

# 5. Internet and Web-based Content

ICMR 2013

# 5.1 KEY MARKET DEVELOPMENTS

## 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, persons 15+

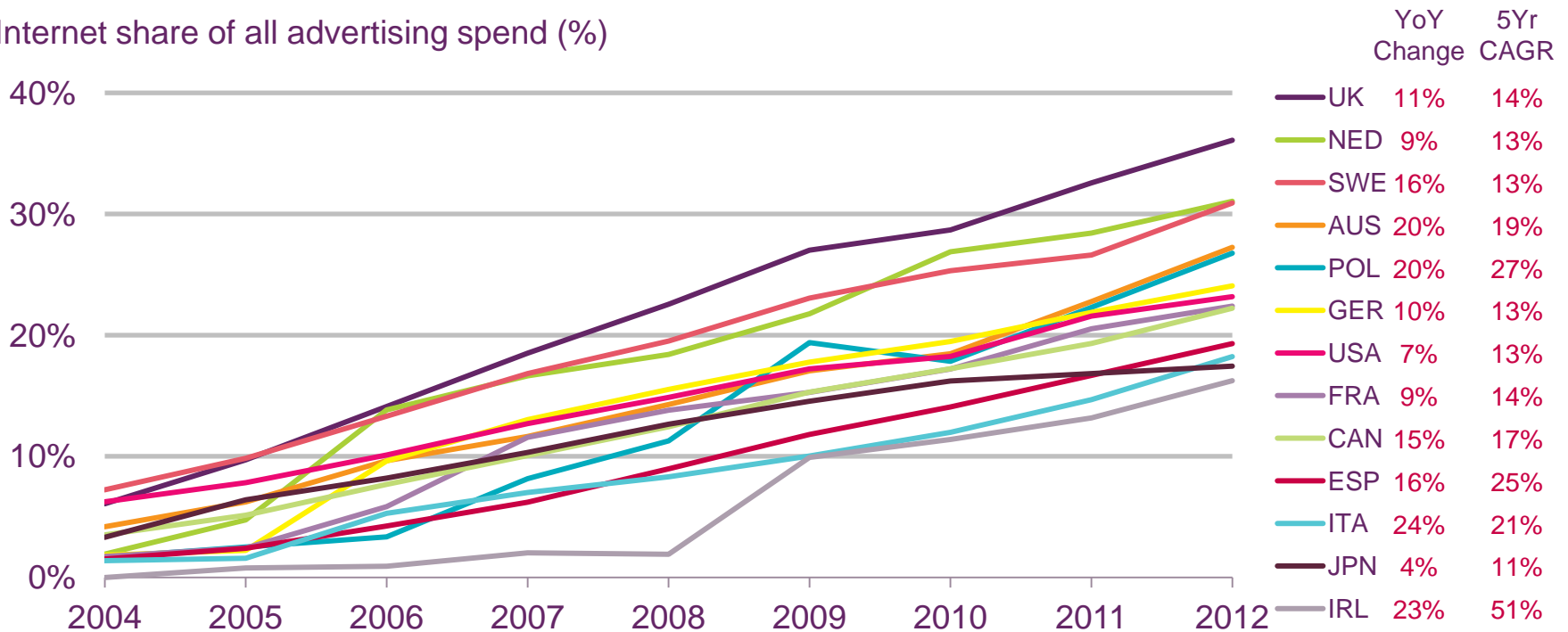
† IDATE / Industry data / Ofcom, 2013.

‡ Ofcom international research, September 2013, internet users 18+

# Figure 5.2

## Internet share of total advertising spend

Internet share of all advertising spend (%)



Source: Warc data ([www.warc.com](http://www.warc.com))

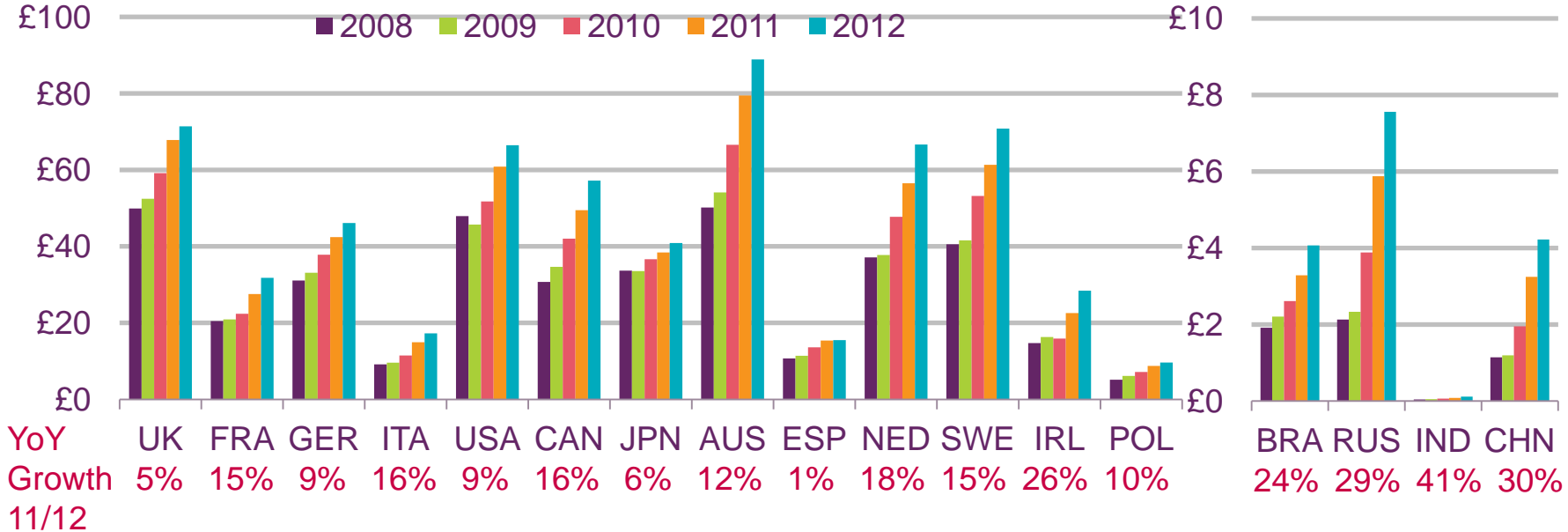
Please refer to notes on adspend data for further detail and source information.

<http://www.warc.com/NotesOnAdspendData>

# Figure 5.3

## Wired internet advertising expenditure per head: 2008-12

Internet advertising spend per head (GBP)

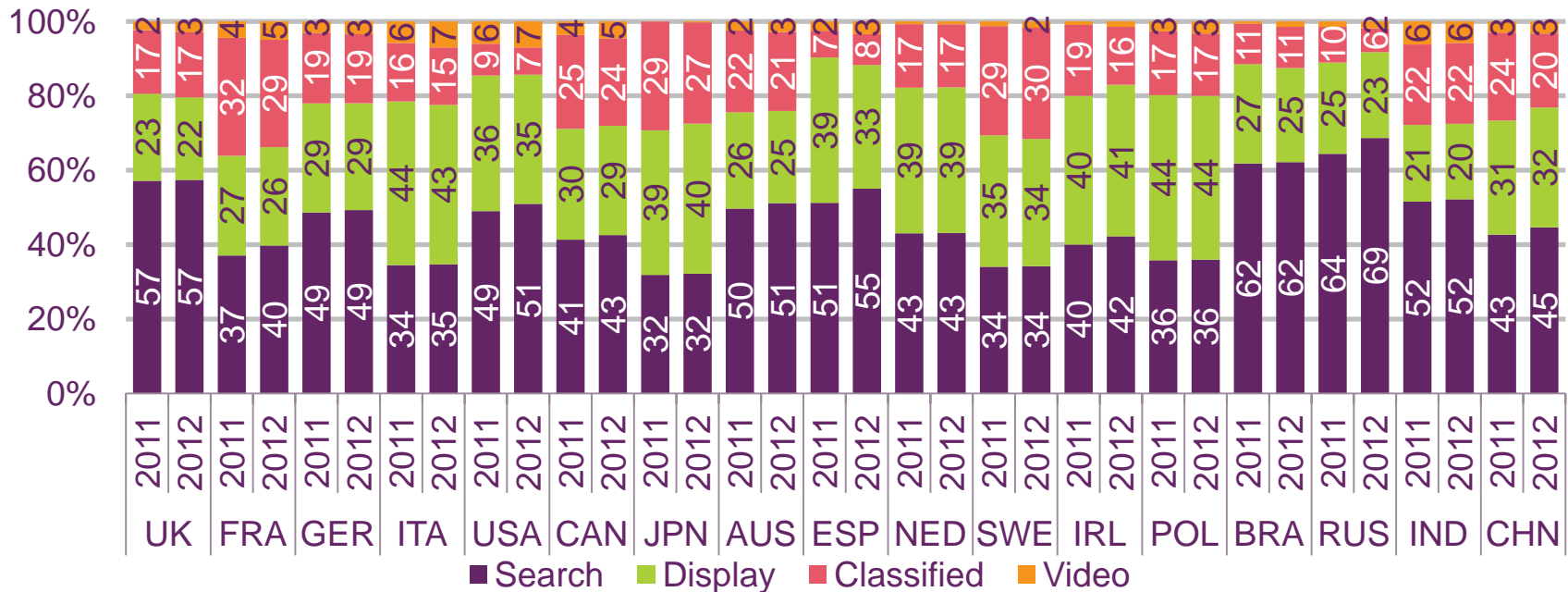


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017 [www.pwc.com/outlook](http://www.pwc.com/outlook); US Census Bureau (end of year estimates from mid-year values)

# Figure 5.4

## Wired internet advertising expenditure, by category: 2011-12

Proportion of internet advertising revenue (%)

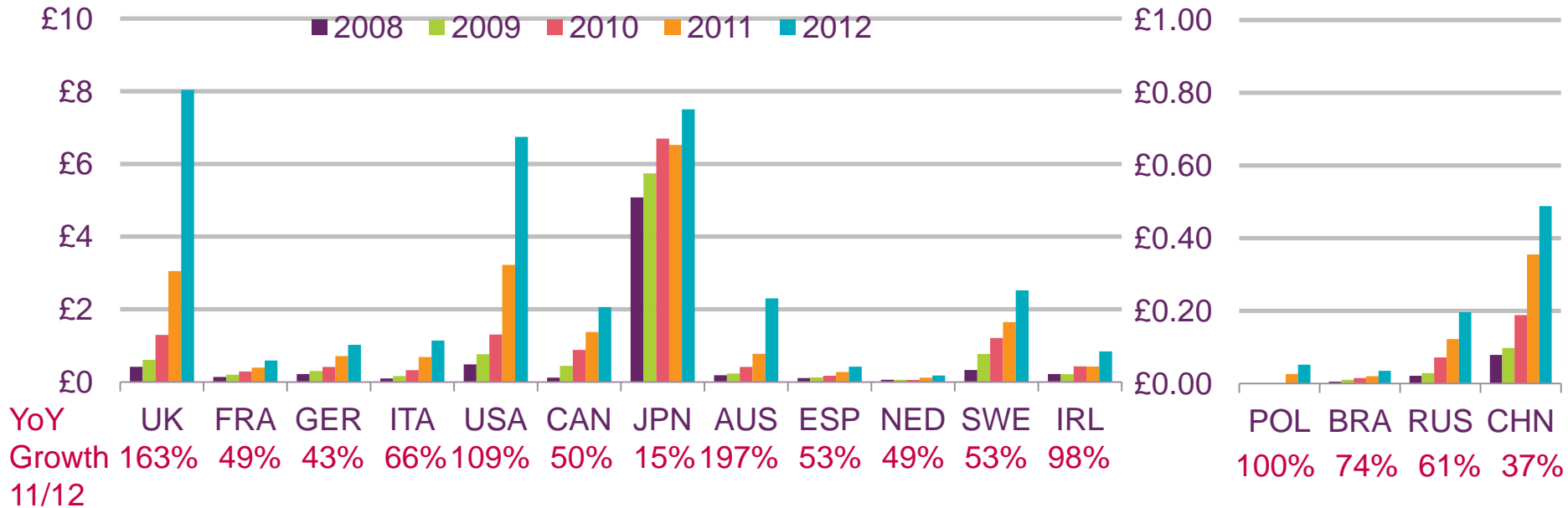


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017  
[www.pwc.com/outlook](http://www.pwc.com/outlook)

# Figure 5.5

## Mobile advertising expenditure per head: 2008-12

Mobile advertising spend per head (GBP)

