

5. Internet and Online Content

Figure 5.1

UK internet and online content market: key statistics

UK internet and online content market	2009	2010	2011	2012	2013	2014	2015	2016
¹ Internet take-up (%)	73	75	77	79	80	82	85	86
¹ Laptop take-up (%)	44	51	55	61	62	63	65	64
¹ Smartphone take-up (%)	n/a	n/a	27	39	51	61	66	71
¹ Tablet take-up (%)	n/a	n/a	2	11	24	44	54	59
¹ Consideration that the smartphone is the most important device for internet access (%)	n/a	n/a	n/a	n/a	15	23	33	36
² Total digital audience (million)	n/a	n/a	n/a	n/a	n/a	n/a	47.5	50.3
³ Digital advertising expenditure (£bn)	3.6	4.1	4.8	5.4	6.3	7.3	8.6	n/a
³ Mobile advertising expenditure (£m)	38	83	203	529	1021	1631	2627	n/a

Source: ¹Ofcom consumer research, ²comScore MMX Multi-Platform, UK, data taken for March 2015 and March 2016; ³IAB/PwC Digital Adspend

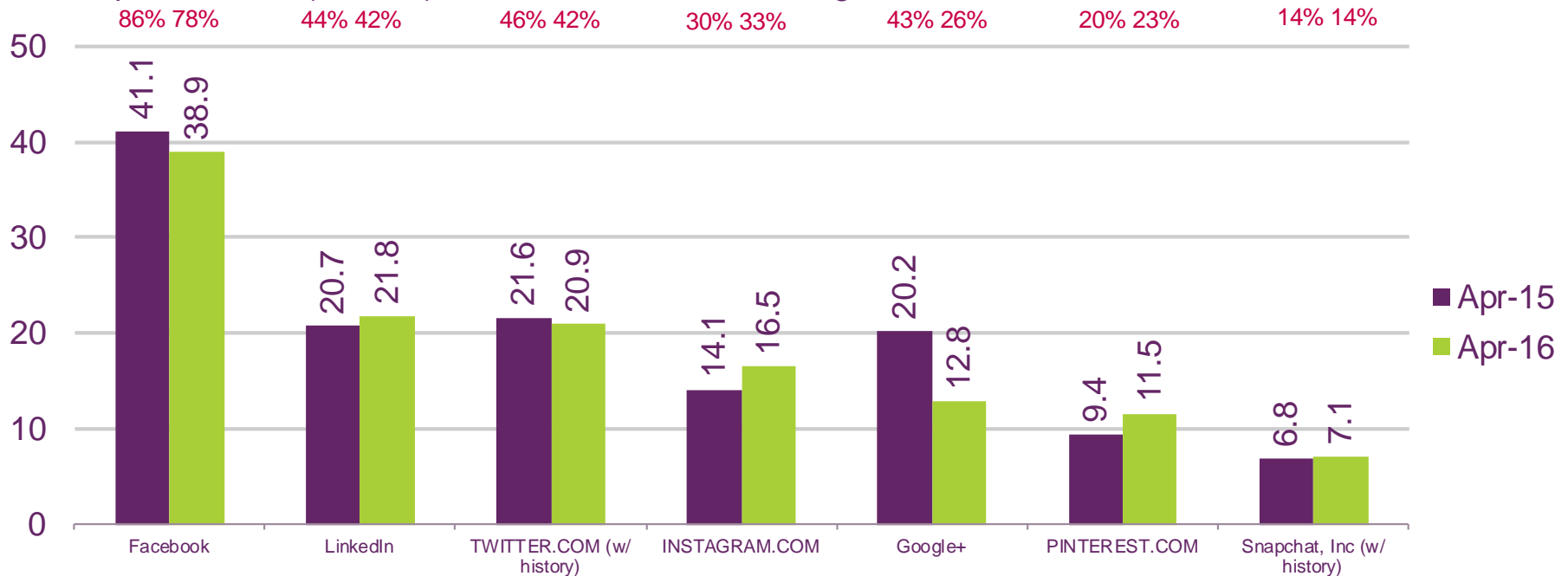
Note: With the exception of internet, and internet on mobile phone, take-up data, all data relate to the calendar year, so 2016 data are currently unavailable.

Note: Caution is advised in comparing values before and after February 2011 because of a change in comScore methodology.

Figure 5.2

Digital audience of selected social networking services: April 2015 and April 2016

Unique audience (millions) and reach as a % of total digital audience



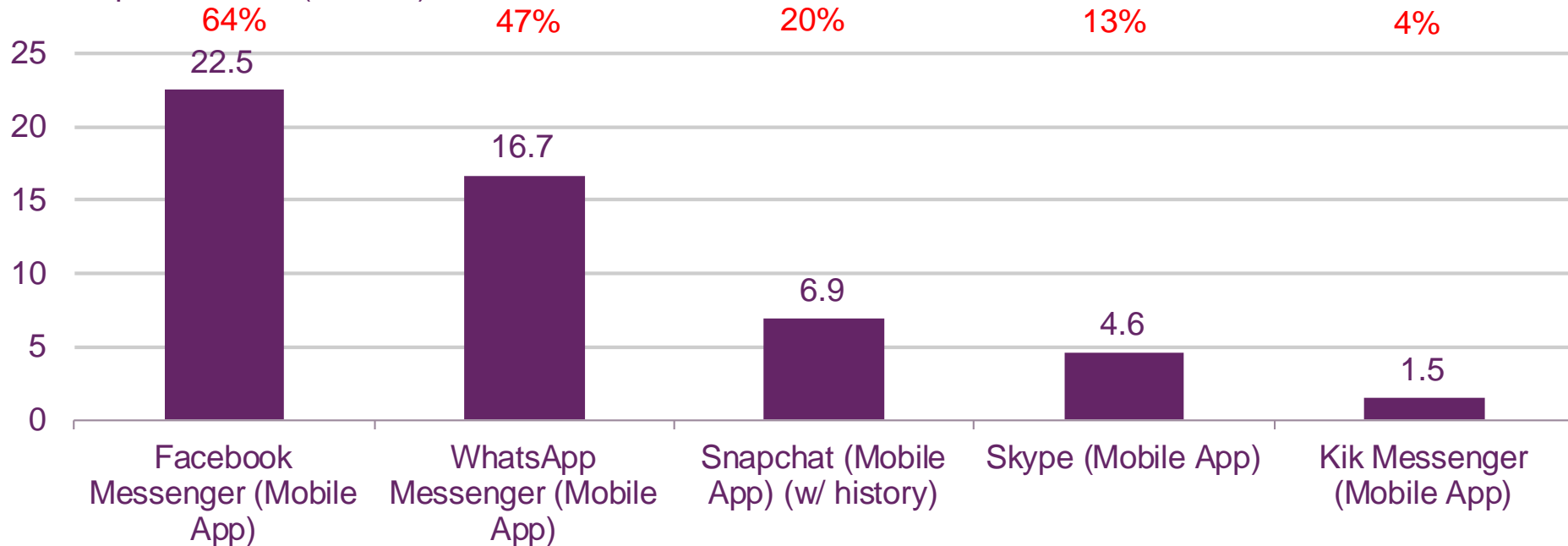
Source: comScore MMX Multi-Platform, UK, April 2015 and April 2016

Note: Entities cited from comScore MMX Multi-Platform: [P] Facebook, [P] LinkedIn, [M] Twitter (w/ history), [M] INSTAGRAM.COM, [C] Google+, [P] PINTEREST.COM. MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.3

Mobile audience of selected mobile messaging apps: April 2016

Unique audience (millions) and reach as a % total mobile audience



Source: comScore Mobile Metrix, UK, April 2016

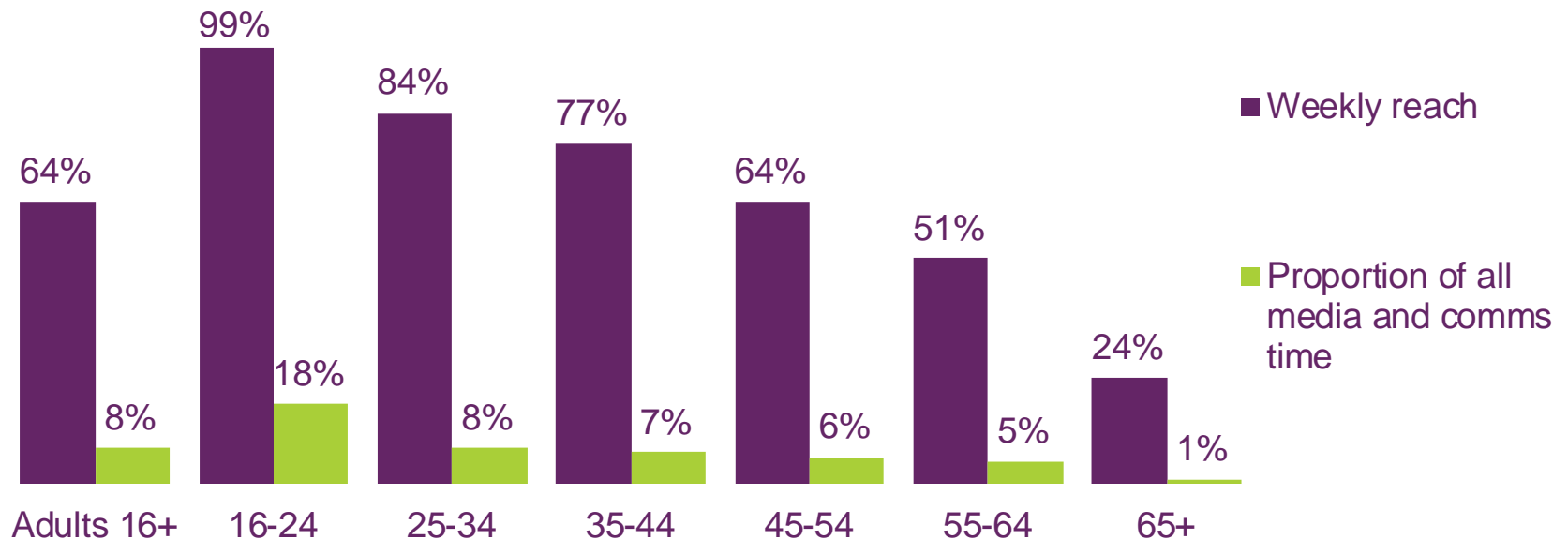
Note: Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. comScore entities used were: [S] Facebook Messenger (Mobile App), [C] WhatsApp Messenger (Mobile app). [M] Snapchat (Mobile App) (w/history), [S] Skype (Mobile App), [M] Kik Messenger (Mobile App)

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.4

Social media use, by age group

Reach and proportion of time spent on social media (%)



Source: Ofcom Digital Day 2016

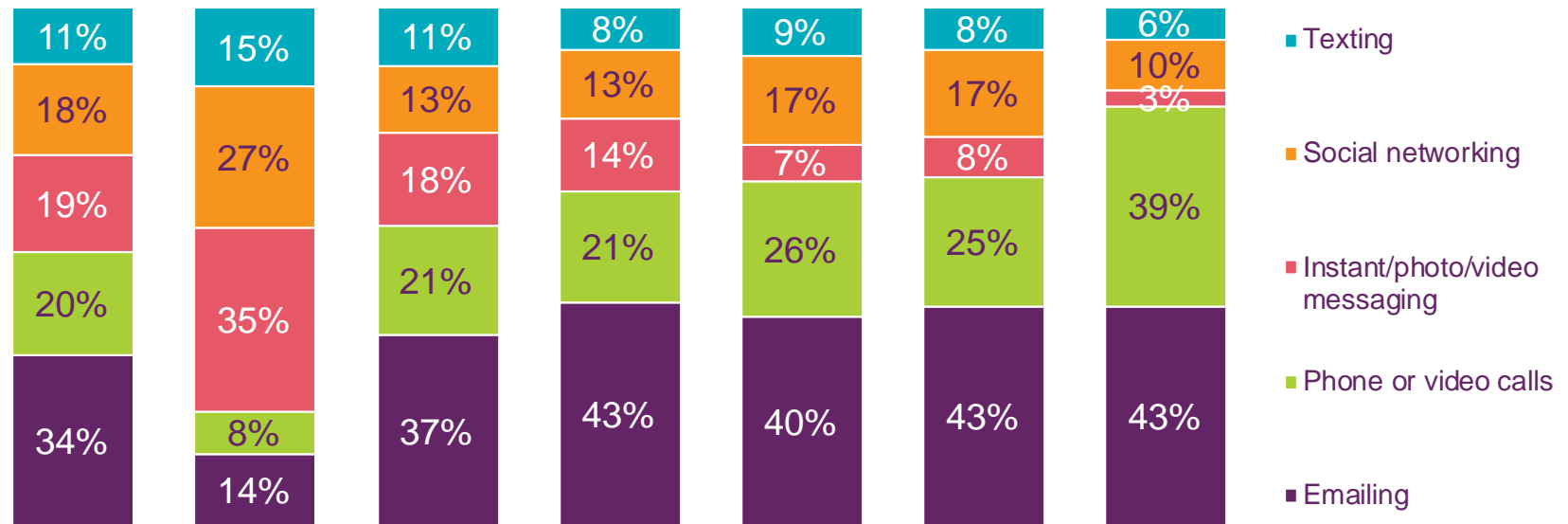
Adult diary: Chart shows the proportion of adults who recorded communicating through a social networking site (D) or using a social media site for certain types of media activity (E2) across their diary week. Proportion of media and comms time is calculated from the durations of these activities (B2).

