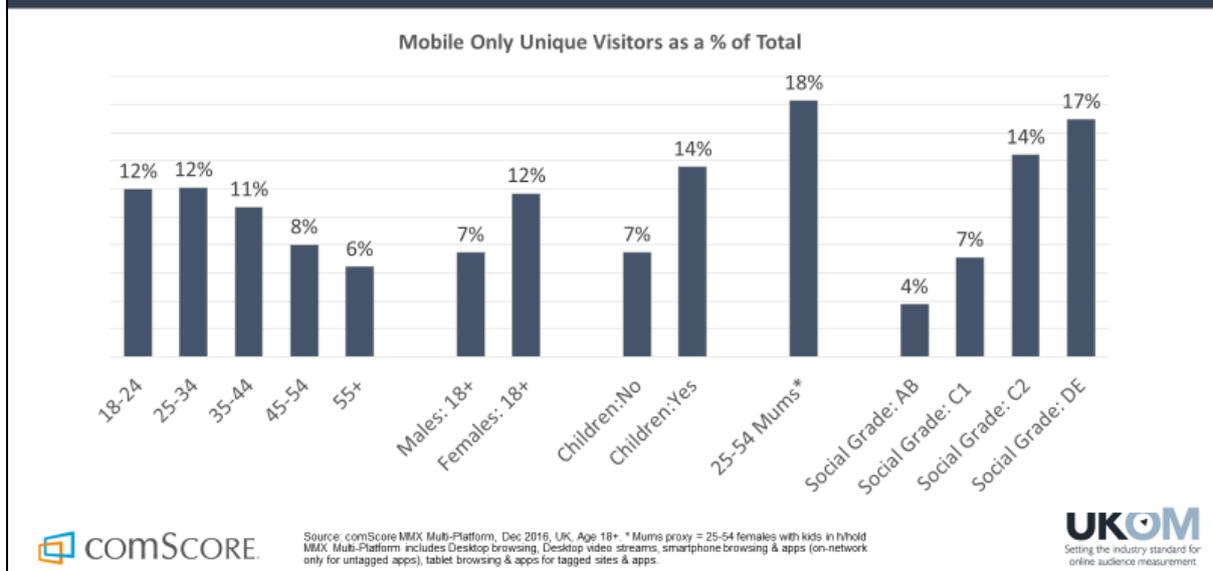


UKOM Insights

The 'Mobile Only' Audience

Latest UKOM approved comScore data shows that in December 2016, three quarters (74%) of online adults are now multi-platform – that is they use both a laptop or desktop AND a mobile device – either a smartphone or tablet – to access the internet. The remainder access via either desktop only (16%) or mobile only (10%). The theory that large swathes of Britons are deserting the desktop in favour of mobile devices does not seem to stack up. comScore data over the last 2 years shows that desktop audiences and time online is flat. However, although most of the UK adult online population is not in a rush to abandon the desktop, the 4 million who are currently 'mobile only' is not an insignificant number. This month UKOM asks – **Who is the 'mobile only' audience?**

Millennials, Females, Mums & DEs more likely to be mobile only



When looking at reach of mobile only audiences (defined as audiences who use only a tablet or smartphone) there seems to be a direct relationship with age. Younger audiences are more likely to be mobile only than older audiences. This finding is not exactly surprising - for many millennials, mobiles and the internet have formed part of their DNA. However, the fact that the number of mobile only 18-24s (732K) is almost identical to the number of mobile only 55+s (706k) suggests that the mobile only audience is NOT comprised solely of young people abandoning the desktop. Given the desktop audience is also flat, the likelihood is that mobile devices and particularly tablets for the 55+ age group, are boosting online reach, adding incremental audience.

Perhaps more surprising than age are the differences between gender, presence of children at home and social grade. Latest UKOM data shows that females are more likely to be mobile only than males (12% v 7%) and people in households with kids are more likely to be mobile only than those without (14% v 7%). Combining age, gender and presence of children the data suggests that **mums* are much more likely to be mobile only** with nearly 1 in 5 mums aged 25-54 only using a tablet or smartphone. Drilling down even further, mobile only reach goes up to 30% among females aged 25-34 with children at home.

Whilst UKOM cannot provide evidence of why mums are more likely to be mobile only, lack of time is likely to be a strong contributor. The type of content most likely to be consumed by mums only on a mobile device includes food, photos, entertainment news, family, health, beauty/fashion and real estate. Popular mobile only activities for mums include chatting on instant messenger, uploading photos, listening to the radio, reading newspapers and playing casual games. Mobile sessions are generally shorter than desktop sessions and smartphones and tablets are perhaps more convenient platforms for online snacking – particularly whilst multi-tasking.

Further analysis of the data suggests that social grade also has a role to play in solus platform usage. Higher social grades, perhaps more attractive to a lot of advertisers are less likely to be mobile only. Conversely those from social grade DE are more likely to go online only via a mobile device. This could be related to types of content they are more likely to view e.g. gaming, personals, classifieds and auctions or be down to another factor such as the cost of multiple devices. The type of role they do could also have an impact as they may be less likely to have an office based job.

In conclusion, although younger audiences lead the way in terms of not using the desktop, drilling down into the data shows that millennials are not the sole explanation for a mobile only audience and there are other factors at play. Tablets may be attracting a newer older 'mobile only' audience who never used a computer as they were too complicated/less accessible. Mobile devices may be more appealing to mums when their kids are young as they need to multi-task on the go and don't have time to fire up a laptop or PC. Mobiles may be a cheaper option for those of a lower social grade who may have less need for both a PC and a mobile device. Whilst these may all be hypotheses which would need further qualitative research to prove or disprove, what is clear is that understanding audience online behaviour and how this differs by age, life-stage, social grade and type of content and service consumed by platform is key to helping plan campaigns more effectively.

For more insights around these topics please visit our website at <http://www.ukom.uk.net/data-and-insights/latest-insights/>.

Notes on Data:

All data is based on UKOM industry standard and development level approved ComScore MMX Multi-Platform & comScore Mobile Metrix. Data is based on adults 18+ for December 2016. comScore MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps.

*For the purpose of this report Mums are defined as '25-54 females with children in the household'.