

# The UK Online Audience


Julie Forey  
IAB Research Breakfast  
Feb 2019



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## Digital Market Overview




**Q4 2018 UK Digital Market Overview report**

Insights include: the 'mobile only' audience has grown by 7% points over the last year, up from 25% to 32% of the UK online adult population; and, compared to September 2018, of the top 10 sites by unique visitors, Amazon (+3%) and Sky (+4%) saw the greatest percentage uplift in audience...



**Q3 2018 UK Digital Market Overview report**

Insights include: mobile devices account for 75% of all adults time online, women spend more time online on via mobiles than men and almost one third of all adults now access the internet only via mobile devices...



**Q2 2018 UK Digital Market Overview report**

Insights include: Platform time is influenced heavily by content and service; smartphones account for over 80% for categories such as messenger, social media, maps and personals. 29% of online adults are now mobile only...

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## Insights



**Death of the High Street: Department Stores**

Last week, Mike Ashley, the Sports Direct retail tycoon, told a House of Commons select committee 'It's not my fault the high street is dying... It's very very simple, the internet is killing the high street'. So this month UKOM looks at how many people visit the high street department stores online and how this compares with Amazon, the global giant which has had the biggest impact on the sector.



**Budget time. How the UK tightens its belt online**

October 29th is the date that the Treasury has set for this year's Autumn budget, when the Chancellor, Phillip Hammond, will announce his plans for tax and spending changes. With the budget just around the corner and Christmas looming, this month UKOM looks at the online services which can help consumers tighten their belts and grab a bargain during the festive season. How big are they and who uses them?



**How much time do people spend online each day?**

The IPA recently launched its latest Touchpoints survey which compared how much time people spend on different media each day. In the study online time was split across several categories so this month UKOM asks 'How much time do people spend online per day in total and how does this differ by audience?'