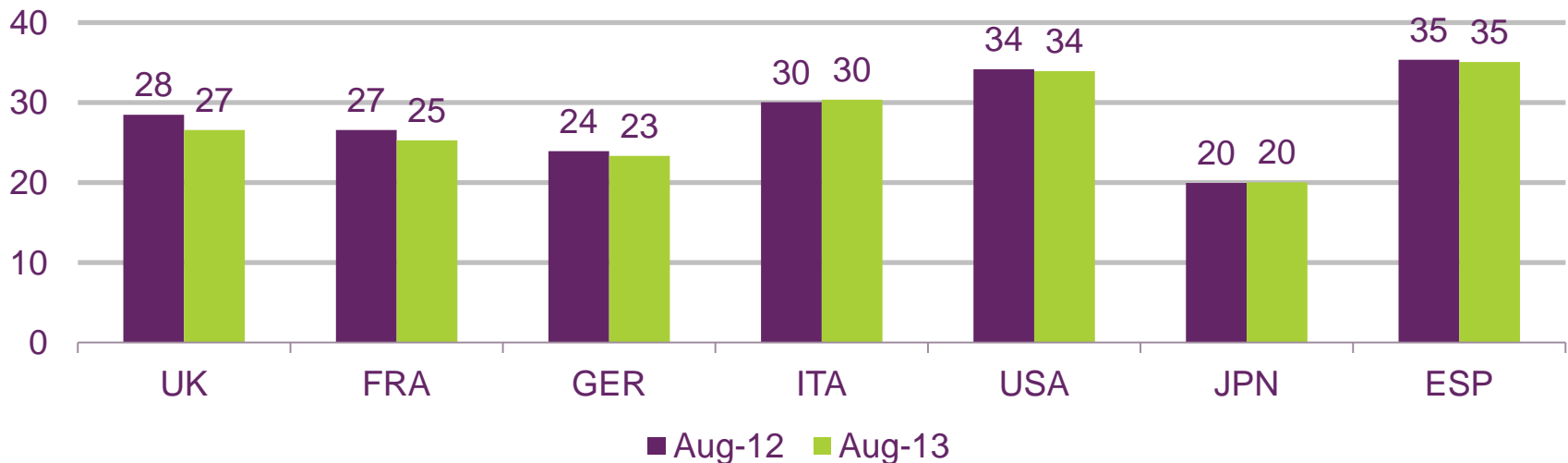


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2013-2017 [www.pwc.com/outlook](http://www.pwc.com/outlook); US Census Bureau (end of year estimates from mid-year values)

## Figure 5.6

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

Mobile internet users (%)



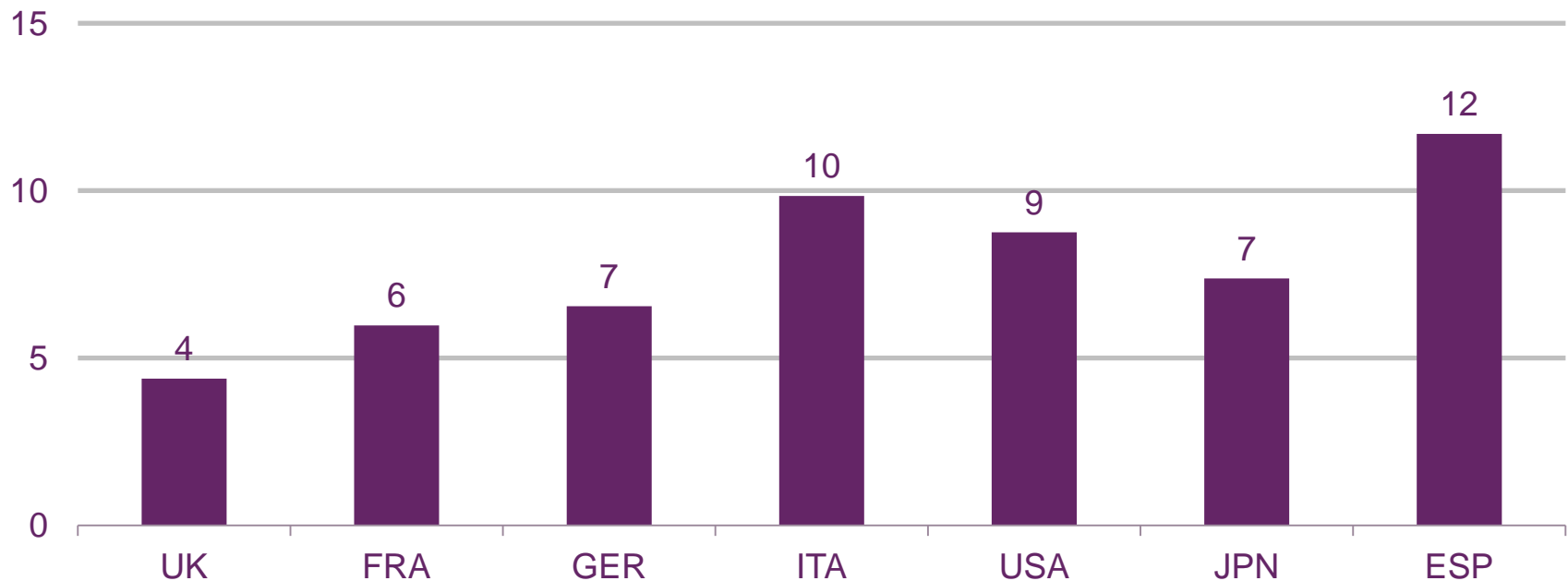
Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+



## Figure 5.7

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

Mobile internet users (%)

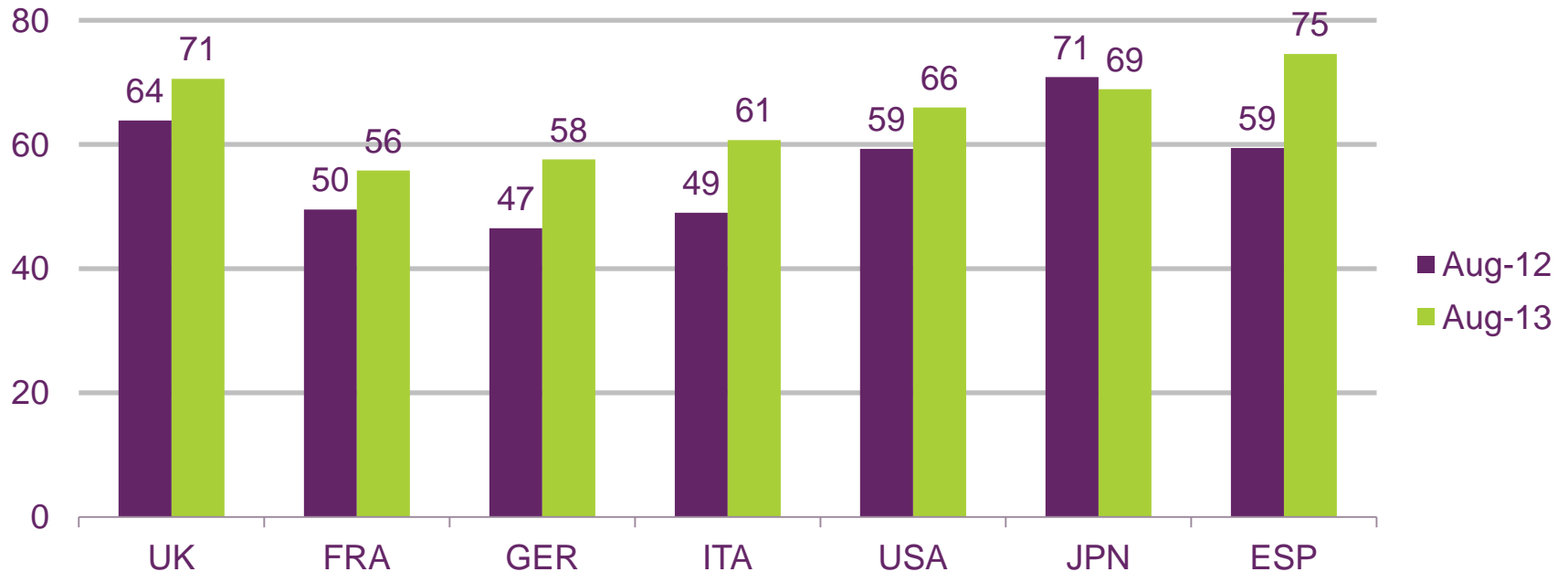


Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+

## Figure 5.8

### Mobile internet take-up

Mobile users 13+ (%)



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

## Figure 5.9

### Profile of mobile internet users, by gender

Mobile internet users (%)

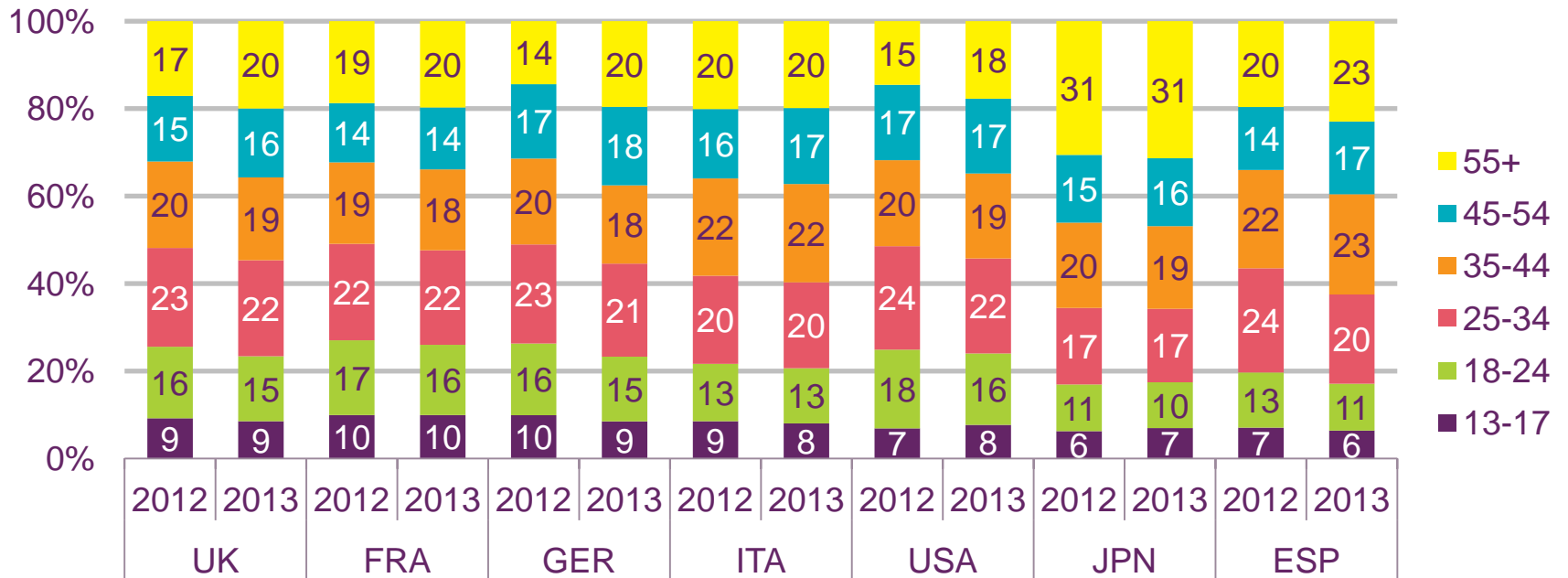


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

# Figure 5.10

## Profile of mobile internet users, by age

Mobile internet users 13+ (%)

