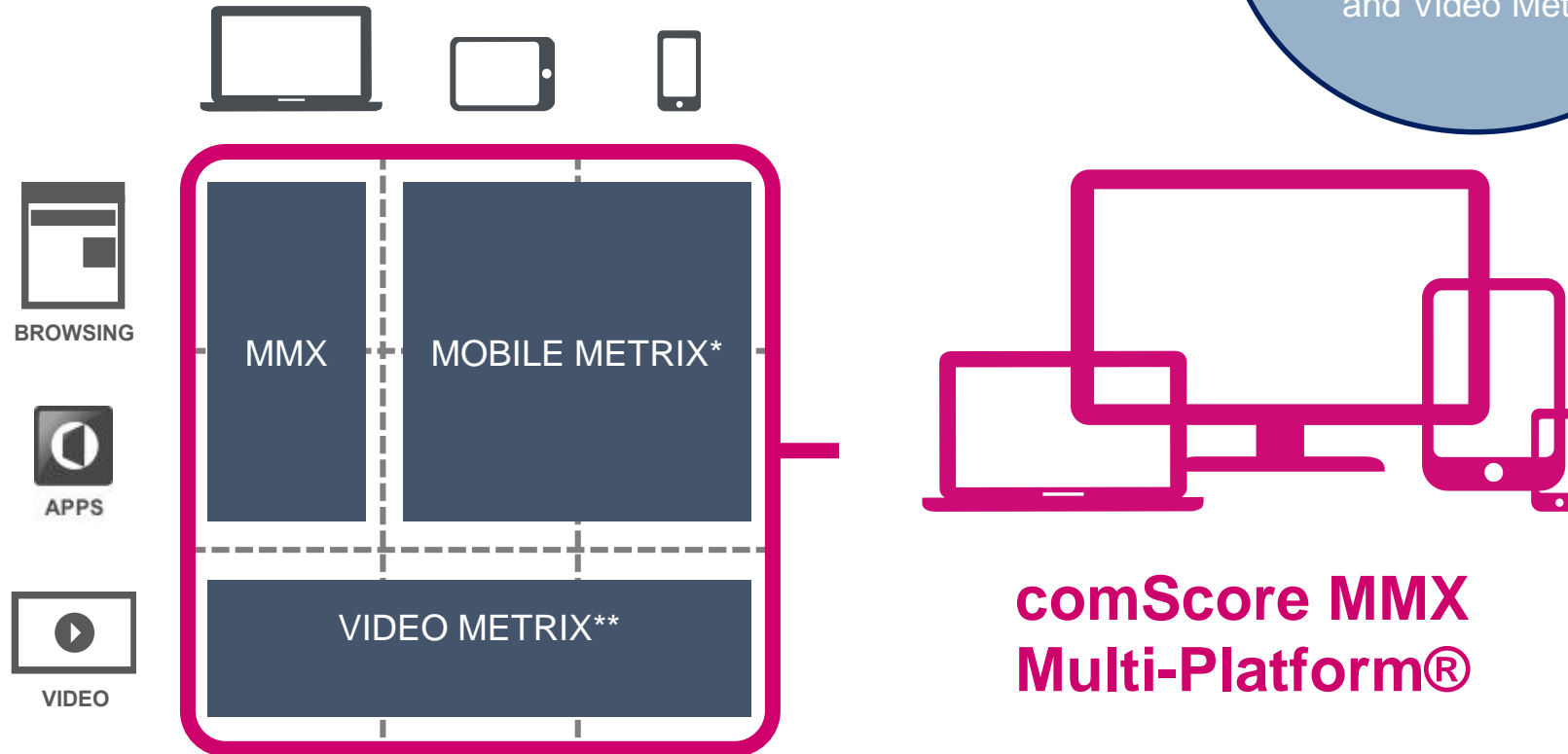


UK Digital Market Overview – March 2016

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

A Guide to Data Sources

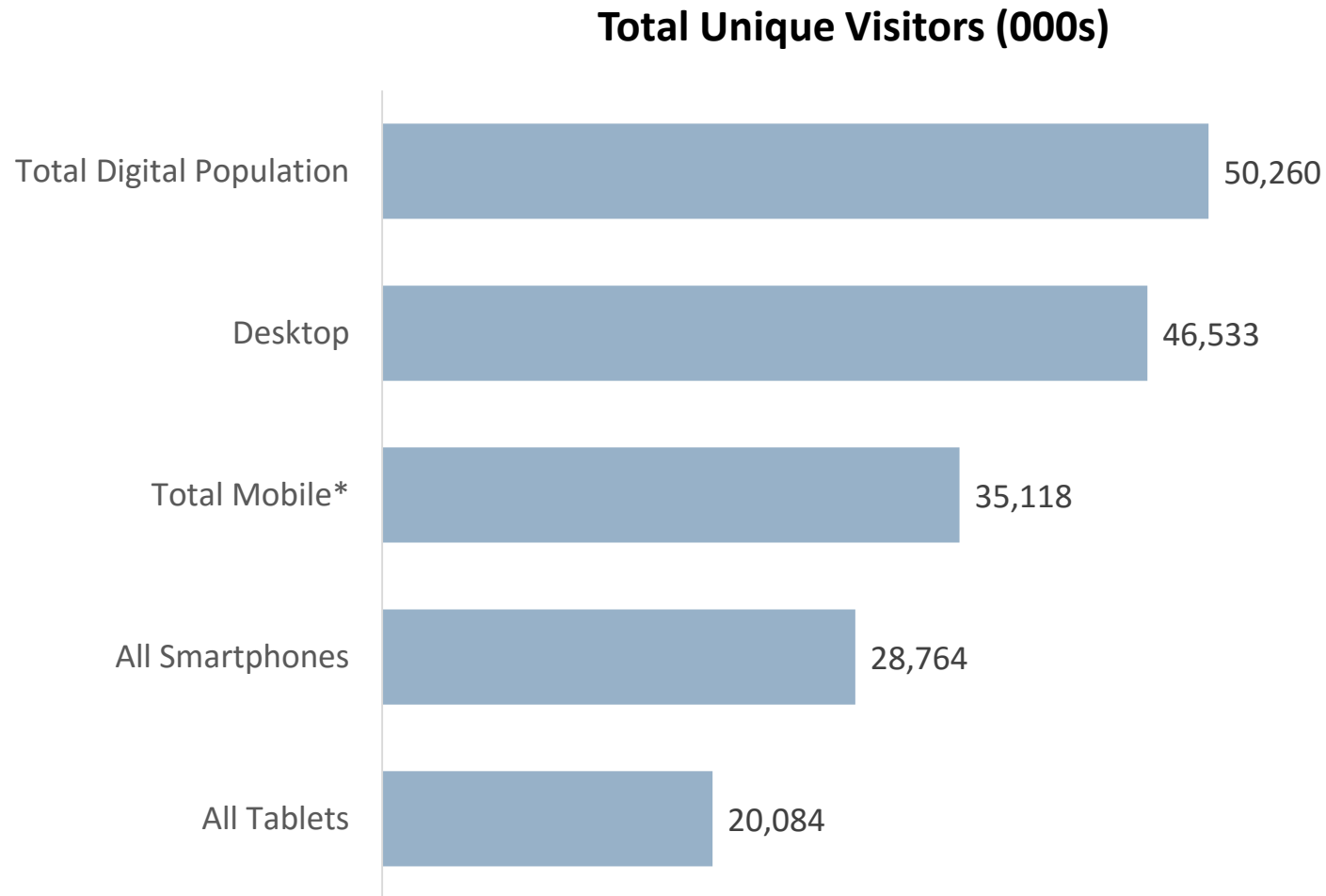
Total Digital
Population =
Unduplicated
audience across
MMX, Mobile Metrix
and Video Metrix



