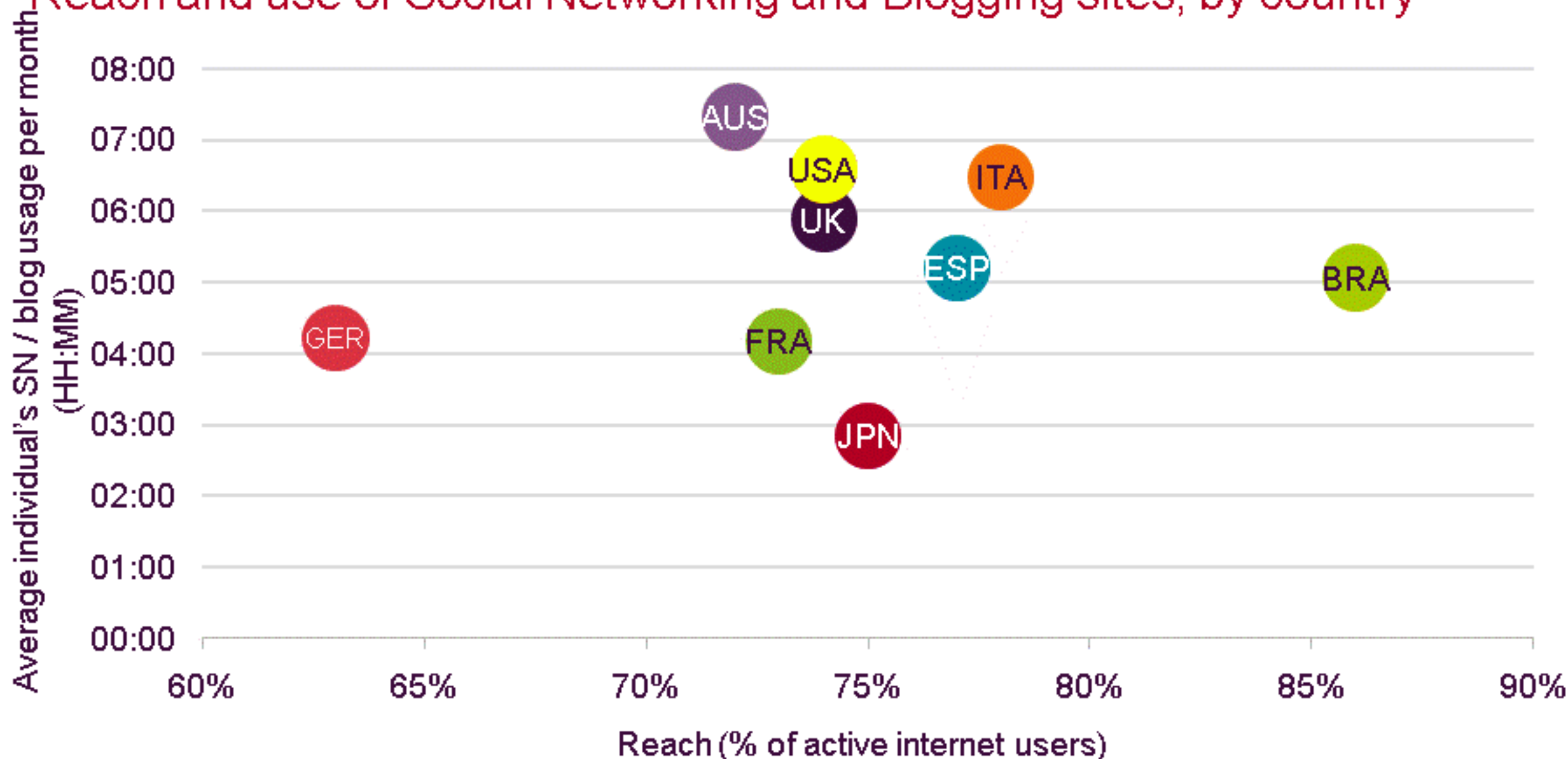


Source: The Nielsen Company, December 2009.

Note: Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.32

Reach and use of Social Networking and Blogging sites, by country



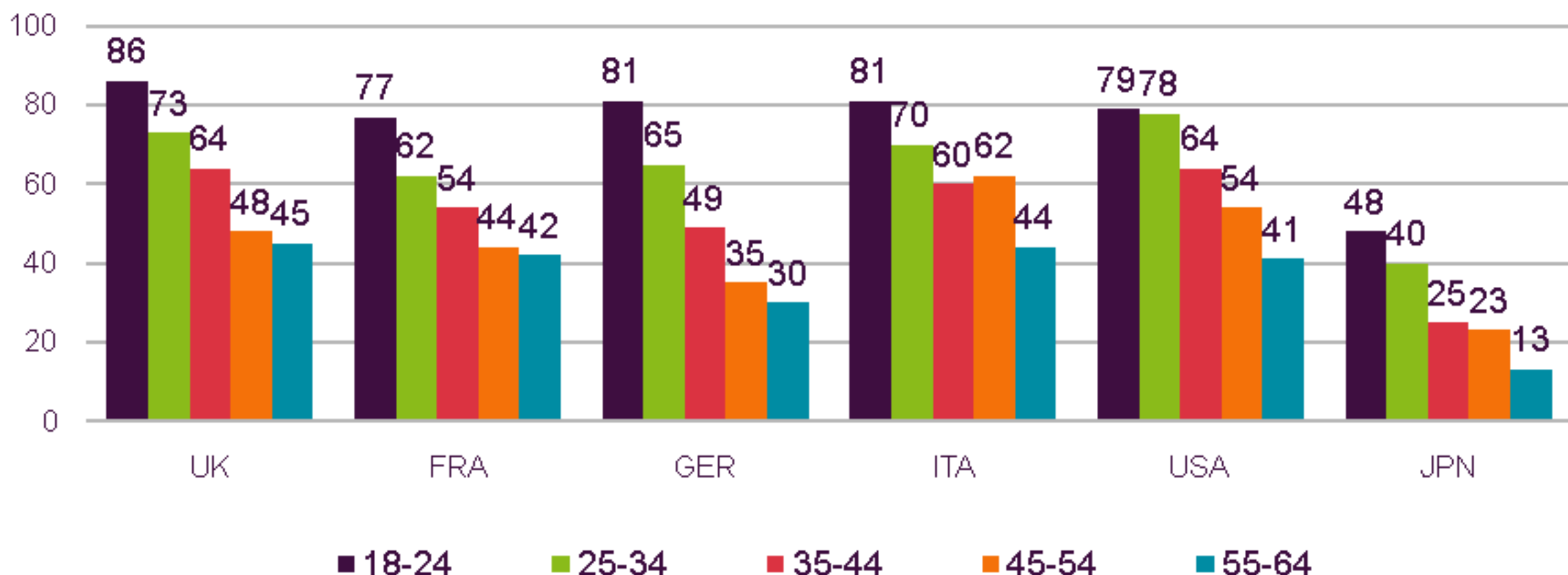
Source: The Nielsen Company, April 2010. Home and work data.

