

# 5. Internet and web-based content

# 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)*	41.3	44.1	48.3	29.6	199.3	n/a	59.9	13.8	21.8	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Fixed broadband connections per 100 HH†	77	81	70	54	76	86	67	66	65	93	63	71	42	28	44	6	39
Cellular broadband connections per 100 population‡	8	5	7	10	n/a	4	8	25	7	6	21	13	9	n/a	n/a	n/a	n/a
Internet access via a mobile phone(%)‡	38	30	31	37	33	n/a	43	32	46	n/a	n/a	n/a	n/a	n/a	n/a	n/a	70

Source: IDATE / Industry data / Ofcom, Nielsen

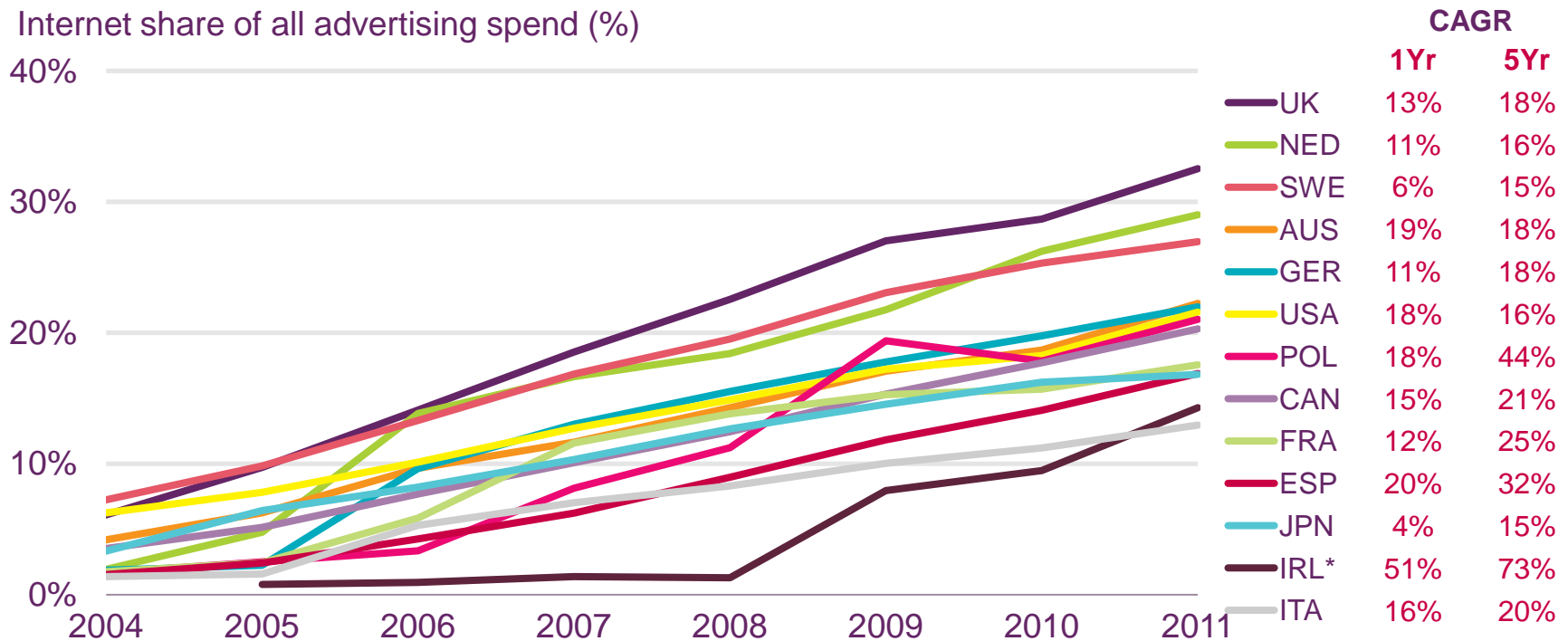
\*Nielsen, month of August 2012, home and work panel, applications included.

† IDATE / Industry data / Ofcom, 2011.

‡ Ofcom international research, October 2012.

## Figure 5.2

### Internet share of total advertising expenditure



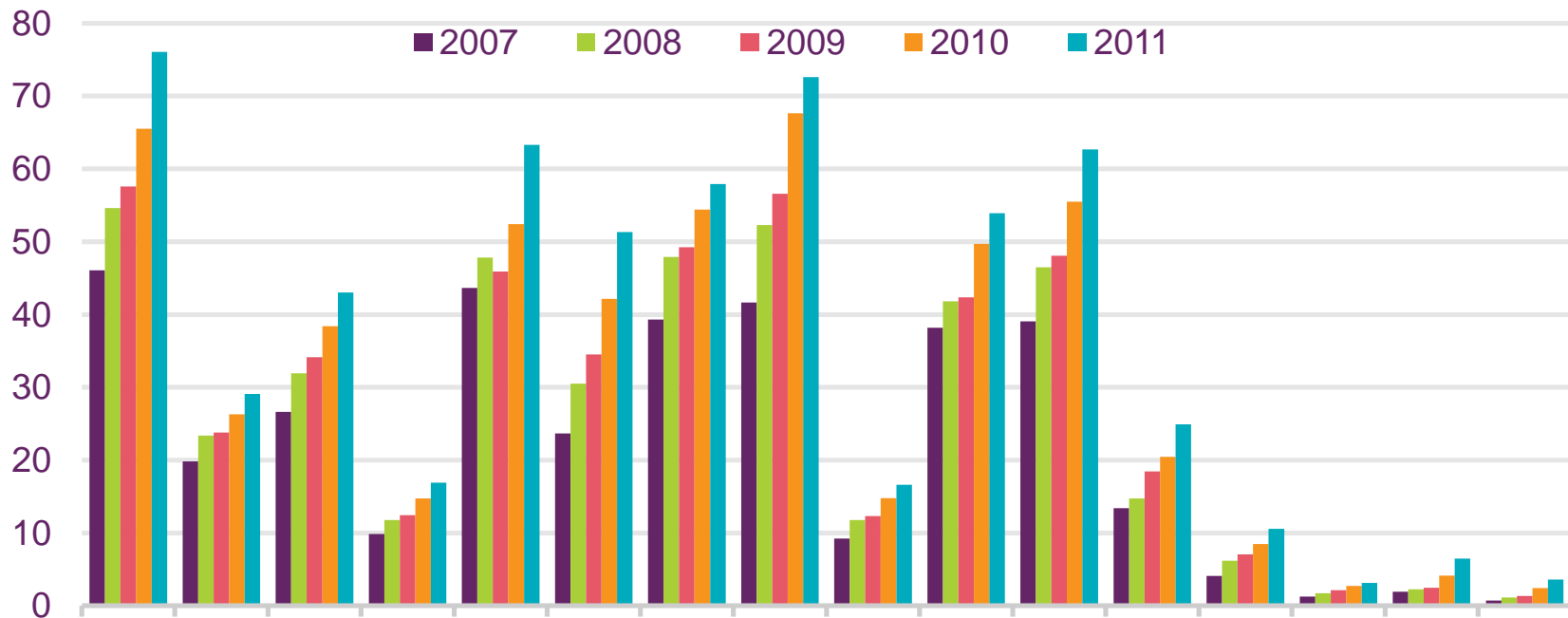
Source: Warc data ([www.warc.com](http://www.warc.com))

Note: Data do not include mobile advertising, a small but growing new market. This is particularly relevant to Japan where in 2011 mobile advertising accounted for approximately 3.5% of total advertising expenditure. \* Data prior to 2009 exclude paid-for search advertising. Internet data from 2009 include display, classified, search and email and are not comparable with those of previous years. Notes on adspend by country available at <http://www.warc.com/Pages/ForecastsAndData/NotesandSources.info>

## Figure 5.3

### Total wired internet advertising expenditure, per head 2007-12

Internet advertising spend per head (GBP)



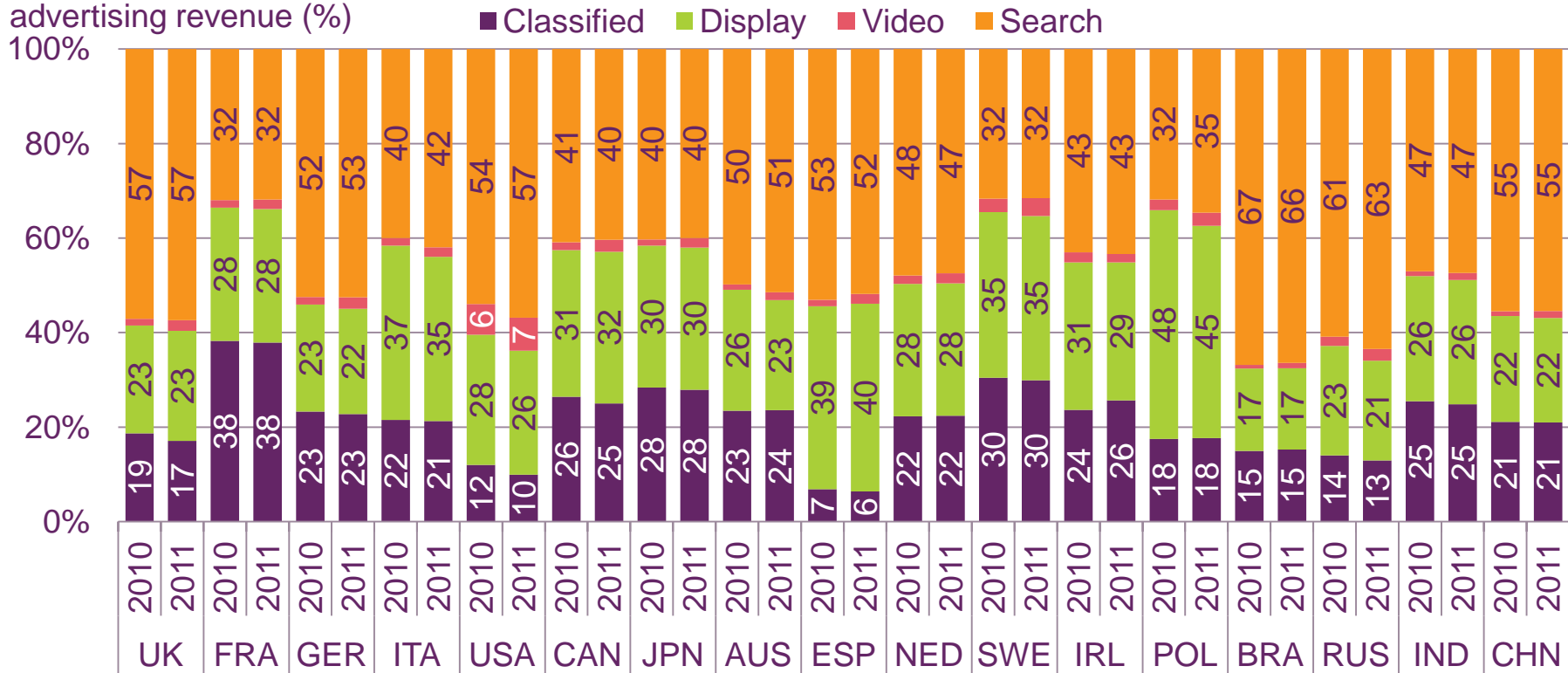
YoY Growth 16% 11% 12% 15% 21% 22% 6% 7% 12% 8% 13% 22% 25% 15% 56% 48%  
10/11

Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2012-2016 [www.pwc.com/outlook](http://www.pwc.com/outlook), US Census Bureau (EoY estimates from mid-year values)

# Figure 5.4

## Wired internet advertising expenditure, by category

Proportion of internet advertising revenue (%)