Multi-Platform Usage

Breakdown of Digital Audience – Unique Visitors by Platform

Total Digital Population across Desktop & Mobile devices was 50.2m in Mar 2016



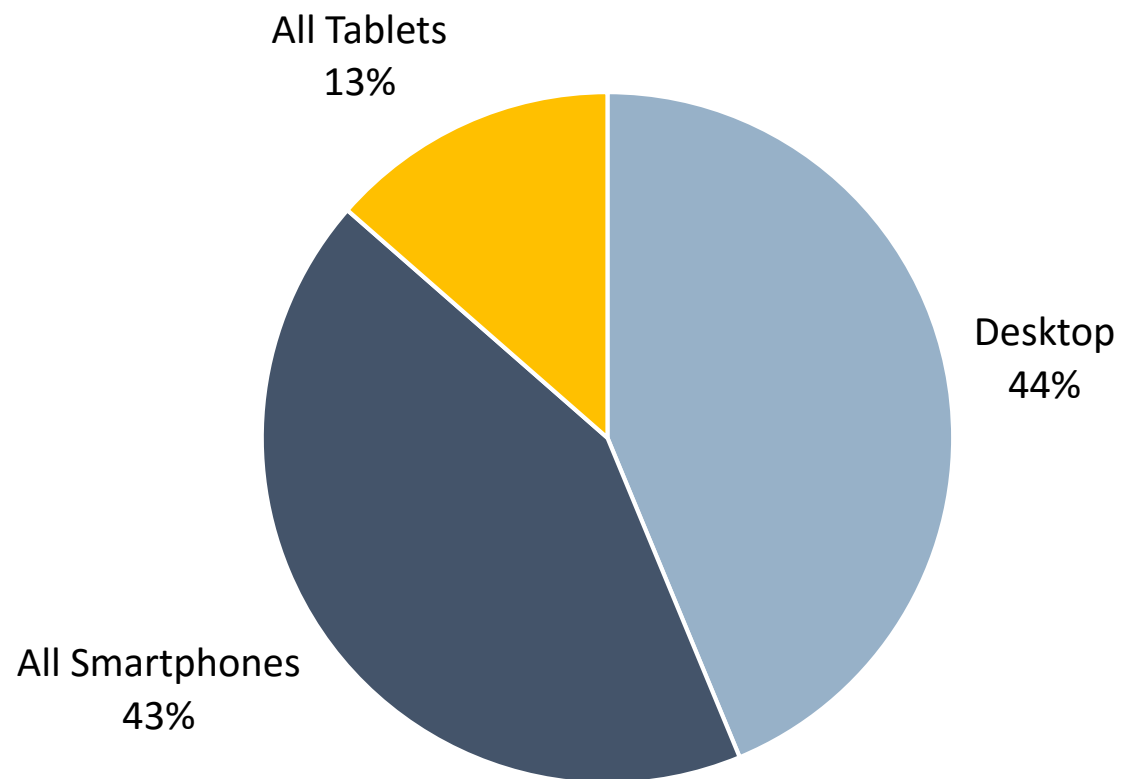
35.1m UK adults used a mobile device to access the internet in Mar 2016

3.7m of these did not use a desktop/laptop to access the internet

Share of Minutes by Platform (Total Digital Population)

The majority of adults' time online is now spent on mobile devices (56%)

Share of Minutes by Platform (18+)

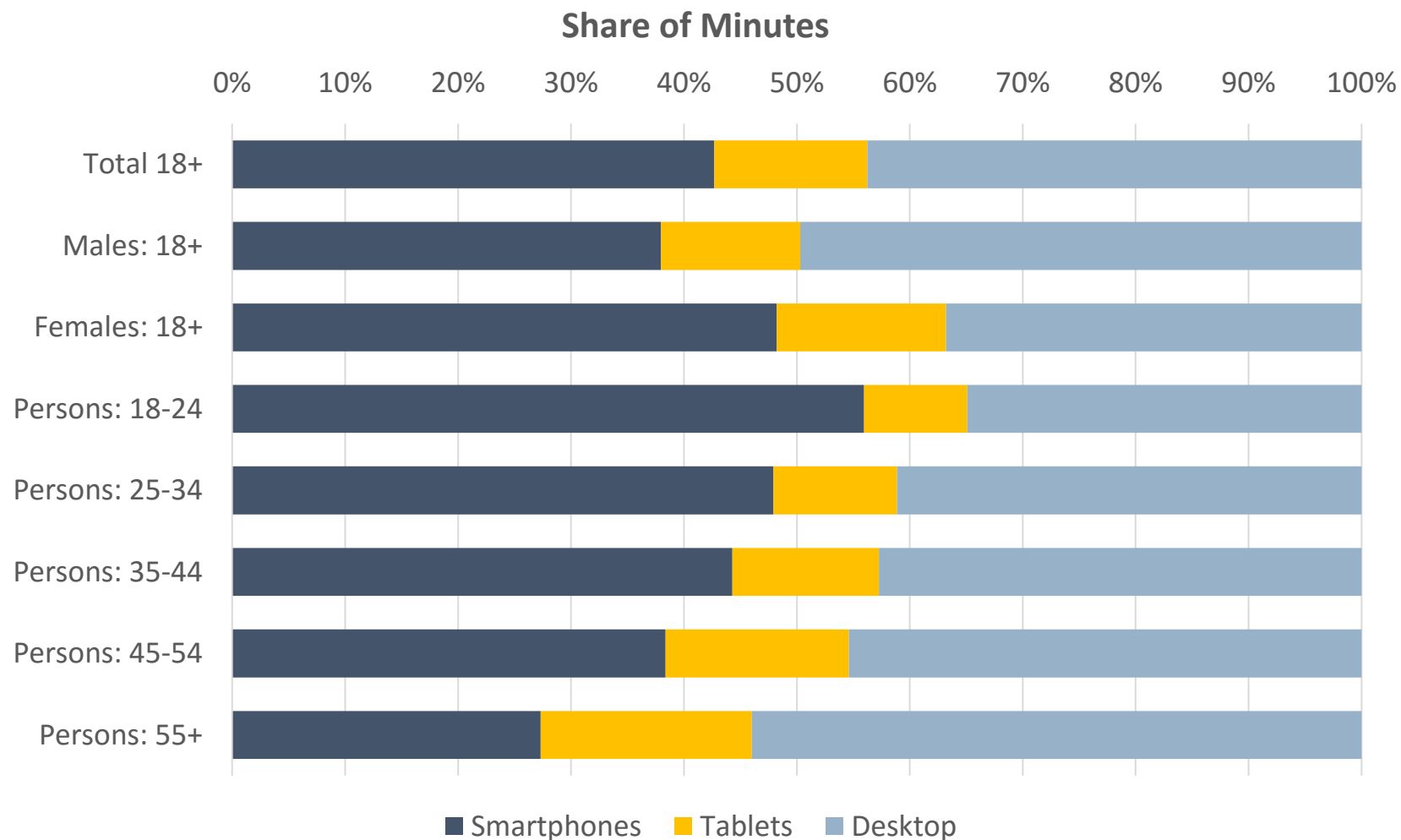


Source: comScore MMX Multi-Platform, Mar 2016, UK

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.

