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The International Communications Market 2016

6 Internet and online content

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6.1 Internet and online content: overview and key market developments

6.1.1 Overview

Portable devices were more popular than desktops in all the comparator countries

In the UK, 78% of consumers have access to a laptop and 72% use a smartphone, but only 53% of consumers have desktop computers. Among our comparators, the UK stands relatively high on tablet take-up, at 60%, which is significantly higher than take-up in France, Germany, the US, Japan and Australia. However, the UK is comparatively low on smartphones; take-up is lower than in the majority of countries, with the exception of the US and Japan.

Smartphones stand out as being the device of choice for consumers to use to spend time online, across all the comparator countries. In the US, smartphone users spent 87 hours per month browsing on their smartphones, compared to 34 hours on their laptops or desktops. UK smartphone users spent the second-longest time browsing online, at 66 hours per month.

The UK reported the third highest use of smartphones for shopping online

The wide availability and use of smartphones demonstrates the increased connectivity across the UK and other comparator countries. Consumers in each of our comparator countries use their smartphones for a wide range of activities including banking, streaming, booking cabs and reserving tables at restaurants (Figure 1.1). The UK reported the third highest use of smartphones for browsing or shopping online, behind Italy and the US.

Online advertising spend grew for all our comparator countries

The popularity of smartphones is reflected in substantial year-on-year increases in mobile advertising spend per head, with the UK maintaining its position in second place (£39.63 in 2015) behind the US (£42.02). In 2015, China had the greatest share of all advertising expenditure on the internet; 53% of all its advertising spend was online, overtaking the UK (48%) and Sweden (48%).

Google and Facebook were among the most-visited online entities among the majority of comparator countries

Turning to the most frequently accessed online content, Google sites are the most-visited online entity, among the majority of comparator countries, on laptops and desktops, with the exception of Japan, where Yahoo is the top online entity. Social networking continues to be popular among consumers; in the UK, 73% use social networking sites at least once a week. In Italy and Spain, more than eight in ten consumers access social networks every week. In the UK, the US, Italy and Spain, Facebook is the second most visited online entity accessed on a smartphone or tablet.

Figure 6.1 Key metrics: 2015 and 2016

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
¹ Online Universe (MM) (2016)	41	38	52	25	205	59	16	21	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
² Desktop take-up (%)	53	58	63	63	61	51	61	69	n/a	56	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
² Laptop take-up (%)	78	79	75	74	69	61	76	70	n/a	70	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
² Tablet take-up (%)	60	50	49	63	49	34	56	64	n/a	57	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
² Smartphone take-up (%)	72	77	78	89	68	72	78	87	n/a	81	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
³ Internet share of total Advertising spend (%)	48	33	29	28	35	23	40	24	42	48	30	18	29	22	31	11	53	n/a
⁴ Fixed internet advertising expenditure (£bn)	5.7	3.1	4.2	1.2	25.4	4.4	2.2	0.8	1.1	0.9	0.4	0.2	2.5	0.8	1.0	0.3	13.7	0.02
⁴ Fixed internet advertising expenditure per capita (£)	88	48	51	20	79	35	92	17	65	88	12	31	50	4	7	13	10	0.1
⁴ Mobile internet advertising expenditure (£m)	2564	433	275	168	13528	938	766	89	10	166	3	23	673	129	130	9	1525	10
⁴ Mobile internet advertising expenditure per capita (£)	40	7	3	3	42	7	32	1.93	1	17	0.1	4	13	1	1	0.4	1.1	0.1
⁵ B2C e-commerce turnover per capita (£)	1760	730	536	201	1207	590	227	285	688	717	143	n/a	841	n/a	104	n/a	364	n/a
⁶ Use mobile phone to browse shopping websites and apps (%)	54	45	28	56	58	45	52	n/a	n/a	47	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
⁶ Use mobile phone to check bank balance (%)	37	34	25	30	43	16	48	n/a	n/a	58	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
² Weekly or greater access to social networking (%)	73	70	64	82	76	53	74	85	n/a	74	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

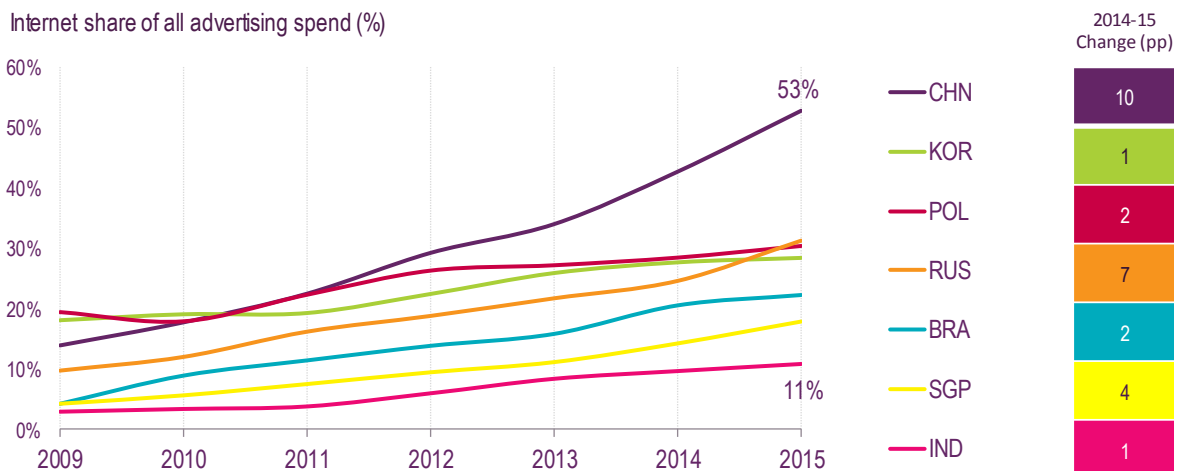
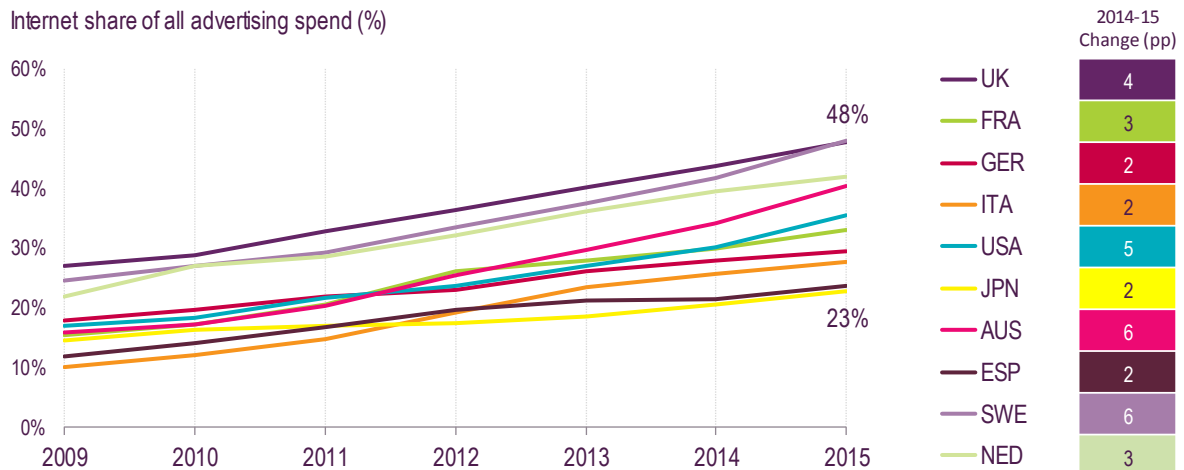
Source: ¹comScore MMX, August 2016, home and work panel, persons 15+; ²Ofcom consumer research October 2016; ³2015 Data. Warc data (www.warc.com) Please refer to notes on adspend data for further detail and source information. <http://www.warc.com/NotesOnAdspendData> *UK excludes certain types of adspend which is not monitored in other markets, enabling a like-for-like comparison ⁴2015 data. Ofcom analysis based on data from PwC Global entertainment and media outlook 2016-2020 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS. Ofcom have used an exchange rate of \$1.529 to the GBP, representing the IMF average for 2015. ⁵2015 data. European B2C e-commerce report 2016, Ecommerce Foundation & Ecommerce Europe. Values converted from Euros to British Sterling (£1=€1.38). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS ⁶Deloitte Global Mobile Consumer Survey 2016. Some figures in table have been rounded. MM = millions

