



International Communications Market Report 2015

Research Document

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About this document

This report provides comparative international data on the communications sector. The aim of the report is to benchmark the UK communications sector against a range of comparator countries in order to assess how the UK is performing in an international context. The report compares the availability, take-up and use of services in the UK and 17 comparator countries - France, Germany, Italy, the US, Japan, Australia, Spain, the Netherlands, Sweden, Poland, Singapore, South Korea, Brazil, Russia, India, China and Nigeria, although we focus on a smaller subset of comparator countries for some of our analysis.

This report is intended to be used in a number of ways: to benchmark the UK's communications sector, to learn from market and regulatory developments in other countries, and to provide the context for Ofcom's regulatory initiatives. It also contributes to the richness of the information we draw upon, enabling us to better understand how our actions and priorities can influence outcomes for citizens and consumers, and for communications markets more generally.

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Introduction

This is the tenth year in which Ofcom has published comparative international data on the communications sector. The aim of the report is to benchmark the UK communications sector against a range of comparator countries in order to assess how the UK is performing in an international context.

We are publishing this report as part of our commitment to carry out and publish market and consumer research, including media literacy, as outlined in our 2015/16 Annual Plan¹. This report complements other research published by Ofcom and forms part of the Communications Market Report series, which includes the *UK Communications Market Report* and specific reports for Northern Ireland, Scotland and Wales (all published in August 2015).²

The information set out in this report does not represent any proposal or conclusion by Ofcom in respect of the current or future definition of markets and/or the assessment of licence applications or significant market power or dominant market position for the purposes of the Communications Act 2003, the Competition Act 1998 or other relevant legislation.

Data and methodologies

This report draws on a combination of consumer research data commissioned by Ofcom, data already held by Ofcom, and data sourced from desk or custom research or from third parties, as well as discussions with industry bodies, operators, regulators and commentators.

Consultancy firm IHS provided data that are drawn on mainly for the *TV and audio-visual* and *Telecoms and networks* chapters. IHS has attempted to verify sources and provide market estimates where data are incomplete. Telecoms pricing consultancy Teligen built a bespoke model to enable our analysis of comparative international pricing, and populated it with specifically-sourced tariff data (collected in July 2015).

Among others, we would like to thank the following for their contributions to the data presented in this report: comScore, Deloitte, Ecommerce Europe, Eurodata TV Worldwide, The European Commission, IHS, Kantar Media, PACT, Populus, PricewaterhouseCoopers, The Reuters Institute, Teligen, the World Advertising Research Centre, Wik Consult, WorldDAB and YouGov.

The consumer research undertaken by Ofcom for this report was conducted online with 9,040 consumers in nine countries: the UK, France, Germany, Italy, the US, Japan, Australia, Spain and Sweden. Because the research was undertaken online, samples, and therefore results, may differ from other consumer research conducted by Ofcom, including that published in the *Communications Market Report 2015*, which included face-to-face and telephone interviews. Further information on our online market research methodology is presented in Appendix A.

Comparisons between data in this report and in its predecessors will not always be possible, due to changes in definitions and re-statements over time, the methods of collecting data and the availability of new data sources. For reasons of sampling and definitions, some UK

¹ http://www.ofcom.org.uk/content/about/annual-reports-plans/ann-plans/Annual_Plan_Statement.pdf

² <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15/>

data published in this report may not be directly comparable with data published in other Ofcom reports, such as the *UK Communications Market Report*. We have highlighted incomparability in a number of key instances in this report.

This report is wide in scope, and because of the reliance on third-party data we cannot always fully guarantee the accuracy of data. We have carried out comprehensive checks as far as is reasonably possible and have acted to ensure that the data in this report are comprehensive and the most accurate currently available.

Data in this report generally cover the 2014 calendar year, although other data – notably from Ofcom’s consumer research – are more recent. We show trends using a five-year historical time series wherever possible.

