

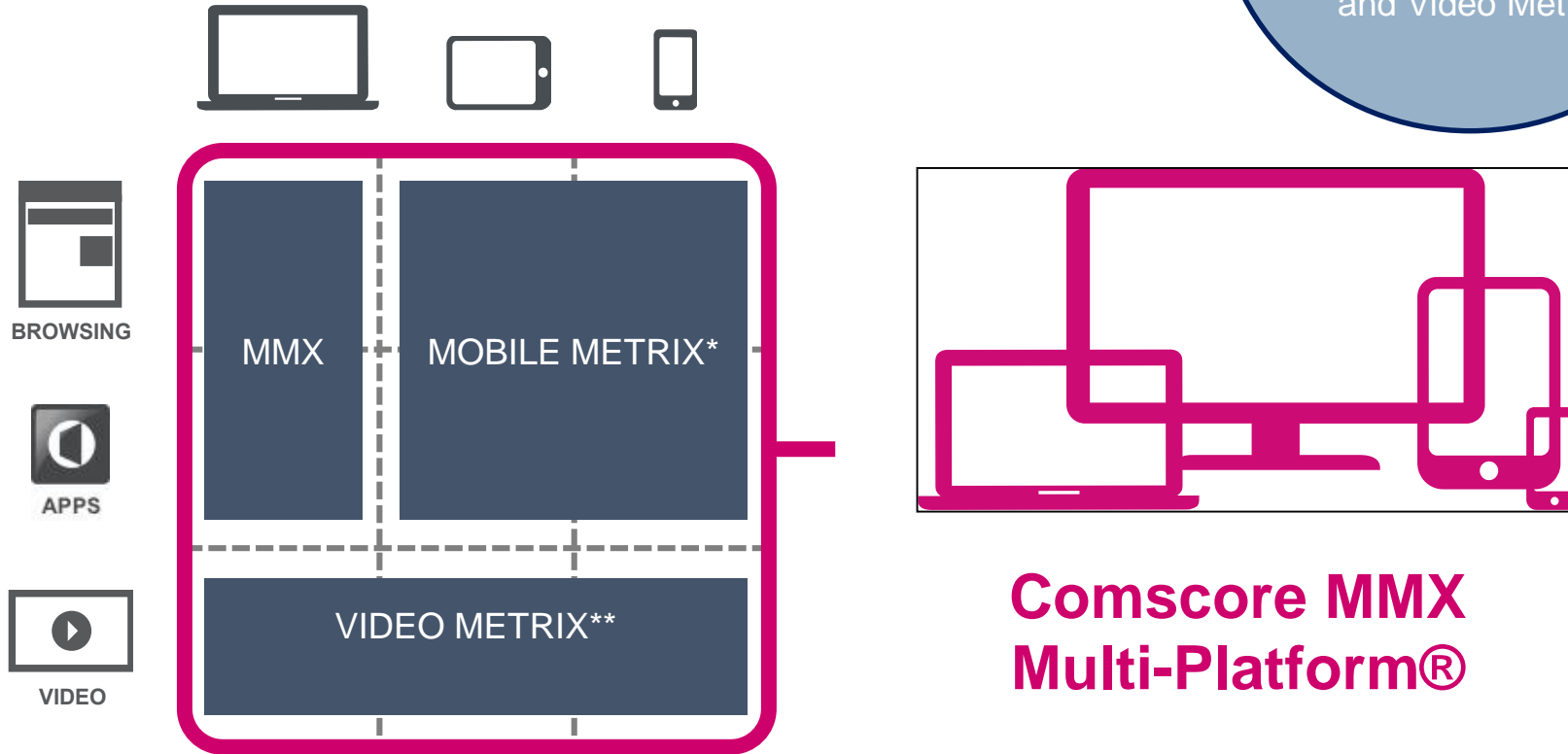
UK Digital Market Overview – December 2018



If you have any questions, please contact: insights@ukom.uk.net

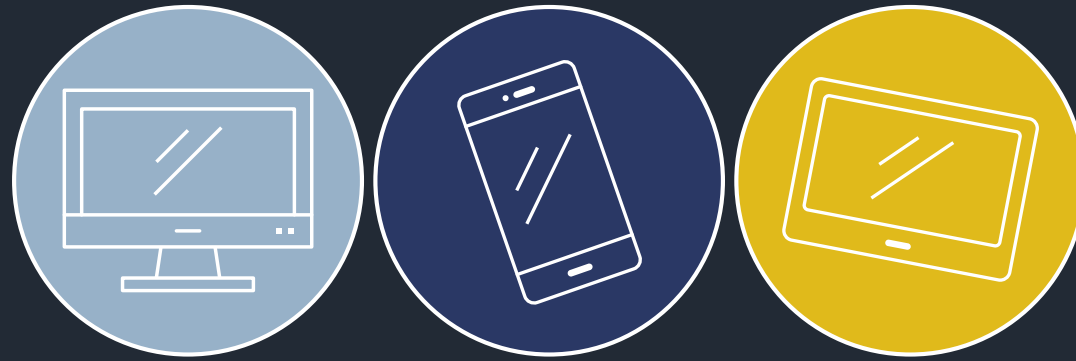
A Guide to Data Sources

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



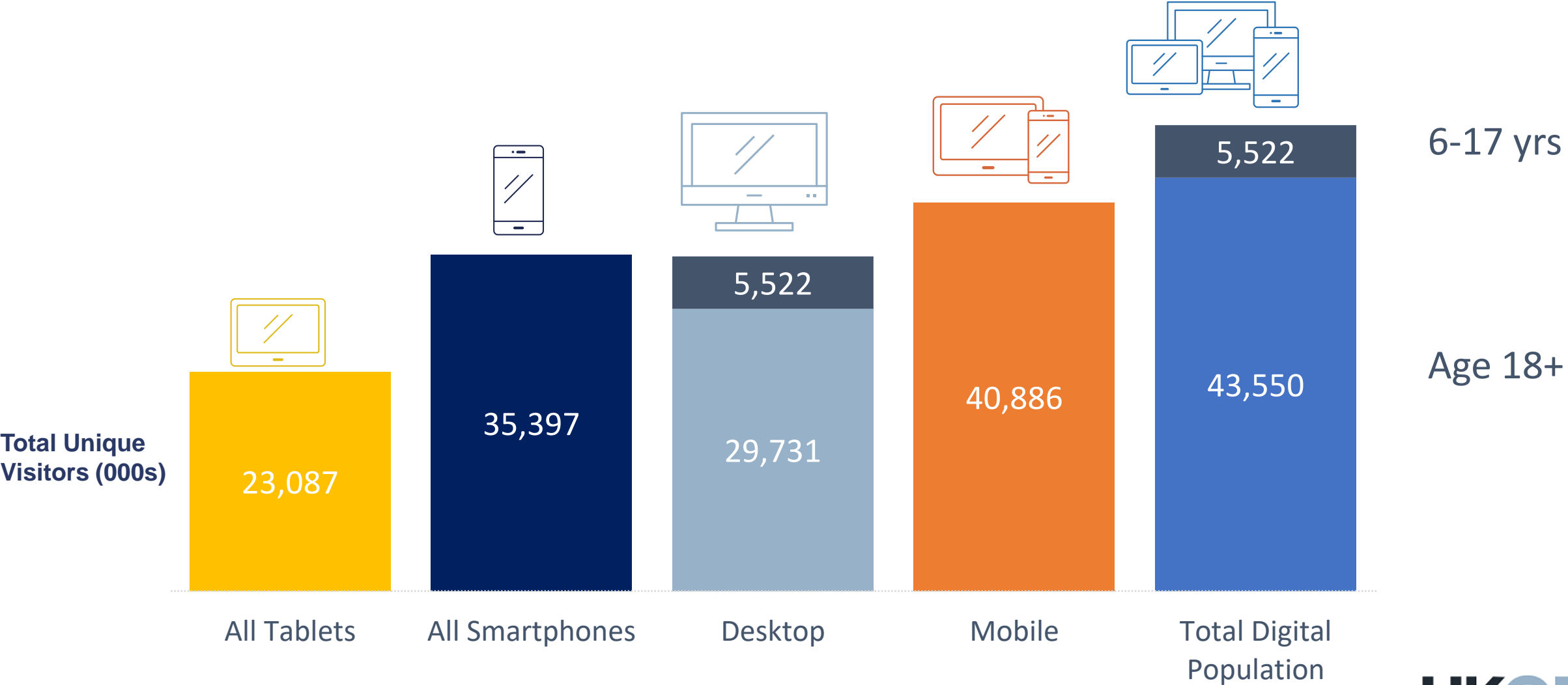
*Please note that we use the term mobile to refer to smartphone and tablet usage combined

**Video not yet included for mobile and tablet



Usage by Platform

Breakdown of Digital Unique Visitors by Platform

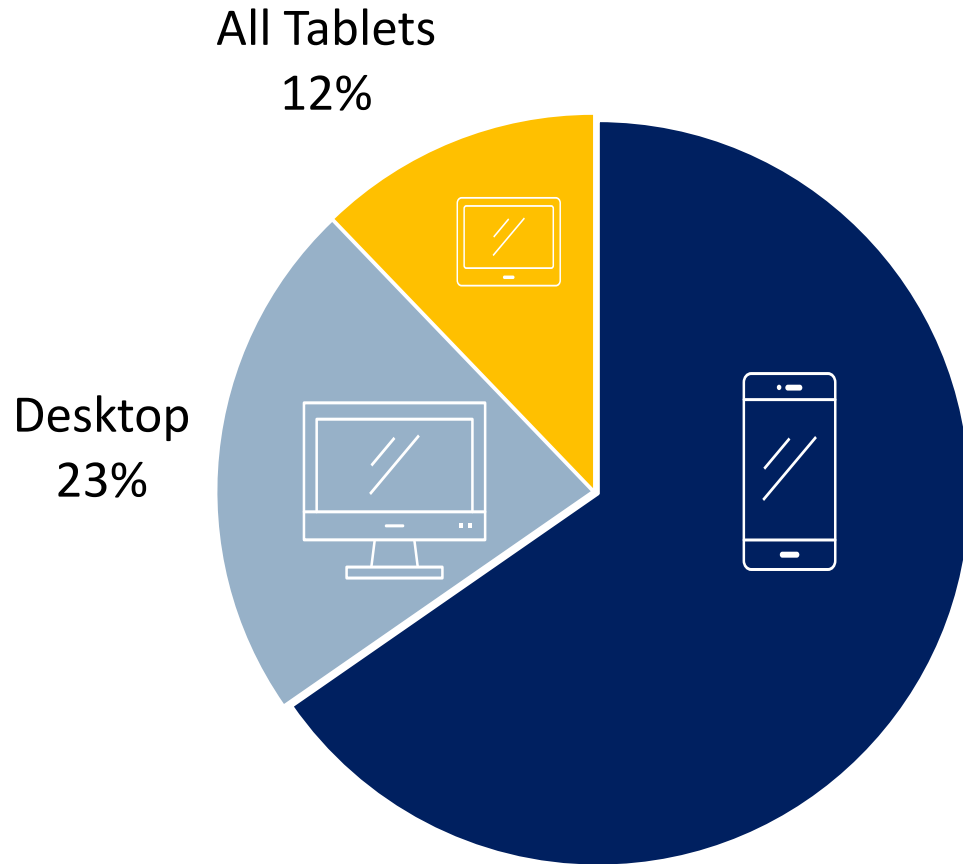


Total Unique Visitors (000s)

Share of Minutes by Platform

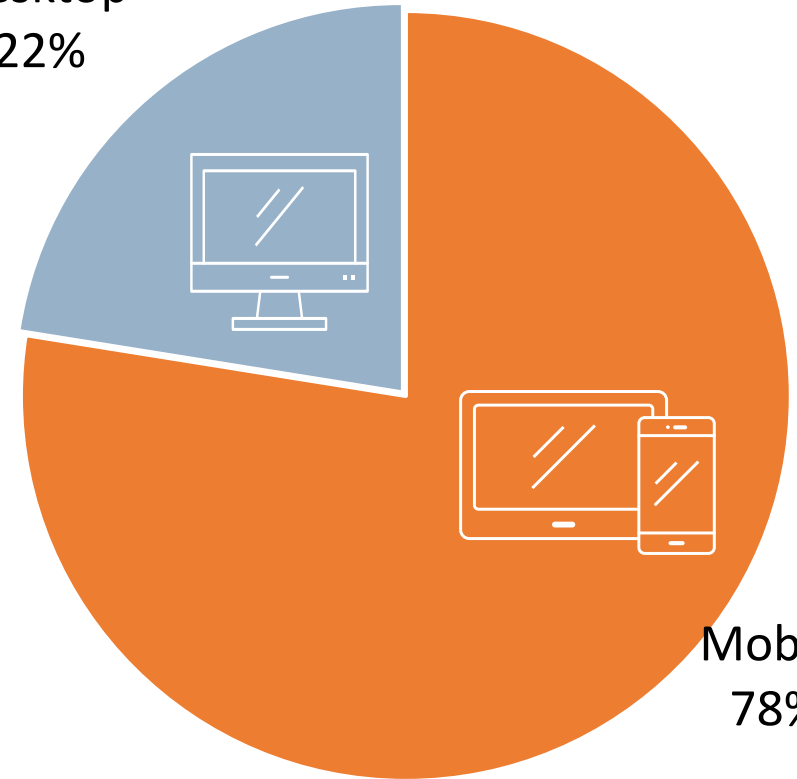
Mobile Devices now account for **78%** of all adult online minutes

Share of Total Minutes 18+



Desktop

22%



All
Smartphones
65%

Mobile
78%

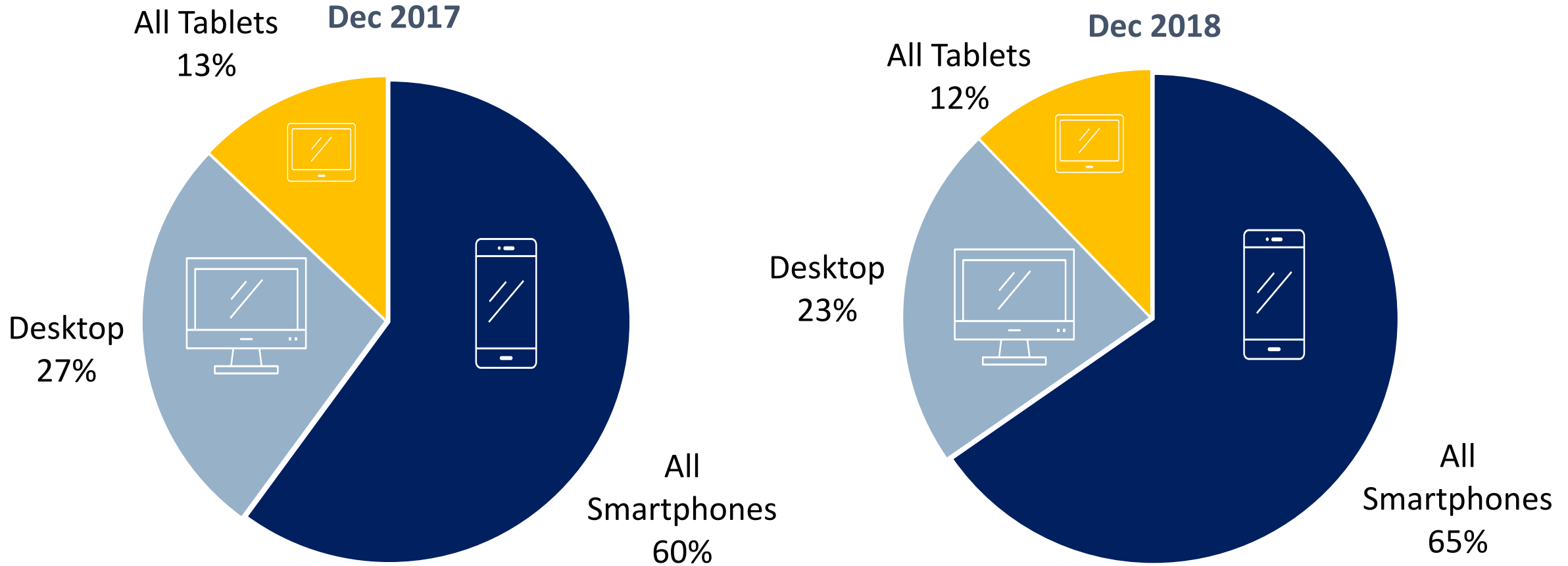
Source: Comscore MMX Multi-Platform, Dec 2018, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

