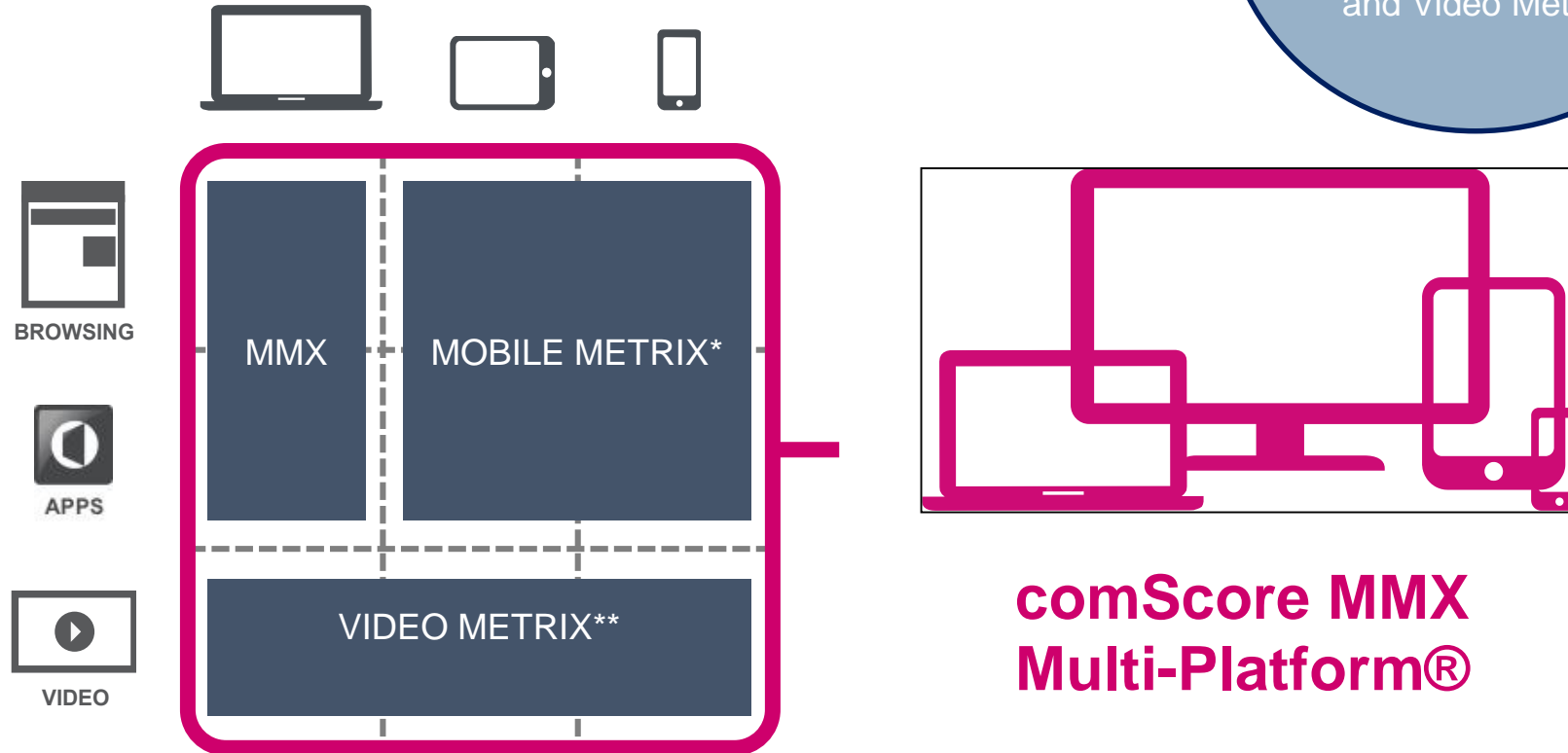


UK Digital Market Overview – September 2016

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

A Guide to Data Sources

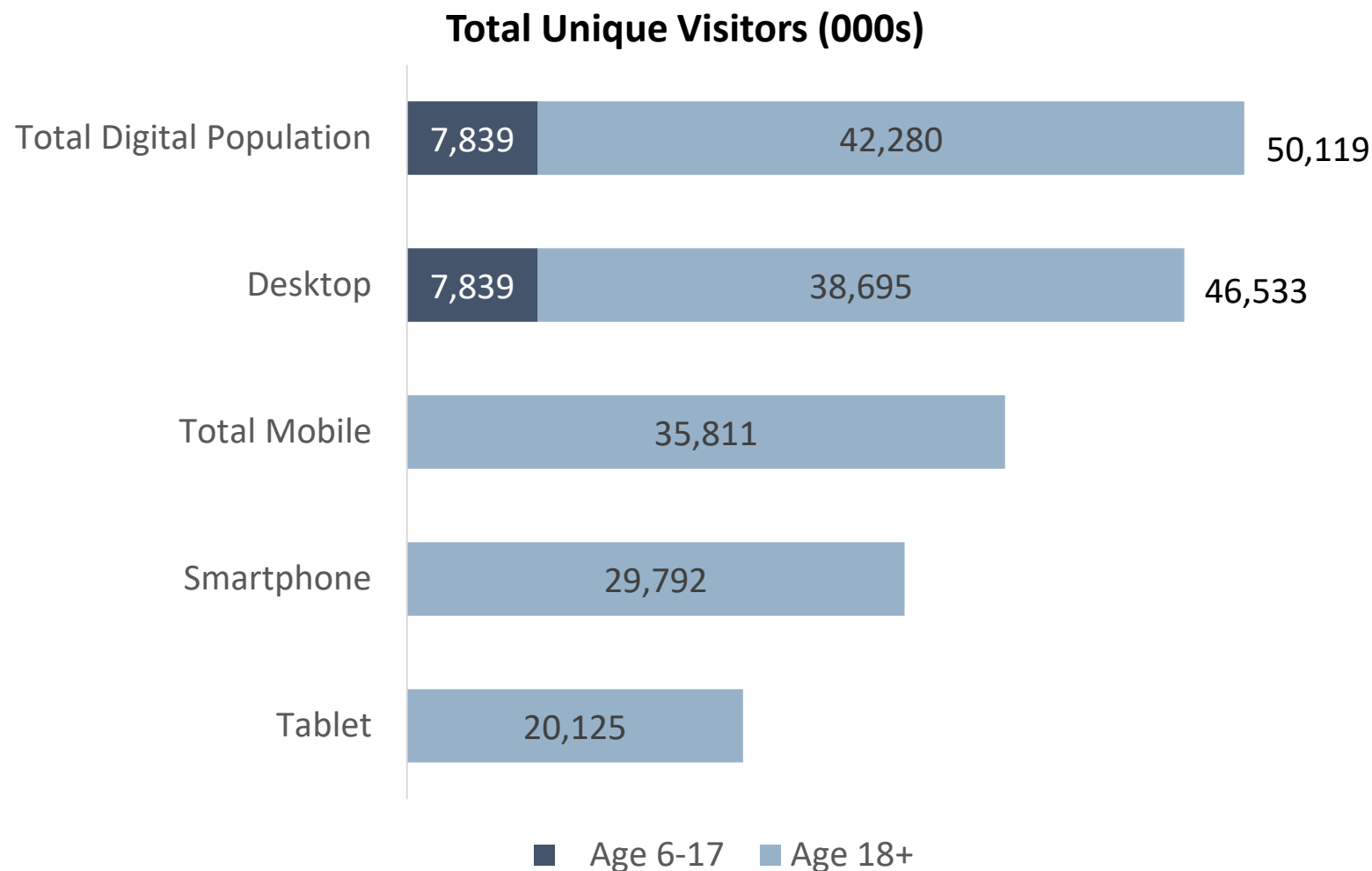
Total Digital
Population =
Unduplicated
audience across
MMX, Mobile Metrix
and Video Metrix



Multi-Platform Usage

Breakdown of Digital – Unique Visitors by Platform

Total Digital Population across desktop & mobile devices was 50.1m in Sept 2016

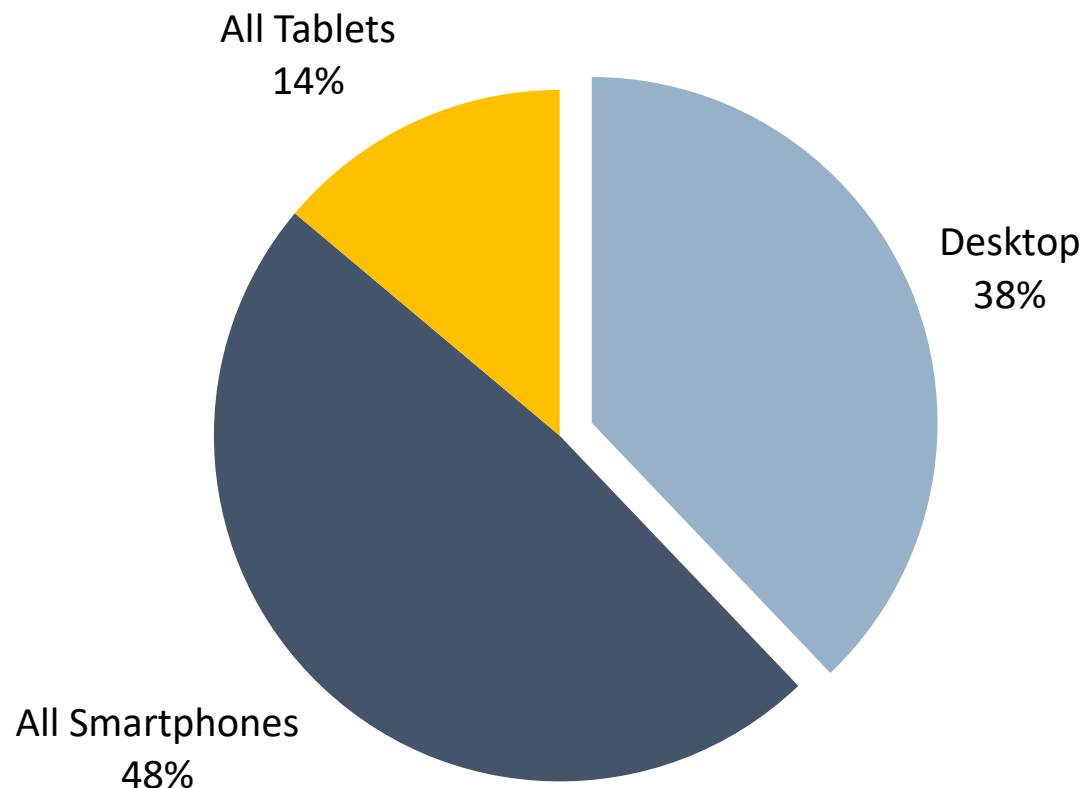


The desktop* still has the biggest audience despite mobile growth

Share of Minutes by Platform (Total Digital Population)

62% of adults' time online is now spent on mobile devices, up 2% since June 2016

Share of Minutes by Platform (18+)



