



International Communications Market Report 2015

6 Internet and online content

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6.1 Key market developments in internet and online content

6.1.1 Introduction

Figure 6.1 Internet and online content: key international statistics

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	SWE	NED	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Online universe (m)* (2015)	39.8	37.0	51.2	26.5	204	73.7	16.0	21.5	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 population† (2014)	37	40	35	23	30	39	29	28	34	41	21	33	39	11	19	1	18	0
Dedicated mobile data connections per 100 population† (2014)	8	6	10	11	9	12	26	4	23	6	15	2	1	3	14	1	1	3
Internet access via a smartphone/mobile phone (%)‡ (2015)	61	59	62	82	53	60	64	83	69	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Source: IHS / Industry data / Ofcom / comScore

*comScore MMX, August 2015, home and work panel, persons 15+

† IHS / Industry data / Ofcom, 2015.

‡ Ofcom consumer research September-October

While the internet has fast become a feature of people’s lives across the world, the way in which they use it and what they use it for can vary significantly. This chapter considers how people have adopted the internet to communicate and consume content, and how this differs between the specific countries compared in this report.

This chapter is split into three sections:

- In this section (6.1) we look at internet advertising markets, e-commerce, mobile payments and connected devices in daily life. As advertising is a significant source of revenue online, we consider the size of internet advertising in relation to other advertising markets. E-commerce has changed the way many businesses function and how consumers purchase goods and services, therefore we note the variation in e-commerce markets across countries. As a feature which has been rolled out on a number of popular handsets, we consider mobile phone payment technology and compare the take-up of mobile payment solutions between countries. We also examine the take-up of a number of connected devices to manage aspects of everyday life.
- In section 6.2 we examine how people access the internet, which devices people use to connect to the internet, the respective size of countries’ online audiences, how long people spend online and how adoption of the internet varies by demographic.
- In section 6.3 we consider what internet users do once they are online, including which websites are most visited, which apps are most downloaded, and how this behaviour varies by demographic and by device.

Key findings

In summary, the key findings from this section of the chapter are:

- **The UK and China have the greatest share of all advertising expenditure on the internet, with 43% of all spending on advertising being online in 2014.** However, year-on-year growth was higher in China (9%) than the UK (3%).
- **Mobile internet advertising spend was greatest in the UK, at almost £25 per head,** followed by £23.69 in the USA and £17.66 in Australia. All comparator countries experienced year-on-year growth in mobile internet advertising spend, in contrast to fixed spend which declined in the USA, Japan, Australia and Spain.
- **The UK had the highest per capita spend on e-commerce in 2014, at £1591 per head.** E-commerce expenditure per capita in the UK was over 50% higher than in the US, the next-highest-valued market, which had an average spend of £918 per head.
- **Over a third of smartphone users in the UK shop online once a week or more.** In the UK, over a third (34%) of smartphone owners claimed to use their device to shop online at least weekly or more often. Online shopping with a smartphone at least weekly was most common in the US, where 38% claimed to do so.
- **The use of connected devices to manage daily life is highest in Italy and the US.** Smartphone users in the US and Italy were most likely to claim to have used connected devices in the home. In both countries, around a third of smartphone owners claimed to have used their device for monitoring their fitness.

6.1.2 Internet advertising

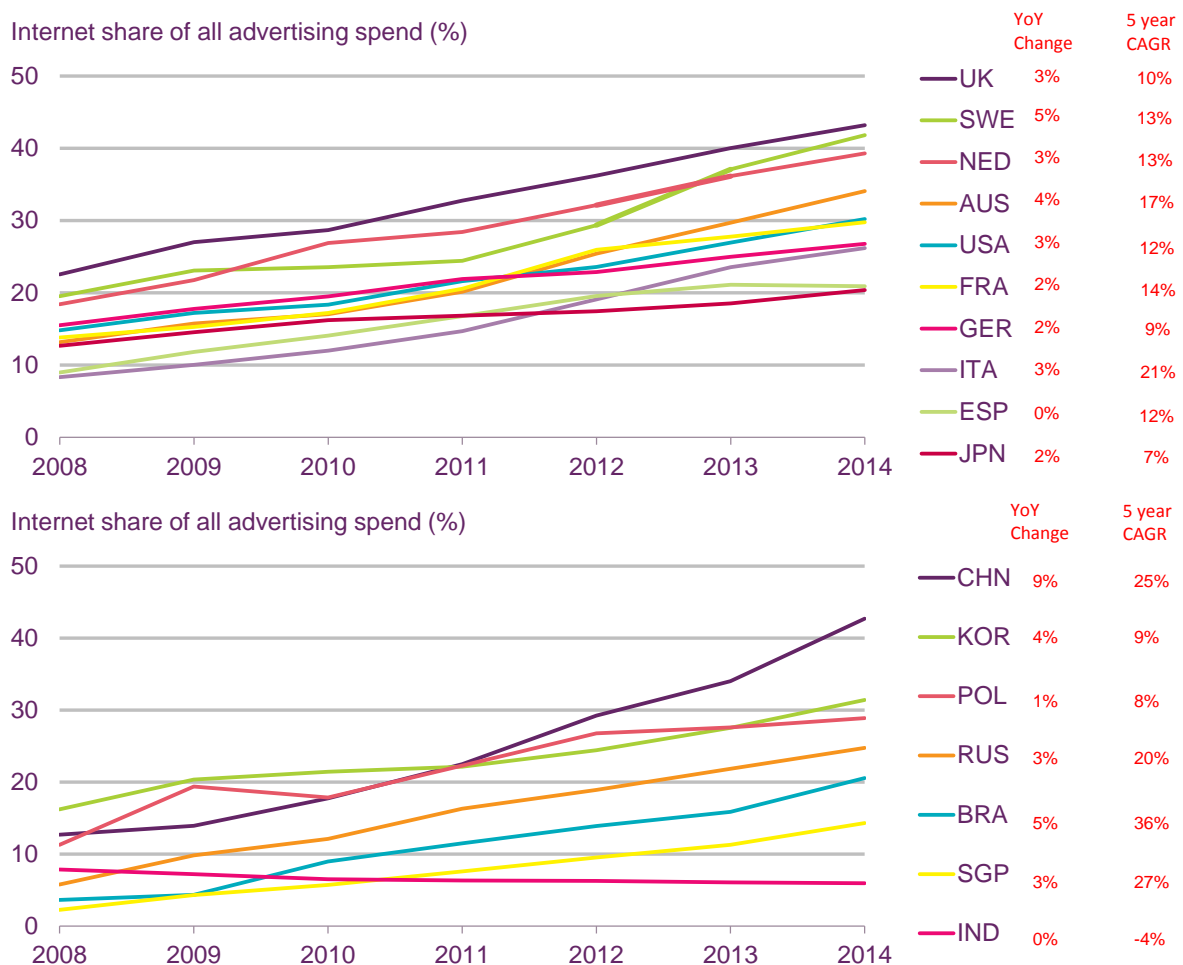
The internet's share of total advertising expenditure is highest in the UK and China

In 2014, the internet accounted for 43% of total advertising expenditure in the UK, equal with China (43%) and just ahead of Sweden (42%). The countries with the lowest share of spending on internet advertising as a proportion of all advertising expenditure in 2014 were India (6%), Singapore (14%) and Brazil (21%).

The fastest year-on-year growth was seen in China (9%) followed by Sweden (5%), while internet advertising share in the UK grew by 3% in the same period. There was growth in the internet's share of total advertising expenditure in all but two of our comparator countries: India and Spain, where internet share remained flat.

Brazil had the highest five-year compound annual growth rate (2009-14), at 36%, starting at a relatively low base, while Singapore came second (27%). Of our comparator countries, only India had a negative five-year compound annual growth rate (-4%).

Figure 6.2 Internet share of total advertising spend



Source: Warc data (www.warc.com)

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

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

Sweden, followed by the UK, had the highest fixed internet advertising expenditure per head in 2014

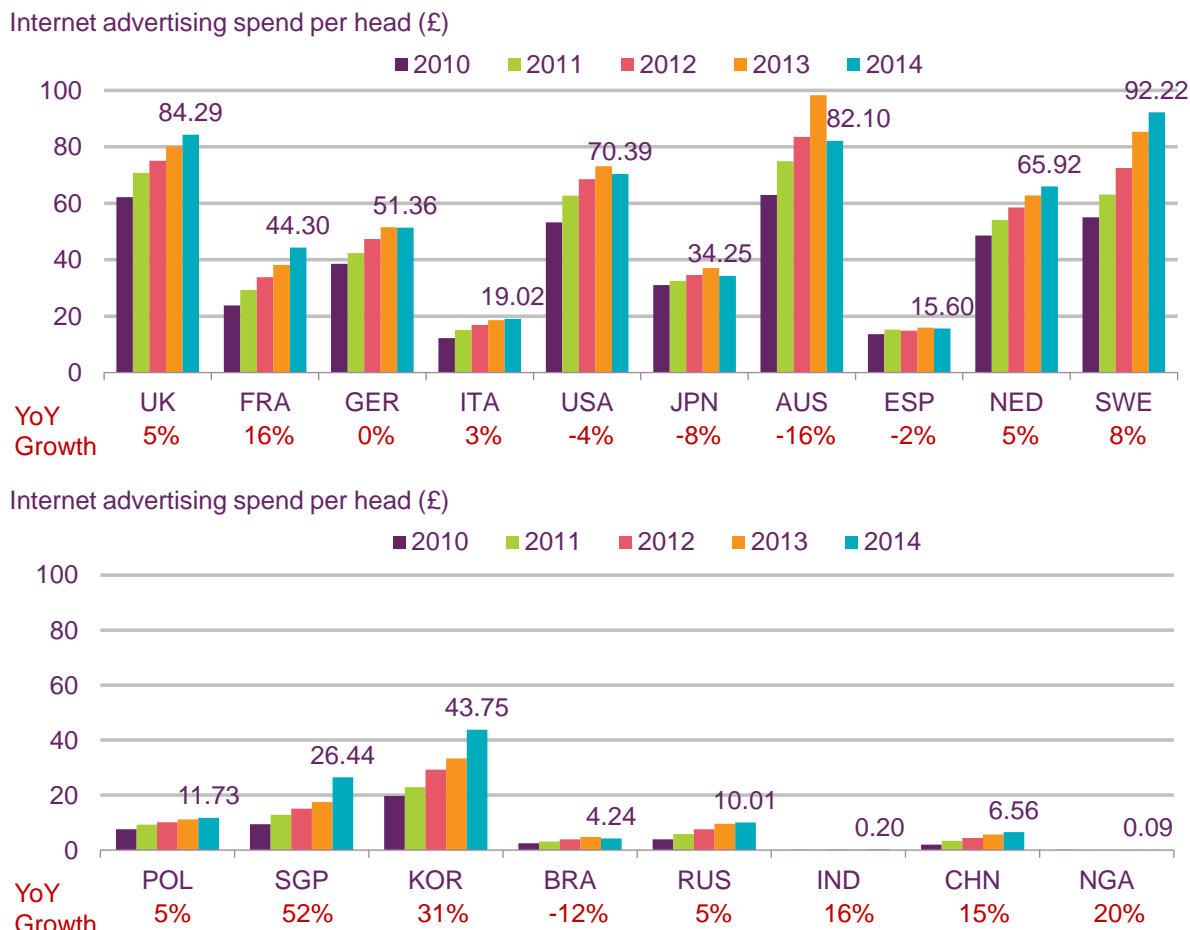
Internet advertising is spending by advertisers on paid search, banner/display, classified, video and other online formats such as email and sponsorship (including mobile advertising). Fixed internet advertising is a subset of internet advertising and refers to spend on adverts viewed on fixed or ‘wired’ devices, predominantly through web browsers on laptop and desktop computers. Although these devices could access the internet through a mobile rather than a fixed broadband connection, wired advertising remains distinct from mobile advertising, which is advertising viewed on a mobile handset.

Mobile advertising includes all advertising delivered directly to the mobile device, and includes search and display advertising as well as SMS/MMS advertising formats. Mobile display advertising can also be delivered to the device’s browser or to a mobile app.

Sweden’s spend per head on fixed internet advertising in 2014 was just over £92, the highest among our comparator countries (Figure 6.3). The UK had the second highest spend, at £84, with Australia coming in third, at £82. Australia’s spend per head decreased 16% year on year, but this could be attributable to factors such as significant currency fluctuations and a substitution for expenditure on mobile internet advertising, as indicated by strong growth in this sector (see Figure 6.5).

In the BRIC countries¹²⁸, Nigeria, Poland, Singapore and South Korea, there were varying degrees of expenditure on internet advertising per head, from just £0.20 in India to nearly £44 in South Korea. Some countries with low levels of expenditure per head in absolute terms experienced high levels of year-on-year percentage point growth (India 16%, China 15% and Nigeria 20%).

Figure 6.3 Fixed internet advertising expenditure per head: 2010-2014



Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/HIS. All figures expressed in nominal terms.

Search advertising continues to account for a large share of fixed internet advertising expenditure

Generally, there was little or no change in the share of expenditure on different forms of online advertising across most of our comparator countries between 2013 and 2014 (Figure 6.4). However, there were some exceptions: in Australia spending on classified advertising increased, relative to other forms of advertising, from 20% to 26%, while in Russia paid search's advertising share increased from 68% to 72%.

There was notable variation between countries, with different proportions of revenue attributed to different advertising forms. Yet, in over half of the comparator countries, more was spent on search advertising than on other types. The respective strengths of internet

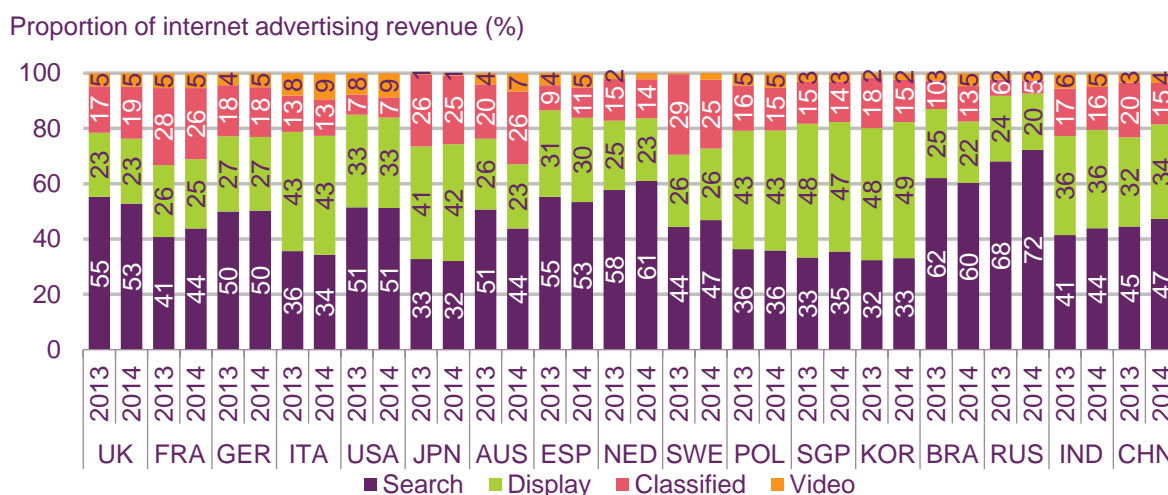
¹²⁸ Brazil, Russia, India and China.

classified, display, search and video advertising are likely to be the result of a number of country-specific factors including broadband penetration, broadband speeds, and the strength of other media competing for advertising spend.

Video advertising continued to account for a small share of fixed internet advertising expenditure. In most of our comparator countries, video growth was flat, or rose by one percentage point. Online video display advertising can take one of two forms. The first is similar to display advertising on websites, but in the form of an audio-visual advert rather than a static image or series of animated images, and like banner advertising, can sit in the page alongside other content. The second is similar to traditional spot television advertising, where adverts are shown either before, after, or mid-way through an online video, and the advert is embedded within the video player.

Online classified advertising is brief adverts, usually in small print, in an online newspaper, magazine or similar publication. In 2014, the US was the only country in which expenditure on video advertising was greater than spending on classified advertising (at 9% and 7% respectively). Classified advertising had a much smaller share of expenditure in the US than in other markets, such as France and Australia, where it accounts for over a quarter of advertising expenditure.

