Figure 4.1

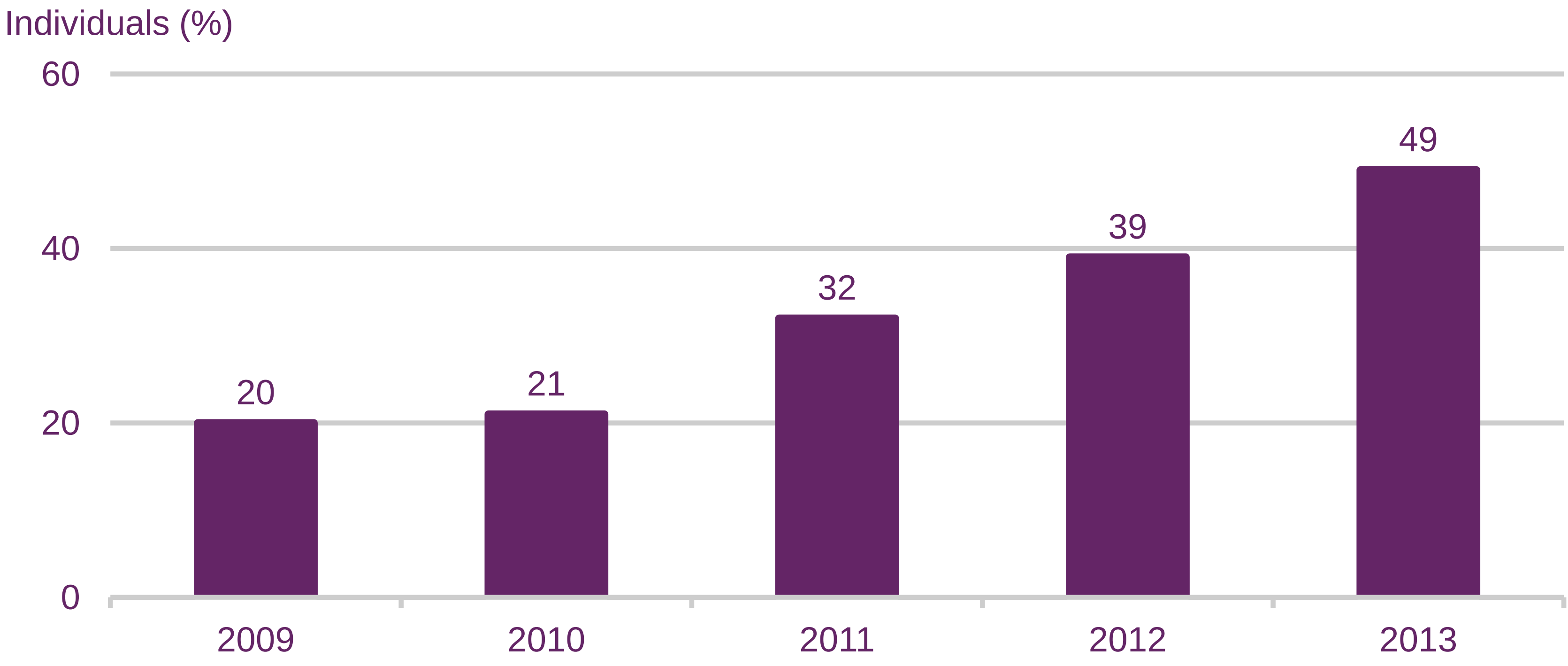
UK internet and web-based content market: key statistics

UK internet and web-based content marketAisha	2008	2009	2010	2011	2012	2013
[1]Internet take-up (%)	67	73	75	77	79	80
[1]Internet on mobile-phone take-up (%)	n/a	20	21	32	39	49
[2]Monthly active audience on laptop/desktop computers	35.0m	38.6m	43.1m	42.2m	43.6m	n/a
[2]Time spent web browsing per laptop/desktop internet user per month (hours)	30.1	29.4	30.9	31.5	34.7	n/a
[3]Internet advertising expenditure (£)	3.4bn	3.5bn	4.1bn	4.8bn	5.4bn	n/a
[3]Mobile advertising revenue (£)	29m	38m	83m	203m	526m	n/a

Source: [1]Ofcom consumer research, Q1 each year, [2]comScore MMX, UK, annual average from reported monthly values; [3]Internet Advertising Bureau/PwC.
Note:Change in comScore methodology effects values from February 2011 onwards.

Figure 4.2

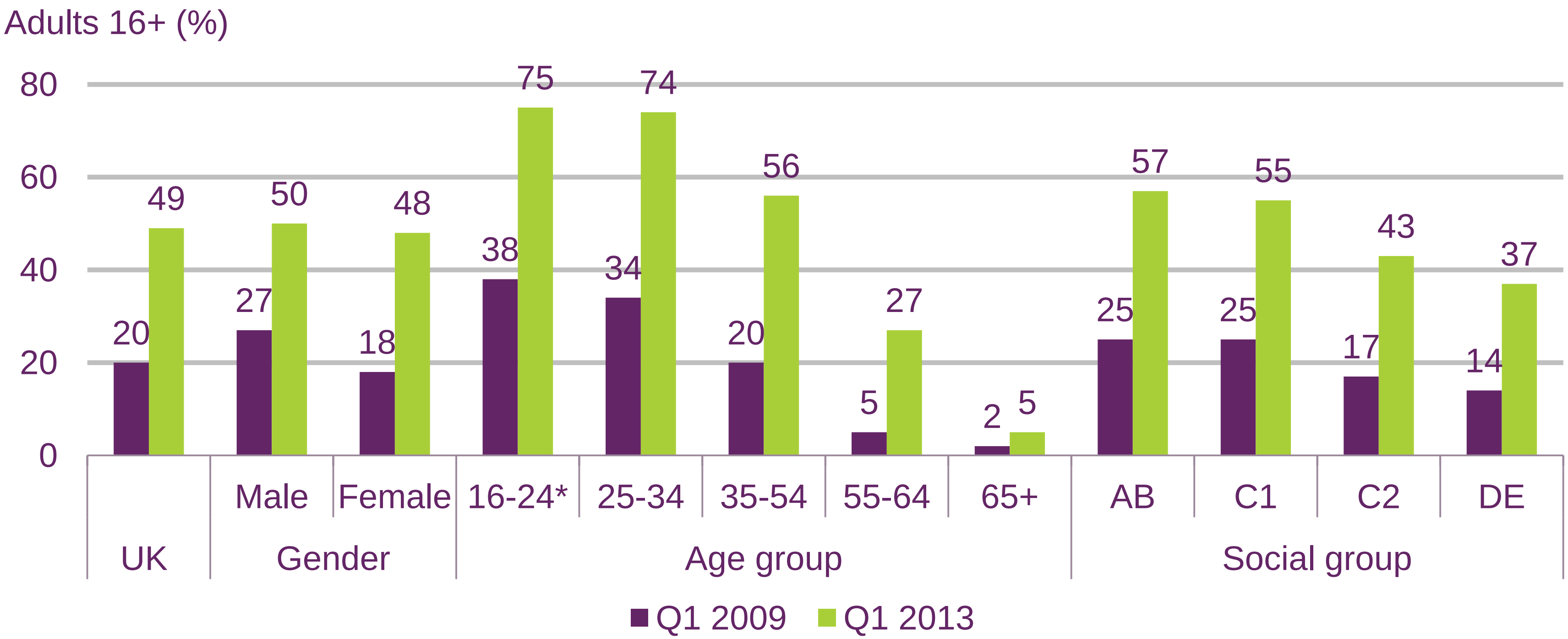
Take-up of mobile phone internet access



Source: Ofcom research, data as at Q1 of each year
Base: All adults aged 16+

Figure 4.3

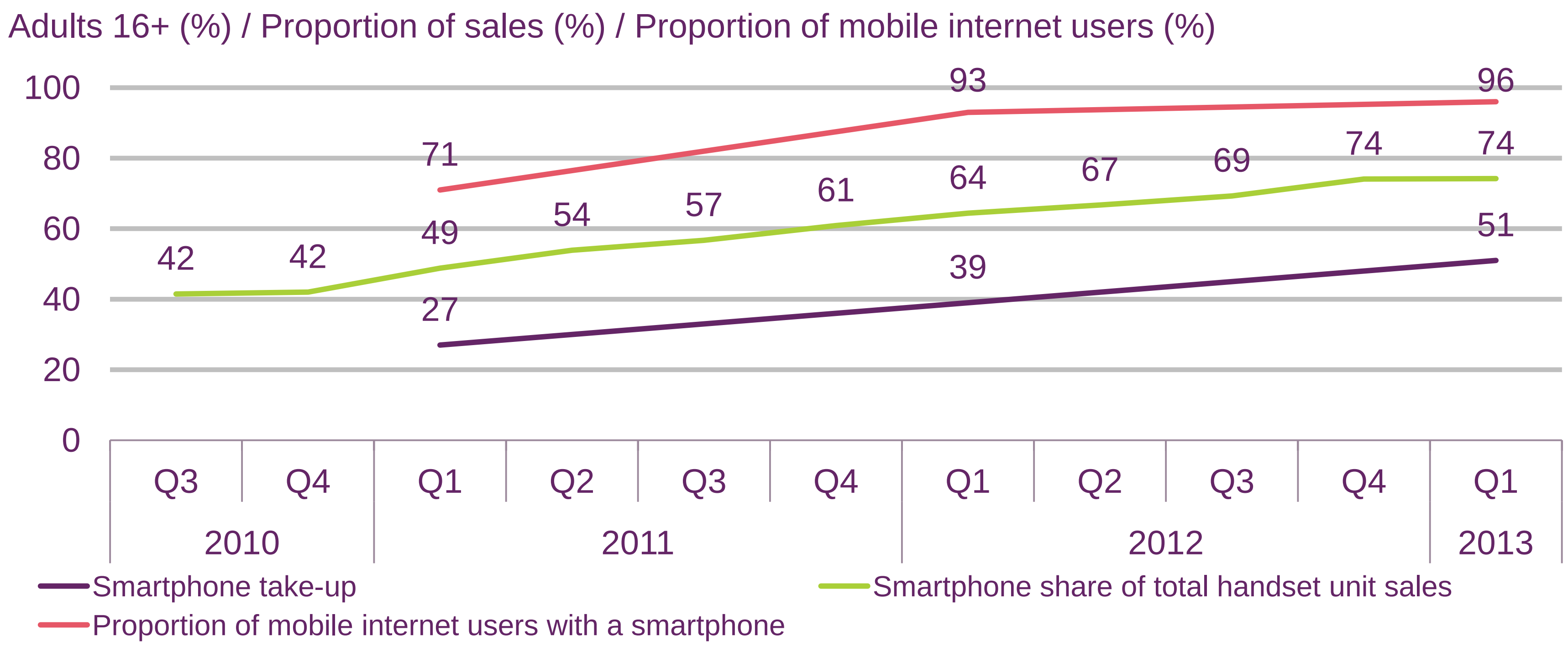
Mobile internet users by gender, age and social group: 2009 vs 2013



Source: Ofcom Consumer Research Q1 2009 and Q1 2013
Base: All adults aged 16+, Q1 2009 n=5273, Q1 20103 n=3750
Note: *15-24 for Q1 2009 data

Figure 4.4

Smartphones: take-up, share of handset sales and mobile internet use



Source: GfK / Ofcom Consumer Research

Figure 4.5

Top 10 internet properties accessed by mobile, and laptop/desktop audiences

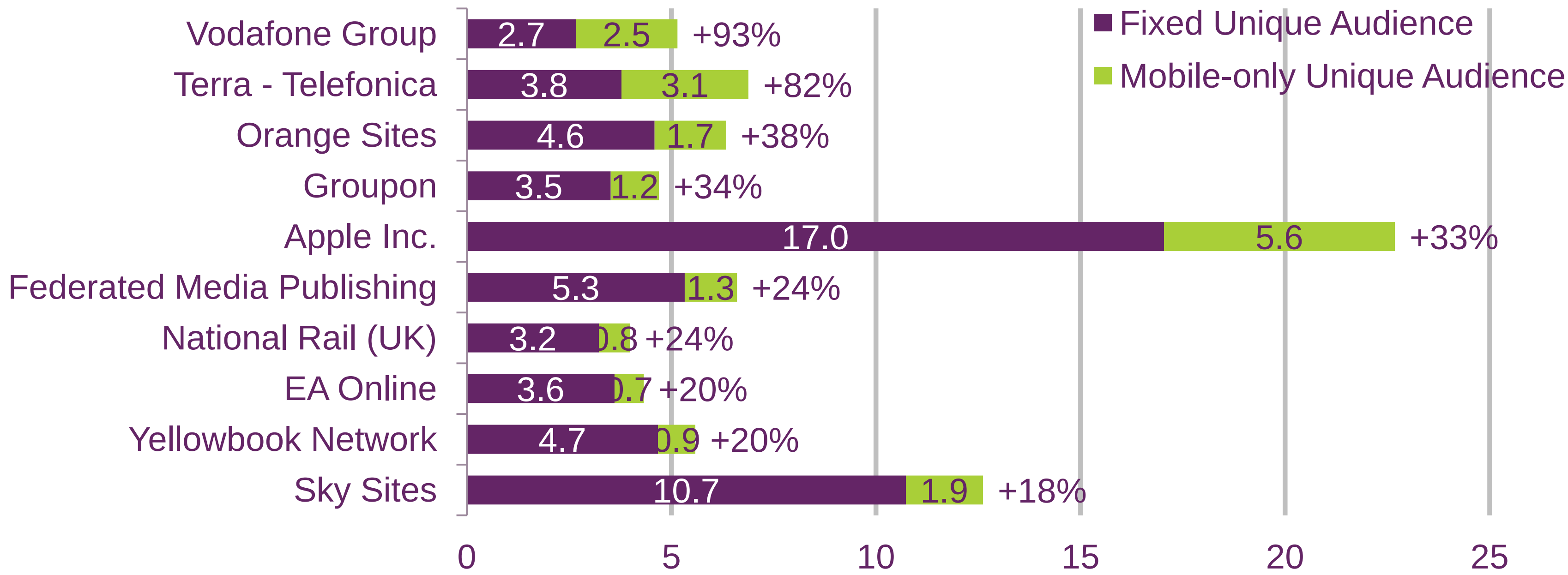
Mobile audience		Desktop and laptop audience	
Google Sites	17.1m	Google Sites	40.0m
Facebook	9.1m	Microsoft Sites	33.2m
BBC Sites	6.5m	Facebook	30.2m
Yahoo! Sites	5.6m	Yahoo! Sites	24.9m
Wikimedia Foundation Sites	5.4m	Amazon Sites	24.5m
Amazon Sites	4.5m	BBC Sites	23.6m
Terra – Telefonica	3.9m	eBay	22.5m
Glam Media	3.9m	Wikimedia Foundation Sites	21.4m
Microsoft Sites	3.4m	Glam Media	20.8m
Vodafone Group	3.0m	Apple Inc.	17.0m

Source: comScore GSMA MMM, UK, browser access only, on network, April 2013; comScore MMX, UK, home and work panel, April 2013

Figure 4.6

Internet properties with the greatest proportional increase in total unique audience through mobile

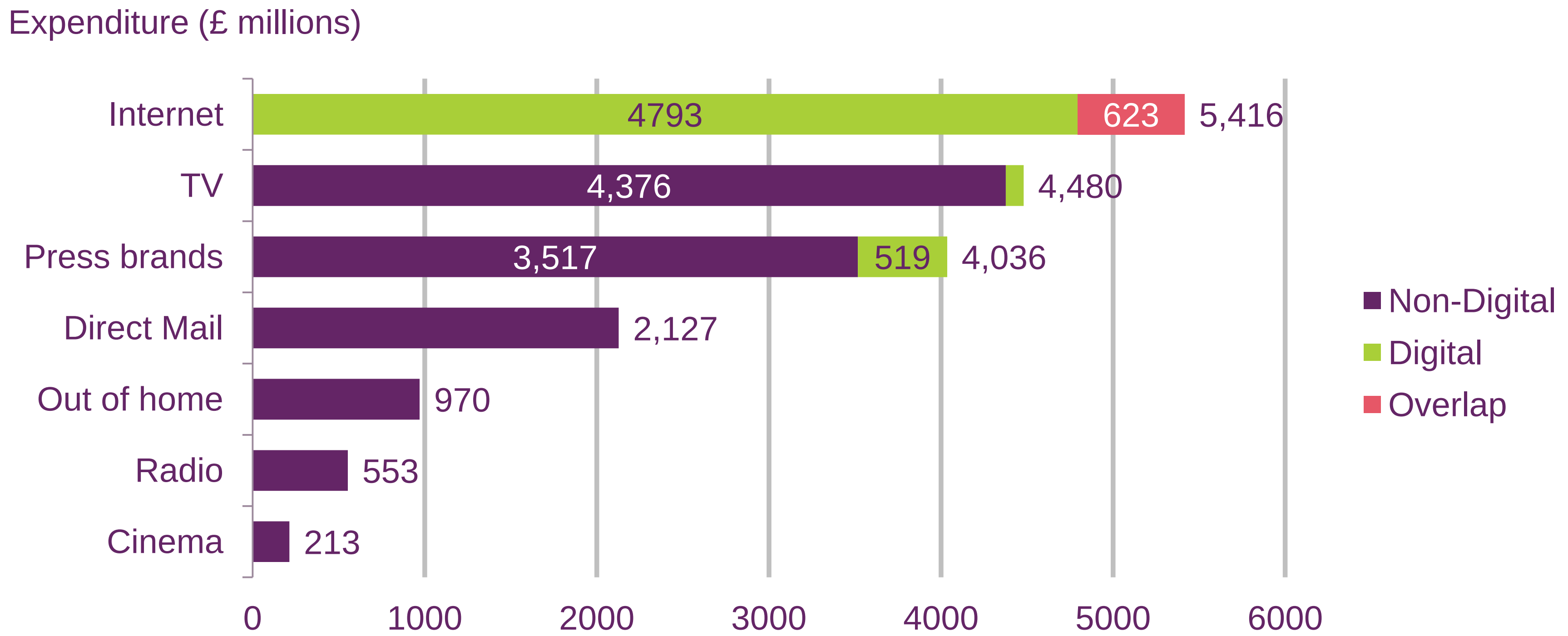
Unique audience (millions)



Source: comScore MMX Multi-Platform, UK, April 2013
Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network mobile browsing usage.

Figure 4.7

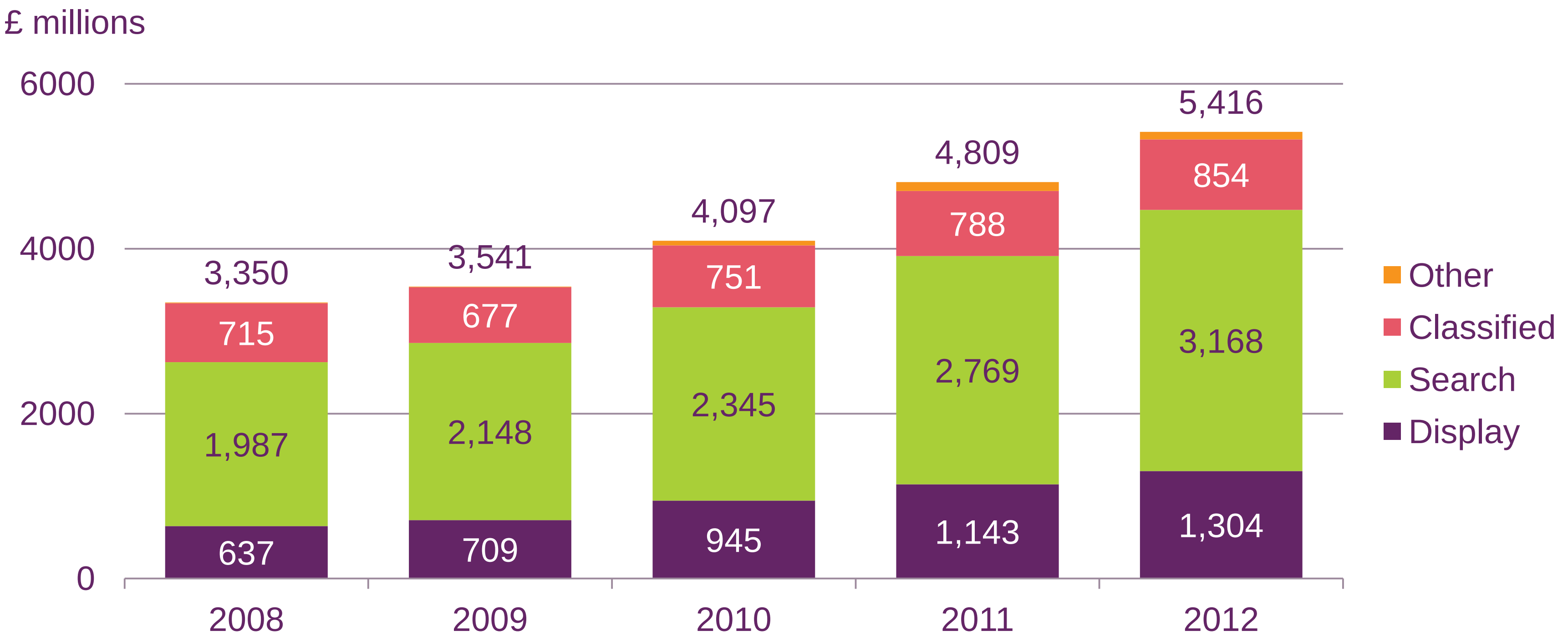
UK advertising expenditure 2012



Source: AA/Warc Advertising Expenditure Report 2013, http://expenditurereport.warc.com/
Note: Press brands is a consolidation of magazine brands and national and regional newsbrands. Digital TV spend is broadcaster VOD revenue. Overlap is the sum of digital spend across other sectors. To arrive at the total UK adspend of £17,172m, sum the end of bar totals and deduct the overlap.

