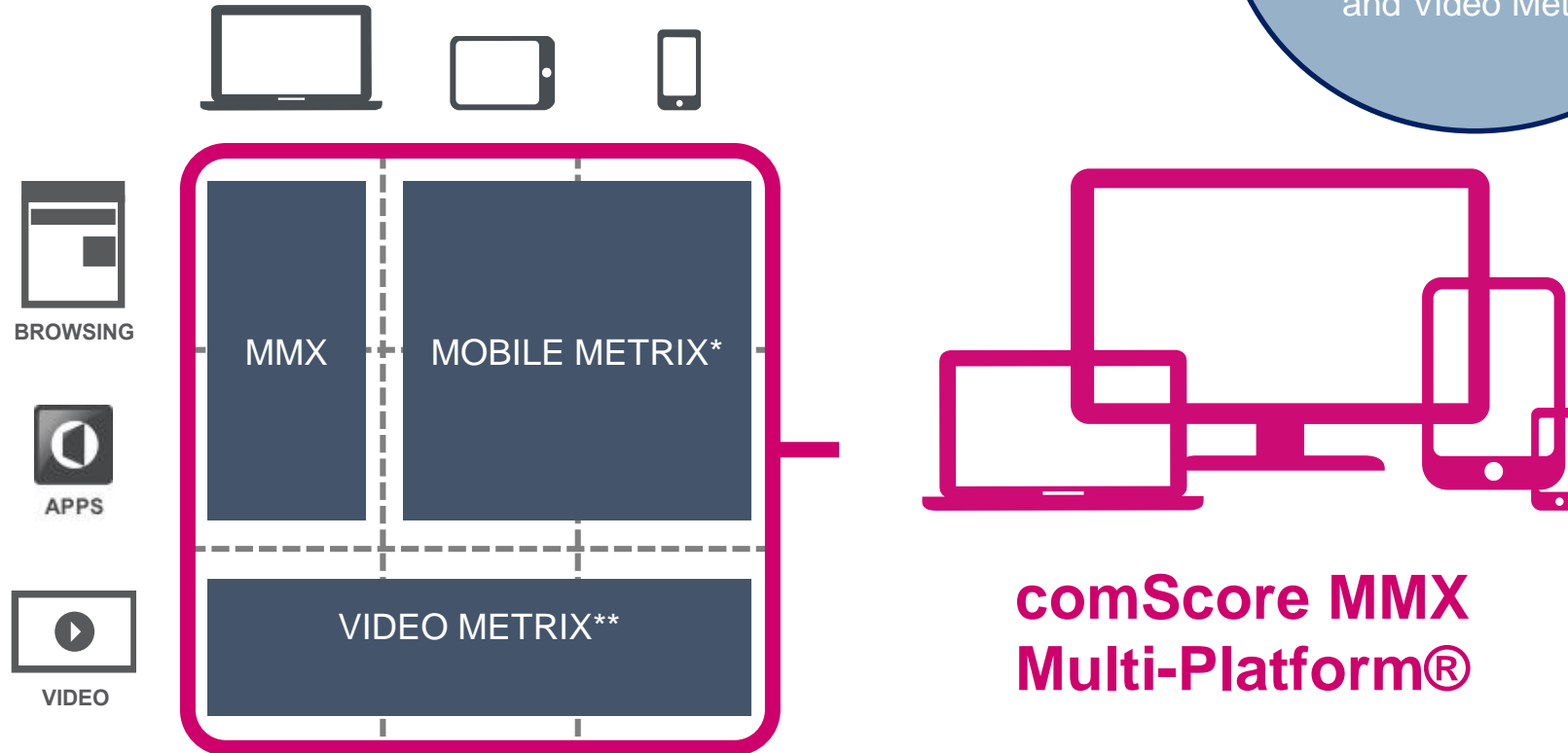


# UK Digital Market Overview – June 2016

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

# A Guide to Data Sources

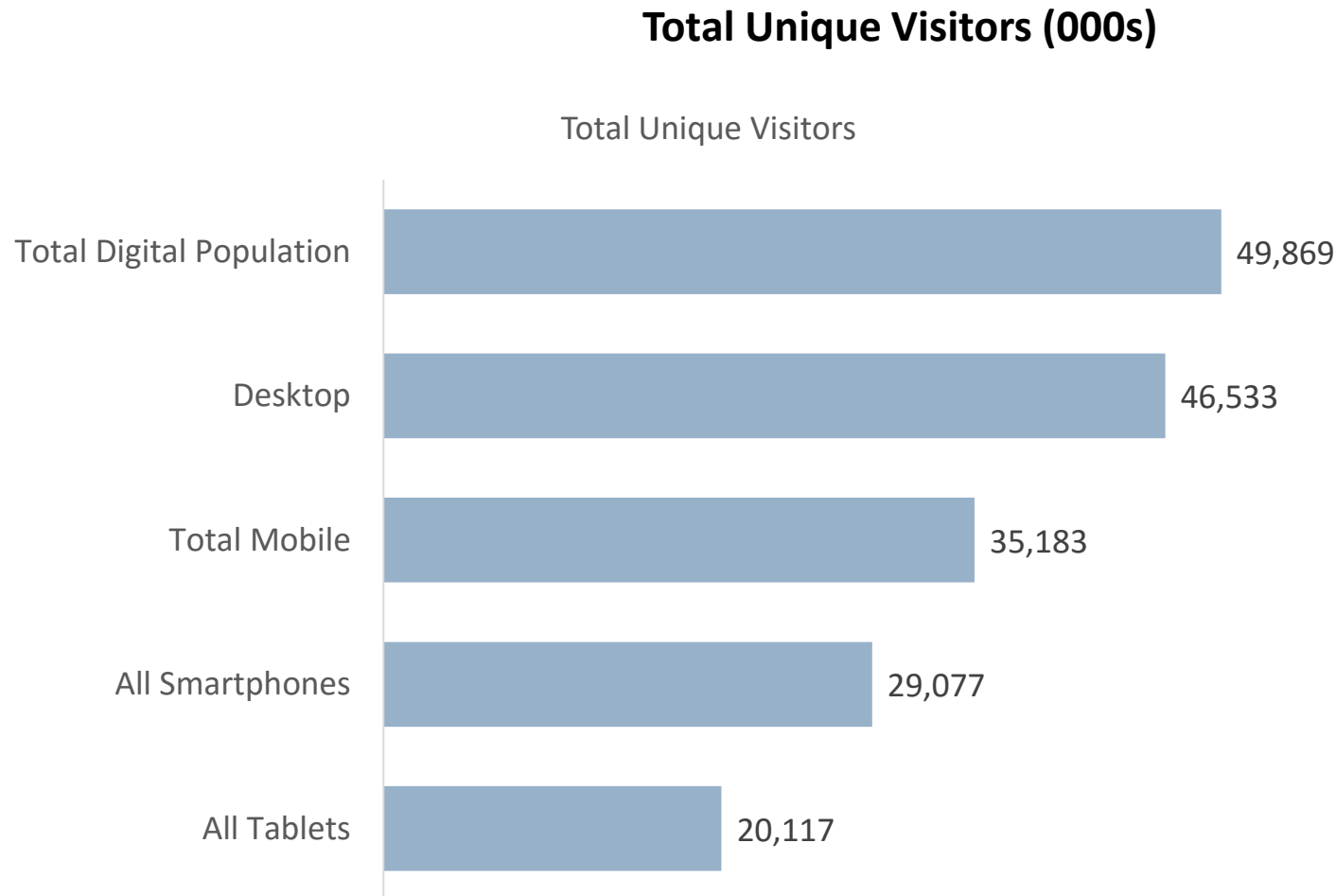
Total Digital  
Population =  
Unduplicated  
audience across  
MMX, Mobile Metrix  
and Video Metrix



# Multi-Platform Usage

# Breakdown of Digital – Unique Visitors by Platform

Total Digital Population across desktop & mobile devices was 49.9m in Jun 2016



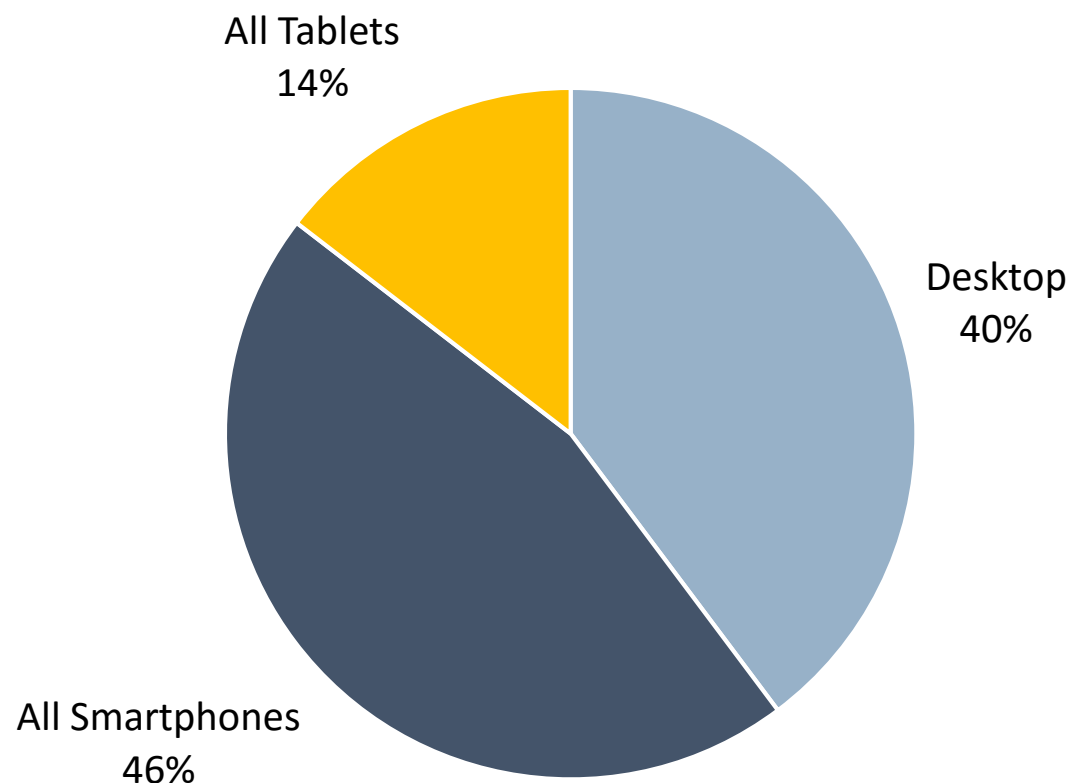
35.2m UK adults used a mobile device to access the internet in Jun 2016

3.3m of these did not use a desktop/laptop to access the internet

# Share of Minutes by Platform (Total Digital Population)

60% of adults' time online is now spent on mobile devices

Share of Minutes by Platform (18+)