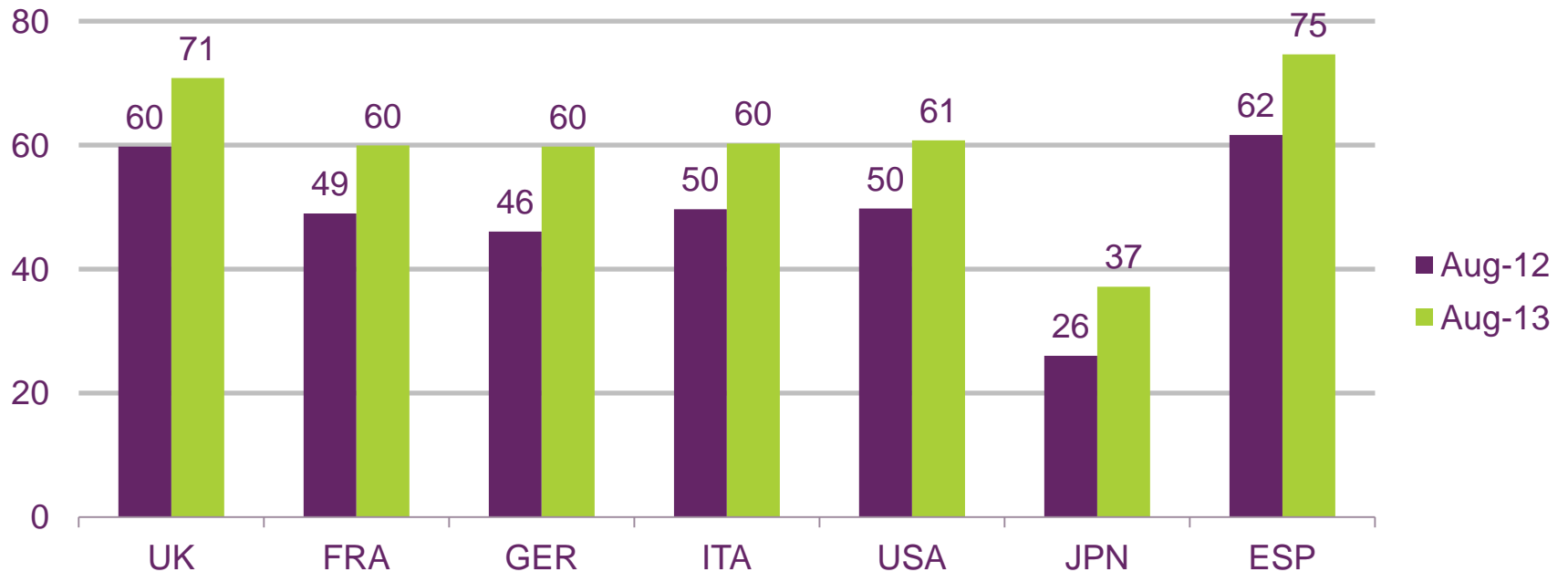


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

# Figure 5.11

## Smartphone take-up

Mobile users (%)

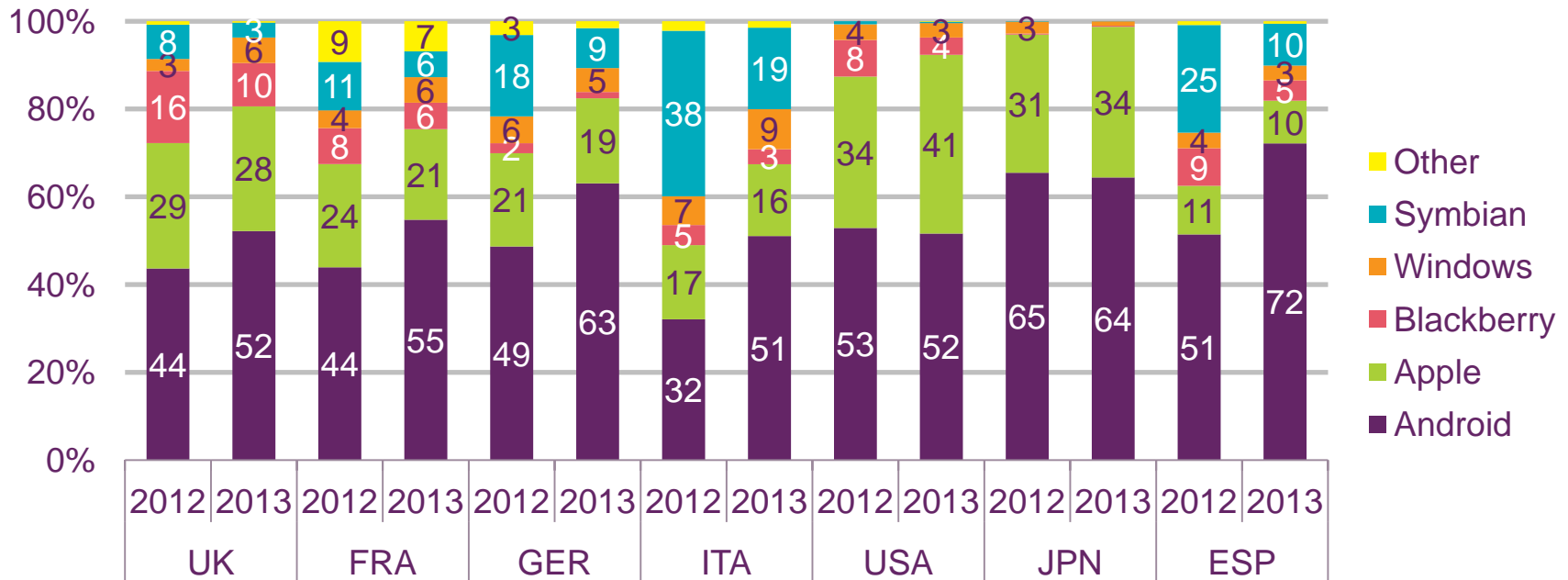


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile users aged 13+

# Figure 5.12

## Smartphone operating system take-up

Smartphone users (%)

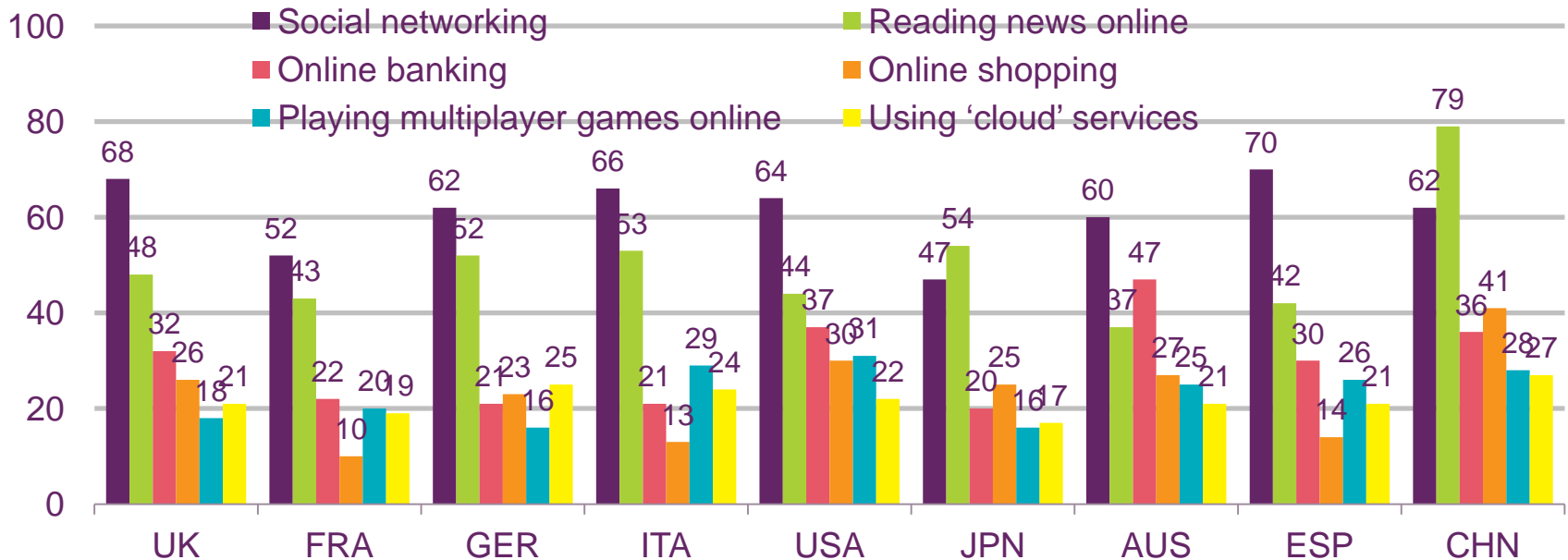


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), smartphone users aged 13+

# Figure 5.13

## Internet activities conducted on a mobile phone/smartphone

Mobile phone/smartphone owners (%)



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?

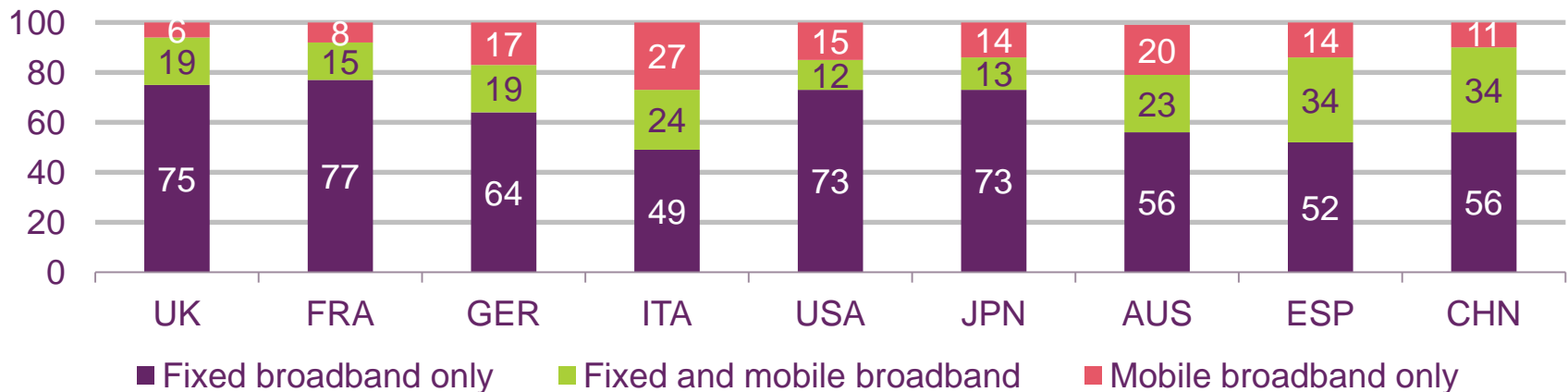
# 5.2 INTERNET AND DEVICES



## Figure 5.14

### Take-up of fixed and mobile broadband among broadband households

Broadband households(%)



Source: Ofcom consumer research September 2013

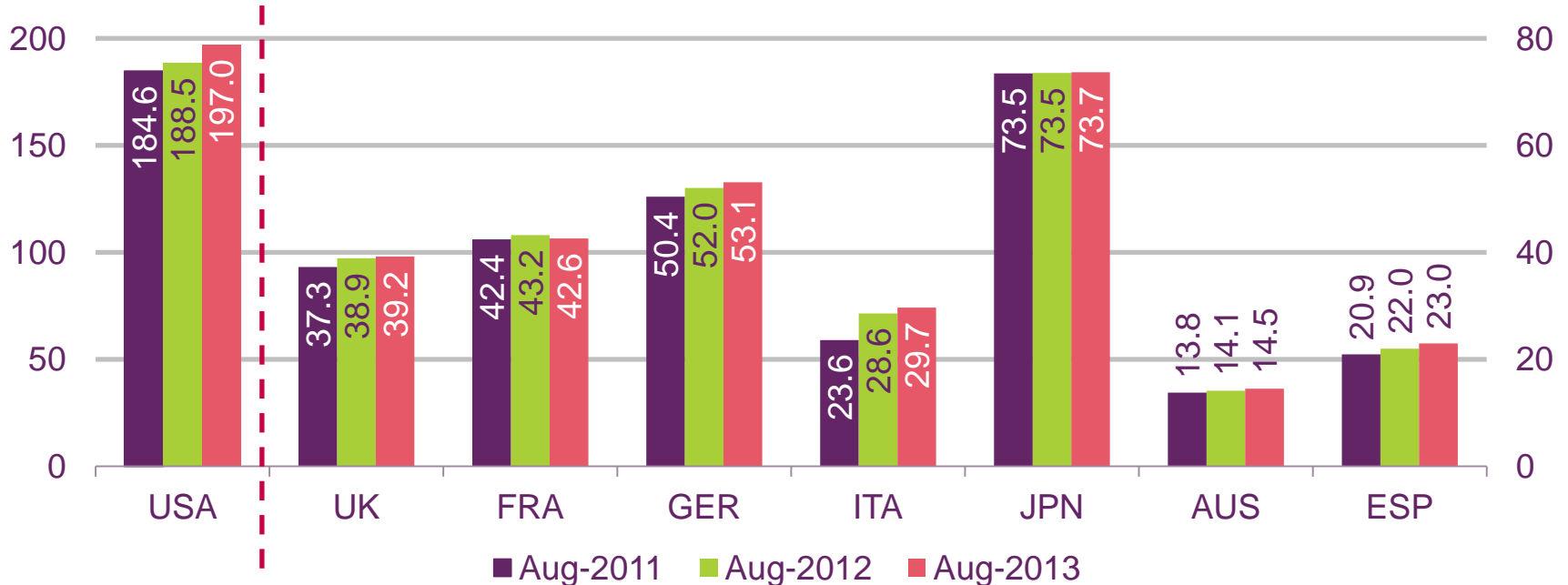
Base: All respondents, UK=961, FRA=946, GER=892, ITA=920, USA=827, JPN=782, AUS=950, ESP=910, CHN=933.

Q3b. Which of the following services do you have in your home?