Figure 4.8

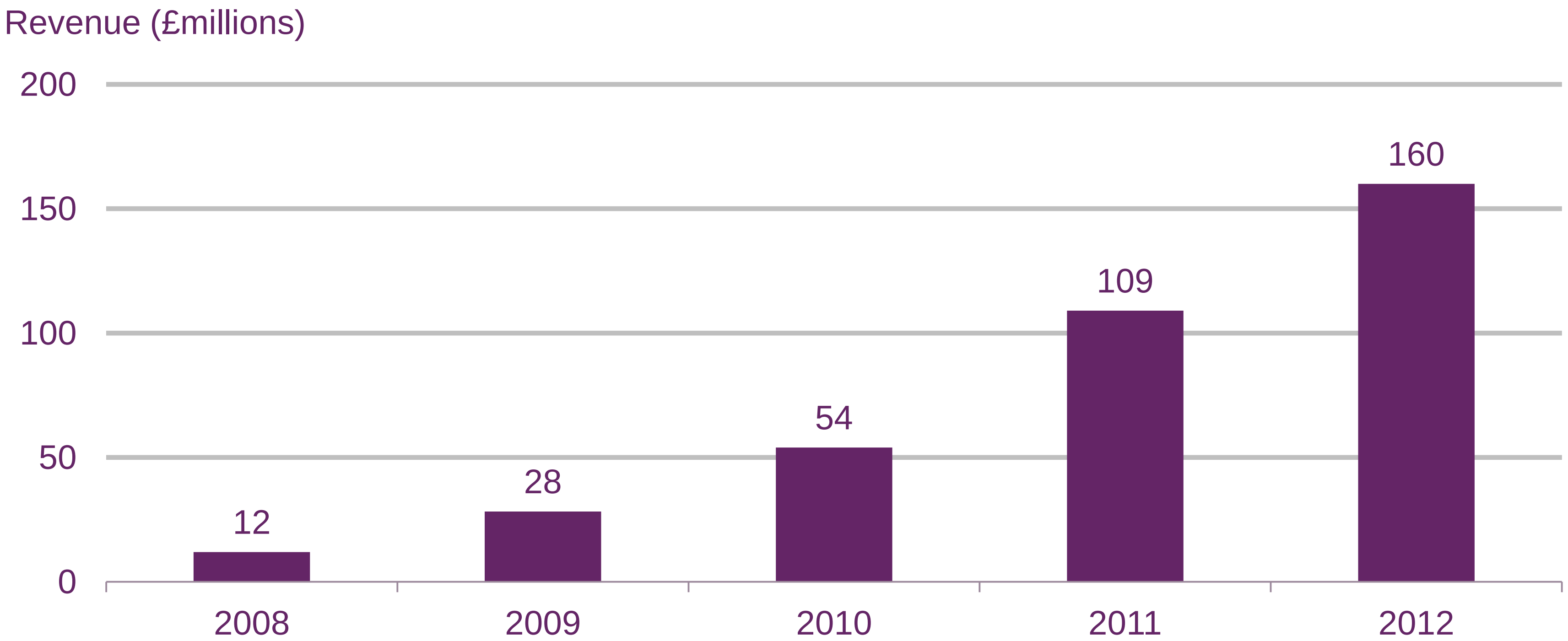
Digital advertising expenditure, by type: 2008 - 2012



Source: IAB / PwC Digital Adspend 2008 – 2012

Figure 4.9

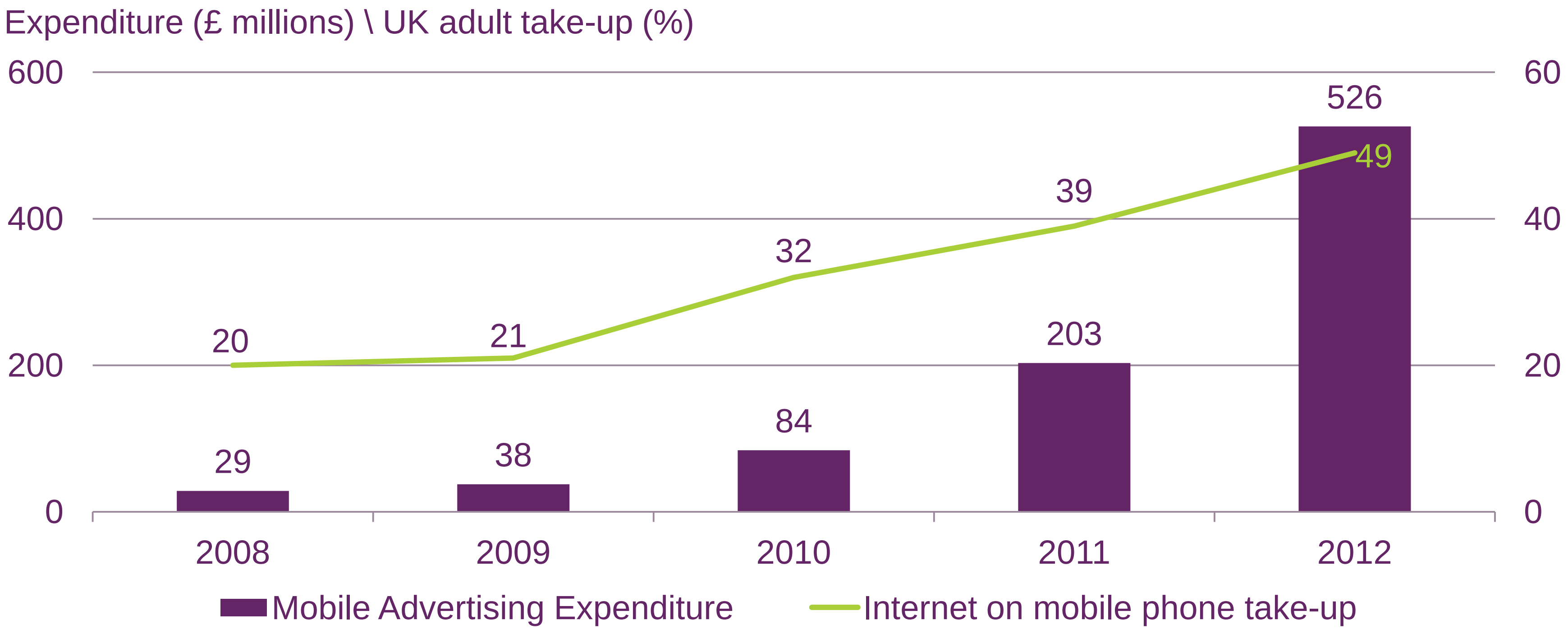
Video display advertising revenue: 2008-2012



Source: IAB / PwC Digital Adspend 2008 – 2012

Figure 4.10

Mobile advertising expenditure, and mobile internet take-up



Source: IAB / PwC Digital Adspend 2008 – 2012; Ofcom consumer research.
Note: Take-up figures are from Q1 of the following year.

Figure 4.11

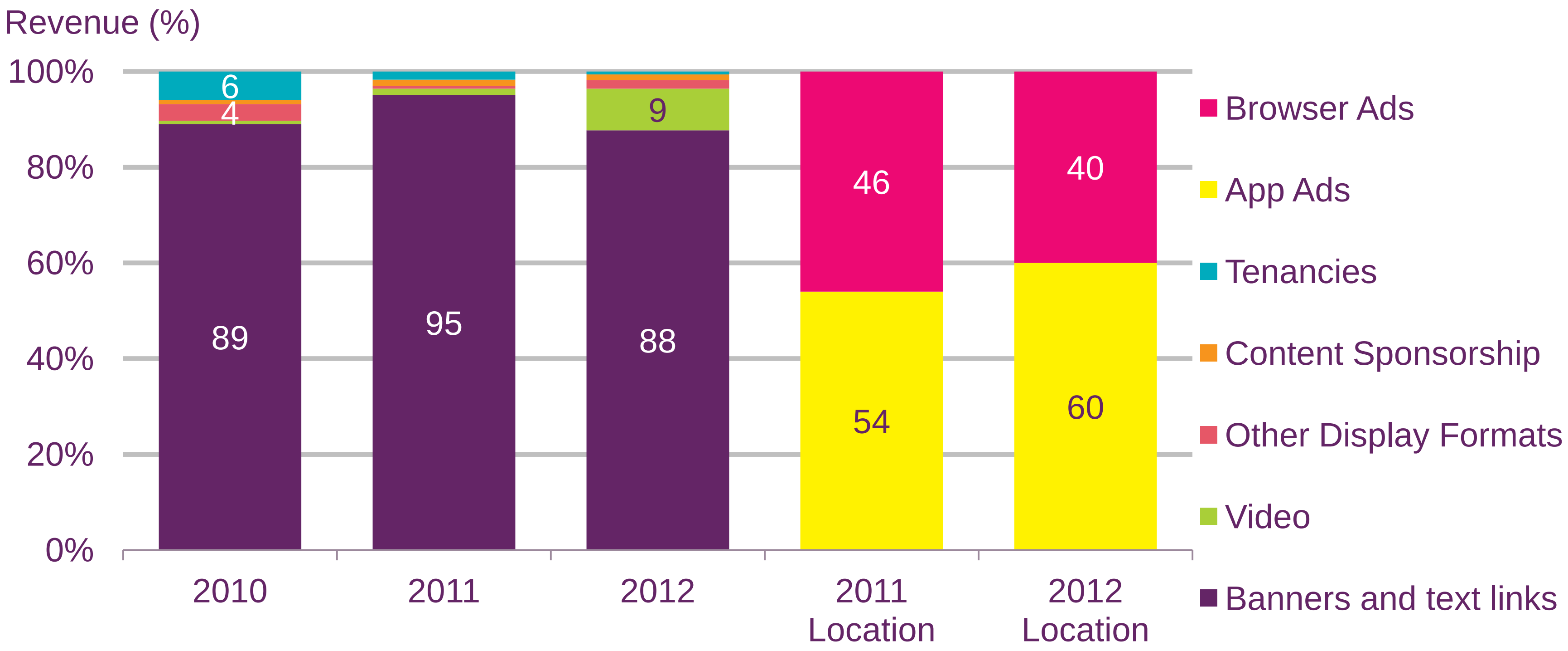
Mobile advertising, by type, 2008-2012

Share of revenues (%)

Source: IAB / PwC Digital Adspend 2008 – 2012

Figure 4.12

Mobile display advertising revenues, by type and location: 2010- 2012

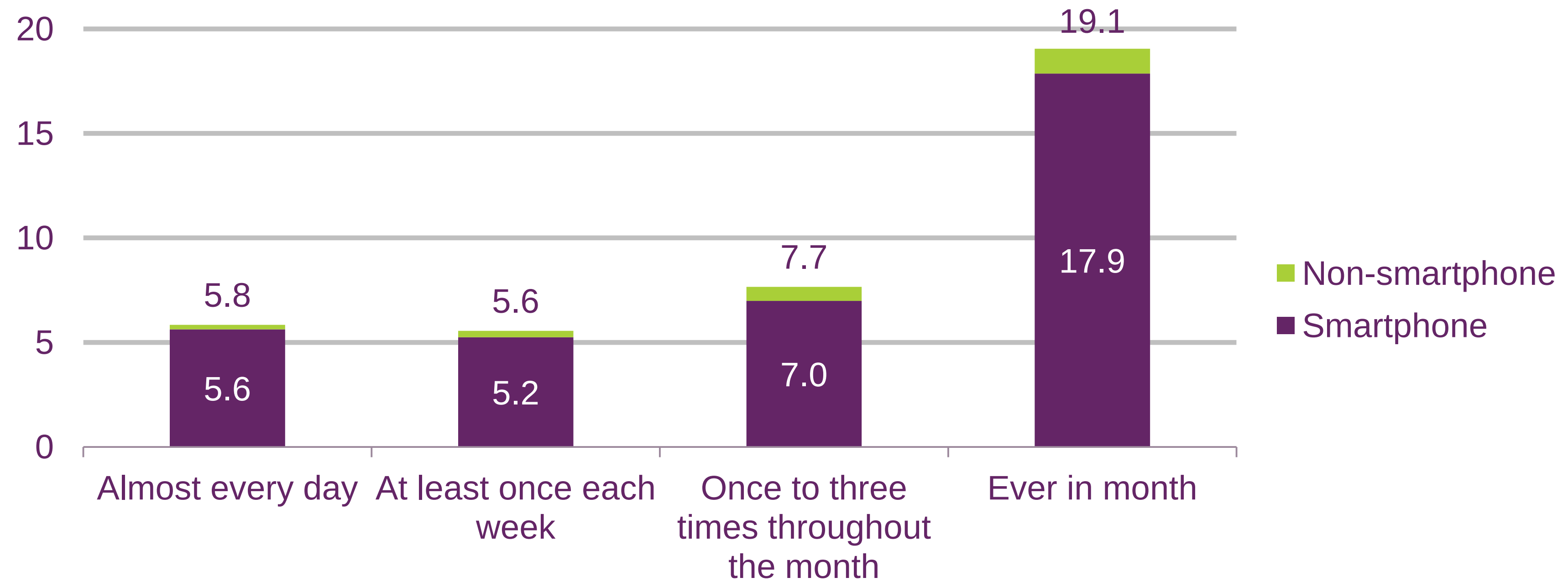


Source: IAB / PwC Digital Adspend 2008 – 2012

Figure 4.13

Frequency with which mobile phone users recall seeing mobile advertising

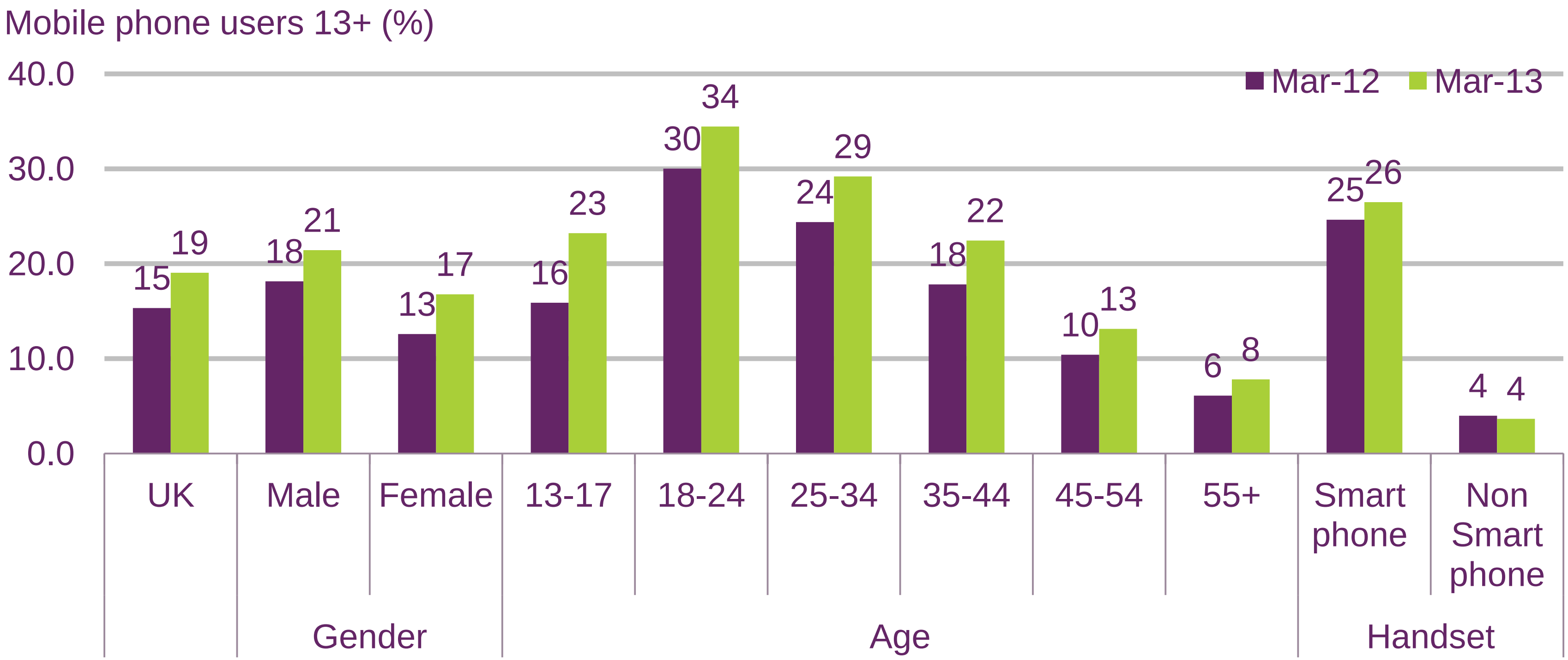
Mobile phone users 13+ (%)



Source: comScore MobiLens, UK, 3 month average ending March 2013

Figure 4.14

Gender, age and handset of those who recall mobile advertising

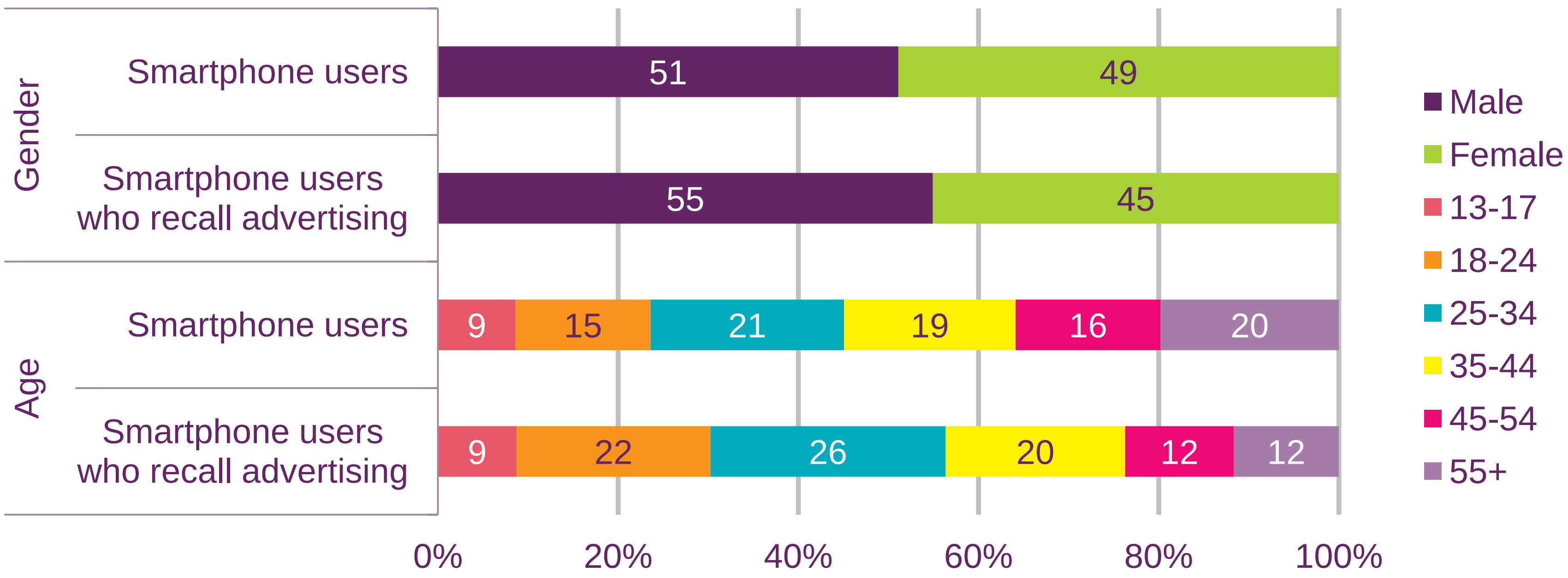


Source: comScore MobiLens, UK, 3 month average ending March 2012 and March 2013

Figure 4.15

Profile of smartphone users that recall mobile advertising

Smartphone users 13+ (%)

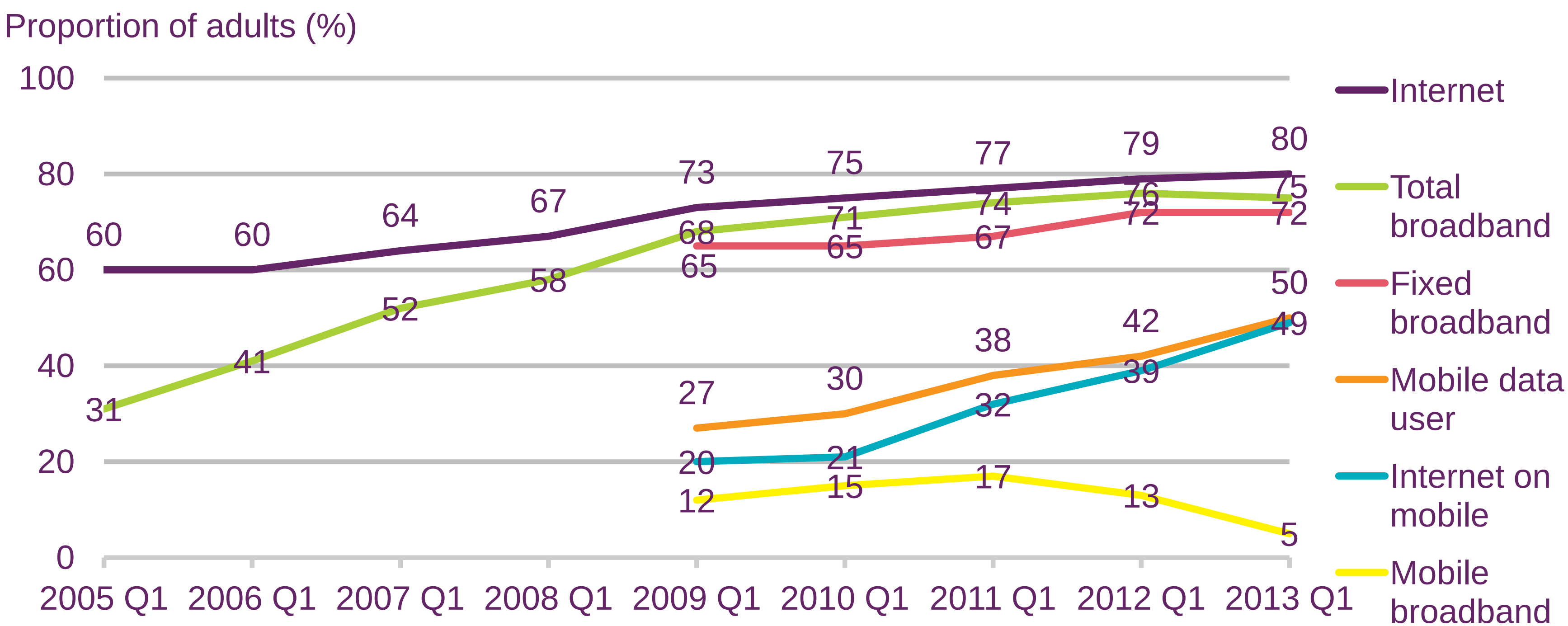


Source: comScore MobiLens, UK, 3 month average ending March 2013

4.2 INTERNET AND DEVICES

Figure 4.16

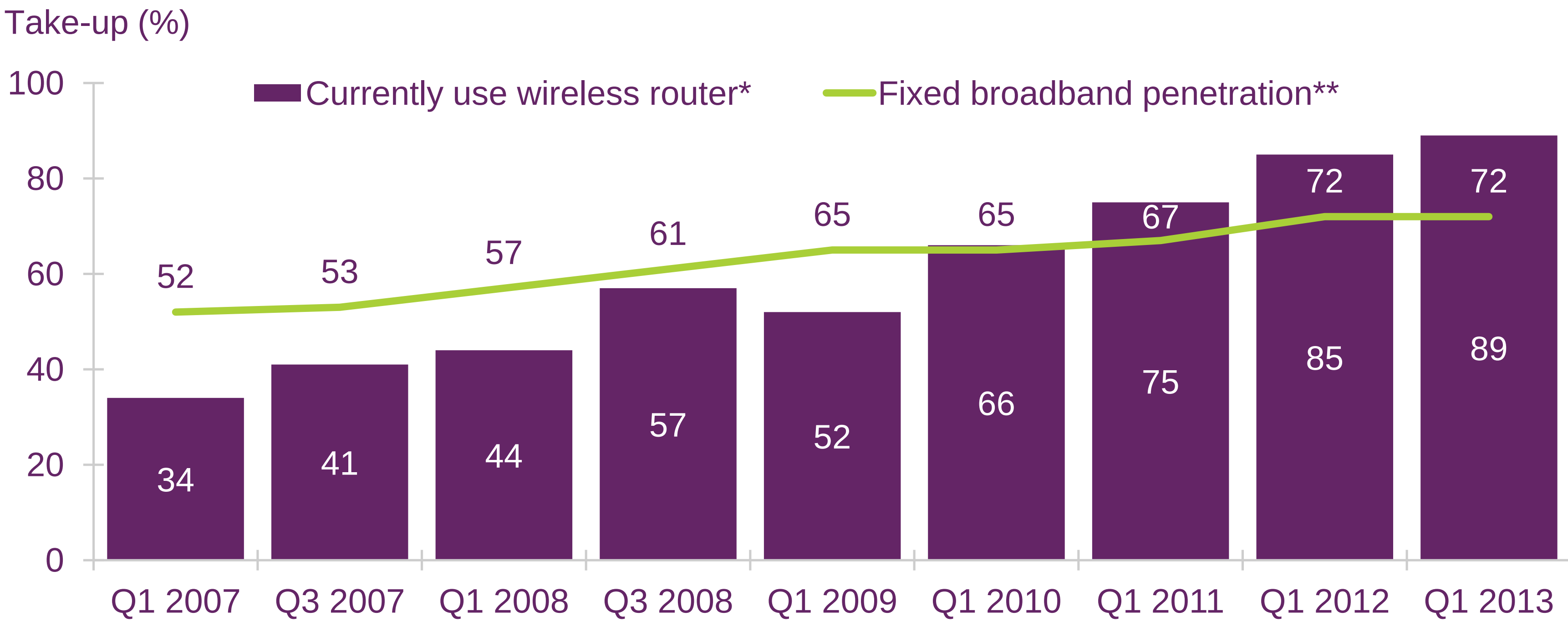
Household internet access: 2005-2013



Source: Ofcom technology tracker, Q1 2012. Base: All adults aged 16+ (n=3772). Note 1: “Internet on mobile” is the % of adults who use a mobile phone for any of the following activities: Instant messaging, Downloading Apps or programs, Email, Internet access, downloading video, video streaming, visiting social networking sites. Note 2: From,Q1 2009 the ‘Internet’ figure includes those who access the internet on mobile phones. QE2: Do you or does anyone in your household have access to the Internet/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?

