

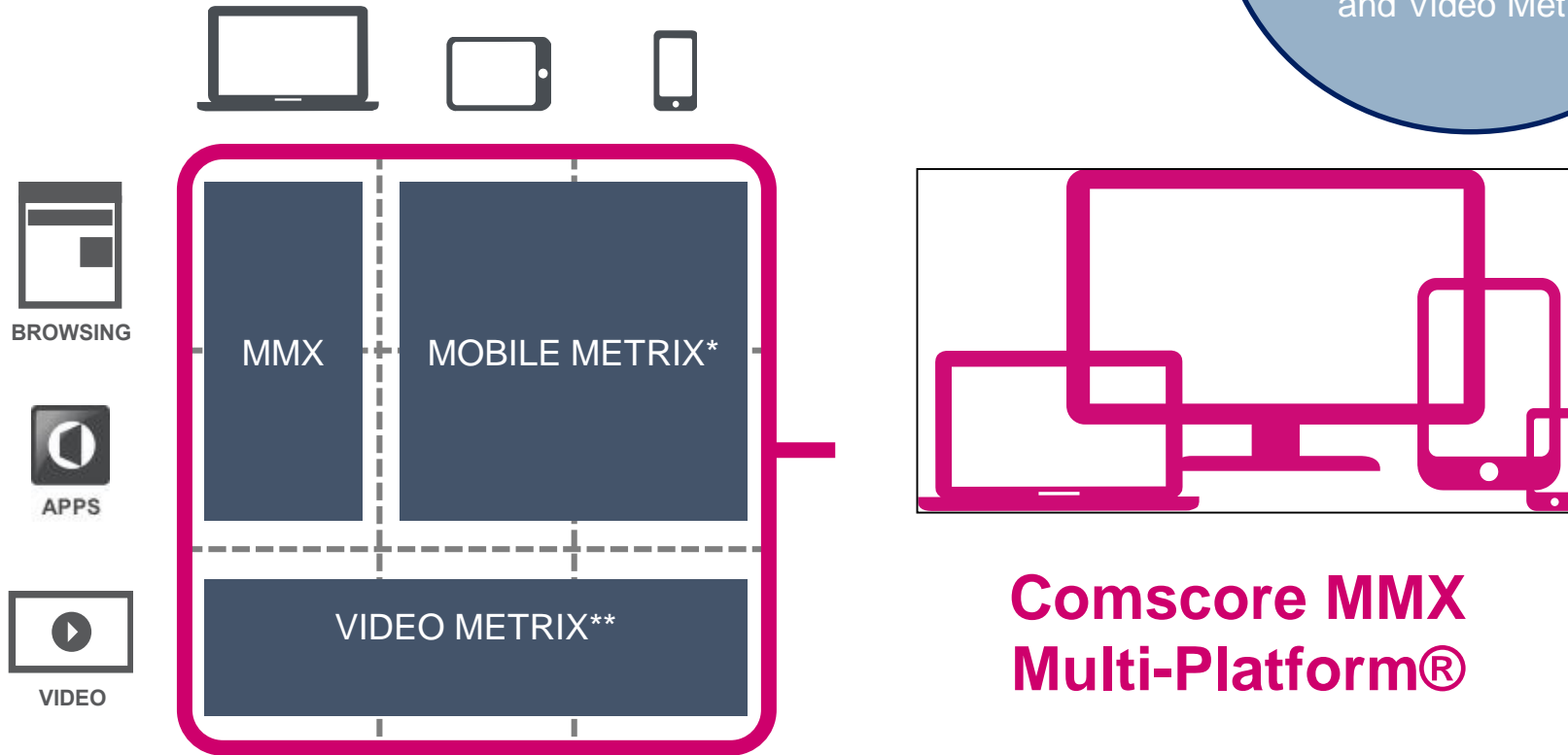
# UK Digital Market Overview – March 2019



If you have any questions, please  
contact: [insights@ukom.uk.net](mailto:insights@ukom.uk.net)

# A Guide to Data Sources

Total Digital Population = Unduplicated audience across MMX, Mobile Metrix and Video Metrix



**Comscore MMX  
Multi-Platform®**

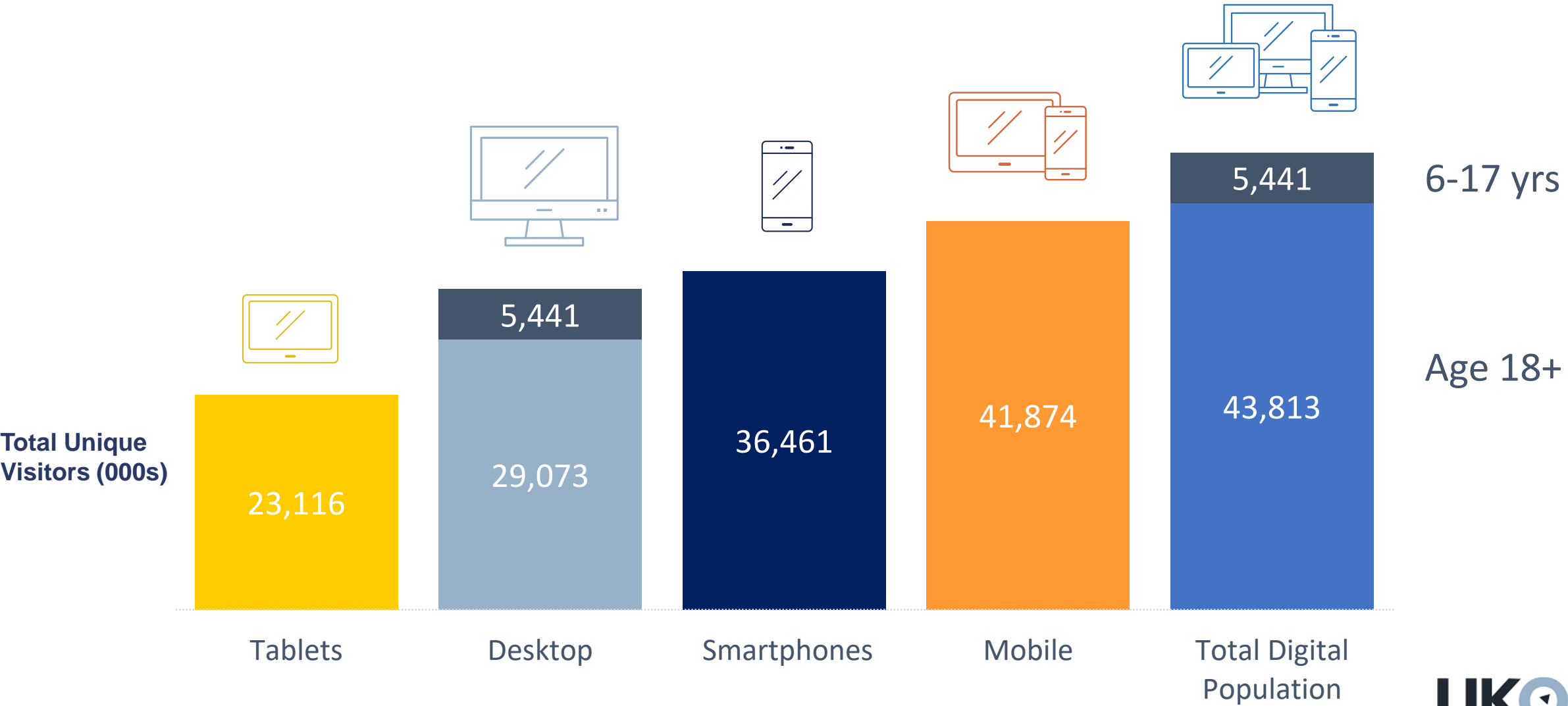
\*Please note that we use the term mobile to refer to smartphone and tablet usage combined

\*\*MMX Multi-Platform does not yet include mobile and tablet video. This is separately available in VMX-MP



# Usage by Platform

# Breakdown of Digital Unique Visitors by Platform

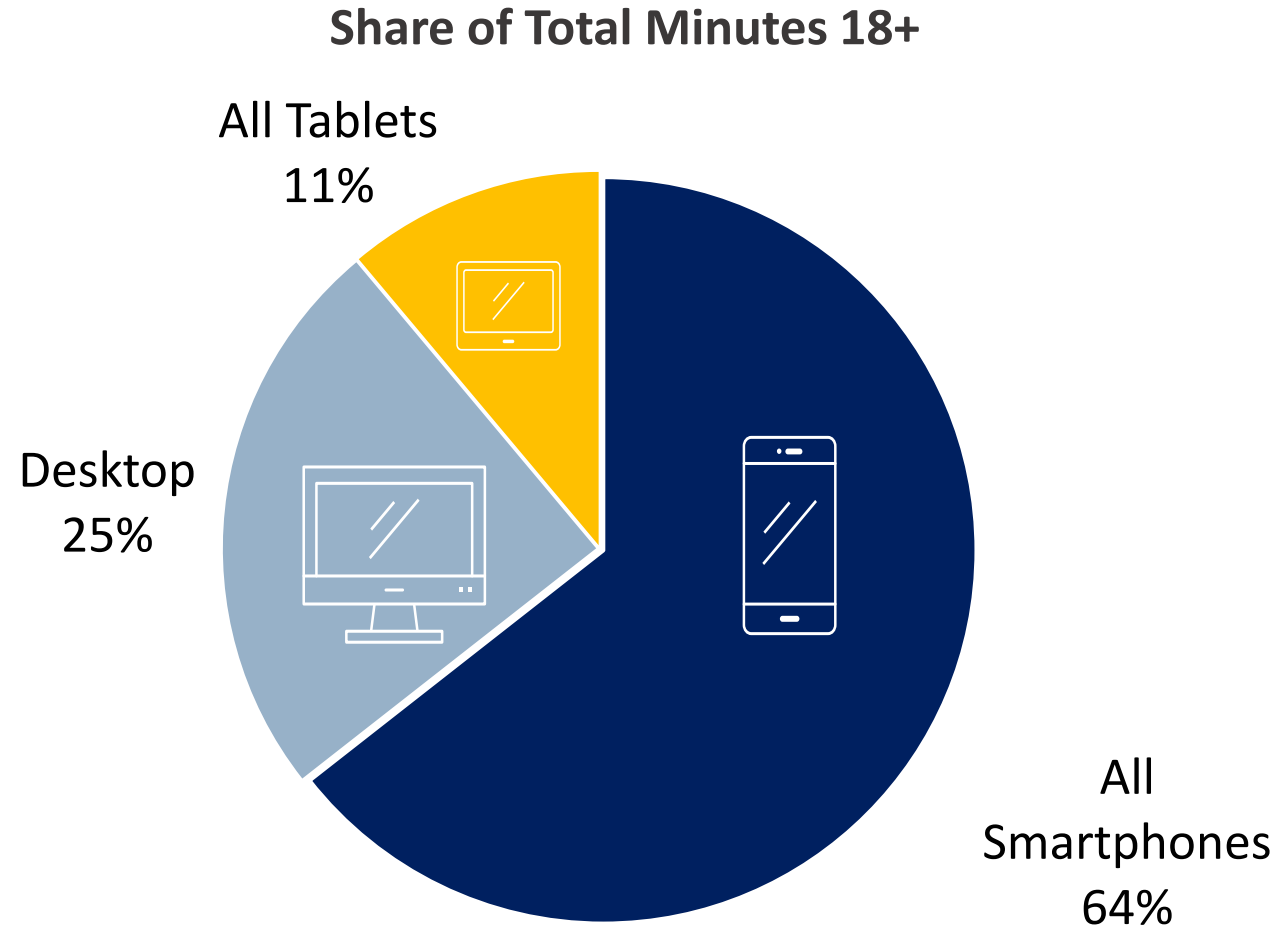


Total Unique Visitors (000s)

Source: Comscore MMX Multi-Platform, Mar 2019, Desktop age 6+, Mobile age 18+  
 MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. Desktop refers to 'desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

# Share of Minutes by Platform

Mobile Devices now account for **75%** of all adult online minutes



Source: Comscore MMX Multi-Platform, Mar 2019, UK, Adults 18+  
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

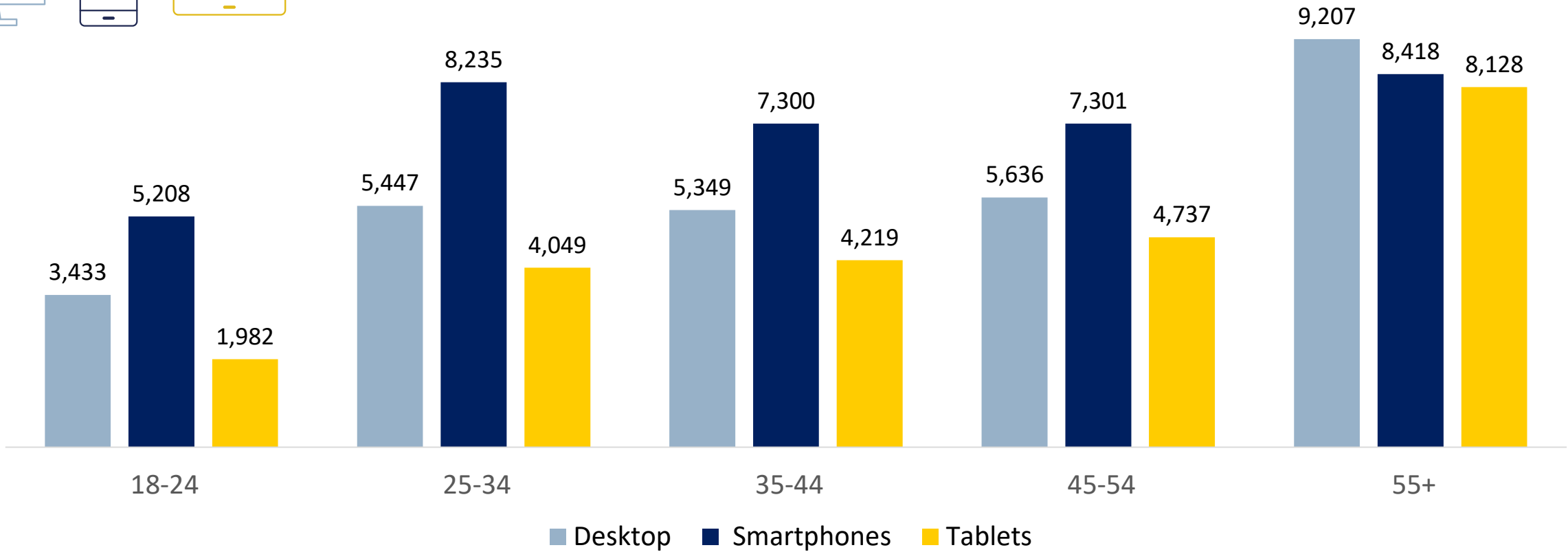
\*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

