

# 4. Internet and web-based content

Communications market report, August 2011

## 4.1 Key market developments in internet and web-based content



## Figure 4.1

### UK internet and web-based content market: key statistics

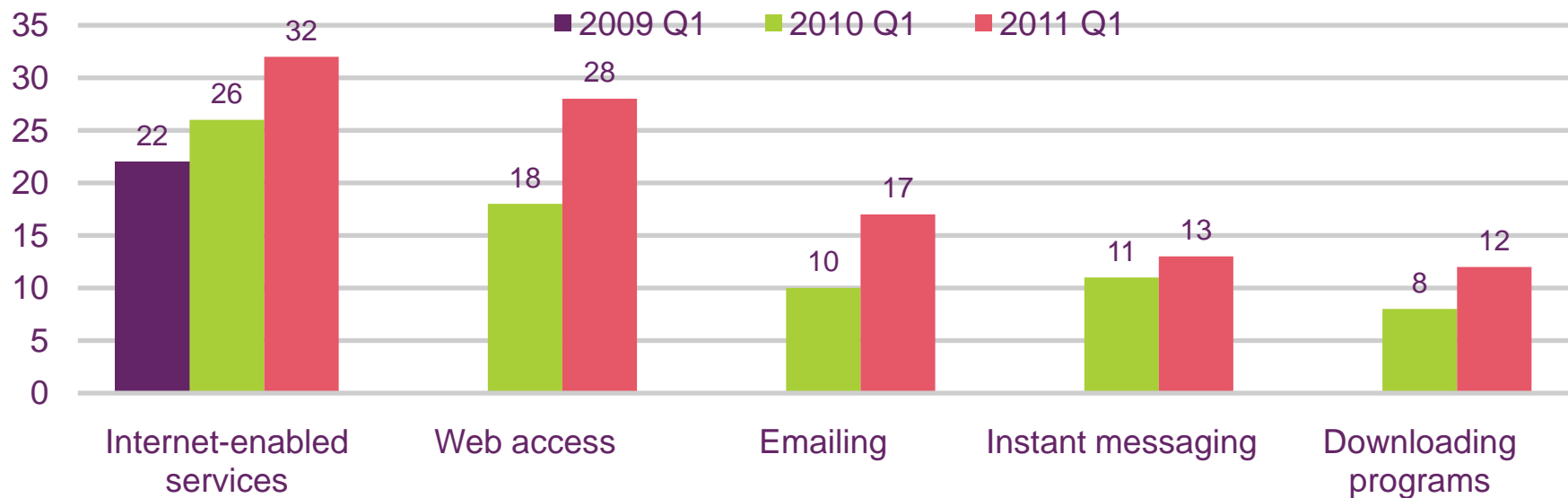
UK internet & web-based content market	2006	2007	2008	2009	2010	2011
<sup>1</sup> PC / laptop take-up (%)	67	71	72	74	76	78
<sup>1</sup> Internet take-up (%)	60	64	67	70	73	77
<sup>1</sup> Total broadband take-up (%)	41	52	58	68	71	74
<sup>1</sup> Fixed broadband take-up (%)	n/a	n/a	n/a	65	65	67
<sup>1</sup> Mobile broadband take-up (%)	n/a	n/a	n/a	12	15	17
<sup>1</sup> Internet on mobile phone take-up (%)	n/a	n/a	n/a	20	22	28
<sup>1</sup> Social networking on internet take-up (%)	n/a	n/a	20	30	40	46
<sup>2</sup> Internet advertising expenditure	£2.0bn	£2.8bn	£3.4bn	£3.5bn	£4.1bn	n/a
<sup>3</sup> Mobile advertising revenue	n/a	n/a	n/a	£37.6m	£83.0m	n/a

Sources: <sup>1</sup>Ofcom consumer research (Q1 each year), <sup>2</sup>IABUK /PwC, <sup>3</sup>IAB

## Figure 4.2

### Use of mobile data services

Proportion of mobile users using service (%)



QD9A: Which if any of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom technology tracker, Q1 2011

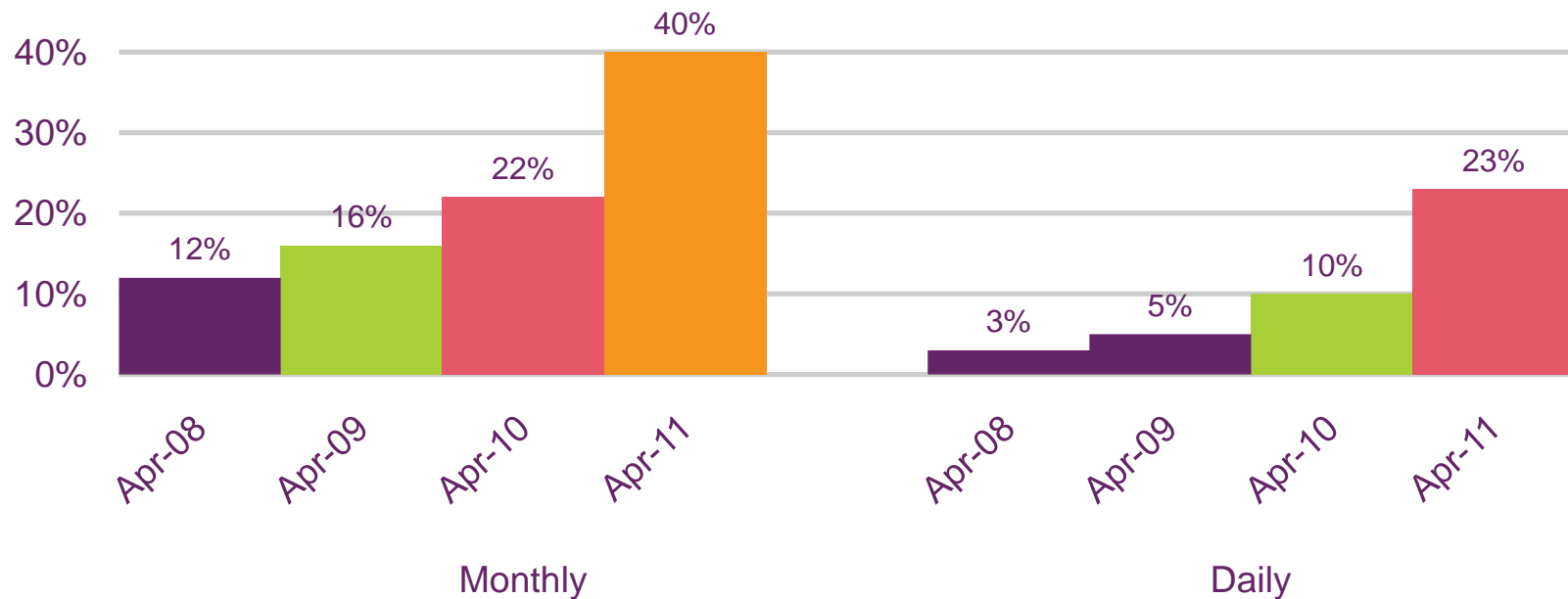
Base: All mobile users aged 16+ (n=3091);

Note: 'Internet-enabled services' data shows the proportion of adults who use a mobile phone for any of the following activities: instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

## Figure 4.3

### Browsing news and information on mobile phones

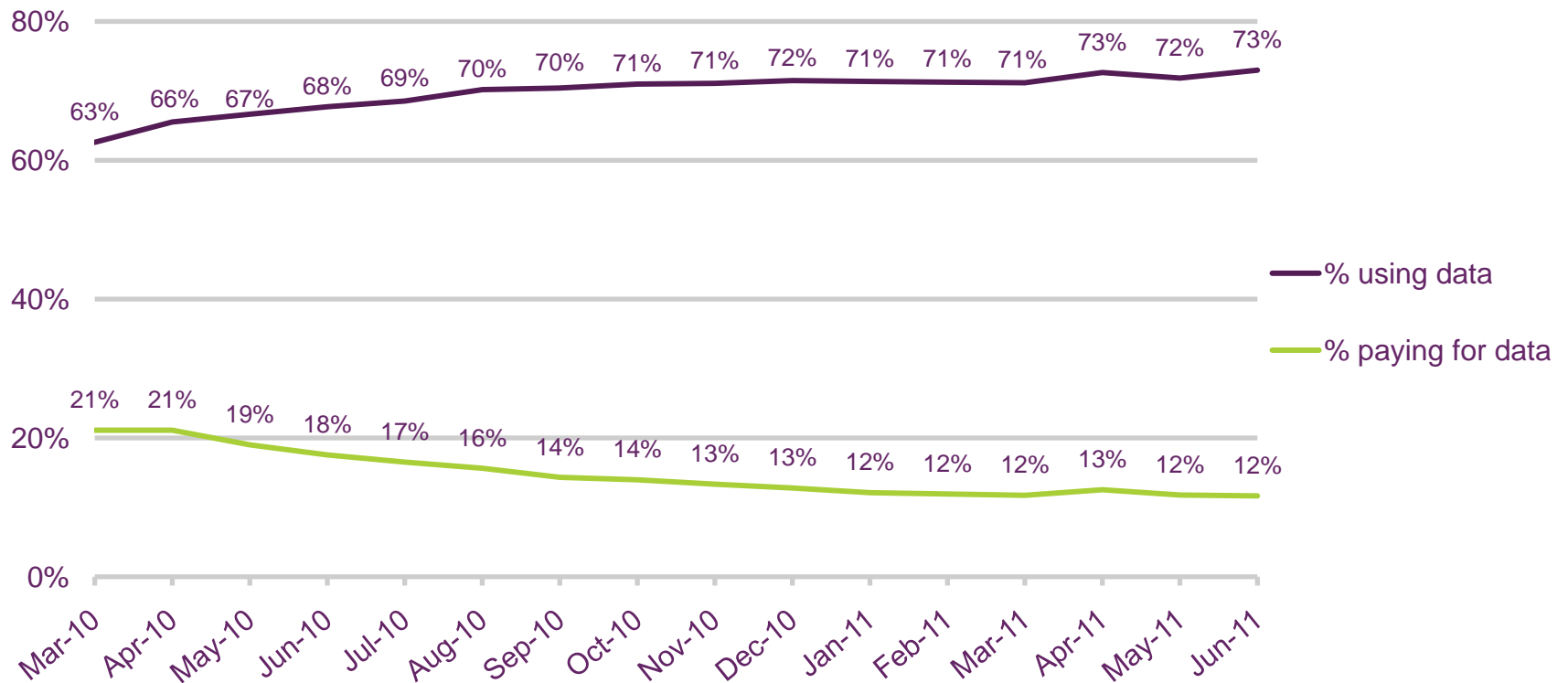
Proportion of mobile users browsing news and information



Source: Enders Analysis/TNS-RI survey, April 2011

# Figure 4.4

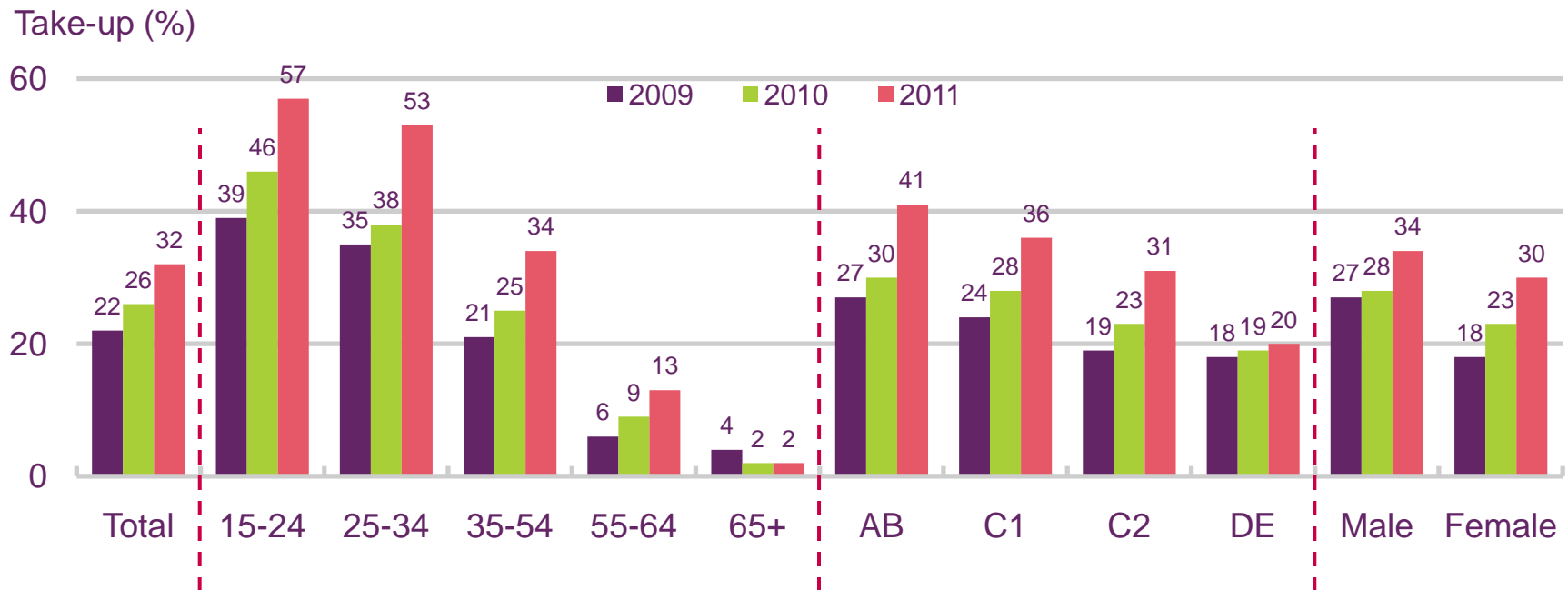
## Proportion of pay-monthly customers using data and paying for it outside a bundle



Source: Bill Monitor

## Figure 4.5

### Use of internet on mobile phones by demographic



QD28A: Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

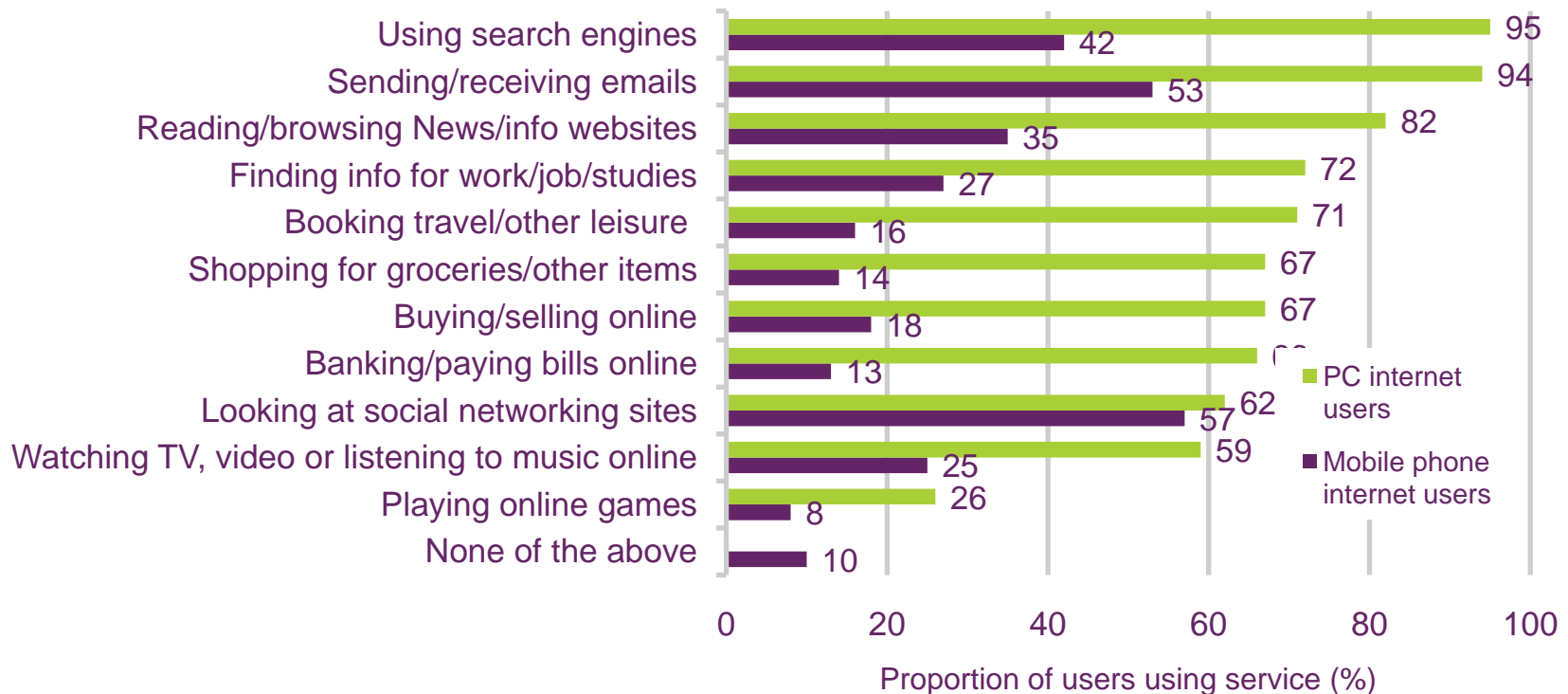
Source: Ofcom technology tracker, Q1 2011

Base: All adults 16+ (n = 3474 UK, 460 16-24, 540 25-34, 1204 35-54, 535 55-64, 735 65+, 784 AB, 1014 C1, 701 C2, 975 DE, 1679 male, 1795 female)

Note: Data shows the proportion of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites.

# Figure 4.6

## Comparative use of internet by PC and mobile users



Q12. Which of the following type of activities do you use the internet for?

Base: All respondents (1022)

Q13. And which of these do you ever use the internet on your mobile phone for?

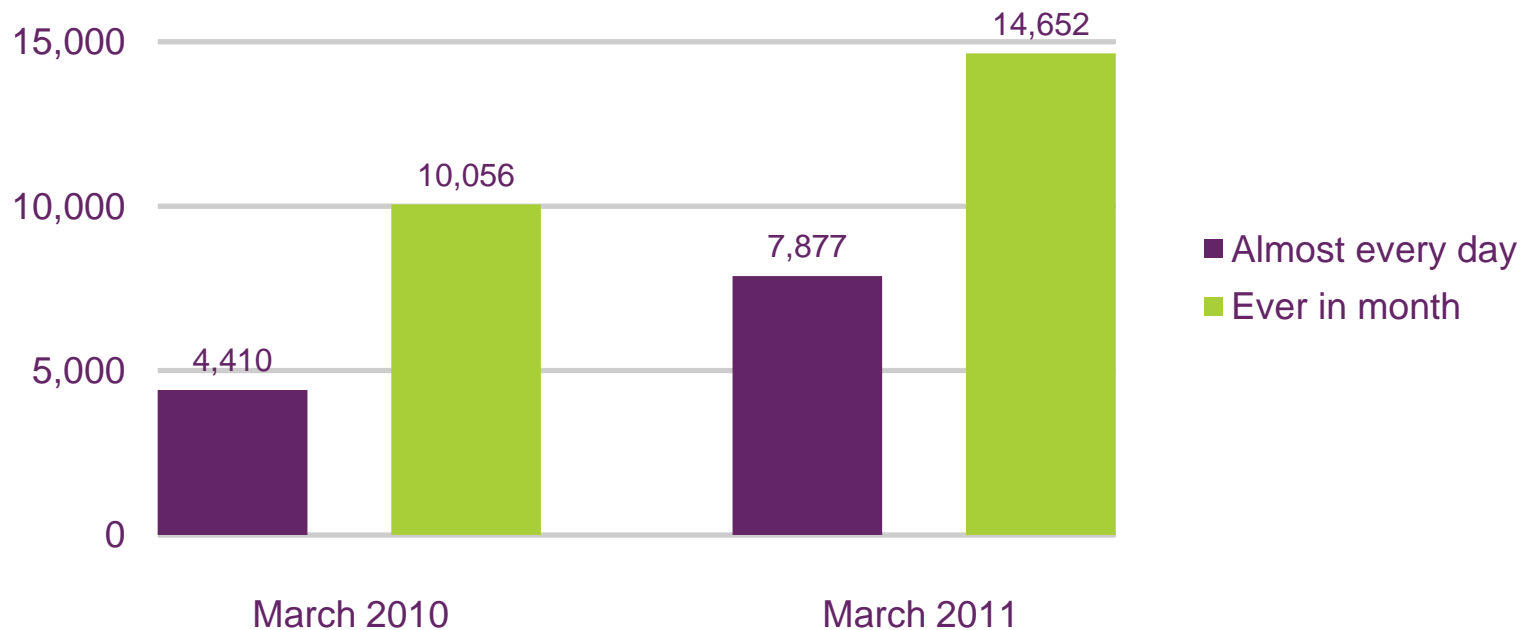
Base: Those who access the internet via mobile phone (212)