# Figure 5.15

## Active audience on laptop and desktop computers: 2011-13

Online audience (millions)



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

## Figure 5.16

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

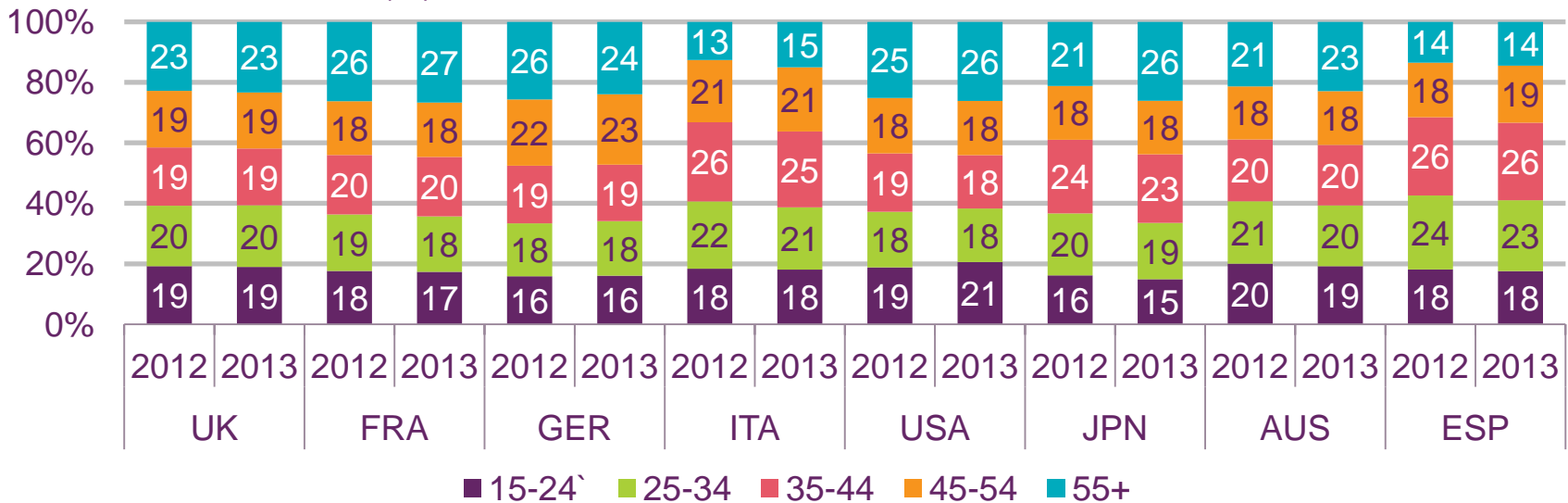


Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

# Figure 5.17

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

Share of online audience (%)

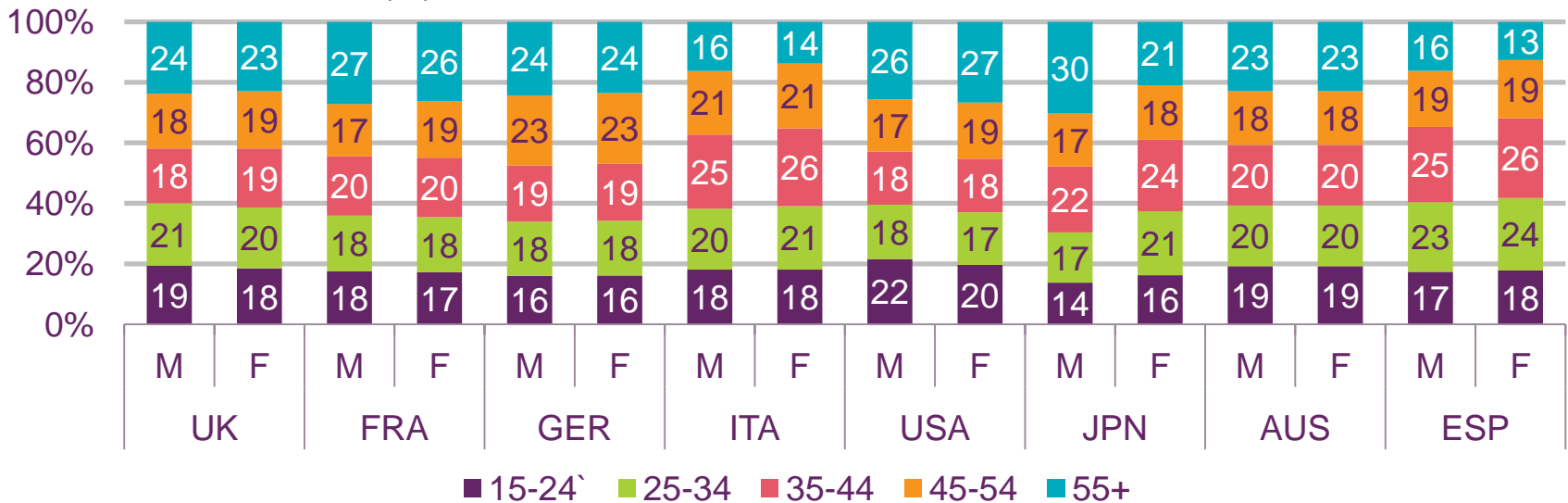


Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

# Figure 5.18

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

Share of online audience (%)

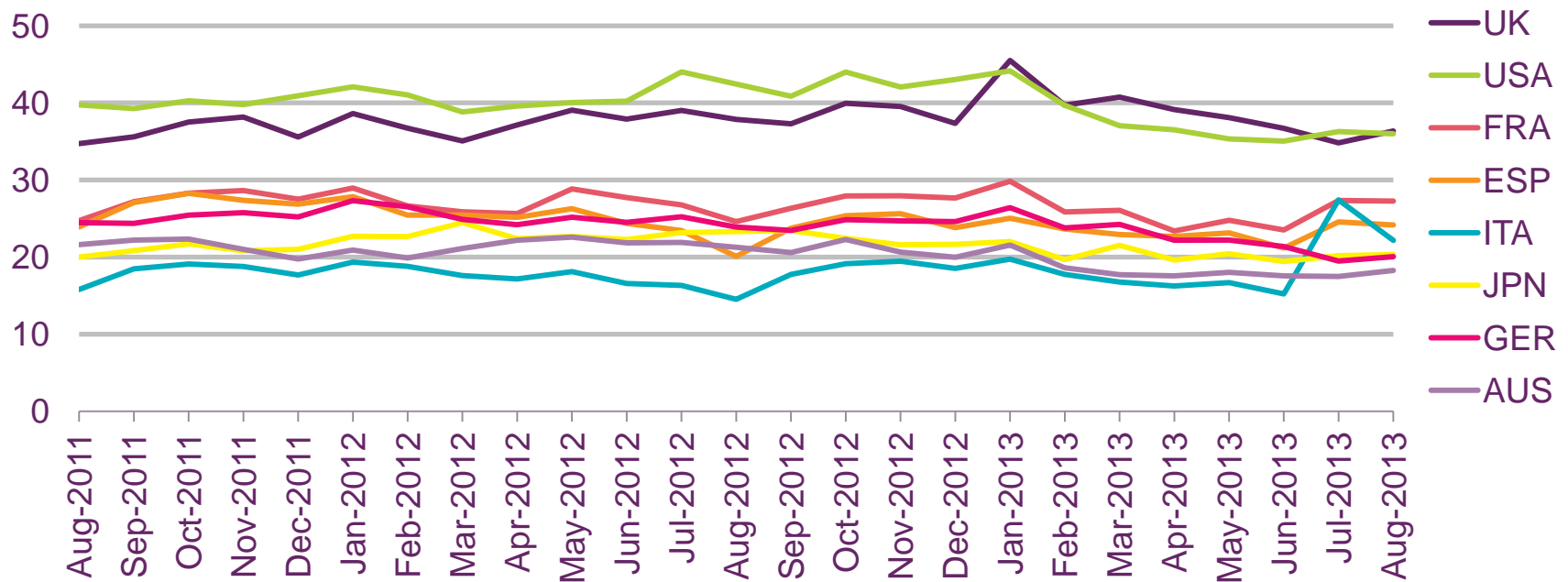


Source: comScore MMX, home and work panel, August 2012 and August 2013, persons 15+

# Figure 5.19

## Average time spent browsing on a laptop or desktop computer

Hours online per month



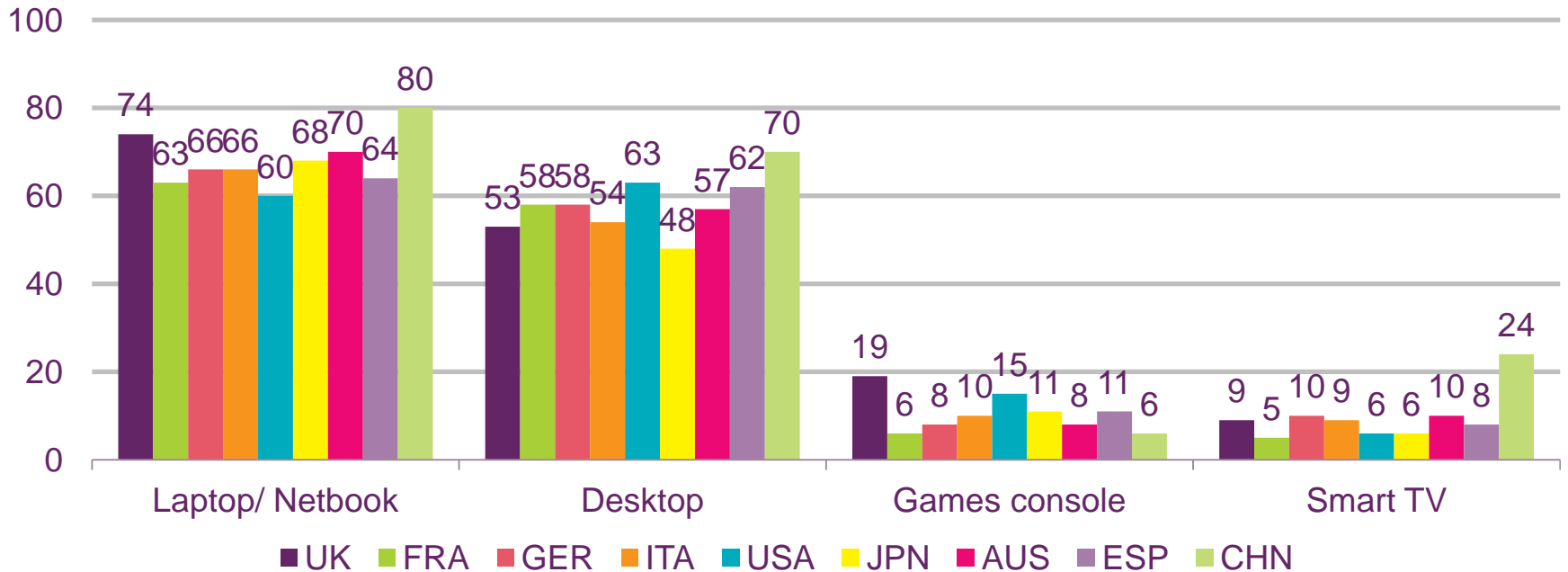
Source: comScore MMX, work and home panel, August 2011 to August 2013, persons 15+

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

# Figure 5.20

## Fixed devices used to access the internet

All respondents (%)



Source: Ofcom consumer research September 2013

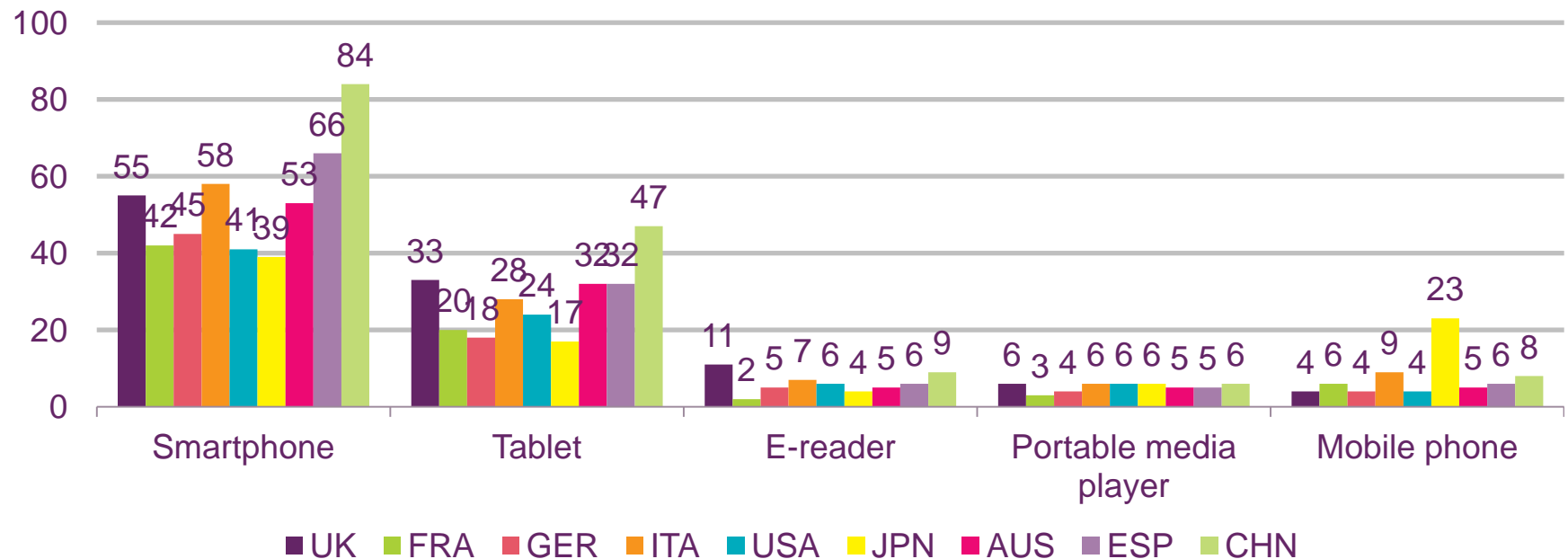
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.7a Which of the following devices do you use to access the internet?

