

# ICMR 5 – slide pack

## Figure 5.1

### Internet and web-based content: key international statistics

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Online universe (m)*	39.6	37.0	52.0	30.9	197.4	73.7	15.9	23.5	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Fixed broadband connections per 100 HH†	85	88	71	55	75	85	72	70	91	70	57	108	101	32	45	6	42	0
Mobile broadband connections per 100 population‡	8	6	10	13	8	10	26	4	7	23	11	3	5	3	13	0	1	3
Internet access via a mobile phone(%)‡	55	47	53	75	46	56	60	74	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	79	n/a

Source: IHS / Industry data / Ofcom / comScore

\*comScore MMX, August 2014, home and work panel, persons 15+

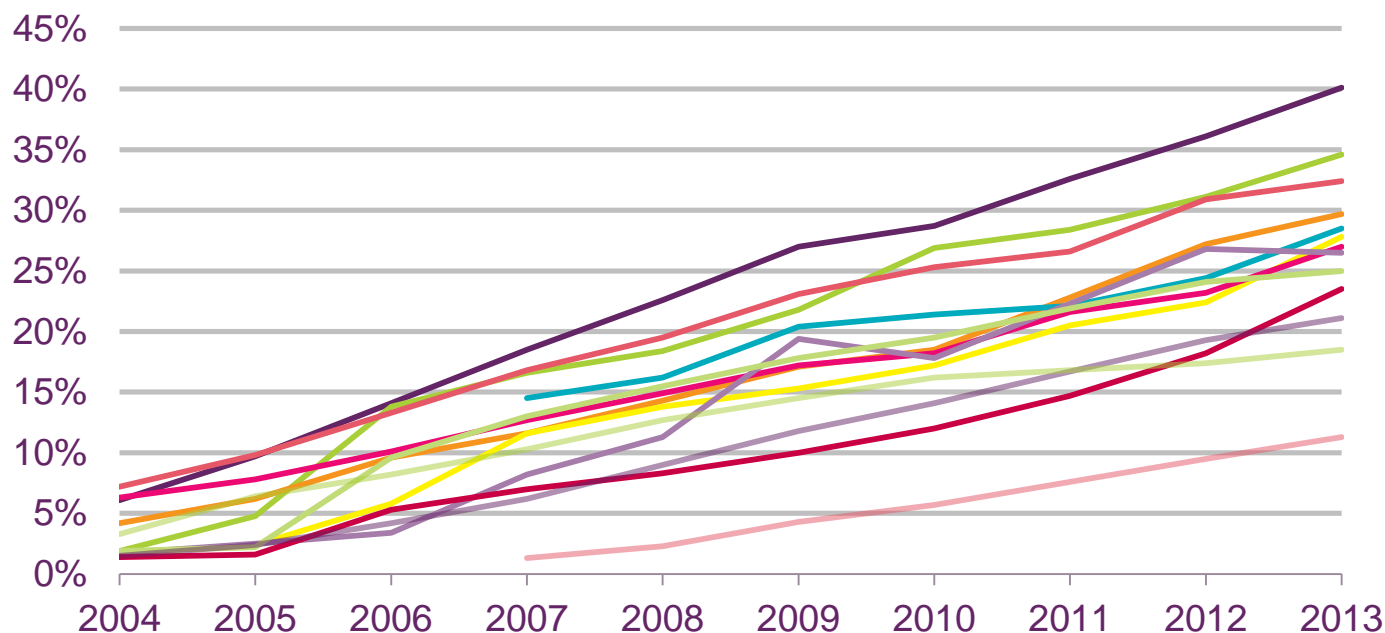
† IHS / Industry data / Ofcom, 2014.

‡Ofcom international research, October 2014, all respondents 18+

## Figure 5.2

### Internet share of total advertising spend

Internet share of all advertising spend (%)



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

Please refer to notes on adspend data for further detail and source information.

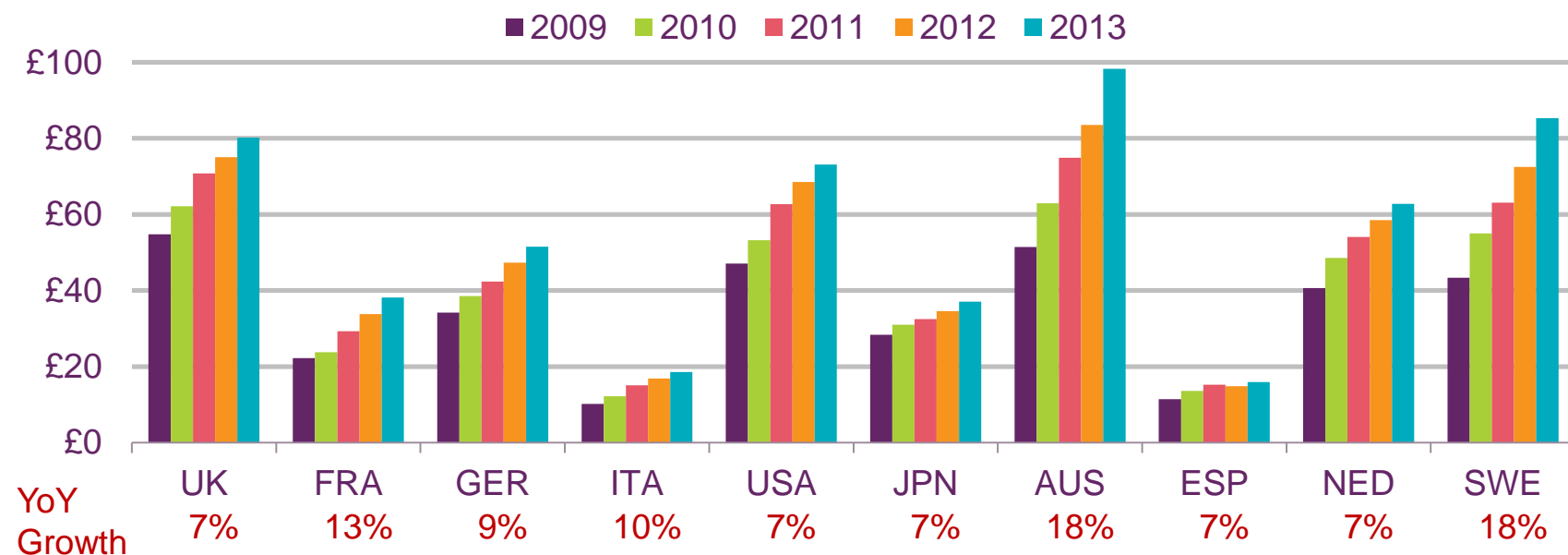
<http://www.warc.com/NotesOnAdspendData>

Note: Data for South Korea and Singapore is only available from 2007 onwards.

## Figure 5.3a

### Fixed internet advertising expenditure per head: 2009-13

Internet advertising spend per head (GBP)

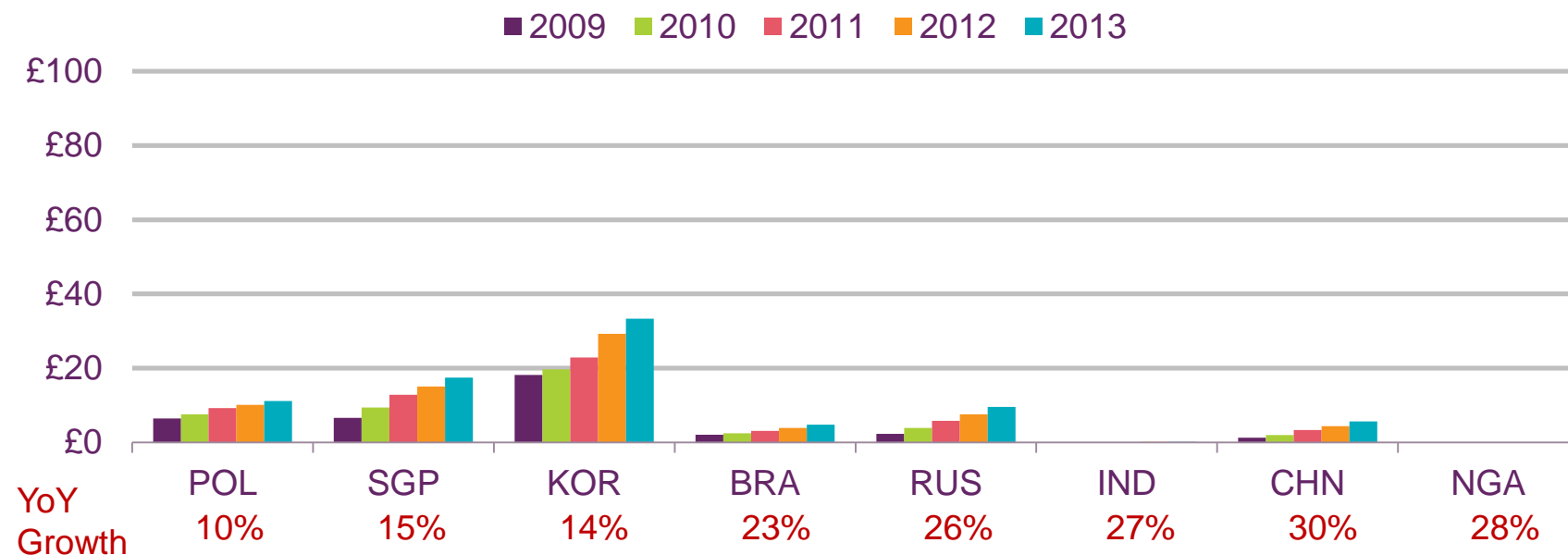


Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ [pwc.com/outlook](http://pwc.com/outlook). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS

## Figure 5.3b

### Fixed internet advertising expenditure per head: 2009-13

Internet advertising spend per head (GBP)

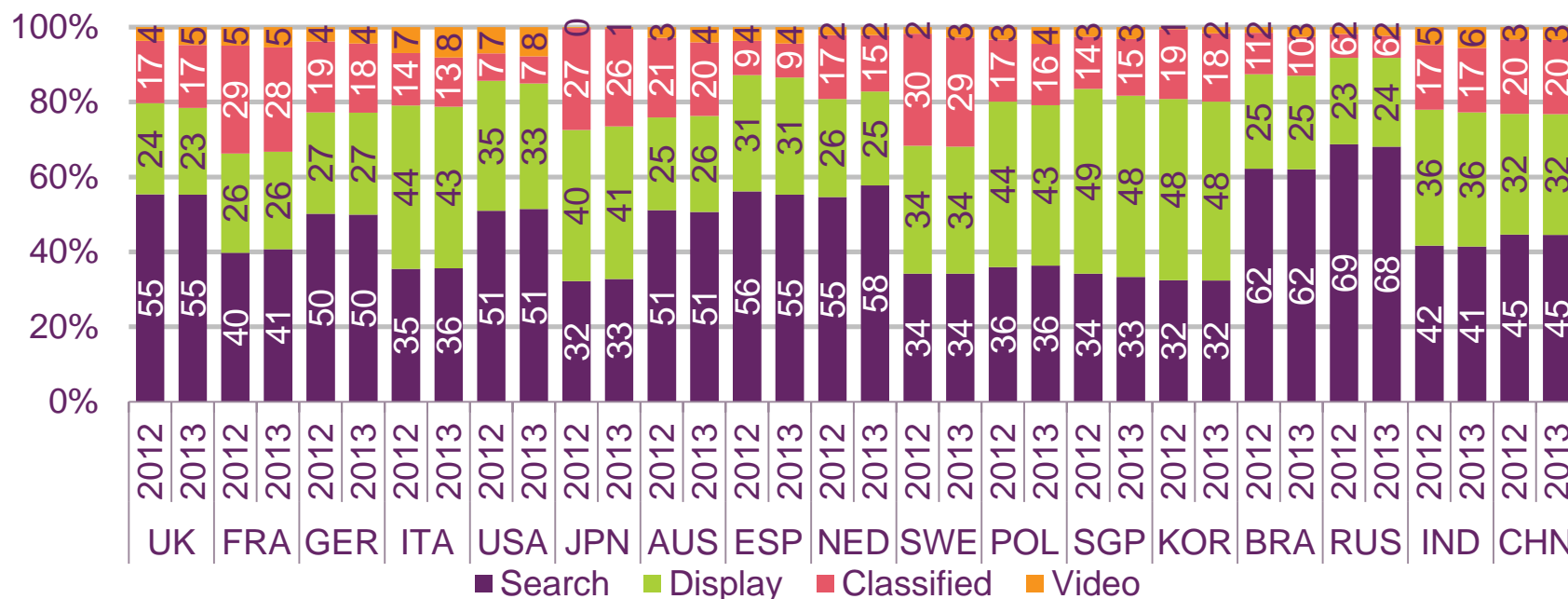


Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ [pwc.com/outlook](http://pwc.com/outlook). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS

