



# The Communications Market 2013

## **4 Internet and web-based content**

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## 4.1 Key market developments in internet and web-based content

### 4.1.1 Introduction

Figure 4.1 UK internet and web-based content market: key statistics

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

Source: <sup>1</sup>Ofcom consumer research, Q1 each year, <sup>2</sup>comScore MMX, UK, annual average from reported monthly values; <sup>3</sup>Internet Advertising Bureau/PwC.

Note: Change in comScore methodology effects values from February 2011 onwards.

The internet is at the heart of how many people communicate, find information and seek entertainment. And more and more devices are becoming internet-enabled. As a result it is becoming increasingly difficult to separate the use of internet services from conventional television, radio and voice communication services – they can all be provided by the same device.

The internet allows existing forms of content, such as TV-like programming and radio, to be consumed in new ways (for example: on demand, or interactively). Other chapters in this report consider content delivered via the internet in the context of television and other audio-visual content (section 2) and radio and audio content (chapter 3.3.5).

The internet has also allowed new internet-only content types, and new ways of communication, to emerge: social networking sites, user-generated content, and online shopping services. This section of the report considers how these are transforming the ways in which people communicate and seek information and entertainment.

This chapter is split into three sub-sections:

In the first section, **key market developments**, we examine two themes which are central to the transformative effect of the internet on consumer behaviour and industry structures.

- **The continued rise of the mobile internet.** Take-up of the mobile internet has risen to 49%, and more than half of UK adults own a smartphone. We examine how take-up has changed by demographic over time, and which websites are most popular on the mobile web.
- **Mobile internet advertising drives digital advertising growth.** Digital advertising spend grew to £5.4bn in 2012, up £623m on 2011. More than half of this growth can be attributed to mobile advertising, which grew by 148%. We look at the growth of different digital advertising sectors and examine the profile of those who recall mobile advertising.

The second sub-section looks at the **internet and the devices** used to access it. We explore internet access in detail; from delivery platform, through the devices used, to the user. We examine how access has changed over time, how it differs between different groups in society, and why some groups do not use the internet at all.

Finally, we provide an overview of the **consumption of web-based content** in which we examine:

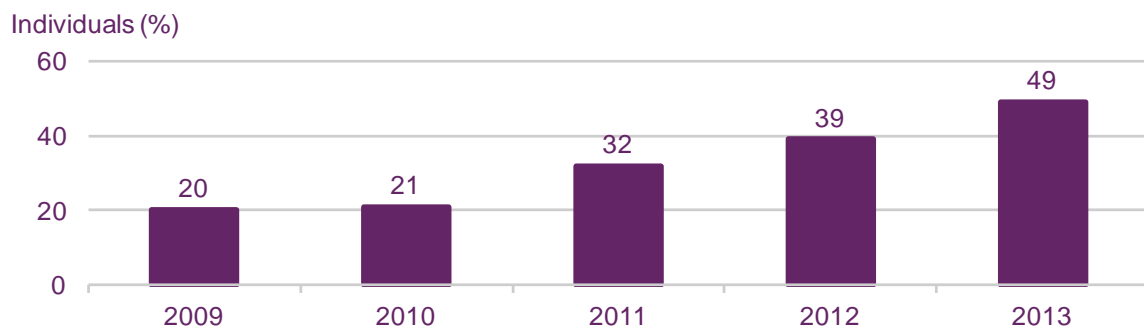
- the most popular online services and websites; and
- consumer behaviours unique to the internet, such as social networking and online shopping.
- the different consumption patterns between laptop/desktop computer users and mobile users.

### 4.1.2 The continued rise of the mobile internet

#### Half of all UK adults now access the internet on their mobile phone

The proportion of UK adults who use their mobile phone to access the internet rose to 49% in Q1 2013, a ten percentage point increase on Q1 2012. Take-up of the mobile internet has risen consistently since 2010, when just a fifth of UK adults used their handset to access the internet.

**Figure 4.2 Take-up of mobile phone internet access**



Source: Ofcom research, data as at Q1 of each year

Base: All adults aged 16+

## The mobile internet

We define the mobile internet as that which a mobile internet user experiences through their mobile phone. This can be through the mobile phone's browser or through a mobile application ('app'). In this report we measure the mobile internet in two ways: by analysing web-page metrics from comScore GSMA MMM, and through consumer research by Ofcom and from comScore MobiLens. The two comScore sources capture two different aspects of the mobile internet.

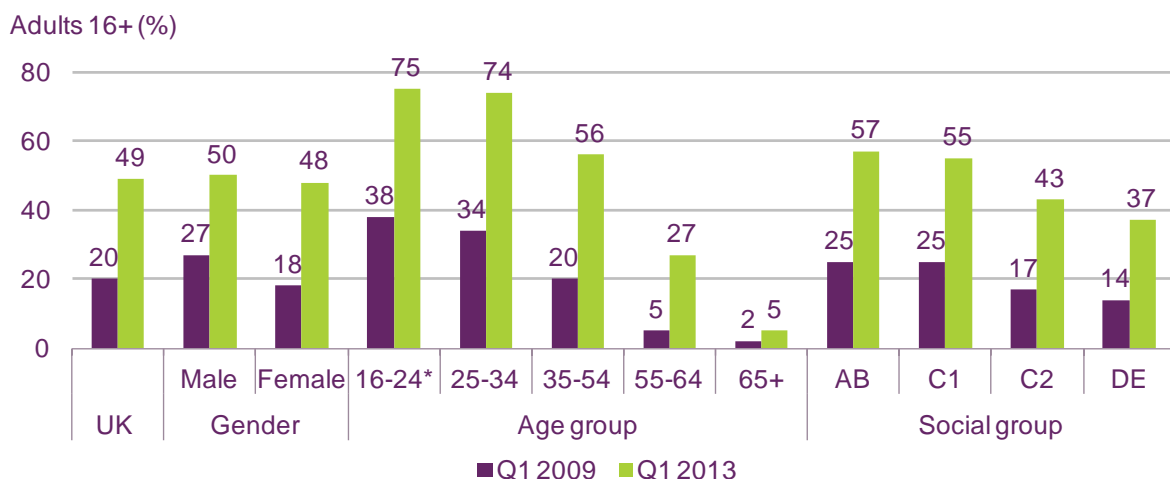
We use comScore GSMA MMM to provide data on visits to websites using the mobile browser, when mobile users are connected to the internet through their cellular connection. Since we use GSMA MMM to capture only mobile browser traffic, the data exclude mobile internet consumption through mobile apps.

comScore MobiLens provides data on mobile users' mobile ownership, behaviours and brand use. As MobiLens is survey based, it relies on consumers' recall of mobile activity, and does not distinguish between mobile internet activity through cellular and through WiFi connections. We use MobiLens to identify mobile consumer behaviour and to understand brand reach, both through the mobile browser and through mobile apps.

### Mobile internet access has increased five-fold among those aged 55-64 in four years

Mobile internet access grew by 145% in the UK between Q1 2009 and Q1 2013. However, growth across gender, age and social groups has not been consistent, and the mobile internet users of 2013 are a different mix of people than they were four years ago. In 2009, accessing the internet on a mobile phone was an activity most common among men (27%), those aged 16-24 (38%), and the AB and C1 social groups (25%). While this remains the case for these ages and social groups in 2013, mobile internet access among women (48%) is now on a par with men (50%) and growth among older age groups, and the C2 and DE social groups, is greater than the UK average. The largest rise in mobile internet take-up has been among those aged 25-34, up 40 percentage points from Q1 2009 to Q1 2013, but the fastest growth was among those aged 55-64, growing more than five-fold in four years.

**Figure 4.3 Mobile internet users by gender, age, and social group: 2009 vs. 2013**



Source: Ofcom consumer research Q1 2009 and Q1 2013

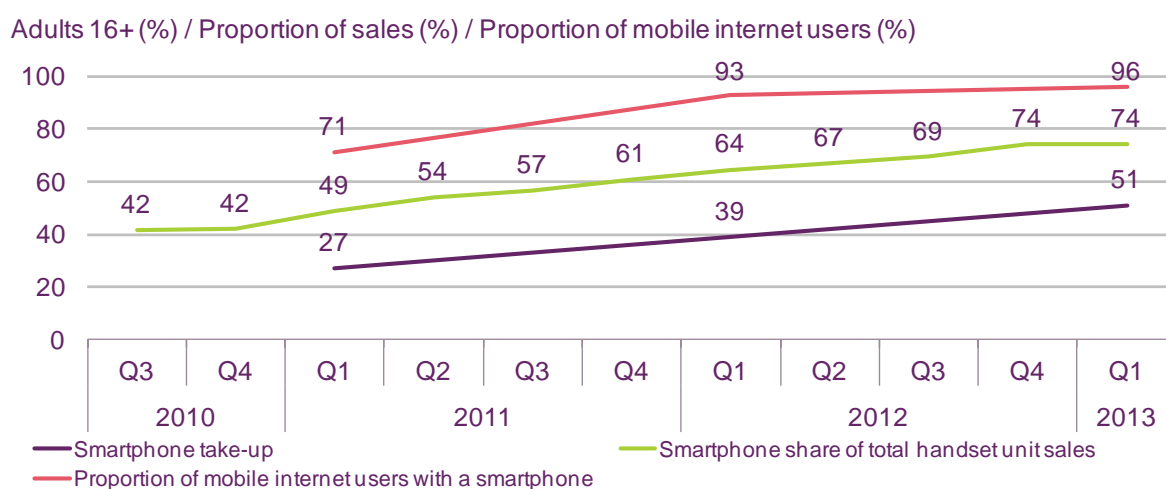
Base: All adults aged 16+, Q1 2009 n=5273, Q1 20103 n=3750

Note: \*15-24 for Q1 2009 data

## Almost all mobile internet users own a smartphone, compared to 51% of all UK adults

A likely driver of mobile internet access is the take-up of smartphones. Larger screens, optimised browser software, 3G connections, and the ability to run applications that connect to the internet are features of smartphones that make using the internet on a phone easier, and may have encouraged take-up. In recent years smartphones have been the most popular type of handset sold, rising to almost three-quarters (74%) of the handsets sold in Q1 2013, up from half (49%) in Q1 2011. During this time, smartphone take-up grew in line with mobile internet access, and stood at 51% in Q1 2013. Furthermore, ownership of smartphones has increased among mobile internet users, and has grown from 71% of mobile internet users to 96% over the same period.

**Figure 4.4 Smartphones: take-up, share of handset sales and mobile internet use**



Source: GfK / Ofcom Consumer Research

## The top ten mobile internet properties<sup>66</sup> overlap greatly with the top ten laptop and desktop internet properties

Figure 4.5 lists the most popular internet properties among mobile internet users and laptop and desktop internet users, by unique audience<sup>67</sup>. Google Sites had the highest unique audience of 17.1 million among mobile internet users in April 2013.

There is a high degree of overlap between the top ten internet properties visited on the mobile internet and the top ten properties visited by laptop and desktop internet users. The internet properties of mobile network operators O2 (Terra–Telefonica) and Vodafone (Vodafone Group) are the only two properties that appear in the mobile internet top ten, with unique audiences of 3.9 million and 3.0 million respectively. Subscriber information, and services that customers access through their mobile browser, and mobile browser homepages which default to an operator's website, are factors likely to increase the audience of these internet properties.

The data in Figure 4.5 do not include consumers who have accessed services offered by an internet property through mobile applications; instead, the mobile unique audience of an

<sup>66</sup> Properties represent all full domains (i.e. felmont.com), pages (i.e. sports.felmont.com/tennis), applications or online services under common ownership or majority ownership for a single legal entity. A property is the highest level in comScore's Client Focussed Dictionary. See p. 20 for further explanation of the comScore dictionary.

<sup>67</sup> We define unique audience as the total number of unique persons who visited a website or used an application at least once in a given month. See p. 20 for further details of webpage metrics.

internet property only includes visits made through the mobile browser. This is an important consideration when assessing the popularity of internet services where a mobile app is the principal means of interaction. For example, Ofcom consumer research claims that 23% of smartphone users tweet using Twitter<sup>68</sup>, while comScore data shows that the active reach of Twitter.com for mobile internet users is only 3.9%<sup>69</sup>. Twitter has applications available for all of the most popular smartphone operating systems; therefore it is likely that most Twitter users access the service through a mobile app and not via the browser.

Finally, we use comScore’s GSMA MMM source to measure the mobile unique audience of internet properties when the user accesses the internet only through their operator’s network (i.e. their 2G, 3G or 4G signal). Visits to websites from a mobile which is connected to the internet through a WiFi connection are excluded. This is important when assessing the popularity of websites which mobile users prefer to access over WiFi (perhaps to avoid using their mobile data allowance, or for faster speeds) such as video streaming sites.

**Figure 4.5 Top ten internet properties accessed by mobile, and by laptop/desktop users**

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

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

### Mobile-only unique audience share is highest among mobile network operators

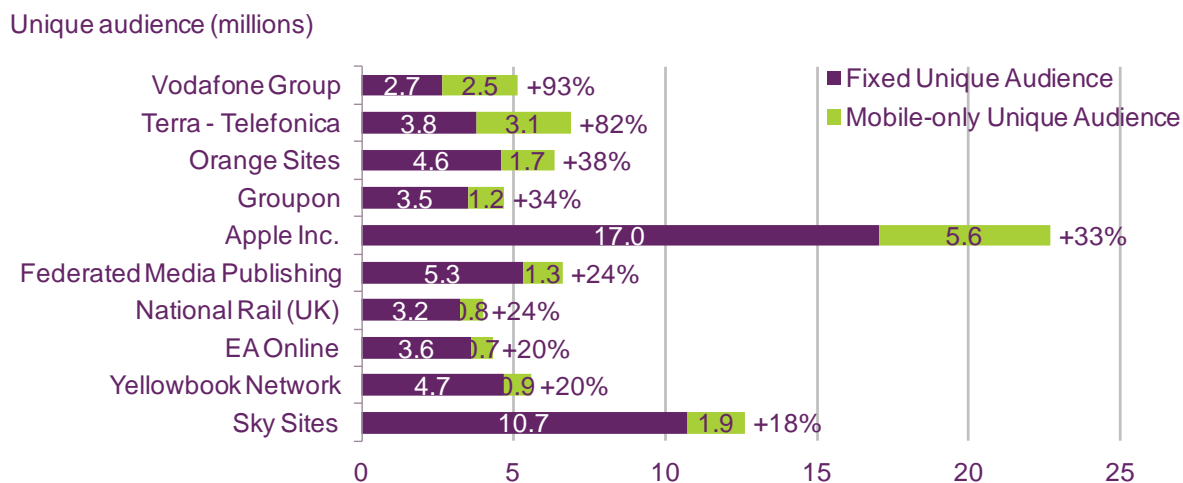
In April 2013, the unique audience of Vodafone’s internet property (Vodafone Group) reached 93% more unique users through mobile, the largest proportional increase among the top 100 internet properties. Other mobile network operators O2 (Terra–Telefonica) and Orange had the second and third largest increases respectively. As above, services offered to mobile subscribers – such as checking bank balance or monthly spend, are delivered to consumers through mobile browsers which is likely to increase the proportion of mobile-only visitors to these internet properties.

Figure 4.6 also indicates other activities which are popular with mobile-only audiences: checking train times (National Rail UK); mobile gaming (EA Online); and catching up on the latest sports news (Sky Sites – the Sky Sports website is particularly popular among mobile users).

<sup>68</sup> Source: Kantar face-to-face omnibus, 05/04/13 - 09/04/13 (2,092). Base: All who use a smartphone (967)

<sup>69</sup> comScore GSMA MMM, browser access only, on network, April 2013

**Figure 4.6 Internet properties with the greatest proportional increase in total unique audience through mobile**



Source: comScore MMX Multi-Platform, UK, April 2013

Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams and, on-network mobile browsing use.

### 4.1.3 Mobile internet advertising drives digital advertising growth

#### Digital advertising exceeds £5.4bn in 2012

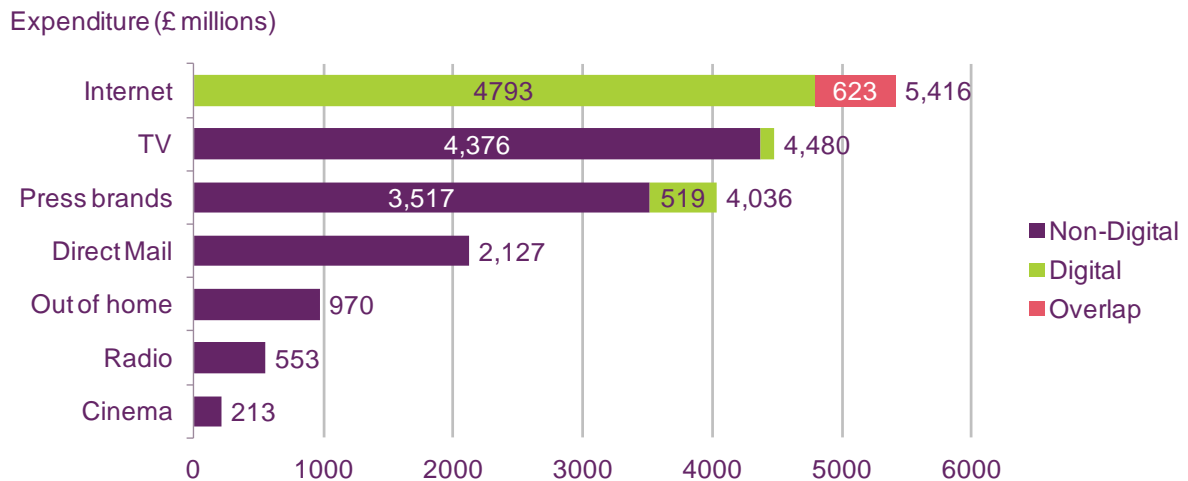
In 2012, spend<sup>70</sup> on digital advertising was just over £5.4bn, up 13.3% on 2011, of which £4.8bn was spent with internet-only advertising channels, up 13.0% on 2011. The remaining £623m of digital advertising expenditure was spent with advertising channels who advertise both offline and online, split between broadcaster video-on-demand spend (£104m) and online spend by press brands (£519m).

Advertising spend for video on demand was the fastest-growing digital advertising platform, up 73.3% on 2011, followed by national news brands, up 29.3%. Growth in digital adspend on regional news brands and magazine brands remained broadly static at 1.4% and 1.5% respectively, while non-digital adspend declined across all press brands.

<sup>70</sup> Advertising spend, adspend, expenditure and revenue are equivalent and used interchangeably in this chapter. These terms of reference do not include advertising production costs.



**Figure 4.7 UK advertising expenditure: 2012**



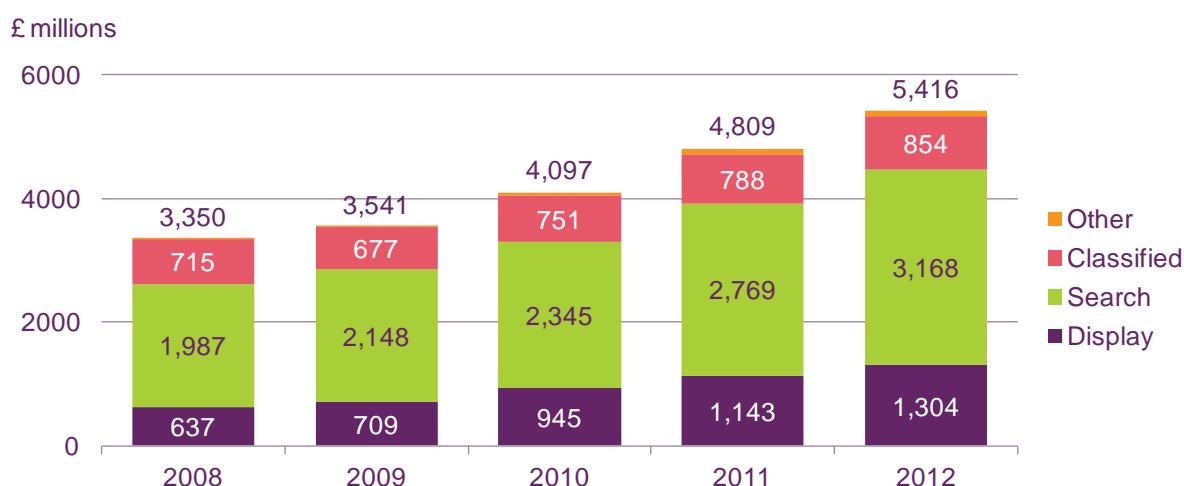
Source: AA/Warc Advertising Expenditure Report 2013, <http://expenditurereport.warc.com/>  
 Note: Press brands is a consolidation of magazine brands and national and regional newsbrands. Digital TV spend is broadcaster video on demand revenue. Overlap is the sum of digital spend across other sectors.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

**Growth of digital advertising is mostly in search and display formats**

Search advertising (£3.2bn) remained the largest source of digital adspend in 2012 with more than half of digital revenues, followed by display (£1.3bn) and classified (£854m). On a like-for-like basis, growth in search advertising was greatest, up 14.5% on 2011, compared to display advertising which grew marginally less, up 12.4%, and classified revenues which grew by 6.3%.

