

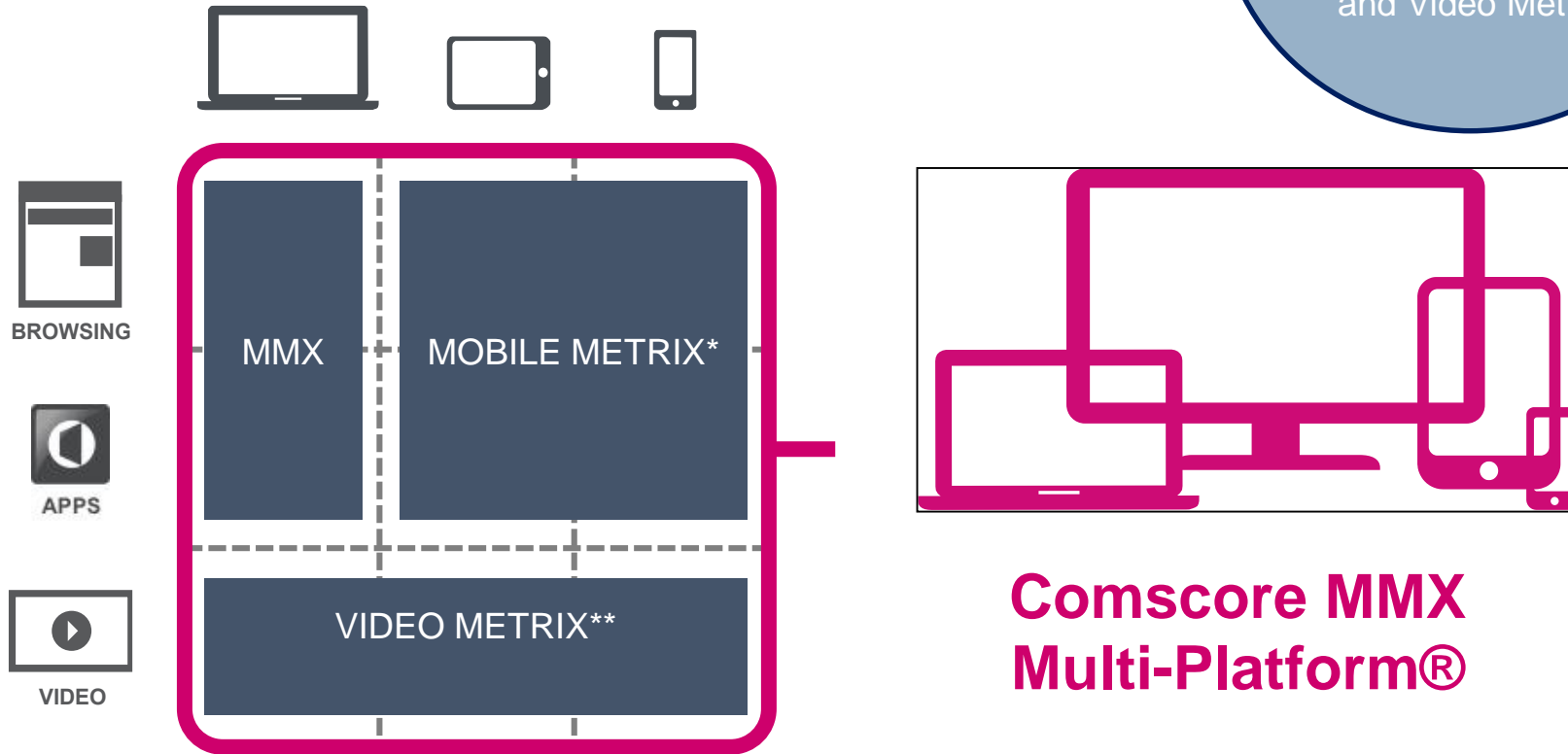
# UK Digital Market Overview September 2019



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

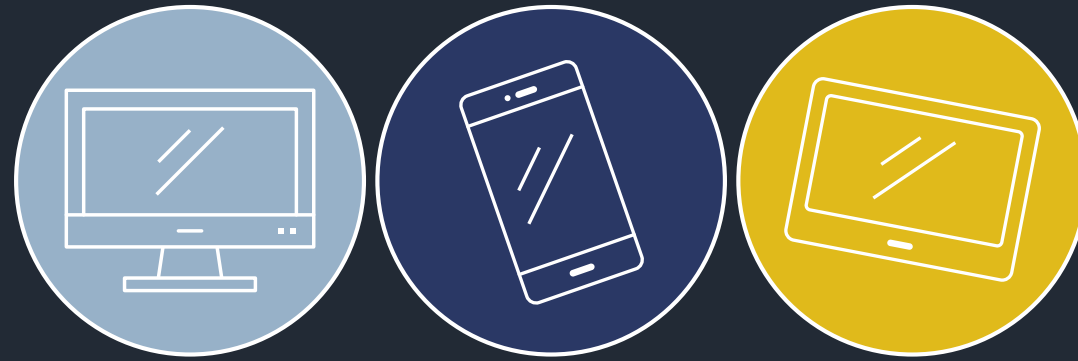
# A Guide to Data Sources

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



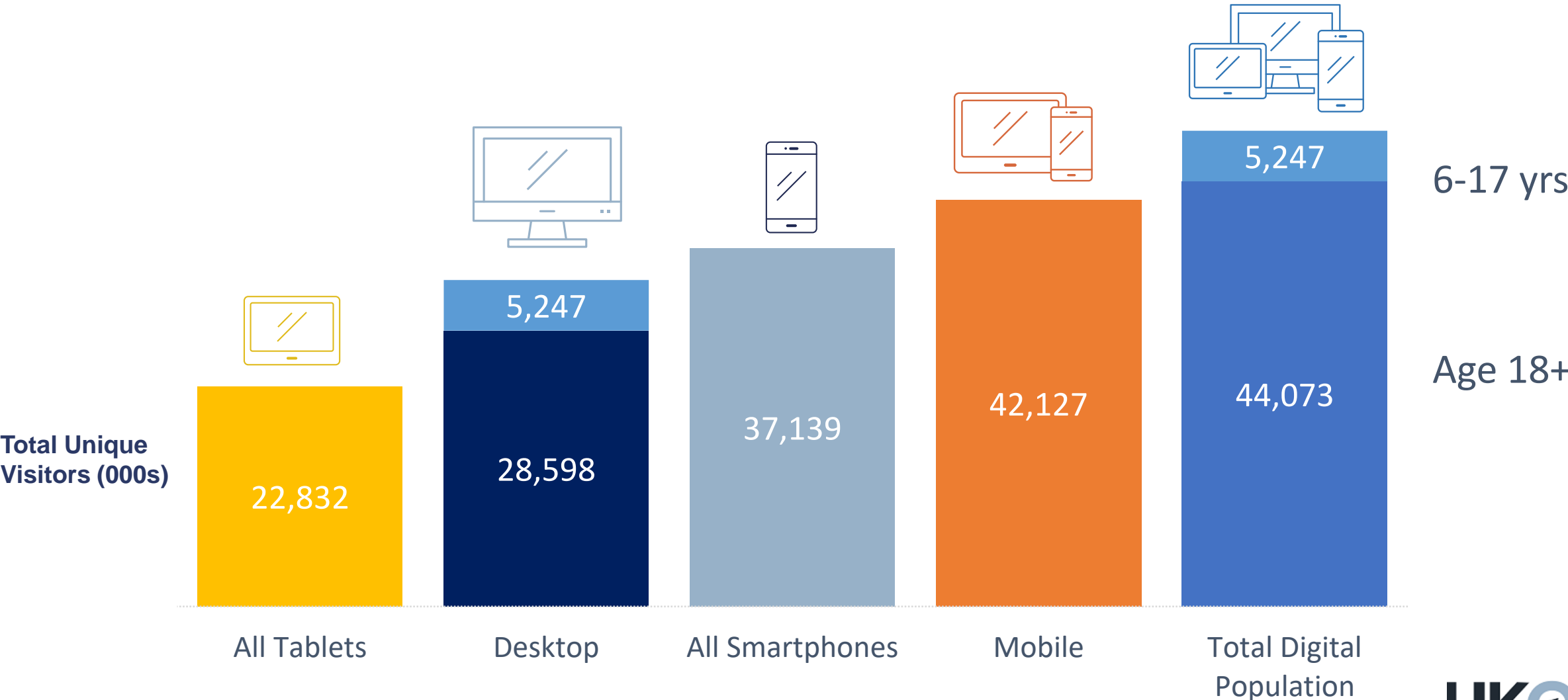
\*Please note that we use the term mobile to refer to smartphone and tablet usage combined

\*\*MMX Multi-Platform does not yet include mobile and tablet video. This is separately available in VMX-MP



