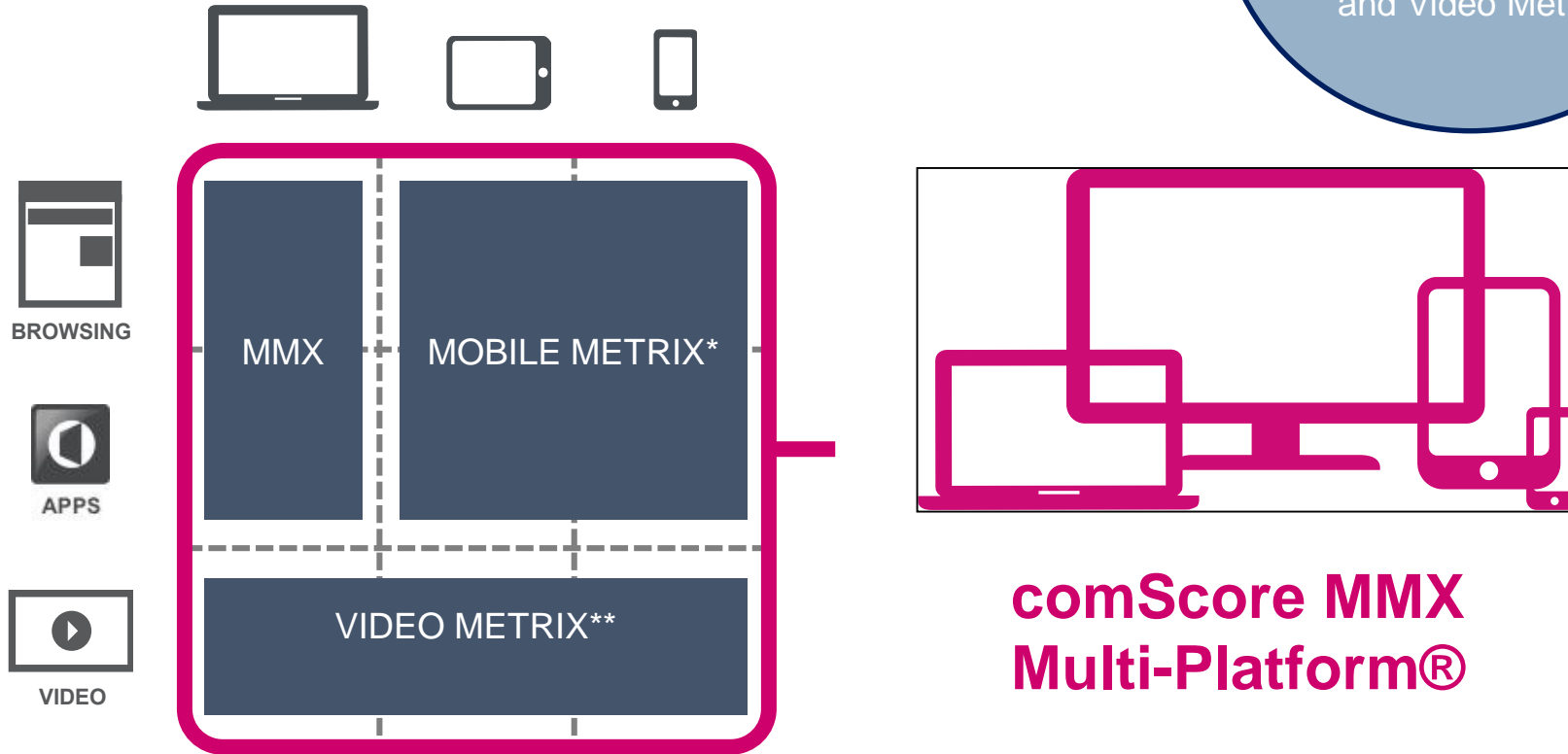# UK Digital Market Overview – March 2017

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

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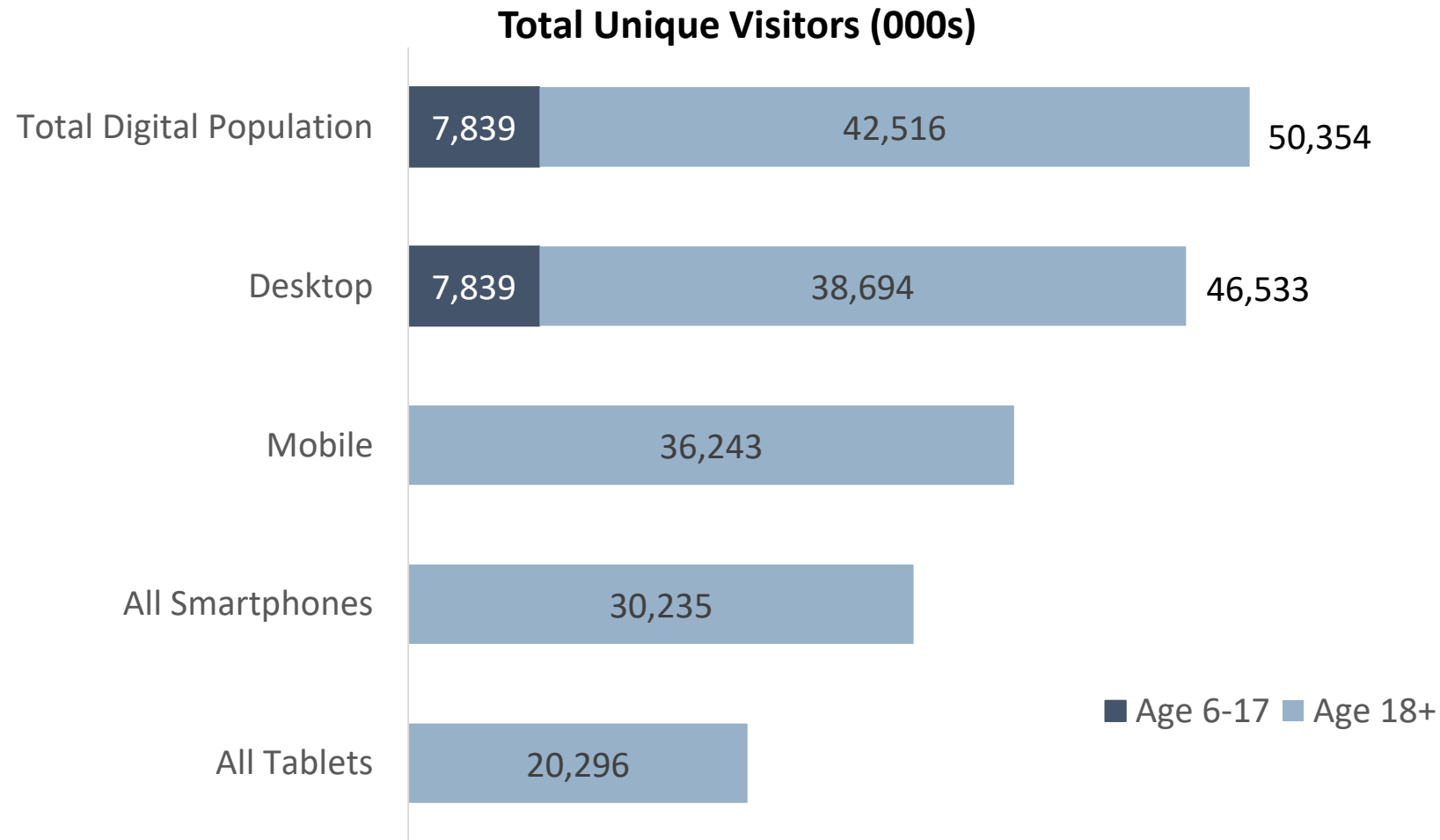
Total Digital Population = Unduplicated audience across MMX, Mobile Metrix and Video Metrix

BROWSING

APPS

VIDEO

MMX

MOBILE METRIX*

VIDEO METRIX**

comScore MMX Multi-Platform®

*Please note that we use the term mobile to refer to smartphone and tablet usage combined

**Video not yet included for mobile and tablet

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Multi-Platform Usage

Breakdown of Digital – Unique Visitors by Platform
Total Digital Population across desktop & mobile devices was 50.4m in March 2017

Total Unique Visitors (000s)

Platform	Age 6-17	Age 18+	Total
Total Digital Population	7,839	42,516	50,354
Desktop	7,839	38,694	46,533
Mobile		36,243	
All Smartphones		30,235	
All Tablets		20,296	

■ Age 6-17 ■ Age 18+

The desktop*still has the biggest audience despite mobile growth

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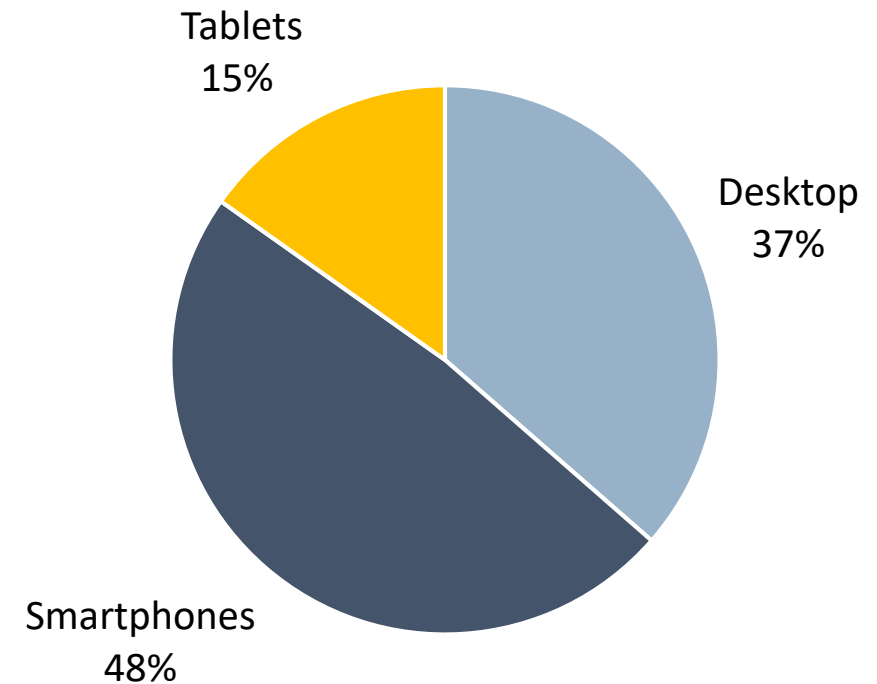## Although more adults use a PC, they spend more time on smartphones

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

March 2017

Bar chart:
- Desktop: 38,694 — 91%
- All Smartphones: 30,235 — 71%
- All Tablets: 20,296 — 48%

