

Figure 1.1

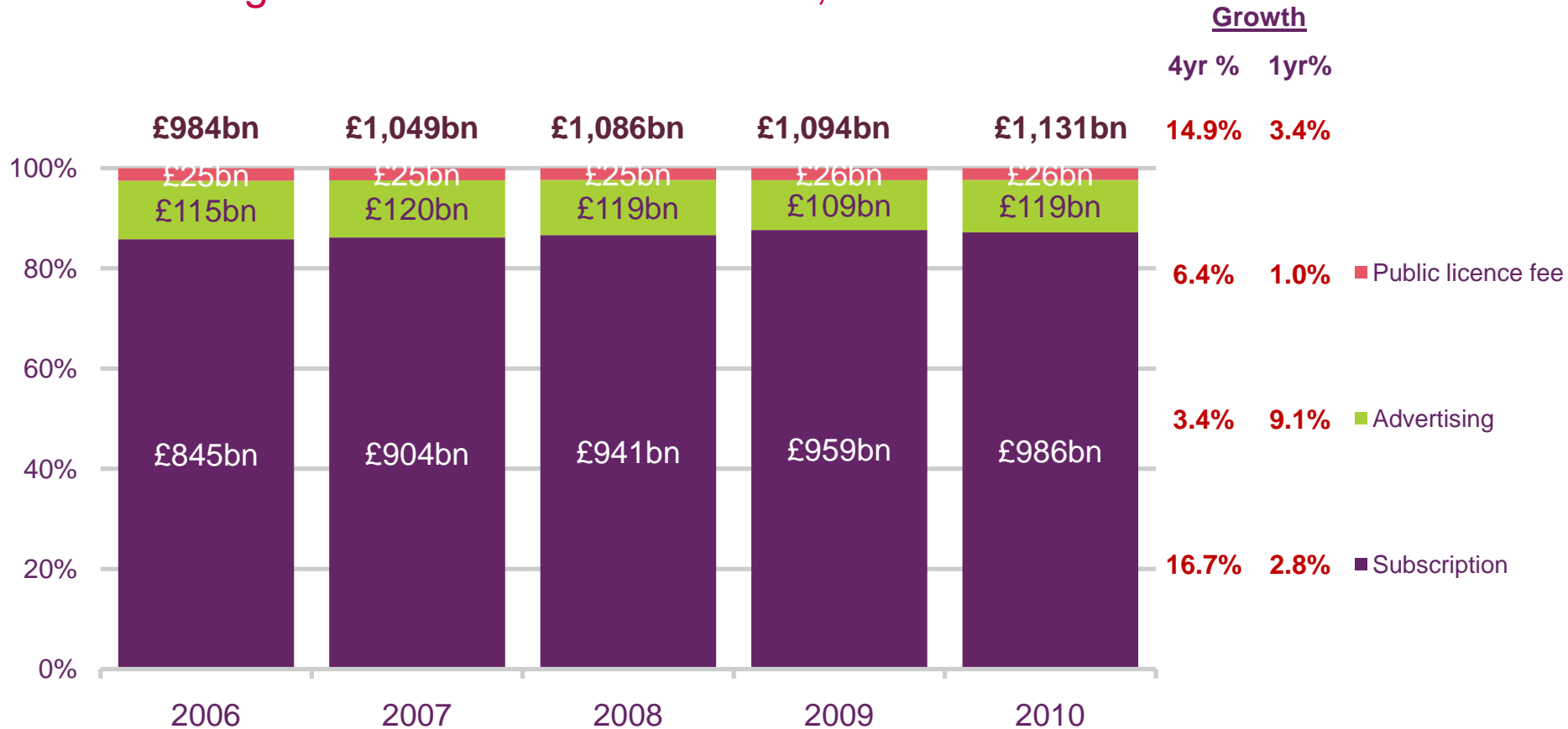
Global communications revenues



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook for television and radio. IDATE / industry data / Ofcom for US and UK TV revenues and all telecoms revenues. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010. Note: Net TV advertising revenues for Russia have been calculated by discounting 15% of TV advertising spending to remove agency fees and production costs.

Figure 1.2

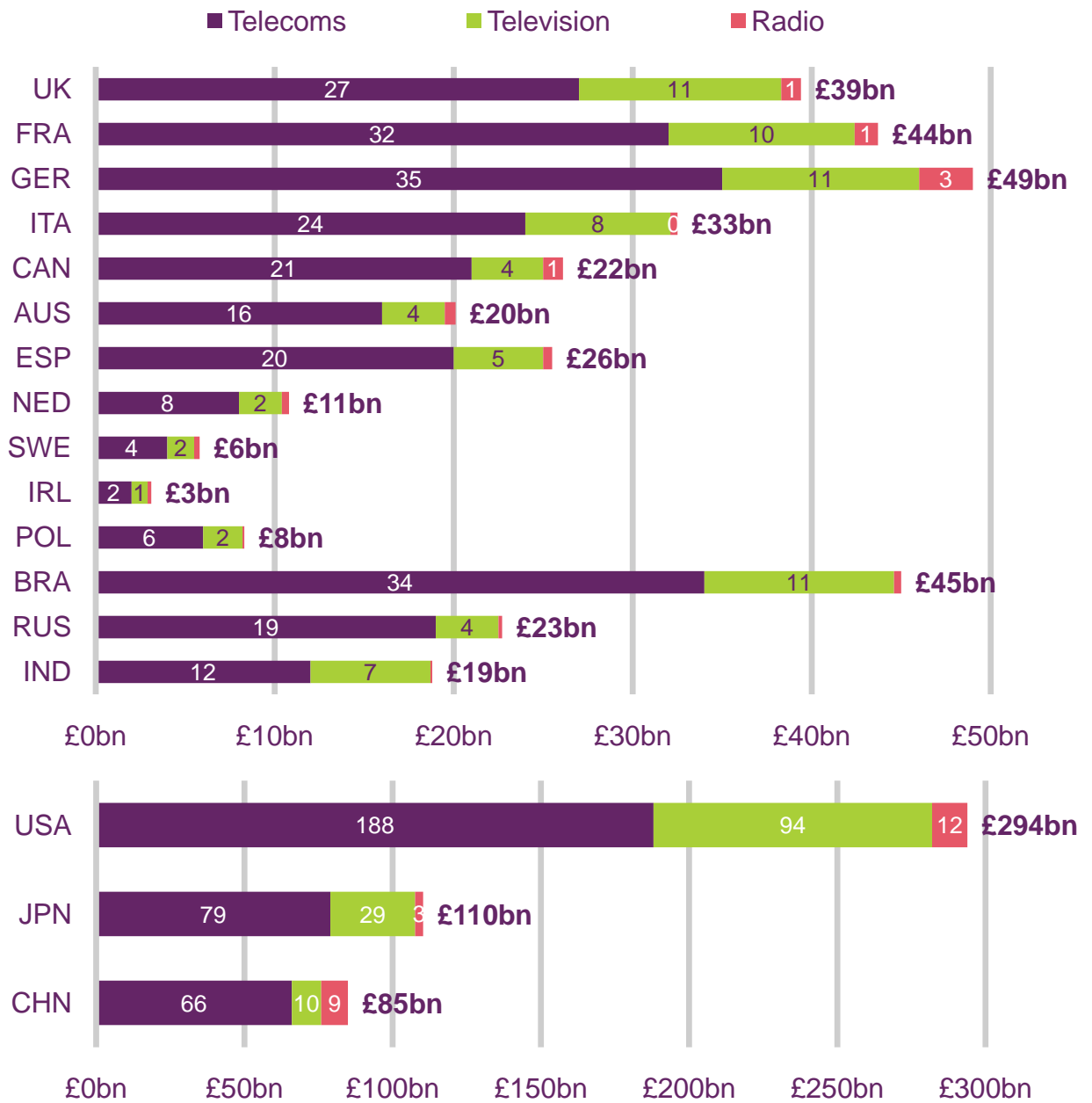
Source of global revenues for telecoms, radio and TV services



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook for television and radio. IDATE / industry data / Ofcom for US and UK TV revenues and all telecoms revenues. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010. Note: Net TV advertising revenues for Russia have been calculated by discounting 15% of TV advertising spending to remove agency fees and production costs. All telecoms revenues have been allocated as subscription revenues.

Figure 1.3

Communications sector revenues in 2010

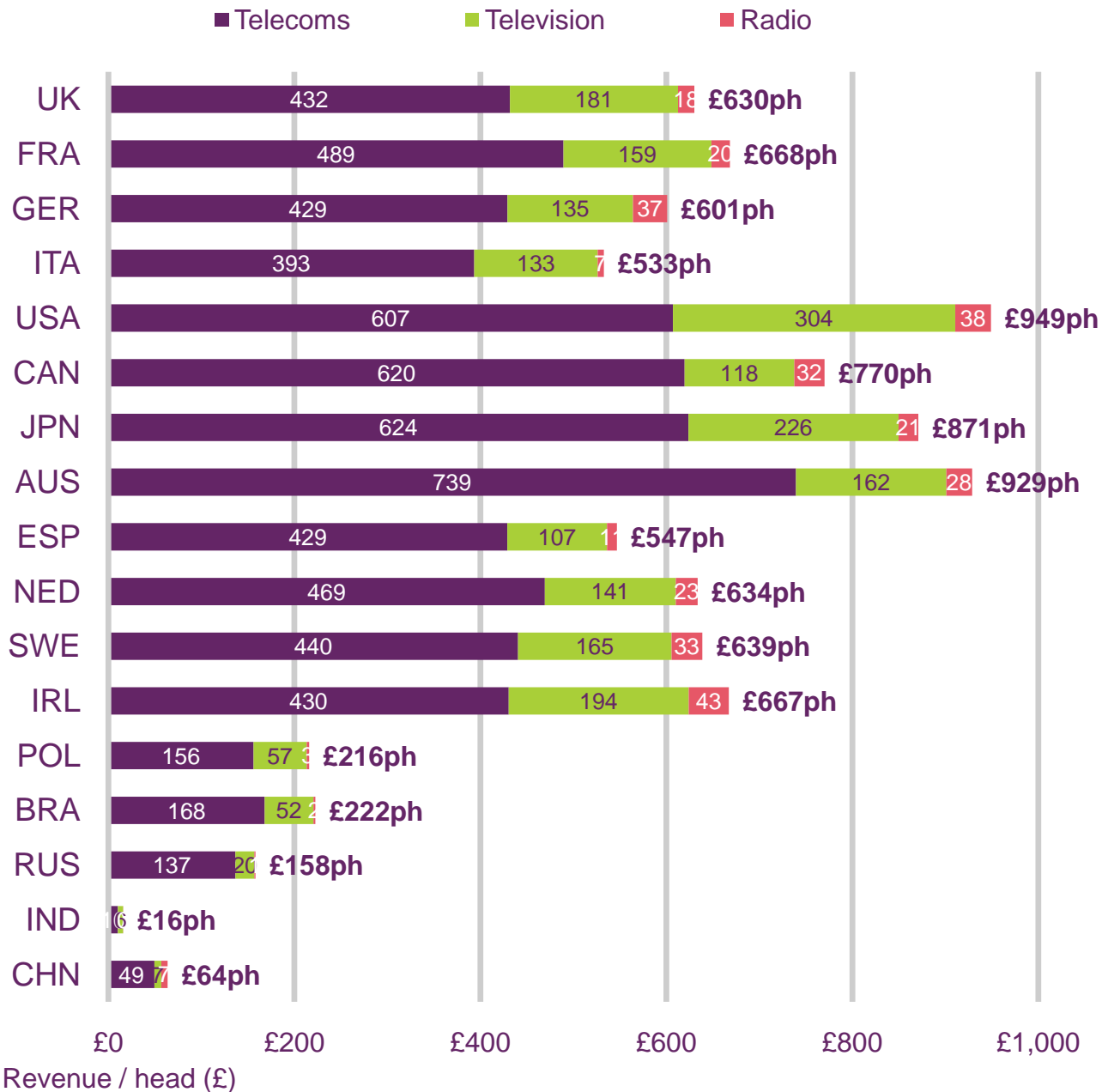


Revenue £bn

Source: Ofcom analysis based on Ofcom / IDATE data for telecommunications/TV and Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook for radio. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010. Notes: the UK radio industry figure is sourced from broadcaster returns made to Ofcom. Telecoms revenue excludes revenue from narrowband internet and corporate data services and broadband revenues for BRA, RUS, IND and CHN.

Figure 1.4

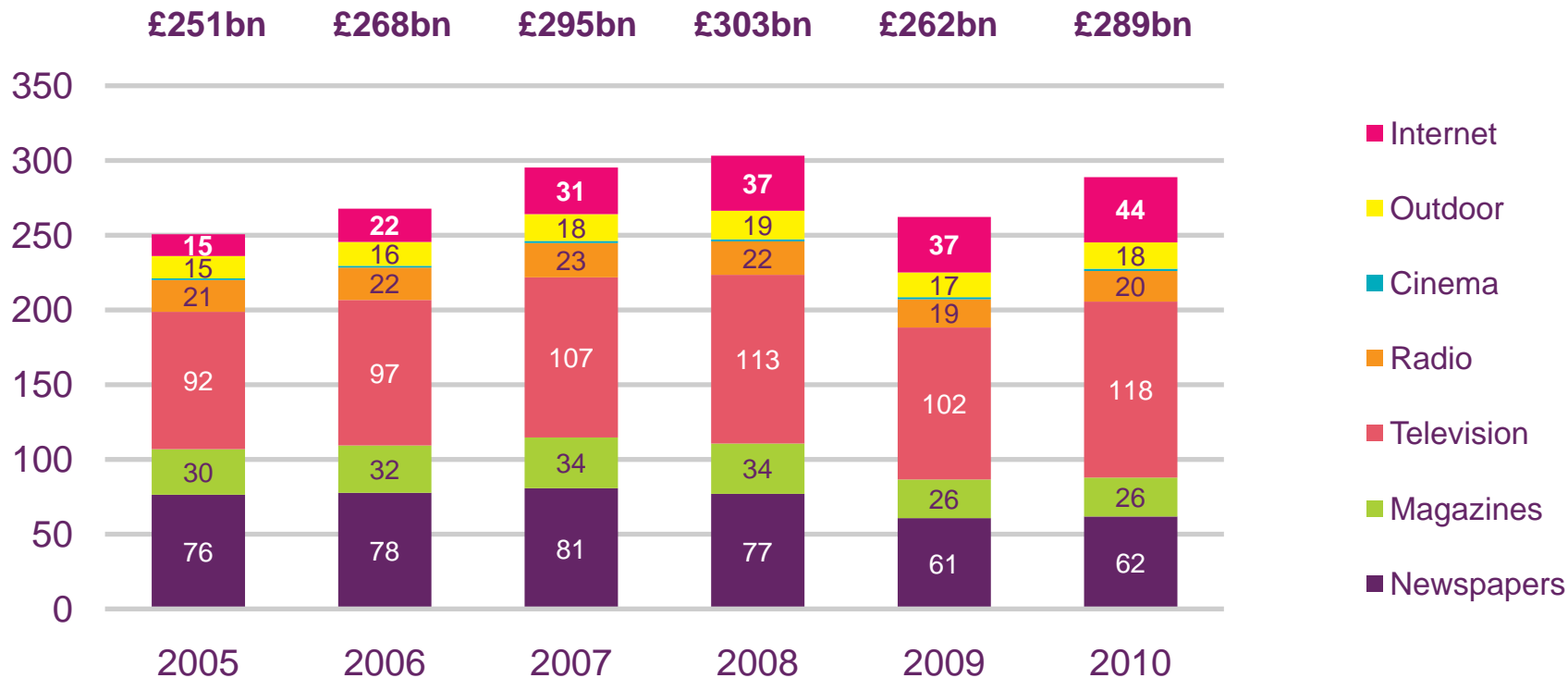
Communications sector revenue, per head: 2010



Source: Ofcom analysis based on Ofcom / IDATE data for telecommunications/TV and Ofcom analysis based on data taken from PriceWaterhouseCoopers Global Entertainment and Media Outlook 2011-2015 @ www.pwc.com/outlook for radio. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.546 to the GBP, representing the IMF average for 2010. Notes: the UK radio industry figure is sourced from broadcaster returns made to Ofcom. Telecoms revenue excludes revenue from narrowband internet and corporate data services and broadband revenues for BRA, RUS, IND and CHN

Figure 1.5

Global advertising revenue by source



Source: Warc Data (www.warc.com).

