

The UK Online Audience

Ian Dowds
IAB Research Breakfast
July 2019



Our industry drowns in acronyms & statistics

“There are three kinds of lie. Lies, damned lies and statistics.”

Attributed to Benjamin Disraeli by Mark Twain

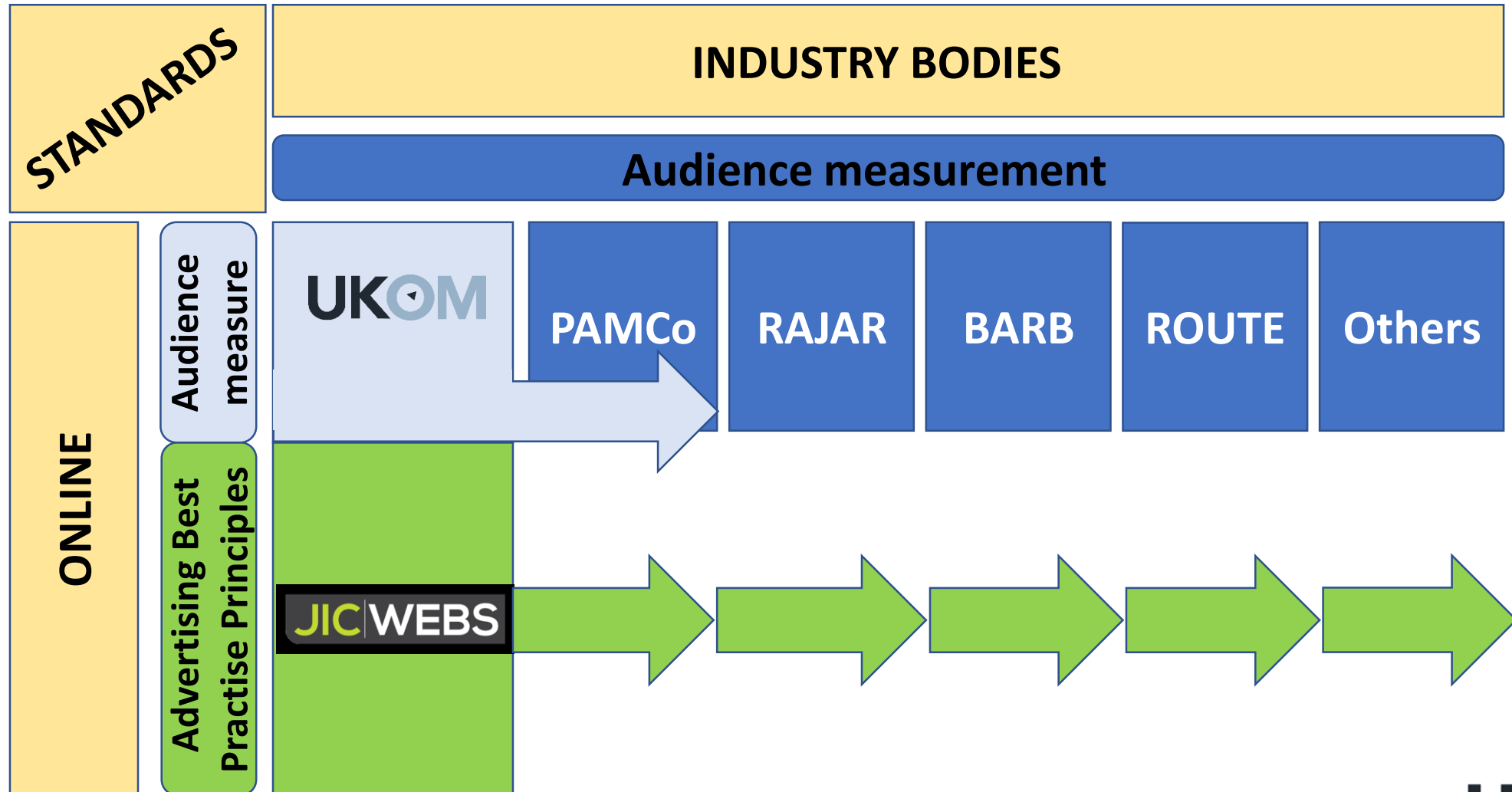
“There are two kinds of statistics. The ones you look up and the ones you make up.”

Rex Stout, American Author. 1886-1975

“58.7% of statistics are made up on the spot.”

Bloke down the pub.