04.10.2018



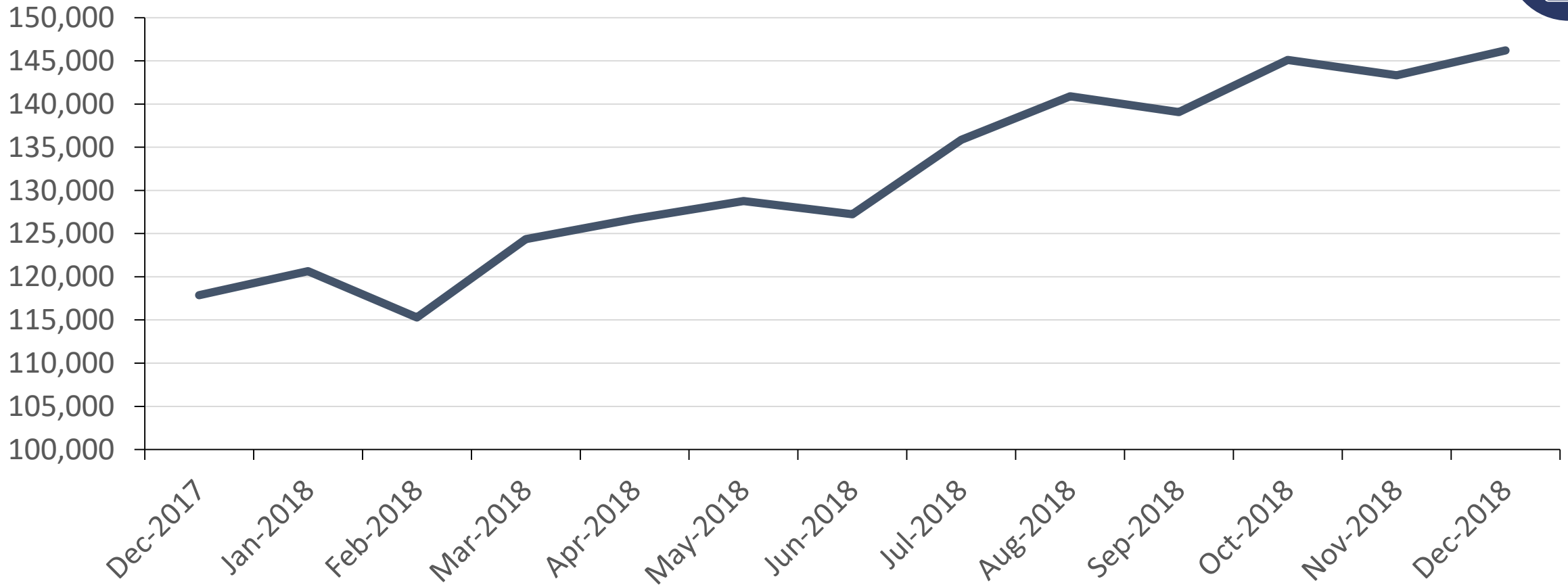
# 1. Smartphone app growth

# Smartphone App Minutes Dec 2017 to Dec 2018

Smartphone App minutes continue to grow

MM

Smartphone App Total Minutes



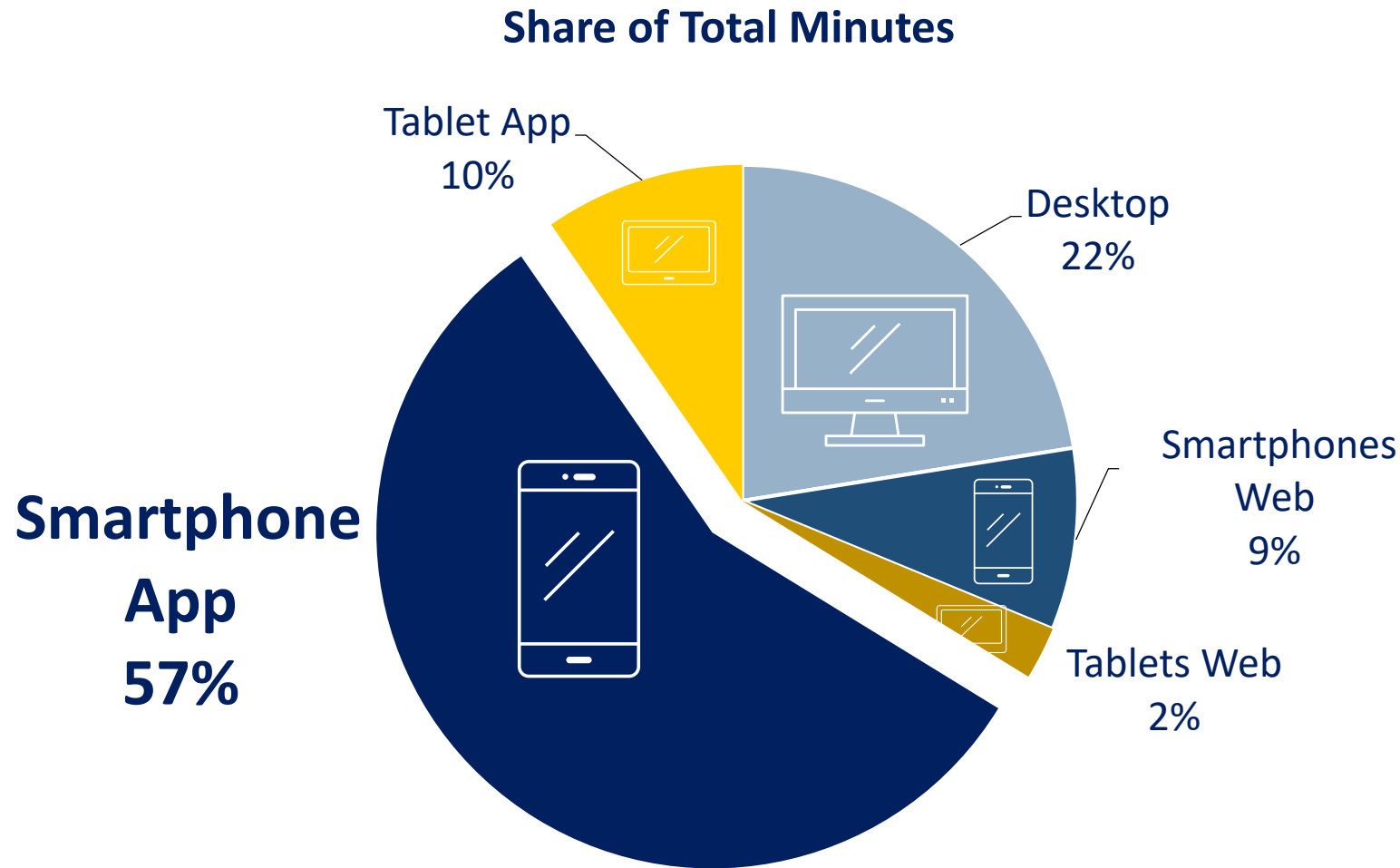
comscore

Source: Comscore Mobile Metrix, Dec 2017 - 2018, UK, Adults 18+

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# Share of Minutes by Platform & Mobile Access

Smartphone apps now account for 57% of all time spent



Source: Comscore MMX Multi-Platform & Mobile Metrix, 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'

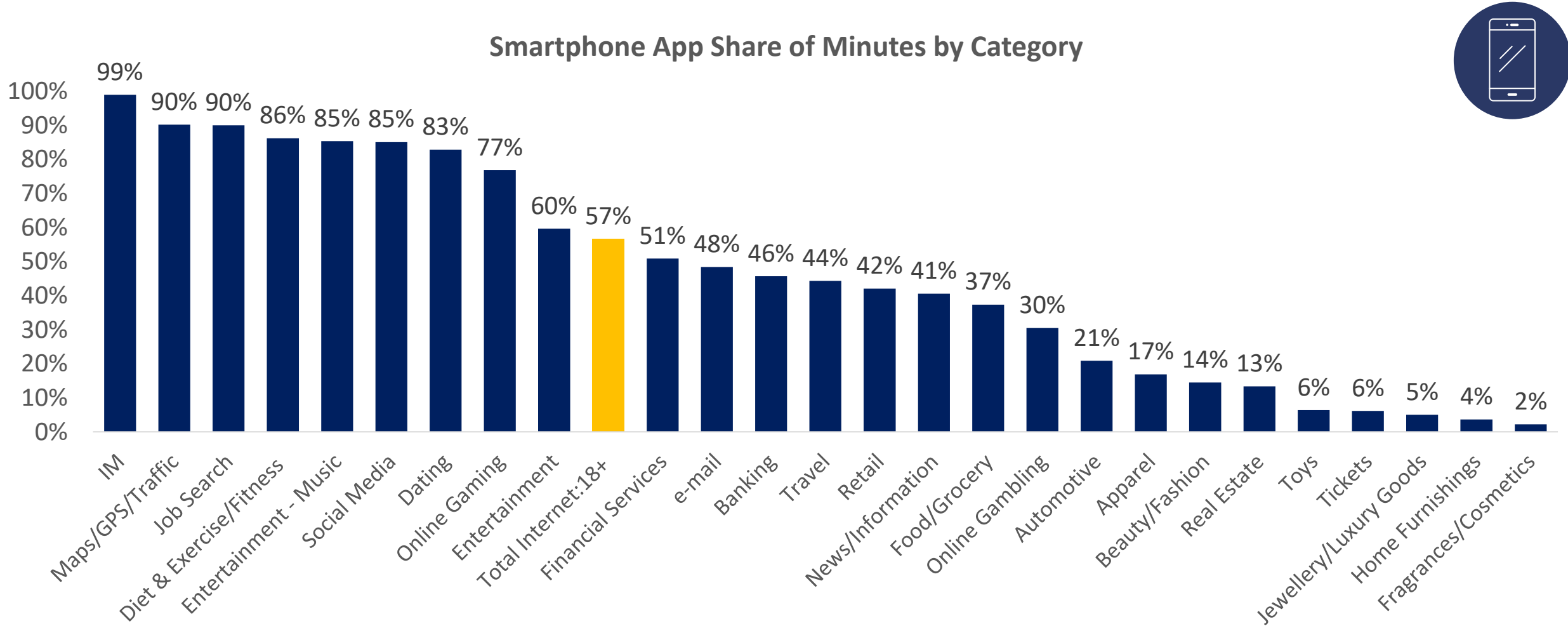


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# Smartphone App share of minutes by Category