Base: Adults aged 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

Figure 5.5

Proportion of time spent communicating attributed to activities, by age group

Proportion of communicating time (%)



Average daily minutes spent communicating*

Age Group	Average daily minutes spent communicating*
Adults 16+	2h 10m
16-24	4h 14m
25-34	2h 34m
35-44	2h 27m
45-54	2h 10m
55-64	1h 24m
65+	0h 43m

Source: Ofcom Digital Day 2016

Adult diary: Chart shows the proportion of all communication time (B2) attributed to each activity (D) by age group.

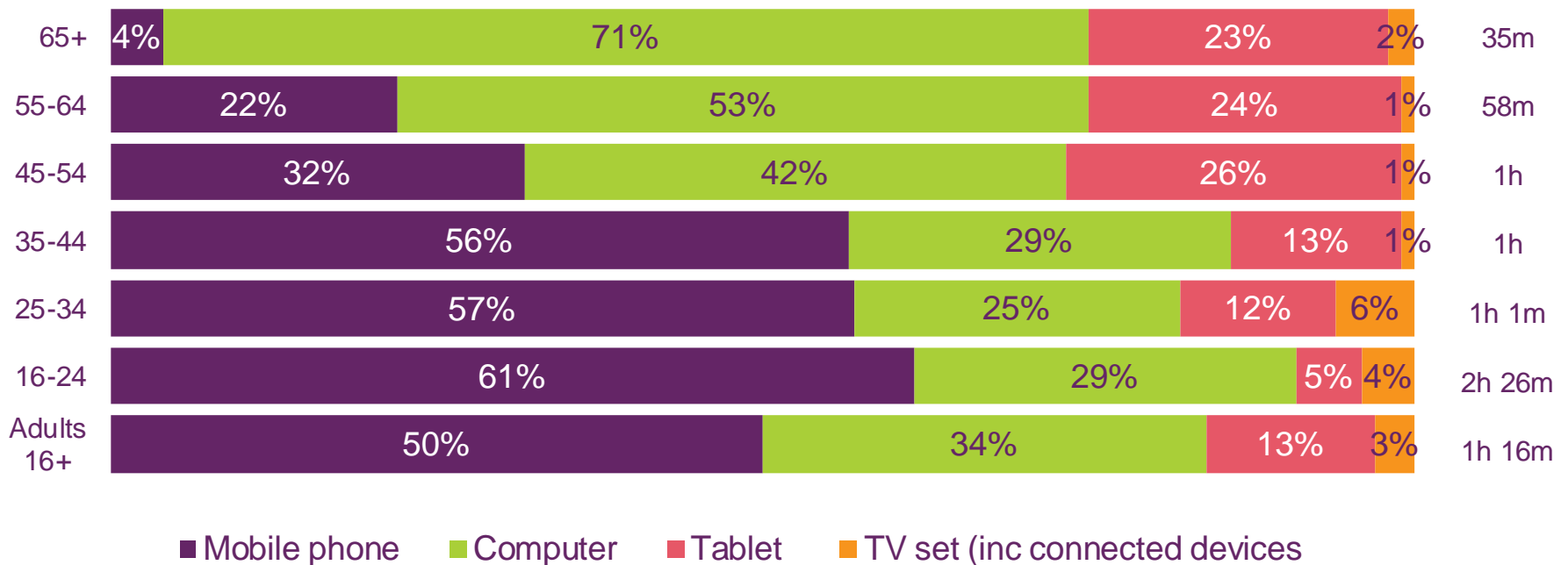
Base: Adults aged 16+ (1512), 16-24 (129), 25-34 (189), 35-44 (282), 45-54 (299), 55-64 (259), 65+ (354)

Figure 5.6

Proportion of social media time attributed to devices, by age group

Proportion of social media time (%)

Average daily minutes on social media*



Source: Ofcom Digital Day 2016

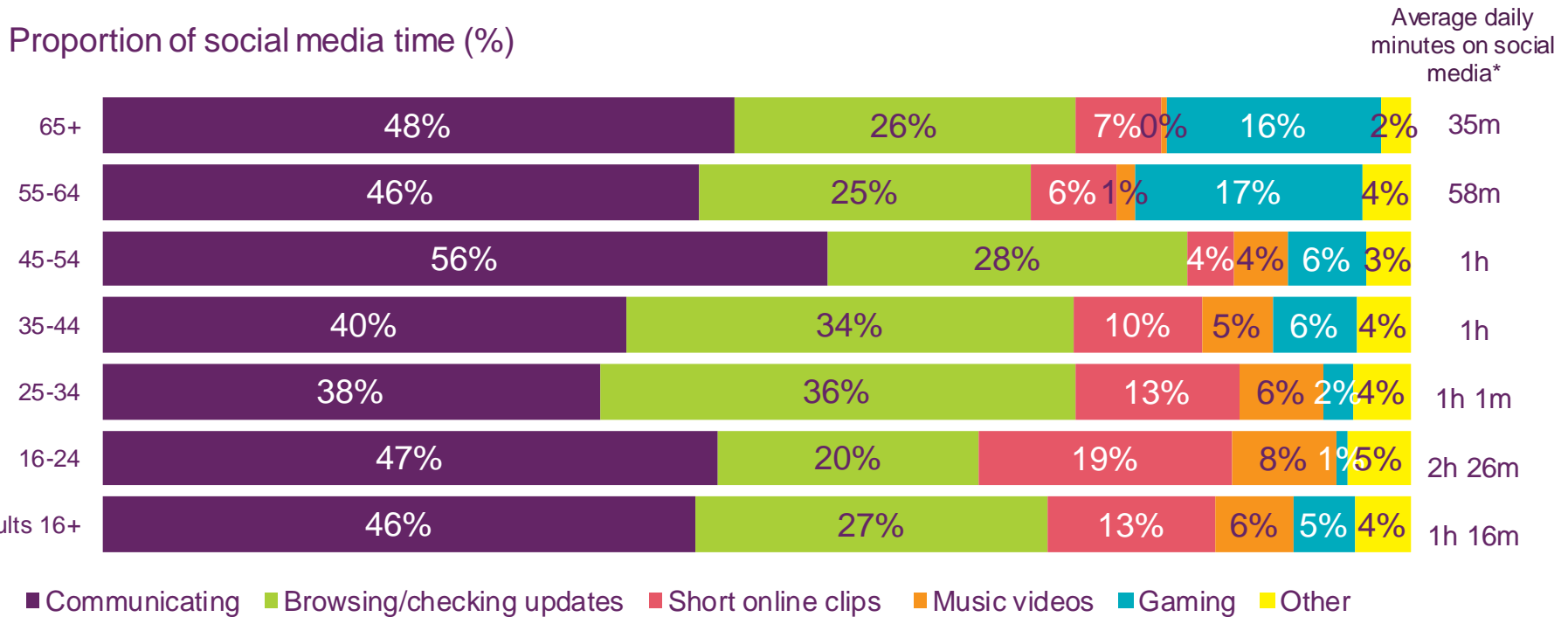
Adult diary: Chart shows the proportion of all social media time (B2) attributed to each activity by age group.

*The average daily minutes figure is among those who used social media at all across their diary week on any device (sum figure)

Base: Adults aged 16+ who used any social media during their diary week (991)

Figure 5.7

Proportion of social media time attributed to activities, by age group



Source: Ofcom Digital Day 2016

Base: Adults aged 16+ who used any social media during their diary week (991)

Adult diary: Chart shows the proportion of all social media time (B2) attributed to each activity by age group.

*The average daily minutes figure is among those who used social media at all across their diary week on any device (sum figure)

Note: 'Other' consists of streamed music, sports/news updates and other online news

Figure 5.8

Selected social media behaviour among mobile internet users: April 2016

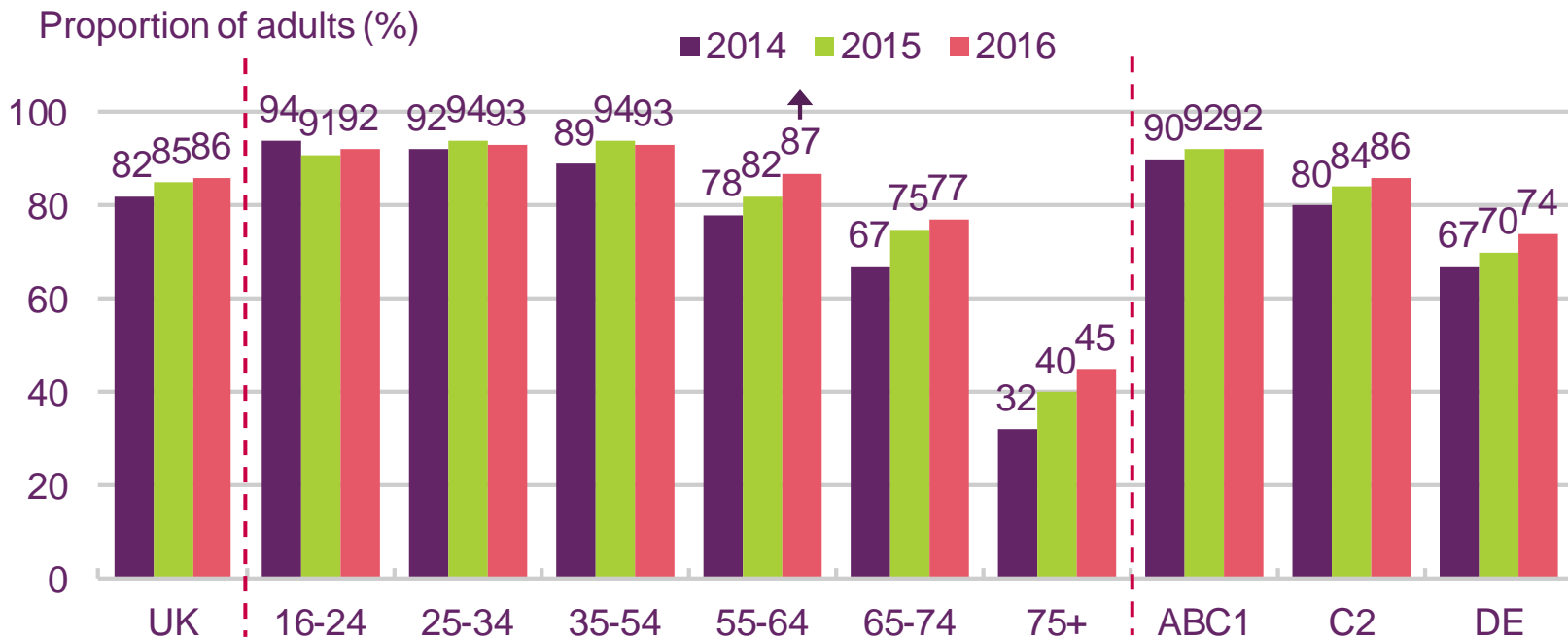


Source: comScore MobiLens Plus, UK three month averages ending April 2016

Base: Mobile internet users 13+

Figure 5.9

Proportion of adults with home internet access



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ (n=3737)