# Platform Unique Visitors by Age

## The Desktop has higher reach amongst Older Audiences

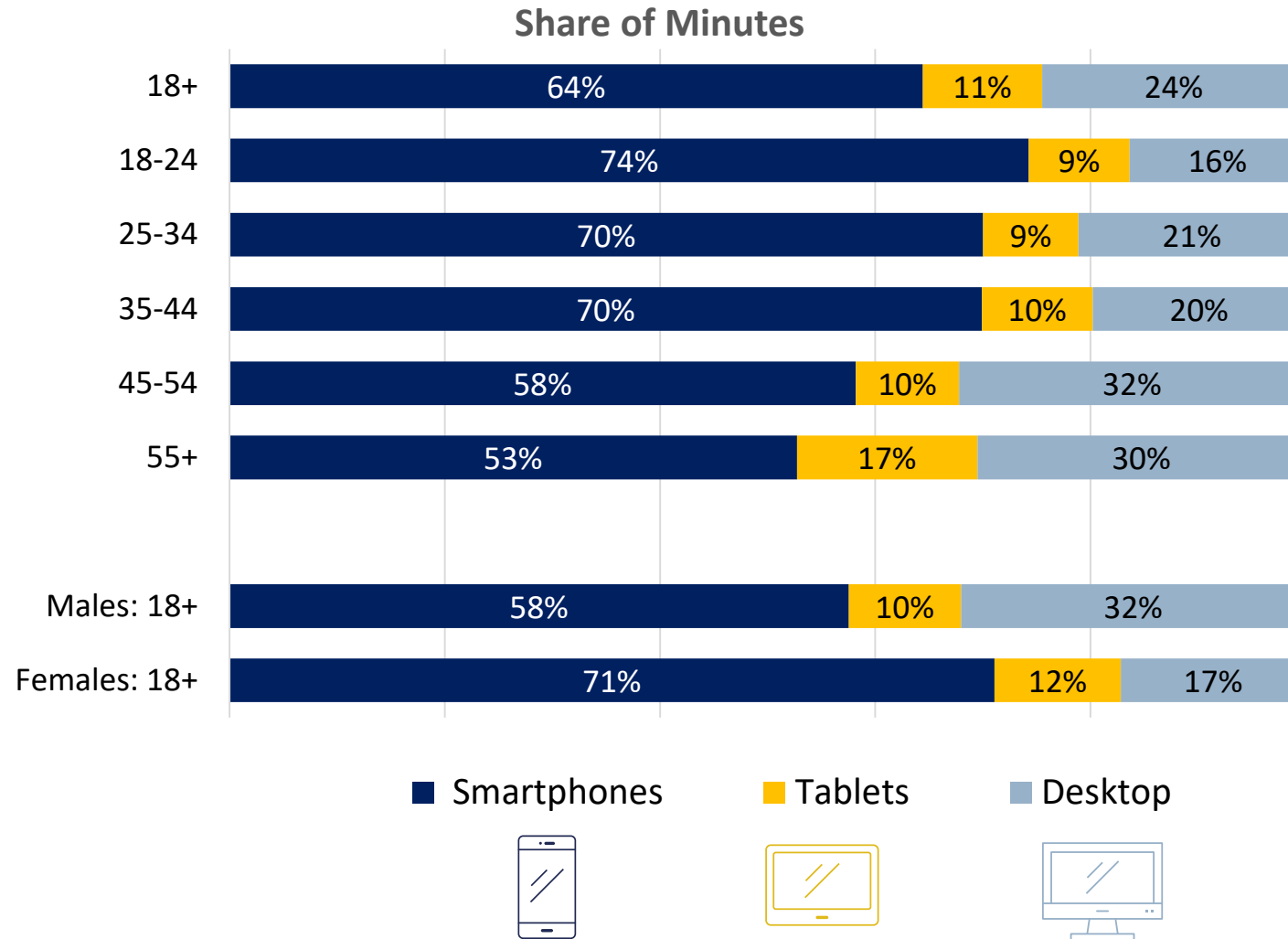


Audience by Platform by Age - Unique Visitors (000s)



# Platform Share of Minutes by Age & Gender

## Millennials & females spend greatest share of time on mobile devices

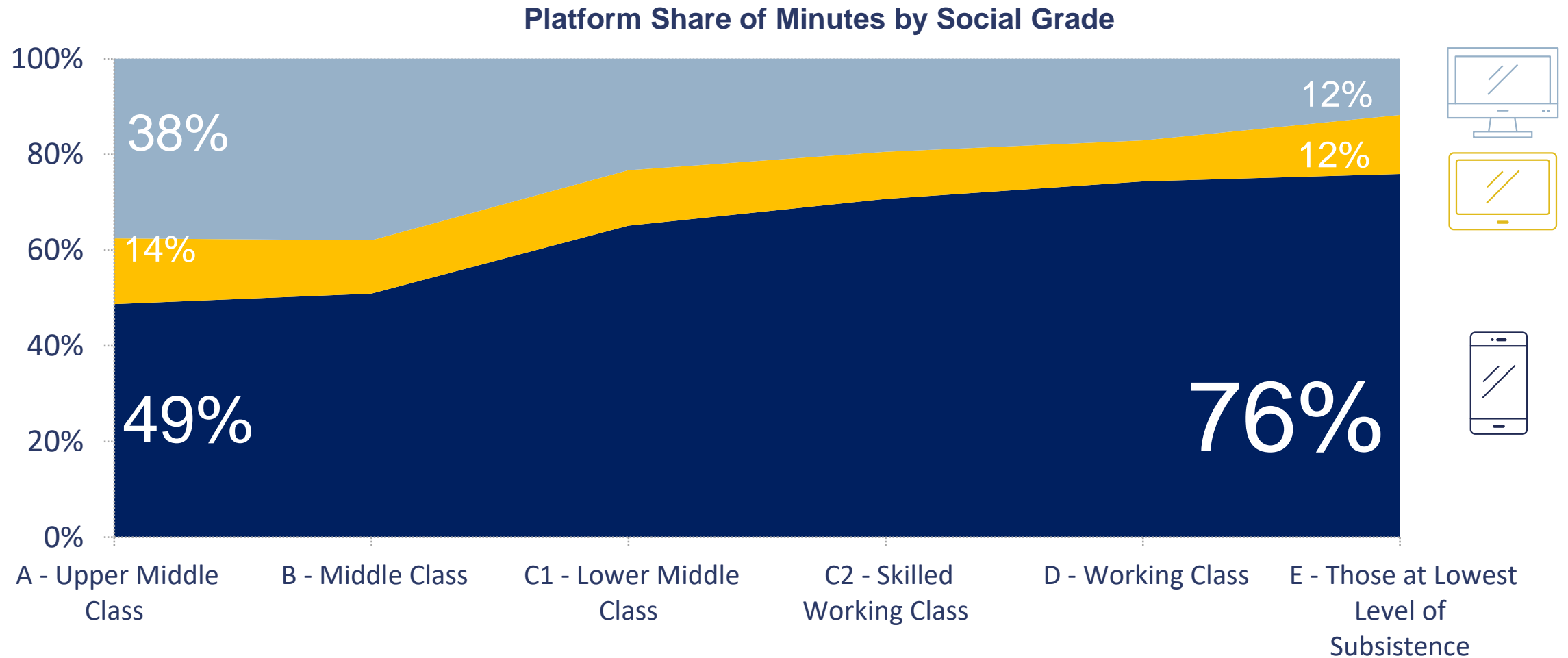


Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 83% of their time online on mobile devices compared to only 68% for males.

# Platform Share of Time Online by Social Grade

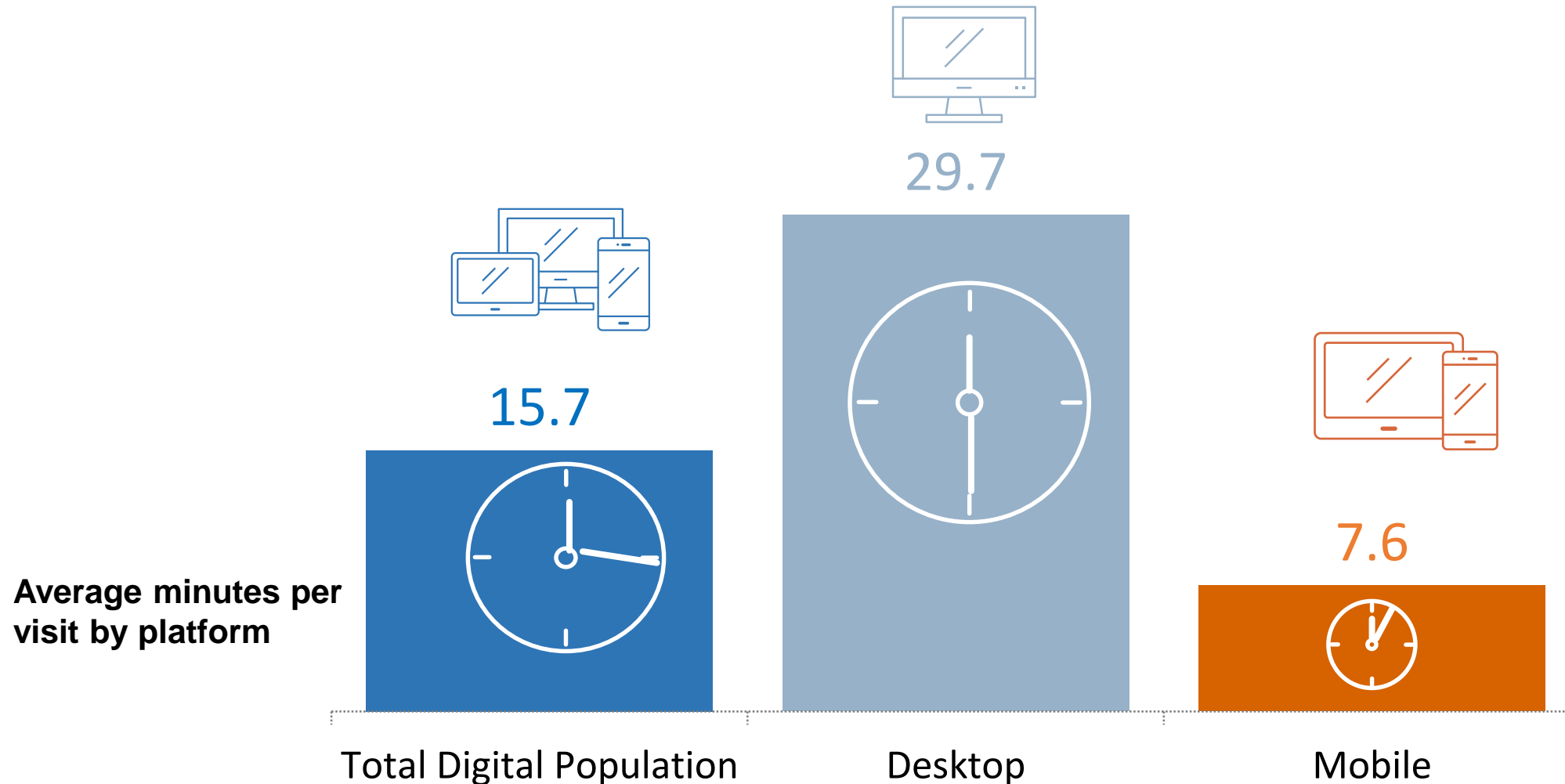
Smartphone share increases with decreasing social grade





