1. UK in context

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Figure 1.1

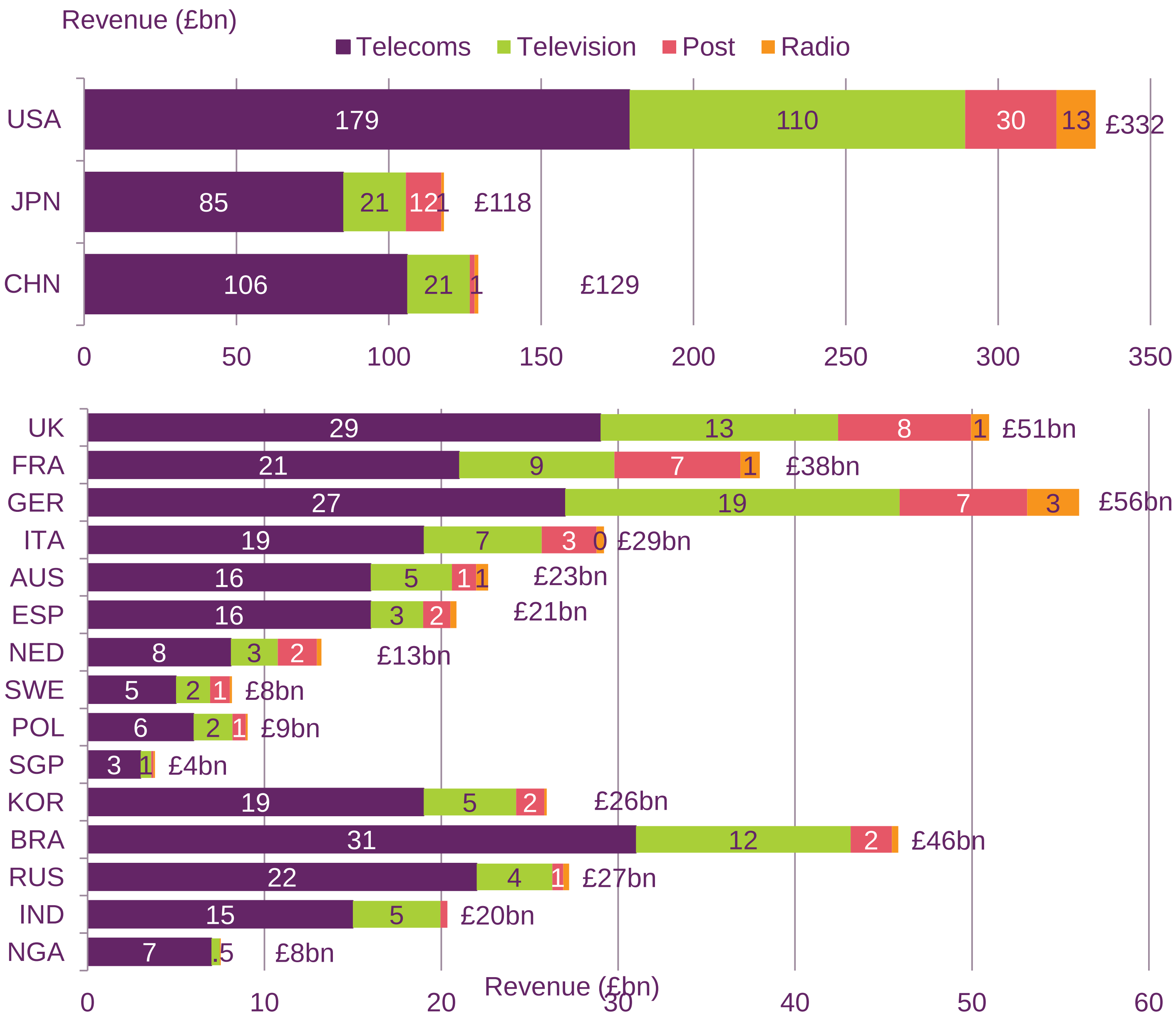
Global communications revenue

	Year-on-year growth	CAGR 2009-2013
Radio	2.7%	2.3%
Post	-0.6%	-1.6%
Television	3.1%	5.1%
Telecoms	2.1%	2.3%
All	2.1%	2.5%

Source: Data derived from various sources: PwC Global Entertainment and Media Outlook 2014-2018 @ www.pwc.com/outlook for television and radio revenues (both include advertising, license fees and subscription services only), Wik Consult / Ofcom estimates for postal revenues. IHS / industry data / Ofcom for telecoms revenues, which refer to retail revenues for fixed voice, broadband and mobile services. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used IMF 2013 average exchange rates in converting from local currency to GBP.
Note: Postal revenues are for our 17 comparator countries only.

Figure 1.2

Communications sector revenues: 2013



Source: Data derived from various sources: PwC Global Entertainment and Media Outlook 2014-2018 @ www.pwc.com/outlook for radio revenues (include advertising, license fees and satellite subscription services only), Wik Consult / Ofcom estimates for postal revenues, IHS / industry data / Ofcom for television and telecoms revenues (telecoms revenues refer to retail revenues). Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used IMF 2013 average exchange rates in converting from local currency to GBP.
Note: Postal revenue data is not available for Nigeria

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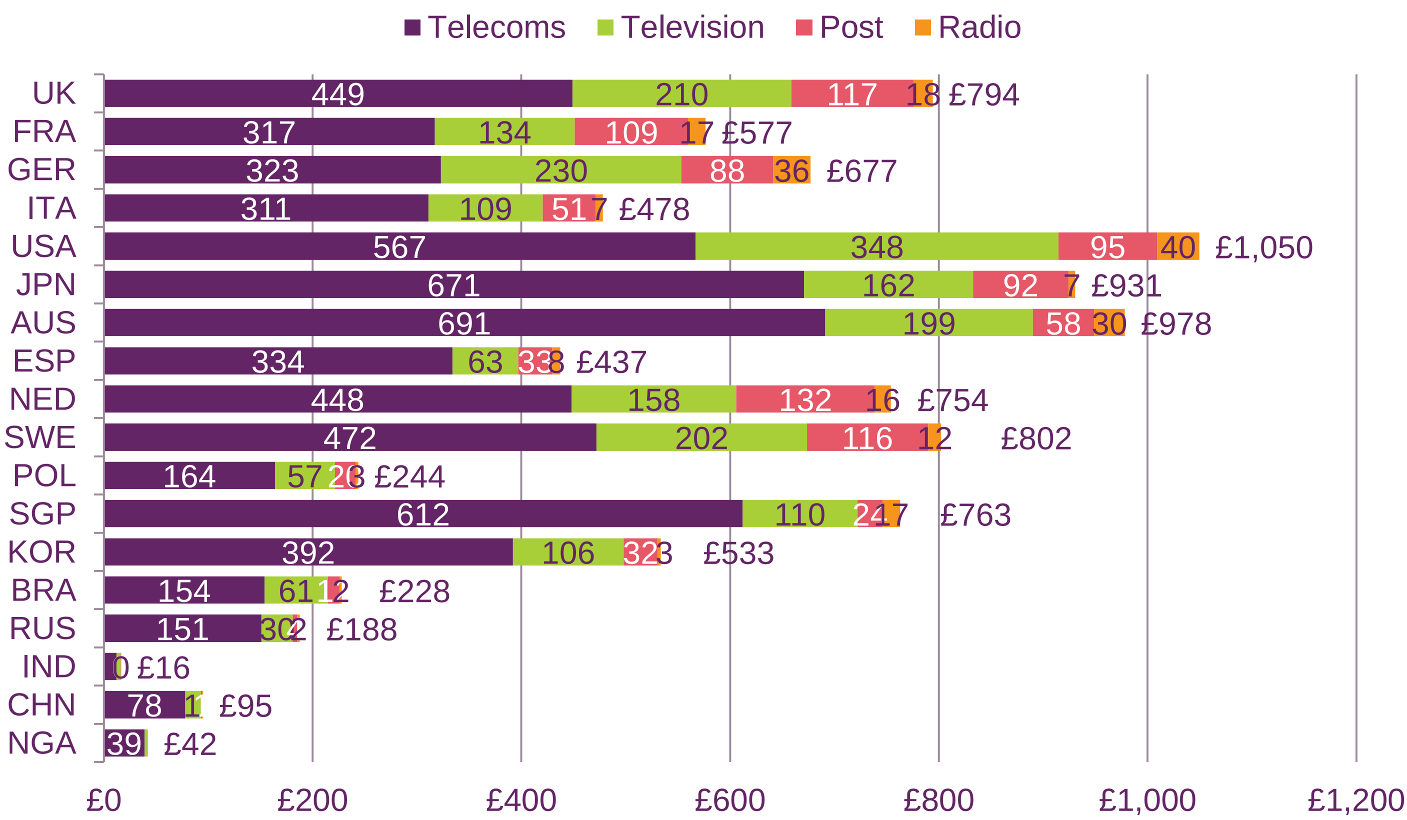
Figure 1.3

Communications sector revenues per head: 2013



Source: Data derived from various sources: Ofcom analysis based on data from PwC's Global Entertainment and Media Outlook 2014-2018 @ www.pwc.com/outlook for radio revenues (include advertising, license fees and satellite subscription services only), Wik Consult / Ofcom estimates for postal revenues (no postal data available for Nigeria). IHS / industry data / Ofcom for television and telecoms revenues (telecoms revenues refer to retail revenues). Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used IMF 2013 average exchange rates in converting from local currency to GBP. Figures adjusted using data from http://stats.oecd.org

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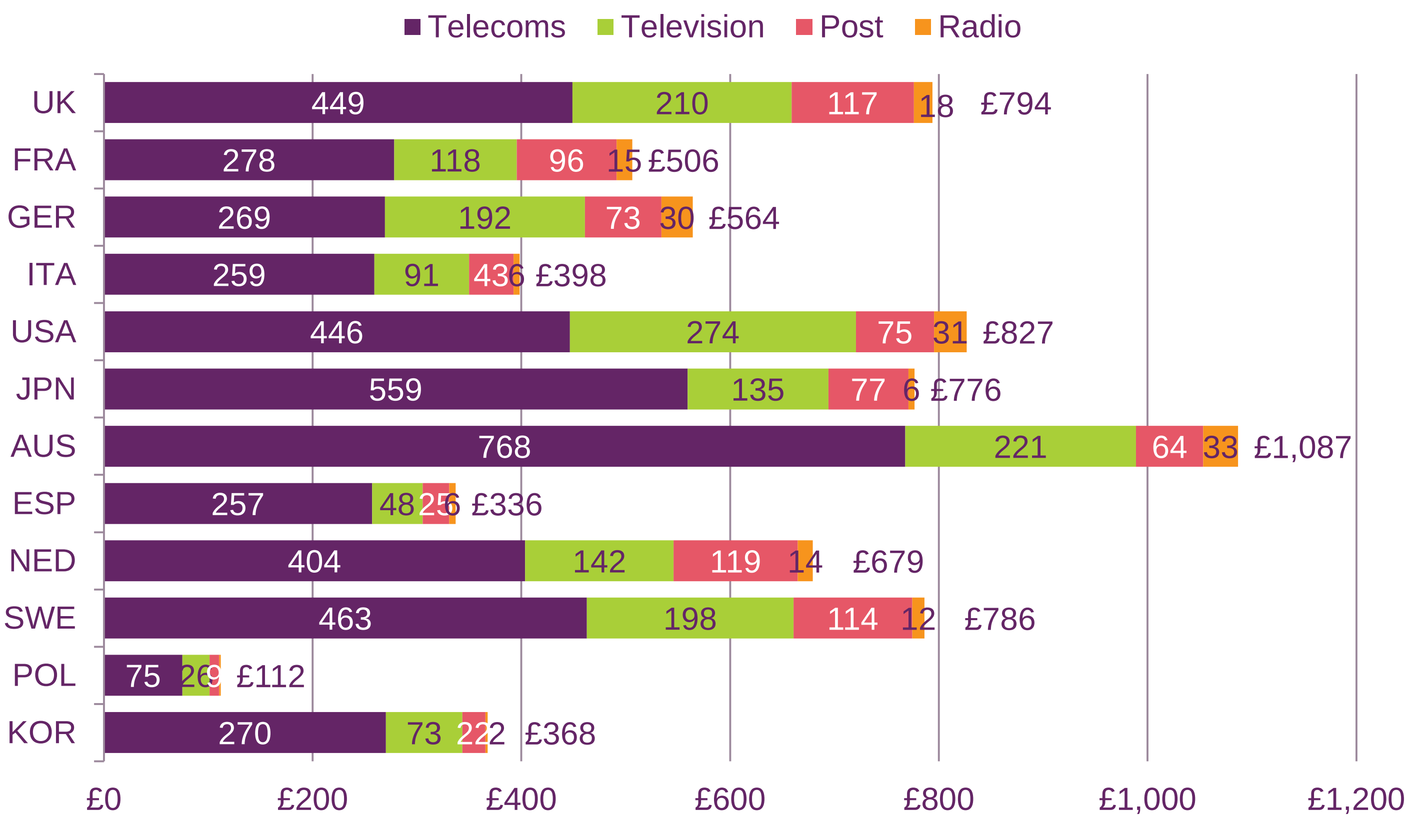
Figure 1.4

Communications revenues per head adjusted for comparative price levels : 2013



Source: Data derived from various sources: Ofcom analysis based on data from PwC's Global Entertainment and Media Outlook 2014-2018 @ www.pwc.com/outlook for radio revenues (include advertising, license fees and satellite subscription services only), Wik Consult / Ofcom estimates for postal revenues. IHS / industry data / Ofcom for television and telecoms revenues (telecoms revenues refer to retail revenues). Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used IMF 2013 average exchange rates in converting from local currency to GBP. Figures adjusted using data from http://stats.oecd.org
Note: Postal revenue data is not available for Nigeria

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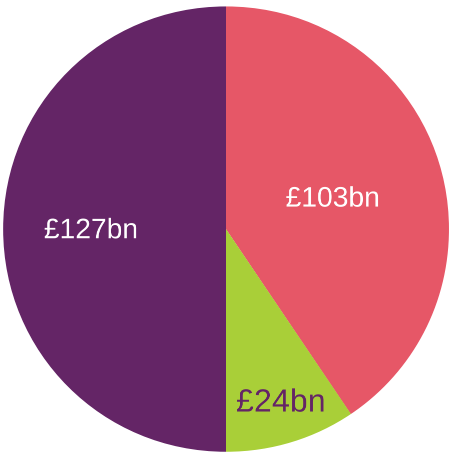
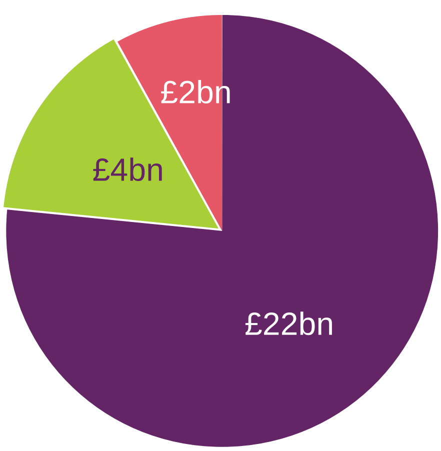
Figure 1.5

Sources of global revenue for television and radio industries: 2013



	Year-on-year growth	CAGR 2009-2013
Broadcast television advertising	1.9%	5.3%
Television public licence fee	1.6%	1.5%
Television subscriptions	4.4%	5.7%

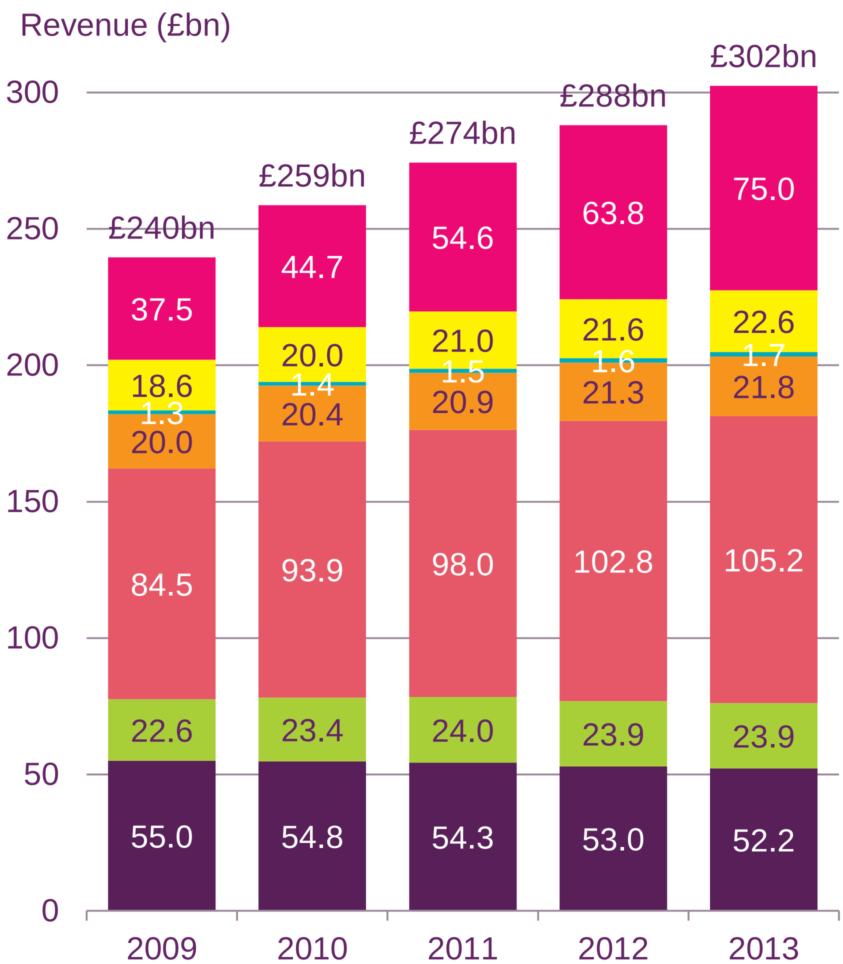


	Year-on-year growth	CAGR 2009-2013
Radio advertising	2.5%	2.2%
Radio public licence fee	0.3%	0.1%
Satellite Radio subscriptions	9.9%	9.3%

Source: All data derived from PwC Global Entertainment and Media Outlook: 2014-2018 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.563 to the GBP in line with the IMF average for 2013.

Figure 1.6

Global advertising expenditure, by medium: 2013



	Year-on-year growth	CAGR 2009-2013
Internet	17.6%	18.9%
Outdoor	4.6%	5.1%
Cinema	4.2%	6.1%
Radio	2.5%	2.2%
Television	2.4%	5.6%
Magazines	0.1%	1.4%
Newspapers **All**	-1.4%	-1.3%
All	5.0%	6.0%

Source: Data derived from PwC Global Entertainment and Media Outlook: 2014-2018 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.563 to the GBP in line with the IMF average for 2013.

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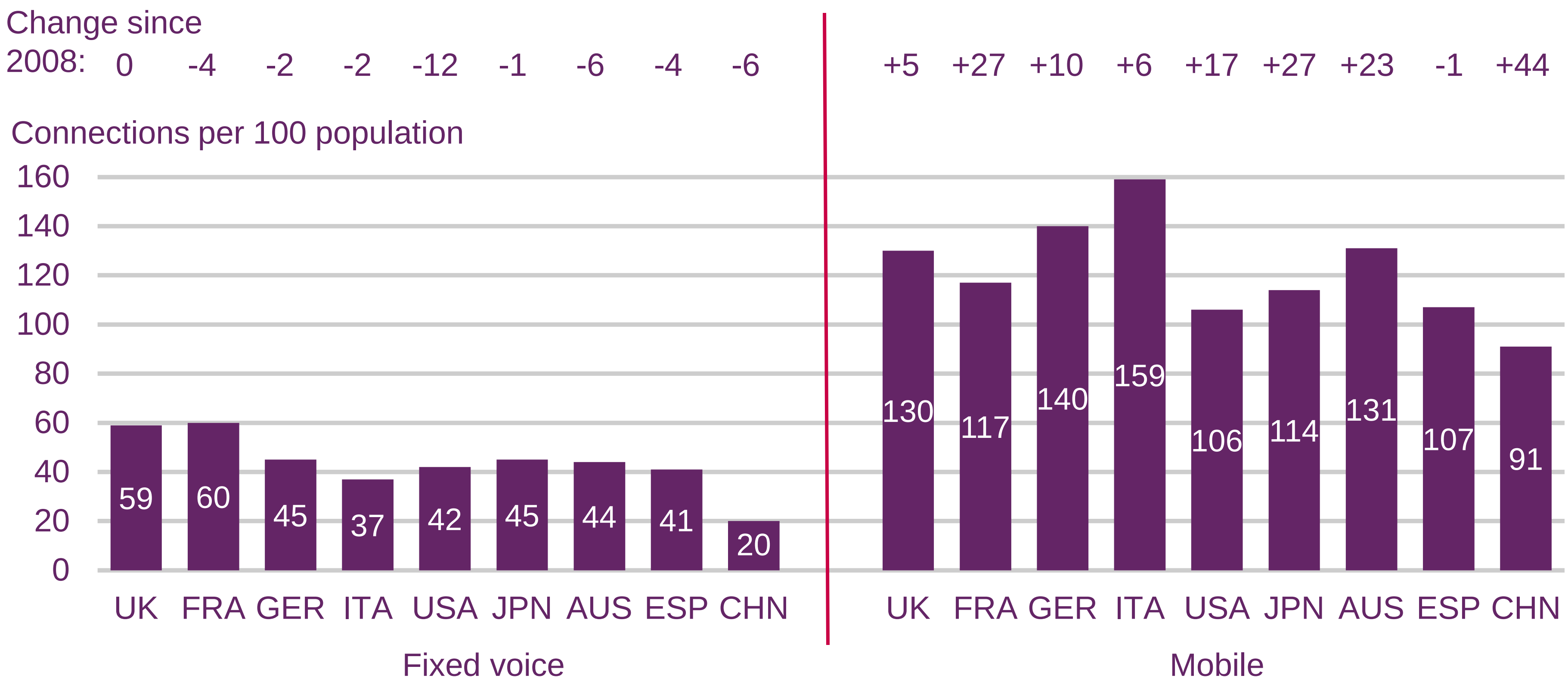
Figure 1.7

Fixed voice and mobile connections per head: 2013



Source: IHS / industry data / Ofcom

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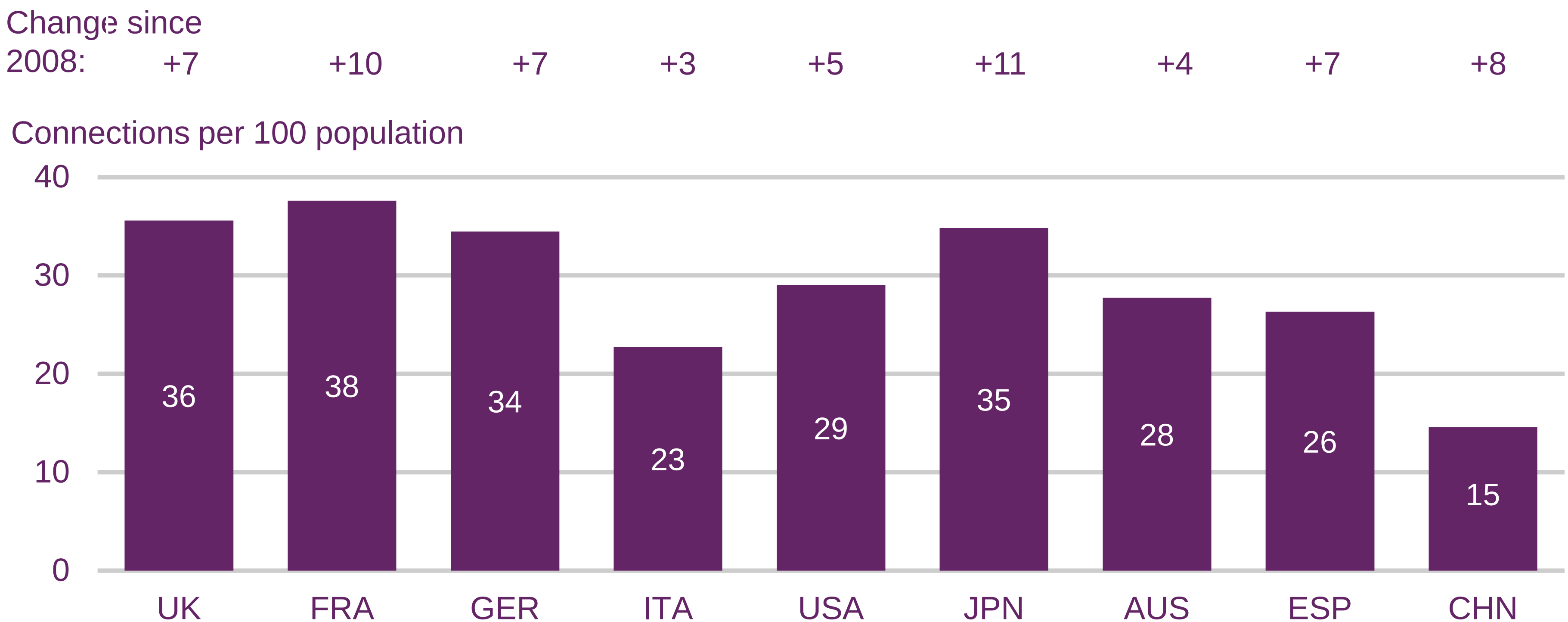
Figure 1.8

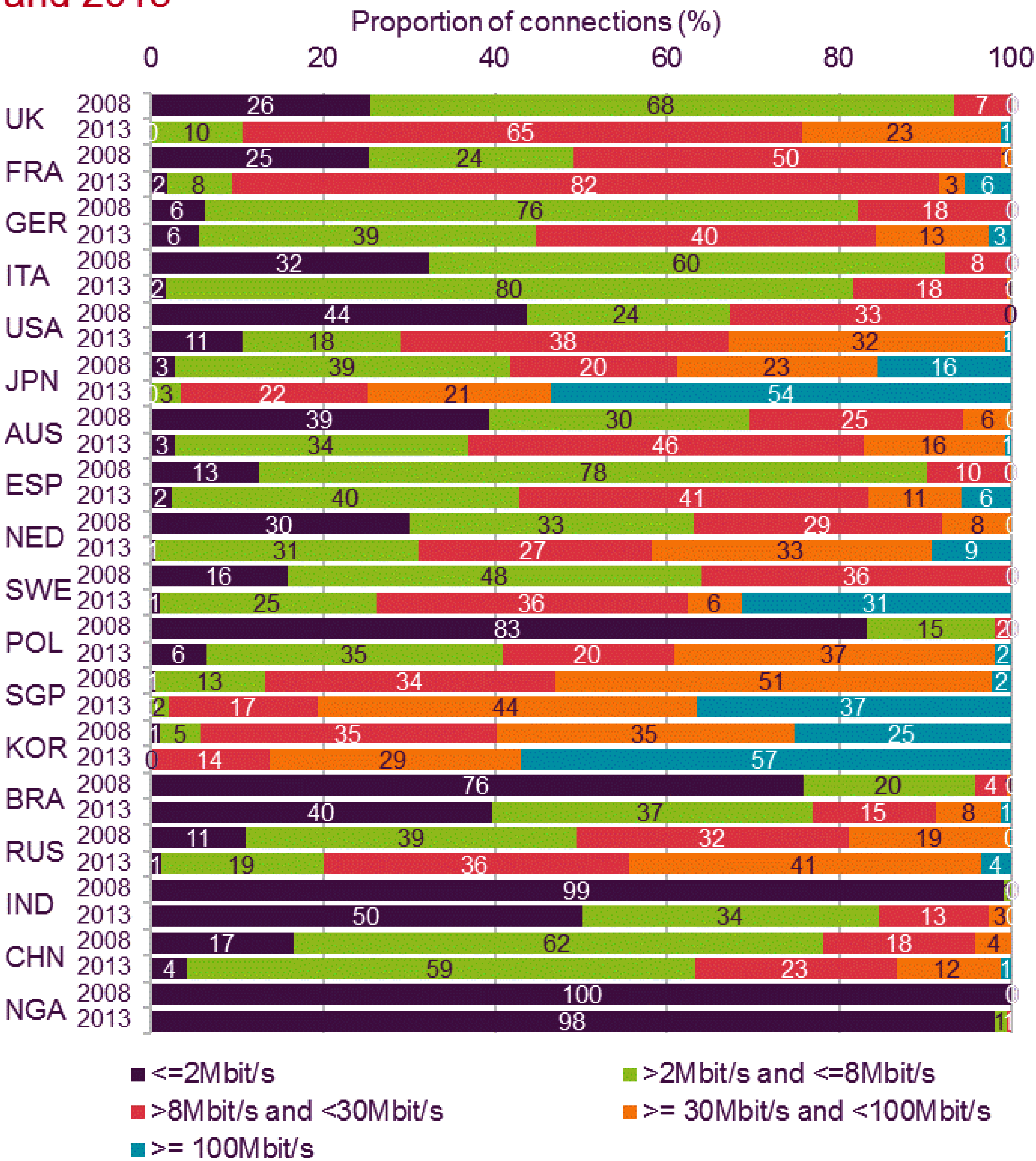
Fixed broadband connections per 100 population: 2013



Source: IHS / industry data / Ofcom. Note: Broadband connections include business connections

Figure 1.9

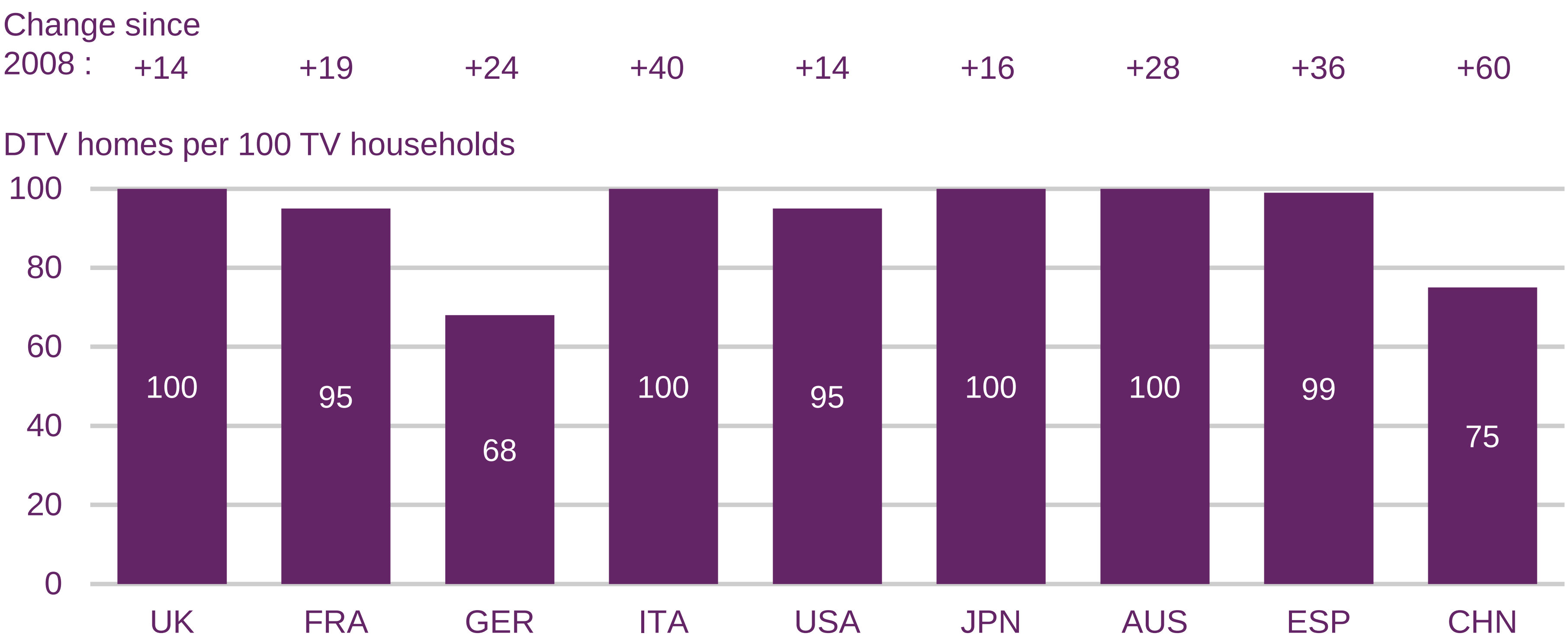
Fixed broadband connections, by headline speed: 2008 and 2013



Source: IHS / Ofcom / operator data

Figure 1.10

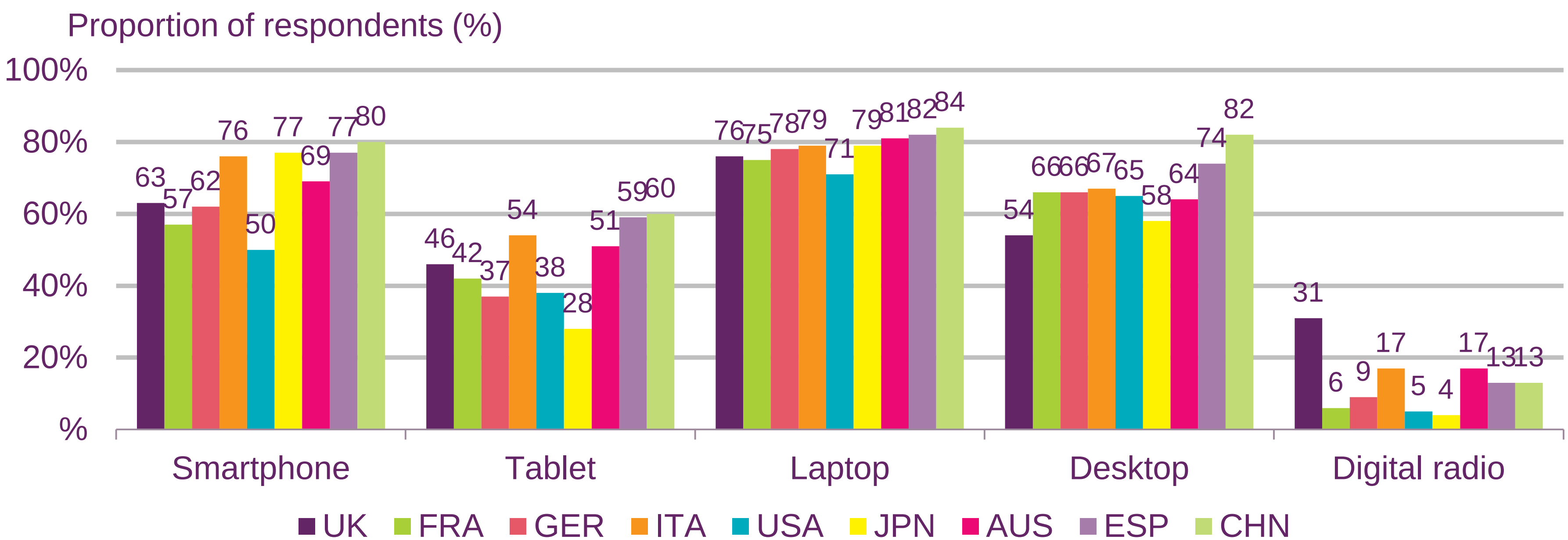
Digital TV homes per 100 TV households: 2013



Source: IHS / industry data / Ofcom.

Figure 1.11

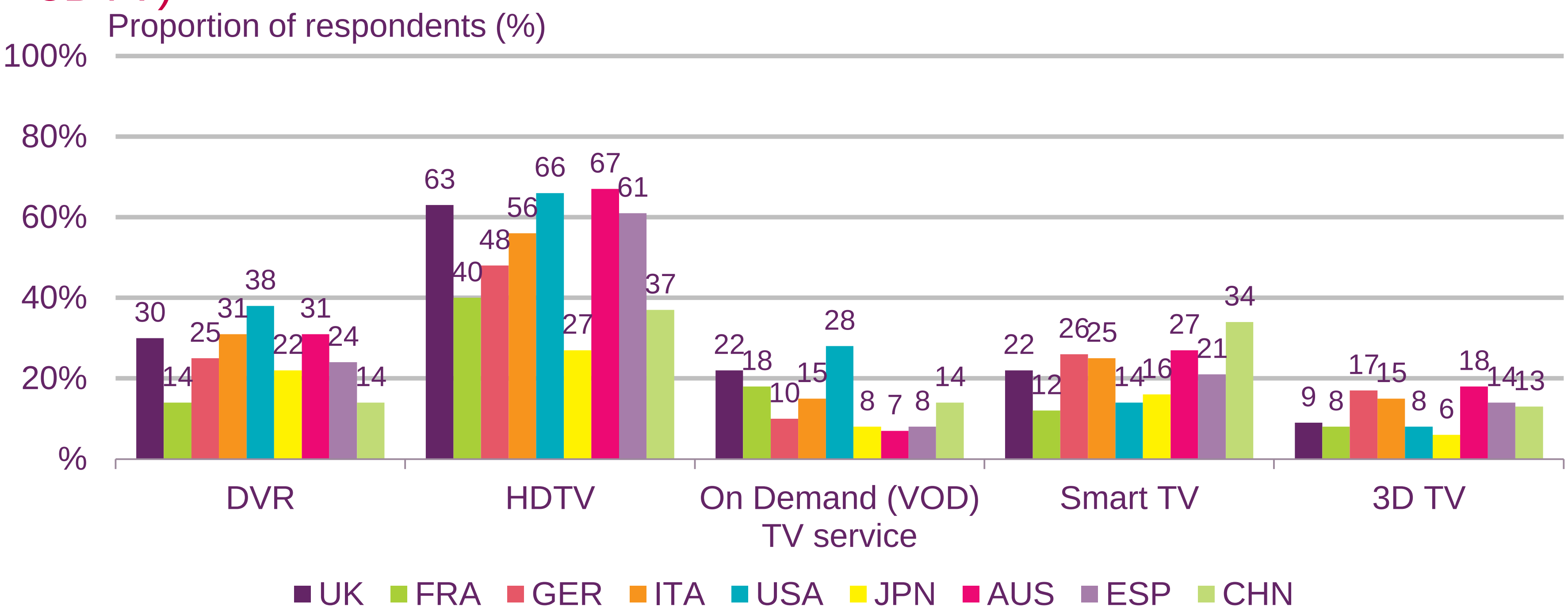
Ownership and personal use of devices



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 *Q3a. Which of the following devices do you have in your home? (Tablet, Laptop, Desktop, Digital radio, DVR, HDTV, Smart TV, 3D TV) Q.4a Which of the following devices do you personally use? (Smartphone)*

Figure 1.12

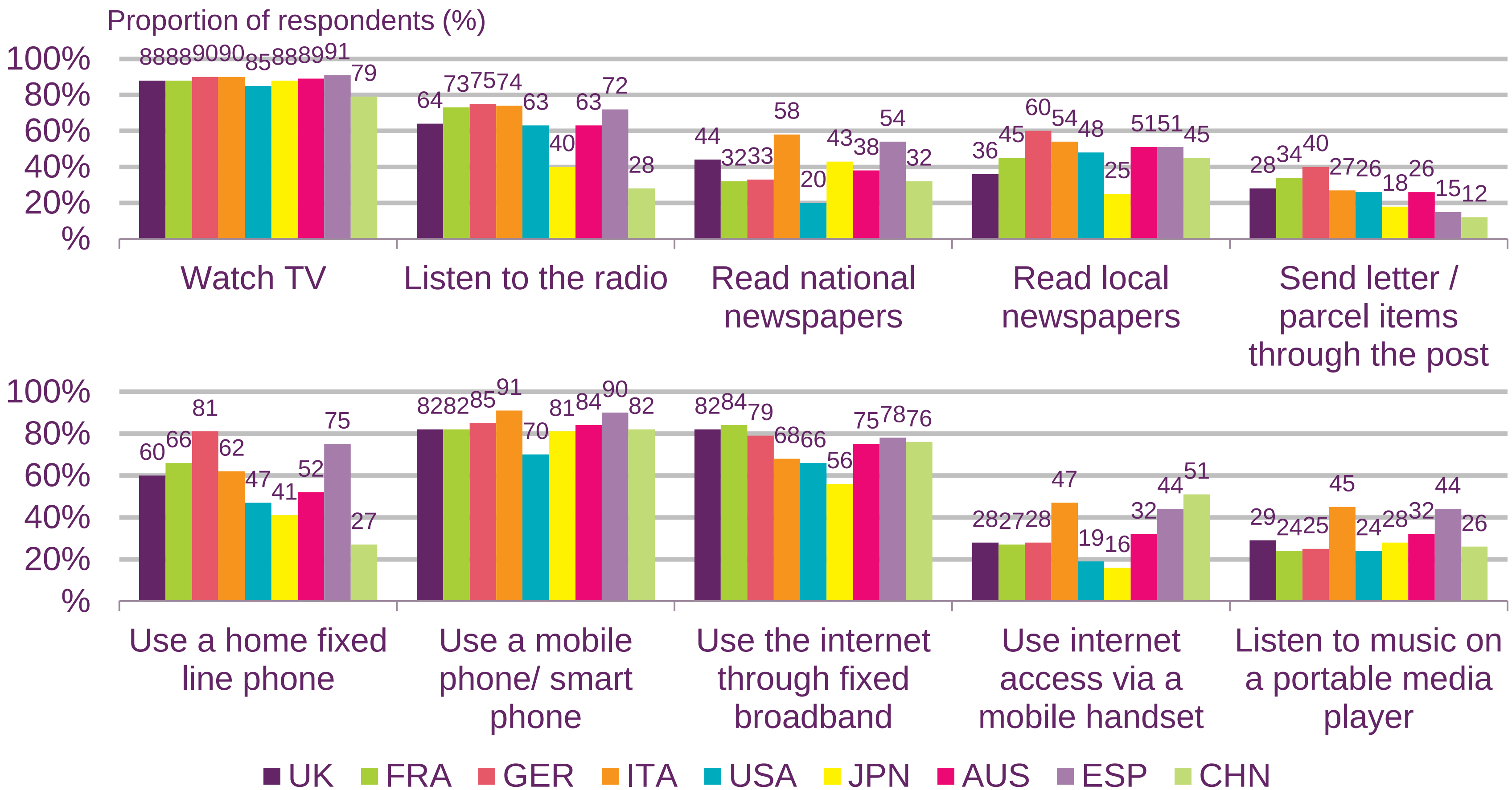
Ownership and personal use of devices (DVR, HDTV, VoD, smart TV and 3DTV)



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.
Q3a. Which of the following devices do you have in your home? (DVR, HDTV, Smart TV, 3D TV) Q3b. Which of the following services do you have in your home (Video on Demand (VoD Service)

Figure 1.13

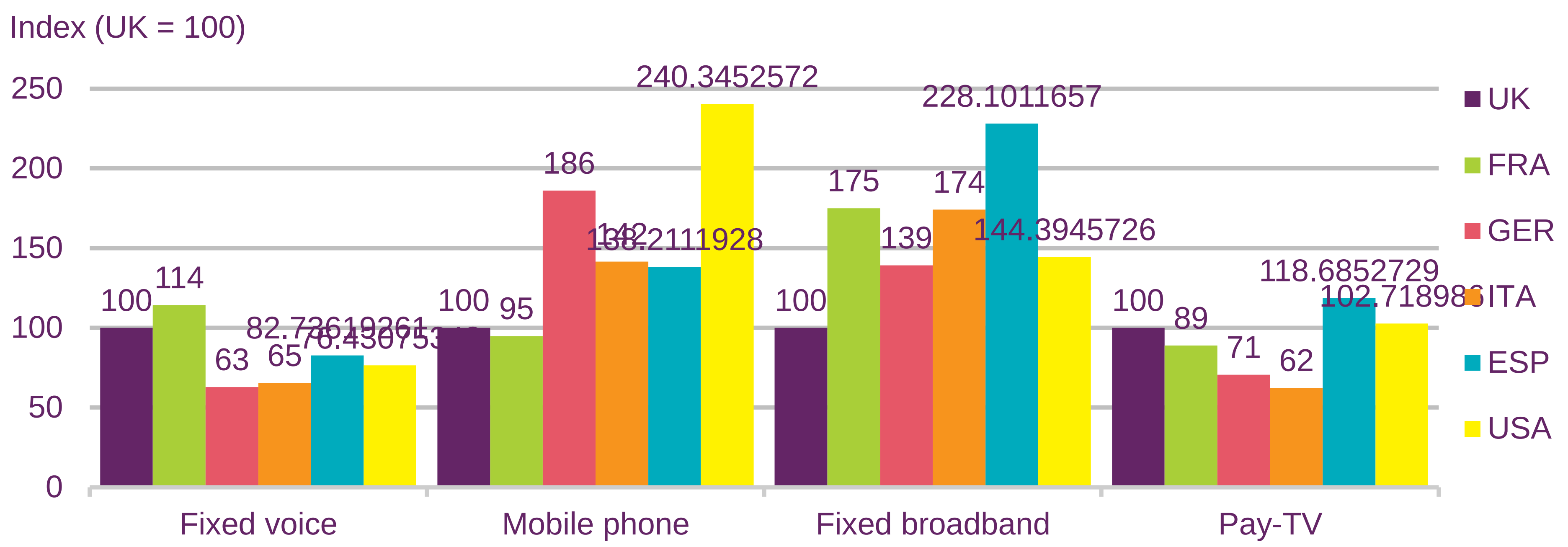
Regular use of selected communications services / media



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.6 Which of the following do you regularly do (at least once a week)?

Figure 1.14

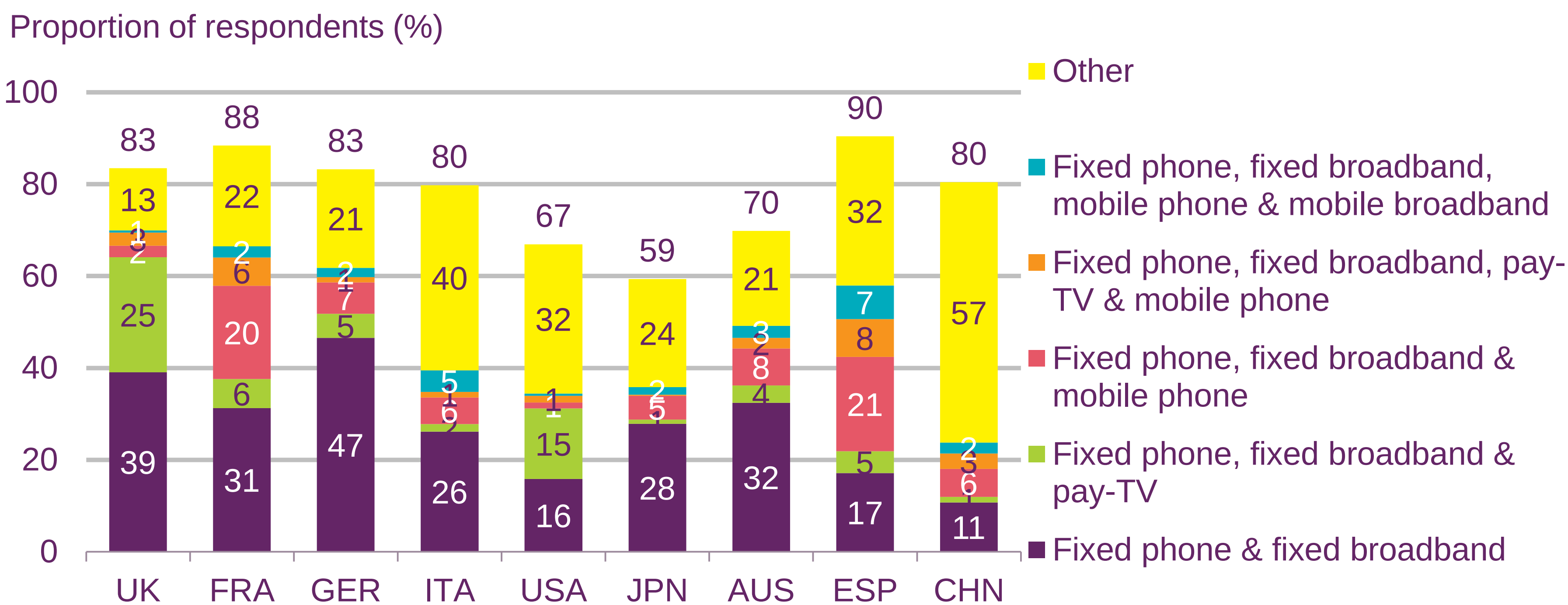
Comparison of ‘lowest available’ stand-alone pricing



Source: Ofcom, using data supplied by Teligen
Note: Excludes the TV licence fee (where applicable)

Figure 1.15

Proportion of consumers buying more than one communications service from the same provider



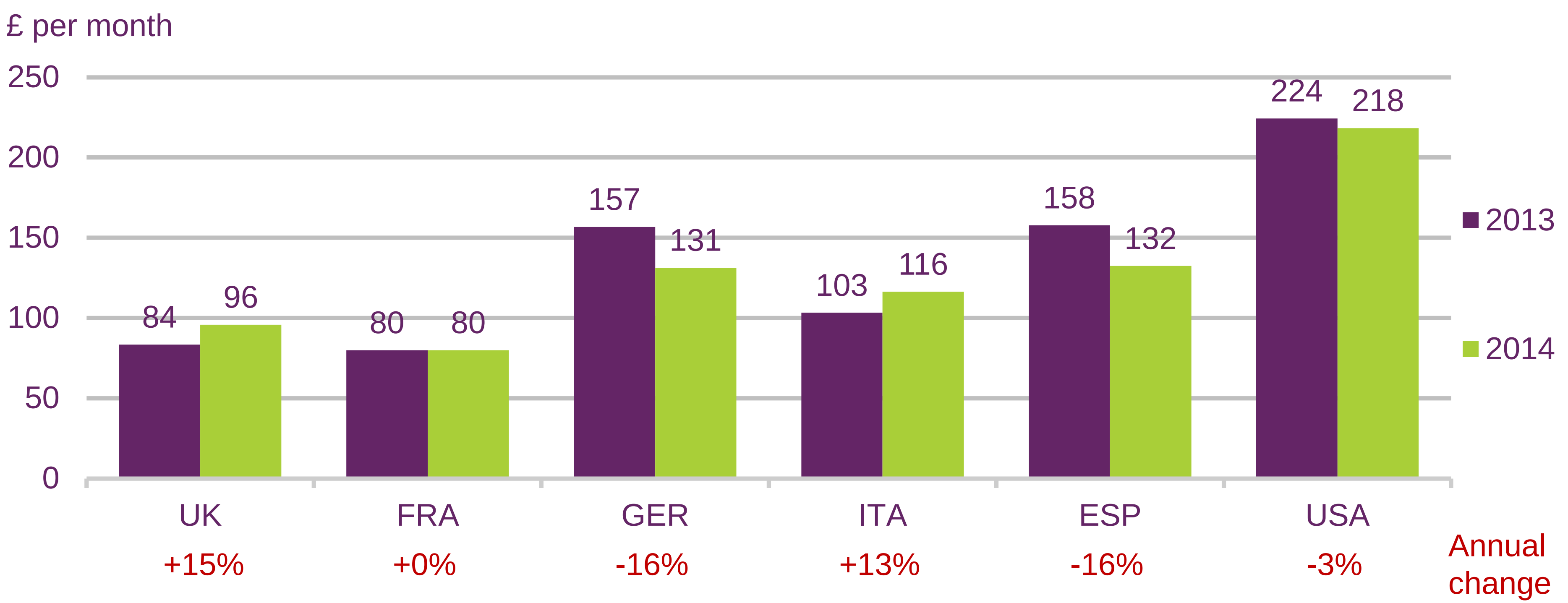
Source: Ofcom consumer research October 2014

Base: All respondents with more than one service, UK=956, FRA=945, GER=941, ITA=931, USA=845, JPN=798, AUS=914, ESP=947, CHN=854

Q.5 Do you receive a package or bundle of two or more of these services from the same supplier?

Figure 1.16

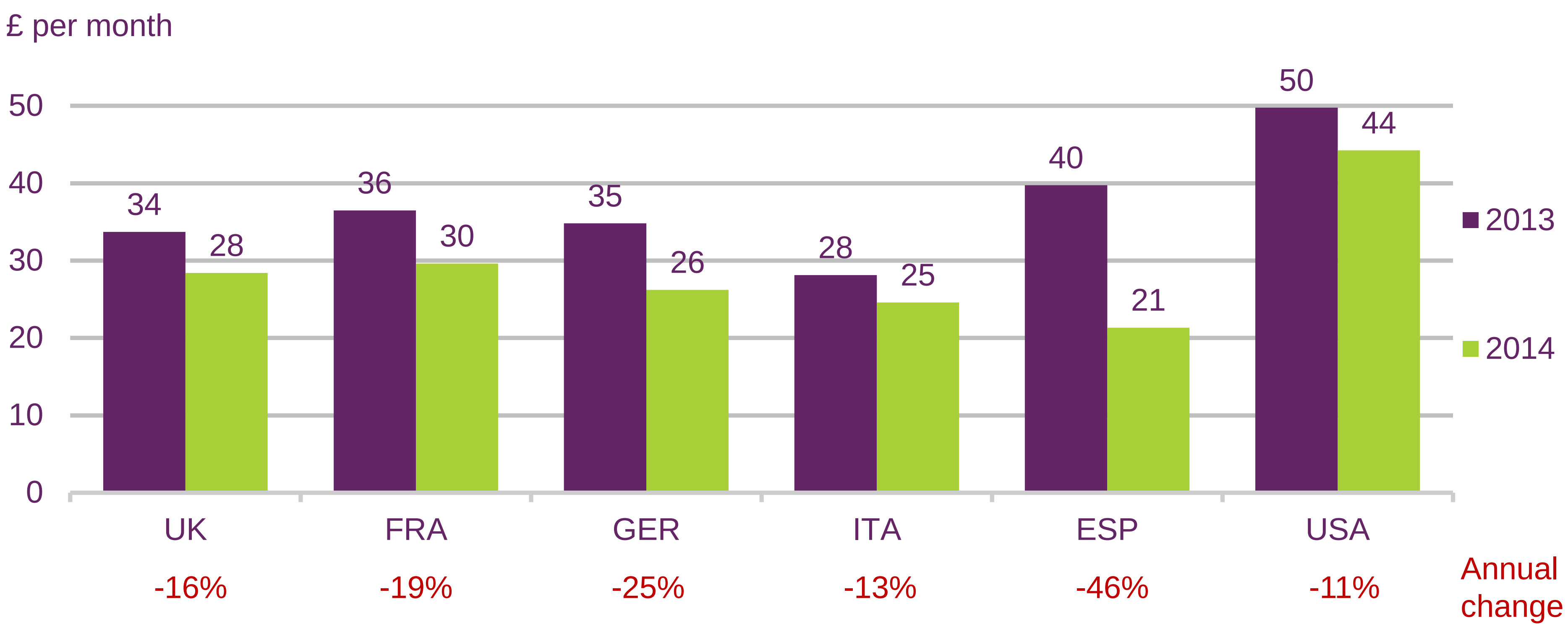
'Lowest available' (including bundles) pricing for the 'connected family' household



Source: Ofcom, using data supplied by Teligen / OECD
Note: Excludes the TV licence fee.

Figure 1.17

‘Lowest available’ (including bundles) comparative pricing for the ‘basic needs’ household



Source: Ofcom, using data supplied by Teligen
Note: Excludes the TV licence fee.

Figure 1.18

Comparison of international pricing: 2014

	'Basic needs' household		'Late adopters' household		'Mobile power user' household		'Connected family' household		'Sophisticated couple' household	
Price (£ per month)	'Weighted average'	'Lowest available'	'Weighted average'	'Lowest available'	'Weighted average'	'Lowest available'	'Weighted average'	'Lowest available'	'Weighted average'	'Lowest available'
UK	40	28	61	40	81	69	150	96	172	121
FRA	42	30	69	33	81	60	174	80	168	108
GER	44	26	94	47	130	101	261	131	216	126
ITA	46	25	79	41	91	75	207	116	178	103
ESP	49	21	87	50	128	106	223	132	187	143
US	75	44	112	87	153	118	286	218	275	214

Source: Ofcom / Teligen

Note: Green circle indicates the lowest pricing across all six countries included in this analysis

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Figure 1.19

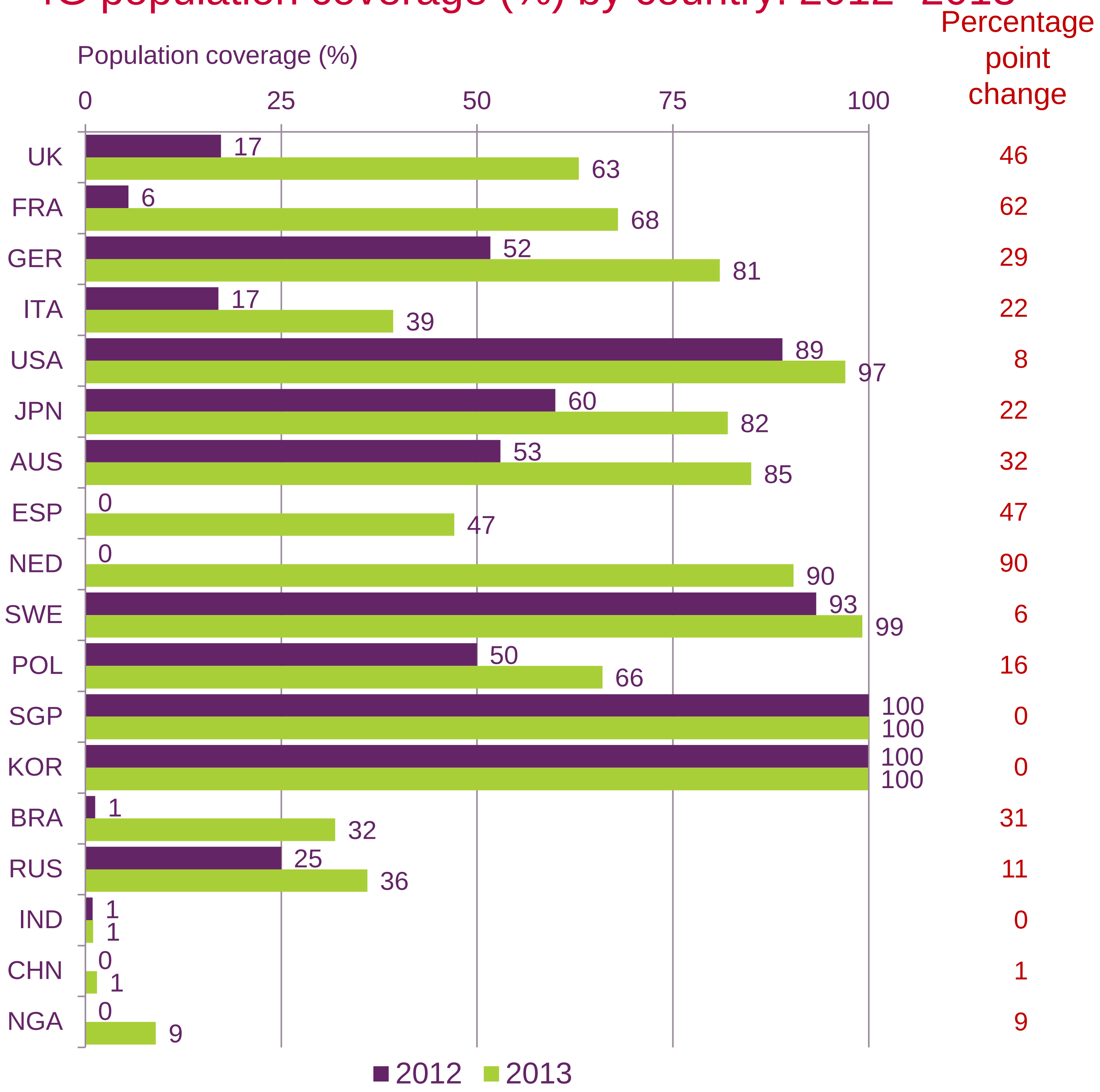
Average overall rank based on ‘weighted average’ stand-alone and lowest available prices, available across all five households: 2013 and 2014

2014 rank	Country	Average rank 2013	Average rank 2014
1=	UK	1.9	1.9
1=	FRA	2.4	1.9
3	ITA	2.0	2.8
4=	GER	4.0	4.2
4=	ESP	4.8	4.2
6	USA	5.9	6.0

Source: Ofcom / Teligen

Figure 1.20

4G population coverage (%) by country: 2012- 2013



Source: IHS

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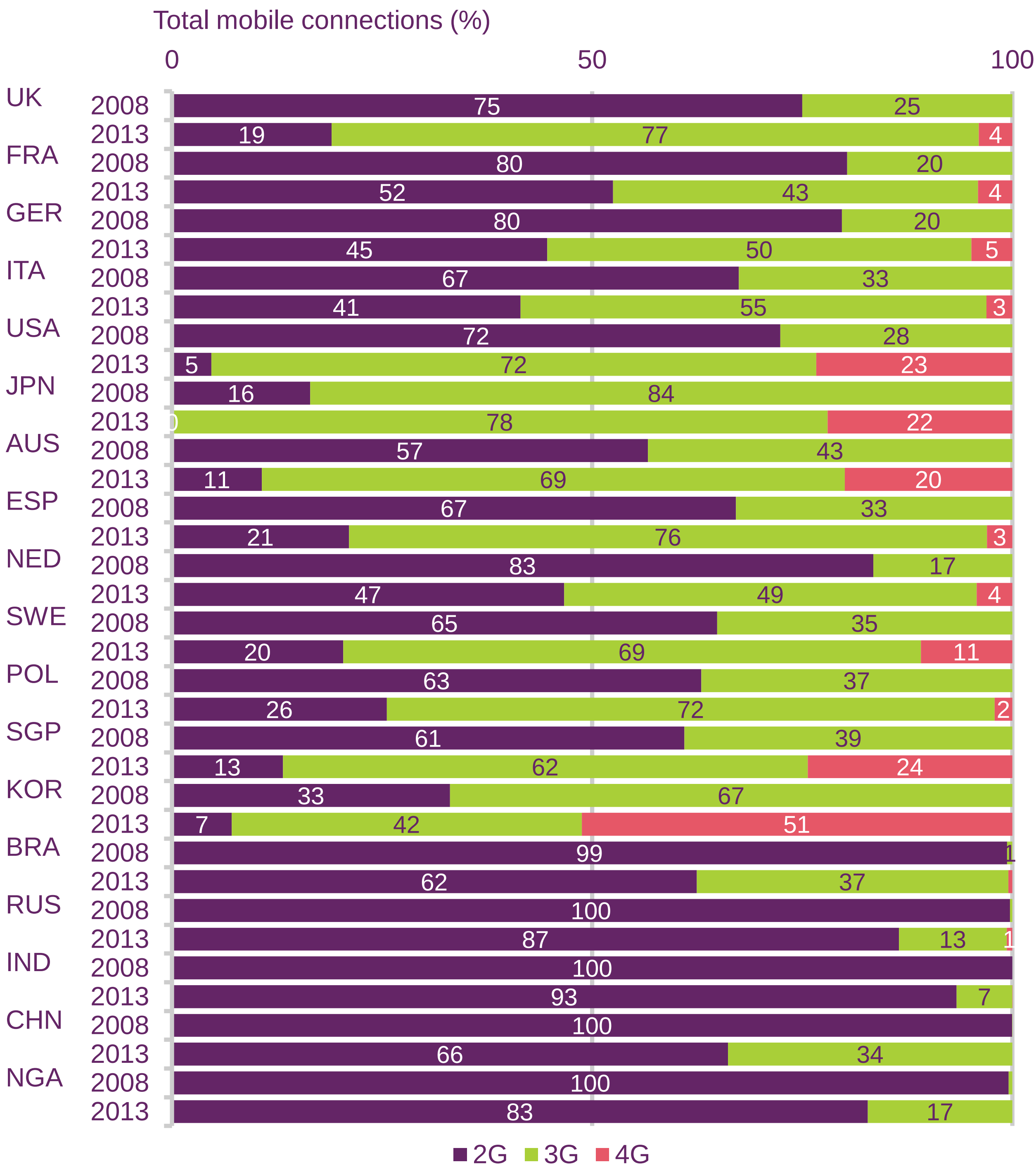
Figure 1.21

Mobile connections by technology: 2008 and 2013



Source: IHS / industry data / Ofcom

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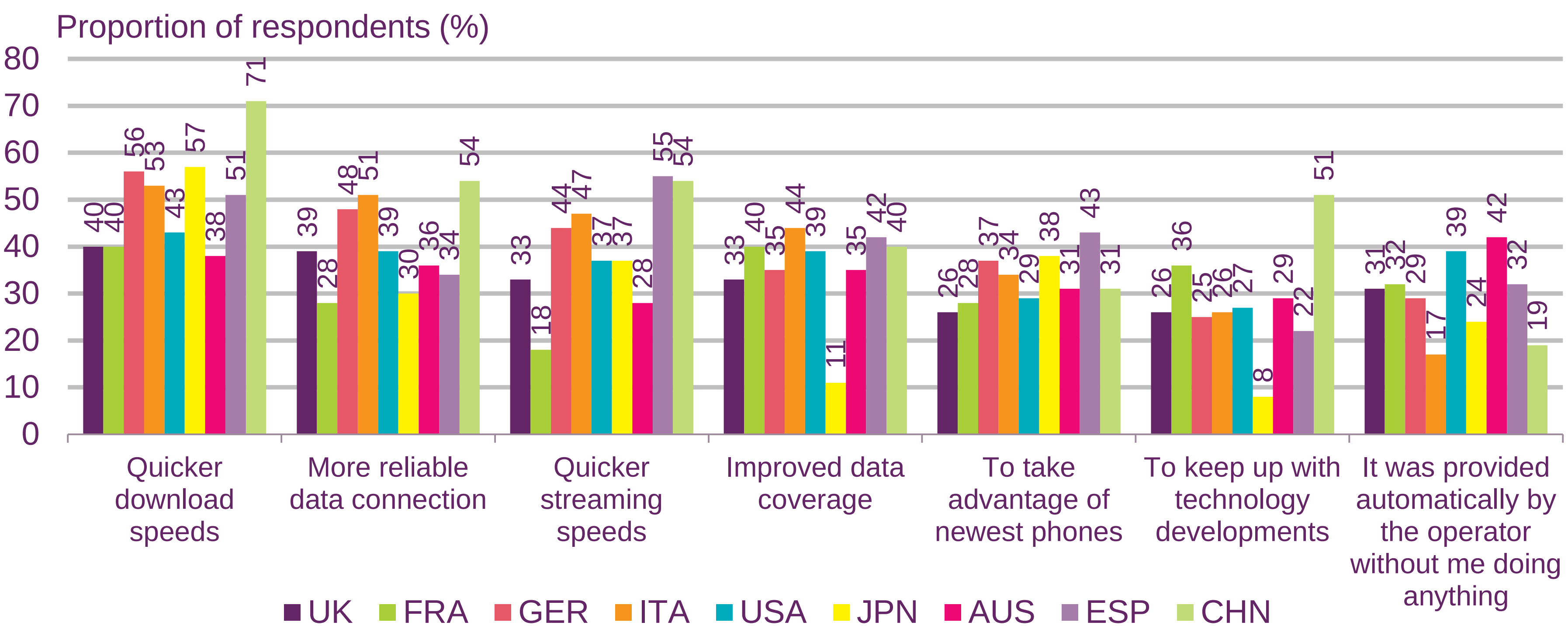
Figure 1.22

Reasons for choosing 4G



Source: Ofcom consumer research October 2014
Base: All respondents who have or are likely to get 4G, UK=285, FRA=293, GER=192, ITA=362, USA=409, JPN=259, AUS=440, ESP=406, CHN=539
Q.23 You said that you have/ are likely to get a 4G service [in the next 12 months]. Which of the following are reasons why you got/ are likely to get a 4G contract?

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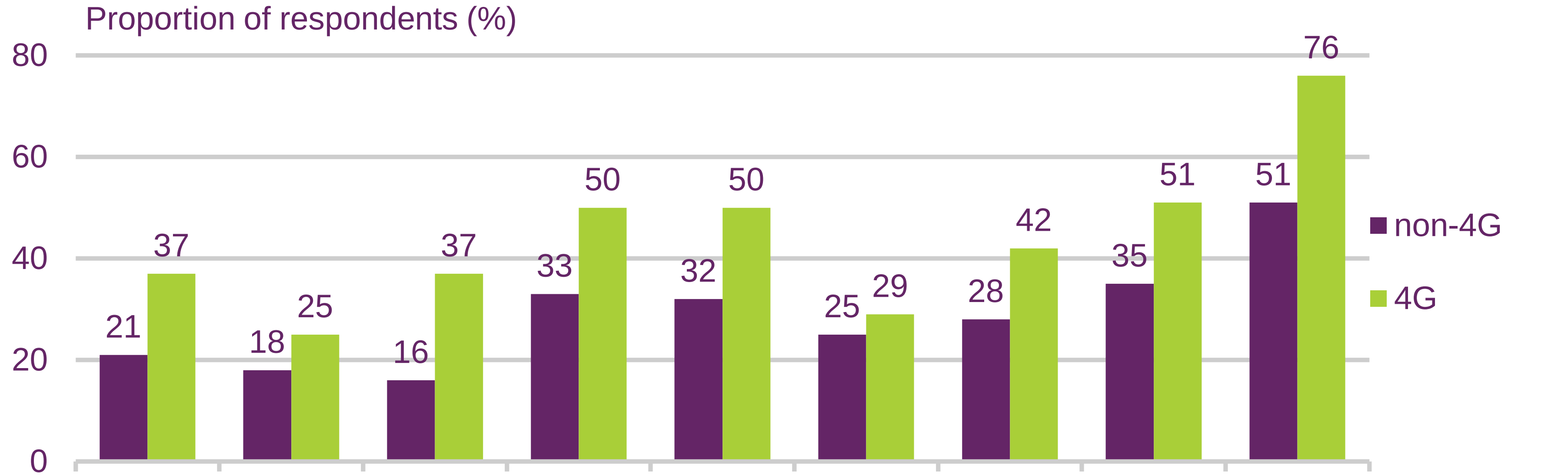
Figure 1.23

Proportion of respondents video streaming/downloading on a mobile phone at least weekly, among 4G and non-4G users

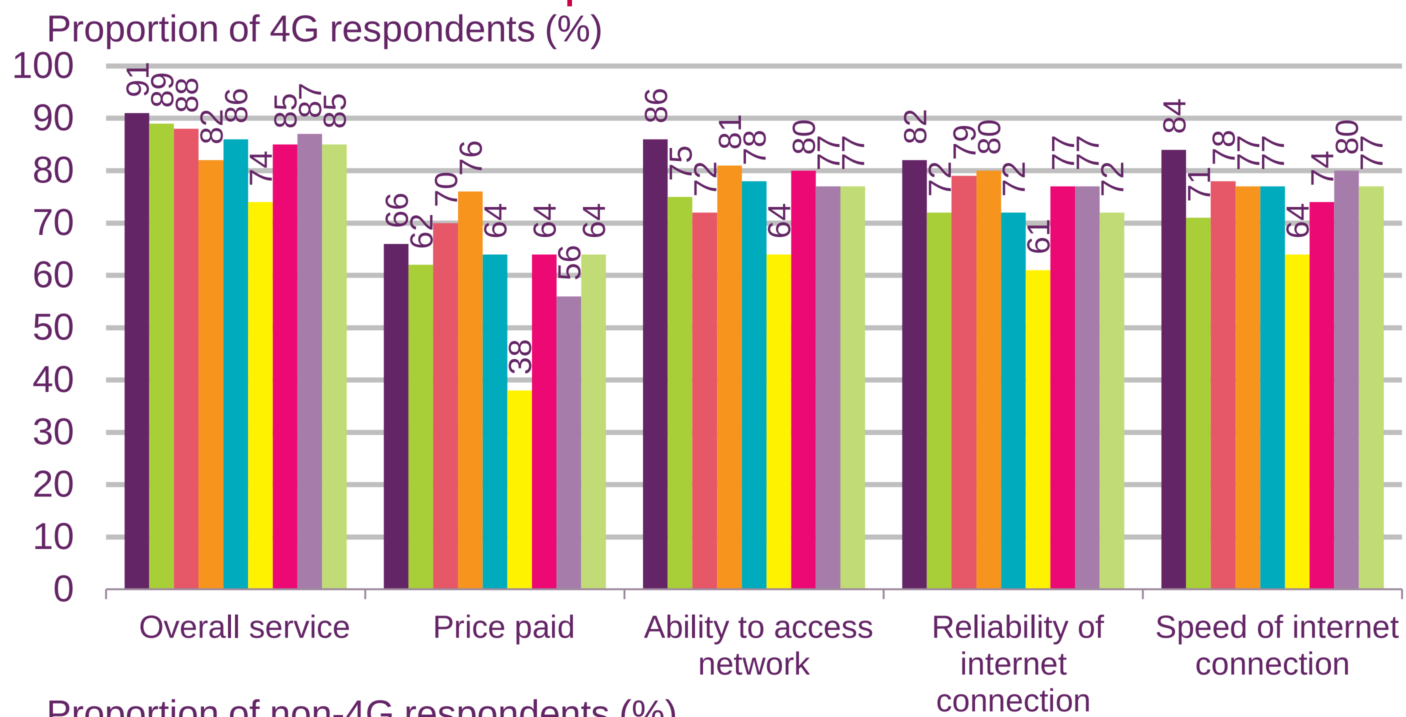


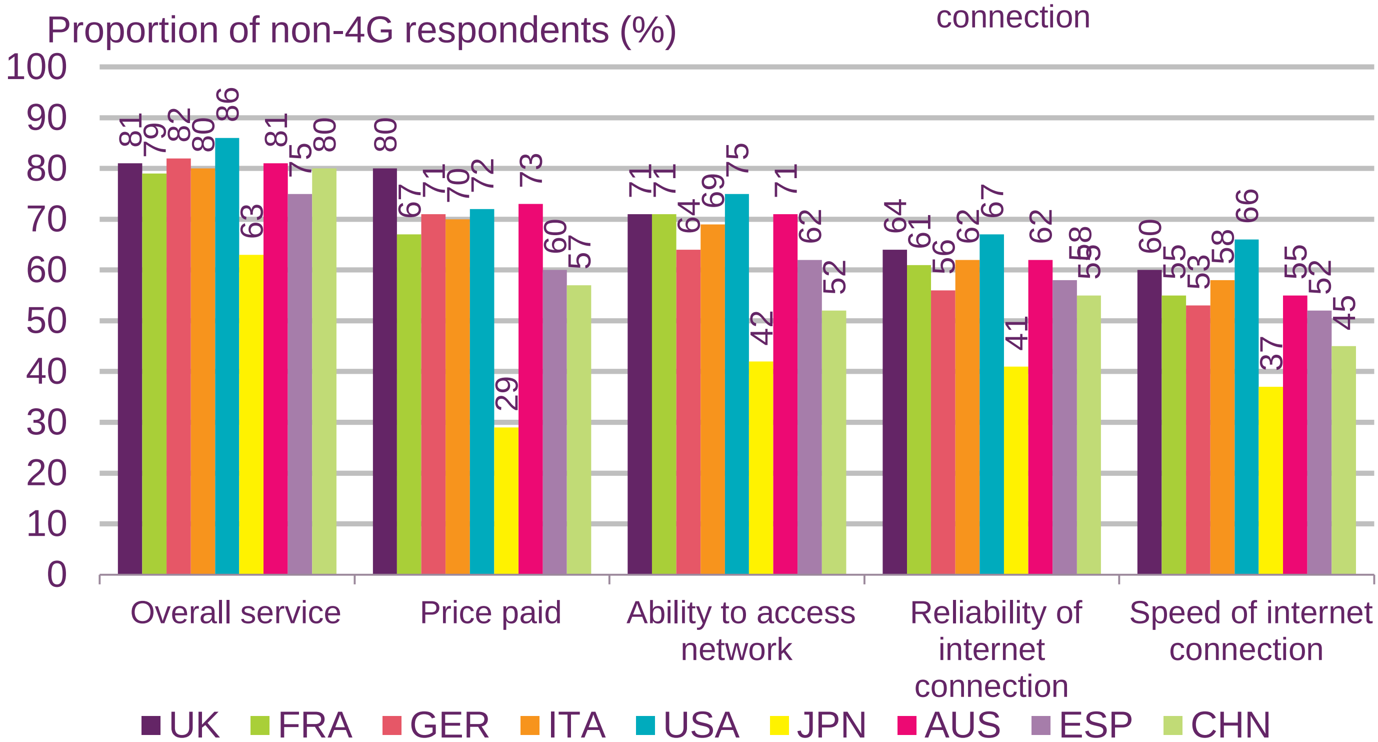
Percentage point difference	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	CHN
	16	7	21	17	18	4	14	16	25

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.
Q3b. Which of the following SERVICES do you have in your home? Q9a. Which, if any, of the following internet activities do you use each of your devices for?

Figure 1.24

Satisfaction with mobile phone services





Source: Ofcom consumer research October 2014 Base (4G): All respondents with mobile broadband internet access or those who access the internet access via a mobile handset on a 4G network, UK=81, FRA=99, GER=54, ITA=83, USA=136, JPN=93, AUS=164, ESP=113, CHN=132. PLEASE NOTE: low base sizes
Base (non-4G): All respondents with mobile broadband internet access or those who access the internet access via a mobile handset not on a 4G network, UK=252, FRA=261, GER=315, ITA=562, USA=138, JPN=140,

AUS=282, ESP=491, CHN=431 Q.25 To what extent are you satisfied or dissatisfied with the following aspects of your mobile phone service?

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Figure 1.25

Levels of interest in types of news

	UK	FRA	GER	ITA	US	JPN	ESP	Urban BRA
News about the country	71%	64%	67%	59%	57%	52%	63%	66%
International news	49%	52%	64%	49%	39%	43%	45%	41%
Local news about my town or city	46%	37%	47%	45%	57%	31%	42%	47%
News about my region	38%	41%	51%	38%	31%	33%	42%	12%
Business and financial news	21%	15%	17%	15%	20%	26%	13%	29%
News about the economy	39%	27%	29%	33%	46%	44%	38%	34%
Entertainment and celebrity news	17%	13%	15%	13%	15%	24%	14%	22%
Fun/weird news	15%	22%	14%	21%	16%	28%	18%	15%
Health and education news	28%	31%	30%	38%	28%	30%	37%	57%
Arts and culture news	12%	15%	9%	24%	10%	15%	19%	27%
Sports news	29%	25%	28%	29%	20%	28%	35%	30%
News about the country's politics	37%	45%	51%	54%	46%	52%	40%	37%
Science and technology news	25%	28%	27%	35%	28%	26%	33%	43%

Source: Reuters Institute / YouGov research Jan/Feb 2014
Q: Which of the following types of news is most important to you? Choose up to five.
Base: UK (n=2082) France (n=1946) Germany (n=2063) Italy (n=2010) US (n=2197) Japan (n=1973) Spain (n=2017) urban Brazil(1015)

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Figure 1.26

Main online source of news, by country

	UK	FRA	GER	ITA	USA	JPN	ESP	Urban BRA
Computer	57%	61%	60%	69%	69%	79%	63%	62%
Smartphone	24%	22%	24%	19%	17%	15%	22%	18%
Tablet	16%	8%	9%	8%	10%	3%	9%	8%

Source: Reuters Institute / YouGov research Jan/Feb 2014
Q8b.5 You say you use the following devices to access news in the last week, which is your MAIN way of accessing online news?
Base: UK (n=2082) France (n=1946) Germany (n=2063) Italy (n=2010) US (n=2197) Japan (n=1973) Spain (n=2017) urban Brazil(1015)

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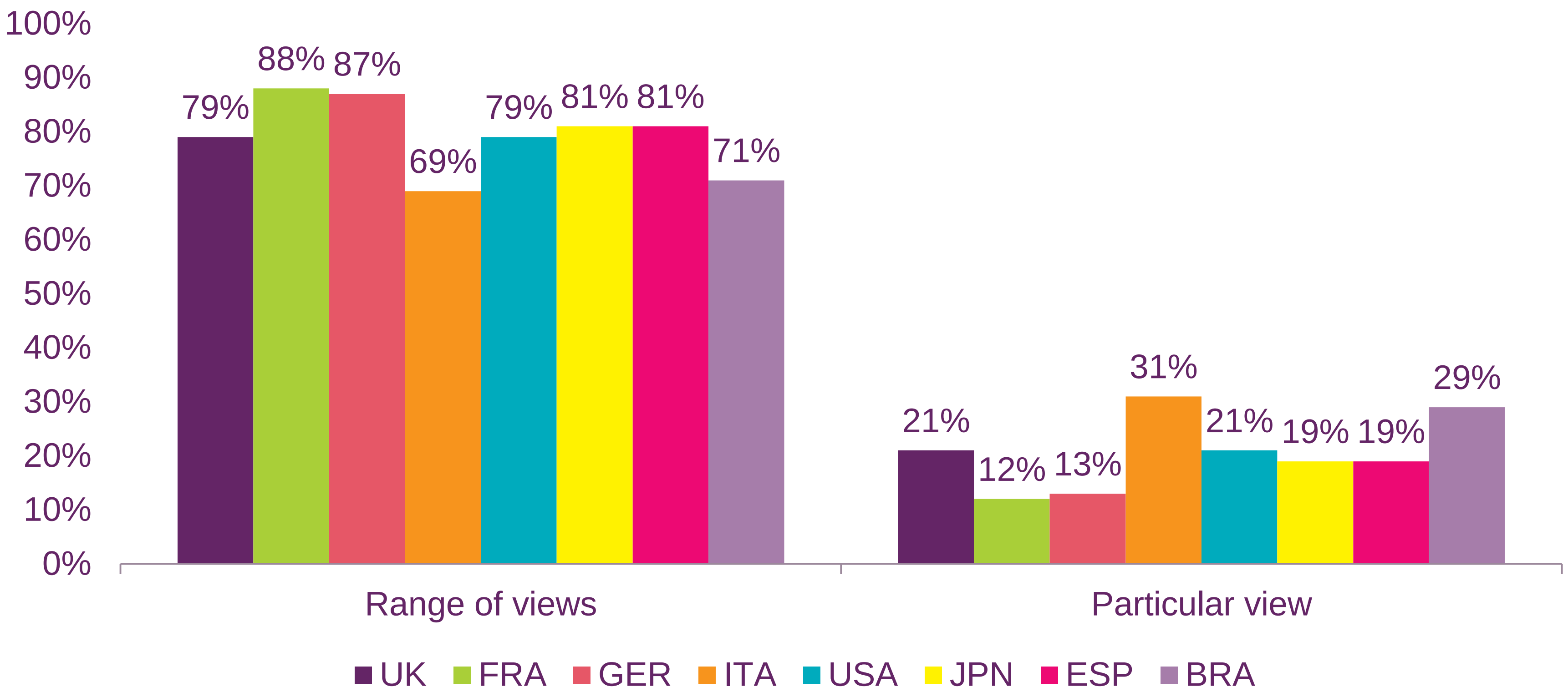
Figure 1.27

Preference for diverse news, by country



Source: Reuters Institute / YouGov research Jan/Feb 2014

Q5c: Thinking about different kinds of news available to you, do you prefer where the reporter tries to reflect…

Base: UK (n=2082) France (n=1946) Germany (n=2063) Italy (n=2010) US (n=2197) Japan (n=1973) Spain (n=2017) urban Brazil(1015)

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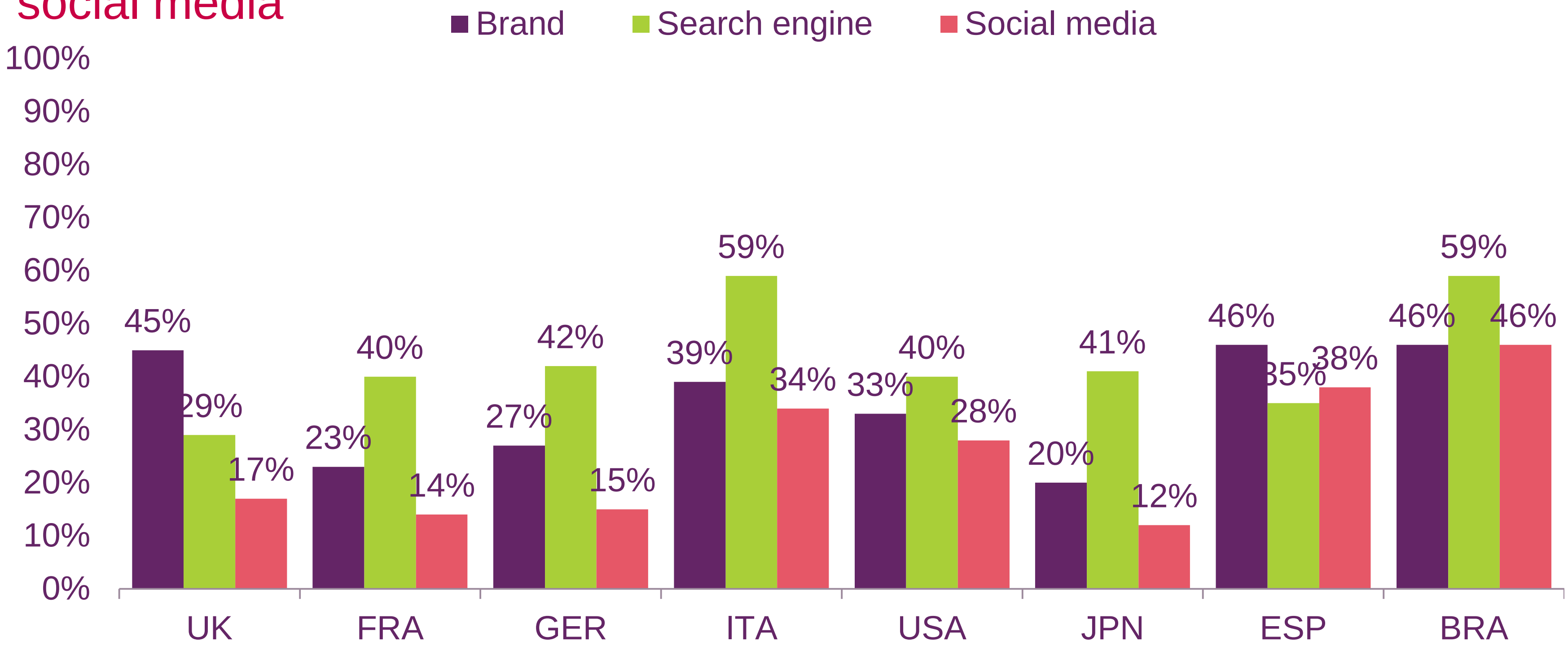
Figure 1.28

Comparison of online use of traditional brands, search engines and social media



Source: Reuters Institute / YouGov research Jan/Feb 2014
Q10: Which were the ways in which you came across news stories last week?
Base: UK (n=2082) France (n=1946) Germany (n=2063) Italy (n=2010) US (n=2197) Japan (n=1973) Spain (n=2017) urban Brazil(1015)
Note: respondents were asked about ways of accessing news additional to the subset discussed here

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Figure 1.29

Sharing, commenting and creating news, by country

	UK	FRA	GER	ITA	US	JPN	ESP	Urban BRA
Share a news via a social network	12%	11%	13%	35%	22%	8%	30%	42%
Rate or like a story	8%	10%	17%	31%	15%	6%	25%	22%
Comment on news website	7%	7%	8%	13%	14%	3%	7%	19%
Online vote	11%	11%	16%	24%	25%	4%	16%	22%
Talk to friends online	16%	15%	13%	19%	29%	7%	24%	33%
Talk with friends and colleagues	39%	30%	41%	40%	44%	14%	48%	44%

Source: Reuters Institute / YouGov research Jan/Feb 2014
Q13: During an average week in which, if any, of the following ways do you share or participate in news coverage? Multiple answers allowed, only some responses included here.
Base: UK (n=2082) France (n=1946) Germany (n=2063) Italy (n=2010) US (n=2197) Japan (n=1973) Spain (n=2017) urban Brazil(1015)

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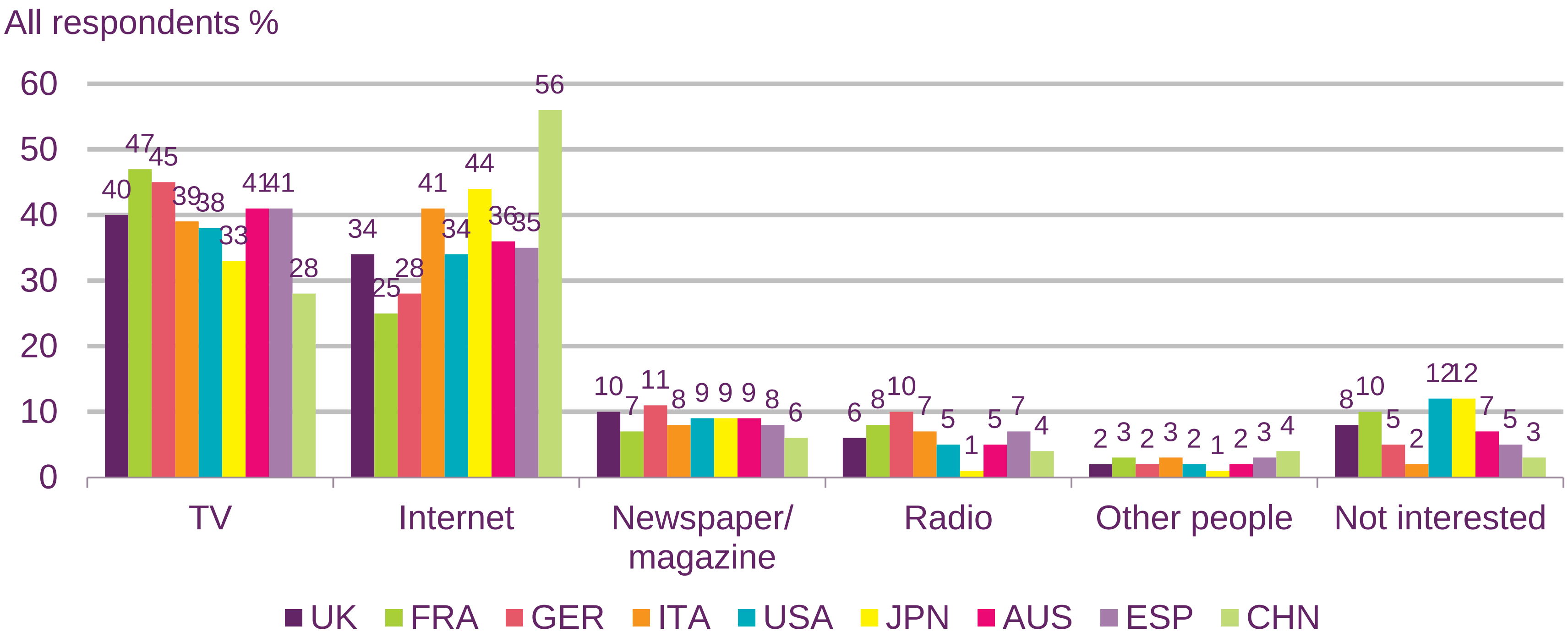
Figure 1.30

Main source of international news

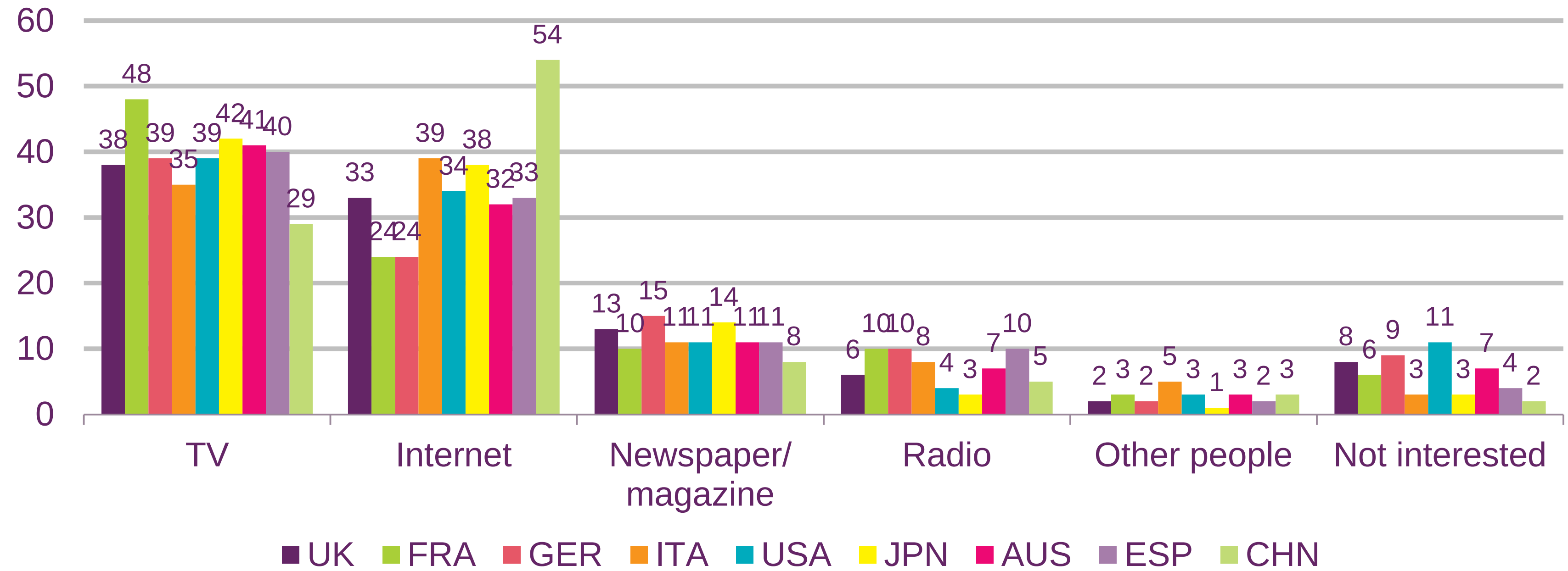


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q.11 Which, if any, is your main source for the following information? International News

Figure 1.31

Main source of national news

All respondents %

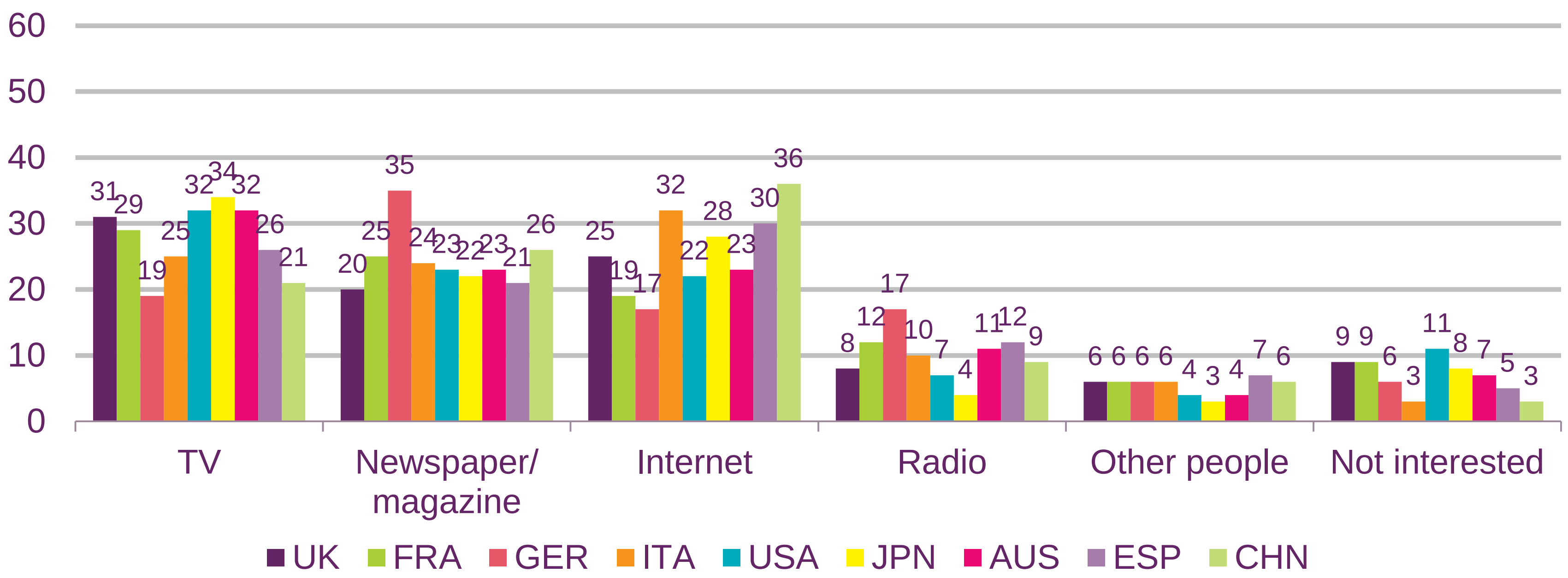


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q.11 Which, if any, is your main source for the following information? National News

Figure 1.32

Main source of regional/local news

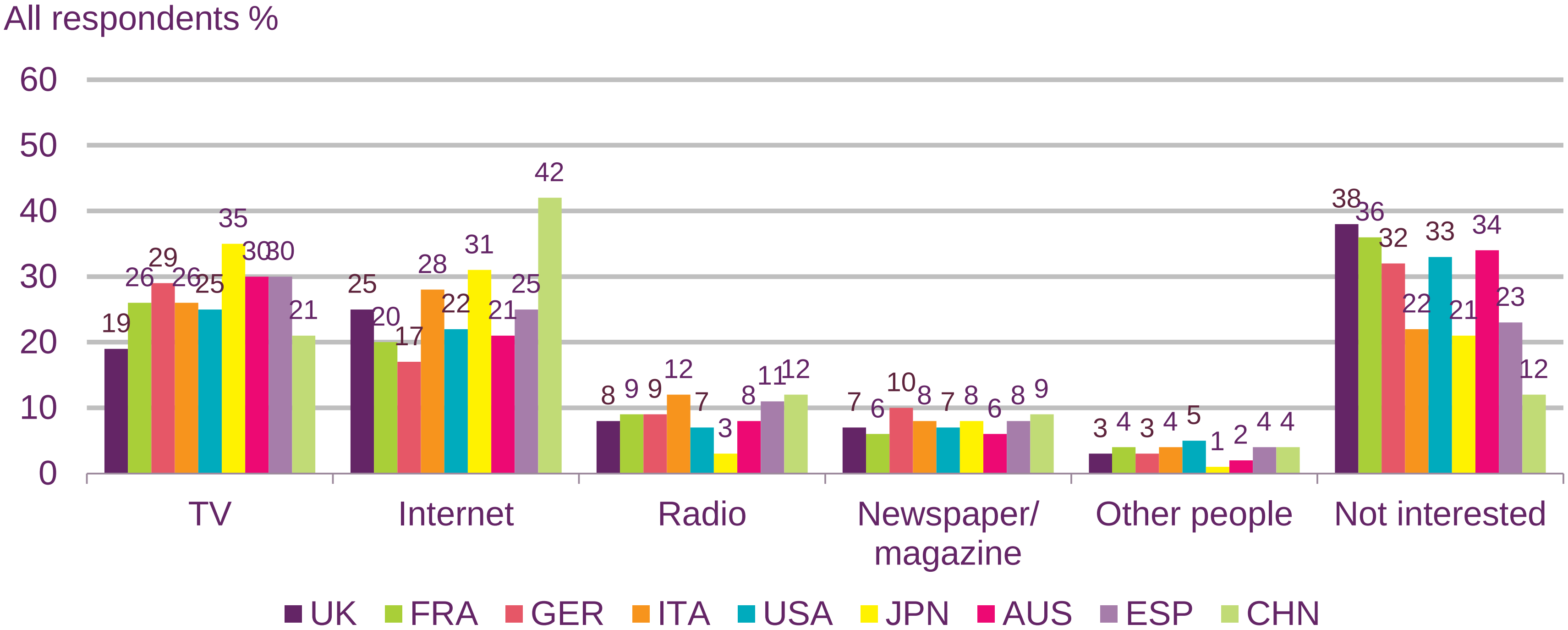
All respondents %



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.11 Which, if any, is your main source for the following information? Regional / local News

Figure 1.33

Main source of sports news

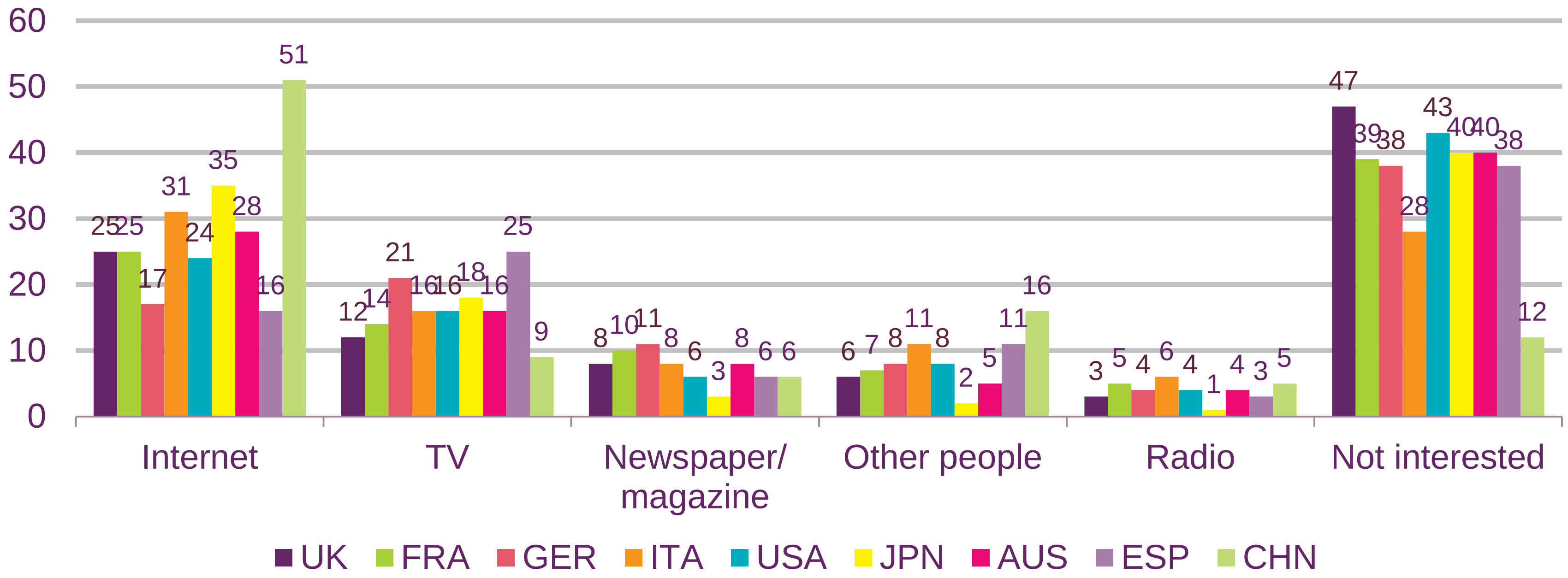


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q.11 Which, if any, is your main source for the following information? Regional / Sports news

Figure 1.34

Main source of celebrity news/gossip

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.11 Which, if any, is your main source for the following information? Celebrity news / gossip

Figure 1.35

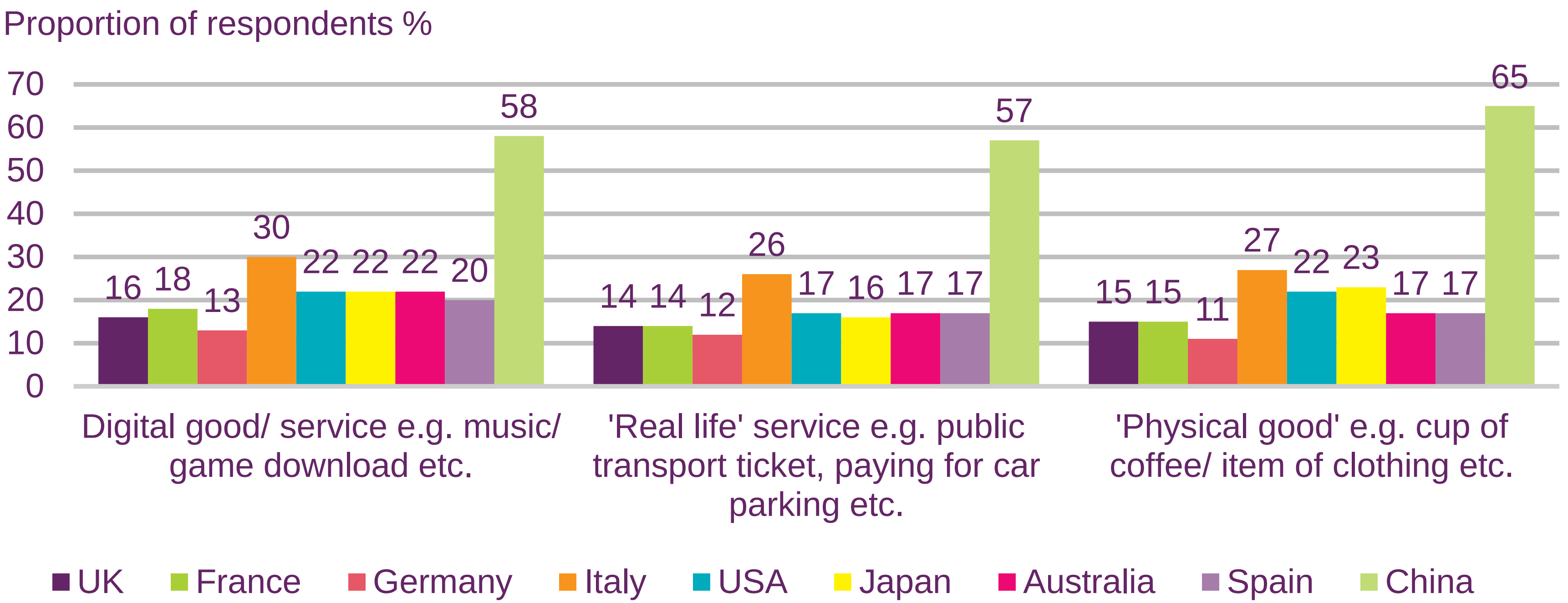
Examples of consumer-facing innovation in mobile payments

Type of mobile payment	Description	Selected examples
Banking apps	Apps to access bank accounts and perform banking functions	BBVA Espana (Spain), CommBank App (Australia)
Digital wallets	Service provides store of funds which can be used to make payments	mPesa (India), Zuum (Brazil), Vodafone Smartpass (UK, Germany, Netherlands, Spain), MTN Mobile Wallet (Nigeria), Google Wallet, PayPal
Integrated payments	Payments integrated into digital platforms	iTunes, Amazon (available in multiple comparator countries)
Mobile payment services	Access to interbank payment system via mobile handset	Paym (UK), Zapp (UK-2015), PSP (Poland), FAST (Singapore)
Operator billing	Goods and services charged to mobile bill	DCMX Mini (Japan), public transport ticketing (France, Sweden)
Payments-enabled handsets	Mobile handsets able to make contactless payments via NFC or authenticate payments via Bluetooth Low Energy	NFC handsets available in multiple countries. Some MNOs offer retrofit to non-NFC handsets e.g. SingTel NFC SIM Card (Singapore)

Source: Ofcom

Figure 1.36

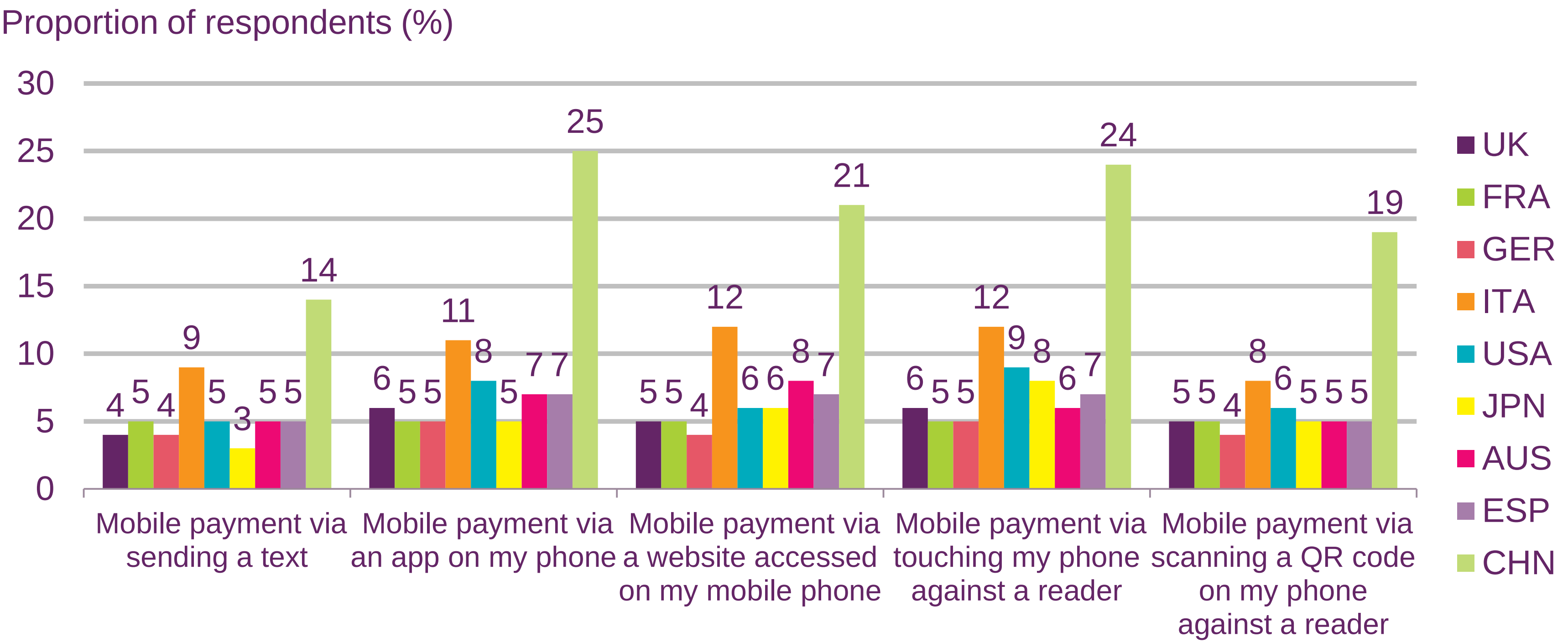
Proportion of respondents who have ever made a mobile payment, by type of goods purchased



Source: Ofcom consumer research. Q: Mobile payments' are purchases, bill payments, charitable donations, payments to another person, or any other payment. using a mobile phone. Which, if any, of the below methods of mobile payment have you ever personally used to buy each of these types of goods? Base: All respondents with a mobile phone/ smartphone. All respondents with a mobile phone/ smartphone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853

Figure 1.37

Type of mobile payment used for non-digital services

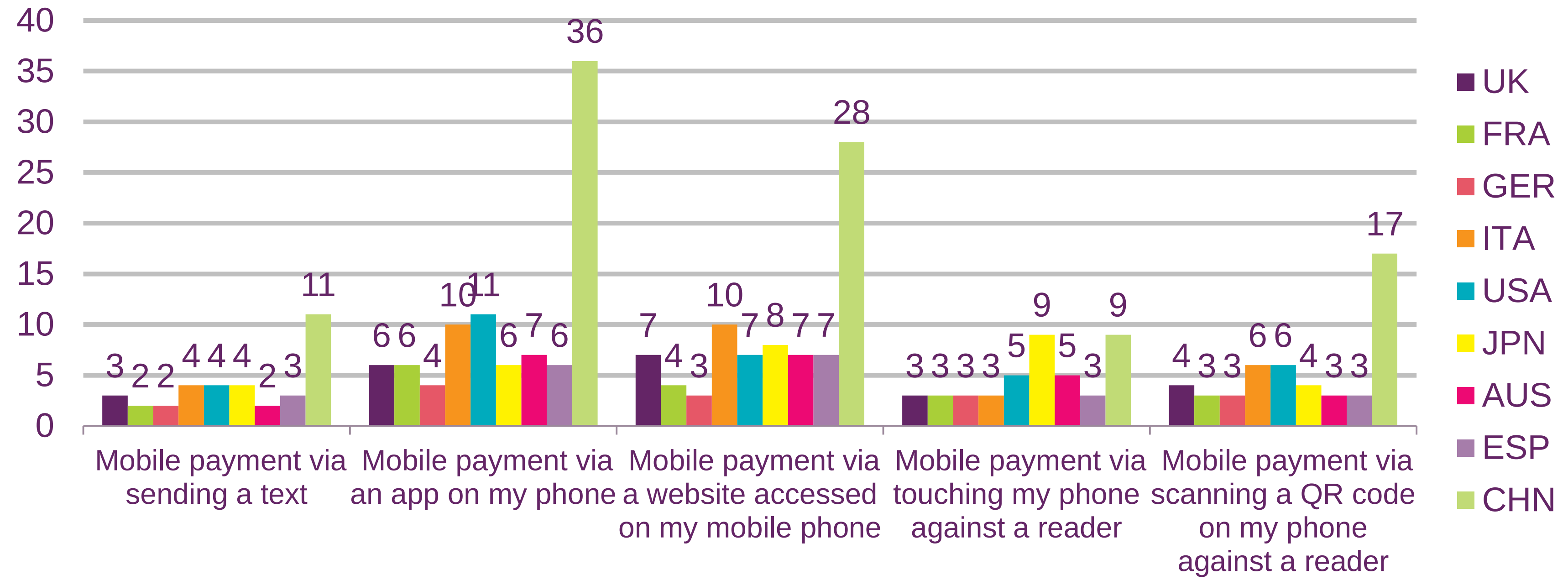


Source: Ofcom consumer research October 2014
Base: All respondents with a mobile phone/ smartphone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853
Q.32 mobile payments' are purchases, bill payments, charitable donations, payments to another person, or any other payment using a mobile phone. Which, if any, of the below methods of mobile payment have you ever personally used to buy each of these types of goods?

