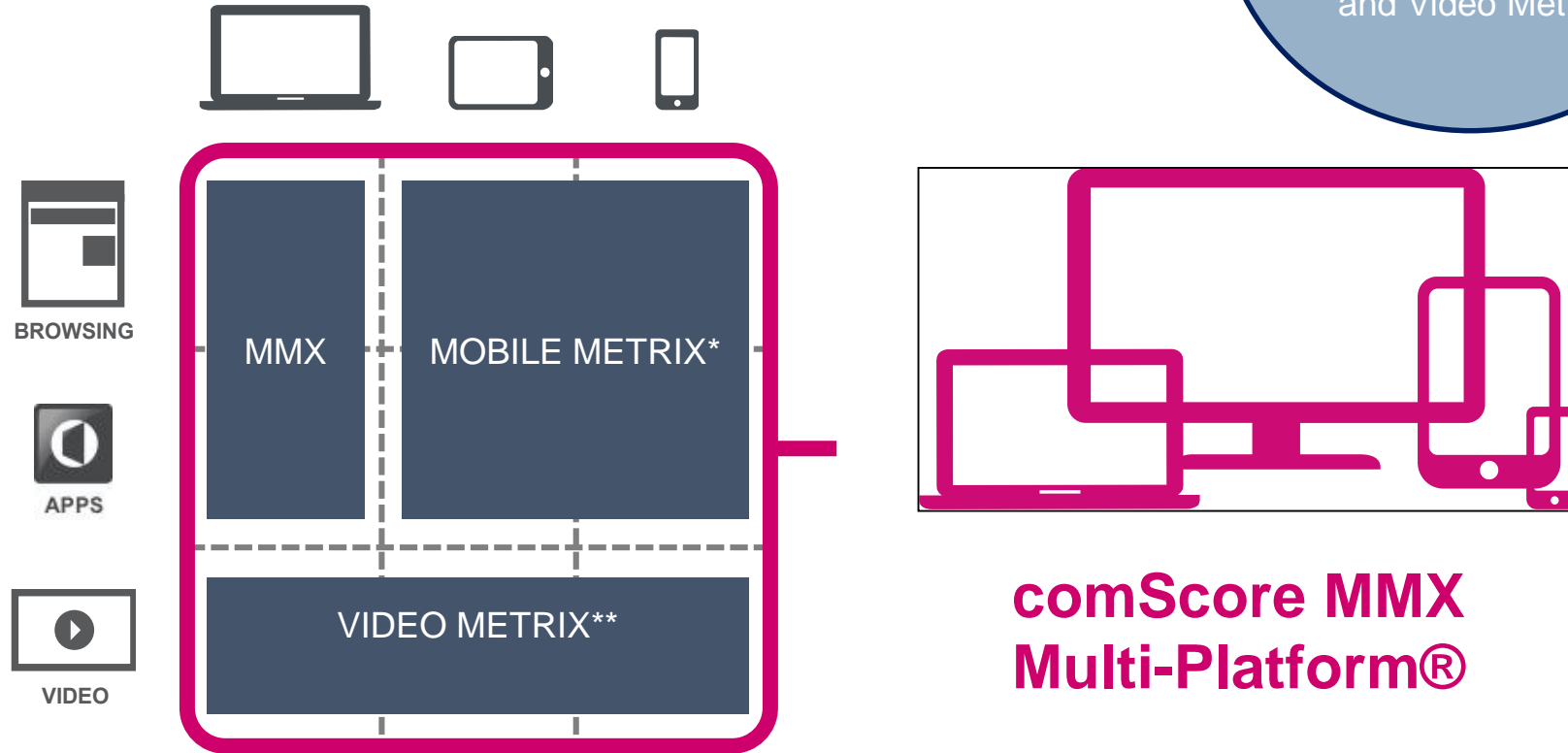# UK Digital Market Overview –December 2016

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

A Guide to Data Sources
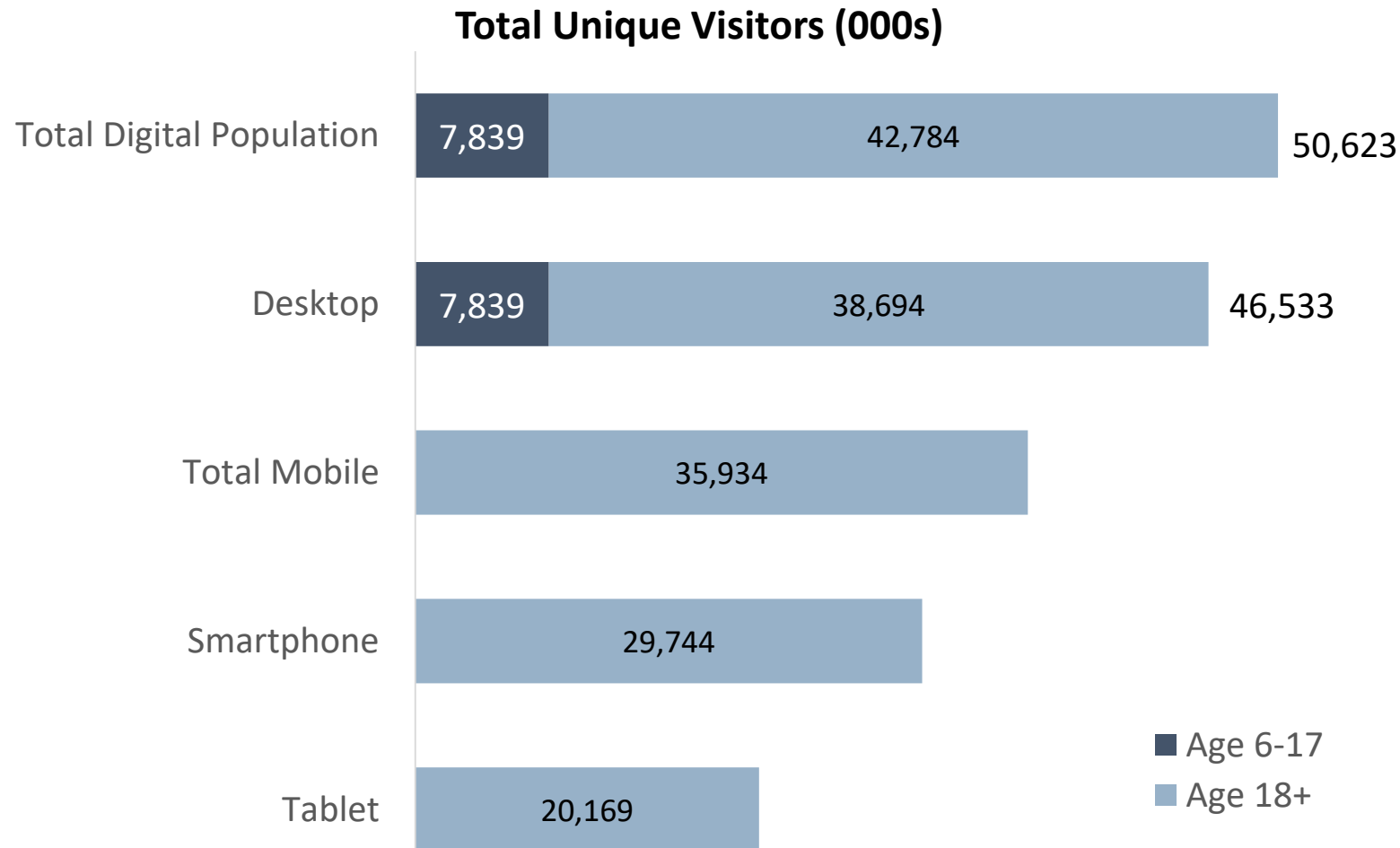
Total Digital Population = Unduplicated audience across MMX, Mobile Metrix and Video Metrix

BROWSING

APPS

VIDEO

MMX	MOBILE METRIX*
VIDEO METRIX**	

comScore MMX Multi-Platform®

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Unique Visitors and Share of Minutes by Platform
Although more adults use a PC, they spend more time on smartphones

Unique Visitors (000s) & Reach (%)
by Platform (18+)

Share of Minutes by Platform (18+)

Desktop: 38,694 — 90%
Smartphone: 29,744 — 70%
Tablet: 20,169 — 47%

All Tablets 16%
Desktop 34%
All Smartphones 50%
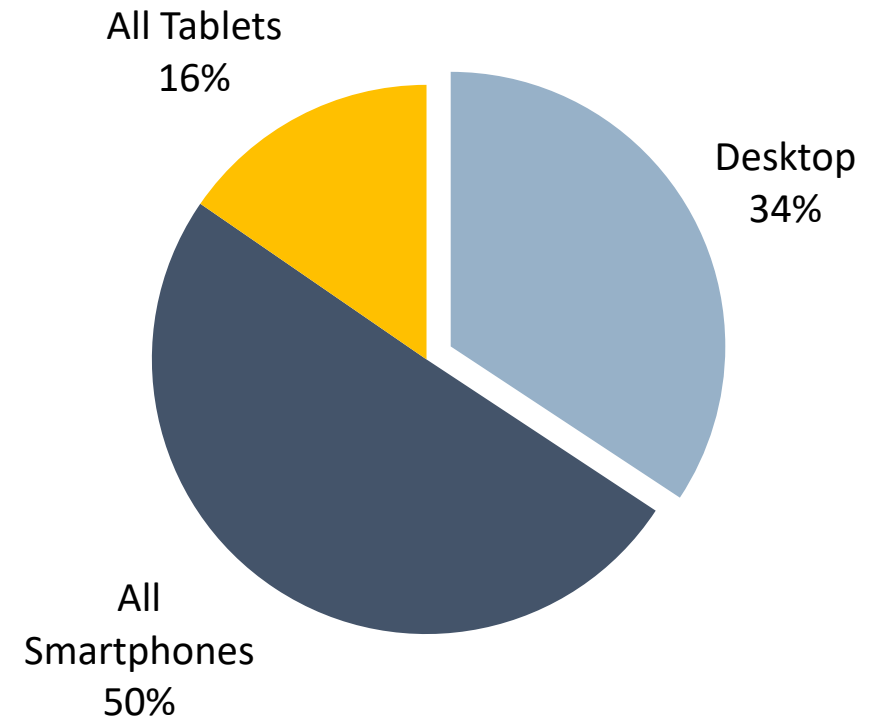
Source: comScore MMX Multi-Platform, Dec 2016, UK Adults 18+

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.