All currency conversions use the average market exchange rate across 2014, as provided by the International Monetary Fund (IMF).³ We have opted to convert data from every year at this fixed rate, so that currency fluctuations do not obscure market trends. The exception to this methodology is in the international price benchmarking analysis, where we have used purchasing power parity-adjusted exchange rates (more detail can be found in Appendix C). All figures in this report are nominal unless otherwise stated.

Structure of the report

The report is divided into seven chapters:

- **The UK in context** provides a broad overview by looking at comparative international communications markets from an industry and a consumer perspective, with an overview of the main regulatory developments in the past year. We also present findings from our consumer research across nine comparator countries, including a look at main sources used for news, online interaction with public services, use of mobile payments and satisfaction and reasons for choosing 4G mobile telecom services.
- **Comparative international pricing** compares the typical prices people pay, across the UK and five other comparator countries, for a range of ‘baskets’ of communications services.
- **Television and audio-visual** considers developments in broadcast and audio-visual services, and includes analysis of the industries and consumer experience in our comparator countries. This section examines patterns of digital television take-up, including the adoption of high-definition television services, digital video recorders, and internet-connected televisions, and looks at the consumption of audio-visual content online.
- **Radio and audio** compares and summarises key data, including revenue figures, for the radio and audio markets across the UK and our comparator countries. We also include some of the findings from our consumer research on the take-up of digital radio sets and the use of audio services online and via mobile devices.
- **Internet and online content** considers how people have adopted the internet to communicate and consume content, and how this differs across our comparator countries. The section takes a high-level look at aspects of internet use, in terms of

³ <http://www.imf.org/external/index.htm>

platforms and devices, as well as content and consumption. We also look at internet advertising markets and e-commerce.

- **Telecoms and networks** examines the major trends in the telecommunications markets, from an industry and operator perspective, in our comparator countries. We also consider the availability and use of telecoms services in the 18 comparator countries. We provide an overview of the industry as a whole, and individual markets in more depth, including analysis of fixed voice, fixed-broadband, mobile voice and data services.
- **Post** considers key data for the postal services markets in the UK and our comparator countries, including trends in addressed mail volume and revenue. We also examine consumer trends in sending and receiving mail, and consumers' perceived reliance on post as a method of communicating.

We include a list of key points for each chapter; these serve as summaries of the main findings.

Key points: The UK in context

- **The communications sector's total global revenues in 2014 were £1,190bn, growing by 1.5% year on year (incorporating the telecoms, television, postal and radio sectors).** Global television industries had the largest increase in revenue in 2014, up by £12bn (5%), to £244bn. Telecommunications revenue, although the largest by a considerable margin, registered slow growth of 0.5% to reach £846bn.
- **UK communications sector revenues were the fifth highest of our comparator countries and the second highest in Europe.** In 2014, as in recent years, the three largest communications markets by revenue were in the US (£316bn), China (£135bn) and Japan (£110bn). Outside the top three, the total UK revenue of £48bn was second only to Germany (£55bn).
- **The UK generated £748 per head across our communications industries in 2014, the highest of the EU5.** This figure was £244 lower than the US, which once again had the highest revenue per head of our comparator countries at £992 per person.
- **Global advertising expenditure grew to £283bn in 2014,** driven by growth in internet and television advertising revenues. Between 2010 and 2014 expenditure on internet advertising grew at a compound annual rate of 17.9%, to stand at £80bn in 2014. Television advertising revenue growth in the year to 2014 was 5.3%, and it remains the largest advertising medium by revenue, at £99bn in 2014.
- **4G mobile population coverage (from at least one operator) increased in most comparator countries in 2014,** with China having the largest year-on-year increase, rising from 1% to 73%. The UK had 84% 4G mobile population coverage at year-end 2014, an increase of 21 percentage points.
- **The UK had the highest proportion of total mobile connections that were 4G, of the EU5 countries in 2014, at 28%.** Among all our comparator countries, South Korea had the highest proportion of mobile connections that were 4G, at 63% of connections, followed by the US (40%), and Australia and Singapore (both 39%).
- **In most comparator countries 'quicker download speed' was the main reason given by respondents for choosing 4G.** In the UK 35% of people either with, or likely to purchase, a 4G service chose it because of quicker download speeds.
- **Around two-thirds (67%) of UK respondents use a smartphone.** This is in line with France, Germany and Australia. Spain and Italy had the highest smartphone take-up, at 83% and 79% of respondents respectively, and the US reported the lowest take-up of our comparator countries, at 57%.
- **UK smartphone owners are the most likely in the EU5 to use their smartphone to pay a bill; 29% claim to have done so.** They are also the most likely in the EU5 to have transferred money on their smartphones (31%).
- **Spain (45%) and the UK (42%) have the highest levels of ownership of connected TVs** (either smart TV sets, or sets connected to the internet via another device, such as a set-top box, video games console, or other internet-enabled device).