Note: Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.33

Use of the internet for social networking by age

Use of internet for social networking (%)



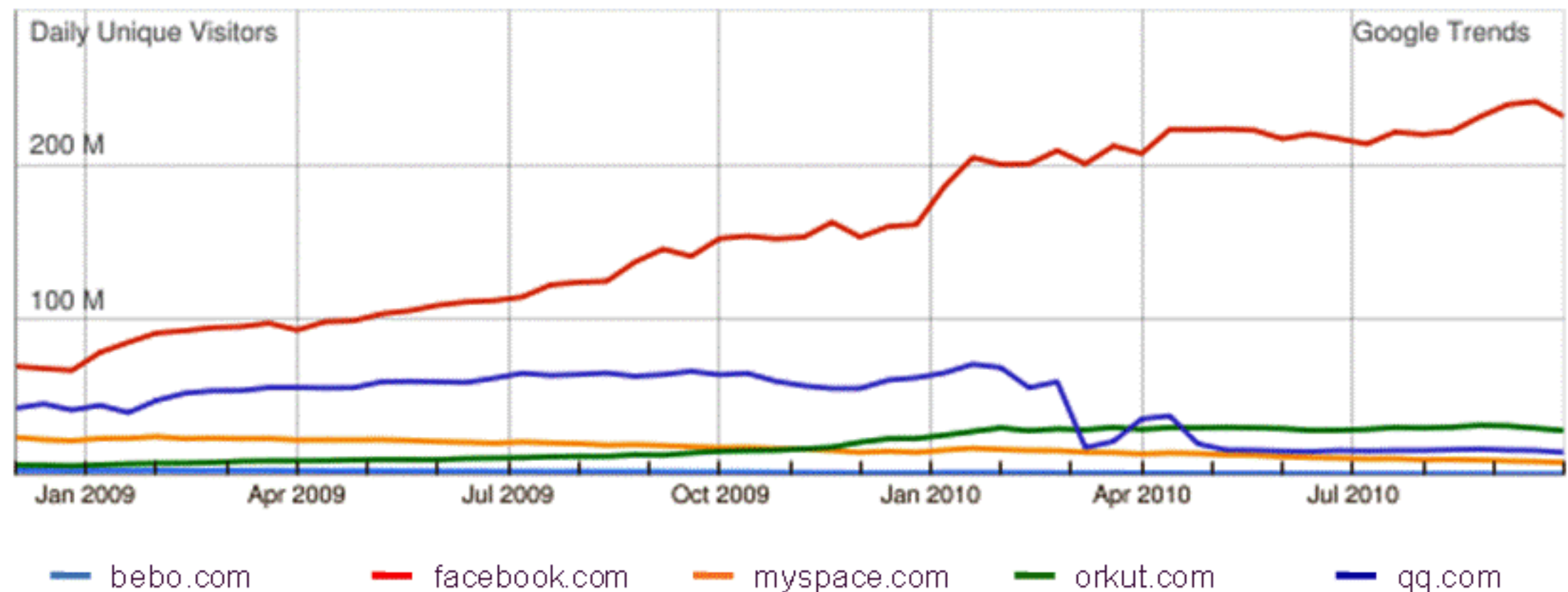
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q9: Which, if any, of the following activities do you use your home internet connection for?