## Huge variations in SOM by category and service



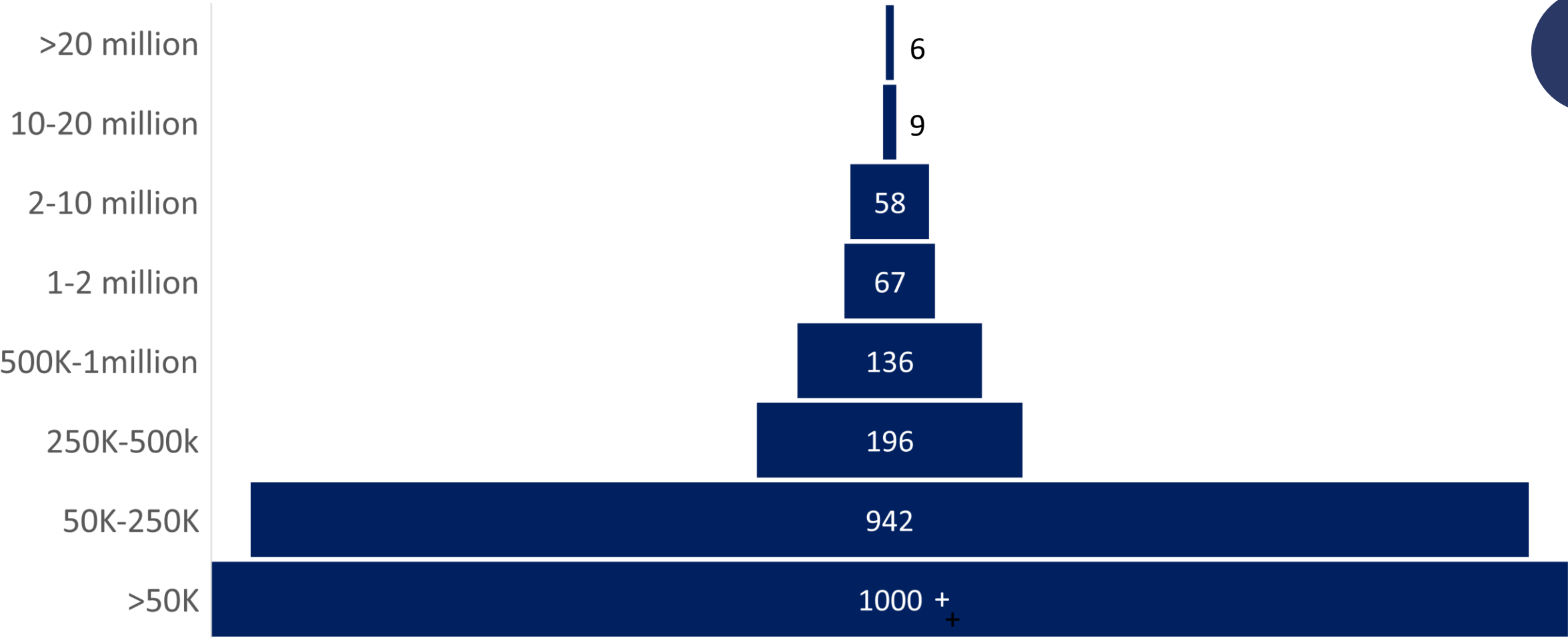
comscore

Source: Comscore Mobile Metrix, Dec 2018, UK, Adults 18+

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# Smartphone App Numbers by Audience Size

15 Apps have an audience over 10 million



# Top Smartphone Apps by Unique Visitors

11 of the 15 apps with >10 million users are from Google or Facebook

Smartphone App  
Top 15 Unique  
Visitors (000s)  
Dec 2018

1	YouTube	26,485
2	Facebook	24,178
3	WhatsApp Messenger	23,018
4	Google Search	22,970
5	Facebook Messenger	21,989
6	Google Play	20,398
7	Google Maps	19,470
8	Gmail	17,745
9	Snapchat	16,906
10	Instagram	15,348
11	Amazon Mobile	14,483
12	Spotify	12,818
13	eBay	12,663
14	Google Drive	11,646
15	Google Photos	10,431



The BBC is the only UK  
brand to have a smartphone  
app in the Top 30 (BBC  
Weather and BBC News)



comscore

Source: Comscore Mobile Metrix, Dec 2018, UK, Adults 18+

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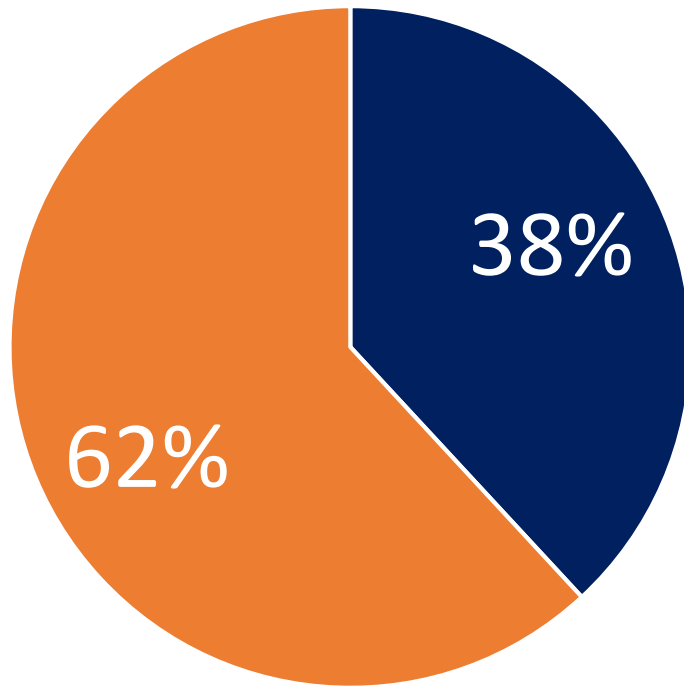


## 2. The iPhone and Android phone audience

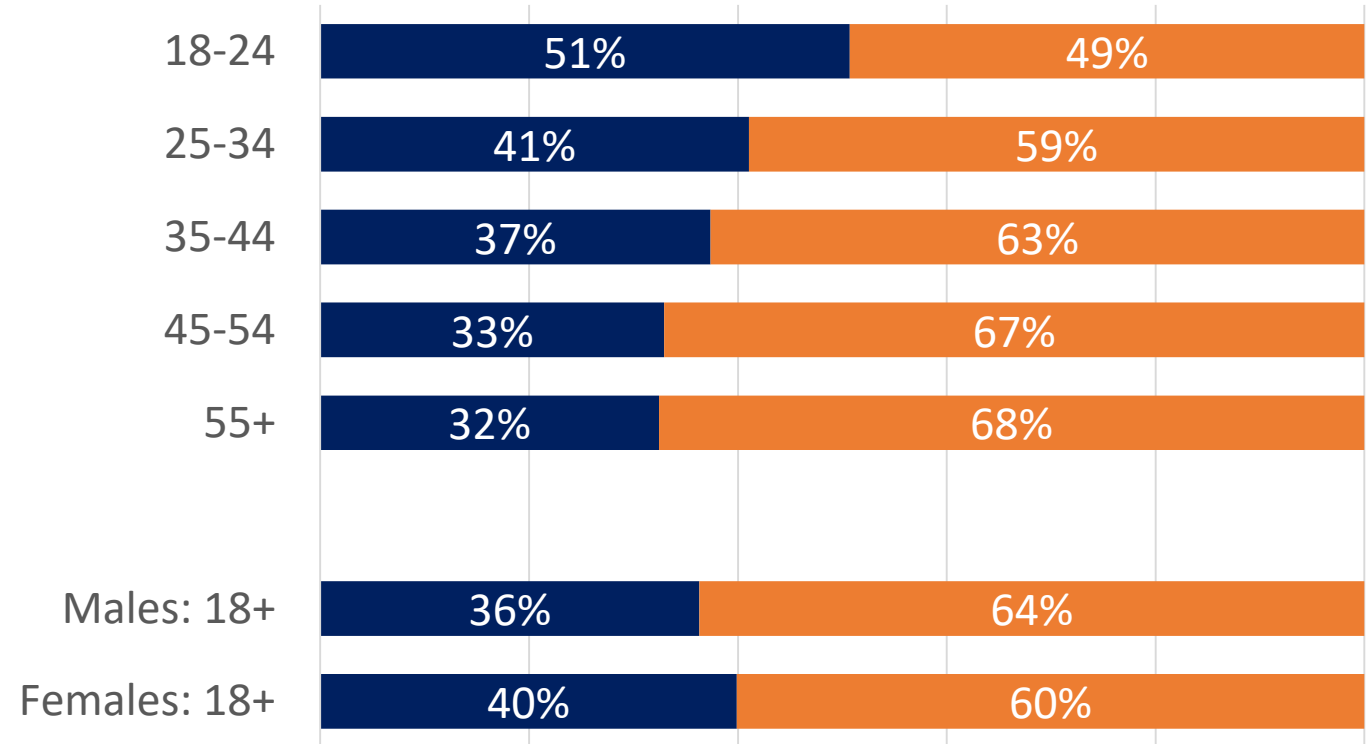
# Smartphone OS: Unique Visitor Age & Gender Profile - Dec 2018