- **Nearly two-thirds (66%) of people in the UK had used an online service to watch TV or films within the past week** (increasing to 81% in the past month); the highest proportion across all of the countries surveyed.
- **Around four in ten (44%) UK respondents had used a catch-up service from a free-to-air broadcaster within the past week**, the greatest proportion of any country surveyed.
- **The growth in use of video-on-demand services corresponds with a claimed decrease in viewing traditional TV as well as in watching DVDs and Blu-ray.** The decrease in DVD/Blu-ray viewing is particularly striking; between 28% and 42% of respondents who view TV in the countries surveyed said they were watching DVDs/Blu-rays less than in the previous year. This figure stood at 32% in the UK.
- **Across most of the European countries in our research, around eight in ten online respondents say they use the internet to read news online.** This is lower in the UK (73%), the US (68%) and Australia (69%). In Italy 87% say they use the internet to read news, the highest among all our comparator countries.
- **In the UK, social media was a source of news for 36% of respondents in 2015, up from 23% in 2014.** In Germany (25%) and Japan (21%) levels remain lower. Respondents in Australia are the most likely to use social media for news (51%).
- **Search engines are used most regularly by respondents in Italy (92%), and least regularly by those in the US (73%).** Four in five (82%) people in the UK say they use a search engine at least weekly. Around six in ten respondents in most countries say that, of the websites returned by a search engine, some are likely to be accurate and some are not: a media-literate response. Around a quarter of people in the UK, Germany and the US think that if a search engine has listed a website then it will have accurate information, rising to 35% in Italy and Spain.
- **Levels of concern about providing personal data are relatively high**, with half or more respondents in each country agreeing that they are worried about unwarranted use of their personal data, with the exception of Sweden, where levels of concern are lower (42%). This figure stood at 51% in the UK.