Figure 6.4 Fixed internet advertising expenditure, by category: 2013-2014



Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility

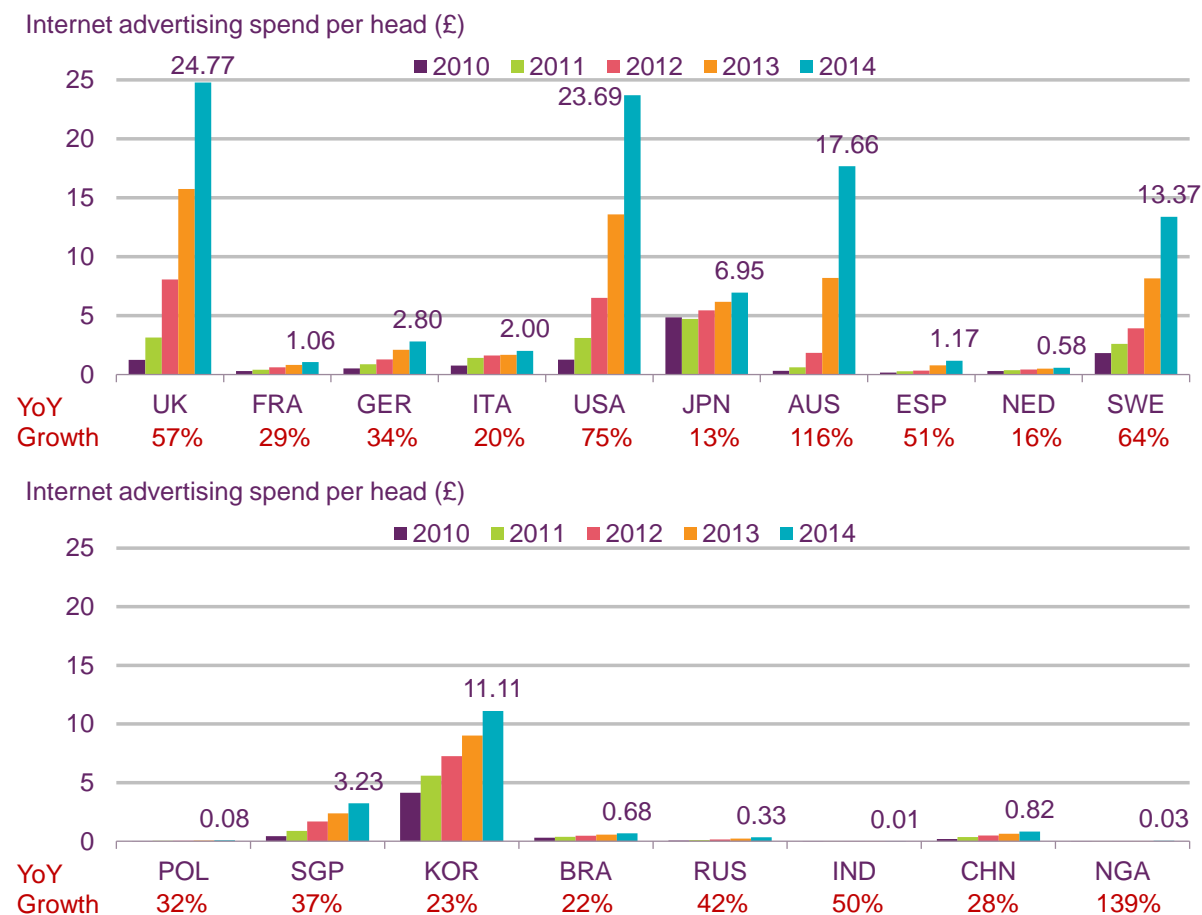
UK had the highest mobile expenditure per head in 2014 (£25), closely followed by the US (£24)

Of our comparator countries, the UK had the highest mobile advertising expenditure per head in 2014, at nearly £25, closely followed the US, at nearly £24. Year on year to 2014, mobile advertising expenditure per head in the UK grew by 57%, in the US by 75% and in Australia by 116%.

In the four years to 2014, mobile advertising spending per head in the UK grew by over £20 in absolute terms. But in some other countries in Europe - Italy at £2 per head, Spain at £1.17 per head, the Netherlands at £0.58 per head - growth was far less substantial. The strong performance of mobile advertising in the UK, the US and Australia was not necessarily related to take-up of smartphones and the mobile internet, as Spain and Italy had higher levels of take-up (see section 1.5.4). The higher spend may be due to a combination of factors, including established e-commerce and high overall advertising spend per head.

Some less economically developed countries saw proportionally high levels of year-on-year growth to 2014, but spending on internet advertising per head remains low in absolute terms. Nigeria experienced growth of 139% and India 50%, but just £0.03 and £0.33 was spent on internet advertising per head in each country, respectively.

Figure 6.5 Mobile internet advertising expenditure, per head: 2010-2014



Source: Ofcom analysis based on data from PwC Global Entertainment and Media Outlook 2015-2019 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/HIS. All figures expressed in nominal terms.

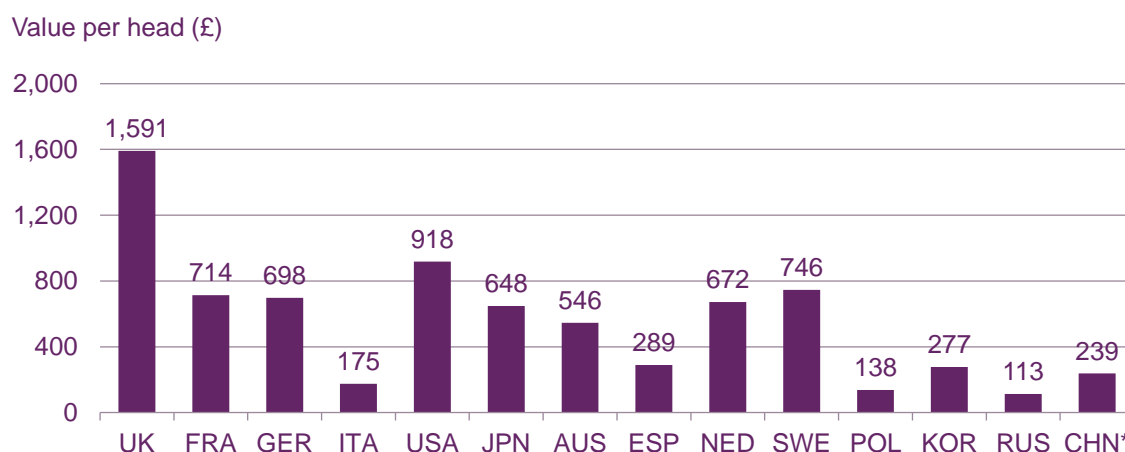
6.1.3 E-commerce

The UK had the highest per-capita spend on e-commerce among our comparator countries in 2014

The UK has a highly-developed e-commerce market, with the value of business-to-consumer (B2C) e-commerce at £1591 per head in 2014. This is substantially higher than the next highest-valued markets: the US (£918 per head), and Sweden (£833 per head). The UK's high per-capita spend on e-commerce may be due to a combination of factors, including trust in the postal service, a traditionally strong appetite for catalogue shopping and high use of debit and credit cards.

The value of e-commerce per head was relatively low in Italy (£175) and Spain (£289), despite high proportions smartphone users claiming to shop online regularly (Figure 6.7).

Figure 6.6 Value of B2C e-commerce, per head: 2014



Source: *European B2C e-commerce report 2015, Ecommerce Europe*

Notes: Values converted from Euros to British Sterling (£1 = €1.23916319291147). Population figures from Ofcom/IHS. *China also includes C2C goods and services.

Nearly two-fifths of smartphone users in the US and over a third of smartphone users in the UK shop online once a week or more

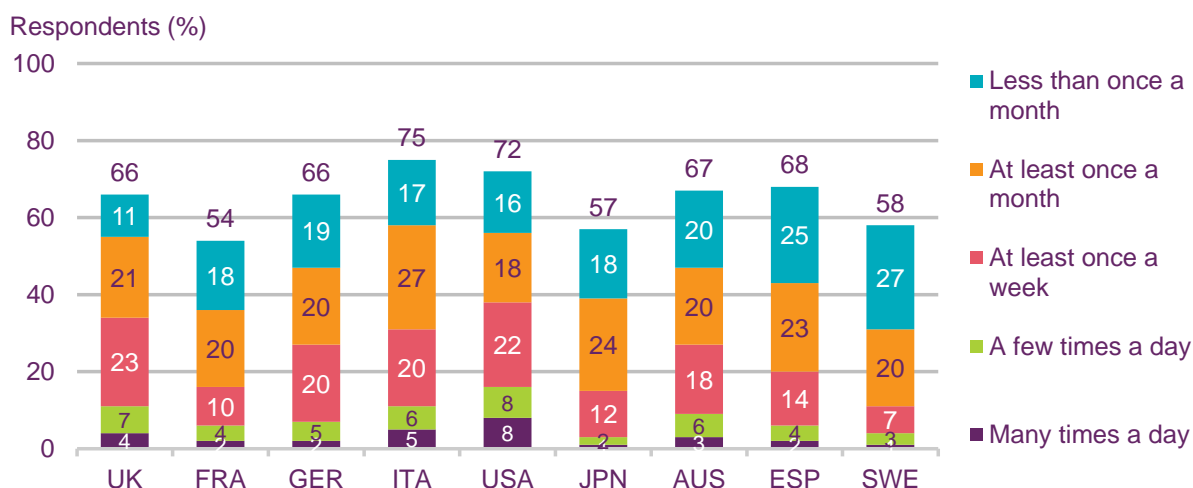
As a proportion of all smartphone users, the US had the greatest share of those who use their phone to shop online many times a day, at 8%, while the countries with the largest proportion of respondents who have used their smartphone to shop online were the US (72%) and Italy (75%)¹²⁹. Two-thirds of UK smartphone owners claimed to have used their device to shop online (66%).

In the UK, over a third (34%) of smartphone owners claimed to use their device to shop online at least weekly or more often, while in the US, 38% claimed to do so. France (16%), Germany (27%) and Spain (20%) had a significantly smaller share of their smartphone users claiming to shop online weekly or more often.

We consider smartphone take-up of our comparator countries in section 1.5.4 on page 60.

¹²⁹ Some countries have a relatively high proportion of respondents who claim to shop online, but relatively low expenditure on ecommerce per head. This might be because buying low-value items online is more common in some countries than in others, or because some respondents might interpret 'shopping online' as including time spent browsing for things to buy.

Figure 6.7 Use of smartphone to shop online



Source: Ofcom consumer research September-October 2015

Base: All respondents with a mobile phone who use a smartphone, UK=631, FRA=602, GER=688, ITA=759, USA=501, JAP=693, AUS=598, ESP=780, SWE=695

Q.27 How often, if at all, do you use your main mobile phone to do each of the following? Shop online

6.1.4 Mobile payments

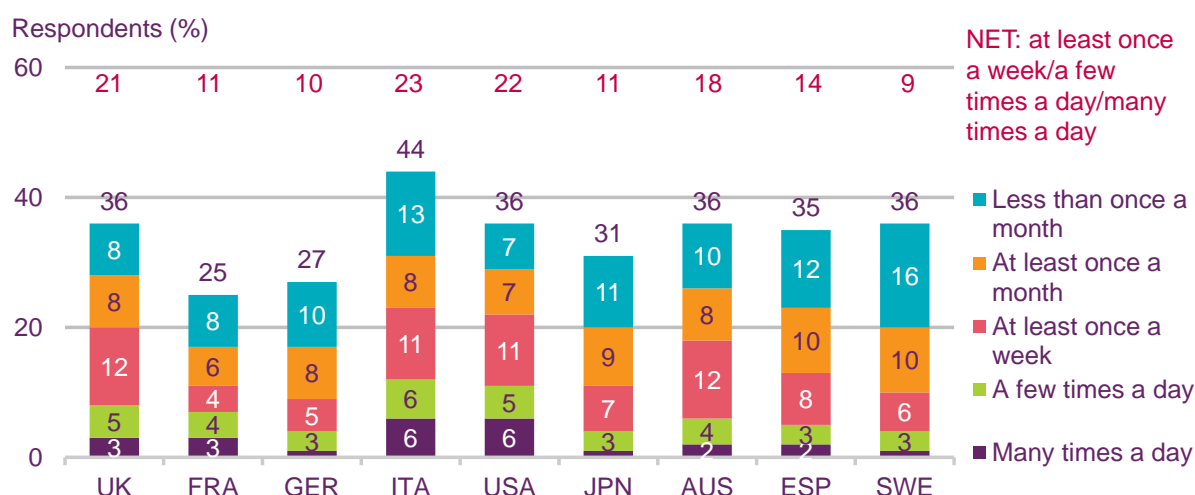
More than a third of smartphone owners in the UK and two-fifths of smartphone owners in Italy have used their device to make a payment

In the UK, more than a third (36%) of smartphone owners have used their device to make a mobile payment. Mobile payments are most popular in Italy, where they are used by 44% of smartphone owners. A mobile payment is defined as a point-of-sale purchase of goods or services with a mobile device. Examples include using an app, mobile wallet or premium-rate text, but exclude paying via a card on a supplier's website that is accessed on a mobile device.

Across all of the comparator countries, a minority of smartphone users had made a mobile payment. Smartphone users in France were the least likely to have used their device to make payments (21%), followed by a quarter (25%) of smartphone users in Germany. In most comparator countries, the largest segment of those who use mobile payments made them less than once a month.

As a proportion of all respondents, rather than of smartphone users, Italy (23%), the US (22%) and the UK (21%) had the highest proportion of respondents who said they had used their smartphone to make a payment.

Figure 6.8 Use of smartphone to make payments



Source: Ofcom consumer research September-October 2015

Base: All respondents with a mobile phone, UK=915, FRA=881, GER=931, ITA=945, USA=784, JAP=830, AUS=824, ESP=923, SWE=918

Q.27 How often, if at all, do you use your main mobile phone to do each of the following? Pay for goods or services (i.e. using an app/mobile wallet, QR code, NFC, premium rate text etc. and not simply paying via a card on a supplier's website)

6.1.5 Connected devices for daily life (internet of things)

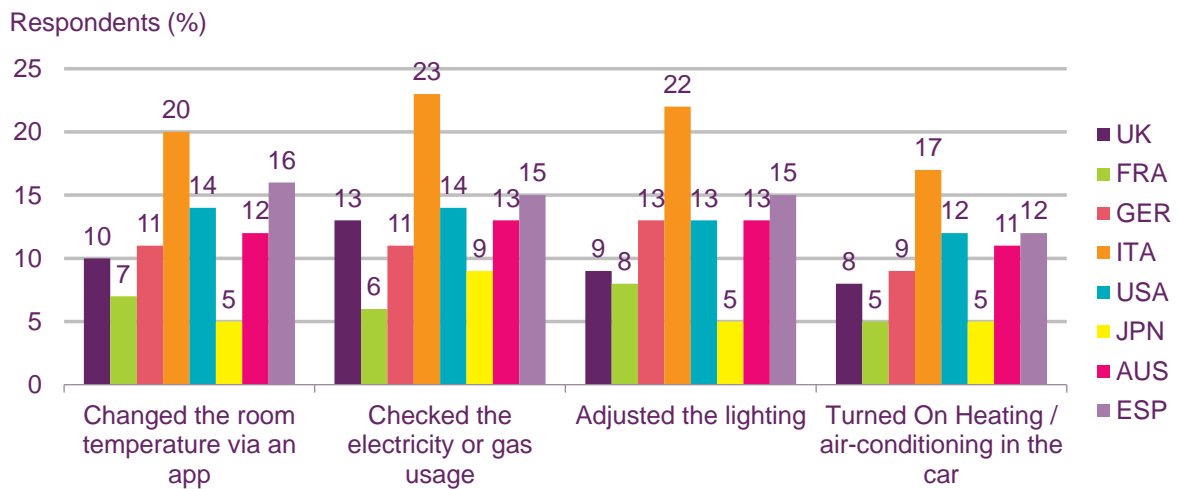
Smartphone owners in Italy are the most likely to have used their phone for home and car control and monitoring

Although take-up of home and car control and monitoring services was not very high in any of our comparator countries, differences by nation in the appetite for these services are evident.

In Italy, 23% smartphone users said they had used an app on their smartphone to check their gas and electricity use, compared to 13% in the UK and 6% in France. Only 9% of smartphone users in the UK had adjusted their lighting using their phone, compared to over a fifth (22%) in Italy.