Figure 1.6

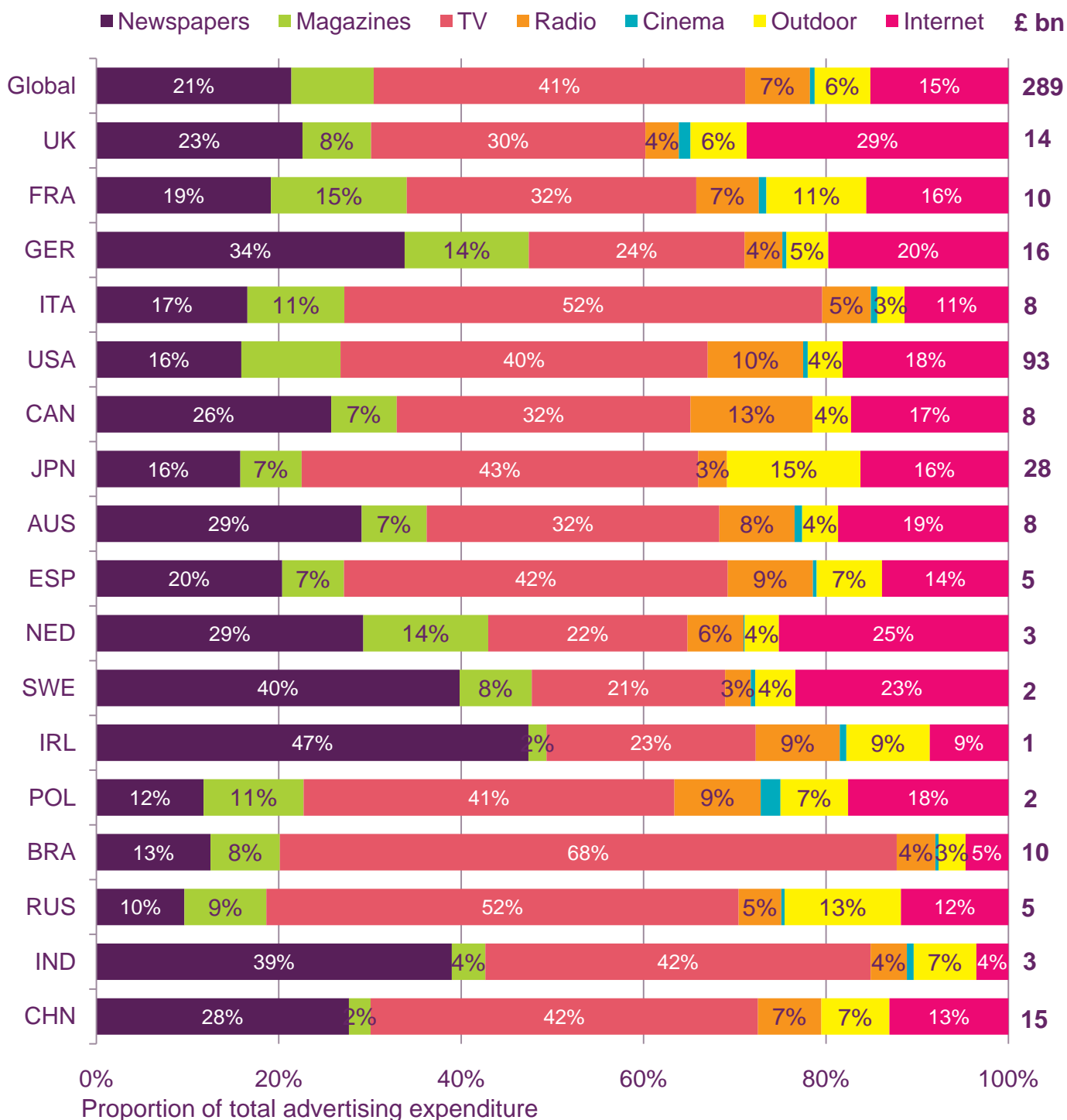
Global expenditure growth rates

	All	Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet
2009-2010 annual growth	10.2%	1.8%	1.0%	15.7%	8.2%	13.2%	6.2%	17.8%
2005-2010 CAGR	2.9%	-4.2%	-3.1%	5.1%	-0.7%	6.4%	3.4%	24.5%
2008-2010 CAGR	-1.0%	-4.3%	-5.0%	0.8%	-1.8%	1.4%	-1.5%	3.5%

Source: Warc Data (www.warc.com).

Figure 1.7

2010 advertising expenditure analysis



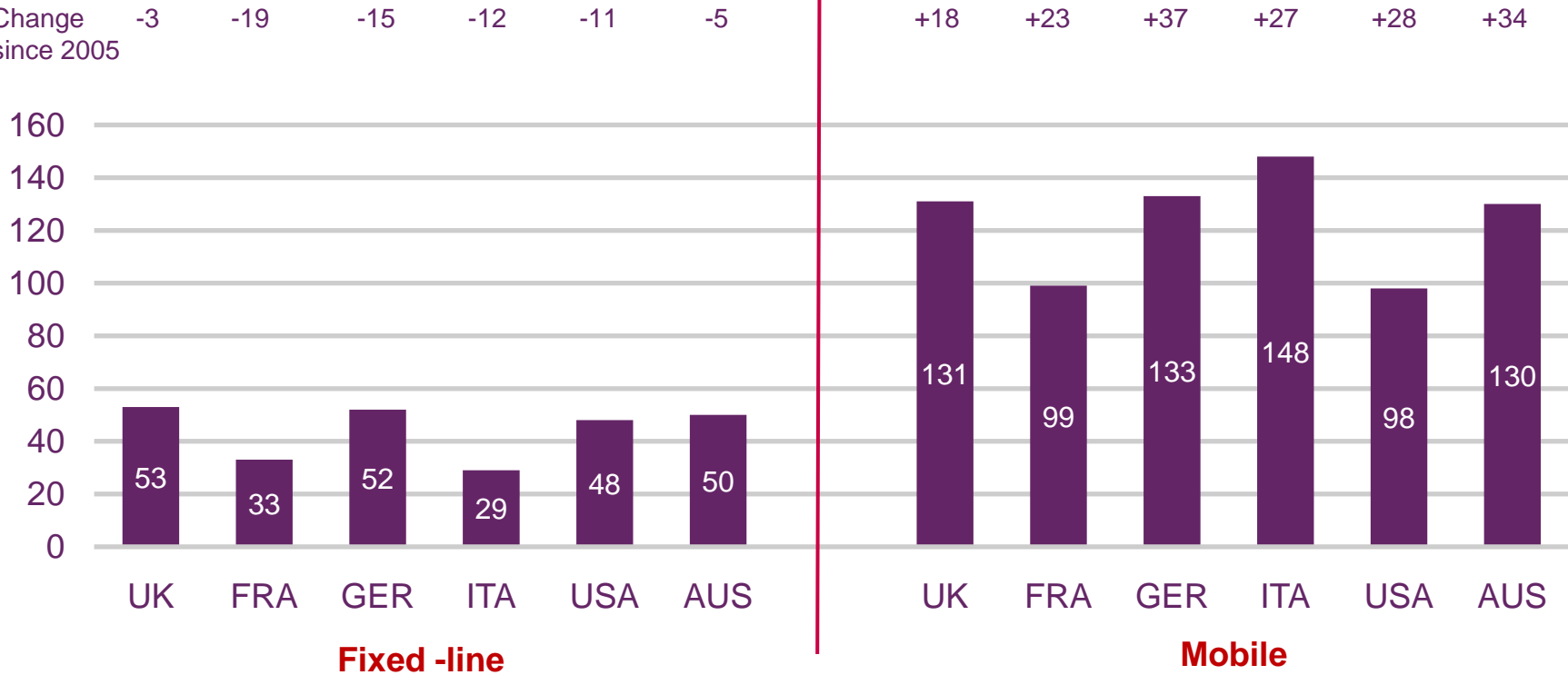
Source: Warc Data (www.warc.com). Note: Excludes expenditure on cinema advertising in CAN, JPN and CHN