Source: Monetisation of data research, conducted on behalf of the Communications Consumer Panel by Accent, fieldwork in February 2011



## Figure 4.7

### Unique UK mobile phones accessing social networking services

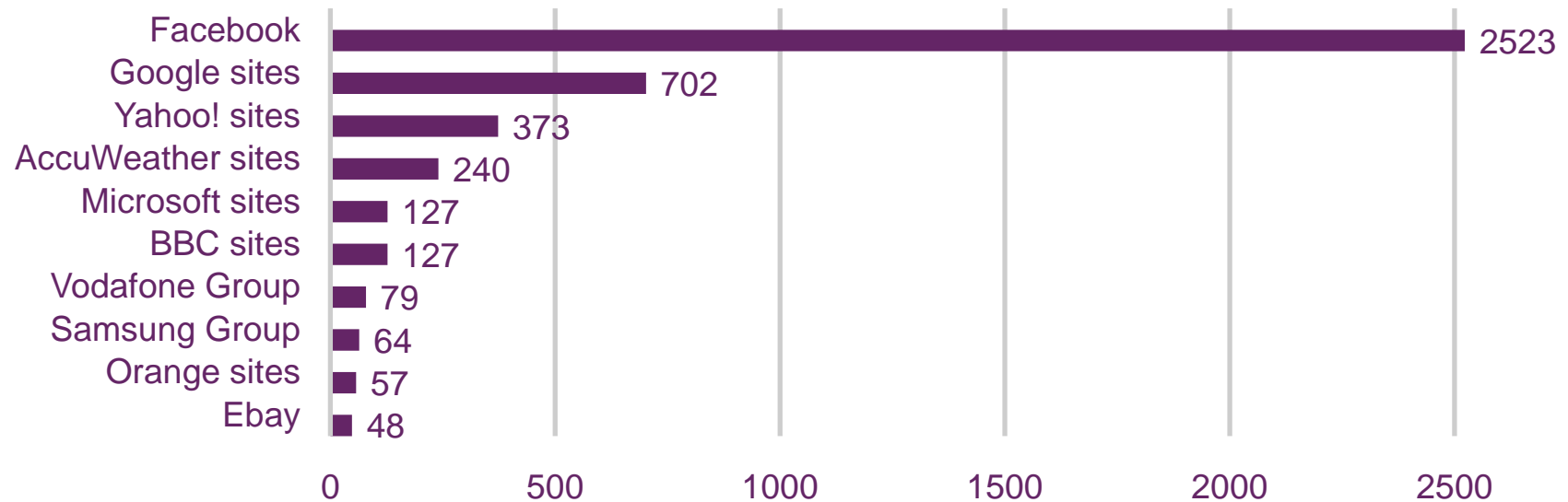


Source: comScore mobiLens, three month average ending Mar-10 vs Mar-11,  
<http://www.comscoredatamine.com/2011/05/mobile-social-media-usage-up-80-percent-in-the-uk/>

## Figure 4.8

### Top 10 UK mobile internet sites, December 2010

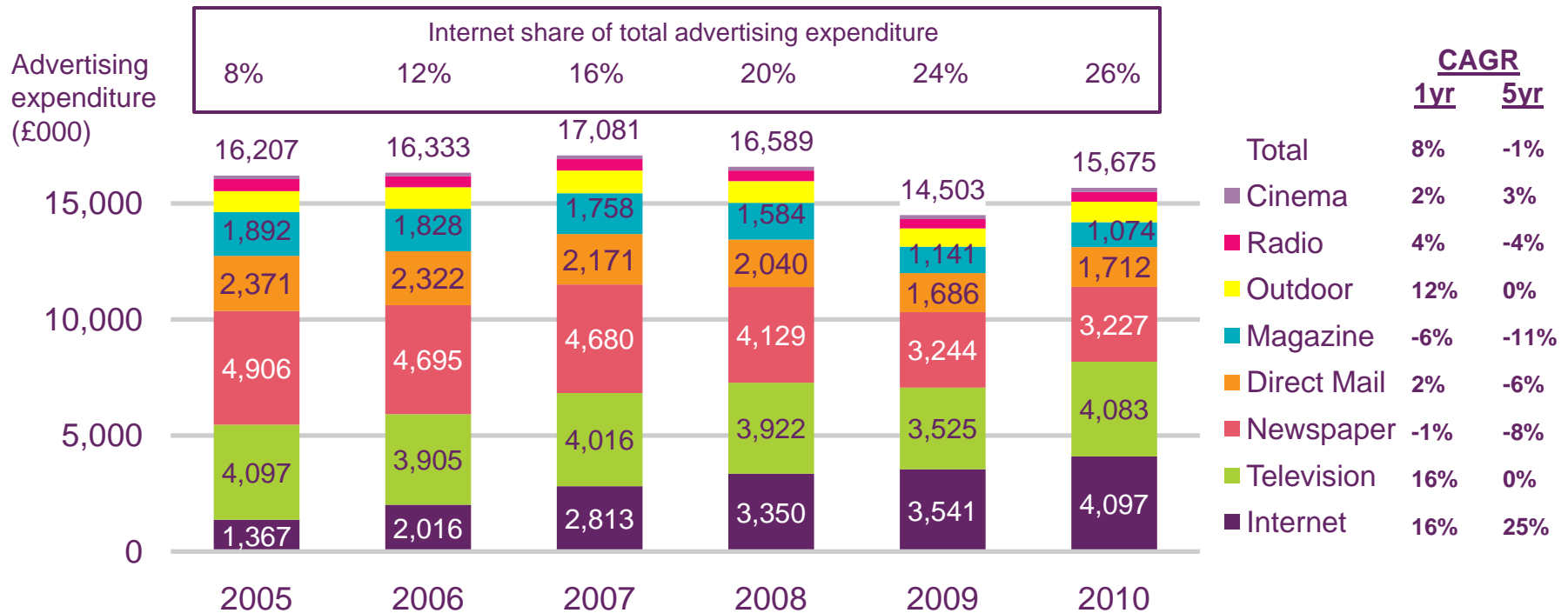
Total time spent (million minutes)



Source: ComScore, Mobile Year in Review 2010 (February 2011),  
[http://www.comscore.com/Press\\_Events/Presentations\\_Whitepapers/2011/2010\\_Mobile\\_Year\\_in\\_Review](http://www.comscore.com/Press_Events/Presentations_Whitepapers/2011/2010_Mobile_Year_in_Review)

# Figure 4.9

## UK advertising expenditure, by sector



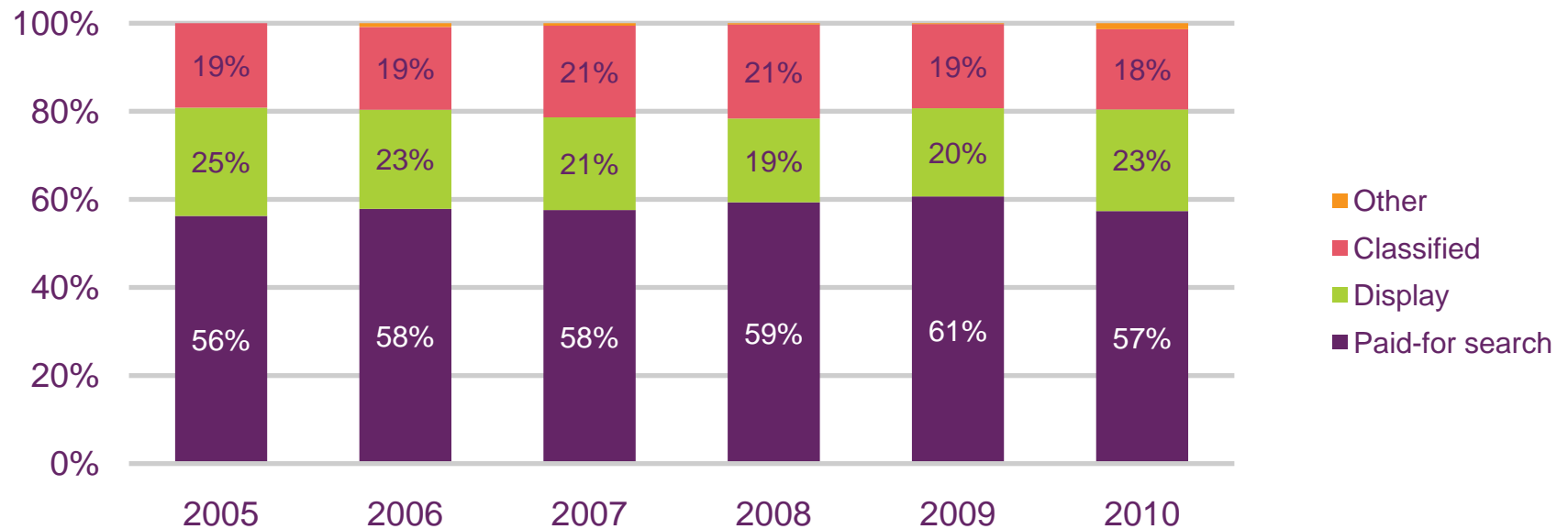
Source: AA/Warc Expenditure Report

Notes: All figures are nominal; CAGR = compound annual growth

# Figure 4.10

## Distribution of UK internet advertising expenditure by category

Expenditure share (%)

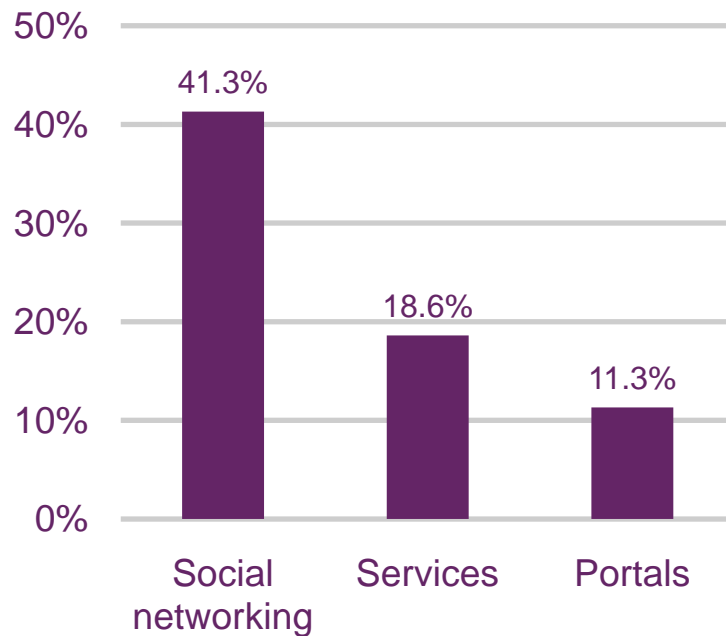


Source: IABUK/PwC

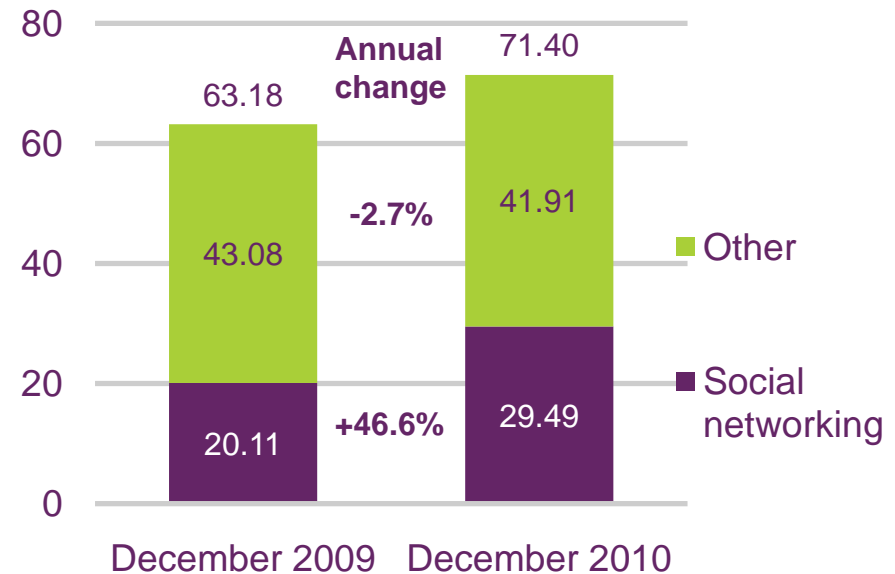
# Figure 4.11

## UK internet display advertising

Share of total display ads, December 2010



Total display ad impressions (billions)

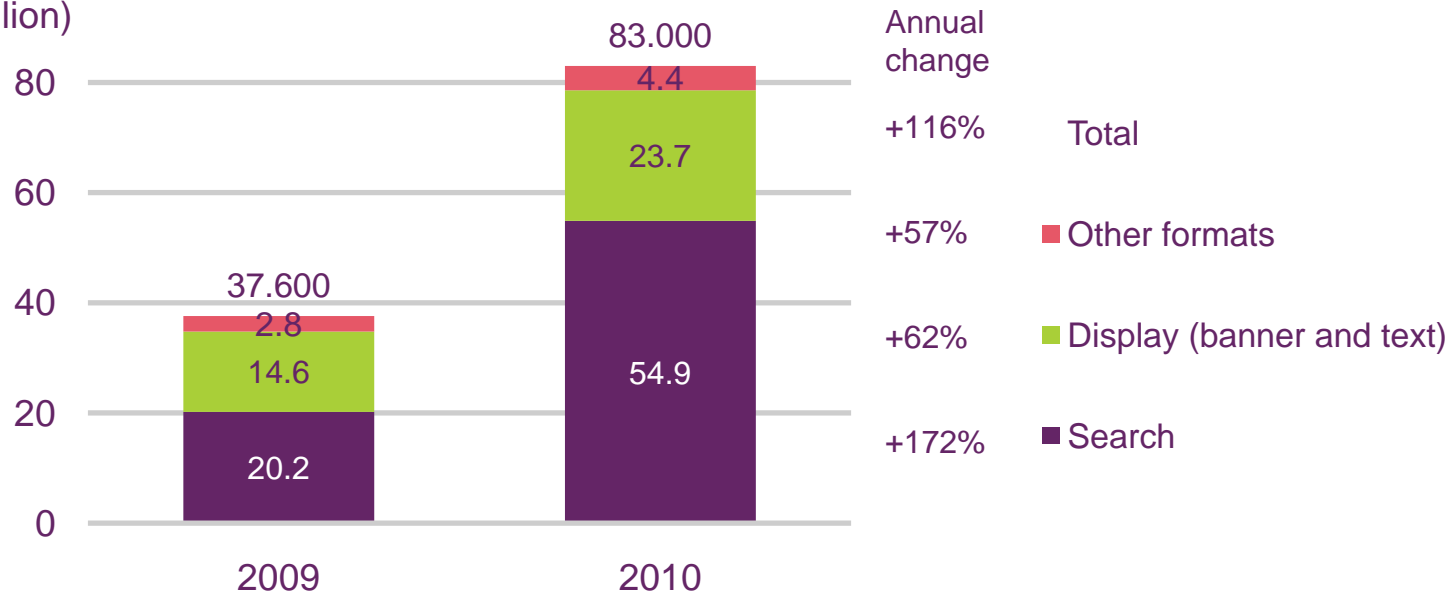


Source: comScore Ad matrix, cited in The 2010 Europe Digital year in Review, [http://www.comscore.com/Press\\_Events/Presentations\\_Whitepapers/2011/2010\\_Europe\\_Digital\\_Year\\_in\\_Review](http://www.comscore.com/Press_Events/Presentations_Whitepapers/2011/2010_Europe_Digital_Year_in_Review)

# Figure 4.12

## Mobile advertising spend

Mobile phone advertising spend (£million)

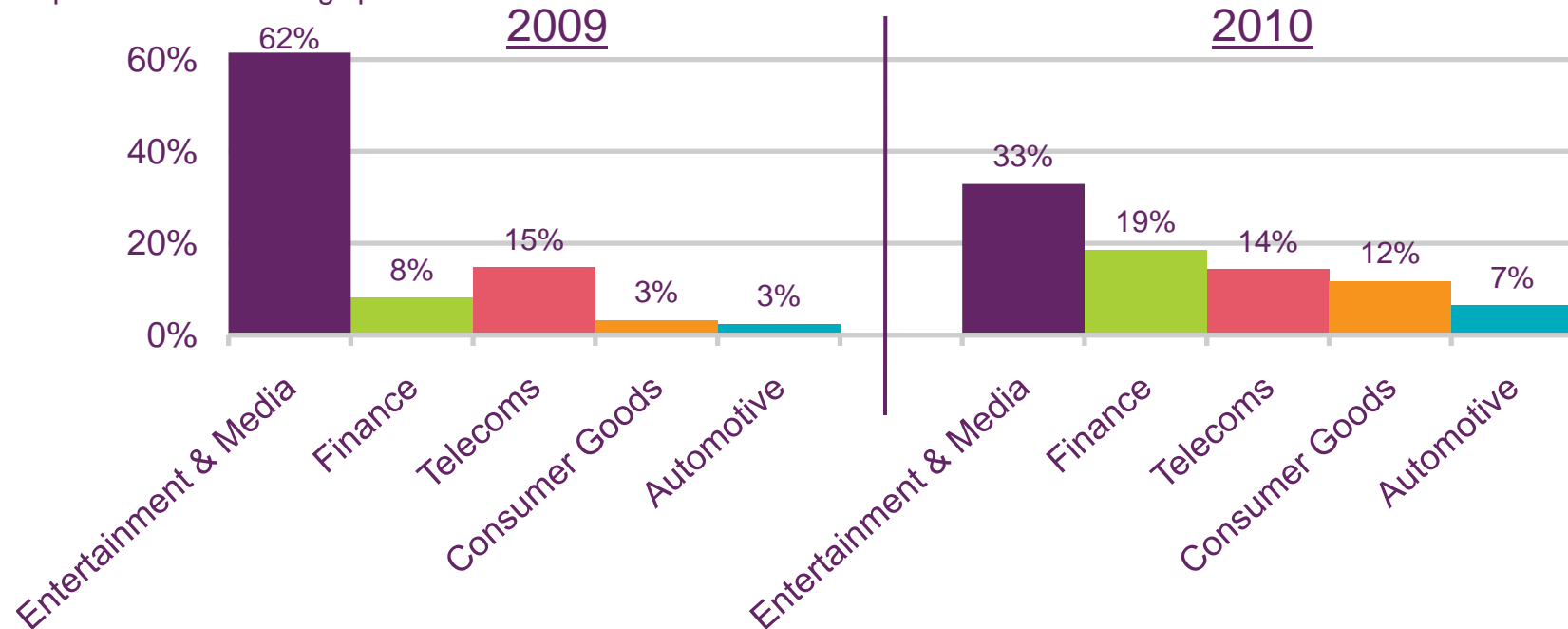


Source: IAB, referenced at [http://www.digitalstrategyconsulting.com/intelligence/2011/03/smartphones\\_helped\\_double\\_uk\\_m.php#](http://www.digitalstrategyconsulting.com/intelligence/2011/03/smartphones_helped_double_uk_m.php#)

# Figure 4.13

## Top 5 mobile advertising categories, 2009 and 2010

Proportion of advertising spend

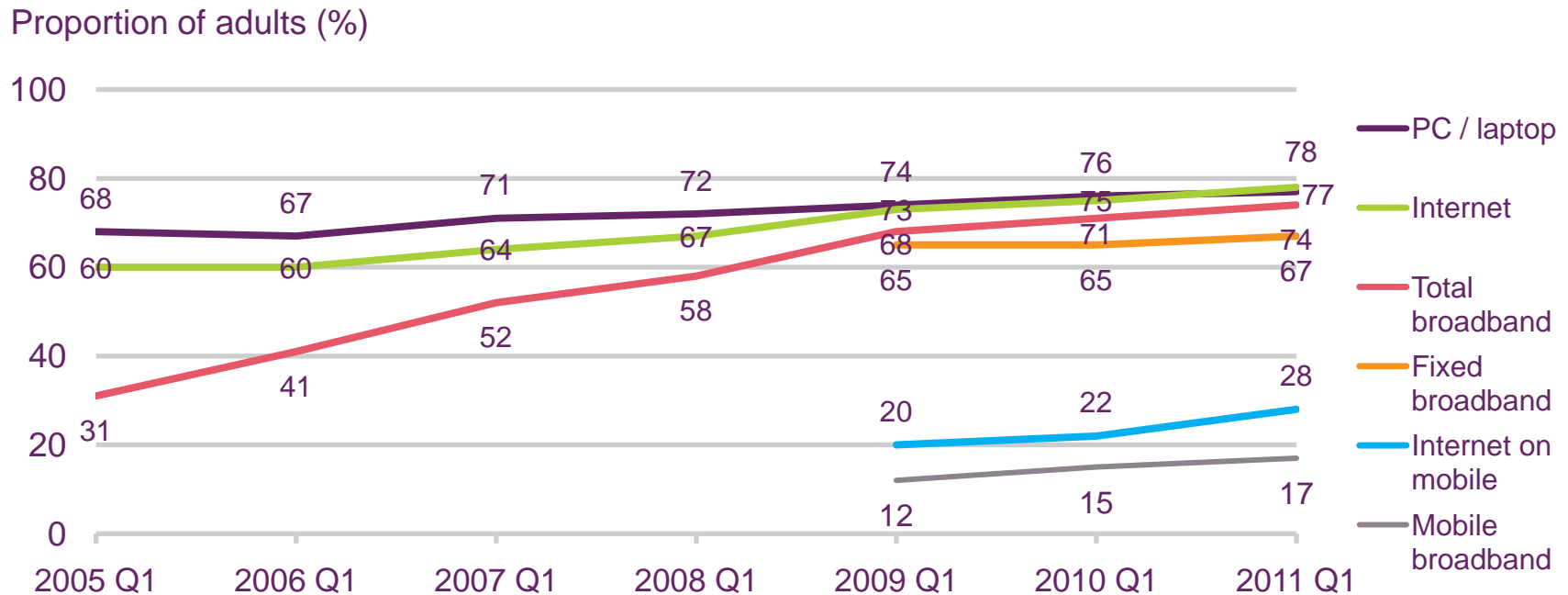


Source: IAB, referenced at

[http://www.digitalstrategyconsulting.com/intelligence/2011/03/smartphones\\_helped\\_double\\_uk\\_m.php#](http://www.digitalstrategyconsulting.com/intelligence/2011/03/smartphones_helped_double_uk_m.php#)

# Figure 4.14

## Household PC and internet take-up, 2005-2010



QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom technology tracker, Q1 2011.