## iPhone's appeal increases with decreasing age

Unique Visitors by OS - All Adults %



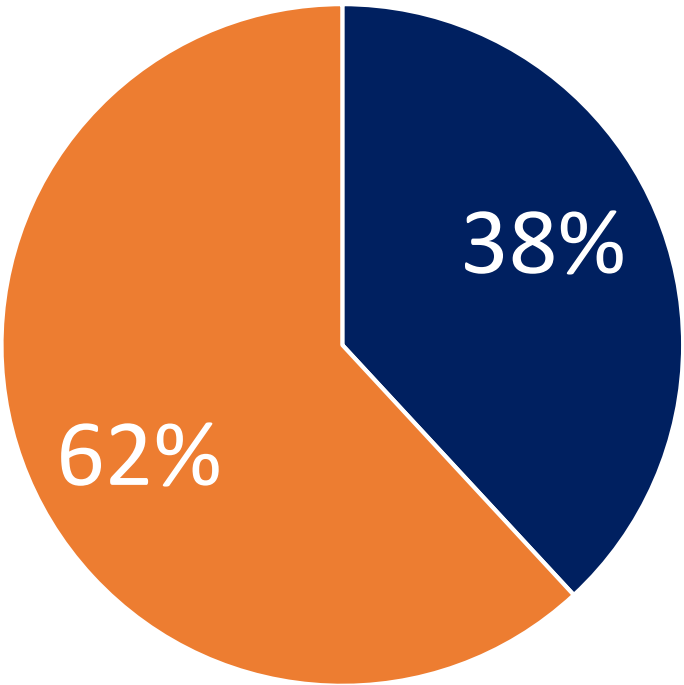
Unique Visitors by OS – Age & Gender %



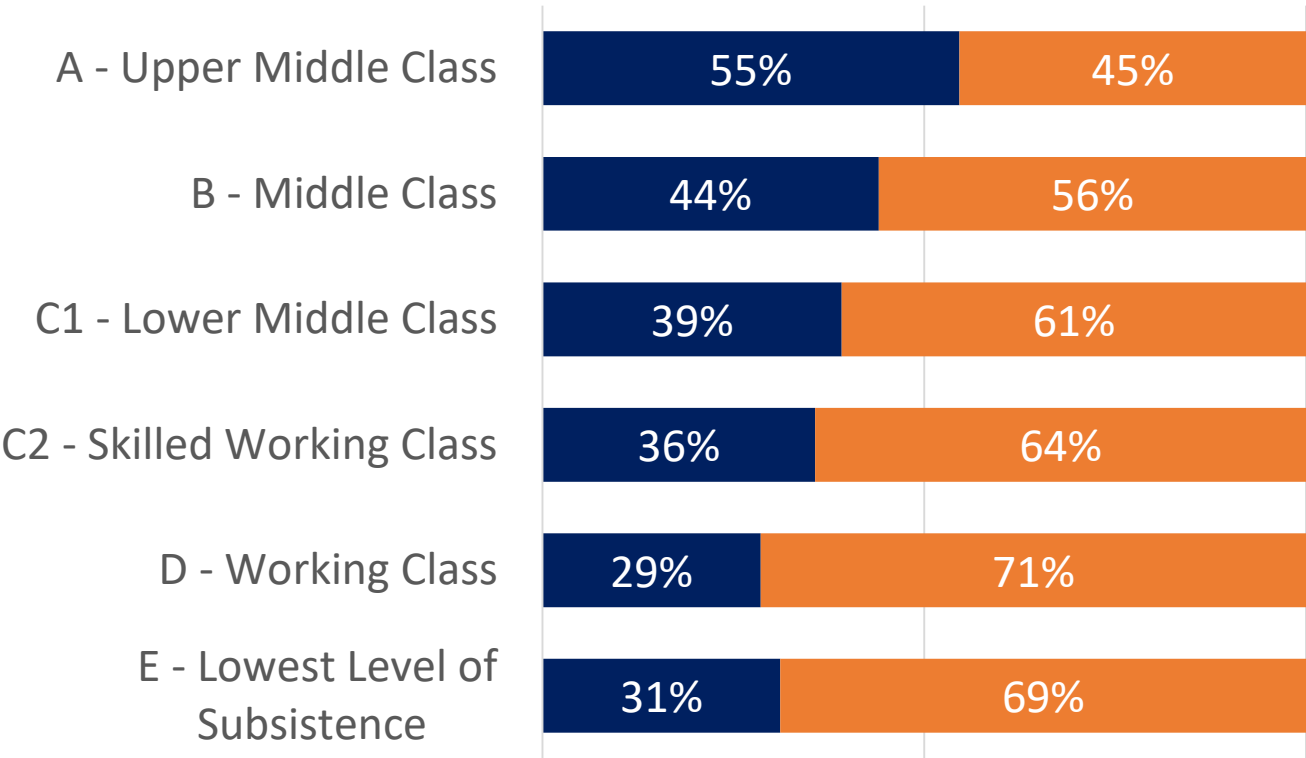
# Smartphone OS: Unique Visitor Social Grade Profile- Dec 2018

## iPhone's appeal increases with increasing social grade

Unique Visitors by OS - All Adults %



Unique Visitors by OS – Social Grade %



# Top 10 Smartphone Apps by Total Minutes by OS

Entertainment apps are top for iPhone users

Total  
Smartphone



## App Minutes Rank

- 1 Facebook
- 2 Spotify
- 3 YouTube
- 4 Facebook Messenger
- 5 Snapchat
- 6 WhatsApp Messenger
- 7 Instagram
- 8 Google Search
- 9 eBay
- 10 Gmail

 iPhone

## App Minutes Rank

- 1 • Spotify
- 2 • YouTube
- 3 • Snapchat
- 4 • SoundCloud
- 5 • Facebook
- 6 • Instagram
- 7 • Google Search
- 8 • Netflix
- 9 • Apple News
- 10 • eBay