# Figure 5.21

## Portable devices used to access the internet

All respondents (%)



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.

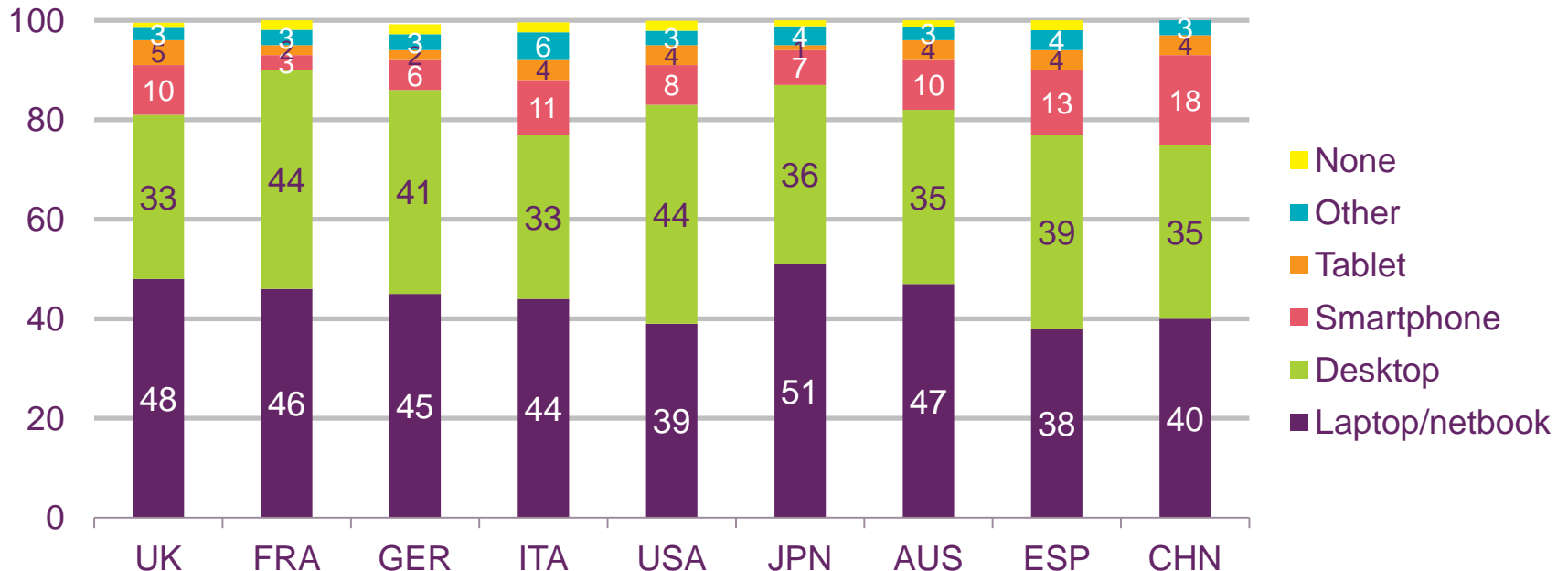
Q.7a Which of the following devices do you use to access the internet?



# Figure 5.22

## Most important device for accessing the internet

All respondents (%)



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

## Figure 5.23

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

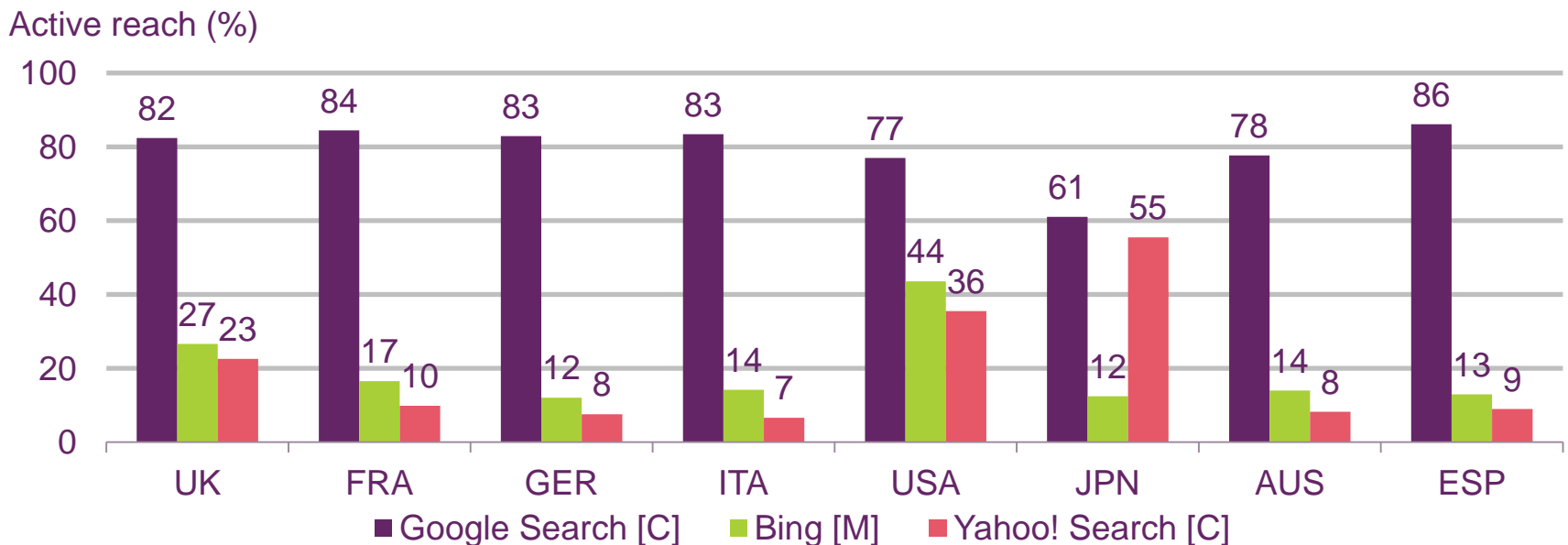
	UK	FRA	GER	ITA	USA	JPN	AUS	ESP
1	Google sites -	Google sites -	Google sites -	Google sites -	Yahoo! sites +2	Google sites +1	Google sites +1	Google sites -
2	Microsoft sites -	Microsoft sites -	eBay +1	Facebook -	Google sites -1	Yahoo! sites -1	Microsoft sites -1	Microsoft sites -
3	Facebook -	Facebook -	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.

## 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+

## Figure 5.25

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

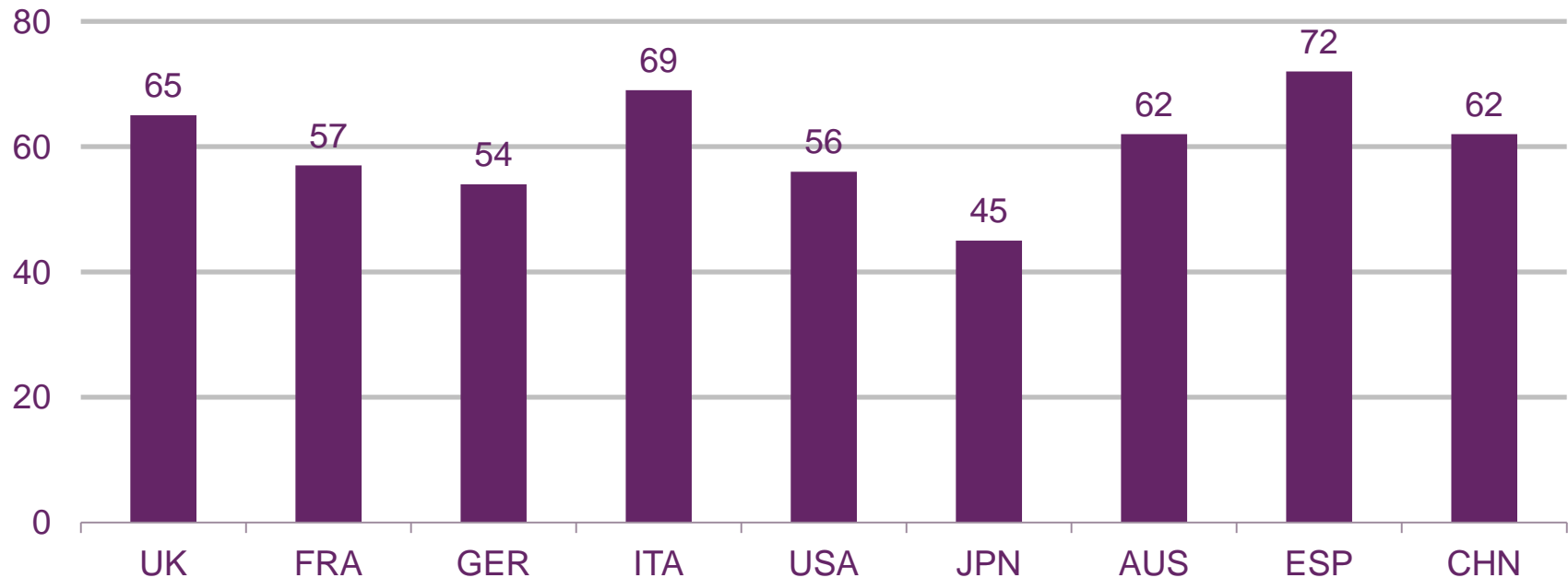
Country	1 <sup>ST</sup>	2 <sup>ND</sup>	3 <sup>RD</sup>	Largest increase
UK	facebook	bbc	google	instagram
FRA	facebook	bon coin	youtube	filmze
GER	facebook	ebay	google	samsung galaxy s3
ITA	facebook	libero	mail	ask
USA	facebook	google	you	instagram
CAN	facebook	google	youtube	instagram
JPN	yahoo	天気 <sup>1</sup>	youtube	パズドラ <sup>2</sup>
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 <sup>3</sup>	скачать <sup>4</sup>	вконтакте <sup>5</sup>	vk <sup>6</sup>
IND	facebook	songs	video	whatsapp
CHN	百度 <sup>7</sup>	是 <sup>8</sup>	草榴 <sup>9</sup>	百度一下 <sup>10</sup>