Key points: comparative international pricing

- **In order to compare the prices available to consumers in different countries we examine the cost of different 'baskets' of communications services.** These are based on tariffs available from the largest communications providers in each comparator country.
- **These baskets have been compiled to be representative of five different household types.** These range from a household with basic needs to one with sophisticated requirements.
- **We consider that this basket-based approach is the best way of comparing prices.** This enables us to compare prices and identify trends in complex markets where consumers often buy services in bundles, where services are often discounted and where installation and hardware are often included as part of the service.
- **Overall, UK communications service prices compare favourably to those in the rest of the EU5 countries and the US.** The UK ranked second in the overall pricing rank (combining stand-alone, bundled and 'lowest available' prices) in 2015, behind France. This was a fall of one place compared to 2014.
- **The UK's average performance across all baskets and metrics was unchanged since 2014.** While the UK's overall rank fell in 2015, its average rank across all of the baskets and metrics used in the analysis was unchanged. In contrast, France's average rank improved, resulting in it overtaking the UK in terms of its overall rank.
- **The UK was cheapest in terms of stand-alone pricing (i.e. when services are not purchased in a bundle).** The UK had the lowest 'weighted average' stand-alone prices for three of the five household usage profiles included in the analysis in 2015.
- **The cheapest stand-alone fixed broadband and mobile phone prices were both found in the UK in 2015.** UK fixed broadband prices fell slightly during the year, and the UK had the cheapest mobile prices in 2015, despite prices having increased.
- **France overtook the UK in terms of lowest bundled service pricing in 2015.** France had the lowest 'weighted average' bundled service prices for three of our household usage profiles, with the UK having the 'lowest available' price for one household.
- **In almost all cases, it was cheaper to purchase a bundle where the household required fixed broadband.** In the UK, the average saving associated with buying a bundle rather than stand-alone services was 18% across the three households that include fixed broadband; the third-lowest proportion among our six countries.
- **The UK performed less well in terms of fixed voice prices.** The cheapest available landline services for our households' requirements were the most expensive among the six countries included in the analysis in 2015, following an increase in prices during the year.
- **The UK improved its ranking in terms of the 'lowest available' prices in 2015.** During the year, the UK overtook Italy to rank second after France, which offered the 'lowest available' prices for two of the five household usage profiles used in the analysis in 2015 (as did the UK).

Key points: TV and audio-visual

- **Global TV revenues (including broadcast advertising, channel subscription and public licence fees only) increased by 5% in 2014 to reach £244bn.** Subscription revenues continue to be the key driver of this growth, rising by 5.4% to reach £125bn, just over half of total revenue. Advertising revenue grew 5.3% (or £5bn) while income from public funding grew at a more modest 1.7% in 2014.
- **The total year-on-year growth of the European comparator countries was 2.3% in 2014, resulting in revenues of £58.3bn.** This was the lowest growth of the four regions included in our analysis, with the BRIC nations (and Nigeria) increasing by 11.3%, the US by 4.1% and the Asia-Pacific countries by 3.3% in 2014.
- **TV revenues in the UK increased by 4.0% year on year; from £13.4bn in 2013 to £14bn in 2014.** Following three consecutive years of decline, Spain recorded the largest annual growth in TV revenues among the European comparator countries in 2014 (9.1%), driven by stronger TV advertising revenues.
- **Revenues from both short and long-form online TV and video in the UK continued to grow, up by £278m to £908m in 2014.** However, the US remains the largest online TV and video market among our comparator countries; between 2009 and 2014, online TV and video revenue grew from £1.3bn to £6.8bn.
- **In 2014, the UK, Italy, Japan, Australia and Singapore had 100% digital television take-up on main TV sets,** with digital take-up exceeding 60% of TV homes in every comparator country for the first time.
- **In the UK, digital satellite (including Freesat) was the country's most popular viewing platform on primary sets in 2014,** (at 45% of TV households) followed by digital terrestrial at 33%.
- **IPTV was the most popular TV platform in France and South Korea in 2014, with take-up of 41% and 30% respectively.** The proportion of UK TV homes with IPTV as their main platform increased by 3pp in 2014 to 8%.
- **Nearly three-fifths (59%) of TV homes in the UK had a pay-TV service in 2014.** The strongest growth in pay-TV take-up was in the developing markets, with 66% of TV households in the BRIC countries having a subscription in 2014, compared to 48% in 2009.
- **Across the comparator countries, audiences watched an average of 3 hours 43 minutes of broadcast TV per person per day in 2014.** Seven of the 15 comparator countries had a year-on-year decline in daily TV viewing minutes per head. The UK had the largest proportional decline, down by 4.9% (11 minutes) to 3 hours 40 minutes. Some of the UK decline may be explained by: increased viewing of online TV content on tablets and smartphones, an increase in SVoD viewing, falling unemployment and the effect of the weather.⁴