The proportion of smartphone owners who had turned on the heating or air-conditioning in their car using their phone was 17% among Italian respondents, compared to 8% in the UK.

Figure 6.9 Use of smartphones for selected home and car control and monitoring activities



Source: Deloitte Global Mobile Consumer Survey 2015

Base: All adults who have a smartphone (UK N=3039, FRA N=1407, GER N=1491, JPN N=952, ITA N=1589, USA N= 1458, AUS N=1582, ESP N=1755)

Q: How frequently, if at all, do you do each of the following on your phone? (ever)

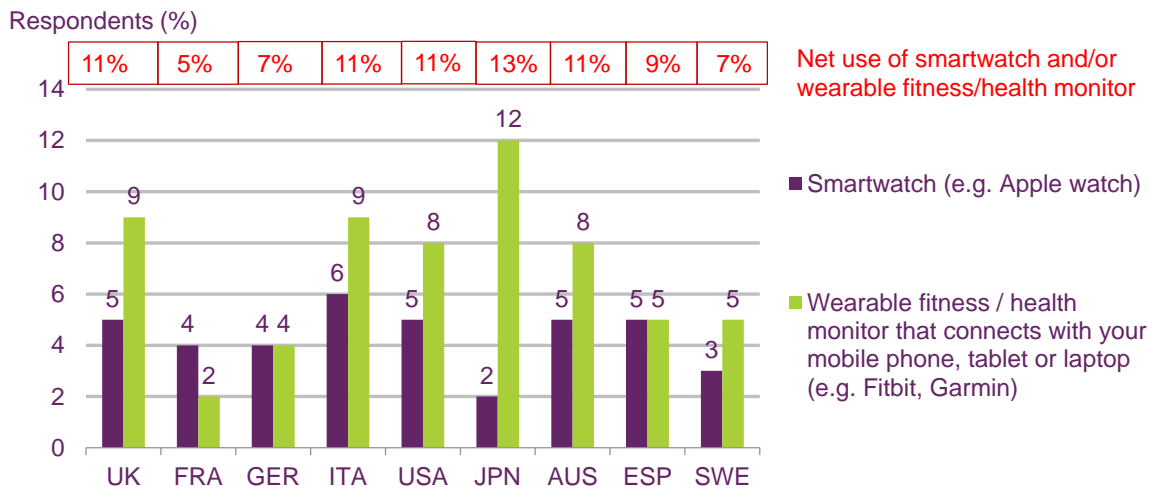
Smartwatch use remains relatively low in our comparator countries

A smartwatch is a computerised device that closely resembles a wristwatch but has functionality beyond timekeeping. Smartwatches are designed - either on their own or when paired with a smartphone – to provide features like connecting to the internet, running mobile apps and making calls.

Ofcom research conducted in October 2015 found that the take-up of smartwatches was relatively low across countries: take-up was less than 10% across all countries, and in the majority of countries it was 5% or lower.

‘Wearable fitness/ health technology’ includes wearable devices that monitor health/fitness, such as heart-rate monitors and sleep trackers. Take-up of wearable fitness/health technology was highest in Japan, with 12% of respondents claiming to use a wearable fitness/health device. The UK (9%) and Italy (9%) were among the countries with the highest levels of take-up of wearable fitness/health devices.

Figure 6.10 Use of wearable devices



Source: Ofcom consumer research September – October 2015
 Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004 Q.4a Which of the following devices do you personally use? 1) smartwatch (e.g. Apple watch) 2) wearable fitness / health monitor that connects with your mobile phone, tablet or laptop (e.g. Fitbit, Garmin).

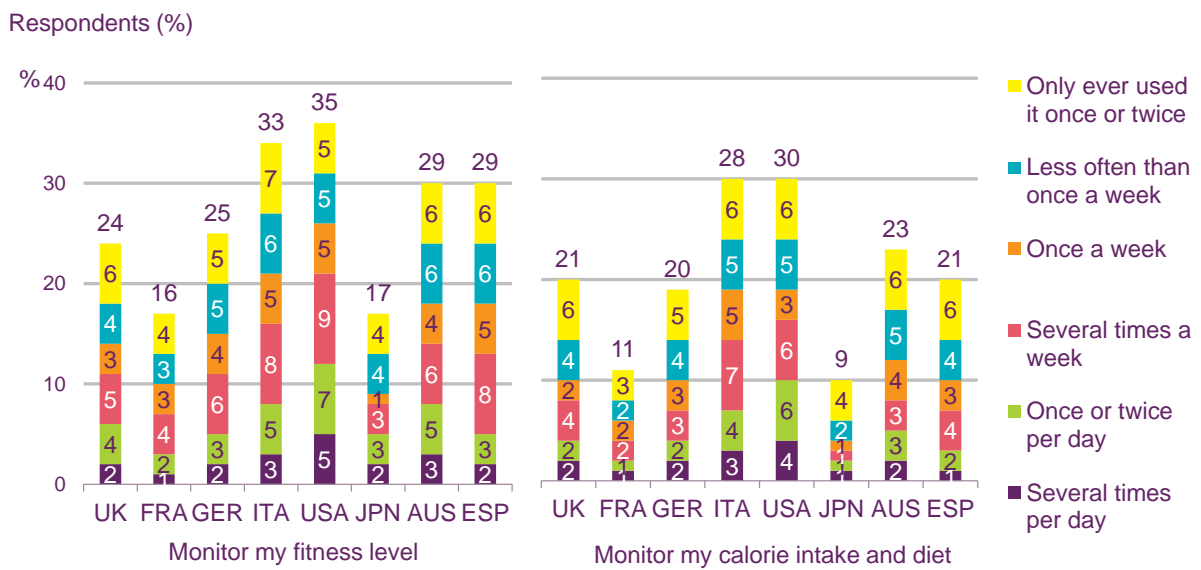
Monitoring diet and fitness on a smartphone is most common in the US and Italy

Monitoring diet and fitness using a smartphone has become possible through the availability of apps such as Moves and Fitbit. Apps can perform a range of functions, such as monitoring steps taken and calories consumed, and may connect to wearable devices and/or phone sensors.

The use of a smartphone to monitor fitness was highest in US and Italy, where 35% and 33% of smartphone owners had used their device to monitor their fitness, compared with 16% in France and 17% in Japan. In the UK, 24% of smartphone owners had monitored their fitness.

The US and Italy had the highest proportion of smartphone owners who had used their device to monitor their diet, at 30% and 28%, respectively. This was higher than in the UK (21%), France (11%) and Japan (9%), where it was lowest.

Figure 6.11 Use of smartphone for diet and fitness monitoring



Source: Deloitte Global Mobile Consumer Survey 2015

Base: All adults who have a smartphone (UK N=3039, FRA N=1407, GER N=1491, JPN N=952, ITA N=1589, USA N= 1458, AUS N=1582, ESP N=1755)

Q: How frequently, if at all, do you do each of the following on your phone?

6.2 Internet and devices

6.2.1 Introduction and key findings

Internet-enabled devices play a large part in defining the consumer experience and the range of content, communications and services accessed on the internet. In this section we examine internet access and the popularity of various devices.

- Section 6.2.2 considers the **technology** used by consumers to access fixed and mobile internet.
- Section 6.2.3 explores how **internet take-up** differs by age and gender among our comparator countries.
- Section 6.2.4 examines take-up of **internet-enabled devices** and how this varies by country;
- Section 6.2.5 delves into the length of **time spent online** on laptop and desktop computers by internet users in a selection of comparator countries.

Key findings

The key findings from this section of the chapter are:

- **Households in the UK and France are the most likely to have a fixed broadband connection.** Ninety-four per cent of households with broadband have a fixed broadband connection in the UK and France, compared with 77% in Italy, where households are least likely to have a fixed broadband connection.
- **Active audiences using laptops/ desktops are getting older in the comparator countries.** The highest proportion of laptop and desktop users aged over 55 was in Australia, at 30%, and in the UK, over-55s made up a quarter of users.
- **Use of tablets grew in the majority of comparator countries.** In five of the nine comparator countries, the use of tablets grew year on year to 2015, including in the UK, where take-up of tablets stands at 44%.
- **UK tablet users spend nearly 32 hours per month browsing.** In the UK in 2015, tablet users spent an average of nearly 32 hours browsing the internet in August 2015. This was slightly exceeded by US tablet users, who spent over 23 minutes longer browsing in the same month.
- **US internet users spend the most time browsing online on a laptop or desktop, at 34 hours per month, followed by the UK, at 33 hours per month.** The least time spent browsing was in Japan, at 18 hours per month.

6.2.2 Internet take-up, by technology

Online households in the UK and France are the most likely to have a fixed broadband connection

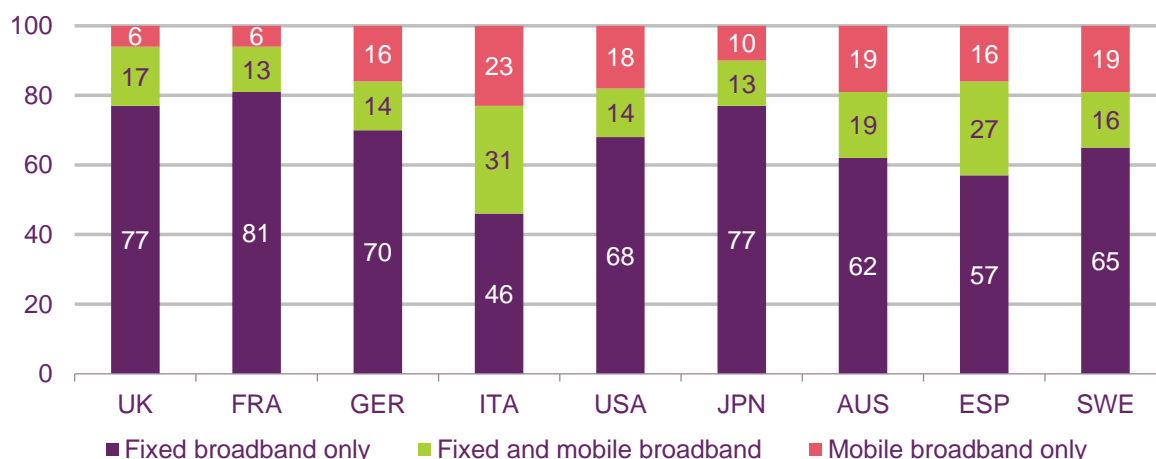
Among households with any broadband connection in the comparator countries, households in France and the UK were the most likely to have a fixed broadband connection (94%).

France had the highest proportion of those with broadband to have *only* a fixed connection, at 81%.

Italy had the highest proportion of mobile-only households in October 2015, at 23%, as well as the highest proportion of households with both fixed and mobile broadband (31%)¹³⁰. Having access to both mobile and fixed broadband connections was also popular in Spain (at 27% of households). The relatively low take-up of fixed broadband in Italy, and the corresponding high take-up of mobile broadband, might be due to a number of factors, such as the lack of widespread high quality infrastructure and the absence of a cable network.

Figure 6.12 Take-up of fixed and mobile broadband

Proportion of respondents with broadband in the home (%)



Source: Ofcom consumer research September-October 2015

Base: All respondents with broadband, UK=915, FRA=930, GER=842, ITA=861, USA=723, JPN=740, AUS=894, ESP=879, SWE=915

Q.3b Which of the following services do you have in your home?

comScore

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

This chapter predominantly draws from three comScore sources. For analysis of laptop and desktop computer internet activity we use comScore MMX, which employs comScore's Unified Digital Measurement methodology, explained below. The comScore MMX panel excludes Apple Mac computers, but census-level activity is captured from both PCs and Apple Macs. comScore MMX is consistent across the six comparator countries for which data are available: France, Germany, Italy, the US, Japan, Australia and Spain.

For analysis of mobile internet activity we use comScore Mobile Metrix. In the US and the UK comScore Mobile Metrix uses comScore's Unified Digital Measurement methodology, with panels of smartphone (iOS and Android handsets) and tablet users (iOS tablets only in

¹³⁰ Mobile broadband access via a dongle, data-card, mobile Wi-Fi modem or data-only SIM.

the UK, but iOS and Android tablets in the US). However, France, Germany, Italy, Japan, Australia and Spain comScore Mobile Metrix is informed only from census-level activity on publishers' digital content.

Finally, mobile phone user behaviour measurement is supplemented by consumer research, comScore MobiLens Plus, for the US and the UK, and comScore MobiLens for France, Germany, Italy, Japan, and Spain. The key differences between MobiLens Plus and MobiLens are: the former reports on tablets as well as smartphones, has an enhanced survey, and is aligned with Mobile Metrix data.

Unified Digital Measurement

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

Metrics

Throughout this report we refer to a number of metrics, defined below:

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

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

Digital audience – the active audience across all platforms (laptop/desktop computers, mobile phones and tablets, for those websites that are tagged in comScore's census network).

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

Time spent per month – the average time spent browsing a website per unique visitor per month (excludes time spent watching online video and listening to streamed music).

Dictionary

Each of the entities reported by comScore are attributed to a level in comScore's *Client Focused Dictionary*. Several entities can exist within one website (e.g. BBC Sport and BBC iPlayer) and comScore's dictionary defines how these entities are structured and related to each other. It is 'client-focused' because comScore's clients define how their websites appear in reports, according to this dictionary. All comScore reports use the same six-tier dictionary structure as explained below:

Property [P] - *The highest level of reporting in the Client Focus structure; Properties represent all Full Domains (i.e. felmont.com), Pages (i.e. sports.felmont.com/tennis), Applications or Online Services, under common ownership or majority ownership for a single*

legal entity. A Property may also contain digital media content that is not majority-owned but has been legally signed over for reporting purposes by the majority owner.

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

Channel [C], SubChannel [S], Group [G] and SubGroup [SG] - Within a Media Title there may be grouped URLs of editorially consistent content that make up a Channel. For some of the largest Media Titles, Channels themselves may be broad, and Subchannels, Groups and Subgroups within the larger Channels may prove useful for categorisation within the comScore Dictionary.¹³¹

6.2.3 Internet take-up

Active audiences using laptops /desktops increased in the US and the UK in 2015 but decreased in Spain

In the UK, there was a modest increase of 0.1 million in the active internet audience using laptops and desktops. This is in line with modest changes in the relatively mature fixed broadband markets in almost all of the comparator countries (0); there are fewer new adopters likely to go online. In the US, there was a more significant increase of 7 million active users (an increase of 3.5%).

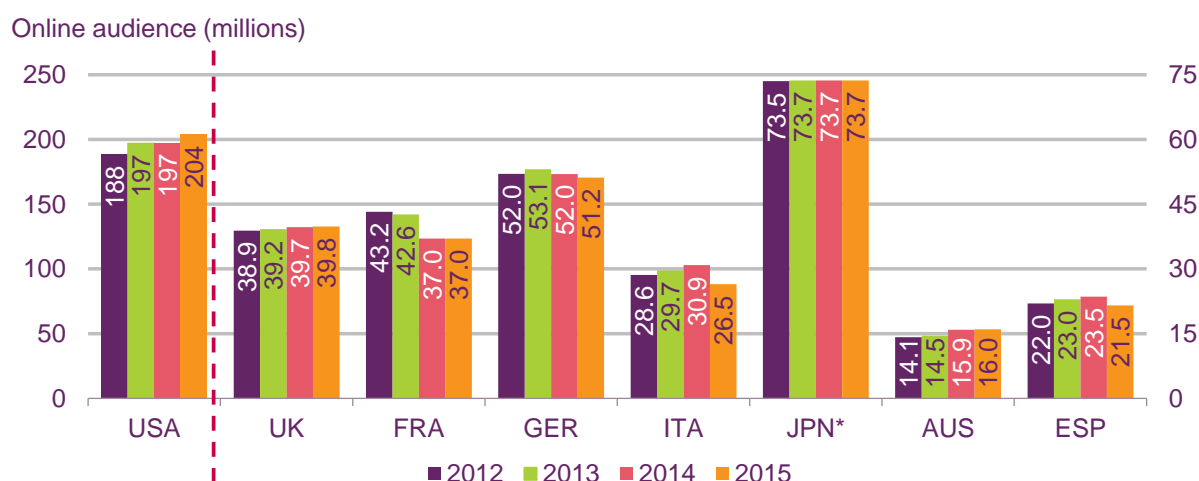
In Spain between August 2014 and August 2015, the active audience using laptops and desktops fell from 23.5 million to 21.5 million. This decline may be a result of an increase in mobile-only households, and the mature laptop and desktop market; there are few homes not online that are likely to get online in the near future.