Figure 1.8

Fixed-line voice and mobile connections per capita, 2010

Connections per 100 population

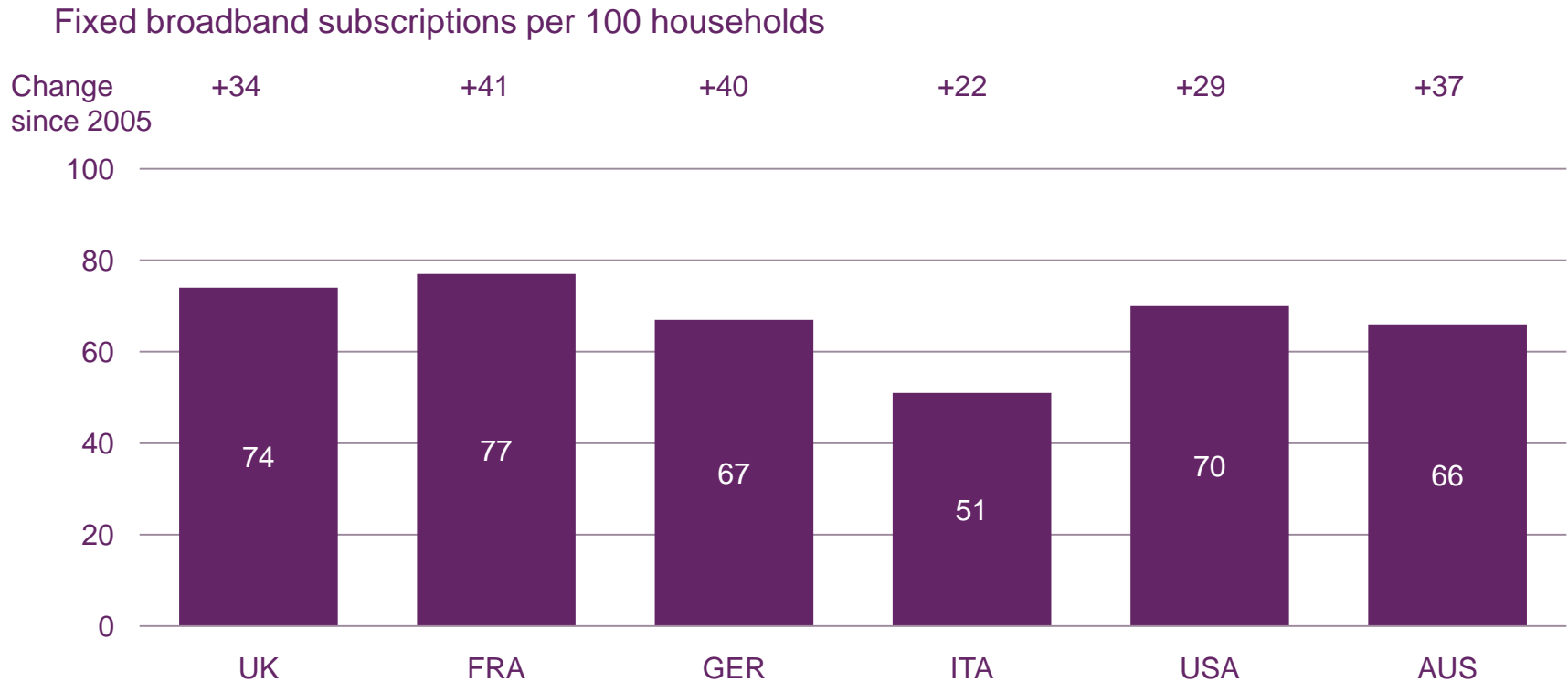
Change since 2005



Source: IDATE / industry data / Ofcom

Figure 1.9

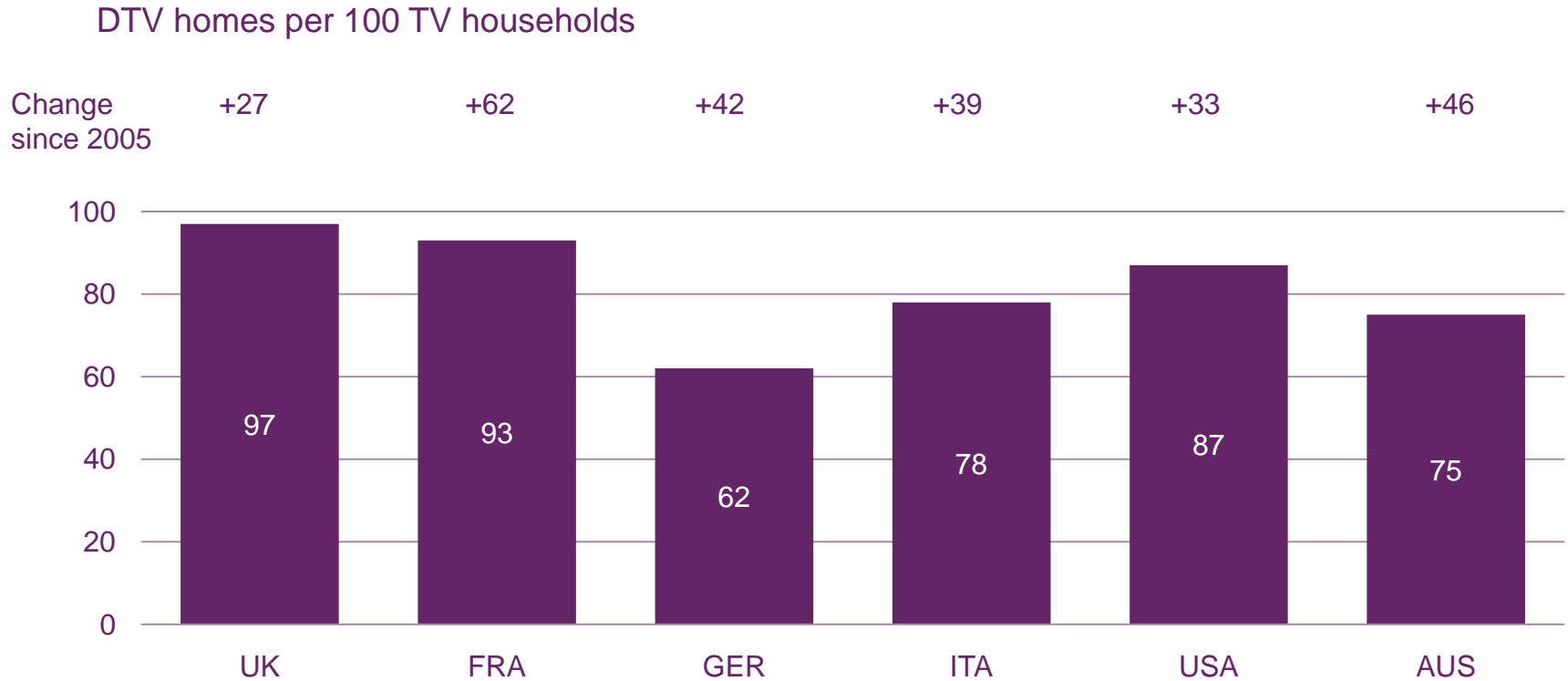
Fixed broadband penetration in 2010



Source: IDATE. Note: Broadband calculation includes business connections

Figure 1.10

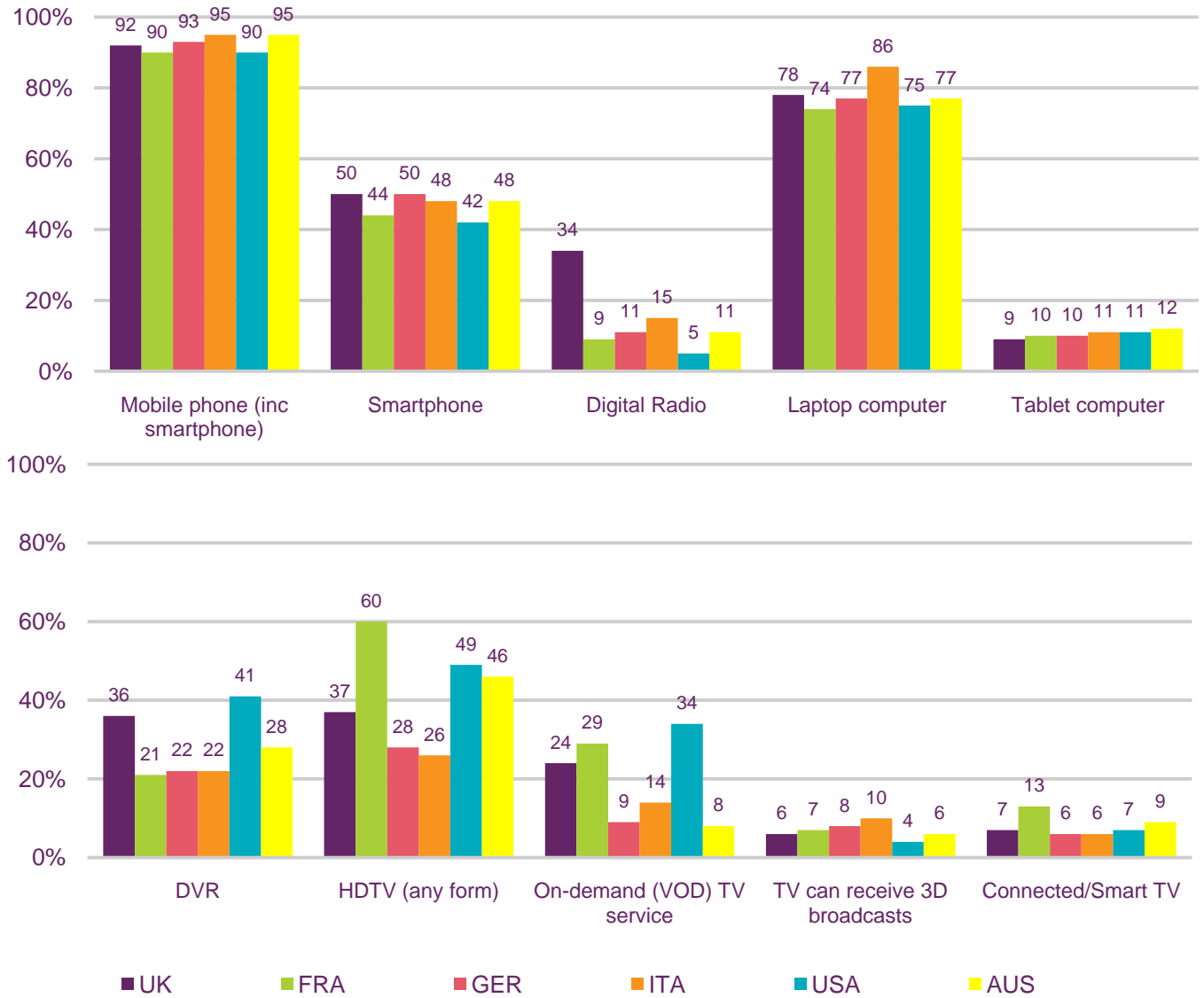
DTV penetration in 2010



Source: IDATE

Figure 1.11

Ownership and use of devices



Source: Ofcom consumer research, October 2011. Base sizes: UK=1015, France=1014, Germany=1014, Italy=1045, USA=1002, Australia = 1012. Q: Which of the following devices do you own and personally use?

Figure 1.12

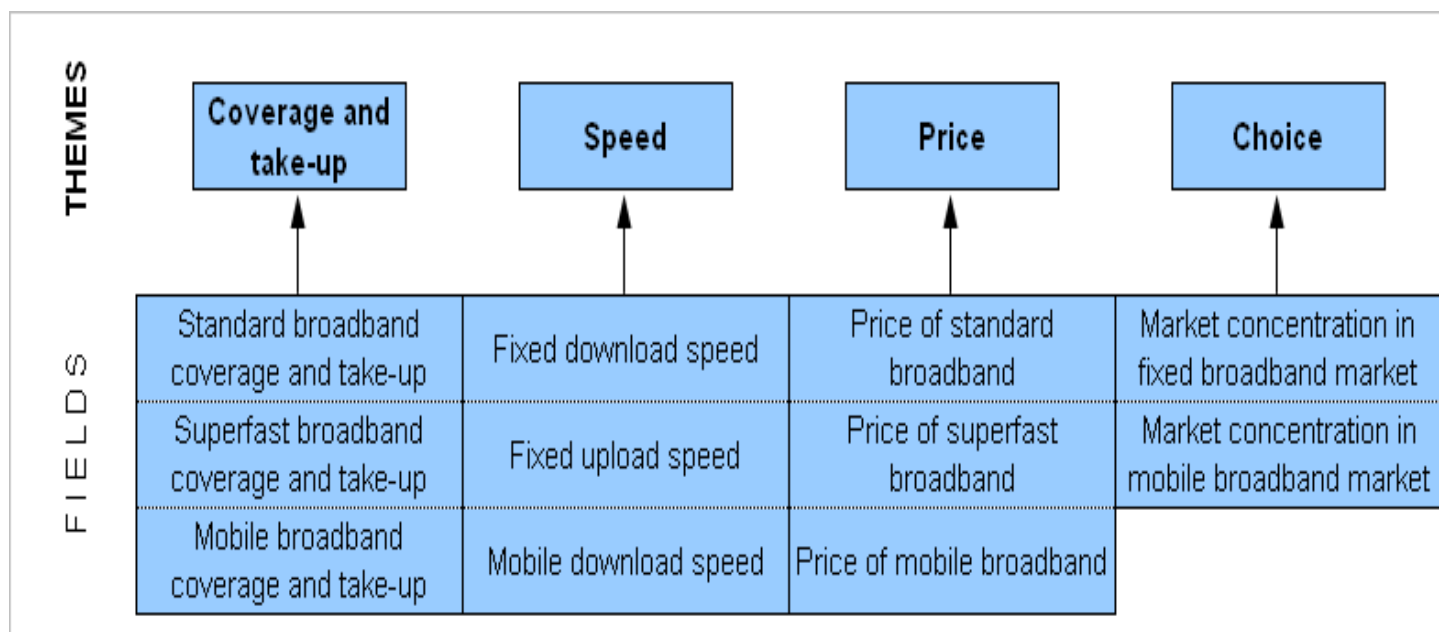
Regular use of selected communications services / media



Source: Ofcom consumer research, October 2011. Base sizes: UK=1015, France=1014, Germany=1014, Italy=1045, USA=1002, Australia = 1012. Q; Which of the following do you regularly do (at least once a week)? Select all that apply

Figure 1.13

Proposed measures to be included in the Broadband Best in Europe Scorecard

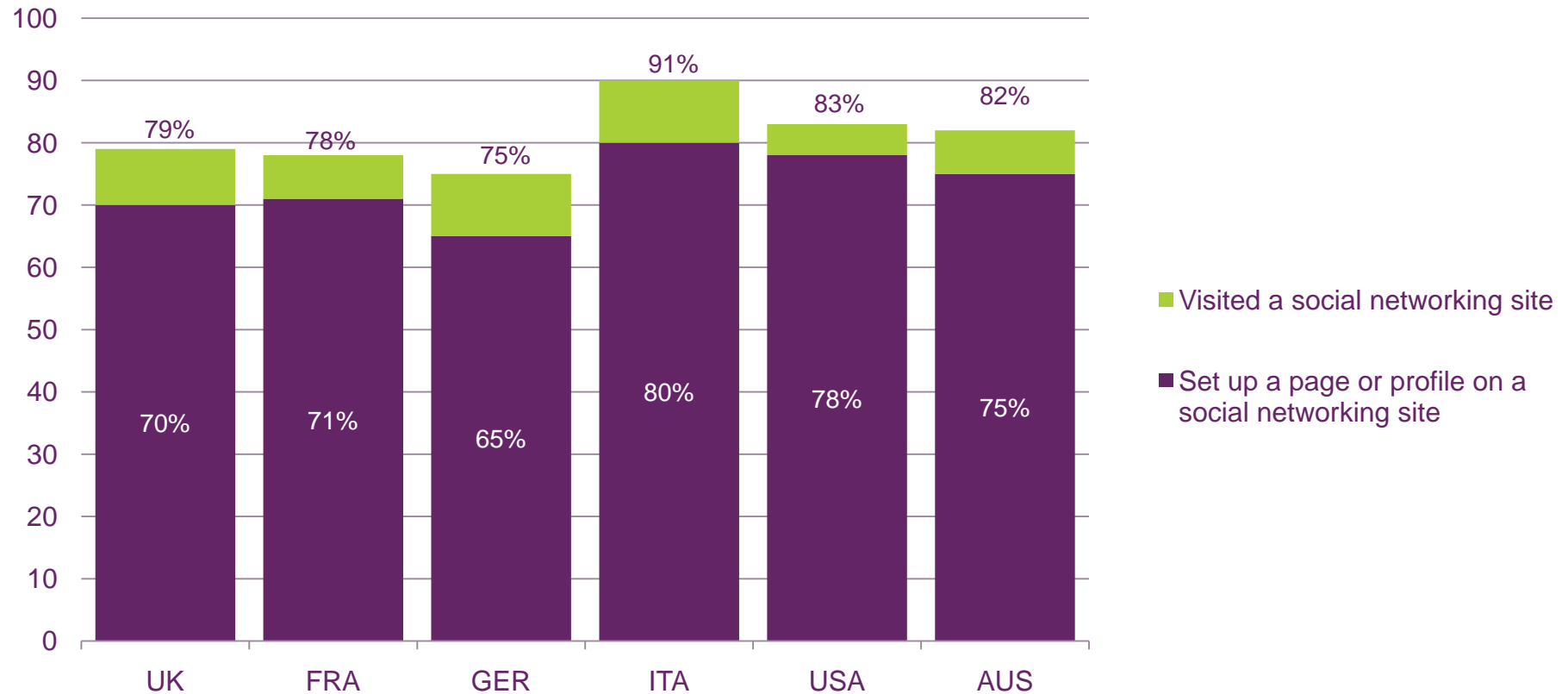


Source: Broadband Delivery UK

Figure 1.14

Consumers who have ever visited a social networking website and have a social network profile page

Frequency of visiting SNS / Set-up SNS profile page (%)



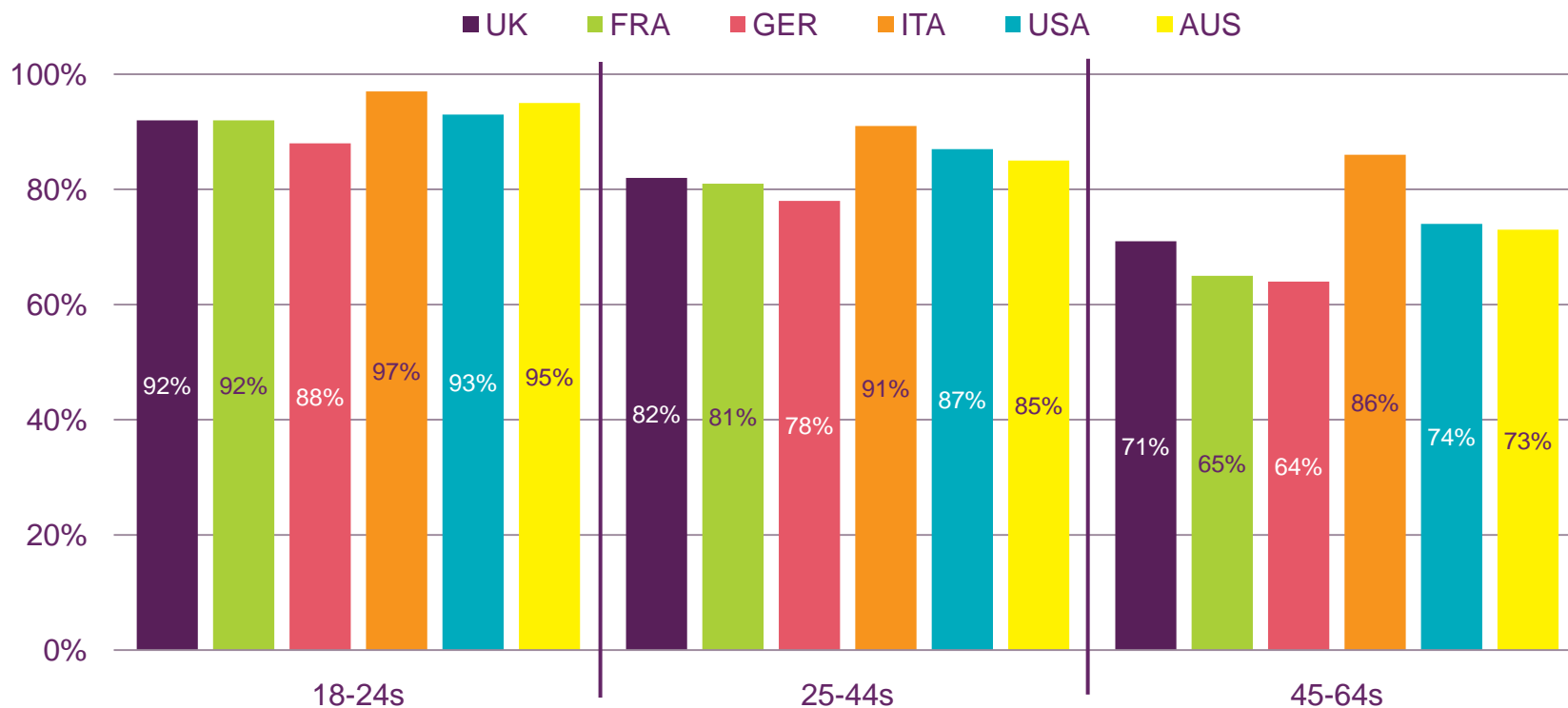
Source: Ofcom Consumer Research October 2011.

Base: All those who use the Internet. Sample size: UK=1015, France=1014, Germany=1014, Italy=1045, US=1002, Australia=1012

Q: "Have you ever visited a social networking site e.g. Facebook, Myspace, Bebo?", "Have you set up your own page or profile on any of the following social networking sites?"

Figure 1.15

Consumers who have visited a social networking website, by age



Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles. Base: Total sample sizes (18-24s, 25-44s, 45-64s): UK=144,474,397;

France=197,506,311; Germany= 192,486,336; Italy=201,534,310; US=147,189,366; Australia=152,480,380.

Q: "Have you ever visited a social networking site e.g. Facebook, Myspace, Bebo?"

Figure 1.16

Consumers who have visited a social networking website and have a profile (Top four sites with a profile page)

	UK	FRA	GER	ITA	USA	AUS
1st most popular site	Facebook 83%	Facebook 83%	Facebook 72%	Facebook 84%	Facebook 89%	Facebook 88%
2nd	Twitter 22%	Windows Live 17%	Stayfriends 22%	Twitter 14%	Twitter 24%	Myspace 18%
3rd	Friends Reunited 21%	Copains d'Avant 13%	Wer-kennt-wen 21%	Google+ 14%	Myspace 23%	Twitter 16%
4th	Myspace 12%	Twitter 8%	VZ Netzwerke 20%	LinkedIn 12%	LinkedIn 20%	LinkedIn 12%

Source: Ofcom Consumer Research October 2011.