Platform Share of Minutes by Demographic

Millennials & Females spend the greatest share of their time on mobile devices



Females' spend a greater share of their time online on mobiles than males

18-24s spend two thirds of their time online on smartphones or tablets

55+ split their time evenly between PC & Mobile devices but have the greatest tablet share

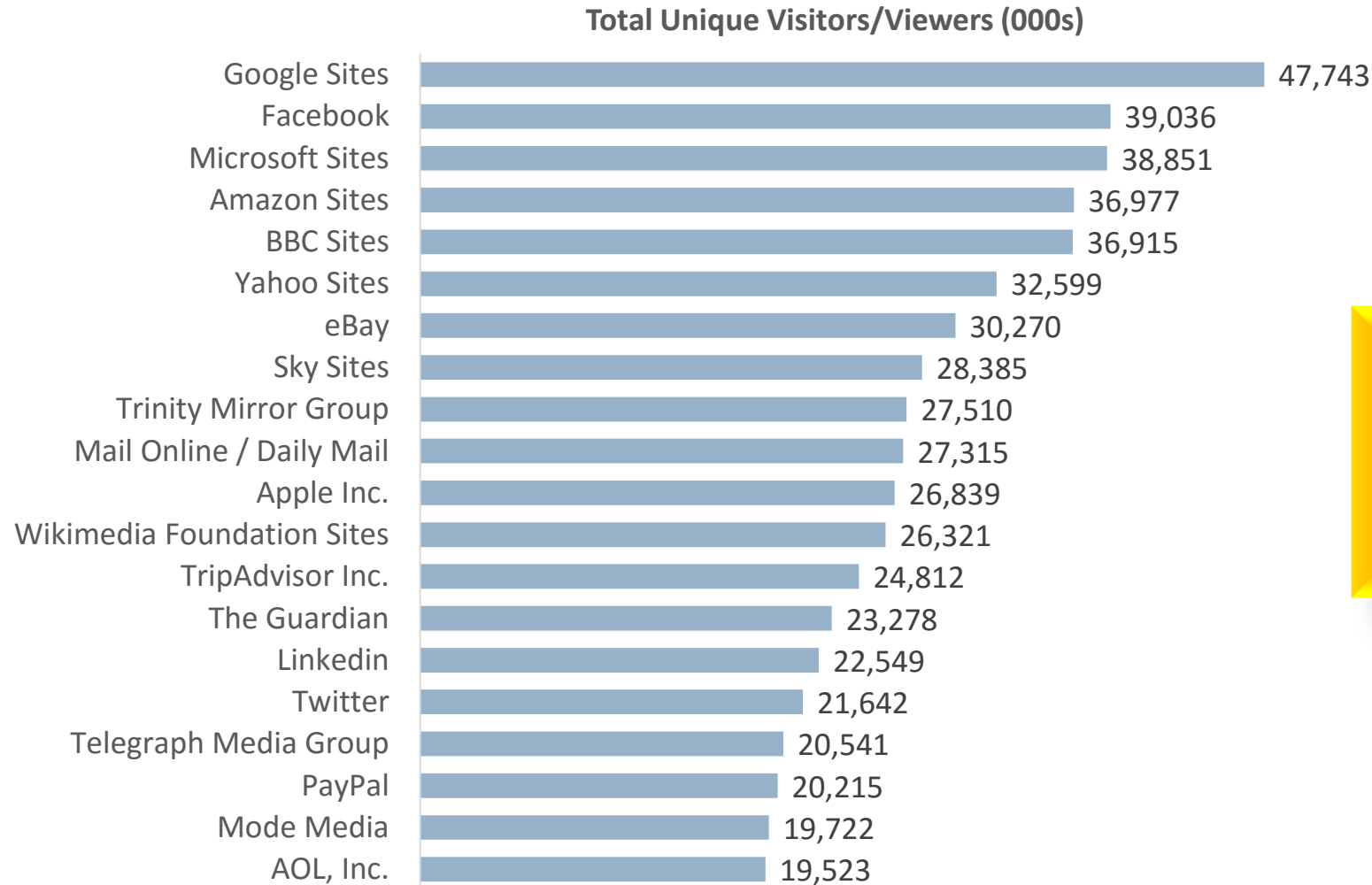
Source: comScore MMX Multi-Platform, Mar 2016, UK

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.

Top Properties – Total Digital Population

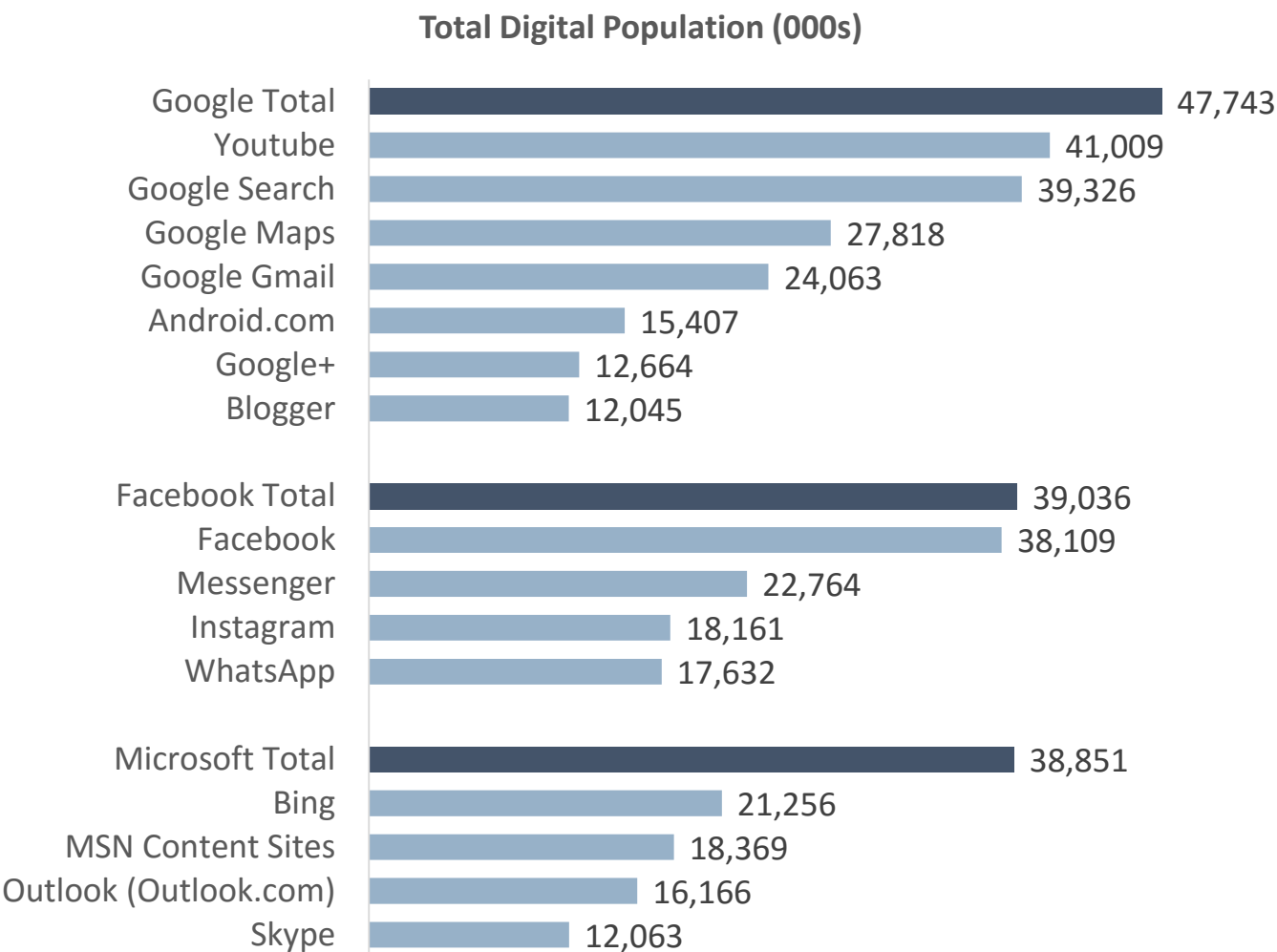
Top 20 Properties by 'Unique Visitors' - Digital Total Population (TDP)

