International Communications Market Report 2013

5 Internet and web-based content

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5.1 Key market developments in internet and web-based content

5.1.1 Introduction

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)*	44.6	42.6	53.1	29.7	197.0	n/a	73.7	14.5	23.0	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Fixed broadband connections per 100 HH†	80	84	69	53	75	85	76	68	65	91	66	66	39	31	49	6	43
Mobile broadband connections per 100 population†	7	4	6	12	44	3	9	23	4	6	19	10	9	n/a	n/a	n/a	n/a
Internet access via a mobile phone(%)‡	57	46	47	63	44	n/a	58	55	69	n/a	n/a	n/a	n/a	n/a	n/a	n/a	86

Source: IDATE / Industry data / Ofcom / comScore
**comScore MMX, August 2013, home and work panel,*
† IDATE / Industry data / Ofcom, 2013.
‡Ofcom international research, September 2013.

The internet is a platform through which consumers can communicate and consume content, and the ability to access the internet is becoming a feature of more and more consumer devices. However, the extent to which internet users have adopted the internet for their communication and content needs, and which devices they use to do so, varies from country to country.

In this chapter we consider the differences between our comparator countries in take-up of the internet, use of internet-enabled devices, and consumption of web-based content. In section 5.2 we examine how people connect to the internet, which devices people use to access the internet, the respective size of countries' online audiences, how long people spend online, and how adoption of the internet varies by demographic. In section 5.3 we consider what internet users do once they are online, what websites they visit, and how this behaviour varies by demographic and by device.

For the remainder of this section we consider the internet advertising markets of our comparator nations and the rise of the mobile internet. Advertising plays a significant role in online markets, in many cases acting as the sole source of revenue for content creators and websites. We consider the size of internet advertising in relation to other advertising markets, the type of advertising, the level of spend per head across wired and mobile devices, and the recall and interaction with mobile advertisements. In the UK, half of the growth in internet advertising is being driven by mobile advertising; therefore in our second key market development we take a closer look at the mobile internet. We consider the take-up of the mobile internet, who mobile internet users are, the devices they use and what they use them for.

Key findings

In summary, the key findings of this section of the chapter are:

- **More than a third of all advertising spend in the UK is online.** The UK remained the country where the greatest share of all advertising spend was on the internet, with 36% of advertising being attributed to the sector in 2012.

- **The UK had the greatest spend per head on mobile advertising,** rising by almost £5 per person to £8.04 in 2012. Japan had the second highest spend, at £7.50, while the US had the second highest absolute growth of £3.52, and the third highest spend at £6.74 per head.

- **Seven in ten mobile users in the UK access the internet on their handset.** Three in four (75%) mobile users in Spain used their handset to access the internet in August 2013, the highest take-up of the mobile internet among the comparator countries analysed. The UK had the second highest take-up, with just over 71% of mobile users using the internet on their device.

- **Smartphone take-up was the highest in the UK and Spain**. Seventy-five per cent of mobile users owned a smartphone in Spain in August 2013. The UK had the second highest take-up, with seven in ten mobile users (71%) owning a smartphone, followed by the US (61%), and France, Germany and Italy (60%).

- **Android has at least a 50% smartphone OS market share in seven of our comparator countries.** Apple's iOS was the second most popular operating system across most countries, with the exception of Italy. Symbian's market share fell by half across UK, France, Germany, Italy and Spain, while the Blackberry OS also declined across all the comparator countries.

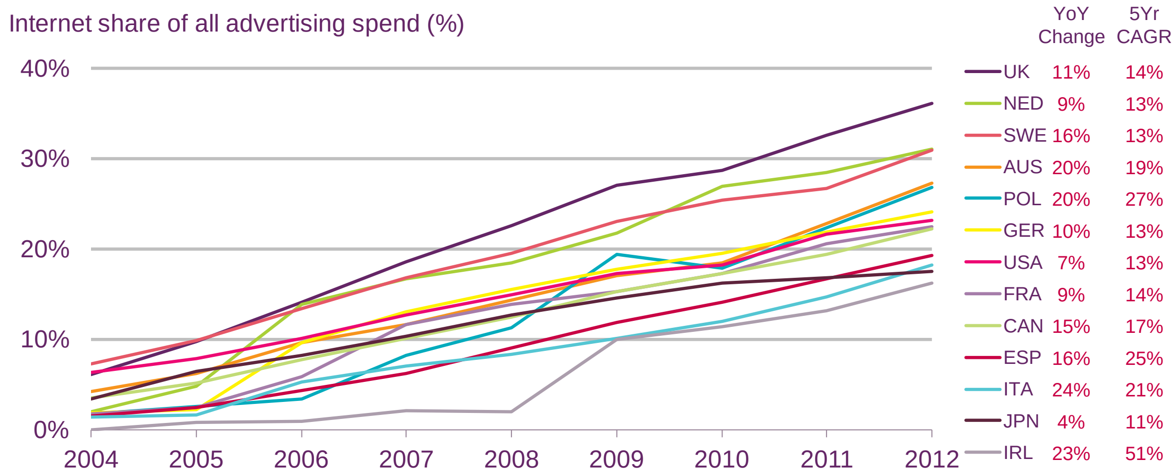
5.1.2 Internet advertising

More than a third of all advertising spend in the UK is online

The UK remained the country where the greatest share of all advertising spend was on the internet, with more than a third (36%) of advertising being attributed to the sector in 2012. The Netherlands and Sweden had the next largest shares (31%) followed by Australia and Poland (27%).

Ireland remained the country with the smallest share of advertising spend (16%) despite having the second highest year-on-year growth (23%). The internet's share of advertising grew fastest in Italy (24%) to overtake share in Japan which grew just 4% to 17%, slipping to the second smallest share of advertising spend.

Figure 5.2 Internet share of total advertising expenditure



Source: Warc data (www.warc.com)
Please refer to notes on adspend data for further detail and source information.
http://www.warc.com/NotesOnAdspendData

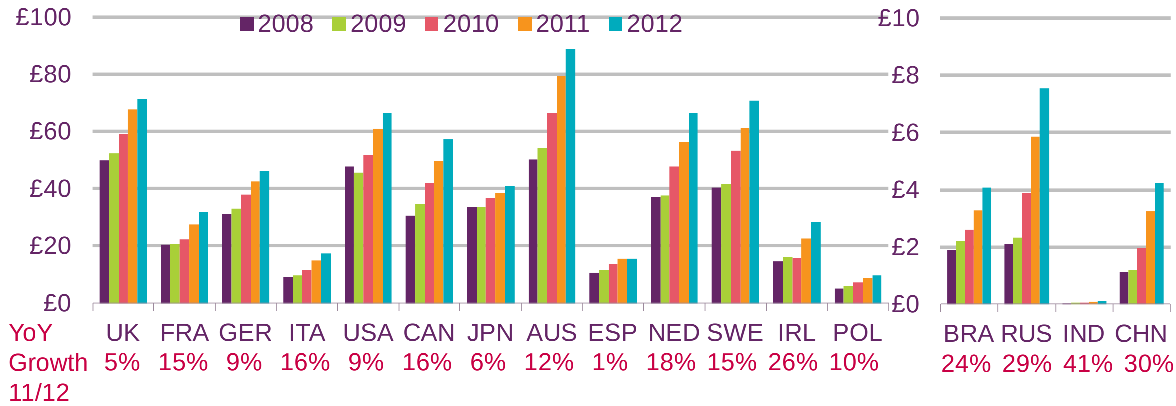
Spend on laptop and desktop internet advertising is greatest in Australia, at almost £90 per head

Internet advertising consists of spending by advertisers on paid search, banner/display, classified, video and other online formats such as email and sponsorships. Wired internet advertising consists of spend on adverts viewed on fixed or 'wired' devices, predominantly through web browsers on laptop and desktop computers. Although these devices could access the internet through a mobile rather than a fixed broadband connection, wired advertising remains distinct from mobile advertising, which is advertising viewed on a mobile handset.

Australia's spend per head on wired internet advertising in 2012 was £89, the greatest among our comparator countries. The UK had the second highest spend, with just over £71, while Sweden was third highest with just under £71. Among those countries with the highest spend per head, there was double-digit growth in Australia, Netherlands and Sweden, while in the UK and the US spend per head grew by 5% and 9% respectively. This slower growth may be due to substitution in the UK and US markets for mobile advertising, as shown by the strong growth in this sector (Figure 5.5).

In Poland and among the BRIC countries, wired internet advertising revenues stood at under £10 per head. Furthermore, between the BRIC countries there were varying degrees of spend per head, from £7.56 in Russia to just £0.11 in India.

Figure 5.3 Wired internet advertising expenditure per head: 2008-12



Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017 www.pwc.com/outlook; US Census Bureau (end of year estimates from mid-year values)

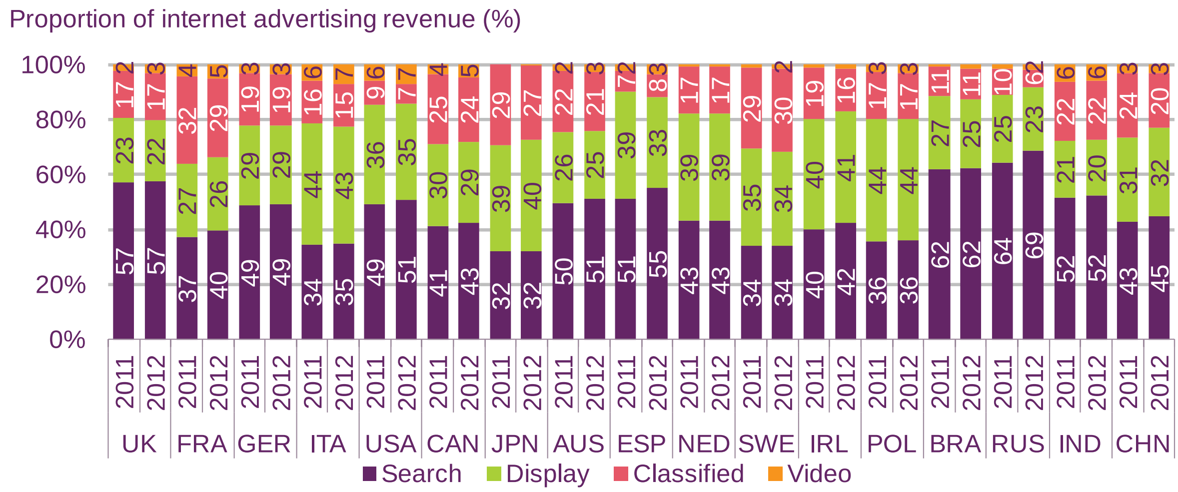
Search and video advertising revenue share grows or remains stable across all comparator countries

The share of internet advertising revenue between categories of advertising varies considerably across our comparator countries. The respective strengths of internet classified, display, search and video advertising are likely to be the result of a number of country-specific factors including broadband penetration, broadband speeds, and the strength of other media competing for advertising spend.

Among our comparator countries the shares of search and video advertising have either grown slightly or remained stable between 2011 and 2012, while the shares of display and classified advertising have been less consistent. The largest shifts have been in Spain, where the share of display advertising fell six percentage points to the benefit of all other categories; in France, where search advertising gained three percentage points at the expense of classified; in Russia, where search advertising grew its share by four percentage points; and in China, where classified fell four percentage points to the equal benefit of search and display. In the UK, search (57%) and classified (17%) shares remained unchanged while video (3%) advertising grew one percentage point, as display (22%) fell by the same measure.

A very small, but growing, proportion of internet advertising revenue was from video display adverts. Online video display advertising can take one of two forms. The first is similar to display advertising on websites, but in the form of an audio-visual advert rather than a static image or series of animated images, and like banner advertising, can sit in the page alongside other content. The second is similar to traditional spot television advertising, where adverts are shown either before, after, or mid-way through an online video and the advert is embedded within the video player. In 2011, the proportion of internet advertising revenue represented by internet video advertising was highest in the US and Italy (7%), followed by India (6%), and then Canada and France (5%).

Figure 5.4 Wired internet advertising expenditure, by category: 2011-12



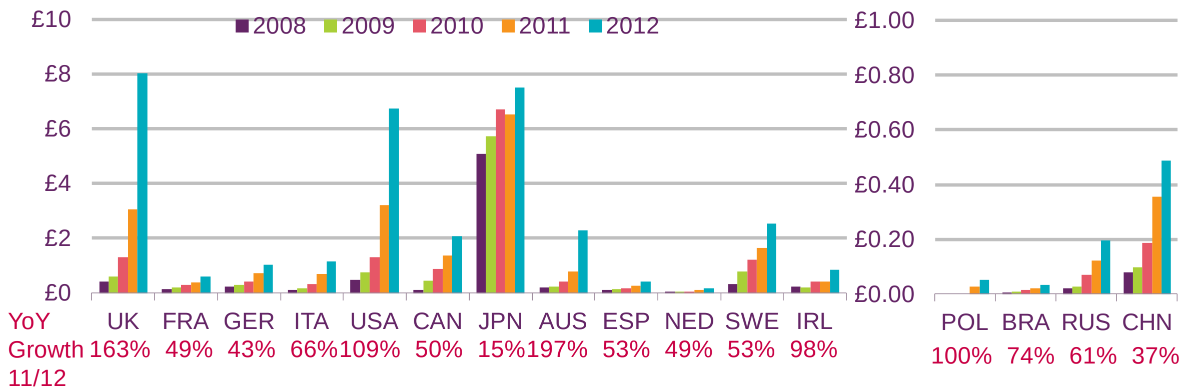
Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017
www.pwc.com/outlook

The UK had the greatest spend per head on mobile advertising in 2012

Mobile advertising includes all advertising delivered direct to the mobile device, and includes search and display advertising as well as SMS/MMS advertising formats. Mobile display advertising can also be delivered to the device's browser or to a mobile app.