# Average Minutes per Visit by Platform

Mobile visits are **shorter**



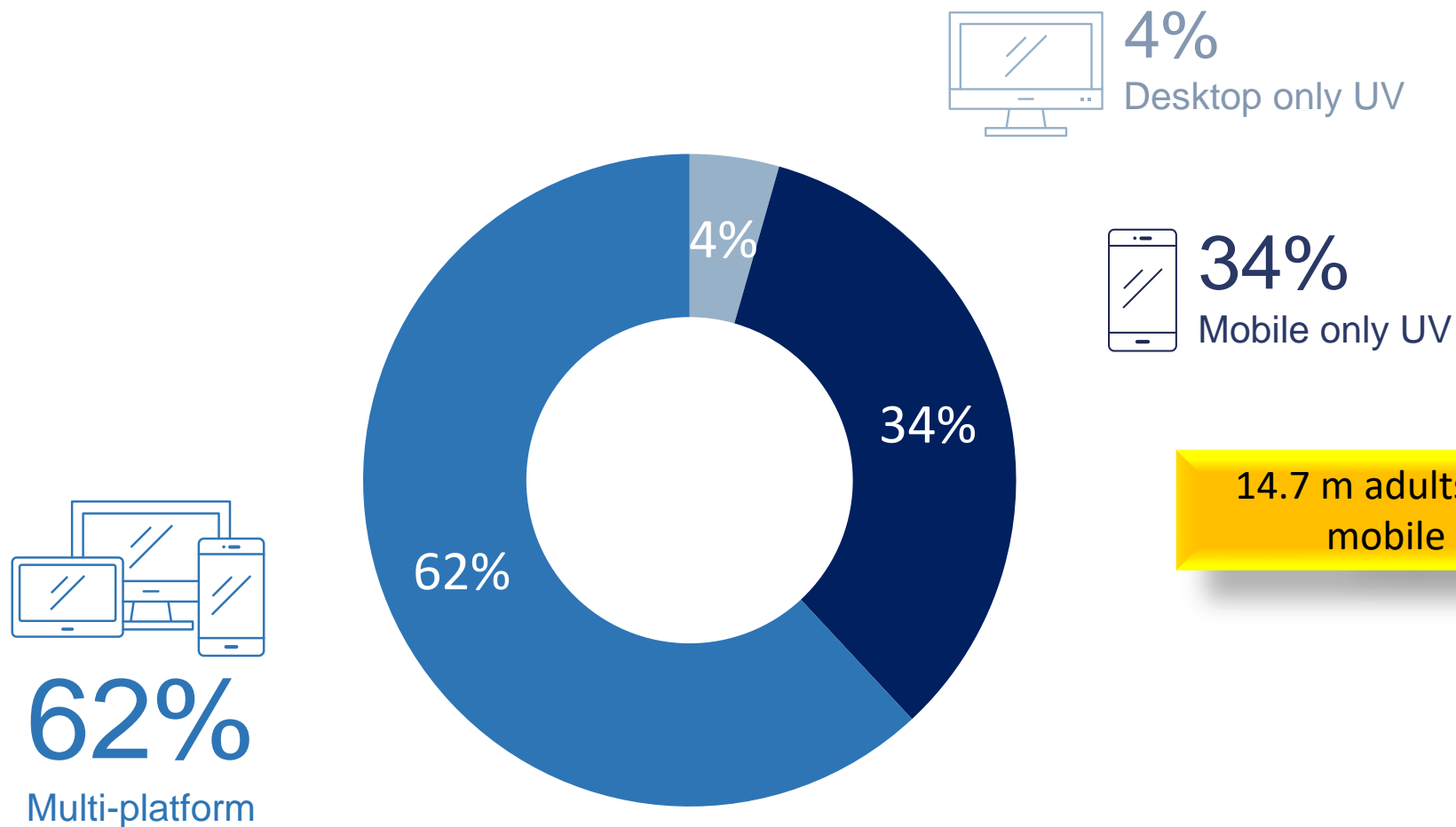
Average minutes per visit by platform



# Multi-Platform Usage

# Multi-Platform Usage

## A third of UK Adults are now Mobile Only

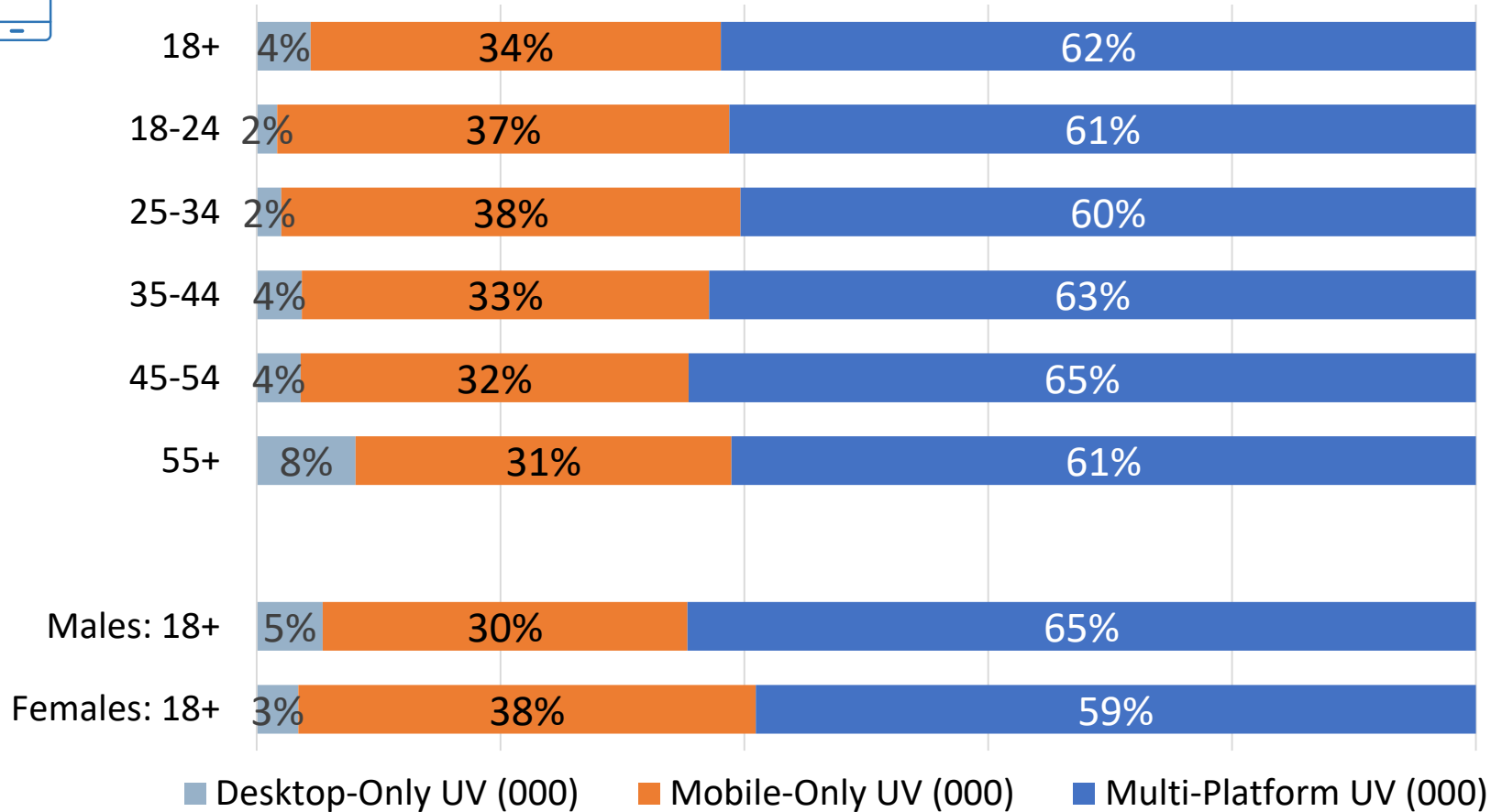


# Multi-Platform usage by age and gender

## 55+ are more likely to only use a desktop PC



Unique Viewers by Platform by Age & Gender



55+ are least likely to be multi-platform

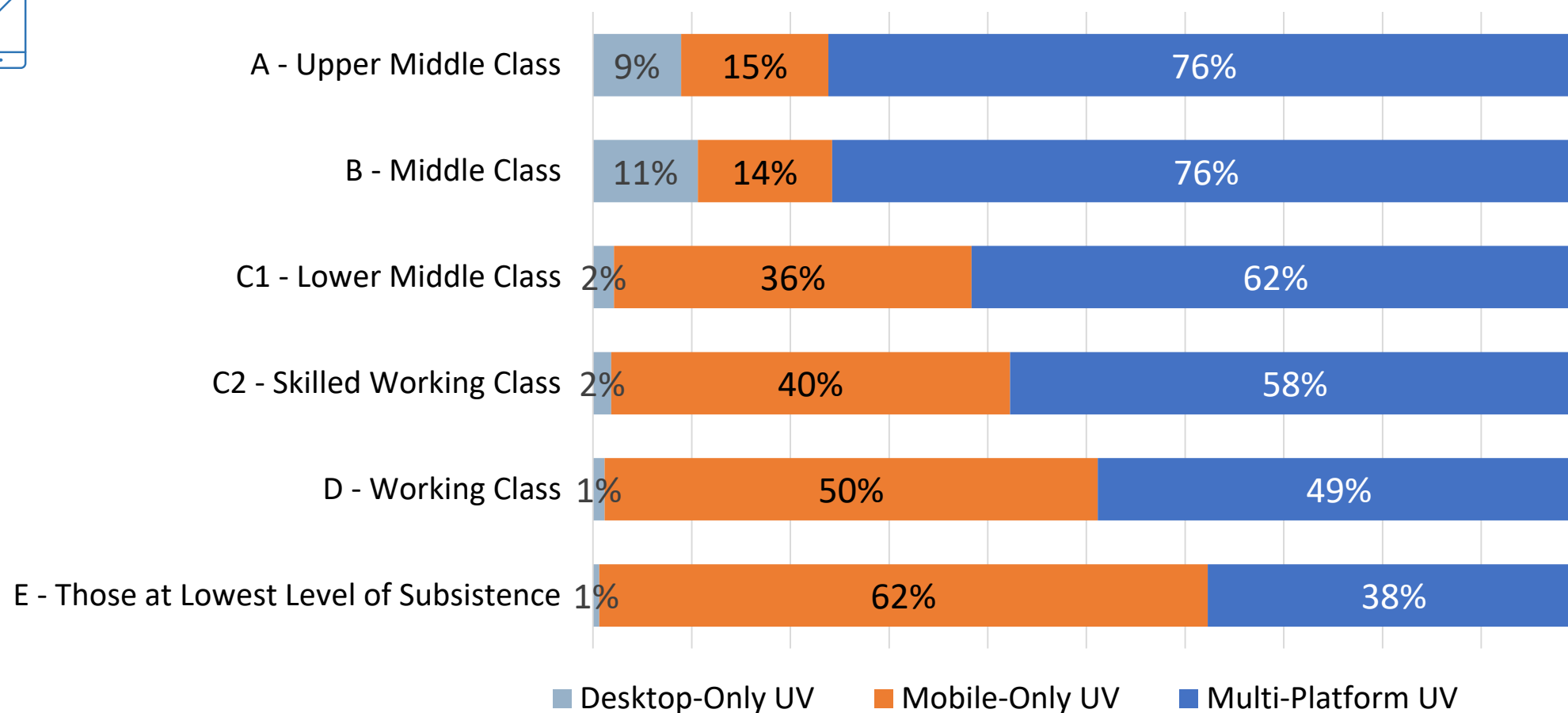
Females are more likely to be 'Mobile Only'

# Multi-Platform usage by social grade

## Lower social grades are least likely to be multi-platform



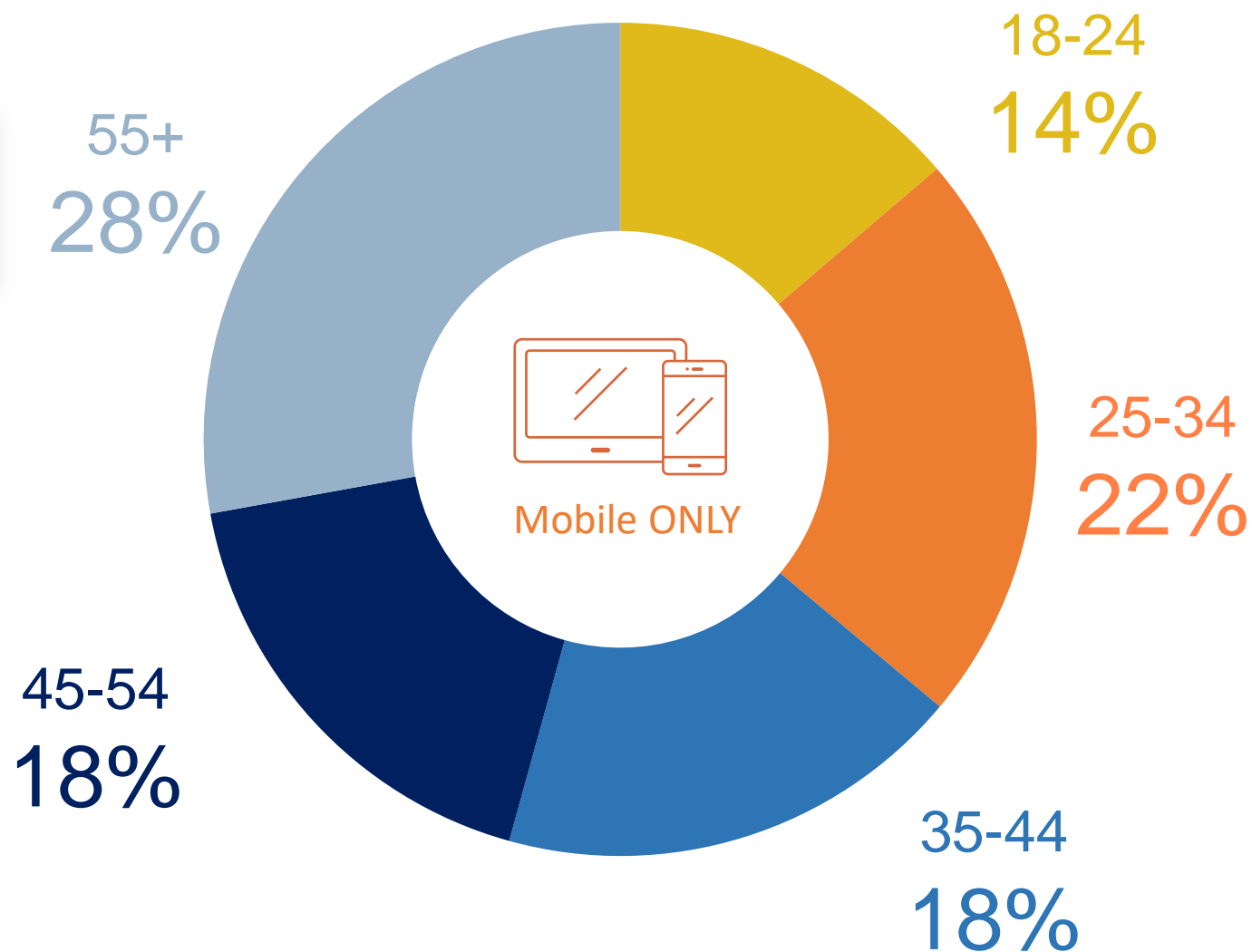
### Unique Viewers by Platform by Age & Gender



