

The Impact of COVID-19 on Online Usage

Julie Forey
29th April 2020

Time online

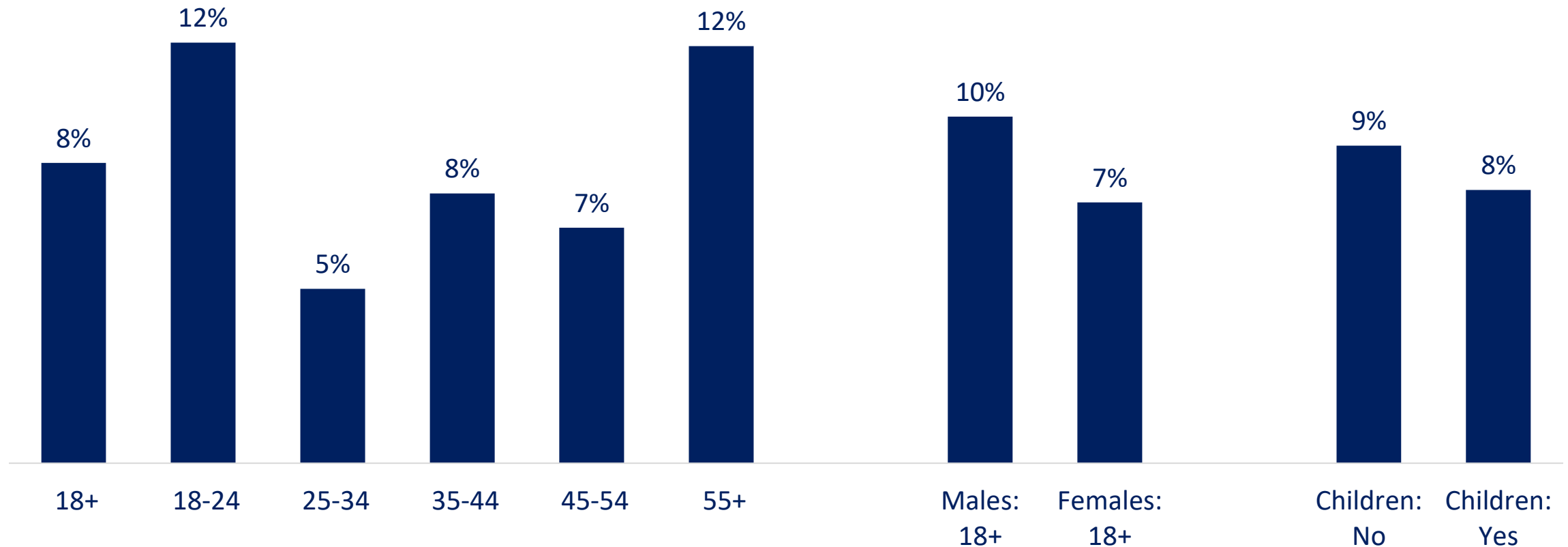
Key Changes: Jan-Mar 2020

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Time Online % Change by Demographics: Jan-Mar 2020

Total Minutes increased by 8% - higher among 18-24s and 55+

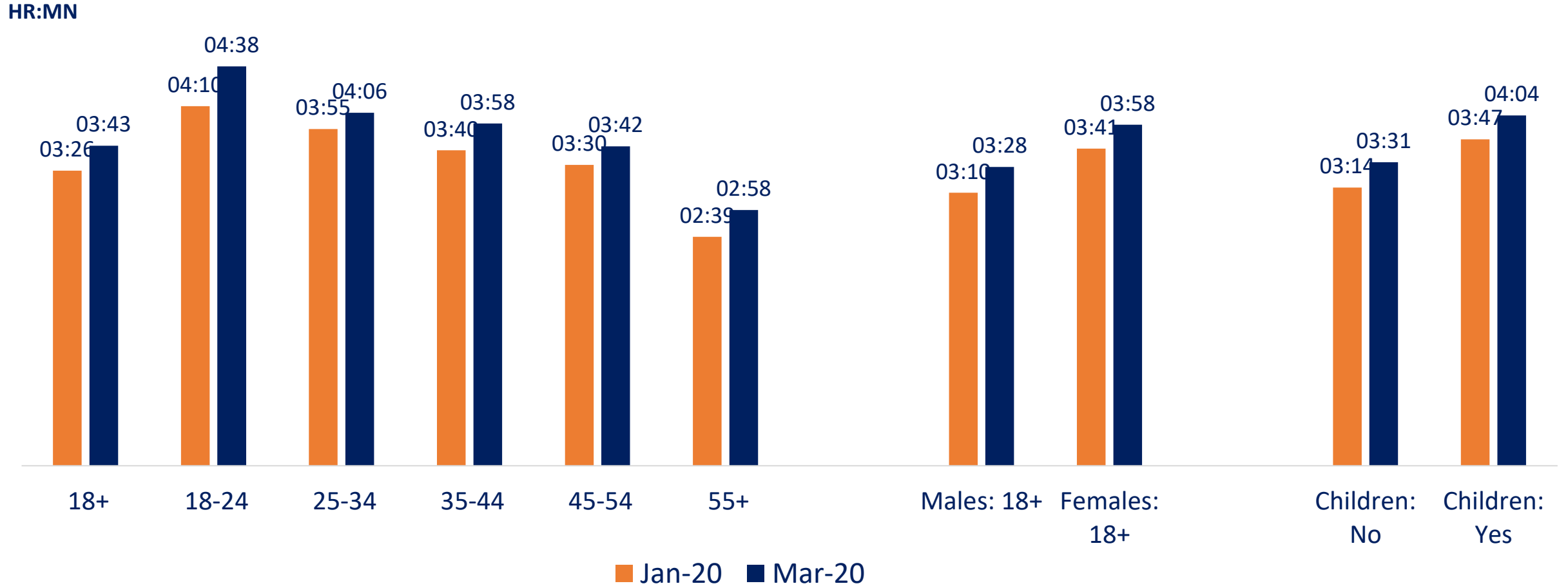


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Average Time Spent Online Per Day by Demos Jan-Mar 2020

18+ Average Time Online increased by 17 mins to 3hrs 43 mins.



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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



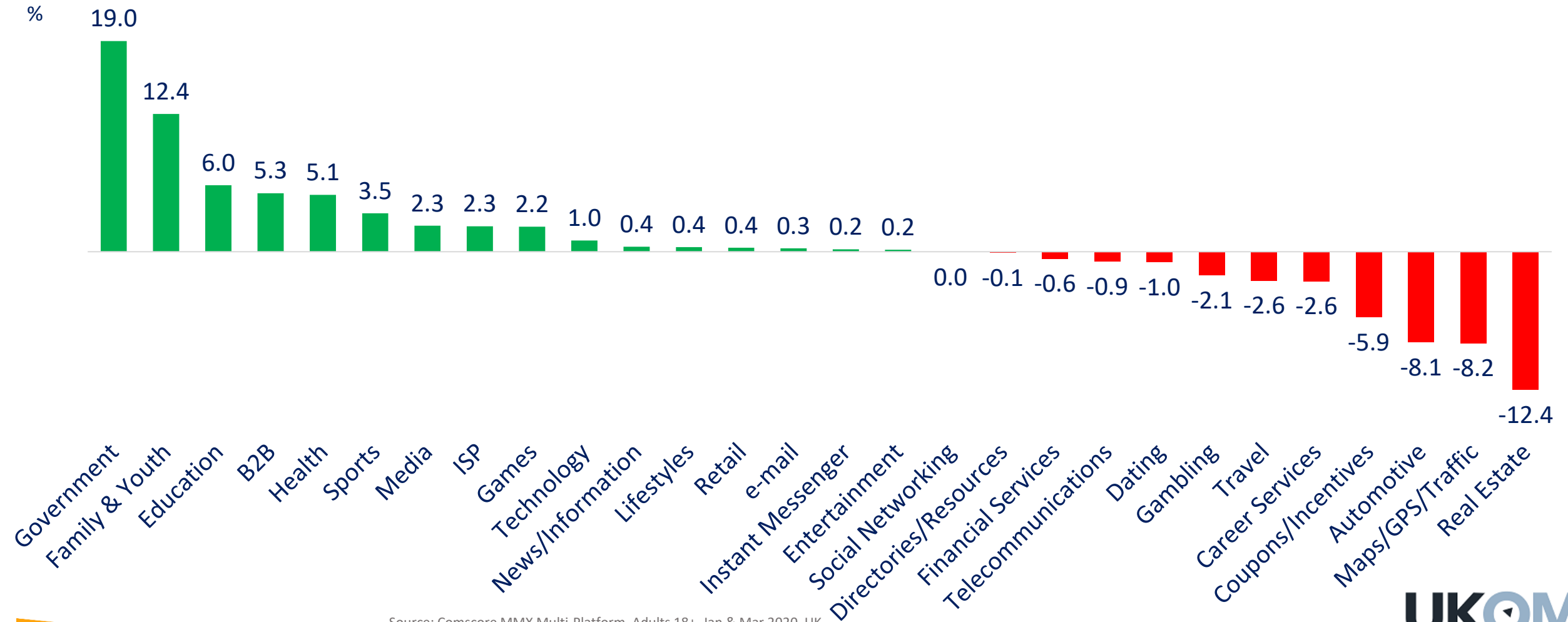
All Categories

Key Changes: Jan-Mar 2020



Major Category Unique Visitor Change: Jan-Mar 2020 (%)

Government, Education & Health all witnessed uplifts



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

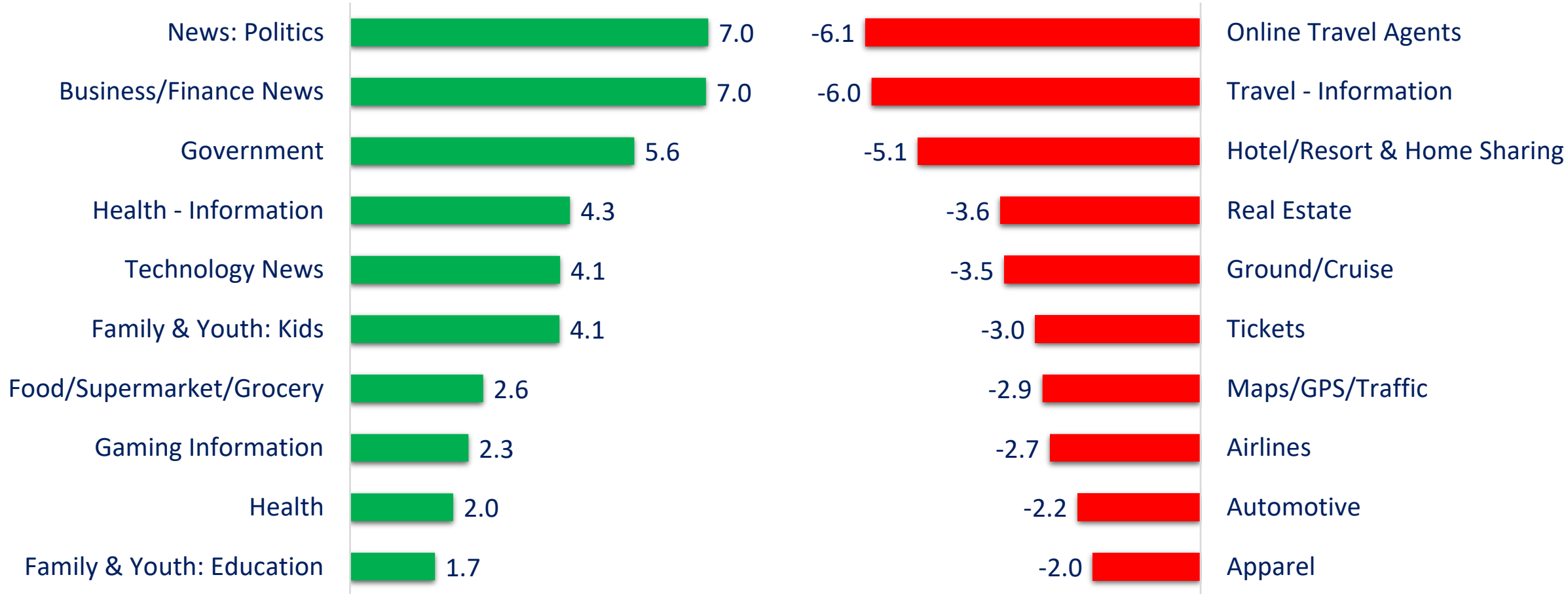
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Category Unique Visitor Change: Jan-Mar 2020 (Millions)

News Sub-Categories added most visitors

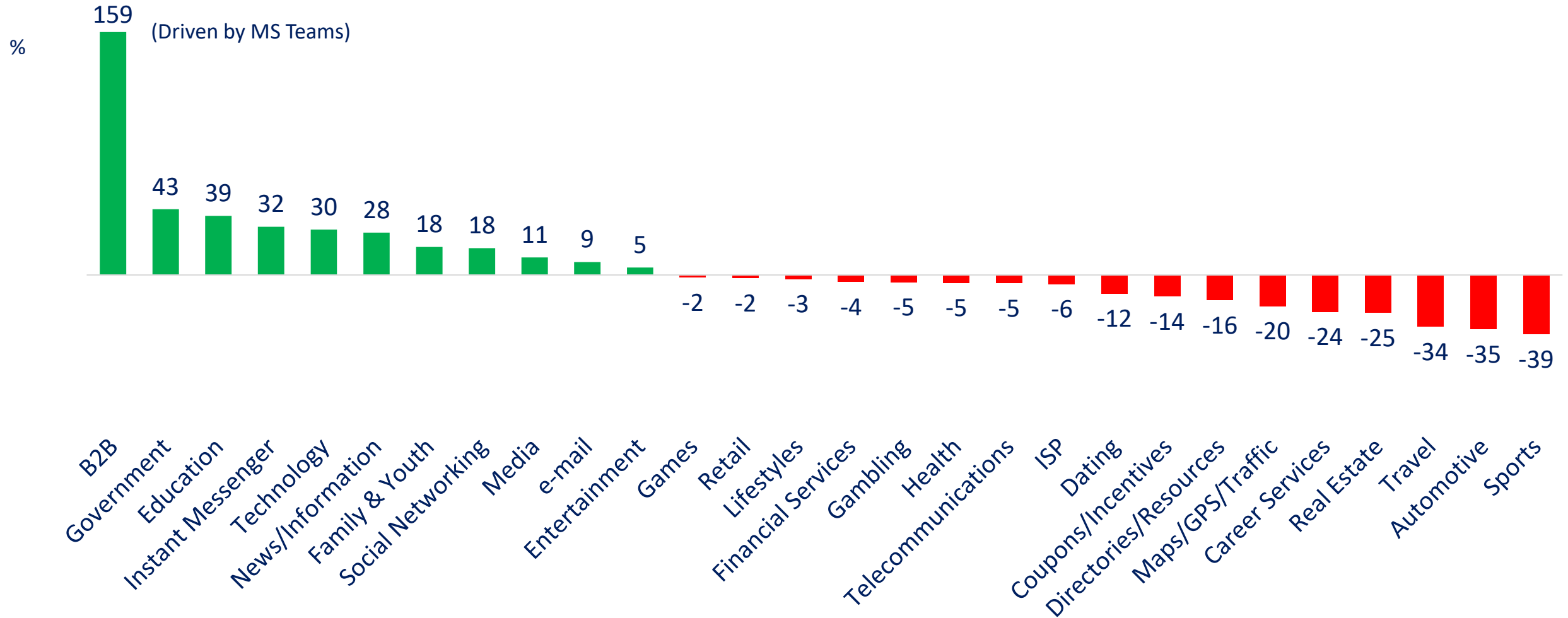
Unique Visitor Increase (Millions)