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

Share of Minutes by Platform: Dec 18 v Dec 17

Smartphone's share of minutes has grown by 5% points over the last year

Share of Total Minutes 18+



Source: Comscore MMX Multi-Platform, Dec 2018, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

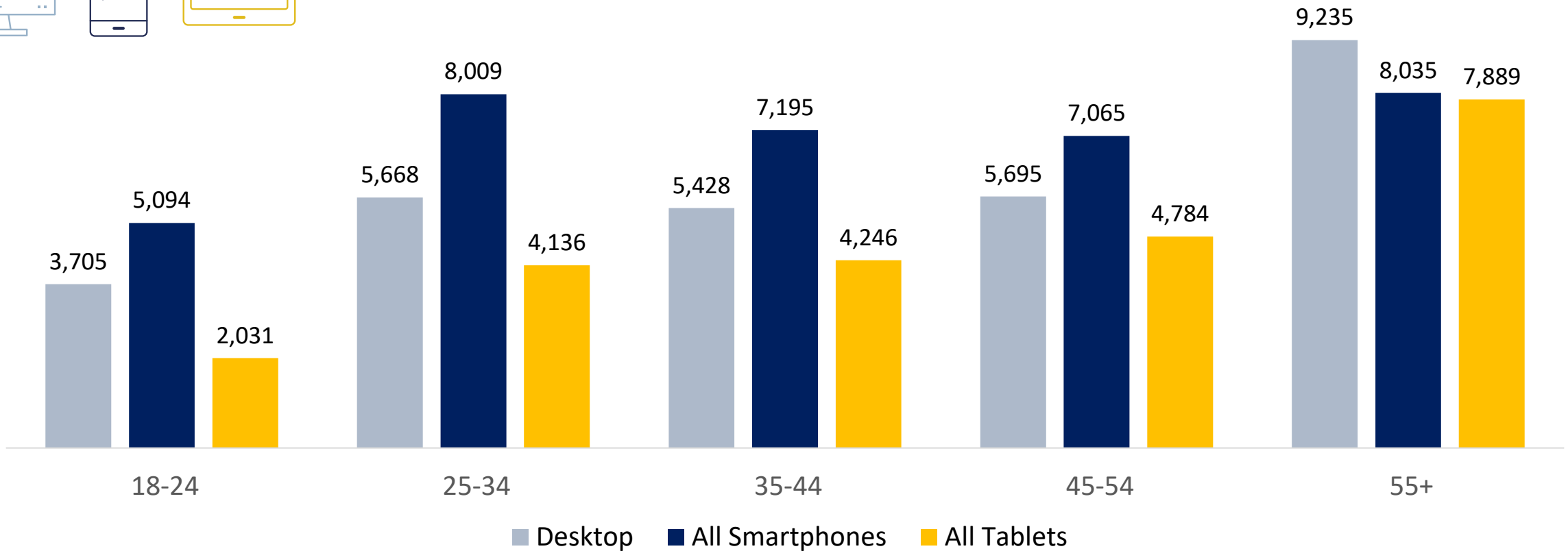
*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Platform Unique Visitors by Age

The Desktop has higher reach amongst Older Audiences

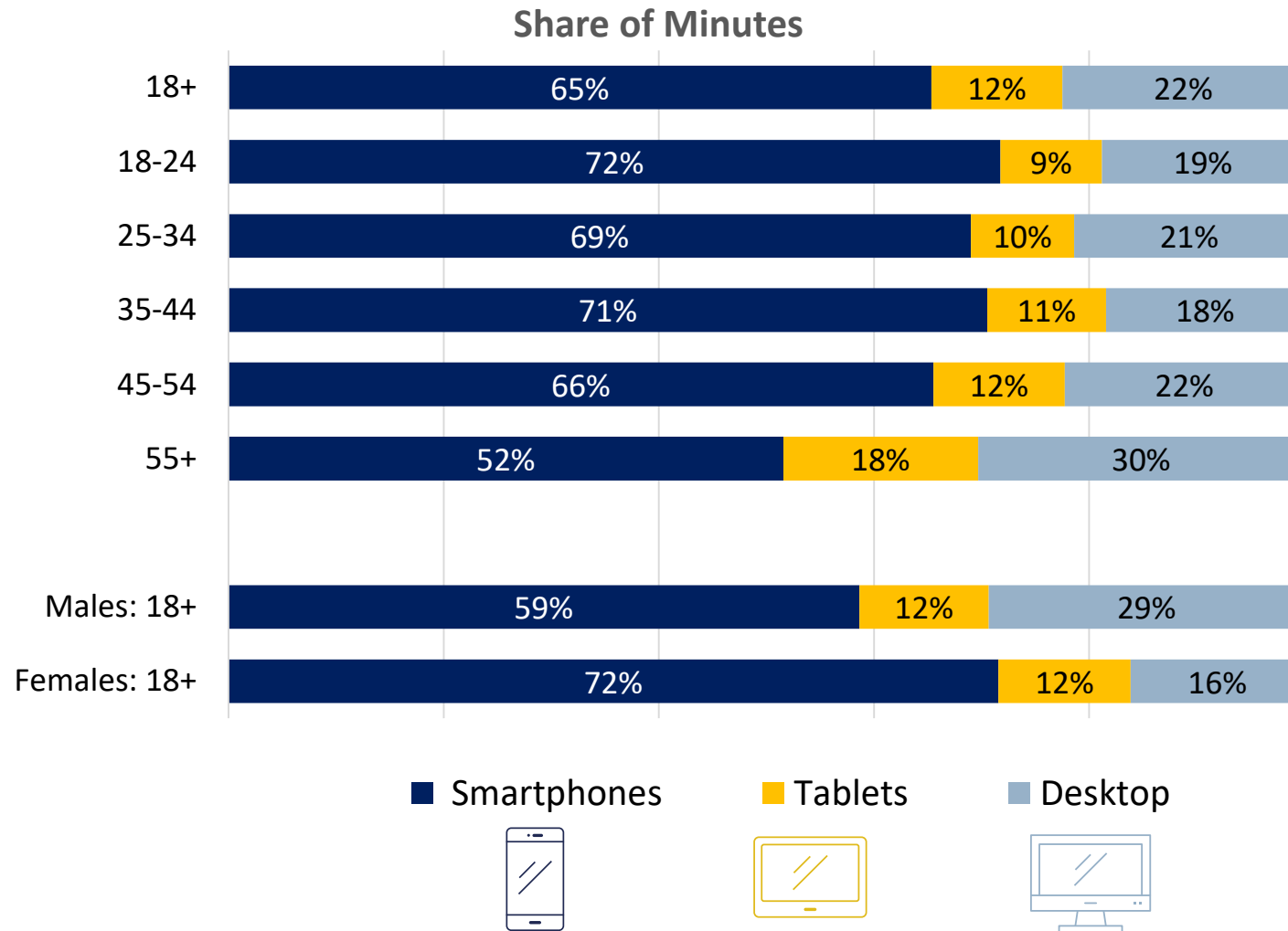


Audience by Platform by Age - Unique Visitors (000s)



Platform Share of Minutes by Age & Gender

Millennials & females spend greatest share of time on mobile devices

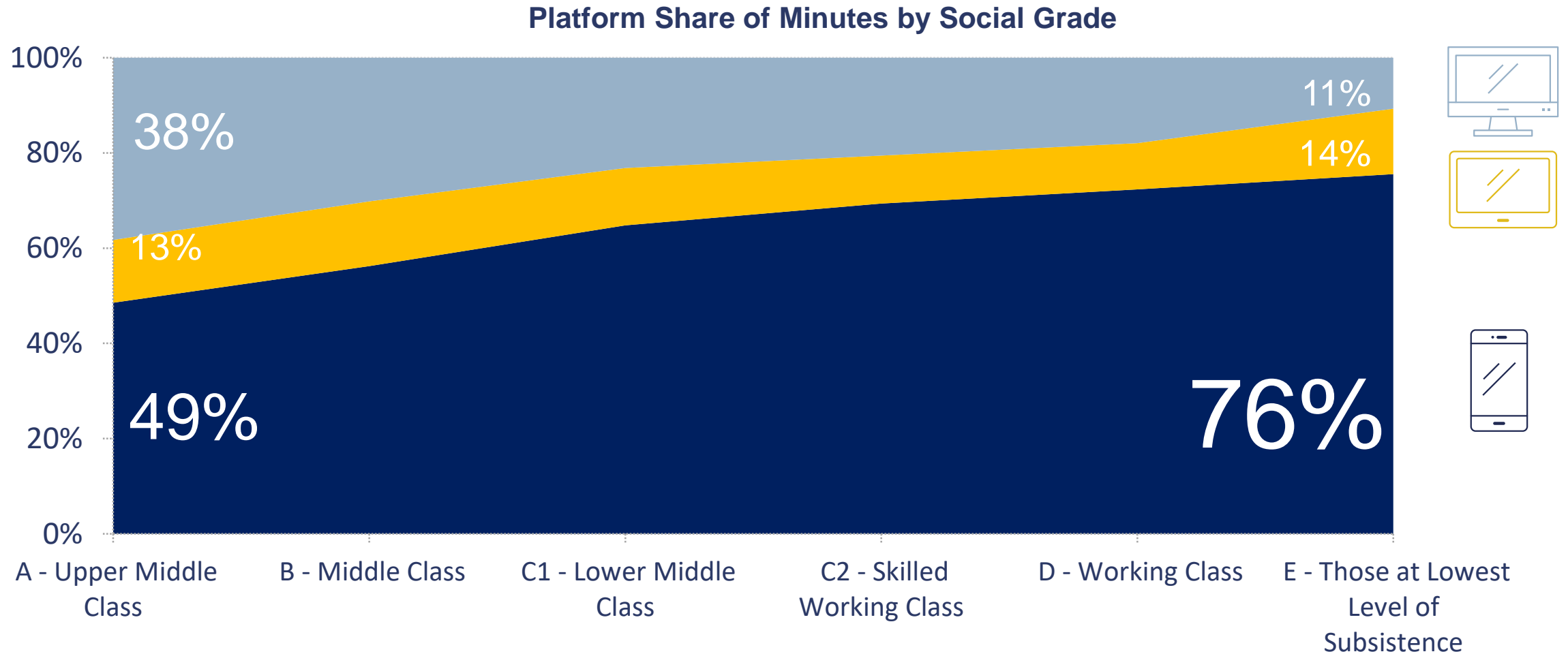


Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 84% of their time online on mobile devices compared to only 71% for males.

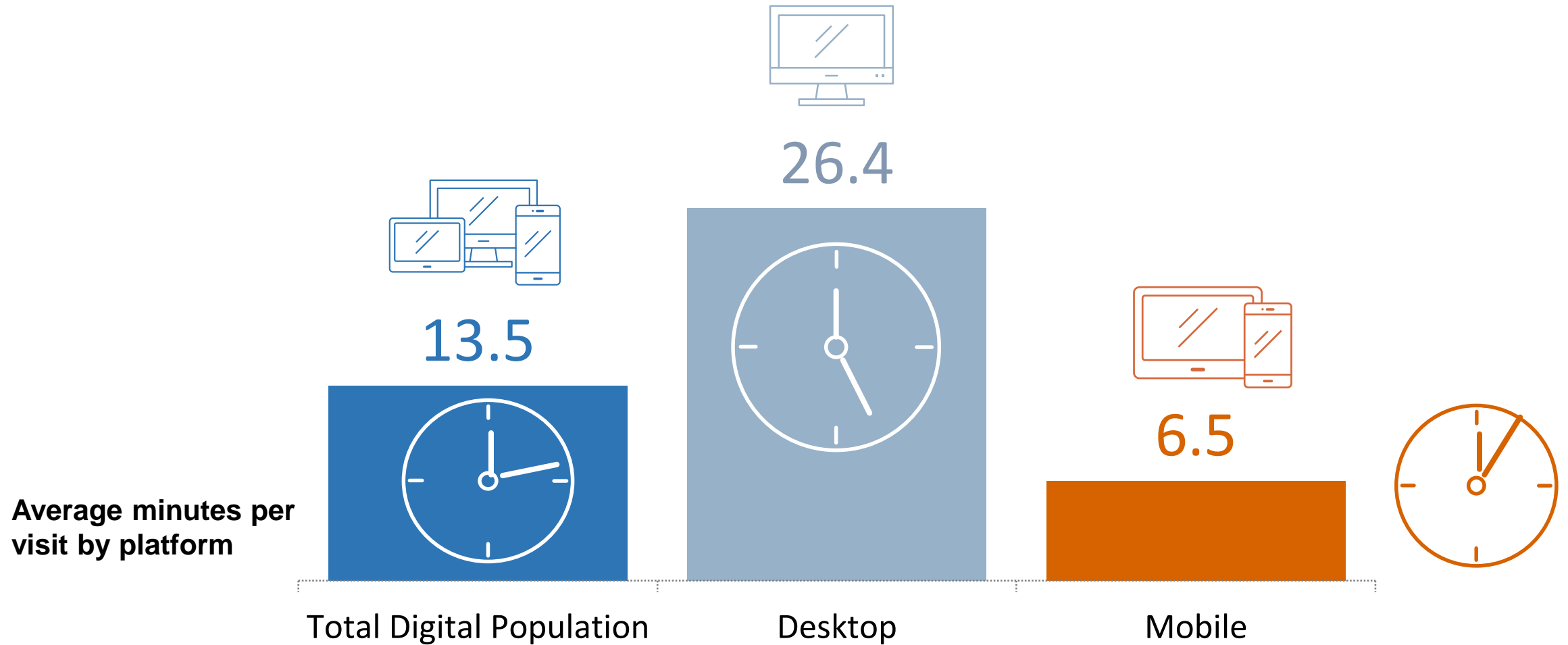
Platform Share of Time Online by Social Grade