Pie chart:
- Desktop 37%
- Smartphones 48%
- Tablets 15%

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UKOM
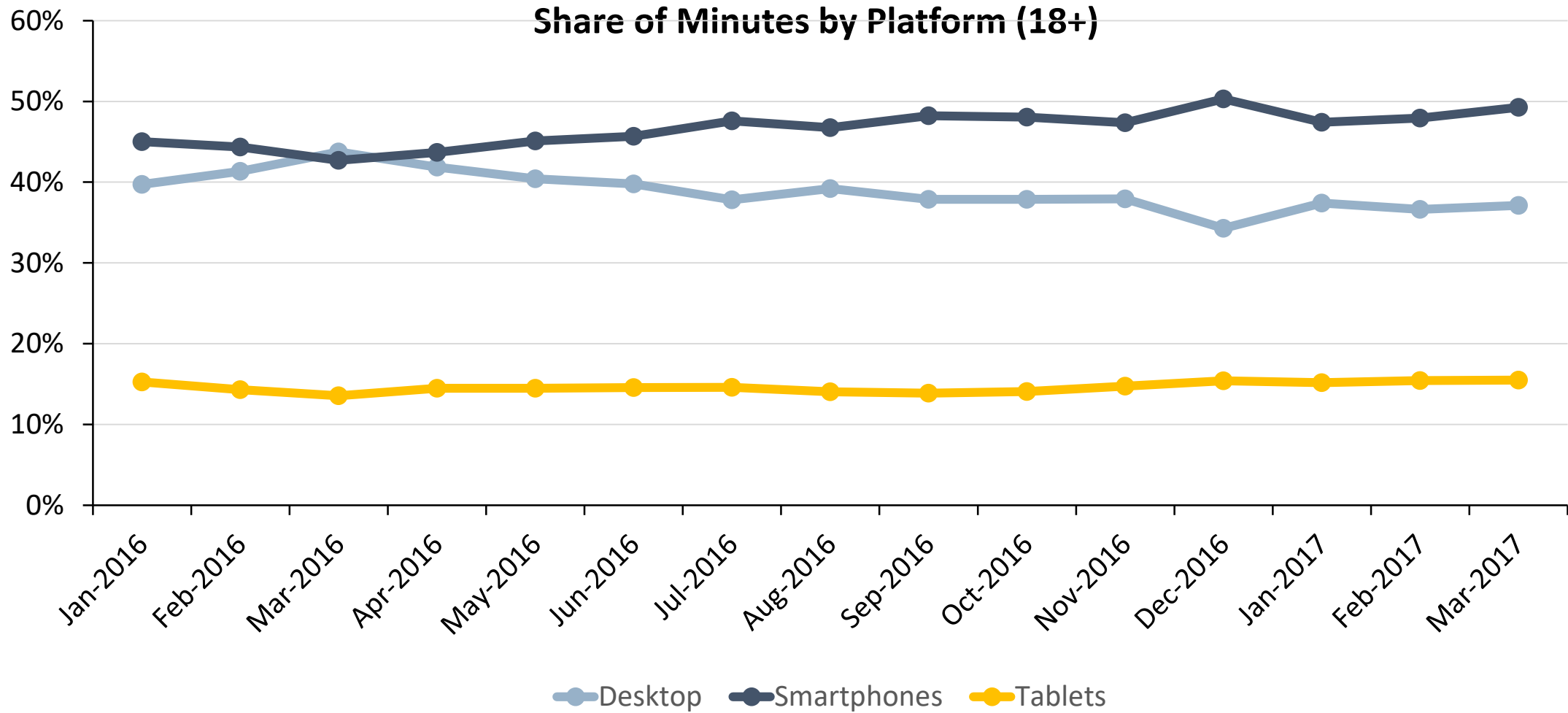Setting the industry standard for online audience measurement
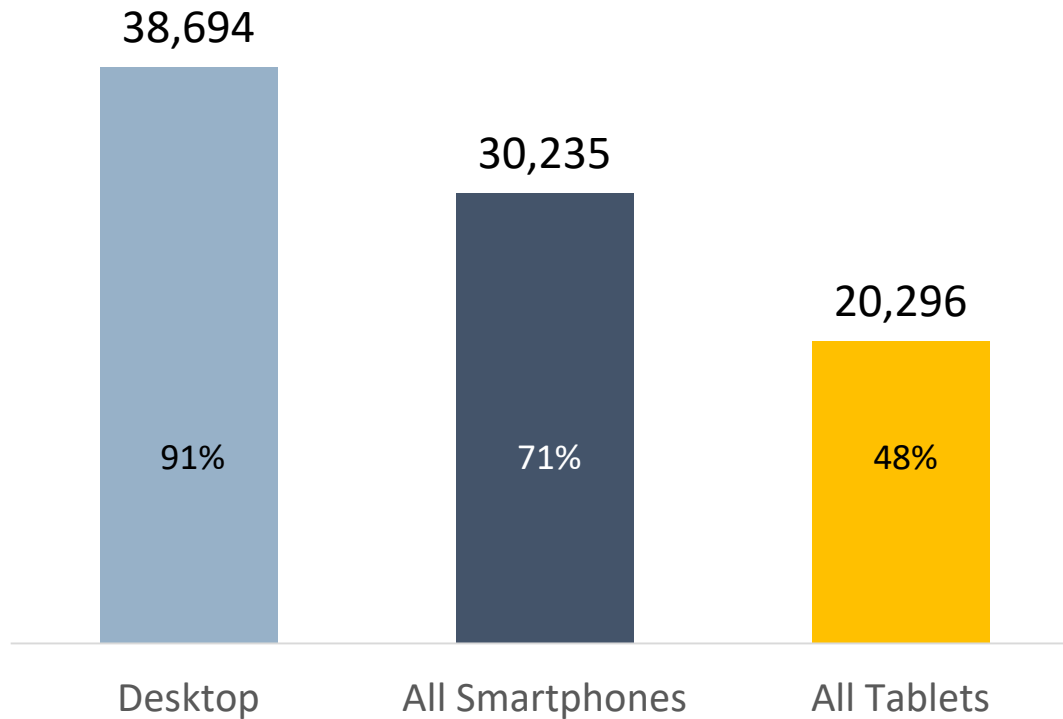
Change in Share of Minutes by Platform Jan 2016 to Mar 2017
Mobile's SOM continues to rise steadily in 2017, after peaking in December

Share of Minutes by Platform (18+)

Legend: Desktop — Smartphones — Tablets

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

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

Additional Mobile Minutes

Desktop ■ Mobile

Source: comScore MMX Multi-Platform, 2016 & 2017, 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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Platform Unique Visitors by Age
The desktop still has the biggest audience across all age groups

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

	Desktop	All Smartphones	All Tablets
18-24	5,386	5,166	2,433
25-34	8,070	7,621	4,221
35-44	7,375	6,367	3,877
45-54	7,570	5,921	3,965
55+	10,292	5,160	5,799

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

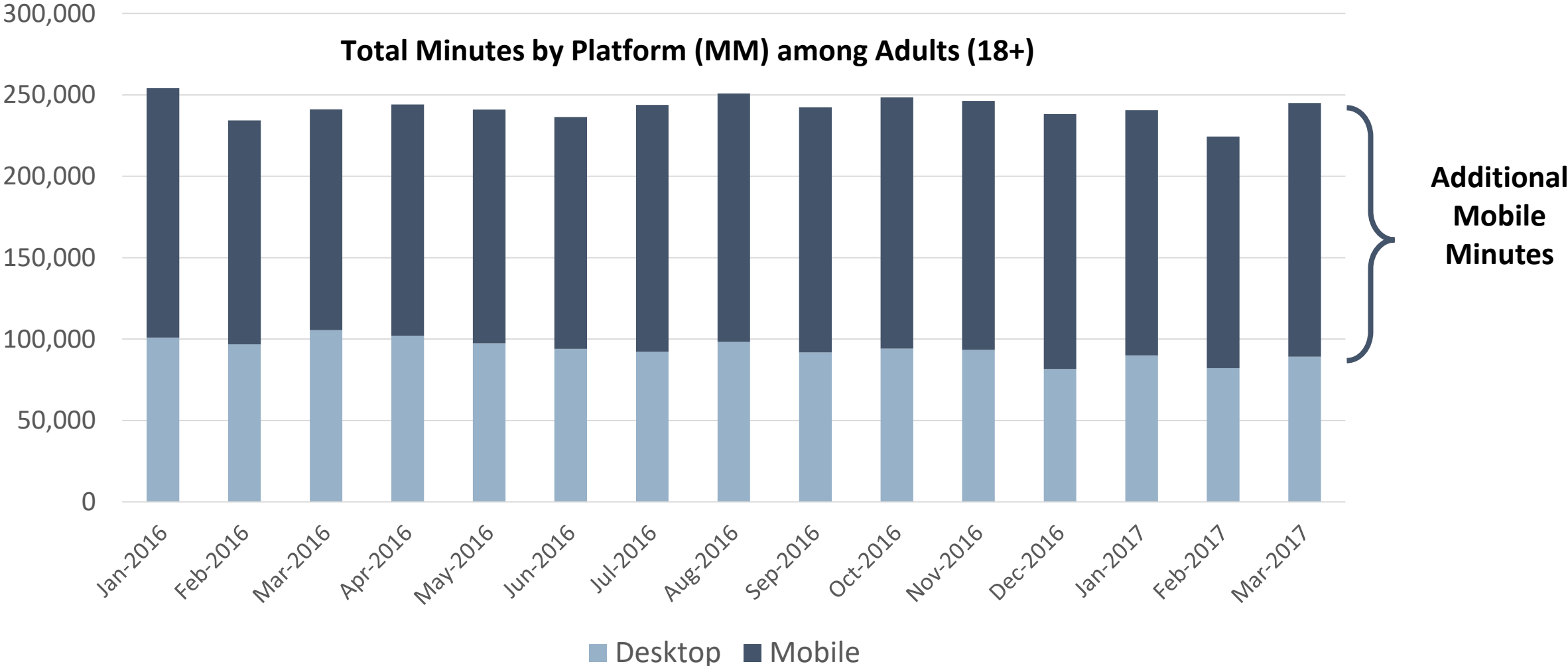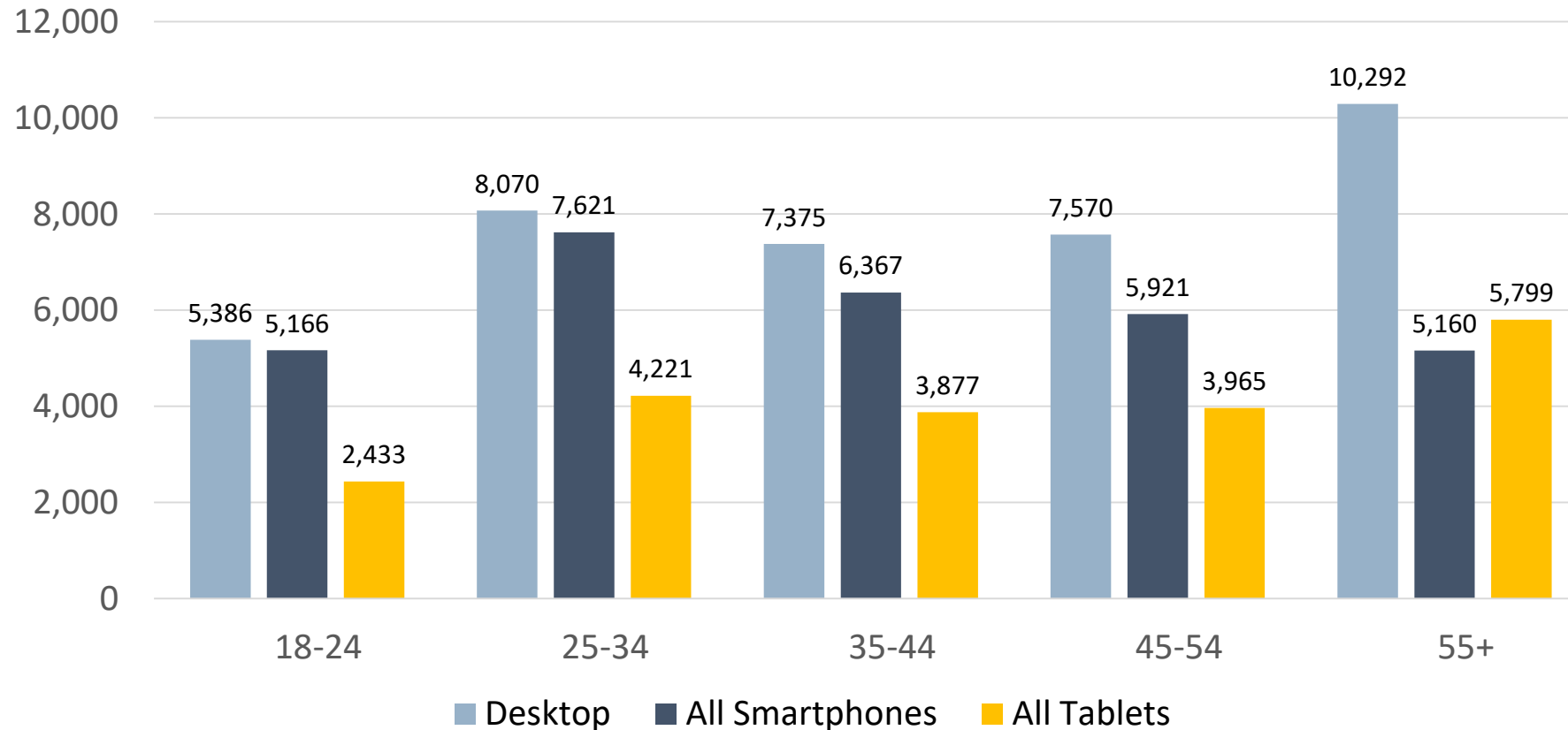Source: comScore MMX Multi-Platform, March 2017, UK