Figure 1.38

Type of mobile payment used for non-digital goods

Proportion of respondents (%)



Source: Ofcom consumer research October 2014

Base: All respondents with a mobile phone/ smartphone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853

Q.32 mobile payments' are purchases, bill payments, charitable donations, payments to another person, or any other payment using a mobile phone. Which, if any, of the below methods of mobile payment have you ever personally used to buy each of these types of goods?

Figure 1.39

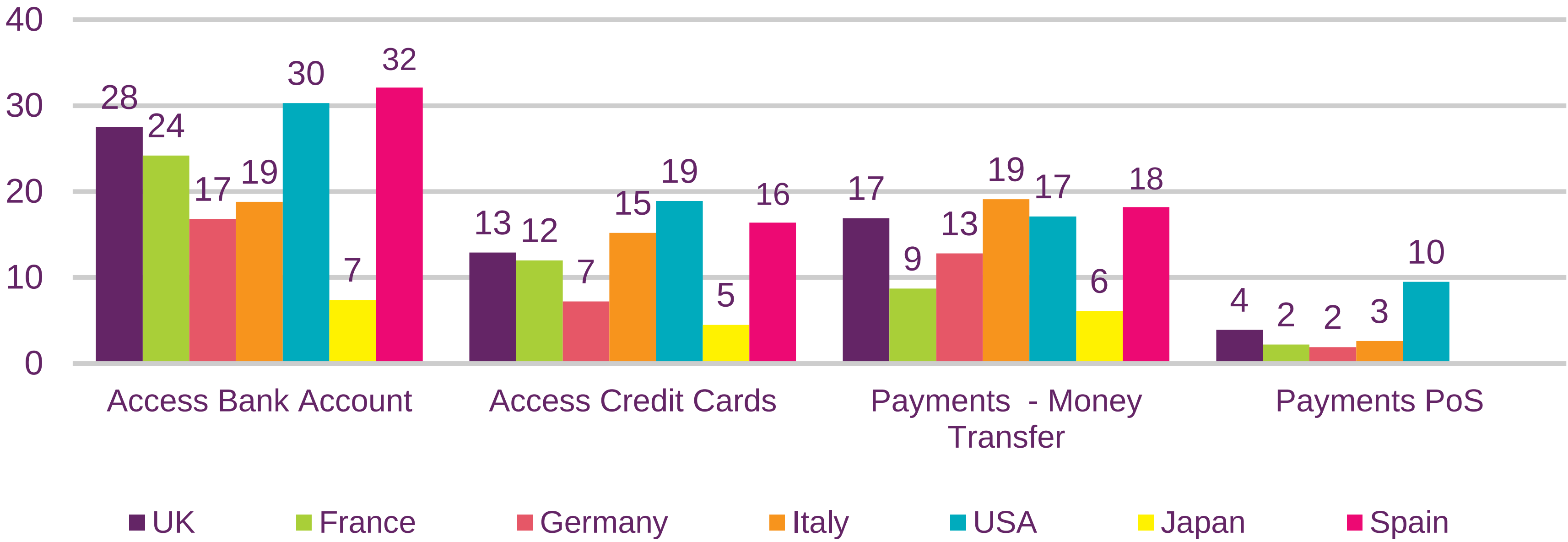
Main (prompted) reasons for never using mobile payments

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	CHN
It's easier to pay with cash or a credit/ debit card	44%	31%	42%	32%	38%	44%	42%	30%	28%
I'm concerned about the security of mobile payments	38%	36%	38%	28%	39%	22%	38%	39%	51%
I am concerned about privacy and control of my personal data	33%	26%	35%	20%	41%	18%	35%	31%	48%
I don't see any benefit from using mobile payments	35%	31%	37%	21%	36%	28%	34%	24%	6%
I don't trust the technology	29%	34%	32%	21%	30%	9%	27%	16%	21%
I don't have the necessary feature on my phone	28%	28%	25%	20%	34%	13%	27%	24%	13%

Source: Ofcom consumer research October 2014
Base: All respondents with a mobile phone/ smartphone who have never used mobile payments, UK=667, FRA=729, GER=729, ITA=560, USA=560, JPN=550, AUS=649, ESP=638, CHN=231
Q.33 Which, if any, of the below reasons explain why you have never used mobile payments?

Figure 1.40

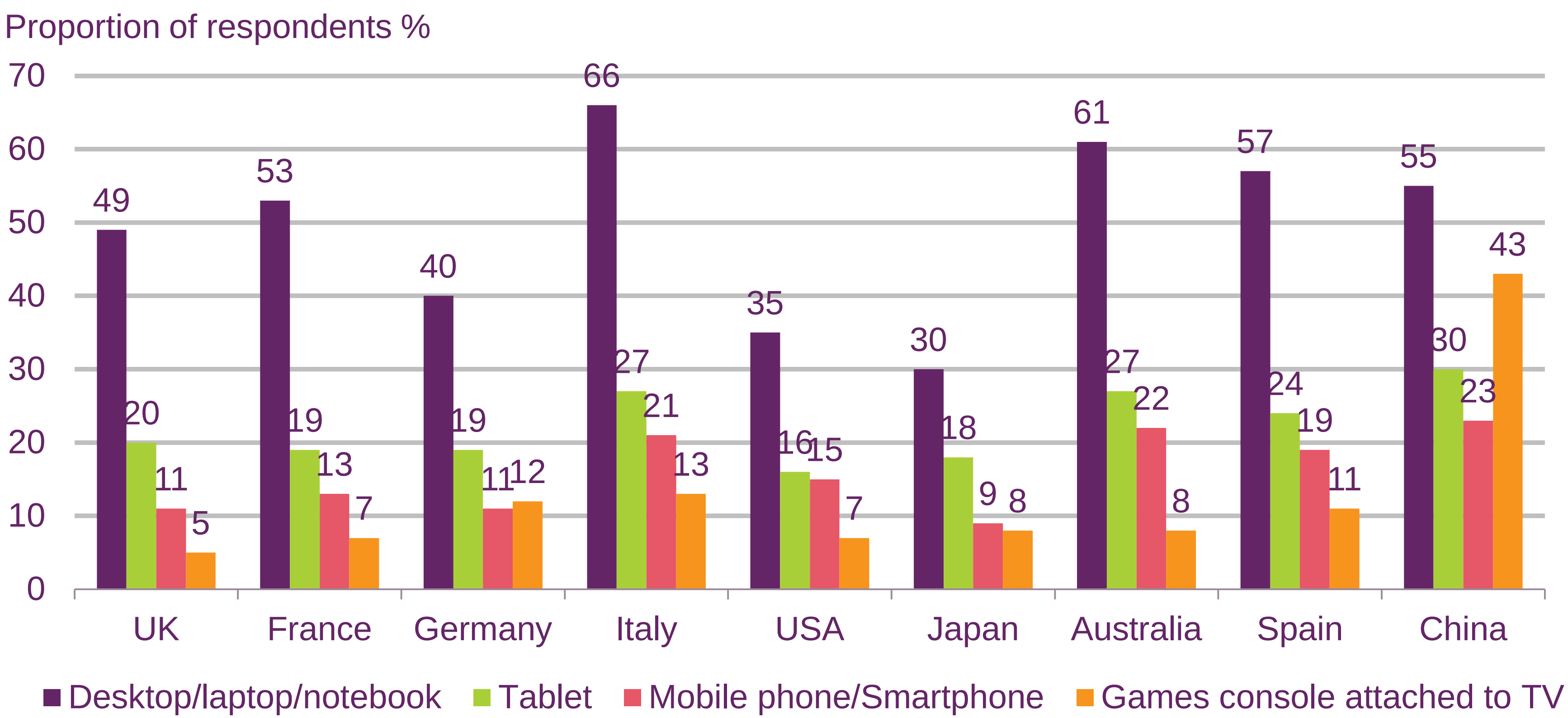
Use of mobile financial services in the past three months



Source: comScore Mobilens, August 2014 (three-month average). Filter: Respondents aged 13+ Note: point of sales (PoS) data is not available for Japan or Spain

Figure 1.41

Devices used to access local/national government websites



Source: Ofcom consumer research October 2014
Base: All respondents with each device, UK = 905, 540, 318, 99, France = 953, 469, 270, 63, Germany = 949, 469, 270, 63, Italy = 902, 762, 384, 97, USA = 907, 443, 274, 131, Japan = 934, 566, 209, 103, Australia= 944, 579, 325, 87, Spain = 903, 742, 394, 116, China = 947, 808, 446, 67
Q.9a Which, if any, of the following internet activities do you use each of your devices for?

International price benchmarking charts 2014

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Figure 2.1

Summary of households and baskets used in the analysis

'Typical household type'		Fixed voice	Mobile voice	Mobile messaging	Mobile handset data	Fixed line broadband	Mobile broadband	Television
1	A low use household with basic needs	Low use	Low use	None	None	None	None	Free-to-air
2	A broadband household with basic needs	Medium use	Low use	Low use	Low use	Low use	None	Free-to-air
3	A mobile 'power user'	None	High use	High use	High use	None	High use	Basic pay-TV with PVR
4	A family household with multiple needs	High use	Medium use	High use	Medium use	High use	None	Basic pay-TV with HD & PVR
5	An affluent two person household	Low use	High use	Medium use	Medium use	Medium use superfast	None	Premium pay-TV with HD & PVR

Source: Ofcom

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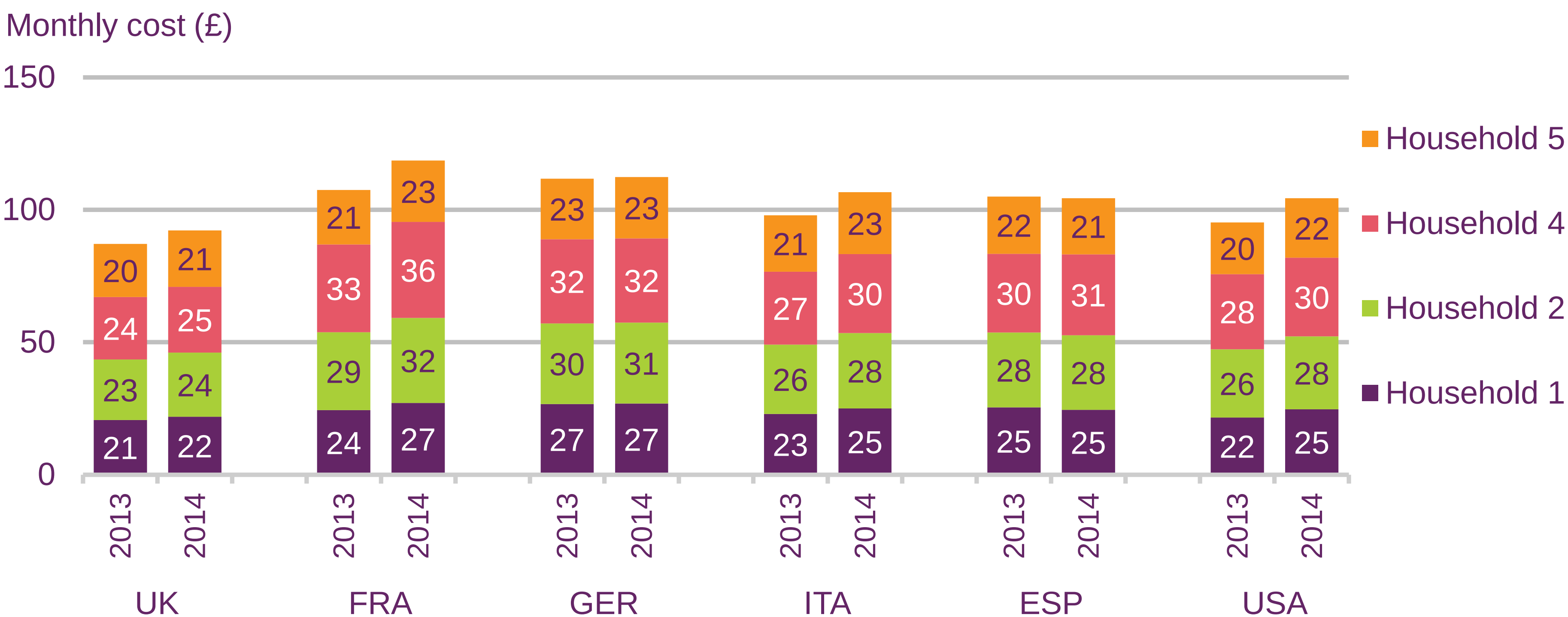
Figure 2.2

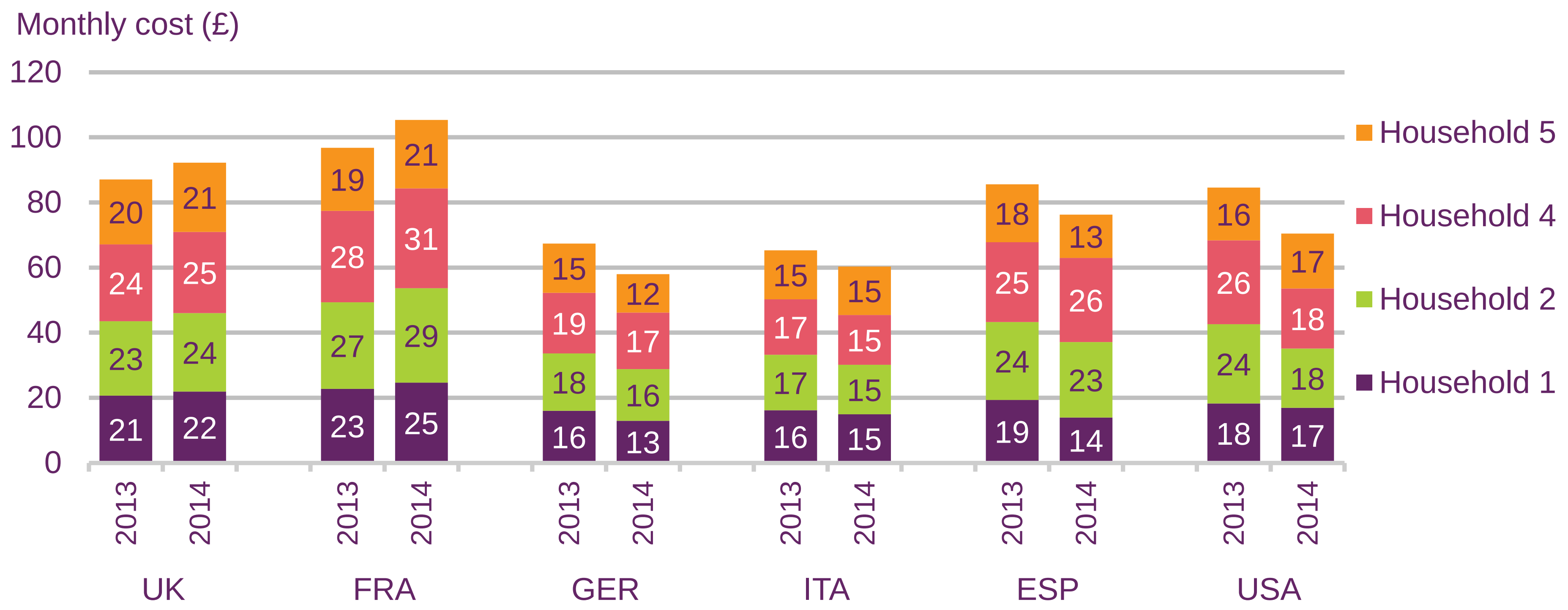
Comparative single service 'weighted average' fixed-line voice pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted

Figure 2.3

Comparative single service ‘lowest available’ fixed-line voice pricing



Source: Ofcom using data supplied by Teligen

Note: Lowest tariff available for the fixed-line voice component of each basket from any of the three largest operators by market share in each country, July 2013 and July 2014; PPP adjusted

Figure 2.4

Summary of mobile connection usage profiles

	Basket	Handset type	Outbound voice minutes per month	Outbound SMS per month	Data use per month
Connection 1	Household 1 handsets 1 and 2	Basic	50	None	None
Connection 2	Household 2 handsets 1 and 2	Basic	50	25	50MB
Connection 3	Household 4 handset 2	Intermediate	150	200	200MB
Connection 4	Household 5 handset 2	Intermediate	200	50	500MB
Connection 5	Household 4 handsets 3 and 4	Intermediate	100	250	1GB
Connection 6	Household 4 handset 1	Advanced	250	100	300MB
Connection 7	Household 5 handset 1	Advanced	300	150	1GB
Connection 8	Household 3 handset 1	Advanced	500	200	2GB

Source: Ofcom

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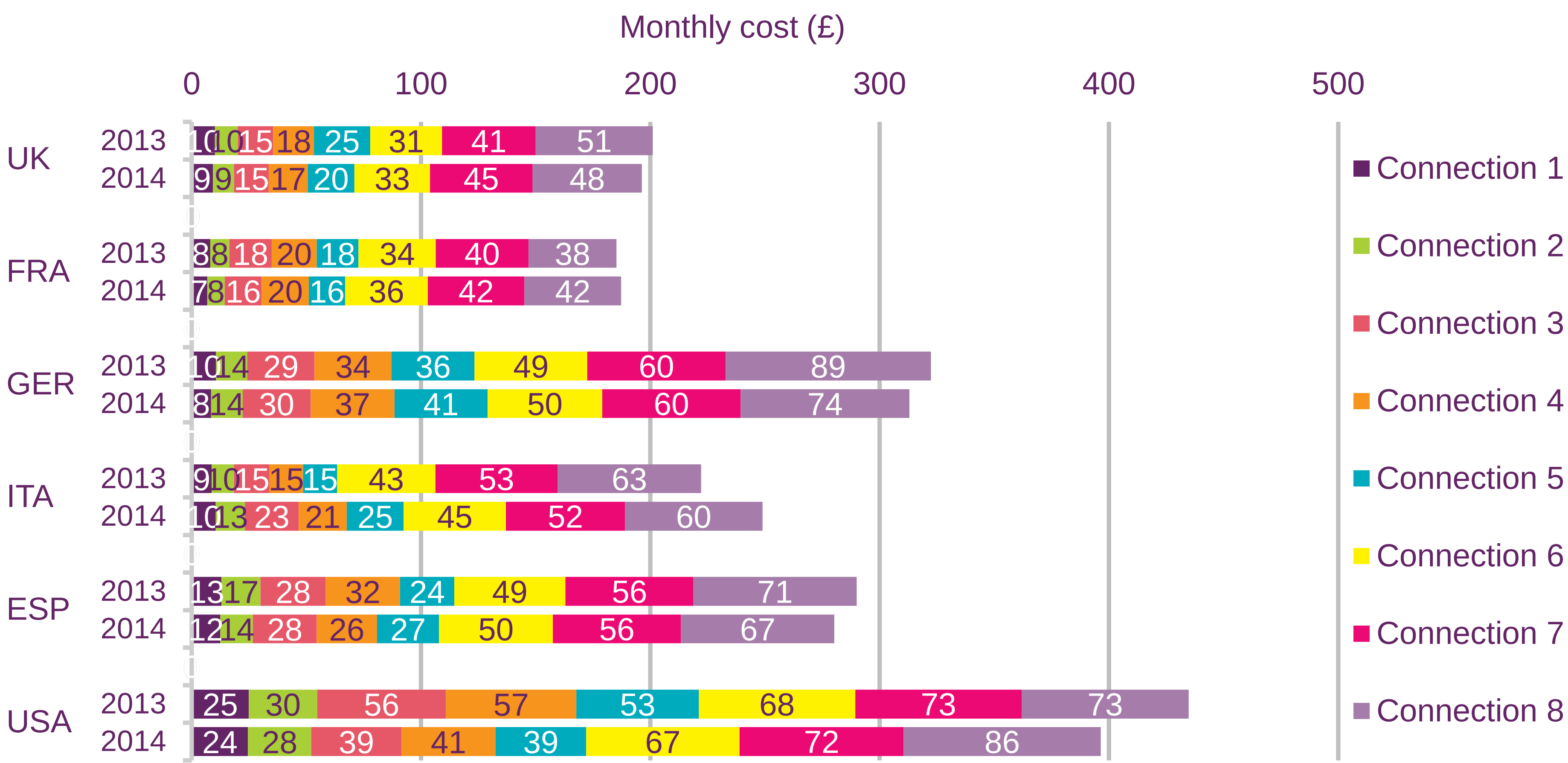
Figure 2.5

Comparative single service ‘weighted average’ mobile pricing

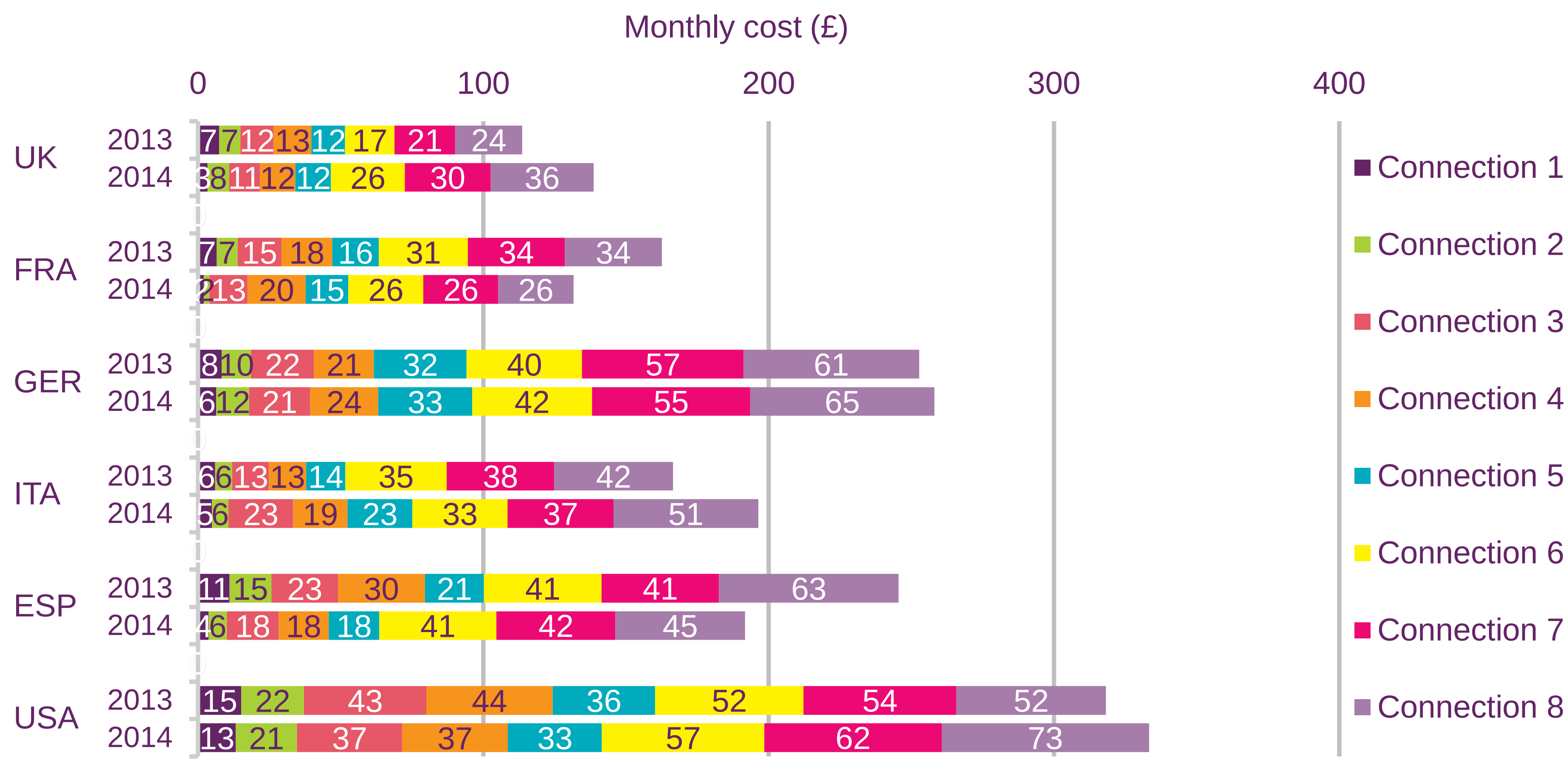


Source: Ofcom using data supplied by Teligen

Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted

Figure 2.6

Comparative single service 'lowest available' mobile pricing

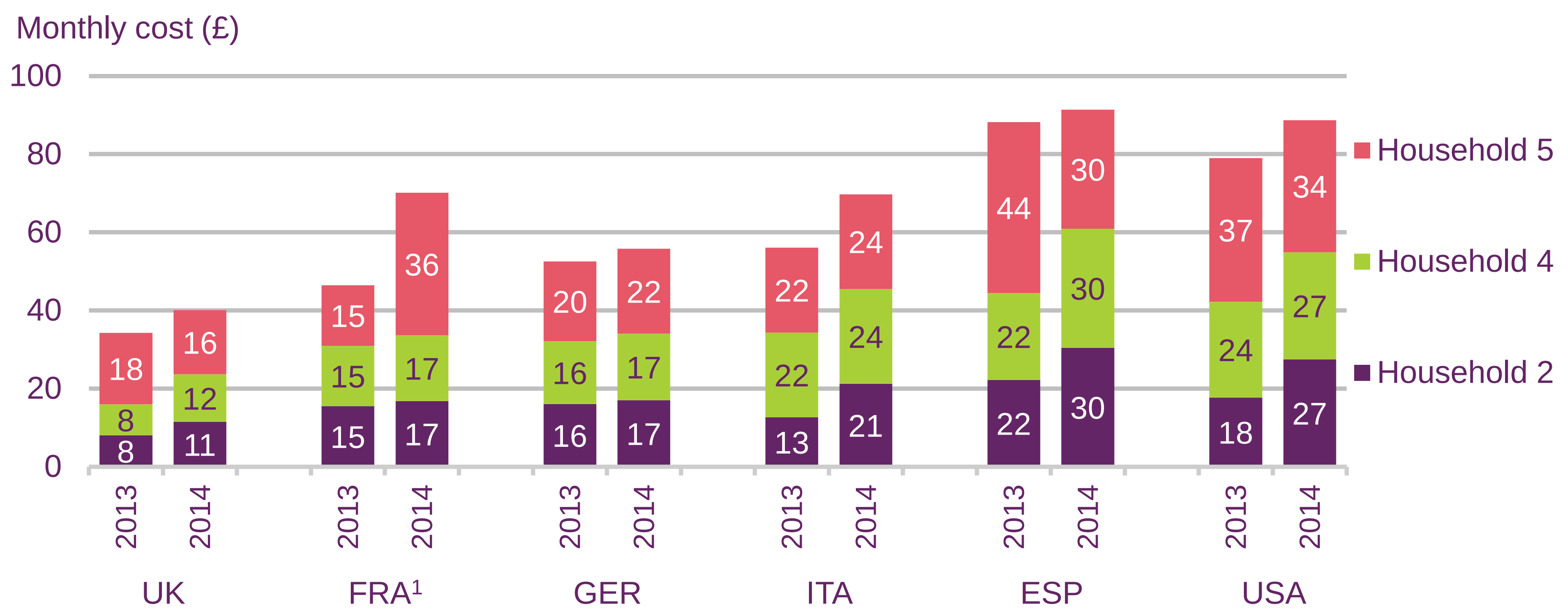


Source: Ofcom using data supplied by Teligen

Note: Lowest tariff available for the mobile phone component of each basket from any of the three largest operators by market share in each country, July 2013 and July 2014; PPP adjusted

Figure 2.7

Comparative stand-alone ‘lowest available’ fixed-line broadband pricing

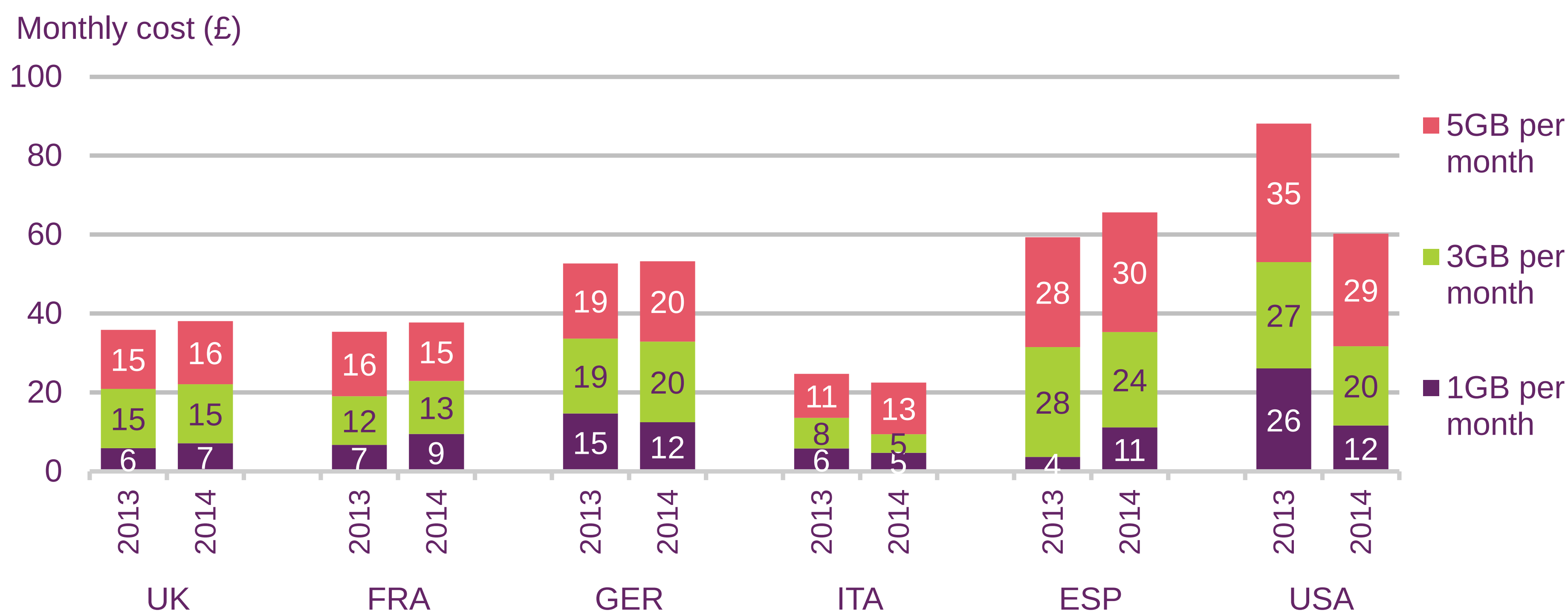


Source: Ofcom using data supplied by Teligen

Note: July 2013 and July 2014; PPP adjusted; [1] In France in 2013 Basket 5 includes a connection below 30Mbit/s because none of the ISPs included in our pricing model offered a suitable superfast service.

Figure 2.8

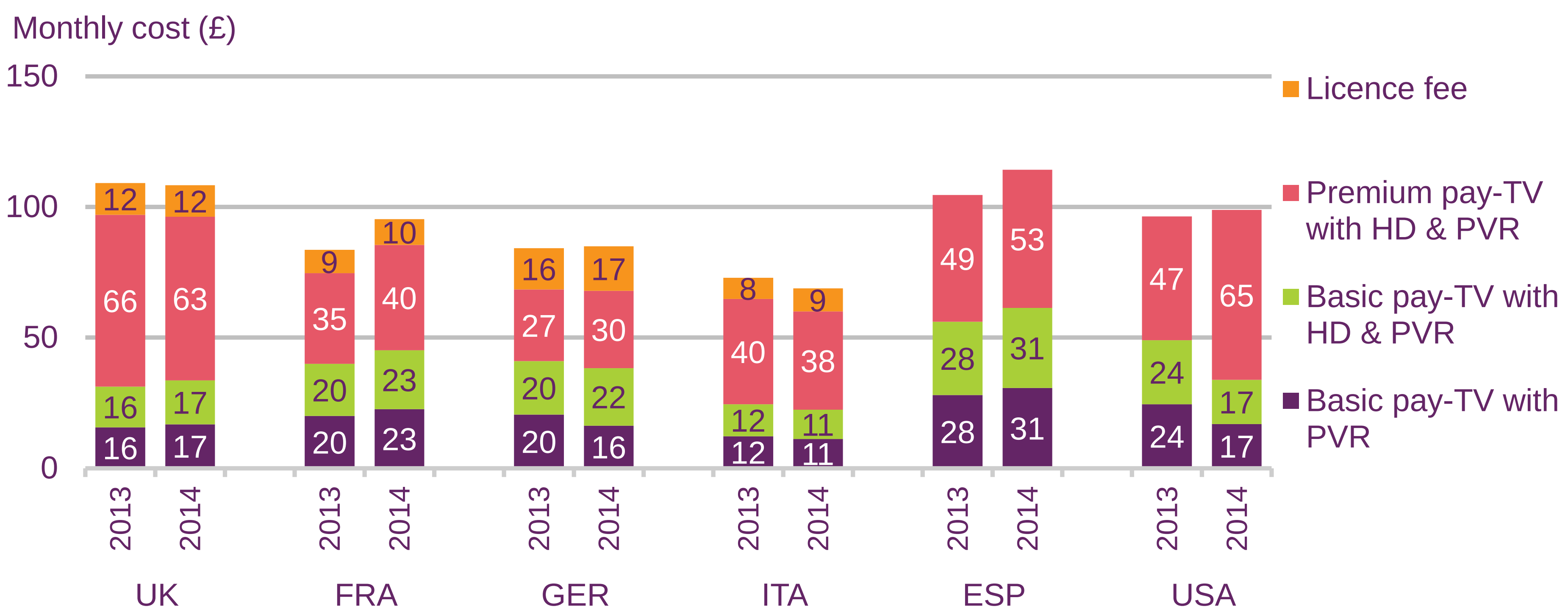
Comparative single service 'lowest available' mobile broadband pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted

Figure 2.9

Comparative stand-alone TV pricing



Source: Ofcom using data supplied by Teligen

Note: Basic pay-TV is defined as the minimum price required to purchase a pay-TV package which includes channels not available over free-to-air TV; premium TV is defined as the best package of top-league football (NFL in the US and a top price film/entertainment package); lowest tariff available for the pay-TV component of each basket from any of the three largest operators by market share in each country, July 2013 and July 2014; PPP adjusted

Figure 2.10

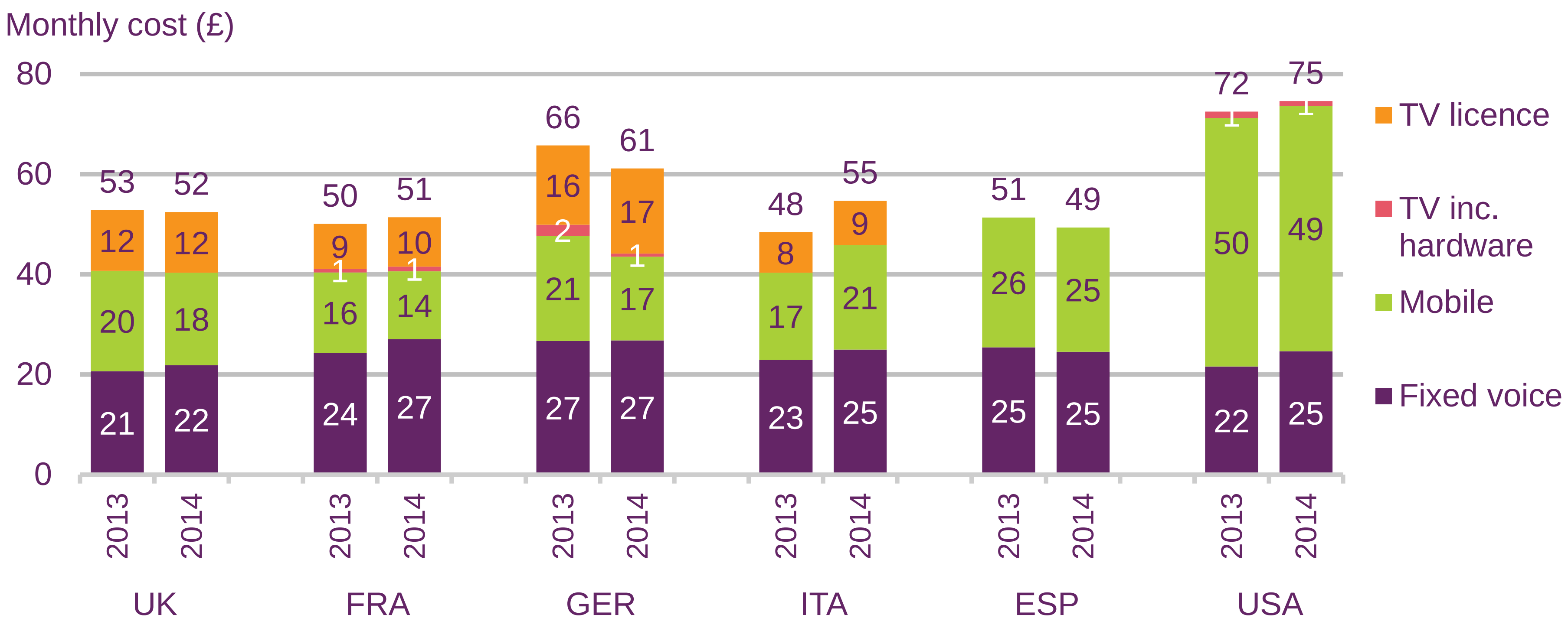
Composition of Basket 1

Fixed-line voice	Fixed broadband	Mobile	Mobile broadband	Television
300 call minutes	None	**Connection 1** 50 call minutes **Connection 2** 50 call minutes	None	Free-to-air

Source: Ofcom

Figure 2.11

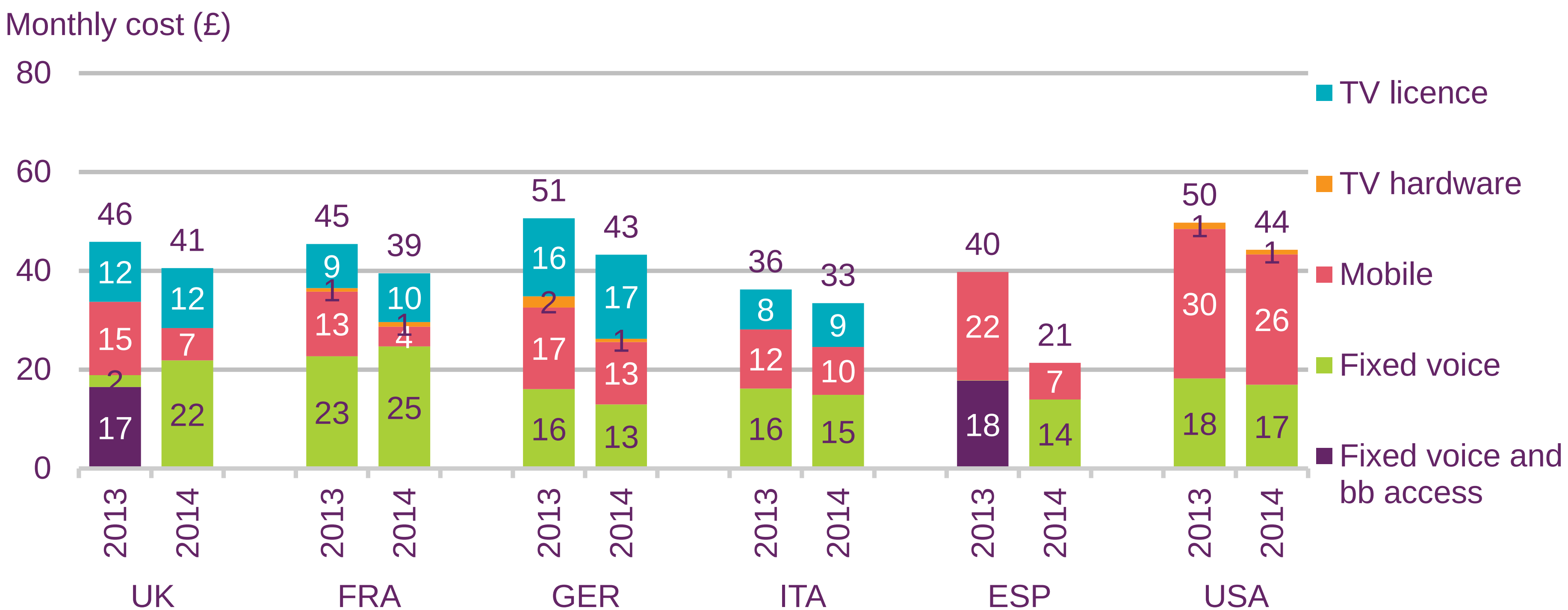
Basket 1: ‘weighted average’ stand-alone pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted

Figure 2.12

Basket 1: comparative 'lowest available' pricing



Source: Ofcom using data supplied by Teligen

Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, July 2013 and July 2014; PPP adjusted; where a service is included in a bundle any additional usage charges are recorded separately against the relevant service

Figure 2.13

Composition of Basket 2

Fixed-line voice	Fixed broadband	Mobile	Mobile broadband	Television
400 call minutes	Minimum 4Mbit/s headline speed 20GB data	**Connection 1** 50 call minutes 25 SMS 50MB data **Connection 2** 50 call minutes 25 SMS 50MB data	None	Free-to-air

Source: Ofcom

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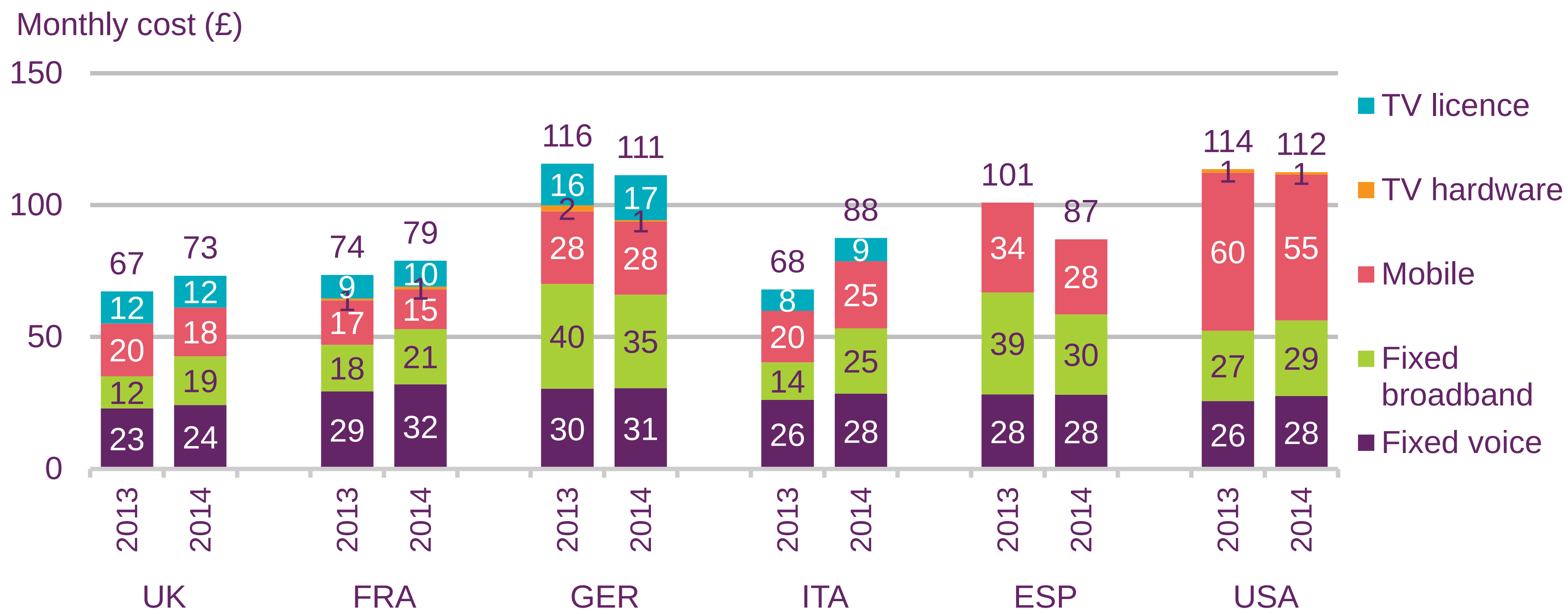
Figure 2.14

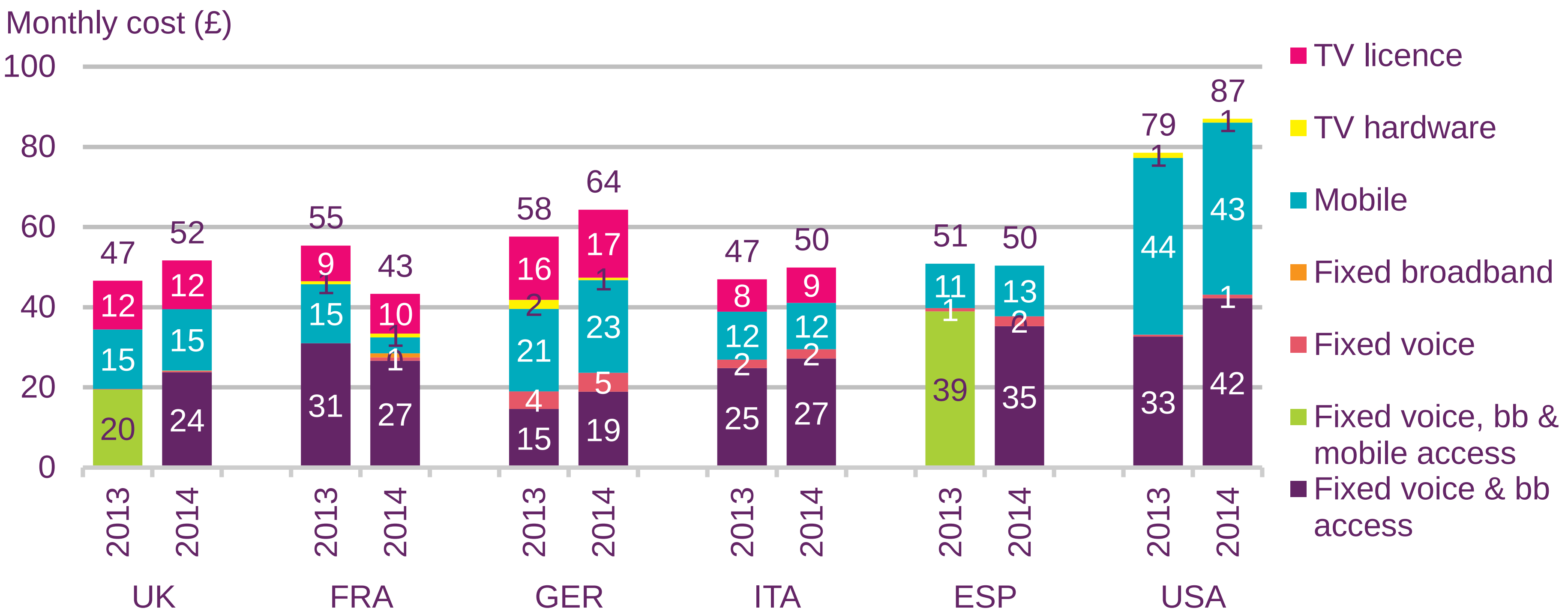
Basket 2: ‘weighted average’ stand-alone pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted

Figure 2.15

Basket 2: comparative ‘lowest available’ pricing



Ofcom using data supplied by Teligen

Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, July 2013 and July 2014; PPP adjusted; where a service is included in a bundle any additional usage charges are recorded separately against the relevant service.

Figure 2.16

Composition of Basket 3

Fixed-line voice	Fixed broadband	Mobile	Mobile broadband	Television
None	None	500 call minutes 200 SMS 2GB data	5GB over 30 days per month	Basic pay-TV DVR

Source: Ofcom

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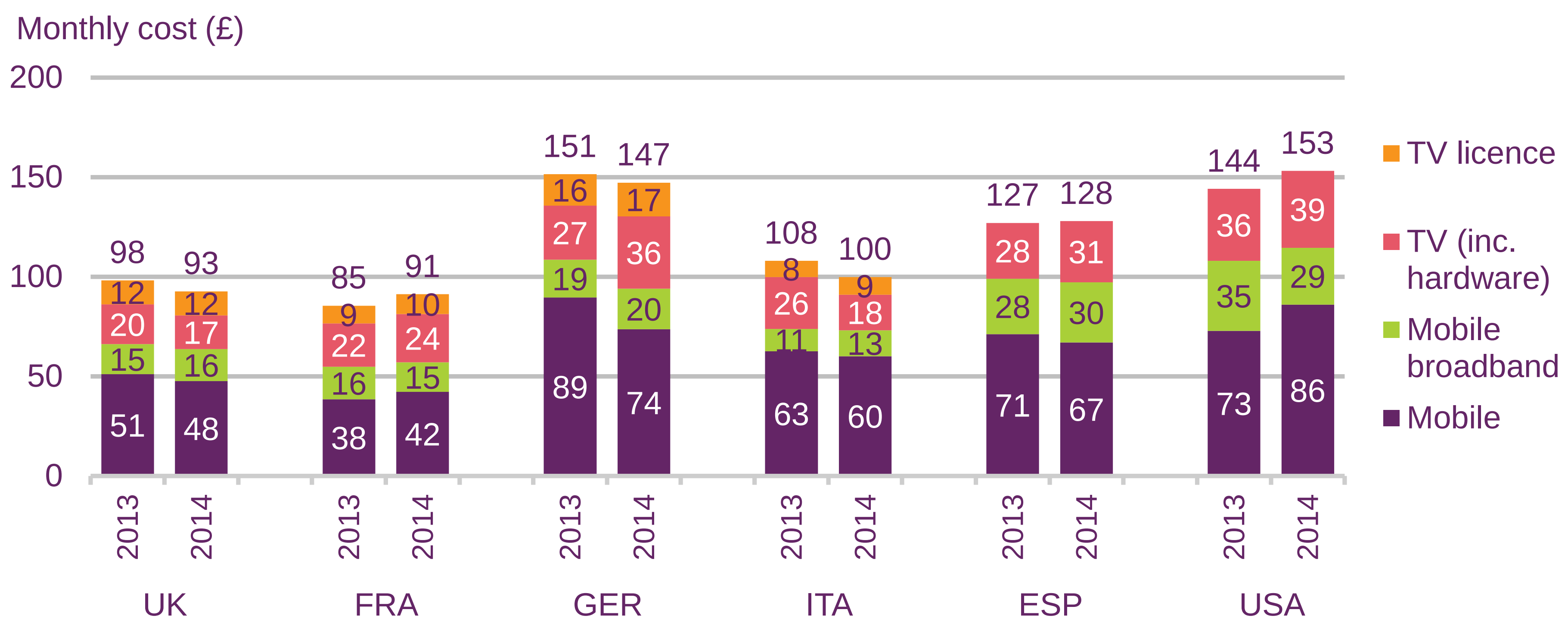
Figure 2.17

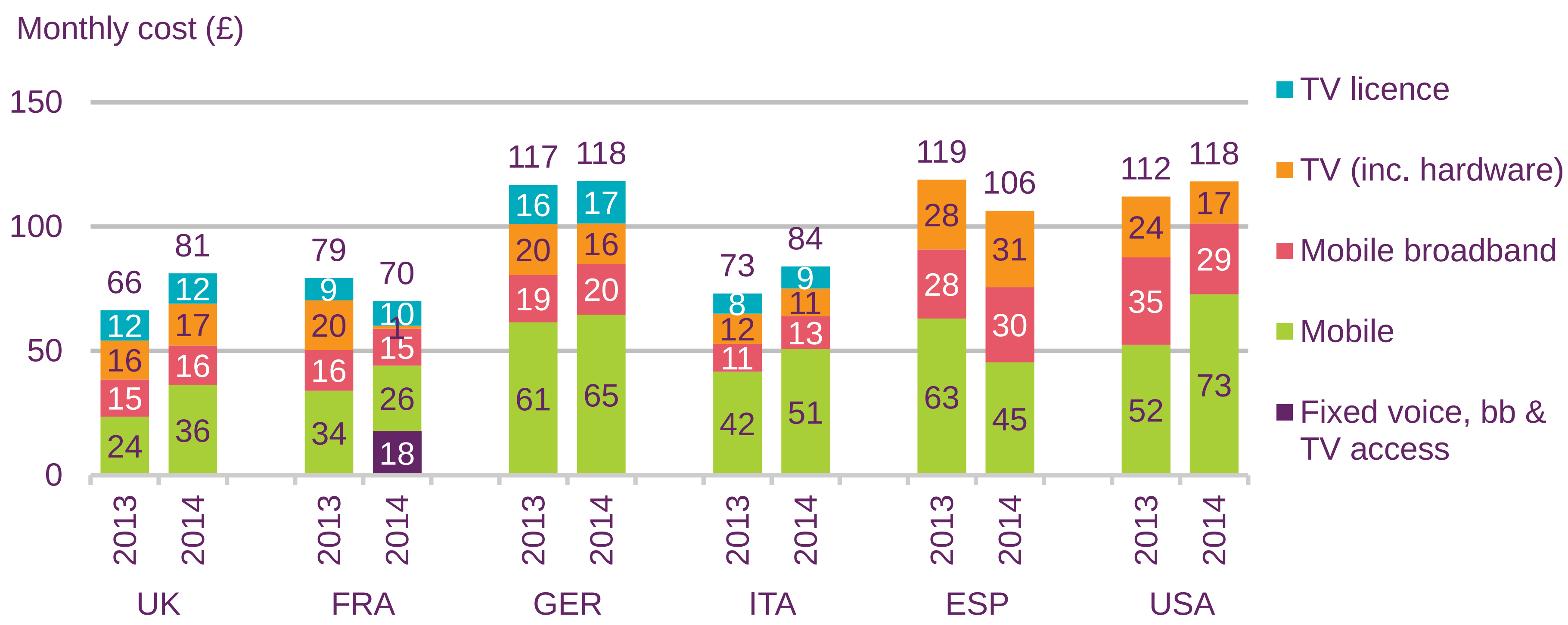
Basket 3: ‘weighted average’ stand-alone pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted; the figure for mobile broadband is the lowest available stand-alone cost.

Figure 2.18

Basket 3: comparative 'lowest available' pricing



Source: Ofcom using data supplied by Teligen
Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, July 2013 and July 2014; PPP adjusted.

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Figure 2.19

Composition of Basket 4

Fixed-line voice	Fixed broadband	Mobile	Mobile broadband	Television
500 call minutes	Minimum 10Mbit/s headline speed 60GB data	**Connection 1** 250 call minutes 100 SMS 300MB data **Connection 2** 150 call minutes 200 SMS 200MB data **Connection 3** 100 call minutes 250 SMS 1GB data **Connection 4** 100 call minutes 250 SMS 1GB data	None	HD basic pay-TV DVR

Source: Ofcom

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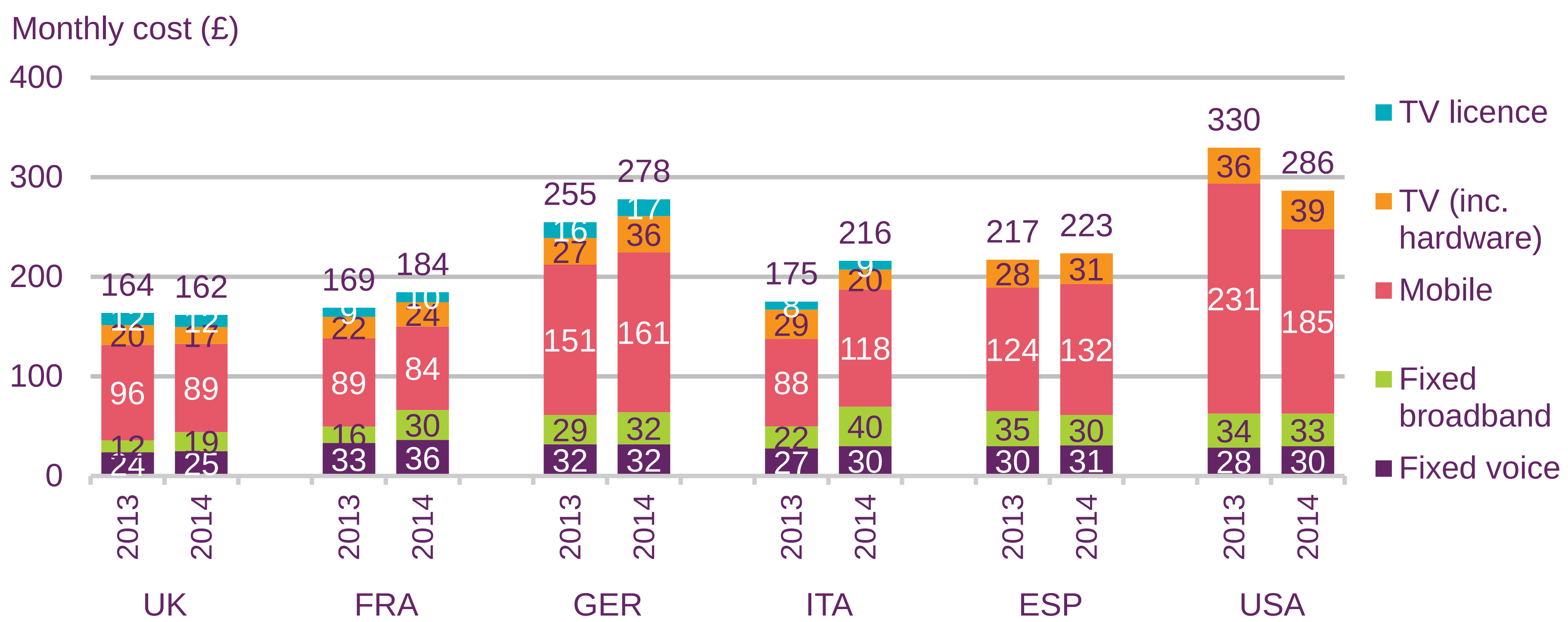
Figure 2.20

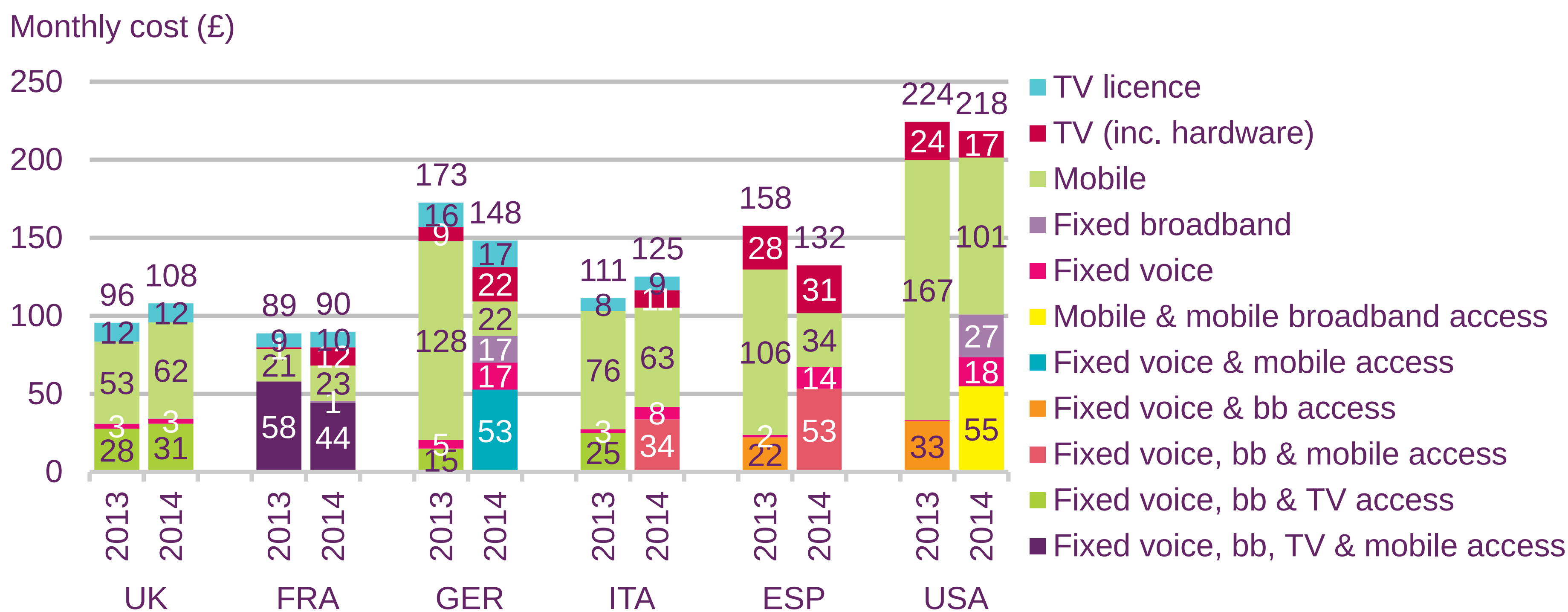
Basket 4: ‘weighted average’ stand-alone pricing



Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted.

Figure 2.21

Basket 4: comparative 'lowest available' pricing including multi-play tariffs



Source: Ofcom using data supplied by Teligen

Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, July 2013 and July 2014; PPP adjusted; where a service is included in a bundle any additional usage charges are recorded separately against the relevant service.

Figure 2.22

Composition of Basket 5

Fixed-line voice	Fixed broadband	Mobile	Mobile broadband	Television
200 call minutes	Minimum 30Mbit/s headline speed 90GB data	**Connection 1** 300 call minutes 150 SMS 1GB data **Connection 2** 200 call minutes 50 SMS 500MB data	None	HD pay-TV with sports and movies PVR

Source: Ofcom

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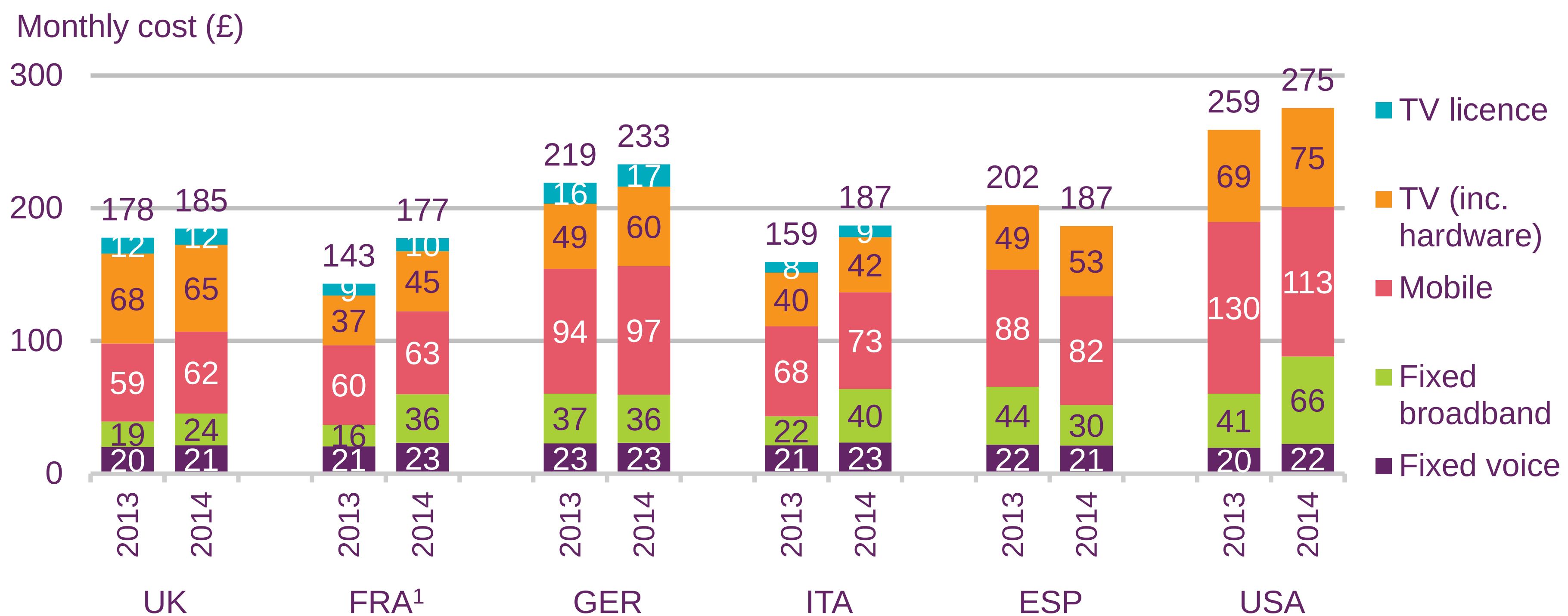
Figure 2.23

Basket 5: ‘weighted average’ stand-alone pricing



	UK 2013	UK 2014	FRA 2013	FRA 2014	GER 2013	GER 2014	ITA 2013	ITA 2014	ESP 2013	ESP 2014	USA 2013	USA 2014
TV licence	12	12	9	10	16	17	8	9				
TV (inc. hardware)	68	65	37	45	49	60	40	42	49	53	69	75
Mobile	59	62	60	63	94	97	68	73	88	82	130	113
Fixed broadband	19	24	16	36	37	36	22	40	44	30	41	66
Fixed voice	20	21	21	23	23	23	21	23	22	21	20	22
Total	178	185	143	177	219	233	159	187	202	187	259	275

Source: Ofcom using data supplied by Teligen
Note: Weighted average of best-value tariff from each of the three largest operators by market share in each country; July 2013 and July 2014; PPP adjusted; the figure for mobile broadband is the lowest available stand-alone cost; 1 In France in 2013 Household 5 includes a connection below 30Mbit/s because none of the ISPs included in our pricing model offered a suitable ‘up to’ 30Mbit/s or higher service.

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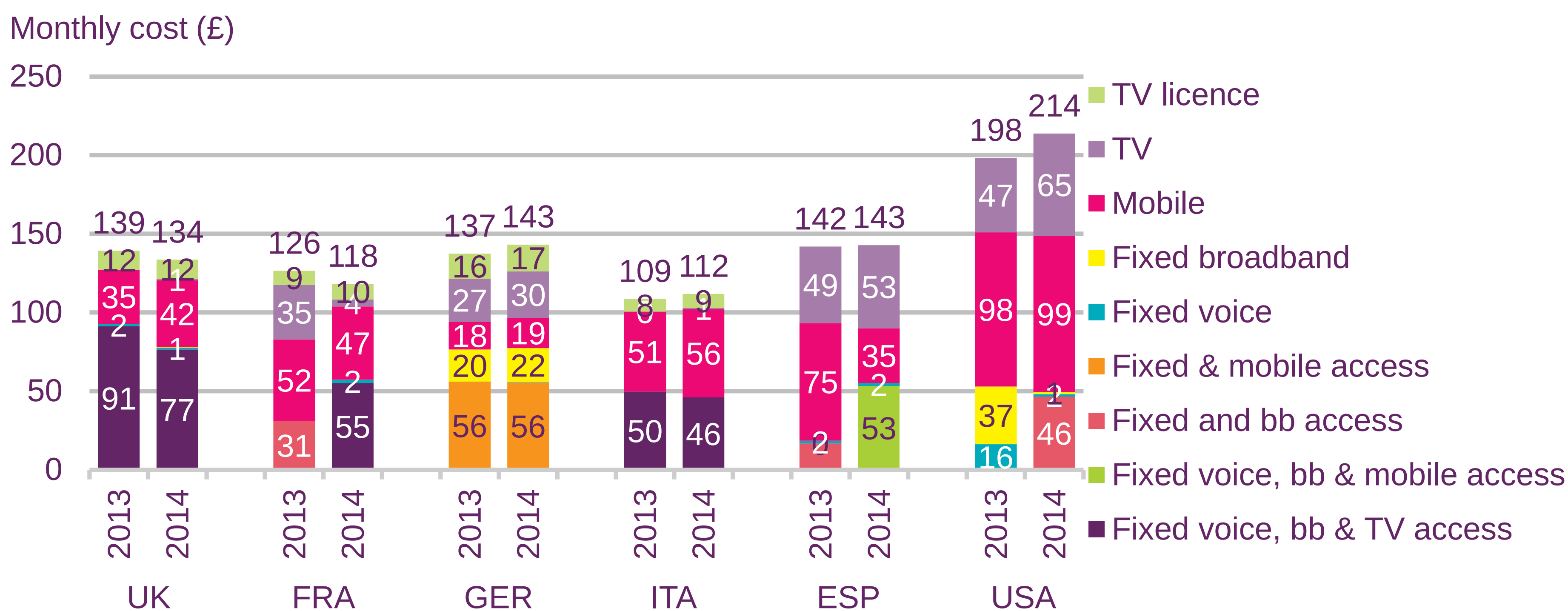
Figure 2.24

Basket 5: comparative 'lowest available' pricing, including multi-play tariffs



Source: Ofcom using data supplied by Teligen
Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, July 2013 and July 2014; PPP adjusted; where a service is included in a bundle any additional usage charges are recorded separately against the relevant service.

Figure 2.25 Summary of 'weighted average' and 'lowest available' basket pricing

'Weighted average' stand-alone service pricing (£ per month)

Basket	Rank		Country	Price	Change
Basket 1	1	↑	UK	40	0
	2	↑	FRA	42	0
	3	↑	GER	44	-6
	4	↓	ITA	46	6
	5	-	ESP	49	-2
	6	-	USA	75	2
Basket 2	1	-	UK	61	6
	2	↑	FRA	69	4
	3	↑	ITA	79	19
	4	↑	ESP	87	-14
	5	↓	GER	94	-6
	6	-	USA	112	-1
Basket 3	1	↑	UK	81	-6
	2	↓	FRA	81	5
	3	-	ITA	91	-9
	4	-	ESP	128	1
	5	-	GER	130	-5
	6	-	USA	153	9
Basket 4	1	-	UK	150	-2
	2	-	FRA	174	15
	3	-	ITA	207	40
	4	-	ESP	223	6
	5	-	GER	261	22
	6	-	USA	286	-43
Basket 5	1	-	FRA	168	33
	2	↑	UK	172	7
	3	↓	ITA	178	27
	4	-	ESP	187	-16
	5	-	GER	216	13
	6	-	USA	275	16

'Lowest available' pricing, including bundles (£ per month)

Basket	Rank		Country	Price	Change
Basket 1	1	↑	ESP	21	-18
	2	↓	ITA	25	-4
	3	-	GER	26	-9
	4	↓	UK	28	-5
	5	↓	FRA	30	-7
	6	-	USA	44	-6
Basket 2	1	↑	FRA	33	-13
	2	↓	UK	40	5
	3	↓	ITA	41	2
	4	↓	GER	47	6
	5	-	ESP	50	0
	6	-	USA	87	8
Basket 3	1	↑	FRA	60	-10
	2	↓	UK	69	15
	3	↓	ITA	75	10
	4	-	GER	101	0
	5	↑	ESP	106	-12
	6	↓	USA	118	6
Basket 4	1	-	FRA	80	0
	2	-	UK	96	12
	3	-	ITA	116	13
	4	-	GER	131	-25
	5	-	ESP	132	-25
	6	-	USA	218	-6
Basket 5	1	-	ITA	103	2
	2	-	FRA	108	-9
	3	↑	UK	121	-6
	4	↓	GER	126	5
	5	-	ESP	143	1
	6	-	USA	214	15

Source: Ofcom using data supplied by Teligen
Note: Excludes the TV licence fee

Figure 2.26

Average price rankings across all households

'Weighted average' stand-alone pricing		
1	-	UK
2	-	FRA
3	-	ITA
4	-	ESP
5	-	GER
6	-	USA

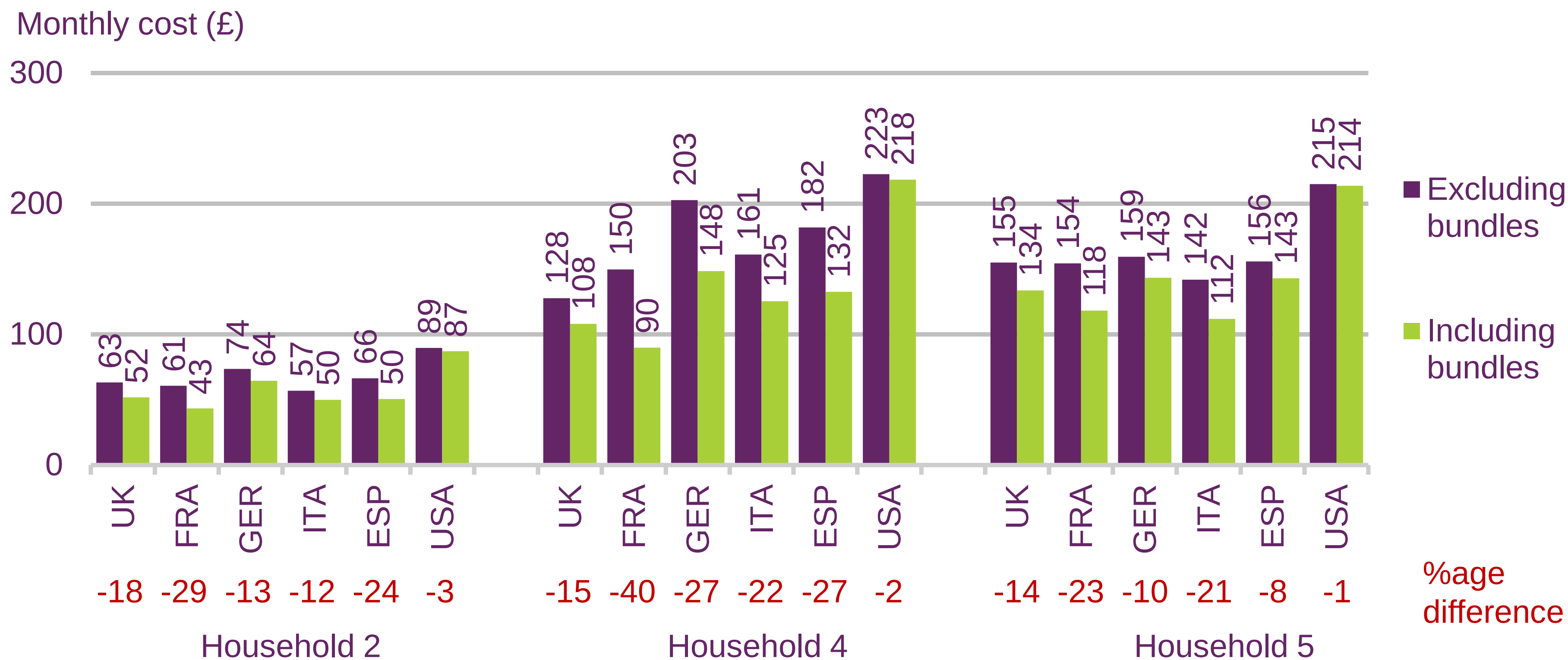
'Lowest available' pricing including bundles		
1	↑	FRA
2	↓	ITA
3	↓	UK
4	-	GER
5	-	ESP
6	-	USA

'Weighted average' stand-alone & 'lowest available' including bundles pricing		
1=	-	UK
1=	↑	FRA
3	↓	ITA
4=	-	GER
4=	↑	ESP
6	-	USA

Source: Ofcom using data supplied by Teligen
Note: Excludes the TV licence fee

Figure 2.27

Difference between 'lowest available' prices including and excluding bundles



Source: Ofcom using data supplied by Teligen
Note: Lowest tariff available for each service type from any of the largest operators by market share in each country, PPP adjusted; where a service is included in a bundle any additional usage charges are recorded separately against the relevant service.

3. Television and audio-visual

Figure 3.1

TV industry metrics 2013

		UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
TV revenue (£bn)		13.4	8.8	18.9	6.7	110.2	20.6	4.6	3.0	2.6	1.9	2.2	0.6	5.2	12.1	4.3	5.0	20.6	0.5
Revs change (% YOY)		3.4%	0.4%	2.5%	-4.5%	2.0%	2.3%	3.4%	-6.2%	1.5%	2.0%	-1.3%	3.5%	5.8%	15.8%	13.6%	15.0%	16.6%	19.5%
Revenue per cap (£)		210	134	230	109	348	162	199	63	158	202	57	110	106	61	30	4	15	3
from advertising		92	57	66	41	193	56	60	28	82	97	38	44	67	33	8	2	7	2
from subscription		59	35	105	25	0	32	33	5	29	43	1	0	7	0	0	0	0	0
From public funds		58	41	59	44	155	74	106	30	47	62	18	67	32	28	22	1	8	1
TV licence fee[1]		145.50	113.00	183.32	96.43	0.00	91.67	0.00	0.00	0.00	203.87	46.88	0.00	17.53	0.00	0.00	0.00	0.00	0.00
Largest TV platform	*Platform*	Dsat	IPTV	Dsat	DTT	Dcab	Dcab	DTT	DTT	Dcab	Acab	Dsat	DTT	Acab	Asat	Dsat	Acab	Dcab	Dsat
	% of homes	42%	40%	43%	73%	40%	51%	70%	76%	48%	27%	58%	37%	29%	34%	34%	43%	39%	71%
DTV take-up (%)		100%	95%	68%	100%	95%	100%	100%	99%	86%	73%	85%	100%	71%	36%	61%	56%	75%	84%
Pay TV take-up (%)		52.8%	76.3%	57.1%	33.0%	84.1%	69.8%	29.1%	22.0%	98.5%	83.8%	84.2%	62.9%	93.9%	30.6%	68.4%	98.8%	61.0%	17.8%
DSO date		2012	2011	2008	2012	2009	2012	2013	2010	2006	2007	2013	2020	2012	2018	2018	2017	2015	2016
TV viewing (min/day)		232	226	221	261	293	265	201	244	195	159	247	n/a	217	217	239	n/a	159	n/a

Source: IHS / industry data / Ofcom

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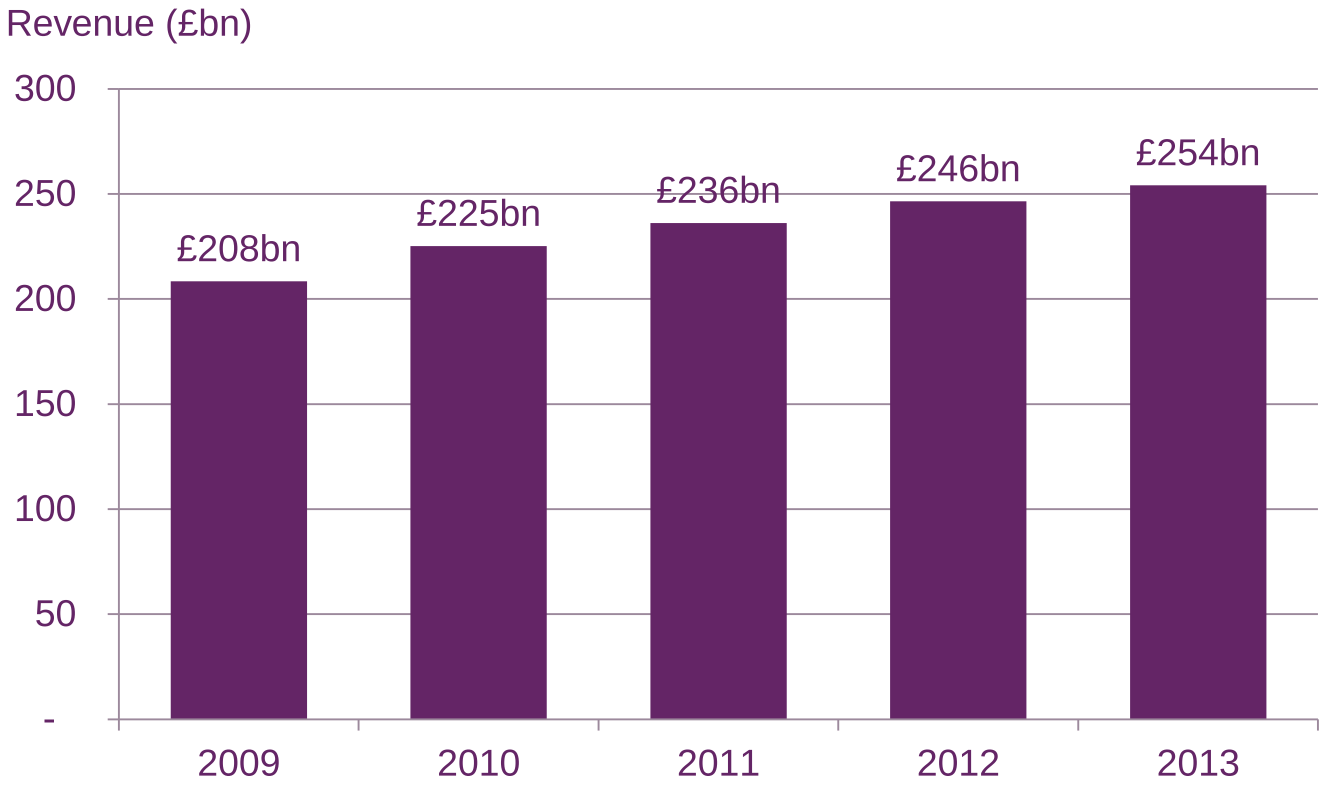
Figure 3.2

Global TV broadcast advertising, public license fee and channel subscription revenues



YOY	CAGR (4yr)
3.1%	5.1%

Source: Data derived from PwC Global Entertainment and Media Outlook: 2014-2018 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.563 to the GBP in line with the IMF average for 2013.

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Figure 3.3

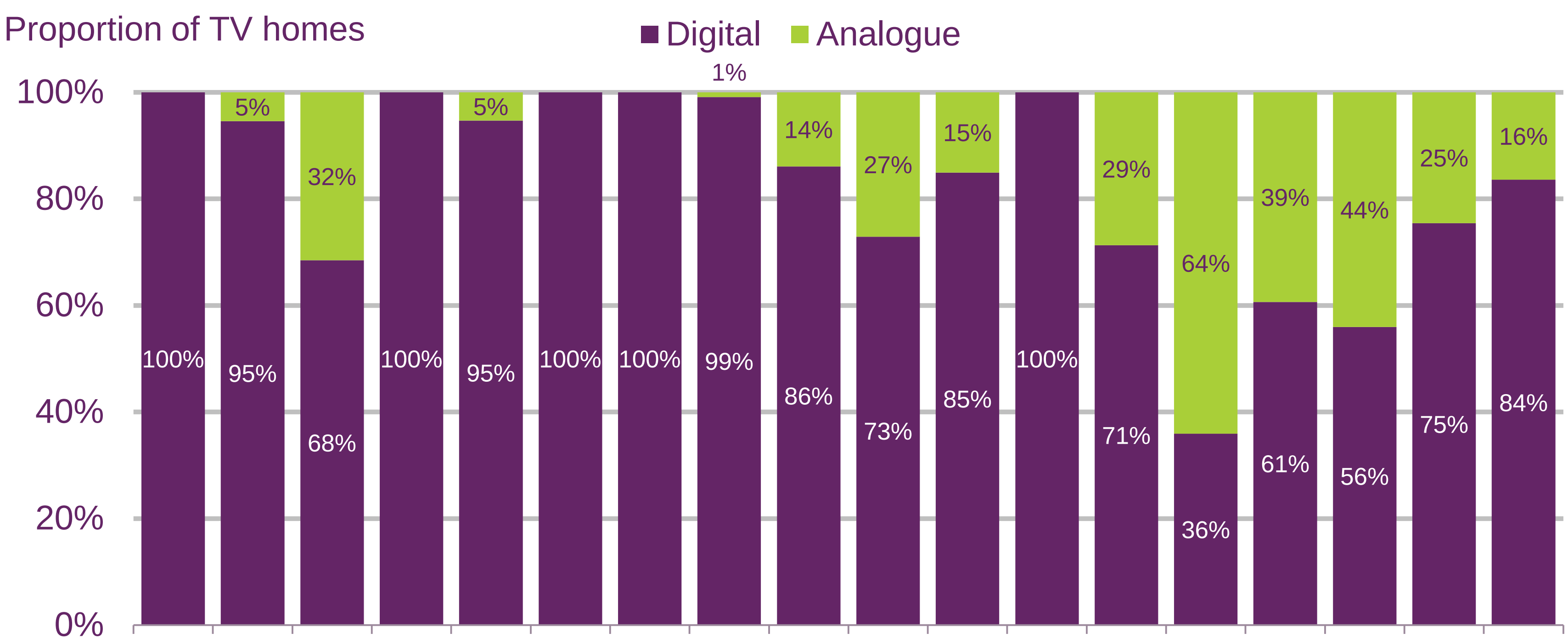
Global TV industry revenues by source

	YOY	CAGR (4yr)
Advertising	1.9%	5.3%
Public TV license fees	1.6%	1.5%
Subscriptions	4.4%	5.7%
All	3.1%	5.1%

Source: Data derived from PwC Global Entertainment and Media Outlook: 2014-2018 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.563 to the GBP in line with the IMF average for 2013.

Figure 3.4

Take-up of digital and analogue television: 2013



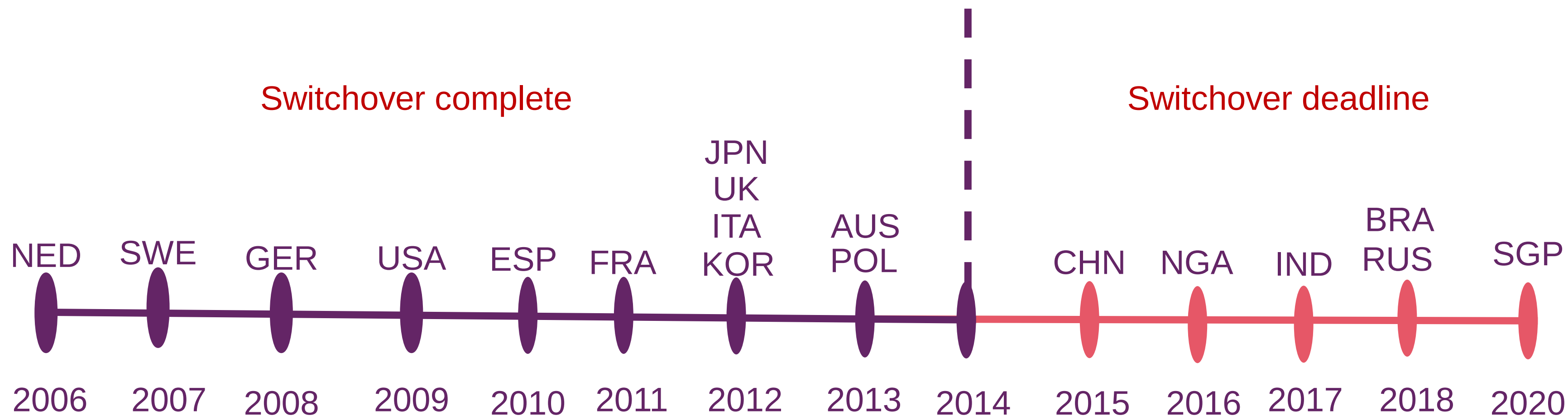
	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Year-on-year change (pp)	0	+1	+2	0	+2	0	+4	0	+3	-1	+7	+9	+5	+6	+11	+11	+13	+1

Source: IHS/ industry data/ Ofcom

Figure 3.5

Figure 3.5

Timeline for digital switchover, by country and date



Source: IHS / industry data / Ofcom

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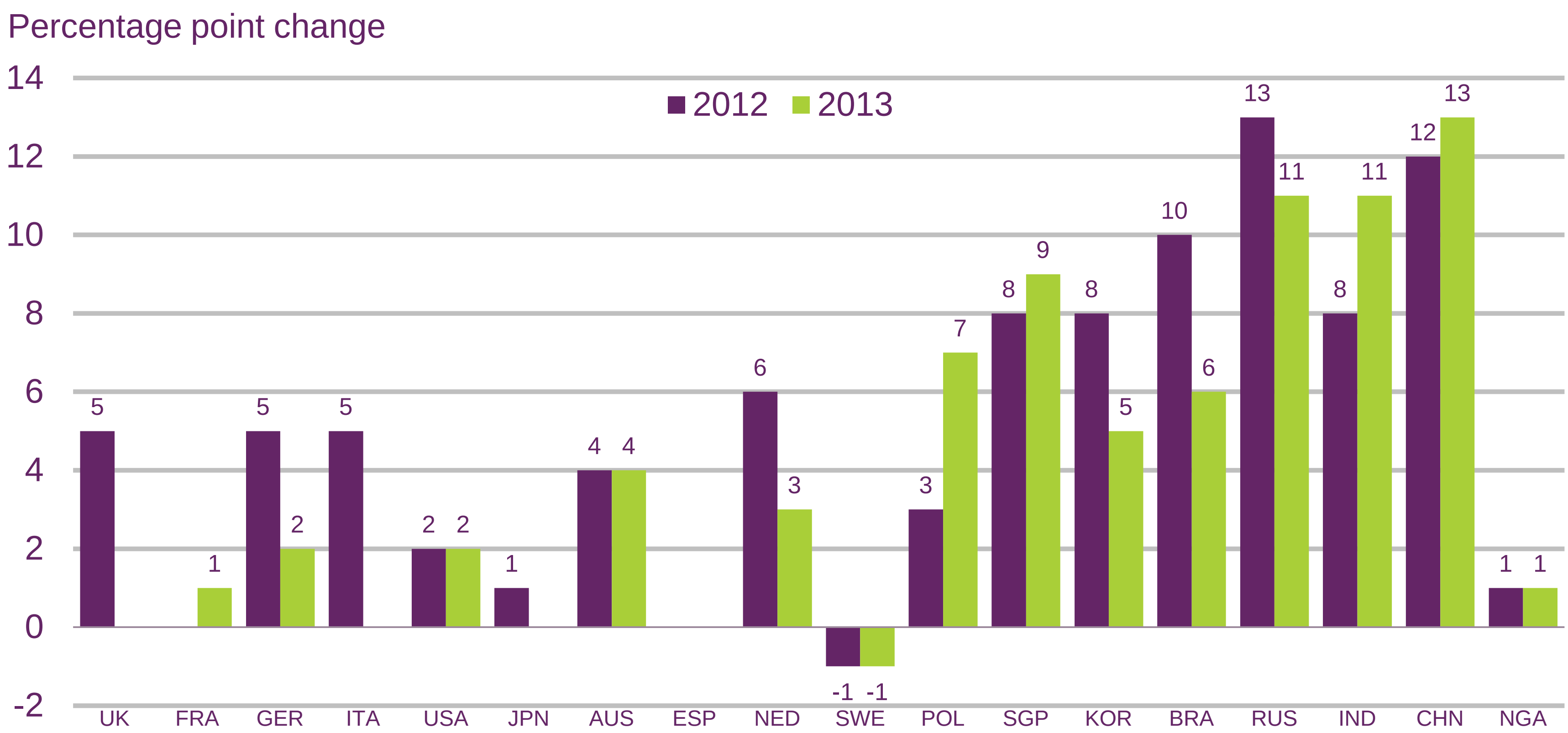
Figure 3.6

Percentage point change in DTV take-up: 2012 and 2013

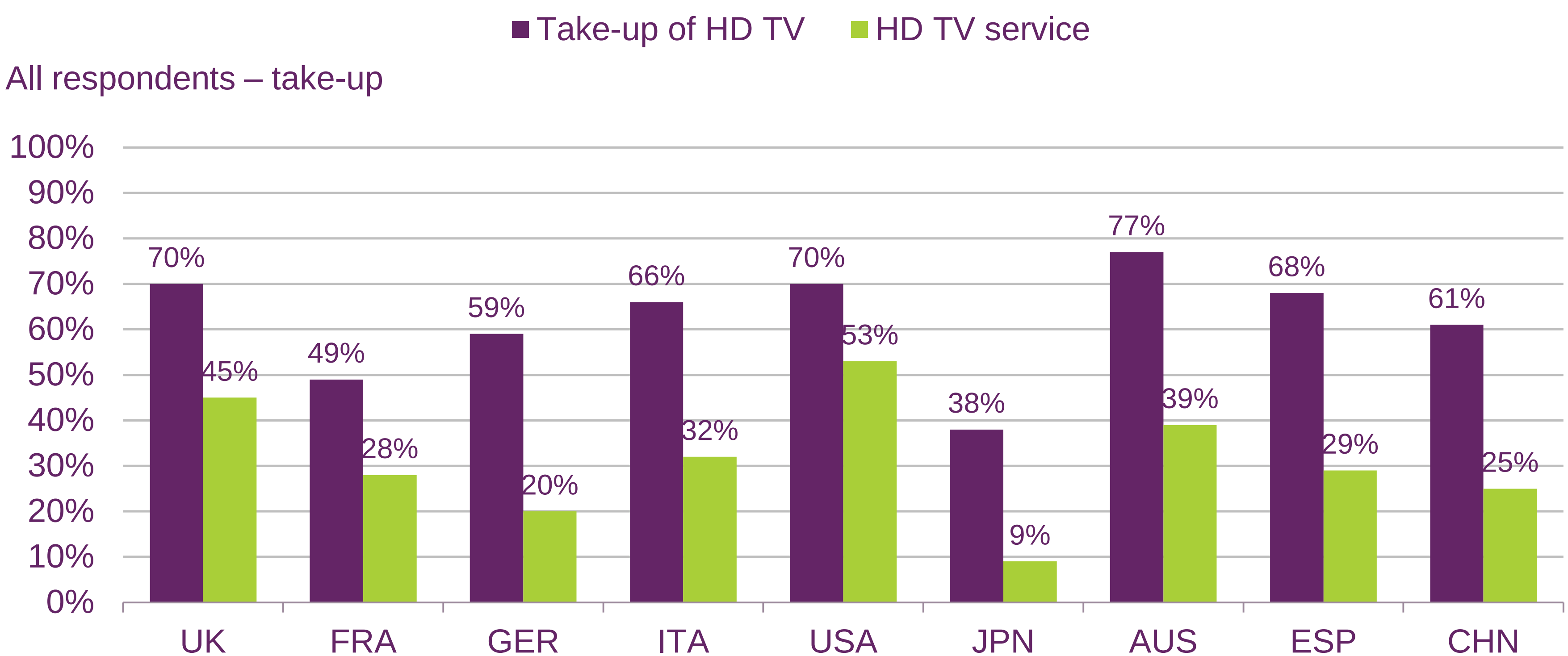


	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
2year change (pp)	+5	+1	+7	+5	+4	+1	+8	0	+9	-2	+10	+17	+13	+16	+24	+19	+25	+2

Source: IHS/ industry data/ Ofcom

Figure 3.7

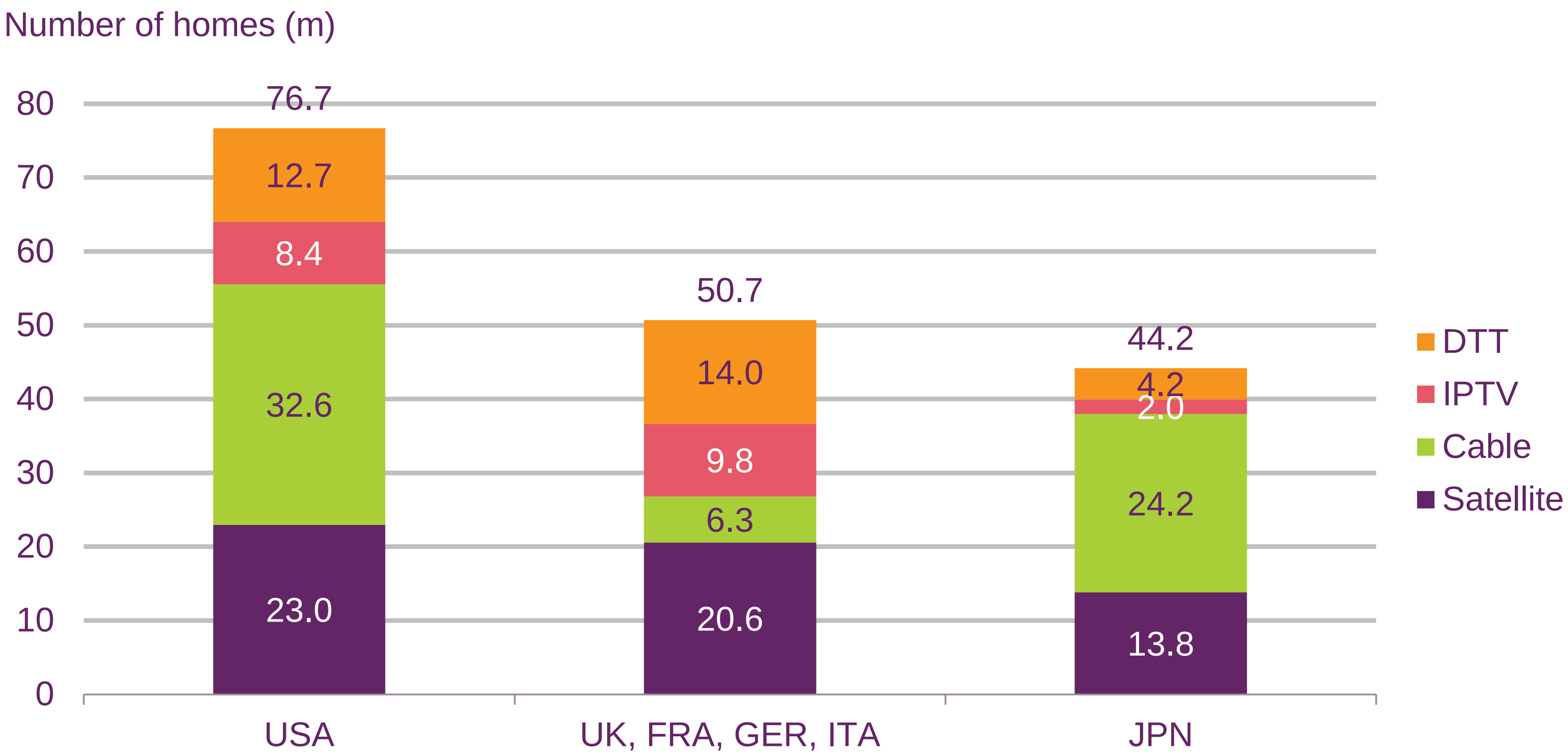
Household ownership of high definition TV sets and HD TV services



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.
Q3a. Which of the following devices do you have in your home? Q3b. Which of the following services do you have in your home?

Figure 3.8

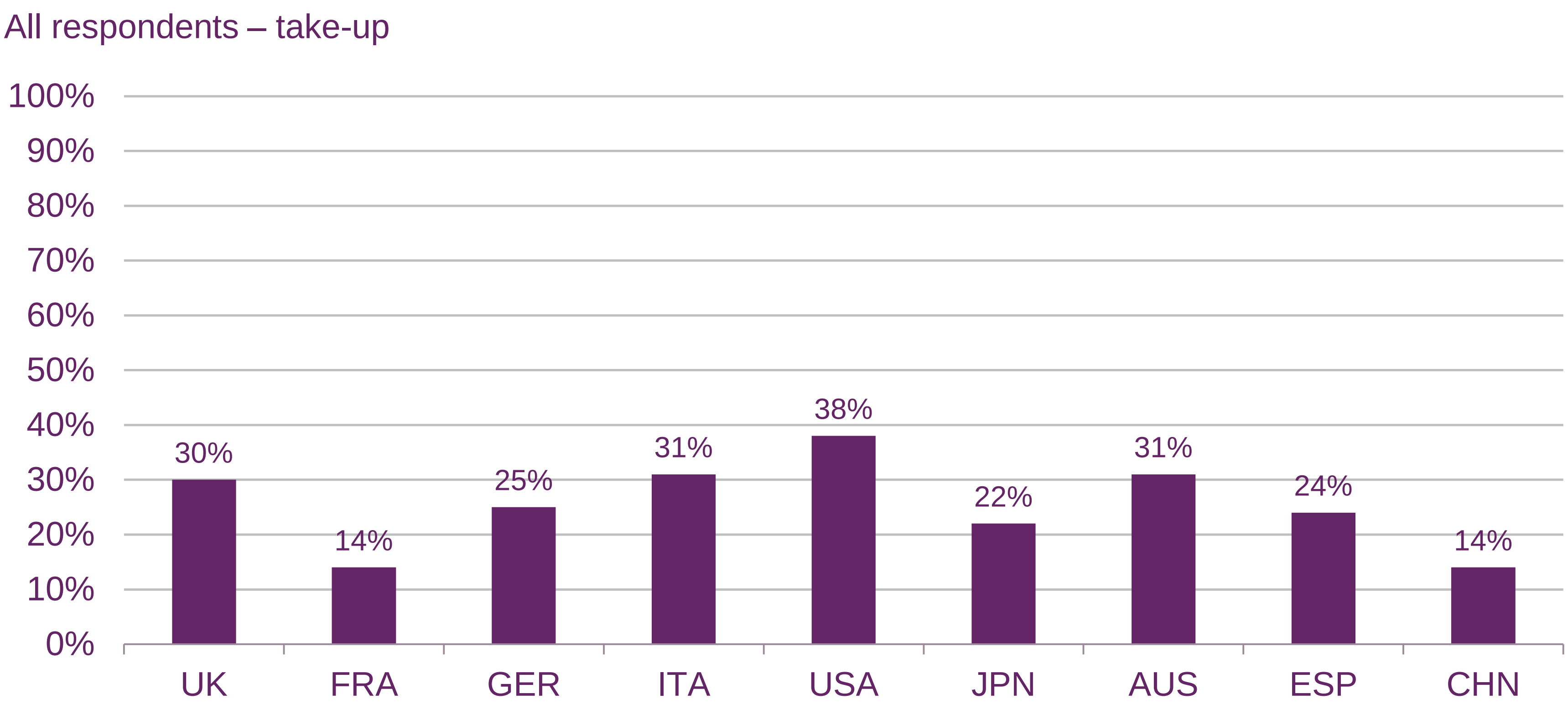
Number of HD homes, by platform and country: 2013



Source: IHS/ industry data/ Ofcom. Note: figures are for HD-enabled homes, meaning homes having the technical means to view HD content and source of HD content.

Figure 3.9

Household ownership of DVR

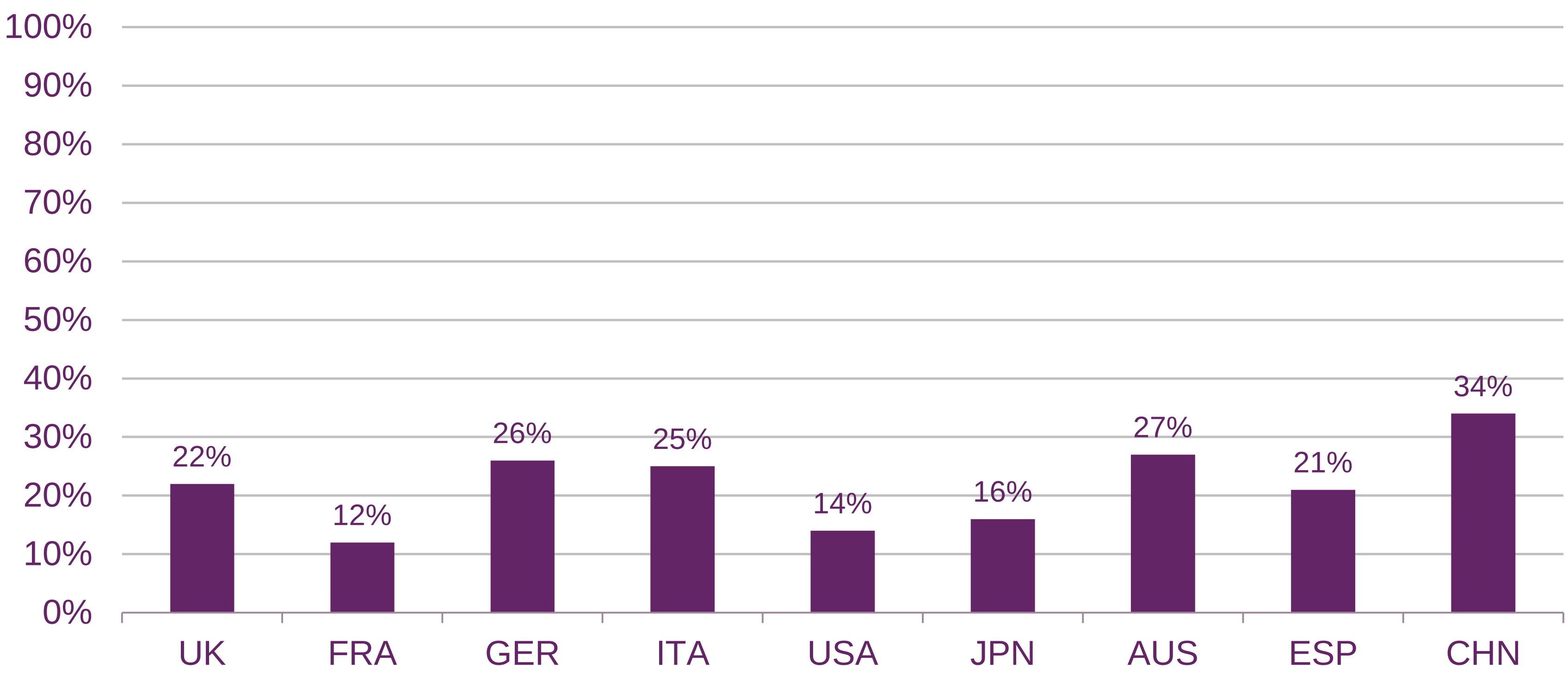


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011 FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q3a. Which of the following devices do you have in your home?

Figure 3.10

Household ownership of smart TV sets

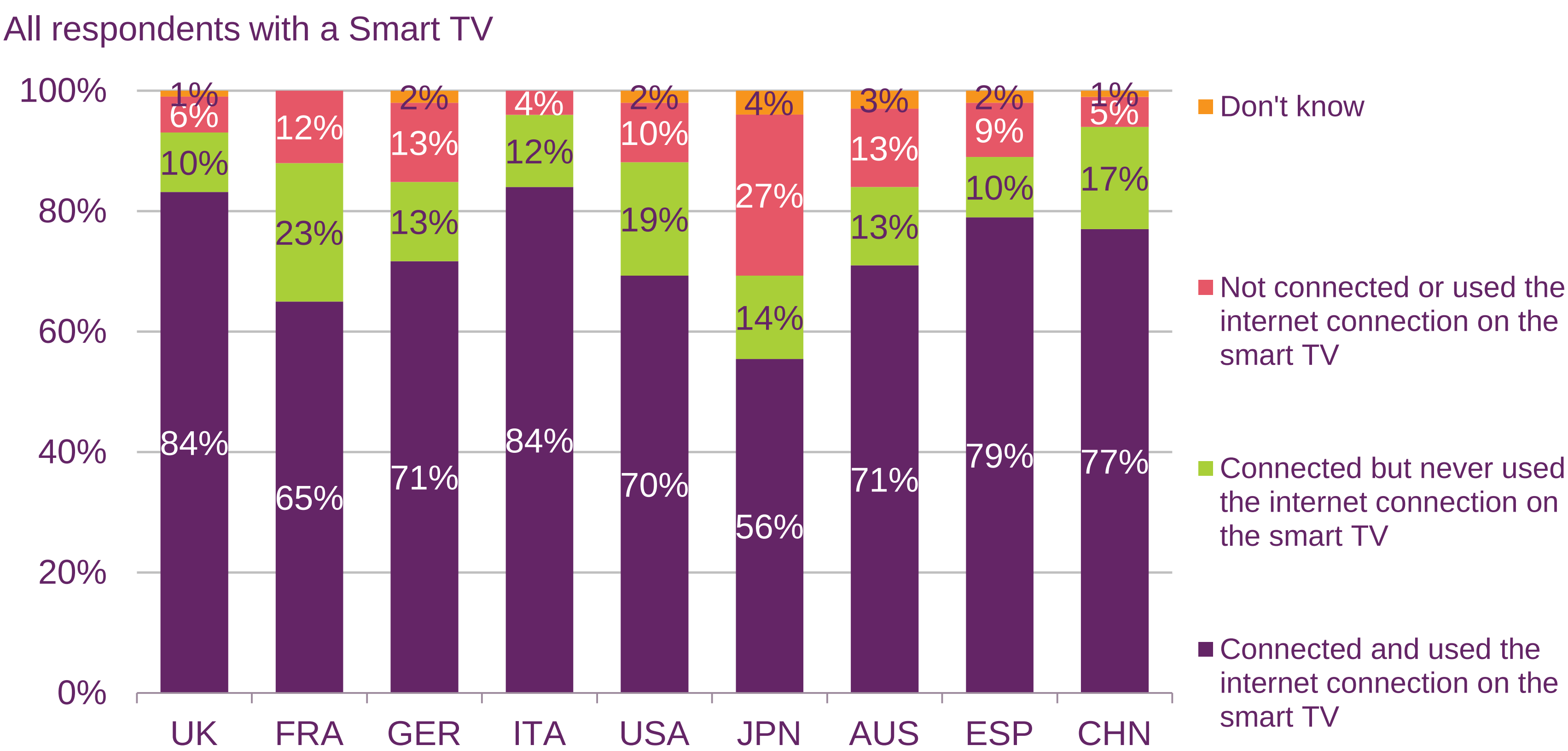
All respondents – take-up



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.
Q3a. Which of the following devices do you have in your home?

Figure 3.11

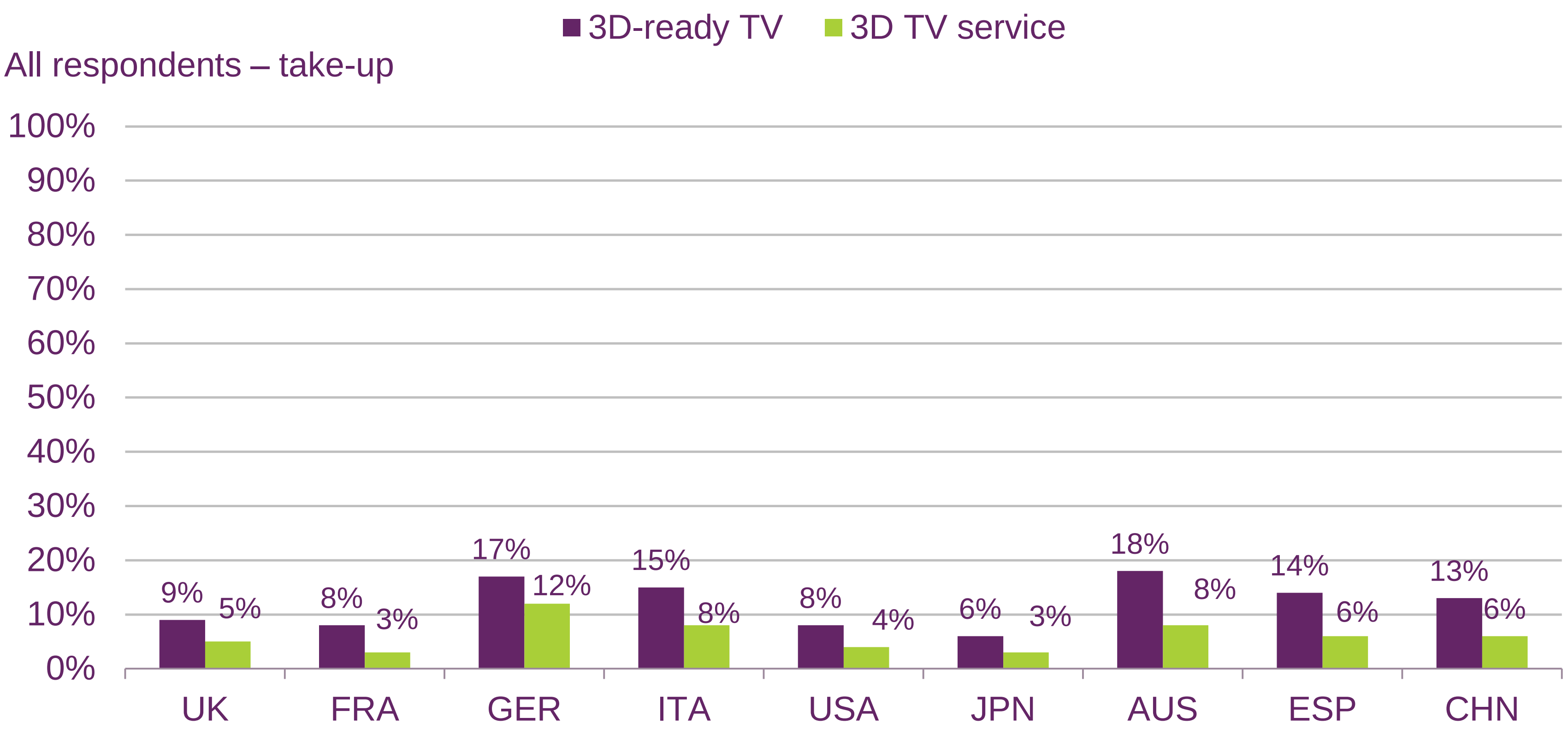
Personal internet use on a Smart TV



Source: Ofcom consumer research October 2014
Base: All respondents with a Smart TV, UK=214, FRA=121, GER=258, ITA=256, USA=142, JPN=164, AUS=270, ESP=210, CHN=357.
Q.4a(i) Which of the following comes closest to your use of the internet connection on your Smart TV? I have...