Base: All adults aged 16+ (n=3474)

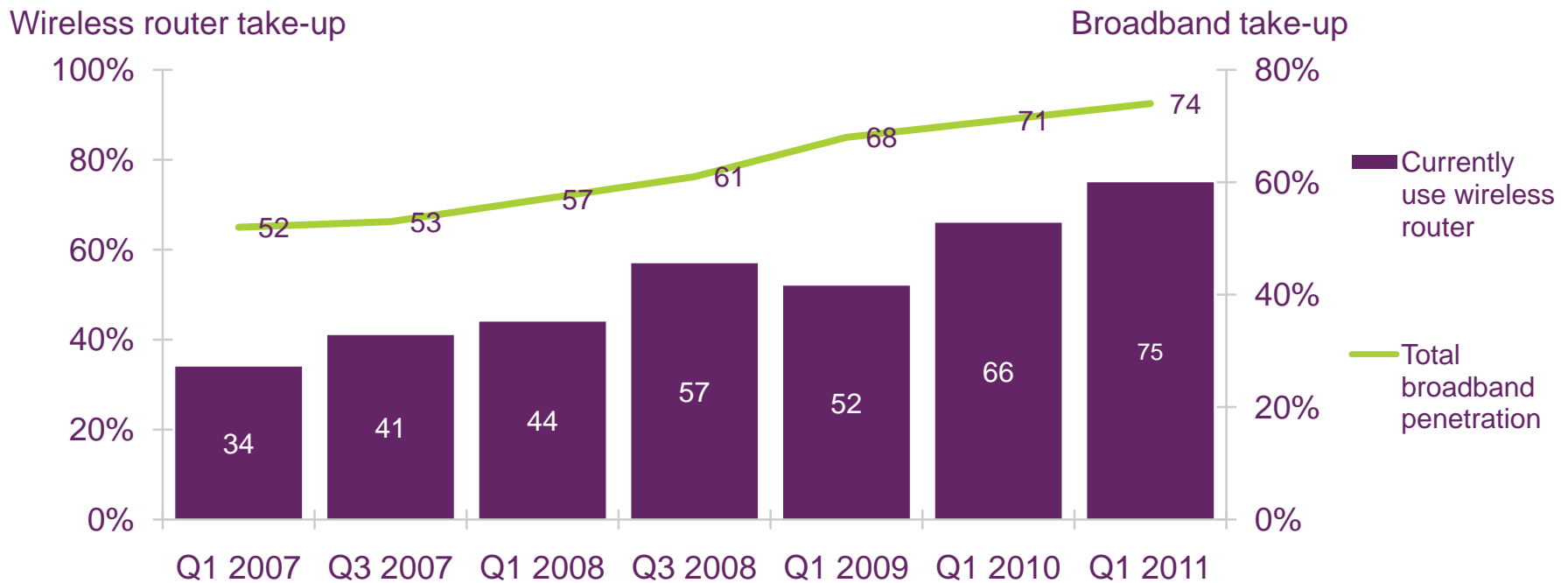
Note 1: "Internet on mobile" is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites.

Note 2: From Q1 2009 the 'Internet' figure includes those who access the internet on mobile phones.



# Figure 4.15

## Use of wireless router vs. broadband take-up, 2007-2011



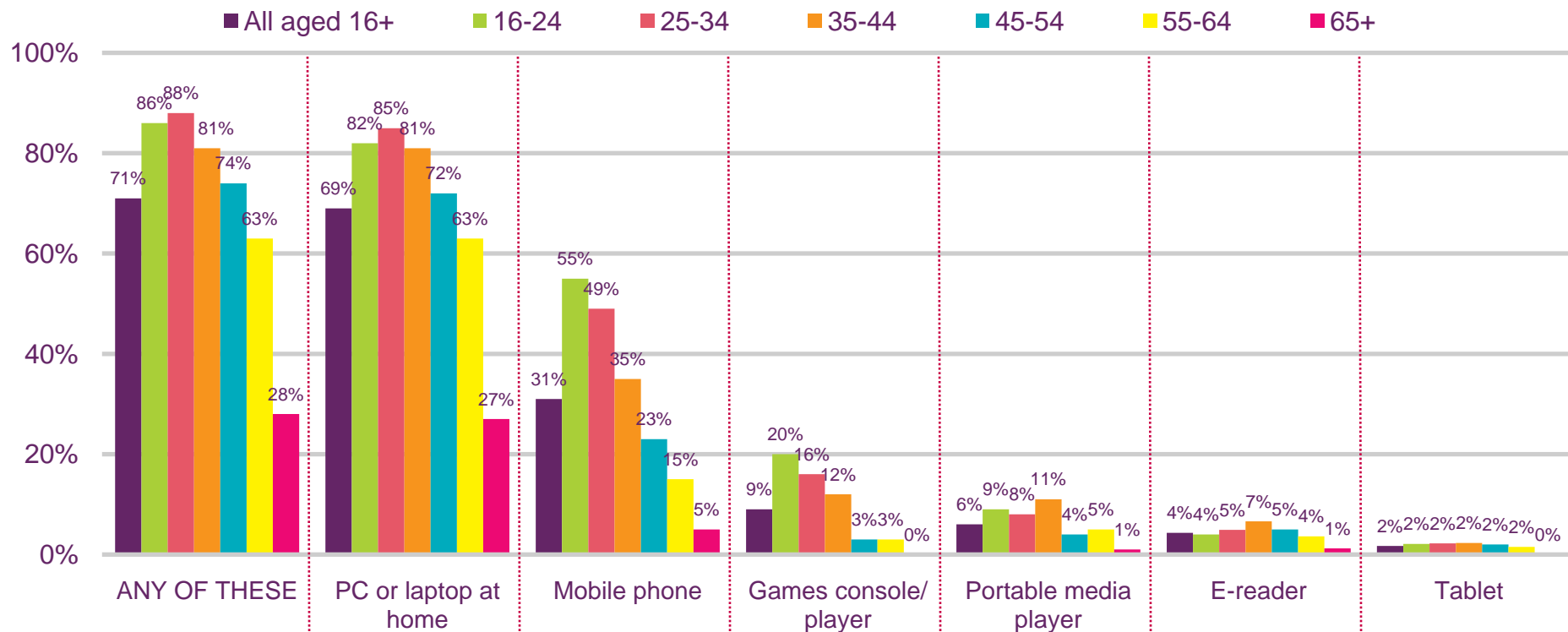
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ with a broadband connection at home (from 2009 this is based on fixed broadband connections only)

Note: Total broadband penetration (fixed and mobile) based on all adults aged 16+

# Figure 4.16

## Devices used to visit internet websites in 2010, by age



IN1/ IN2 – Do you or does anyone in your household have access to the internet at home through a laptop or computer? And do you personally use the internet at home?/ Do you own and use any of the items shown on this card to visit internet websites? (Prompted responses, single coded)

Base: All adults aged 16+ (2117 aged 16+, 295 aged 16-24, 328 aged 25-34, 409 aged 35-44, 314 aged 45-54, 336 aged 55-64, 434 aged 65+)

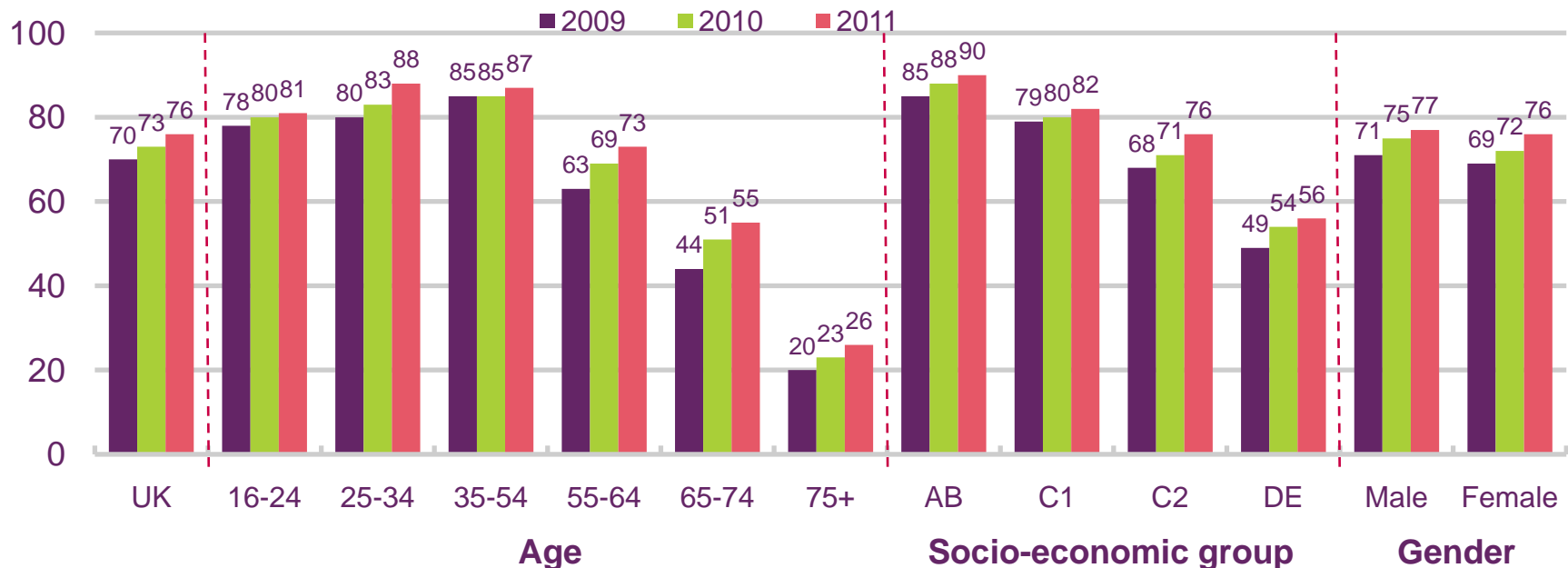
Significance testing shows any difference between any age group and all adults aged 16+

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Figure 4.17

## Home internet access, by age, socio-economic group and gender

Home internet access (%)



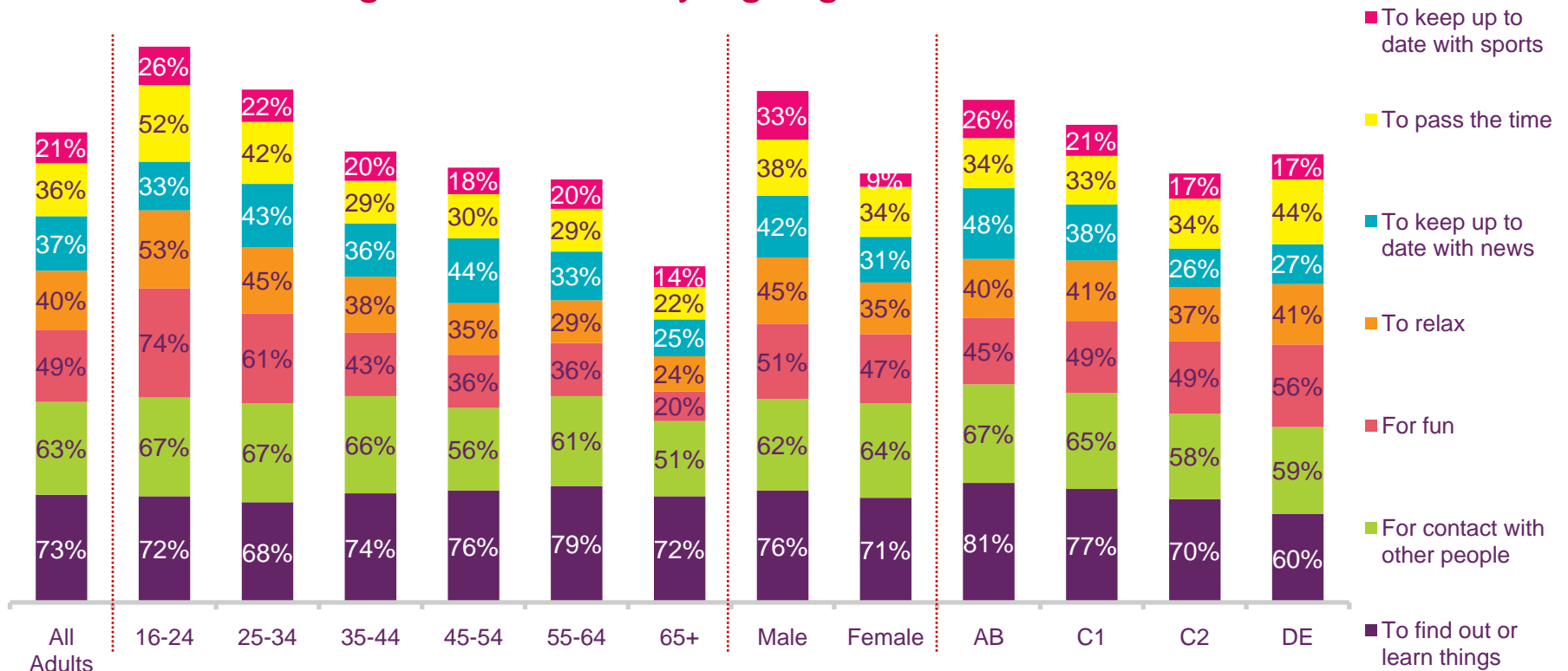
QE2: Do you or does anyone in your household have access to the internet/ Worldwide Web at home?

Source: Ofcom technology tracker, Q1 2011.

Base: all adults 16+ (n = 3474 UK, 460 16-24, 540 25-34, 1204 35-54, 535 55-64, 407 65-74, 328 75+, 784 AB, 1014 C1, 701 C2, 975 DE, 1679 male, 1795 female)

# Figure 4.18

## Reasons for using the internet, by age, gender and SEG



IN42 – Which, if any of these are reasons why you use the internet? (prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1489 aged 16+ in 2010, 271 aged 16-24, 287 aged 25-34, 338 aged 35-44, 245 aged 45-54, 214 aged 55-64, 134 aged 65+, 752 male, 737 female, 433 AB, 478 C1, 278 C2, 300 DE)

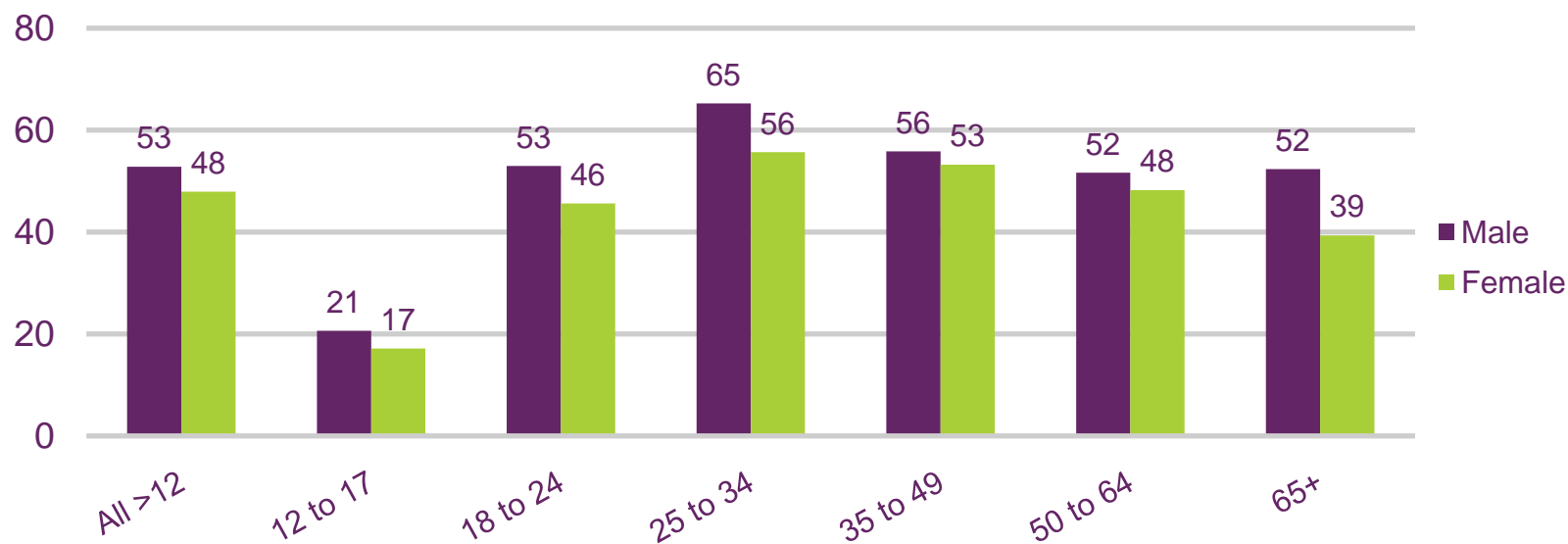
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010



# Figure 4.19

## Average time spent on the internet by age and gender

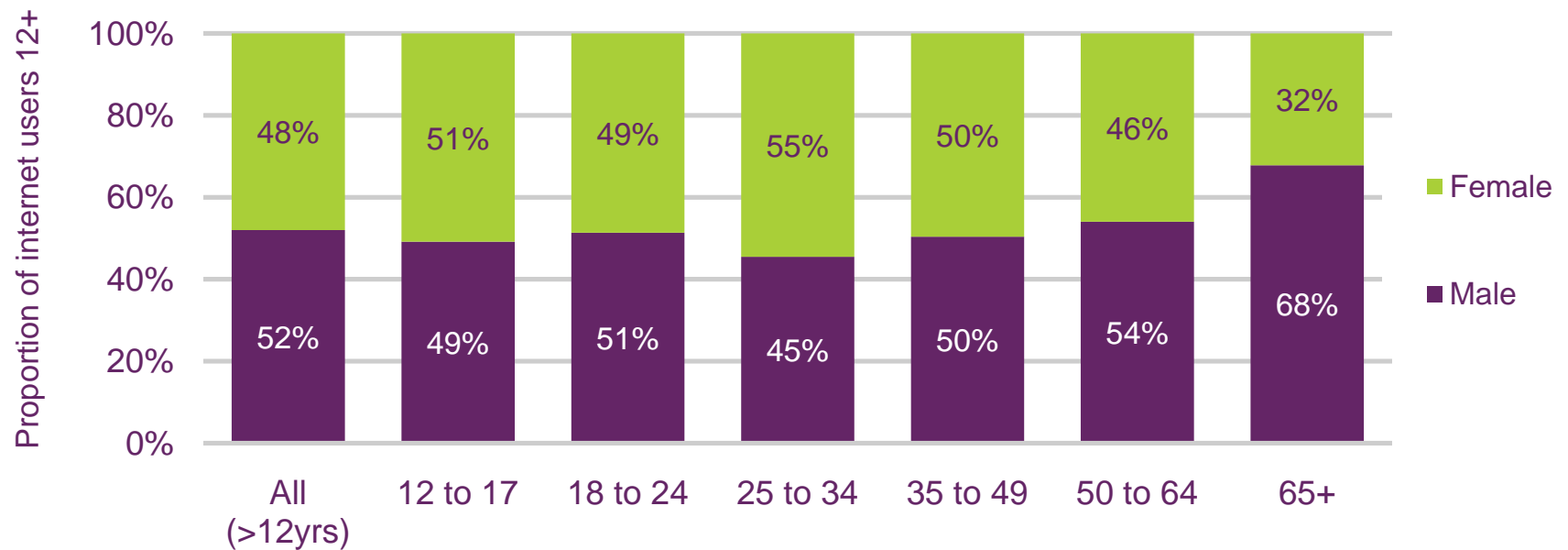
Average monthly hours online per internet user