Figure 4.17

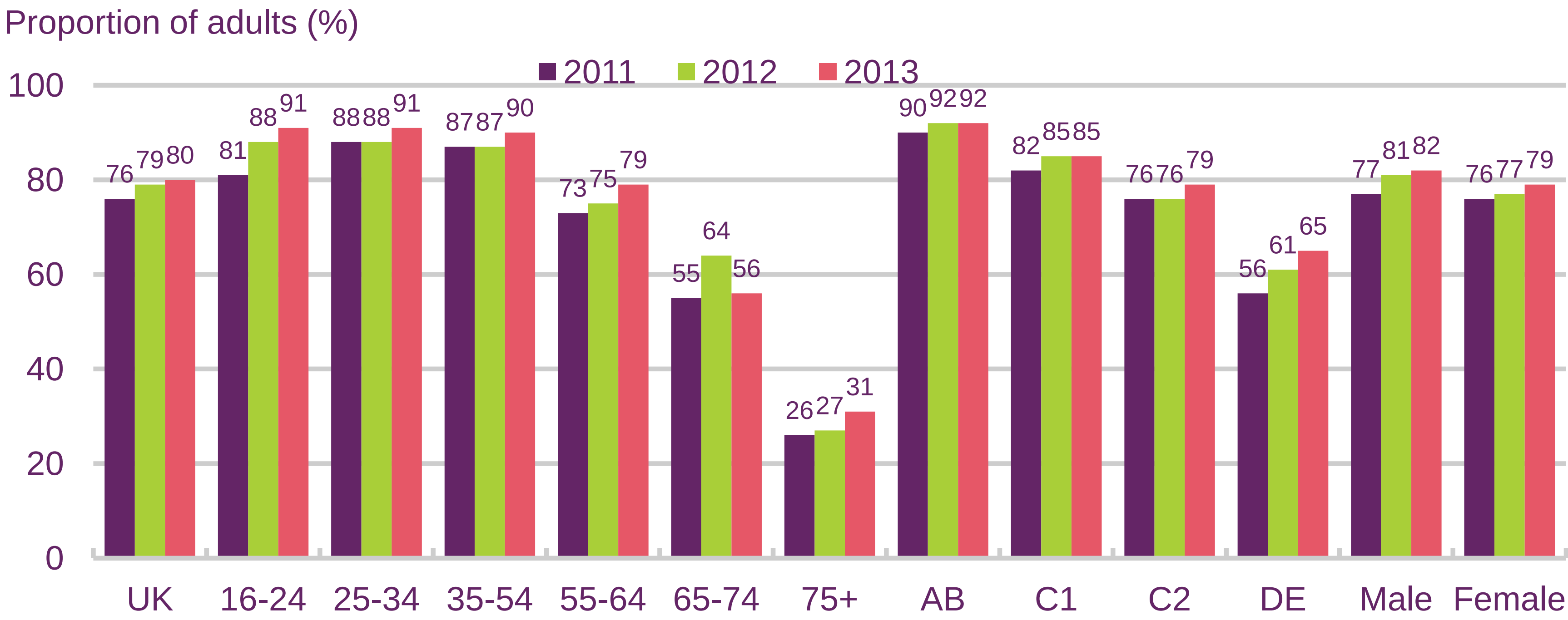
Wireless router and broadband take-up: 2007 to 2013



Source: Ofcom research, Quarter 1 2013
Base: Wireless router take-up - adults aged 16+ with a broadband connection at home (* from 2009 this is based on fixed broadband connections only). Fixed broadband penetration based on all adults aged 16+ (** prior to 2009 this is total broadband penetration).

Figure 4.18

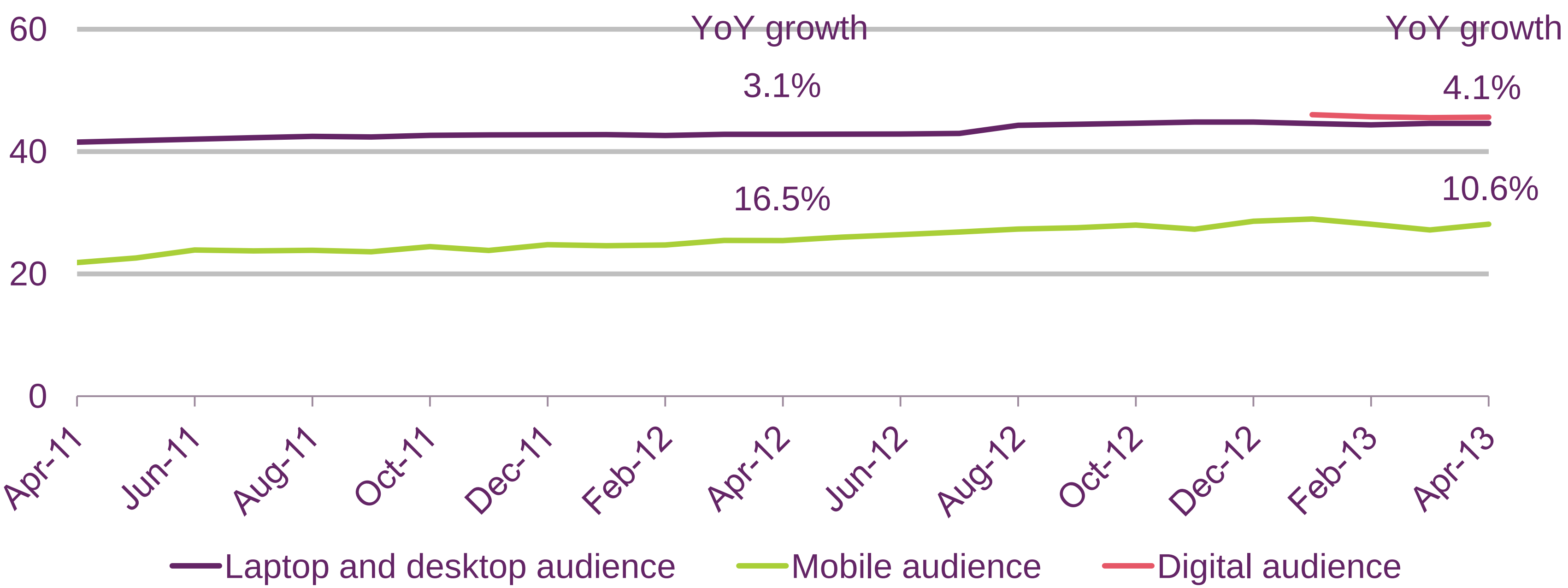
Home internet access by age, socio-economic group, and gender



QE2: Do you or does anyone in your household have access to the internet/ Worldwide Web at home?
Source: Ofcom technology tracker, Q1 2013. Base: All adults 16+ (n = 3750 UK, 456 16-24, 620 25-34, 1230 35-54, 589 55-64, 467 65-74, 388 75+, 794 AB, 1073 C1, 773 C2, 1108 DE, 1792 male, 1958 female)

Figure 4.19

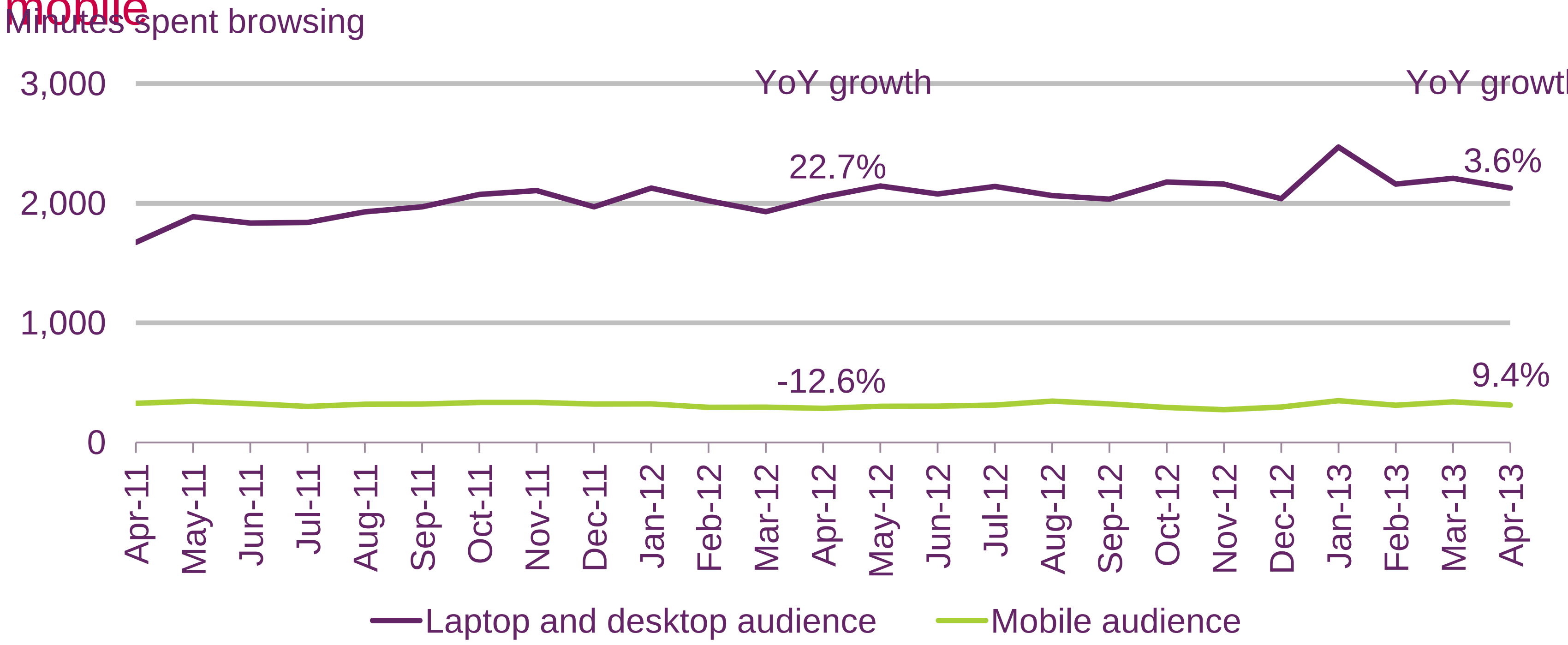
Active internet audience on laptop, desktop, and mobile devices



Source: comScore MMX,UK, home and work panel, April 2011 to April 2013; comScore MMX Multi-Platform, UK, home and work panel, January 2013 to April 2013; comScore GSMA MMM, UK, April 2011 to April 2013.

Figure 4.20

Average time browsing per internet user across laptop, desktop and mobile

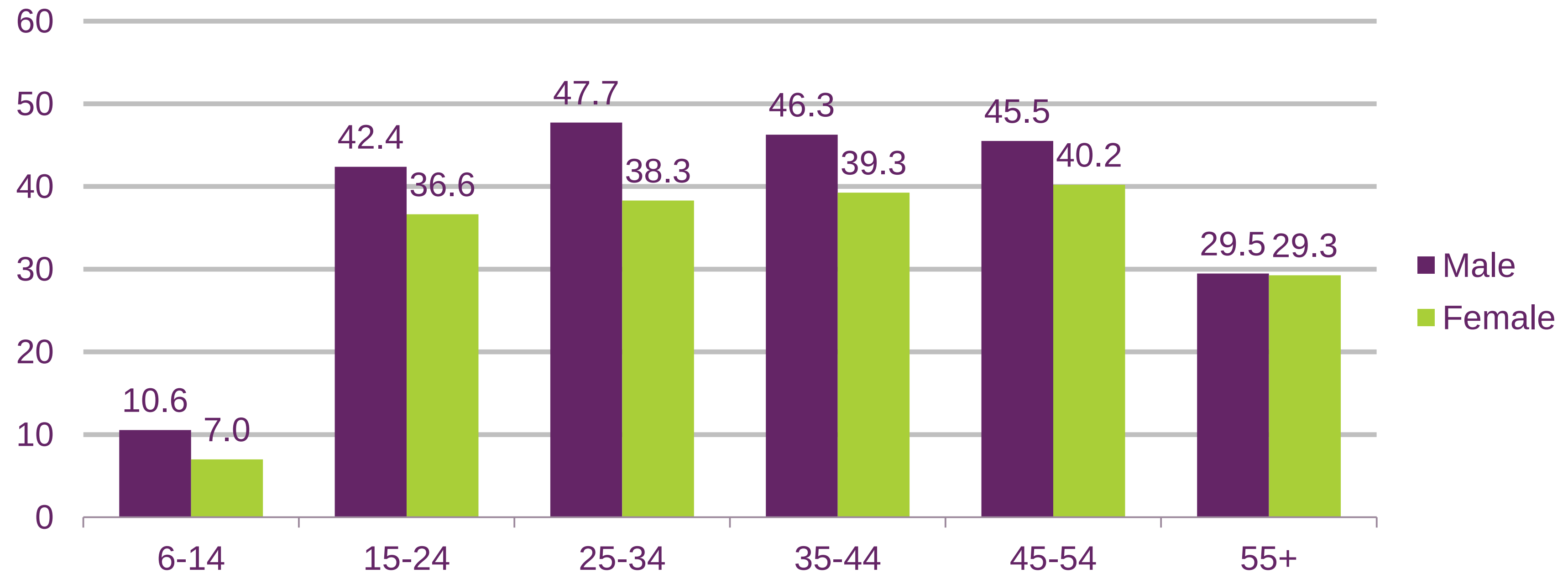


Source: comScore MMX, UK, home and work panel, April 2011 to April 2013; comScore GSMA MMM, UK, April 2011 to April 2013.
Note: Time spent online excludes time spent accessing other media such as audio or video content, and on mobile excludes time spent using mobile apps.

Figure 4.21

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

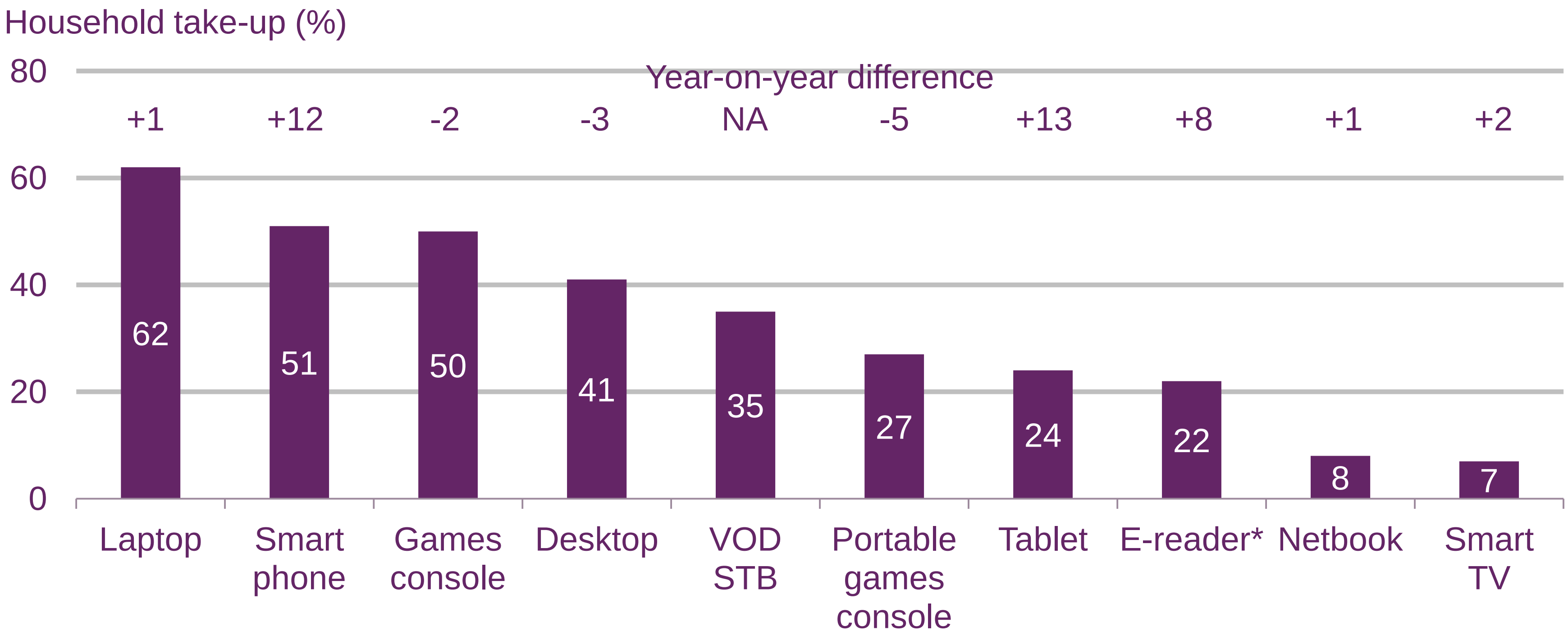
Average monthly hours online per internet user



Source: comScore MMX, home and work panel, April 2013
Note: Time spent online is a measure of time spent browsing web pages on laptop and desktop computers only. It excludes time spent accessing other media such as audio or video content.

Figure 4.22

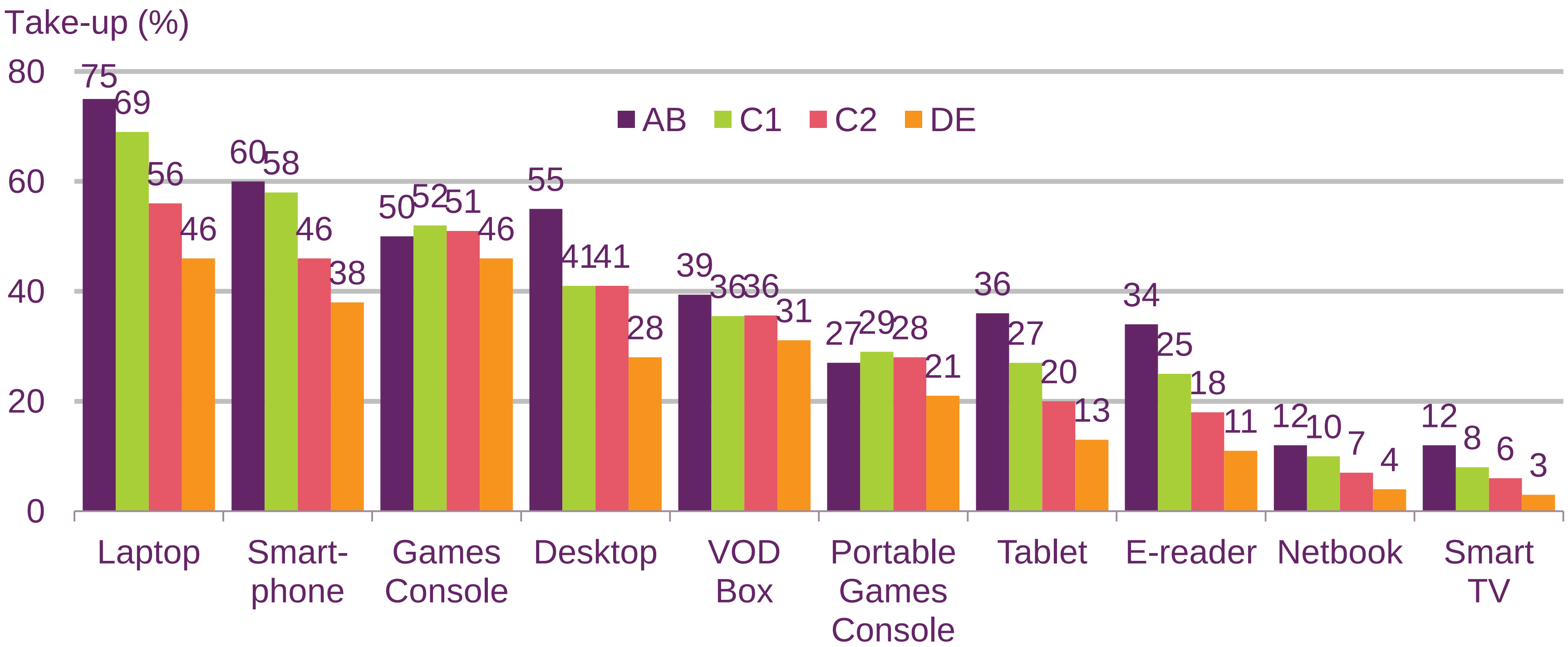
Ownership of internet-enabled devices



Source: Ofcom research, Quarter 1 2013; Base: Adults aged 16+ n = 3750
Note:IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), internet enabled STB (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV. *E-reader take-up stated here is household while elsewhere in the report we state figures by individual take-up.

