ICMR 2009 statistical release

17 December 2009

1. Overview

Figure 1.1

Total communications service retail revenue, by sector: 2003 to 2008 (£bn)

	2003	2004	2005	2006	2007	2008
Telecoms	329.2	343.6	355.5	365.4	374.5	374.2
TV	116.2	123.6	129.0	138.2	147.5	152.4
Radio	19.5	20.8	21.5	22.2	22.5	21.7
Total	464.9	488.0	506.0	525.8	544.5	548.4

Source: IDATE / industry data / Ofcom
Note: Covers only the 12 countries in the analysis

Figure 1.2

Total communications service retail revenue, 2008 (£bn)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Telecoms	27.80	29.11	34.30	23.29	144.17	15.73	58.61	7.11	19.90	8.10	3.72	2.40
TV	10.49	8.85	10.12	7.48	81.32	3.10	20.28	2.13	4.44	2.09	1.35	0.77
Radio	1.26	1.17	2.59	1.07	11.03	1.07	2.03	0.15	0.51	0.38	0.29	0.19
Total	39.55	39.13	47.01	31.84	236.52	19.89	80.92	9.39	24.85	10.56	5.36	3.36

Source: IDATE / industry data / Ofcom
Note: Covers only the 12 countries in the analysis

Figure 1.3

Per-capita communications service revenue by sector, 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Fixed line	150.8	146.0	150.7	134.7	152.4	179.9	127.2	40.9	118.3	122.3	149.0	232.7
Mobile	252.3	247.1	216.9	214.9	264.7	222.6	284.7	121.2	260.2	259.9	186.1	298.3
Broadband	53.1	59.6	48.8	51.1	57.4	71.0	48.0	22.7	56.6	97.7	76.2	47.7
Pay TV	70.9	67.6	40.1	43.8	136.6	29.5	54.5	29.2	36.4	48.1	73.9	73.5
Radio	20.7	18.1	31.4	18.4	36.3	31.4	16.0	3.9	11.1	22.3	32.2	45.6
Total	547.8	538.5	487.9	462.7	647.4	534.3	530.4	217.8	482.7	550.3	517.4	697.7

Source: IDATE / industry data / Ofcom

Figure 1.4

Take-up of communications services, end 2008 (per 100 population)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Fixed lines	54.2	40.9	64.2	40.1	49.5	58.0	46.1	27.0	43.6	37.6	50.7	49.3
Mobile subscriptions	126.0	90.2	129.4	155.8	89.6	65.3	83.1	114.1	114.8	122.3	126.3	128.9
Broadband	28.3	27.5	27.4	19.8	24.9	29.6	23.6	10.1	19.7	36.4	30.1	21.4
Digital TV	87.6	72.3	36.9	62.9	76.0	61.4	64.9	45.3	74.0	53.8	63.1	60.3

Source: IDATE / industry data / Ofcom

2. Television

- The television industry
- The television viewer
- BRIC countries

Figure 2.1

Key television metrics indicators

	UK	FRA	GER	ITA	USA	CAN	JPN
Ads, subscriptions and public funds	£10.5bn	£8.6bn	£10.1bn	£7.4bn	£81.3bn	£3.1bn	£20.3bn
Revs per head	£172	£138	£123	£129	£268	£93	£159
from advertising	*£57*	*£44*	*£39*	*£63*	*£130*	*£51*	*£78*
from subscription	*£71*	*£68*	*£40*	*£44*	*£137*	*£29*	*£54*
from public funding	*£44*	*£26*	*£44*	*£22*	*£1*	*£13*	*£26*
Annual licence fee	£140	£92	£163	£84	n/a	n/a	£134*
Largest TV platform Proportion of homes (%)	DTT 38%	DTT 30%	ACab 47%	ATT 34%	DCab 36%	ACab 32%	ACab 29%
ATT channels	5	7	13	7	5	**6**	7
Viewing per head (mins/day)	225	204	207	234	277	228	n/a
Share of largest channel (%)	22%	27%	13%	22%	7%	8%	18%
Share of three largest channels (%)	44%	58%	38%	53%	21%	19%	52%
DTV penetration	88%	72%	37%	63%	76%	61%	65%
DSO date	2012	2011	2008	2012	2009	2011	2011

Source: IDATE, Ofcom
Note: The Japanese licence fee comes in two parts. This higher fee is payable for those homes where broadcast satellite services are taken.

Figure 2.2

Number of HD channels on offer, by platform and country, end 2008

	UK	FRA	GER	ITA	US	CAN	JAP
Satellite	32	14	4	6	103	60	15
Cable	1	14	0	0	100	50	7
IPTV	0	8	0	0	100	40	4
DTT	0	6	0	0	6	0	9

Source: IDATE
Note: DTT in Japan offers maximum of 9 channels but some regions receive 6, Canada data for September 2009.

Figure 2.3

Number of paying HD subscribers, by platform and country, end 2008 (m)

	UK, FRA, GER, ITA	US	CAN
Satellite	1.5	11.5	0.8
Cable	2.7	9.8	1.4
IPTV	0.8	0.4	0
DTT	0.1	0	0

Source: IDATE
Notes: Paying HD homes only. This does not include households in the US and Japan that receive HD without a charge over the DTT platform

Figure 2.4

Number of households paying for HD, by platform and country, end 2008 (m)

	UK	FRA	GER	ITA	US	CAN
Satellite	0.8	0.5	0.2	0.1	11.5	0.8
Cable	0.5	0	0	0	9.8	1.4
IPTV	0	0.8	0	0	0.4	0
DTT	0	0.1	0	0	0	0
Total	1.3	1.3	0.2	0.1	21.7	2.2

Source: IDATE
Notes: This does not include households in the US and Japan that receive HD without a charge over the DTT platform

Figure 2.5

Global television sector revenue (£bn)

	2004	2005	2006	2007	2008
Global TV revenue	£150.77	£160.05	£173.31	£184.88	£193.70

Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2009-2012, Ofcom and IDATE for US public funding and subscriber revenue.
Notes: Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.848 to the pound, representing the IMF average for 2008.

Figure 2.6

Global television sector revenue: 2004 and 2008

	2004	2008
Advertising	£78.77	£91.09
Subscriptions	£56.23	£84.95
Public funding	£15.77	£17.65

Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2009-2012, Ofcom and IDATE for US public funding and subscriber revenue
Notes: Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of $1.848 to the pound, representing the IMF average for 2008.

Figure 2.7

Comparative analysis of television industry revenue (£bn)

	2003	2004	2005	2006	2007	2008
US	56.9	61.13	64.27	71.09	77.51	81.32
Europe/Canada	41.93	44.2	45.63	47.37	49.66	50.8
Japan	17.37	18.31	19.13	19.72	20.33	20.28

Source: IDATE and Ofcom analysis.
Note: Revenues include advertising, subscriptions and sources of public funding only. Europe includes the European countries in this analysis – UK, France, Germany, Italy, Poland, Spain, the Netherlands, Sweden and the Republic of Ireland. Revenues include advertising, subscriptions and sources of public funding only

Figure 2.8

Revenue analysis among European countries and Canada (£bn)

	2003	2004	2005	2006	2007	2008
UK	8.64	9.21	9.77	9.78	10.27	10.49
FRA	6.65	7.22	7.35	7.49	8.15	8.85
GER	9.39	9.52	9.96	10.04	10.14	10.12
ITA	5.35	6.06	6.49	6.88	7.31	7.48
ESP	3.92	3.88	4.23	4.86	4.9	4.44
CAN	2.47	2.58	2.66	2.88	2.95	3.1
POL	2.18	2.28	1.49	1.6	1.81	2.13
NED	1.78	1.82	1.89	1.9	2.03	2.09
SWE	1.05	1.1	1.19	1.24	1.32	1.35
IRE	0.45	0.5	0.56	0.65	0.7	0.77

Source: IDATE
Note: Revenues include advertising, subscriptions and sources of public funding only

Figure 2.9

TV revenue per head, by source, 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JAP	POL	ESP	NED	SWE	IRL
Advertising	56.95	44.05	39	62.91	130.04	50.6	78.45	23.6	52.1	42.75	41.8	73.72
Subscription	70.88	67.63	40.08	43.77	136.56	29.46	54.48	29.15	36.37	48.12	73.91	73.53
Public funding	44.34	25.93	43.74	21.94	1.06	13.41	26.24	2.46	8.7	33.31	33.17	38.46

Source: IDATE and Ofcom analysis
Note: Figures inside the bars represent industry revenue per head.