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,

## Figure 5.26

### Weekly access to social networking sites

All respondents %



Source: Ofcom consumer research September 2013

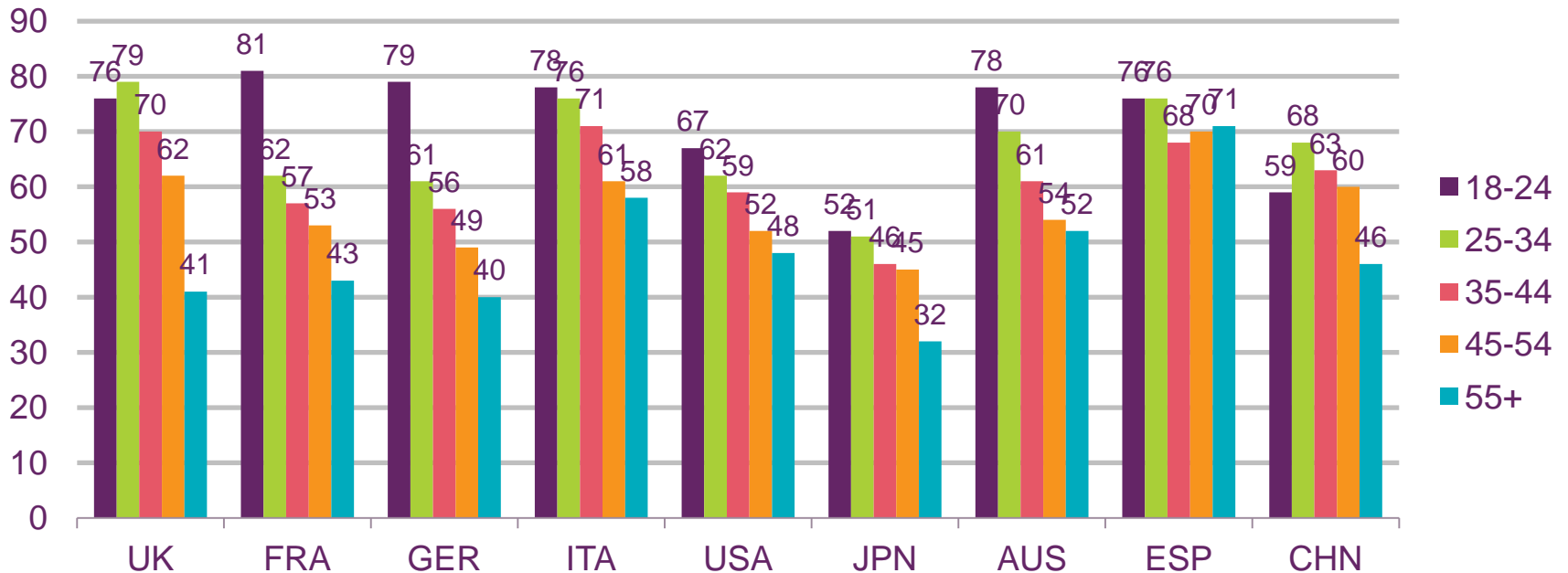
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

# Figure 5.27

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

All respondents (%)



Source: Ofcom consumer research September 2013

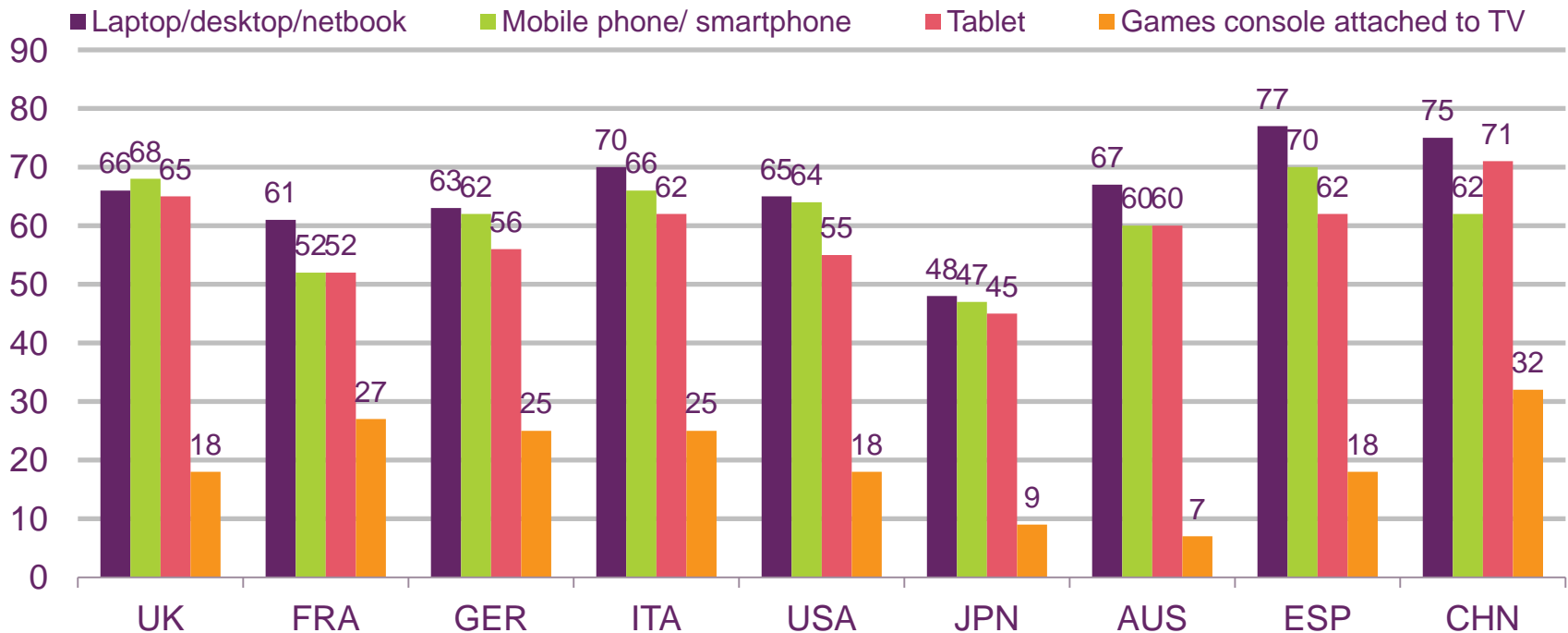
Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?

# Figure 5.28

## Accessing social networking sites, by device ownership

All respondents with each device (%)



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.

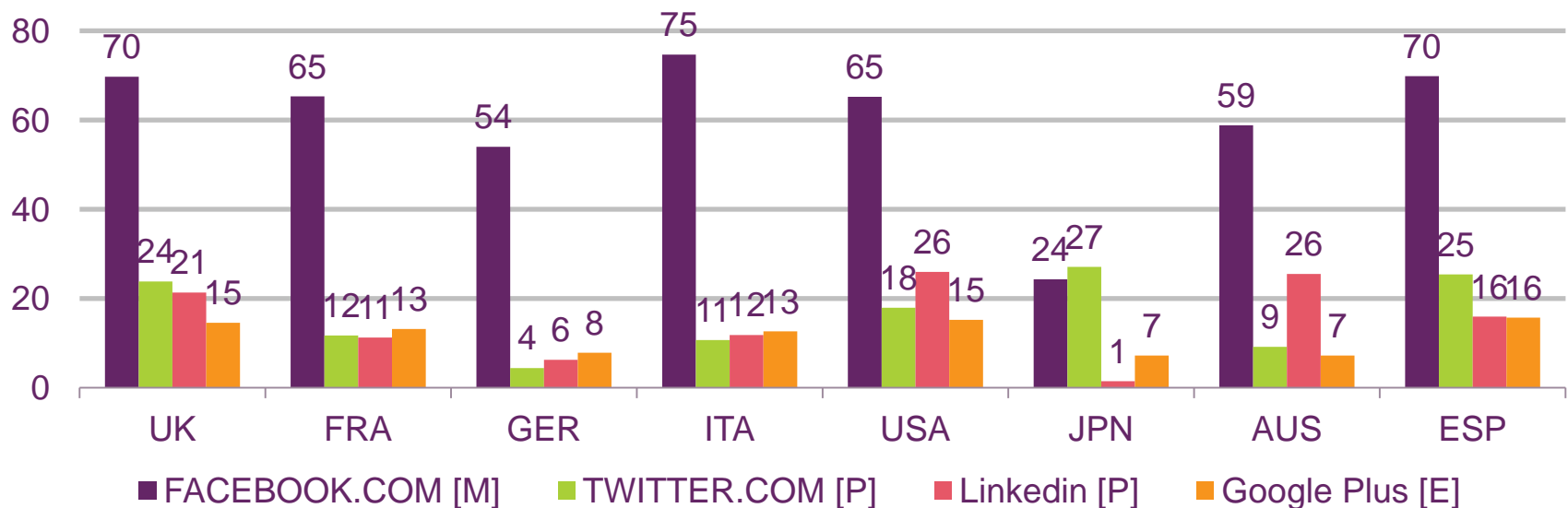
Q.9 Which, if any, of the following activities do you use your internet connection for at least once a week?



## Figure 5.29

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

Active reach (%)

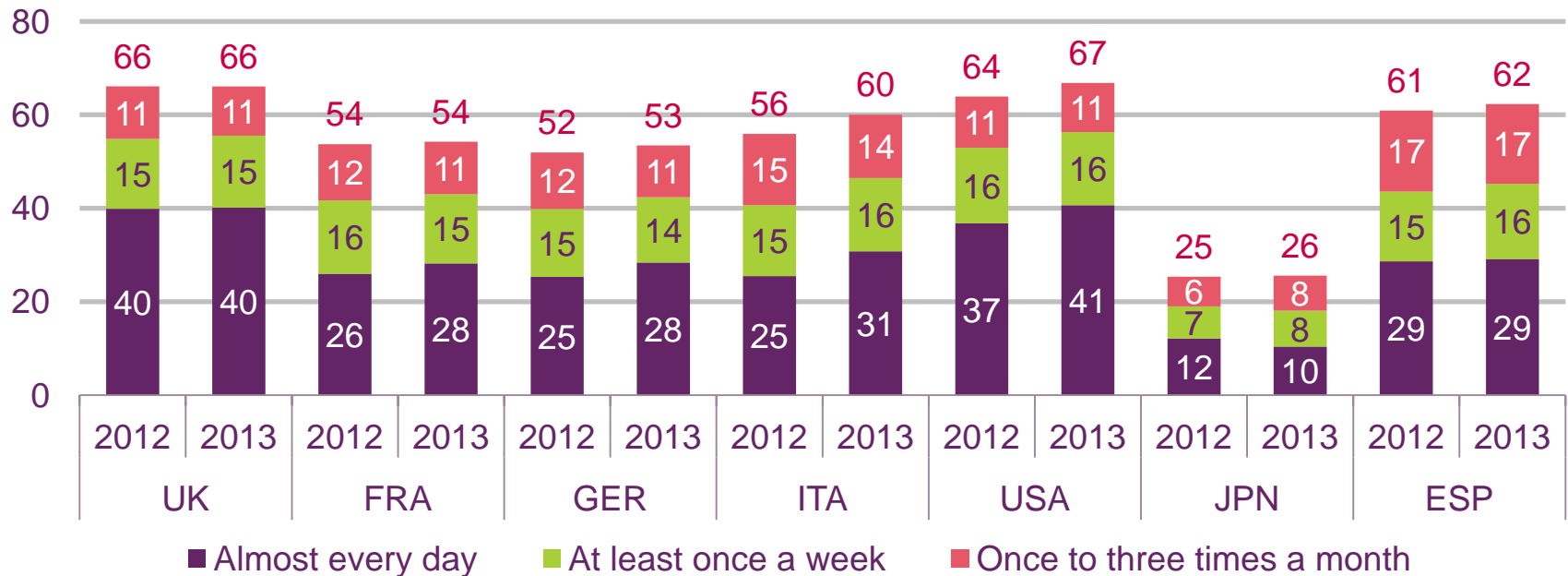


Source: comScore MMX, home and work panel, August 2013, persons 15+

# Figure 5.30

## Monthly accessing of social networking sites on mobile phones

Proportion of mobile internet users (%)

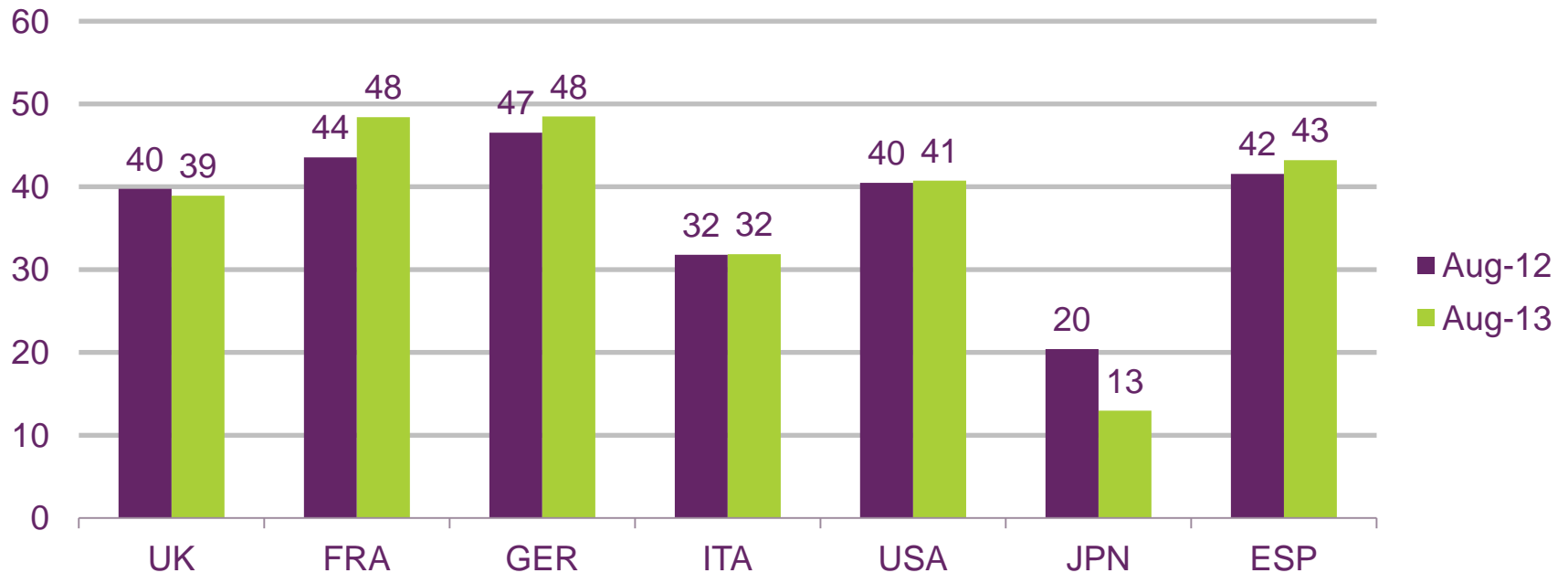


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

## Figure 5.31

### Use of social check-in services by mobile social networkers

Mobile social networkers (%)