Figure 3.12

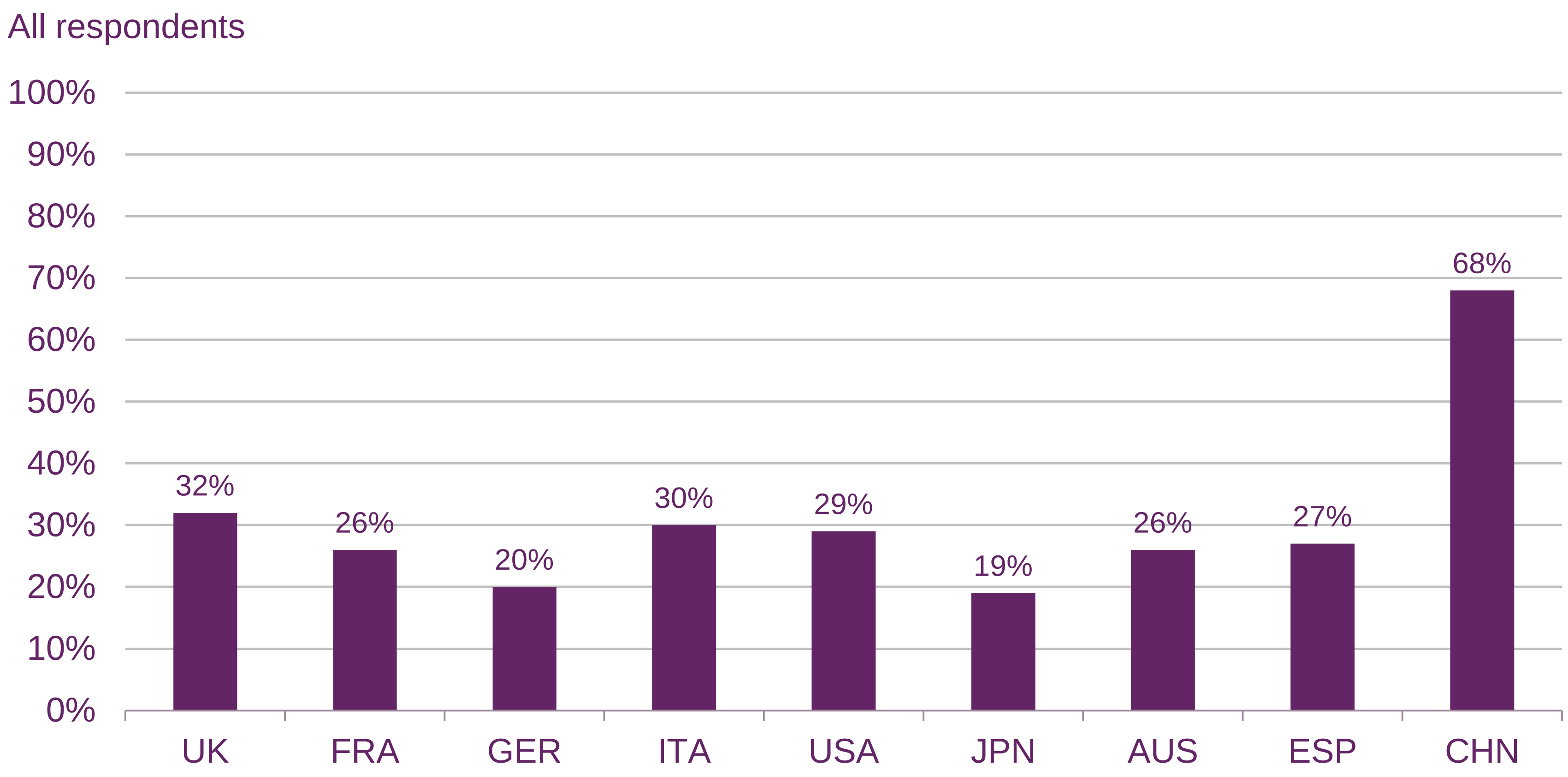
Household ownership of 3D-ready television sets and 3D TV television services



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.
Q3a. Which of the following devices do you have in your home?

Figure 3.13

Weekly access of TV content over the internet

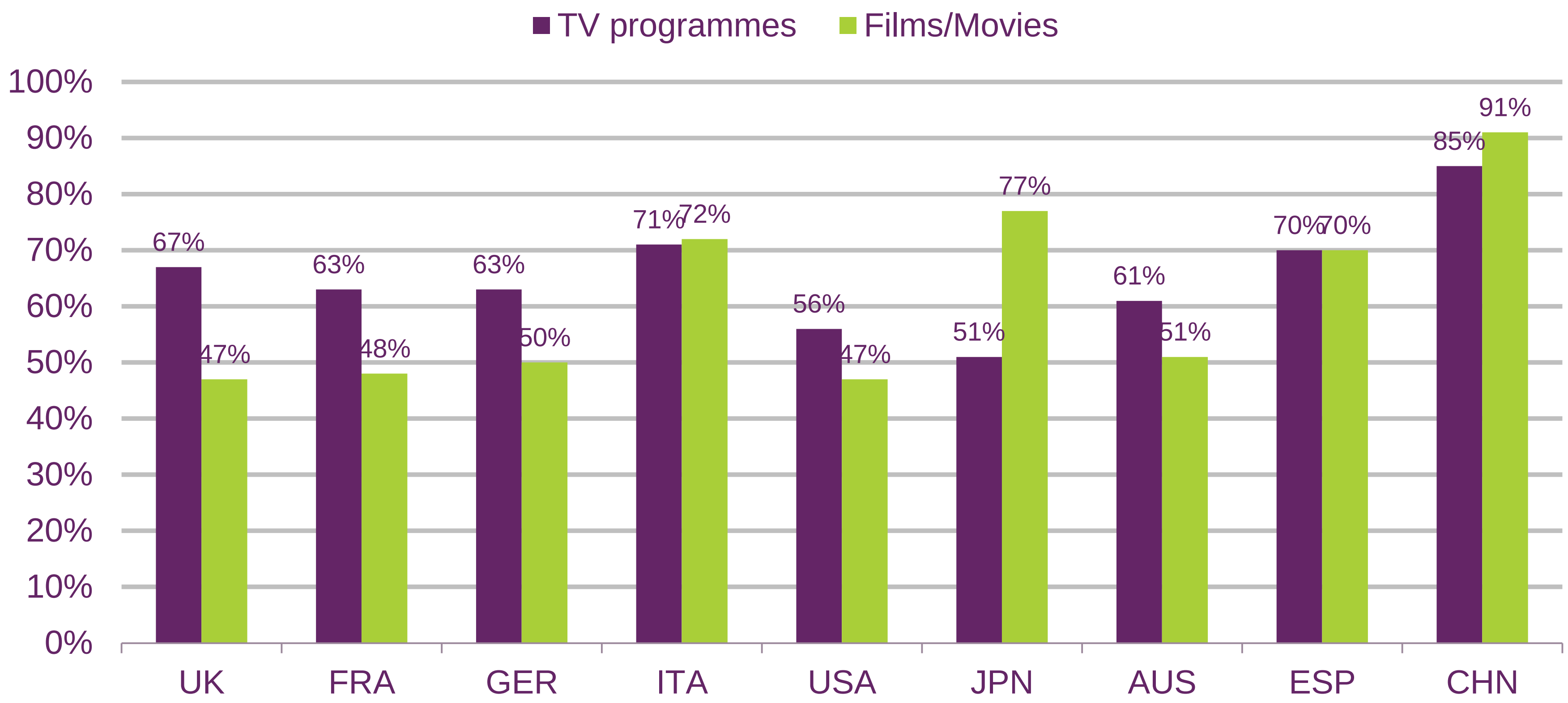


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q.8 Which, if any, of the following activities do you use your internet connection for at least once a week?

Figure 3.14

Ever accessed TV programmes or films/movies online

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.20 Have you ever accessed the following content online?

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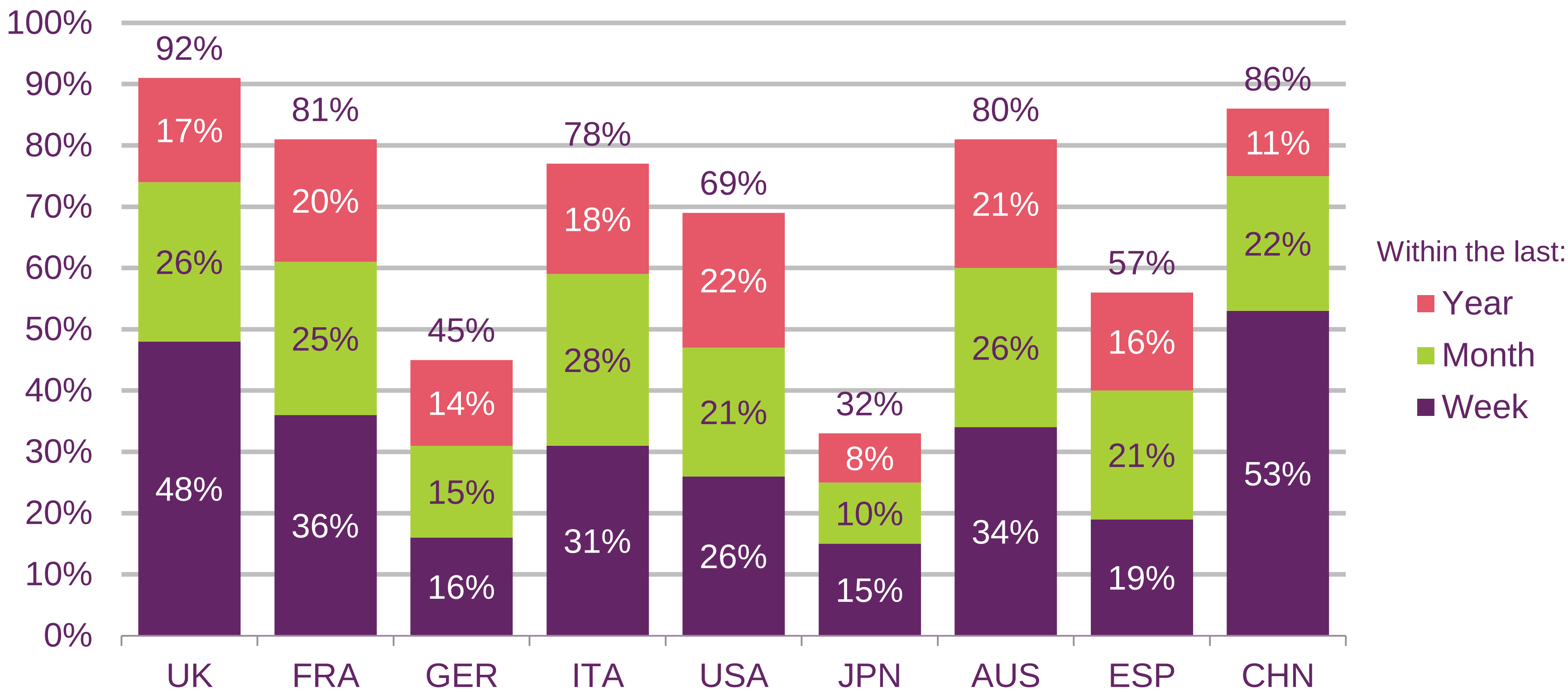
Figure 3.15

Recent use of free-to-access broadcaster catch-up TV services

All who had ever watched TV or films online

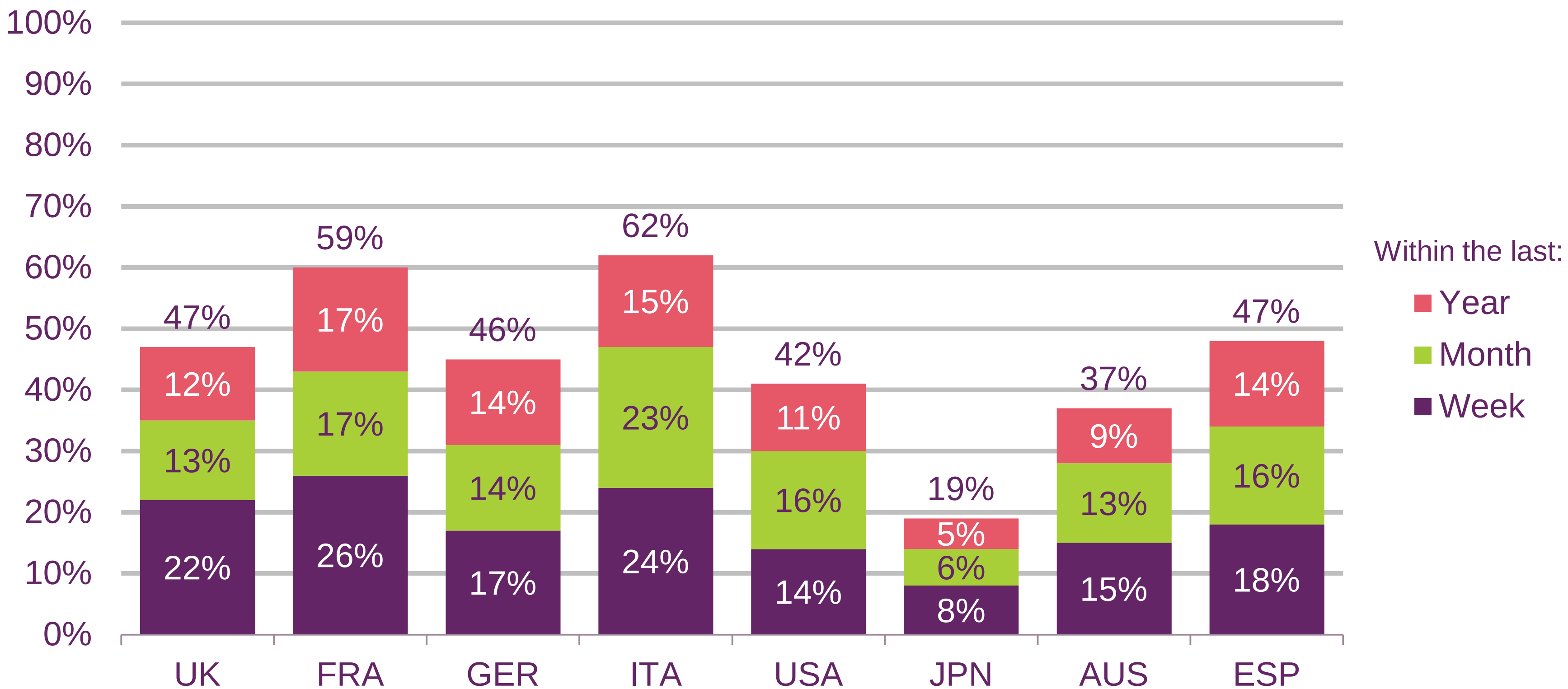


Source: Ofcom consumer research October 2014.
Base: all who had ever watched TV or films online (UK=704, France=689, Spain=822, Germany=707, Italy=828, USA=591, Japan=813, Australia=648, China=948)
Q.21. When did you last use the following online services to watch TV programmes or films?

Figure 3.16

Recent use of catch-up or on-demand services through a Pay-TV provider

All who had ever watched TV or films online

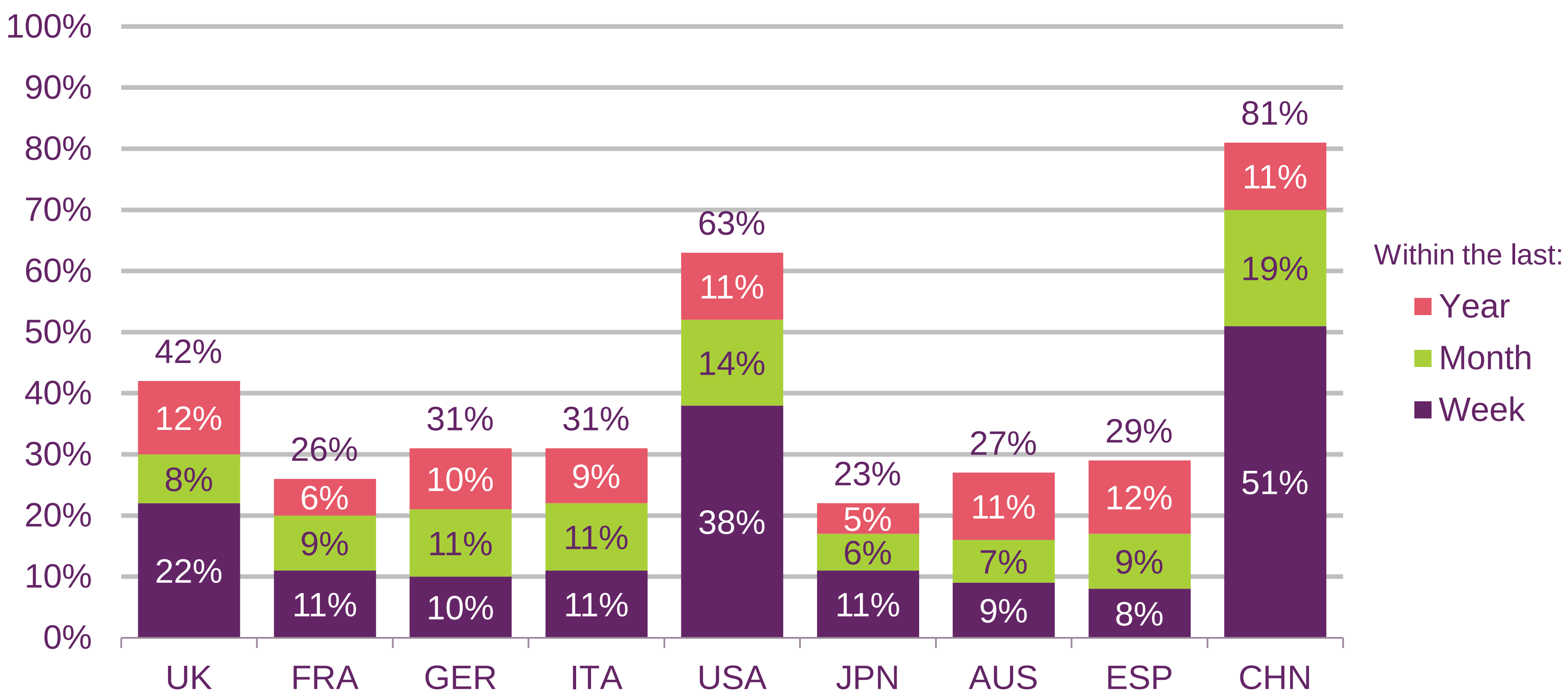


Source: Ofcom consumer research October 2014.
Base: all who had ever watched TV or films online (UK=704, France=689, Spain=822, Germany=707, Italy=828, USA=591, Japan=813, Australia=648)
Q.21. When did you last use the following online services to watch TV programmes or films?
Note: China not asked this question.

Figure 3.17

Recent use of non-broadcaster subscription video-on-demand services

All who had ever watched TV or films online

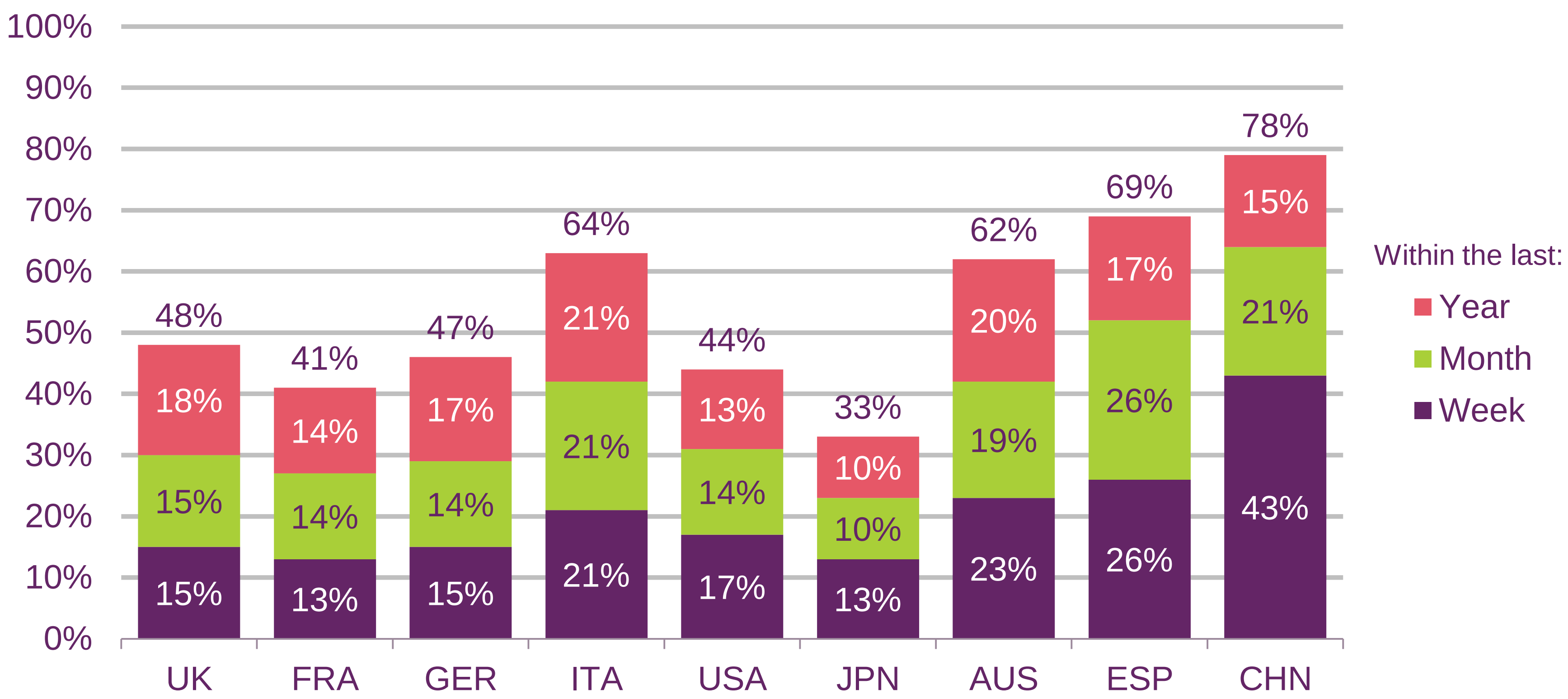


Source: Ofcom consumer research October 2014.
Base: all who had ever watched TV or films online (UK=704, France=689, Spain=822, Germany=707, Italy=828, USA=591, Japan=813, Australia=648, China=948)
Q.21. When did you last use the following online services to watch TV programmes or films?

Figure 3.18

Recent use of download to rent/own services for TV and films

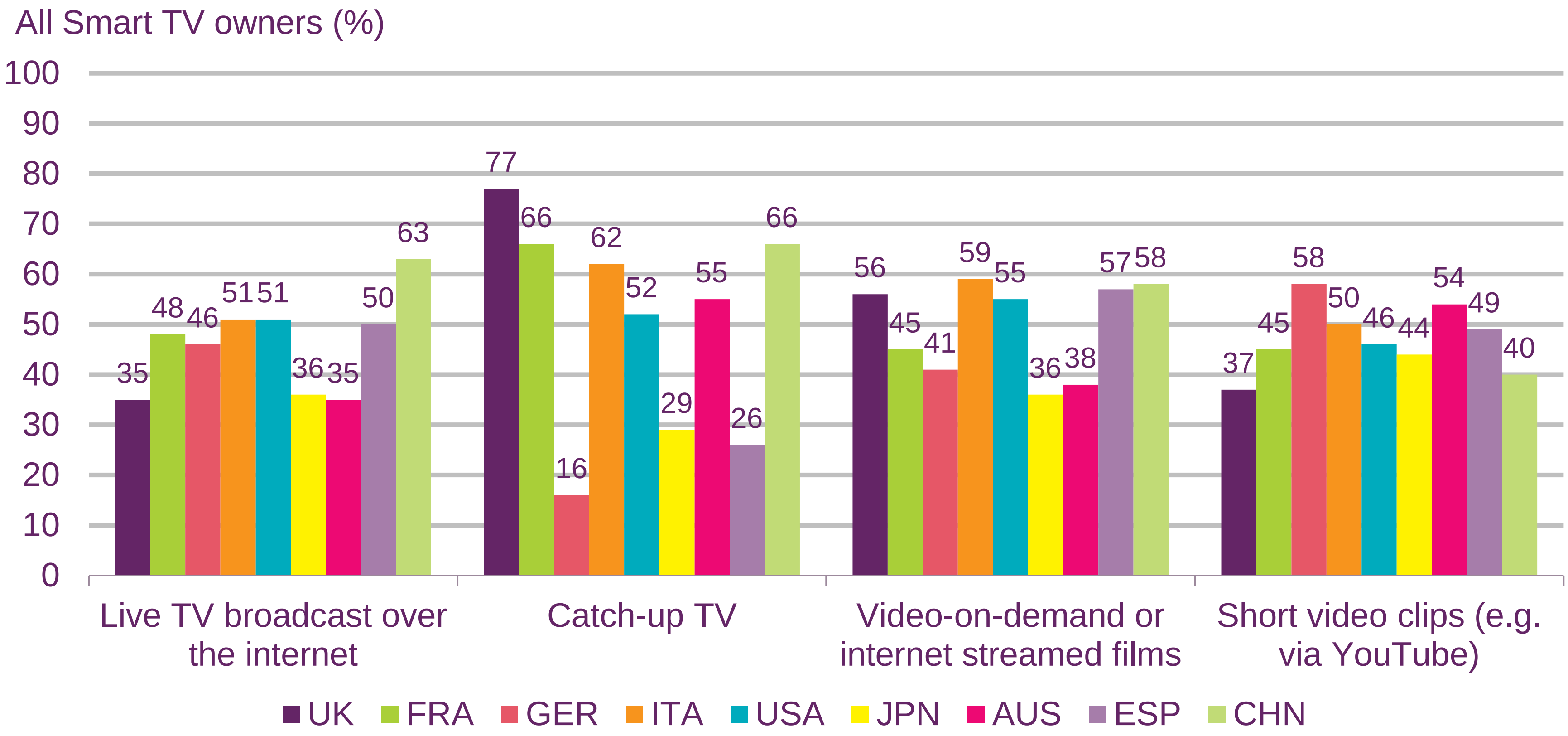
All who had ever watched TV or films online



Source: Ofcom consumer research October 2014.
Base: all who had ever watched TV or films online (UK=704, France=689, Spain=822, Germany=707, Italy=828, USA=591, Japan=813, Australia=648, China=948)
Q.21. When did you last use the following online services to watch TV programmes or films?

Figure 3.19

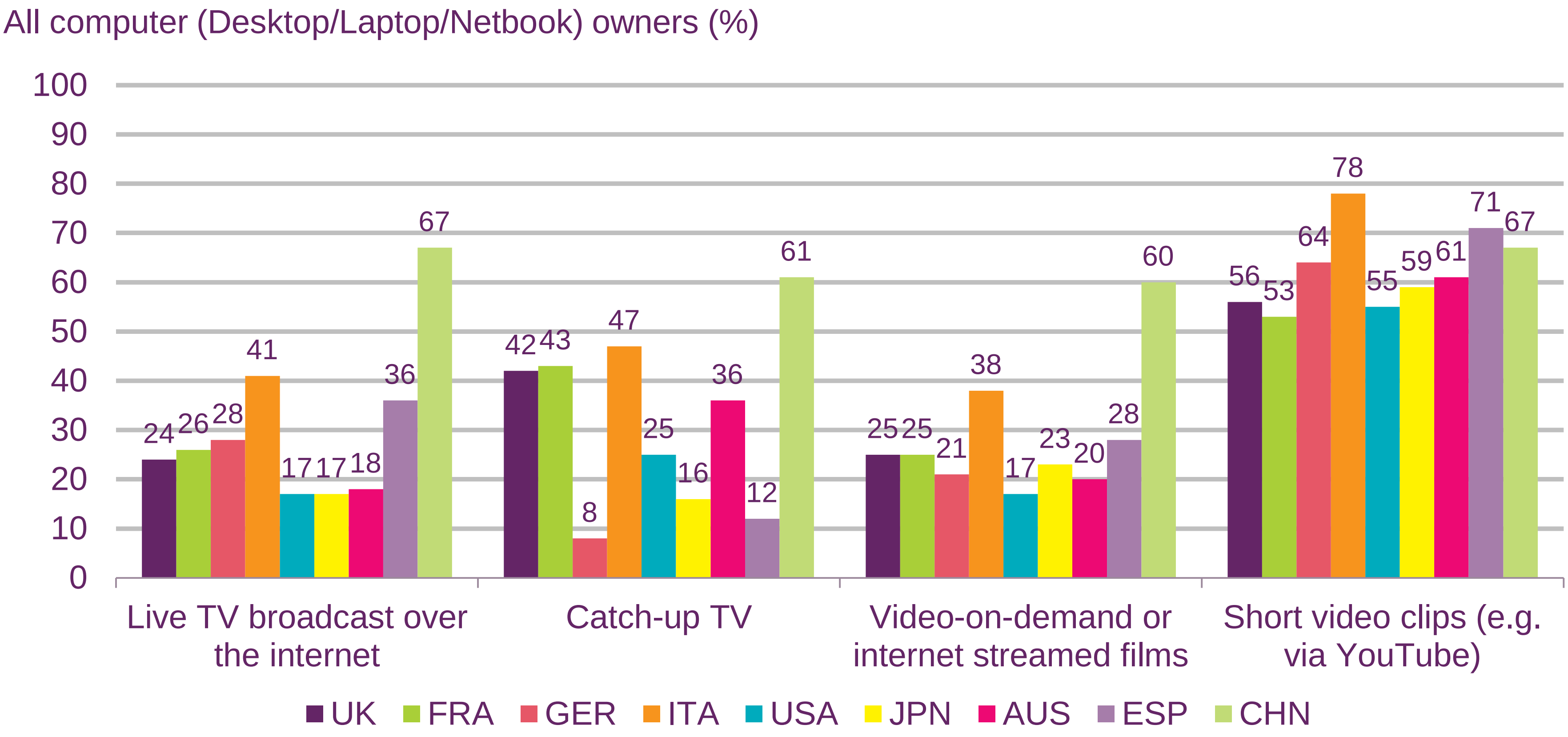
Types of AV content watched on a Smart TV



Source: Ofcom consumer research October 2014.
Base: all Smart TV owners – UK=117, France=50, Germany=114, Italy=136, USA=71*, Japan=59*, Australia=129, Spain=104, China=178. *Caution: bases under 100.*
Q9c. What sorts of video content do you watch on each of your devices over the internet?

Figure 3.20

Types of AV content watched on a desktop/laptop/notebook

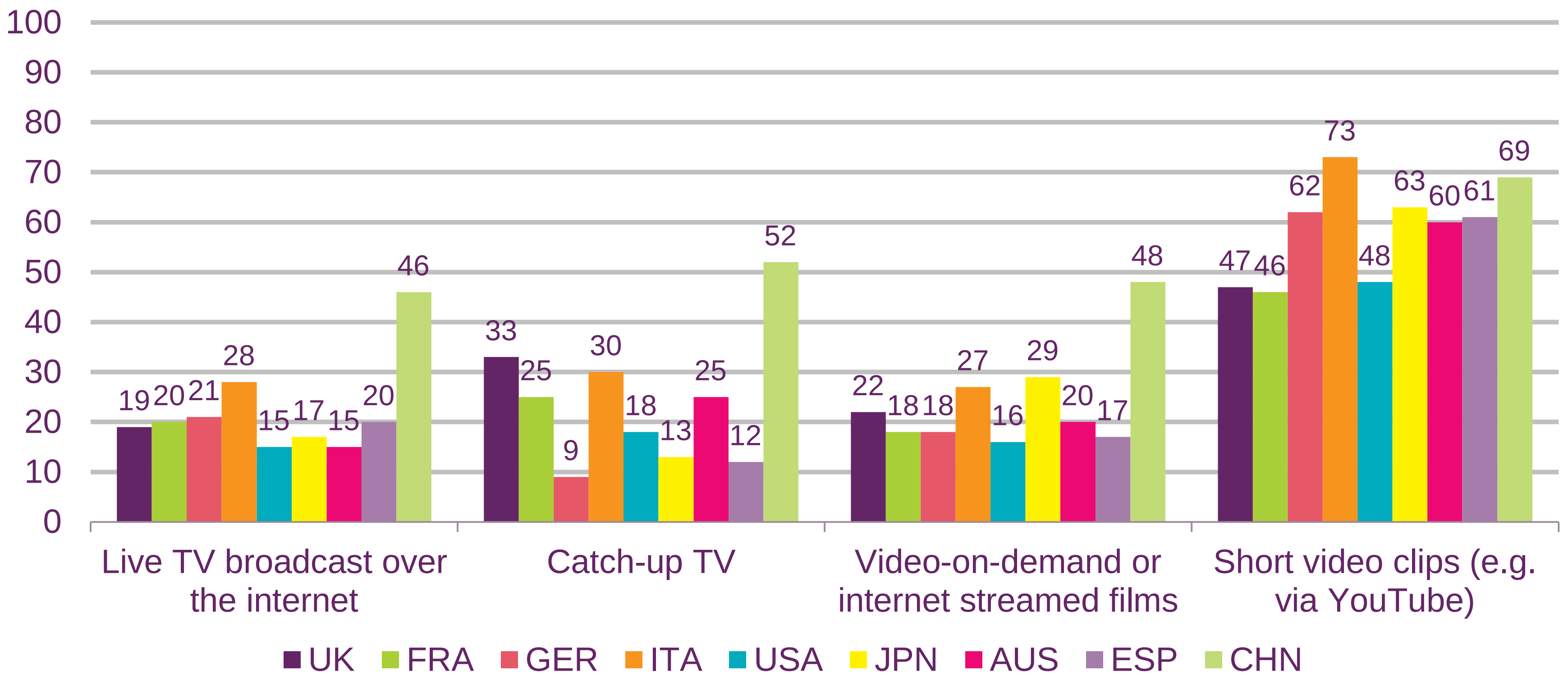


Source: Ofcom consumer research October 2014.
Base: All computer owners - UK=905, France=953, Germany=949, Italy=902, USA=907, Japan=934, Australia=944, Spain=903, China=947
Q9c. What sorts of video content do you watch on each of your devices over the internet?

Figure 3.21

Types of AV content watched on a tablet

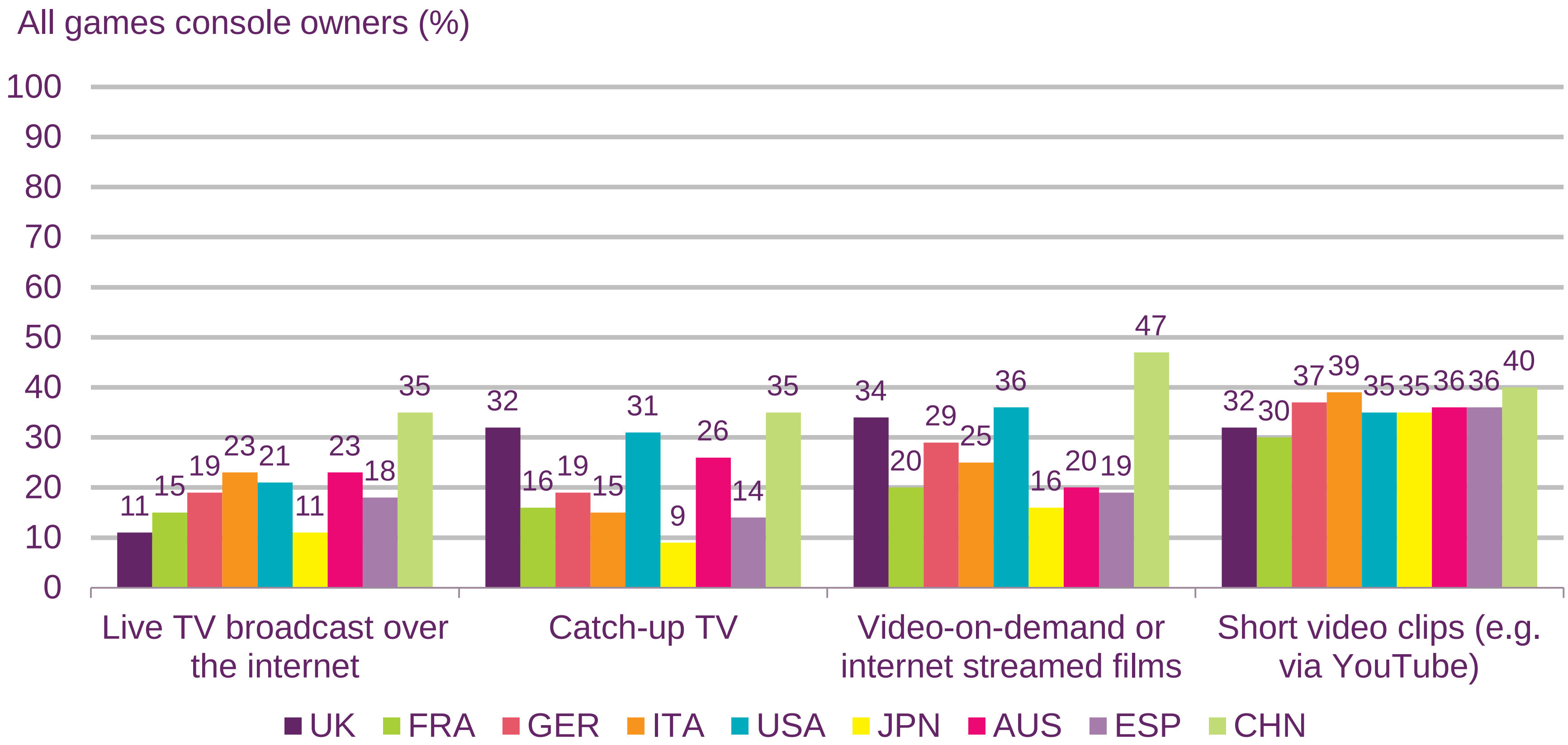
All tablet owners (%)



Source: Ofcom consumer research October 2014.
Base: All tablet owners - UK=318, France=270, Germany=263, Italy=384, USA=274, Japan=209, Australia=325, Spain=394, China=446.
Q9c. What sorts of video content do you watch on each of your devices over the internet?

Figure 3.22

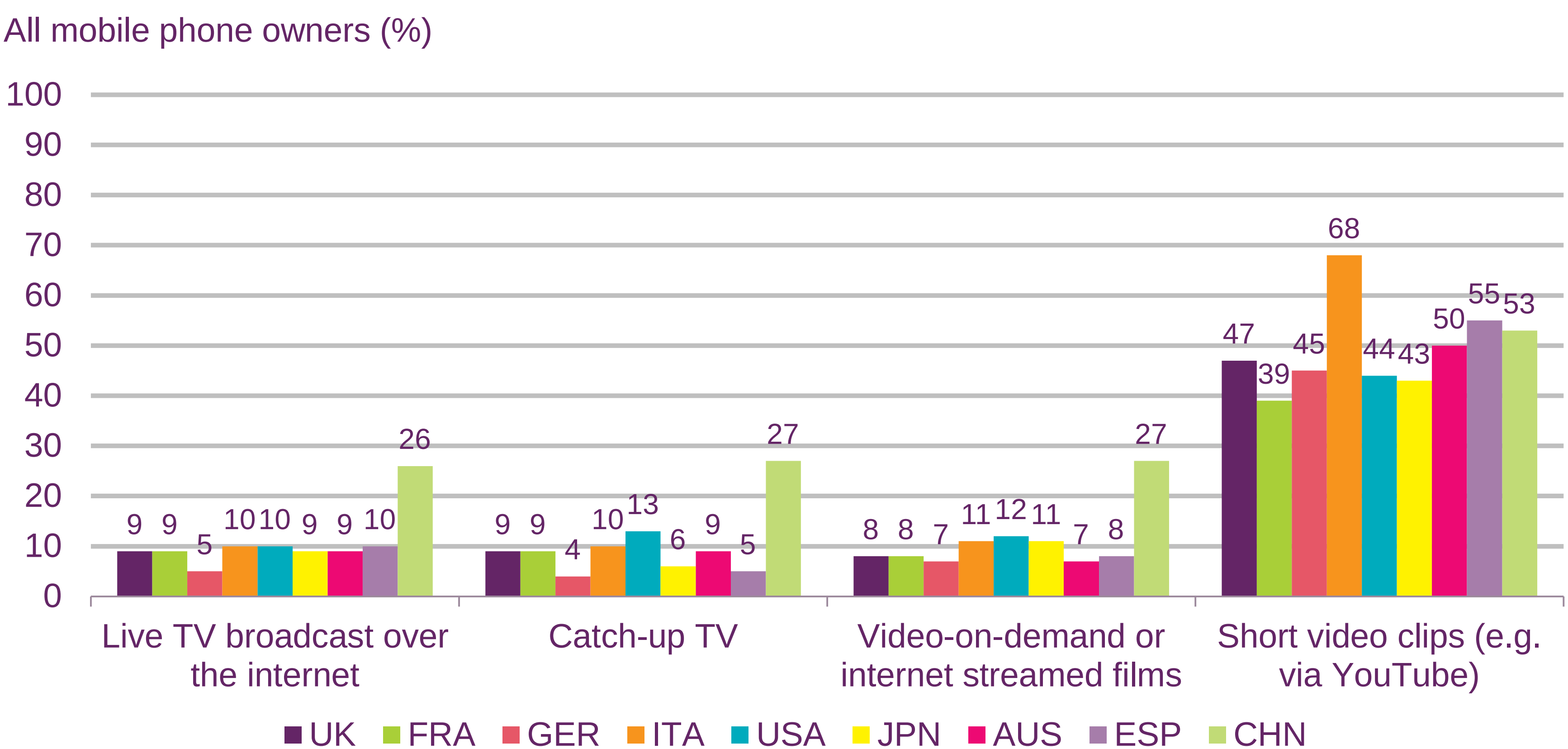
Types of AV content watched on a games console attached to a TV



Source: Ofcom consumer research October 2014.
Base: All games console owners - UK=318, France=270, Germany=263, Italy=384, USA=274, Japan=209, Australia=325, Spain=394, China=446.
Q9c. What sorts of video content do you watch on each of your devices over the internet?

Figure 3.23

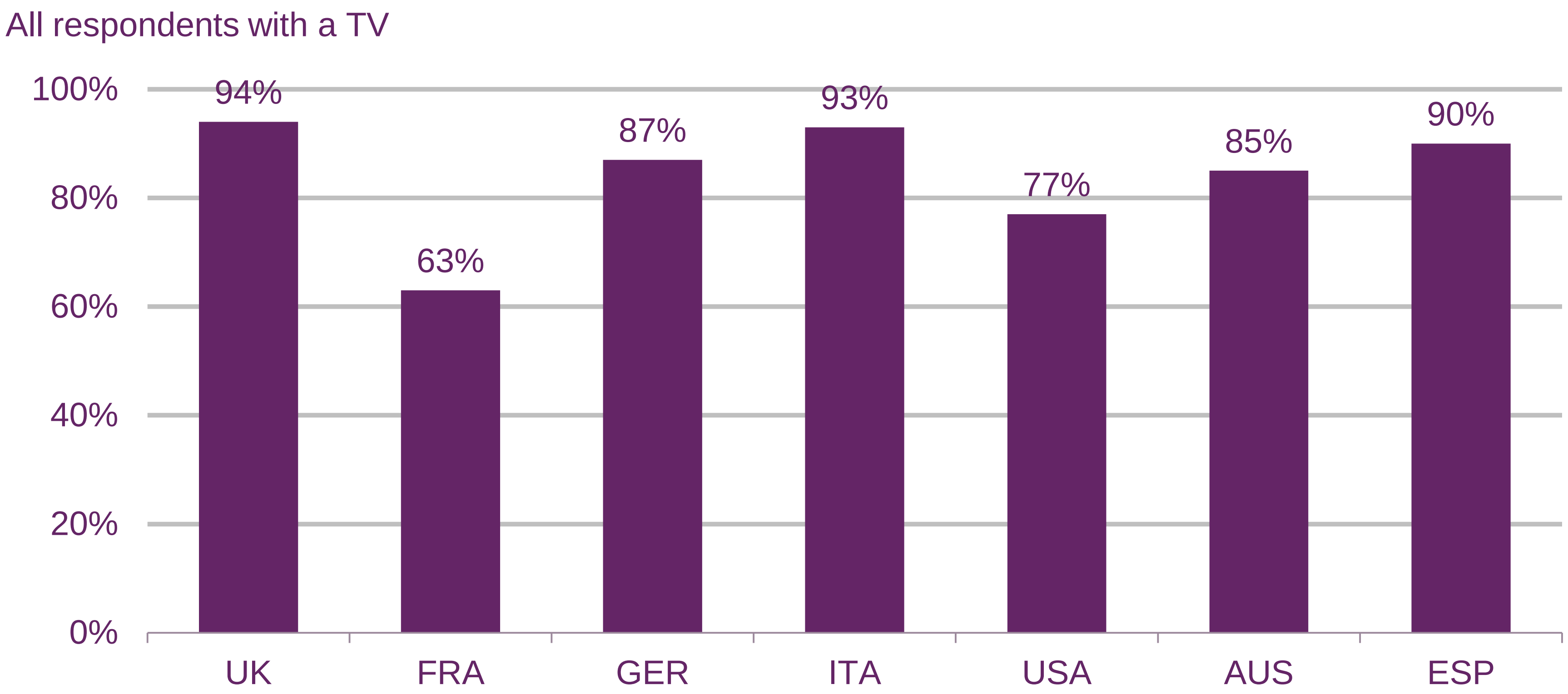
Types of AV content watched on a mobile phone



Source: Ofcom consumer research October 2014.
Base: All mobile phone owners - UK=540, France=469, Germany=531, Italy=762, USA=443, Japan=566, Australia=579, Spain=742, China=808.
Q9c. What sorts of video content do you watch on each of your devices over the internet?

Figure 3.24

Awareness of the watershed



Source: Ofcom Consumer Research October 2014

Base: All respondents with a TV, UK=941, FRA=978, GER=968, ITA=971, USA=932, AUS=958, ESP=961

Q.18 Broadcasters are required to show television programmes which are not suitable for children only after a certain time in the evening. Before now, were you aware of this?

Note: Japan and China have been excluded from this analysis as they don't have broadcasting requirements comparable with the UK watershed.

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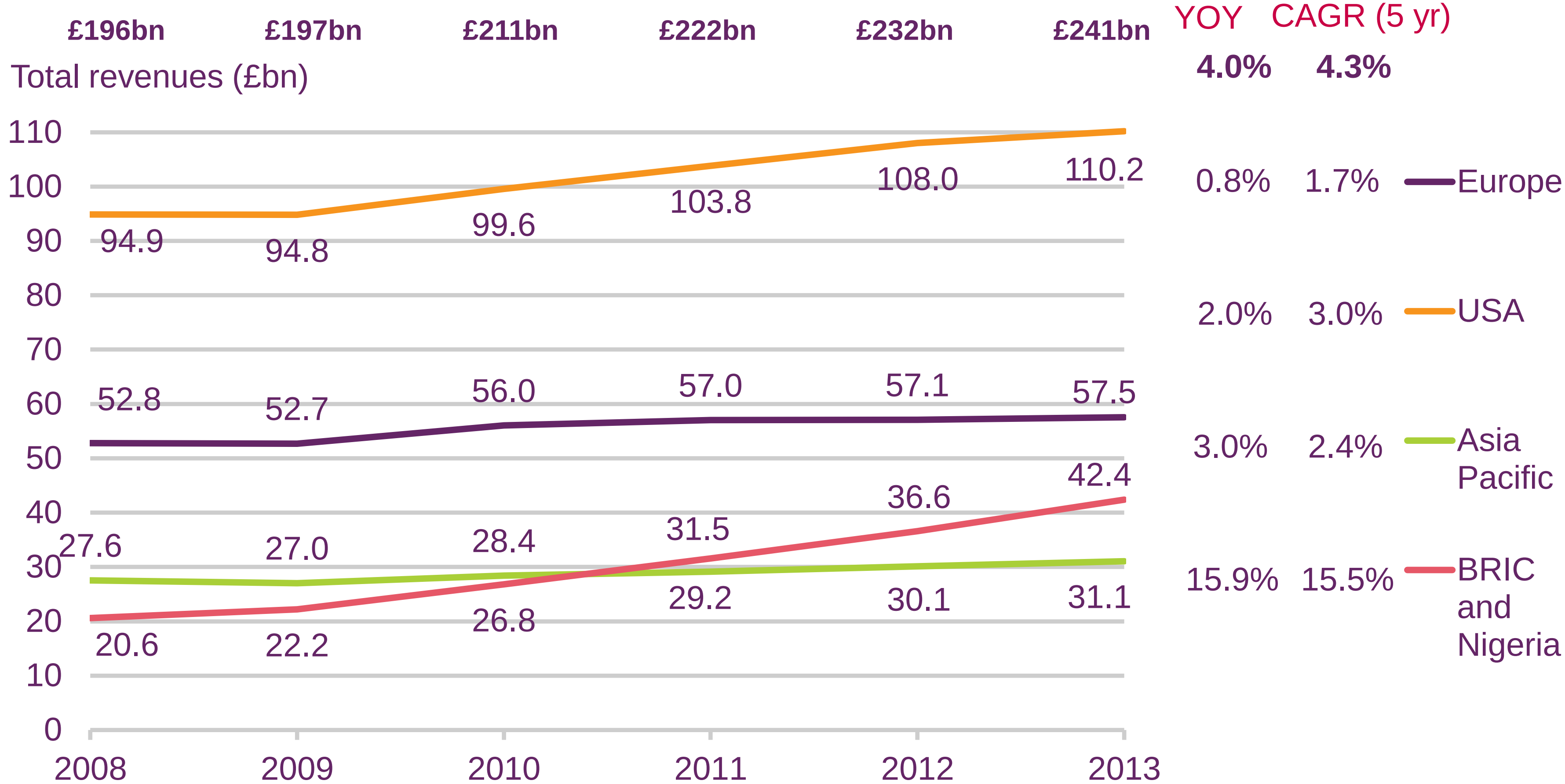
Figure 3.25
Total TV industry revenues among comparator countries



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only. BRIC is Brazil, Russia, India and China.

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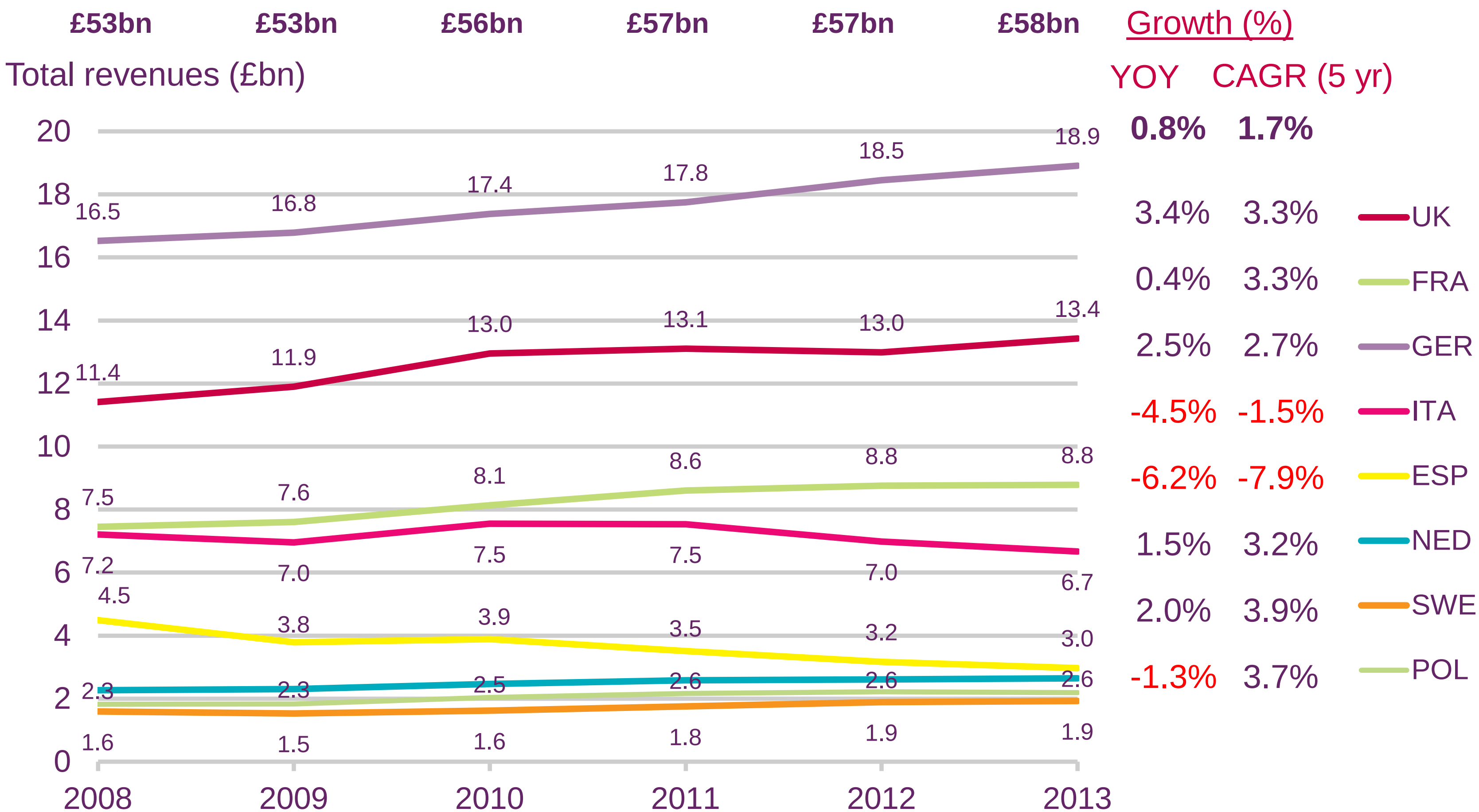
Figure 3.26

TV industry revenues among European countries



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only.

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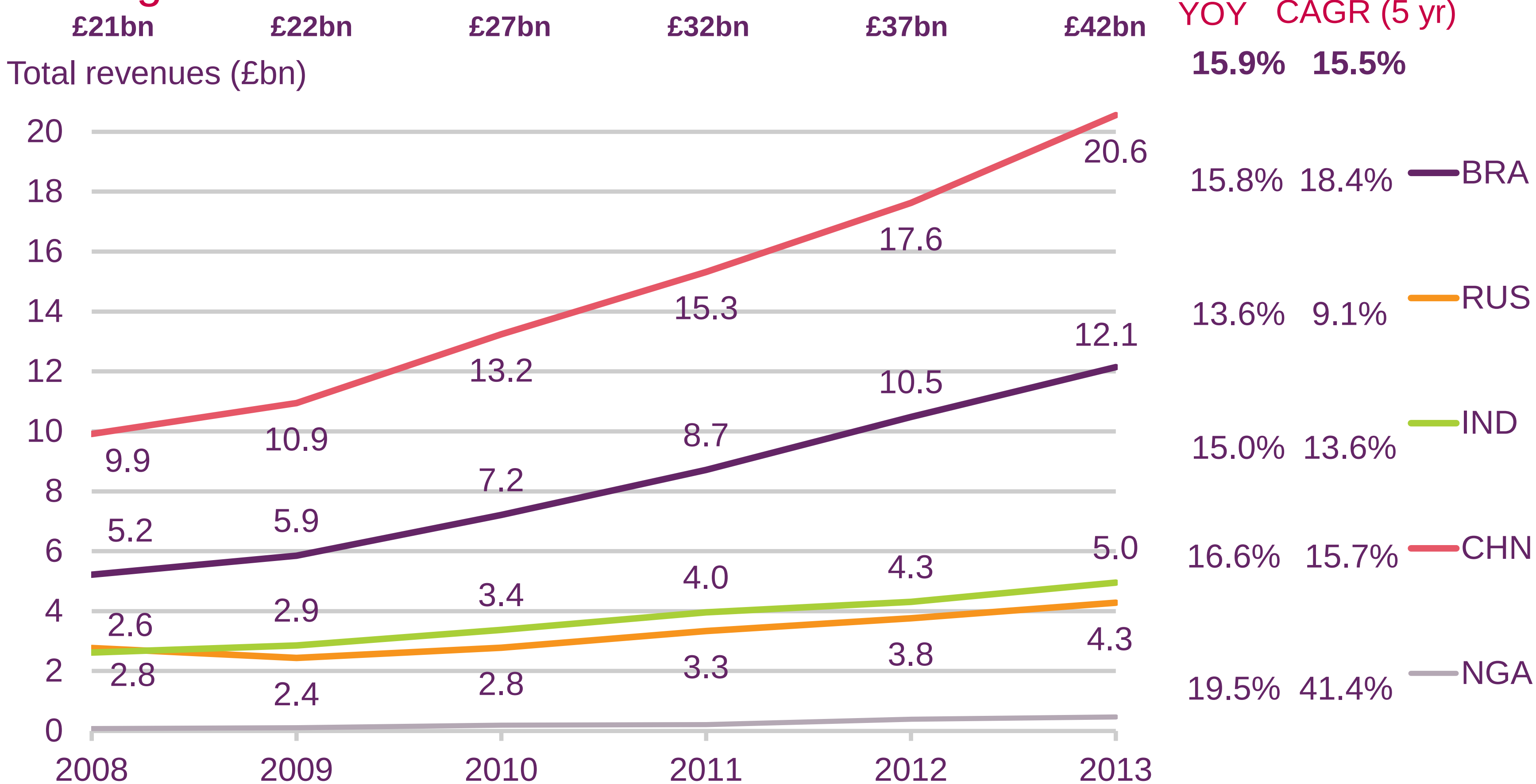
Figure 3.27

Total TV industry revenues among BRIC countries and Nigeria



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only. BRIC is Brazil, Russia, India and China.

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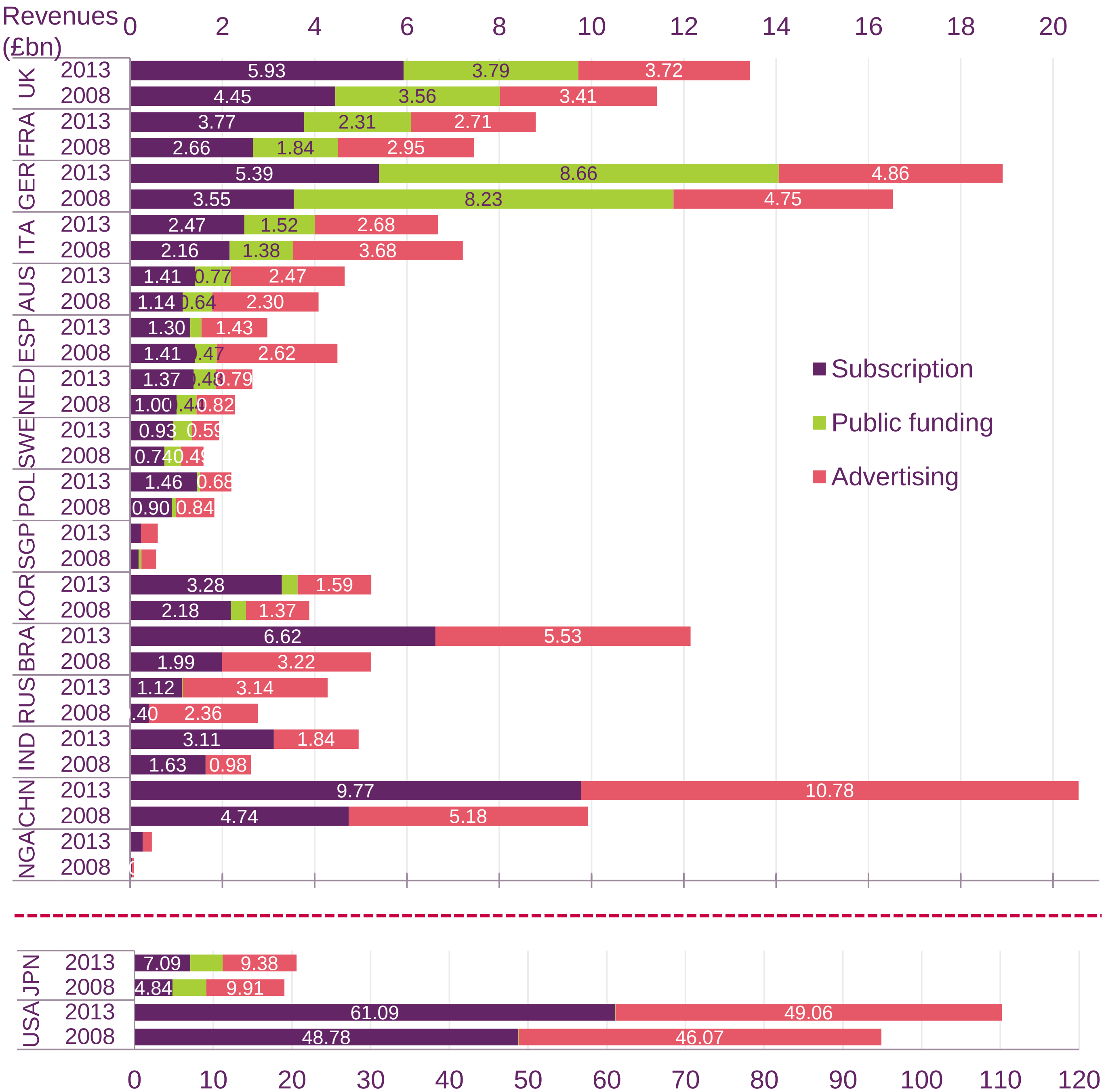
Figure 3.28

TV revenues among comparator countries by source, 2008 and 2013



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only. Different scale used for the US and Japan due to larger size of those markets.

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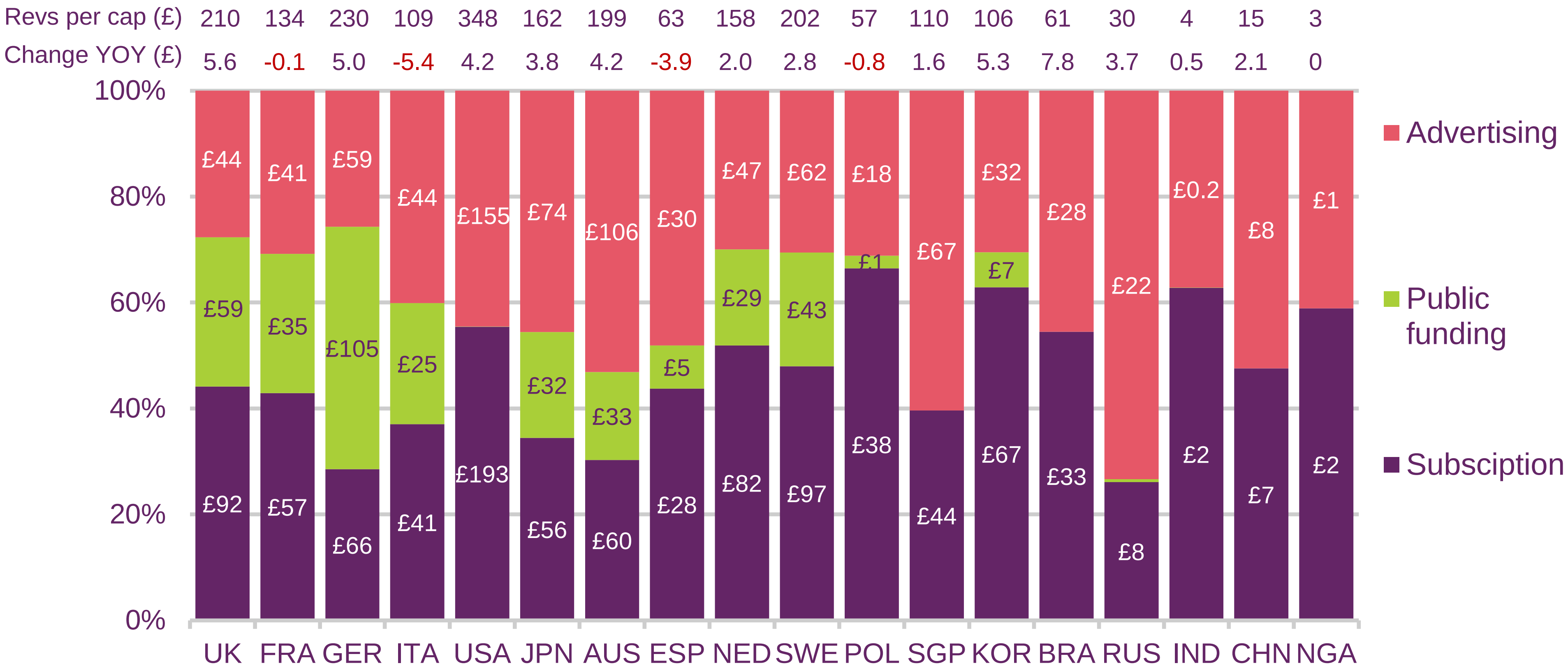
Figure 3.29

TV revenue per head, by revenue source, 2013



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only; figures inside the bars represent industry revenue per head by source.

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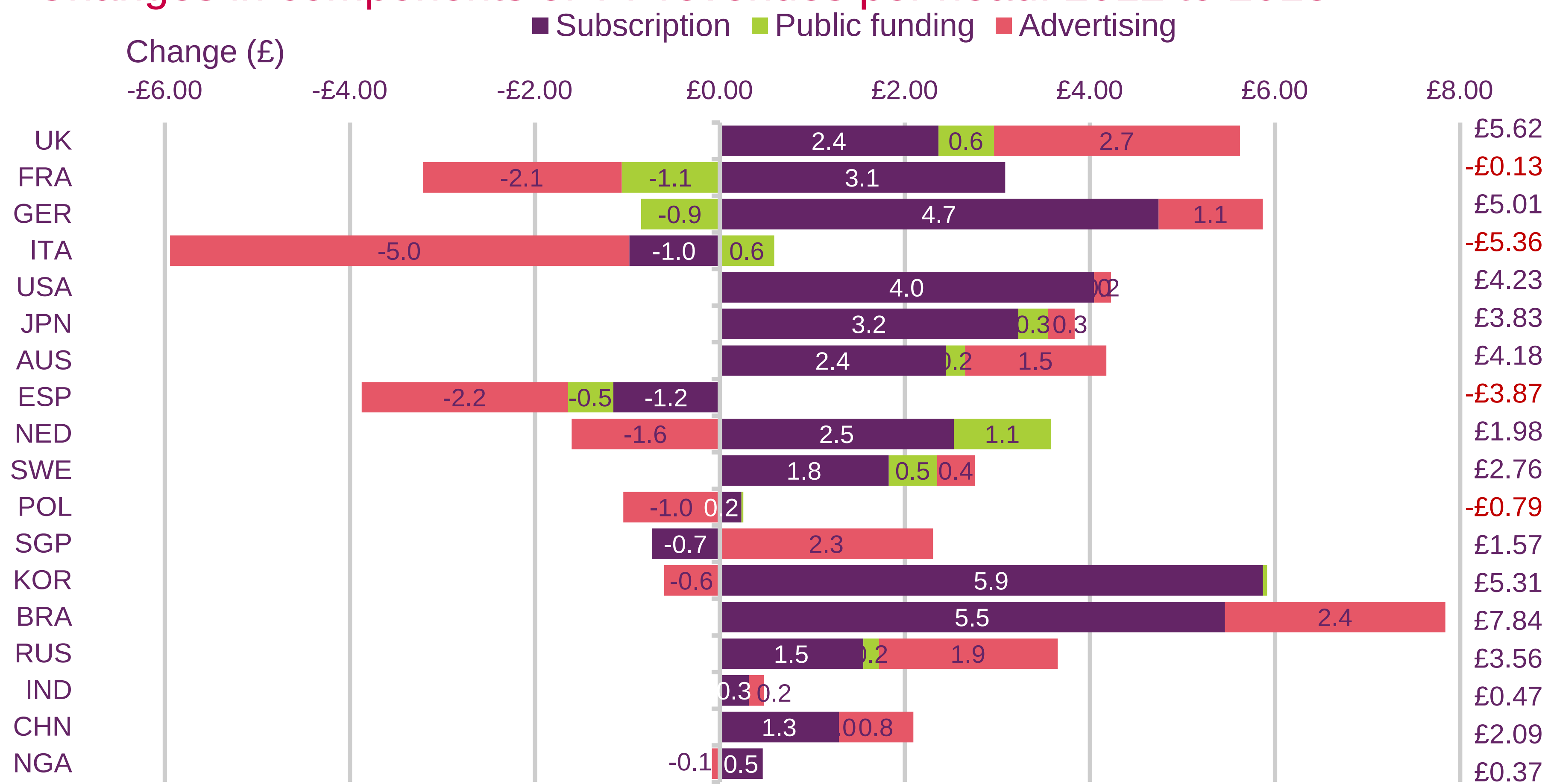
Figure 3.30

Changes in components of TV revenues per head: 2012 to 2013



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Revenues include advertising, subscriptions and sources of public funding only; the bars represent changes in industry revenue per head, by source.

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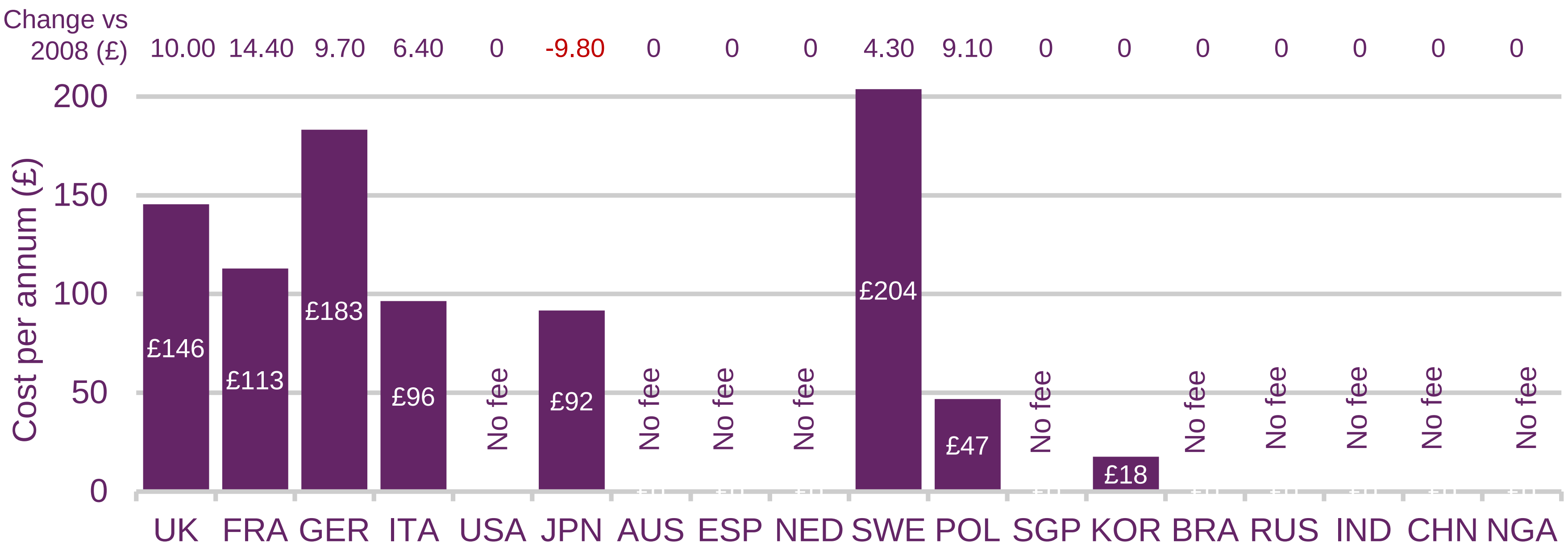
Figure 3.31

Cost of a TV licence fee, 2013



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013.

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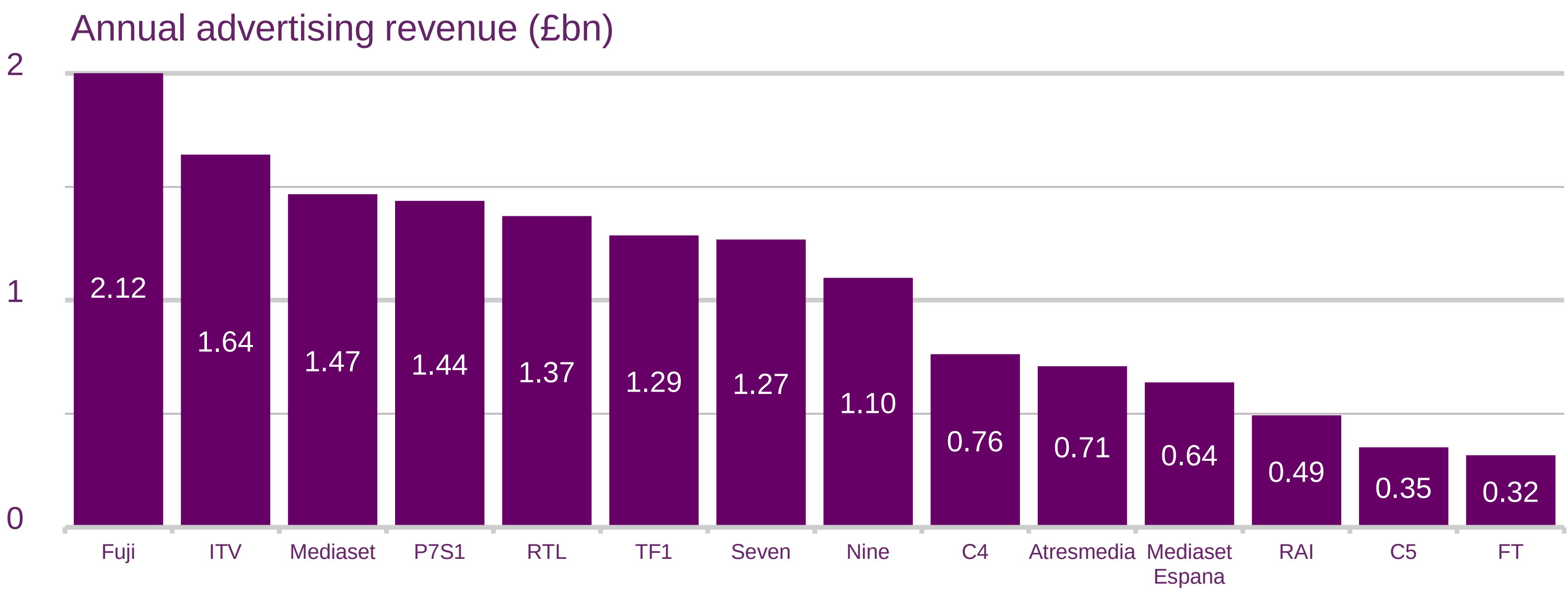
Figure 3.32

Latest reported advertising revenues for selected free-to-view TV operators, 2013



Territory	JPN	UK	ITA	GER	GER	FRA	AUS	AUS	UK	ESP	ESP	ITA	UK	FRA
YOY Change (%)	-0.2	4.7	-11.4	2.6	2.1	-5.5	0.5	6.0	-1.9	13.0	-6.8	-12.6	15.2	-10.9
5 Yr CAGR (%)	0.9	2.0	-6.9	1.4	-0.4	-2.6	2.5	4.7	-0.7	0.2	-8.7	-10.8	2.4	-9.6

Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013; Comparisons should be regarded as indicative only due to the possibility of differences in financial reporting between broadcasters.

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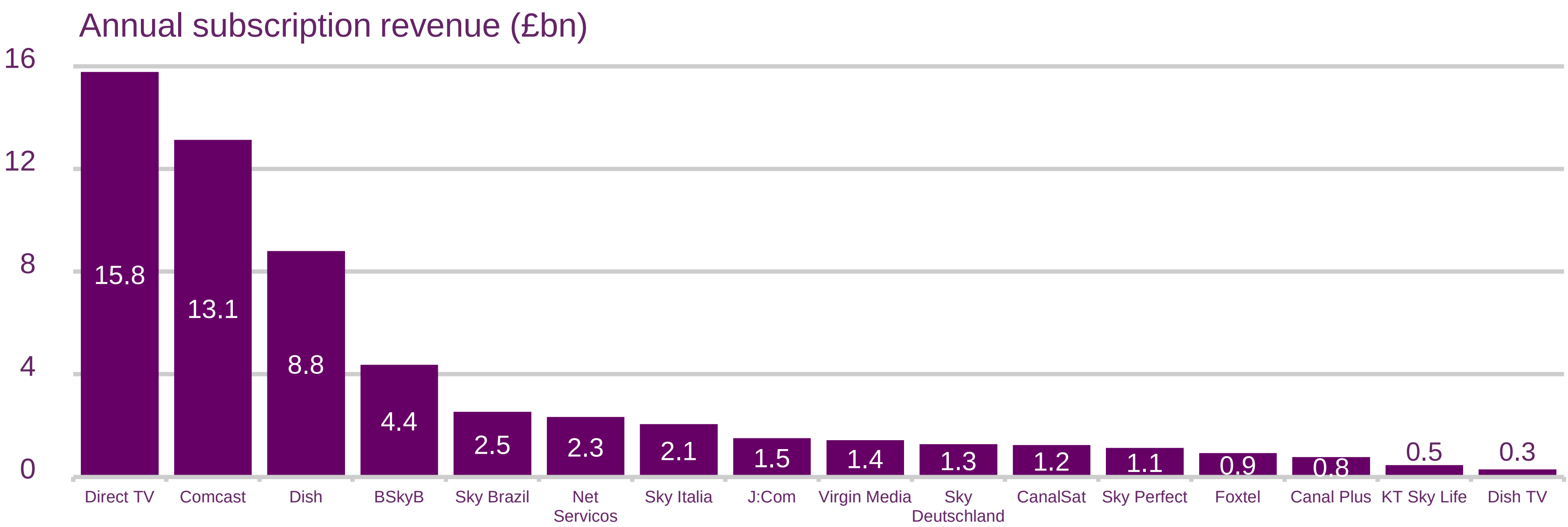
Figure 3.33

Latest reported subscription revenues for selected pay TV operators, 2013



Territory	USA	USA	USA	UK	BRA	BRA	ITA	JPN	UK	GER	FRA	JPN	AUS	ESP	KOR	IND
5 Yr CAGR (%)	7.3	1.4	3.7	4.8	29.8	20.1	0.9	7.8	9.4	17.3	2.3	0.6	21.7	-3.8	0.0	36.3
YOY Change (%)	6.2	2.9	5.5	5.1	19.7	24.0	-2.5	5.4	-1.3	15.9	-0.7	-0.6	41.4	-1.6	-0.2	53.5

Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013; Comparisons should be regarded as indicative only due to the possibility of differences in financial reporting between broadcasters.

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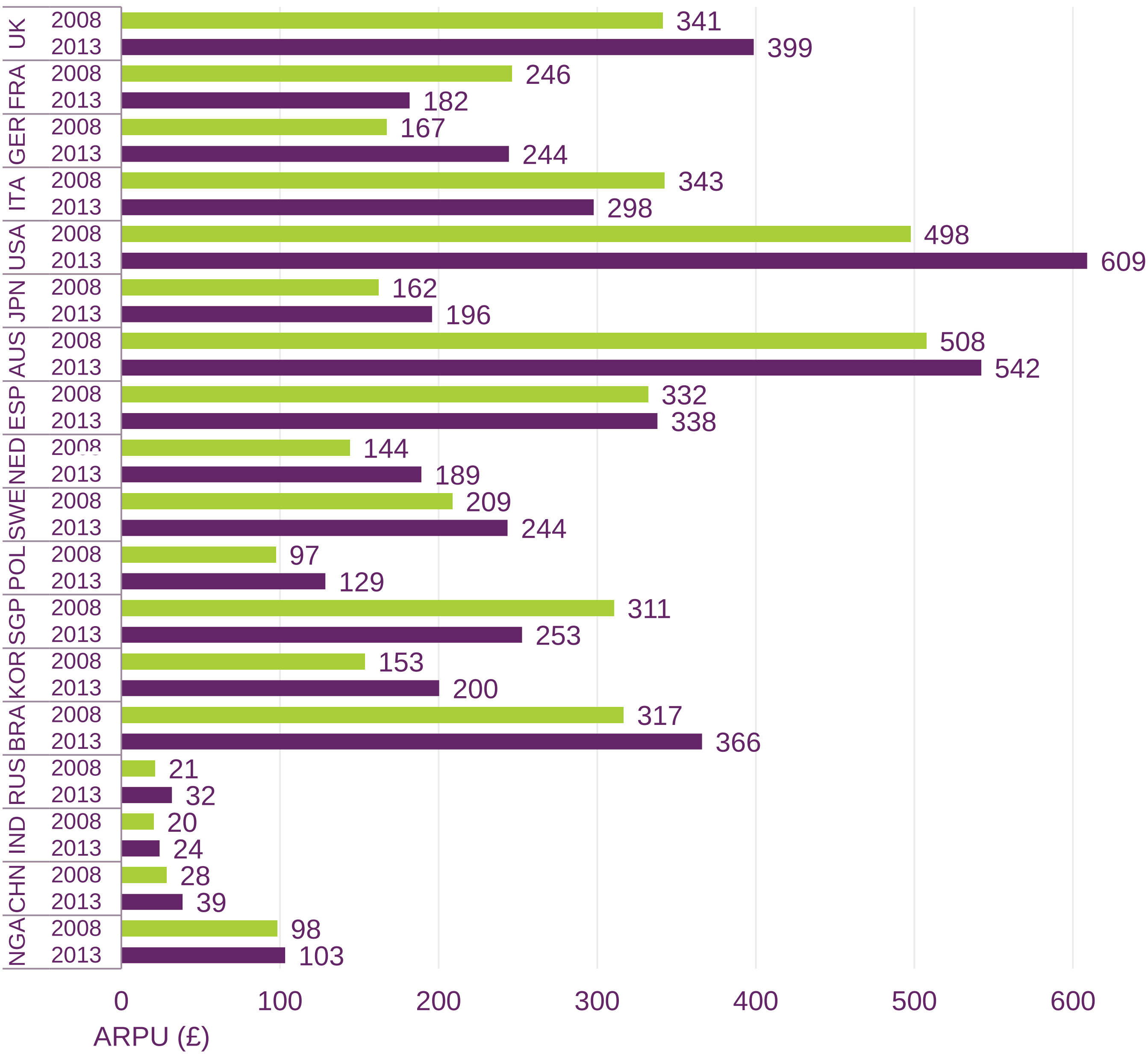
Figure 3.34

Pay-TV ARPU, by country: 2008-2013



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. ARPU is average revenue per user, representing the average revenue generated per pay TV subscriber.

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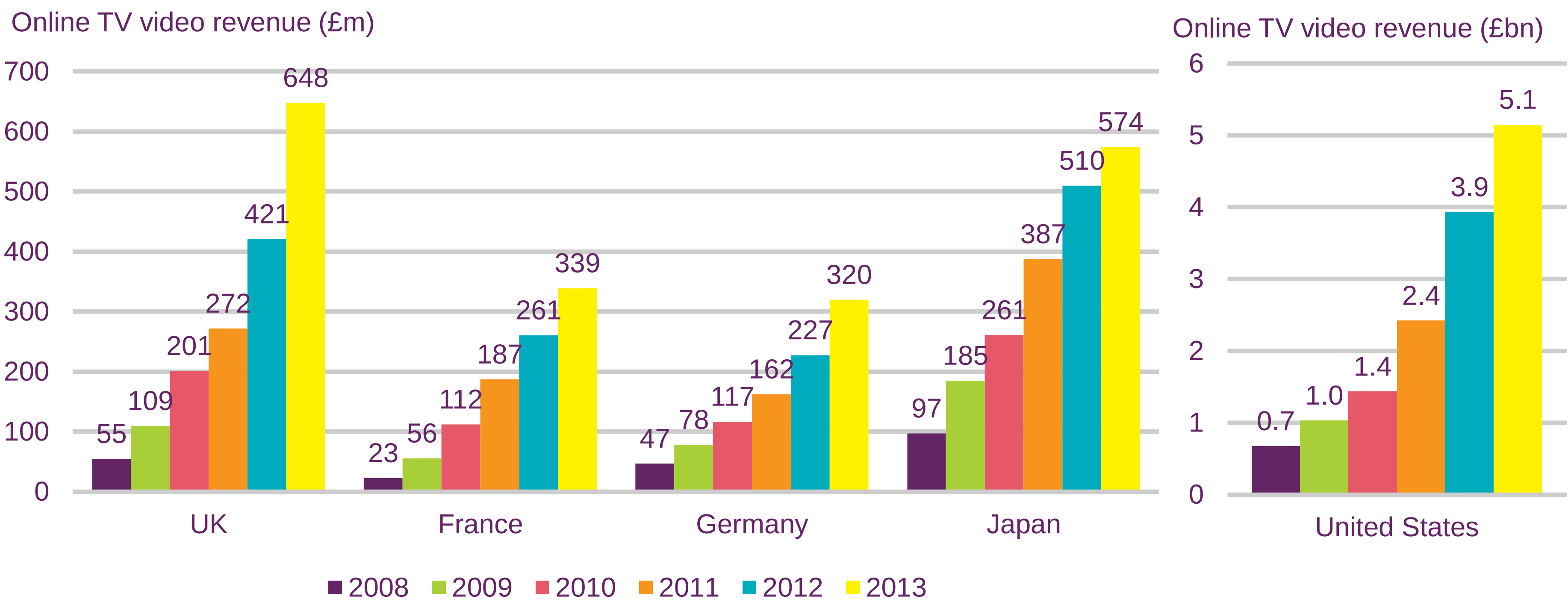
Figure 3.35

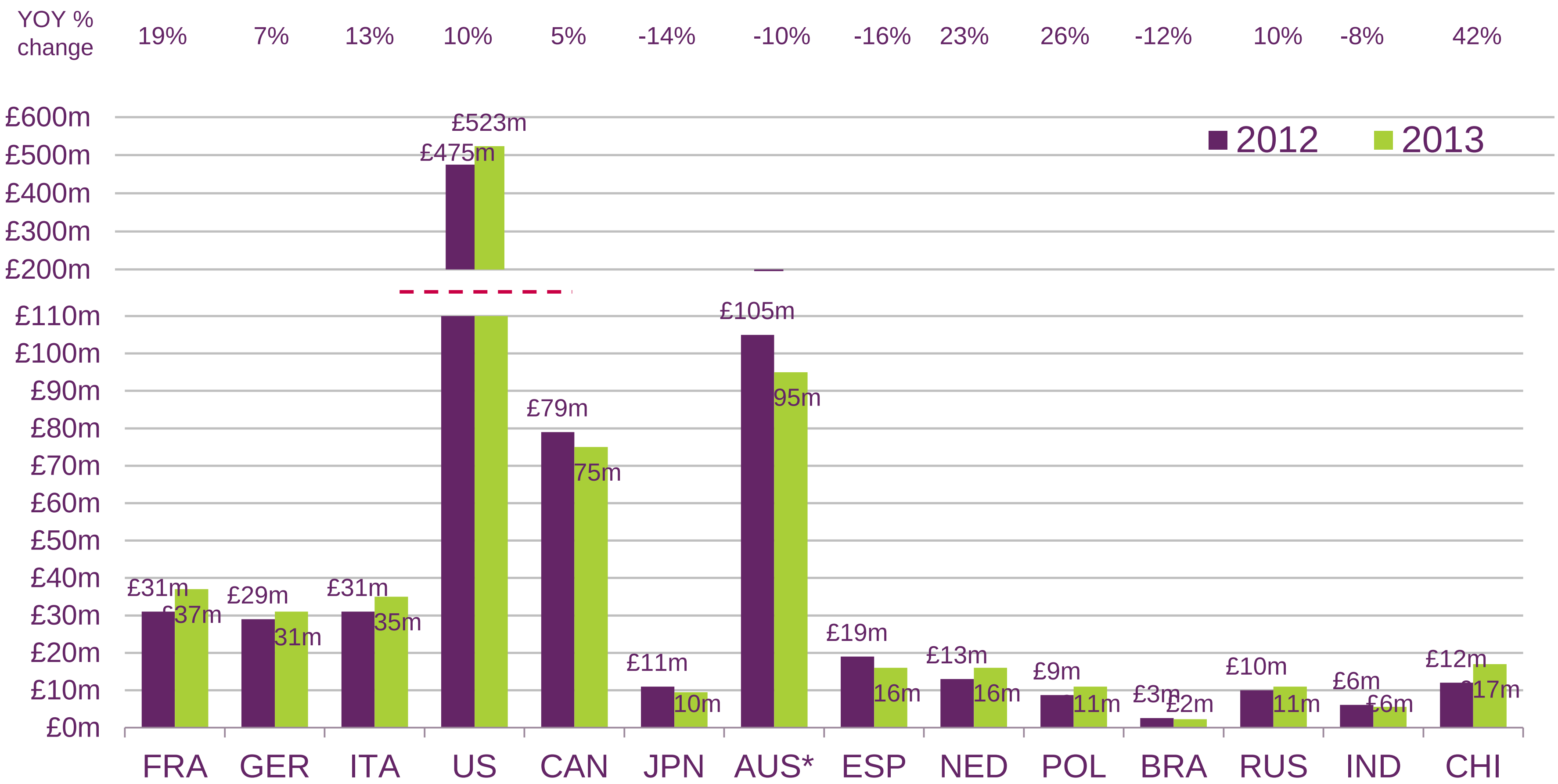
Online TV and video revenue for selected ICMR countries



Source: IHS / industry data / Ofcom. Notes: Ofcom has used an exchange rate of $1.563 to the GBP, representing the IMF average for 2013. Different scale used for USA due to larger size. "Online TV and video revenue" refers to either advertising revenue, subscription revenue as well as retail and rental on demand revenue derived from online services delivering TV and video content. Typically, it includes services such as catch-up TV services, Netflix, Xbox Video, Hulu and Hulu Plus, iTunes and YouTube amongst others.

Figure 3.36

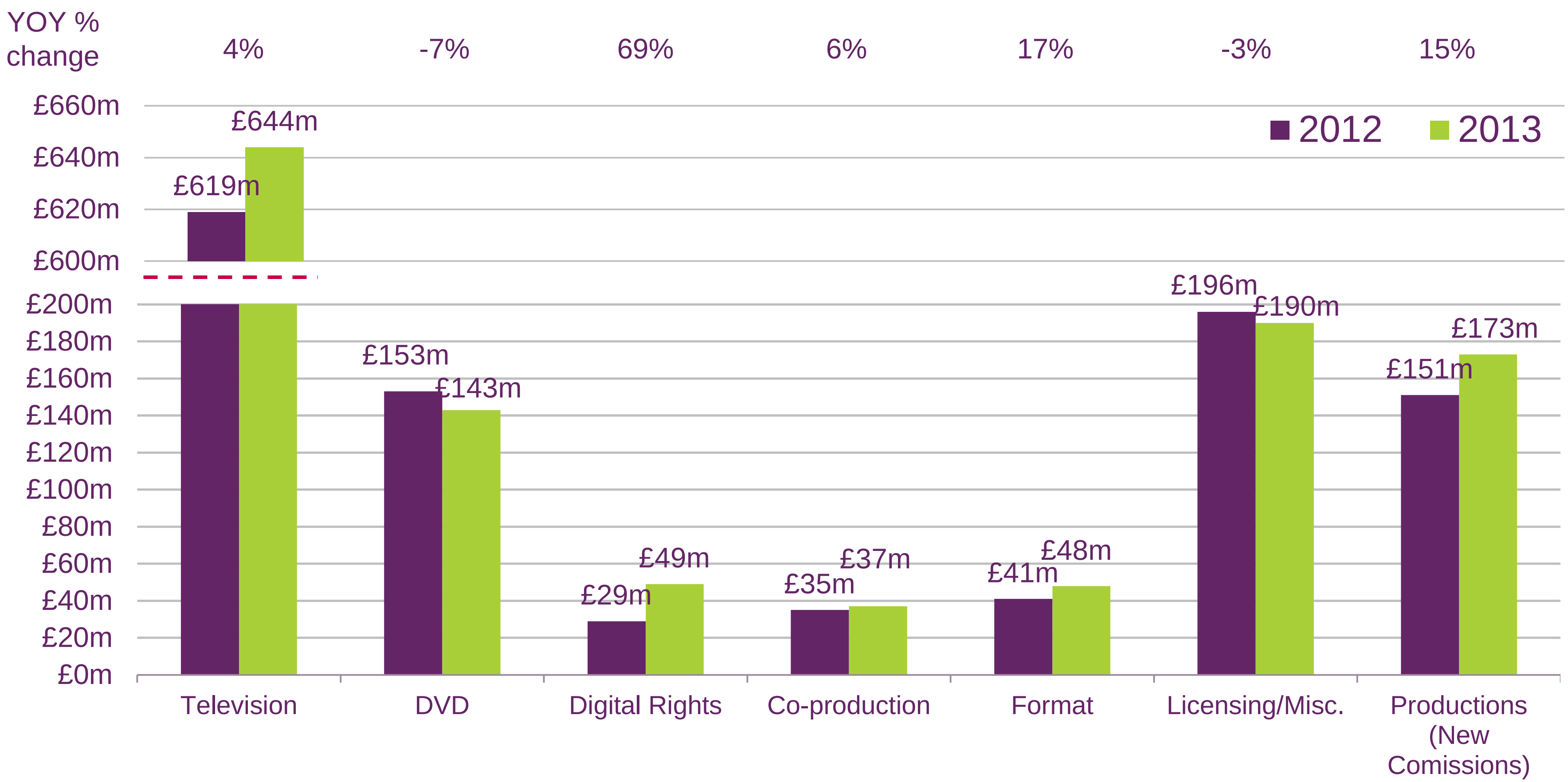
UK television industry export revenues in selected countries: 2012 and 2013



*Source: PACT. UK Television Exports Survey 2013. *Note: AUS in this section is Australasia and includes Australia, New Zealand, the island of New Guinea and neighbouring islands in the Pacific Ocean.*

Figure 3.37

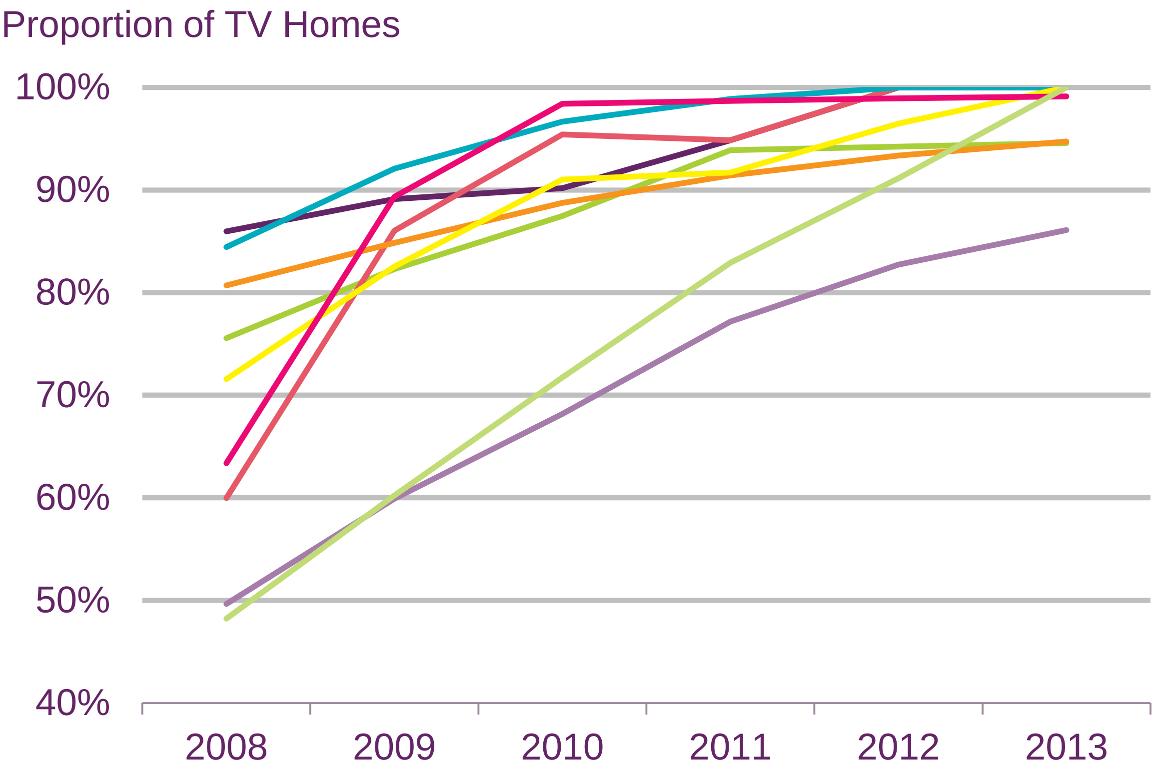
UK television industry export revenues, by type: 2012 and 2013



Source: PACT. UK Television Exports Survey 2013.

Figure 3.38

Take-up of digital television: top nine comparator countries

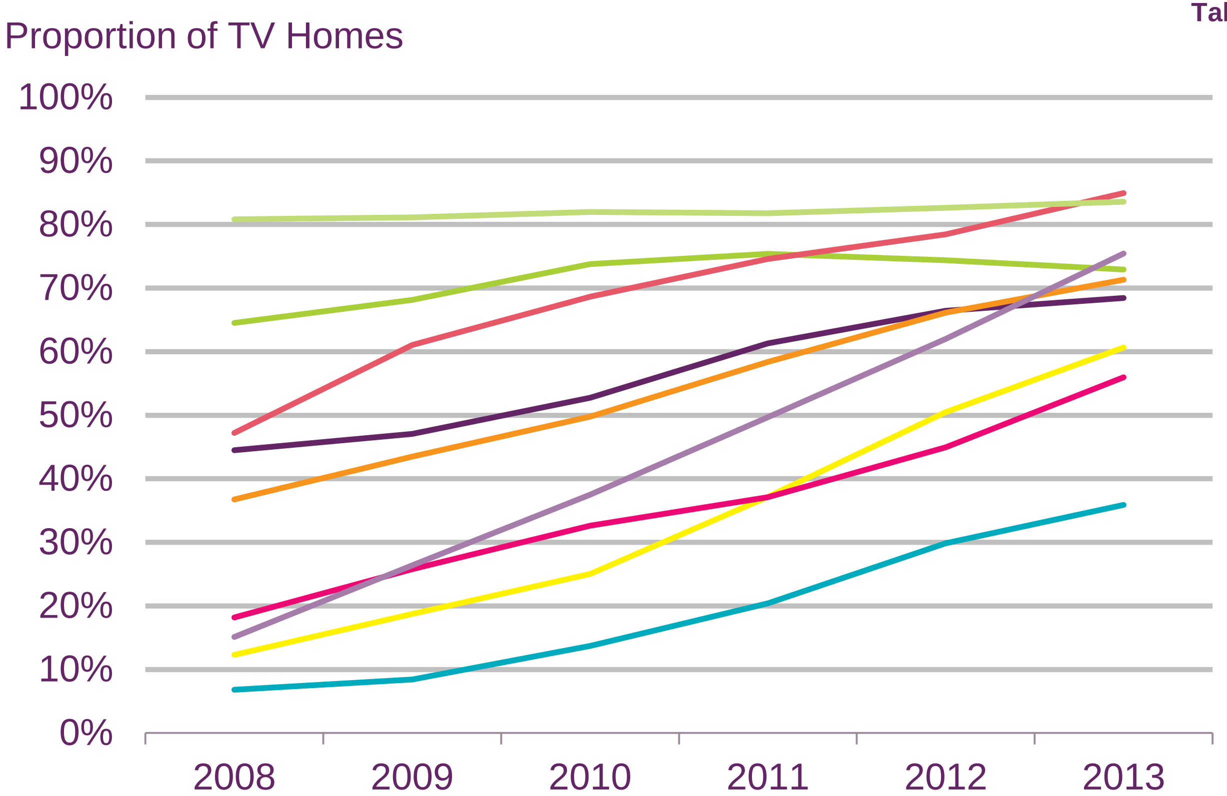


	Take-up 2013	Growth in DTT homes: 1 yr	Growth in DTT homes: 5 yr CAGR
UK	100%	1%	4%
FRA	95%	1%	6%
ITA	100%	0%	12%
USA	95%	2%	4%
JPN	100%	1%	4%
AUS	100%	5%	9%
ESP	99%	1%	11%
NED	86%	5%	12%
SGP	100%	11%	19%

Source: IHS/ industry data/ Ofcom

Figure 3.39

Take-up of digital television: the next nine comparator countries

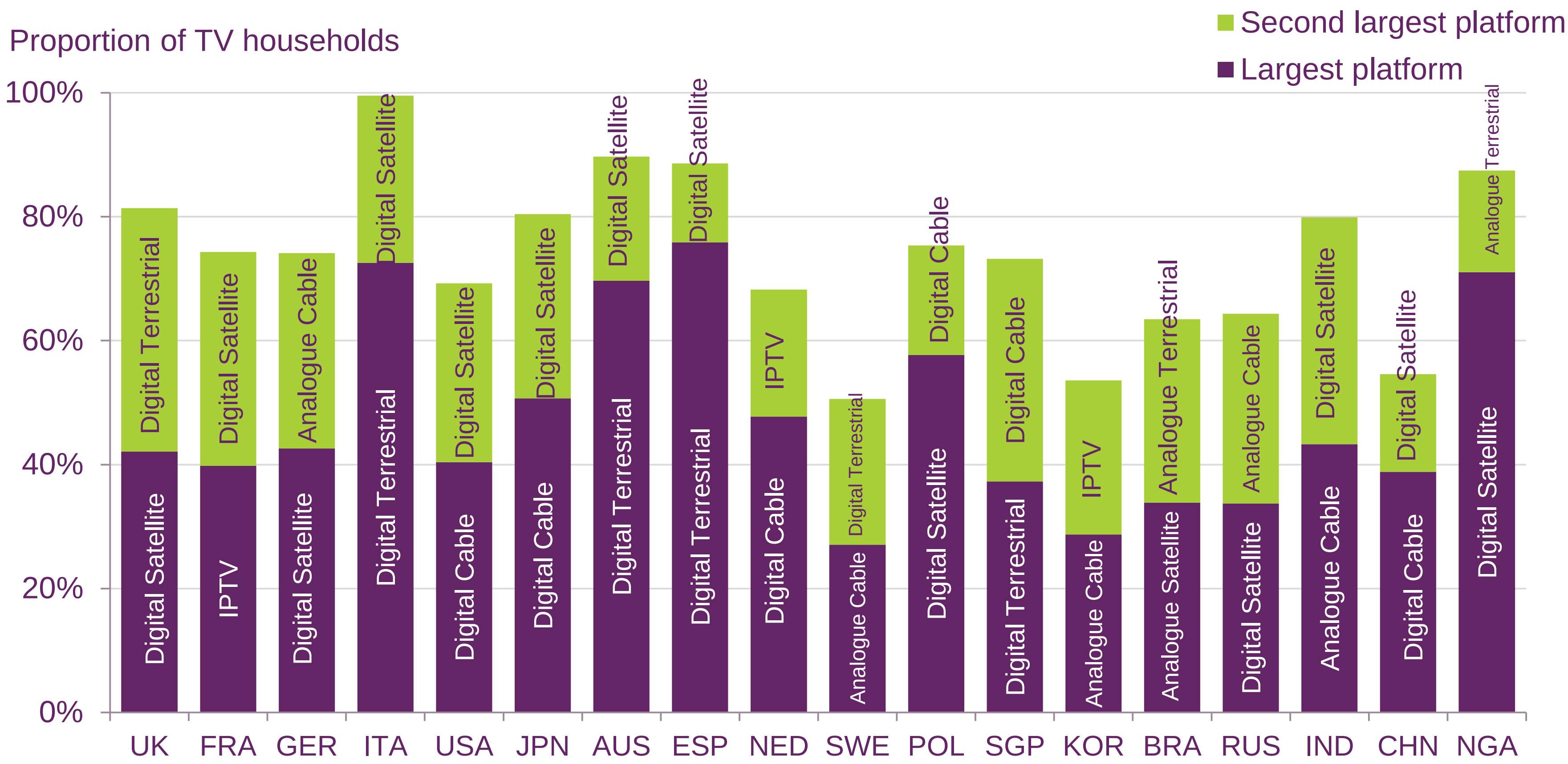


	Take-up 2013	Growth in DTT homes: 1 yr	Growth in DTT homes: 5 yr CAGR
GER	68%	3%	9%
SWE	73%	-1%	4%
POL	85%	9%	14%
KOR	71%	9%	16%
BRA	36%	22%	42%
RUS	61%	21%	39%
IND	56%	32%	33%
CHN	75%	24%	40%
NGA	84%	8%	6%

Source: IHS/ industry data/ Ofcom

Figure 3.40

Most popular TV platforms, by country, 2013



Source: IHS / industry data / Ofcom

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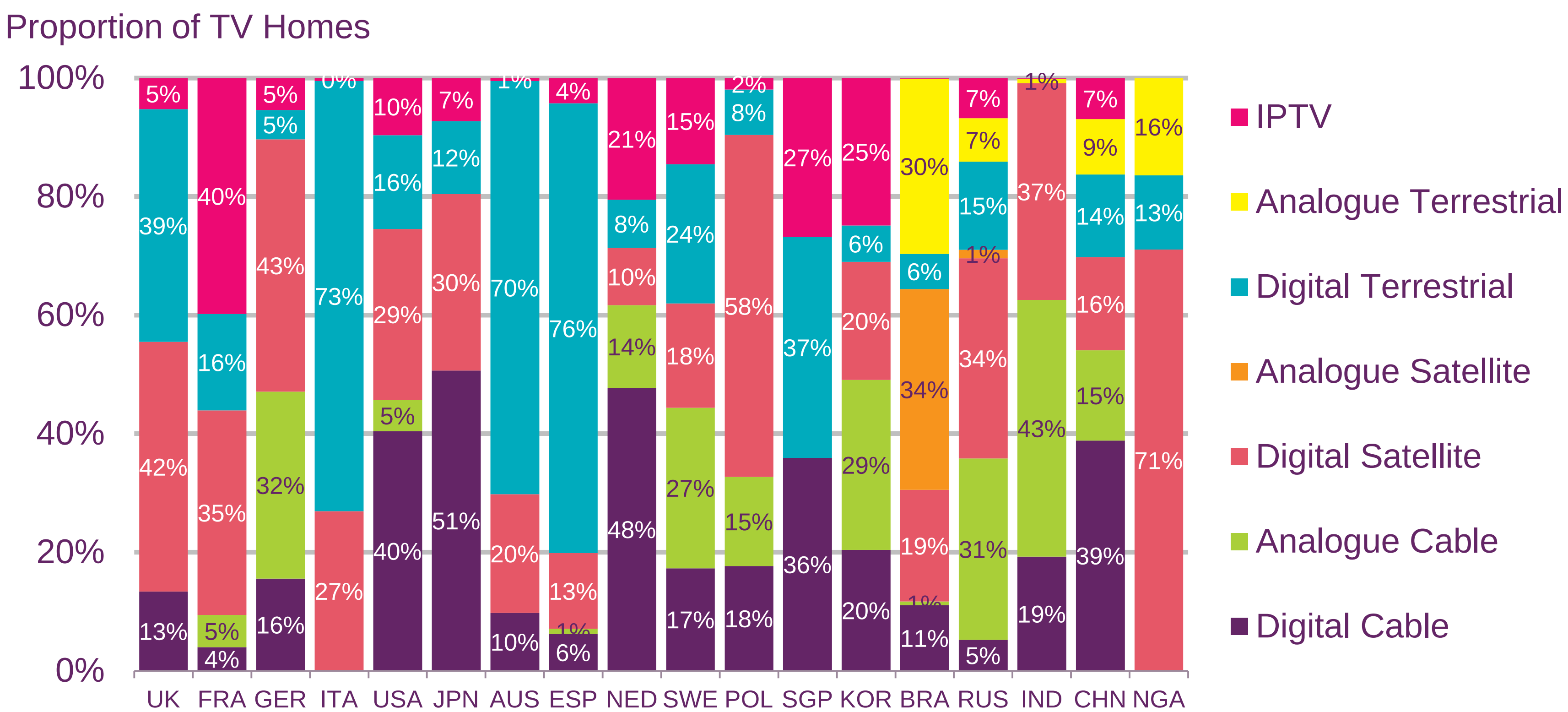
Figure 3.41

TV Platform take-up; by country



Source: IHS/Industry Data/Ofcom. Note: Digital terrestrial includes additional paid for services such as Top Up TV. Digital Satellite includes free to air services as well as paid for.

