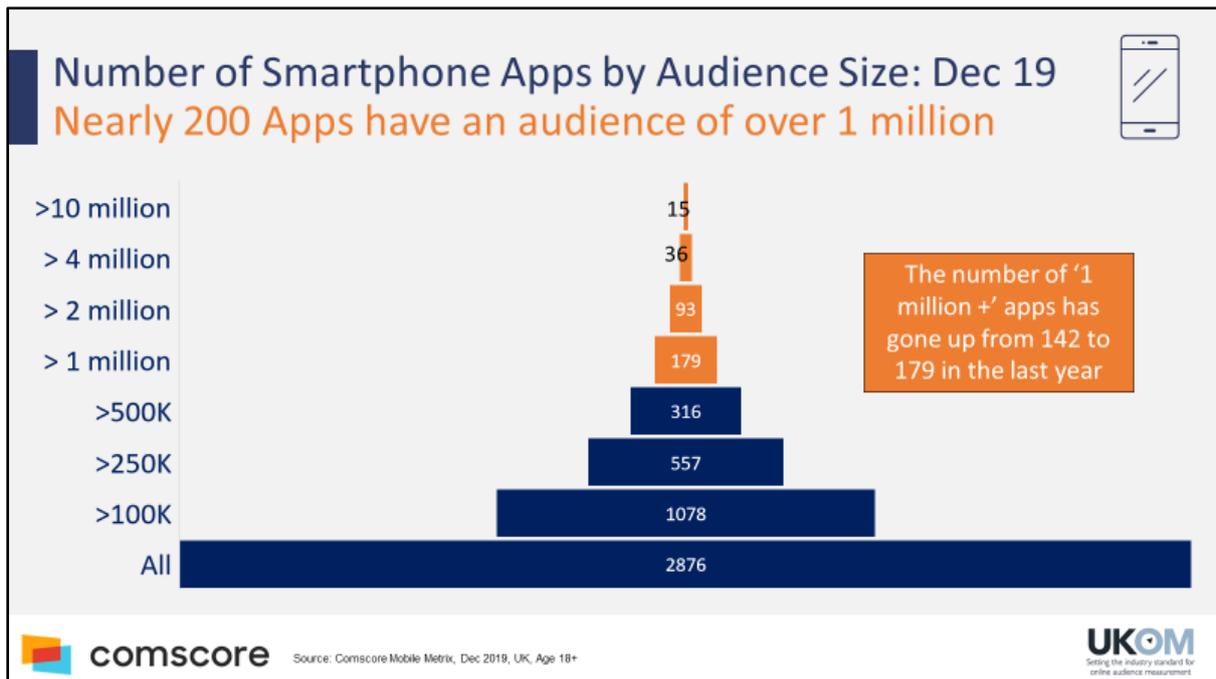


UKOM Insights

The 1 million+ club

In December 2019, Comscore reported usage data on 2,876 smartphone apps in the UK. Large US based global companies dominate the top 20 with Facebook and Google alone owning 9 of the top 10 based on unique visitors aged 18+. Only 6 apps are used by over half of all monthly adult smartphone users and the highest ranked UK App is BBC News at no. 26.

175 smartphone apps had more than 1 million adult visitors in December 2019, an increase of 33 compared to December 2018. Rather than focus on the usual suspects, this week, UKOM reports on a selection of apps which have witnessed large audience gains over the last 12 months and now sit in the '1 million+' audience category. UKOM's requirement for a measurement solution which is representative of the entire UK market enables identification of new and growing services and provides early insight of consumer trends or potential future competitors.