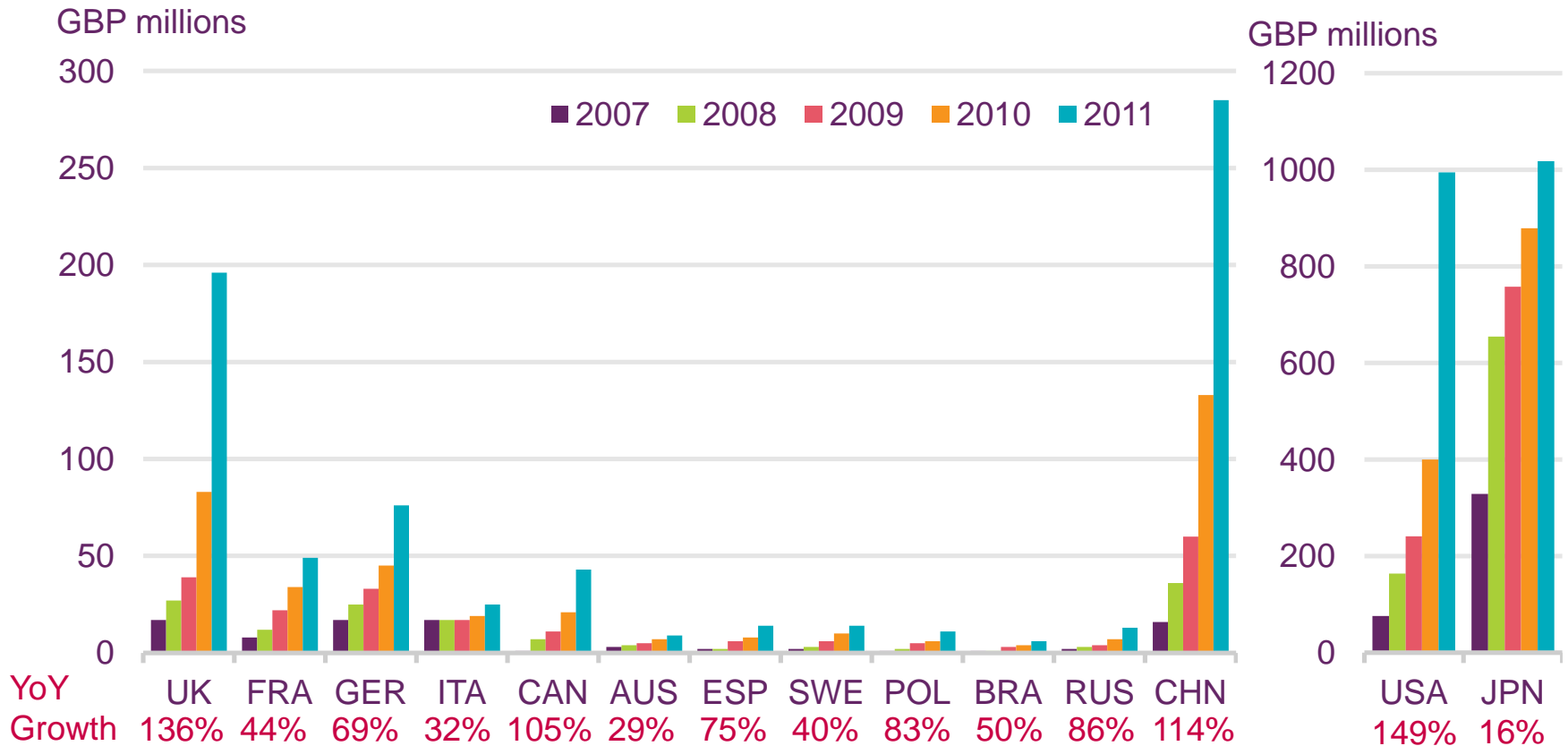


Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2012-2016

[www.pwc.com/outlook](http://www.pwc.com/outlook)

# Figure 5.5

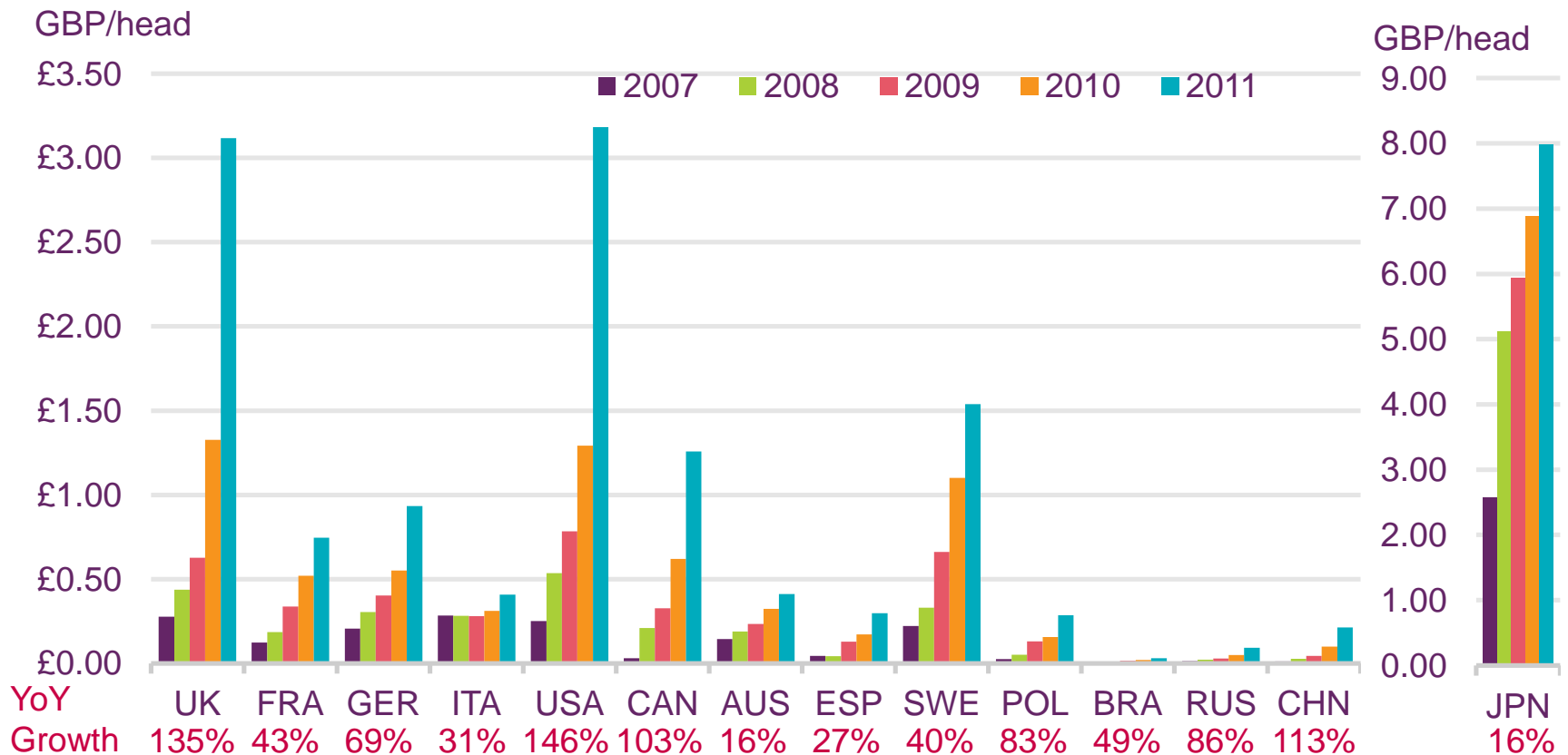
## Mobile internet advertising expenditure 2007-12



Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2012-2016  
[www.pwc.com/outlook](http://www.pwc.com/outlook)

# Figure 5.6

## Mobile internet advertising expenditure per head 2007-12



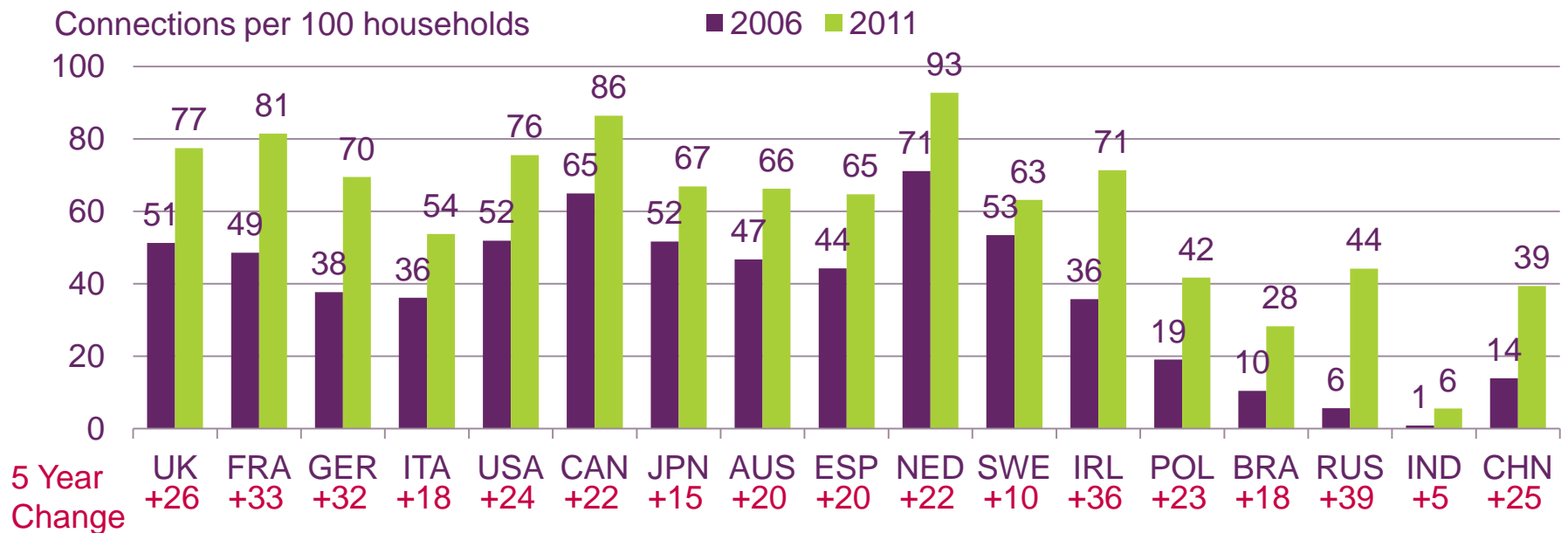
Source: PricewaterhouseCoopers Global Entertainment and Media Outlook: 2012-2016 [www.pwc.com/outlook](http://www.pwc.com/outlook), and US Census Bureau (EoY estimates from mid-year values)



## 5.2 Internet and devices

# Figure 5.7

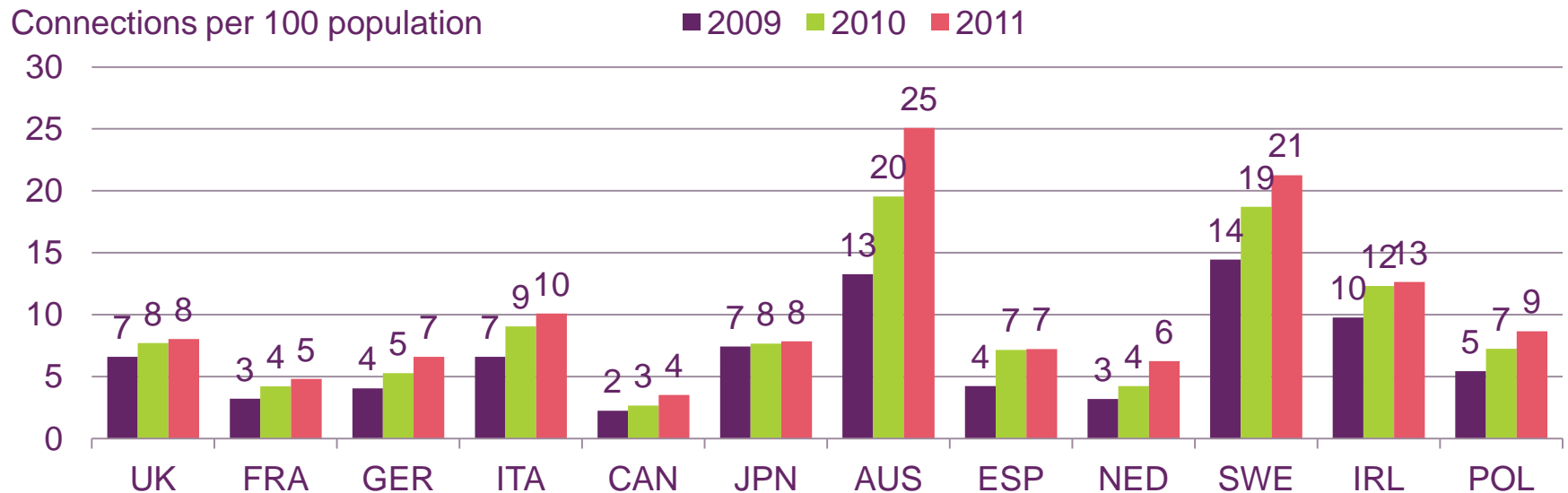
## Fixed broadband connections per 100 households