Figure 2.10

Changes in components of TV revenues per head, 2007 to 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRE
Subscription	8.27	6.95	1.27	3.17	8.97	2.72	2.99	5.76	0.9	1.63	5.17	9.04
Public funding	2.68	0.17	-1.14	-0.78	1.33	1.24	-3.65	3.02	-6.36	1.3	-1.19	4.97
Advertising	-0.17	2.44	-0.34	0.49	-0.04	-0.2	0.31	-0.61	-6.11	-1.46	-0.91	0.56

Source: IDATE and Ofcom analysis

Figure 2.11

Cost of a TV licence, 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	SWE	NED	IRL
Cost per annum (£)	140	92	163	84	0	0	78	44	0	172	0	127
							56					
Total							134					

Source: Ofcom research (costs have been converted to GBP using 2008 average).
Note: The Japanese licence fee costs £78 in terrestrial households or £134 to receive a larger number of channels via satellite. The green bar represents the difference in cost between a terrestrial licence and a satellite one.

Figure 2.12

Distribution of advertiser expenditure, 2008 (% of expenditure)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Newspapers	28.4	22.7	37.4	18	21.9	29.1	17.7	14.2	23.2	33.5	42.9	51.3
Magazines	11	16.6	15.2	15.1	12.1	10.1	8.7	12.2	8.9	17.6	10.1	2
TV	26.4	28.4	23	49.9	35.1	31	41.1	45.5	43.9	20.1	20	23
Radio	3.1	6.4	4.1	5.3	11.2	12.8	3.3	7.8	9.1	6.5	2.9	9.4
Cinema	1.4	0.6	0.4	0.6	0.4			1.5	0.3	0.1	0.4	0.6
Outdoor	6.5	9.6	4.6	2.5	4.4	4.3	16.9	7.7	5.6	3.8	4.2	12.4
Internet	23.2	15.6	15.3	8.7	14.8	12.7	12.4	11	9.1	18.4	19.4	1.3

Source: World Advertising Trends 2009, published by World Advertising Research Center

Figure 2.13

Changes in patterns of advertiser spend, 2007 to 2008 (percentage points)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Newspapers	-2.9	-0.6	-0.8	-1	-3	-1.7	-1.6	-1.2	-2.1	-1.5	-2.9	-2
Magazines	-0.8	-0.7	-0.6	-0.9	-0.6	-0.6	-0.6	-1	-0.1	-0.9	-0.2	0.1
TV	-0.5	-1.2	-0.6	0.3	1.7	-0.4	0.2	-1.1	0.5	0.4	0.5	0
Radio	-0.2	-0.2	-0.2	0.2	-0.4	0.1	-0.1	-0.1	0.6	0.2	0	0.8
Cinema	0.1	-0.1	-0.2	-0.1	0	0	0	0.4	-0.2	0	0	-0.1
Outdoor	0	0.2	-0.1	0	0.1	0.2	-0.1	0.1	-1.5	0	-0.1	1.3
Internet	4.3	2.5	2.5	1.6	2.3	2.4	2.3	2.9	2.8	1.8	2.6	-0.1

Source: World Advertising Trends 2009, published by World Advertising Research Center

Figure 2.14

Latest reported revenues from major free-to-view TV operators, 2008 (£bn)

	RTL	NHK	BBC	Mediaset	P7S1	France Televisions	Fuji	RAI	TF1	ITV
Revenue	4.6	3.5	2.6	2.6	2.4	2.2	2.2	2.1	2.1	2.0

Source: IDATE and latest available annual reports
Notes: Comparisons between operators should be regarded as indicative only due to the possibility of differences in financial reporting between operators. RTL figures include revenues from broadcasting related activities in countries part of this study (Germany, France, UK and Netherlands). RAI figures include licence fee which combines TV and radio.

Figure 2.15

Latest reported subscription revenues for a range of pay-TV operators, 2008

	Comcast	DirecTV	Dish	Time Warner Cable	BSkyB	Canal+	Sky Italia	Virgin Media	Kabel Deutschland	Sky Deutschland
Revenue (£bn)	11	9.4	6.3	6.2	4.3	3.6	3	2.7	0.9	0.6
YOY change (%)	6	11.5	4.8	3.5	6.6	4.4	21.9	-4	5.4	-0.8

Source; Latest available company full-year results.
Notes: Revenues have been converted to GBP using 2008 average exchange rates. Where possible we have reported revenues related to the TV services only (including advertising). Comcast includes video and advertising revenues; Time Warner Cable includes video and advertising revenues; BSkyB include retail, wholesale and advertising revenues; KDG includes cable access and TV/radio revenues; Virgin Media includes consumer and content revenues; Sky Italia revenue based on IDATE's estimate from News Corporation's annual report; Sky Deutschland was formerly known as Premiere.

Figure 2.16

Latest reported ARPU for selected pay TV operators (£)

	Comcast	Time Warner Cable	DirecTV	Virgin Media	BSkyB	Dish	Sky Italia	Sky Deutschland
Annual ARPU	714	666	545	508	464	450	420	228

Source: Latest available company reports
Notes: ARPU is average revenue per user. Revenues have been converted to GBP using 2008 average exchange rates. Comparisons are for indicative purposes only as definitions of ARPU may differ and some operators include telecommunications revenue in annual ARPU.

Figure 2.17

PSB network output by genre, 2008 (%)

	UK	FRA	GER	ITA	POL	ESP	NED	SWE	IRL
Factual	27%	14%	19%	19%	10%	15%	32%	32%	3%
Fiction	25%	17%	30%	20%	51%	27%	21%	22%	54%
Entertainment	13%	18%	10%	20%	13%	14%	9%	13%	9%
News	14%	8%	9%	13%	6%	20%	23%	8%	11%
Sports	8%	4%	8%	6%	5%	16%	11%	11%	7%
Education	4%	0%	0%	2%	2%	2%	0%	0%	0%
Arts and music	3%	22%	13%	16%	9%	6%	5%	9%	1%
Other	7%	17%	11%	3%	4%	1%	0%	5%	14%

Source: Ofcom / EBU Members
Note: The UK figures include BBC One, BBC Two, ITV1, Channel 4, Five and S4C digital

Figure 2.18

First run originations, acquisitions and repeats, 2008 (%)

	UK	FRA	GER	ITA	POL	ESP	SWE	IRL	Average
First run Originations	51%	50%	53%	62%	31%	55%	31%	23%	47%
First run Acquired	5%	23%	13%	16%	21%	11%	17%	31%	15%
Repeats	45%	26%	34%	22%	48%	34%	52%	46%	38%

Source: EBU members/Ofcom
Note: The ‘average’ figures represent a weighted average of the data illustrated in the chart.

Figure 2.19

First-run origination trends (proportion of total hours, %)

	2003	2004	2005	2006	2007	2008
ITA	56.70%	55.94%	52.90%	60.65%	63.11%	61.75%
ESP	61.41%	63.14%	63.47%	63.86%	60.24%	55.34%
GER	54.79%	55.15%	53.92%	55.09%	53.76%	53.43%
UK	58.78%	54.09%	54.03%	53.29%	53.35%	50.55%
FRA	49.48%	52.21%	44.76%	50.43%	50.55%	50.34%
POL	39.83%	39.92%	41.02%	36.44%	33.20%	30.95%
SWE	43.34%	39.33%	36.39%	35.87%	30.78%	30.51%
IRL	21.48%	24.46%	21.96%	23.69%	22.90%	23.09%

Source: Ofcom/EBU members
Note: The UK figures include BBC One, BBC Two, ITV1, Channel 4 and S4C digital.

Figure 2.20

Acquisition trends (proportion of output, %)

	2003	2004	2005	2006	2007	2008
IRL	52.8%	47.7%	46.4%	38.6%	30.4%	30.7%
FRA	31.7%	30.7%	28.9%	23.8%	23.2%	23.2%
POL	23.5%	21.1%	21.5%	23.8%	21.6%	21.0%
SWE	18.3%	19.8%	19.7%	19.0%	18.6%	17.4%
ITA	17.5%	19.7%	21.5%	15.8%	15.2%	16.0%
GER	9.6%	8.8%	7.9%	8.4%	9.1%	12.8%
ESP	29.6%	27.7%	27.6%	25.3%	15.2%	10.9%
UK	6.7%	7.0%	6.9%	7.8%	5.3%	4.7%

Source: Ofcom/EBU members
Note: The UK figures include BBC One, BBC Two, ITV1, Channel 4 and S4C digital.

Figure 2.21

Repeat trends (proportion of output, %)

	2003	2004	2005	2006	2007	2008
SWE	38.2%	40.9%	43.9%	45.1%	50.6%	52.1%
POL	36.7%	39.0%	37.5%	39.8%	45.2%	48.0%
IRL	25.7%	27.8%	31.7%	37.7%	46.7%	46.2%
UK	34.5%	38.1%	39.1%	38.9%	41.3%	44.8%
GER	35.6%	36.0%	38.2%	36.5%	37.1%	33.8%
ESP	9.0%	9.1%	9.0%	10.8%	24.5%	33.8%
FRA	18.8%	17.1%	26.4%	25.8%	26.3%	26.4%
ITA	25.8%	24.3%	25.6%	23.5%	21.7%	22.3%

Source: Ofcom / EBU members
Note: The UK figures include BBC One, BBC Two, ITV1, Channel 4 and S4C digital.