Search advertising revenues are generated by adverts placed against specific keywords that internet users search for on search engines such as Google, Yahoo! and Bing (see section 4.3.3 for more on search). Search advertising is unique to the internet and allows advertisers to target users with specific interests. By contrast, digital display advertising is very similar to display advertising in the press and elsewhere, except that adverts are placed as banners on web pages rather than newspaper pages. Digital classified adverts are also very similar to their print counterparts, being placed mainly by individuals buying or selling items on websites such as Gumtree or Autotrader.com. Other digital advertising revenue is generated from emails, online audio, lead generation and search affiliate advertising.

**Figure 4.8 Digital advertising expenditure by type: 2008-2012**



Source: IAB / PwC Digital Adspend 2008 – 2012

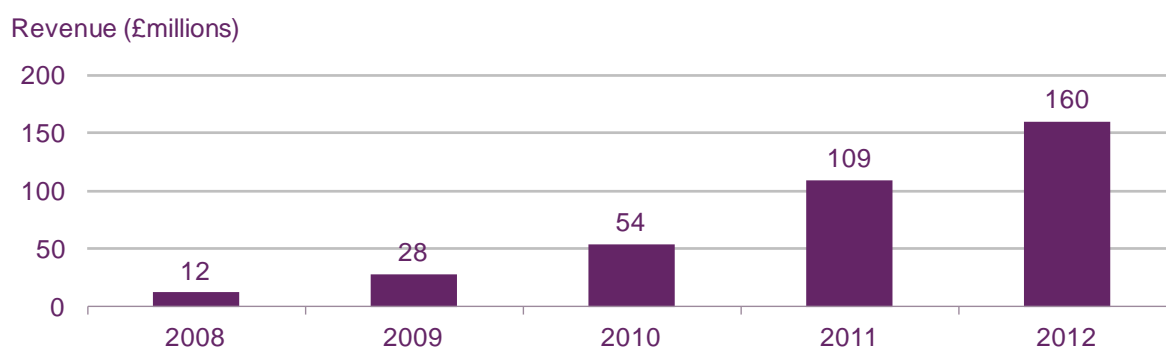
The digital landscape is expanding: the proliferation of internet-connected devices (see section 4.2.5) is providing new opportunities for media owners to generate search and display advertising revenue from their digital assets. Digital video advertising has benefited from the spread of video-on-demand services across platforms (see section 2.1.4), while mobile advertising now has the potential to reach half of all UK adults<sup>71</sup> (see section 4.1.2). Both of these categories of advertising are discussed below.

### Digital video advertising growth slows, but increases digital display share

Online video advertising can take one of two forms. The first is similar to display advertising on websites, but in the form of an audio-visual advert rather than a static image or series of animated images. The second is similar to traditional spot television advertising, where adverts are shown either before, after, or mid-way through an online video.

Digital video advertising revenues grew from £109m to £160m in 2012, a like-for-like growth of 46%. In the past four years revenues have grown more than 13-fold, from £12m in 2008; however, growth appears to be slowing after three years of doubling revenues. Nevertheless, in comparison to the rest of the digital display market, digital video advertising represents a growing proportion of digital display revenue, making up 12% of spend in 2012, up from 10% in 2011.

**Figure 4.9 Video display advertising revenue: 2008-2012**



Source: IAB / PwC Digital Adspend 2008 – 2012

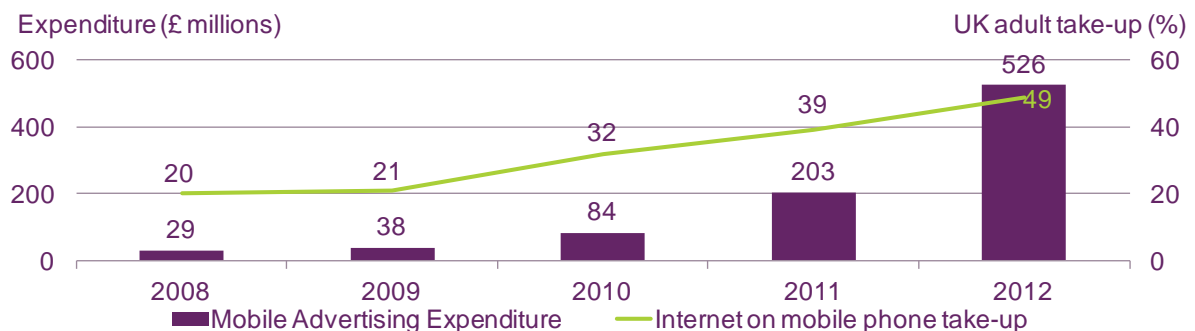
<sup>71</sup> Mobile SMS advertising has been able to reach more than half of the UK adults since Q2 2000, although this made up only 1.7% of mobile advertising spend in 2012.

## Mobile advertising grew £323m in 2012 – more than half of digital advertising growth

Mobile advertising expenditure rose to £526m in 2012, growing like-for-like 148% from £203m in 2011. The absolute increase of £323m accounted for more than half (53%) of the 2012 increase in total digital adspend.

It is likely that advertisers have sought to invest in mobile advertising as the audience and capabilities of the mobile internet have increased. Figure 4.10 illustrates how mobile advertising spend has risen, as more and more consumers have become mobile internet users. Mobile advertising in 2012 accounted for just less than a tenth (9.7%) of total digital advertising spend, up from just 1.1% three years ago.

**Figure 4.10 Mobile advertising expenditure and mobile internet take-up**



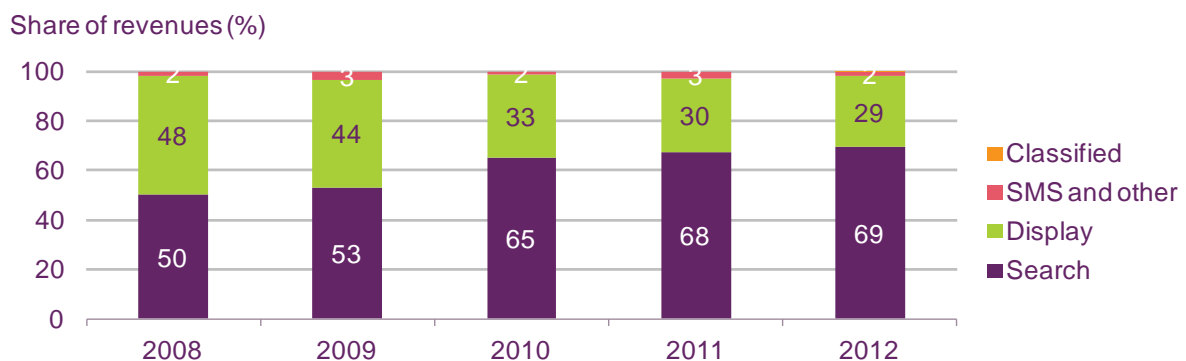
Source: IAB / PwC Digital Adspend 2008 – 2012; Ofcom consumer research.  
 Note: Take-up figures are from Q1 of the following year.

## Search advertising is the strongest format on mobile

Mobile search ad spend grew like-for-like by 164% to £365m in 2012, increasing its share of mobile advertising spend to 69% versus display advertising (29%). Mobile display advertising grew like-for-like by 121% to £150m, helped in part by the 16-fold increase in mobile video advertising revenues, which grew from £0.8m to £13m in 2012.

Two advertising formats unique to mobile advertising are SMS and MMS adverts. Adverts sent by SMS or MMS are compatible with a large number of handsets and are charged by advertisers in a 'cost per click' fashion, or by the number of impressions. SMS and MMS messages are also used in location-based advertising and pushed to consumers when they enter a particular cell on the network. The share of SMS and other revenues declined from 3% to 1.7% in the same period, while mobile classified advertising gained a share for the first year (0.4%) in 2012.

**Figure 4.11 Mobile advertising, by type: 2008-2012**



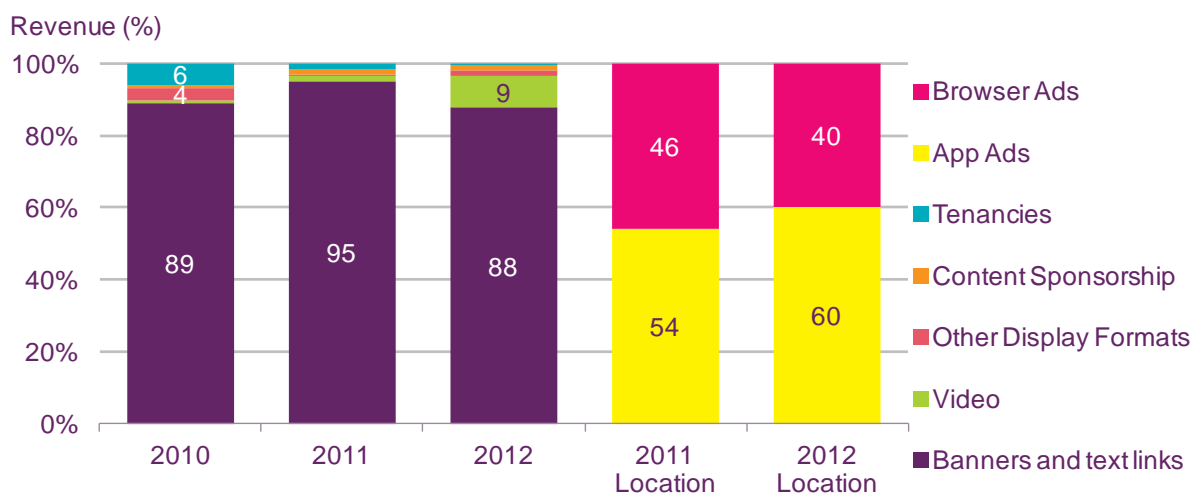
Source: IAB / PwC Digital Adspend 2008 – 2012

## Mobile video advertising increases from £0.8m to £13m in 2012

In 2012, 60% of mobile display advertising revenue was generated from mobile applications. Revenues from apps are distinct from the wider digital display advertising market because space for display advertising is hard-coded into a mobile application, while browser advertising is delivered alongside a website's content.

Mobile display advertising can be segmented further still. Figure 4.12 shows that the majority of display advertising revenue in 2012 was generated by display banners and text link advertising (88%). Mobile video display advertising made up almost a tenth (9%) of mobile display advertising spend (£13m, up from £0.8m in 2011). Mobile video display advertising is similar to its laptop and desktop computer counterpart and was the fastest growing type of mobile display advertising in 2012. The remaining revenues were split between tenancy<sup>72</sup> revenues (0.6%), content sponsorship (1.2%) and other display formats (1.8%).

**Figure 4.12 Mobile display advertising revenues, by type and location: 2010 – 2012**



Source: IAB / PwC Digital Adspend 2008 – 2012

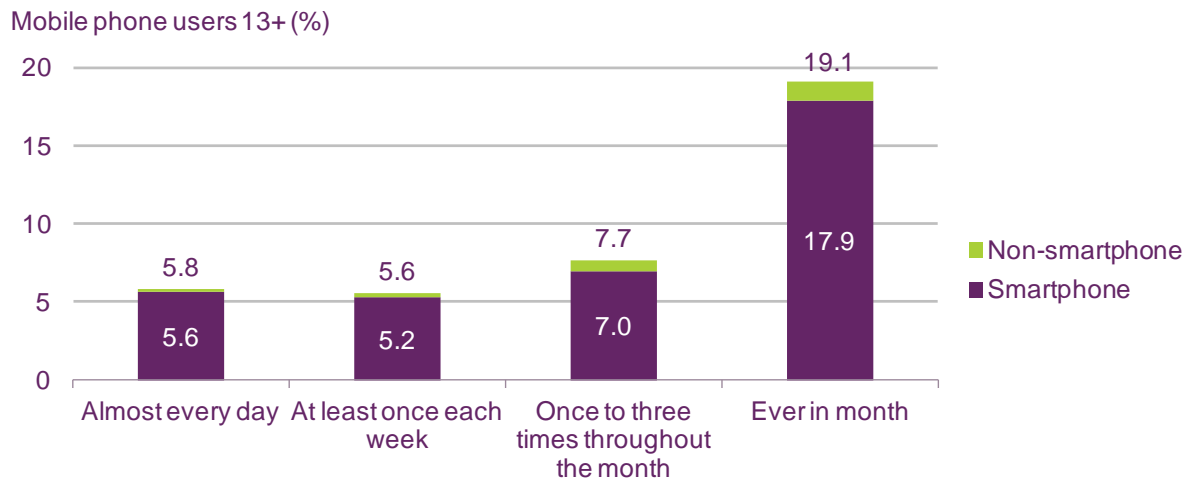
## One in five mobile phone users claim to remember seeing mobile advertising 'ever' in a month

More than one in twenty (5.8%) mobile phone users claimed to recall<sup>73</sup> mobile advertising almost every day in the three months to March 2013. A similar proportion (5.6%) claimed to remember seeing advertising at least once a week, while overall almost one in five (19.1%) claimed to do so 'ever' in a month. At all frequencies of recall, non-smartphone owners made up less than 10% of mobile phone users.

<sup>72</sup> Tenancy deals are typically long-term strategic partnerships between tenants (the advertiser) and media owners, which often include revenue share agreements. For example, the dating section of Yahoo! UK's homepage includes what appears to be a long-term advertising deal from Match.com.

<sup>73</sup> Advertising recall is a measure of whether an individual recalled whether there was advertising. It does not require the individual to have recalled what was advertised.

**Figure 4.13 Frequency with which mobile phone users recall seeing mobile advertising**



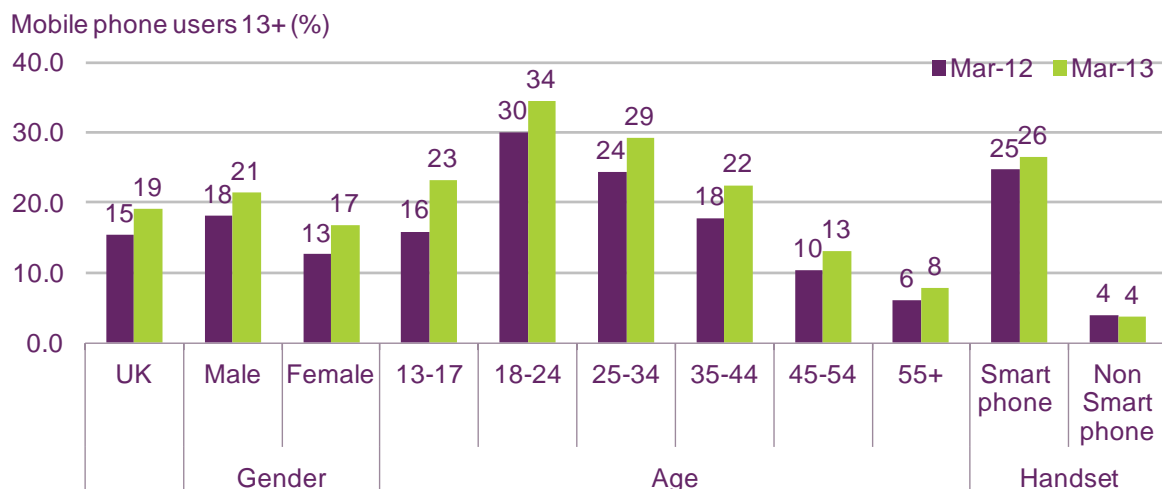
Source: comScore MobiLens, UK, 3 month average ending March 2013

**Smartphone owners are six times more likely to recall mobile advertising than non-smartphone owners**

Between the three months to March 2012 and the three months to March 2013, the proportion of mobile phone users who remembered seeing mobile advertising at least once during the month rose from 15% to 19% (Figure 4.14). This increase was reflected broadly across genders and age groups, with the largest rise occurring among those aged 13 to 17 and the smallest among those aged 55 or older.

However, among smartphone owners, the proportion who recalled mobile advertising increased only marginally, by one percentage point to 26%; while levels of recall were static at 4% between years among non-smartphone owners. Given that rates of advertising recall were more than six times greater among smartphone owners than non-smartphone owners, it is likely that the broad increase in recall across age and gender is in part a reflection of the rising take-up of smartphones during this period (see Figure 4.4).

**Figure 4.14 Gender, age and handset of those who recall mobile advertising**



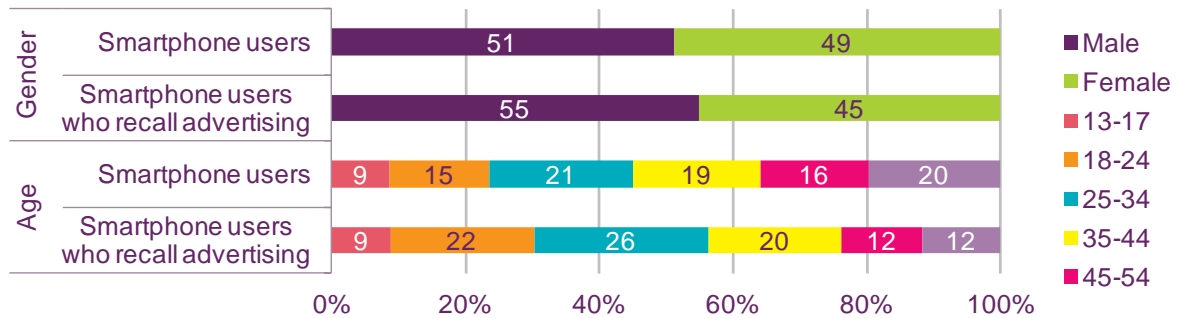
Source: comScore MobiLens, UK, 3 month average ending March 2012 and March 2013

**Those who recall mobile advertising are more likely to be young and male.**

Compared to all smartphone owners, those who recalled mobile advertising at least once in a month were more like to be male and of younger age groups (Figure 4.14). Fifty-five per cent of the smartphone users who recalled advertising were male, compared to 51% of the smartphone population overall. The majority (57%) of smartphone users who recalled mobile advertising were under the age of 35, although under-35s make up a minority (45%) of all smartphone owners.

**Figure 4.15 Profile of smartphone users who recall mobile advertising**

Smartphone users 13+ (%)



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

## 4.2 Internet and devices

### 4.2.1 Introduction

As internet take-up has risen in the past decade, so has the number of devices which use it to communicate and deliver content. Internet-enabled devices greatly determine the consumer experience and the range of content, communications and services accessed on the internet. In this section we examine the popularity of these devices after considering internet access as a whole.

- Section 4.2.2 considers the **platforms consumers use to access the internet**, both fixed and mobile.
- Section 4.2.3 explores **internet take-up** and how this varies by age, gender and socio-economic group.
- Section 4.2.4 looks at the length of **time spent online** on laptop and desktop computers by UK internet users.
- Section 4.2.5 examines the **take-up of internet-enabled devices** and how this varies by age and social-economic group.
- Section 4.2.6 looks at **the use of, and preferences for, internet-enabled devices** by those who own them.
- Section 4.2.7 considers those consumers who are not online, and looks at factors affecting **digital inclusion**.

### Key findings

The key findings from this section of the report are:

- **Eight in ten households have home internet access.** Household internet access rose to 80% in Q1 2013, just one percentage point higher than in Q1 2012, the slowest growth since internet take-up stalled in 2006. In contrast, mobile internet access rose ten percentage points to 49% of adults, the second fastest growth on record.
- **Those aged 65+ and those from DE households still lag behind the UK average on internet take-up.** Internet access in Q1 2013 was lowest among those aged 65-74 and 75+, at 56% and 31% respectively, and those in DE households at 65%.
- **Laptop and desktop internet users spend at least 35 hours online each month.** The average time spent browsing webpages on a laptop or desktop computer was 35.4 hours per month per internet user in April 2013, up 3.6% on April 2012. The equivalent time on a mobile phone was 5.2 hours per month, up 9.4% in the same period.
- **The average UK household owns three different types of internet-enabled device**, and 86% have at least one. Laptop computers, smartphones and fixed games consoles are the most likely devices to be adopted in an average household.
- **More than 30% of webpage traffic came from mobile phones and tablets in February 2013.** The proportion of page views from desktop and laptop computers

declined by 20 percentage points to 69% in the 11 months to February 2013. In the same period the proportion of webpage views from mobile phones almost tripled, and the proportion from tablets doubled, to 23% and 8% respectively.

- **Three in four offline households don't intend to get an internet connection.** Of the 20% of UK households who do not have access to the internet, the majority (14%) do not intend to get connected, while only 3% of respondents said they were likely to get an internet connection at home in the next 12 months.

