

4. Internet and web-based content

Figure 4.1

UK internet and web-based content market: key statistics

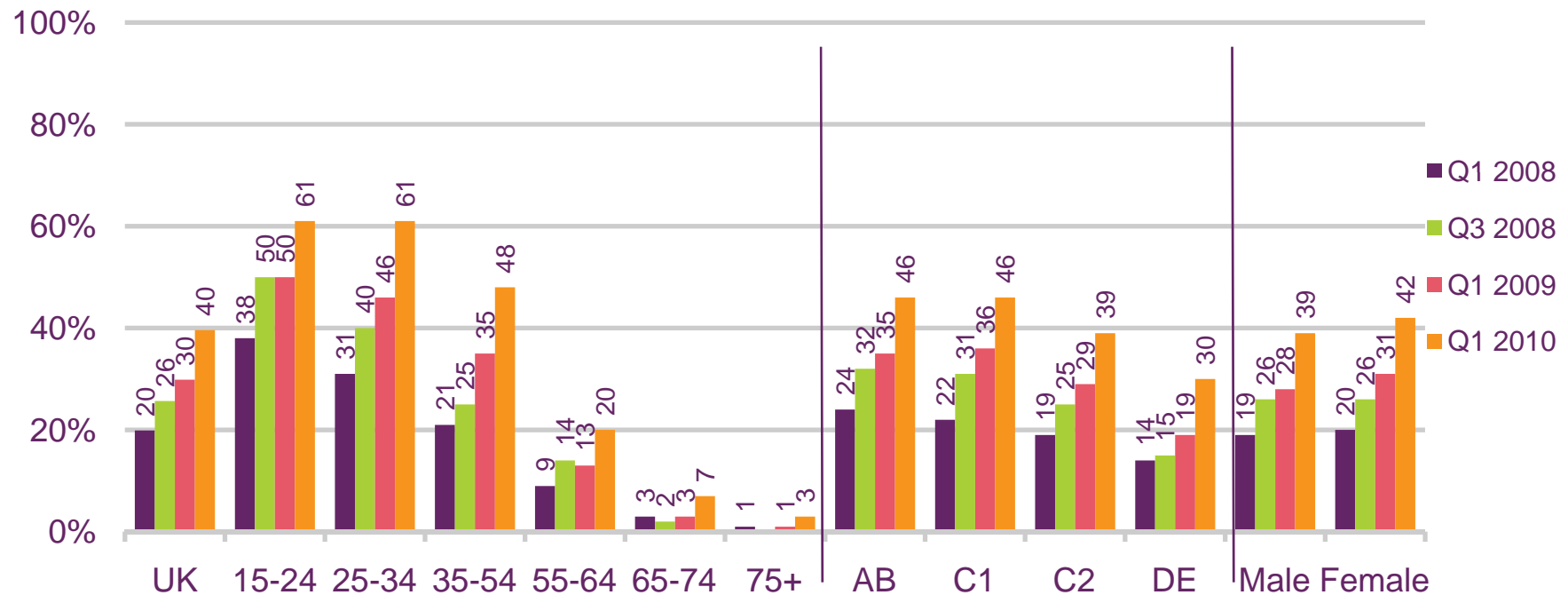
UK internet & web-based content market	2005	2006	2007	2008	2009	2010
PC / laptop take-up (%)	68	67	71	72	74	76
Internet take-up (%)	60	60	64	67	70	73
Total broadband take-up (%)	31	41	52	58	68	71
Fixed broadband take-up (%)	n/a	n/a	n/a	n/a	65	65
Mobile broadband take-up (%)	n/a	n/a	n/a	n/a	12	15
Social networking site take-up (%)	n/a	n/a	n/a	20	30	40
Use of mobile phone for web/data access (%)	n/a	n/a	n/a	20	20	23
Internet advertising expenditure	£1.4bn	£2.0bn	£2.8bn	£3.4bn	£3.5bn	n/a
Mobile media advertising revenue	£0.02m	£0.12m	£0.38m	£1.04m	£1.03m	n/a

Source: Ofcom / IABUK/PwC / Screen Digest.

Note: Mobile media includes mobile TV, mobile VoD and mobile games and excludes display and search advertising.

Figure 4.2

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?

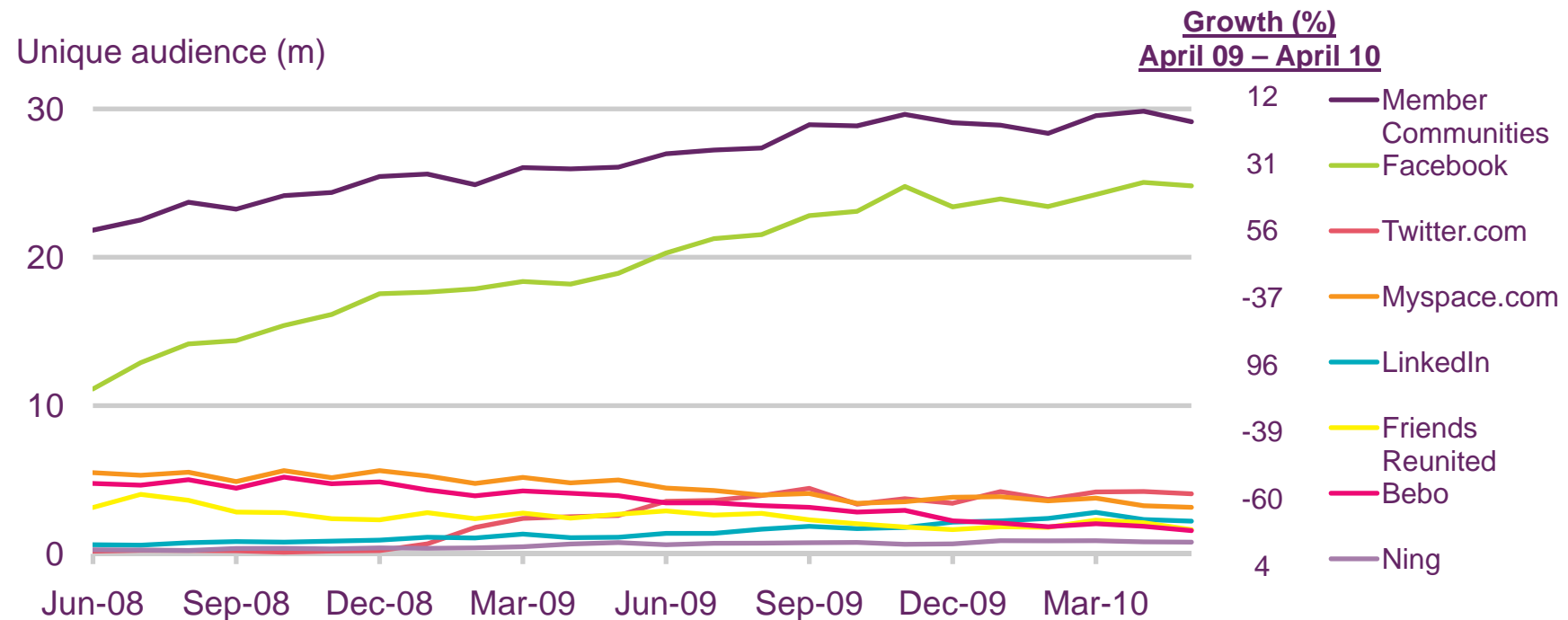
Source: Ofcom technology tracker, Q1 2010

Base: All adults aged 15+ (n = 5812 Q1 2008, 1581 Q3 2008, 6090 Q1 2009, 9013 Q1 2010)

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 4.3

Unique audience of selected social networking sites

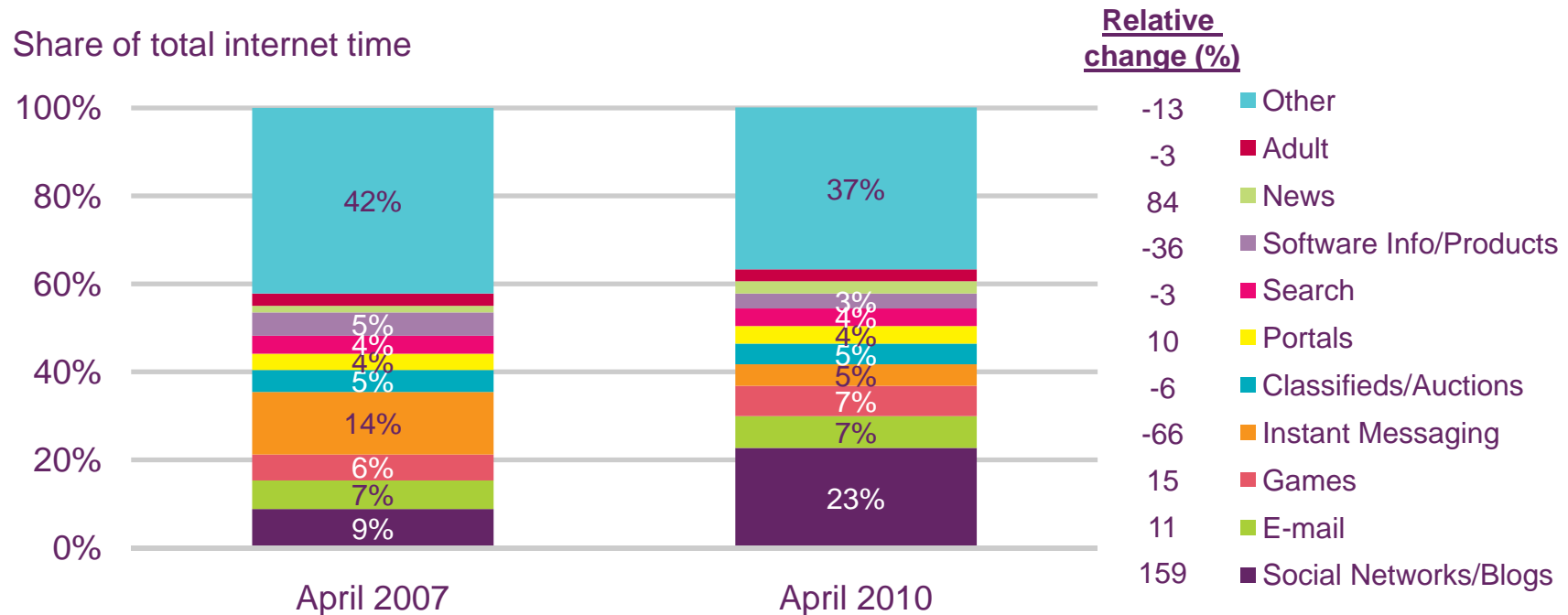


Source: UKOM/Nielsen.

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 4.4

UK internet sectors' share of total internet time



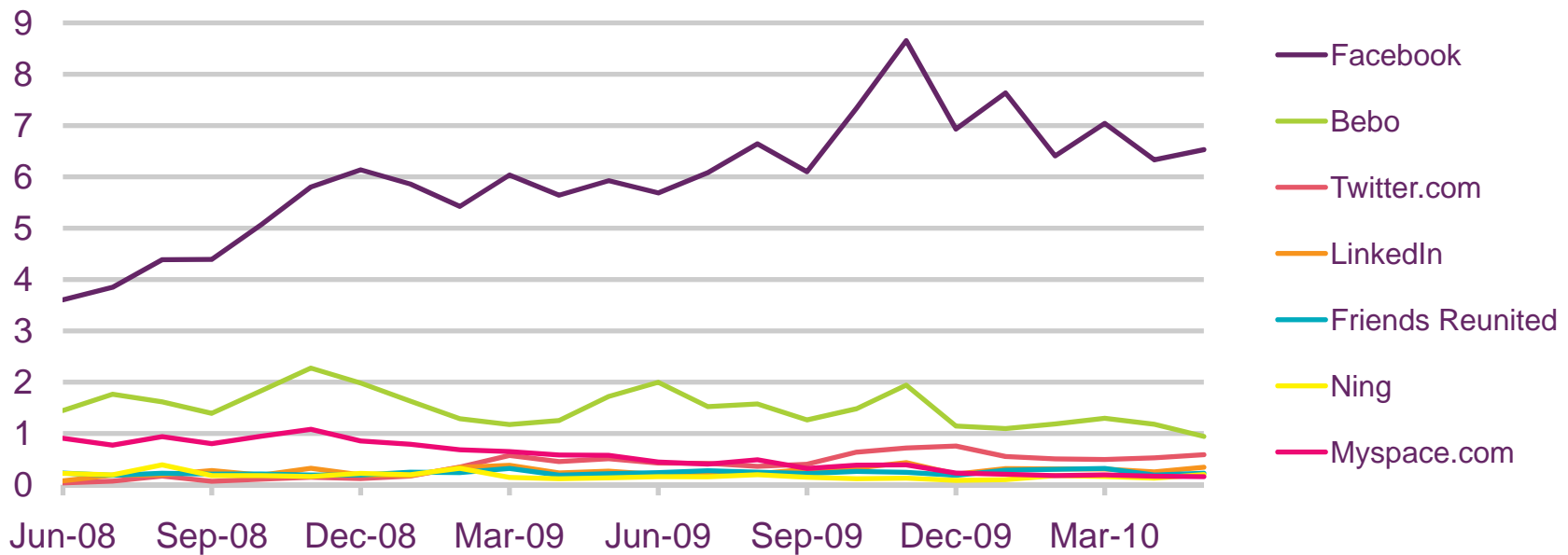
Source: UKOM/Nielsen.