Figure 4.23

Take-up among each social group of internet-enabled devices

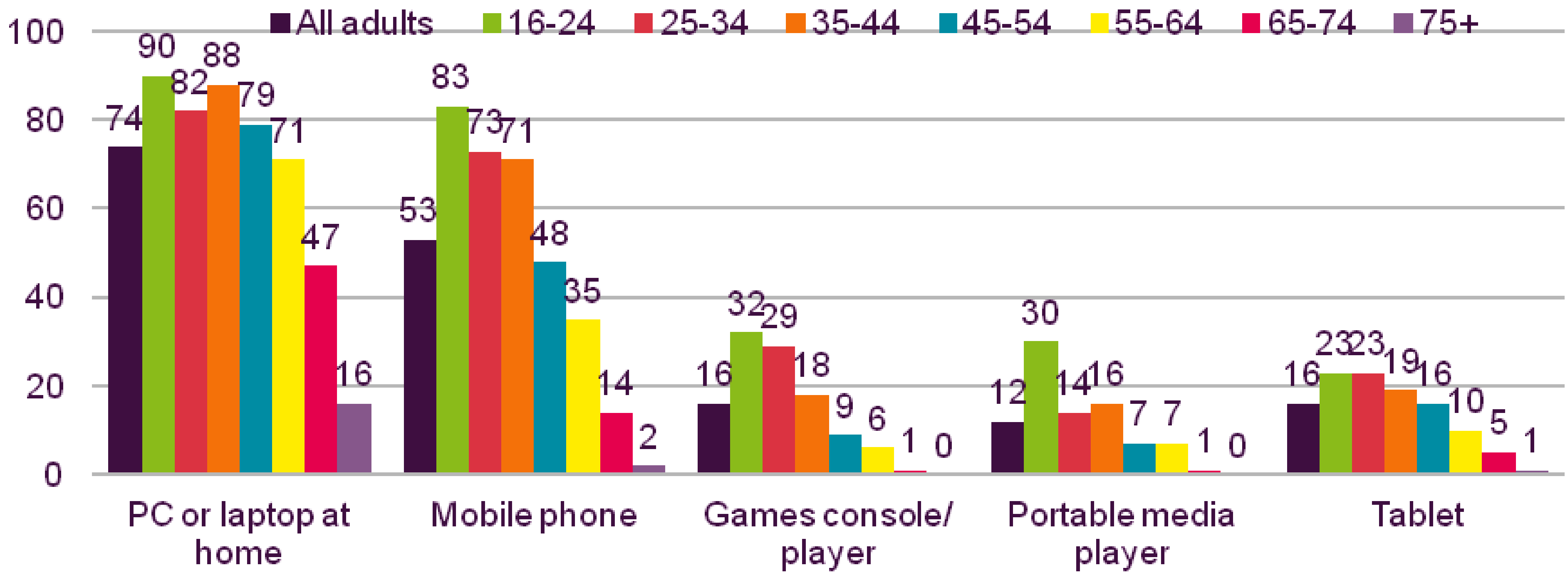


Source: Ofcom research, Quarter 1 2013
Base: Adults aged 16+, AB n = 794, C1 n = 1073, C2 n = 773, DE n = 1108

Figure 4.24

Devices used in the home to access the internet in 2012, by age

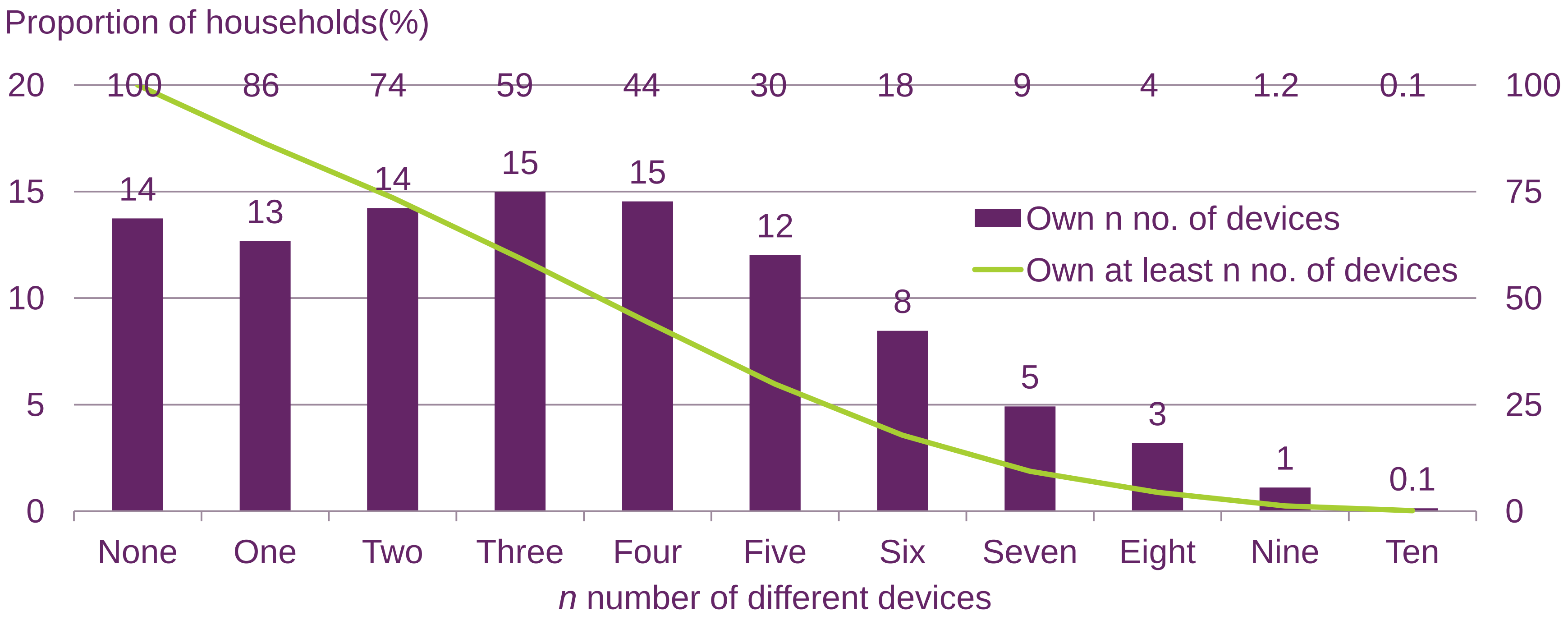
Adults 16+ (%)



IN1/ IN2- Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you personally use the internet at home?/ Do you have and use any of the items shown on this card to access the internet or to visit internet websites? (Prompted responses, single coded). Base: All adults aged 16+ (1805 aged 16+, 234 aged 16-24, 236 aged 25-34, 300 aged 35-44, 234 aged 45-54, 262 aged 55-64, 259 aged 65-74, 280 aged 75+). 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 September to November 2012

Figure 4.25

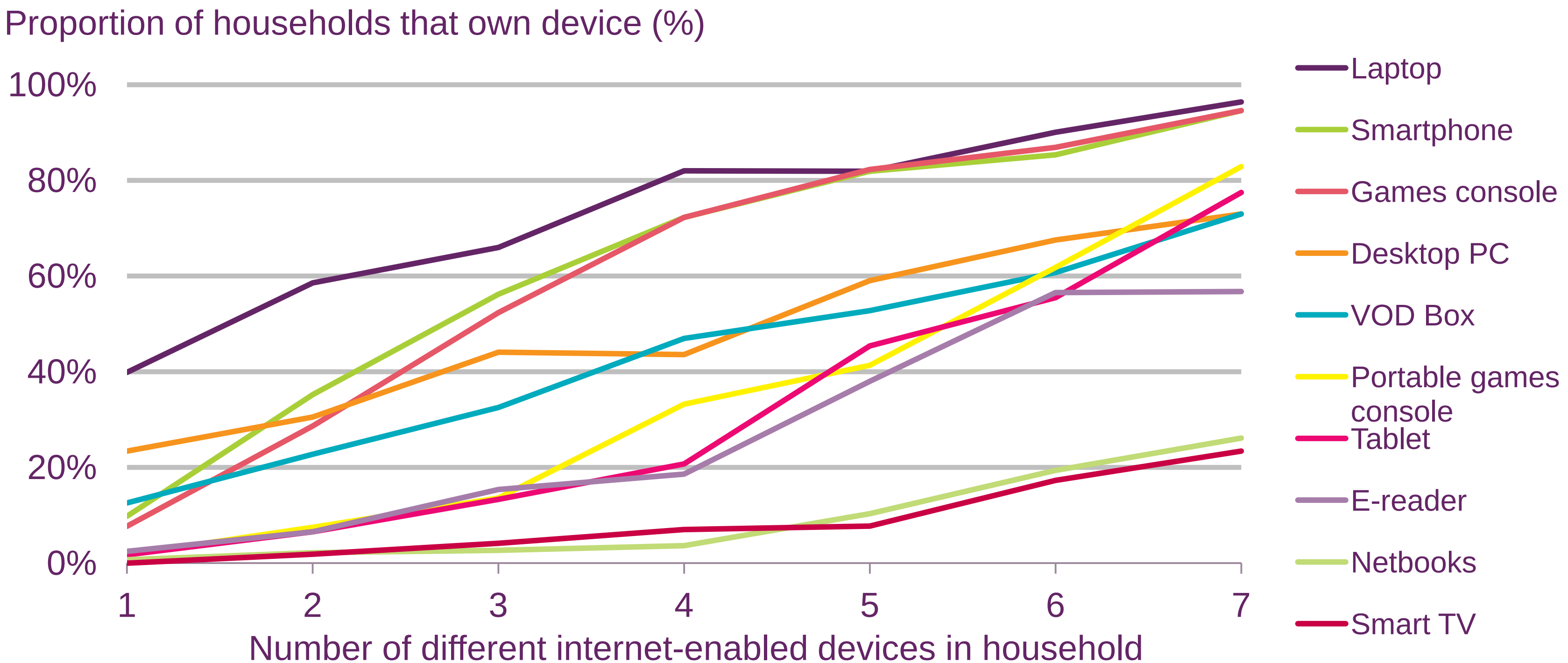
Number of different internet-enabled devices per household, Q1 2013



Source: Ofcom research, Quarter 1 2013, Base: Adults aged 16+ n = 2256
Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV.

Figure 4.26

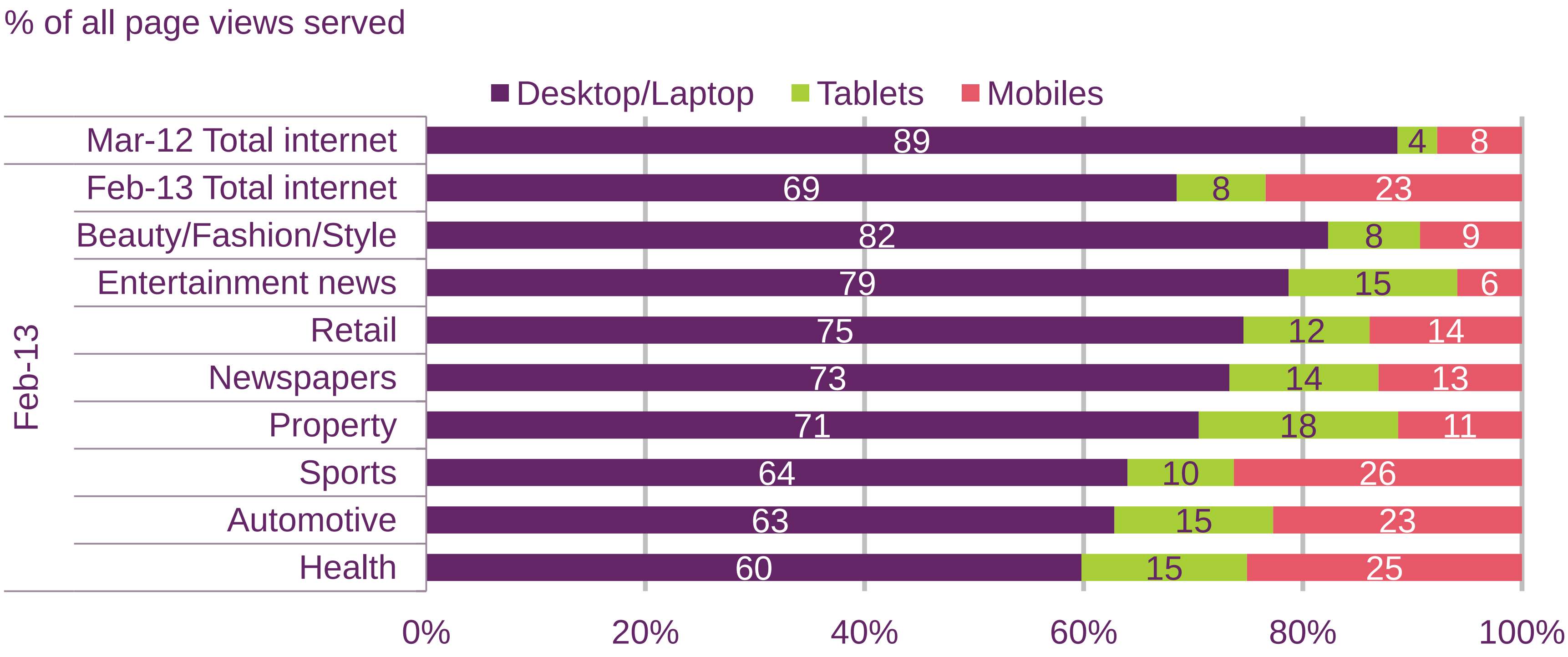
Device ownership, by number of different internet-enabled devices in the household



Source: Ofcom research, Quarter 1 2012; Base: Adults aged 16+ that own at least one IP enabled device n = 1946 (one device 286; two devices 321; three devices 338; four devices 328; five devices 271; six devices 191, seven devices 111.)Note:IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV.

Figure 4.27

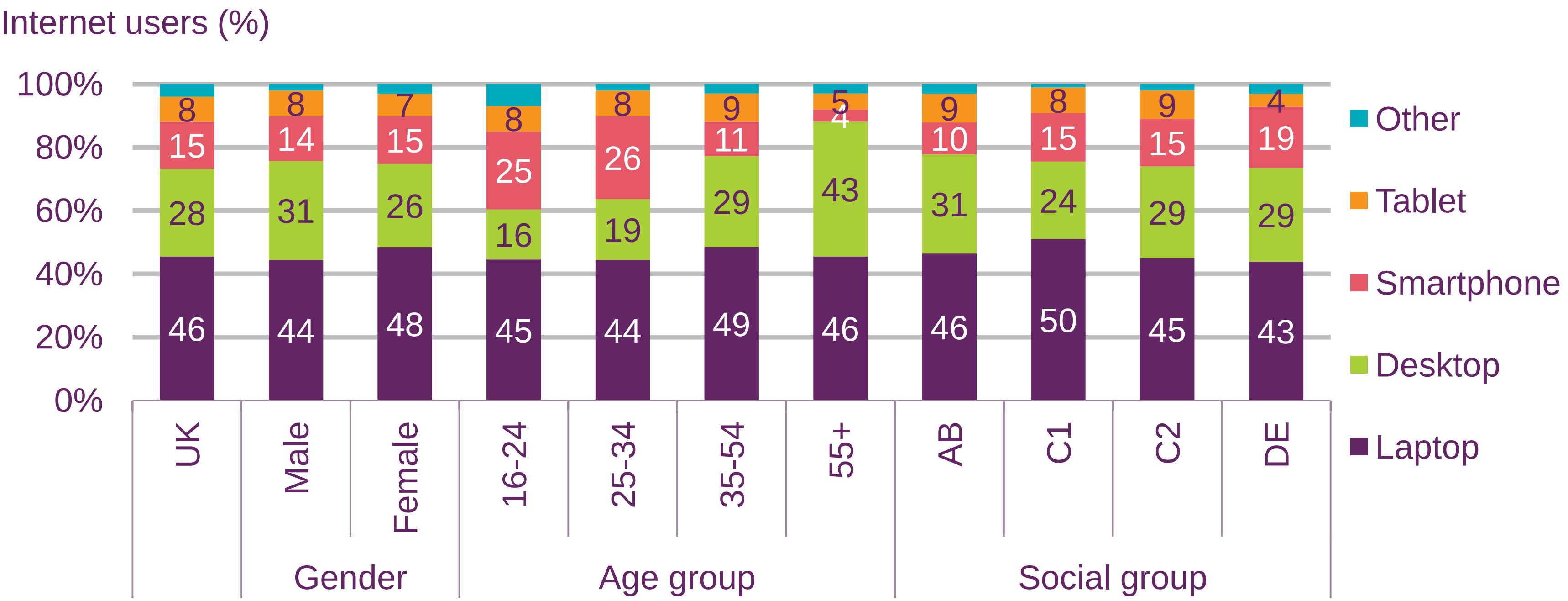
Proportion of page views on desktop/laptop, tablet, and mobile devices



Source: comScore Device Essentials, March 2012 and February 2013, UK
Note: Desktop/laptop also includes Apple Mac computers. March 2012 data rebased to remove 'Other' sources of webpage views. Tablet figures are from BETA data.

Figure 4.28

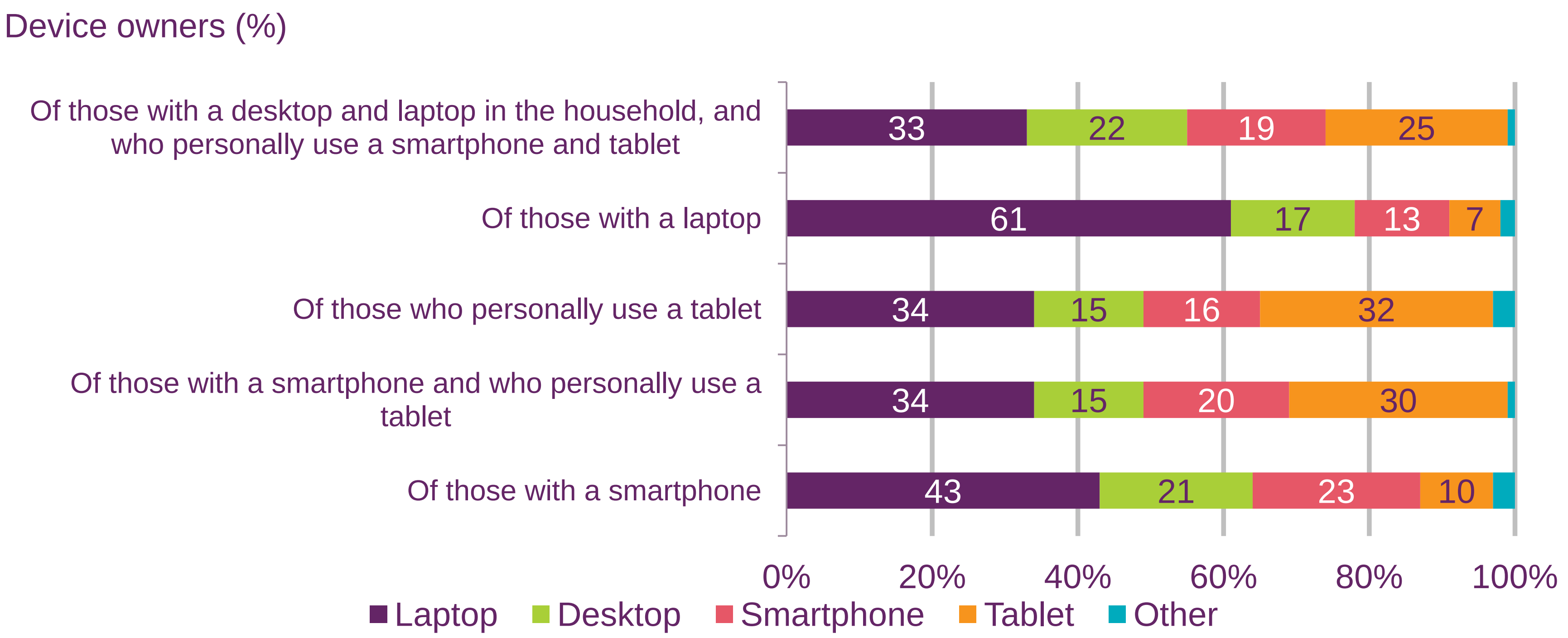
Most important device for internet access



Source: Ofcom research, Q1 2013
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

Figure 4.29

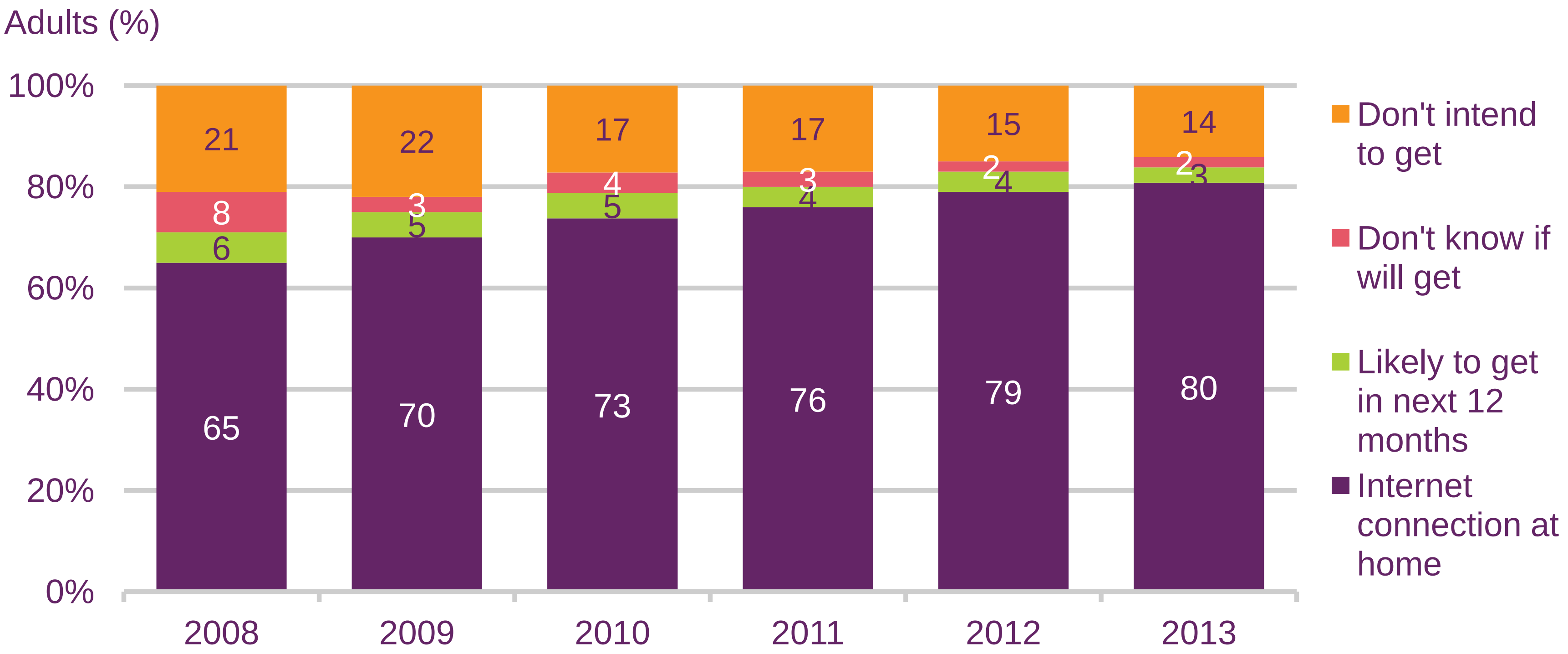
Most important device for internet access by device ownership



Source: Ofcom research, Q1 2013
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? “Other” responses include: “Netbook”, “Games console”, “Other device”, “None” and “don’t know”.