Source: UKOM/Nielsen, April 2011

## Figure 4.20

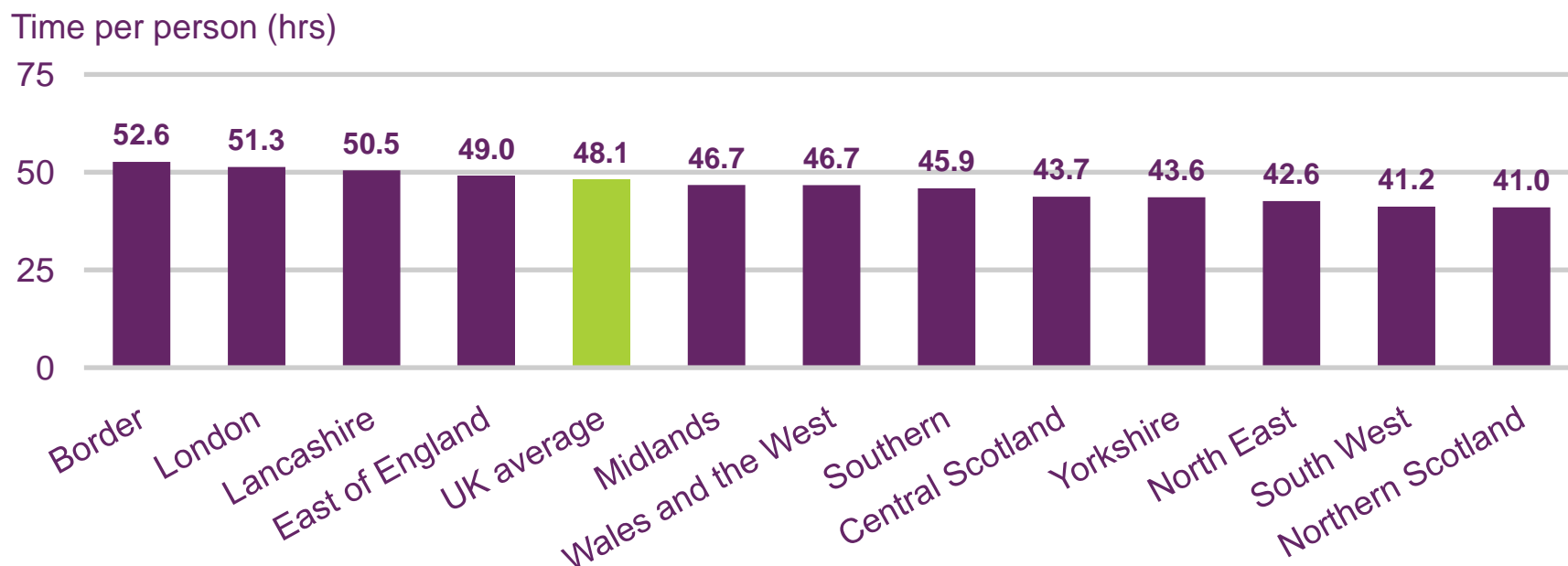
### Internet usage by gender (total time spent online)



Source: UKOM/Nielsen, April 2011

## Figure 4.21

### Monthly internet-enabled PC time per user, by region



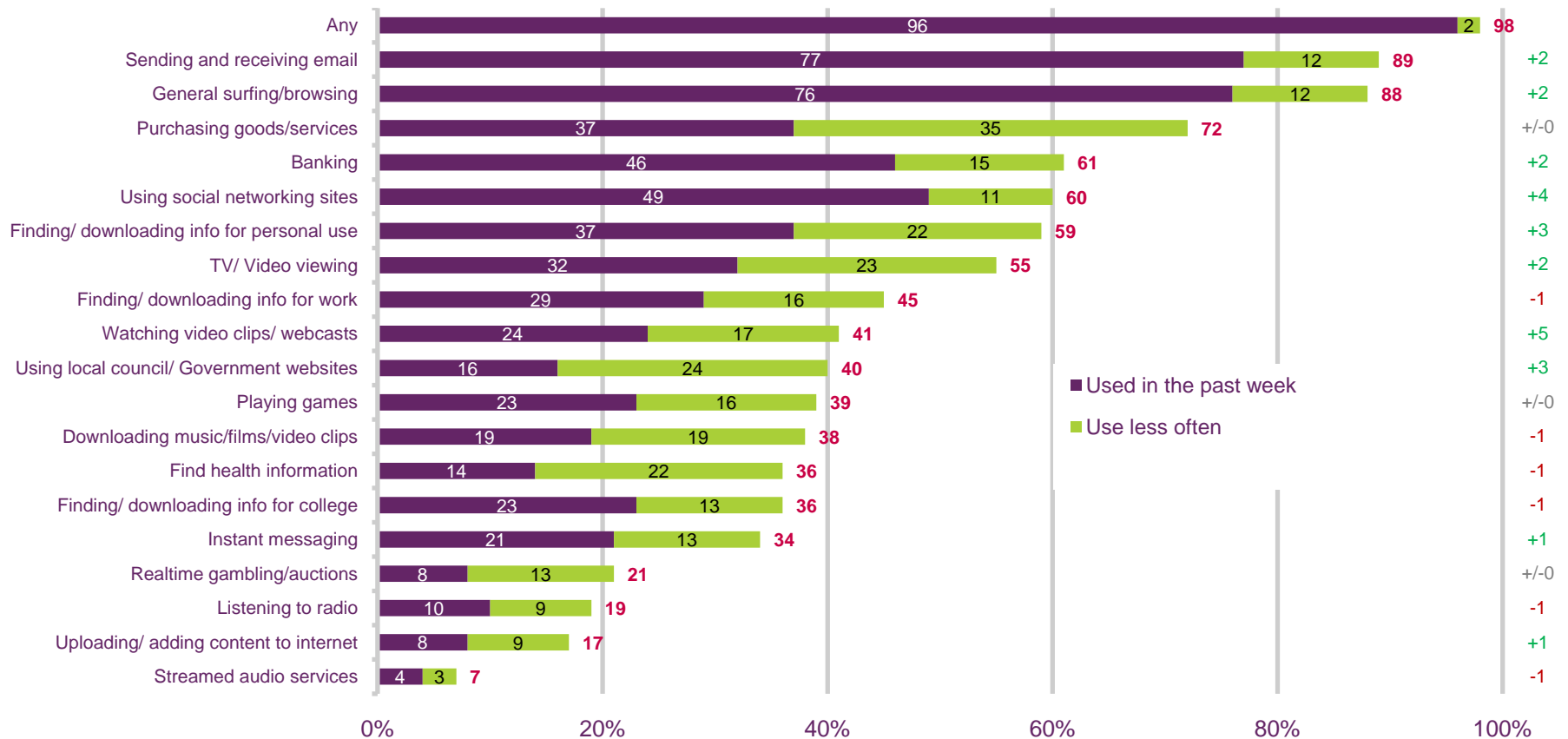
Source: UKOM/Nielsen, home and work panel, applications included. Month of April 2011. Regions based on ISBA regions.

Note: active online universe = number of users aged 2+ who use an internet-enabled computer.

# Figure 4.22

## Claimed use of the internet for selected activities

Increase  
Since Q1 2010  
(%-age points)



QE5. Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom research, Quarter 1 2011

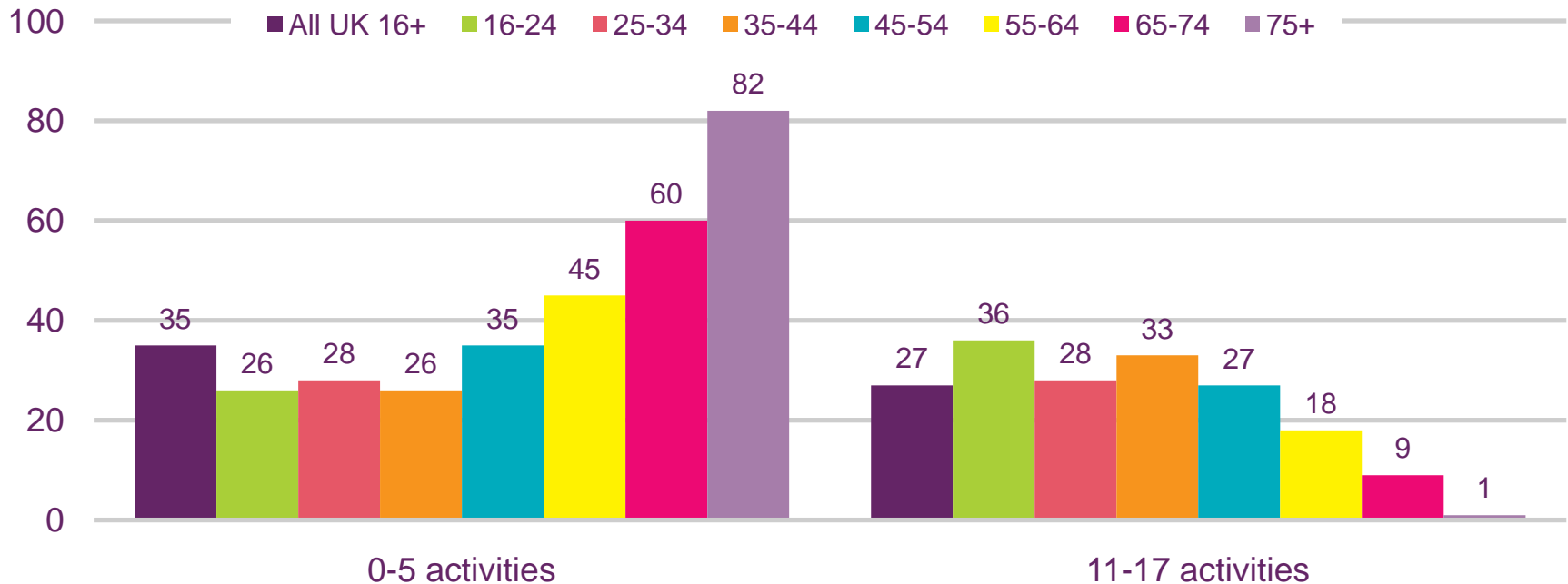
Base: Adults aged 16+ with a broadband connection at home (n= 2481 UK)



# Figure 4.23

## Breadth of internet use (number of internet activities undertaken)

Proportion of internet users (%)



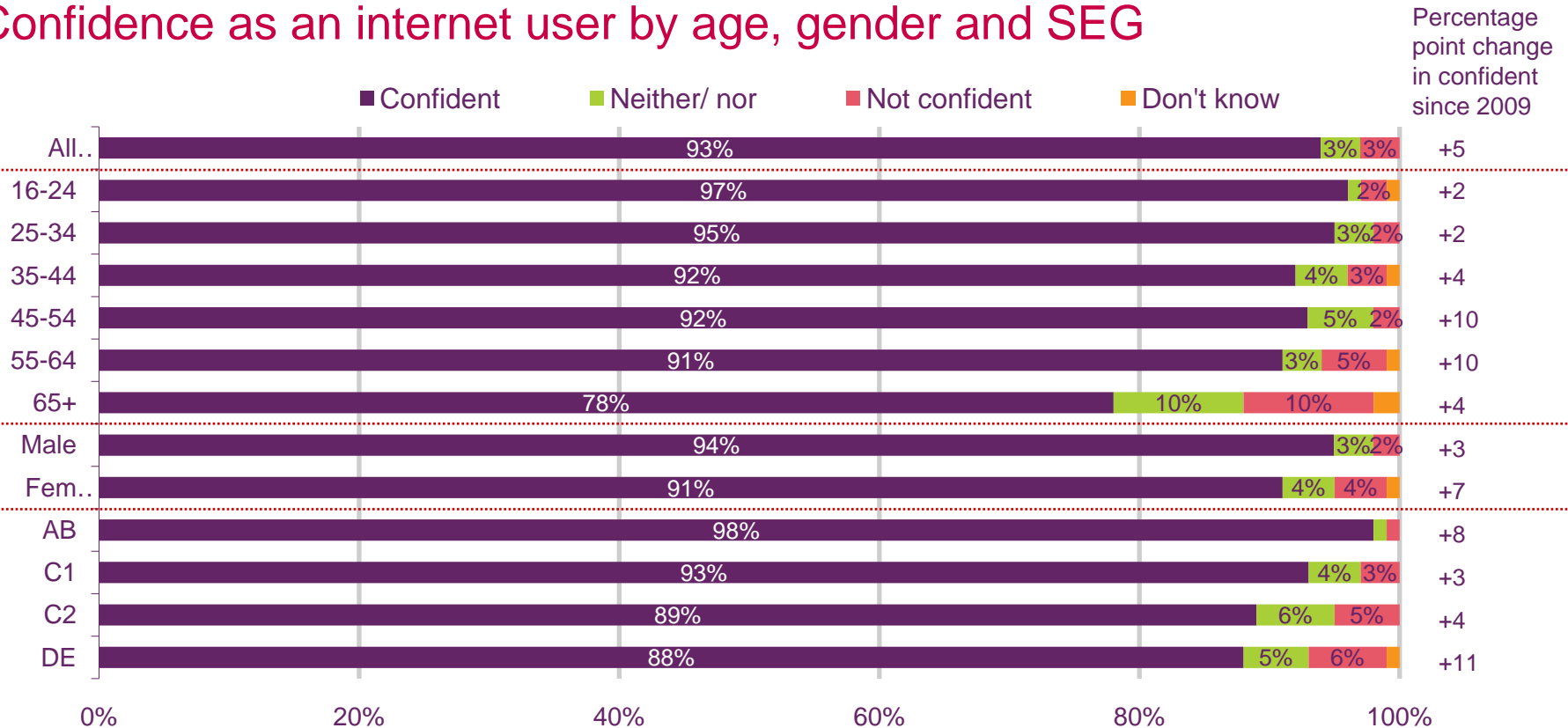
Q10A: Which, if any, of these do you or members of your household use the internet for whilst at home?

Source: Ofcom Technology Tracker digital participation research, Q1 2011

Base: All home internet users (n=2534)

# Figure 4.24

## Confidence as an internet user by age, gender and SEG



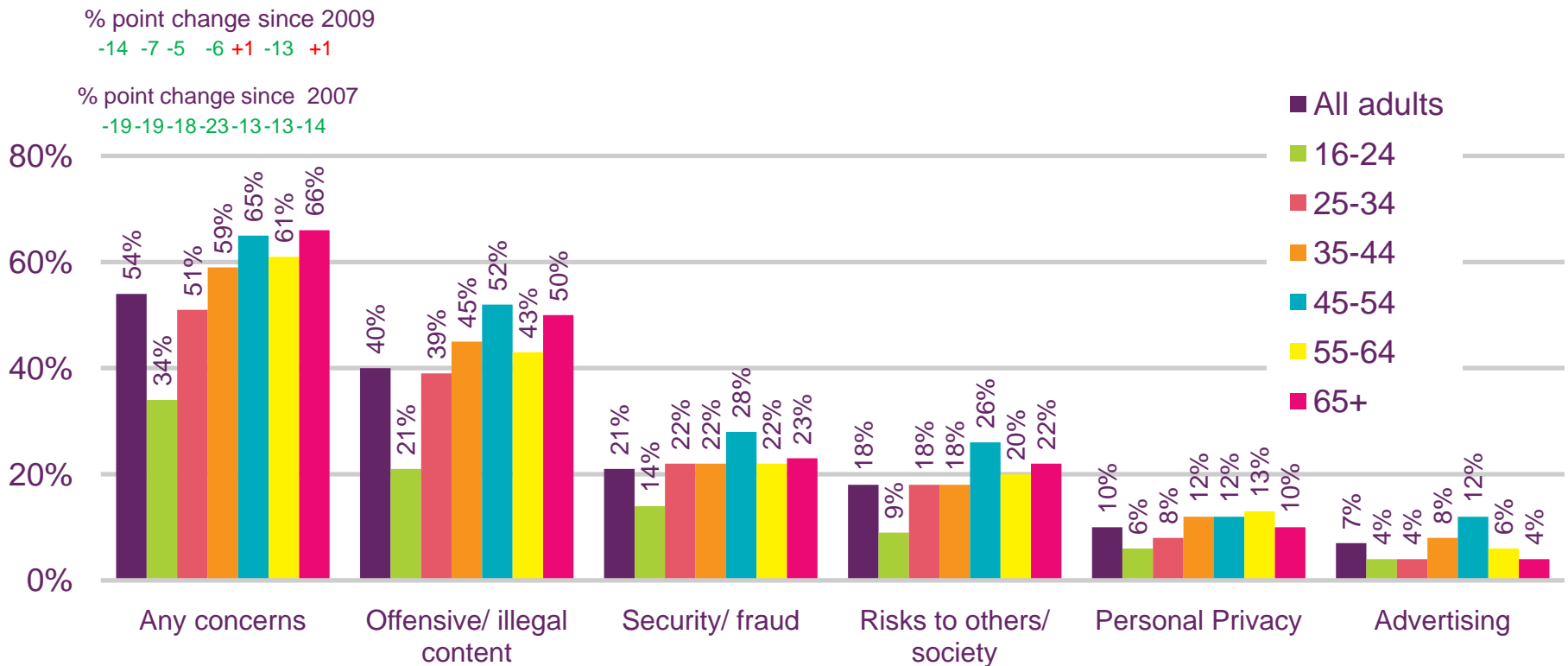
IN10D – Overall then, how confident are you as an internet user? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1489 aged 16+ in 2010, 271 aged 16-24, 287 aged 25-34, 338 aged 35-44, 245 aged 45-54, 214 aged 55-64, 134 aged 65+, 752 male, 737 female, 433 AB, 478 C1, 278 C2, 300 DE)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Figure 4.25

## Concerns about the internet among users, by age



IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1489 aged 16+, 271 aged 16-24, 287 aged 25-34, 338 aged 35-44, 245 aged 45-54, 214 aged 55-64, 134 aged 65+)

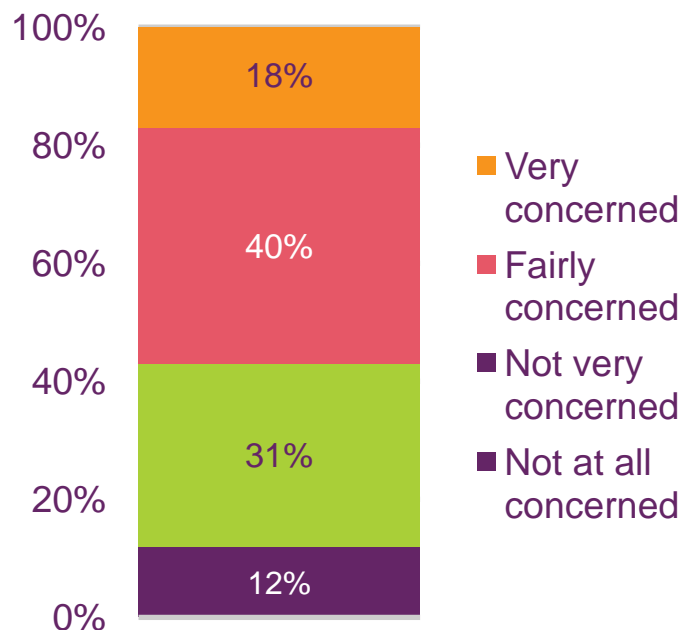
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Figure 4.26

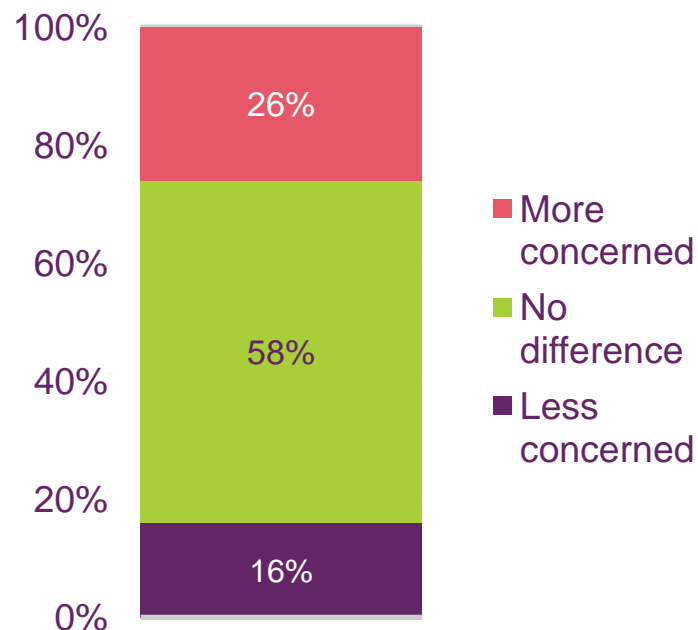
## Concerns about privacy online



How concerned are you about your privacy on line?



Are you more or less concerned about privacy issues using a mobile phone compared to a PC?