In the UK, mobile advertising spend rose by almost £5 per person to £8.04 in 2012. This is the first year on record that Japan has not had the greatest spend per head; it had the second highest spend at £7.50. The US had the second highest absolute growth of £3.52, and the third highest spend at £6.74 per head. Australia had the fastest growth, 197%, almost tripling spend to £2.30 per head. The strong performance of mobile advertising in the UK, the US and Australia probably reflects the high take-up of smartphones and the mobile internet (see section 5.2.5 Internet-enabled devices), which together represent a more compelling advertising platform than previous mobile advertising formats.

Figure 5.5 Mobile advertising expenditure per head: 2008-12



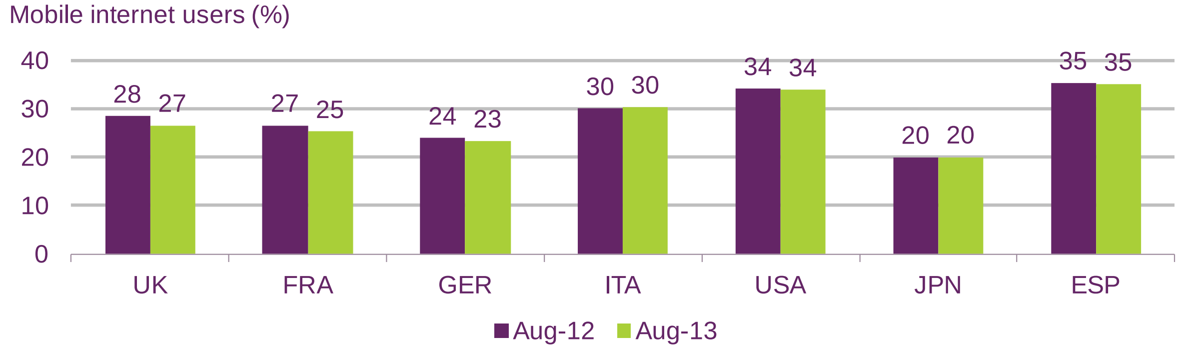
Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017 www.pwc.com/outlook; US Census Bureau (end of year estimates from mid-year values)

Despite growing revenues, consumer recollection of mobile advertising remains static

Mobile internet users in Spain were the most likely (at 35%) to recall having seen advertising in their mobile browser or application in the past month, followed by users in the US (34%)

and in Italy (30%). Despite the growth of advertising spend, recall of mobile advertising did not change significantly between August 2012 and August 2013 among the comparator nations (Figure 5.6). In the UK recall fell marginally from 28% to 27% of mobile internet users. Therefore, the growing spend on mobile advertising is likely to reflect the growing number of mobile internet users rather than increased exposure to advertising for each mobile user (see section 5.1.3).

Figure 5.6 Recall of mobile advertising in a mobile browser or application in the past month: August 2012 and August 2013

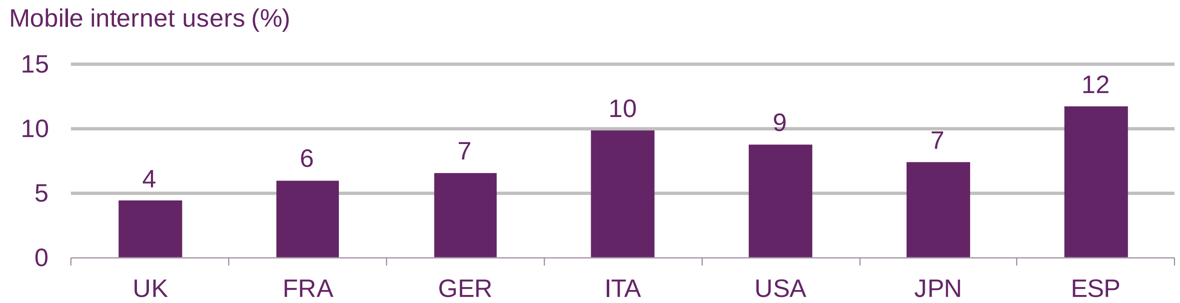


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

Mobile internet users in the UK are the least likely to claim to have tapped an advert in the last month

Mobile internet users in Spain were the most likely (12%) to claim to have tapped on an advert in a mobile browser or application in the past month, while users in the UK were the least likely (4%). While this might seem contradictory in the context of the high levels of mobile internet advertising spend (Figure 5.5), not all mobile internet advertising is intended to drive 'clicks', or in this case 'taps'. Instead, advertisers may wish to maximise the number of times an advert is viewed by consumers, also known as *impressions*. Alternatively, the lower proportion of mobile internet users claiming to have tapped an advert might reflect the fact that the majority of mobile advertising revenues in the UK were from mobile search advertising[56]. Consumers might not associate sponsored search results as adverts in the same way as display advertising, which could lower the proportion of those claimed to have tapped an advert.

Figure 5.7 Tapped on an advert in a mobile browser or application in the past month



Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+

[56] 69% search, 29% display. Source: *UK Communication Market Report*, Ofcom, August 2013.

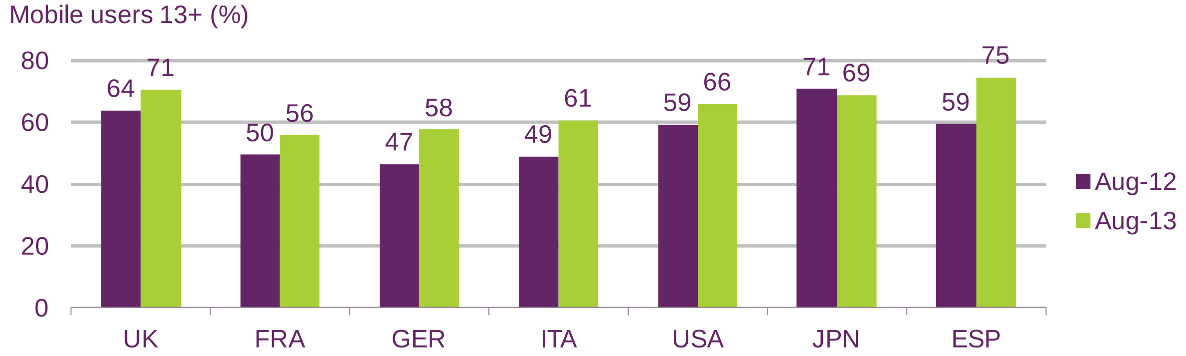
5.1.3 The mobile internet

Seven in ten mobile users in the UK access the internet on their handset

Three in four (75%) mobile users in Spain used their handset to access the internet[57] in August 2013, the highest take-up of the mobile internet among the comparator countries in Figure 5.8. The UK had the second highest take-up, with just over seven in ten (71%) mobile users using the internet on their device.

Spain was also the country with the greatest growth in mobile internet take-up, up 16 percentage points from August 2012, while the UK grew seven percentage points in the same period. Japan was the only comparator nation in Figure 5.8 to experience a decline in take-up of the mobile internet, down two percentage points (69%), but still had the third highest take-up overall, ahead of the US, Italy, Germany and France.

Figure 5.8 Mobile internet take-up



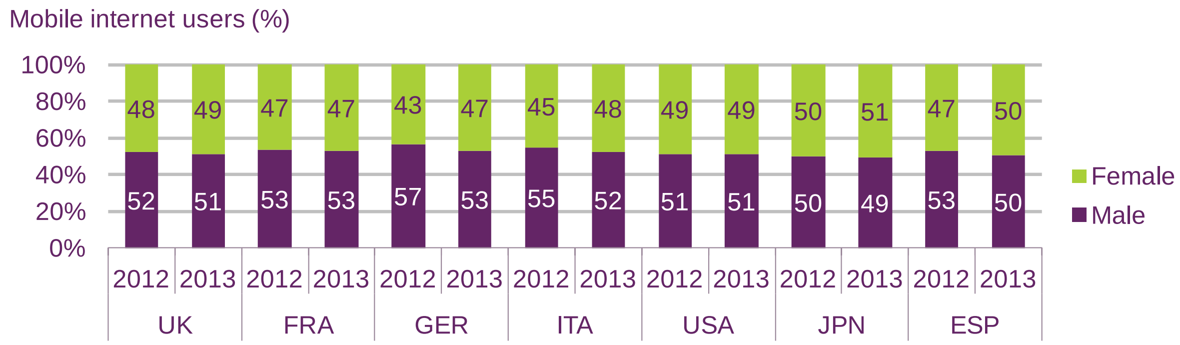
Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile users aged 13+

In Europe and the US there is a trend towards a more even gender split of mobile internet users

The strongest skew in the profile of mobile internet users was in France and Germany, where 53% of users were male and 47% female. Spain had an equal proportion of male and female mobile internet users, while in Japan mobile internet users were slightly more likely to be female (51%) than male. With the exception of Japan, the trend among the comparator countries in Figure 5.9 has been away from a greater proportion of male mobile internet users towards a more even gender split.

[57] Mobile internet access is defined as using the mobile browser, or using a downloaded mobile app.

Figure 5.9 Profile of mobile internet users, by gender

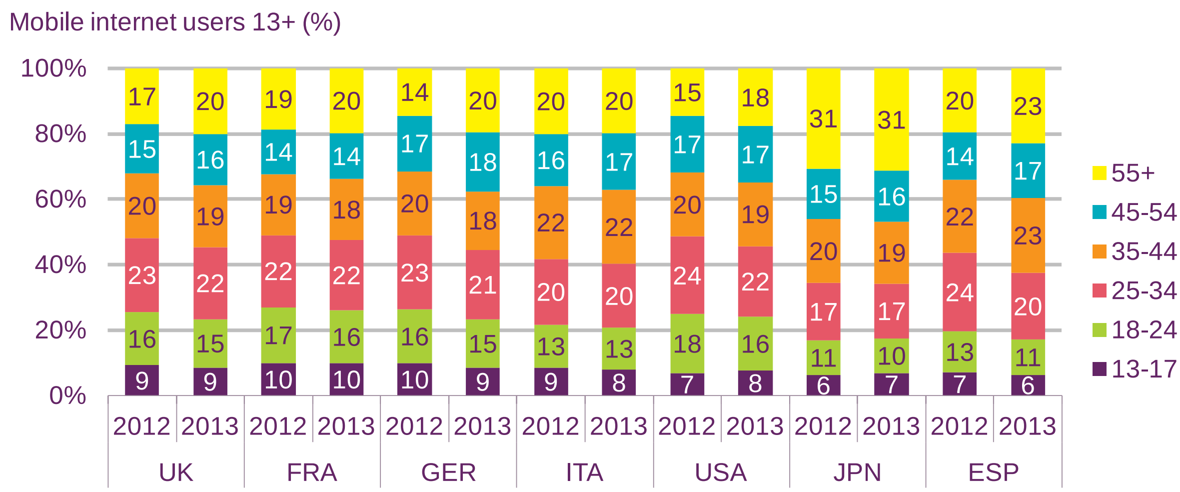


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

Mobile internet users are getting older, and are oldest in Japan

In August 2013 Japan had the highest proportion (31%) of mobile internet users aged over 55 among the comparator countries in Figure 5.10. Furthermore, over-55s made up the largest age group in Japan, in contrast to the other comparator nations where 25 to 34 year-olds, or 35 to 44 year-olds, were the largest age group. This probably reflects the earlier adoption of the mobile internet in Japan, and the subsequently greater take-up among older age groups. However, the other comparator countries are following Japan's lead, with the UK, France, Germany, the US and Spain all increasing their proportion of over-55 mobile internet users between August 2012 and August 2013.

Figure 5.10 Profile of mobile internet users, by age



Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

Smartphone take-up highest in the UK and Spain

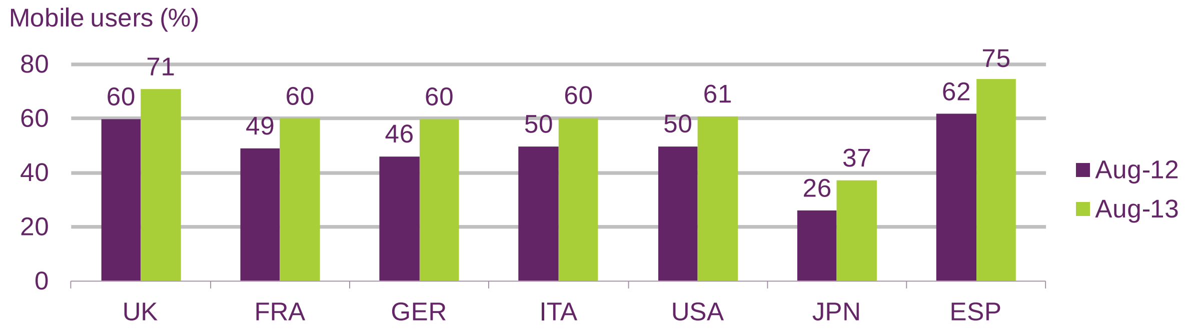
Smartphone take-up was highest in Spain, where three-quarters (75%) of mobile users owned such a device in August 2013. The UK had the second highest take-up, with seven in ten mobile users (71%) owning a smartphone, followed by the US (61%), and France, Germany and Italy (60%) all with six in ten mobile users.

The smartphone is likely to have been a strong contributory factor in take-up of the mobile internet. Larger screens, improved user interfaces, more advanced mobile browsers and mobile apps for specific functions are features of smartphones that make accessing the mobile internet easier than with past generations of phones. In the UK there has been a strong correlation between the take-up of smartphones and the take-up of the mobile internet, and by Q1 2013, 96% of all mobile internet users in the UK used a smartphone[58]. However, this is not universally the case.

Japan has a much longer history of mobile internet access than in Europe and North America, yet smartphone take-up was half (37%) that of Spain in August 2013. This can probably be explained by the advanced nature of feature phones in Japan, which have greater internet functionality than elsewhere in the world. In our consumer research 51% of respondents in Japan claimed to have a mobile phone, while only 34% claimed to have a smartphone. However, when asked what activities could be done on their mobile phone, 92% of mobile phone owners claimed they could access emails, 77% could access the internet, and 41% could download apps. Therefore, while many consumers in Japan claim not to have a smartphone, the capabilities of their handsets reflect some of the key characteristics that would categorise it as a smartphone in other markets. Nevertheless, consumers in Japan appear to understand the distinction between the advanced feature phones native to their own market and the latest smartphones which have been a worldwide phenomenon[59].