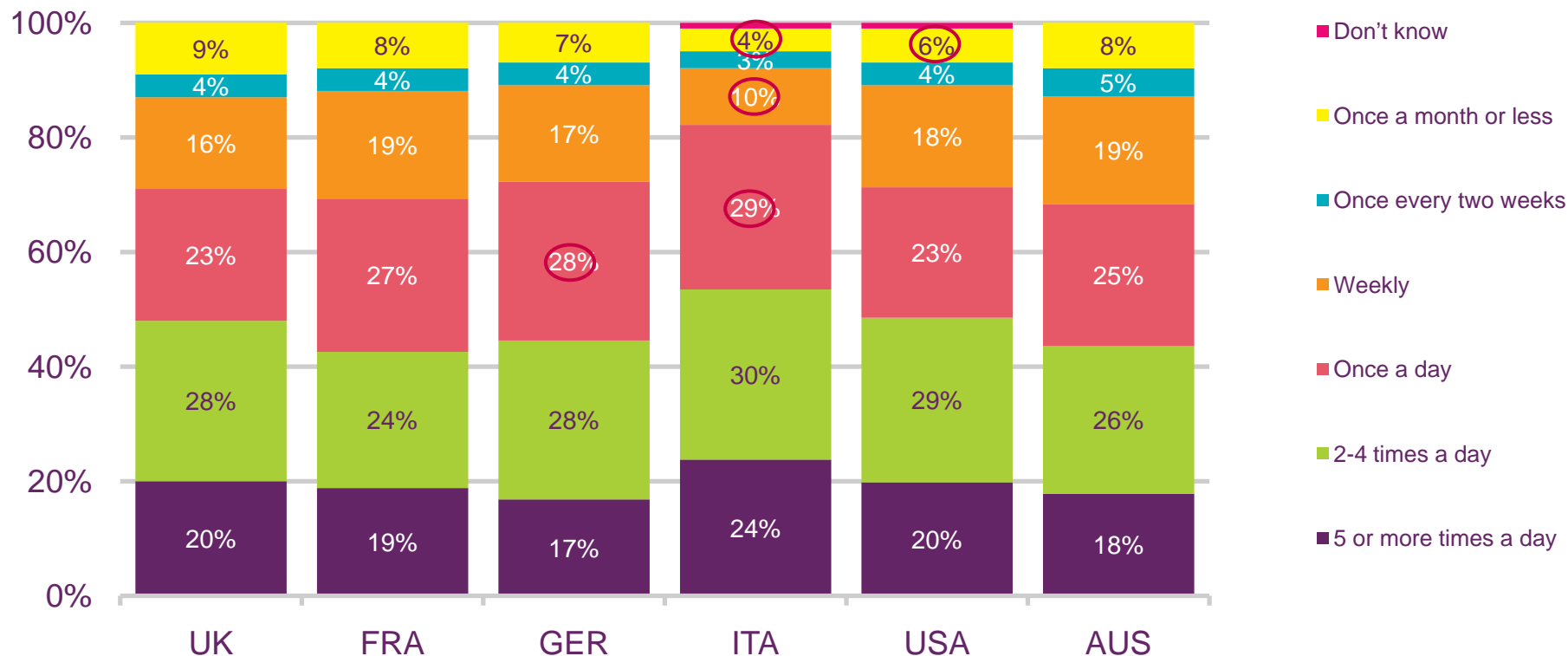
Base: All those who have visited a social networking site. Sample sizes: UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

Q: "Have you set up your own page or profile on any of the following social networking sites?"

Figure 1.17

Frequency of visiting social networking websites, among those with a profile page

Frequency of visiting social networking sites (%)



Source: Ofcom Consumer Research October 2011.

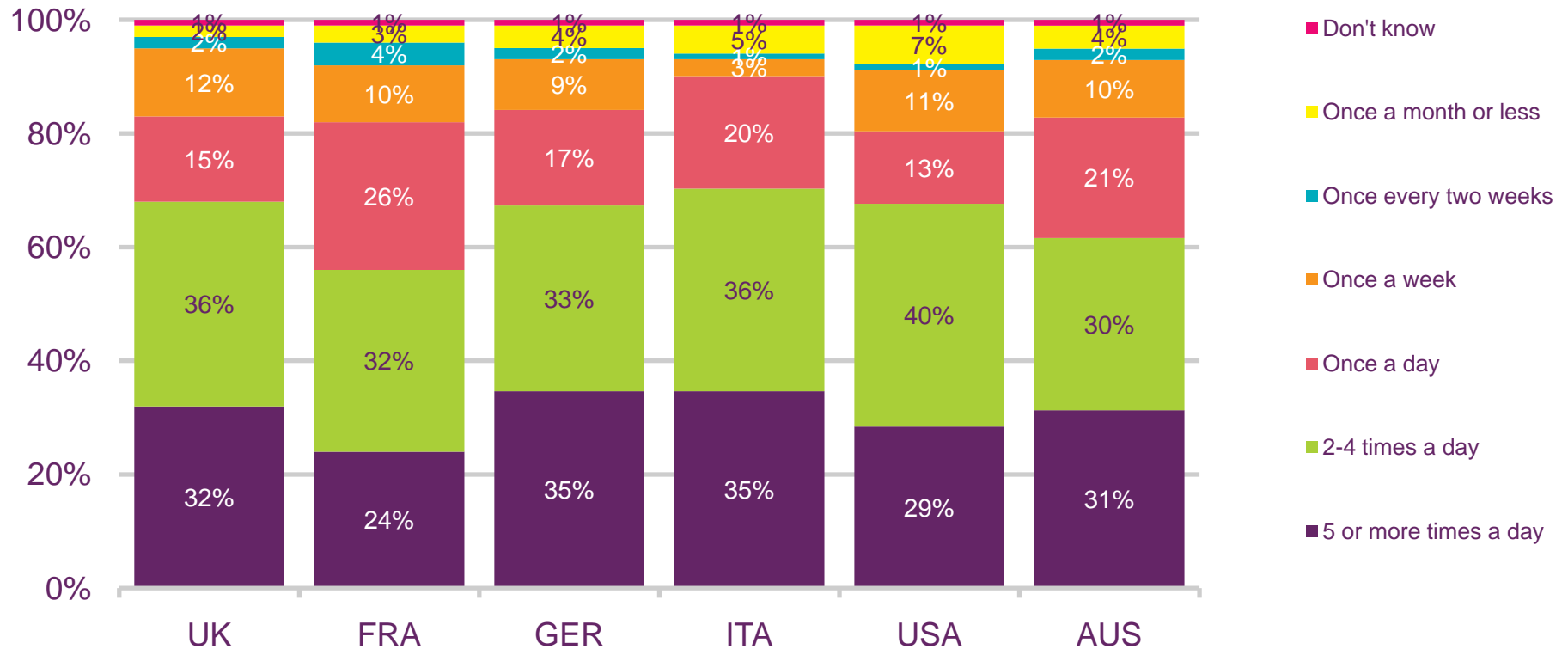
Base: All those who have ever visited a social networking site. Sample size: UK=802, France=791, Germany=753, Italy=946, US=830, Australia=832

Q: "How often do you visit social networking sites, please think of the site(s) you visit most often?"

Figure 1.18

Frequency of visiting social networking websites, by age: 18-24

Frequency of visiting social networking sites by age, 18-24 (%)



Source: Ofcom Consumer Research October 2011.

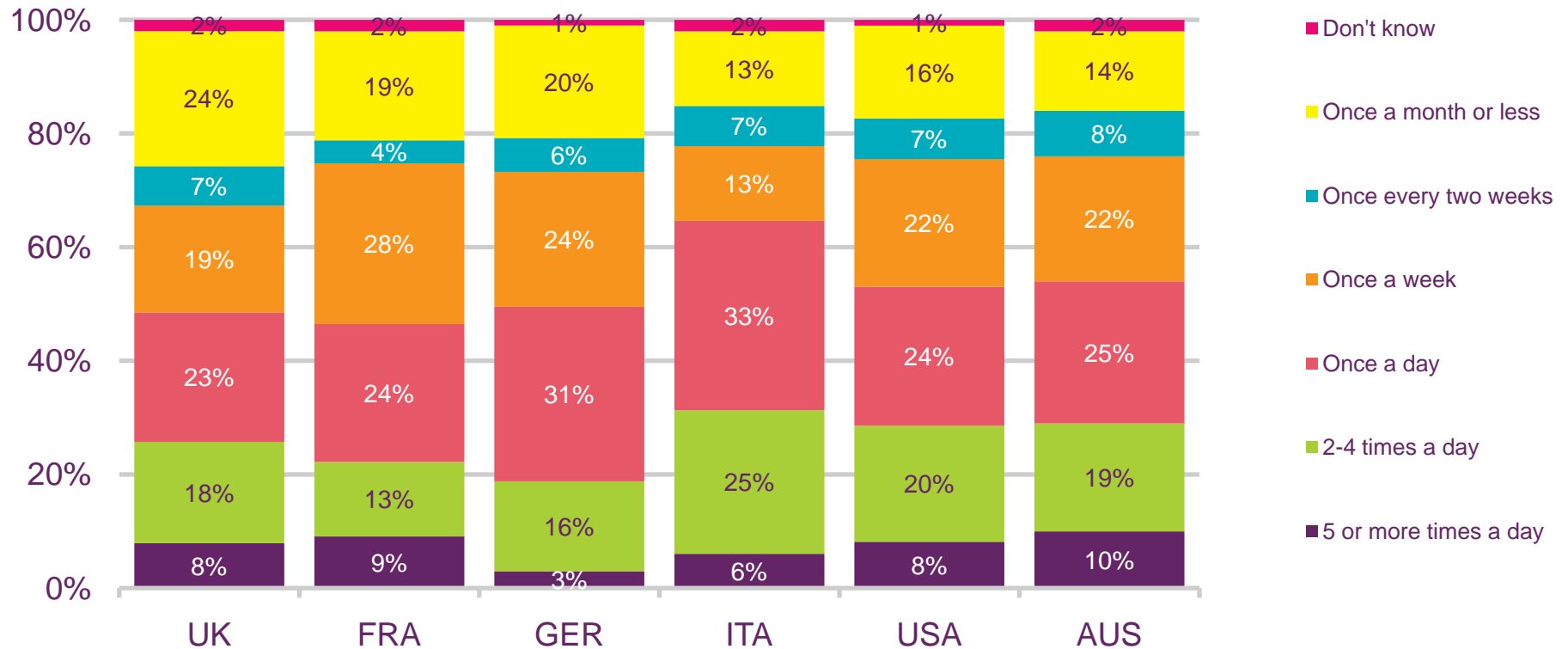
Base: All those who have ever visited a social networking site. Sample size: UK=802, France=791, Germany=753, Italy=946, US=830, Australia=832

Q: "How often do you visit social networking sites, please think of the site(s) you visit most often?"

Figure 1.19

Frequency of visiting social networking websites, by age: 45-64

Frequency of visiting social networking sites by age, 45-64 (%)



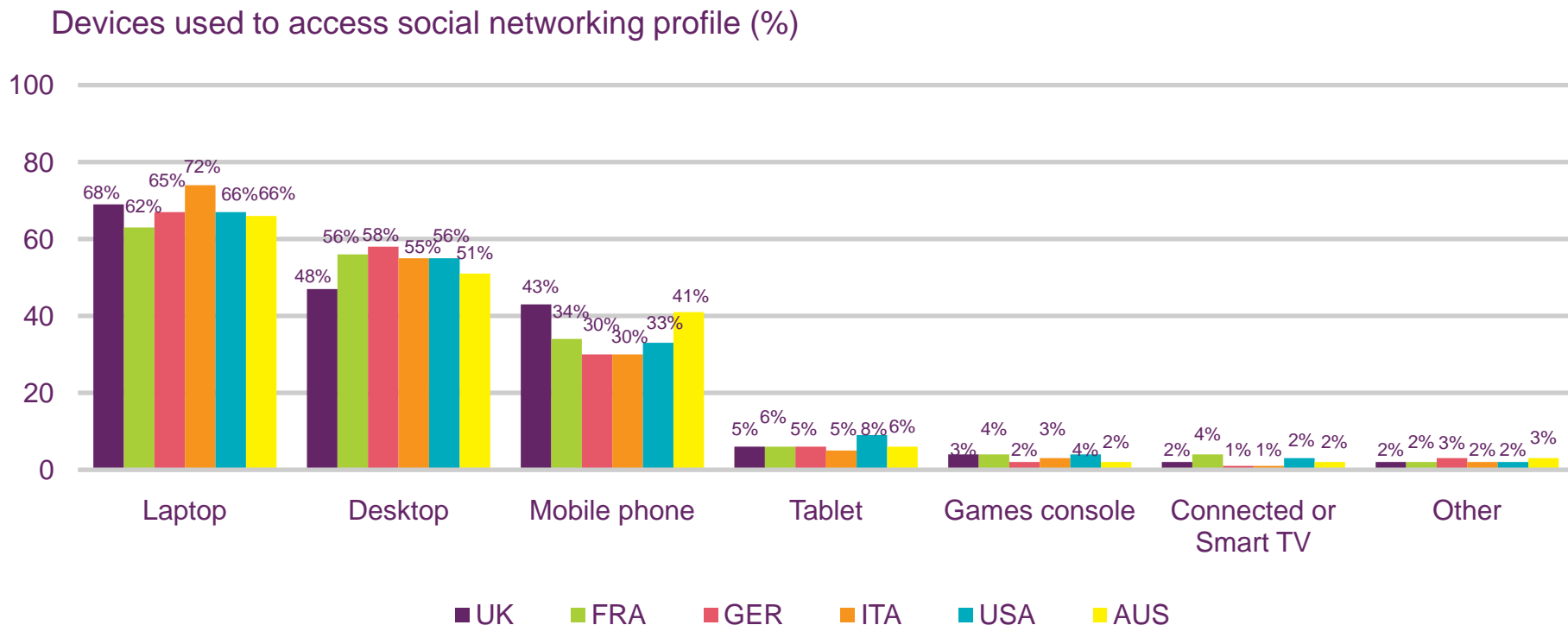
Source: Ofcom Consumer Research October 2011.

Base: All those who have ever visited a social networking site. Sample size: UK=802, France=791, Germany=753, Italy=946, US=830, Australia=832

Q: "How often do you visit social networking sites, please think of the site(s) you visit most often?"

Figure 1.20

Devices used to access social networking profile page



Source: Ofcom Consumer Research October 2011.

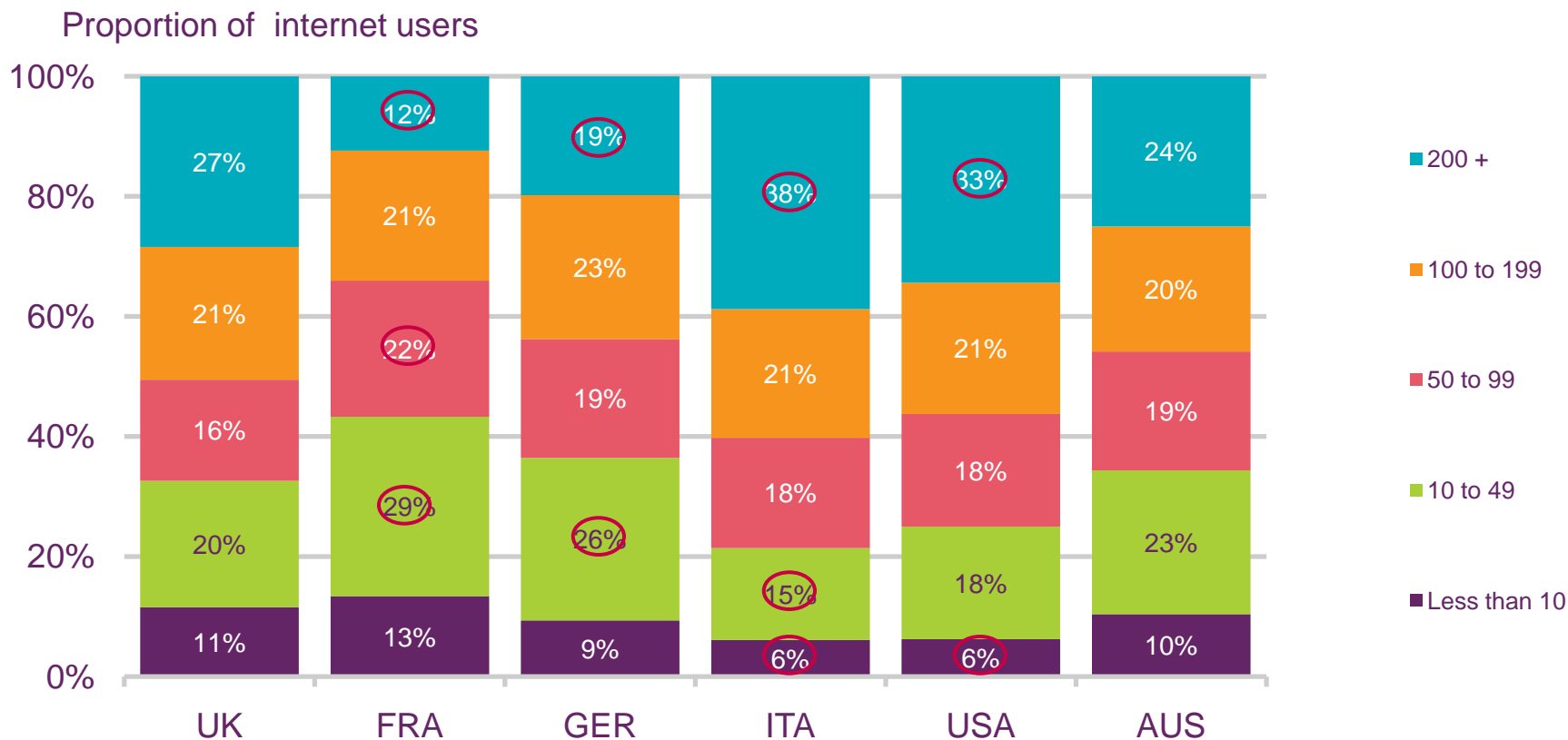
Base: All those who have a page or profile on a social networking site. Sample sizes: UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

Q: "Which of the following do you use to access social networking sites?"