Unique Visitor Decrease (Millions)



Major Category Time Online Change: Jan-Mar 2020 (%)

Government & Education experienced biggest % uplifts



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

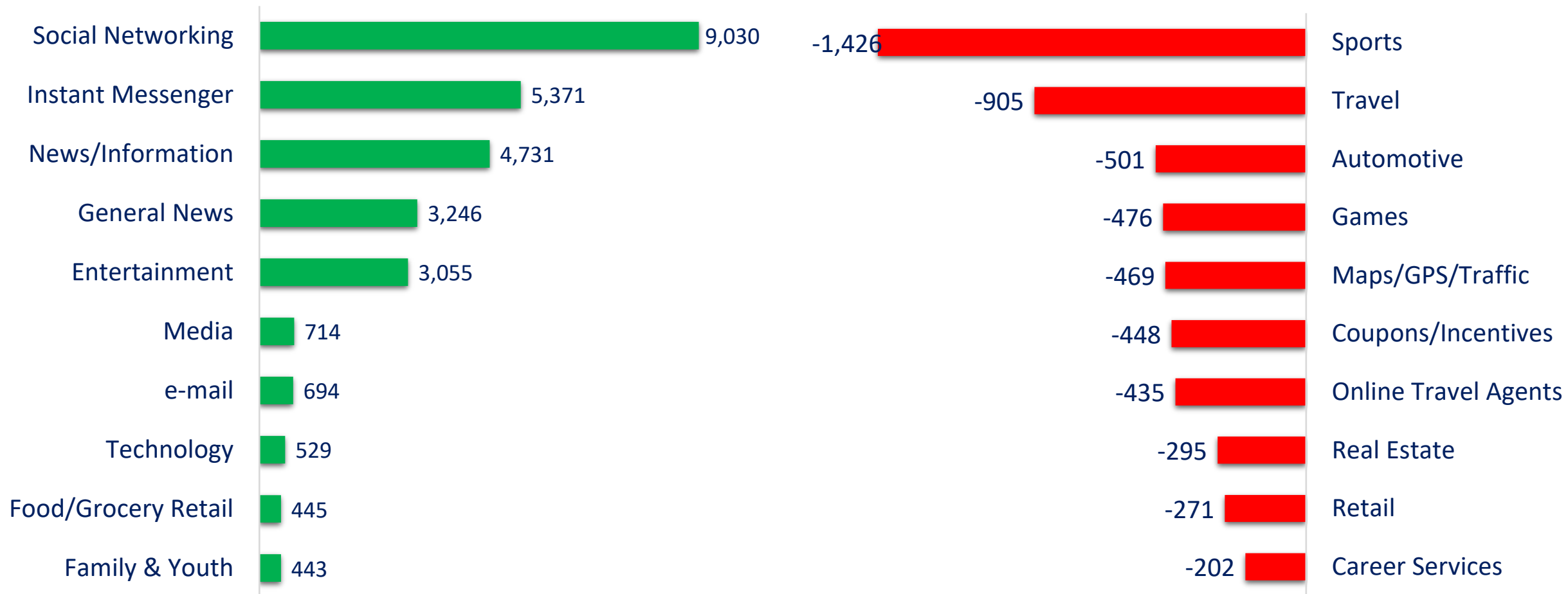
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Category Time Online Change: Jan-Mar 2020

Social Networking, News and IM added most minutes

Total Minutes Increase (Millions)

Total Minutes Decrease (Millions)



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Growth Categories



Retail: Food/Grocery

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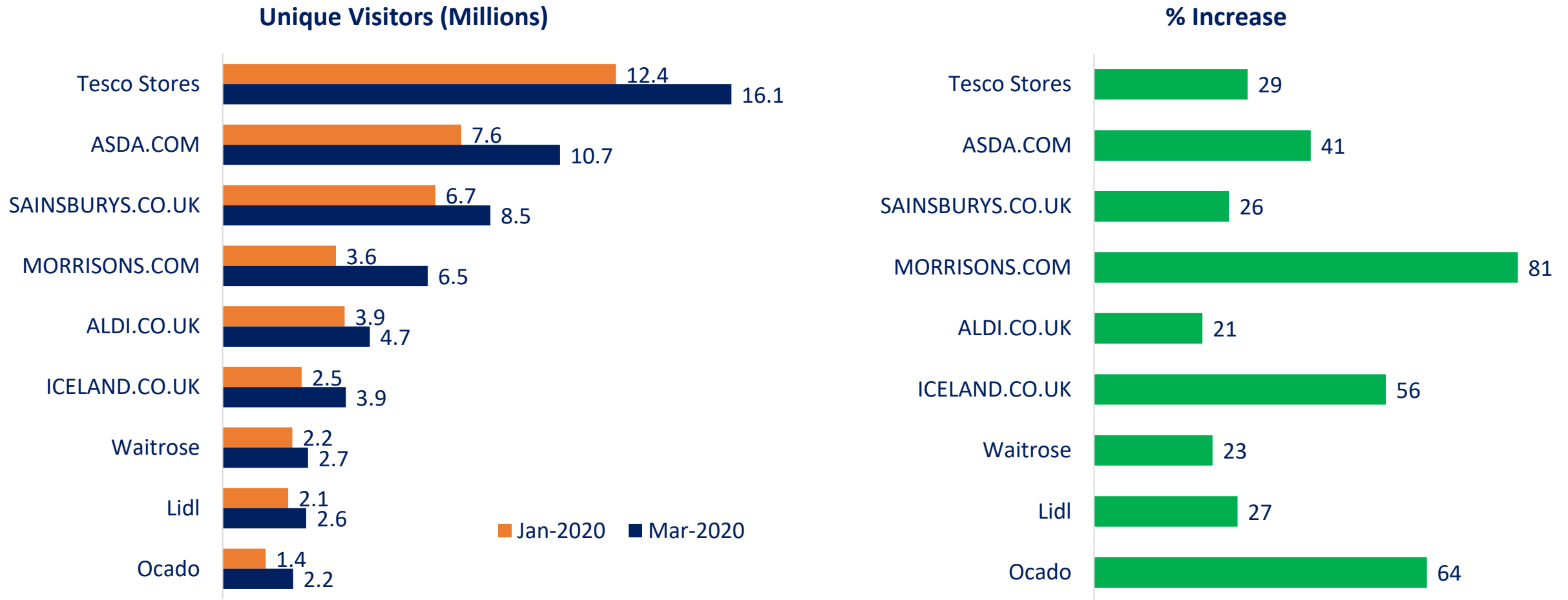
Key Changes: Jan-Mar 2020

- Unique Visitors +9%
- Unique Visitors +2.6m
- Visits +49%
- Minutes +48%



Grocery Retailers*: Unique Visitor Change Jan-Mar 2020

All Main Grocery Brands experienced uplifts

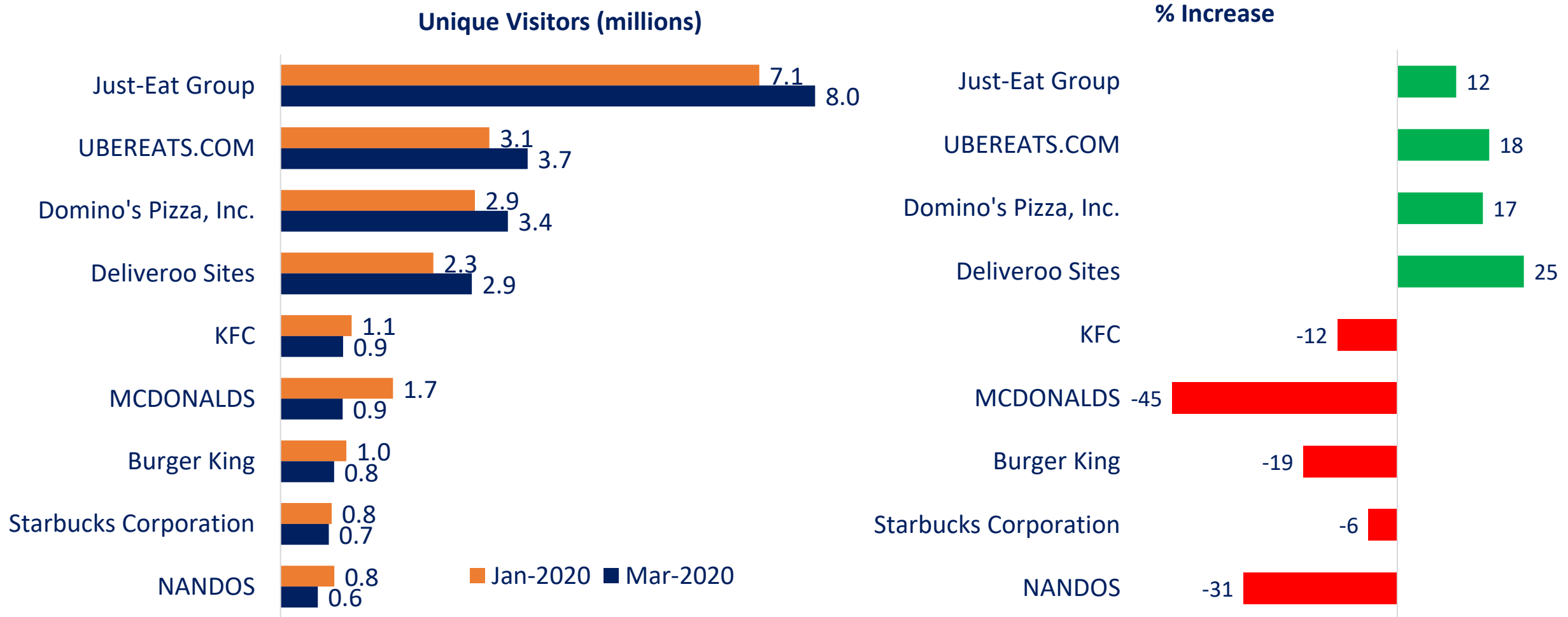


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
*Custom Created Group

Food Retailers*: Unique Visitor Change Jan-Mar 2020

Food Delivery services benefited from lockdown

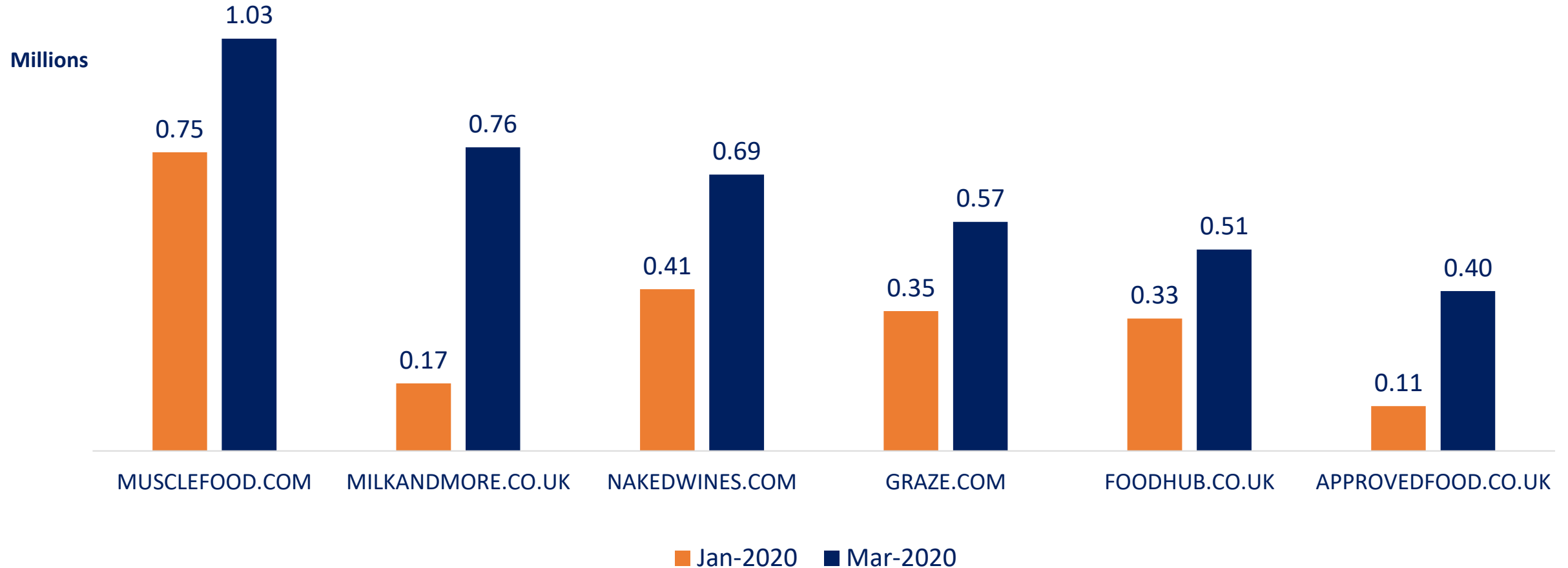


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
*Custom Created Group

Other Food Retailers: Unique Visitor Change Jan-Mar 2020

Smaller food and drink retailers experienced uplift in visitors



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

News & Information

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Key Changes: Jan-Mar 2020

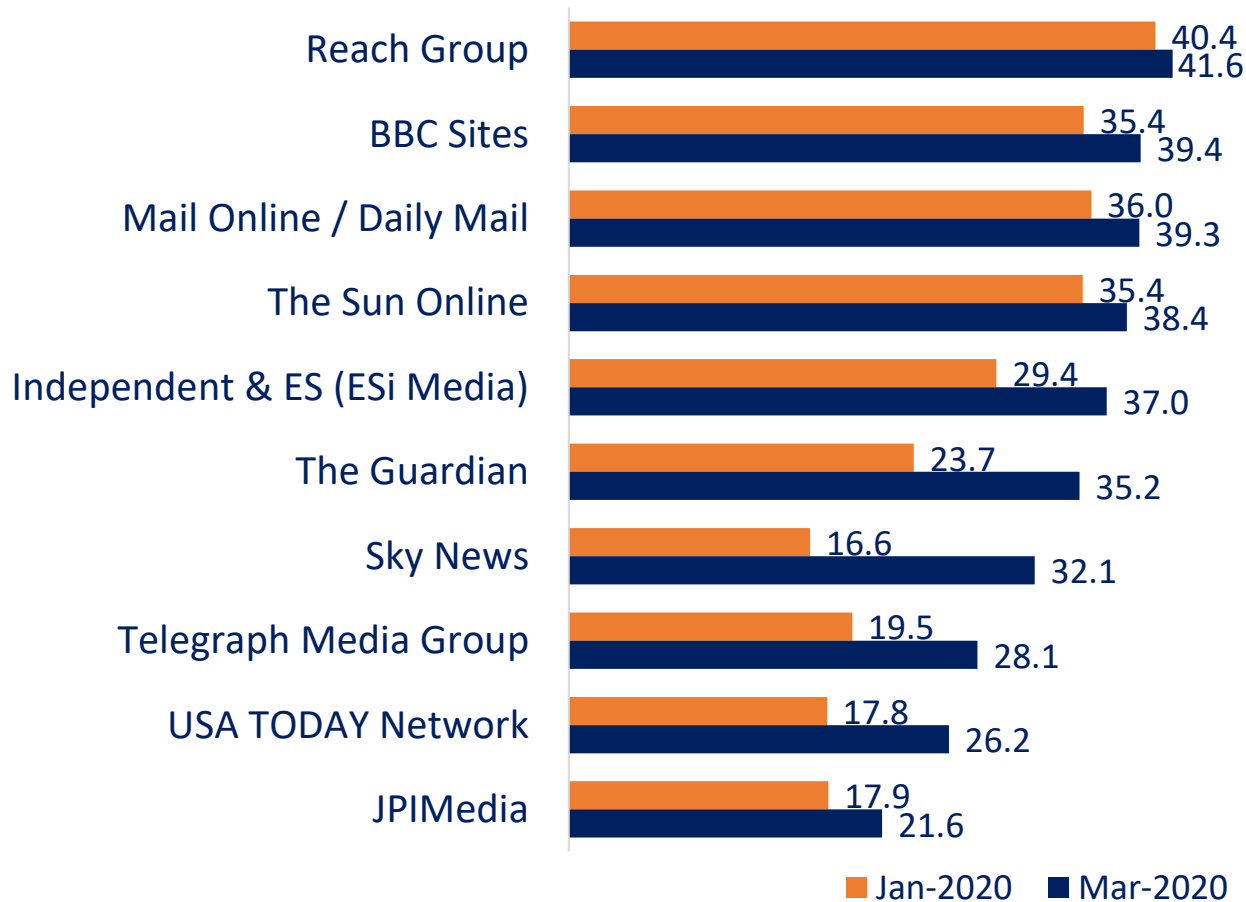
- Total Minutes +28%
- Ave Mins/visitor +103mins
- Business/Financial News UVs +7m
- Politics News UVs +65%