The numbers of laptop and desktop active users remained stable in France (37.0 million) and Japan (73.7 million). In France, this may be attributable to levelling-off; there had been consecutive decreases over the three previous years¹³².

¹³¹ "Glossary – Key Terms for comScore Dictionary", comScore.

¹³² Active audience for Total Internet is calculated from enumeration surveys and not directly from comScore's panel. Consequently, year-on-year changes in total internet audience are not a reflection of panel-specific behaviour.

Figure 6.13 Active audience on laptop and desktop computers: 2012-2015



Source: comScore MMX, work and home panel, August 2012 to August 2015, persons 15+
 Note: Changes in comScore methodology occurred in September 2014 for Italy, in July 2014 for Germany and in April 2014 for Australia. Data before these dates should be treated with caution and should not be compared directly with current data.

Laptop and desktop active audiences are getting older in our comparator countries

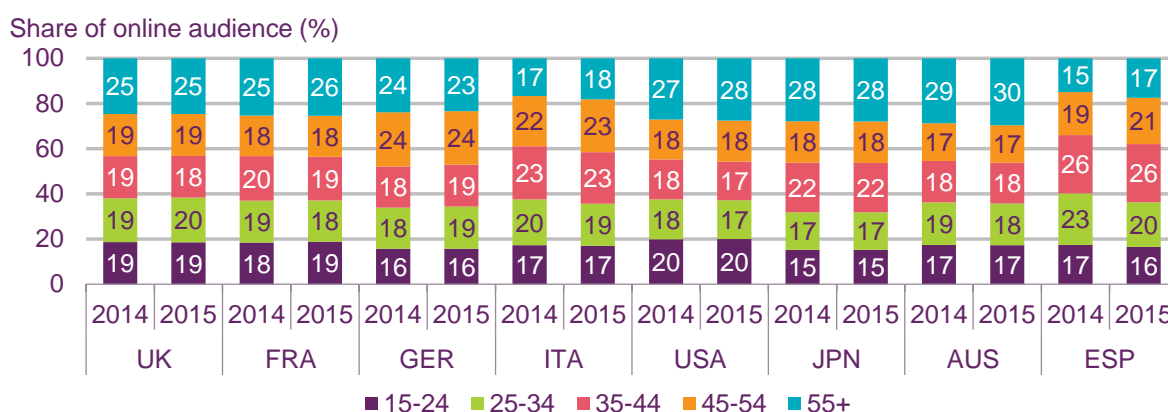
Laptop and desktop internet users aged 55 and over made up the largest proportion of users in most of our comparator countries (Figure 6.14). In the UK a quarter of users (25%) were over 55, compared to 26% in France and 28% in the US. In Australia, 30% of laptop and desktop users were over 55, the highest proportion among the comparator countries¹³³.

Spain and Italy had the highest proportions of laptop and desktop internet users aged under 45 in August 2014. Sixty-two per cent in Spain, and 59% in Italy, were under-45s.

The US had the highest proportion of laptop and desktop internet users aged 15-24, at 20%. In the UK, the active audience was more evenly distributed between the age groups, with 25% aged 55 and over, and the remaining age groups accounting for 18-20% each.

¹³³ Changes in the size and composition of active audiences within countries must be viewed within the context of population change. In many economically developed countries, there is an ageing population:
<http://www.un.org/en/development/desa/population/publications/pdf/trends/Concise%20Report%20on%20the%20World%20Population%20Situation%202014/en.pdf>

Figure 6.14 Active audience on a laptop or desktop computer, by age: 2014-2015



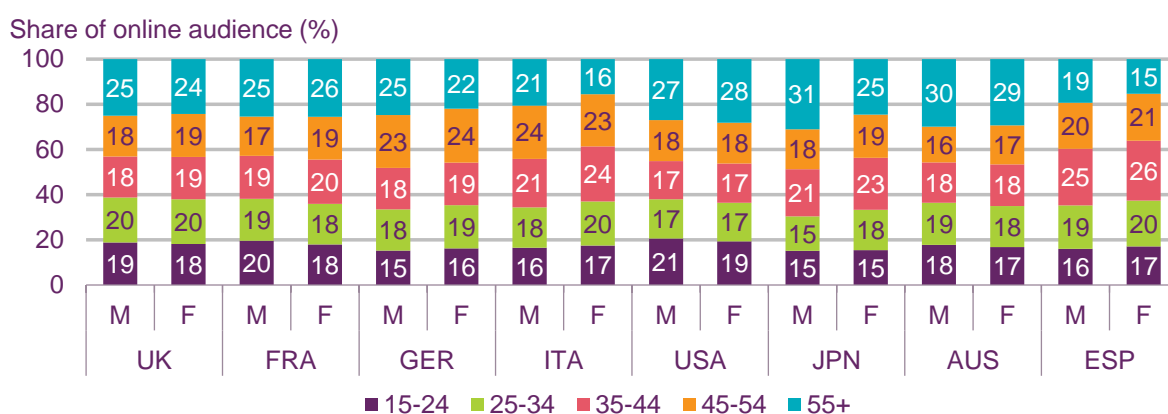
Source: comScore MMX, home and work panel, August 2014 and August 2015, persons 15+
 Note: Changes in comScore methodology occurred in September 2014 for Italy, in July 2014 for Germany and in April 2014 for Australia. Data before these dates should be treated with caution and should not be compared directly with current data.

Unlike Japan and Italy, there is little difference by age in the UK between male and female laptop and desktop users

In Japan and Italy, male laptop and desktop internet users were more likely than female users to be aged 55 or over in August 2015 (Figure 6.15). In Japan, 31% of the male laptop and desktop active audience was in this age group, as was 21% in Italy; in both countries there were proportionally fewer females in this age group. In contrast, the age breakdown by gender was almost equal in the UK and France.

In most of the comparator countries, there was no difference, or a difference of only 1%, between the genders among 15 to 24 year olds. The exceptions were the US and France, where males constituted 2% more than females of the share of online audience among 15-24s.

Figure 6.15 Active audience on a laptop or desktop computer, by age and gender: August 2015



Source: comScore MMX, home and work panel, August 2015, persons 15+
 Note: Changes in comScore methodology occurred in September 2014 for Italy, in July 2014 for Germany and in April 2014 for Australia. Data before these dates should be treated with caution and should not be compared directly with current data.

Japan had the oldest mobile internet users among the comparator countries

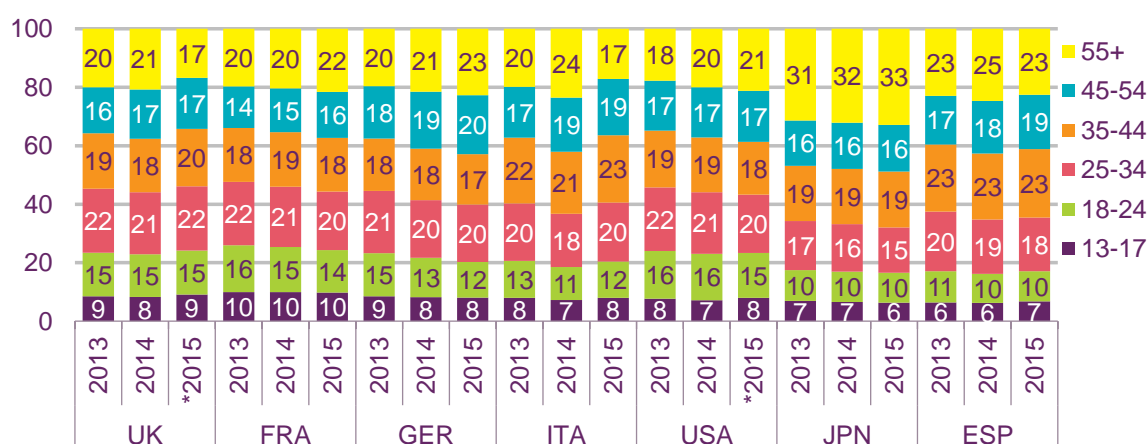
The over-55s make up a third (33%) of Japan's mobile internet users – a significantly larger proportion than in any of the other comparator countries. The next highest share of mobile internet users aged over 55 was in Spain, at 23%.

The largest share of mobile internet users aged 13-17 was in France, at 10%, while the smallest share was in Spain, at 7%.

The largest group of mobile internet users by age varied across countries, although in no country was the largest group the 13-17s or 45-54s. In the UK, the largest group by age was the 25-34s, at 22%, compared with the 35-44s, at 20%.

Figure 6.16 Mobile internet users, by age

Mobile internet users 13+ (%)



Source: comScore MobiLens, August 2013 (three-month average), August 2014 (three-month average), and August 2015 (three month average), mobile internet users aged 13+

Note: *For August 2015 (three-month average) UK and US results are from comScore MobiLens Plus

6.2.4 Internet-enabled devices

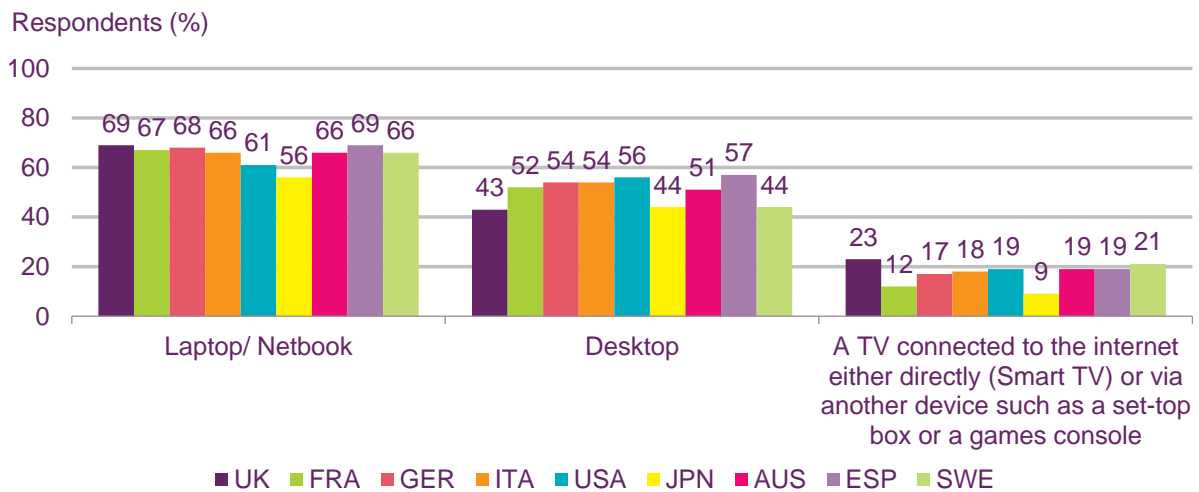
The UK had the highest proportion of people who use a connected TV to access the internet

A TV that is connected to the internet can be connected either directly (a smart TV) or indirectly via another device, such as a set-top box or a games console.

Ofcom research conducted in September – October 2015 found that 23% of respondents in the UK accessed the internet through TVs with an internet connection – the highest of all the comparator countries. However, accessing the internet through internet-connected TVs remains a relatively niche activity across countries. Fewer respondents in France and Germany (12% and 17% respectively), claimed to access the internet using a connected TV. Figure 1.12 shows overall connected TV take-up, which is significantly higher than those who use connected TVs to access the internet.

In all the comparator countries, laptops and netbooks remain the most popular devices through which to access the internet. The country with the highest proportion of respondents accessing the internet via a laptop or netbook was Germany (92%), while the lowest proportion was in Japan (84%). This relatively low proportion might be due to a number of factors including the advanced functionality of feature phones, historically popular in Japan.

Figure 6.17 Fixed devices used to access the internet



Source: Ofcom consumer research September-October 2015
 Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
 Q.7a Which of the following devices do you use to access the internet?

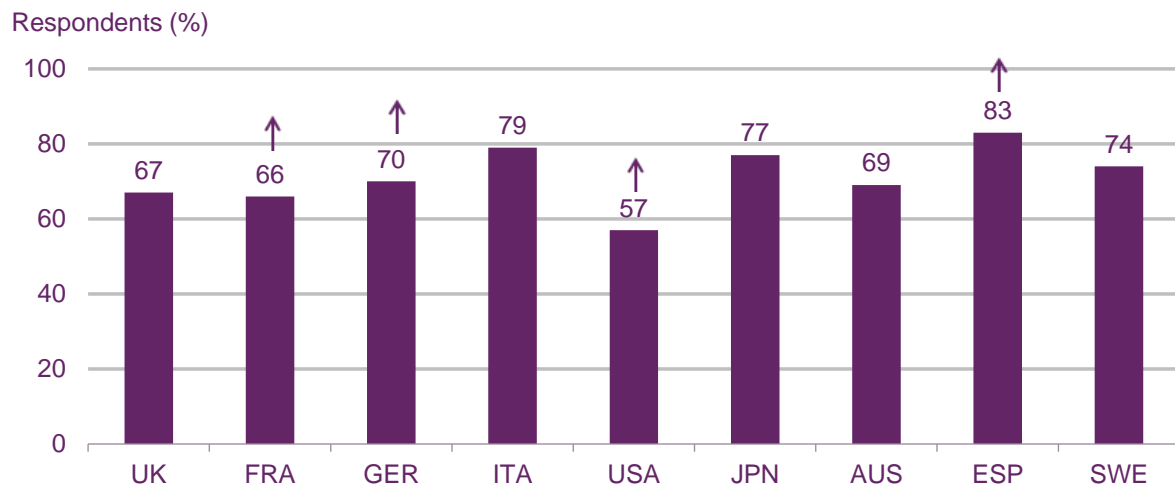
Spain leads in smartphone take-up, while in the UK over two-thirds of respondents claim to have smartphones

The country with the highest take-up of smartphones was Spain, at 83%, followed by Italy (79%) and Japan (77%).

Just over two-thirds of respondents in the UK (67%) claimed to use a smartphone.

Across the majority of the comparator countries, two-thirds of people personally use a smartphone; smartphone use has increased significantly year on year in four of the nine comparator countries, and in no country was there a decline in take-up.

Figure 6.18 Take-up of smartphones



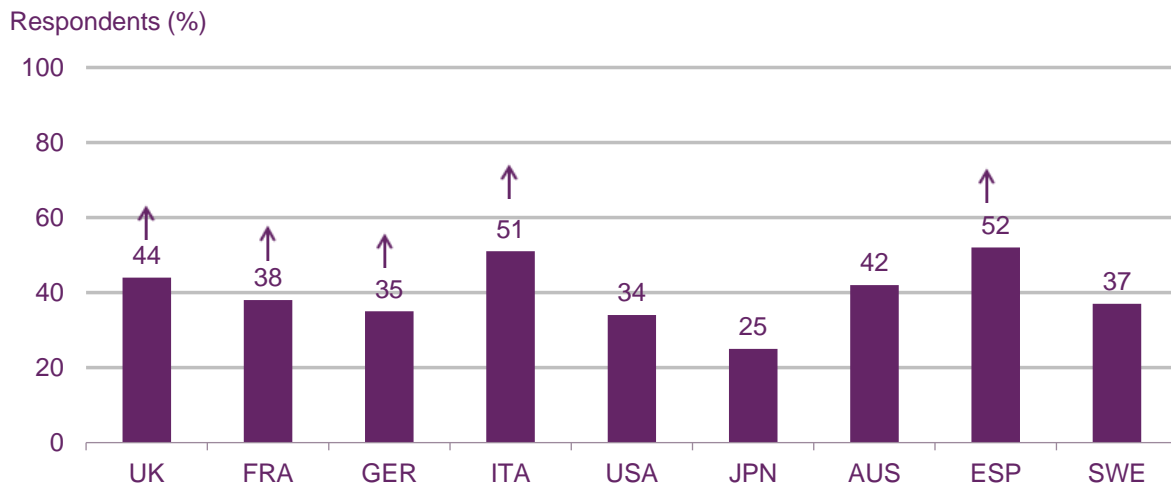
Source: Ofcom consumer research September-October 2015
 Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
 Q.4a Which of the following devices do you personally use?
 Note: Direction of arrow indicates a statistically significant difference compared to last year.