Figure 5.34

Daily unique visitors to global social network sites, Jan 2009 to Oct 2010

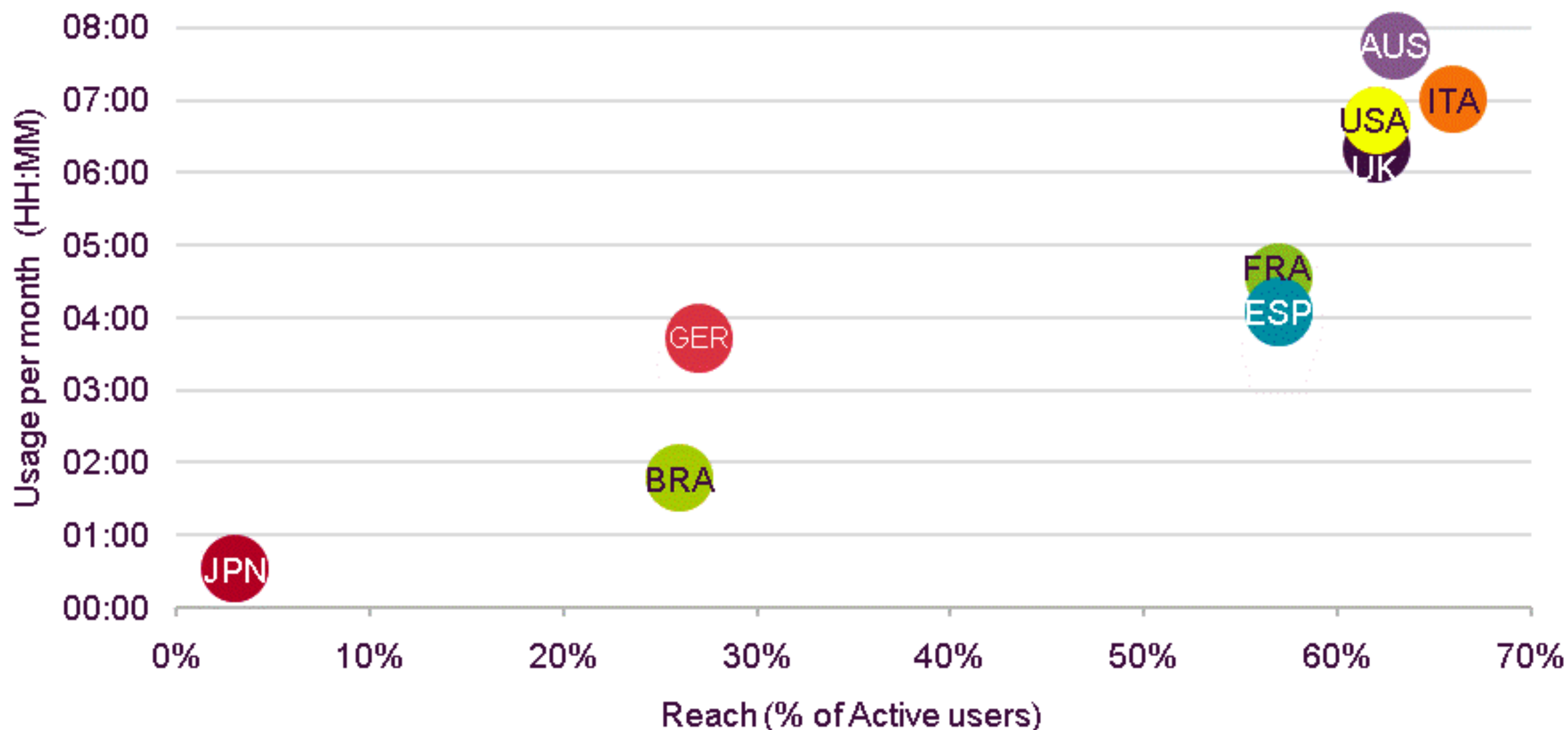


Source: <http://trends.google.com> checked 21st October 2010

Note: Qq.com is used almost exclusively in China.

Figure 5.35

Facebook reach and use, by country



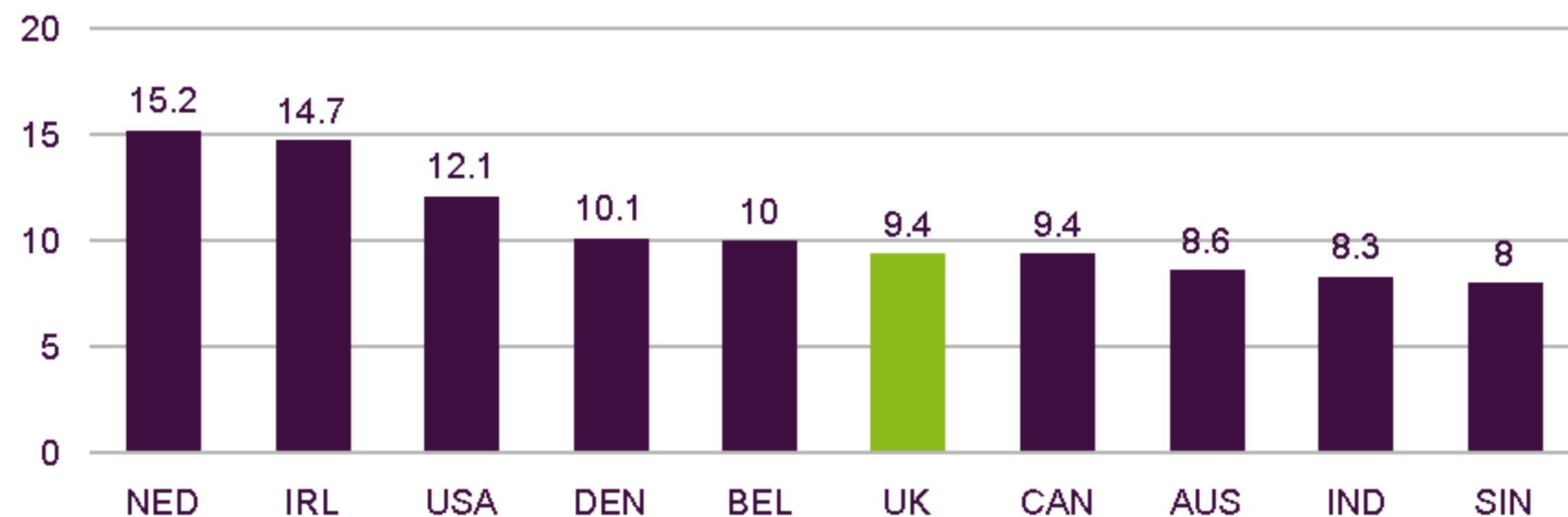
Source: The Nielsen Company, April 2010. Home and work data.

Note: Figures do not include mobile phone use. Nielsen is investigating a decline in its internet use data around duration metrics and the potential impact of this on Unique Audience metrics. Consequently, until these investigations are concluded, Nielsen internet data for 2010 is likely to represent a lower bound and should be treated as indicative only.

Figure 5.36

LinkedIn web penetration, top ten countries

Penetration (%)