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 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 UV
18-24	11%	13%	76%
25-34	11%	12%	78%
35-44	11%	8%	80%
45-54	13%	10%	78%
55+	24%	5%	71%
Males: 18+	15%	8%	77%
Females: 18+	14%	10%	76%

■ Desktop-Only UV (000)   ■ Mobile-Only UV (000)   ■ Multi-Platform UV (000)

13% of 18-24s do not use a desktop PC to access the internet

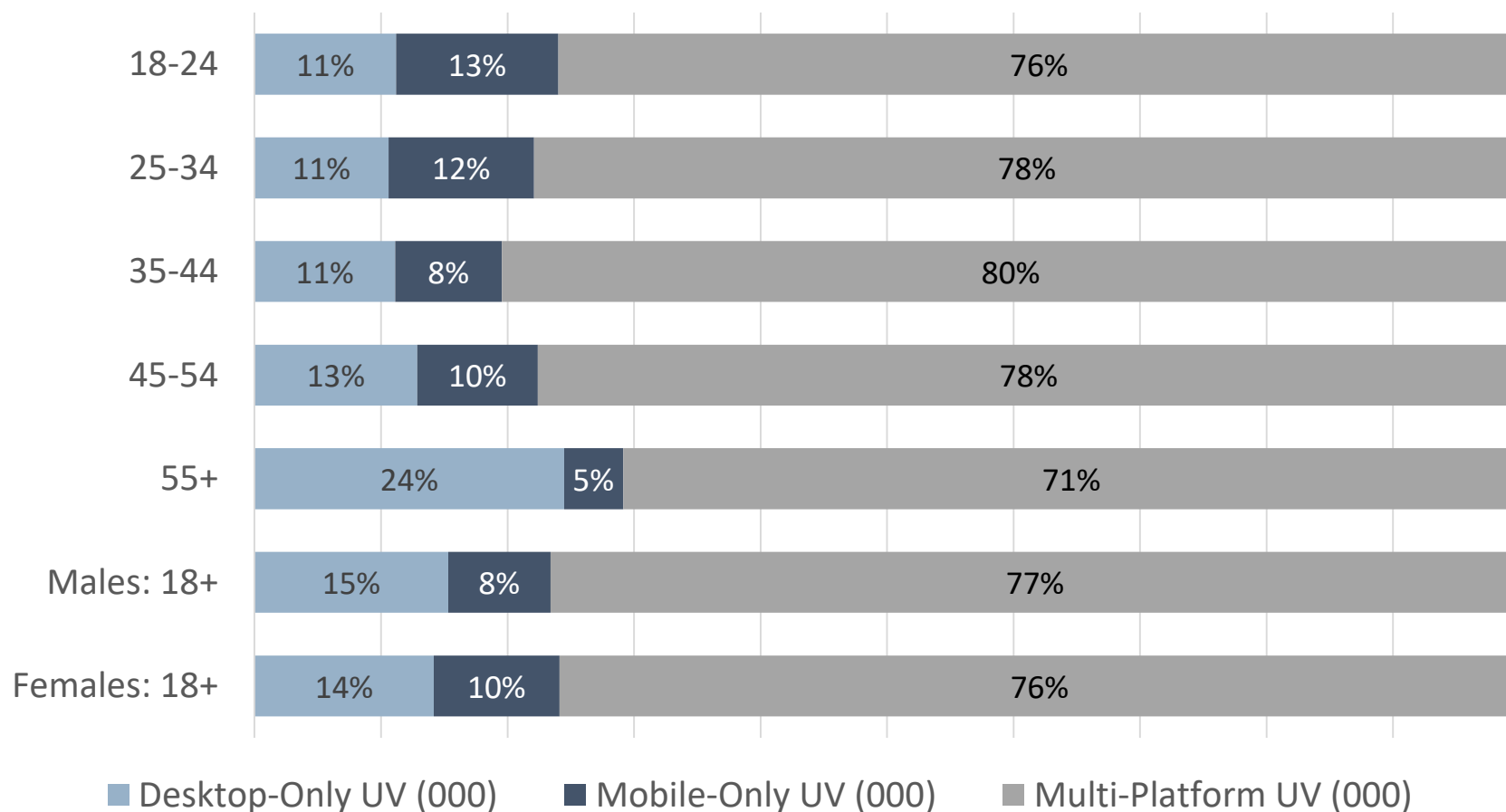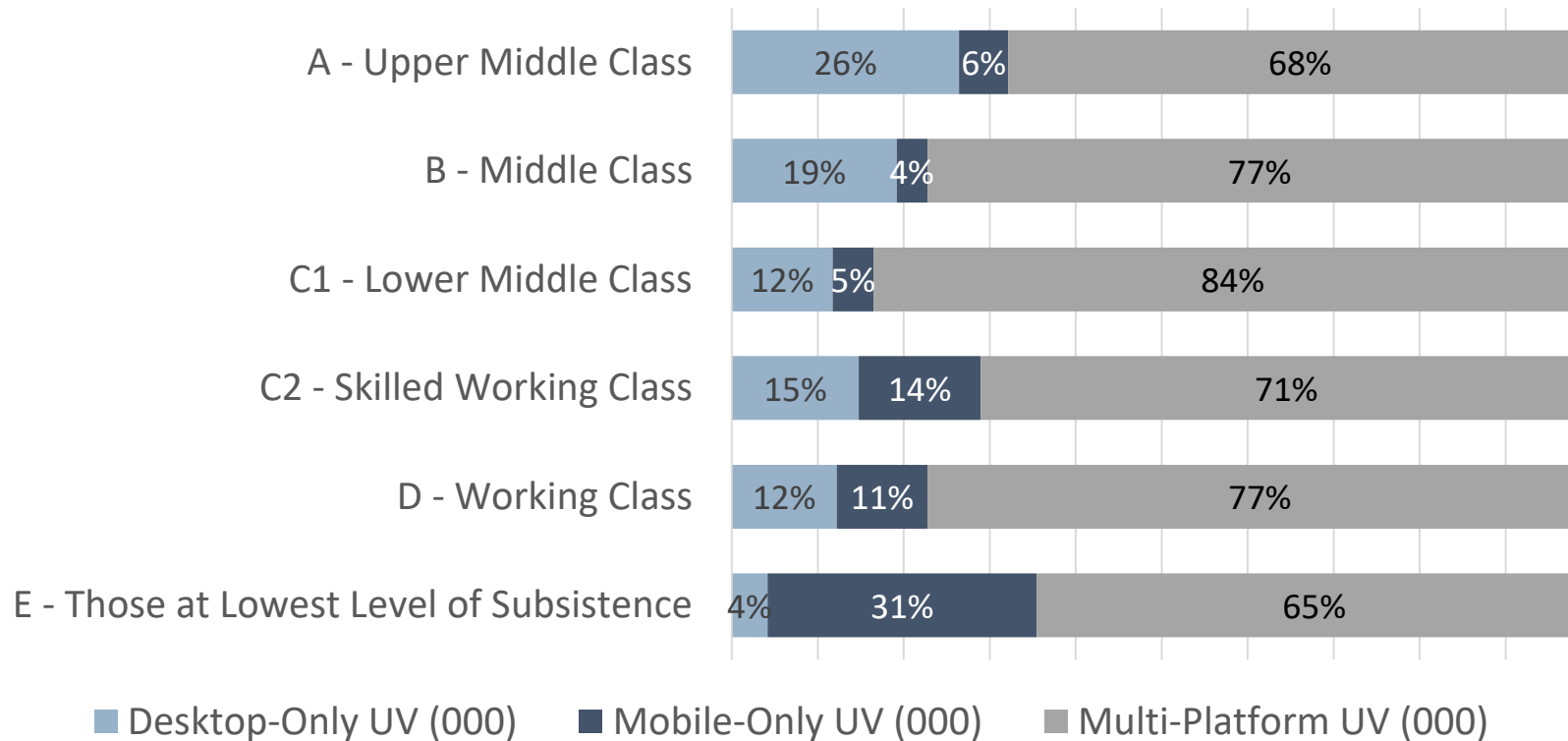A quarter (24%) of over 55s **ONLY** use the desktop/laptop

Source: comScore MMX Multi-Platform, March 2017, 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 Grade

Social Class	Desktop-Only	Mobile-Only	Multi-Platform
A - Upper Middle Class	26%	6%	68%
B - Middle Class	19%	4%	77%
C1 - Lower Middle Class	12%	5%	84%
C2 - Skilled Working Class	15%	14%	71%
D - Working Class	12%	11%	77%
E - Those at Lowest Level of Subsistence	4%	31%	65%

■ Desktop-Only UV (000) ■ Mobile-Only UV (000) ■ Multi-Platform UV (000)

26% of social class A only use a desktop PC to access the internet, down from 34% in December 2016

Lower social classes are more likely to ONLY use a mobile to access the internet

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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
18+	48%	15%	36%
18-24	62%	9%	29%
25-34	54%	12%	34%
35-44	51%	14%	36%
45-54	43%	18%	39%
55+	31%	24%	45%
Males: 18+	45%	14%	41%
Females: 18+	52%	17%	31%

Legend: ■ All Smartphones ■ All Tablets ■ Desktop
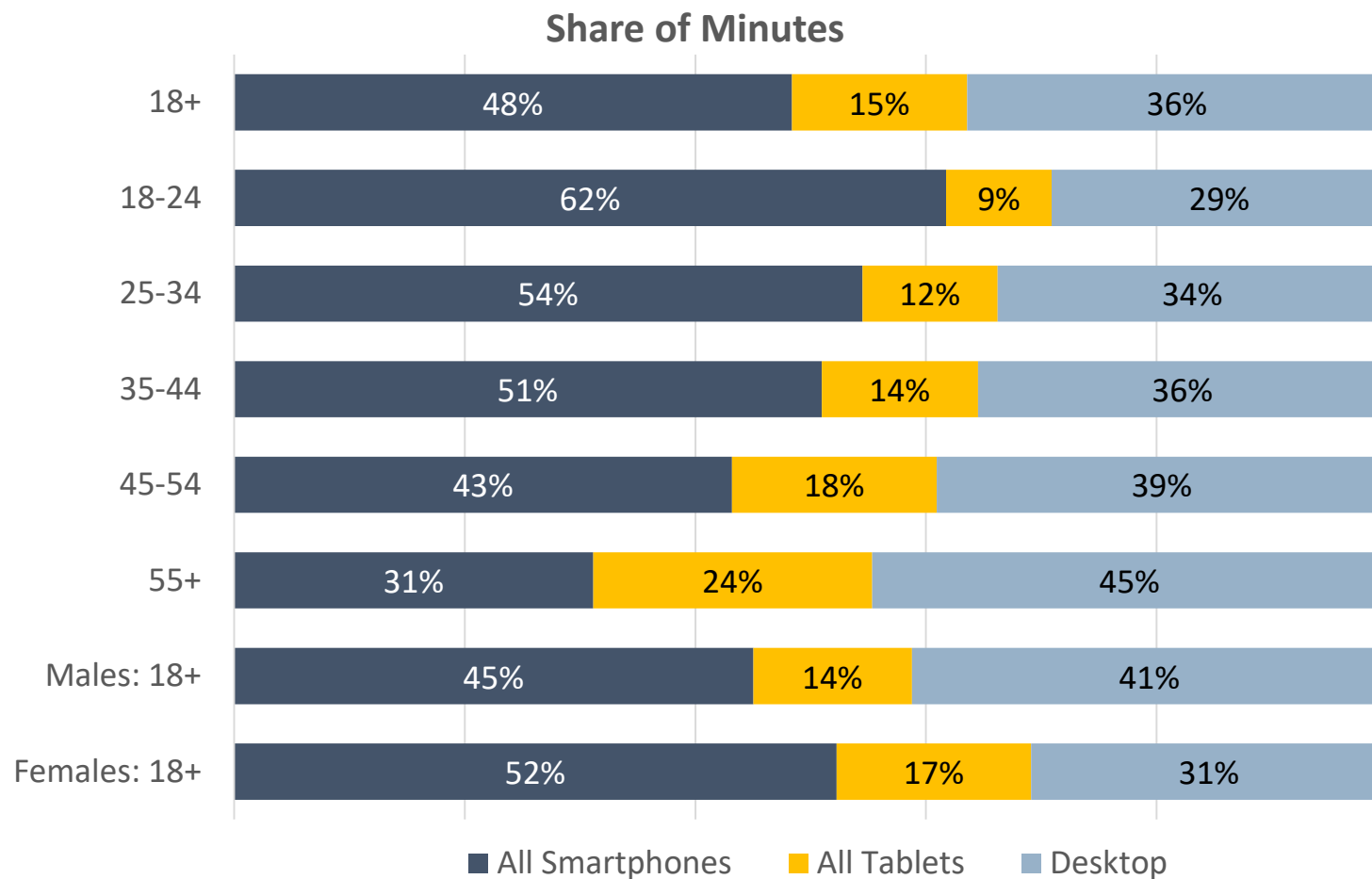
Females 18+ spend 69% of their time online on mobile devices compared to only 59% for males. The smartphone takes the lion's share of minutes for females 18+.