Source: IDATE / industry data / Ofcom

## Figure 5.8

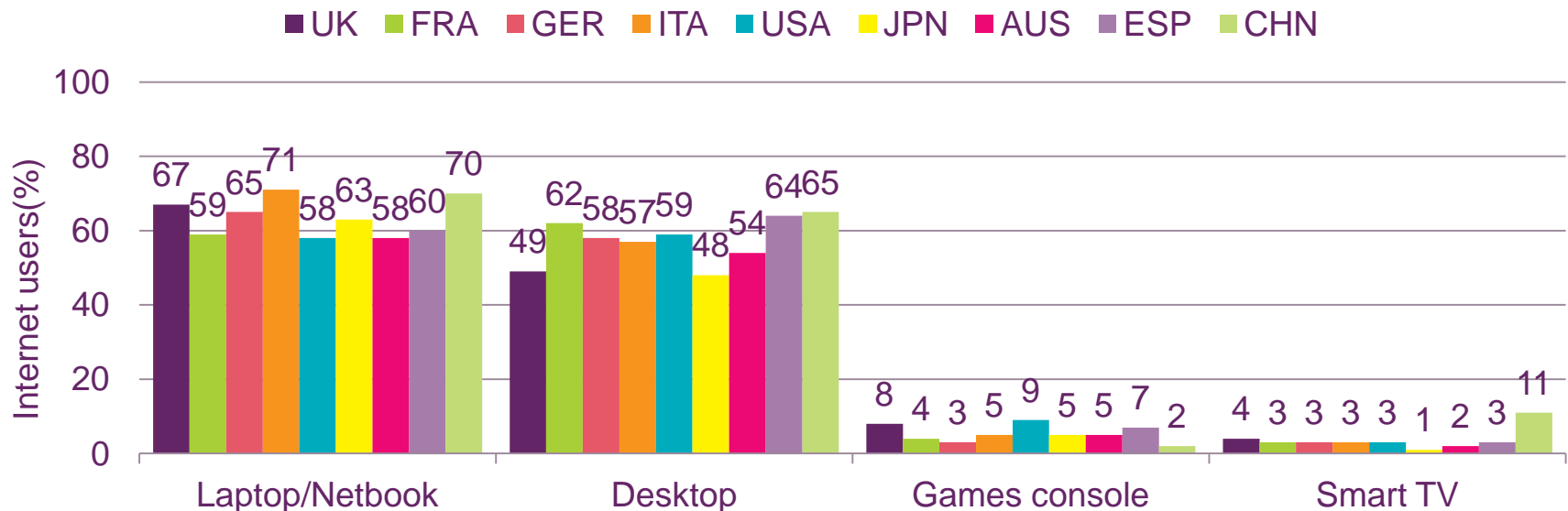
### Mobile broadband connections per 100 population



Source: IDATE / industry data / Ofcom

## Figure 5.9

### Household devices used to access the internet



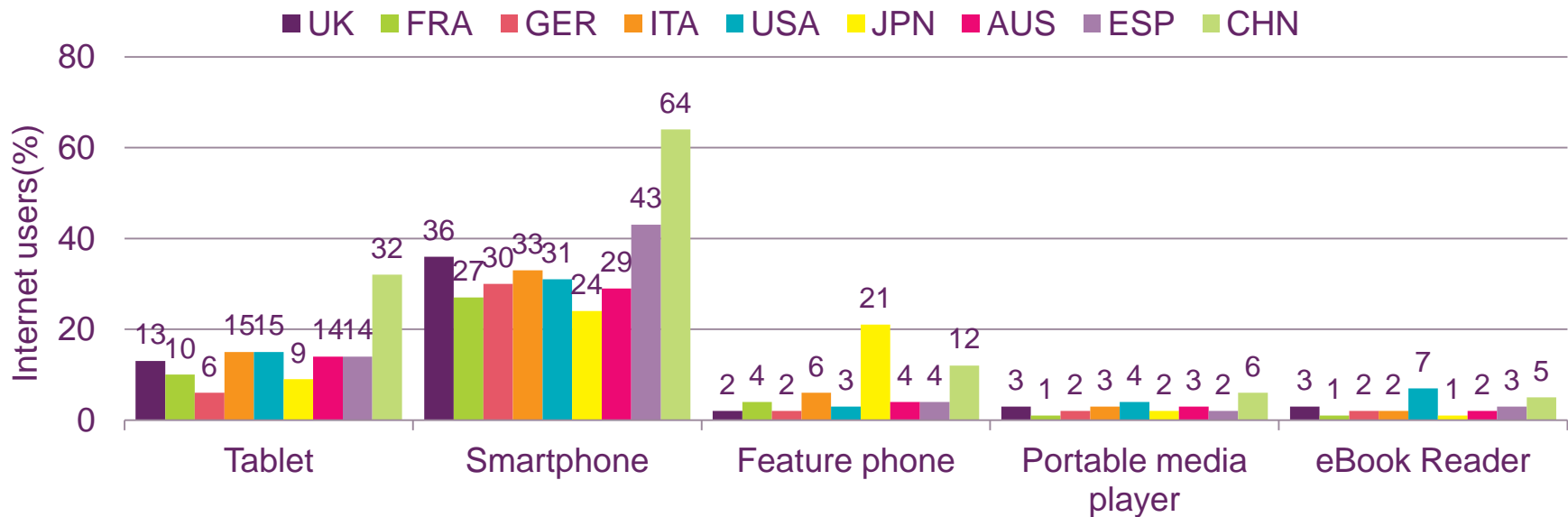
Source: Ofcom consumer research, September 2012

Base: All adults 18+, who own and use any devices capable of connecting to the internet (UK=1060, FRA=1006, GER=1013, ITA=1006, USA=996, JPN=989, AUS=998, ESP=994, CHN=1007)

Q.7 Which of the following devices do you use to access the internet generally (e.g. visiting web sites, emailing, online gaming, downloading files)?

# Figure 5.10

## Handheld devices used to access the internet



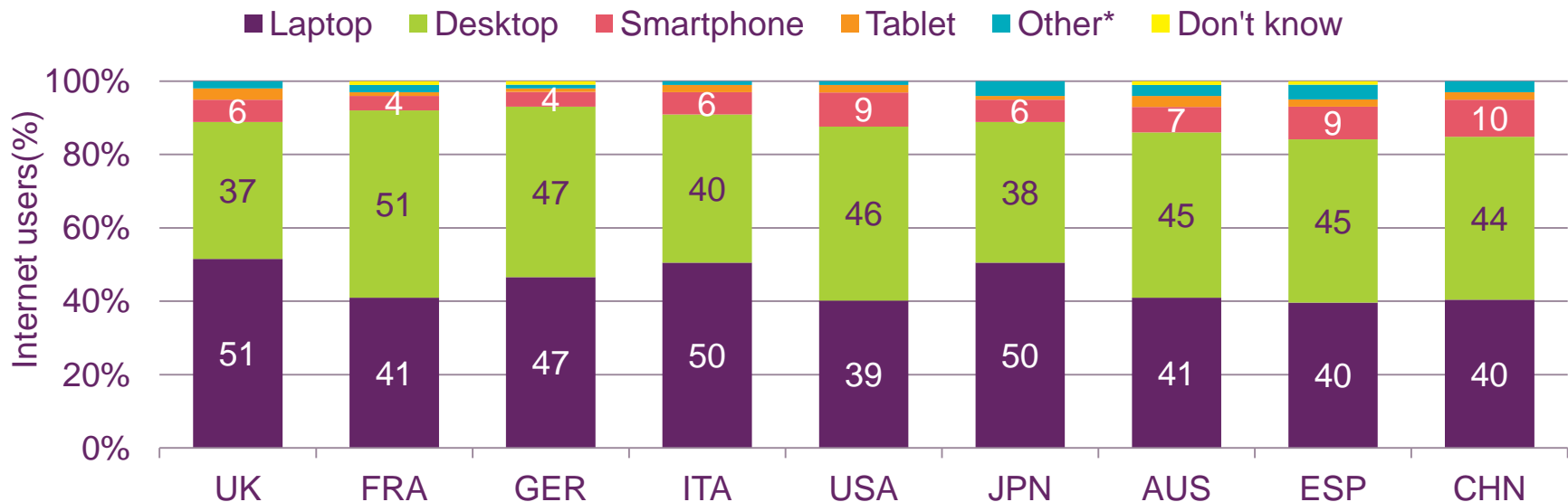
Source: Ofcom consumer research, September 2012

Base: All adults 18+, who own and use any devices capable of connecting to the internet (UK=1060, FRA=1006, GER=1013, ITA=1006, USA=996, JPN=989, AUS=998, ESP=994, CHN=1007)

Q.7 Which of the following devices do you use to access the internet generally (e.g. visiting web sites, emailing, online gaming, downloading files)?

# Figure 5.11

## Device used most frequently to access the internet



Source: Ofcom consumer research, September 2012

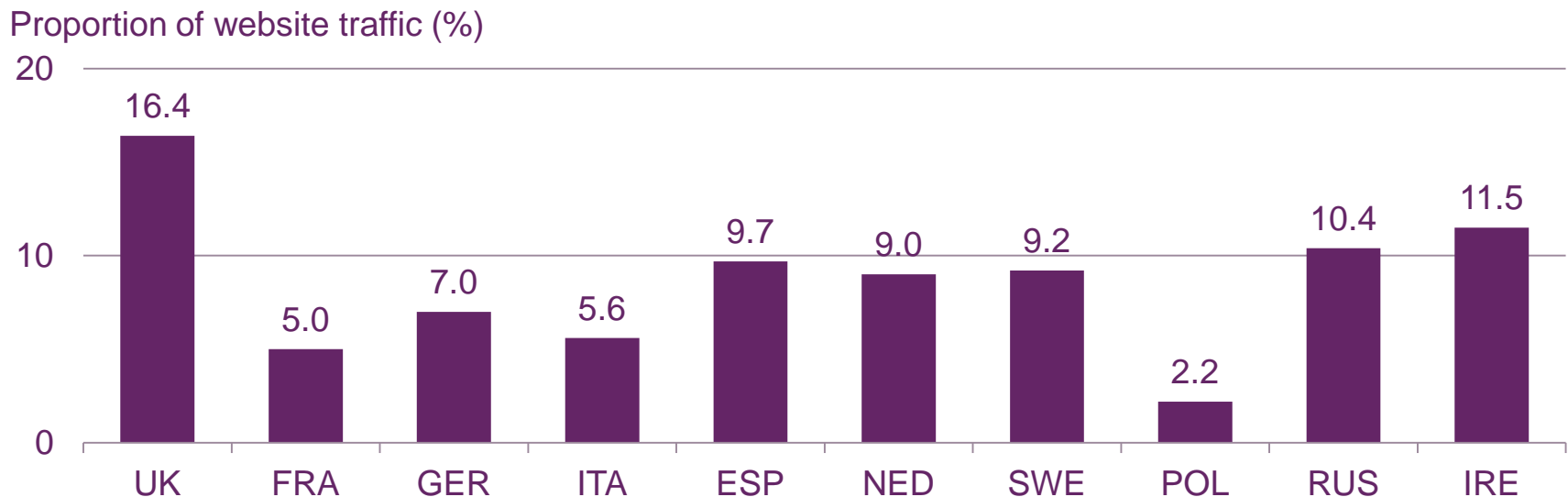
Base: All adults 18+, who own and use any devices capable of connecting to the internet (UK=1060, FRA=1006, GER=1013, ITA=1006, USA=996, JPN=989, AUS=998, ESP=994, CHN=1007)

Note: Not all data labels sum to 100 due to rounding. \*Other – includes mobile phone, games console, portable media player, eBook reader, smart TV and other.