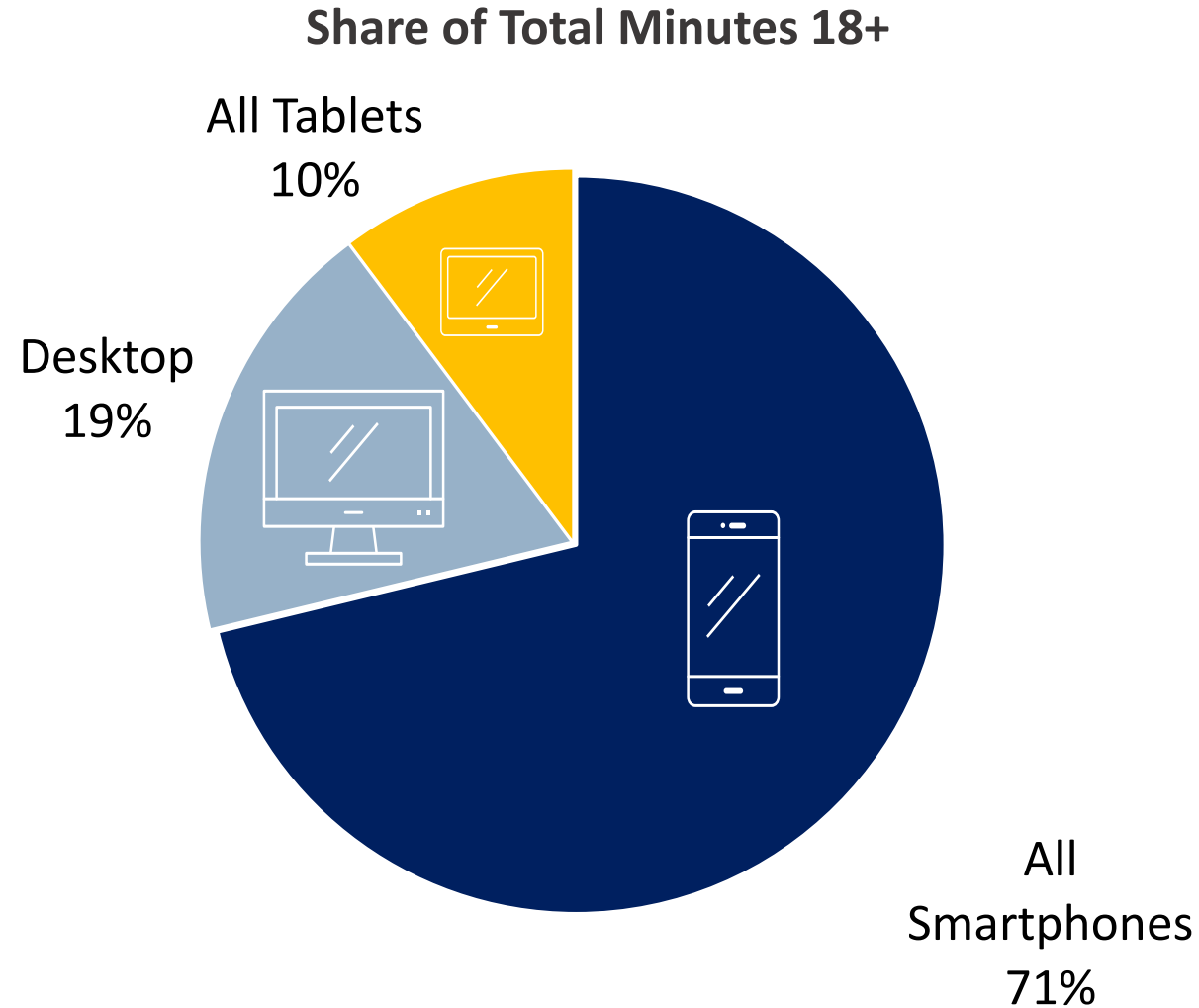
# Usage by Platform

# Breakdown of Digital Unique Visitors by Platform



# Share of Minutes by Platform

Mobile Devices now account for **81%** of all adult online minutes



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

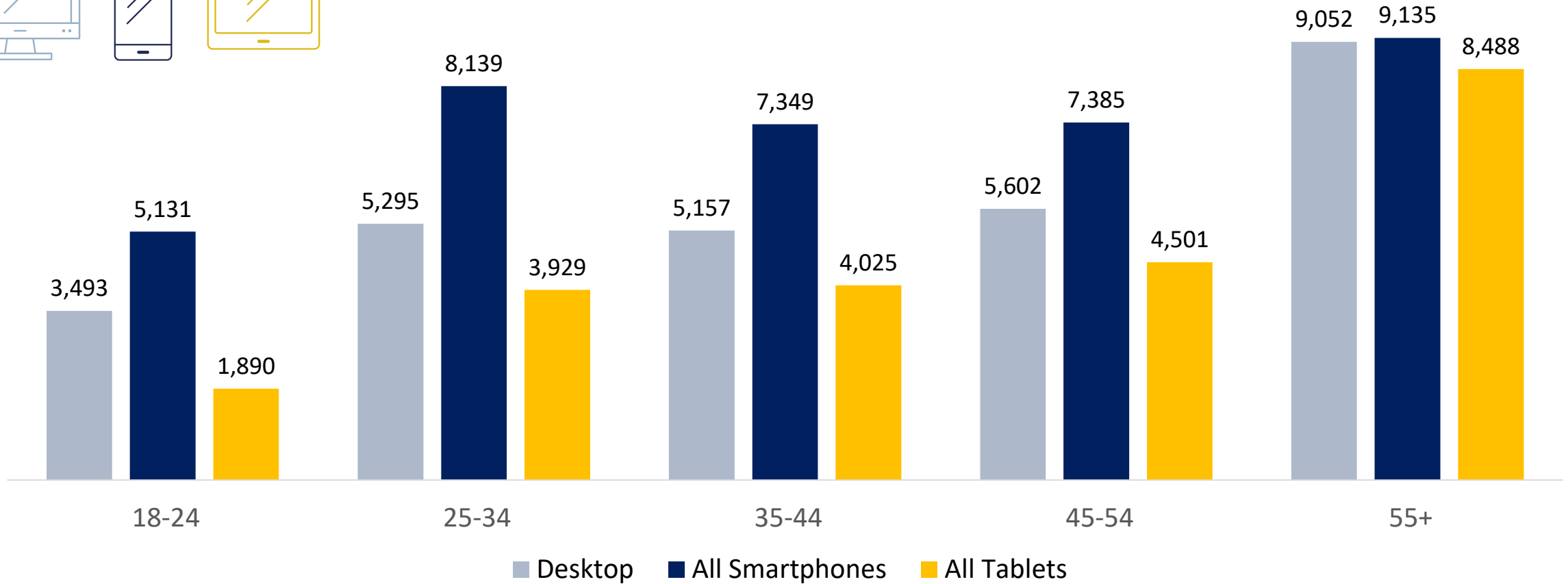
\*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

# Platform Unique Visitors by Age

## Smartphones have now overtaken desktops for the 55+ age group



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

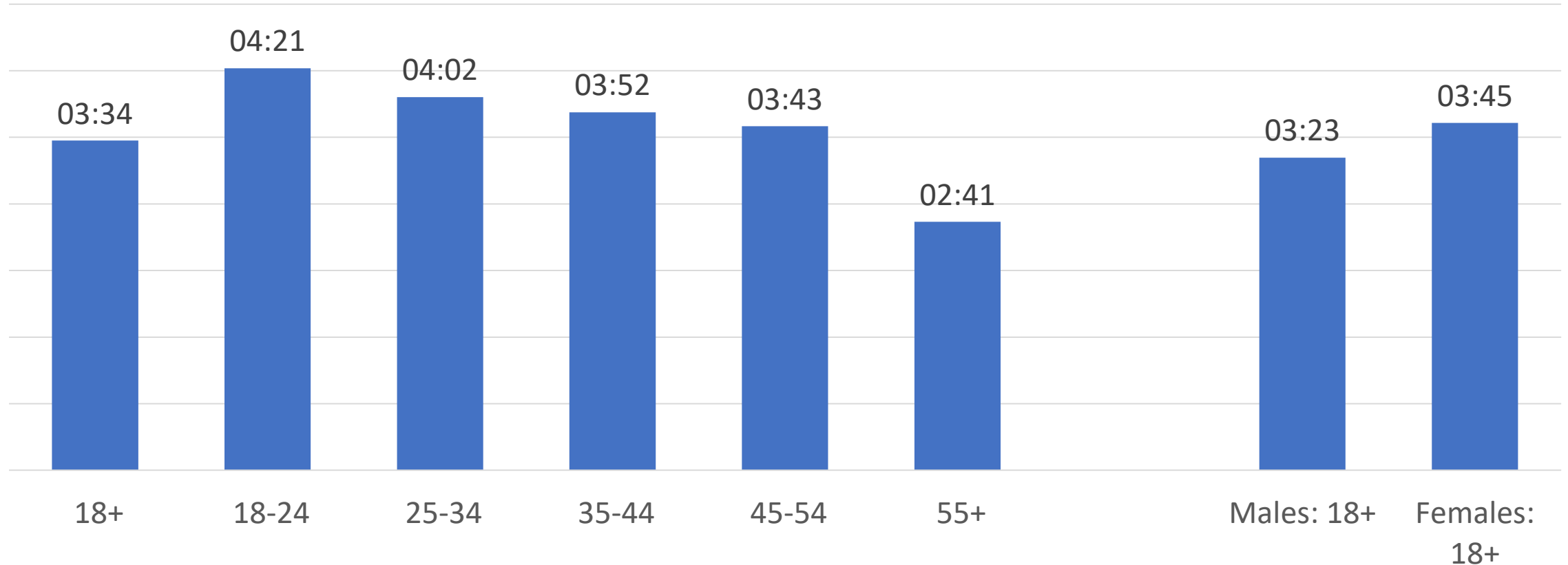


# Average Time Spent Online Per Day by Age & Gender

Average time spent online decreases with increasing age



Average Time Spent (Hrs:Mins) Per day by Age and Gender – Sept 2019

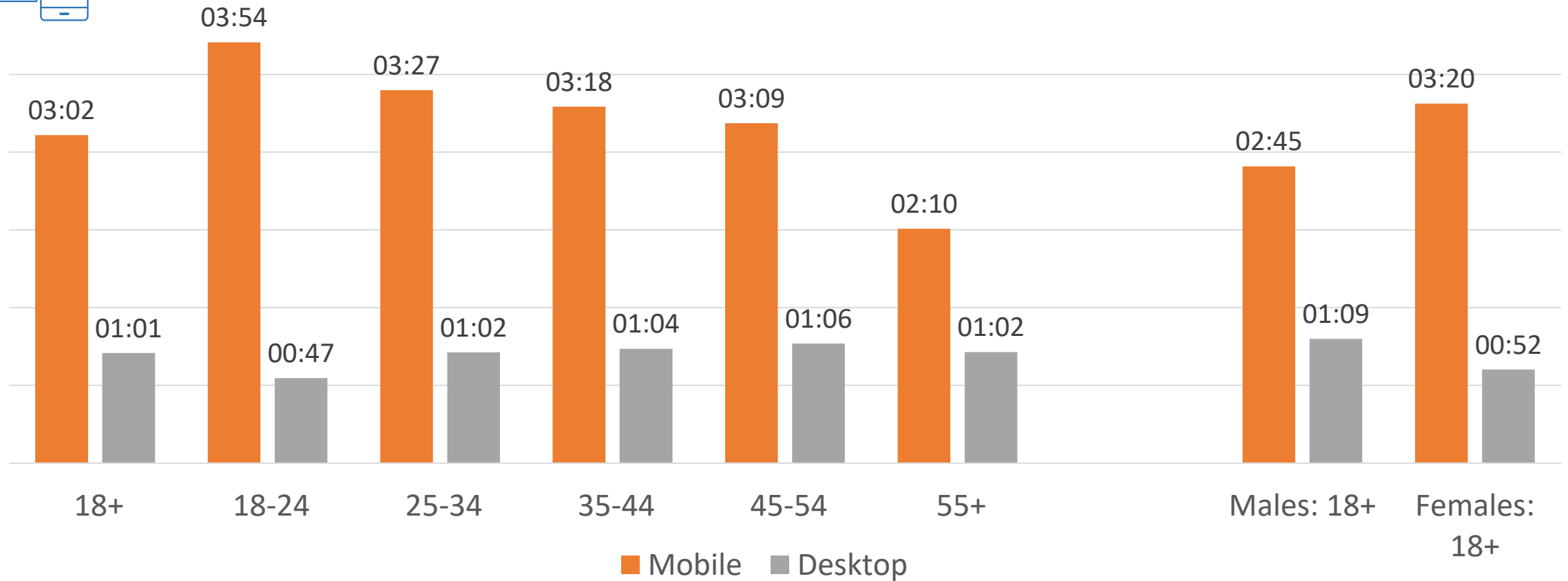


# Average Time Spent Online Per Day by Age & Gender

## Average time spent online decreases with increasing age



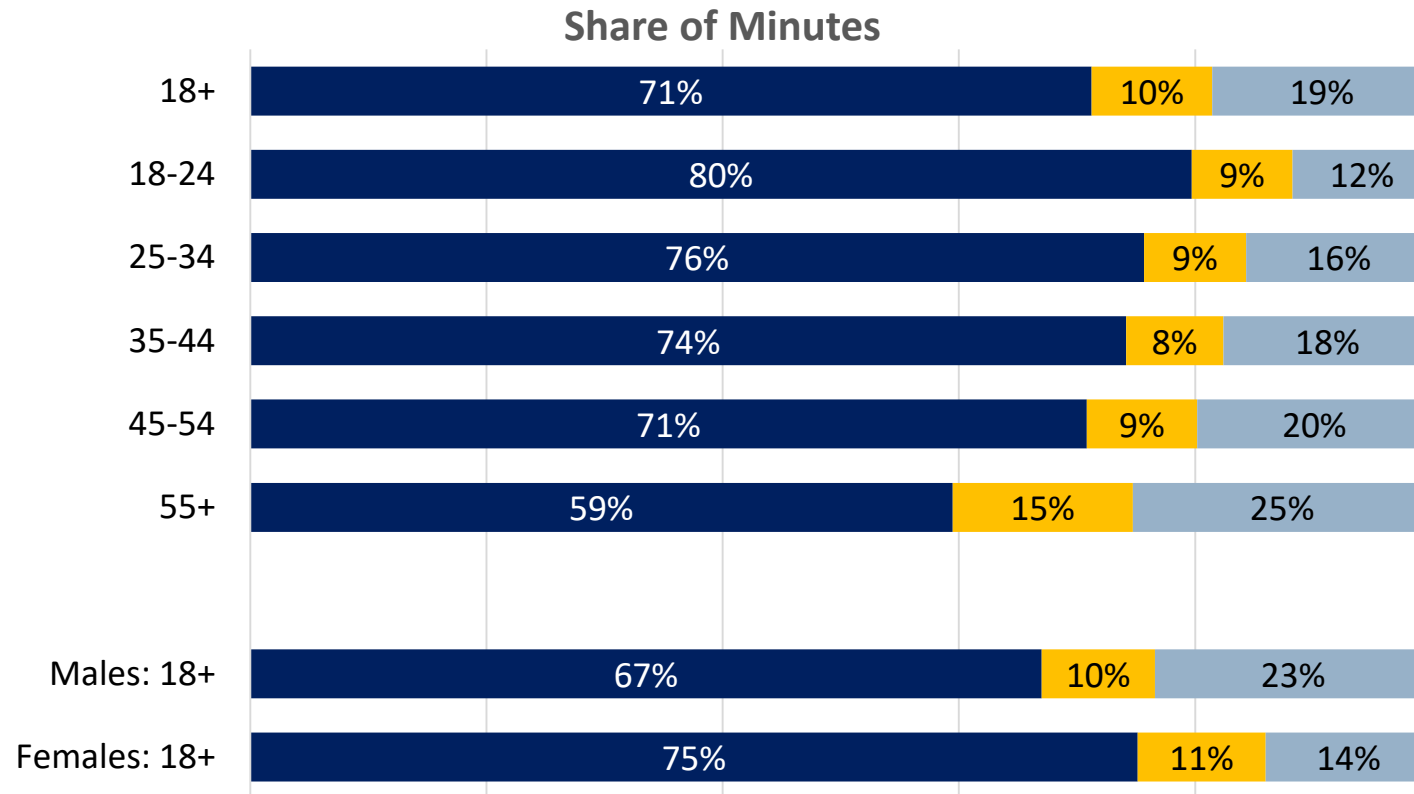
Average Time Spent (Hrs:Mins) Per day by Age and Gender – Sept 2019