Q10. Generally speaking, when you use the internet, how concerned are you about your privacy on line?

Base: All respondents (1022)

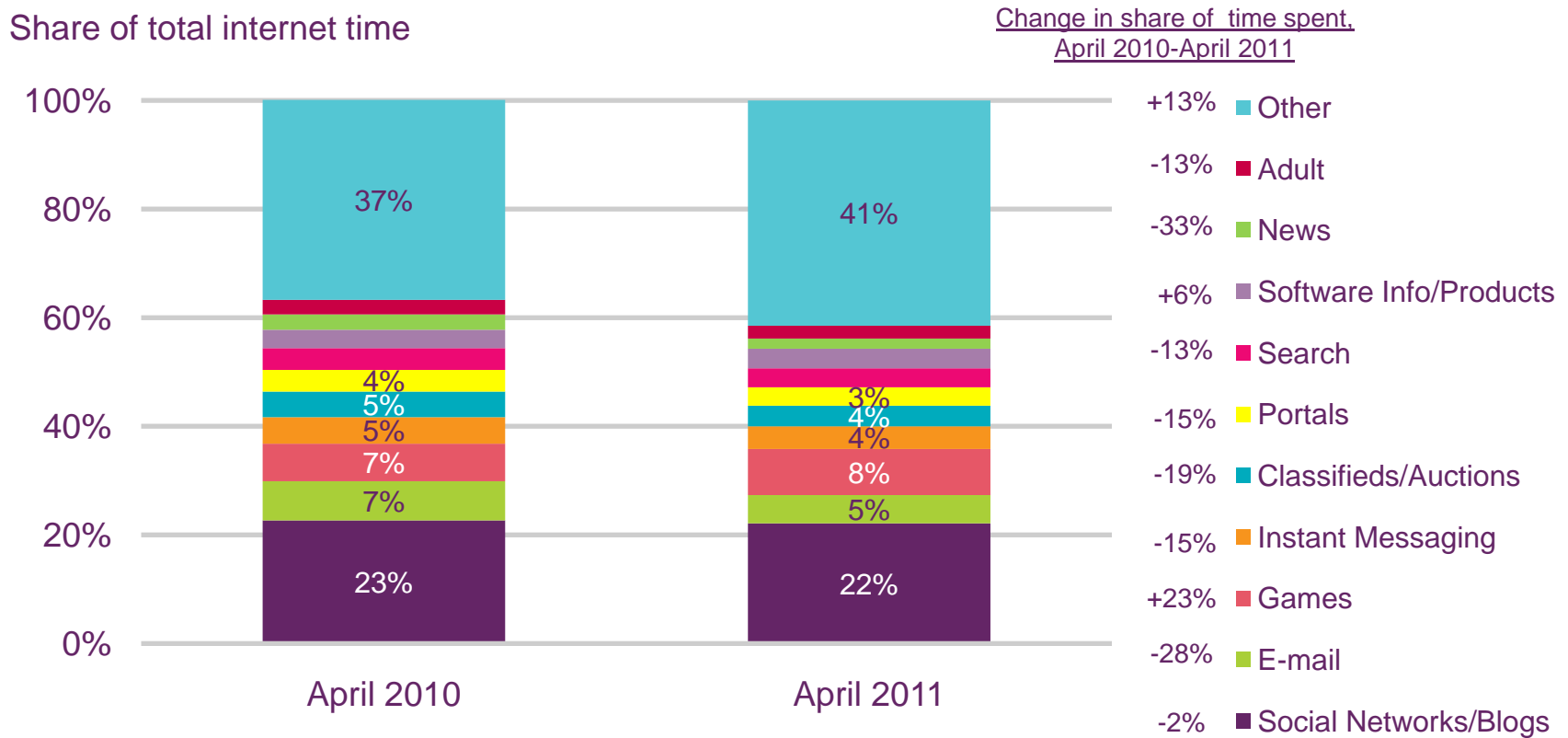
Q11. Are you more or less concerned about privacy issues when you use your mobile phone to access the internet compared to when you use a PC, laptop or tablet?

Base: Those who access the internet via mobile phone (212)

Source: Monetisation of data research, conducted on behalf of the Communications Consumer Panel by Accent, fieldwork in February 2011

# Figure 4.27

## UK internet sectors' share of total PC internet time

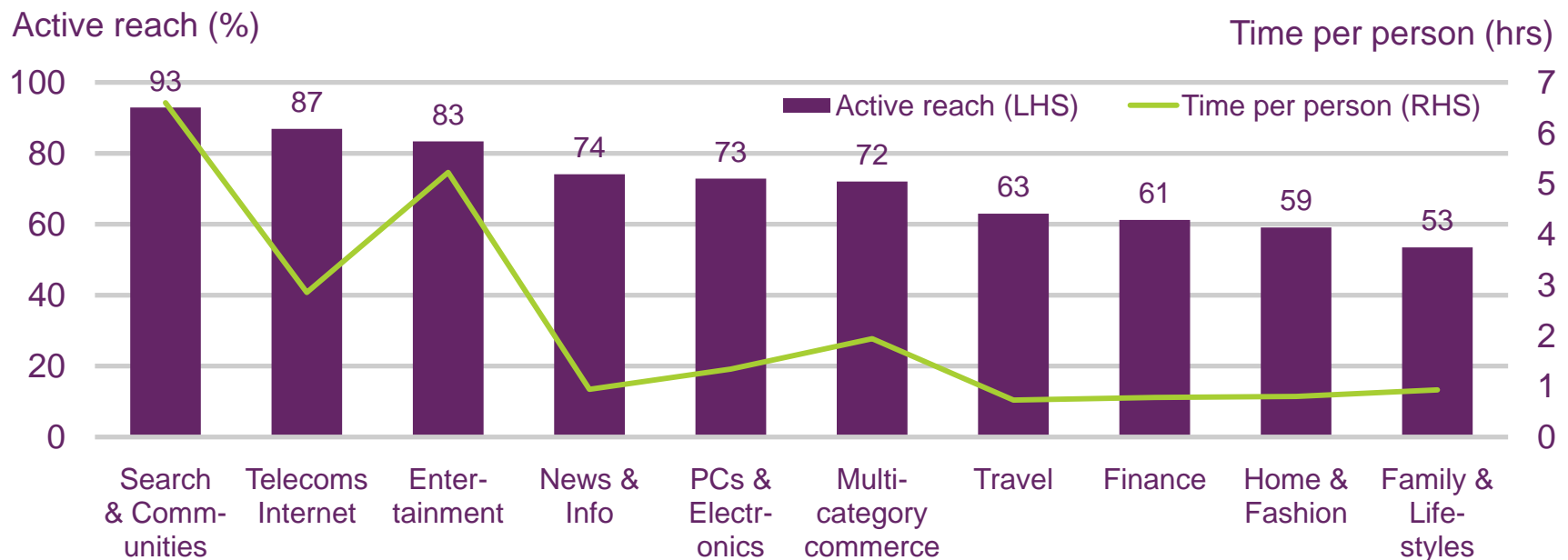


Source: UKOM/Nielsen.

Note: Home and work panel, applications included. Email excludes work-related email.

# Figure 4.28

## Most popular site categories, by active reach

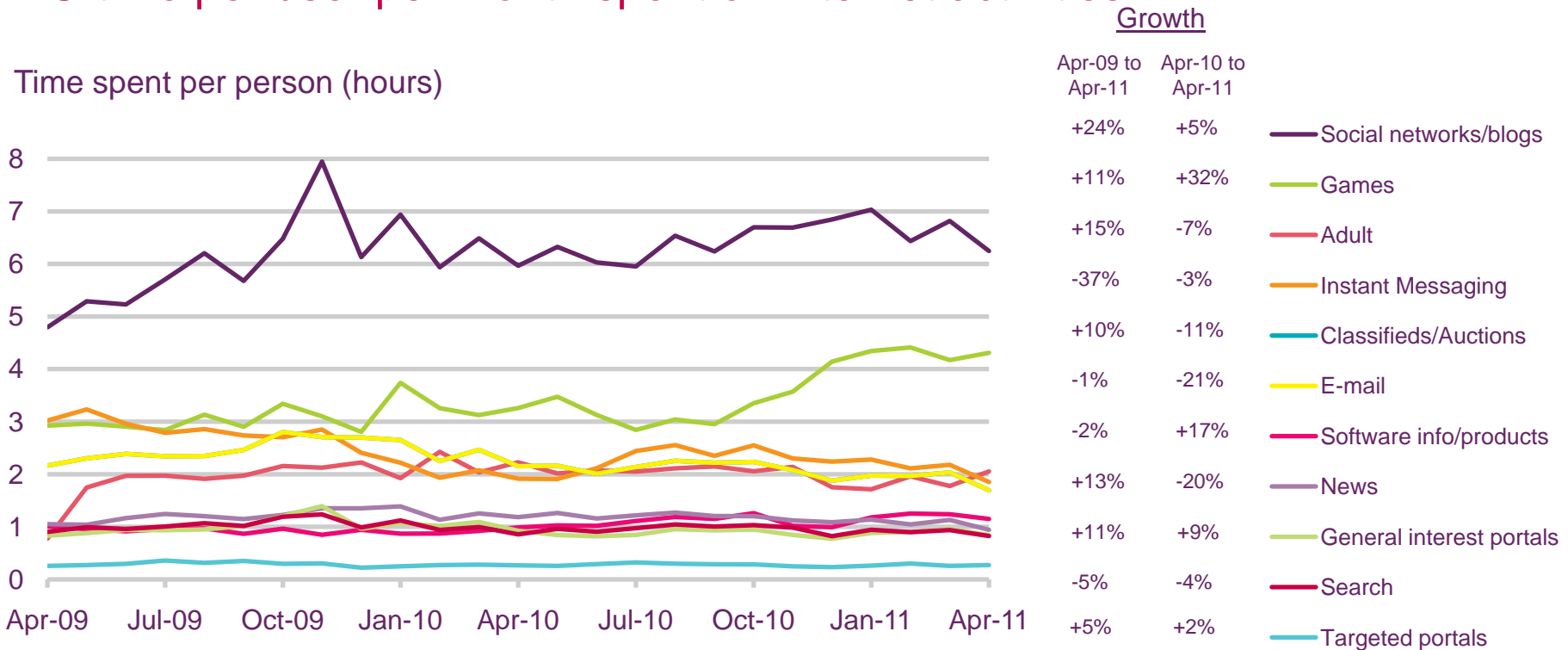


Source: UKOM/Nielsen home and work panel, applications included, month of April 2011.

Note: “active reach” = the percentage of all active 2+ unique persons who visited the site or used the application. ‘Active’ is defined as anyone who used an internet-enabled computer within the time period.

# Figure 4.29

## PC-time per user per month spent on internet activities

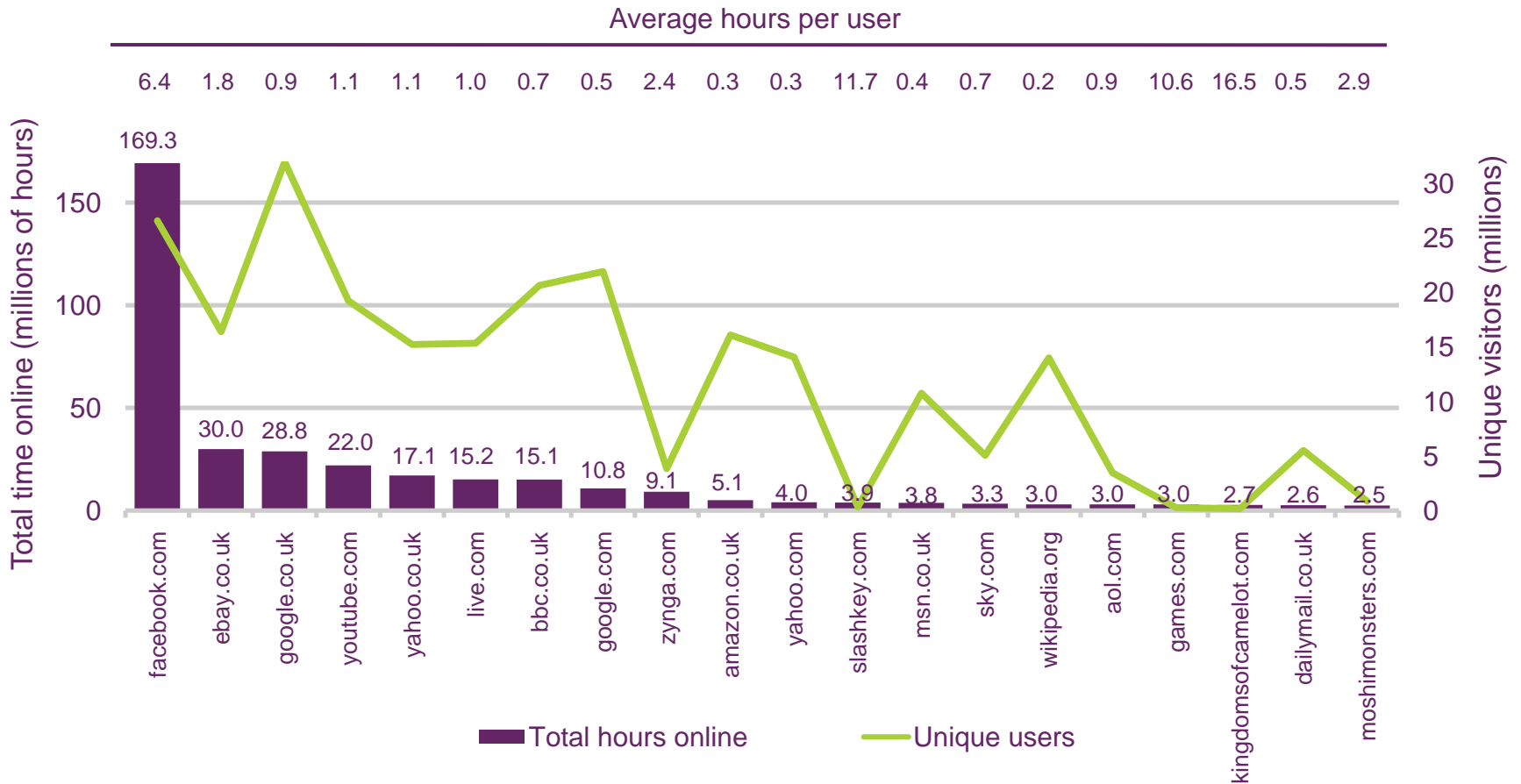


Source: UKOM/Nielsen

Notes: Home and work panel, applications included; Email excludes work-related email

# Figure 4.30

## Top 20 UK websites by time spent on PCs online, April 2011



Source: UKOM/Nielsen, April 2011; 'At home' data excluding internet applications



# Figure 4.31

## Top 10 sites by unique audience, split by age

Rank	2-17	18-24	25-34	35-49	50-64	65+
1	Google	Google	Google	Google	Google	Google
2	Google Search	Google Search	Google Search	Google Search	Google Search	Google Search
3	Facebook	Facebook	Facebook	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing
4	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	Facebook	Facebook	BBC
5	YouTube	YouTube	Yahoo!	BBC	Yahoo!	Facebook
6	BBC	Windows Live Messenger	YouTube	Yahoo!	BBC	Yahoo!
7	YouTube Homepage	YouTube Homepage	BBC	Google Maps	Amazon	Amazon
8	Yahoo!	Google Maps	Google Maps	Amazon	Google Maps	Microsoft
9	Windows Live Messenger	Yahoo!	eBay	YouTube	Microsoft	Google Maps
10	Google Image Search	BBC	Microsoft	eBay	eBay	YouTube

### Key

- Google (ex. YouTube)
- Microsoft
- Facebook
- Yahoo!
- BBC
- YouTube
- eBay
- Amazon
- Wikipedia

Source: UKOM/Nielsen home and work panel, applications included, month of April 2011

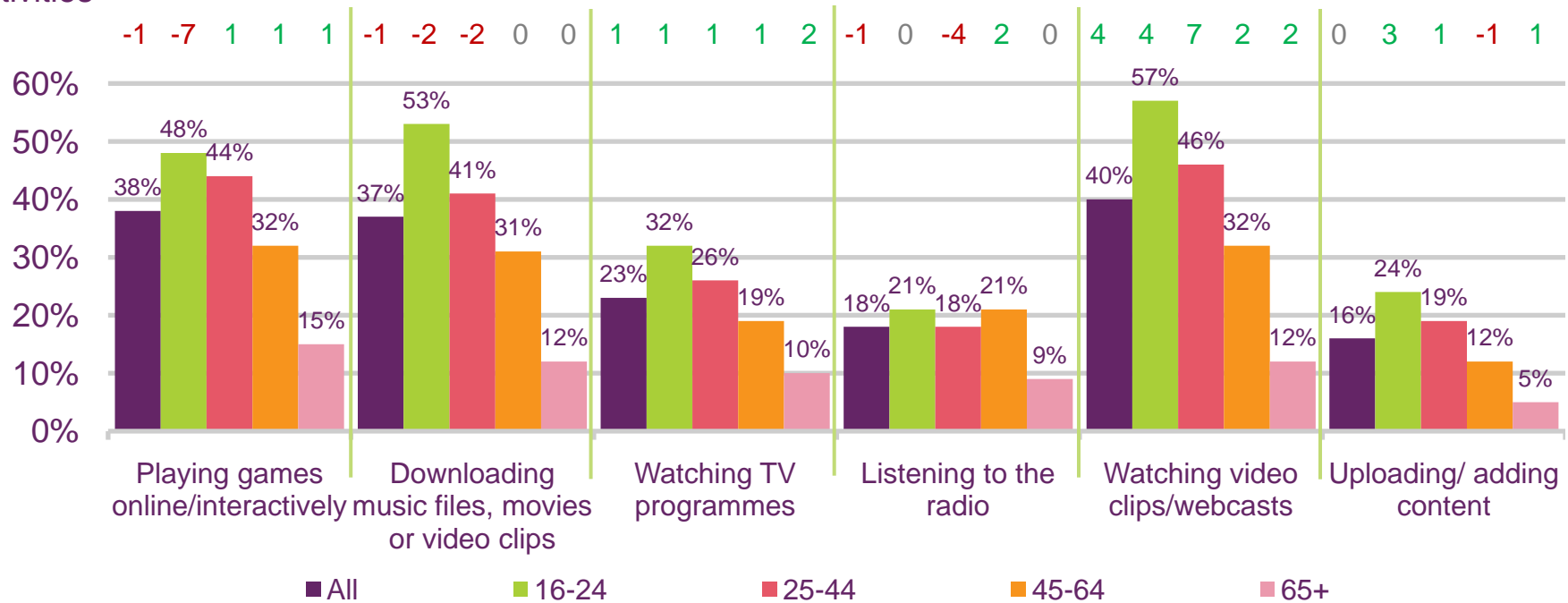
Note: "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

# Figure 4.32

## Engagement with online media content, by age

% of households who use the internet for the following activities

Increase in activities since Q1 2010 (percentage points)



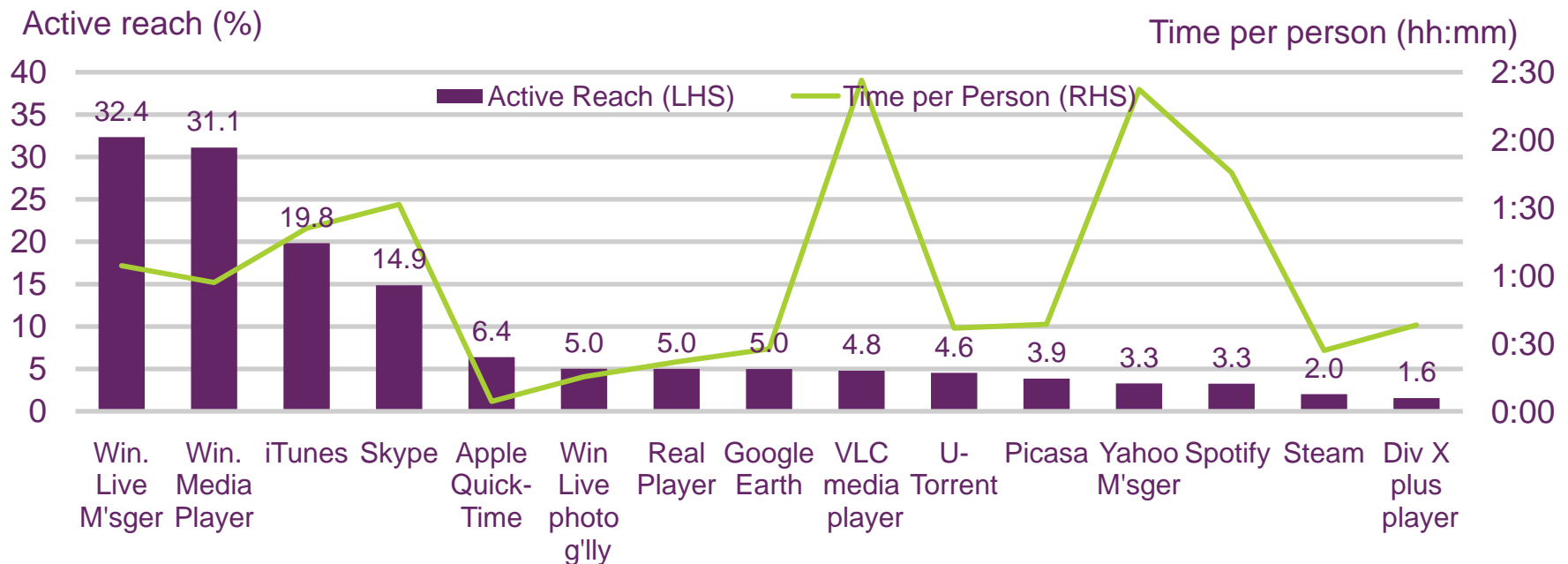
QE5A: Which, if any, of these do you or members of your household use the internet for while at home?