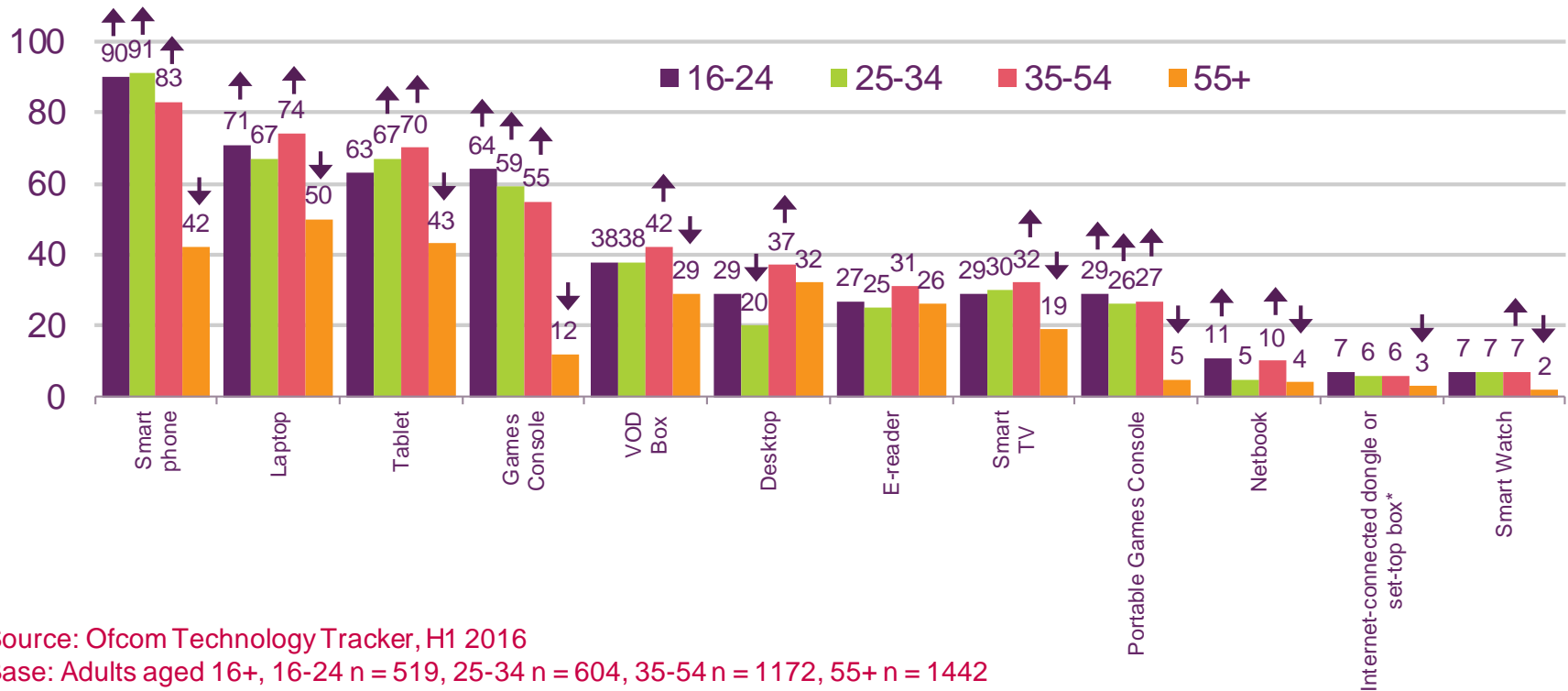
Significance testing: Arrows indicate any significant differences at the 95% confidence level between UK 2015 and UK 2016, between each age group in 2015 and 2016 and between each socio-economic group in 2015 and 2016.

QE2: Do you or does anyone in your household have access to the internet at home (via any device, e.g. PC, laptop, mobile phone etc.)?

Figure 5.11

Take-up of internet-enabled devices, by age

Proportion of adults (%)



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+, 16-24 n = 519, 25-34 n = 604, 35-54 n = 1172, 55+ n = 1442

Note: Ranked by overall household ownership

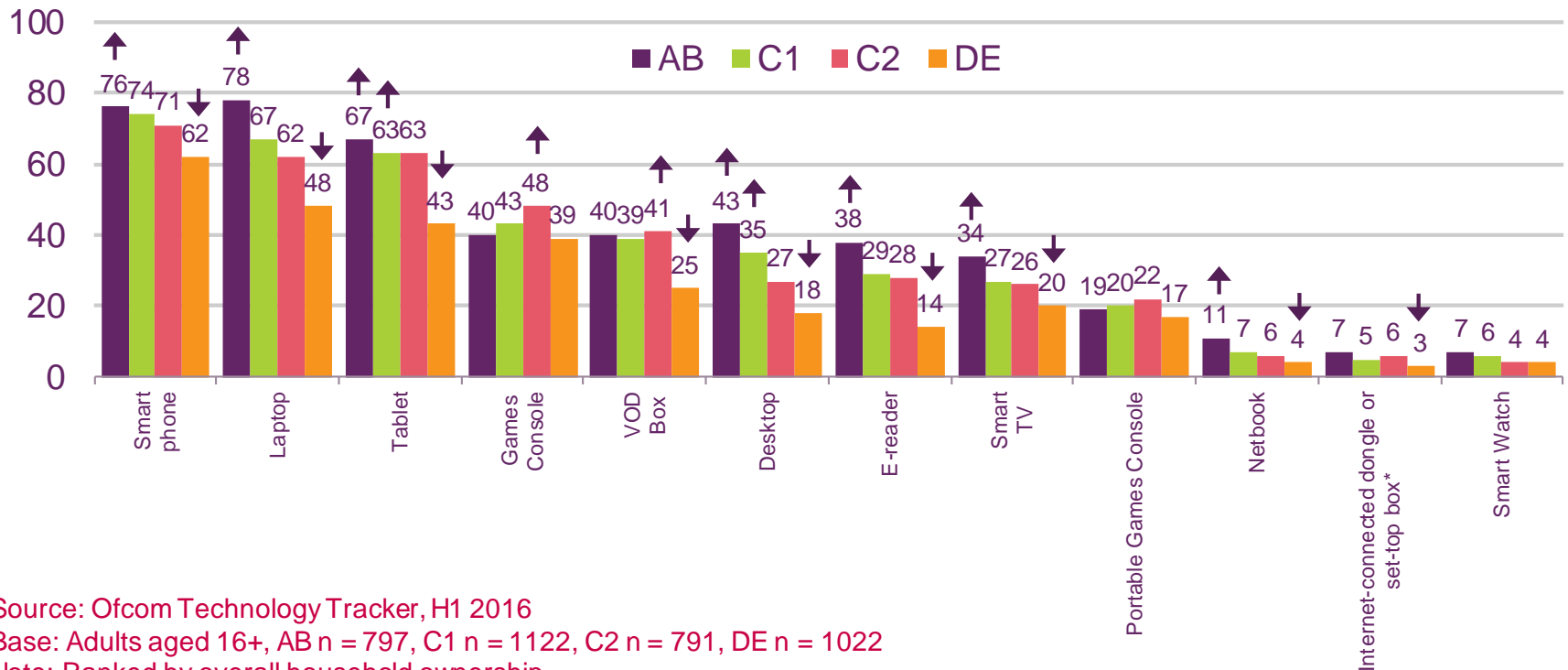
Internet-connected dongle or set-top box includes NOW TV set-top box, Roku, Google Chrome, Amazon Fire TV stick, Amazon Fire TV, Apple TV

Significance testing: Arrows indicate any significant differences at the 95% confidence level between UK 2016 and each age group

Figure 5.12

Take-up of internet-enabled devices, by socio-economic group

Proportion of adults (%)



Source: Ofcom Technology Tracker, H1 2016

Base: Adults aged 16+, AB n = 797, C1 n = 1122, C2 n = 791, DE n = 1022

Note: Ranked by overall household ownership

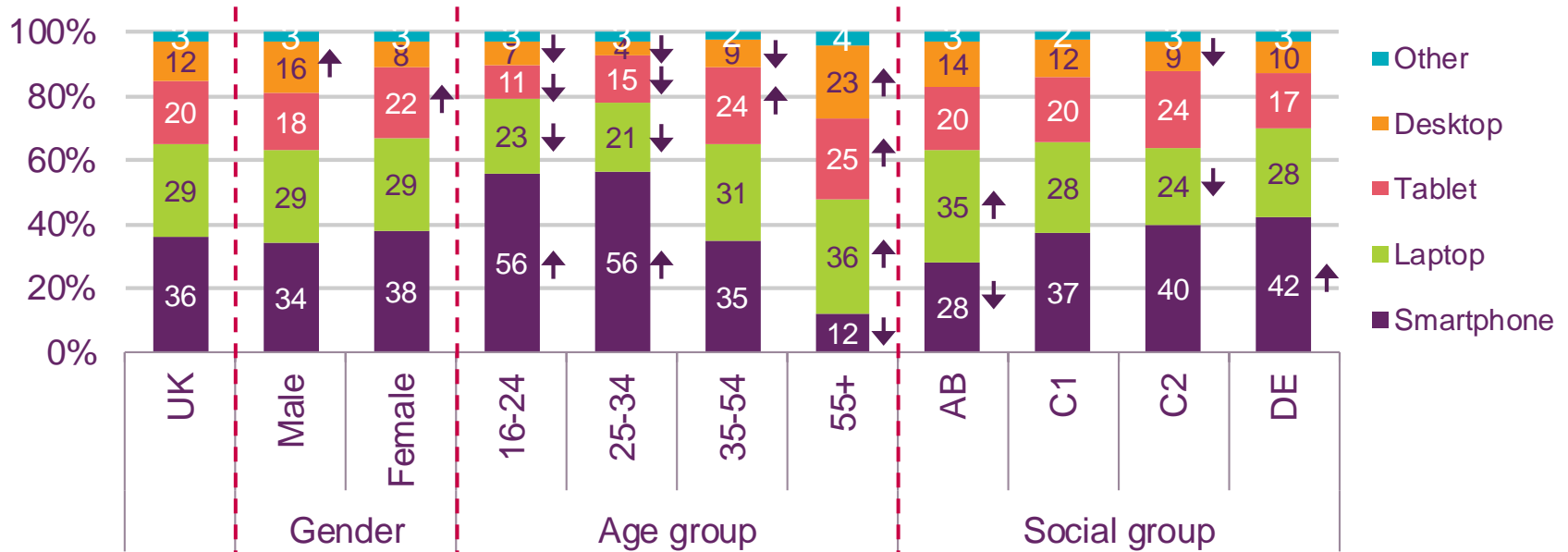
Internet-connected dongle or set-top box includes NOW TV set-top box, Roku, Google Chrome, Amazon Fire TV stick, Amazon Fire TV, Apple TV

Significance testing: Arrows indicate any significant differences at the 95% confidence level between UK 2016 and each socio-economic group

Figure 5.13

Most important device for internet access

Internet users (%)



Source: Ofcom Technology Tracker, H1 2016

Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3100 UK).

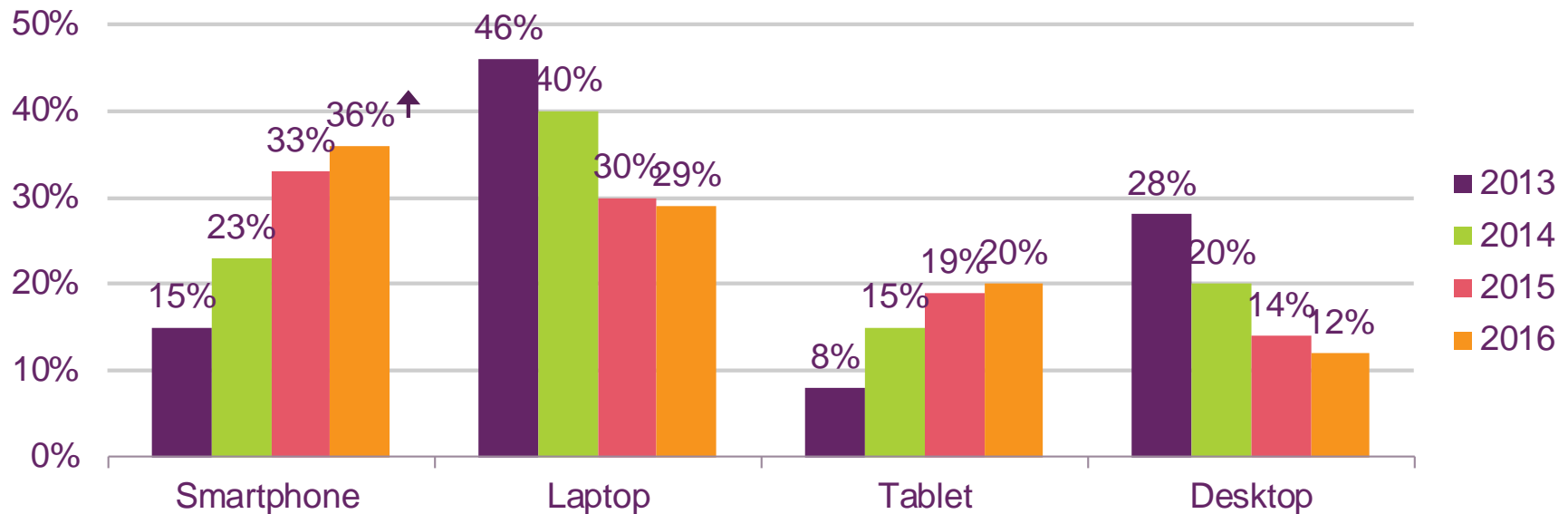
Significance testing: Arrows indicate any significant differences at the 95% confidence level between males and females, between UK 2016 and each age group and between UK 2016 and each socio-economic group.