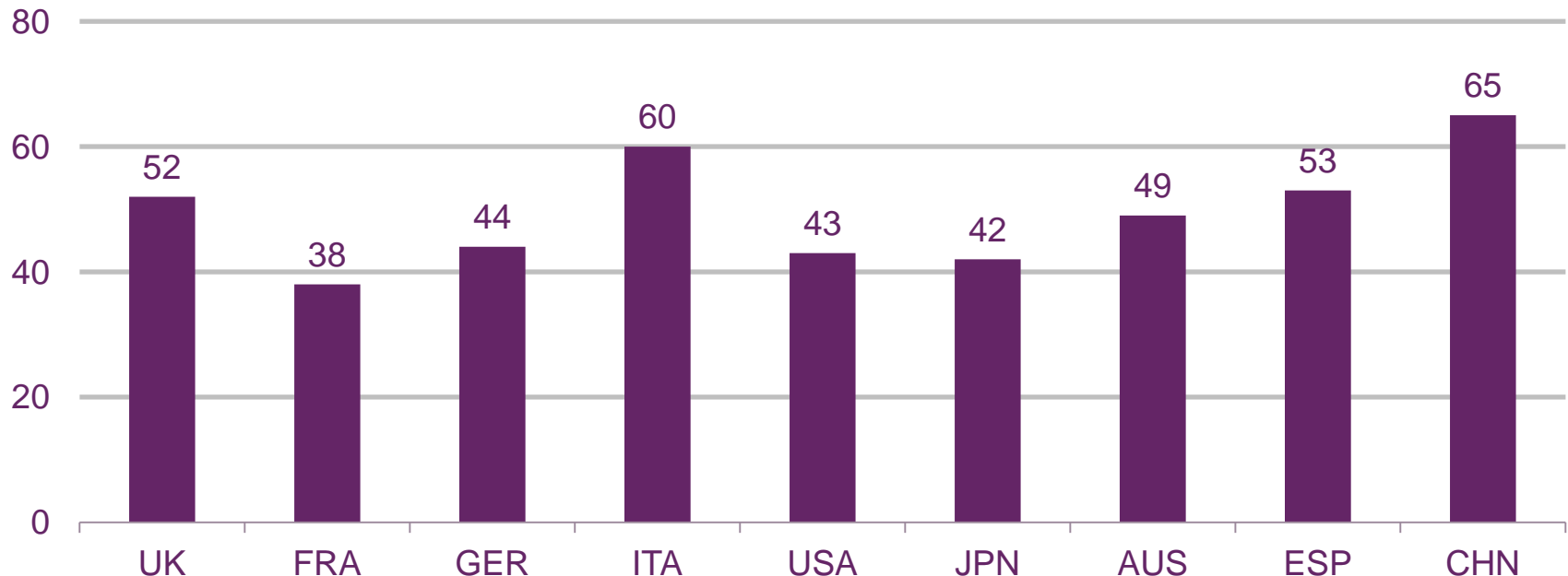


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile social networkers aged 13+

## Figure 5.32

### Weekly access of online video clips

All respondents (%)



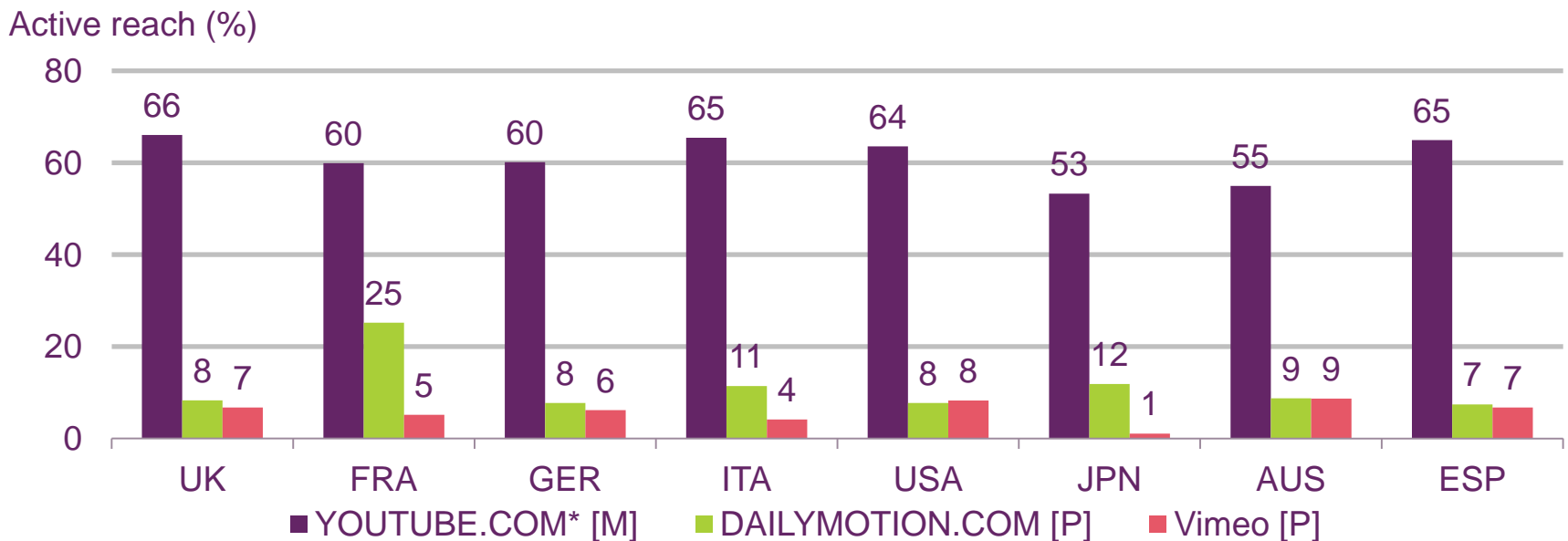
Source: Ofcom consumer research September 2013

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?

## Figure 5.33

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

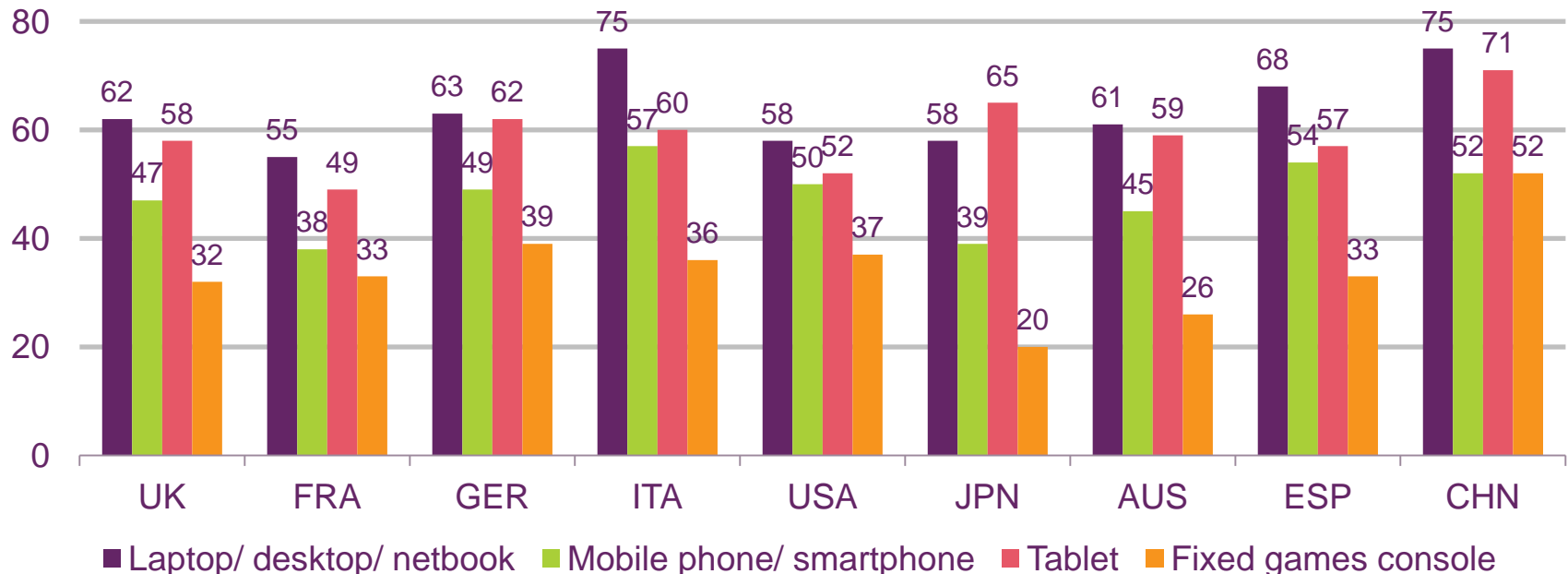


Source: comScore MMX, home and work panel, August 2013, persons 15+

# Figure 5.34

## Accessing online video clips, by device ownership

All respondents who access the internet with each device



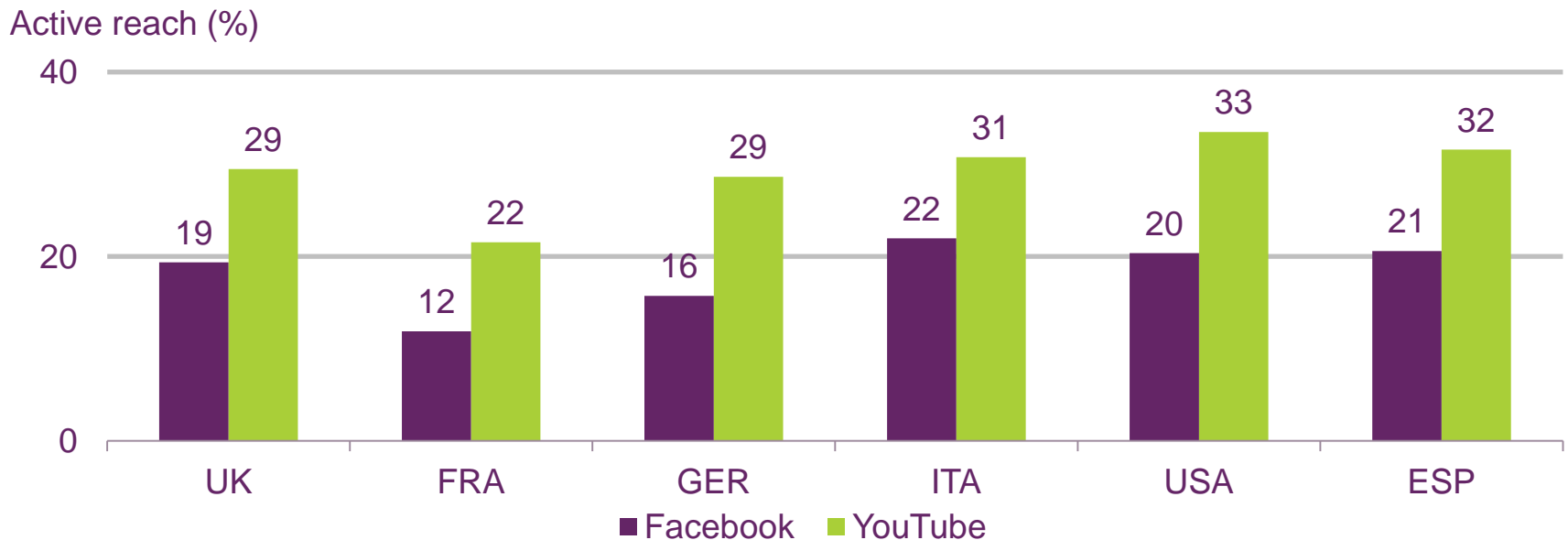
Source: Ofcom consumer research September 2013

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?