UKOM 'market' position

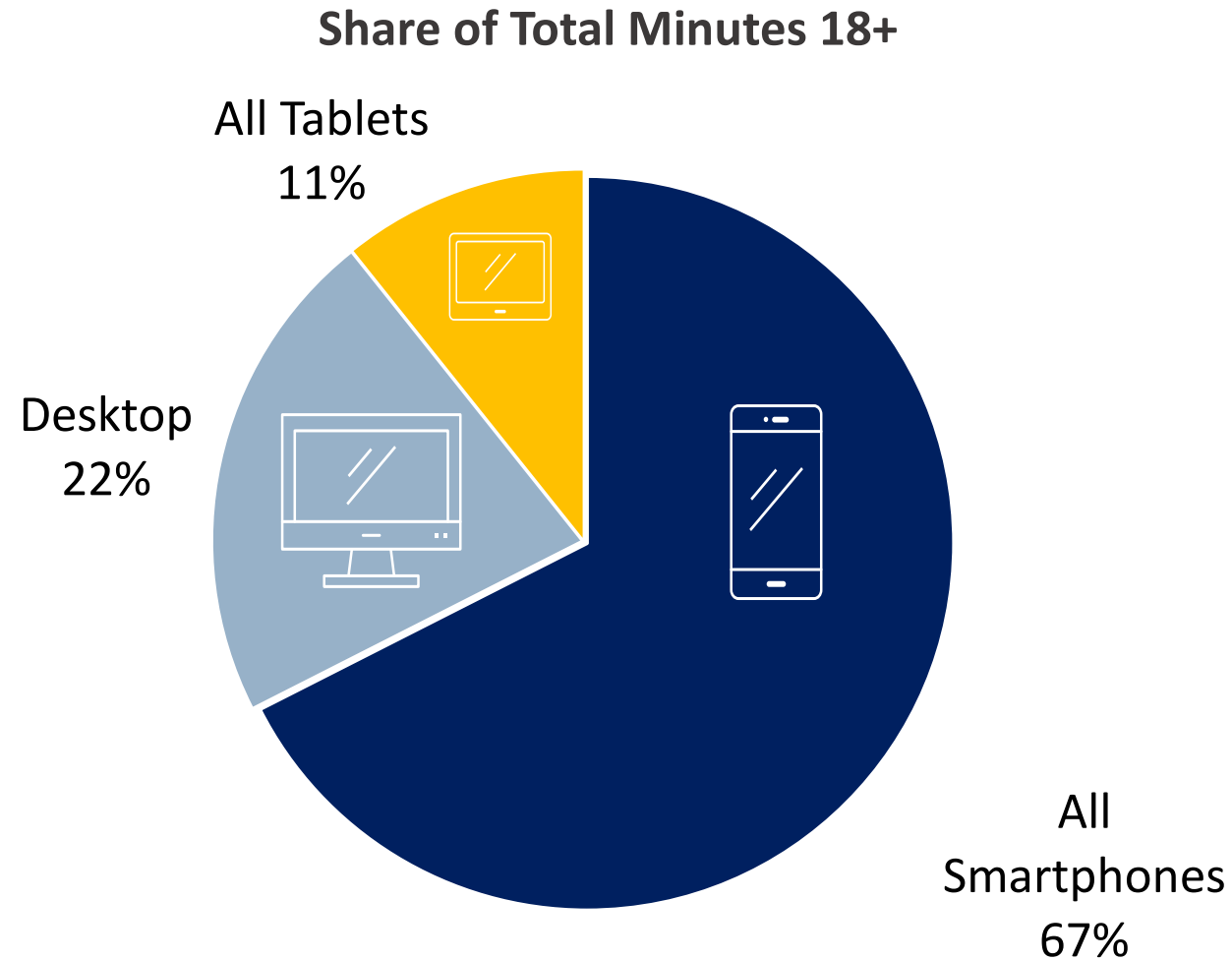


UKOM RFP 2021 onwards

- Evolution to include development of capability for
 - Audio
 - Content downloaded and consumed offline
 - Smart TVs
 - Voice activated devices
 - Non demographic audiences
 - Ad campaign audience verification (excl. viewability & brand safety)
 - Reach & frequency
- In the final stages of a decision
- Incumbent Comscore and new applicant IPSOS

Share of Minutes by Platform

Mobile Devices now account for **78%** of all adult online minutes

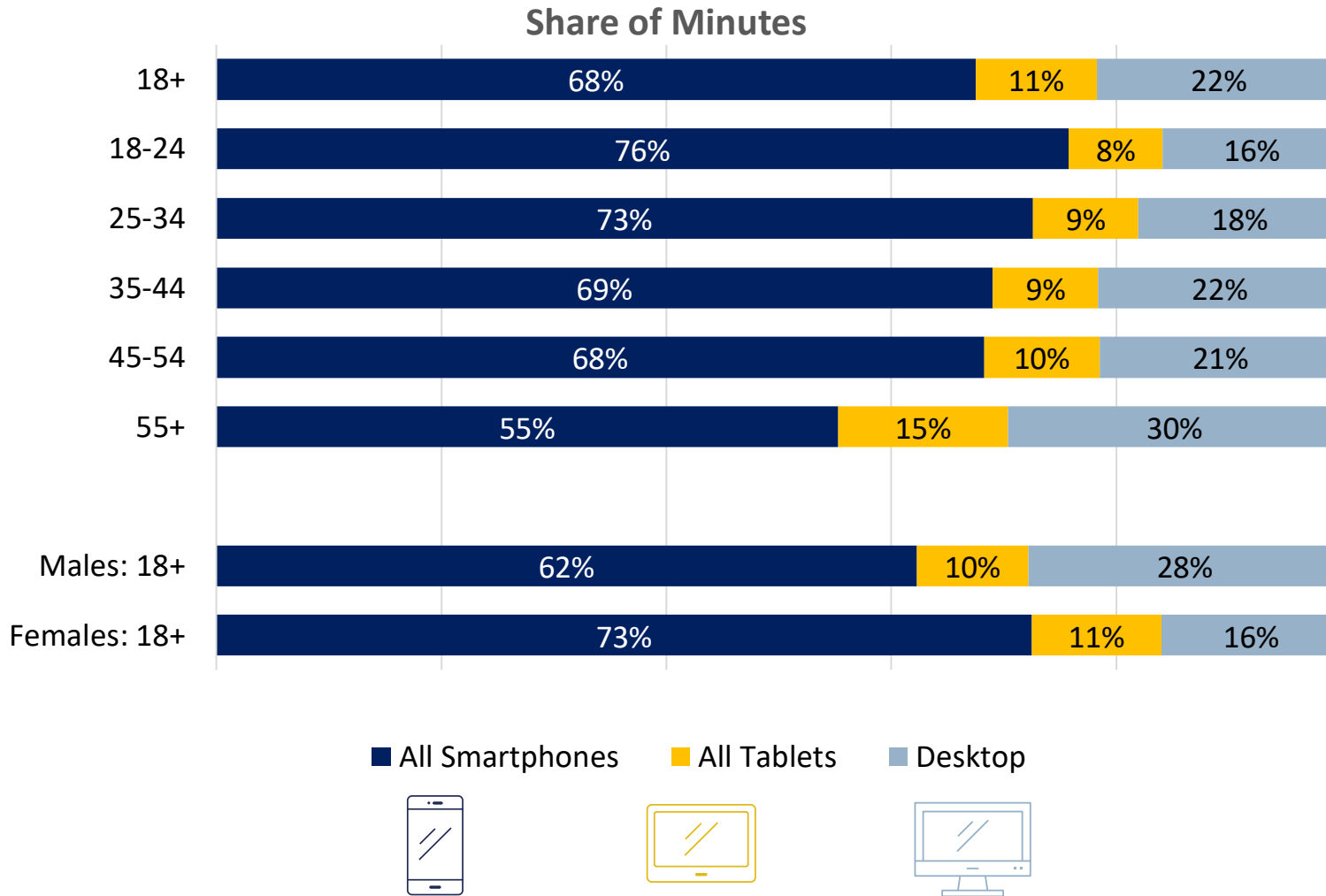


Source: Comscore MMX Multi-Platform, Jun 2019, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Platform Share of Minutes by Age & Gender