# Mobile Only Audience Unique Visitors by Age

The 'mobile only' audience is split across all age ranges

Tablets drive up 55+ share of the Mobile Online Audience



Source: Comscore MMX Multi-Platform, Mar 2019, UK Adults 18+

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps



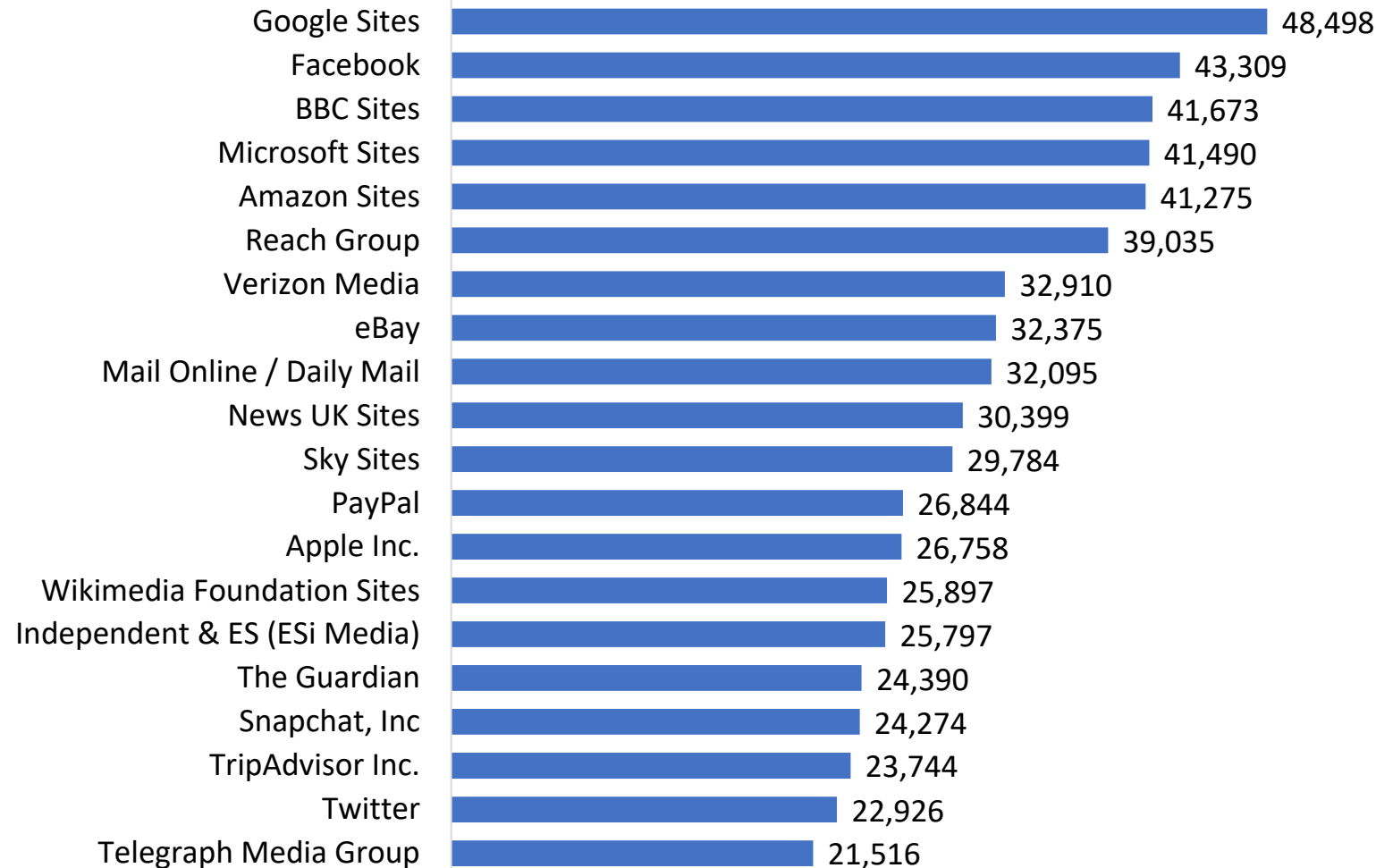
# Top Properties: Total Digital Population

# Top 20 Properties by 'Unique Visitors' - Total Digital Population

## Google reaches 98.5% of the UK Online population



Total Unique Visitors/Viewers (000s) = 49,254

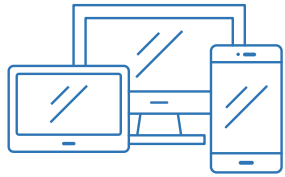


The top 5 properties all have online reach over 80%

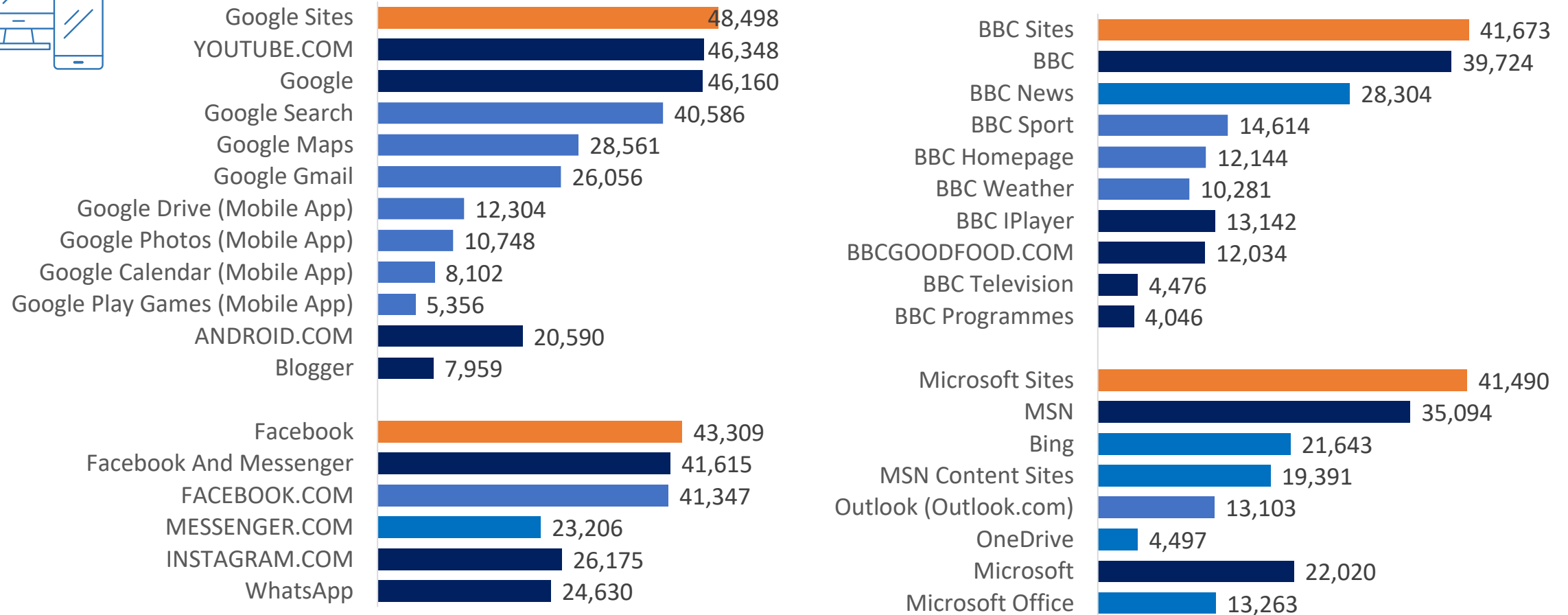


# Audience Breakdown of Top 4 Sites

YouTube alone reaches more than all Facebook properties combined

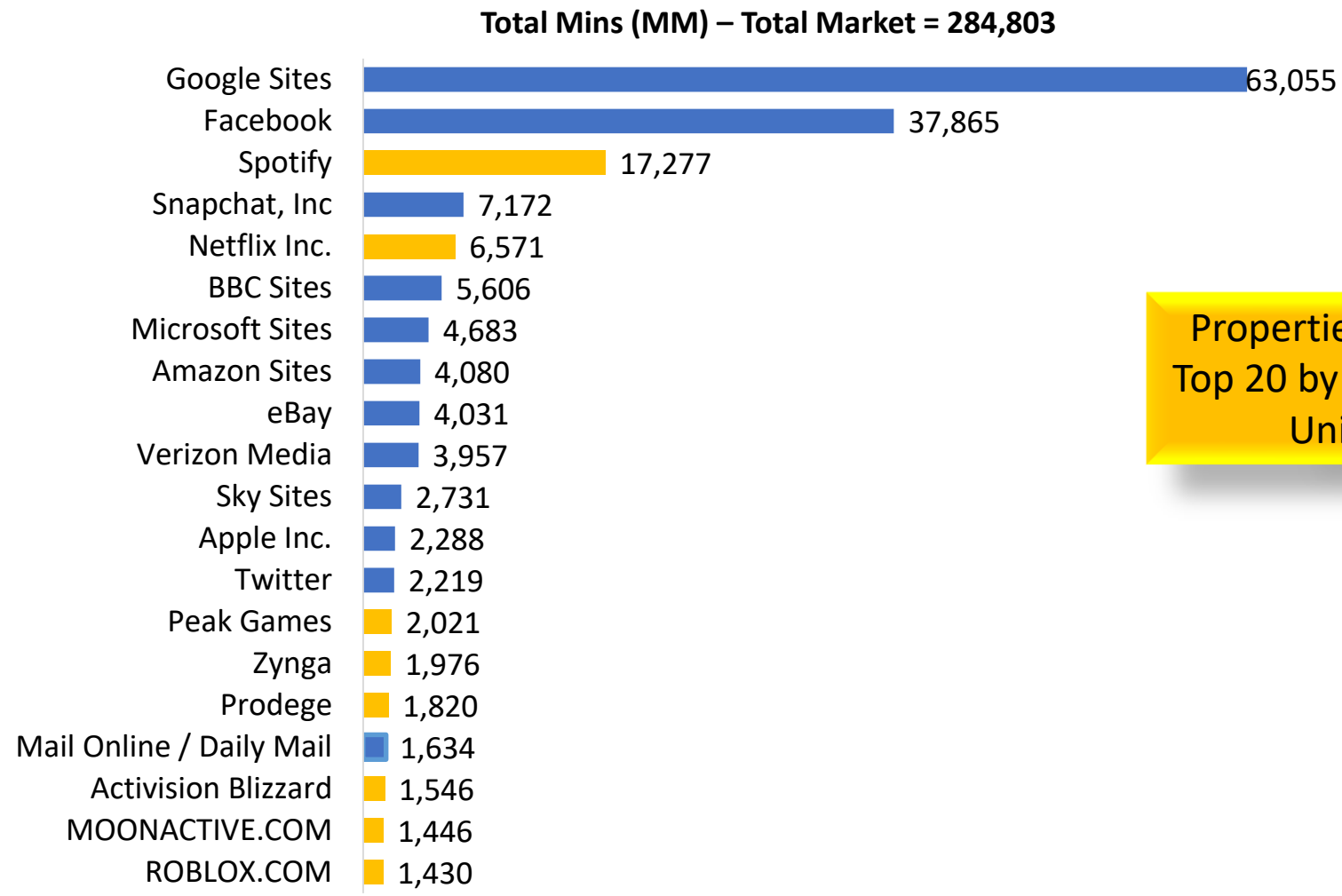


Total Unique Visitors (000)