Q.C1 Which of the devices you own do you use most to connect to the internet?

## Figure 5.12

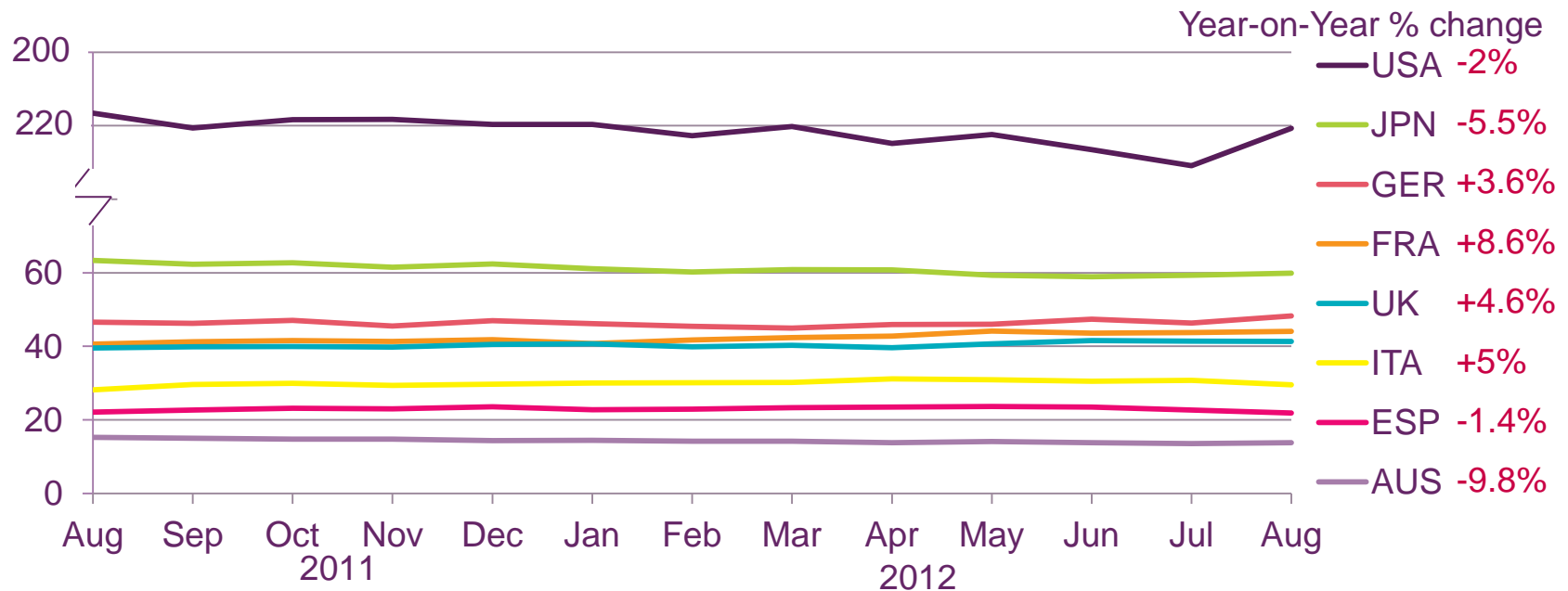
Proportion of website traffic using mobile, tablet, and other connected devices



Source: comScore Device Essentials, June 2012

## Figure 5.13

Active internet users on laptop and desktop computers, August 2011 to 2012



Source: Nielsen, August 2011 and August 2012 (internet applications included, home & work)



## Figure 5.14

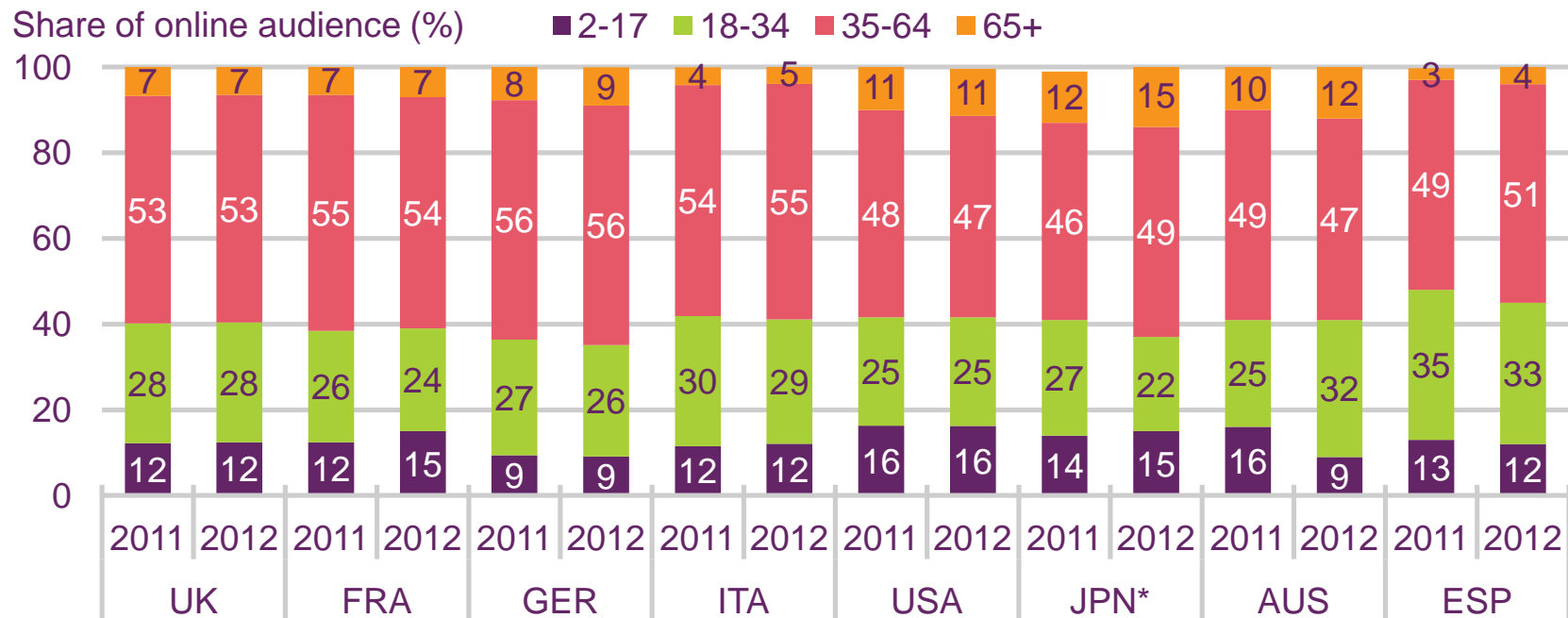
Unique online audience on a laptop or desktop computer, by gender:  
August 2011 and August 2012



Source: Nielsen, August 2011 and August 2012, home and work panel, applications included.

## Figure 5.15

Unique online audience on a laptop or desktop computer, by age: August 2011 and August 2012

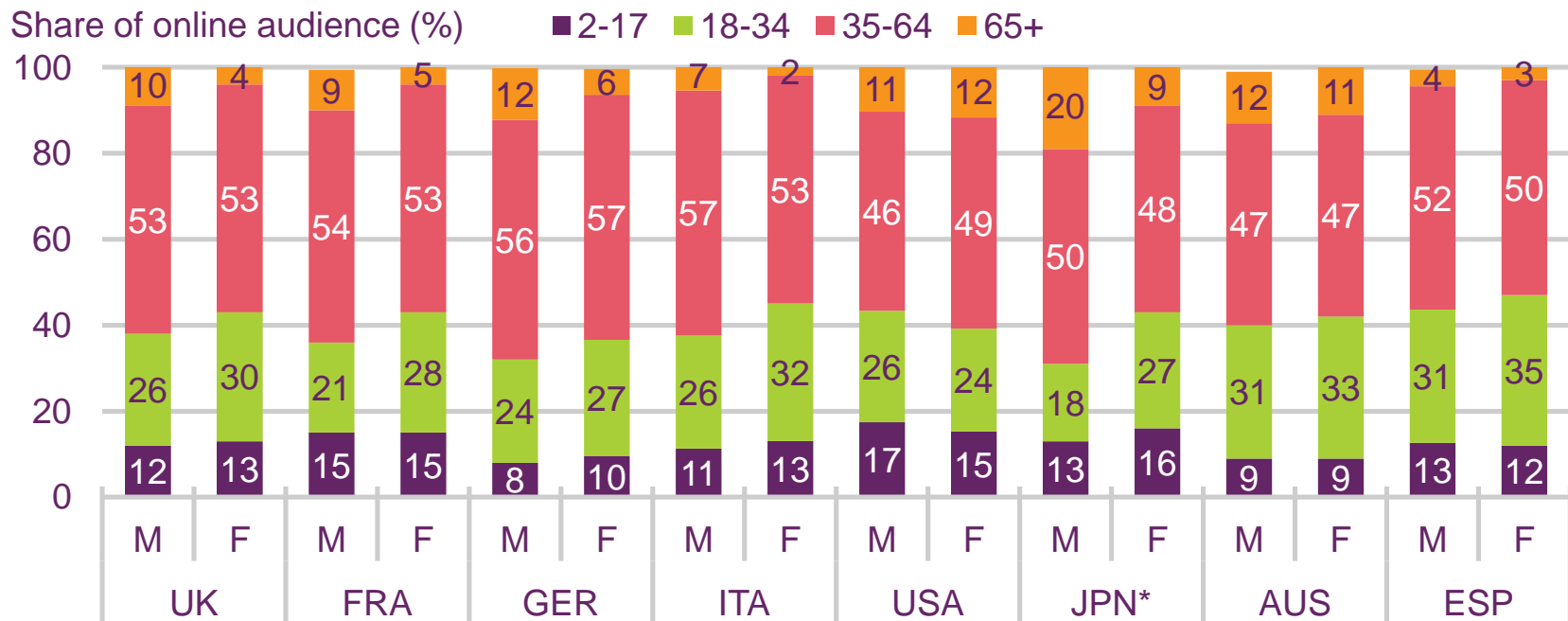


Source: Nielsen, August 2011 and August 2012, home and work panel, applications included.

\* Japan data differs, ages breaks are 2-19, 20-34, 35-59 and 60+ respectively.