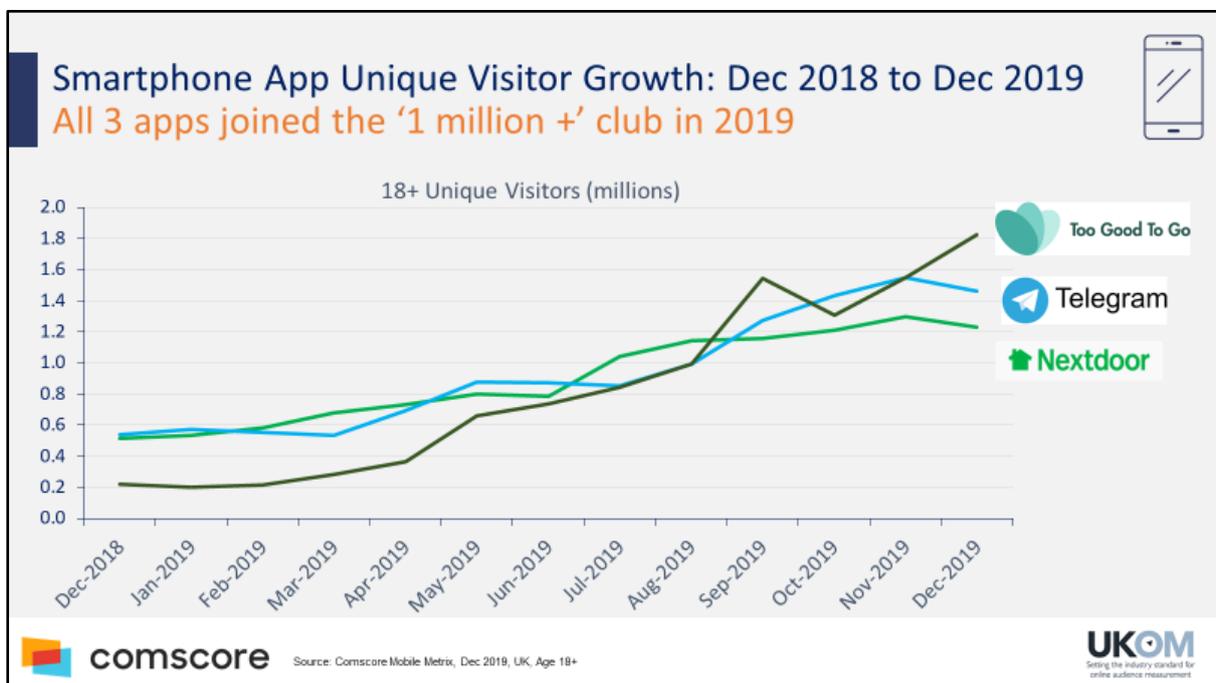
With so many apps it's hard for smaller companies to cut-through the clutter but some have been steadily growing over the year. One to watch which has performed well is 'Too Good to Go'. Too Good to Go, which launched in Denmark in 2015, has seen its audience grow from 0.2 million to 1.8 million in 2019 according to UKOM approved Comscore data. An app which reduces food waste and offers a discount is proving popular given the current focus on the environment making it one to watch in 2020.

Several other food apps including some of the global food brands have also experienced significant growth. Food delivery services **UBER Eats** (up by 2m to 3.1m) and **Deliveroo** (up by 0.6m to 1.3m),

have both seen their audience grow consistently. Uber Eats has grown fast and is now not far behind **Just Eat** which has 3.8 million unique visitors after adding 0.6 million in the last year. There is lots of activity in this sector so it will be interesting to see how the battle for users pans out in the coming year. Amazon's \$575m investment in Deliveroo is currently under investigation by the CMA, whilst Dutch firm takeaway.com are in the process of merging with Just Eat.

In the retail category, global high street food and drink chains **McDonalds** (up by 1m to 1.6m), **Burger King** (up by 0.6m to 1m) and **Costa Coffee** (up by 0.8m to 2.1m) also saw steady increases in their smartphone app user numbers with promotions or loyalty points often fuelling growth.

In the finance sector, two challenger banking apps broke the 1 million unique visitor barrier in 2019. **Monzo** increased its audience by 1.3 million and now has almost 2 million monthly visitors which is greater than the apps from traditional banks including Lloyds Bank, Capital One and RBS. **Starling Bank** and **Revolut** both doubled their audiences from around 0.5 million to just over 1 million. **Vanquis**, the credit card app also surpassed 1 million visitors for the first time in 2019.



In the social media category, **TikTok**, the social video app continues its upward trend surpassing 3 million monthly unique visitors in 2019 after adding 1.4 million – the app had 3.4 million UK smartphone users in December. Another social app which performed well in 2019 was **Nextdoor**, a social networking app which connects neighbours – unique visitors went up from 0.5 million to 1.2 million. **Reddit** also joined the '1 million +' gang in 2019, increasing its smartphone app audience from 0.9 million to 1.5 million monthly adults.

Finally, in 2019 WhatsApp firmly established itself as the leading Instant Messaging service by attracting over 3 million more users but another messenger service is starting to gain momentum in the UK. **Telegram**, an IM service where messages are heavily encrypted and can self-destruct, added almost 1 million new visitors in 2019, growing its audience from 0.5 million to 1.5 million UK adults.

With data on nearly 3000 apps each month, this analysis focuses on only a handful of those who have experienced growth in 2019. Comscore's MMX and Mobile Metrix provides more detail on all smartphone apps for subscribers but for quarterly top-line trends and data on top apps, more information can be found in UKOM's Digital Market Overview here.

Notes on Data:

All data is based on UKOM industry standard and development level approved Comscore MMX Mobile Metrix data based on Dec 2018 to Dec 2019. All analysis is undertaken on 18+ adults, Platform = All Smartphones, Media = All Applications.