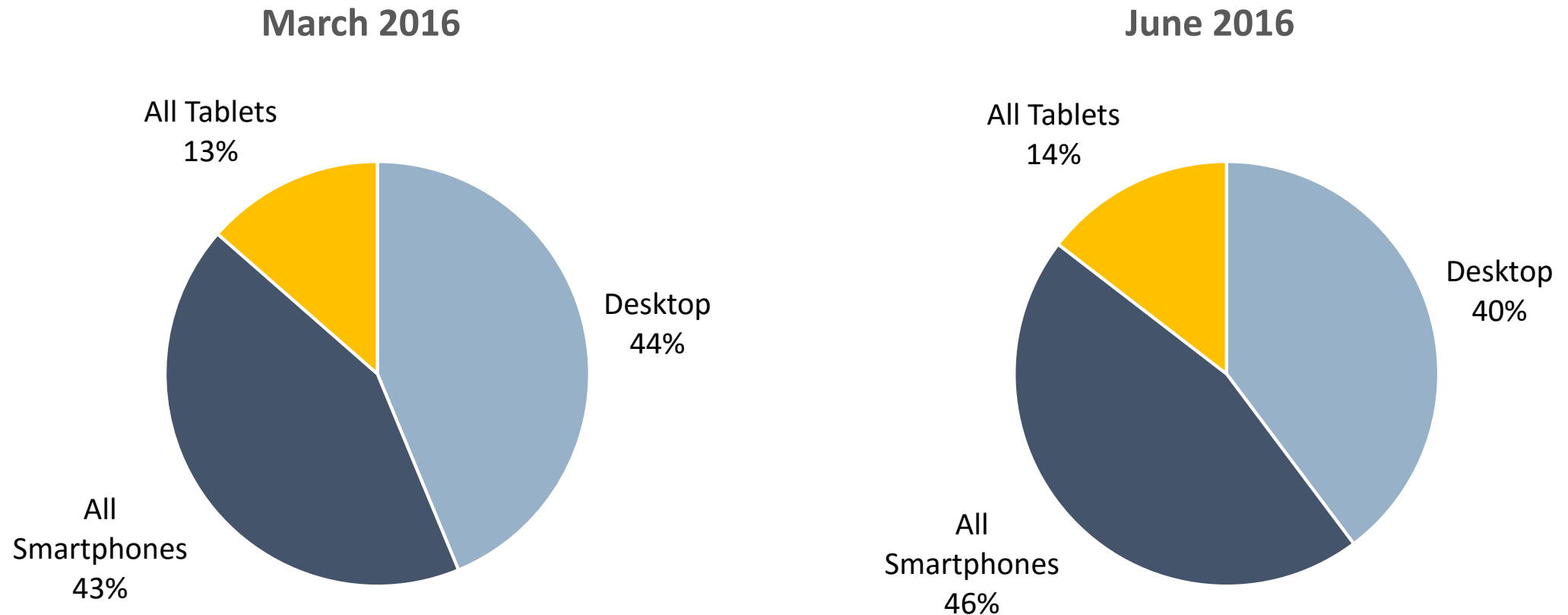
Source: comScore MMX Multi-Platform, June 2016, UK

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.

# Change in Share of Minutes by Platform March to June 2016

## Smartphone overtakes desktop for share of minutes among adults

### Share of Minutes by Platform (18+)

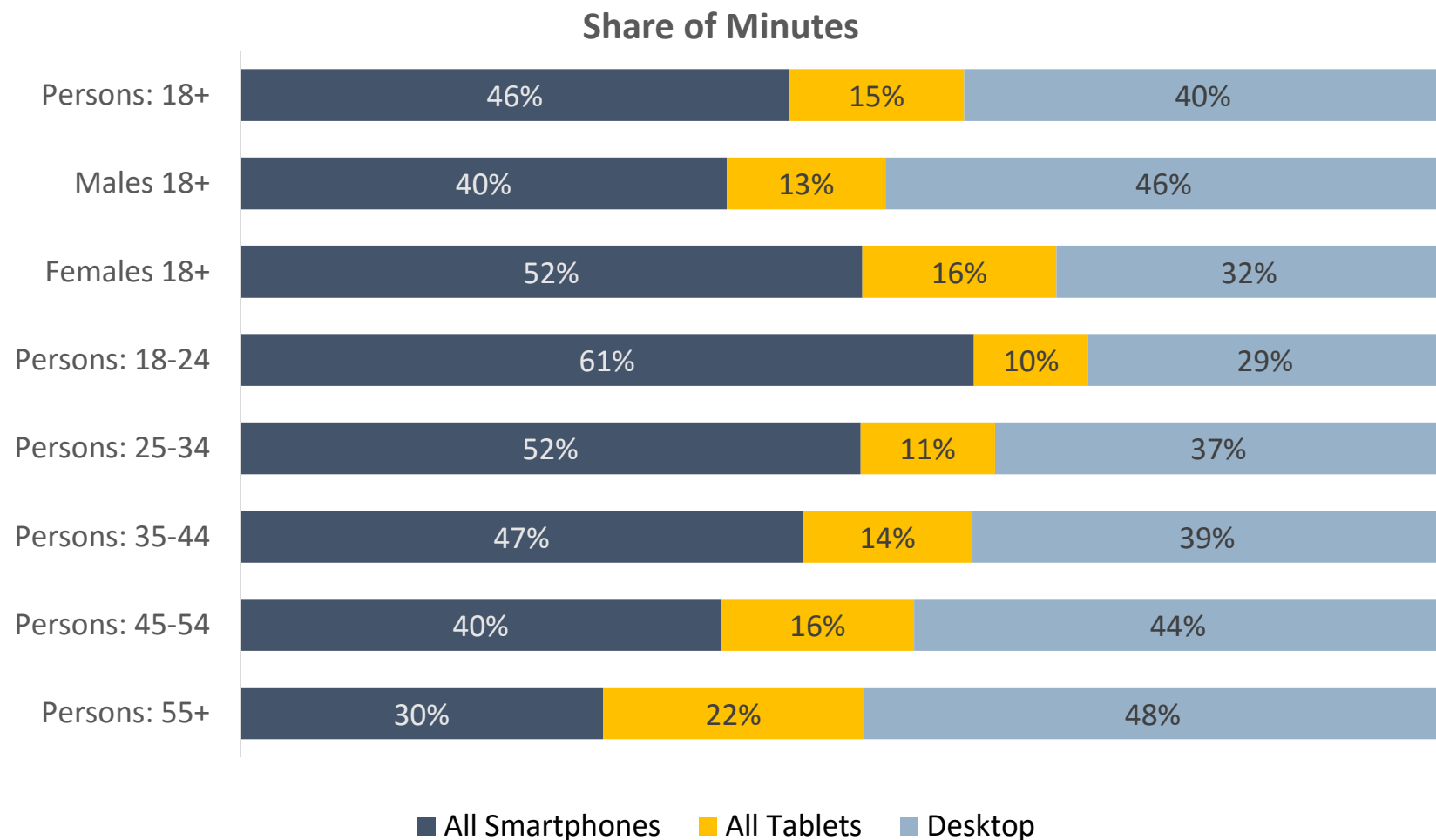


Source: comScore MMX Multi-Platform, June 2016, UK

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 18+ spend 68% of their time online on mobile devices compared to only 53% for males. The smartphone takes the lion's share of minutes for females 18+.

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

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

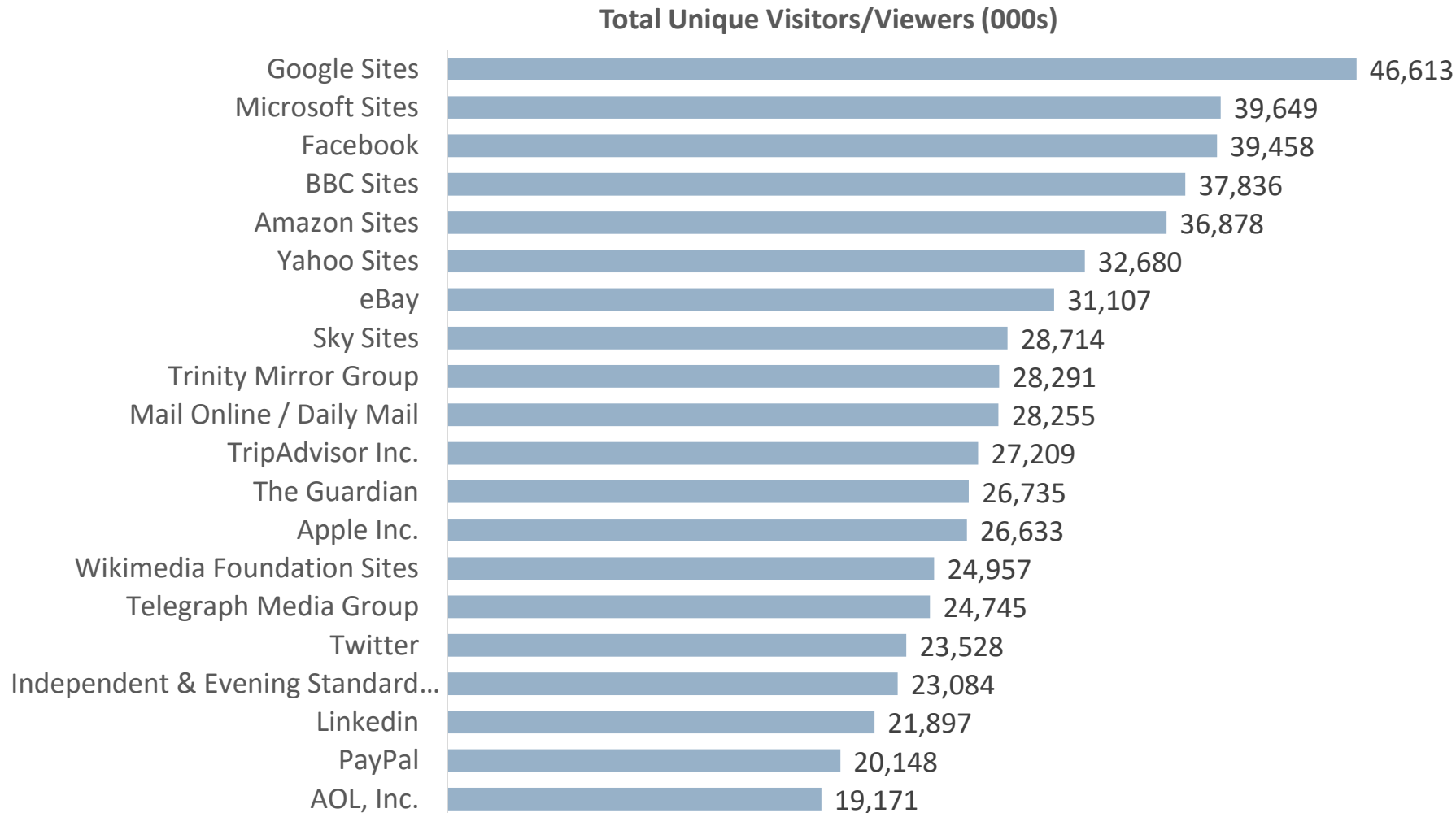
MMX Multi-Platform includes Desktop browsing, Desktop video streams, smartphone browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps.