⁴ For an in-depth look at the recent decline in TV set viewing in the UK see section 1.4 *Changes in TV viewing habits* in Ofcom's *Communications Market Report 2015*:

http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr15/CMR_UK_2015.pdf

Key points: radio and audio

- **Worldwide radio revenue grew by 3.9% in 2014 to reach £28.1bn.** Revenues have increased each year since 2010. The 18 comparator countries that we study in this report account for the majority of worldwide radio revenue (£22.9bn), which increased by 3.5% in 2014.
- **Revenue growth was due to an increase in all three types of revenue.**⁵ The largest absolute increase in revenue was in the US, where advertising and subscription revenues contributed to a combined growth of £412.3m. In the UK, revenue grew by £42.3m, a 3.6% year-on-year growth. This was due to an increase in national advertising revenue as well as BBC expenditure on radio.
- **The only two of our comparator countries where revenue declined were Japan and Italy.** In Japan, there was a decline of £17.1m, a 2.4% proportional decrease on the 2013 figure, while in Italy revenue decreased by £5.5m, a 1.5% decrease year on year. These declines were mainly due to decreases in advertising revenue.
- **Public radio licence fees contributed the largest proportion of revenues in Germany, Sweden and the UK.** Germany had the highest public funding ratio, with 79% of revenue coming from public radio licence fees. Sweden followed closely with 78%, and in the UK 60% of radio revenues came from public radio licence fees.
- **Digital radio set take-up in the UK was the highest of all surveyed comparator countries in 2015,** at 50% of radio listeners. This is a rise of 9 percentage points from 2014. DAB coverage is also highest in the UK, reaching 96% of households.
- **The UK had one of the largest proportions of digital broadcast stations among the comparator countries.** The 283 digital radio stations in the UK in 2014 represent 33% of all radio stations. Of all the comparator countries in 2014, this proportion is second only to Germany (37%).
- **FM-only radios are the most common type of set owned by radio listeners in all of our comparator countries.** Take-up of FM-only radios was highest in Italy and Spain (84%). The UK had the lowest take-up of FM-only radio sets (60%), although most radio sets with DAB or internet connectivity include an FM tuner.
- **In 2014, the proportion of households listening to radio on a weekly basis was lowest in Nigeria (20%) and Japan (38%), and highest in China (98%), Sweden and Poland (both at 94%).** The lowest reach of radio in Europe was in Germany (68%), while in the UK the reach of radio was 90% of households in 2014.
- **A quarter (25%) of mobile phone users in the UK use their device to listen to music on a weekly basis.** This is second only to the US, where a third (33%) of mobile phone users listen to music on their devices.
- **Between 2013 and 2015 there was an increase in the use of streaming audio services among mobile phone owners,** with around three in ten mobile phone owners using their device in this way in Italy (33%) and the US (31%).