## Figure 5.4

### Fixed internet advertising expenditure, by category: 2012-13

Proportion of internet advertising revenue (%)



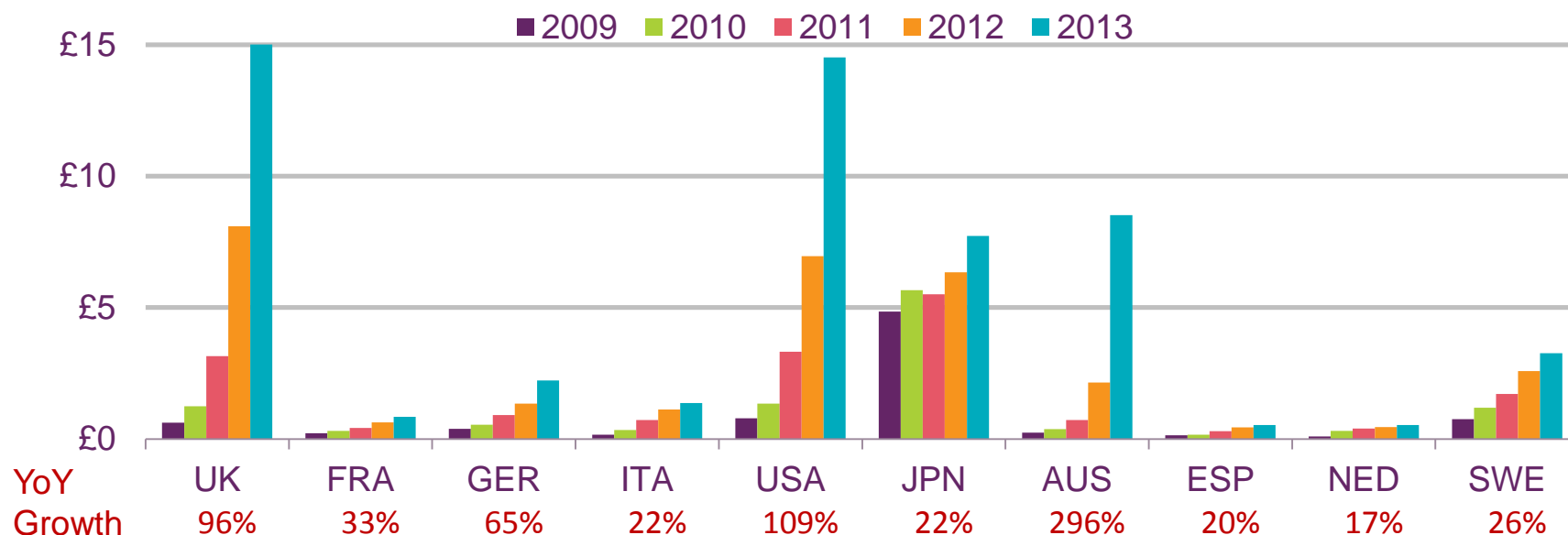
Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility



## Figure 5.5a

### Mobile advertising expenditure per head: 2009-13

Internet advertising spend per head (GBP)

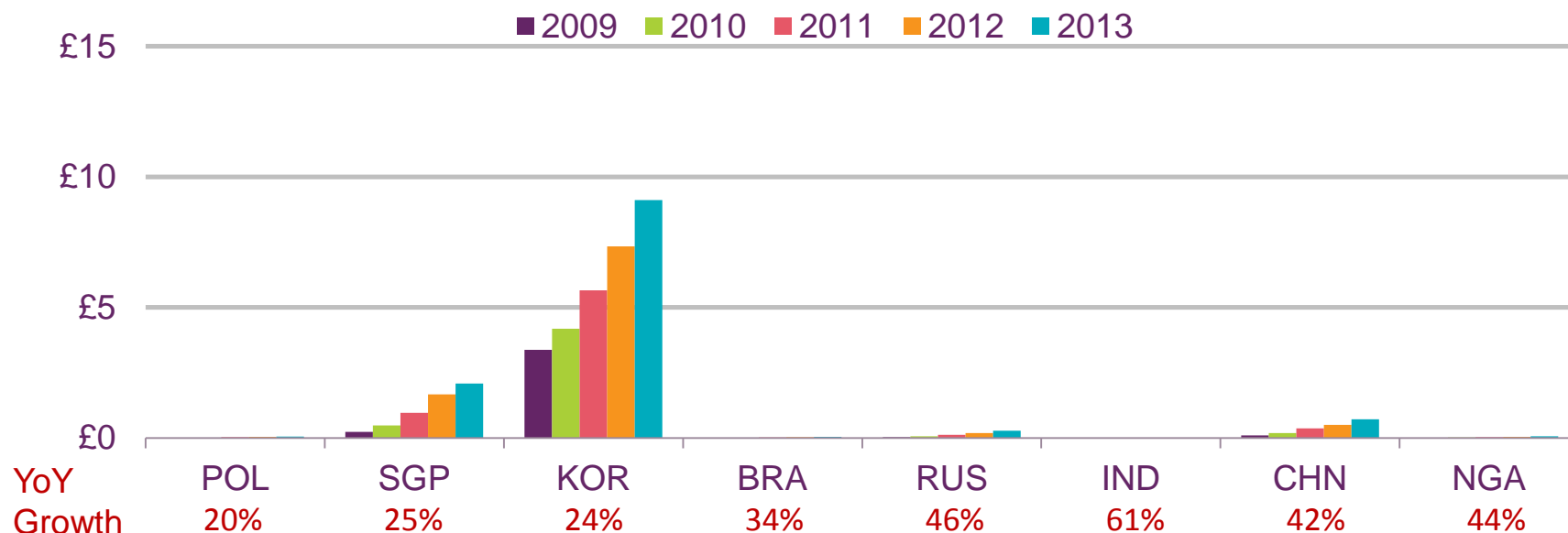


Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ [pwc.com/outlook](http://pwc.com/outlook). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS

## Figure 5.5b

### Mobile advertising expenditure per head: 2009-13

Internet advertising spend per head (GBP)



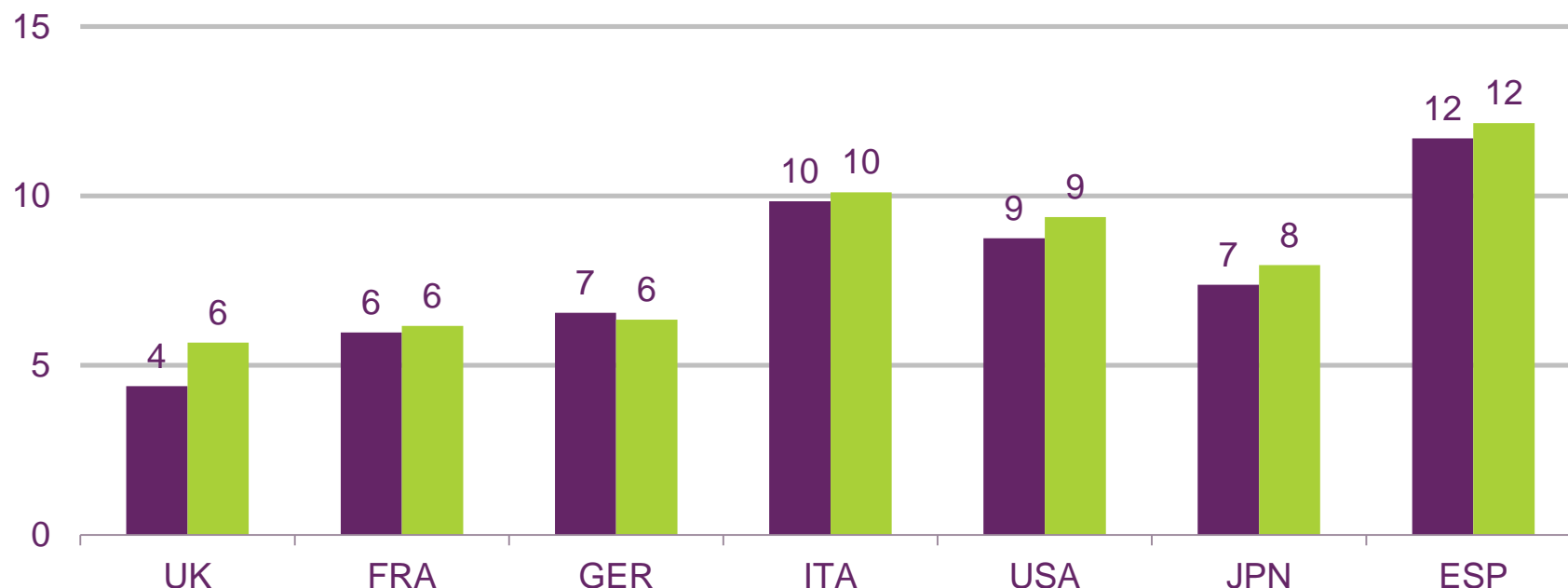
Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ [pwc.com/outlook](http://pwc.com/outlook). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS



## Figure 5.6

Tapped on an advert in a mobile browser or application in the past month

Mobile internet users (%)

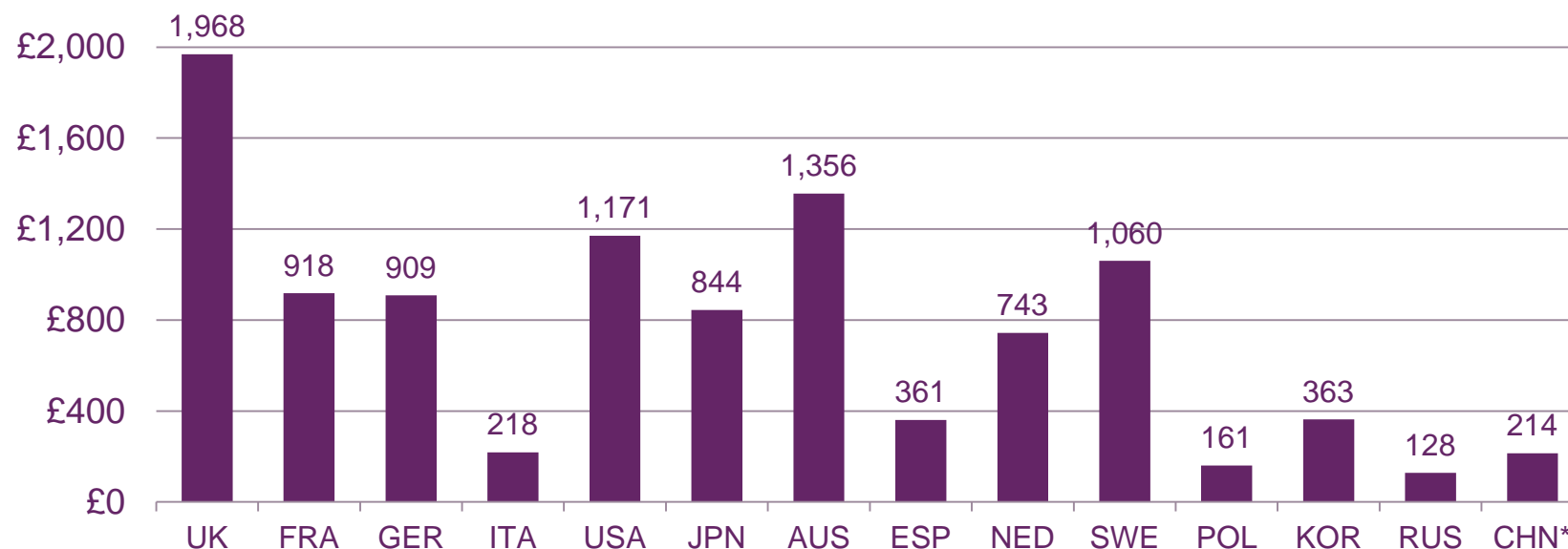


Source: comScore MobiLens, August 2013 (three-month average) and August 2014 (three-month average), mobile internet users aged 13+