Smartphone share increases with decreasing social grade



Average Minutes per Visit by Platform

Mobile visits are **shorter**



Average minutes per visit by platform

Total Digital Population

Desktop

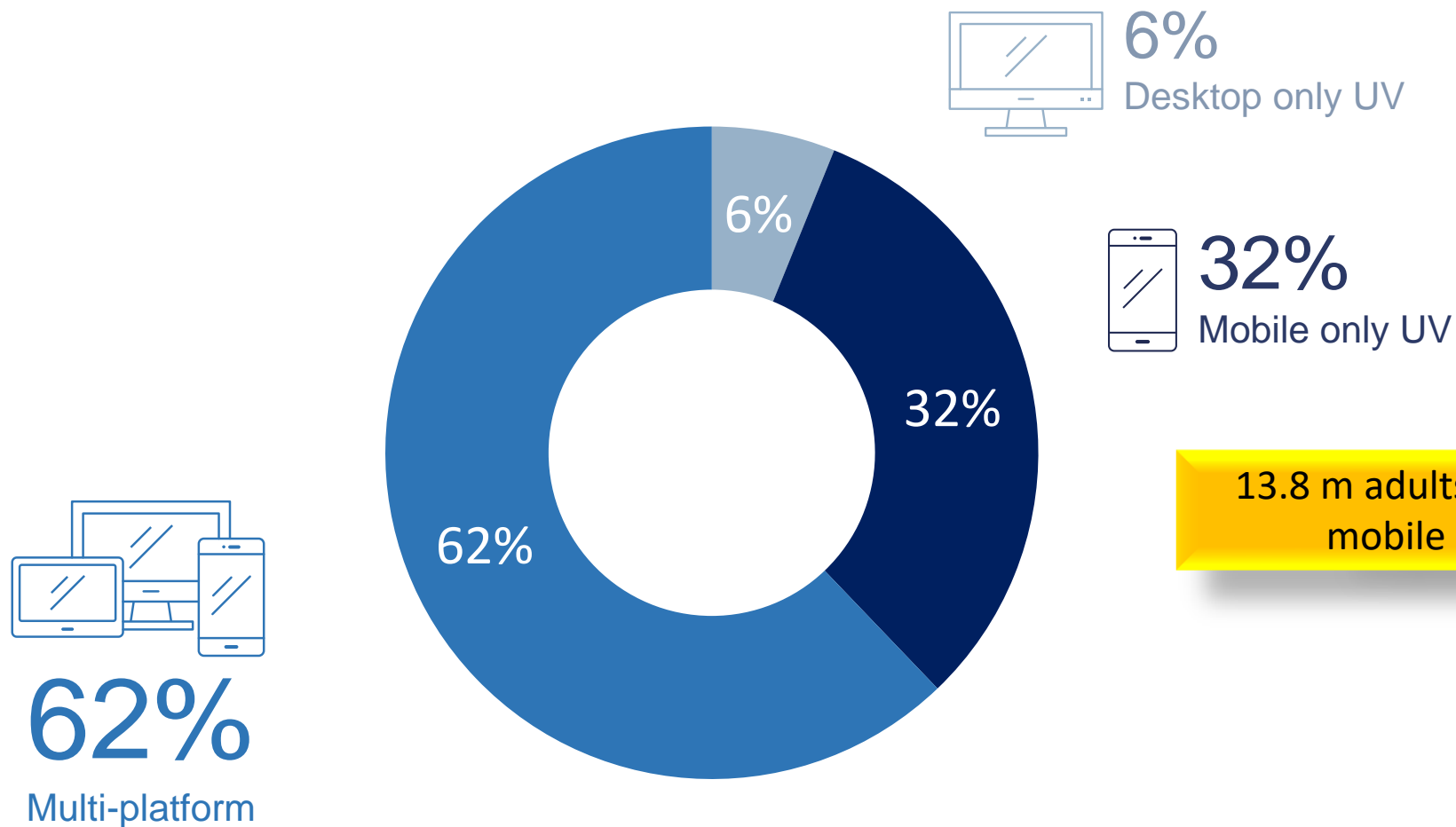
Mobile



Multi-Platform Usage

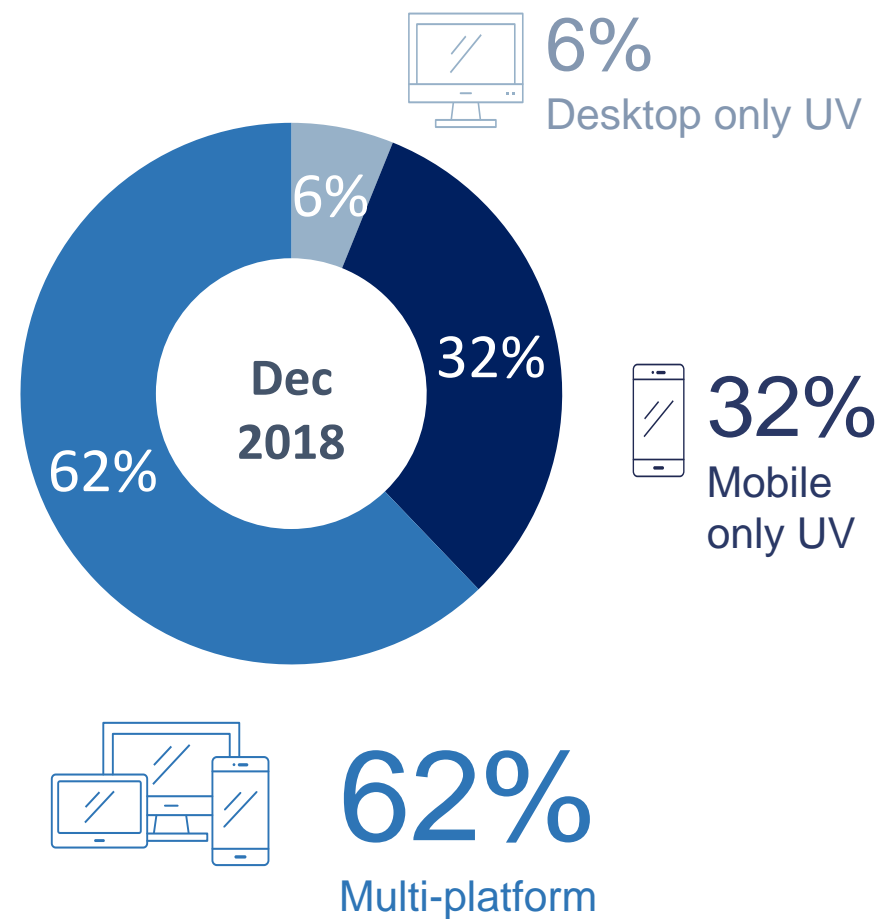
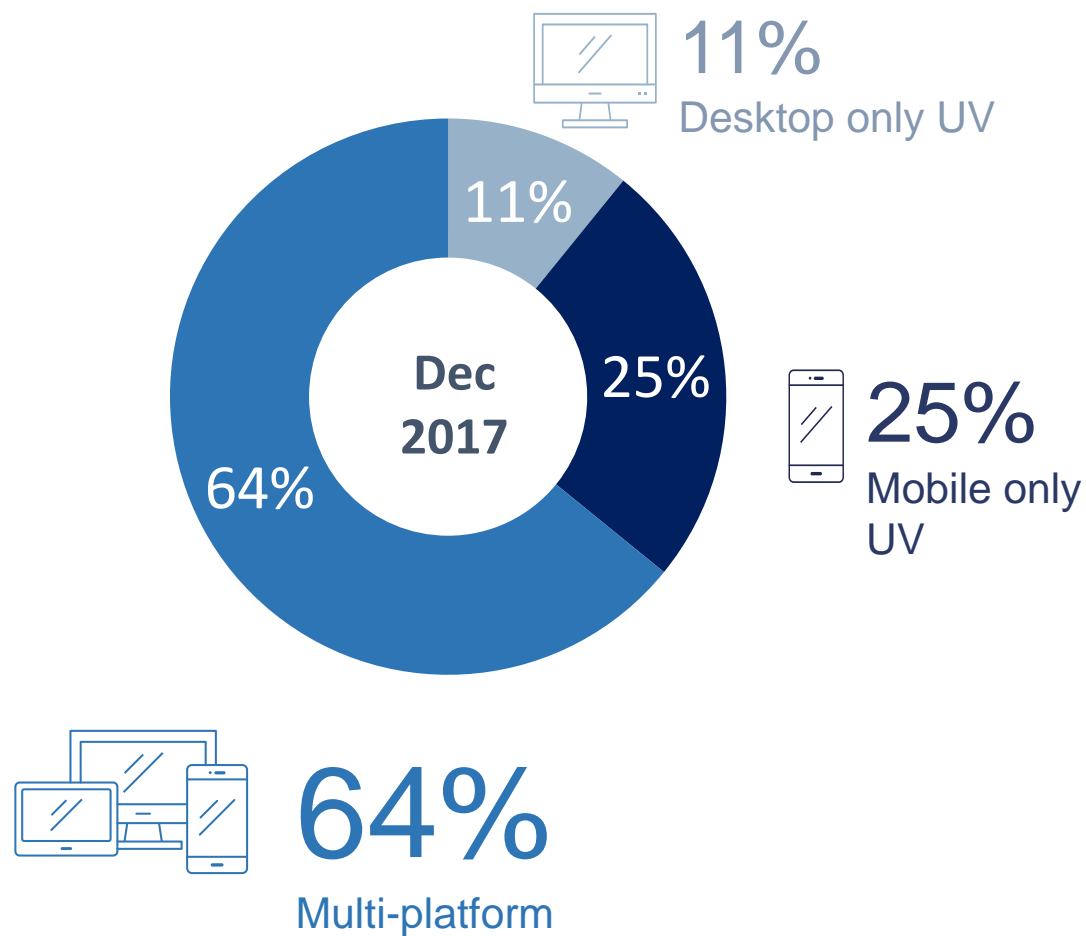
Multi-Platform Usage

Nearly a third of UK Adults are now Mobile Only



Multi-Platform Usage

The Mobile Only Audience has grown by 7% points since Dec 2017



comscore

Source: Comscore MMX Multi-Platform, Dec 2018, UK Adults 18+

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

UKOM

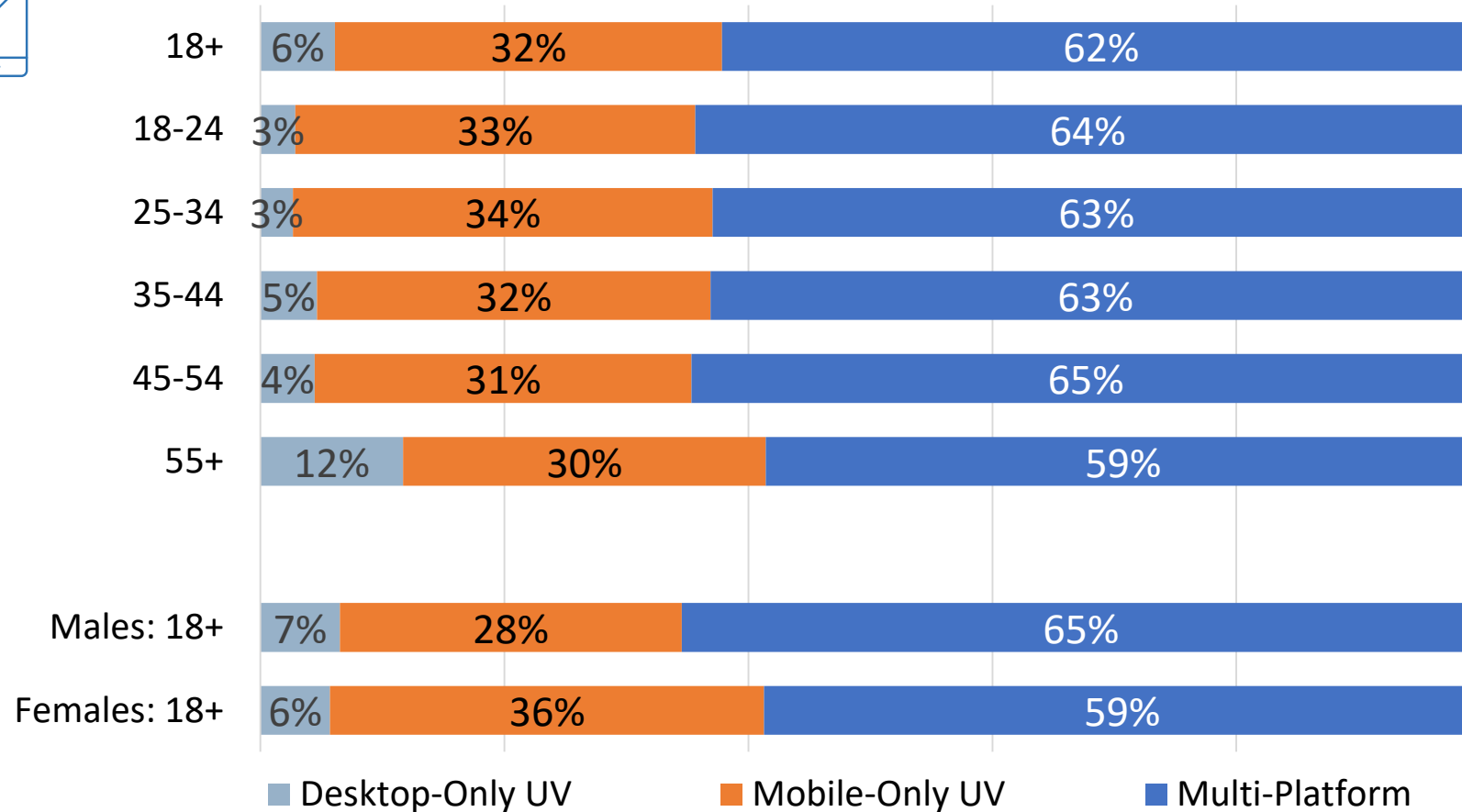
Setting the industry standard for
online audience measurement

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

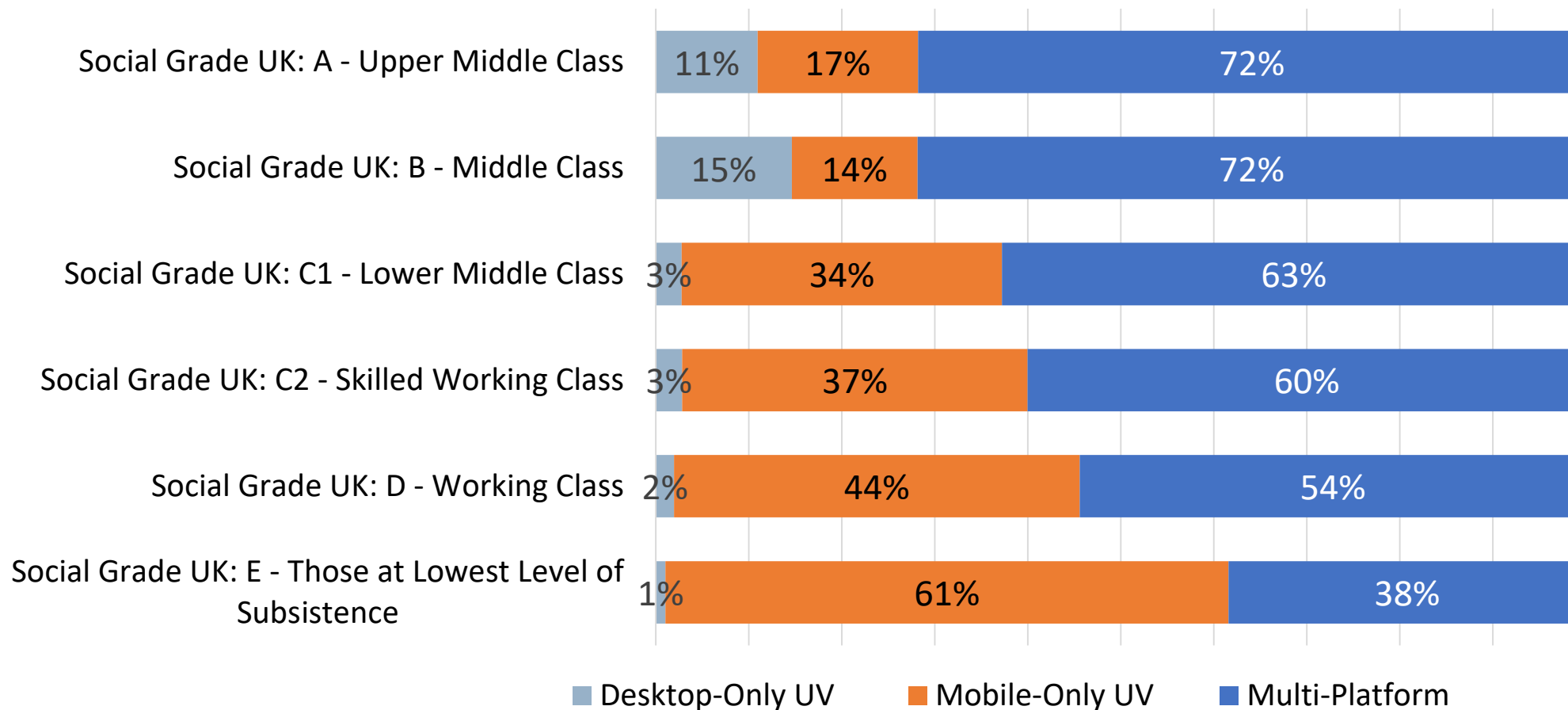
Females are more likely to be 'Mobile Only'