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Change in Share of Minutes by Platform Sep to Dec 2016
Mobile's Share of Minutes continues to increase

Share of Minutes by Platform (18+)

Sep 2016

Dec 2016
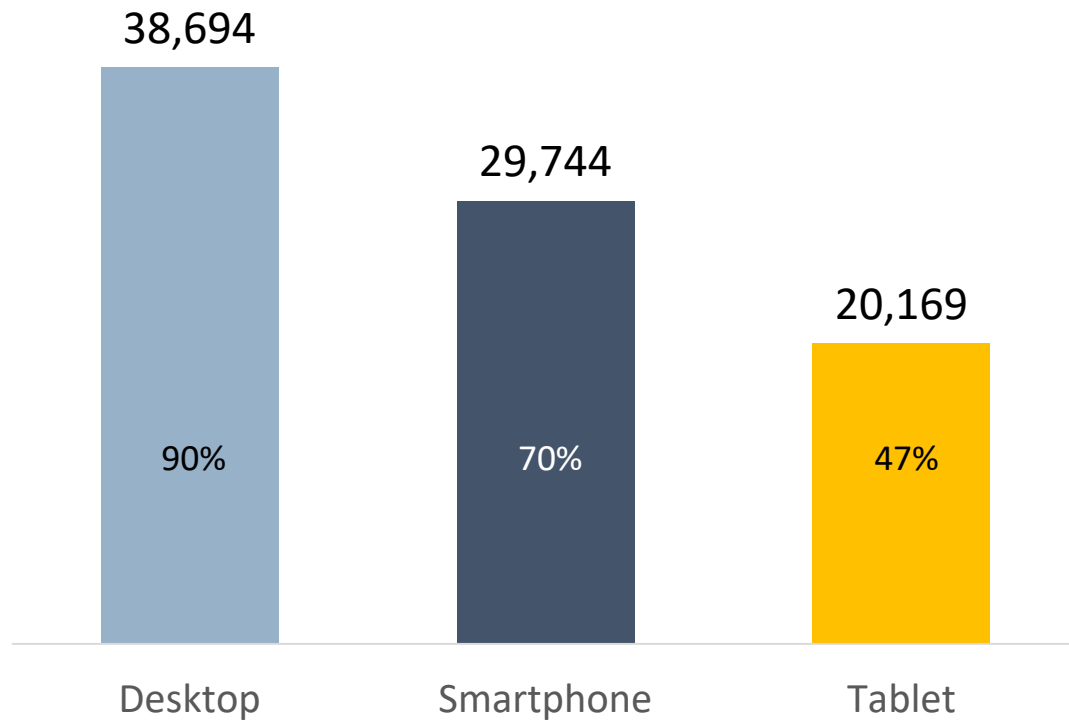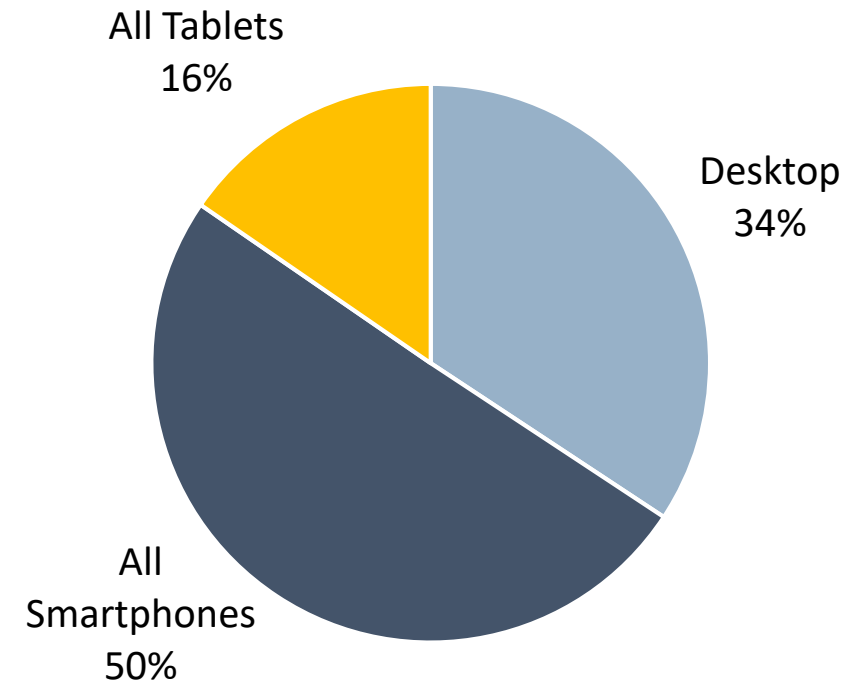

Source: comScore MMX Multi-Platform, Sep 2016 & Dec 2016, UK

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 Jan to Dec 2016
Mobile's Share of Minutes continues to increase

Share of Minutes by Platform (18+)

Legend: Smartphones — Tablet — Desktop

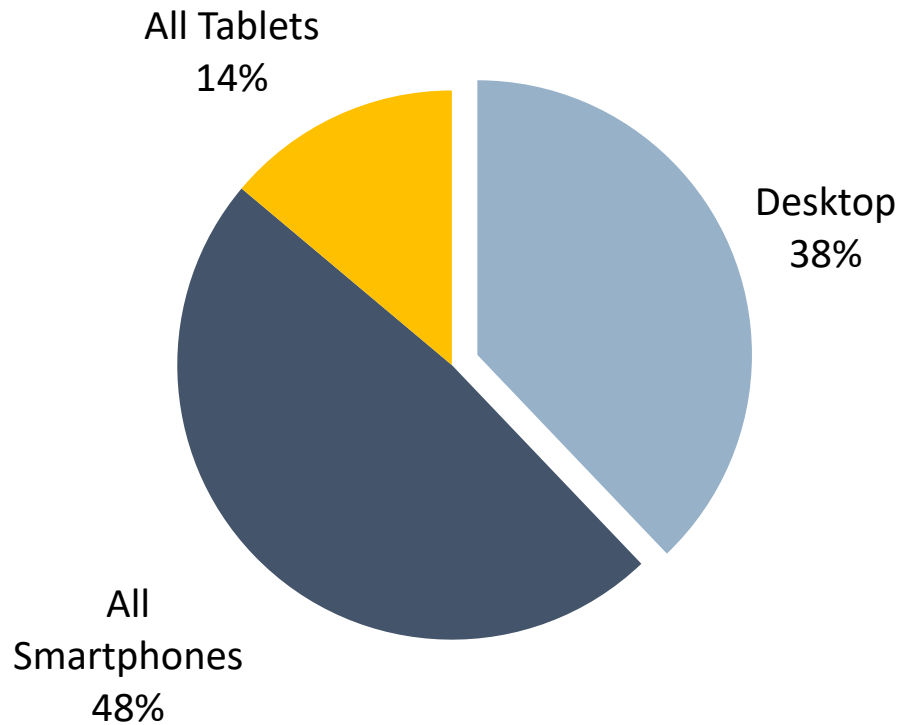Source: comScore MMX Multi-Platform, 2016, UK

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.

Desktop Minutes Among Adults across 2016
Mobile has boosted digital minutes rather than replaced the desktop

Total Minutes by Platform (MM) among Adults (18+)

Additional Mobile Minutes

Legend: ■ Desktop ■ Mobile

X-axis: Jan-2016, Feb-2016, Mar-2016, Apr-2016, May-2016, Jun-2016, Jul-2016, Aug-2016, Sep-2016, Oct-2016, Nov-2016, Dec-2016

Y-axis: 0, 50,000, 100,000, 150,000, 200,000, 250,000, 300,000

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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

Legend: ■ Desktop ■ All Smartphones ■ All Tablets

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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

Demographic	Desktop-Only UV	Mobile-Only UV	Multi-Platform
18+	16%	10%	74%
18-24	11%	12%	77%
25-34	13%	12%	75%
35-44	14%	11%	76%
45-54	14%	8%	78%
55+	25%	6%	68%
Males: 18+	16%	7%	77%
Females: 18+	16%	12%	72%

■ Desktop-Only UV   ■ Mobile-Only UV   ■ Multi-Platform

12% of 18-24s do not use a desktop PC to access the internet
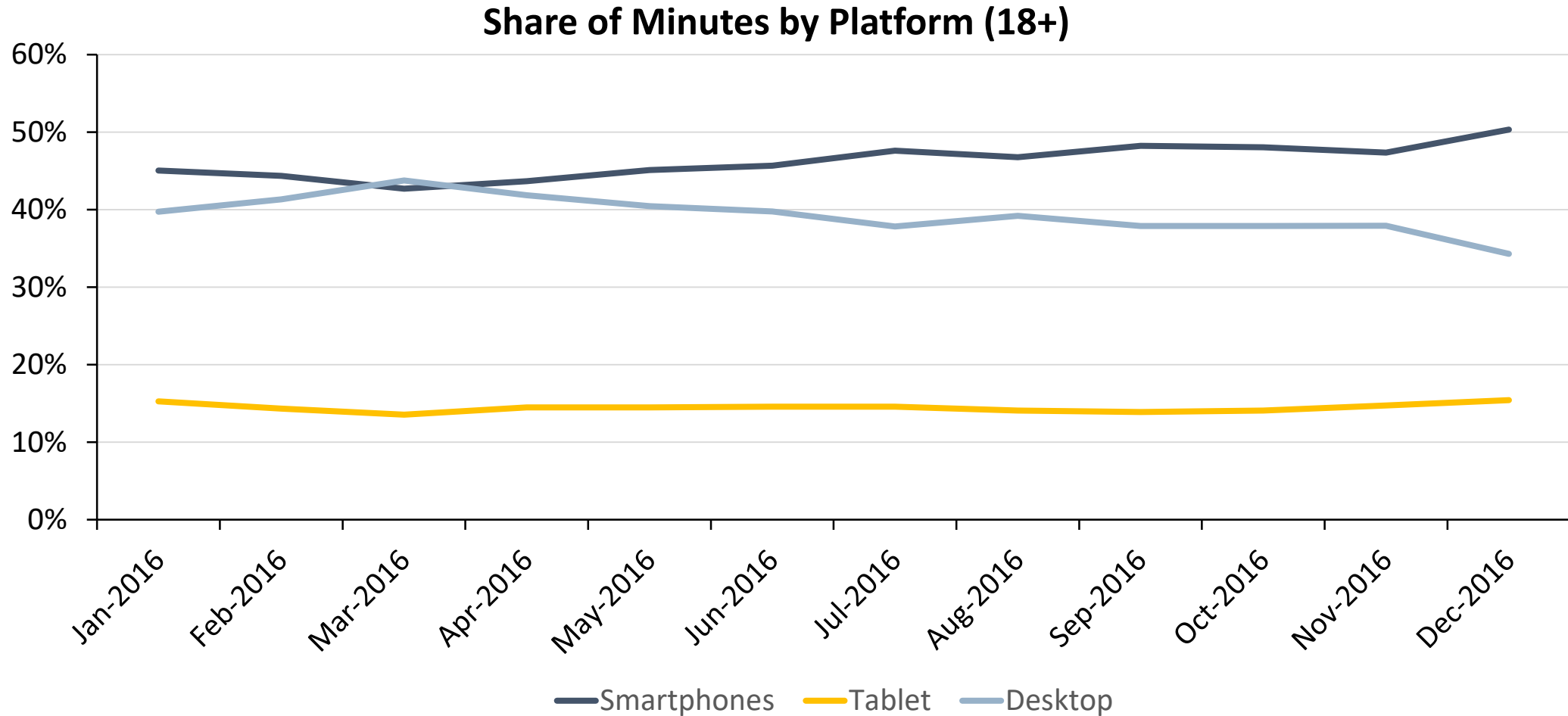
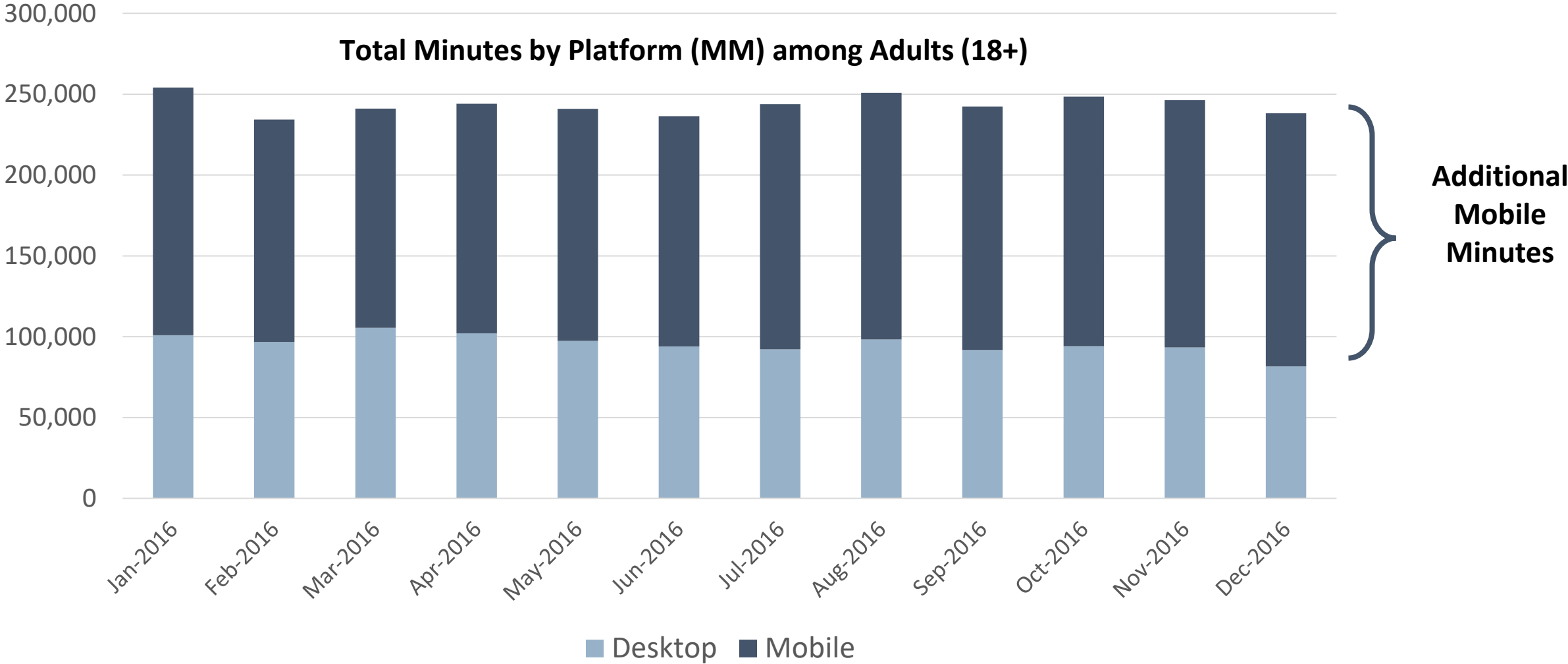A quarter (25%) of over 55s **ONLY** use the desktop/laptop

Source: comScore MMX Multi-Platform, Dec 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.