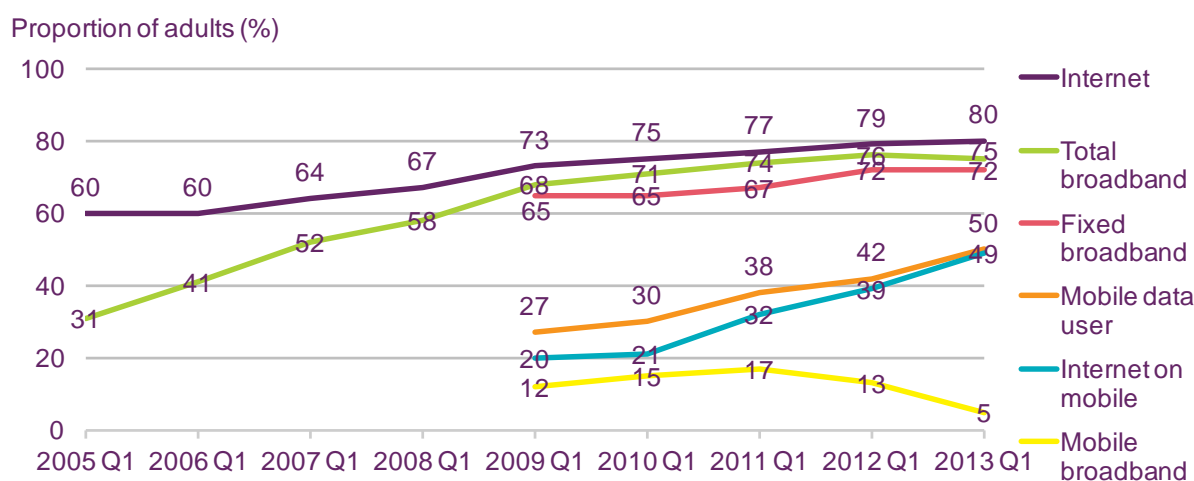
## 4.2.2 Internet take-up, by platform

### Eight in ten households have home internet access

Household internet access rose to 80% in Q1 2013, just one percentage point higher than in Q1 2012, the slowest growth since internet take-up stalled in 2006. In contrast, mobile internet access rose ten percentage points to 49% of adults, the second fastest growth on record. For more on the rise of the mobile internet see Section 4.1.2.

Fixed broadband remained at 72% of households in Q1 2013, while the decline of mobile broadband through a dongle or built-in connection accelerated, falling by eight percentage points to just 5% of households in the UK. Total broadband access was sustained at 75%; the one percentage point drop was not statistically significant. For more on how consumers connect to the internet see section 5.3.

**Figure 4.16 Household internet access: 2005-2013**



Source: Ofcom technology tracker, Q1 2013. Base: All adults aged 16+ (n=3750).

Note 1: 'Internet on mobile' is the % of adults who use a mobile phone for any of the following activities: instant messaging, downloading apps or programs, email, internet access, downloading video, video streaming, visiting social networking sites.

Note 2: From Q1 2009 the 'internet' figure includes those who access the internet on mobile phones. QE2: Do you or does anyone in your household have access to the internet/world wide 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?

### Wireless router adoption continues to grow despite flat fixed broadband take-up

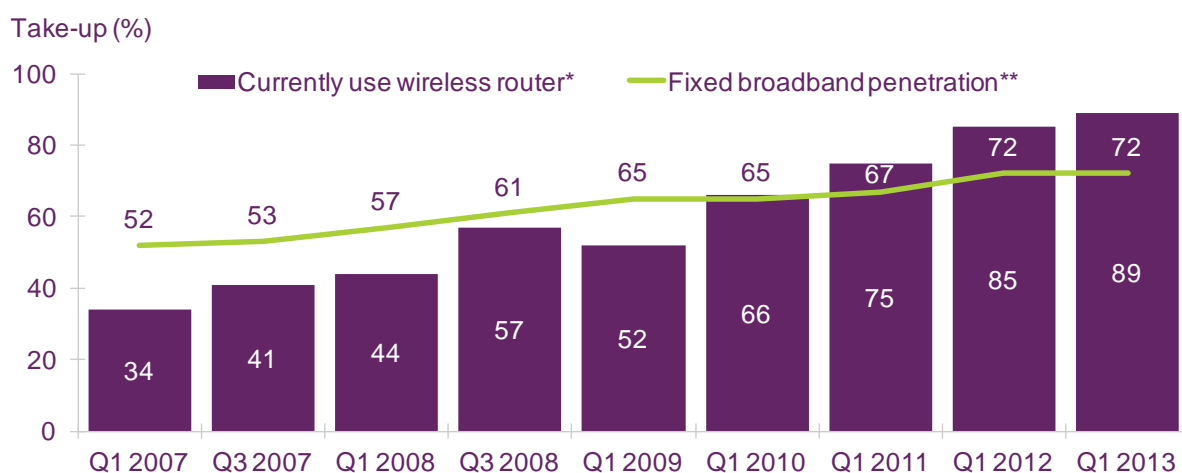
Despite flat take-up of fixed broadband among UK households between Q1 2012 and Q1 2013, the proportion of fixed broadband connected homes using a wireless router continues to increase. Almost nine in ten households (89%) with a fixed broadband connection have a wireless router, up five percentage points on Q1 2012.



A wireless router, or WiFi router, enables a household to share its internet connection over a wireless local area network with devices that have a WiFi adapter or an embedded wireless module. WiFi adapters are typically external USB dongles or internal peripheral component interconnect (PCI) cards used for desktop computers, or other internet-enabled devices such as games consoles and smart TVs. Embedded WiFi modules are typically found in portable internet-enabled devices such as laptops, netbooks, smartphones, portable games consoles, tablets and e-readers, but they are also becoming more prevalent in fixed devices such as television set-top boxes, smart TVs, and fixed games consoles.

Internet service providers typically include a bundled WiFi router in their broadband service package; this is likely to have driven take-up of WiFi routers in homes. As highlighted above, a number of devices that were not widely available five years ago (e.g. netbooks, smartphones, and tablets) can be connected to the internet over WiFi. Section 4.2.5 describes the take-up of these devices.

**Figure 4.17 Wireless router and broadband take-up: 2007 to 2013**



Source: Ofcom research, Q1 2013

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

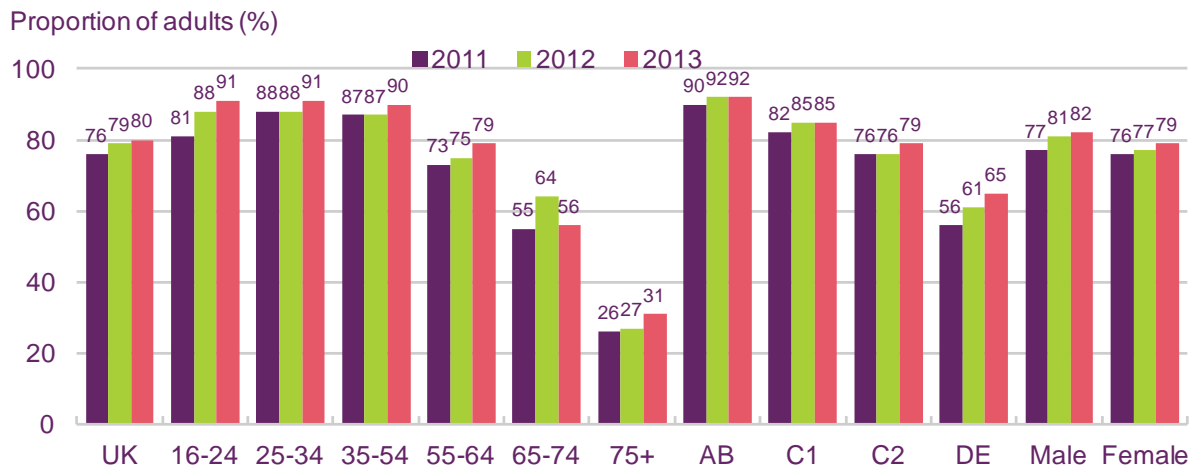
### 4.2.3 Internet take-up

#### Those aged 65+ and those from DE households still lag behind the UK average on internet take-up

Internet access among UK adults stood at 80% in Q1 2013, although take-up varied across age, gender and socio-economic group. The biggest differences were between the youngest and eldest age groups: 91% of those aged 16-24 and 25-34 had access to the internet while only 31% of those aged 75 and over had the same.

AB households were most likely to have access to the internet, with take-up at 92%, while adults from DE households were least likely to have access (65%). Differences between men and women were much smaller, with men slightly more likely than the UK average to have access (82%) and women slightly less (79%).

**Figure 4.18 Home internet access by age, socio-economic group, and gender**



QE2: Do you or does anyone in your household have access to the internet/ world wide web at home?

Source: Ofcom technology tracker, Q1 2013. Base: All adults 16+ (n = 3750 UK, 456 16-24, 620 25-34, 1230 35-54, 589 55-64, 467 65-74, 388 75+, 794 AB, 1073 C1, 773 C2, 1108 DE, 1792 male, 1958 female)

### comScore

The UK Online Measurement Company (UKOM) was formed in 2009 with a mandate from the advertising industry to establish measurement standards for digital media. In 2011, comScore was appointed the sole data supplier for UKOM on a three-year contract from January 2013.

This chapter predominantly draws from four comScore sources. For analysis of laptop and desktop computer internet activity we use comScore MMX which employs comScore's Unified Digital Measurement methodology, explained below. For analysis of mobile internet activity we use comScore GSMA MMM, which is based on the records of internet activity captured by the mobile network operators (this analysis is limited to the caveats outlined for Figure 4.5). For analysis of internet activity across platforms we use comScore MMX Multi-Platform, which provides unduplicated metrics across laptop and desktop computers and mobile devices. Finally, mobile phone user behaviours are supplemented by consumer research comScore MobiLens (this is not part of the UKOM suite).

### Methodology

comScore's Unified Digital Measurement (UDM) methodology combines panel and census measurement techniques of digital audience measurement. UDM uses comScore's UK measurement panel to determine audience reach and demographics. Census-level activity is captured from publishers' digital content, such as on websites, videos, and computer and mobile applications. comScore combines census-level data with that captured from the panel to help build a more accurate view of audiences and their consumption habits. This approach allows comScore to capture the most accurate consumption activity from publishers, and attribute this to audience demographics in a manner that is not affected by cookie deletion, blocking, and rejection.

## Metrics

Throughout this report we shall make reference to a number of metrics as defined below:

**Unique audience** – the total number of unique persons who visited a website or used an application at least once in a given month. Persons visiting the same website more than once in the month are therefore counted only once in this measure.

**Active audience** – the total number of people who visited any website or used any internet connected application at least once in a given month.

**Digital audience** – the active audience across laptop/desktop computers and mobile phones.

**Active reach** – the unique audience of a website as a proportion of the active audience.

**Digital reach** – the active reach of a website across laptop/desktop computers and mobile phones.

**Time spent per month** – the average time spent browsing a website per unique visitor per month (excludes time spent watching online video and listening to streamed music, and for mobile audiences excludes any traffic over a home or public WiFi connection).

## Dictionary

Each of the entities reported by comScore are attributed to a level in comScore's *Client Focused Dictionary*. Several entities can exist within one website (e.g. BBC Sport and BBC iPlayer) and comScore's dictionary defines how these entities are structured and related to each other. It is client-focused because comScore's clients define how their websites appear in reports according to this dictionary. This six-tiered dictionary structure is used by comScore MMX, MMX Multi-Platform, and GSMA MMM products, and we include a reference in square brackets in figures where appropriate.

**Property [P]** - *The highest level of reporting in the Client Focus structure, Properties represent all fFull Domains (i.e. felmont.com), Pages (i.e. sports.felmont.com/tennis), Applications or Online Services under common ownership or majority ownership of a single legal entity. A Property may also contain any digital media content that is not majority owned but has been legally signed over for reporting purposes by the majority owner.*

**Media Title [M]** - *A Media Title is an editorially and brand consistent collection of content in the digital landscape that provides the marketplace with a view of online user behaviour. This may represent a domain, a group of domains, online service or application.*

**Channel [C], SubChannel [S], Group [G] and SubGroup [SG]** - *Within a Media Title there may be grouped URLs of editorially consistent content that make up a Channel. For some of the largest Media Titles, Channels themselves may be broad, and Subchannels, Groups and Subgroups within the larger Channels may prove useful for categorisation within the comScore Dictionary.<sup>74</sup>*

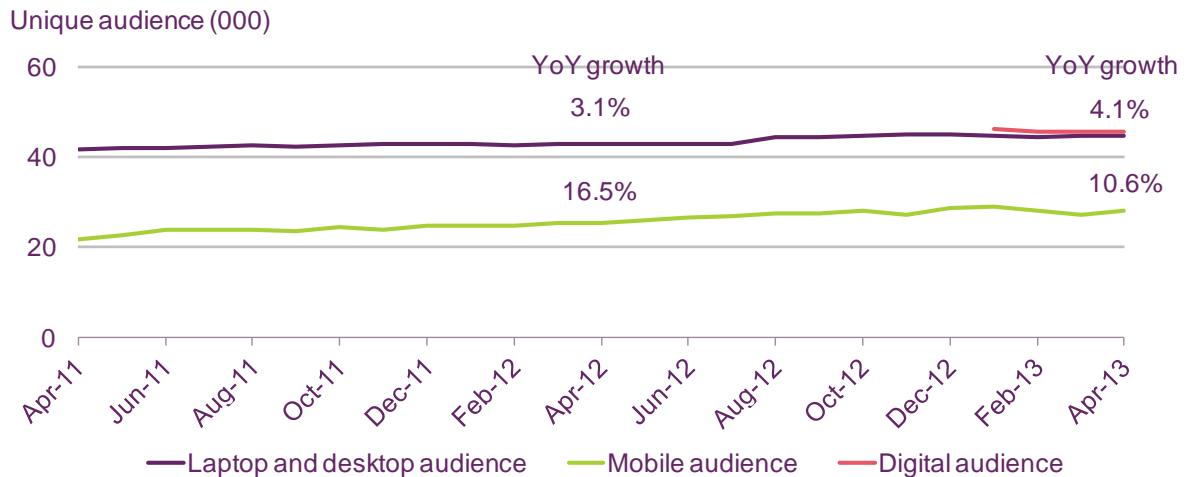
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<sup>74</sup> "Glossary – Key Terms for comScore Dictionary", comScore.

## Despite slowing, active audience growth on mobile is still 2.5 times as fast as laptop and desktop audience

In the year to April 2013, the active online population on laptop and desktop computers grew by 4.1%; from 42.8 million to 44.6 million unique users. In the same period the active online population on mobile phones has grown almost two and a half times as fast (10.6%) from 25.4 million to 28.1 million unique users. However, in the first four months of 2013 the digital audience, the measure of the active online populations on either laptop, desktop, or mobile devices, has remained steady at between 45.5 million and 46.0 million unique users.

**Figure 4.19 Active internet audience on laptop, desktop, and mobile devices**



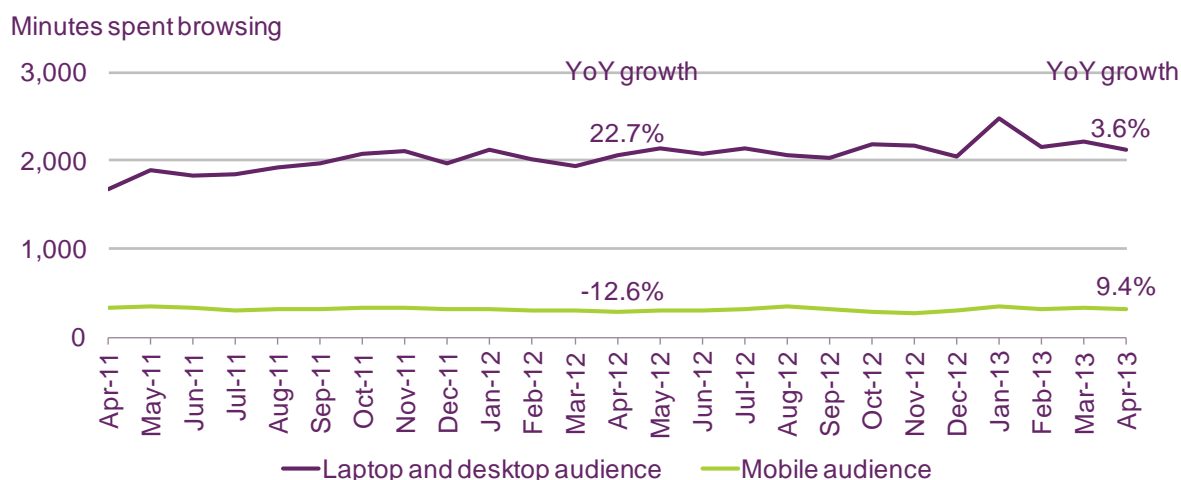
Source: comScore MMX, UK, home and work panel, April 2011 to April 2013; comScore MMX Multi-Platform, UK, home and work panel, January 2013 to April 2013; comScore GSMA MMM, UK, April 2011 to April 2013.

### 4.2.4 Time spent online

#### Laptop and desktop internet users spend at least 35 hours online each month

The average time spent browsing webpages on a laptop or desktop computer was 35.4 hours per month per internet user in April 2013, up 3.6% on April 2012. The equivalent time on a mobile phone was 5.2 hours per month, up 9.4% in the same period. However, it is likely that these averages underestimate the total time spent by internet users online. Both measures exclude time spent watching online video and listening to streamed music, while the time spent by the mobile audience browsing webpages excludes any traffic over a home or public WiFi connection.

**Figure 4.20 Average time browsing per internet user across laptop, desktop and mobile**



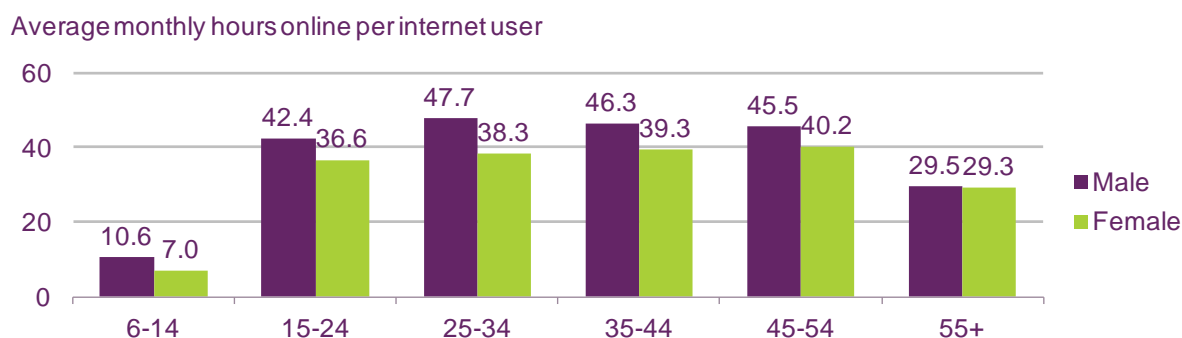
Source: comScore MMX, UK, home and work panel, April 2011 to April 2013; comScore GSMA MMM, UK, April 2011 to April 2013.

Note: Time spent online excludes time spent accessing other media such as audio or video content, and on mobile excludes time spent using mobile apps.

### Men spend more time online than women across all age groups

Across all age groups, as shown in Figure 4.21, men spent more time online than women on a laptop or desktop computer. Men between the ages of 25 and 34 spent the most time online, averaging 47.7 hours per internet user per month in April 2013. The largest difference in time spent online was also between men and women in this age group. By contrast, women aged 45-54 spent the most time online of any female age group (40.2 hours per internet user per month), while there was very little difference (12 minutes) between men and women aged 55 and over.

**Figure 4.21 Average time online on a laptop/desktop, by age and gender**



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

Note: Time spent online is a measure of time spent browsing web pages on laptop and desktop computers only. It excludes time spent accessing other media such as audio or video content.

### 4.2.5 Take-up of internet-enabled devices

Each of the devices highlighted in Figure 4.22 can connect to the internet; however, the networks over which the device connects and the internet experience that the device delivers both vary. Furthermore, while each of the devices below is capable of being connected to the internet, the degree to which the internet is integral to the device experience differs by device and by consumer expectation. For example, the primary purpose of a games console has always been to play games, but the most recent generation

of consoles can also be used to watch catch-up television over the internet. Nevertheless, the games console internet experience is not equivalent to that delivered through a web-browser on a desktop or laptop computer. To this extent, a device which is internet connected does not necessarily deliver a web experience. We analyse content and services in Section 4.3.

We examine the use of internet-enabled devices in the following sections of this report:

- Tablets – section 1.1 of the *Market in context* chapter.
- Smart TVs and internet-connected televisions (including games consoles and internet-enabled set-top boxes) – section 2.1.3 of the *Television and audio-visual content* chapter.