Figure 4.30

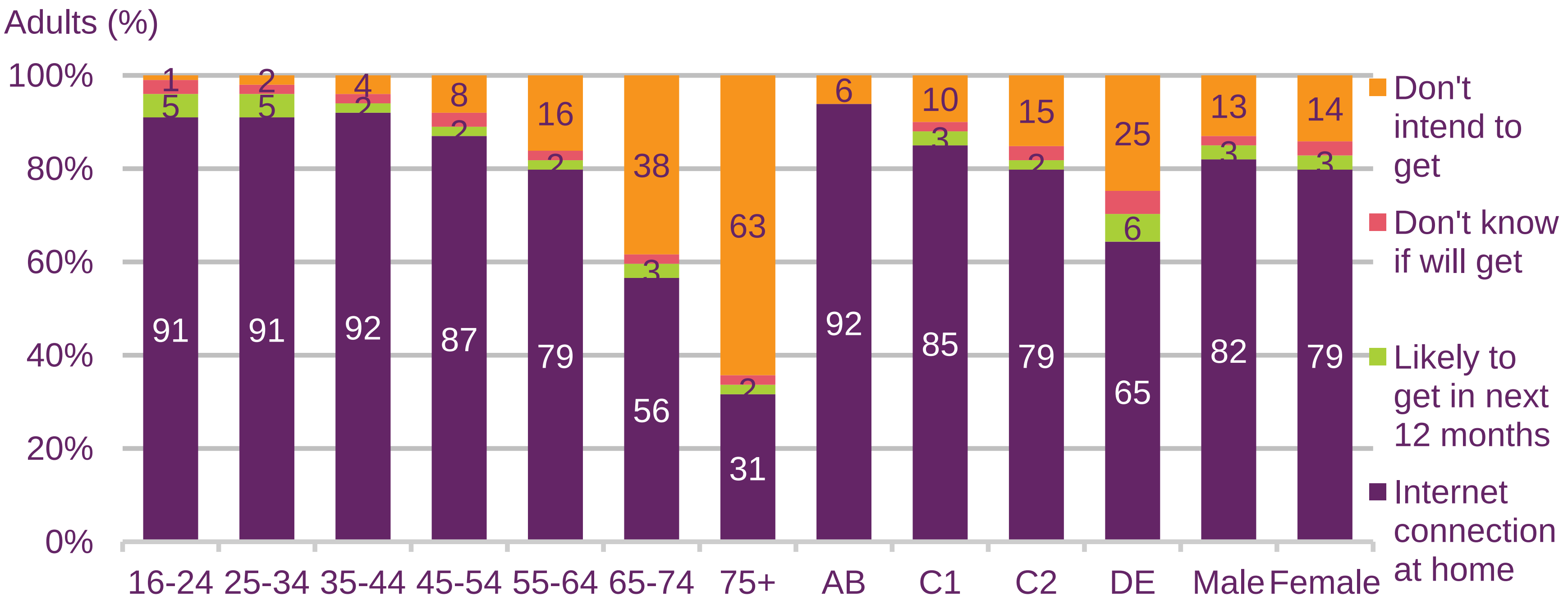
Internet take up and intentions: 2008 - 2013



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in January to February 2013
QE2/ QE24 – Do you or does anyone in your household have access to the internet / world wide web at home (via any device)?/ How likely are you to get internet access at home in the next 12 months?
Base: All adults aged 16+ (5812 aged 16+ in 2008, 6090 aged 16+ in 2009, 9013 aged 16+ in 2010, 3474 aged 16+ in 2011, 3772 aged 16+ in 2012, 3750 aged 16+ in 2013).

Figure 4.31

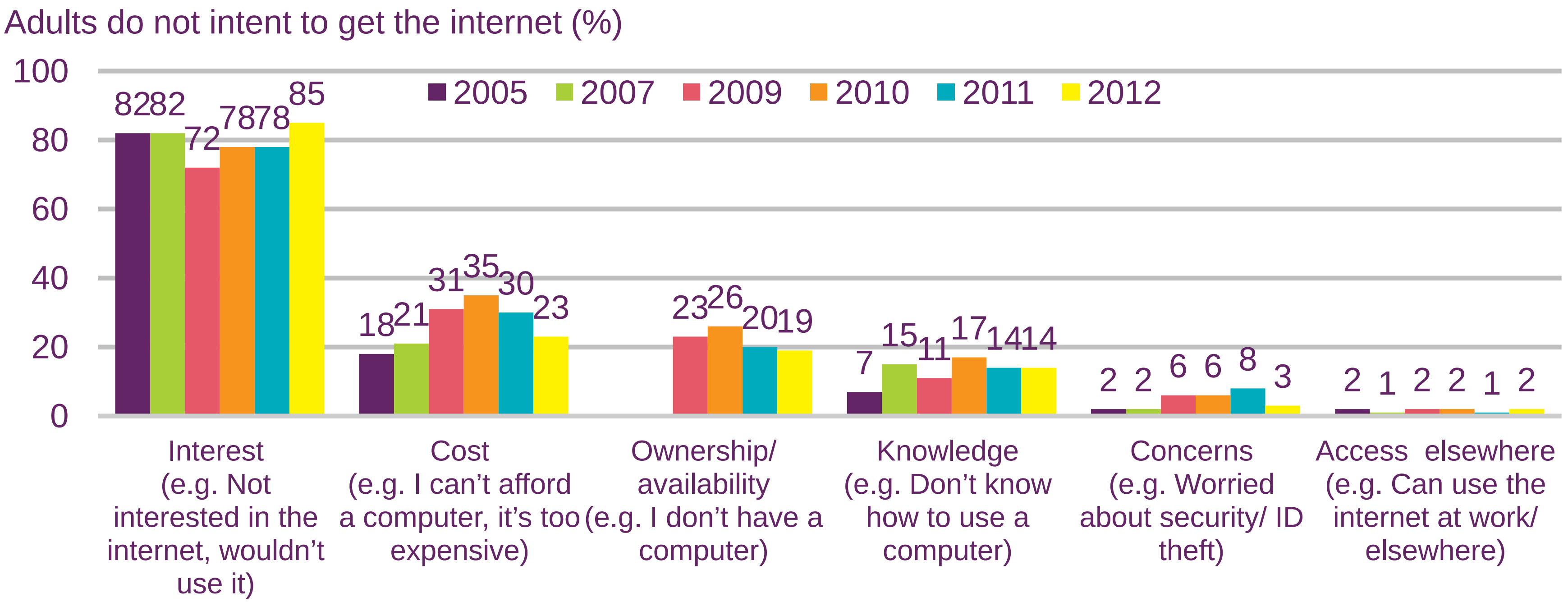
Internet take-up and intentions, by demographic group



Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in January to February 2013
QE2/ QE24 – Do you or does anyone in your household have access to the internet / world wide web at home (via any device)?/ How likely are you to get internet access at home in the next 12 months?
Base: All adults aged 16+ (5812 aged 16+ in 2008, 6090 aged 16+ in 2009, 9013 aged 16+ in 2010, 3474 aged 16+ in 2011, 3772 aged 16+ in 2012, 3750 aged 16+ in 2013).

Figure 4.32

Stated reasons for not intending to get home internet access in the next 12 months: 2005, 2007, 2009, 2010, 2011 and 2012



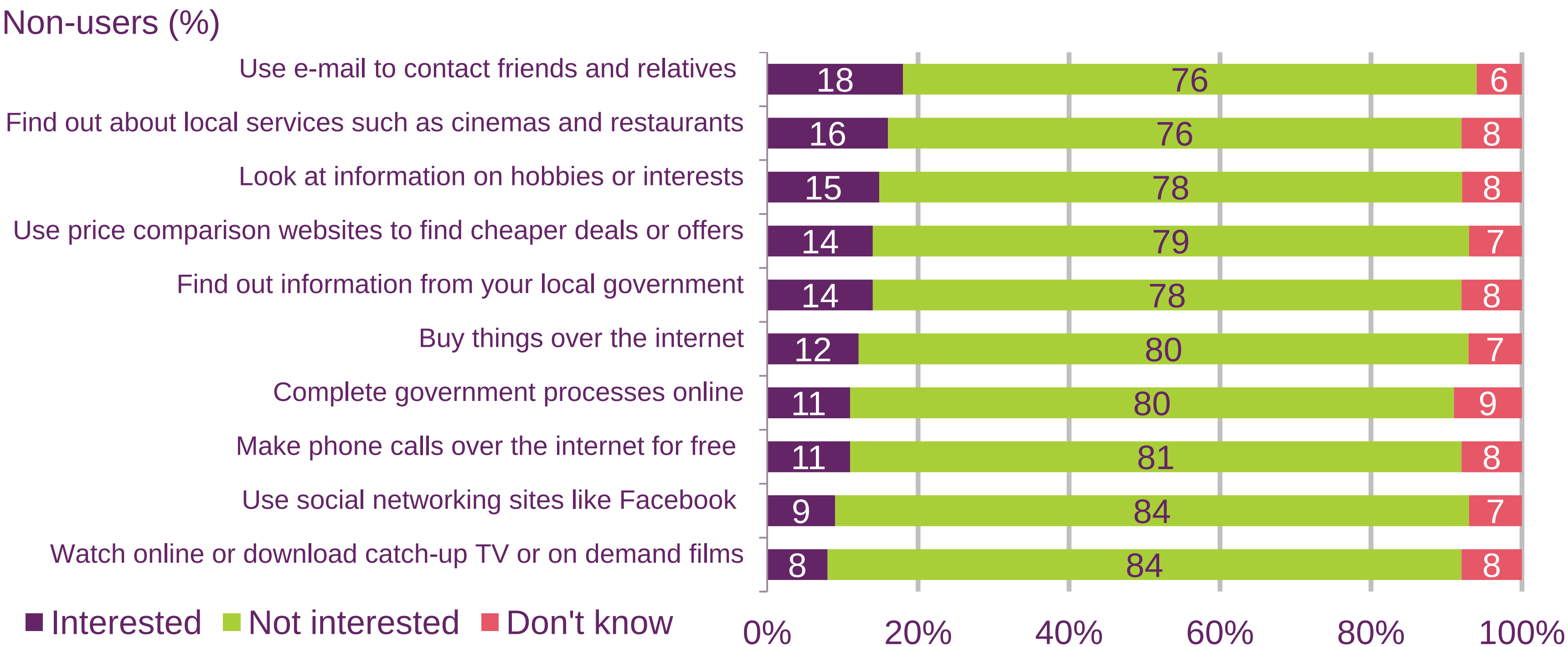
IN17/ IN18– Can you tell me what your reasons are for not getting internet access at home? (Unprompted responses, multi-coded)/ And what is your main reason for not getting internet access at home? (Unprompted responses, single coded)

Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 410 in 2009, 478 in 2010, 328 in 2011, 305 in 2012). Significance testing shows any change between 2011 and 2012. Percentages may add to more than 100% as respondents can nominate more than one reason.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012

Figure 4.33

Interest in internet activities among non-users: 2012

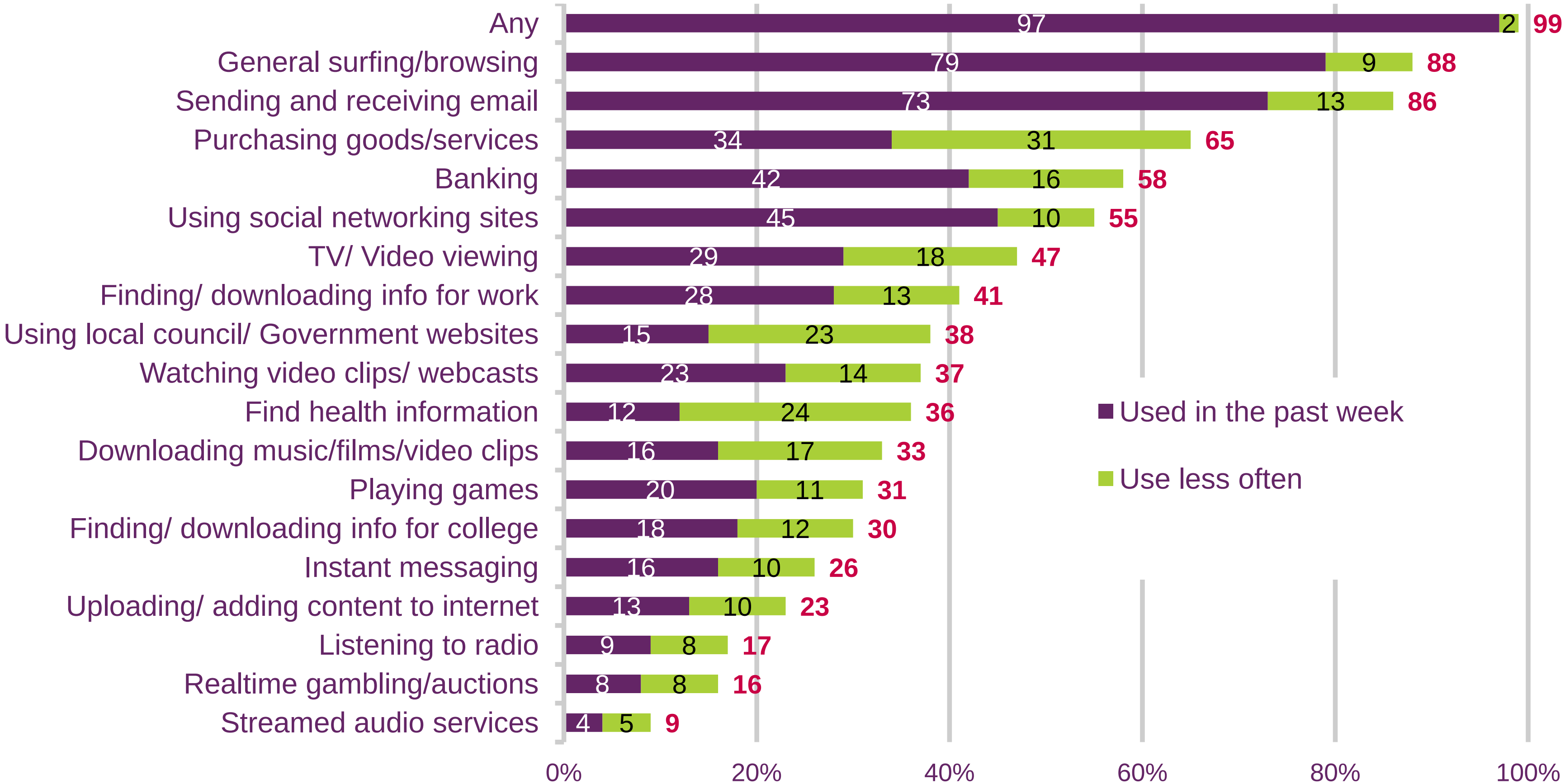


Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to November 2012
IN10A-K – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one please say which of the options on the card applies to you. (Prompted responses, single coded)
Base: Adults aged 16+ who do not use the internet at home or elsewhere (542 in 2009, 628 in 2010, 454 in 2011, 424 in 2012) – significance testing shows any change between 2011 and 2012

4.3 WEB-BASED CONTENT

Figure 4.34

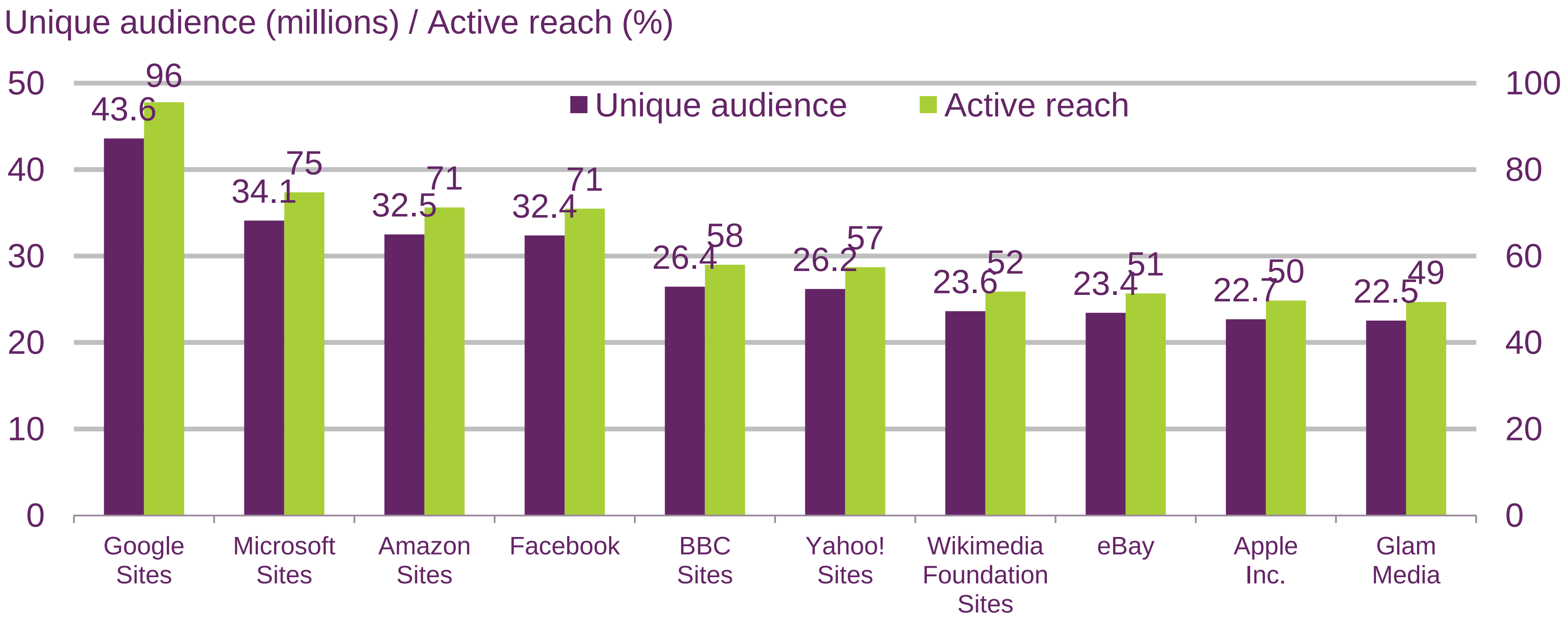
Claimed use of the internet for selected activities



QE5. Which, if any, of these do you use the internet for? NB Question wording for QE5 prior to 2013 asked about household use of the internet at home. In 2013 QE5 asked about individual use of the internet anywhere.
Source: Ofcom research, Quarter 1 2013
Base: Adults aged 16+ with a broadband connection at home (n= 2666 UK)

Figure 4.35

Top 10 most popular internet properties among the digital audience

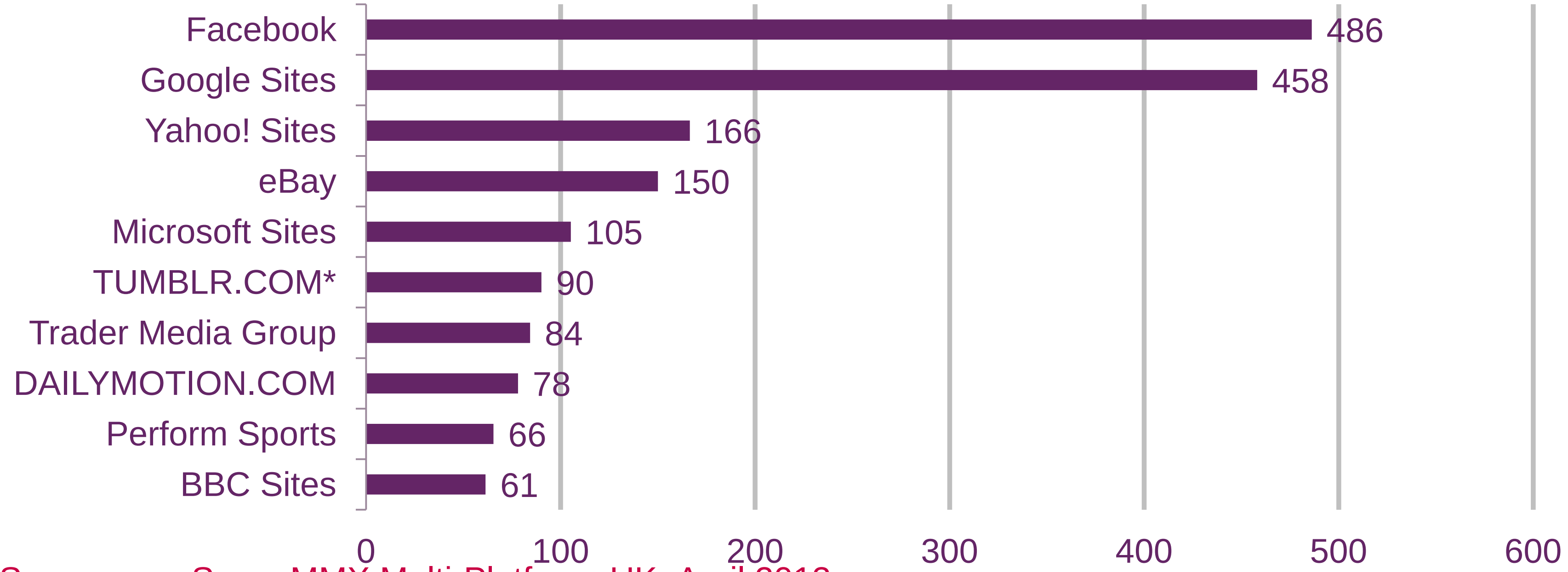


Source: comScore MMX Multi-Platform, UK, April 2013
All sites listed are at the property level. Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network mobile browsing usage.