6.1.2 Internet advertising

The UK continues to have the highest internet share of advertising, at 48%

The UK was on a par with Sweden; only China, at 53%, was higher among our comparator countries, overtaking the UK for the first time.

Figure 6.2 Internet share of total advertising spend: 2009 - 2015



Source: Warc data (www.warc.com)

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

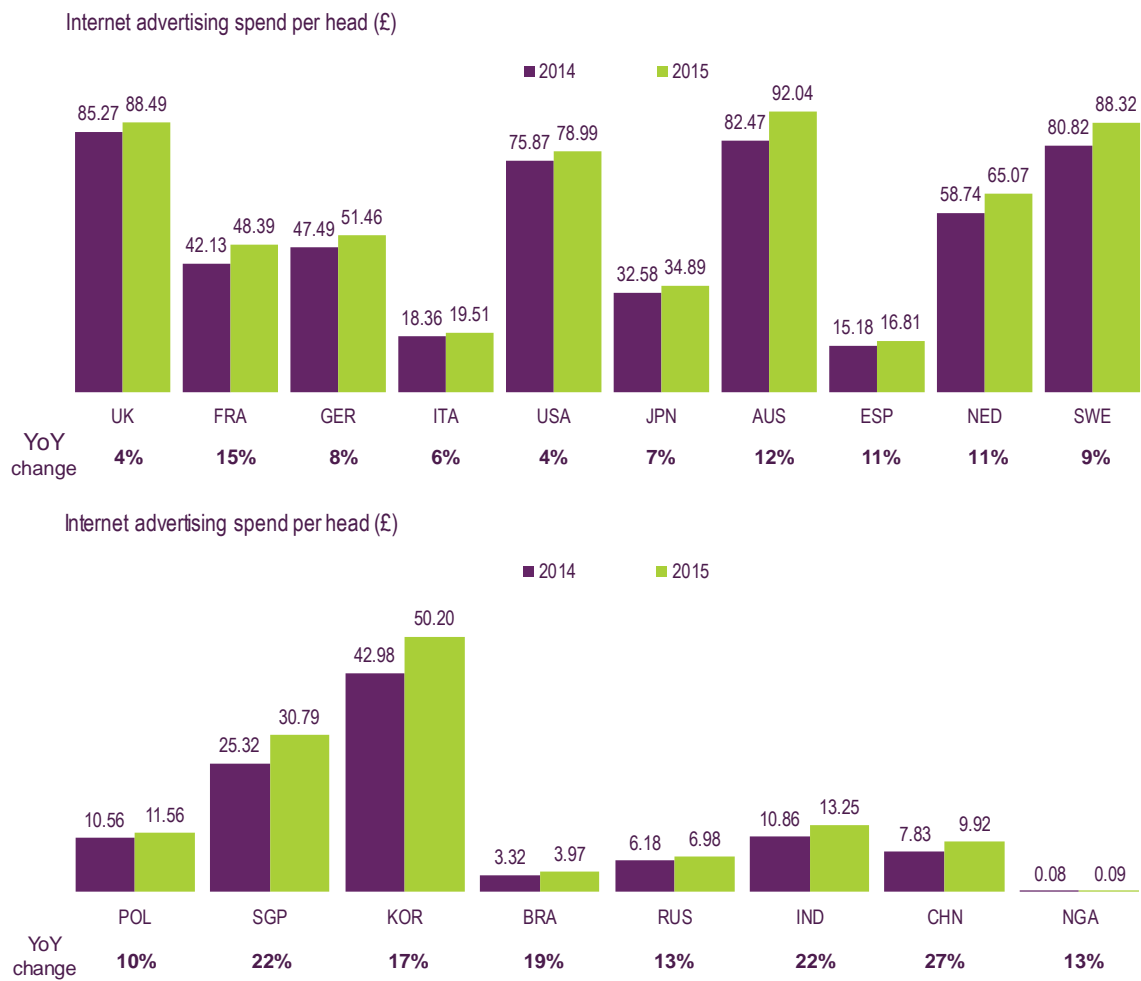
<http://www.warc.com/NotesOnAdspendData> *UK excludes certain types of adspend which is not monitored in other markets, thus enabling a like-for-like comparison

The UK had the second highest fixed internet advertising expenditure per head in 2015

The UK's spend per head on fixed internet advertising¹⁴⁰ in 2015 was £88.49. Per-capita spend was highest in Australia, at £92.04, overtaking the UK.

¹⁴⁰ Fixed internet advertising refers to adverts viewed on fixed or 'wired' devices, predominantly through web browsers on laptop and desktop computers.

Figure 6.3 Fixed internet advertising expenditure per head: 2014 - 2015



Source: Ofcom analysis based on data from PwC Global entertainment and media outlook 2016-2020 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.529 to the GBP, representing the IMF average for 2015. Population figures from Ofcom/IHS.