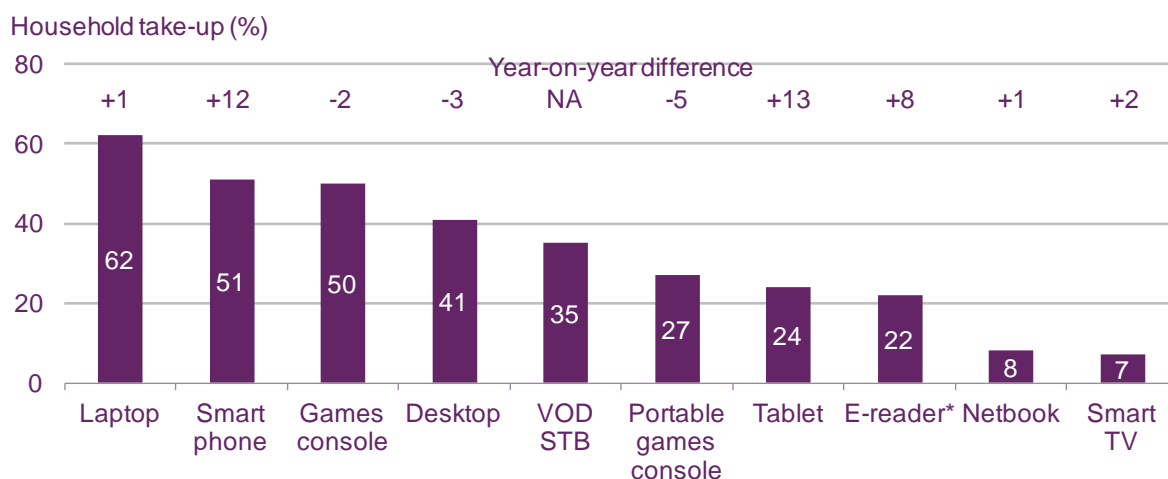
### The smartphone is second only to the laptop in the take-up of internet-enabled devices

The laptop computer is the most popular internet-enabled device and was present in 62% of homes in the UK in Q1 2013. Reflecting the strong growth of mobile internet users, shown in Figure 4.16, the smartphone is the second most popular internet-enabled device (51%), leapfrogging both games console (50%) and desktop computer ownership (41%) in the past year.

Tablet computers saw the biggest rise in take-up among households, increasing 13 percentage points to just less than one in four households. Take-up of portable games consoles had the largest decline in ownership, falling five percentage points to 27% of homes. This could be the effect of device substitution by smartphones and tablets, which have become popular portable devices for playing games (see section 1.1).

Consumers capable of receiving video on demand (VOD) through an internet-enabled set-top box (STB) include all Virgin pay-TV customers, Sky customers with a Sky+ HD STB, BT Vision customers and YouView owners. While some Freeview and Freesat boxes are also capable of receiving VOD, we have not been able to reliably identify these from our research, so the VOD STB take-up shown in Figure 4.22 is likely to be understated.

**Figure 4.22 Ownership of internet-enabled devices**



Source: Ofcom research, Q1 2013; Base: Adults aged 16+ n = 3750

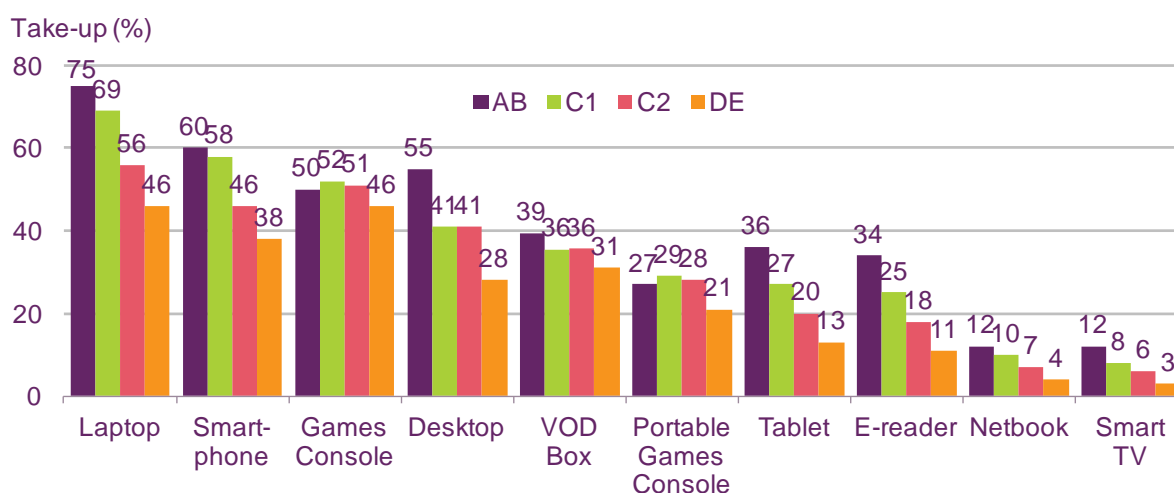
Note: IP-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), internet-enabled STB (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV. \*E-reader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

## AB households are more likely to own a tablet than a portable games console

Figure 4.23 shows take-up of each type of internet-enabled device among different social groups. For almost all internet-enabled devices, ownership is highest among AB households and lowest among DE households, probably an indication of the greater disposable income that AB households may have to spend on such devices. However, for fixed and portable games consoles, C1 households have greater take-up than AB households. Furthermore, these games consoles have some of the smallest differences in take-up between social groups among the devices analysed.

Figure 4.23 also shows how the popularity of internet-enabled devices varies by social group. For example, in contrast to the UK average shown in Figure 4.22, AB households are more likely to own a tablet (36%) than a portable games console (27%), while DE households are more likely to own a games console (46%) than a smartphone (38%).

**Figure 4.23 Take-up of internet-enabled devices, by socio-economic group**



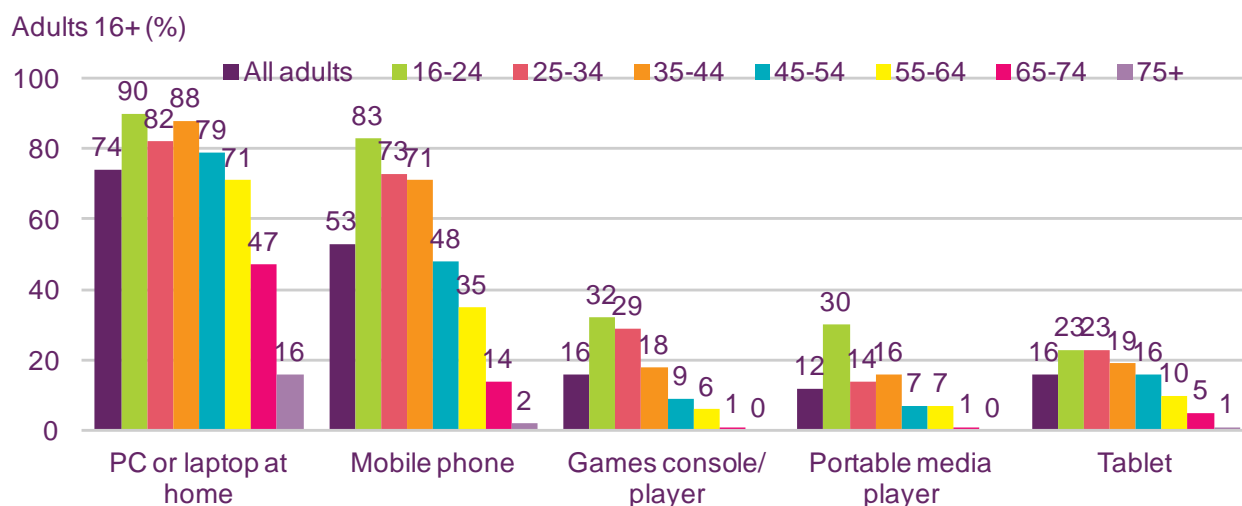
Source: Ofcom research, Q1 2013

Base: Adults aged 16+, AB n = 794, C1 n = 1073, C2 n = 773, DE n = 1108

## 16-24s are most likely to access the internet across a range of devices

Individuals aged 16-24 were most likely to have accessed the internet through the devices shown in Figure 4.24. In particular, those aged 16-24 were two and a half times more likely than the UK average to access the internet on a portable media player. However, among the oldest consumers, there was either very little access or none on a device other than a PC or laptop.

**Figure 4.24 Devices used in the home to access the internet, by age: 2012**



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

IN1/ IN2- Do you or does anyone in your household have access to the internet at home through a computer, laptop or notebook? And do you personally use the internet at home? Do you have and use any of the items shown on this card to access the internet or to visit internet websites? (Prompted responses, single coded).

Base: All adults aged 16+ (1805 aged 16+, 234 aged 16-24, 236 aged 25-34, 300 aged 35-44, 234 aged 45-54, 262 aged 55-64, 259 aged 65-74, 280 aged 75+). Significance testing shows any difference between any age group and all adults aged 16+.

### The average UK household owns three different types of internet-enabled device

Each household in the UK has, on average<sup>75</sup>, three different types of internet-enabled device, and 86% have at least one (Figure 4.25). Only one household in a thousand owns all ten types of device listed in Figure 4.22, although six in ten households (59%) own three or more different types of device.

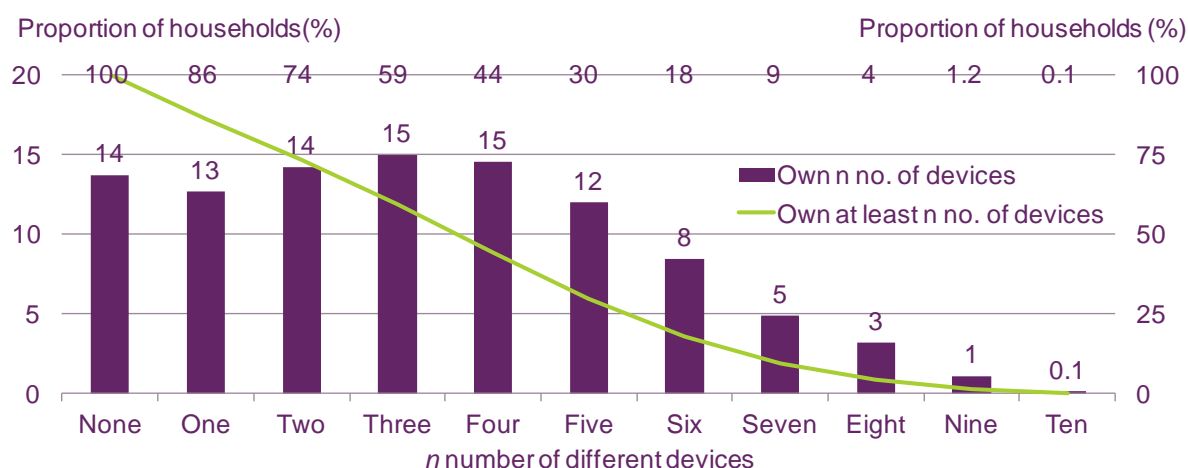
According to research by Deloitte, by December 2012 UK households owned on average 11.4 different types of *media consumption* device, up from 9.7 the previous year.<sup>76</sup>

<sup>75</sup> The sum of unique types of device (7367) divided by the sum of respondents (2256).

<sup>76</sup> Deloitte, *Media Consumer Survey 2013*, n=2085, consumers aged 14-75, online-only survey.



**Figure 4.25 Number of different internet-enabled devices per household: Q1 2013**



Source: Ofcom research, Q1 2013, Base: Adults aged 16+ n = 2256

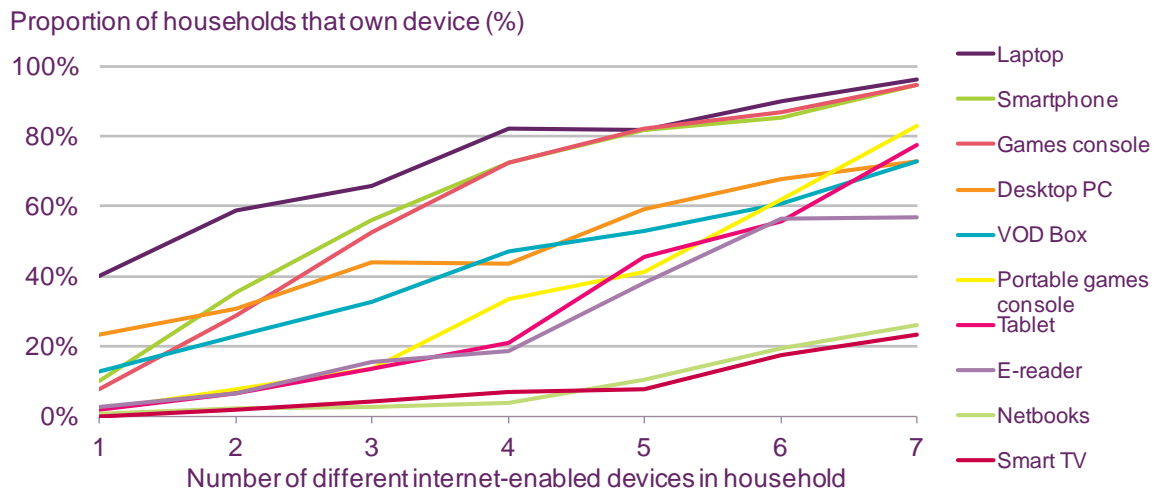
Note: Internet-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), video on demand set-top box (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV. NB. Data incomparable with previous years due to a change in definition of internet-enabled STB.

**The average UK household is most likely to own a laptop, smartphone and games console.**

Of the 86% of households that own at least one internet-enabled device, Figure 4.26 shows the likelihood of device ownership as the number of internet-enabled devices increases in a household. For example, 59% of households with two different types of internet-enabled device own a laptop, while only 23% of households with seven different types of internet-enabled device own a smart TV.

Figure 4.26 provides an indication of the most likely order in which consumers adopt different internet-enabled devices. As the number of internet-enabled devices increases, three tiers of device adoption emerge. Laptop computers, smartphones and fixed games consoles are the most likely devices to be adopted in households with three or more different devices, while netbooks and smart TVs are the least likely to be adopted. The remaining devices have approximately equal likelihood of being adopted, although desktop computers and video on demand set-top boxes lead this middle tier among households with fewer types of device.

**Figure 4.26 Device ownership, by number of different internet-enabled devices in the household**



Source: Ofcom research, Q1 2012

Base: Adults aged 16+ that own at least one IP enabled device n = 1946 (one device 286; two devices 321; three devices 338; four devices 328; five devices 271; six devices 191, seven devices 111.)

Note: internet-enabled devices include laptop, games console (Xbox 360, PS3, Wii/Wii U), desktop PC, smartphone, portable games console (Nintendo DS range, Playstation Portable/Vita), VOD Box (all Virgin TV customers, Sky+ HD, BT Vision, and YouView), e-reader, tablet, netbook, and smart TV.

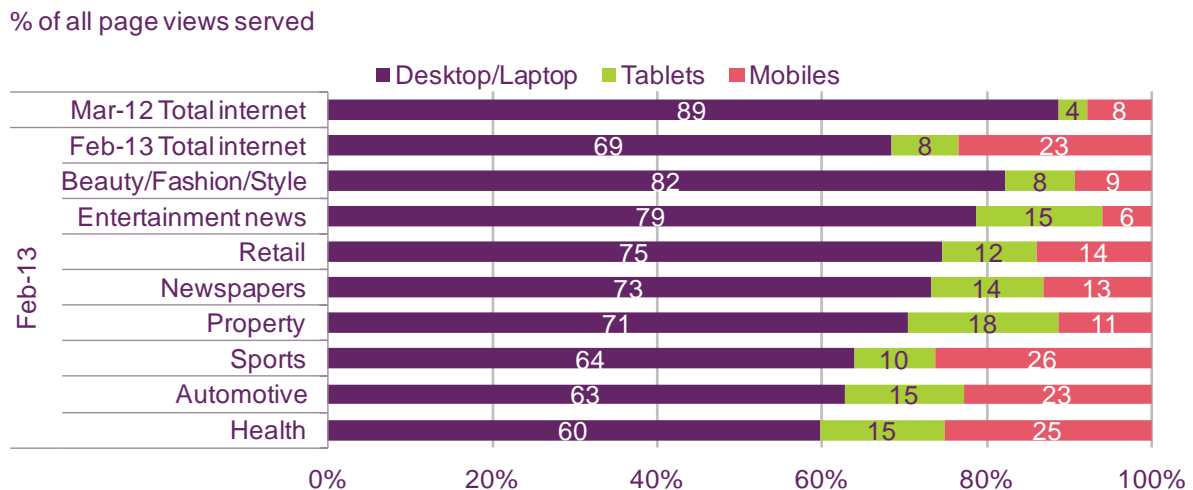
#### 4.2.6 Use of internet-enabled devices

##### More than 30% of webpage traffic came from mobile phones and tablets in February 2013

The proportion of webpage views from desktop and laptop computers declined 20 percentage points to 69% in the 11 months to February 2013. In the same period the proportion of webpage views from mobile phones almost tripled and the proportion from tablets doubled, to 23% and 8% respectively.

However, the proportion of webpage views from each device varies by the category of content viewed. Of the categories shown in Figure 4.27, laptop and desktop computers were most popular for viewing beauty, fashion and style content online (82% of webpage views) such as magazine titles *Glamour Magazine* and *Vogue*, and least popular for viewing health content (60%) such the NHS website. More than a quarter of (26%) of webpage views of sports content, such as the BBC Sports and Sky Sports websites, were from mobile phones, while 18% of webpage views for property content, such as websites [rightmove.co.uk](http://rightmove.co.uk) and [zoopla.co.uk](http://zoopla.co.uk) were from tablets.

**Figure 4.27 Proportion of page views on desktop/laptop, tablet, and mobile devices**



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

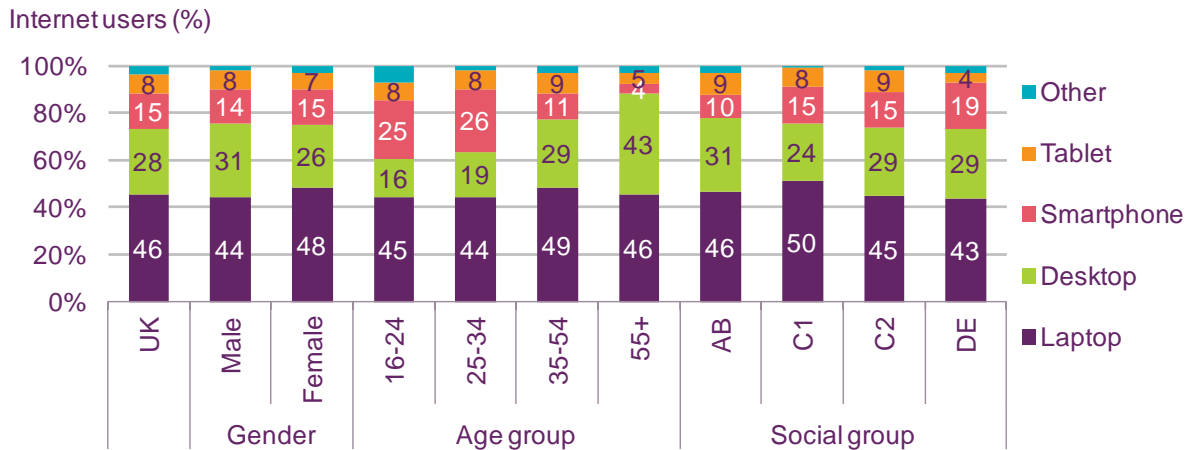
**No device is the most important for accessing the internet for the majority of internet users**

UK internet users were asked what they considered to be their most important device for accessing the internet. There was no majority for a single device, but the most popular choice was the laptop computer (46% of internet users), followed by the desktop computer (28%) and the smartphone (15%).

However, the most important device varies by gender, age and social group. Of the larger devices, internet users in the C1 social group were significantly more likely than DE users to choose the laptop, and significantly less likely to choose the desktop. Men were significantly more likely to choose the desktop than women, as were those aged 55+ than younger age groups.

Of smaller devices, those aged 16 to 34 were significantly more likely than older age groups to choose the smartphone. Those aged 25-54 were significantly more likely to choose the tablet than those aged 55+, and DE internet users significantly less likely to choose a tablet than all other social groups.