Figure 4.36

Top 10 internet properties among the digital audience, by time spent

Minutes per visitor per month

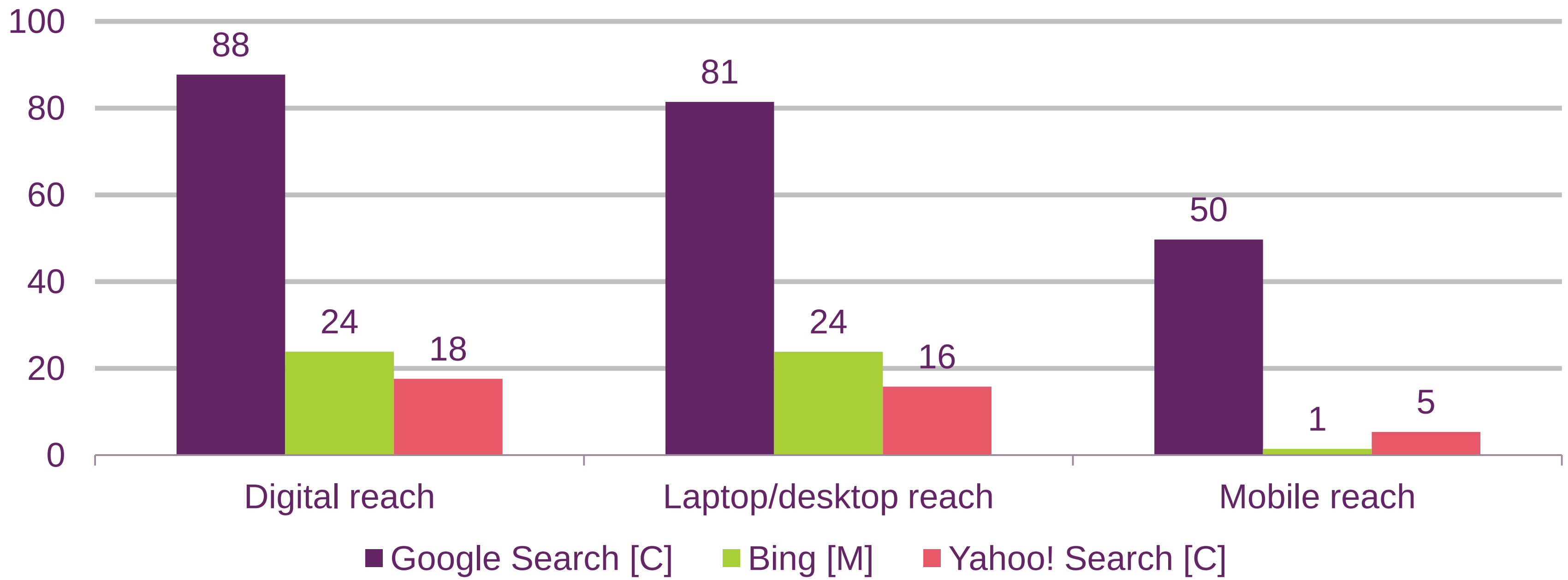


Source: comScore MMX Multi-Platform, UK, April 2013
Note: All sites listed are at the property level. Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network mobile webpage browsing. It excludes time spent accessing audio content and on mobile apps. * Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Figure 4.37

Active reach of search websites across digital, laptop/desktop and mobile audiences: April 2013

Share of audience (%)

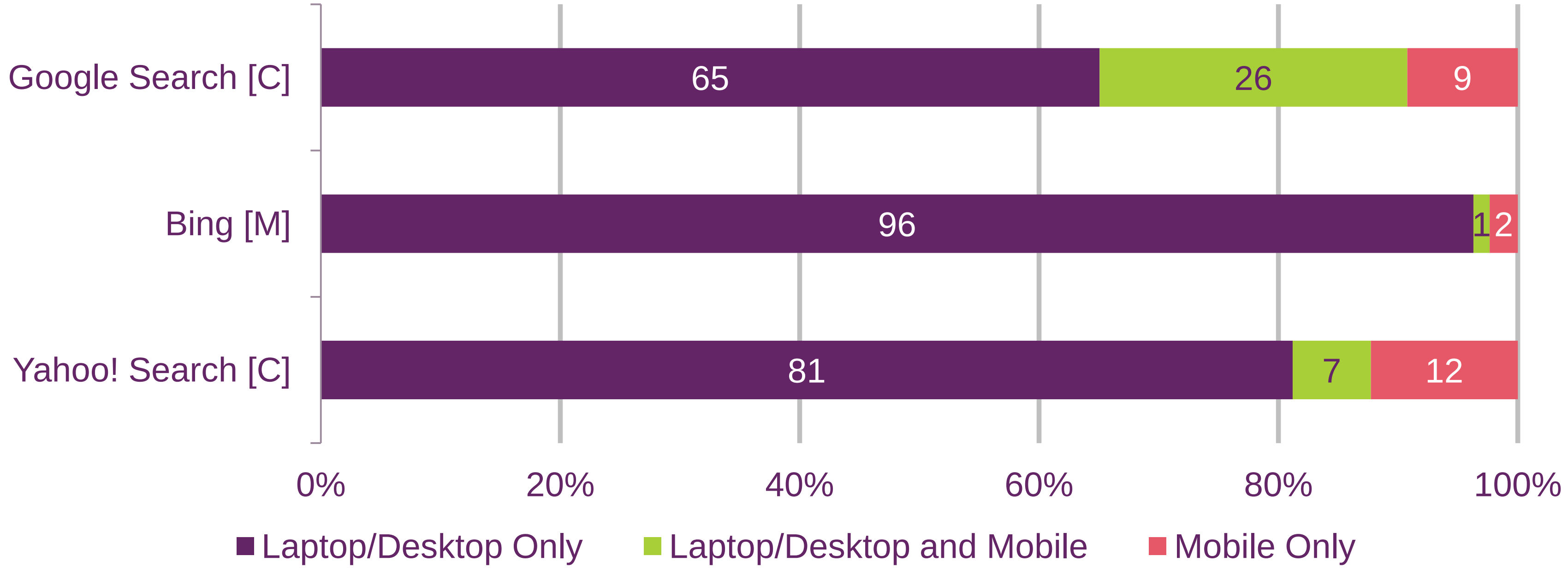


Source: comScore MMX Multi-Platform, UK, April 2013
Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, and on-network mobile browsing.

Figure 4.38

Overlap of audiences between platforms: April 2013

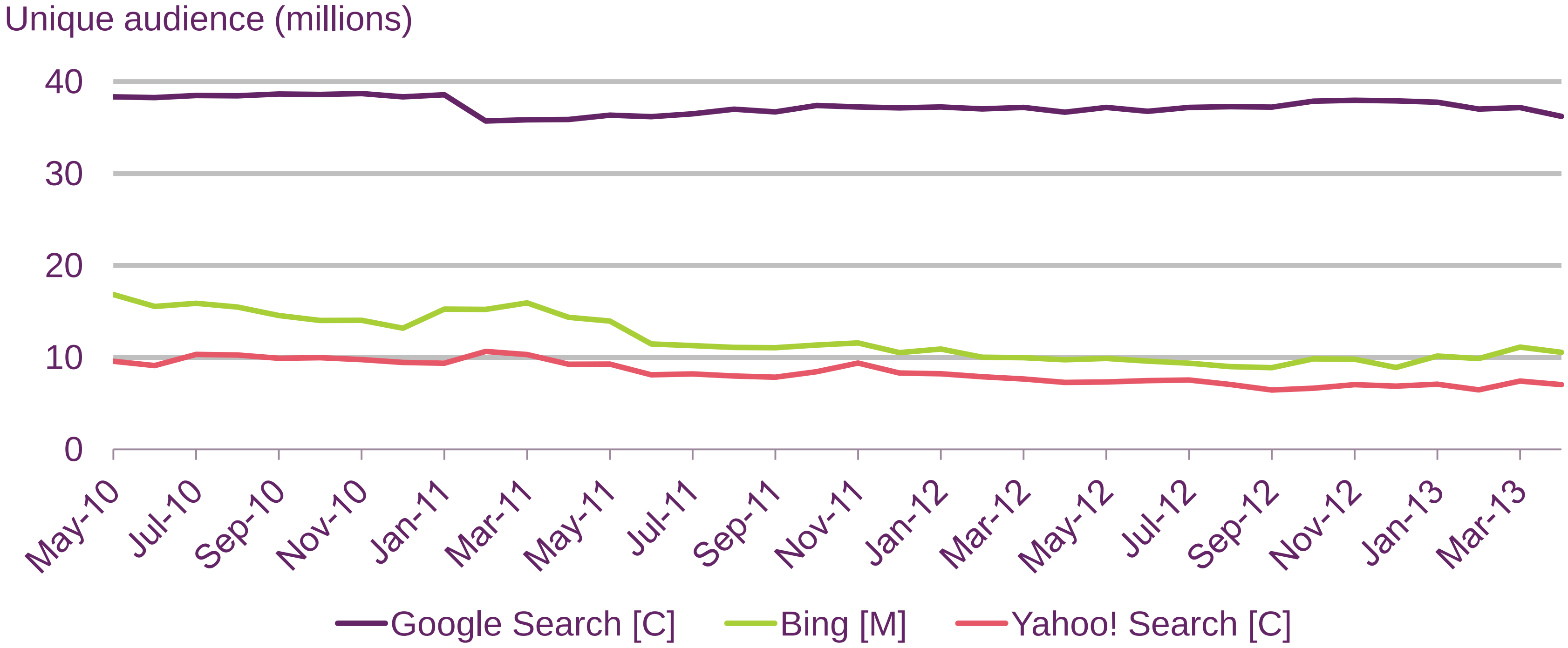
Share of audience (%)



Source: comScore MMX Multi-Platform, UK, April 2013
Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, and on-network mobile browsing.

Figure 4.39

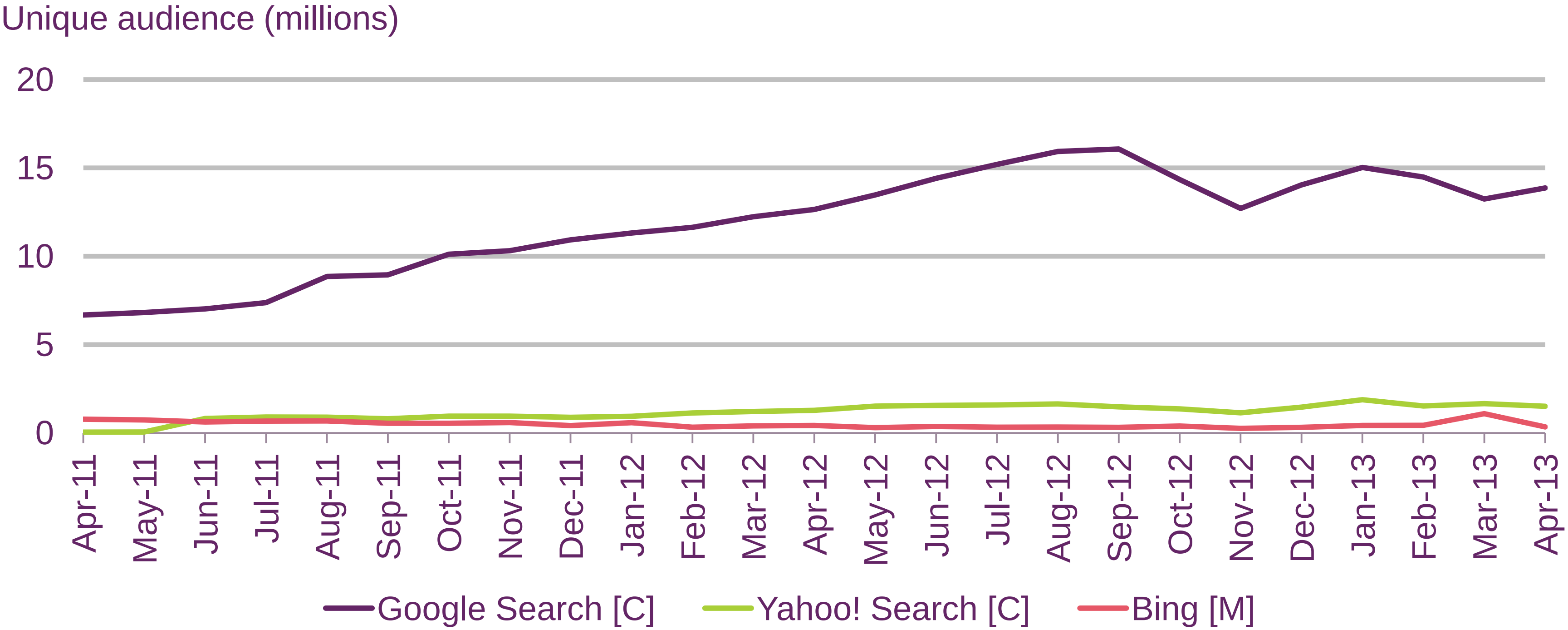
Laptop and desktop unique audience of selected search websites: May-10 to Apr-13



Source: comScore MMX, UK, home and work panel, May 2010 to April 2013
Note: Change in methodology in February 2011

Figure 4.40

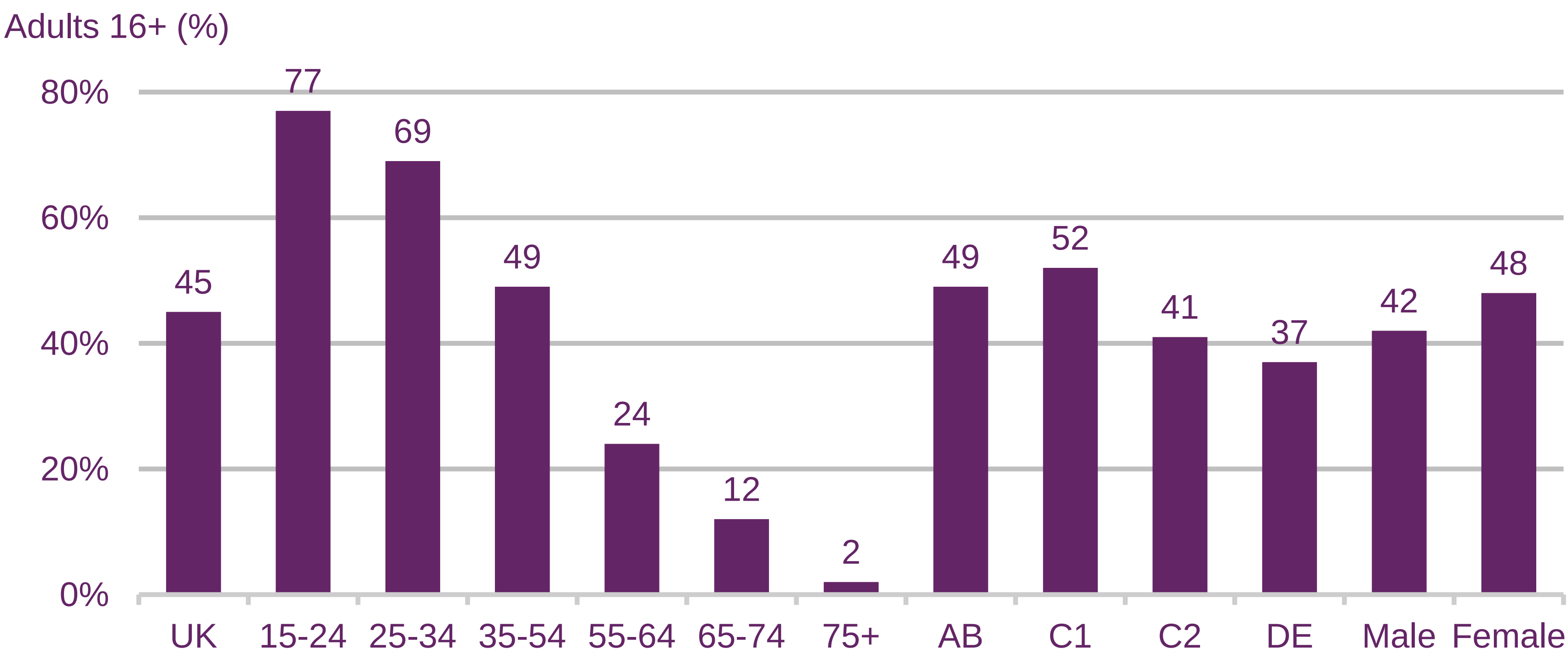
Mobile unique audience of selected search websites: Apr-11 to Apr-13



Source: comScore GSMA MMM, UK, browser access only, on network, April 2011 to April 2013

Figure 4.41

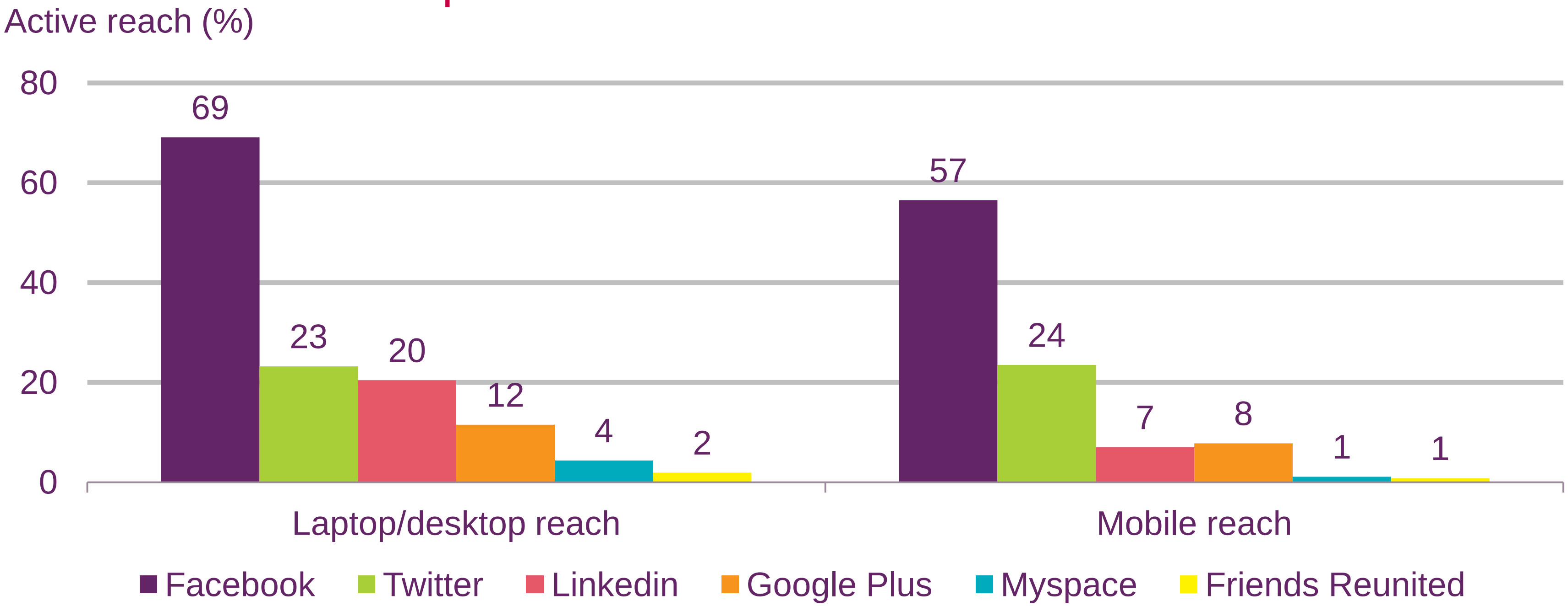
Proportion of adults who access social networking sites at home



Source: Ofcom Consumer Research Q1 2013
Base: All adults aged 16+ (n = 5812 Q1 2008, 1581 Q3 2008, 6090 Q1 2009, 9013 Q1 2010, 3474 Q1 2011, 3772 Q1 2012, 3750 Q1 2013) QE5. Which, if any, of these do you use the internet for? NB Question wording for QE5 prior to 2013 asked about household use of the internet at home. In 2013 QE5 asked about individual use of the internet anywhere.

Figure 4.42

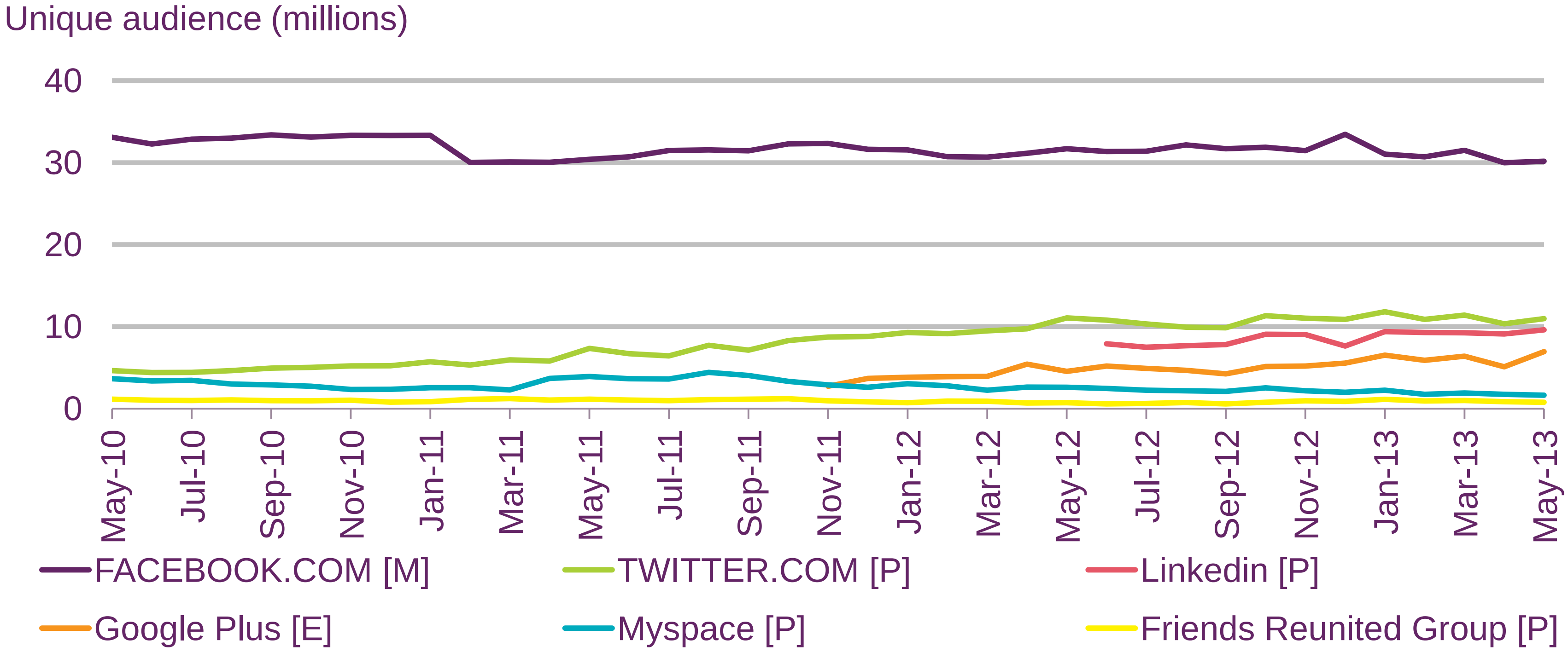
Active reach of social networking websites across laptop/desktop and mobile audiences: April 2013



Source: comScore MMX Multi-Platform, UK April 2013; comScore MobiLens, UK, April 2013, mobile internet users 13+
Note: Entities cited from comScore MMX MP: FACEBOOK.COM [M], TWITTER.COM [P], Linkedin [P], Google Plus [E], Myspace [P], Friends Reunited Group [P] and includes laptop/desktop browsing and laptop/desktop video streams.