97% of internet users visited a Google property in Mar 2016



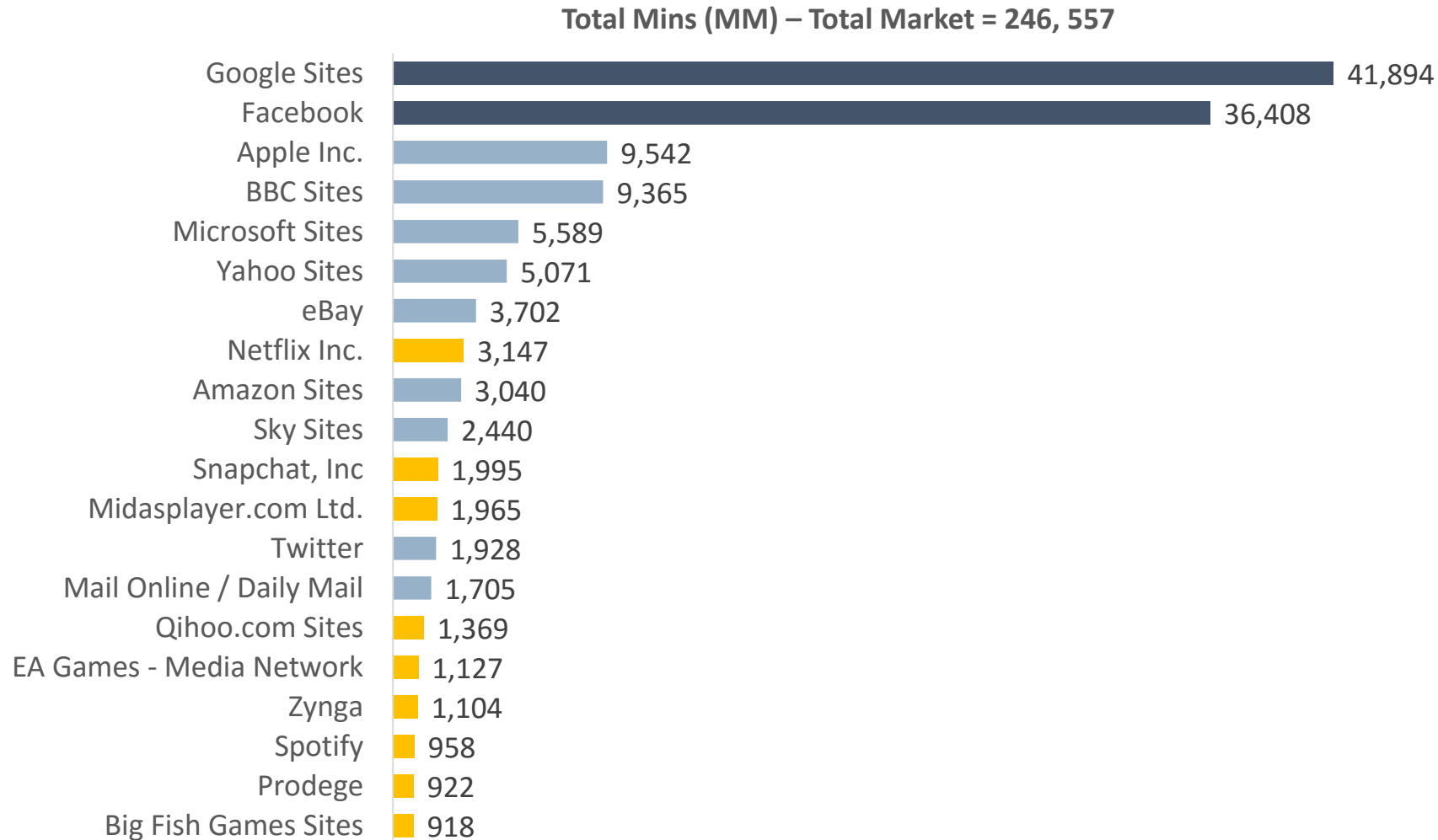
Total Digital
Population in
March 2016 was
50.2m

Audience Breakdown of Top 3 Sites



Top 20 Properties by 'Time Spent' - Digital Total Population (TDP)

Google & Facebook combined account for a third of all time spent online



Google (17%) and Facebook sites (15%) account for a third of all time spent online.