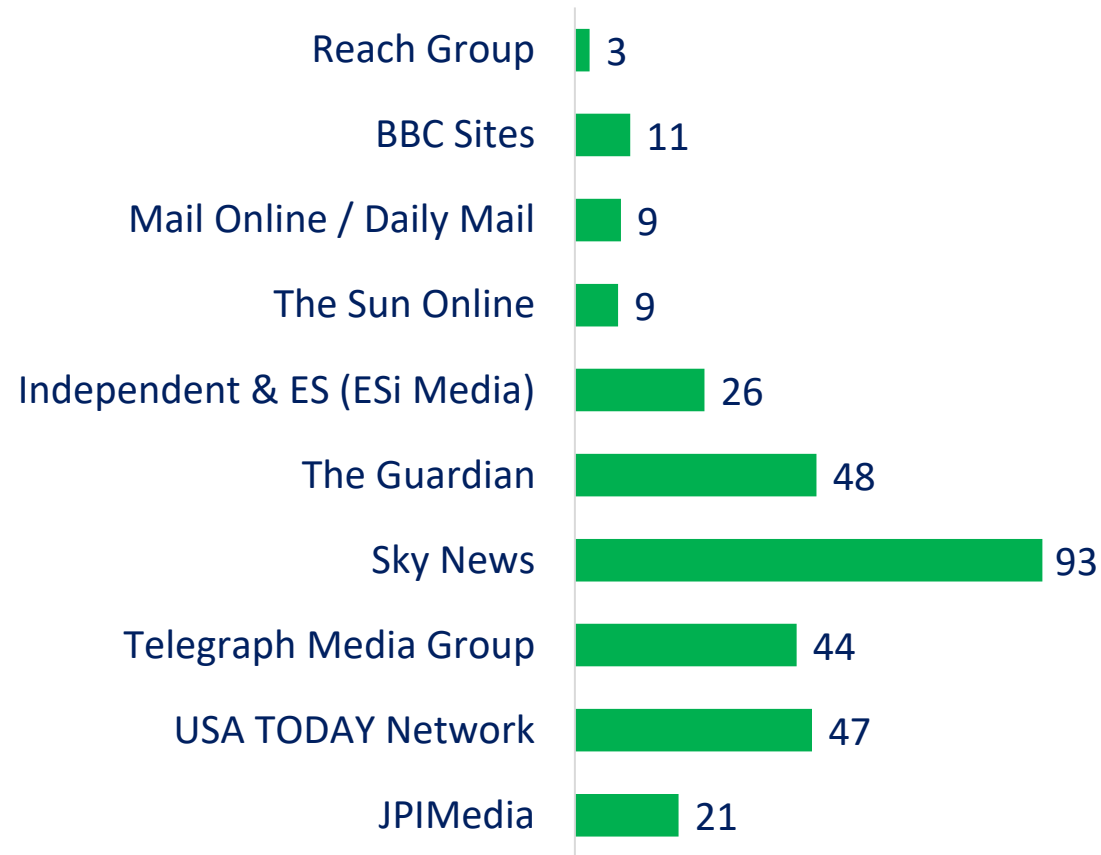
All News/Information: Unique Visitor Change Jan-Mar 2020

Top 10 News Properties all witnessed gains

Unique Visitors (Millions)



% Increase

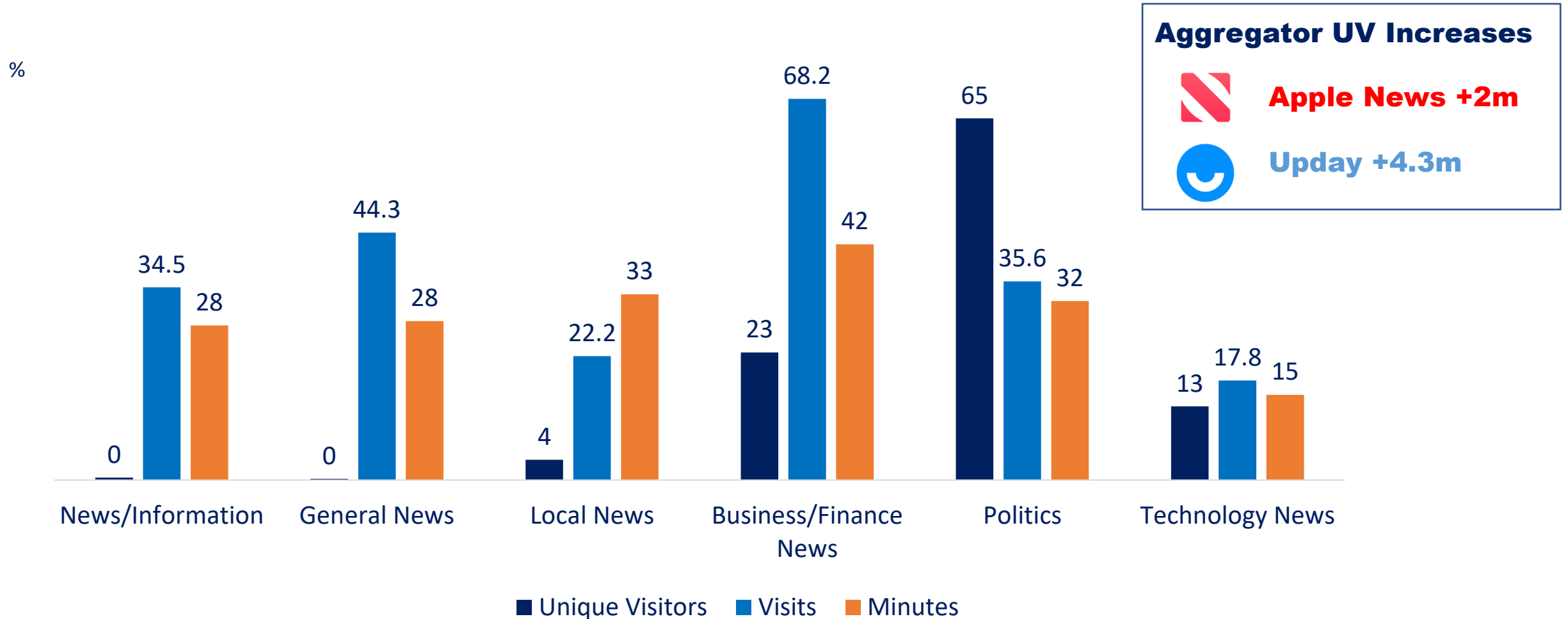


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

News Categories: Usage Metrics % Change Jan-Mar 2020

People are consuming MORE news from a wide range of sources

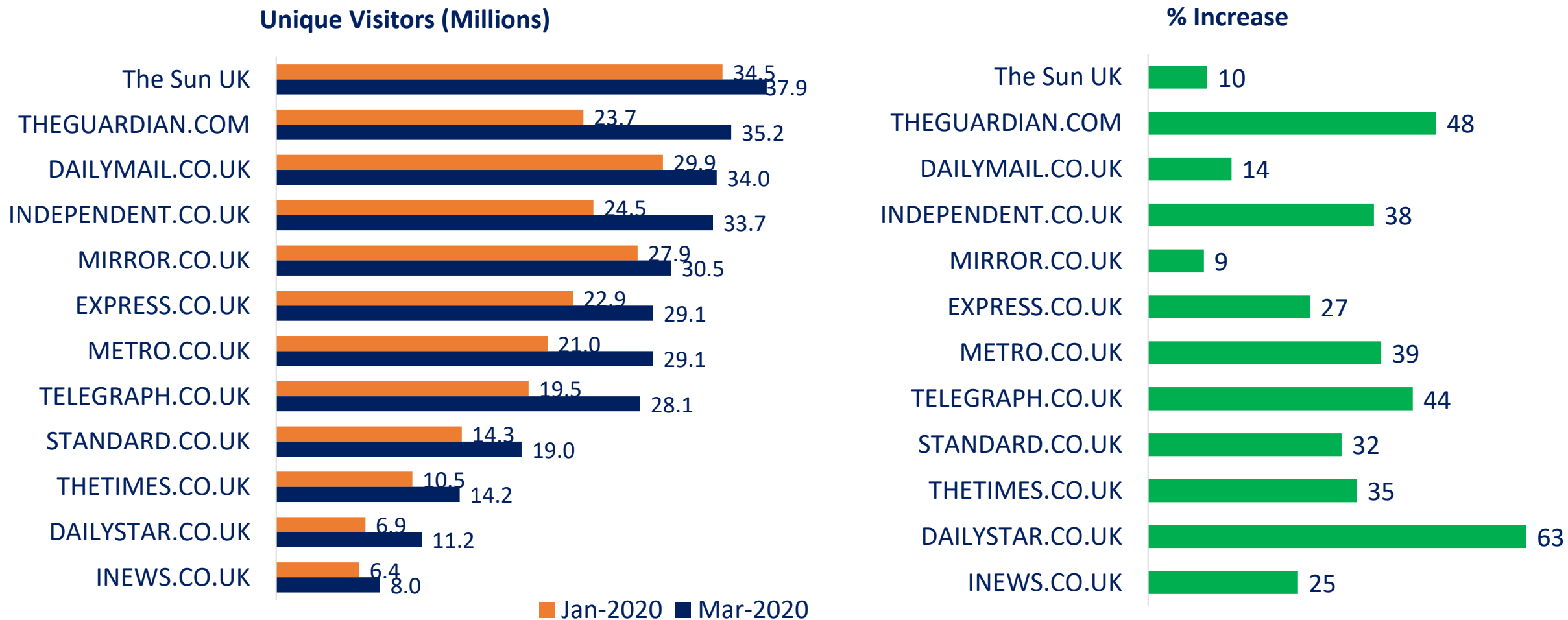


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

UK Online Daily Newspapers: Unique Visitors Jan-Mar 2020

The Qualities all experienced >25% growth in visitors

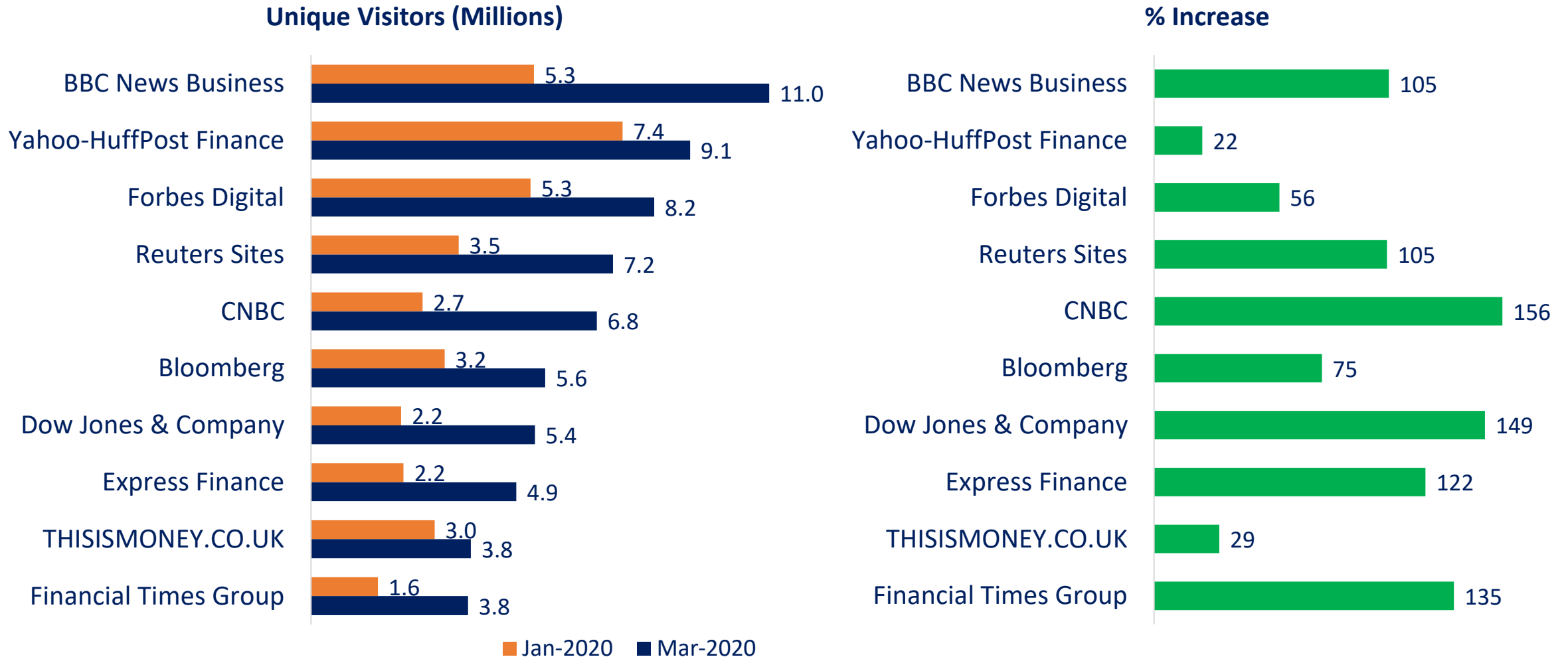


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Business/Finance News: Unique Visitors Jan-Mar 2020