Multi-Platform usage by social grade

Lower social grades are least likely to be multi-platform



Unique Viewers by Platform by Age & Gender



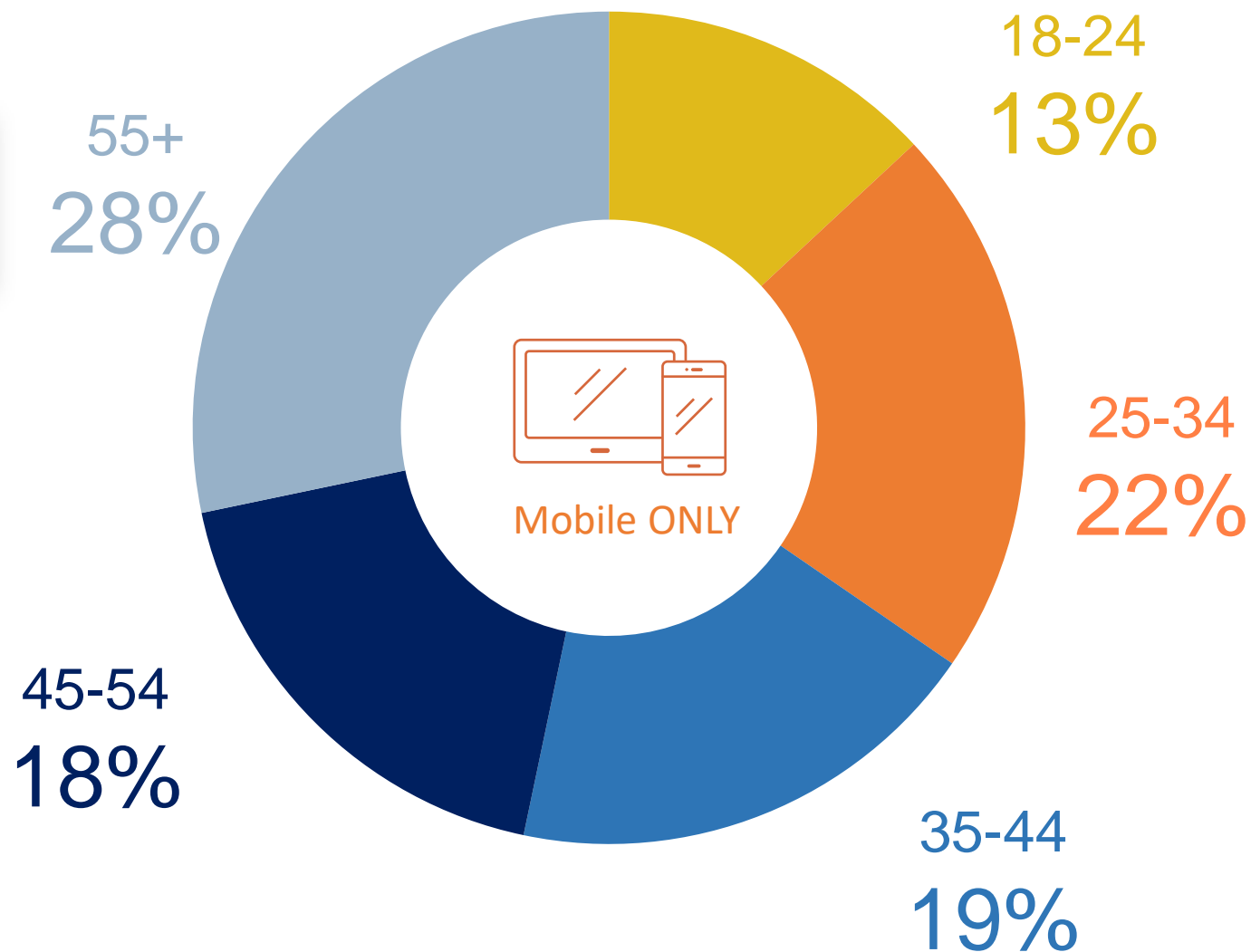
Source: Comscore MMX Multi-Platform, Dec 2018, UK Adults 18+

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

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, Dec 2018, UK Adults 18+

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



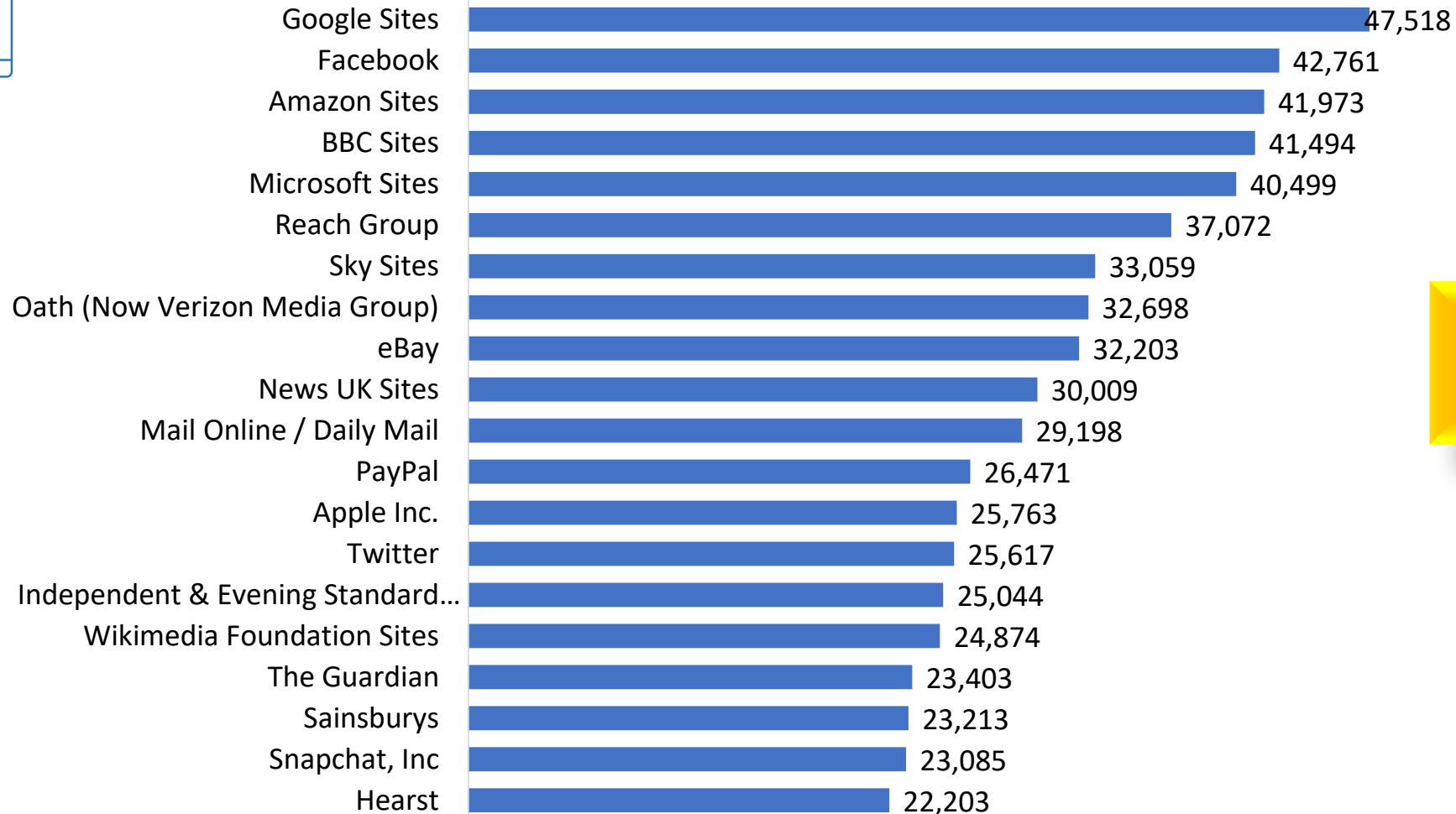
Top Properties: Total Digital Population

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

Google reaches 97% of the UK Online population



Total Unique Visitors/Viewers (000s) = 49,072



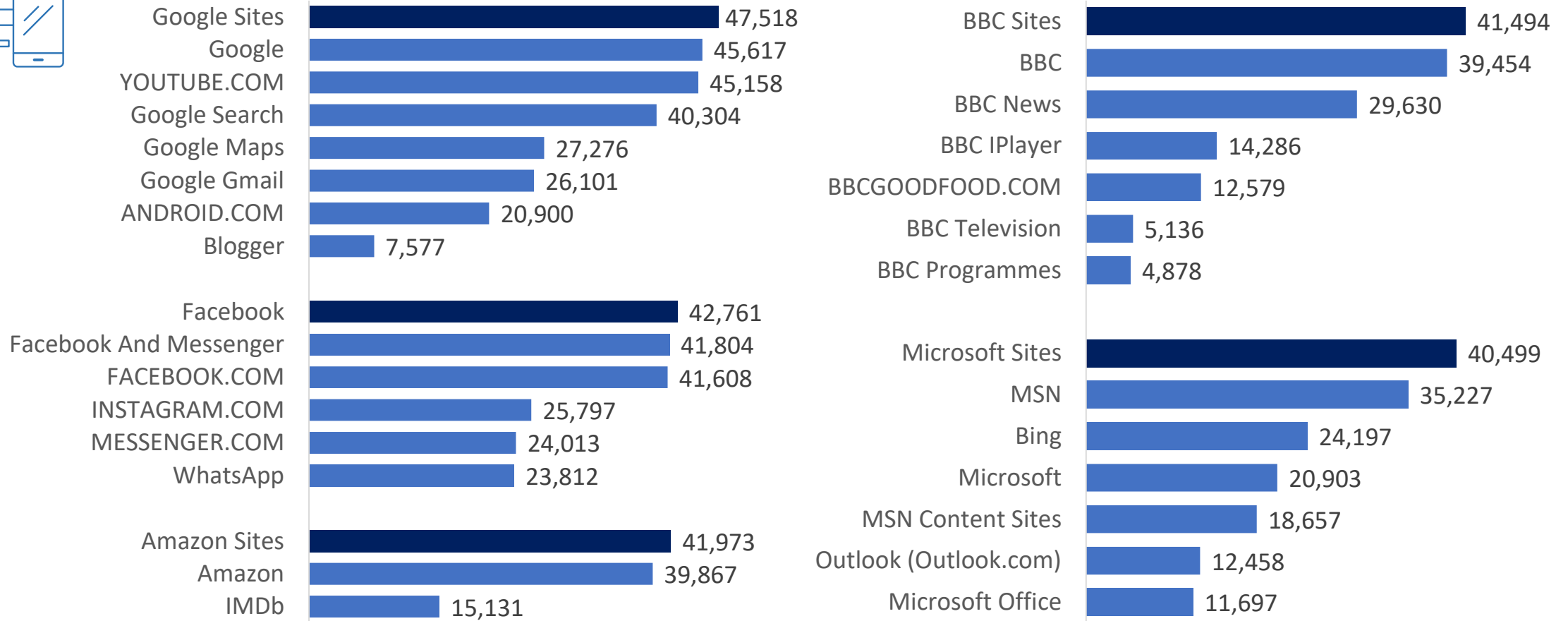
The top 5 properties
all have online reach
over 80%

Audience Breakdown of Top 5 Sites

YouTube alone reaches more than all Facebook properties combined



Total Unique Visitors (000)

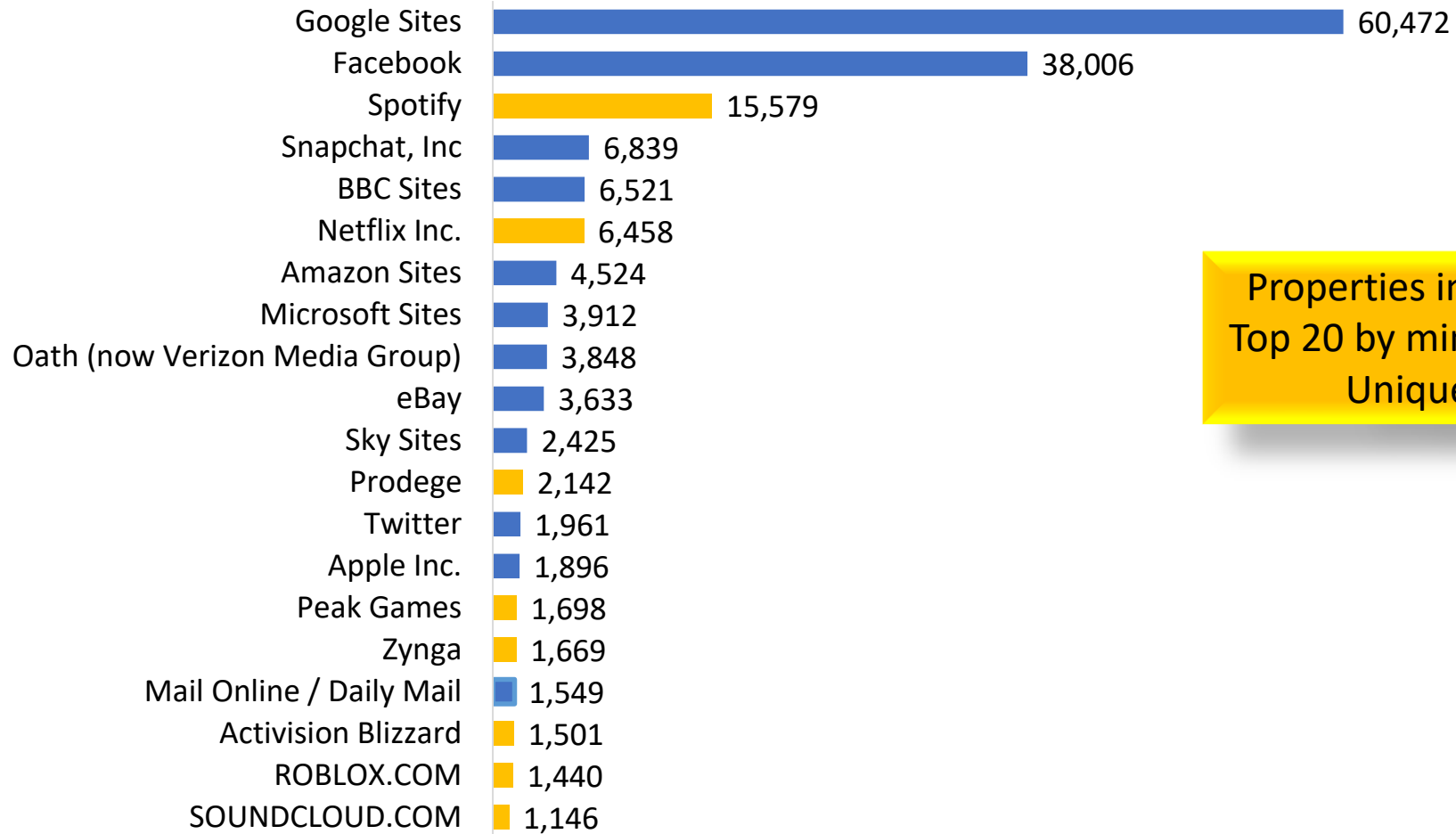


Top 20 Properties by 'Time Spent*' – Total Digital Population

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



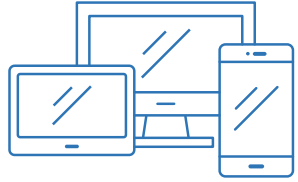
Total Mins (MM) – Total Market = 262,680



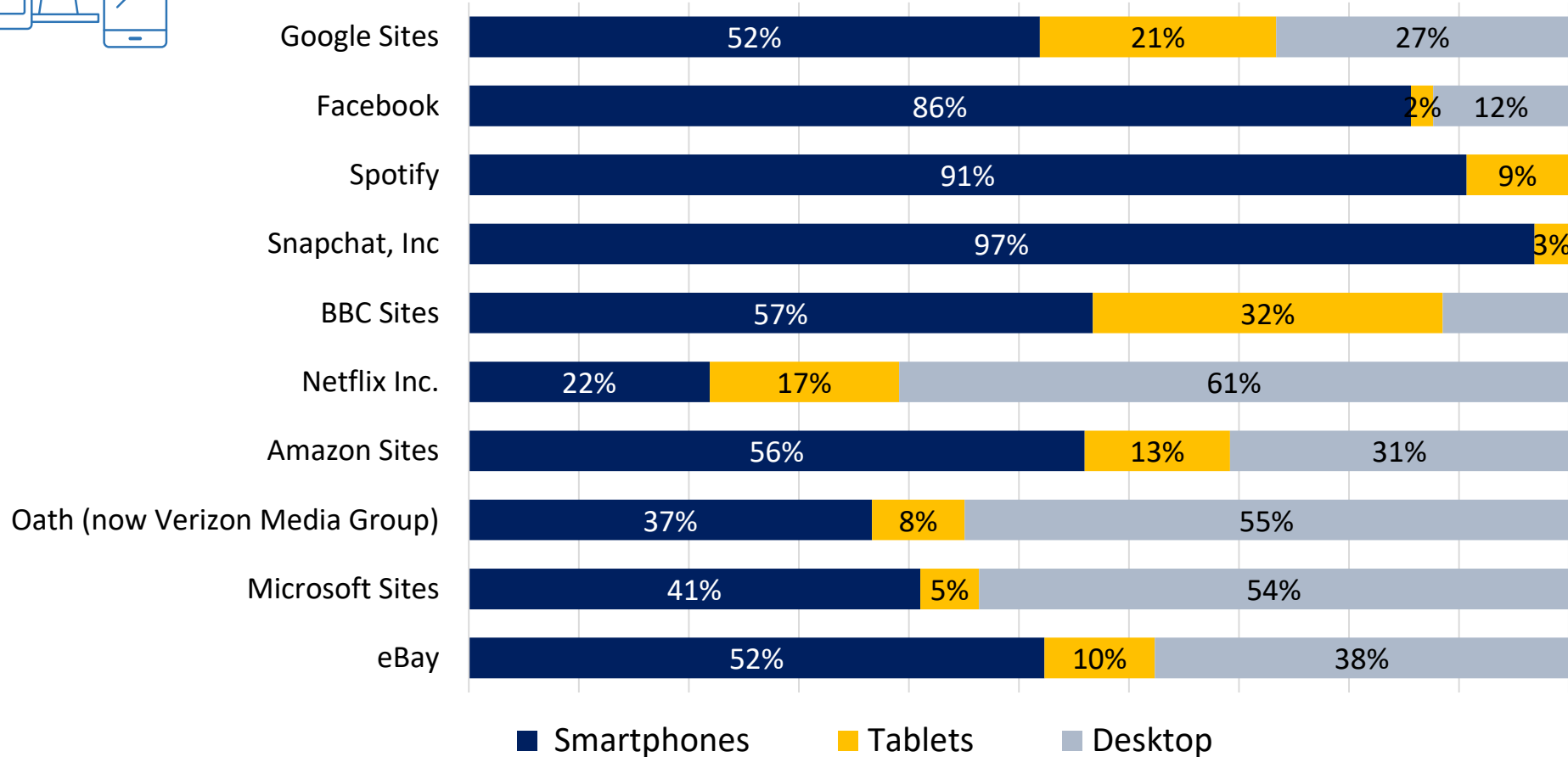
Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