**Figure 4.28 Most important device for internet access**



Source: Ofcom research, Q1 2013

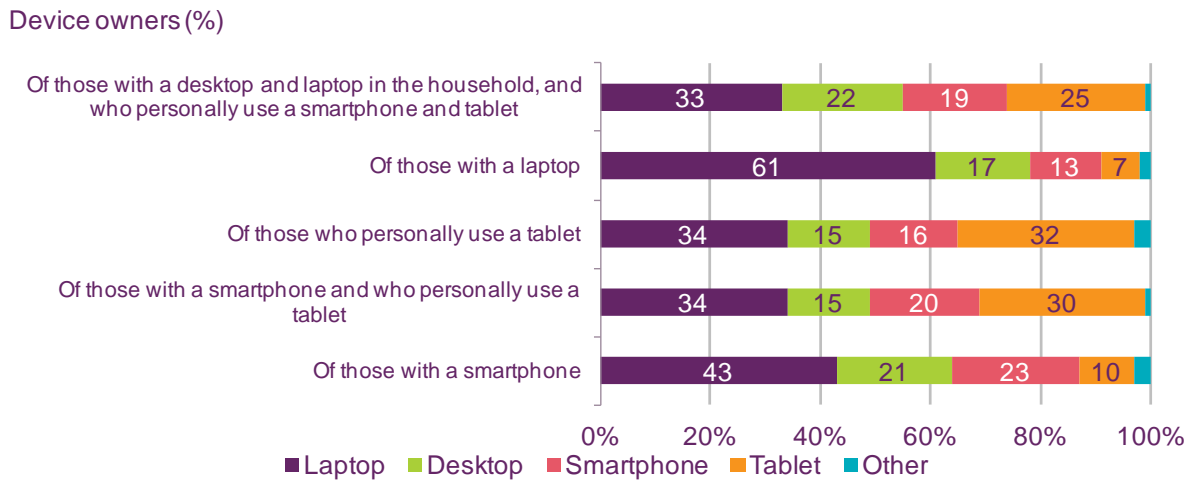
Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "netbook", "games console", "other device", "none" and "don't know".

**Among tablet owners, the tablet is on a par with the laptop as the most important device for accessing the internet**

Since take-up of the devices listed in Figure 4.28 is not universal, consumers' choice of the most important device for accessing the internet is limited to what they own. Figure 4.29 considers the most important device for accessing the internet, by device ownership.

Of those who own all four listed types of device, the laptop is the most important for a third of respondents (33%), and the tablet the most important for a quarter (25%). Most internet users who own a laptop (61%) report that this device is their most important means of internet access. However, of those who personally use a tablet, 34% choose the laptop and 32% choose the tablet as their most important device for accessing the internet. Preferences are similarly close between laptop and tablet among a base of smartphone and tablet owners. Despite being a relatively new type of device, the tablet is clearly making its mark on the habits and preferences of internet users who use them.

**Figure 4.29 Most important device for internet access, by device ownership**



Source: Ofcom research, Q1 2013

Base: All adults aged 16+ who use the internet at home or elsewhere (n = 2918 UK). Question: Which is the most important device you use to connect to the internet, at home or elsewhere? "Other" responses include: "netbook", "games console", "other device", "none" and "don't know".

## 4.2.7 Digital inclusion

### Three in four offline households don't intend to get an internet connection

Of the 20% of UK households who do not have access to the internet, the majority (14%) do not intend to get connected, while only 3% of respondents said they were likely to get an internet connection at home in the next 12 months. The proportion of households that do not intend to get connected has been declining since 2008, although the rate of decline appears to have reached a plateau.

In Q1 2012 4% of UK households without internet access said that it was likely that they would get the internet in the next 12 months. However, household internet access rose by only 1% between Q1 2012 and Q1 2013. This might be because some households did not fulfil their intention, or some households lost access, or a mixture of both.

**Figure 4.30 Internet take-up and intentions: 2008-2013**



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

### Adults aged 75+ and those in DE households are least intent on getting online

The demographic groups least likely to get the internet are those aged 75+ and those in DE households, of whom 63% and 25% respectively do not intend to get an internet connection at home. However, of the groups in Figure 4.31, those DE households were also the most likely (6%) to claim that they were likely to get the internet in the next 12 months.

**Figure 4.31 Internet take-up and intentions, by demographic group**



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

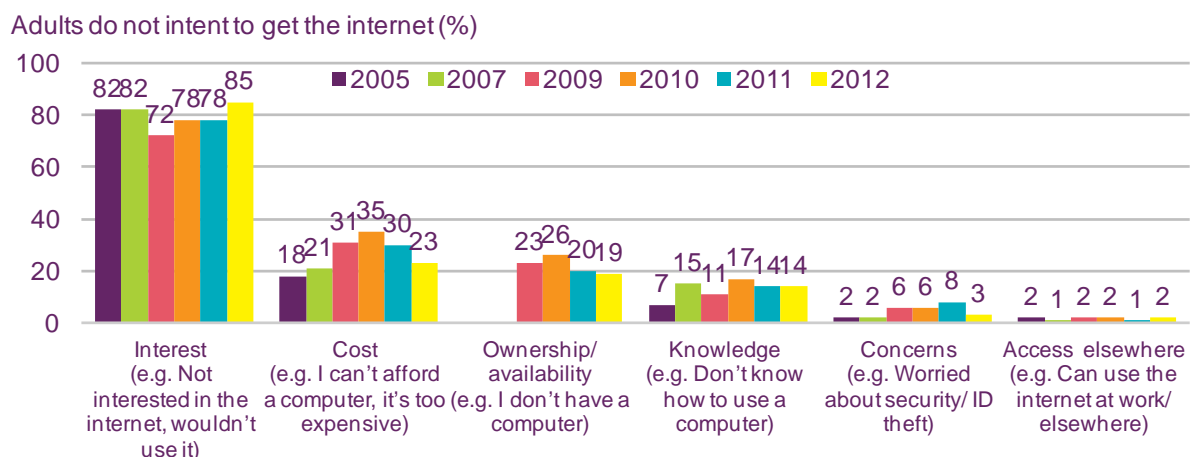
### The vast majority of offline adults cite 'lack of interest' for not being online

People who do not have the internet at home are asked in our media literacy survey why this is the case. They are unprompted, and can give as many reasons as they like. Figure 4.32 provides a summary of the reasons given by those who do not intend to get the internet at home in the next 12 months. A lack of interest is the main reason given by respondents (85%), increasing by seven percentage points between 2011 and 2012. The proportion of respondents citing cost as a factor continues to decline, with just 23% of adults claiming that this is a reason for not getting the internet, similar to the proportion who claim the internet is unavailable to them (19%).

Offline adults were also asked to give their main reason for not getting internet access at home. Seven in ten (73%) gave a main reason relating to a lack of interest, with most others giving a main reason relating to cost (12%). Concerns about the internet, as a main reason for not intending to get internet access at home, decreased in the year to 2012 from 4% to 0%<sup>77</sup>.

<sup>77</sup> Source: Ofcom research, November 2012. IN18 - And what is your main reason for not getting internet access at home? (Unprompted responses, single coded), Base: All adults aged 16+ who do not intend to get internet access at home

**Figure 4.32 Stated reasons for not intending to get home internet access in the next 12 months: 2005, 2007, 2009, 2010, 2011 and 2012<sup>78</sup>**



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

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

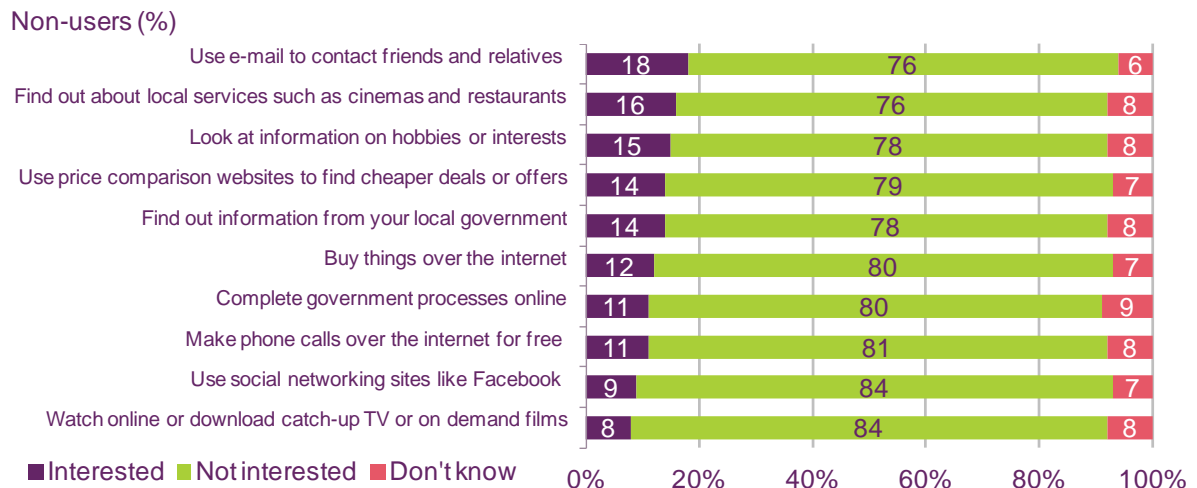
Base: All adults aged 16+ who do not intend to get internet access at home (930 in 2005, 743 in 2007, 410 in 2009, 478 in 2010, 328 in 2011, 305 in 2012).

### One in five offline adults would be interested in using email to contact friends and relatives

The majority of offline adults were not interested in participating in any of the internet activities listed in Figure 4.33. The most popular activity was using email to contact friends and relatives, in which just less than one in five (18%) offline adults said they would be interested. The least popular activity was watching catch-up television and on-demand films through services such as BBC iPlayer and Netflix, which only 8% of offline adults said they would be interested in doing online.

<sup>78</sup> The questionnaires used in the 2005 and 2007 surveys did not include non-ownership of equipment as a possible category for the responses people gave about why they did not intend to get access to the internet at home. The number of categories was extended in the 2009 survey.

**Figure 4.33 Interest in internet activities among non-users: 2012**



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

IN10A-K – I'm going to read out some different types of tasks associated with the internet, PCs or laptops, and for each one please say which of the options on the card applies to you. (Prompted responses, single coded)

Base: Adults aged 16+ who do not use the internet at home or elsewhere (542 in 2009, 628 in 2010, 454 in 2011, 424 in 2012) – significance testing shows any change between 2011 and 2012



## 4.3 Web-based content

### 4.3.1 Introduction

This section explores the kinds of content and services which people access through the internet and on the world wide web.

- Section 4.3.2 gives an **overview** of what activities UK consumers use the internet for, and the most popular websites by unique audience and time spent.
- Section 4.3.3 focuses on the **search engines** and their popularity over time and across platforms.
- Section 4.3.4 examines the take-up of **social networking** within the UK, the popularity of different social networking sites, consumption across different platforms, and the popularity of check-in services.
- Section 4.3.5 looks at the reach and audience over time of **video-sharing** websites.
- Section 4.3.6 considers the popularity **online retail** websites across laptop/desktop and mobile devices, the level of retail spend online, and how consumers use their mobile phones to shop online.
- Section 4.3.7 looks at the reach of **online news** brands across laptop/desktop and mobile platforms, as well as the frequency of accessing online news on a mobile.

### Key findings

The key findings from this section of the report are:

- **Ninety-six per cent of all internet visitors across laptop, desktop and mobile visit a Google website at least once a month.** Websites owned by Google are the most popular in the UK. They include the Google Search service, YouTube, and Google Plus. Google leads by a significant margin; second-placed Microsoft has almost ten million fewer unique visitors per month.
- **Visitors to Facebook spent more than eight hours a month browsing the site.** Of the top 100 most popular internet properties, laptop and desktop internet users spent the most time browsing Facebook sites.
- **Google and Yahoo experienced rapid growth on mobile in the 24 months to April 2013.** Google Search grew 108%, from 6.7 million to 13.9 million unique visitors, while Yahoo! search grew more than 30-fold to 1.5 million. But despite strong growth by Yahoo!, its absolute levels of unique audience are dwarfed by Google.
- **Three-quarters of 15-24 year olds use social networking sites.** Just under half (45%) of UK adults claim to have accessed social networking sites via any means in Q1 2013. Social networking was most popular with those aged 15-24 (77%) and 25-34 (69%), among women (48%) and those in C1 households (52%).
- **Almost four in ten mobile social networkers 'check-in' online from their handset.** Thirty-eight per cent of mobile phone users who access social networking services on their phone used their handset to 'check-in' or tag themselves in a status update or social network post. This proportion was up from 34% in the previous year.

- **YouTube is still growing, gaining another million users in the year to May 2013.** The unique audience of YouTube on laptop and desktop computers grew just 4% in the year to May 2013. However, the absolute growth of 1.2 million visitors per month was greater than any of the other video-sharing services analysed.
- **Average weekly internet retail sales grew 10% in the year to May 2013,** up from £528m to £582m. Sales were highest in December 2012, when £847m of retail spend was online, an increase of £128m (17.9%) on the previous high, set in December 2011.
- **More than a fifth of mobile internet users have purchased goods or services from their phone,** increasing five percentage points to 21% between April 2012 and April 2013. The most popular mobile shopping activity for mobile internet users was using their handset to find a retailer's location (25%).
- **Almost a fifth of mobile internet users access the news 'almost every day' on their handset,** up from 16% in the previous year. Fifty three per cent accessed news 'ever' in the month, up by five percentage points over the same period.

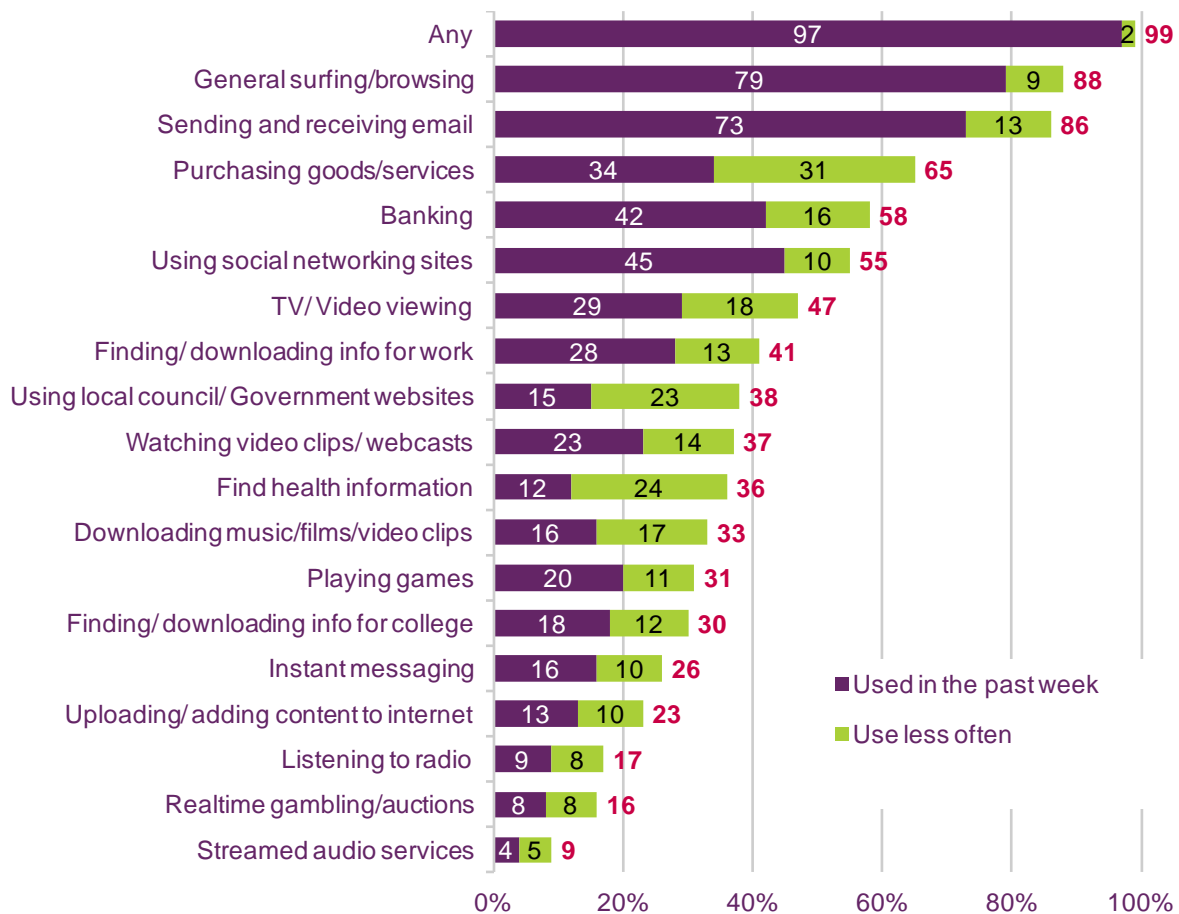
### 4.3.2 Overview

#### **After general browsing, sending and receiving email is the most popular internet activity**

Figure 4.34 provides an overview of UK adults' internet activity. The most popular activity was general surfing and browsing, which eight out of ten (79%) internet users had done in the past week. After general uses of the internet, the most popular activity was sending and receiving email, which three-quarters of internet users (73%) had done in the past week, and almost nine in ten (86%) had done less often.

A third of internet users (34%) said they had purchased goods or services over the internet in the past week, while almost two-thirds (65%) had done so less often. More than half of internet users (55%) use social networking sites, and most of these had used these sites in the past week (45%). Almost a quarter of internet users had watched video clips in the past week, and more than a third (37%) had done this less frequently.

**Figure 4.34 Claimed use of the internet for selected activities**



Source: Ofcom research, Q1 2013

Base: Adults aged 16+ with a broadband connection at home (n= 2666 UK)

QE5. Which, if any, of these do you use the internet for? NB Question wording for QE5 prior to 2013 asked about household use of the internet at home. In 2013 QE5 asked about individual use of the internet anywhere.

### **Ninety-six per cent of all internet visitors across laptop, desktop and mobile visit a Google website at least once a month**

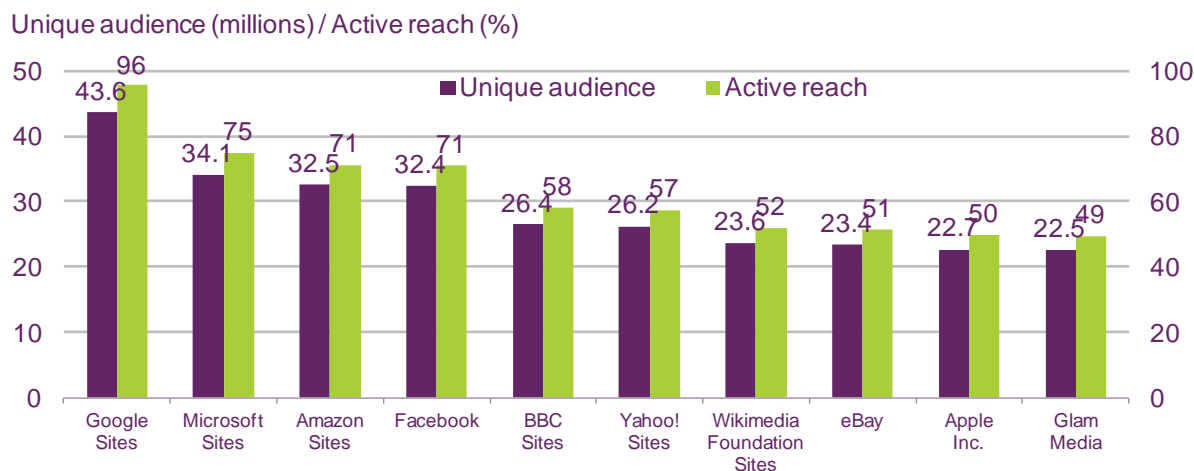
The top ten web properties for audiences across laptop, desktop and mobile devices (the digital audience) represent the key types of web content that we will examine in this section of the report. Websites owned by Google (43.6m) are the most popular, with an active reach of 96% of the UK digital audience. These include the Google Search service, YouTube – Google’s online video website, and the social networking service Google Plus. Google leads by a significant margin; second-placed Microsoft has almost ten million fewer unique visitors per month (34.1 million).

While Google has a popular range of internet services, other entities in the top ten are successful in specific internet markets. The third most popular internet property is the group of Amazon Sites (32.5 million); the most popular site is the retail website Amazon.com, but this property also includes film-streaming service LoveFilm and the film database IMDB.com. We consider Amazon and other online retailers, including eBay, in section 4.3.6.

Facebook is the fourth most popular internet property across laptop, desktop and mobile, with 32.4 million unique visitors in April 2013. This figure includes any extra unique visitors that Facebook may have gained from its acquisition of Instagram in April 2012. We examine

Facebook and other social networks in section 4.3.4. Fifth most popular entity, BBC Sites (26.4 million) includes popular news service BBC News (see section 4.3.7) as well as the BBC iPlayer service; we consider these in both the *TV and audio-visual* chapter in section 2.3.9 and the *Radio and audio* chapter in section 3.3.5.

**Figure 4.35 Top ten most popular internet properties among the digital audience**



Source: comScore MMX Multi-Platform, UK, April 2013

All sites listed are at the property level. MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network mobile browsing use.