# Platform Share of Minutes by Age & Gender

## Millennials & females spend greatest share of time on mobile devices



■ All Smartphones ■ All Tablets ■ Desktop



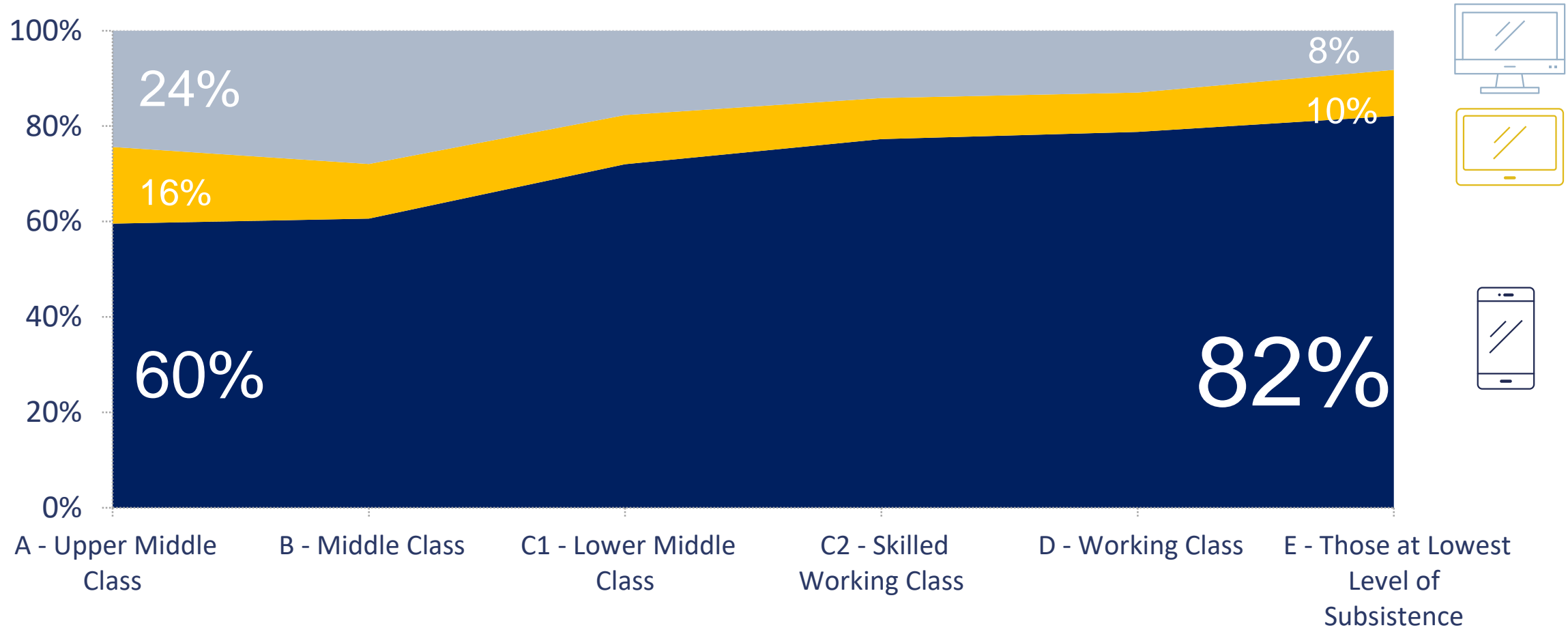
Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 86% of their time online on mobile devices compared to only 77% for males.

# Platform Share of Time Online by Social Grade

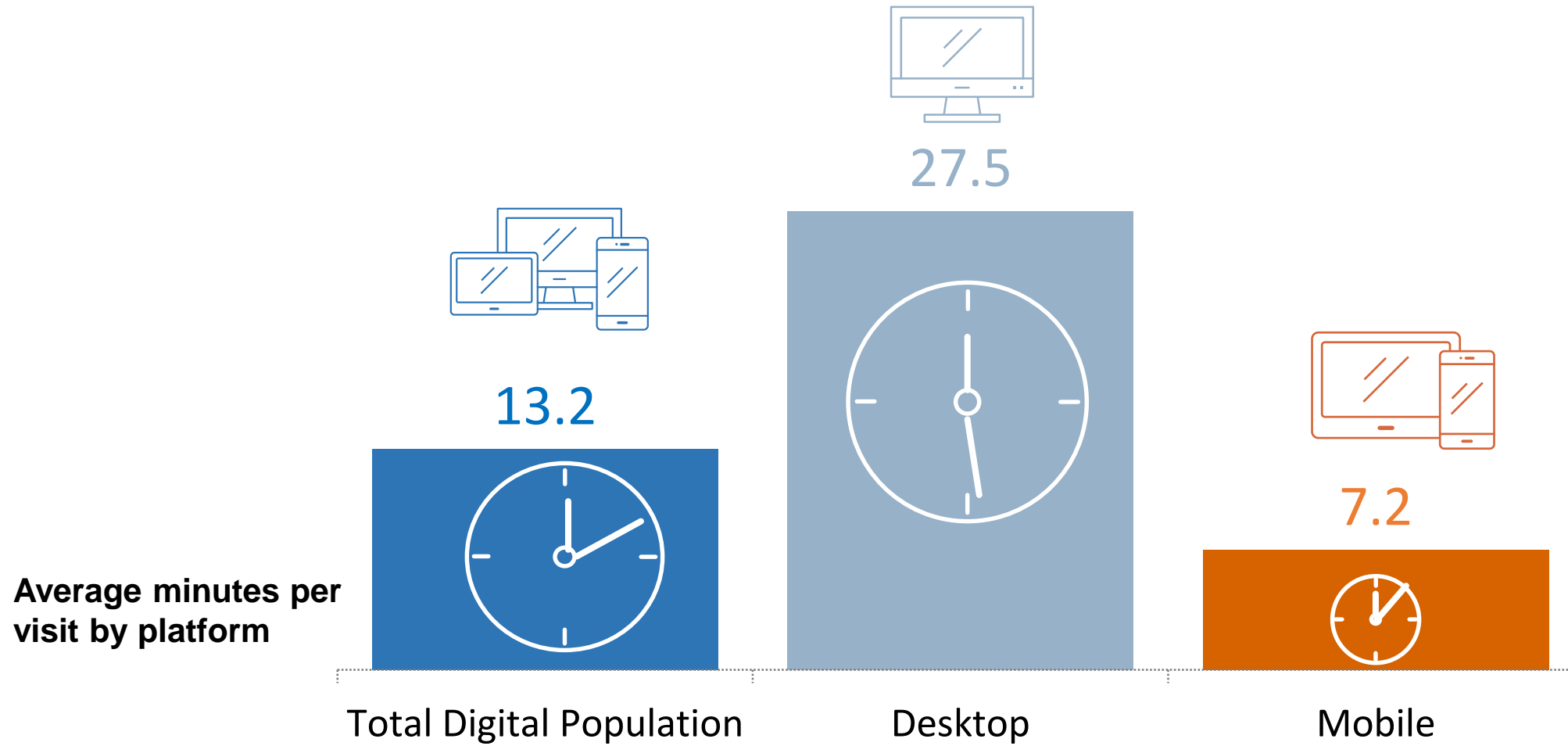
## Smartphone share increases as social grade decreases