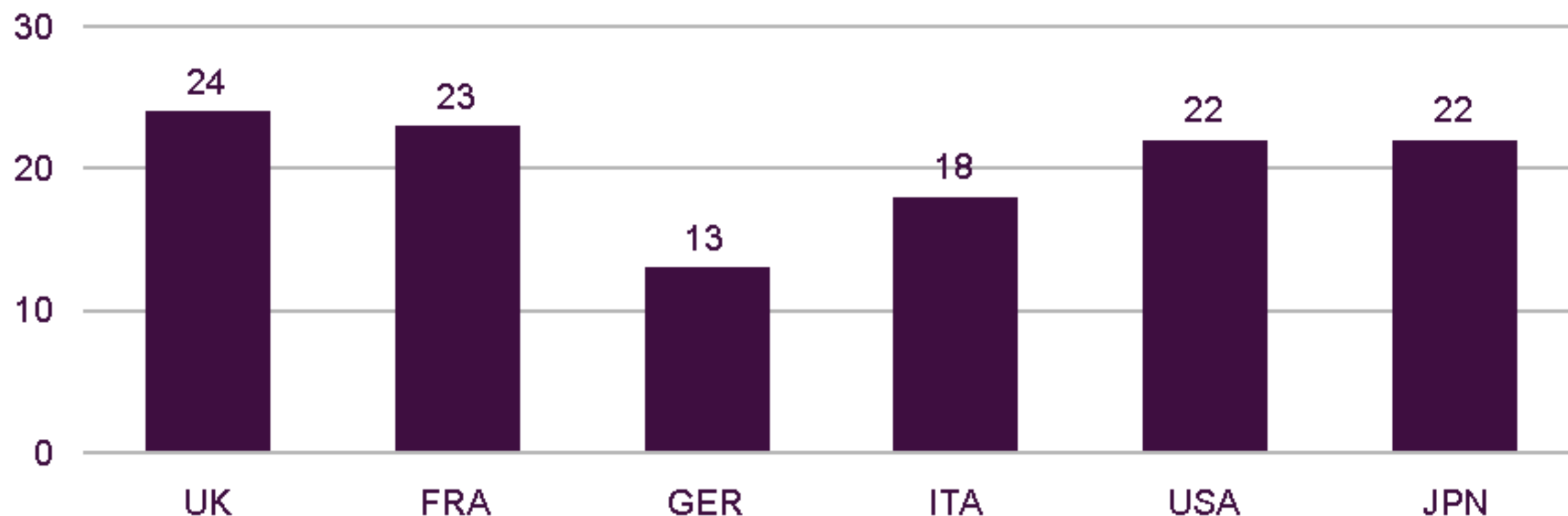


Source: comScore MediaMetrix, July 2010.

Figure 5.37

Use of mobile phones for social networking

Mobile owners accessing social networking sites (%)



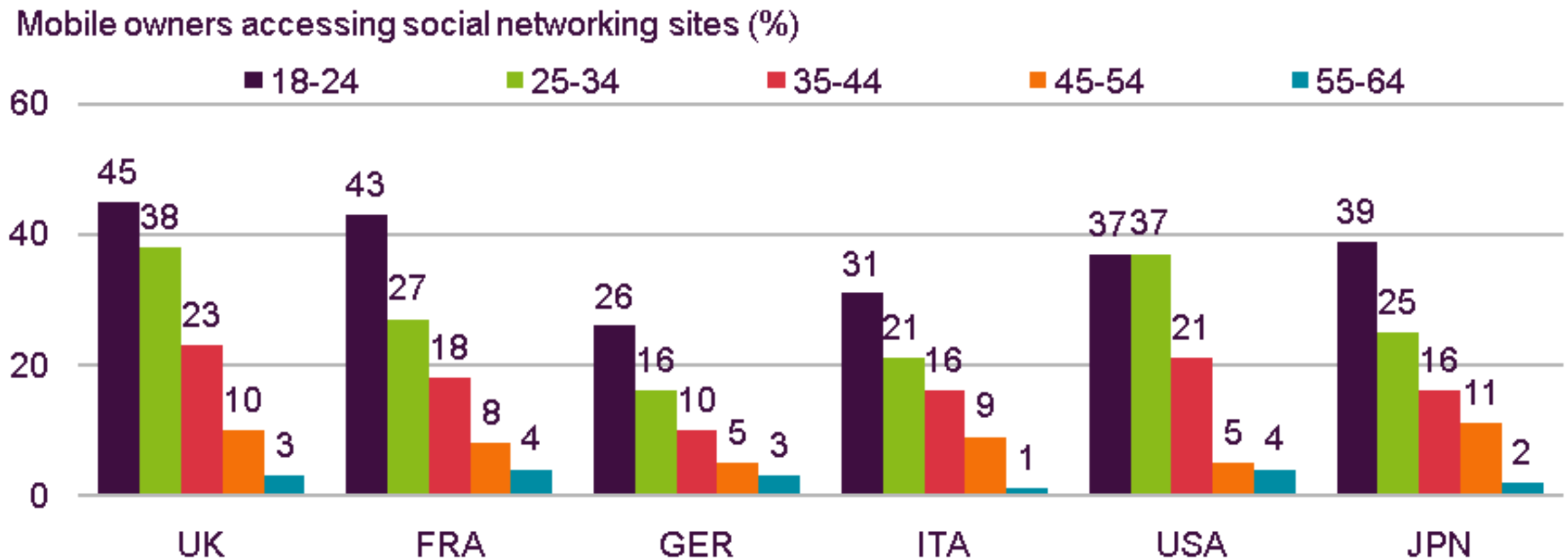
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q11. Which, if any, of the following activities do you use your mobile phone for?