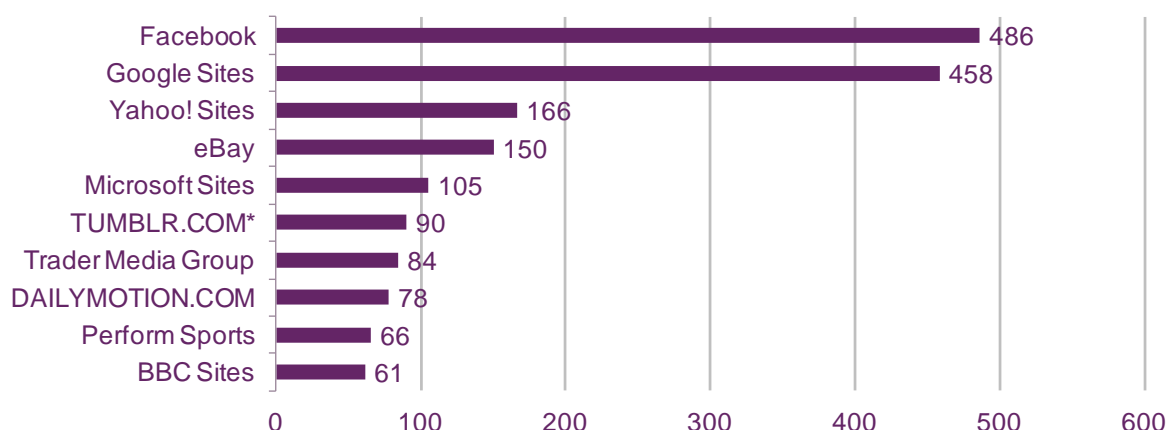
### Visitors to Facebook spend more than eight hours a month browsing the site

Of the top 100 most popular internet properties, UK internet users spent the most time browsing Facebook sites and Google sites. Visitors to Facebook spent more than eight hours a month using the social networking site and its subsidiary photo-sharing service Instagram, although total minutes spent on Instagram were less than 0.5% of the Facebook property total<sup>79</sup>. The average time spent per visitor per month visiting Google Sites was just over 7.6 hours. Visitors to the remaining properties in Figure 4.36 spent much less time per month: between an hour on BBC Sites, and 2.8 hours on Yahoo! Sites per month per visitor.

<sup>79</sup>Total minutes spent by total digital population on Facebook [P]: 15,738m; Facebook [M]: 15,557m; Instagram [M]: 73m. (Source: comScore MMX Multi-Platform, UK, April 2013).

**Figure 4.36 Top ten internet properties among the digital audience, by time spent**

Minutes per visitor per month



Source: comScore MMX Multi-Platform, UK, April 2013

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

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

### 4.3.3 Search

#### Almost nine in ten internet users visited Google Search in April 2013

Across laptop/desktop computers and mobile phones, Google Search was visited by almost nine in ten (88%) active internet users in April 2013, more than three times as many as Microsoft's Bing (24%).

All the search engines in Figure 4.37 had a greater share of the active audience on desktop and laptop computers than on mobile phones. However, popularity on fixed platforms does not imply a similar position between rivals on mobile. While Bing was the second most popular search engine on laptop and desktop computers (visited by approximately one in four internet users), it was the least popular search engine analysed for mobile internet users in April 2013 (1% of mobile audience reach).

It is likely that the reach of search engines on mobile is influenced by the default setting of a smartphone's browser. For smartphones running Android (developed by Google and the Open Handset Alliance) or iOS (Apple's iPhone, iPad and iPod Touch operating system) the default search engine is Google. These two operating systems make up almost four-fifths (79%)<sup>80</sup> of all smartphones in use. Bing is the default search engine for smartphones running Windows operating systems, which have a much smaller share of the smartphone market<sup>81</sup>.

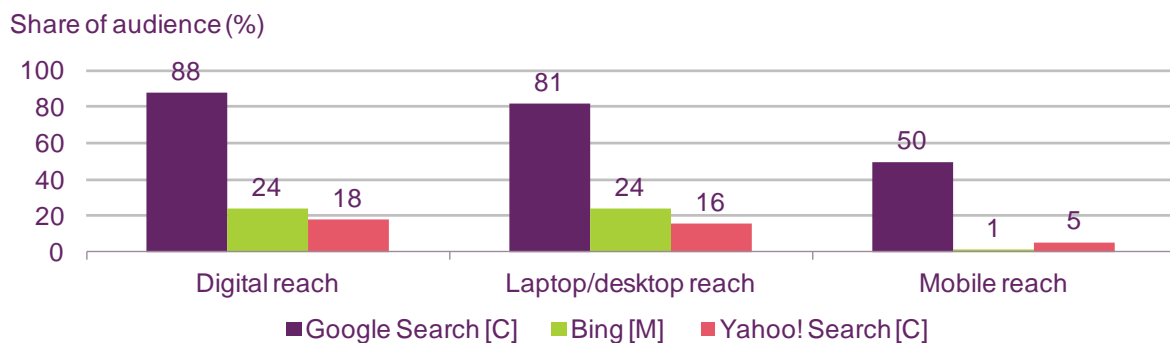
Figure 4.37 shows the three leading internet search engines. The technology powering Yahoo! Search and Bing is the same. In 2009, Yahoo! and Microsoft announced a ten-year deal in which Yahoo! Search will be powered by Bing but retain the Yahoo! user interface and design. Yahoo! will retain 88% of search advertising revenues earned from Yahoo! Search and have the right to sell adverts on some Microsoft sites<sup>82</sup>.

<sup>80</sup> Android 50%, Apple 29% Source: comScore MobiLens, UK, three-month average ending May 2013.

<sup>81</sup> Microsoft Operating Systems 5% Source: comScore MobiLens, UK, three-month average ending May 2013

<sup>82</sup> "Microsoft and Yahoo seal web deal", BBC News, <http://news.bbc.co.uk/1/hi/business/8174763.stm>

**Figure 4.37 Active reach of search websites across digital, laptop/desktop and mobile audiences: April 2013**

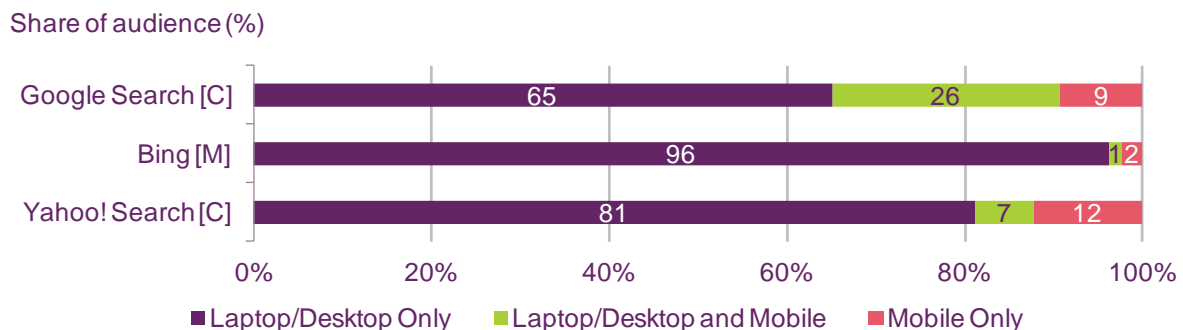


Source: comScore MMX Multi-Platform, UK, April 2013  
 Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, and on-network mobile browsing.

**A quarter of Google Search users visit it using both laptops/desktops and mobile phones**

Google Search had the greatest overlap of audiences between laptop/desktop computers and mobile phones (26%) in April 2013. Strong overlap between platforms might be a result of consumers’ desktop/laptop habits extending onto mobile platforms, or Google Search’s success in being the default search engine across a number of smartphone operating systems. Figure 4.38 shows that Yahoo! Search had the largest mobile-only audience share, with more than one in ten unique visitors exclusively visiting it from a mobile phone.

**Figure 4.38 Overlap of audiences between platforms: April 2013**



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

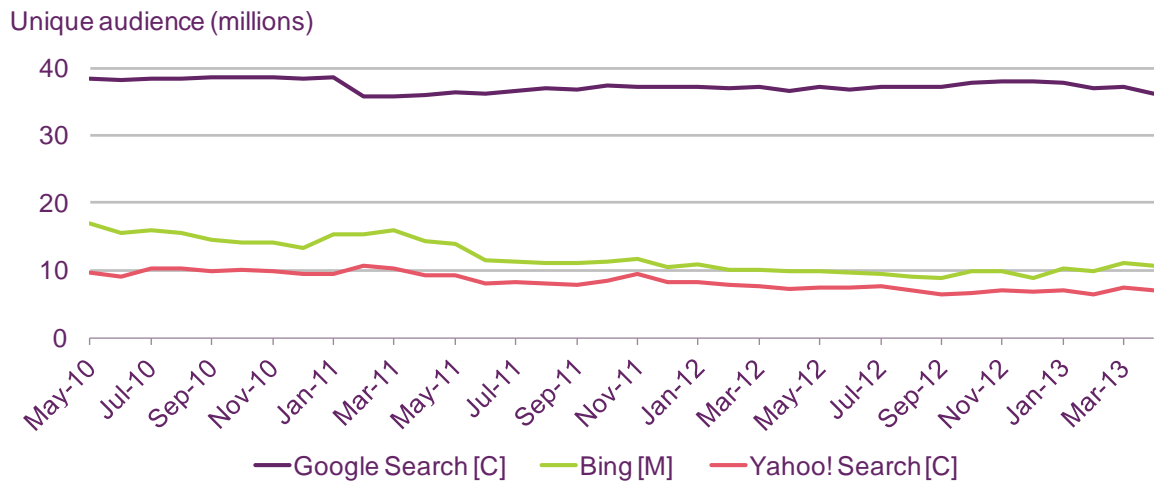
**Google Search unique audience is flat, while competitors experience 30% declines**

Google Search’s unique audience has grown just 1.4% since February 2011, peaking at 38.0 million in November 2012 before falling slightly to 36.2 million in April 2013. In the same period the unique audiences of Bing and Yahoo! Search fell by 31% to 10.5 million and by 34% to 7.0 million respectively, although the most recent months show a levelling-off of this decline.

The relatively flat unique audience of Google Search and the declines in audiences of rival search engines may be due to the growing proportion of traffic from mobile devices and the substitution of search activity from laptop and desktop computers to mobile phones (see

Figure 4.40). This would have a greater effect on Bing and Yahoo! Search, as they are less popular on mobile than on laptop and desktop computers.

**Figure 4.39 Laptop and desktop unique audience of selected search websites: May 2010 to Apr 2013**

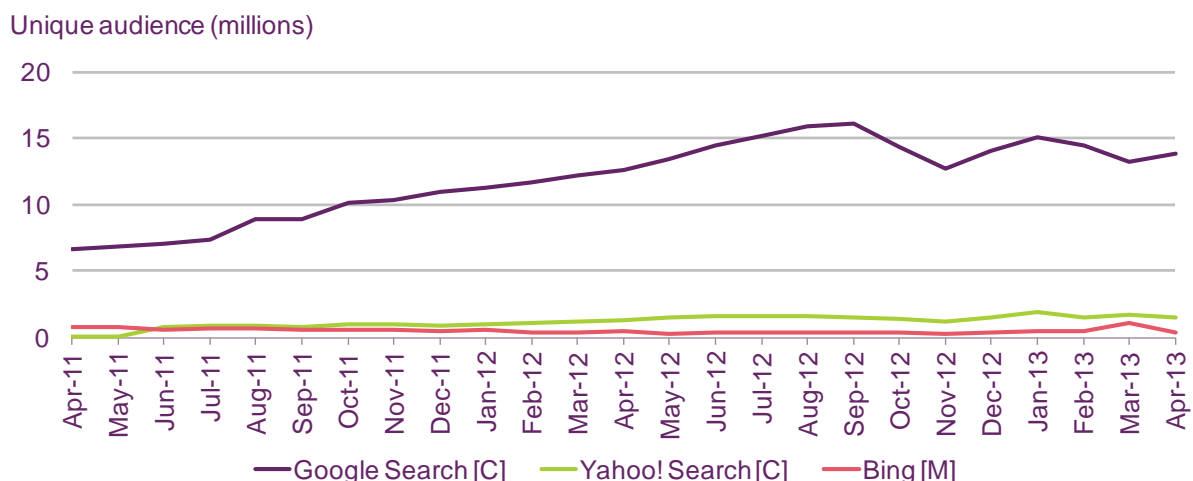


Source: comScore MMX, UK, home and work panel, May 2010 to April 2013  
 Note: Change in methodology in February 2011

**Google and Yahoo experienced rapid growth on mobile in the 24 months to April 2013**

Google Search and Yahoo! Search both experienced strong growth in the two years to April 2013. Google Search grew 108%, from 6.7 million to 13.9 million unique visitors, while Yahoo! Search grew more than 30-fold to 1.5 million. For both search engines, growth was strongest in the first 12 months, followed by 10-18% growth in the second 12 months. Over the same period Bing’s mobile unique audience halved, from 776,000 to 340,000. But despite strong growth by Yahoo!, its absolute levels of unique audience are dwarfed by Google.

**Figure 4.40 Mobile unique audience of selected search websites: Apr 2011 to Apr 2013**



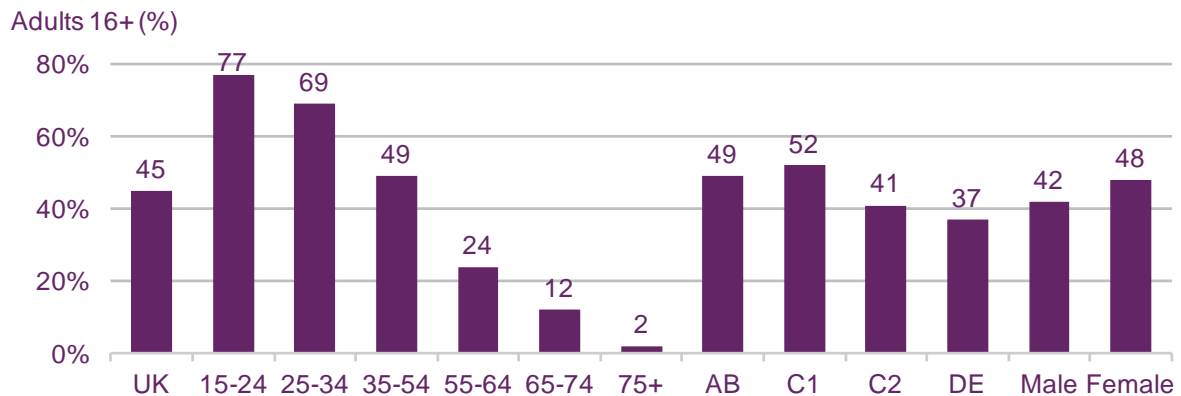
Source: comScore GSMA MMM, UK, browser access only, on network, April 2011 to April 2013

### 4.3.4 Social networking

#### Three-quarters of 15-24 year olds use social networking sites

Just under half (45%) of UK adults claimed to have accessed social networking sites via any means in Q1 2013. Social networking was most popular with those aged 15-24 (77%) and 25-34 (69%), among women (48%) and those in C1 households (52%). By contrast, only 2% of those aged 75 or more and 37% of those from DE households claimed to use social networking sites. This can be partly explained by the lower levels of internet access among these demographics.

**Figure 4.41 Proportion of adults who access social networking sites at home**



Source: Ofcom consumer research Q1 2013

Base: All adults aged 16+ (3750 Q1 2013) QE5. Which, if any, of these do you use the internet for?  
NB Question wording for QE5 prior to 2013 asked about household use of the internet at home. In 2013 QE5 asked about individual use of the internet anywhere.

#### Twitter is equally as popular among laptop/desktop internet users as it is on mobile

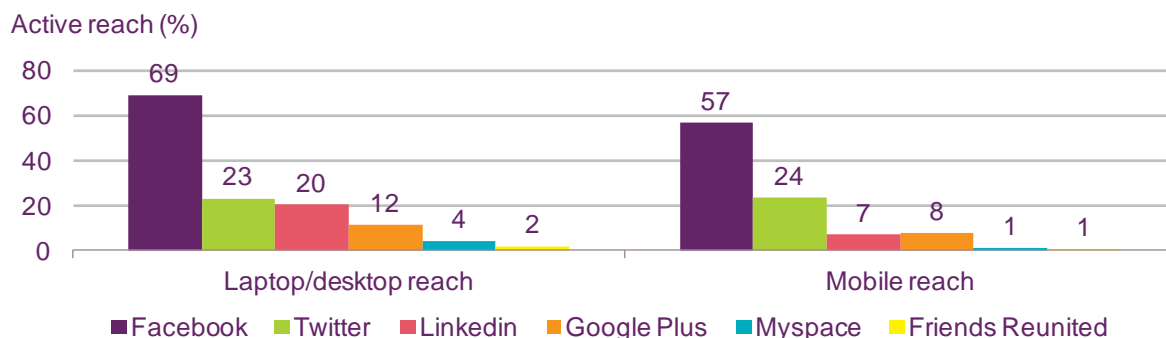
Facebook was the most popular social networking service among laptop and desktop internet users, with seven in ten users (69%) visiting it in April 2013. However, other social networking sites Twitter (23%) and LinkedIn (20%) reached just a fifth of active internet users.

Among mobile internet users almost six in ten (57%) claimed to have used Facebook in April 2013, and a quarter had used Twitter (24%). Twitter is the only social network featured in Figure 4.42 which had as large an audience on mobile as it did on laptop and desktop computers. This may be because Twitter originated as a service where users could send and receive updates from their mobile phones by SMS.

Conversely, LinkedIn was used by just 7% of mobile internet users, less than half the reach on laptop and desktop computers. One reason for this might be that as a professional network, rather than a social network, LinkedIn users are less likely to use the service on their personal mobile phones, preferring to use it in the workplace.



**Figure 4.42 Active reach of social networking services across laptop/desktop and mobile audiences: April 2013**



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

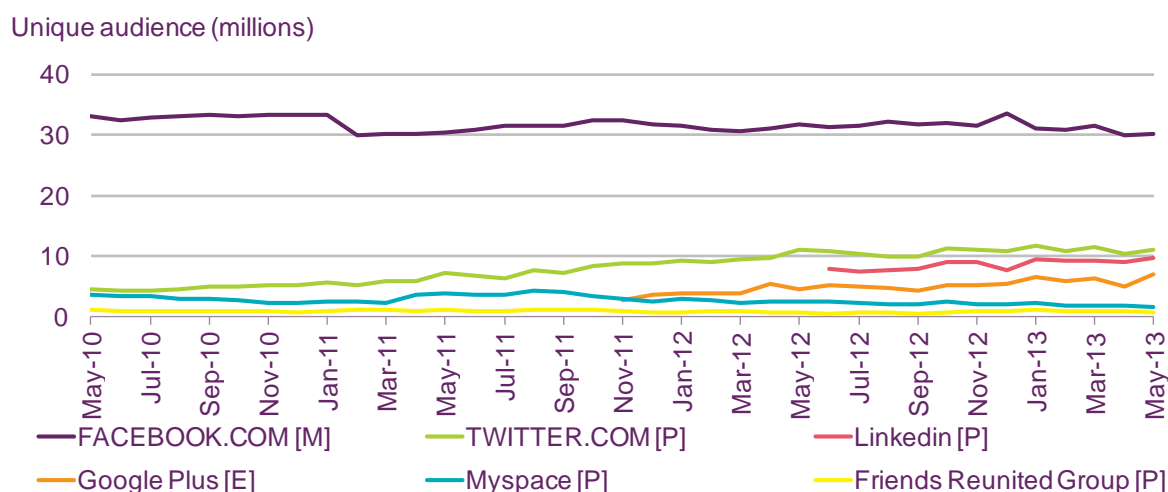
Note: Entities cited from comScore MMX Multi-Platform: FACEBOOK.COM [M], TWITTER.COM [P], LinkedIn [P], Google Plus [E], MySpace [P], Friends Reunited Group [P] and includes laptop/desktop webpage browsing and laptop/desktop video streams.

**Google Plus grows 53% in the year to May 2013, but Facebook maintains its position as the leading social network**

In the twelve months to May 2013 the fastest growing social network among laptop and desktop internet users was Google Plus, rising 53% from 4.5 million to just under 7 million unique visitors. Year on year, Facebook’s unique audience has declined by 5% while Twitter’s has remained broadly flat, declining by just 1%. These small declines are likely to be because internet users are increasingly using their mobile phones rather than a laptop or desktop computer to access social networking sites (see Figure 4.43 below).

LinkedIn gained 1.7 million monthly users in the 12 months to May 2013. MySpace has continued to decline from its peak of 4.4 million in August 2011, falling 37% in the year to May 2013.