Millennials & females spend greatest share of time on mobile devices

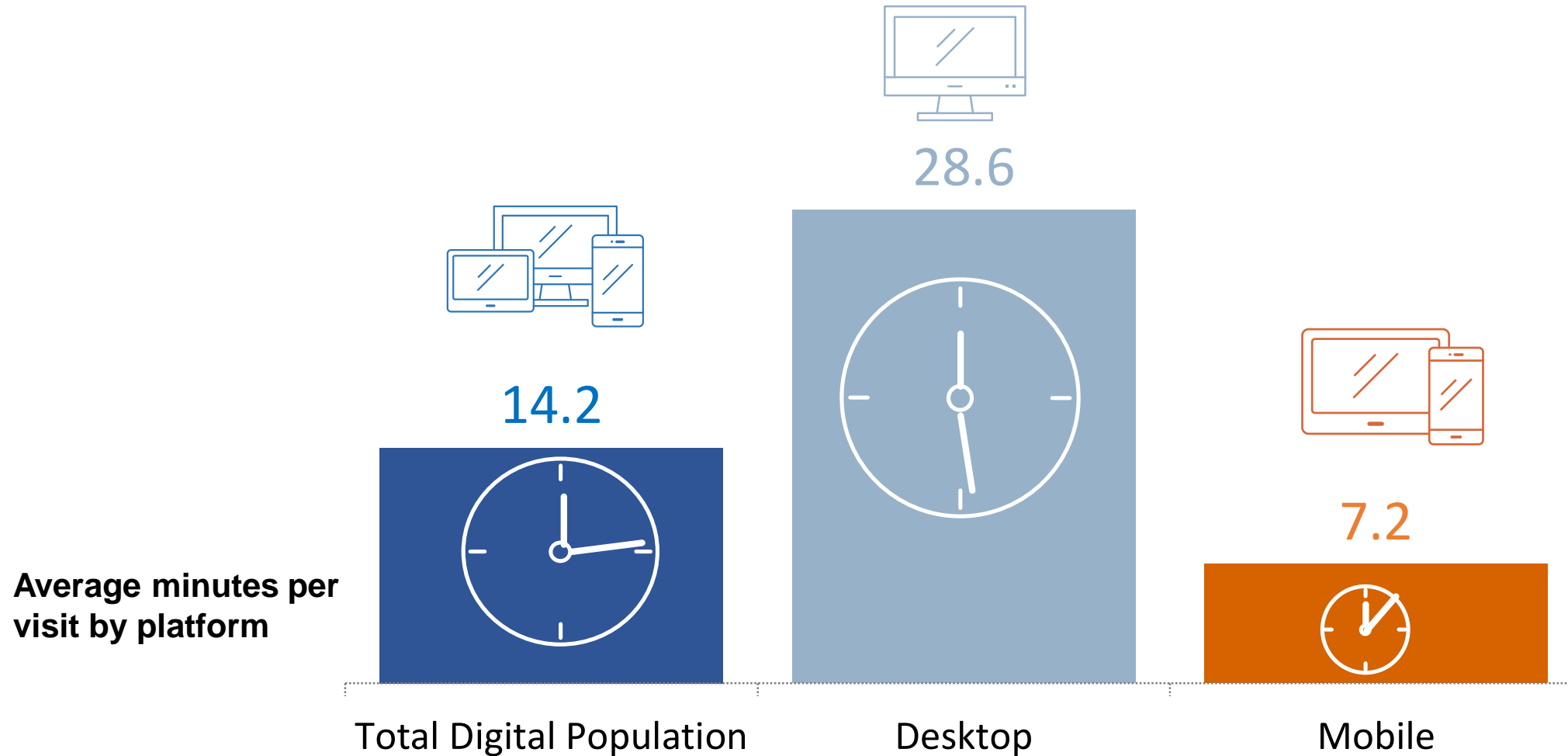


Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 84% of their time online on mobile devices compared to only 72% for males.

Average Minutes per Visit by Platform

Mobile visits are **shorter**



Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

21%

Computer Software	79%
Fragrances/Cosmetics	76%
Education	70%
Entertainment – Movies	65%
Insurance	62%
Business to Business	62%
Investments	58%
Taxes	57%
Media	56%
Government	56%
Computer Hardware	51%
Politics	49%
Humor	48%
Kids	48%
e-mail	47%



Smartphone total

67%

• Instant Messenger	99%
• Job Search	96%
• Consumer Electronics	95%
• Car Transportation	94%
• Diet & Exercise/Fitness Tracker	94%
• Gay/Lesbian	93%
• Coupons/Incentives	92%
• Payments	91%
• Maps/GPS/Traffic	90%
• Retail - Music	89%
• Entertainment - Music	88%
• Social Media	87%
• Health	87%
• Dating	86%
• Religion/Spirituality	84%



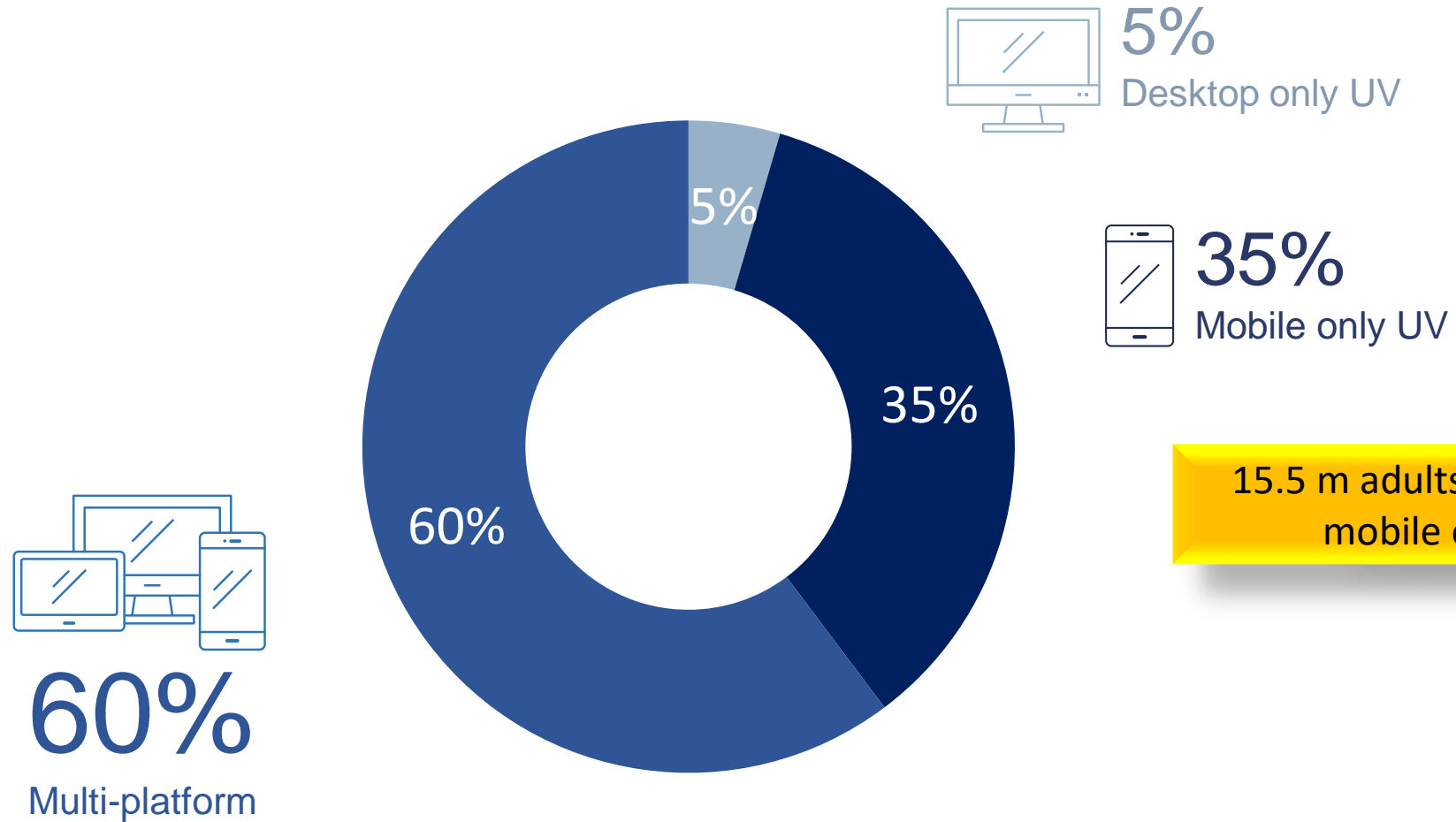
Tablet total

11%

Kids	30%
Family & Youth	25%
Books	23%
General News	20%
Entertainment	19%
Forums/Message Boards	17%
Real Estate	15%
Search/Navigation	15%
Online Gaming	15%
Games	14%
Family & Youth Education	13%
Politics	13%
Entertainment - News	12%
Local News	12%
Travel Information	12%