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



Share Of Minutes



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

BBC, Google & Netflix have highest Tablet share out of top 10

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



Mobile usage

Mobile Reach by Platform & Access

86% of the UK online adult population use mobile apps

Reach of Online UK Population - Dec 2018, 18+



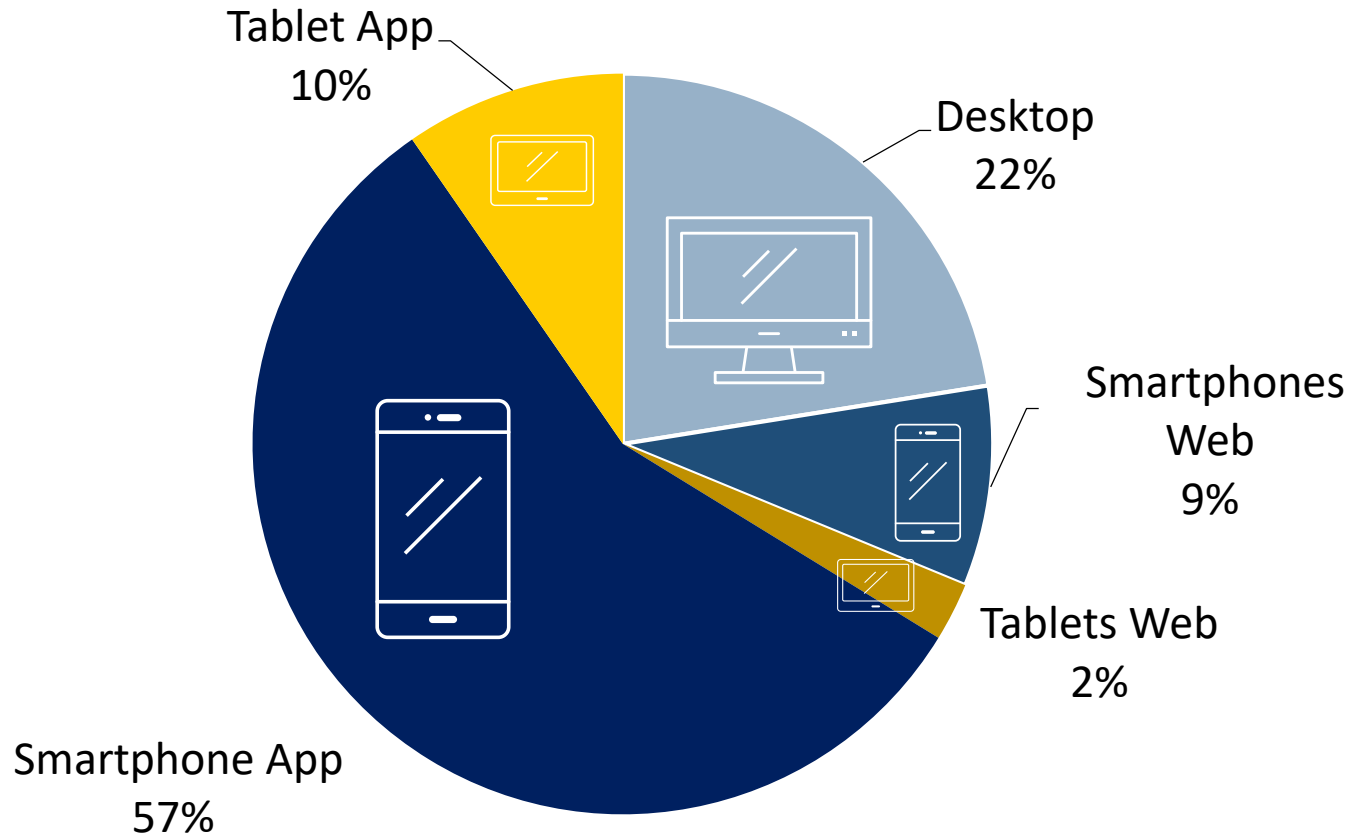
Source: Comscore MMX Multi-Platform, Dec 2018, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

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

Share of Minutes by Platform & Mobile Access

Mobile Apps account for 66% of all Minutes

Share of Total Minutes



Mobile Apps account for **66%** of ALL minutes & **85%** of MOBILE minutes

Source: Comscore MMX Multi-Platform, Dec 2018, 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



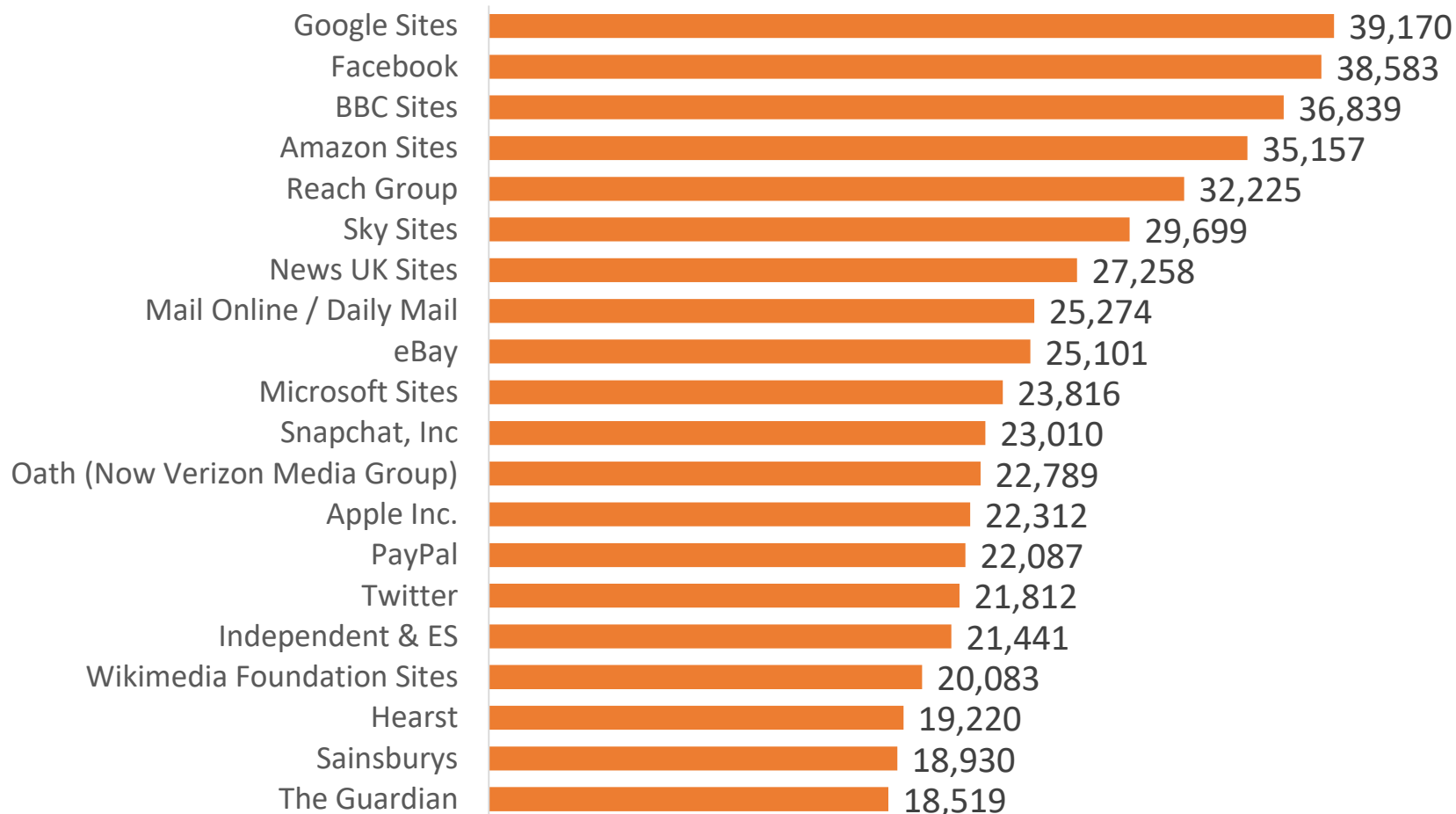
Top Properties: Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

40m adults accessed mobile content in Dec 2018 (via browser and app)



Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 40,886

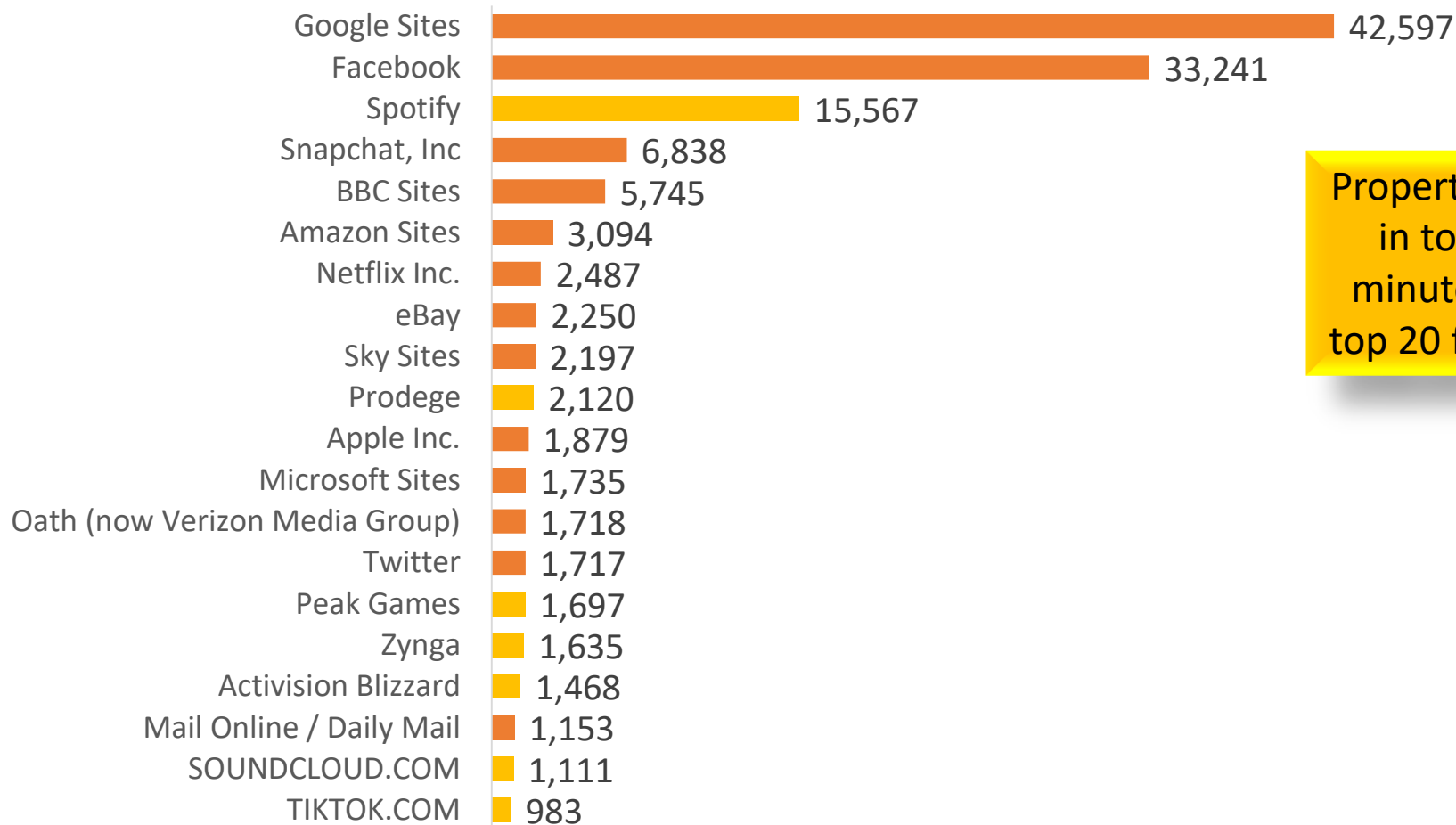


Top 20 Mobile Properties ranked by minutes

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



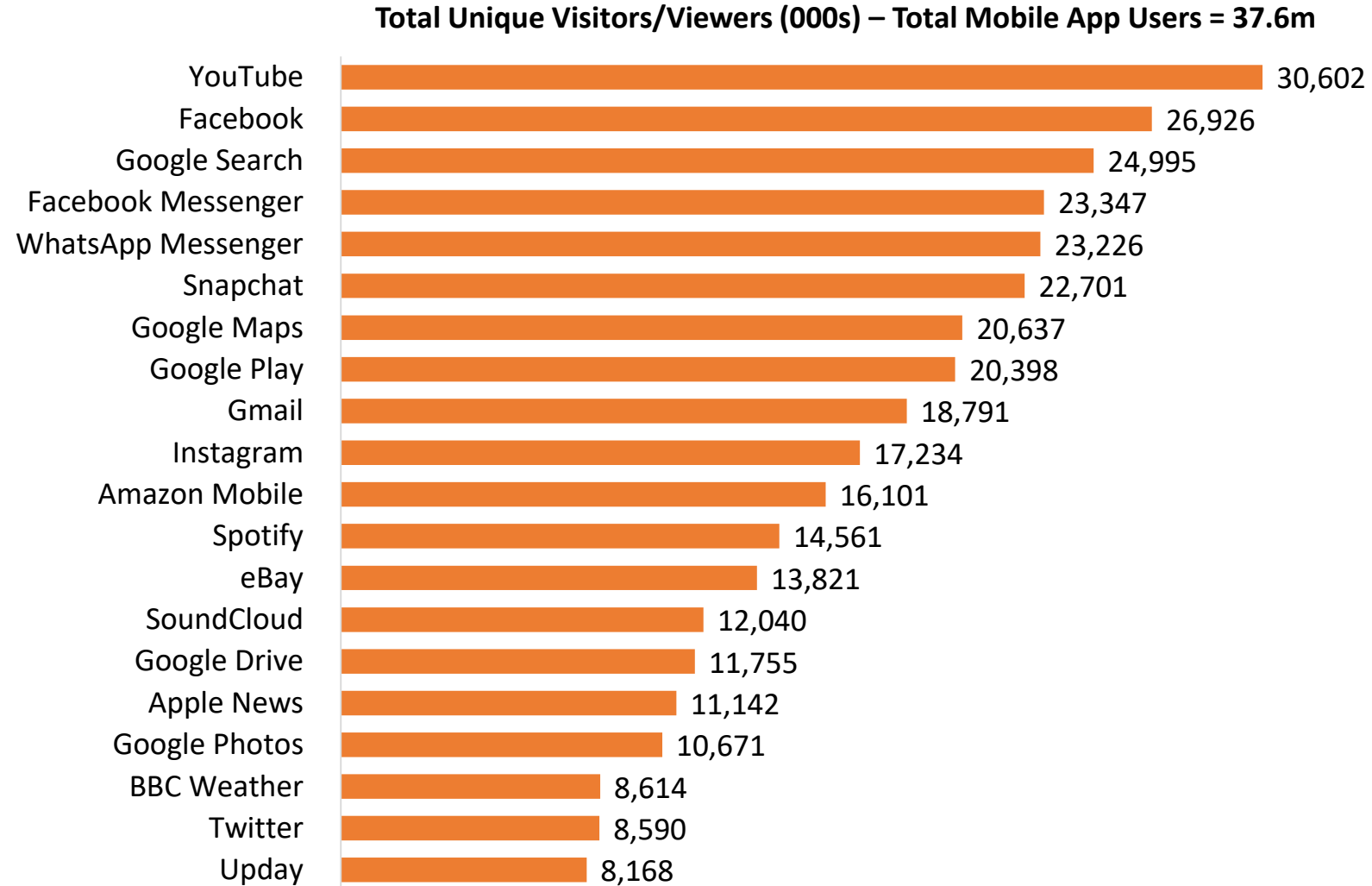
Total Minutes (MM) Total Mobile (18+) = 200,283