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

Figure 4.5

Time per user per month spent on selected social networking sites

Time per person (hrs)

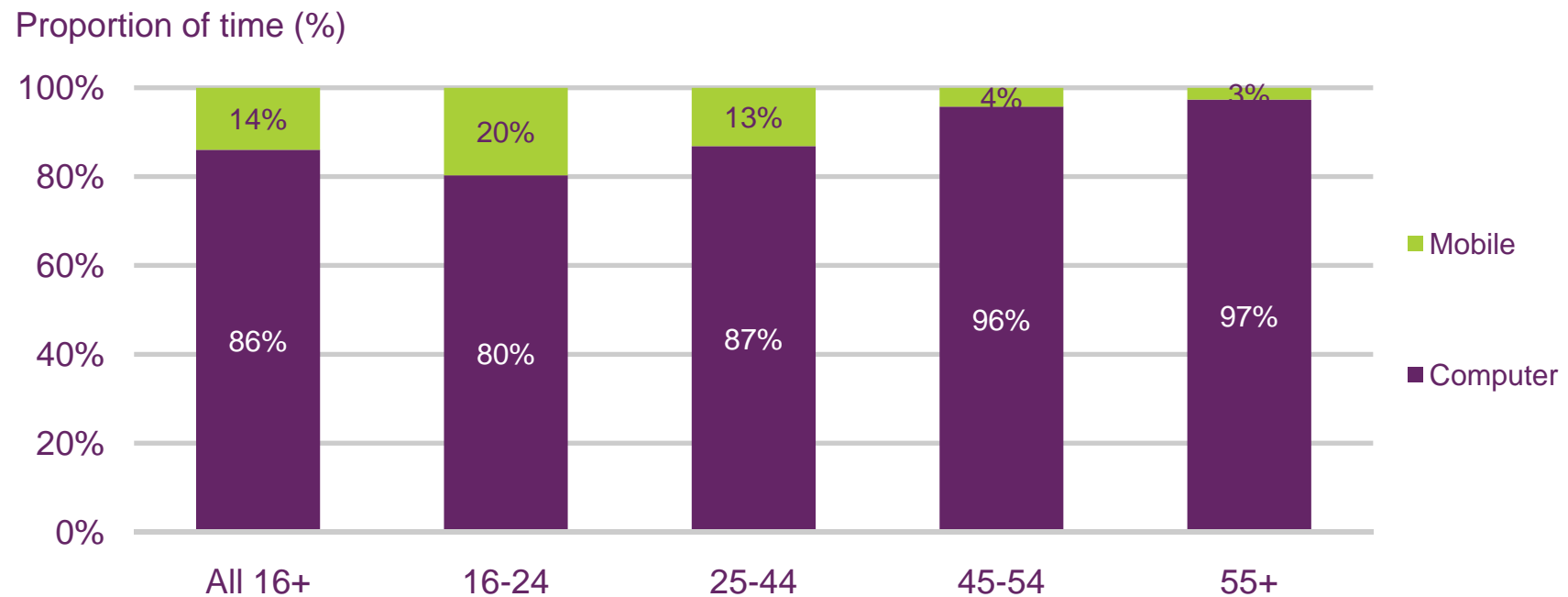


Source: UKOM/Nielsen.

Note: home and work panel, applications included.

Figure 4.6

Proportion of time spent social networking, by device

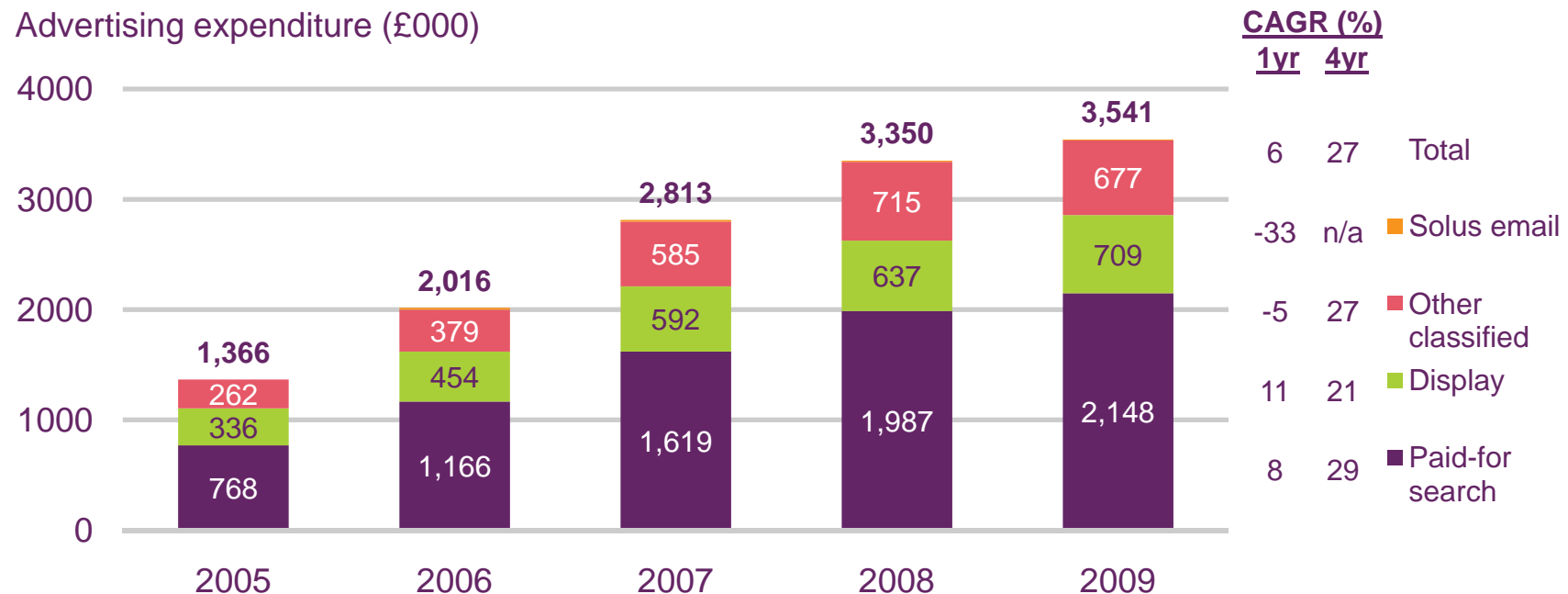


Source: Source: Ofcom research.

Base = All respondent days: 16+ = 7966; 16-24s = 1106; 25-44s = 3003; 45-54s = 1484; 55+ = 2373

Figure 4.7

Internet advertising expenditure, by category



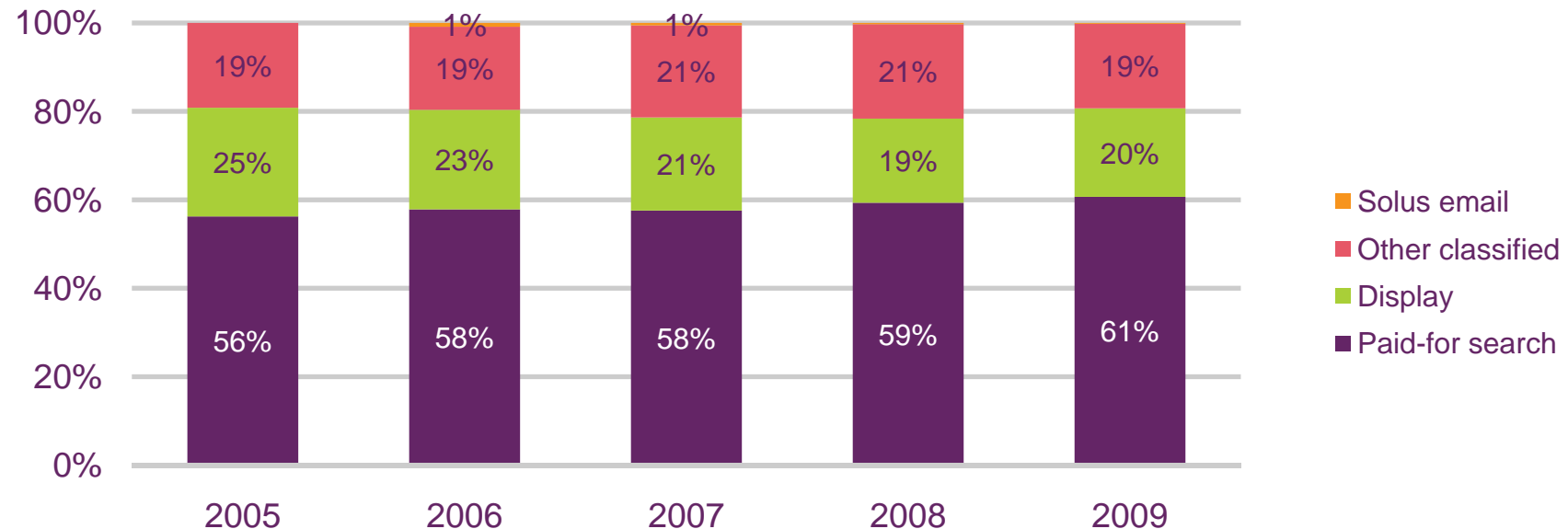
Source: IABUK/PwC.

Note: CAGR = compound annual growth rate. Solus email is an opt-in form of advertising where the body of the email is determined by the advertiser, and is sent on their behalf by an email list manager/owner.

Figure 4.8

Distribution of internet advertising expenditure by category

Expenditure share (%)

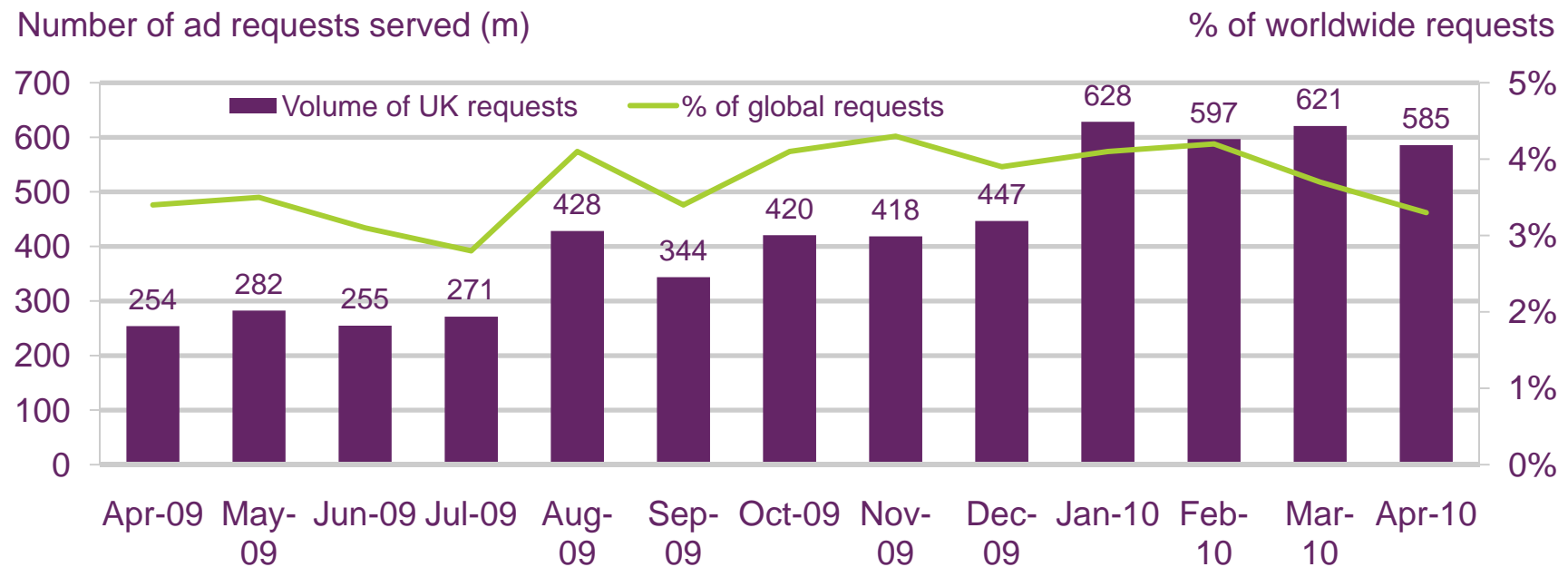


Source: IABUK/PwC.

Note: CAGR = compound annual growth rate. Solus email is an opt-in form of advertising where the body of the email is determined by the advertiser, and is sent on their behalf by an email list manager/owner.

Figure 4.9

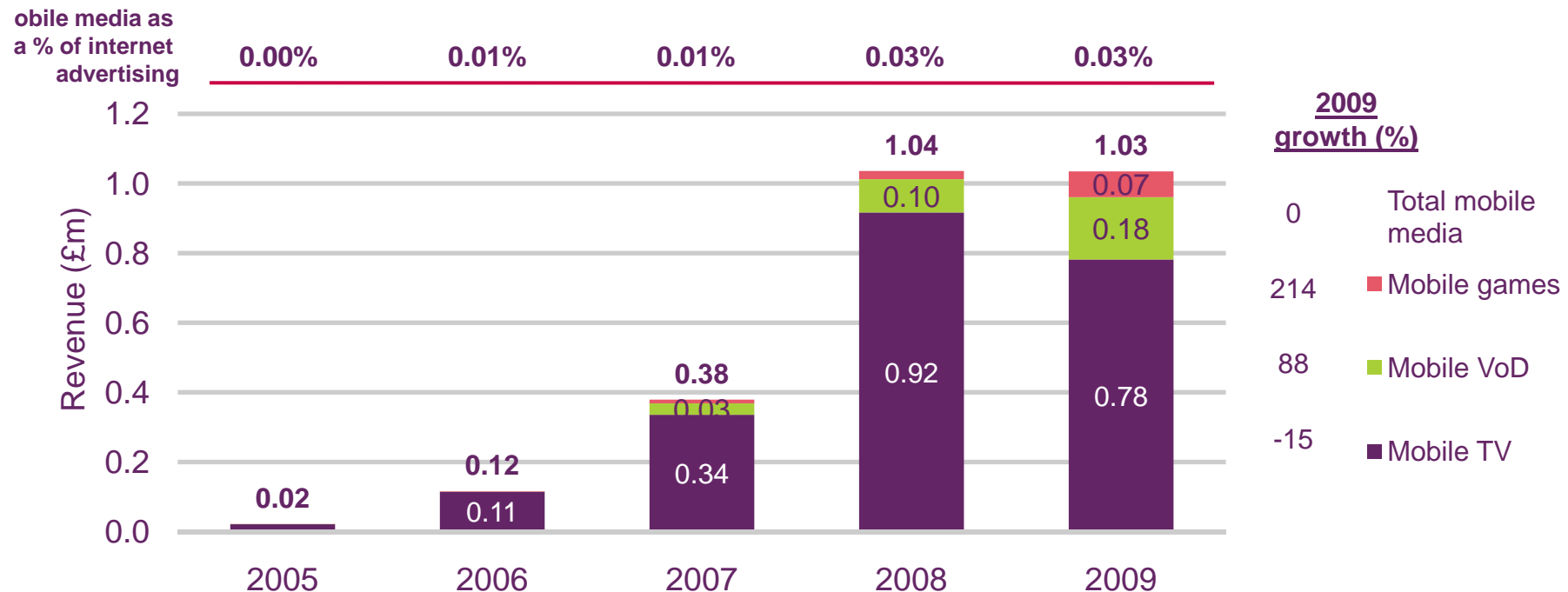
Ad requests served by Admob



Source: Admob metrics.