Note: Mobile phone includes both "mobile phone via an app" and "Mobile phone via the web browser"

Figure 1.21

Number of connections / 'friends' on main social networking profile



Source: Ofcom Consumer Research October 2011

Base: (All Adults who have a page or profile on a social networking site): UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

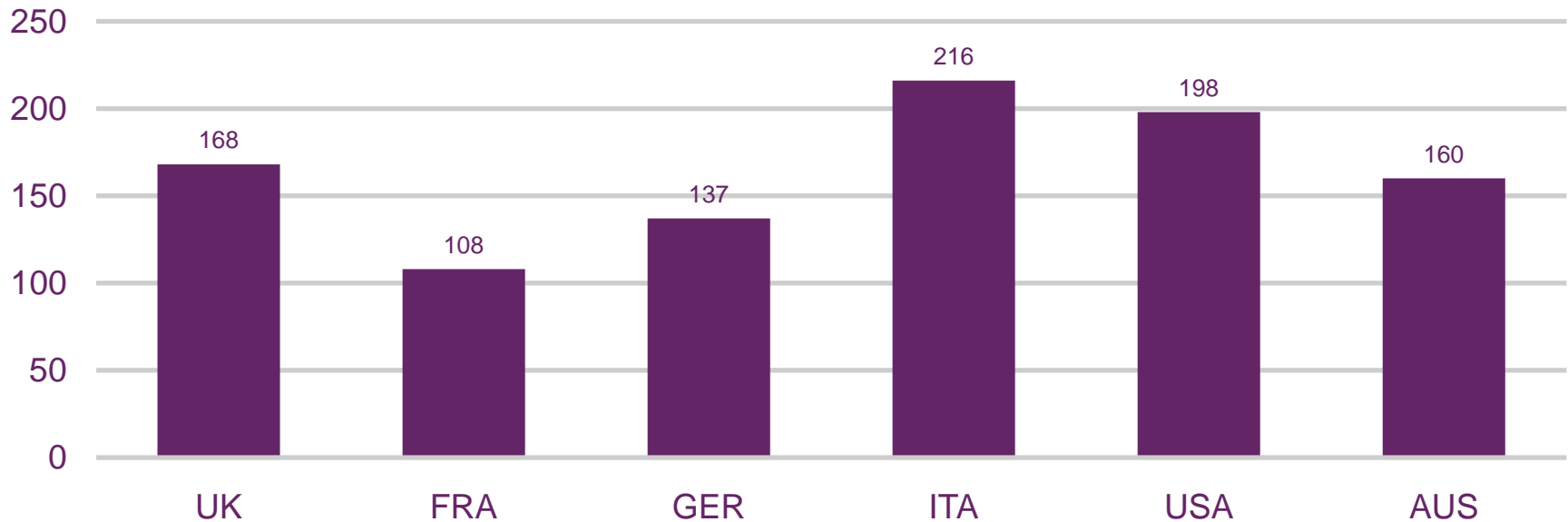
Q: How many connections or "Friends" do you have for your Social Network profile(s) (on average), please use the site you visit most often?

Note: Circled data points indicate statistically significant differences to the UK

Figure 1.22

Average number of connections / 'friends' on main social networking website

Average number of "friends" / Connections



Source: Ofcom Consumer Research October 2011

Base: (All Adults who have a page or profile on a social networking site): UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

Q: How many connections or "Friends" do you have for your Social Network profile(s) (on average), please use the site you visit most often?

Figure 1.23

Activities carried out on social networking sites

	UK	FR	GER	ITA	USA	AUS
Communicate with existing friends and family	85%	84%	69%	84%	90%	89%
To look at comments, photos, other information shared by 'friends/connections'	52%	45%	50%	48%	59%	58%
To reconnect with people lost contact with	49%	46%	61%	58%	61%	57%
To upload pictures	44%	21%	32%	40%	49%	40%
Communicate with people with similar interests and hobbies	27%	25%	30%	44%	28%	25%
For information on what's happening in my local area	26%	18%	38%	33%	27%	19%
For entertainment news and information	23%	29%	23%	20%	21%	21%
To upload videos	17%	13%	9%	23%	18%	14%
For information about national and global events	16%	13%	19%	30%	15%	21%
To look at campaigns and petitions	16%	10%	13%	26%	10%	13%
To network with business or professional contacts	13%	13%	24%	27%	17%	14%
Advertise to promote business	7%	5%	5%	12%	8%	9%

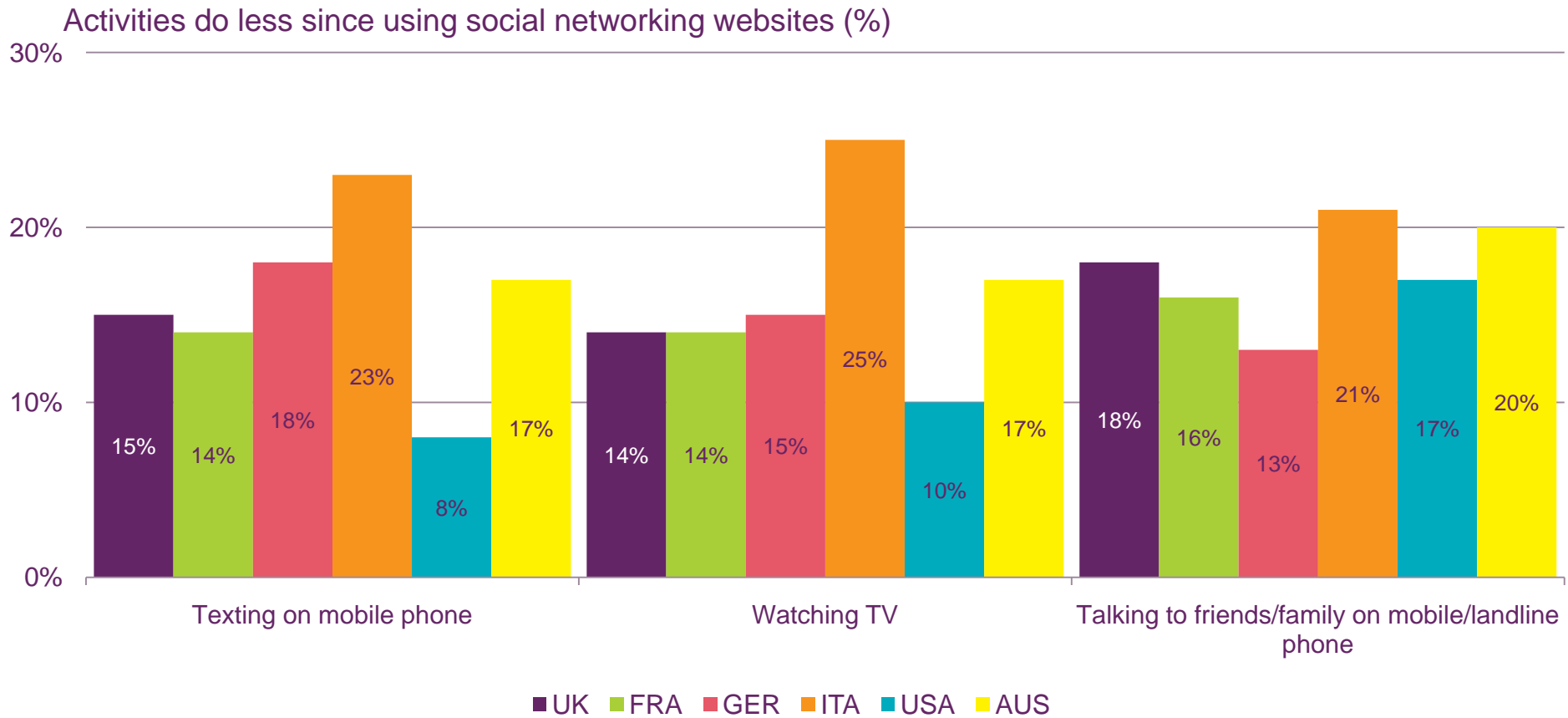
Source: Ofcom Consumer Research October 2011.

Base: All those who have visited a social networking site. Sample sizes: UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

Q: "Have you set up your own page or profile on any of the following social networking sites?"

Figure 1.24

Activities do less since using social networking websites



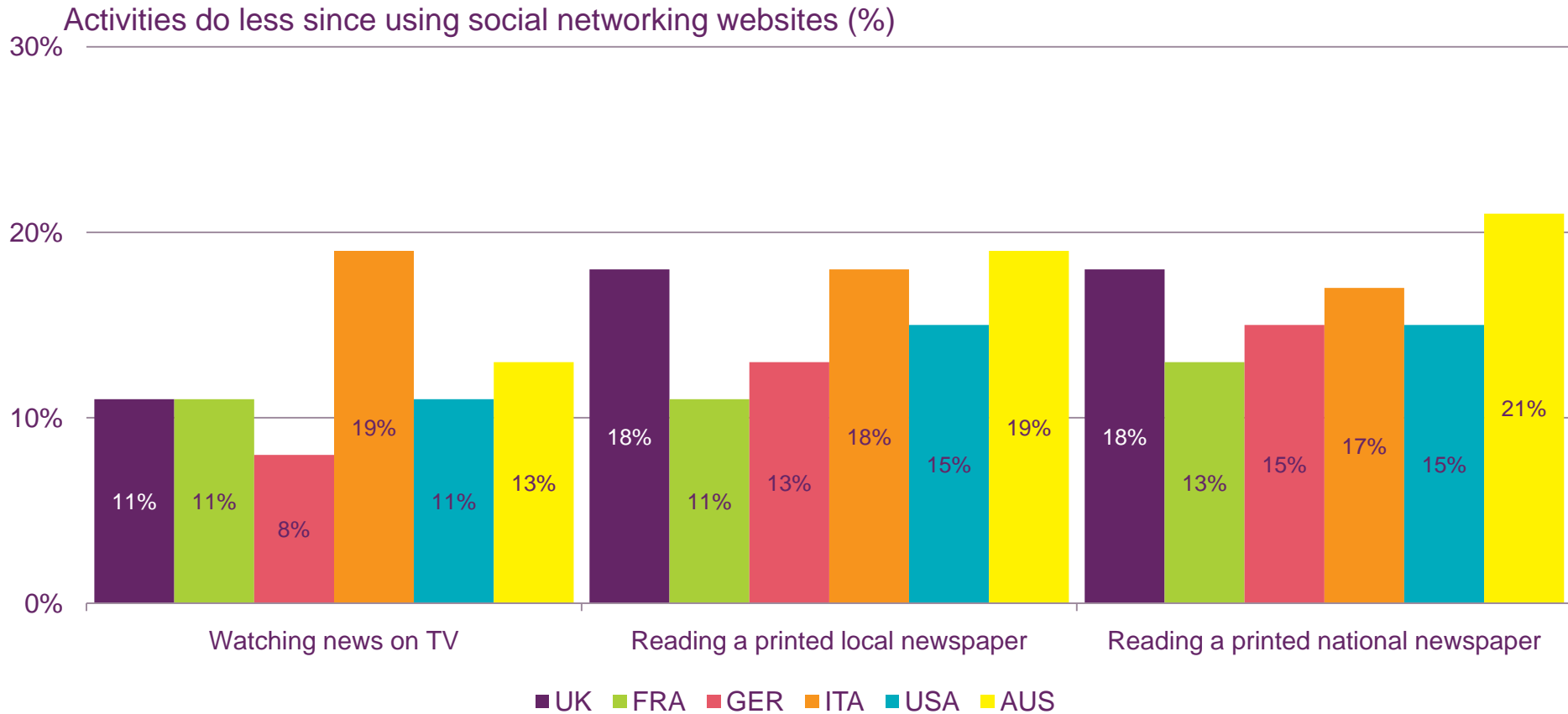
Source: Ofcom Consumer Research October 2011.

Base: All those who have visited a social networking site. Sample sizes: UK=804, France=792, Germany=760, Italy=946, US=833, Australia=832

Q: "Since you've used social networking websites, which of the following activities do you now take part in MORE or LESS than you used to?"

Figure 1.25

Media used less since using social networking websites



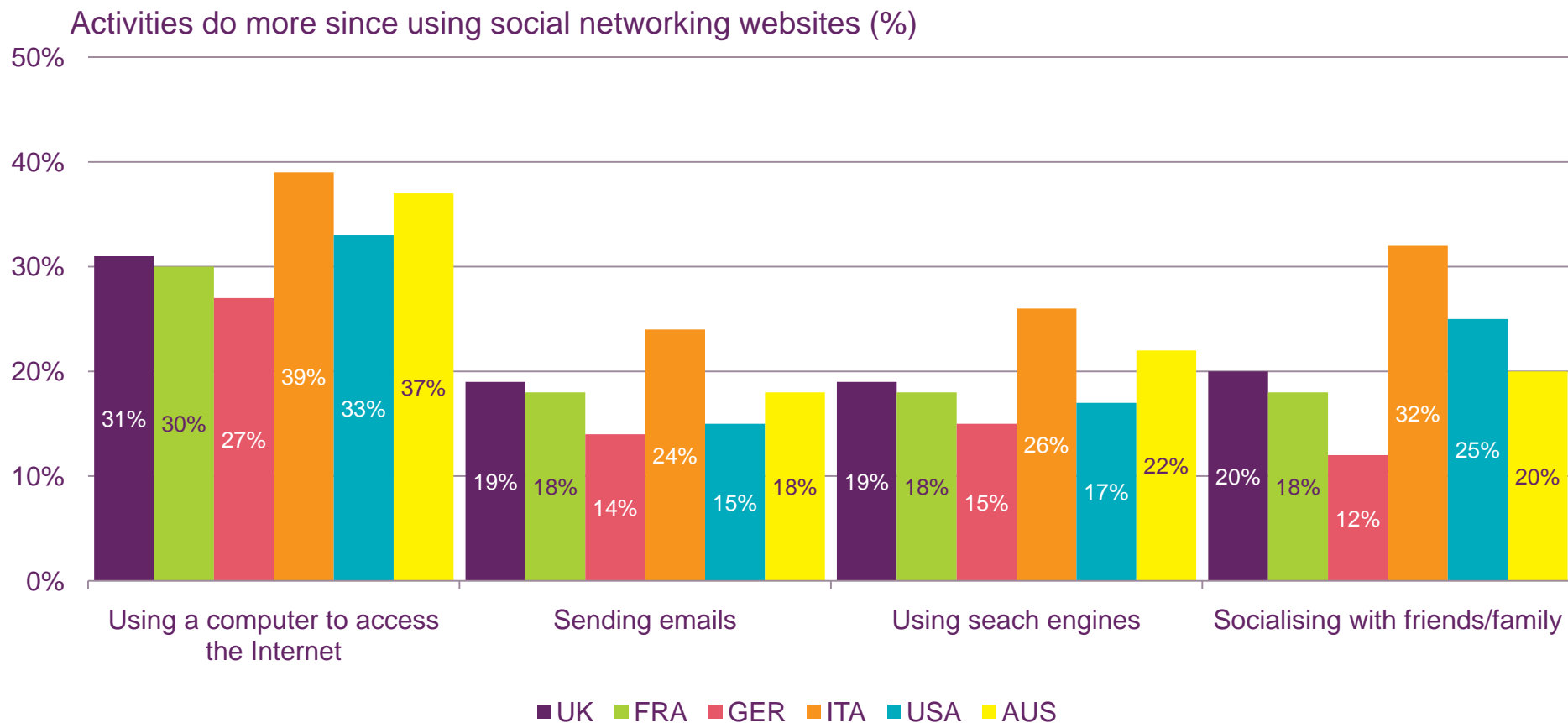
Source: Ofcom Consumer Research October 2011.