Figure 3.42

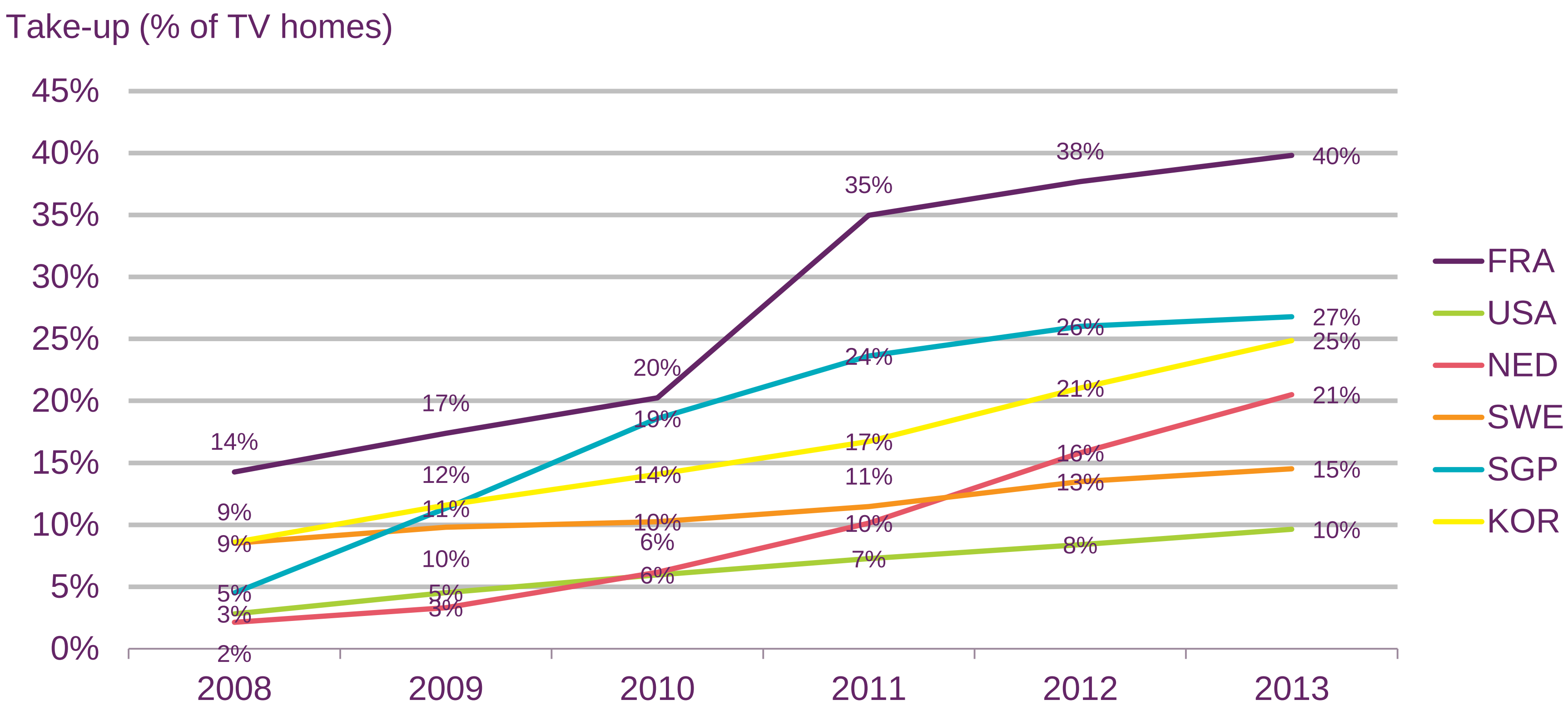
Year on year changes in platform take-up (pp) by country and technical platform

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Digital terrestrial	-4	-4	0	1	1	-1	2	2	-3	-1	5	9	-2	2	2	0	6	5
Digital satellite	1	2	1	0	0	0	1	0	0	0	-3	0	1	2	5	2	0	-3
Digital cable	-1	0	2	0	-1	0	1	-1	1	-1	5	-1	2	2	1	10	5	0
IPTV	2	2	0	-1	2	1	1	-1	5	2	0	1	4	0	2	0	2	0
Total digital	**0**	**1**	**2**	**0**	**2**	**0**	**4**	**0**	**3**	**-1**	**7**	**9**	**5**	**6**	**11**	**11**	**13**	**1**
Analogue terrestrial	0	0	0	0	0	0	-4	0	0	0	-1	-9	0	-4	-10	0	-10	-1
Analogue satellite	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Analogue cable	0	-1	-2	0	-2	0	0	0	-3	1	-6	0	-5	-1	-1	-11	-4	0
Total analogue	**0**	**-1**	**-2**	**0**	**-2**	**0**	**-4**	**0**	**-3**	**1**	**-7**	**-9**	**-5**	**-6**	**-11**	**-11**	**-13**	**-1**

Source: IHS / industry data / Ofcom

Figure 3.43

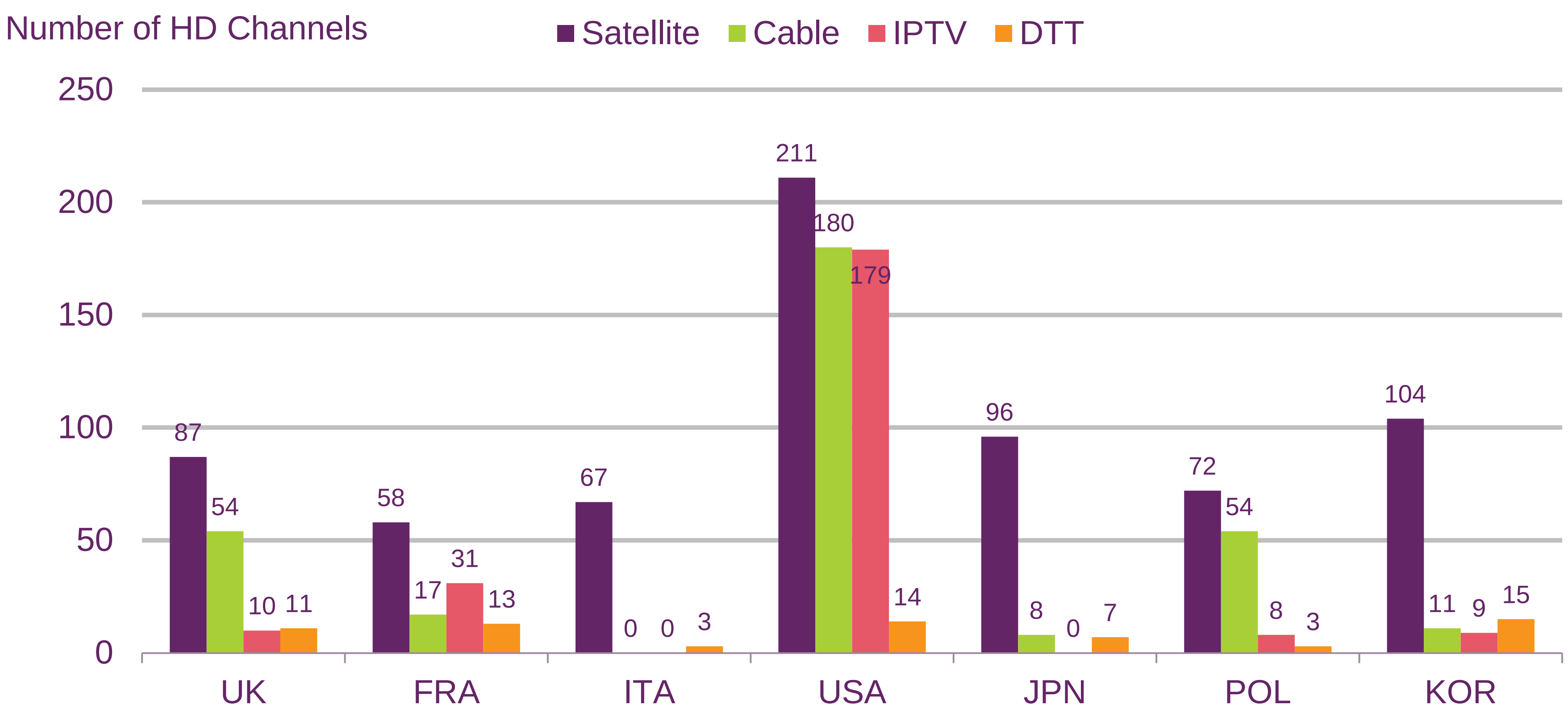
IPTV take-up on main TV sets in countries where take-up was at least 10% in 2013.



Source: IHS/ industry data/ Ofcom

Figure 3.44

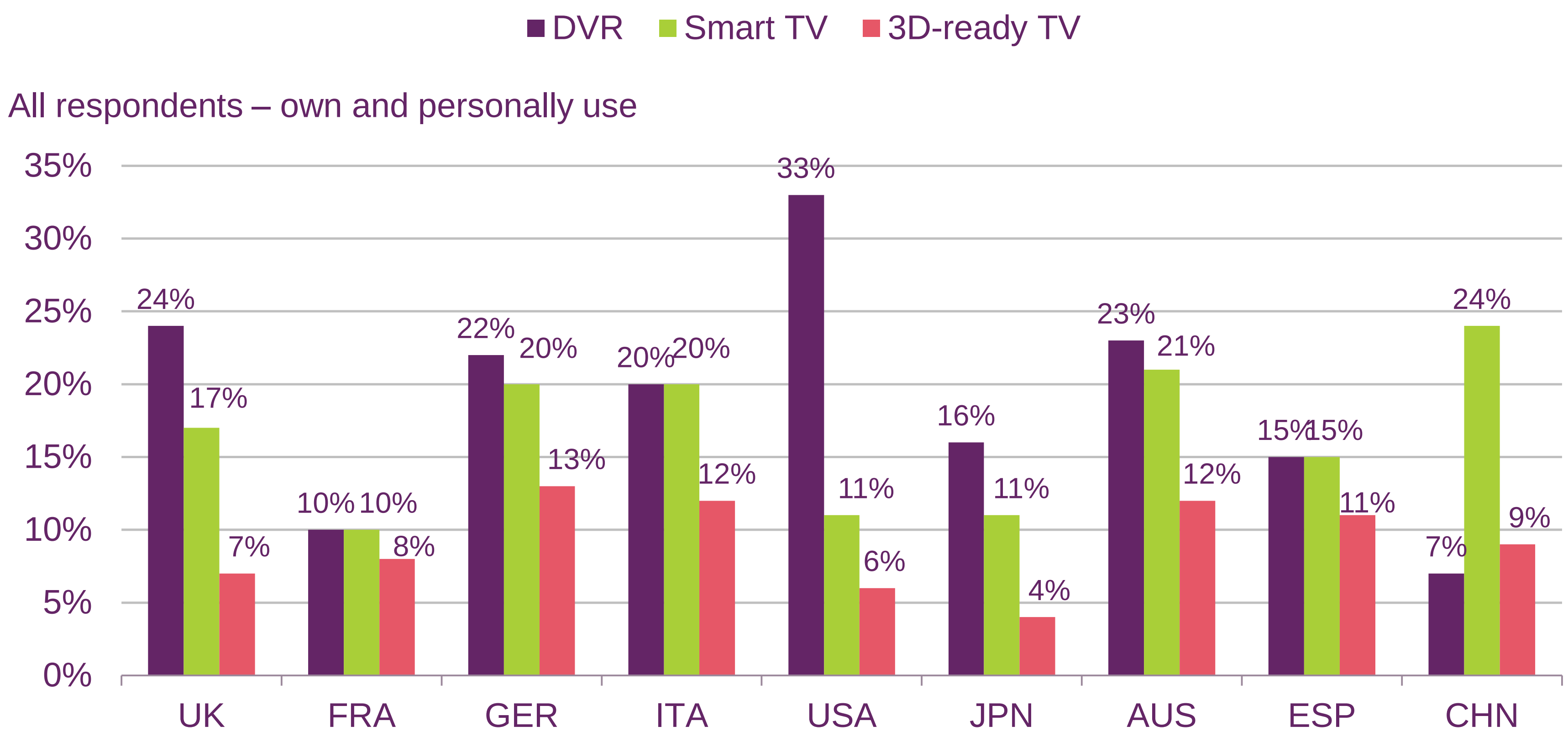
Number of HDTV Channels: 2013



Source: IHS/ industry data/ Ofcom

Figure 3.45

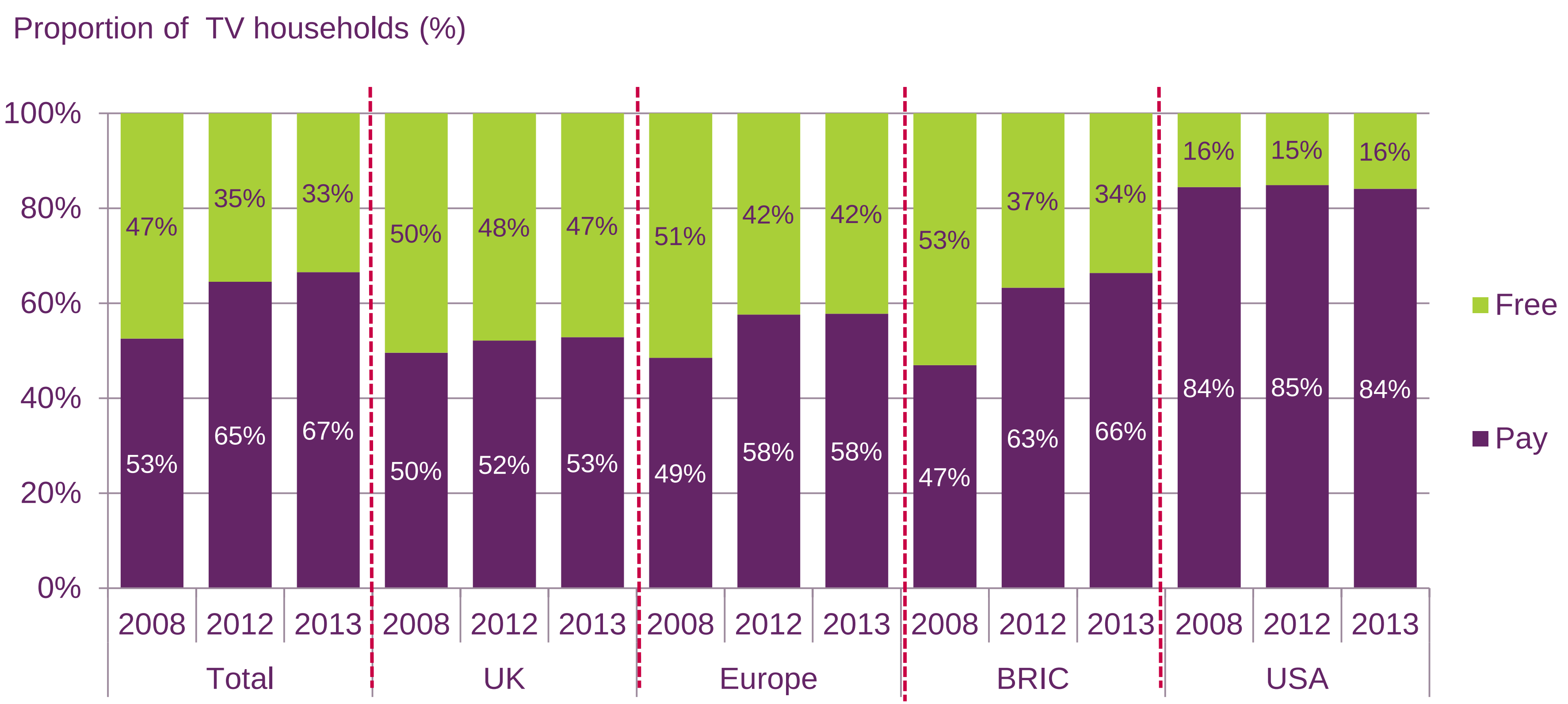
Personal use of digital video recorders, smart TVs, and 3D-ready TVs



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.
Q4a Which of the following devices do you personally use?

Figure 3.46

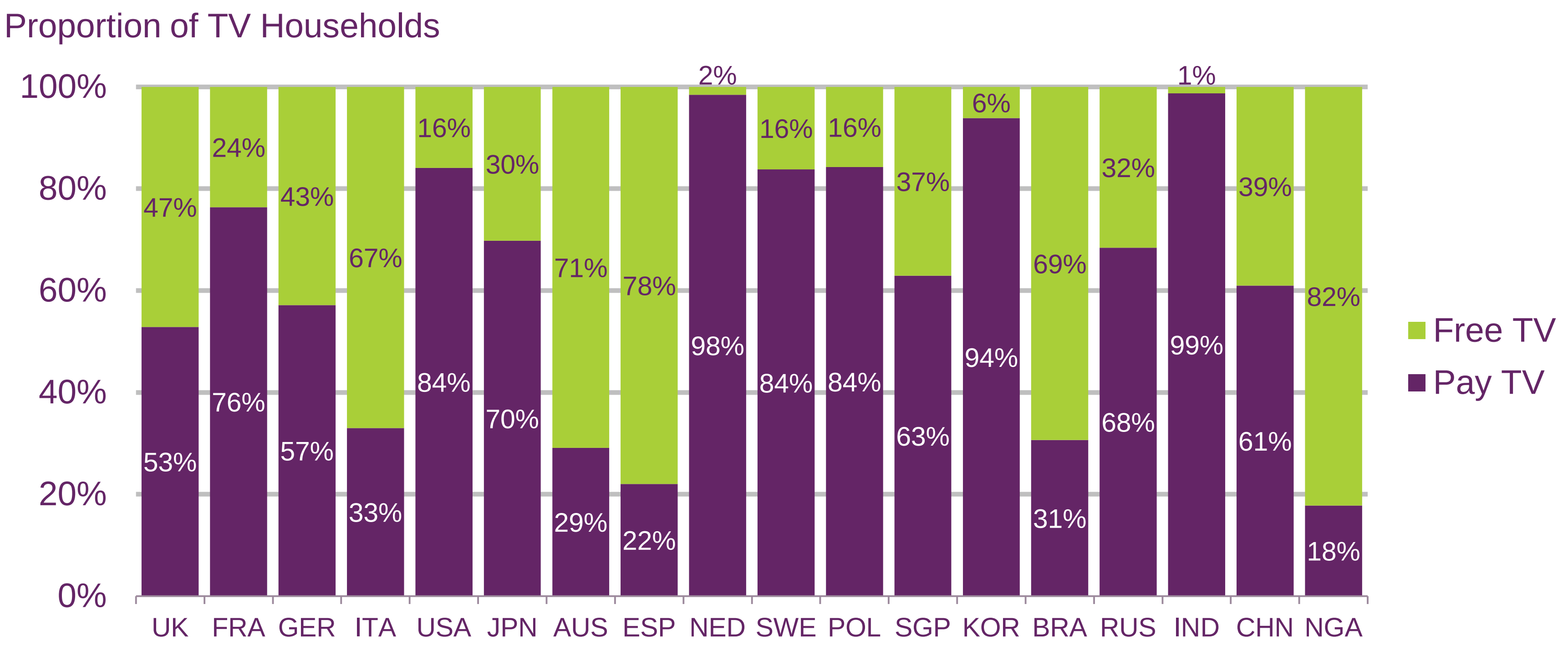
Take-up of pay television among groups of comparator countries



Source: IHS / industry data / Ofcom.Note: ‘Europe’ in this context means those European countries within our comparator set; France, Germany, Italy, Spain, Netherlands, Sweden and Poland. ‘Total’ in this context means the 18 countries in this report’s comparator set.

Figure 3.47

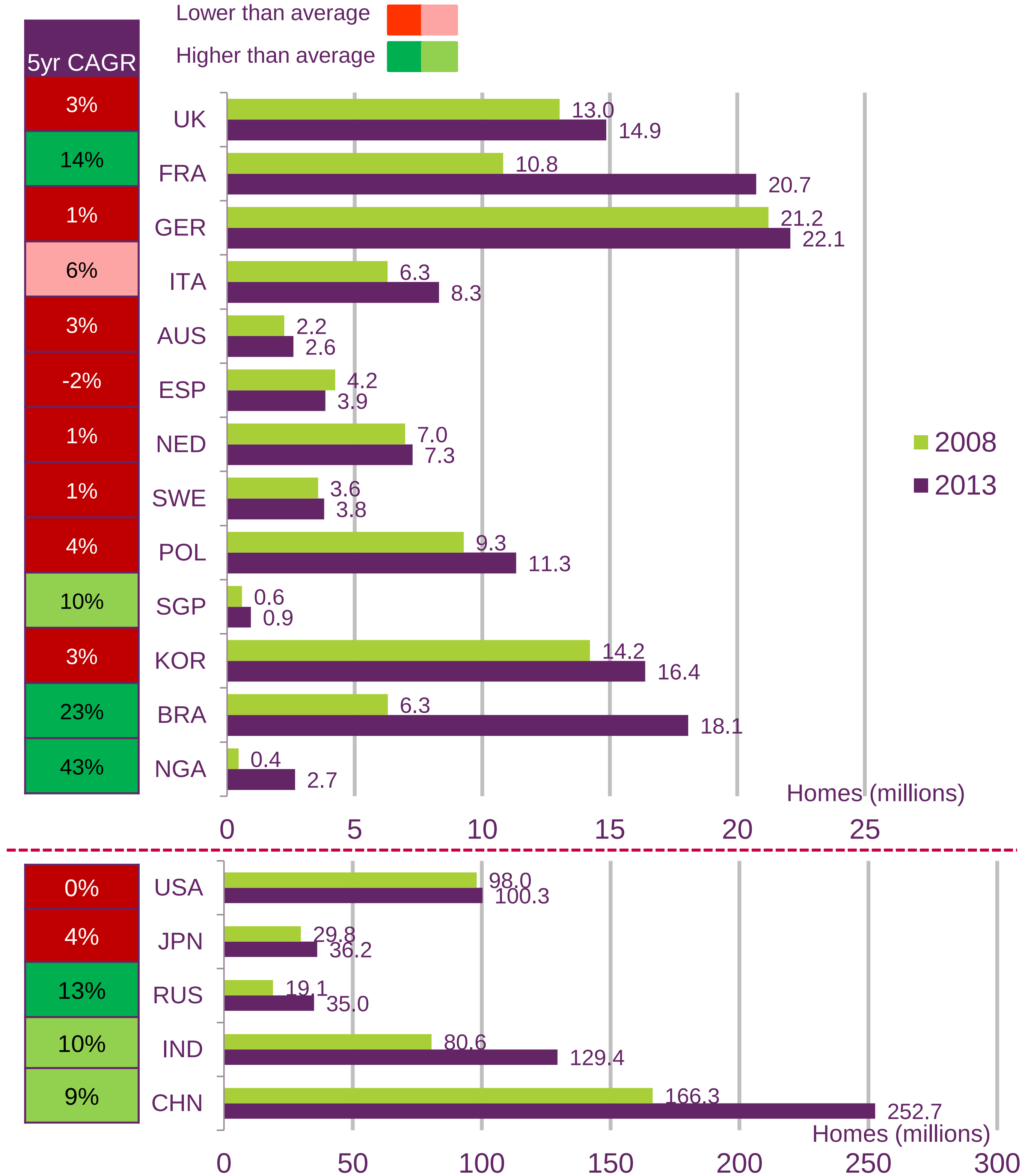
Take up of pay and free-to-air television: 2013



Source: IHS/ industry data/ Ofcom

Figure 3.48

Pay TV take up, millions of homes: 2008 and 2013



Source: IHS/ industry data/ Ofcom

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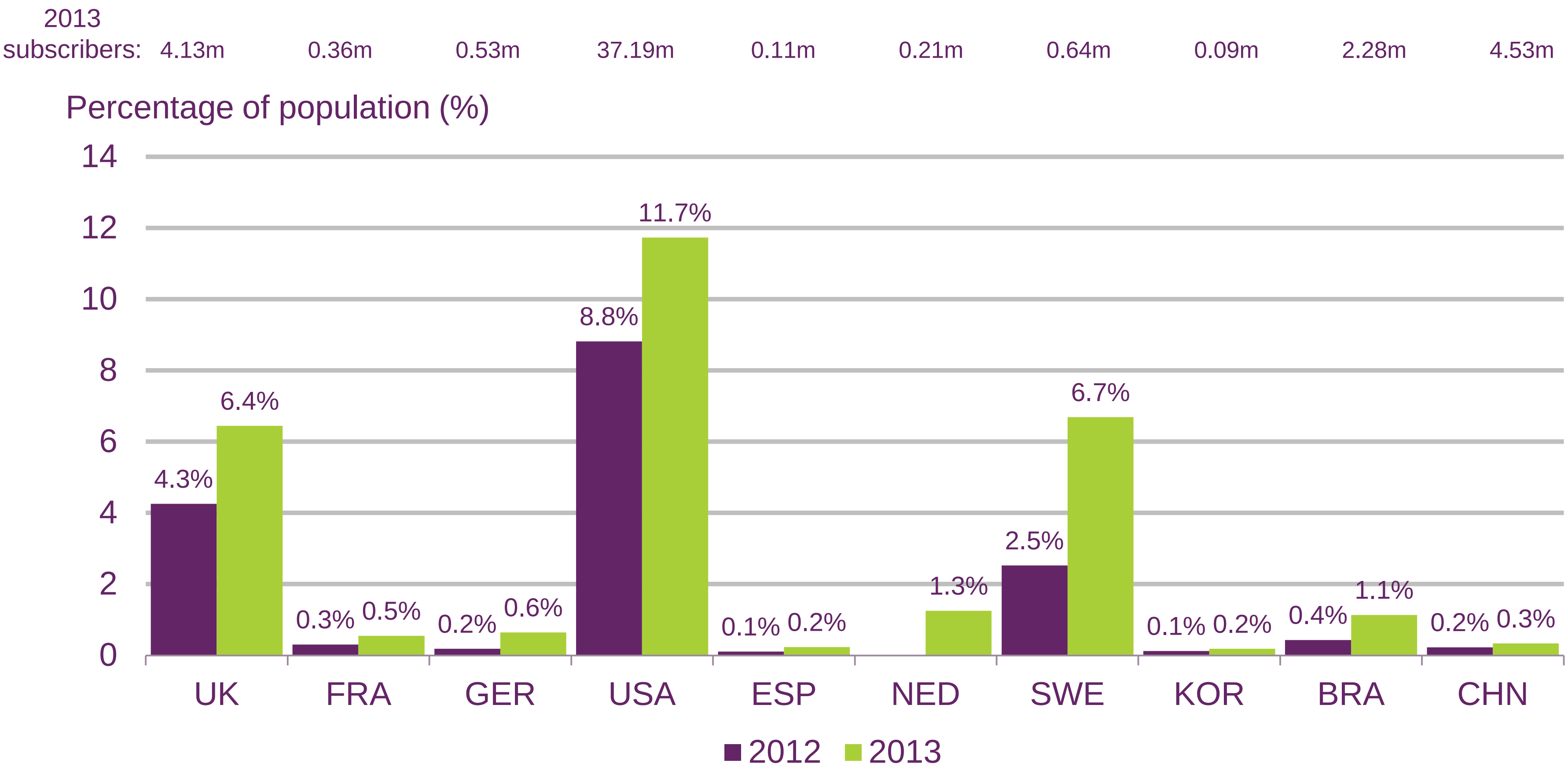
Figure 3.49

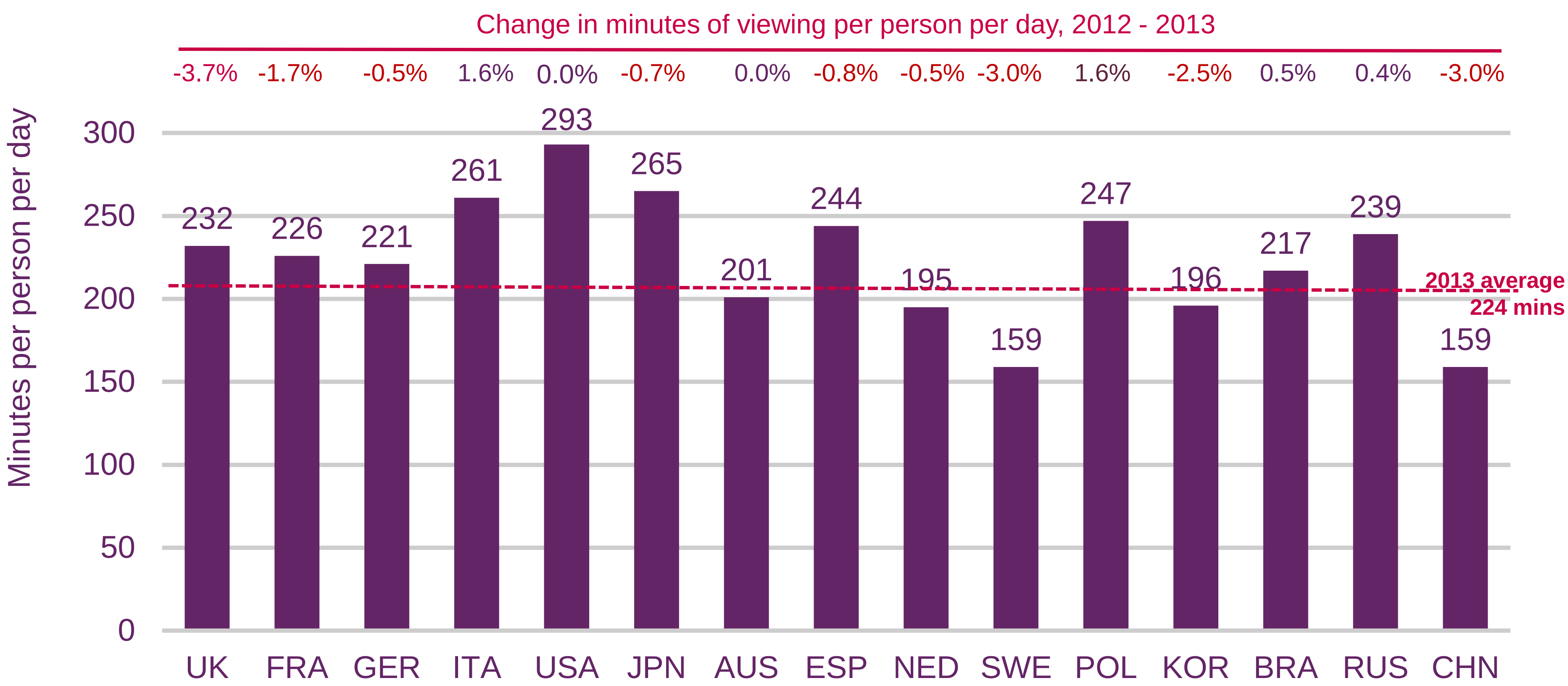
Percentage of population with subscriptions to Video on Demand services; 2012 and 2013



Source: IHS/ Industry Data/ Ofcom. Note: Italy, Japan, Poland and Russia are not charted here as their respective percentages were less than 0.1% in both years. No data was available for Australia, Singapore, India or Nigeria. Population figures come from IHS.

Figure 3.50

Daily TV viewing per head, 2012 - 2013



Source: Médiamétrie, Eurodata TV Worldwide. Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania.

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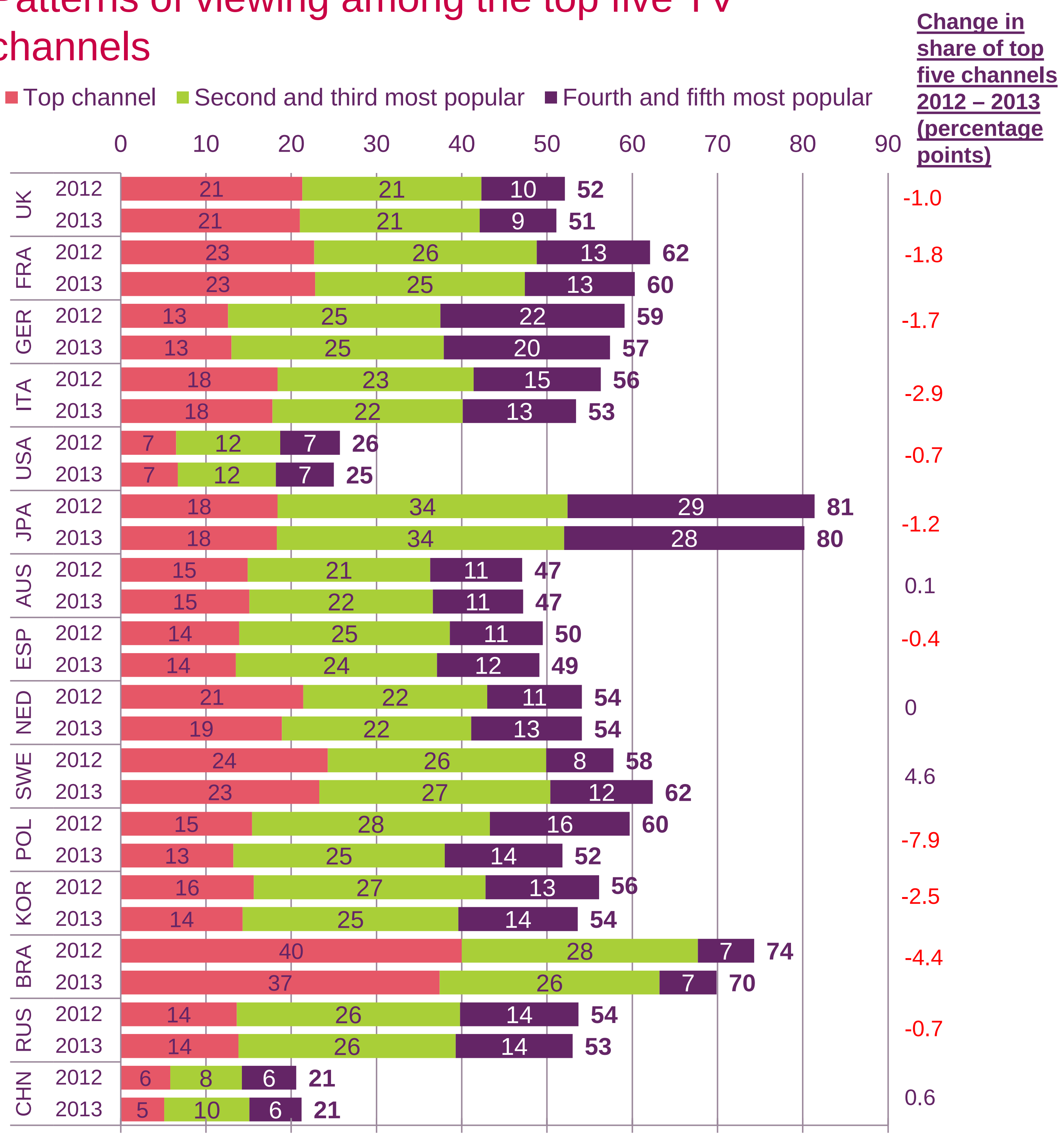
Figure 3.51

Patterns of viewing among the top five TV channels



Source: Médiamétrie, Eurodata TV Worldwide. Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania.

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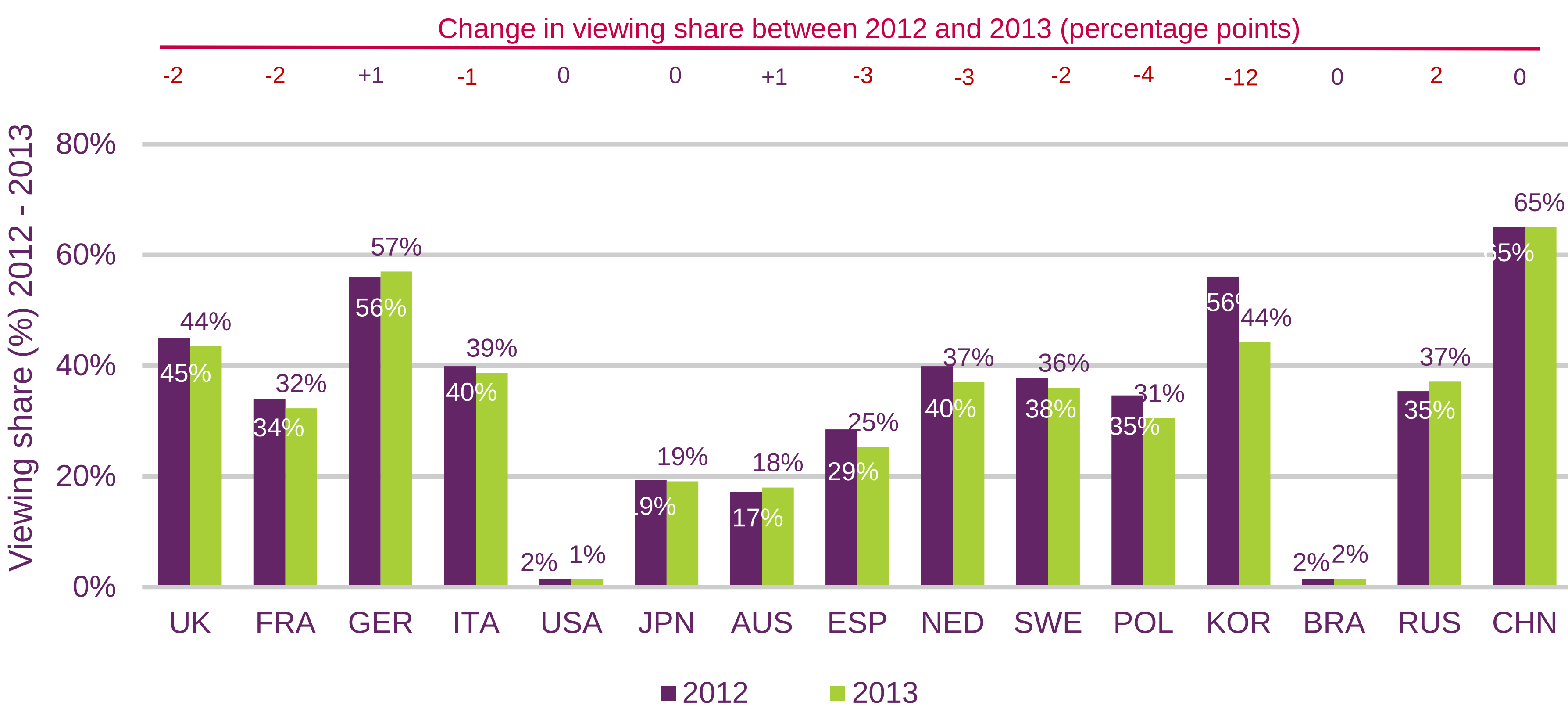
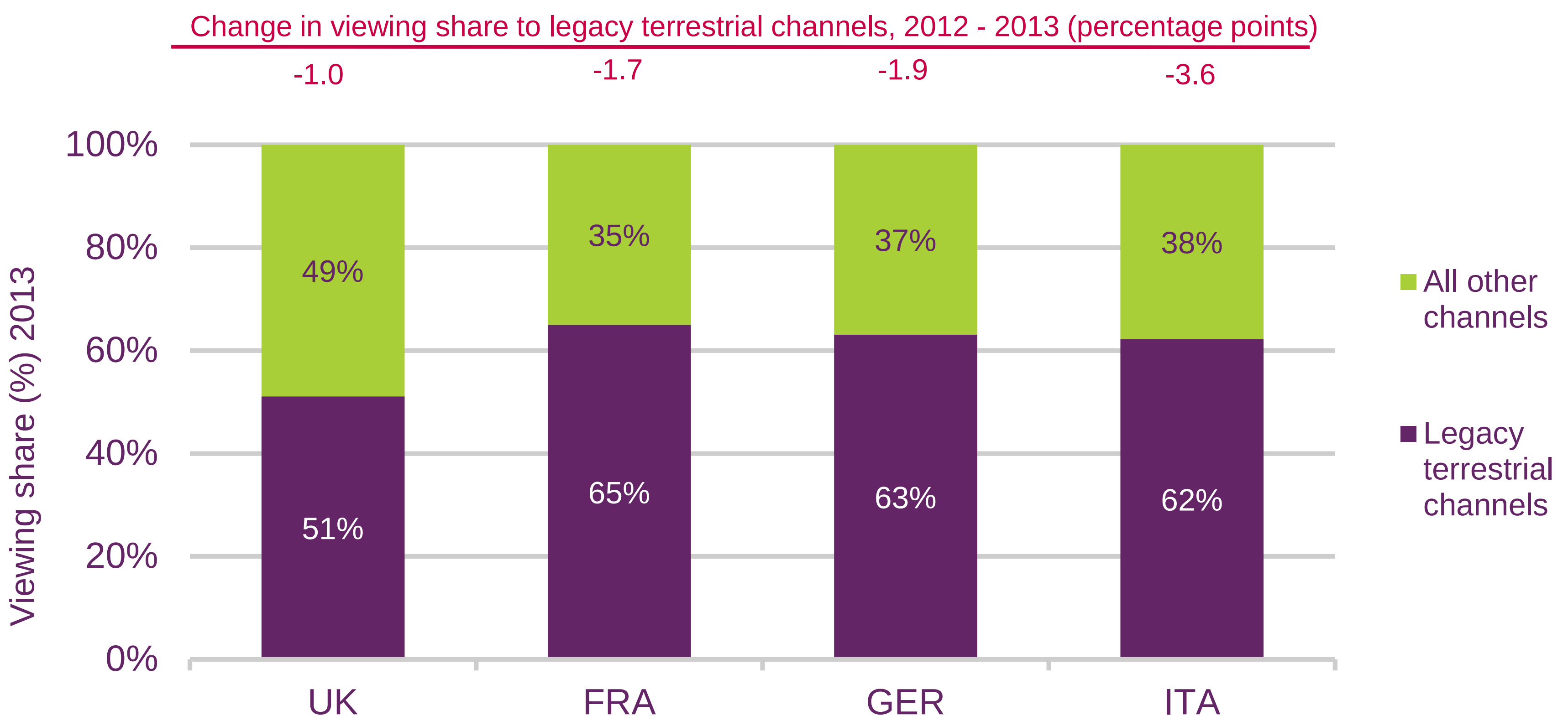
Figure 3.52
Viewing of publicly owned channels



Change in viewing share may not appear to add up with yoy 2012 to 2013 figures due to rounding of decimal places.
Source: Médiamétrie, Eurodata TV Worldwide. Uses the 'Status' flag attributed to each channel by country which relates to state ownership. Includes *Domestic public*, *Foreign public*, *Public* and *Mixed*. *Domestic public* refers to channels that broadcast locally and are state-owned. *Foreign public* refers to international public channels. *Public* refers to channels that are difficult to label between *'Domestic public'* and *'Foreign public'*, such as BBC America. *Mixed* refers to channels with a hybrid status (mix of public and private funding). Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania.

Figure 3.53
Legacy terrestrial versus all other channels share



Source: Médiamétrie, Eurodata TV Worldwide. Legacy terrestrial channels are based on MediaMetrie's definition of channels considered to be 'historical leaders' .
UK=BBC One, BBC Two, ITV, Channel 4, Channel 5 (inc HD variants, exc +1s)
Germany = ARD1, ARD3, ZDF, RTL, Sat1, Pro7
France = TF1, France2, France3, M6, France5, Arte, Canal+
Italy= Rai Uno, Canale5, Italia 1, Rai Due, Rai Tre, Rete4, La Sette (La7)

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4 – Radio and audio

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Figure 4.1

Key radio metrics: 2013

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Total industry revenue (£bn)	1.2	1.1	2.9	0.4	12.8	0.8	0.7	0.4	0.3	0.1	0.1	0.1	0.1	0.4	0.3	0.2	1.3	0.1
Revenue change (%, YOY)	-2.1	+1.7	0.0	-1.6	+2.8	-4.5	+3.5	-6.7	-5.4	+5.4	-0.7	+4.7	+0.7	+3.1	+15.2	+12.9	+8.6	+4.0
Revenues per capita (£)	18.2	16.8	35.7	6.7	40.4	6.5	29.6	7.6	15.5	12.5	2.8	16.8	3.0	1.8	2.4	0.2	0.9	0.3
% income from public licence fees	61.1	38.8	79.0	21.5	N/A	5.0	N/A	N/A	33.4	40.7	7.2	N/A	22.2	N/A	N/A	N/A	N/A	N/A

Source: Ofcom, PricewaterhouseCoopers. All figures are nominal

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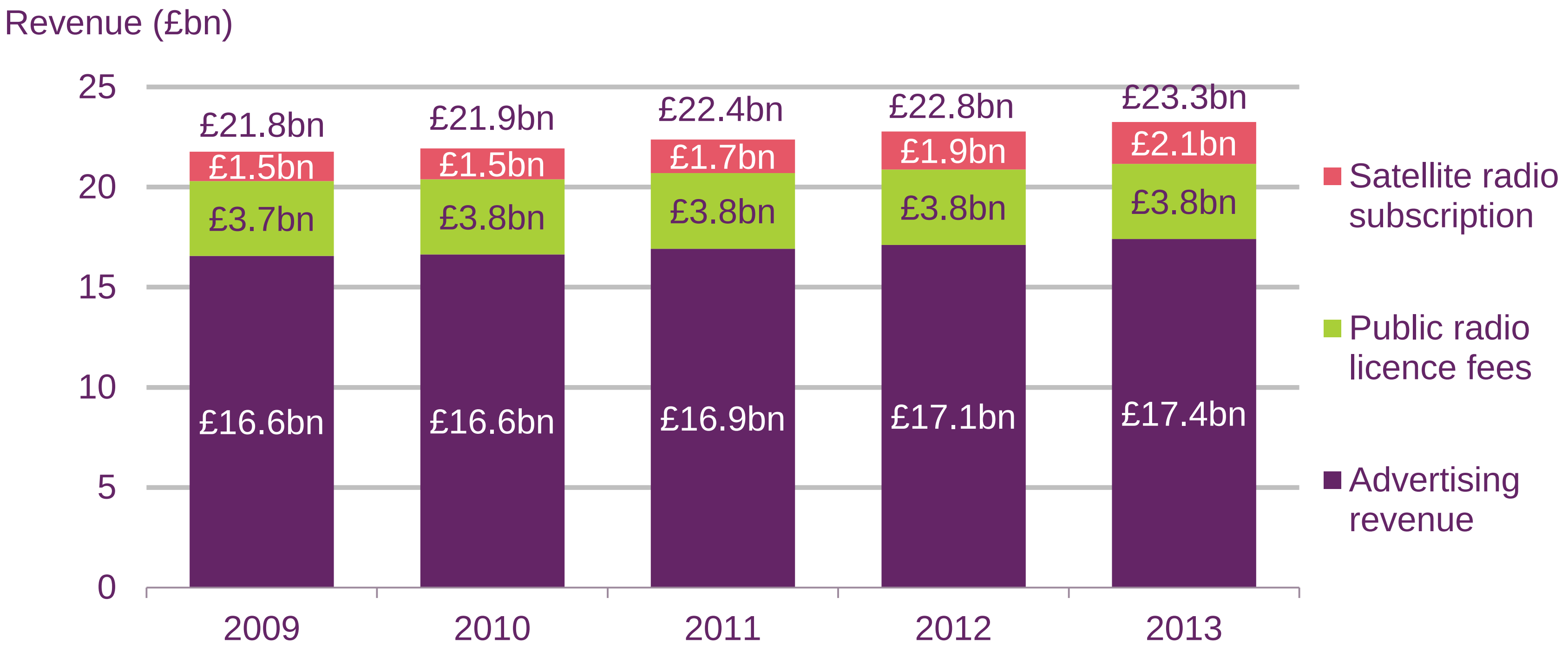
Figure 4.2

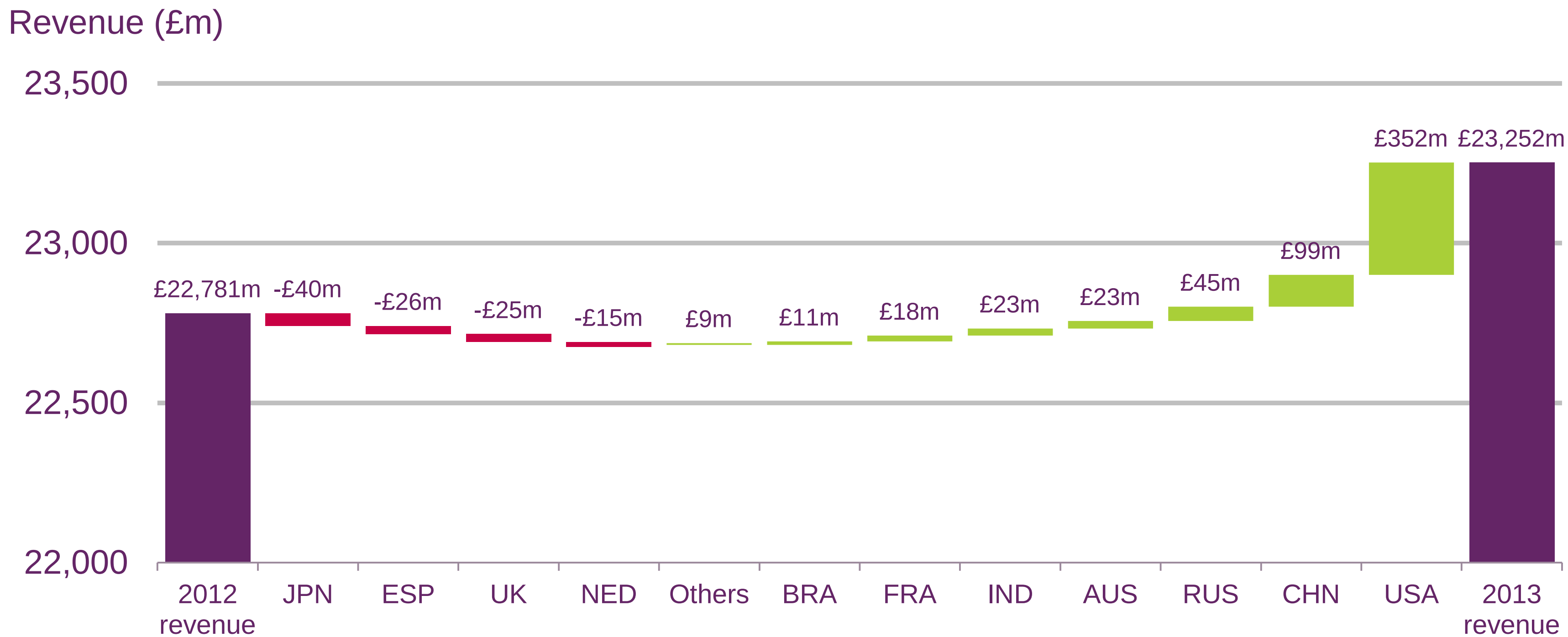
Total radio revenues for the 18 comparator countries



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.3

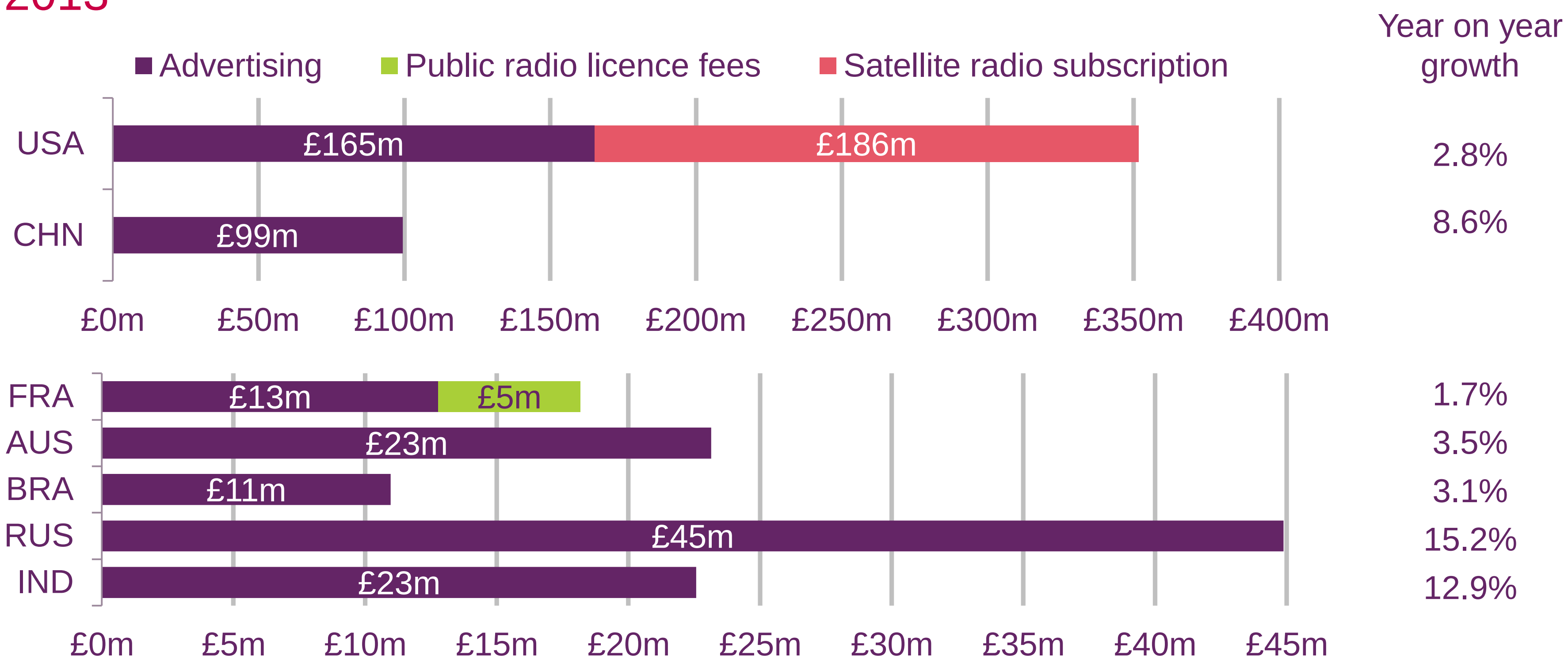
Changes in radio revenue, by country: 2012 and 2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.4

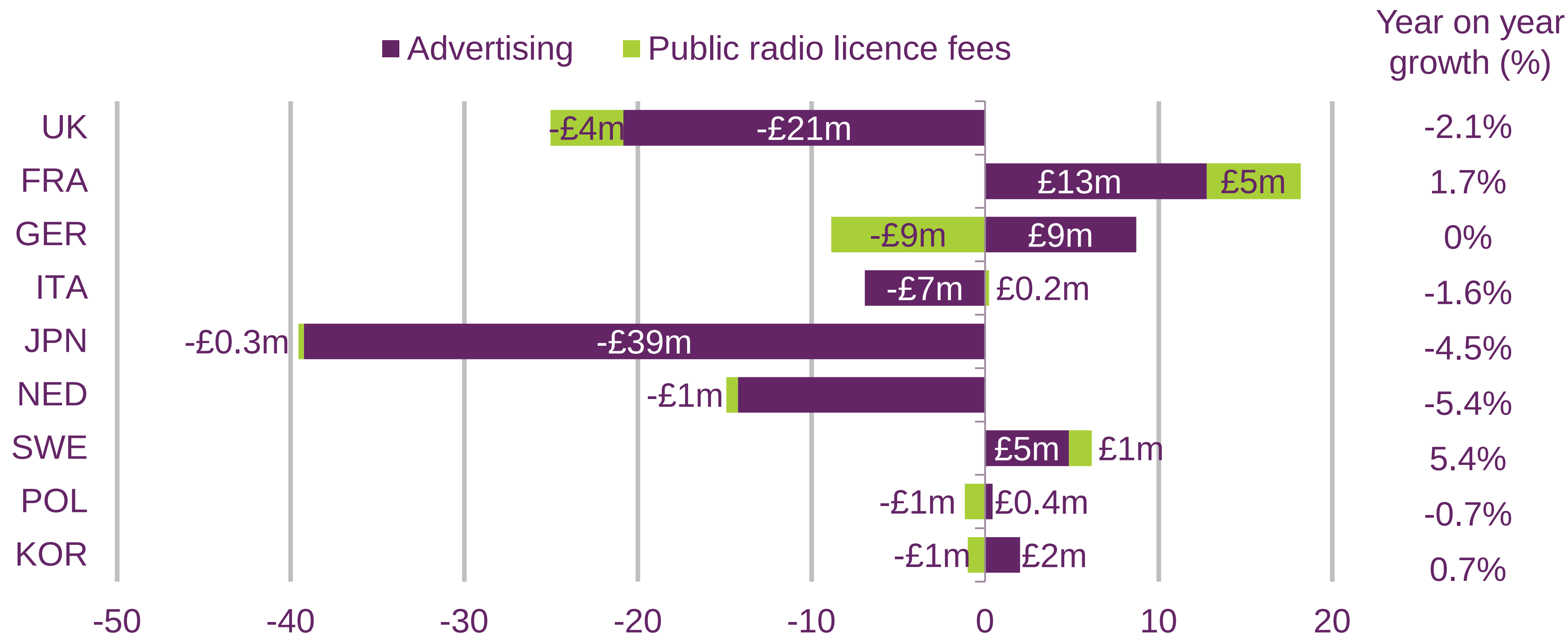
The most substantial increases in radio revenue, by component: 2012-2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013.

Figure 4.5

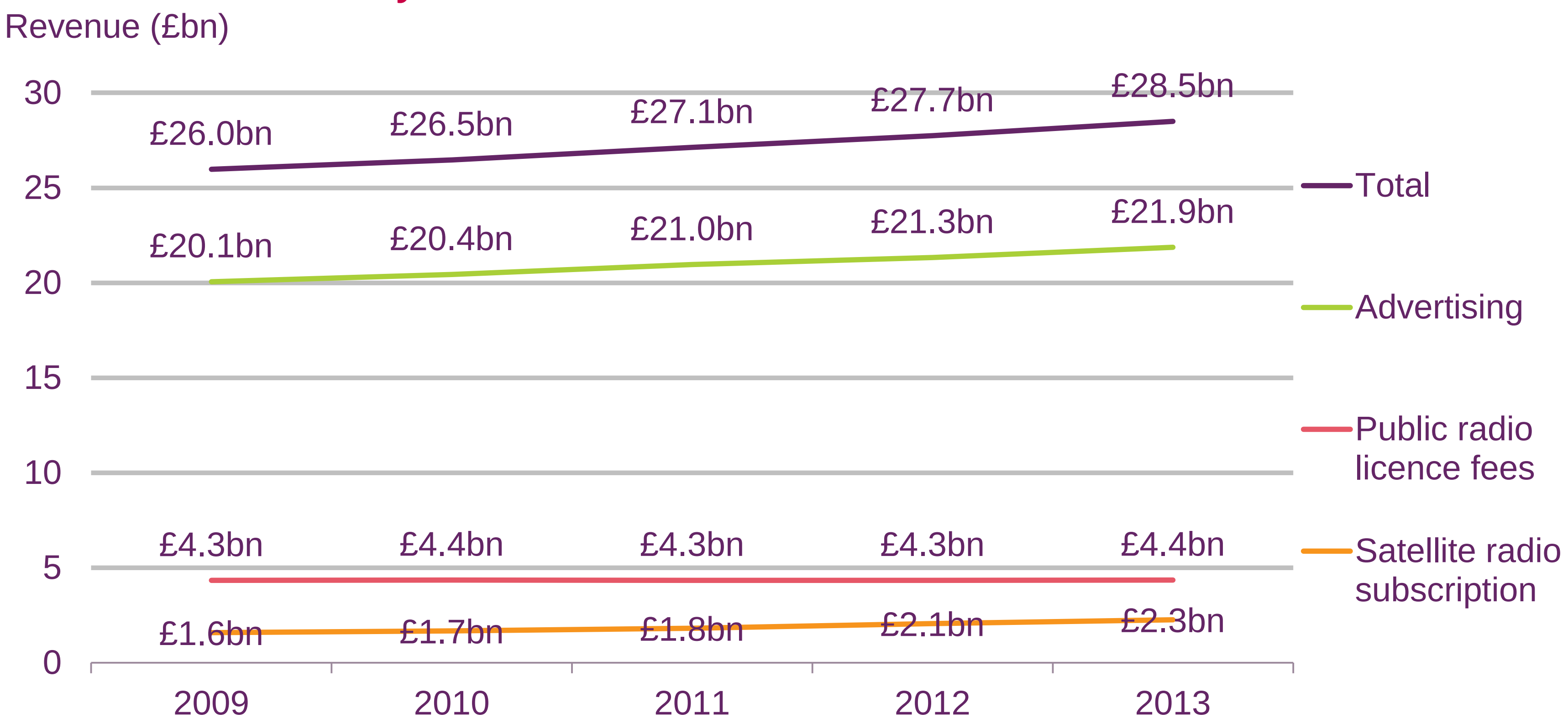
Changes in radio revenue among comparator countries with public radio licence fees, by component: 2012-2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.6

Worldwide industry revenues: 2009-2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013.

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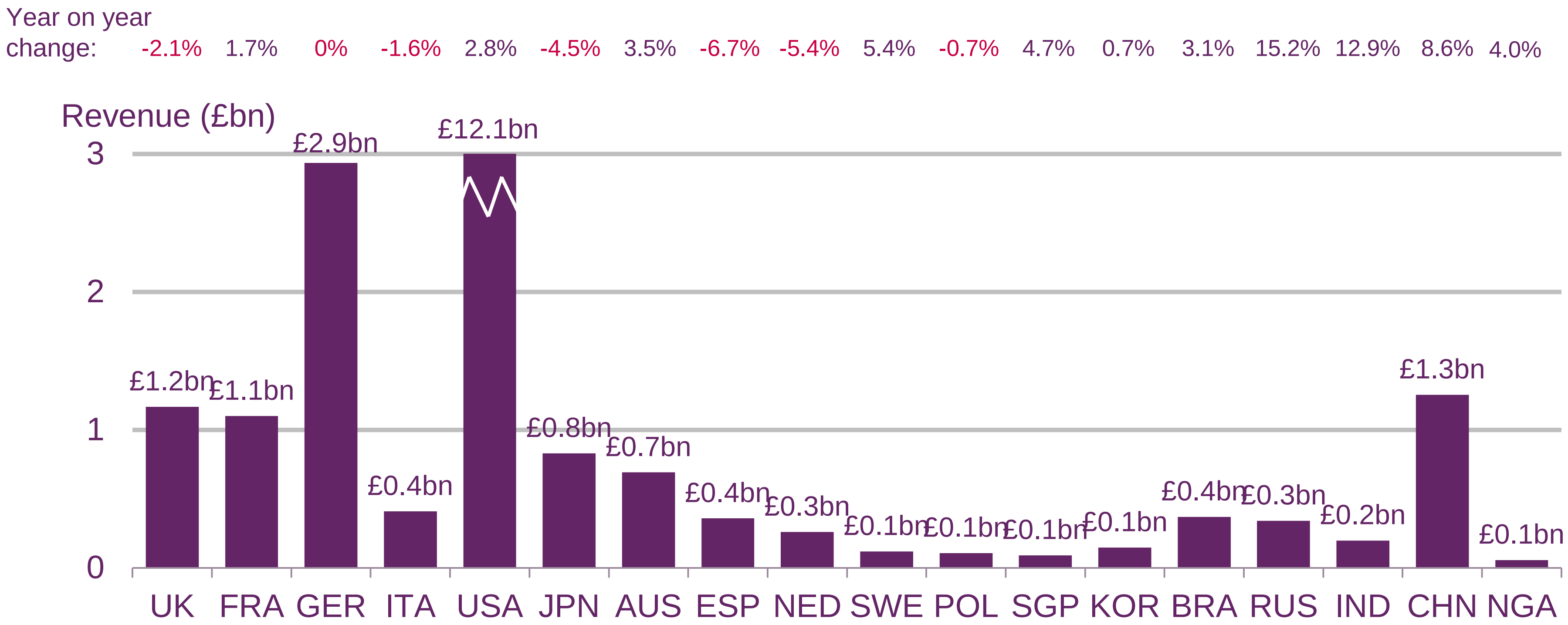
Figure 4.7

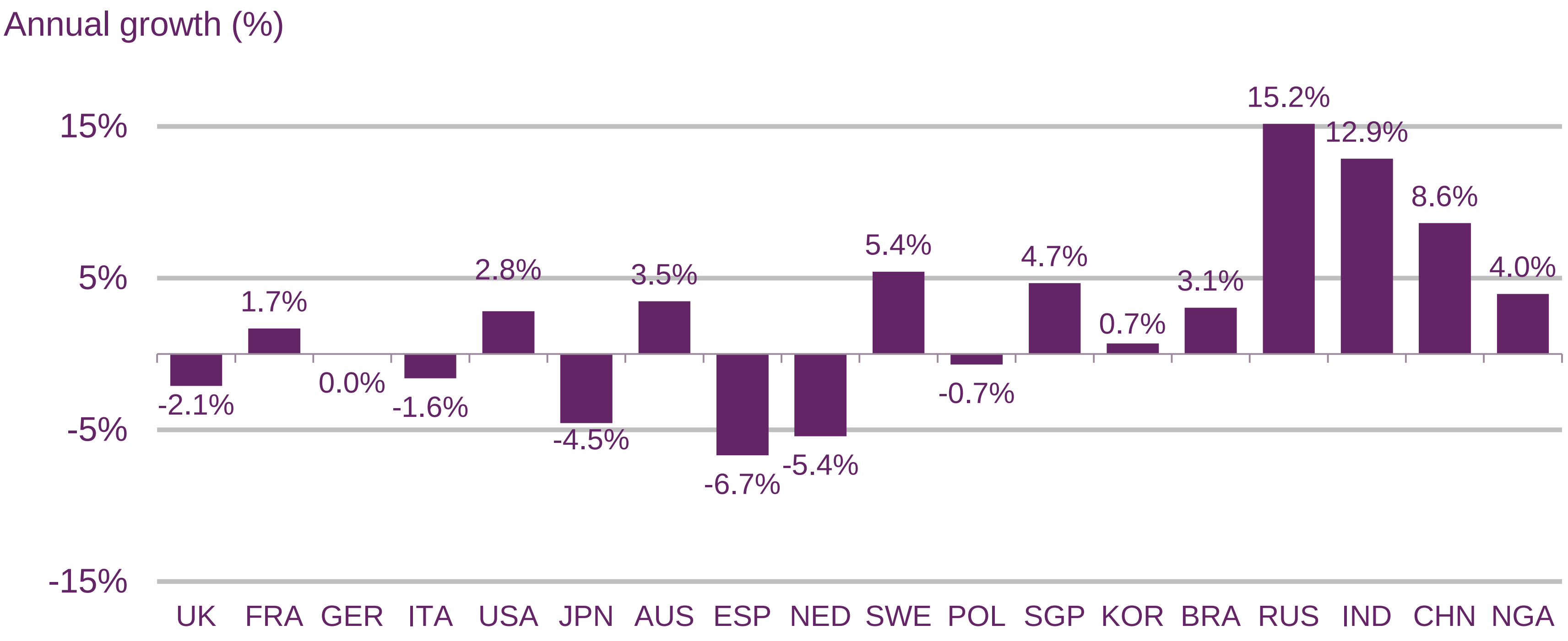
Radio industry revenues: 2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.8

Radio industry revenue annual growth: 2012-2013



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

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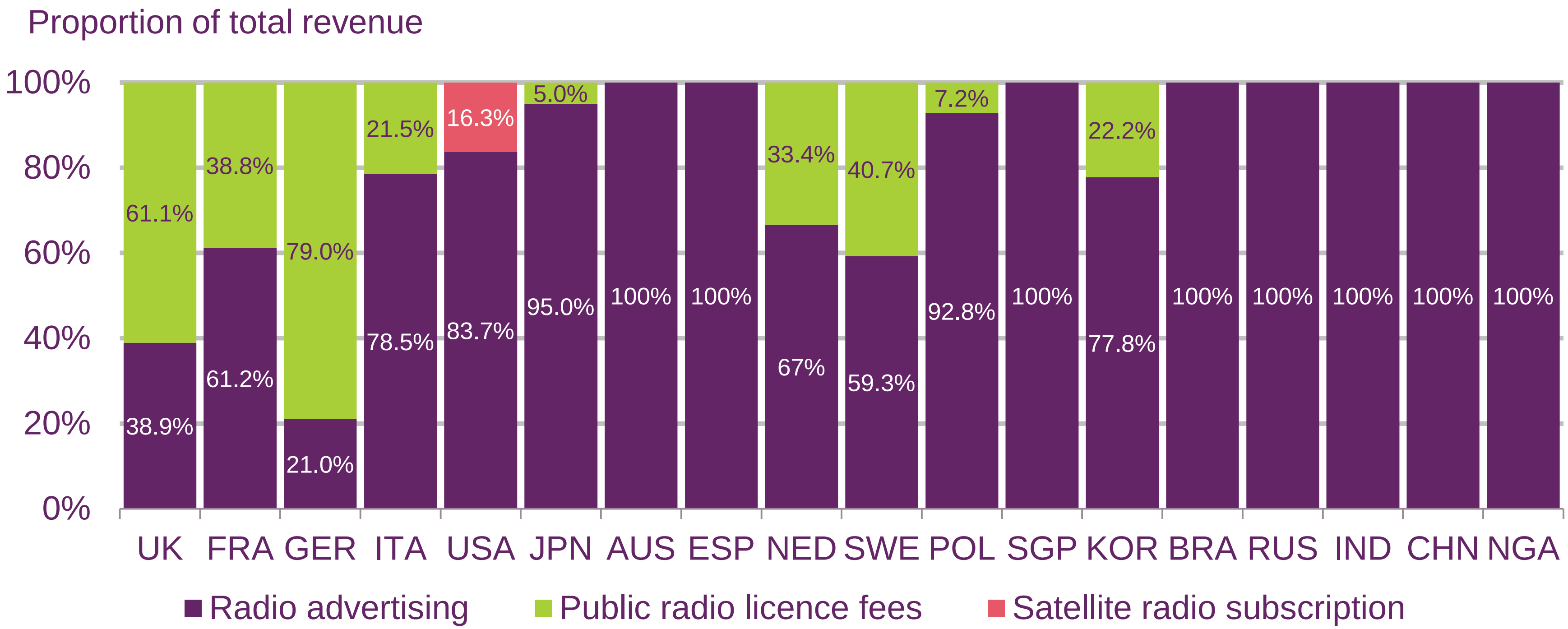
Figure 4.9

Proportion of radio revenue, by source

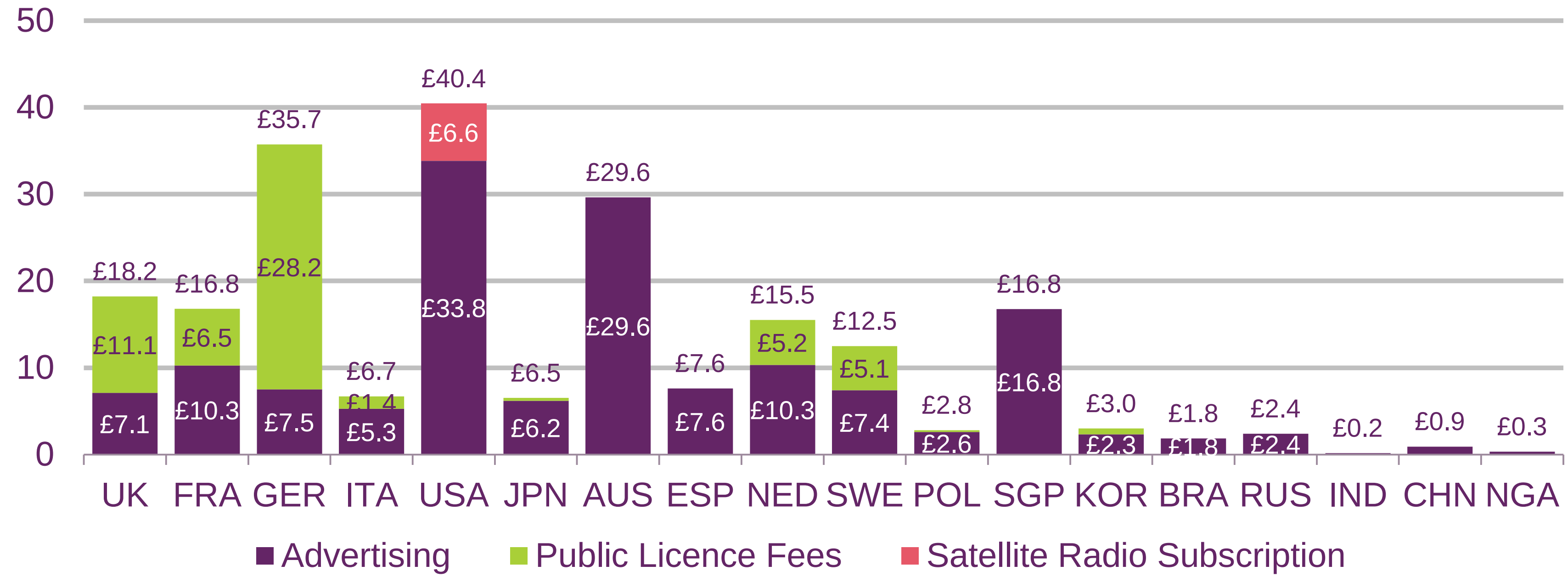


Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

Figure 4.10

Radio industry revenues, per head of population: 2013

£ per head (totals above bars)



Source: Ofcom analysis based on data from PricewaterhouseCoopers Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.56 to the GBP, representing the IMF average for 2013. Note that the UK radio industry figure is sourced from broadcaster returns made to Ofcom.

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Figure 4.11

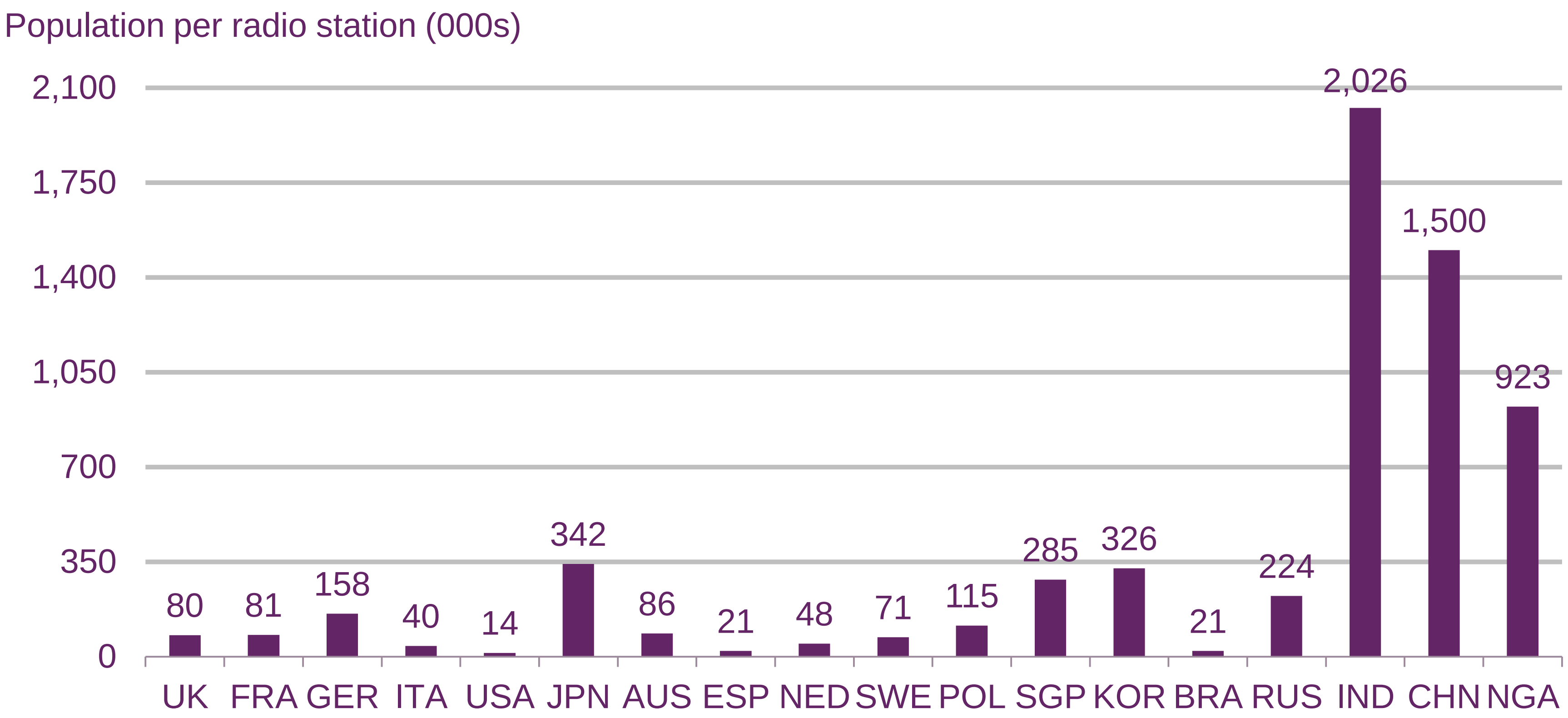
Number of radio stations, by country: 2008-2013

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
2008	724	794	518	-	21,070	372	-	-	349	120	288	19	151	8,163	638	436	298	62
2009	769	794	518	-	21,439	372	-	-	349	120	305	19	151	8,601	638	477	372	77
2010	745	794	518	-	21,609	372	-	-	349	120	318	19	151	9,184	638	481	465	96
2011	762	794	518	-	21,889	372	273	-	349	134	323	19	151	9,479	638	486	581	120
2012	772	794	518	-	22,080	372	273	-	349	134	326	19	151	9,589	638	522	726	150
2013	**803**	**814**	**518**	**1,527**	**22,188**	**372**	**273**	**2,258**	**349**	**134**	**332**	**19**	**151**	**9,629**	**638**	**618**	**907**	**188**

Source: IHS/Ofcom Note: No data were available for Italy and Spain between 2008 and 2012 or Australia between 2008 and 2010. Where stations are broadcast digitally as well as on analogue, these will be counted twice.

Figure 4.12

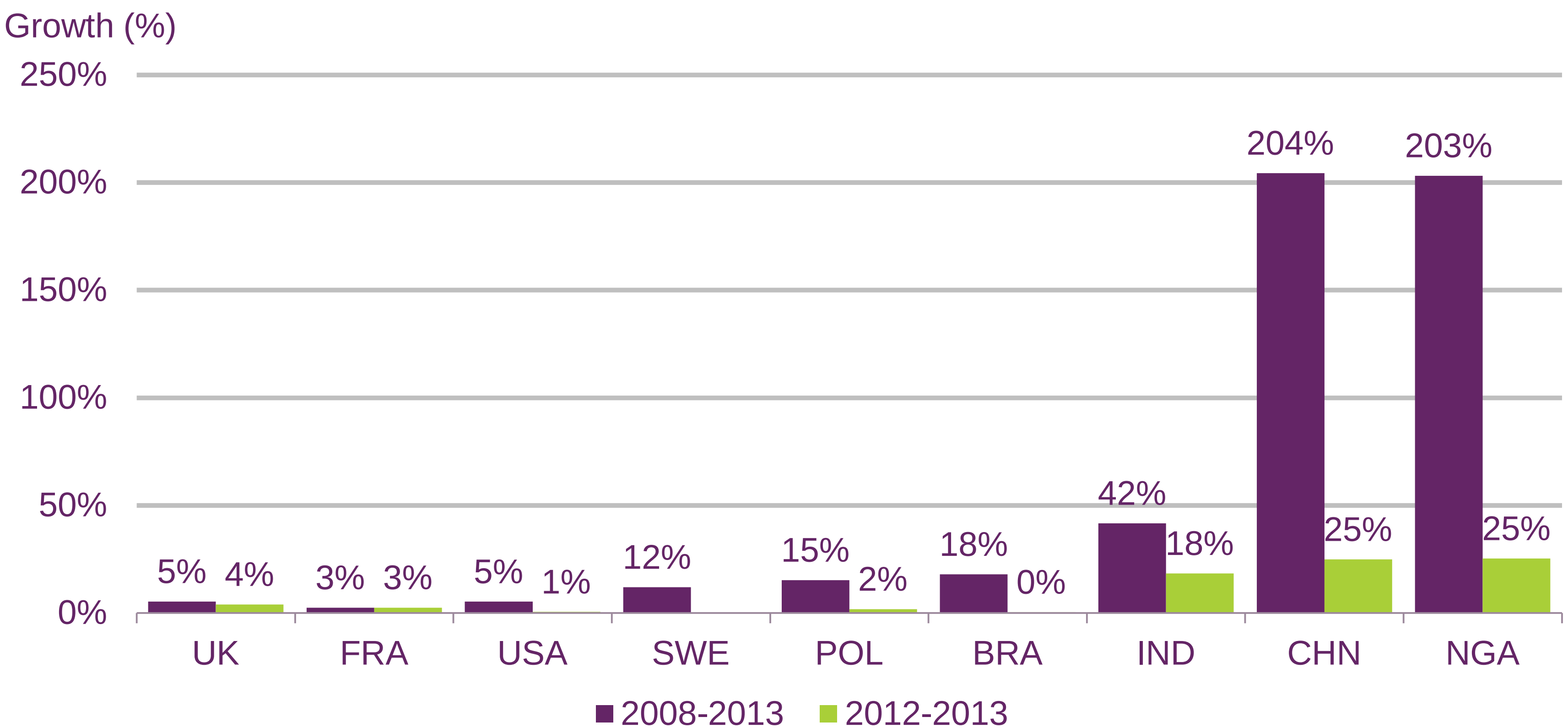
Population per radio station: 2013



Source: IHS/ Ofcom.

Figure 4.13

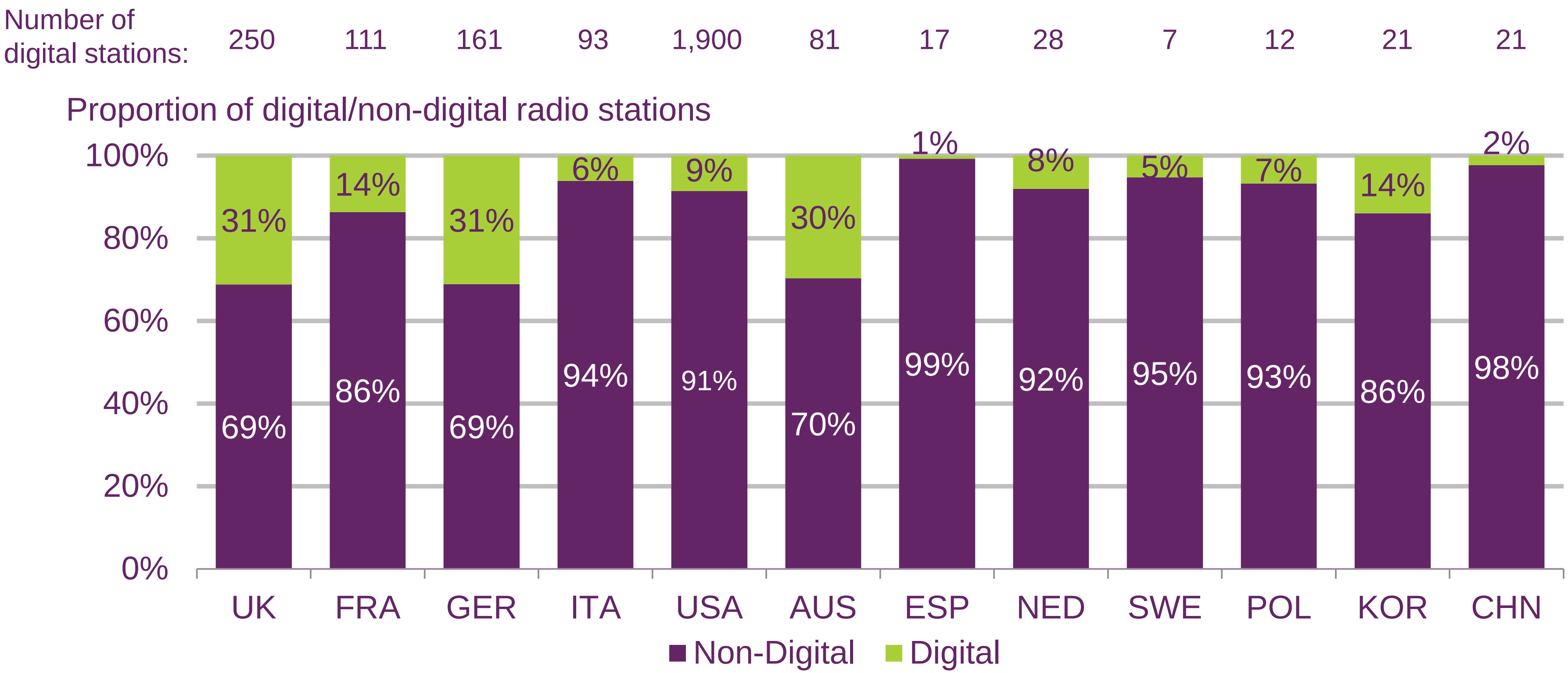
Growth in the number of broadcast radio stations: 2008-2013



Source: IHS / Ofcom. Note: No data were available for ITA and ESP. There was no change in the number of stations for GER, JPN, AUS, NED, SGP, KOR and RUS so these countries are not included on the chart.

Figure 4.14

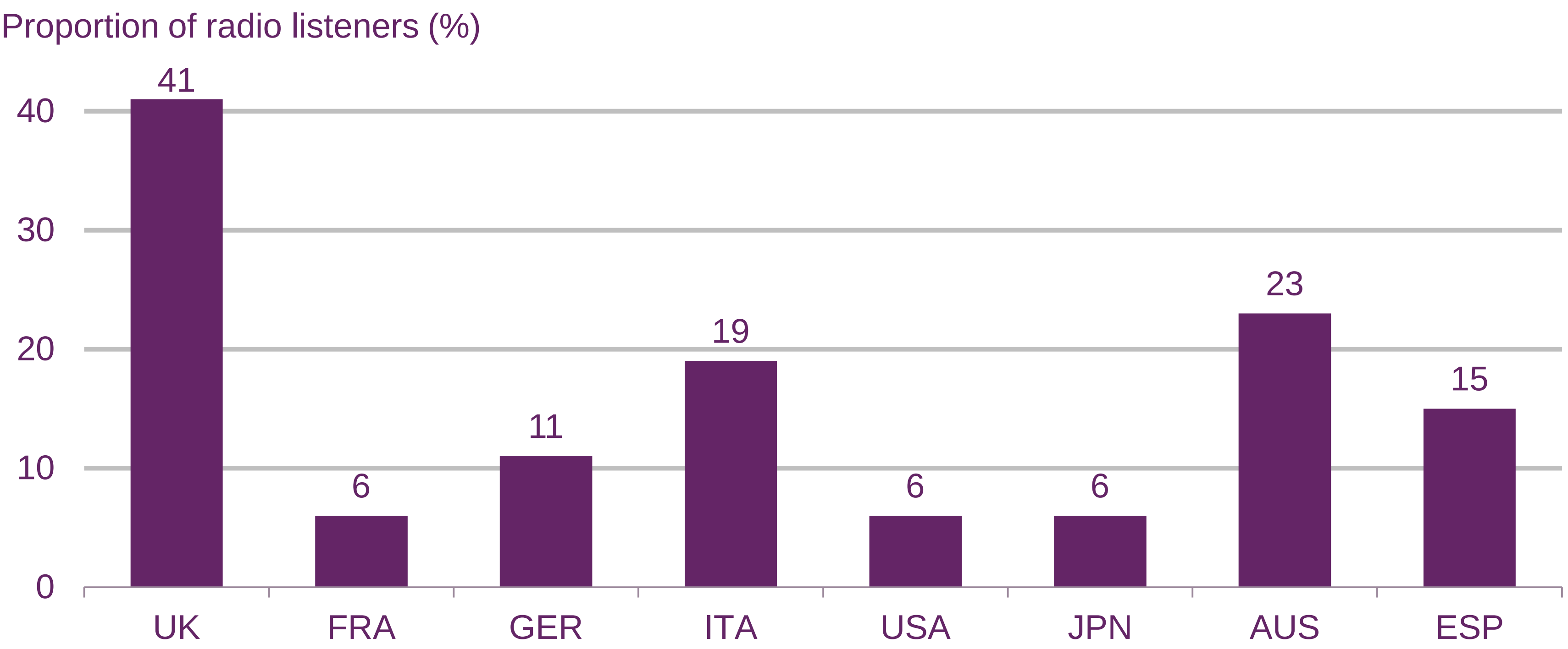
Proportion of digital broadcast stations to analogue broadcast stations, in countries with stations broadcasting digitally: 2013



Source: IHS/ industry data/ Ofcom. Note: Where stations are broadcast digitally as well as on analogue, these are counted twice.

Figure 4.15

Take-up of DAB radio sets among regular radio listeners: 2014



Source: Ofcom consumer research October 2014
Base: Regular radio listeners, UK=636, FRA=729, GER=751, ITA=740, USA=629, JPN=401, AUS=632, ESP=720, CHN=285 Q.3a Which of the following devices do you have in your home?

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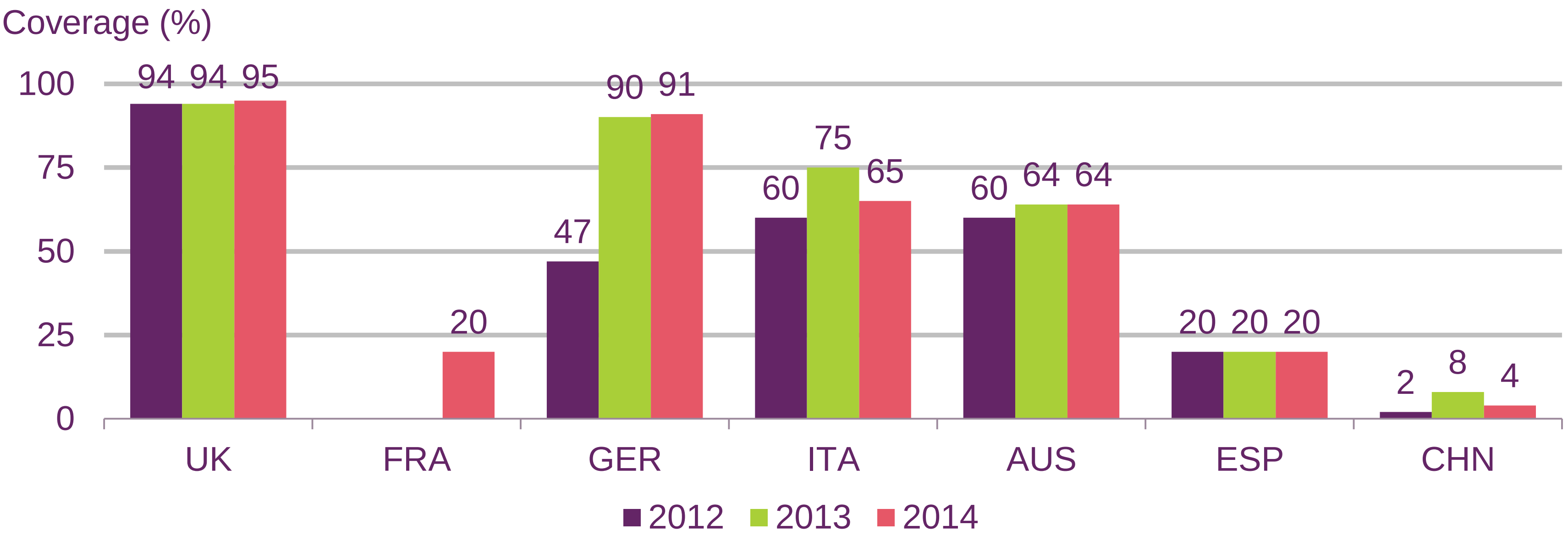
Figure 4.16

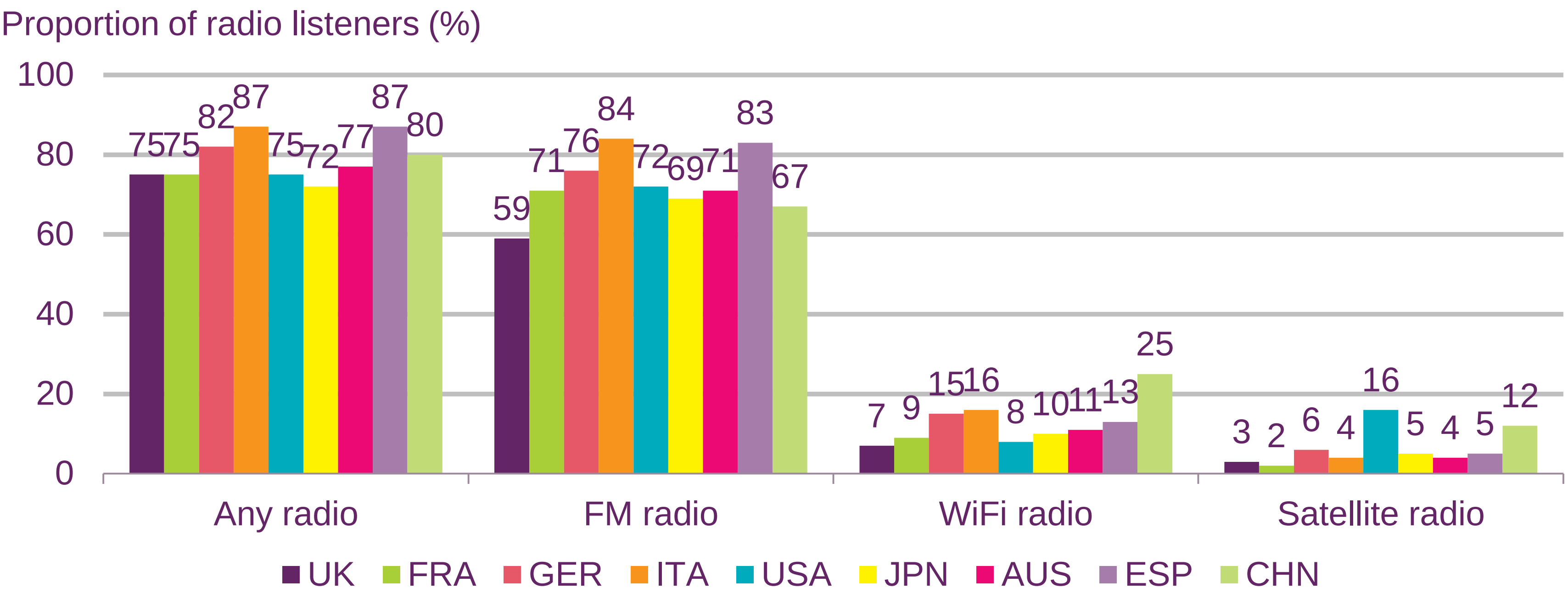
Coverage of DAB/ DAB+/ DMB radio: 2012 to 2014



Source: WorldDMB Global Update, Digital radio broadcasting using the DAB family of standards, September 2012; 2013, 2014
Note: DAB services were launched in France in June 2014. No data for DAB coverage exist for Japan due to digital television and radio services being broadcast over ISBD standards. In the US satellite radio is the country's main digital radio platform, which has grown to become a major component of US radio revenue since its introduction in the mid-2000s

Figure 4.17

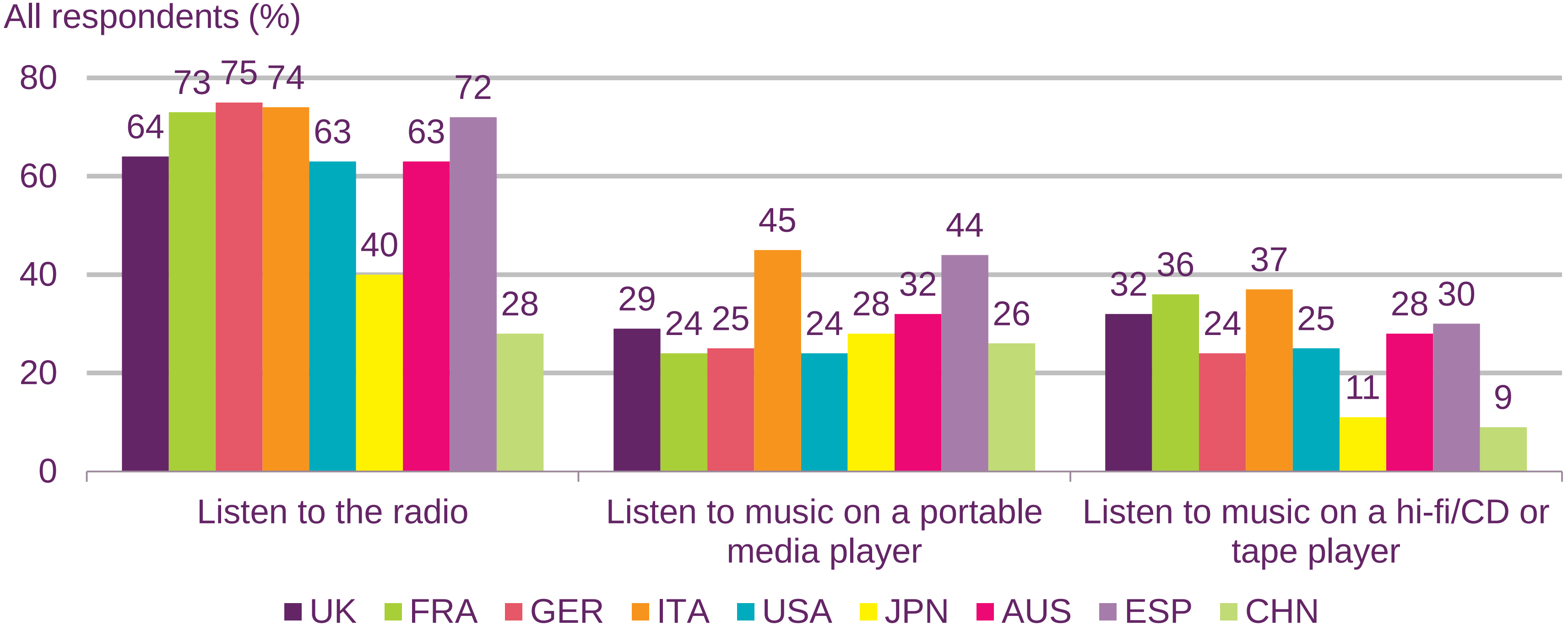
Take-up of any radio set, and FM, WiFi and satellite radio sets, among regular radio listeners



Source: Ofcom consumer research October 2014
Base: Regular radio listeners, UK=636, FRA=729, GER=751, ITA=740, USA=629, JPN=401, AUS=632, ESP=720, CHN=285 Q.3a Which of the following devices do you have in your home?

Figure 4.18

Proportion of adults who claim regularly to consume audio content

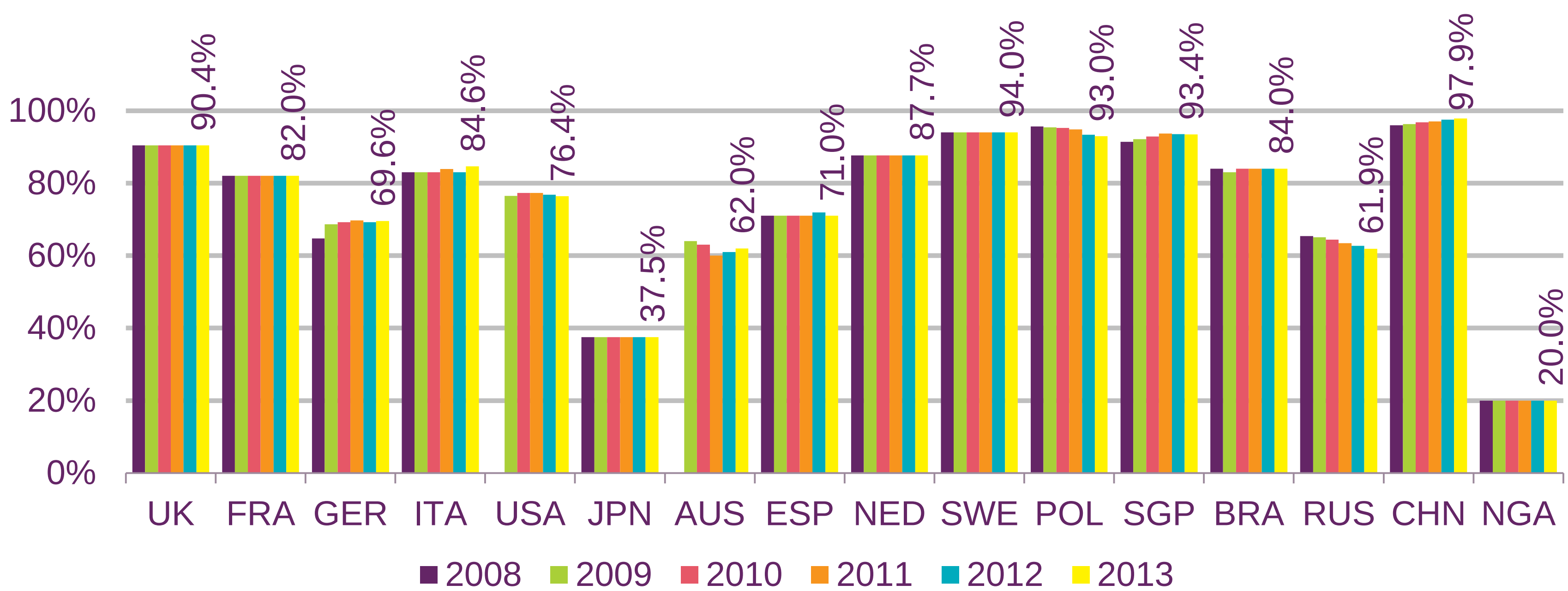


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q.6 Which of the following do you regularly do (at least once a week)?

Figure 4.19

Reach of radio: 2008 to 2013

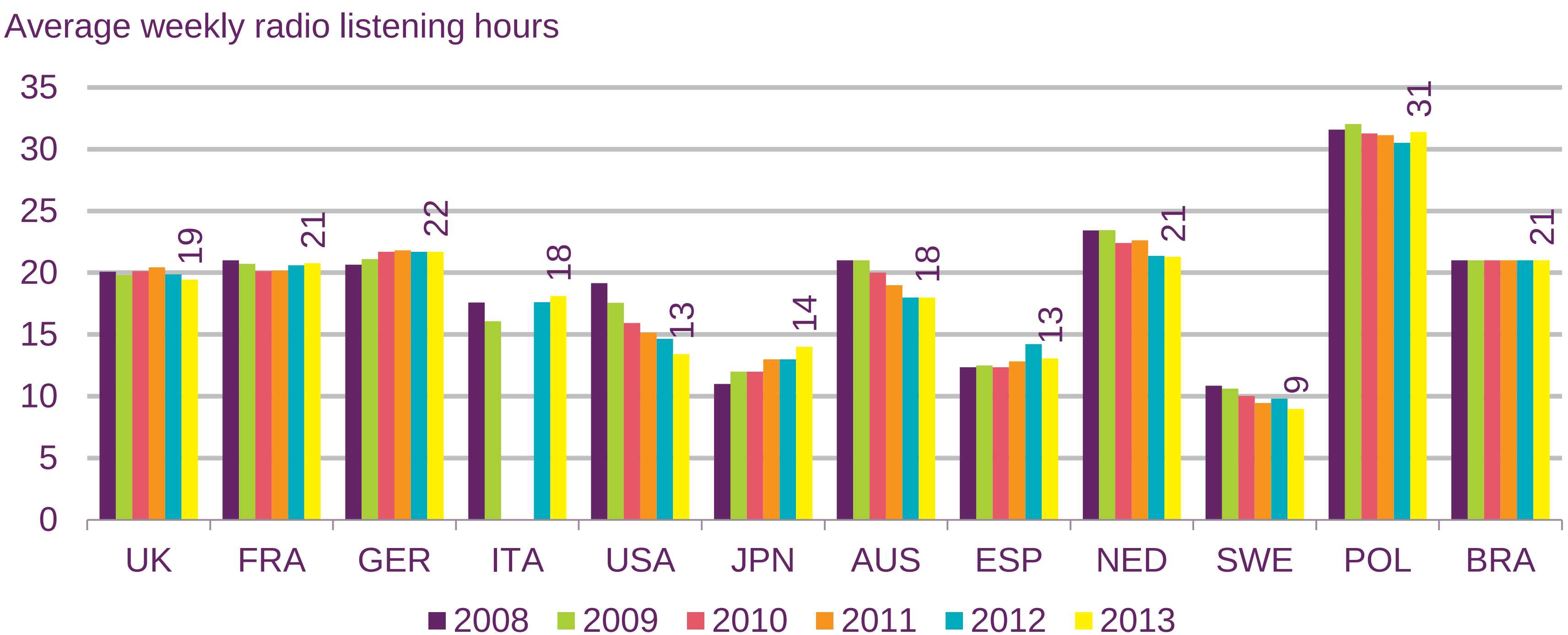
Proportion of households (%)



Source: IHS
Note: Different measurement systems in each country are likely to use different methodologies so comparative data should be treated as indicative only.

Figure 4.20

Average weekly radio listening hours, by country: 2008-2013



Source: IHS

Note: Data were unavailable for 2010-2011 for ITA. Different measurement systems in each country are likely to use different methodologies so comparative data should be treated as indicative only.

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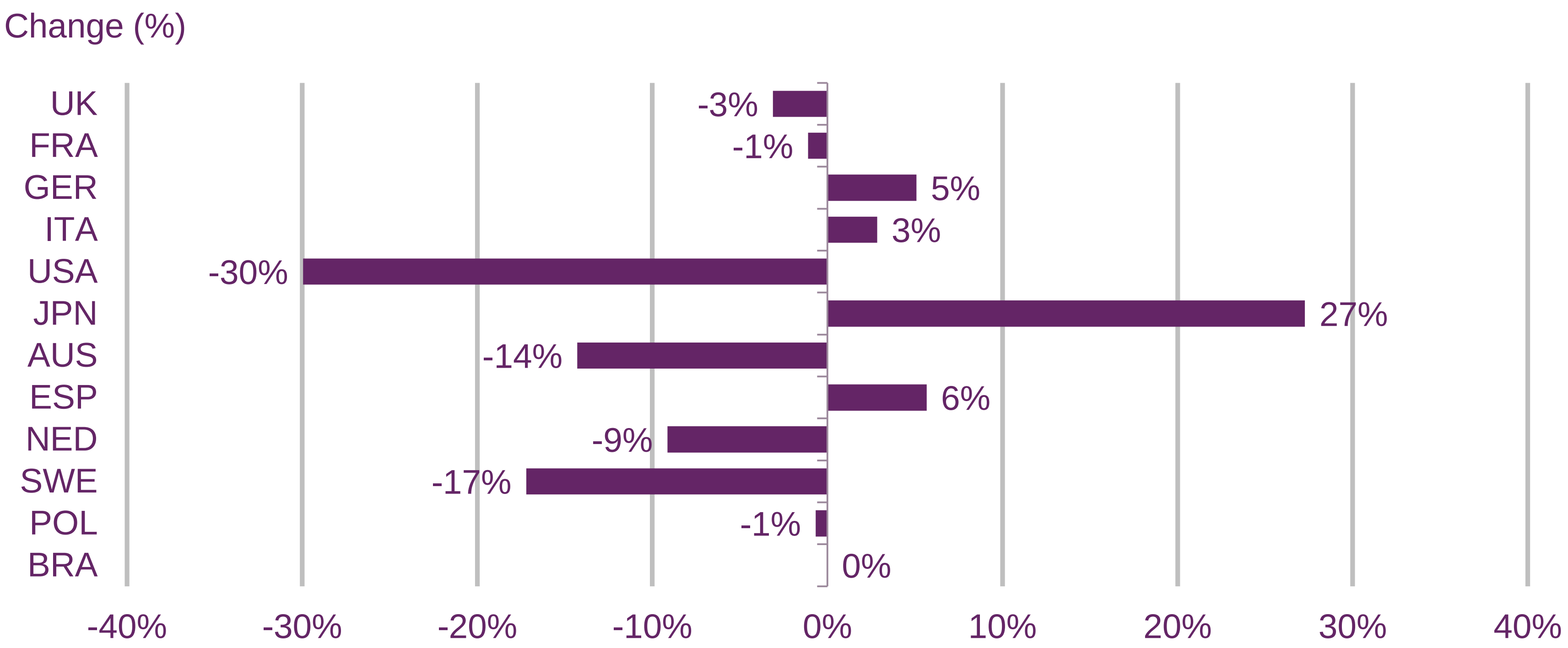
Figure 4.21

Change in average weekly listening hours: 2008 - 2013

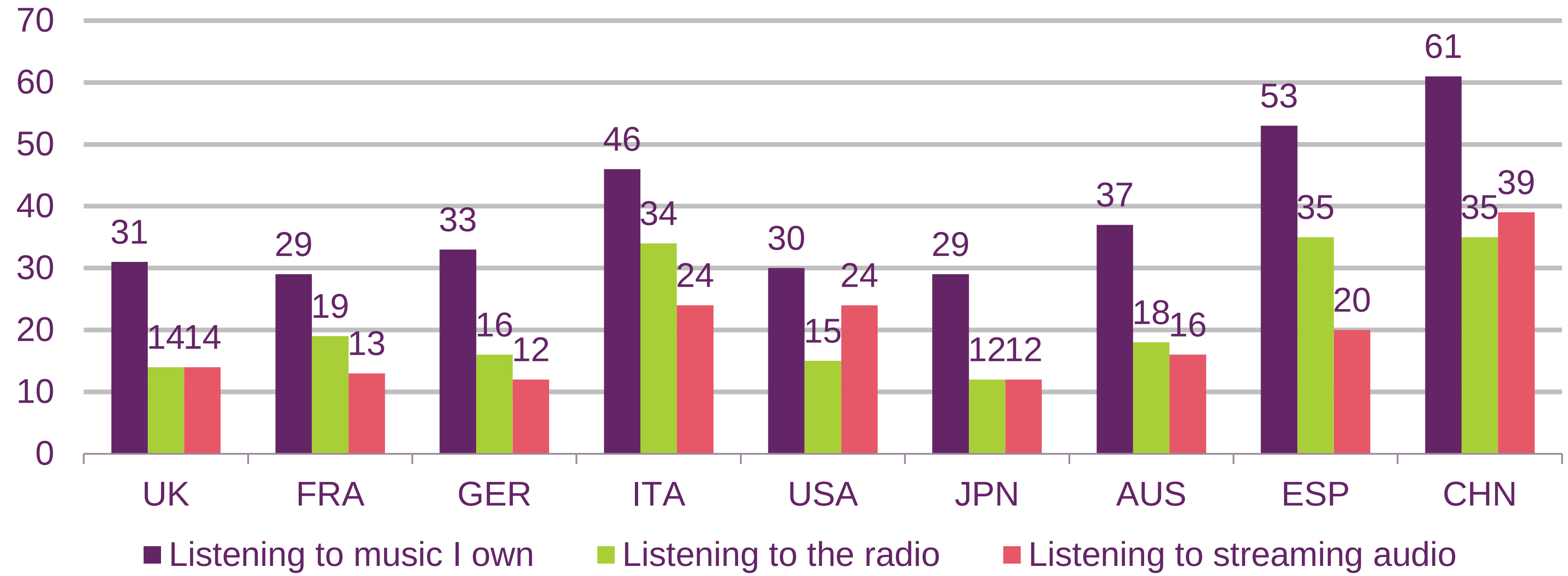


Source: IHS

Figure 4.22

Use of a smartphone / mobile phone to consume audio content

All respondents with a mobile phone/ smartphone (%)



Source: Ofcom consumer research October 2014
Base: All respondents with a mobile phone/ smartphone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853
Q.9d Which, if any, of the following audio activities do you use each of your devices for?