⁵ Radio advertising, public licence fees and satellite radio subscriptions

Key points: telecoms and networks

- **Total comparator country retail telecoms revenues increased by 0.7% in 2014.** These revenues (which include those generated by fixed voice, fixed broadband, mobile voice and mobile data services) increased by £4bn to £589bn during the year, mainly as a result of increasing use of fixed broadband and mobile data services.
- **The UK had the highest number of fixed voice connections per 100 people of all the comparator countries at the end of 2014.** During the year, the number of UK connections per 100 people increased by one, to 61. This represented the highest penetration among our 18 countries and the largest increase during the year.
- **The UK had the highest proportion of fixed broadband lines that were superfast products among the EU5 countries at the end of 2014.** Over a third of UK fixed broadband connections (35%) had an advertised speed ≥ 30 Mbit/s at the end of 2014, the eighth-highest proportion among our comparator countries and higher than in any of the other EU5 countries.
- **The Netherlands had the highest fixed broadband penetration among our comparator countries at the end of 2014,** with 41 fixed broadband connections per 100 population at the end of 2014. By comparison, the UK had 37 connections per 100 population, the fifth highest number among all 18 of our comparator countries.
- **The Netherlands also had the highest proportion of fixed voice connections provided over managed VoIP in 2014.** Managed VoIP connections made up over three-quarters (76%) of total voice connections in the Netherlands at the end of the year. In the UK managed VoIP accounted for 14% of all fixed voice connections, the second-lowest proportion among our EU5 countries.
- **A quarter of UK adults said that they used over-the-top VoIP at least once a week in 2015.** The UK had the second highest level of regular over-the-top (OTT) VoIP use among our comparator countries after Italy, with 25% of respondents saying that they used any OTT VoIP service at least one a week. Twenty-one per cent of UK consumers said that they used OTT video VoIP at least once a week, while 18% said they used OTT voice VoIP services regularly.
- **Total comparator country mobile internet revenues increased by 6.6% in 2014.** Mobile internet revenues (which exclude messaging revenues) continued to grow in 2014, increasing by £11bn to £173bn. This was largely the result of increasing mobile data volumes, which grew by 76% to 16 exabytes during the year.
- **Take-up of mobile internet (excluding messaging) services was highest in Singapore in 2014.** There were 183 mobile internet connections per 100 people (including dedicated mobile internet connections and access on mobile handsets) in Singapore at the end of 2014. By comparison, the UK had 87 connections per 100 people in 2014, the eighth highest proportion among our comparator countries.
- **More than eight in ten UK fixed broadband users were satisfied with their service in 2015.** In the UK, 82% of users were satisfied with their overall fixed broadband service, the highest proportion among our comparator countries. UK satisfaction levels with download speeds (77%), upload speeds (76%) and connection speed/quality with multiple devices (75%) were also the highest among our comparator countries.

Key points: internet and online content

- **The UK and China have the greatest share of all advertising expenditure on the internet; 43% of all spending on advertising was online in 2014.** However, year-on-year growth was higher in China (9%) than in the UK (3%).
- **Mobile internet advertising spend was greatest in the UK, at almost £25 per head,** followed by £23.69 in the US and £17.66 in Australia. All comparator countries experienced year-on-year growth in mobile internet advertising spend, in contrast to fixed spend which declined in the US, Japan, Australia and Spain.
- **The UK had the highest per-capita spend on e-commerce in 2014, at £1591 per head.** E-commerce expenditure per head in the UK was over 50% higher than in the US, the next highest-valued market, which had an average spend of £918 per head.
- **Over a third of smartphone users in the UK shop online once a week or more.** In the UK, over a third (34%) of smartphone owners claimed to use their device to shop online, at least weekly or more often. Online shopping with a smartphone at least weekly was most common in the US, where 38% claimed to do this.
- **Social networking, instant messaging and gaming apps are the most commonly downloaded apps on iPhone and Google Play, across comparator countries.** On iPhone, WhatsApp Messenger was the most downloaded app in Spain, Singapore, Brazil, India and Nigeria. On Google Play, Facebook was the most downloaded app in the UK, France, Germany, Australia, Poland and Nigeria. On both iPhone and Google Play, at least one gaming app featured in 12 countries' top five most downloaded apps.
- **UK tablet users spend nearly 32 hours per month browsing.** In the UK, tablet users spent an average of nearly 32 hours browsing the internet in August 2015. This was slightly exceeded by US tablet users, who spent over 23 minutes longer browsing in the same month.
- **Laptop and desktop active audiences are getting older in the comparator countries.** In the majority of comparator countries analysed, the proportion of laptop and desktop users aged over 55 increased from 2014 to 2015. The highest proportion of over-55 laptop and desktop users was in Australia, at 30%, and in the UK over-55s accounted for a quarter of users.
- **US internet users spend the most time browsing online on a laptop or desktop, at 34 hours per month, followed by the UK, at 33 hours per month.** The least time spent browsing was in Japan, at 18 hours per month.
- **Google is the most popular search engine across all of the comparator countries.** In 2014, Google was the most popular search engine across all comparator countries except Japan. As Yahoo! Search's active reach in Japan declined substantially year on year to August 2015, Google became the most popular search engine.