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere? 'Other' responses include: netbook, games console, e-reader, TV set, smart watch, other portable/ handheld device, other device, none and 'don't know'.

Figure 5.14

Most important device for internet access: 2013-2016

Internet users (%)



Source: Ofcom Technology Tracker, Q1 2013-2014, H1 2015-2016

Base: All adults aged 16+ who use the internet at home or elsewhere (2016 n = 3100 UK).

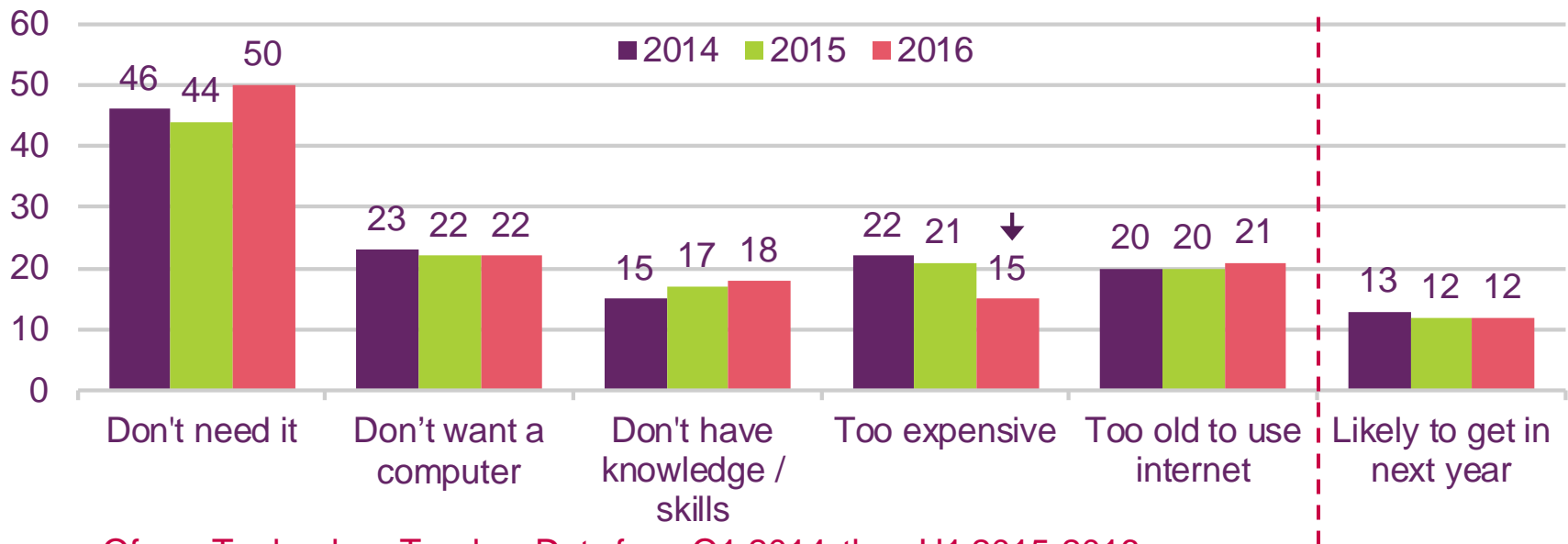
Significance testing: Arrows indicate any significant differences at the 95% confidence level between 2016 and 2015 for each device.

QE40: Which is the most important device you use to connect to the internet, at home or elsewhere?

Figure 5.16

Main reasons for not having a home broadband connection

Proportion of those without broadband (%)



Source: Ofcom Technology Tracker. Data from Q1 2014, then H1 2015-2016

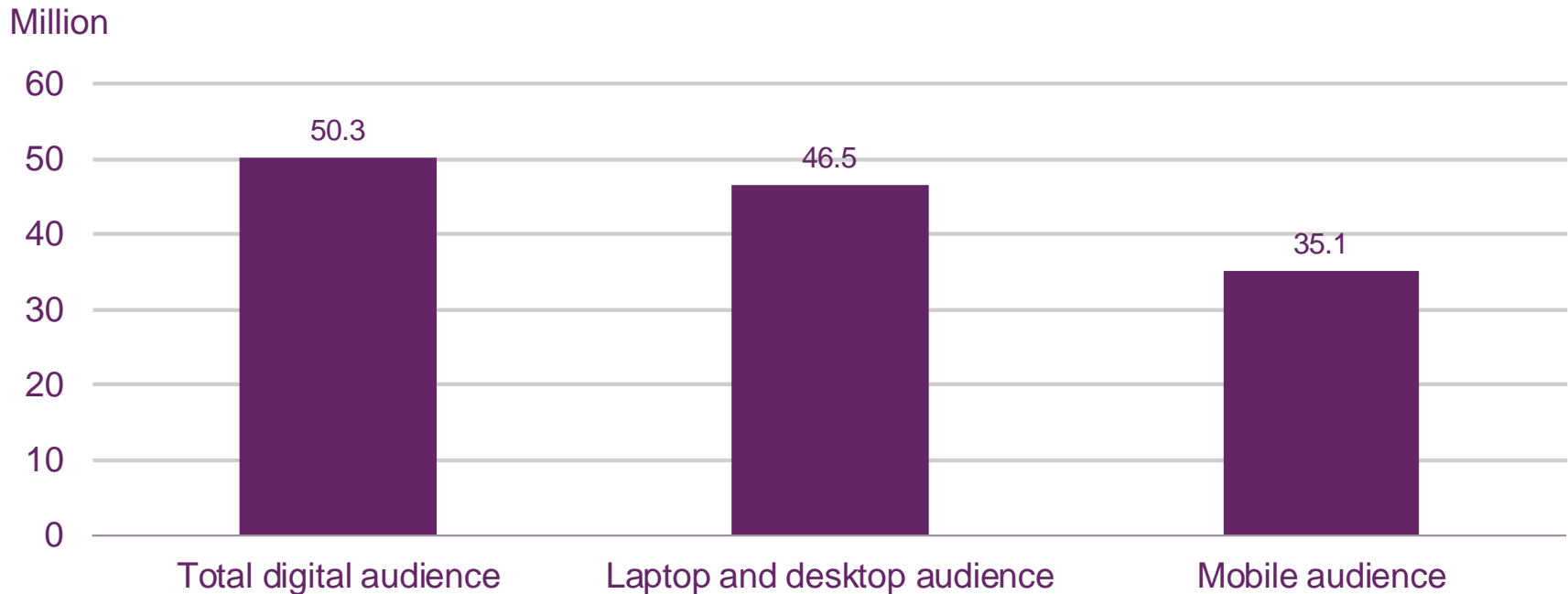
Base: All adults without the internet aged 16+ (n=650)

Significance testing: Arrows indicate any significant differences at the 95% confidence level between UK 2015 and UK 2016.

QE25A: Why are you unlikely to get internet access at home in the next 12 months?

Figure 5.17

Active internet audience: March 2016

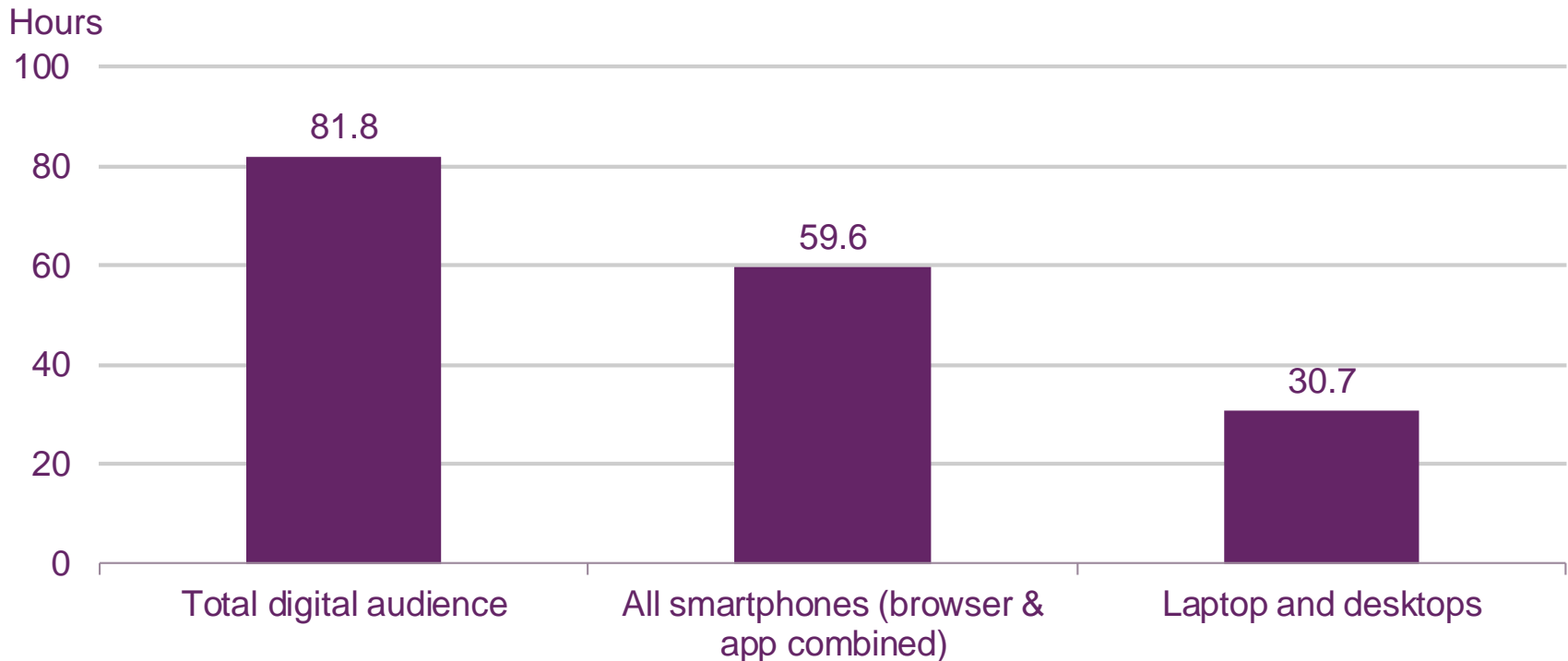


Source: comScore MMX, UK, home and work panel, March 2016; comScore MMX Multi-Platform, UK, March 2016; comScore Mobile Metrix UK, March 2016

Note: 'Digital audience' is the unique audience across desktop/laptops and mobile. Mobile audience includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Figure 5.18

Average time spent online: March 2016

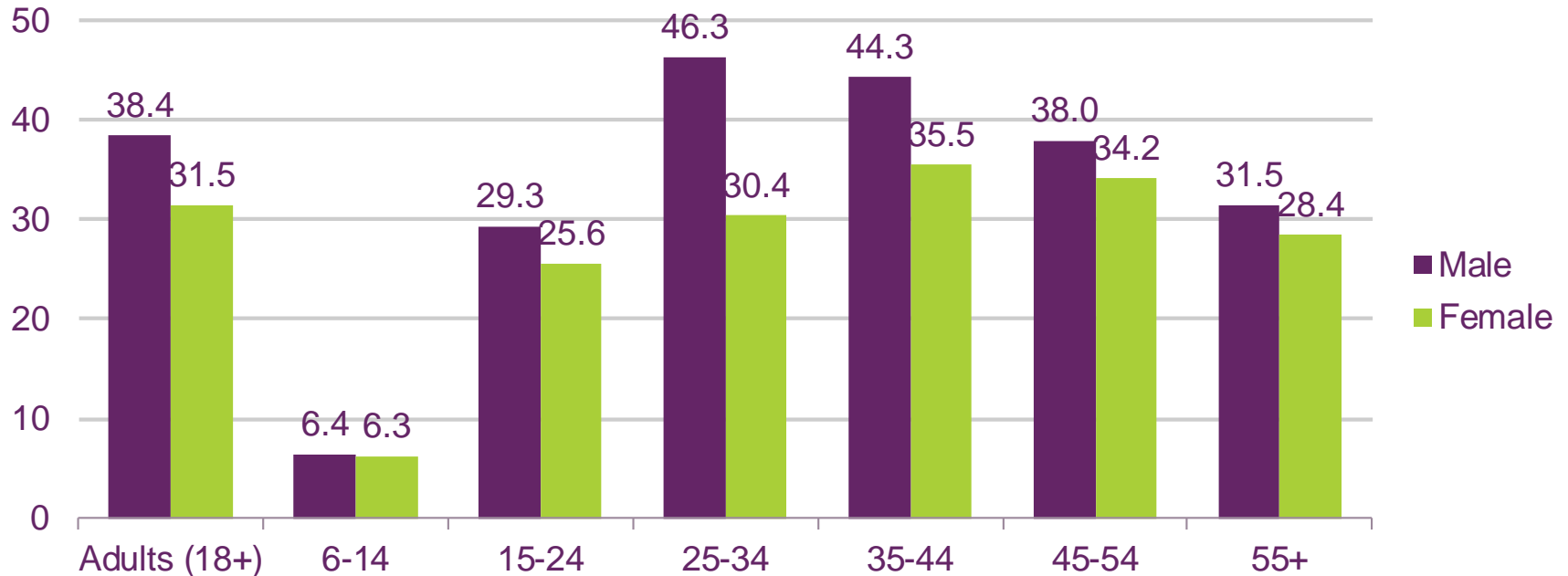


Source total digital audience: comScore MMX Multi-Platform, UK, March 2016, (bases include ages 6+ for desktops/laptops, 18+ for mobile devices). Source all smartphones: comScore Mobile Metrix, UK, 18+, March 2015. Source laptops and desktops: comScore MMX, home and work panel, UK, 6+, March 2015; Note: All smartphones, includes iPhones and Android handsets, browser and application use.