Despite differences, there was double-digit growth in smartphone take-up among all countries in Figure 5.11 between August 2012 and August 2013. Growth was greatest in Germany, where take-up was up by 14 percentage points, and smallest in Italy where it was up ten percentage points.

Figure 5.11 Smartphone take-up



Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile users aged 13+

Android has at least a 50% market share in seven of our comparator countries

The operating system (OS) of a smartphone is the software that determines: how the user interacts with the device, some of the device's functionality, the mobile browsing experience, and the apps which are available to download to the device. Third-party apps offer users a range of specific functionality for a range of activities; for example, social networking, games and news.

In August 2013, the majority of smartphone users across all the countries analysed had a handset running the Android operating system (Figure 1.12). Android's smartphone user

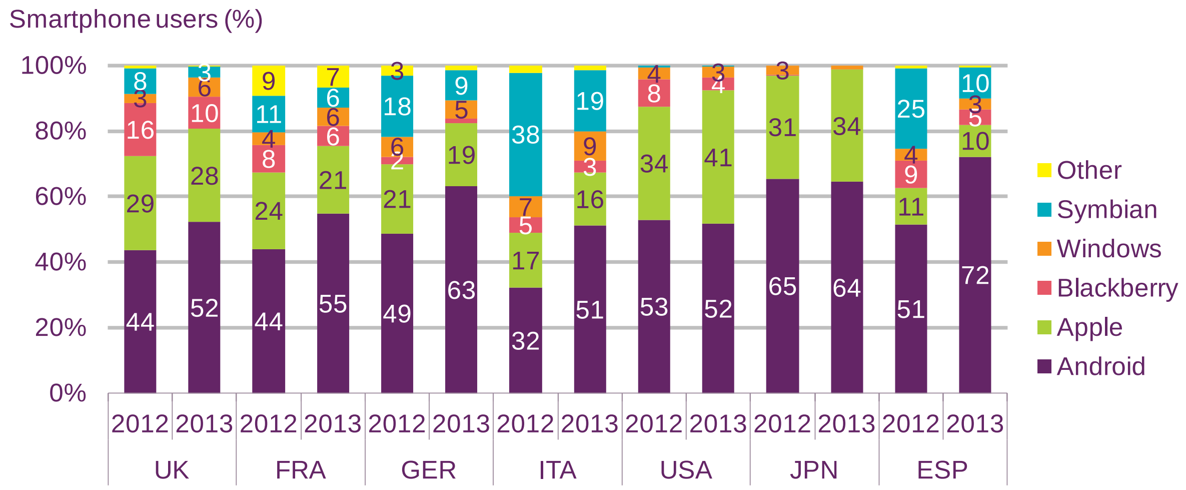
[58] *The UK Communications Market Report 2013*, Ofcom, August 2013, p.262

[59] comScore MobiLens classifies smartphones from a predefined list of operating systems that are open to developers and form the basis of a developer/content ecosystem. Respondents to our consumer research were asked to classify their handset as either mobile phone or smartphone: in response 34% claimed to own a smartphone, comparable to the 37% of mobile users in comScore's research.

share grew most in Spain, climbing 21 percentage points; from 51% in August 2012 to 72% in August 2013, while in the US and Japan Android's share dropped by one percentage point over the same period. Symbian's market share fell by half across UK, France, Germany, Italy and Spain, while the Blackberry OS also declined across all the comparator countries.

Apple's iOS was the second most popular operating system across most countries, with the exception of Italy, where Symbian retains a 19% share. Apple's smartphone user share grew in the US and Japan but declined among our European comparator countries. Microsoft's Windows mobile OS growth was inconsistent (Figure 5.12), growing in the UK, France, and Italy but declining in Germany, the US, Japan and Spain between August 2012 and August 2013.

Figure 5.12 Smartphone operating system take-up



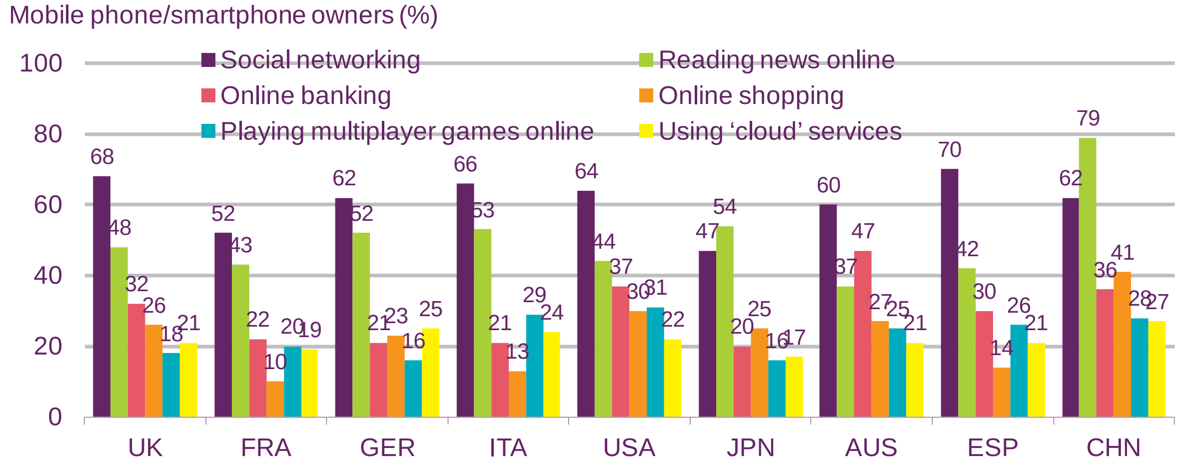
Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), smartphone users aged 13+

At least half of all mobile owners use their handset for social networking

Of the selected mobile phone activities shown in Figure 5.13, social networking was the most popular activity in all but two of the countries analysed. It was most popular among mobile phone and smartphone owners in Spain, where seven in ten users used their handset for social networking. In the UK just over two-thirds of owners claimed to access social networking sites on their phone. However, in Japan and China reading online news (54% and 79% respectively) was more popular than social networking (47% and 62% respectively).

The countries in which a particular mobile activity was most popular were: online banking in Australia (47%), online shopping in China (41%) and playing multiplayer games online in the US (31%). In the final third of this chapter we consider social networking and online news in more detail (p. 224) while in *The market in context* we examine online shopping in more detail (p. 39).

Figure 5.13 Mobile-internet activities



Source: Ofcom consumer research September 2013
Base: All respondents who access internet with a mobile phone/ smartphone, UK=572, FRA=456, GER=470, ITA=638, USA=437, JPN=581, AUS=550, ESP=703, CHN=866.
Q.15a Which, if any, of the following internet activities do you use each of your devices for?

5.2 Internet and devices

5.2.1 Introduction and key findings

As internet take-up has risen over the past decade, so has the number of devices which use it to communicate and deliver content. Internet-enabled devices play a large part in defining the consumer experience and the range of content, communications and services accessed on the internet. In this section we examine the popularity of these devices before considering internet access as a whole.

- Section 5.2.2 considers the **platforms** consumers use to access the internet, both fixed and mobile.

- Section 5.2.3 explores how **internet take-up** differs by age and gender among our comparator countries.

- Section 5.2.4 looks at the length of **time spent online** on laptop and desktop computers by internet users in a selection of comparator countries.

- Section 5.2.5 examines take-up of **internet-enabled devices** and how this varies by country.

Key findings

In summary, the key findings from this section of the chapter are:

- **Broadband households in the UK are most likely to have a fixed connection.** Among households with either a fixed broadband connection or a mobile broadband connection, households in the UK were the most likely to have a fixed connection (94%) and the second least likely overall to have a mobile connection (25%).

- **Laptop and desktop active audiences declined in France but stayed flat in the UK.** Only in France did the active audience on laptop and desktop computers fall (by 1.4%) between August 2012 and August 2013. In the UK and Japan audiences were stable; growing by just 0.9% and 0.2% respectively.

- **The laptop/desktop active audience in Spain and Italy is younger than elsewhere.** These internet users were much less likely to be aged 55 or older than in the rest of the comparator countries analysed. Just 14% of the audience in Spain and 15% in Italy were in this age group. In the UK, the active audience was more evenly distributed between age groups, with 23% aged 55 and over, and the remaining age groups making up a fifth (19-20%) each.

- **The UK and the US spend the most time browsing on laptop and desktop devices**. Internet users in the both countries averaged 36 hours browsing per month in August 2013, while internet users in Germany and Australia spent the least time browsing, at just 20 and 18 hours per month respectively.

- **UK internet users are the most likely to claim that their tablet is their most important device for going online.** One in twenty internet users (5%) said their tablet was their most important device for accessing the internet, the greatest proportion of any of the comparator countries analysed.

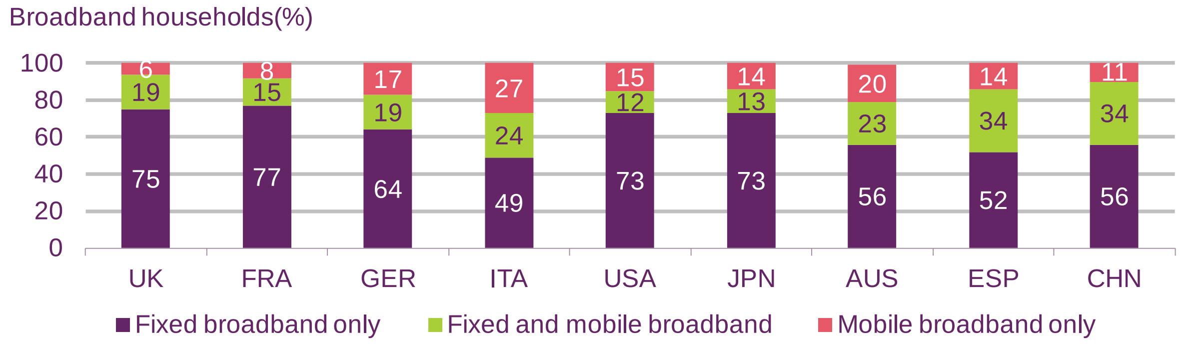
5.2.2 Internet take-up by platform

Broadband households in the UK are the most likely to have a fixed connection

Among households with either a fixed broadband connection or a mobile broadband connection, in the comparator countries shown in Figure 5.14, households in the UK were the most likely to have a fixed broadband connection (94%) and the second least likely overall to have a mobile broadband connection (25%). Broadband households in France were the least likely to have a mobile broadband connection (23%) while 51% of broadband households in Italy connected in this way. (A mobile broadband connection is via a dongle or laptop with a built-in SIM, and does not include mobile handset internet access).

Having access to both mobile and fixed broadband connections was most popular among broadband households in Spain and China (34%), while broadband households in the US and Japan were the least likely, at 12% and 13% respectively, to have adopted both technologies. Just under a fifth (19%) of broadband households in the UK had both fixed and mobile broadband connections.

Figure 5.14 Take-up of fixed and mobile broadband among broadband households



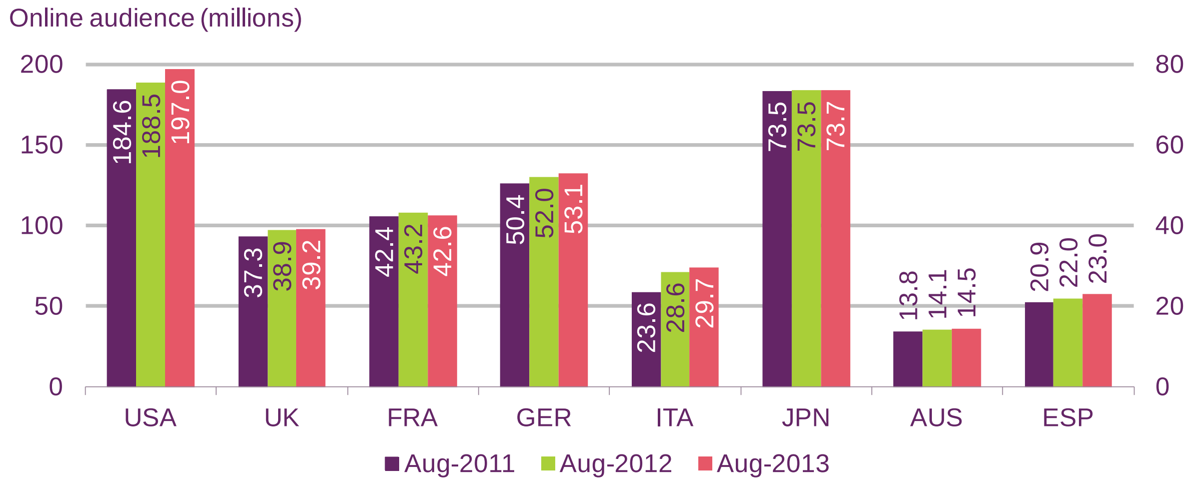
Source: Ofcom consumer research September 2013
Base: All respondents, UK=961, FRA=946, GER=892, ITA=920, USA=827, JPN=782, AUS=950, ESP=910, CHN=933.
Q3b. Which of the following services do you have in your home?

5.2.3 Internet take-up

Laptop and desktop active audiences declined in France but stayed flat in the UK

Only in France, of our comparator countries shown in Figure 5.15, did the active audience on laptop and desktop computers fall between August 2012 and August 2013. Despite this 1.4% drop, the active audience in France has not dropped below its August 2011 level. Among our other comparator countries, active audiences remained relatively flat in the UK and Japan; growing just 0.9% and 0.2% respectively between August 2012 and August 2013. Growth was greatest in Spain, where the active audience grew by 4.4% to 23 million, and in the US, where it grew 4.5% to 197 million.

Figure 5.15 Active audience on laptop and desktop computers: 2011-13



Source: comScore MMX, work and home panel, August 2011 to August 2013, persons 15+

comScore

This chapter predominantly draws from two comScore sources. For analysis of laptop and desktop computer internet activity we use comScore MMX™, which employs comScore's Unified Digital Measurement™ methodology, explained below. For analysis of mobile internet activity and user behaviours we use comScore MobiLens®.