Figure 4.43

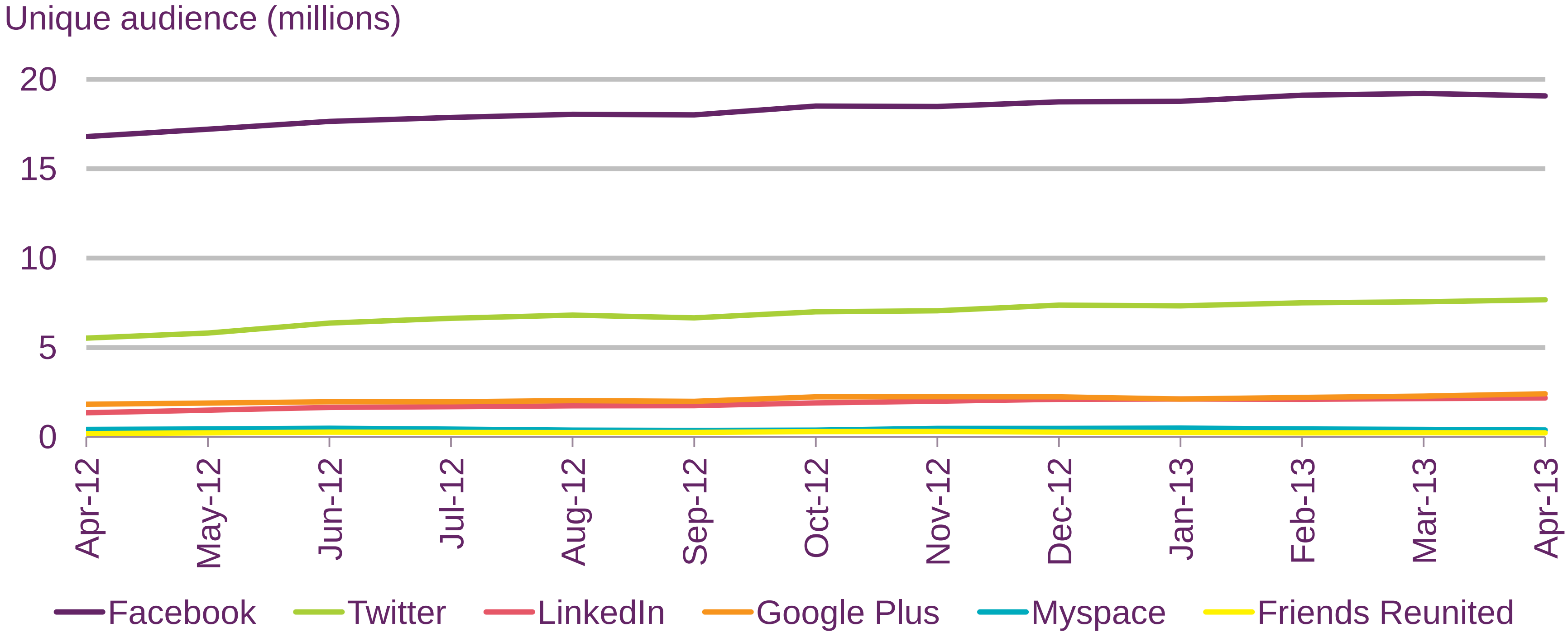
Unique audience of selected social networking websites on laptop/desktop computers: May-10 to May-13



Source: comScore MMX, UK, home and work panel, May 2010 to April 2013
Note: Change of methodology in February 2011

Figure 4.44

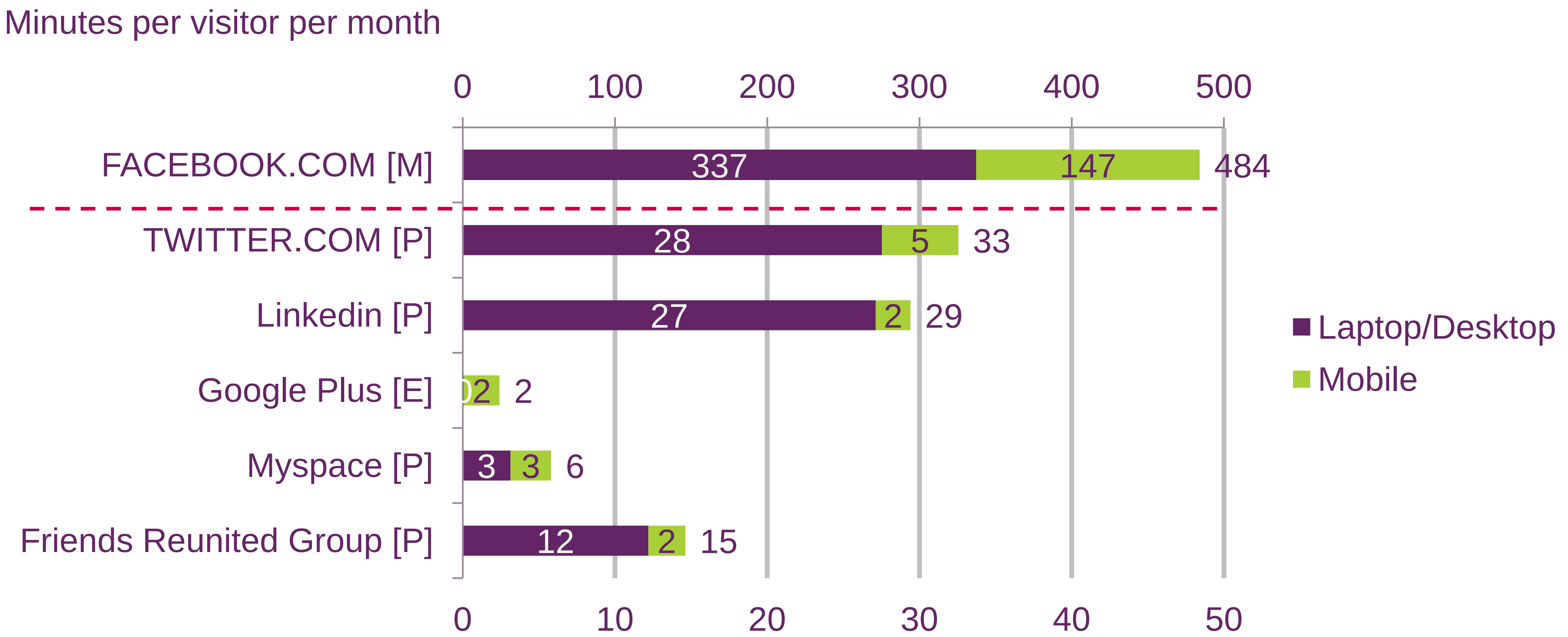
Unique audience of selected social networking websites on mobile phones: Apr-12 to Apr-13



Source: comScore MobiLens, UK, April 2012 to April 2013
Base: Mobile internet users 13+

Figure 4.45

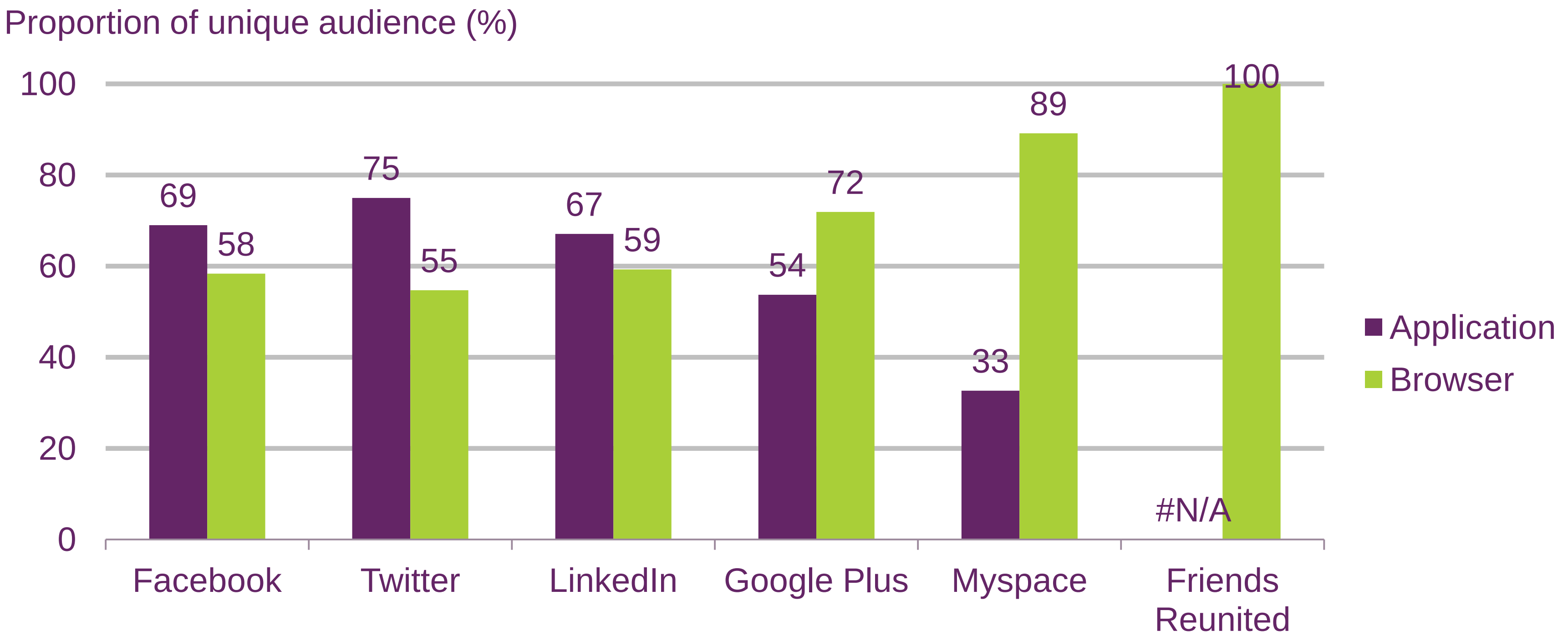
Time spent on social networking sites across laptop, desktop and mobile



Source: comScore MMX Multi-Platform, UK, April 2013,
Note: Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network mobile webpage browsing. It excludes time spent accessing audio content, and excludes mobile applications on mobile phones.

Figure 4.46

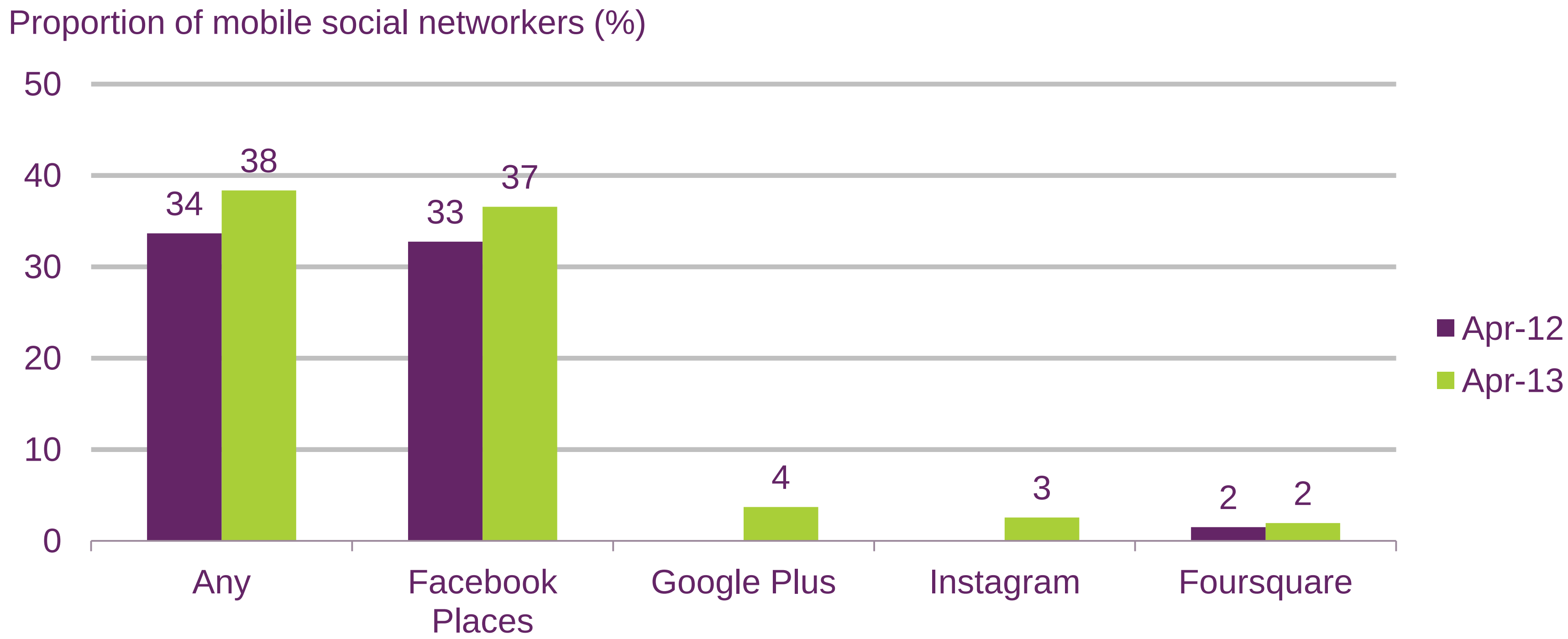
Application and browser access of social networks on a mobile phone



Source: comScore MobilLens, UK, 3 month average ending April 2013

Figure 4.47

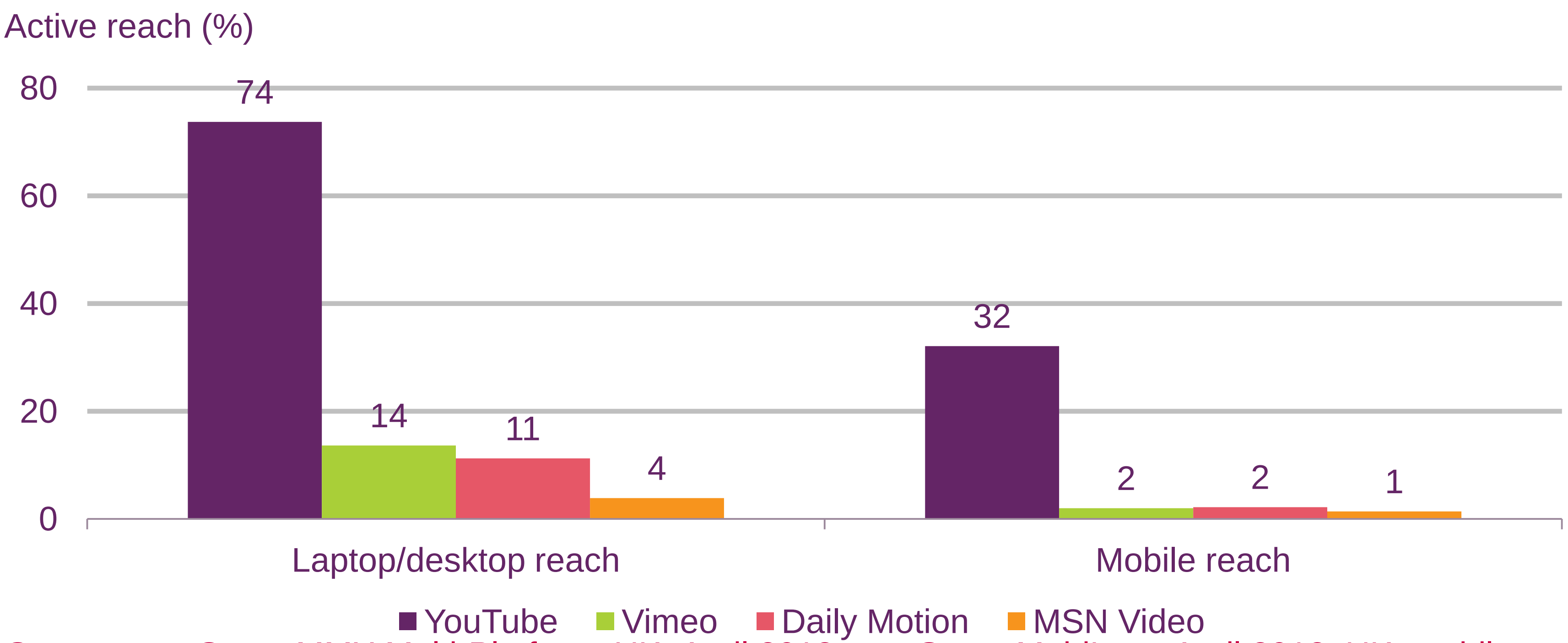
Use of check-in services by mobile social networkers



Source: comScore MobiLens, UK, 3 month average ending April 2012 and April 2013
Base: UK mobile phone users 13+ who used a social network ever in a month

Figure 4.48

Reach of online video services on laptop, desktop and mobile: April 2013



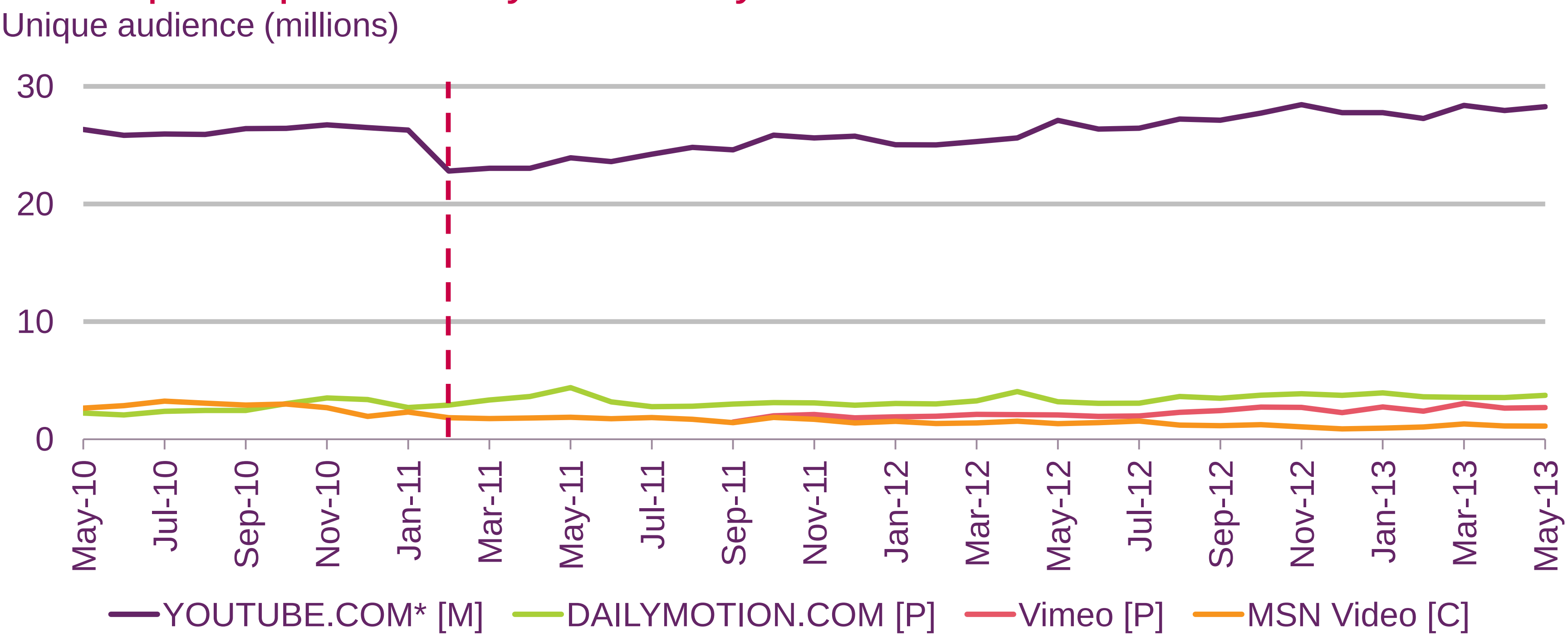
Source: comScore MMX Multi-Platform, UK, April 2013; comScore MobiLens April 2013, UK, mobile internet users 13+

Note: Entities from comScore MMX MP were YOUTUBE.COM* [M], Vimeo [P], DAILYMOTION.COM [P], MSN Video [C] and include laptop/desktop browsing and laptop/desktop video streams.

* Indicates that the entity has assigned traffic to certain pages in the domain to other entities.

Figure 4.49

Unique audience of selected online video websites on laptop and desktop computers: May-10 to May-13

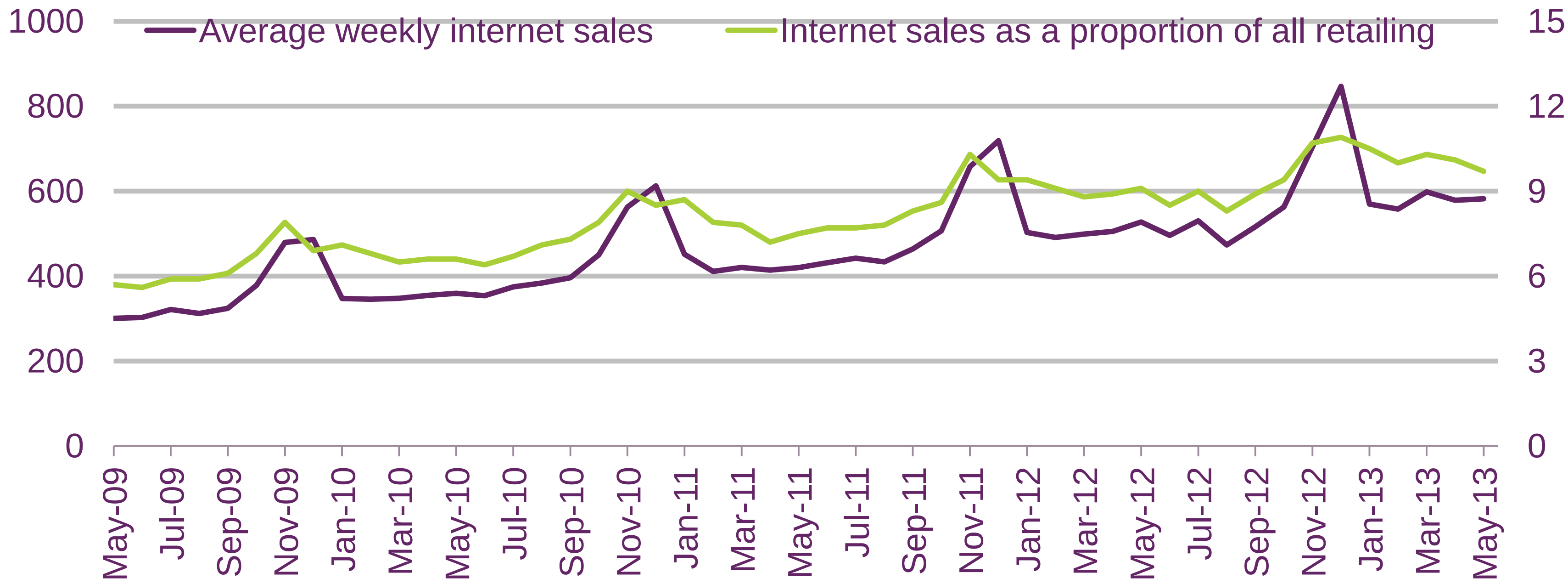


Source: comScore MMX, UK, home and work panel, May 2010 to May 2013
Note: Data before February 2011incomparable because of a change in methodology.
* Indicates that the entity has assigned traffic to certain pages in the domain to other entities.