# Top Properties – Total Digital Population



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

## Microsoft edges ahead of Facebook due to strong Bing Growth



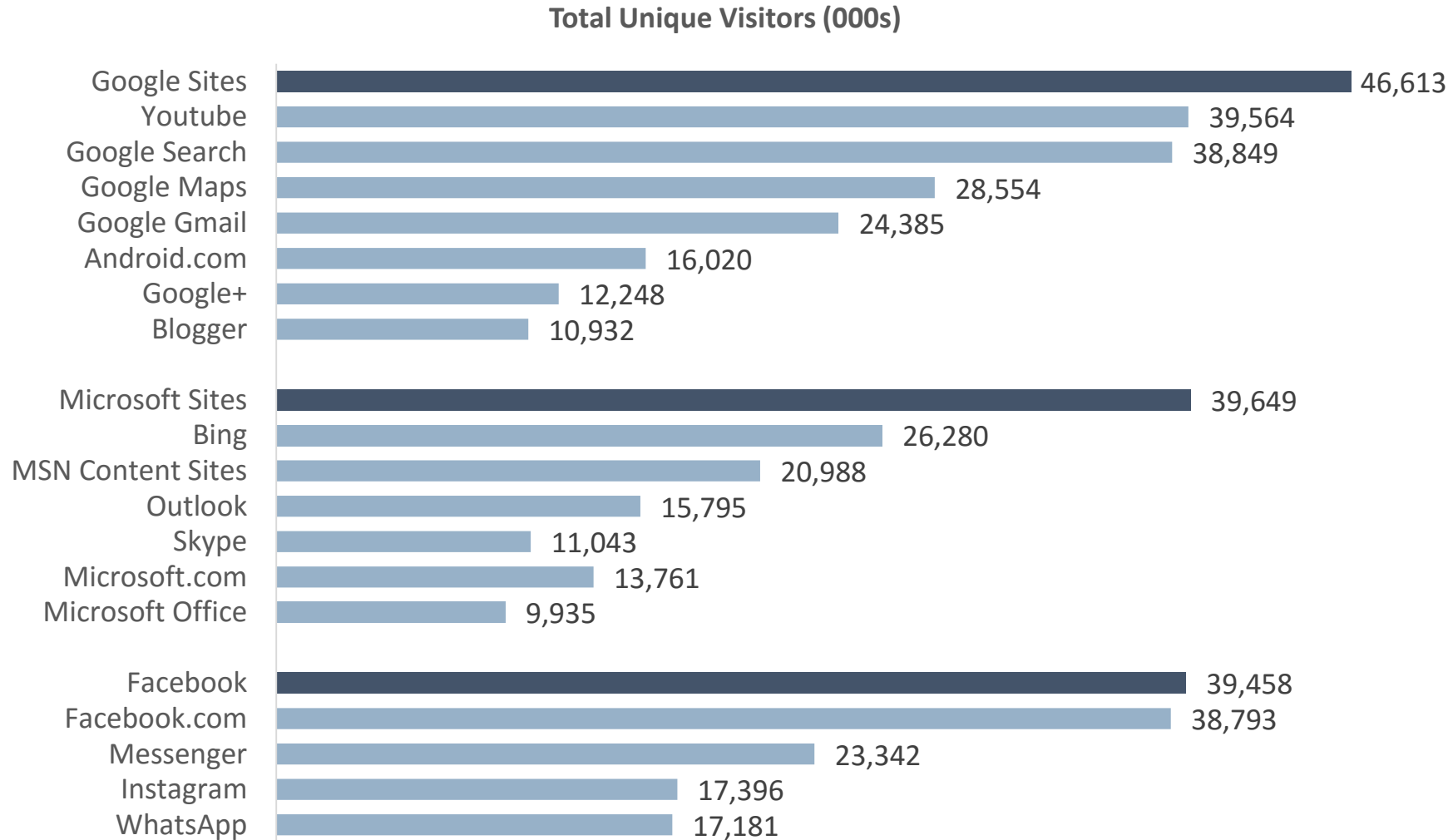
The top 4 all have an online reach of over 75%. Google is still no.1 with over 93% of internet users visiting one of its properties in June 2016.

The AOL & Microsoft display advertising sales partnership gives AOL a combined audience of 36.7m or 74% reach in June

ESi Media enters top 20 in June

# Audience Breakdown of Top 3 Sites

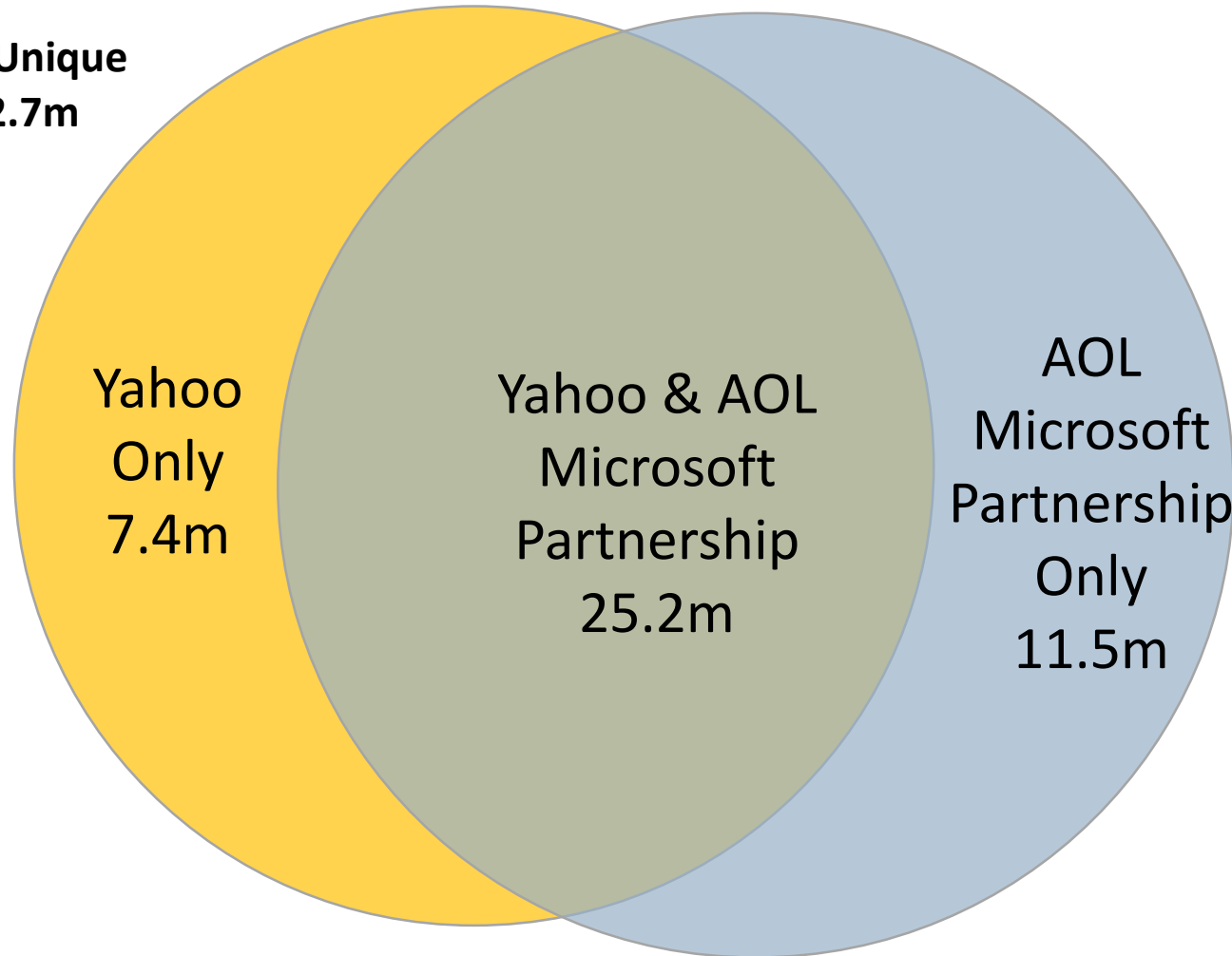
Bing's audience Increased by over 4 million between March and June 2016



# What impact could adding Yahoo have on the audience of the existing AOL/Microsoft Ad Partnership if the Verizon deal goes through?

**Yahoo Online Unique  
Visitors = 32.7m**

**AOL Microsoft  
Partnership\* - Unique  
Visitors = 36.7m**

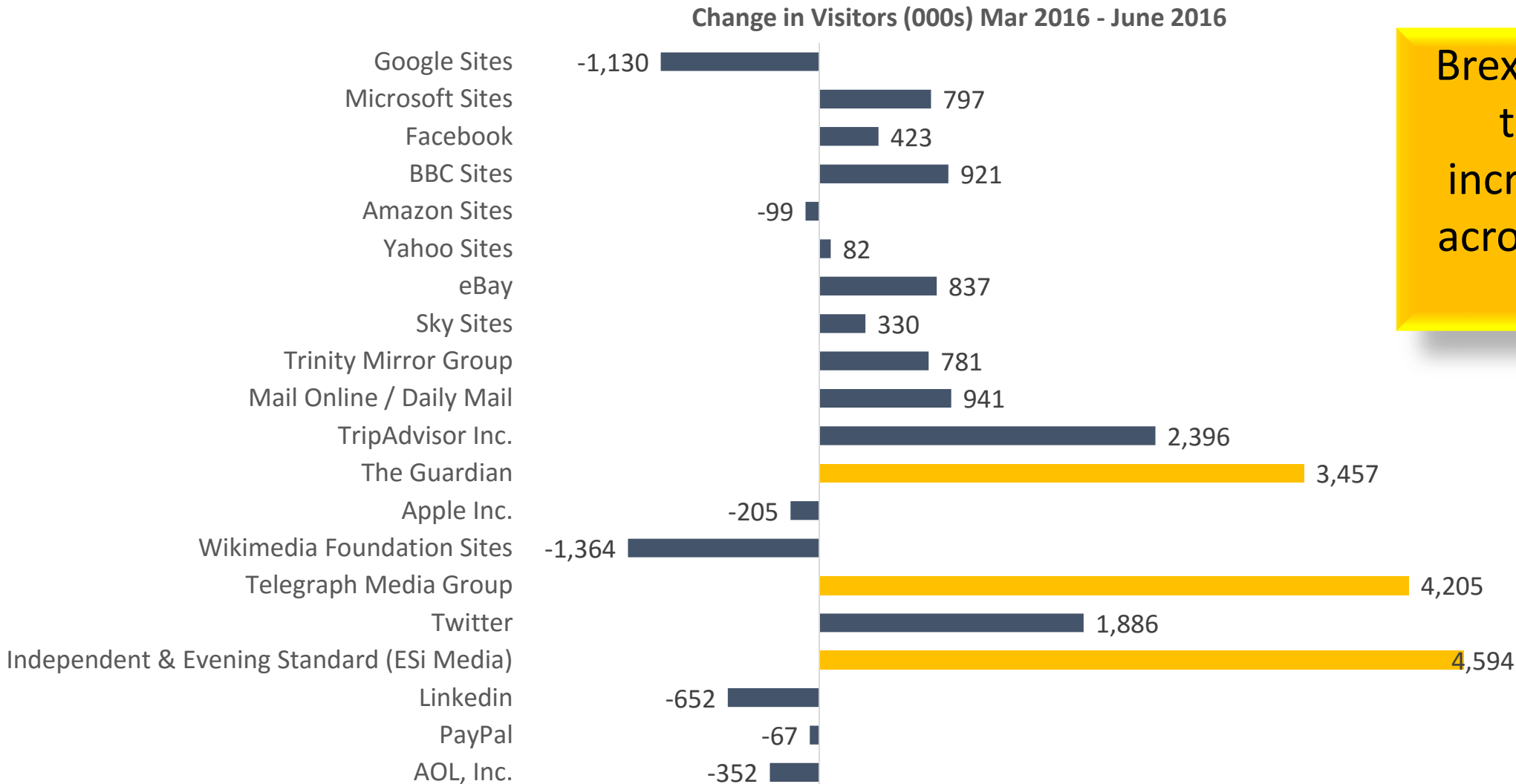


**Total Combined  
Audience would  
have been 44.2m in  
June 2016 making it  
2<sup>nd</sup> only to Google**

\*AOL Microsoft Partnership = AOL  
Inc (parent) + MSN, Skype and  
Outlook.