Figure 5.19

Average time online on a laptop/desktop, by age and gender: March 2016

Hours

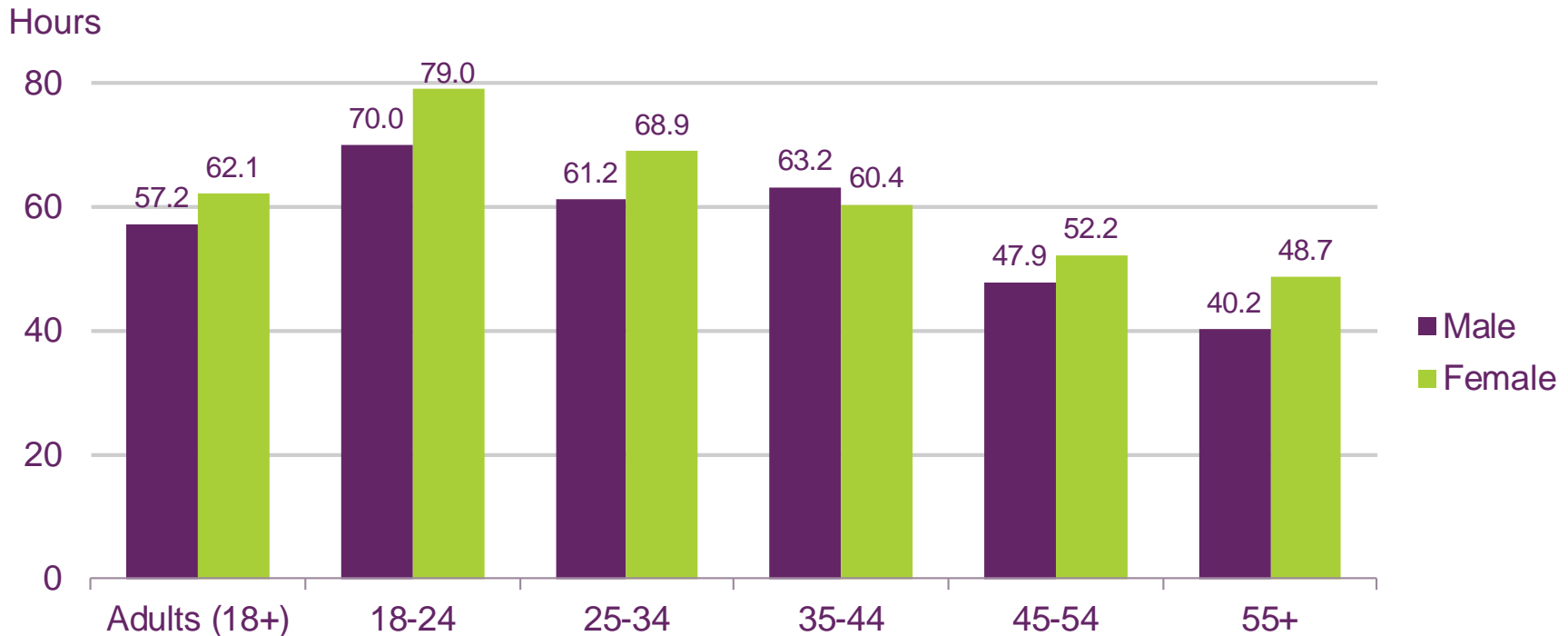


Source: comScore MMX, home and work panel, March 2016

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 5.20

Average time online on a smartphone, by age and gender: March 2016



Source: comScore Mobile Metrix, March 2016. Browser and application access combined.

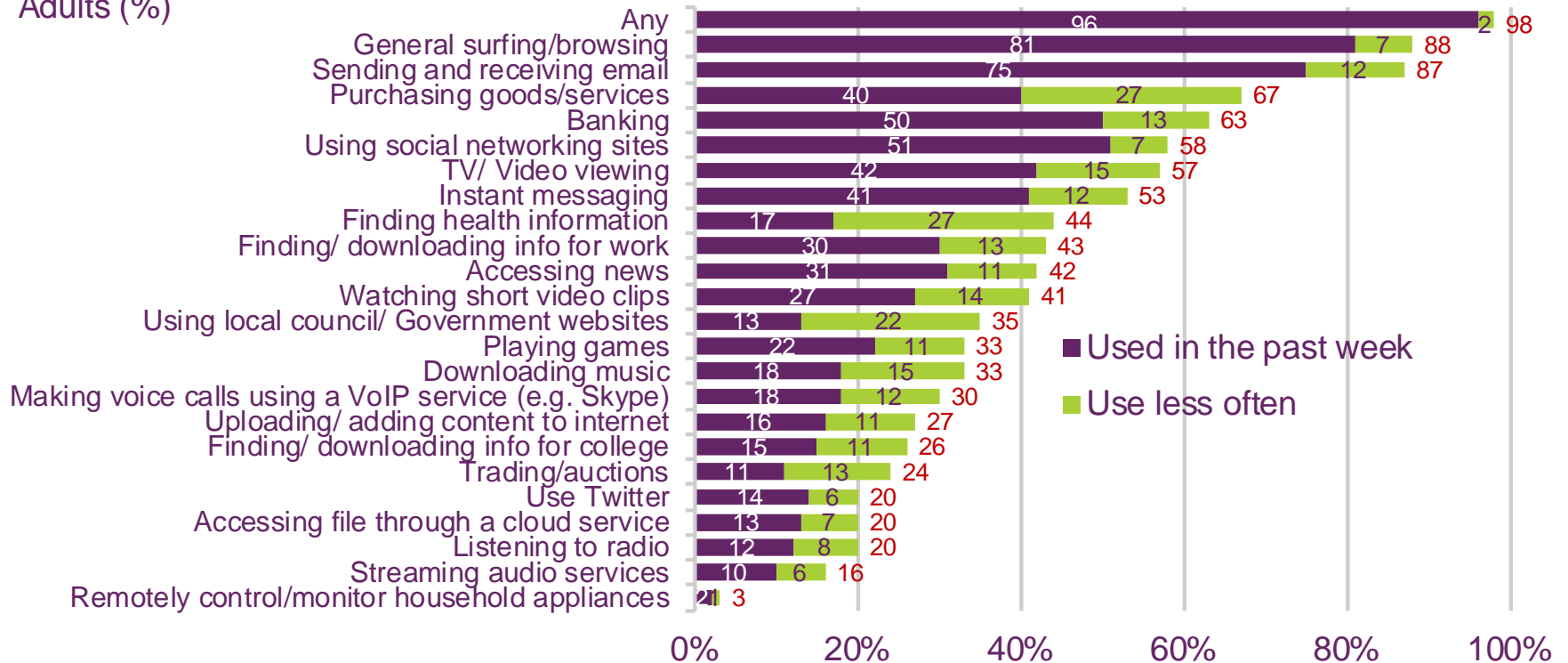
Note: Includes Android and iOS smartphones

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.21

Claimed use of the internet for selected activities

Adults (%)



Source: Ofcom Technology Tracker, H1 2016

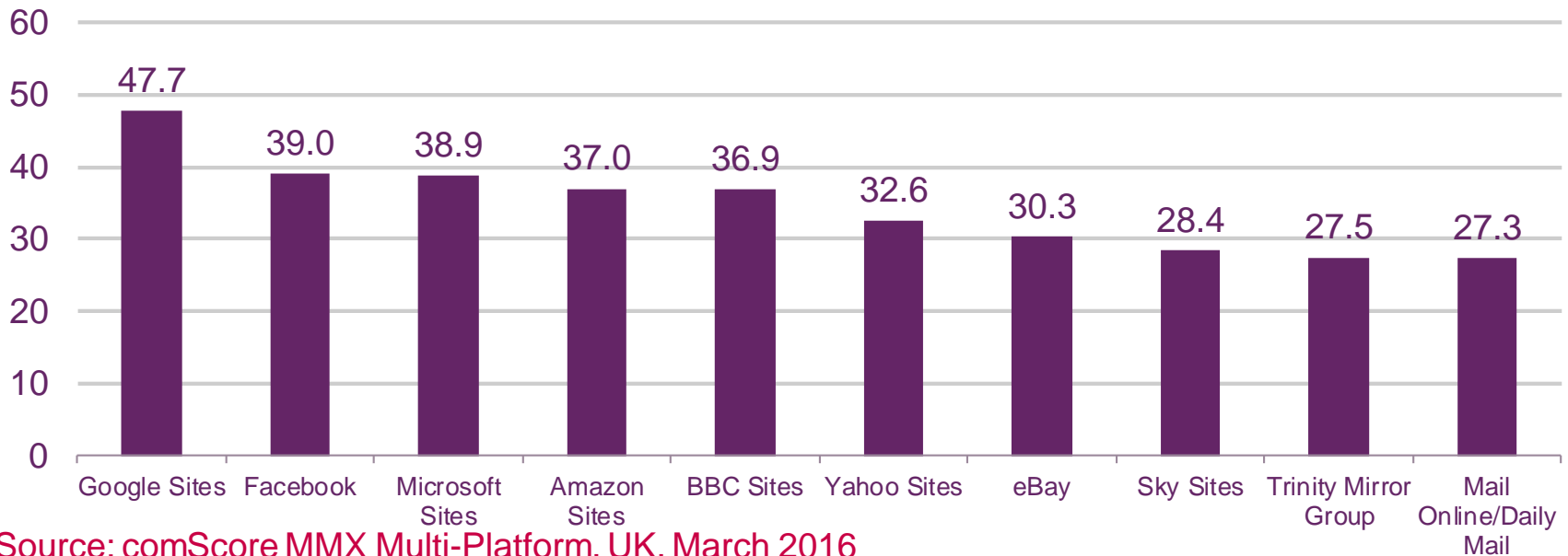
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 3100 UK)

QE5A: Which, if any, of these do you use the internet for?

Figure 5.22

Top ten most popular comScore Properties among the total digital audience: March 2016

Unique audience (millions)



Source: comScore MMX Multi-Platform, UK, March 2016

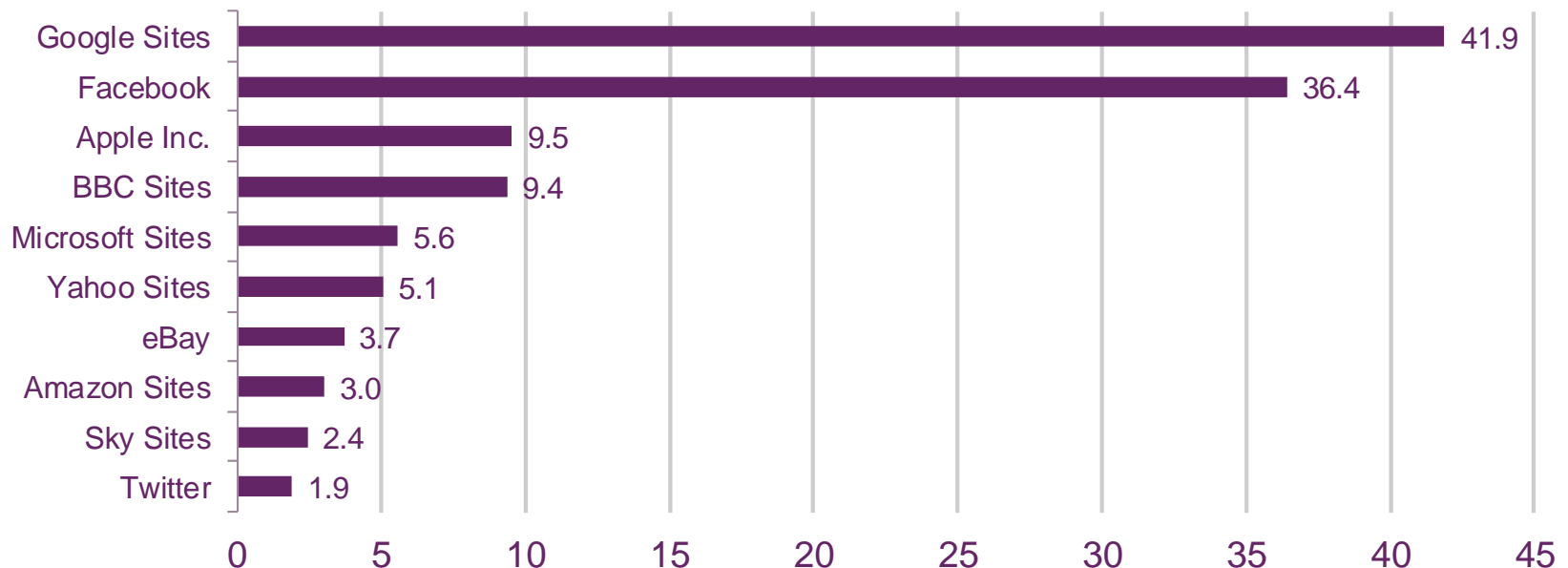
All sites listed are at the property level [P]. Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network and Wi-Fi mobile browsing and app use.