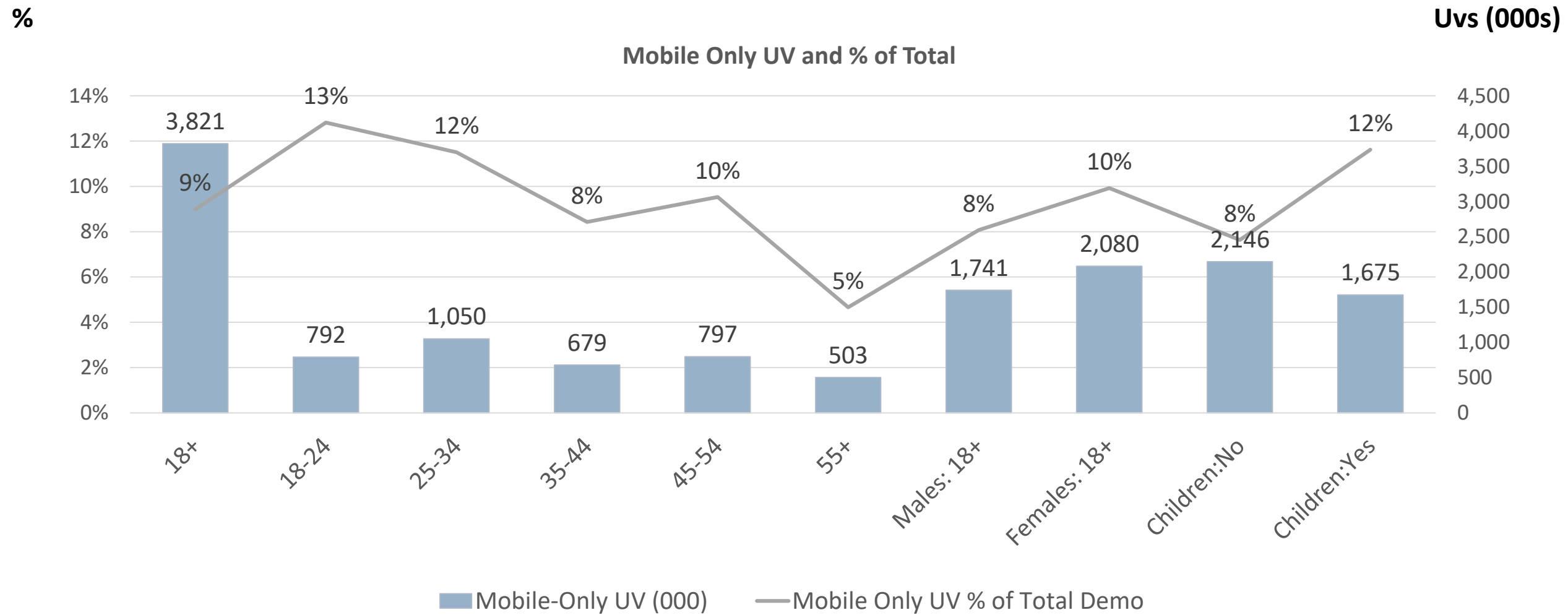Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Source: comScore MMX Multi-Platform, March 2017, 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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Nearly 4m adults do not use a desktop/laptop to access the internet
Younger audiences, females & parents most likely to be 'mobile only'

% **Uvs (000s)**

Mobile Only UV and % of Total

Category	Mobile-Only UV (000)	Mobile Only UV % of Total Demo
18+	3,821	9%
18-24	792	13%
25-34	1,050	12%
35-44	679	8%
45-54	797	10%
55+	503	5%
Males: 18+	1,741	8%
Females: 18+	2,080	10%
Children:No	2,146	8%
Children:Yes	1,675	12%

Mobile-Only UV (000)　　Mobile Only UV % of Total Demo

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Top Properties – Total Digital Population

Top 20 Properties by 'Unique Visitors' - Total Digital Population (TDP)
Telegraph & ESI Media re-enter the top 20.

Total Unique Visitors/Viewers (000s)

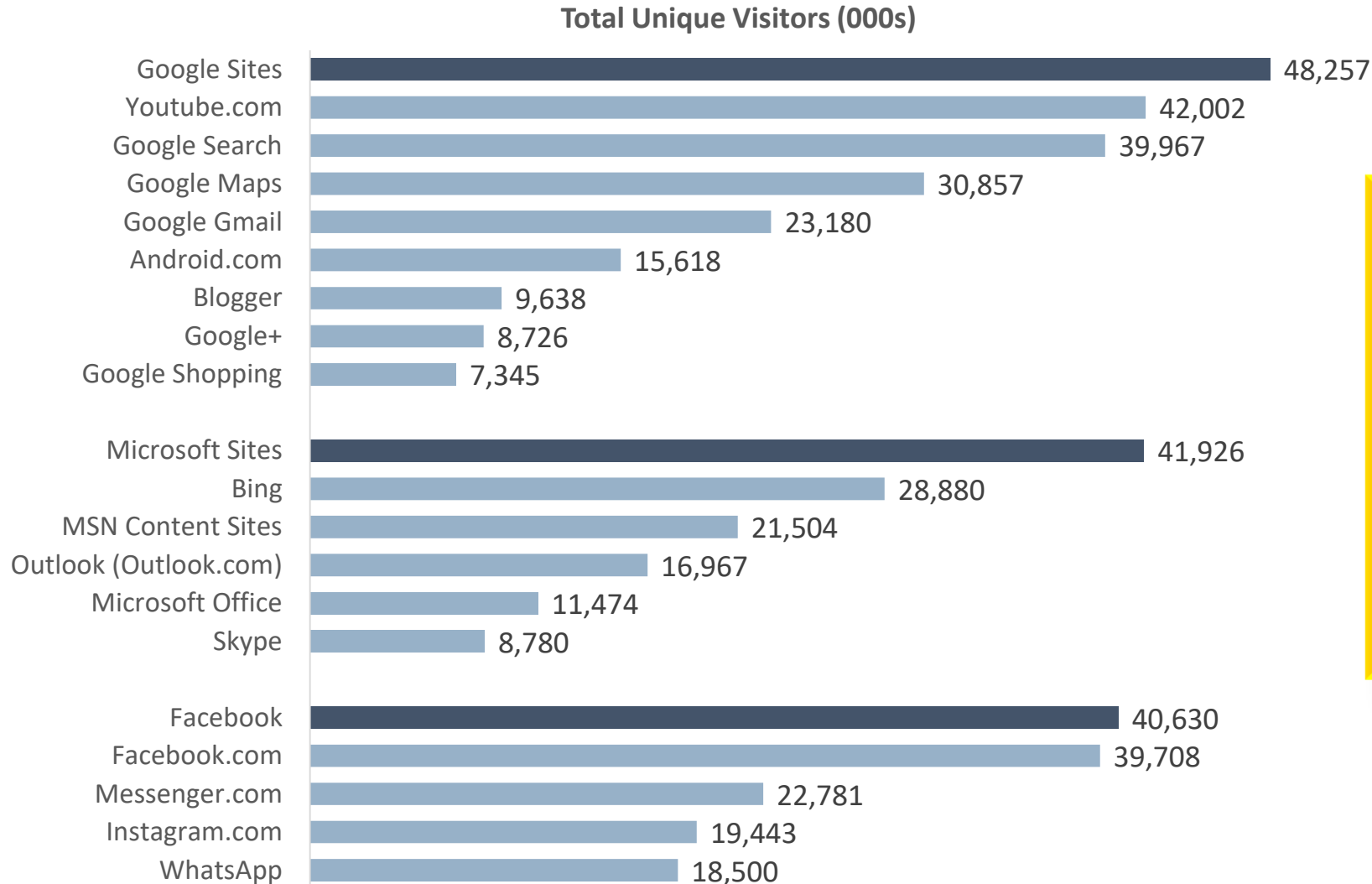| Property	Value
Google Sites	48,257
Microsoft Sites	41,926
Facebook	40,630
BBC Sites	39,546
Amazon Sites	37,926
Trinity Mirror Group	31,430
Yahoo Sites	31,319
eBay	31,250
Mail Online / Daily Mail	30,125
Sky Sites	29,192
News UK Sites	28,817
TripAdvisor Inc.	27,685
Apple Inc.	27,242
Wikimedia Foundation Sites	24,920
Linkedin	23,218
Telegraph Media Group	23,004
The Guardian	22,971
Independent & Evening Standard...	22,791
Twitter	22,032
PayPal	20,694

The top 3 all have an online reach of over 80%. Google extends it's reach to 95.8%

The AOL & Microsoft display advertising sales partnership gives AOL a combined audience of 37.7m or 74.8% reach in March