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

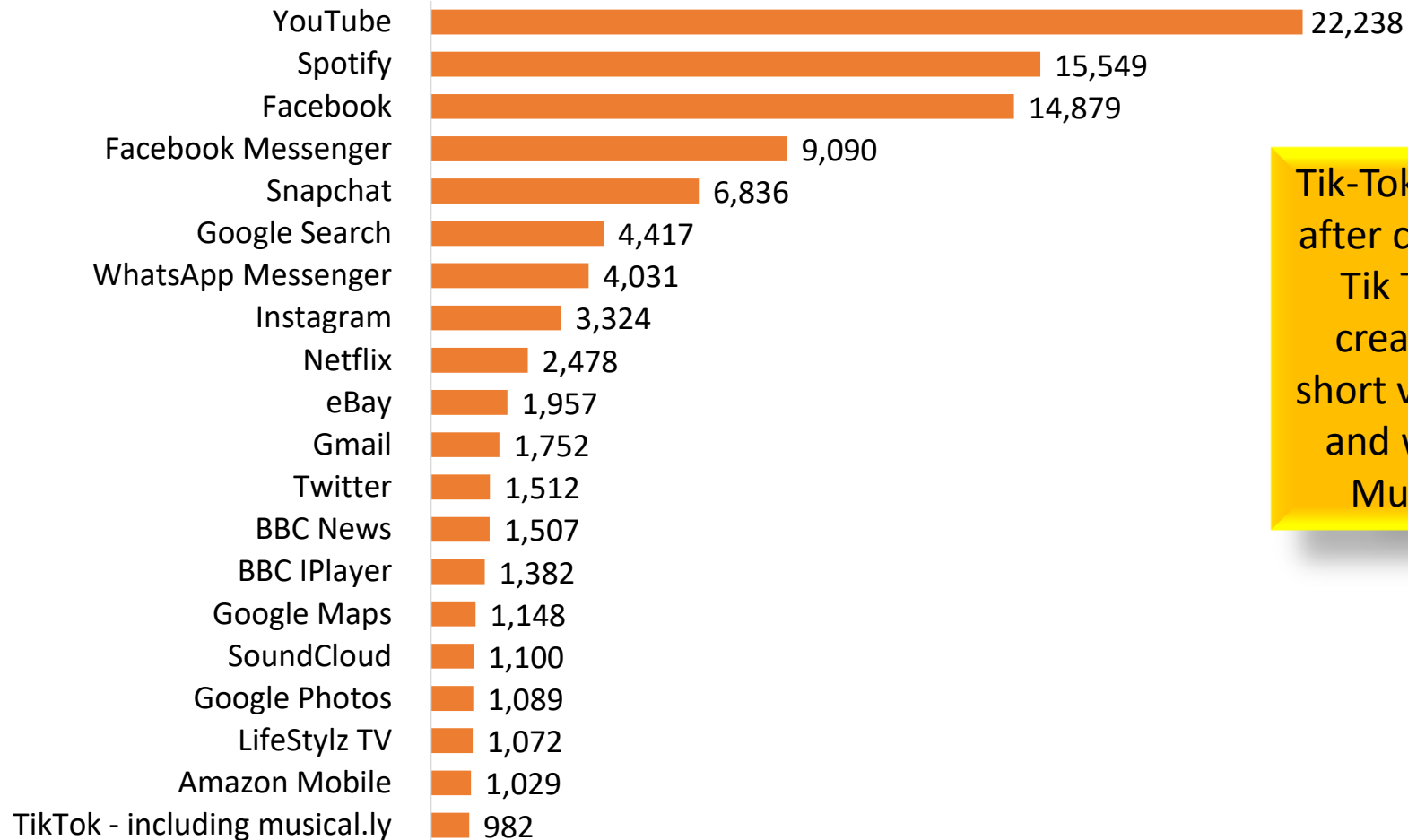


Top 20 Mobile (Tablet & Smartphone) Apps ranked by Minutes

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



Total Mins (MM) – Total Market = 171,101

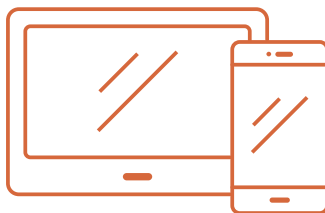


Tik-Tok enters the top 20 after continued growth - Tik Tok is an app for creating and sharing short videos set to music and was merged with Musical.ly in 2017.

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 | 30.6 |
| Facebook | 26.9 |
| Google Search | 25.0 |
| Facebook Messenger | 23.3 |
| WhatsApp Messenger | 23.2 |
| Snapchat | 22.7 |
| Google Maps | 20.6 |
| Google Play | 20.4 |
| Gmail | 18.8 |
| Instagram | 17.2 |

Smartphone Top 10



| | (Million) |
|----------------------|-----------|
| • YouTube | 26.5 |
| • Facebook | 24.2 |
| • WhatsApp Messenger | 23.0 |
| • Google Search | 23.0 |
| • Facebook Messenger | 22.0 |
| • Google Play | 20.4 |
| • Google Maps | 19.5 |
| • Gmail | 17.7 |
| • Snapchat | 16.9 |
| • Instagram | 15.3 |

Tablet Top 10

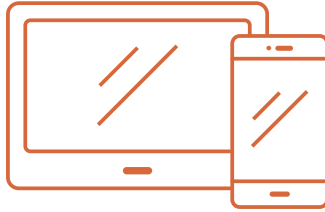


| | (Million) |
|-----------------|-----------|
| • Snapchat | 7.7 |
| • YouTube | 6.2 |
| • Facebook | 3.9 |
| • BBC IPlayer | 3.7 |
| • Google Search | 2.8 |
| • Instagram | 2.6 |
| • BBC Weather | 2.3 |
| • Netflix | 2.3 |
| • Spotify | 2.3 |
| • Apple News | 2.2 |

Top 10 Mobile Apps by Minutes by Mobile Platform

Spotify, Netflix & Ebay enter the top 10 for Minutes

Total Mobile Top 10



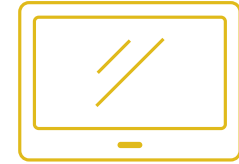
| | (Million) |
|--------------------|-----------|
| YouTube | 22.2 |
| Spotify | 15.5 |
| Facebook | 14.9 |
| Facebook Messenger | 9.1 |
| Snapchat | 6.8 |
| Google Search | 4.4 |
| WhatsApp Messenger | 4.0 |
| Instagram | 3.3 |
| Netflix | 2.5 |
| eBay | 2.0 |

Smartphone Top 10



| | (Million) |
|--------------------|-----------|
| Facebook | 14.4 |
| Spotify | 14.1 |
| YouTube | 14.1 |
| Facebook Messenger | 9.1 |
| Snapchat | 6.6 |
| WhatsApp Messenger | 4.0 |
| Instagram | 3.3 |
| Google Search | 3.2 |
| eBay | 1.7 |
| Gmail | 1.5 |

Tablet Top 10



| | (Million) |
|---------------|-----------|
| YouTube | 8.2 |
| Spotify | 1.4 |
| Google Search | 1.2 |
| Netflix | 1.1 |
| BBC IPlayer | 0.8 |
| Facebook | 0.5 |
| BBC News | 0.4 |
| eBay | 0.3 |
| YouTube Kids | 0.3 |
| ITV Hub | 0.3 |



Categories

Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

22%

| | |
|-------------------------|-----|
| Education | 80% |
| Entertainment - Movies | 73% |
| Kids | 71% |
| Family & Youth | 64% |
| Media | 61% |
| Information/Resources | 58% |
| Automotive | 54% |
| Gaming Information | 50% |
| e-mail | 42% |
| Real Estate | 40% |
| Apparel | 40% |
| Department Stores/Malls | 38% |
| Reference | 37% |
| Banking | 35% |
| Entertainment - News | 35% |



Smartphone total

65%

| | |
|-----------------------------------|-----|
| • Instant Messengers | 99% |
| • Coupons/Incentives | 91% |
| • Maps/GPS/Traffic | 91% |
| • Diet & Exercise/Fitness Tracker | 89% |
| • Books | 89% |
| • Consumer Electronics | 89% |
| • Health | 88% |
| • Social Media | 88% |
| • Payments | 87% |
| • Dating | 86% |
| • Entertainment - Music | 86% |
| • Social Networking | 84% |
| • Technology | 79% |
| • Online Gaming | 77% |
| • Lifestyles | 76% |



Tablet total

12%

| | |
|-------------------------|-----|
| General News | 25% |
| Entertainment | 23% |
| News/Information | 21% |
| Multi-Category | 20% |
| Games | 16% |
| Real Estate | 16% |
| Entertainment - News | 15% |
| Sports | 14% |
| Local News | 14% |
| Department Stores/Malls | 13% |
| Tickets | 13% |
| Jewellery/Luxury goods | 13% |
| Politics | 12% |
| Home Furnishings | 12% |
| Services | 12% |

Source: Comscore MMX Multi-Platform, Dec 2018, UK, Adults 18+

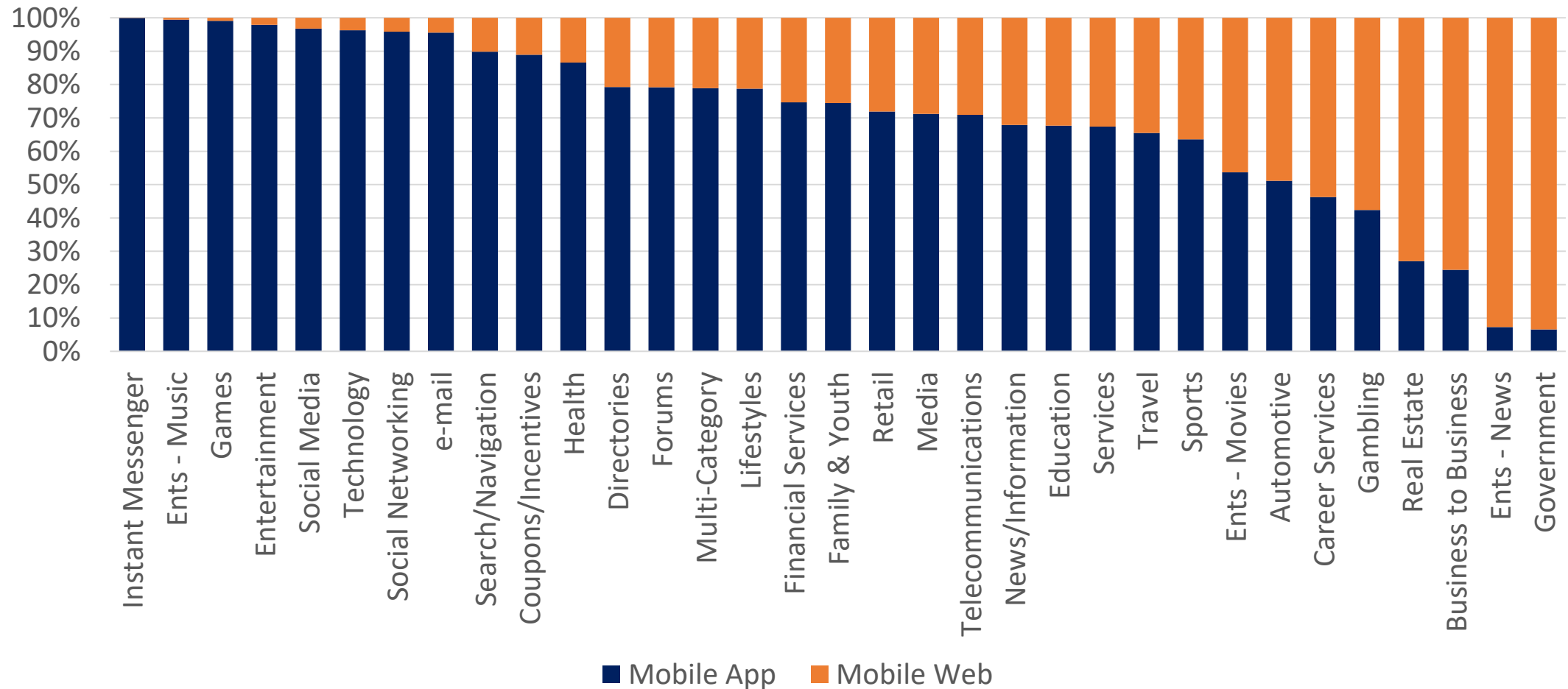
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

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





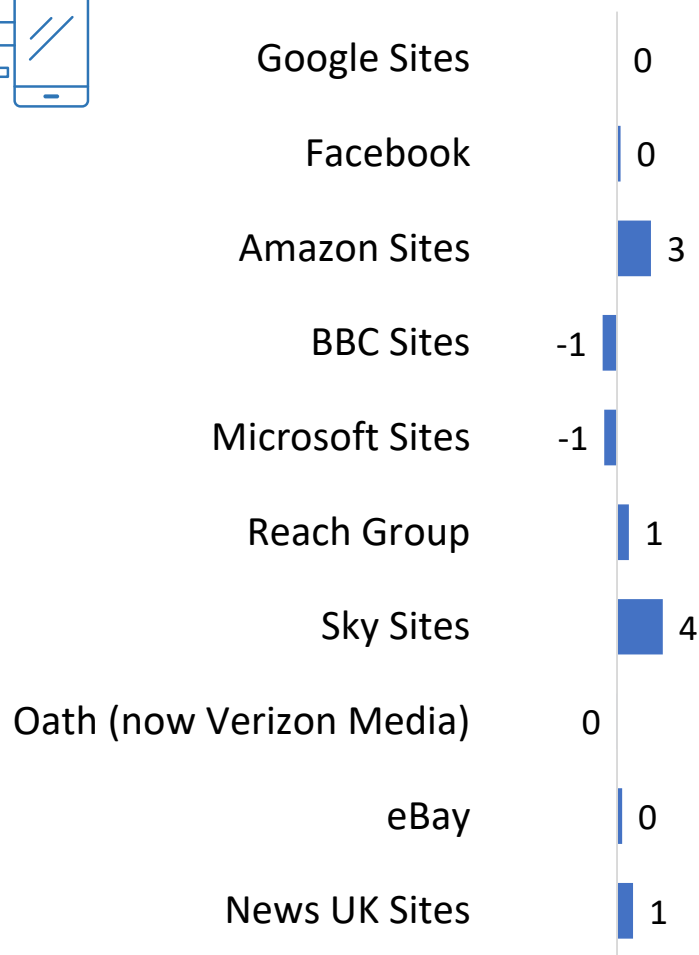
Key Changes: Dec 18 v Sep 18

% Change for Top Unique Visitor and Time Spent Properties: Dec 18 v Sep 18

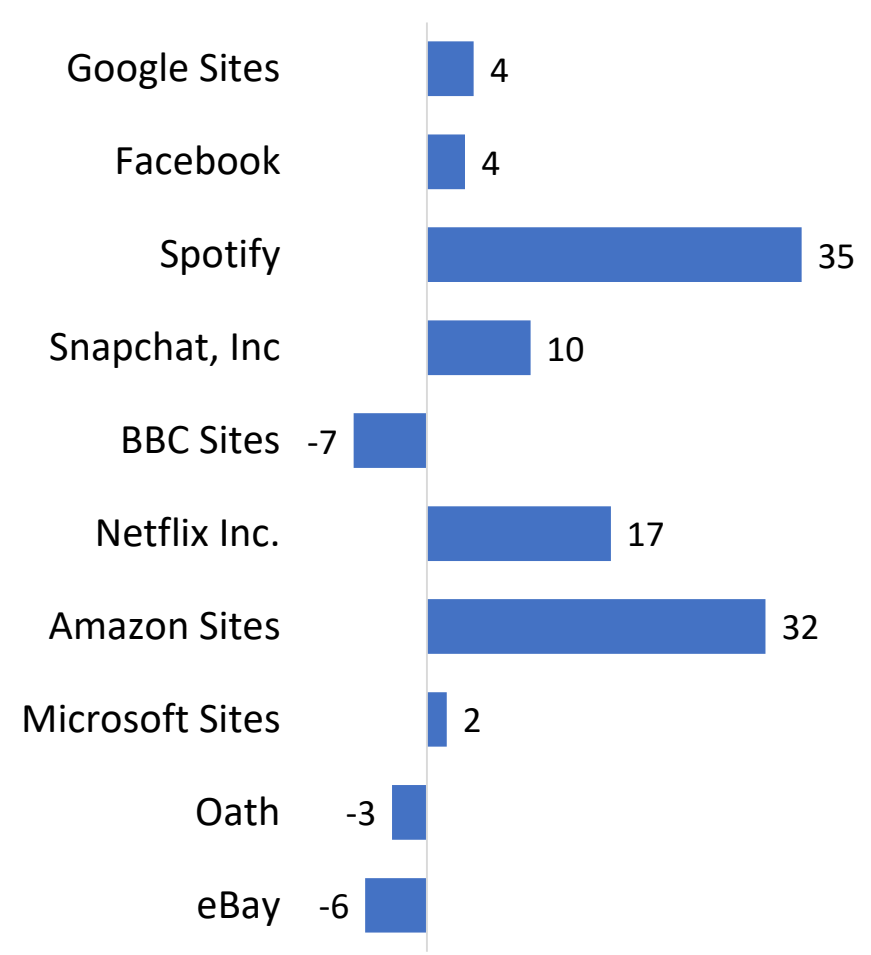
Amazon, Sky, Spotify & Netflix witnessed most growth