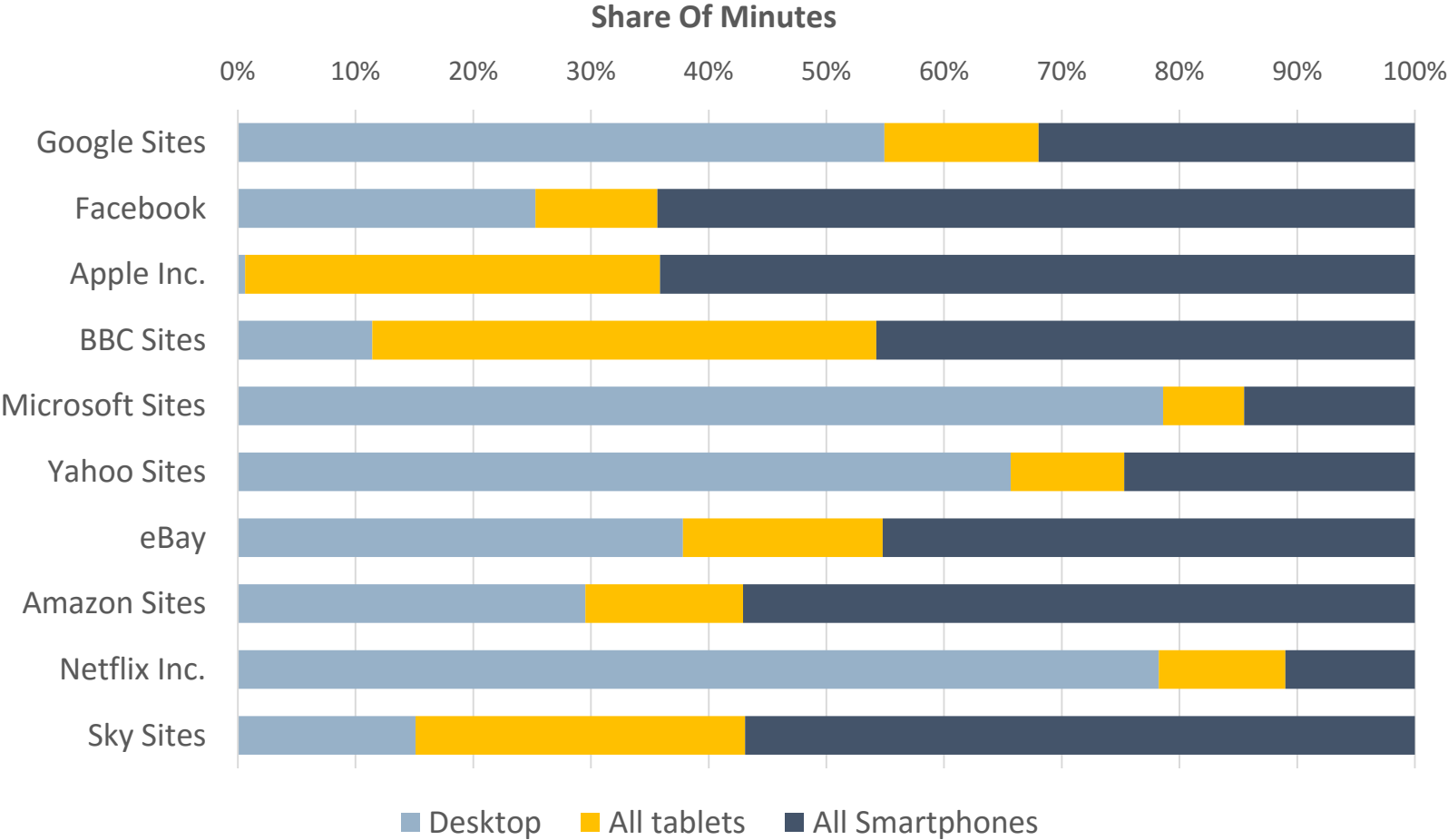
Only 10 properties have more than 1% share of minutes

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

Social Media & Entertainment categories drive minutes.

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

Smartphones account for nearly 2/3 of Facebook and Apple's Minutes



Apple has the greatest share of time on all mobile devices

BBC has the greatest share of time online on a tablet

Majority of times spent online for Microsoft, Yahoo & Netflix is on the desktop

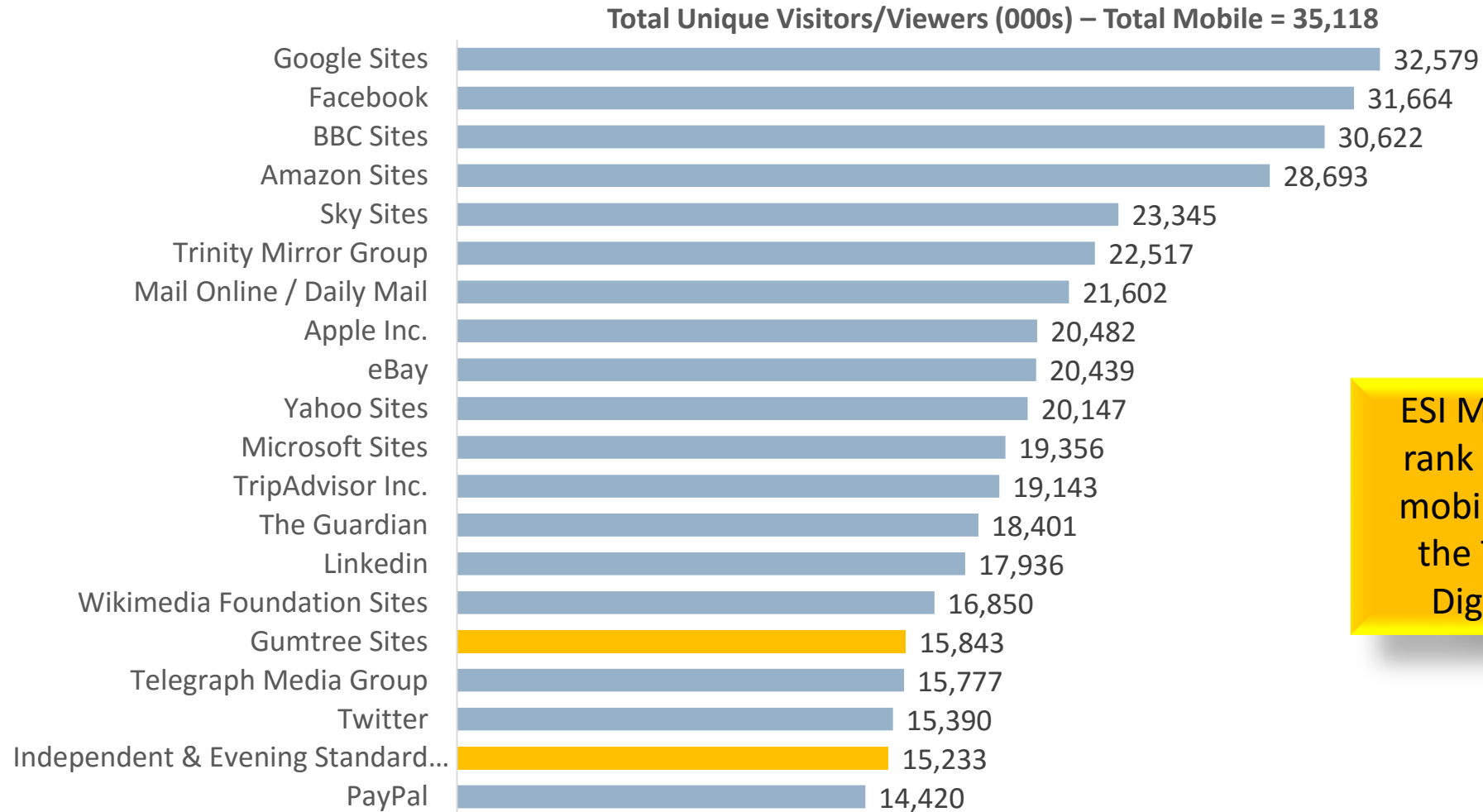
Source: comScore MMX Multi-Platform, Mar 2016, UK, Based on age 18+

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.