# Figure 5.16

Unique online audience on a laptop or desktop computer, by age and gender: August 2011 and August 2012

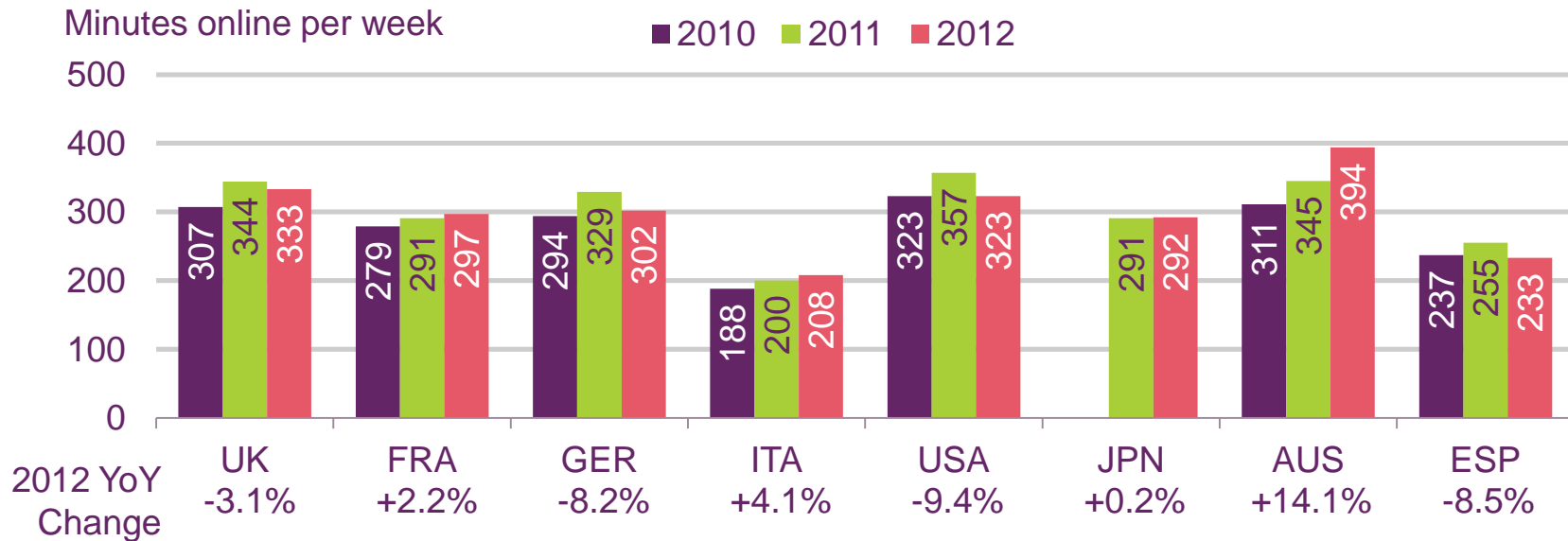


Source: Nielsen, August 2012, home and work panel, applications included.

\* Japan data differs, ages breaks are 2-19, 20-34, 35-59 and 60+ respectively

## Figure 5.17

Average number of minutes spent online on a laptop or desktop computer per week

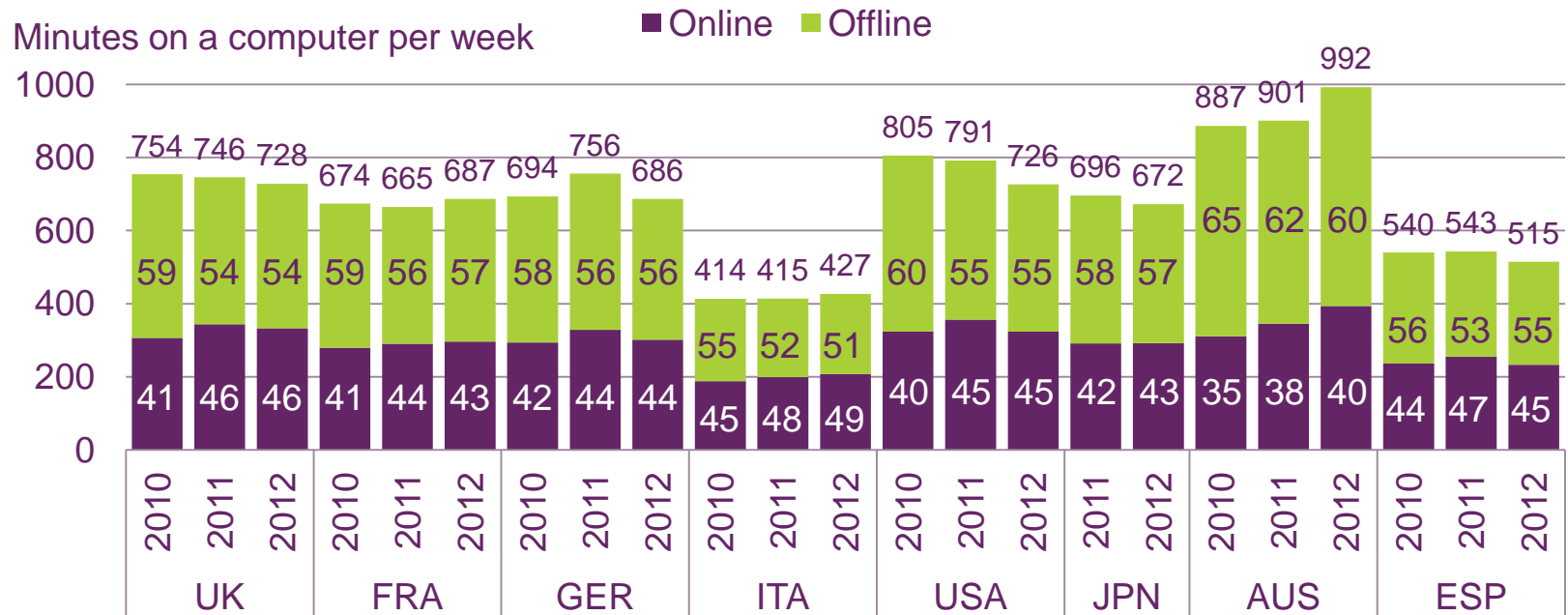


Source: Nielsen, August 2012, home and work panels, applications included.

Note: 2010 data unavailable for Japan.

# Figure 5.18

Time spent online and offline each week on a laptop or desktop computer



Source: Nielsen, August 2012, home and work panels, applications included.

Note: Data series labels show proportions of total minutes for each year. Data from 2010 from Japan is unavailable.

## 5.2 Web-based content

## Figure 5.19

### Top ten website brands, by country

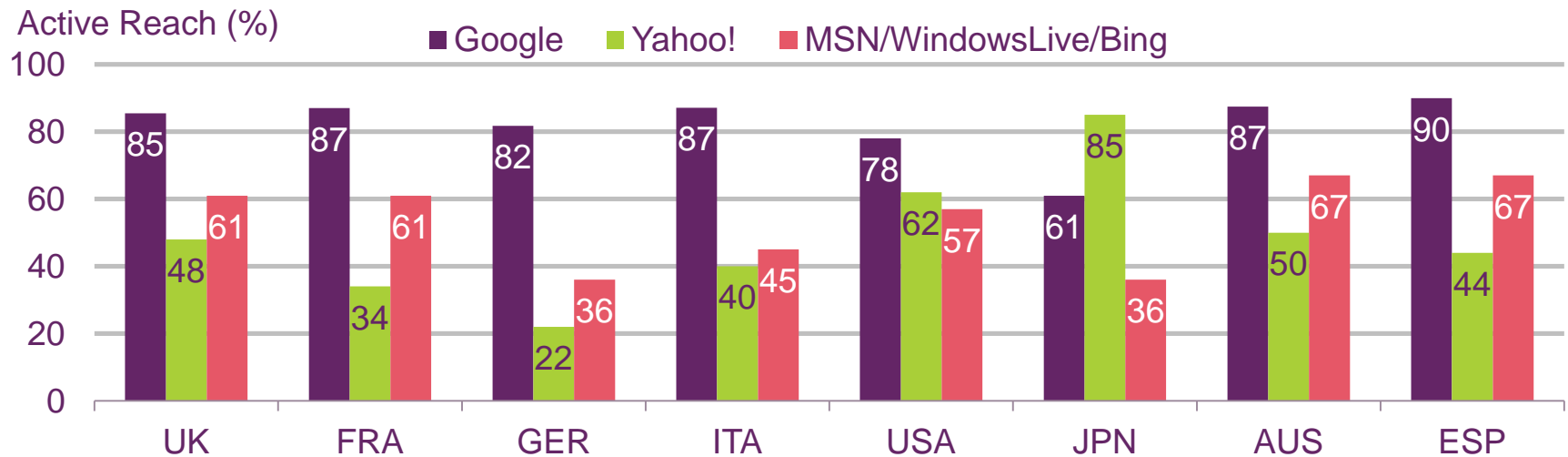
	UK	FRA	GER	ITA	USA	JPN	AUS	ESP
1	Google -	Google -	Google -	Google -	Google -	Yahoo! -	Google	Google -
2	Facebook -	Facebook -	Facebook -	Facebook -	Facebook -	Google -	Facebook	Facebook +1
3	MSN/WindowsLive/Bing -	MSN/WindowsLive/Bing -	YouTube -	YouTube -	Yahoo! -	FC2 -	MSN/WindowsLive/Bing	MSN/WindowsLive/Bing -1
4	YouTube +2	YouTube +1	Microsoft -	MSN/WindowsLive/Bing -	MSN/WindowsLive/Bing -	YouTube -	YouTube	YouTube -
5	BBC -1	Microsoft -1	Amazon +1	Virgilio -	YouTube -	Rakuten -	Microsoft	Microsoft -
6	Yahoo! -1	Orange -	eBay -1	Microsoft +2	Microsoft -	Wikipedia -	Yahoo!	Blogger +1
7	Amazon -	Wikipedia -	Wikipedia +1	Yahoo! -1	AOL Media Network -	Ameba +2	Wikipedia	Yahoo! -1
8	eBay -	Leboncoin.fr N	MSN/WindowsLive/Bing -1	Libero -1	Amazon N	Microsoft -	eBay	Wikipedia -
9	Microsoft -	Yahoo! -1	T-Online -	Wikipedia -	Ask Search Network +1	Livedoor +1	Apple	Elmundo.es +1
10	Wikipedia -	Free -1	gutefrage.net N	Blogger -	Wikipedia -2	Goo -3	Blogger	Wordpress N

Source: Nielsen, August 2012.

Note: Coloured font indicate brand appears more than once. Includes all internet applications. '+' or '-' and a number denotes change in rank since 2011 ICMR publication, '-' only denotes no change, and 'N' denotes a new entrant to the top 10. Australia rankings available for 2012 only.

## Figure 5.20

### Active reach of search engine brands, by country



Source: Nielsen, Search Brands per Country, August 2012, home and work panel, including applications.



## Figure 5.21

Most searched-for terms on Google between August 2011 and August 2012

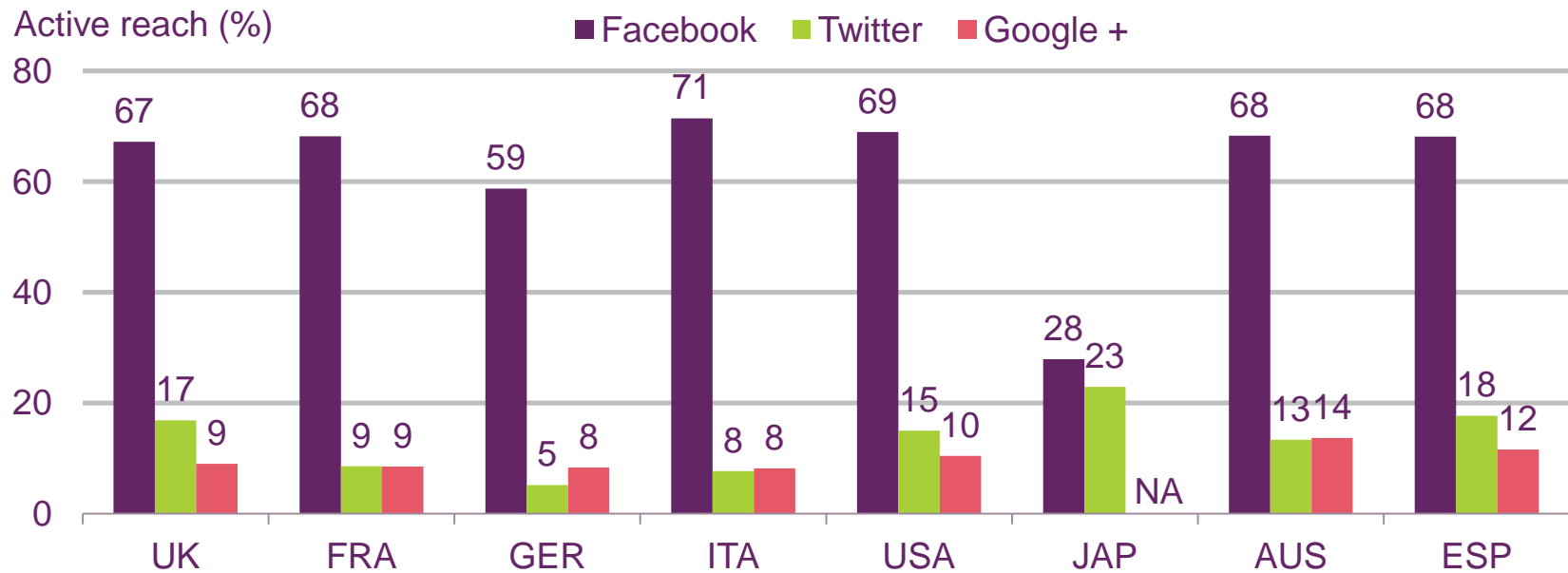
Country	1 <sup>ST</sup>	2 <sup>ND</sup>	3 <sup>RD</sup>	Largest increase
UK	facebook	bbc	youtube	tubidy
FRA	facebook	youtube	bon coin	bref
GER	facebook	youtube	berlin	kinox.to
ITA	facebook	youtube	mail	belen
USA	facebook	you	google	pinterest
CAN	facebook	youtube	google	tumblr
JPN	動画 <sup>1</sup>	yahoo	画像 <sup>2</sup>	フェイスブック <sup>3</sup>
AUS	facebook	youtube	google	one direction
ESP	facebook	hotmail	tuenti	bankia
NED	facebook	youtube	marktplaats	www.hotmail.com
SWE	facebook	youtube	stockholm	minecraft
IRL	facebook	ireland	youtube	fb
POL	facebook	nk	gry	tablica.pl
BRA	facebook	jogos	orkut	bbb12
RUS	одноклассники <sup>4</sup>	одноклассники <sup>5</sup>	контакте <sup>6</sup>	авито <sup>7</sup>
IND	facebook	download	video	sunny leone
CHN	的 <sup>8</sup>	qq	游戏 <sup>9</sup>	2012

Source: Google Insights Search Tool, August 2011 to August 2012.