Search advertising accounted for more than half of total fixed internet advertising spend in the UK in 2015

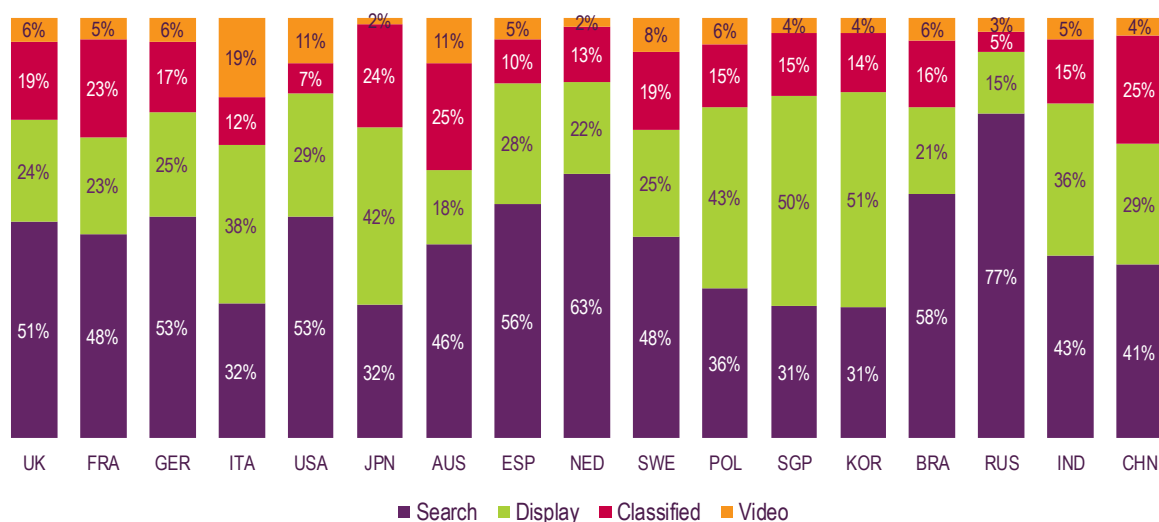
The respective strengths of internet, classified,¹⁴¹ display, search and video advertising¹⁴² are likely to be the result of a number of country-specific factors including broadband penetration, broadband speeds, and the strength of other media competing for advertising spend.

Over half of our comparator countries spend more on search advertising than any other type. Search accounted for just over half of internet advertising revenue in the UK (51%). Of all the comparator countries, search's share of total fixed internet advertising expenditure was highest in Russia (77%).

Video advertising continued to account for a generally small share of fixed internet advertising expenditure. It had the smallest share in all but two countries: Italy (19%) and the US (11%). Video advertising made up 6% of expenditure in the UK.

Figure 6.4 Fixed internet advertising expenditure, by category: 2015

Proportion of internet advertising revenue (%)



Source: Ofcom analysis based on data from PwC Global entertainment and media outlook 2016-2020 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.529 to the GBP, representing the IMF average for 2015.

¹⁴¹ Online classified advertising is a brief advert, usually in small print, in an online newspaper, magazine or similar publication.

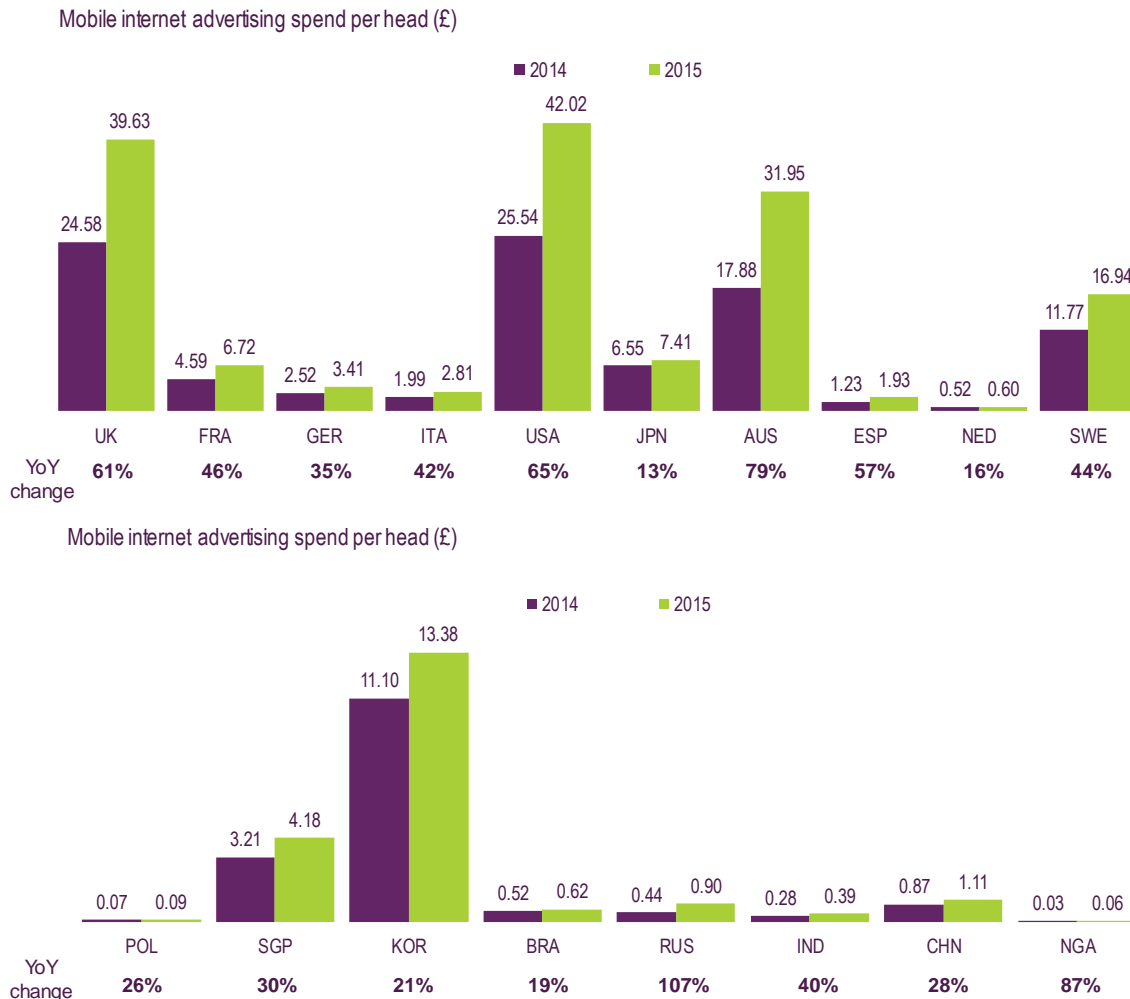
¹⁴² Online video display advertising can take one of two forms. The first is similar to display advertising on websites, but in the form of an audio-visual advert rather than a static image or series of animated images, and like banner advertising, can sit in the page alongside other content. The second is similar to traditional spot television advertising, where adverts are shown either before, after, or midway through an online video, and the advert is embedded within the video player.

6.1.3 Mobile internet advertising

The UK had the second highest spend per head on mobile internet advertising

Of all our comparator countries, the US had the highest mobile advertising¹⁴³ expenditure per head in 2015, at £42.02, followed by the UK at £39.63.