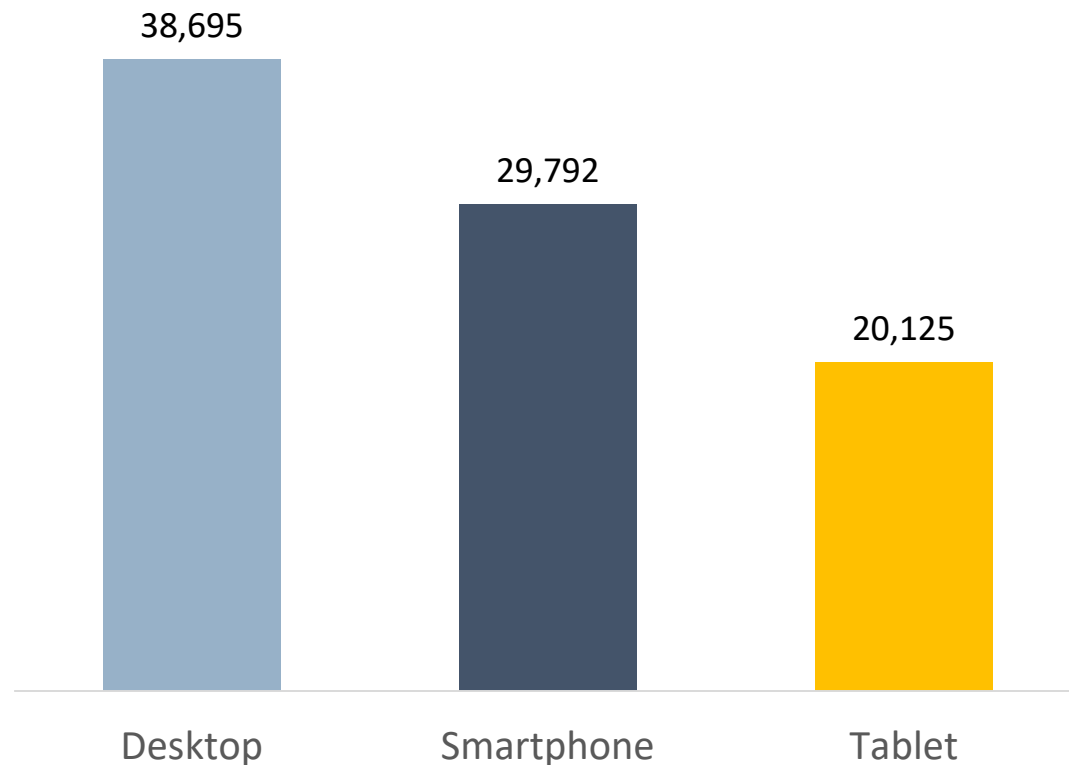
Source: comScore MMX Multi-Platform, Sept 2016, UK

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.

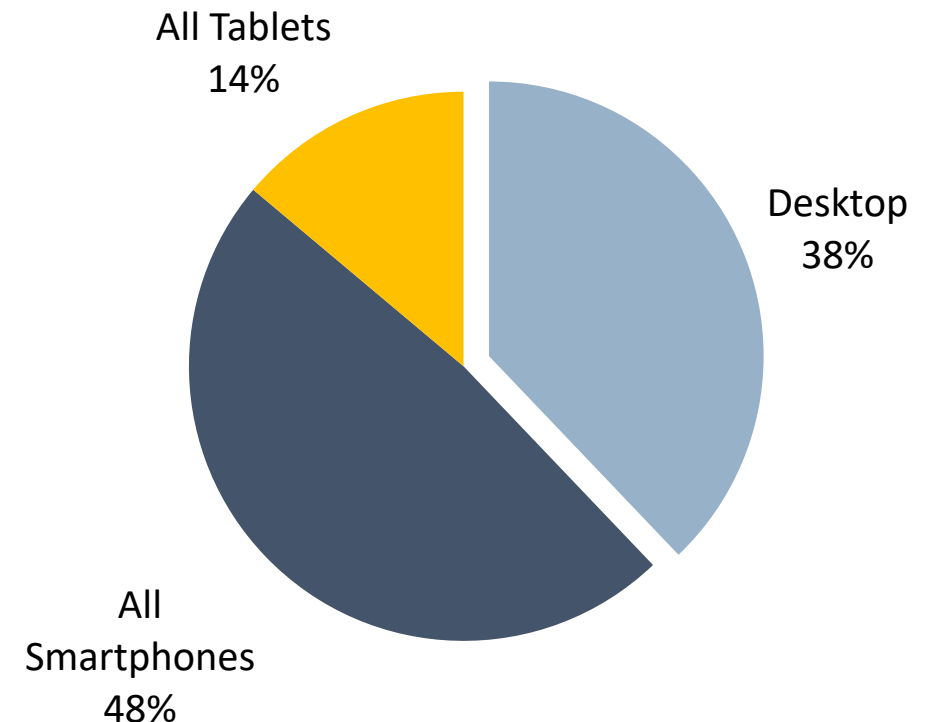
Unique Visitors and Share of Minutes by Platform

Although more adults use a PC, they spend more time on smartphones

Unique Visitors (000s) by Platform (18+)



Share of Minutes by Platform (18+)

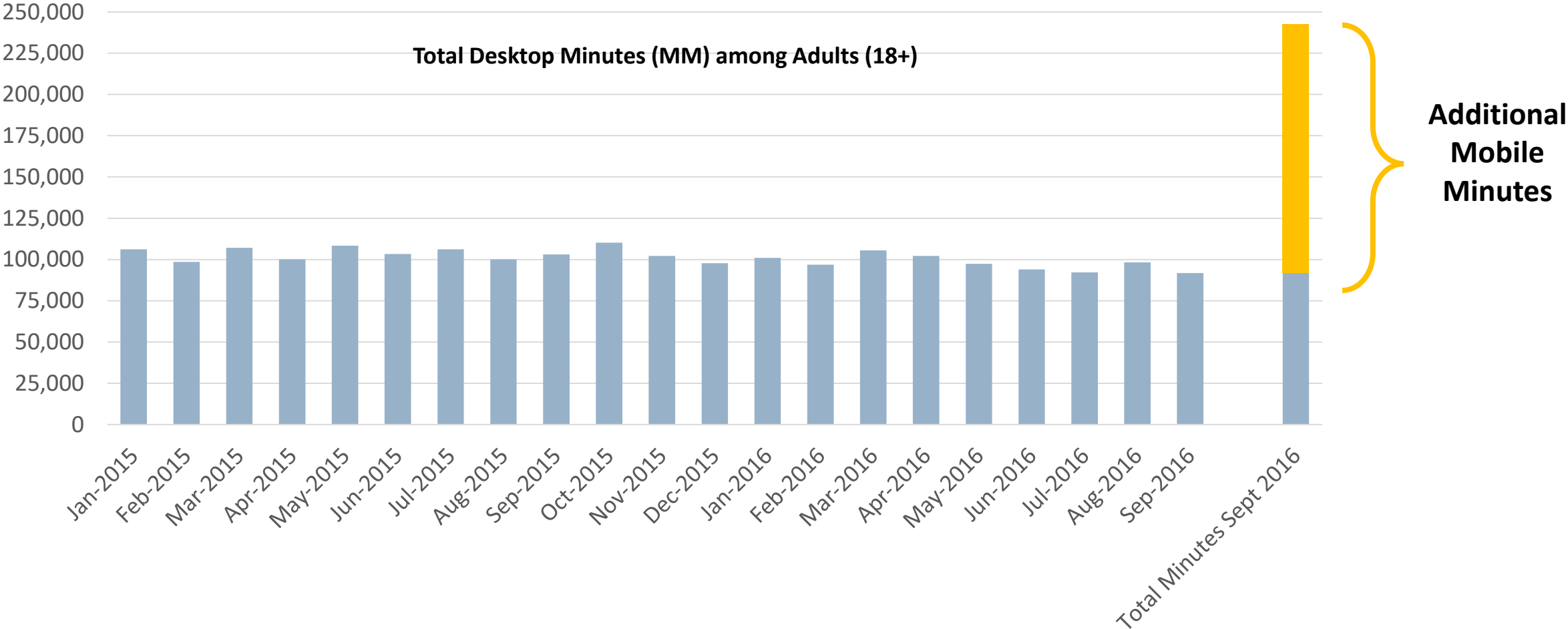


Source: comScore MMX Multi-Platform, Sept 2016, UK Adults 18+

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.

Desktop Minutes Among Adults over time – Jan 2015 to Sept 2016

Mobile is ‘boosting’ digital minutes rather than replacing the desktop



Source: comScore MMX Multi-Platform, Sept 2016, UK Adults 18+

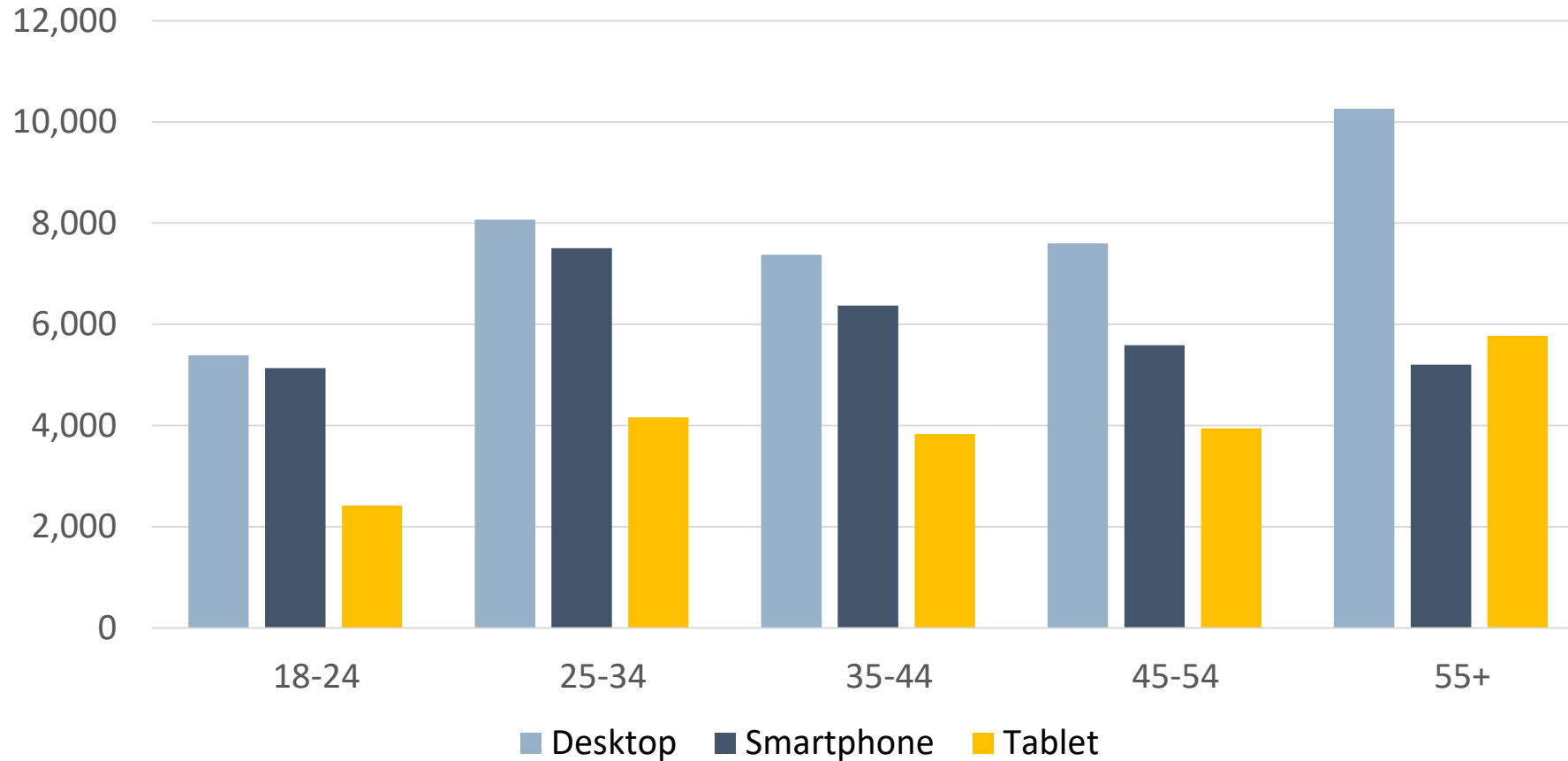
MMX Multi-Platform includes Desktop browsing, Desktop video streams, smartphone browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps.