Figure 4.10

Mobile media advertising revenues

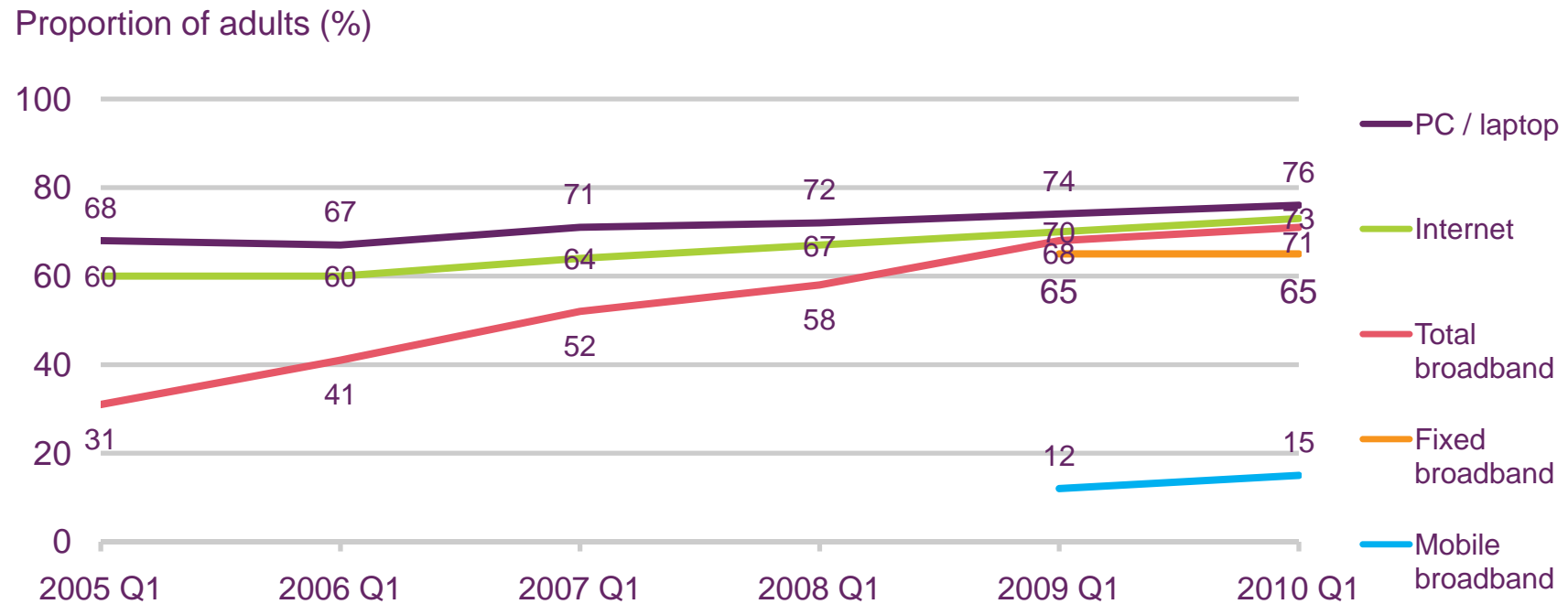


Source: Screen Digest / Ofcom / IABUK

Note: Total mobile media advertising revenues include revenues from mobile TV, mobile VoD and mobile games and exclude display and search advertising.

Figure 4.11

Household PC and internet take-up, 2005-2010



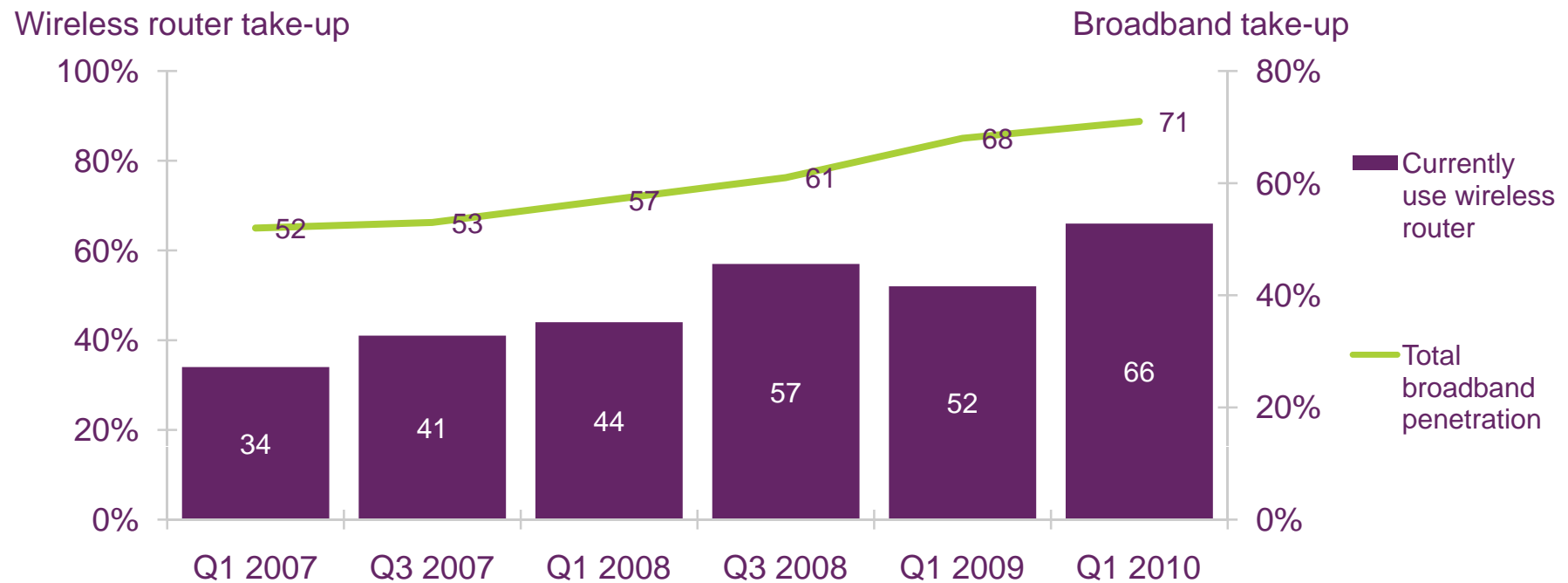
QE1: Does your household have a PC or laptop computer? / QE2: Do you or does anyone in your household have access to the Internet/Worldwide Web at HOME (via any device, e.g. PC, mobile phone etc)? / QE6: Which of these methods does your household use to connect to the Internet at home?

Source: Ofcom technology tracker, Q1 2010.

Base: All adults aged 15+ (n=9013).

Figure 4.12

Use of wireless router vs. broadband take-up, 2007-2010



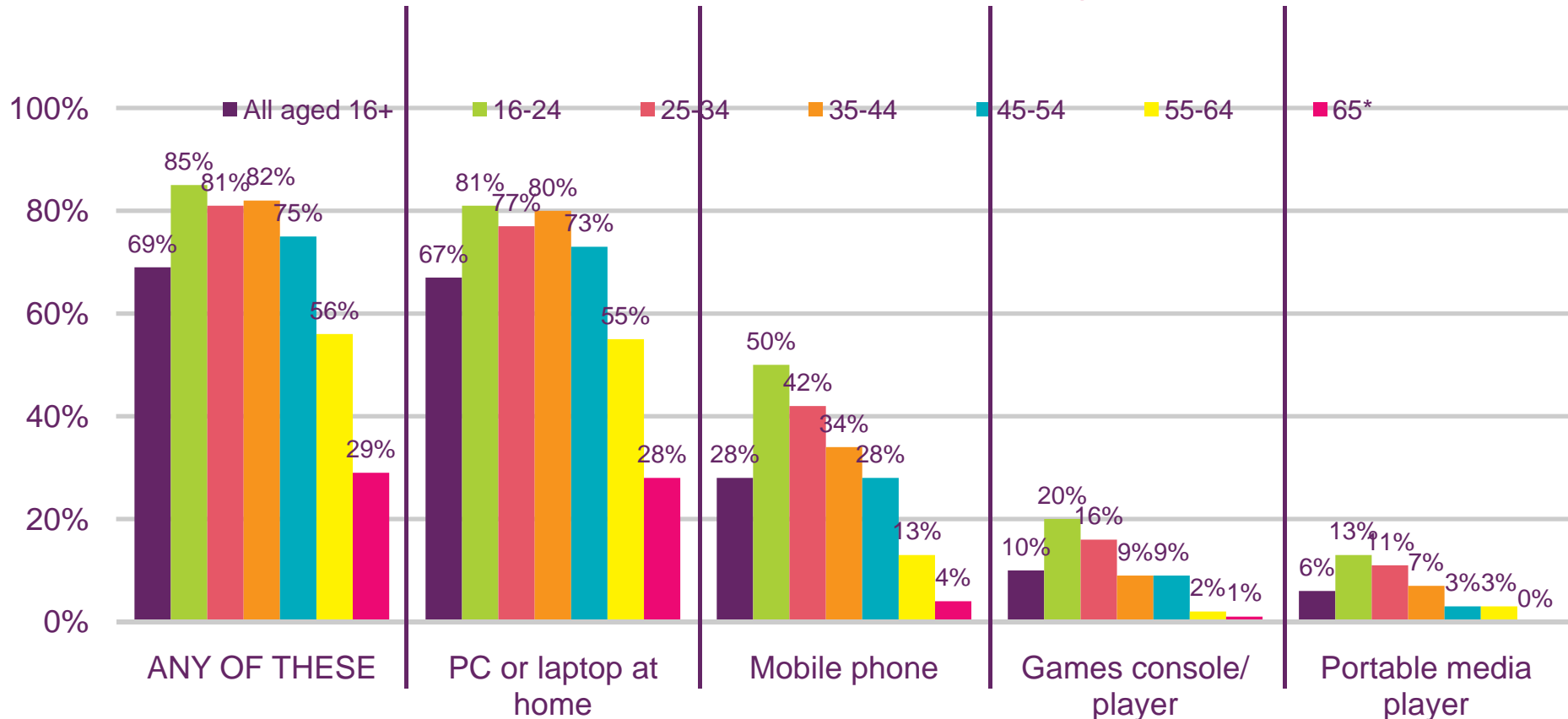
Source: Ofcom research, Quarter 1 2010

Base: Adults aged 15+ 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 15+

Figure 4.13

Devices used to visit internet websites in 2009, 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)

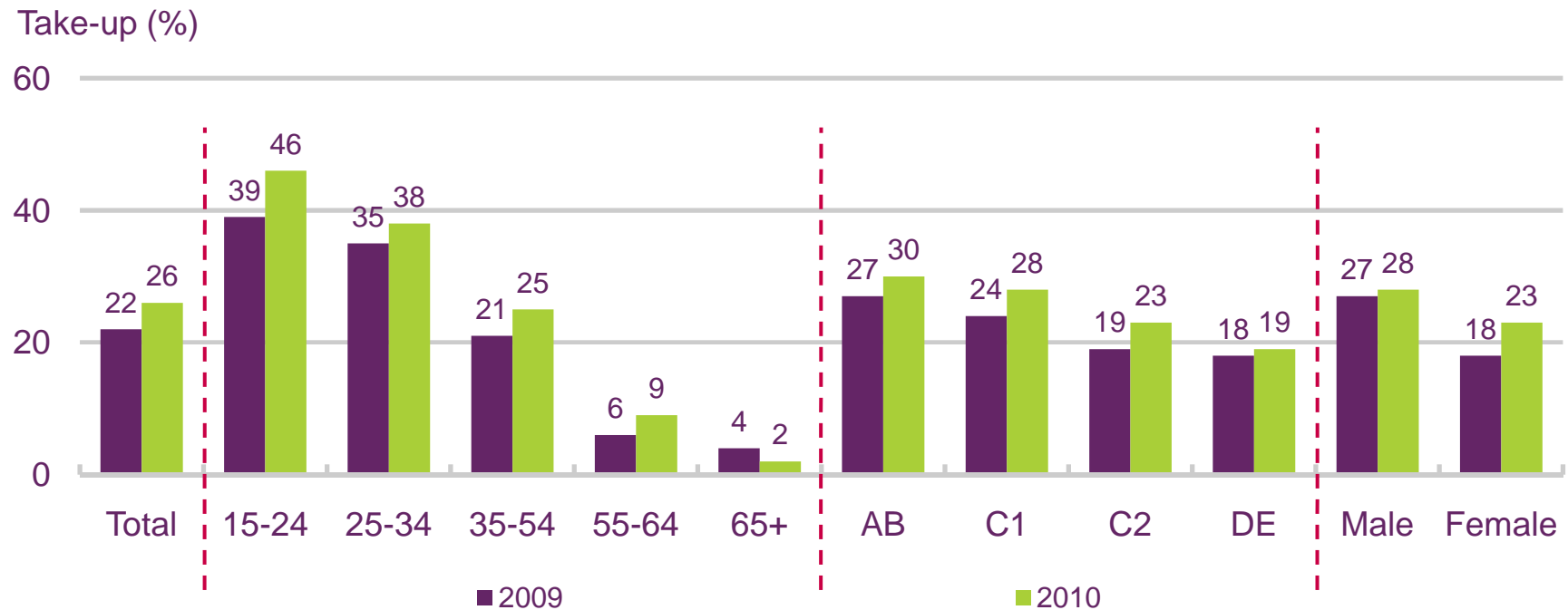
Base: All adults aged 16+ (1824 aged 16+, 253 aged 16-24, 274 aged 25-34, 374 aged 35-44, 274 aged 45-54, 276 aged 55-64, 373 aged 65+).

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 2009

Figure 4.14

Use of mobile phones for web/data access



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 2010.

Base: all adults 15+ (n = 9013 UK, 1351 15-24, 1378 25-34, 3038 35-54, 1334 55-64, 1912 65+).

Note: Web/data access includes accessing the internet, downloading and streaming content, connecting using WiFi and using VoIP.

Figure 4.15

Confidence and interest in mobile phone functions



M3A-M3E – I'm going to read out some different types of things that you can do with some kinds of mobile phone, and for each one I'd like you to say which of the options on the card applies to you.