An additional 7m adults visited Business News sites +23%



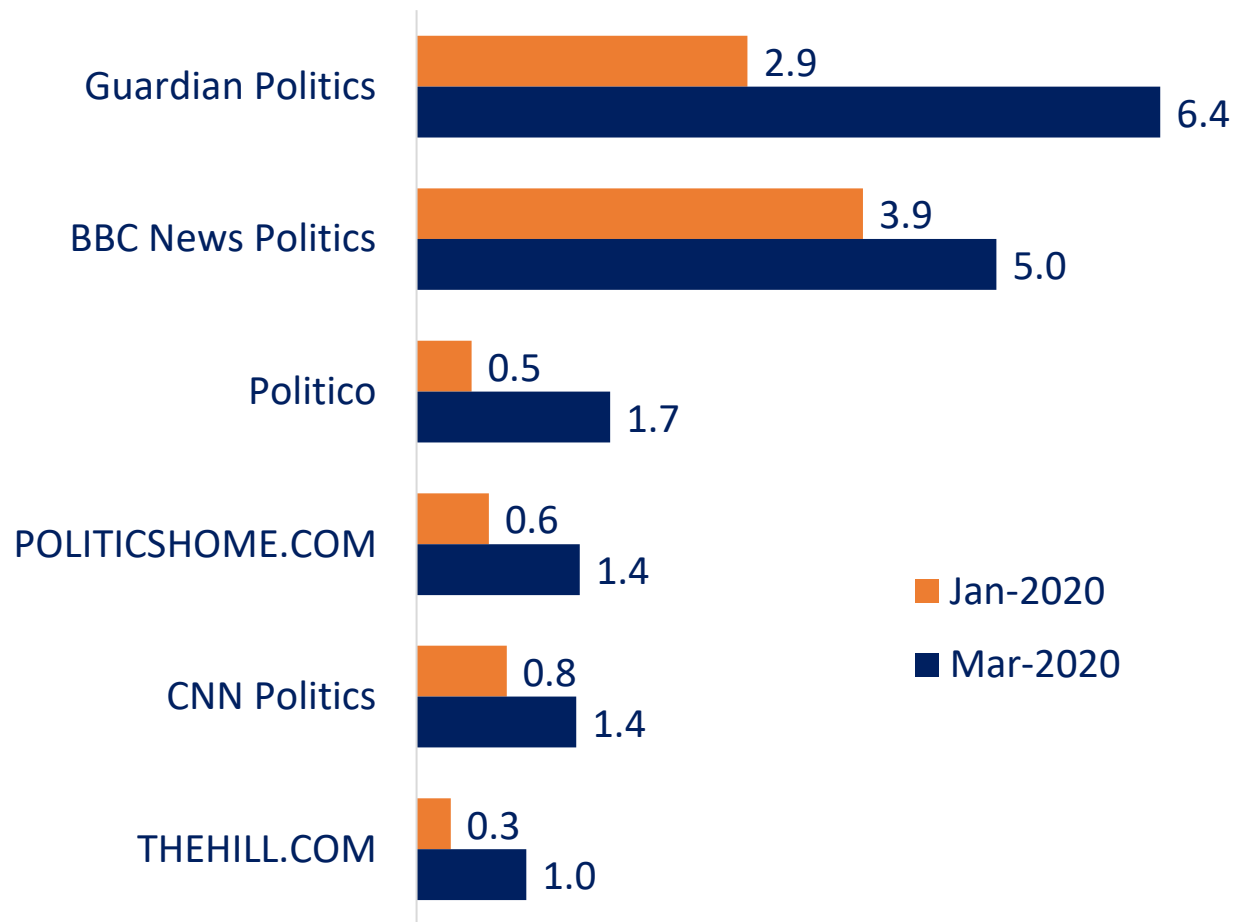
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

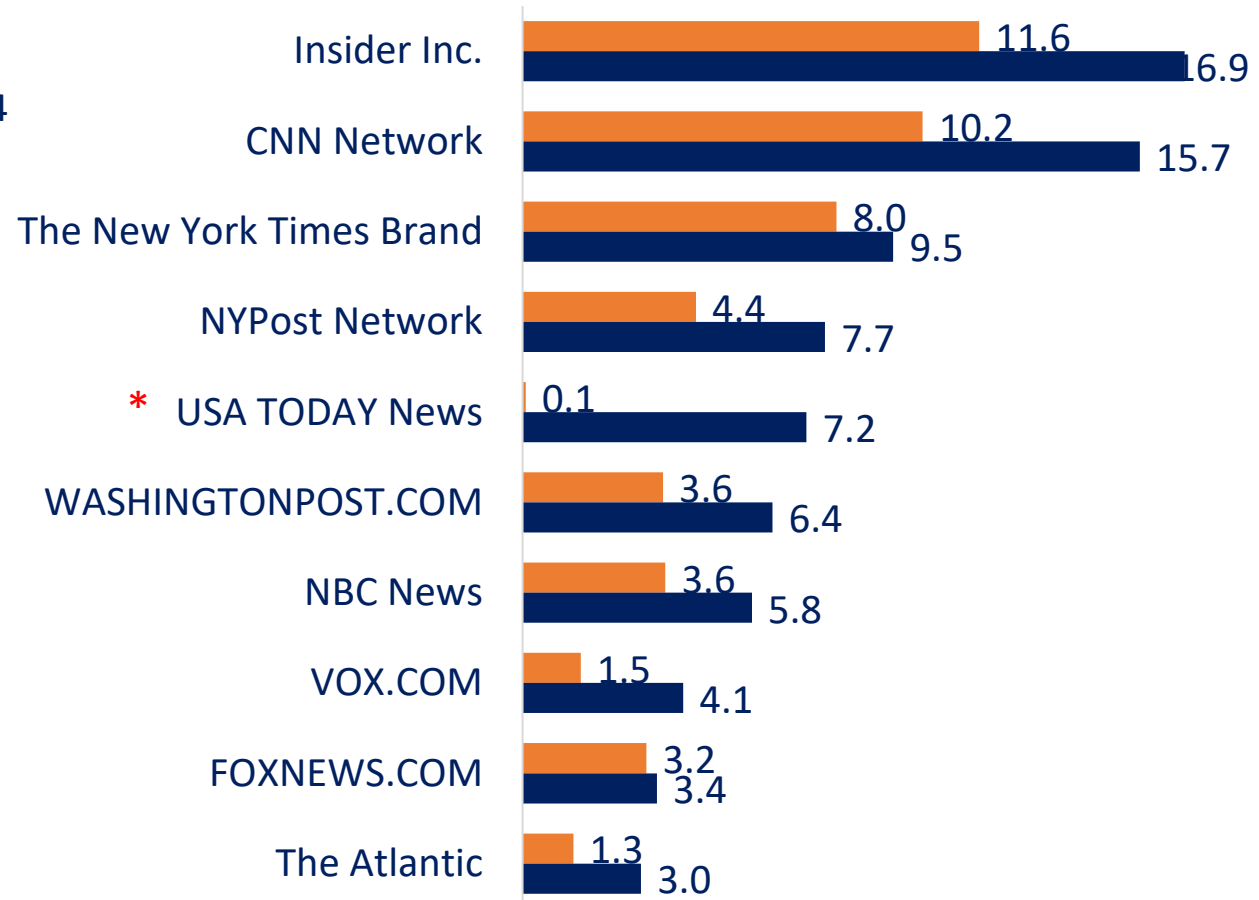
Politics & US News* Brands: Unique Visitors Jan-Mar 2020

UK Online users increasingly consuming Global content

Unique Visitors (Millions)



Unique Visitors (Millions)



Jan-2020
Mar-2020

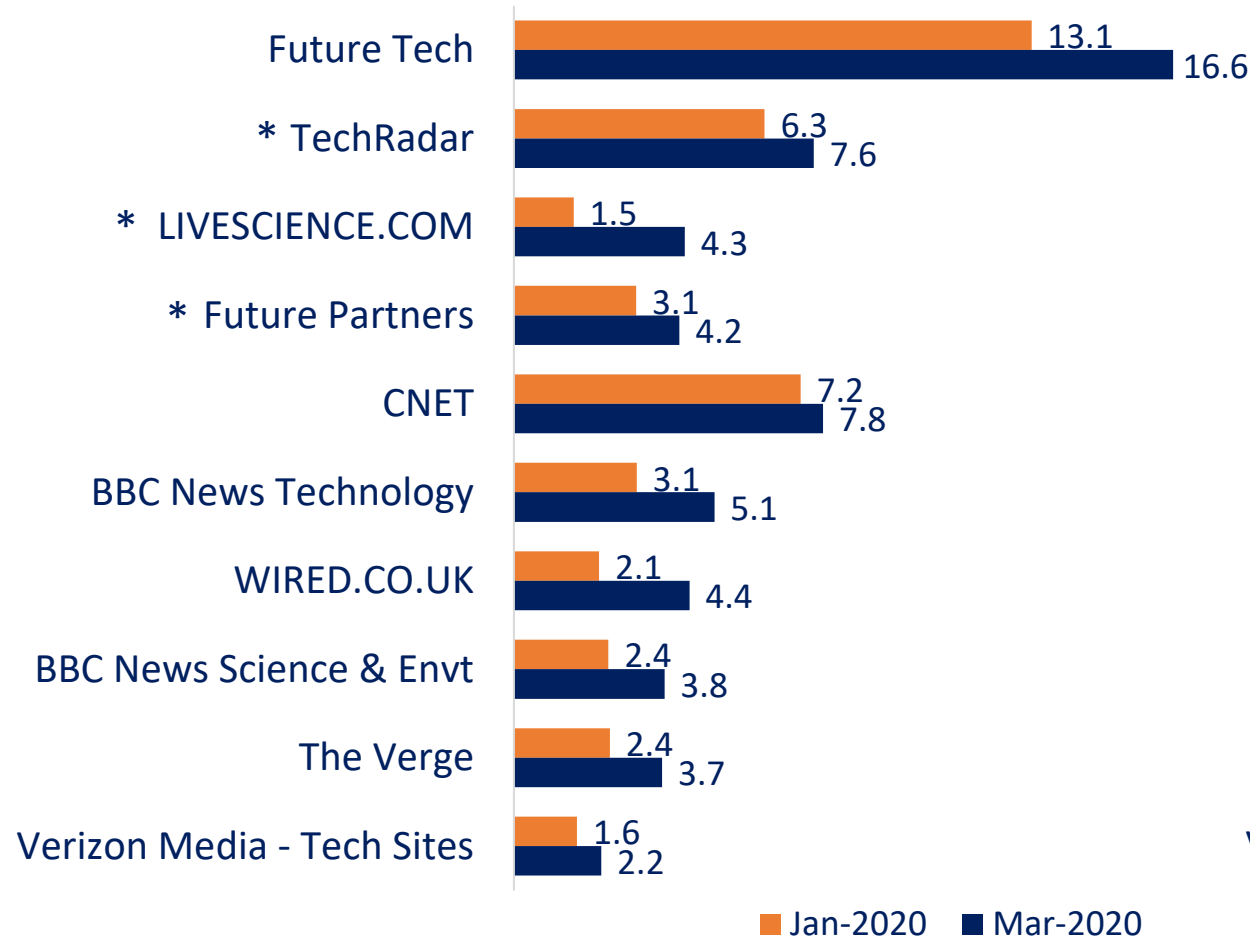
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
*US News brands manually selected from 'General News' Category. * USA Today News Jan data under investigation by Comscore

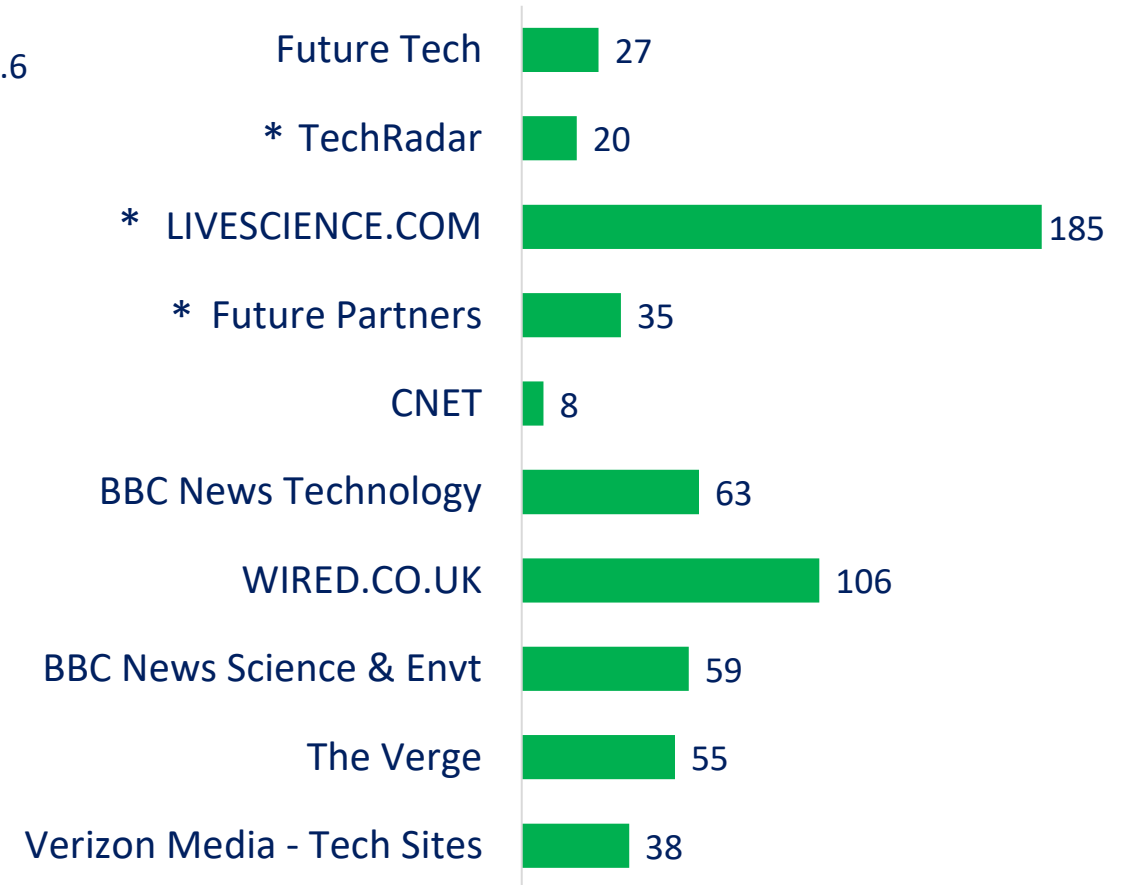
Technology News: Unique Visitors Jan-Mar 2020

An additional 4m adults visited Technology News sites +13%

Unique Visitors (Millions)