# Key Unique Visitor Changes Mar-June 2016: Top 20 Properties

## ESi Media, Telegraph & The Guardian added highest number of visitors

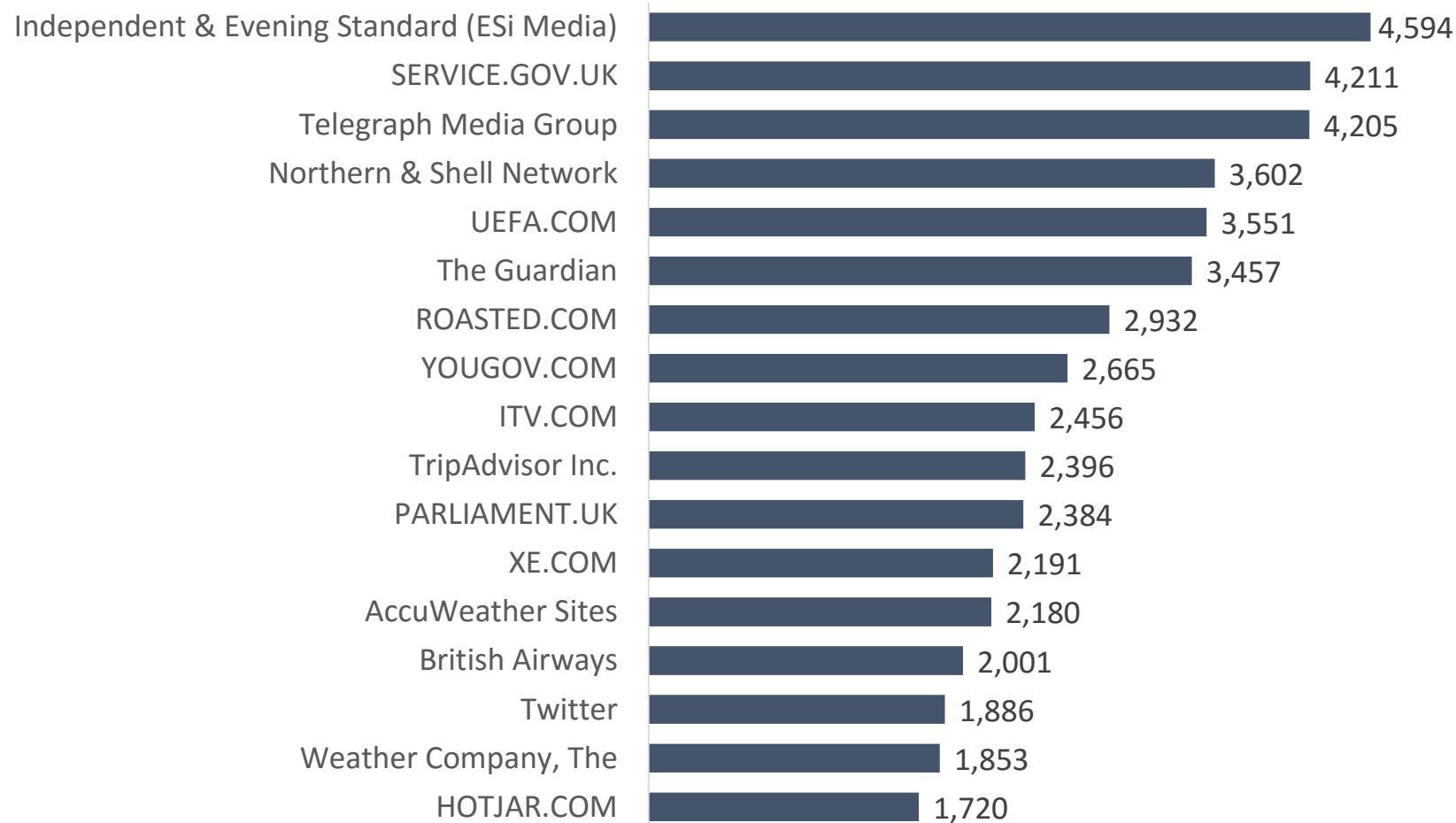


Brexit contributed to the huge increases in June across newspaper sites

# Which properties added most Unique Visitors between March and June 2016?

## Newspapers, UEFA, Weather and Government sites benefitted most

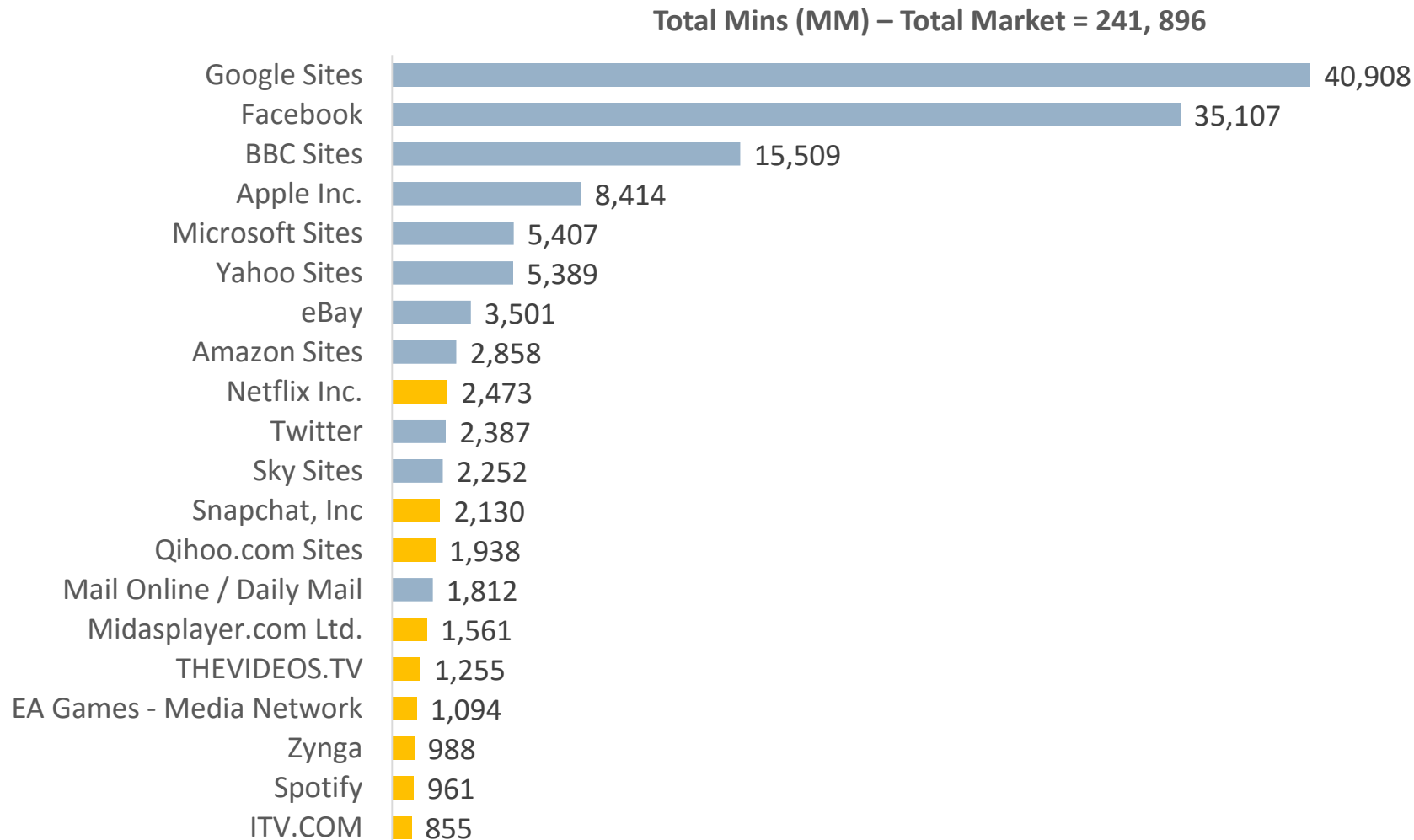
Additional Unique Visitors June 2016 v March 2016 (000s)



Brexit contributed to the huge increases in June for Government & newspaper sites