## Figure 5.7

### Value of B2C e-commerce per head 2013

Value per head (£)



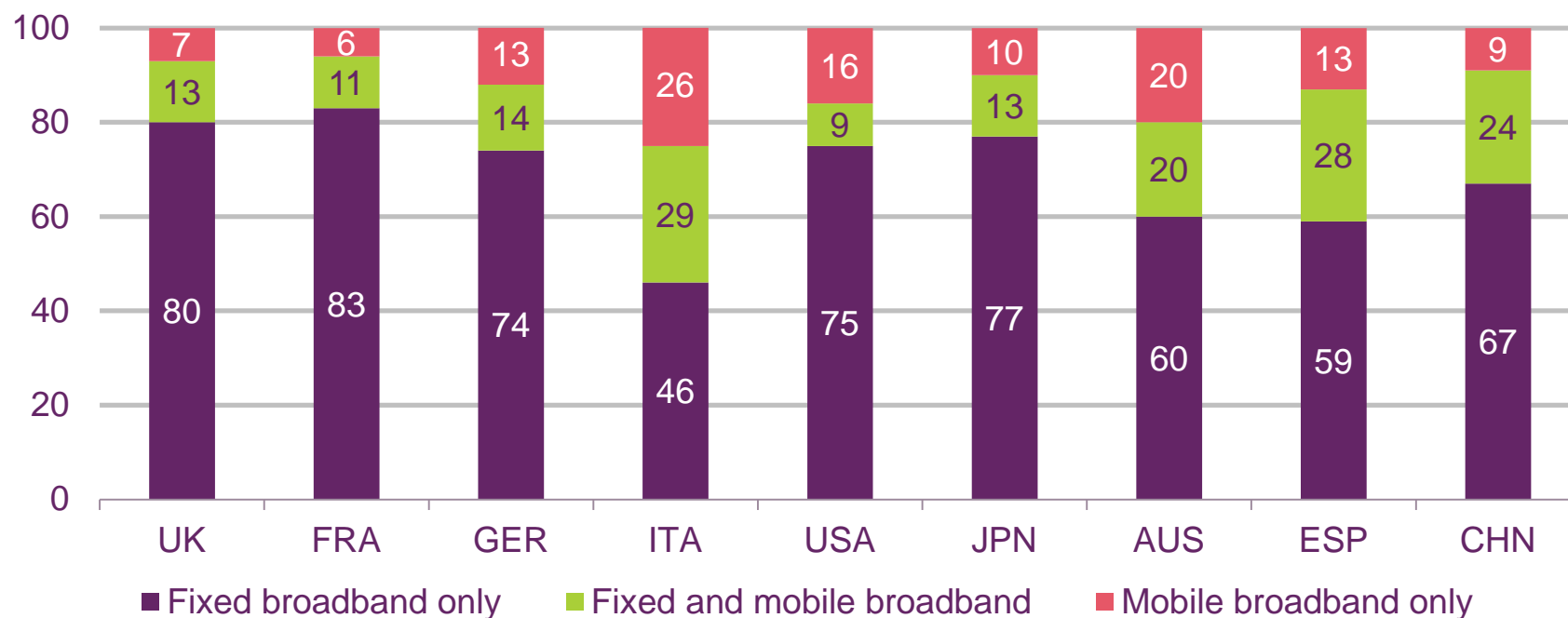
Source: European B2C e-commerce report 2014, Ecommerce Europe

Notes: Values converted from Euros to British Sterling (£1 = €1.1769896). Population figures from Ofcom/IHS. \*China also includes C2C goods and services.

## Figure 5.8

### Take-up of fixed and mobile broadband among broadband households

% of broadband households



Source: Ofcom consumer research October 2014

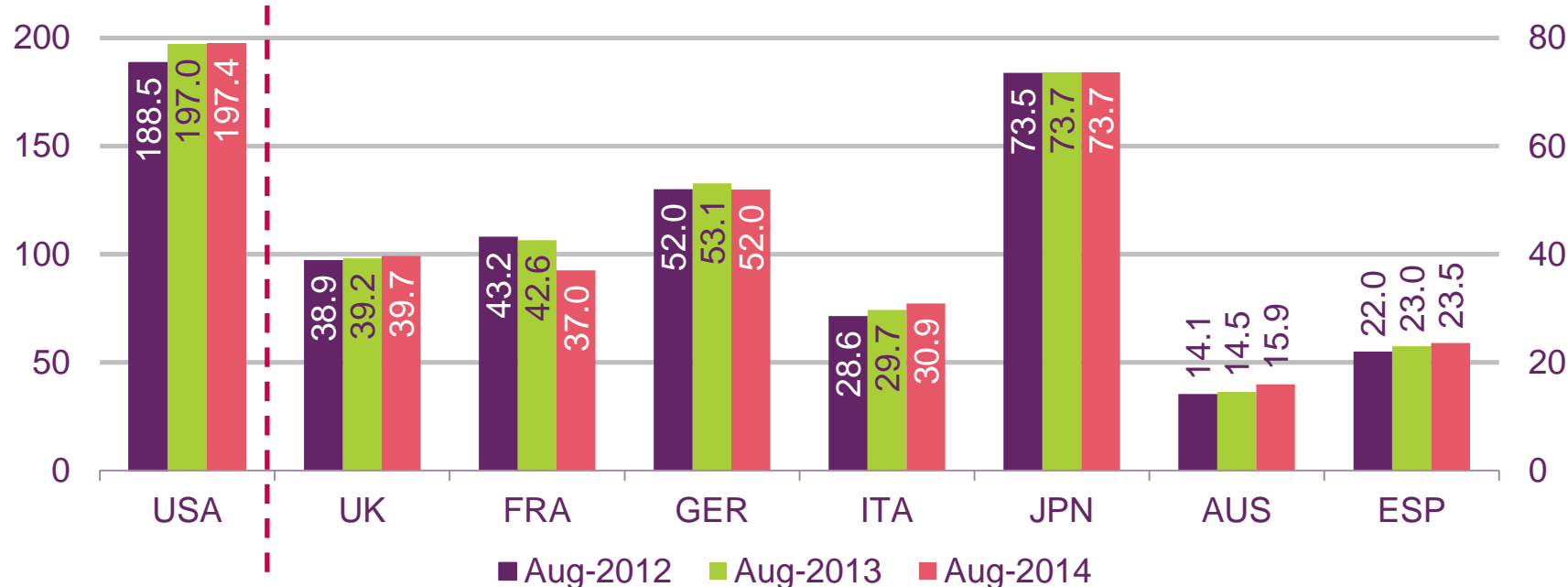
Base: All respondents with broadband, UK=929, FRA=945, GER=844, ITA=877, USA=747, JPN=737, AUS=910, ESP=903, CHN=923.

Q3b. Which of the following services do you have in your home?

## Figure 5.9

### Active audience on laptop and desktop computers: 2012-14

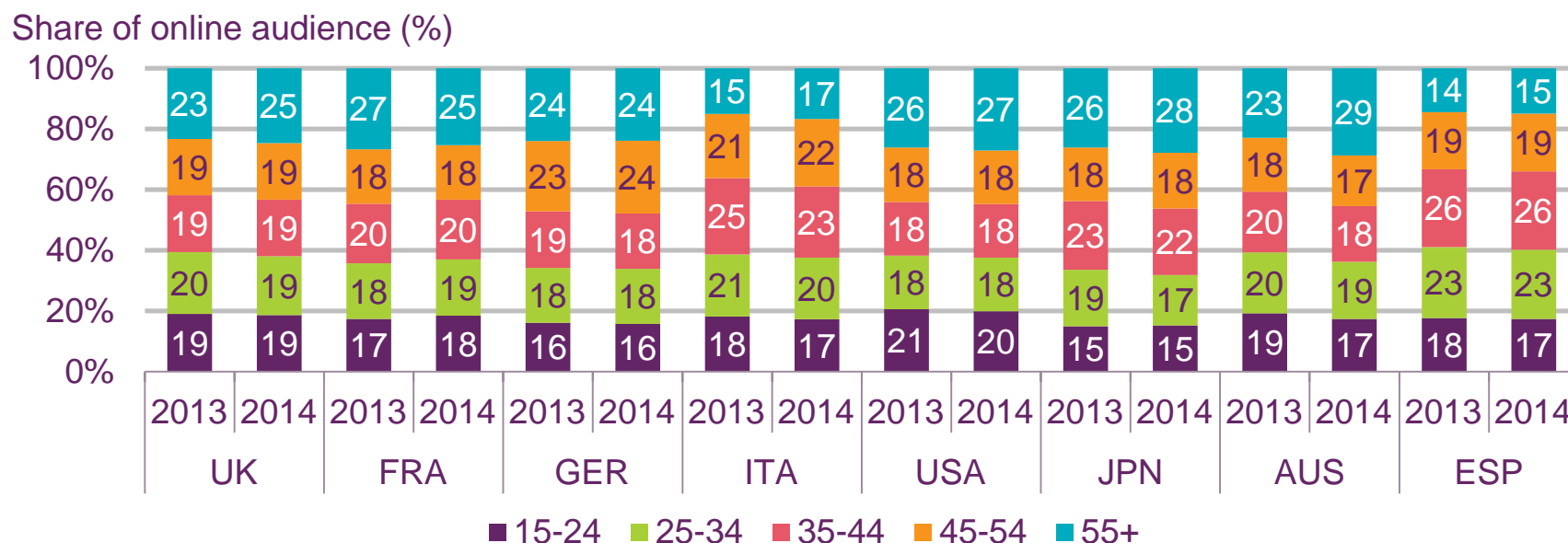
Online audience (millions)



Source: comScore MMX, work and home panel, August 2012 to August 2014, persons 15+