## App Minutes Rank

- 1 Facebook
- 2 Facebook Messenger
- 3 Spotify
- 4 YouTube
- 5 WhatsApp Messenger
- 6 Google Search
- 7 Instagram
- 8 LifeStylz TV
- 9 eBay
- 10 Gmail



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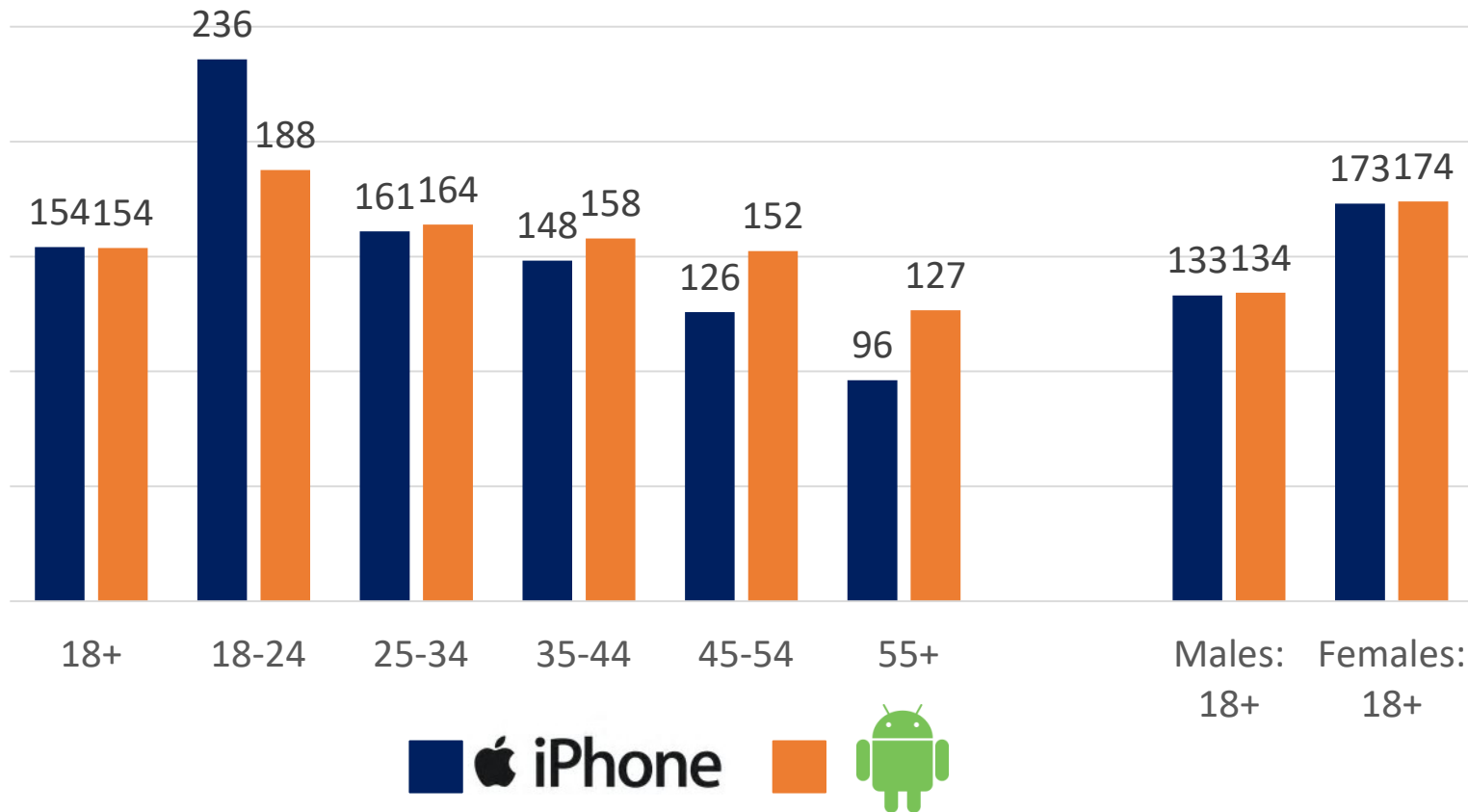
Source: Comscore Mobile Metrix, Dec 2018, UK, Adults 18+

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# Smartphone OS: Average Minutes/Day by Age & Gender