2. Television

- The television industry
- The television viewer
- BRIC countries

Figure 2.22

TV reception devices connected to the main set in the home, 2008 (% of homes)

	UK	FRA	GER	ITA	USA	CAN	JAP	POL	ESP	NED	SWE	IRL
Analogue terrestrial	12%	17%	0%	34%	3%	5%	5%	20%	20%	0%	0%	19%
Digital terrestrial	38%	30%	4%	30%	10%	2.42%	19%	0%	45%	10%	21%	0%
Analogue satellite	0%	3%	16%	3%	0%	1%	1%	0%	3%	0%	0%	1%
Digital satellite	36%	21%	20%	31%	28%	25%	26%	41%	17%	13%	16%	42%
Analogue cable	1%	8%	47%	0%	21%	32%	29%	34%	3%	46%	37%	20%
Digital cable	13%	7%	11%	0%	36%	32%	19%	3%	7%	28%	16%	16%
IPTV	0%	14%	1%	2%	3%	2%	1%	1%	5%	3%	10%	3%

Source: World Television Markets 2008, IDATE

Figure 2.23

TV reception devices connected to the main set in the home, 2008

	UK	FRA	GER	ITA	USA	CAN	JAP	POL	ESP	NED	SWE	IRL
Terrestrial	50%	48%	4%	63%	13%	8%	24%	20%	65%	10%	21%	19%
Satellite	36%	23%	37%	34%	28%	27%	27%	41%	20%	13%	16%	43%
Cable	14%	15%	58%	0%	57%	64%	48%	38%	10%	74%	53%	36%

Source: World Television Markets 2008, IDATE

Figure 2.24

Changes in platform take-up, 2007 to 2008 (percentage points)

		UK	FRA	GER	ITA	US	CAN	JPN	POL	ESP	NED	SWE	IRL
Terrestrial	*Analogue*	-3.2	-6.1	-0.2	-7.2	-2.0	-0.2	-2.5	-12.9	-18.1	0.0	0.0	-0.4
	Digital	1.2	3.7	0.0	5.9	1.6	0.8	1.3	0.0	16.9	3.3	0.3	0.0
Satellite	*Analogue*	0.0	-1.0	-1.4	-0.9	-0.1	-2.9	-0.8	0.0	-0.4	0.0	-1.2	-1.0
	Digital	1.3	0.9	1.1	1.5	0.6	2.1	-0.6	12.0	0.1	1.8	-0.7	3.7
Cable	*Analogue*	-0.3	-1.3	-3.1	0.0	-4.1	-5.1	-3.0	-0.8	0.1	-10.7	-2.5	-4.4
	Digital	0.8	1.1	2.6	0.0	2.8	4.6	5.3	1.3	0.5	5.3	1.9	0.0
IPTV		0.1	2.7	1.0	0.7	1.3	0.7	0.4	0.4	0.9	0.3	2.2	2.0

Source: World Television Markets 2008, IDATE

Figure 2.25

Proportion of analogue main sets converted to digital , 2006/07 to 2007/08 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2006/07	7.4	10.9	8.5	8.4	8.6	7.1	8.6	11.8	12.3	19.7	8.5	7.8
2007/08	3.4	8.4	4.7	8.1	6.2	6.8	6.4	13.7	18.4	10.7	3.8	5.7

Source: World Television Markets 2008 (IDATE) and CRTC

Figure 2.26

Analogue and digital television households, 2008 (% of households)

	UK	FRA	GER	ITA	USA	CAN	JAP	POL	ESP	NED	SWE	IRL
Digital	87.6	72.3	36.9	62.9	76.0	61.4	64.9	45.3	74.0	53.8	63.1	60.3
Analogue	12.4	27.7	63.1	37.1	24.0	38.6	35.1	54.7	26.0	46.2	36.9	39.7

Source: World Television markets 2008 (IDATE)

Figure 2.27

Timeline for DSO

	Switchover completion
Netherlands	2006
Sweden	2007
Germany	2008
USA	2009
Spain	2010
Canada	2011
Japan	2011
France	2011
Italy	2012
UK	2012
Ireland	2012
Poland	2013

Source: Ofcom

Figure 2.28

DTT devices connected to the main set in the home (%)

Years since launch	1	2	3	4	5	6	7	8	9	10
UK	2	4	4.90	4.97	11.44	18.58	25.54	30.83	37.07	38.27
FRA	3.72	18.99	26.47	30.16						
GER	0.59	1.52	2.66	3.45	4.52	4.48				
ITA	5.67	15.18	19.08	23.91	29.81					
USA	0.47	0.55	1.37	3.63	5.38	8.20	9.76			
JPN	1.00	6.67	10.41	13.51	17.86	19.15				
ESP	1	1.03	1.09	0.95	0.93	8.48	19.16	28.51	45.46	
NED	0.17	1.04	3.33	3.78	7.03	10.32				
SWE	1	2.28	3.26	4.65	9.41	16.87	21.79	20.25	20.55	

Source: IDATE

Figure 2.29

Migration to pay-TV, 2007 and 2008 (% of households)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2007	2.13	1.89	-2.57	2.03	1.14	1.15	3.10	13.80	1.16	0.13	5.02	3.80
2008	2.00	2.17	-0.59	1.75	0.45	0.64	2.68	12.40	1.08	-0.54	0.10	0.66

Source: World Television Markets 2008 (IDATE)

Figure 2.30

Pay versus free-to-view television, 2008 (% of households)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Free	50.8	44.6	35.5	77.1	13.1	12.2	43.5	21.8	72.1	1.1	5.6	23.4
Pay	49.2	55.4	64.5	22.9	86.9	87.8	56.5	78.2	27.9	98.9	94.4	76.6

Source: World Television Markets 2008 (IDATE)

Figure 2.31

Daily minutes of viewing per head

	UK	FRA	GER	ITA	USA	CAN	POL	ESP	NED	SWE	IRL
2007	218	207	208	230	272	230	241	223	186	157	181
2008	225	204	207	234	277	228	232	227	184	160	186
Proportionate change 2007 to 2008	3.2%	-1.4%	-0.5%	1.7%	1.8%	-0.9%	-3.7%	1.8%	-1.1%	1.9%	2.8%

Source: One Television Year in the World 2009 Eurodata / Mediametrie, based on national audience measurement systems.

Figure 2.32

Collective audience share of top one, three and five channels: all households, 2008

	Avg	UK	FRA	GER	ITA	USA	CAN	POL	ESP	NED	SWE	IRL
Top channel	0.189364	0.218	0.272	0.134	0.218	0.07	0.081	0.228	0.181	0.211	0.201	0.251
Second and third channels	0.254091	0.262	0.308	0.248	0.311	0.136	0.105	0.322	0.329	0.236	0.298	0.229
Fourth and fifth channels	0.139091	0.125	0.143	0.169	0.197	0.091	0.073	0.21	0.141	0.138	0.167	0.098
Total	0.582545	0.605	0.723	0.551	0.726	0.297	0.26	0.76	0.651	0.585	0.666	0.578

Source: One Television year in the World 2009, Eurodata / Mediametrie, based on national audience measurement systems
Note: The pink increment represents the additional share added from the second and third most popular channels. The purple increment represents the additional share added by the fourth and fifth channels

Figure 2.33

PSB share of viewing, all households (%)

	Avg	UK	FRA	GER	ITA	USA	CAN	POL	ESP	NED	SWE	IRL
2007	0.375	0.391	0.369	0.407	0.418	0.017	0.04	0.461	0.311	0.313	0.315	0.398
2008	0.370	0.371	0.364	0.406	0.415	0.014	0.044	0.439	0.3	0.349	0.298	0.391

Source: One Television Year in the World 2009 Eurodata/Mediametrie, based on national audience measurement systems
Notes: UK figures include BBC One, BBC Two and Channel 4/S4C
Average calculated using European channels.