Base: Adults aged 16+ with a mobile phone (1632)

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 4.16

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



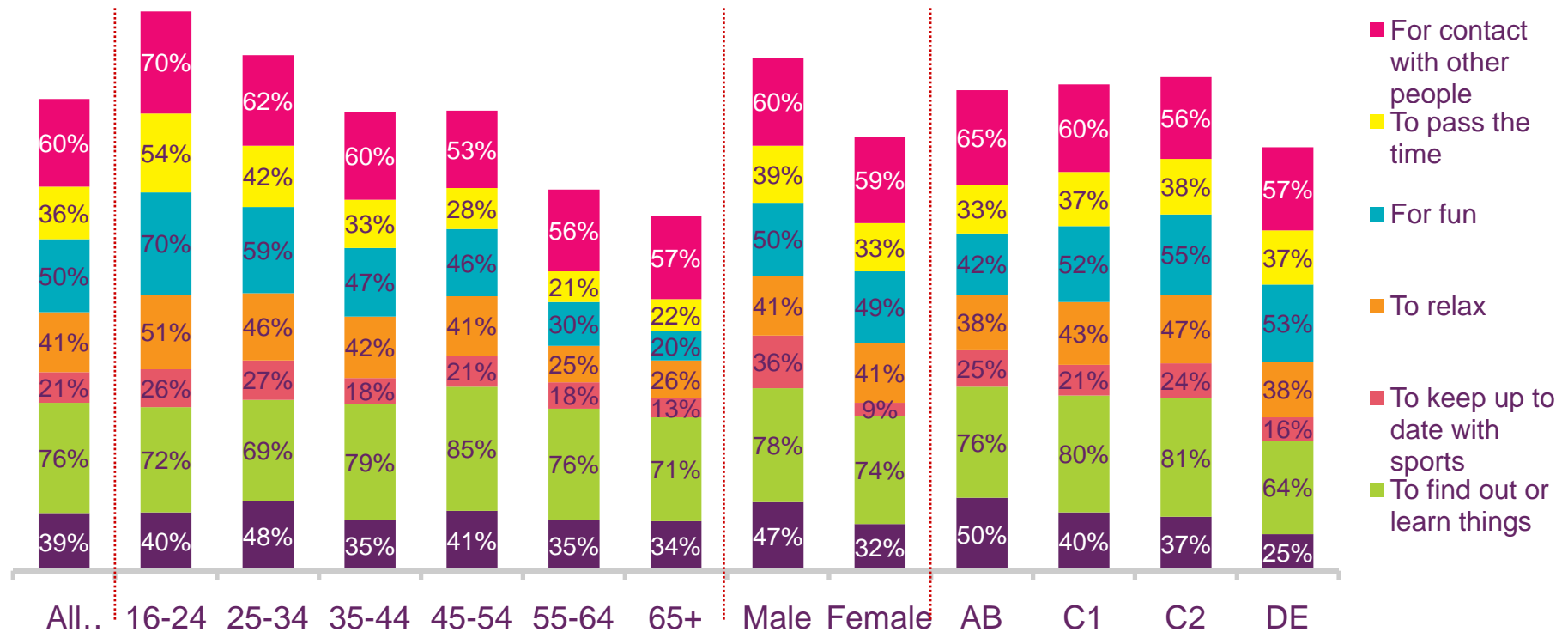
QE2: Do you or does anyone in your household have access to the internet/Worldwide Web at home?

Source: Ofcom technology tracker, Q1 2010.

Base: all adults 15+ (n = 9013 UK, 1351 15-24, 1378 25-34, 3038 35-54, 1334 55-64, 1109 65-74, 803 75+, 2029 AB, 2631 C1, 1735 C2, 2569 DE, 4298 male, 4715 female).

Figure 4.17

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



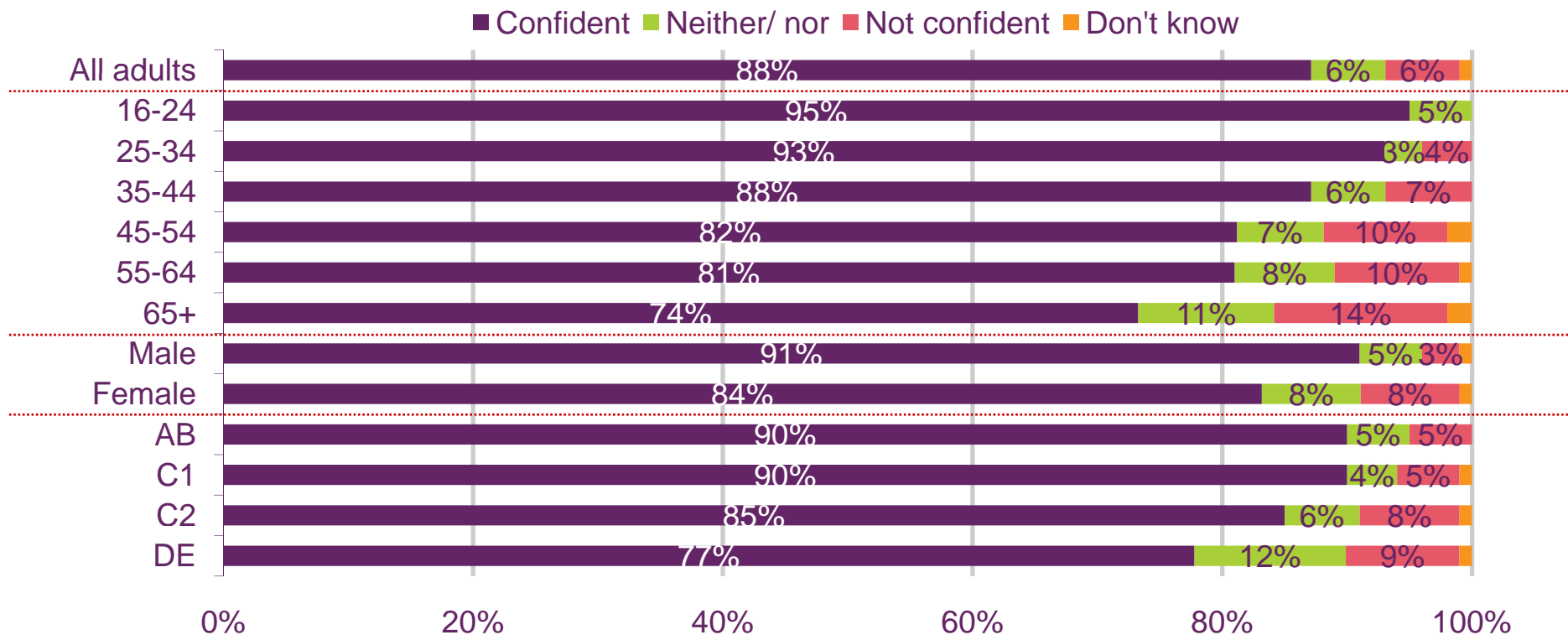
IN42 – Which, if any of these are reasons why you use the internet? (prompted responses, multi-coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+ in 2009, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 4.18

Confidence as an internet user in 2009, by age, gender and SEG



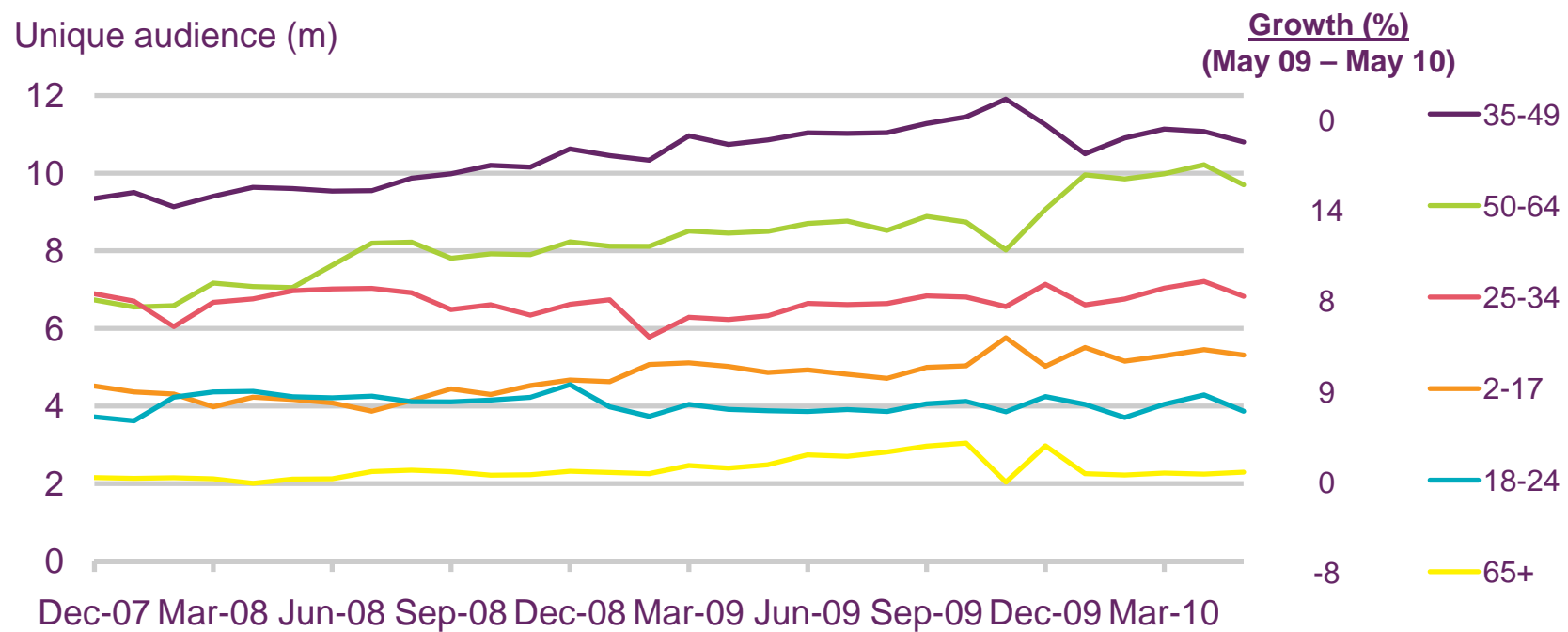
IN10D – Overall then, how confident are you as an internet user? (Prompted responses, single coded)

Base: All adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+, 615 male, 667 female, 341 AB, 417 C1, 232 C2, 290 DE). Significance testing shows any differences between any age group and all adults aged 16+, between males and females, between any socio-economic group and all adults aged 16+.

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 4.19

Active online universe, by age



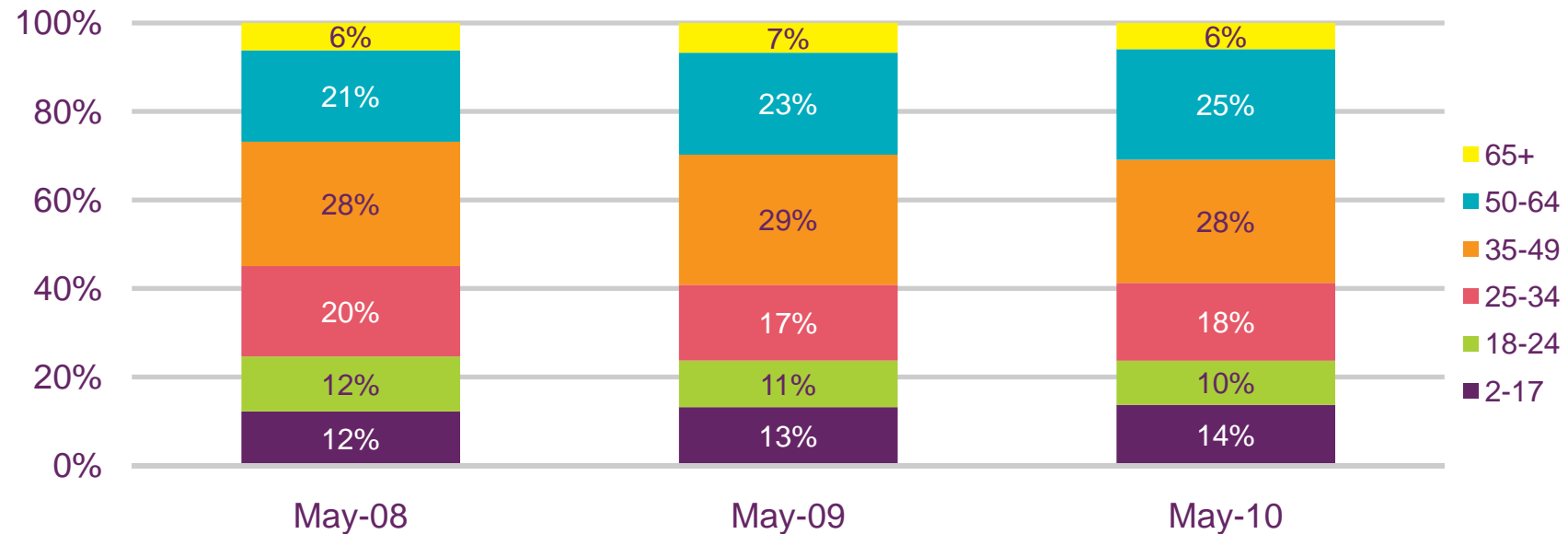
Source: UKOM/Nielsen, home and work panel, applications included.

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

Figure 4.20

Share of active online universe, by age

Share of unique audience



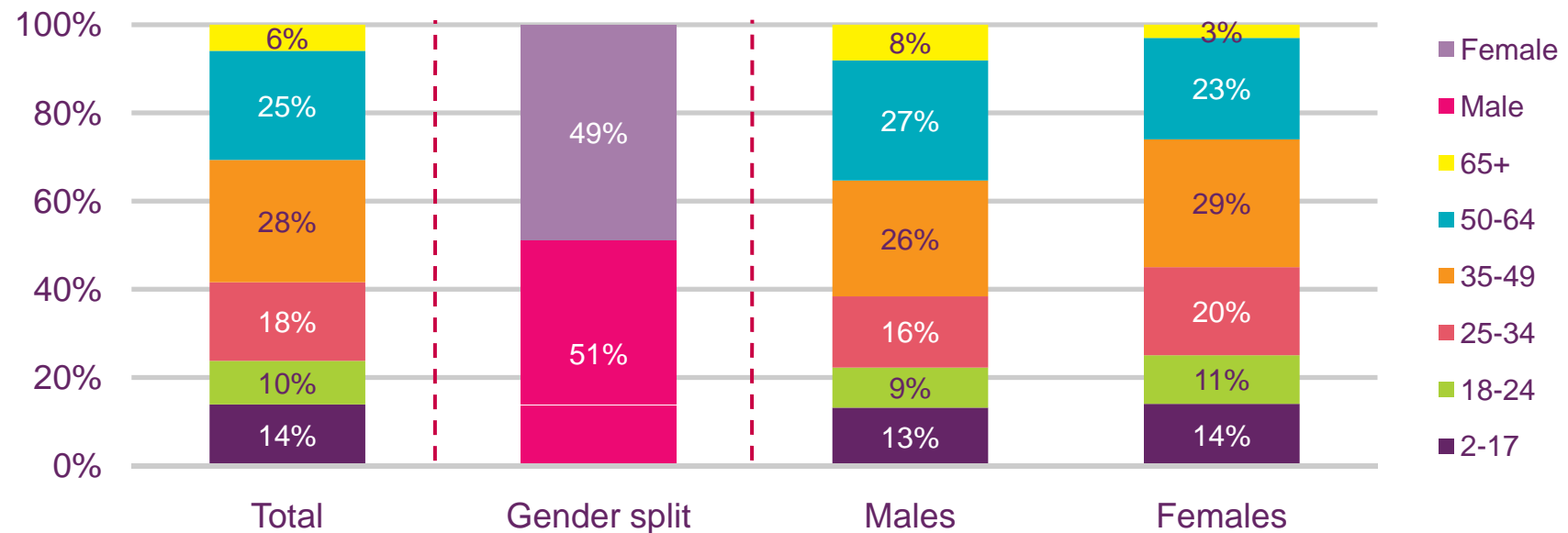
Source: UKOM/Nielsen, home and work panel, applications included, month of May 2010.