Base: All those who have visited a social networking site. Sample sizes: UK=804, France=792, Germany=760, Italy=946, US=833, Australia=832

Q: "Since you've used social networking websites, which of the following activities do you now take part in MORE or LESS than you used to?"

Figure 1.26

Activities done more since using social networking websites



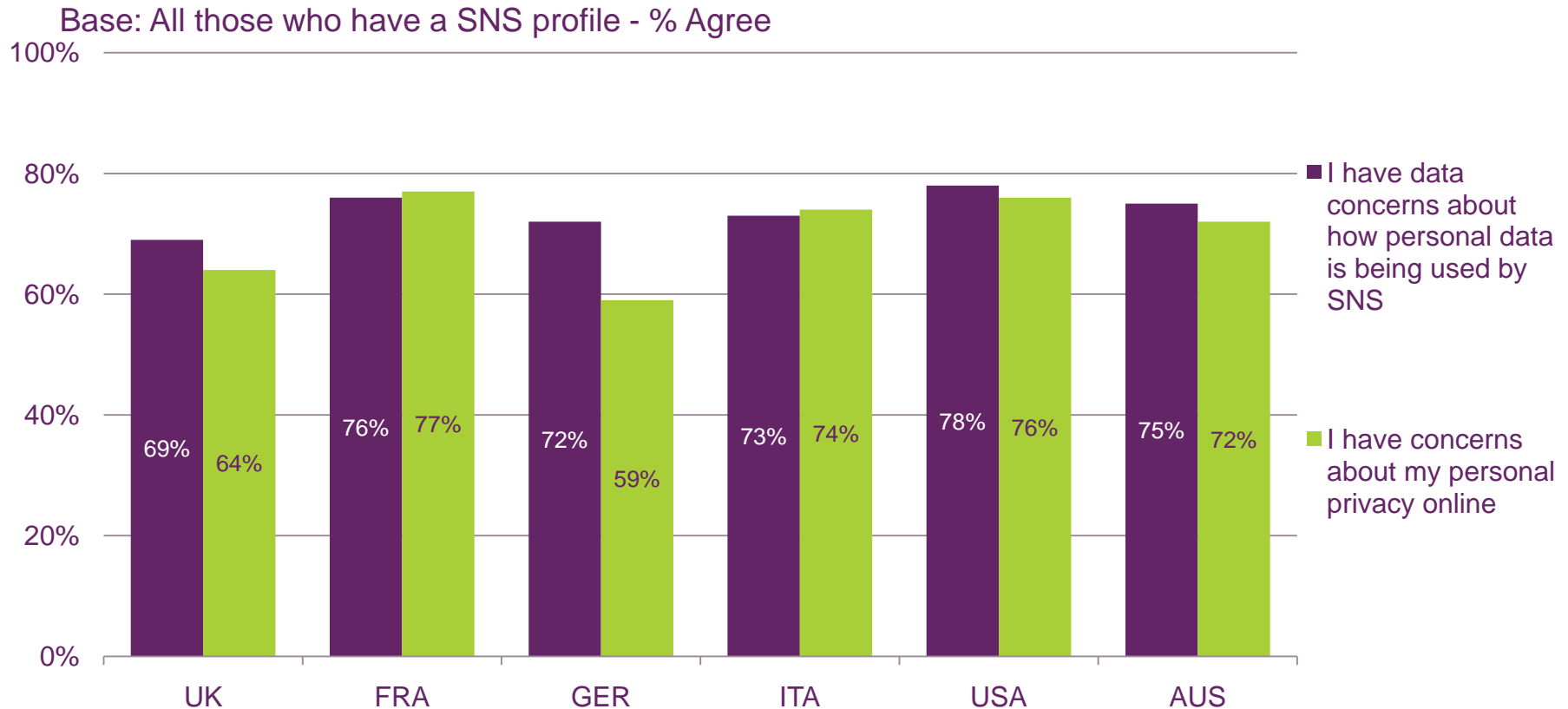
Source: Ofcom Consumer Research October 2011.

Base: All those who have visited a social networking site. Sample sizes: UK=804, France=792, Germany=760, Italy=946, US=833, Australia=832

Q: "Since you've used social networking websites, which of the following activities do you now take part in MORE or LESS than you used to?"

Figure 1.27

Those who agree they have concerns about privacy online and how personal data is used by social networking sites



Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles/Base: Total sample size: UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

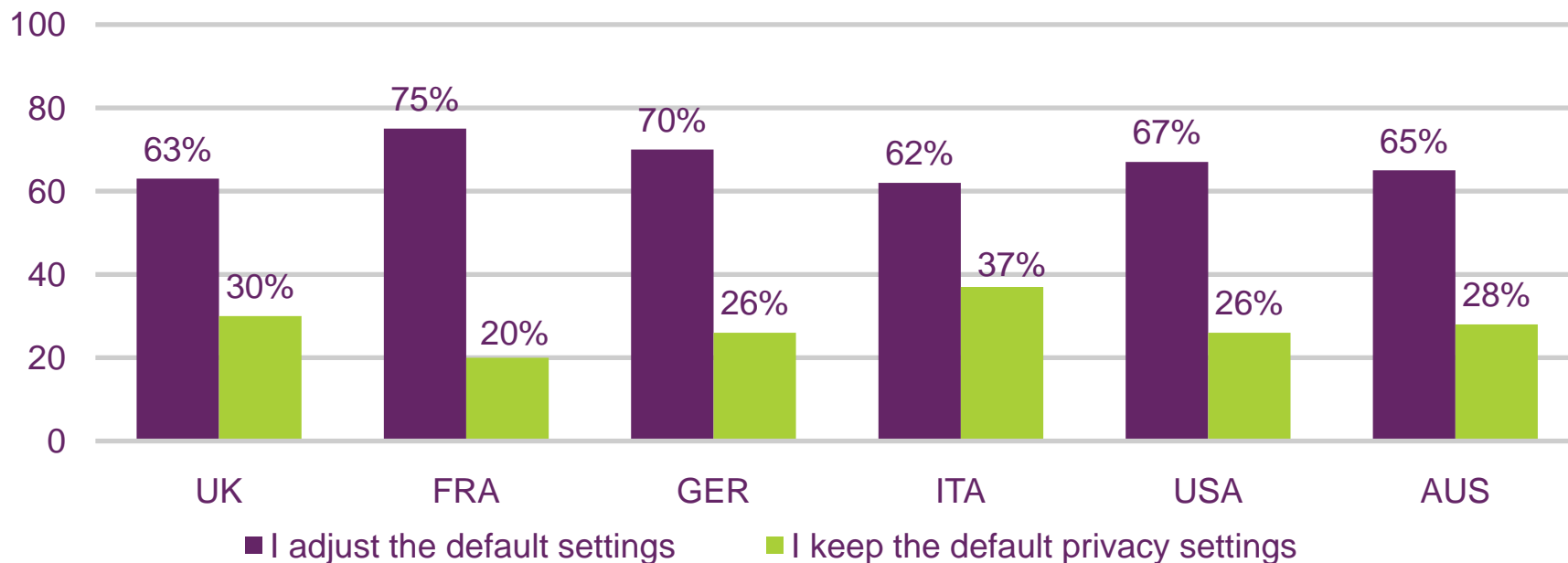
Q: "From the statements below can you please confirm how much you agree or disagree with them.... " [Respective statements as charted]

Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total 'agree' charted (all those saying 4 or 5)

Figure 1.28

Privacy settings on social networking websites

Privacy settings when using social networking sites (%)



Source: Ofcom Consumer Research October 2011.

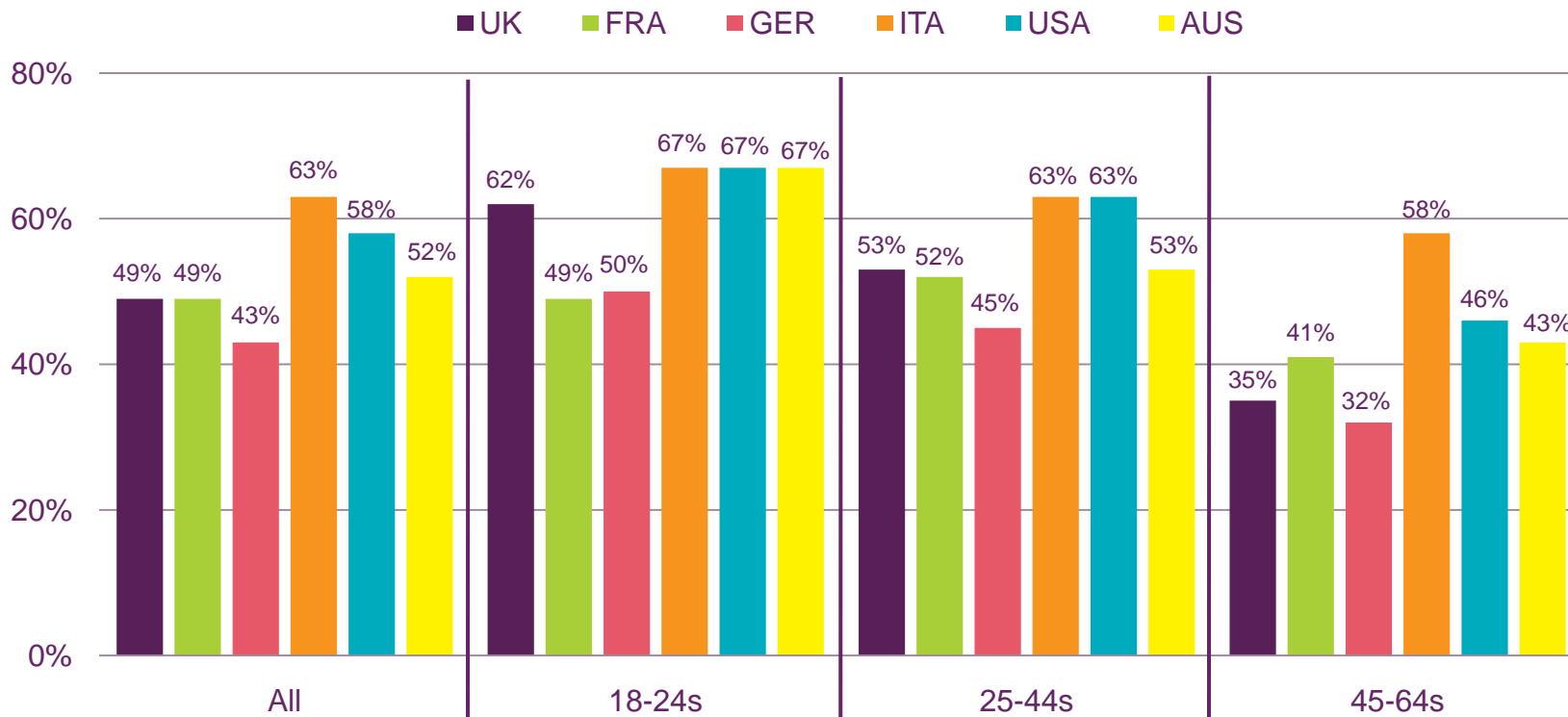
Base: All those who have a page or profile on a social networking site. Sample size: UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

Q: "Do you generally amend your privacy settings when using Social Network sites or do you keep the default settings?"

Figure 1.29

Those who agree “social networking has significantly changed the way they communicate with people” by age

All those who agreed with statement (scoring 4 or 5 from a scale of 1-5)



Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles Base: Total sample sizes (All, 18-24s, 25-44s, 45-64s): UK=715,130,361,224;

France=717,175,370,172; Germany= 658,151,334,173; Italy=841,180,431,230; US=778,130,410,238; Australia=755,136,379,240.

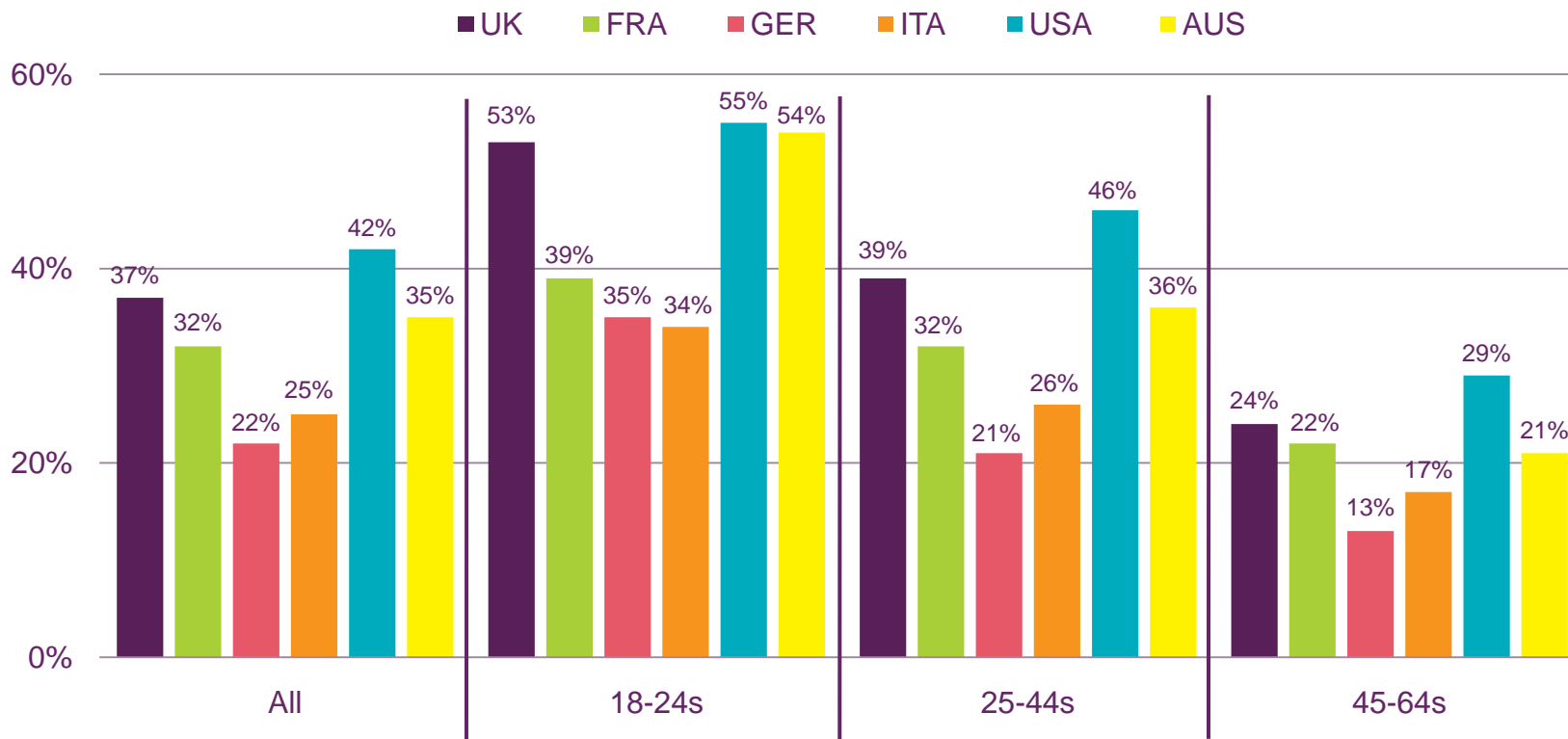
Q:

“From the statements below can you please confirm how much you agree or disagree with them: Social networking has significantly changed the way I communicate with people”. Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree’ charted (all those saying 4 or 5)

Figure 1.30

Those who agree “I would feel out of touch without social networking sites”, by age

All those who agreed with statement (scoring 4 or 5 from a scale of 1-5)



Source: Ofcom Consumer Research October 2011.