Figure 6.5 Mobile internet advertising expenditure, per head: 2014 - 2015



Source: Ofcom analysis based on data from PwC Global entertainment and media outlook 2016-2020 @ pwc.com/outlook. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.529 to the GBP, representing the IMF average for 2015. Population figures from Ofcom/IHS.

6.1.4 E-commerce

The UK continued to have the highest per-capita turnover for e-commerce in 2015

The business-to-consumer (B2C) e-commerce market is supported by consumers who increasingly expect to do their shopping online and at any time, via their connected device.

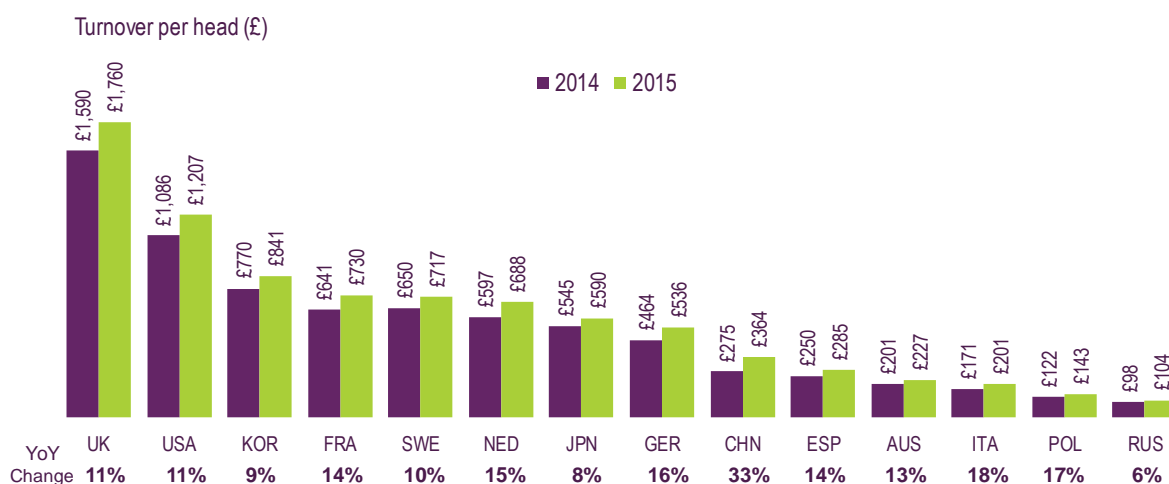
¹⁴³ Mobile advertising includes all advertising delivered directly to a mobile device, and includes search and display advertising as well as SMS/MMS advertising formats. Mobile display advertising can also be delivered to the device's browser or to a mobile app.

As in 2014, among our comparator countries, B2C e-commerce turnover, on a per-capita basis, was highest in the UK, at £1760 per person. This is much larger than the next highest markets: the US (£1207 per head), and South Korea (£841 per head).

This high UK figure may be due to a combination of factors, including a traditionally strong history of catalogue shopping, overall satisfaction with postal services and the high availability of debit and credit cards.

E-commerce turnover per head was relatively low in Italy (£201), despite the high proportion of those with a smartphone who claimed to shop online regularly (Figure 6.7).

Figure 6.6 B2C e-commerce turnover, per head: 2014 - 2015

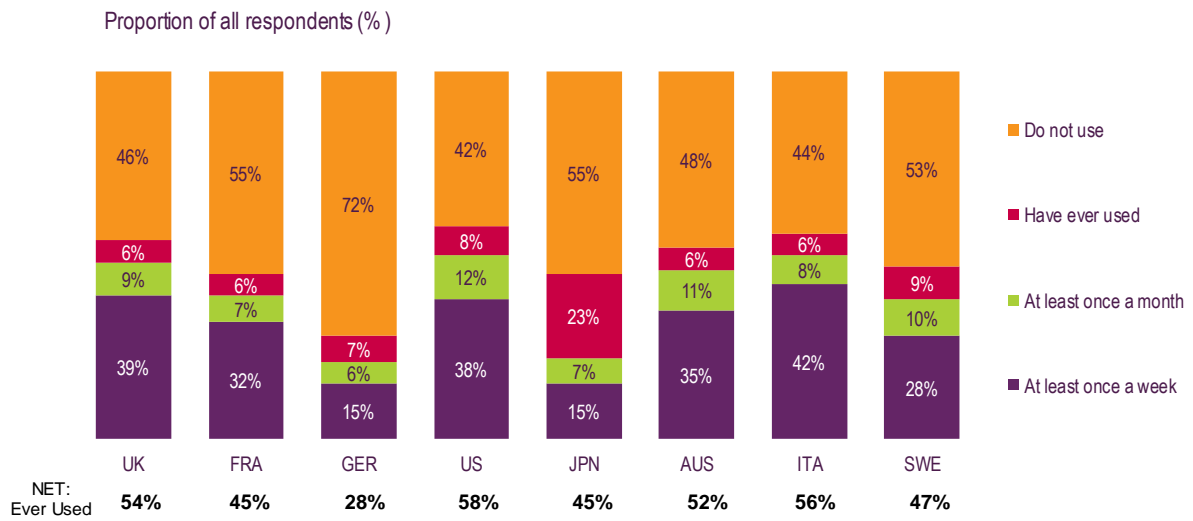


Source: European B2C e-commerce report 2016, Ecommerce Foundation & Ecommerce Europe
 Notes: Values converted from Euros to British Sterling (£1 = €1.38). Interpretation and manipulation of data are solely Ofcom's responsibility. Population figures from Ofcom/IHS.

Four in ten mobile phone users in the UK browse shopping websites and apps every week

At 42%, Italy had the highest proportion of mobile phone users who claimed to use their devices to browse shopping websites or apps at least once a week. The UK reported the second highest use, of our comparator countries (39%), in line with the US. In contrast, both Germany and Japan had the lowest proportion of respondents who said they did this at least once a week. The UK was one of four comparator countries where less than half of mobile phone users said that they did not use their device for browsing shopping websites and apps.

Figure 6.7 Use of mobile phone to browse shopping websites and apps: 2016



Source: Deloitte Global Mobile Consumer Survey 2016

Base: All adults 18-75 who have a mobile phone, UK=3712, FRA=1847, GER=1838, ITA=1862, USA=1776, JPN=1431, AUS=1864, SWE=1893

Q50NEW_2 - Activities use mobile phone for - Browse shopping websites/apps.