Source: Ofcom research, Q1 2011

Base: All adults who have the internet at home (n= 2534)

# Figure 4.33

## Most popular internet applications, by active reach

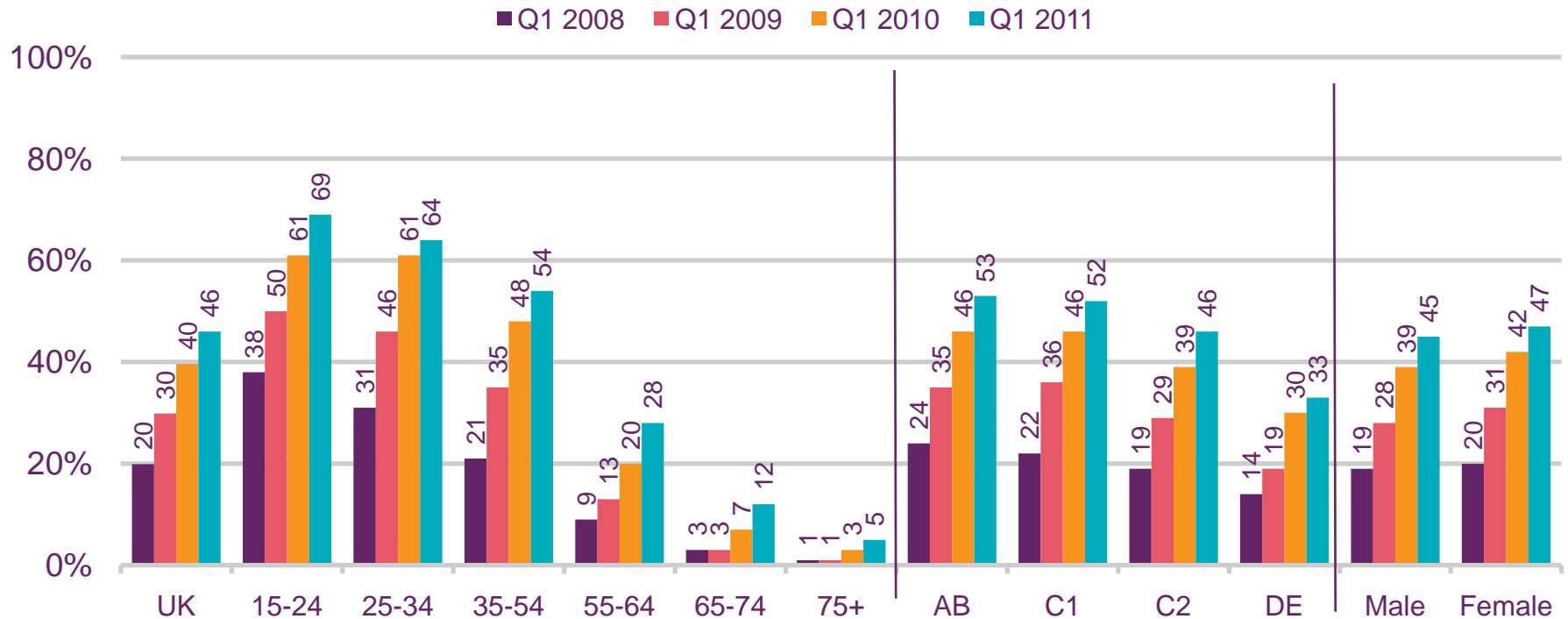


Source: UKOM /Nielsen home and work panel, applications included, month of April 2011

Note: "active reach" = the percentage of all active 2+ unique persons who visited the site or used the application. 'Active' is defined as anyone who used an internet-enabled computer within the time period.

# Figure 4.34

Proportion of adults who access social networking sites on the internet at home



QE12: Which, if any, of these do you or members of your household use the internet for while at home?

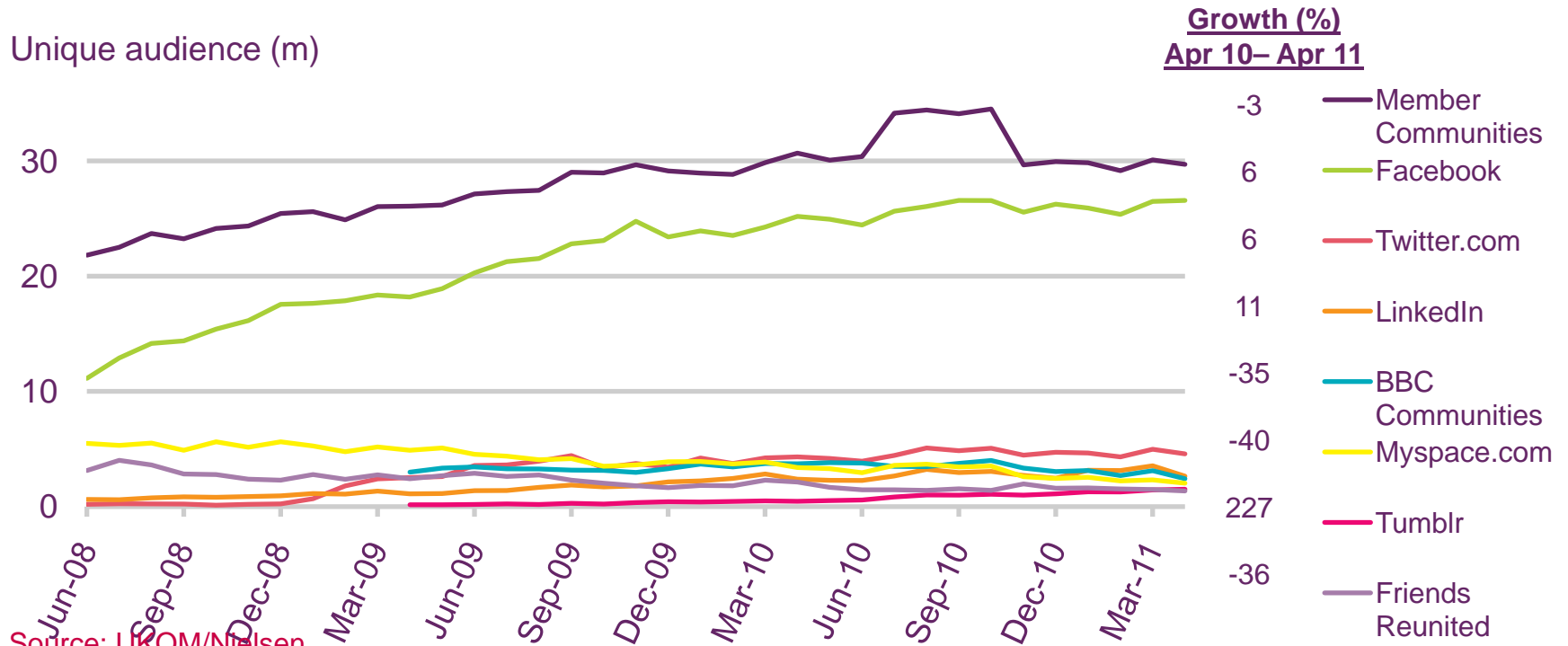
Source: Ofcom technology tracker, Q1 2011

Base: All adults aged 16+ (n = 5812 Q1 2008, 1581 Q3 2008, 6090 Q1 2009, 9013 Q1 2010, 3474 Q1 2011)

Note: Q1 2008 data in this chart are not directly comparable to data published in the 2009 Communications Market Report due to updated data provided to Ofcom.

# Figure 4.35

## Unique audience of selected social networking sites



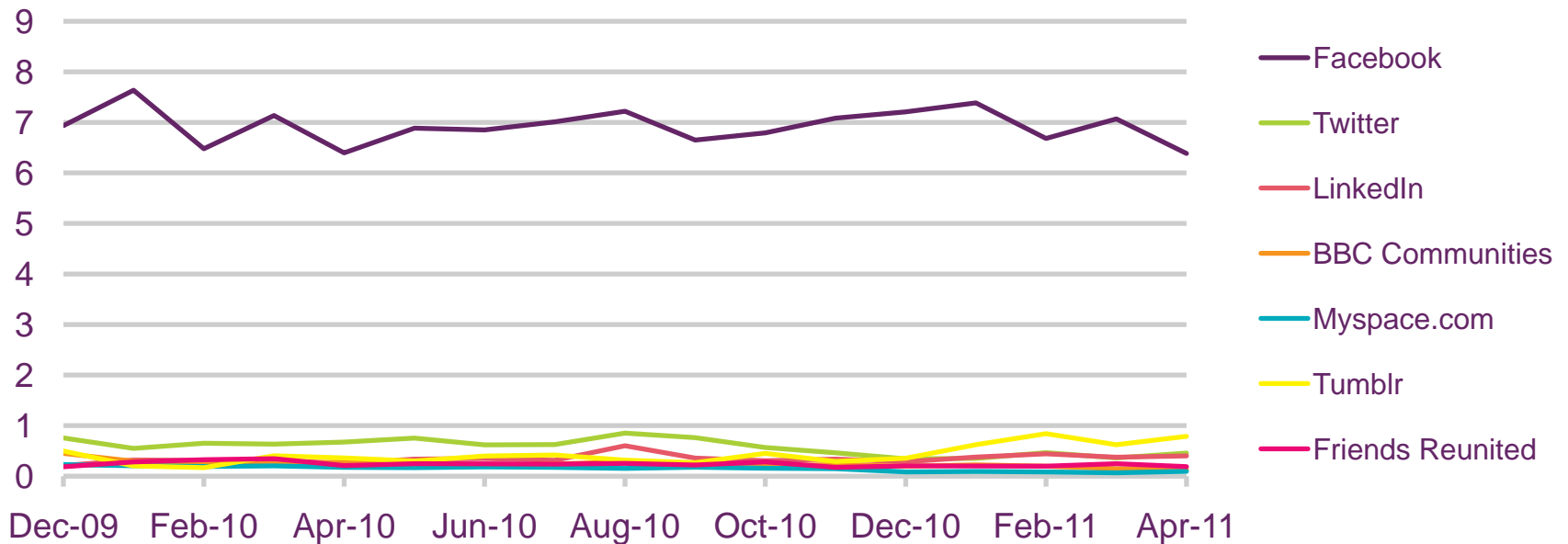
Source: UKOM/Nielsen.

Note: Home and work panel, applications included. 'Member communities' is the UKOM category that primarily consists of social networking sites. "Unique audience" = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

## Figure 4.36

### Time per user per month spent on selected social networking sites

Time per person (hrs)



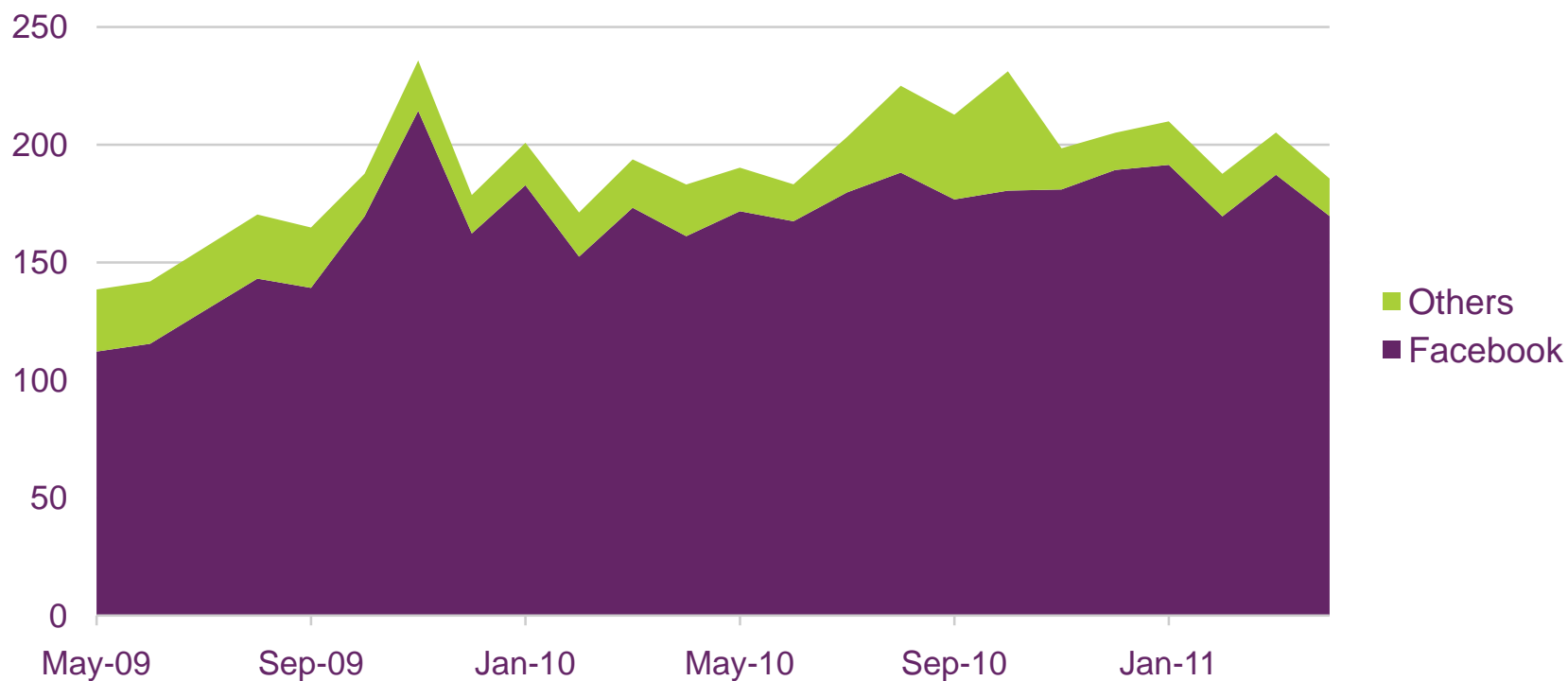
Source: UKOM/Nielsen.

Note: home and work panel, applications included.

# Figure 4.37

## Total time spent on social networking and blogging sites

Millions of hours per month



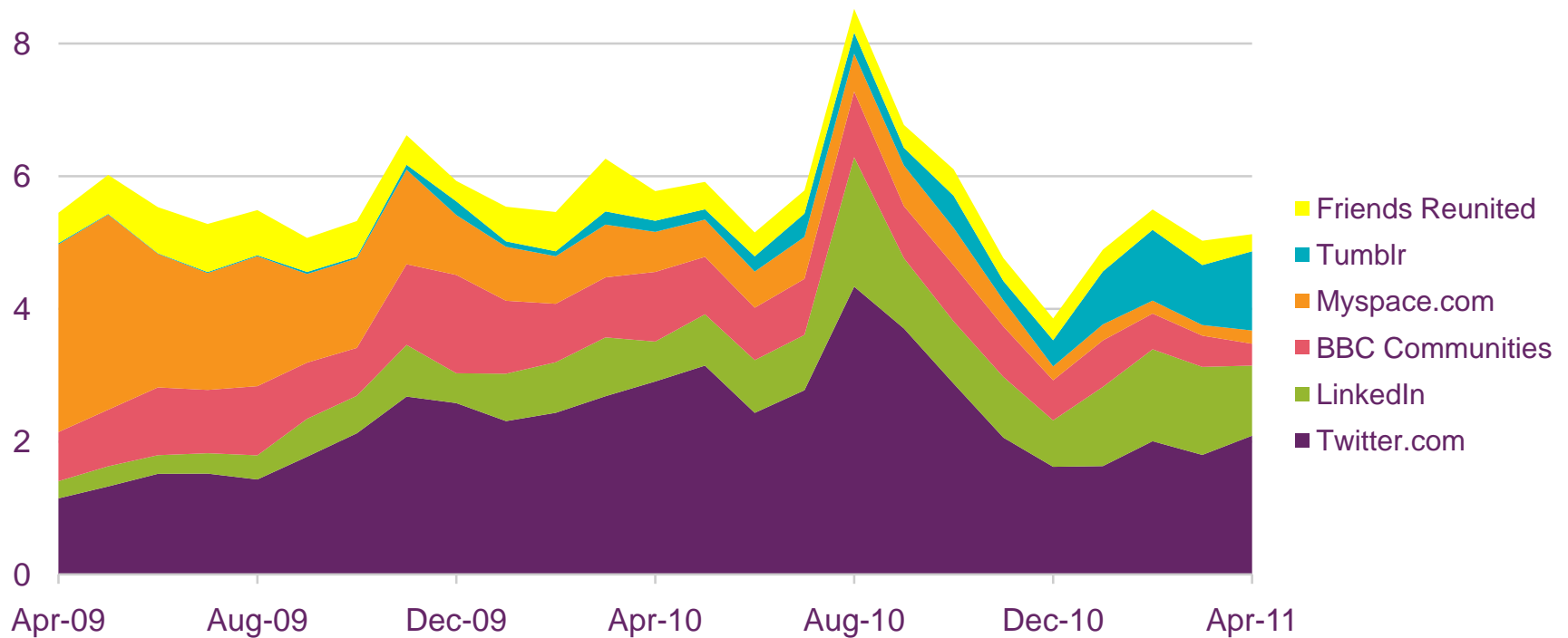
Source: UKOM/Nielsen.

Note: Includes all sites in the UKOM/Nielsen category of 'Member Communities'

# Figure 4.38

## Total time spent on selected social networking sites (excluding Facebook)

Millions of hours per month



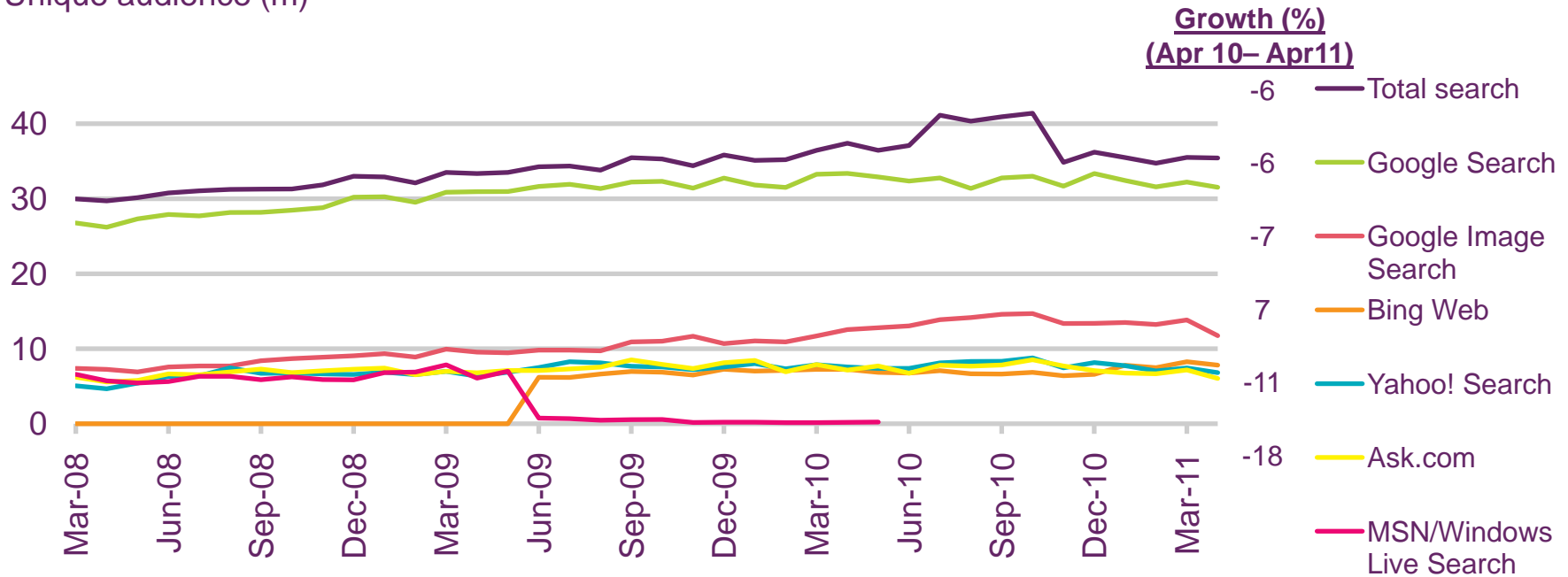
Source: UKOM/Nielsen.