Platform usage by demographics

Platform Unique Visitors by Age

The desktop still has the biggest audience across all age groups

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



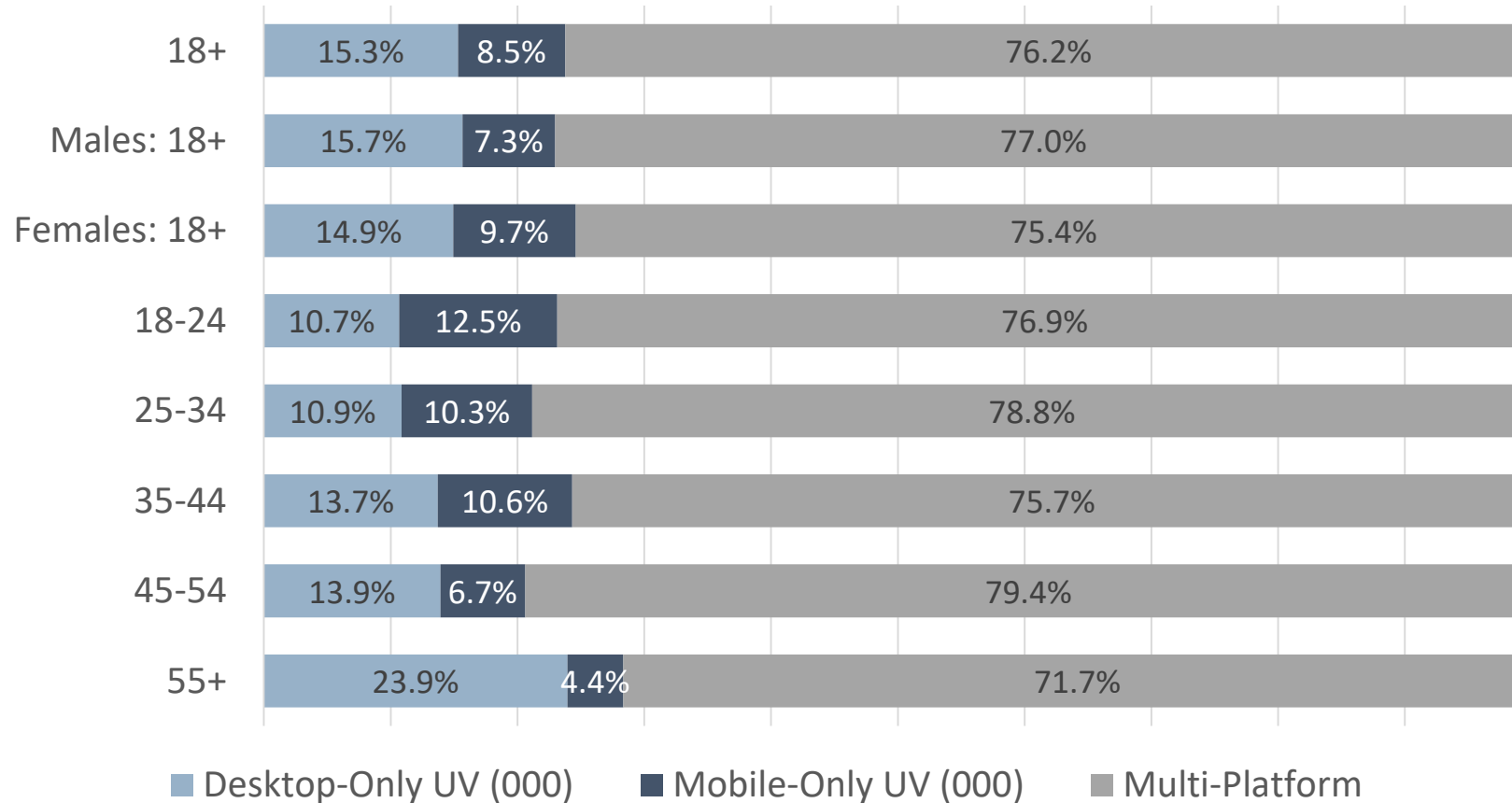
The desktop is still the device which has the biggest audience each month – across all age groups.

More 55+ use a tablet to access the internet than a smartphone

Platform Share by Unique visitors by demographic

¾ of online adults use both a PC and Mobile to access the internet

Unique Viewers by Platform by Age & Gender



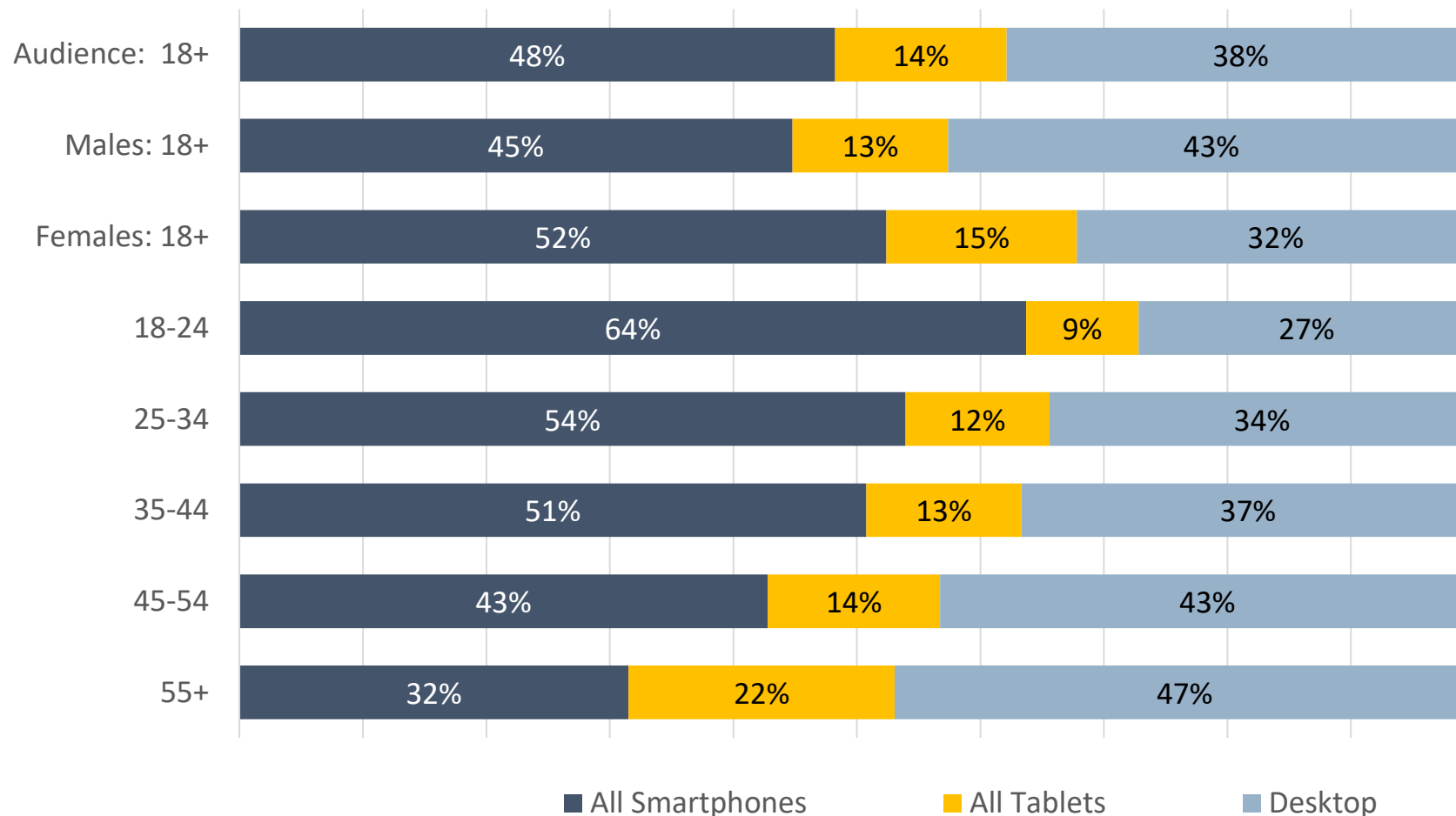
12.5% of 18-24s do not use a desktop PC to access the internet

A quarter (24%) of over 55s **ONLY** use the desktop/laptop

Platform Share of Minutes by Demographic

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

Share of Minutes

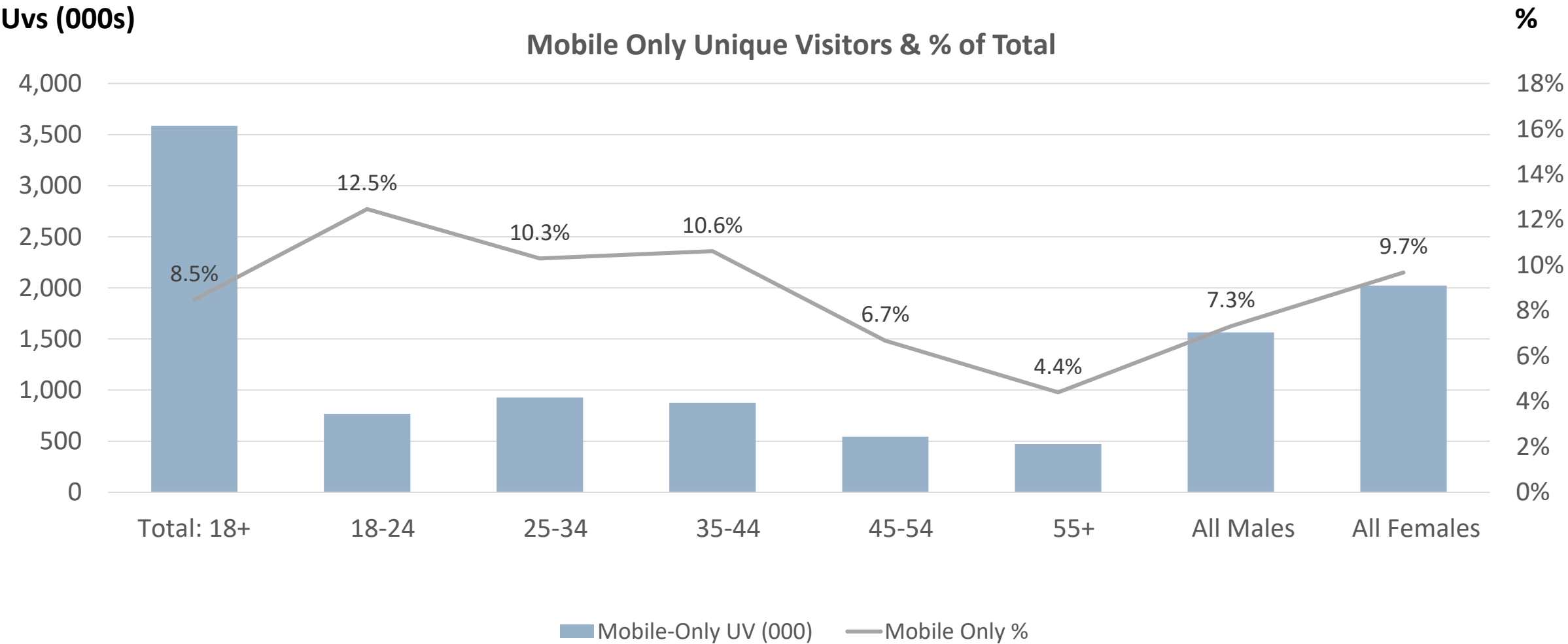


Females 18+ spend 67% of their time online on mobile devices compared to only 58% for males. The smartphone takes the lion's share of minutes for females 18+.