Note: Figures have been rounded

6.2 Internet and devices

6.2.1 Device take-up

The UK has comparatively high take-up of tablets and laptops

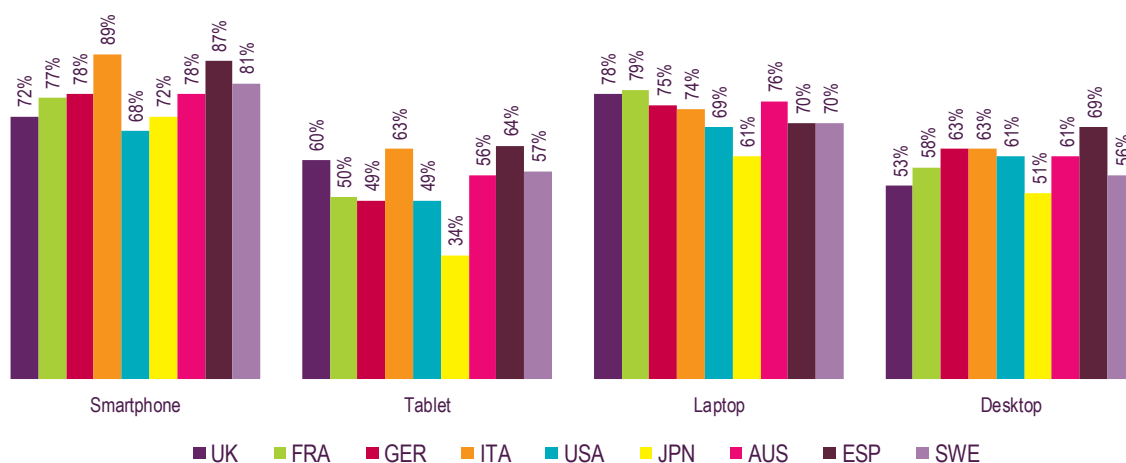
Tablet ownership in the UK was among the highest across our comparator countries, with 60% of respondents saying they had one in their household - higher than all countries apart from Italy, Spain and Sweden.

Laptop ownership for UK consumers was also higher than most comparator countries, at 78%, in line with France (79%) and higher than in the US, Japan, Spain and Sweden. In contrast, desktop take-up in the UK, at 53%, was lower than in six of our other comparator countries.

Although the UK was the second lowest among our comparator countries, nearly three-quarters (72%) of respondents here claim to have a smartphone.

Figure 6.8 Availability and personal use of devices: 2016

Proportion (%) of all respondents



Source: Ofcom consumer research, October 2016

Base: All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000

Q.3a Which of the following devices do you have in your home? (tablet, laptop, desktop)

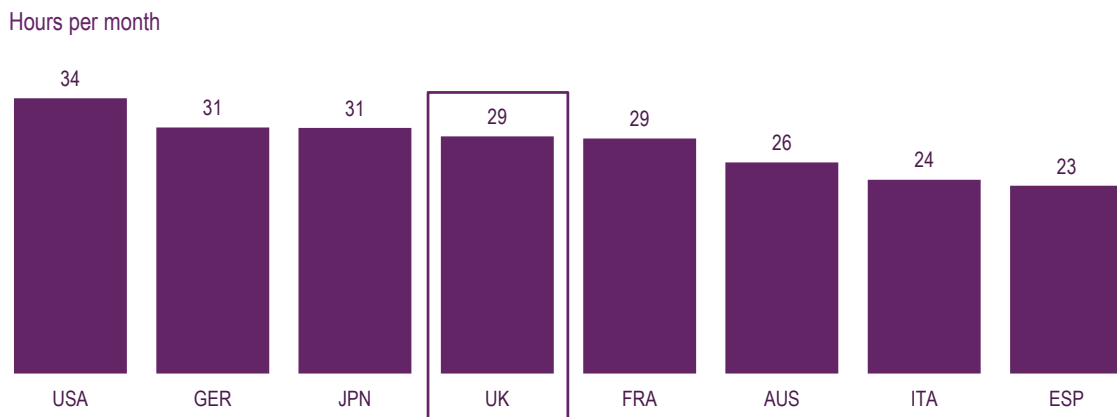
Q.4a Which of the following devices do you personally use either at home or elsewhere? (smartphone)

6.2.2 Time spent online

UK users spend 29 hours per month browsing on their laptops or desktop computers

Internet users in the US spent 34 hours online on a laptop or desktop computer in August 2016. This was the highest among our comparator countries, followed by Germany and Japan (both 31 hours), and the UK and France (both 29 hours).

Figure 6.9 Average time spent browsing on a laptop or desktop computer: August 2016



Source: comScore MMX, work and home panel, August 2016, persons 15+

UK smartphone users spend 66 hours per month browsing online

In the UK, smartphone owners spent, on average, 66 hours online on their smartphones in August 2016. Smartphone users in the US spent more time online, at 87 hours. UK users spent more than twice as much time browsing on a smartphone than on their laptop or desktop; this was also the case in the US, Spain and Italy.

Figure 6.10 Average time spent browsing on a smartphone: August 2016



Source: comScore Mobile Metrix, August 2016, adults 18+, all smartphones, browsing and application combined.

Note: *Mobile Metrix in the UK, US, Italy and Spain is supplemented by panel data and has not been directly compared with the remaining comparator countries.

6.3 Online content

6.3.1 Websites and apps

Google-owned sites had the highest reach in all but one of our comparator countries in August 2016, on desktop and laptop computers

Google's properties¹⁴⁴ (which include services such as Gmail and YouTube, as well as Google search) had the highest reach in all of our comparator countries, with the exception of Japan. Microsoft sites¹⁴⁵ were among the top three in reach across all comparator countries. Amazon sites were among the top ten properties in all comparator countries, while eBay was in the top ten in five of the comparator countries.

As in previous years, domestic media and publishing services such as the BBC in the UK, Gruppo Editoriale Express (Italy) and Vocento (Spain) featured among the top ten properties in their home countries. The BBC is the only public broadcaster to feature in the top ten, although other properties that relate to companies with broadcast TV divisions, such as CBS Interactive and Comcast NBC Universal (both US) also appear.

Only in the UK and Australia did a government property feature within the top ten highest-ranked web properties in August 2016 (WWW.GOV.UK¹⁴⁶ and ABS.GOV.AU¹⁴⁷ respectively).

¹⁴⁴ comScore 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.

¹⁴⁵ These sites include MSN (which is likely to be used as a default browser homepage by some users), Bing Search, and websites for Microsoft Office, Outlook and Windows.

¹⁴⁶ Its feature in the top 10 reflects its role as a single point of contact for citizens to access central government services online in the UK.

¹⁴⁷ In August 2016, the Australian Bureau of Statistics held Australia's census. People were able to complete this online, accounting for the reach of the Bureau's website (ABS.GOV.AU).