Notes: 1. animation 2. image 3. facebook 4. download 5. classmates (odnoklassniki.ru) 6. vkontakte 7. avito 8. Of 9. Game

## Figure 5.22

### Active reach of Facebook, Twitter and Google+ on laptop and desktop computers

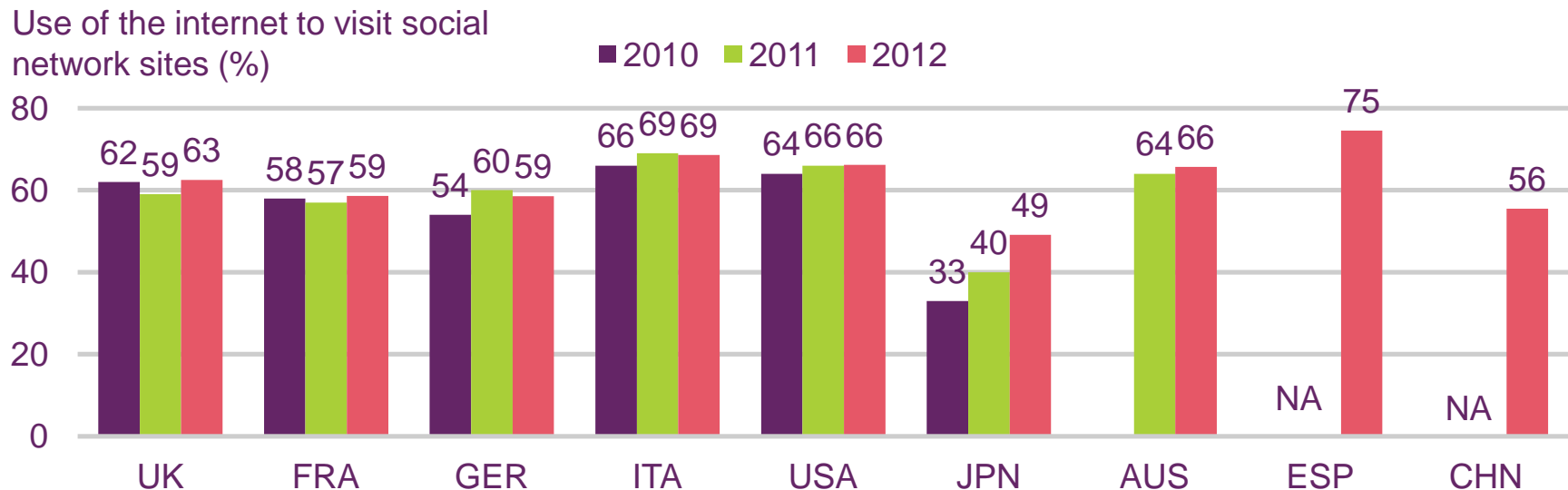


Source: Nielsen, August 2012, home and work panel, including applications

Note: Data unavailable for Google+ in Japan.

## Figure 5.23

### Use of home internet connection to visit social networking sites



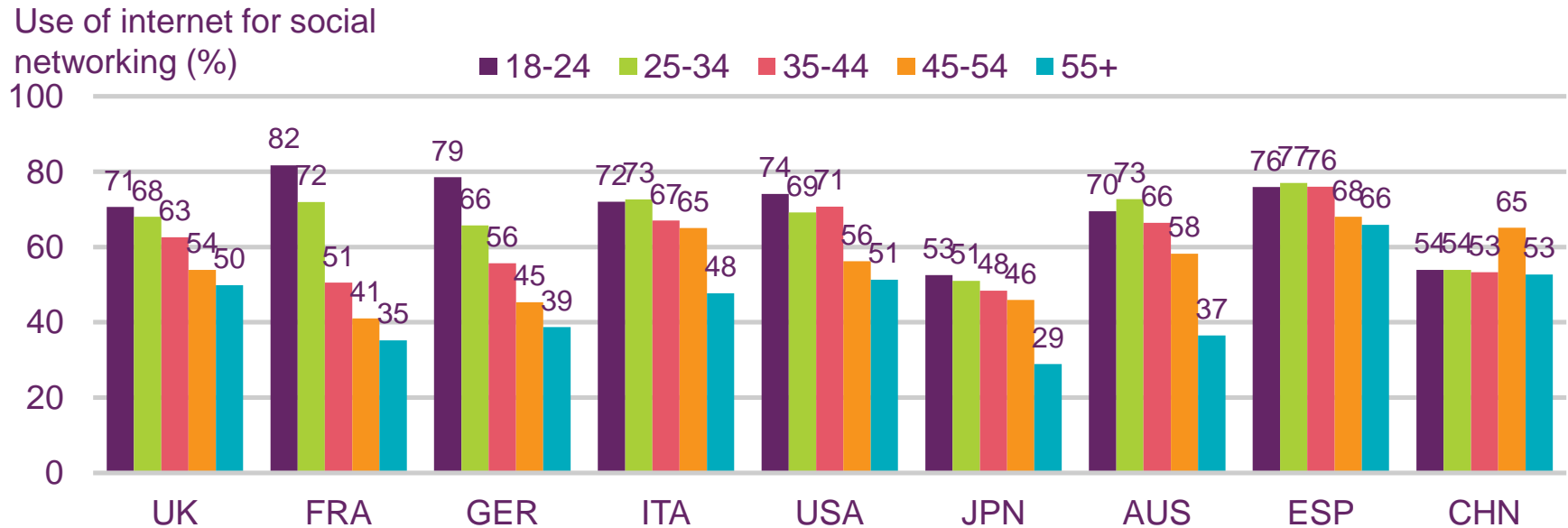
Source: Ofcom consumer research October 2012.

Base: All respondents, ages 18-64 (UK=945, FRA=778, GER=839, ITA=890, USA=788, JPN=792, AUS=793, ESP=911, CHN=965)

Q8: Which, if any, of the following activities do you use your home internet connection for?

# Figure 5.24

## Use of home internet connection to visit social networking sites, by age



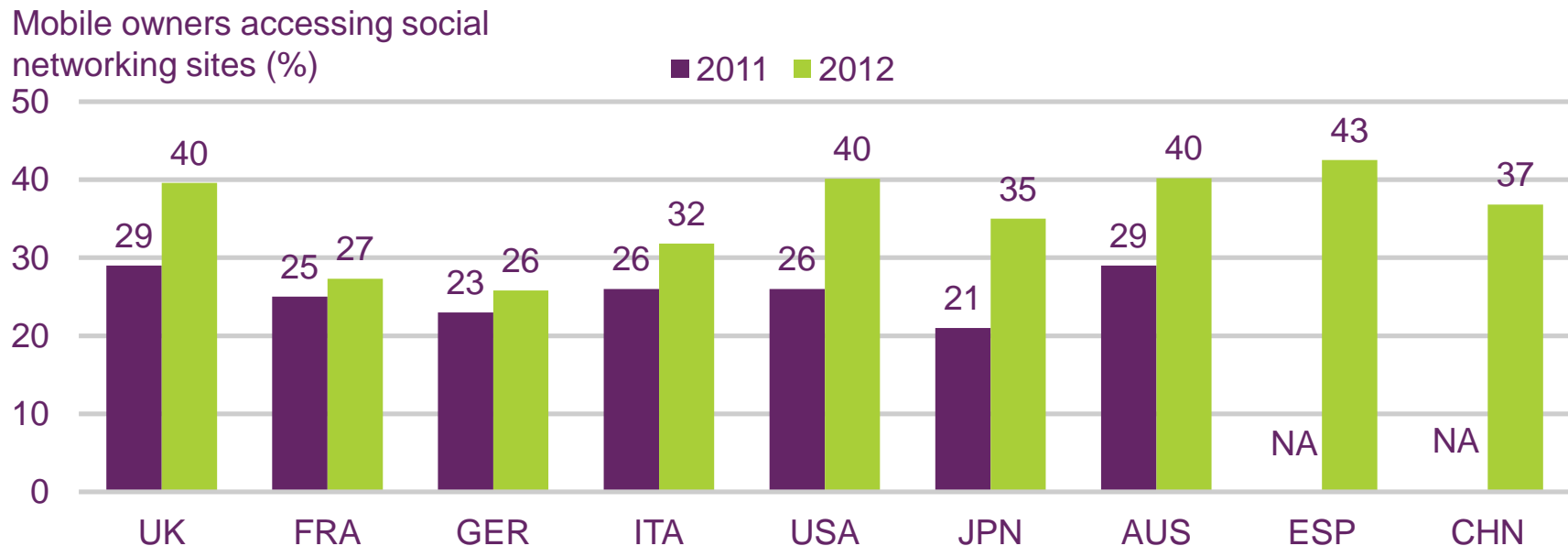
Source: Ofcom consumer research October 2012.

Base: All respondents ages 18+ (UK=1065, FRA=1016, GER=1024, ITA=1015, USA=1010, JPN=1004, AUS=1007, ESP=1001, CHN=1010)

Q8: Which, if any, of the following activities do you use your home internet connection for?

## Figure 5.25

### Use of mobile phones to visit social networking sites



Source: Ofcom consumer research October 2012

Base: All respondents aged 18-64 who own a smartphone and/or a mobile phone (UK=837, FRA=733, GER=790, ITA=869, USA=684, JPN=531, AUS=759, ESP=883, CHN=899).