# Figure 4.39

## Unique audience of leading search sites

Unique audience (m)

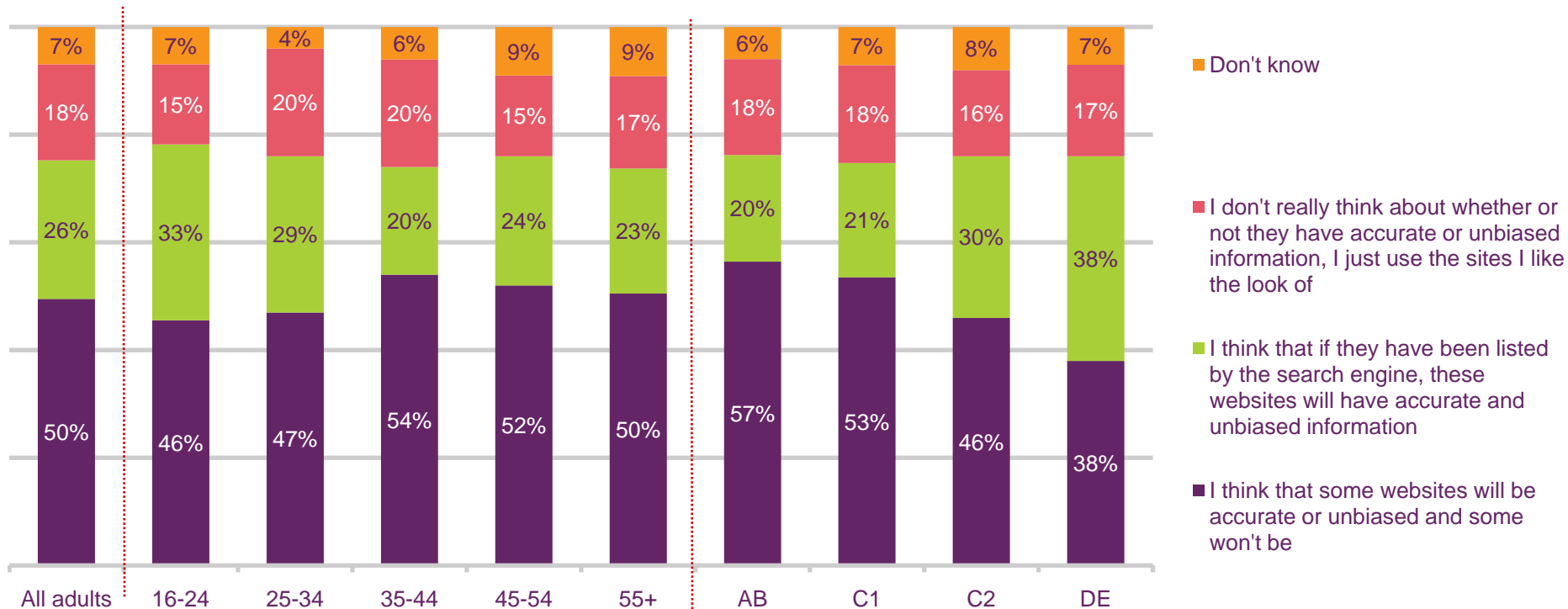


Source: UKOM /Nielsen home and work panel, applications included, month of Apr 11

Note: “Unique audience” = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

# Figure 4.40

## User attitudes towards accuracy or bias of search engine results



NIN46 – When you use a search engine to find information, you enter a query in the search box and the search engine will then show some links to websites in the results pages. Which one of these is closest to your opinion about the level of accuracy or bias of the information detailed in the websites that appear in the results pages? (Prompted responses, single coded)

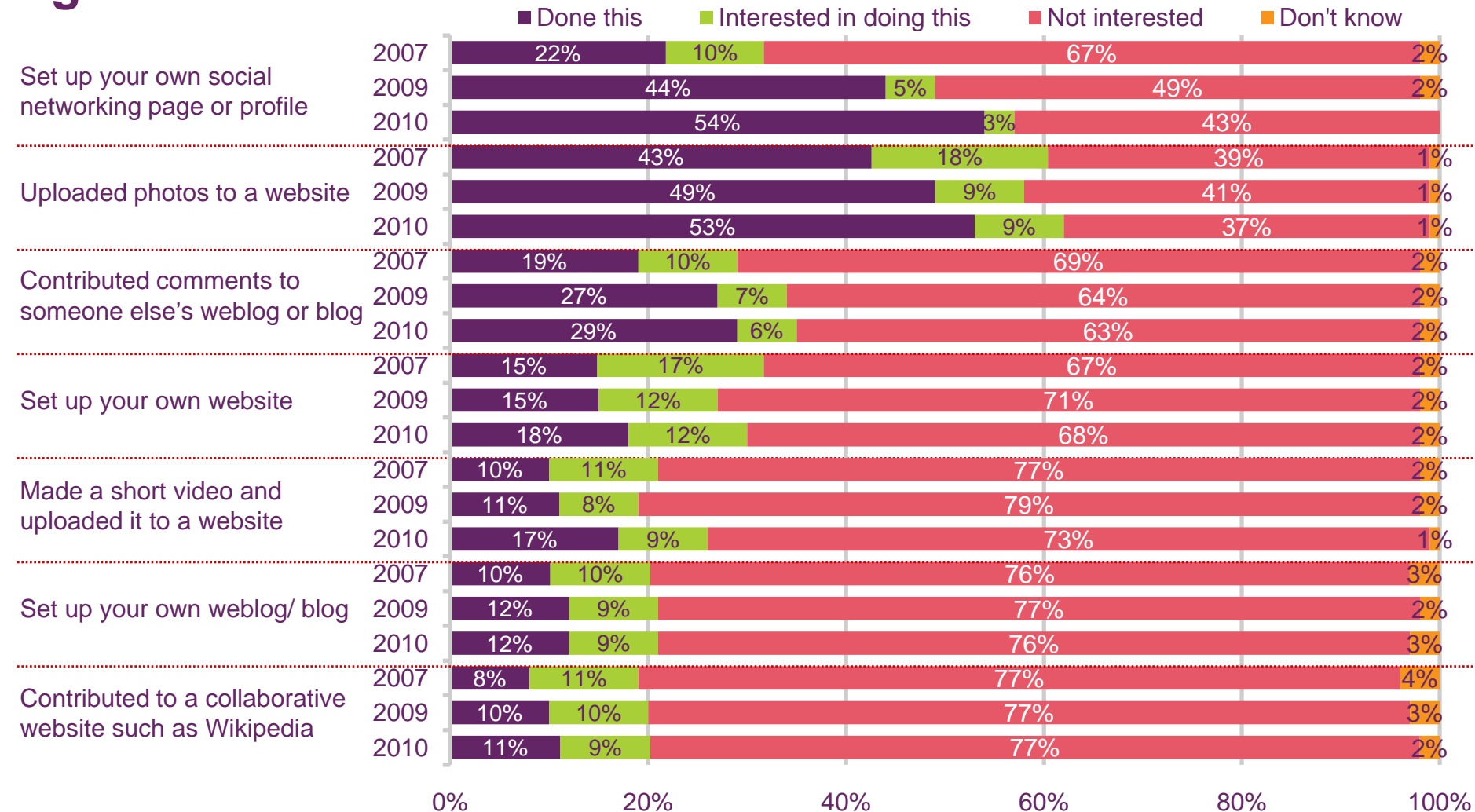
Base: All adults aged 16+ who ever use search engine websites (1090 aged 16+, 205 aged 16-24, 227 aged 25-34, 235 aged 35-44, 183 aged 45-54, 240 aged 55+, 329 AB, 353 C1, 199 C2, 209 DE)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Experience of, and interest in, content creation



## Figure 4.41



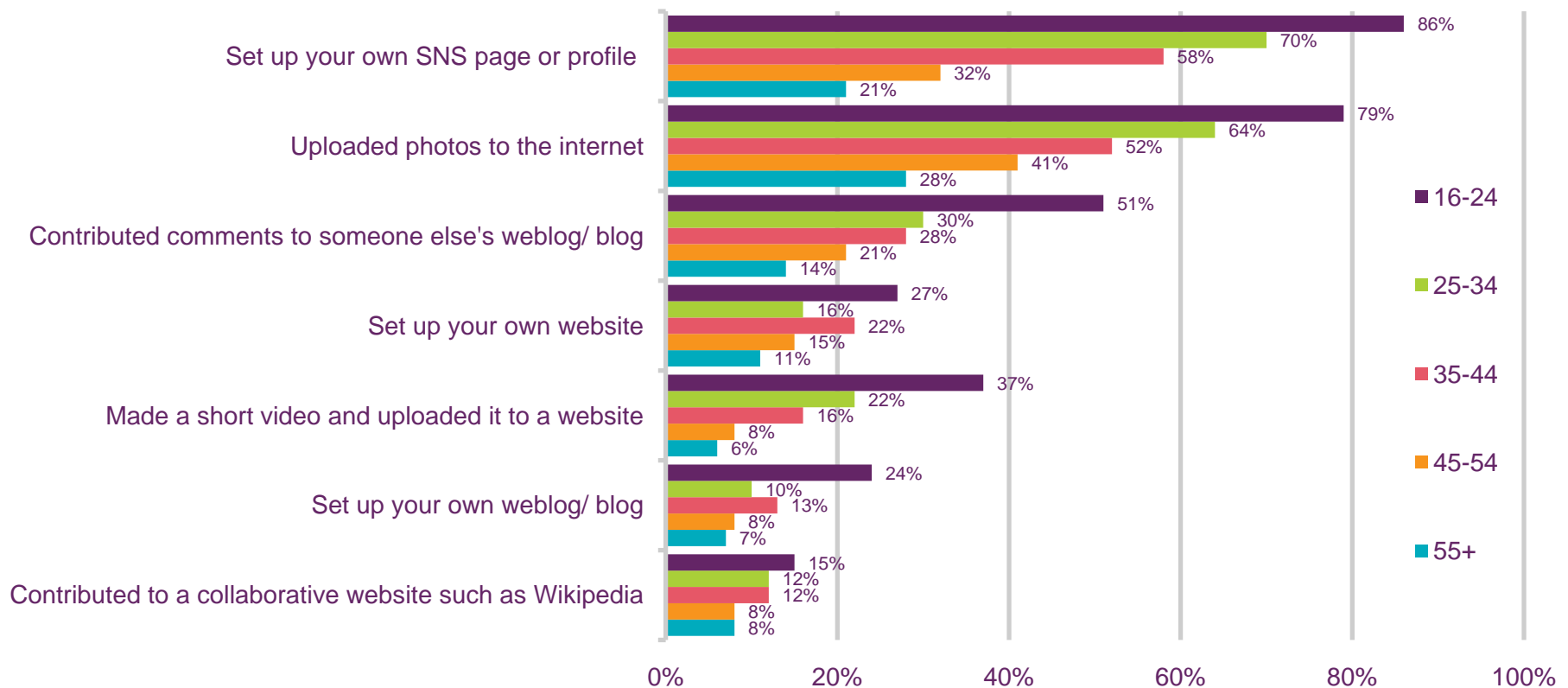
IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested. (prompted responses, single coded)

Base: All who use the internet at home or elsewhere (1723 in 2007, 1282 in 2009, 1489 in 2010) Significance testing shows any change between 2009 and 2010

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Figure 4.42

## Experience of creative activities, by age



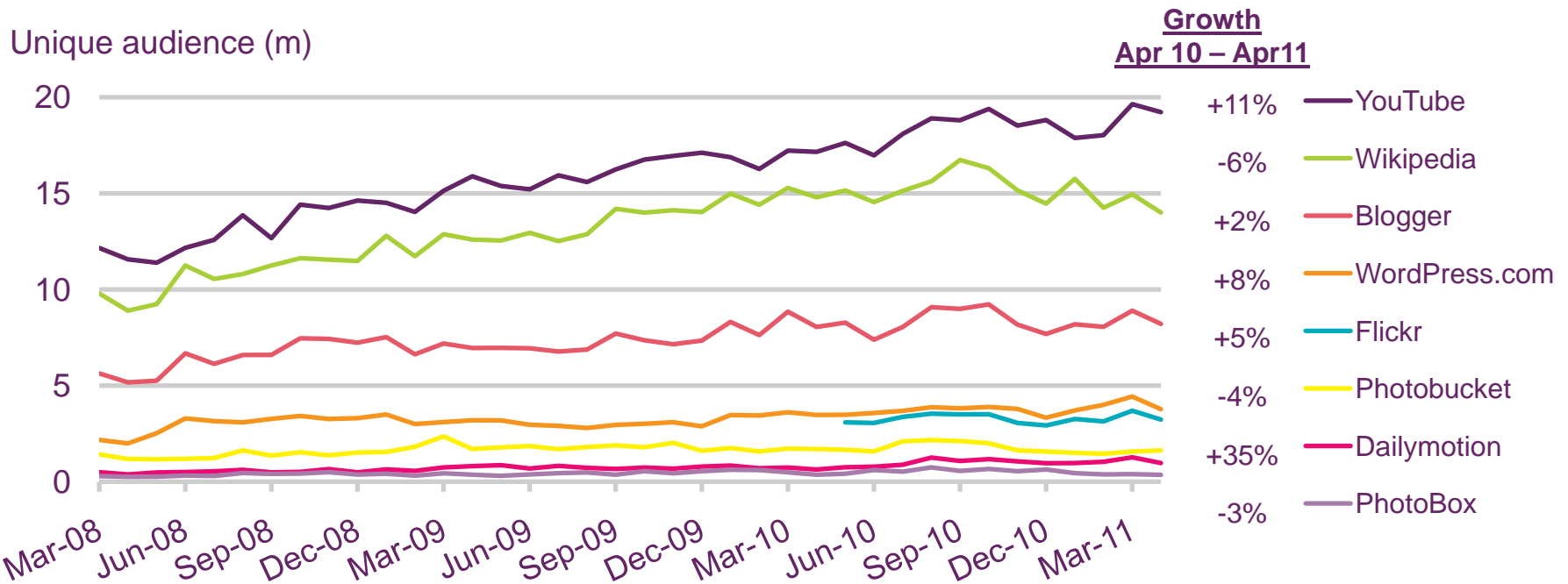
IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested.

All who use the internet at home or elsewhere (271 aged 16-24, 287 aged 25-34, 338 aged 35-44, 245 aged 45-54, 348 aged 55+)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2010

# Figure 4.43

## Unique audience of selected user-generated content sites

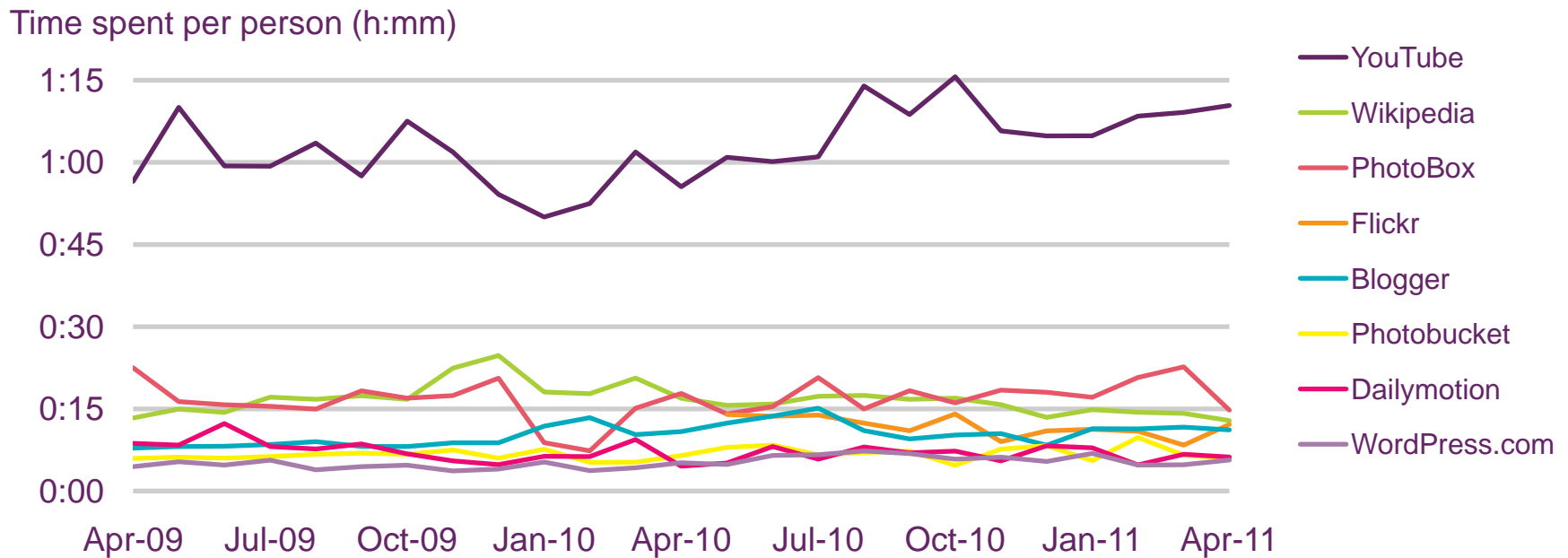


Source: UKOM /Nielsen home and work panel, applications included,

Note: “Unique audience” = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once. Flickr due to UKOM changes no data available pre May10.

# Figure 4.44

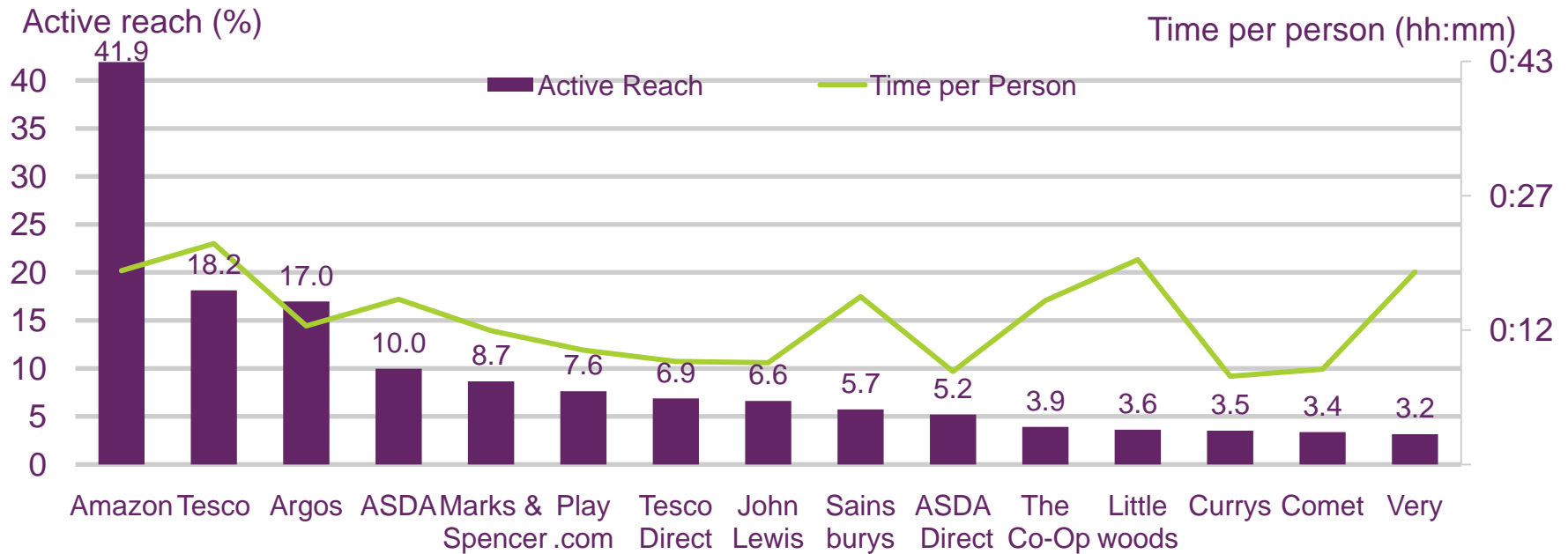
## Time spent on selected user-generated content sites



Source: UKOM/Nielsen, home and work panel,

# Figure 4.45

## Mass Merchandising by active reach

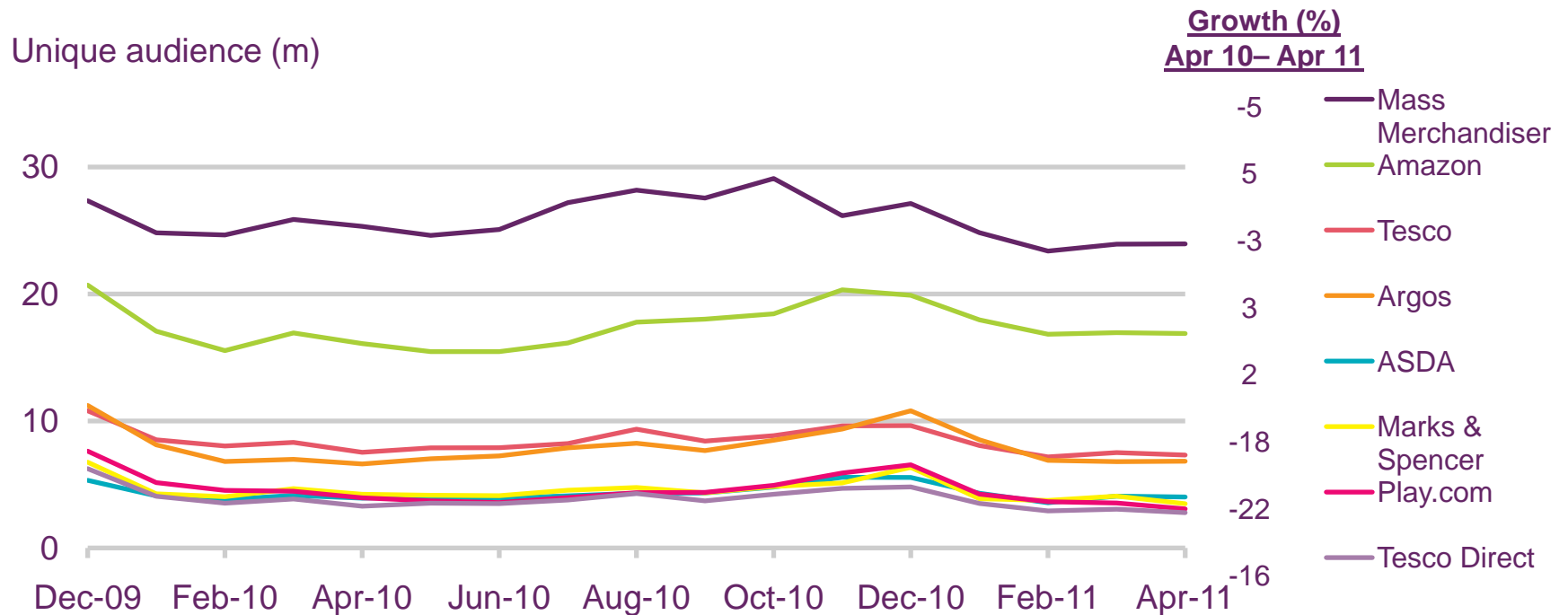


Source: UKOM/Nielsen home and work panel, month of April 2011

Note: "active reach" = the percentage of all active 2+ unique persons who visited the site or used the application. 'Active' is defined as anyone who used an internet-enabled computer within the time period.