Figure 2.34

Terrestrial channels versus multichannel viewing shares (%)

	UK		FRA		GER		ITA		USA	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
Terrestrial	0.634	0.605	0.825	0.779	0.683	0.683	0.854	0.84	0.295	0.28
Multichannel	0.366	0.395	0.175	0.221	0.317	0.317	0.146	0.16	0.705	0.72

Source: One Television Year in the World 2009 Eurodata / Mediametrie and Ofcom based on national audience 9easurement systems

2. Television

- The television industry
- The television viewer
- BRIC countries

Figure 2.35

Television industry revenue, 2003 to 2008 (£bn)

	2003	2004	2005	2006	2007	2008
UK	8.6	9.2	9.8	9.8	10.3	10.5
BRA	3.1	3.7	4.4	4.8	5.6	7.0
RUS	1.0	1.2	1.4	2.0	2.7	3.6
IND	1.8	2.3	2.6	2.9	3.2	3.8
CHN	4.0	4.5	5.1	5.5	6.1	6.9

Source: IDATE/Ofcom analysis

Figure 2.36

Television industry revenue per head: 2003 and 2008 (£)

	BRA			RUS			IND			CHN	
	2003	2008		2003	2008		2003	2008		2003	2008
Revenue per head (£)	17	37		7	25		2	3		3	5

Source: IDATE / industry data / Ofcom

Figure 2.37

Television industry revenue by source, 2003 and 2008 (£bn)

	BRA		RUS		IND		CHN		UK	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Subscription fees	1	2.9	0.1	0.5	1.3	2.3	2	2.8	3.1	4.3
Public funding	0	0.1	0	0	0	0	0	0	2.3	2.6
Advertising revenues	2	4.1	0.8	3.1	0.5	1.5	2.1	4.1	3.2	3.5

Source: IDATE / industry data / Ofcom

Figure 2.38

TV households, 2003 to 2008 (m)

	2003	2004	2005	2006	2007	2008
BRA	44.0	45.3	46.2	48.8	50.3	51.8
RUS	50.1	50.3	50.4	50.5	50.6	50.6
CHN	330.1	338.0	341.0	354.6	368.8	383.6
IND	96.0	103.0	110.0	116.0	122.0	129.0
UK	25.5	25.6	25.7	25.8	25.9	25.9

Source: IDATE / industry data / Ofcom

Figure 2.39

Reception devices connected to the main television set, 2008 (% of homes)

	BRA	RUS	IND	CHN	UK
Analogue terrestrial	87%	53%	21%	49%	12%
Digital terrestrial	0%	0%	0%	0%	38%
Analogue satellite	1%	0%	5%	6%	0%
Digital satellite	4%	15%	9%	2%	36%
Analogue cable	6%	26%	63%	30%	1%
Digital cable	2%	4%	2%	12%	13%
ADSL TV	0%	0%	0%	1%	0%

Source: IDATE / industry data / Ofcom

Figure 2.40

Proportion of households with FTA versus pay television, 2003 and 2008 (% of homes)

	BRA			RUS			IND			CHN			UK	
	2003	2008		2003	2008		2003	2008		2003	2008		2003	2008
Free	91.8	87.8		89.9	58.6		53.1	26.9		66.7	57.5		60.1	50.8
Pay	8.2	12.2		10.1	41.4		46.9	73.1		33.3	42.5		39.9	49.2

Source: IDATE / industry data / Ofcom

Figure 2.41

Proportion of households connected to digital and analogue platforms, 2003 and 2008 (%)

	BRA		RUS		IND		CHI		UK	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Digital	2.8	6.8	0.5	20.1	0.0	10.9	0.1	14.5	48.4	87.6
Analogue	97.2	93.2	99.5	79.9	100.0	89.1	99.9	85.5	51.6	12.4

Source: IDATE / industry data / Ofcom

3. Radio

- Market overview
- The radio industry
- The radio listener
- BRIC countries

Figure 3.1

Key radio market indicators, 2008

	UK	FRA	GER	ITA	USA	CAN	JPN
Total industry revenue	£1.3bn	£1.2bn	£2.6bn	£1.1bn	£11.1bn	£1.0bn	£2.0bn
Revenues per capita	£21	£18	£31	£18	£36	£31	£16
% public funding	59%	60%	81%	54%	0.5%	16%	59%
Number of licensed stations	386	880	350	273	14,253	1,213	342
Number of digital stations	423	113	116	65	2,100	304	10
Listening hours per head per week	20.1	20.9	20.5	20.9	18.5	18.3	12.6
Public radio listening share	56%	21%	58%	28%	5%	13%	8%

Source: Ofcom / IDATE
Note: Digital stations also includes trial stations in countries where no full service has yet to be launched.

3. Radio

- Market overview
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Figure 3.2

Global radio industry revenues, 2003 to 2008 (£bn)

	2003	2004	2005	2006	2007	2008
Commercial revenue	16.4	17.6	18.0	18.6	18.7	17.6
Public Funding	5.9	6.6	6.8	6.9	7.1	7.2
Subscription revenues	0.1	0.2	0.5	1.0	1.4	1.8
Total	22.2	24.3	25.4	26.5	27.2	26.6

*Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2009-2013. *Additional public radio data added by Ofcom based on annual reporting for Canadian Radio-television Telecommunications Commission (CRTC) in Canada and the Corporation for Public Broadcasting (CPB) in the USA.*
Note: Ofcom has used an exchange rate of $1.848 to the pound. Interpretation of data is solely Ofcom's responsibility.

3. Radio

- Market overview
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Figure 3.8

Number of local and national radio stations per country

	UK	FRA	GER	ITA	USA	CAN	JPN
Number of stations	6.4	13.7	4.2	4.7	46.9	37.2	2.9

Source: IDATE, Ofcom, 2008/09.

Figure 3.9

Radio stations available over Digital radio platforms

	UK	FRA	GER	ITA	USA	CAN	JPN
Public	43	8	45	24	0	18	3
Private	380	105	71	41	2100	286	7
Total	423	113	116	65	2100	304	10

Source: IDATE, Ofcom, 2008/09.
Note: Excludes internet-only stations

Figure 3.10

Weekly listening hours per person, 2008

	UK	FRA	GER	ITA	USA	CAN	JPN
Weekly hours	20.1	20.9	20.5	20.9	18.5	18.3	12.6

Source: Ofcom, IDATE, 2008.

Figure 3.11

PSB radio share of listening, 2008

	UK	FRA	GER	ITA	US	CAN	JPN
PSB	55.7	21.9	58.2	28.2	5.2	12.6	7.95
Commercial	44.3	78.1	41.8	71.8	94.8	87.4	92.05

Source: Ofcom, IDATE, 2008.

3. Radio

- Market overview
- The radio industry
- The radio listener
- BRIC countries

Figure 3.12

Radio industry revenue, 2004 to 2008 (£m)

	BRA	RUS	IND	CHN	UK
2004	88	157	30	256	30
2008	186	305	103	583	28

Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2009-2013
Note: Ofcom has used an exchange rate of $1.848 to the pound. Interpretation of data is solely Ofcom's responsibility.

Figure 3.13

Radio industry revenue per capita, 2008 (£)

	BRA	RUS	IND	CHN	UK
2008	0.99	2.15	0.09	0.44	21

Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2009-2013
Note: Ofcom has used an exchange rate of $1.848 to the pound. Interpretation of data is solely Ofcom's responsibility.

4. Telecoms

- Overview
- Fixed voice services
- Mobile voice and data services
- Broadband services
- BRIC countries

Figure 4.1

Key indicators, 2008

	UK	FRA	GER	ITA	USA	CAN	JPN
Telecoms service revenues	£27.8bn	£29.1bn	£34.3bn	£23.3bn	£144.2bn	£15.7bn	£58.6bn
Telecoms revenues per capita	£456	£453	£416	£401	£475	£474	£460
Fixed lines per 100 population	54.2	40.9	64.2	40.1	49.5	58.0	46.1
Monthly outbound fixed-line minutes per capita	190	139	166	114	195	183	62
Mobile connections per 100 population	126.0	90.2	129.4	155.8	89.6	65.3	83.1
Share of mobile post-pay connections	39%	68%	43%	12%	82%	78%	98%
3G connections per 100 population	29.4	17.8	14.0	49.8	26.4	5.3	68.8
Monthly outbound mobile minutes per capita	152	132	85	140	603*	300*	86
Broadband connections per 100 households	67.1	63.9	56.2	46.6	63.7	74.6	60.5
DSL as % of broadband connections	78.5	95.0	92.5	96.6	39.9	43.3	38.5

Sources: IDate / operators / national regulators
Notes: USA and Canada mobile use includes both outbound and inbound calls; 3G includes W-CDMA and CDMA20000 1xEV-DO. It does not include CDMA2000

Figure 4.2

Total telecoms service retail revenue, by sector: 2003 to 2008 (£bn)

	2003	2004	2005	2006	2007	2008
Fixed	160.69	152.01	145.77	137.70	128.46	118.68
Mobile	153.00	169.67	181.03	191.73	203.28	209.60
Broadband	15.53	21.93	28.65	35.98	42.74	45.96
Total	329.22	343.61	355.46	365.41	374.48	374.24

Source: IDATE / industry data / Ofcom
Note: Excludes revenue from narrowband internet and corporate data services; covers only the 12 countries in the analysis; figures have been restated to reflect more accurate data

Figure 4.3

Telecoms service retail revenue, by sector: 2008 (£bn)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Fixed	9.19	9.39	12.41	7.83	46.31	5.98	16.21	1.57	5.41	2.06	1.35	0.97
Mobile	15.37	15.89	17.87	12.49	80.43	7.39	36.28	4.67	11.90	4.38	1.68	1.24
Broadband	3.24	3.83	4.02	2.97	17.43	2.36	6.12	0.87	2.59	1.65	0.69	0.20
Total	27.80	29.11	34.30	23.29	144.17	15.73	58.61	7.11	19.90	8.10	3.72	2.40

Source: IDATE / industry data / Ofcom
Note: Total service revenue excludes revenue from narrowband internet and corporate data services.