Note: Starting with July 2013 data, comScore added tablet data to the mobile data field of MMX Multi-Platform. Only those entities that have been tagged as part of the census network report tablet usage data.

Figure 5.23

Top ten comScore properties among the total digital audience, by time spent: March 2016

Total Minutes (billions)



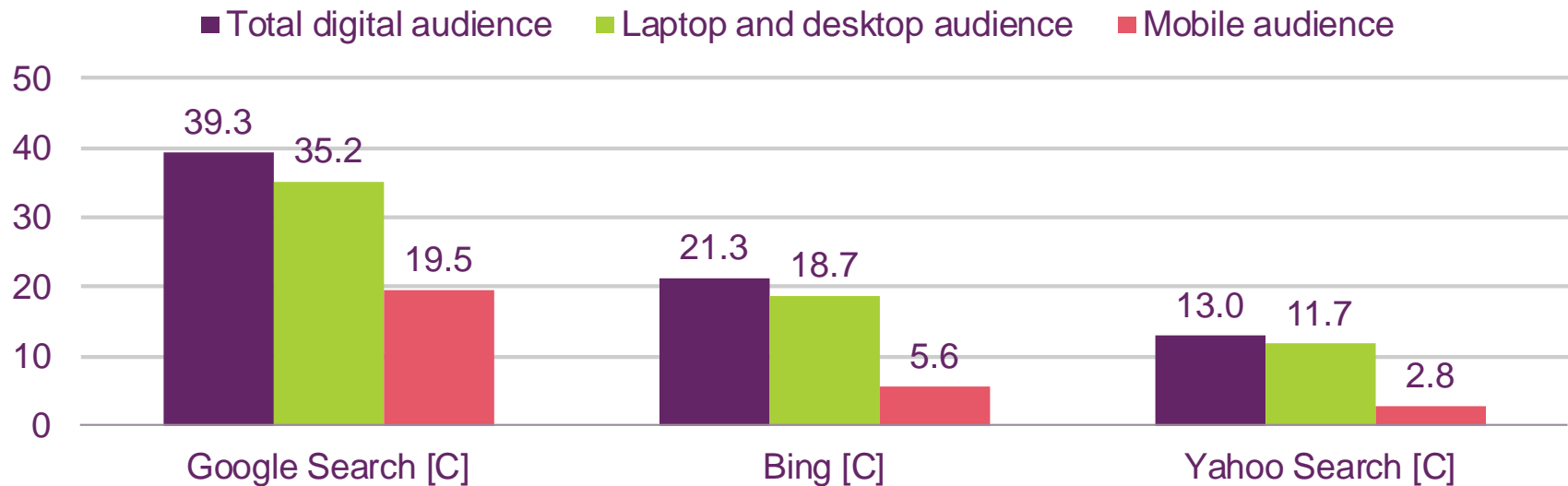
Source: comScore MMX Multi-Platform, UK, March 2016

Note: All sites listed are at the property level [P]. Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network and Wi-Fi mobile browsing and application data. It excludes time spent accessing audio content

Figure 5.24

Audience of search engines: March 2016

Unique audience (millions)

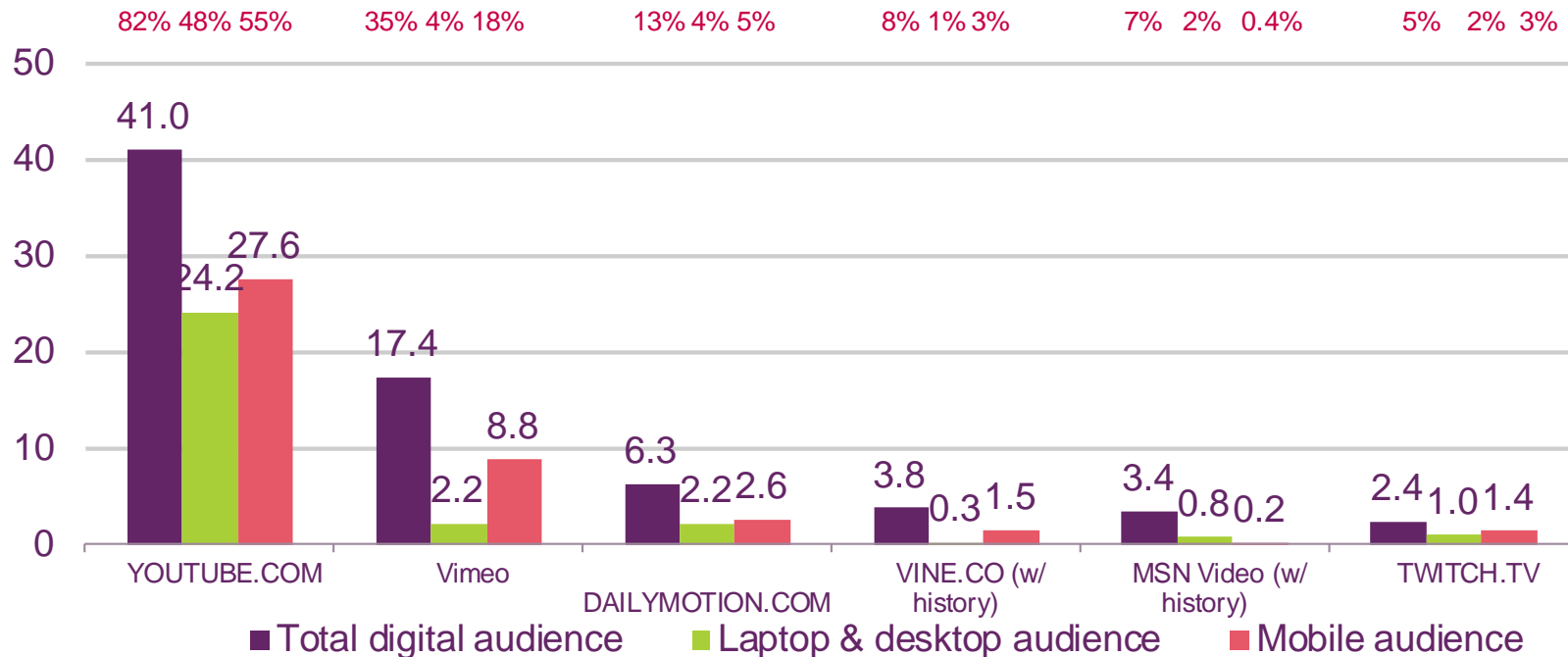


Source: comScore MMX Multi-Platform, comScore MMX, comScore Mobile Metrix, UK, March 2016
 MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use.
 'Total mobile' includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.
 Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.25

Unique audience for selected online video sharing sites: March 2016

Unique audience (millions) and reach as a % of total digital audience



Source: comScore MMX, UK, home and work panel, comScore MMX Multi-Platform, UK and comScore Mobile Metrix, UK. All March 2016

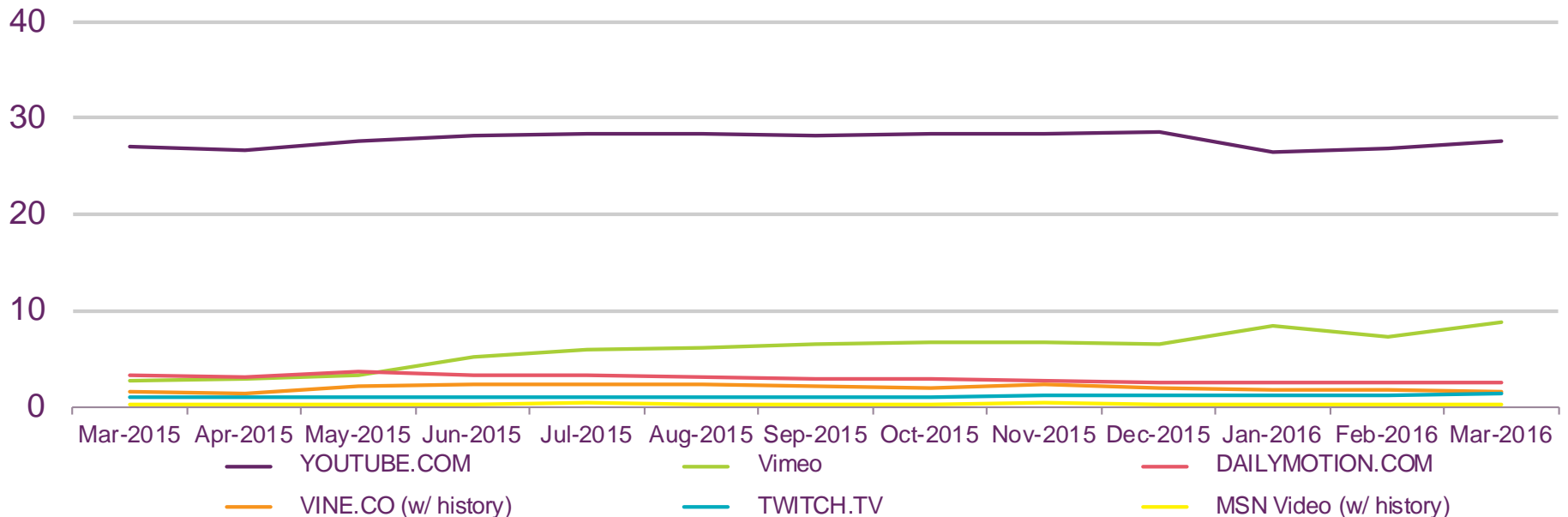
Note: MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees. comScore entities used were: [M] YOUTUBE.COM, [P] Vimeo, [P] DAILYMOTION.COM, [M] VINE.CO, [c] MSN Video (w/history), [P] TWITCH.TV

Figure 5.26

Unique audience of selected online video sharing sites on mobile phones: March 2015 to March 2016

Unique audience (millions)



Source: comScore Mobile Metrix, March 2015-March 2016

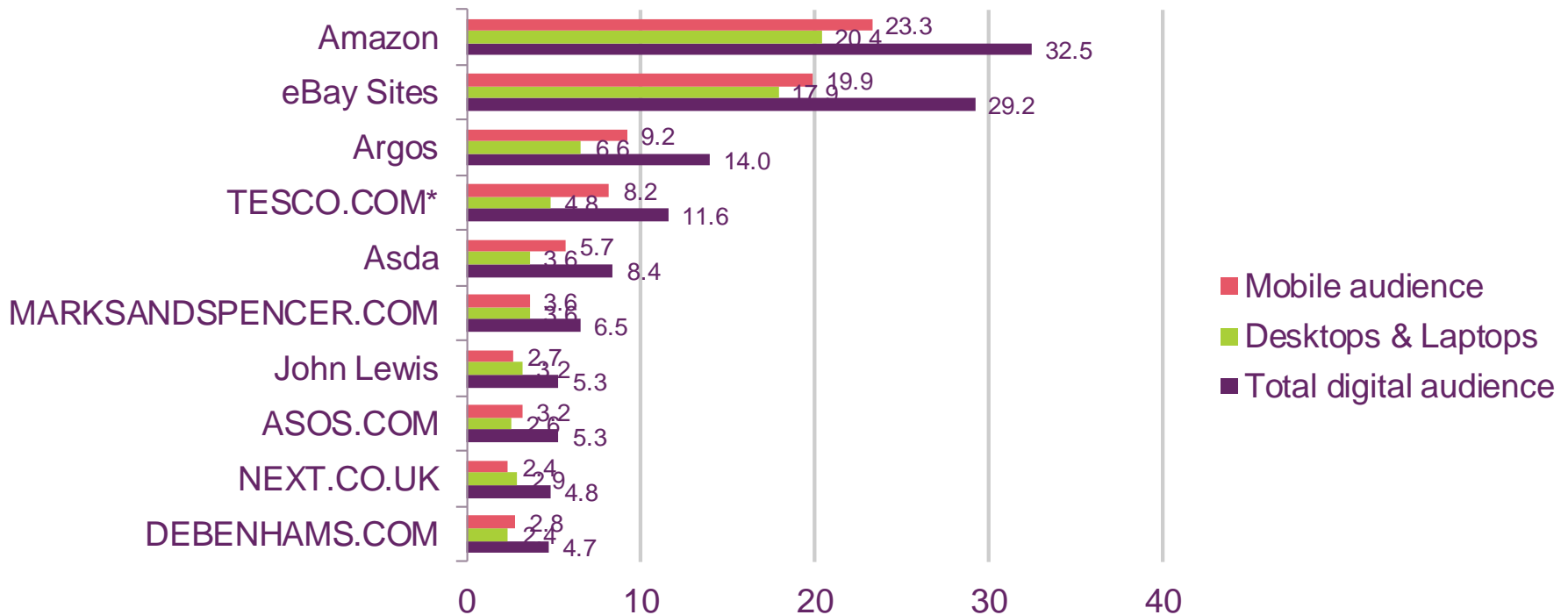
Note: Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. comScore entities used were: [M] YOUTUBE.COM, [P] Vimeo, [P] DAILYMOTION.COM, [M] VINE.CO (w/history), [P] TWITCH.TV, [c] MSN Video (w/history).