## 18-24 iPhone users spend most time on their devices

Average Minutes per Visitor per Day by Age: December 2018



ABC1 Female 35-54 iPhone user with kids

**Ave/Day: 161 Minutes**

Source: ComScore Dec 18



Julie Forey's iPhone

**Ave/Day: 167 Minutes**

Source: Julie Forey's iPhone w/e 7/2/19



comscore

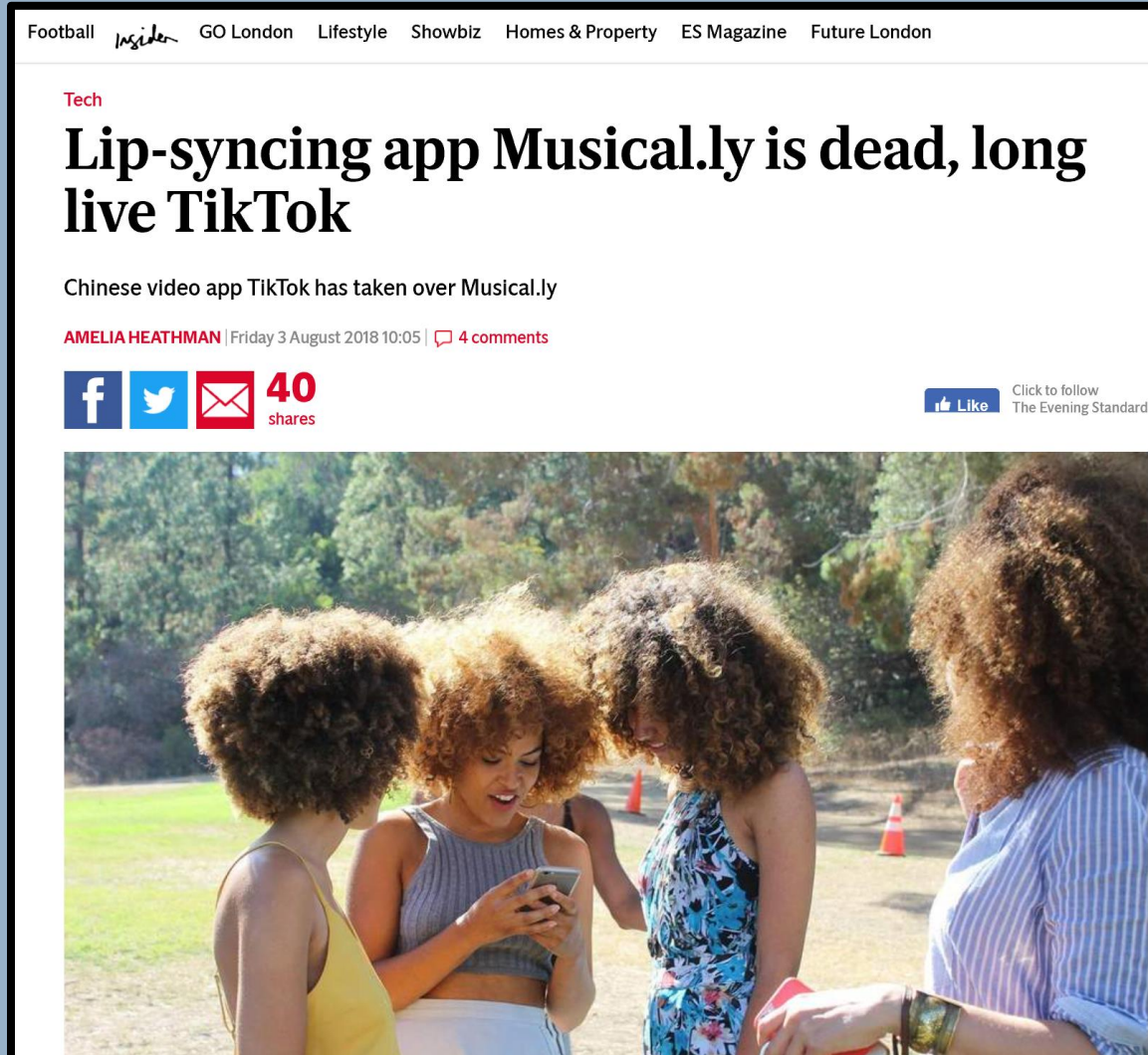
Source: Comscore Mobile Metrix, Dec 2018, UK, Adults 18+

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## 3. The rise of TikTok

# UKOM Insights: TikTok



*“TikTok is a destination for short-form mobile videos. Our mission is to capture and present the world's creativity, knowledge, and precious life moments, directly from the mobile phone. TikTok enables everyone to be a creator, and encourages users to share their passion and creative expression through their videos”*



# UKOM Insights: TikTok

**BREAKING** Papa John's jumps after WSJ says Starboard's Jeffrey Smith named chairman, fund invests \$200 m

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## How TikTok is climbing the download charts, taking on Snapchat and Twitter

- TikTok, owned by China-based company ByteDance, allows users to create and share short-form videos similar to those on SnapChat and Vine.
- TikTok is rapidly climbing the app download charts, and is taking aim at Snapchat's users.

Stephen Desaulniers | Julia Boorstin  
Published 10:00 AM ET Sat, 2 Feb 2019 | Updated 4:32 PM ET Sat, 2 Feb 2019

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## It's time to pay serious attention to TikTok