Platform Share of Minutes by Social Grade



# Average Minutes per Visit by Platform

Mobile visits are **shorter**

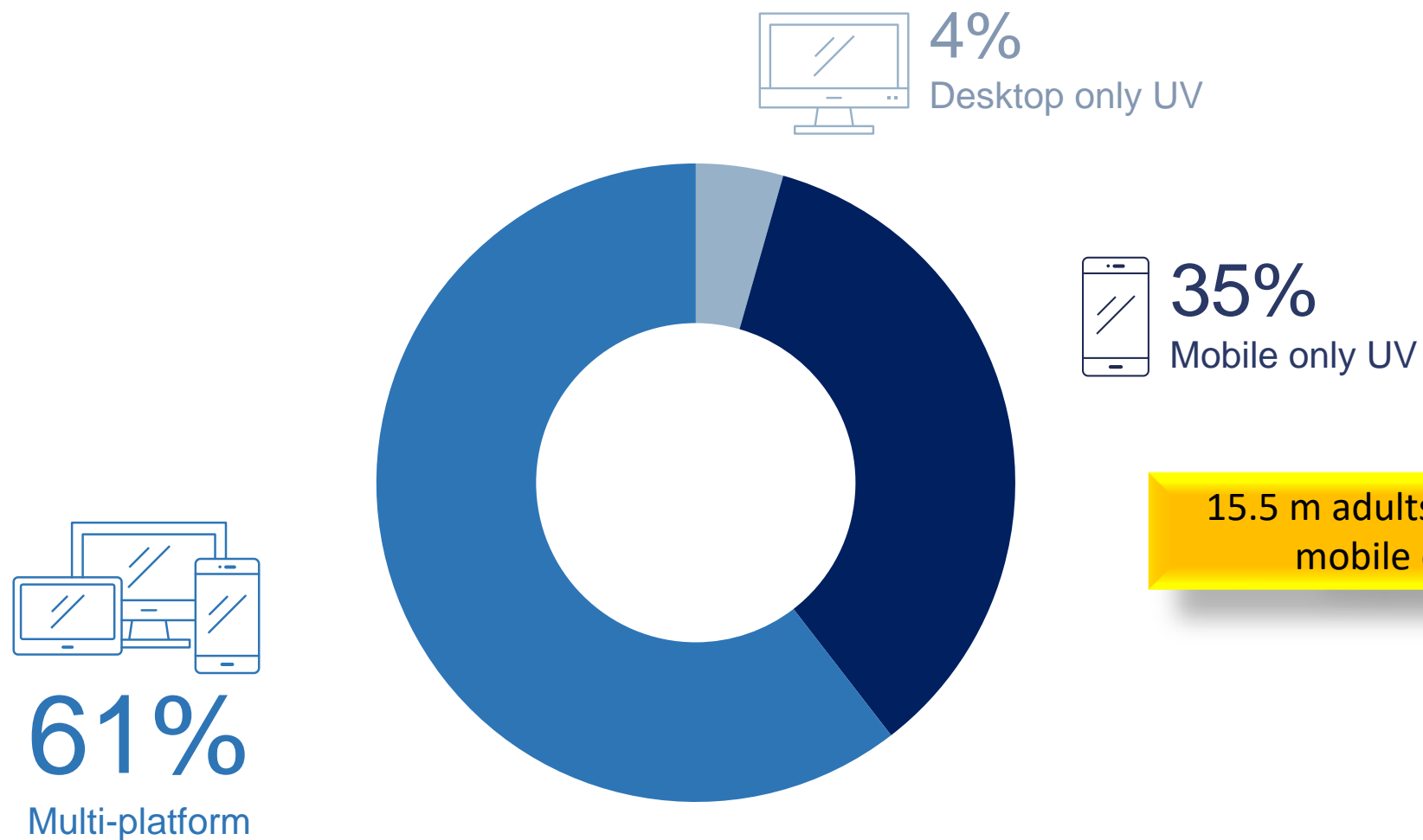




# Multi-Platform Usage

# Multi-Platform Usage

## Over a third of UK Adults are now Mobile Only



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



**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

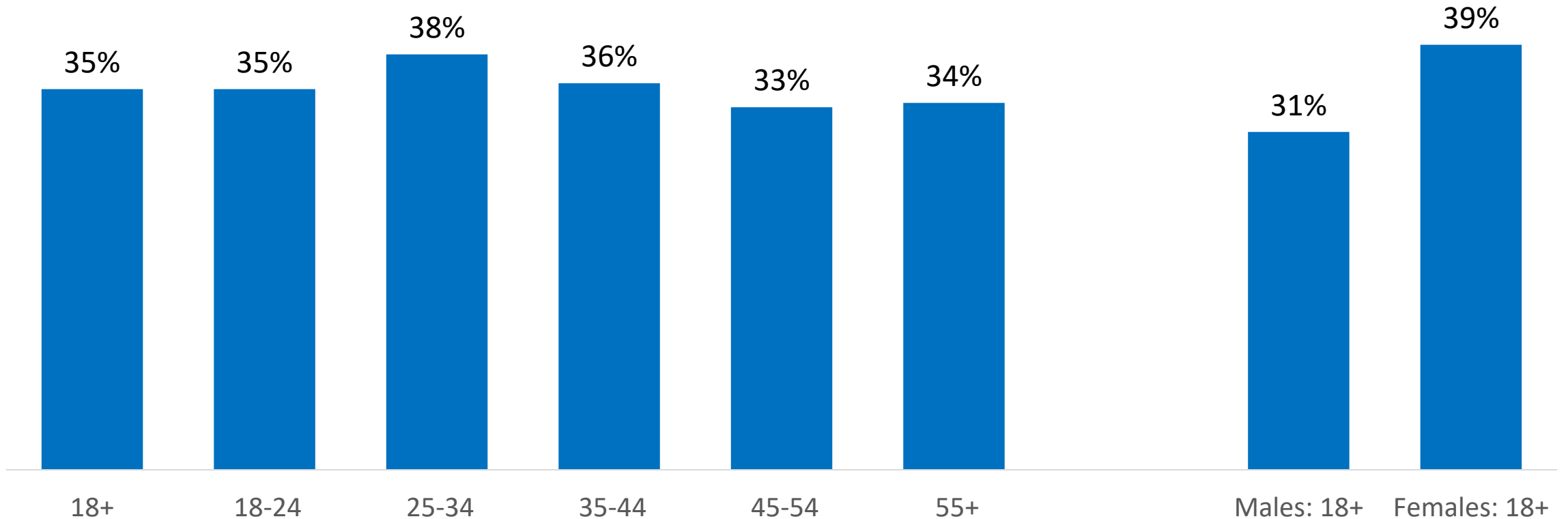
**JKOM**

Setting the industry standard for online audience measurement

# 'Mobile Only' Audience Reach by Age & Gender

## Females are more likely to be 'mobile only' than males

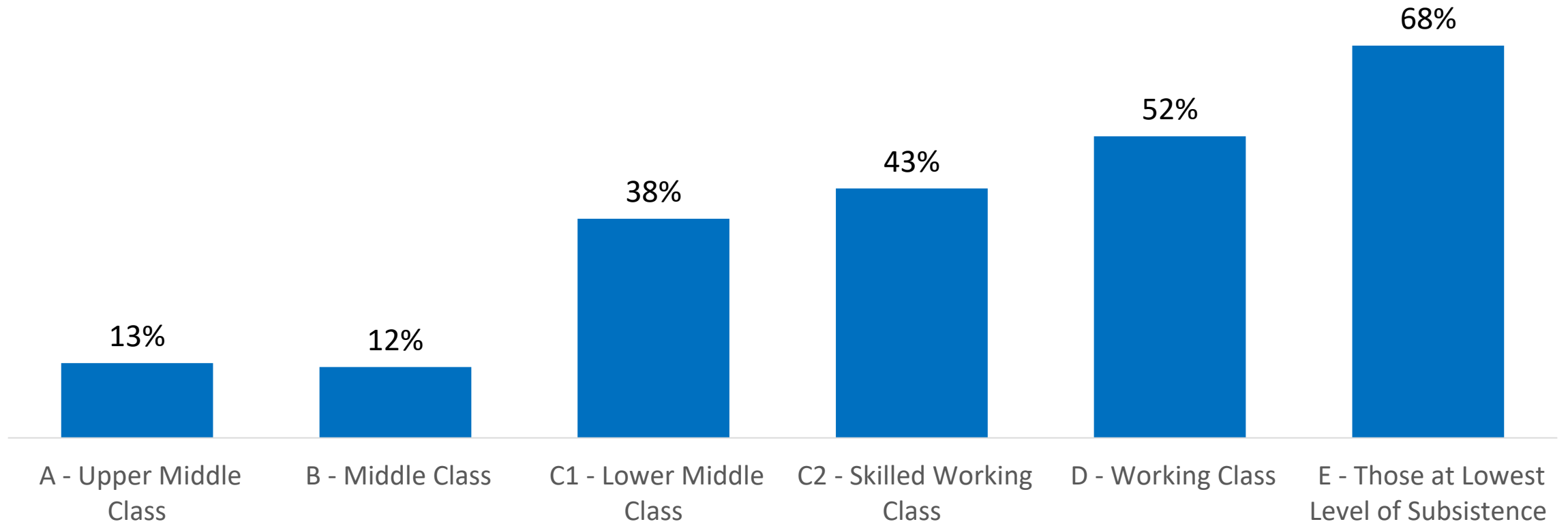
Mobile Only reach (%) by Age and Gender



# 'Mobile Only' Audience Reach by Social grade

## Lower social grades are more likely to be 'Mobile Only'

Mobile Only Reach (%) by Social Grade





# Top Properties: Total Digital Population

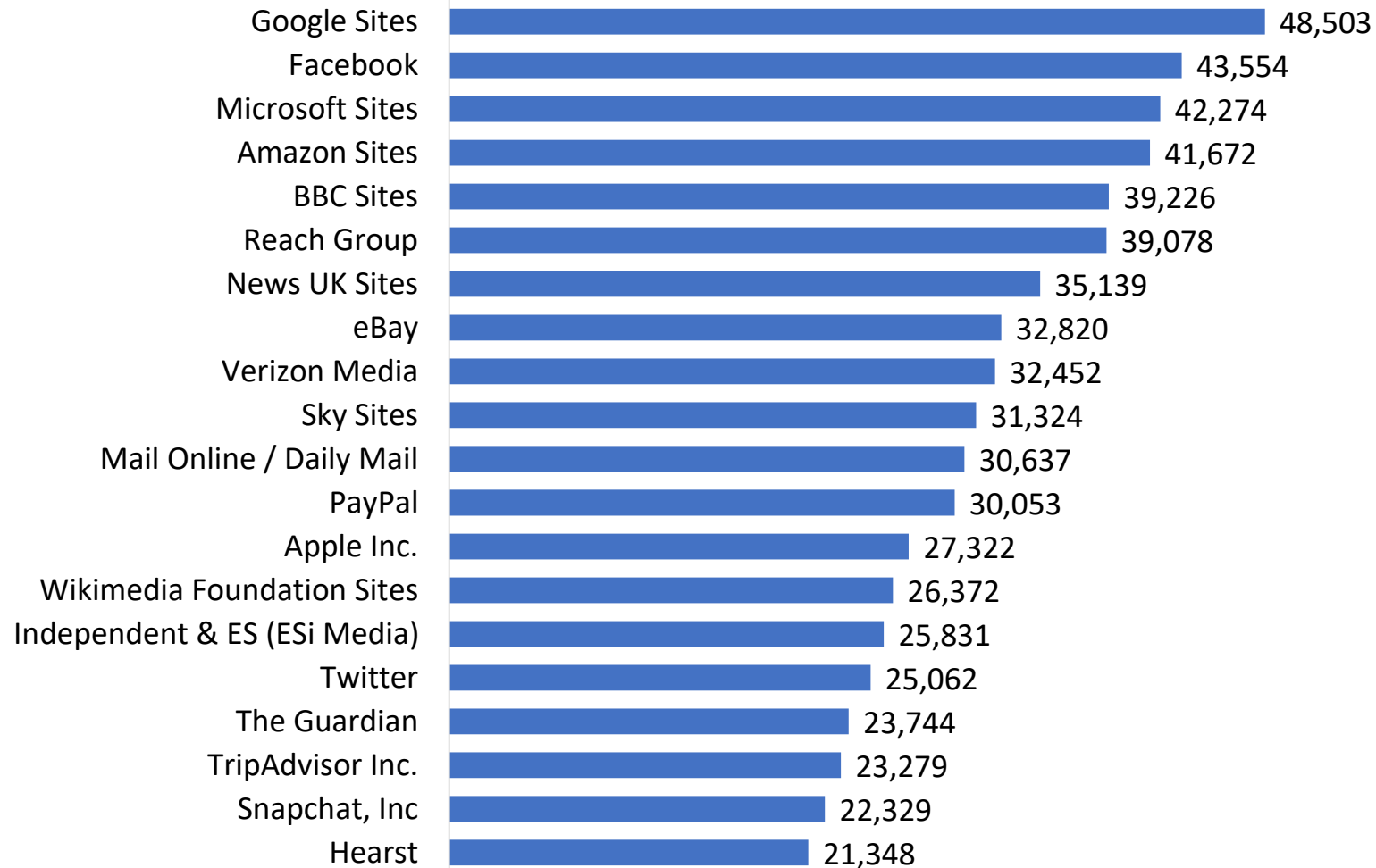


# Top 20 Properties by 'Unique Visitors' - Total Digital Population

## Google reaches 98% of the UK Online population



Total Unique Visitors/Viewers (000s) = 48,385



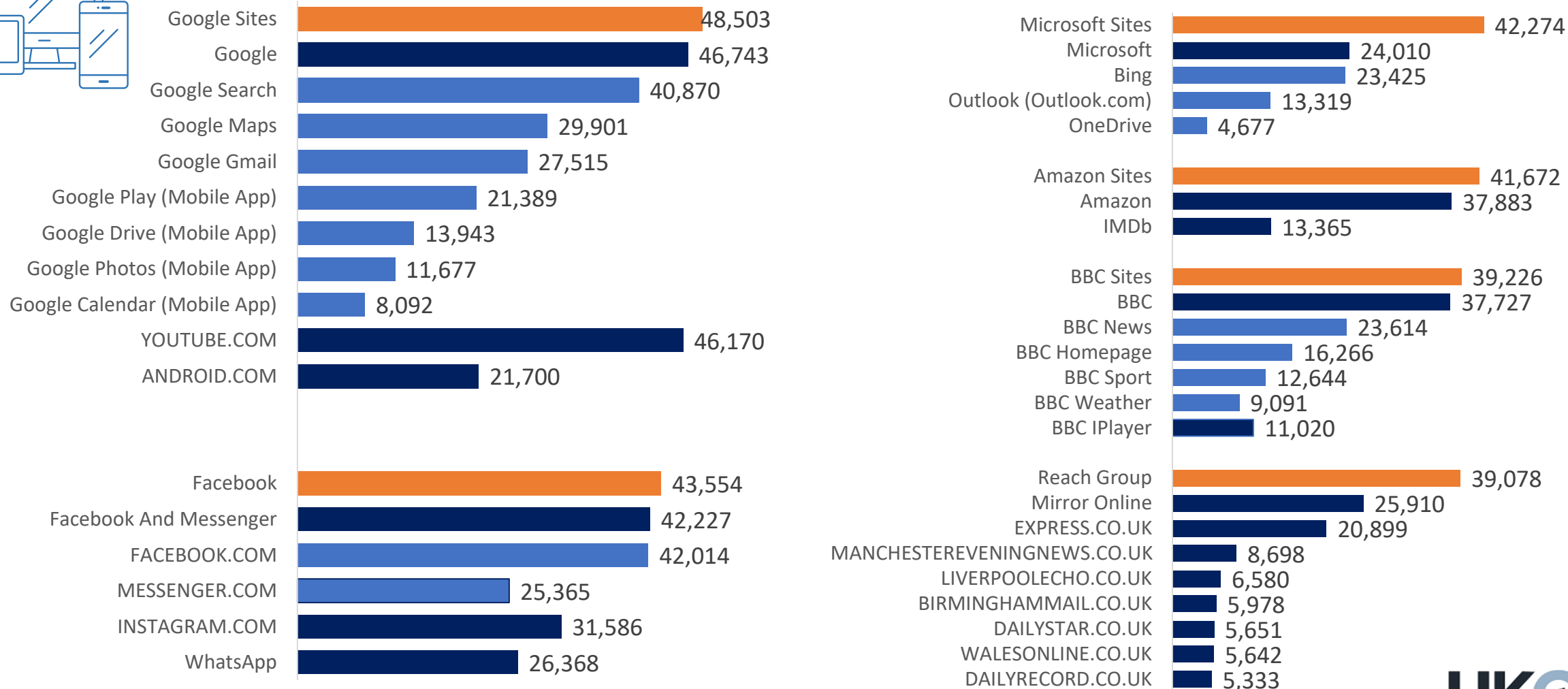
Google's properties now reach 98.3% of the UK population

# Audience Breakdown of Top 6 Sites

## YouTube alone reaches more than all Facebook properties combined



Total Unique Visitors (000)