Figure 6.11 Top ten properties accessed on a laptop or desktop computer, by country: 2016

	UK	FRA	GER	ITA	US	JPN	AUS	ESP
1	Google Sites	Google Sites	Google Sites	Google Sites	Google Sites	Yahoo Sites	Google Sites	Google Sites
2	Microsoft Sites	Facebook	Facebook	Facebook	Yahoo Sites	Google Sites	Microsoft Sites	Microsoft Sites
3	Facebook	Microsoft Sites	Microsoft Sites	Microsoft Sites	Microsoft Sites	Microsoft Sites	Facebook	Facebook
4	Amazon Sites	Yahoo Sites	eBay	ItaliaOnline	Facebook	LINE Corporation	Yahoo Sites	Yahoo Sites
5	Yahoo Sites	Webedia Sites	Amazon Sites	Yahoo Sites	Amazon Sites	FC2 inc.	News Corp Australia	Unidad Medios Digitales
6	eBay	Schibsted Media Group	Axel Springer SE	Amazon Sites	AOL, Inc.	Amazon Sites	eBay	Amazon Sites
7	BBC Sites	Solocal Group	Deutsche Telekom	Banzai	Apple Inc.	Rakuten Inc.	Amazon Sites	Prisa
8	WWW.GOV.UK	CCM Benchmark	Hubert Burda Media	eBay	eBay	NTT Group	Telestra Corporation Limited	Vocento
9	Apple Inc.	Amazon Sites	Yahoo Sites	Wikimedia Foundation Sites	CBS Interactive	Facebook	ABS.GOV.AU	Wikimedia Foundation Sites
10	Wikimedia Foundation Sites	Orange Sites	United-Internet Sites	Gruppo Editoriale Espresso	Comcast NBC Universal	CyberAgent	Wikimedia Foundation Sites	Schibsted Media Group

Source: comScore MMX, home and work panel, August 2016 persons 15+

Google sites and domestic media companies were among the most popular properties on smartphones and tablets in August 2016

There are some differences between online content consumption on laptop and desktop computers, and mobile devices (smartphones and tablets). Media groups and multimedia publishing groups were notably popular on mobile devices. RCS MediaGroup was in the top ten properties in Italy and Spain, while Trinity Mirror Group (UK) and Prisa (Spain) featured among the top ten properties in the markets in which they operate.

On smartphones and tablets, Yahoo and Google sites featured in the top ten properties in all of the comparator countries.

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

Figure 6.12 Top ten properties accessed on smartphones and tablets, by country: 2016

	UK	ITA	US	ESP
1	Google Sites	Google Sites	Google Sites	Google Sites
2	Facebook	Facebook	Facebook	Facebook
3	BBC Sites	Banzai	Yahoo Sites	RCS MediaGroup
4	Amazon Sites	Gruppo Editoriale Espresso	Amazon Sites	Vocento
5	Trinity Mirror Group	RCS MediaGroup	Comcast NBCUniversal	Prisa
6	Trip Advisor Inc.	Leonardo ADV	CBS Interactive	Grupo Godo
7	Sky Sites	Yahoo Sites	AOL, Inc.	Schibsted Media Group
8	Yahoo Sites	Gruppo Mediaset	Apple Inc.	Grupo Herald
9	Mail Online / Daily Mail	Tripadvisor Inc.	LinkedIn	Yahoo Sites
10	eBay	Italia Online	Weather Company, The	Atresmedia

Source: comScore MoMX, Total mobile, browser and applications, August 2016.

Note: *Mobile Metrix in the UK, US, Italy and Spain is supplemented by panel data and has not been directly compared with the remaining comparator countries which have a related but different methodology.

In August 2016, Pokémon Go was the most downloaded iOS app in the UK

According to App Annie's data on downloads from the App Store, Niantic's Pokémon GO was the most downloaded iOS app in the UK, as it was in France and Italy. The 2016 Olympic Games were held in August 2016, and in both France and Italy, the Olympic Games apps that were published by the national public service broadcasters (Télévisions Françaises and Rai respectively) were among the top ten iOS apps by downloads, coinciding with the Olympics taking place that same month.

Apple's iTunesU¹⁴⁸ educational app was in the top ten in all of the countries. In several of the comparator countries, August-September marks the end of the summer holiday and the start of a new school or university year.

¹⁴⁸ iTunesU allows tutors and students to access educational resources, and manage and submit lessons and assignments on mobile devices such as tablets.

Figure 6.13 Top ten iOS apps, by downloads: August 2016

	UK	FRA	GER	ITA	US	JPN	ESP
1	Pokémon GO [Niantic]	Pokémon GO [Niantic]	iTunesU [Apple]	Pokémon GO [Niantic]	iTunesU [Apple]	White Cat Tennis (白猫テニス) [COLOPL (コロブラ)]	Rio 2016 Olympics (Juegos Olímpicos Río 2016) [RTVE]
2	WhatsApp Messenger [Facebook]	Bitmoji [Snapchat]	Apple iMovie [Apple]	Rai Rio2016 [Rai Net]	Pokémon GO [Niantic]	iTunesU [Apple]	Pokémon GO [Niantic]
3	Flip Diving [Miniclip]	francetv JO – Rio 2016 [France Télévisions]	Pokémon GO [Niantic]	WhatsApp Messenger [Facebook]	Apple iMovie [Apple]	Apple iMovie [Apple]	Apple iMovie [Apple]
4	Snapchat [Snapchat]	Snapchat [Snapchat]	Pages [Apple]	Rio 2016 Olympic Games [Neowiz]	Bitmoji [Snapchat]	Pages [Apple]	iTunesU [Apple]
5	Facebook Messenger [Facebook]	WhatsApp Messenger [Facebook]	Apple Numbers [Apple]	Facebook Messenger [Facebook]	Pages [Apple]	Apple Numbers [Apple]	Prisma [Prisma labs]
6	Facebook [Facebook]	Facebook Messenger [Facebook]	Apple Keynote [Apple]	Prisma [Prisma labs]	Apple Numbers [Apple]	Pokémon GO [Niantic]	Google Maps [Google]
7	Premier League [Premier League]	Facebook [Facebook]	GarageBand [Apple]	Instagram [Facebook]	Apple Keynote [Apple]	SNOW [NAVER]	Apple Numbers [Apple]
8	iTunesU [Apple]	Flip Diving [Miniclip]	WhatsApp Messenger [Facebook]	Flip Diving [Miniclip]	GarageBand [Apple]	Apple Keynote [Apple]	Apple Keynote [Apple]
9	Apple iMovie [Apple]	iTunesU [Apple]	Flip Diving [Miniclip]	Facebook [Facebook]	Snapchat [Snapchat]	GarageBand [Apple]	Pages [Apple]
10	Bitmoji [Snapchat]	Apple iMovie [Apple]	Bitmoji [Snapchat]	iTunesU [Apple]	Facebook Messenger [Facebook]	Yahoo! Japan Weather (Yahoo 天気) [Yahoo Japan]	WhatsApp Messenger [Facebook]

Source: App Annie Intelligence. Note: app publishes are shown in parentheses

In August 2016, the most downloaded app from Google Play was either PokémonGO or WhatsApp Messenger, in all but one of the reported countries

Messaging apps¹⁴⁹ such as Facebook Messenger, Snapchat and WhatsApp Messenger accounted for at least at least two of the top three downloads in August 2016 from Google Play in four comparator countries, including the UK. Messaging services among the top ten downloads in Japan (but not in the other countries) included Line and SNOW.¹⁵⁰

The BBC Media Player (allowing the playback of BBC video and audio content on Android devices)¹⁵¹ was the seventh most popular Google Play app downloaded in the UK in August 2016. Italy was the only other country in which an app published by a public service broadcaster was among the top ten downloads (Rai's Rio 2016 app).