Multi-Platform Usage

Over a third of UK Adults are now Mobile Only



Source: Comscore MMX Multi-Platform, Jun 2019, UK Adults 18+

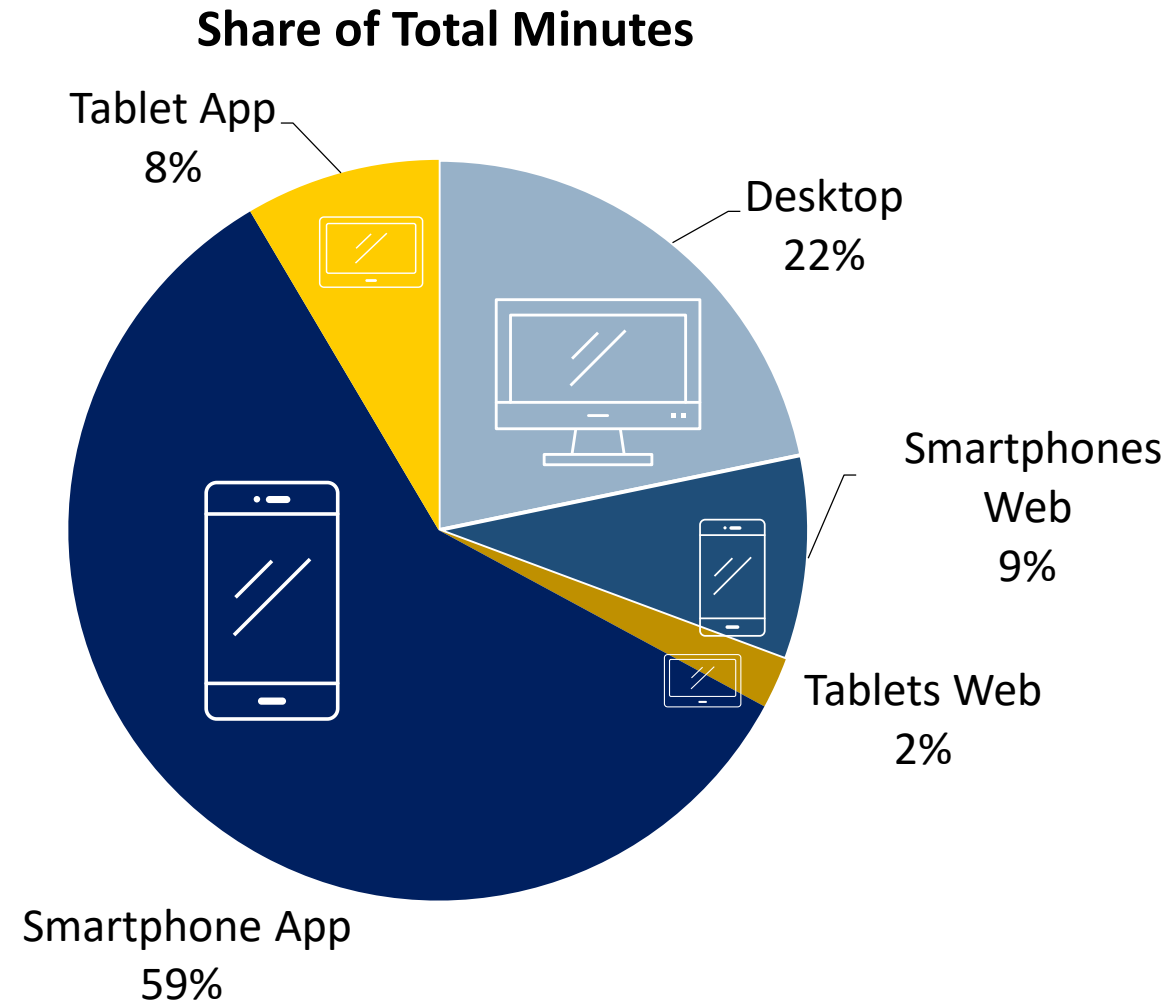
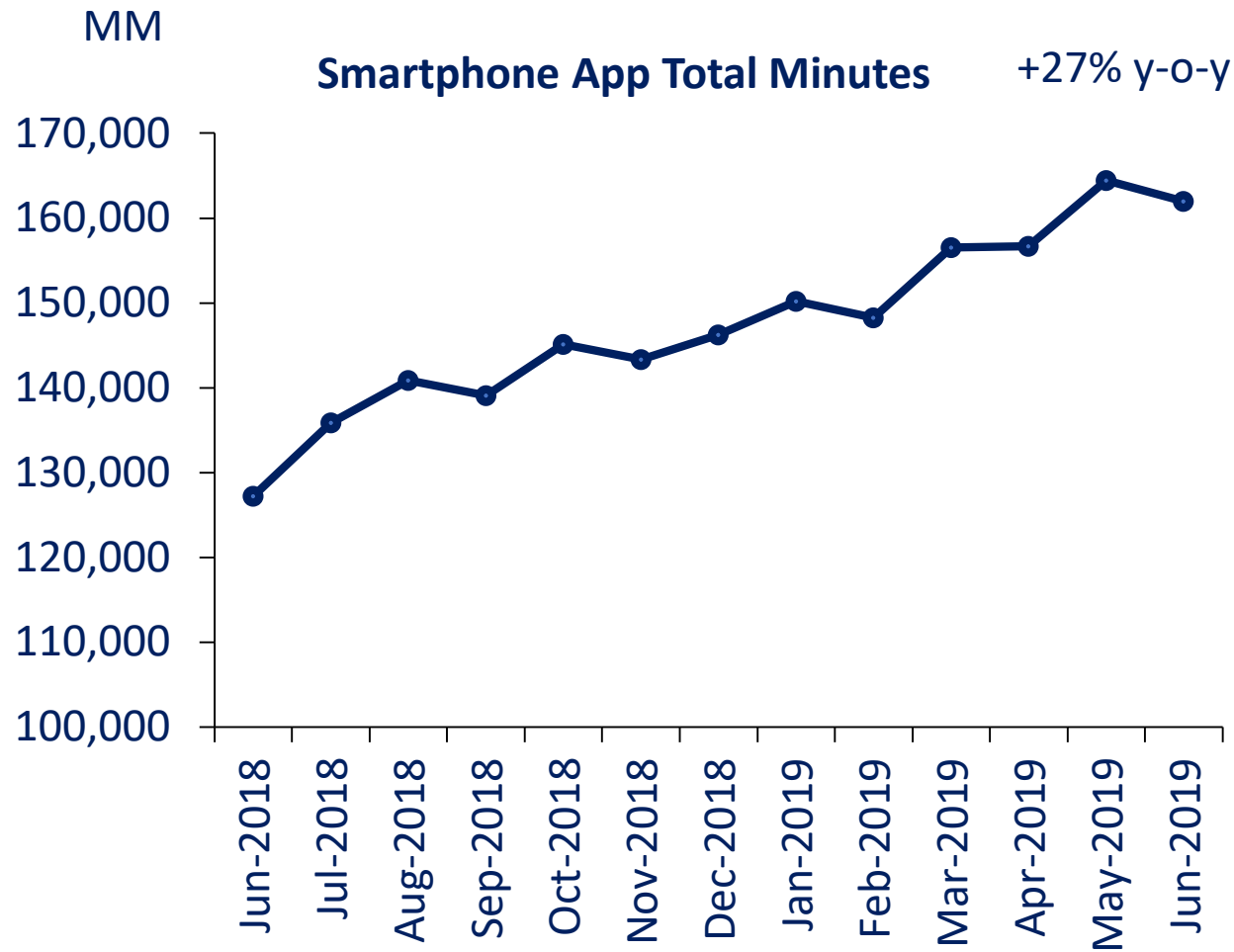


comscore

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. Total mobile refers to smartphone and tablet usage combined