Key points: post

- **Letter mail volumes across our comparator countries have declined by 10.2% since 2010.** Volumes have fallen from a total of 309.7 billion items in 2010 to 278.2 billion items in 2014. Year on year, total volumes fell by 2.5%. The rate of decline was faster among our European comparators (4.0%).
- **Year on year, letter mail revenues across all our comparators increased by 0.7%.** Revenue across all our comparator countries increased from £71.6bn in 2013 to £72.1bn in 2014. Revenue grew across all our country groups, with the exception of the European comparators, where it fell by 2.3%.
- **Volume decline year on year in the UK was among the lowest of our comparators.** Mail volume in the UK fell by 1.5% in 2014, the slowest rate of decline among our European comparators.
- **The UK was the only country among our European comparators in which revenue did not decline in 2014.** Letter revenue in the UK grew slightly in 2014, increasing by 0.4% year on year. Losses in revenue for our European comparators were more pronounced, particularly in Italy and Spain, where declines in volume contributed to revenue losses of 8.2% and 6.8% respectively.
- **The UK is among the cheapest countries in Europe in which to send a medium-sized letter.** It costs 63p to send a First Class medium-sized (C5 size, 100g or less) letter in the UK. The only European country in which this is cheaper is Poland (45p). With the exception of Spain, it costs over £1 to send a medium-sized letter in all of our other European comparators.
- **Seven in ten (72%) of the online population in the UK had sent an item of post in the past month.** Only in France and in Germany, where nearly eight in ten had sent at least one item, were people more likely to have sent something by post in the past month.
- **The average number of items of post sent per month has remained broadly stable in the UK and has increased in France, Italy and the US.** The average number of items sent per month in 2015 in the UK was 4.2, broadly similar to the average of 3.9 for the previous year. This is lower than in 2013, when the average number of items sent was 4.7.
- **People in the UK are more likely than those in any of the other countries we surveyed to send invitations, cards and postcards.** One-third of those in the UK who had sent any item of post in the past month had sent an invitation, card or postcard in this period, higher than any of the other countries that we researched.
- **People in the US reported receiving the most parcels in the past week.** Among people who had received a parcel in the past week, those in the US reported receiving the most parcels (3.6 on average). The average for the UK was 1.9 parcels.