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Platform Share by Unique visitors by Social Class
Highest and Lowest Social Class least likely to be Multi-Platform

Unique Viewers by Platform by Social Class

Social Class	Desktop-Only UV	Mobile-Only UV	Multi-Platform
A - Upper Middle Class	34%	6%	61%
B - Middle Class	21%	3%	75%
C1 - Lower Middle Class	11%	7%	81%
C2 - Skilled Working Class	15%	14%	71%
D - Working Class	15%	11%	74%
E - Those at Lowest Level of Subsistence	5%	31%	64%

■ Desktop-Only UV   ■ Mobile-Only UV   ■ Multi-Platform
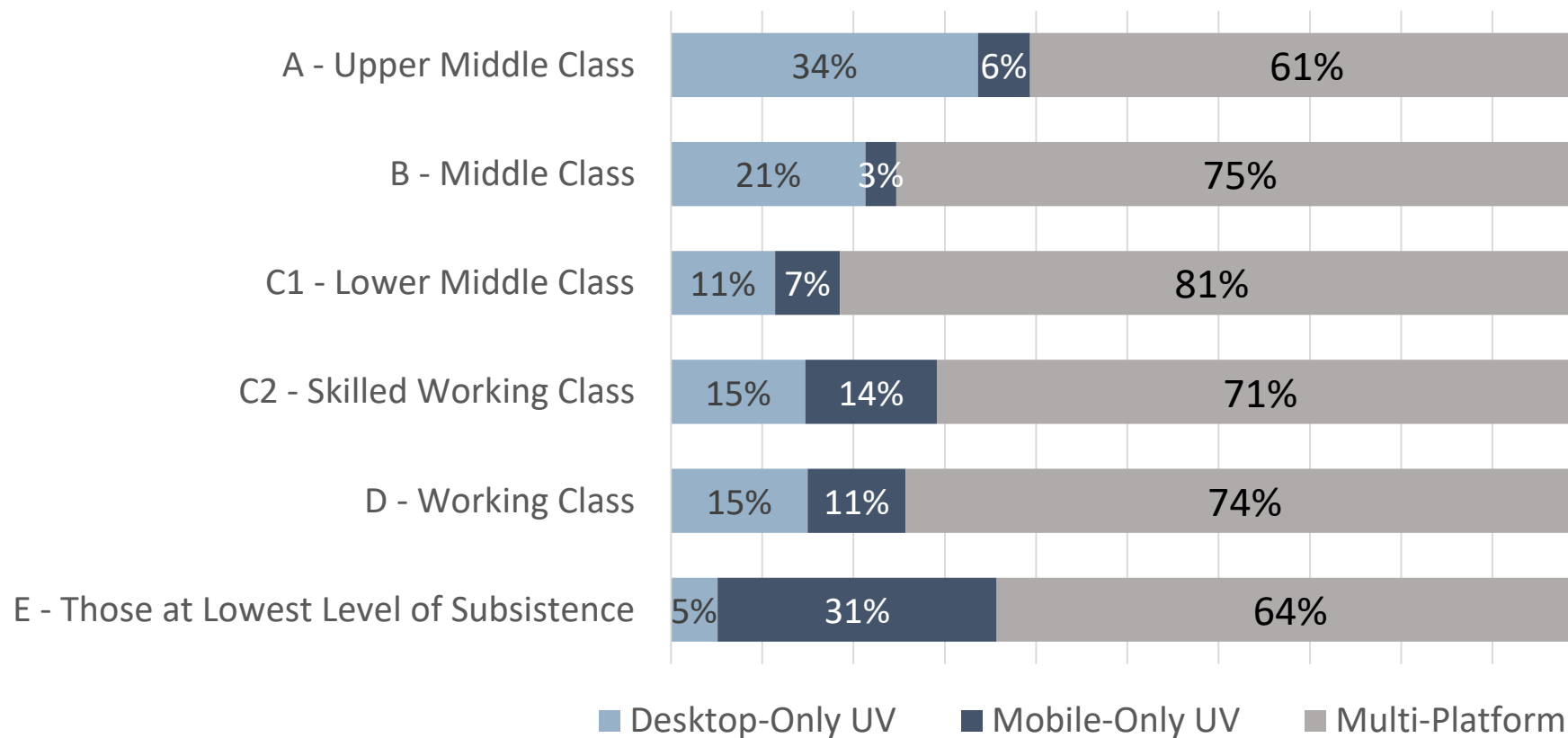
34% of social class A only use a desktop PC to access the internet

Lower social classes are more likely to ONLY use a mobile to access the internet
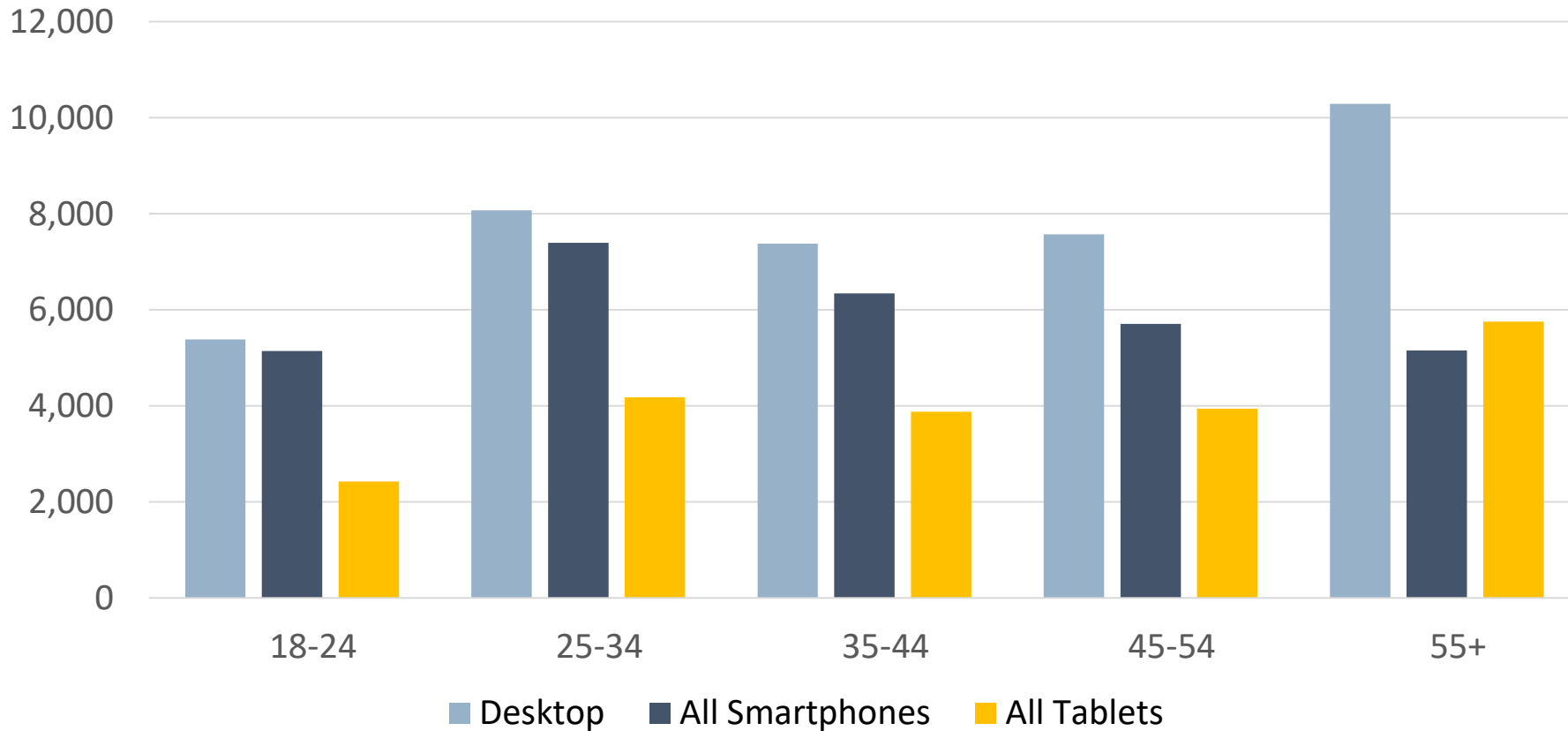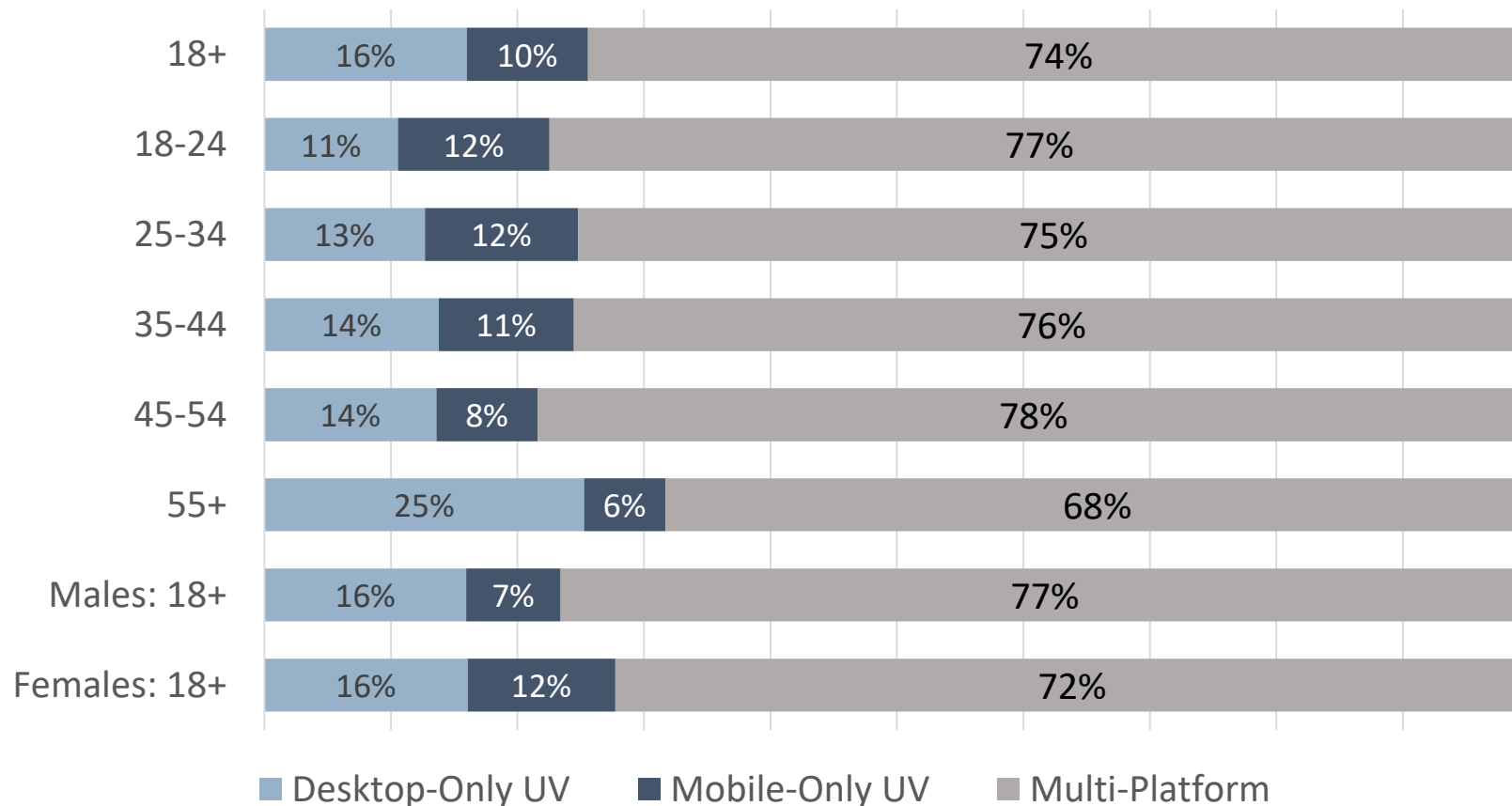
Source: comScore MMX Multi-Platform, Dec 2016, UK

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.