## Figure 5.10

Active audience on a laptop or desktop computer, by age: 2013- 2014

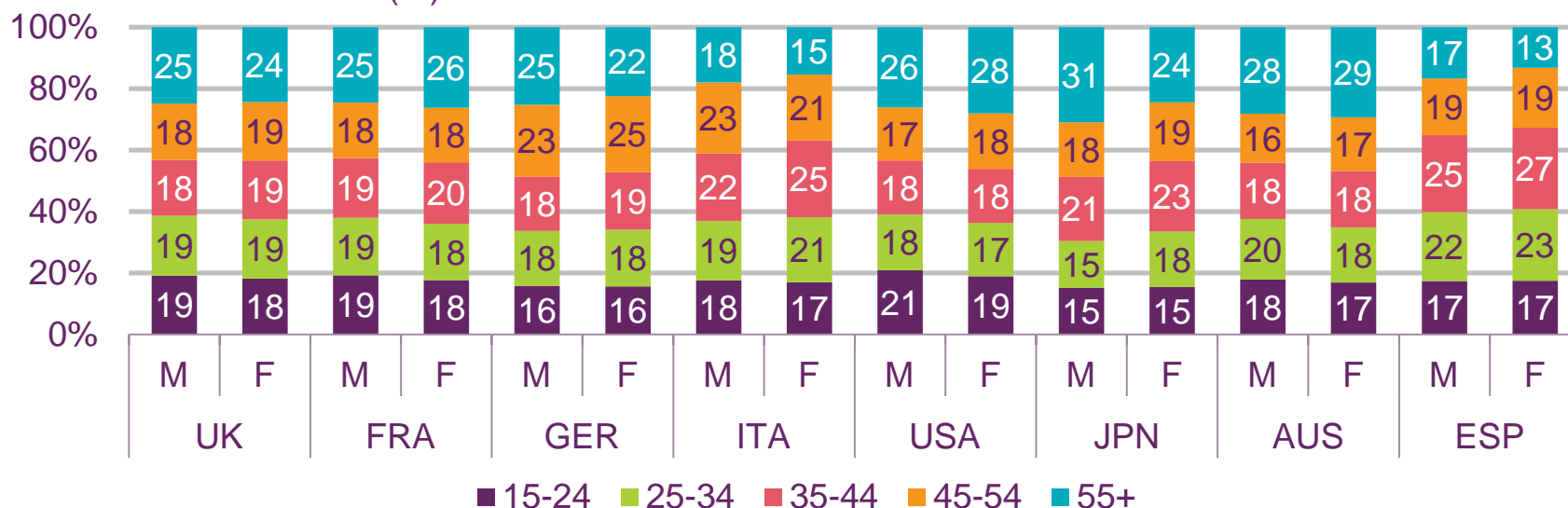


Source: comScore MMX, home and work panel, August 2013 and August 2014, persons 15+

## Figure 5.11

Active audience on a laptop or desktop computer, by age and gender:  
August 2014

Share of online audience (%)

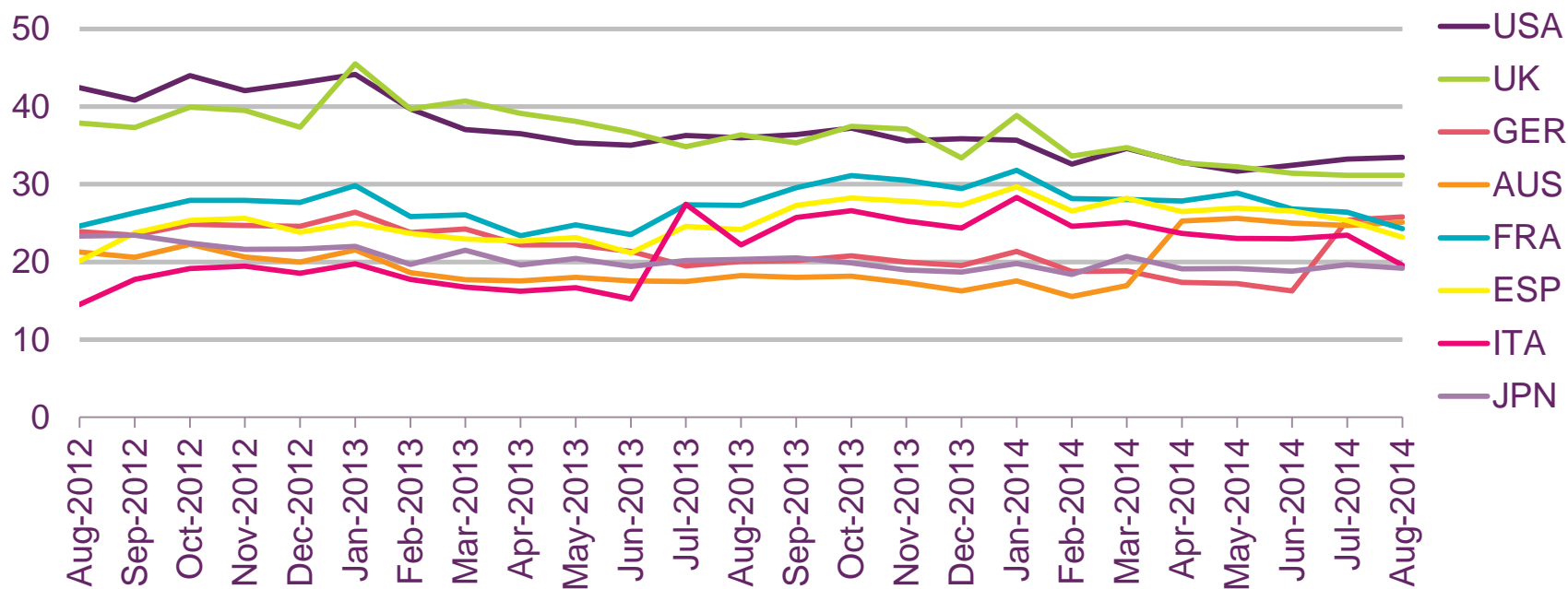


Source: comScore MMX, home and work panel, August 2014, persons 15+

## Figure 5.12

### Average time spent browsing on a laptop or desktop computer

Hours online per month



Source: comScore MMX, work and home panel, August 2012 to August 2014, persons 15+

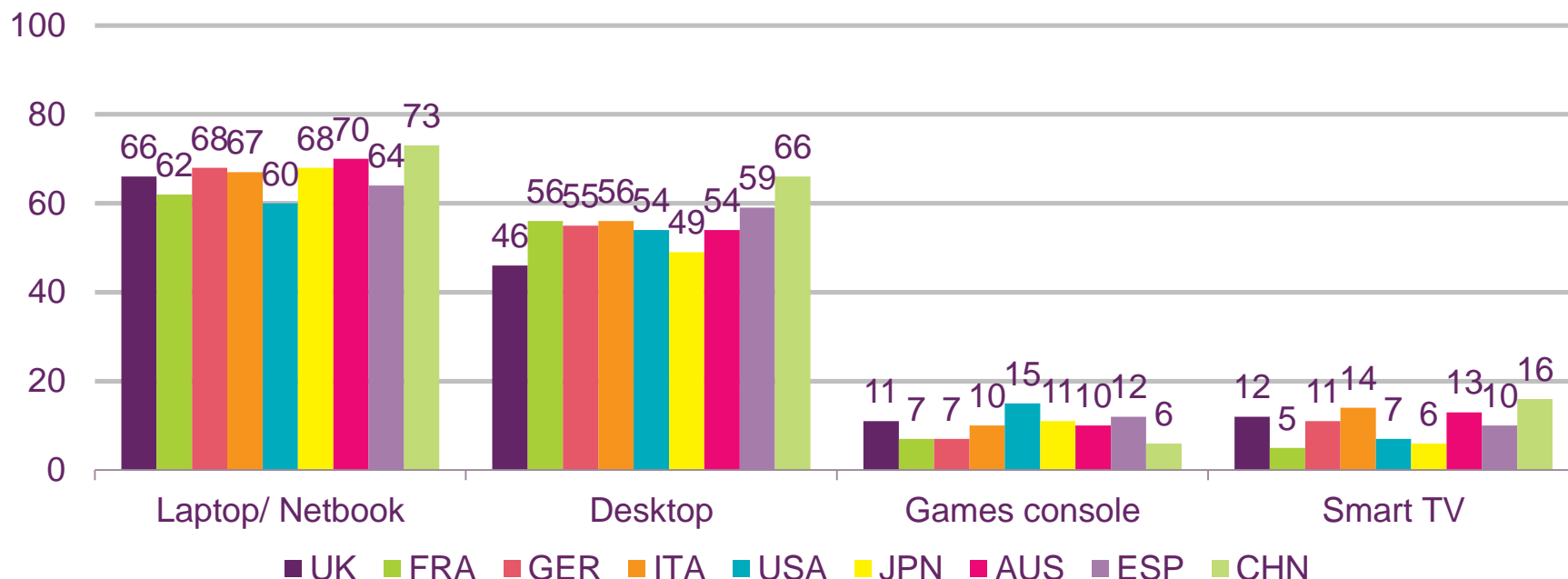
Note: Comparisons between data before and after January 2013 in the UK, March 2013 in the US, and July 2013 in France, Spain and Italy should be treated with caution due to a change in panel weighting methodology



# Figure 5.13

## Fixed devices used to access the internet

All respondents (%)



Source: Ofcom consumer research October 2014

Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.

Q.7a Which of the following devices do you use to access the internet?

## Figure 5.14

### Use of smartphones

Proportion of respondents (%)



Source: Ofcom consumer research October 2014

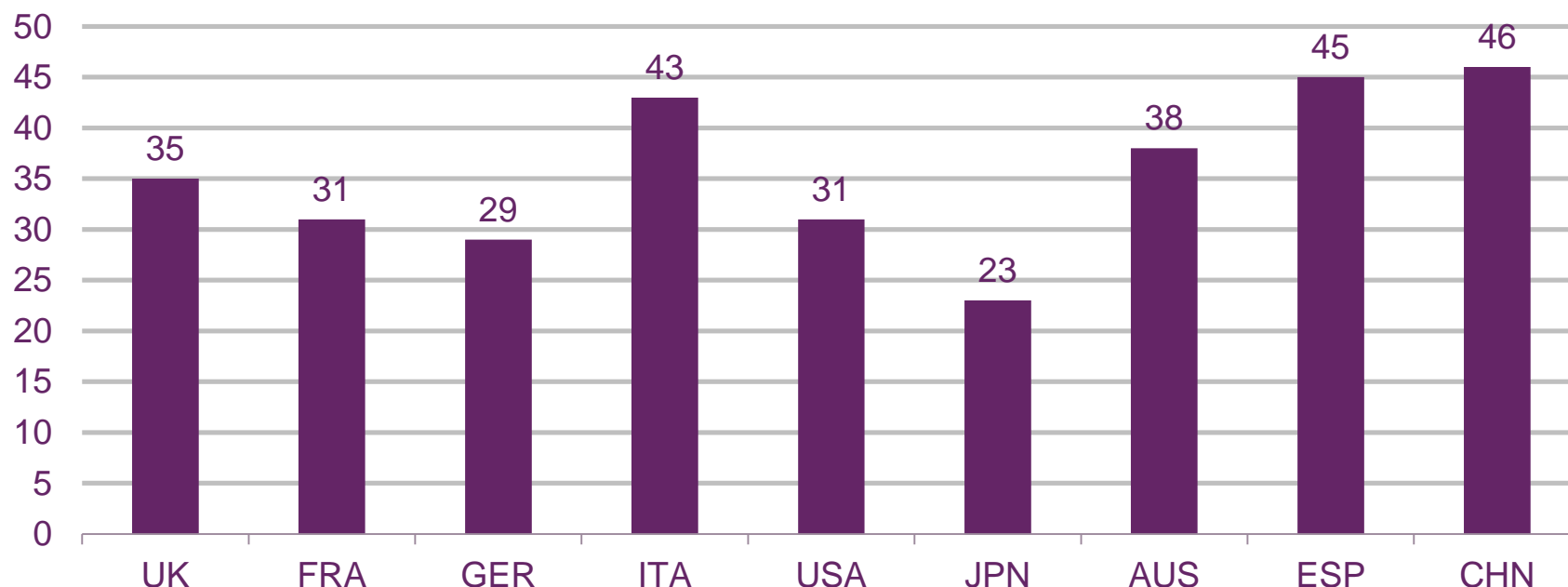
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010

Q. 4a Which of the following devices do you personally use?

## Figure 5.15

### Use of tablets

Proportion of respondents (%)