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

Figure 4.21

Share of active online universe, by age and gender

Share of active universe

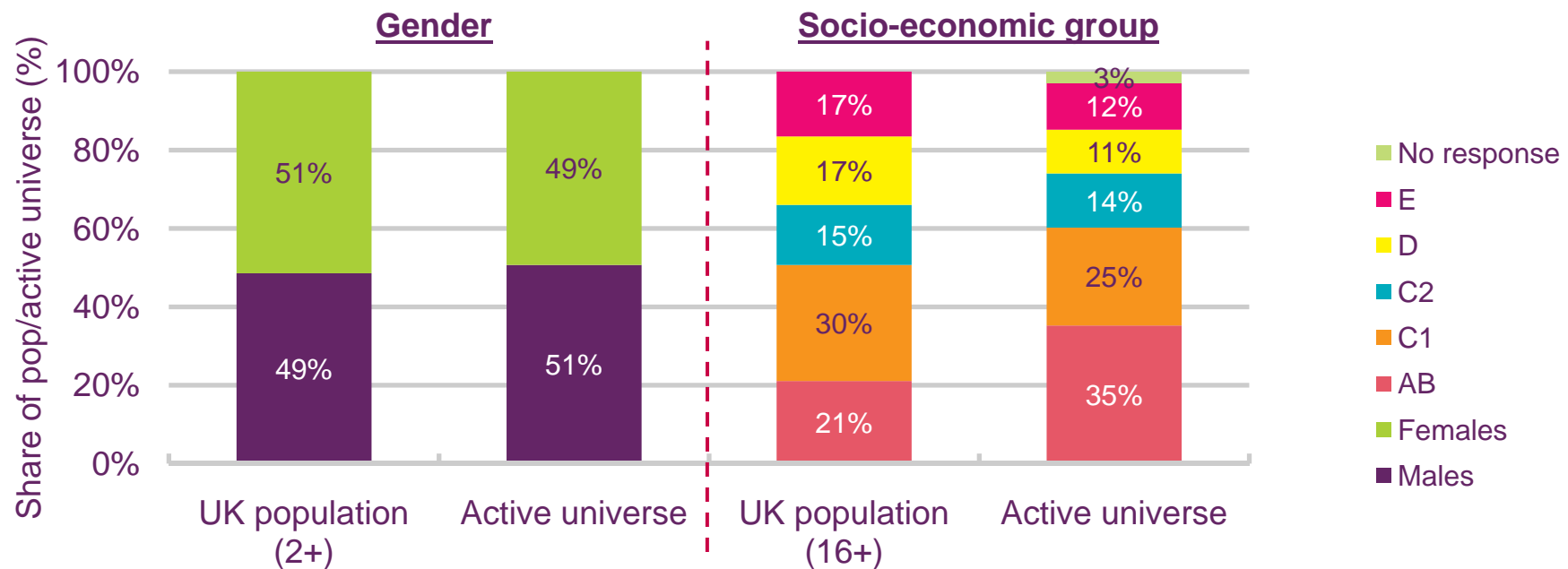


Source: UKOM/Nielsen, home and work panel, applications included, month of May 2010.

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

Figure 4.22

Gender and demographic breakdown of active online universe

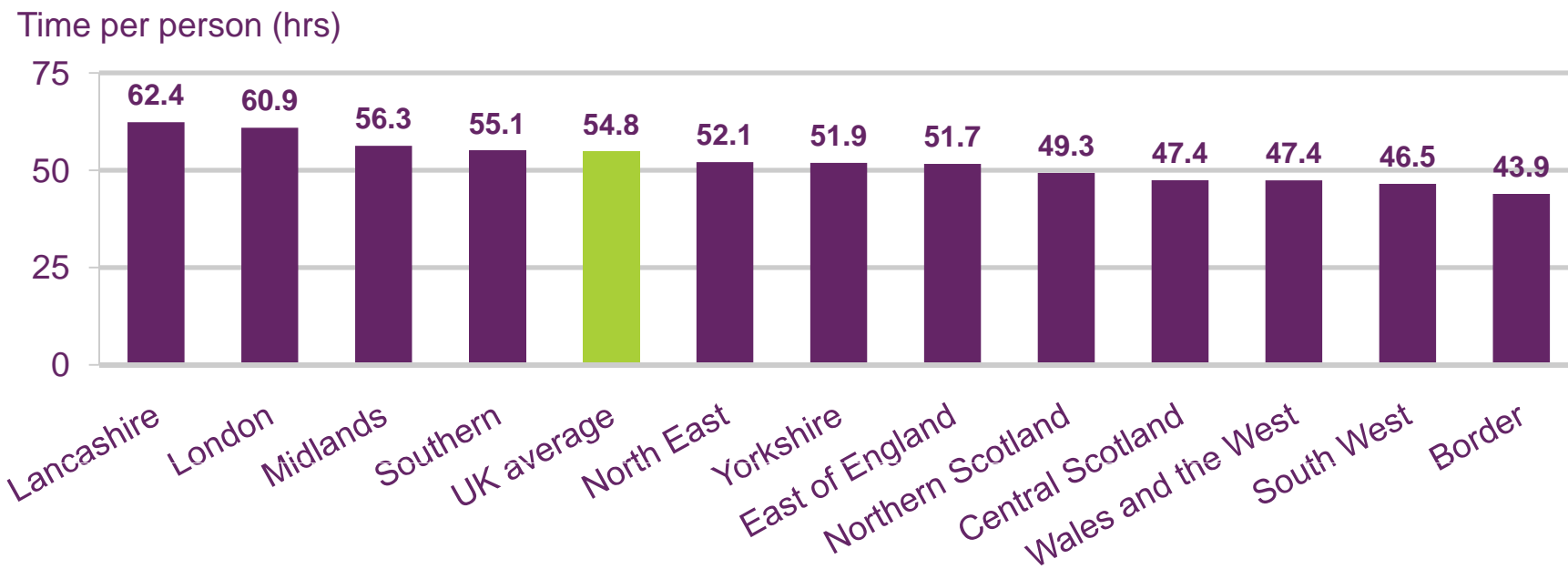


Source: ONS/UKOM, home and work panel, applications included.

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

Figure 4.23

Monthly internet-enabled PC time per user, by region

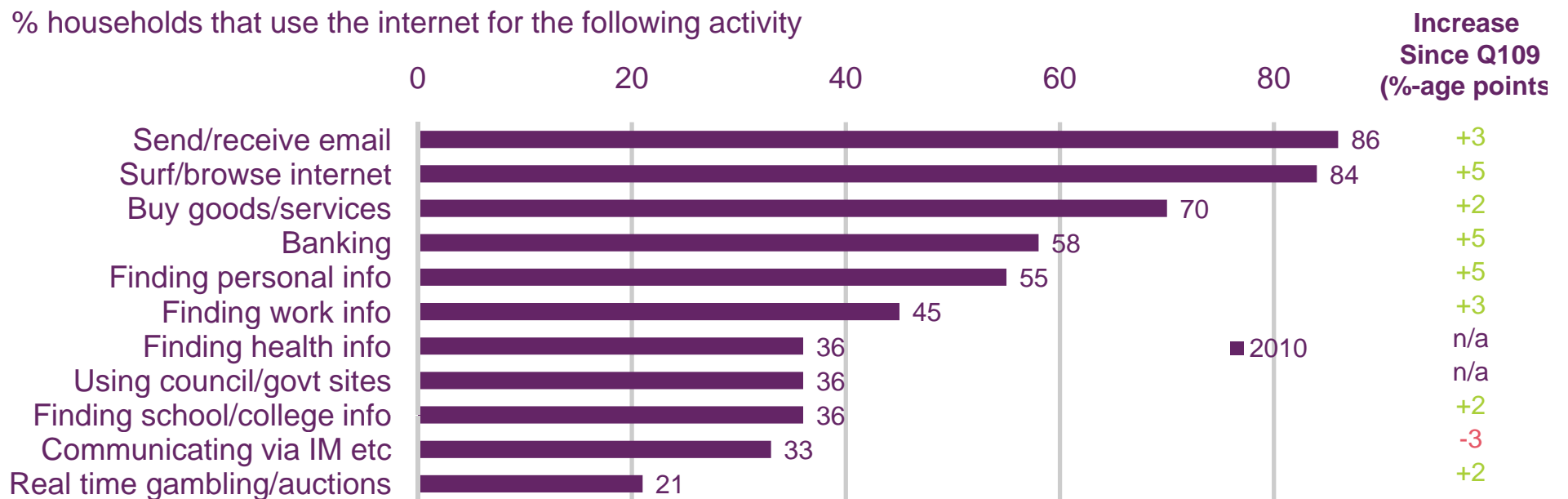


Source: UKOM, home and work panel, applications included. Month of May 2010. Regions based on ISBA regions.

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

Figure 4.24

Claimed use of the internet for selected activities



QE10A: Which, if any, of these do you or members of your household use the internet for while at home?

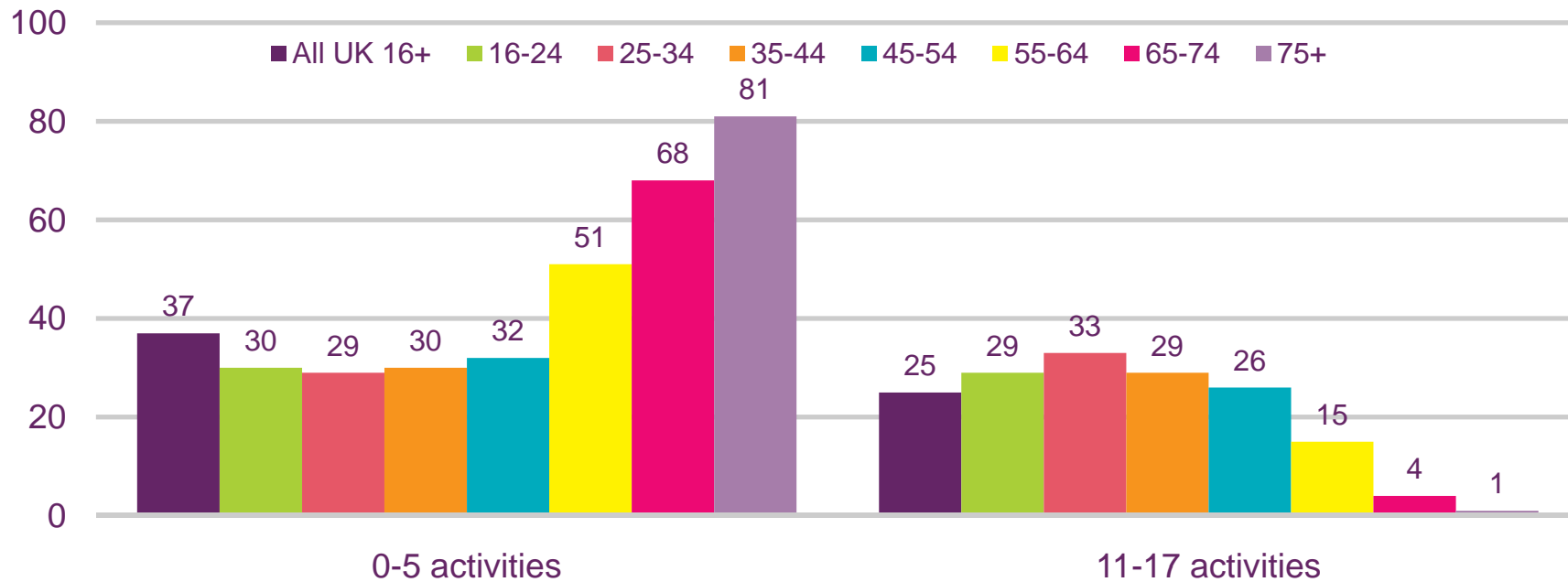
Source: Ofcom technology tracker, Q1 2010.

Base: All with internet access (n=6163).

Figure 4.25

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 2010

Base: all home internet users (n=6946).

Figure 4.26

Consumers' agreement/disagreement on use of online services

Proportion of respondents (%)



Q: How much do you agree or disagree... I am more likely to read free newspapers or catch up with the news and sport online than purchase a newspaper. I am more likely to purchase goods and services over the internet than in shops in order to save money. I am more likely to use price comparison websites (such as uswitch.com or pricerunner.co.uk) in order to find the best deal. I am more likely to use vouchers from websites or emails offering money off goods and services. I make more telephone calls over the internet, using services like Skype, rather than using my home phone.

Source: Ofcom-commissioned research

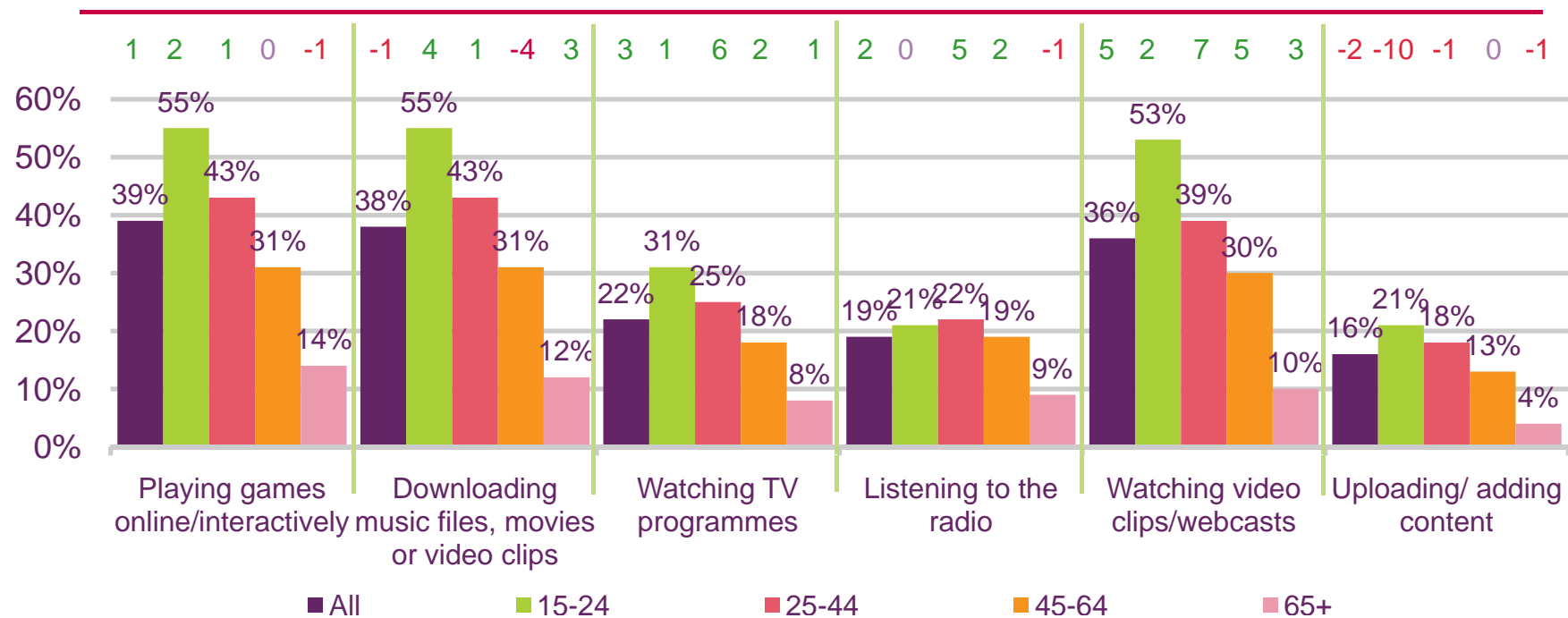
Base: All those with broadband access (n = 1554)