Tesco and Home Retail group (Argos) both drop out of the Top 20 as ESI Media & Telegraph Media Group re-enter
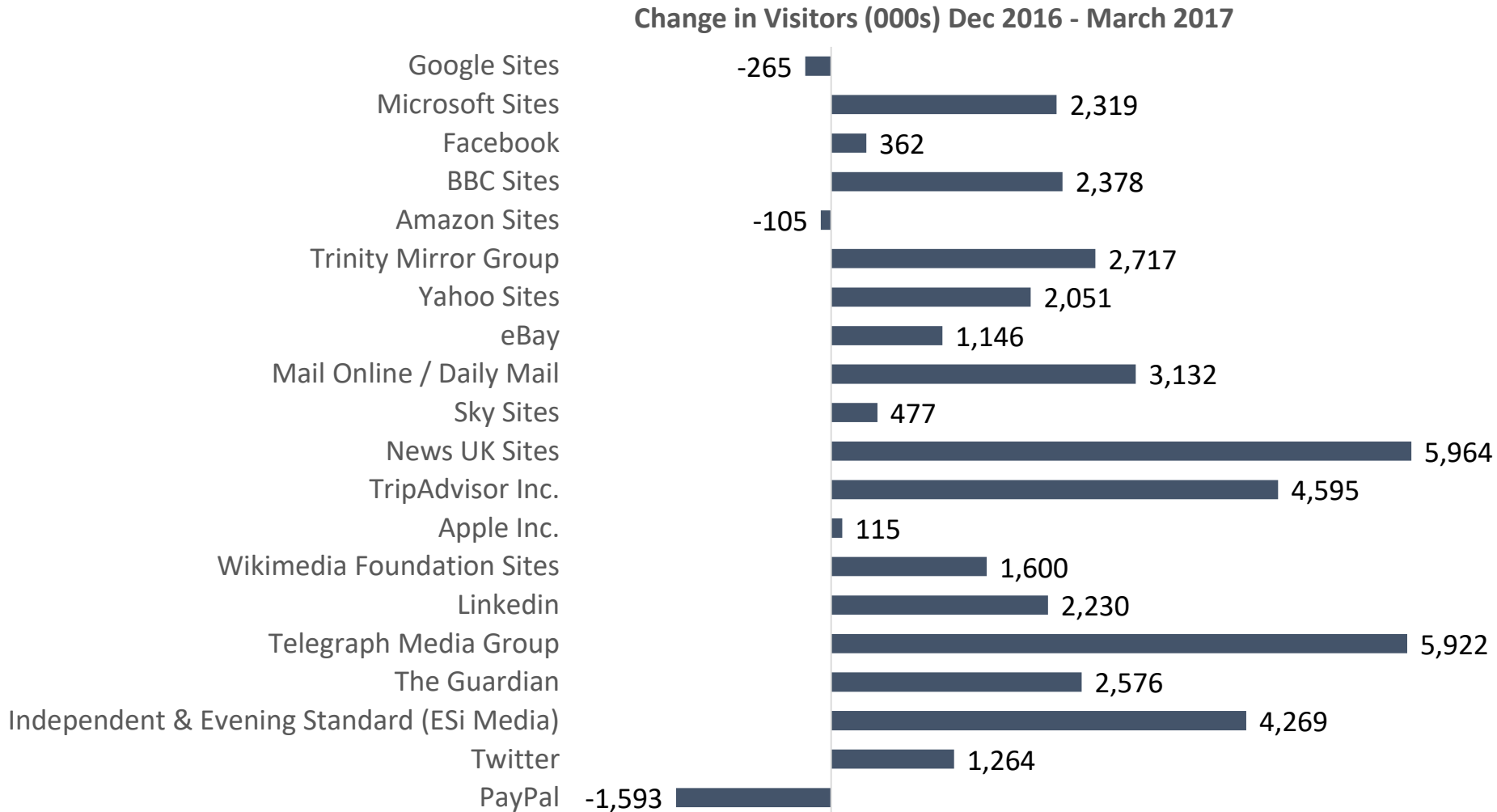
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Audience Breakdown of Top 3 Sites
YouTube alone reaches more than all Facebook Properties combined

Total Unique Visitors (000s)

Site	Visitors
Google Sites	48,257
Youtube.com	42,002
Google Search	39,967
Google Maps	30,857
Google Gmail	23,180
Android.com	15,618
Blogger	9,638
Google+	8,726
Google Shopping	7,345
Microsoft Sites	41,926
Bing	28,880
MSN Content Sites	21,504
Outlook (Outlook.com)	16,967
Microsoft Office	11,474
Skype	8,780
Facebook	40,630
Facebook.com	39,708
Messenger.com	22,781
Instagram.com	19,443
WhatsApp	18,500

95.8% of the UK online population used Google.

YouTube alone reaches more than all Facebook properties combined (FB, Instagram & WhatsApp) and has grown by over ½ million since December.

Source: comScore MMX Multi-Platform, Jan 2017, 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.

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Key Unique Visitor Changes Dec 2016 to March 2017: Top 20 Properties

Change in Visitors (000s) Dec 2016 - March 2017

Property	Change
Google Sites	-265
Microsoft Sites	2,319
Facebook	362
BBC Sites	2,378
Amazon Sites	-105
Trinity Mirror Group	2,717
Yahoo Sites	2,051
eBay	1,146
Mail Online / Daily Mail	3,132
Sky Sites	477
News UK Sites	5,964
TripAdvisor Inc.	4,595
Apple Inc.	115
Wikimedia Foundation Sites	1,600
Linkedin	2,230
Telegraph Media Group	5,922
The Guardian	2,576
Independent & Evening Standard (ESi Media)	4,269
Twitter	1,264
PayPal	-1,593

Methodology enhancements* and big news (Trump and Westminster Attacks) contributed to gains in 2017. News UK included Wireless Group from Feb 2017 following acquisition
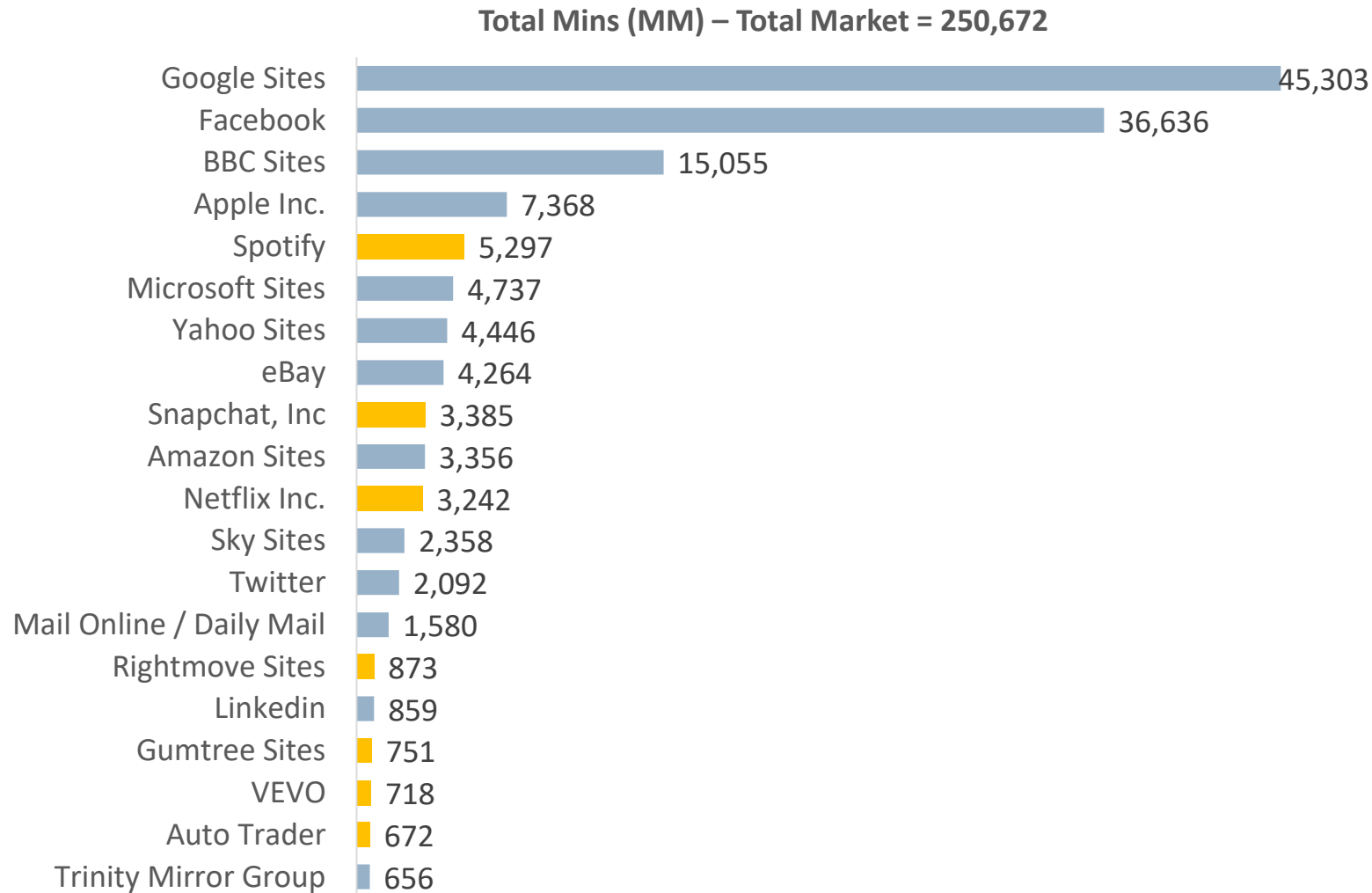
Paypal, Amazon and Google saw decreases due to retail seasonality (Google shopping impacted Google)

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.

*comScore methodology changes have impacted brand level data. For full details of changes see appendix

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Top 20 Properties by 'Time Spent*' – Total Digital Population (TDP)
Property & Job Sites show big uplifts in time online v Dec 2016

Total Mins (MM) – Total Market = 250,672

| Property	Total Mins (MM)
Google Sites	45,303
Facebook	36,636
BBC Sites	15,055
Apple Inc.	7,368
Spotify	5,297
Microsoft Sites	4,737
Yahoo Sites	4,446
eBay	4,264
Snapchat, Inc	3,385
Amazon Sites	3,356
Netflix Inc.	3,242
Sky Sites	2,358
Twitter	2,092
Mail Online / Daily Mail	1,580
Rightmove Sites	873
Linkedin	859
Gumtree Sites	751
VEVO	718
Auto Trader	672
Trinity Mirror Group	656

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

Social Media & Entertainment categories drive minutes.

Linkedin (+87%) & Rightmove (+66%) experienced big gains v December as the New year prompts job and property searches. Outside the top 20, Indeed & Zoopla also show big growth for total minutes

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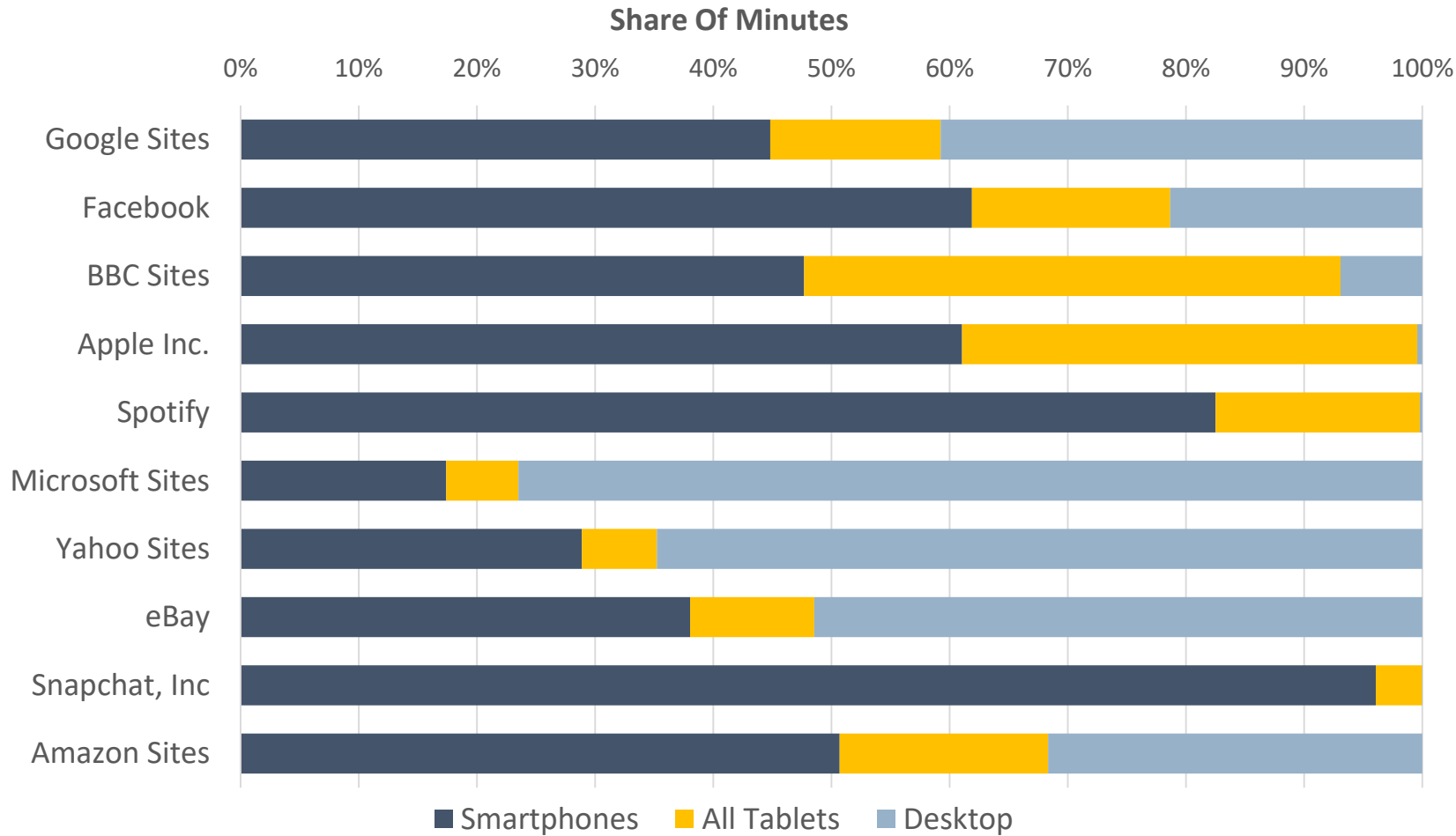
Snapchat, Apple & Spotify have the greatest share of time on mobile devices