Source: Ofcom consumer research October 2014

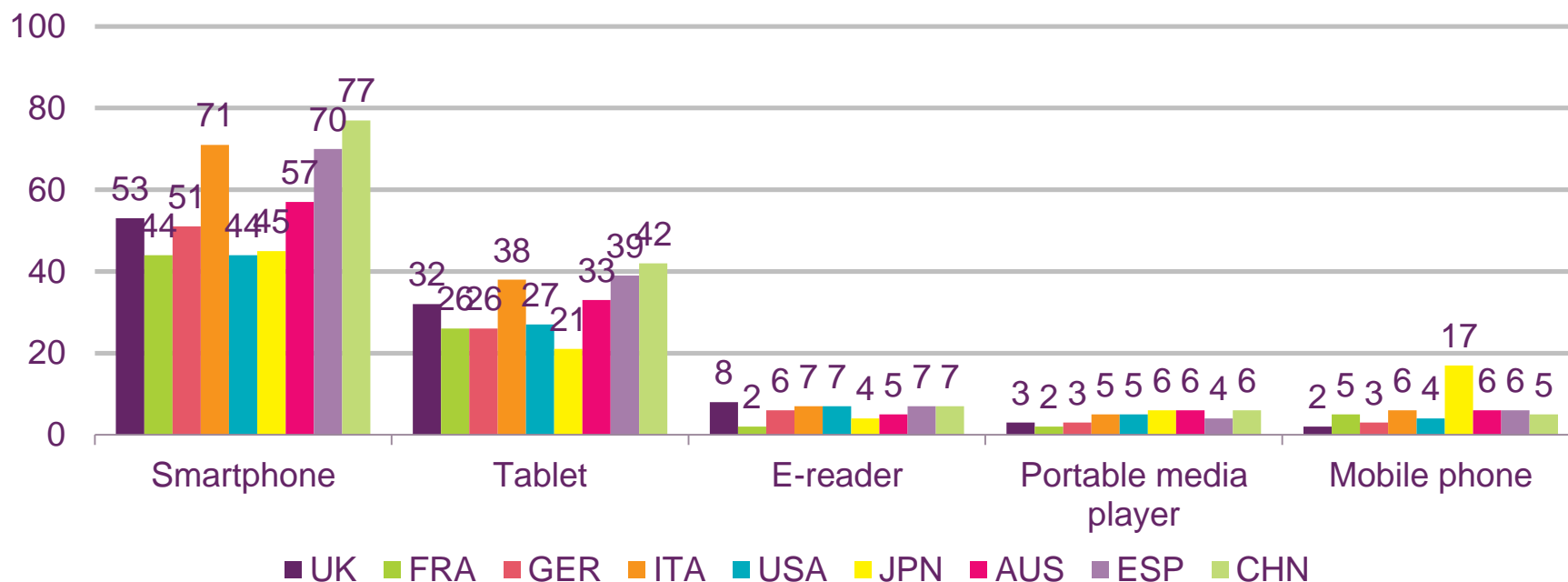
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010

Q. 4a Which of the following devices do you personally use?

# Figure 5.16

## Portable devices used to access the internet

All respondents (%)



Source: Ofcom consumer research October 2014

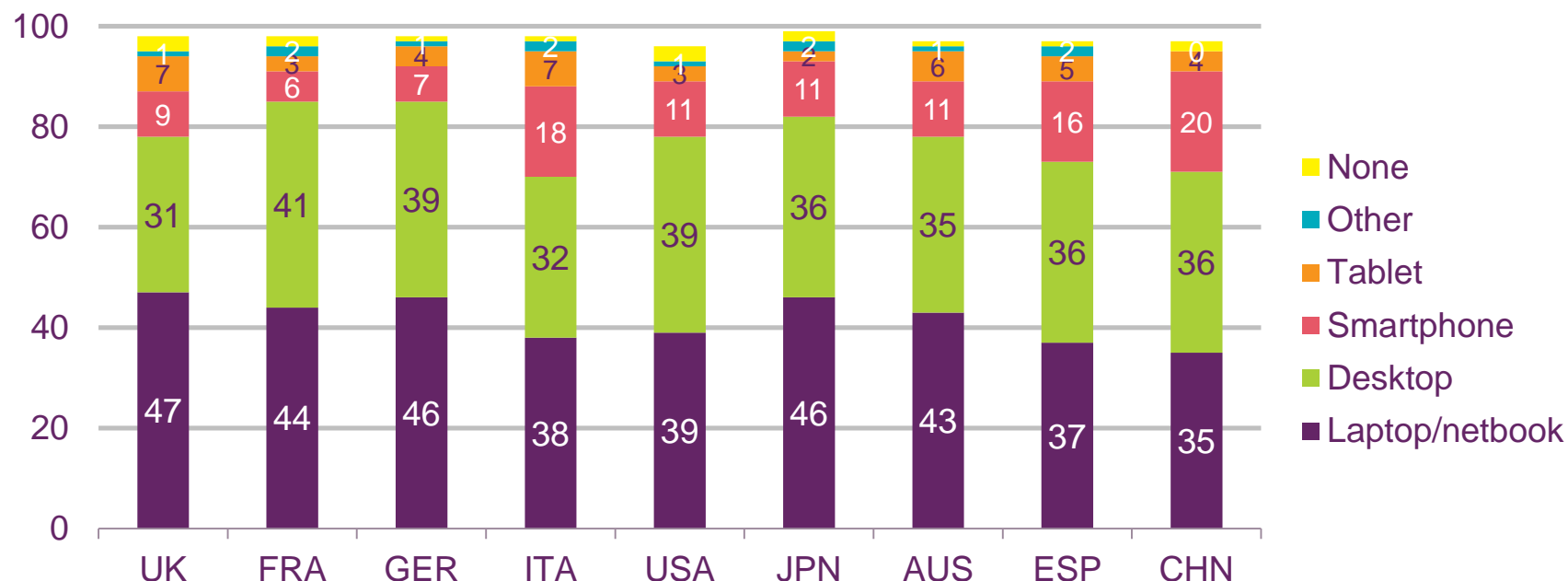
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.

Q.7a Which of the following devices do you use to access the internet?

## Figure 5.17

### Most important device for accessing the internet

All respondents (%)



Source: Ofcom consumer research October 2014

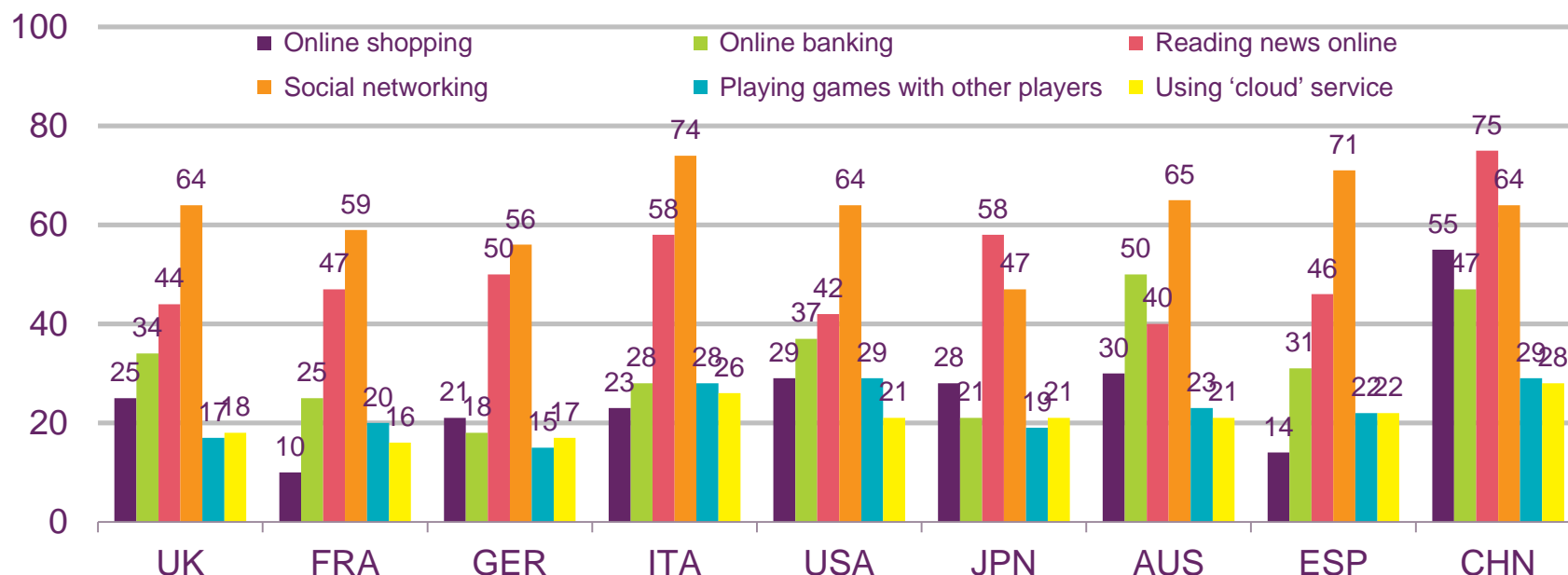
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.

Q.7b Which is the most important device that you use to connect to the internet (at home, or elsewhere)?

# Figure 5.18

## Mobile-internet activities

All respondents who access internet with a mobile phone/ smartphone (%)



Source: Ofcom consumer research October 2014

Base: All respondents who access internet with a mobile phone/ smartphone, UK=540, FRA=469, GER=531, ITA=762, USA=443, JPN=566, AUS=579, ESP=742, CHN=808

Q9a Which, if any, of the following internet activities do you use each of your devices for?

# Figure 5.19

Top ten web properties accessed on a laptop and desktop computer, by country



	UK	FRA	GER	ITA	USA	JPN	AUS	ESP
1	Google Sites -2	Google Sites -13	Google Sites -5	Google Sites 4	Google Sites 2	Google Sites 3	Google Sites 12	Google Sites 3
2	Facebook -2	Microsoft Sites -13	Facebook 8	Facebook -1	Yahoo Sites -12	Yahoo Sites -2	Microsoft Sites 5	Facebook 3
3	Microsoft Sites -10	Facebook -13	Amazon Sites 5	ItaliaOnline -18	Microsoft Sites -9	FC2 inc. -10	Facebook 11	Microsoft Sites -7
4	Yahoo Sites -3	Webedia Sites 277	eBay -3	Yahoo Sites -12	Facebook 7	Microsoft Sites -1	Yahoo Sites -17	Unidad Medios Digitales -12
5	Amazon Sites -10	CCM-Benchmark -9	Microsoft Sites 2	Microsoft Sites -9	AOL, Inc. -4	NHN Corporation -7	eBay 11	Wikimedia Foundation Sites -10
6	BBC Sites 7	Yahoo Sites -15	Axel Springer SE -5	Banzai -5	Amazon Sites -9	Rakuten Inc 13	Wikimedia Foundation Sites -2	Yahoo Sites -12
7	eBay -11	Orange Sites -15	Deutsche Telekom -13	Wikimedia Foundation Sites -9	Mode Media (formerly Glam Media) -21	Amazon Sites -20	Amazon Sites 28	Prisa -13
8	Wikimedia Foundation Sites -22	Schibsted Media Group -25	United-Internet Sites -7	eBay -2	eBay -7	DMM -10	Telstra Corporation Limited 32	Vocento -11
9	Apple Inc. -18	Solocal Group -22	Hubert Burda Media -4	RCS Media Group 1	CBS Interactive -19	Wikimedia Foundation Sites -18	Fairfax Media 64	Schibsted Media Group -11
10	AOL, Inc. 7	Wikimedia Foundation Sites -30	Wikimedia Foundation Sites -13	Amazon Sites 18	Comcast NBCUnivers al 7	NTT Group -21	Apple Inc. -15	Dropbox Sites 0