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Platform Share of Minutes by Demographic
Millennials & females spend the greatest share of their time on mobile devices

Share of Minutes

Demographic	All Smartphones	All Tablets	Desktop
Total Audience:18+	50%	15%	34%
Males: 18+	47%	13%	39%
Females: 18+	54%	18%	28%
18-24	65%	10%	25%
25-34	57%	13%	30%
35-44	52%	15%	33%
45-54	44%	15%	40%
55+	31%	24%	45%

■ All Smartphones ■ All Tablets ■ Desktop
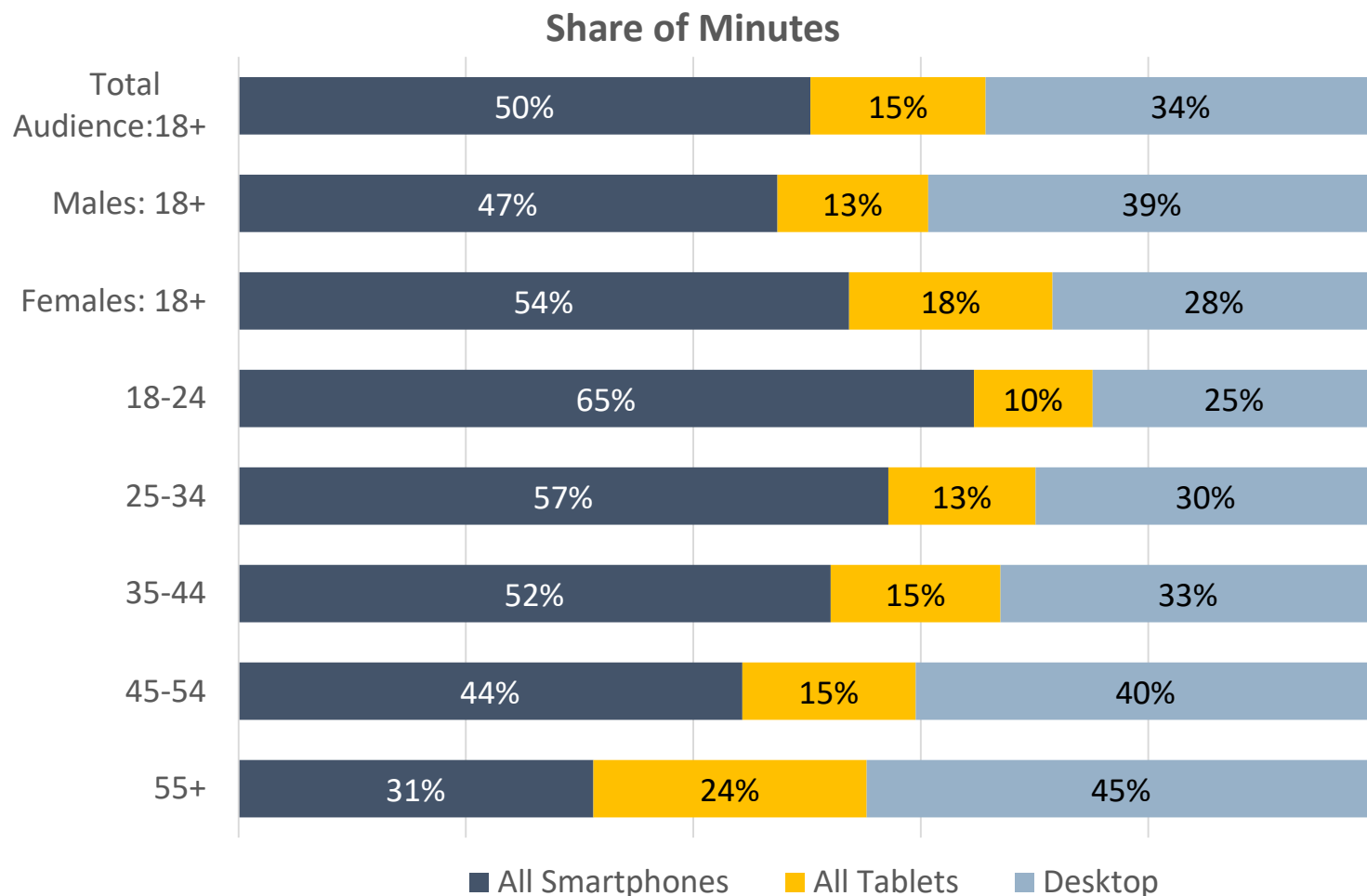
Females 18+ spend 72% of their time online on mobile devices compared to only 60% for males. The smartphone takes the lion's share of minutes for females 18+.

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

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Over 4m adults did not use a desktop/laptop to access the internet
10% are now 'Mobile Only' – this is higher among younger audiences & females

Uvs (000s)

%

Mobile Only Unique Visitors & % of Total

Category	Mobile-Only UV (000)	%
18+	4,089	10%
18-24	732	12%
25-34	1,109	12%
35-44	882	11%
55+	706	6%
Males: 18+	1,597	7%
Females: 18+	2,493	12%

Mobile-Only UV (000) —— Mobile-Only UV

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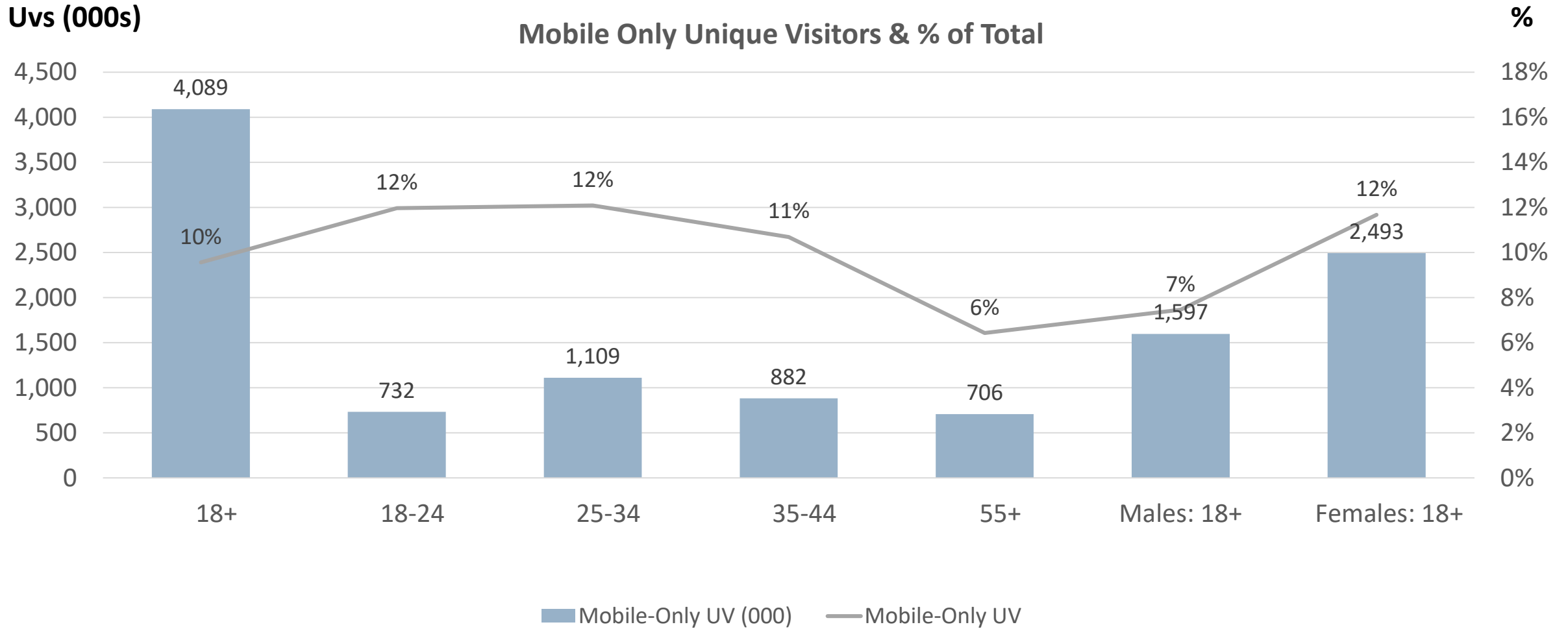
Top Properties – Total Digital Population

Top 20 Properties by 'Unique Visitors' - Total Digital Population (TDP)
Home Retail Group (Argos) and Tesco enter the top 20 in December

Total Unique Visitors/Viewers (000s)

Property	Visitors
Google Sites	48,522
Facebook	40,269
Microsoft Sites	39,607
Amazon Sites	38,030
BBC Sites	37,167
eBay	30,104
Yahoo Sites	29,268
Sky Sites	28,716
Trinity Mirror Group	28,713
Apple Inc.	27,127
Mail Online / Daily Mail	26,993
Wikimedia Foundation Sites	23,320
TripAdvisor Inc.	23,089
News UK Sites	22,853
PayPal	22,287
Home Retail Group	21,111
Linkedin	20,988
Twitter	20,768
The Guardian	20,395
Tesco Stores	18,934

The top 4 all have an online reach of over 75%. Google extends it's reach to 95.9%

The AOL & Microsoft display advertising sales partnership gives AOL a combined audience of 36m or 71.2% reach in Sept

ESI Media and Telegraph fall out of top 20

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Audience Breakdown of Top 3 Sites
Google's audience increased by 5% – adding over 2 million visitors since Sept

Total Unique Visitors (000s)

Site	Total Unique Visitors (000s)
Google Sites	48,522
Youtube.com	41,515
Google Search	38,122
Google Maps	27,871
Google Gmail	23,763
Android.com	15,711
Google+	10,842
Blogger	9,869
Google Shopping	8,873
Facebook	40,269
Facebook.com	39,545
Messenger.com	23,545
Instagram.com	18,659
WhatsApp	18,063
Microsoft Sites	39,607
Bing	28,041
MSN Content Sites	21,555
Outlook (Outlook.com)	15,992
Microsoft.com	11,711
Microsoft Office	10,445
Skype	9,398

95.9% of the UK online population used Google Sites in Dec 2016, an uplift of 5% since September. Google shopping (+1.5m) and Youtube (+2.3m) have contributed to this uplift