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

BBC's strong performance since March has moved it ahead of Apple



Google (17%) and Facebook sites (15%) account for 31% of all time online

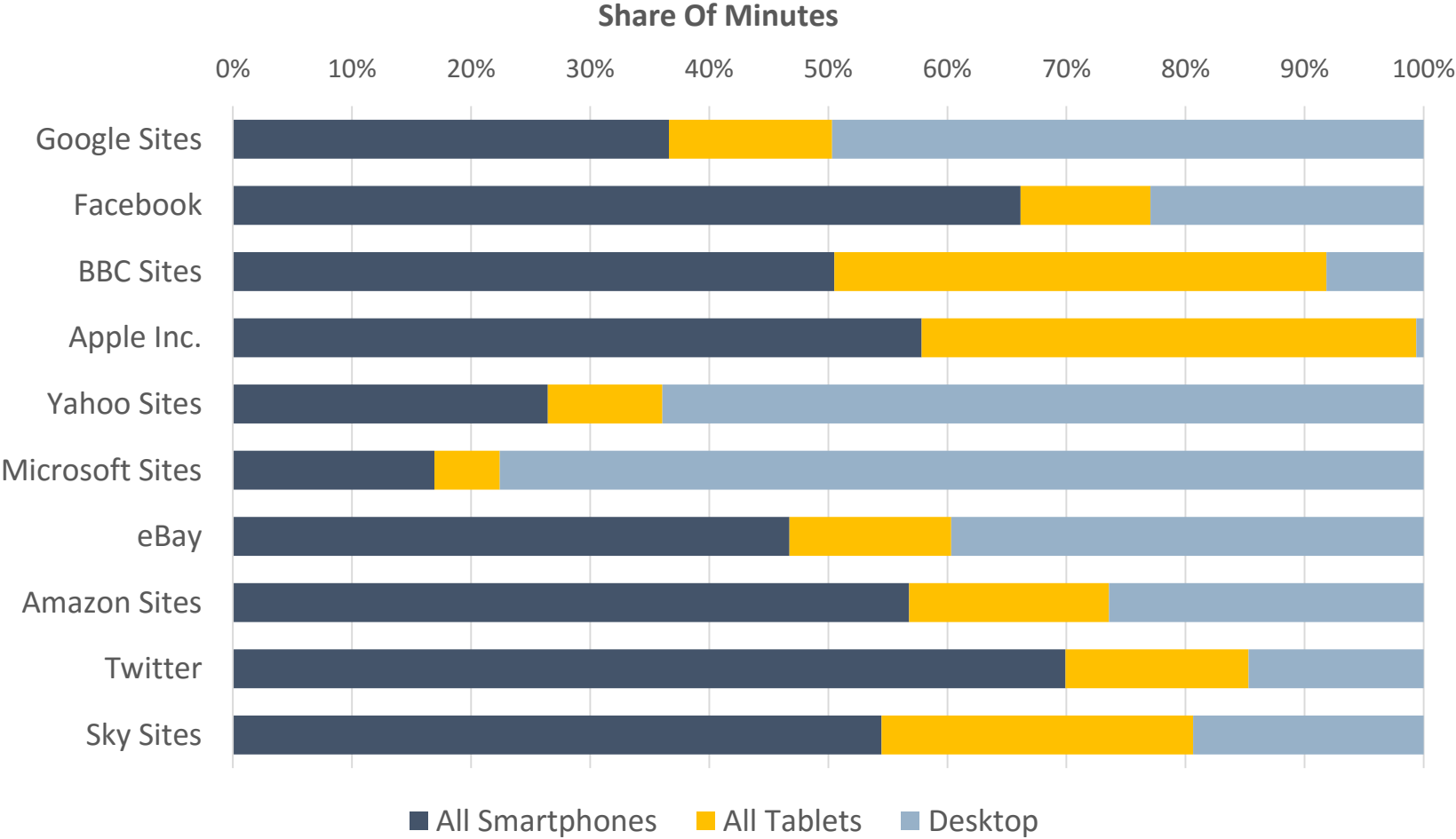
BBC mins increased from 9.3bn in March to 15.5 between March and June

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

## Facebook & Twitter have the highest smartphone share



Apple has the greatest share of time on all mobile devices

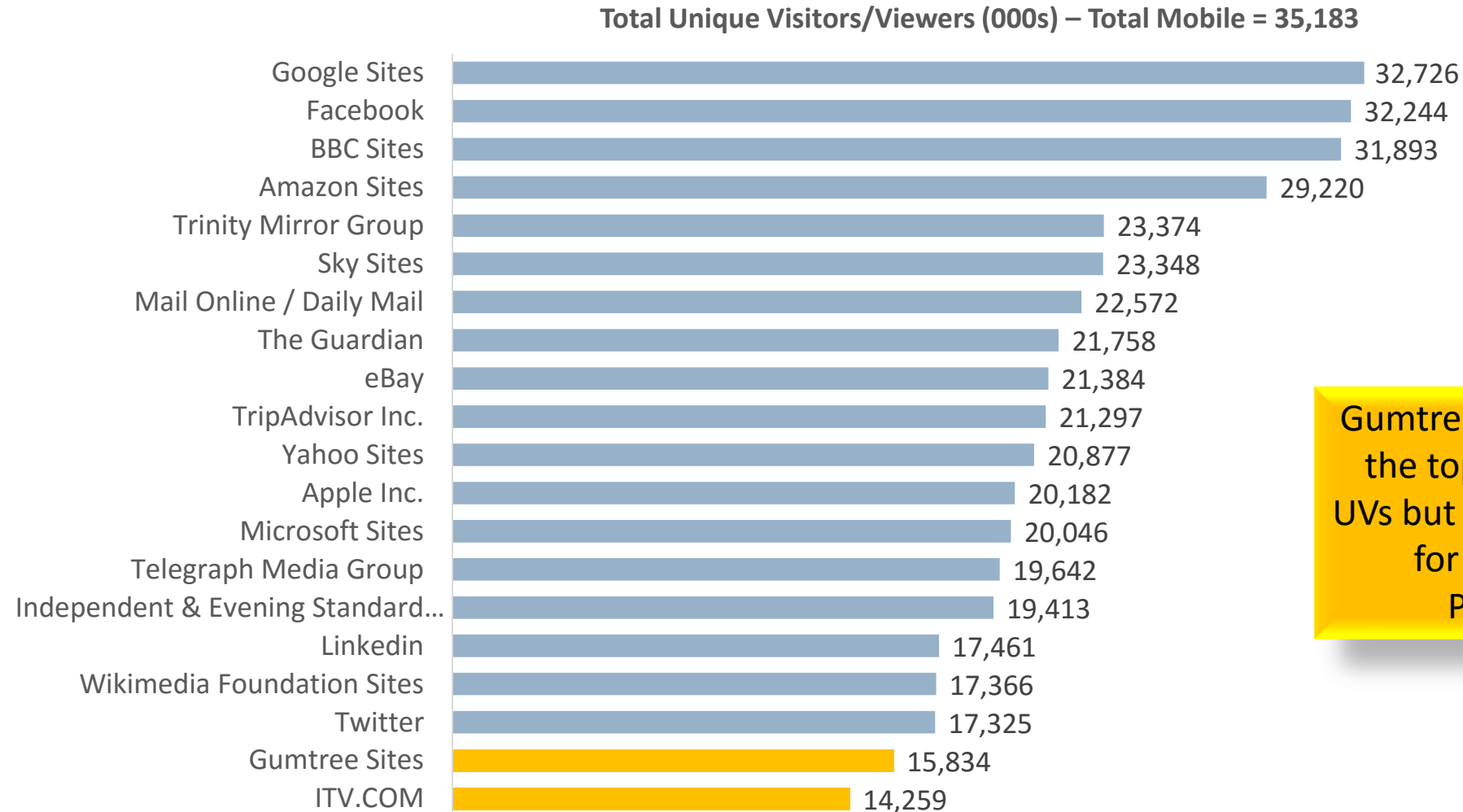
Majority of time spent online for Microsoft & Yahoo is on the desktop

# Top Properties – Mobile Population



# Top 20 Mobile Properties ranked by Unique Visitors

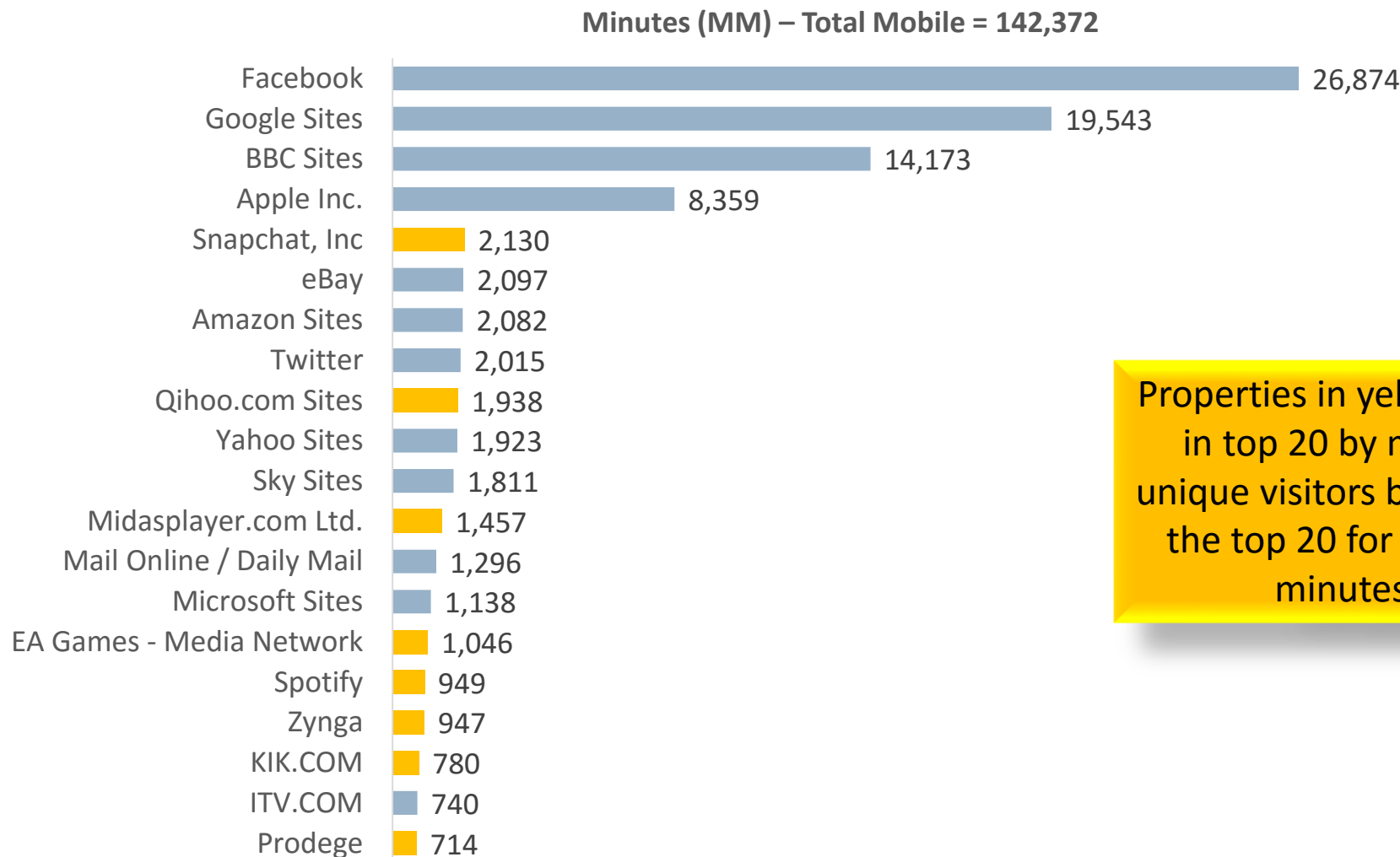
35.2m adults accessed mobile content in June 2016 (via browser and app)