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

3.6m adults did not use a desktop/laptop to access the internet

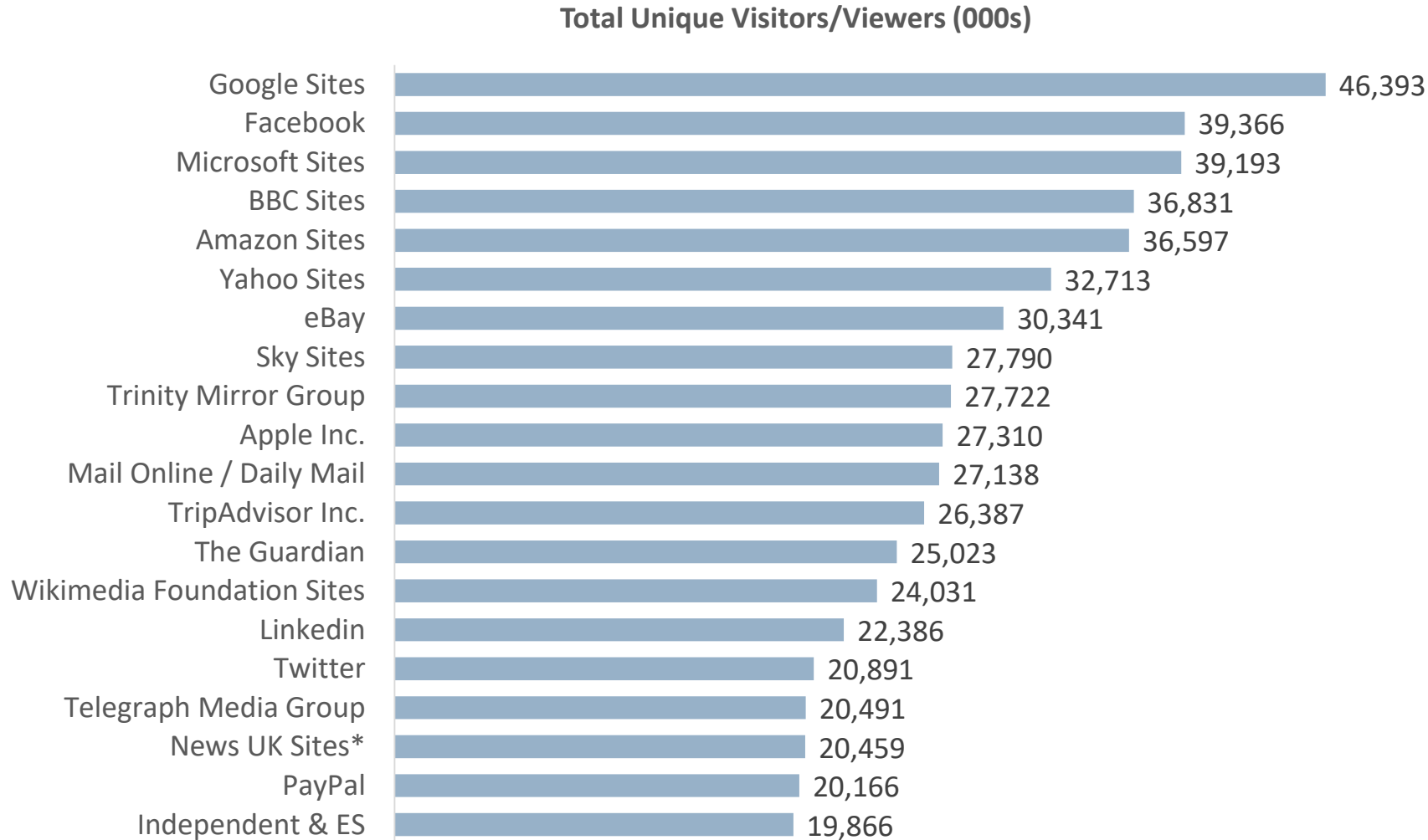
8.5% are now 'Mobile Only' – this is higher among younger audiences



Top Properties – Total Digital Population

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

Facebook retakes no.2 position from Microsoft



The top 4 all have an online reach of over 78%. Google is still no.1 with 92.6% of internet users visiting one of it's properties in Sept 2016

The AOL & Microsoft display advertising sales partnership gives AOL a combined audience of 36.3m or 72.5% reach in Sept

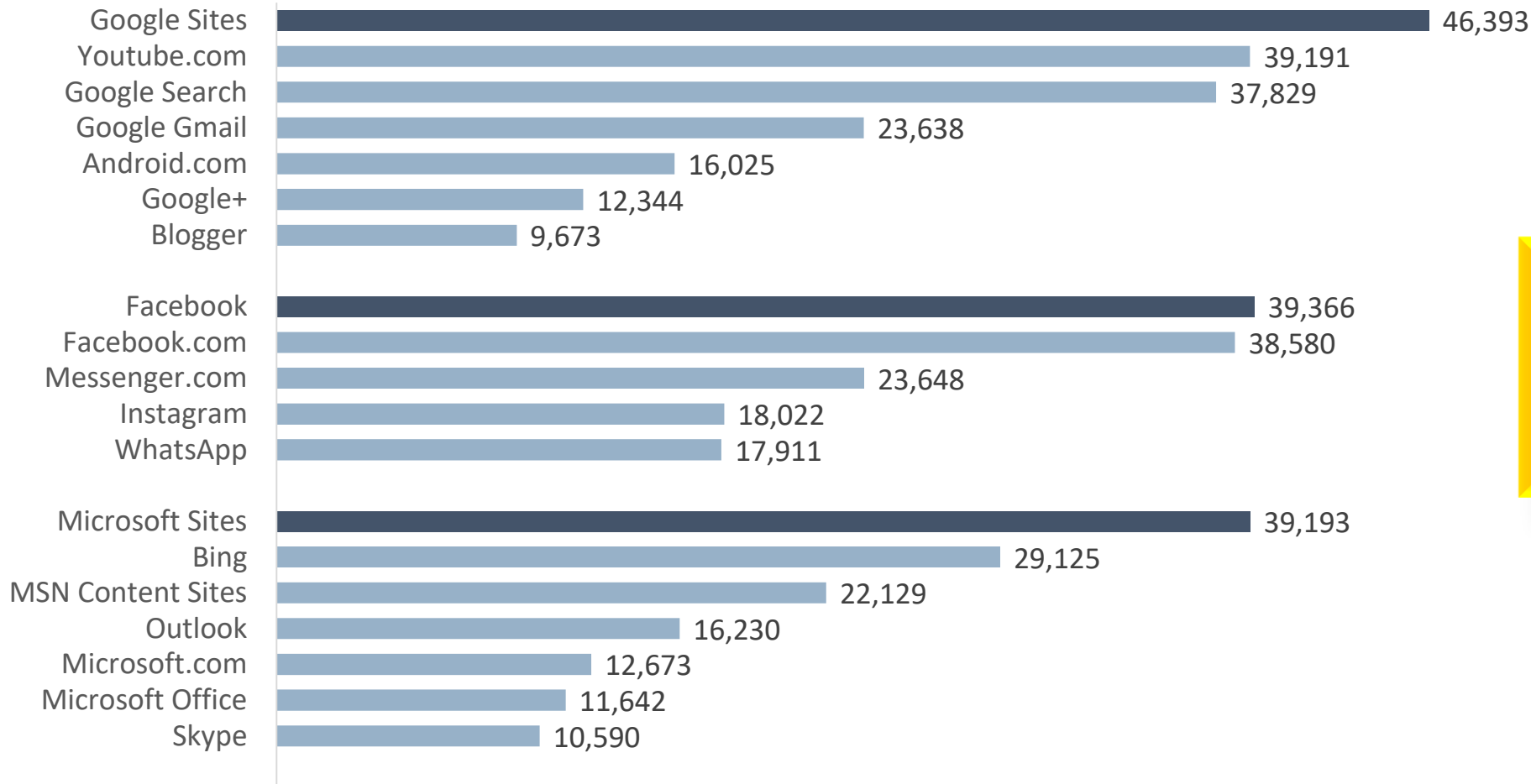
Source: comScore MMX Multi-Platform, Sept 2016, UK, Desktop Age 6+, Mobile Age 18+
MMX Multi-Platform includes Desktop browsing, Desktop video streams, smartphone browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps.

*Tagging by News UK caused increases from July 2016 data

Audience Breakdown of Top 3 Sites

Bing adds another 2.8m visitors to its audience since June 2016

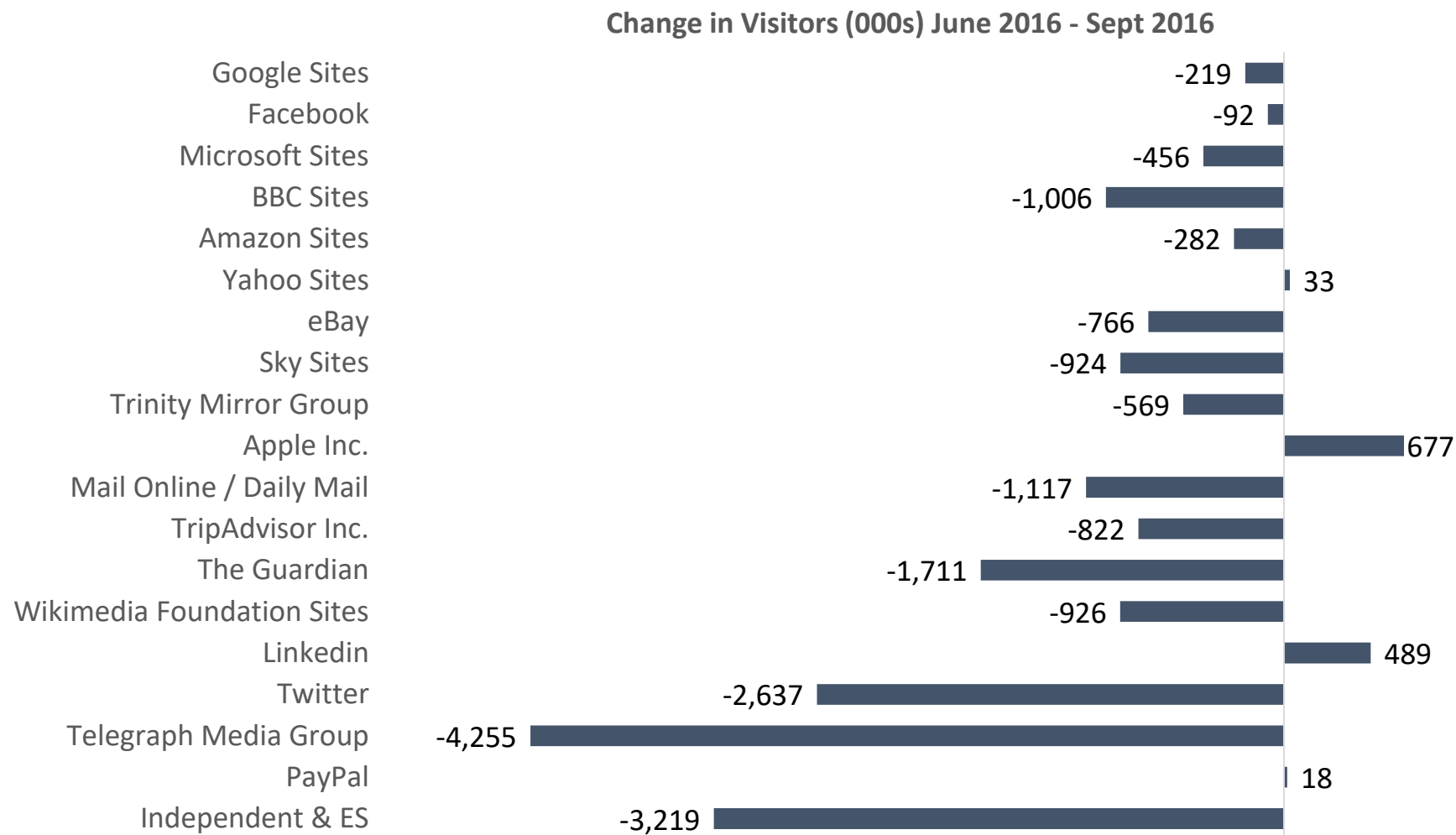
Total Unique Visitors (000s)