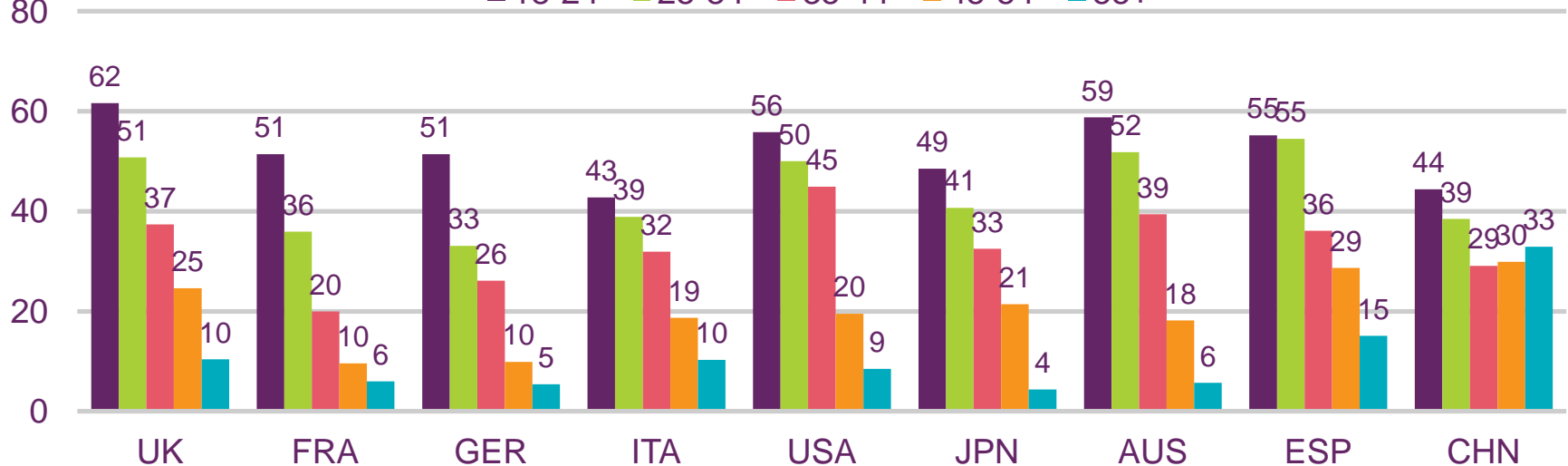
Q10. Which, if any, of the following activities do you use your mobile phone for?

# Figure 5.26

## Use of mobile phones to visit social networking sites, by age

Mobile owners accessing social networking sites (%)

■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+



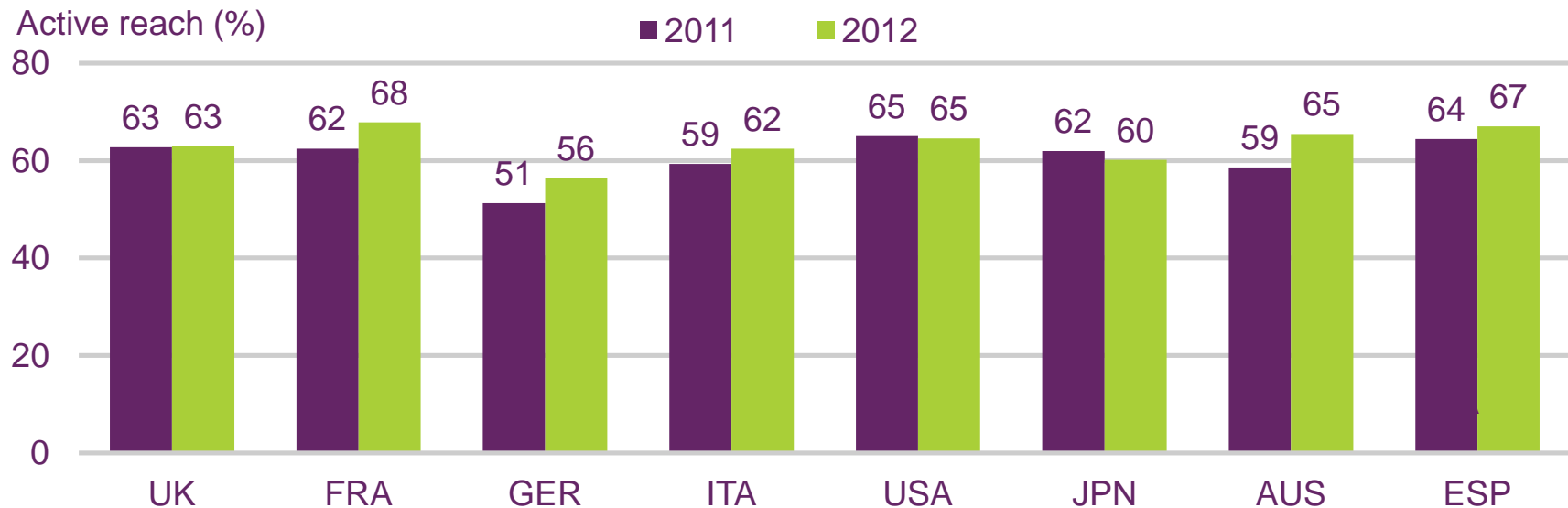
Source: Ofcom consumer research October 2012

Base: All respondents ages 18+, who own a smartphone and/or a mobile phone (UK=1011, FRA=951, GER=967, ITA=994, USA=857, JPN=628, AUS=919, ESP=969, CHN=945).

Q10. Which, if any, of the following activities do you use your mobile phone for?

## Figure 5.27

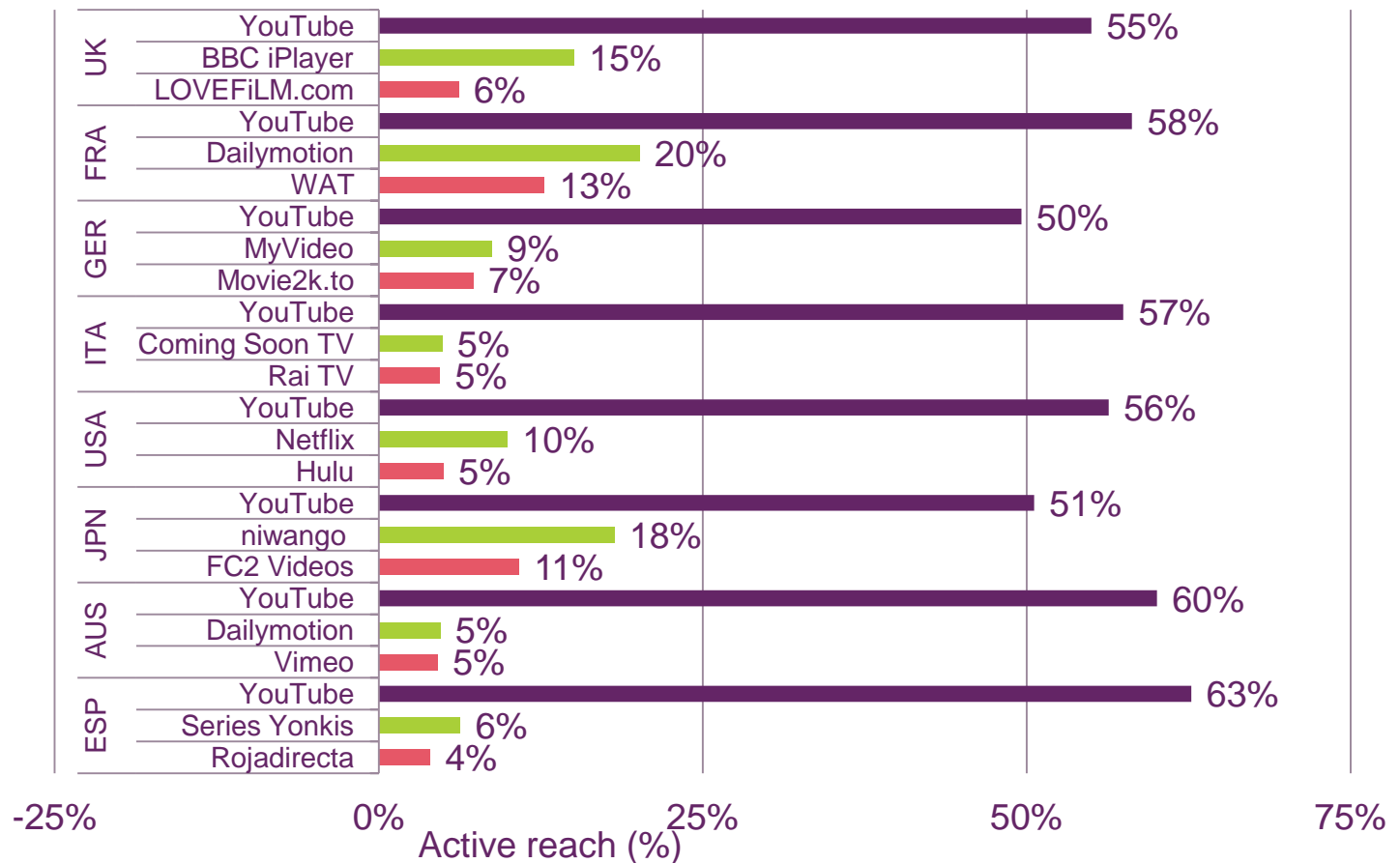
### Active reach of online video websites on laptop and desktop computers



Source: Nielsen, August 2012 and August 2011, home and work panel, applications included