Take-up of tablets has grown in the majority of comparator countries

In five of the nine comparator countries, the use of tablets has grown significantly year on year. Spain had the highest proportion of tablet users, at 52%. The UK was one of five countries in which the use of tablets increased; up by 44%. Tablet use was also common in Australia, with 42% of respondents claiming to personally use one.

Fewer respondents claimed to use tablets in the US, at 34%, and less still in Japan (25%).

Figure 6.19 Personal use of tablets



Source: Ofcom consumer research September – October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

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

Note: Direction of arrow indicates a statistically significant difference compared to last year.

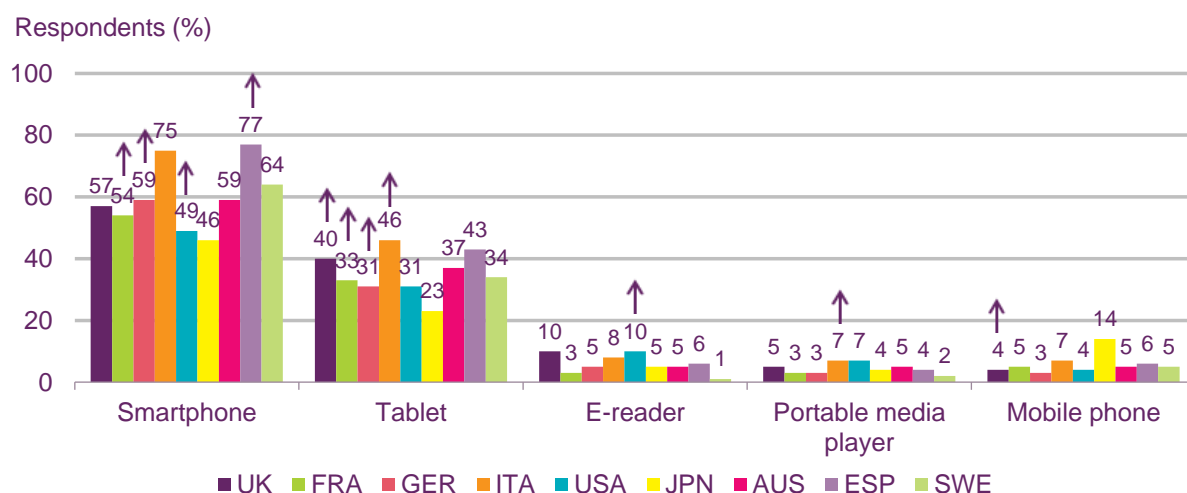
Internet users in Spain and Italy are the most likely to use a smartphone or tablet, of all portable devices

Ofcom research conducted in October 2015 found that out of all portable devices, smartphones and tablets were most commonly used to access the internet. Few people in any of the comparator countries used other portable devices, such as e-readers, portable media players and mobile phones (feature phones that aren't smartphones) to access the internet.

The only exception was Japan, where 14% of respondents accessed the internet through a mobile phone. In contrast, access via a smartphone in Japan was among the lowest (46%) of the comparator countries. This is most likely due to the advanced functionality and historical popularity of feature phones in Japan.

Spain (77%) and Italy (75%) lead among our comparator countries, in having the largest proportion of respondents using a smartphone to access the internet. In the proportion of those using a tablet to access the internet, the UK was third (40%), behind Spain (43%) and Italy (46%).

Figure 6.20 Portable devices used to access the internet



Source: Ofcom consumer research September – October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

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

Note: Direction of arrow indicates a statistically significant difference compared to last year.

6.2.5 Time spent online

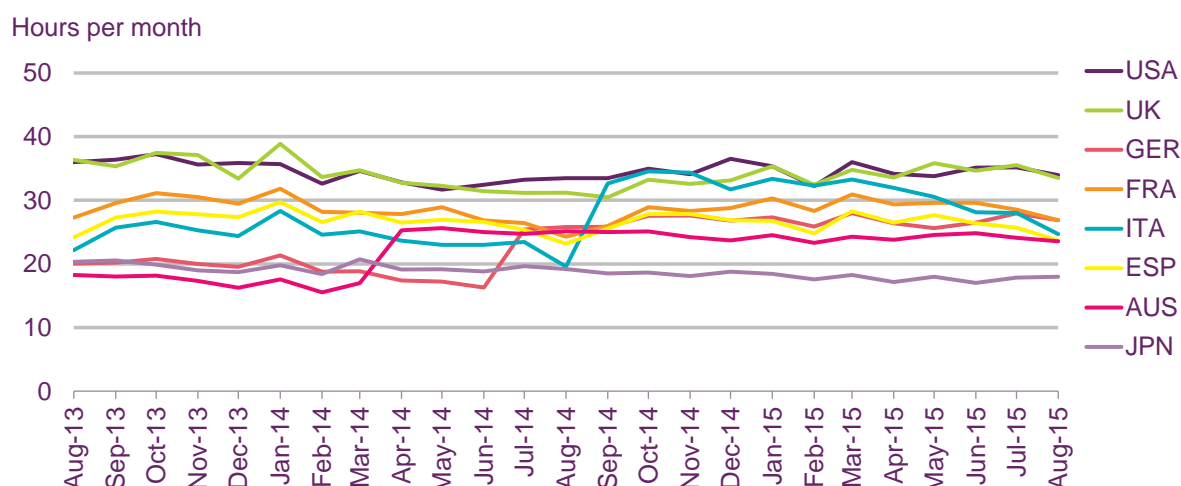
Users in the UK and the US spend the most time browsing on laptop and desktops

Internet users in the UK and the US spent the most time browsing online on a laptop or desktop computer in August 2015 (Figure 6.21), at approximately 33 and 34 hours per month respectively. In August 2014, France ranked third for time spent browsing on laptop and desktop devices, 6.9 hours behind the UK. In August 2015, France was third again, and 6.6 hours behind the UK, indicating a slight narrowing.

In all of our comparator countries except Japan and Australia, there was a year-on-year increase to August 2015 in time spent browsing on a laptop or desktop computer. Time spent in Japan fell by 1.2 hours, to 18 hours, while in Australia it fell by 1.6 hours, to 24 hours per month.

Most of the European comparator countries analysed since 2013 follow a seasonal pattern of internet use, with browsing increasing in the autumn to a peak in January, before falling again as summer approaches.

Figure 6.21 Average time spent browsing on a laptop or desktop computer



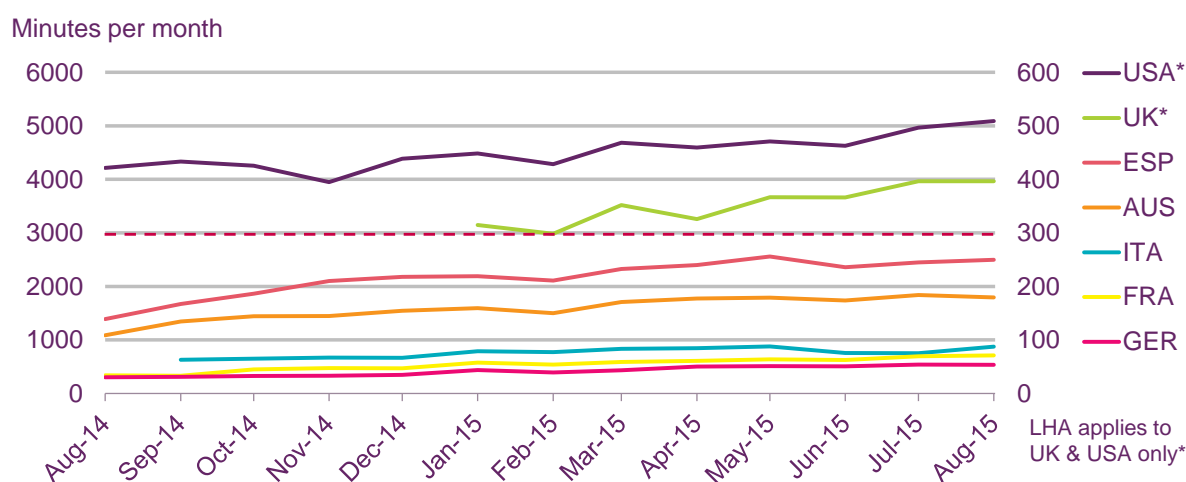
Source: comScore MMX, work and home panel, August 2013 to August 2015, persons 15+
 Note: Comparisons between data before and after January 2013 in the UK, March 2013 in the US, and July 2013 in France, Spain and Italy should be treated with caution due to a change in panel weighting methodology. Changes in comScore methodology occurred in September 2014 for Italy, in July 2014 for Germany and in April 2014 for Australia. Data before these dates should be treated with caution and should not be compared directly with current data.

US smartphone owners spend 85 hours browsing per month, while UK smartphone owners spend 66 hours

In the UK, smartphone owners spent, on average, 66 hours 6 minutes browsing in August 2015. In the US, time spent was higher, at 84 hours 50 minutes.

The US and the UK methodologies include data from a smartphone panel and therefore data cannot be compared with other featured countries. Among the other comparator countries, Spain had the highest time spent, at 4 hours 10 minutes in August 2015, while Germany had the lowest, at 53 minutes.

Figure 6.22 Average time spent browsing on a smartphone



Source: comScore Mobile Metrix, August 2014 to August 2015 (where available), adults 18+, browsing and application combined.

Note: *Mobile Metrix in the US and the UK is supplemented by panel data and should not be directly compared with the remaining comparator countries which have a related but different methodology. LHA denotes Left hand axis.

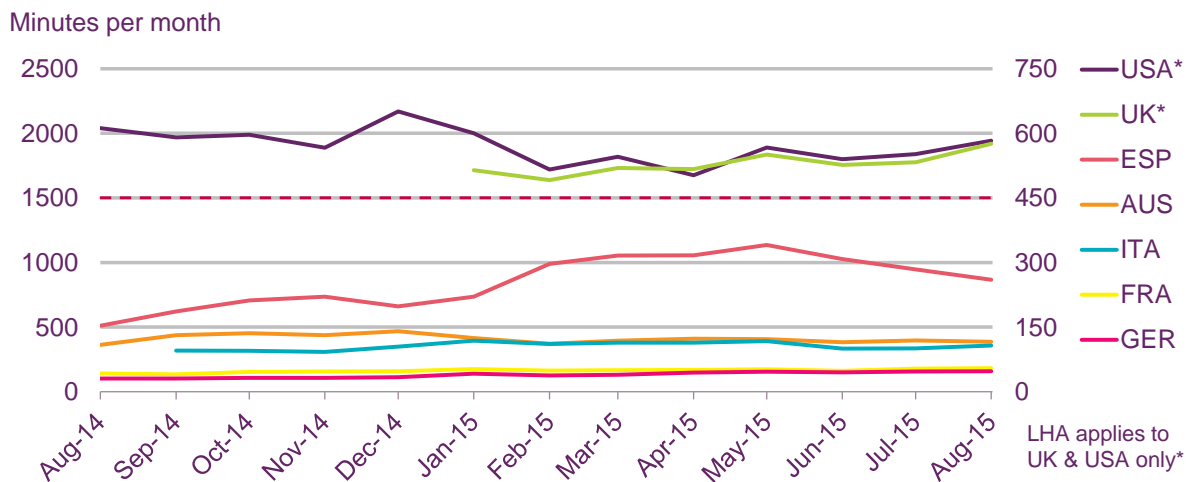
UK tablet users spend nearly 32 hours per month browsing

In the UK in 2015, tablet users spent an average of nearly 32 hours browsing the internet in August 2015. This was slightly exceeded by US tablet users, who spent over 23 minutes longer browsing in the same month.

The US and the UK methodologies include data from a tablet panel and therefore data cannot be compared with other featured countries.

Among the other comparator countries, excluding the UK and the US, Spain had the highest browsing time, at 4 hours 20 minutes in August 2015. The tablet users who spent the least time browsing were in Germany (at 48 minutes per month).

Figure 6.23 Average time spent browsing on a tablet



Source: comScore Mobile Metrix, August 2014 to August 2015 (where available), persons 18+, browsing and application combined.

Note: *Mobile Metrix in the US and the UK is supplemented by panel data and should not be directly compared with the remaining comparator countries which have a related but different methodology. LHA denotes left hand axis.

6.3 Online content

6.3.1 Introduction

This section explores the kinds of content and services that people access on the internet.

- Section 6.3.2 gives an overview of the activities people undertake on the mobile internet, and highlights the most popular web properties across eight of our comparator countries.
- Section 6.3.3 considers which apps are most popular in each of our comparator countries.
- Section 6.3.4 focuses on search, including the leading search engines, and the most popular and fastest-rising search terms in the past year.
- Section 6.3.5 looks at the take-up of social networking using different devices, the popularity of social networking sites, and the use of check-in services.
- Section 6.3.6 looks at the reach of online video sites, the popularity of different services across platforms, and the type of online video consumed.
- Section 6.3.7 examines the use of the internet for the consumption of news services.
- Section 6.3.8 explores the use of online banking services.

Key findings

In summary, the key findings from this section of the chapter are:

- **Social networking, instant messaging and gaming apps are the most commonly downloaded on iPhone and Google Play across comparator countries.** On iPhone, WhatsApp Messenger was the most downloaded app in Spain, Singapore, Brazil, India and Nigeria. On Google Play, Facebook was the most downloaded app in the UK, France, Germany, Australia, Poland and Nigeria. On both iPhone and Google Play, at least one gaming app featured in twelve countries' top five most downloaded apps.
- **Google is the most popular search engine across all of the comparator countries.** In 2014, Google was the most popular search engine across all comparator countries except Japan. As Yahoo! Search's active reach in Japan declined substantially year-on-year to August 2015, Google became the most popular search engine.
- **The UK has the highest proportion of mobile phone users who access social networks on that device almost every day (43%), along with the US (42%).** Japan has the lowest number of respondents to access social networks on a mobile phone almost every day, at 9%.
- **Online banking on a smartphone is most popular in Australia and Sweden, followed by the UK.** Half of smartphone owners in Australia and Sweden, and 40% of smartphone owners in the UK, use their device to bank online.

6.3.2 Overview

Among laptop and desktop users, Google-owned sites were the most popular across all of the comparator countries in August 2015.

A handful of web properties were popular with internet users across all the comparator countries. 'Microsoft sites' appeared in the top ten for every one of our comparator countries, while Yahoo sites featured in the top ten for all except Germany¹³⁴. In every comparator country, Google-owned sites were the most popular.

The popularity of online shopping was also evident: Amazon appeared in the top ten in every country except Australia, while eBay appeared in the top ten of every country apart from Spain and Japan¹³⁵. In Japan, Rakuten was listed, which runs Rakuten Ichiba, one of the largest e-commerce sites in Japan.

The top ten properties on laptops and desktops indicated the popularity of social networking, with Facebook featuring in the top five properties in all the comparator countries except Japan, where it was the ninth most popular property. Wikimedia Foundation Sites - which include Wikipedia - were also popular across countries, appearing in the top ten properties for the majority of our comparator countries, but not in France or Japan.

Alongside these global web properties were popular national websites, such as the BBC in the UK, and CBS in the US. These websites provide regional written and audio-visual content such as news, sport and entertainment. In France, Webedia produces several popular websites under its 'pure' brand. Purepeople, for example, is a popular celebrity news site. CCM-Benchmark's brands include the CCM technology websites, and features the website L'internaute.

A number of media groups and multimedia publishing groups appear among the top ten web properties, such as Axel Springer (which publishes Bild, a German tabloid newspaper), Prisa in Spain and NewsCorp in Australia.

¹³⁴ Yahoo! Japan's largest shareholders are Softbank and Yahoo! Inc, making Yahoo! Japan distinct.