Methodology

comScore's Unified Digital Measurement (UDM) methodology combines panel and census techniques for digital audience measurement. UDM uses comScore's country measurement panels to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. comScore combines census-level data with those captured from the panel, to help build a more accurate view of audiences and their consumption habits. This approach allows comScore to capture the most accurate consumption activity from publishers, and attribute this to audience demographics, in a manner that is not affected by cookie deletion, blocking, and rejection.

Metrics

Throughout this report we make reference to a number of metrics, defined below:

Unique audience – the total number of unique persons who visited a website or used an application at least once in a given month. They are counted only once, even if they visited the website many times.

Active audience – the total number of people who visited any website or used any internet-connected application at least once in a given month.

Active reach – the unique audience of a website as a proportion of the active audience.

Time spent per month – the average time spent browsing a website per unique visitor per month (excludes time spent watching online video and listening to streamed music).

Dictionary

Each of the entities reported by comScore is attributed to a level in comScore's *Client Focused Dictionary*. Several entities can exist within one website (e.g. BBC Sport and BBC iPlayer) and comScore's dictionary defines how these entities are structured and how they relate to each other. It is client-focused because comScore's clients define how their websites appear in reports according to this dictionary. This six-tiered dictionary structure is used by comScore MMX and we include a reference to it in square brackets where appropriate.

Property [P] *- The highest level of reporting in the Client Focused structure, Properties represent all Full Domains (i.e. felmont.com), Pages (i.e. sports.felmont.com/tennis), Applications or Online Services under the common ownership, or majority ownership, of a single legal entity. A Property may also contain any digital media content that is not majority owned but has been legally signed over for reporting purposes by the majority owner.*

Media Title [M] *- A Media Title is an editorially and brand-consistent collection of content in the digital landscape that provides the marketplace with a view of online user behaviour. This may represent a domain, a group of domains, or an online service or application.*

Channel [C], SubChannel [S], Group [G] and SubGroup [SG] *- Within a Media Title there may be grouped URLs of editorially consistent content that make up a Channel. For some of the largest Media Titles, Channels themselves may be broad, and Subchannels, Groups and Subgroups within the larger Channels may prove useful for categorisation within the comScore Dictionary.*[60]

About MobiLens

MobiLens data are derived from an online survey of a nationally representative sample of mobile phone subscribers aged 13 and above. Data on mobile phone use refers to a respondent's primary mobile phone and does not include data related to a respondent's secondary device.

The majority of laptop/desktop internet users in Japan are men, and in the US are women

Among our comparator countries, shown in Figure 5.16, Japan had the greatest imbalance between genders among those most likely to access the internet on a laptop or desktop computer. In Japan, 55% of the laptop and desktop active audience was male; slightly less skewed than in August 2012, when just 43% of this audience was female. The US is the only comparator country where the profile of the laptop/desktop active audience is skewed towards females, while in the UK, France, Germany and Italy the gender split is broadly even, with either little (≤ 2 percentage points) or no difference in the proportion of the active audience between men and women.

[60] "Glossary – Key Terms for comScore Dictionary", comScore.

Figure 5.16 Active audience on a laptop or desktop computer, by gender: 2012-2013

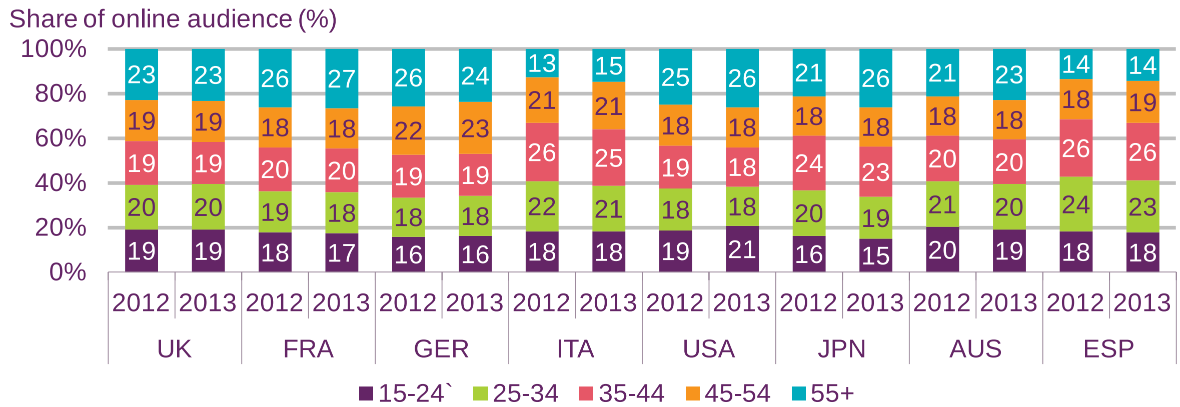
Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

The laptop/desktop active audience in Spain and Italy is younger than elsewhere

Laptop and desktop internet users in Italy and Spain were much less likely to be aged 55 or older than in the rest of the comparator countries shown in Figure 5.17. Just 14% of the laptop/desktop audience in Spain and 15% in Italy were in this age group, in contrast to France, where the 55 and over age group made up the largest proportion (27%) of laptop/desktop internet users. The laptop/desktop active audience in Spain and Italy was most likely to be aged between 35 and 44 years old. In the UK, active audience was more evenly distributed between age groups, with 23% aged 55 and over, and the remaining age groups accounting for a fifth (19-20%) each.

The greatest change in the age profiles of the laptop/desktop active audiences shown among comparator countries in Figure 5.17 was in Japan, where the over-55 age group grew by four percentage points, to 26%, between August 2012 and August 2013. The UK was the only comparator country to remain completely the same; the remaining countries were broadly similar, with year-on-year changes in age profile of two percentage points or less.

Figure 5.17 Active audience on a laptop or desktop computer, by age: 2012- 2013

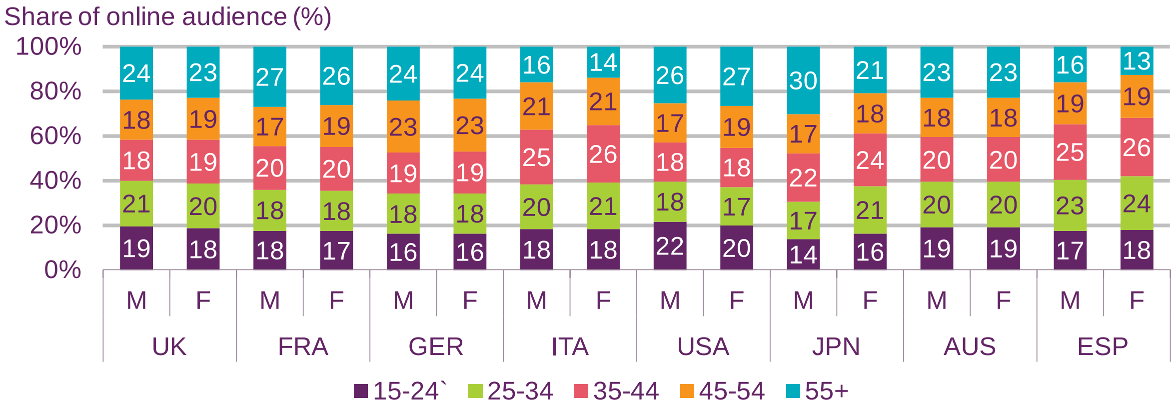


Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

In Japan male laptop/desktop internet users are more likely to be older than female users

In Japan male laptop/desktop internet users were more likely than female users to be aged 55 or over. Thirty percent of the male laptop/desktop active audience was in this age group, compared to just 21% of the female active audience. This pattern was reflected to a lesser extent among the other comparator countries in Figure 5.18 with the exception of Germany and Australia, where proportions were equal, and in the US, where female internet users were more likely to be older.

Figure 5.18 Active audience on a laptop or desktop computer, by age and gender: August 2013



Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

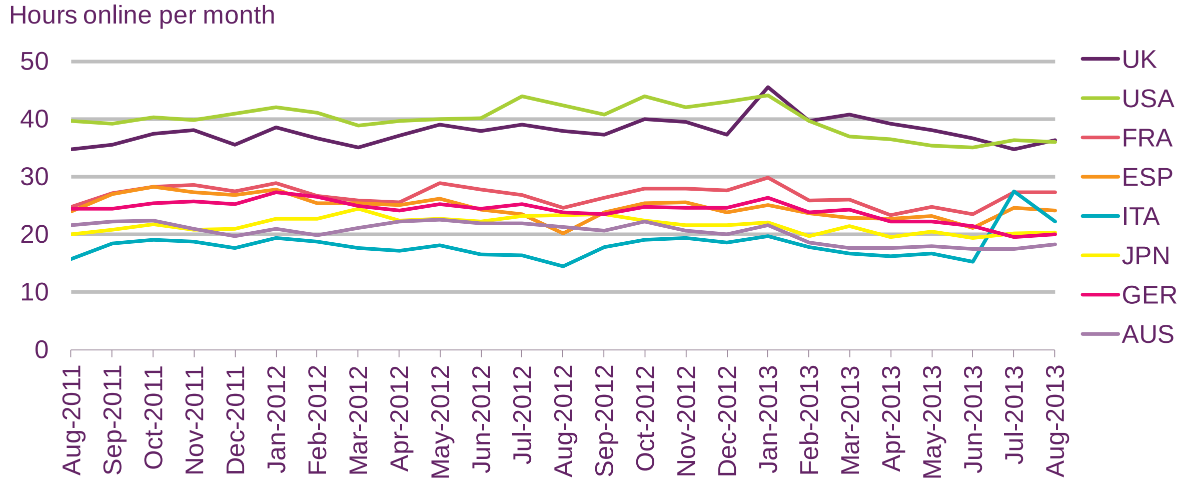
5.2.4 Time spent online

The UK and the US spend the most time browsing on laptop and desktop devices

Internet users in the UK and the US spent the most time browsing online on a laptop or desktop computer, of all our comparator countries in Figure 5.19, with an average of 36 hours per user in August 2013. Internet users in Germany and Australia spent the least time browsing, at just 20 and 18 hours respectively.

Across all comparator countries analysed, time spent browsing on a laptop or desktop computer declined between January 2013 and June 2013. This may reflect a seasonal pattern for the northern hemisphere comparator countries, with more time spent browsing in the winter months than in the summer. However, in the UK and US this pattern is not evident and the declines since January 2013 appear more marked than fluctuations in previous months, down by 23% and 18% respectively in H1 2013. This decline could reflect the substitution of laptop and desktop devices by other internet-enabled devices: we consider this in the next section.

Figure 5.19 Average time spent browsing on a laptop or desktop computer



Source: comScore MMX, work and home panel, August 2011 to August 2013, persons 15+
Note: Comparisons between data before and after January 2013 in the UK, March 2013 in the US, and July 2013 in France, Spain and Italy should be treated with caution due to a change in panel weighting methodology.

5.2.5 Internet-enabled devices

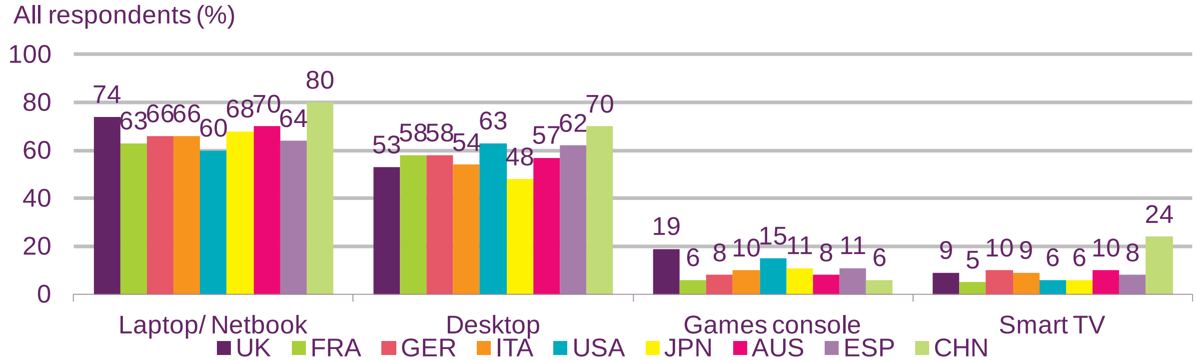
A fifth of UK respondents use their games console to access the internet

In all comparator countries in Figure 5.20 except the US, a laptop or netbook computer was the most popular fixed device for accessing the internet. However, in the US the desktop computer was the most popular; 63% of respondents used this device for accessing the internet, compared to 60% using a laptop. This is likely to be a reflection of the pattern of ownership in the US, which was also the only comparator country among those analysed to have a greater household take-up of desktop computers (73%) than laptops (70%).

Almost a fifth (19%) of UK respondents claimed to use a games console to access the internet. Take-up of games consoles in the UK was the second highest (56%) of all the comparator countries, behind Spain (60%) and ahead of Italy (52%), but in these two countries internet access on a console was about half the UK level, at 11% and 10% respectively. Internet access might be higher on games consoles in the UK because of the popularity of online gaming or other services available through these devices such as catch-up TV and video on demand (see section 1.6 Audio-visual consumption on web enabled devices).

Respondents in China were the most likely among the comparator countries analysed to access the internet using a laptop or netbook computer (80%), a desktop computer (70%), and a smart TV (24%). China also had the highest levels of take-up of these devices. However, the respondents to our consumer research in China are early adopters of the internet among the Chinese population, and so are likely to be early adopters of other communications technologies, in contrast to the respondents in the UK and other non-BRIC countries, where internet take-up is more widespread among the general population.

Figure 5.20 Fixed devices used to access the internet



Source: Ofcom consumer research September 2013
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.7a Which of the following devices do you use to access the internet?