# Top 20 Properties by 'Time Spent\*' – Total Digital Population

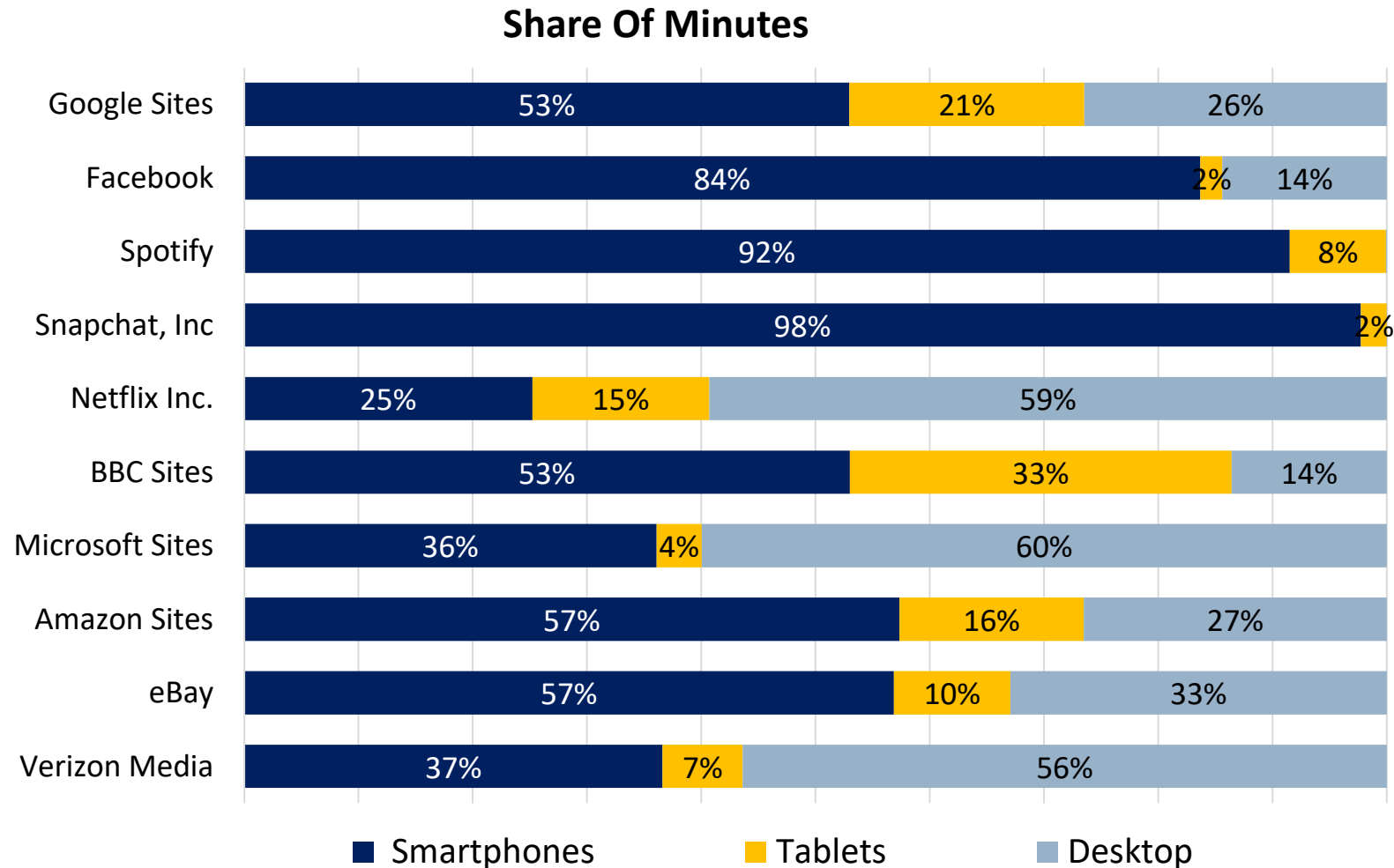
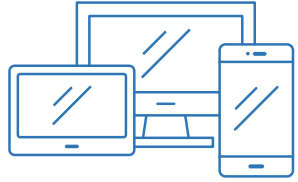
## Entertainment (games/music/TV) & social media sites drive minutes



Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

# Share of Adults' Time Online by Platform for Top 10 'Time Spent' Properties

## Mobile devices account for over 90% of time spent on Spotify & Snapchat



Snapchat & Spotify have the greatest share of time on mobile devices

BBC & Google (Inc YT) have highest Tablet share out of top 10

Majority of time spent online for Microsoft & Verizon Media is on the desktop

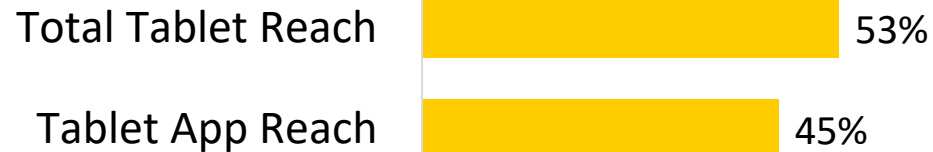


# Mobile usage

# Mobile Reach by Platform & Access

89% of the UK online adult population use mobile apps

Reach of Online UK Population - Mar 2019, 18+



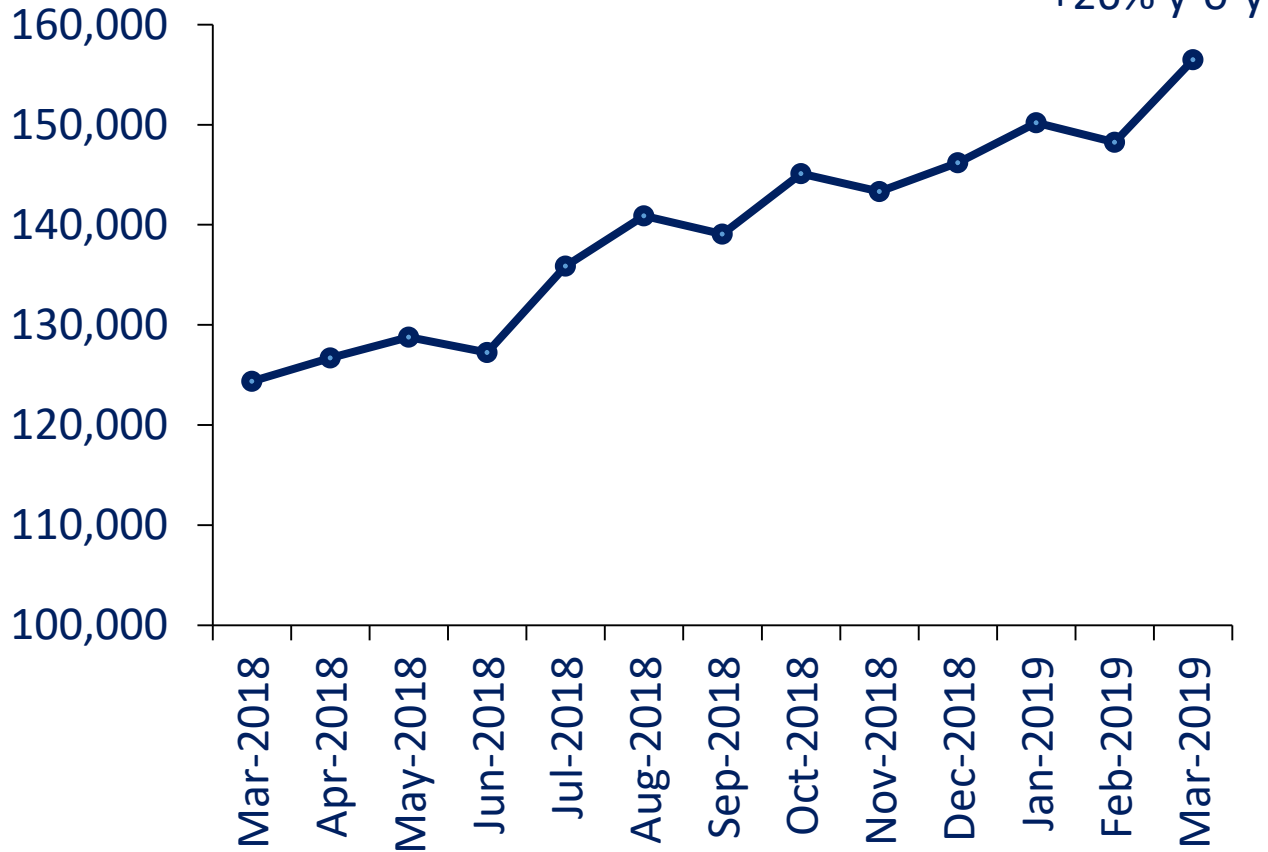
Source: Comscore MMX Multi-Platform, Mar 2019, UK, Adults 18+  
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

\*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

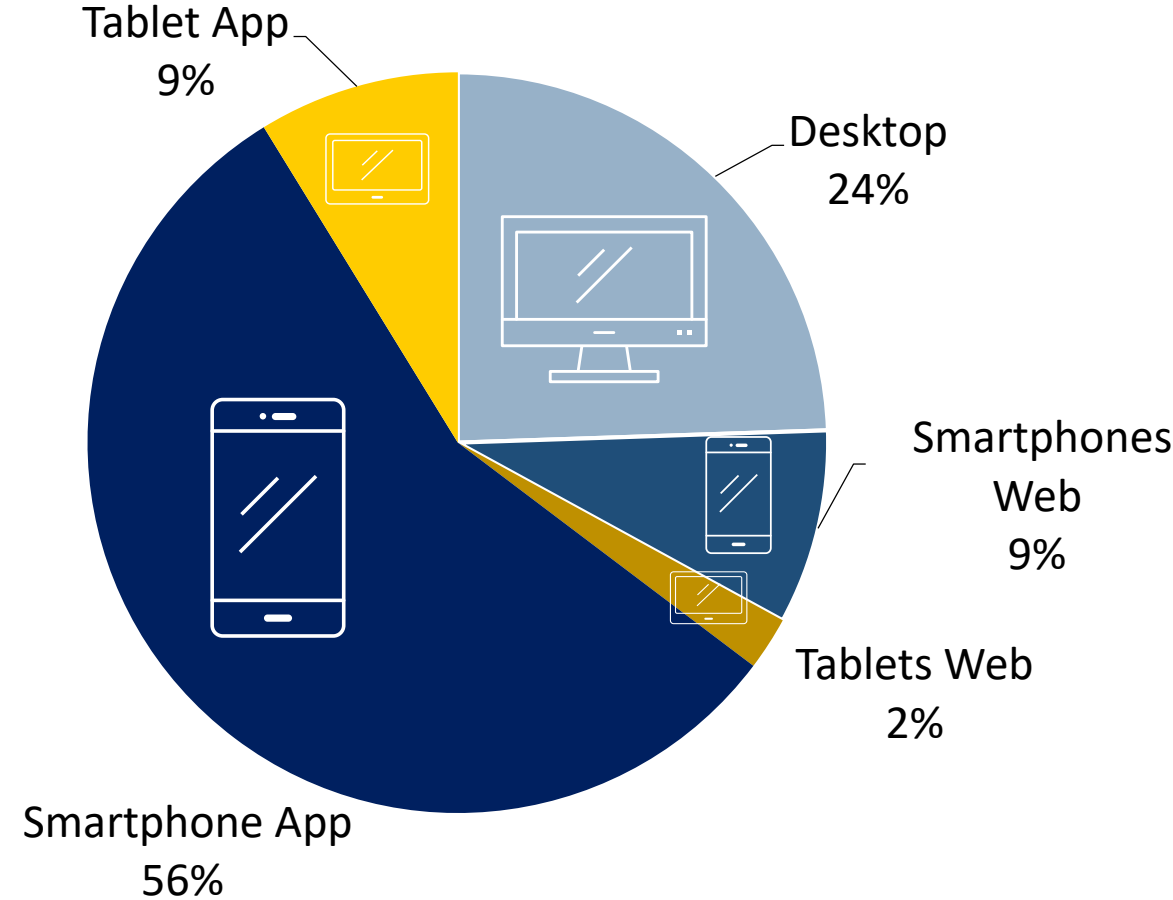
# Minutes by Platform & Mobile Access

## Smartphone apps account for 56% of all Minutes

### Smartphone App Total Minutes



### Share of Total Minutes



Source: Comscore MMX Multi-Platform, Mar 2019, UK, Adults 18+  
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

\*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

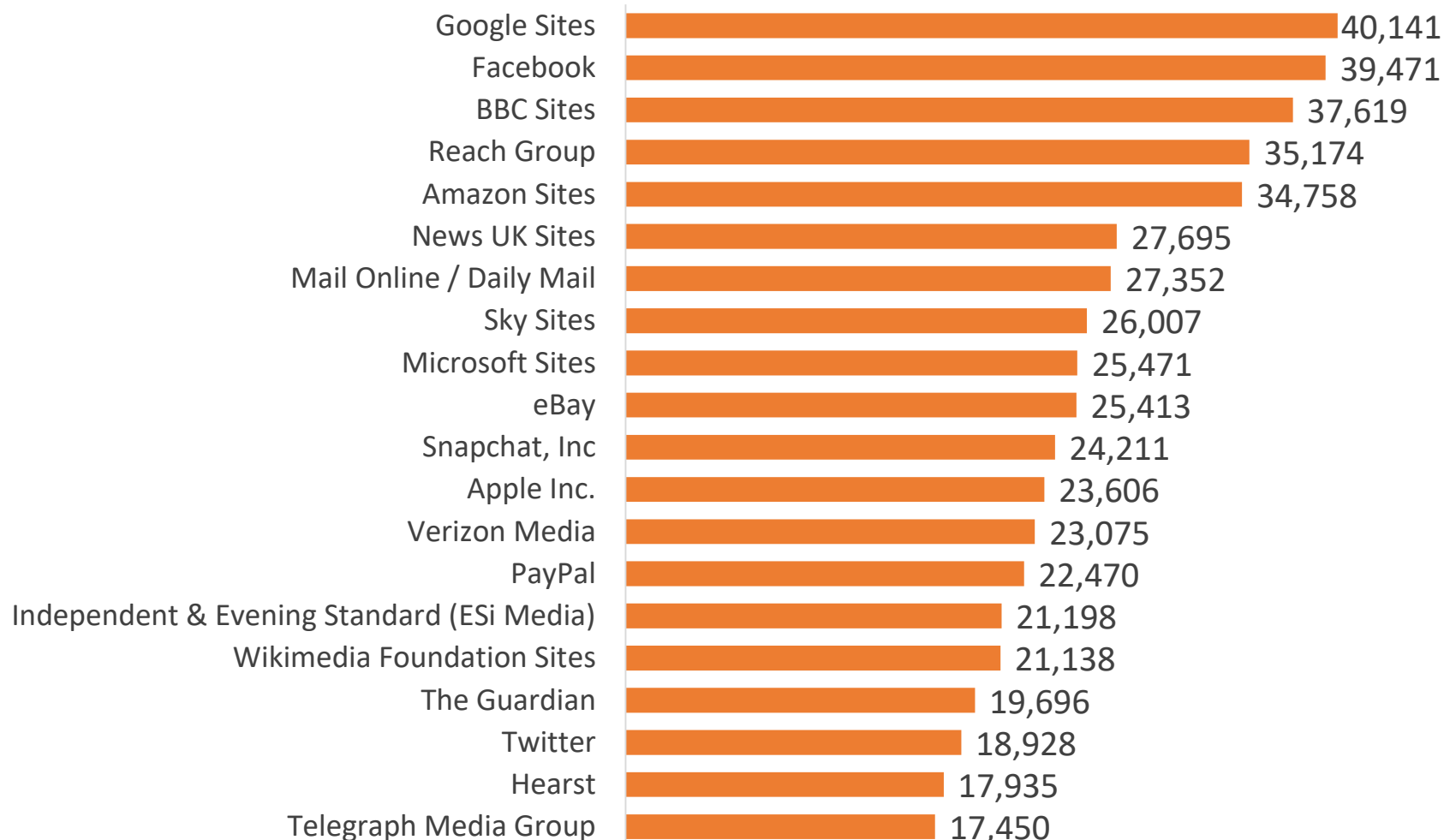


# Top Properties: Mobile Population

# Top 20 Mobile Properties ranked by Unique Visitors

41.9m adults accessed mobile content in Mar 2019 (via browser and app)

Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 41,874



Source: Comscore Mobile Metrix, Mar 2019, UK, Age 18+. Please note that 'mobile' includes smartphone and tablet usage combined. Due to a tagging issue, [M] SoundCloud (Mobile App) was over-reported for Mobile Metrix and MMX Multi-Platform during December 2018 - March 2019. UK data so has been excluded.