Top Properties – Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

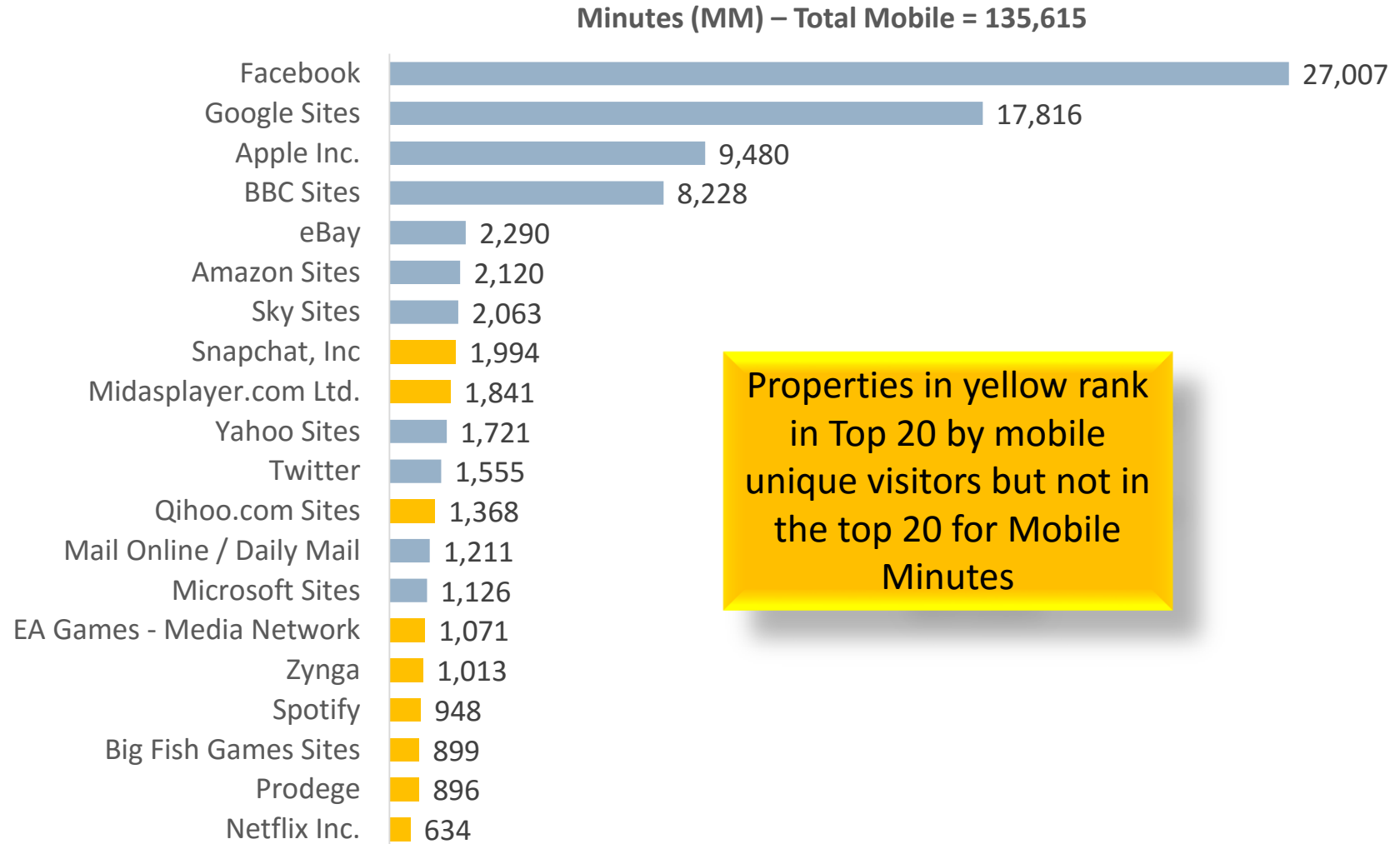
35.1m People Accessed Mobile Content in Mar 2016 (via Browser and App)



ESI Media & Gumtree rank in the top 20 for mobile UVs but not in the Top 20 for Total Digital Population

Top 20 Mobile Properties ranked by minutes

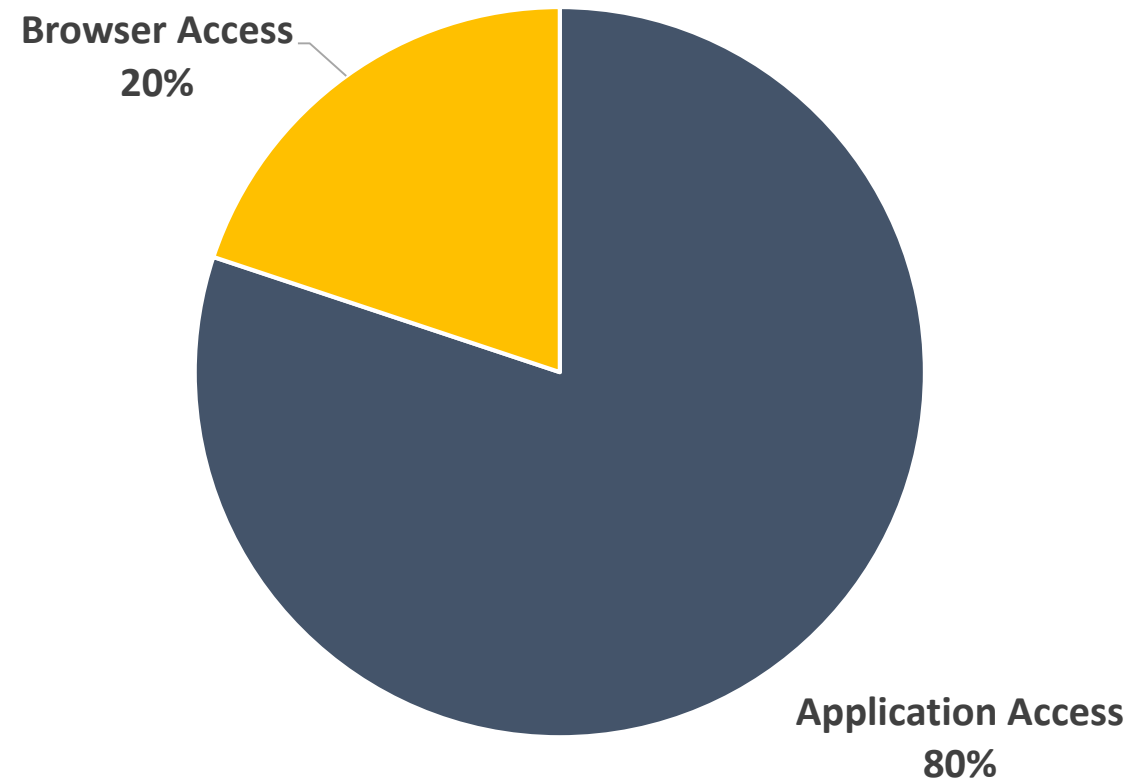
Games Sites more likely to feature in 'time online' Top 20