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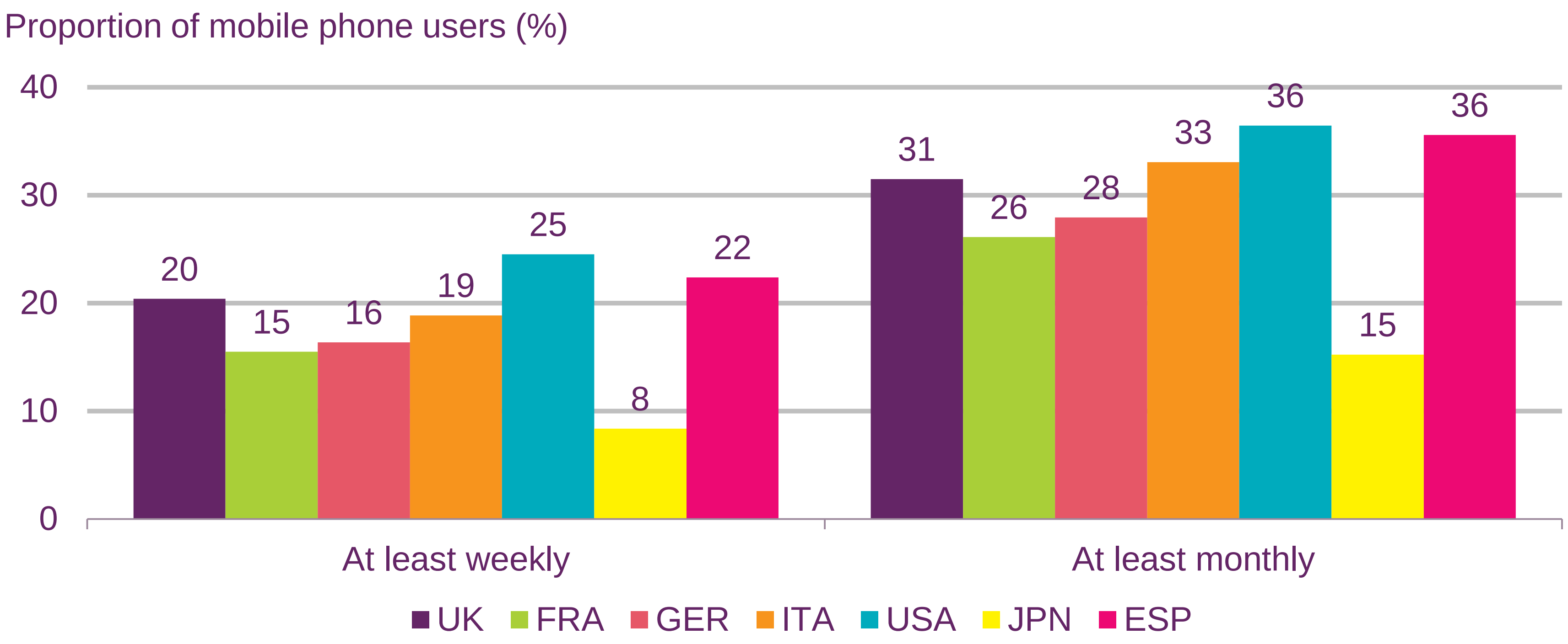
Figure 4.23

Frequency of listening to music on a mobile phone

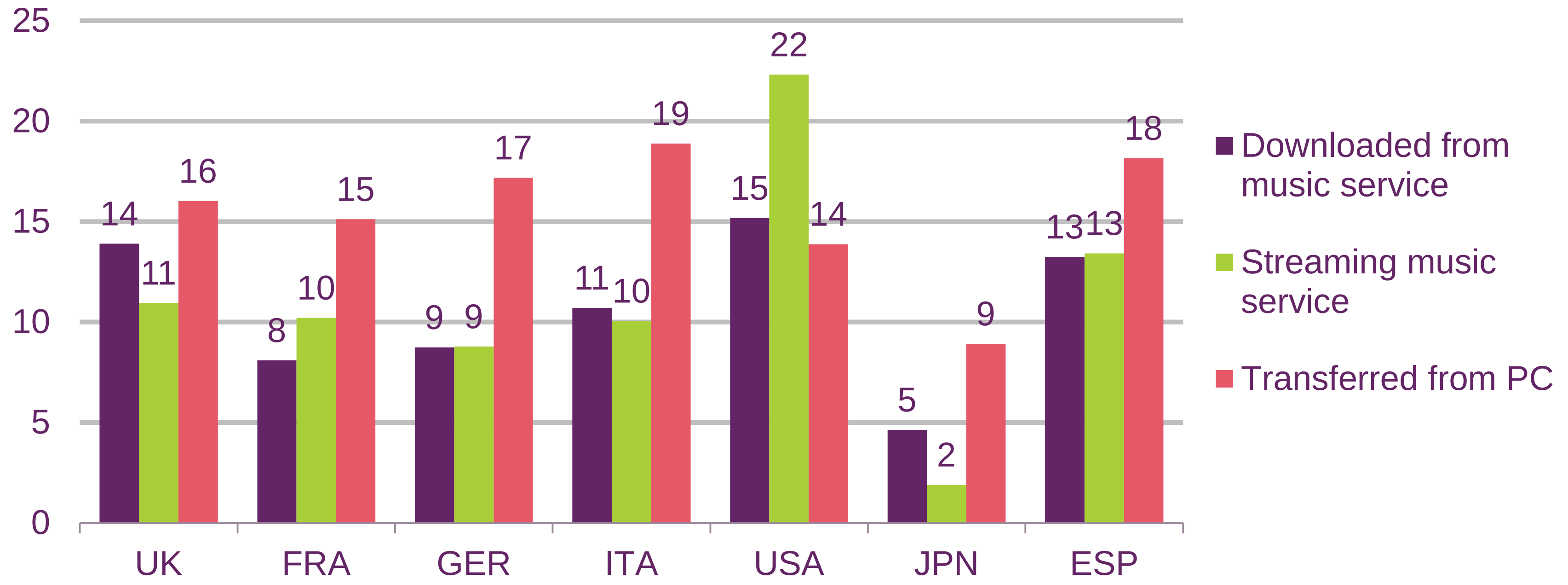


Source: comScore MobiLens, August 2014 (three-month average, mobile phone users aged 13+)

Figure 4.24

Source of music listened to on a mobile phone

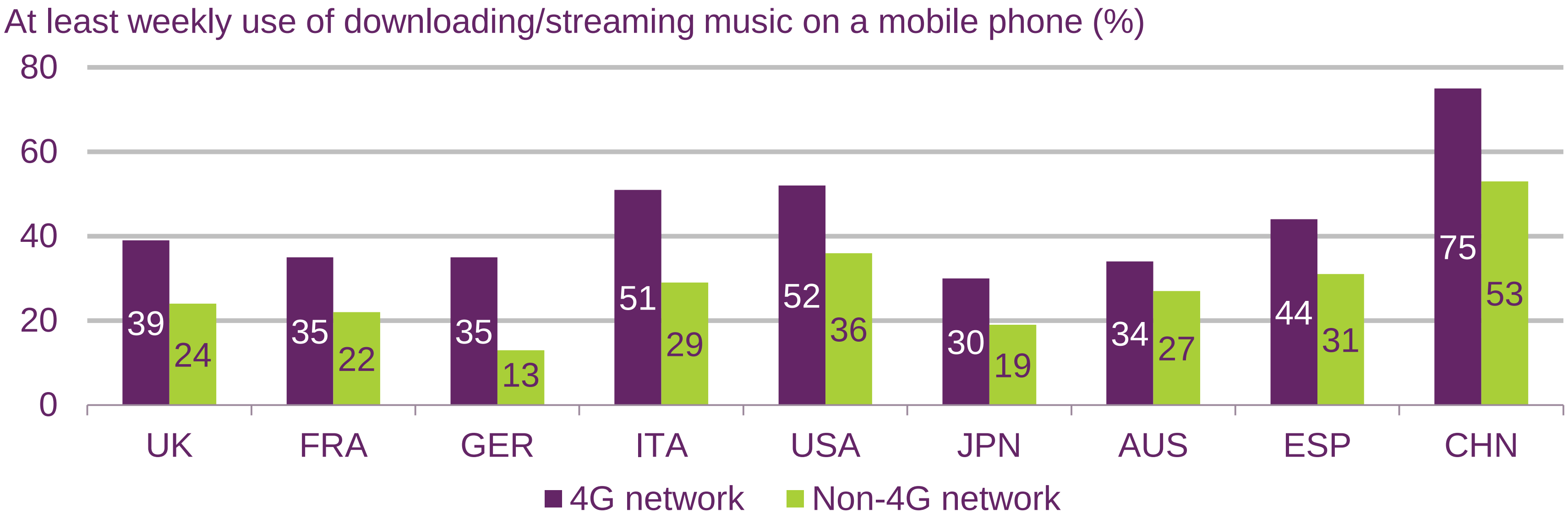
Proportion of mobile phone users (%)



Source: comScore MobiLens, August 2014 (3 month average, mobile phone users aged 13+)

Figure 4.25

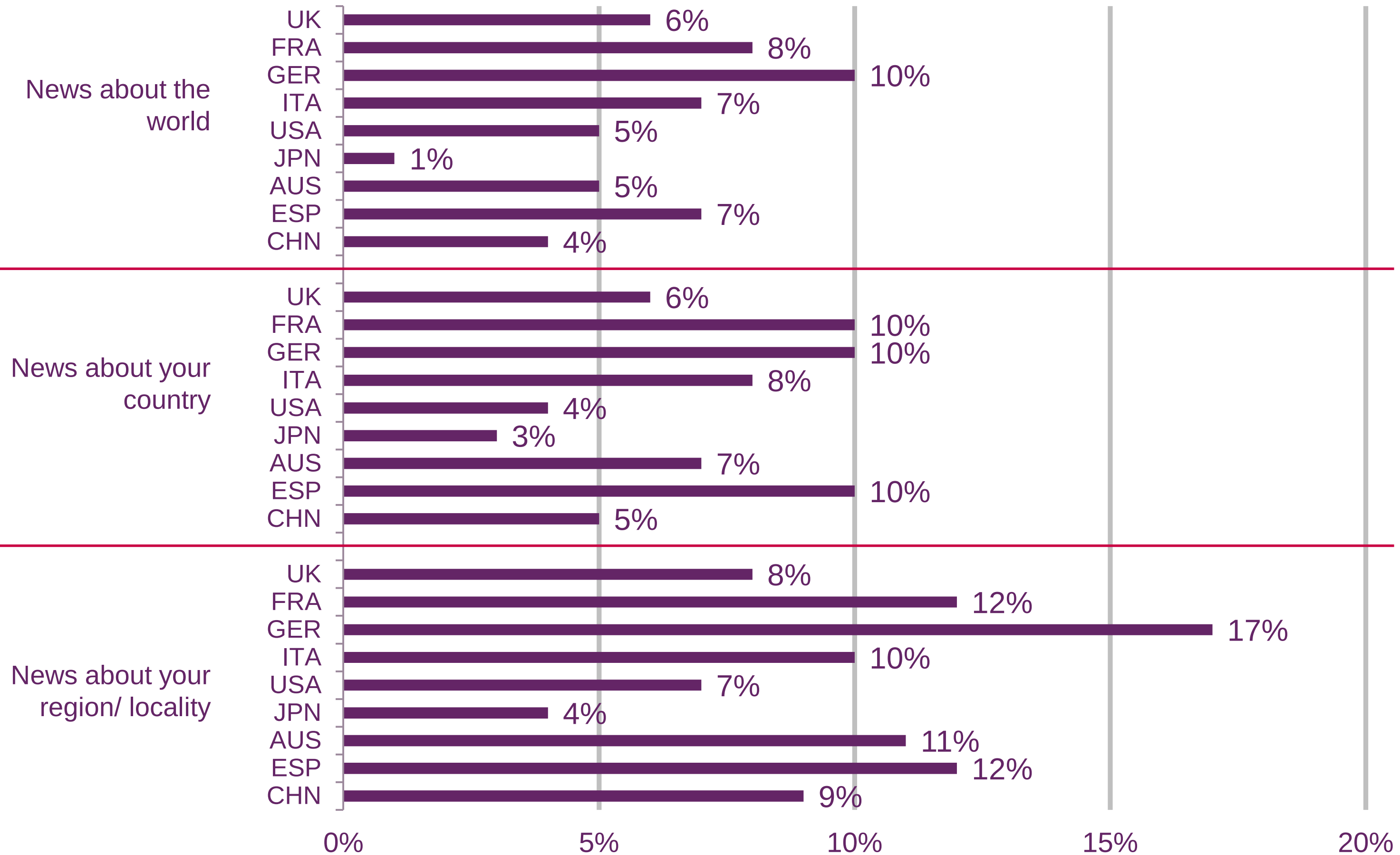
Frequency of downloading/streaming music on mobile phone (4G vs non-4G)



Source: Ofcom consumer research October 2014
Base: All respondents with 4G mobile broadband internet access or those who access the internet access via a mobile handset; UK=81, FRA=99, GER=54, ITA=83, USA=136, JPN=93, AUS=164, ESP=113, CHN=132; All respondents with non-4G mobile broadband internet access or those who access the internet access via a mobile handset; UK=252, FRA=261, GER=315, ITA=562, USA=138, JPN=140, AUS=282, ESP=491, CHN=431 Q.27 How often, if at all, do you use your main mobile phone to do each of the following?

Figure 4.26

Proportion of adults using radio as their main source of news, by country



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

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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+

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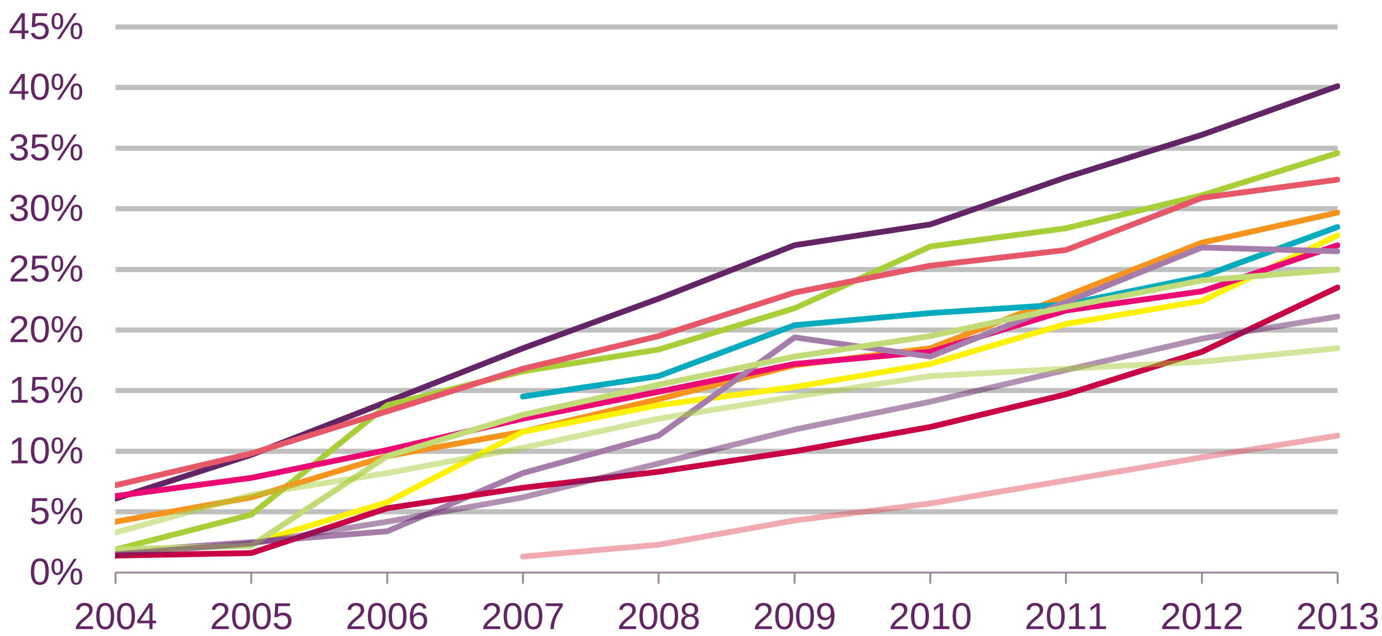
Figure 5.2

Internet share of total advertising spend

Internet share of all advertising spend (%)



	1 year PP change	5 year PP change
UK	4	18
NED	4	16
SWE	2	13
AUS	3	15
KOR	4	12
FRA	5	14
USA	4	12
POL	0	15
GER	1	10
ITA	5	15
ESP	2	12
JPN	1	6
SGP	2	9

Source: Warc data (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.

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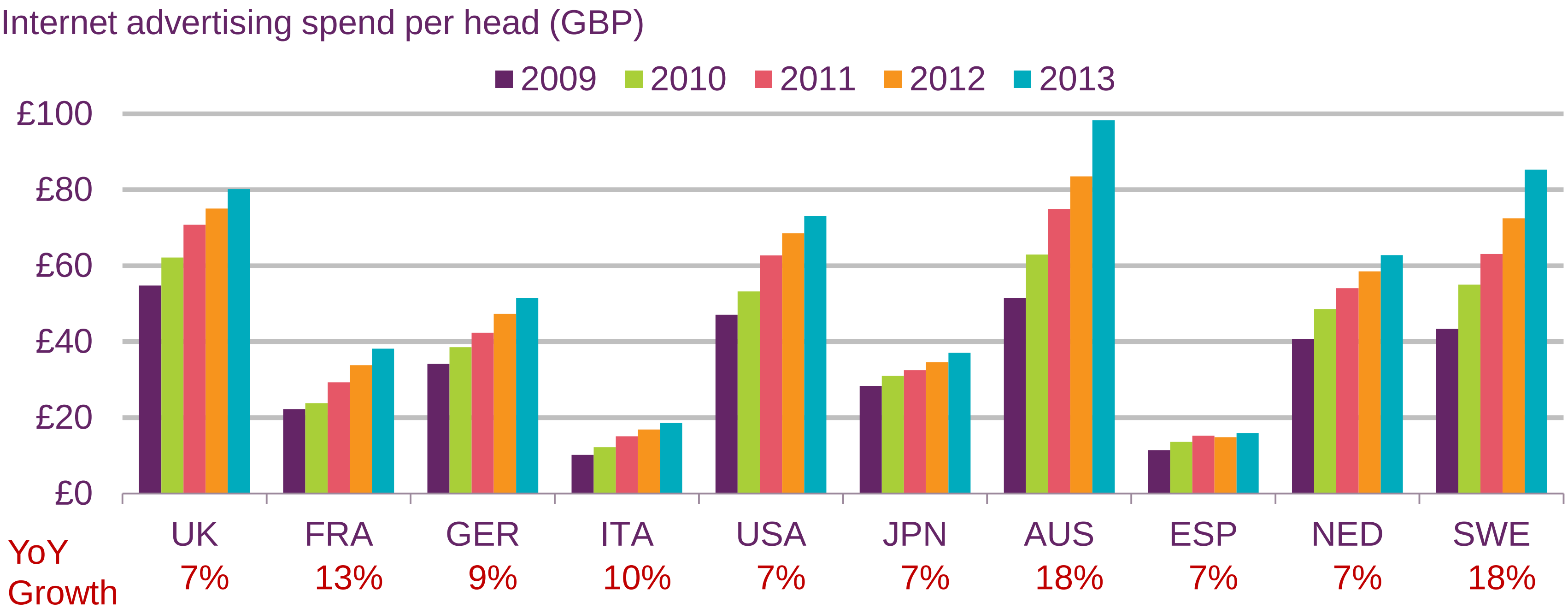
Figure 5.3a

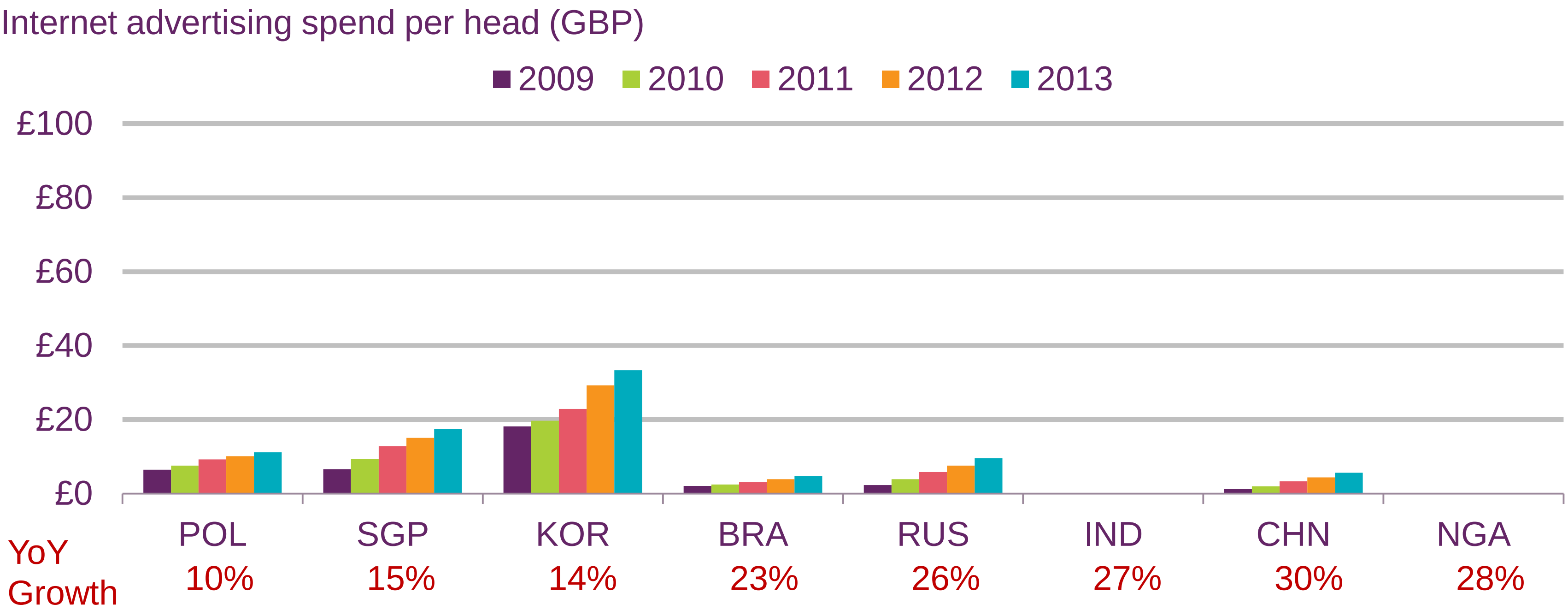
Fixed internet advertising expenditure per head: 2009-13



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. Population figures from Ofcom/IHS

Figure 5.3b

Fixed internet advertising expenditure per head: 2009-13

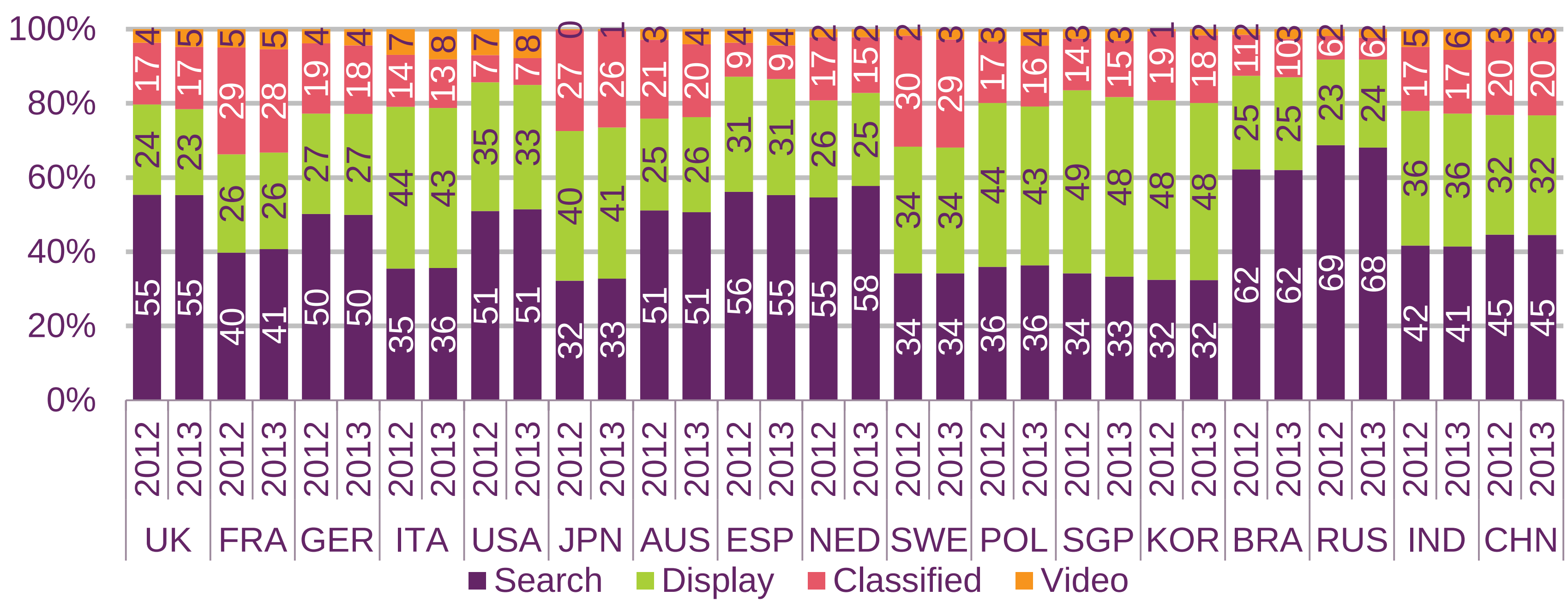


Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2014-2018 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS

Figure 5.4

Fixed internet advertising expenditure, by category: 2012-13

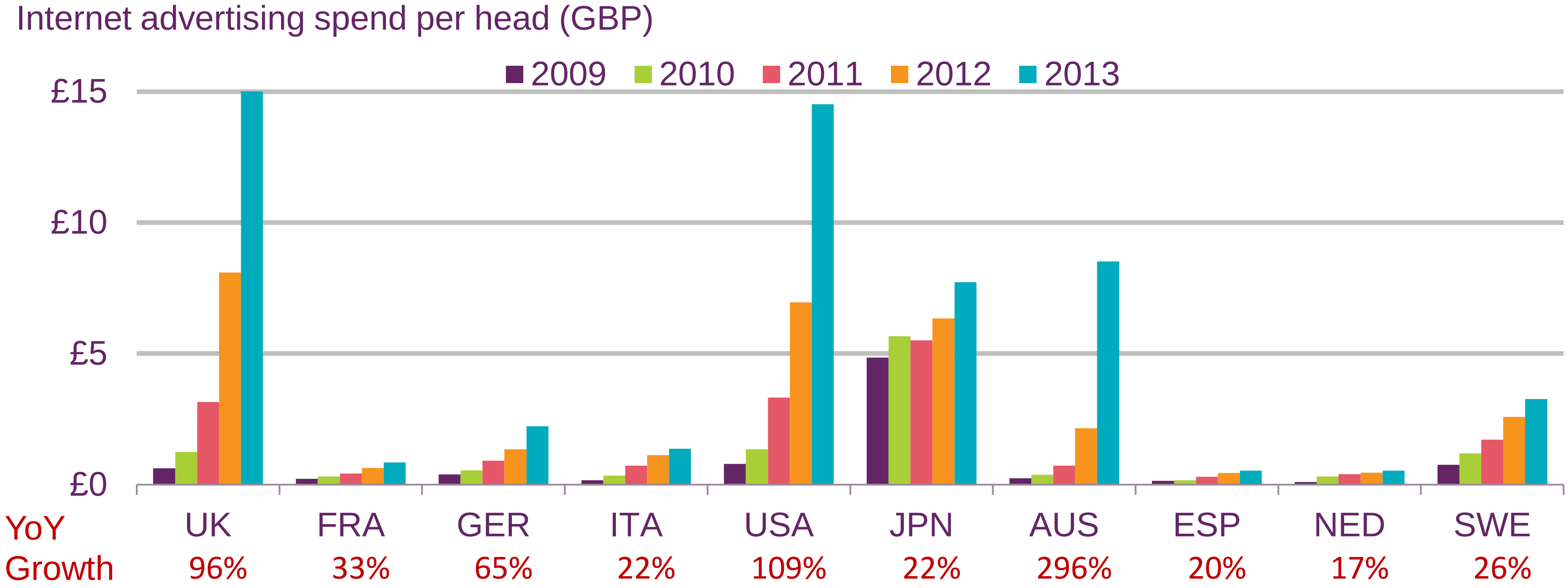
Proportion of internet advertising revenue (%)



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

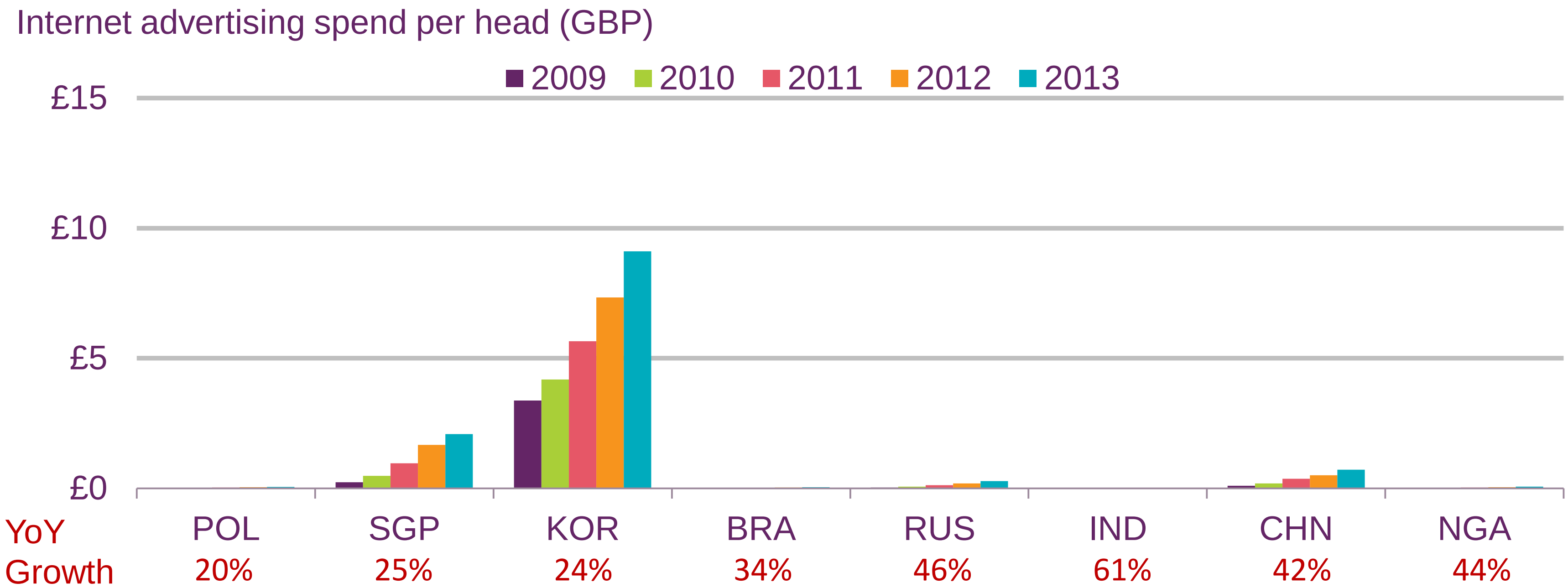
Mobile advertising expenditure per head: 2009-13



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. Population figures from Ofcom/IHS

Figure 5.5b

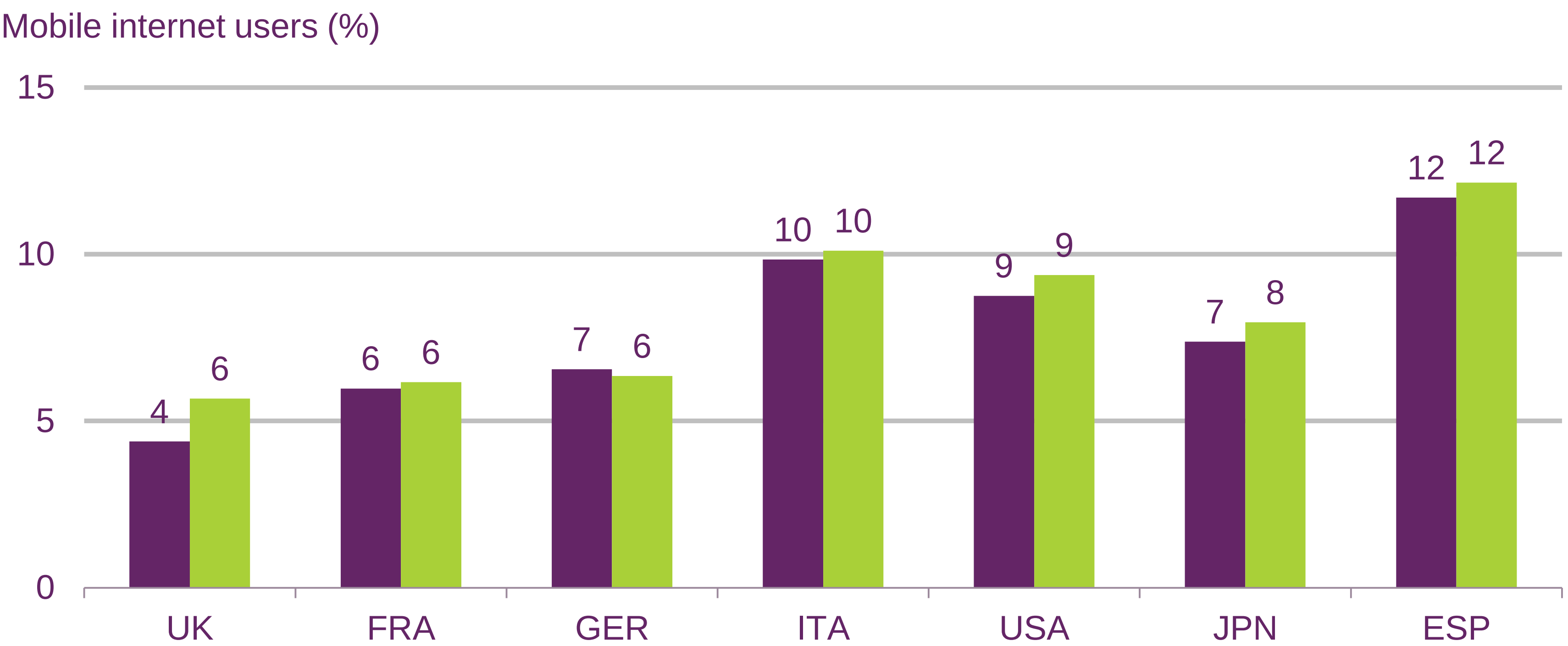
Mobile advertising expenditure per head: 2009-13



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. Population figures from Ofcom/IHS

Figure 5.6

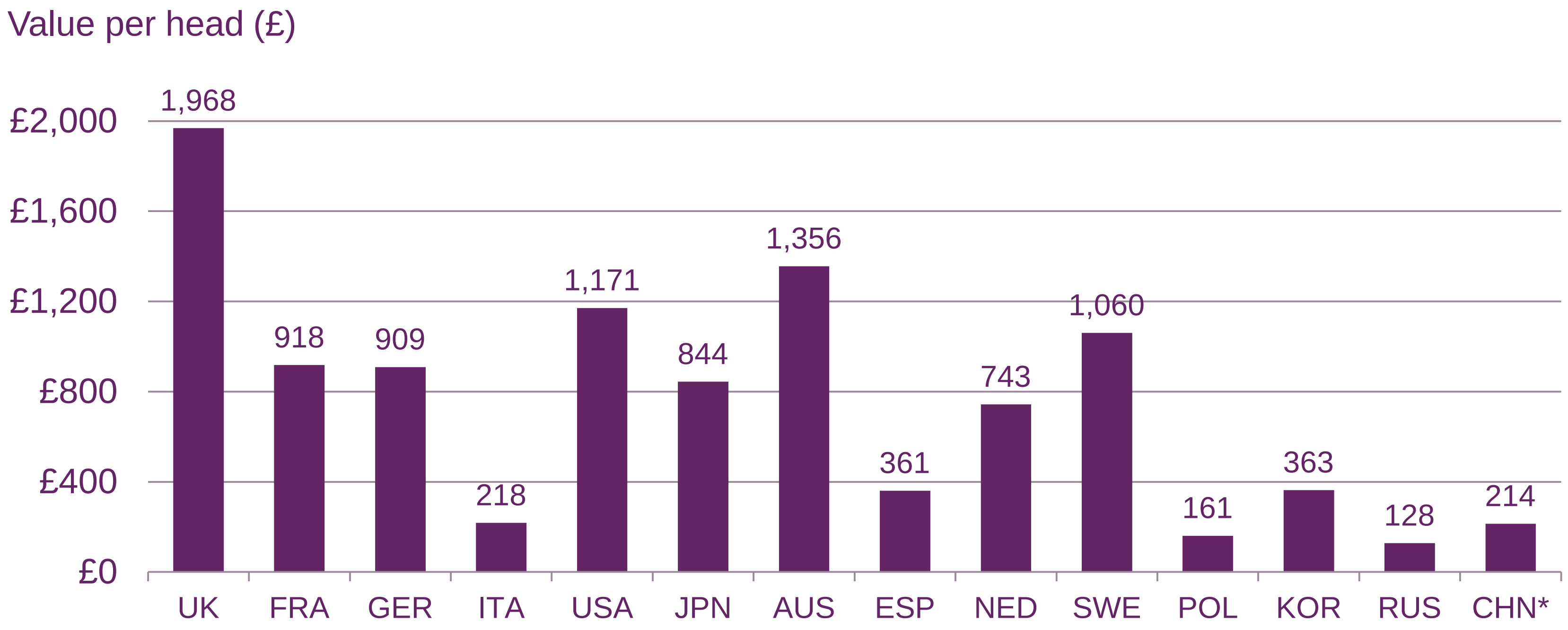
Tapped on an advert in a mobile browser or application in the past month



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



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.

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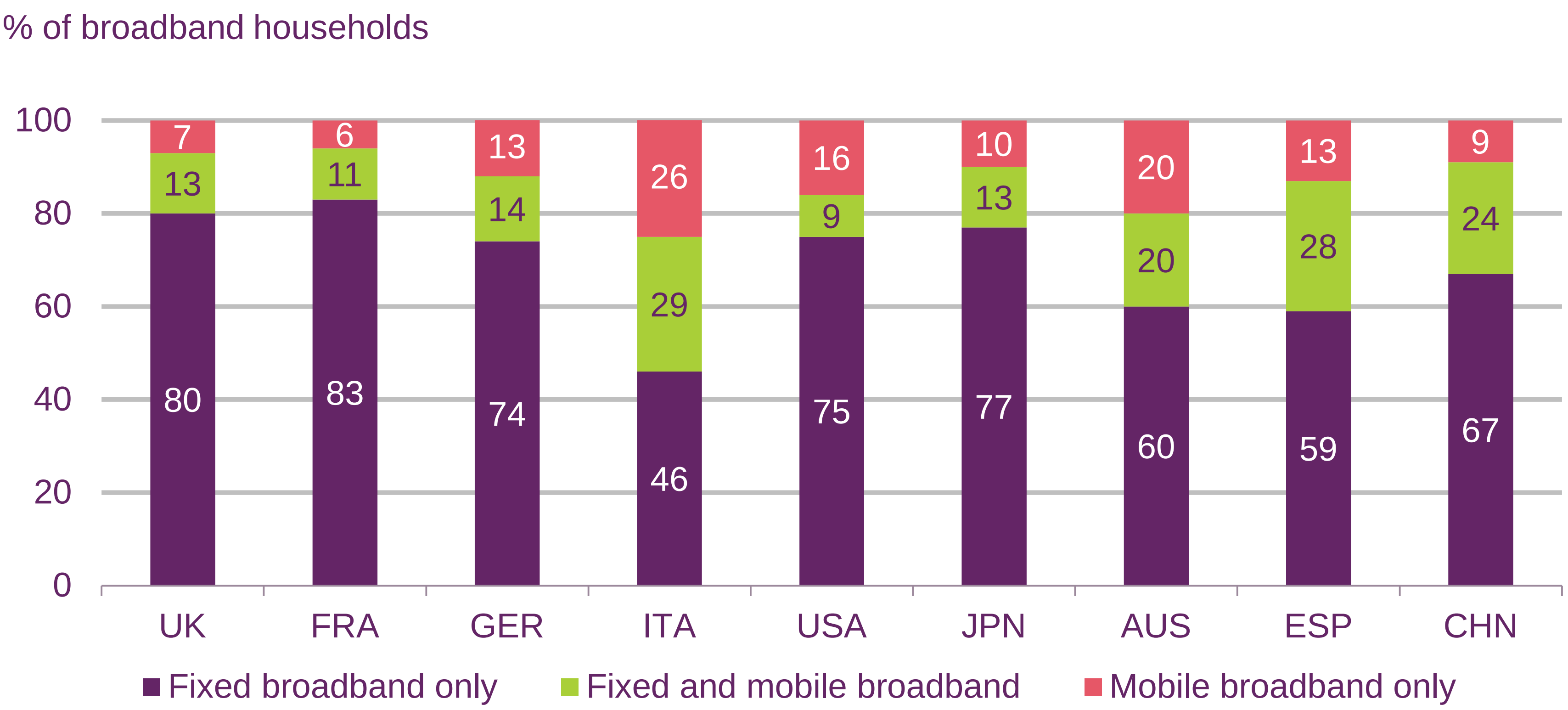
Figure 5.8

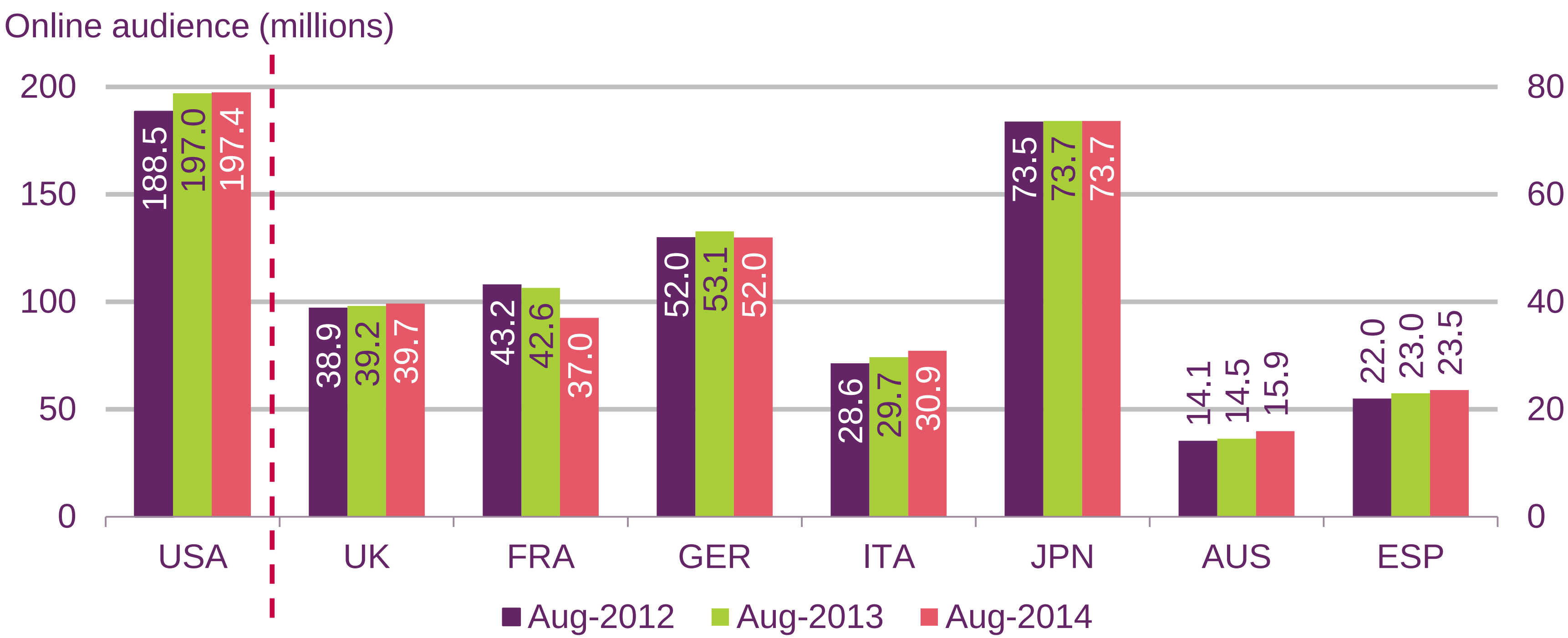
Take-up of fixed and mobile broadband among broadband households



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

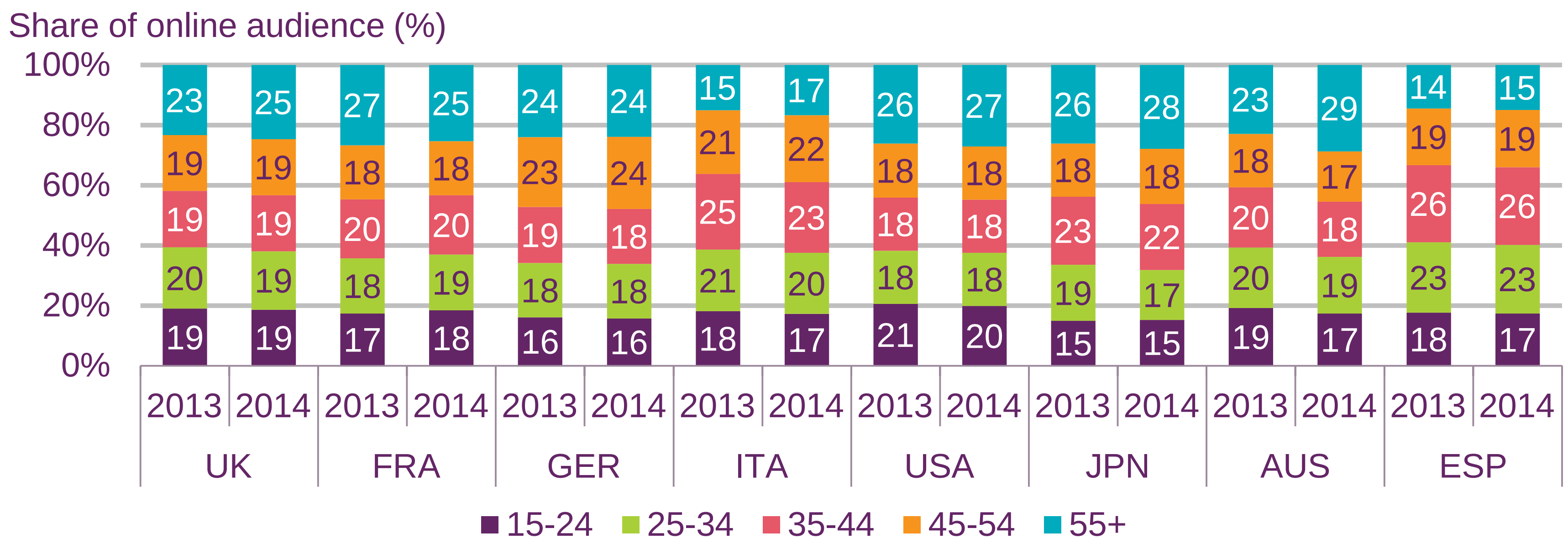
Active audience on laptop and desktop computers: 2012-14



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

Figure 5.10

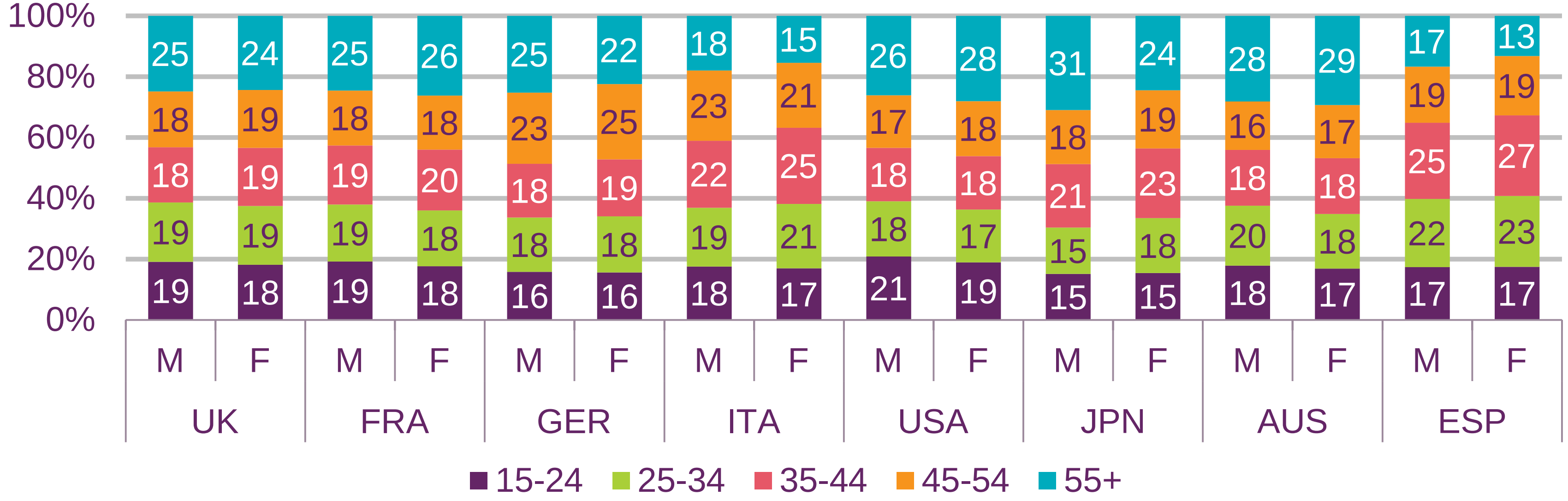
Active audience on a laptop or desktop computer, by age: 2013- 2014



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



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

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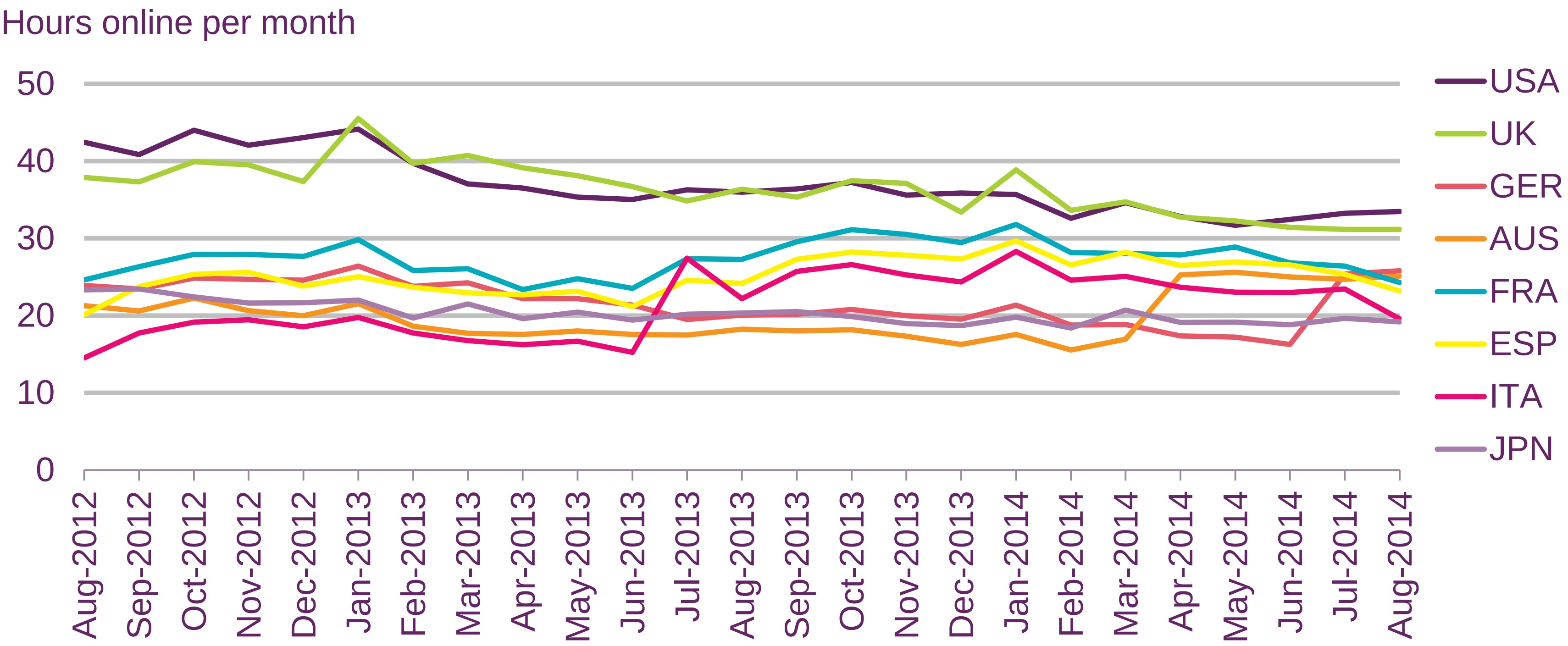
Figure 5.12

Average time spent browsing on a laptop or desktop computer

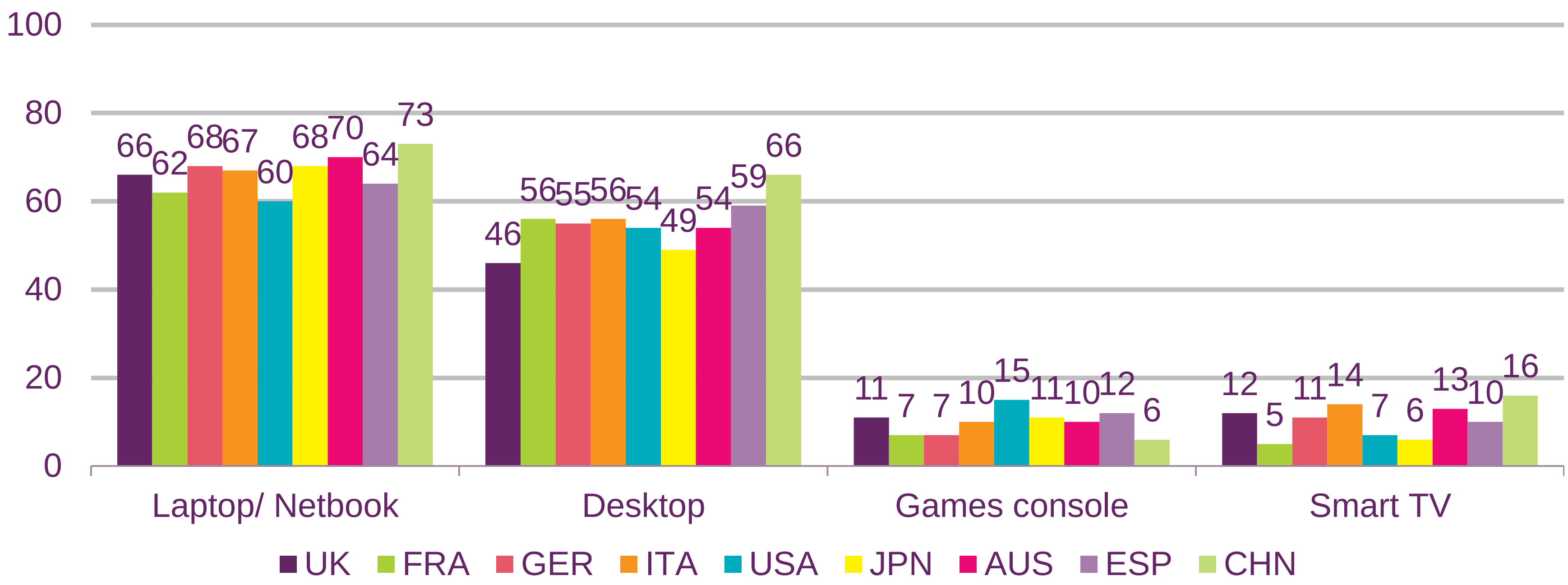


Source: comScore MMX, work and home panel, August 2012 to August 2014, persons 15+
Note: Comparisons between data before and after January 2013 in the UK, March 2013 in the US, and July 2013 in France, Spain and Italy should be treated with caution due to a change in panel weighting methodology

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?

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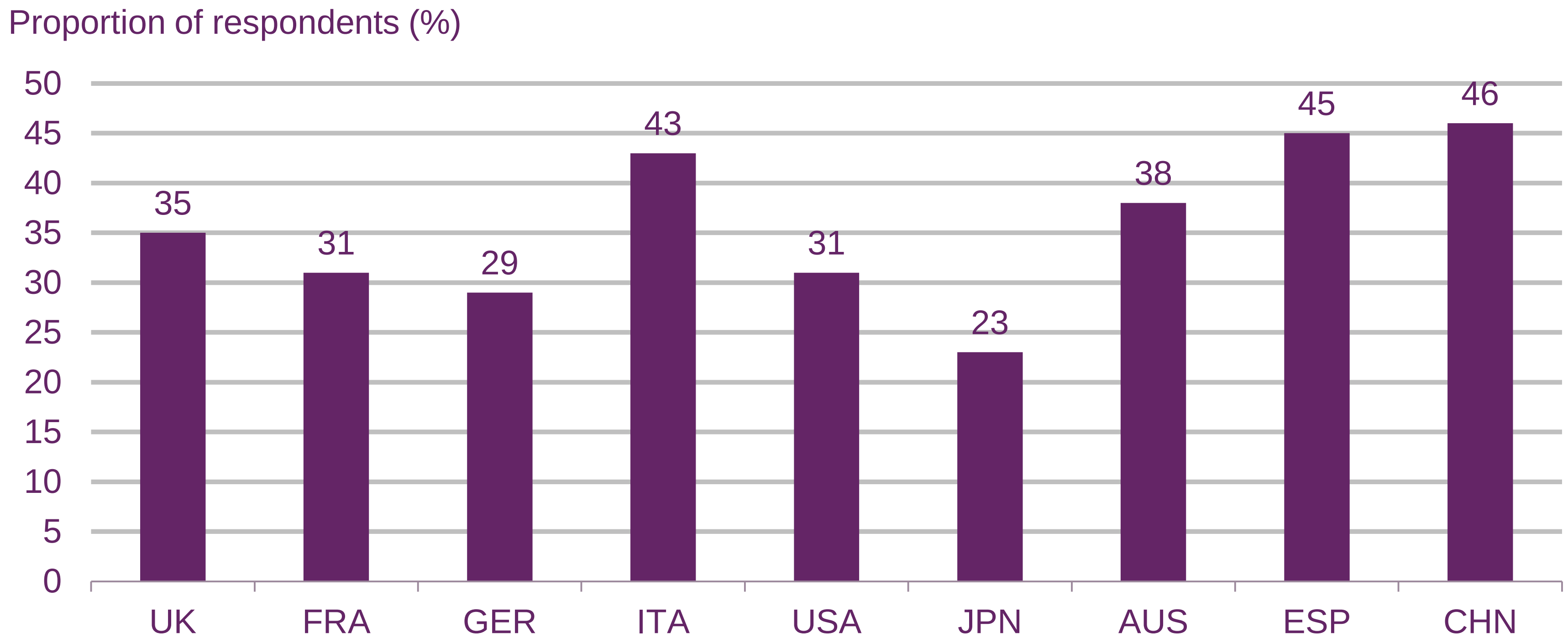
Figure 5.15

Use of tablets

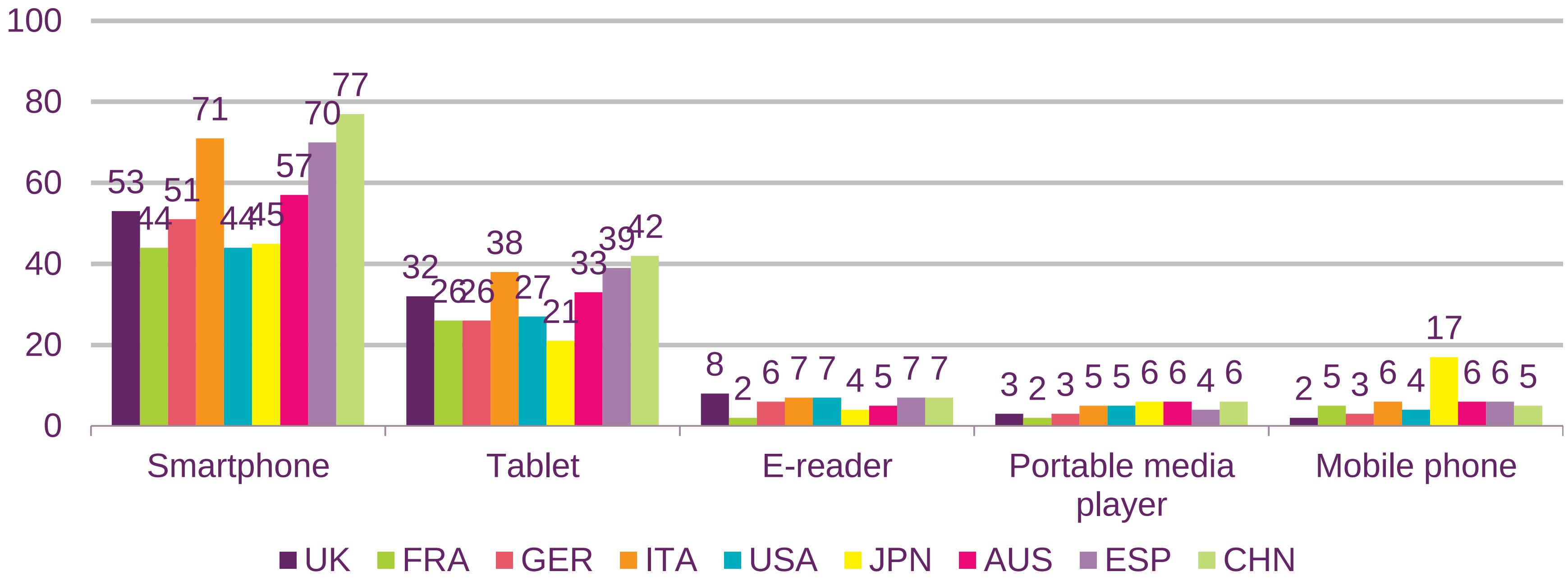


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q. 4a Which of the following devices do you personally use?

Figure 5.16

Portable devices used to access the internet

All respondents (%)

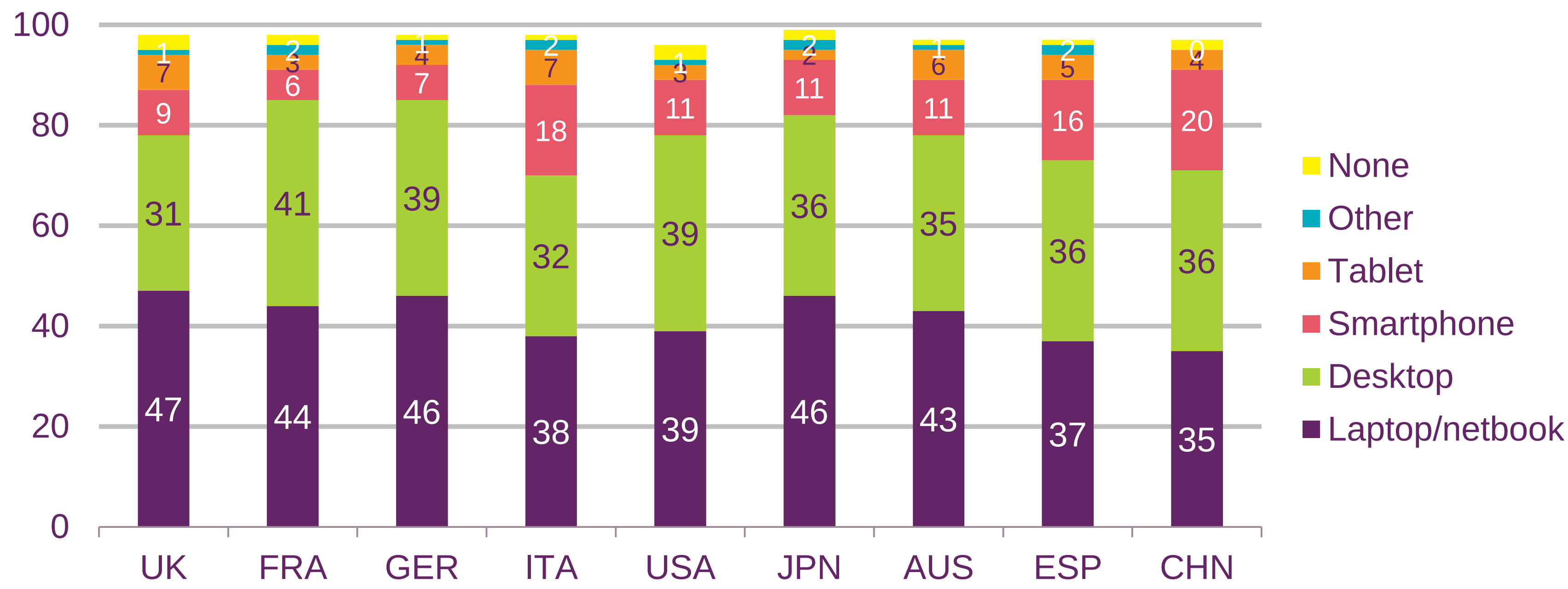


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q.7a Which of the following devices do you use to access the internet?

Figure 5.17

Most important device for accessing the internet

All respondents (%)

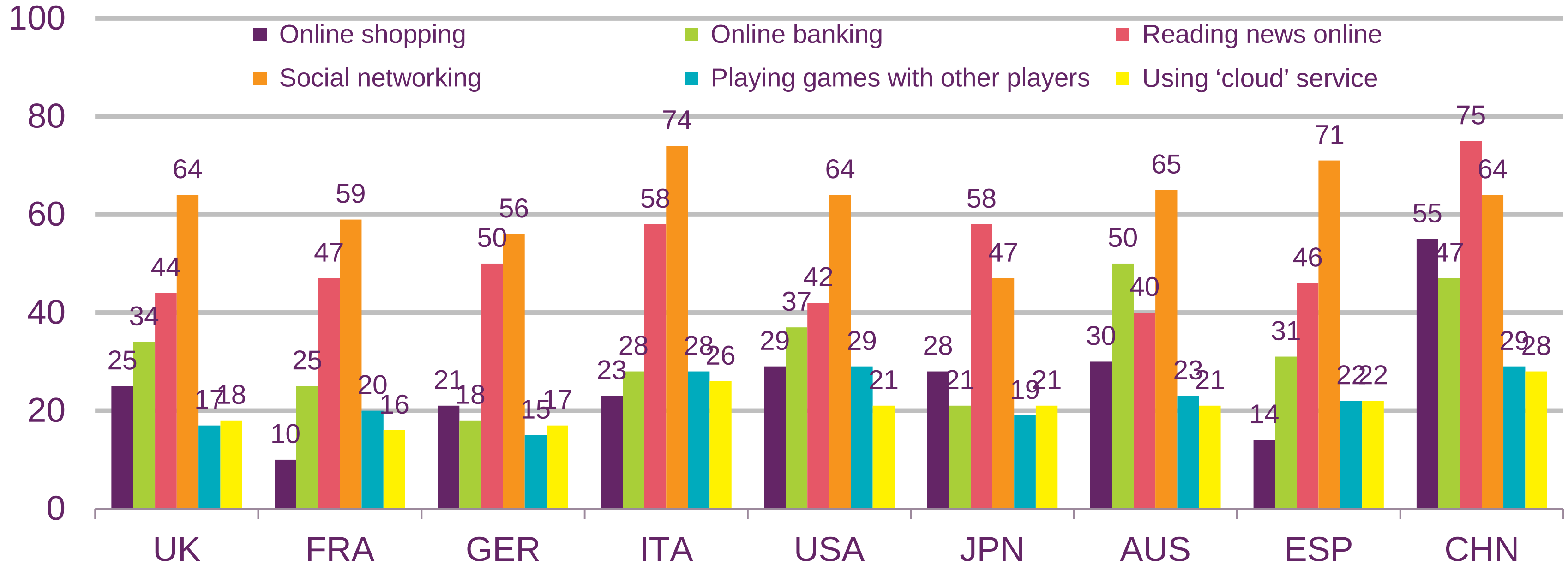


Source: Ofcom consumer research October 2014
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q.7b Which is the most important device that you use to connect to the internet (at home, or elsewhere)?

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

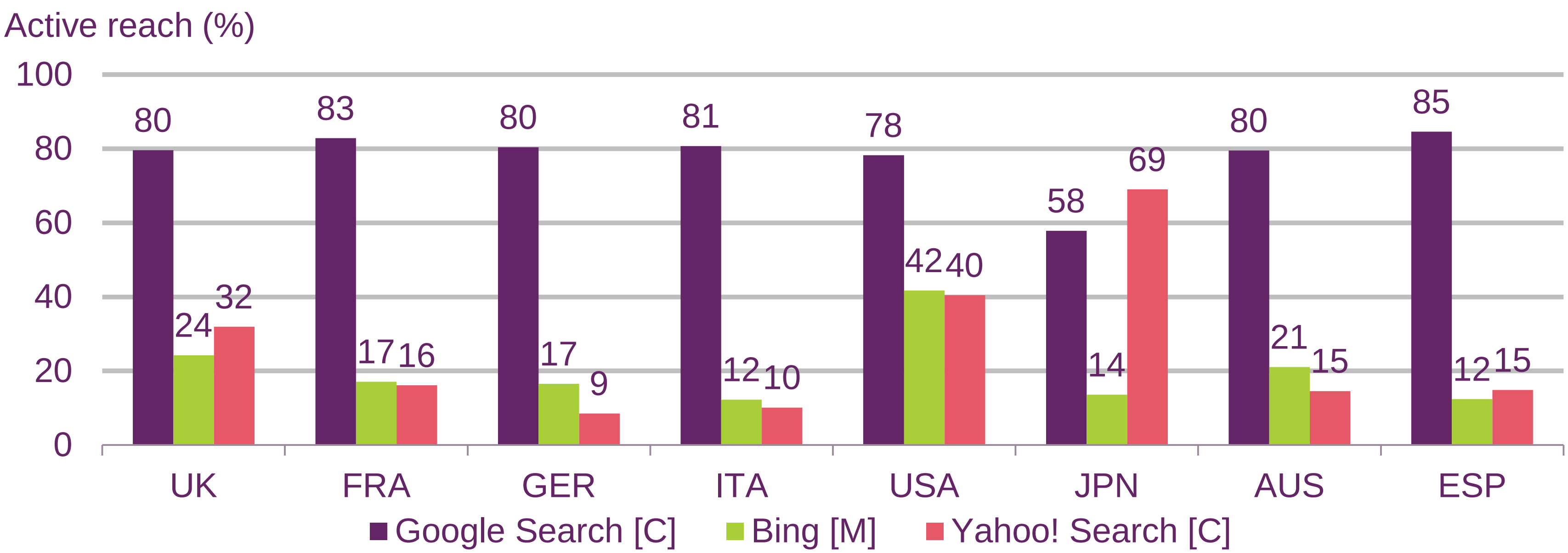
Top ten web properties accessed on a laptop and desktop computer, by country

	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 NBCUniversal	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+

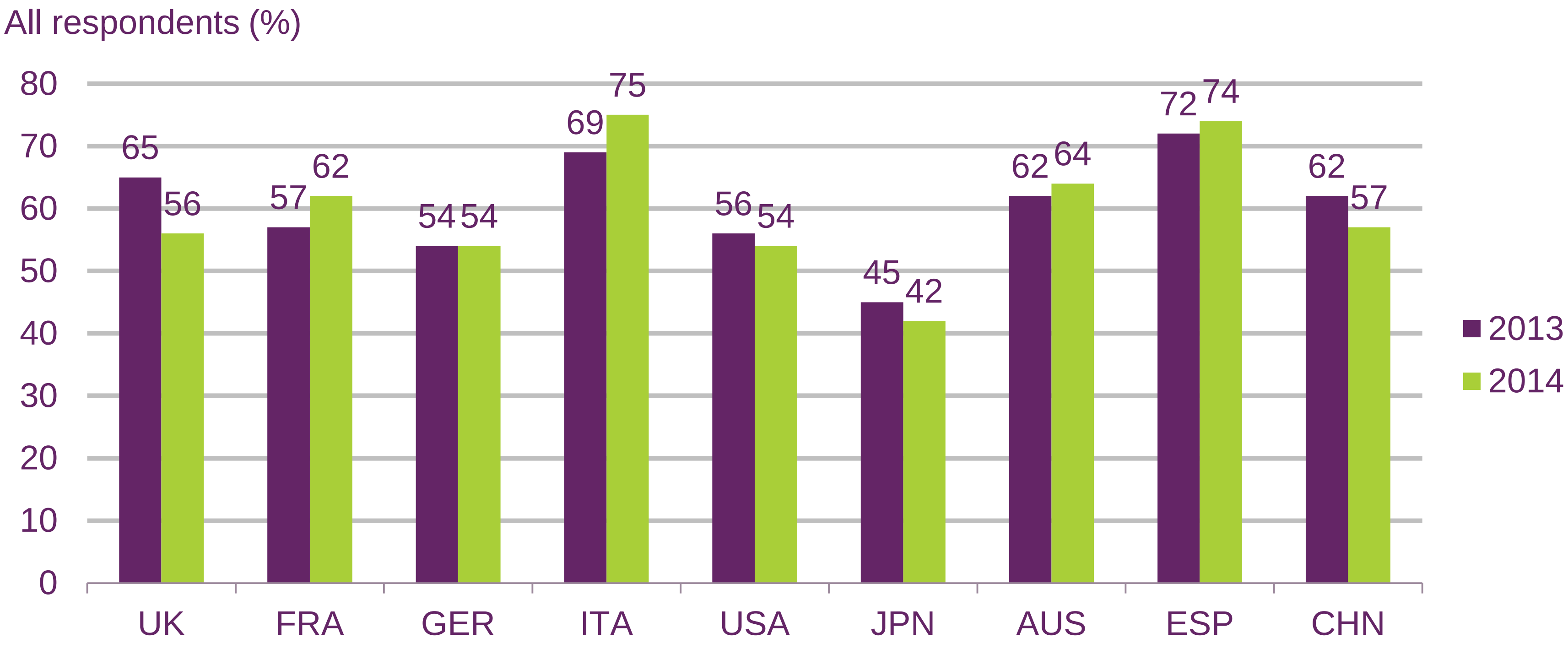
Figure 5.21

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

Country	1ST	2ND	3RD	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[1]	天気[2]	yahoo	モンスト[3]
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[4]	토렌트[5]	밍키넷[6]	밍키넷[7]
BRA	facebook	google	youtube	whatsapp
RUS	одноклассники[8]	вк[9]	яндекс[10]	украина[11]
IND	facebook	india	fb	matka
CHN	百度[12]	qq	手机[13]	helloworld
NGA	nigeria	news	facebook	ebola

Figure 5.22

Weekly access of social networks

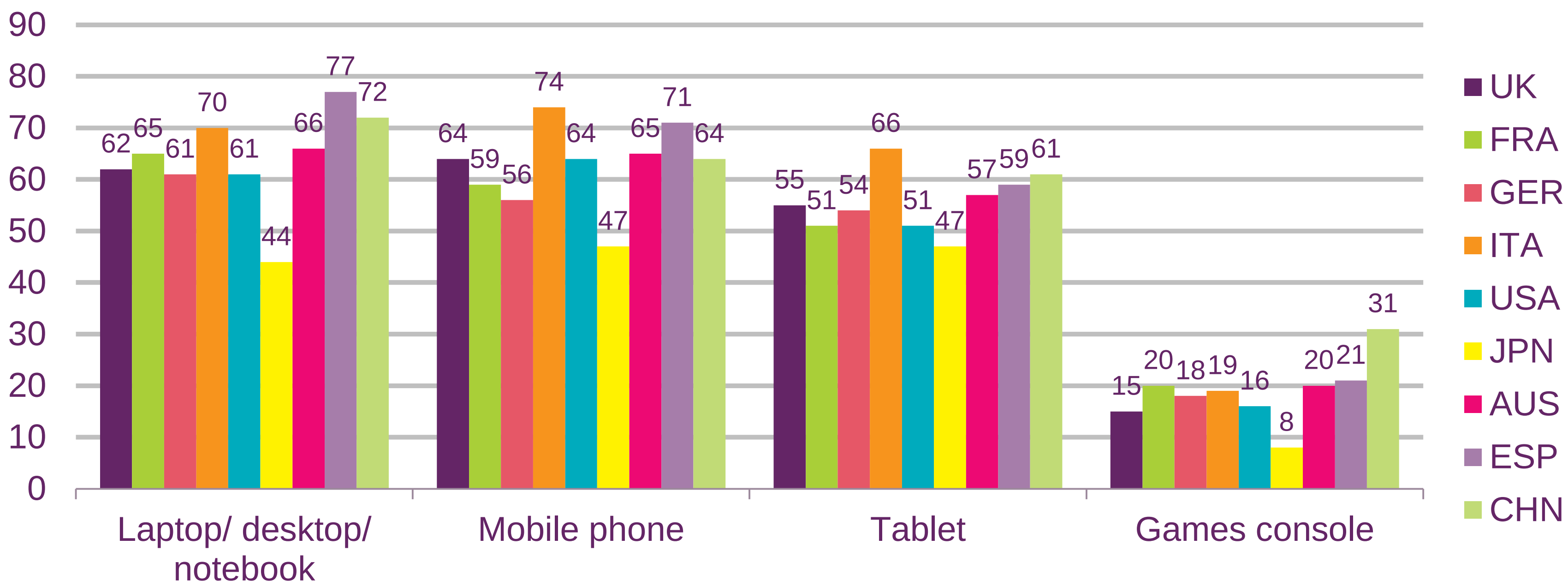


Source: Ofcom consumer research October 2014 and September 2013.
Base (2014): All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010.
Q.8 Which, if any, of the following activities do you use your internet connection for at least once a week?

Figure 5.23

Accessing social networks, by device ownership

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

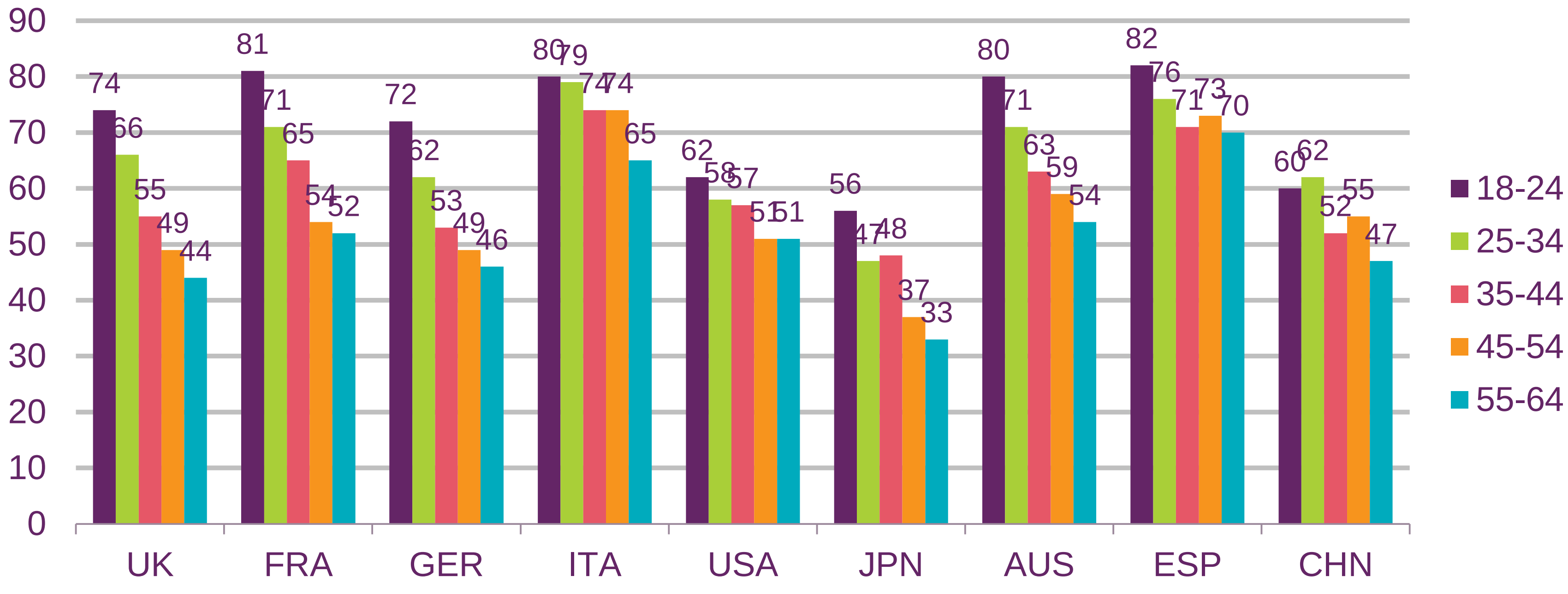


Source: Ofcom consumer research October 2014
Base: All respondents who access internet with each type of device - UK=905/540/318/99*, FRA=953/469/270/67*, GER=949/531/263/69*, ITA=902/762/384/97*, USA=907/443/274/131, JPN=934/566/209/103, AUS=944/579/325/87*, ESP=903/742/394/116, CHN=947/808/446/67*
(*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

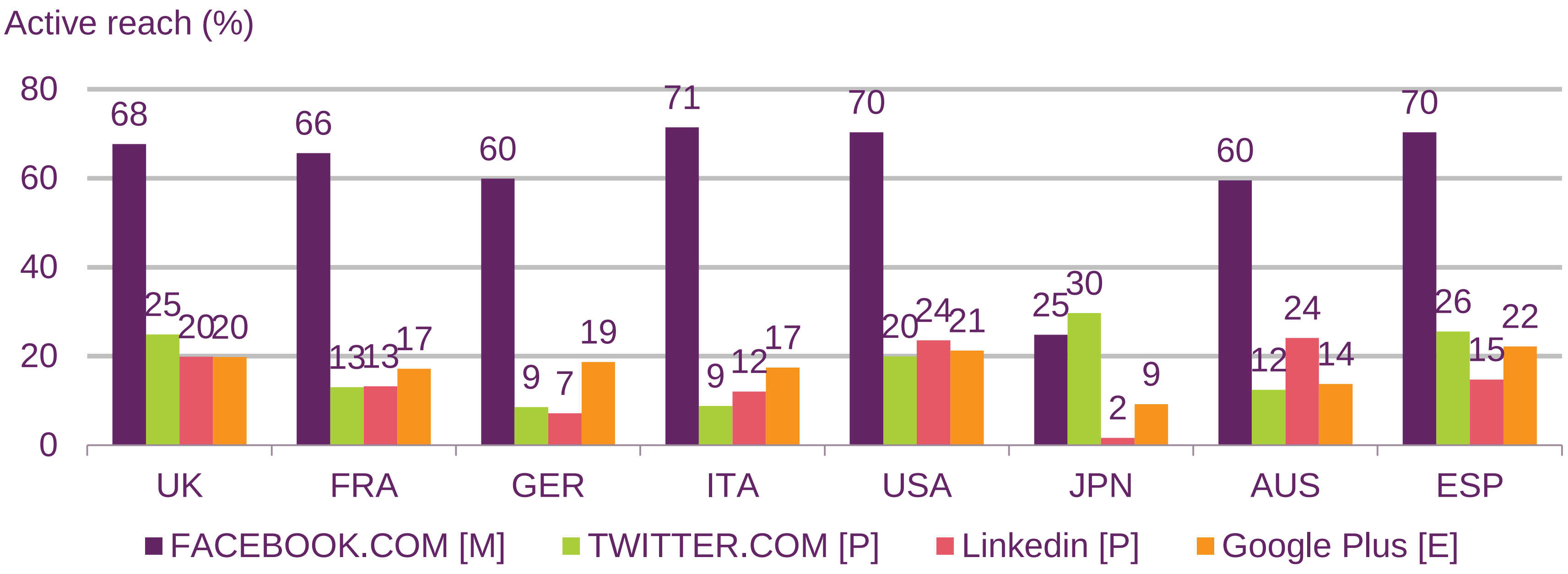
All respondents



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

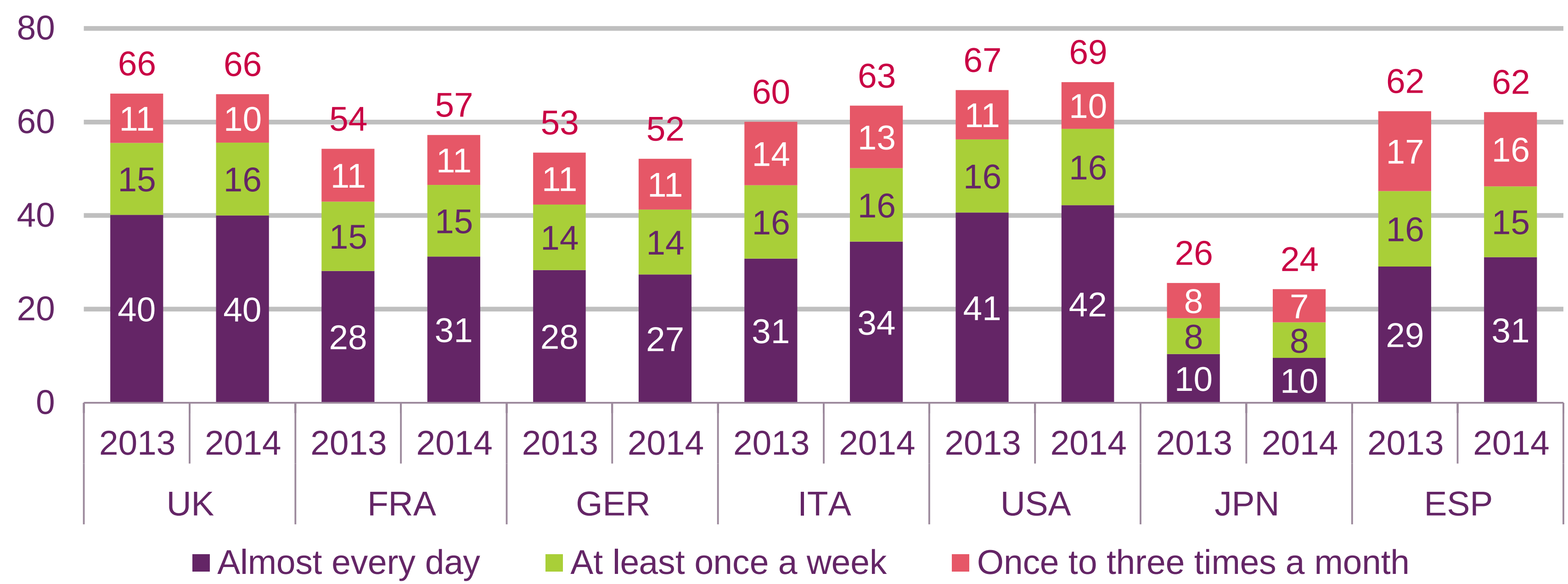


Source: comScore MMX, home and work panel, August 2014, persons 15+

Figure 5.26

Monthly accessing of social networks on mobile phones

Proportion of mobile internet users (%)

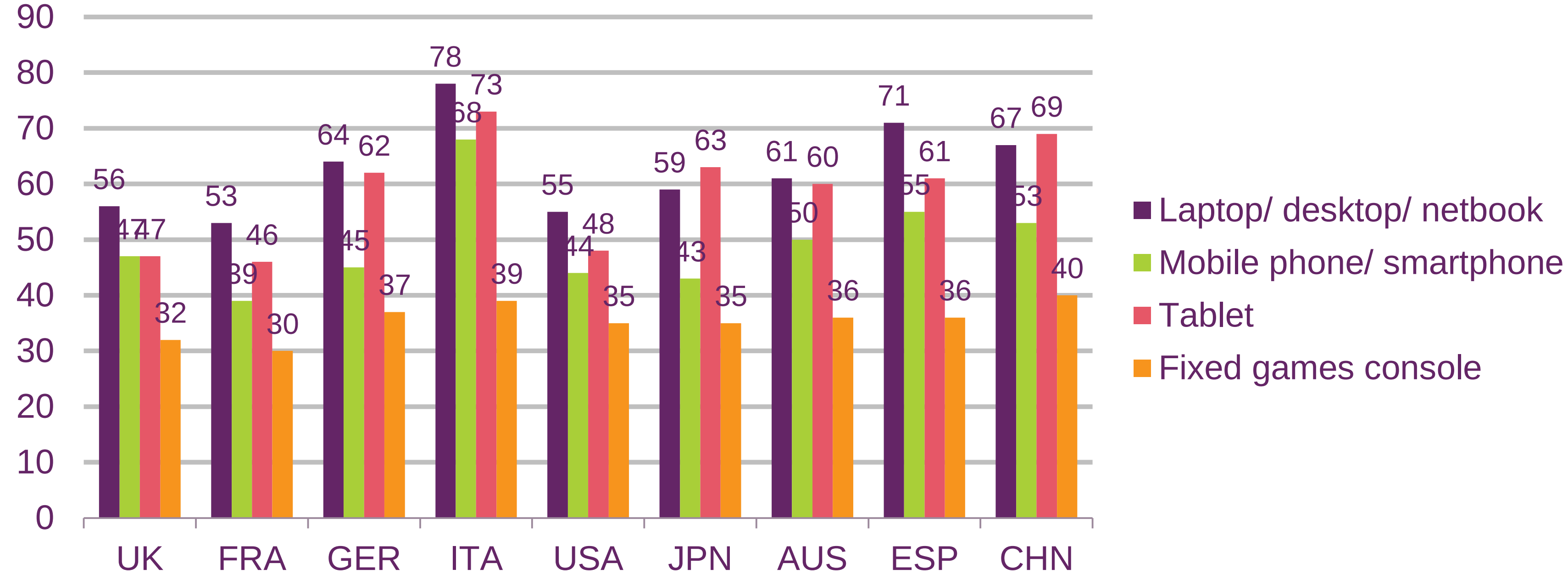


Source: comScore MobiLens, August 2012 (three-month average) and August 2013 (three-month average), mobile internet users aged 13+

Figure 5.27

Access of online video clips by device ownership

All respondents who access internet with each device (%)

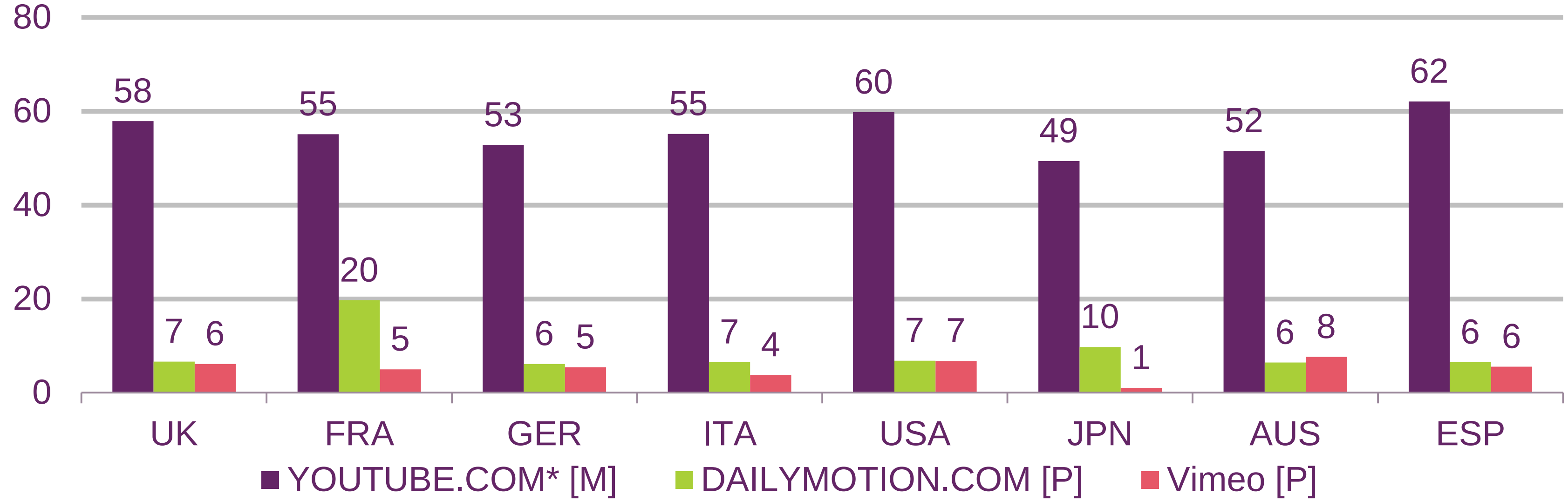


Source: Ofcom consumer research October 2014
Base: All respondents with each device, laptop/desktop/netbook 902-953 in each market, mobile phone/ smartphone 443-808 in each market, tablet computer 209-446 in each market, games console attached to TV 63-131 in each market.
Q.9c What sorts of video content 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

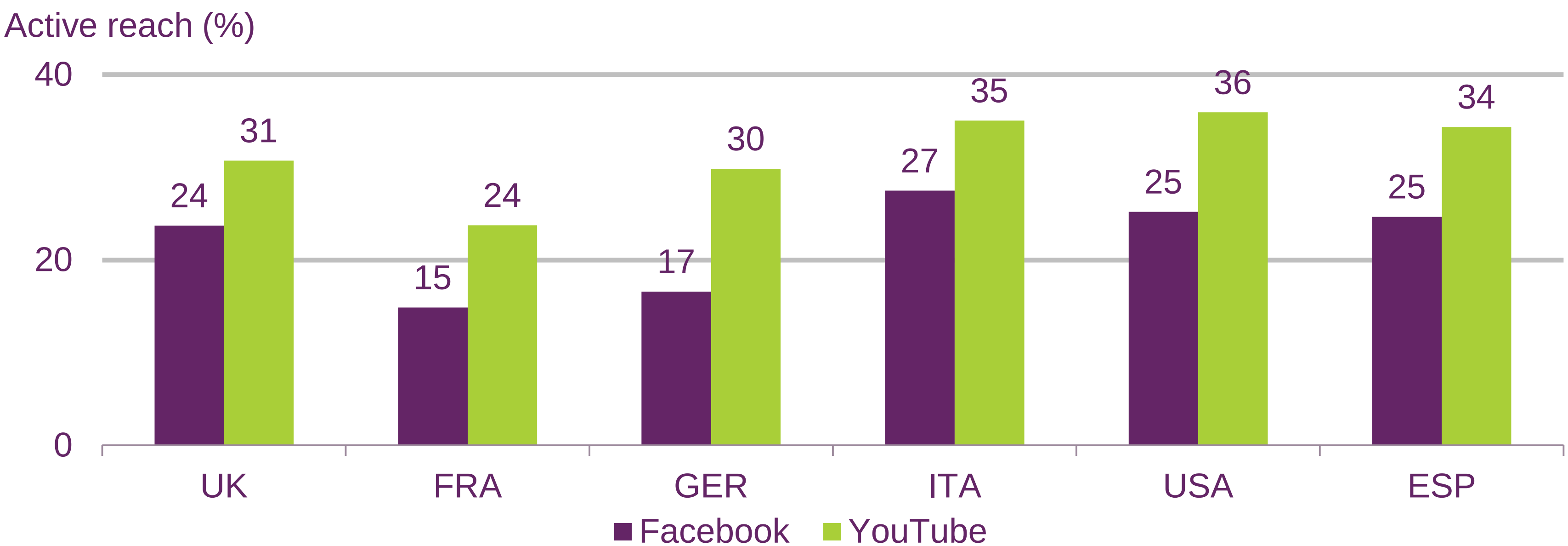
Active reach (%)



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

Figure 5.29

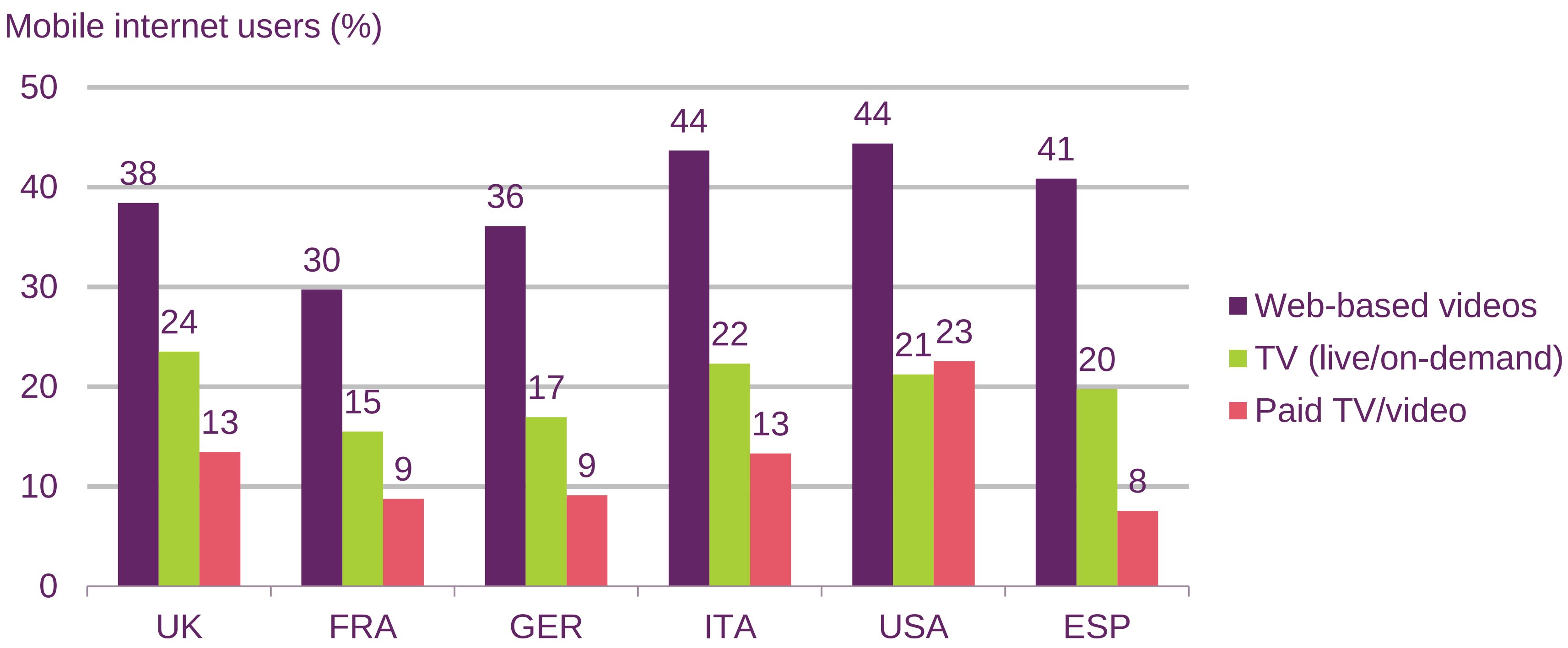
Active reach of selected websites for viewing online video on mobile



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

Figure 5.30

Type of TV/Video service accessed on mobile

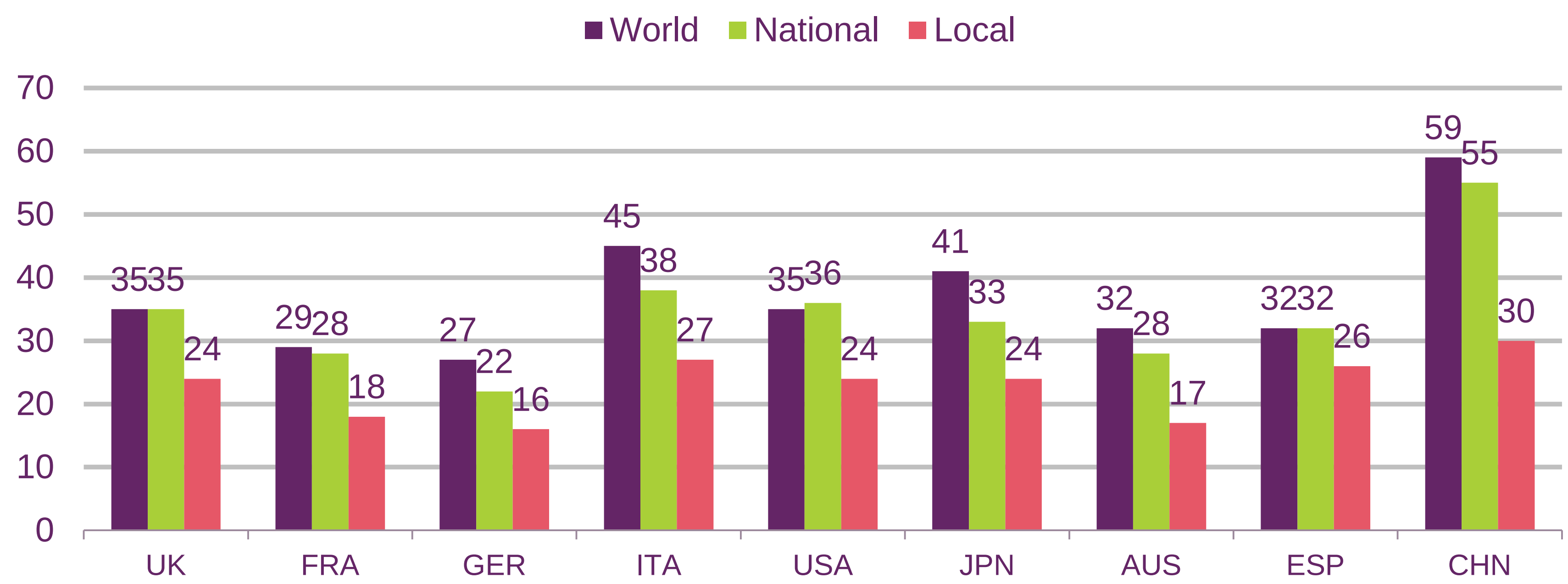


Source: comScore MobiLens, August 2014 (three-month average), mobile internet users aged 13+

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?

6. Telecoms and networks

Figure 6.1

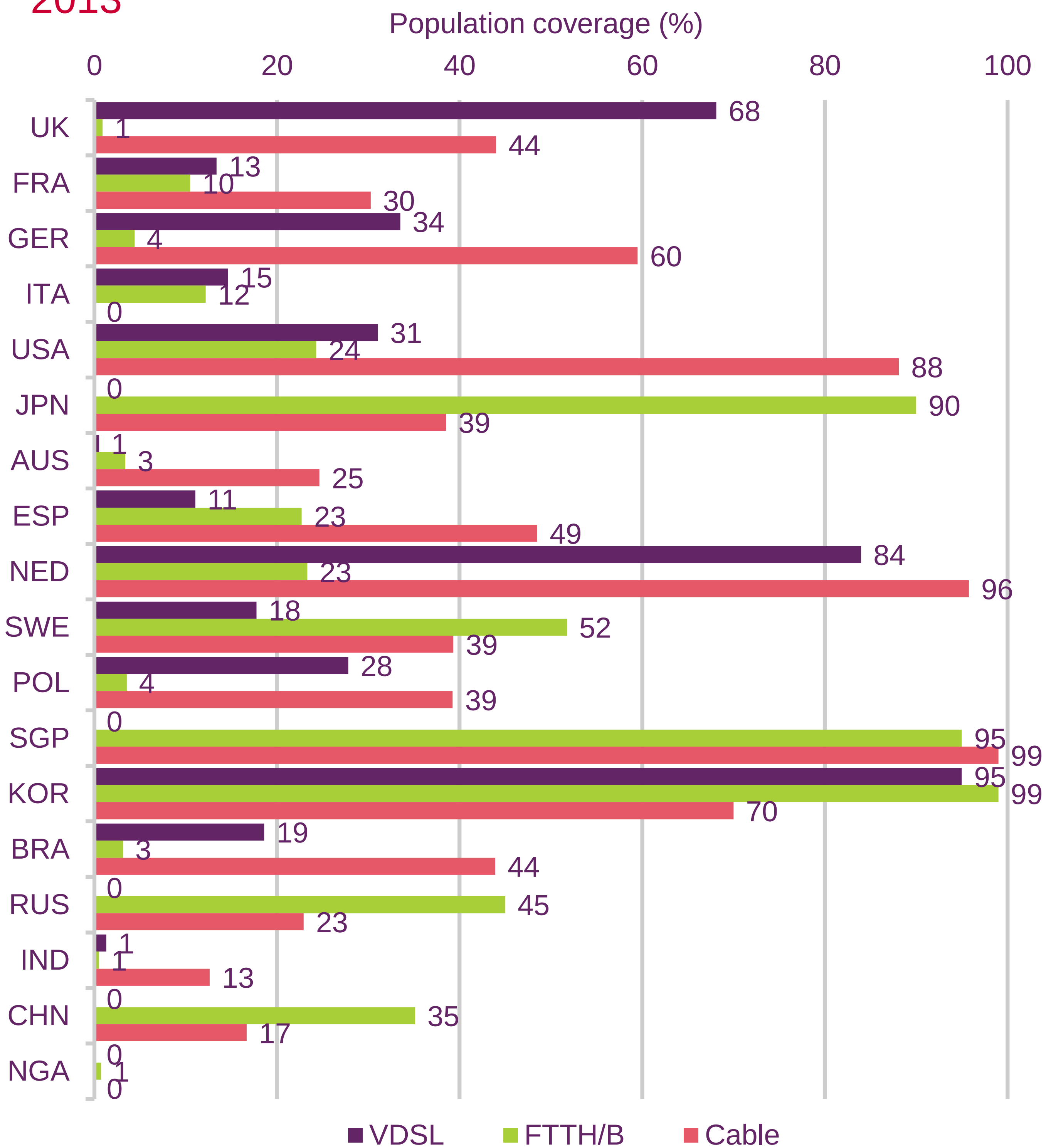
Key telecoms indicators: 2013

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Telecoms service revenues (£bn)	29	21	27	19	179	85	16	16	8	5	6	3	19	31	22	15	106	7
Monthly telecoms revenues per capita (£)	37	26	27	26	47	56	58	28	37	39	14	51	33	13	13	1	7	3
Fixed voice connections per 100 population (inc. managed VoIP)	59	60	45	37	42	45	44	41	43	41	18	36	55	22	29	2	20	0
Monthly outbound fixed minutes per capita	137	131	172	92	124	87	144	94	100	111	25	85	108	70	84	5	9	0
Mobile connections per 100 population	130	117	140	159	106	114	131	107	128	148	148	156	113	137	169	71	91	73
Mobile data connections per 100 population	77	64	51	74	100	113	136	79	60	133	110	153	110	76	61	18	38	40
4G as % of all mobile connections	4	4	5	3	23	22	20	3	4	11	2	24	51	0	1	0	0	0
Monthly outbound mobile minutes per capita	175	175	117	205	339	132	149	126	115	222	165	279	203	181	269	127	178	67
Average mobile data volumes per person (Mbyte)	251	192	271	469	794	1101	763	239	421	2,305	261	439	1,369	102	135	8	58	65
Fixed broadband connections per 100 population	36	38	34	23	29	35	28	26	41	34	21	30	37	10	18	1	15	0
Average monthly fixed broadband data volumes per person (Gbyte)	11	10	9	6	15	27	8	7	15	24	4	20	43	2	3	0	2	0
NGA connections per 100 population	11	3	9	1	20	25	9	7	23	20	7	19	33	4	11	0	4	0
Dedicated data-only mobile broadband connections per 100 population	8	6	10	13	8	10	26	4	7	23	11	3	5	3	13	0	1	3
Managed VoIP connections per 100 population	7	36	16	5	15	20	3	6	31	16	3	8	19	3	1	0	1	0

Source: IHS / industry data / Ofcom

Figure 6.2

Availability of NGA networks by technology and country: 2013



Source: IHS

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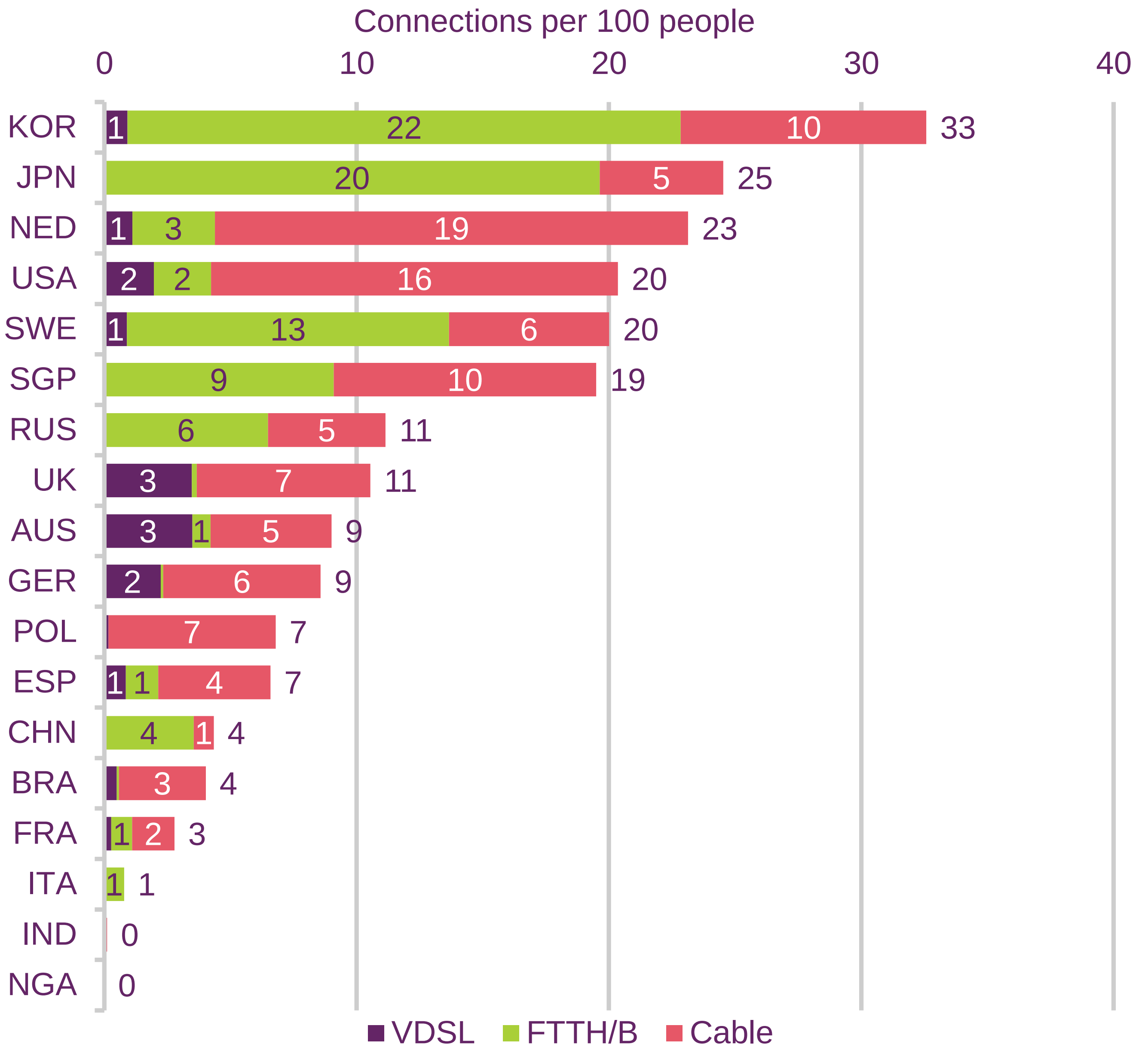
Figure 6.3

NGA broadband connections per 100 people, by technology: end 2013

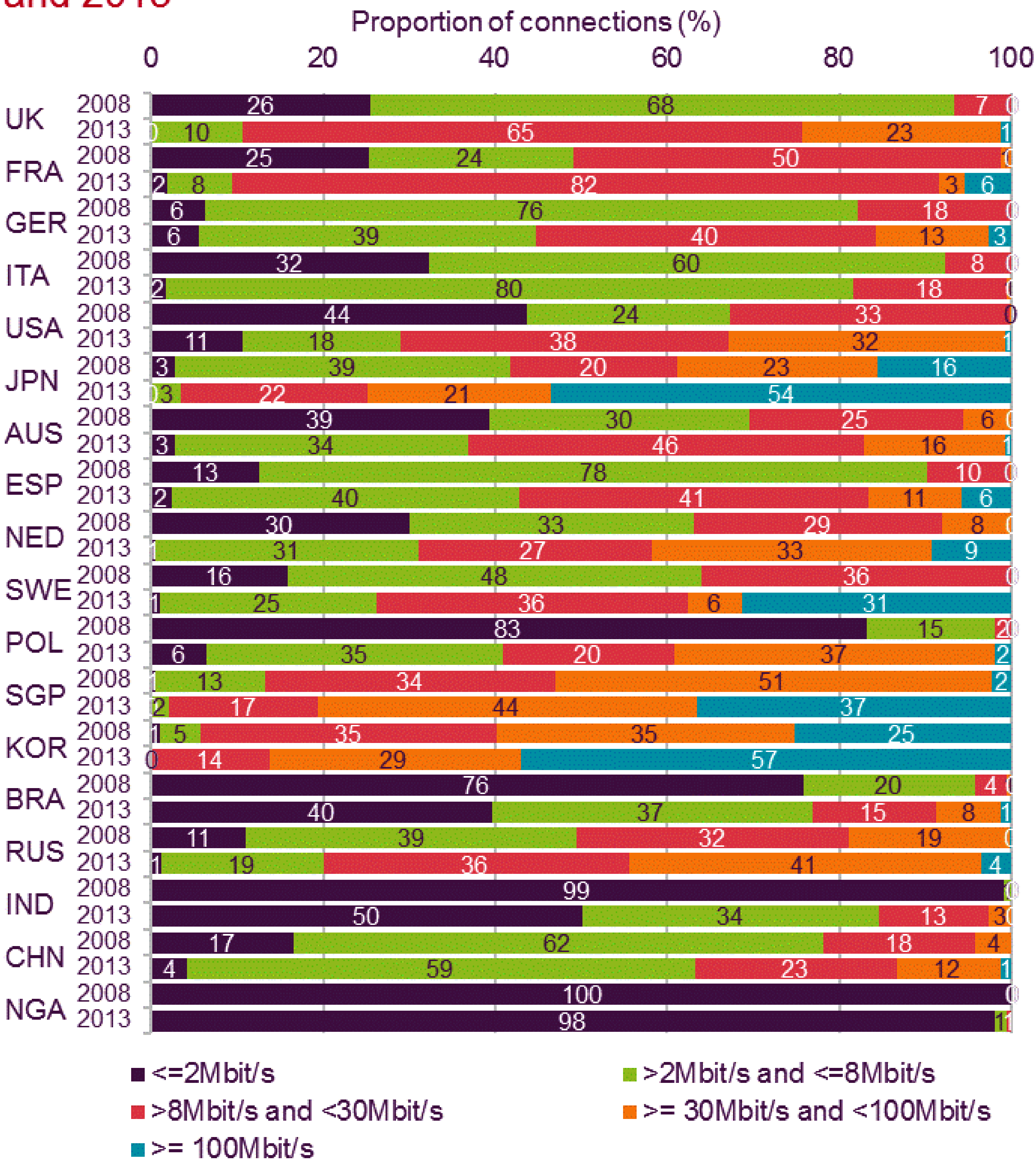


Source: IHS

Note: NGA on the left hand side of the chart is the country code for Nigeria, and does not refer to next generation access technologies.

Figure 6.4

Fixed broadband connections, by headline speed: 2008 and 2013

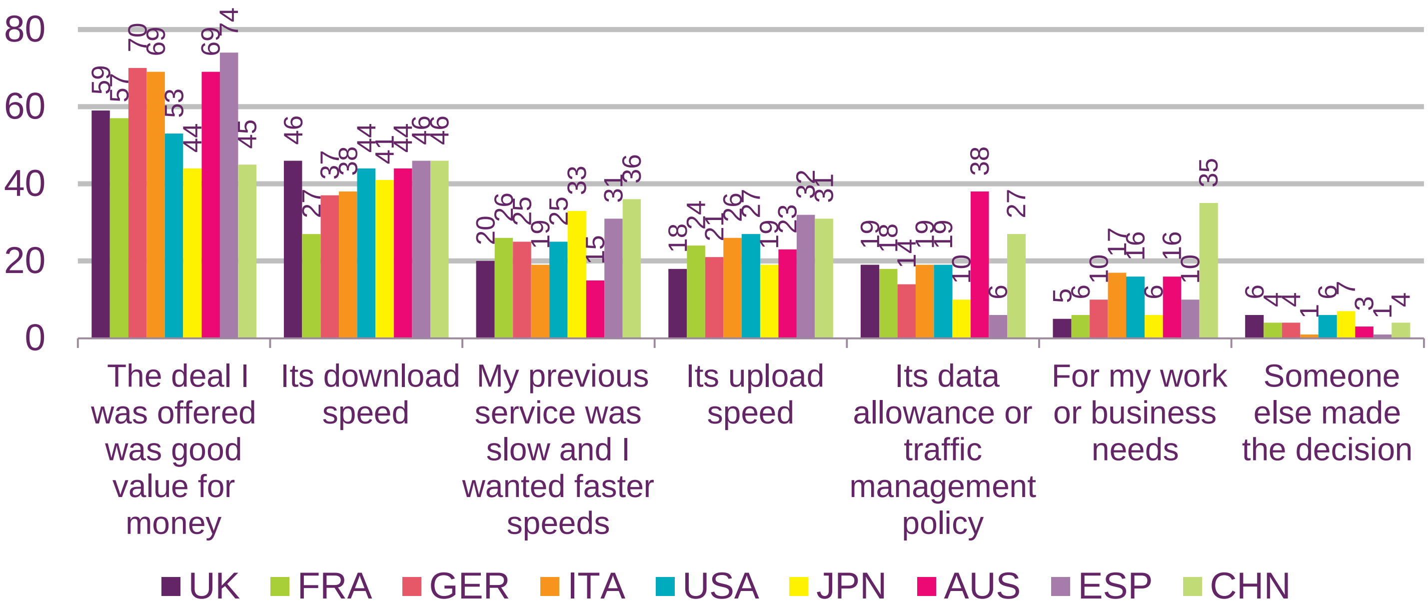


Source: IHS / Ofcom / operator data

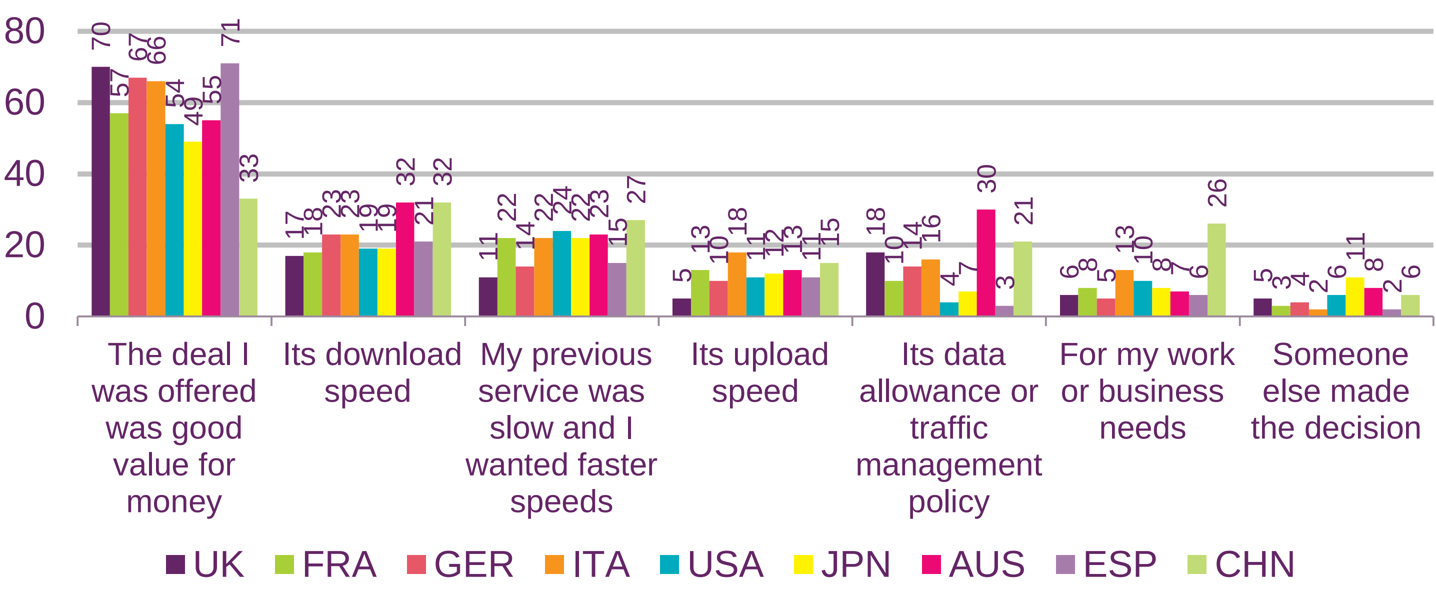
Figure 6.5

Reason for choosing current fixed broadband service

% of respondents with broadband with a headline speed of 30Mbit/s or more



% of respondents with broadband with a headline speed of less than 30Mbit/s



Source: Ofcom consumer research October 2014
Base: All respondents with superfast broadband, UK=238, FRA=190, GER=254, ITA=114, USA=141, JPN=314, AUS=140, ESP=229, CHN=240
Base: All respondents with non-superfast broadband, UK=249, FRA=199, GER=269, ITA=304, USA=137, JPN=107, AUS=122, ESP=359, CHN=534
Q.29 Why did you choose your home broadband service?