A third of those online in the UK access the internet on a tablet computer

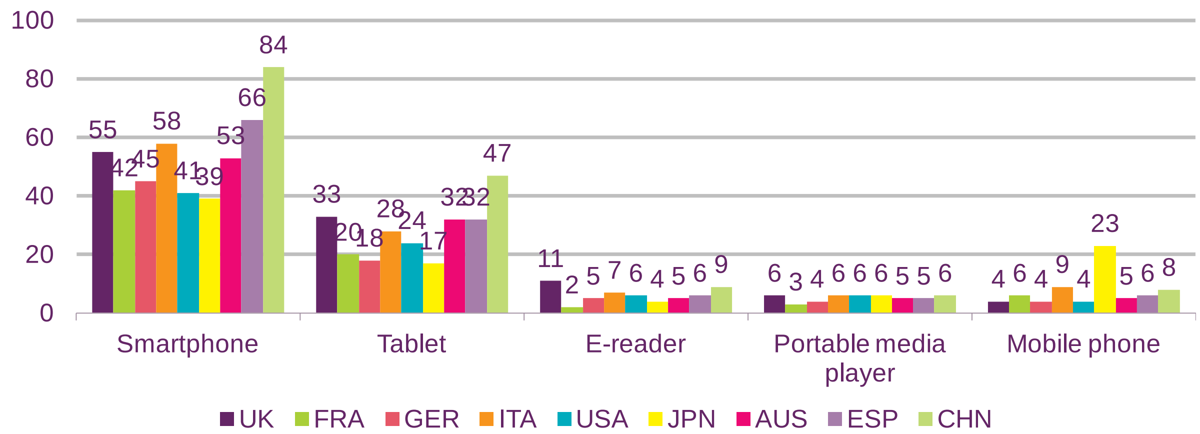
The take-up of 'fourth screen' devices has been rapid in recent years[61], driven by increasing consumer choice and the falling cost of devices. While accessing the internet on an e-reader was most popular in the UK (11%) among the analysed comparator nations, a third of respondents (33%) in the UK accessed the internet on a tablet.

Of the portable devices shown in Figure 5.21, the smartphone was the most popular device for accessing the internet in all the comparator countries analysed. In China the smartphone was the most popular device for accessing the internet, out of all fixed and portable devices, unlike in the non-BRIC countries, where either a laptop/netbook, or a desktop computer, was more popular.

In Japan, 23% of respondents access the internet through a mobile phone, the highest, by at least 15 percentage points, among the comparator countries analysed. In contrast, access on a smartphone was the lowest (39%) among the comparator countries. This is probably because of the advanced functionality that feature phone handsets have in Japan, and the much lower take-up among Japanese consumers of smartphones (34%)[62]. The distinction between smartphones and mobile phones in Japan is discussed earlier in this chapter in section 5.1.3.

[61] Household tablet ownership grew from 11% to 24% in the UK between Q1 2012 and Q1 2013, e-reader ownership grew from 14% to 22% in the same period (UK Communications Market Report, Ofcom, August 2013)
[62] Ofcom consumer research, September 2013. We also cite comScore MobiLens data in this report, which states smartphone take-up as 37% of mobile phone users in Japan.

Figure 5.21 Portable devices used to access the internet



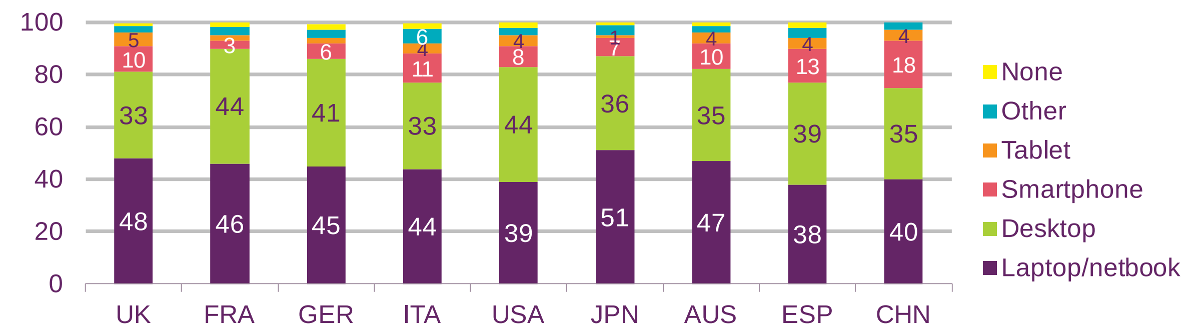
Source: Ofcom consumer research September 2013
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.7a Which of the following devices do you use to access the internet?

UK internet users are the most likely to say their tablet is their most important device for going online

In the UK, one in twenty internet users (5%) said their tablet was their most important device for accessing the internet, the greatest proportion of any of the comparator countries analysed. Ten per cent of internet users claimed their smartphone was most important, a similar proportion to internet users in Italy (11%) and Australia (10%) but less than in Spain (13%) and China (18%).

In all comparator countries in Figure 5.22, except the US and Spain, a laptop or netbook computer was the most popular choice as the most important device for accessing the internet, and in Japan, a majority (51%) of internet users claimed this. In the US, the desktop computer was the most popular device, reflecting the higher ownership of these devices (see above).

Figure 5.22 Most important device for accessing the internet



Source: Ofcom consumer research September 2013
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007
Note: 'Other' response is the aggregate of responses to for mobile phone, smart TV, video games console, ebook reader, portable media player, and other.
Q.7b Which is the most important device that you use to connect to the internet (at home, or elsewhere)?

5.3 Web-based content

5.3.1 Introduction

This section explores the kinds of content and services which people access through the internet and on the World Wide Web.

- Section 5.3.2 gives an **overview** of the most popular web properties across eight of our comparator countries.
- Section 5.3.3 focuses on **search**, the leading search engines, and the most popular and fastest rising search terms in the past year.
- Section 5.3.4 examines the take-up of **social networking** across different devices, the popularity of different social networking sites, and the use of check-in services.
- Section 5.3.5 looks at the reach of **online video** sites, the popularity of different services across platforms, and the type of online video consumed.
- Section 5.3.6 considers **online shopping** for digital content, and respondents' propensity to purchase or subscribe to content.
- Section 5.3.7 looks at the use of the internet for consumption of **online news** services.

Key findings

In summary, the key findings from this section of the report are:

- **A small number of key website properties are popular across all of our comparator countries.** A set of properties providing similar services – Google, Yahoo! and Microsoft – appeared in the top ten for the majority of countries compared. A range of multimedia publishing groups also appeared among the most popular properties in each country analysed.
- **Social networks remain among the most searched-for terms online.** 'Facebook' was the most searched-for term on the web for 14 of our 17 comparator countries, while national social network 'VK' was among the most searched-for terms in Russia.
- **Mobile internet users in the US and the UK are the most active social networkers.** Two in five mobile internet users in the US (41%) and the UK (40%) used their handset to visit a social networking site almost every day in August 2013.
- **Two-thirds of laptop/desktop internet users in the UK visited YouTube in August 2013**. YouTube was most popular in the UK among laptop and desktop internet users (66%) and least popular in Japan (53%).
- **Users in the UK and the US were the most likely to pay a subscription for TV, film, and music streaming services.** Of all respondents who accessed films weekly, more than half (57%) in the US and 45% in the UK paid a subscription fee for the service. One quarter of respondents in the UK who regularly streamed music claimed to pay a subscription to a music streaming service, more than in any other country compared.

5.3.2 Overview

A small number of key web properties were popular across all of our comparator countries

A handful of web properties were popular with internet users across all the comparator countries, as shown in Figure 5.23. Google sites and Microsoft sites appeared in the top ten for every one of our comparator countries, while Yahoo! sites featured in the top ten for all but Germany. These properties own web portals which feature a range of similar services, such as web search, email, news and weather. Furthermore, Google-owned sites were the most popular properties across all of the countries compared, except in the US, where Google sites were second to Yahoo! sites. The popularity of online shopping was also evident; Amazon and eBay appeared in the top ten across a number of the comparator countries, alongside Japan's Rakuten.

Alongside these global web properties were popular national websites, such as the BBC in the UK and CBS in the US. These both provide regional written and audio-visual content such as news, sport and entertainment. A number of privately-held media groups and multimedia publishing groups appeared among the top ten web properties, such as Axel Springer (which publishes *Bild*, a German tabloid newspaper) and RCS Media Group (which publishes *Corriere Della Sera*, a newspaper in Italy). Glam Media is a lifestyle content publisher and featured in the top ten properties of the UK (where it publishes the MailOnline), the US and Australia.

Figure 5.23 Top ten web properties accessed on a laptop and desktop computer, by country

	UK		FRA		GER		ITA		USA		JPN		AUS		ESP	
1	Google sites	-	Google sites	-	Google sites	-	Google sites	-	Yahoo! sites	+2	Google sites	+1	Google sites	+1	Google sites	-
2	Microsoft sites	-	Microsoft sites	-	eBay	+1	Facebook	-	Google sites	-1	Yahoo! sites	-1	Microsoft sites	-1	Microsoft sites	-
3	Facebook	-	Facebook	-	Deutsche Telekom	+5	ItaliaOnline	+2	Microsoft sites	-1	FC2	-	Yahoo! sites	+1	Facebook	-
4	Amazon sites	+2	Wikimedia	+3	Amazon sites	+1	Yahoo! sites	-	Facebook	-	NHN	-	Facebook	-1	Unidad Medias Digitales	N
5	Yahoo! sites	-1	Schibsted	+5	Axel Springer	+2	Microsoft sites	-2	AOL	-	Microsoft sites	+1	Apple	-	Prisa	+1
6	eBay	-1	Yahoo! sites	-1	Facebook	-4	Wikimedia	-	Amazon sites	-	Amazon sites	-1	Wikimedia	-	Yahoo! sites	-1
7	BBC sites	-	Solocal	+1	Microsoft sites	-3	Banzai	-	Glam Media	+2	DMM	N	BitTorrent	+3	Wikimedia	+2
8	Wikimedia	+1	CCM-Benchmark	-2	United Internet	-2	eBay	-	Wikimedia	-	NTT	+2	Glam Media	+1	Terra Telefonica	-4
9	Glam Media	-1	Orange	-5	Wikimedia	-	RCS Media Group	+1	CBS	+1	Wikimedia	-	eBay	-2	Vocento	-2
10	Apple	-	Amazon sites	N	Hubert Burda Media	-	Gruppo Editoriale Espresso	N	Ask	-3	Rakuten	-2	Ask	-2	Schibsted	-2

Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+
Note: Coloured font indicates brand appears more than once. Web property audience includes relevant internet application audiences where available. '+' or '-' and a number denotes change in rank since 2012 comScore data, '-' only denotes no change, and 'N' denotes a new entrant to the top ten.

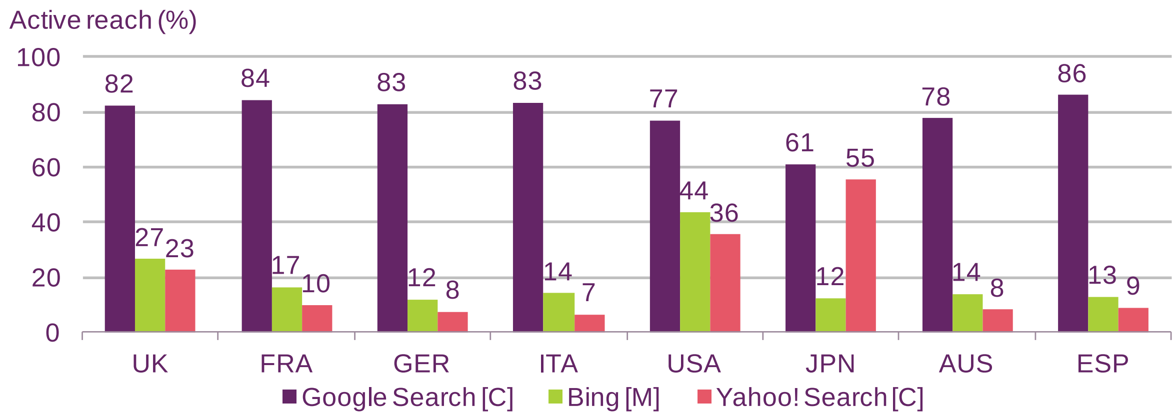
5.3.3 Search

Google is the most popular search engine across the EU5, the US, Australia and Japan

Google was the most popular search engine across all of the comparator countries in Figure 5.24. Google was most popular in the European countries analysed, where over 80% of internet users in each country visited the search engine in August 2013, and least popular in Japan, where only 61% of internet users did the same. Japan was also the comparator country in which Google's lead was narrowest, with a margin of just six percentage points over Yahoo! This reflects the strong history of Yahoo! in Japan, where the Japanese internet and telecommunications company Softbank is the majority shareholder[63], rather than Yahoo! Inc. itself.

More than a quarter (27%) of internet users aged fifteen and older in the UK visited Bing in August 2013. This made the UK the comparator country in which Bing was most popular, second only to the US (44%), where Bing is based.

Figure 5.24 Active reach of selected search engines on laptop and desktop computers



Source: comScore MMX, home and work panel, August 2013, persons 15+

Social networks were among the most searched-for terms online in the majority of our comparator countries

The most popular search term on Google for 14 of our 17 comparator countries (all except Japan, Russia and China) in the year up to August 2013 was 'facebook'. Furthermore, 'instagram', (a photo sharing website owned by Facebook since April 2012[64]), was the search term with the largest proportional increase over the year in the UK, the US, Canada and Ireland. However, Facebook appears to be less popular in Russia, where Russian social networks 'Odnoklassniki' and 'VKontakte' were two of the top three most searched-for terms, and 'vk' the abbreviation of VKontakte was the search term with the largest increase.

Google users in Australia and Brazil searched for terms related to television; the fastest-rising search terms in both countries related to the reality television programme *Big Brother*. The fastest-rising search term in India, WhatsApp (an instant messaging mobile app) follows the growing popularity of instant messaging among smartphone users. We discuss instant messaging in more detail in section 6.3.4 in the Telecoms and Networks chapter.