Sarah Perez @sarahintampa / 6 days ago Comment



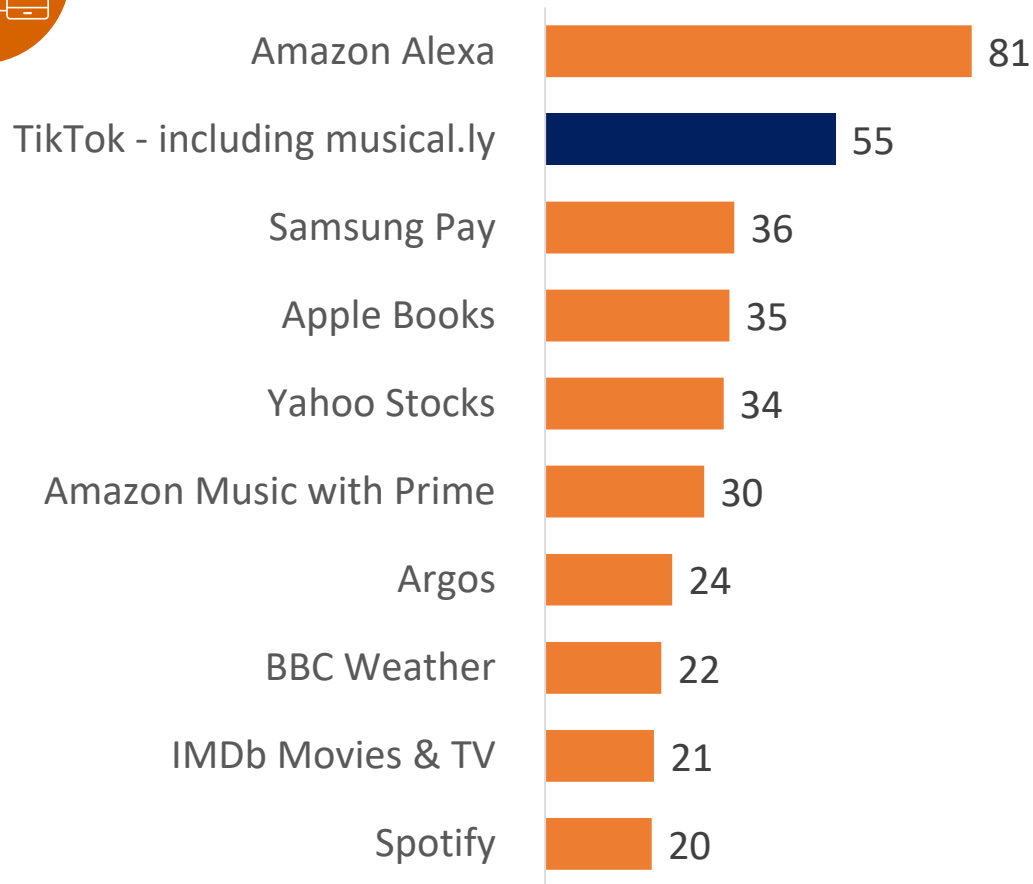


# Biggest Unique Visitor Growth among top 100 mobile apps: Dec 18 v Sep 18

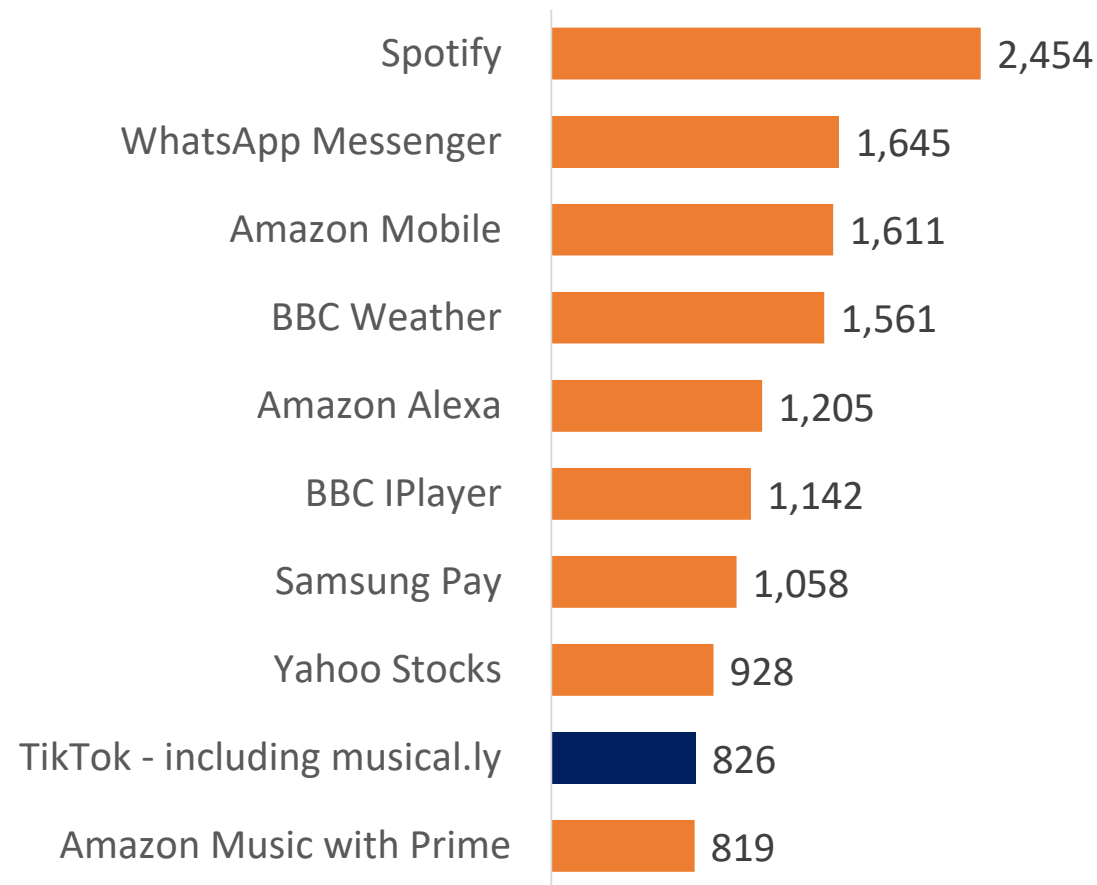
## TikTok in the top 10 for both % and 000s visitor growth



### Last 3 month UV % Growth



### Last 3 month UV (000s) Growth



comscore

Source: Comscore Mobile Metrix, Dec 2018, Adults 18+

Please note that 'mobile' includes smartphone and tablet app usage combined

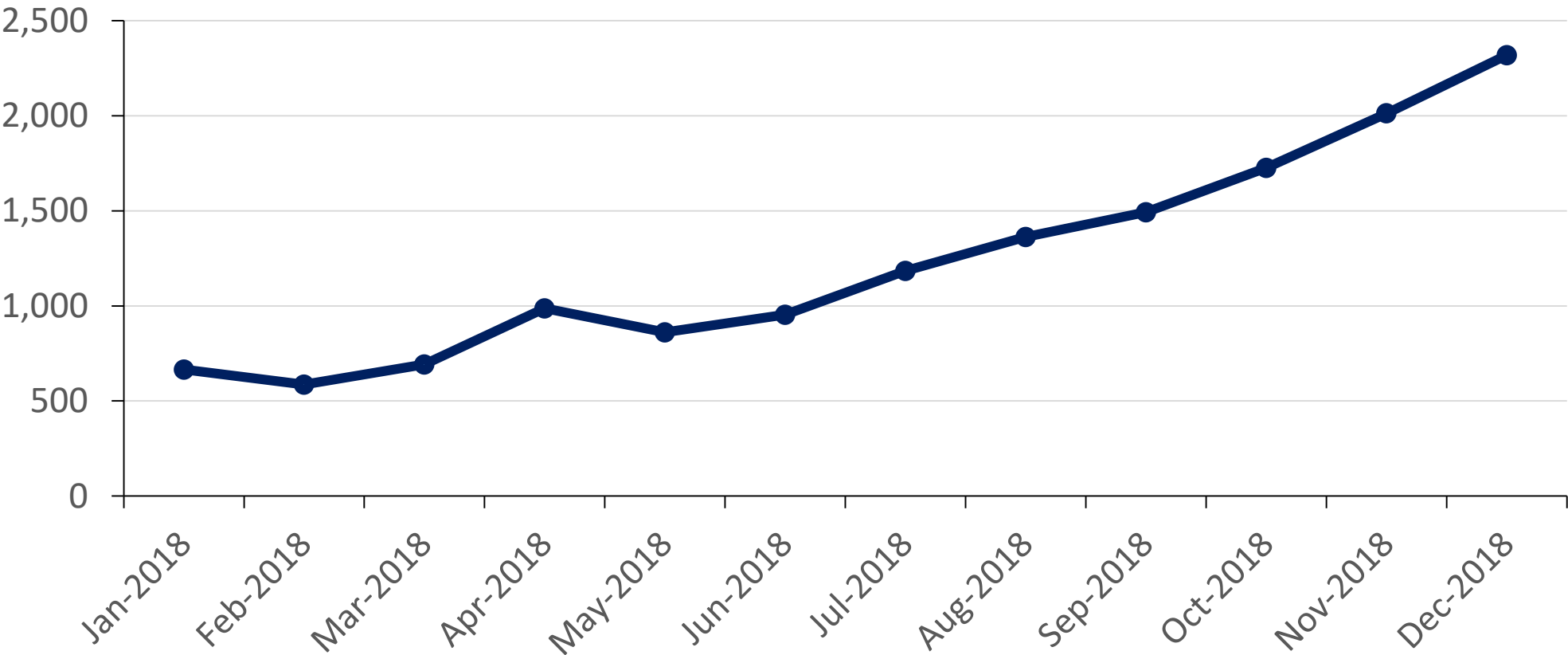
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# TikTok Mobile App UK Unique Visitor Growth – Jan to Dec 2018