Figure 4.50

GB internet retail sales

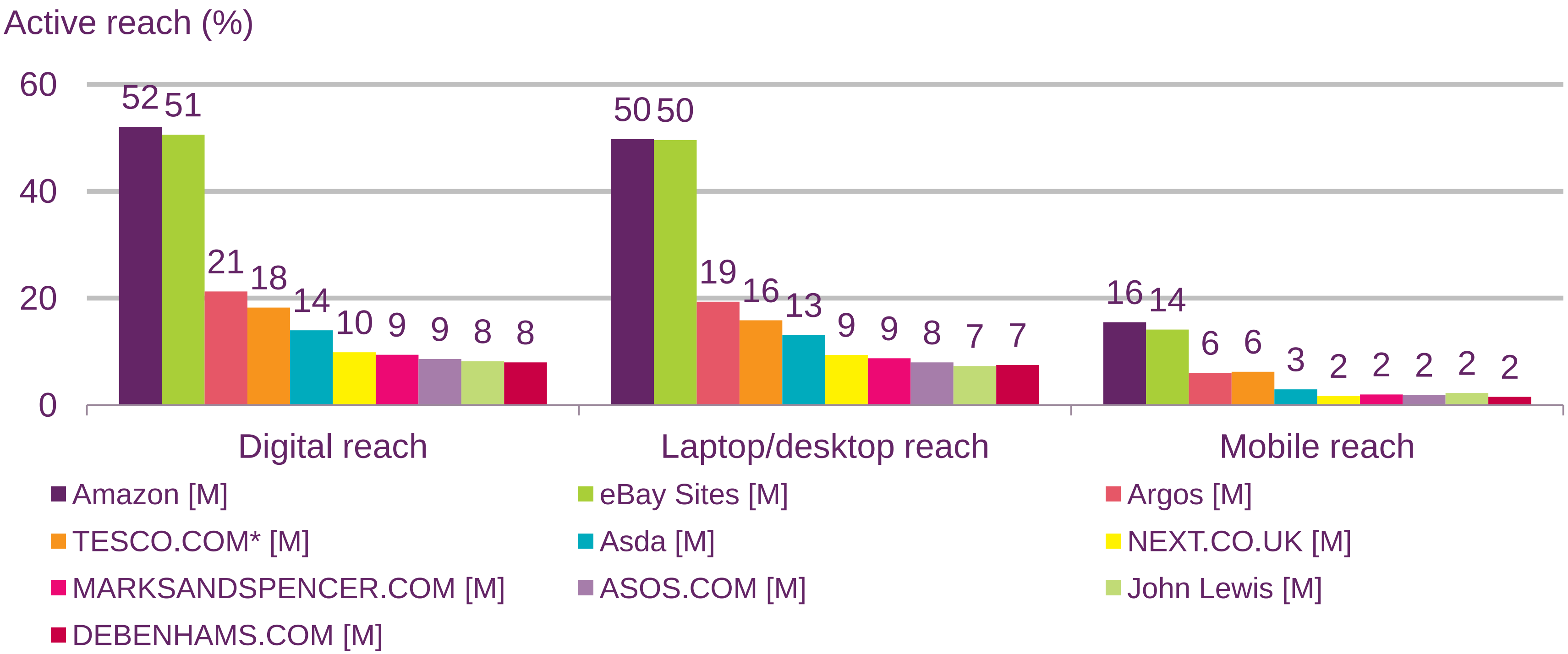
Sales (£m) / All retailing excluding automotive fuel (%)



Source: Office for National Statistics, Retail Sales Statistical Bulletin, May 2009 to May 2013
http://www.ons.gov.uk/ons/rel/rsi/retail-sales/may-2013/rft-rsi-tables-may-2013.xls
Note: This data is for Great Britain only and excludes Northern Ireland, the Isle of Man, or the Channel Islands.

Figure 4.51

Active reach of online retail websites across platforms: April 2013

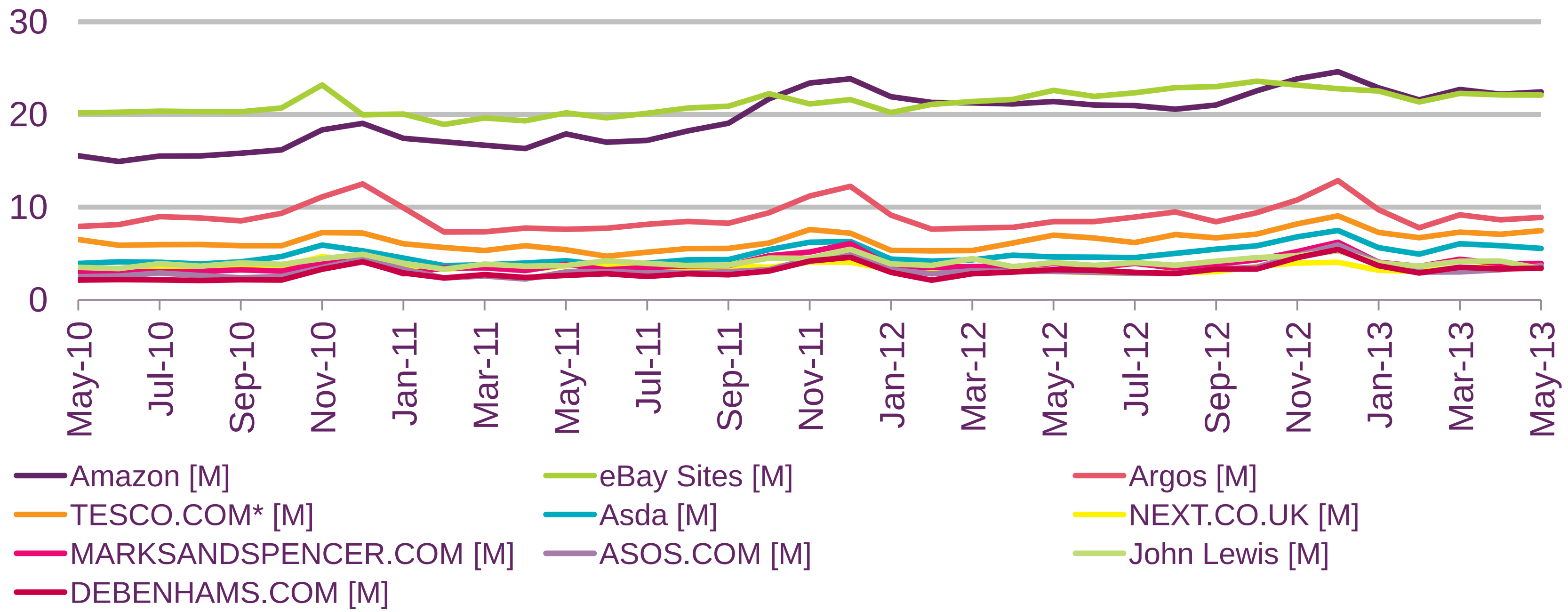


Source: comScore MMX Multi-Platform, UK, April 2013.
Note: Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network mobile browsing usage.

Figure 4.52

Unique audience of selected online retailers on laptop and desktop computers: May 2010 to May 2013

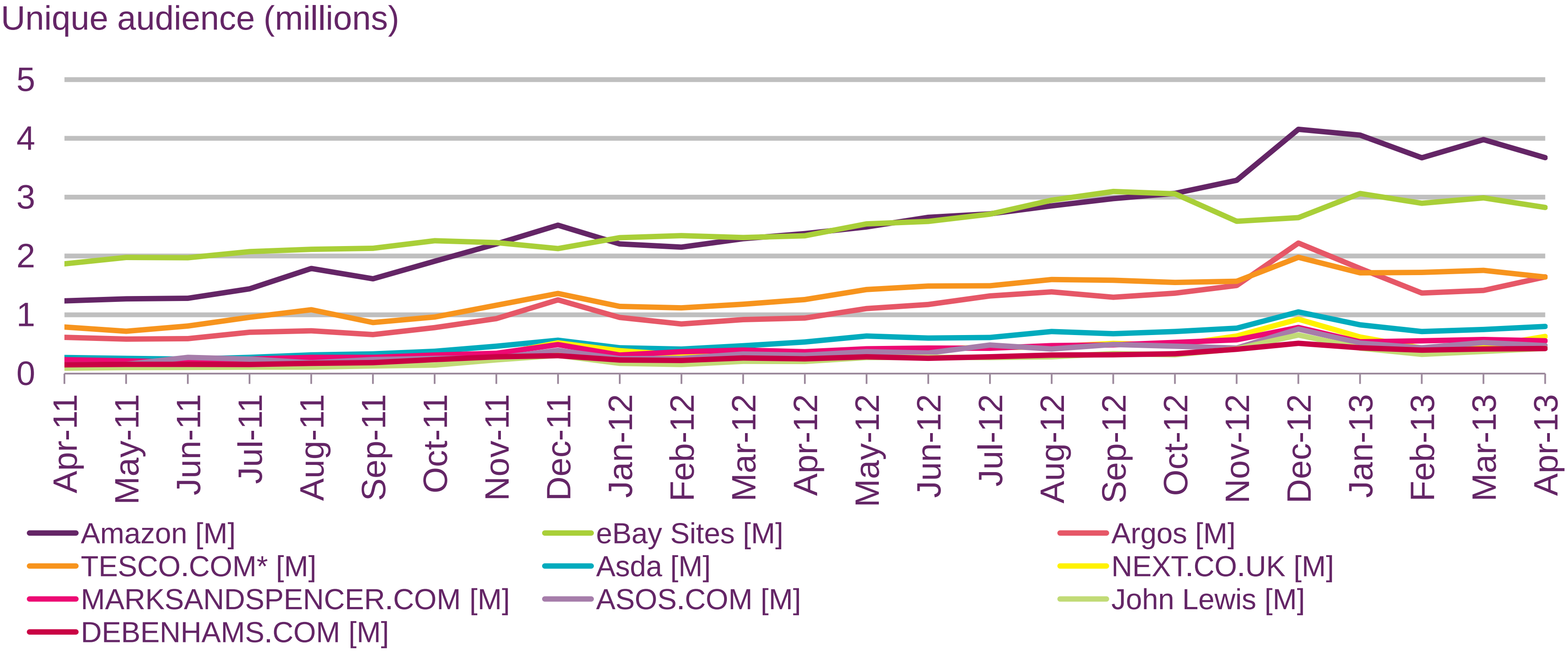
Unique audience (millions)



Source: comScore MMX, UK, home and work panel, May 2010 to April 2013

Figure 4.53

Mobile unique audience of selected online retailers: Apr-11 to Apr-13

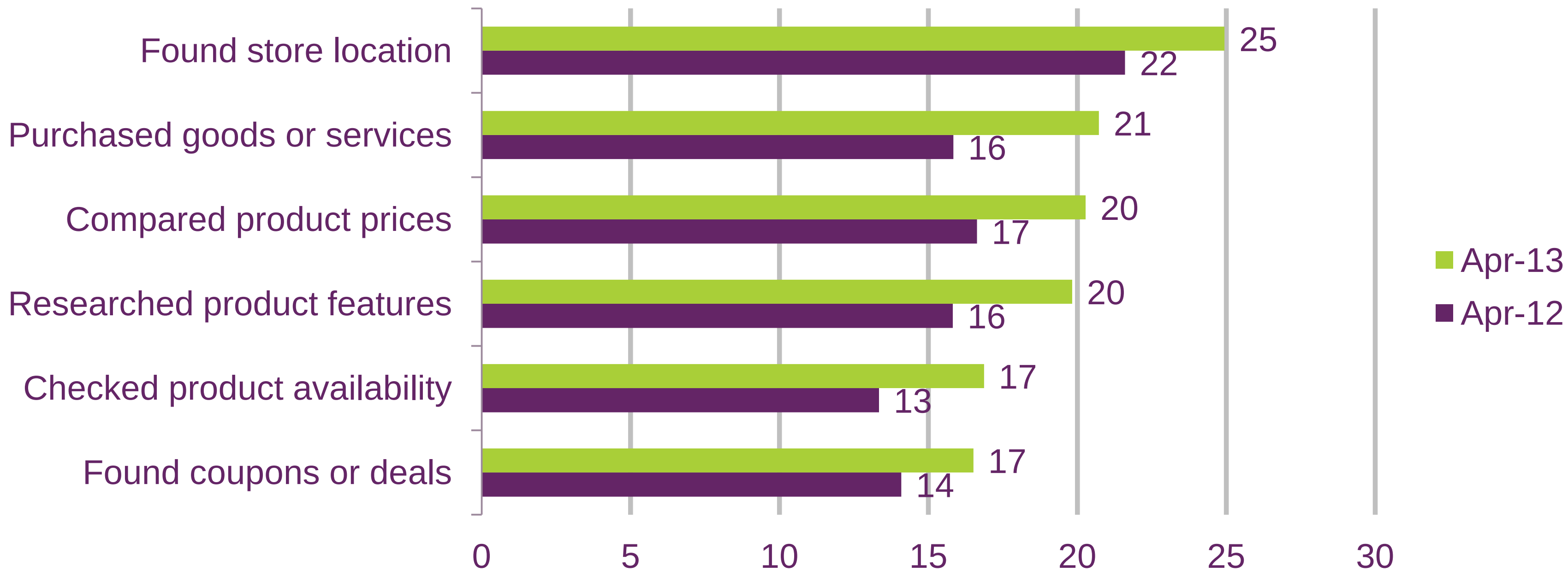


Source: comScore GSMA MMM, UK, browser access only, on network, April 2011 to April 2013

Figure 4.54

Mobile retail activities conducted by mobile internet users

Mobile internet users (%)

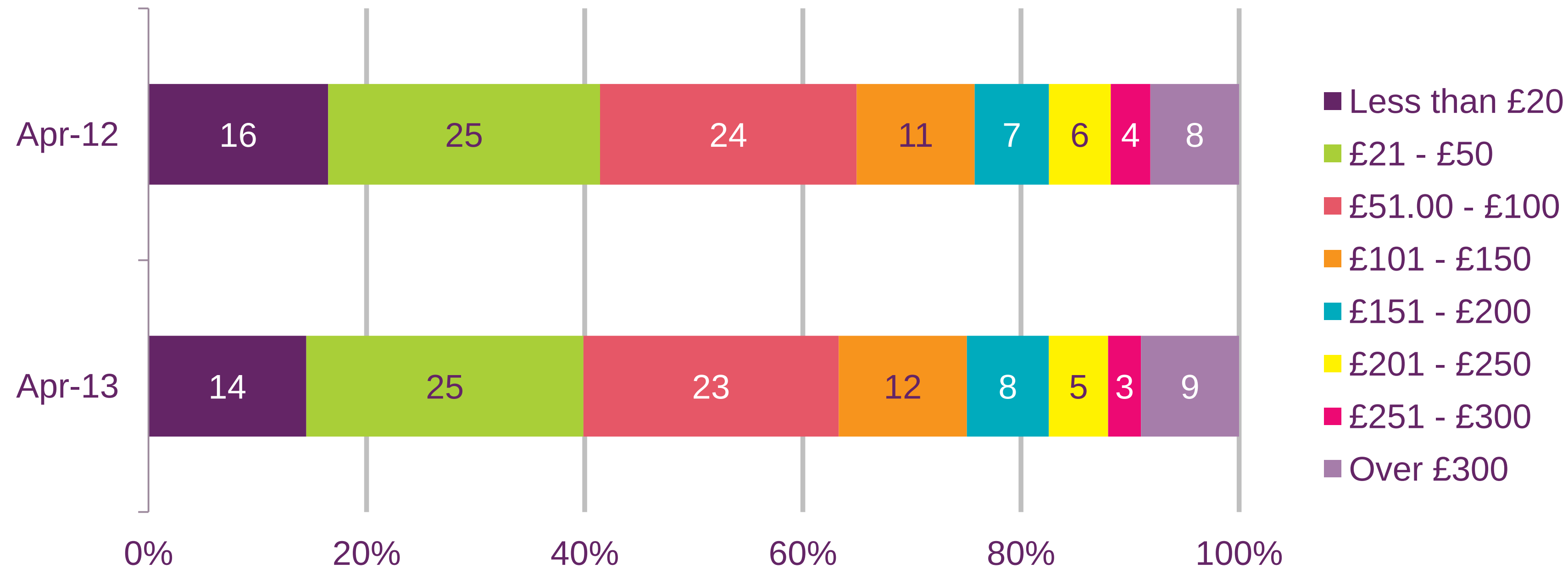


Source: comScore MobiLens, UK, 3 month averages ending April 2013 and April 2012
Base: mobile internet users 13+

Figure 4.55

Amount spent on goods and services among mobile internet shoppers

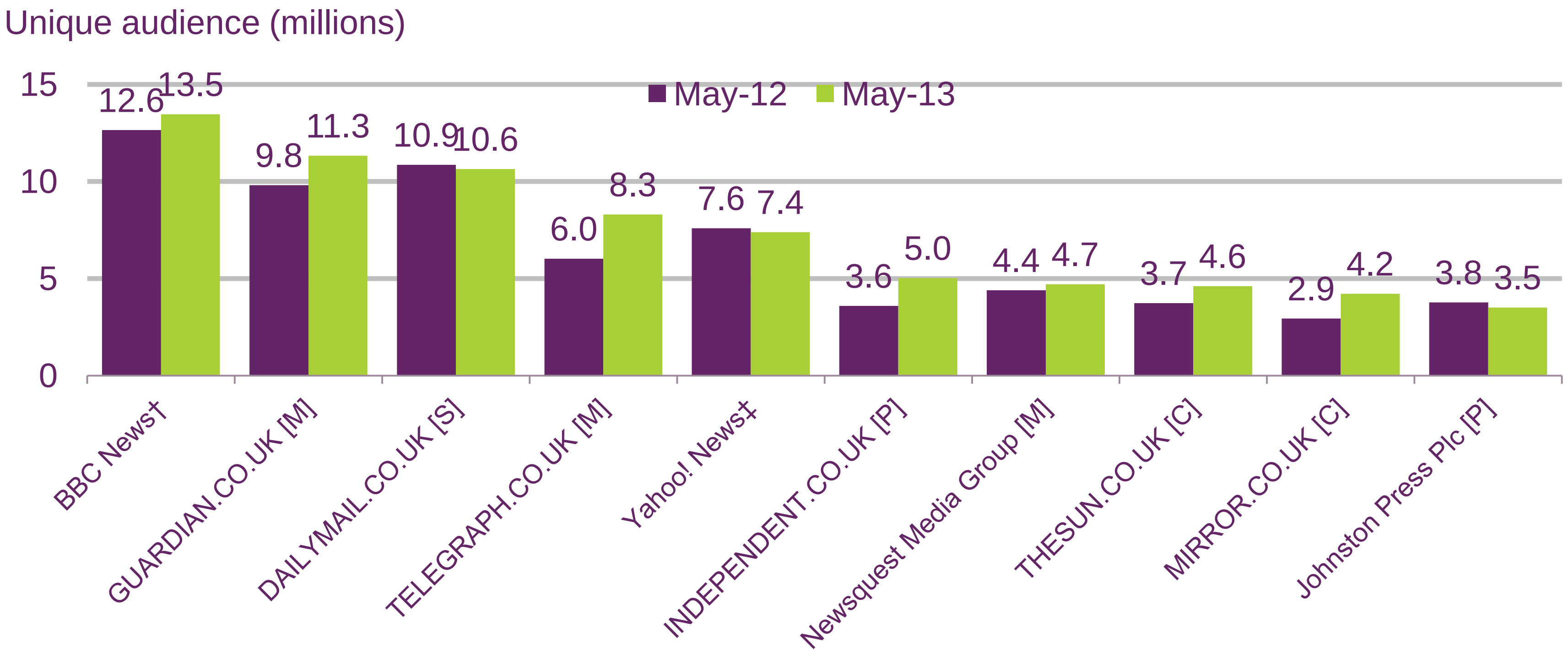
Mobile internet shoppers (%)



Source: comScore MobiLens, UK, 3 month averages ending April 2013 and April 2012
Base: mobile internet users 13+ who have purchased goods or services

Figure 4.56

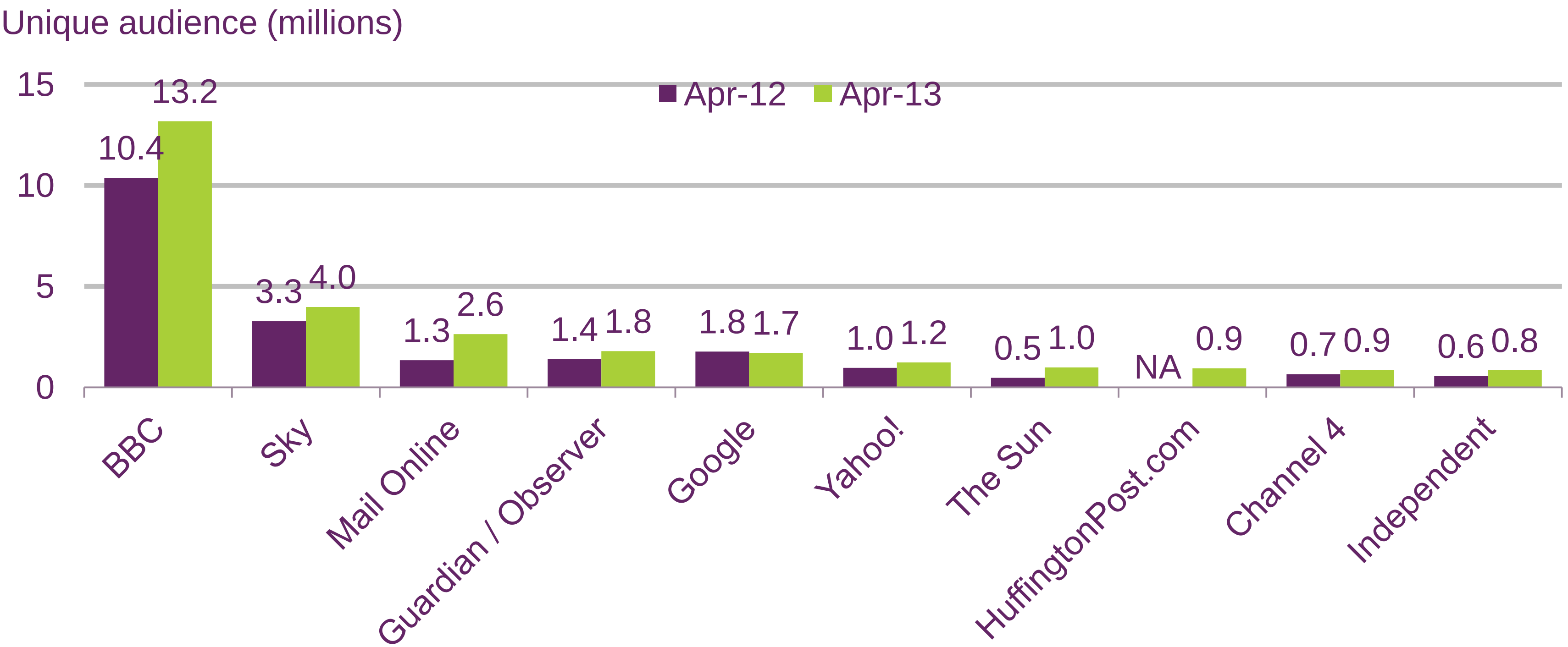
Active reach of selected news websites on laptop and desktop computers



Source: comScore MMX, UK, home and work panel, May 2012 and May 2013
† The unduplicated audience of BBC News [C] and BBC.co.uk Home Page [C]
‡ The unduplicated audience of Yahoo! News [S] and Yahoo! Finance [S]

Figure 4.57

Unique audience of selected news brands on mobile for world/national/ local news



Source: comScore MobiLens, UK, 3 month averages ending April 2013 and April 2012
Base: mobile internet users 13+

Figure 4.58

Frequency of accessing news among mobile internet users

Source: comScore MobiLens, UK, 3 month averages ending April 2013 and April 2012
Base: mobile internet users 13+

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