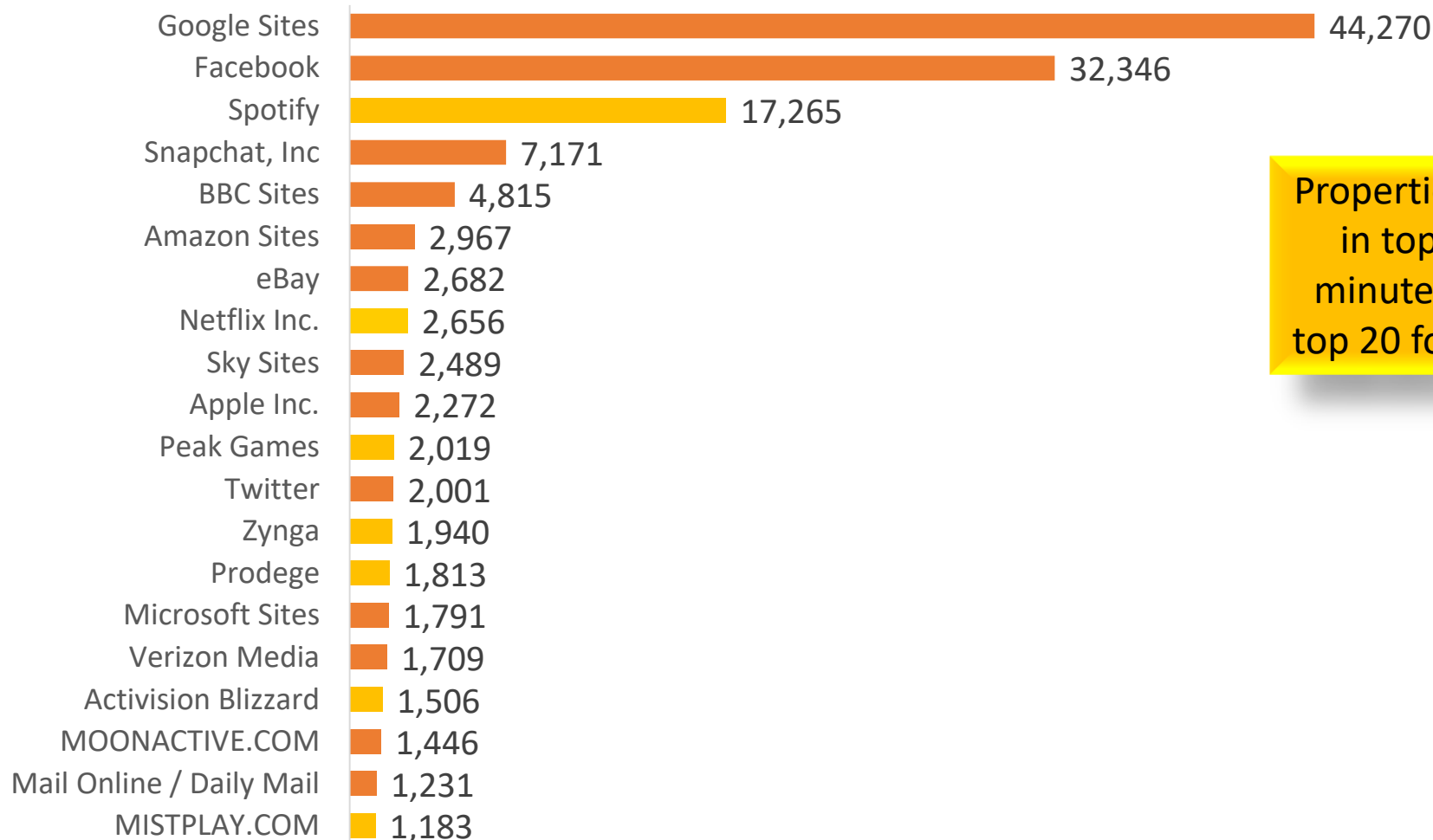


# Top 20 Mobile Properties ranked by minutes

## Entertainment & Games sites more likely to feature in 'time online' top 20



Total Minutes (MM) Total Mobile (18+) = 200,283



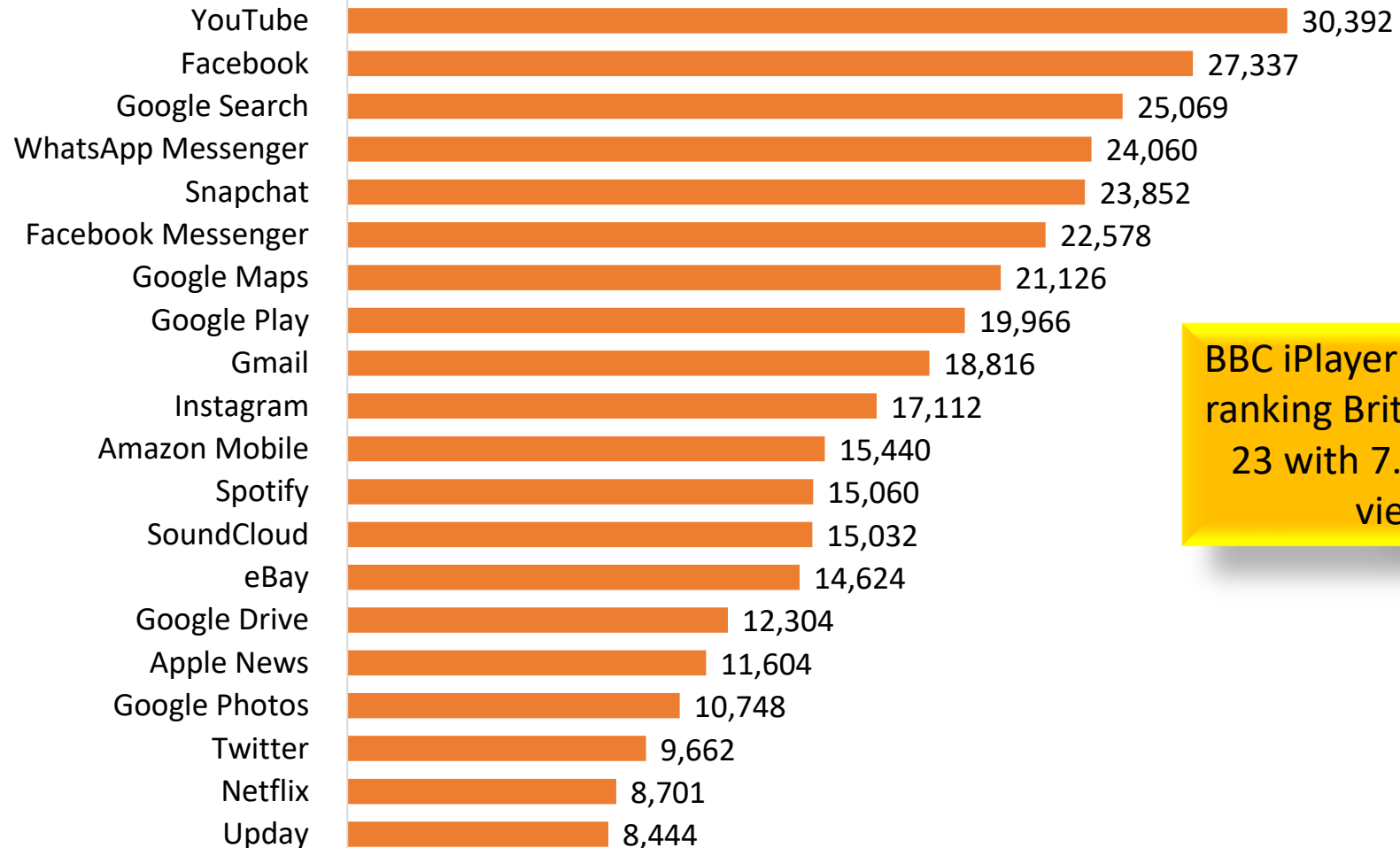
Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

# Top 20 Mobile Apps (Tablet & Smartphone) ranked by Unique Visitors

## Global Brands dominate top 20 Apps



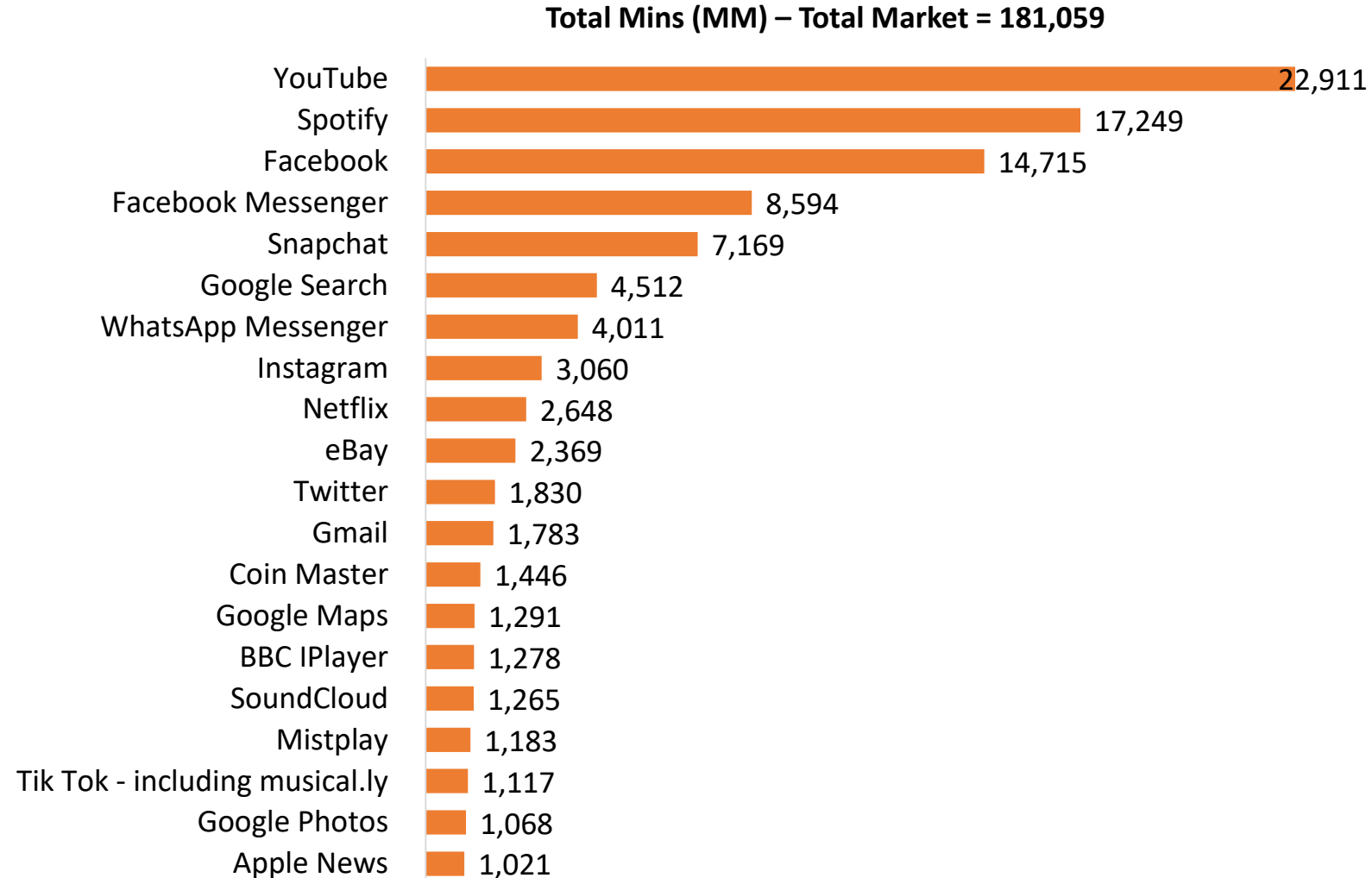
Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 38.8m



BBC iPlayer is the highest ranking British app at no. 23 with 7.2m monthly viewers

# Top 20 Mobile (Tablet & Smartphone) Apps ranked by Minutes

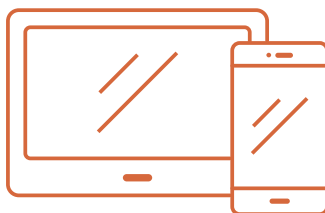
Spotify & Netflix are in the top 10 for minutes spent on apps



# Top 10 Mobile Apps by Unique Visitors split by Platform

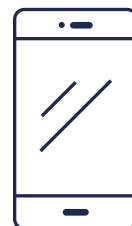
9 of the top 10 apps are owned by Google or Facebook

## Total Mobile Top 10



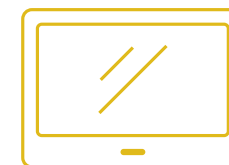
	(Million)
YouTube	30.4
Facebook	27.3
Google Search	25.1
WhatsApp Messenger	24.1
Snapchat	23.9
Facebook Messenger	22.6
Google Maps	21.1
Google Play	20.0
Gmail	18.8
Instagram	17.1