% Increase



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

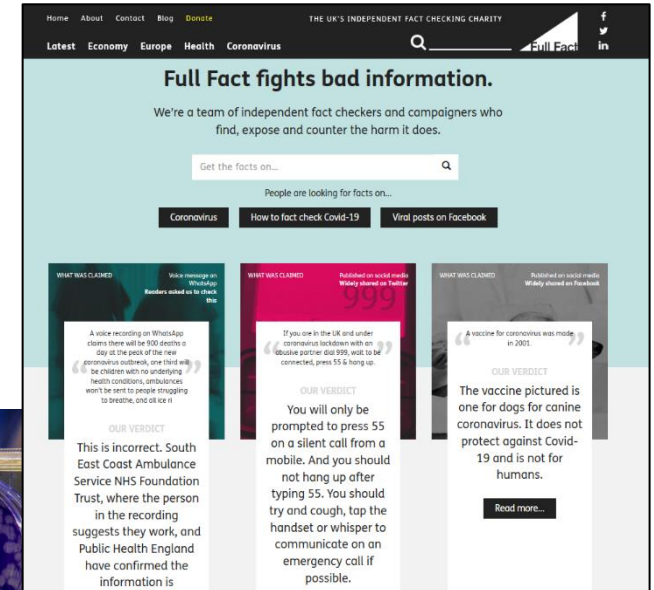
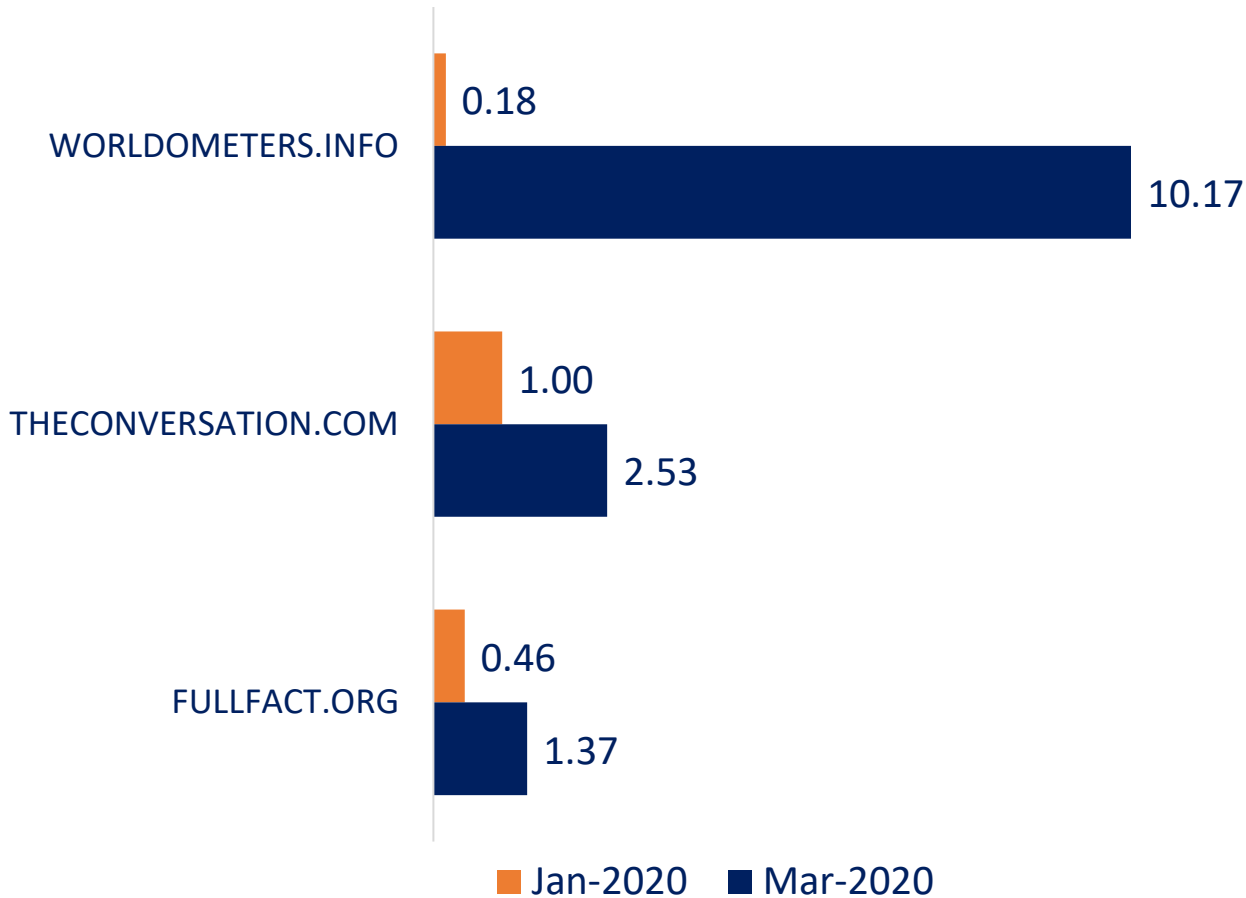
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

* Channels within the Media Title Future Tech

Facts & Stats : Unique Visitors Jan-Mar 2020

Growing use of 'credible sources' & 'official stats'

Unique Visitors (Millions)



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Social Networking

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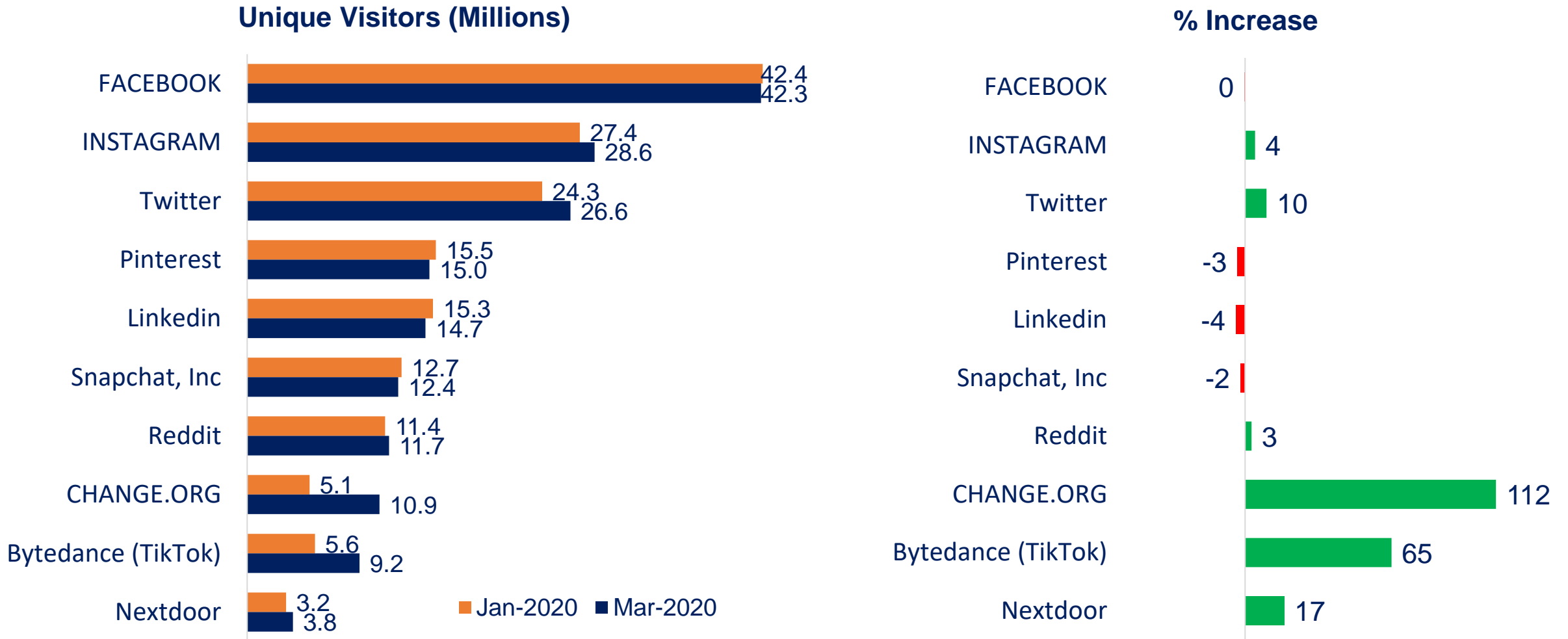
Key Changes: Jan-Mar 2020

- Total Minutes +8%
- Ave Mins/visitor +205mins



Social Networking : Unique Visitors Jan-Mar 2020

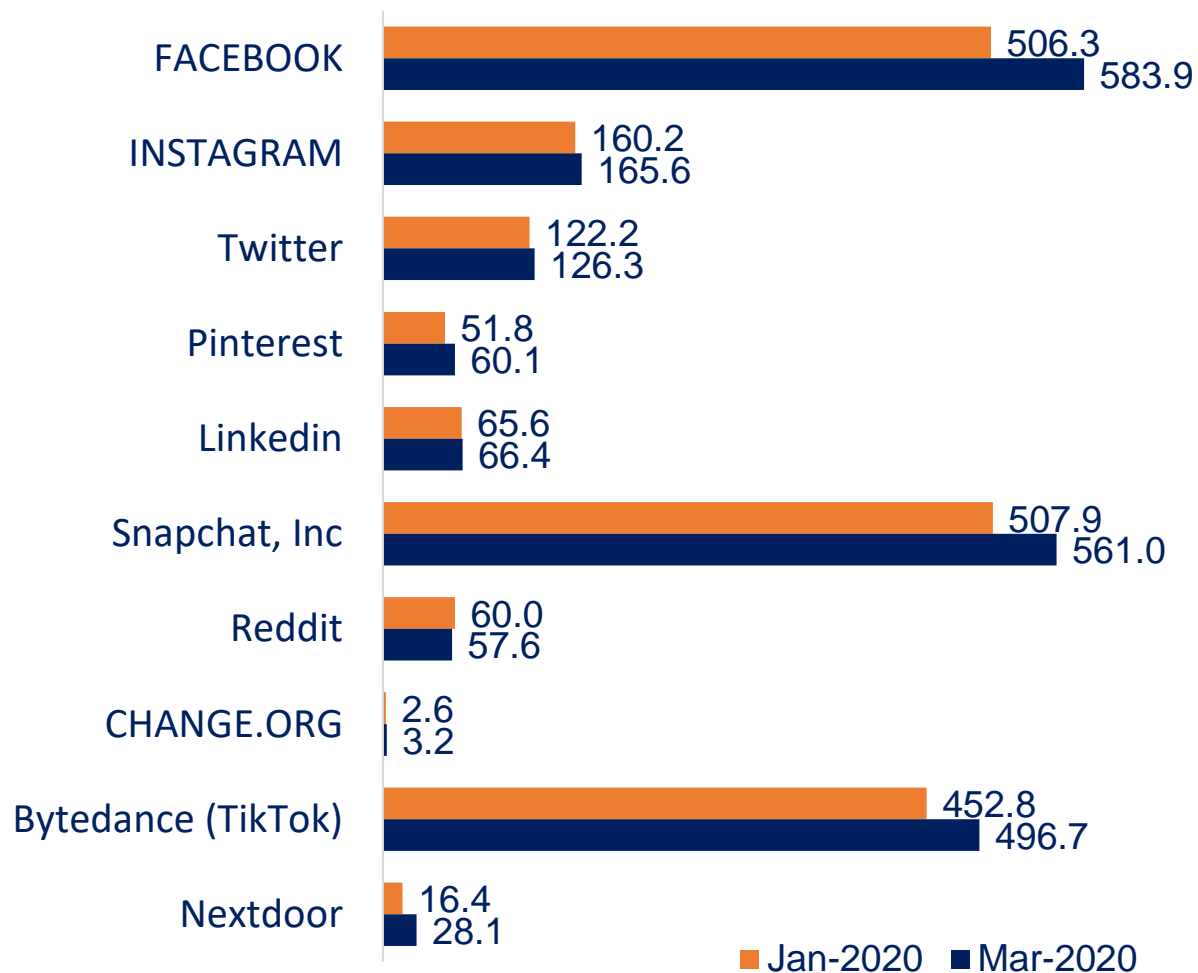
TikTok and Change.Org add most visitors



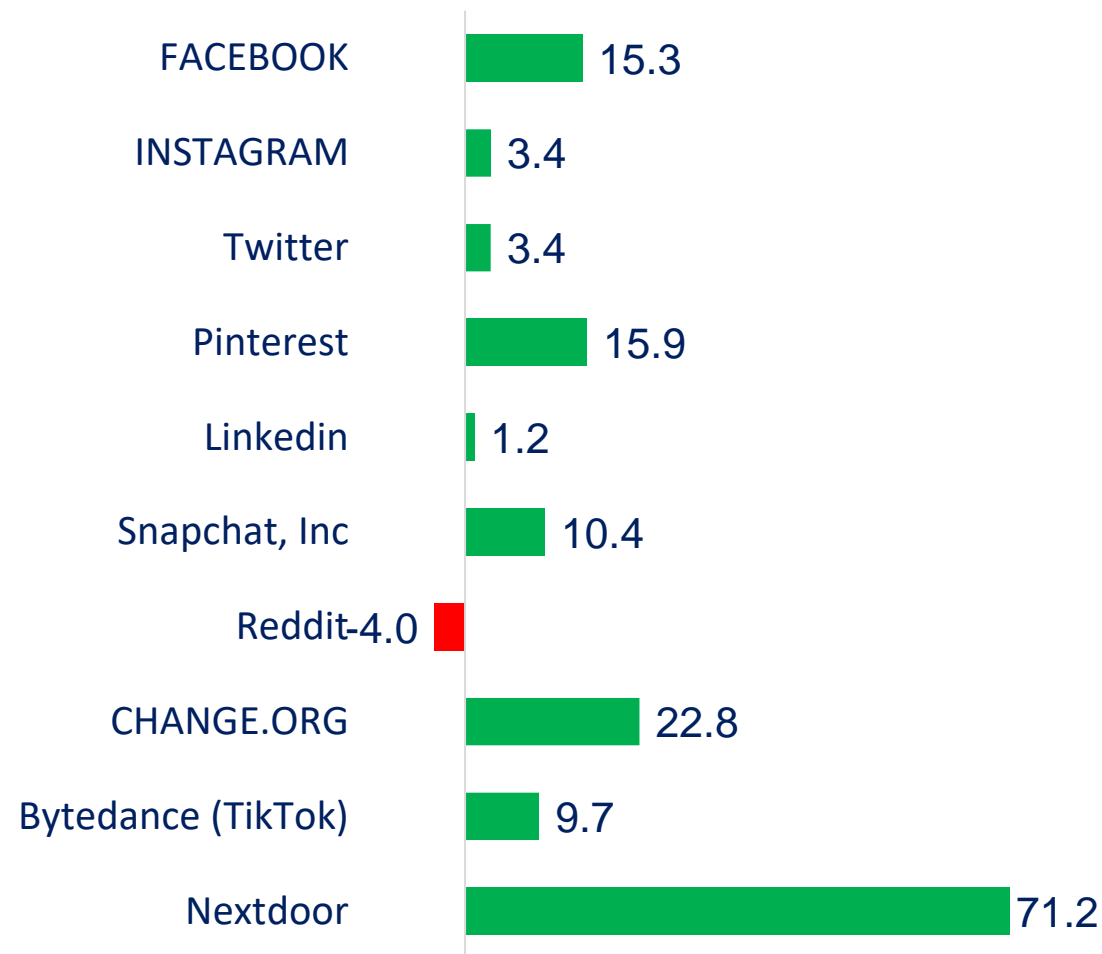
Social Networking: Ave Minutes Per Visitor Jan-Mar 2020