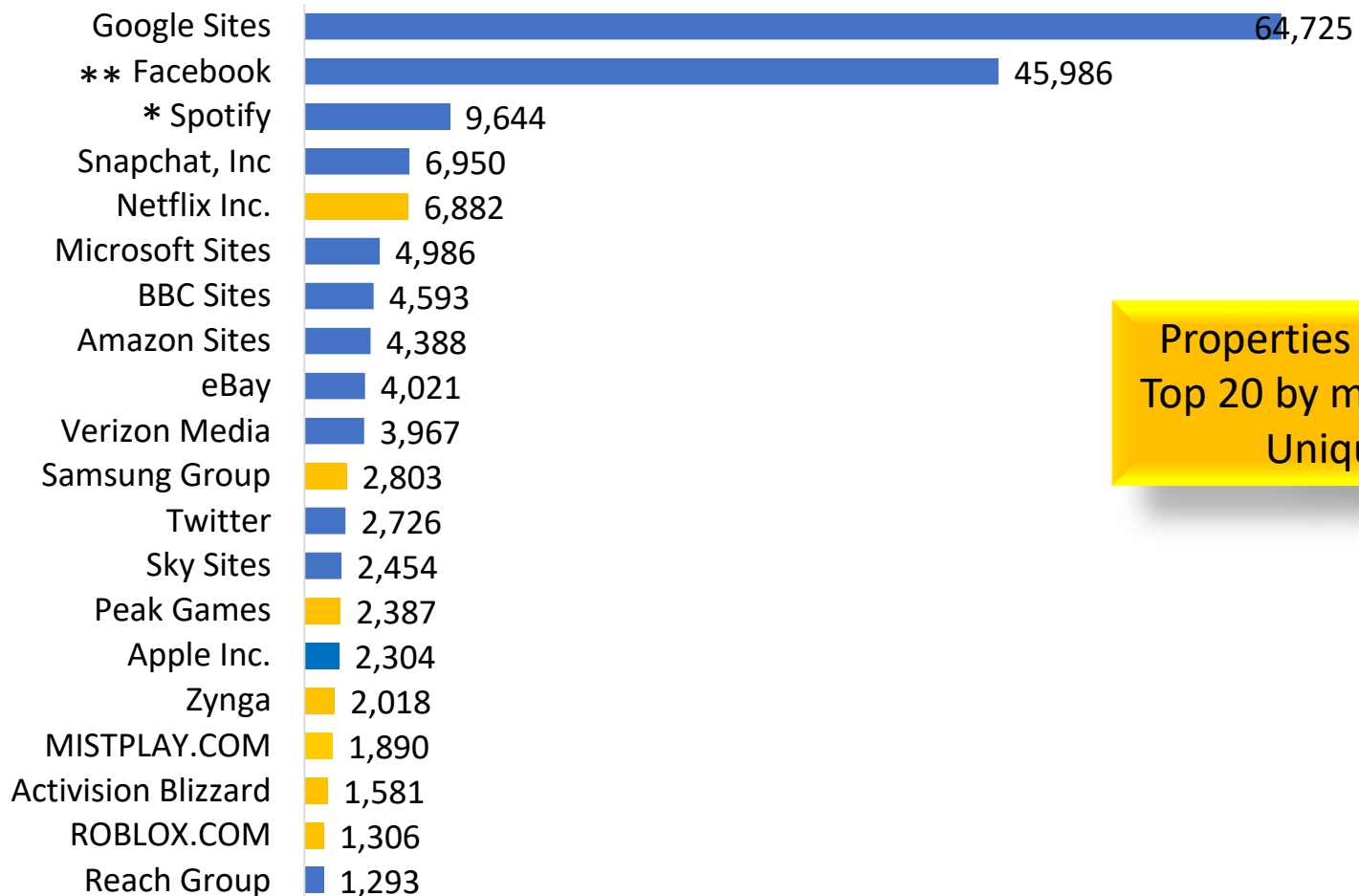


# Top 20 Properties by 'Time Spent' – Total Digital Population

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



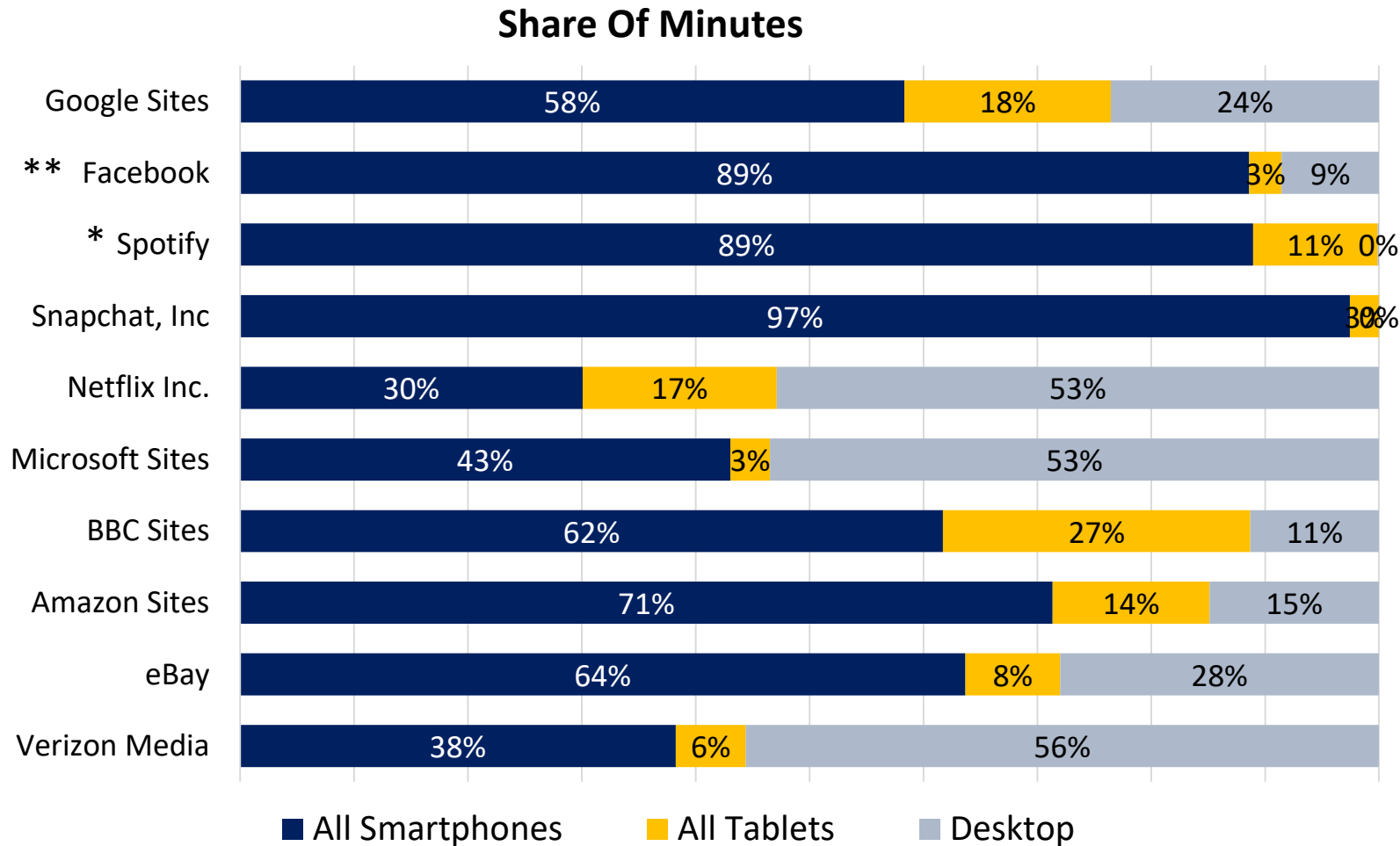
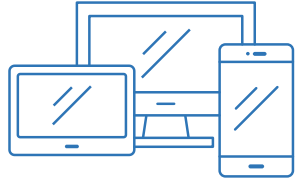
Total Mins (MM) – Total Market = 287,853



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

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

## Platform split is very different for the top 10



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

BBC, Google (Inc YT) and Amazon have highest Tablet share out of top 10

Majority of time spent online for Microsoft, Netflix and Verizon Media is on the desktop

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

\* Spotify duration was under-projected due to an app tagging issue that will be corrected in Q4 2019  
 \*\* Duration for Instagram and Facebook may be overstated, numbers may be revised after this report is published

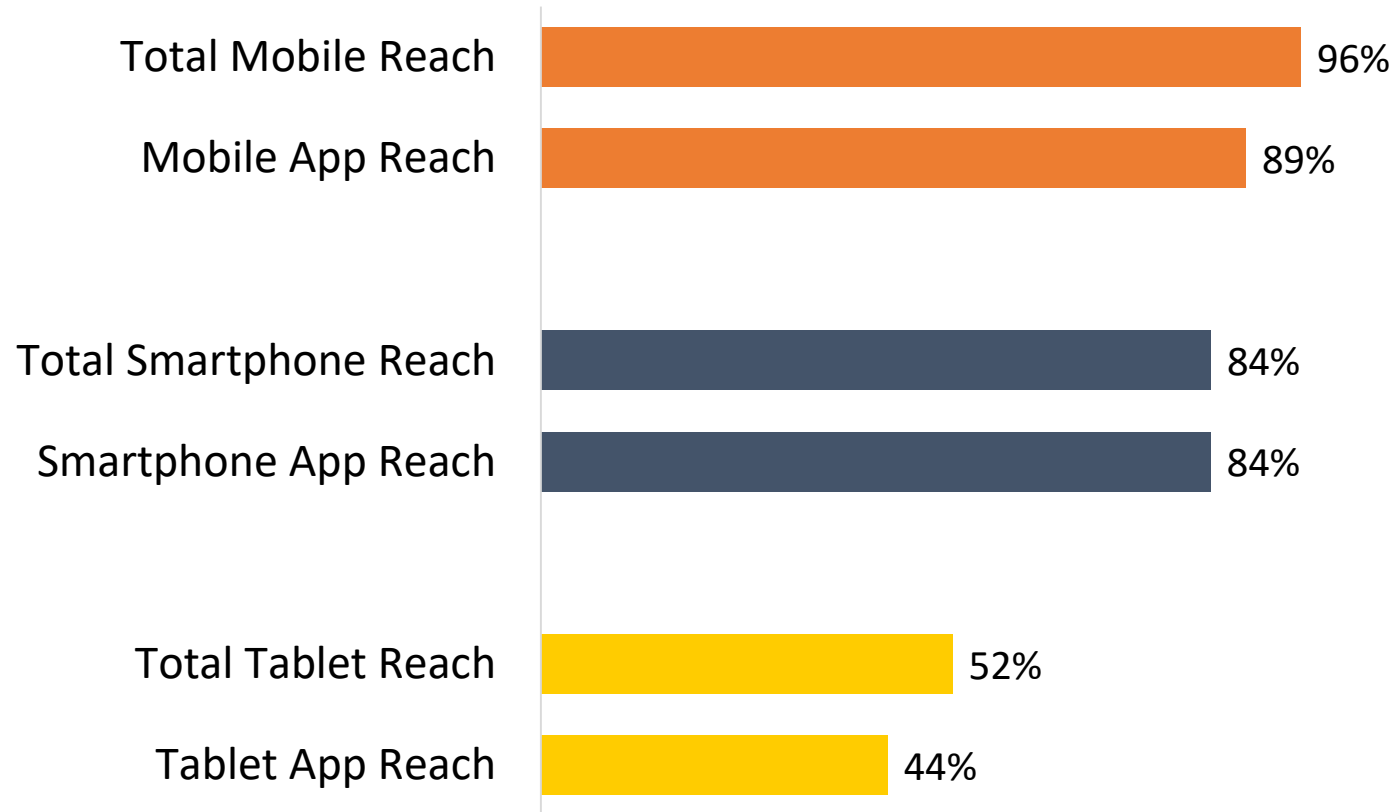


# Mobile usage

# Mobile Reach by Platform & Access

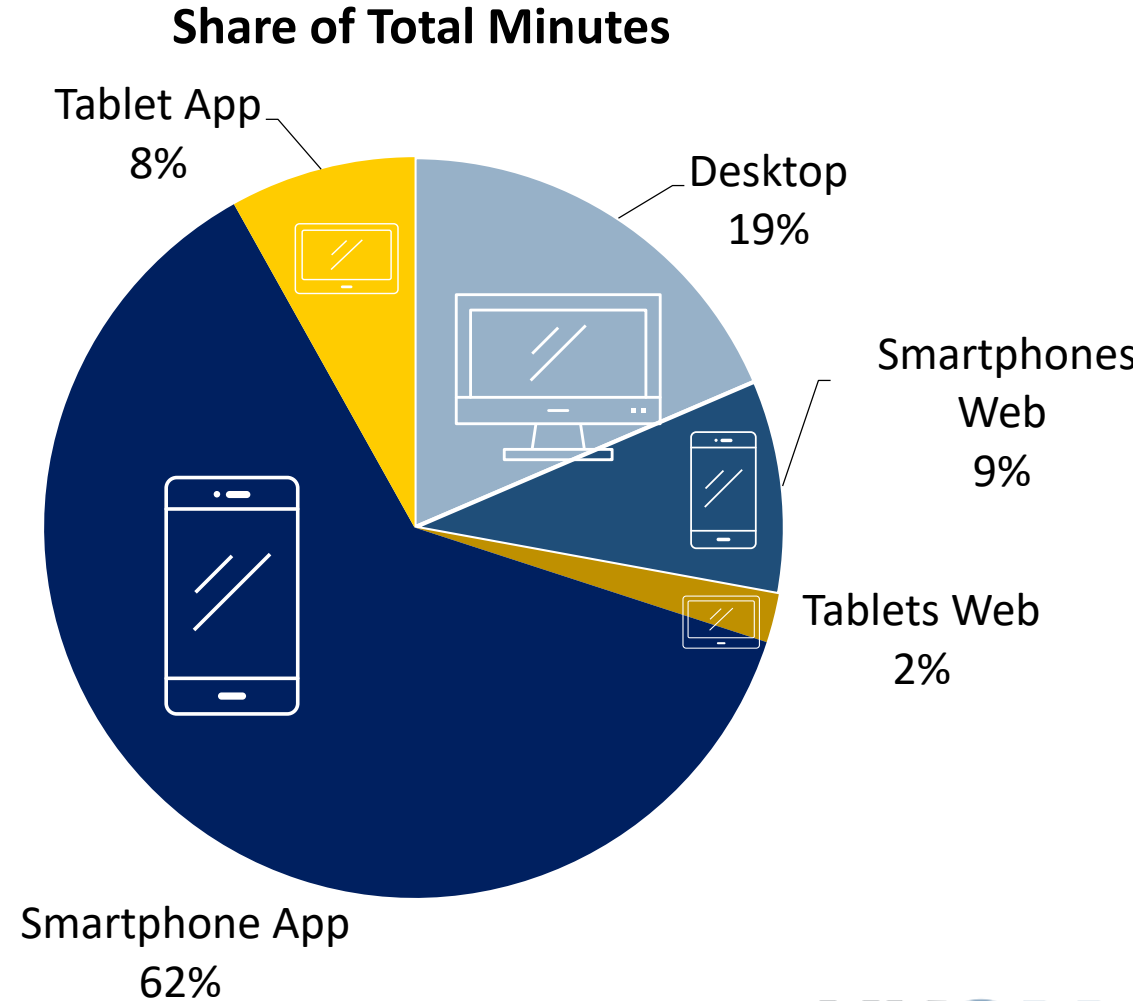
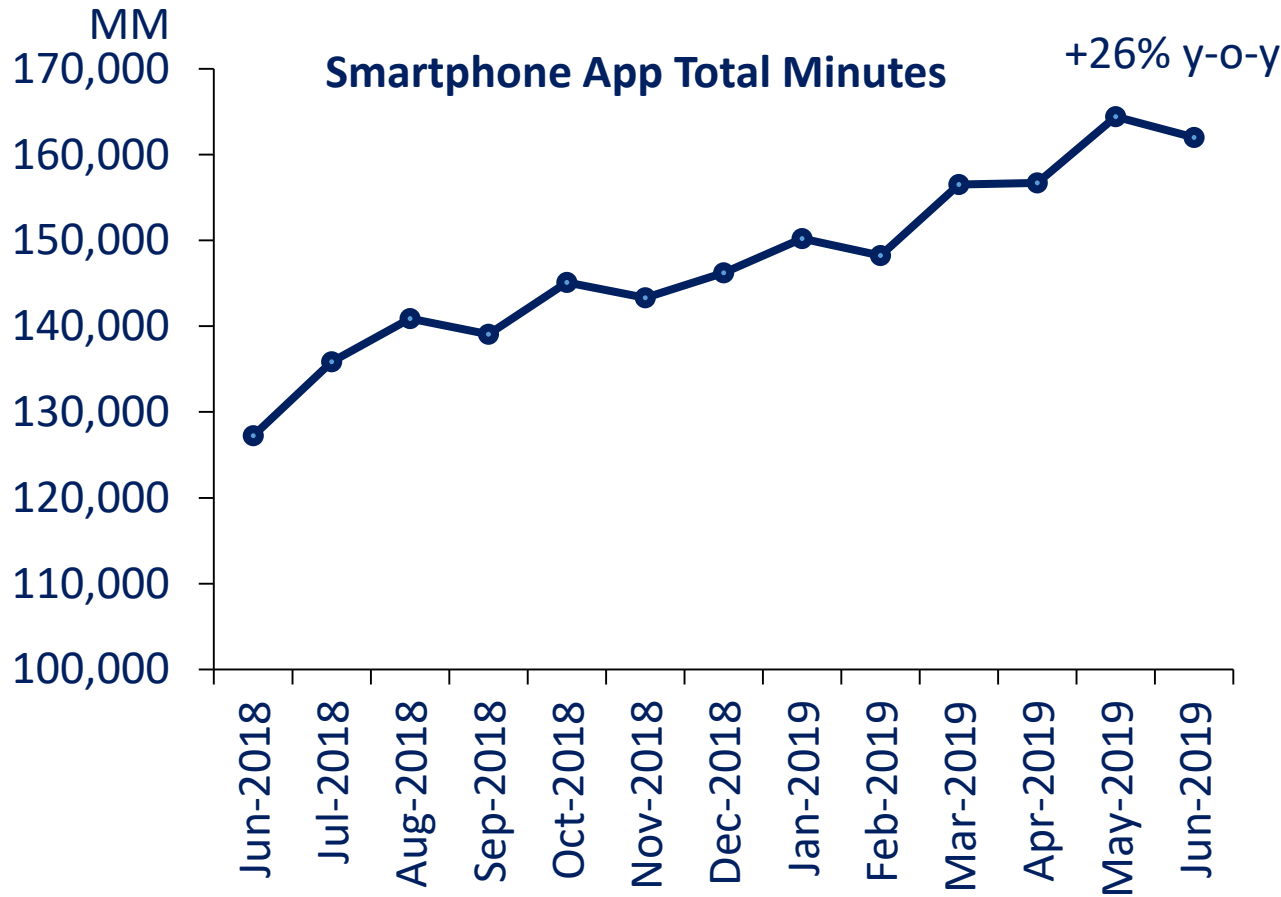
89% of the UK online adult population use mobile apps

