

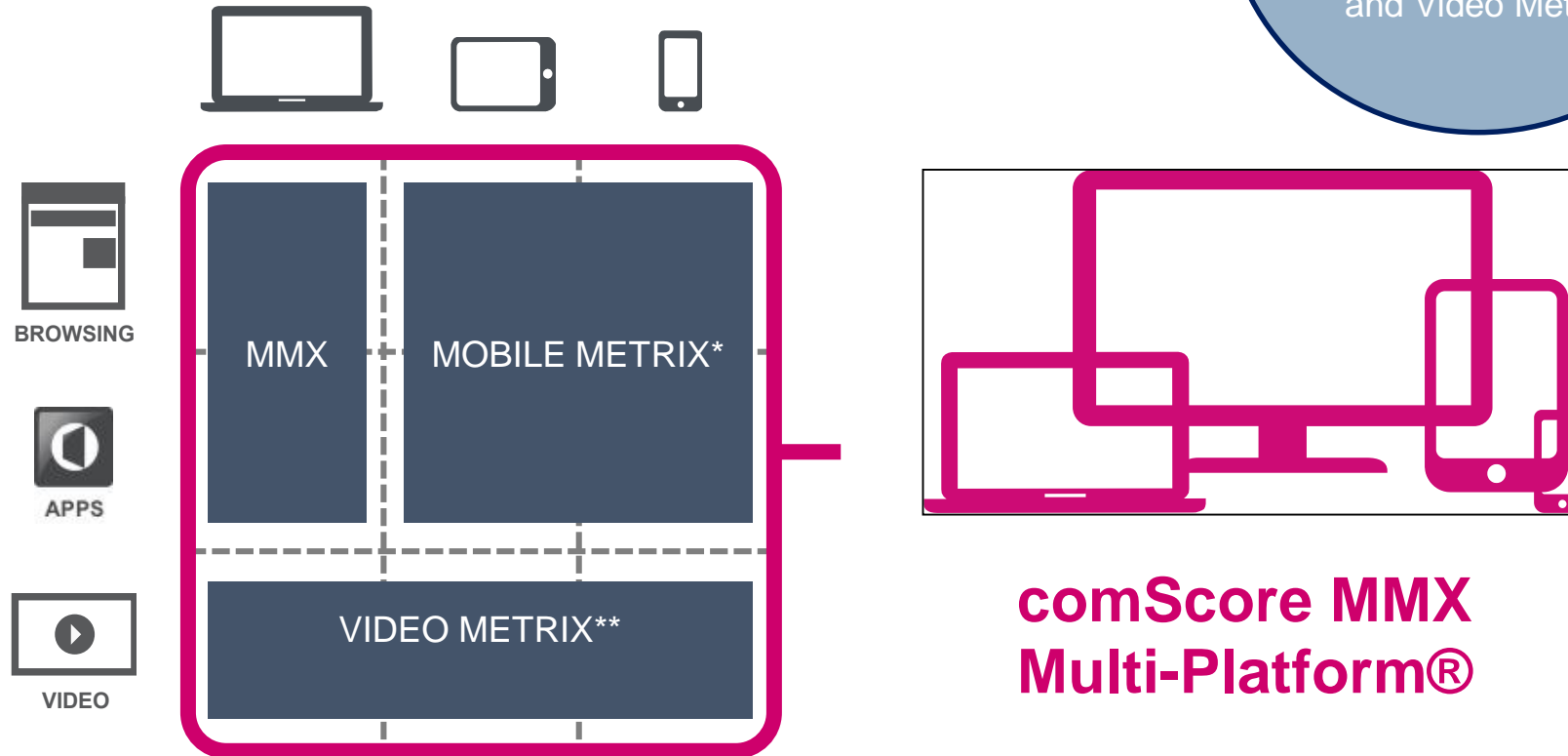
UK Digital Market Overview - Dec 2017



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



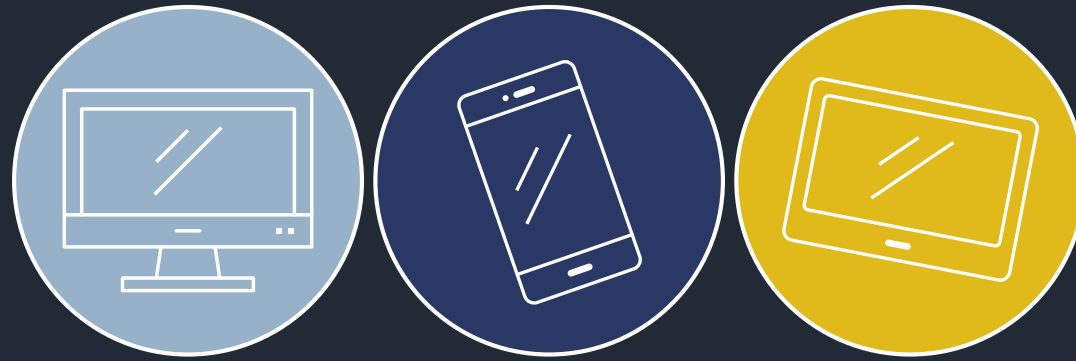
September 2017 Methodology Update

New developments in UK online audience measurement and changes in online universes

Effective with **September 2017 data** released in October 2017, the UK comScore audience product suite (MMX Multi-Platform, MMX, Video Metrix, Mobile Metrix) benefitted from **several methodology enhancements**. Related to these enhancements, reported data may show a break in trend. For additional information, please see the [attached FAQs](#).

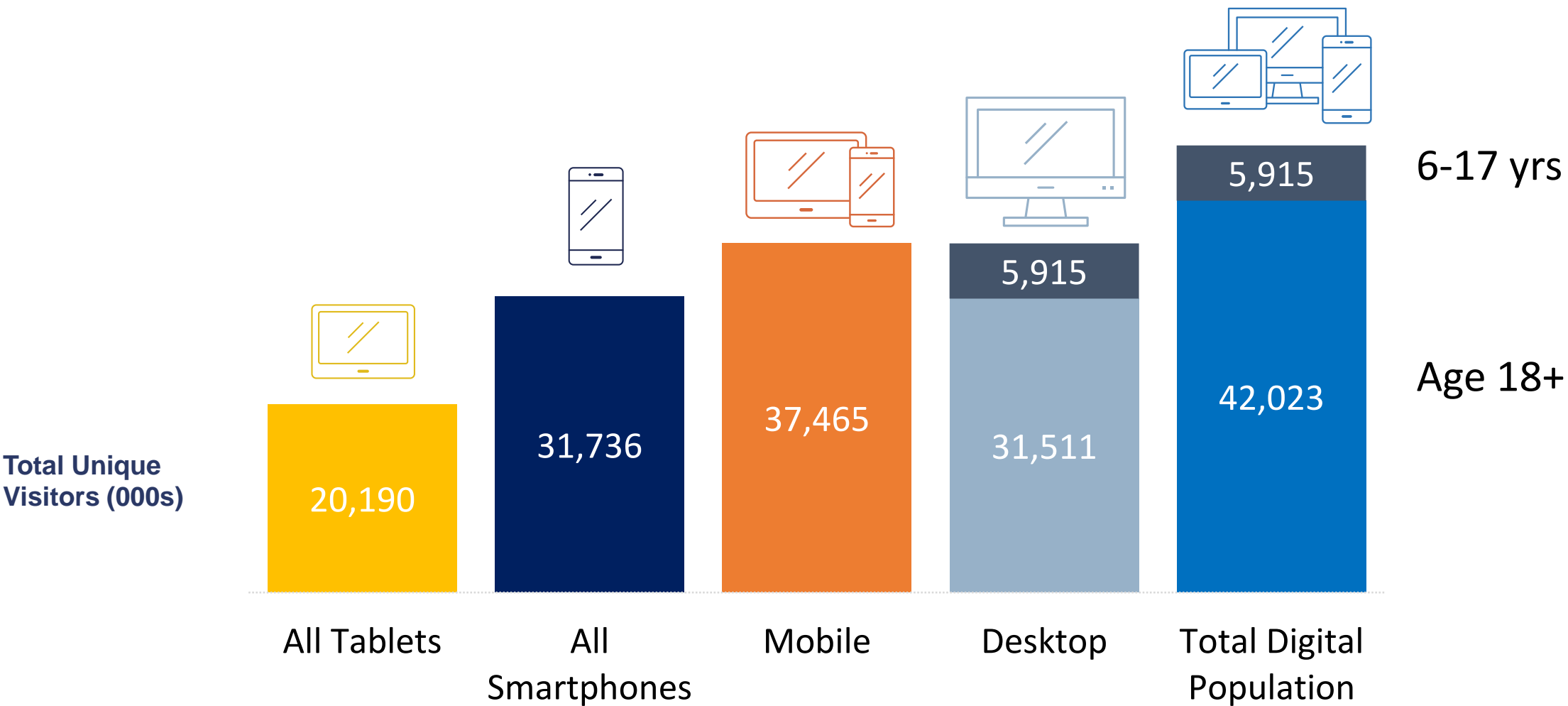
A major UK change is that UKOM has updated the source for UK online universe estimates for all the comScore products that it endorses from the previous National Readership Survey (NRS) to the new Audience Measurement for Publishers (AMP) study, which is run for PAMCO by Ipsos MORI. In order to take into account device fragmentation and changes in consumer cross-platform online access at home and at work, the AMP study contains additional questions of a more granular nature. These enhance the accuracy of differentiation between home and work online access, better identify solus device users and reduce the overlap between pc and mobile penetration.