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Key Unique Visitor Changes Sept-Dec 2016: Top 20 Properties
Online retailers Home Retail Group (Argos) and Tesco witnessed most growth

Change in Visitors (000s) Sep 2016 - Dec 2016

Property	Change
Google Sites	2129
Facebook	903
Microsoft Sites	415
Amazon Sites	1434
BBC Sites	337
eBay	-237
Yahoo Sites	-3445
Sky Sites	926
Trinity Mirror Group	991
Apple Inc.	-183
Mail Online / Daily Mail	-145
Wikimedia Foundation Sites	-712
TripAdvisor Inc.	-3297
News UK Sites	2394
PayPal	2121
Home Retail Group	4573
Linkedin	-1397
Twitter	-123
The Guardian	-4628
Tesco Stores	3339

The top 5 all grew audience between Sept and Dec, with Google being the strongest performer

Ecommerce sites - Amazon, Tesco, Home Retail Group & Paypal all experienced uplifts

Source: comScore MMX Multi-Platform, Dec 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
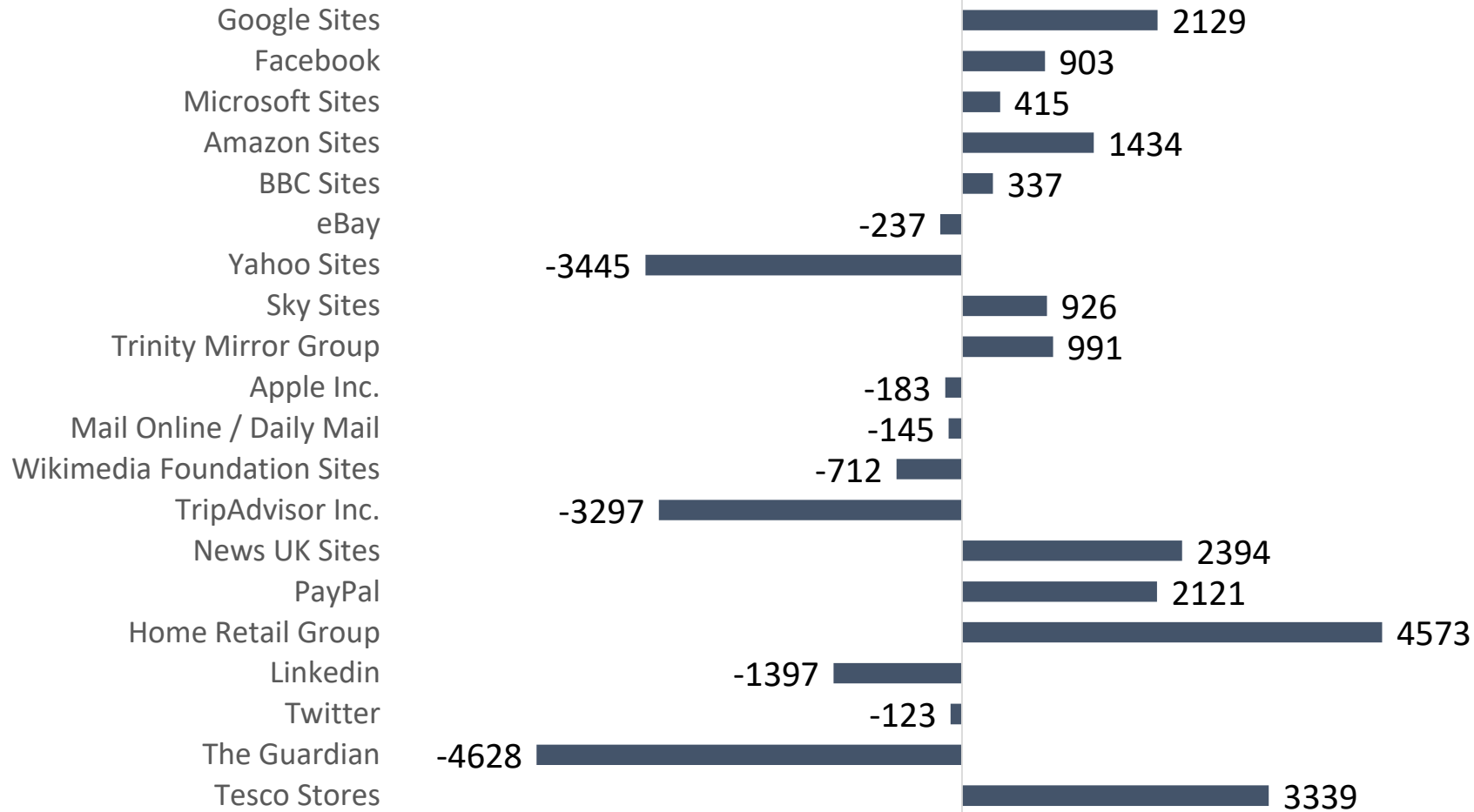
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Top 20 Properties by 'Time Spent*' – Total Digital Population (TDP)
Snapchat enters the top 10, Spotify now in top 5*

Total Mins (MM) – Total Market = 238,210

Property	Total Mins (MM)
Google Sites	45,639
Facebook	32,922
BBC Sites	13,766
Apple Inc.	8,525
Spotify	7,901
Yahoo Sites	4,378
Microsoft Sites	4,188
Amazon Sites	4,125
eBay	3,931
Snapchat, Inc	3,061
Netflix Inc.	2,954
Sky Sites	2,318
Twitter	2,053
SOUNDCLOUD.COM	1,953
Mail Online / Daily Mail	1,830
Peak Games	1,408
Qihoo.com Sites	1,272
Activision Blizzard	1,195
Zynga	970
Niantic, Inc.	868

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

Social Media & Entertainment categories drive minutes. Snapchat enters the top 10 – users spent nearly 6.5 hours per month using the service.

*Following enhanced Audio Measurement, Spotify is now no.5 as users spend over 10 hrs per month listening

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Share of Adults' Time Online by Platform for Top 10 'Time Spent' Properties
Mobile devices account for over 90% of time spent on BBC, Apple, Spotify & Snapchat

Share Of Minutes
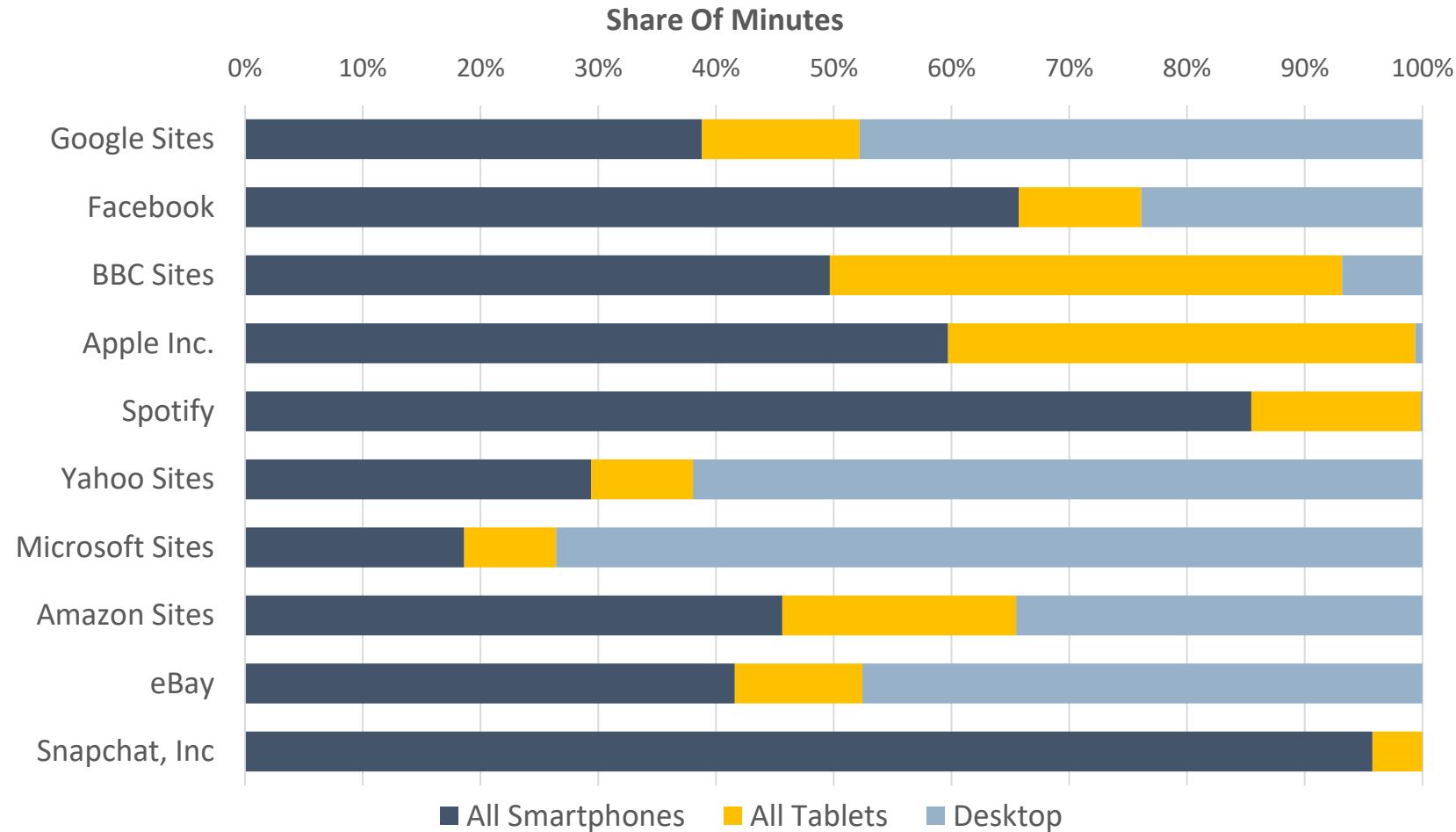
Snapchat, Apple & Spotify have the greatest share of time on mobile devices

BBC & Apple have highest Tablet share out of top 10

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

■ All Smartphones ■ All Tablets ■ Desktop

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Top Properties – Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors
36m adults accessed mobile content in Sept 2016 (via browser and app)

Total Unique Visitors/Viewers (000s) – Total Mobile (18+) = 35,934

Property	Unique Visitors (000s)
Google Sites	33,564
Facebook	32,548
BBC Sites	31,015
Amazon Sites	30,029
Trinity Mirror Group	25,187
Sky Sites	24,280
Mail Online / Daily Mail	22,201
News UK Sites	20,829
Apple Inc.	20,401
eBay	20,330
Microsoft Sites	18,400
TripAdvisor Inc.	18,060
Linkedin	17,210
Wikimedia Foundation Sites	16,366
The Guardian	16,362
Yahoo Sites	16,088
PayPal	15,883
Twitter	15,691
Independent & Evening Standard…	15,681
Gumtree Sites	13,632

Paypal re-enters the top 20 at the expense of the Telegraph Media Group

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Top 20 Mobile Properties ranked by minutes
Entertainment & Games sites more likely to feature in 'time online' top 20

Minutes (MM) – Total Mobile = 156,543

Property	Minutes (MM)
Facebook	25,056
Google Sites	23,820
BBC Sites	12,827
Apple Inc.	8,472
Spotify	7,889
Snapchat, Inc	3,061
Amazon Sites	2,701
eBay	2,061
Sky Sites	1,953
SOUNDCLOUD.COM	1,902
Twitter	1,778
Yahoo Sites	1,665
Peak Games	1,399
Mail Online / Daily Mail	1,328
Qihoo.com Sites	1,272
Activision Blizzard	1,123
Microsoft Sites	1,106
Netflix Inc.	989
Zynga	936
Niantic, Inc.	868

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

Source: comScore Mobile Metrix, Dect 2016, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
UKOM: Development Endorsement   *comScore enhanced measurement to include background 'audio' minutes drives
up audio services such as Spotify and Soundcloud from Sept 2016 data

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Share of Mobile Minutes by Access Type
4 in 5 mobile minutes come from applications