Reach of Online UK Population - Sep 2019, 18+



# Minutes by Platform & Mobile Access

## Smartphone apps account for 59% of all Minutes



Source: Comscore MMX Multi-Platform, Age 18+, September 2019, UK  
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 Properties: Mobile Population

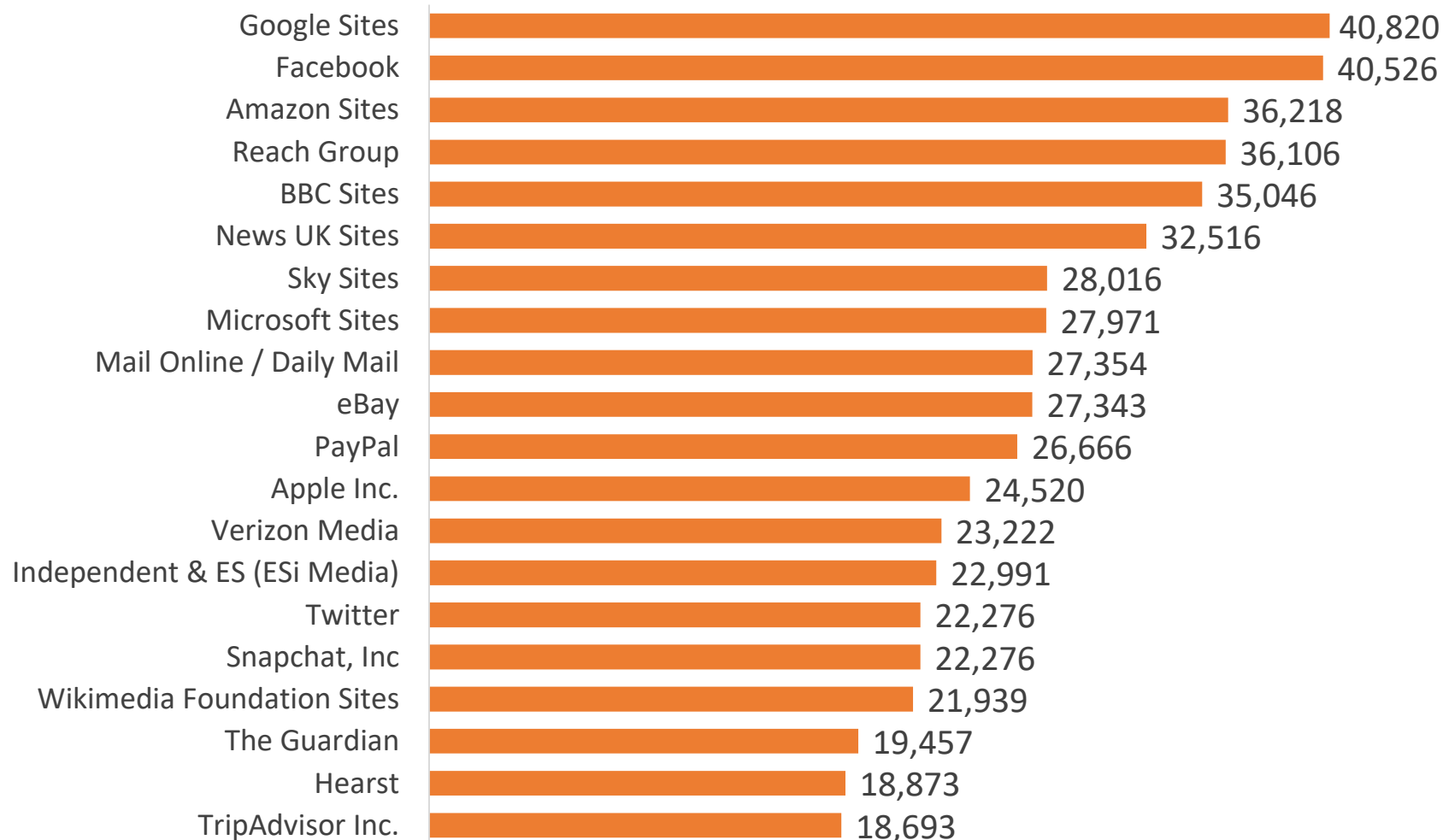


# Top 20 Mobile Properties ranked by Unique Visitors

42.1m adults accessed mobile content in Sep 2019 (via browser or app)



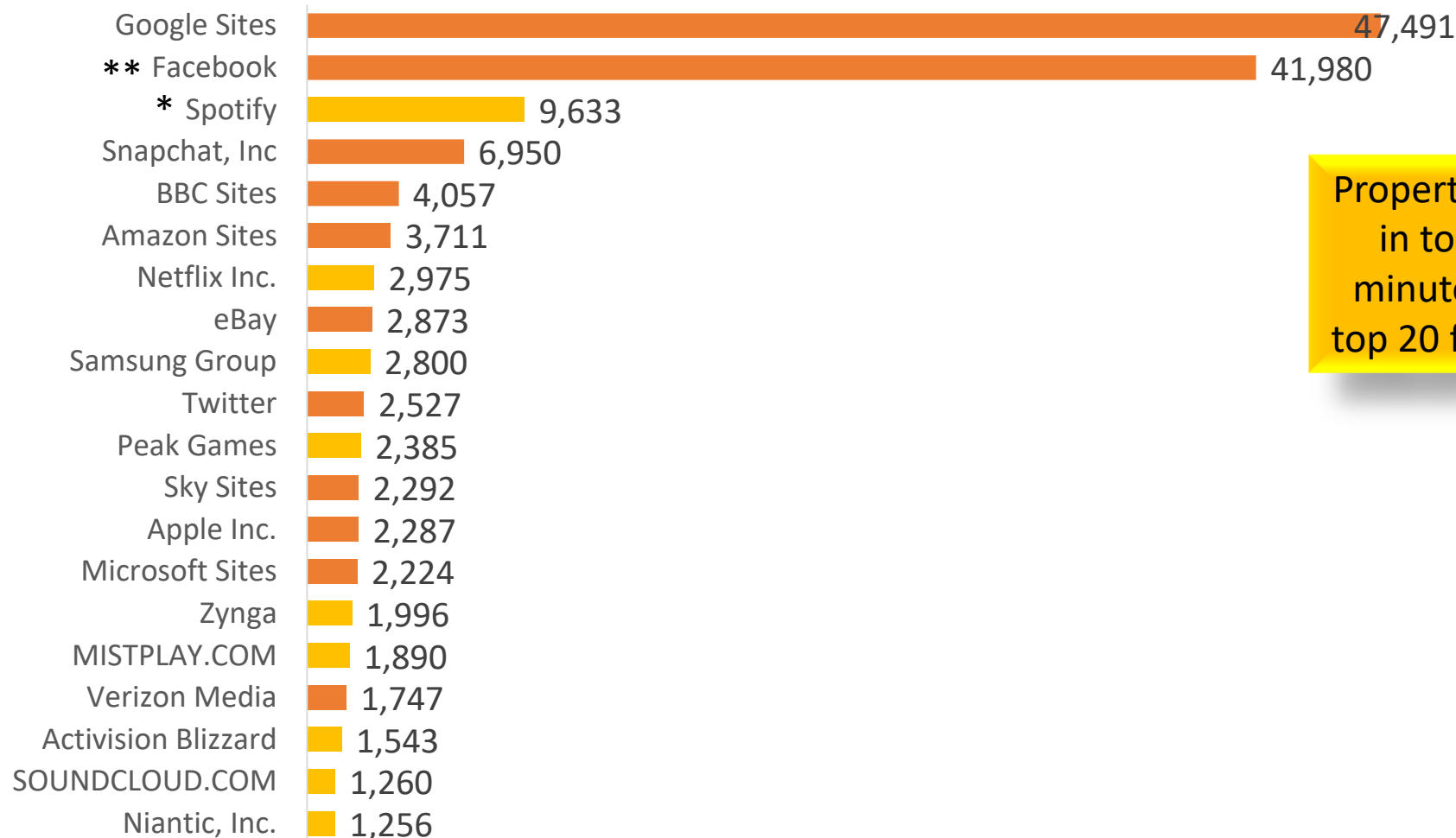
Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 42,127



# Top 20 Mobile Properties ranked by minutes

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

Total Minutes (MM) Total Mobile (18+) = 230,359



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

Source: Comscore Mobile Metrix, Age 18+. September 2019, UKPlease note that 'mobile' includes smartphone and tablet usage combined

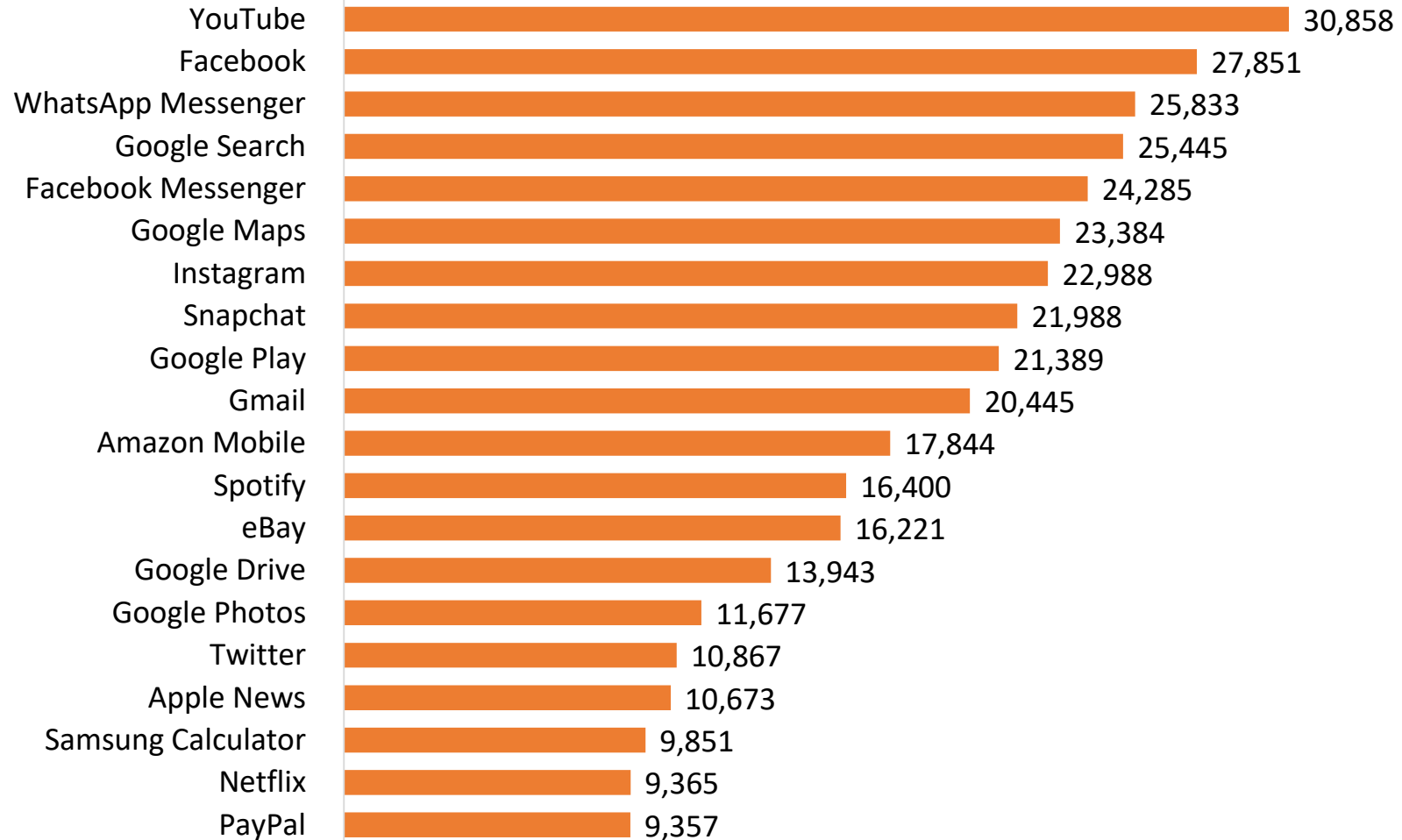
\* Spotify duration was under-projected due to an app tagging issue that will be corrected in Q4 2019  
\*\* Duration for Instagram and Facebook may be overstated, numbers may be revised after this report is published