Bing's audience increased from 26.2m in June 2016 to 29.1m in Sept – an increase of 2.8m whilst Google Search decreased by 1 million

Key Unique Visitor Changes June-Sept 2016: Top 20 Properties

Apple & LinkedIn grow but most sites return to pre-Brexit levels



For most of the top sites, visitor numbers return to pre-Brexit levels after big increases in June 2016

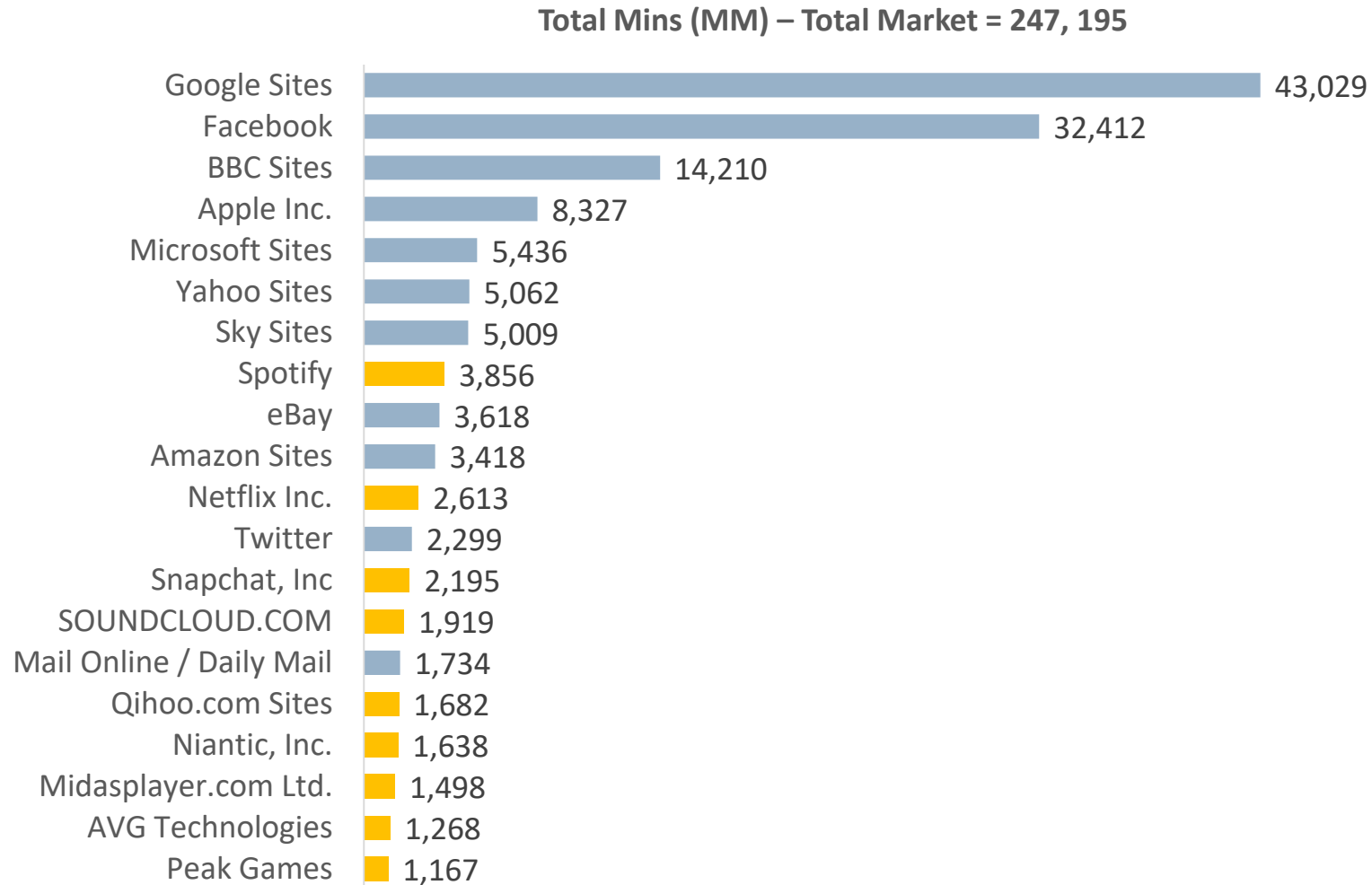
Of the top 20, only Apple and LinkedIn increased visitors since June 2016

Source: comScore MMX Multi-Platform, Sept 2016, UK, Desktop Age 6+, Mobile 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.

*News UK change is not listed due to tagging changes in July 2016

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

Google (YouTube) and Facebook account for 30% of all time online

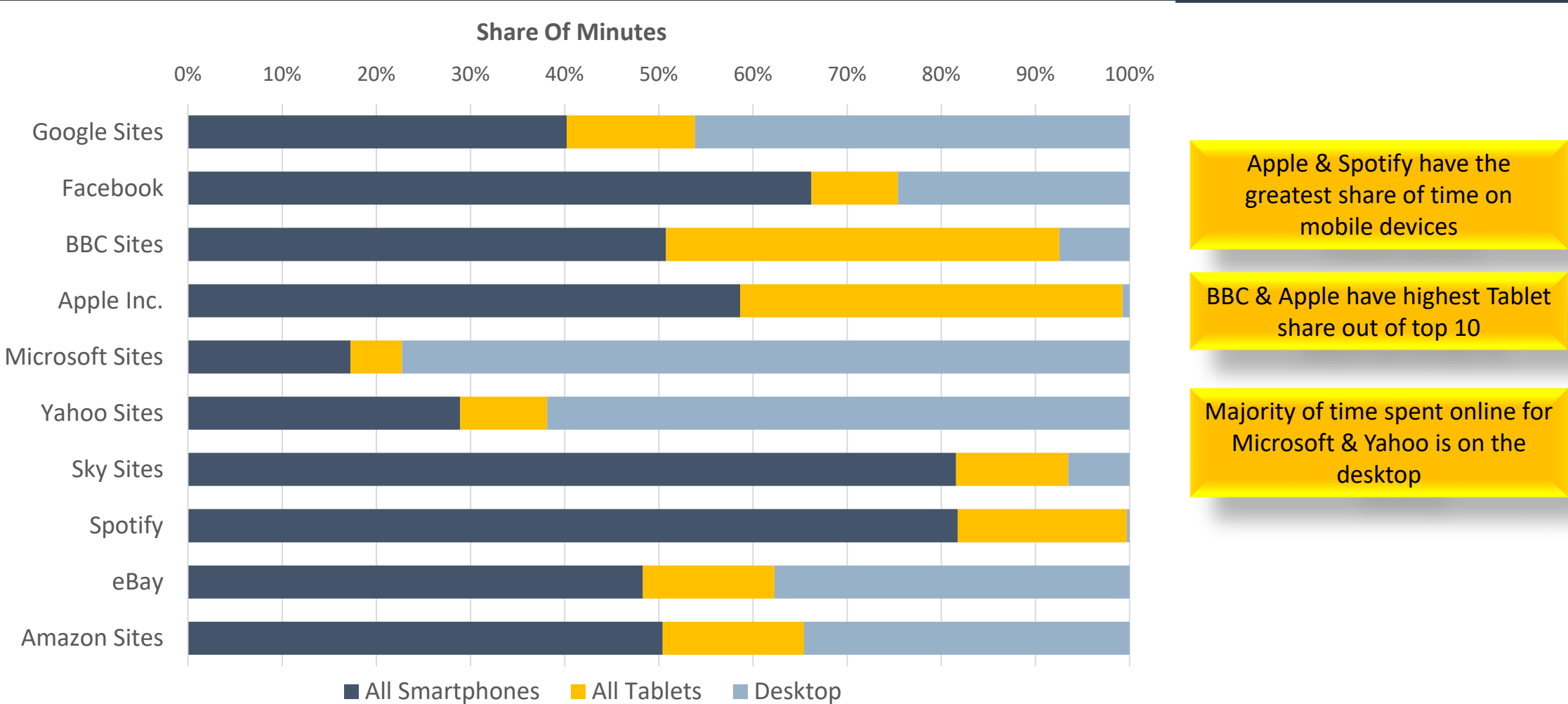


Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

Social Media & Entertainment categories drive minutes.