Figure 6.24 Top ten web properties accessed on a laptop and desktop computer, by country

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP
1	Google Sites -	Google Sites -	Google Sites -	Google Sites -	Google Sites -	Google Sites -	Google Sites -	Google Sites -
2	Microsoft Sites +1	Facebook +1	Facebook -	Facebook -	Facebook +2	Yahoo Sites -	Microsoft Sites -	Facebook -
3	Facebook -1	Microsoft Sites -1	Microsoft Sites +2	ItaliaOnline -	Yahoo Sites -1	Microsoft Sites +1	Facebook -	Microsoft Sites -
4	Amazon Sites +1	CCM-Benchmark +1	Amazon Sites -1	Microsoft Sites +1	Microsoft Sites -1	FC2 inc. -1	Yahoo Sites -	Unidad Medios Digitales -
5	BBC Sites +1	Webedia Sites -1	eBay -1	Banzai +1	Amazon Sites +1	LINE Corporation N	News Corp Australia N	Prisa +2
6	eBay +1	Yahoo Sites -	Axel Springer SE -	Wikimedia Foundation Sites +1	AOL, Inc. -1	DMM +2	TripAdvisor Inc. N	Yahoo Sites -
7	Yahoo Sites -3	Orange Sites -	Deutsche Telekom -	Amazon Sites +3	Mode Media -	Amazon Sites -	Wikimedia Foundation Sites -1	Vocento +1
8	Wikimedia Foundation Sites -	Schibsted Media Group -	Hubert Burda Media +1	eBay -	Wikimedia Foundation Sites N	Rakuten Inc -2	eBay -3	Schibsted Media Group +1
9	TripAdvisor Inc. N	Amazon Sites N	United-Internet Sites -1	Yahoo Sites -5	CBS Interactive -	Facebook N	Mode Media N	Amazon Sites N
10	Apple Inc. -1	Solocal Group -1	Wikimedia Foundation Sites -	Gruppo Editoriale Espresso N	eBay -2	Kadokawa Dwango Corporation N	Telstra Corporation Limited -2	Alibaba.com Corporation N

Source: comScore MMX, home and work panel, August 2014 and August 2015, persons 15+. Note: Coloured font indicates brand appears more than once. Web property audience includes relevant internet application audiences where available. A '+' or '-' number denotes change in rank since 2014 comScore data, '-' only denotes no change, and 'N' denotes a new entrant to the top ten.

On mobile phones, media groups and Yahoo sites were among the most popular properties

On mobile phones, Google sites were significantly less popular than on laptop and desktop computers, appearing in the top ten properties in two of the comparator countries. Yahoo sites, however, featured in the top ten properties in all of the comparator countries.

Media groups and multimedia publishing groups were notably popular on mobile phones. RCS MediaGroup was the top property in Italy and Spain, while Axel Spring was the third most popular property in both France and Germany. NewsCorp Australia, Trinity Mirror Group and Schibsted Media Group also featured in the top ten properties.

Some properties were popular across platforms, but were higher up the rankings for mobiles than for desktops and laptops. AOL Inc, for instance, was Japan's most popular property on mobile, featured in the top ten of two other countries. And whereas TripAdvisor featured in two of the comparator countries' top ten properties on desktop and laptop, it was in the top ten for four countries on mobile.

Conversely, some properties were less popular on mobiles than on laptops or desktops. Amazon was in the top ten most-accessed properties on a laptop or desktop in seven comparator countries, but in only three countries for mobile phone access. And eBay was among the ten most popular properties on laptops and desktops in five countries, but for mobile phones it was in the top ten only in the UK.

Figure 6.25 Top ten web properties accessed on a mobile phone, by country

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP
1	Google Sites	CCM-Benchmark	Deutsche Telekom	RCS MediaGroup	Google Sites	AOL, Inc.	News Corp Australia	RCS MediaGroup
2	Facebook	Webedia Sites	AccuWeather Sites	Yahoo Sites	Facebook	TripAdvisor Inc.	Gumtree Sites	Vocento
3	BBC Sites	Axel Springer SE	Axel Springer SE	TripAdvisor Inc.	Yahoo Sites	DAILYMOTION.COM	Yahoo Sites	Prisa
4	Amazon Sites	Groupe Amaury	Shazam Entertainment Ltd	Banzai	Amazon Sites	Indeed	BUZZFEED.COM	Mediaset España
5	Sky Sites	Shazam Entertainment Ltd	Webedia Sites	ItaliaOnline	AOL, Inc.	Rakuten Inc	Mail Online / Daily Mail	Grupo Herald
6	Mail Online / Daily Mail	Cerise Media	AOL, Inc.	Shazam Entertainment Ltd	Comcast NBCUniversal	JJI Press Ltd	AOL, Inc.	Yahoo Sites
7	Microsoft Sites	DAILYMOTION.COM	Spotify	Ciaopeople	Microsoft Sites	Yahoo Sites	Mode Media	Grupo Godo
8	Yahoo Sites	TripAdvisor Inc.	Yahoo Sites	Leonardo ADV	CBS Interactive	FASHIONSNAPE.COM	LIKES.COM	Schibsted Media Group
9	eBay	Orange Sites	TripAdvisor Inc.	Populis	Apple Inc.	Weather Company, The	9NEWS.COM.AU	Zeta Gestión De Medios
10	Trinity Mirror Group	Yahoo Sites	Xing	Gruppo Mediaset	Twitter	AccuWeather Sites	Amazon Sites	Weblogs SL Sites

Source: comScore MoMX, browser and applications (browser only in Japan), August 2015. Note: Coloured font indicates property appears more than once. Web property audience includes relevant internet application audiences where available.

6.3.3 Apps

Social networking, instant messaging and gaming apps are the most commonly downloaded on iPhone and Google Play across comparator countries.

Social networking and instant messaging apps are the most commonly downloaded on iPhone and Google Play across the comparator countries. The social networking app, Facebook, was popular in many of the comparator countries, appearing in the top five apps downloaded from Google Play in all countries except Japan, Singapore, Russia and China. In Russia, VK and its classmates (both social networking apps) were among the top five. Instant messaging apps were also popular, with both WhatsApp Messenger and Facebook Messenger (Messenger) in the top five most commonly downloaded apps in the EU5¹³⁶.

Gaming apps were commonly downloaded in many countries, and at least one gaming app featured in the top five most commonly-downloaded apps in 12 of the comparator countries. In Japan, four of the five most commonly downloaded apps were gaming apps, indicating an enthusiasm for gaming apps that significantly exceeds that in the other comparator countries.

There were notable national differences in the popularity of apps for anti-virus protection, mobile payments and e-commerce. Anti-virus security apps were popular in Germany, Italy, the US, Brazil and India. Russia was the only country to have a specific e-commerce app among its top five most downloaded (Ali Express Shopping App), and the only country to feature a mobile payments app in its top five was Sweden (Swish Payments).

¹³⁶ The EU5 comprises the UK, France, Germany, Italy and Spain.

Figure 6.26 displays the most commonly downloaded apps from Google Play (Android smartphones and tablets). In contrast, Figure 6.27 displays information relating to downloads of apps for iPhones only, excluding tablets. Consequently, they cannot be compared on an exact like-for-like basis.

Figure 6.26 Most commonly downloaded apps from Google Play, by country

	1	2	3	4	5
UK	Facebook	Heroes of the Alpha Arena	WhatsApp Messenger	Messenger	Google Photos
FRA	Facebook	Messenger	Snapchat	Google Photos	WhatsApp Messenger
GER	WhatsApp Messenger	Facebook	360 Security	Messenger	Heroes X Mortals: Kriegsarena
ITA	WhatsApp Messenger	Facebook	Messenger	360 Security	COOKING MAMA
USA	Messenger	Google Photos	Facebook	360 Security	Pandora Radio
JPN	RPG Iruna Senki online ¹	Collect the real battleship empire – 200 boats ²	Battered hero – exhilarating battle game that can be enjoyed with one finger! ³	Yahoo! Browser ⁴	Clash of Kings
AUS	Facebook	Messenger	Google Photos	Golden Lion Slots	Instagram
ESP	WhatsApp Messenger	Facebook	Messenger	Google Photos	64 Games
NED	WhatsApp Messenger	Facebook	Google Photos	Messenger	Magister 6
SWE	Legend Online	Facebook	Bank ID sakerhertsapp	Swish payments	Messenger
POL	Facebook	Messenger	Fallout Shelter	96% pop polsku	Snapchat
SGP	Pocket Q	Facebook	WhatsApp Messenger	Demons – Xinghai Wings ⁵	Messenger
KOR	Pop-up cache – essential app KakaoTalk users ⁶	Rusty Blood ⁷	CLiP ⁸	Friends Pop for Kakao ⁹	Wonder5 Masters
BRA	WhatsApp Messenger	Facebook	Messenger	Easy Audio Recorder	CM Security Antivirus AppLock
RUS	VK	WhatsApp Messenger	AliExpress Shopping App	Viber	Classmates ¹⁰
IND	WhatsApp Messenger	Facebook	Messenger	SHAREit	360 Security
CHN	Google Play Games	Youtube	Google Photos	Instagram	Chrome Browser
NIG	Facebook	WhatsApp Messenger	Messenger	BBM	Instagram

Source: App Annie Top App Charts Aug 31, 2015. Translation notes: 1. イルーナ戦記オンライン2. 戦艦帝国-200艘の实在戦艦を集めろ3. 連打英雄—指1本で楽しめる爽快バトルゲーム4. Yahoo!ブラウザ5. 伏魔者-星海之翼资料片来袭6. 팝업캐시 - 카카오톡 사용자 필수앱 7. 러스티블러드 8. A mobile wallet service 9. 프렌즈팝 for Kakao 10. Одноклассники. Note: coloured font indicates an App that appears in the top five most commonly downloaded apps in five or more countries.

The popularity of social networking and instant messaging apps was mirrored among iPhone users. In all the comparator countries except Japan, the top five most commonly downloaded apps included at least one social networking or instant messaging app, and in most cases both.

At least one gaming app featured in the top five most popular apps in 12 countries. A greater enthusiasm among iPhone users for gaming apps might be inferred from the popularity of apps such as *Happy Wheels* and *The Walking Dead: Road to Survival*. However, as data on the most commonly downloaded apps are collated on a daily basis, the popularity of certain gaming apps might be attributable to daily trends.

Figure 6.27 Most commonly downloaded iPhone apps, by country

	1	2	3	4	5
UK	Happy Wheels	WhatsApp Messenger	The Walking Dead: Road to Survival	Messenger	Facebook
FRA	The Walking Dead: Road to Survival	Happy Wheels	WhatsApp Messenger	Messenger	iMusic Pro
GER	Happy Wheels	WhatsApp Messenger	The Walking Dead: Road to Survival	iMusic Pro	Messenger
ITA	Happy Wheels	WhatsApp Messenger	Messenger	Layout from Instagram	Jusapp – Prank Calls
USA	Happy Wheels	The Walking Dead: Road to Survival	Messenger	Facebook	Instagram
JPN	Happy Wheels	Pokemon Shuffle Mobile	Pirates of war ¹	SUUMO	LINE
AUS	Happy Wheels	Messenger	Layout from Instagram	Facebook	Instagram
ESP	WhatsApp Messenger	Layout from Instagram	Messenger	Instagram	Facebook
NED	Buienradar	Buienalarm	Happy Wheels	Magister 6	WhatsApp Messenger
SWE	Happy Wheels	Swish payments	Bank ID sakerhertsapp	Layout from Instagram	Geocoaching Intro
POL	Messenger	Yeah Bunny Keyboard	Facebook	Youtube	96% pop polsku
SGP	WhatsApp Messenger	Pokemon Shuffle Mobile	Messenger	Layout from Instagram	Youtube
KOR	Friends Pop for Kakao ²	DomiNations Asia	Collection Ittok 4.0 ³	Piano Tiles 2	KakaoTalk
BRA	WhatsApp Messenger	Layout from Instagram	iMusic Pro	Messenger	Facebook
RUS	Layout from Instagram	Music for iPhone and playlists	WhatsApp Messenger	Sberbank online ⁴	VK
IND	WhatsApp Messenger	Facebook	SHAREit	Truecaller	Messenger
CHN	PIP Camera	Lending treasure – acquaintances borrowing money become contacts, easy money ⁵	National Super God – the world's first real-time MOBA gaming 5V5 hand tour ⁶	Ski Adventure 2 – 3D multiplayer version Parkou ⁷	Mango TV – see the good old days ⁸
NIG	WhatsApp Messenger	Instagram	Facebook	BBM	Messenger

Source: App Annie Top App Charts Aug 31, 2015. Translation notes: 1. 戦の海賊 2. 프렌즈팝 for Kakao 3. 코레일톡4.0 4. Сбербанк Онлайн 5. 借贷宝 – 熟人借贷, 人脉变钱脉, 轻松玩出钱 6. 全民超神-全球首款5V5实时MOBA电竞手游 7. 滑雪大冒险2 -- 3D版多人对战跑酷 8. 芒果TV - 看见好时光.
Note: coloured font indicates an app that appears in the top five most commonly downloaded apps in five or more countries.

6.3.4 Search

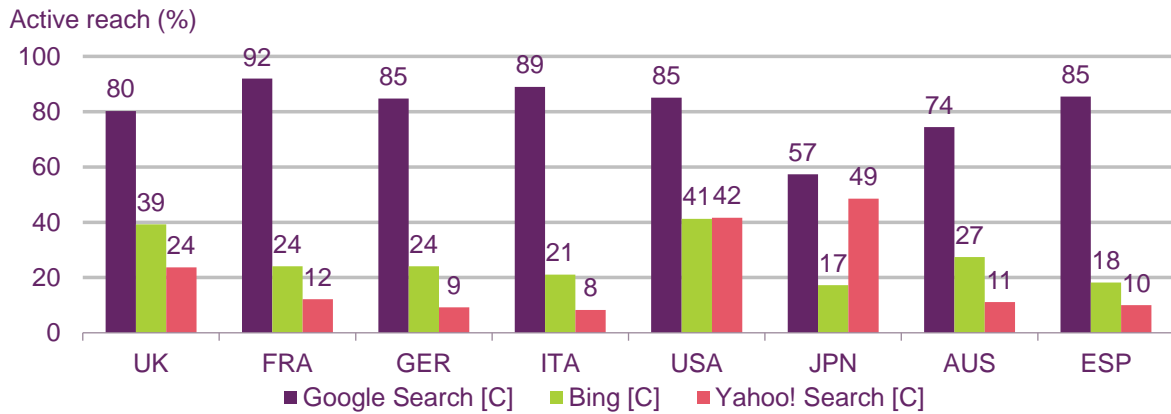
Google is the most popular search engine across the EU5 countries, the US, Australia and Japan

Google was the most popular search engine across all of the comparator countries analysed in Figure 5.20. Google's active reach was significantly greater than its competitor search engines in all countries except Japan, where Yahoo Search! has an active reach only 8% behind Google Search.

Between August 2014 and August 2015 there was a decline in the active reach of Yahoo! Search in all the comparator countries except Germany, where it remained stable at 9%. Bing is now more popular than Yahoo! Search in all the comparator countries except Japan and the US.

Despite the strong history of Yahoo! In Japan, the active reach of Google Search is now greater than Yahoo! Search. In the year to August 2015, the active reach of Yahoo! Search decreased by 20 percentage points, to 49%.

Figure 6.28 Active reach of selected search engines on laptop and desktop computers



Source: comScore MMX, home and work panel, August 2015, persons 15.

Online brands such as Facebook and Google were the most searched-for terms online in the majority of our comparator countries

The most popular search term on Google for 11 of our 18 comparator countries in the year to August 2015 was ‘Facebook’. However, Facebook appeared to be less popular in Russia, where Russian social networks ‘Odnoklassniki’ and ‘VKontakte’ were two of the top three most searched-for terms.

Country-specific search terms remained popular, such as ‘BBC’ in the UK, and ‘bon coin’, the classified listings website, in France. In Nigeria and Singapore, the name of the country itself featured among the three most common search terms, possibly used in addition to other search terms as a way of narrowing the results returned by Google to those more relevant to the respective country.

The search terms which increased in popularity the most varied, but there was a notable increase since 2014 in terms related to geopolitical matters and current affairs. In 2014 many of the most popular search terms were related to the World Cup. But in 2015 ‘Charlie Hebdo’ had the largest increase in France, ‘ebola’ in the US and ‘ISIS’ in Italy. In Singapore, ‘Lee Kuan Yew’ (the name of country’s first and longest-serving prime minister) was the search term that increased most, and in Nigeria it was ‘Buhari’, the name of the nation’s president, elected in 2015.