# Top 20 Mobile Apps (Tablet & Smartphone) ranked by Unique Visitors

## Global Brands dominate top 20 Apps



Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 39.1m

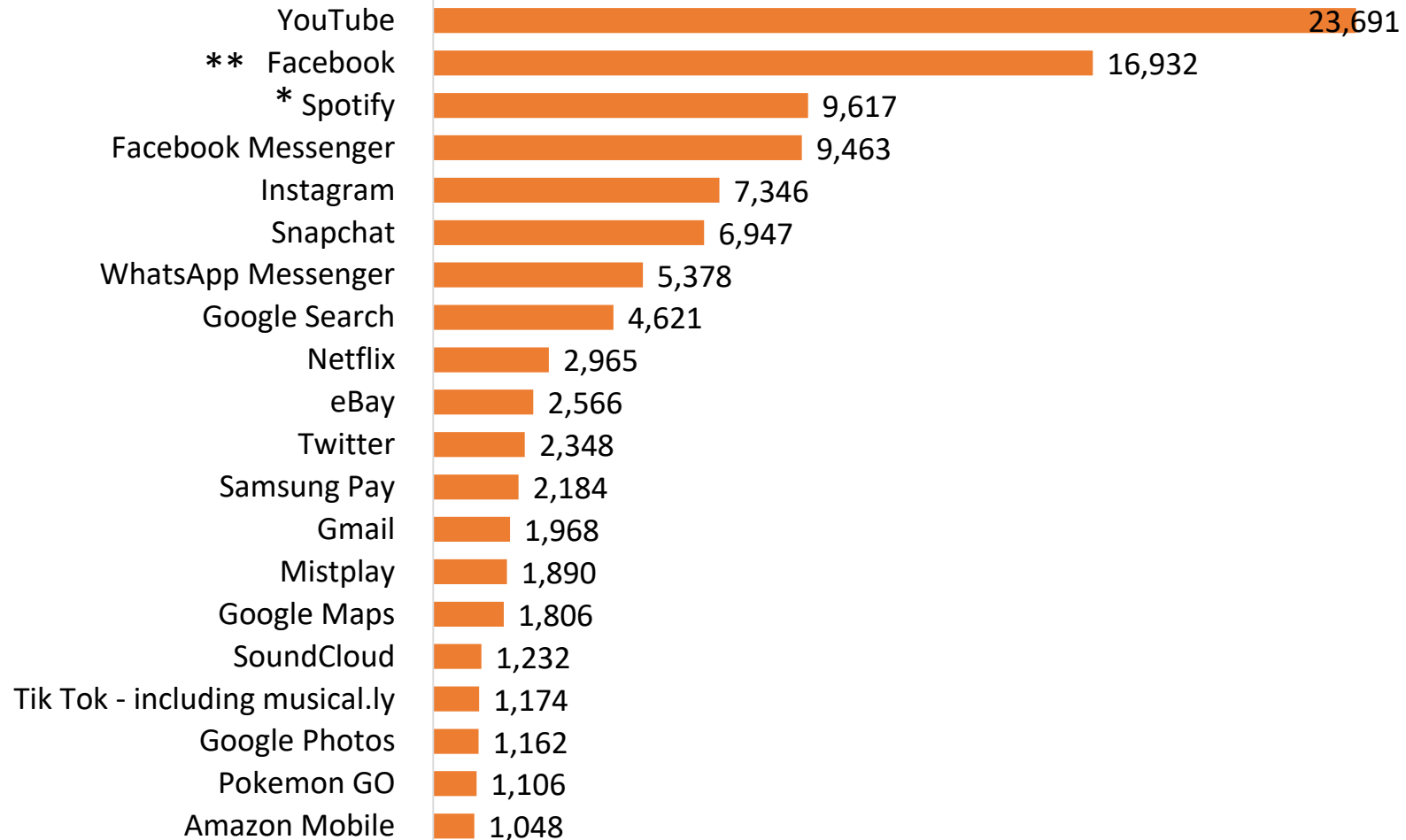


# Top 20 Mobile (Tablet & Smartphone) Apps ranked by Minutes

## Spotify & Netflix are in the top 10 for minutes spent on apps



Total Mins (MM) – Total Market = 197,947



Source: Comscore Mobile Metrix, Age 18+. September 2019, UK. Please note that 'mobile' includes smartphone and tablet usage combined

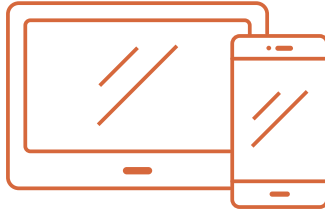
\* Spotify duration was under-projected due to an app tagging issue that will be corrected in Q4 2019

\*\* Duration for Instagram and Facebook may be overstated, numbers may be revised after this report is published

# Top 10 Mobile Apps by Unique Visitors split by Platform

## 9 of the top 10 apps are owned by Google or Facebook

### Total Mobile Top 10



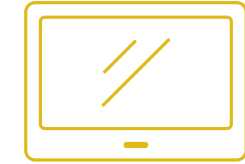
	(Million)
YouTube	30.9
Facebook	27.9
WhatsApp Messenger	25.8
Google Search	25.4
Facebook Messenger	24.3
Google Maps	23.4
Instagram	23.0
Snapchat	22.0
Google Play	21.4
Gmail	20.4

### Smartphone Top 10



	(Million)
• YouTube	27.2
• WhatsApp Messenger	25.7
• Facebook	25.5
• Google Search	23.8
• Facebook Messenger	23.0
• Google Maps	22.3
• Google Play	21.4
• Gmail	19.4
• Instagram	19.2
• Snapchat	17.3

### Tablet Top 10

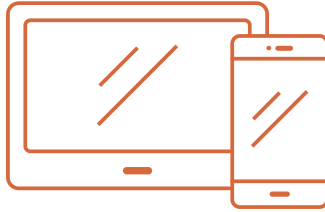


	(Million)
• Snapchat	6.5
• Instagram	6.1
• YouTube	5.7
• Facebook	3.5
• Netflix	2.3
• Google Search	2.3
• Spotify	2.2
• Apple News	2.1
• Amazon Mobile	1.8
• Facebook Messenger	1.8

# Top 10 Mobile Apps by Minutes by Mobile Platform

## Spotify, Netflix & eBay enter the top 10 for Minutes

### Total Mobile Top 10



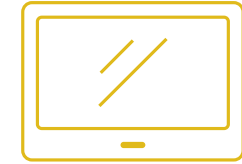
	(Billion)
YouTube	23.7
Facebook	16.9
* Spotify	9.6
Facebook Messenger	9.5
**Instagram	7.3
Snapchat	6.9
WhatsApp Messenger	5.4
Google Search	4.6
Netflix	3.0
eBay	2.6

### Smartphone Top 10



	(Billion)
• YouTube	16.1
• Facebook	15.6
• Facebook Messenger	15.1
• * Spotify	9.0
• **Instagram	6.8
• Snapchat	5.0
• WhatsApp Messenger	3.4
• Google Search	3.3
• eBay	2.0
• Samsung Pay	2.0

### Tablet Top 10



	(Billion)
• YouTube	6.9
• Google Search	1.1
• Netflix	1.1
• * Spotify	1.1
• Facebook	0.4
• BBC IPlayer	0.3
• ITV Hub	0.3
• YouTube Kids	0.3
• All 4	0.3
• eBay	0.3

Source: Comscore Mobile Metrix, Age 18+. September 2019, UK. Please note that 'mobile' includes smartphone and tablet usage combined

• Spotify duration was under-projected due to an app tagging issue that will be corrected in Q4 2019  
 \*\* Duration for Instagram may be overstated, numbers may be revised after this report is published



# Categories

# Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

19%

Computer Software	83%
Auctions	75%
Government	59%
Education	58%
Entertainment - Movies	56%
Gaming Information	53%
Media	53%
Humor	52%
Automotive	51%
Insurance	49%
Investments	48%
Home Furnishings	47%
Technology News	46%
Green	45%
Politics	45%



Smartphone total

71%

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



Tablet total

10%

Kids	26%
General News	22%
Entertainment	21%
Family & Youth	20%
Search/Navigation	15%
Real Estate	15%
Forums/Message Boards	13%
Online Gaming	13%
Games	13%
Books	13%
Local News	13%
Hotel/Resort/Home Sharing	12%
Travel - Information	12%
Politics	12%
Sports	11%

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

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

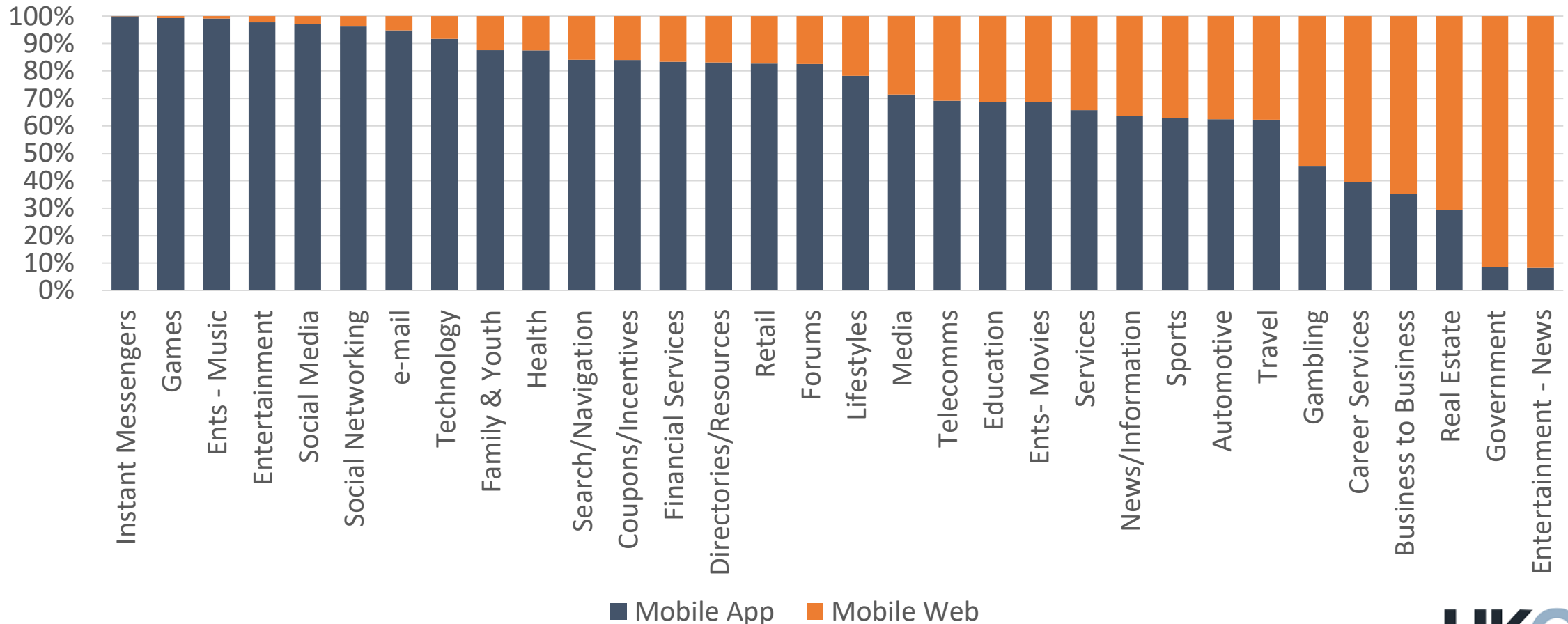


# Share of Mobile Minutes by Access Type by Category

## Mobile App share of minutes varies by content & service



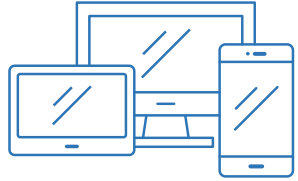
Mobile App v Mobile Web Share of Mobile Minutes