**Figure 4.43 Unique audience of selected social networking websites on laptop/desktop computers: May 2010 to May 2013**



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

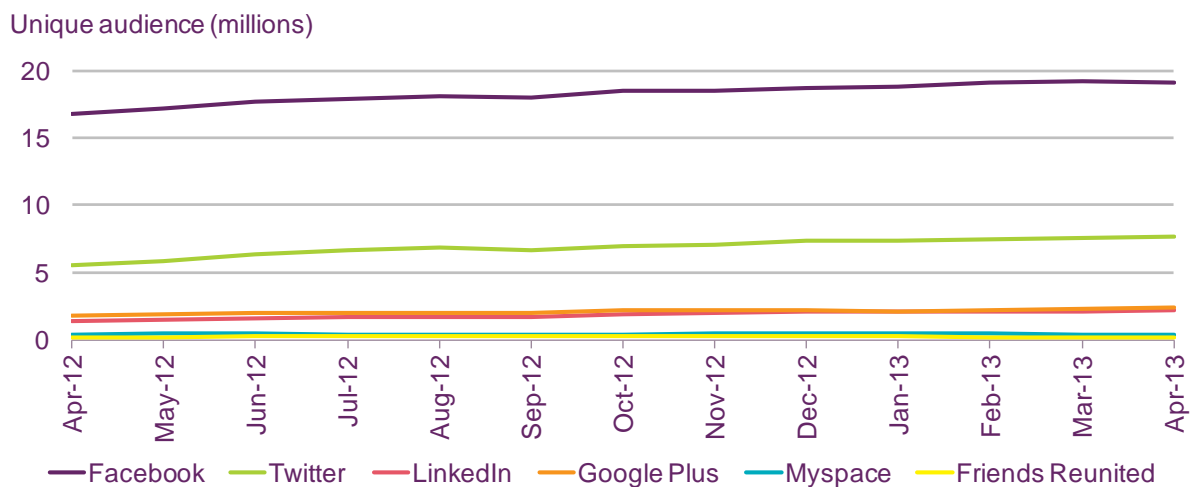
Note: Change of methodology in February 2011

## Facebook gained 2.3 million mobile users in the year to April 2013

In the year to April 2013, 19.1 million mobile phone users claimed to use Facebook on their mobile handset, a rise of 14% and the largest absolute growth (2.3 million) of any of the social networks shown in Figure 4.44. Twitter grew slightly less in absolute terms, up by 2.1 million (39%) to just less than 7.7 million. In May 2013, Facebook announced its 'User First, Mobile Best' strategy, which commentators argue aims to take advantage of the increasing trend among its user base to access the service through their mobile phones<sup>83</sup>.

The fastest-growing of these social networking sites on mobile phones was LinkedIn, up 61% to 2.2 million, and Google Plus, up 32% to 2.4 million. However, on mobile as on laptop and desktop, MySpace's unique audience declined, down 8% to just less than 400,000 mobile users in April 2013.

**Figure 4.44 Unique audience of selected social networking websites on mobile phones: Apr 2012 to Apr 2013**



Source: comScore MobiLens, UK, April 2012 to April 2013

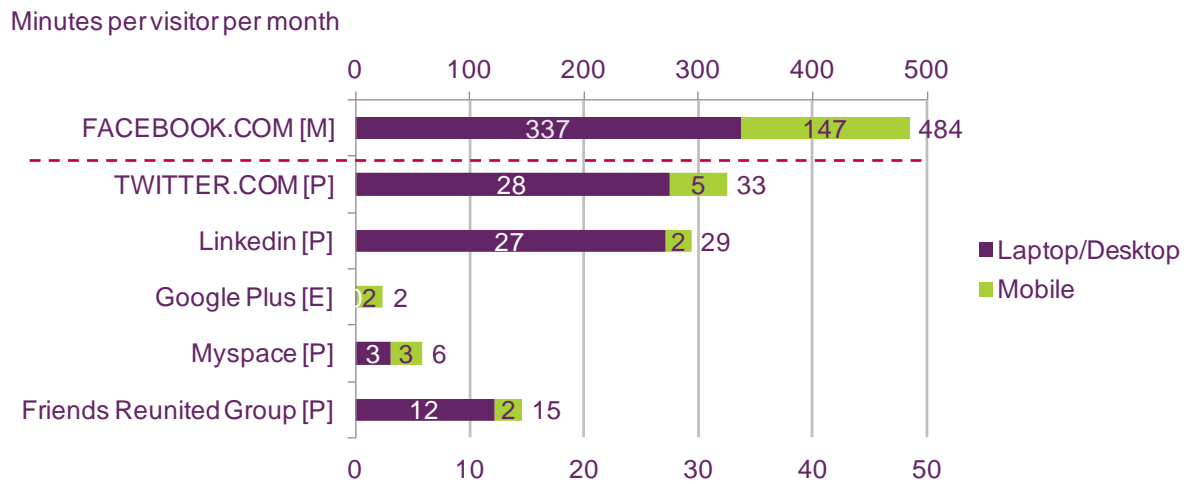
Base: Mobile internet users 13+

## Facebook users spent more than 5.5 hours on the site using a laptop or desktop computer, and at least a further 2.5 hours using a mobile phone.

Of the social networking sites featured in Figure 4.45, UK internet users spent the most time per visitor per month on Facebook. Approximately 5.6 hours was spent per visitor per month browsing pages on Facebook using a laptop or desktop computer, and a further 2.5 hours was spent on Facebook using a mobile phone. Visitors to Twitter spent the second greatest amount of time browsing (33 minutes) the majority of which was on a laptop or desktop computer (28 minutes). Next most popular was LinkedIn (29 minutes) whose visitors also spent most time visiting from a laptop or desktop computer (27 minutes).

<sup>83</sup> "Facebook fleshes out 'mobile first' strategy", Computer World UK  
<http://www.computerworlduk.com/news/mobile-wireless/3433126/facebook-fleshes-out-mobile-first-strategy/>

**Figure 4.45 Time spent on social networking sites across laptop, desktop and mobile**

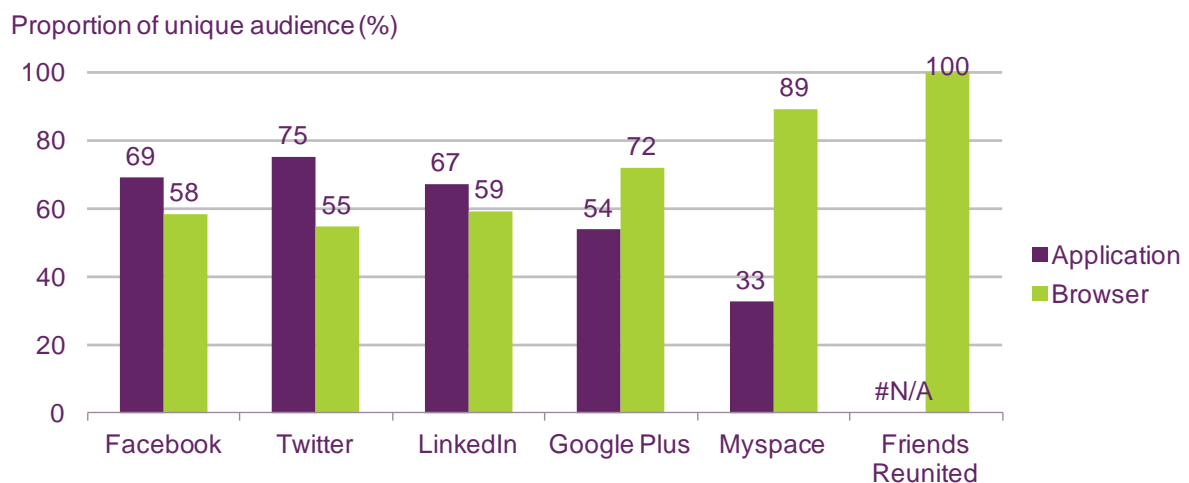


Source: comScore MMX Multi-Platform, UK, April 2013,

Note: Time spent online is a measure of time spent laptop/desktop webpage browsing and on-network mobile webpage browsing. It excludes time spent accessing audio content, and excludes mobile applications on mobile phones.

The time spent browsing on a mobile phone (Figure 4.45) only shows access to a social network’s website through the mobile browser; it does not include time spent using a mobile application to access a social network. Therefore the time spent in Figure 4.45 is likely to be an underestimate of the total time spent on a social network using a mobile phone. Figure 4.46 indicates that more mobile users of Facebook, Twitter and LinkedIn used an application to access these social networks than used the mobile browser. Twitter had the highest proportion of its unique audience visit through the mobile app, so it is most likely to be affected by the underestimate in Figure 4.45 above.

**Figure 4.46 Application and browser access to social networks on a mobile phone**



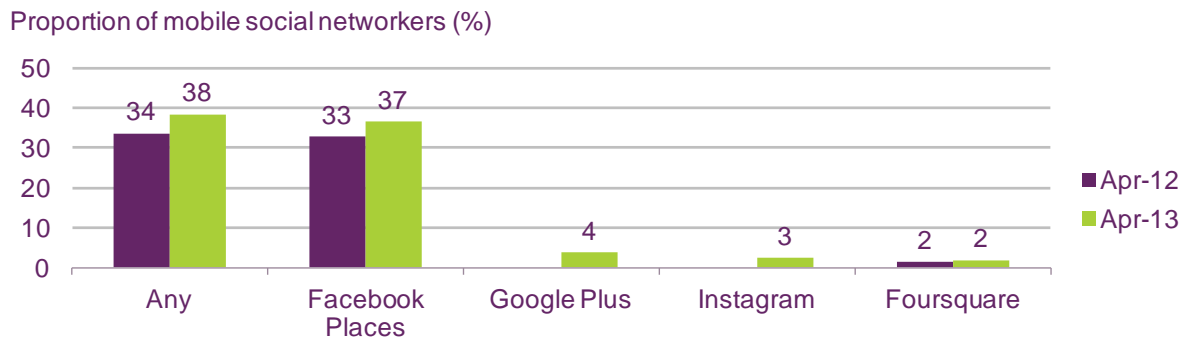
Source: comScore MobilLens, UK, three-month average ending April 2013

**Almost four in ten mobile social networkers ‘check-in’ online from their handset**

Thirty-eight per cent of mobile phone users who access social networking services on their phone also used their handset to ‘check-in’, up from 34% in the previous year. A check-in service uses the GPS functionality of a smartphone to suggest locations that a user can choose to tag themselves in when updating their status or submitting a post. Some services,

such as Foursquare, are used exclusively as a service for submitting a user's location, while for other services, such as Facebook Places and Google Plus, 'checking-in' is a feature of existing social networks.

**Figure 4.47 Use of check-in services by mobile social networkers**



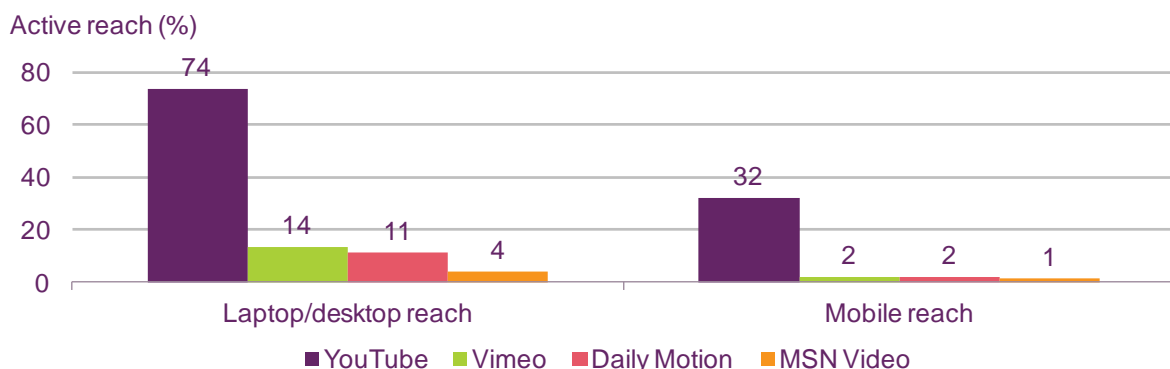
Source: comScore MobiLens, UK, three-month averages ending April 2012 and April 2013  
 Base: UK mobile phone users aged 13+ who used a social network 'ever' in a month

### 4.3.5 Online video

#### YouTube is less than half as popular on mobile as it is on laptop and desktop computers

Three-quarters (74%) of laptop and desktop internet users visited YouTube, the most popular video sharing website of those listed in Figure 4.48. Rival video-sharing websites Vimeo (14% active reach), DailyMotion (11%) and MSN Video (2%) were far less popular. The pattern of popularity was repeated on mobile, although only 32% of mobile internet users claimed to have watched YouTube on their handset, and between 1% and 2% claimed to use other video-sharing services. While Figure 4.48 does not differentiate between whether mobile users used a WiFi or mobile data connection to use these services, it is likely that the greater bandwidth (and subsequently cost) required to consume video, compared to text or static images, may deter some mobile internet users from using these services.

**Figure 4.48 Reach of online video services on laptop, desktop and mobile: April 2013**



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

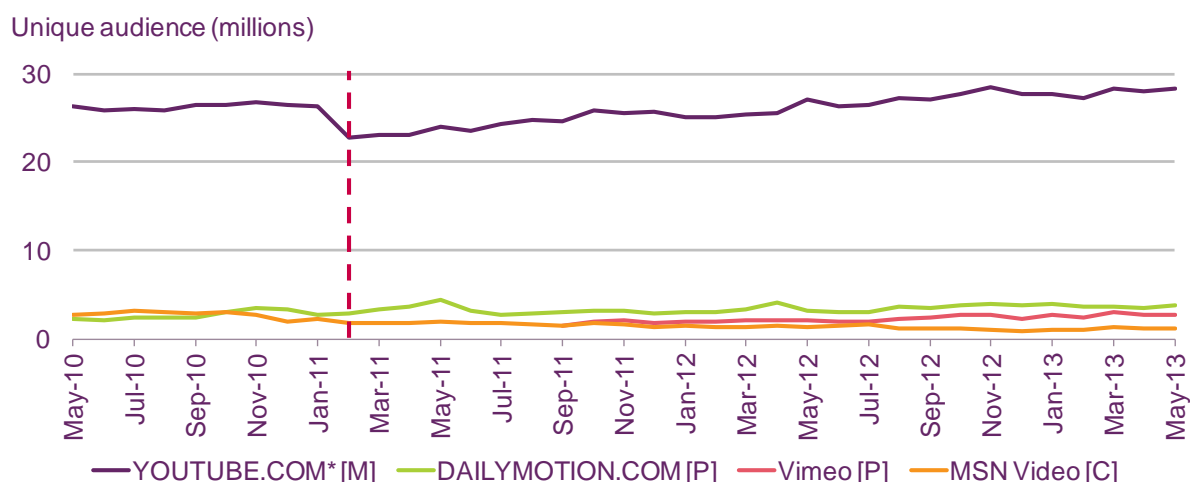
Note: Entities from comScore MMX MP were YOUTUBE.COM\* [M], Vimeo [P], DAILYMOTION.COM [P], MSN Video [C] and include laptop/desktop browsing and laptop/desktop video streams.

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

## YouTube is still growing, gaining another million users in the year to May 2013

The unique audience of YouTube on laptop and desktop computers grew just 4% in the year to May 2013. However, the absolute growth of 1.2 million visitors per month was greater than any of the other video-sharing services in Figure 4.49. DailyMotion grew 17% year on year to 3.7 million, and Vimeo grew 30% to 2.7 million. But the audience of MSN Video has declined, falling 16% to 1.1 million in the year to May 2013.

**Figure 4.49 Unique audience of selected online video websites on laptop and desktop computers: May 2010 to May 2013**



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

Note: Data before February 2011 not comparable because of a change in methodology.

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

### 4.3.6 Online retail

#### Average weekly internet retail sales grew 10% in the year to May 2013

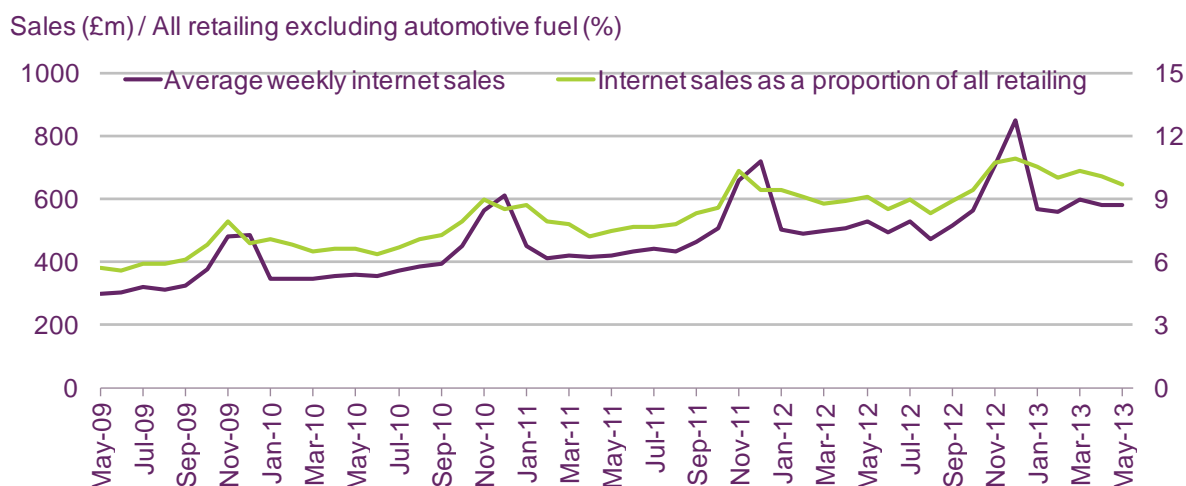
The Retail Sales Index (RSI) by the Office for National Statistics provides an estimate of how much was spent online through retailers across all store types in Great Britain. The RSI “covers internet businesses whose primary function is retailing but also covers internet retail sales by other British retailers, such as online sales by supermarkets, department stores and catalogue companies”<sup>84</sup>.

Average weekly internet retail sales grew 10.3% year on year to May 2013, up from £528m to £582m, continuing a trend of steady annual growth punctuated by peaks during the Christmas shopping season. Sales were highest in December 2012, when £847m of retail spend was online, an increase of £128m (17.9%) on the previous high, set in December 2011.

Furthermore, Figure 4.50 shows that internet sales as a proportion of all retailing (excluding automotive fuel) grew 0.6 percentage points between May 2013 and May 2012. Internet sales as a proportion of all retailing follows a similar seasonal pattern as absolute sales, and peaked in December 2012 at 10.9%. Until recently, internet share of sales peaked before absolute sales, suggesting that consumers are likely to do their online shopping more in advance of Christmas than their shopping at high street retailers. This lag might be attributable to the time required for purchases to be delivered before Christmas.

<sup>84</sup> “A Quick Guide to the Retail Sales Index”, Office for National Statistics, <http://www.ons.gov.uk/ons/guide-method/method-quality/specific/economy/retail-sales/rsi-quick-guide.pdf>

**Figure 4.50 GB internet retail sales**



Source: Office for National Statistics, Retail Sales Statistical Bulletin, May 2009 to May 2013

<http://www.ons.gov.uk/ons/rel/rsi/retail-sales/may-2013/rft-rsi-tables-may-2013.xls>

Note: This data are for Great Britain only and exclude Northern Ireland, the Isle of Man, and the Channel Islands.

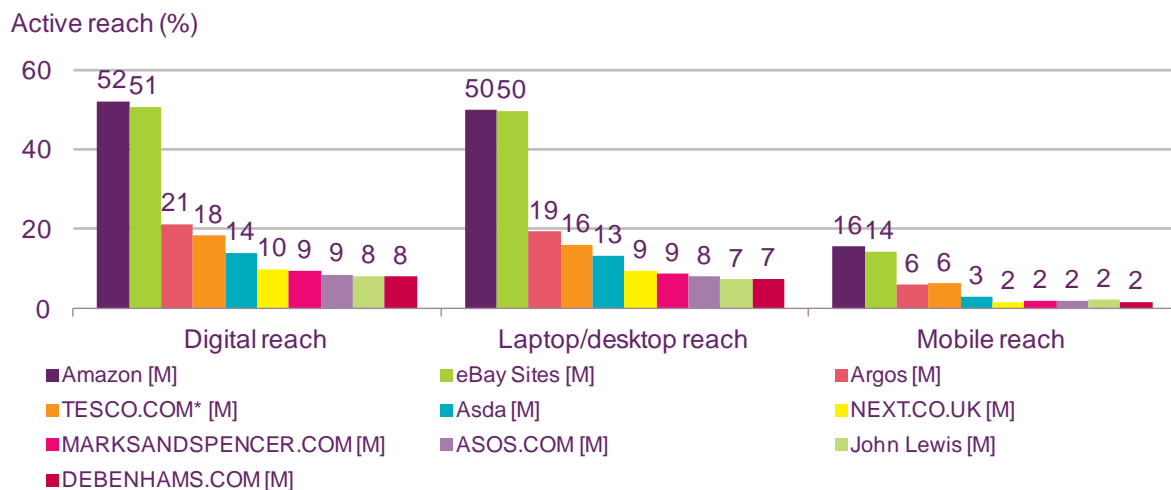
### Half of the online population visit Amazon and eBay

More than half of the online population across mobile, laptop and desktop computers visited Amazon (52%) and eBay (51%) in April 2013. Among the online retail websites featured in Figure 4.51, the nearest competitor, Argos, had less than half the reach (21%) of the top two. However, it is worth noting that both Amazon and eBay are online-only retailers, while all of the remaining websites except ASOS also have a high street presence. While the online reach of these high street retailers may not be as great as Amazon and eBay, their online and in-store reach may be.