Figure 6.29 Most popular search terms on Google: August 2014 - August 2015

Country	1 ST	2 ND	3 RD	Largest increase
UK	facebook	bbc	google	showbox
FRA	facebook	youtube	bon coin	charlie hebdo
GER	facebook	google	ebay	kalendar 2015
ITA	facebook	youtube	google	isis
USA	facebook	google	you	ebola
JPN	weather ¹	image ²	youtube	monster hunter 4g ³
AUS	facebook	google	youtube	netflix
ESP	facebook	youtube	hotmail	gran hermano
NED	facebook	google	youtube	popcorn time
SWE	google	facebook	youtube	windows 10
POL	facebook	onet	allegro	olx
SGP	singapore	google	youtube	lee kuan yew
KOR	naver ⁴	torrents ⁵	Net mingki ⁶	angel tv ⁷
BRA	facebook	google	Youtube	bbb15
RUS	vc ⁸	classmates ⁹	yandex ¹⁰	Okay google ¹¹
IND	facebook	video	song	sarkari result
CHN	google	baidu ¹²	grass pomegranate ¹³	youtube
NGA	news	nigeria	download	buhari

Source: Google Insights Search Tool, August 2014 to August 2015. Translation notes: 1. 天気 2. 画像 3. モンハン 4g 4. 네이버 5. 토렌트 6. 밍키넷 7. 천사티비 8. vk 9. Одноклассники 10. яндекс 12. окей google 12. 百度 13. 草榴. Note: orange font indicates 'breakout' status – where the frequency with which a term is searched has increased by >5000%.

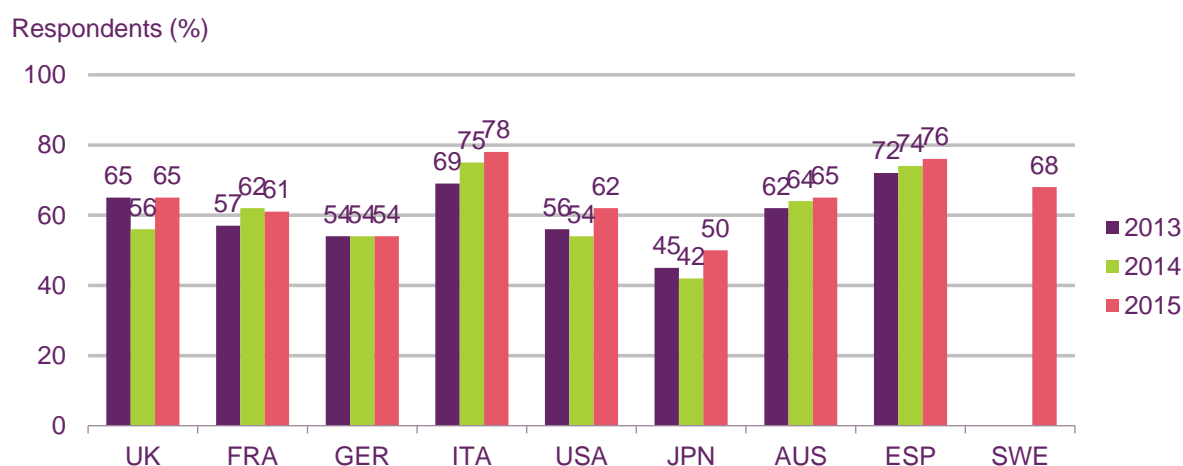
6.3.5 Social networking

Italy and Spain have the highest proportions of people accessing social networking sites weekly

The majority of internet users accessed social networks on a weekly basis in almost all of our comparator countries. The most active social networkers were in Italy and Spain, where three-quarters of internet users accessed social networks at least once a week.

In the majority of the comparator countries, the proportion of weekly social networkers increased from October 2014 to September-October 2015. Year on year, the proportion of weekly social networkers in Germany has been broadly stable since 2013 (54%). In the UK, nearly two-thirds of people claimed to access social networking sites weekly (65%).

Figure 6.30 Weekly access to social networks



Source: Ofcom consumer research September – October 2015, October 2014 and September 2013. Base (2015): All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

2013-14 Q.8 Which, if any, of the following activities do you use your internet connection for at least once a week?

2015 Q.8 How often do you use an internet connection on any of your devices for each of the following activities? 5. Accessing social networking sites (e.g. Facebook, Twitter) <At least once a week>

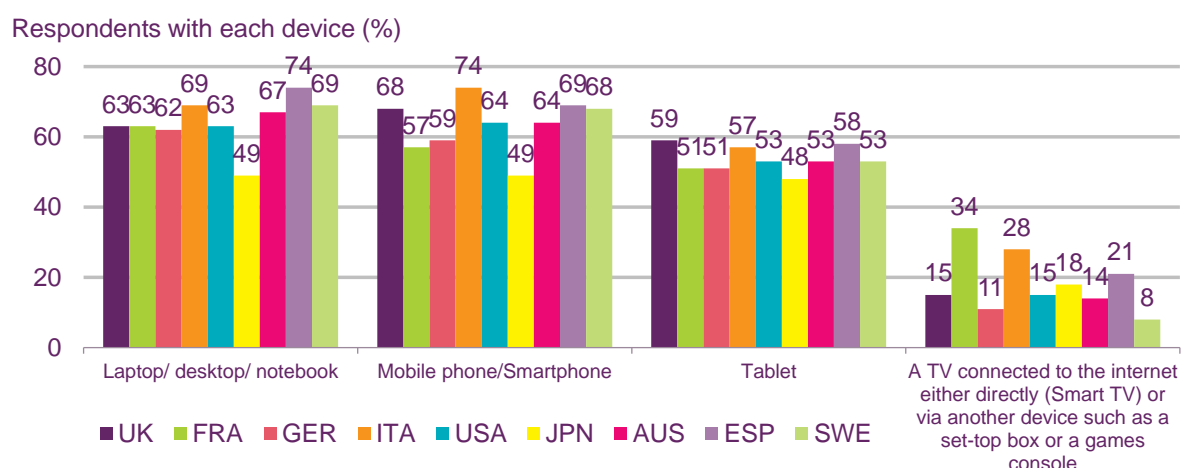
Laptops/desktops and mobile phones are the most popular devices for accessing social networks

Across nearly all the comparator countries, smartphones/ mobiles and laptops/ desktops/ notebooks were the most popular devices for accessing social networks. This was the case in all comparator countries except Japan, where tablets have a similar level of popularity (48% tablet, 49% mobile/smartphone, 49% laptop/desktop/notebook) as a device for accessing social networks.

Italy had the highest proportion of social networkers on smartphones/ mobiles, with 74% of those who owned a smartphone/ mobile phone claiming to have used it to access social networks. In the UK, around two-thirds of respondents with each device type accessed social networks using a laptop/ desktop /notebook (63%), and mobile phone/ smartphones (68%).

In France, over a third of people (34%) accessed social networks using a TV with internet connectivity (directly with a smart TV or via a device such a set-top box), compared to 15% in the UK.

Figure 6.31 Accessing social networks, by device ownership



Source: Ofcom consumer research September - October 2015

Base: All respondents who access internet with each type of device, UK=879/594/398/235, FRA=913/568/335/122, GER=923/623/318/176, ITA=876/779/460/185, USA=904/523/319/195, JPN=840/573/234/98, AUS=906/610/370/191, ESP=897/803/435/194, SWE=879/678/343/213 Q.9a Which, if any, of the following internet activities do you use each of your devices for?

Social networking is most popular among 18-24s in the majority of comparator countries

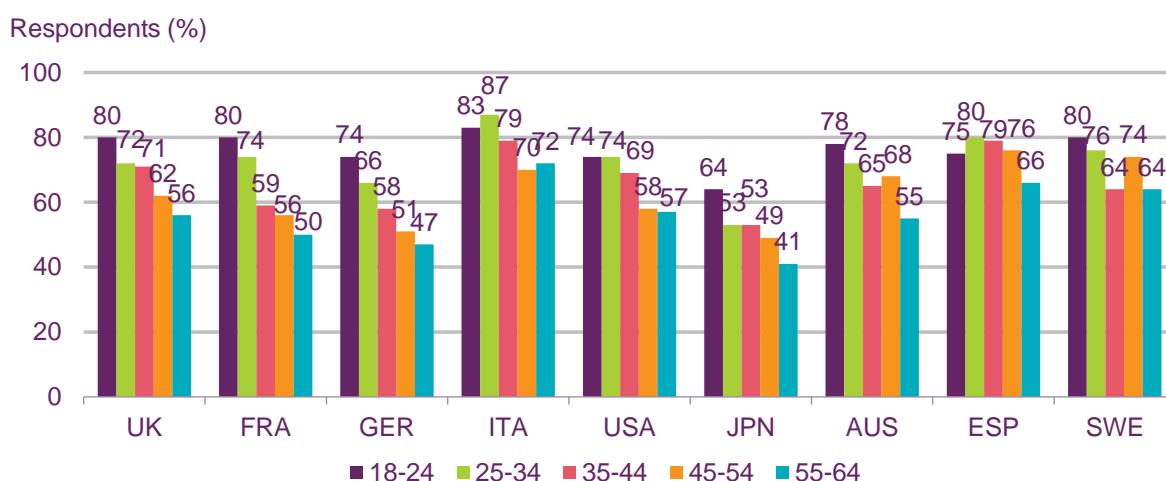
In the UK, as in most other comparator countries, people aged between 18 and 24 are the most likely to use social networks at least weekly, compared with other age groups. Social networking is most popular among 18-24s in six of the nine comparator countries. In Italy and Spain, social networking is more popular among 25-34s, used by 87% and 80% respectively in that age group at least weekly.

Japan had the lowest weekly use of the internet to visit social networks, across all age groups. This reflects the relatively low active reach of sites such as Facebook in Japan relative to other comparator countries (Figure 6.28).

In Italy, use of social networks at least once a week among 55-64s was notably greater, at 72%, than in other comparator countries. And 25 to 34 year olds in Italy were the most active social networkers across all age groups and countries.

The country with the greatest difference between age groups in weekly use of social networks was France, with a 30 percentage point difference between the 18-24s and the 55-64s.

Figure 6.32 Weekly use of internet connection to visit social networks, by age



Source: Ofcom consumer research September - October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

Q.8 How often do you use an internet connection on any of your devices for each of the following activities? <At least once a week>

Facebook is by far the most popular social network in all of our comparator countries, apart from Japan, where it has a more modest lead

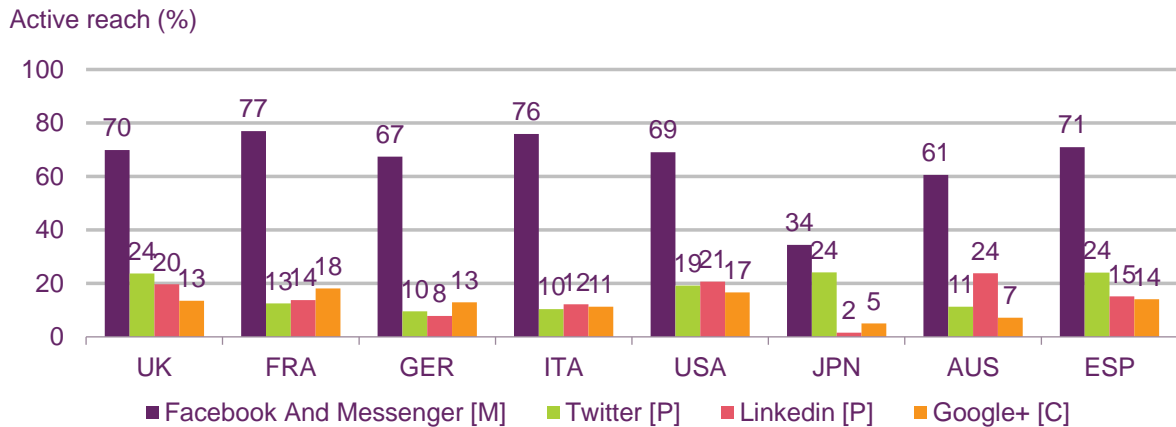
On laptops and desktops, Facebook was the most popular social network - by a significant margin - in seven of the eight comparator countries shown in Figure 6.33. Of these countries, Facebook was most popular in France, where 77% of respondents accessed it at least once in August 2015 on a laptop or desktop computer. Italy (76%), Spain (71%) and the UK (70%) were among the countries where the active reach of Facebook in August 2015 was at least 70%.

Japan was the only country where the difference in active reach between Facebook and its competitors was more modest; 34% compared to 24% for Twitter. Since August 2014, Facebook's active reach in Japan has increased by 9%, while Twitter's has fallen by 6%¹³⁷. The active reach of Facebook in August 2015 was significantly lower in Japan (34%) than in the other comparator countries, where Facebook's active reach ranged from 61% to 77%

There was no consistent second-place social network across the comparator countries. In the UK, Japan and Spain, Twitter was in second place, with a 24% active reach in all three countries. The professional-oriented social network, LinkedIn, was the second most popular social network in Australia (24%), the US (21%) and Italy (12%). Only in France (18%) and Germany (13%) was Google+ the second most popular social network.

¹³⁷ [P] Facebook has been used to measure the change in reach, whereas in Figure 6.33. Facebook and Messenger is used. Similarly, Twitter.com is used to measure change, but [P] Twitter is used in Figure 6.33.

Figure 6.33 Active reach of selected social networks on laptop and desktop computers



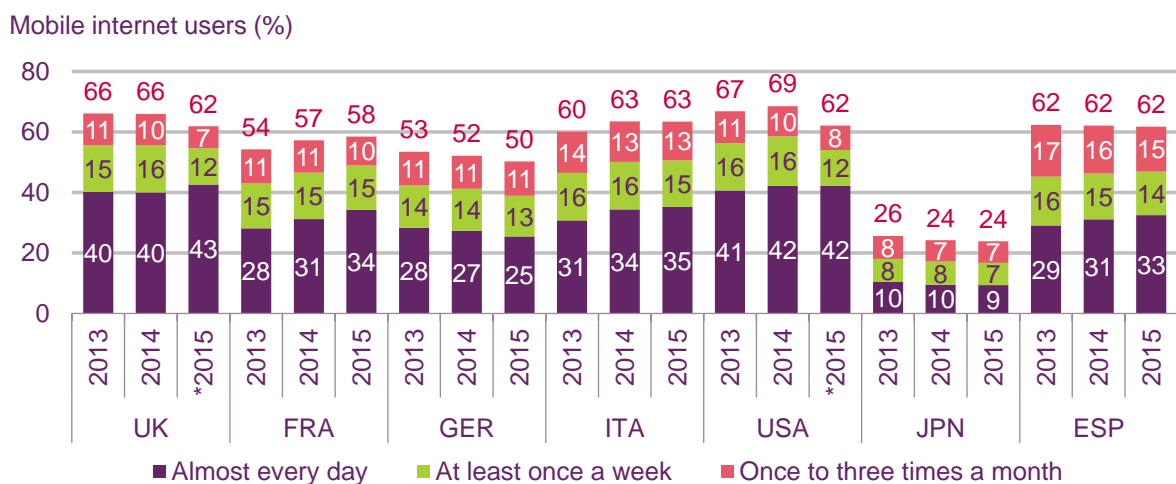
Source: comScore MMX, home and work panel, August 2015, persons 15+

The UK has the highest proportion of mobile phone users who access social networks on that device almost every day (43%), along with the US (42%).

Japan has the lowest number of respondents to access social networks on a mobile phone at least once a month, at 24%. The prevalence of feature phones in Japan - some of which might not have the functionality required to access social networks - might explain why fewer Japanese mobile phone users access social networks.

Spain had the highest proportion of mobile phone users accessing social networks between one and three times a month, at 15% of respondents. France and Italy had the highest proportion of mobile phone users accessing social networks at least once a week (but less than 'almost every day'), at 15%.

Figure 6.34 Monthly access to social networks on mobile phones



Source: comScore MobiLens, August 2013 (three-month average), August 2014 (three-month average), and August 2015 (three-month average), mobile internet users aged 13+ Note: *For August 2015 (three-month average) UK and USA results are from comScore MobiLens Plus which includes an additional response of 'Used before but not in the month' of 5% for both countries.