Facebook visitors spend an additional 77 minutes on the service

Average Minutes Per Visitor



% Increase



IM and Video Chat

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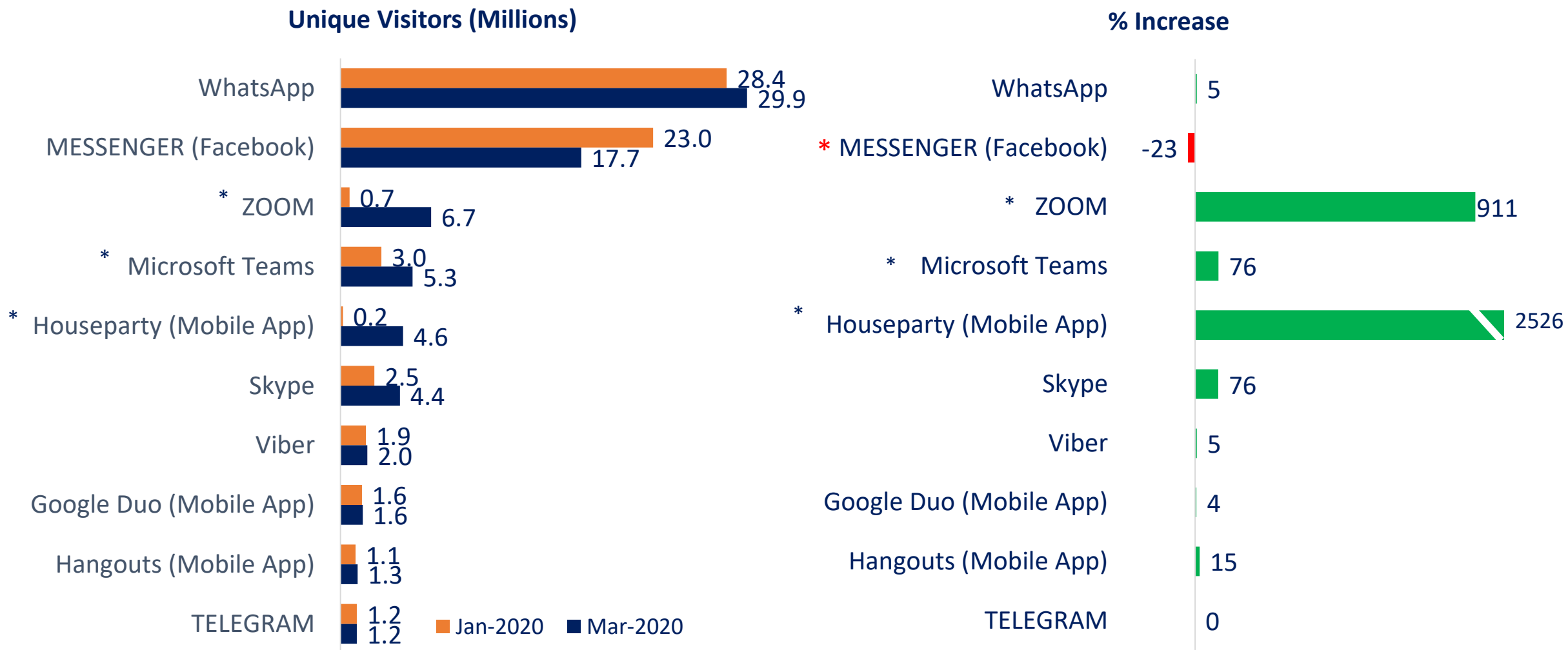
Key Changes: Jan-Mar 2020

- IM minutes +32%
- IM Ave Mins/visitor +149mins



IM & Video Chat*: Unique Visitors Jan-Mar 2020

Consumers in lockdown have turned to Video Chat/Conferencing

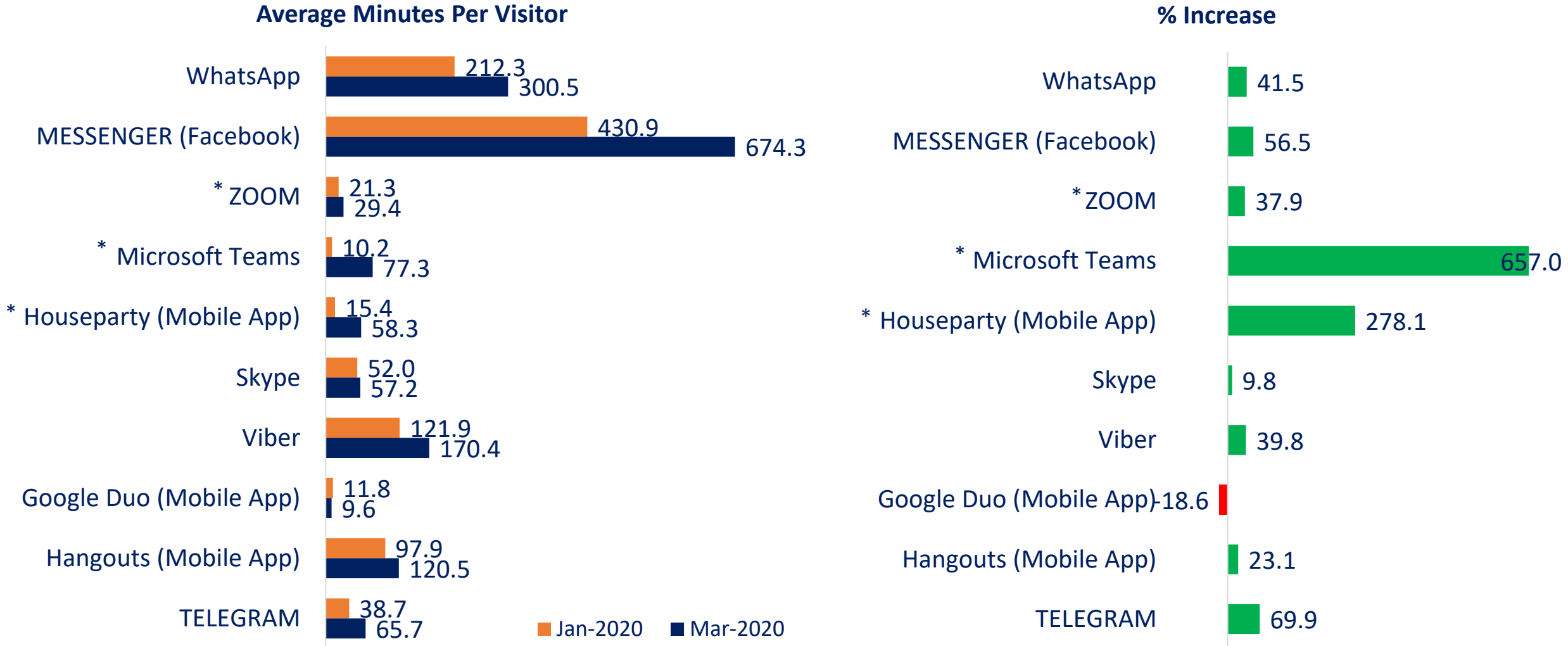


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK. MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.

*These properties were added manually to the list from a NON-IM category for comparison purposes . * Facebook IM data under investigation by Comscore

IM & Video Chat*: Average Minutes per Visitor Jan-Mar 2020

Visitors are spending a lot more time on IM & Video chat apps



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK. MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.

*These properties were added manually to the list from a NON-IM category for comparison purposes and the category has been relabelled 'Video Chat'

Government

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Key Changes: Jan-Mar 2020

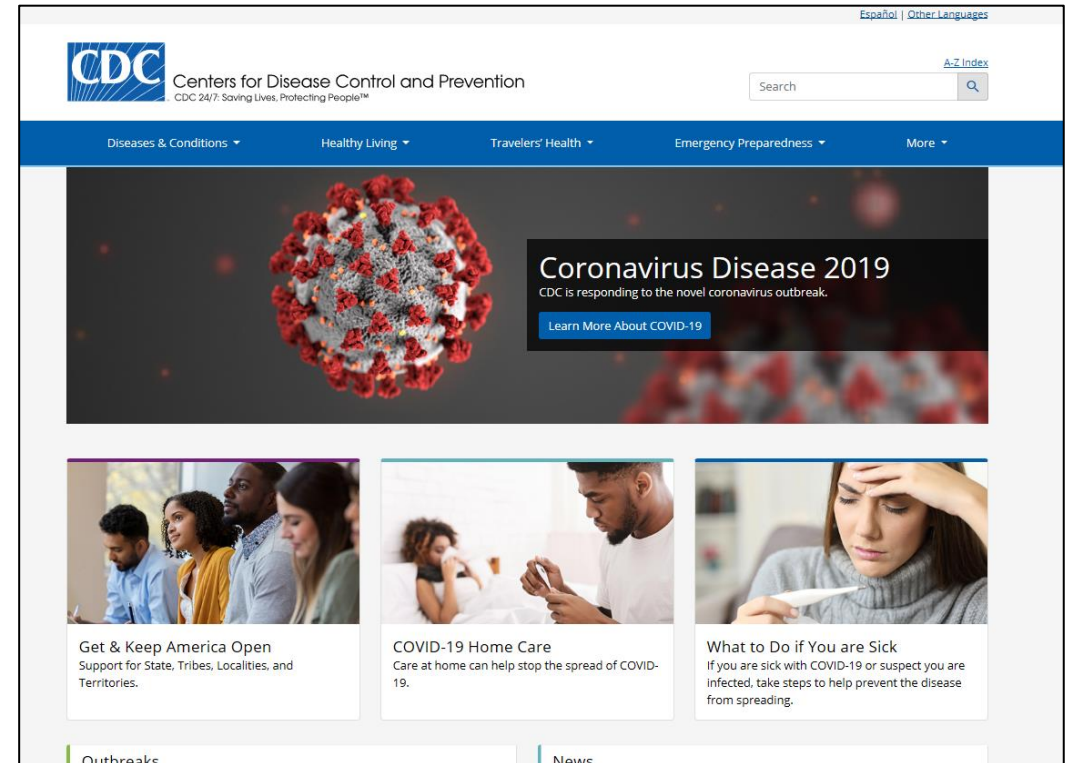
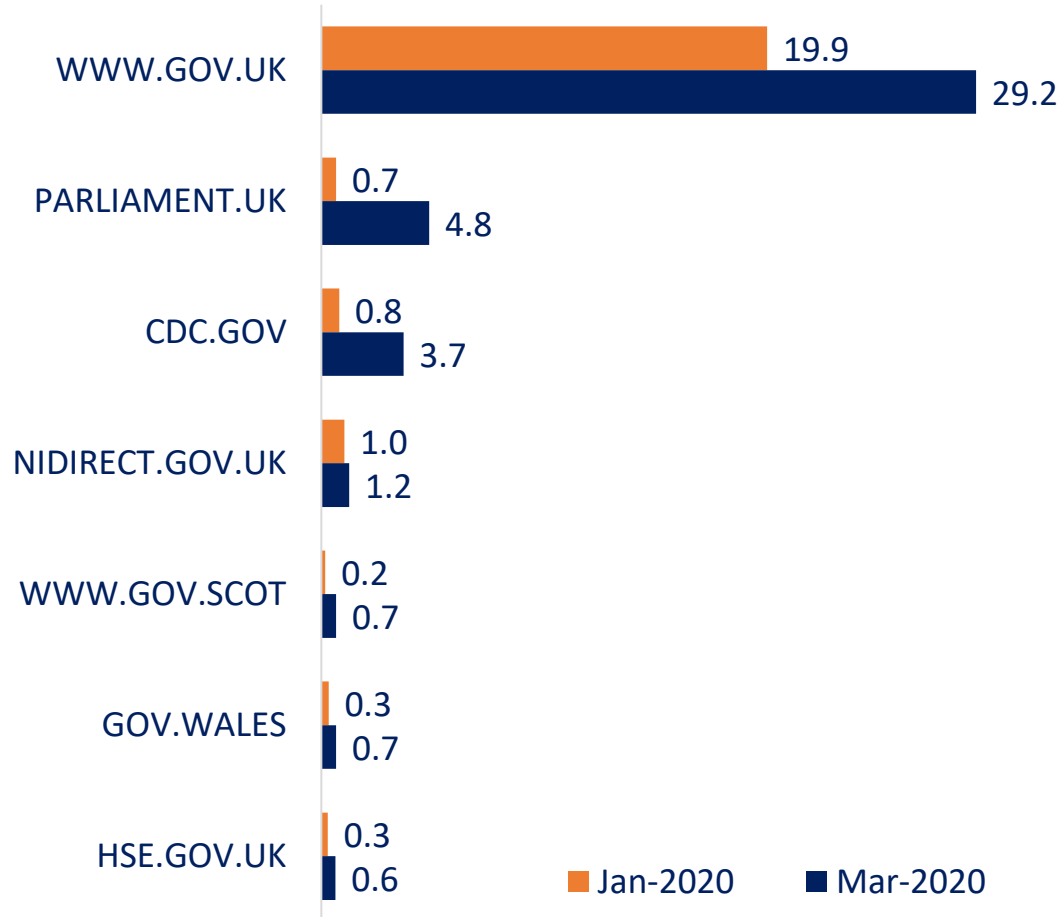
- Unique Visitors +19%
- Unique Visitors +5.6m



Government : Unique Visitors Jan-Mar 2020

www.gov.uk adds almost 10m visitors in a month

Unique Visitors (millions)