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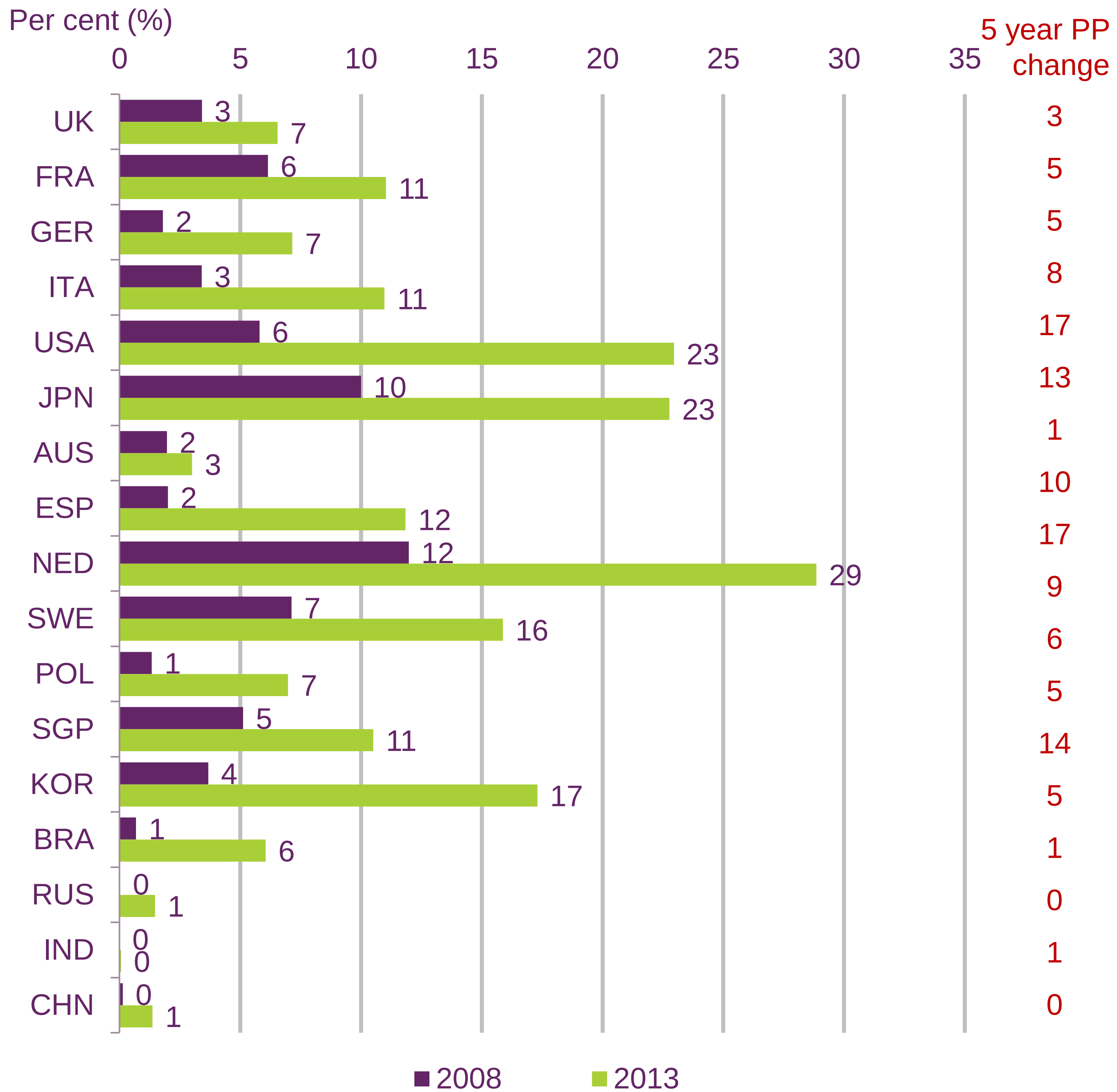
Figure 6.6

Managed VoIP revenues as a proportion of fixed voice revenues: 2008 and 2013



Source: IHS / industry data / Ofcom

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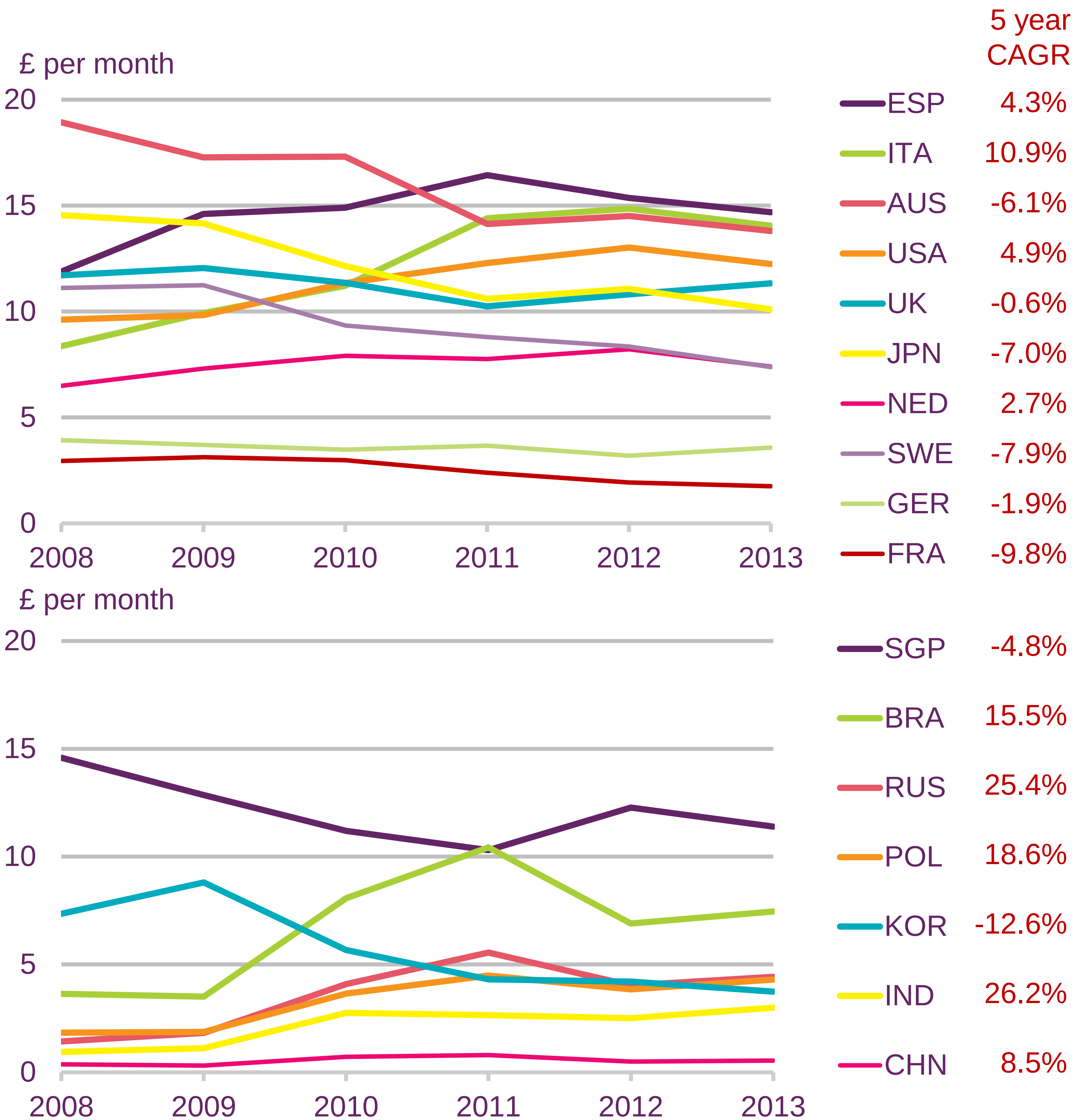
Figure 6.7

Monthly managed VoIP revenue per connection



Source: IHS / industry data / Ofcom

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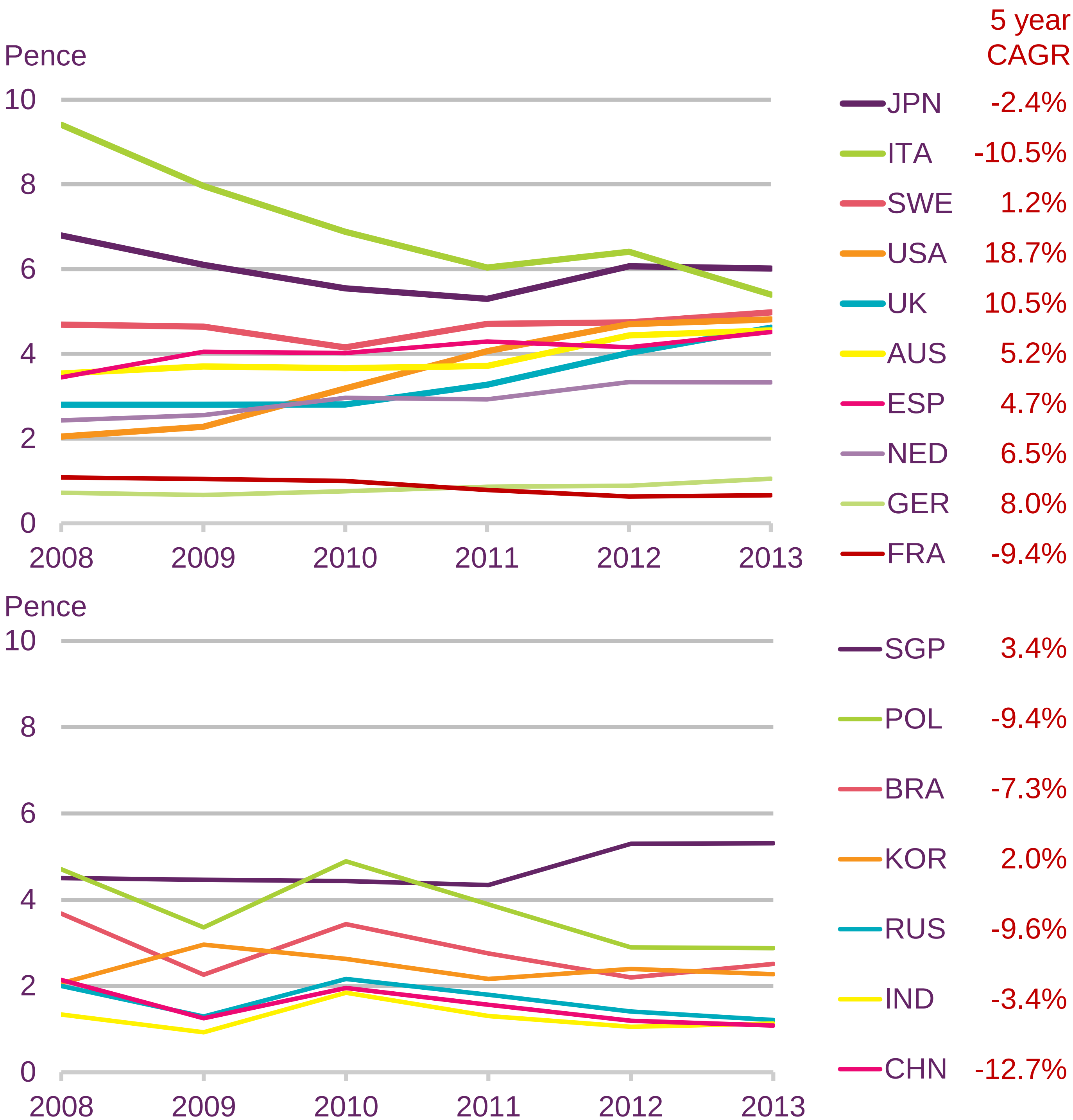
Figure 6.8

Average price per managed VoIP minute



Source: IHS / industry data / Ofcom

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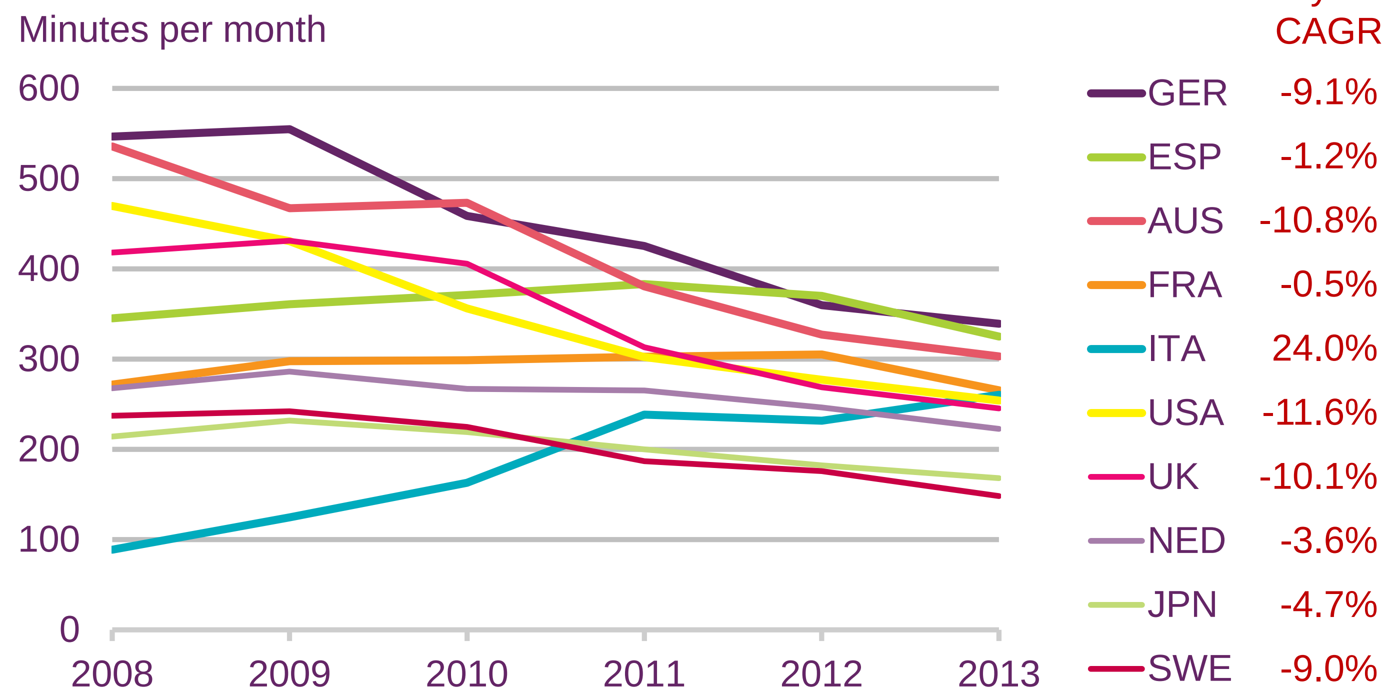
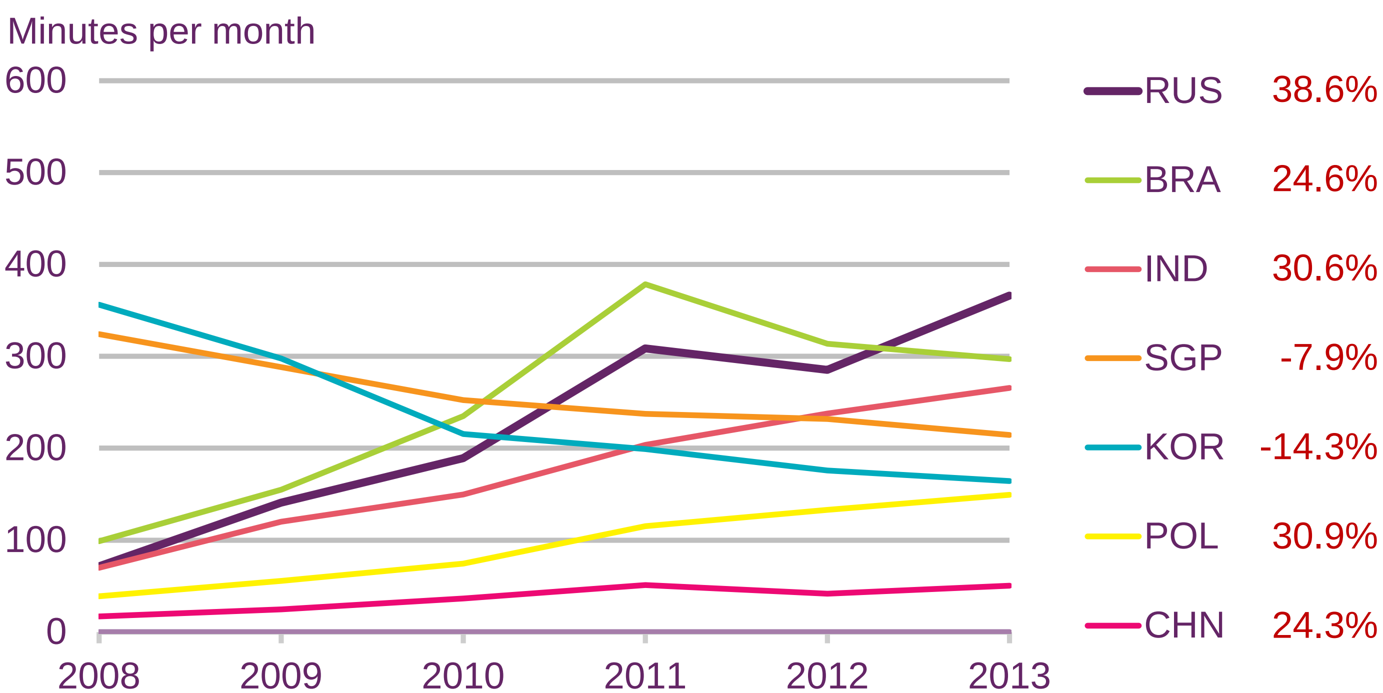
Figure 6.9

Average monthly managed VoIP call minutes per connection





Source: IHS / industry data / Ofcom

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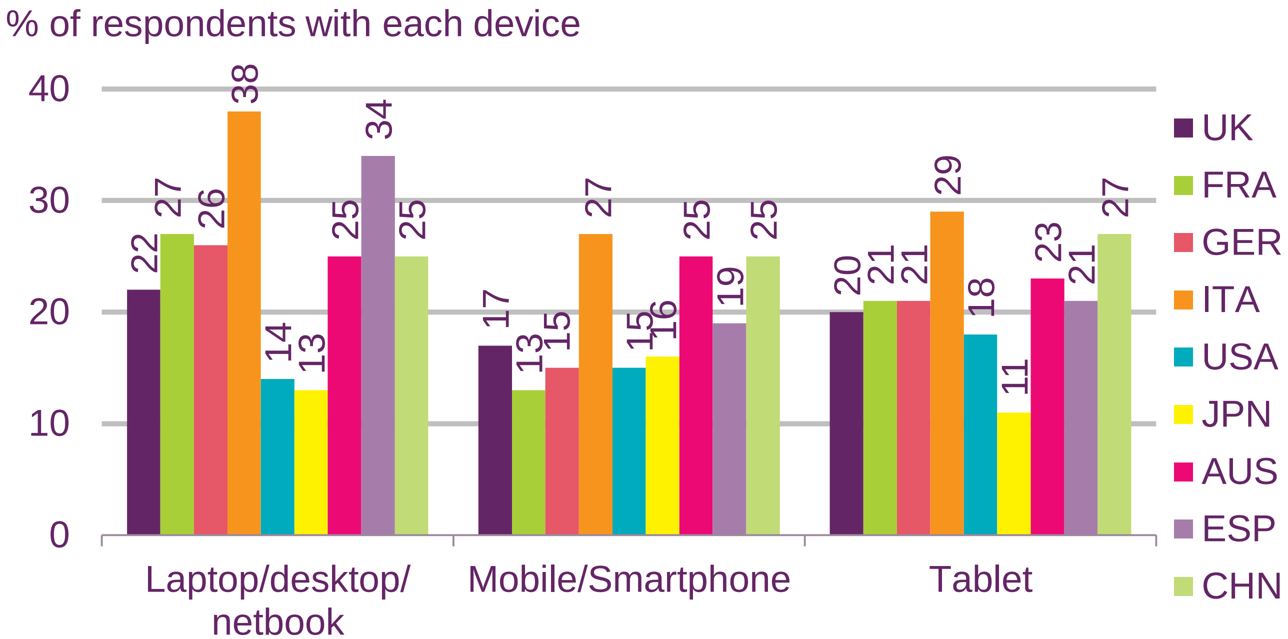
Figure 6.10

VoIP use by device type



Source: Ofcom consumer research October 2014
Base: All who own each device, UK=905/540/318, FRA=953/469/270, GER=949/531/263, ITA=902/762/384, USA=907/443/274, JPN=934/566/209, AUS=944/579/325, ESP=903/742/394, CHN=947/808/446
Q.9B. Which, if any, of the following ways of communicating over the internet do you use each of your devices for?

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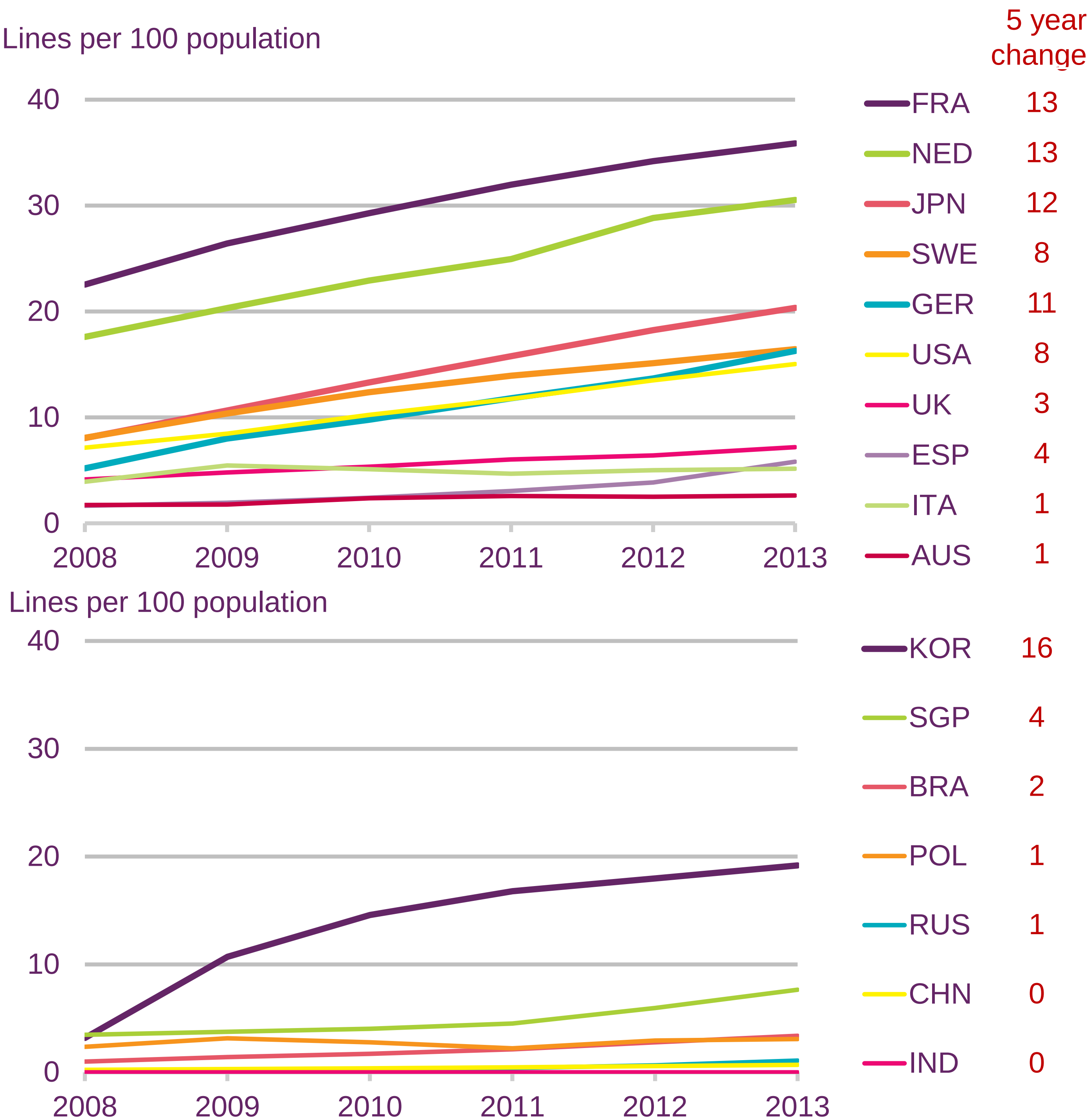
Figure 6.11

Managed VoIP connections per 100 people



Source: IHS / industry data / Ofcom

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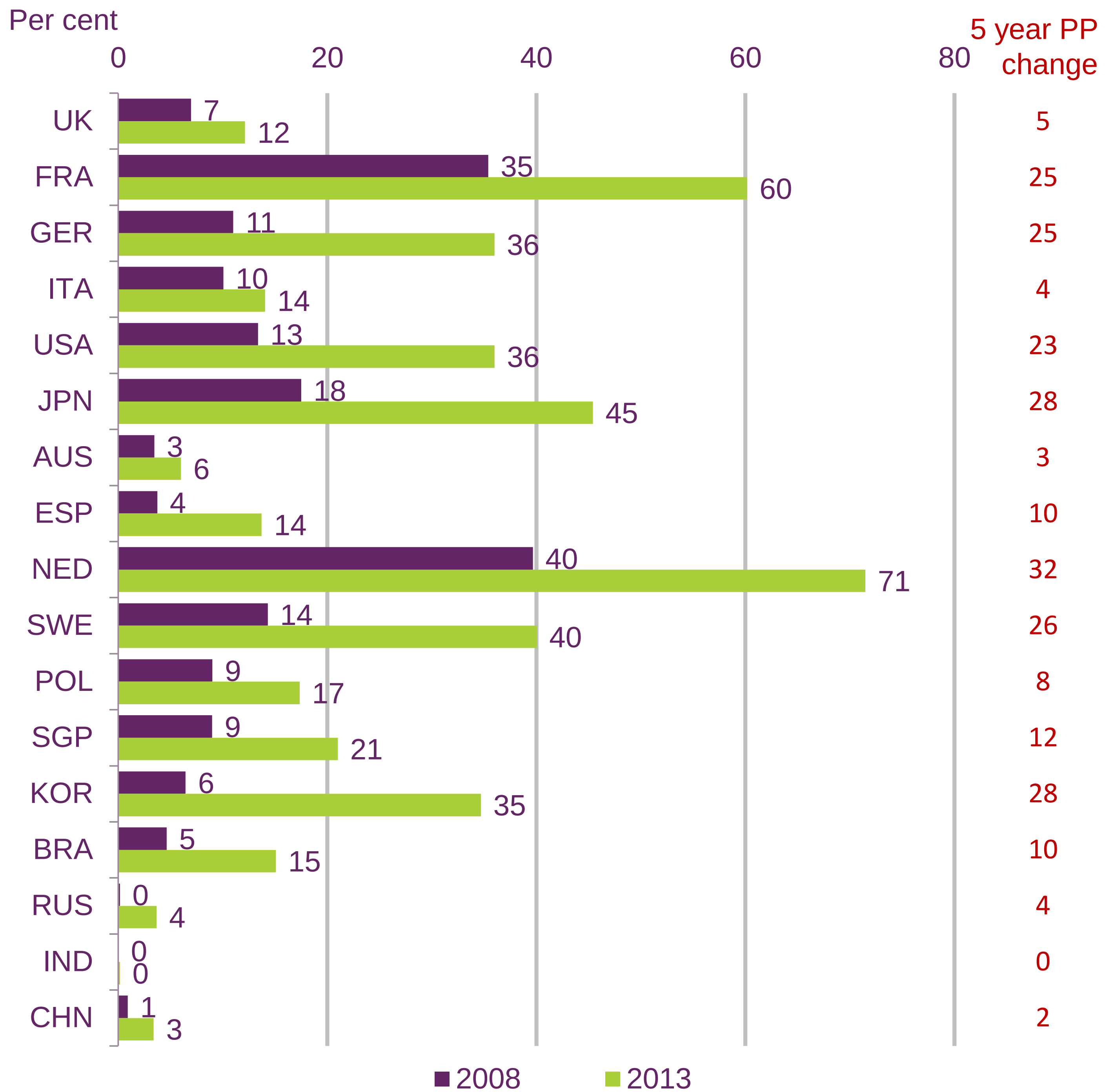
Figure 6.12

Managed VoIP connections as a proportion of total voice connections



Source: IHS / industry data / Ofcom

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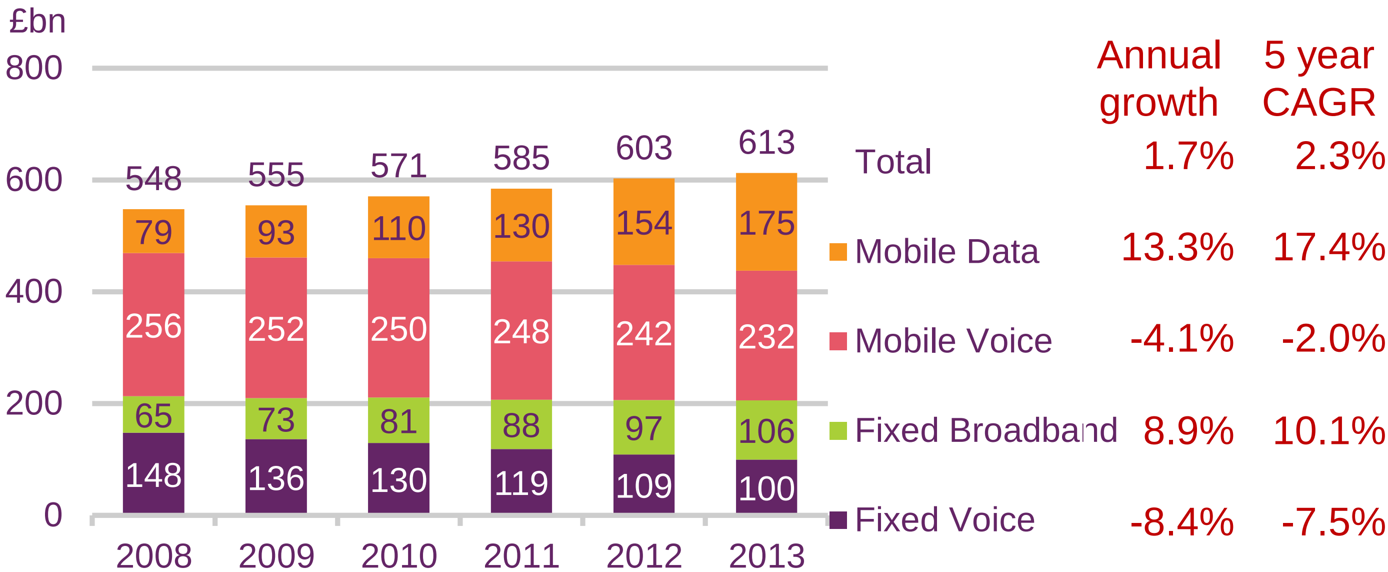
Figure 6.13

Total comparator country retail telecoms revenue, by sector: 2008 to 2013



Source: IHS / industry data / Ofcom
Note: Fixed voice revenues include managed VoIP revenues; voice revenues include access/line rental revenues and may include revenues relating to bundled data services.

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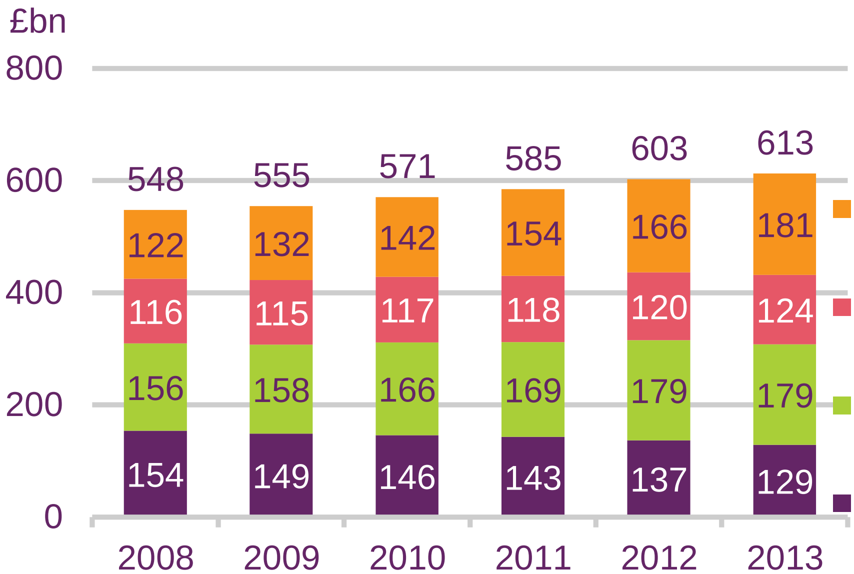
Figure 6.14

Total comparator country retail telecoms revenue, by country type: 2008 to 2013



	Annual growth	5 year CAGR
Total	1.7%	2.3%
BRIC & Nigeria	8.5%	8.1%
Asia Pacific	2.9%	1.4%
USA	0.1%	2.8%
EU	-5.8%	-3.5%

Source: IHS / industry data / Ofcom

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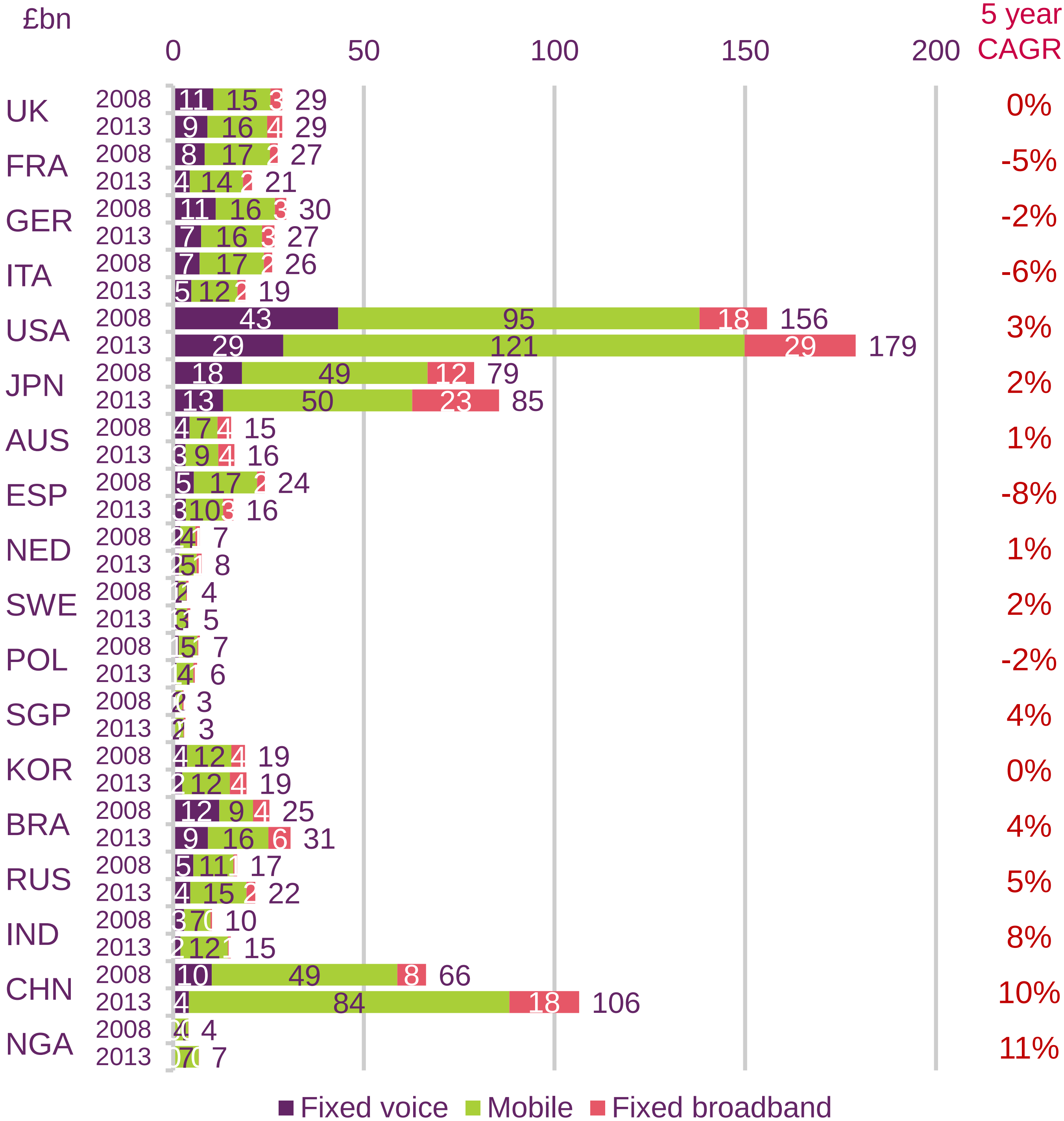
Figure 6.15

Telecoms service retail revenues, by country and sector: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Fixed voice revenues include managed VoIP revenues.

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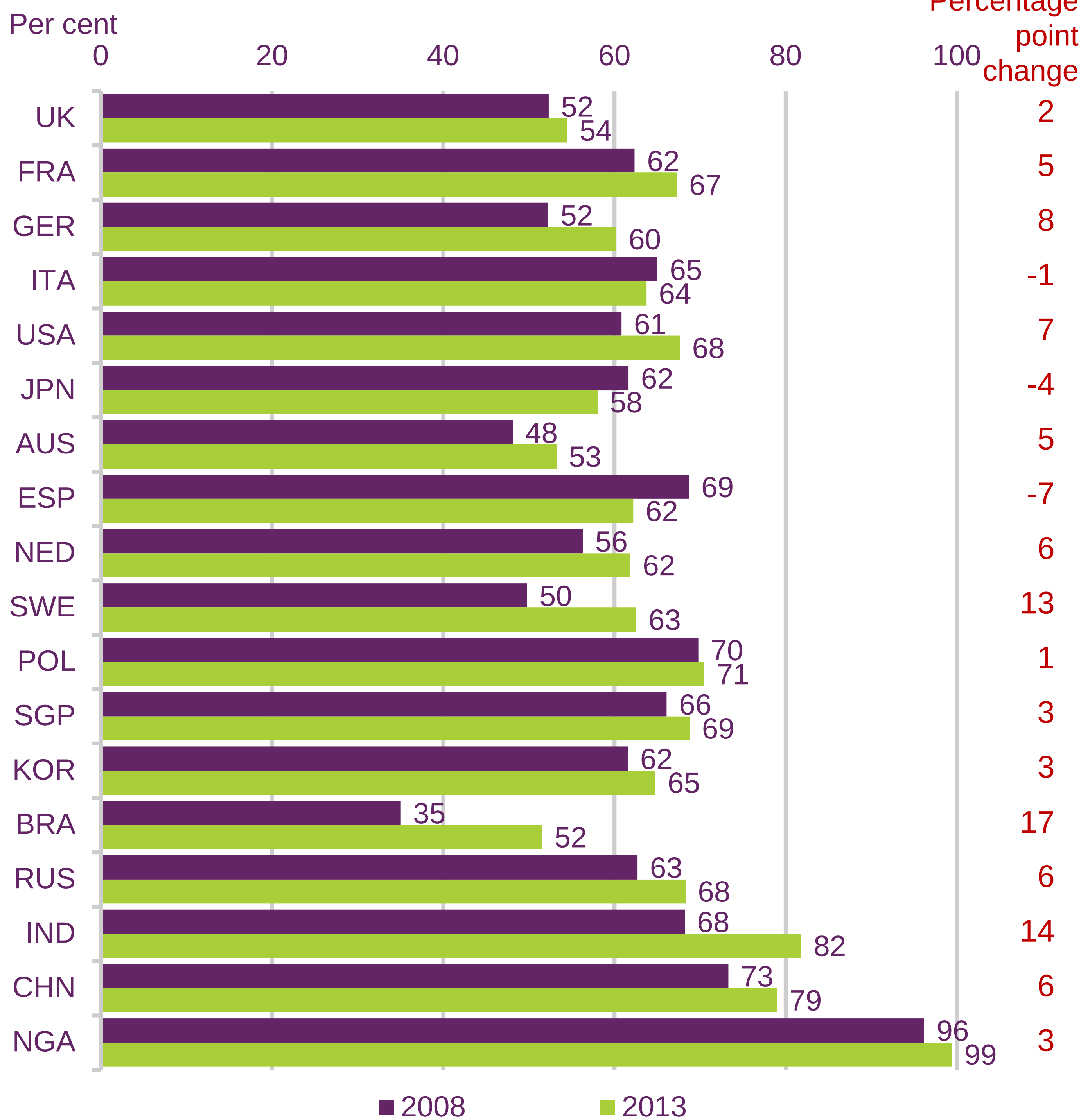
Figure 6.16

Mobile as a proportion of total telecoms revenues: 2008 and 2013



Source: IHS / industry data / Ofcom

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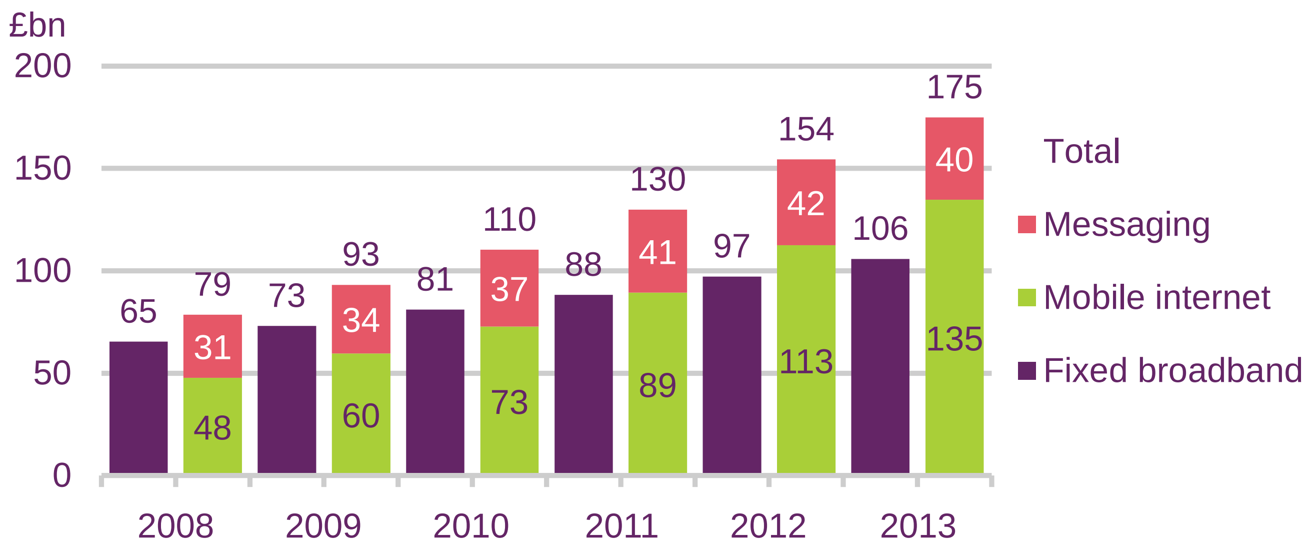
Figure 6.17

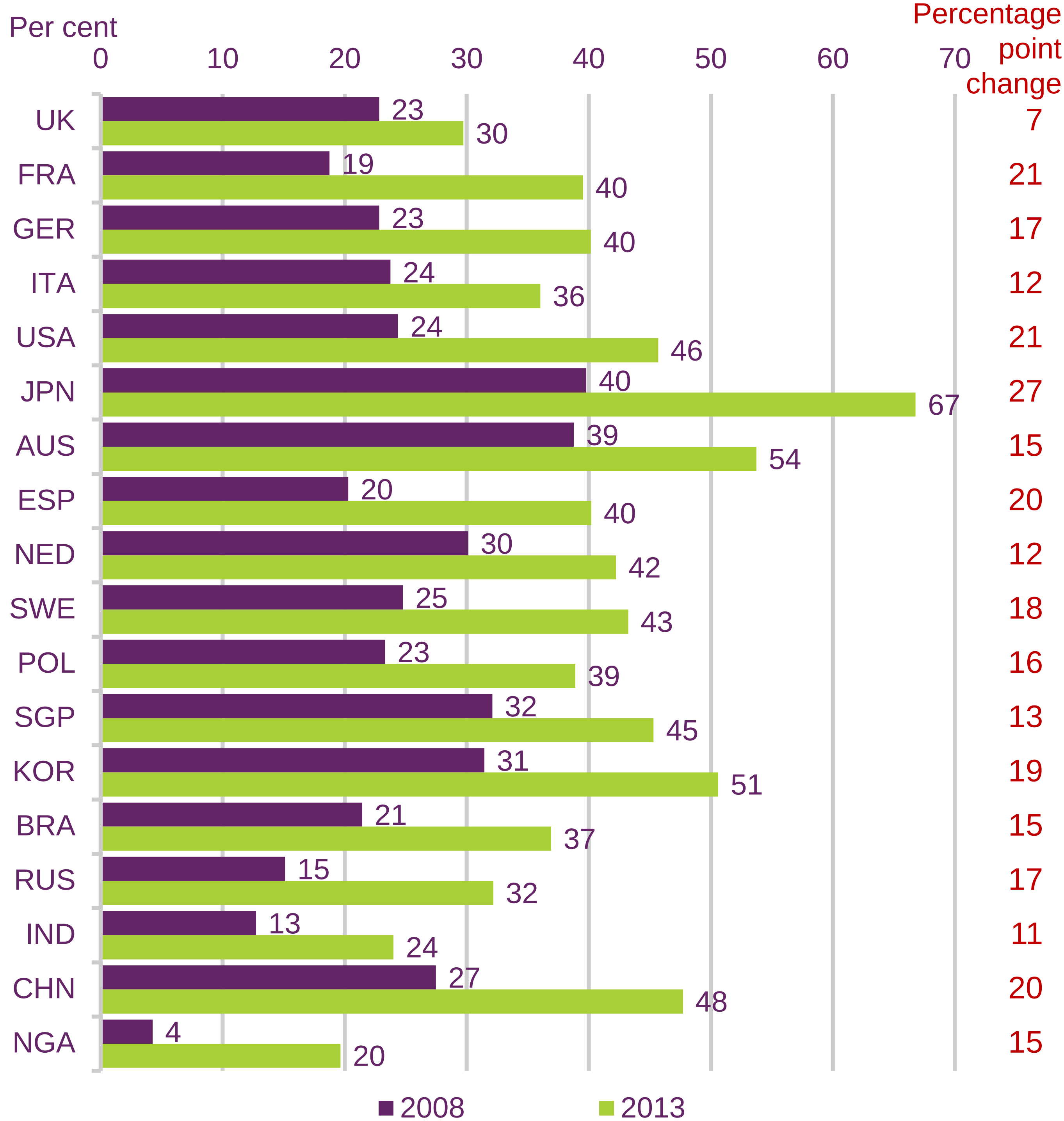
Total fixed broadband and mobile data revenues: 2008 to 2013



Source: IHS / industry data / Ofcom
Note: Messaging includes SMS and MMS.

Figure 6.18

Data revenue as a proportion of total telecoms revenue: 2008 and 2013



Source: IHS / industry data / Ofcom

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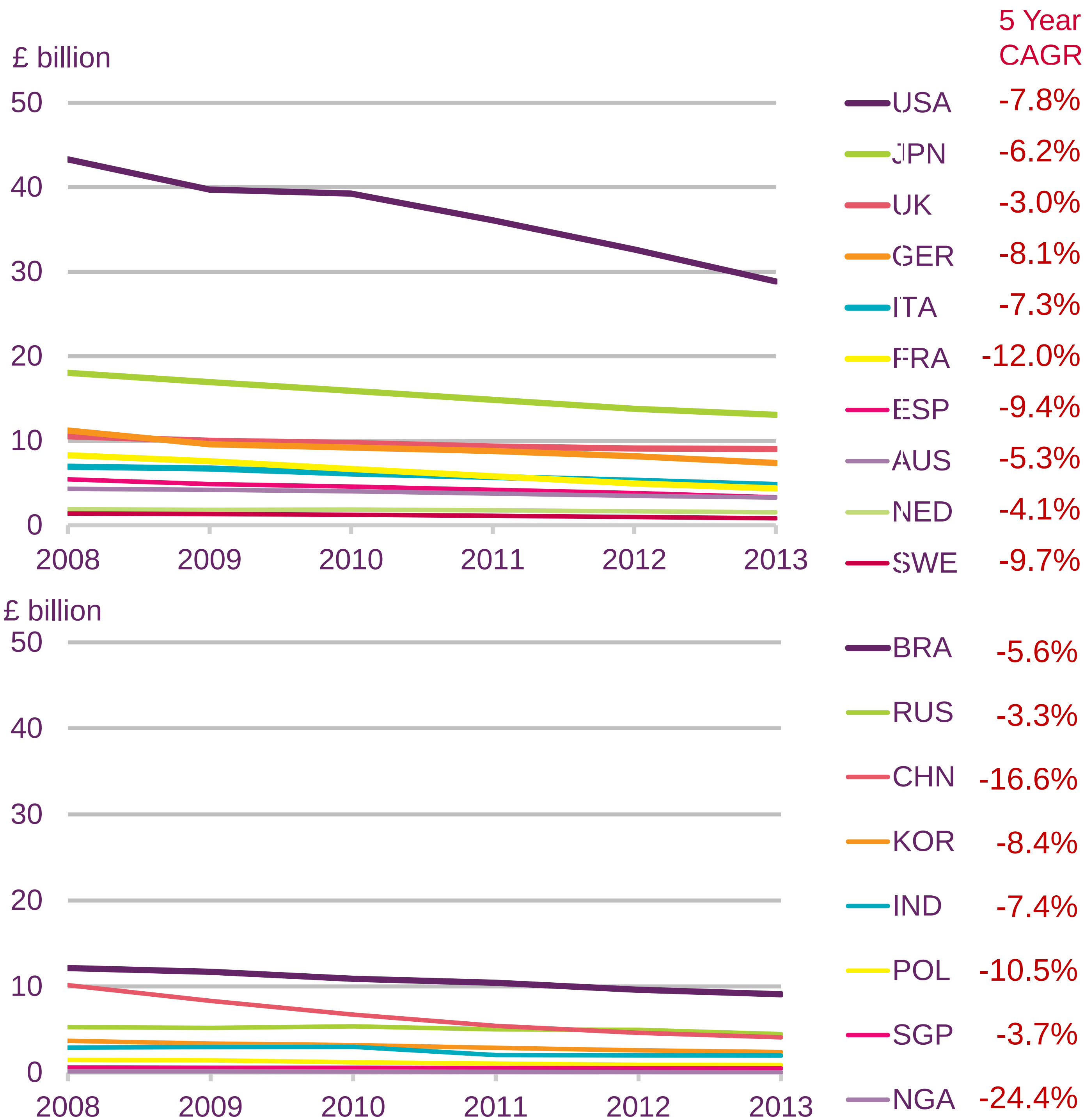
Figure 6.19

Retail fixed line voice revenues: 2008 to 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP revenues.

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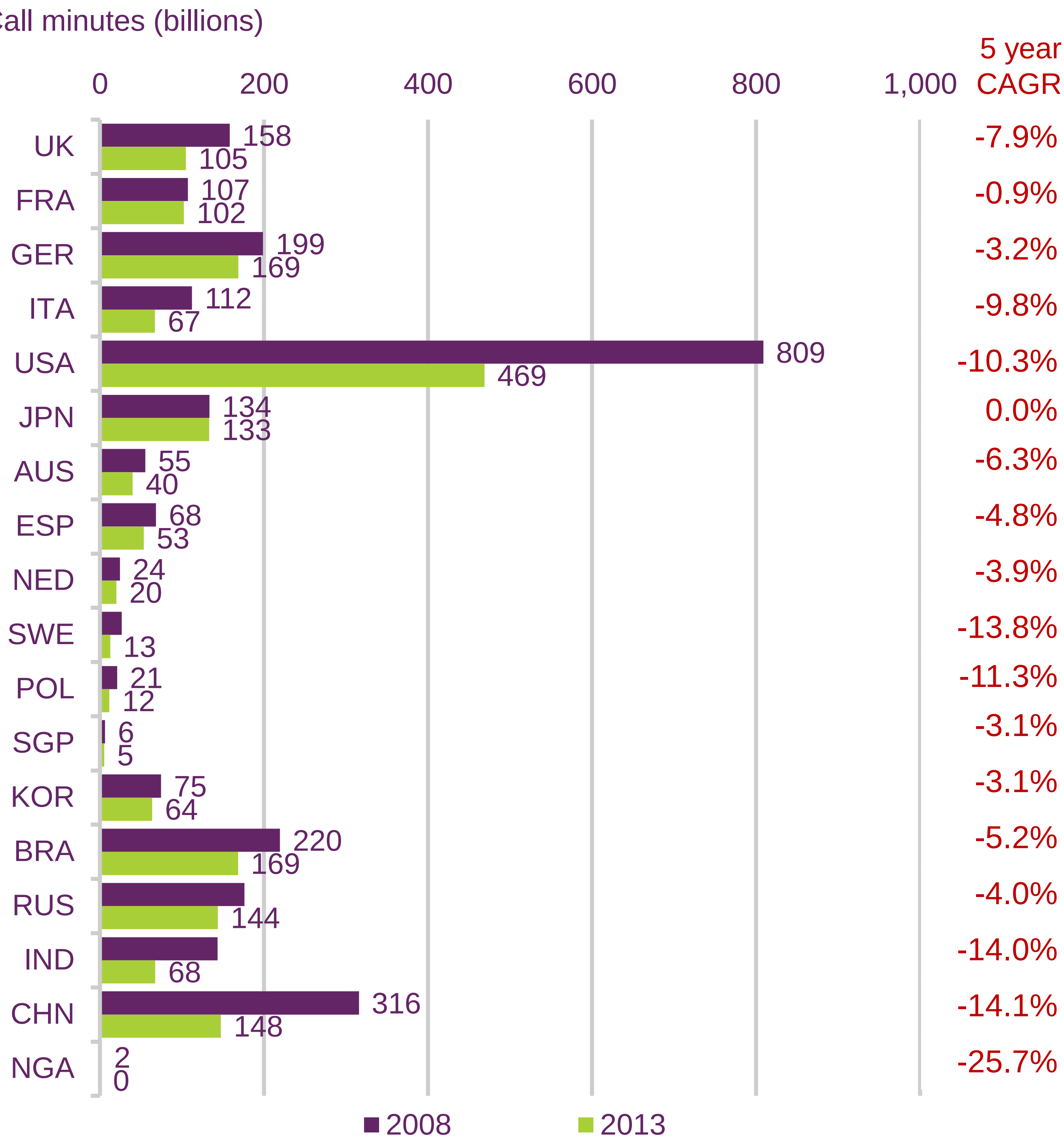
Figure 6.20

Fixed line voice call volumes: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP calls. Figures for USA and CHN include incoming calls.

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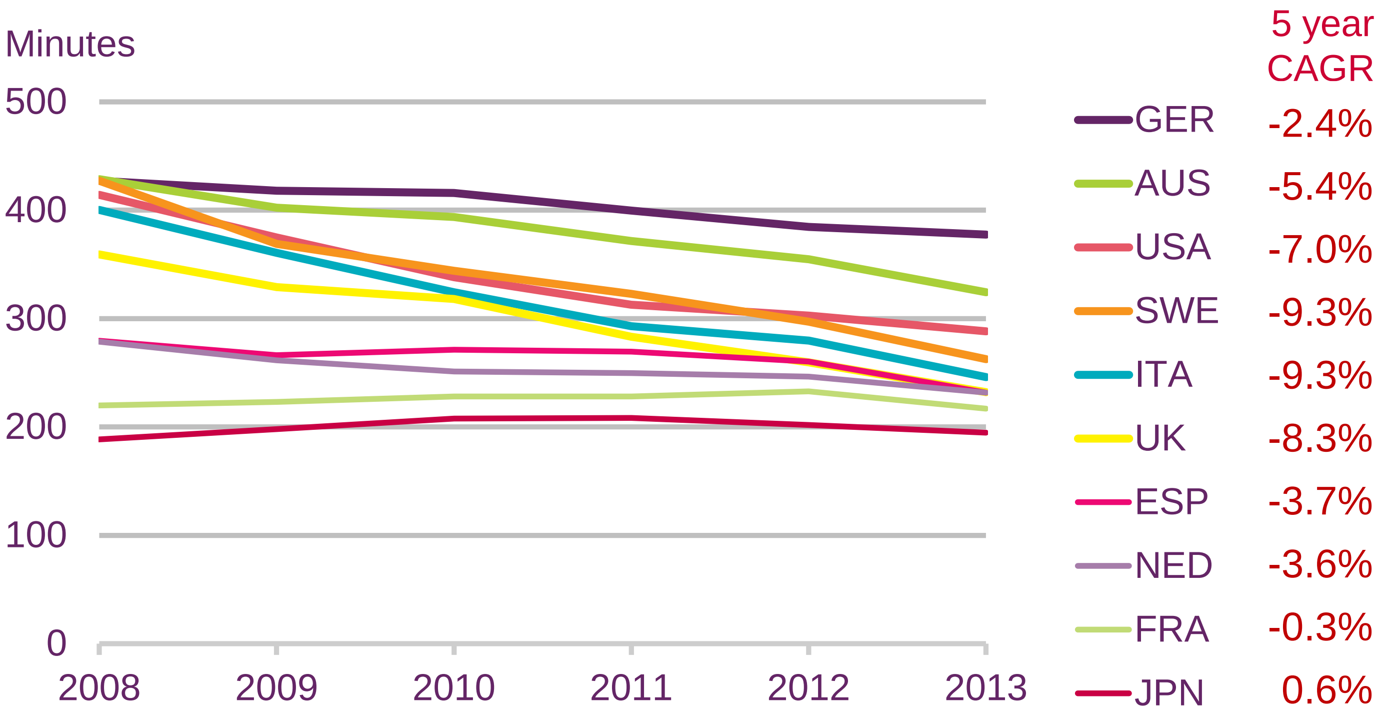
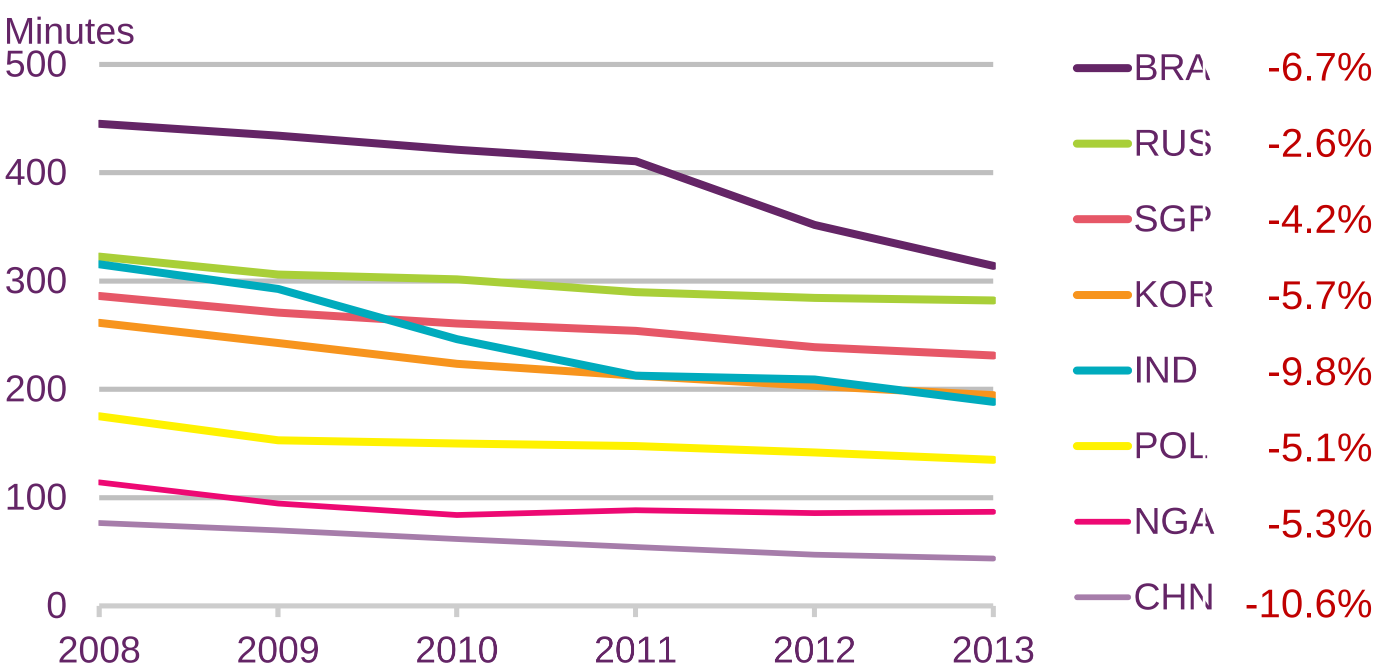
Figure 6.21

Monthly outbound minutes per fixed line: 2008 to 2013





Source: IHS / industry data / Ofcom

Note: Includes managed VoIP calls. Figures for USA and CHN include incoming calls.

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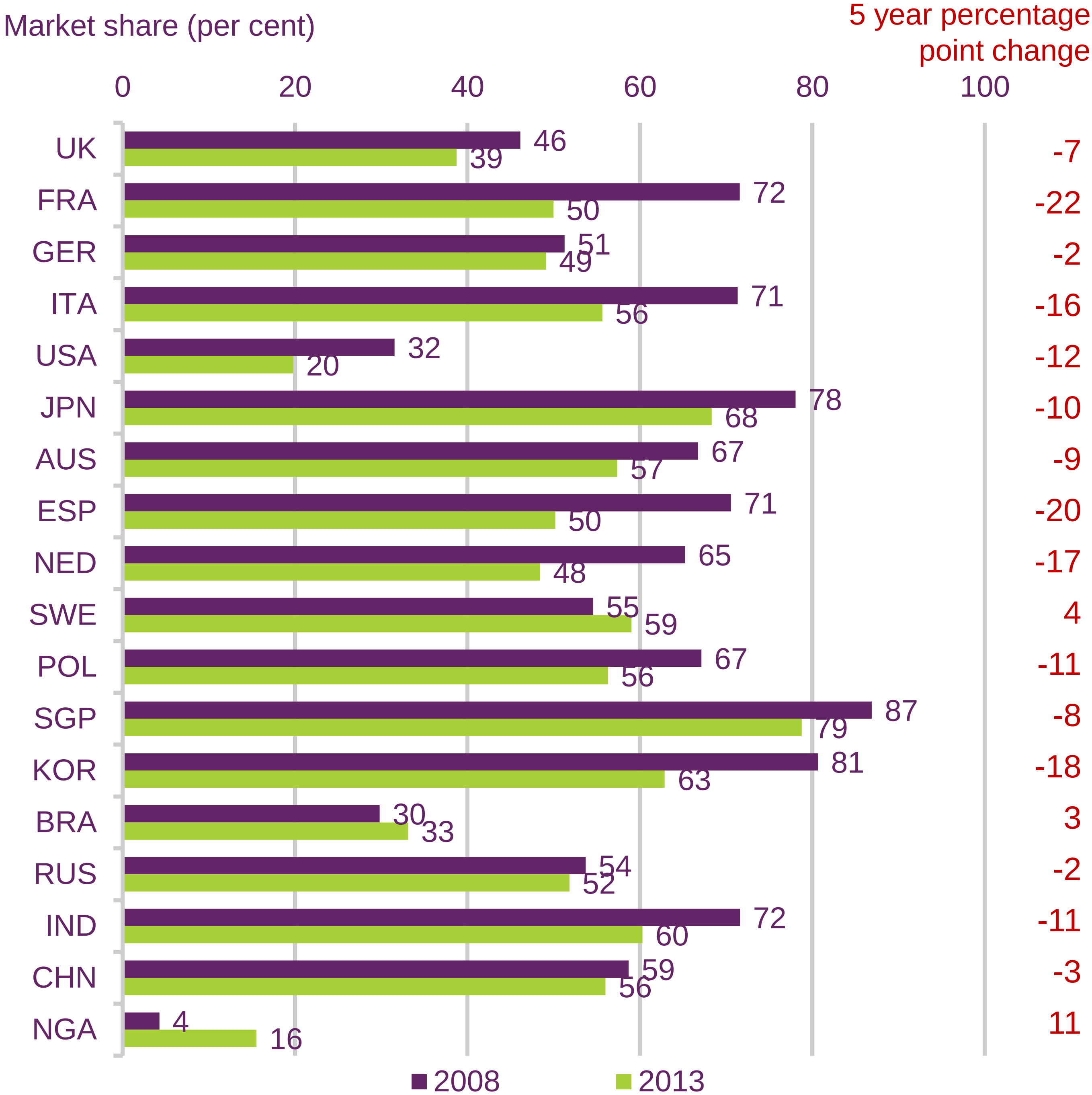
Figure 6.22

Incumbent operator's share of fixed voice call volumes: 2008 and 2013



Source: IHS / industry data / Ofcom

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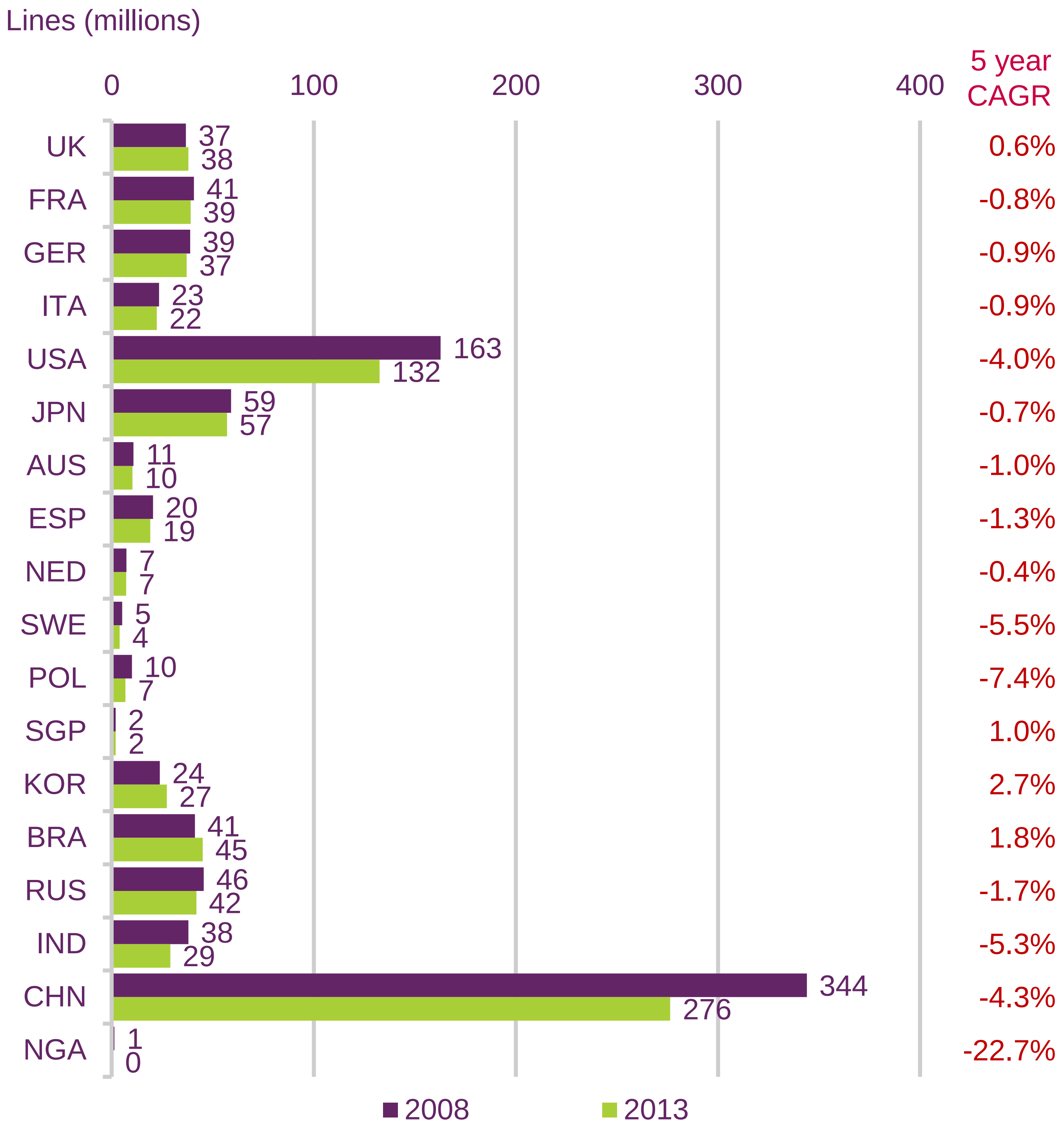
Figure 6.23

Fixed voice connections: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP connections

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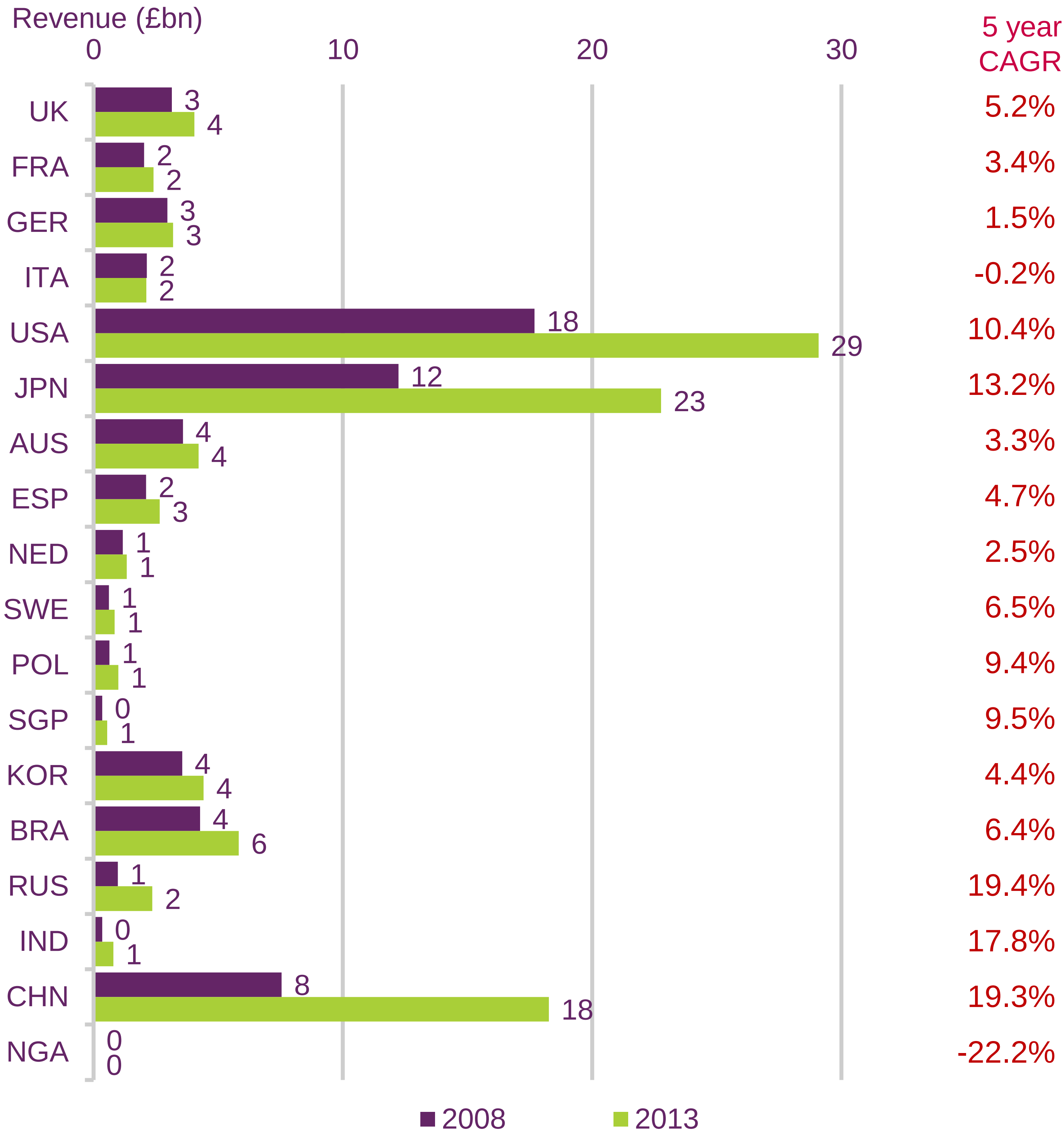
Figure 6.24

Fixed broadband revenues: 2008 and 2013



Source: IHS / industry data / Ofcom

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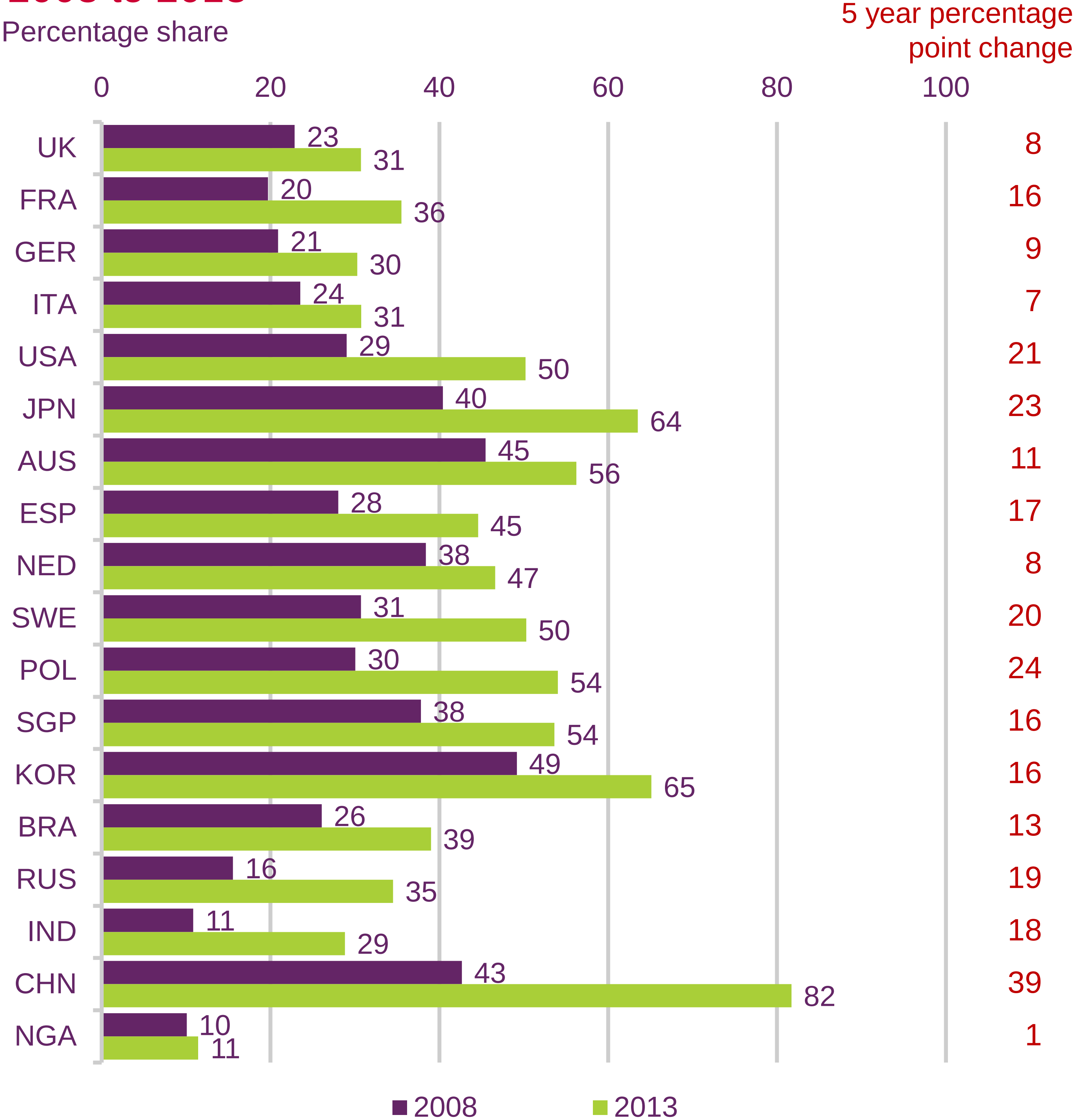
Figure 6.25

Fixed broadband as a proportion of total fixed revenues: 2008 to 2013



Source: IHS / industry data / Ofcom

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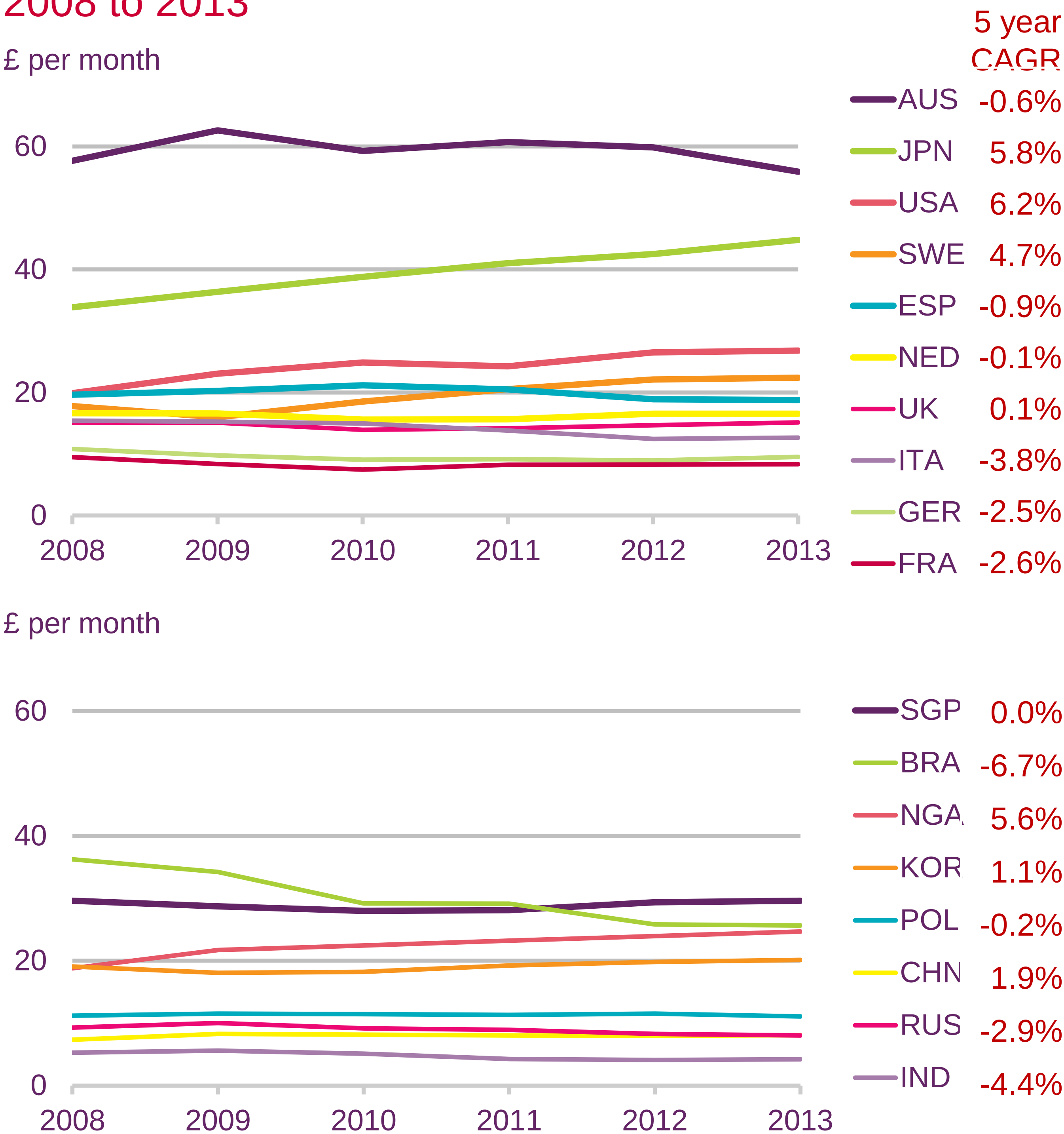
Figure 6.26

Retail fixed broadband average revenue per connection: 2008 to 2013



Source: IHS / industry data / Ofcom

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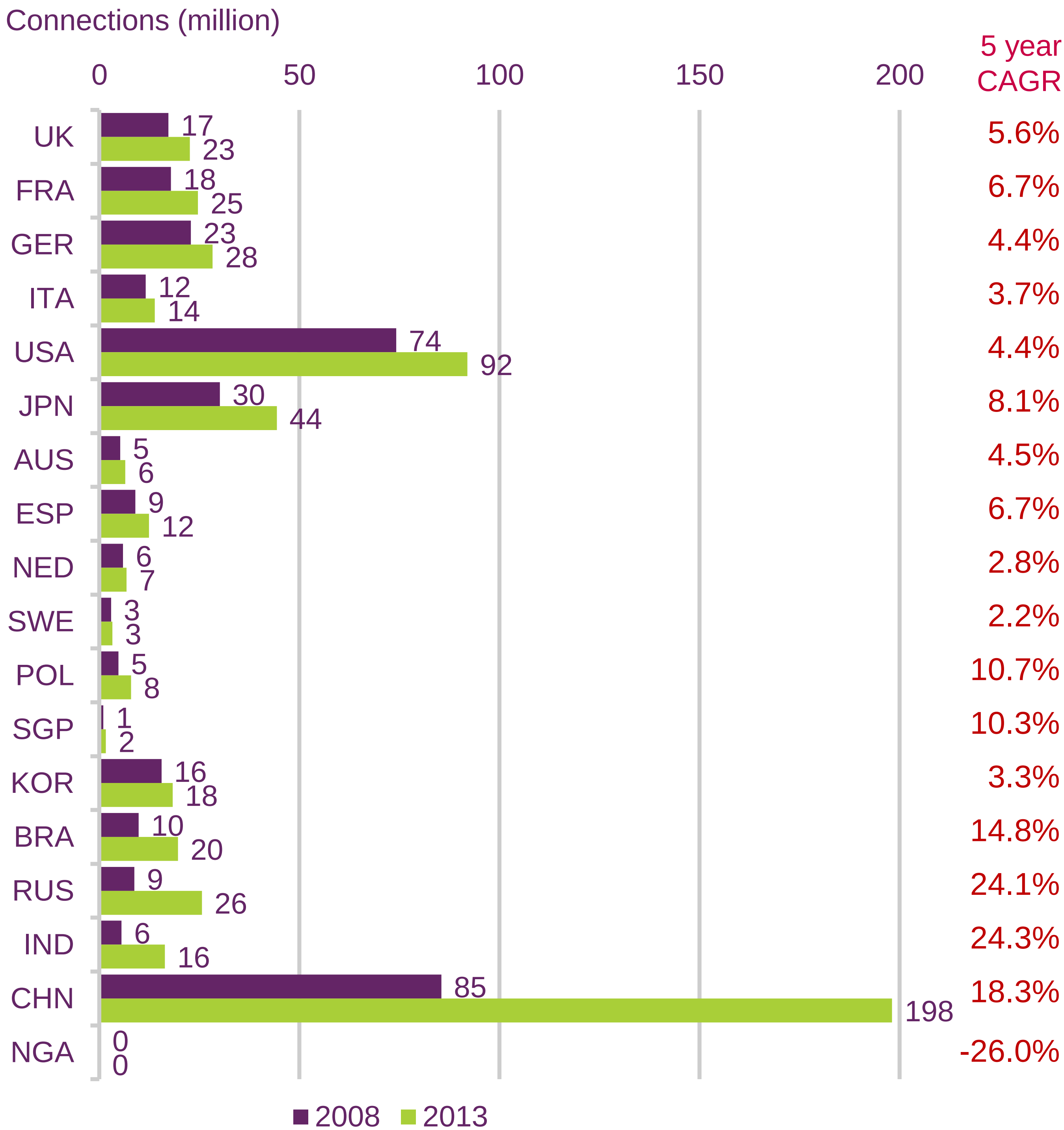
Figure 6.27

Fixed broadband connections: 2008 to 2013



Source: IHS / industry data / Ofcom

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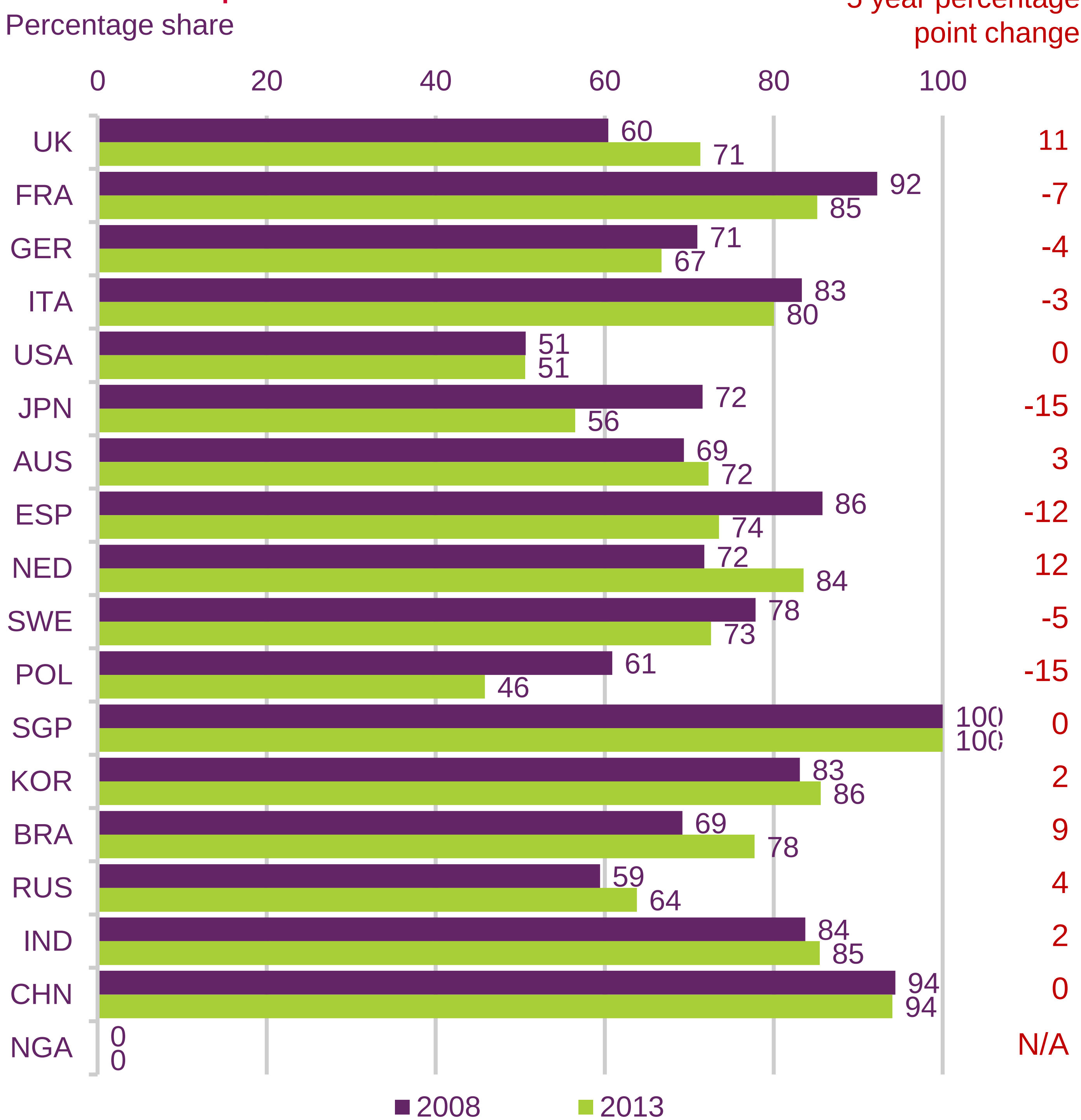
Figure 6.28

Retail connection share of the three largest fixed broadband providers: 2008 to 2013



Source: IHS / industry data / Ofcom

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Figure 6.29

Total comparator country retail mobile telecoms revenue, by sector: 2008 to 2013

Source: IHS / industry data / Ofcom
Note: Messaging includes SMS and MMS.

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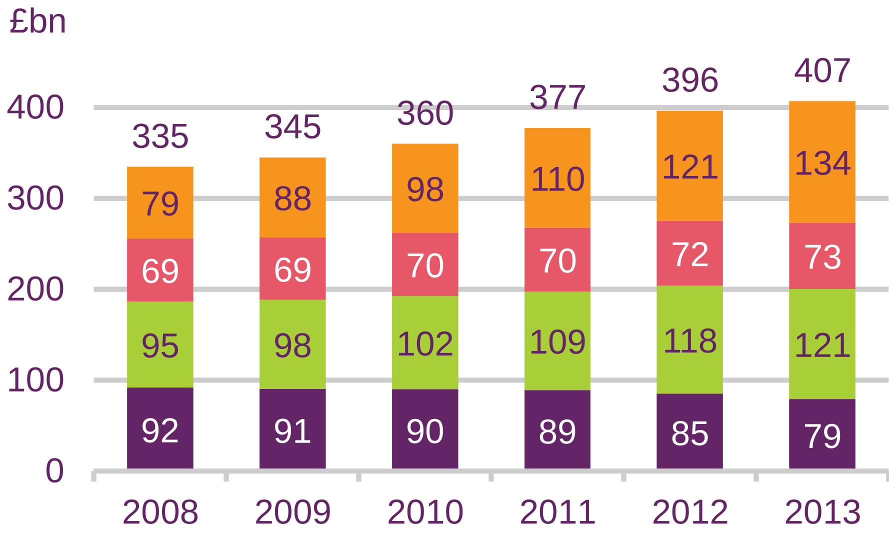
Figure 6.30

Total comparator country retail mobile telecoms revenue, by country type: 2008 to 2013



	Annual growth	5 year CAGR
Total	2.7%	4.0%
BRIC & Nigeria	10.5%	11.2%
Asia Pacific	1.9%	1.0%
USA	2.3%	5.0%
EU	-7.2%	-2.9%

Source: IHS / industry data / Ofcom

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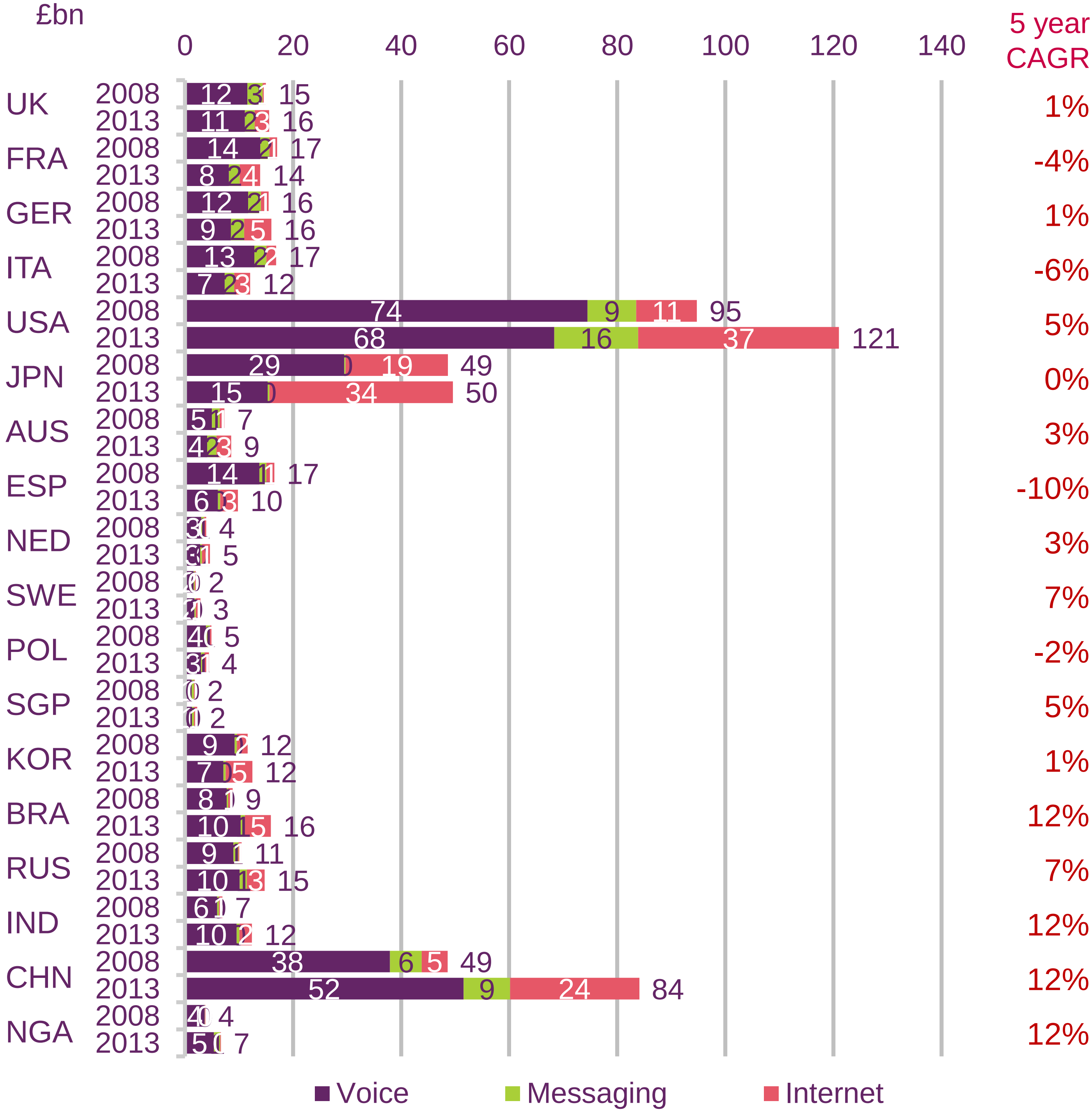
Figure 6.31

Retail mobile revenues, by service and country: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Messaging includes SMS and MMS.

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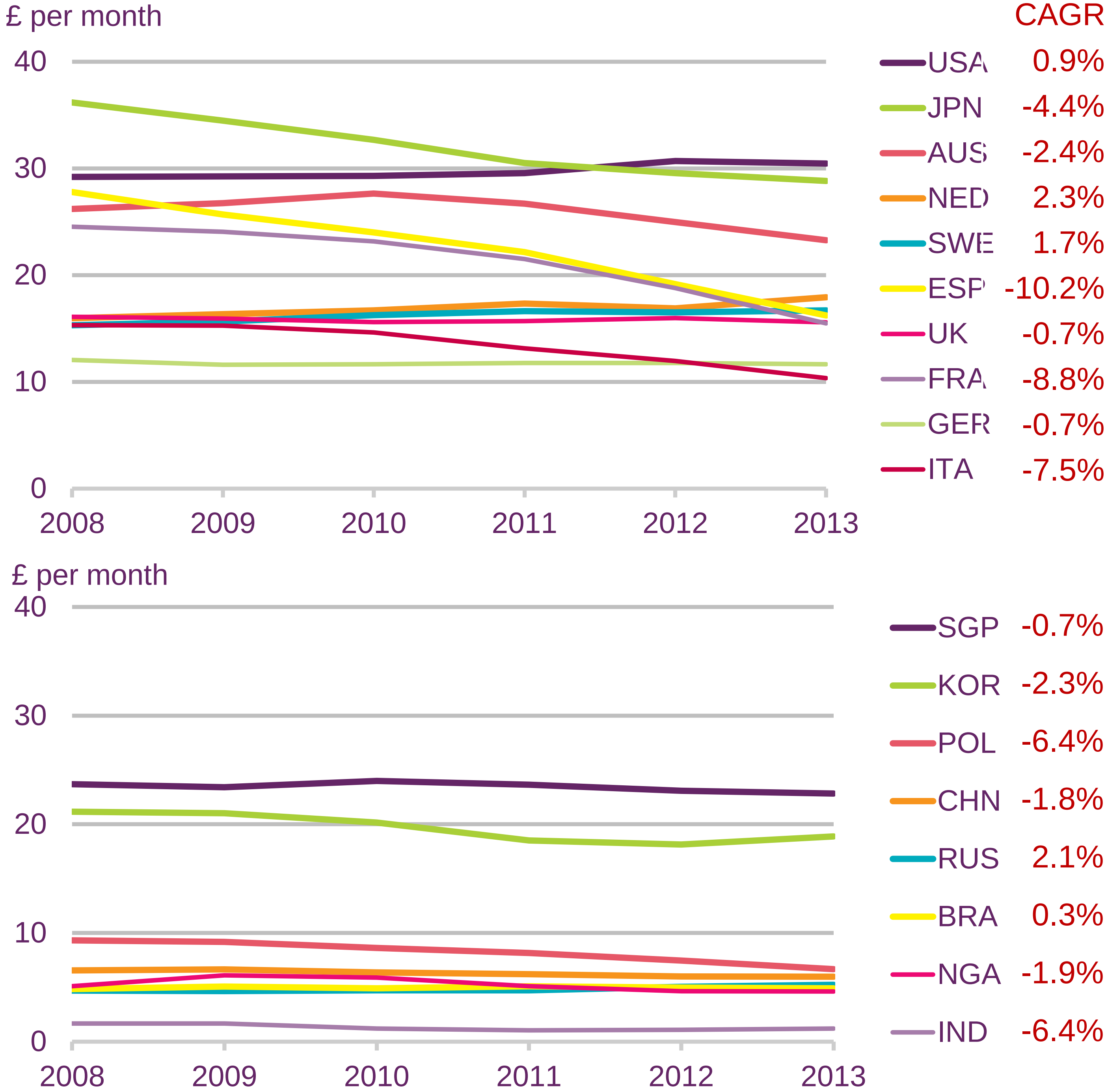
Figure 6.32

Average monthly revenue per mobile connection: 2008 to 2013



Source: IHS / industry data / Ofcom

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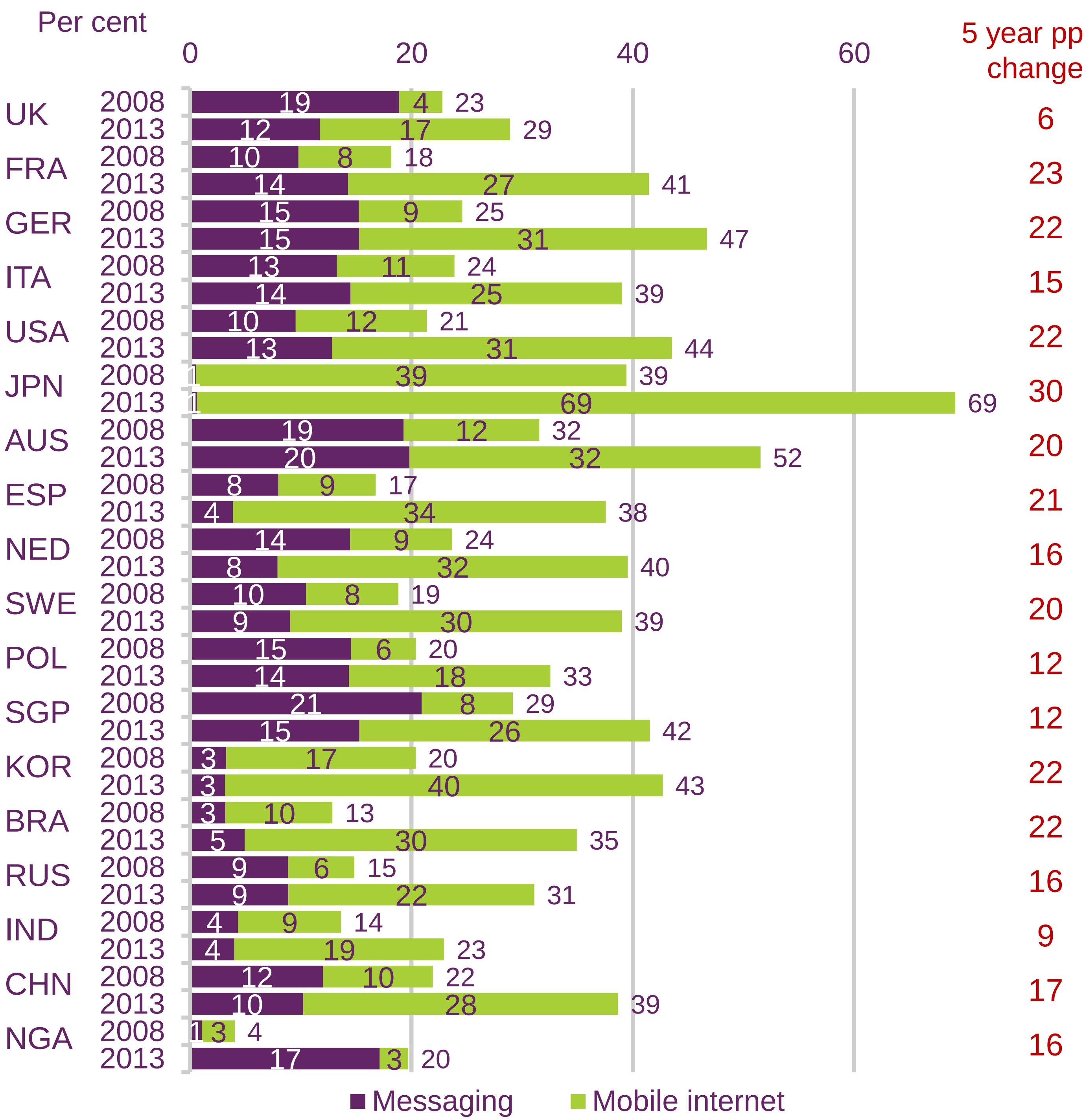
Figure 6.33

Data as a proportion of total mobile service revenues: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Messaging includes SMS and MMS.

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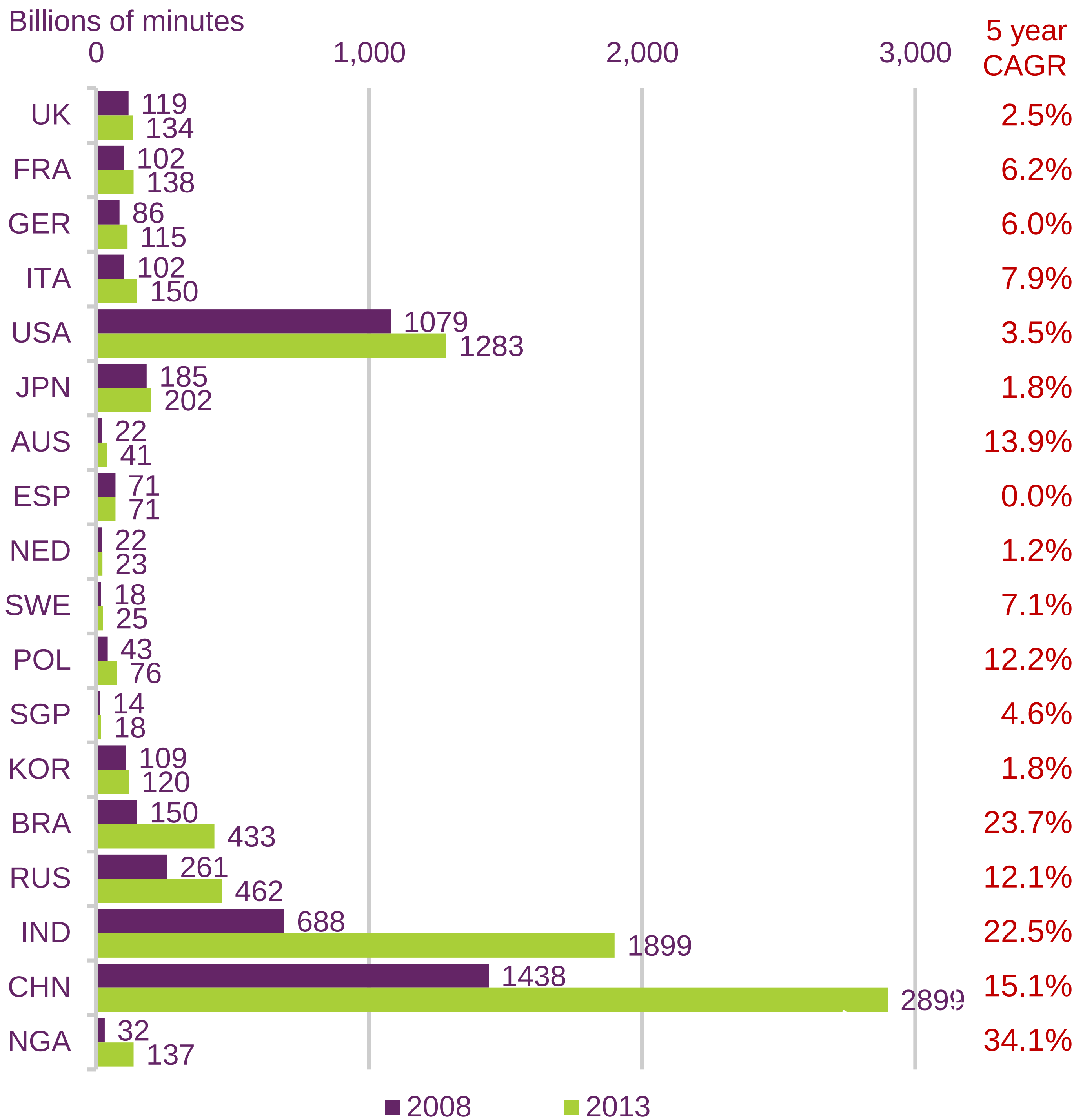
Figure 6.34

Mobile voice call volumes: 2008 and 2013



Source: IHS / industry data / Ofcom

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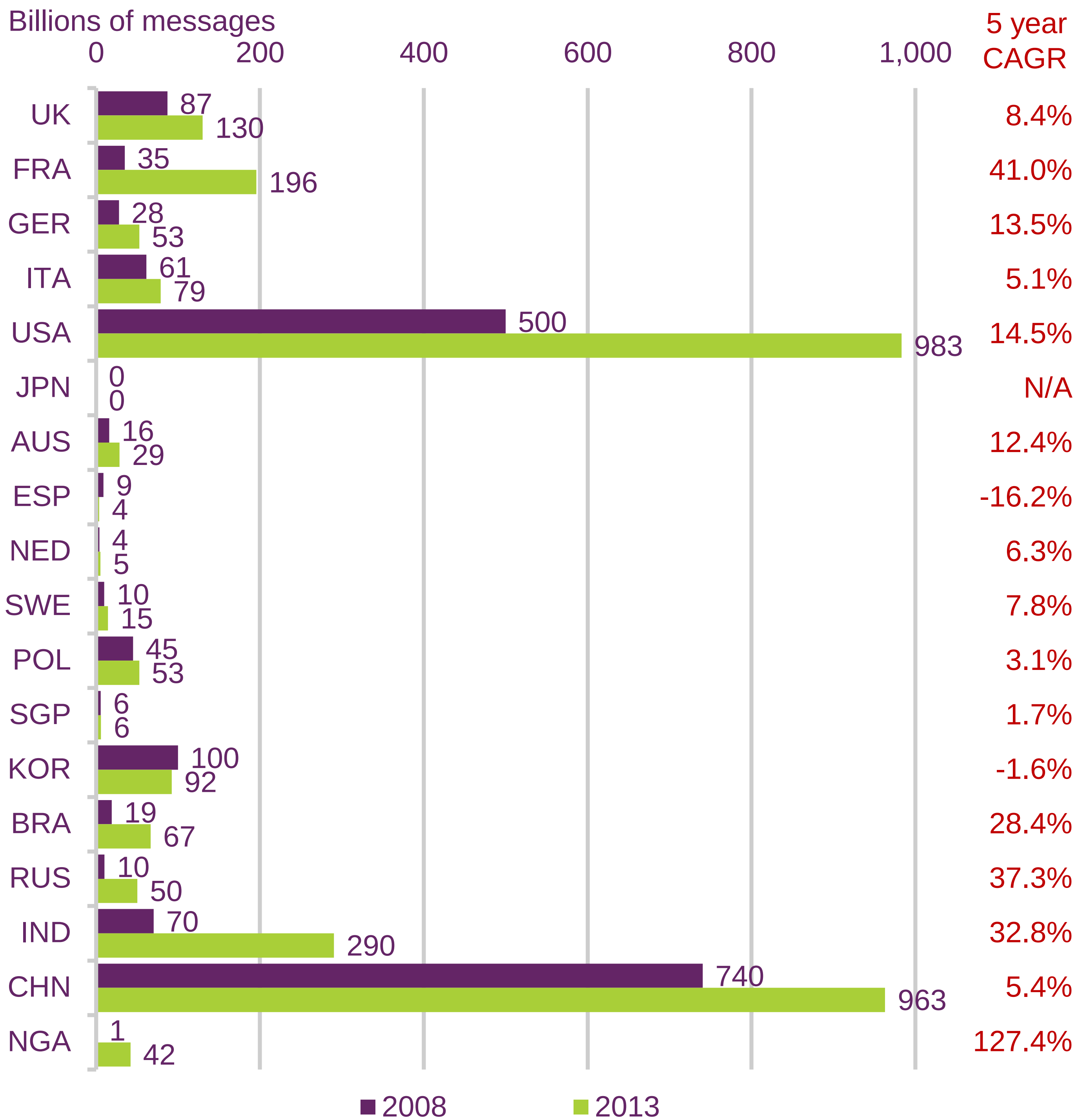
Figure 6.35

Mobile messaging volumes: 2008 and 2013



Source: IHS / industry data / Ofcom

Note: Includes SMS and MMS messages.