Minutes by Platform & Mobile Access

Smartphone apps account for 59% of all Minutes



Source: Comscore MMX Multi-Platform, Jun 2019, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

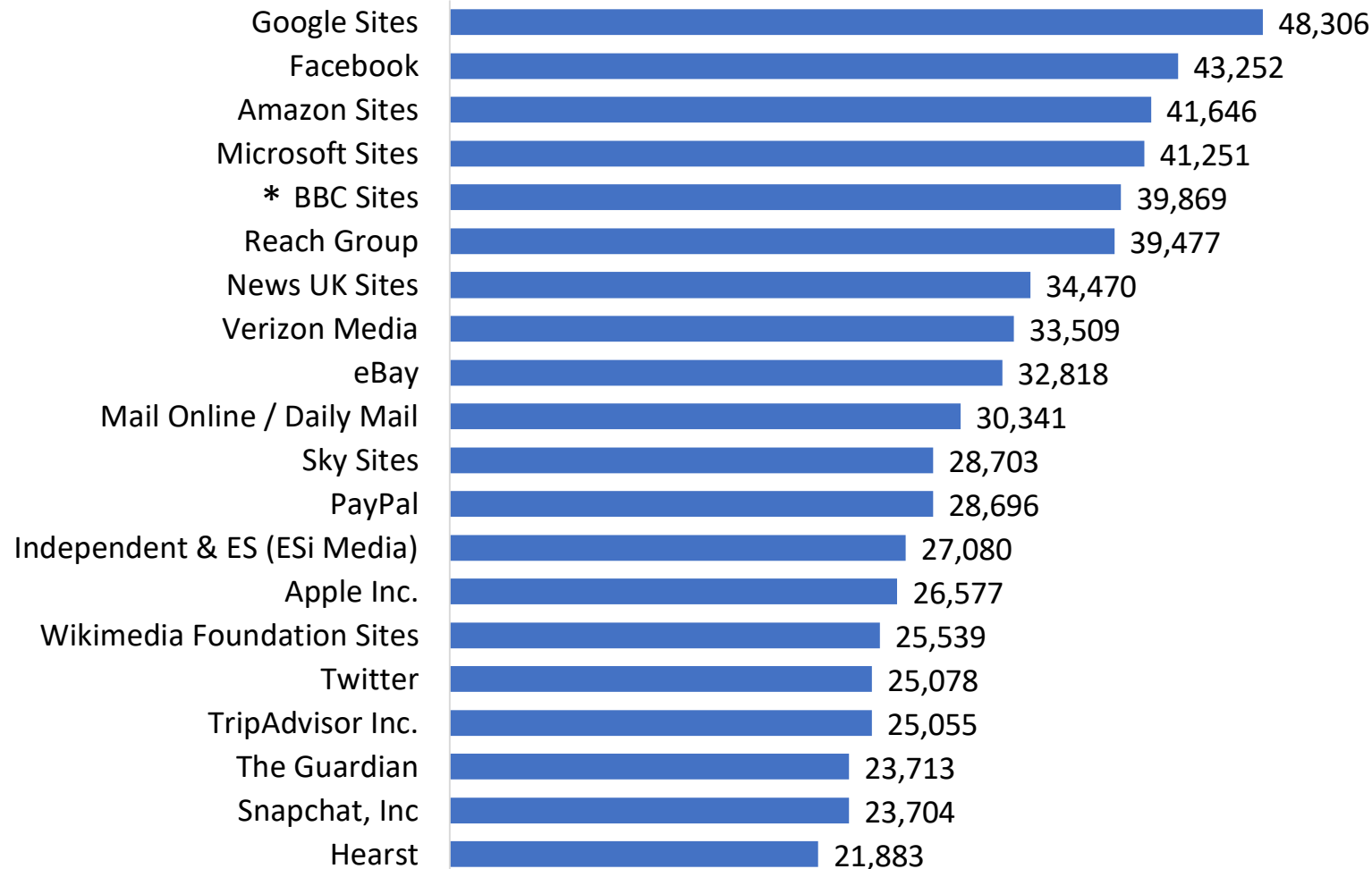
Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Top 20 Properties by 'Unique Visitors' - Total Digital Population

Google reaches 98% of the UK Online population



Total Unique Visitors/Viewers (000s) = 49,385



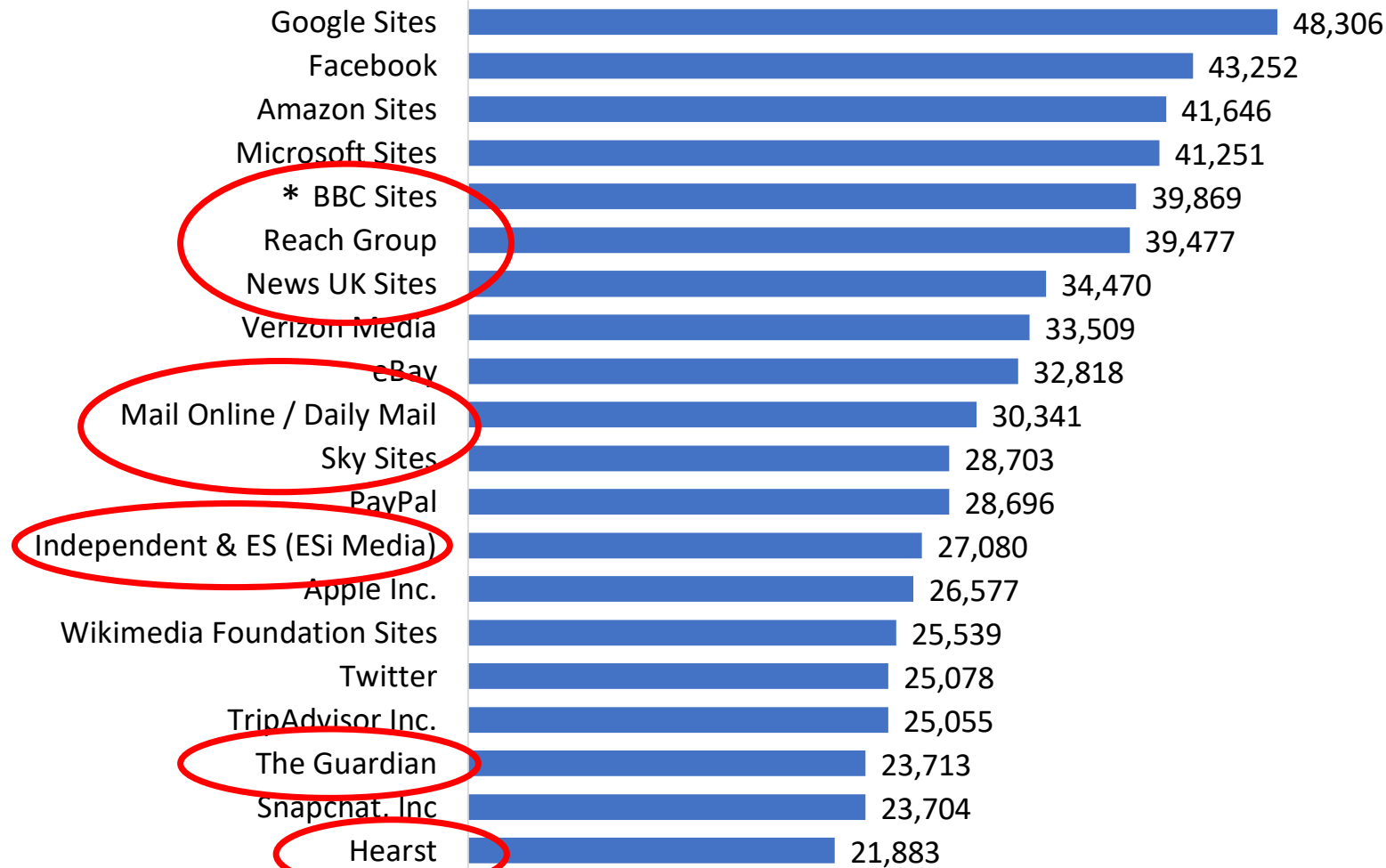
The top 5 properties
all have online reach
over 80%