[63] Yahoo! Japan Investor Relations, http://ir.yahoo.co.jp/en/holder/status.html
[64] BBC News, http://www.bbc.co.uk/news/technology-17658264

Figure 5.25 Most popular search terms on Google between August 2012 and August 2013

Country	1ST	2ND	3RD	Largest increase
UK	facebook	bbc	google	instagram
FRA	facebook	bon coin	youtube	filmze
GER	facebook	ebay	google	samsung galaxy s3
ITA	facebook	libero	mail	ask
USA	facebook	google	you	instagram
CAN	facebook	google	youtube	instagram
JPN	yahoo	天気[1]	youtube	パズドラ[2]
AUS	facebook	youtube	google	big brother
ESP	facebook	hotmail	youtube	toroporno
NED	facebook	google	marktplaats	windows 8
SWE	facebook	google	youtube	dreamfilm
IRL	facebook	youtube	google	instagram
POL	facebook	onet	allegro	kinomaniak
BRA	facebook	jogos	hotmail	bbb13
RUS	одноклассники[3]	скачать[4]	вконтакте[5]	вк[6]
IND	facebook	songs	video	whatsapp
CHN	百度[7]	是[8]	草榴[9]	百度一下[10]

Source: Google Insights Search Tool, August 2012 to August 2013. Notes: 1. weather 2. pazudora (game) 3. classmates (odnoklassniki.ru) 4. download 5. vkontakte (social network) 6. vk 7. baidu 8. yes 9. caoliu (Chinese internet forum) 10. baidu,

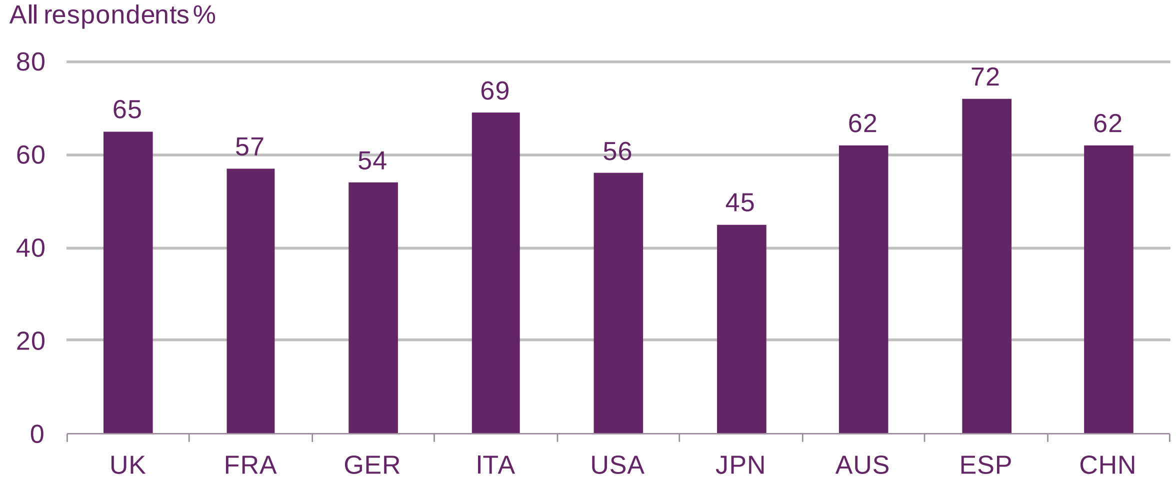
5.3.4 Social networking

The majority of internet users accessed a social networking site at least once a week

Japan was the only comparator country in Figure 5.26 where a minority (45%) of respondents to our consumer research claimed to use their internet connection to access social networking sites at least once a week. Social networking was most popular in Spain, where 72% of internet users accessed a social network at least once a week. This is reflected in the higher active reach of Facebook in Spain (see Figure 5.29) as well as Spanish social network Tuenti (18% active reach[65]). Social networking was also popular in the UK, Italy, Australia and China, where at least six in ten internet users in each country visited a social networking site at least once a week.

[65] comScore MMX, Spain, home and work panel, August 2013, persons 15+

Figure 5.26 Weekly access to social networking sites



Source: Ofcom consumer research September 2013.
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

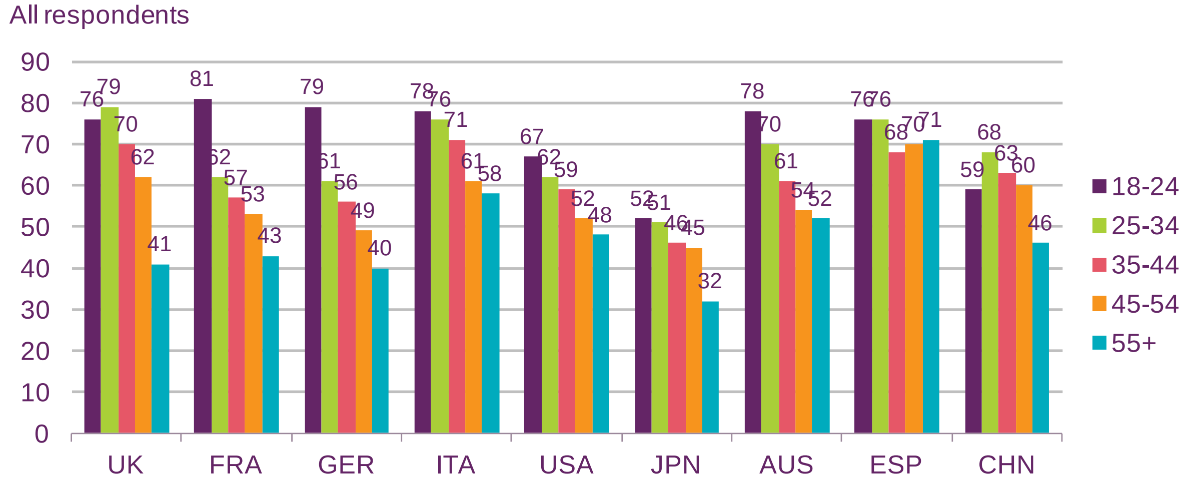
Social networking in the UK is most popular among respondents aged 25 to 34

In the UK and China, social networking was more popular among respondents aged 25-34 than those aged 18-24. This was in contrast to the rest of the comparator countries in Figure 5.27, where take-up was highest among 18-24 year olds. Furthermore, the UK had the highest overall level of take-up among 25-34 year olds, of all the comparator countries.

Comparing all age groups across all countries, social networking was most popular among 18-24 year olds in France. France was also the country with the biggest difference in popularity between the two younger age groups, with a 19 percentage point difference in use between 18-24s and 25-34s.

The general trend among our comparator countries, as shown in Figure 5.27, was that weekly access to social networking sites tended to decline with age after the age of 35 and was lowest among internet users aged 55 or over. The exception was Spain, where more than seven in ten (71%) respondents aged 55 or over visited a social network at least once a week, marginally more than 35-44 year olds (68%) and 45-54 year olds (70%) in that country.

Figure 5.27 Weekly use of home internet connection to visit social networking sites by age



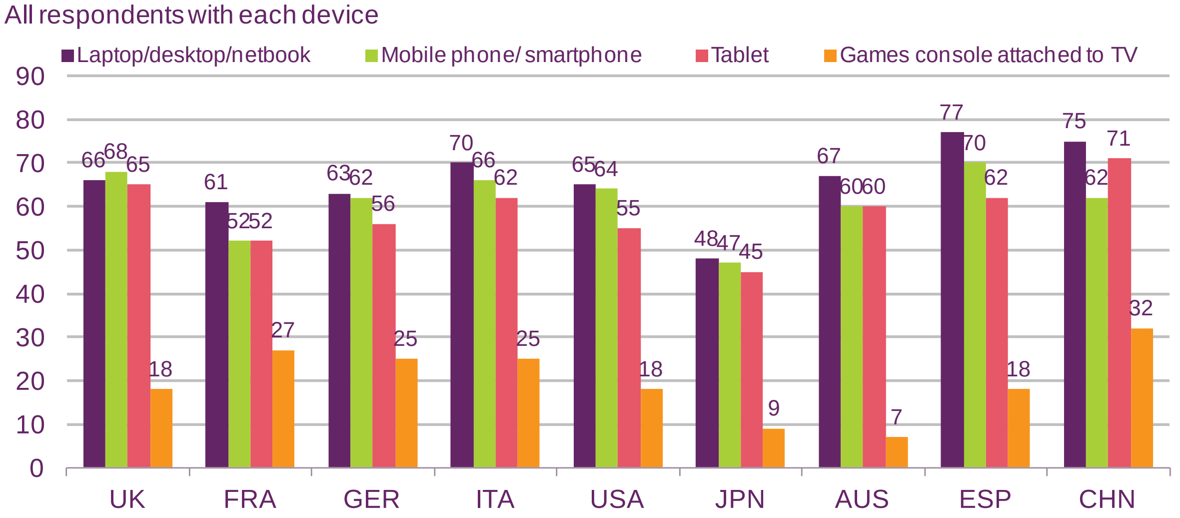
Source: Ofcom consumer research September 2013.
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

Mobile phone owners in the UK are more likely than laptop and desktop owners to use their device to access social networks

The UK was the only comparator country considered in Figure 5.28 in which owners of mobile phones and smartphones were more likely than owners of laptops and desktops to use their device to access social networks (68% vs. 66%). Generally, however, respondents did not tend to have a strongly preferred device for accessing social networking sites. The proportion of mobile phone and smartphone owners using their device to access social networks was similar to the proportion of laptop, desktop and netbook owners doing so in many of the comparator countries, and there was a difference of less than five percentage points between these two categories in the UK, Germany, Italy, the US and Japan. China was the only country in which owners of tablets were more likely than smartphone and mobile phone owners to use their device to visit social networks. Spain was the country with the biggest differences in access behaviour between owners of these devices.

Owners of games consoles were the least likely to use their device to access social networks, by a notable margin, in all the countries compared. This could be due to difficulty in accessing social networks through these devices, or to the limited functionality of social networks accessed on fixed games consoles compared to access on a computer or smartphone. Furthermore, social networking is a private communications activity less suited to the communal nature of a TV set.

Figure 5.28 Accessing social networking sites, by device ownership



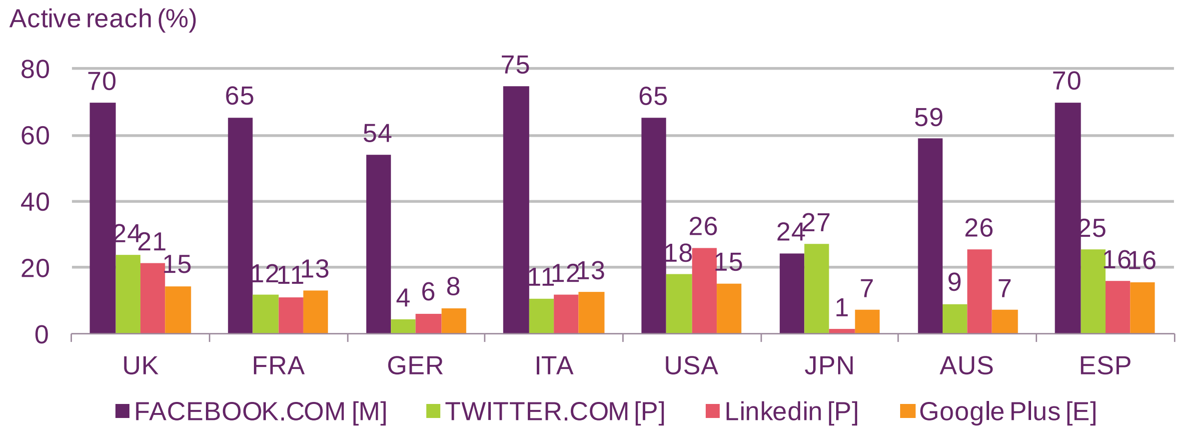
Source: Ofcom consumer research September 2013.
Base: All respondents with each device, laptop/desktop/netbook 908-966 in each market, mobile phone/ smartphone 437-866 in each market, tablet computer 171-476 in each market, games console attached to TV 59-189 in each market.
Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

Twitter is more popular than Facebook in Japan

Japan was the only comparator country in Figure 5.29 where Twitter was more popular than Facebook (27% vs. 24%) in August 2013. Furthermore, the proportion of internet users visiting Twitter was higher in Japan than in any of the other comparator countries analysed. In contrast, Germany had the fewest internet users visiting the social network in the same period (4%).

But Facebook was the most popular social network, by a significant margin, in seven of the eight comparator countries; shown in Figure 5.29. Among these countries, Facebook was most popular in Italy, where three-quarters (75%) of respondents accessed it at least once in August 2013. The UK and Spain were also among the countries where Facebook was most popular; seven in ten respondents in each country visited the social network at least once in August 2013.