Gumtree and ITV 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

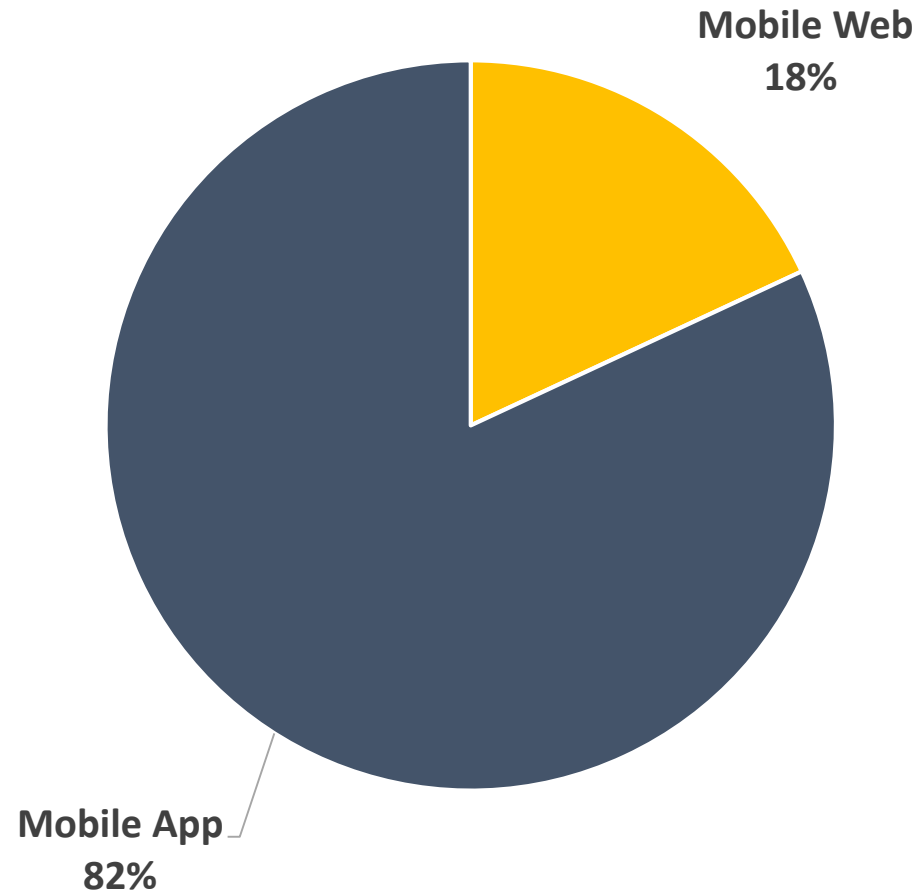


Properties in yellow rank in top 20 by mobile unique visitors but not in the top 20 for mobile minutes

# Share of Mobile Minutes by Access Type

4 in 5 mobile minutes come from applications

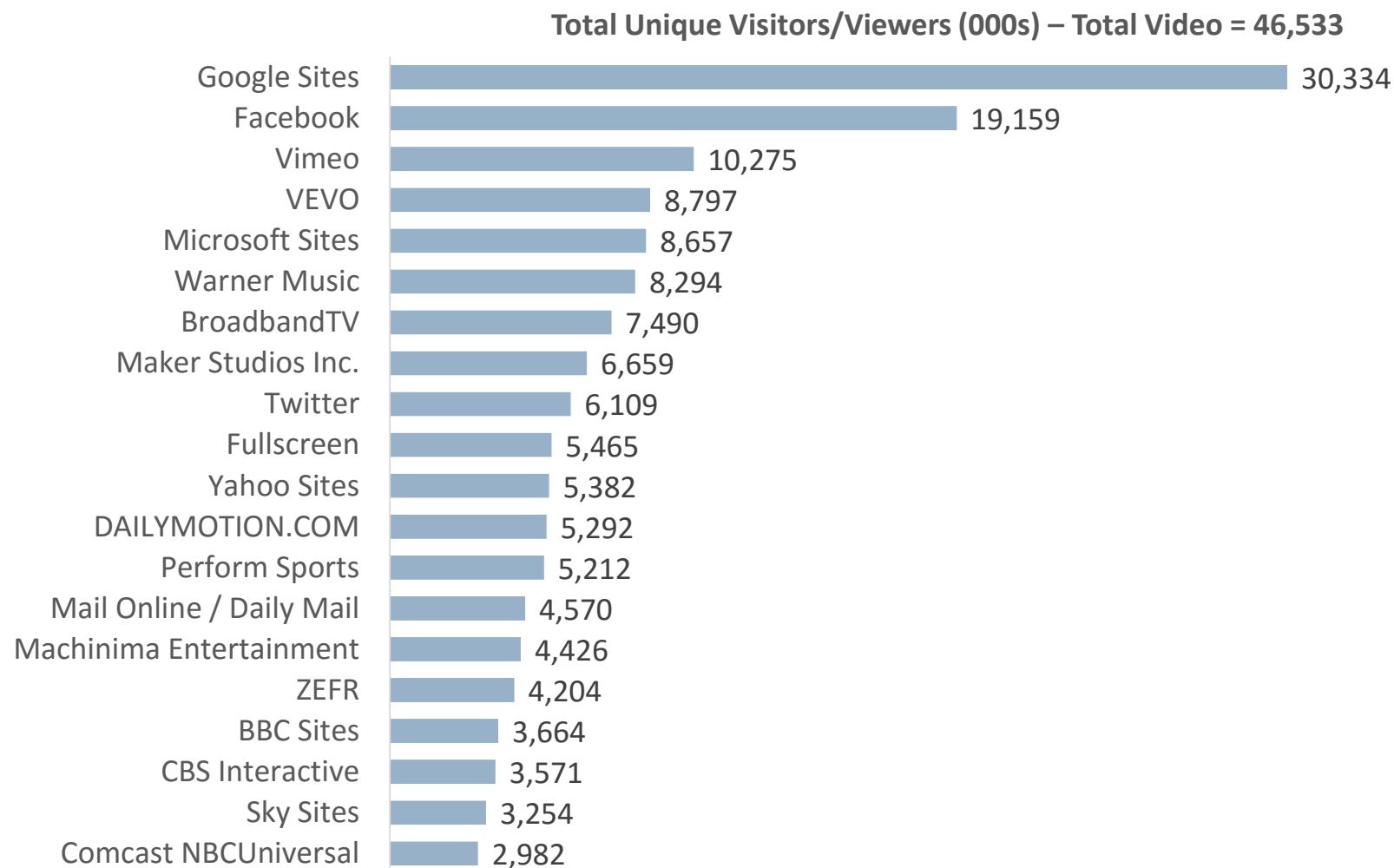
Share of Minutes by Platform



# Top Properties – Video Viewers

# Top 20 Video Properties Ranked by Unique Visitors/Viewers (desktop only)

Mail Online now in top 15 after adding 1.2m viewers in June



YouTube dominates the top 20 as BroadbandTV, Vevo, Warner Music, Machinima Entertainment & ZEFR are all Youtube Partners.

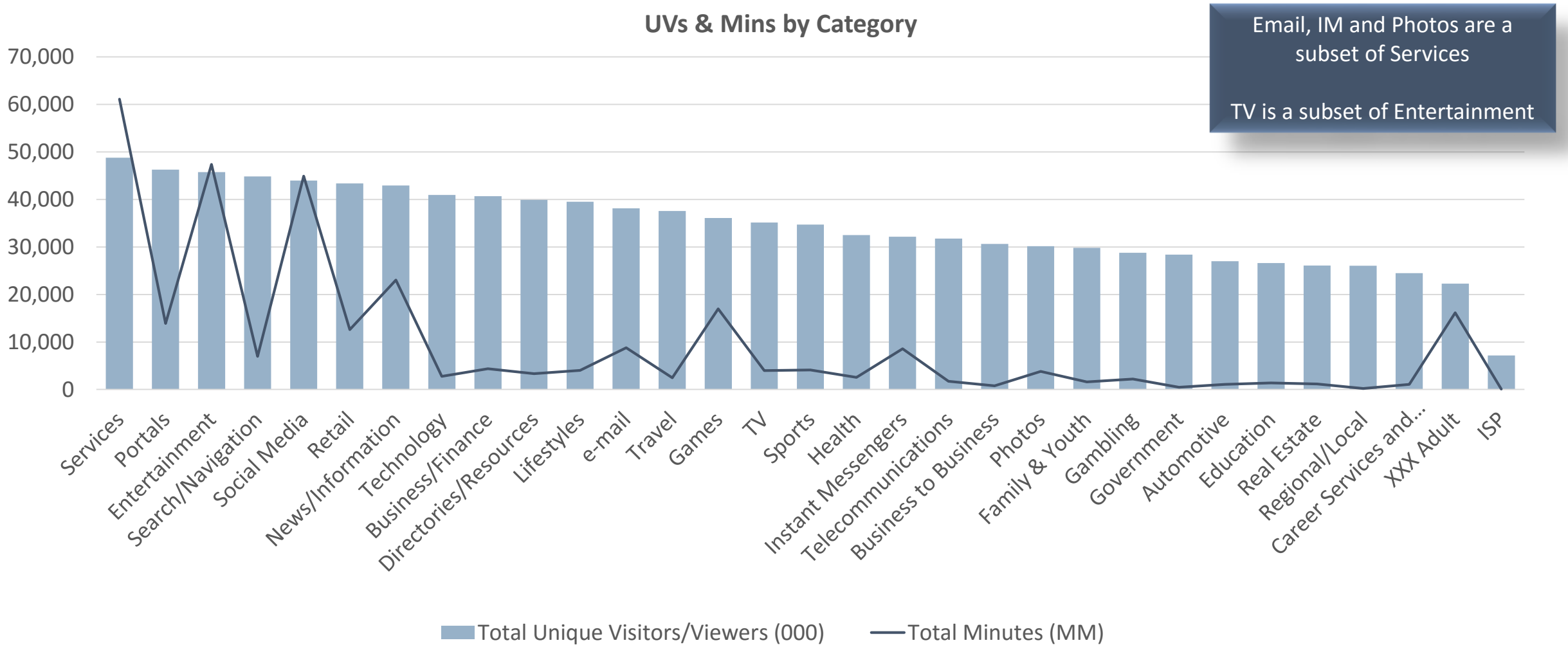
Mail Online enters top 15 in June 2016 after adding 1.2m Viewers

MSN adds 2.5m viewers since March, helping Microsoft move from 10<sup>th</sup> position to 5<sup>th</sup> in June