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.27

Digital audience of selected online retail services: April 2016

Unique audience (millions)



Source: comScore MMX Multi-Platform, comScore MMX, comScore Mobile Metrix UK, April 2016

Note: MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile use includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data. comScore entities used were: [M] Amazon, [M] eBay sites, [M] Argos, [M] TESCO.COM*, [M] MARKSANDSPENCER.COM, [M] Asda, [M] John Lewis, [M] NEXT.CO.UK, [M](u) ASOS.COM and [M] DEBENHAMS.COM.

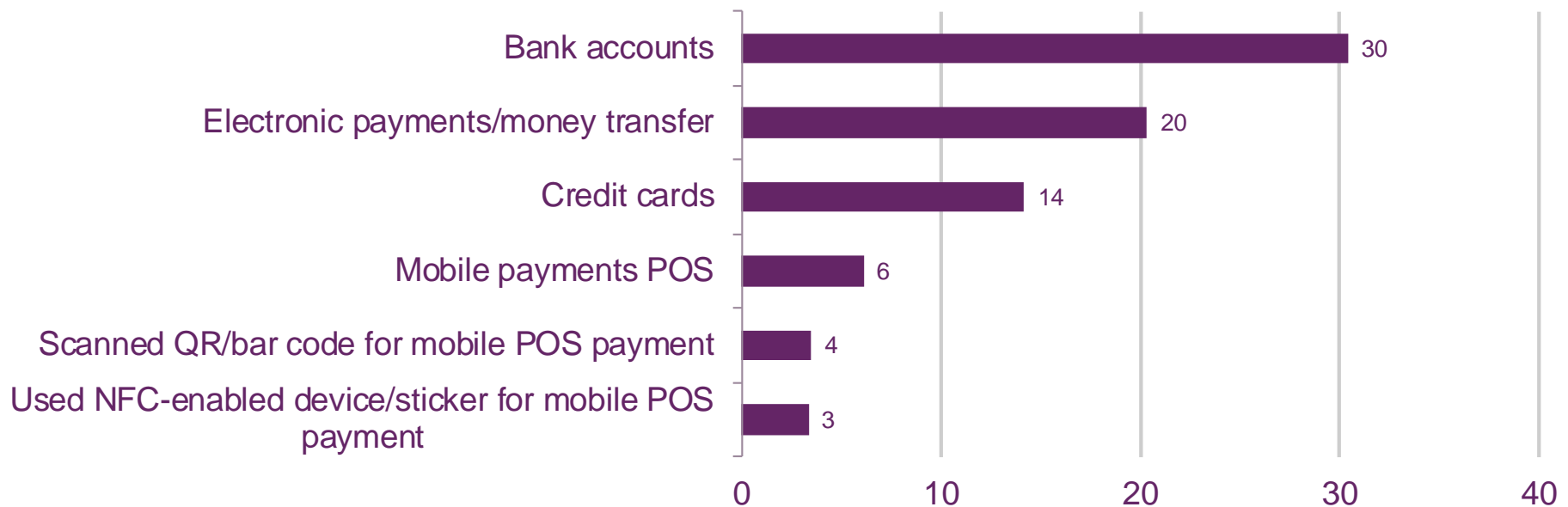
*Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.28

Selected mobile payments and financial services activities conducted by mobile internet users: March 2016

Mobile internet users (%)



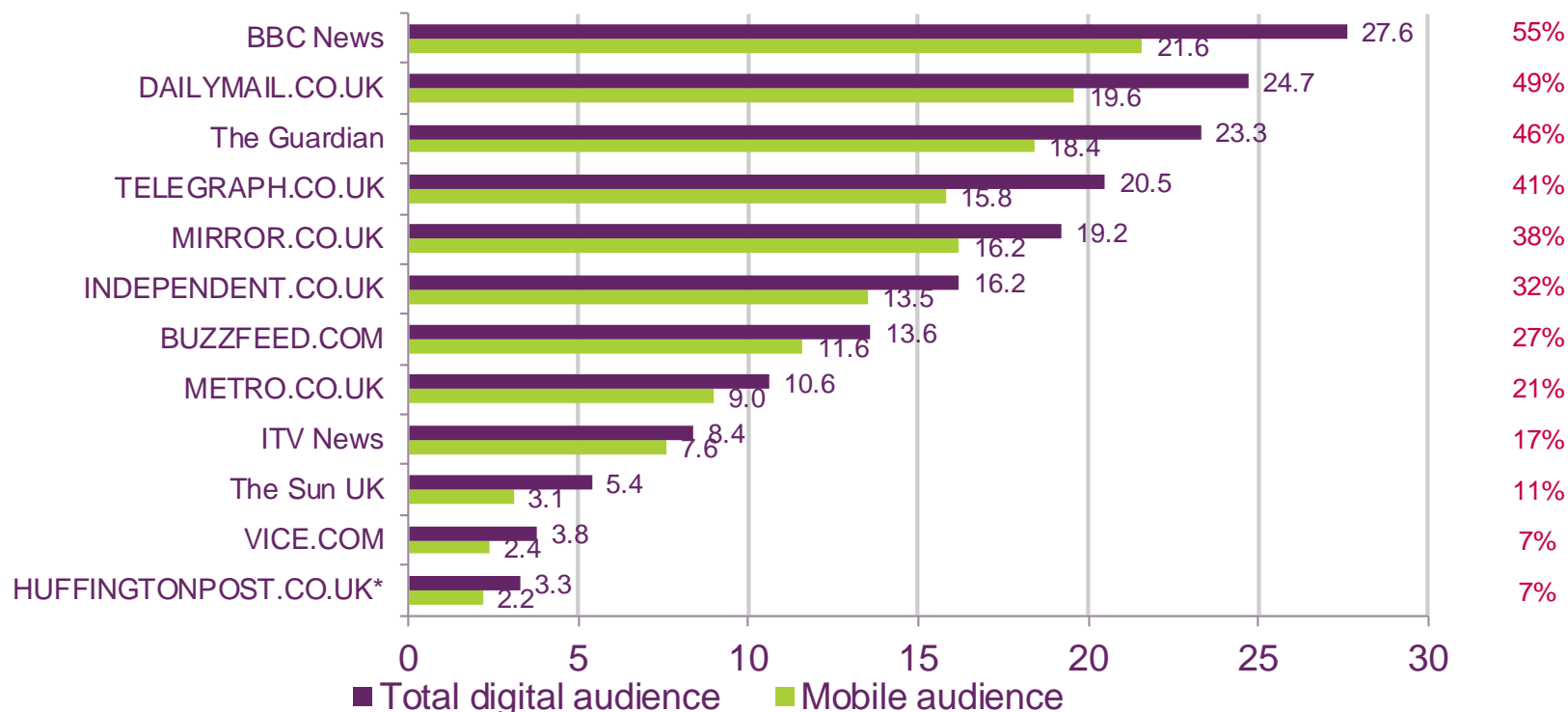
Source: comScore MobiLens Plus, UK, three-month averages ending March 2016

Base: Mobile internet users 13+

Figure 5.29

Unique audience and reach of selected news services: March 2016

Unique audience (millions) / Total active reach (%)



Source: comScore MMX Multi-Platform and Mobile Metrix, UK, March 2016

Note: MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and mobile use. Mobile includes Android smartphones and iOS smartphones and tablets. Only those entities that have been tagged as part of the census network report Android tablet usage data.

comScore entities used were: [C] BBC News, [M] DAILYMAIL.CO.UK, [P] The Guardian, [C] MIRROR.CO.UK, [M] TELEGRAPH.CO.UK, [M] INDEPENDENT.CO.UK, [P] BUZZFEED.COM, [M] METRO.CO.UK, [M] ITV News, [C] The Sun UK, [M] VICE.COM, [C] HUFFINGTONPOST.CO.UK*

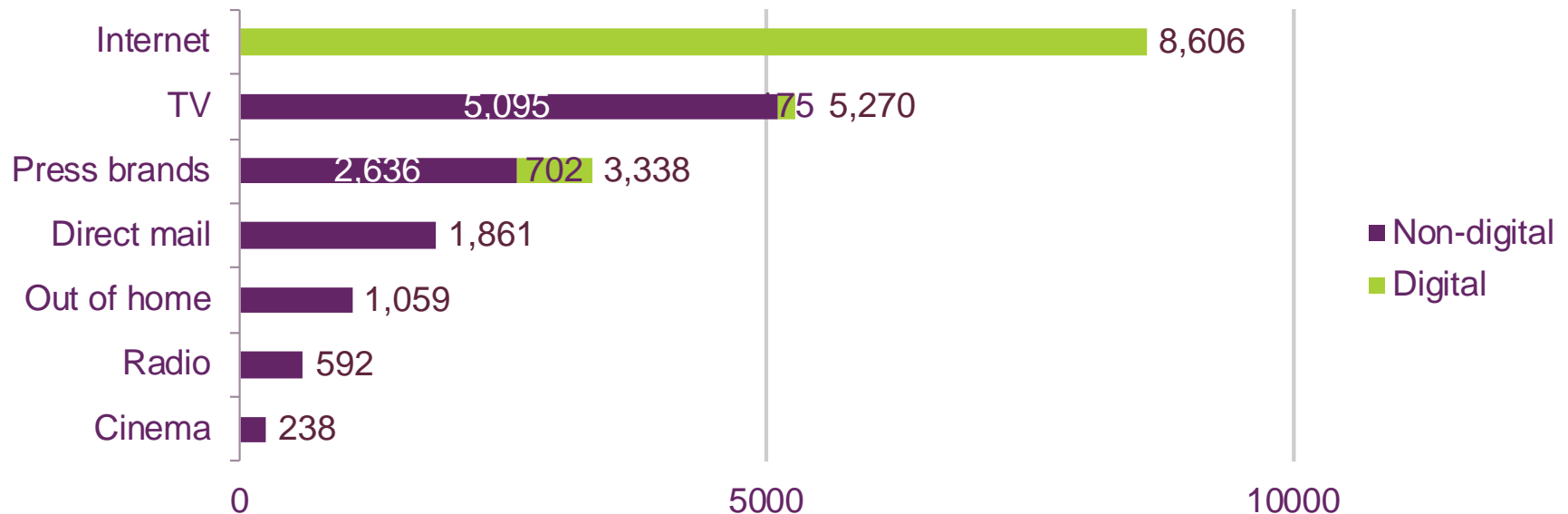
*Indicates that the entity has assigned traffic to certain pages in the domain to other entities

Note: Changes were made to comScore Mobile Metrix methodology in January 2016. comScore entities were affected to varying degrees.