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

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



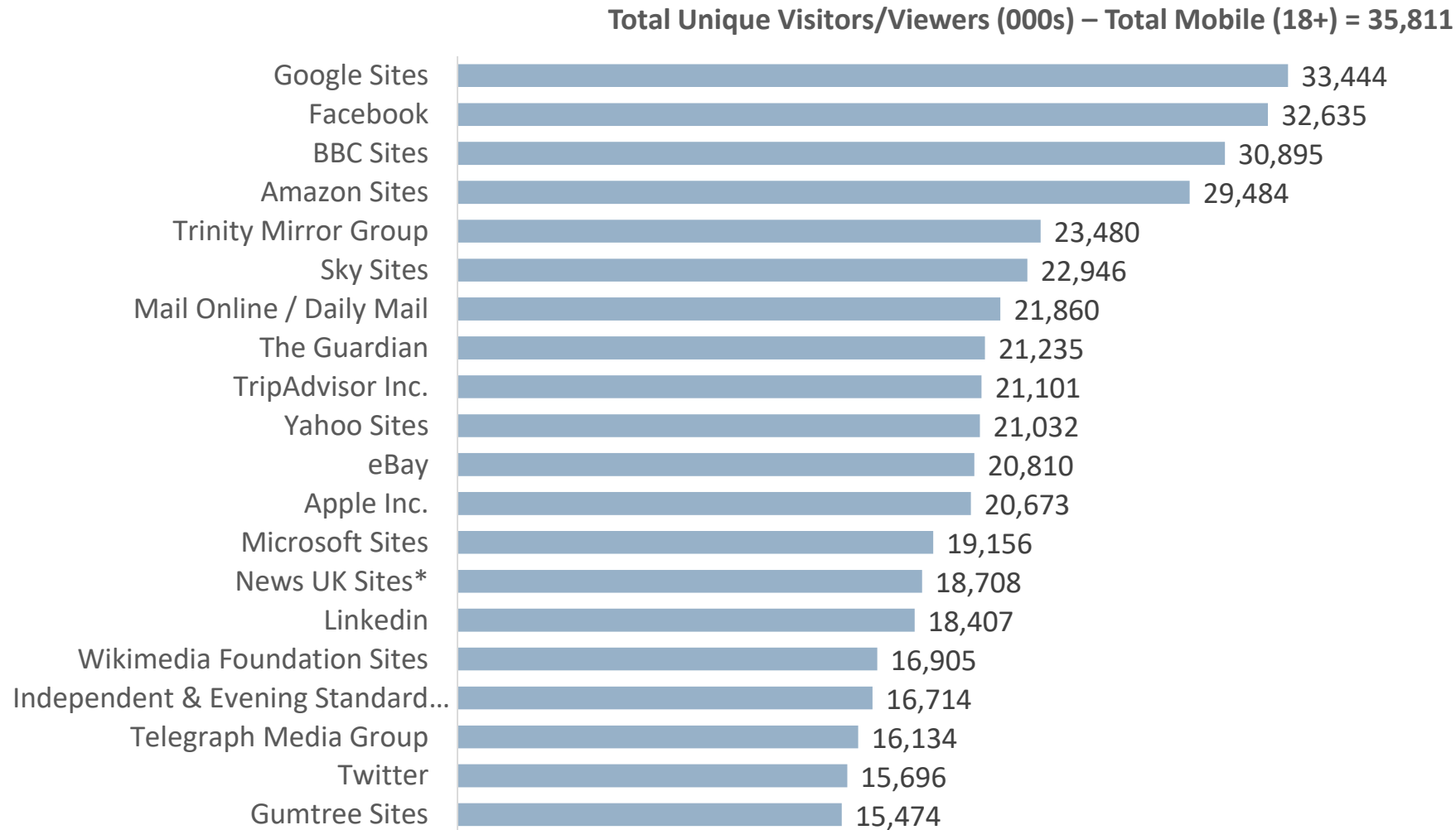
Source: comScore MMX Multi-Platform Sept 2016, UK, Based on age 18+

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. * comScore enhanced measurement to include background 'audio' minutes drives up audio services such as Spotify and Soundcloud from Sept 2016 data

Top Properties – Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

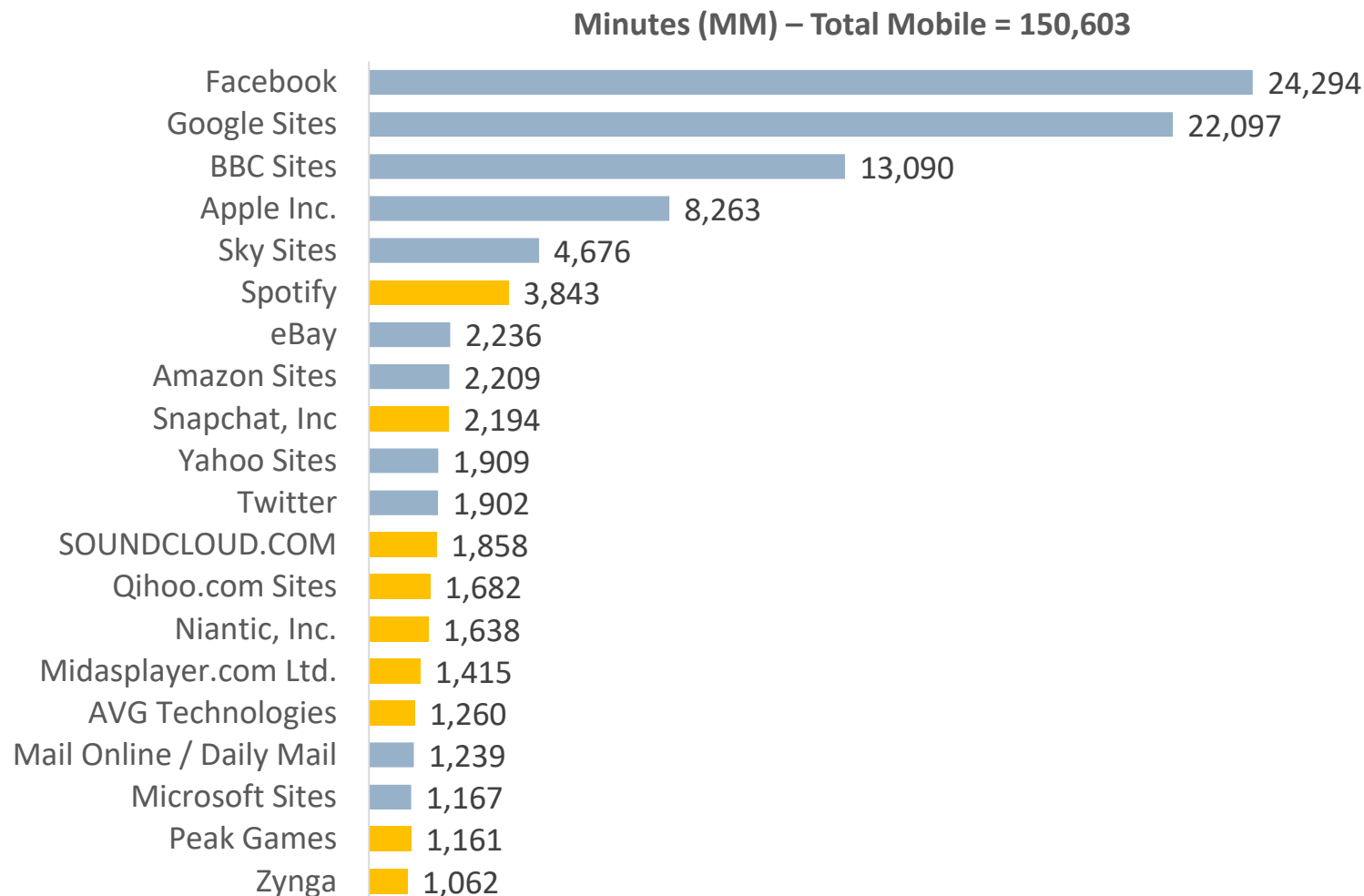
35.8m adults accessed mobile content in Sept 2016 (via browser and app)



Gumtree ranks in the top 20 for mobile UVs but not in the Top 20 for Total Digital Population. It replaces PayPal (no. 21)