Figure 4.4

Telecoms service retail revenues, by sector 2003 and 2008 (£bn)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Fixed	11.26	9.19	11.89	9.39	16.28	12.41	10.02	7.83	67.37	46.31	6.79	5.98	21.79	16.21
Mobile	9.71	15.37	10.97	15.89	16.96	17.87	10.01	12.49	47.42	80.43	3.70	7.39	37.85	36.28
Broadband	0.78	3.24	1.16	3.83	1.57	4.02	0.88	2.97	6.19	17.43	1.19	2.36	1.96	6.12
	21.76	27.80	24.02	29.11	34.82	34.30	20.92	23.29	120.98	144.17	11.68	15.73	61.60	58.61

Source: IDATE / industry data / Ofcom
Note: Total service revenue excludes revenue from narrowband internet and corporate data services

Figure 4.5

Total telecoms service retail revenue per head: 2003 to 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN
2003	362.03	385.25	422.53	360.63	416.68	366.27	483.69
2004	397.86	401.65	444.64	387.25	429.66	389.11	478.94
2005	417.32	418.83	442.69	398.11	444.82	409.26	479.88
2006	429.62	427.22	438.09	404.61	459.74	428.67	486.41
2007	453.27	443.19	429.60	410.76	473.37	454.02	482.39
2008	456.20	452.71	416.41	400.60	474.51	473.52	459.92

Source: IDATE / industry data / Ofcom
Note: Total telecoms service revenue excludes revenue from narrowband internet and corporate data services

Figure 4.6

Take-up of fixed and mobile services: 2003 and 2008 (per cent)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	Fixed	Mobile	Fixed	Mobile	Fixed	Mobile	Fixed	Mobile	Fixed	Mobile	Fixed	Mobile	Fixed	Mobile
2003		87.98		66.85		78.63		97.66		53.47		41.68		62.65
Growth 2003-2008		38.02		23.34		50.72		58.11		36.13		23.62		20.40
2008	54.23	125.99	40.90	90.19	64.17	129.35	40.11	155.77	49.50	89.60	58.00	65.30	46.11	83.05
Fall 2003 to 2008	3.85		13.49		1.77		11.51		13.51		2.08		9.37	
	58.07		54.38		65.95		51.63		63.01		60.09		55.48	

Source: IDATE / industry data / Ofcom

Figure 4.7

Mobile as a proportion of total fixed and mobile revenues: 2003 and 2008 (per cent)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	46.32	47.97	51.03	49.96	41.31	35.26	63.47	50.66	53.12	55.39	41.68	48.45
2008	62.58	62.85	59.01	61.48	63.46	55.29	69.12	74.77	68.74	67.99	55.53	56.18

Source: IDATE / industry data / Ofcom

Figure 4.8

Monthly fixed and mobile call volumes per head: 2003 and 2008 (minutes)

	UK		FRA		GER		ITA		JPN		USA		CAN	
	2003	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**
Fixed	231.52	190.00	145.58	138.76	197.21	165.92	146.56	114.38	130.11	61.76	333.20	194.75	149.45	183.20
Mobile	81.71	151.71	86.23	131.95	37.51	84.99	74.10	139.55	76.03	85.74	243.96	603.42	128.79	299.99
	313.22	341.71	231.82	270.72	234.72	250.91	220.66	253.92	206.14	147.50	577.17	798.17	278.24	483.19

Source: IDATE / industry data / Ofcom
Note: Local and VoIP calls are excluded for the US and Canada

Figure 4.9

Mobile voice call volumes as a proportion of total voice call volumes: 2003 and 2008 (%)

	UK	FRA	GER	ITA	JPN	POL	ESP	NED	SWE	IRL		USA
2003	26.09	37.20	15.98	33.58	36.88	27.04	29.58		16.74	31.64		42.27
2008	44.40	48.74	33.87	54.96	58.13	58.56	49.08	61.28	42.29	55.08		75.60

Source: IDATE / industry data / Ofcom
Note: USA and CAN Include incoming mobile calls

Figure 4.10

Mobile as a proportion of total telecoms connections: 2003 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	60.24	55.14	54.39	65.42	45.91	40.96	53.03	57.93	64.31	57.17	57.49	63.96
2008	69.91	68.80	66.84	79.52	64.41	52.96	64.30	80.85	72.49	76.51	71.34	72.32

Source: IDATE / industry data / Ofcom

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Figure 4.11

Fixed-line voice retail revenues: 2003 and 2008 (£bn)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	11.26	11.89	16.28	10.02	67.37	6.79	21.79	2.73	6.19	3.35	1.92	1.10
2008	9.19	9.39	12.41	7.83	46.31	5.98	16.21	1.57	5.41	2.06	1.35	0.97

Source: IDATE / industry data / Ofcom
Note: Excludes revenue from narrowband internet and corporate data services

Figure 4.12

Fixed-line voice retail revenue per head: 2003 and 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	187.37	190.73	197.59	172.84	232.03	212.85	171.09	70.82	146.13	203.66	213.96	279.68
2008	150.84	146.02	150.69	134.65	152.42	179.94	127.21	40.90	118.35	122.33	148.98	232.66

Source: IDATE / industry data / Ofcom
Note: Excludes revenue from narrowband internet and corporate data services

Figure 4.13

Fixed-line voice call volumes: 2003 and 2008 (billions of minutes)

	UK	FRA	GER	ITA	USA	JPN	POL	ESP	NED	SWE	IRL
2003	166.96	108.93	195.00	102.00	1,160.92	198.85	27.31	73.68		33.51	9.30
2008	138.95	107.08	164.00	79.81	710.03	94.44	26.77	73.76	24.70	24.67	9.13

Source: IDATE / industry data / Ofcom

Figure 4.14

Monthly fixed-line voice call minutes per head: 2003 to 2008

	2003	2004	2005	2006	2007	2008
UK	231.52	225.81	219.78	204.56	200.89	190.00
FRA	145.58	139.64	140.03	138.56	137.17	138.76
GER	197.21	196.14	183.99	176.93	170.91	165.92
ITA	146.56	142.10	134.82	129.36	122.08	114.38
USA	333.20	323.15	289.29	258.82	223.99	194.75
JPN	130.11	104.91	88.95	78.22	68.62	61.76

Source: IDATE / industry data / Ofcom
Note: Data for the UK and US excludes VoIP calls

Figure 4.15

Incumbent share of fixed voice call volumes: 2003 and 2008

	UK	FRA	GER	ITA	USA	JPN	POL	ESP	NED	SWE	IRL
2003	68.86	71.50	66.00	68.00	41.40	69.92	88.20	81.30	78.00	56.20	79.00
2008	46.66	53.00	34.72	61.00		67.52	65.20	64.50	59.00	55.00	51.00

Source: IDATE / industry data / Ofcom

Figure 4.16

Fixed exchange lines: 2003 and 2008 (m)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	34.90	33.91	54.34	29.94	182.93	19.16	70.66	12.58	20.82	10.10	6.51	1.93
2008	33.05	26.30	52.86	23.32	150.39	19.26	58.76	10.40	19.92	6.34	4.59	2.05

Source: IDATE / industry data / Ofcom

Figure 4.17

Monthly outbound minutes per fixed line: 2003 and 2008

	UK	FRA	GER	ITA	USA	JPN	POL	ESP	NED	SWE	IRL
2003	396.82	266.87	300.59	290.45	519.87	232.08	182.21	297.49		426.20	400.39
2008	349.10	324.20	255.60	270.60	383.21	133.20	214.15	307.26	308.39	401.54	364.93

Source: IDATE / industry data / Ofcom

Figure 4.18

Average monthly revenue per fixed line: 2003 and 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	26.76	29.13	25.10	28.55	30.17	29.51	25.43	18.24	24.98	27.58	24.41	47.24
2008	23.10	28.43	19.34	26.55	24.99	25.86	22.86	12.59	22.54	25.77	21.93	38.67

Source: IDATE / industry data / Ofcom

Figure 4.19

Average fixed-line revenue, per minute: 2003 to 2008 (pence)

	UK	FRA	GER	ITA	USA	JPN	POL	ESP	NED	SWE	IRL
2003	6.74	10.92	8.35	9.83	5.80	10.96	10.01	8.40		5.73	11.80
2008	6.62	8.77	7.57	9.81	6.52	17.16	5.88	7.34	8.36	5.46	10.60

Source: IDATE / industry data / Ofcom

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Figure 4.20

Mobile availability, by technology: 2008 (% of population)

	UK	FRA	GER	ITA	USA	CAN
2G	100	99	99	100	98	98
3G	93	77	85	93	88	91
HSPA	91	77	84.6	92	40	0

Source: IDATE
Note: No data are available for HSPA in Canada. CDMA 2000 EV-DO standards are available alongside HSPA in the USA and Canada.