Share of Minutes by Platform

Mobile Web
17%

Mobile App
83%

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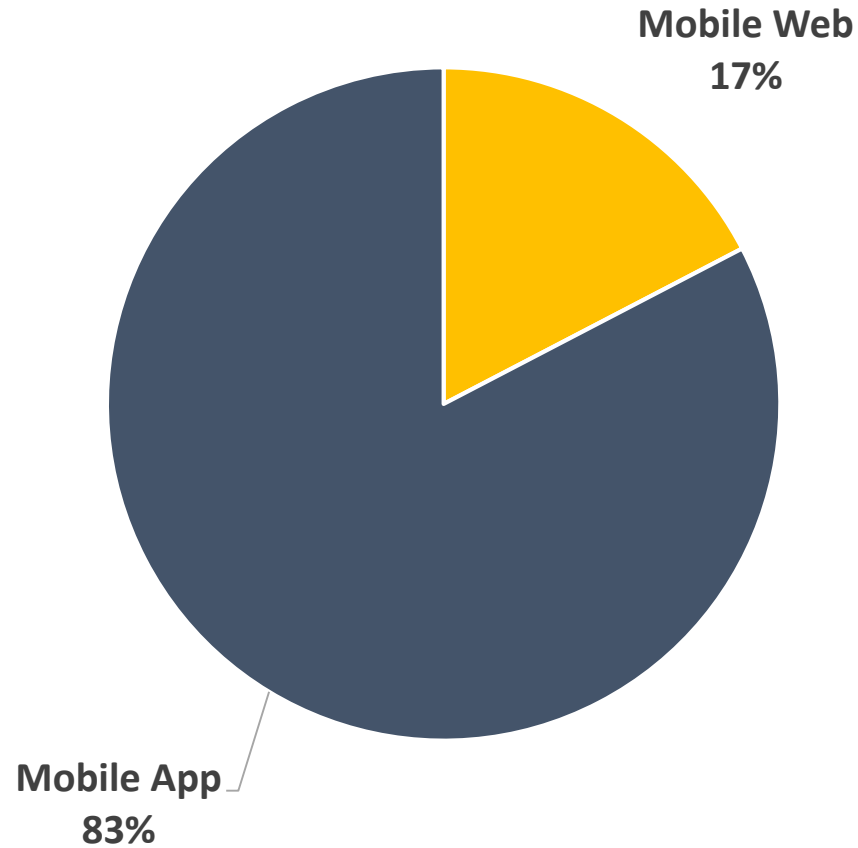
Top 20 Mobile Apps ranked by Unique Visitors
33.1m adults accessed a mobile app in Dec 2016

Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 33.1m

App	Unique Visitors (000s)
Facebook	25,788
Facebook Messenger	23,024
YouTube	21,013
WhatsApp Messenger	17,700
Google Search	15,334
Google Play	15,260
Google Maps	15,064
Amazon Mobile	14,196
Gmail	12,453
eBay	11,608
Apple Music	10,935
Instagram	10,743
Twitter	8,780
Google Calendar	8,756
Spotify	8,577
Snapchat	7,731
Apple Maps	6,925
Google Drive	6,357
BBC News	6,081
PayPal	5,165

The top 7 Apps are owned by Google or Facebook

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Categories

Major Categories Online – Unique Visitors v Minutes
Entertainment, Social Media & Games sites have high engagement

UVs & Mins by Category

Email, IM and Photos are a subset of Services

TV, Movies, Multimedia, Music are a subset of Entertainment

Legend: Total Unique Visitors/Viewers (000) — Total Minutes (MM)

Source: comScore MMX Multi-Platform, Dec 2016, UK, Desktop Age 6+, Mobile Age 18+
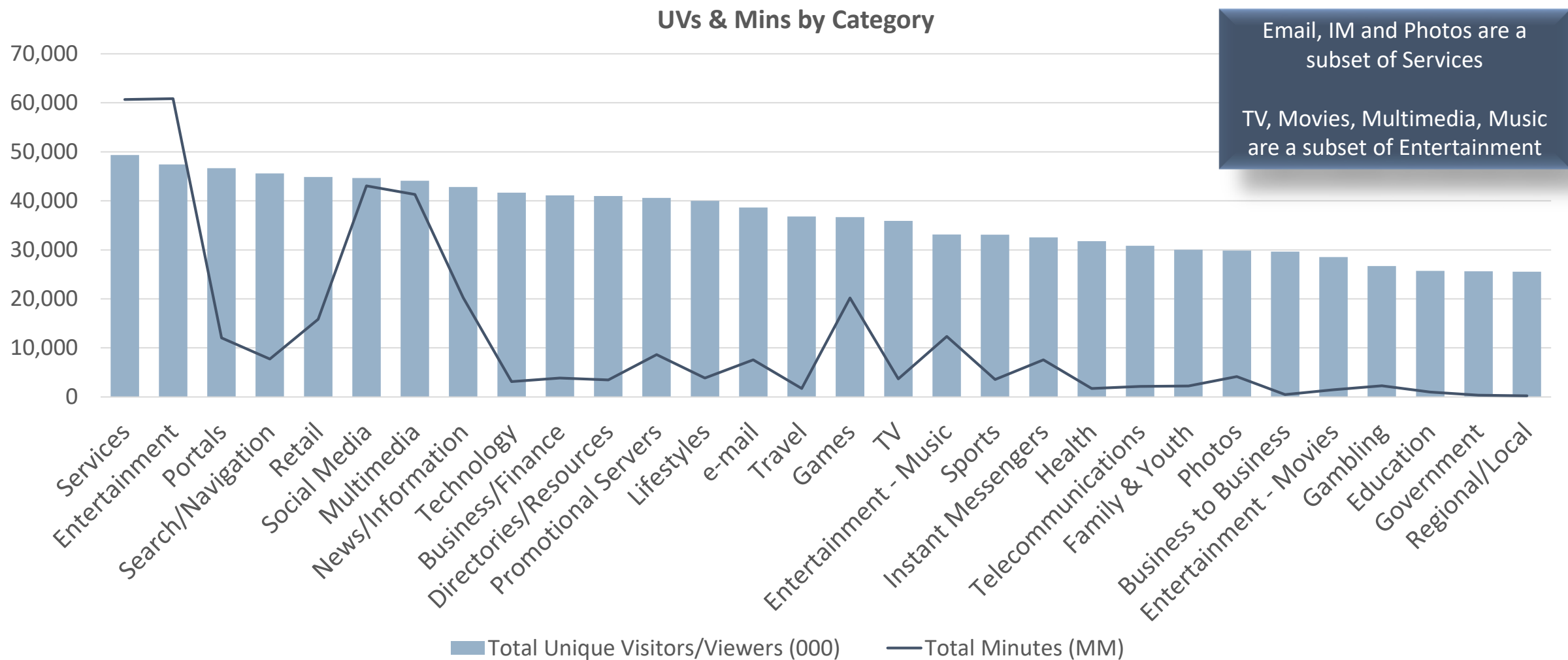
Platform Share of Minutes by Category
Desktop is still key for Adult, Email, Portals, Education, Autos & Government

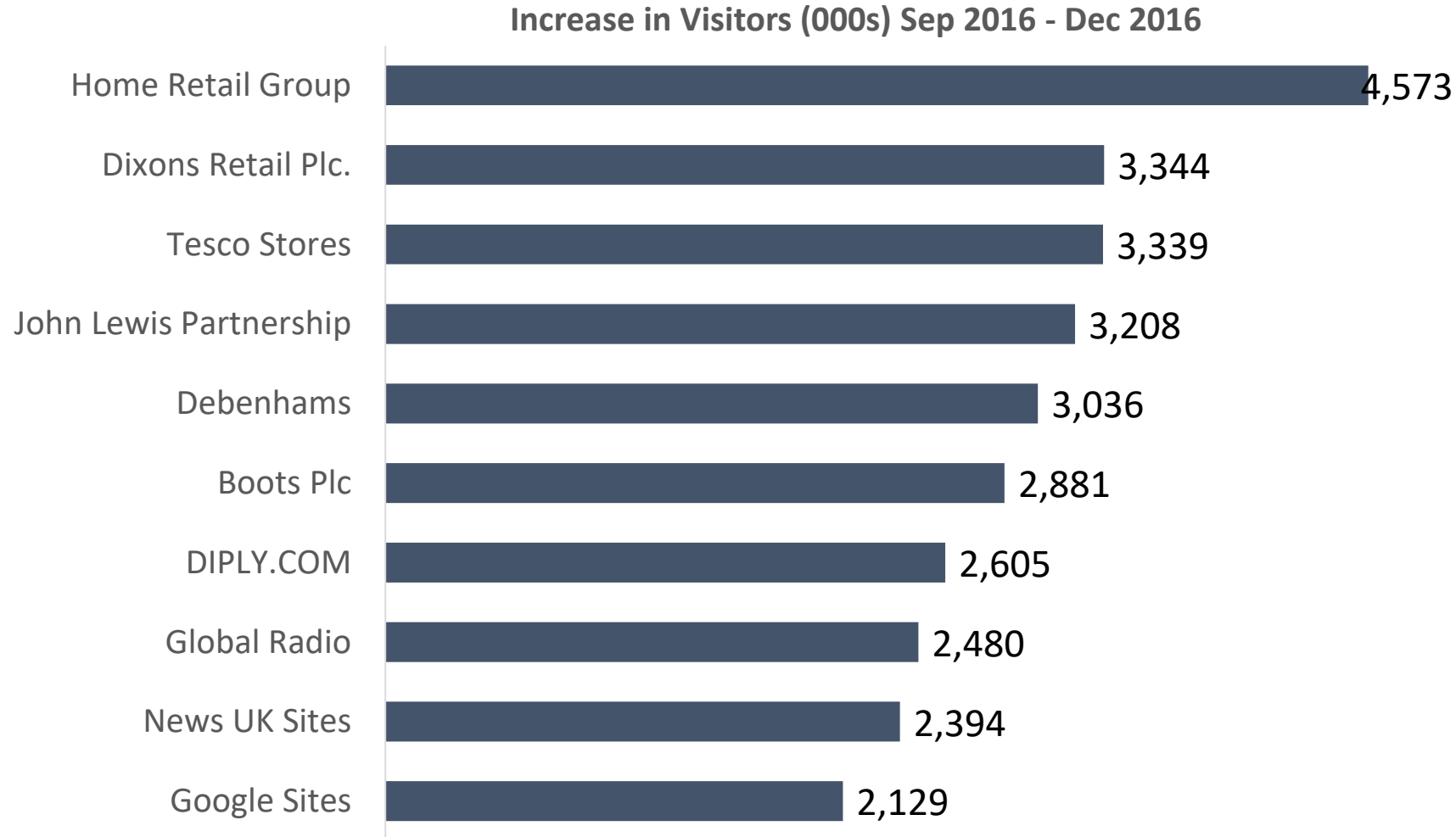**Share of Minutes by Platform by Category (ranked by Overall Minutes)**

Legend: ■ Desktop ■ All Tablets ■ All Smartphones

Categories (left to right): Total Internet: 18+, Services, Entertainment, Social Media, Multimedia, News/Information, Games, Retail, Entertainment - Music, Portals, XXX Adult, e-mail, Instant Messengers, Search/Navigation, Photos, Business/Finance, Lifestyles, TV, Sports, Directories/Resources, Technology, Gambling, Telecommunications, Travel, Health, Family & Youth, Entertainment - Movies, Coupons, Automotive, Education, Career Services and Development, Real Estate, Radio, Business to Business, Government, Regional/Local, ISP

Source: comScore MMX Multi-Platform, Dec 2016, UK, based on 18+

*Instant Messenger & Email are a subset of the Services category

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Top 10 Performers Sept-Dec 2016: Biggest Visitor Gains
Unsurprisingly, 6 of the top 10 are Online retailers