## Smartphone Top 10



	(Million)
• YouTube	26.6
• Facebook	24.7
• WhatsApp Messenger	23.7
• Google Search	23.2
• Facebook Messenger	21.6
• Google Maps	20.0
• Google Play	20.0
• Snapchat	18.3
• Gmail	17.8
• Instagram	15.4

## Tablet Top 10

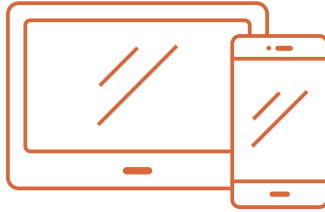


	(Million)
• Snapchat	7.5
• YouTube	5.8
• Facebook	3.8
• BBC IPlayer	3.4
• Google Search	2.6
• Instagram	2.4
• Netflix	2.4
• Apple News	2.3
• Spotify	2.2
• BBC Weather	1.8

# Top 10 Mobile Apps by Minutes by Mobile Platform

## Spotify, Netflix & eBay enter the top 10 for Minutes

### Total Mobile Top 10



	(Million)
YouTube	22.9
Spotify	17.2
Facebook	14.7
Facebook Messenger	8.6
Snapchat	7.2
Google Search	4.5
WhatsApp Messenger	4.0
Instagram	3.1
Netflix	2.6
eBay	2.4

### Smartphone Top 10



	(Million)
• Spotify	15.8
• YouTube	15.1
• Facebook	14.3
• Facebook Messenger	8.6
• Snapchat	7.0
• WhatsApp Messenger	4.0
• Google Search	3.3
• Instagram	3.0
• eBay	2.1
• Twitter	1.6

### Tablet Top 10



	(Million)
• YouTube	7.8
• Spotify	1.5
• Google Search	1.2
• Netflix	1.0
• BBC IPlayer	0.8
• Facebook	0.4
• YouTube Kids	0.4
• eBay	0.3
• Amazon Prime Video	0.3
• BBC News	0.3



# Categories

# Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

24%

Auctions	80%
Education	73%
Computer Software	71%
Investments	64%
Fragrances/Cosmetics	61%
Business to Business	58%
Government	54%
Insurance	50%
Green	42%
Autos Manufacturer	40%
Sports/Outdoor	40%
Jewellery/Luxury Goods	38%
Home Furnishings	37%
Airlines	35%
Taxes	35%



Smartphone total

64%

• Instant Messenger	99%
• Gay/Lesbian	96%
• Car Transportation	95%
• Consumer Electronics	94%
• Job Search	94%
• Coupons/Incentives	93%
• Diet & Exercise/Fitness Tracker	92%
• Maps/GPS/Traffic	91%
• Retail - Music	90%
• Payments	89%
• Entertainment - Music	88%
• Health	87%
• Dating	87%
• Social Media	86%
• Weather	84%



Tablet total

11%

Kids	34%
Family & Youth	27%
General News	25%
Entertainment	21%
News/Information	21%
Search/Navigation	17%
Books	16%
Online Gaming	16%
Games	15%
Real Estate	15%
Hotel/Resort & Home Sharing	14%
Toys	14%
Local News	13%
Entertainment - News	13%
Sports	13%

Source: Comscore MMX Multi-Platform, Mar 2019, UK, Adults 18+

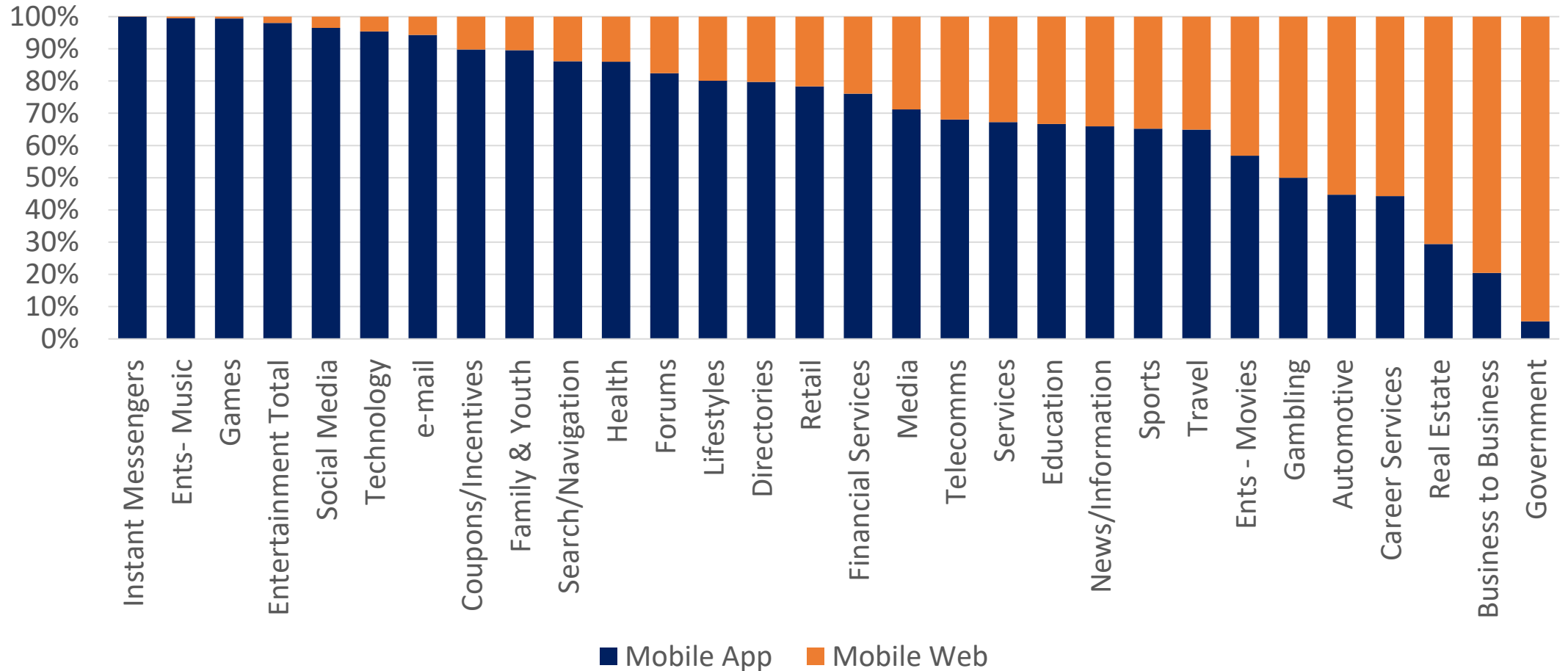
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

# Share of Mobile Minutes by Access Type by Category

## Mobile App share of minutes varies by content & service



Mobile App v Mobile Web Share of Mobile Minutes

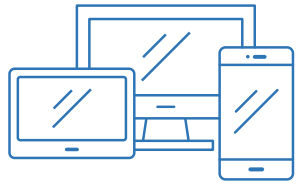




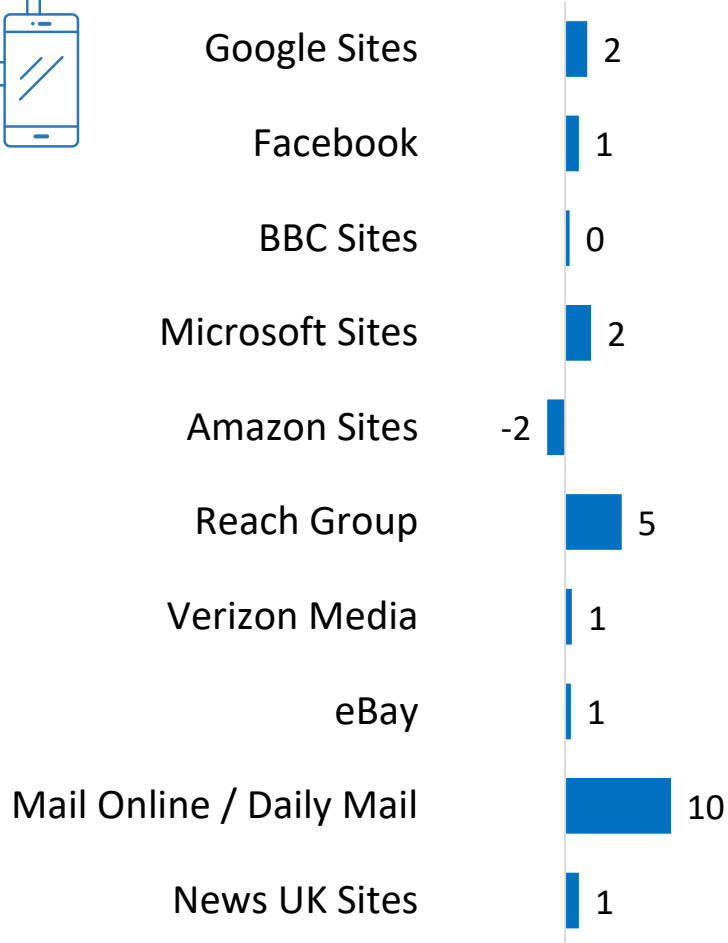


Key Changes: Mar 19 v Dec 18

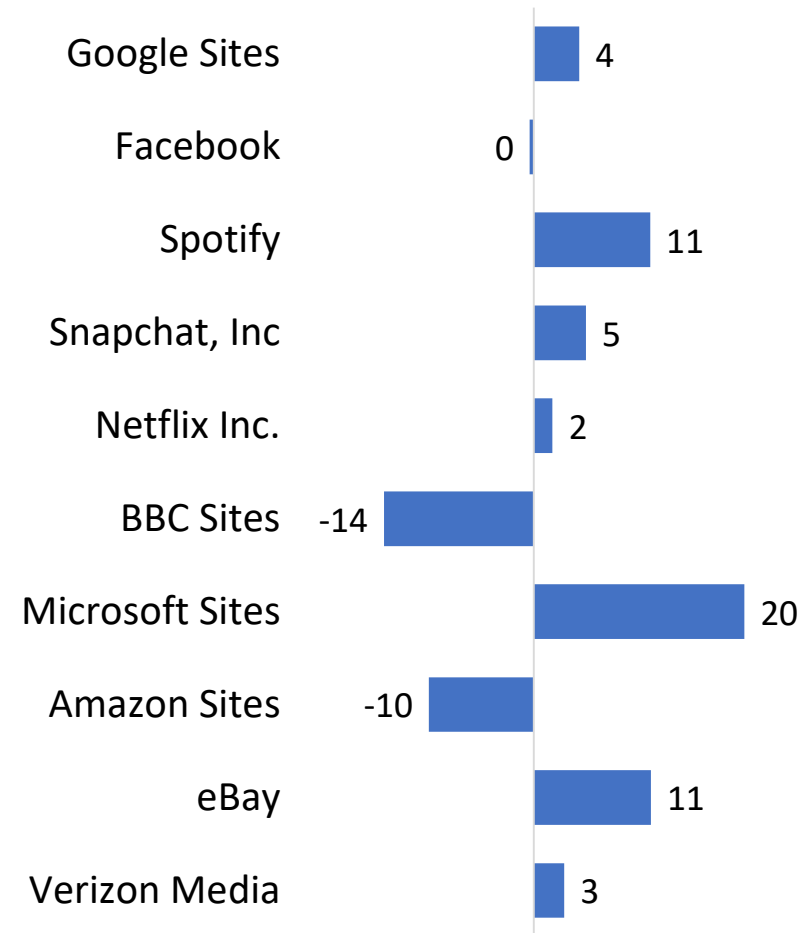
# % Change for Top Unique Visitor and Time Spent Properties: Mar 19 v Dec 18



## Top 10 Unique Visitor Properties: UV % Change



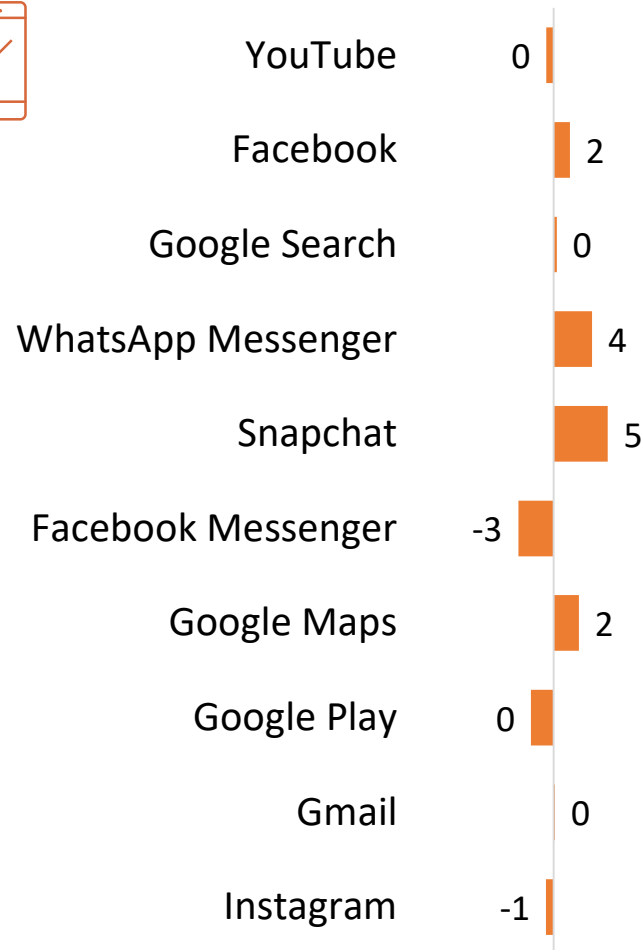
## Top 10 Time Spent Properties: Minutes % Change