Figure 4.27

Engagement with online media content, by age

% of households who use the internet for the following activities

Increase in activities since Q1 2009 (percentage points)



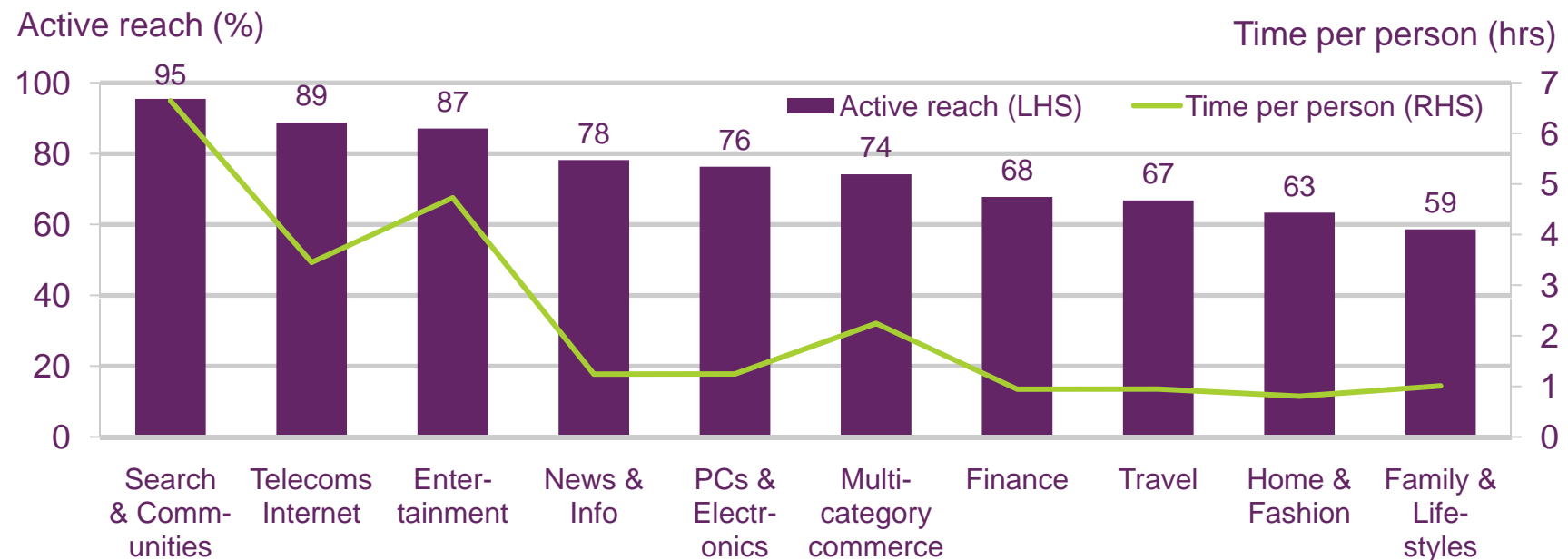
QE10A: Which, if any, of these do you or members of your household use the internet for while at home?

Source: Ofcom research, Q1 2010.

Base: All adults who have the internet at home (n= 6163).

Figure 4.28

Most popular site categories, by active reach

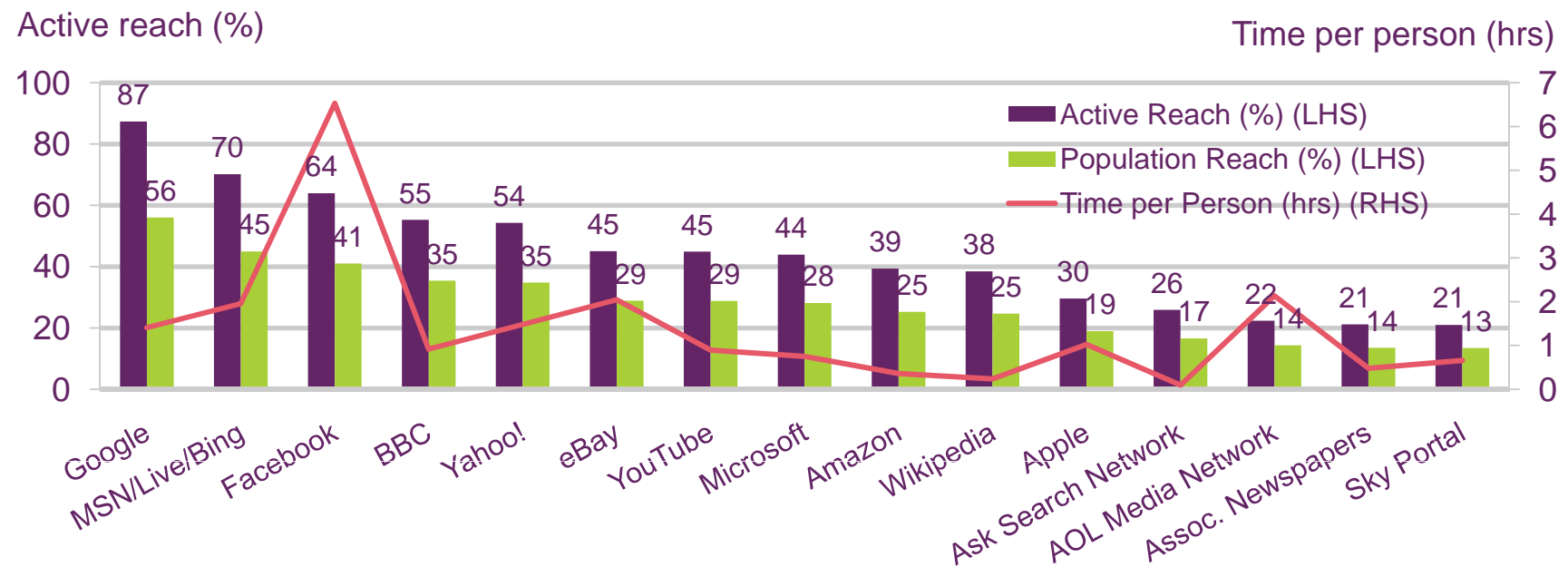


Source: UKOM home and work panel, applications included, month of May 2010.

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

Most popular online brands, by reach



Source: UKOM home and work panel, applications included, month of May 2010.

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. “Population reach” = percentage of UK population.

Figure 4.30

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	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing
4	Facebook	Facebook	Facebook	Facebook	Yahoo!	BBC
5	YouTube	Windows Live Hotmail	Yahoo!	BBC	Facebook	Yahoo!
6	BBC	YouTube	BBC	Yahoo!	BBC	Google Maps
7	Windows Live Messenger	Windows Live Messenger	Google Maps	Google Maps	Google Maps	Microsoft
8	Yahoo!	Yahoo!	YouTube	eBay	Microsoft	Amazon
9	YouTube Homepage	BBC	eBay	Microsoft	eBay	Facebook
10	Google Image Search	eBay	Windows Live Hotmail	YouTube	Amazon	Wikipedia

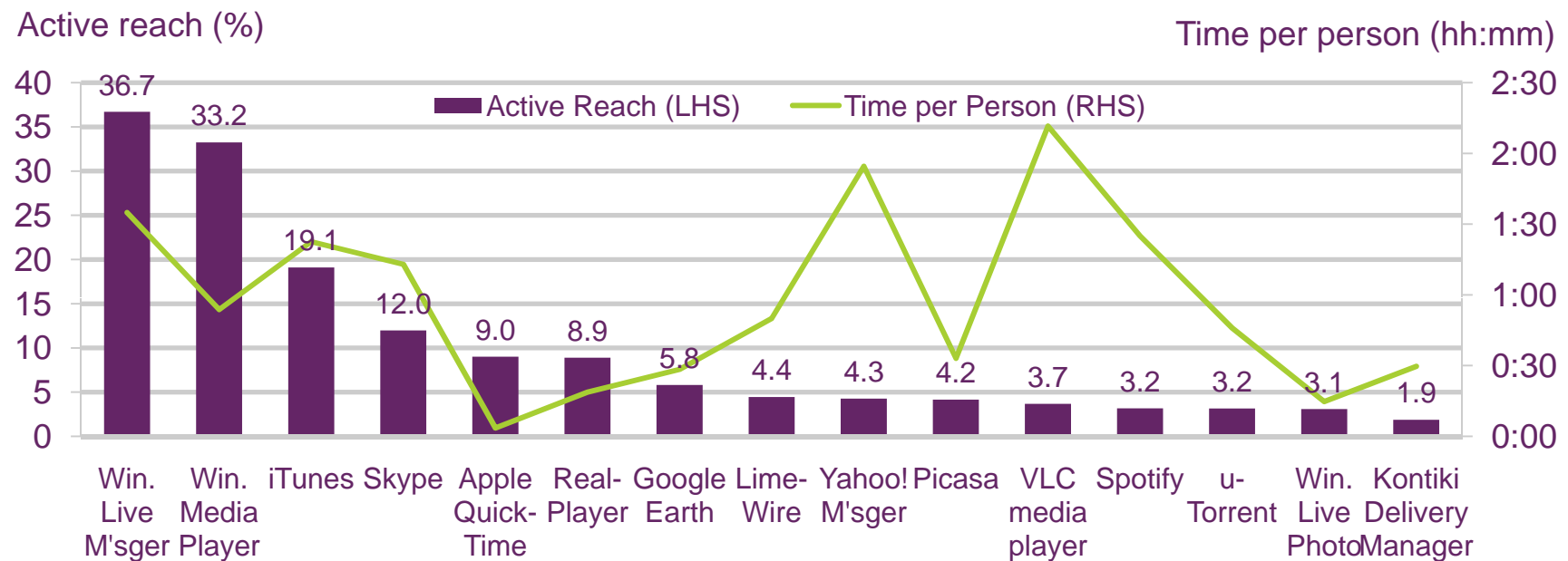
Key

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

Source: UKOM home and work panel, applications included, month of May 2010.
 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 4.31

Most popular internet applications, by active reach

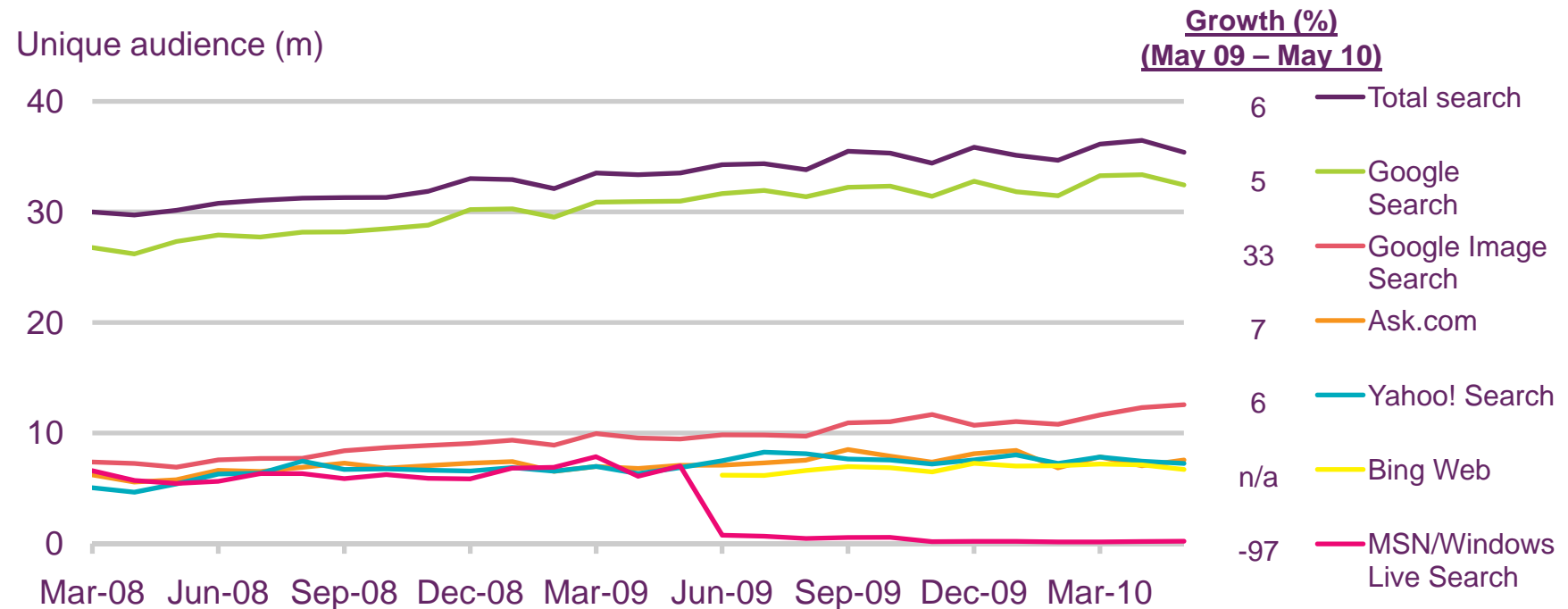


Source: UKOM home and work panel, applications included, month of May 2010.

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 4.32

Unique audience of leading search sites



Source: UKOM home and work panel, applications included, month of May 2010.

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. MSN/Windows Live search rebranded as Bing in May 2009.