Top 20 Mobile Properties ranked by minutes

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

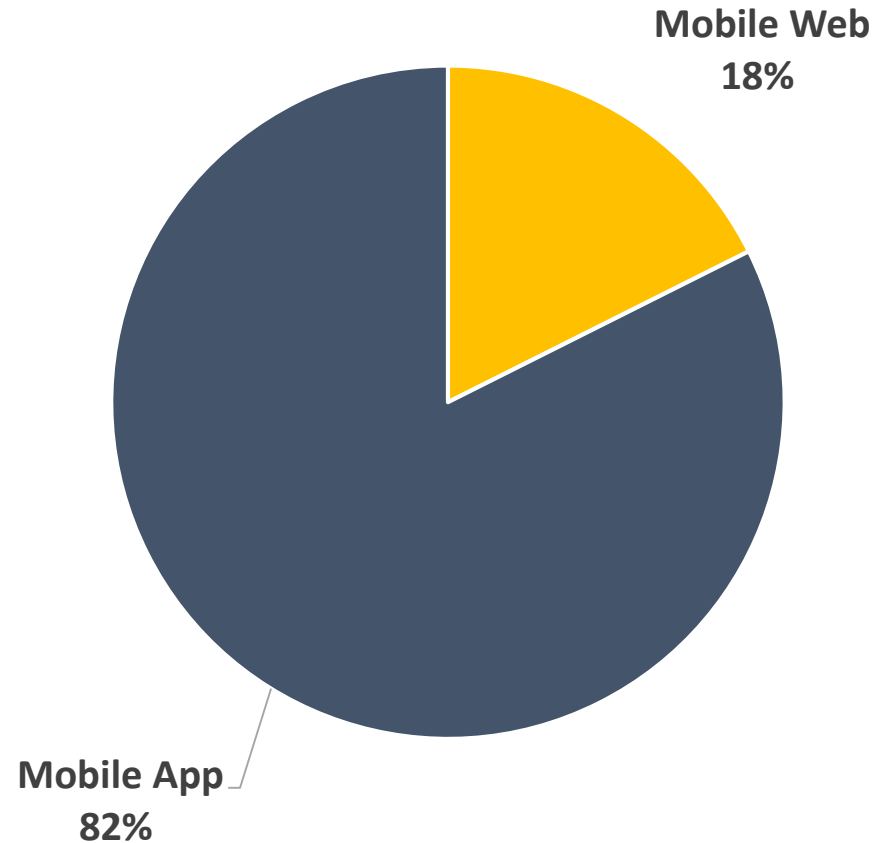


Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

Share of Mobile Minutes by Access Type

4 in 5 mobile minutes come from applications

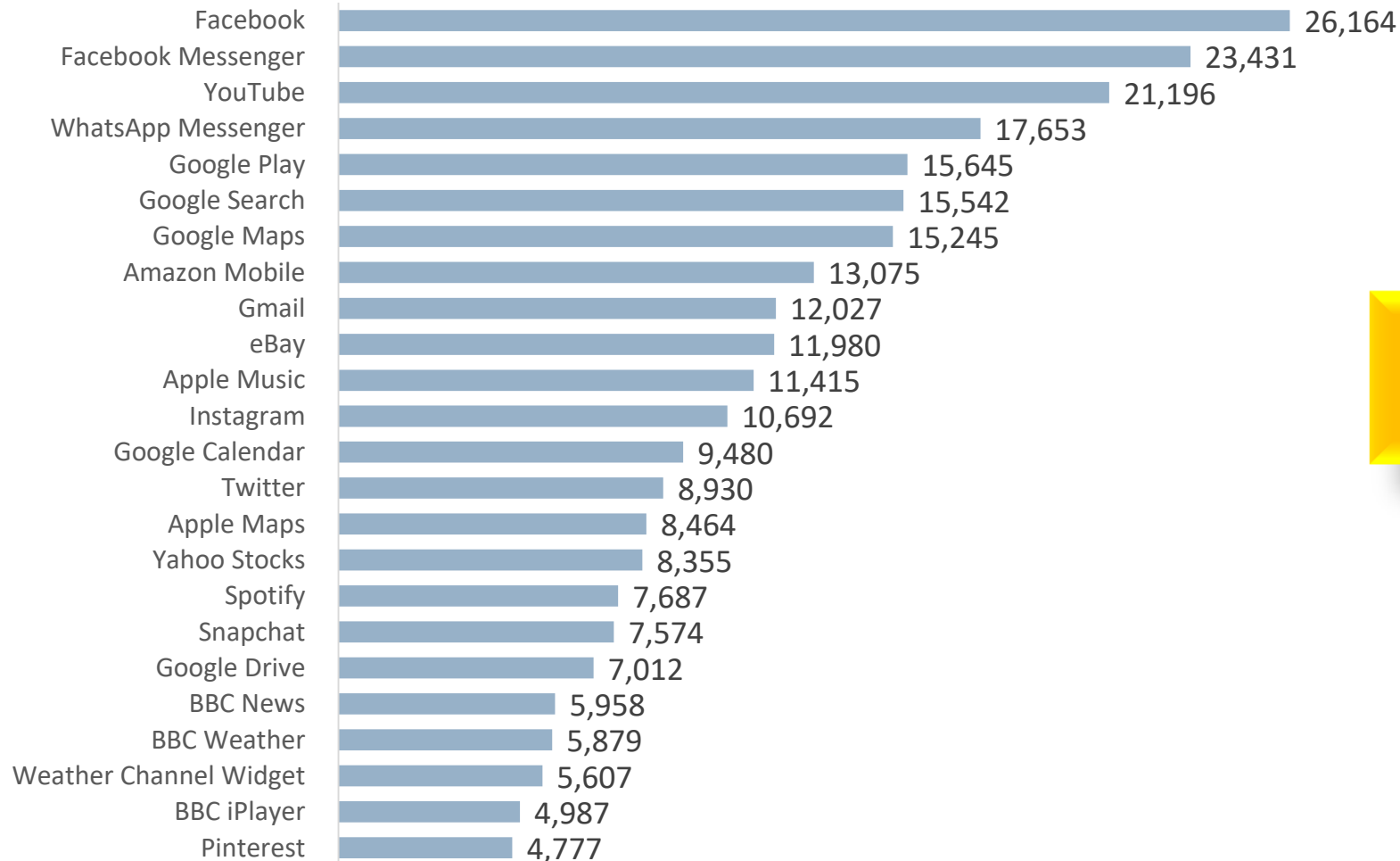
Share of Minutes by Platform



Top 20 Mobile Apps ranked by Unique Visitors

32.8m adults accessed a mobile app in Sept 2016

Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 32.8m

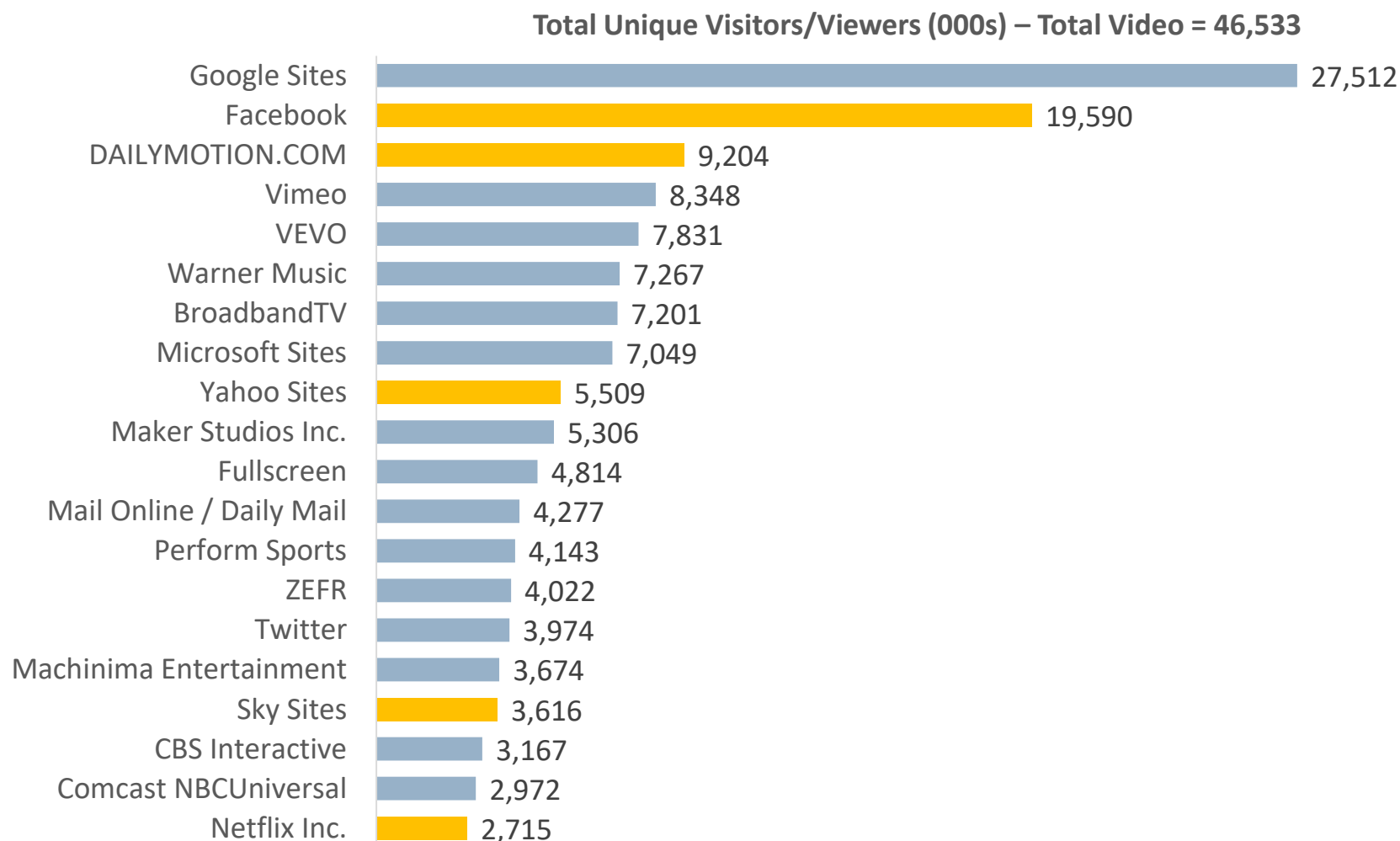


8 out of 10 of the top Apps are owned by Google or Facebook

Top Properties – Video Viewers

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

Netflix enters the top 20 in Sept 2016.



Dailymotion's audience increases by nearly 4million since June 2016 – the increase came in both August and September – likely to be a result of Olympics videos & Paralympics live streaming

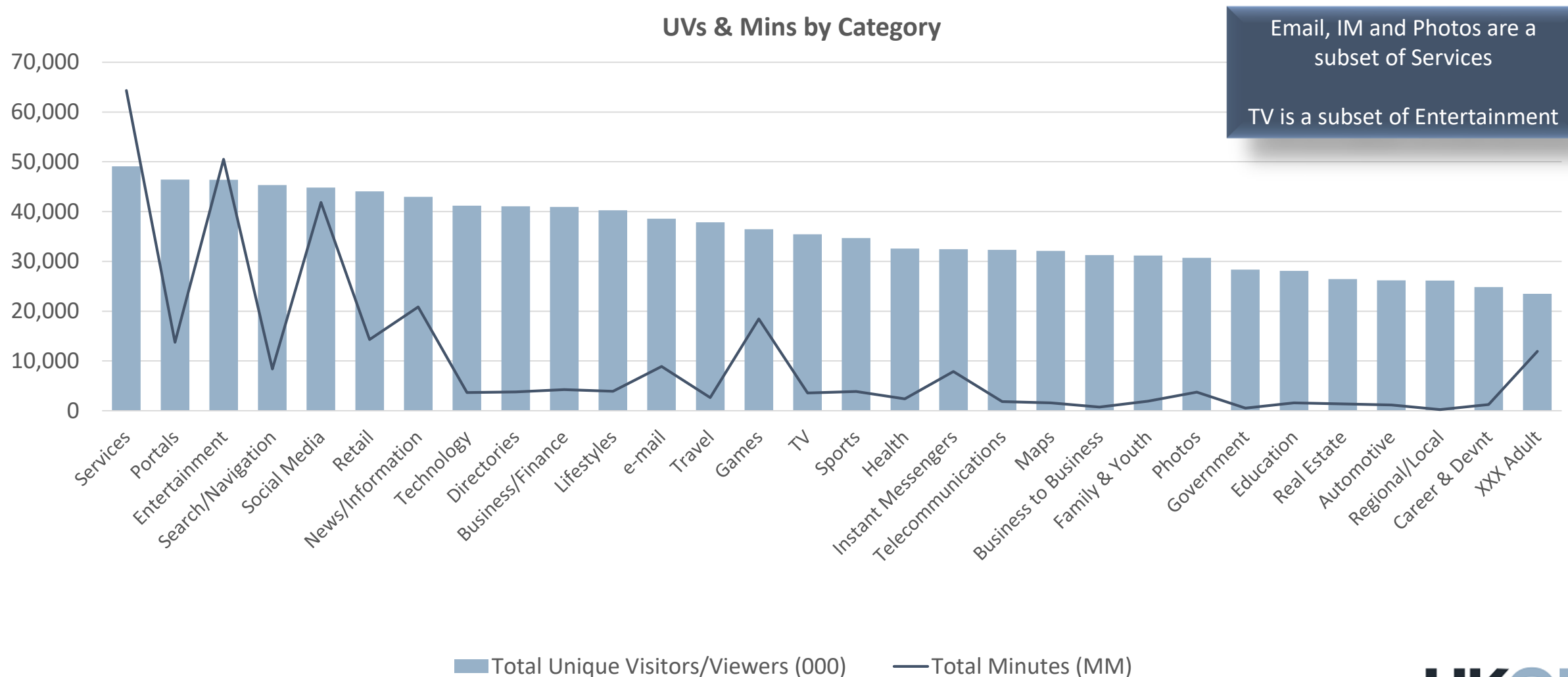
Netflix has overtaken the BBC for desktop video viewers

Brands in yellow had higher Video Desktop Audience in Sept compared to June 2016

Categories

Major Categories Online – Unique Visitors v Minutes

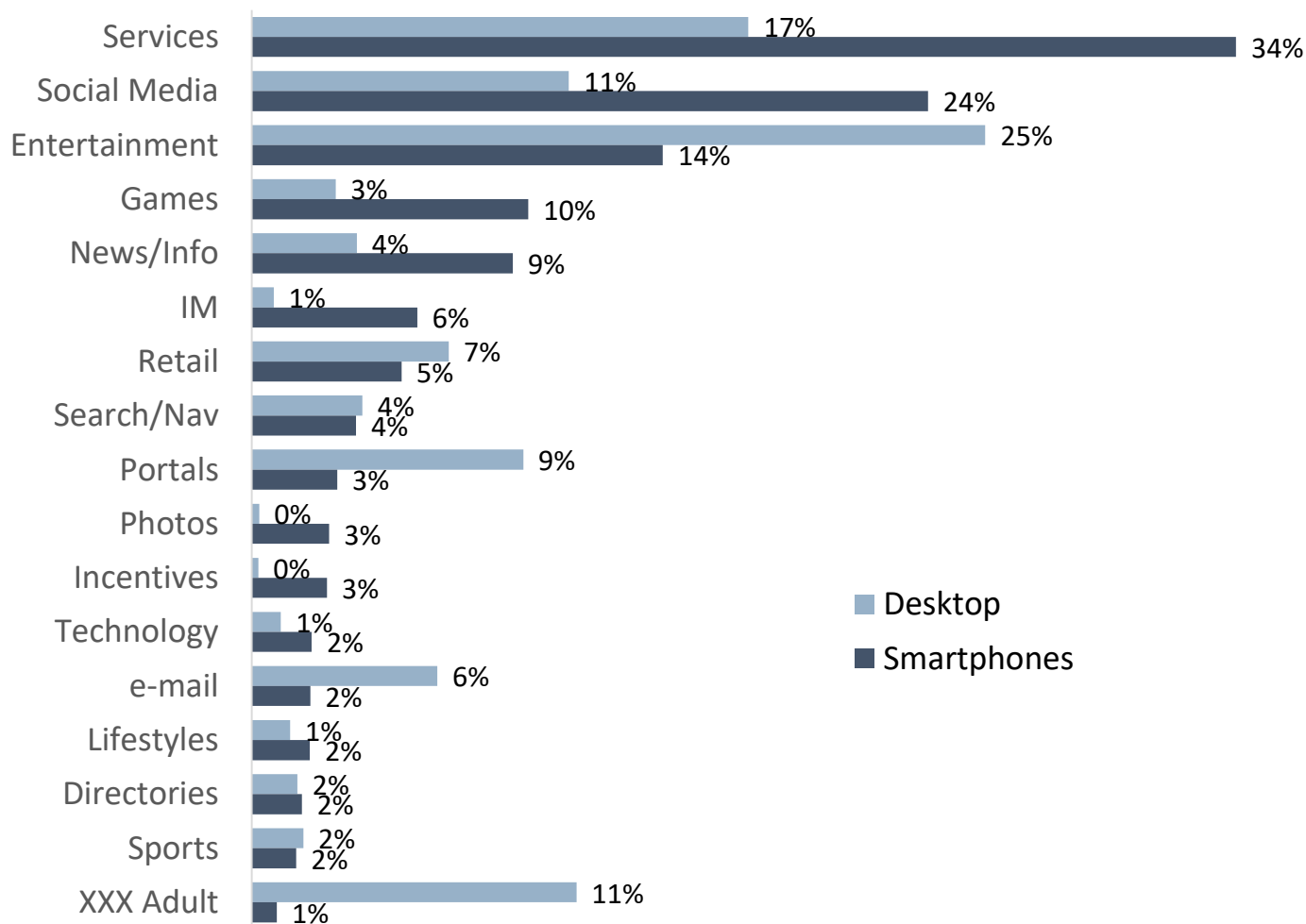
Entertainment, Social Media, News, Games and adult sites have high engagement