Increase in Visitors (000s) Sep 2016 - Dec 2016

Retailer	Increase in Visitors (000s)
Home Retail Group	4,573
Dixons Retail Plc.	3,344
Tesco Stores	3,339
John Lewis Partnership	3,208
Debenhams	3,036
Boots Plc	2,881
DIPLY.COM	2,605
Global Radio	2,480
News UK Sites	2,394
Google Sites	2,129

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Seasonality of the Online Retail Category – Jan-Dec 2016
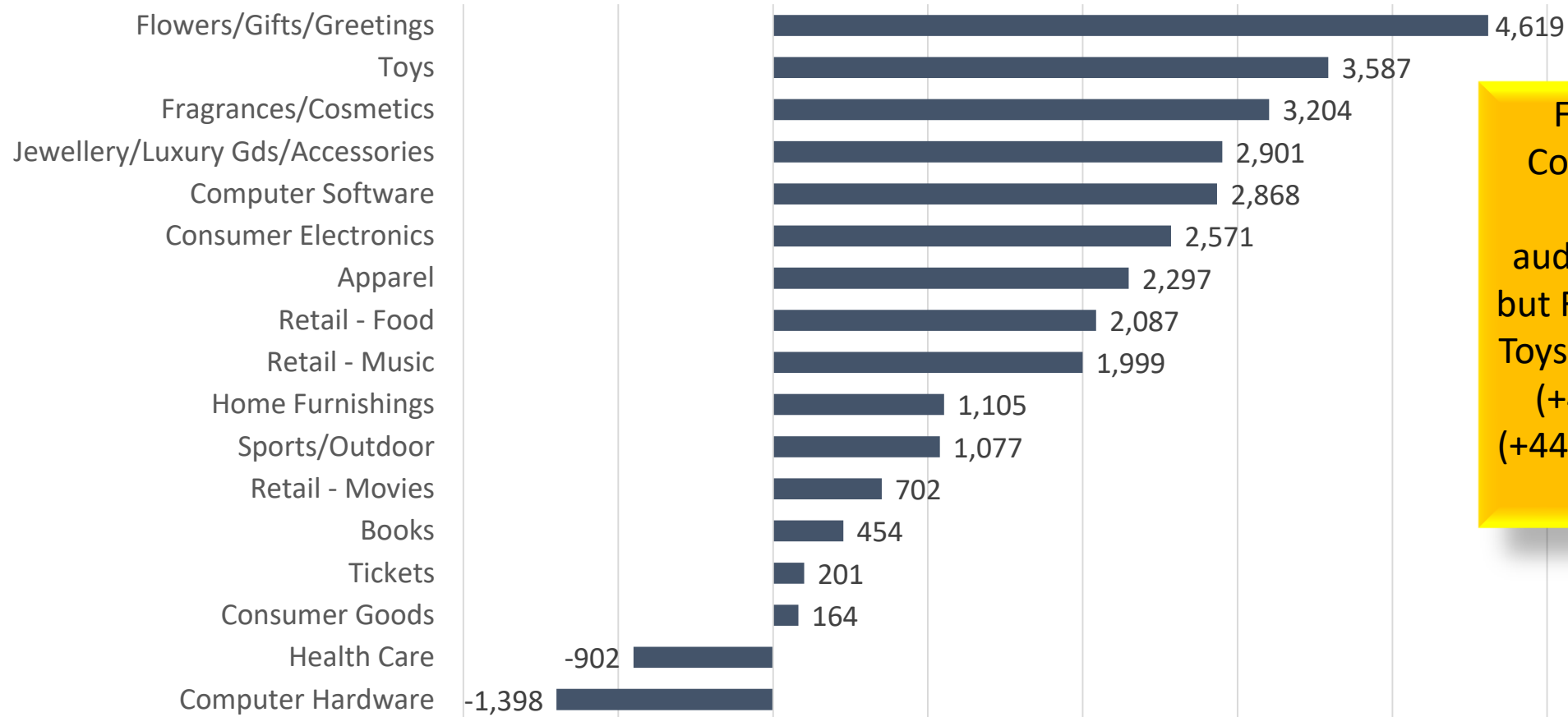## Retail Peaks during the Last quarter

Retail Peaks During the last Quarter

comScore
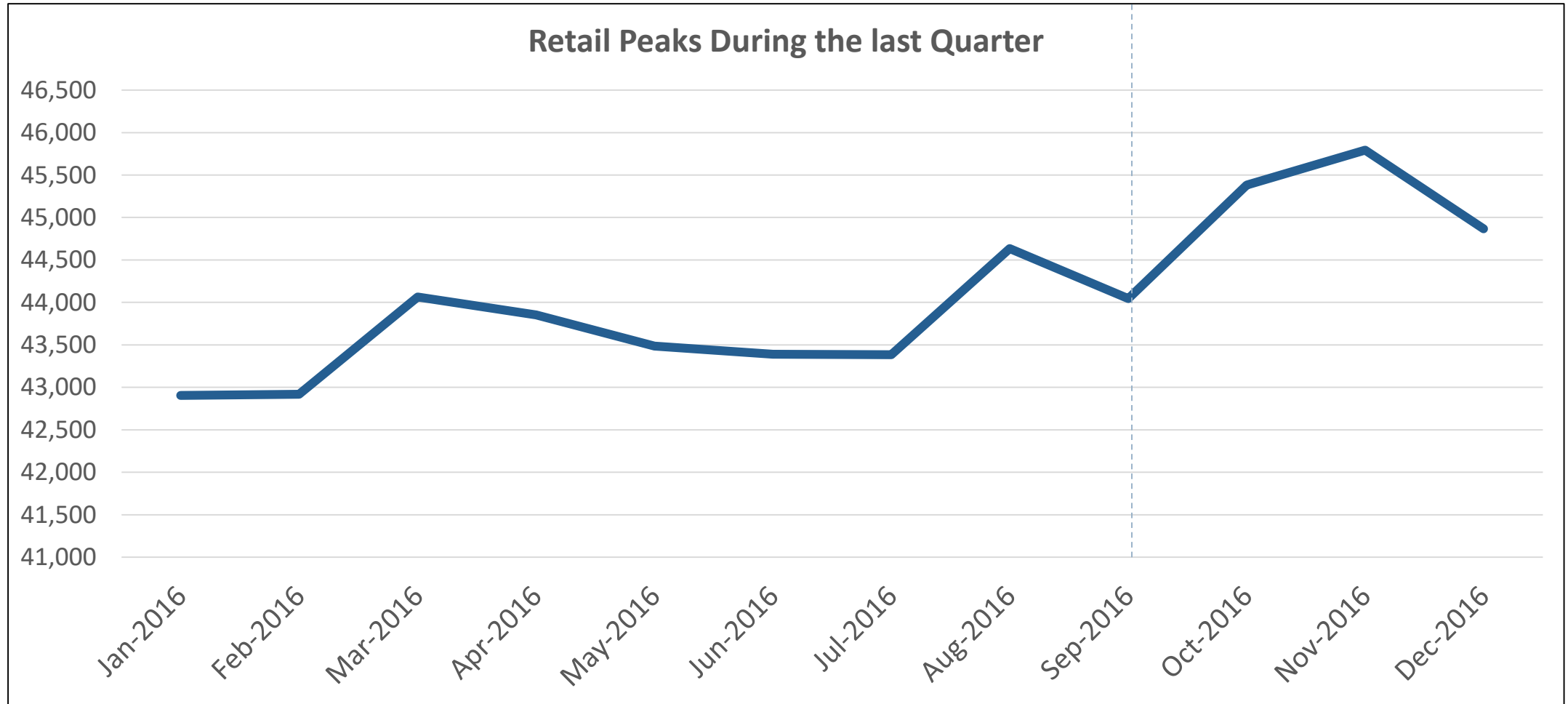
Retail Category* Growth – Unique Visitor Difference Dec 2016 v Sep 2016

Flower/Gifts/Greetings category saw a 70% uplift

Difference in Unique Visitors Dec 2016 v Sep 2016

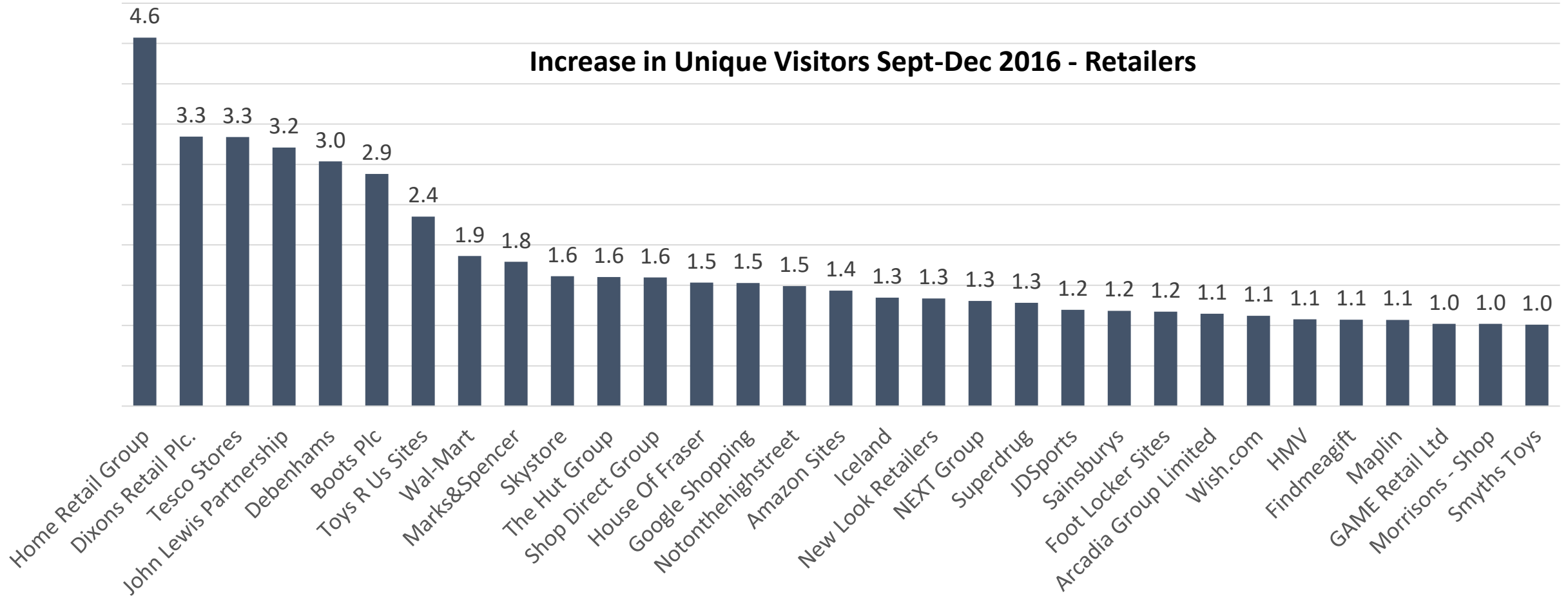| Category	Difference
Flowers/Gifts/Greetings	4,619
Toys	3,587
Fragrances/Cosmetics	3,204
Jewellery/Luxury Gds/Accessories	2,901
Computer Software	2,868
Consumer Electronics	2,571
Apparel	2,297
Retail - Food	2,087
Retail - Music	1,999
Home Furnishings	1,105
Sports/Outdoor	1,077
Retail - Movies	702
Books	454
Tickets	201
Consumer Goods	164
Health Care	-902
Computer Hardware	-1,398

Food, Apparel and Consumer Electronics had the biggest audiences in December but Flowers/Gifts (+70%), Toys (+55%), Music Retail (+49%) & Fragrances (+44%) had the biggest % growth

Source: comScore MMX Multi-Platform, Dec 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.

*Category relates to Category of Website and not retail Sales.