Figure 5.30

UK advertising expenditure: 2015

Expenditure (£ millions)



Source: AA/WARC Expenditure Report, April 2016

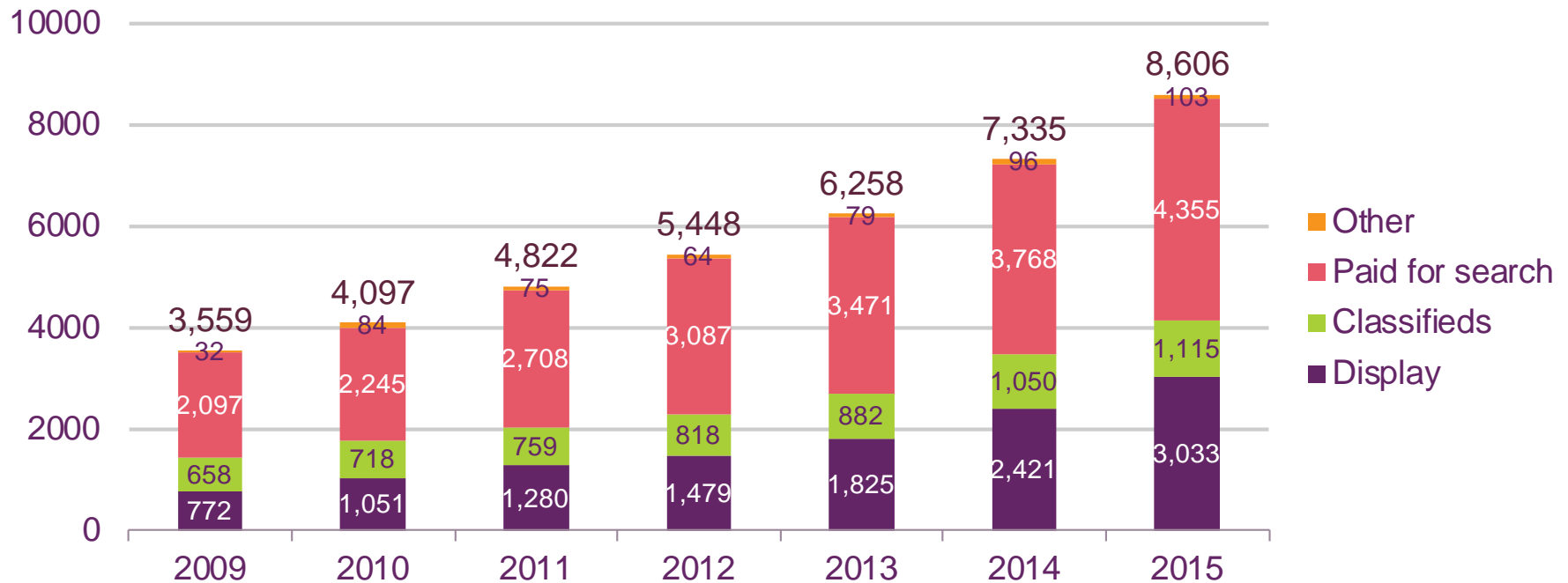
Note: 'Press brands' is a consolidation of magazine brands and national and regional news brands. Total digital advertising spend is double-counted in digital TV spend (broadcaster VOD revenue), and in 'press brands' digital spend.

Note: The AA/WARC data are net of discounts, and includes agency commission, but excludes production costs.

Figure 5.31

Digital advertising expenditure by type: 2009 - 2015

Expenditure (£ millions)

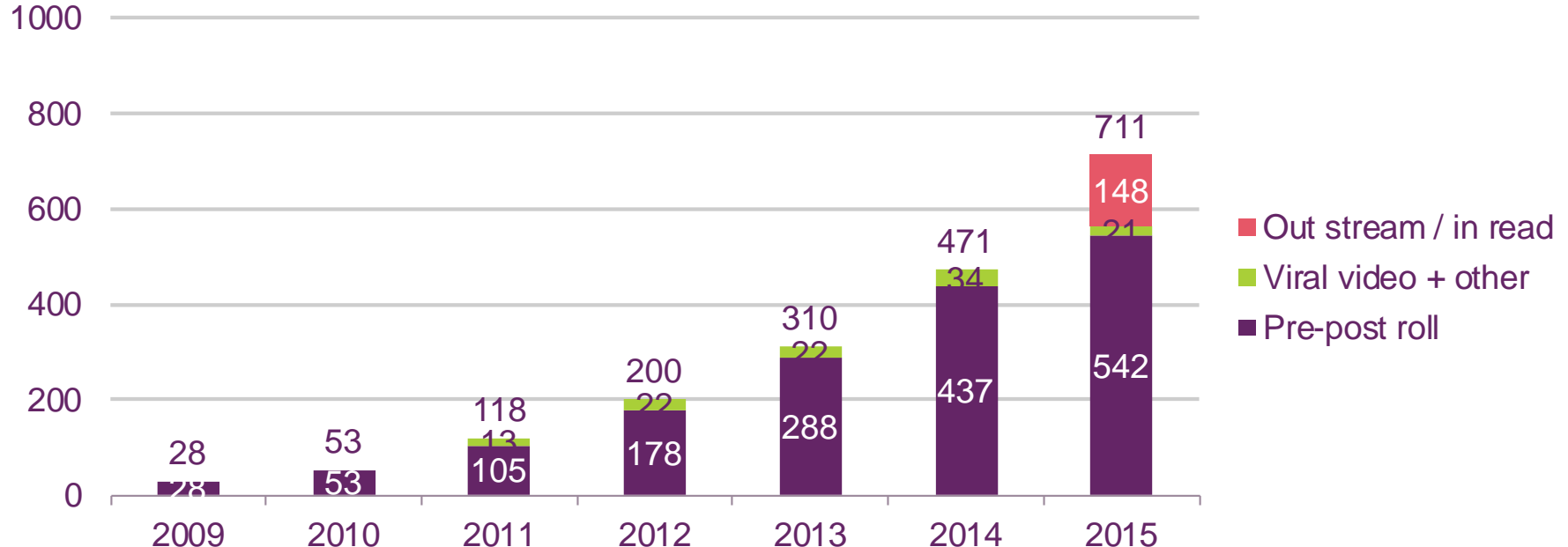


Source: IAB / PwC Digital Adspend 2009 - 2015

Figure 5.32

Digital display video advertising revenue: 2009 - 2015

£ millions



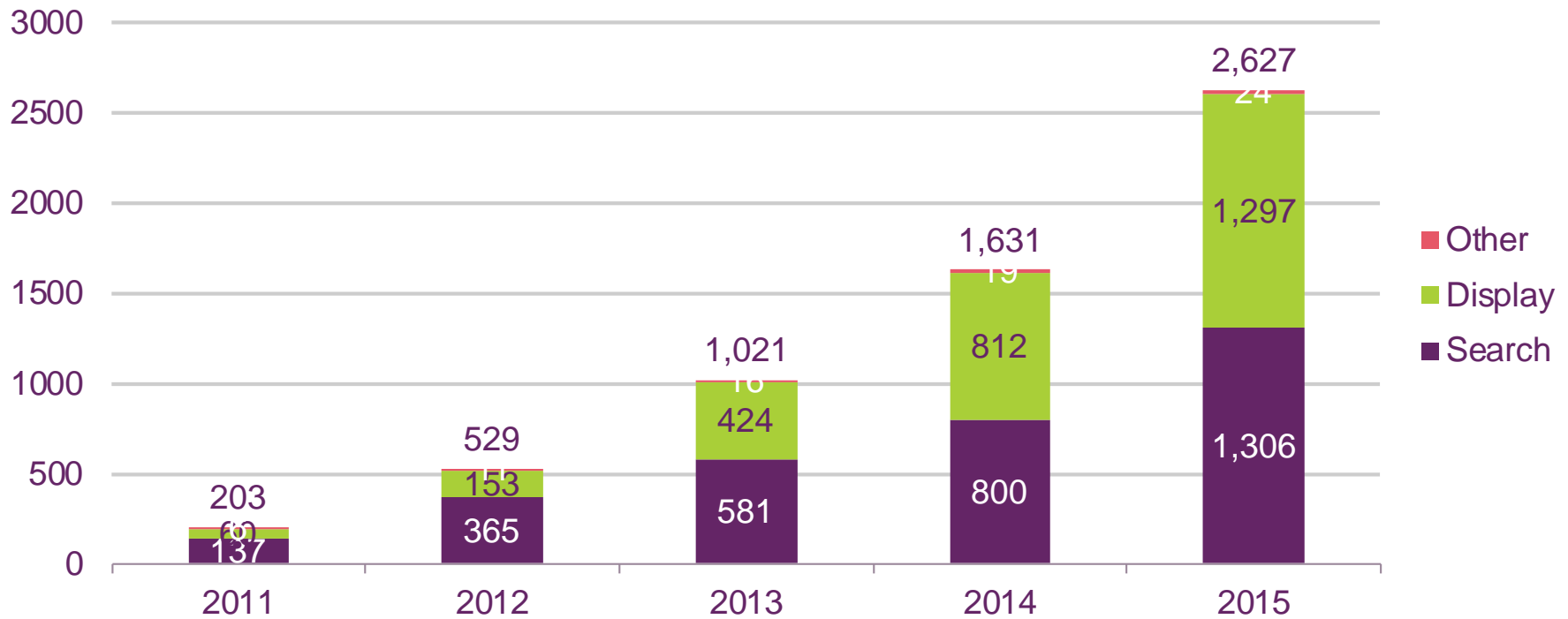
Source: IAB / PwC Digital Adspend 2009 -2015

Note: 'Viral video' was originally named 'social video'. It was changed to 'viral video' in 2015 to avoid confusion with video hosted on social media sites. It was also combined with 'other' video in 2015. 'Out stream / in-read video' is a new category for 2015, which includes video advertising on social media sites such as Facebook and Twitter.

Figure 5.33

Mobile advertising expenditure: 2011 - 2015

Expenditure (£ millions)

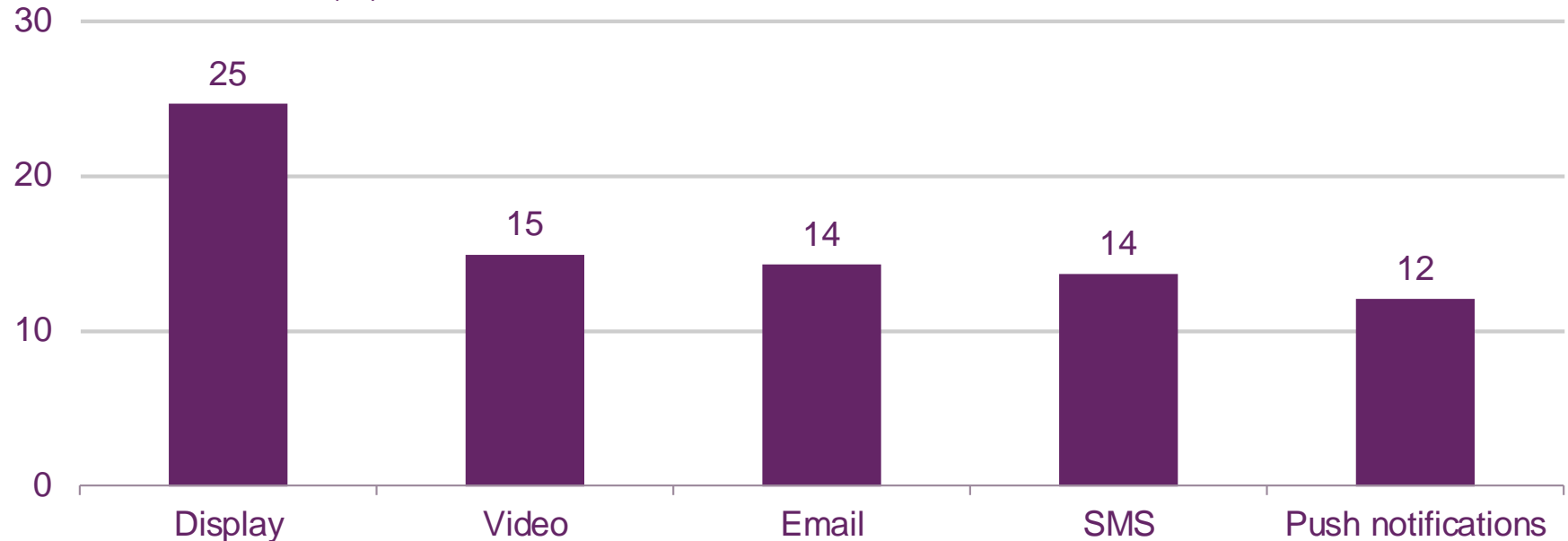


Source: IAB / PwC Digital Adspend 2011 – 2015

Figure 5.34

Type of advertising experienced by mobile internet users: April 2016

Mobile internet users (%)



Source: comScore MobiLens Plus, UK, three-month averages ending April 2016

Base: Mobile internet users 13+