Category Share of Minutes by Platform

Social media's share of smartphone time is more than double its desktop share

Category Share of Total Desktop and Total Smartphone Minutes

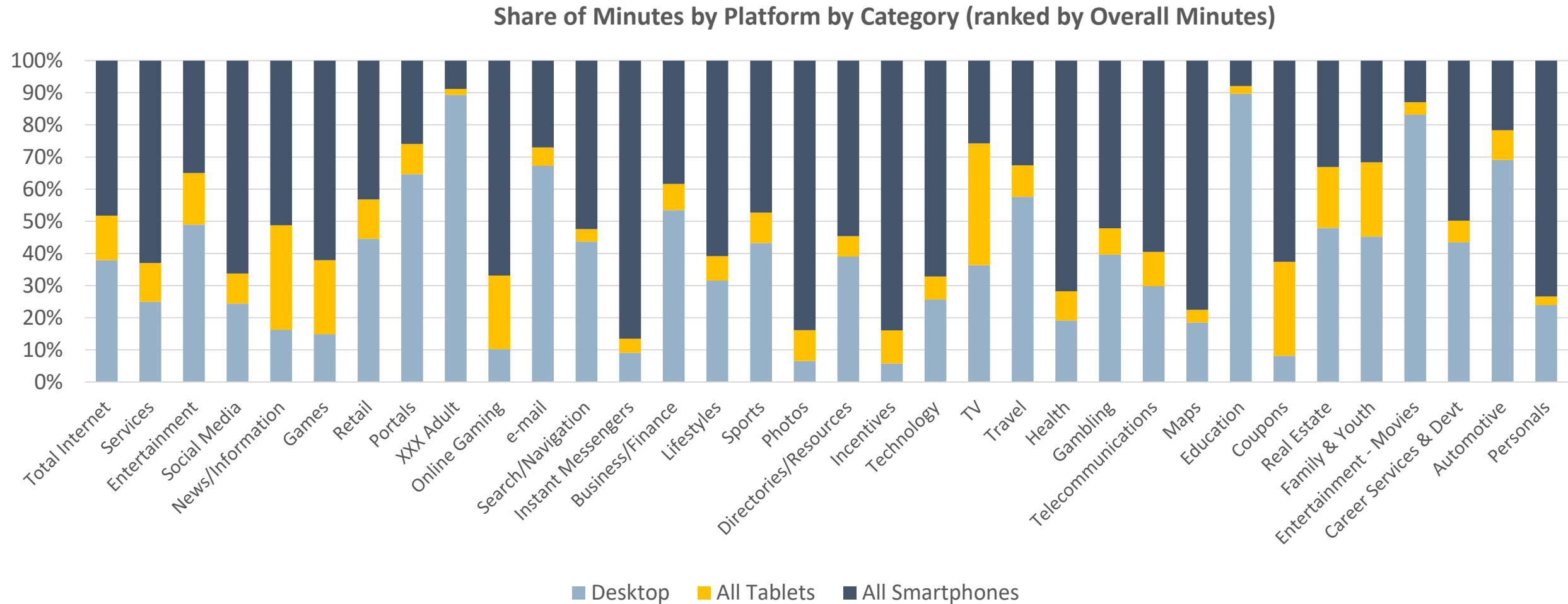


Instant Messaging, Social Media, Gaming & News have a greater share of minutes on smartphones than the desktop

Entertainment, Portals, Email and Adult sites have a higher share of desktop minutes than smartphone minutes

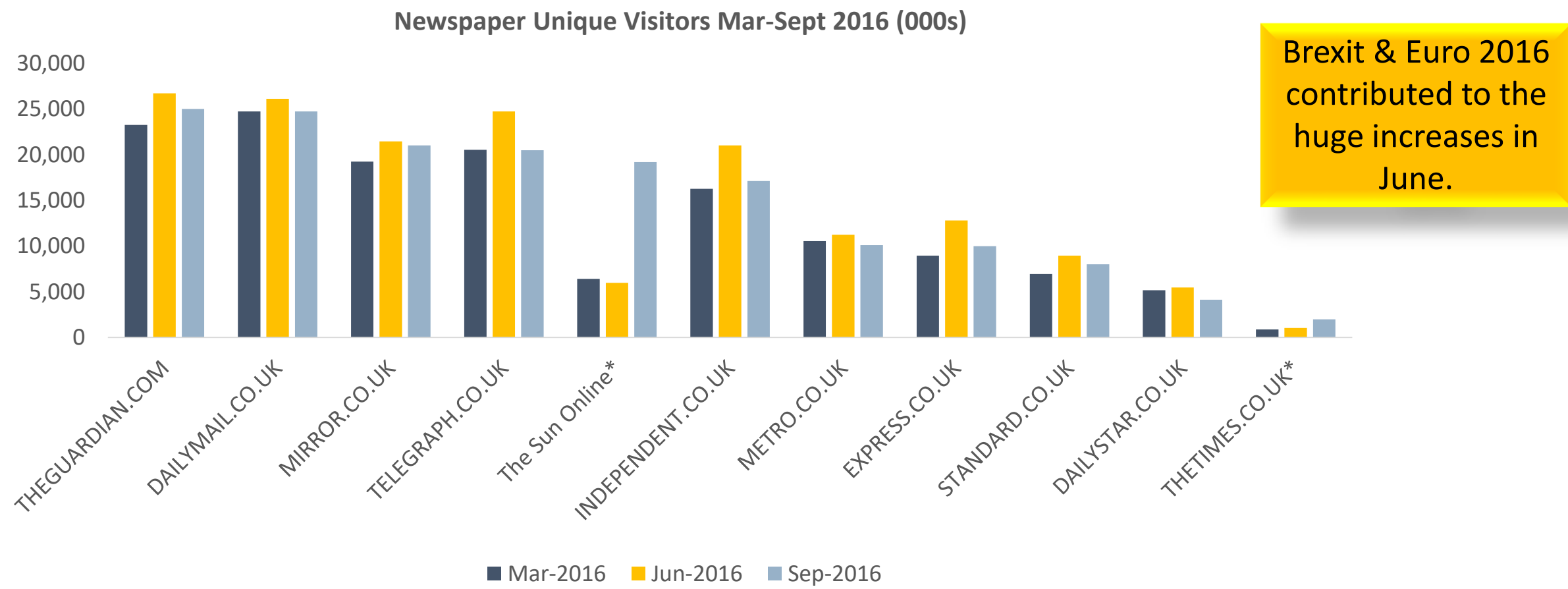
Platform Share of Minutes by Category

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



Change in National Newspaper Unique Visitors: Mar-Sept 2016

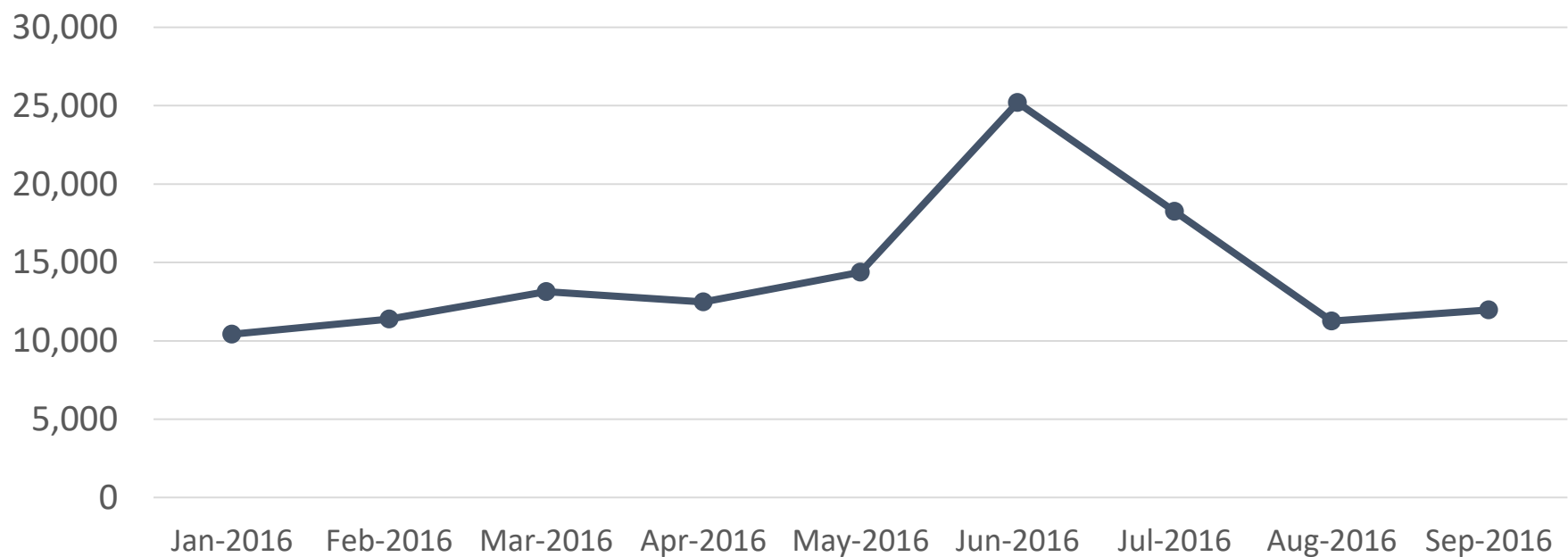
Although lower than June, audience are slightly higher than pre-Brexit levels



Unique Visitors to the Politics Category Jan-Sept 2016

Visitors to Political News returns to Pre-Brexit levels

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 but are down to 8.5 in Sept 2016

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, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, LinkedIn, Microsoft, MediaCorp, 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