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Health

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Key Changes: Jan-Mar 2020

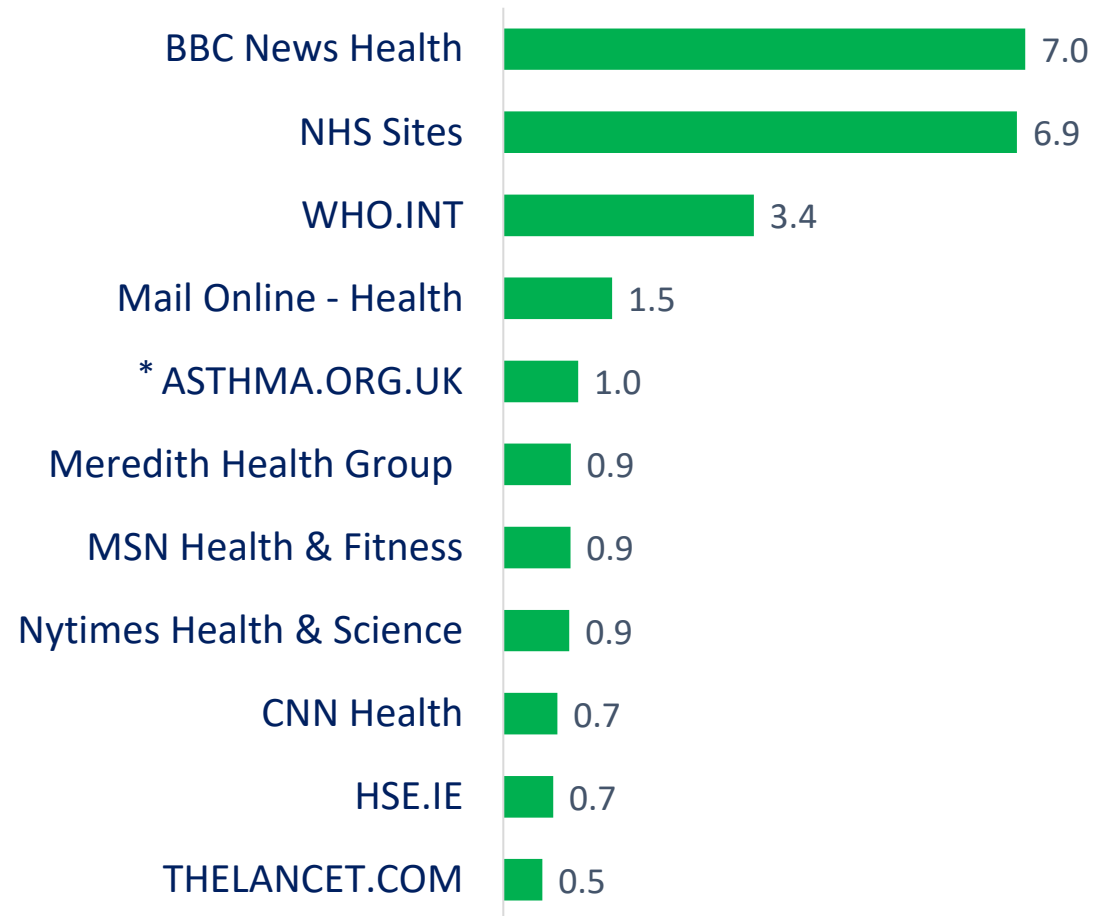
- Unique Visitors +2m
- Visits +27%



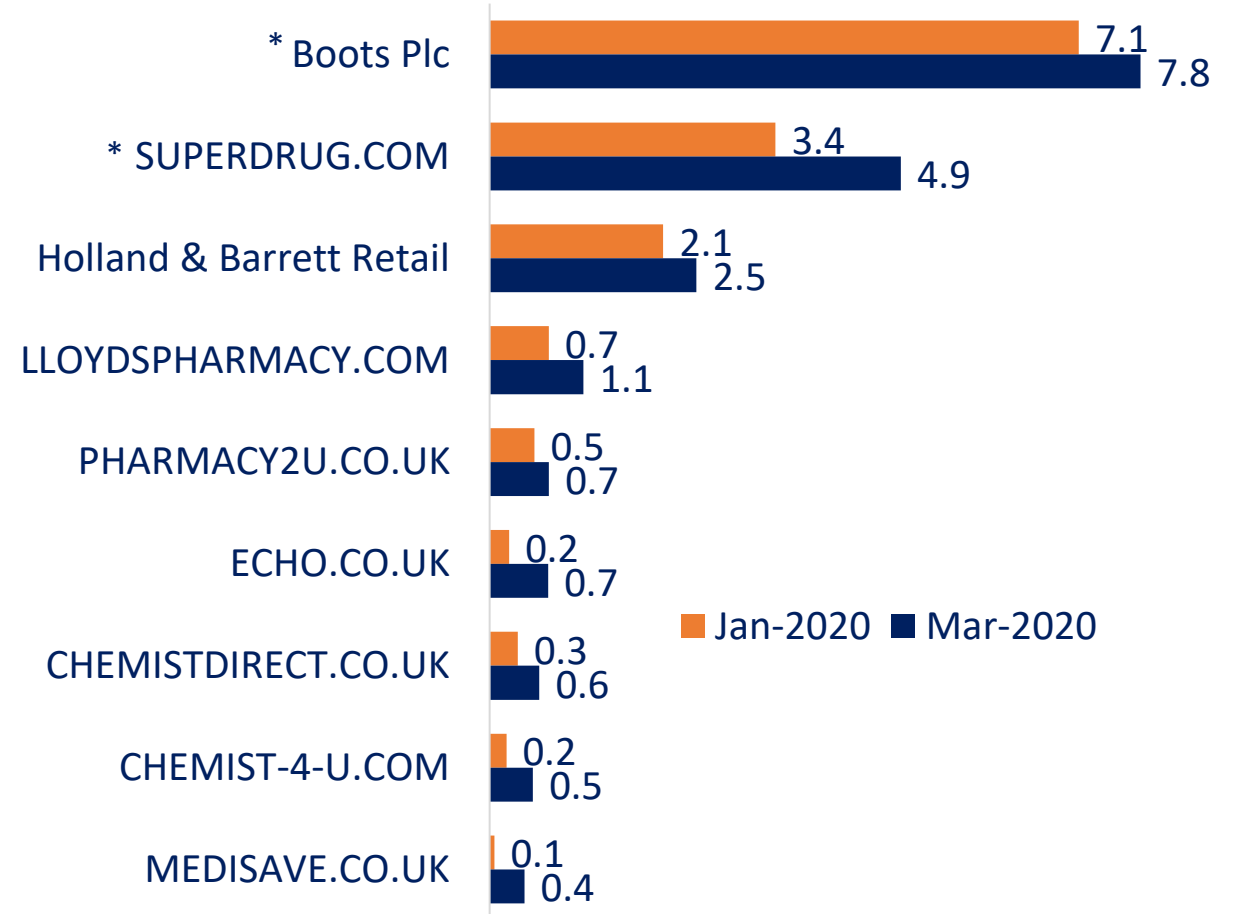
Health Sites & Retailers: Unique Visitor Change Jan-Mar 20

Consumers are seeking health information and health products online

Health Sites: Additional Unique Visitors (millions)



Healthcare* Retailers: Unique Visitors (Millions)



Jan-2020 Mar-2020

Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK. MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.

*These were not listed in the Health and Healthcare retail categories so were manually added for comparison purposes

Education

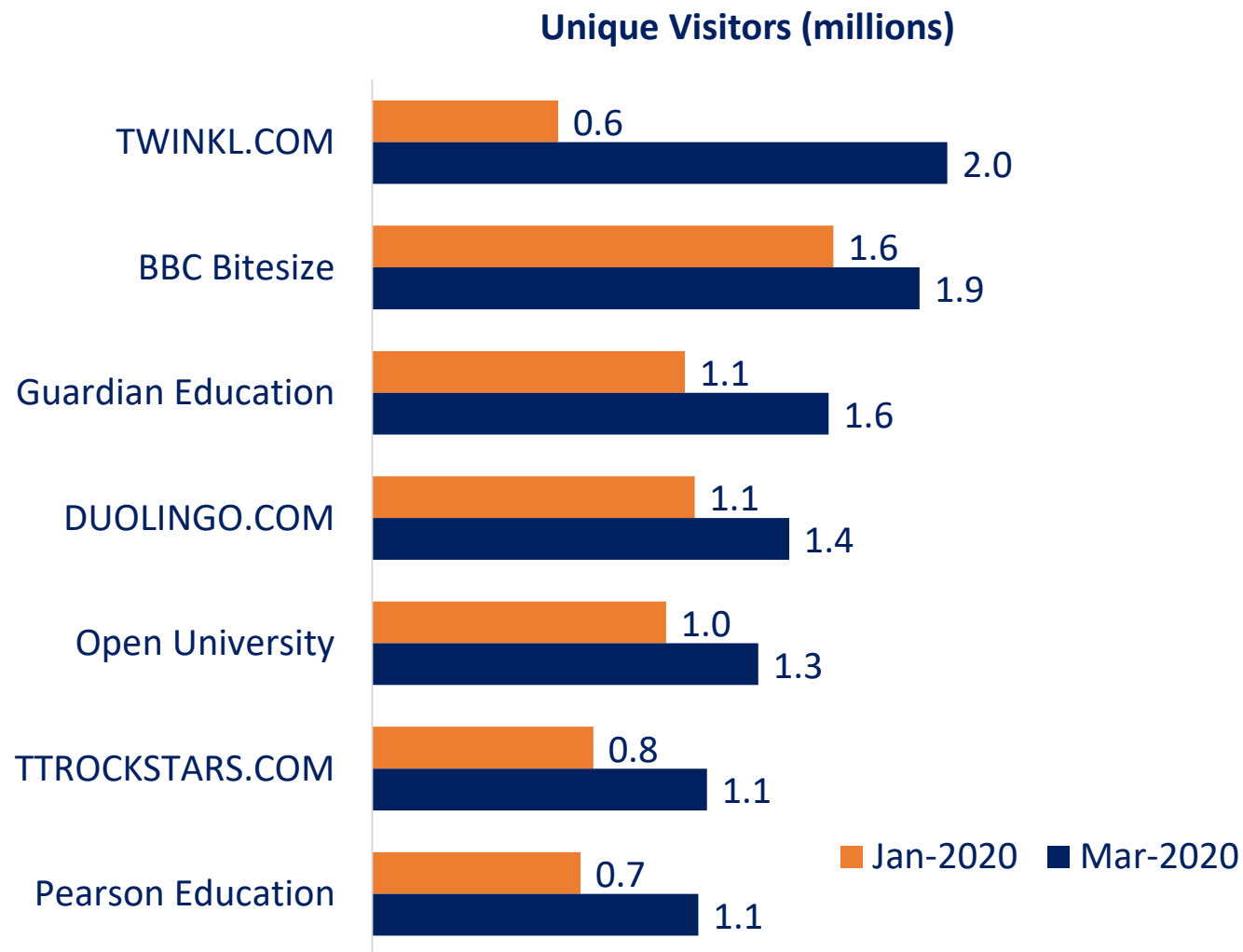
Key Changes: Jan-Mar 2020

- UVs +5% (+9% with kids)
- Mins +39% (+43% with kids)
- Visits +19% (+32% with kids)



Education: Unique Visitors Jan-Mar 2020

Home schooling has contributed to visitor growth across sites



Self isolation imagined...



Self isolation actual...



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Entertainment

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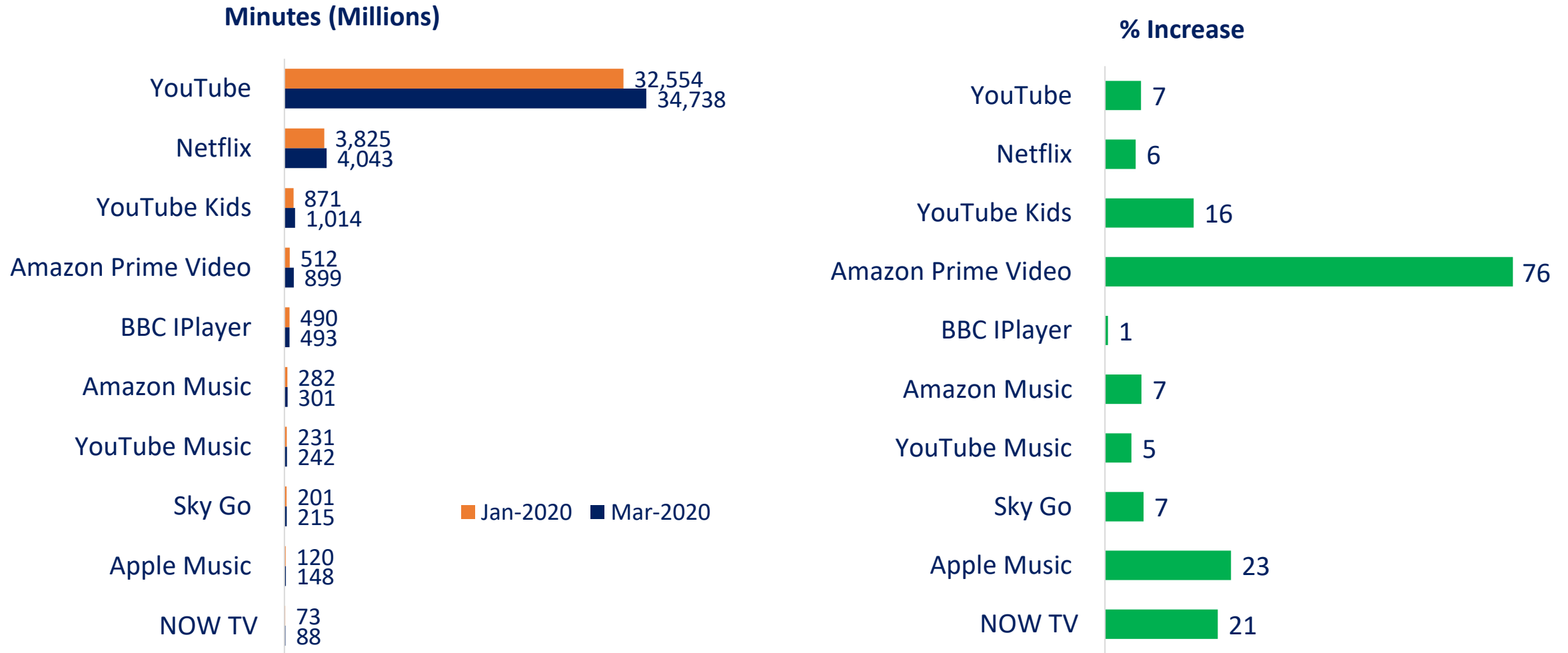
Key Changes: Jan-Mar 2020

- Mins +5%
- Ave Mins/visitor +65mins



Entertainment Apps Time Online Growth: Jan-Mar 2020

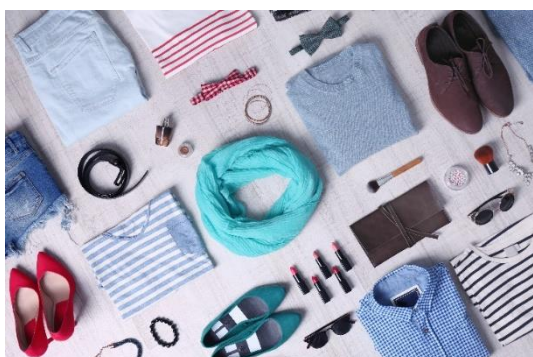
An additional 2.1 billion minutes on YouTube's App is driving the increase



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Categories Negatively Impacted Jan-Mar 2020

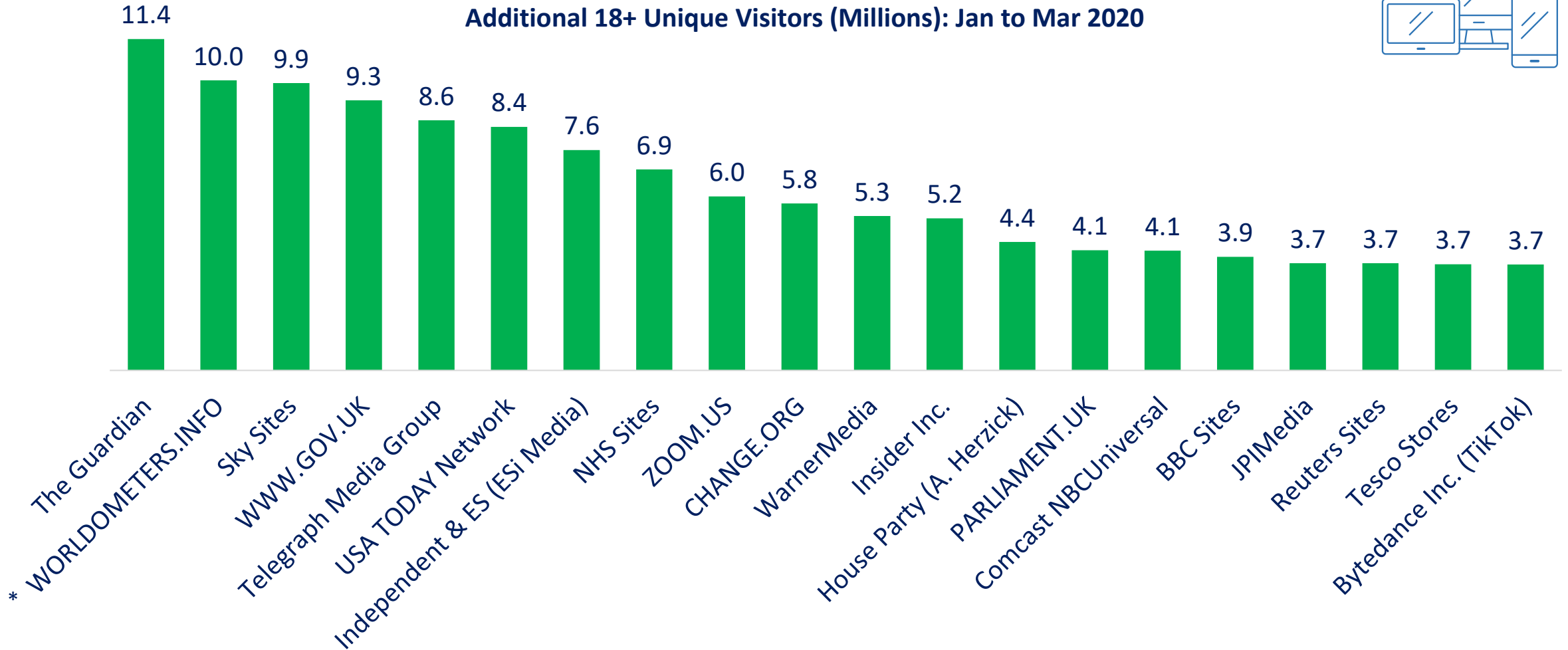
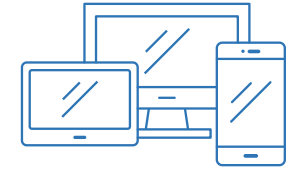