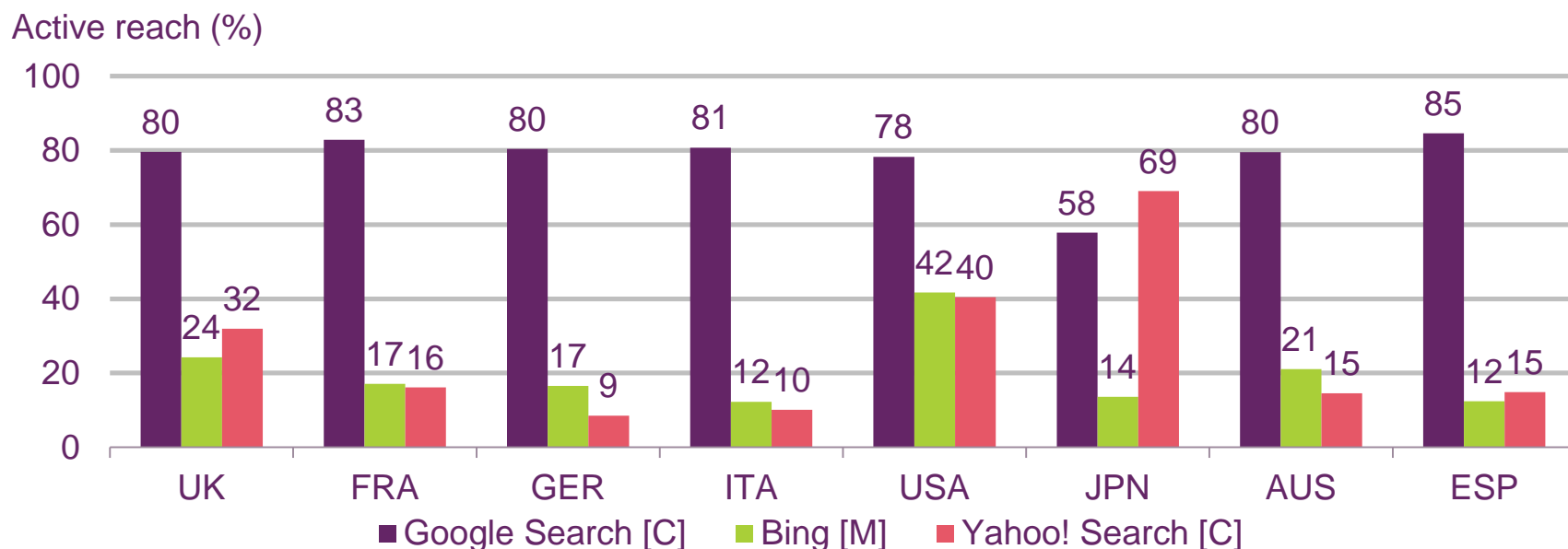
Source: comScore MMX, home and work panel, August 2013 and August 2014, persons 15+

Note: Coloured font indicates brand appears more than once. Web property audience includes relevant internet application audiences where available. '+' or '-' and a number denotes change in rank since 2012 comScore data, '-' only denotes no change, and 'N' denotes a new entrant to the top ten.



## Figure 5.20

Active reach of selected search engines on laptop and desktop computers



Source: comScore MMX, home and work panel, August 2014, persons 15+

## Figure 5.21

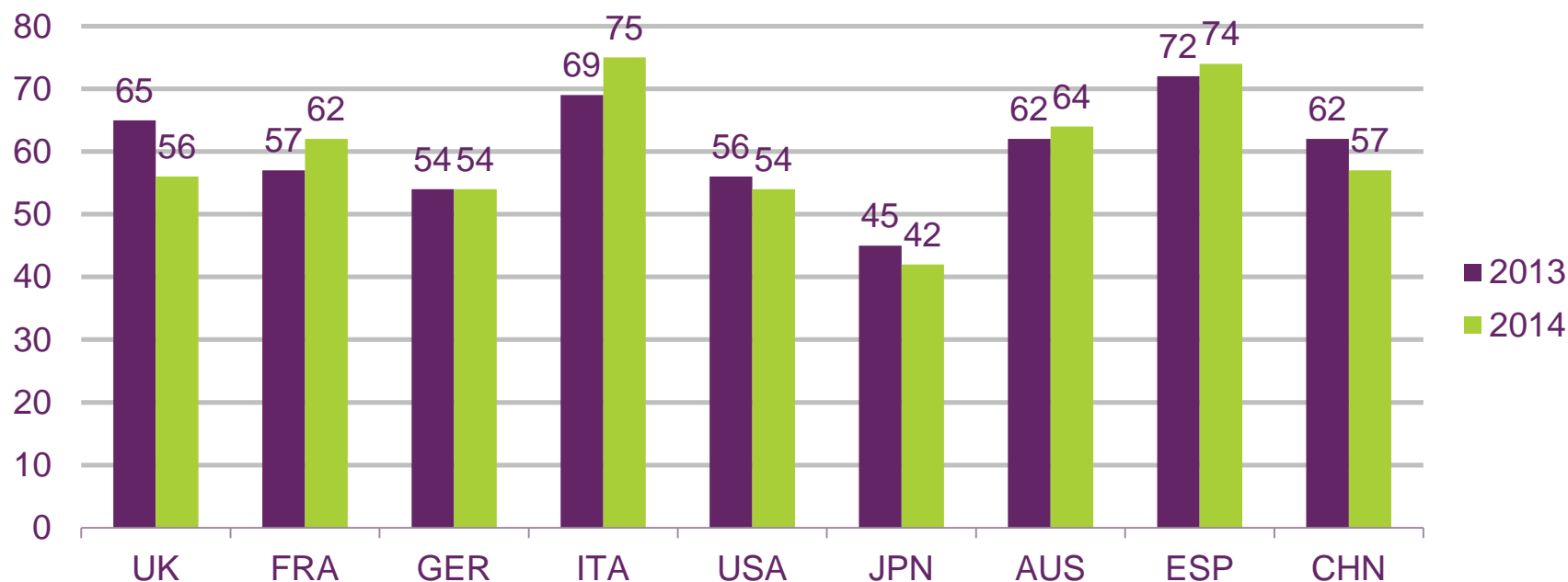
Most popular search terms on Google between August 2013 and August 2014

Country	1 <sup>ST</sup>	2 <sup>ND</sup>	3 <sup>RD</sup>	Largest increase
UK	facebook	bbc	google	world cup 2014
FRA	facebook	youtube	bon coin	coupe du monde
GER	facebook	google	youtube	filmze
ITA	facebook	youtube	google	mondiali 2014
USA	facebook	google	you	world cup
JPN	画像 <sup>1</sup>	天気 <sup>2</sup>	yahoo	モンスター <sup>3</sup>
AUS	facebook	google	youtube	world cup
ESP	facebook	hotmail	youtube	Comuniazo
NED	facebook	google	youtube	utopia
SWE	google	facebook	youtube	dreamfilm
POL	facebook	onet	allegro	olx
SGP	singapore	google	youtube	mh370
KOR	네이버 <sup>4</sup>	토렌트 <sup>5</sup>	밍키넷 <sup>6</sup>	밍키넷 <sup>7</sup>
BRA	facebook	google	youtube	whatsapp
RUS	одноклассники <sup>8</sup>	vk <sup>9</sup>	яндекс <sup>10</sup>	украина <sup>11</sup>
IND	facebook	india	fb	matka
CHN	百度 <sup>12</sup>	qq	手机 <sup>13</sup>	helloworld
NGA	nigeria	news	facebook	ebola

## Figure 5.22

### Weekly access of social networks

All respondents (%)



Source: Ofcom consumer research October 2014 and September 2013.

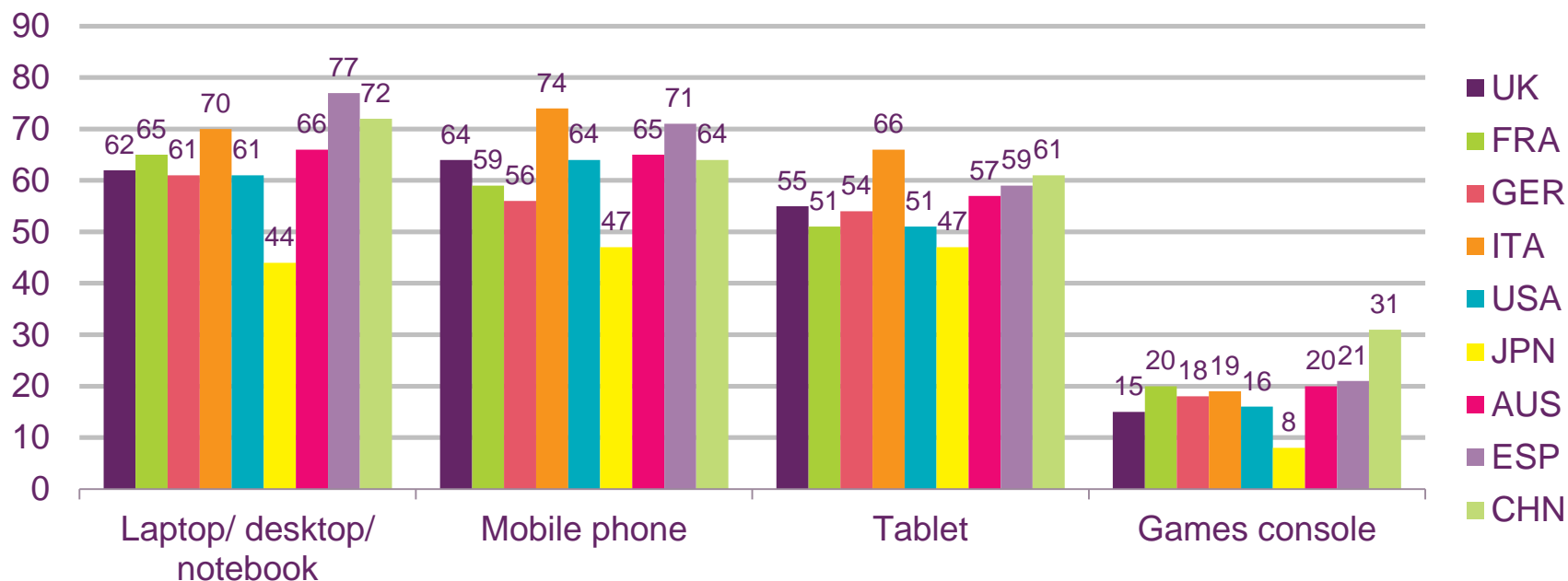
Base (2014): All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.

Q.8 Which, if any, of the following activities do you use your internet connection for at least once a week?