## 2.3 million UK adults used the TikTok mobile app in December 2018



TikTok Mobile App Unique Visitors (000s): UK 18+

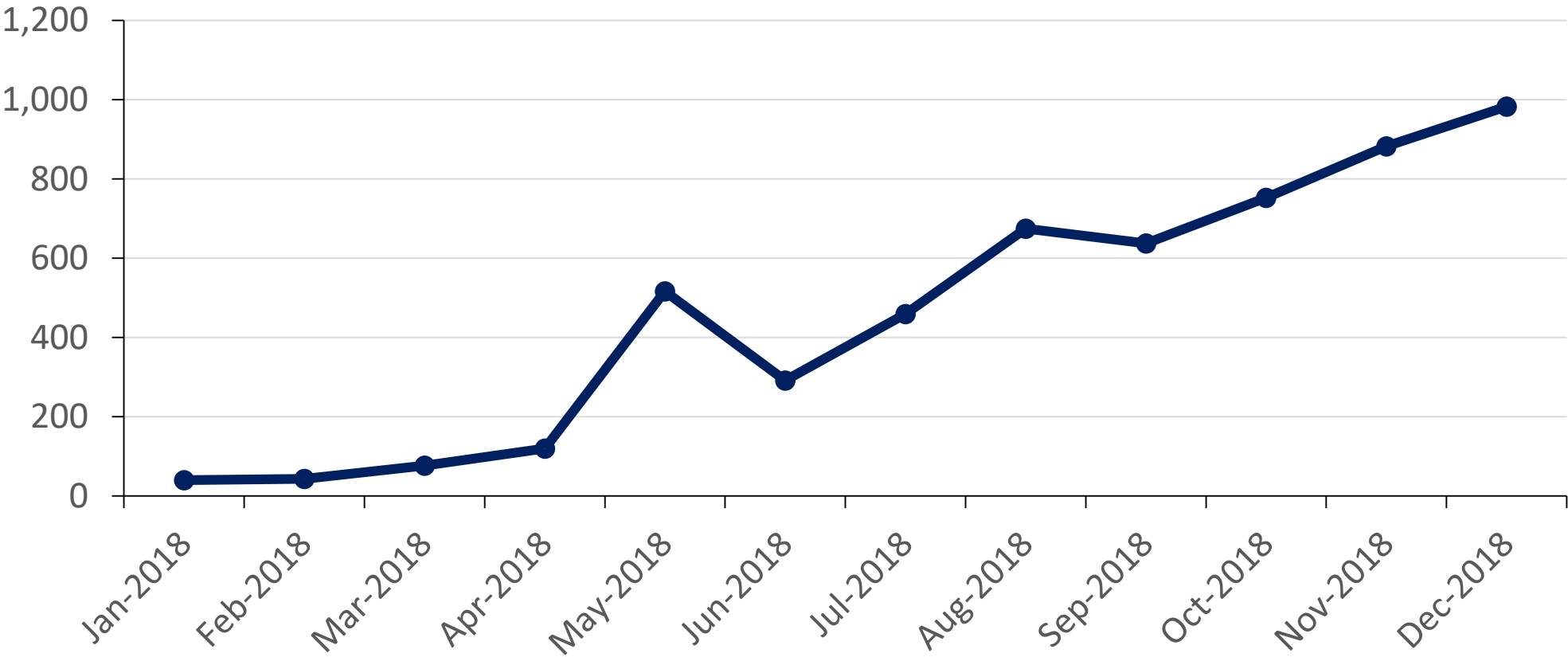


# TikTok Mobile App UK Time Online Growth – Jan to Dec 2018

TikTok Total App Minutes continue to increase



TikTok Mobile App Total Minutes (MM): UK 18+



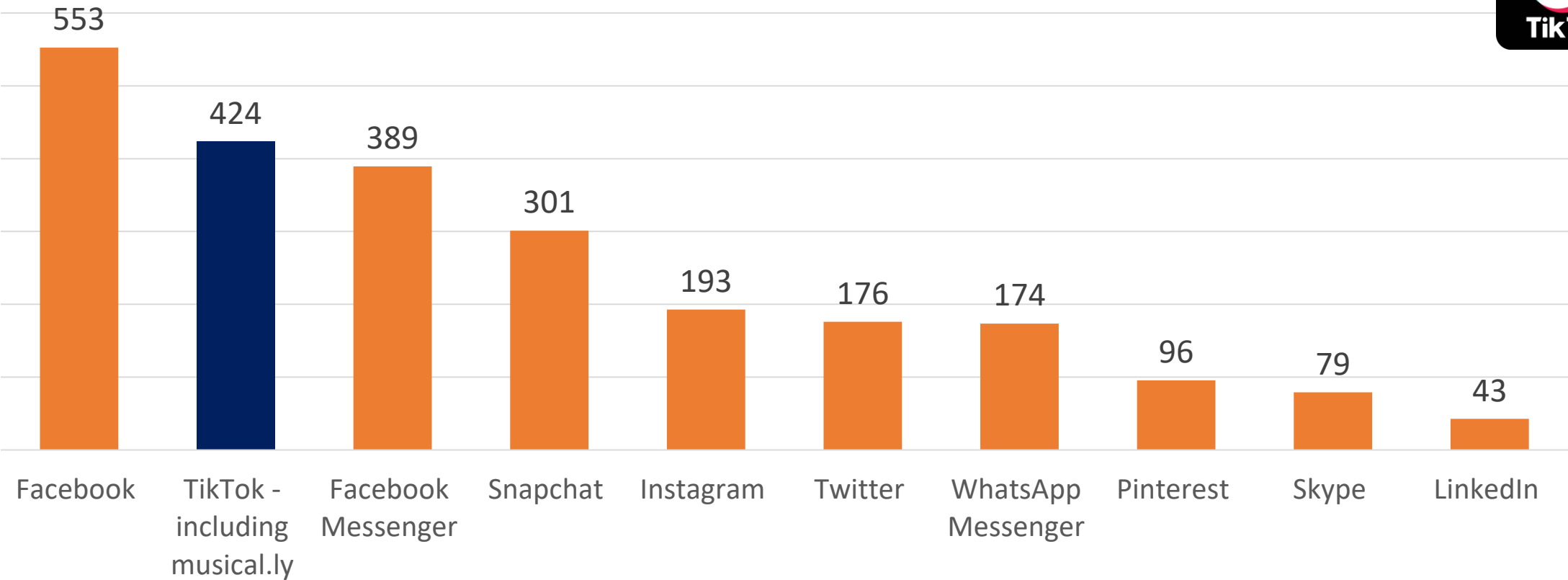
# Social and IM Mobile Apps: Average Minutes per Visitor Per Month - UK Adults

Average monthly time for TikTok App users is similar to leading social networks



## Social and IM Mobile Apps

Average Minutes Per Visitor Per Month: UK Adults, Dec 2018



comscore

Source: Comscore Mobile Metrix, Dec 2018, Adults 18+  
Please note that 'mobile' includes smartphone and tablet app usage combined



2002



Firefox

2003



2004



2005



2006



2007



2008



2009



2010



2011



2012



2013



2014



2015



2016



2017

???????

2002



Firefox

2003



2004



2005



2006



2007



2008



2009



2010



2011



2012



2013



2014



2015



2016



2017



# Questions?

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Email us at: [insights@ukom.uk.net](mailto:insights@ukom.uk.net)

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