Top 20 Properties by 'Unique Visitors' - Total Digital Population

Google reaches 98% of the UK Online population



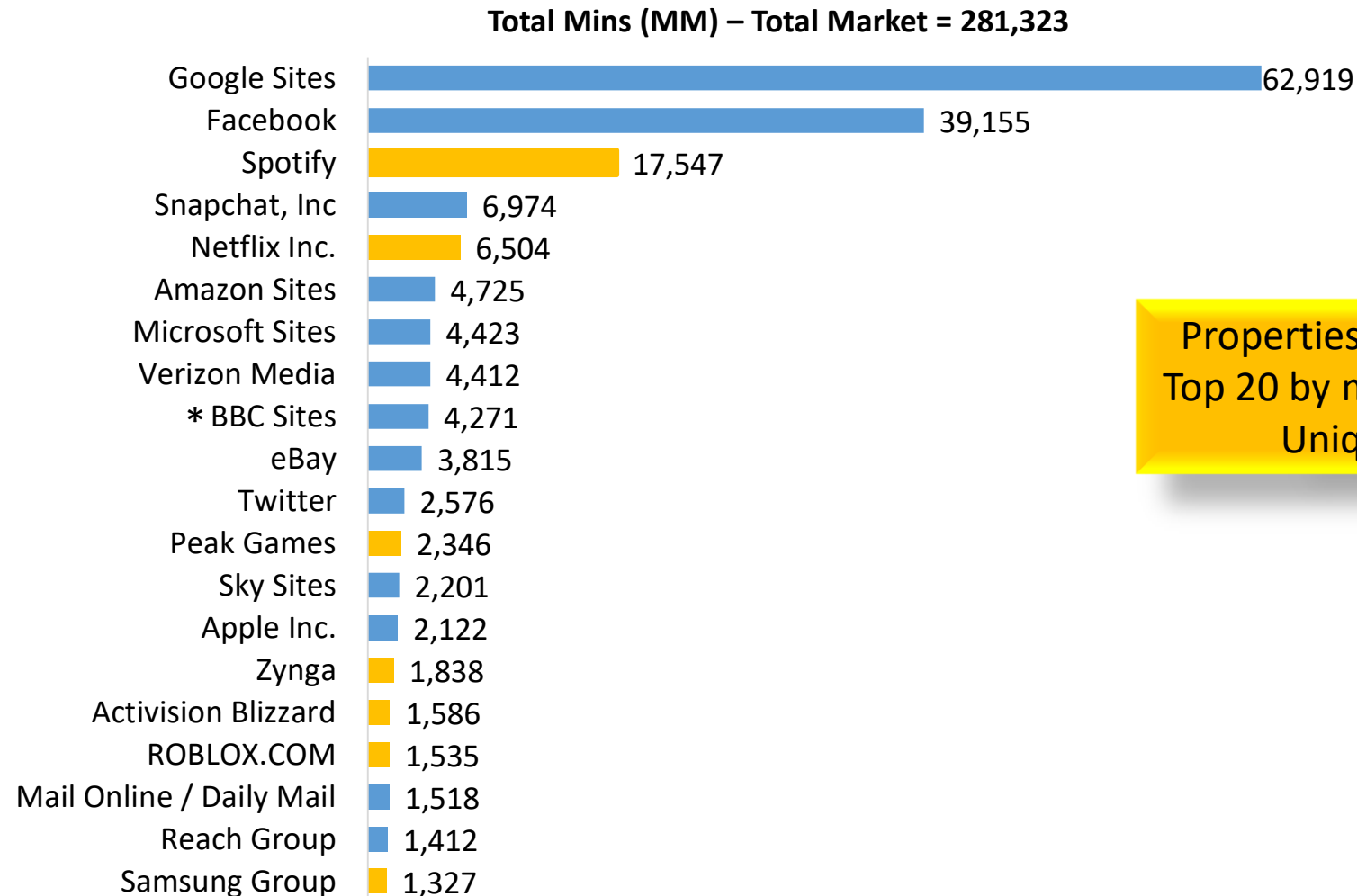
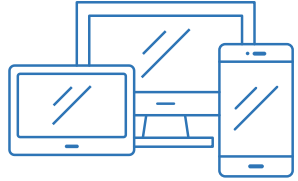
Total Unique Visitors/Viewers (000s) = 49,385



'Traditional' media still attracts significant monthly audience


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

Entertainment (games/music/TV) & social media sites drive minutes




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

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Digital Market Overview




Q1 2019 UK Digital Market Overview report

Insights include: Seasonal uplifts for Government, Automotive and Career categories with Paliament.uk, Indeed and Autotrader showing most growth compared to December 2018. Time spent on mobile




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,




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...

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Insights



New Mobile Finance Apps

Each month, UKOM's partner, Comscore, reports usage data for nearly 2800 mobile apps, over 50 of which are in the financial services category.


25.06.2019



Online Travel Agents

UKOM looks at online travel agents to explore if category visitors are down year-on-year and who are the biggest winners and losers.

12.06.2019




How do people really behave online?