Figure 5.38

Use of mobile phones for social networking, by age

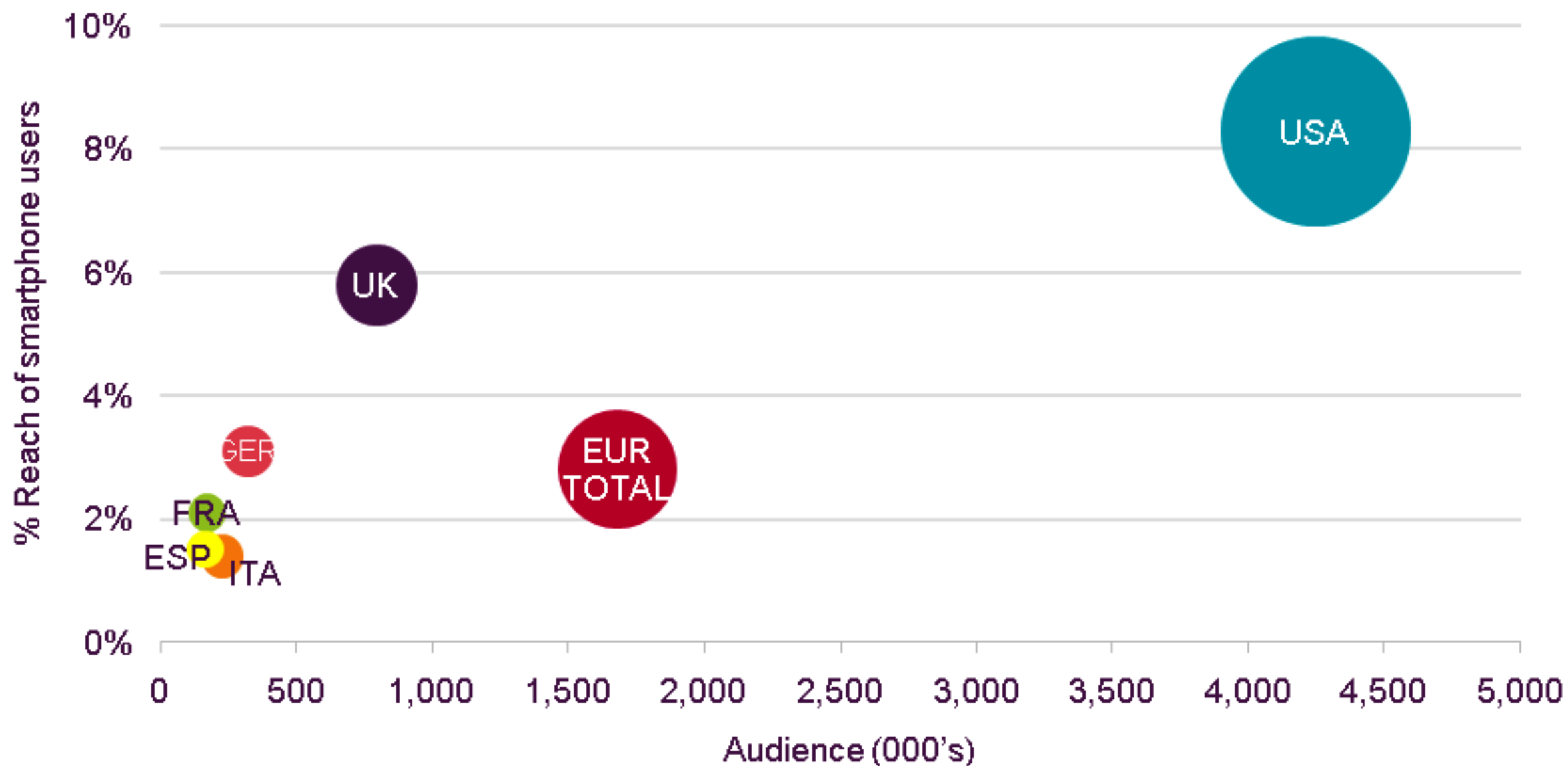


Source: Ofcom research, October 2010. Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q11. Which, if any, of the following activities do you use your mobile phone for?

Figure 5.39

Twitter penetration among smartphone users

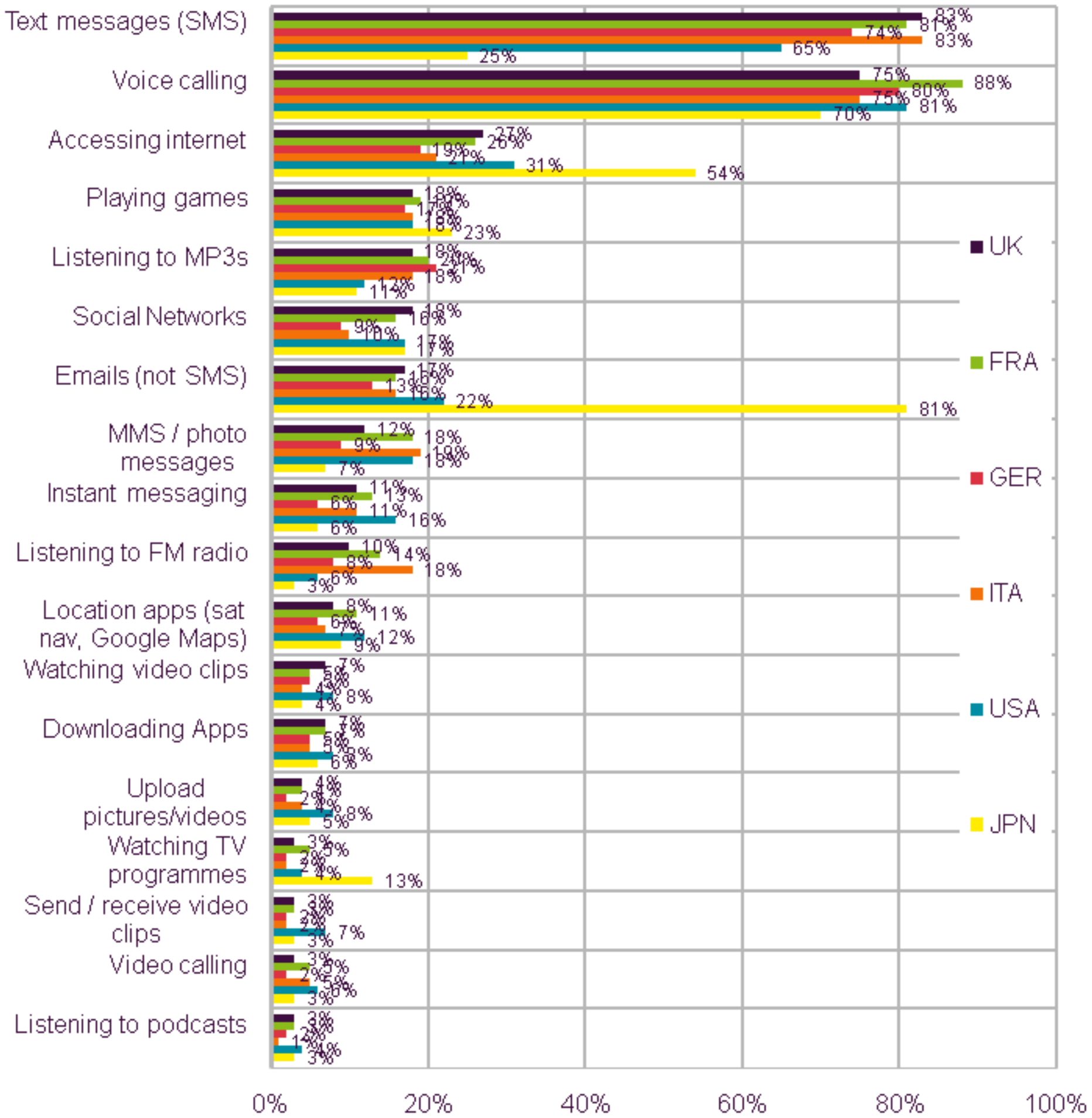


Source: comScore MobiLens. 3-Month Avg. Ending June 2010, Total Audience Age 13+.