## Figure 5.23

### Accessing social networks, by device ownership

Proportion (%) of respondents who access the internet on each device type



Source: Ofcom consumer research October 2014

Base: All respondents who access internet with each type of device - UK=905/540/318/99\*, FRA=953/469/270/67\*, GER=949/531/263/69\*, ITA=902/762/384/97\*, USA=907/443/274/131, JPN=934/566/209/103, AUS=944/579/325/87\*, ESP=903/742/394/116, CHN=947/808/446/67\*

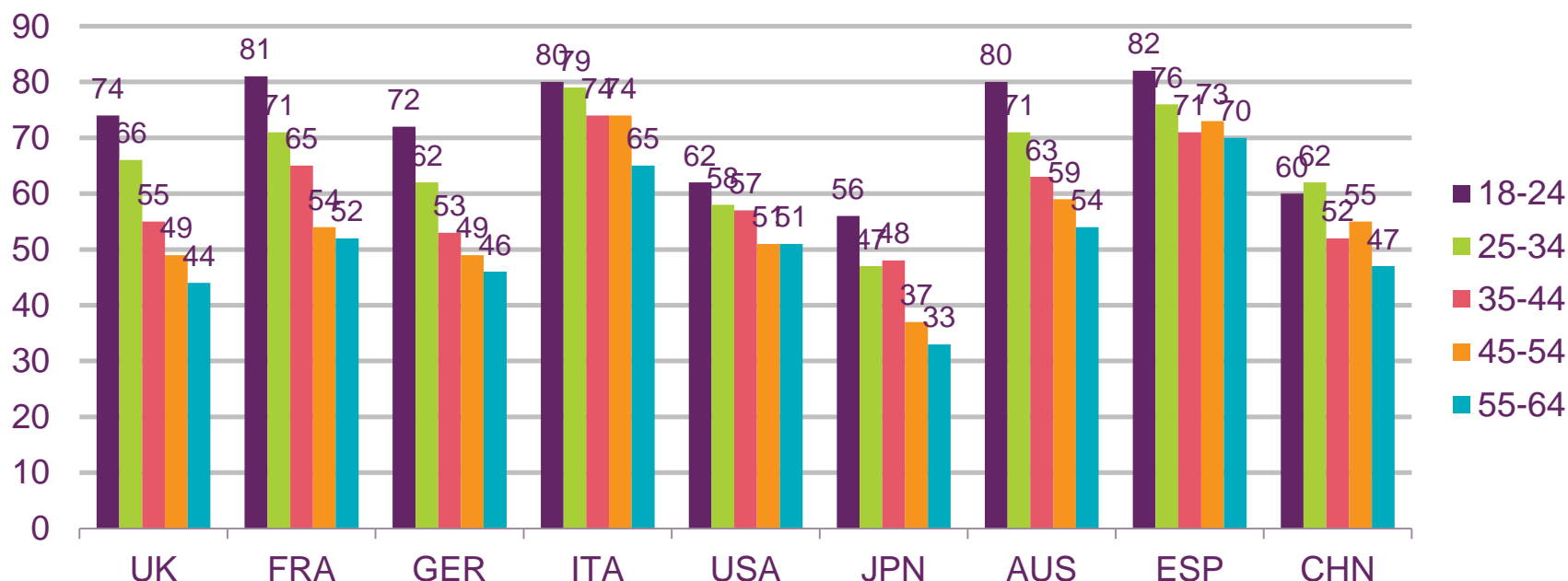
(\*Caution: base under 100)

Q9a Which, if any, of the following internet activities do you use each of your devices for?

## Figure 5.24

### Weekly use of home internet connection to visit social networks by age

All respondents



Source: Ofcom consumer research October 2014

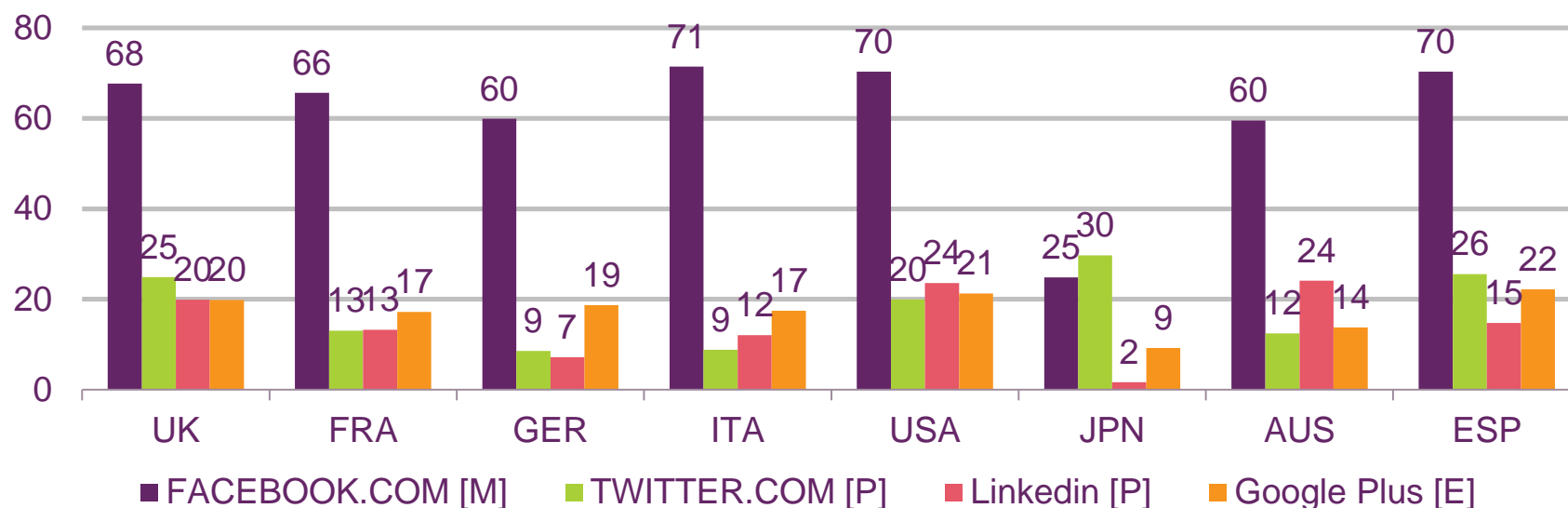
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.

Q.8 Which, if any, of the following activities do you use your internet connection for at least once a week?

## Figure 5.25

Active reach of selected social networks on laptop and desktop computers

Active reach (%)

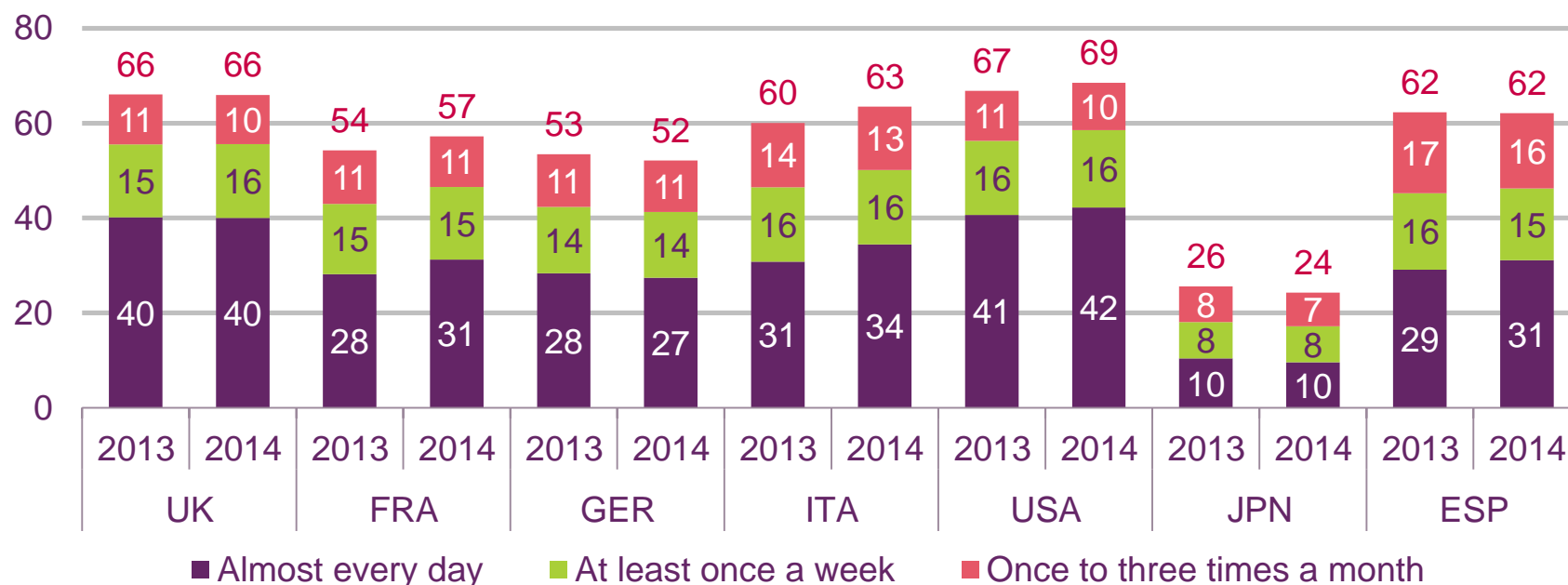


Source: comScore MMX, home and work panel, August 2014, persons 15+

## Figure 5.26

### Monthly accessing of social networks on mobile phones

Proportion of mobile internet users (%)



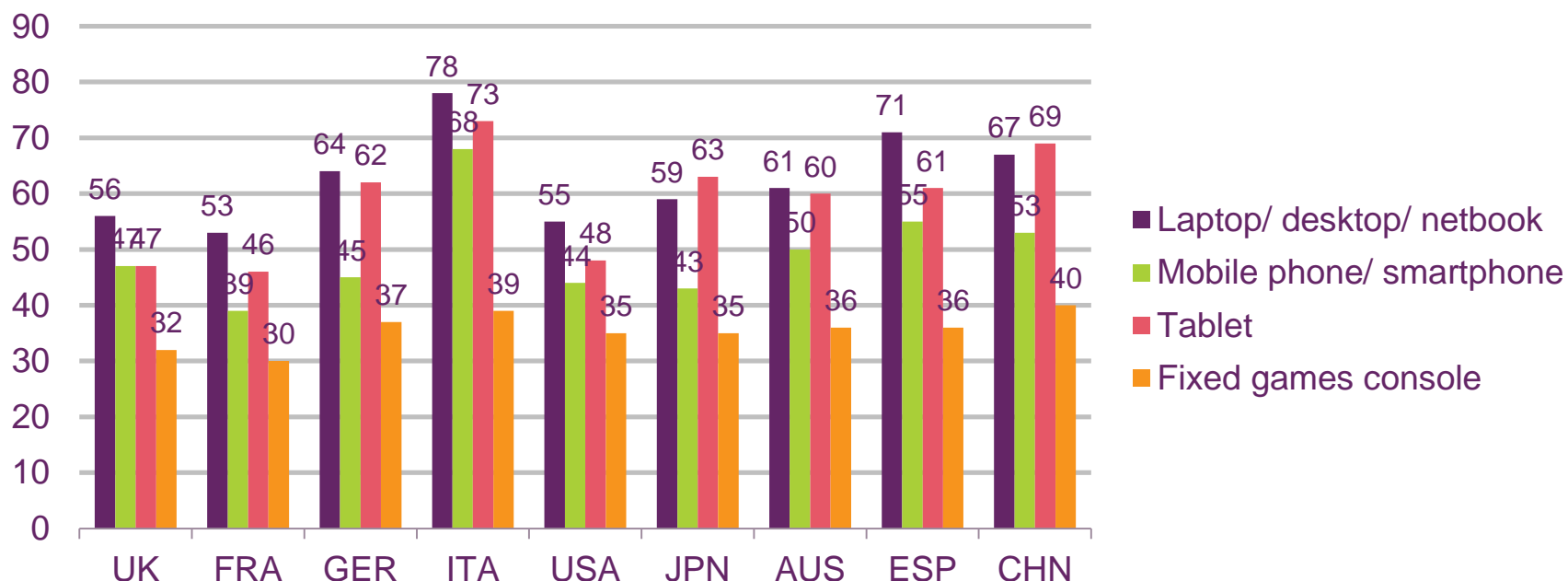
Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+



## Figure 5.27

### Access of online video clips by device ownership

All respondents who access internet with each device (%)