BBC & Apple have highest Tablet share out of top 10

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

Legend: ■ Smartphones ■ All Tablets ■ Desktop

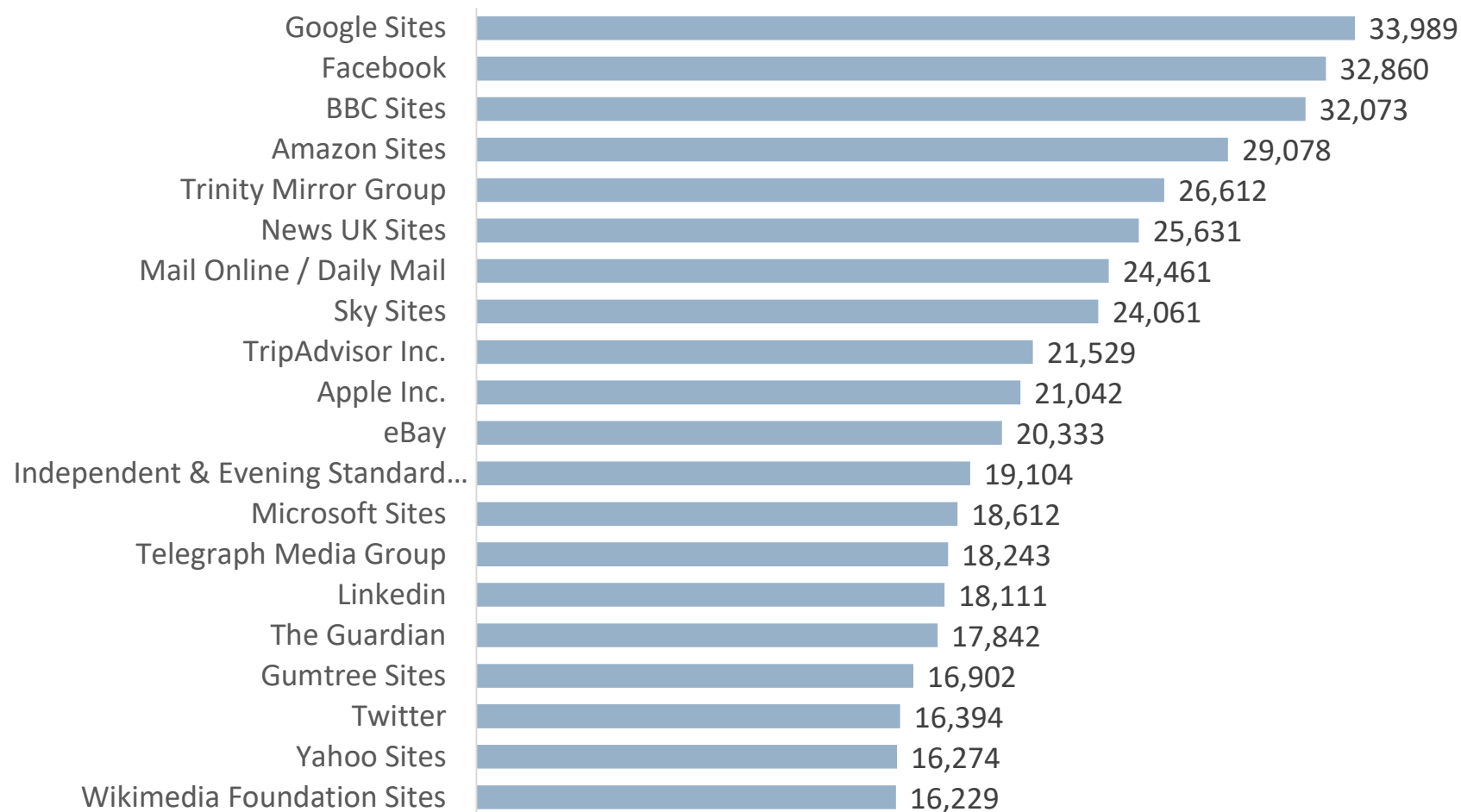Source: comScore MMX Multi-Platform March 2017, UK, Based on age 18+

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

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Top Properties – Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors
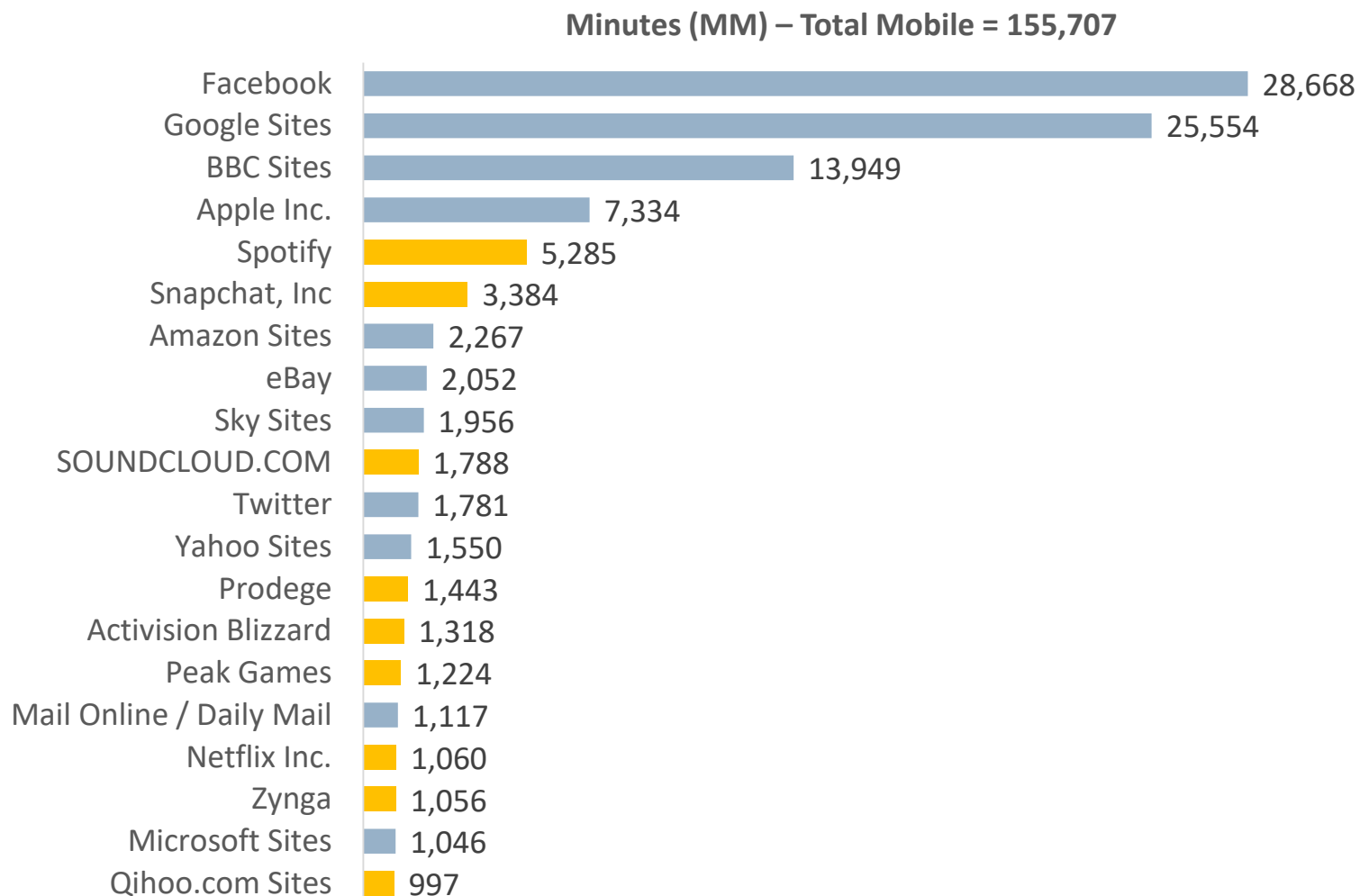## 36m adults accessed mobile content in March 2017 (via browser and app)

Total Unique Visitors/Viewers (000s) – Total Mobile (18+) = 36,243

Property	Unique Visitors (000s)
Google Sites	33,989
Facebook	32,860
BBC Sites	32,073
Amazon Sites	29,078
Trinity Mirror Group	26,612
News UK Sites	25,631
Mail Online / Daily Mail	24,461
Sky Sites	24,061
TripAdvisor Inc.	21,529
Apple Inc.	21,042
eBay	20,333
Independent & Evening Standard...	19,104
Microsoft Sites	18,612
Telegraph Media Group	18,243
Linkedin	18,111
The Guardian	17,842
Gumtree Sites	16,902
Twitter	16,394
Yahoo Sites	16,274
Wikimedia Foundation Sites	16,229

Telegraph Media re-enters the top 20 at the expense of PayPal

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

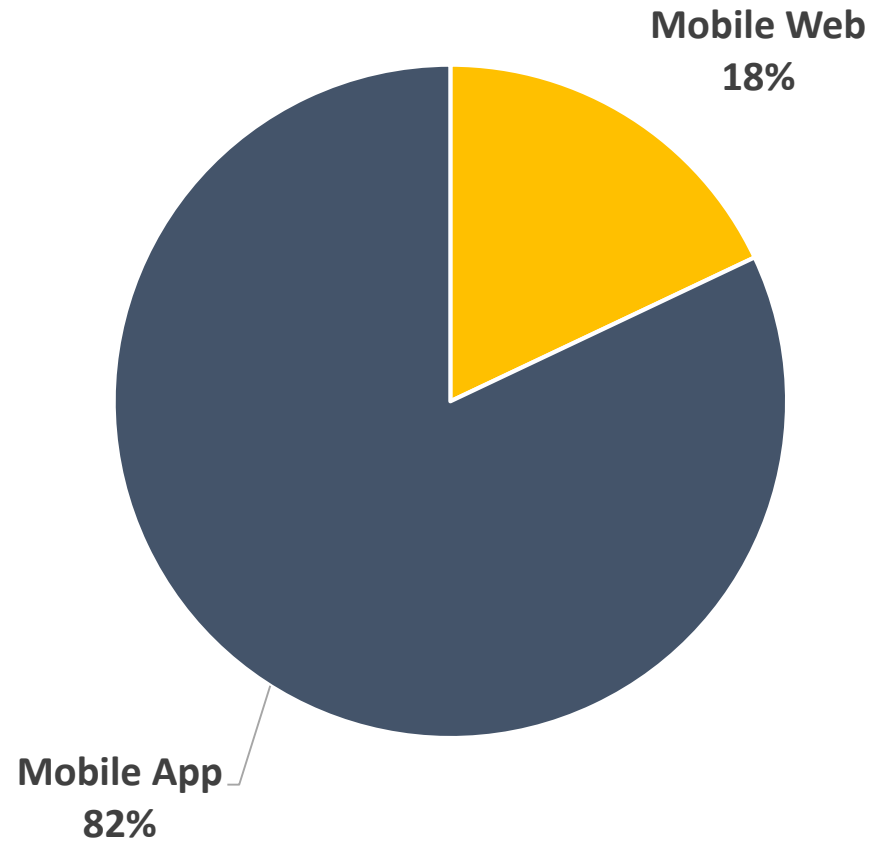**Minutes (MM) – Total Mobile = 155,707**