Figure 4.33



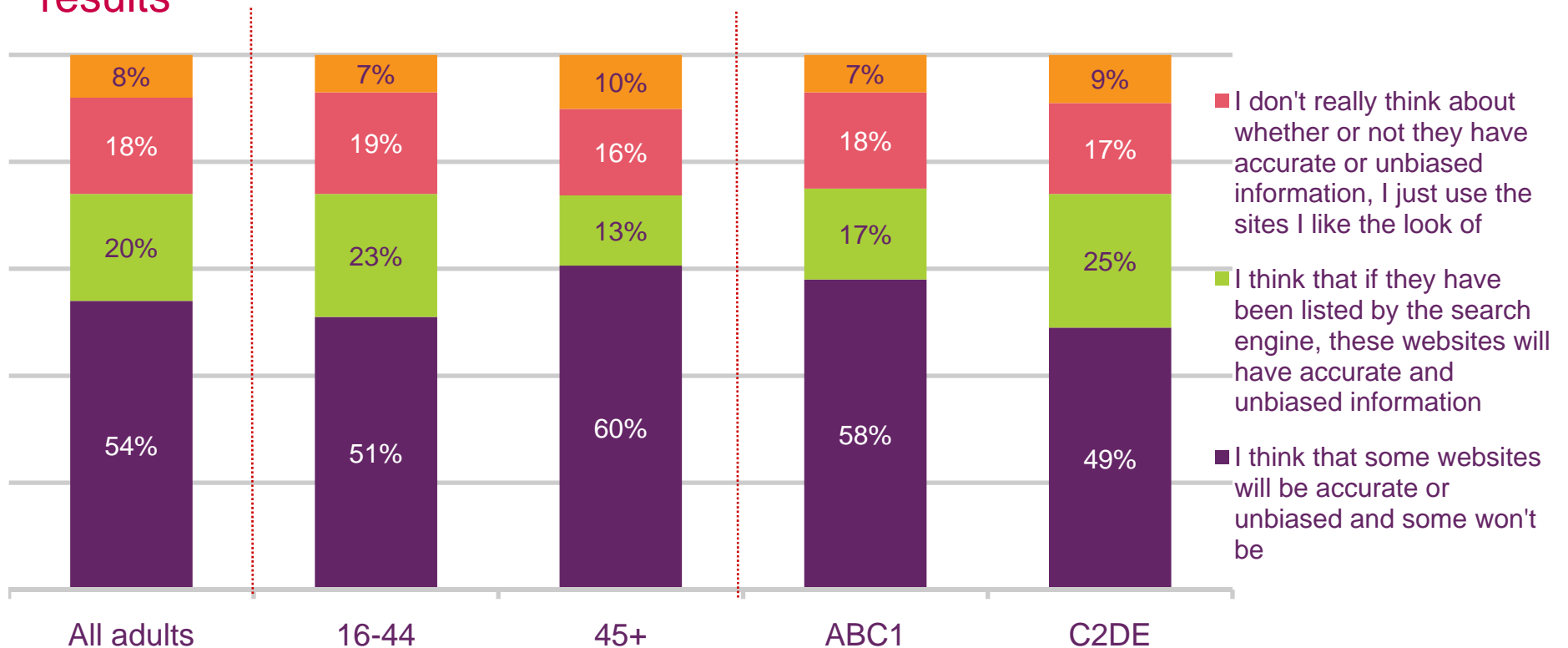
Top 10 Google search terms and top 10 Google destinations

Rank	Search term	Rank	Destination
1	facebook	1	clients1.google.co.uk
2	youtube	2	en.wikipedia.org
3	bbc	3	www.facebook.com
4	hotmail	4	maps.google.co.uk
5	ebay	5	www.youtube.com
6	news	6	www.bbc.co.uk
7	games	7	news.bbc.co.uk
8	google	8	www.amazon.co.uk
9	you	9	www.google.com
10	yahoo	10	answers.yahoo.com

Source: Search terms – Google Insights for search, May 2010; destination urls – UKOM, home and work panel, May 2010.

Figure 4.34

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)

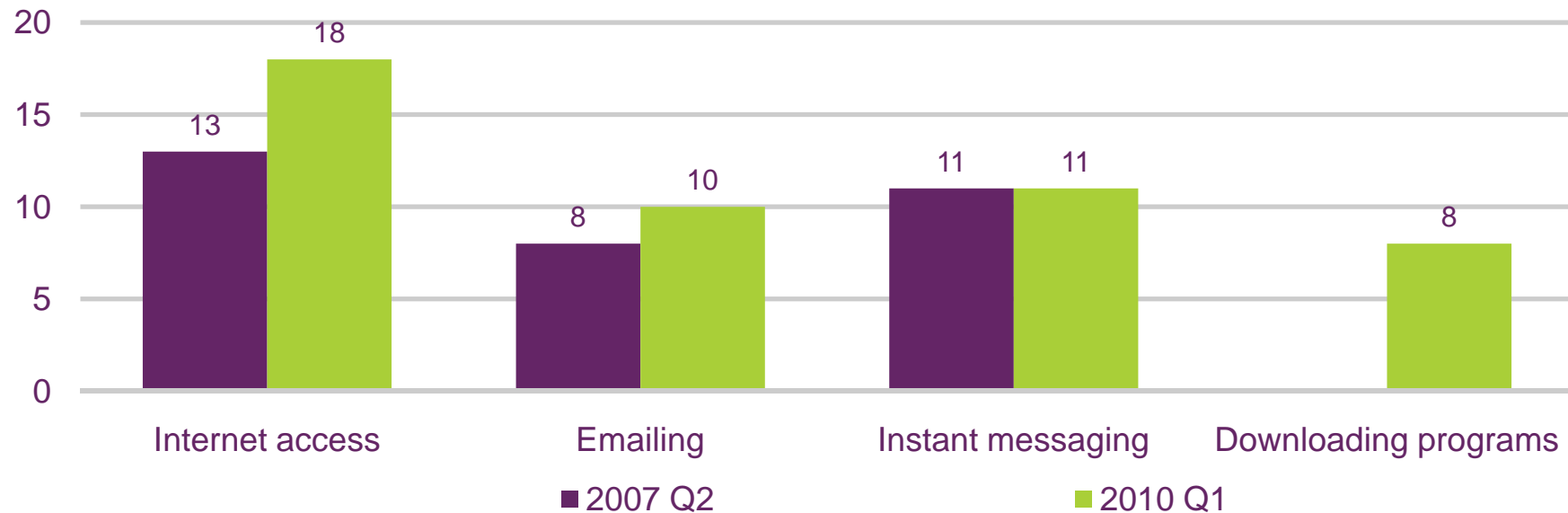
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in September to October 2009

Base: All adults aged 16+ who mostly use search engines to look for information on the internet (407 aged 16+, 252 aged 16-44, 155 aged 45+, 201 male, 206 female, 251 ABC1, 155 C2DE). Significance testing shows any between adults aged under 45 and aged 45 and over, between males and females, between those in ABC1 and C2DE socio-economic groups

Figure 4.35

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?

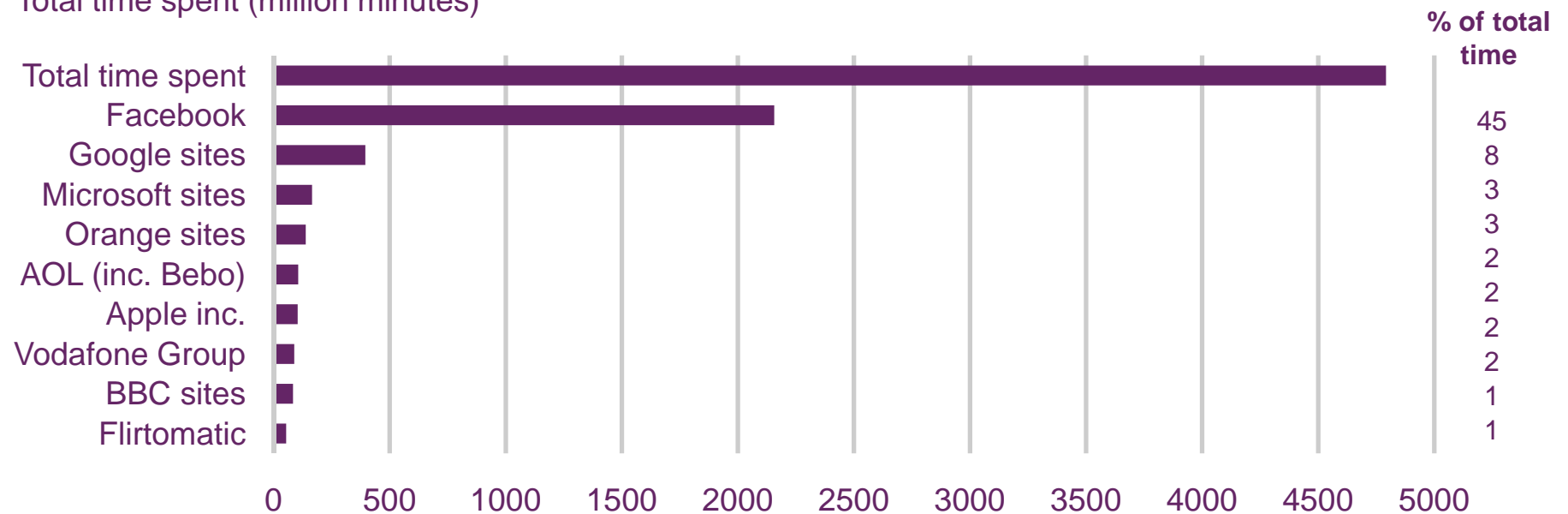
Source: Ofcom technology tracker, Q1 2010.

Base: all mobile users aged 15+ (n=7826).

Figure 4.36

Top 10 UK mobile internet sites, December 2009

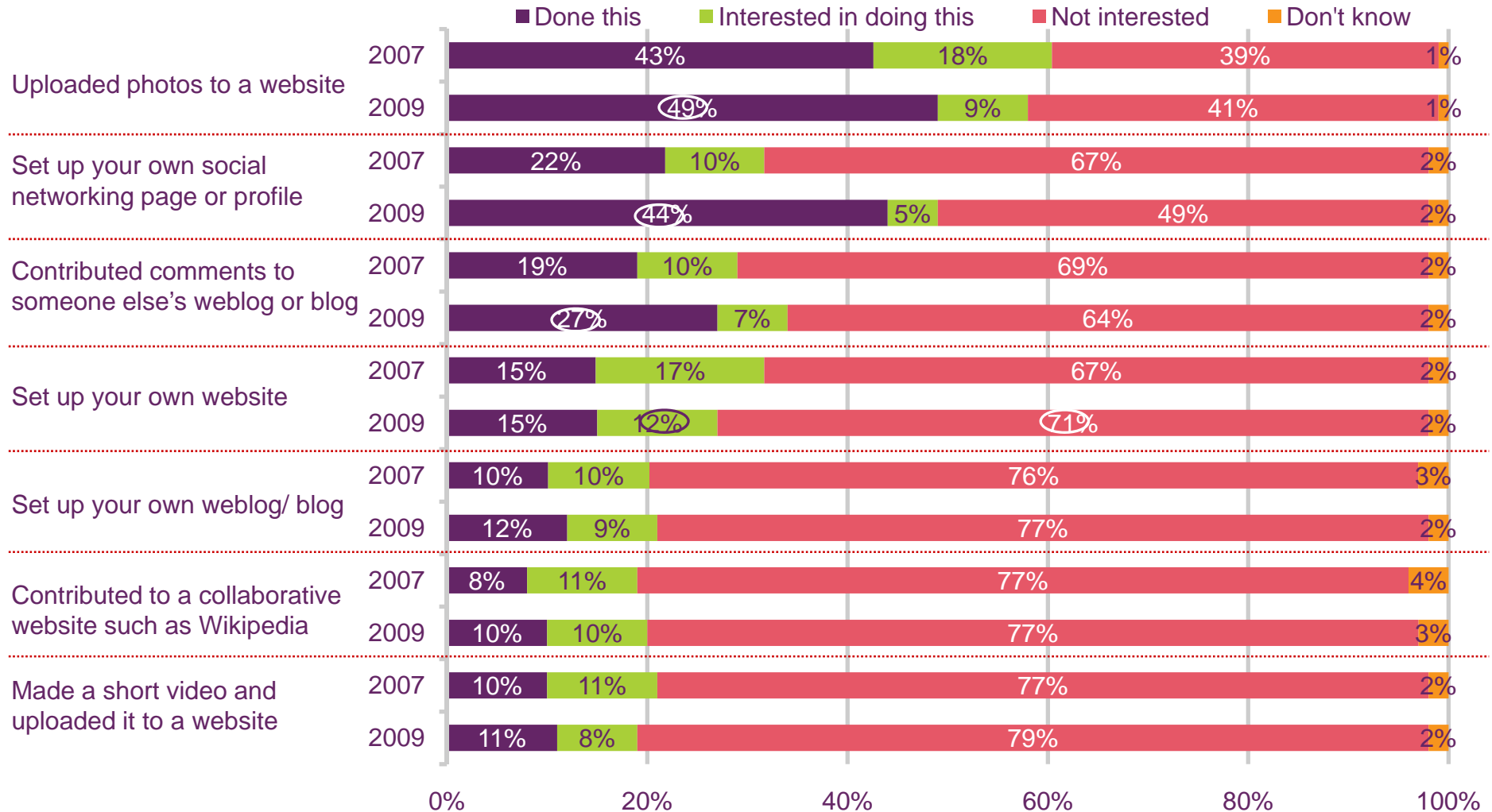
Total time spent (million minutes)



Source: GSMA Mobile Media Metrics

Figure 4.37

Experience of, and interest in, content creation



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)

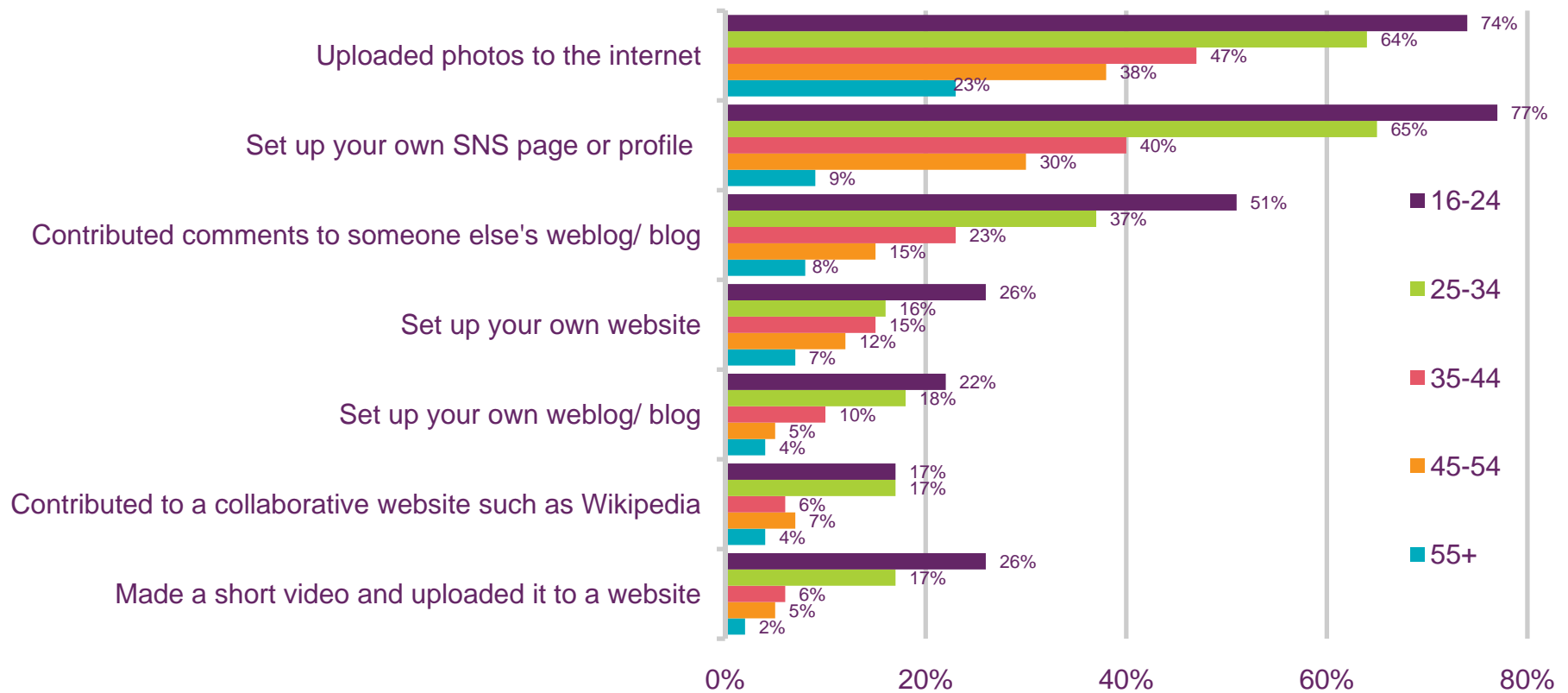
Base: All who use the internet at home or elsewhere (1723 in 2007, 1282 in 2009). Significance testing shows any change between 2007 and 2009