Figure 4.21

Mobile revenues: 2003 and 2008 (£bn)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	9.71	10.97	16.96	10.01	47.42	3.70	37.85	2.81	7.01	4.16	1.37	1.03
2008	15.37	15.89	17.87	12.49	80.43	7.39	36.28	4.67	11.90	4.38	1.68	1.24

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.22

Mobile revenue, by service type: 2003 and 2008 (£bn)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	2003	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**	**2003**	**2008**
Voice	7.95	11.50	10.02	12.91	14.25	14.04	8.36	8.83	44.81	62.10	3.42	5.87	29.15	22.31
Data	1.77	3.87	0.95	2.98	2.71	3.83	1.65	3.66	2.61	18.34	0.28	1.52	8.71	13.97
Total	9.71	15.37	10.97	15.89	16.96	17.87	10.01	12.49	47.42	80.43	3.70	7.39	37.85	36.28

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.23

Data as a proportion of total mobile service revenue: 2003 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	18.18	8.64	16.00	16.49	5.50	7.53	23.00	13.20	14.62	13.00	11.20	18.83
2008	25.17	18.74	21.43	29.30	22.80	20.56	38.50	22.00	19.09	24.00	18.84	24.61

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.24

Non-SMS data as a proportion of total mobile data revenues: 2003 and 2008 (%)

	UK	FRA	GER	ITA	CAN	JPN	POL	ESP	SWE
2003	6.85	10.00	6.45	27.82		81.06	4.19	3.87	1.06
2008	23.78	31.92	21.89	40.22	73.13	100.00	7.64	38.84	43.92

Source: IDATE / industry data / Ofcom

Figure 4.25

Mobile revenue, per head: 2003 and 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	162	176	206	173	163	116	297	73	166	253	153	263
2008	252	247	217	215	265	223	285	121	260	260	186	298

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.26

Mobile voice call volumes: 2003 and 2008 (billions of minutes)

	UK	FRA	GER	ITA	JPN	POL	ESP	NED	SWE	IRL		USA	CAN
2003	58.92	64.52	37.09	51.57	116.19	10.12	30.94	15.46	6.74	4.31		850.00	49.28
2008	110.95	101.82	84.01	97.37	131.10	37.83	71.11	39.10	18.08	11.19		2,200.00	119.56

Source: IDATE / industry data / Ofcom
Note: USA and Canada include incoming calls

Figure 4.27

Mobile messaging volumes: 2003 and 2008 (billions of messages)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
SMS	22.21	83.22	8.19	34.40	19.00	29.10	20.76	-	24.96	830.00	0.35	20.91	-	-
MMS	0.03	0.47	-	0.37	0.03	0.18	-	-	-	9.46	-	-	-	-
Total	22.23	83.70	8.19	34.77	19.03	29.28	20.76	-	24.96	839.46	0.35	20.91	-	-

Source: IDATE / industry data / Ofcom

Figure 4.28

Mobile subscriptions: 2003 and 2008 (m)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	52.87	41.68	64.79	56.64	155.26	13.29	79.79	17.32	37.51	13.48	8.80	3.42
2008	76.79	58.00	106.55	90.57	272.23	21.69	105.83	43.93	52.49	20.63	11.42	5.36

Source: IDATE / industry data / Ofcom

Figure 4.29

Mobile subscriptions, by type: 2003 and 2008 (m)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Contract	17.29	29.91	24.55	39.26	31.49	46.24	5.31	10.60	142.68	224.12	10.14	16.87	77.18	104.24
Pre-pay	35.58	46.88	17.13	18.73	33.30	60.31	51.34	79.98	12.58	48.11	3.15	4.82	2.61	1.59
	52.87	76.79	41.68	58.00	64.79	106.55	56.64	90.57	155.26	272.23	13.29	21.69	79.79	105.83

Source: IDATE / industry data / Ofcom

Figure 4.30

MVNO share of total mobile subscriptions, 2005 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2005	11.61	0.60	25.20	0.00	6.40	1.19	0.00	0.00	0.00	15.00	2.13	0.00
2008	12.65	5.05	25.53	0.74	7.70	3.48	0.02	0.46	2.85	5.60	0.88	0.00

Source: IDATE / industry data / Ofcom
Note: UK and Germany figures includes reseller's subscriptions in addition to full MVNOs

Figure 4.31

Herfindahl-Herschman index of mobile subscription concentration: 2003 and 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	1,708.00	3,879.28	3,335.96	3,733.89	1,376.00	2,680.67	4,182.14	3,343.73	3,888.03	2,569.34	3,762.13	4,621.16
2008	1,613.71	3,346.81	2,733.44	2,922.41	1,926.49	2,936.06	3,810.13	3,040.79	3,484.96	3,187.53	3,321.86	3,176.93

Source: IDATE / industry data / Ofcom

Figure 4.32

3G as a proportion of total mobile subscriptions: 2005 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2005	7.01	3.07	3.03	15.05	2.98	0.15	31.82	0.01	1.89	1.42	6.09	5.52
2008	23.37	19.72	10.79	32.00	29.48	8.06	82.83	11.00	41.83	18.00	31.08	25.16

Source: IDATE / industry data / Ofcom
Note: 3G includes W-CDMA and CDMA20000 1xEV-DO and does not include CDMA2000

Figure 4.33

Monthly outbound minutes per mobile subscription: 2003 and 2008

	UK	FRA	GER	ITA	JPN	POL	ESP	NED	SWE	IRL		USA	CAN
2003	95.89	133.97	49.86	77.48	126.32	53.79	72.60	101.00	67.05	110.65		481.83	325.69
2008	122.79	149.72	68.74	89.97	105.89	73.84	115.46	163.22	138.26	179.96		693.14	476.86

Source: IDATE / industry data / Ofcom
Note: USA and Canada include incoming calls

Figure 4.34

Monthly outbound mobile messages per mobile subscription: 2003 and 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	36.18	17.00	25.59	31.19	14.15	2.31	0.00	28.14	27.54		18.14	78.01
2008	92.63	51.12	23.96		264.48	83.39	0.00	149.60	18.86	32.46	58.27	163.84

Source: IDATE / industry data / Ofcom

Note: USA and Canada include incoming calls

Figure 4.35

Average monthly revenue per mobile subscription: 2003 to 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	15.81	22.77	22.80	15.03	26.88	24.43	41.15	14.92	16.45	27.16	13.65	26.51
2008	17.01	23.36	14.62	11.55	25.34	29.48	29.30	9.11	19.32	18.30	12.87	19.94

Source: IDATE / industry data / Ofcom

Note: USA and Canada include revenues from incoming calls

Figure 4.36

Mobile connections and average monthly revenue per subscription: 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Connections per 100 population	125.99	90.19	129.35	155.77	89.60	65.30	83.05	114.10	114.77	122.31	126.27	128.90
Monthly ARPU (£)	17.01	23.36	14.62	11.55	25.34	29.48	29.30	9.11	19.32	18.30	12.87	19.94

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.37

Average monthly mobile voice and data revenue per subscription: 2003 and 2008 (£)

	UK		FRA		GER		ITA		USA		CAN		JPN	
	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008	2003	2008
Voice	12.9	12.7	20.8	19.0	19.2	11.5	12.6	8.2	25.4	19.6	22.6	23.4	31.7	18.0
Data	2.9	4.3	2.0	4.4	3.6	3.1	2.5	3.4	1.5	5.8	1.8	6.1	9.5	11.3
	15.8	17.0	22.8	23.4	22.8	14.6	15.0	11.5	26.9	25.3	24.4	29.5	41.2	29.3

Source: IDATE / industry data / Ofcom
Note: USA and Canada include revenues from incoming calls

Figure 4.38

Average monthly mobile SMS and non-SMS data ARPU: 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
SMS	3.3	3.0	2.4	2.0	5.8	1.6	0.0	1.9	2.3		1.4	
Non-SMS data	1.0	1.4	0.7	1.4	0.0	4.4	11.3	0.2	1.4		1.1	
Total data	4.3	4.4	3.1	3.4	5.8	6.1	11.3	2.0	3.7	4.4	2.4	4.9