Note: Includes only mobile browser access to Twitter and does not include other Twitter-based mobile applications.

Figure 5.40

Mobile phone uses by country



Source: Ofcom research, October 2010.

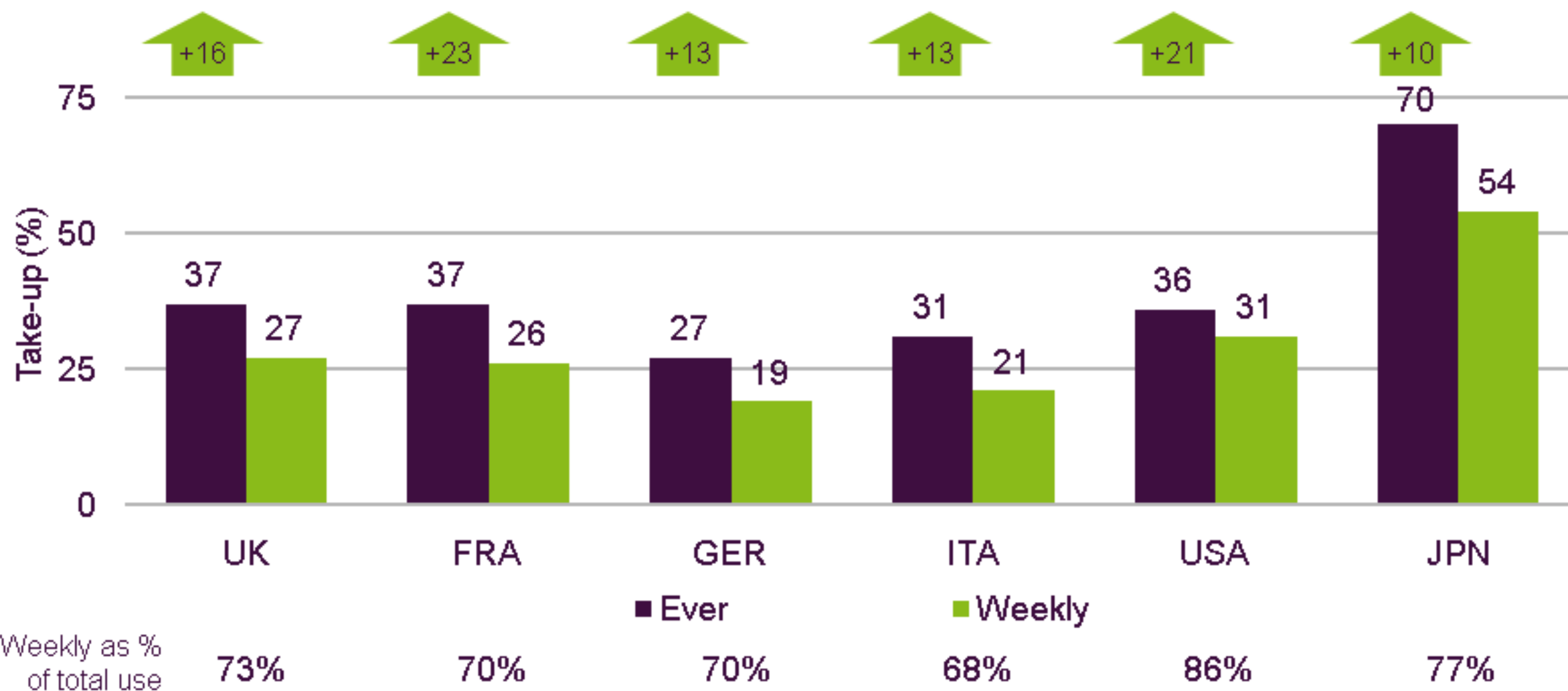
Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001). Take-up (%)

Q: Which, if any, of the following activities do you use your mobile phone for at least once a week?

Figure 5.41

Internet access via mobile phone

Arrows denote % point growth in internet access 'ever' since 2008



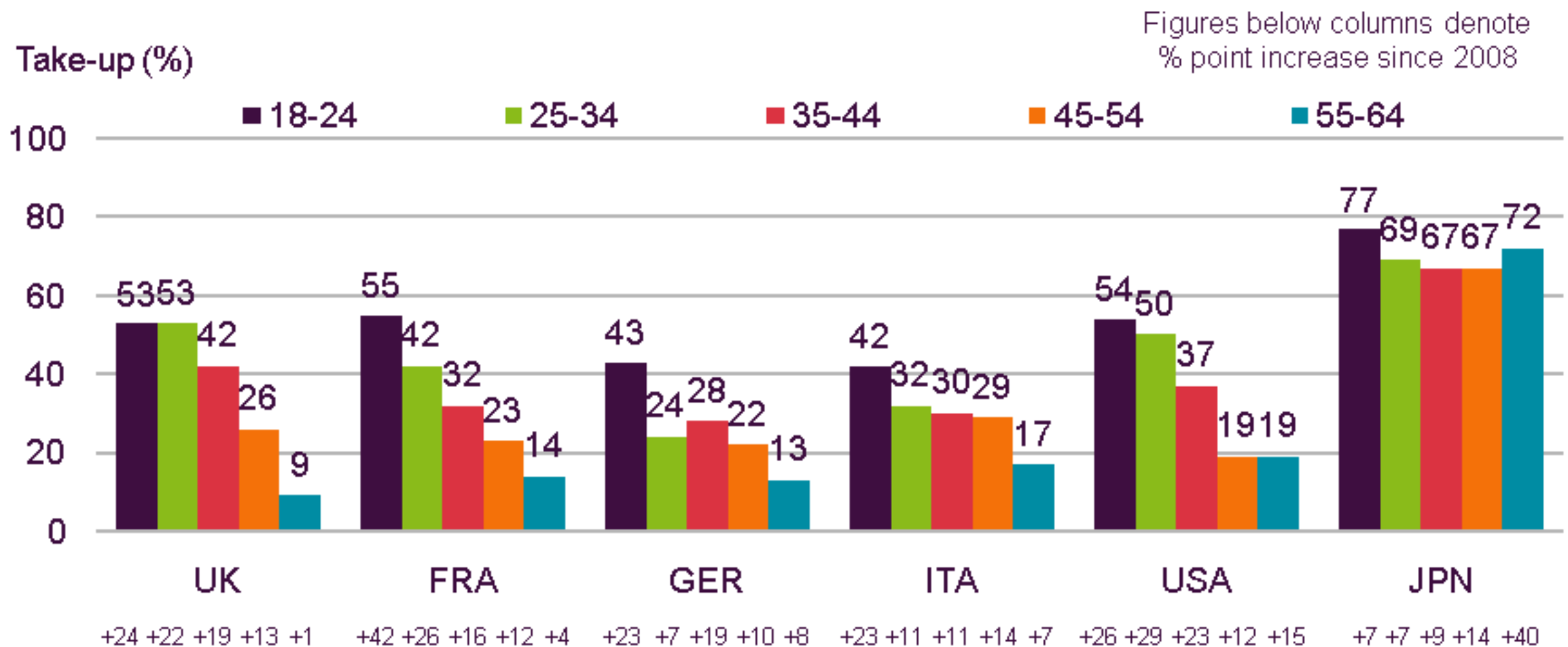
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q11. Which, if any, of the following activities do you use your mobile phone for?