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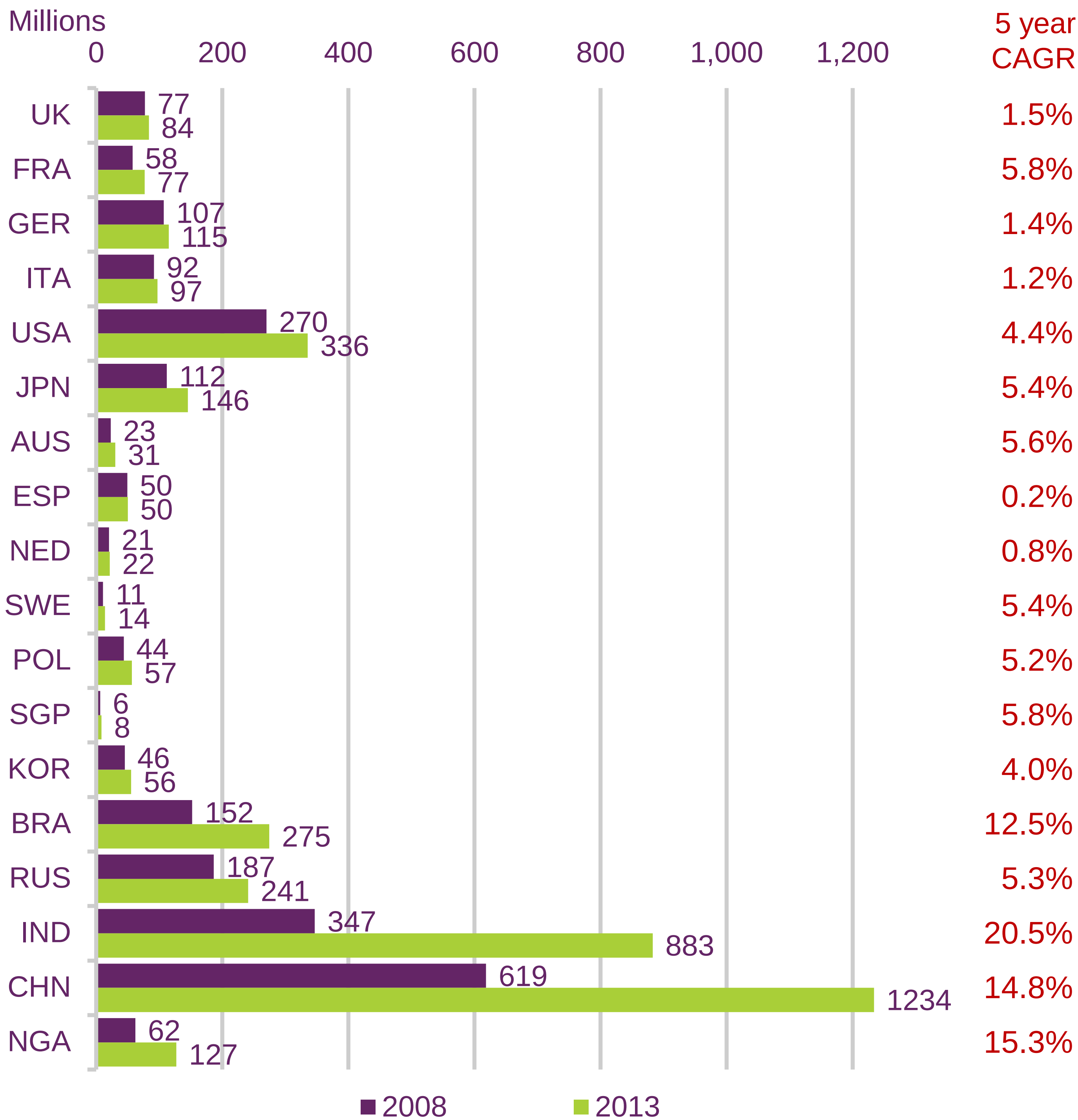
Figure 6.36

Mobile connections: 2008 and 2013



Source: IHS / industry data / Ofcom

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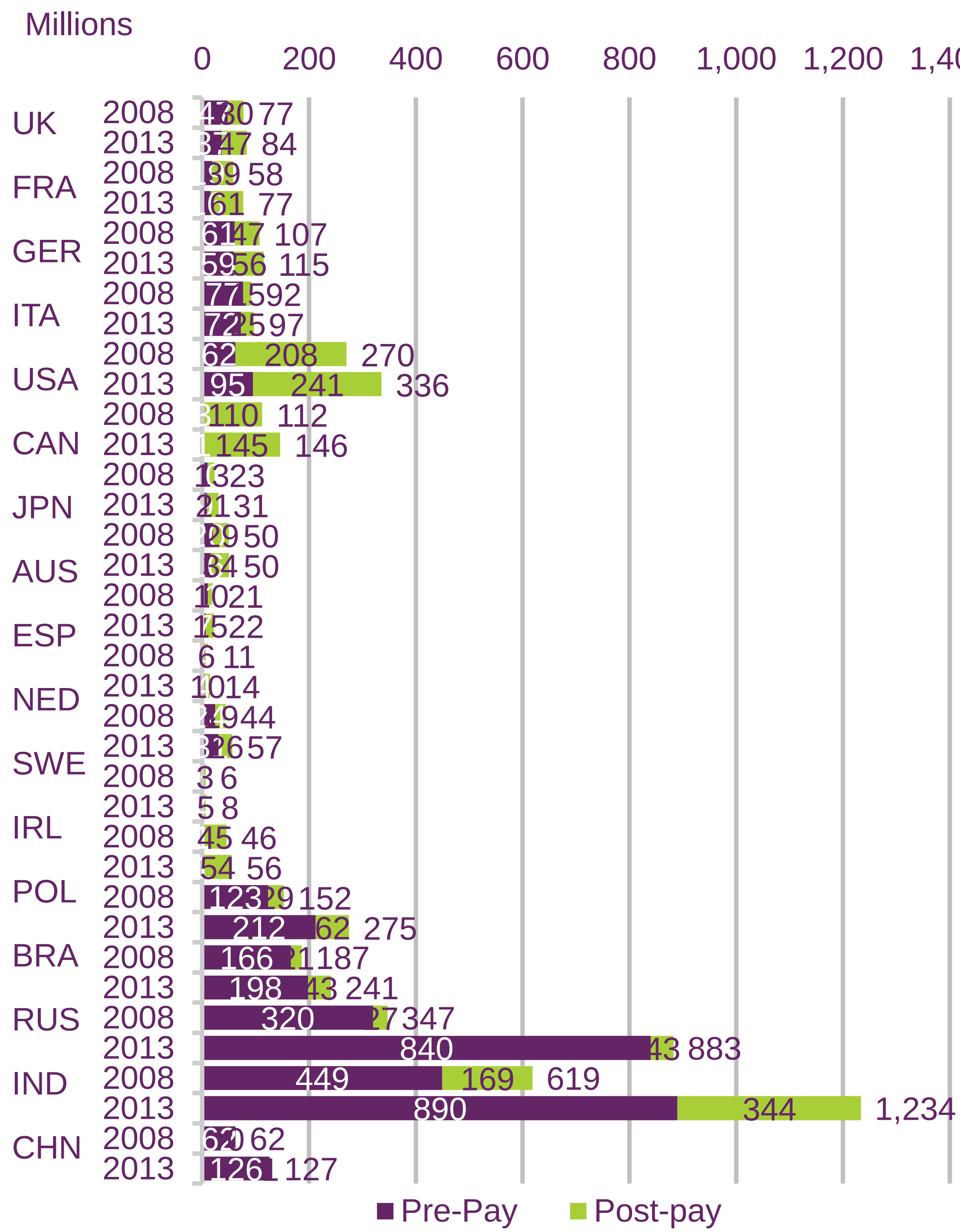
Figure 6.37

Mobile connections, by type: 2008 and 2013



Change in % post-pay

1 year	5 year CAGR
3.9	17.4
4.6	11.9
1.7	5.0
0.8	9.5
2.1	-5.2
0.1	1.5
1.5	13.8
3.7	9.5
1.8	19.9
1.3	10.5
0.0	1.5
-0.7	2.4
0.0	0.0
2.1	3.7
1.3	6.7
0.6	-2.9
0.3	0.5
0.1	0.6

Source: IHS / industry data / Ofcom

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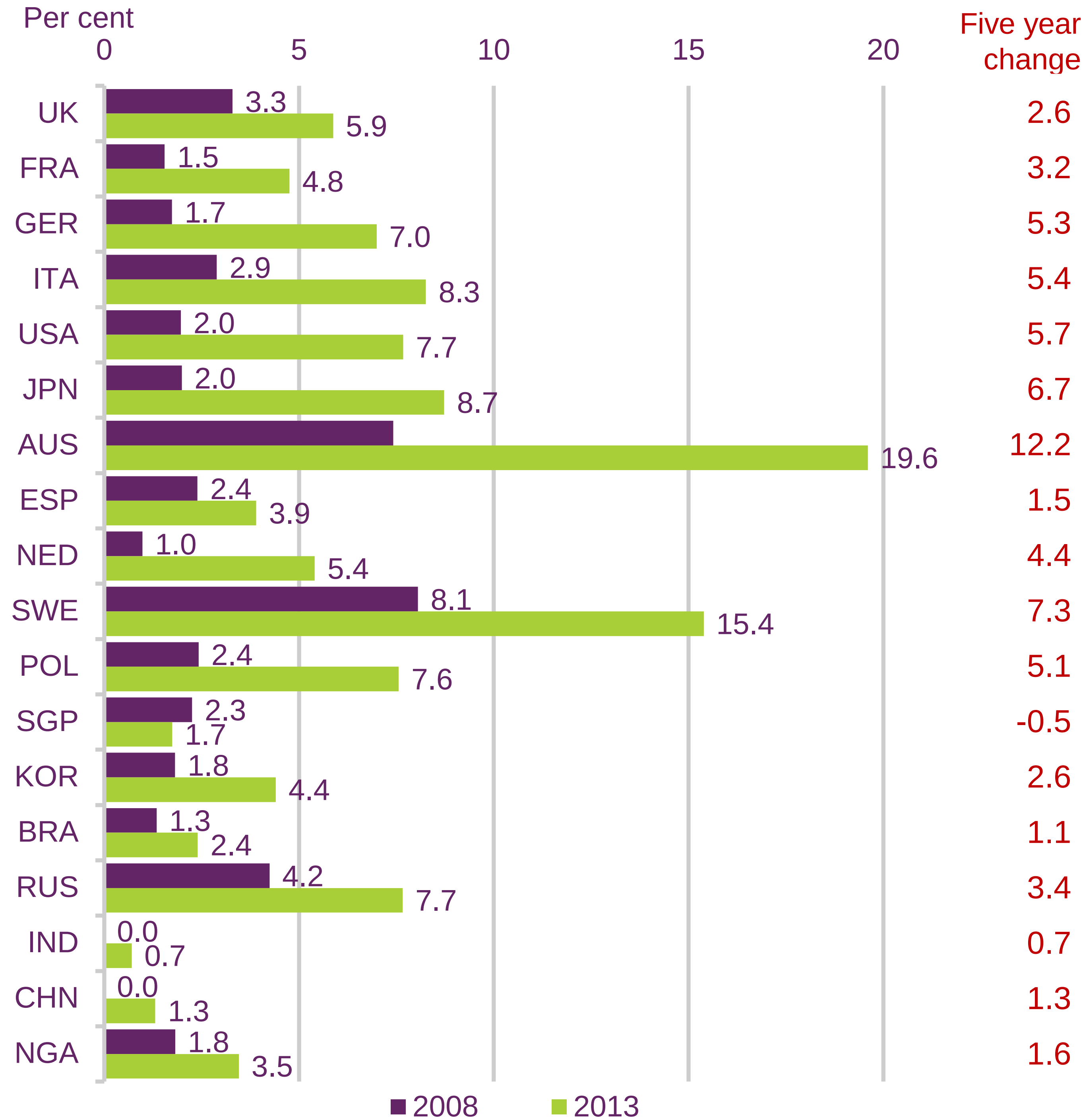
Figure 6.38

Dedicated mobile broadband as a proportion of total mobile connections: 2008 and 2013



Source: IHS / industry data / Ofcom

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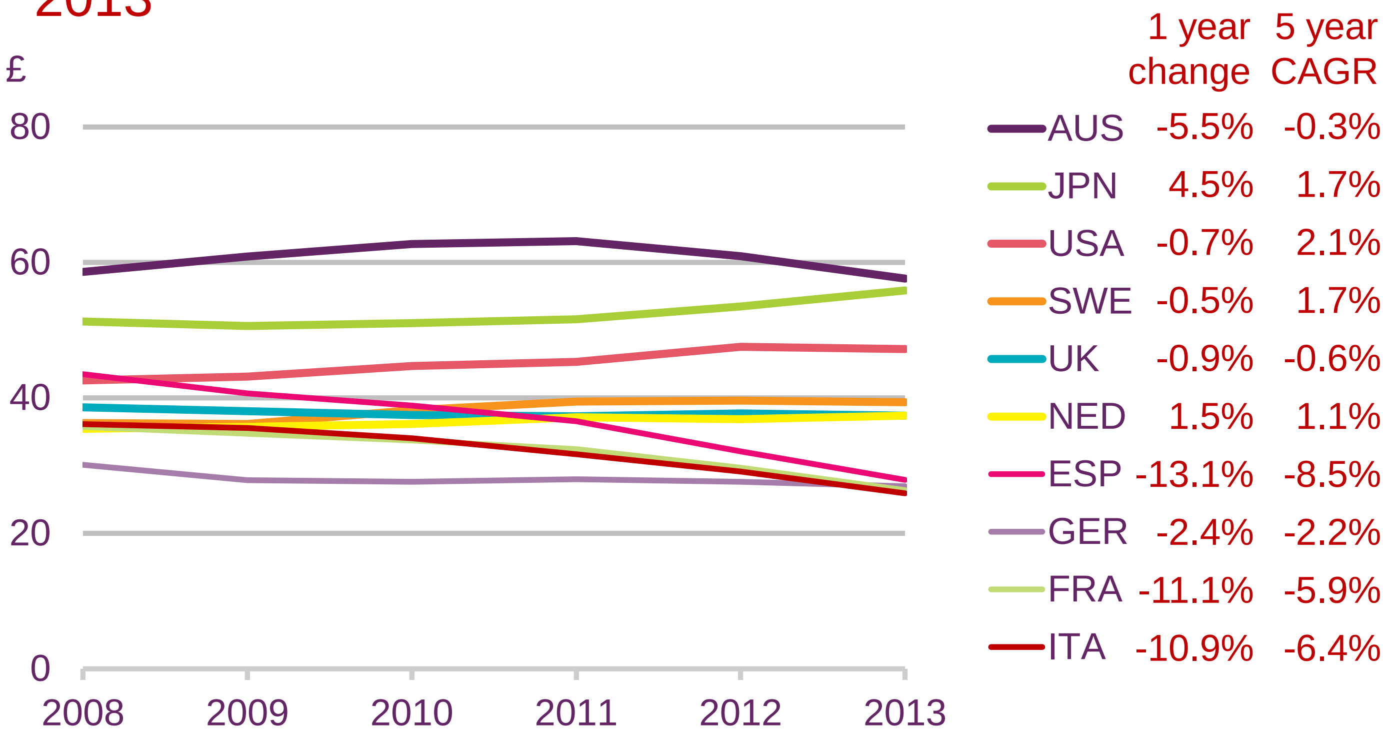
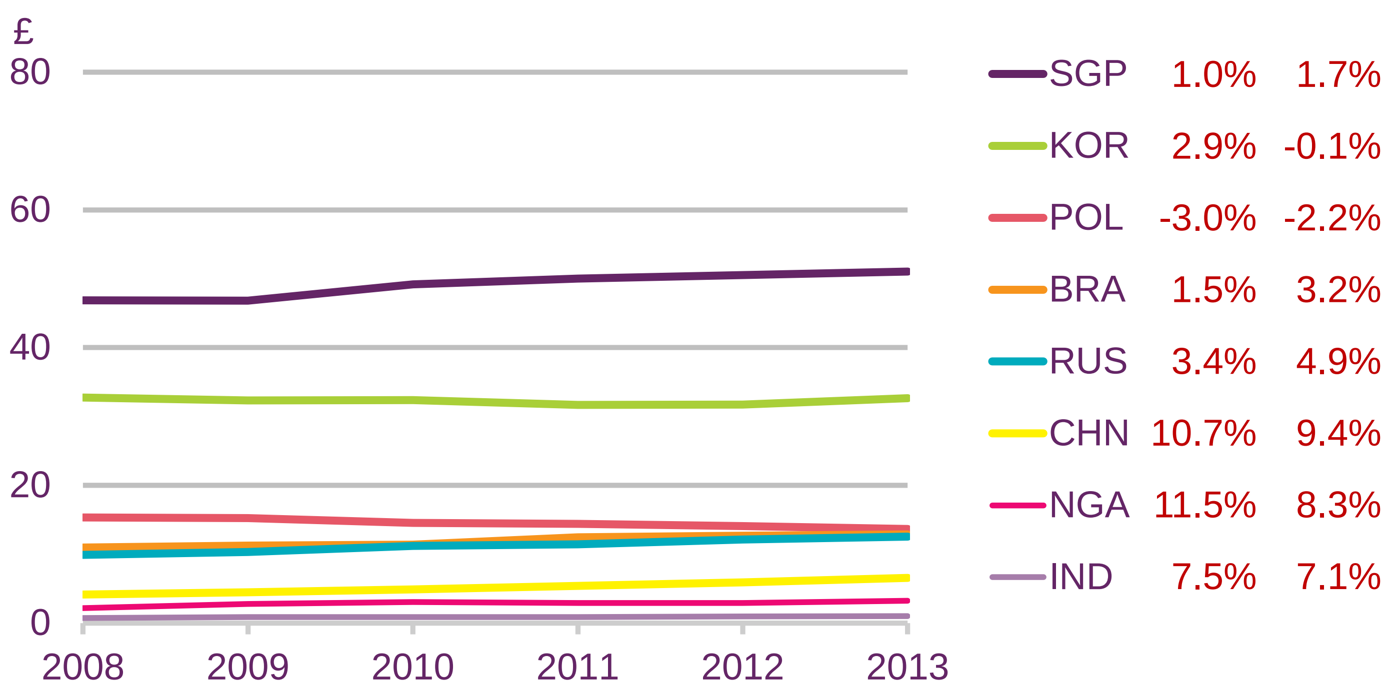
Figure 6.39

Per-capita monthly telecoms service revenue: 2008 to 2013





Source: IHS / industry data / Ofcom

Note: Includes spend by businesses, and is therefore not representative of average consumer spend.

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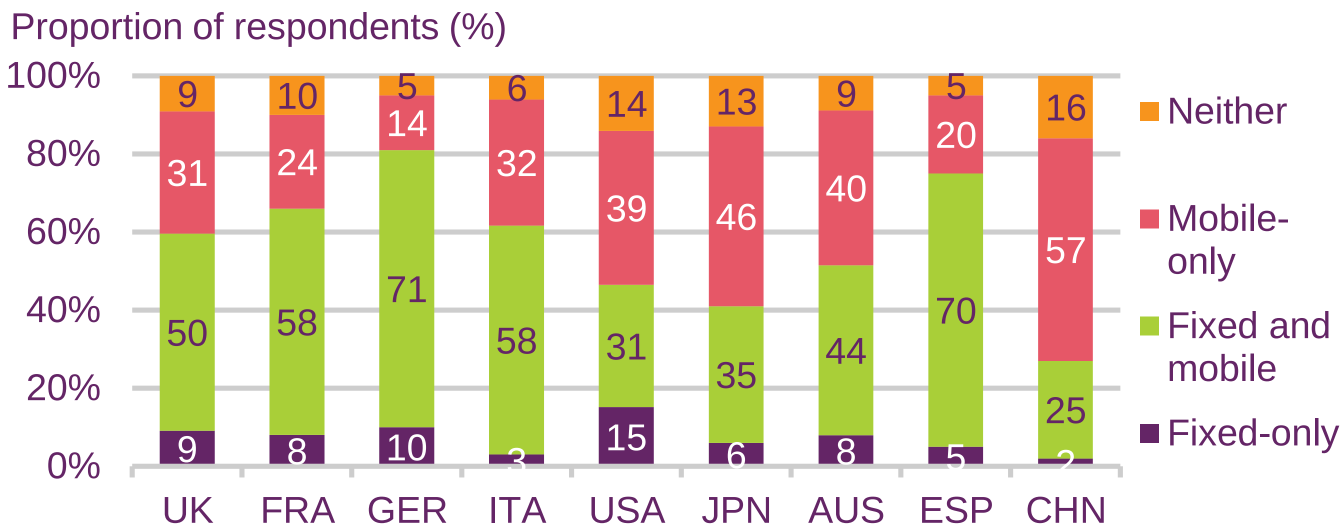
Figure 6.40

Regular use of fixed and mobile telephony services



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.
Q6. Which of the following do you regularly do (at least once a week)?

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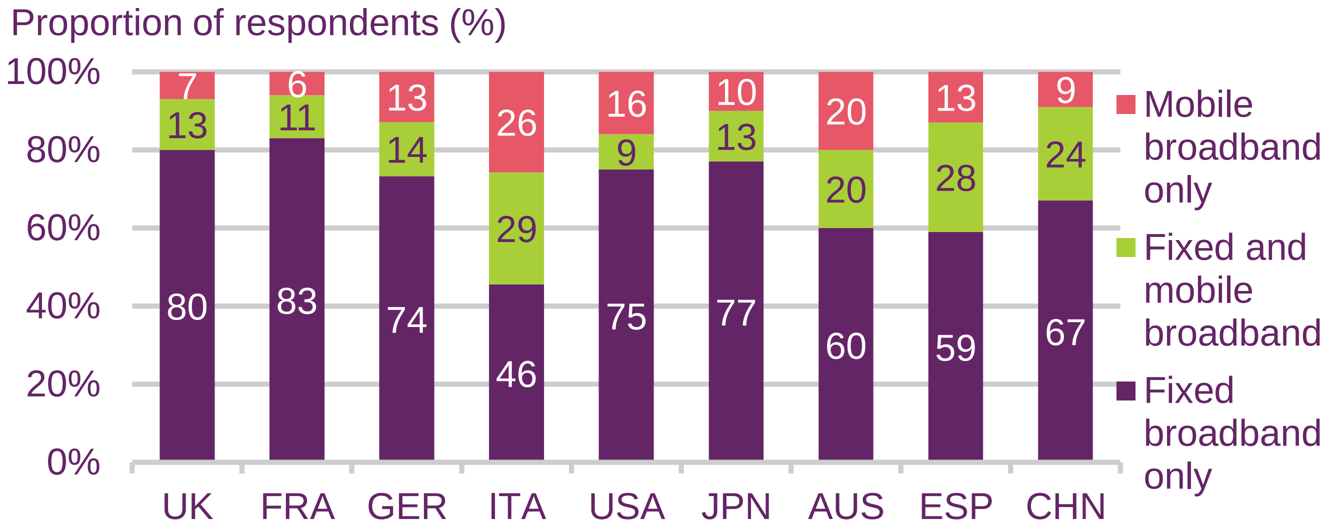
Figure 6.41

Household take-up of fixed and mobile broadband data connections



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?

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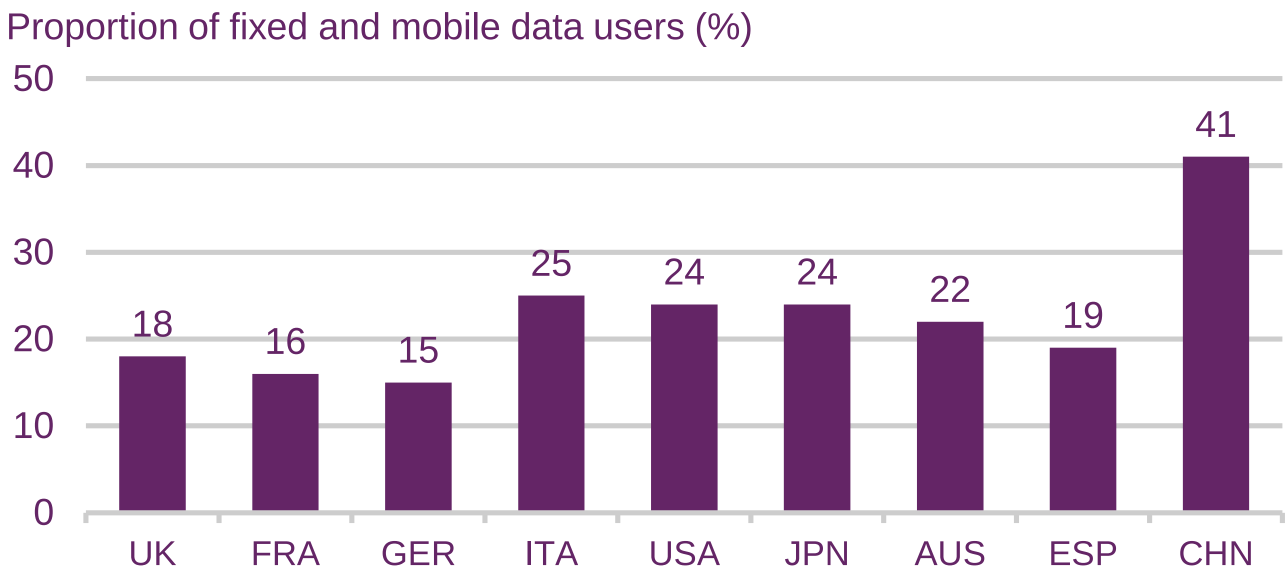
Figure 6.42

Proportion of respondents using VoIP services at least one a week



Source: Ofcom consumer research October 2014
Base: All respondents with mobile broadband internet access or those who access the internet access via a mobile handset, UK=339, FRA=361, GER=383, ITA=662, USA=284, JPN=250, AUS=464, ESP=620, CHN=568
Q.27 How often, if at all, do you use your main mobile phone to do each of the following?

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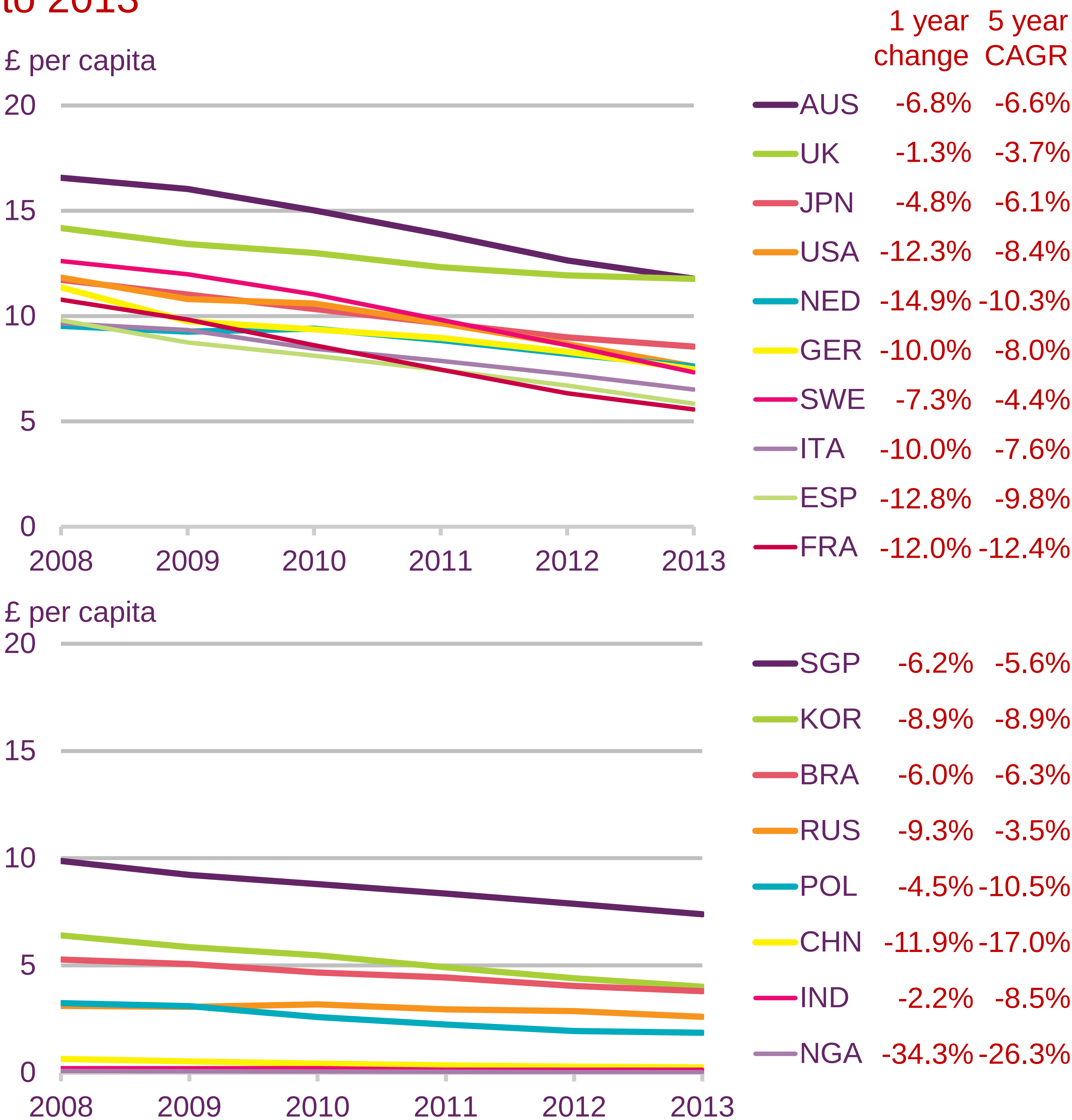
Figure 6.43

Average monthly per-capita fixed voice revenue: 2008 to 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP revenues.

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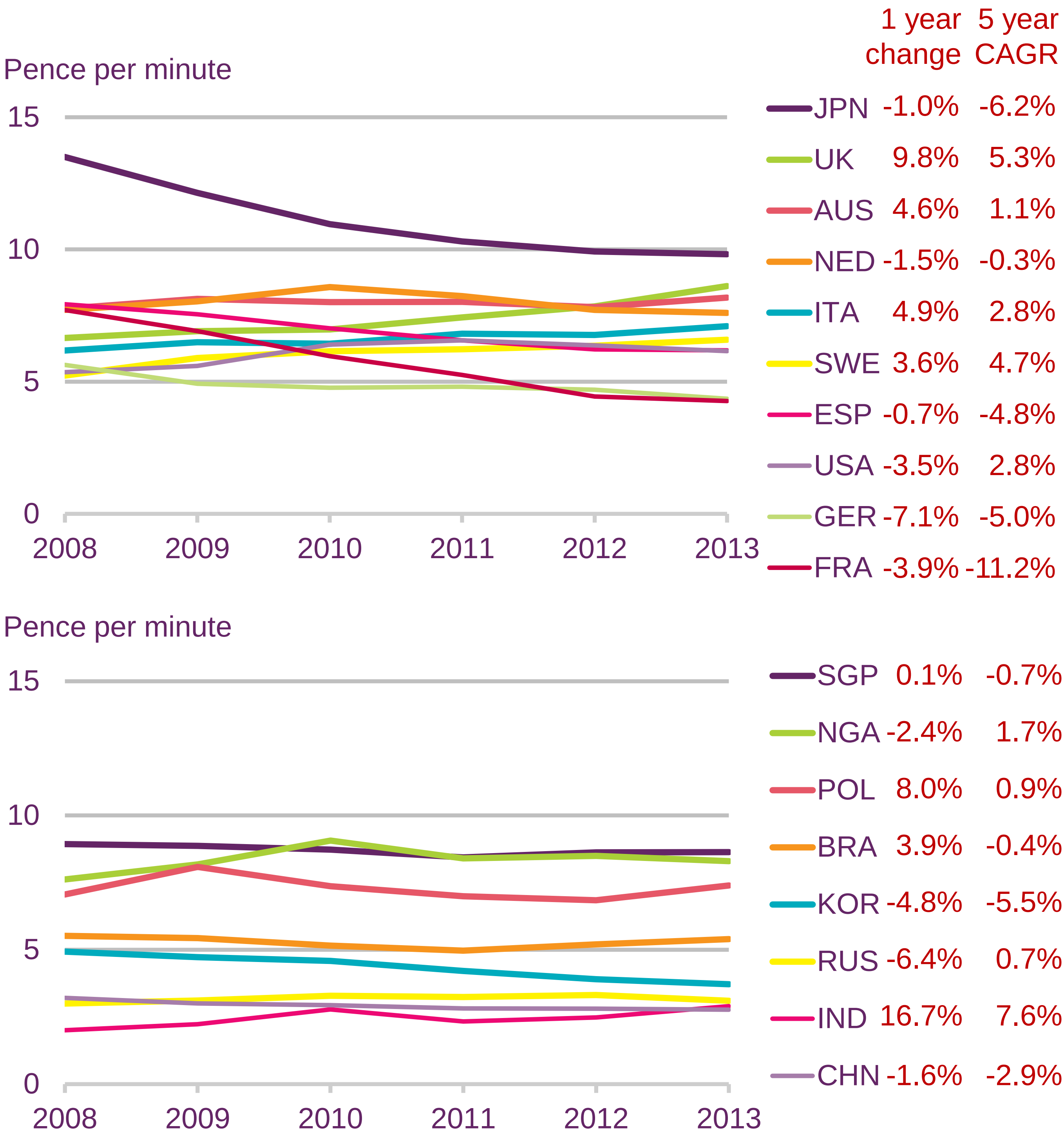
Figure 6.44

Average price of a fixed voice call minute: 2008 to 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP calls; figures for USA and CHN include incoming calls.

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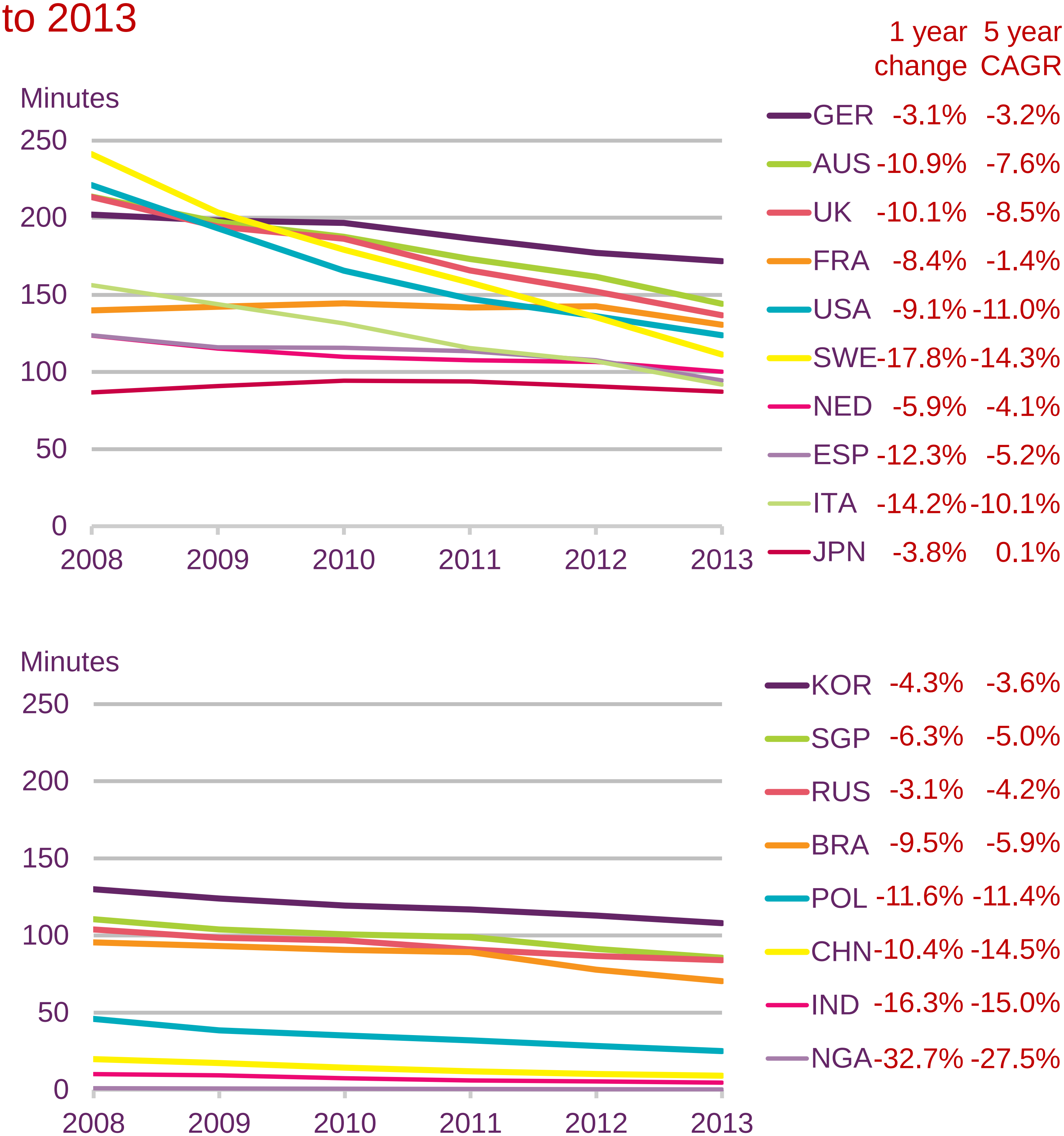
Figure 6.45

Per capita monthly fixed voice call minutes: 2008 to 2013



Source: IHS / industry data / Ofcom

Note: Includes managed VoIP calls; figures for USA and CHN include incoming calls.

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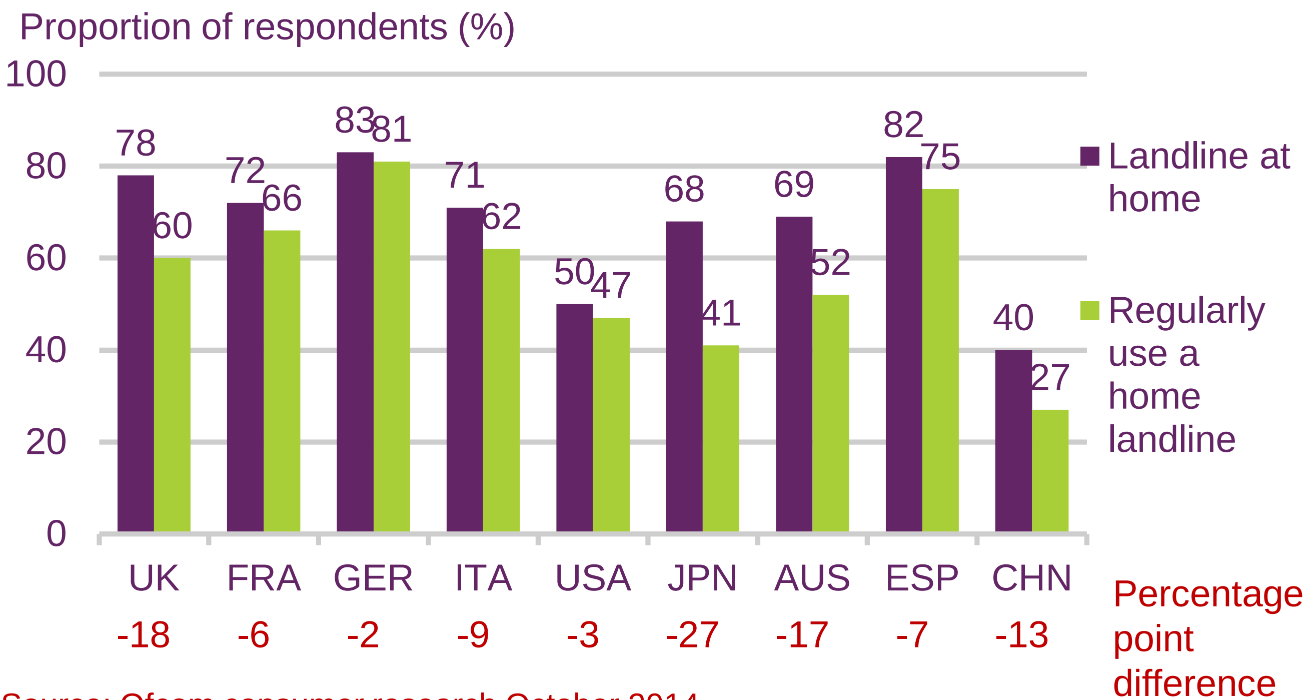
Figure 6.46

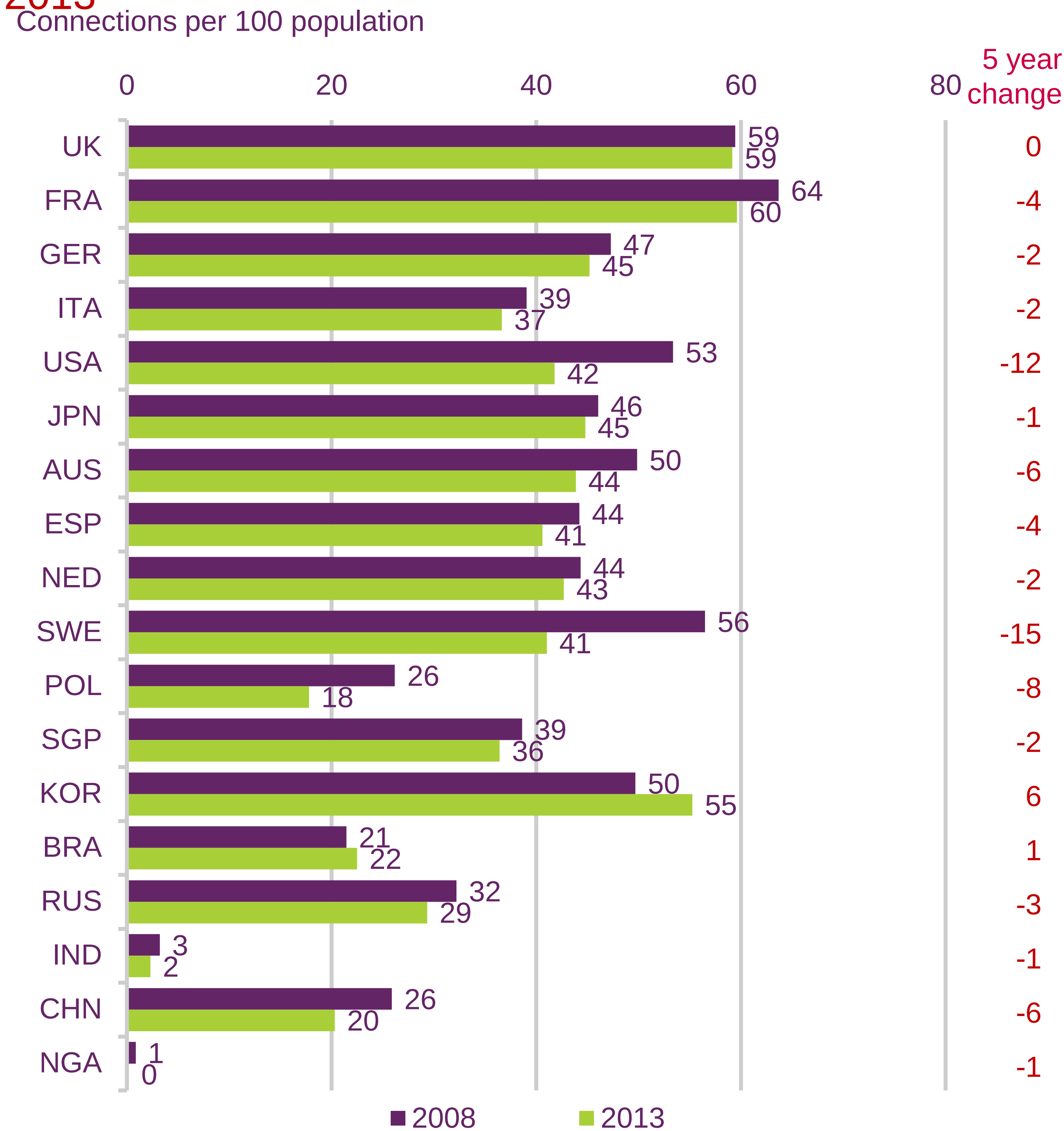
Household take-up and personal use of fixed telephony services



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.
Q3b. Which of the following SERVICES do you have in your home? Q9a. Which, if any, of the following internet activities do you use each of your devices for?

Figure 6.47

Fixed voice connections per 100 population: 2008 and 2013



Source: IHS / industry data / Ofcom
Note: Includes managed VoIP connections

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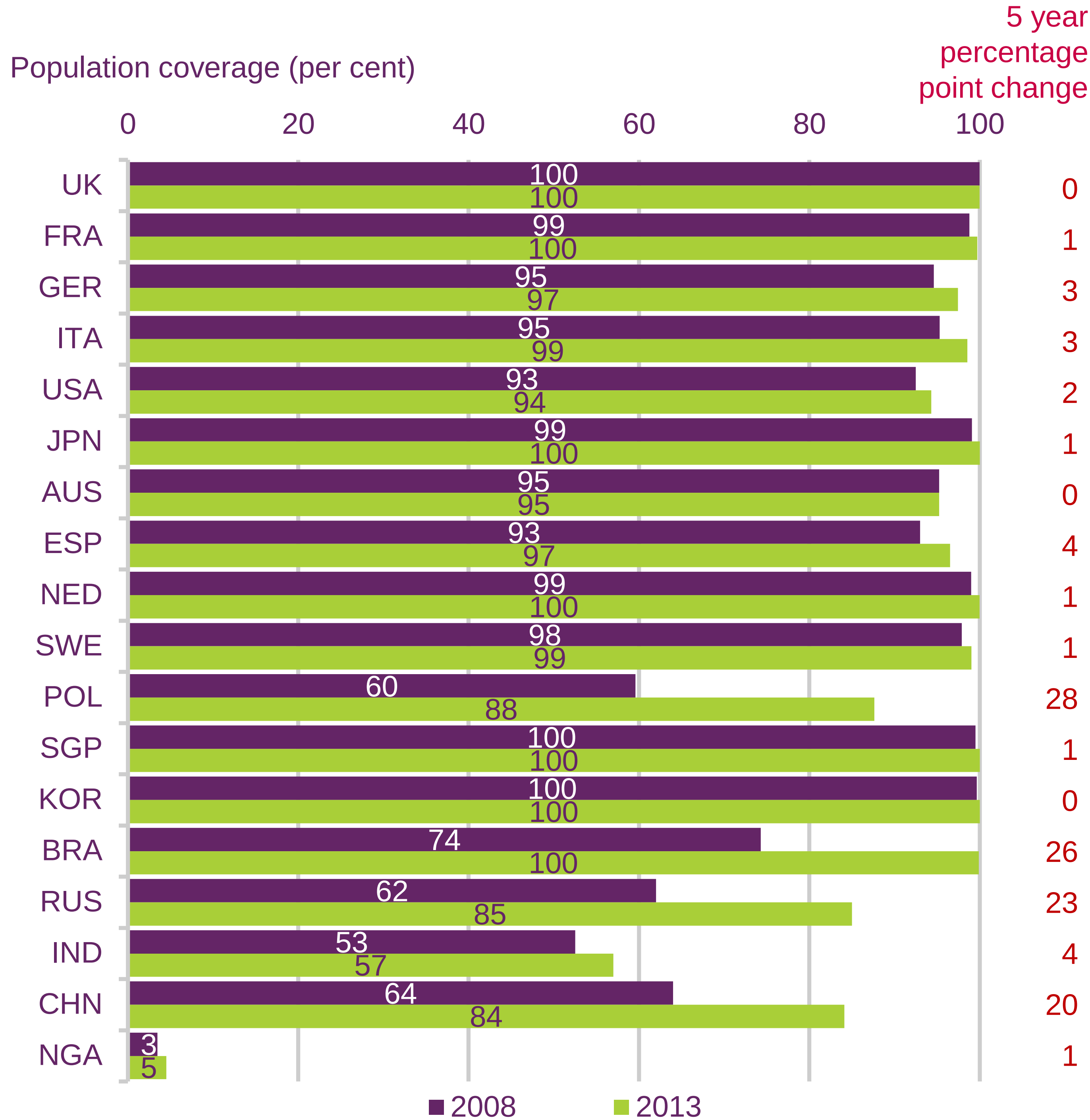
Figure 6.48

Fixed broadband availability: 2008 and 2013



Source: IHS / industry data / Ofcom

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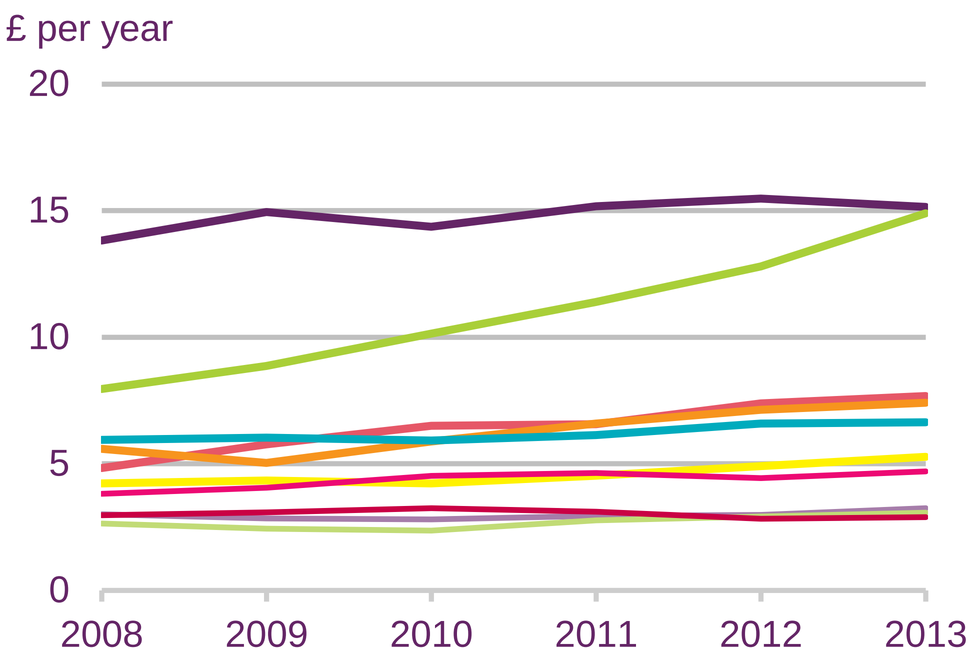
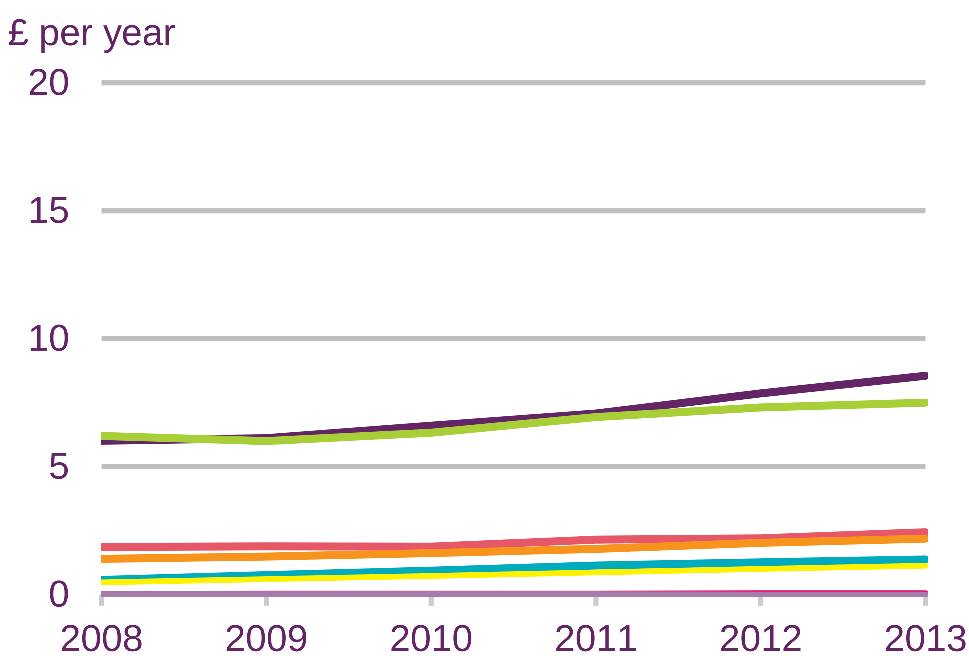
Figure 6.49

Average per-capita fixed broadband revenue: 2008 to 2013



	1 year change	5 year CAGR
AUS	-2.2%	1.8%
JPN	16.4%	13.4%
USA	3.8%	9.7%
SWE	3.9%	5.8%
NED	0.8%	2.2%
UK	7.4%	4.5%
ESP	5.9%	4.3%
GER	8.8%	1.6%
FRA	5.1%	3.0%
ITA	1.9%	-0.5%



	1 year change	5 year CAGR
SGP	8.7%	7.3%
KOR	2.4%	3.9%
BRA	10.8%	5.5%
POL	7.7%	9.4%
RUS	9.4%	19.1%
CHN	12.7%	18.8%
IND	12.3%	16.4%
NGA	-54.3%	-24.1%

Source: IHS / industry data / Ofcom

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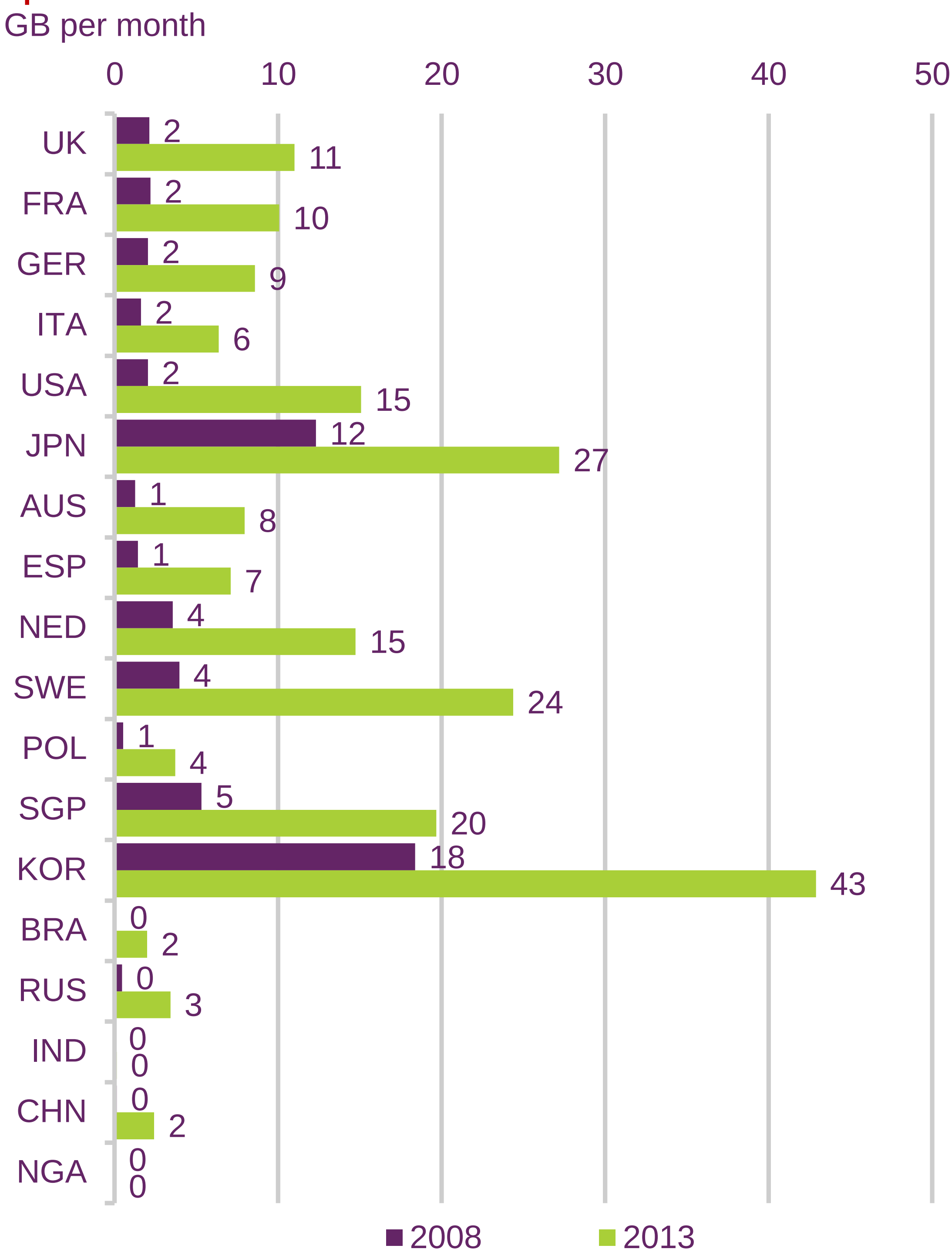
Figure 6.50

Average monthly fixed broadband data volume per person: 2008 to 2013



	1 year change	5 year CAGR
UK	36%	39%
FRA	36%	36%
GER	36%	33%
ITA	12%	32%
USA	15%	49%
JPN	25%	17%
AUS	33%	45%
ESP	20%	38%
NED	26%	33%
SWE	31%	44%
POL	35%	48%
SGP	23%	30%
KOR	10%	18%
BRA	49%	98%
RUS	26%	50%
IND	72%	84%
CHN	55%	78%
NGA	-51%	-2%

Source: IHS / industry data / Ofcom

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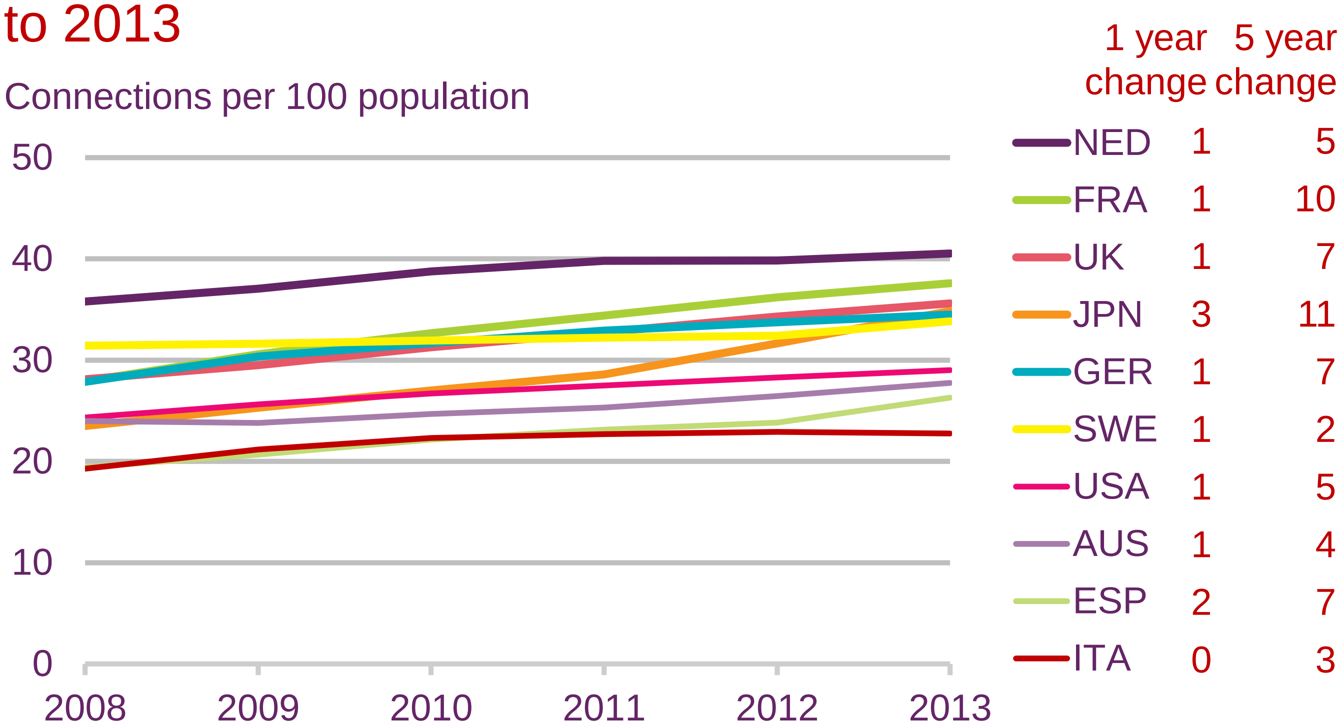
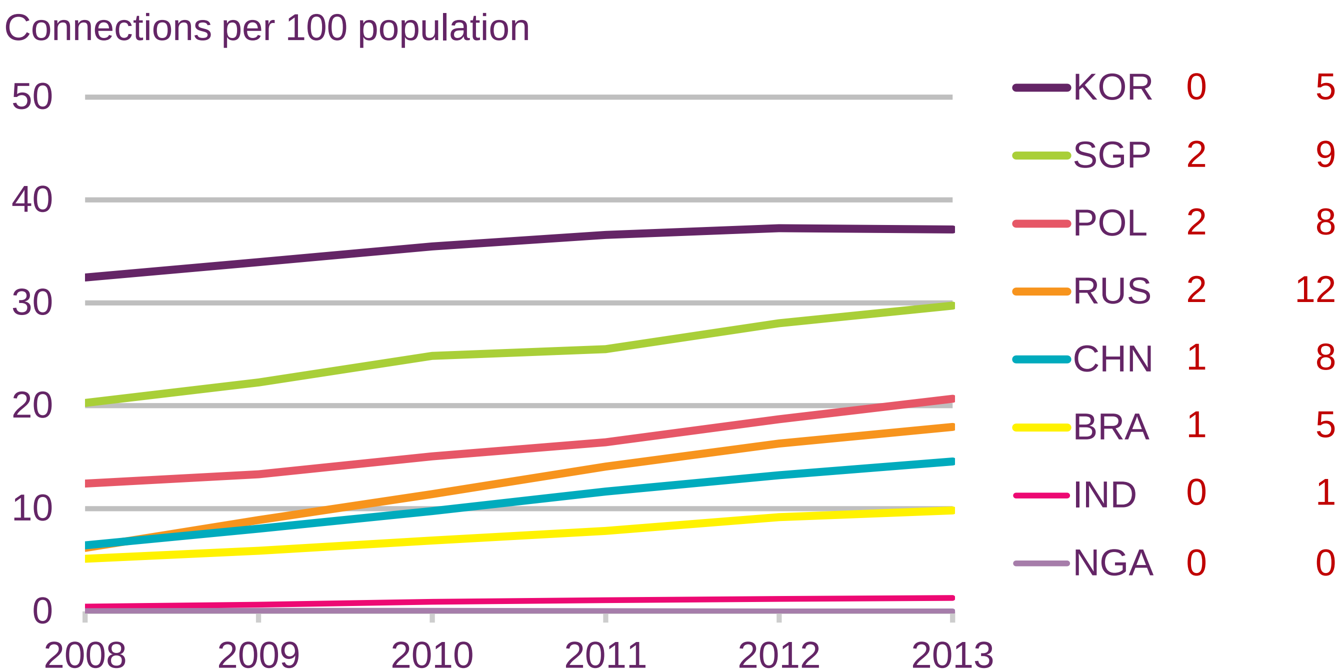
Figure 6.51

Fixed broadband connections per 100 population: 2008 to 2013





Source: IHS / industry data / Ofcom

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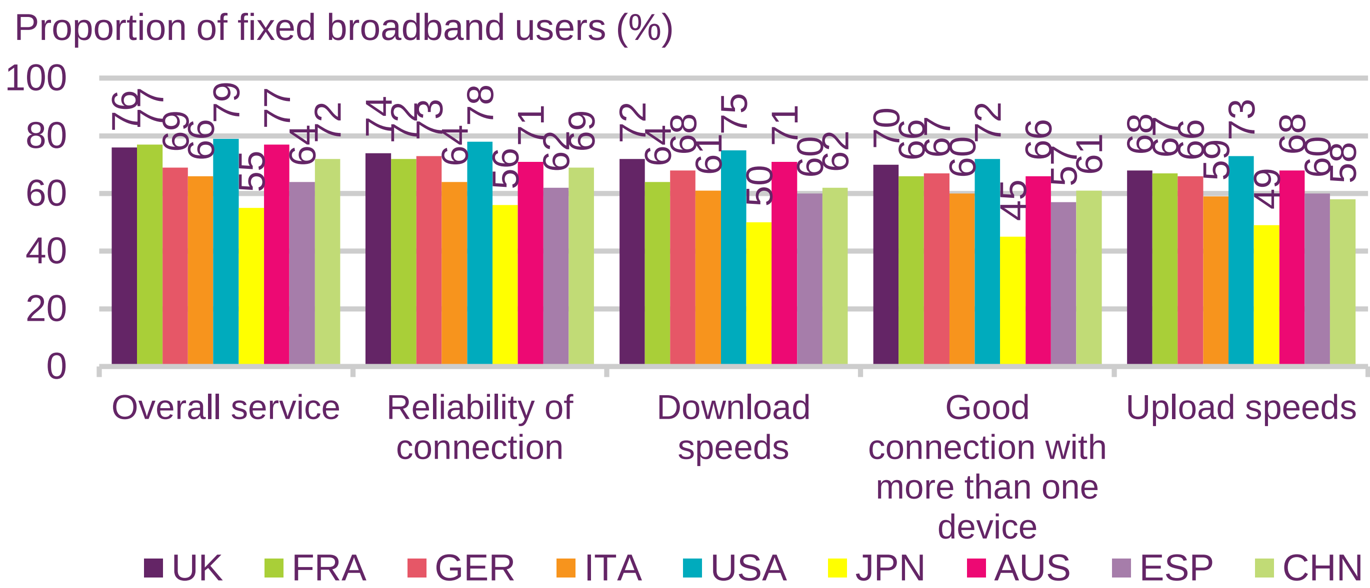
Figure 6.52

Satisfaction with fixed broadband service



Source: Ofcom consumer research October 2014

Base: All respondents with fixed broadband, UK=861, FRA=885, GER=738, ITA=640, USA=638, JPN=664, AUS=727, ESP=785, CHN=843

Q.30 To what extent are you satisfied or dissatisfied with the following aspects of your current home broadband service?

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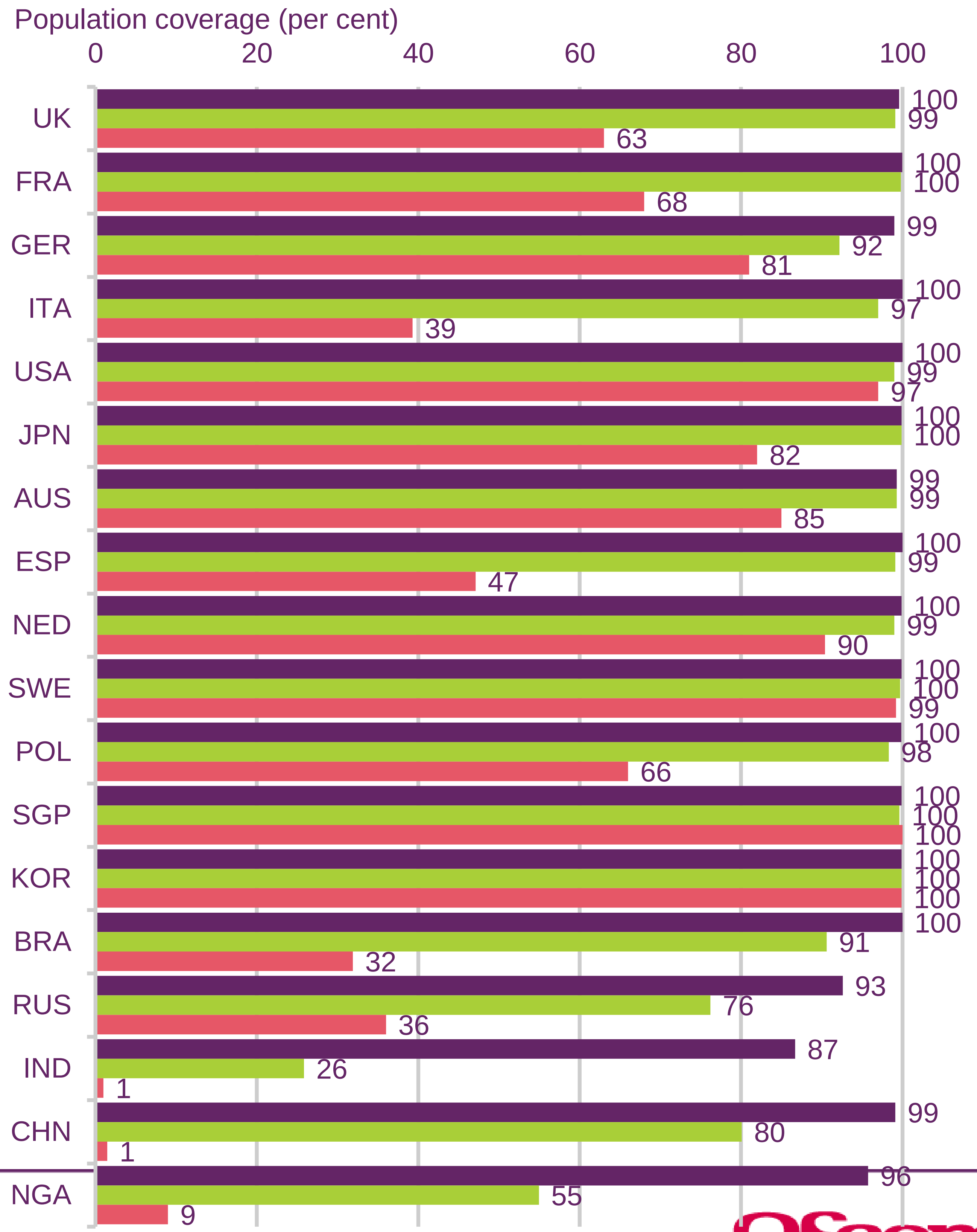
Figure 6.53

2G, 3G and LTE mobile network availability: end of 2013



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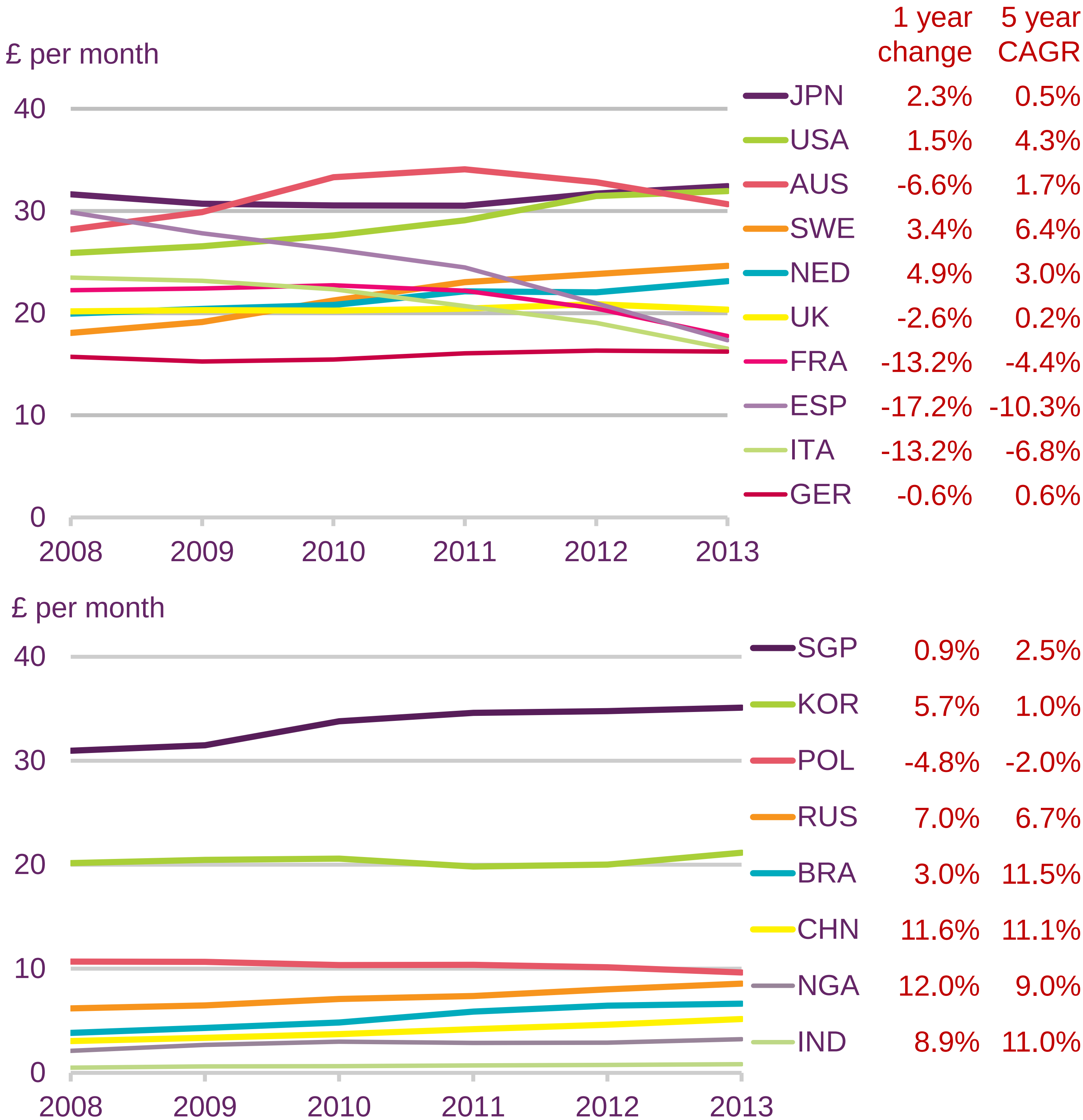
Source: IHS / industry data / Ofcom

Figure 6.54

Average per-capita monthly retail mobile revenue: 2008 to 2013



Source: IHS / industry data / Ofcom

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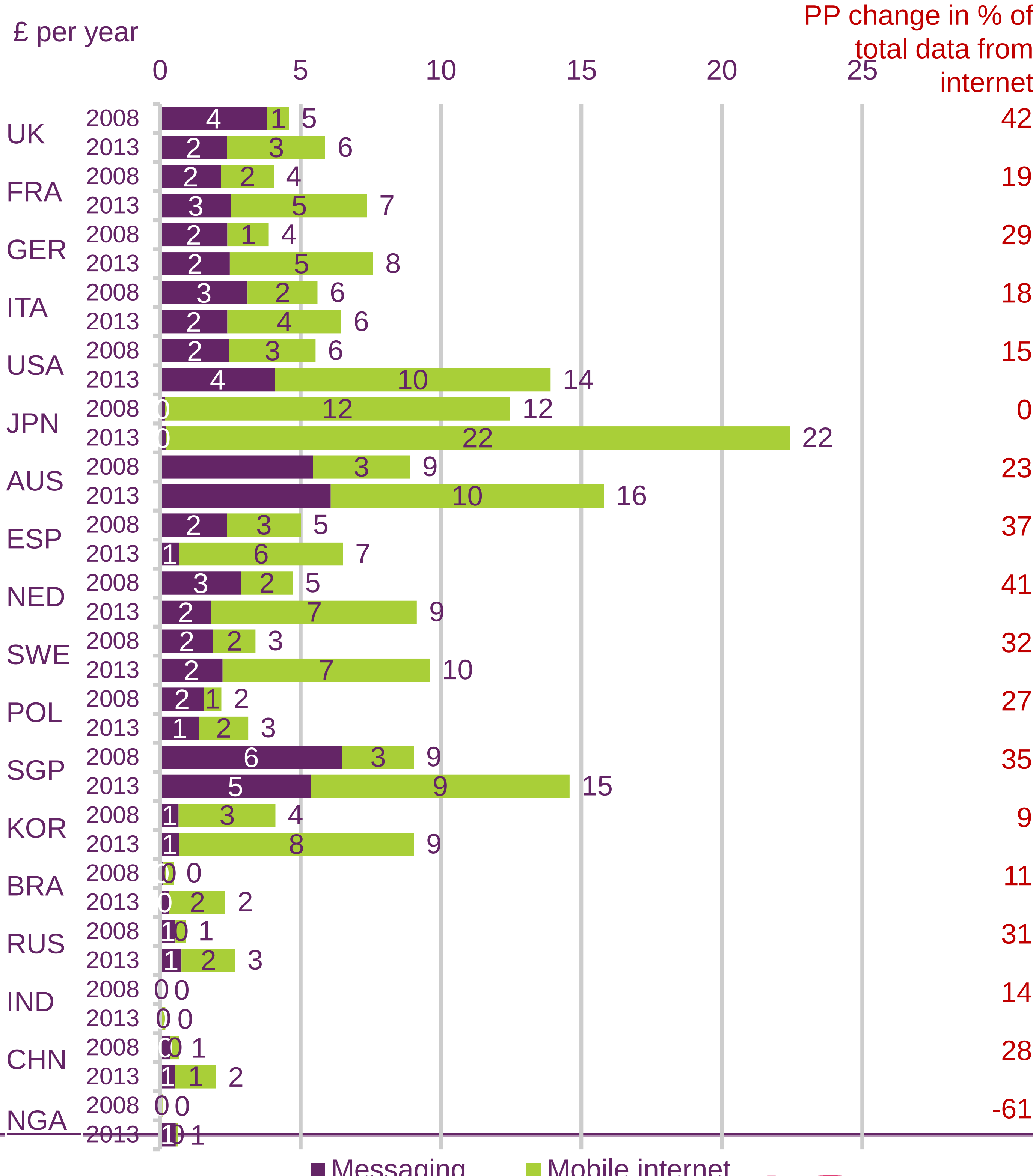
Figure 6.55

Per-capita mobile data average revenue: 2008 and 2013



Source: IHS / industry data / Ofcom
Note: Messaging includes SMS and MMS.

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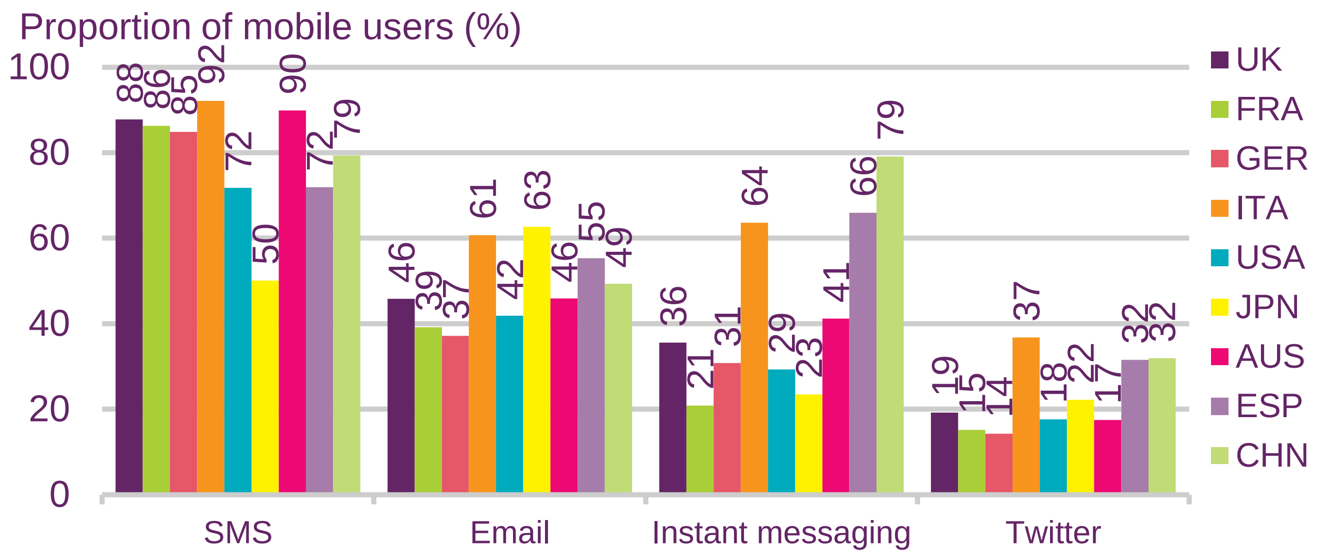
Figure 6.56

Use of data services on mobile phones



Source: Ofcom consumer research October 2014
Base: All respondents with a mobile phone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853.
Q9b. Which, if any, of the following ways of communicating over the internet do you use each of your devices for?
Q9e. Which, if any, of the following do you use your mobile phone or smartphone for?

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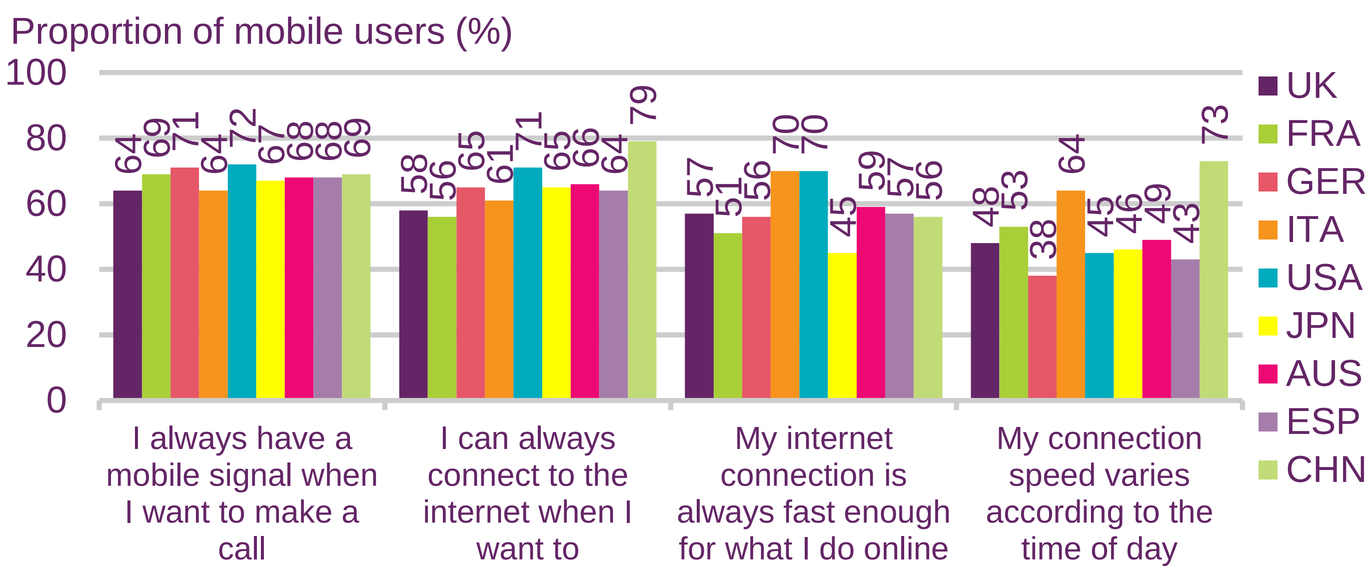
Figure 6.57
Mobile phone connectivity



Source: Ofcom consumer research October 2014
Base: All respondents with a mobile phone/ smartphone, UK=827, FRA=797, GER=861, ITA=890, USA=748, JPN=801, AUS=869, ESP=866, CHN=853
Q.10 Thinking about when you use your mobile phone, please select an answer to each of the following...

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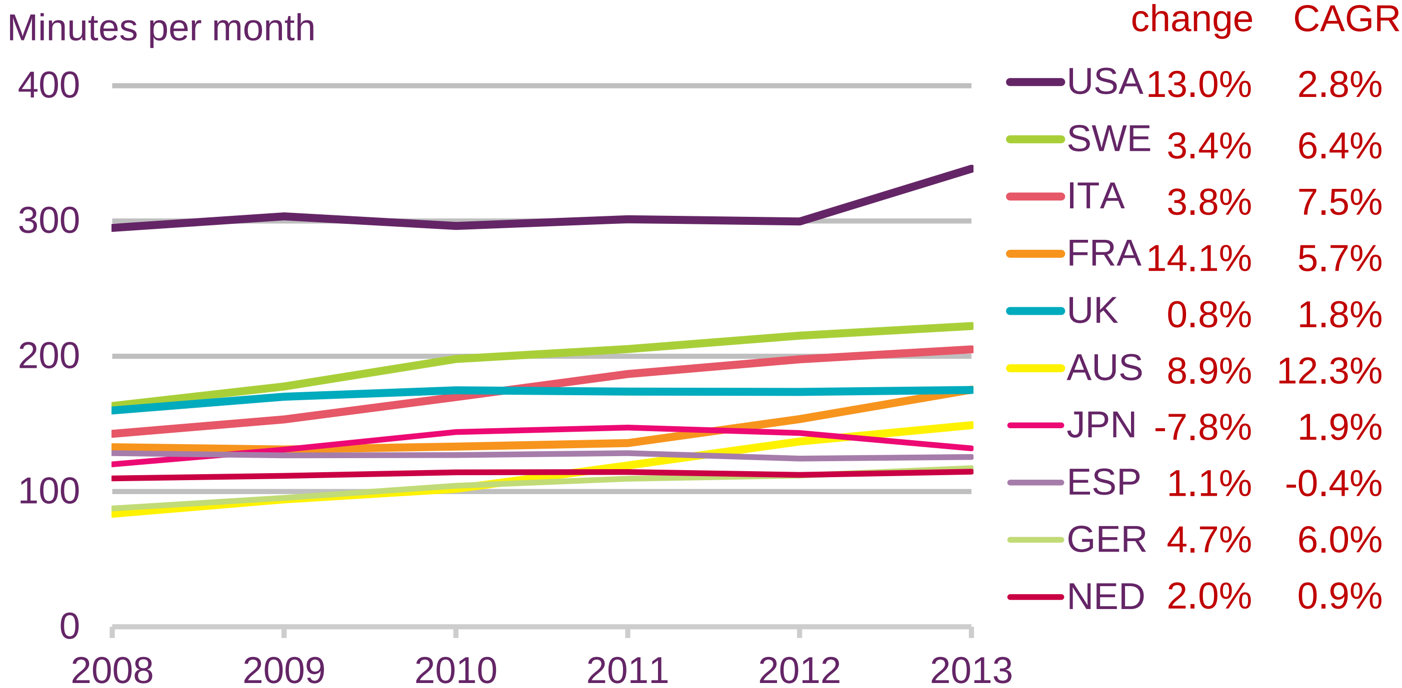
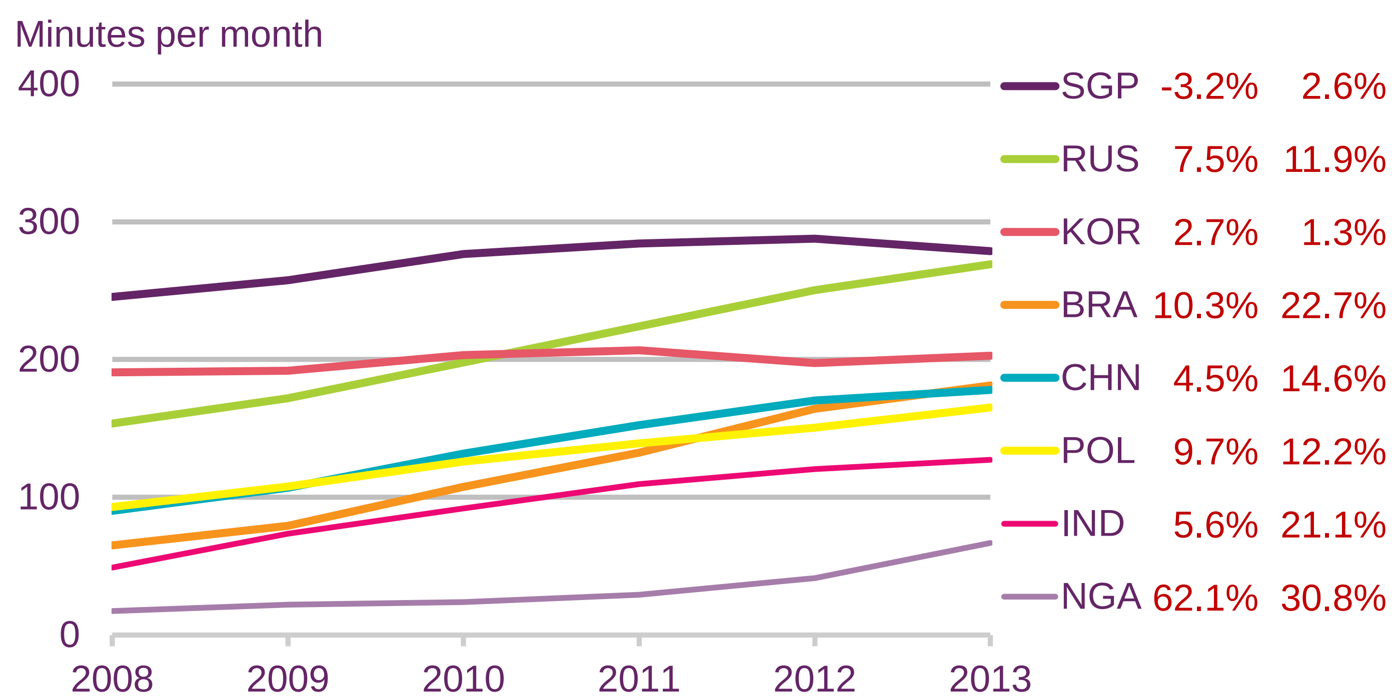
Figure 6.58

Average per-capita monthly mobile voice call minutes: 2008 to 2013





Source: IHS / industry data / Ofcom

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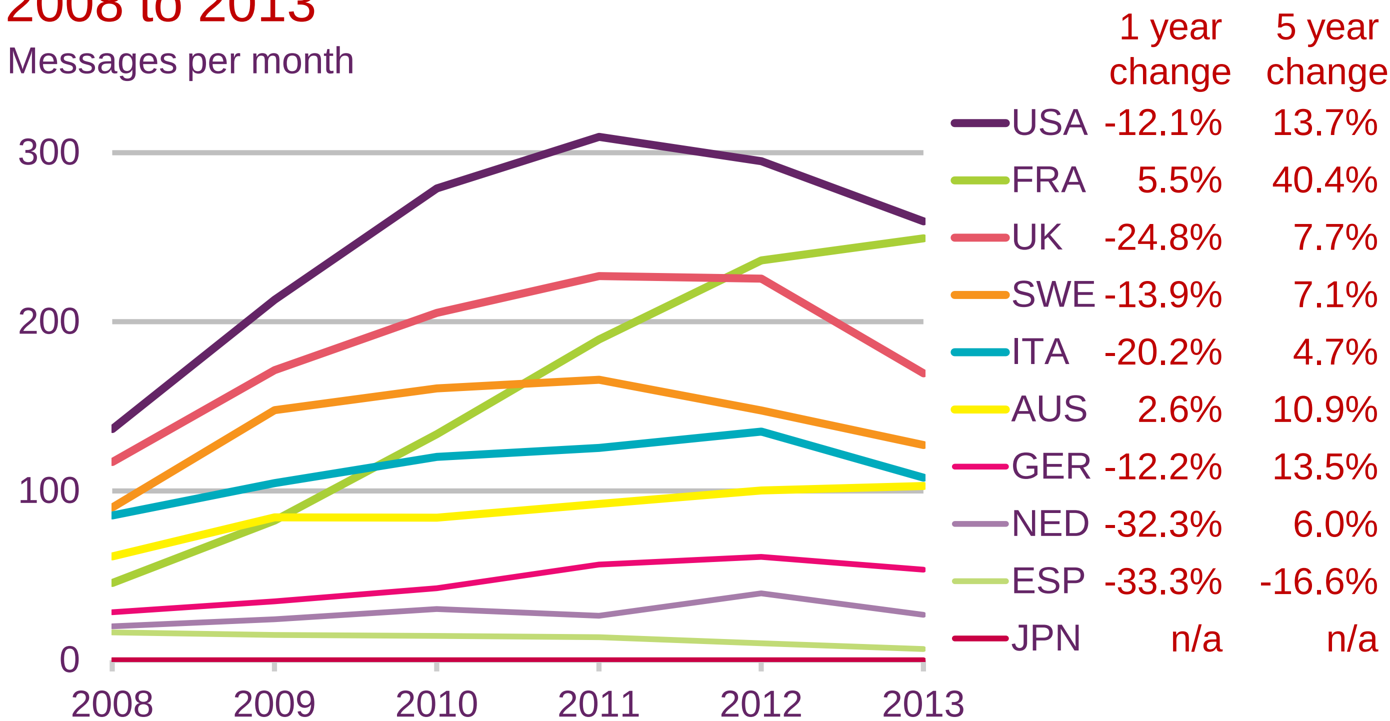
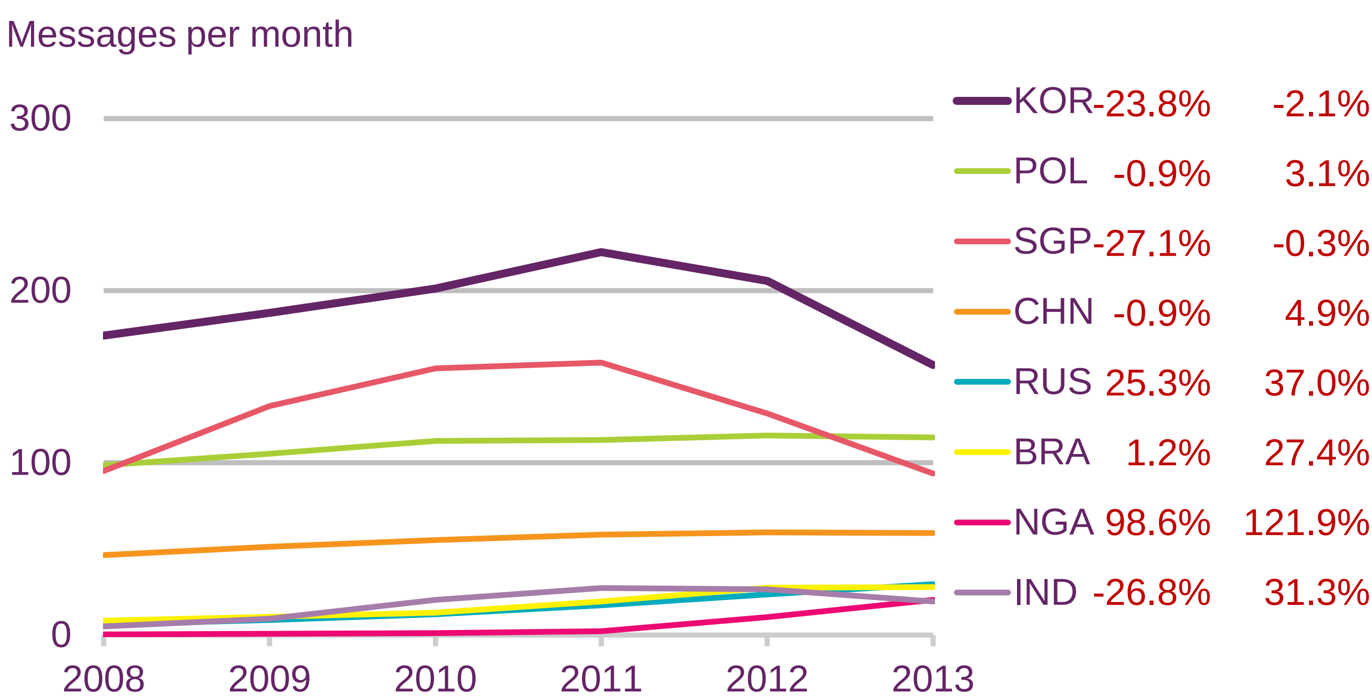
Figure 6.59

Average number of monthly mobile messages per head: 2008 to 2013

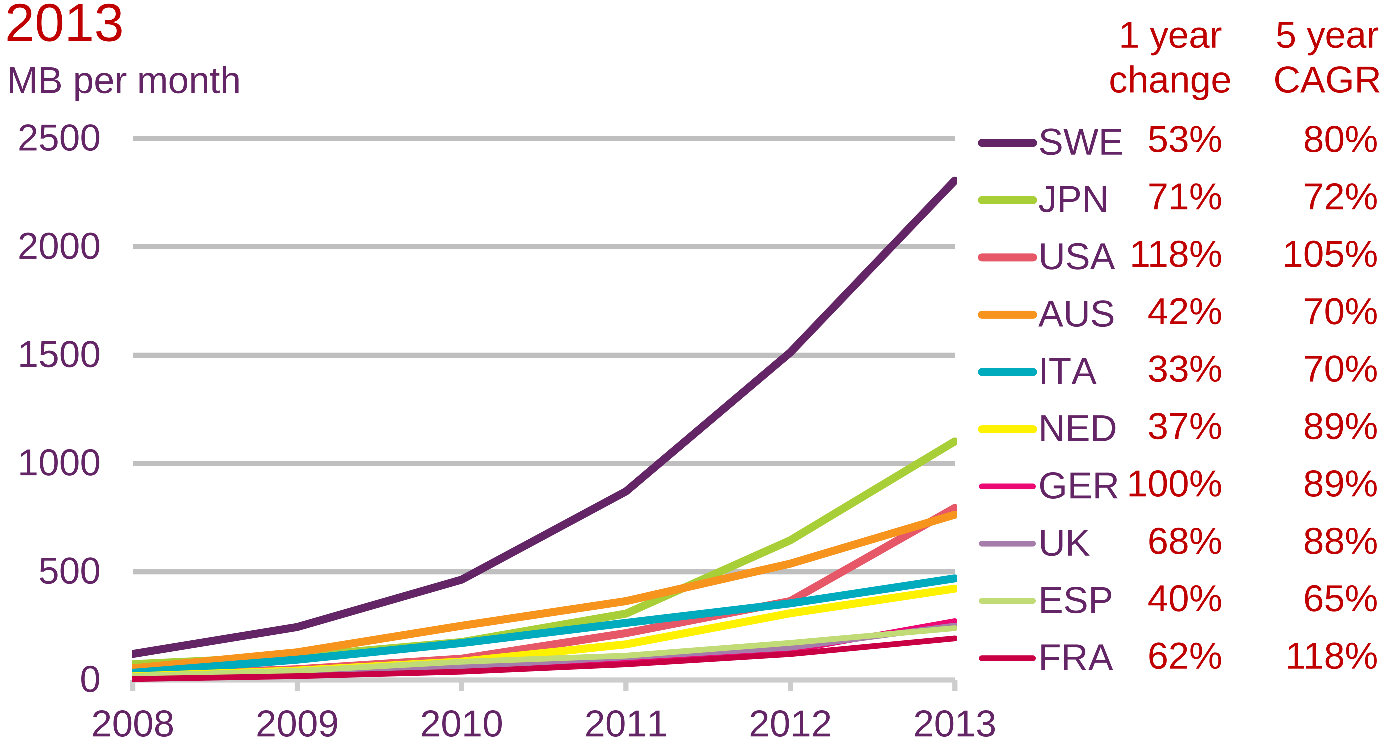


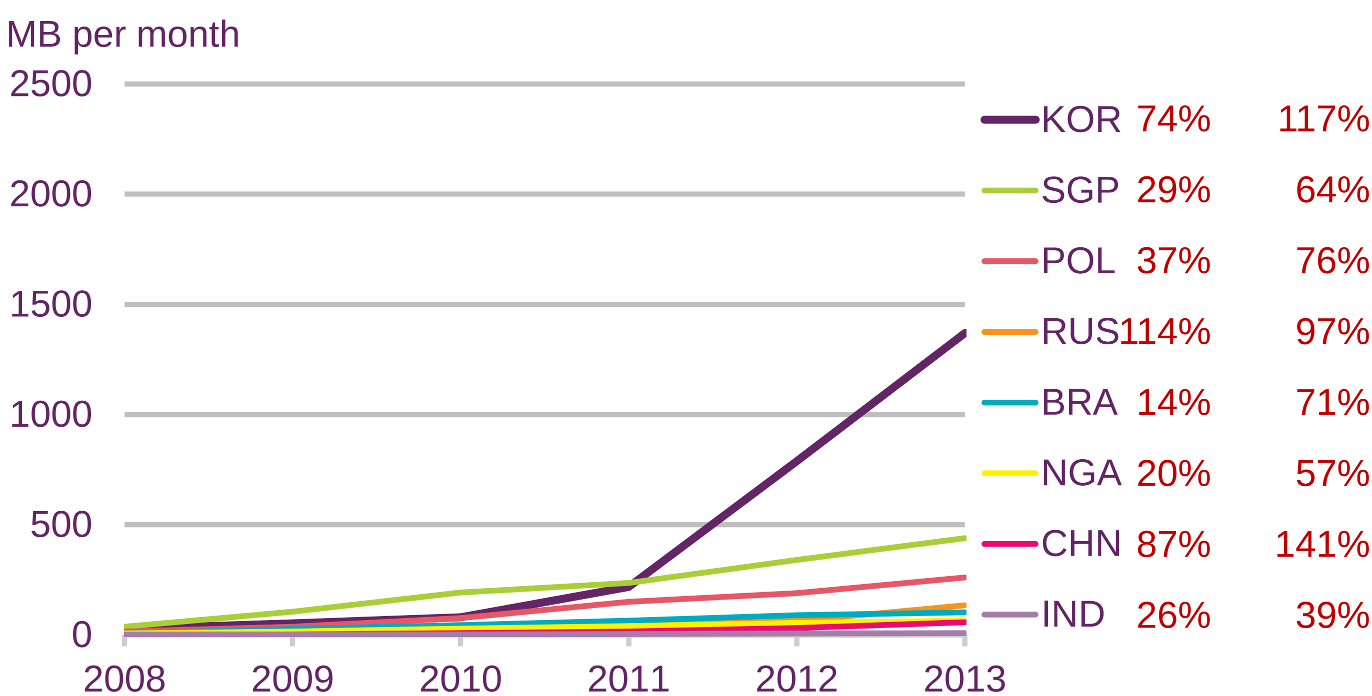


Source: IHS / industry data / Ofcom

Figure 6.60

Average per-capita monthly mobile data use: 2008 to 2013

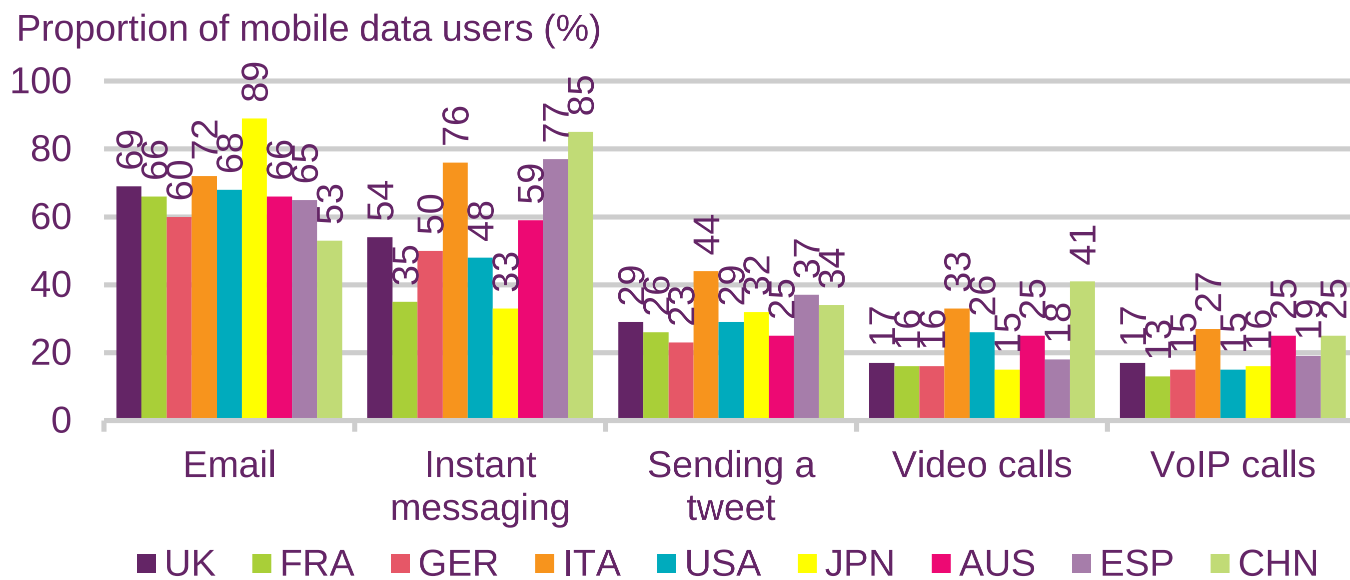




Source: IHS / industry data / Ofcom

Figure 6.61

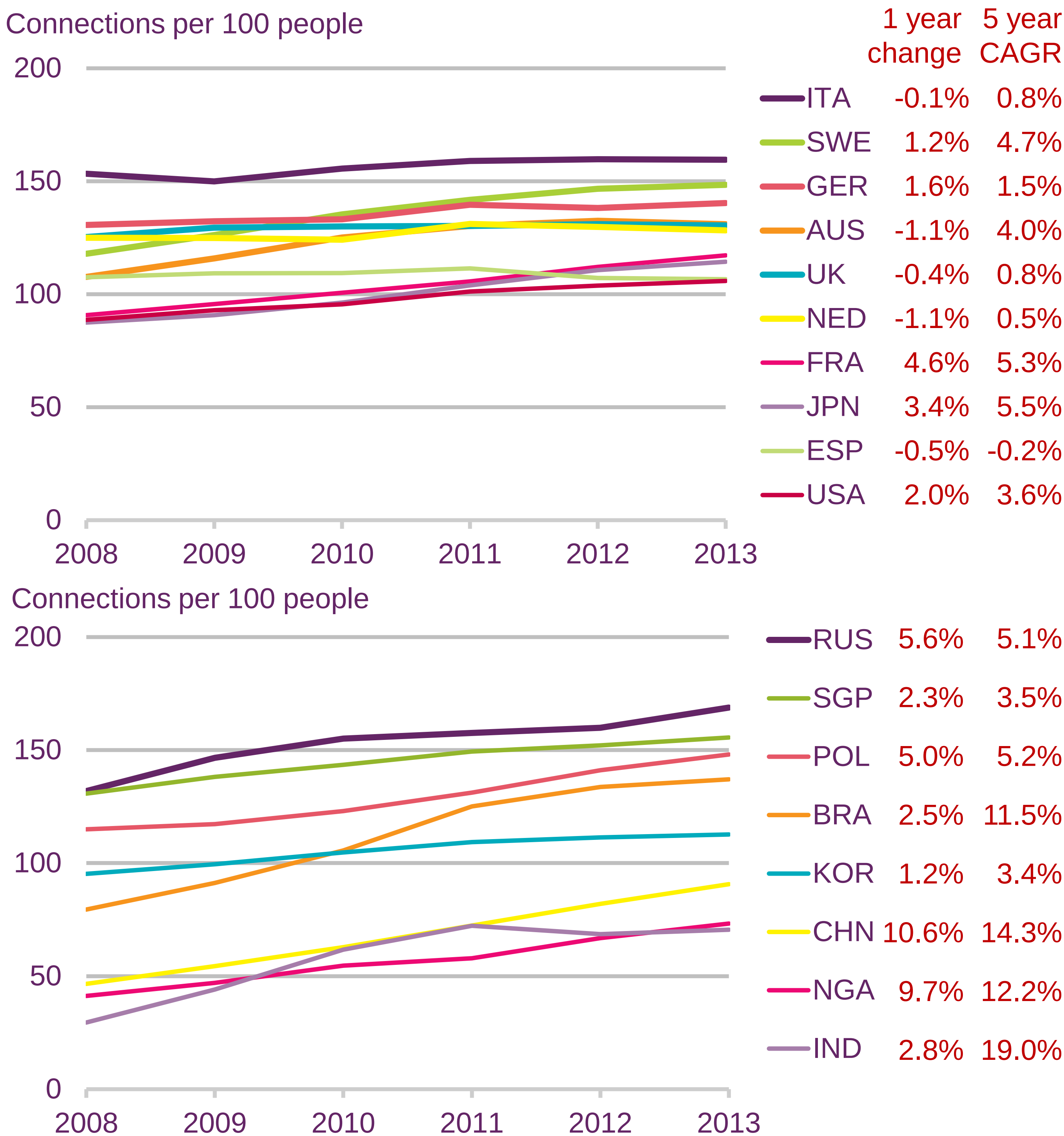
Activities undertaken on a mobile phone



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
Q.9b Which, if any, of the following ways of communicating over the internet do you use each of your devices for?

Figure 6.62

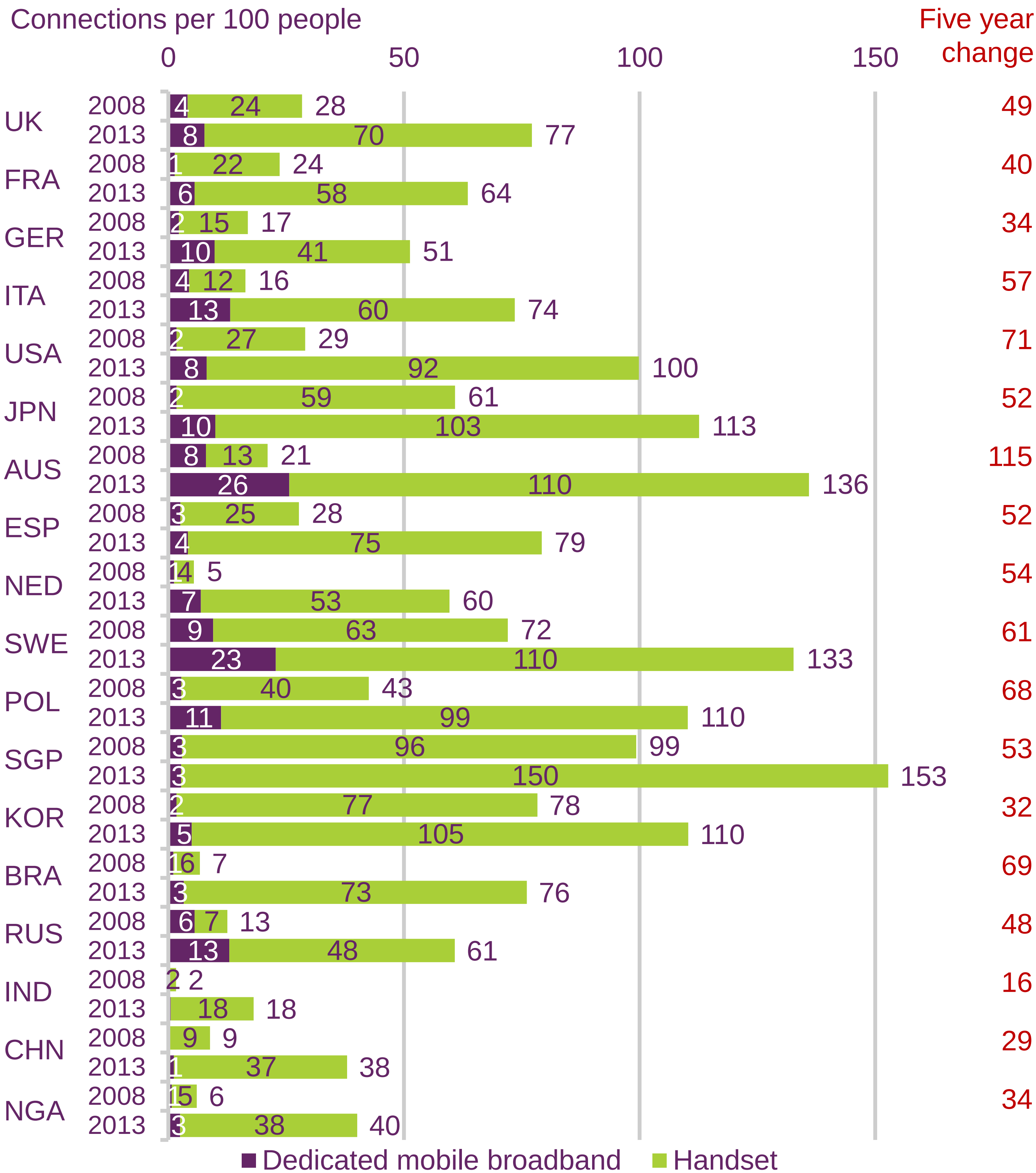
Mobile connections per 100 people: 2008 to 2013



Source: IHS / industry data / Ofcom

Figure 6.63

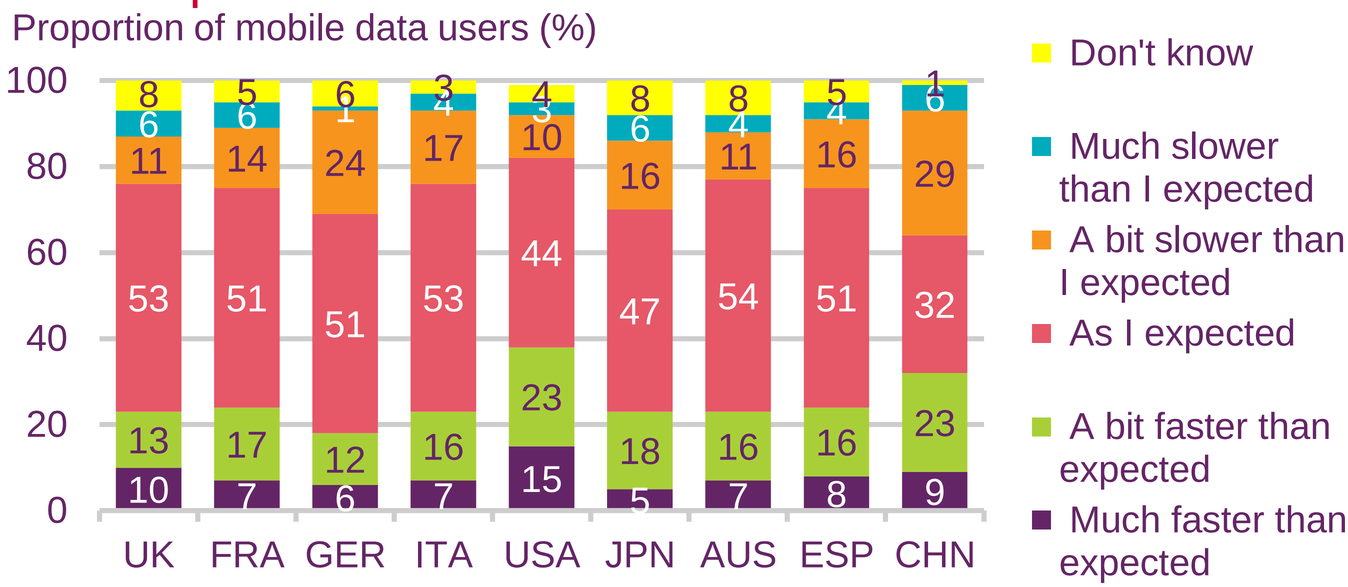
Mobile data connections per 100 people: 2008 and 2013



Source: IHS / industry data / Ofcom
Note: Messaging includes SMS and MMS.