Top 10 Unique Visitor Properties: UV % Change



Top 10 Time Spent Properties: Minutes % Change



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

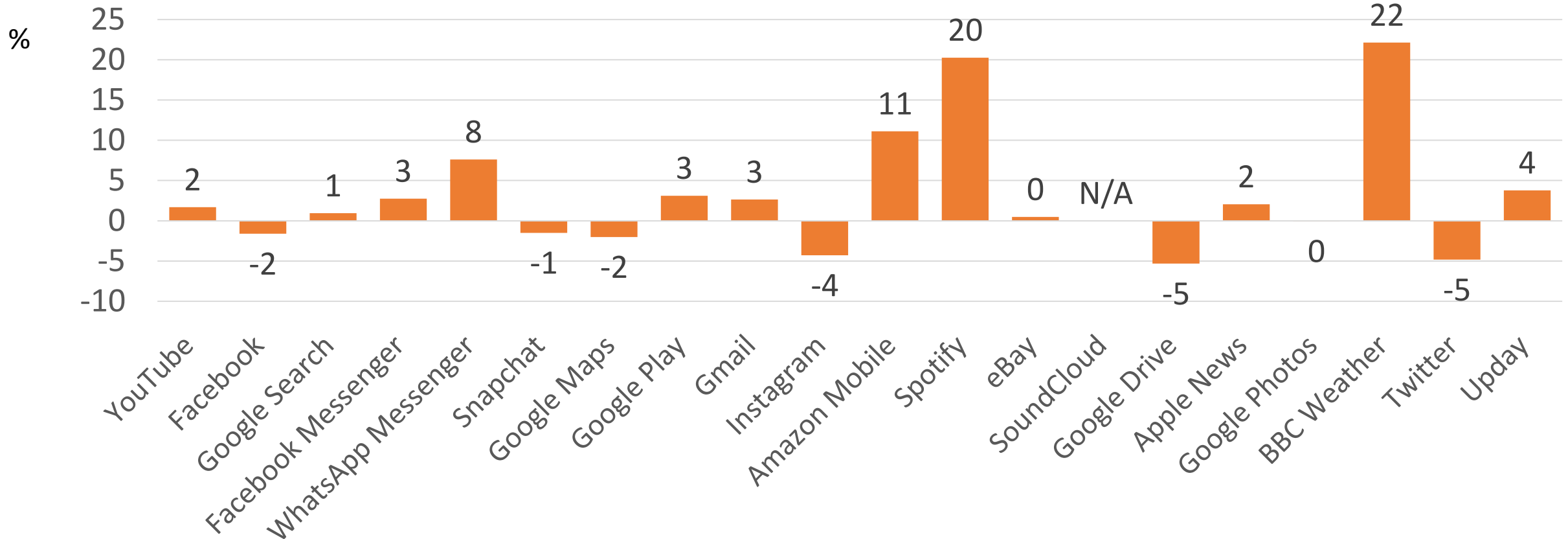
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.

Top 20 Mobile Apps by Unique Visitors - % Change Dec 18 v Sep 18

Large Audience gains for WhatsApp, Spotify & Amazon mobile apps



Unique Visitor % Change: Dec 2018 v Sept 2018



Source: Comscore MMX Multi-Platform, Dec 2018, Mobile age 18+

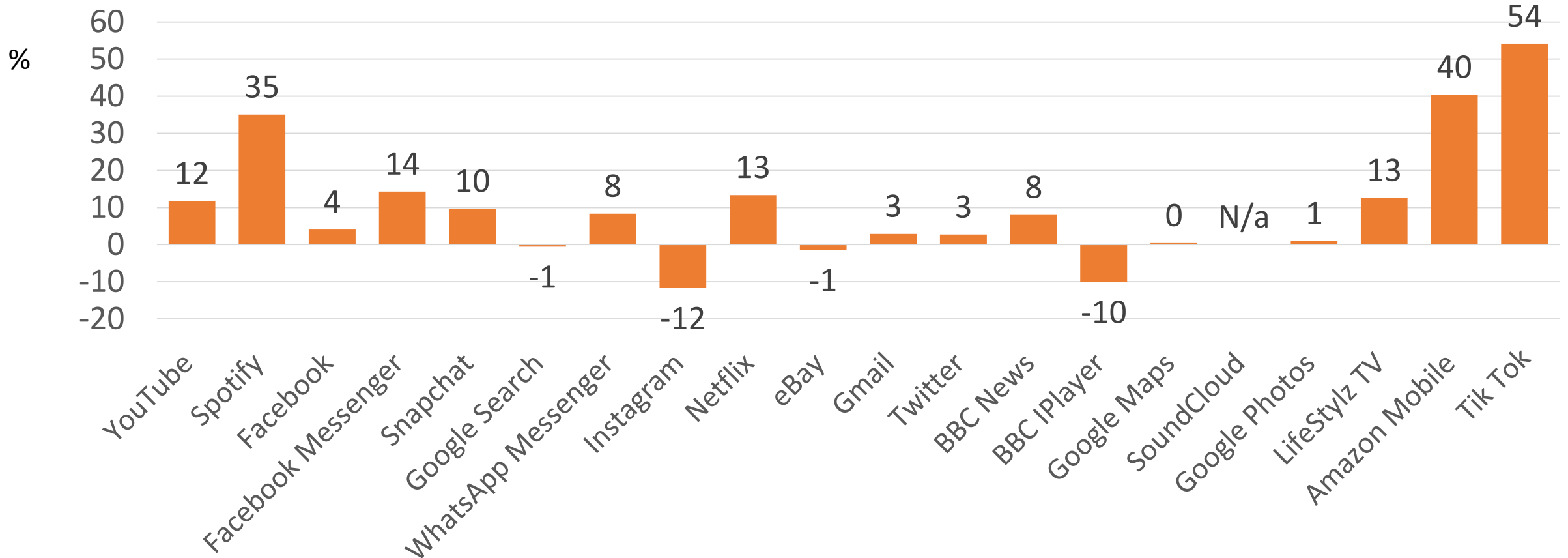
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.
*SoundCloud data is excluded due to an unresolved tagging issue

Top 20 Mobile Apps by Minutes - % Change Dec 18 v Sep 18

Large time online gains for Amazon, Spotify and TikTok



Minutes % Change: Dec 2018 v Sept 2018



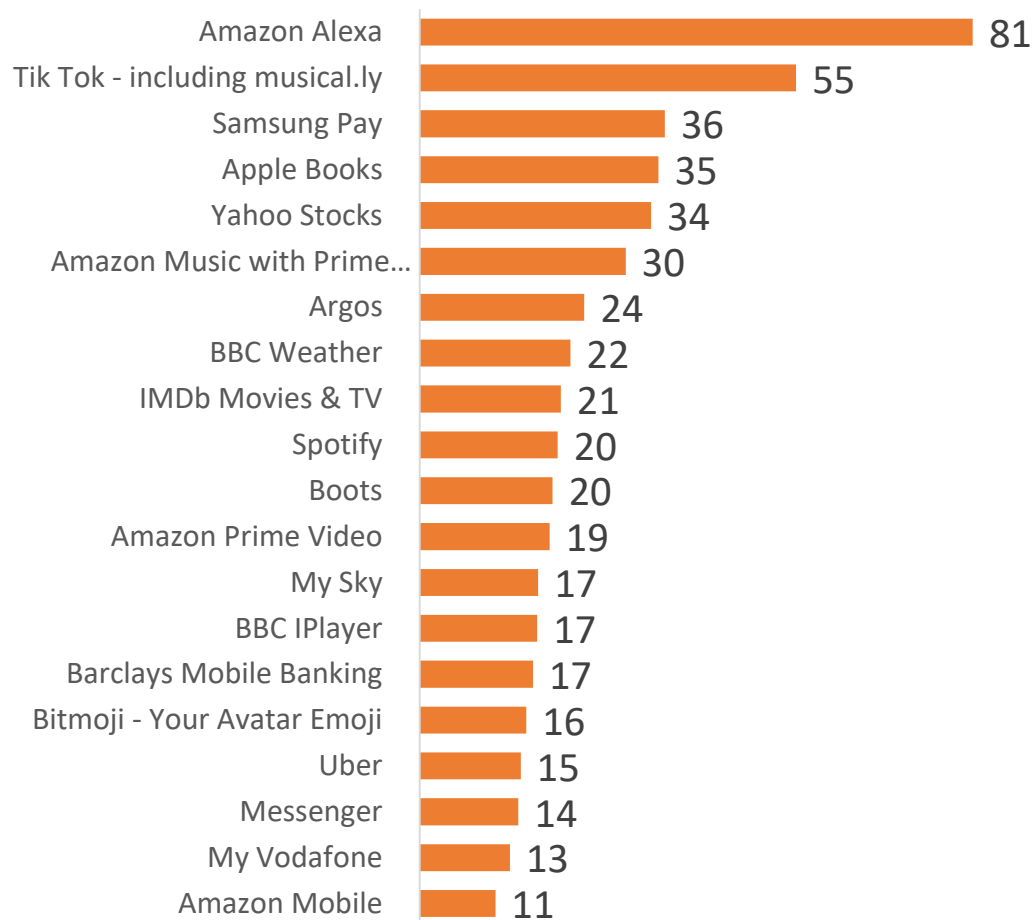
Source: comScore MMX Multi-Platform, Dec 2018, Mobile age 18+

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. * SoundCloud data is excluded due to an unresolved tagging issue

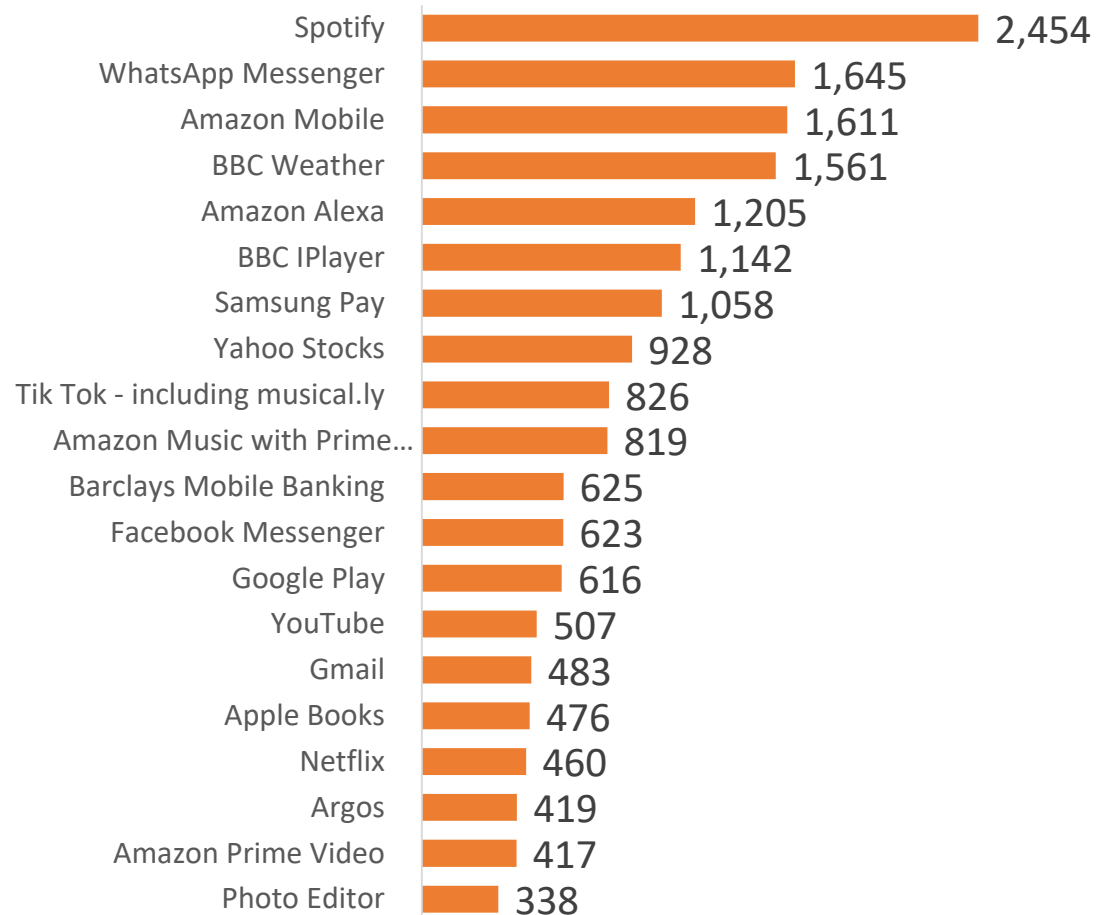
Biggest Unique Visitor Growth among top 100 mobile apps: Dec 18 v Sep 18

Amazon Alexa, TikTok, Spotify & WhatsApp continue to add visitors

Last 3 month UV % Growth

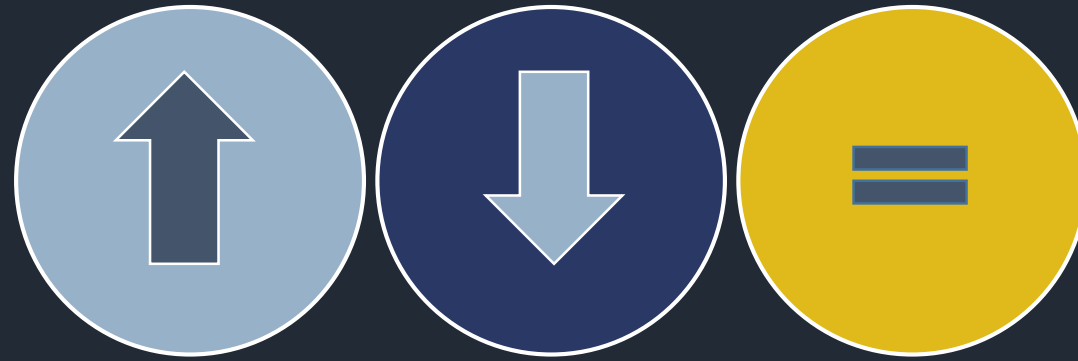


Last 3 month UV Growth (000s)