Share of Mobile Minutes by Access Type

4 in 5 mobile minutes come from applications

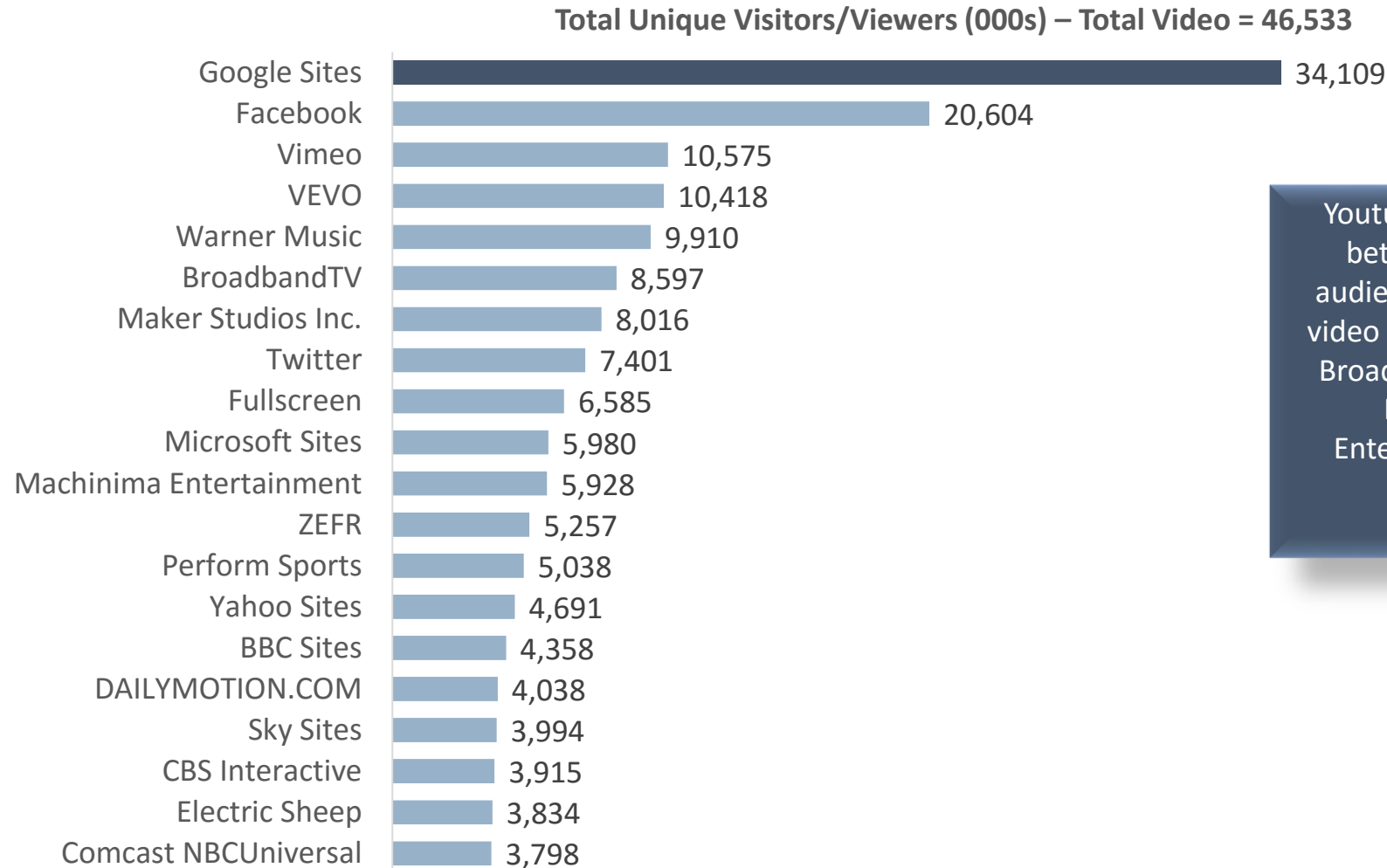
Share of Minutes by Platform



Top Properties – Video Viewers

Top 20 Video Properties Ranked by Unique Visitors

Video Viewers reached 46.5m in March 2016 – 72% watched videos on YouTube

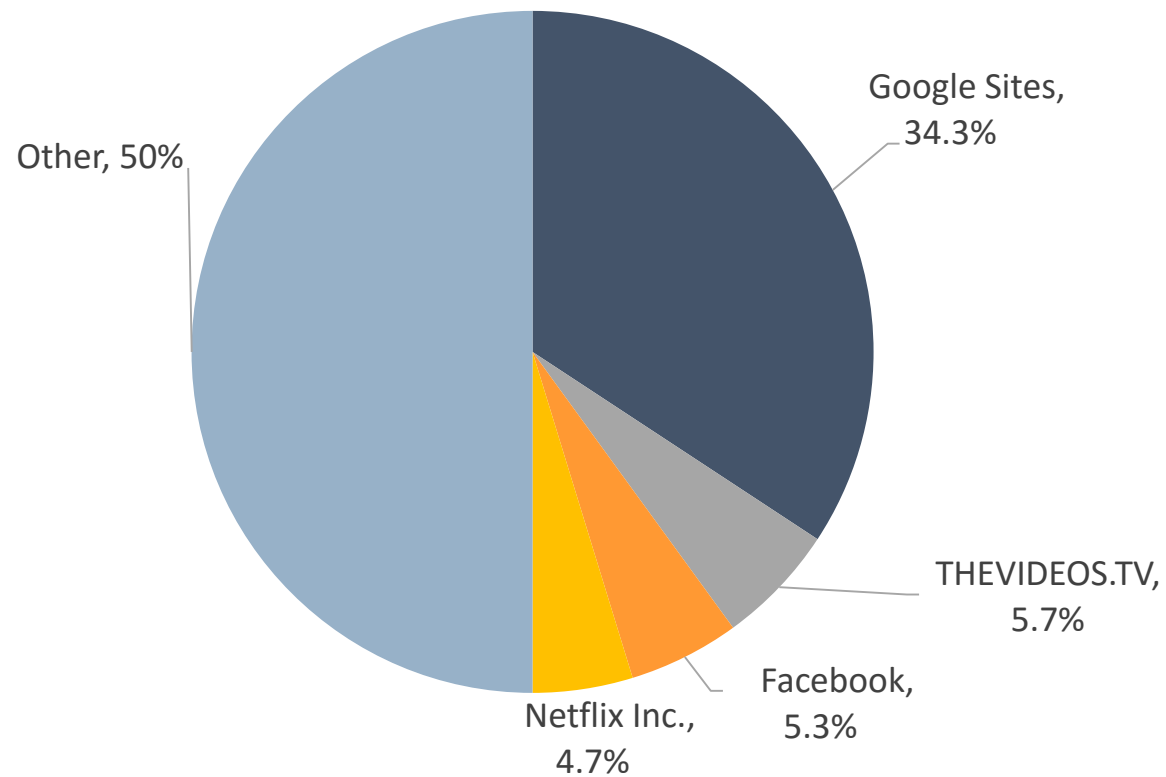


Youtube is the driving force between Google's video audience and by far the no.1 video site with 33.5m visitors. BroadbandTV, Vevo, Warner Music, Machinima Entertainment & ZEFR are Youtube Partners.