6.3.6 Online video

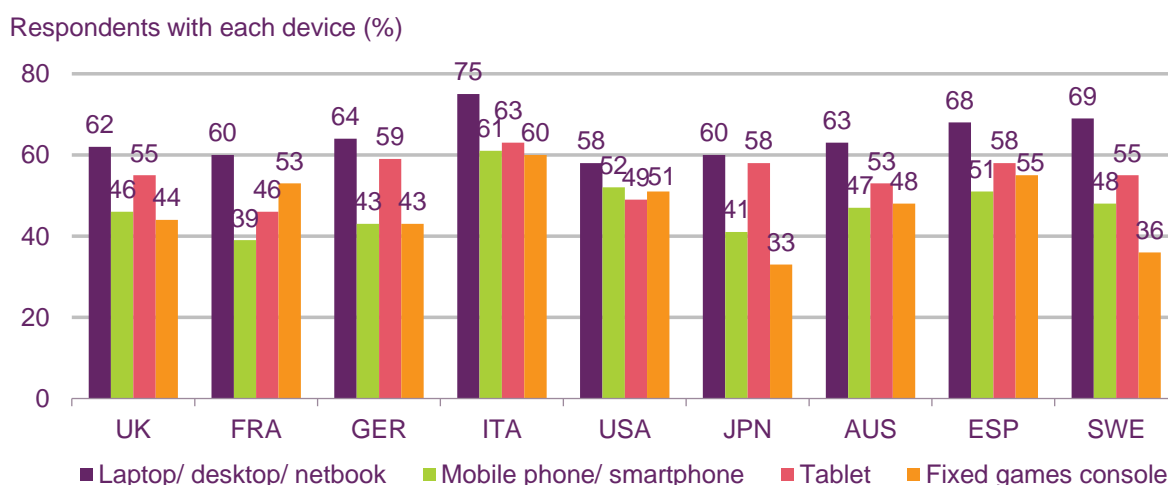
This analysis looks at web-based video, which is defined as free videos or video clips on websites that are accessible using a browser or the website’s application¹³⁸. Information relating to long-form video content can be found in the TV and AV chapter of this report.

Accessing the internet to watch video clips on tablets and computers increased in popularity in the UK in 2015

In the UK, the proportion of tablet owners using their device to watch video clips over the internet increased year on year by 8% (to 55%), while the proportion watching on their computers also increased by 8% (to 62%).

In Italy, 75% of computer owners, and 63% of tablet owners, claimed to view online video clips through each of these types of device in 2015 – the highest among the comparator countries. Watching video clips on a mobile or smartphone was also most popular in Italy, at 61%.

Figure 6.35 Accessing online video clips, by device ownership



Source: Ofcom consumer research September - October 2015

Base: All respondents with each device, laptop/desktop/netbook=840-923 in each market, mobile phone/smartphone=523-803 in each market, tablet computer=234-460 in each market, games console attached to TV=98-235 in each market (Japan* - Caution low base size less than 100).

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

YouTube was visited by at least half of all laptop and desktop users in the majority of the comparator countries

In five of the eight comparator countries, YouTube was visited by at least half of all laptop and desktop users at least once in August 2015 (Figure 6.36). YouTube was most popular in Spain, with 60% of its laptop and desktop users visiting the website at least once a month. Across all comparator countries, YouTube was significantly more popular than any of our other selected online video websites. YouTube’s narrowest lead in August 2015 was in France, where 23% of internet users visited Dailymotion, a French video-sharing website with global reach, compared with 52% of users who visited YouTube.

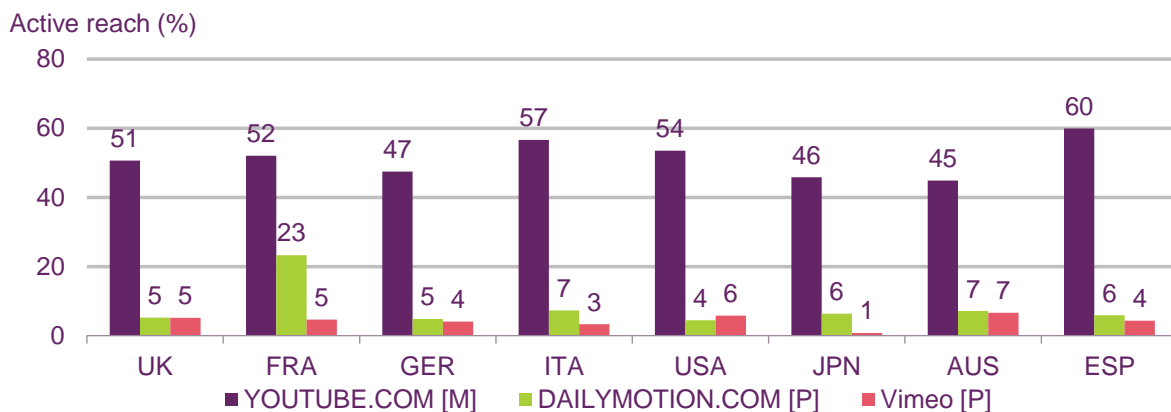
The proportion of laptop and desktop computers accessing YouTube at least once a month declined in all eight comparator countries. The greatest year-on-year decline to August 2015

¹³⁸ This excludes video on demand services such as BBC iPlayer and Netflix.

was in the UK and in Australia; seven percentage points lower in both countries. This is likely to be because online video consumption is shifting from fixed laptop and desktop devices to tablet and mobile devices.

No single selected online video website was consistently the second most popular after YouTube. In the UK and Australia, Dailymotion and Vimeo were tied on 5%. Dailymotion was second most popular in France (23%), Italy (7%), Japan (6%) and Spain (6%). Vimeo was the second most popular online video website in only one country; the US (6%), its country of origin.

Figure 6.36 Active reach of selected online video websites on laptop and desktop computers



Source: comScore MMX, home and work panel, August 2015, persons 15+

6.3.7 Online news

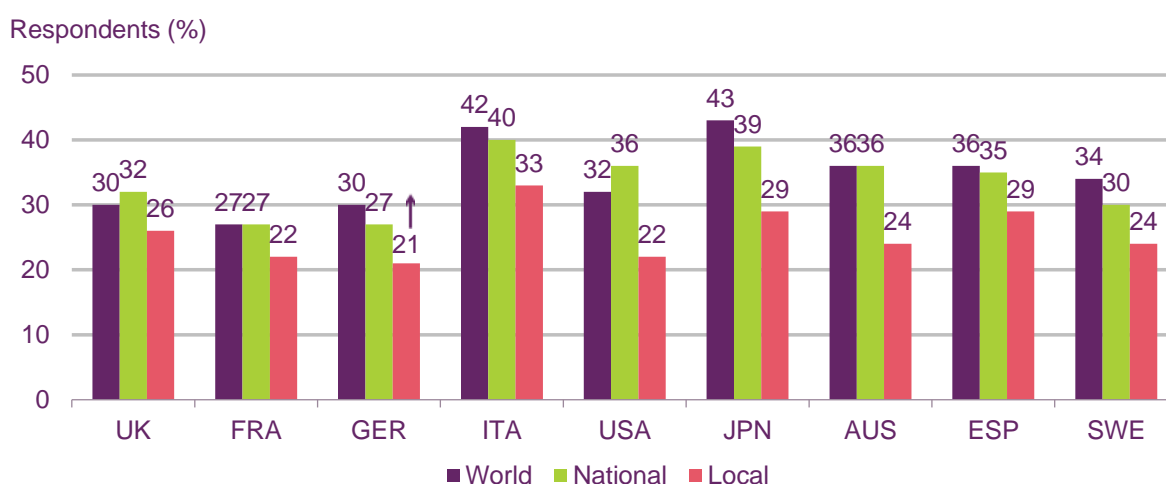
Internet users in Japan and Italy are the most likely to regard the internet as their main source of news

Internet users in Japan (43%) and Italy (42%) were the most likely to regard the internet as their main source of world news. Those in Italy (40%) and Japan (39%) were also most likely to see the internet as their main source of national news. For local news, internet users in Italy (33%) were the most likely to see the internet as their main source of news, followed by Japan (29) and Spain (29%).

In Germany, there was a significant increase (four percentage points) in the number of respondents who regarded the internet as their main source of local news, from 17% in 2014 to 21% in 2015.

Further information relating to the consumption of news can be found in the Section 1.7 of this report.

Figure 6.37 The internet as a primary source of news



Source: Ofcom consumer research September - October 2015

Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004

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

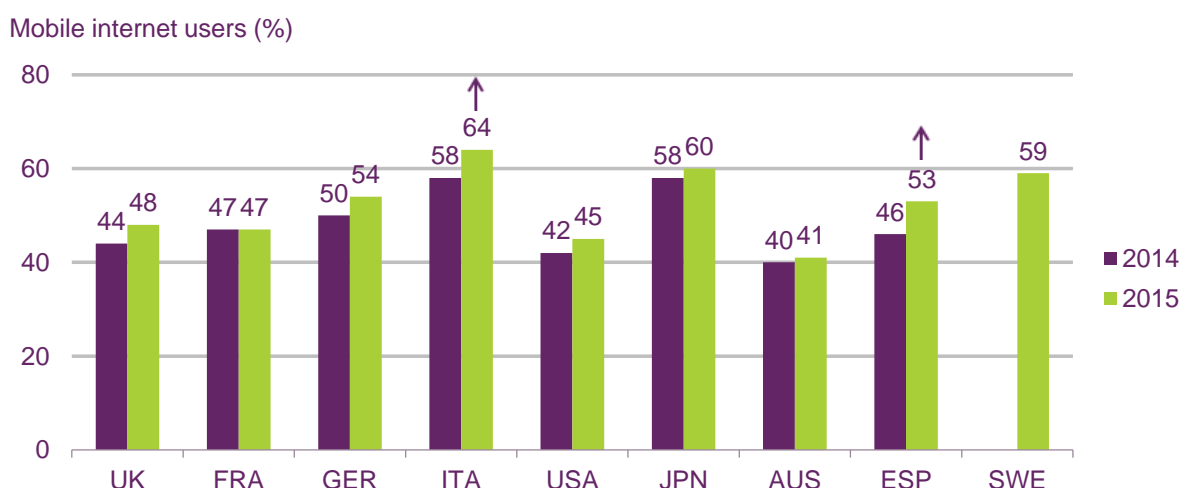
Note: Direction of arrow indicates a statistically significant difference compared to last year.

Reading the news online using a smartphone/ mobile phone is most popular in Italy

Italy has the largest proportion of mobile/ smartphone users who read the news online using their handset, at 64%. The proportion of mobile/ smartphone owners who read the news online in the UK is lower, at 48%.

Mobile online news consumption grew significantly year on year in Italy and Spain. Between 2014 and 2015, the proportion of respondents who read the news on a mobile/ smartphone grew by six percentage points in Italy and by seven percentage points in Spain.

Figure 6.38 Use of mobile phones/smartphones for reading the news online



Source: Ofcom consumer research October 2014 and September - October 2015

Base: All respondents who access internet with a mobile phone/ smartphone. 2015: UK=594, FRA=568, GER=623, ITA=779, USA=523, JPN=573, AUS=610, ESP=803, SWE=678; 2014: UK=540, FRA=469, GER=531, ITA=762, USA=443, JPN=566, AUS=579, ESP=742.

Q.9a Which, if any, of the following internet activities do you use each of your devices for?

Note: Direction of arrow indicates a statistically significant difference compared to last year.

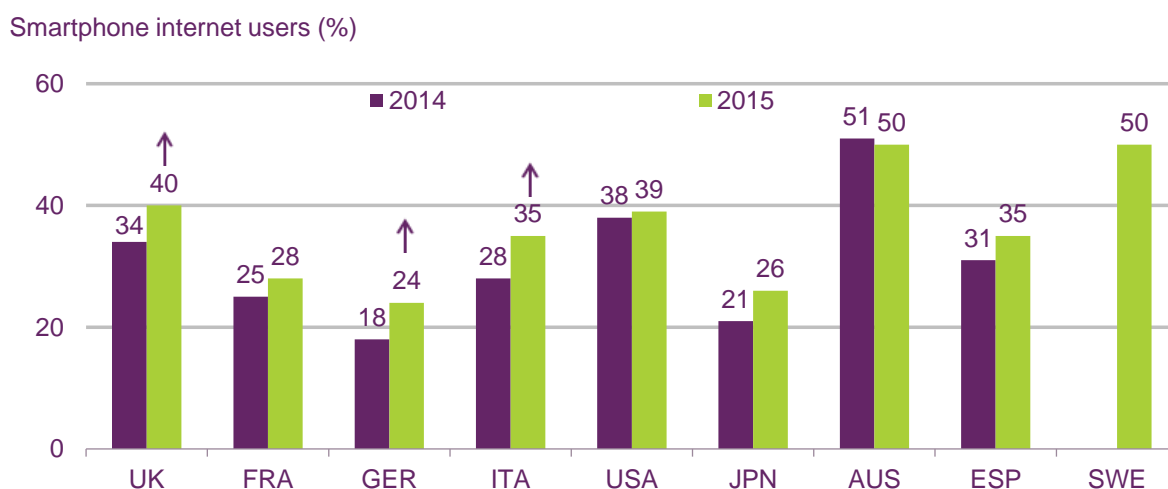
6.3.8 Online banking

Forty per cent of UK smartphone users bank online using their handset

The use of smartphones for online banking in the UK increased by six percentage points, from 34% to 40%, in the year to 2015. The UK was one of three comparator countries to experience significant growth in the use of smartphones for online banking, along with Italy and Germany. But the highest take-up of mobile online banking was in Sweden and Australia, where half (50%) claimed to do this.

The countries with the lowest proportion of respondents using their smartphone for online banking were Japan (26%), and Germany (24%).

Figure 6.39 Use of smartphone for online banking



Source: Ofcom consumer research September 2014 and September – October 2015
Base: All respondents who access internet using smartphone, UK=529/576, FRA=440/544, GER=513/605, ITA=724/753, USA=425/503, JPN=565/469, AUS=552/583, ESP=709/774, SWE=n/a/650. Q.9a Which, if any, of the following internet activities do you use each of your devices for?: Online banking

Note: Direction of arrow indicates a statistically significant difference compared to last year.

Mobile users in the US and Italy are most likely to make electronic payments and transfer money using their handsets

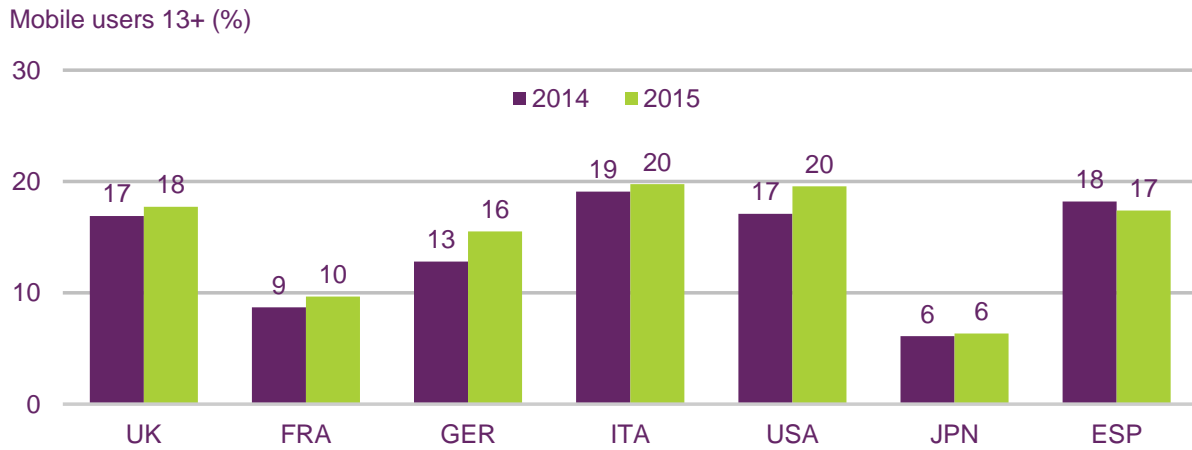
An electronic payment/ money transfer is an online method of transferring money from one account to another without the need for paper documents. Providers of such services include PayPal, Western Union, TransferWise and Azimo.com.

In the US and Italy, a fifth (20%) of mobile users made use of electronic payments or money transfer on their mobile phones. In the US, there was a year-on-year increase of three percentage points to August 2015 and in Italy, an increase of one percentage point. The relatively high level of online banking on smartphones in Italy might be attributable to a number of factors, but Poste Italiane has been at the forefront of innovation in this area, enabling mobile money transfer services in Italy in 2009¹³⁹.

In the UK, 18% of mobile users had made use of electronic payments or money transfers on their mobile phones, up by one percentage point since 2014.

¹³⁹ <http://ir.moneygram.com/releasedetail.cfm?releaseid=779330>

Figure 6.40 Monthly use of electronic payments or money transfer on mobile phones



Source: comScore MobiLens, August 2014 (three-month average), and August 2015 (three-month average), mobile users aged 13+

Note: *For August 2015 (three-month average) UK and USA results are from comScore MobiLens Plus