Figure 5.29 Active reach of selected social networking sites on laptop and desktop computers



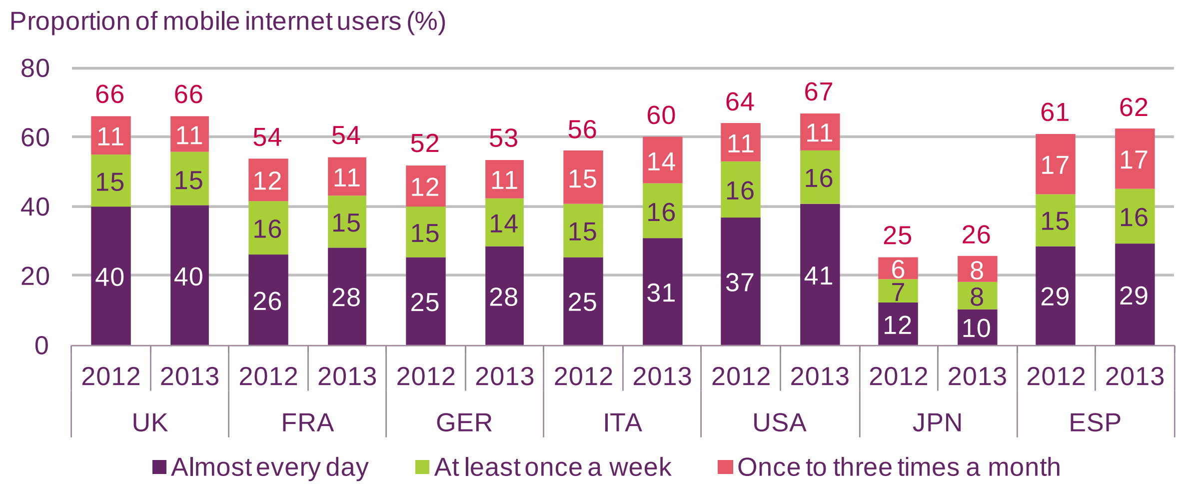
Source: comScore MMX, home and work panel, August 2013, persons 15+

Mobile internet users in the US and the UK are the most active social networkers

The UK was second only to the US in the proportion of mobile internet users who used their handset to visit a social networking site in August 2013. The UK also had the second highest proportion of daily users, after the US, with two-thirds of UK mobile social networkers stating that they visited a social networking site using their handset almost every day. Daily use of social networking sites was on the increase for the majority of our comparator countries in Figure 5.30. In France, Germany, Italy and the US the proportion of daily users rose in the past year, with Italy having the greatest increase in users who accessed social networks almost every day. Japan was the only comparator country in which the proportion of mobile internet users accessing social networks daily fell between August 2012 and August 2013.

The proportion of mobile social networkers in the UK remained static between August 2012 and August 2013, with no change in the proportions of UK mobile internet users using their handset to a visit a social networking site monthly, weekly or daily. This was different to the majority of the other comparator countries, where the proportion of mobile internet users accessing social networks at least once a month increased over the year.

Figure 5.30 Monthly accessing of social networking sites on mobile phones



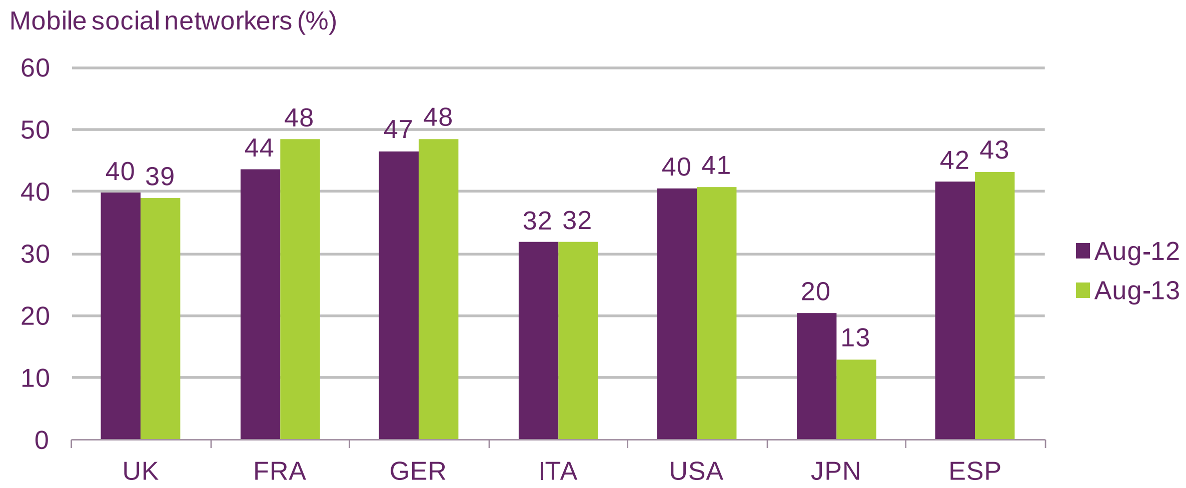
Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

Use of social check-in services fell significantly among mobile social networkers in Japan

Social check-in services allow smartphone users to mark and share their location with online friends or followers by using the GPS functionality of their handset. The proportion of mobile social networkers using check-in services in Japan fell by seven percentage points; from 20% to 13%, between August 2012 and August 2013. This is despite the fact that the proportion of mobile internet users in Japan accessing social networks at least once a month increased slightly over the year (see Figure 5.30).

Considering the other comparator countries in Figure 5.31, use of check-in services increased among mobile social networkers in France, Germany, the US and Spain. The biggest increase was among social networkers in France, where 48% of mobile social networkers used check-in services in August 2013, compared to 44% who did so in August 2012. The proportion of mobile social networkers 'checking-in' was static in Italy over the year, and the proportion fell by one percentage point; to 39%, among UK mobile social networkers.

Figure 5.31 Use of social check-in services by mobile social networkers



Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile social networkers aged 13+

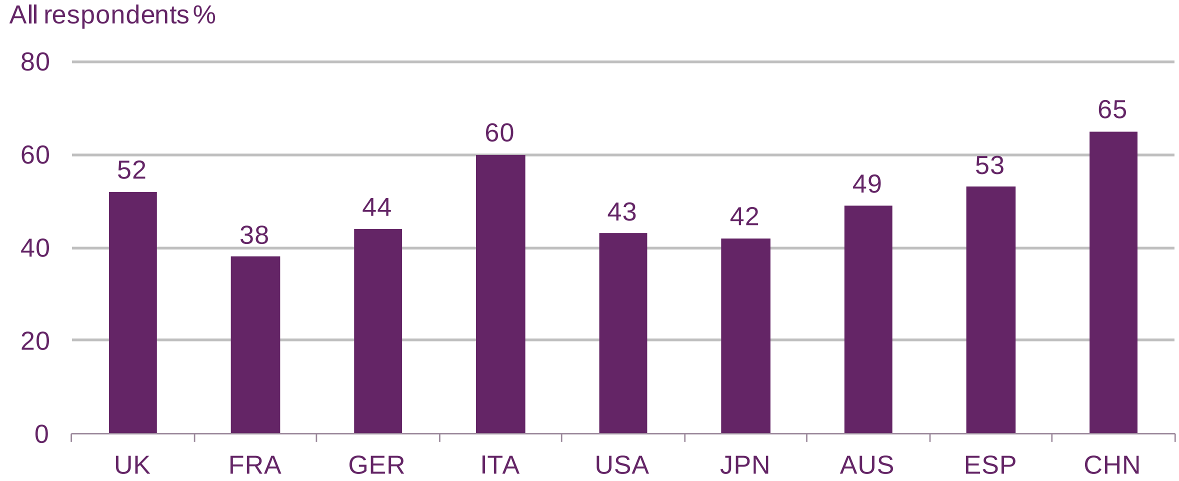
5.3.5 Online video

Two-thirds of internet users in China watch online video clips every week

Online video clips were most popular among internet users in China, with two-thirds of respondents (65%) stating that they accessed online video clips at least once a week. In comparison, less than four in ten respondents in France (38%) stated that they accessed online video clips weekly.

Online video clips were also popular among internet users in the UK, Italy and Spain, where over half of respondents in each country stated that they accessed such clips at least once a week.

Figure 5.32 Weekly access of online video clips



Source: Ofcom consumer research September 2013.
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

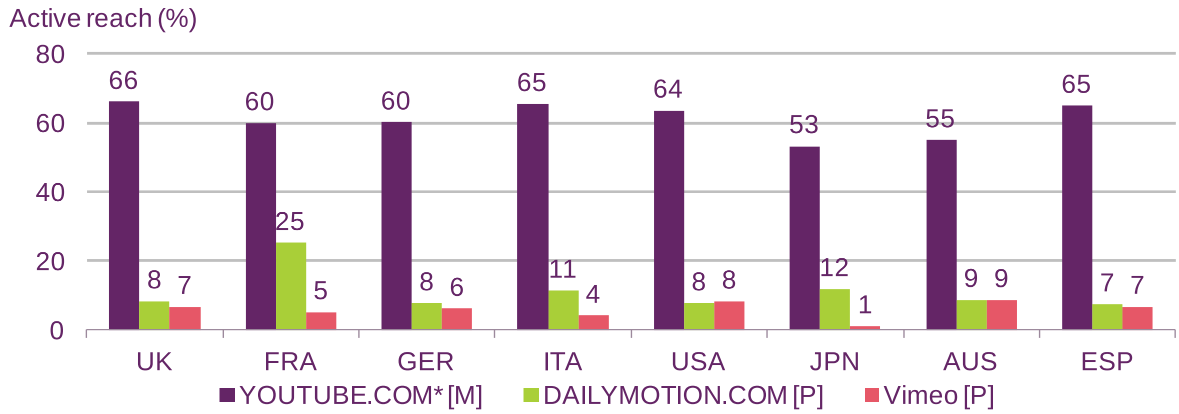
Two-thirds of laptop/desktop internet users in the UK visited YouTube in August 2013

YouTube was more popular in the UK than in any other comparator country in Figure 5.33, with two-thirds (66%) of UK internet users visiting the website at least once a month. YouTube was significantly more popular than any other of our selected online video websites across all the comparator countries in Figure 5.33, with over half of respondents in each comparator country stating that they visited YouTube at least once a month. The popularity of YouTube was also evident from our analysis of the most popular search terms on Google (Figure 5.25), where it appeared in the top three most searched-for terms in five of the eight countries analysed in Figure 5.33. Furthermore, YouTube states that the number of hours of video watched worldwide each month since 2012 has increased by 50%[66].

YouTube's lead was narrowest in France, where a quarter (25%) of internet users visited Dailymotion a French video sharing website, in August 2013, against the 60% of users who visited YouTube in the same period. Dailymotion was the second most popular video sharing website for five of the eight countries analysed, and its active reach was equal to that of Vimeo in the remaining three. However, only video sharing sites with a worldwide reach were considered in this analysis. Sites specific to certain countries, such as Niconico in Japan, which had an active reach of 44% in the year up to August 2013[67], may be much more popular in those countries.

[66] YouTube Statistics, https://www.YouTube.com/yt/press/en-GB/statistics.html
[67] comScore MMX, Japan, home and work panel, August 2013, persons 15+

Figure 5.33 Active reach of selected online video websites on laptop and desktop computers



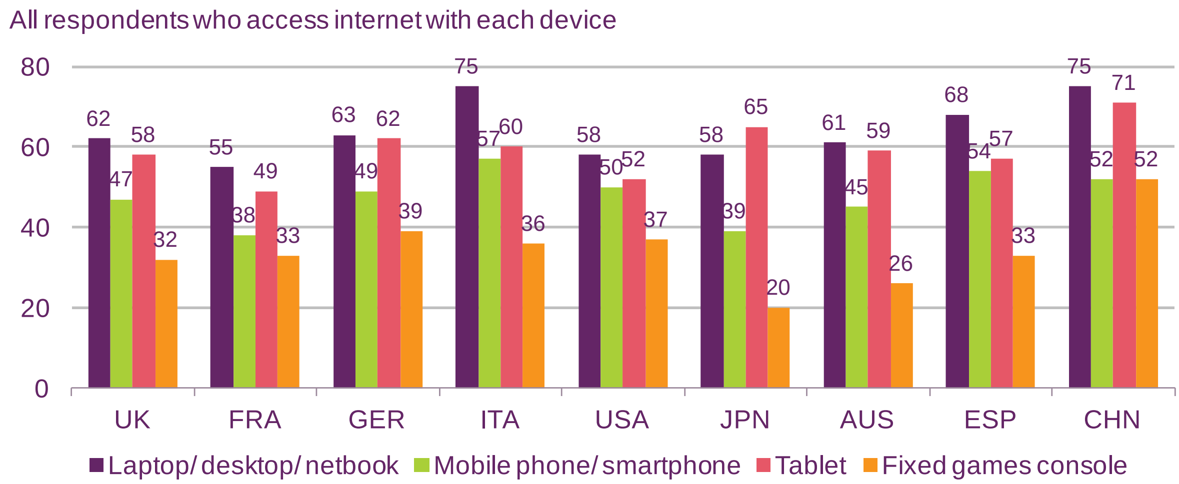
Source: comScore MMX, home and work panel, August 2013, persons 15+

Watching online video clips is more popular among tablet owners than mobile phone and smartphone owners

Mobile phone and smartphone users in the UK were noticeably less likely than owners of laptops/desktops/netbooks and owners of tablet computers to access online video clips using their device. This was also true of a number of our comparator countries (France, Germany, Japan, Australia and China) and may reflect consumers' concerns about data consumption when using their handsets' cellular connections. Generally, laptop, desktop and netbook owners were the most likely to access online video clips using their device, in all the comparator countries in Figure 5.34, except Japan, where owners of tablet computers were more likely to use that device to watch online video clips.

Owners of fixed games consoles were found to be among the least likely respondents to use their device to access online video clips, in every country analysed. This may be due to the greater difficulty in using this kind of device for watching online clips, in comparison to using a laptop or tablet.

Figure 5.34 Accessing online video clips, by device ownership



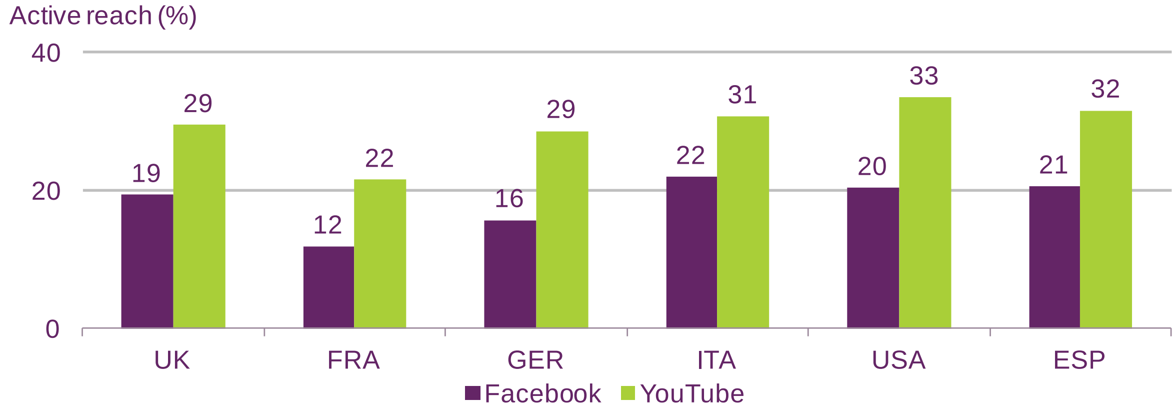
Source: Ofcom consumer research September 2013.
Base: All respondents with each device, laptop/desktop/netbook 908-966 in each market, mobile phone/ smartphone 437-866 in each market, tablet computer 171-476 in each market, games console attached to TV 59-189 in each market.
Q.15c What sorts of video content do you watch on each of your devices over the internet?