Figure 5.42

Internet access via mobile phone among internet users, by age



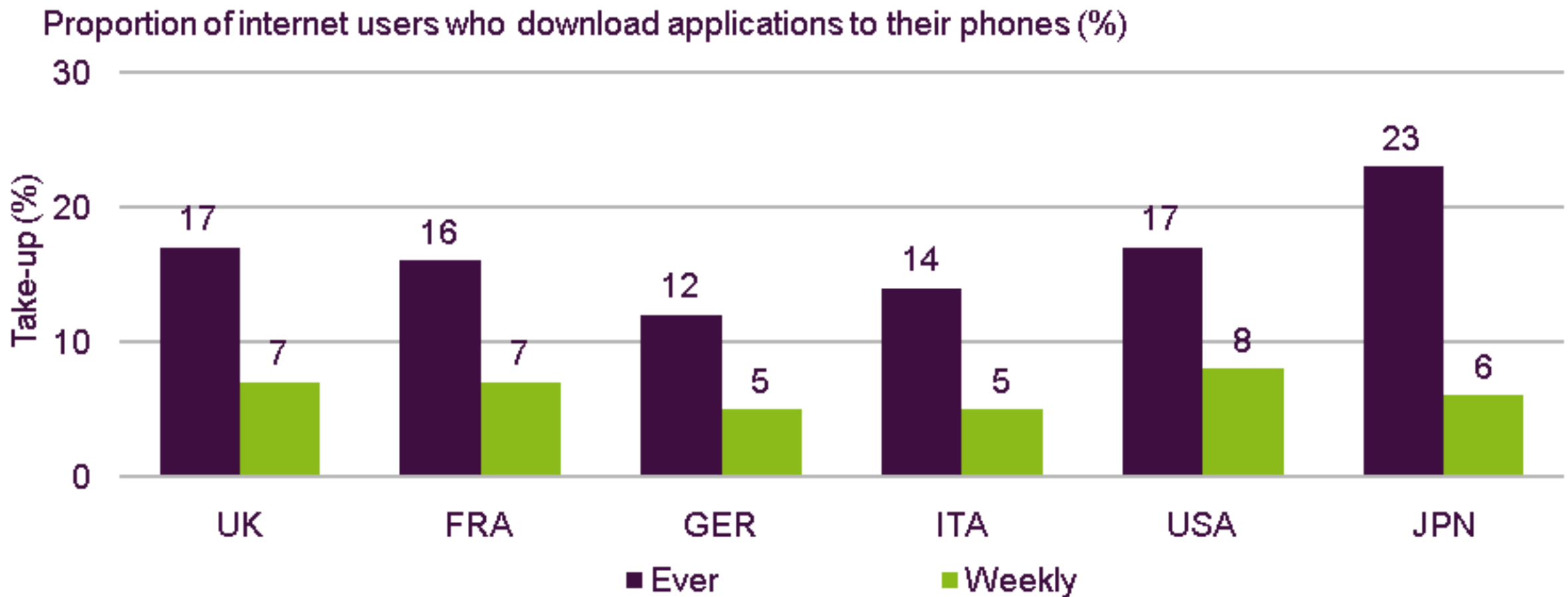
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Q11. Which, if any, of the following activities do you use your mobile phone for?