Source: IDATE / industry data / Ofcom

Figure 4.39

Average revenue per outgoing mobile voice call minute: 2003 to 2008 (pence)

	2003	2004	2005	2006	2007	2008
UK	13.49	15.10	14.44	12.86	11.33	10.37
FRA	15.53	14.91	14.36	13.04	12.77	12.68
GER	38.42	37.61	33.80	26.35	18.65	16.71
ITA	16.20	15.04	13.51	11.45	10.64	9.07
USA	5.27	4.60	3.79	3.31	2.95	2.82
CAN	6.94	6.46	5.76	5.53	5.48	4.91
JPN	25.08	25.07	23.75	22.53	20.40	17.02

Source: IDATE / industry data / Ofcom
Note: USA and Canada include incoming calls

4. Telecoms

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- Fixed voice services
- Mobile voice and data services
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- BRIC countries

Figure 4.40

Availability of broadband services: 2003 and 2008 (% of population)

	UK	FRA	GER	ITA	CAN
2003	85.00	79.26	86.13	82.03	87.00
2008	100.00	100.00	96.60	95.30	94.00

Source: IDATE / industry data / Ofcom

Figure 4.41

Broadband revenues: 2003 and 2008 (£bn)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	0.78	1.16	1.57	0.88	6.19	1.19	1.96	0.06	0.81	0.58	0.32	0.01
2008	3.24	3.83	4.02	2.97	17.43	2.36	6.12	0.87	2.59	1.65	0.69	0.20

Source: IDATE / industry data / Ofcom

Figure 4.42

Broadband revenue per head: 2003 and 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	13.00	18.66	19.08	15.23	21.32	37.47	15.39	1.68	19.06	35.29	35.73	3.04
2008	53.10	59.61	48.81	51.05	57.36	71.03	48.00	22.68	56.60	97.65	76.16	47.67

Source: IDATE / industry data / Ofcom

Figure 4.43

Broadband as a proportion of total fixed revenues: 2003 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	6.49	8.91	8.81	8.10	8.42	14.97	8.25	2.32	11.54	14.77	14.31	1.08
2008	26.04	28.99	24.47	27.49	27.34	28.30	27.40	35.68	32.35	44.39	33.83	17.00

Source: IDATE / industry data / Ofcom

Figure 4.44

Broadband connections: 2003 and 2008 (m)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	3.11	3.66	4.57	2.51	25.92	4.89	13.60	0.36	2.28	1.92	0.97	0.03
2008	17.28	17.68	22.58	11.49	75.59	9.83	30.12	3.87	9.01	6.14	2.72	0.89

Source: IDATE / industry data / Ofcom

Figure 4.45

Broadband connections per 100 population: 2003 and 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	5.2	5.9	5.6	4.3	8.9	15.3	10.7	0.9	5.4	11.7	10.9	0.8
2008	28.3	27.5	27.4	19.8	24.9	29.6	23.6	10.1	19.7	36.4	30.1	21.4

Source: IDATE / industry data / Ofcom

Figure 4.46

Growth in broadband connections per 100 population: 2003 to 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Pre-2004	5.18	5.87	5.55	4.32	8.93	15.33	10.68	0.92	5.38	11.67	10.85	0.78
2004	4.98	4.90	2.90	3.85	3.23	2.94	3.94	1.34	2.66	8.16	4.41	2.57
2005	6.21	4.19	4.53	3.94	3.78	3.36	2.91	1.98	3.56	5.30	5.53	3.30
2006	5.09	5.01	4.89	2.69	3.10	3.01	2.67	2.49	3.51	6.09	5.16	6.08
2007	4.21	4.35	5.92	2.37	4.61	2.92	2.01	2.19	2.78	2.63	2.66	5.71
2008	2.67	3.18	3.63	2.59	1.23	2.05	1.42	1.13	1.82	2.53	1.51	3.00

Source: IDATE / industry data / Ofcom

Figure 4.47

Proportion of broadband connections with a headline speed above 8Mbit/s: end 2008 (%)

	UK	FRA	GER	ITA	POL	ESP	NED	SWE	IRL
2008	10	26	16	9	6	5	37	33	4

Source: IDATE

Figure 4.48

DSL as a proportion of all broadband connections: 2003 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	55.76	89.20	97.20	91.02	36.69	45.81	75.55	75.99	73.59	50.96	58.55	79.48
2008	78.47	95.04	92.46	96.64	39.90	44.26	38.53	70.25	79.70	61.44	63.76	74.05

Source: IDATE / industry data / Ofcom

Figure 4.49

Retail subscription share of the top three broadband providers: 2003 and 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	57.87	81.40	90.42	80.70	46.30	59.00	69.30	65.70	70.80	58.00	74.45	72.65
2008	64.71	93.01	69.67	83.33	51.10	58.00	71.51	70.46	80.47	75.04	81.23	57.90

Source: IDATE / industry data / Ofcom / CRTC

Figure 4.50

Average monthly revenue per broadband connection: 2003 and 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2003	29.14	36.22	32.99	40.73	23.64	22.91	15.26	19.58	37.26	31.80	31.56	54.66
2008	16.40	19.22	15.89	23.05	19.79	20.79	17.45	19.90	25.26	23.22	21.63	20.02

Source: IDATE / industry data / Ofcom

Figure 4.52

Voice over Internet Protocol subscribers per 100 population: 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
2008	9.97	22.32	8.98	6.52	6.45	8.78	15.37	1.21	2.81	18.43	8.13	3.43

Source: IDATE / industry data / Ofcom

Figure 4.52

Growth in Voice over Internet Protocol subscribers per 100 population: 2006 to 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRL
Pre-2005	0.5	5.2	1.5	1.4	0.9	2.5	9	0	0.4	4.7	2.4	0
2006	2.2	5.2	1.9	0.9	0.9	2.4	1.8	0.1	0.2	7.3	2.1	0.6
2007	3.1	6.6	3.6	2.9	1.7	2.2	2.4	0.3	0.3	3.1	2.4	1
2008	4.3	5.4	1.9	1.3	2.9	1.8	2.2	0.8	2	3.4	1.2	1.8

Source: IDATE / industry data / Ofcom

Figure 4.53

VoIP share of fixed telephony revenues: 2006 to 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN
2006	0.62	1.77	0.78	0.59	1.47	3.35	3.98
2007	1.72	3.36	1.17	0.79	2.83	5.5	5.2
2008	3.86	5.08	1.8	1.4	5.82	7.69	6.87

Source: Ofcom / IDATE
Note: Excludes those who only make PC to PC calls

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Figure 4.54: Key indicators, 2008

	BRA	RUS	IND	CHN	UK
Population (m)	191	141	1,148	1,330	61
Median age	28.6	38.4	25.3	34.1	40.2
Surface area (sq km, metres)	8.5 million	17.1 million	3.3 million	9.6 million	244k
GDP (£bn)	857	914	659	2,399	1,457
GDP per capita	£5,557	£8,771	£1,580	£2,398	£19,885
Telecoms					
Total industry revenue (£bn)	28.2	16.4	10.9	55.6	27.8
Revenue per capita	£147	£117	£10	£42	£456
Fixed lines per 100 population	21	32	3	26	54
Mobile connections per 100 population	79	134	30	48	126
Broadband connections per 100 households	19	18	3	18	68
Television					
Total industry revenue (£bn)	7.0	3.6	3.8	6.9	10.4
from subscription	2.9	0.5	2.3	2.8	4.3
from public funding	0.1	0.0	0.0	0.0	2.6
from advertising	4.1	3.1	1.5	4.1	3.5
Revenue per capita	£36.7	£25.4	£3.3	£5.2	£170
Largest TV platform (proportion of homes)	ATT (87%)	ATT (53%)	Acab (63%)	ATT (49%)	DTT (38%)
Radio					
Total industry revenue (£m)	279	347	67	587	1,148

Figure 4.55

Growth in take-up of mobile services, 2004 to 2008 (per cent)

	BRA	RUS	IND	CHN	UK
Pre-2004	46.37	35.89	28.44	268.65	52.80
2004	19.83	38.55	19.57	48.47	7.23
2005	20.01	50.17	27.93	57.33	5.78
2006	14.01	27.38	73.68	69.15	4.27
2007	20.76	22.03	84.01	88.23	3.73
2008	29.66	13.80	113.27	109.40	2.98

Source: IDATE / national regulators / OECD / operators / Ofcom

Figure 4.56

Total fixed exchange lines (m)