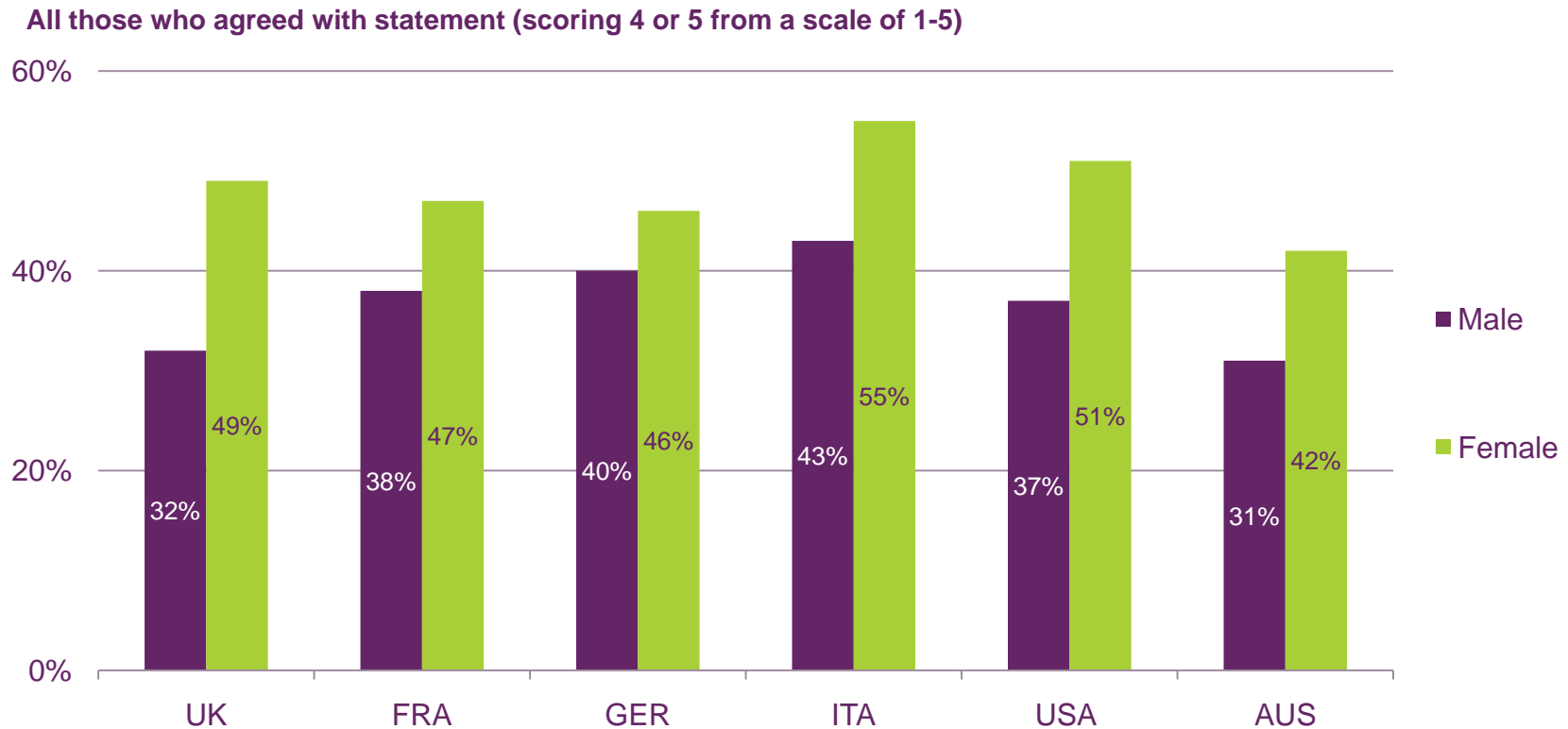
Base: For each country - all those with SNS profiles. Base: Total sample sizes (All, 18-24s, 25-44s, 45-64s): UK=715,130,361,224; France=717,175,370,172; Germany= 658,151,334,173; Italy=841,180,431,230; US=778,130,410,238; Australia=755,136,379,240.

Q:

“From the statements below can you please confirm how much you agree or disagree with them: I would feel out of touch without social networking sites”. Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree charted (all those saying 4 or 5)

Figure 1.31

Those who regularly update social networking profile, by gender



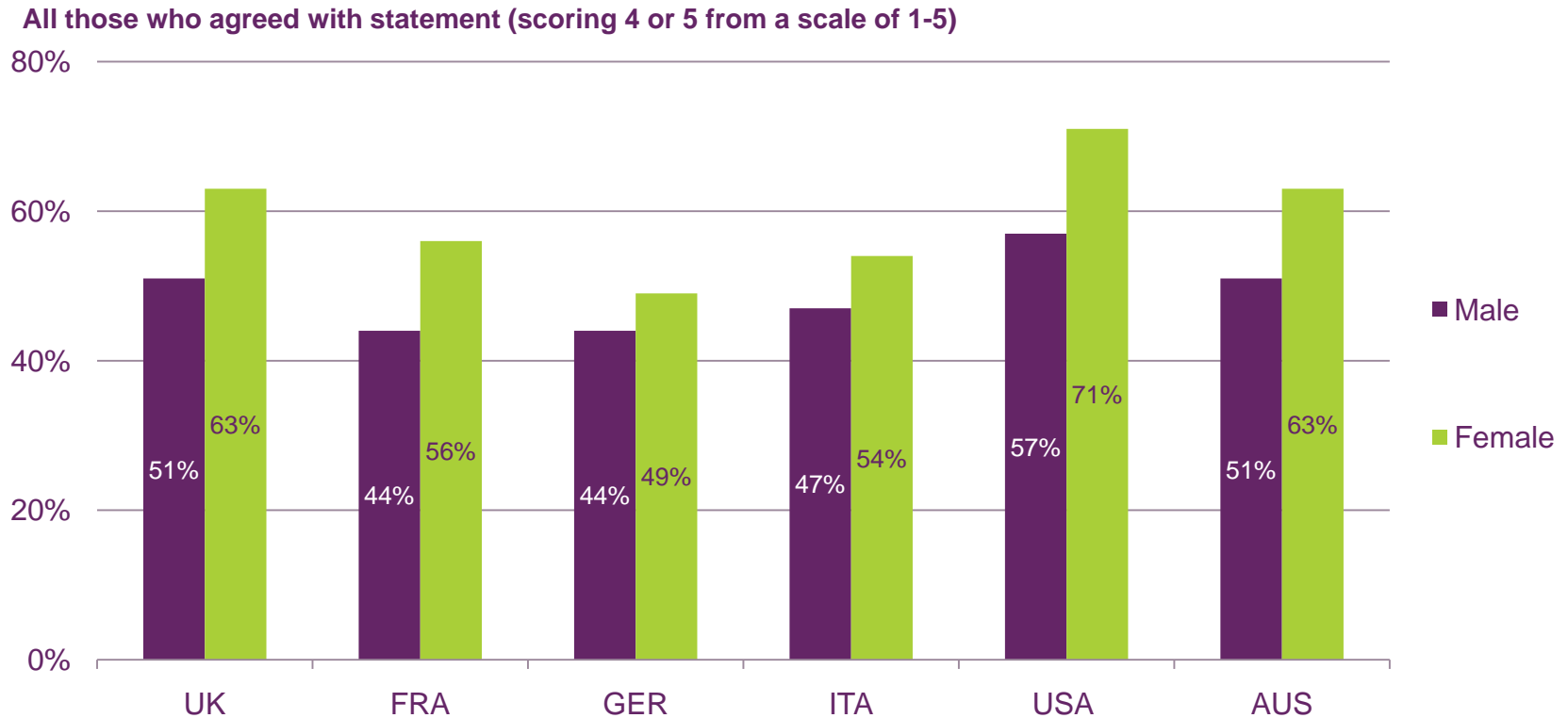
Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles. Base: Total sample size (Male, Female): UK=345, 370; France=369,348; Germany=353,304; Italy=426,415, USA=357,421, Australia=365,390.

Q: "From the statements below can you please confirm how much you agree or disagree with them: I regularly update my Social networking site(s)". Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total 'agree' charted (all those saying 4 or 5)

Figure 1.32

Those who mainly use social networking sites to see what other people are saying and doing, by gender



Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles. Base: Total sample size (Male, Female): UK=345, 370; France=369,348; Germany=353,304; Italy=426,415, USA=357,421, Australia=365,390.

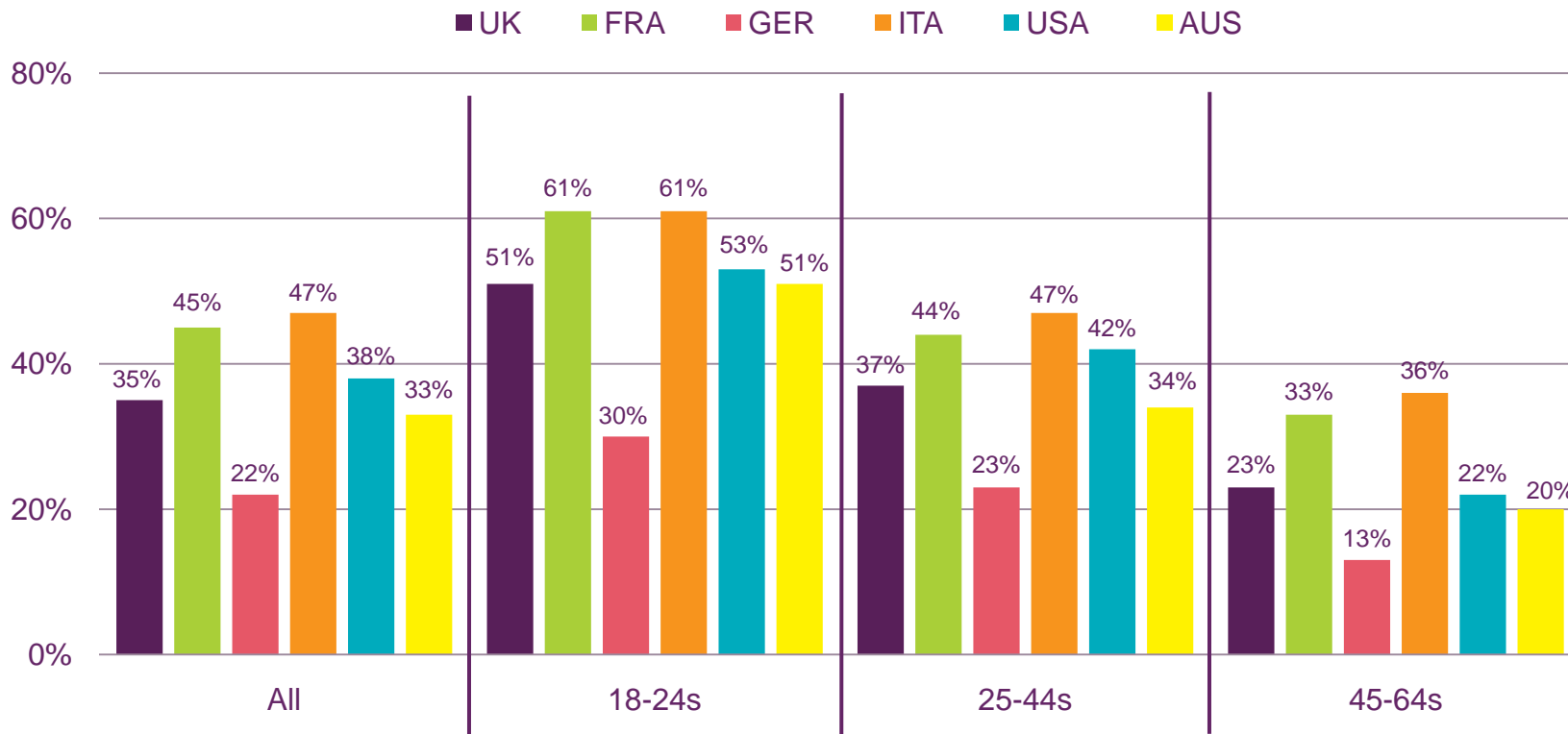
Q: "From the statements below can you please confirm how much you agree or disagree with them: I mainly use Social networking sites to see what other people are saying and doing". Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree.

Total 'agree' charted (all those saying 4 or 5)

Figure 1.33

Use of social networking sites for breaking news, by age

All those who agreed with statement (scoring 4 or 5 from a scale of 1-5)



Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles. Base: Total sample sizes (All, 18-24s, 25-44s, 45-64s): UK=715,130,361,224;

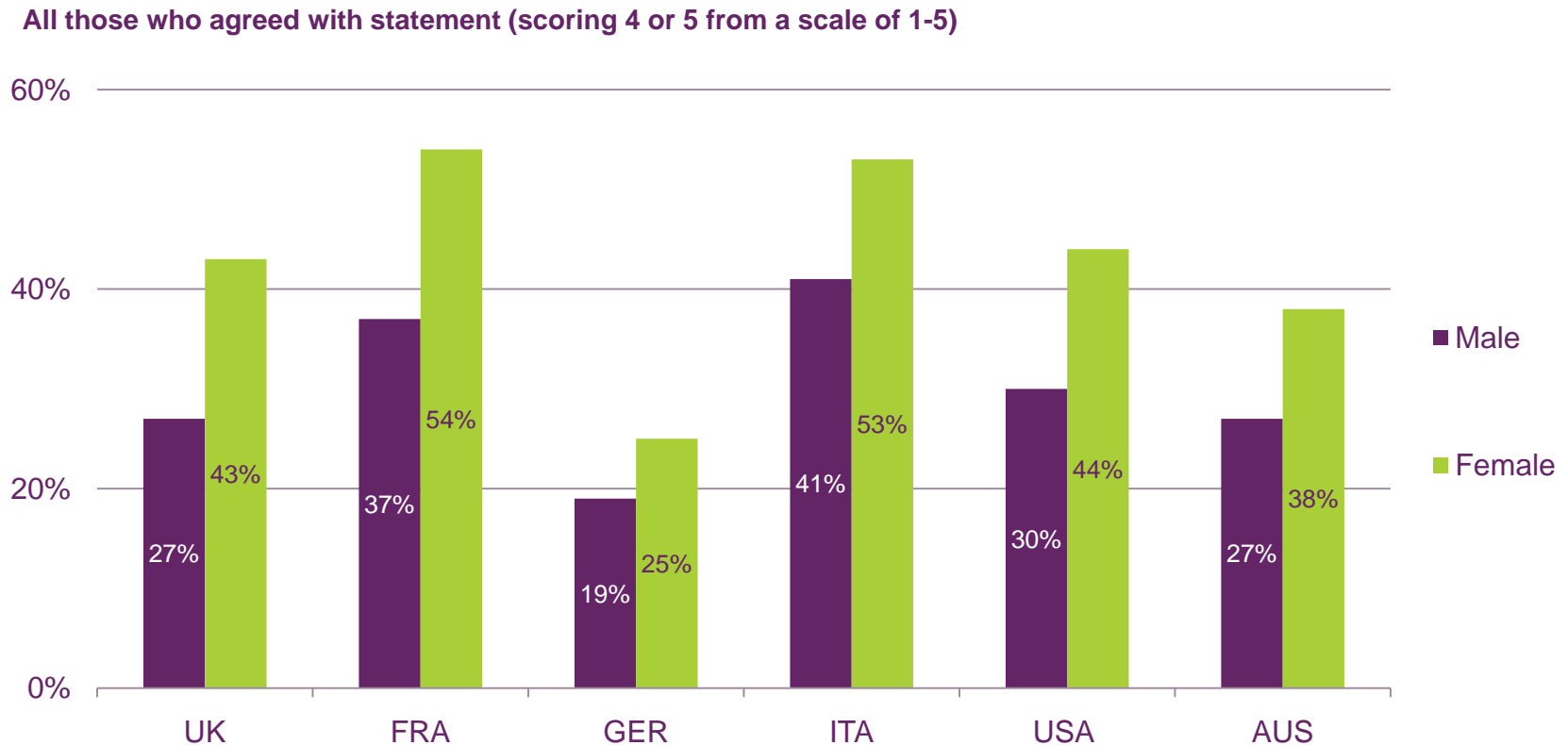
France=717,175,370,172; Germany= 658,151,334,173; Italy=841,180,431,230; US=778,130,410,238; Australia=755,136,379,240.

Q:

“From the statements below can you please confirm how much you agree or disagree with them: I often find out about new breaking stories first via social networking sites”. Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree’ charted (all those saying 4 or 5)

Figure 1.34

Use of social networking sites for breaking news, by gender



Source: Ofcom Consumer Research October 2011.