Property	Minutes (MM)
Facebook	28,668
Google Sites	25,554
BBC Sites	13,949
Apple Inc.	7,334
Spotify	5,285
Snapchat, Inc	3,384
Amazon Sites	2,267
eBay	2,052
Sky Sites	1,956
SOUNDCLOUD.COM	1,788
Twitter	1,781
Yahoo Sites	1,550
Prodege	1,443
Activision Blizzard	1,318
Peak Games	1,224
Mail Online / Daily Mail	1,117
Netflix Inc.	1,060
Zynga	1,056
Microsoft Sites	1,046
Qihoo.com Sites	997

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

Source: comScore Mobile Metrix, March 2017, 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
18%

Mobile App
82%
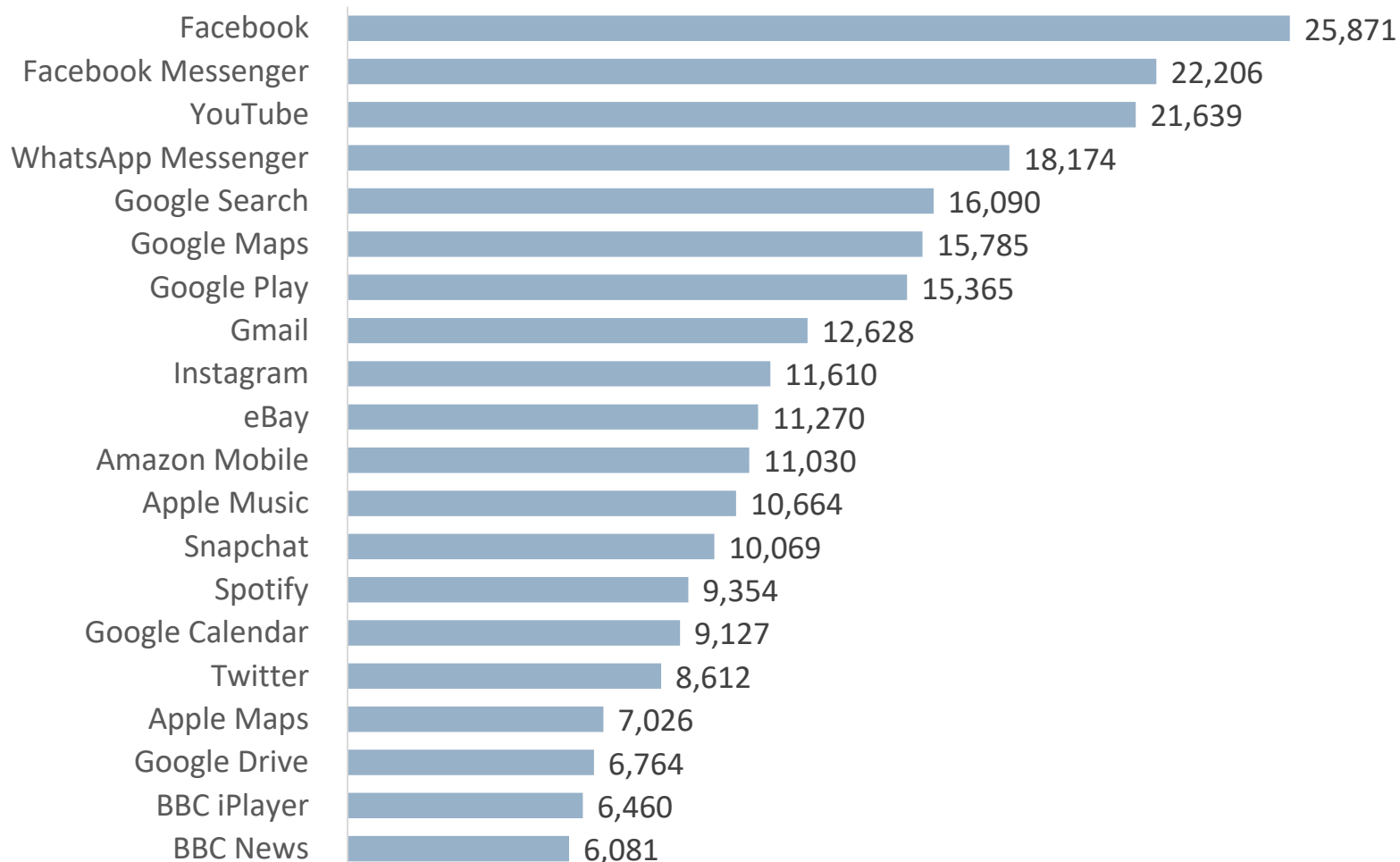
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Top 20 Mobile Apps ranked by Unique Visitors
33.3m adults accessed a mobile app in March 2017

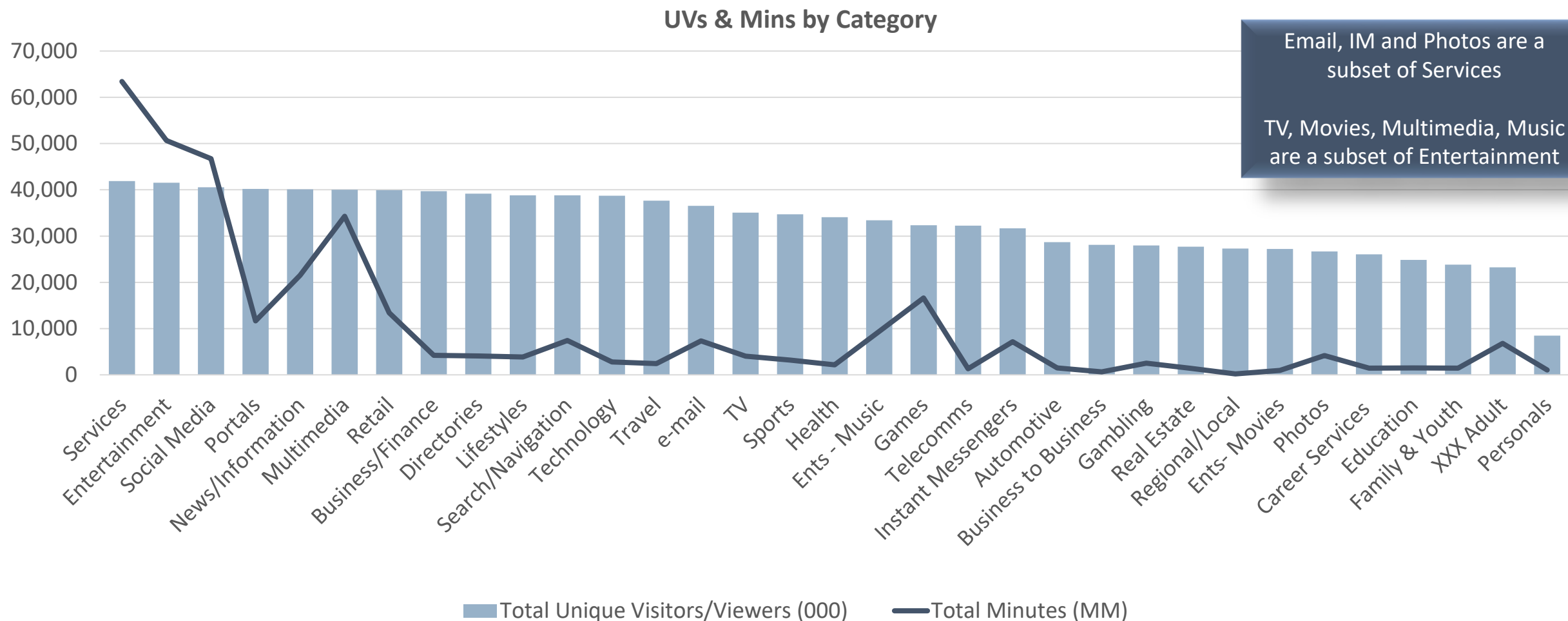**Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 33.3m**

App	Unique Visitors (000s)
Facebook	25,871
Facebook Messenger	22,206
YouTube	21,639
WhatsApp Messenger	18,174
Google Search	16,090
Google Maps	15,785
Google Play	15,365
Gmail	12,628
Instagram	11,610
eBay	11,270
Amazon Mobile	11,030
Apple Music	10,664
Snapchat	10,069
Spotify	9,354
Google Calendar	9,127
Twitter	8,612
Apple Maps	7,026
Google Drive	6,764
BBC iPlayer	6,460
BBC News	6,081

The top 9 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

Categories (x-axis): Services, Entertainment, Social Media, Portals, News/Information, Multimedia, Retail, Business/Finance, Directories, Lifestyles, Search/Navigation, Technology, Travel, e-mail, TV, Sports, Health, Ents - Music, Games, Telecomms, Instant Messengers, Automotive, Business to Business, Gambling, Real Estate, Regional/Local, Ents- Movies, Photos, Career Services, Education, Family & Youth, XXX Adult, Personals

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

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Platform's share of time online differs by category

Desktop total
37%

Smartphone total
48%

Tablet total
15%

Autos Manufacturer	92%		Job Search	94%		TV	49%
Auctions	92%		Photos	90%		General News	42%
Career –Training/Education	91%		Instant Messenger	90%		News/Information	36%
Computer Software	91%		Retail - Music	86%		Kids	32%
Car Rental	89%		Coupons	85%		Radio	25%
Business to Business	82%		Maps	80%		Online Gaming	25%
Entertainment - Movies	80%		Books	77%		Games	24%
Government	79%		Entertainment - Music	74%		Family & Youth	23%
Online Trading	78%		Health	73%		Books	21%
Airlines	77%		Personals	70%		Real Estate	19%

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Key Category Changes Dec 2016 to March 2017

Top 5 % Growth Categories: Visitors & Minutes March 2017 v Dec 2016
Career & Property sites are in the top 3 for both Visitors and Time Spent

Unique Visitors % Increase
Dec 2016 to March 2017

Category	Value
Automotive	25
Career Services and Development	23
Real Estate	17
Government	15
Health	11
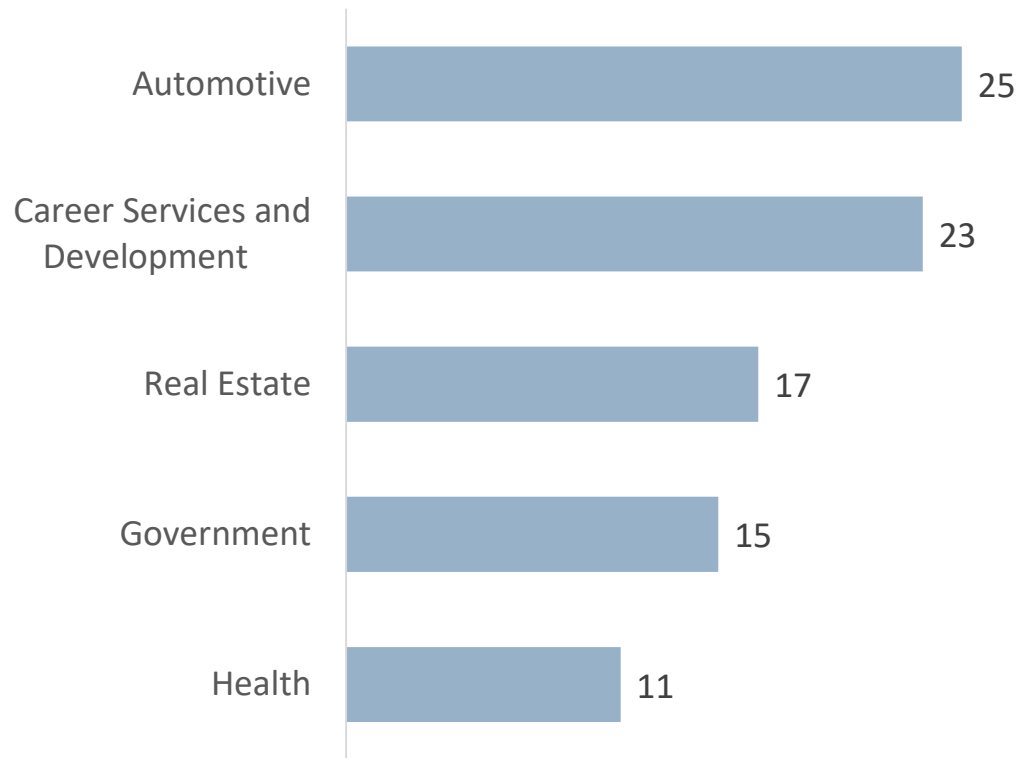
Minutes % Increase
Dec 2016 to March 2017