Source: Comscore MMX Multi-Platform, Dec 2018, Adults 18+

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



Key Changes: Retail

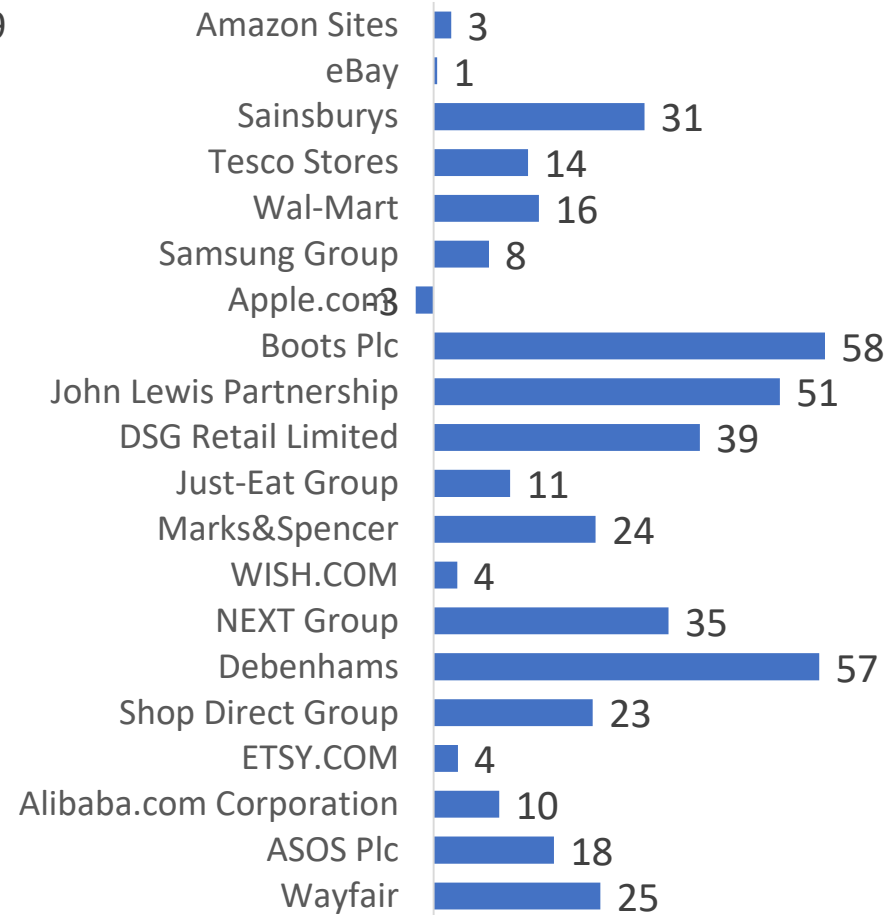
Top 20 Retail Properties in Dec 18 and Audience Change Since Sept 18

As expected, the festive period saw audience uplifts for the online retailers

Top 20 Retail Properties - Unique Visitors



Last 3 month % Change – Dec 18 v Sept 18



Sainsburys
Growth
includes
Argos
(+35%)

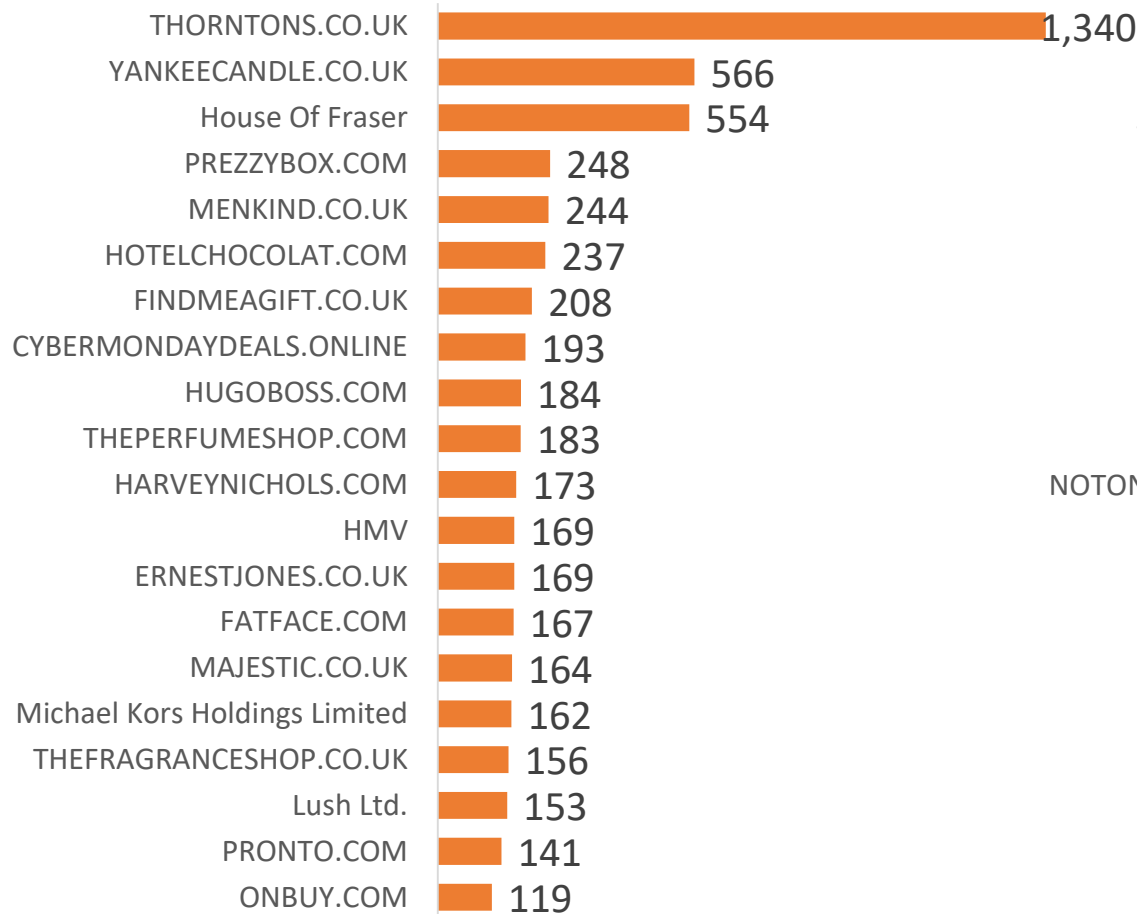
Source: Comscore MMX Multi-Platform, Dec 2018, Adults 18+

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

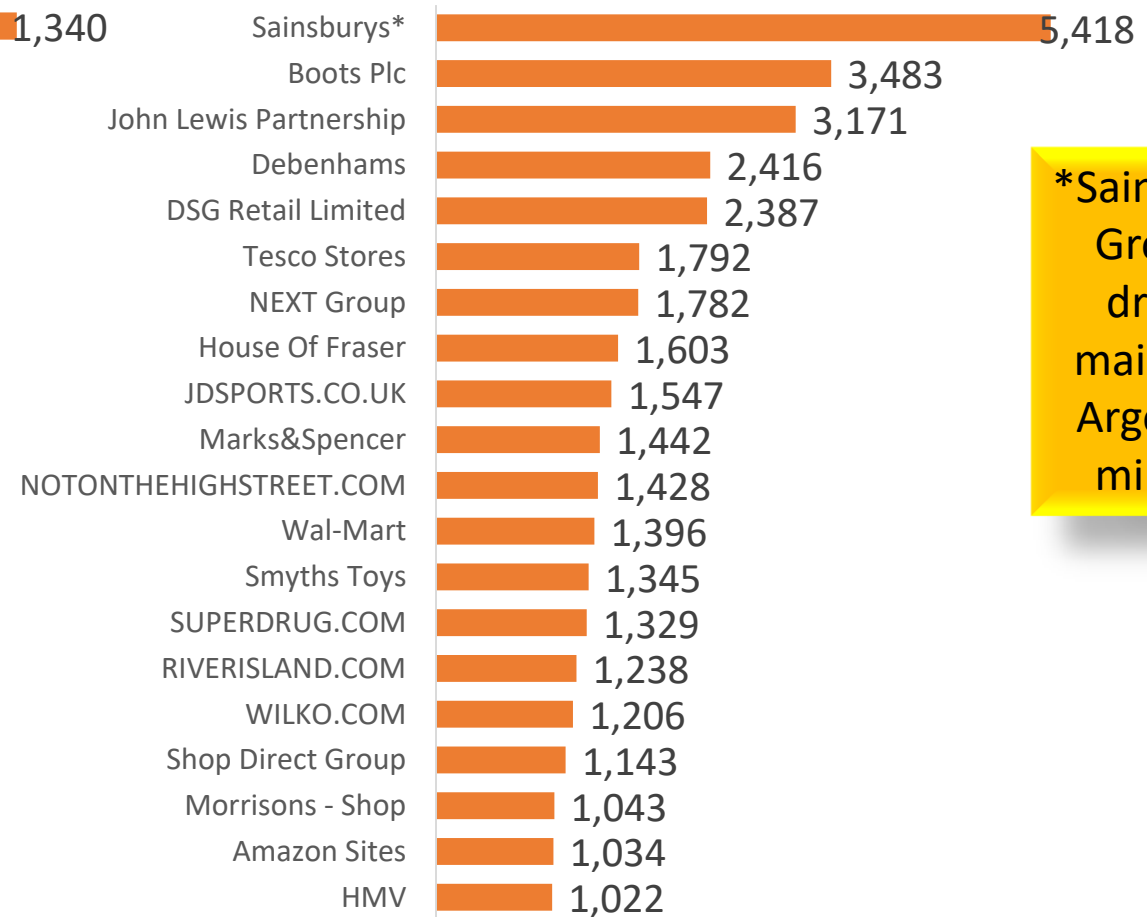
Unique Visitor Growth among top 200 online retail properties: Dec 18 v Sep 18

Gift & Luxury goods dominated the top 20 for % growth online retailers

Last 3 month: Top UV % Growth



Last 3 month: Top UV increase (000s)



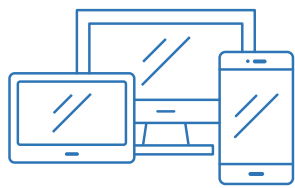
***Sainsbury's Growth driven mainly by Argos (+5 million)**

Source: Comscore MMX Multi-Platform, Dec 2018, Adults 18+

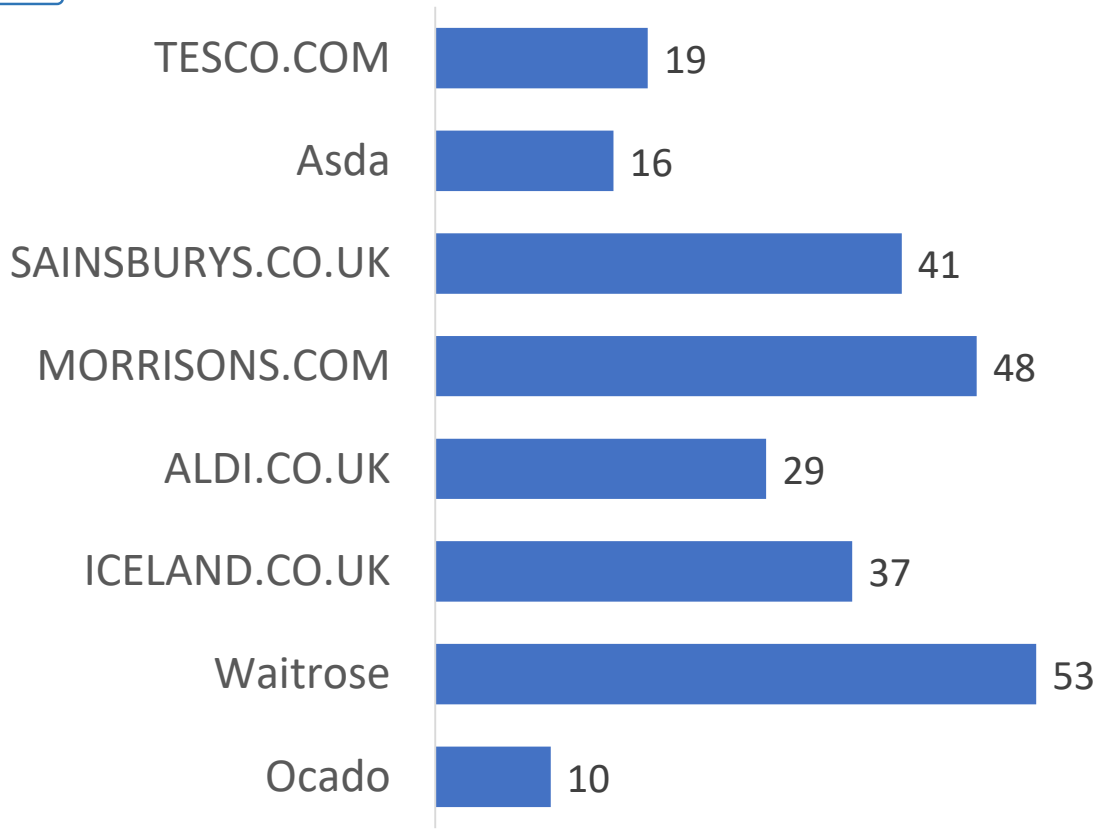
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Grocery Retailers Audience Change: Last 3 months & Yr-on-Yr

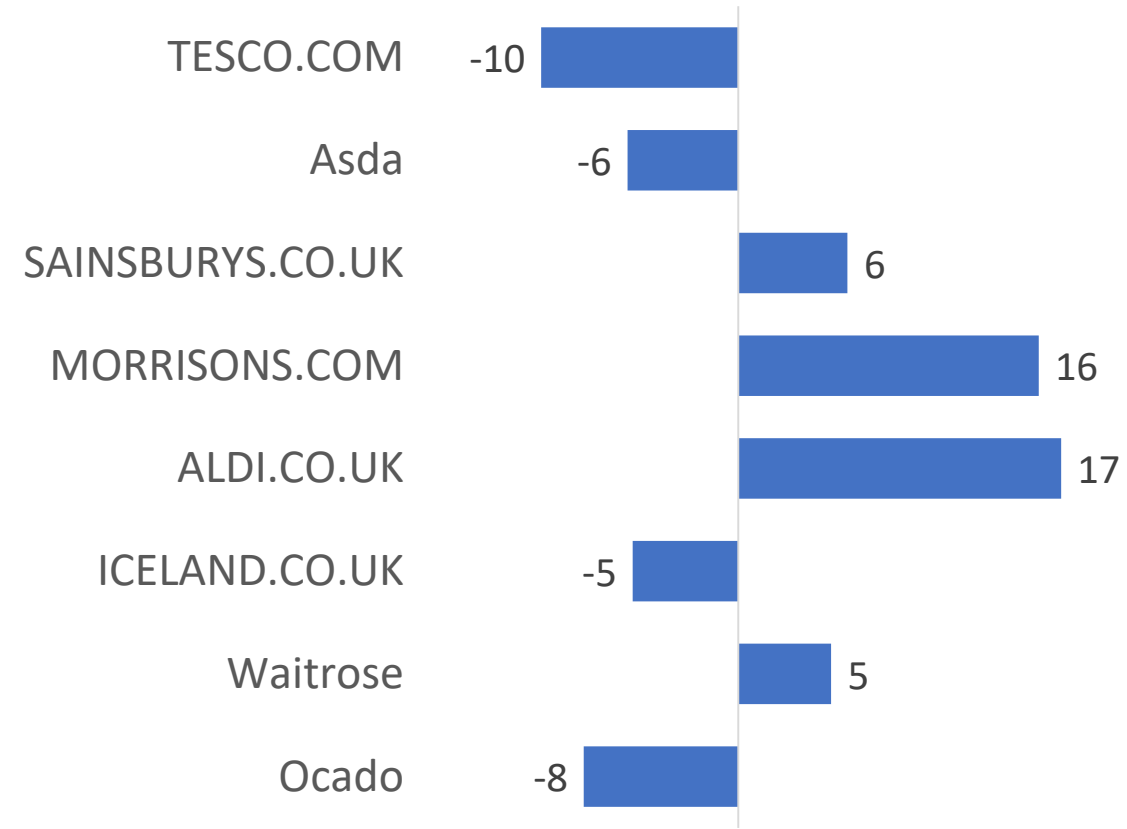
Budget Supermarkets are witnessing highest growth yr-on-yr



Sep to Dec 18: Unique Visitor Change



Yr-on-yr Unique Visitor Change



Source: Comscore MMX Multi-Platform, Dec 18 v Dec 17 Adults 18+



MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. Entities selected are: (E) for Tesco which excludes Tesco Bank, (M) for Asda, Sainsburys (which excludes Argos and Sainsburys Bank), Morrisons, Aldi & Waitrose, (P) for Iceland & Ocado.



Questions?

Find out more at: <http://www.ukom.uk.net/>
Email us at: 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*
- **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*
- **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*

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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

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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/