¹⁴⁹ 'Over the top' (OTT) messaging apps use a data connection to allow users to send messages, (text/photos/voice/video) between each other over the internet, rather than the voice call / video call, SMS/MMS services provided by the user's mobile operator.

¹⁵⁰ LINE is a multimedia OTT messaging application published by South Korean online content and portal company Naver Corporation. SNOW, also published by Naver, is a video and picture messaging app which allows users to apply filters and effects to their pictures and videos.

¹⁵¹ The app provides support for, and management of, playback of content on a range of BBC services including the mobile website, BBC apps, and services such as iPlayer on Android devices.

Figure 6.14 Top Google Play apps, by downloads: August 2016

	UK	FRA	GER	ITA	US	JPN	ESP
1	Pokémon GO [Niantic]	Pokémon GO [Niantic]	WhatsApp Messenger [Facebook]	WhatsApp Messenger [Facebook]	Facebook Messenger [Facebook]	Pokémon GO [Niantic]	WhatsApp Messenger [Facebook]
2	Facebook Messenger [Facebook]	Facebook Messenger [Facebook]	Pokémon GO [Niantic]	Facebook Messenger [Facebook]	Pokémon GO [Niantic]	White Cat Tennis (白猫テニス) [COLOPL (コロブラ)]	Pokémon GO [Niantic]
3	WhatsApp Messenger [Facebook]	Snapchat [Snapchat]	Facebook Messenger [Facebook]	Facebook [Facebook]	Facebook [Facebook]	SNOW [NAVER]	Facebook [Facebook]
4	Facebook [Facebook]	Facebook [Facebook]	Facebook [Facebook]	Pokémon GO [Niantic]	YouTube Music [Google]	LINE (ライン) [LINE (ライン)]	Facebook Messenger [Facebook]
5	Snapchat [Snapchat]	WhatsApp Messenger [Facebook]	Snapchat [Snapchat]	Instagram [Facebook]	Snapchat [Snapchat]	GO Security [Sungy Mobile (广州久邦数码)]	Instagram [Facebook]
6	Instagram [Facebook]	Bitmoji [Snapchat]	Instagram [Facebook]	Rio 2016 Olympic Games [Neowiz]	Instagram [Facebook]	Yahoo! Japan Weather (Yahoo 天気) [Yahoo Japan]	Clean Master (猎豹清理大师) [Cheetah Mobile (猎豹移动)]
7	BBC Media Player [BBC]	Instagram [Facebook]	360 Battery Plus [Qihoo 360 (奇虎360)]	Prisma [Prisma labs]	Rolling Sky [Cheetah Mobile (猎豹移动)]	AbemaTV [CyberAgent (株式会社サイバーエージェント)]	Prisma [Prisma labs]
8	Z Camera: Filter Photo Editor [Sungy Mobile (广州久邦数码)]	Waze [Google]	Farm Heroes Super Saga [Activision Blizzard]	Snapchat [Snapchat]	Pandora Radio [Pandora]	SmartNews [SmartNews]	Rio 2016 Olympic Games [Neowiz]
9	Spotify [Spotify]	Farm Heroes Super Saga [Activision Blizzard]	eBay Kleinanzeigen [eBay]	Slither.io [Lowtech Studios]	Bitmoji [Snapchat]	Instagram [Facebook]	Snapchat [Snapchat]
10	Slither.io [Lowtech Studios]	Skype [Microsoft]	Amazon [Amazon]	Rai Rio2016 [Rai Net]	WhatsApp Messenger [Facebook]	Yahoo! JAPAN [Yahoo Japan]	Wallipop [Wallipop]

Source: App Annie Intelligence. Note: app publishes are shown in parentheses

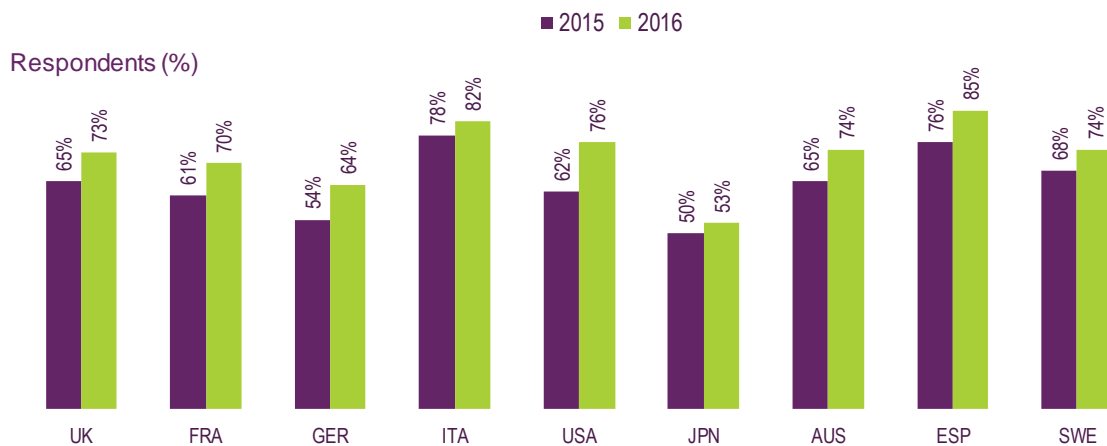
6.3.2 Social networking

Around three-quarters of UK internet users use social networks at least once a week

The majority of internet users in all of our eight comparator countries said they accessed social networks at least once a week in 2016. This was highest in Italy (82%) and Spain (85%), compared to 73% in the UK. Japan had the least active social networkers compared to the eight comparator countries, with just over half of respondents using social networks at least once a week.

In the majority of the comparator countries, the proportion of weekly social networkers increased between 2015 and 2016. The largest increase was in the US, from 62% to 76%.