A third of mobile internet users in the US use YouTube to view online video

This analysis is restricted to the comparison of two websites, YouTube and Facebook, which have a worldwide reach across the majority of laptop and desktops users (see Figure 5.29 and Figure 5.33). Of the two, YouTube was the most popular website among mobile internet users for viewing online videos. YouTube was most popular in the US, where a third (33%) of mobile internet users visited the site at least once in August 2013, and least popular in France, where only around a fifth (22%) of mobile internet users did the same. YouTube's lead was narrowest in Italy, where 22% of mobile internet users visited Facebook to view online video content, compared to 31% who visited YouTube.

However, this analysis does not differentiate between video content hosted by Facebook, such as user-generated uploads, and video content shared on Facebook from sites like YouTube. Furthermore, the proportion of mobile internet users watching online video content using their handset is still a minority. Should this activity become more widely adopted, a greater range of video viewing sites may appear alongside the ones which are currently popular.

Figure 5.35 Active reach of selected websites for viewing online video on mobile



Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+

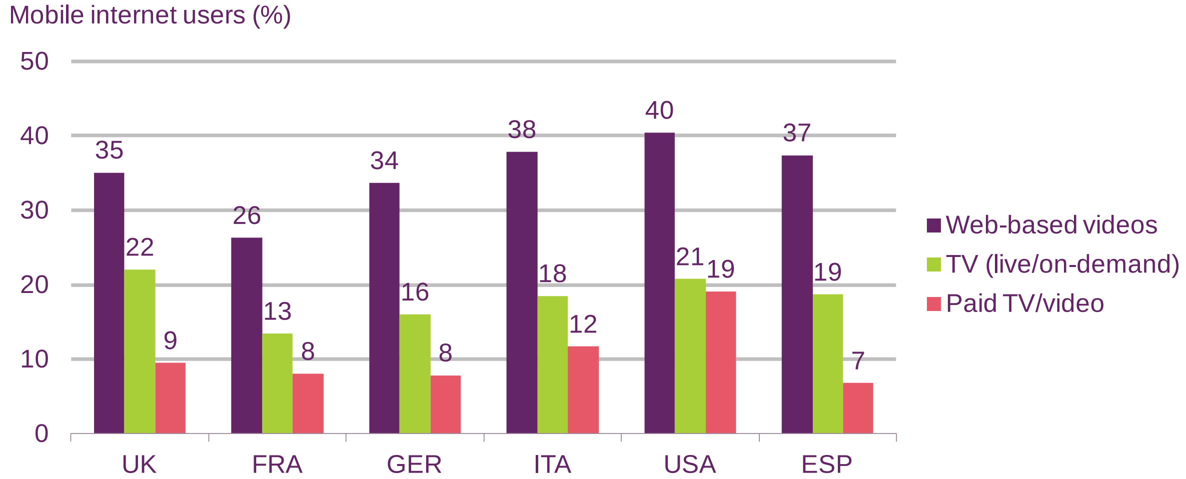
Web-based videos were by far the most popular type of video content that consumers accessed on mobile

Mobile internet users were far more likely to access web-based videos than any other kind of TV or video content. 'Web-based video' refers to free videos or video clips on websites that are accessible using a browser or the website's application. The popularity of web-based video content among mobile internet users may be due to the short format of the video content on websites such as YouTube and Vimeo. These short clips are more practical than other forms of video to access using a mobile device. Watching short clips on mobile devices also uses less data than watching longer television programmes, which could deter consumers concerned about their mobile data use.

Respondents in the US were among the most likely to access all these types of video content on a mobile device, and those in France were among the least likely. Watching TV (live or on demand) was the second most popular type of video-watching activity on mobile devices across all of our countries in Figure 5.36, with mobile internet users in the UK more likely to watch TV using their handset (at 22%) than users in any of the other countries analysed.

Respondents in all of the comparator countries in Figure 5.36 were least likely to access paid TV or video using a mobile device. This could reflect the fact that mobile internet users may be reluctant to pay for online video content, or that users may find it unsatisfactory to watch paid-for professional long-form content on mobile devices, which tend to have small screens. Consumers' attitudes to TV and audio-visual content are explored further in section 3.1.

Figure 5.36 Type of TV/video service accessed on mobile



Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+

5.3.6 Online shopping

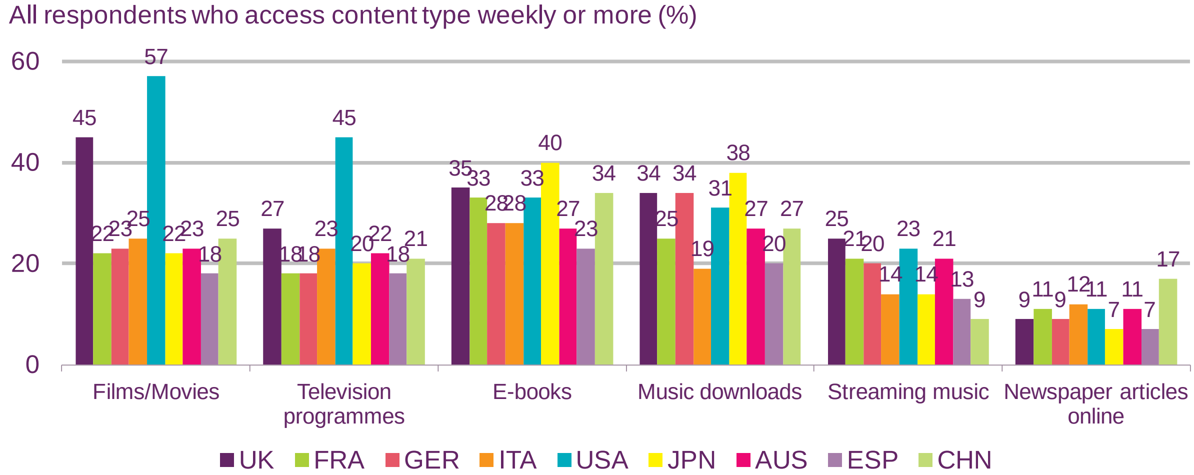
We consider online shopping and the delivery of physical goods in the *Market in context* chapter of this report in section 1.4. However, the following analysis looks at the purchase of, and subscriptions for, digital goods.

Users in the UK and the US were most likely to pay a subscription for TV, film, and music streaming services

Regular users in the UK and the US were the most likely to pay a subscription fee to access film and television content, across all of the comparator countries in Figure 5.37. Of all the respondents who accessed films weekly in the US, more than half (57%) paid a subscription fee for the service, as did 45% in the UK. These subscriptions are likely to relate to over-the-top (OTT) video content providers available in the US and the UK, such as Netflix and LoveFilm, but could also be the web-accessed services offered by pay-TV operators.

The UK was the country in which respondents who regularly streamed music were most likely to pay a subscription to a music streaming service. A quarter (25%) of regular users claimed to subscribe to a service, such as Spotify or Deezer, followed by 23% of regular music streamers in the US. Respondents across the majority of countries compared were least likely to pay a subscription fee to access newspaper articles online, with the exception of China, where subscriptions to music streaming services were less likely than subscriptions to online newspaper articles among regular users.

Figure 5.37 Proportion of regular users who pay a subscription fee for access



Source: Ofcom consumer research September 2013
Base: All respondents who access films/ movies online 221-655, who access TV programmes online 309-804, who stream music online 205-877, who download music 110-622, who access newspaper articles online 506-728, who access e-books online 80-600
Q.13b Do you pay a subscription fee to access any of this content online?

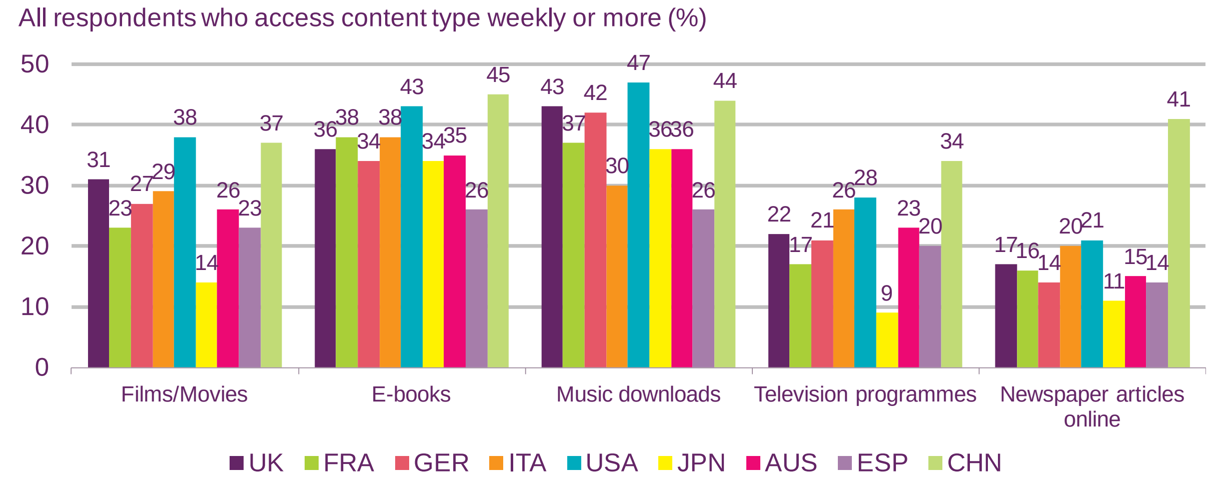
Users in the US and China were most likely to buy or rent content

Those who regularly accessed films, e-books, music downloads, TV programmes and newspaper articles in the US and China were the most likely to buy or rent these content types at least once a week. Just under half (47%) of regular music users in the US paid for music downloads at least once a week, while 44% of users in China and 43% of users in the UK did the same.

Respondents in Japan who regularly accessed film and television content were significantly less likely (14% and 9%) than respondents across all the other countries analysed to buy or rent this content at least once a week. In contrast, more than twice as many regular users bought or rented films at least once a week in the US (38%), China (37%) and the UK (31%).

However, the US and China differed most in regular users' propensity to buy or rent newspaper articles online. Two-fifths (41%) of regular users in China claimed to buy or rent this content at least once a week, in contrast to the US where half as many consumers did so (21%).

Figure 5.38 Proportion of regular users who buy or rent content at least once a week



Source: Ofcom consumer research September 2013
Base: All respondents who access films/ movies online 221-655, who access TV programmes online 309-804, who stream music online 205-877, who download music 110-622, who access newspaper articles online 506-728, who access e-books online 80-600
Q.13c Excluding any subscriptions, how often, if at all, do you buy or rent any of this content online?

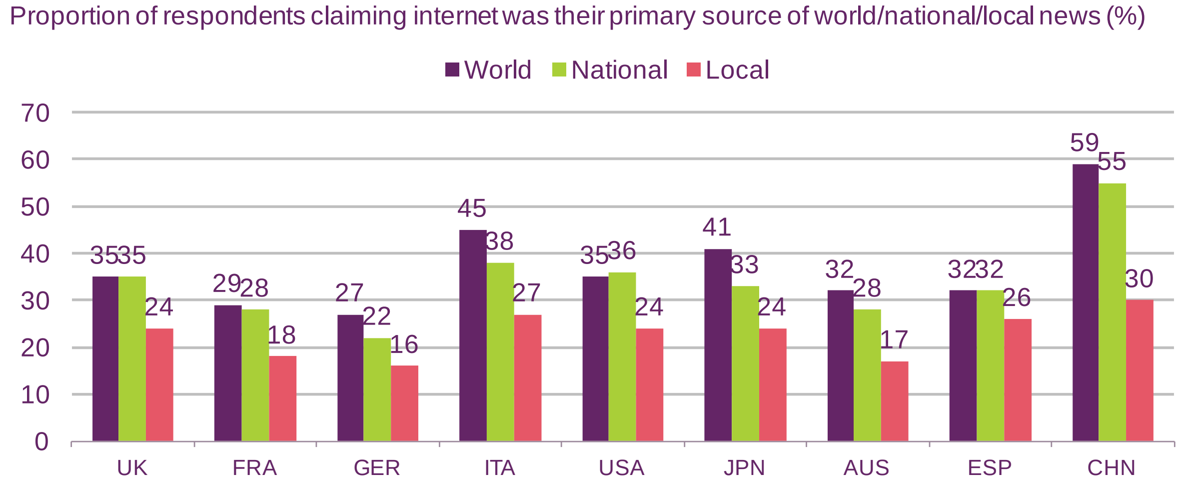
5.3.7 Online news

The internet is the primary source of national and world news for the majority of internet users in China.

Respondents in China were more likely than those in any of the other comparator countries analysed to claim that the internet was their primary source of any kind of news, with over half claiming that the internet was their primary source of both world (59%) and national (55%) news. In comparison, only a minority of respondents in the other comparator countries considered the internet a primary source of world, national and local news. The internet was least likely to be considered the main source of all types of news in Germany.

The internet was more likely to be considered a primary source of world news than of national news in Italy (45% and 38%) and Japan (41% and 33%), while the proportion of claims were more similar among the remaining countries. Respondents in all of the comparator countries were least likely to consider the internet their primary source of local news. We cover news sources across all media in Section 1.7, News Consumption: The International Context.

Figure 5.39 The internet as a primary source of news



Source: Ofcom consumer research September 2013.
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.
Q.11 Which, if any, is your main source for the following information?