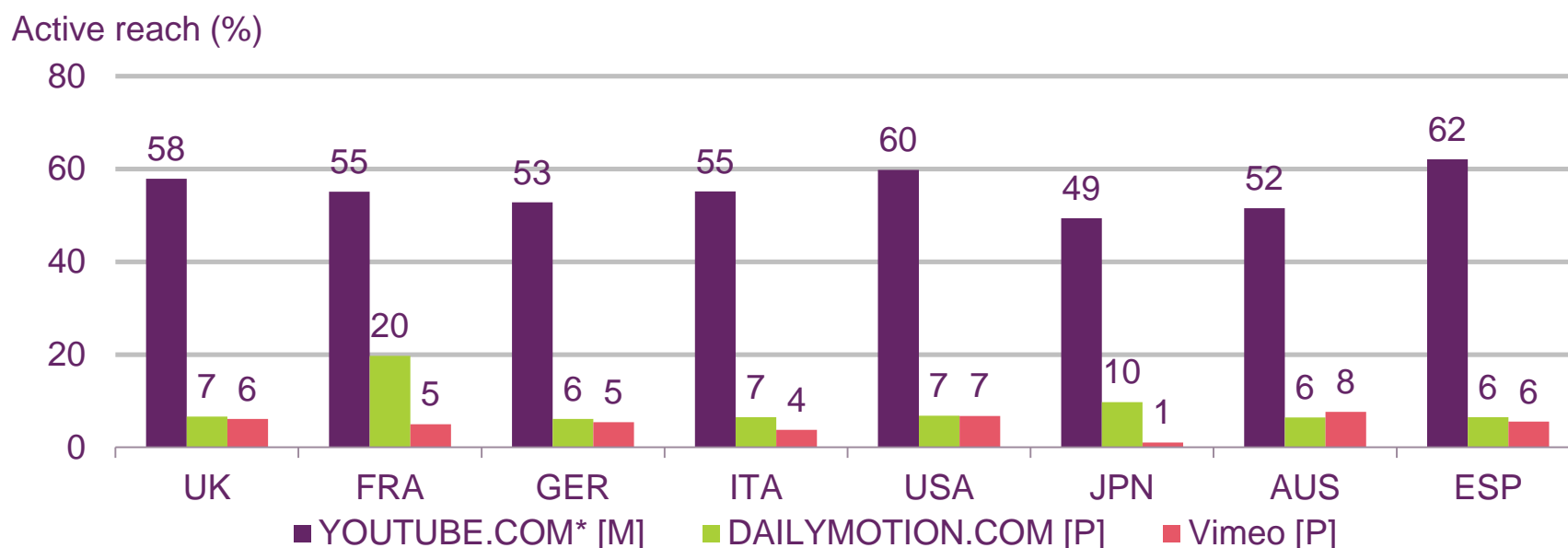
Source: Ofcom consumer research October 2014

Base: All respondents with each device, laptop/desktop/netbook 902-953 in each market, mobile phone/ smartphone 443-808 in each market, tablet computer 209-446 in each market, games console attached to TV 63-131 in each market.

Q.9c What sorts of video content do you watch on each of your devices over the internet?

## Figure 5.28

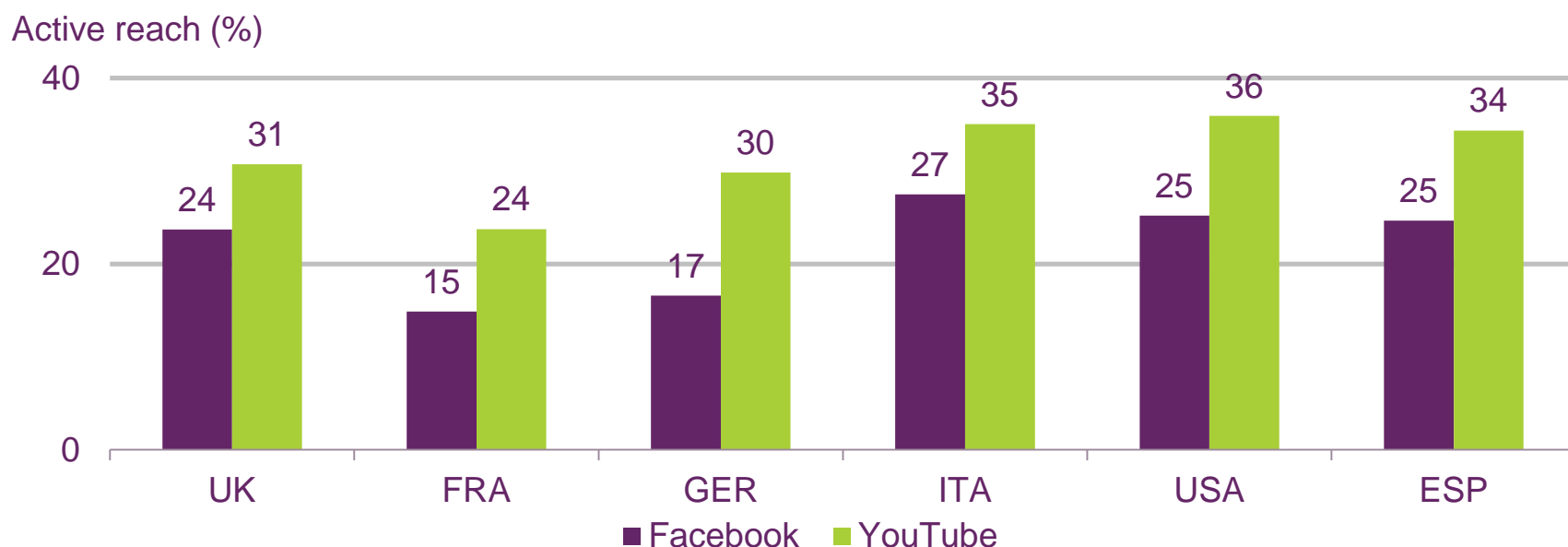
Active reach of selected online video websites on laptop and desktop computers



Source: comScore MMX, home and work panel, August 2014, persons 15+

# Figure 5.29

Active reach of selected websites for viewing online video on mobile

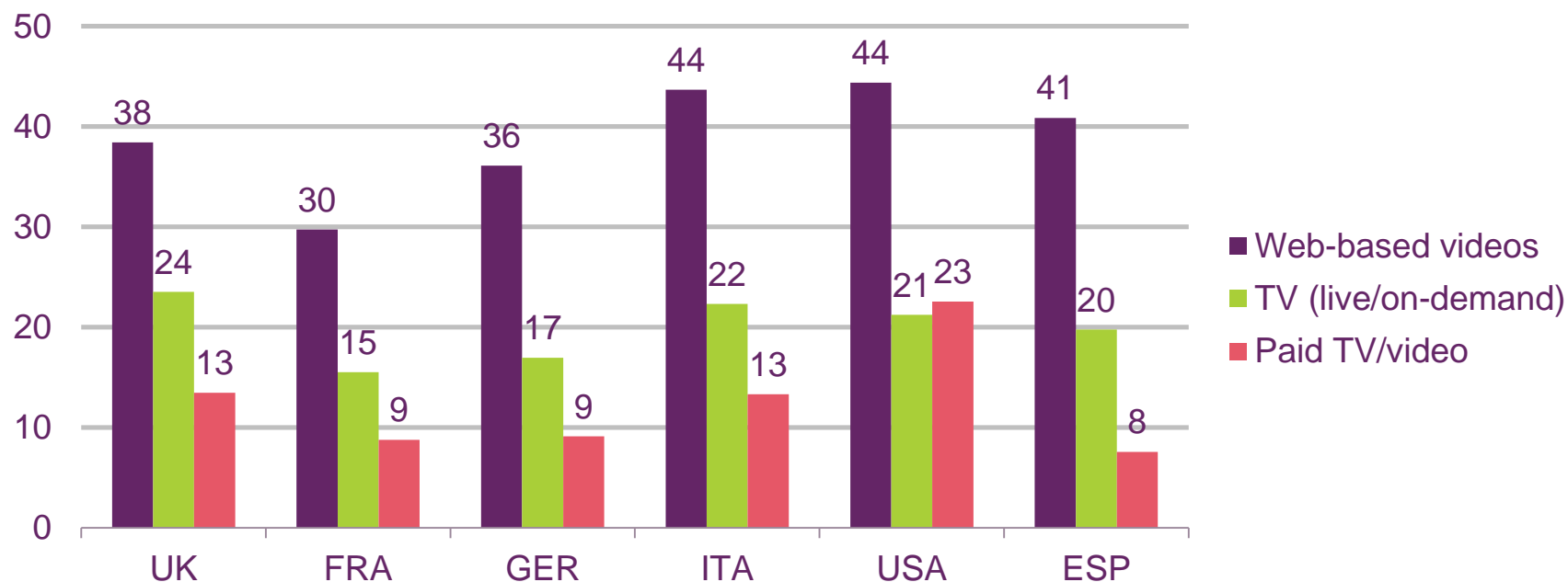


Source: comScore MobiLens, August 2014 (three-month average), mobile internet users aged 13+

## Figure 5.30

### Type of TV/Video service accessed on mobile

Mobile internet users (%)

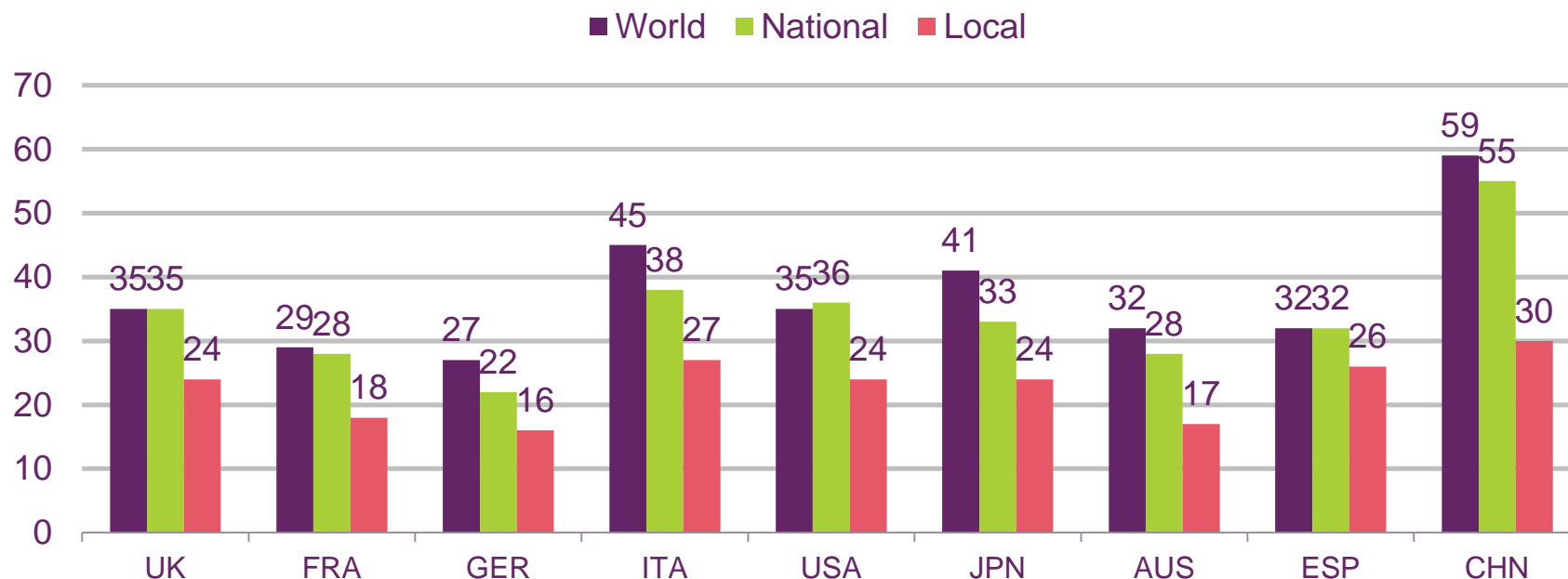


Source: comScore MobiLens, August 2014 (three-month average), mobile internet users aged 13+

## Figure 5.31

### The internet as a primary source of news

Proportion of respondents claiming internet was their primary source of world/national/local news (%)



Source: Ofcom consumer research October 2014

Base: All respondents, UK=1000, FRA=1007, GER=1010, ITA=1010, USA=1004, JPN=1005, AUS=1007, ESP=1020, CHN=1007.

Q.11 Which, if any, is your main source for the following information?