Top Video Properties by Share of Minutes

4 Properties account for 50% of all video minutes

Share of Video Minutes – Total Video Minutes = 51,183 MM

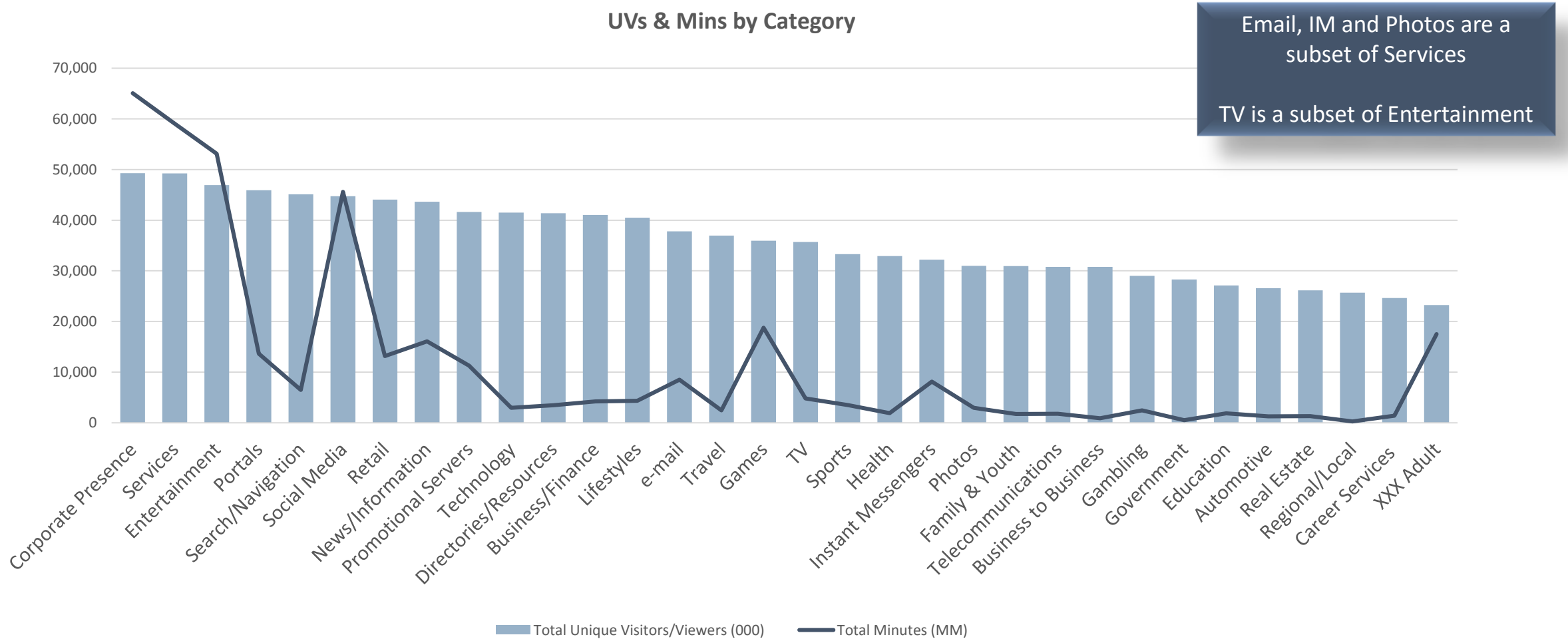


Youtube accounts for 33% of all video minutes

Top Categories

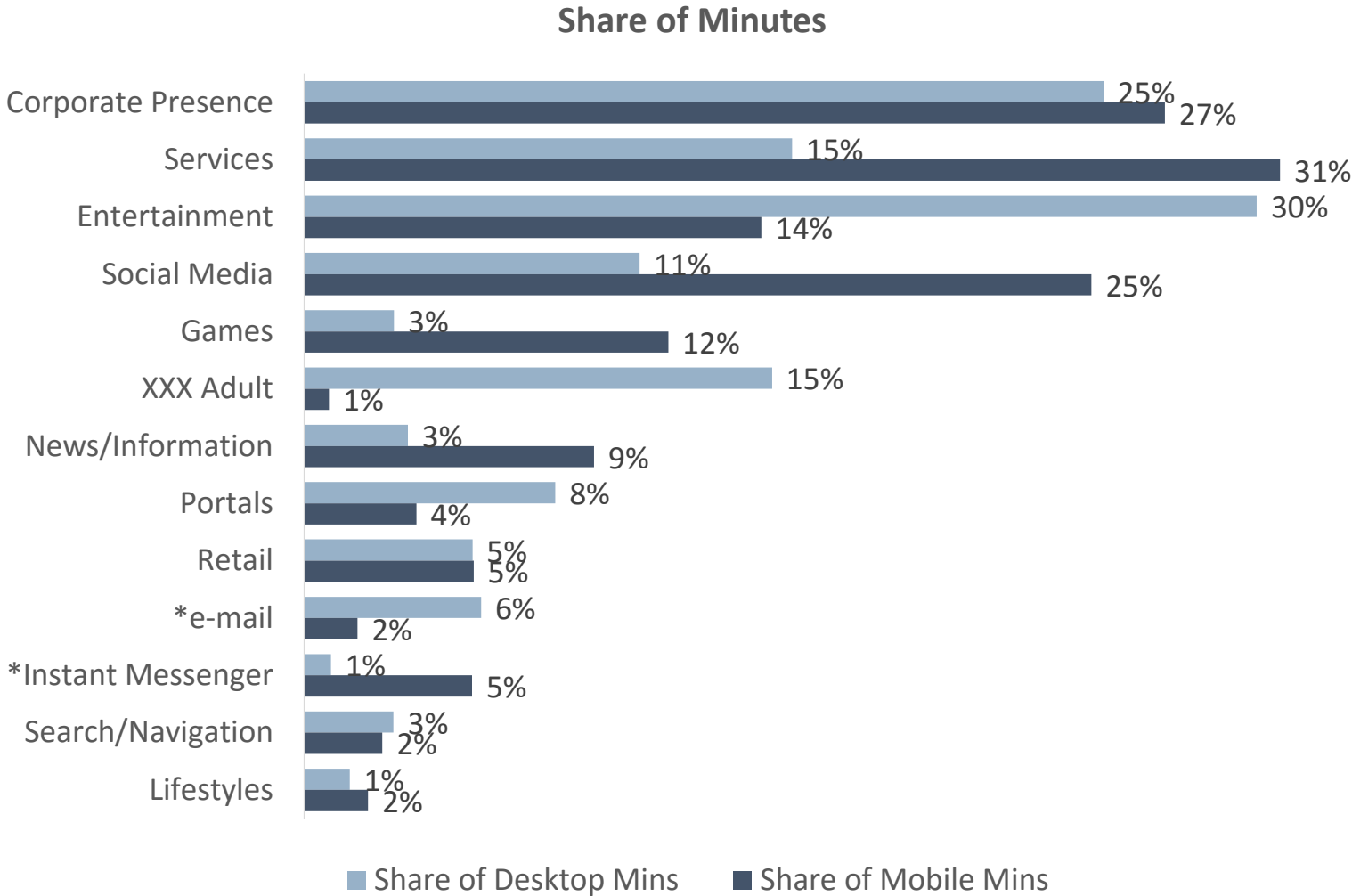
Major Categories Online – Unique Visitors v Minutes

Social Media, Gaming and Adult Sites have high levels of engagement



Share of Category Minutes by Platform

Social media's share of mobile/tablet time is more than double it's desktop share



Entertainment Share of Desktop Minutes (30%) is more than double it's share of Mobile/Tablet minutes (14%)

Social Media, Gaming & News have a greater share of minute on mobile devices than the desktop

Methodology

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

ABOUT COMSCORE

comScore, Inc. (NASDAQ: SCOR) is a global leader in digital measurement and analytics, delivering insights on web, mobile and TV consumer behaviour that enable clients to maximise the value of their digital investments.

A preferred source of digital audience measurement, comScore offers a variety of on-demand software and custom services within its four analytics pillars: Audience Analytics, Advertising Analytics and Digital Business Analytics. By leveraging a world-class technology infrastructure, the comScore Census Network™ (CCN) captures trillions of digital interactions a month to power big data analytics on a global scale for its more than 2,000 clients, which include leading companies such as AOL, Baidu, BBC, eBay, Facebook, Google, IBM, Intel, LinkedIn, Microsoft, Nestle, Starcom, Terra Networks, Universal McCann, Verizon, ViaMichelin and Yahoo!.



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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: <http://www.ukom.uk.net/>





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

For questions about comScore's products & services please contact: mshaw@comScore.com