Figure 5.43

Internet users who have downloaded applications to their phones



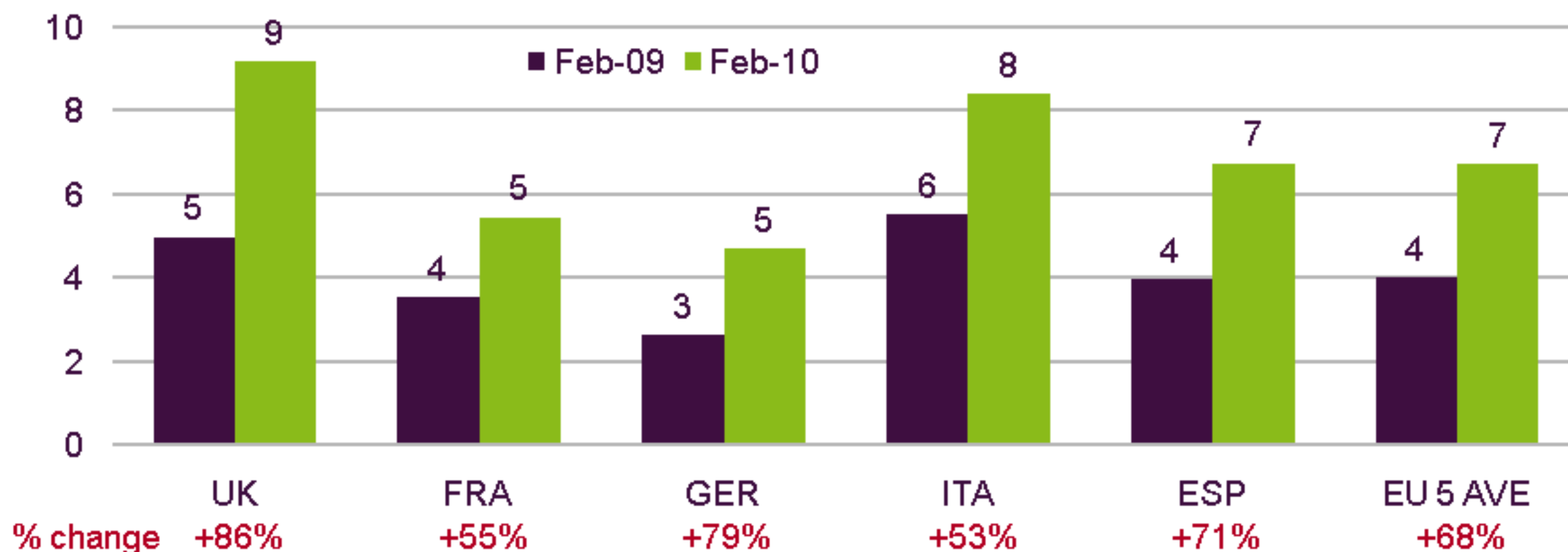
Source: Ofcom research, October 2010.

Base: All adults aged 18+ who use the internet (UK=1016, France=1017, Germany=1014, Italy=1002, USA=1017, Japan=1001).

Figure 5.44

Users of mobile map and direction services Feb 2010

Mobile map users per 100 population



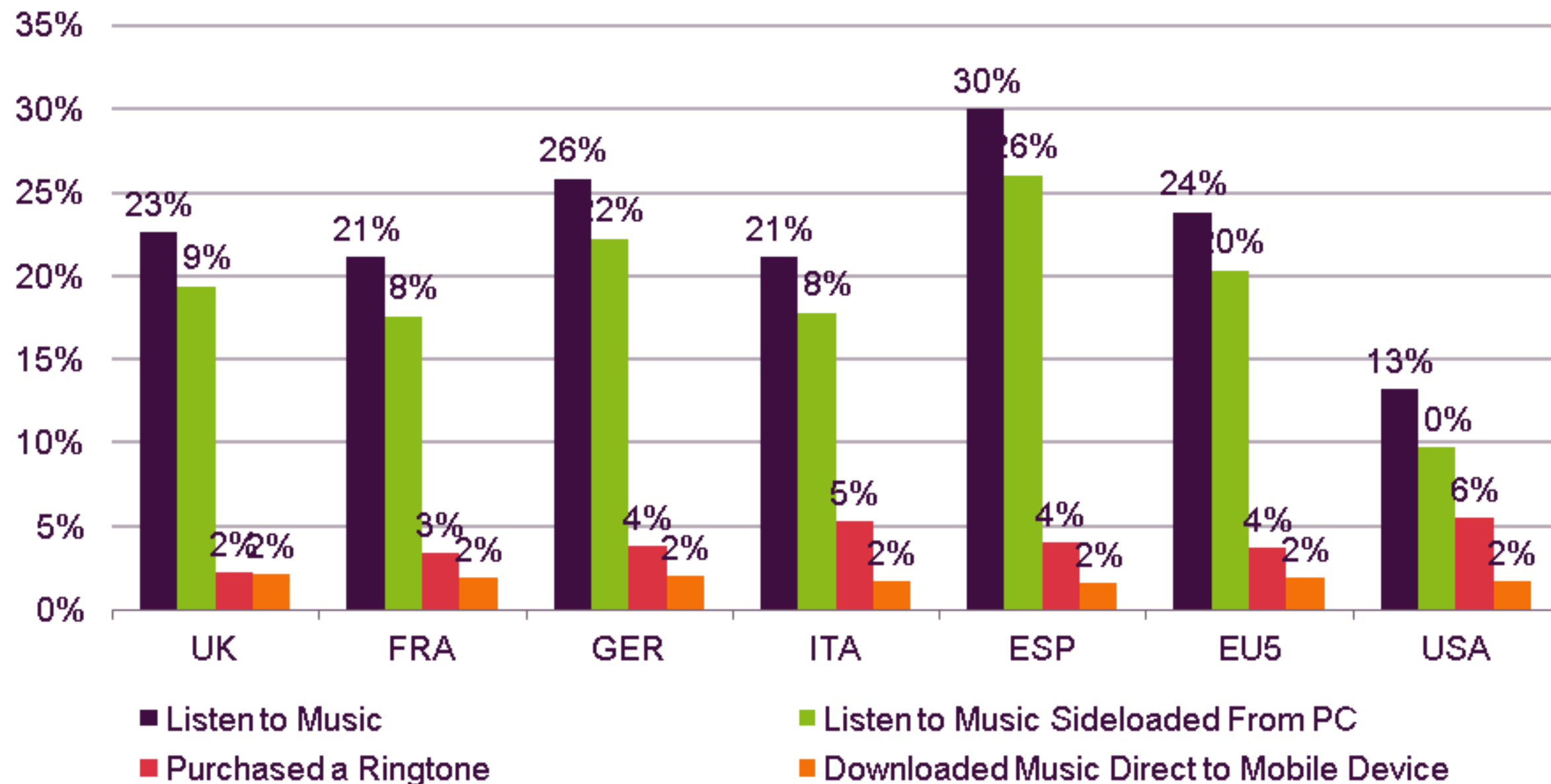
Source: comScore MobiLens / Ofcom calculations. Age 13+.

Note: Subscriber numbers based on 3 month average ending Feb 2010 vs. 3 month average ending Feb 2009. Population based on year end figures for 2008 and 2009. EU 5 = UK, FRA, GER, ITA, ESP.

Figure 5.45

Mobile Music Users, Q1 2010

Proportion of mobile users (%)



Source: comScore MobiLens. Age 13+.

Note: 3-month average ending March 2010.