# Figure 4.46

## Unique audience of selected Mass merchandising sites



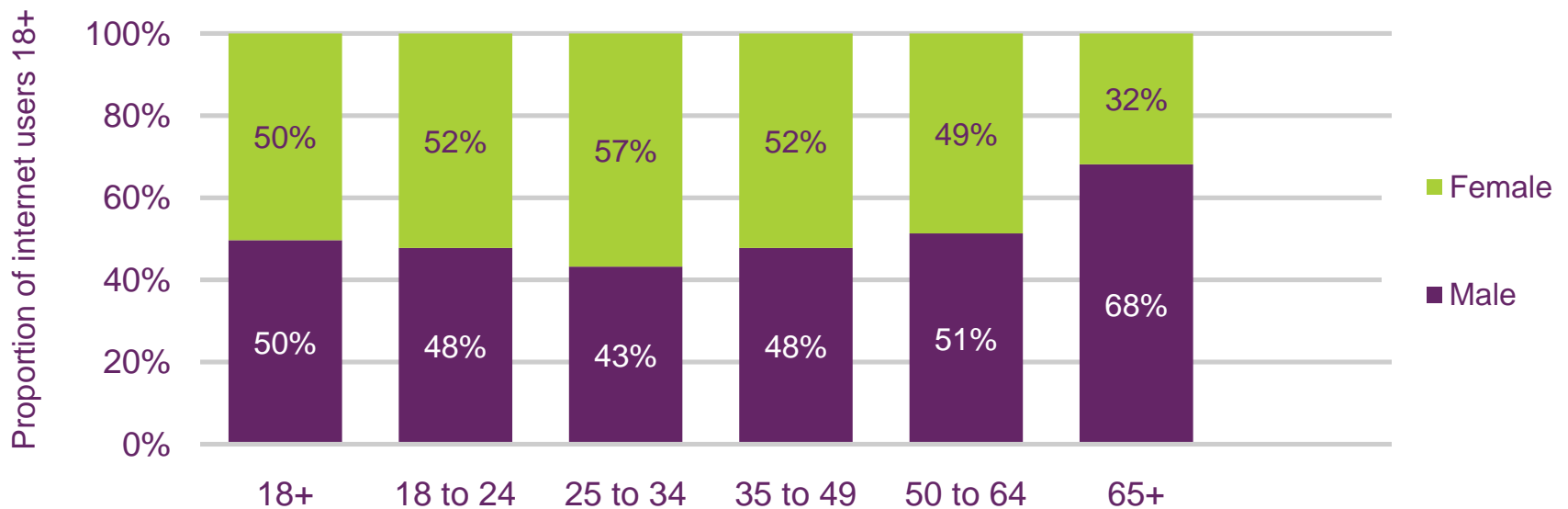
Source: UKOM/Nielsen.

Note: Home and work panel, 'Unique audience' = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.



## Figure 4.47

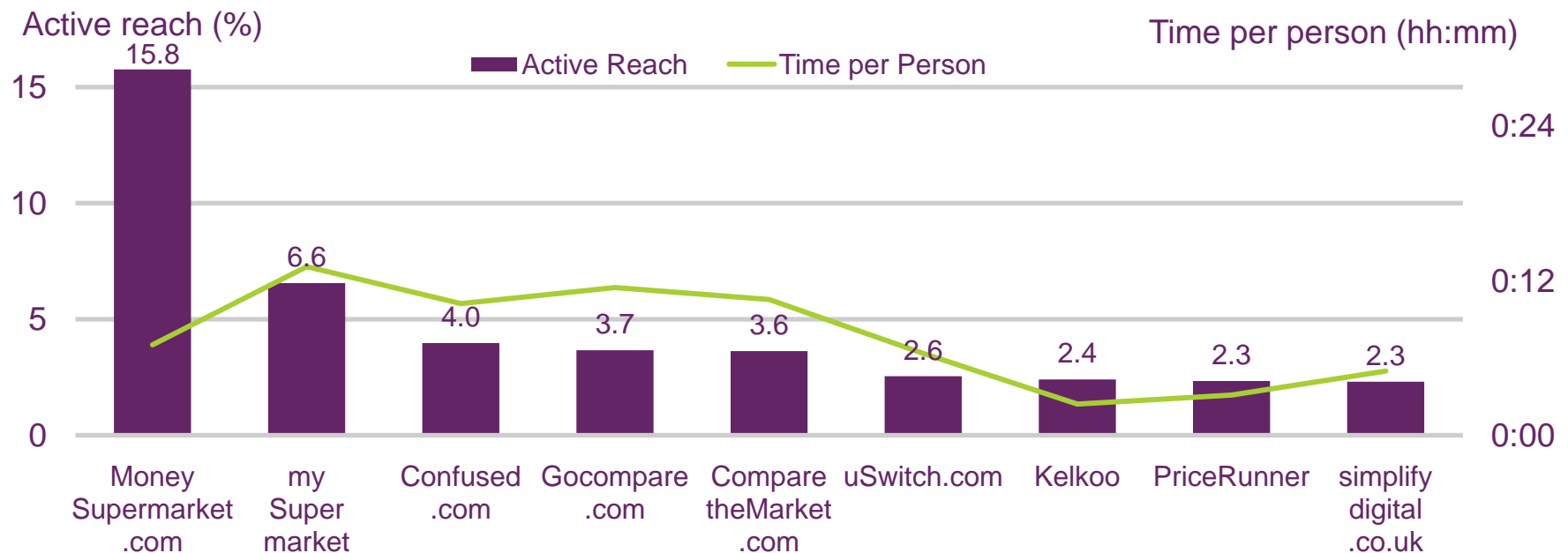
### Mass Merchandising usage by gender



Source: UKOM /Nielsen April 2011

## Figure 4.48

Selected Reach and time spent on selected price comparison sites, April 2011

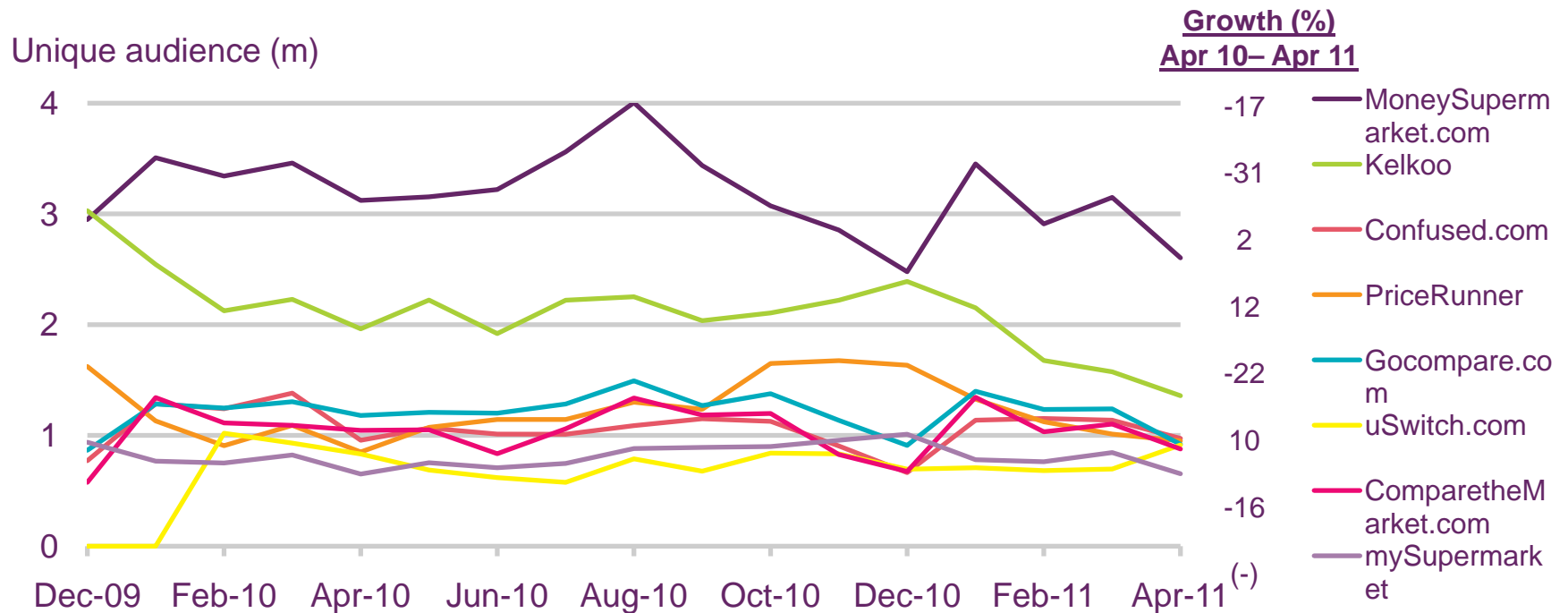


Source: UKOM/Nielsen home and work panel, month of April 2011

Note: “active reach” = the percentage of all active 2+ unique persons who visited the site or used the application. ‘Active’ is defined as anyone who used an internet-enabled computer within the time period.

# Figure 4.49

## Unique audience of Selected Price Comparison Sites

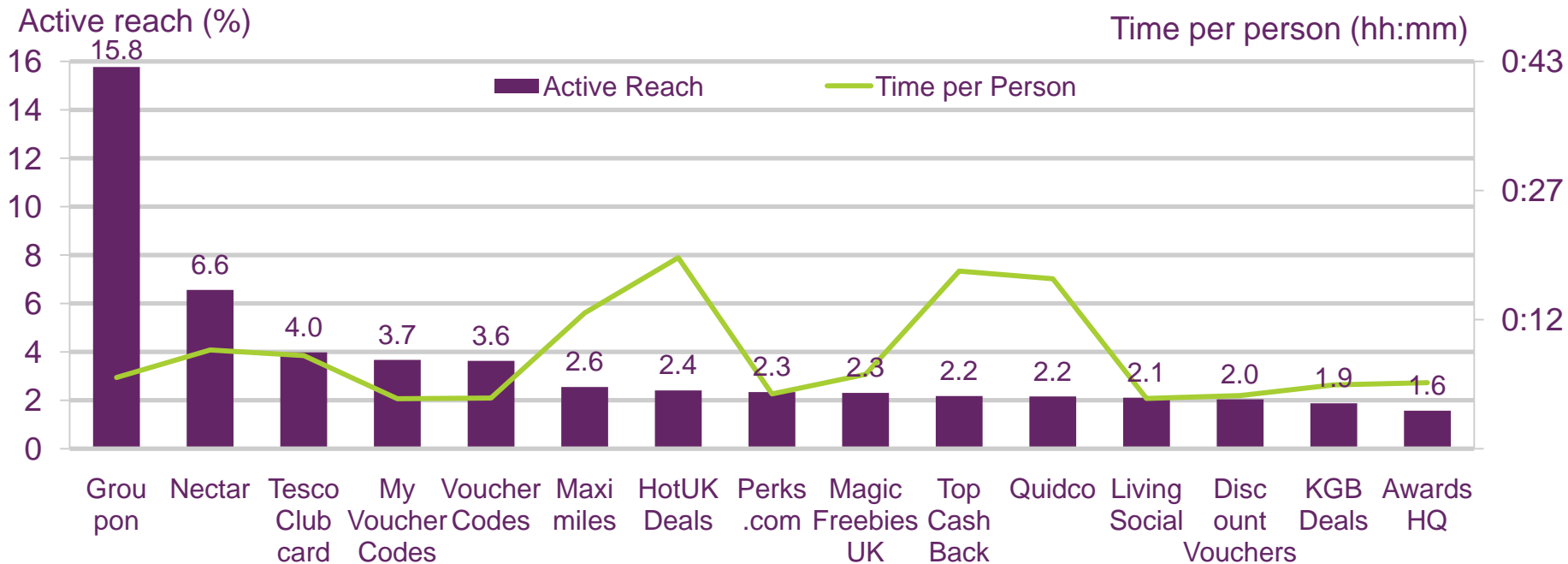


Source: UKOM/Nielsen.

Note: Home and work panel, 'Unique audience' = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once.

# Figure 4.50

## Coupon Sites active reach

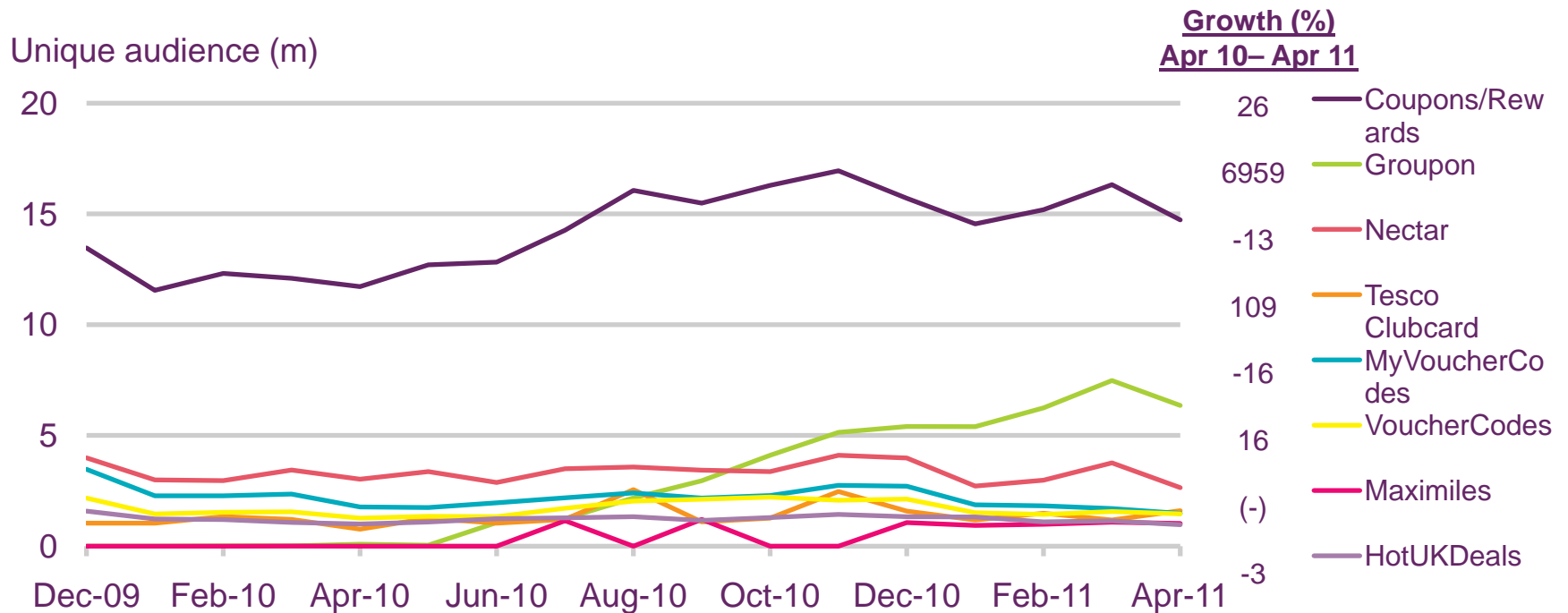


Source: UKOM/Nielsen home and work panel, month of April 2011

Note: "active reach" = the percentage of all active 2+ unique persons who visited the site or used the application. 'Active' is defined as anyone who used an internet-enabled computer within the time period.

# Figure 4.51

## Selected coupon and rewards sites: active reach

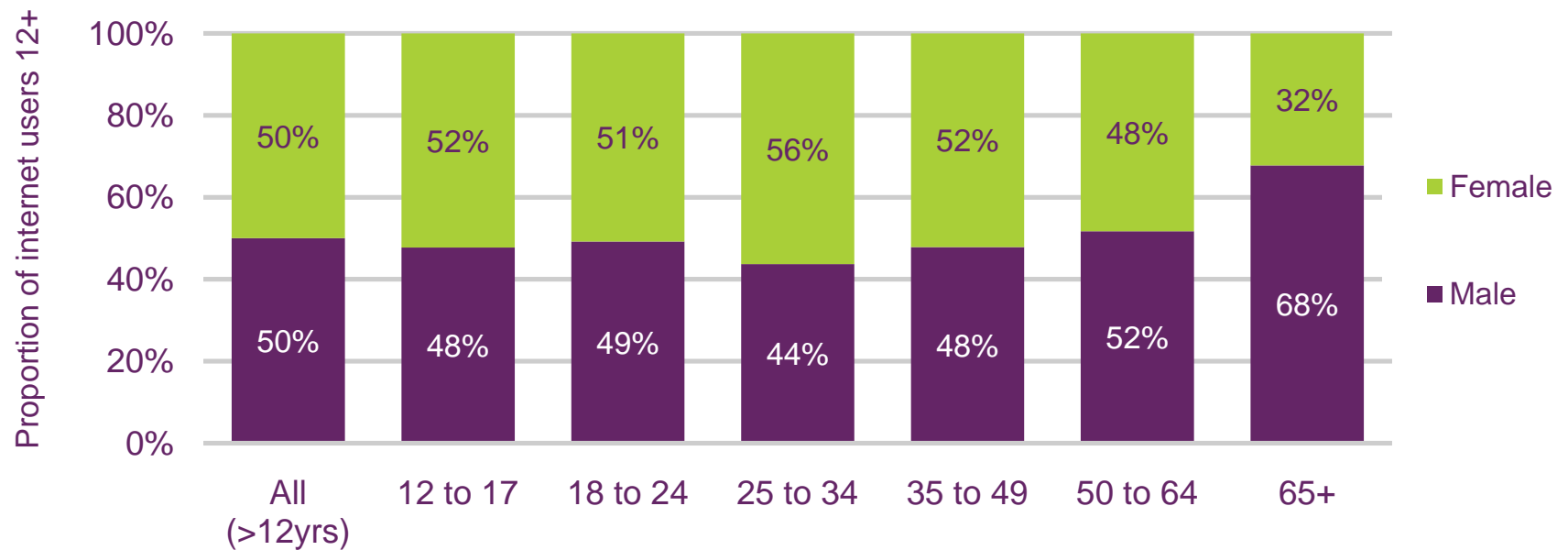


Source: UKOM/Nielsen.

Note: Home and work panel, 'Unique audience' = the total number of unique persons that have visited a website or used an application at least once in the specified reporting period. Persons visiting the same website or using the same application more than one time in the reporting period are only counted once. Maximiles data unavailable for some months  
Groupon not available pre Feb10.

## Figure 4.52

### Coupon Sites: reach by gender



Source: UKOM /Nielsen April 2011