Figure 6.15 Weekly access to social networks: 2015 - 2016



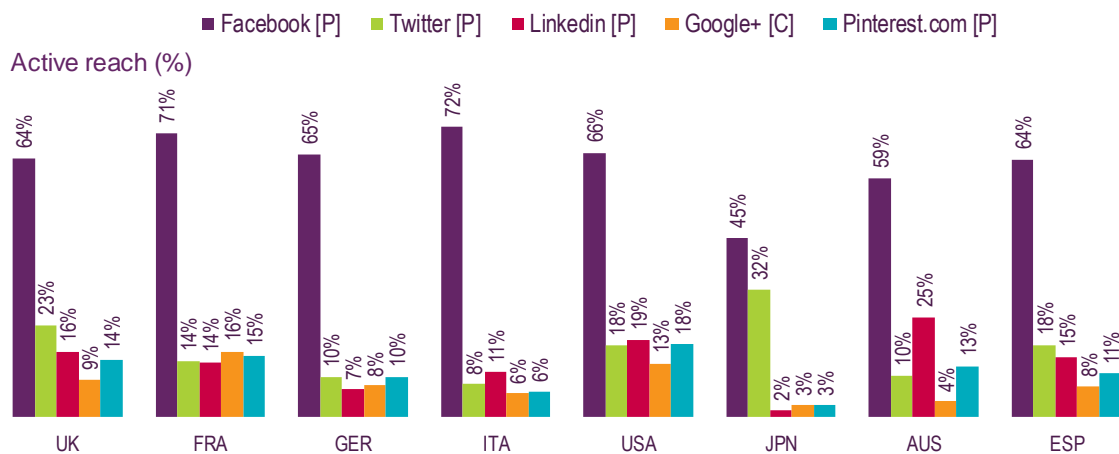
Source: Ofcom consumer research October 2015 and October 2016 Base (2016): All respondents, UK=1000, FRA=1008, GER=1010, ITA=1032, USA=1016, JPN=1011, AUS=1007, ESP=1016, SWE=1000 2015 Q.8 How often do you use an internet connection on any of your devices for each of the following activities? 5. Accessing social networking sites (e.g. Facebook, Twitter) <At least once a week> | 2016 Q.9 How often do you use the internet on any of your devices for each of the following activities? 2. Accessing social networking sites <At least once a week>

Facebook has the highest reach among social networks for all comparator countries

Among our comparator countries, Facebook’s reach on laptop or desktop computers was highest (in August 2016) in Italy (at 72%) compared to 64% in the UK.

LinkedIn had the second highest reach among the selected social networks in Italy, the US and Australia, while Twitter ranked second in the UK and Spain and Japan.

Figure 6.16 Active reach of selected social networks on laptop and desktop computers: 2016



Source: comScore MMX, home and work panel, August 2016, persons 15+

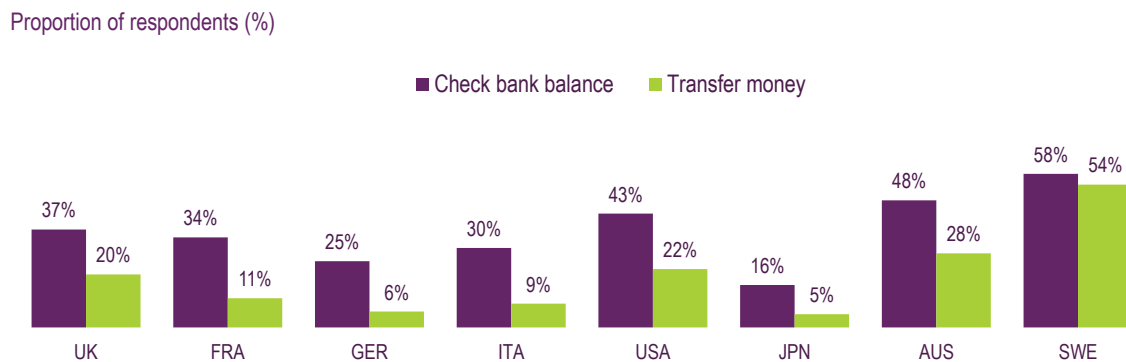
6.3.3 Mobile banking

More than a third of UK mobile phone users check their bank balance on their device

In the majority of comparator countries, more than a quarter of phone users claimed to check their bank balance using their device. In the UK the figure was 37%, ranking the UK fourth of the eight comparator countries.

An increasing number of apps offer the ability to send money to friends or businesses via a handset. These on-demand services can be delivered through integrated online platforms such as PayPal. In the UK, 20% of phone users transferred money with their device; the fourth highest among the comparator countries.

Figure 6.17 Use of mobile phone to check bank balance or transfer money: 2016



Source: Deloitte Global Mobile Consumer Survey 2016

Base: All adults 18-75 who have a phone or smartphone, UK=3712, FRA=1847, GER=1838, ITA=1862, USA=1776, JPN=1431, AUS=1864, SWE=1893

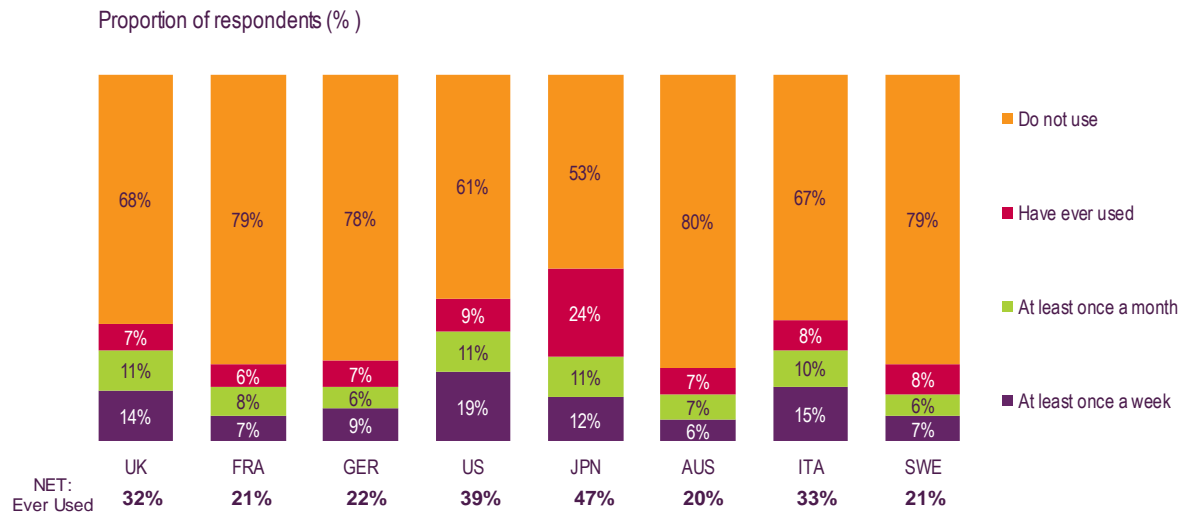
Q50BIS - In the last 3 months, have you used your phone to do any of the below?
Check bank balances / transfer money to another individual in the same country

6.3.4 Mobile payments

Three in ten mobile phone users in UK have ever used their mobile to pay for a product online

Across all of the comparator countries, a minority of mobile phone users had made an online payment on their mobile phone. In the UK, around a third (32%) of mobile phone owners claim to have used their device to purchase a product online, in line with Italy. This activity is most popular in Japan, where nearly half (47%) claim to have ever purchased a product online using their mobile device.

Figure 6.18 Use of mobile phone to pay for a product online: 2016



Source: Deloitte Global Mobile Consumer Survey 2016

Base: All adults 18-75 who have a phone or smartphone, UK=3712, FRA=1847, GER=1838, ITA=1862, USA=1776, JPN=1431, AUS=1864, SWE=1893

Q50NEW_3 - Activities use mobile phone for: Pay for a product

Note: Figures have been rounded