# Figure 5.28

## Top three online video websites among laptop and desktop users

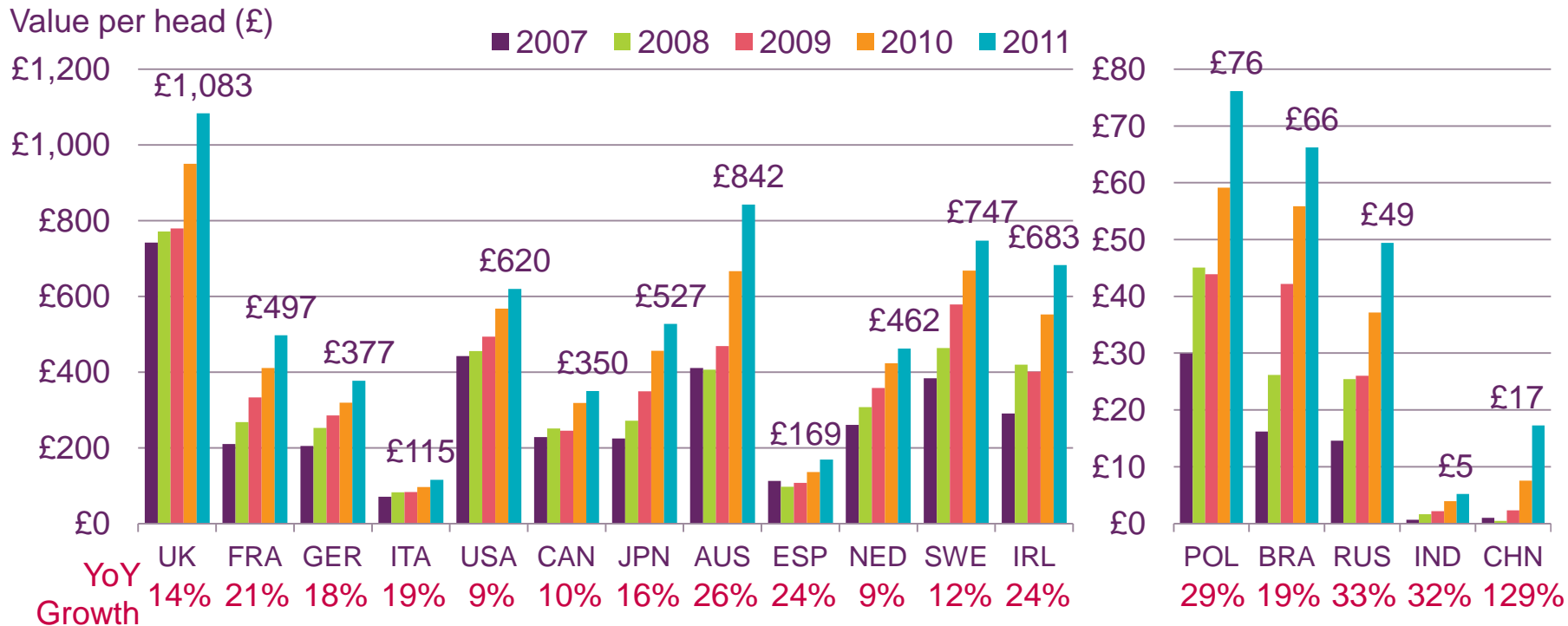


Source: Nielsen, August 2012, home and work panel, applications included



# Figure 5.29

## Value of B2C e-commerce per head 2007-12

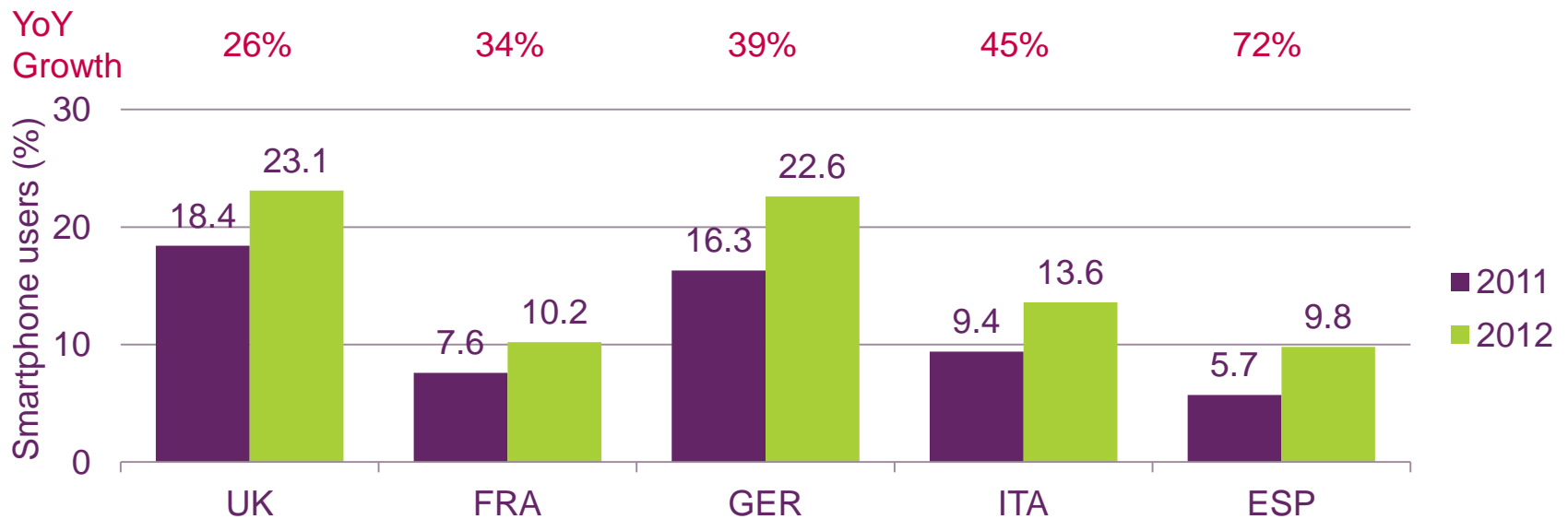


Source: IMRG B2C Global e-Commerce Overview 2011 Update 01, June 2011; IMRG B2C Global e-Commerce Overview 2012, May 2012

Notes: Values converted from Euros to British Sterling (£1 = €1.1536). Population figures from US Census Bureau (end of year estimates from mid-year values)

## Figure 5.30

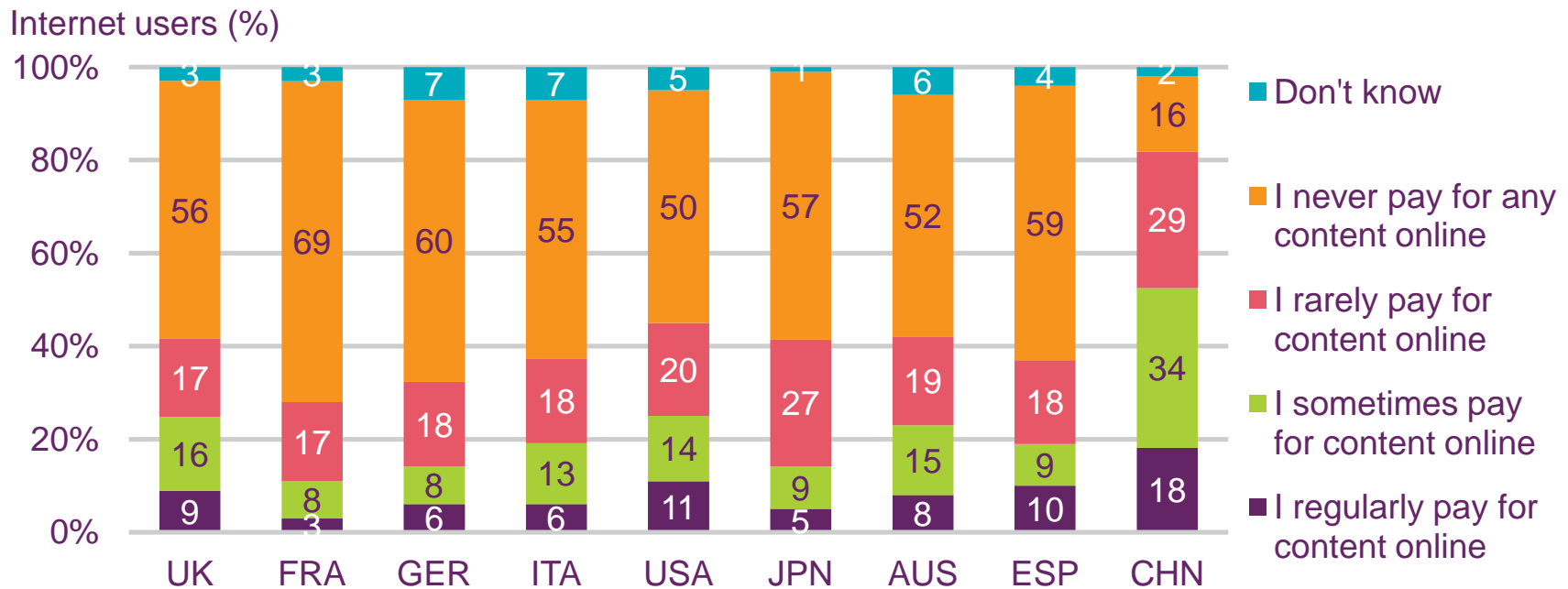
### Smartphone users accessing online shopping websites



Source: comScore MobiLens, 3 month average ending May 2011 vs May 2012

# Figure 5.31

## Frequency of purchasing digital content online



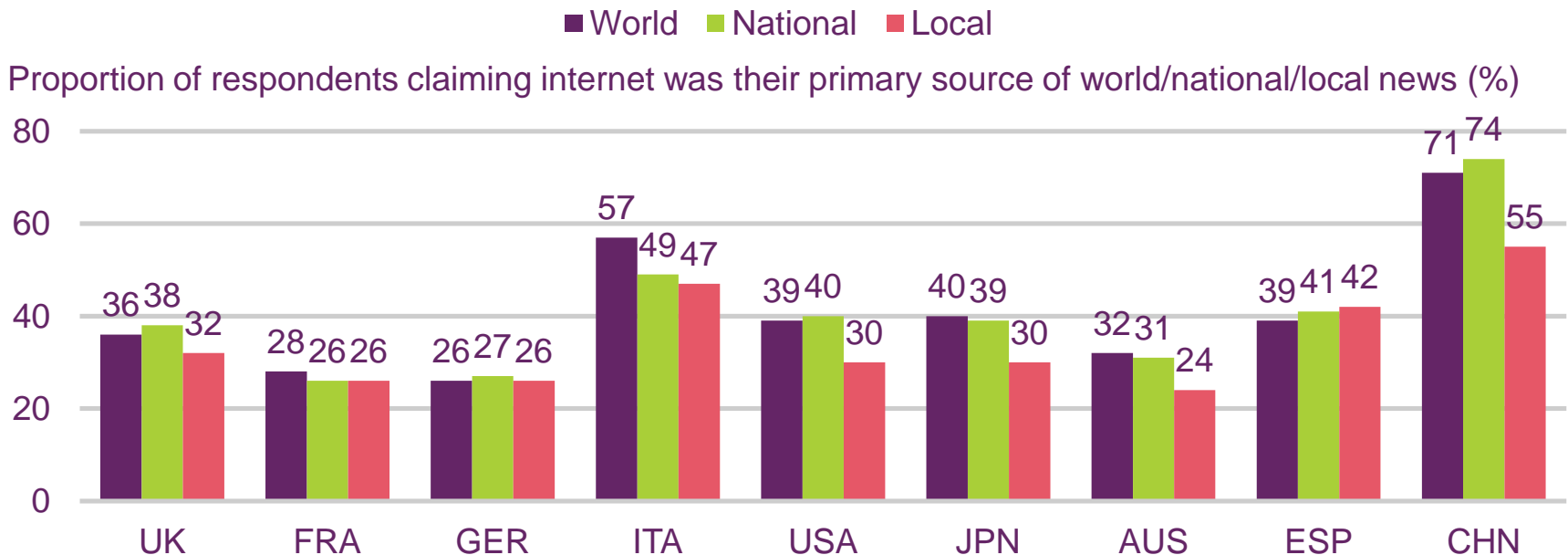
Source: Ofcom consumer research September 2012.

Base: All respondents, UK=1065, FRA=1016, GER=1024, ITA=1015, USA=1010, JPN=1004, AUS=1007, ESP=1001, CHN=1010.

Q14. Which of the following best describes your behaviour with regards to paying for digital content online? Examples of digital content would be newspapers, TV programmes, films, e-books, music tracks, smartphone apps.

## Figure 5.32

### The internet as a primary source of news

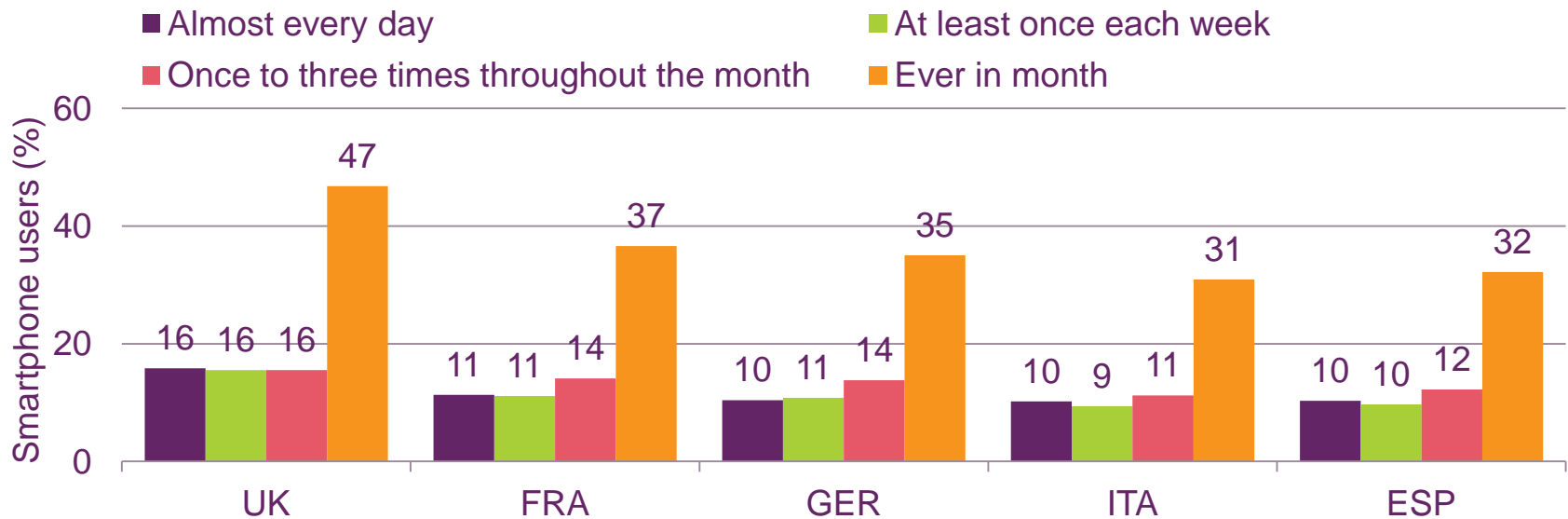


Source: Ofcom consumer research October 2011.

Base: UK=1065, FRA=1016, GER=1024, ITA=1015, USA=1010, JPN=1004, AUS=1007, ESP=1001, CHN=1010. Responses are cumulative figures for internet on computer/mobile phone/smartphone/tablet Q11. Which, if any, is your main source for the following information? News about the world; news about your country; news about your region/locality.

## Figure 5.33

Frequency of accessing news websites/apps among smartphone owners



Source: comScore MobiLens, 3 Month Average Ending January 2012

Base: Smartphone users aged 13+

**ENDS**