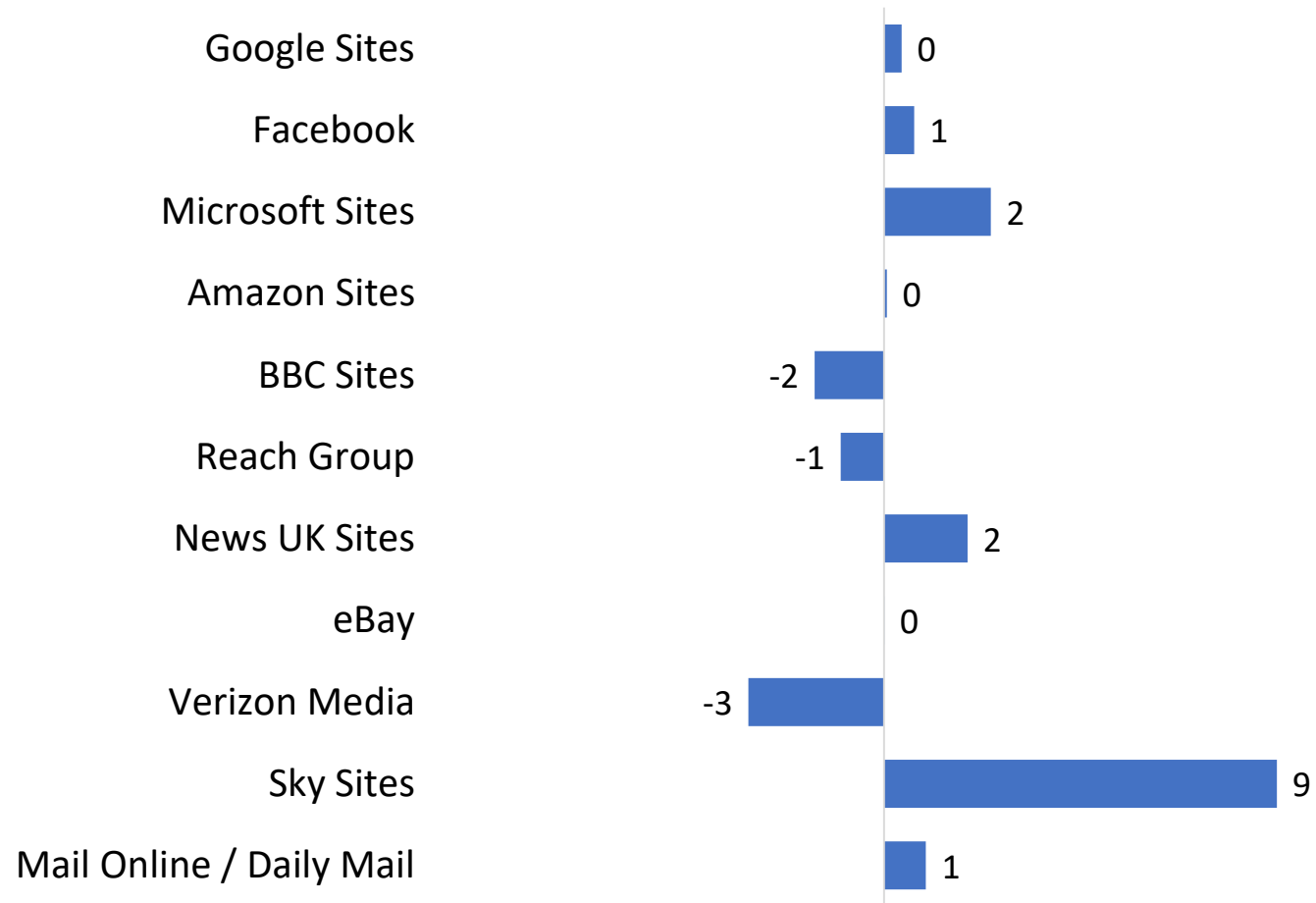


# Key Changes: Sep 19 v Jun 19

# % Change for Top Unique Visitor Properties: Sep 19 v Jun 19



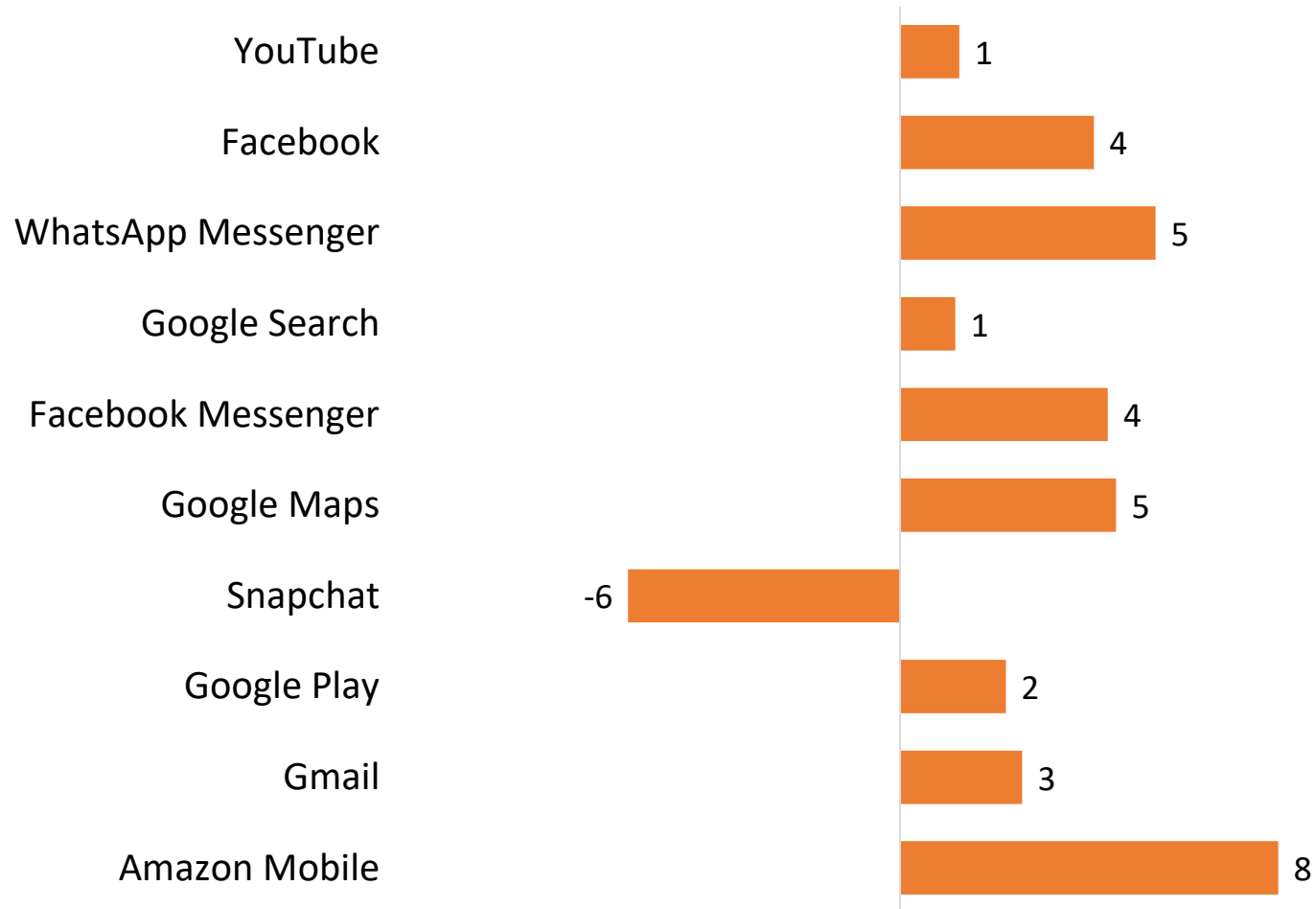
**Top 10 Unique Visitor Properties: UV % Change**



# % Change for Top Unique Visitor Mobile Apps: Sep 19 v Jun 19

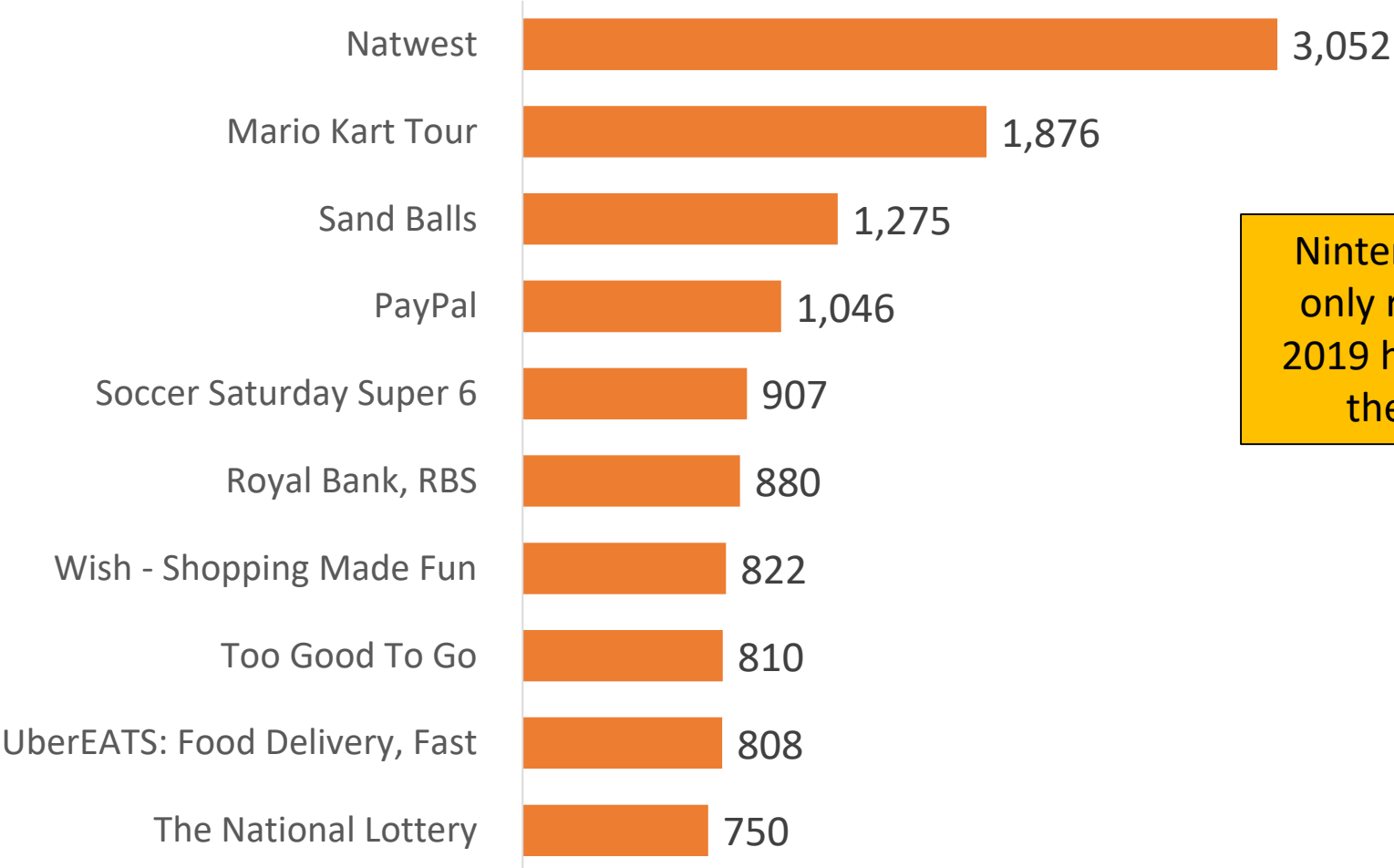


## Top 10 Unique Visitor Mobile Apps: UV % Change



# Mobile Apps outside the top 10 with high UV growth: Sep 2019 v Jun 2019

Additional 18+ Audience (000s) – Sep 2019 v Jun 2019



Nintendo's Mario Kart Tour, only released on 25th Sept 2019 had over 1.8m users by the end of the month

# Questions?

Find out more at: <http://www.ukom.uk.net/>  
Email us at: [insights@ukom.uk.net](mailto:insights@ukom.uk.net)

# 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 (NASDAQ: SCOR) is the trusted partner for planning, transacting and evaluating media across platforms. With a data footprint that combines digital, linear TV, over-the-top and theatrical viewership intelligence with advanced audience insights, Comscore allows media buyers and sellers to quantify their multiscreen behavior and make business decisions with confidence. A proven leader in measuring digital and set-top box audiences and advertising at scale, Comscore is the industry's emerging, third-party source for reliable and comprehensive cross-platform measurement. To learn more about Comscore, please visit [www.Comscore.com](http://www.Comscore.com)**

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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/](http://www.ukom.uk.net/)