# Categories

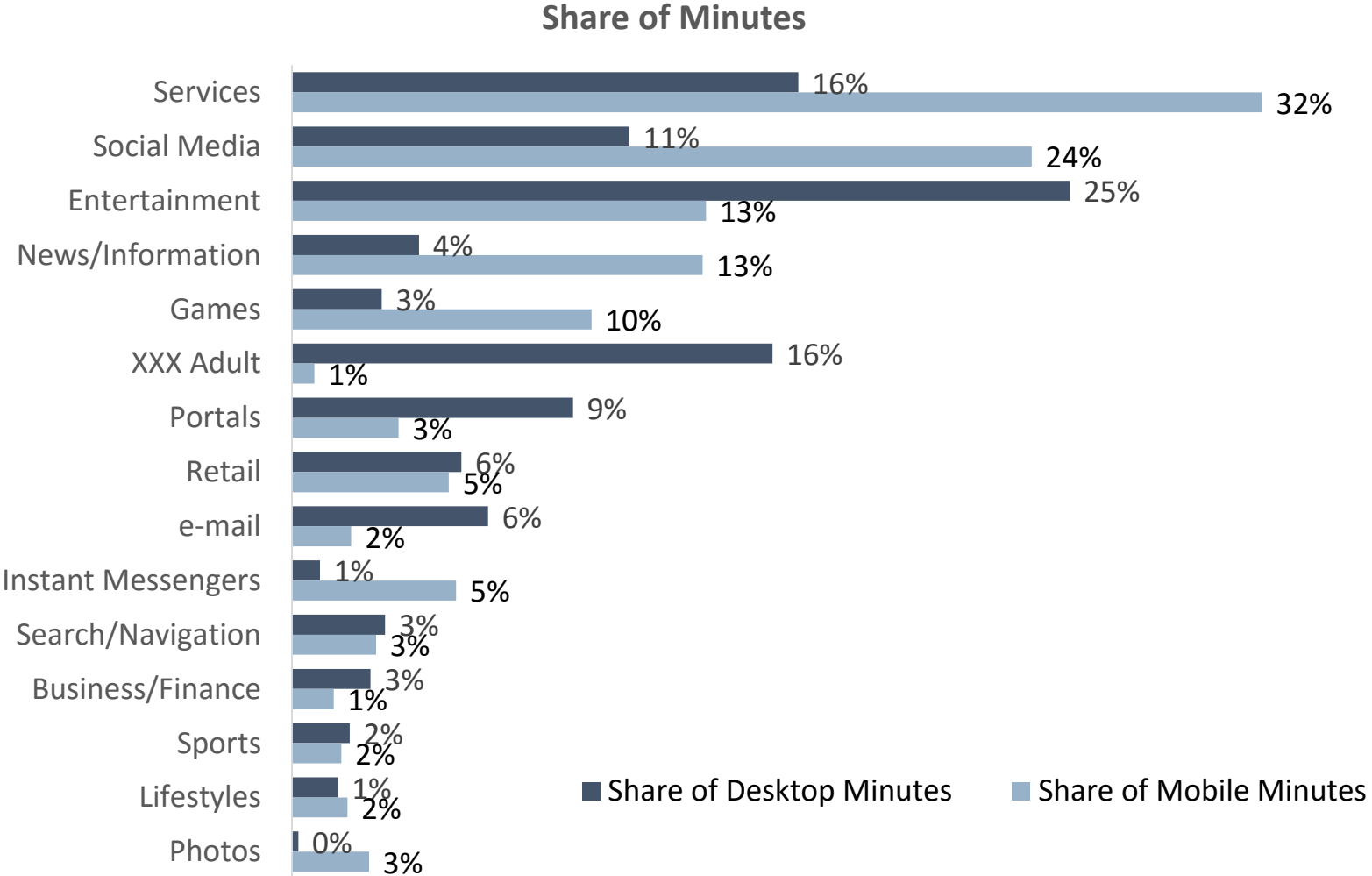
# Major Categories Online – Unique Visitors v Minutes

Entertainment, Social Media, News, Games, and adult sites have high engagement



# Category Share of Minutes by Platform

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



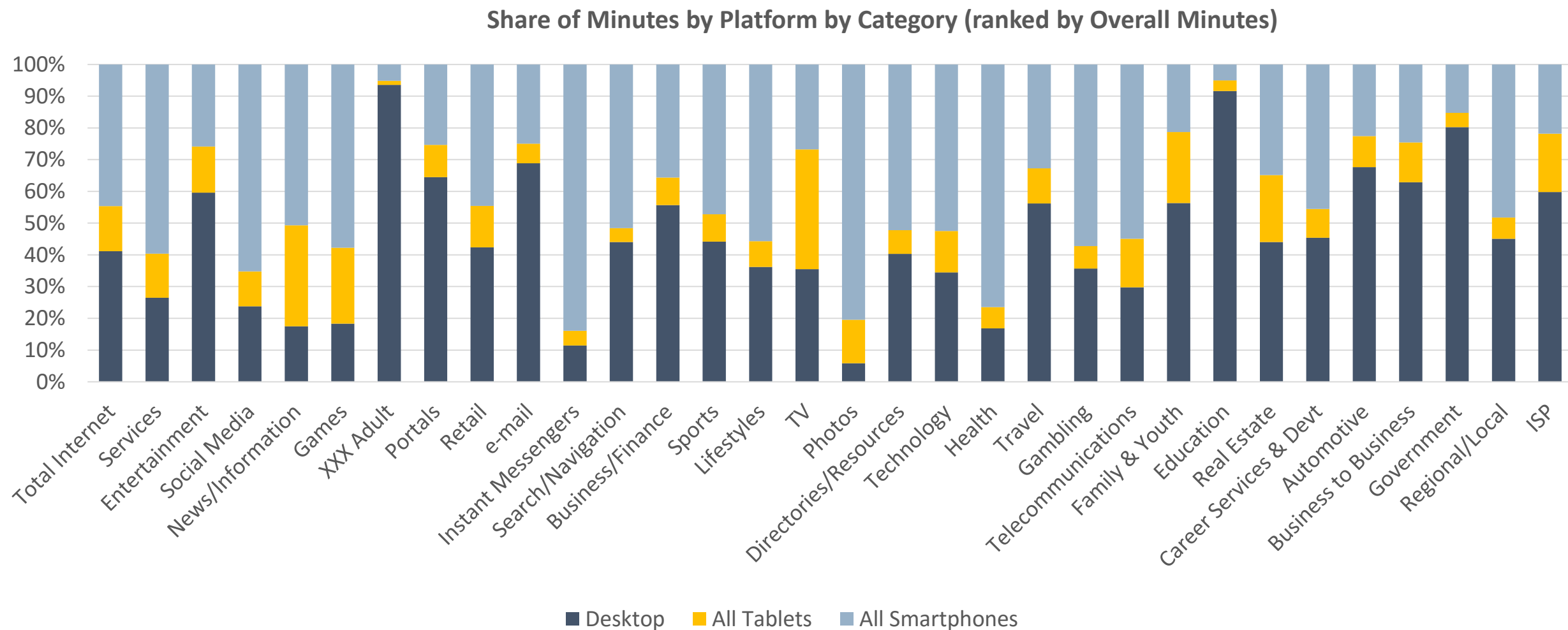
Entertainment Share of Desktop Minutes (25%) is nearly double it's share of Mobile/Tablet minutes (13%)

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



# Platform Share of Minutes by Category

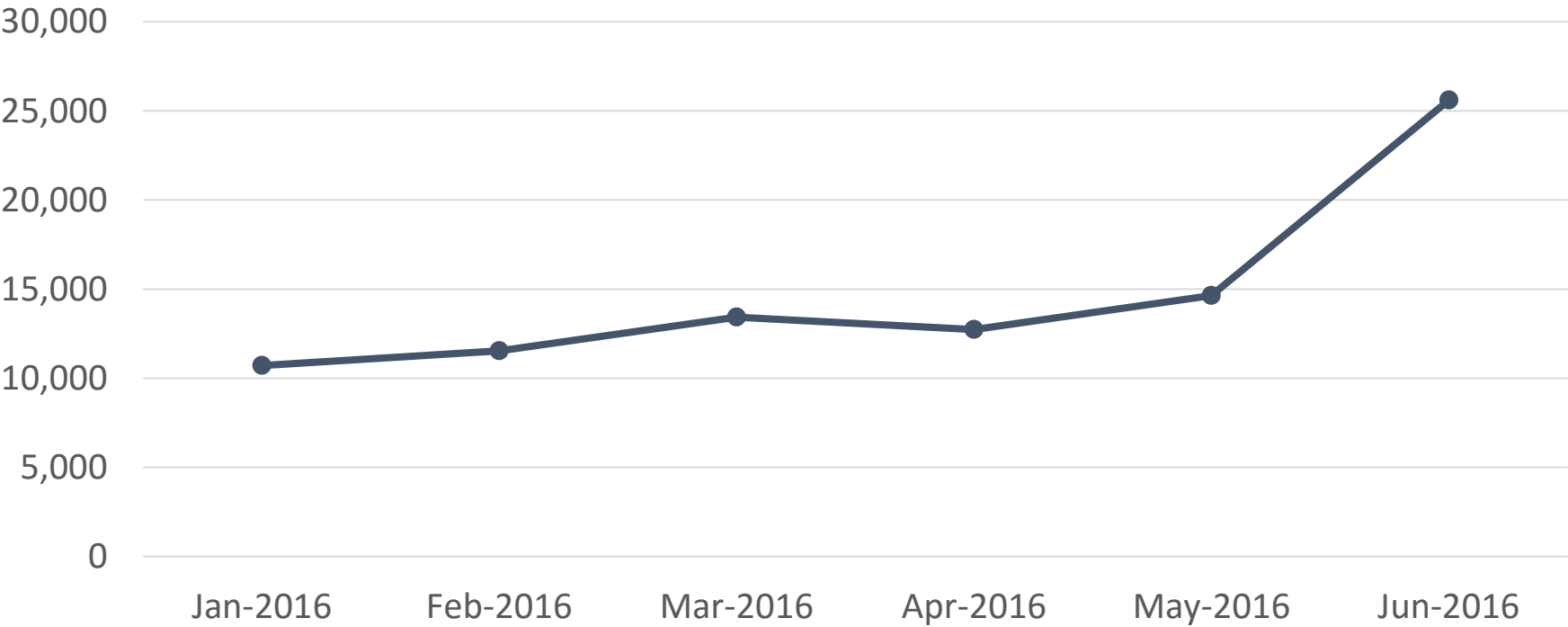
Desktop is still key for Adult, Email, Portals, Education, Autos & Government



# Unique Visitors to the Politics Category Jan-Jun 2016

Brexit contributed to a 10 .8 million increase in June!