Key summary metrics: 2014 data

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA	
TV and audio-visual	TV industry revenue (£bn)	14.0	8.4	20.4	6.1	102.9	19.1	4.1	3.1	2.5	1.8	2.1	0.6	5.5	11.4	3.6	5.1	21.9	0.6
	Revenue change (% YOY)	4.0	0.4	2.9	-2.3	4.1	3.1	-0.3	9.1	-2.2	1.9	5.1	0.6	7.2	12.2	7.4	14.7	10.7	14.8
	TV industry revenue per capita (£)	216.4	130.4	247.4	100.2	322.6	150.2	174.3	65.9	146.5	184.3	55.7	101.9	111.7	56.5	25.1	4.0	16.0	3.2
	Largest TV platform	Dsat	IPTV	Dsat	DTT	Dcab	Dcab	DTT	DTT	Dcab	Acab	Dsat	DTT	IPTV	Dsat	Dsat	Dsat	Dcab	Dsat
	Largest TV platform (% of homes)	45	41	43	73	43	50	67	69	47	26	50	37	30	52	36	42	43	69
	TV viewing (min/day)	220.0	221.0	221.0	262.0	282.0	264.0	204.0	239.0	200.0	153.0	260.0	n/a	196.0	224.0	239.0	n/a	157.0	n/a
	DTV take-up (%)	100	95	72	100	96	100	100	99	87	74	86	100	76	72	65	70	84	84
	Pay TV take-up (%)	59	77	55	30	87	69	32	29	99	83	83	63	97	33	66	85	62	22
Radio and audio	Radio industry revenue (£bn)	1.2	1.1	3.0	0.4	12.5	0.7	0.6	0.3	0.3	0.3	0.1	0.1	0.2	0.3	0.3	0.2	1.3	0.1
	Revenue change (% YOY)	3.6%	1.9%	3.4%	-1.5%	3.4%	-2.4%	3.1%	1.9%	1.3%	5.7%	0.4%	4.0%	2.8%	4.3%	7.0%	14.0%	9.8%	4.5%
	Radio industry revenue per capita (£)	18.7	16.7	36.4	5.9	39.3	5.5	26.3	7.4	16.0	29.4	2.7	16.0	3.1	1.6	2.0	0.2	1.0	0.3
	% income from public licence fees	60.0%	38.9%	79.3%	23.5%	n/a	5.2%	n/a	n/a	30.6%	78.1%	6.5%	n/a	22.3%	n/a	n/a	n/a	n/a	n/a
Internet	Online universe (m)	39.8	37.0	51.2	26.5	204.0	73.7	16.0	21.5	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
	Fixed broadband connections per 100 HH	89	92	72	55	77	93	75	75	90	69	59	121	107	35	48	6	n/a	0
	Internet access via a smartphone/ mobile phone (%)	61	59	62	82	53	60	64	83	n/a	69	n/a	n/a	n/a	n/a	n/a	n/a	79	n/a
Telecoms and networks	Telecoms service revenues (£bn)	28.7	19.5	24.5	15.8	171.5	79.5	15.1	13.8	6.8	4.2	6.2	3.2	19.7	29.6	18.9	15.4	110.4	6.2
	Monthly telecoms revenues per capita (£)	37.2	25.4	24.8	21.5	45.0	52.0	53.5	24.4	33.7	36.1	13.5	49.1	33.3	12.3	11.0	1.0	6.7	2.9
	Fixed voice connections per 100 population (inc. managed VoIP)	60.8	60.5	44.8	36.7	41.0	44.5	38.0	40.4	41.5	39.2	16.2	36.2	53.9	22.5	26.6	2.1	19.2	0.1
	Monthly outbound fixed minutes per capita population	131.0	119.0	156.1	76.9	111.7	82.7	120.8	78.9	90.1	100.0	22.7	79.8	99.3	67.0	81.0	4.2	8.2	0.1
	Monthly outbound mobile minutes per capita	178.0	191.3	112.5	226.3	315.3	131.6	161.0	140.9	128.5	230.9	180.1	257.2	208.8	181.2	308.6	132.8	178.8	62.1
	Fixed broadband connections per 100 population	36.8	40.5	35.3	22.9	30.1	38.6	29.2	27.7	40.9	33.6	21.4	33.0	39.2	10.5	19.1	1.4	18.4	0.0
	4G as % of all mobile connections	28.2	13.8	11.5	4.3	39.5	36.8	38.9	12.6	18.9	27.5	7.4	39.3	62.9	2.4	4.7	0.0	7.5	0.2
	Domestic addressed mail revenues (£bn)	4.3	6.7	6.9	2.6	28.9	10.5	1.2	1.1	2.0	1.0	0.7	0.1	1.6	2.1	0.6	0.4	1.6	n/a
Mail revenues per capita (£)	66.0	103.9	83.3	42.0	90.6	82.3	52.3	22.7	118.6	104.6	17.2	21.6	33.2	10.3	3.9	0.3	1.2	n/a	
Domestic mail volumes (bn items)	12.7	13.6	15.7	3.8	150.2	18.1	4.3	3.6	3.5	2.4	1.8	0.6	4.3	8.3	3.1	5.6	26.7	n/a	
Standard (C5) domestic stamp price (£)	0.63	1.53	1.17	1.94	0.98	0.80	0.77	0.74	1.67	1.24	0.45	0.29	n/a	0.48	0.79	0.25	0.59	n/a	