Top Growth Properties & Mobile Apps

Jan-Mar 2020



Properties adding MOST Unique Visitors: Jan-Mar 2020



*

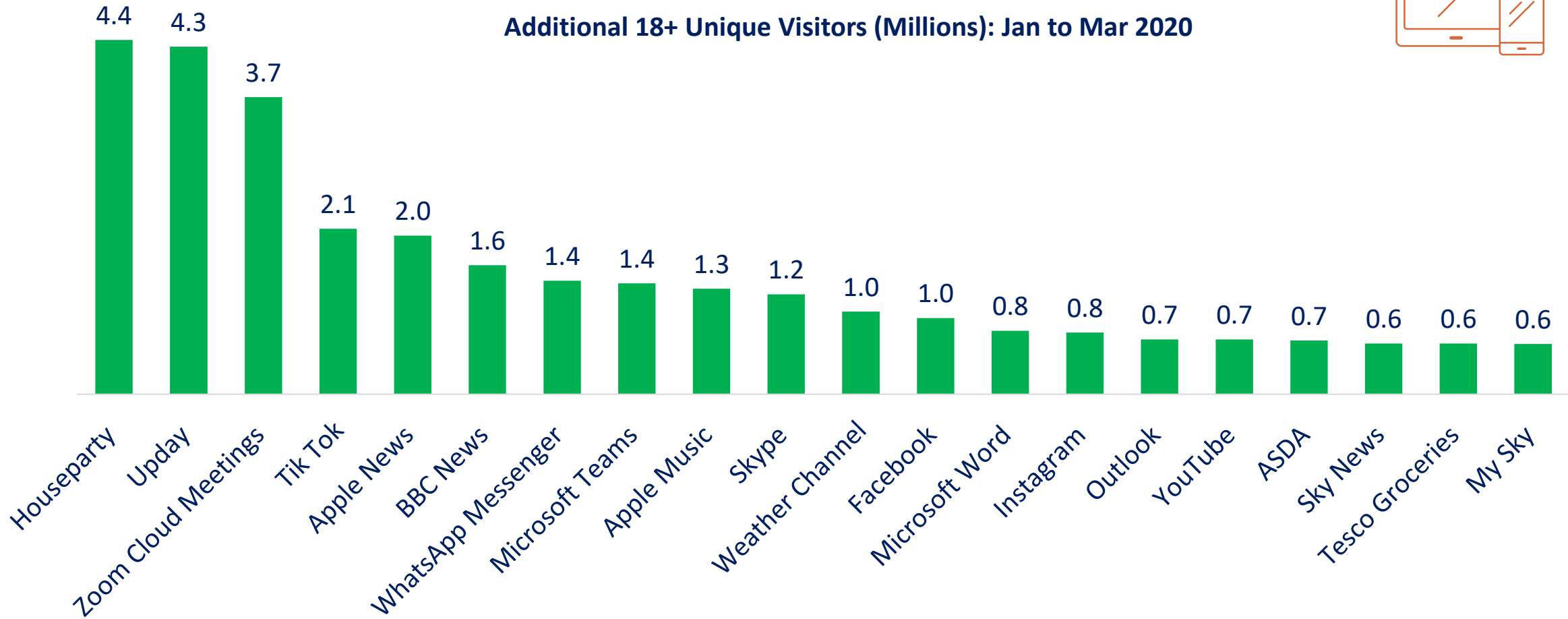
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
*Worldometers.info web domain has replaced the 'FreeStar' property in this analysis as Worldometers was driving the growth

Mobile Apps adding MOST Unique Visitors: Jan-Mar 2020



Additional 18+ Unique Visitors (Millions): Jan to Mar 2020



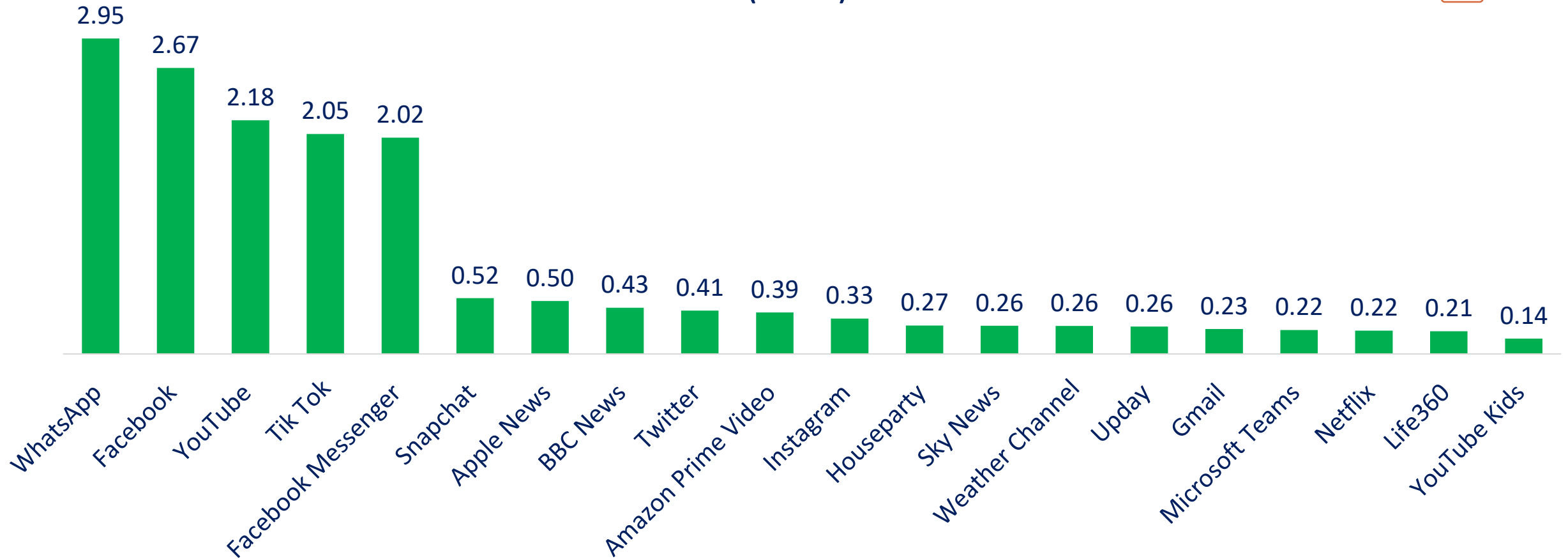
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Mobile Apps adding MOST Minutes: Jan-Mar 2020



Additional Minutes (Billions): Jan to Mar 2020



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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



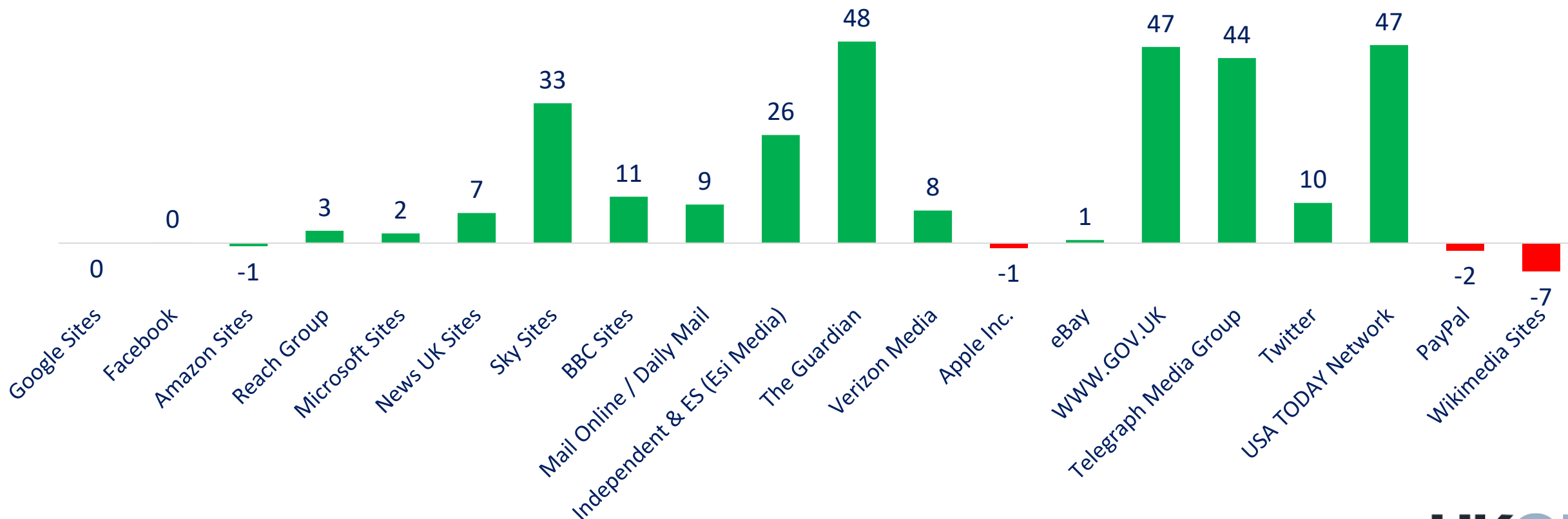
Top 20 Properties

Key Changes: Jan-Mar 2020



Top 20 'UV' Properties: Unique Visitor Change Jan-Mar 2020

Unique Visitor % Change: Mar 20 v Jan 20



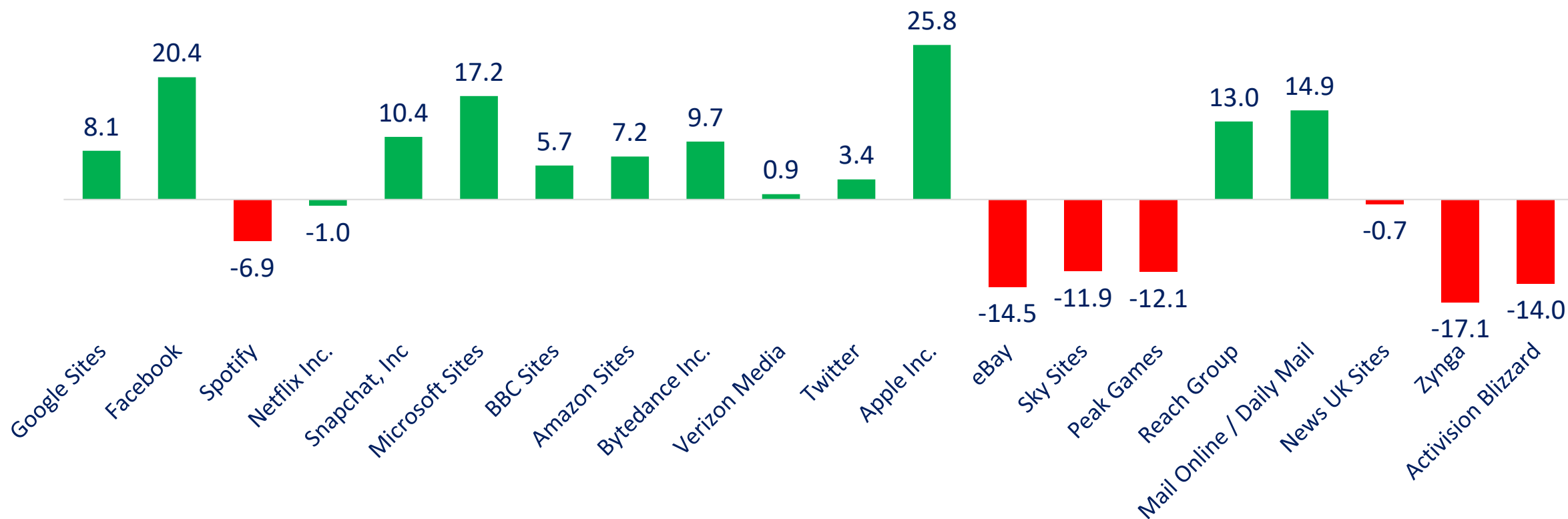
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

Top 20 'Time' Properties: Time Online Change Jan-Mar 2020



Time Online (mins) Change %: Mar 20 v Jan 20



Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK

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

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Digital Market Overview

Q4 | 2019

Q4 2019 UK Digital Market Overview report

Welcome to UKOM's Digital Market Overview for December 2019. Using UKOM approved Comscore data, the DMO shares insights into what the UK Population is doing online by providing a top-line snapshot of audience behaviour each

Q3 | 2019

Q3 2019 UK Digital Market Overview report

Digital Market Overview for September 2019. Key insights include: mobile's share of time online continues to grow, up from 78% in June to 81% in September – driven by smartphones (up from 67% to 71%). Online adults spent on average 3hrs 34mins per

Q2 | 2019

Q2 2019 UK Digital Market Overview report

Digital Market Overview for June 2019. Using UKOM approved Comscore data, the DMO shares insights into what the UK Population is doing online by providing a top-line snapshot of audience behaviour each quarter.

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Insights

WhatsApp's UK Audience

Facebook recently revealed that on New Year's Eve 100 billion messages were sent worldwide on WhatsApp with UK users sending over 900 million of them. UKOM looks at the popularity and growth of WhatsApp among different demographics in the UK over the last year.

29.01.2020

Fashion Retailers

In July 2019, 27 million UK adults visited clothing retailers online and every month Comscore reports on over 300 properties which are classified under the category 'Retail – Apparel'. To coincide with London Fashion week, UKOM explores usage of the category and identifies winners and losers over the last year.

16.09.2019

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

Contact Us

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

Categories Negatively Impacted Jan-Mar 2020



Travel

Hotels/home sharing -30% Uvs (-5.1m)
Online Travel agents -25% Uvs (-6.1m)
Travel info -18% Uvs (-6m)
Airlines -22% Uvs (-2.8m)
Ground/Cruise -19% Uvs (-3.5m)



Real Estate/Property

Unique Visitors -12% (-3.6m)
Minutes -25%



Non-Grocery Retail

Tickets -27% Uvs (-3m)
Clothing Apparel -7% Uvs (-2m)
Luxury goods/jewellery -16% Uvs



Automotive/Maps

Total Unique Visitors -8% (-2.2m)
Total Minutes -35%
Autos Manufacturer Uvs -5%
Autos Manufacturer Mins -47%
Maps/GPS/Traffic - 8% Uvs (-2.9m)



Career Services & Development

Career Resources -30% mins
Job Search -26% mins



Sport

Total Minutes -39%
Ave Mins/visitor -42 mins

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 (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

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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/