Category	Value
Real Estate	67
Education	63
Career Services and Development	63
Automotive	57
Travel	43

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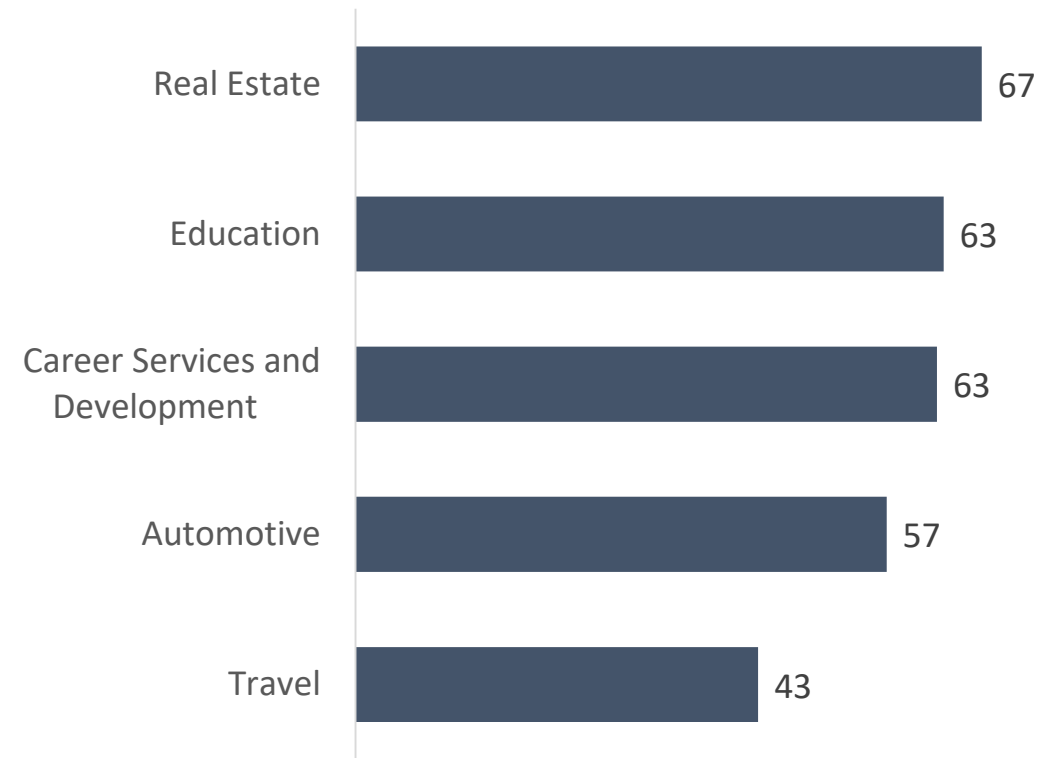
Biggest Visitor CATEGORY Declines: March 2017 v Dec 2016
Unsurprisingly, sites within the retail category suffered the biggest declines

Biggest UV Declines (000s) March 2017 v Dec 2016

Category	Decline
Retail - Mall	-6,242
Toys	-5,321
Department Stores	-4,994
Consumer Electronics	-4,100
Jewellery/Luxury Goods	-3,547
Flowers/Gifts/Greetings	-3,487
Computer Hardware	-3,479
Online Gambling	-3,125
Comparison Shopping	-3,117
Fragrances/Cosmetics	-3,069
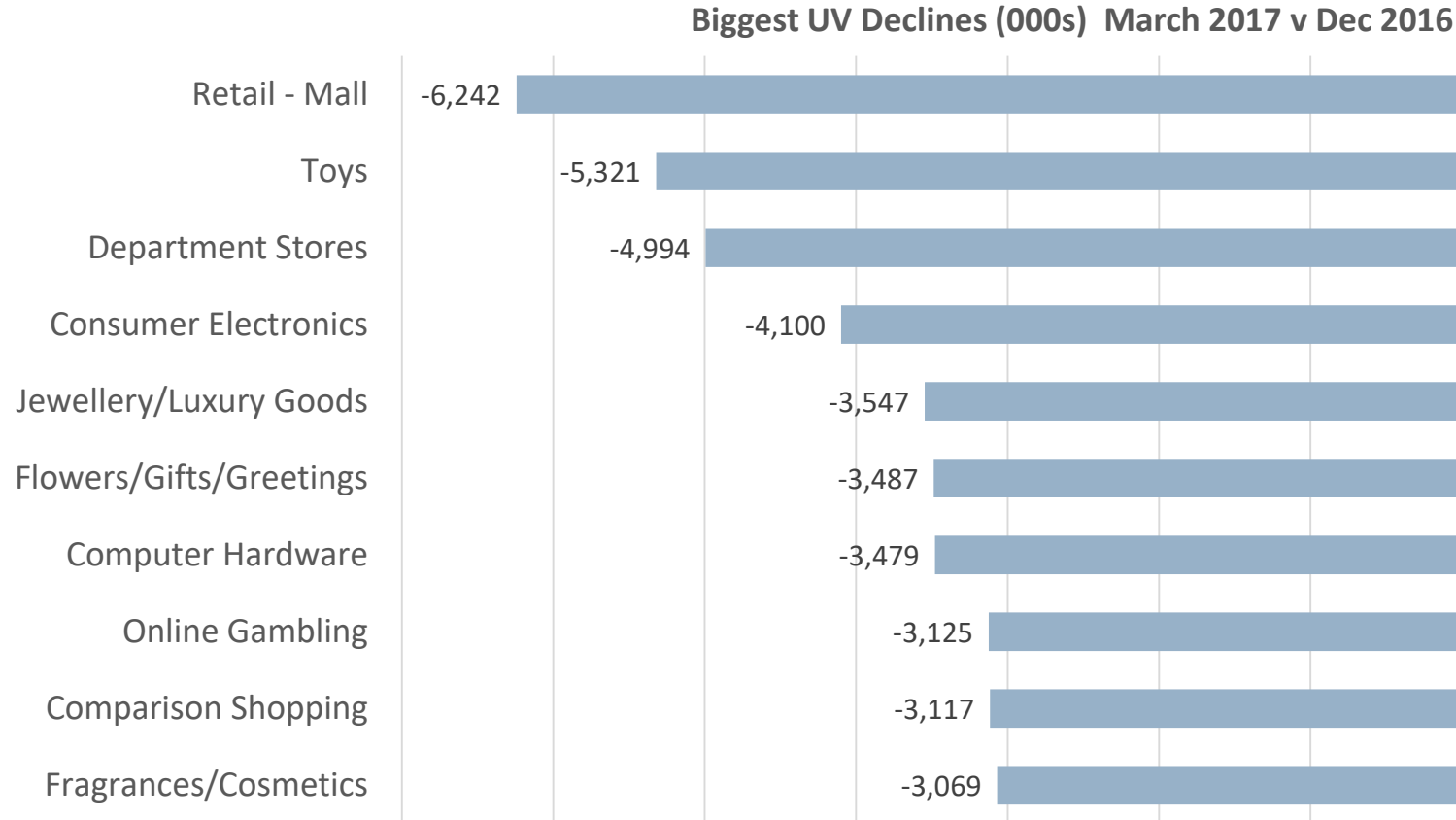
The Retail Category witnessed a 14% decline in Unique Visitors compared to December.

Toys, Jewellery and Fragrance retailers saw the biggest declines in % terms. Sites selling ecards also saw a 68% drop in visitors.

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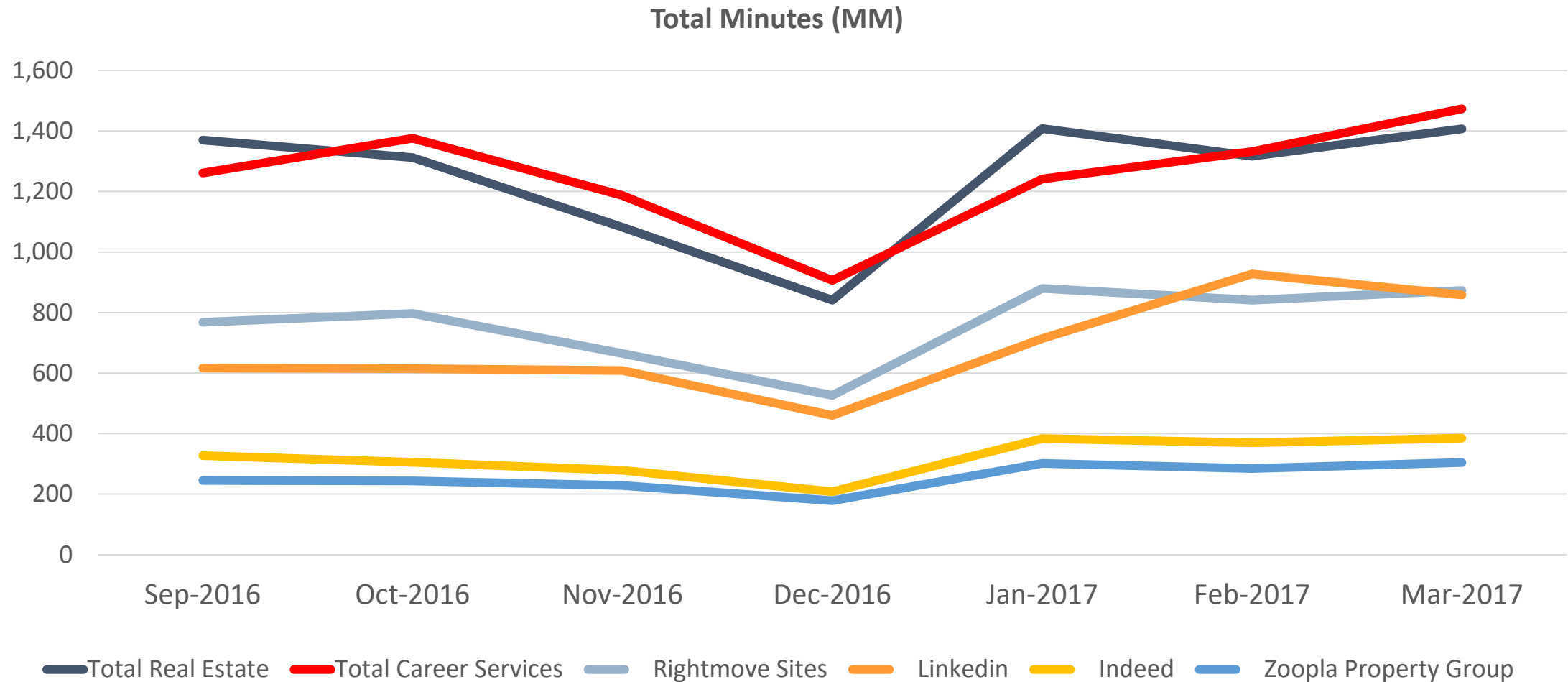
Questions?

Find out more at: http://www.ukom.uk.net/
Email us at: insights@ukom.uk.net

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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

Methodology Enhancements (January 2017)

- **Video**
  - VMX Multi-Platform launched (now includes tagged mobile streams – tho not yet integrated into MMX MP)
  - New YouTube data feed (incl. census duration) added to VMX Multi-Platform

- **Mobile**
  - MoMX reporting enhanced to include usage for 13 to 17 year olds where the publisher has deployed comScore tagging
  - Filtration of invalid traffic (IVT) and of iOS secure domains (panel-only, NEDOMs) enhanced
  - Enhancements on coverage calculations for mobile web and apps

- **All products**
  - Less stringent census data country assignment (via geo-IP) processing

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:
www.ukom.uk.net/

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