	BRA	RUS	IND	CHN	UK
2004	41	39	45	255	30
2008	40	45	38		28

Source: IDATE / national regulators / OECD / operators / Ofcom
Note: PSTN lines include ISDN connections at PSTN line equivalent (e.g. one ISDN30 line = 30 PSTN lines)

Figure 4.57

Mobile connections & fixed lines per 100 population, 2004 and 2008

	2004						2008				
	BRA	RUS	IND	CHN	UK		BRA	RUS	IND	CHN	UK
Mobile	35.96	51.87	4.46	24.42	99.60		78.50	133.50	30.22	48.21	125.99
Fixed	21.51	27.18	4.17	19.72	57.11		21.42	32.25	3.30	26.30	54.23

Source: IDATE / national regulators / OECD / operators / Ofcom

Figure 4.58

Broadband connections and broadband connections per 100 households, 2008

	BRA	RUS	IND	CHN	UK
Broadband connections	10	9	5	71	17
Connections per 100 households	19	18	3	18	68

Source: IDATE / national regulators / OECD / operators / Ofcom

Figure 4.59

Revenue by service type, 2005-2008 (£m)

	BRA				RUS				IND				CHN				UK			
	2005	2006	2007	2008	2005	2006	2007	2008	2005	2006	2007	2008	2005	2006	2007	2008	2005	2006	2007	2008
Broadband	972	1,327	1,700	2,133	231	330	503	825	120	411	711	1,111	2,721	3,446	4,354	5,577	2,160	2,684	3,102	3,236
Mobile	7,810	9,305	11,586	13,196	4,965	6,887	9,533	11,803	2,502	3,814	5,650	6,940	24,783	28,393	33,022	36,561	13,069	13,809	15,043	15,374
Fixed	12,129	11,899	12,105	12,921	3,192	3,479	3,726	3,763	3,917	3,607	3,231	2,851	16,417	16,132	14,799	13,426	9,994	9,545	9,403	9,193

Source: IDATE / national regulators / OECD / operators / Ofcom / operators

Figure 4.60

Average revenue per user by service type, 2007 and 2008

	BRA				RUS				IND				CHN				UK		
	Fixed	Mobile	Broad band		Fixed	Mobile	Broad band		Fixed	Mobile	Broad band		Fixed	Mobile	Broad band		Fixed	Mobile	Broad band
2007	26	9	22		7	5	9		6.55	2	24		4	6	8		28.24	20.38	19.87
2008	27	8	21		7	5	9		6.58	2	22		3	5	8		27.81	20.02	18.73

Source: IDATE / national regulators / OECD / operators / Ofcom

Figure 4.61

Monthly mobile data and voice ARPU, 2007 and 2008 (£)

	BRA		RUS		IND		CHN		UK	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
Voice	8.1	7.4	4.4	4.8	2.5	2.3	4.3	3.8	15.3	15.0
Data	0.6	0.7	0.4	0.6	0.1	0.1	1.4	1.4	5.0	5.0
Total	8.7	8.1	4.9	5.4	2.6	2.4	5.6	5.2	20.4	20.0

Source: IDATE / national regulators / OECD / operators / Ofcom

5. Converging markets

Figure 5.1

The internet's share of total advertising expenditure, 2006 to 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRE
2006	14.4%	6.7%	9.4%	5.3%	10.0%	7.8%	8.1%	3.4%	4.2%	13.8%	13.3%	0.9%
2007	18.8%	13.1%	12.8%	7.1%	12.6%	10.3%	10.1%	8.1%	6.2%	16.6%	16.8%	1.4%
2008	23.2%	15.6%	15.3%	8.7%	14.8%	12.7%	12.4%	11.0%	9.1%	18.4%	19.4%	1.3%

Source: WARC
*Note: Total ad spend excludes Direct Mail. Data prior to 2006 not available due to comparability issues; *2006 Poland data not directly comparable with 2007/08.*

Figure 5.2

Trade digital music sales revenue per capita, 2006 to 2008 (£)

	UK	FRA	GER	ITA	USA	CAN	JPN
2006	£1.07	£0.71	£0.54	£0.26	£1.98	£0.53	£1.86
2007	£1.42	£0.87	£0.73	£0.26	£2.75	£0.87	£2.78
2008	£2.24	£1.35	£0.81	£0.27	£3.18	£1.25	£3.49

Source: IDATE, IFPI, Ofcom

Figure 5.3

Voice over Internet Protocol subscribers per 100 population, 2004 to 2008

	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRE
2004	0.2	1.5	0.3	0.6	0.5	0.0	6.5	0.0	0.2	2.3	1.4	0.0
2005 growth	0.3	3.7	1.2	0.8	0.4	2.5	2.5	0.0	0.2	2.4	1.0	0.0
2006 growth	2.2	5.2	1.9	0.9	0.9	2.4	1.8	0.1	0.2	7.3	2.1	0.6
2007 growth	3.1	6.6	3.6	2.9	1.7	2.2	2.4	0.3	0.3	3.1	2.4	1.0
2008 growth	4.3	5.4	1.9	1.3	2.9	1.8	2.2	0.8	2.0	3.4	1.2	1.8
Total	10.0	22.3	9.0	6.5	6.5	8.8	15.4	1.2	2.8	18.4	8.1	3.4

Source: Ofcom/IDATE
Note: Excludes users who only make PC-to-PC calls.

Figure 5.4

VoIP share of fixed telephony revenues, 2006 to 2008 (%)

	UK	FRA	GER	ITA	USA	CAN	JPN
2006	0.6%	1.8%	0.8%	0.6%	1.5%	3.4%	4.0%
2007	1.7%	3.4%	1.2%	0.8%	2.8%	5.5%	5.2%
2008	3.9%	5.1%	1.8%	1.4%	5.8%	7.7%	6.9%

Source: Ofcom/IDATE
Note: Excludes those who only make PC-to-PC calls

Figure 5.5

Availability of selected cellular networks, 2008 (% of population)

Availability (%)	UK		FRA		GER		ITA		USA		CAN	
	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008	2007	2008
2G	100%	100%	99%	99%	99%	99%	100%	100%	95%	98%	98%	98%
3G	92%	93%	70%	77%	>80%	85%	78%	93%	78%	88%	78%	91%
HSPA	87%	91%	70%	77%	70%	85%	78%	92%	15%	40%	n/a	n/a

Source: IDATE
Note: No data are available for HSPA in Canada. CDMA 2000 EV-DO standards are available alongside HSPA in the USA and Canada.

Figure 5.6

IPTV subscribers, 2008 (m)

IPTV households (m)	UK	FRA	GER	ITA	USA	CAN	JPN	POL	ESP	NED	SWE	IRE
2007	0.04	2.90	0.12	0.37	1.40	0.15	0.38	0.04	0.57	0.20	0.36	0.01
2008	0.07	3.60	0.50	0.54	2.91	0.23	0.55	0.09	0.71	0.23	0.46	0.04
% of digital subs, 2008	0.3%	19.9%	3.6%	3.7%	3.4%	3.0%	1.8%	1.5%	6.3%	6.0%	16.2%	4.4%

Source: "World Television Markets 2008", IDATE.
Note: UK total excludes BT Vision.

Figure 5.7

Unique online audience, September 2009 (m)

	UK	FRA	GER*	ITA	USA	JPN	ESP
August 2009	37.6	35.9	44.6	21.5	196.8	52.7	23.5
September 2009	39.0	37.1	45.1	22.9	194.3	51.4	24.6
Monthly change	3.8%	3.3%	1.1%	6.3%	-1.3%	-2.4%	4.6%

Source: The Nielsen Company, NetView, Sept 09 (Internet Applications Included, Home & Work).
*Note: *Home only data.*

Figure 5.8

Online reach of member communities, September 2008 and 2009 (%)

	UK	FRA	GER*	ITA	USA	JPN	ESP
September 2008	66%	63%	50%	67%	69%	75%	70%
September 2009	74%	70%	58%	77%	74%	75%	77%
Percentage point change 08-09	8.1	6.6	7.9	9.7	5.4	-0.9	7.2

Source: The Nielsen Company, NetView Home and Work Data, September 2008 – September 2009
*Note:*Home only; e.g. in Sept 0209 'Member Communities' reached 74% of the UK online population compared to 66% in Sept 2008.*

Figure 5.9

Number of people accessing social networking sites via the mobile internet, Q3 2009

	UK	FRA*	GER	ITA	USA	ESP
SNS unique audience (m)	3.5	0.7	1.1	1.2	17.9	1.1
Proportion of mobile web users who access SNS (%)	30.9%	12.6%	12.8%	16.1%	30.1%	16.7%

*Source: The Nielsen Company, Mobile Media View, Q3 2009 (*France Q1 2009).*
Note: e.g. 30.9% of UK Mobile Web users (3.5 million people) visited a social network through their mobile phone in Q3 2009.