Online retail websites are less popular among mobile-only internet users, although Amazon and eBay still lead, with 16% and 14% reach respectively. Similarly, nearest rivals Tesco and Argos had less than half the reach (6%) of the top two. However, mobile reach, shown in Figure 4.51, excludes mobile users who only use the services of these online retailers through a mobile app. Alternative consumer research from comScore suggests that including visits from online retailers' mobile applications increases the mobile internet reach of Amazon to 24% of users, and of eBay to 16%<sup>85</sup>.

<sup>85</sup> Retail brands by browser and application, comScore MobiLens, April 2013, mobile internet users 13+

**Figure 4.51 Active reach of selected online retailers, by platform: April 2013**



Source: comScore MMX Multi-Platform, UK, April 2013.

Note: Please note MMX Multi-Platform includes laptop/desktop browsing, laptop/desktop video streams, on-network mobile browsing use.

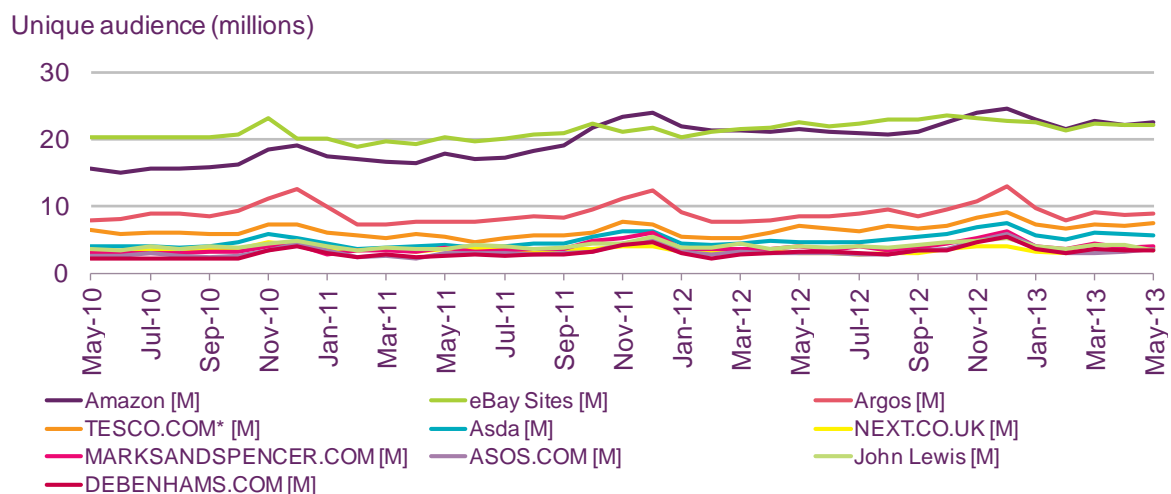
### Amazon overtakes eBay to become the UK’s most-visited online retailer

Year on year, Amazon’s laptop and desktop computer audience grew by one million unique visitors per month in May 2013, overtaking eBay to become the most popular online retailer featured in Figure 4.52. In the same period, eBay’s unique audience shrank by half a million unique visitors per month, leaving only 350,000 unique visitors a month separating the two most popular online retailers.

The fastest growing audiences among the online retailers were fashion retailer Next.co.uk (21%), supermarket Asda (20%), and online-only fashion retailer ASOS.com (19%). Apart from eBay the only online retailer to experience a fall in audience was department store John Lewis, down 16% year on year.

Visits to online retailers were clearly cyclical throughout the year, with unique audiences peaking during the Christmas period and then returning to lower levels.

**Figure 4.52 Unique audience of selected online retailers on laptop and desktop computers: May 2010 to May 2013**



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

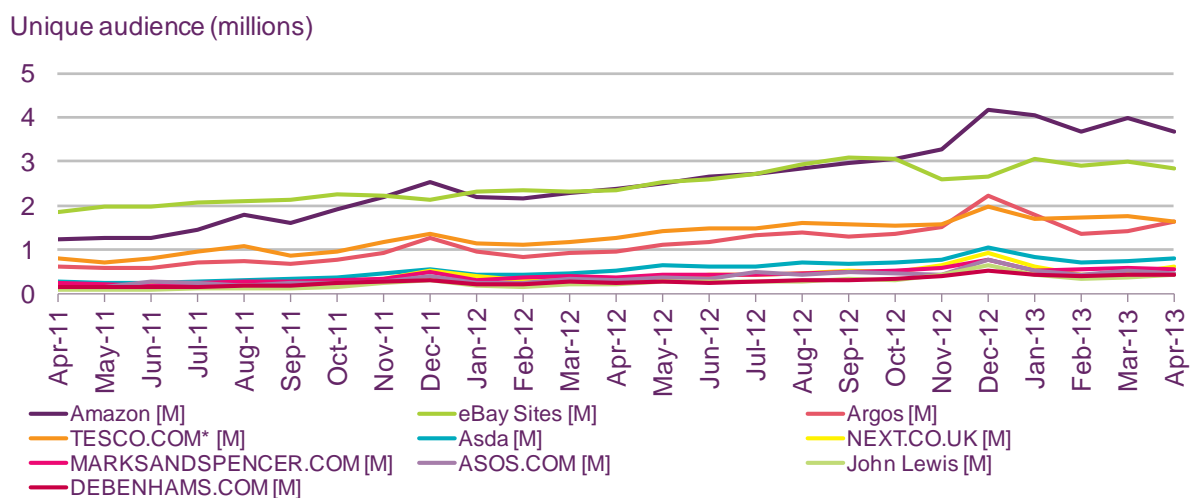
## Mobile audiences are growing for online retailers in the UK

Amazon had the greatest absolute growth in mobile audience among the online retailers in our analysis, growing by 1.3 million year on year in April 2013 to become the most popular online retailer on mobile.

Furthermore, mobile shopping appears to be growing in popularity. Mobile unique audiences across all online retailers analysed grew between 21% (eBay) and 106% (John Lewis) during the year to April 2013, and the Christmas peak in 2012 was more pronounced than in 2011, across a number of retailers.

Figure 4.53 indicates growing unique audiences of online mobile retail websites; however, it does not reflect all mobile internet user behaviour. The unique audiences in Figure 4.53 exclude users of retailers' mobile applications, through which mobile audiences may browse retailers' products and make purchases. This appears to have had the greatest impact on eBay, which launched a television advertising campaign in late September featuring the eBay mobile app<sup>86</sup>. Unlike competitors' mobile browser audiences (which peaked during the Christmas period) eBay's browser-only unique audience fell during November and December 2012, before returning to previous levels in January 2013. Consumer research from comScore MobiLens suggests that users of eBay continued to rise during this period<sup>87</sup>, while data from comScore GSMA MMM states that users of the mobile application grew by 0.9 million monthly users<sup>88</sup>. It is likely, therefore, that consumers switched away from using their mobile browsers to visit eBay, using the eBay mobile application instead.

**Figure 4.53 Mobile unique audience of selected online retailers: Apr 2011 to Apr 2013**



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

## More than a fifth of mobile internet users have purchased goods or services using their phone

The proportion of mobile internet users who have purchased goods or services from their handset increased by five percentage points to 21% between April 2012 and April 2013. The

<sup>86</sup> "eBay launches mobile shopping TV campaign", 25 September 2012, <http://www.ebay-mediacentre.co.uk/pressrelease/3861>

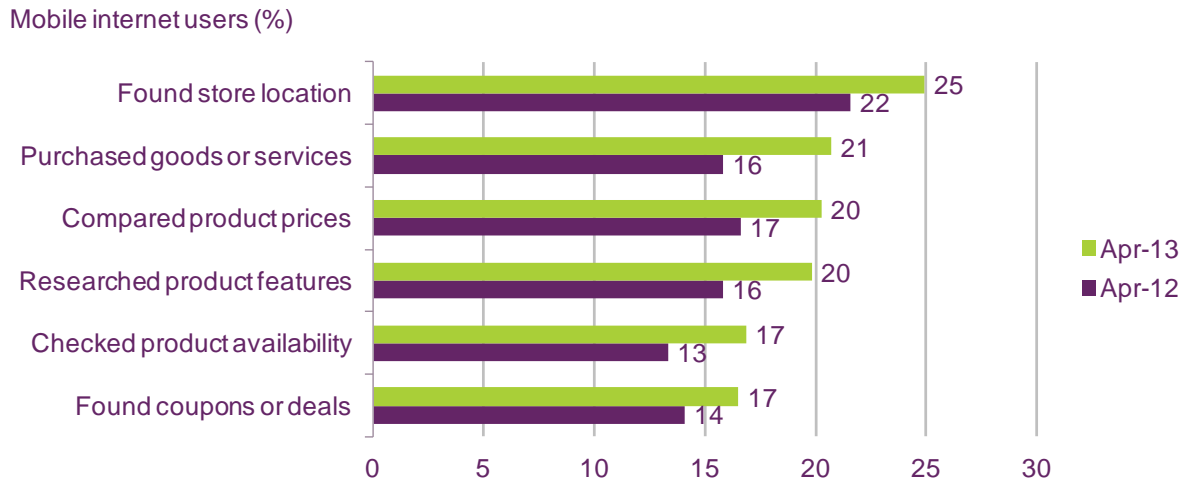
<sup>87</sup> Growing from 4.1 million to 5.3 million users during the Christmas period (comScore MobiLens, UK, mobile users 13+, September to December 2012),

<sup>88</sup> eBay (mobile app) [M] unique audience: 1,266,537 (comScore GSMA MMM, UK, on network, September 2012) and 2,145,396 (comScore GSMA MMM, UK, on network, January 2013).



most popular activity among mobile internet users, shown in Figure 4.54, was using their handset to find a retailer's location (25%) while the least popular was using their phone to find coupons or deals (17%). A fifth of mobile internet users (20%) used their handset to compare product prices and to research product features.

**Figure 4.54 Mobile retail activities conducted by mobile internet users**

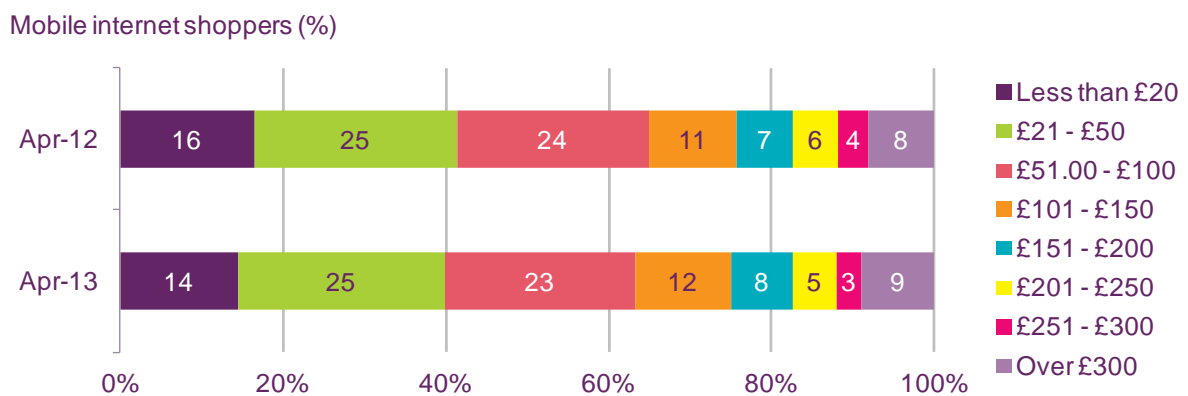


Source: comScore MobiLens, UK, three-month averages ending April 2013 and April 2012  
 Base: mobile internet users aged 13+

**Mobile internet shoppers were most likely to spend between £21 and £50 per month**

The majority of mobile internet shoppers spent up to £100 per month on goods and services purchased through their mobile phone in April 2013 (Figure 4.55). A quarter of mobile internet shoppers (25%) spent between £21 and £50, the most popular interval of spend, while less than a tenth (9%) of shoppers spent more than £300 in a month. Furthermore, while the proportion of mobile internet users who purchase goods and services online through their mobile phone increased between April 2012 and April 2013 (see Figure 4.54 above), the level of spend has not changed significantly.

**Figure 4.55 Amount spent on goods and services among mobile internet shoppers**



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

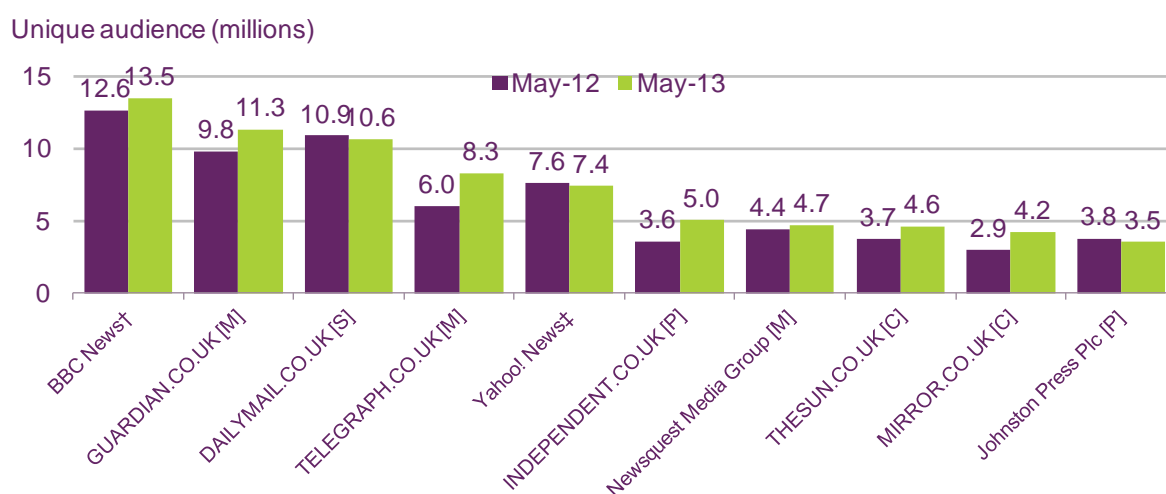
### 4.3.7 Online news

#### 13.5 million laptop and desktop internet users visit the BBC News website

The most popular news website among laptop and desktop internet users is BBC News, with 13.5 million unique visitors in May 2012, up from 12.6 million in May 2012. The Guardian was the second most popular website, gaining 1.5 million unique visitors in the year to May 2013 and overtaking The Daily Mail, which dropped to third place with 10.6 million unique visitors.

The unique audience of almost all websites analysed increased in the year to May 2013. In addition to The Daily Mail, the exceptions were online-only news website Yahoo! News (down 0.2 million) and regional newspaper publisher Johnston Press Plc (down 0.3 million).

**Figure 4.56 Active reach of selected news websites on laptop and desktop computers**



Source: comScore MMX, UK, home and work panel, May 2012 and May 2013

† The unduplicated audience of BBC News [C] and BBC.co.uk Home Page [C]

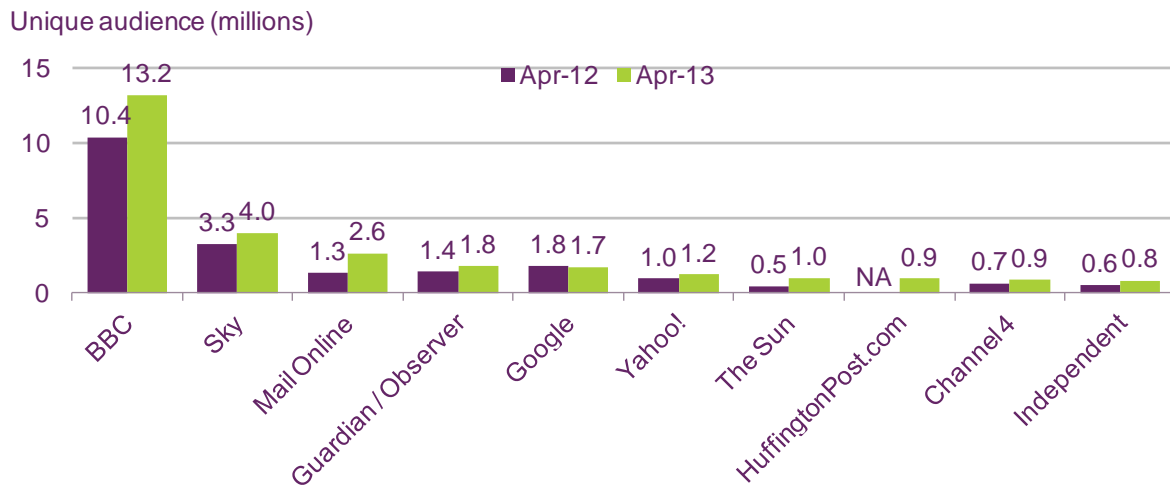
‡ The unduplicated audience of Yahoo! News [S] and Yahoo! Finance [S]

#### The BBC is as popular among mobile internet users as it is among laptop/desktop internet users

The BBC had a unique audience of 13.2 million for world/national/local news on mobile in April 2013, the largest among the news brands analysed in Figure 4.57, and only 0.3 million users less than on laptop and desktop computers. Of the news brands featured in both Figure 4.56 and Figure 4.57, the BBC was the only brand to achieve similar audience sizes.

The BBC had the greatest absolute increase in unique audience between April 2012 and April 2013, gaining a further 2.8 million users. Mail Online, the online brand for The Daily Mail, doubled its unique audience to 2.6 million in the twelve months to April 2013, while new online-only news brand the Huffington Post established a mobile internet audience of 0.9 million ahead of established brands like broadcaster Channel 4 (0.9 million) and national newspaper The Independent (0.8 million).

**Figure 4.57 Unique audience of selected news brands on mobile for world/ national/ local news**



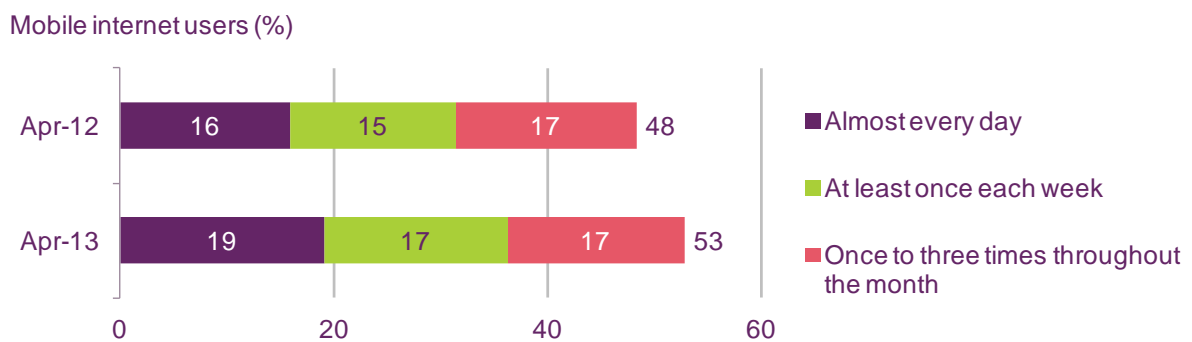
Source: comScore MobiLens, UK, three-month averages ending April 2013 and April 2012  
 Base: mobile internet users aged 13+

**Almost a fifth of mobile internet users access the news ‘almost every day’ on their handset**

Almost a fifth (19%) of mobile internet users accessed news through their mobile almost every day in April 2013, up from 16% in April 2012. Fifty-three per cent accessed news ‘ever’ in the month, up five percentage points in the same period.

The frequency with which mobile internet users access news through their mobile might be increasing for a number of reasons. News providers, including those brands featured in Figure 4.57, have mobile-friendly versions of their websites which aid navigation and consumption for mobile internet users. Furthermore, some news brands have released mobile applications that allow users to download content to their smartphone and read it when they do not have a cellular or WiFi internet connection.

**Figure 4.58 Frequency of accessing news among mobile internet users**



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