13% don't use the Internet at all: major study from Ofcom reveals some surprising truths about online life in the UK

10.06.2019

UKOM Insights: Online Travel Agents: Jan 2019




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Fly from London Stansted	Fly from London Stansted	Fly from London Stansted
to Corfu	to Rhodes	to Crete
from £61	from £61	from £65
VIEW NOW	VIEW NOW	VIEW NOW
Fly from London Stansted	Fly from London Stansted	Fly from London Stansted
to Kos	to Paphos	to Majorca
from £63	from £68	from £35
VIEW NOW	VIEW NOW	VIEW NOW


LAST RESORT Thomas Cook and Tui are the worst package holiday providers while Jet2 is one of the best


Qin Xie
19 Jul 2019, 0:01 | Updated: 19 Jul 2019, 13:00

[Twitter](#) [Facebook](#) [4 COMMENTS](#)

THOMAS Cook has been named the worst package holiday provider by Which? Travel, followed close behind by Tui.

And on the opposite end of the scale, Trailfinders have been named the best.





Creta Maris Beach Resort	£650 pp
Amphora Club Hotel & Village ...	£444 pp
Orion Beach Resort	£680 pp
Neptune Hotels Resort and Spa	£531 pp
Astir Beach Hotel	£349 pp
Radisson Blu Beach Resort Cr...	£574 pp



Online Travel Agents

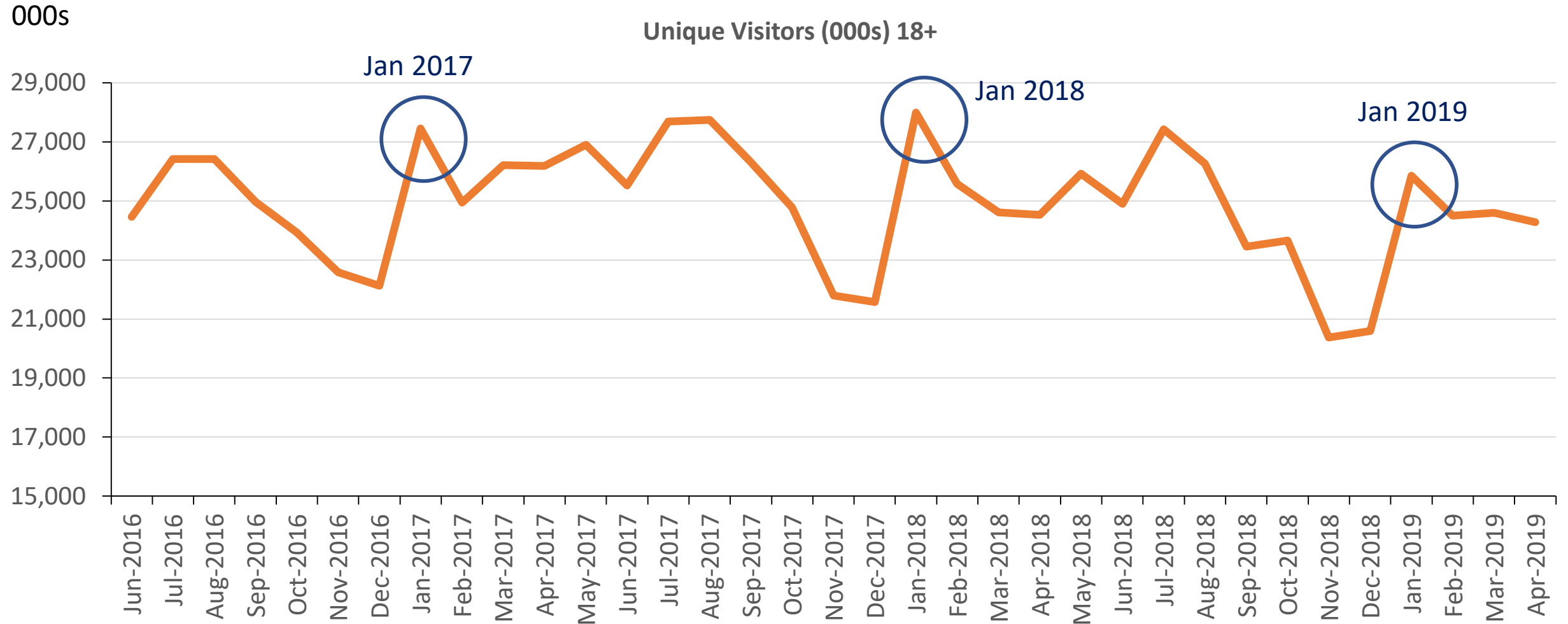
UKOM looks at online travel agents to explore if category visitors are down year-on-year and who are the biggest winners and losers.

12.06.2019

MORE +

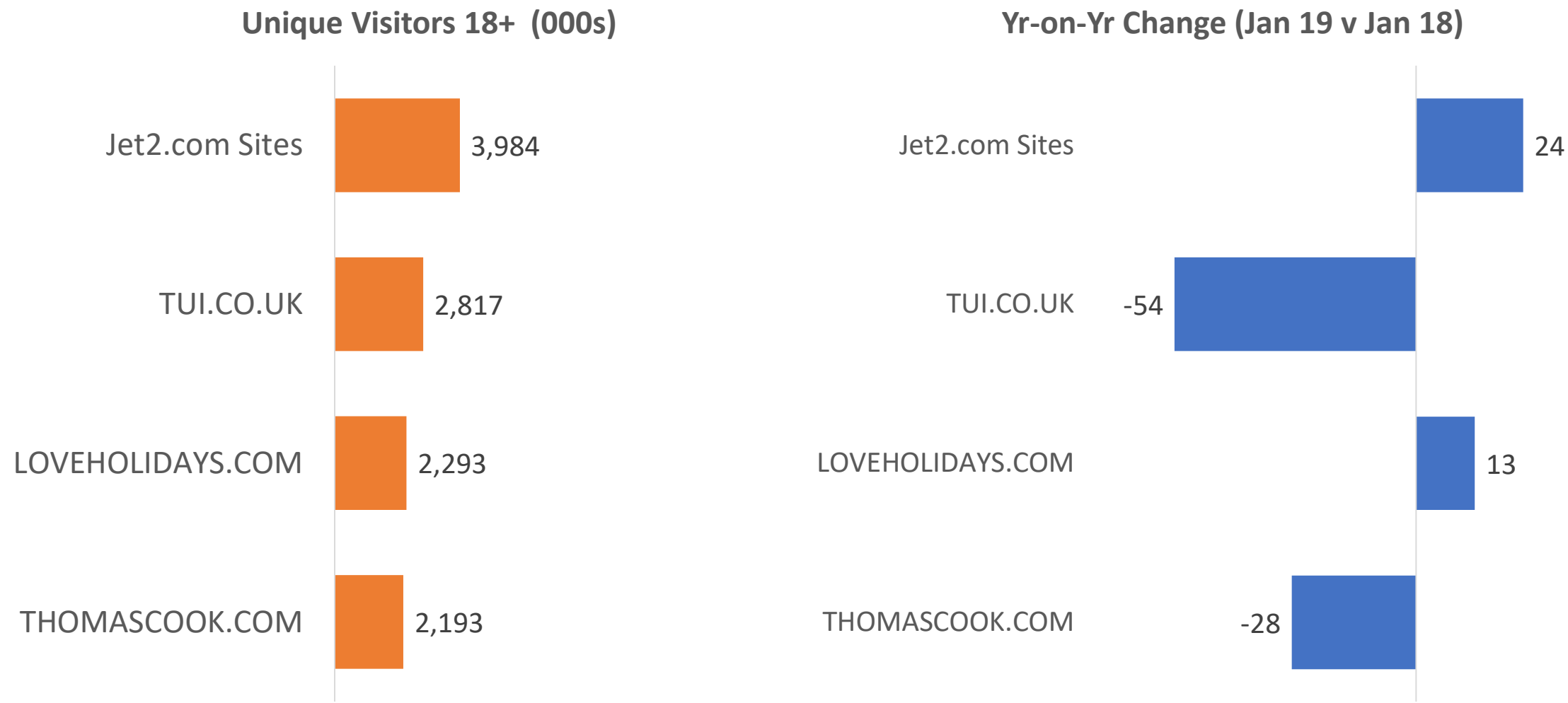
Visitors to Online Travel Agents by Month since Brexit Vote