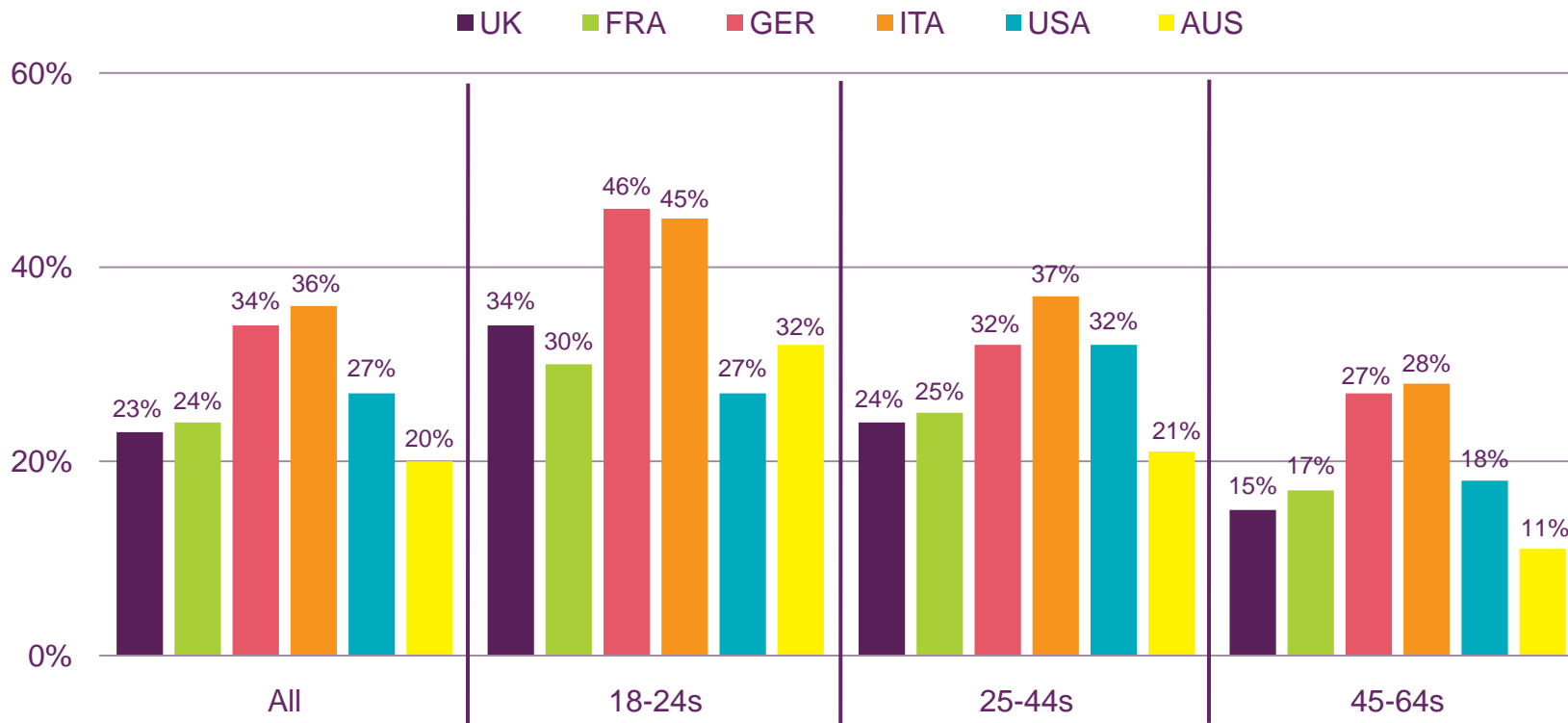
Base: For each country - all those with SNS profiles. Base: Total sample size (Male, Female): UK=345, 370; France=369,348; Germany=353,304; Italy=426,415, USA=357,421, Australia=365,390.

Q: "From the statements below can you please confirm how much you agree or disagree with them: I often find out about new breaking stories first via Social networking sites". Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total 'agree' charted (all those saying 4 or 5)

Figure 1.35

Those who agree “I engage more with my local community as a result of social networking sites”, by age

All those who agreed with statement (scoring 4 or 5 from a scale of 1-5)



Source: Ofcom Consumer Research October 2011.

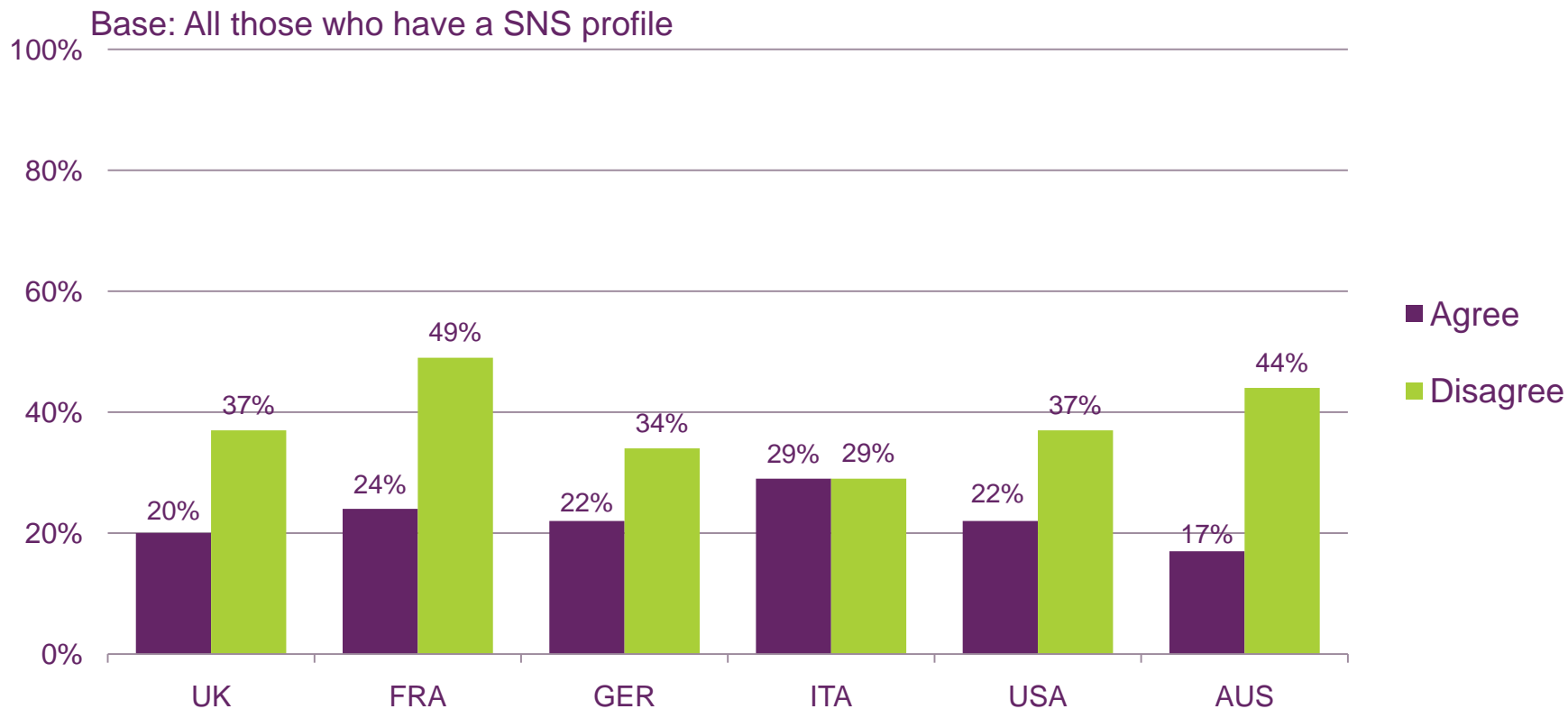
Base: For each country - all those with SNS profiles. Base: Total sample sizes (All, 18-24s, 25-44s, 45-64s): UK=715,130,361,224;

France=717,175,370,172; Germany= 658,151,334,173; Italy=841,180,431,230; US=778,130,410,238; Australia=755,136,379,240.

Q: “From the statements below can you please confirm how much you agree or disagree with them: I engage more with my local community as a result of social networking sites”. Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree’ charted (all those saying 4 or 5)

Figure 1.36

Those who agree / disagree “I trust the information on social networking sites”



Source: Ofcom Consumer Research October 2011.

Base: All those with SNS profiles : UK=715, France=717, Germany=658, Italy=841, US=778, Australia=755

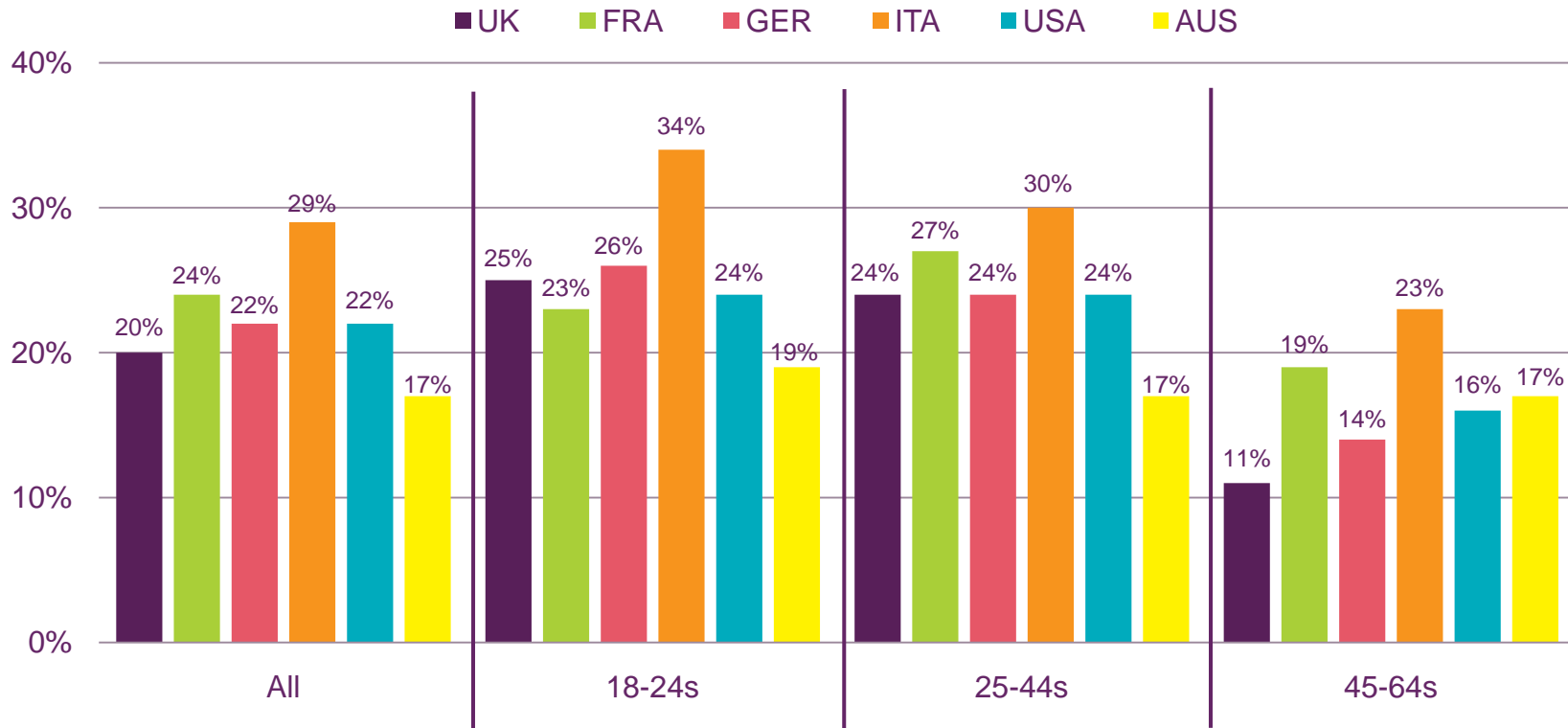
Q: “From the statements below can you please confirm how much you agree or disagree with them.... “I trust the information on social networking sites”

Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree’(all those saying 4 or 5) and ‘disagree’ (all those saying 1 or 2)

Figure 1.37

Those who agree “I trust the information on social networking sites”, by age

All those who agreed with statement (scoring 4 or 5 from a scale of 1-5)



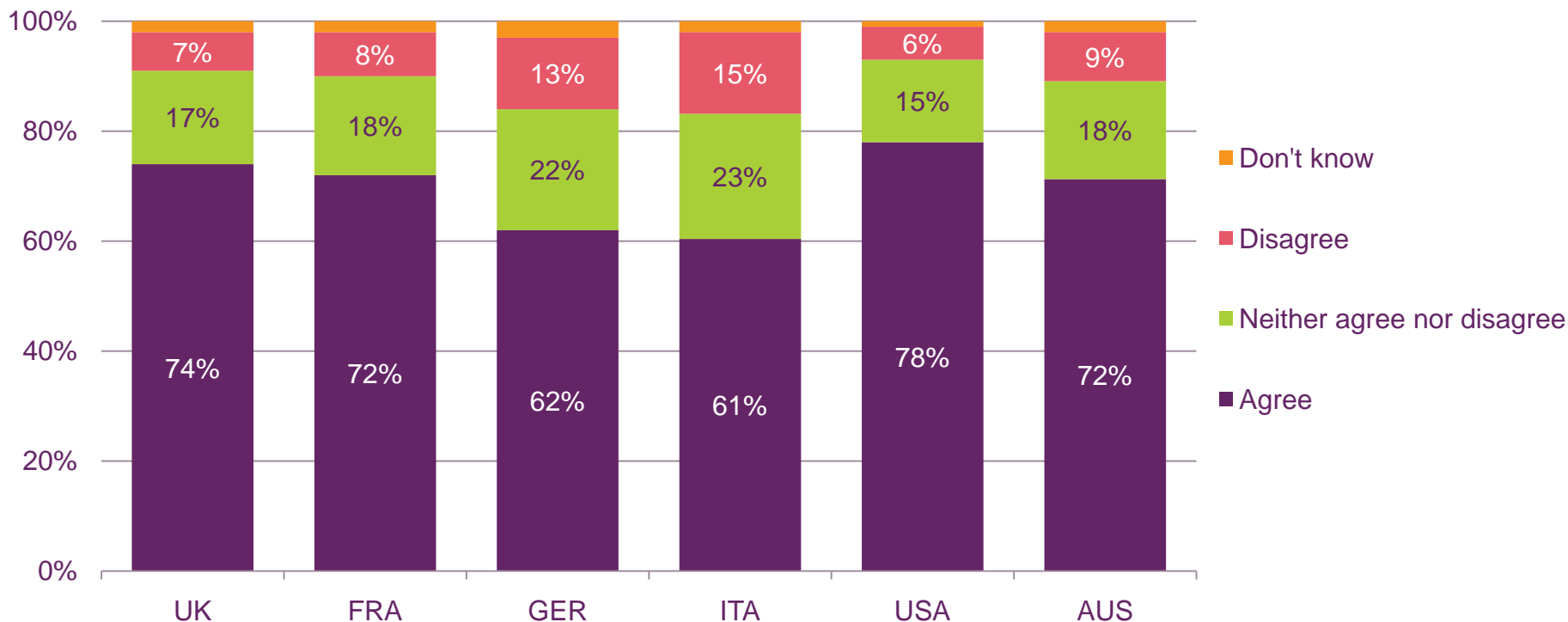
Source: Ofcom Consumer Research October 2011.

Base: For each country - all those with SNS profiles. Base: Total sample sizes (All, 18-24s, 25-44s, 45-64s): UK=715,130,361,224; France=717,175,370,172; Germany= 658,151,334,173; Italy=841,180,431,230; US=778,130,410,238; Japan=542,110,316,116; Australia=755,136,379,240. Q: “From the statements below can you please confirm how much you agree or disagree with them: I trust the information on Social networking sites”. Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree. Total ‘agree’ charted (all those saying 4 or 5)

Figure 1.38

Consumers without a social networking profile: attitude towards statement “I don’t have any interest in social networking sites”

Base: All those who have not visited SNS and/or don’t have a SNS profile



Source: Ofcom Consumer Research October 2011.

Base: All those who have not visited SNS and/or don't have a SNS profile. Sample sizes: UK=300, France=297, Germany=356, Italy=204, US=224, Australia=257

Q: "From the statements below can you please confirm how much you agree or disagree with them: I don't have any interest in social networking sites". Scale of 1-5 used where 1 = Strongly disagree, 3 = neither agree nor disagree, 5 = Strongly agree.