Unique Visitors/Viewers (000) to the Politics Category in the UK in 2016

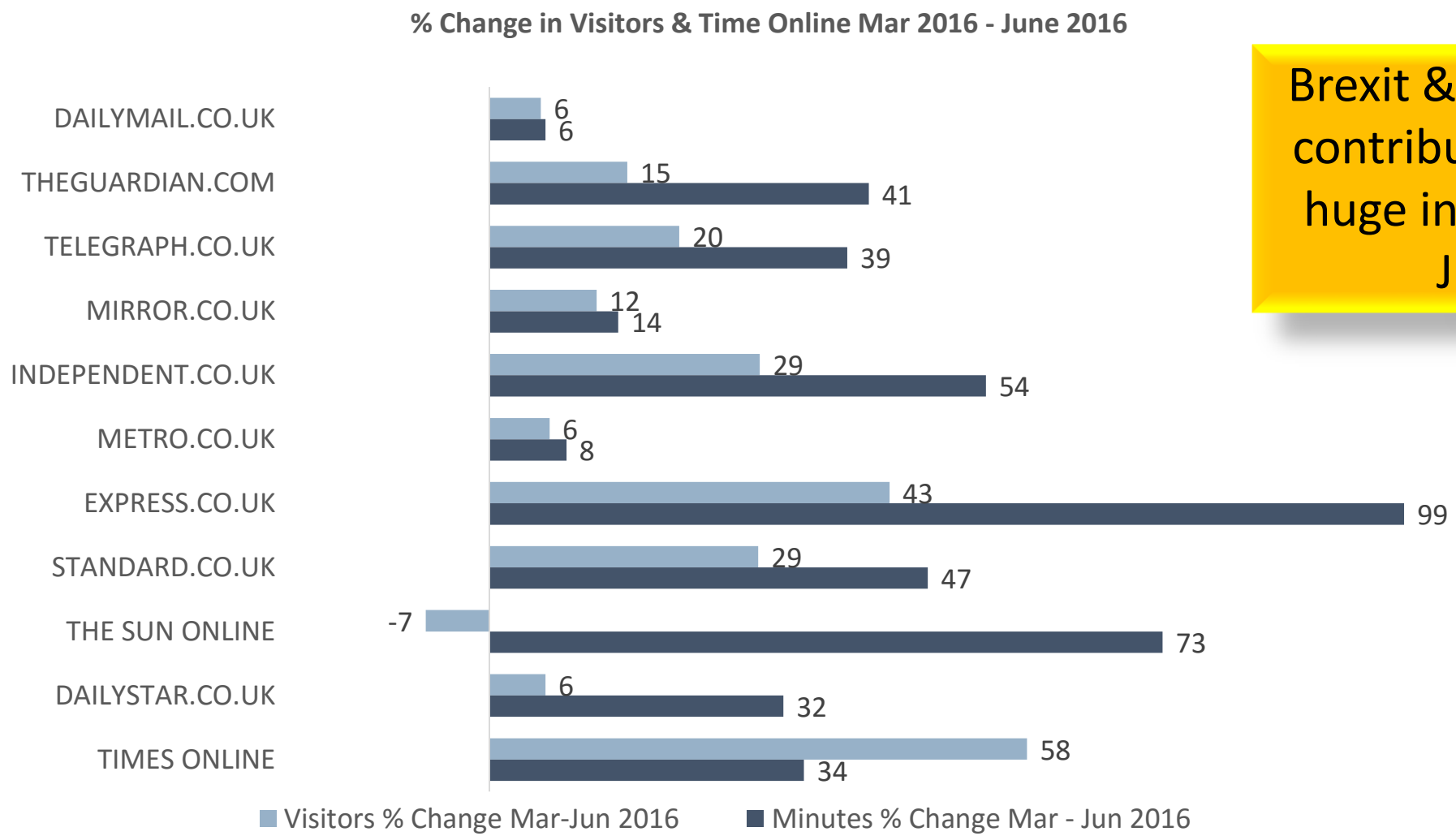


Reach increased by 25.9% points between May and June 2016

Average Minutes per Visitor increased from 7 mins in May to 11 in June

# % Change for online Newspapers' Minutes and Visitors: Mar-Jun 2016

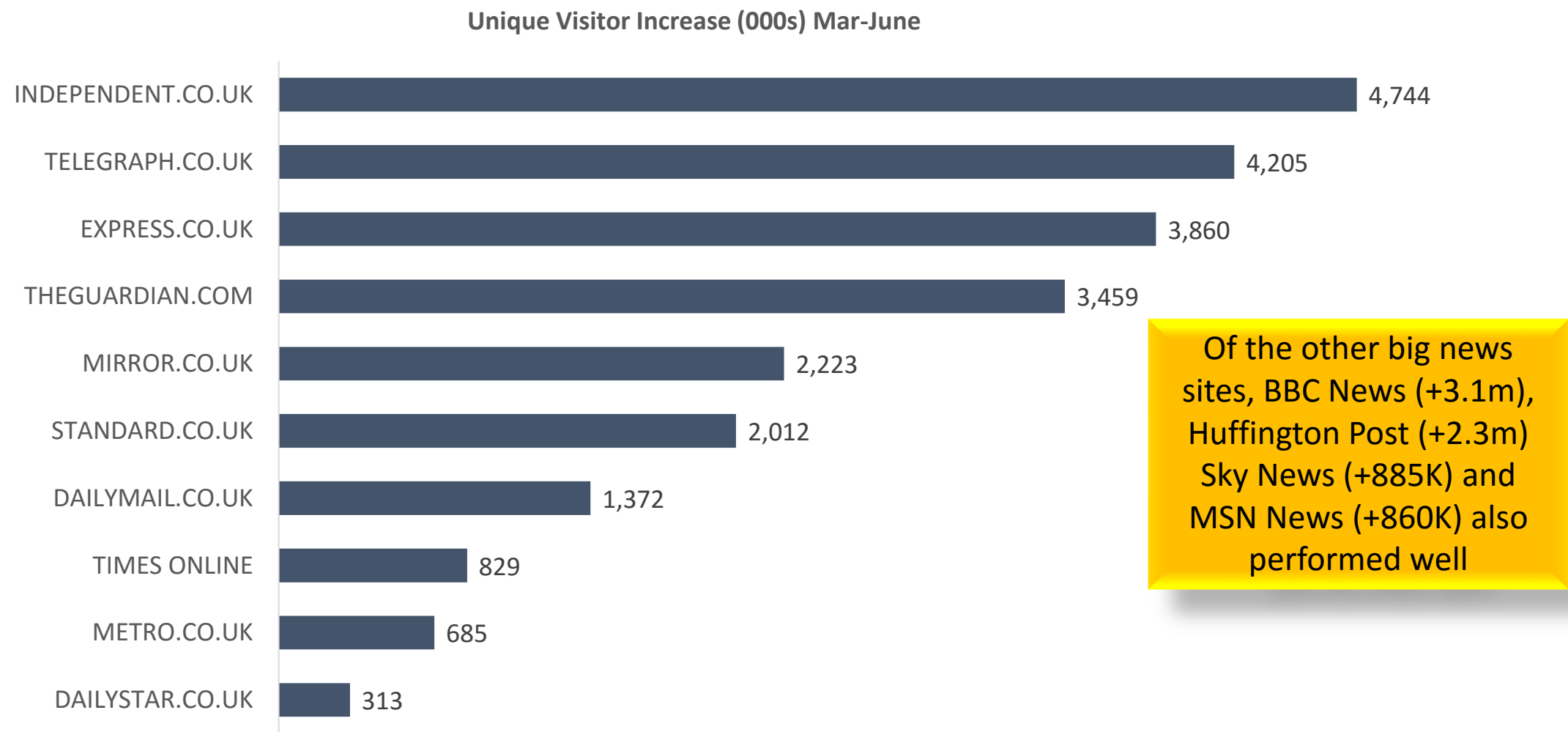
## National Newspaper Brands saw huge % uplifts in June, particularly for time spent



Brexit & Euro 2016 contributed to the huge increases in June

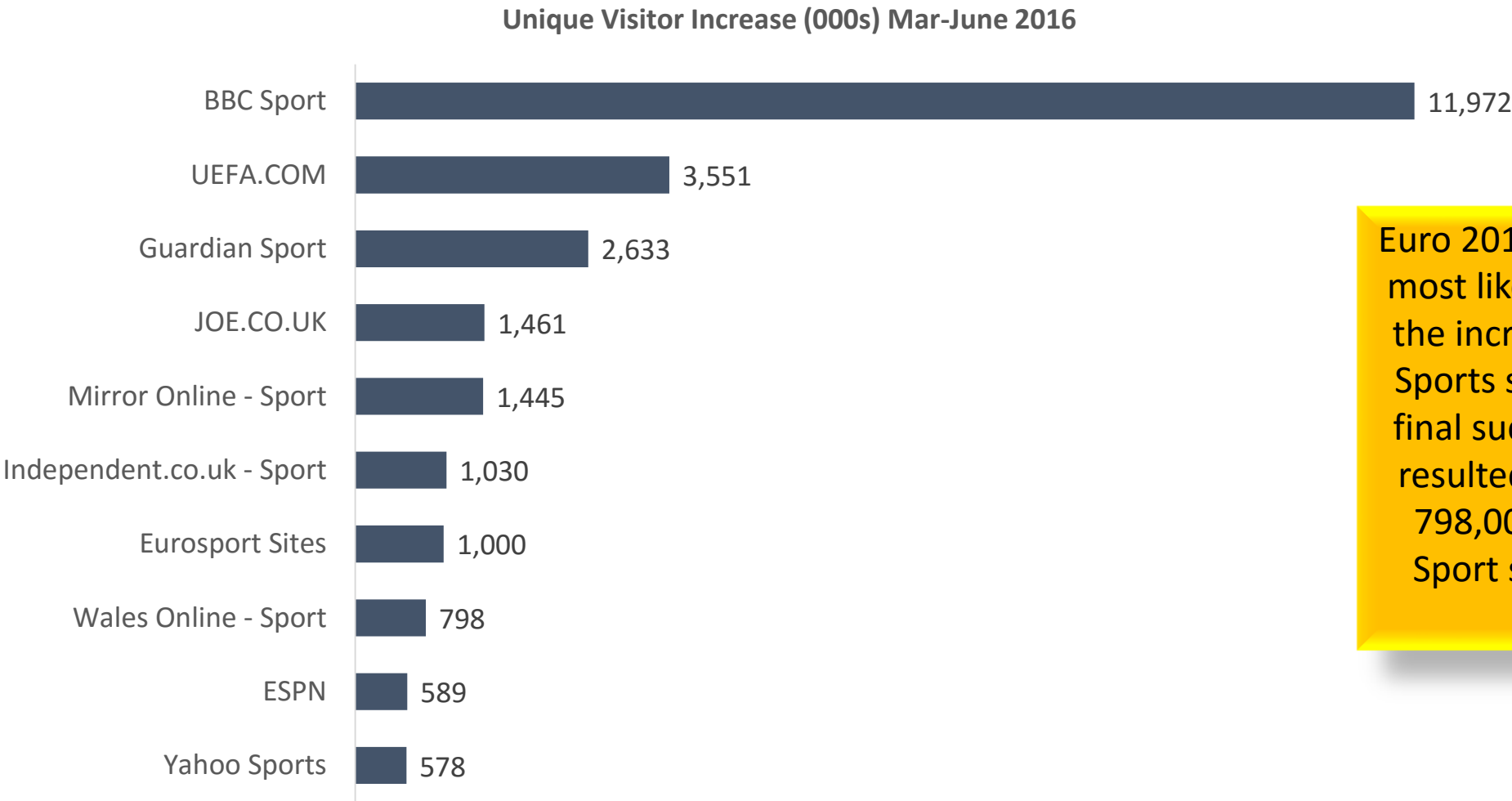
# Unique Visitor Increase for Online Newspapers: Mar-Jun 2016

Independent Online added the most number of visitors with a 4.7m increase



# Unique Visitor Increase for Sports Sites: Mar-Jun 2016

## BBC Sport, UEFA and Guardian Sport added the most visitors



Euro 2016 and Wimbledon most likely contributed to the increase in visitors to Sports sites. Wales semi-final success in the Euros resulted in an additional 798,000 visitors to the Sport section of Wales Online

# 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](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, 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, Oracle, SAP, Salesforce, Sears, Sony, Sun Microsystems, T-Mobile, Twitter, Yahoo!, and Zillow.



## STAY CONNECTED

[www.facebook.com/comscoreinc](http://www.facebook.com/comscoreinc)

[www.twitter.com/comScoreEMEA](http://www.twitter.com/comScoreEMEA)

[www.linkedin.com/company/comscore-inc](http://www.linkedin.com/company/comscore-inc)





# 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](mailto:insights@ukom.uk.net)

For questions about comScore's products & services please contact: [mshaw@comScore.com](mailto:mshaw@comScore.com)