January 2019 visitors were down by 8% yr-on-yr



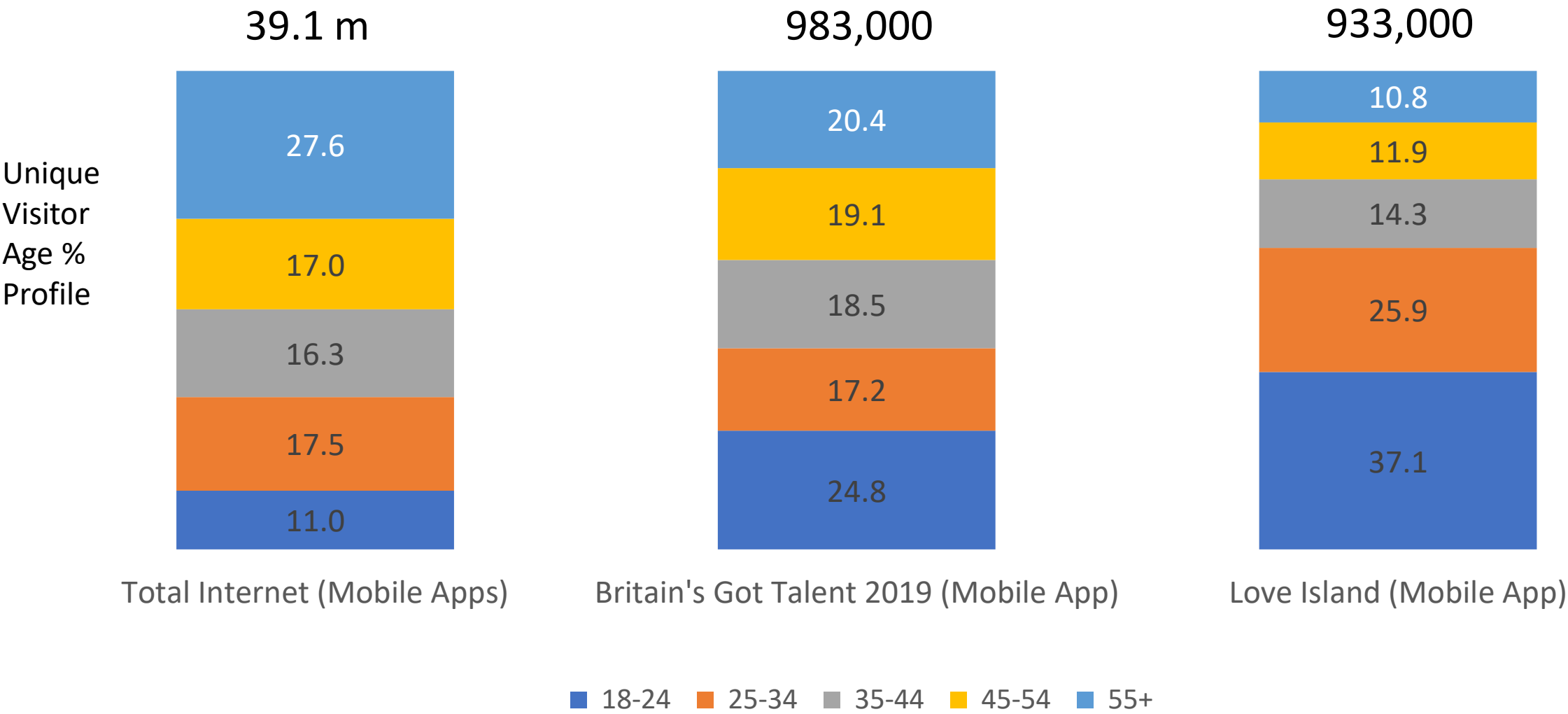
Visitors to Online Travel Agents Category in January 2019

TUI and Thomas Cook experienced biggest y-o-y decreases



ITV BGT and Love Island Mobile App Audience Profile: June 2019

Same Channel, Same Platform, Same Size but Different Age Profile



Top Online Gaming Mobile Apps

Gaming Apps have low reach but high engagement

	Gaming Apps	Total Unique Visitors (000s)	Ave Mins /Visitor	UV Rank Top 200 Apps	Ave Mins Rank Top 200 Apps
1	Coin Master	3,609	347.5	43	16
2	Lucky Day	2,170	165.0	87	39
3	Candy Crush Saga	1,988	297.5	96	22
4	Pokémon GO	1,589	566.2	116	7
5	8 Ball Pool	1,519	264.5	123	25
6	Wordscapes	1,458	304.5	127	18
7	Harry Potter: Wizards Unite	1,380	96.7	134	61
8	Homescapes	1,137	519.3	161	9
9	Candy Crush Soda Saga	1,078	346.7	168	17
10	Words with Friends 2 - Word Game	986	549.2	178	8

Setting the industry standard for online audience measurement

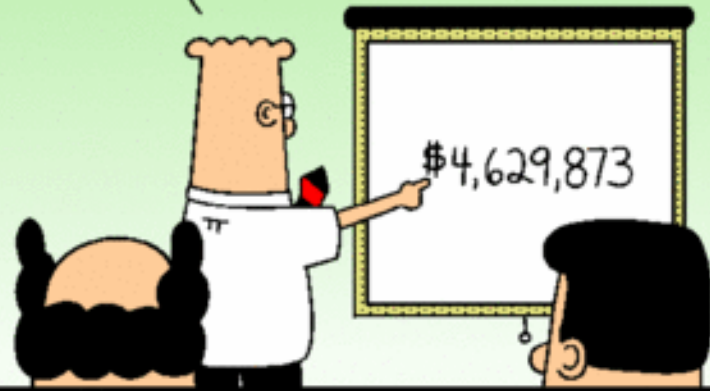
UKOM is where industry stakeholders come together to define and govern a UK standard for audience measurement across PC, tablet and smartphone.

We quantify audiences in terms of people, not browsers or machines – because demography still lies at the heart of what advertisers want to achieve.



The perils of life without UKOM?

I DIDN'T HAVE ANY
ACCURATE NUMBERS
SO I JUST MADE UP
THIS ONE.



scottadams@aol.com

www.dilbert.com

STUDIES HAVE SHOWN
THAT ACCURATE
NUMBERS AREN'T ANY
MORE USEFUL THAN THE
ONES YOU MAKE UP.



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HOW
MANY
STUDIES
SHOWED
THAT?

EIGHTY-
SEVEN.



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