Figure 6.64

Performance of mobile internet connection compared to initial expectation

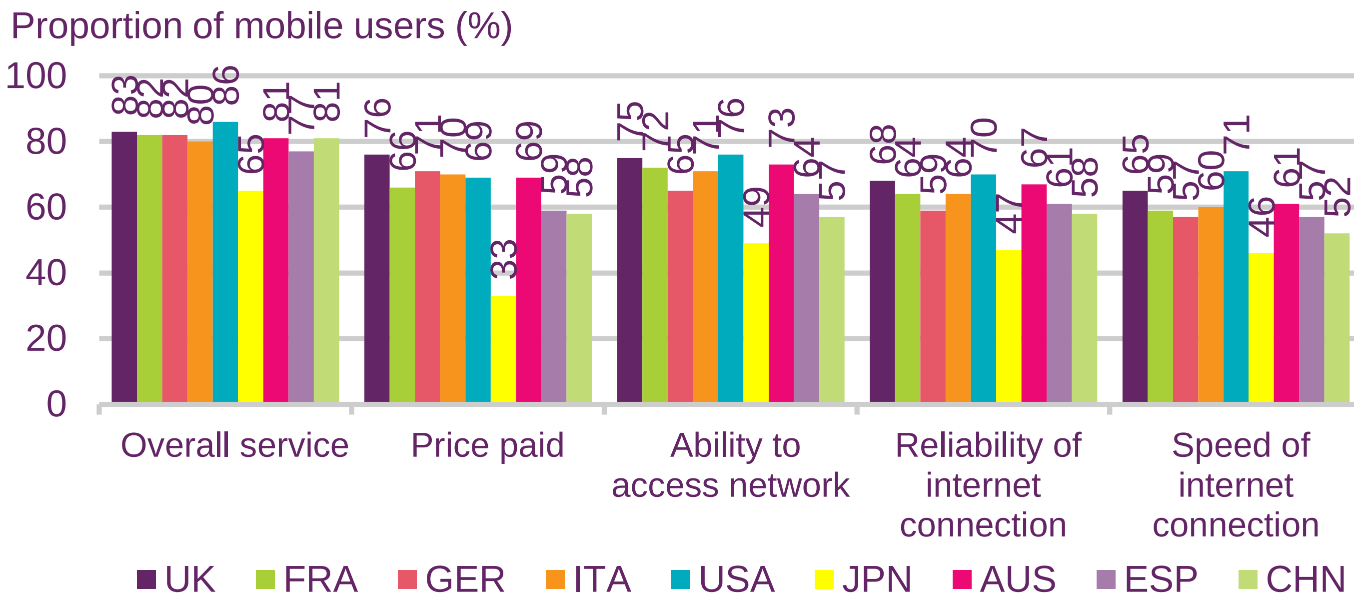


Source: Ofcom consumer research October 2014

Base: All respondents with mobile broadband internet access or those who access the internet access via a mobile handset, UK=339, FRA=361, GER=383, ITA=662, USA=284, JPN=250, AUS=464, ESP=620, CHN=568

Q.26 How does the download speed of your current mobile internet connection compare with what you expected when you signed up for it?

Figure 6.65
Satisfaction with mobile service



Source: Ofcom consumer research October 2014
Base: All respondents with mobile broadband internet access or those who access the internet access via a mobile handset, UK=339, FRA=361, GER=383, ITA=662, USA=284, JPN=250, AUS=464, ESP=620, CHN=568
Q.25 To what extent are you satisfied or dissatisfied with the following aspects of your mobile phone service?

International Communications Market Report 2014 – Post

11 December 2014

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Figure 7.1

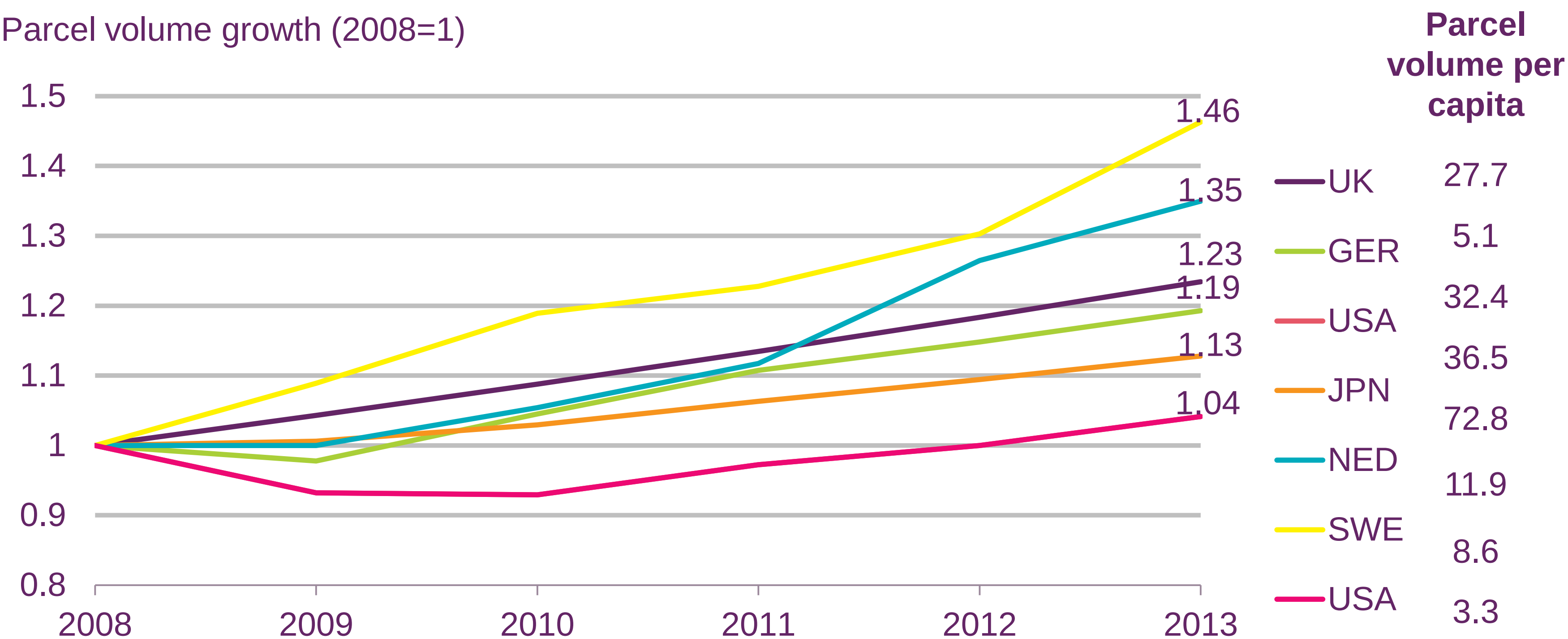
Industry metrics and summary

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHI
Domestic addressed mail revenues (£bn)	7.5	7.1	7.2	3.1	30.0	11.7	1.4	1.5	2.2	1.1	0.8	0.1	16.0	2.3	0.6	0.4	1.5
Mail revenues per capita (£)	117.3	108.7	88.0	51.0	94.5	91.5	58.4	32.5	132.4	116.2	19.6	23.9	32.4	11.6	4.3	0.3	1.1
Domestic mail volumes (billion items)	14.8	15.4	16.1	3.6	153.2	18.5	4.5	4.1	3.8	2.6	1.8	0.7	4.4	8.4	3.5	5.4	26.9
Mail volumes per capita	230.4	234.6	196.1	59.4	483.4	145.5	193.4	87.1	228.8	265.9	47.1	120.5	89.9	41.9	24.5	4.3	19.8
Standard (C5) domestic stamp price (£)	0.62	1.40	1.23	1.78	1.03	0.92	0.86	0.78	1.63	1.18	0.48	0.26	n/a	0.5	0.78	0.27	0.62
Average number of items sent in a month	3.9	4.2	4.4	3.3	4.9	2.5	3.6	2.1	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	3.4

Source: WIK / Ofcom analysis / Ofcom consumer research October 2014
Note: Standard letter is based on C5 envelope, 229x162x5 <=100g
Values converted from the local currency unit to British Sterling (£1 = €1.177 / US$1.563 / JPY¥152.606 / AUS$1.619 / SEK10.183 / PLN4.941 / SGD$1.956/ KRW₩ 1711.543/ BRL3.371/ RUB49.789/ INR91.588 / CNY¥ 9.685/ NGN₦ 242.685
Note: Average number of items sent in a month is based on the findings of our consumer research and includes residential consumers only

Figure 7.2

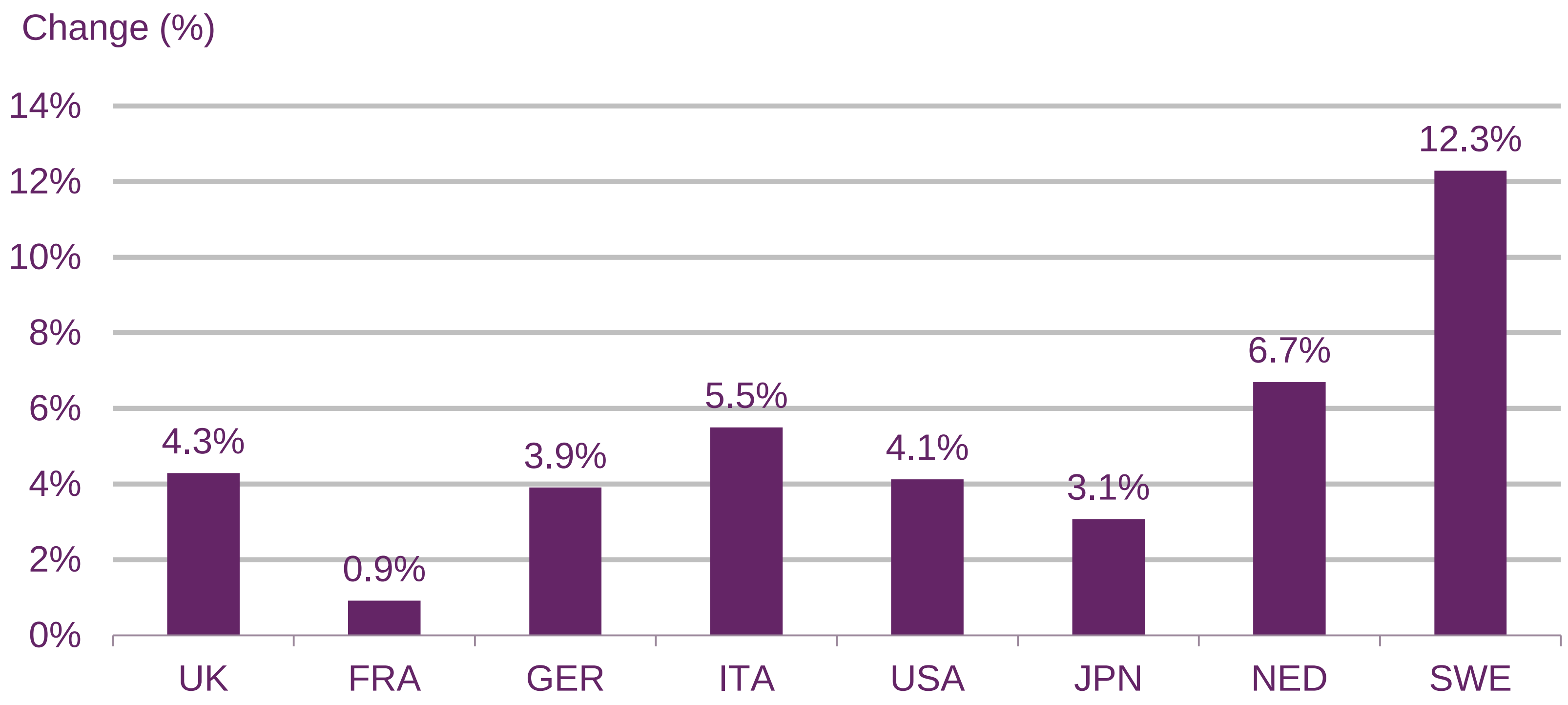
Parcel volume growth: 2008-2013



Source: WIK / Ofcom analysis

Figure 7.3

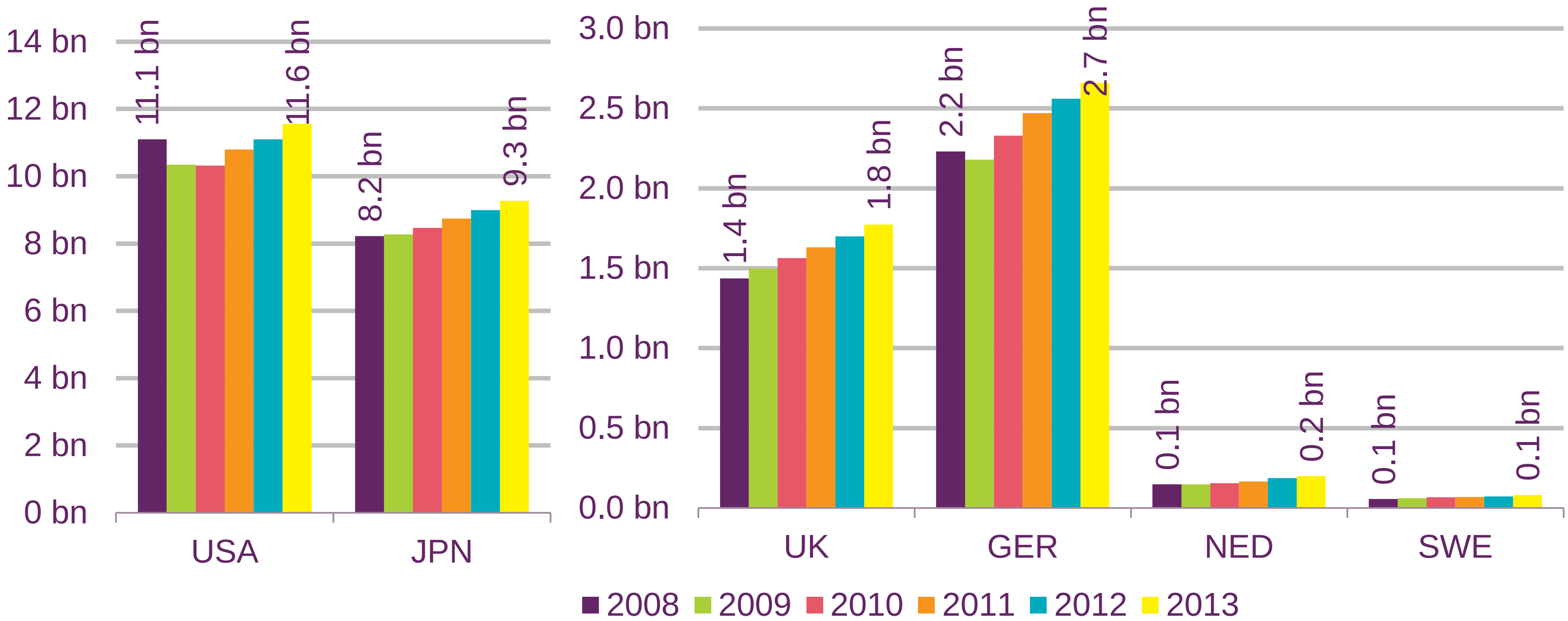
Proportional change in parcel volume: 2012-2013



Source: WIK / Ofcom analysis

Figure 7.4
Parcel volumes: 2008-2013

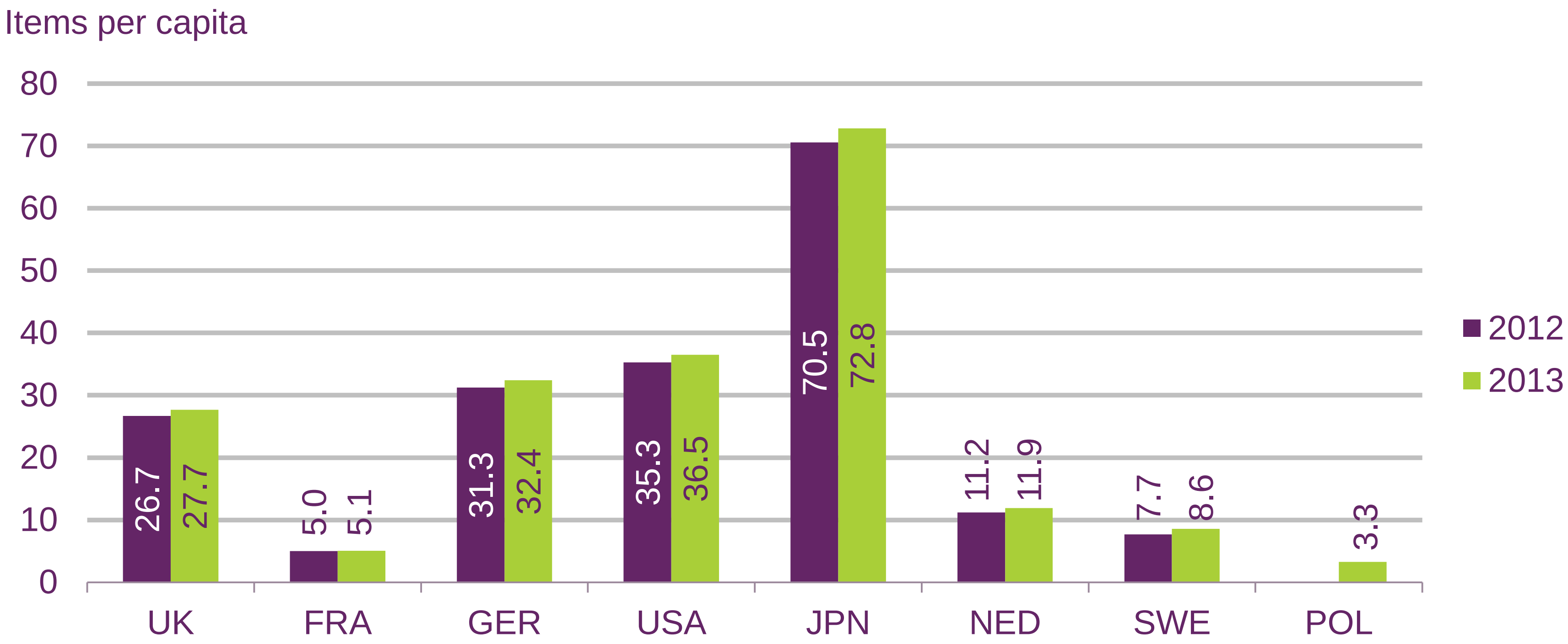
Parcel volume (billion items)



Source: WIK / Ofcom analysis

Figure 7.5

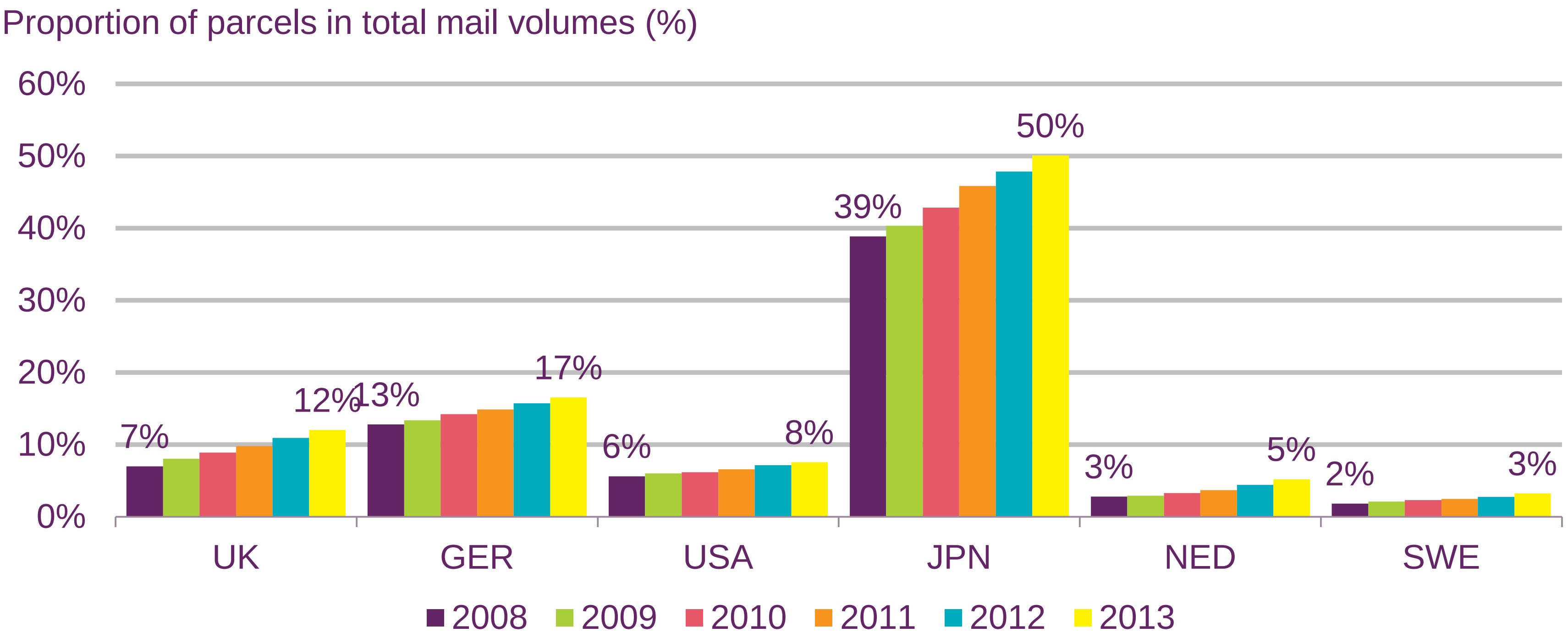
Parcel volume per head of population



Source: WIK / Ofcom analysis

Figure 7.6

Proportion of parcels in total mail: 2008-2013

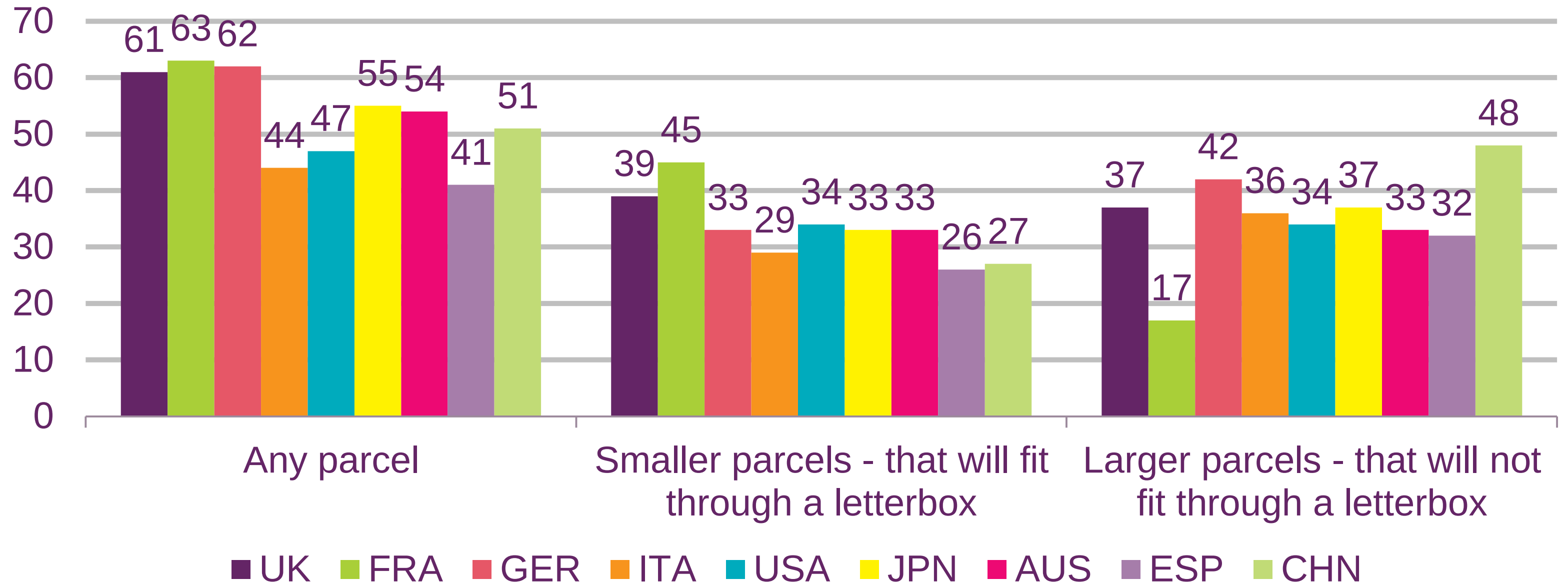


Source: WIK / Ofcom analysis

Figure 7.7

Proportion of residential consumers who claim to have received a parcel in the past month

All respondents who have received any parcel in the last month (%)

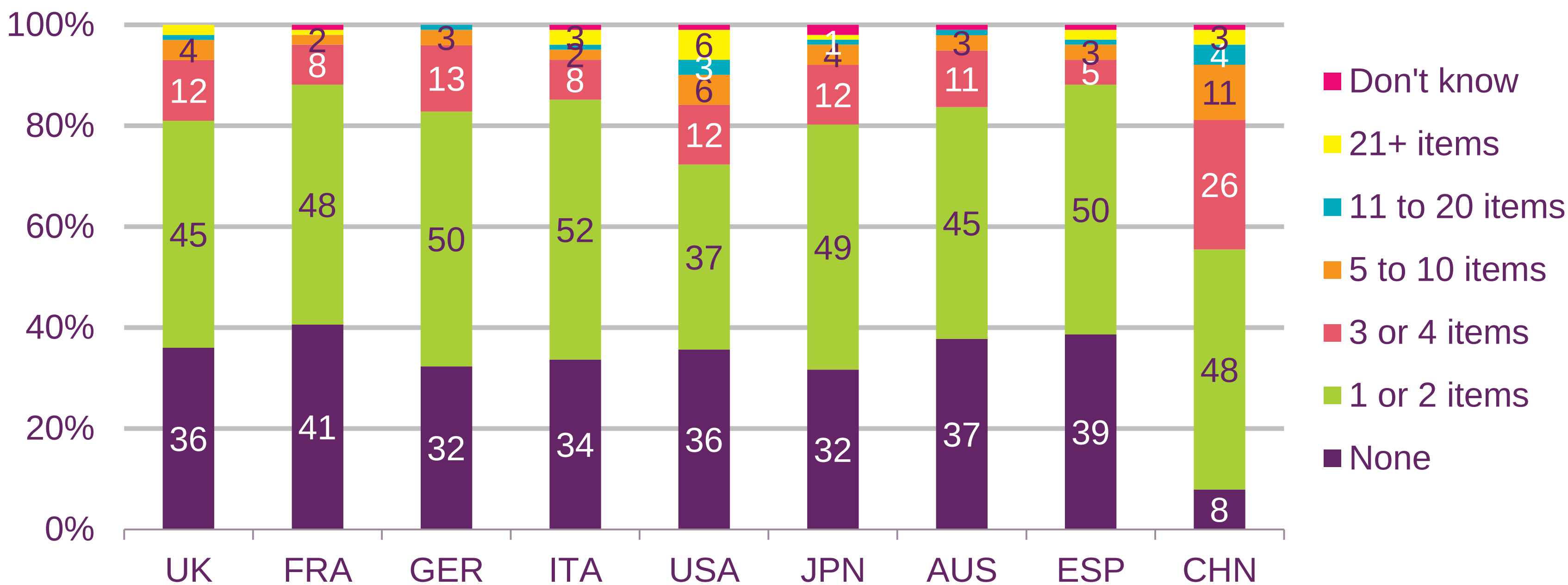


Source: Ofcom consumer research October 2014
Base: All respondents, UK=888, FRA=896, GER=883, ITA=767, USA=739, JPN=838, AUS=865, ESP=700, CHN=810
Q.16 Which of these types of items would you say you have personally received through the post in the last month?

Figure 7.8

Approximate number of parcels received in previous week

Respondents who have received any parcels in the last week (%)



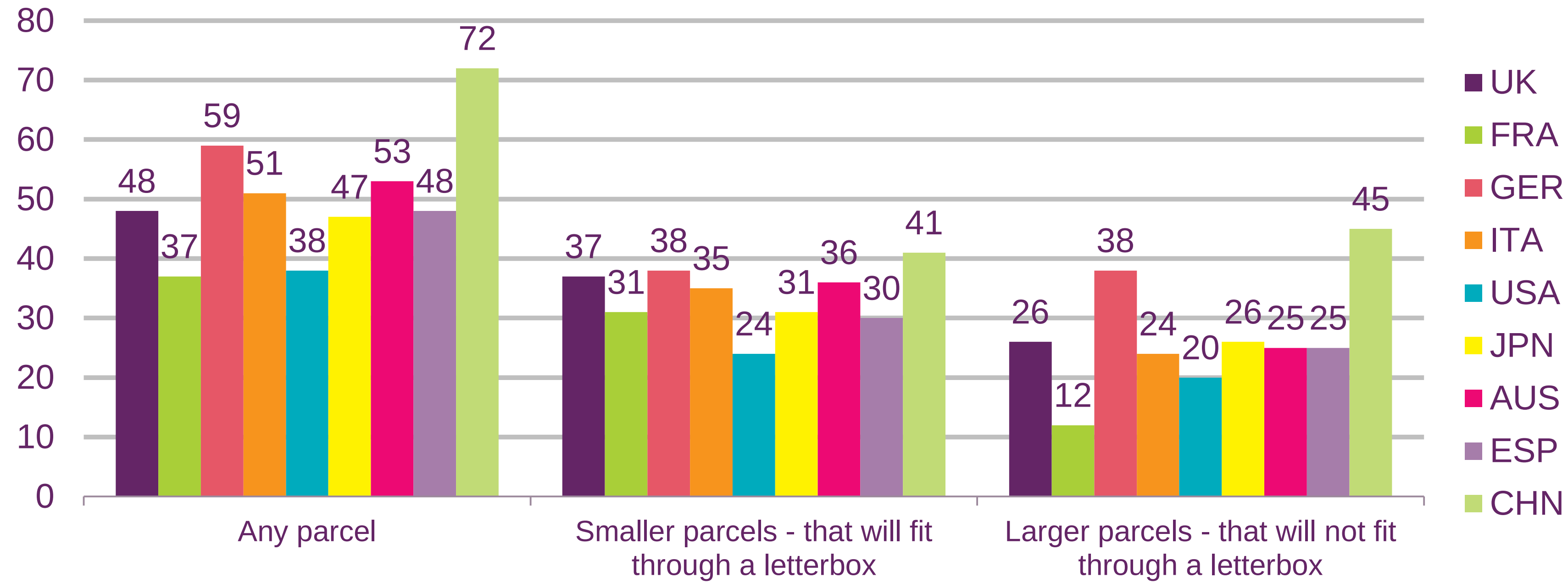
Mean number of parcels:	2.0	1.5	1.9	2.1	3.8	1.9	1.8	2.1	4.2

Source: Ofcom consumer research October 2014
Base: All respondents who have received any items of post in the last week, UK=888, FRA=896, GER=883, ITA=767, USA=739, JPN=838, AUS=865, ESP=700, CHN=810
Q.15 Approximately how many of these items you received in the last week were parcels i.e. items that wouldn't easily fit through a standard household letterbox?

Figure 7.9

Types of parcels sent in last month

All respondents who have sent any parcel in the last month (%)



Source: Ofcom consumer research October 2014
Base: All respondents who have sent any items of post in the last month, UK=684, FRA=795, GER=785, ITA=577, USA=618, JPN=527, AUS=623, ESP=401, CHN=613
Q.13 Which of these types of mail would you say you have personally sent in the last month by post?

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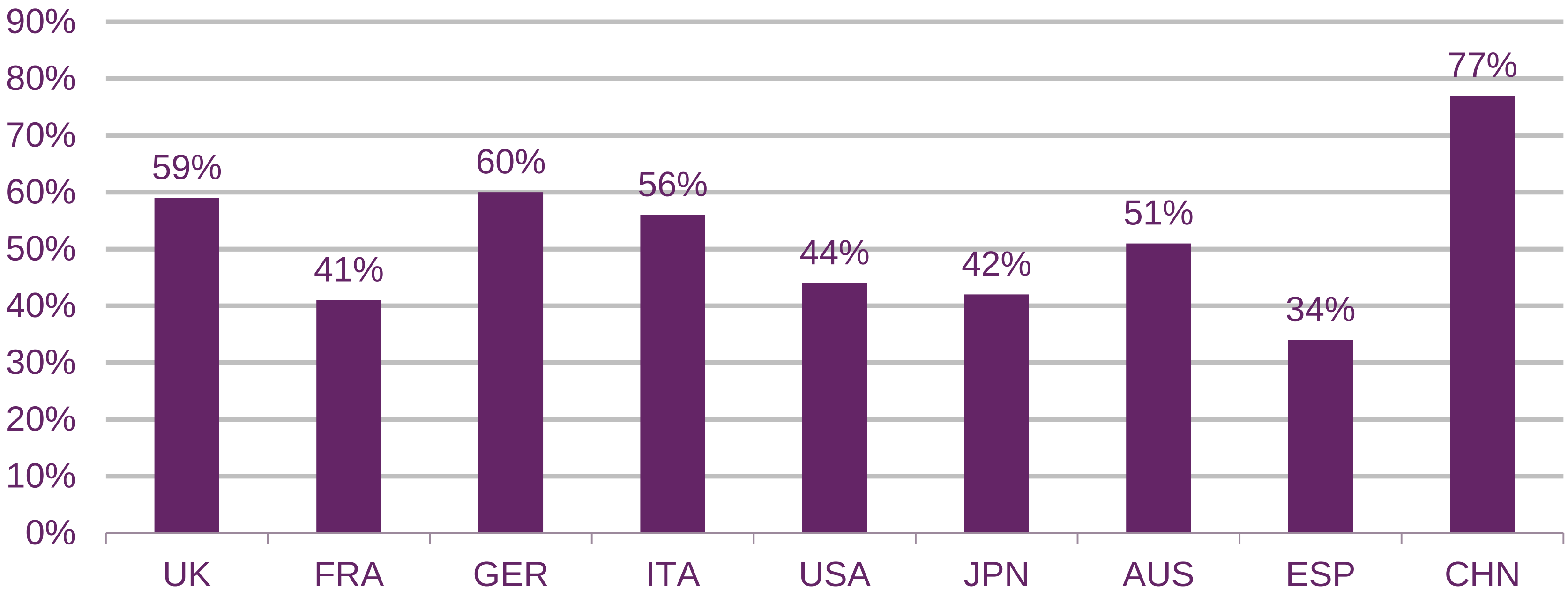
Figure 7.10

Use of online shopping at least once per week

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?

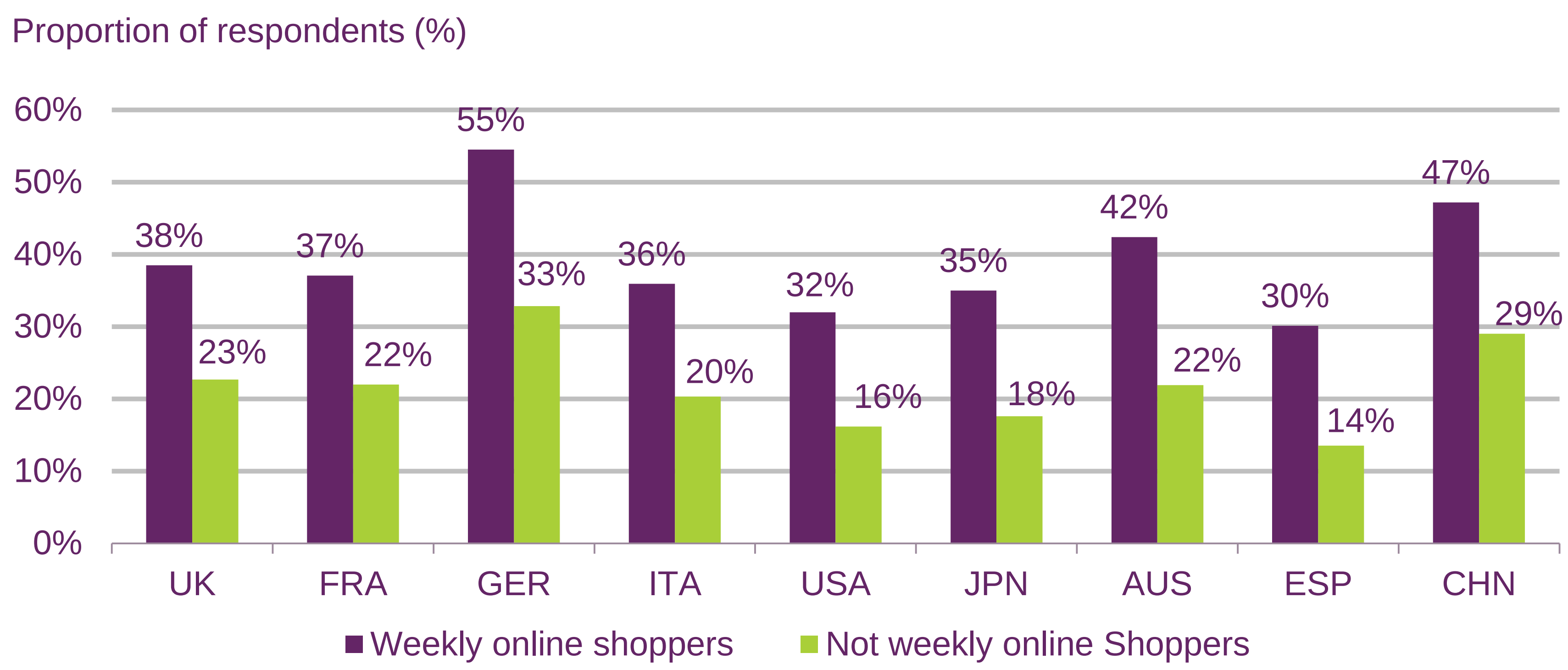
Figure 7.11

Proportion of online shoppers and not online shoppers who have received a parcel in the last week

Source: Ofcom consumer research October 2014
Base: All who shop online at least once a week / don't shop online at least once a week, UK=597/414, FRA=428/599, GER=603/403, ITA=559/447, USA=451/549, JPN=423/580, AUS=505/495, ESP=343/659, CHN=784/226
Q.13 Which of these types of mail would you say you have personally sent in the last month by post? - NET: Parcels
Q8 Which, if any, of the following activities do you use your internet connection for AT LEAST ONCE A WEEK? Online shopping

Figure 7.12

Proportion of online shoppers and not online shoppers who have sent a parcel in the past month



Source: Ofcom consumer research October 2014
Base: All who shop online at least once a week / don't shop online at least once a week, UK=597/414, FRA=428/599, GER=603/403, ITA=559/447, USA=451/549, JPN=423/580, AUS=505/495, ESP=343/659, CHN=784/226
Q.13 Which of these types of mail would you say you have personally sent in the last month by post? - NET: Parcels
Q8 Which, if any, of the following activities do you use your internet connection for AT LEAST ONCE A WEEK? – Online shopping

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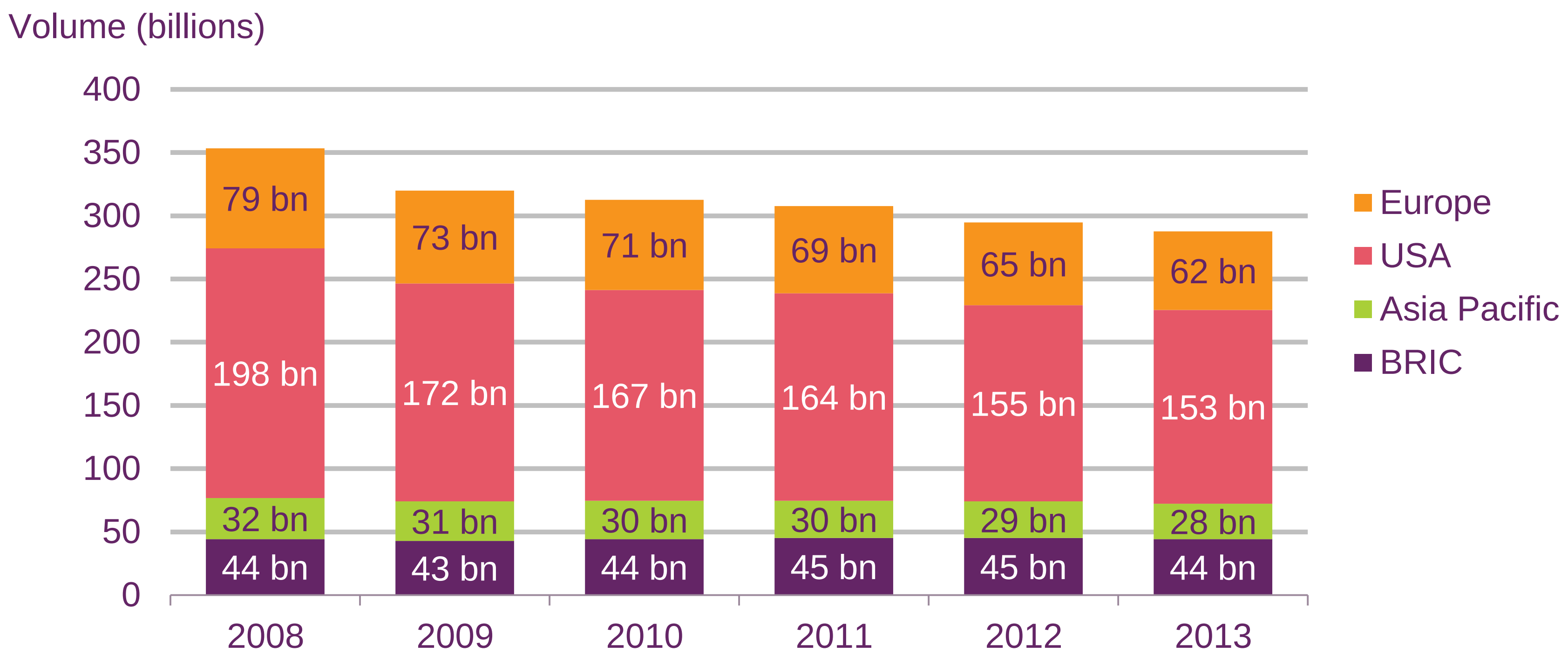
Figure 7.13

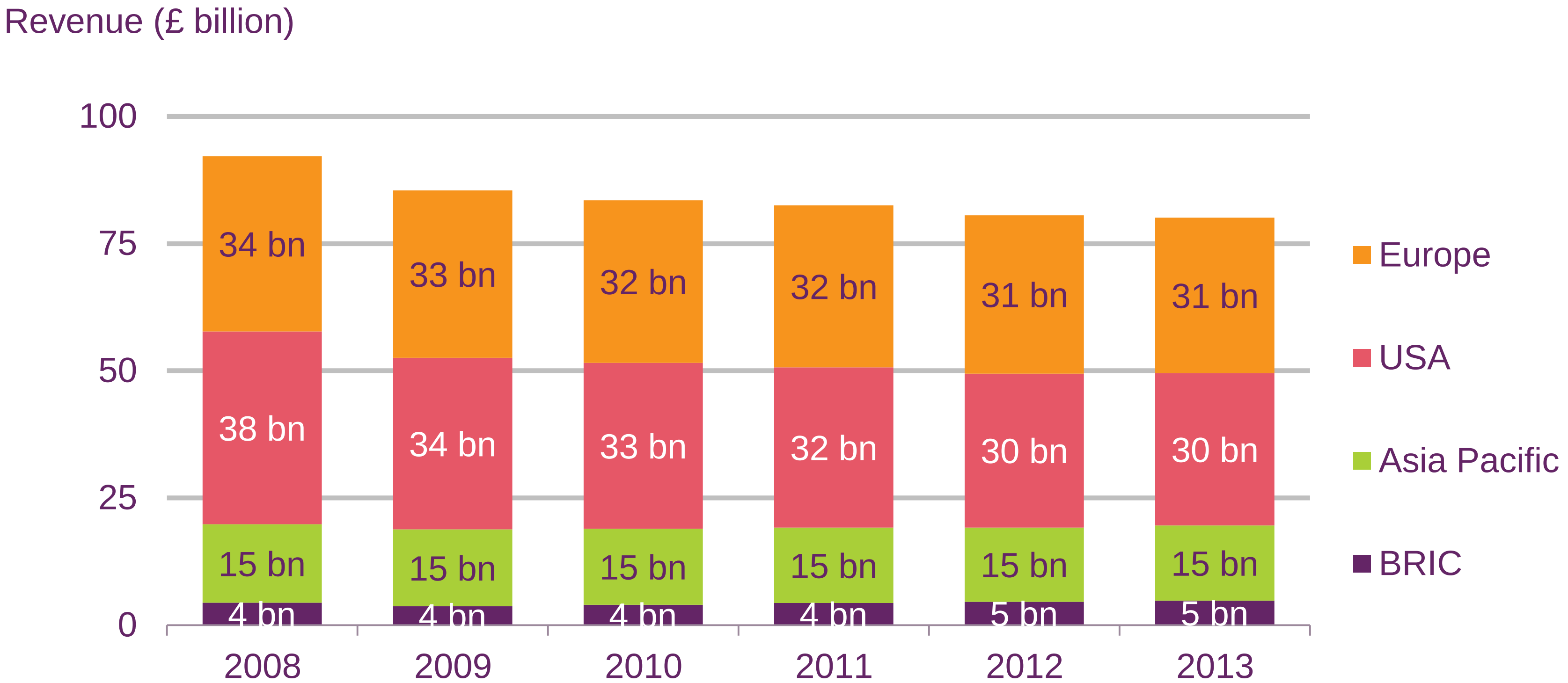
Total mail volumes in our comparator countries: 2008-2013



Source: WIK / Ofcom analysis

Figure 7.14

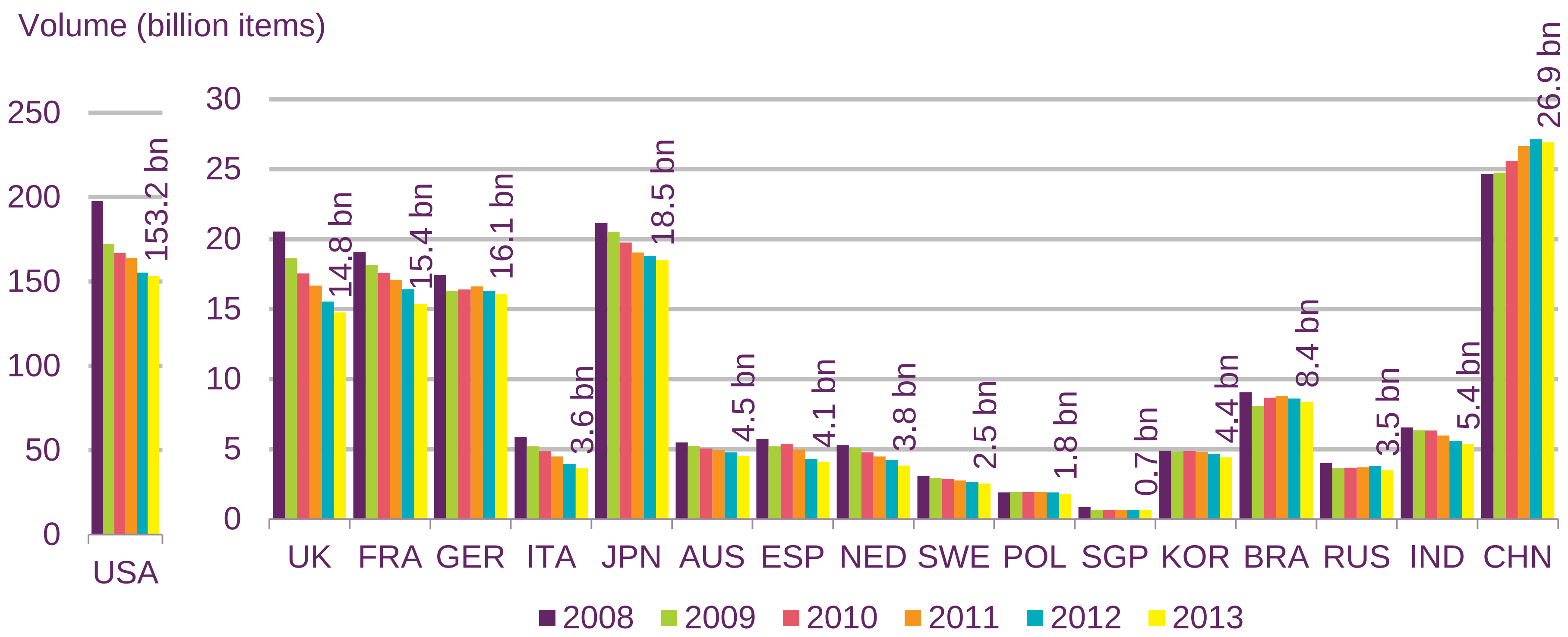
Total mail revenues in our comparator countries: 2008-2013



Source: WIK / Ofcom analysis
Values converted from the local currency unit to British Sterling (£1 = €1.177 / US$1.563 / JPY¥152.606 / AUS$1.619 / SEK10.183 / PLN4.941 / SGD$1.956/ KRW₩ 1711.543/ BRL3.371/ RUB49.789/ INR91.588 / CNY¥ 9.685/ NGN₦ 242.685

Figure 7.15

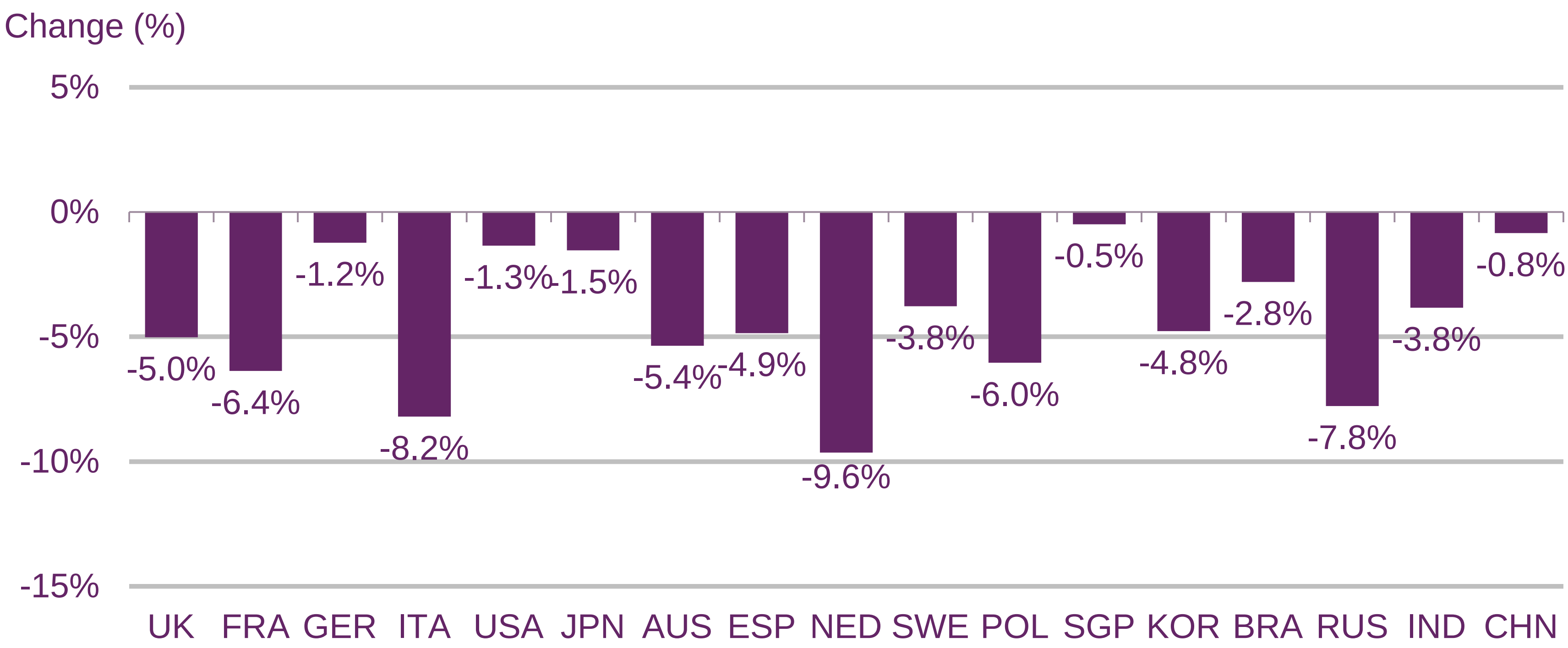
Mail volumes: 2008-2013



Source: WIK / Ofcom analysis

Figure 7.16

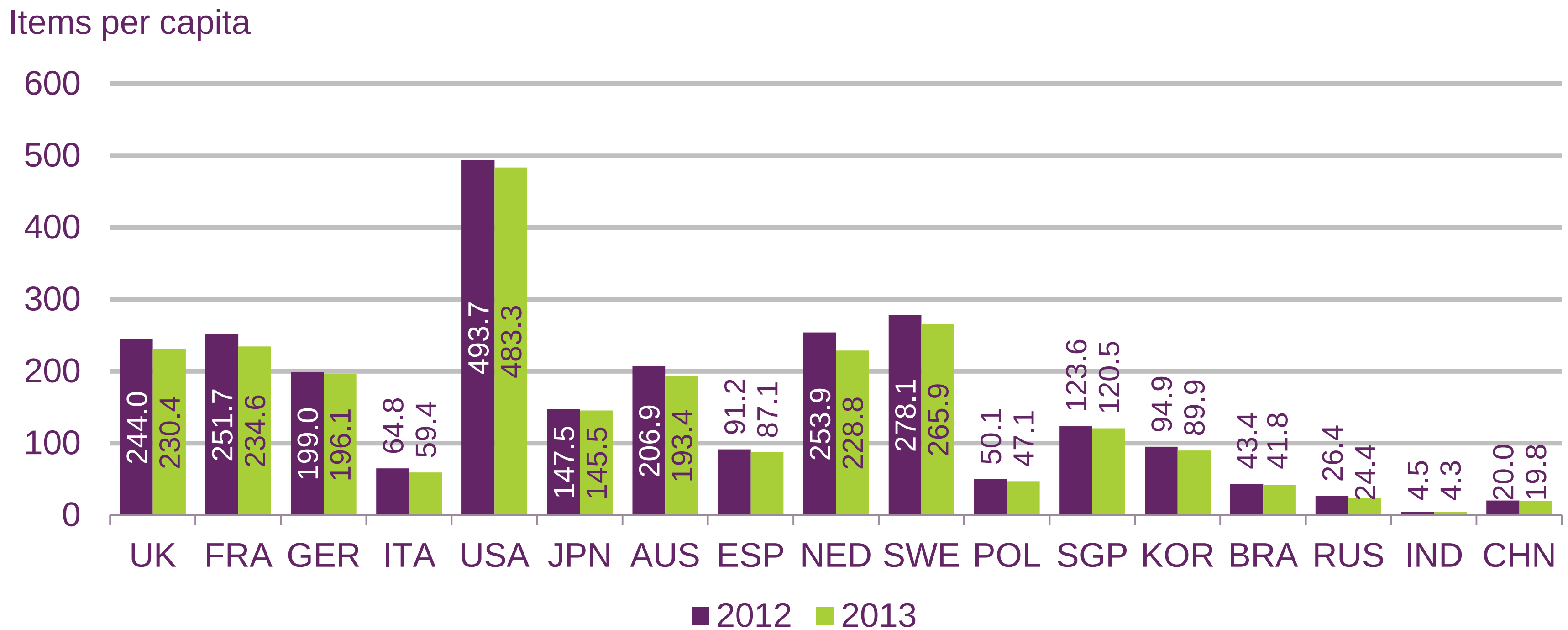
Proportional change in mail volume: 2012-2013



Source: WIK / Ofcom analysis

Figure 7.17

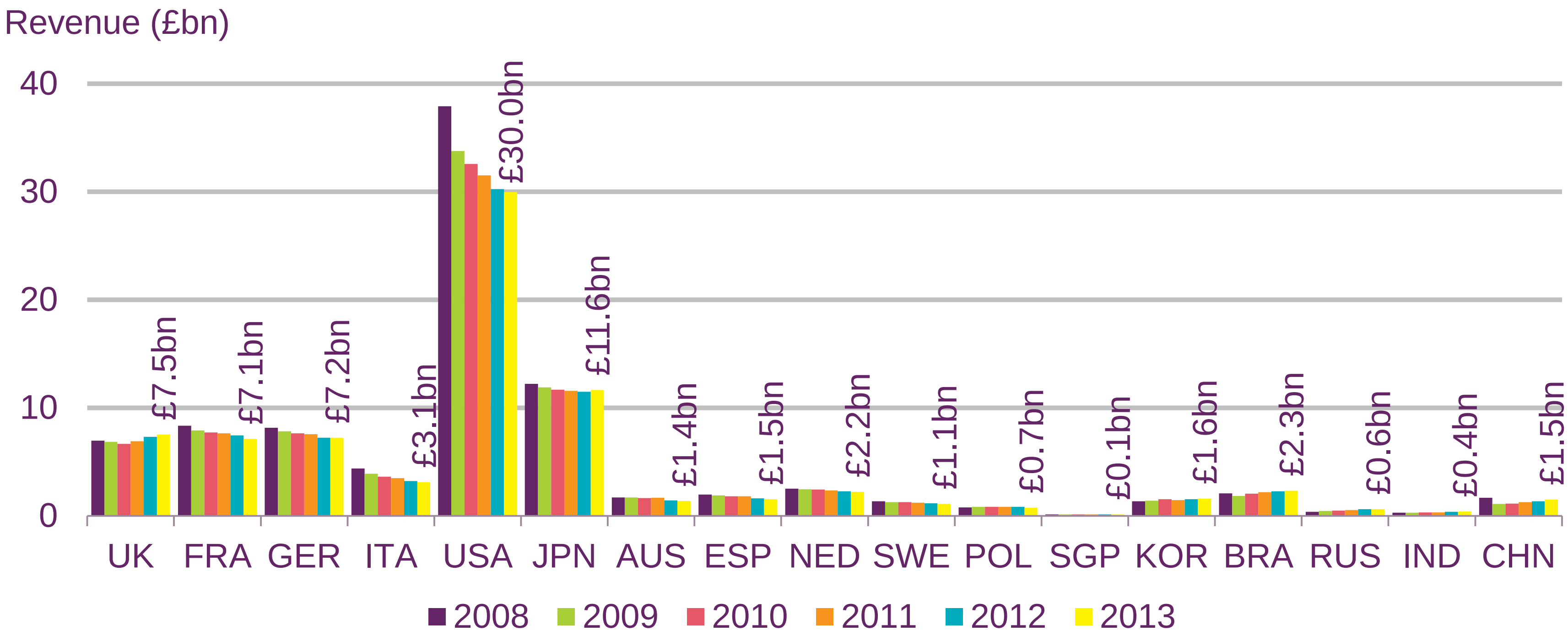
Volumes per head of population



Source: WIK / Ofcom analysis

Figure 7.18

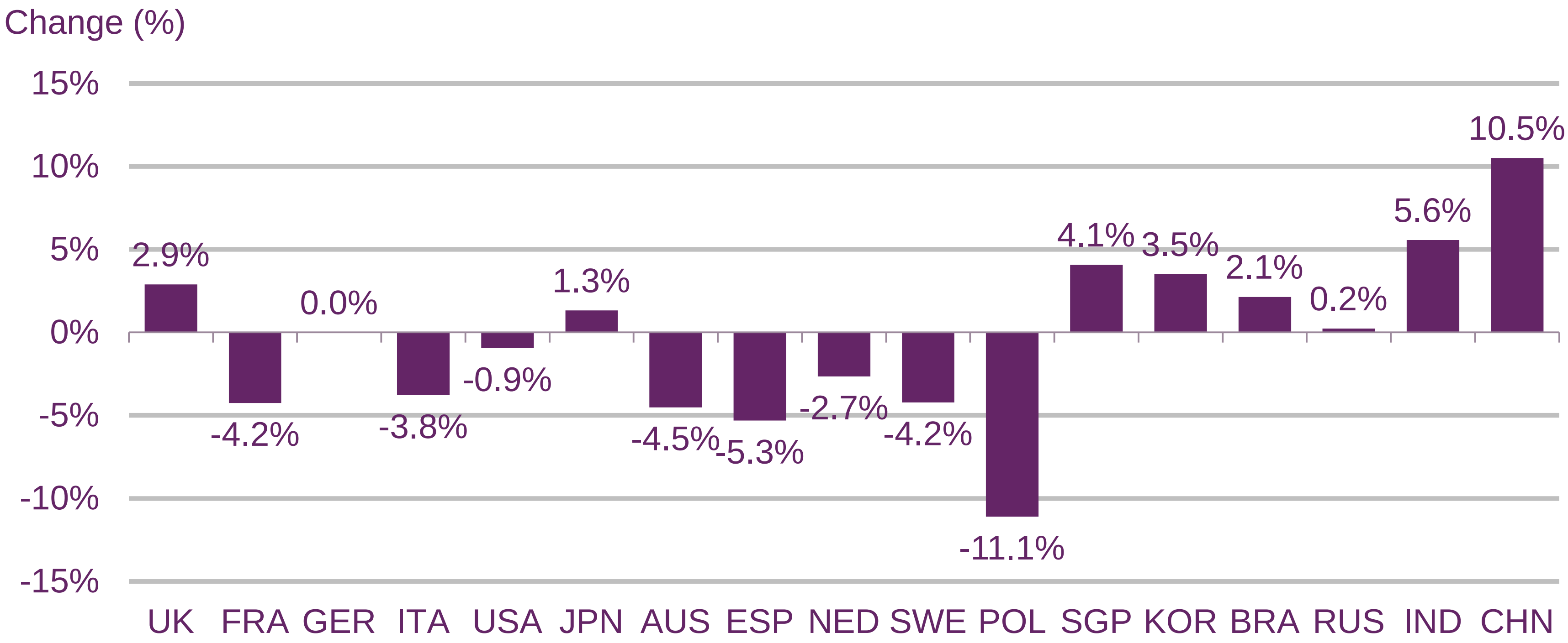
Revenue: 2008-2013



Source: WIK / Ofcom analysis
Values converted from the local currency unit to British Sterling (£1 = €1.177 / US$1.563 / JPY¥152.606 / AUS$1.619 / SEK10.183 / PLN4.941 / SGD$1.956/ KRW₩ 1711.543/ BRL3.371/ RUB49.789/ INR91.588 / CNY¥ 9.685/ NGN₦ 242.685

Figure 7.19

Proportional change in mail revenue: 2012-2013



Source: WIK / Ofcom analysis

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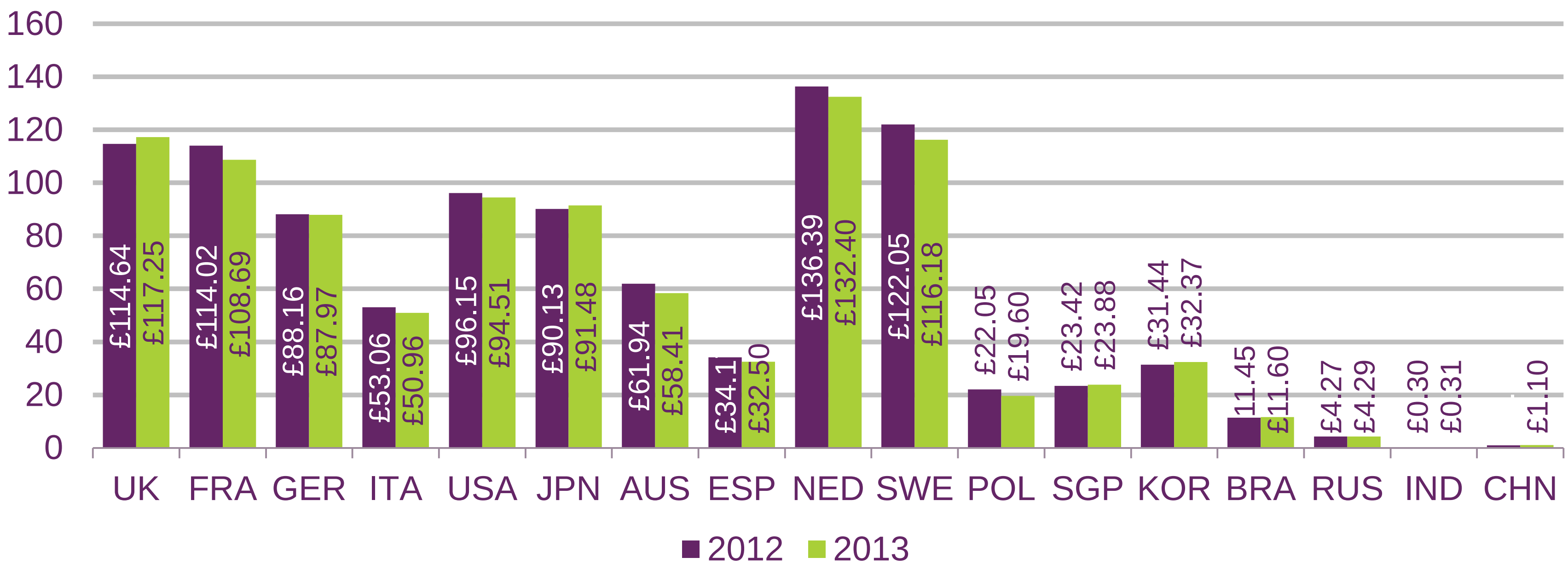
Figure 7.20

Revenues per head of population

Revenue per capita (£)



Source: WIK / Ofcom analysis

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Figure 7.21

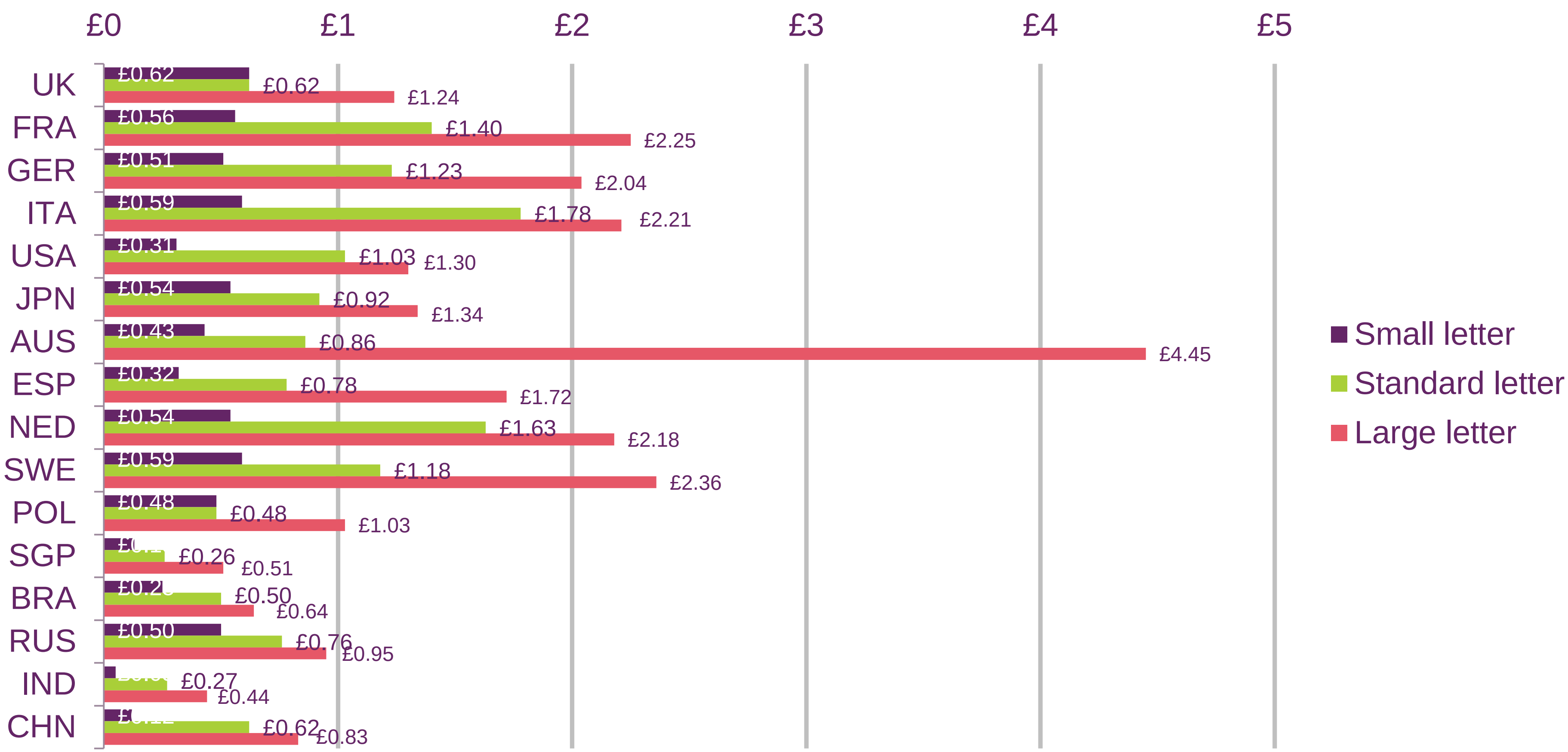
Delivery specifications for the fastest letter mail product

UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGA	BRA	RUS	IND	CHN
D+1	D+1	D+1	D+1	D+3	Variable	Variable	D+3	D+1	D+1	D+1	D+1	D+2-5	Variable	Variable	Variable

Source: WIK
Note: Delivery targets in Japan, Australia, Brazil, Russia, India and China are dependent on the point of origin and destination.

Figure 7.22

Published stamp prices for small (DL), standard (C5) and large (C5) domestic letters: August 2014

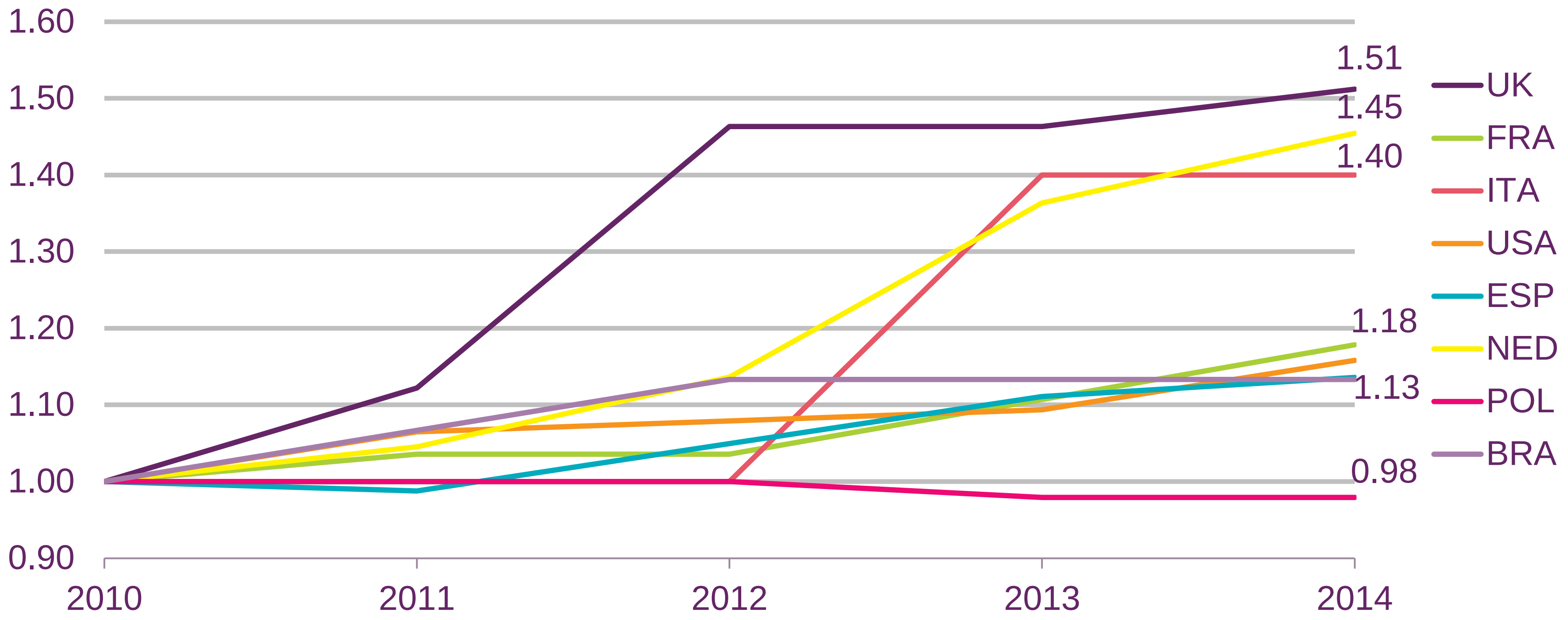


Source: WIK / Ofcom analysis

Figure 7.23

Increase in stamp price for the fastest available standard sized (C5) letter since 2010

(2010=1)



Source: WIK / Ofcom analysis.
Note: Figures are nominal.
Note: Standard letter is based on C5 envelope, 229x162x5 <=100g

Figure 7.24

Delivery specifications for the Second Class equivalent letter product

UK	FRA	SWE	POL	KOR	RUS
D+3	D+3-4	D+3	D+3	D+3	Variable

Source: WIK
Note: Delivery targets in Russia are dependent on the point of origin and destination.

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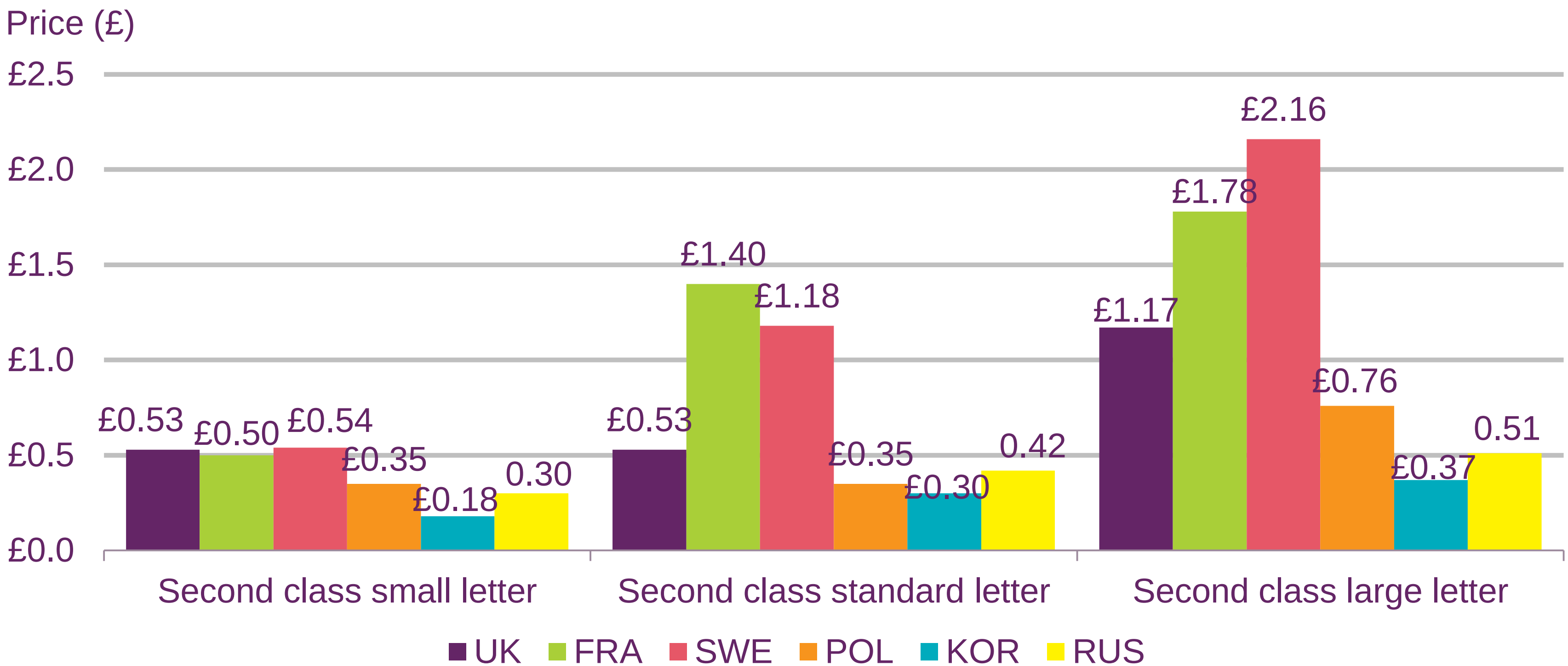
Figure 7.25

Stamp prices for Second Class domestic letters



Source: WIK / Ofcom analysis

Note: Small letter is based on DL envelope, 110x220x5 <=20g; Standard letter is based on C5 envelope, 229x162x5 <=100g; Large letter is based on C4 envelope, 324*224*25 101g-150g

Values converted from the local currency unit to British Sterling (£1 = €1.177 / US$1.563 / JPY¥152.606 / AUS$1.619 / SEK10.183 / PLN4.941 / SGD$1.956/ KRW₩ 1711.543/ BRL3.371/ RUB49.789/ INR91.588 / CNY¥ 9.685/ NGN₦ 242.685

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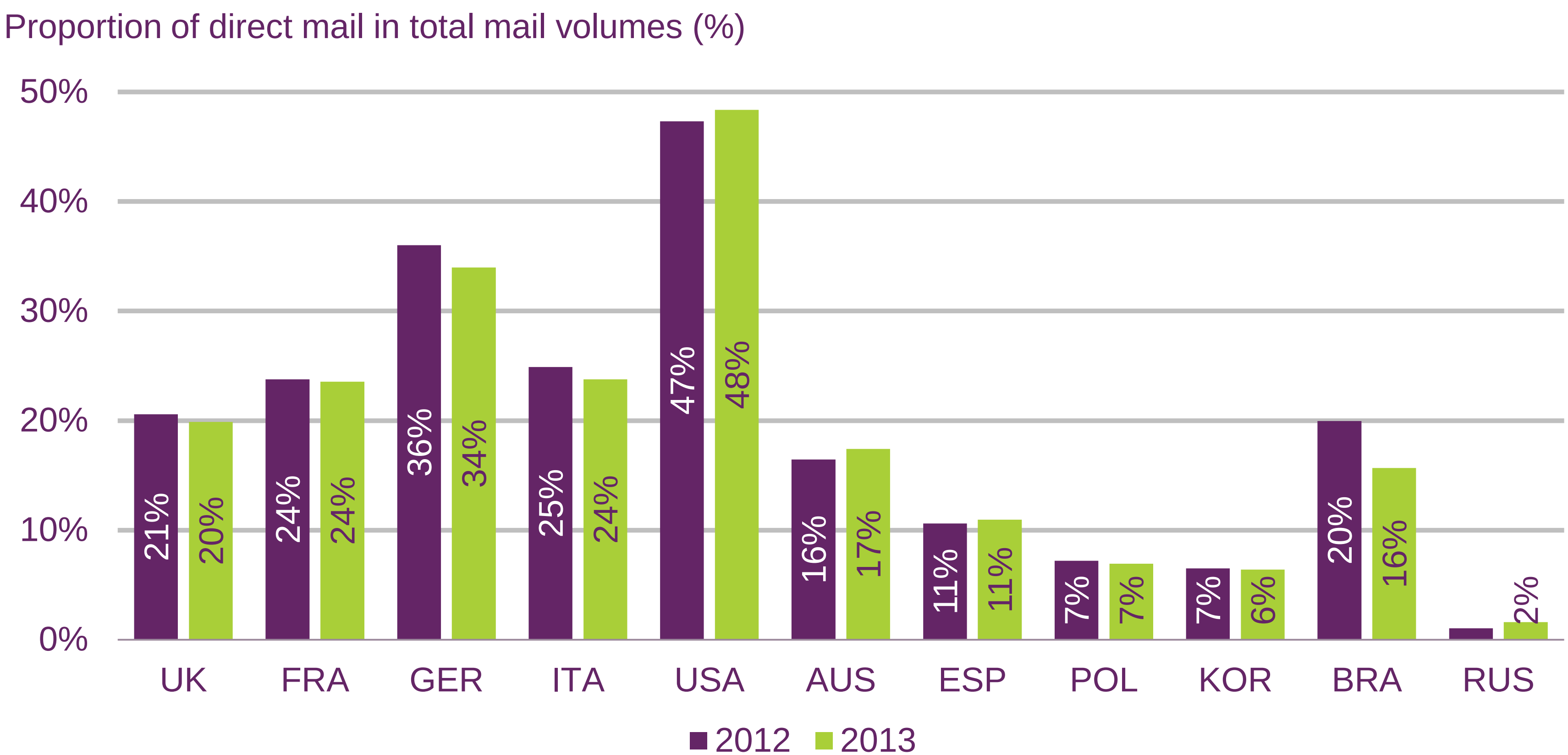
Figure 7.26

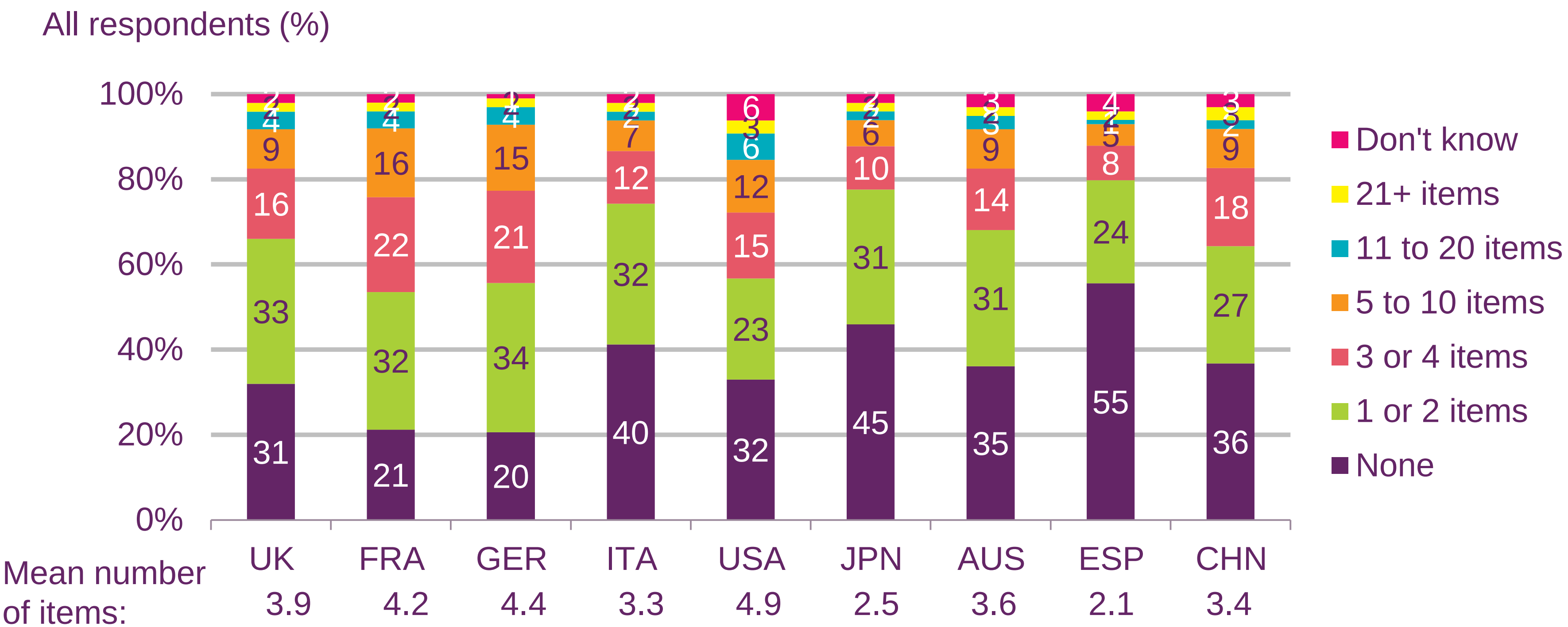
Proportion of direct mail in total mail: 2013



Source: WIK / Ofcom analysis

Figure 7.27

Approximate number of items of post sent per month



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.12 Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

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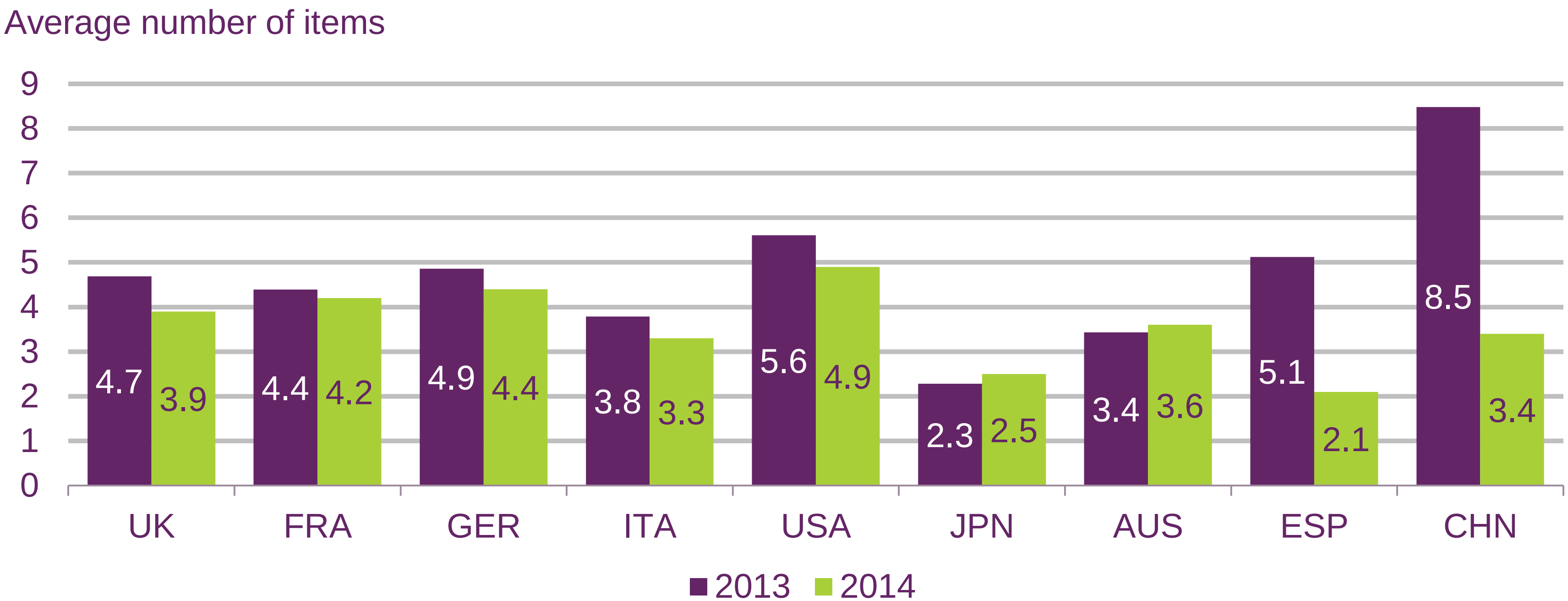
Figure 7.28

Average number of items of post sent per month

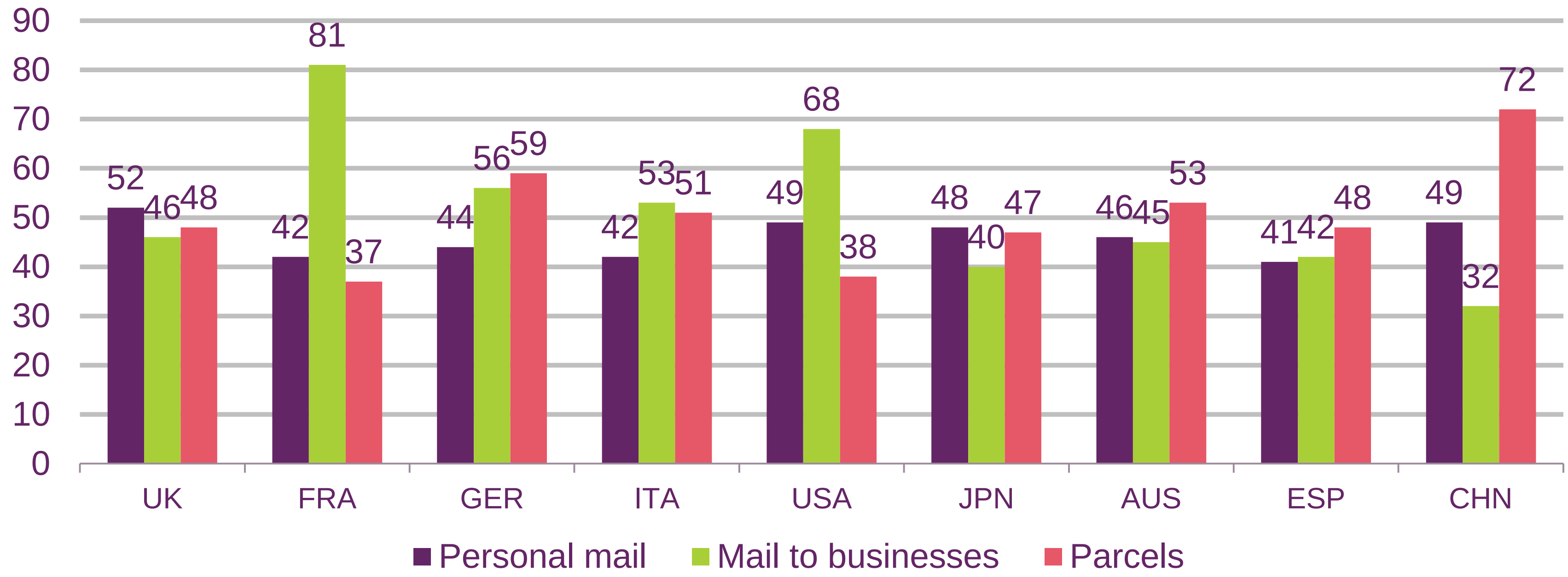


Source: Ofcom consumer research October 2014, September 2013, September 2012
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q.12 Approximately how many items of post - including letters, cards and parcels - have you personally sent in the last month?

Figure 7.29

Categories of post sent in the past month: personal mail, mail to businesses, and parcels

Proportion of respondents (%)



Source: Ofcom consumer research October 2014

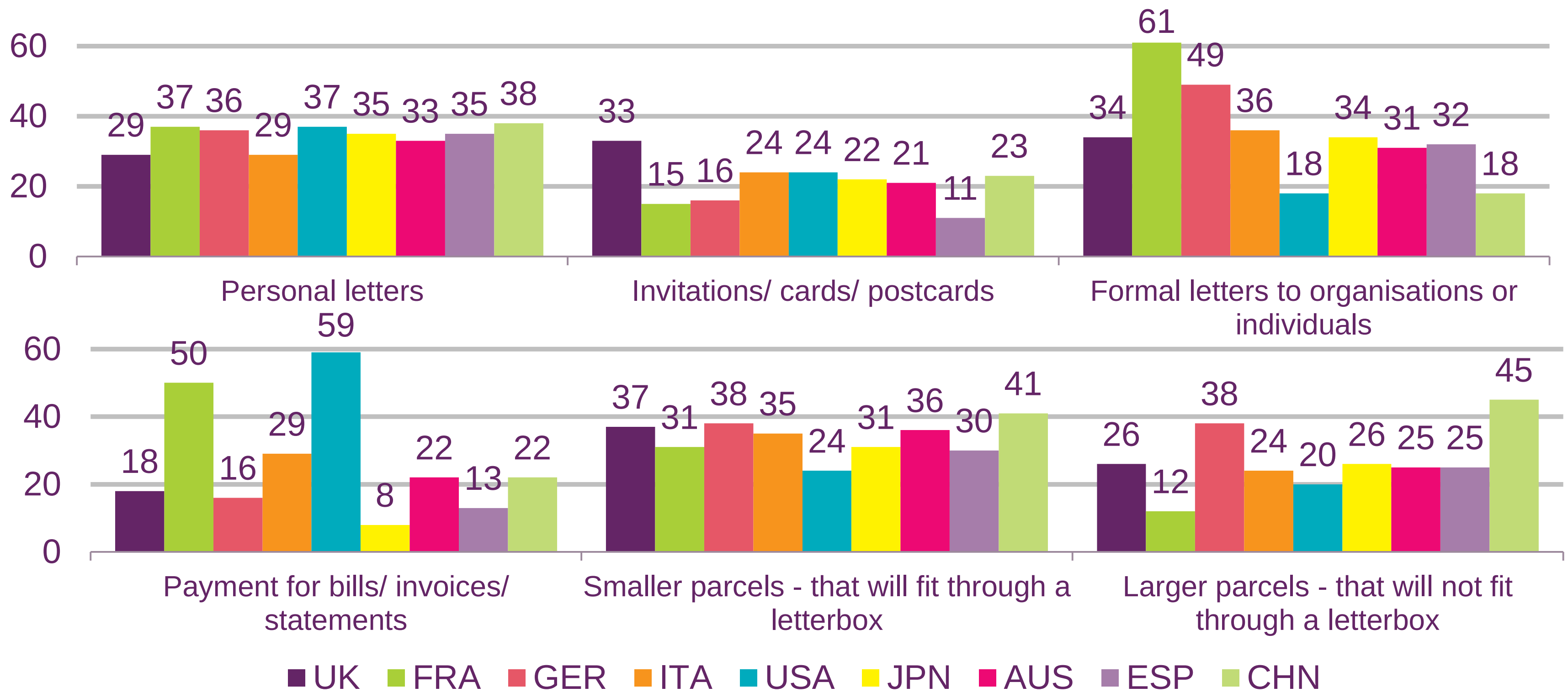
Base: All respondents who have sent any items of post in the last month, UK=684, FRA=795, GER=785, ITA=577, USA=618, JPN=527, AUS=623, ESP=401, CHN=613

Q.13 Which of these types of mail would you say you have personally sent in the last month by post?

Figure 7.30

Type of items sent in the past month

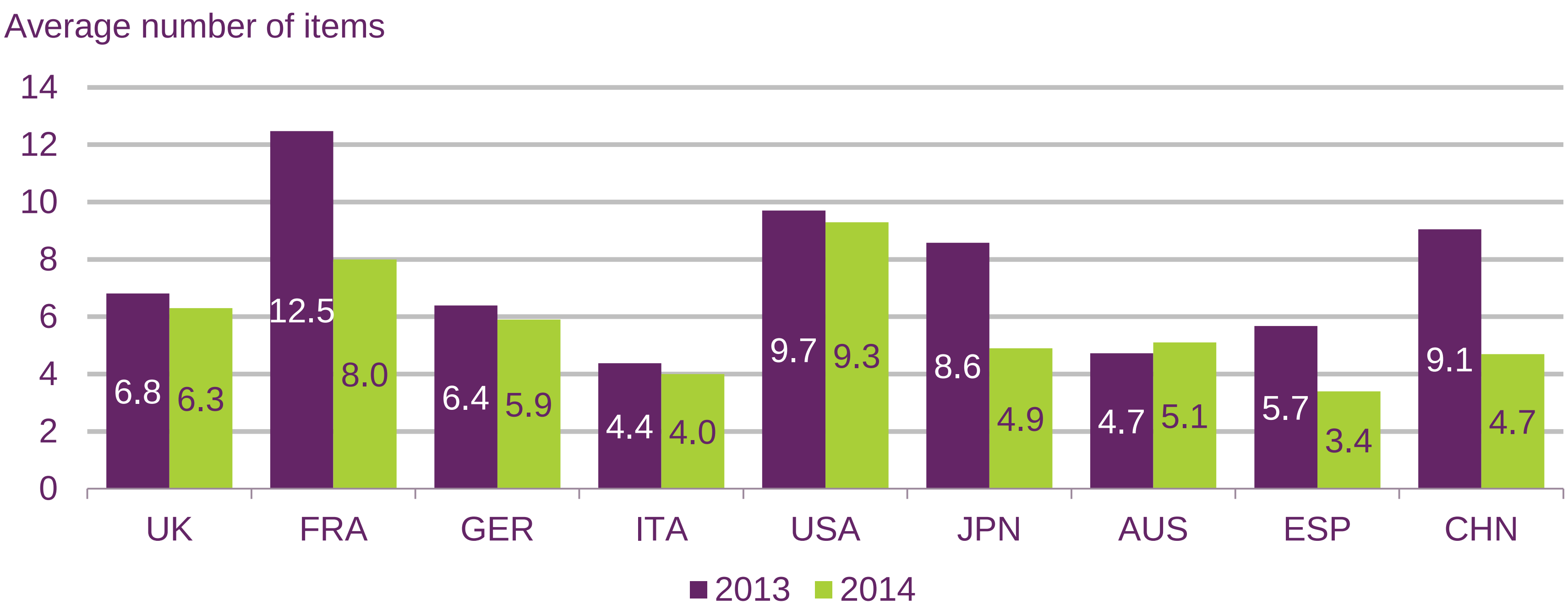
All respondents who have sent any items of post in the last month (%)



Source: Ofcom consumer research October 2014
Base: All respondents who have sent any items of post in the last month, UK=684, FRA=795, GER=785, ITA=577, USA=618, JPN=527, AUS=623, ESP=401, CHN=613
Q.13 Which of these types of mail would you say you have personally sent in the last month by post?

Figure 7.31

Number of items received in the past week

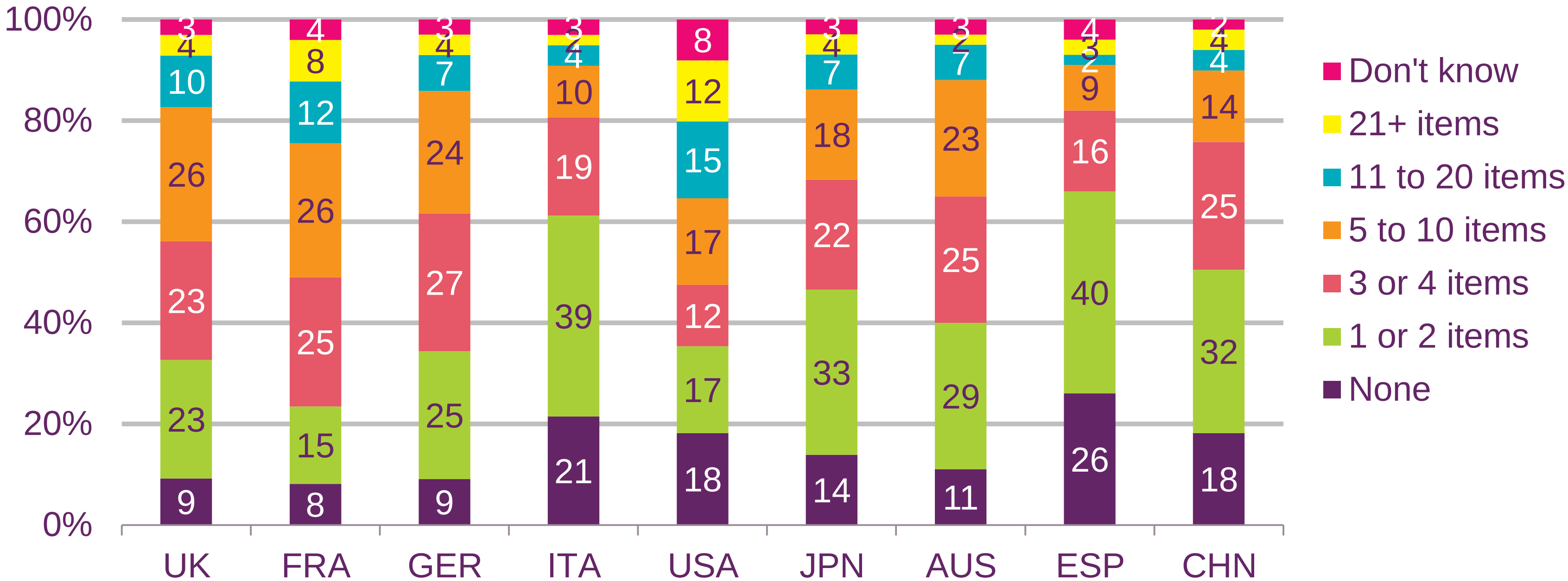


Source: Ofcom consumer research October 2014, September 2013
Base: All respondents, UK=1011, FRA=1027, GER=1006, ITA=1006, USA=1000, JPN=1003, AUS=1000, ESP=1002, CHN=1010
Q.14 Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week

Figure 7.32

Approximate number of items of post received in the past week

All respondents (%)



Mean number of items: 6.3 8.0 5.9 4.0 9.3 4.9 5.1 3.4 4.7

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.14 Approximately how many items of post - including letters, cards and parcels - have you personally received in the last week?

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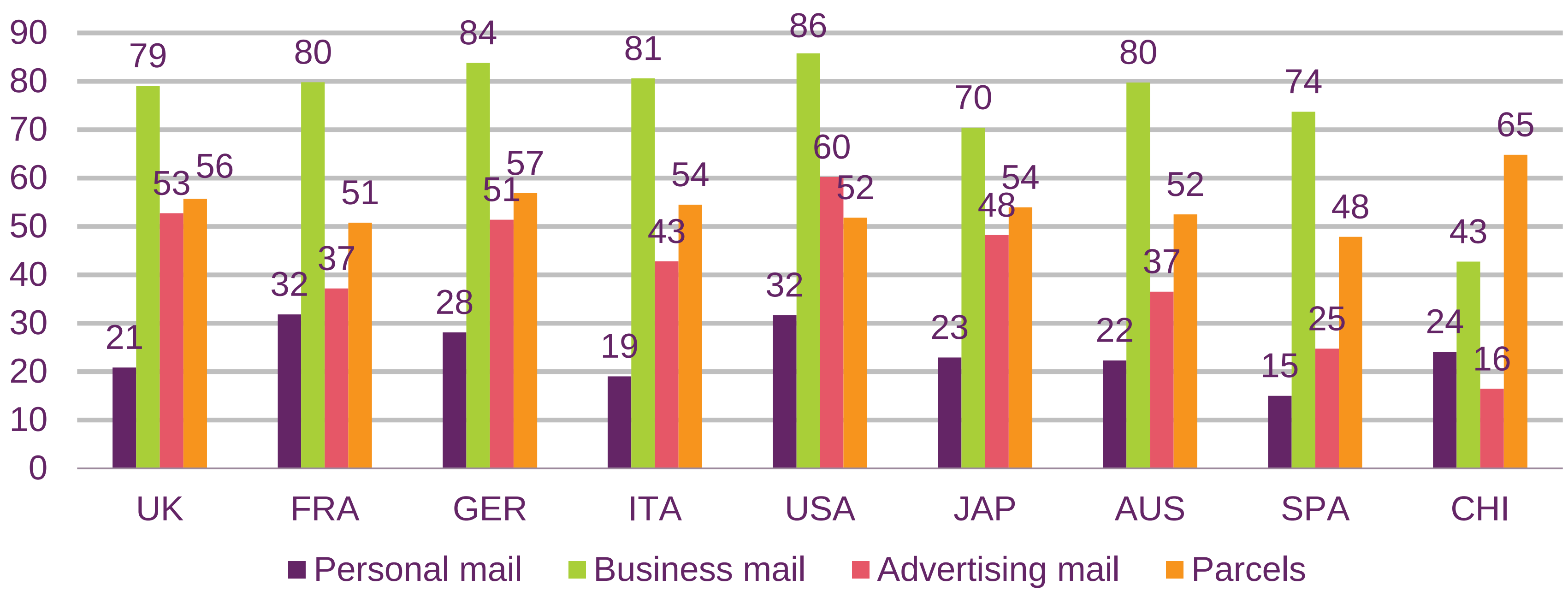
Figure 7.33

Categories of items received in the past week

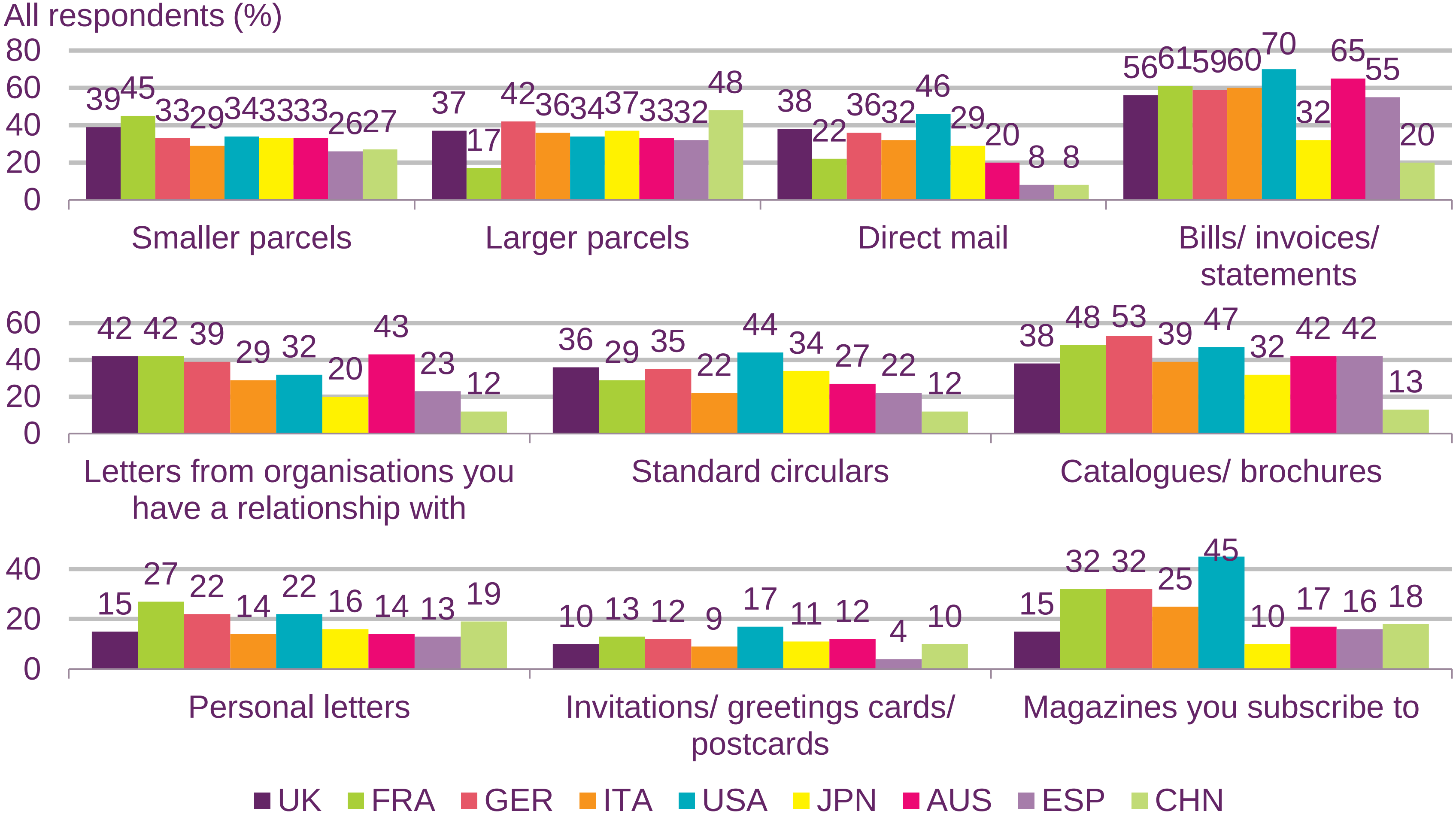
All who received any post in the last week (%)



Source: Ofcom consumer research September 2014
Base: All respondents who received at least one item of post in the last week, UK=888, FRA=896, GER=883, ITA=767, USA=739, JPN=838, AUS=865, ESP=700, CHN=810
Q16 Which of these types of items would you say you have personally RECEIVED through the post in the last WEEK? Please think about items that are addressed to you personally rather than items like leaflets or anything else that may come through your letterbox.

Figure 7.34

Types of mail received in the past week



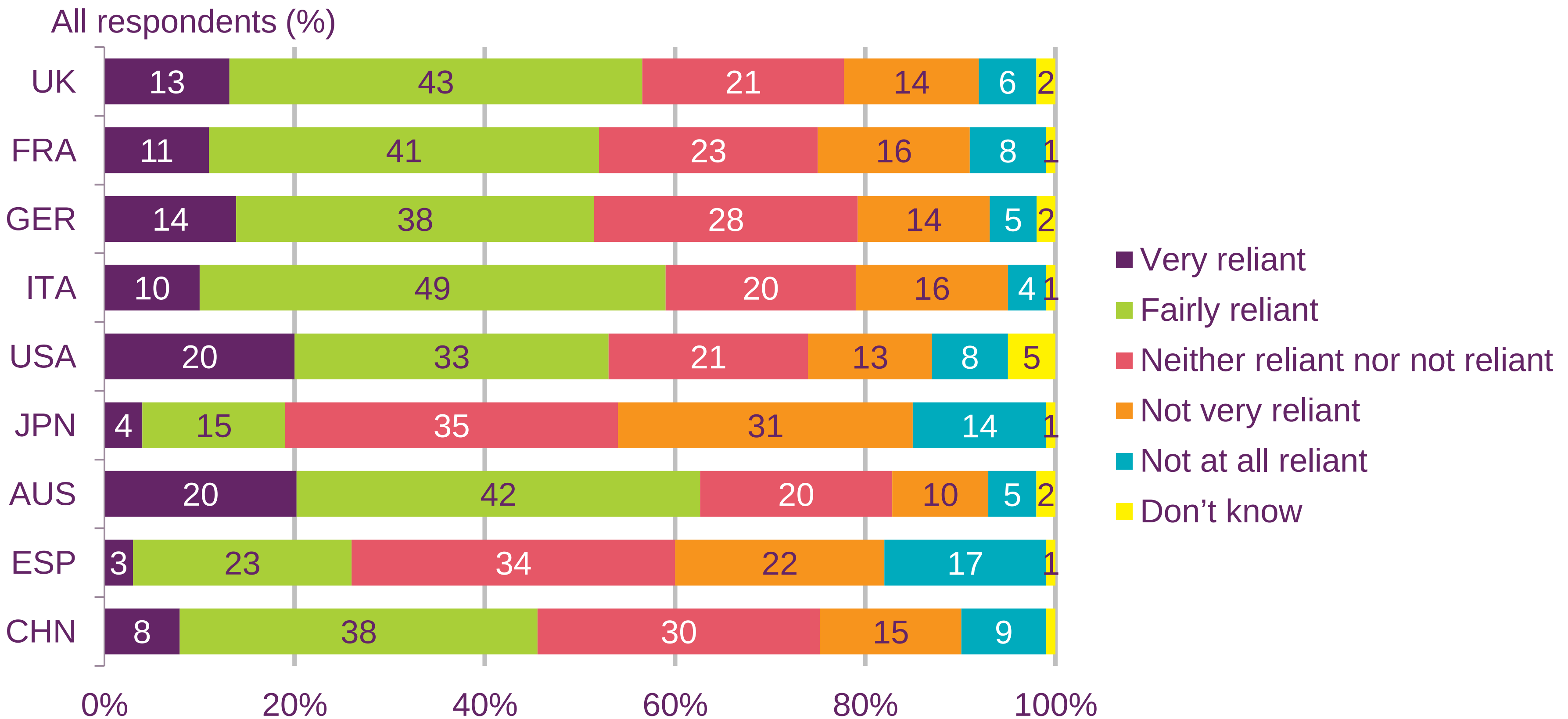
Source: Ofcom consumer research October 2014

Base: All respondents, UK=888, FRA=896, GER=883, ITA=767, USA=739, JPN=838, AUS=865, ESP=700, CHN=810

Q.16 Which of these types of items would you say you have personally received through the post in the last month?

Figure 7.35

Reliance on post as a way of communicating



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.17 How reliant would you say you are on post as a way of communicating?