## Figure 5.35

Active reach of selected websites for viewing online video on mobile

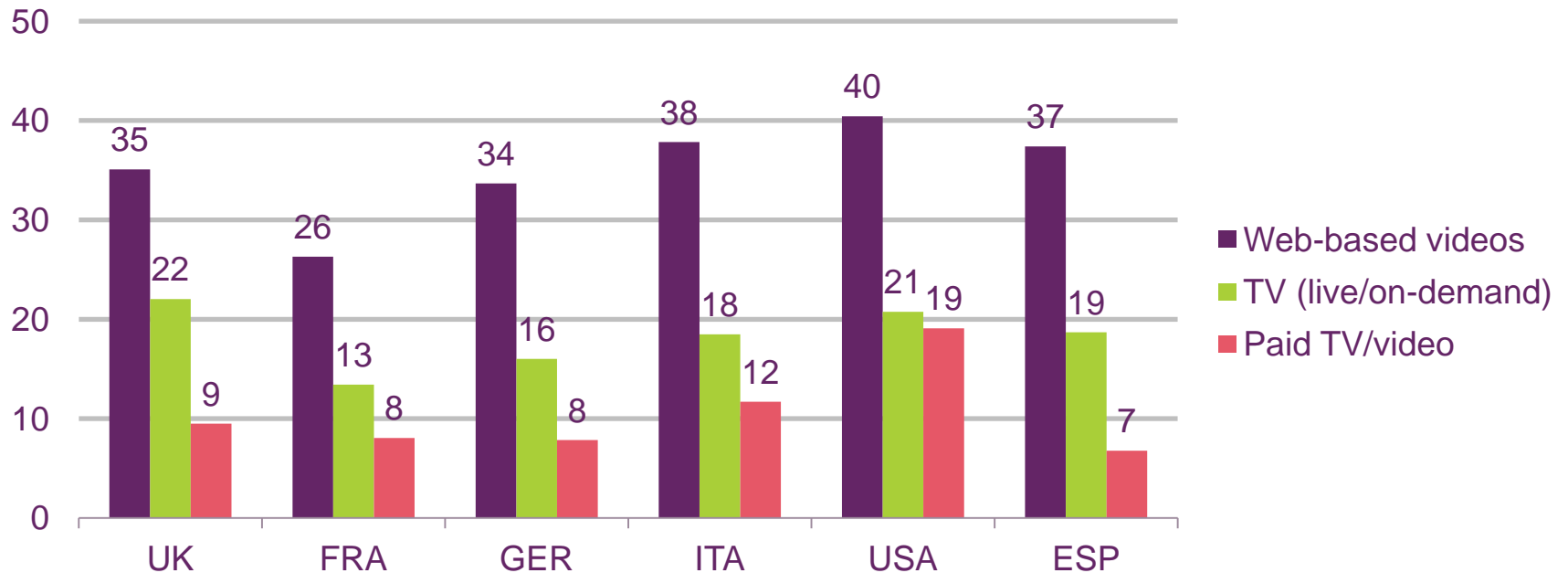


Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+

## Figure 5.36

### Type of TV/Video service accessed on mobile

Mobile internet users (%)



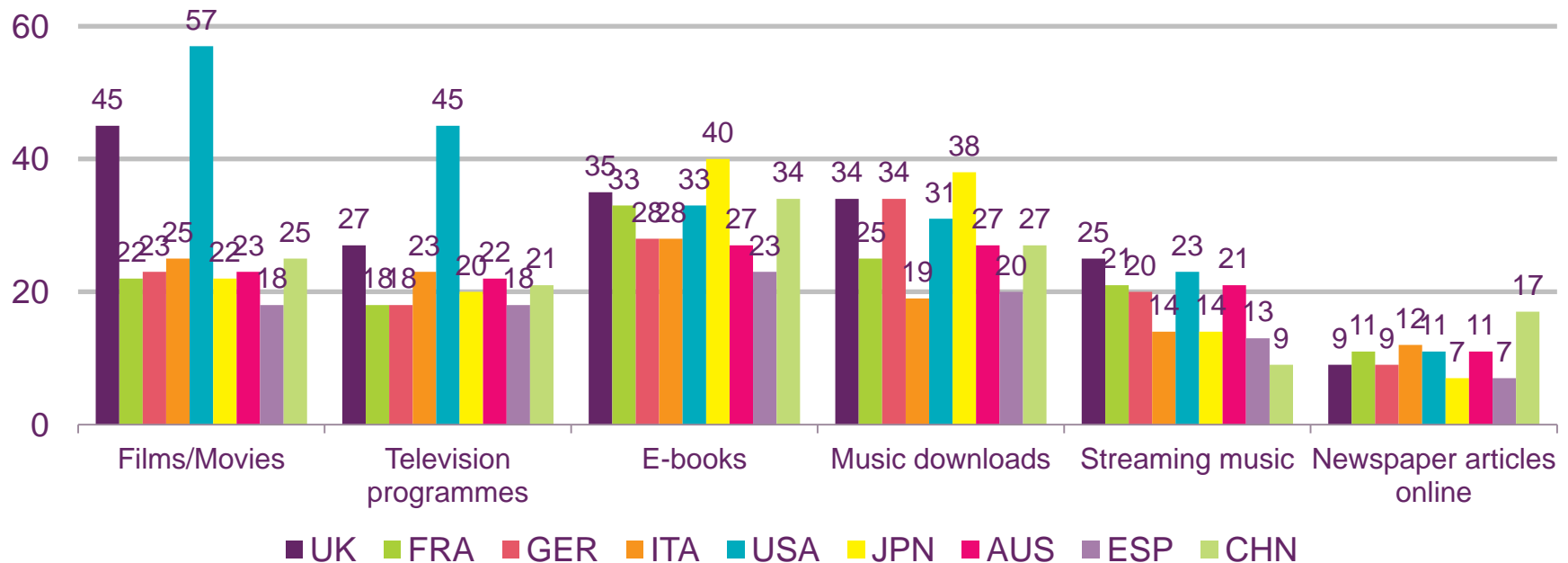
Source: comScore MobiLens, August 2013 (three-month average), mobile internet users aged 13+



# Figure 5.37

## Proportion of regular users who pay a subscription fee for access

All respondents who access content type weekly or more (%)



Source: Ofcom consumer research September 2013

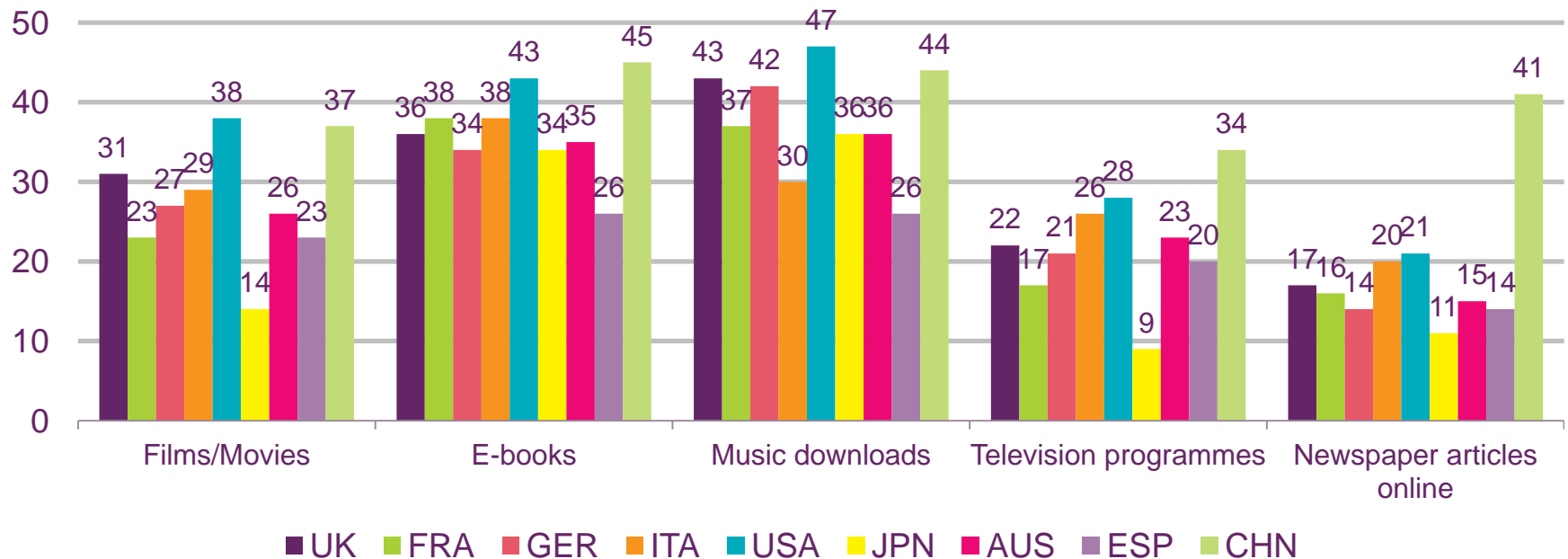
Base: All respondents who access films/ movies online 221-655, who access TV programmes online 309-804, who stream music online 205-877, who download music 110-622, who access newspaper articles online 506-728, who access e-books online 80-600

Q.13b Do you pay a subscription fee to access any of this content online?

# Figure 5.38

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

All respondents who access content type weekly or more (%)



Source: Ofcom consumer research September 2013

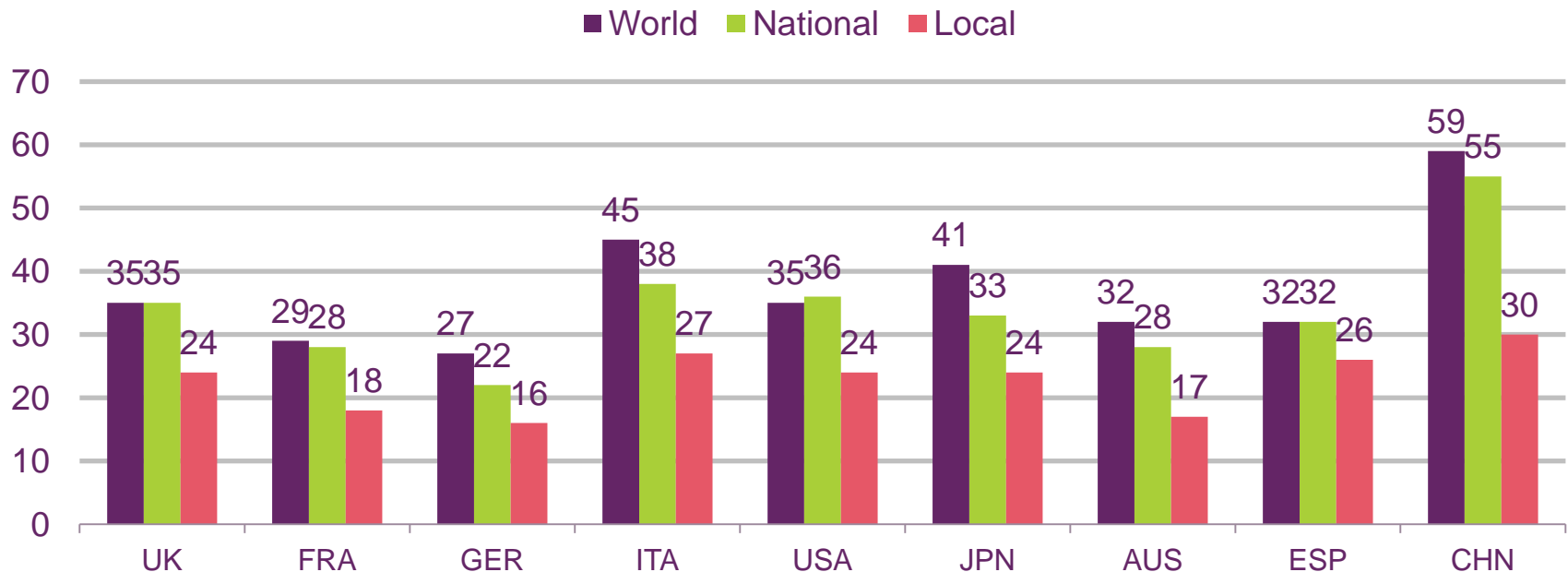
Base: All respondents who access films/ movies online 221-655, who access TV programmes online 309-804, who stream music online 205-877, who download music 110-622, who access newspaper articles online 506-728, who access e-books online 80-600

Q.13c Excluding any subscriptions, how often, if at all, do you buy or rent any of this content online?

# Figure 5.39

## The internet as a primary source of news

Proportion of respondents claiming internet was their primary source of world/national/local 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?