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Figure 4.38



Experience of creative activities, by age



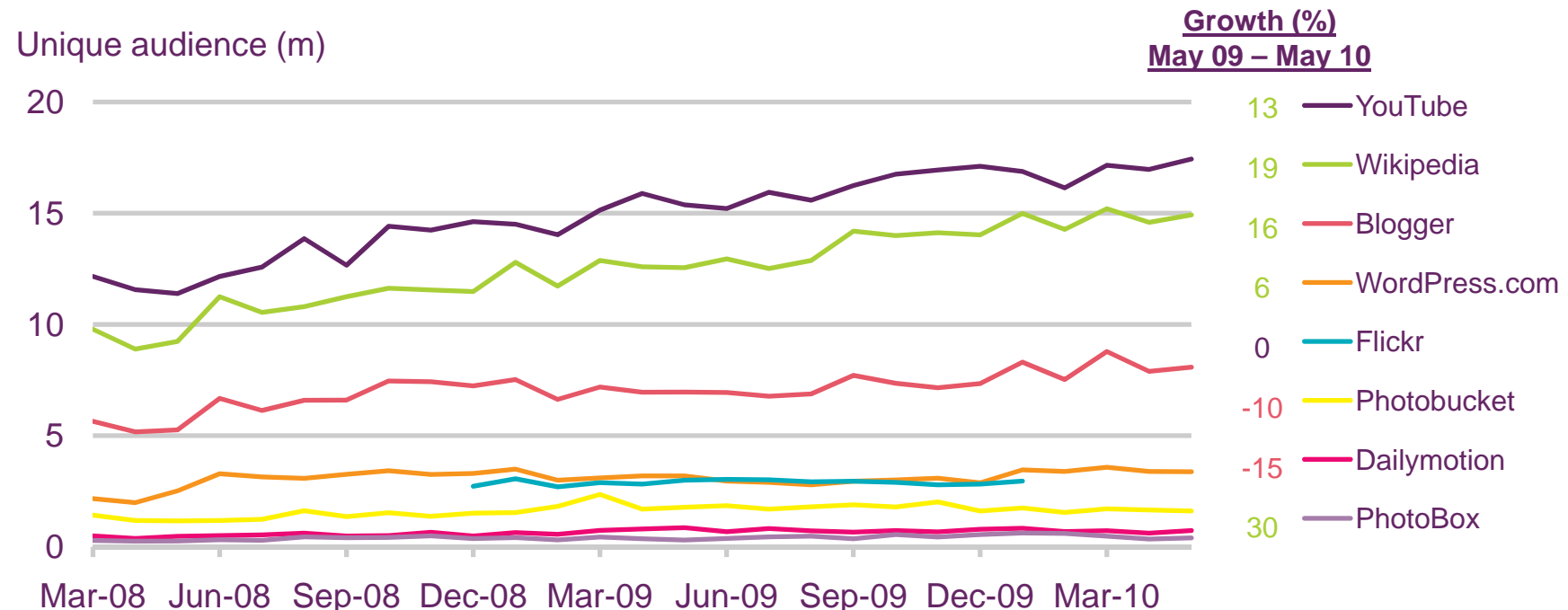
IN23A-I – I'm going to read out a number of things people might do online. Please tell me for each one I read out if you've done it, or you'd be interested in doing it, or not interested.

All who use the internet at home or elsewhere (1278 aged 16+, 238 aged 16-24, 268 aged 25-34, 295 aged 35-44, 209 aged 45-54, 268 aged 55+).

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September-October 2009

Figure 4.39

Unique audience of selected user-generated content sites



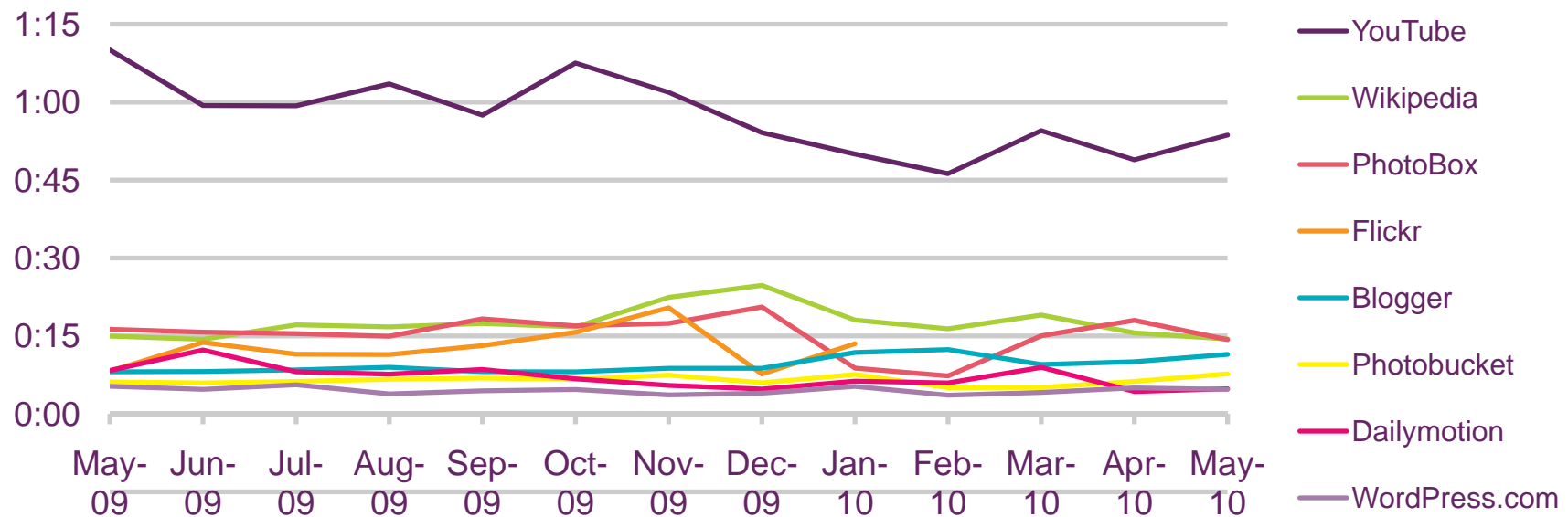
Source: UKOM home and work panel, applications included, month of May 2010.

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

Time spent on selected user-generated content sites

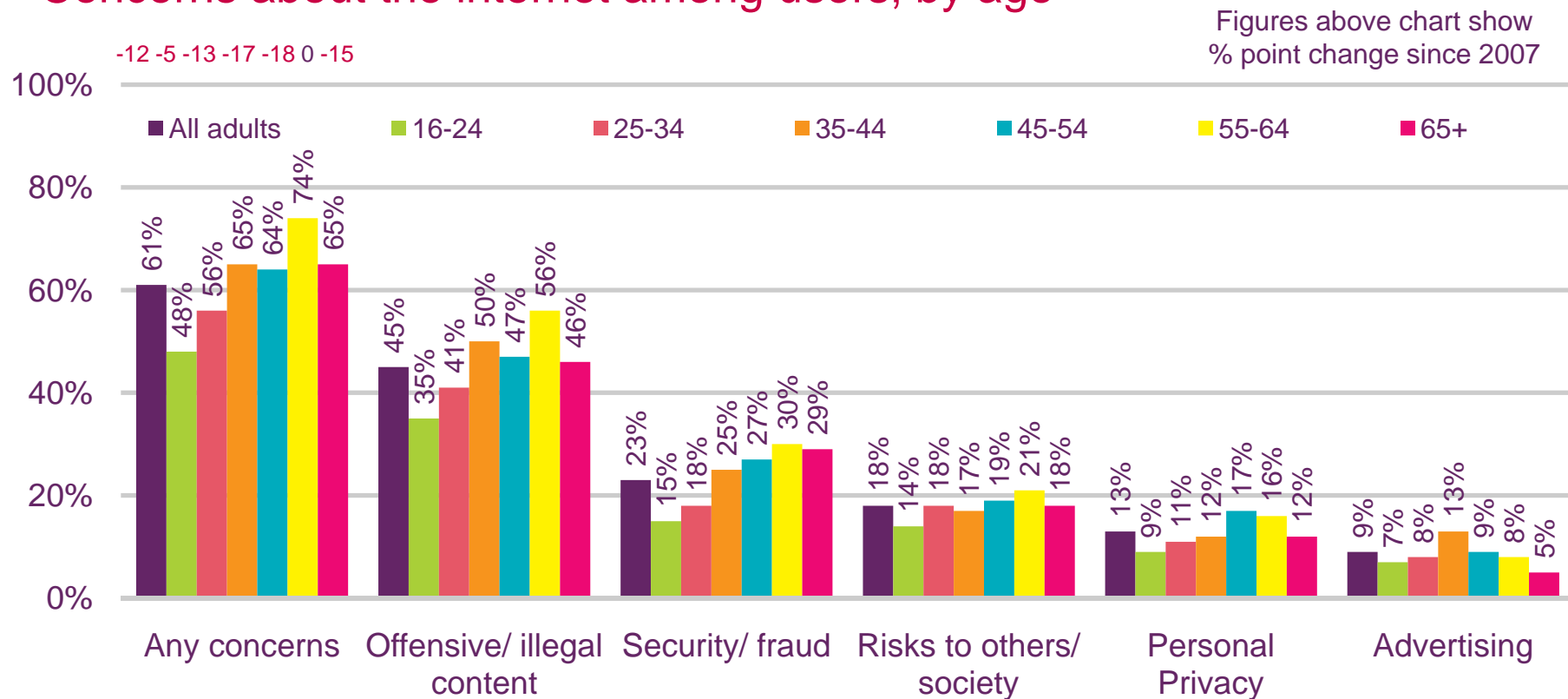
Time spent per person (h:mm)



Source: UKOM, home and work panel, applications included, month of May 2010.

Figure 4.41

Concerns about the internet among users, by age



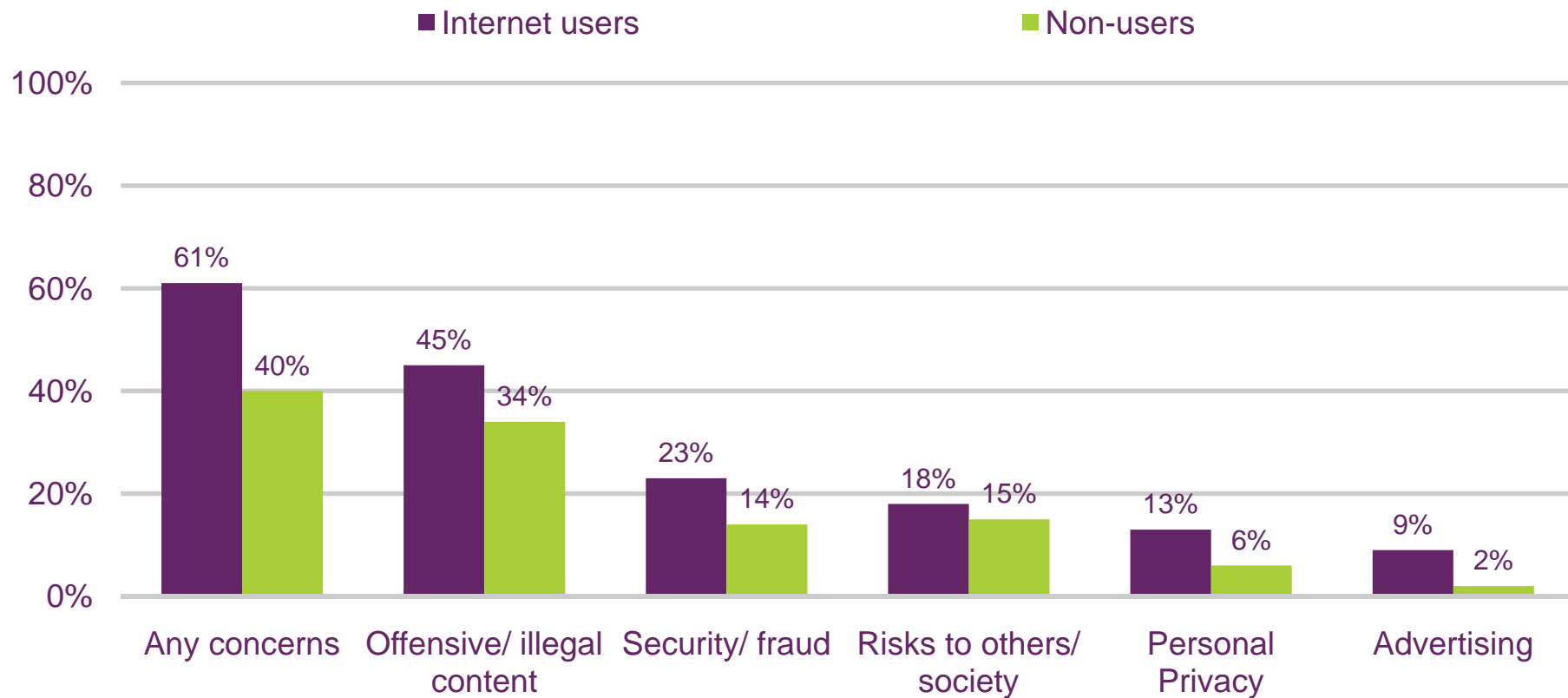
IN30 – Can you tell me if you have any concerns about what is on the internet? (Spontaneous responses, multi-coded)

Base: Adults aged 16+ who use the internet at home or elsewhere (1282 aged 16+, 225 aged 16-24, 235 aged 25-34, 313 aged 35-44, 213 aged 45-54, 168 aged 55-64, 128 aged 65+). Significance testing shows any differences 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 2009

Figure 4.42

Concerns about the internet among users and non-users



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

Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in April to May and September to October 2009

Base: Adults aged 16+ who use the internet at home or elsewhere (1282)/ who do not use the internet at home or elsewhere (542). Significance testing shows any differences between internet users and non-users