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Top performing Retail Sites based on Visitor Growth Sept-Dec 2016
## Over 30 retailers increased visitors by over 1 million

Increase in Unique Visitors Sept-Dec 2016 - Retailers

Retailer	Value
Home Retail Group	4.6
Dixons Retail Plc.	3.3
Tesco Stores	3.3
John Lewis Partnership	3.2
Debenhams	3.0
Boots Plc	2.9
Toys R Us Sites	2.4
Wal-Mart	1.9
Marks&Spencer	1.8
Skystore	1.6
The Hut Group	1.6
Shop Direct Group	1.6
House Of Fraser	1.5
Google Shopping	1.5
Notonthehighstreet	1.5
Amazon Sites	1.4
Iceland	1.3
New Look Retailers	1.3
NEXT Group	1.3
Superdrug	1.3
JDSports	1.2
Sainsburys	1.2
Foot Locker Sites	1.2
Arcadia Group Limited	1.1
Wish.com	1.1
HMV	1.1
Findmeagift	1.1
Maplin	1.1
GAME Retail Ltd	1.0
Morrisons - Shop	1.0
Smyths Toys	1.0

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UKOM Insights Updates
(updates from UKOM Insights Newsletter articles)

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Unique Visitors to the Politics Category Jan-Dec 2016
Brexit & the US Election contributed to peaks in June and November 2016

Total Unique Visitors/Viewers (000)
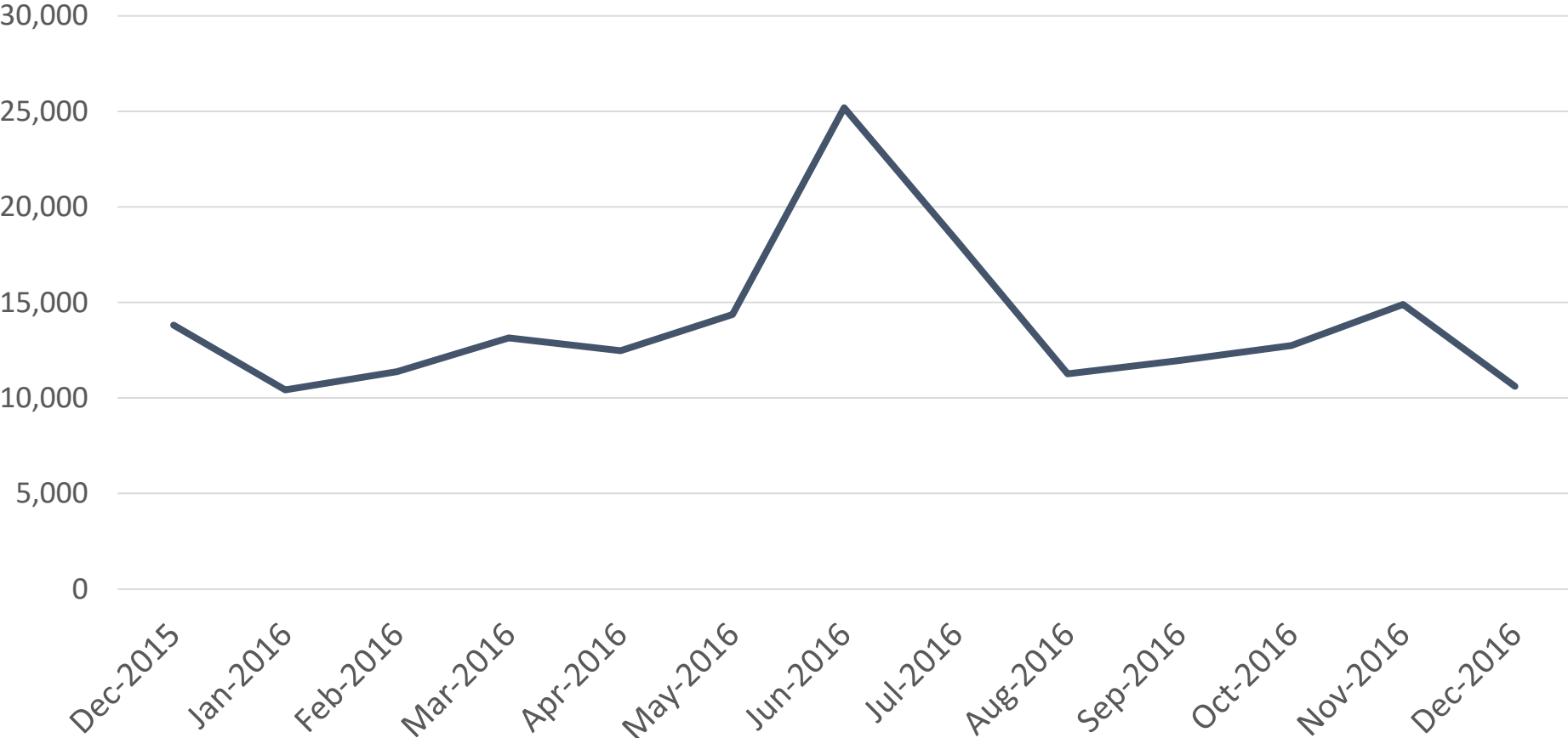
Reach increased by 25.9% points between May and June 2016

The US election contributed to a 2.1m uplift in UVs between October and November

Source: comScore MMX Multi-Platform, News Information – Politics category, age 18+.
Click here for original article: http://www.ukom.uk.net/uploads/files/UKOM_Insights_How_major_votes_impact_consumption_of_political_news_online.pdf

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Unique Visitors to Uber and Pokémon Go
Uber and Pokémon Go Audiences continue to head in different directions

Uber Unique visitors (000s)
Jan 2016 - Dec 2016

Pokémon Go Unique visitors (000s)
July 2016 - Dec 2016
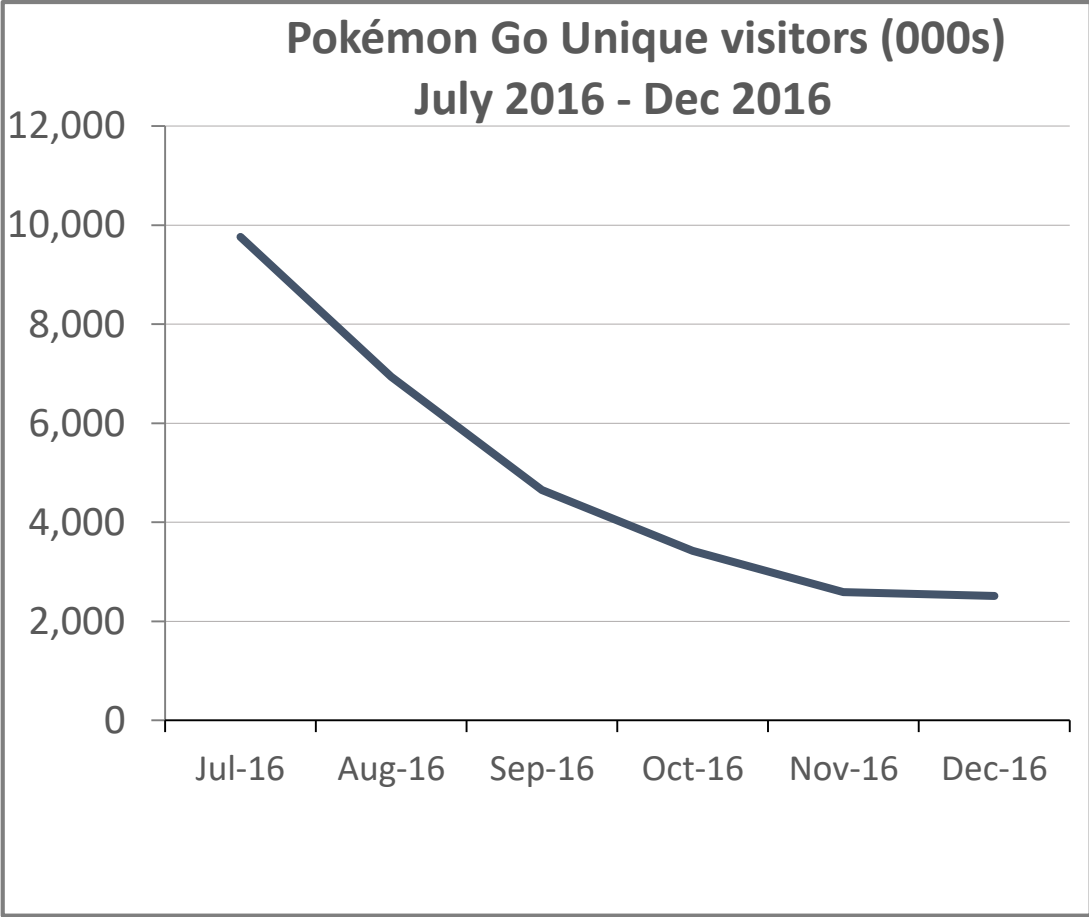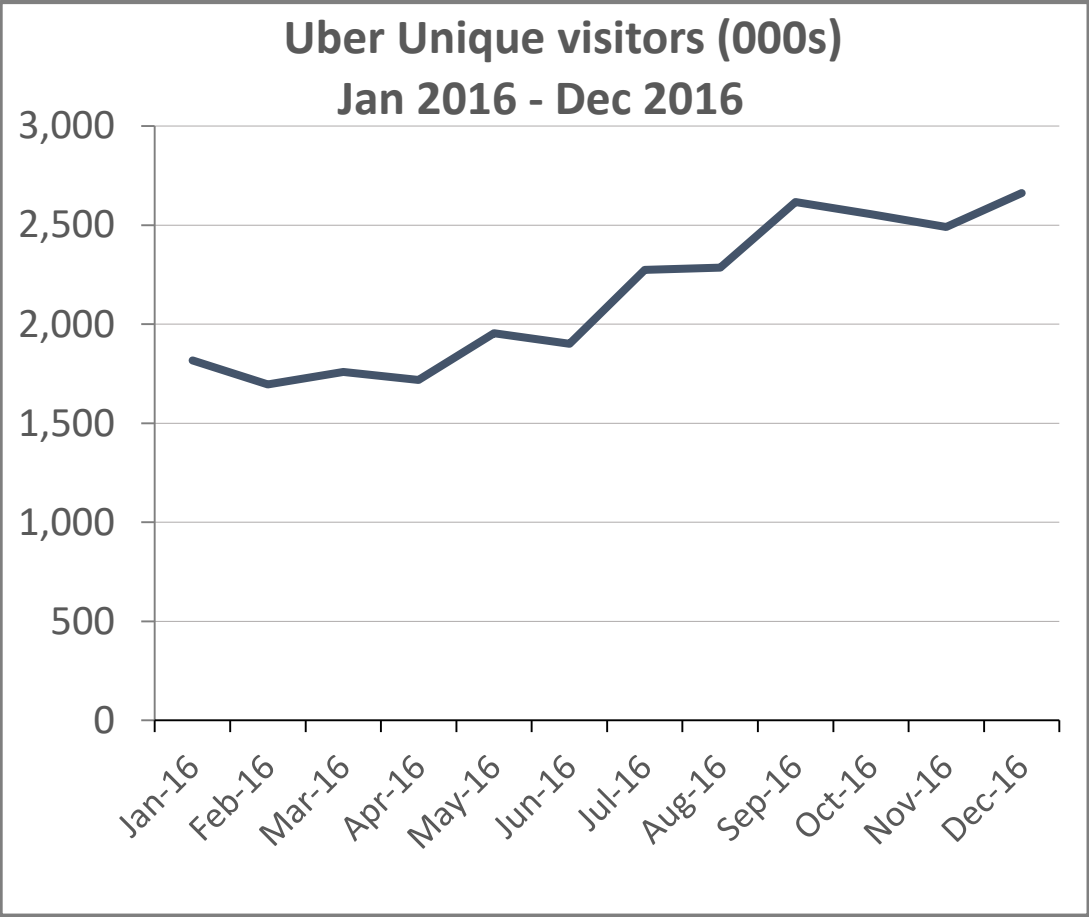
Source: comScore MMX Multi-Platform, Jan - Dec 2016, UK, Adults 18+

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.

Click here for original article: http://www.ukom.uk.net/uploads/files/UKOM_Insights_Uber_Pokemon.pdf

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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/

UKOM

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