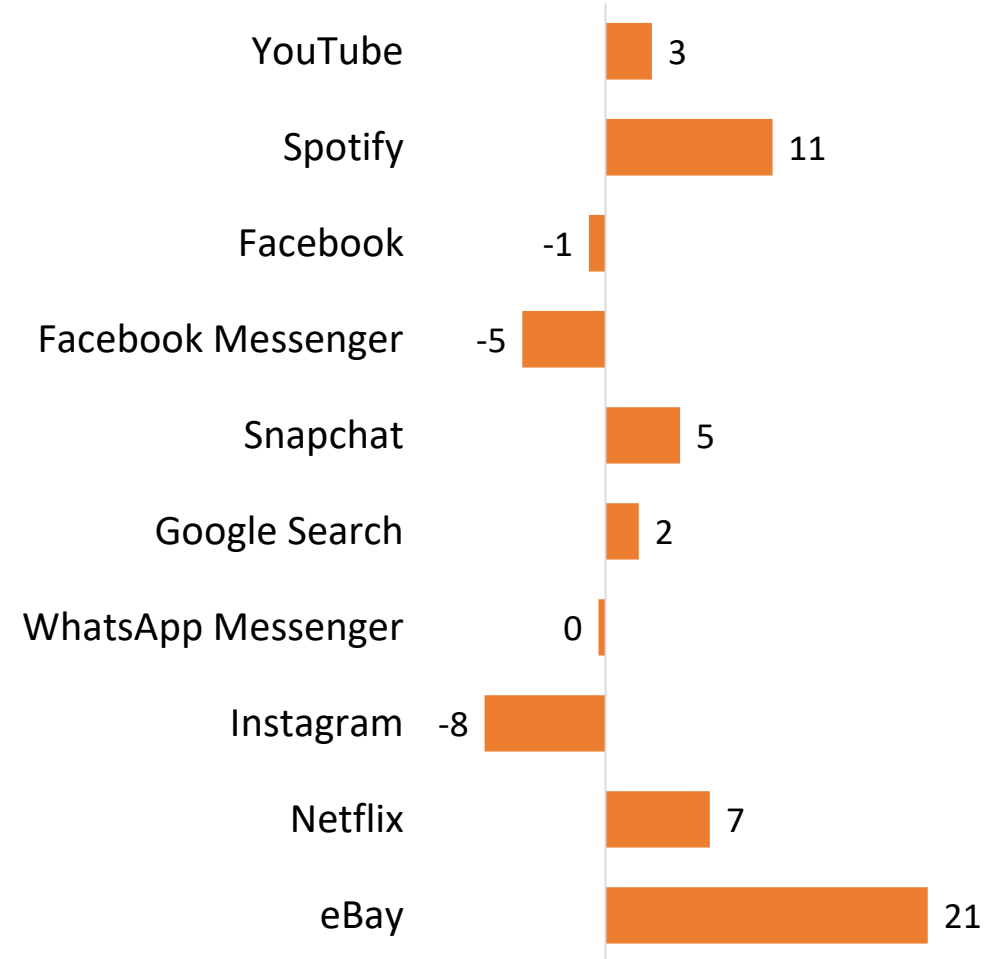
# % Change for Top Unique Visitor and Time Spent Mobile Apps: Mar 19 v Dec 18



## Top 10 Unique Visitor Mobile Apps: UV % Change



## Top 10 Time Spent Mobile Apps: Minutes % Change

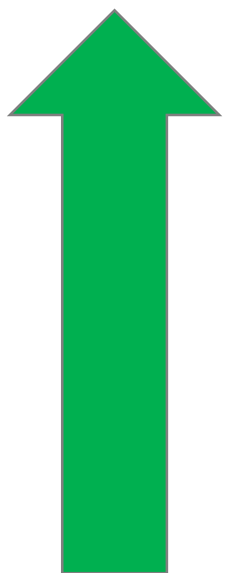


Source: Comscore MMX Multi-Platform, Mar 2019 v Dec 2018, Desktop 6+, Mobile age 18+

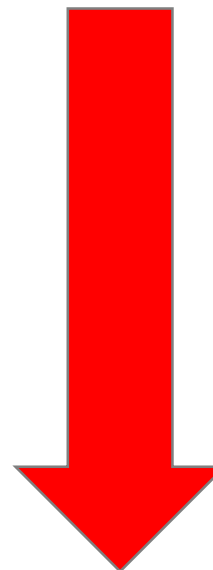
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

# Audience Winners and Losers within Top 1000 Properties

## Unique Visitor Growth & Decline: Mar 19 v Dec 18



	<b>Additional Unique Visitors (000s)</b>
PARLIAMENT.UK	+3,129
Rightmove Sites	+3,041
TripAdvisor Inc.	+2,991
Mail Online / Daily Mail	+2,897
WWW.GOV.UK	+2,836

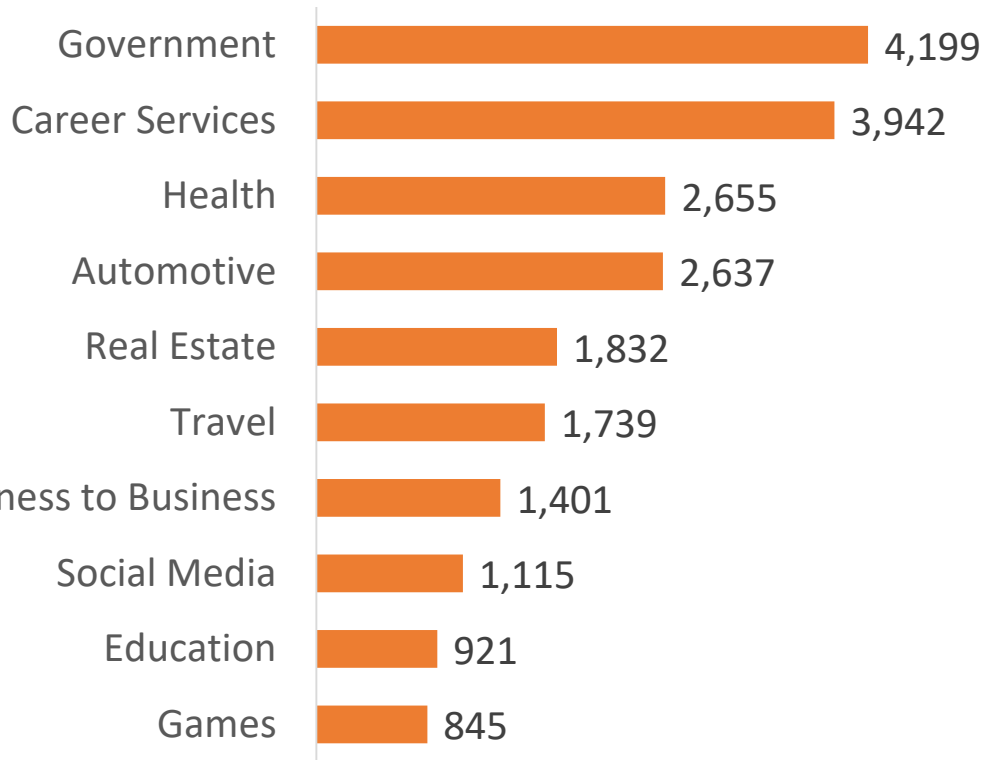


	<b>Unique Visitor Decline (000s)</b>
Wal-Mart	-3,546
John Lewis Partnership	-3,631
DSG Retail Limited	-3,681
Boots Plc	-4,285
Sainsburys	-6,384

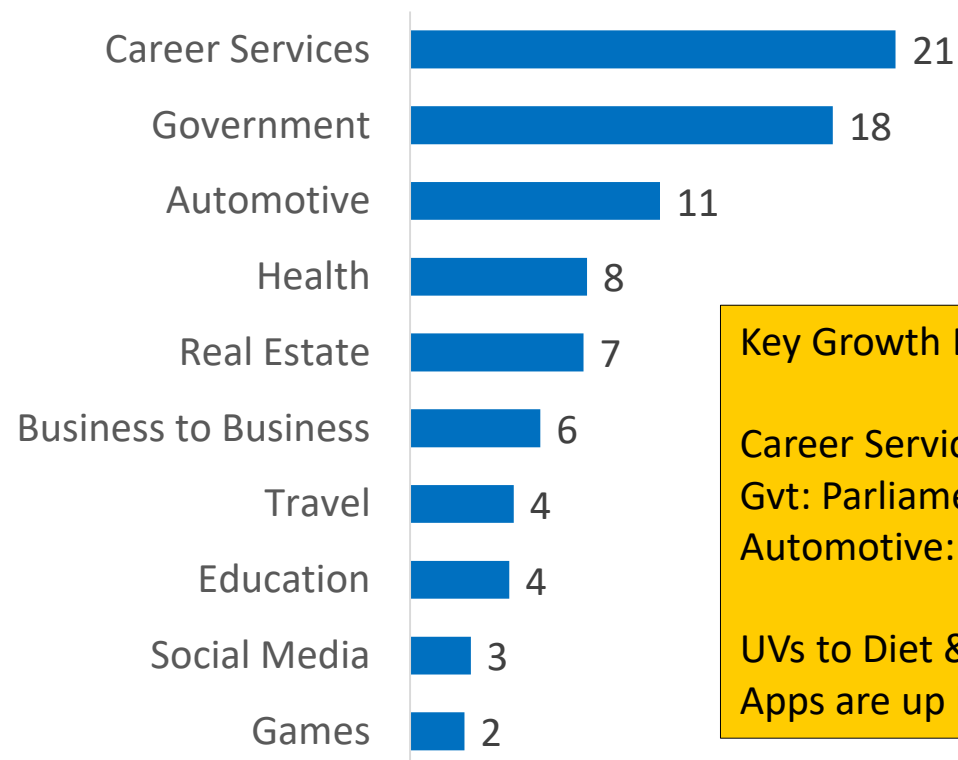
# Top Performing Categories based on Visitor Growth Mar 19 v Dec 18

## Category UV Growth – Mar 19 v Dec 18

Unique Visitor 000s Increase: Mar 19 v Dec 18



Unique Visitor % Increase: Mar 19 v Dec 18



**Key Growth Drivers:**

- Career Services: Indeed (+2.2m)
- Gvt: Parliament.uk (+3.1m)
- Automotive: Autotrader (1.3m)

UVs to Diet & Exercise Tracker Apps are up by 25% within Health

# Questions?

Find out more at: <http://www.ukom.uk.net/>  
Email us at: [insights@ukom.uk.net](mailto:insights@ukom.uk.net)

# Methodology and Definitions

- This report utilises data from the Comscore suite of UKOM approved products, namely Comscore MMX, Comscore Video Metrix and Comscore MMX Multi-Platform, as well as Comscore Mobile Metrix which is pending UKOM approval.
- **Comscore MMX Multi-Platform®**  
Comscore MMX Multi-Platform® offers comprehensive reporting on more than 300,000 digital media entities, including their unduplicated audience size, demographic composition, engagement, performance within key user segments and behavioral trends. All of these metrics are measured across multiple digital media platforms, including desktop computers, smartphones and tablets, and content delivery vehicles, including websites, videos and apps. These platforms are unified using both panel- and census-based methods to deliver a holistic view of media companies' total digital populations. *For more information, please visit: <http://www.Comscore.com/Products/Audience-Analytics/Media-Metrix-Multi-Platform>*
- **Comscore MMX®** The Comscore MMX® suite of syndicated products sets the standard for digital audience measurement and media planning. It is powered by Unified Digital Measurement™, the measurement approach that bridges panel-based and website server-based metrics to account for browsing on PC. MMX delivers the accurate suite of audience metrics, providing valuable demographic measures, such as age, gender, household income and household size. MMX reports on more than 35,000 UK properties. *For more information please visit: [http://www.Comscore.com/Products/Audience\\_Analytics/MMX](http://www.Comscore.com/Products/Audience_Analytics/MMX)*
- **Comscore Mobile Metrix®**  
Comscore Mobile Metrix® captures total mobile audience behaviour on browsers and apps across smartphones and tablets. With Mobile Metrix, publishers can demonstrate the value of their mobile audiences, while agencies and advertisers can strategically plan and buy digital advertising on mobile platforms to achieve their campaign objectives. *For more information, please visit: [www.Comscore.com/Products/Audience-Analytics/Mobile-Metrix2](http://www.Comscore.com/Products/Audience-Analytics/Mobile-Metrix2)*
- **Comscore Video Metrix®**  
Comscore Video Metrix® provides transparent, end-to-end video measurement and uses robust duration measurement to reveal engaged time spent viewing online video, along with the unique ability to Separate advertising and content. *For more information, please visit: [http://www.Comscore.com/Products/Audience\\_Analytics/Video\\_Metrix](http://www.Comscore.com/Products/Audience_Analytics/Video_Metrix)*

# About Comscore

**Comscore (NASDAQ: SCOR) is the trusted partner for planning, transacting and evaluating media across platforms. With a data footprint that combines digital, linear TV, over-the-top and theatrical viewership intelligence with advanced audience insights, Comscore allows media buyers and sellers to quantify their multiscreen behavior and make business decisions with confidence. A proven leader in measuring digital and set-top box audiences and advertising at scale, Comscore is the industry's emerging, third-party source for reliable and comprehensive cross-platform measurement. To learn more about Comscore, please visit [www.Comscore.com](http://www.Comscore.com)**

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# About UKOM

**UKOM's objective is to set and oversee the delivery of a credible industry standard for digital audience measurement. That means quantifying audiences in terms of people, not browsers or machines.**

UKOM's governance structure involves all sides of the industry, to ensure that Comscore services meet our collective needs fully and fairly.

The whole UK media industry is involved in setting and overseeing UKOM standards through its Technical and Commercial Committees, and the UKOM Board.

UKOM and Comscore work to an agreed process for product approval, from agreeing concepts, to approved data publication, and continuous assessment.

**Find out more at:**

[www.ukom.uk.net/](http://www.ukom.uk.net/)