Data from the new AMP enumeration survey generates different universe sizes from the previous NRS survey data for total UK digital population, desktop (home and work) population and total mobile (smartphone and tablet) population. This leads to a slight increase in the mobile universe and a more significant reduction in the desktop PC user base – especially solus at work PC use. The net result is a c.2.8m drop in total digital population and an increase in solus mobile use from 4 to 10 million.



Usage by Platform

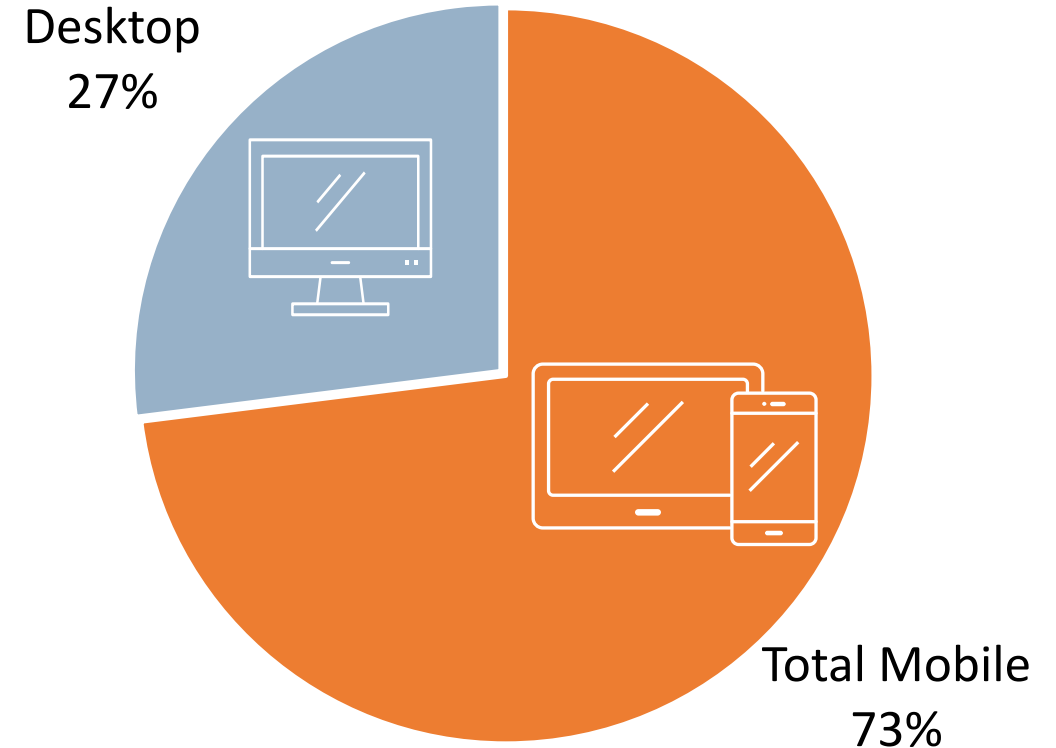
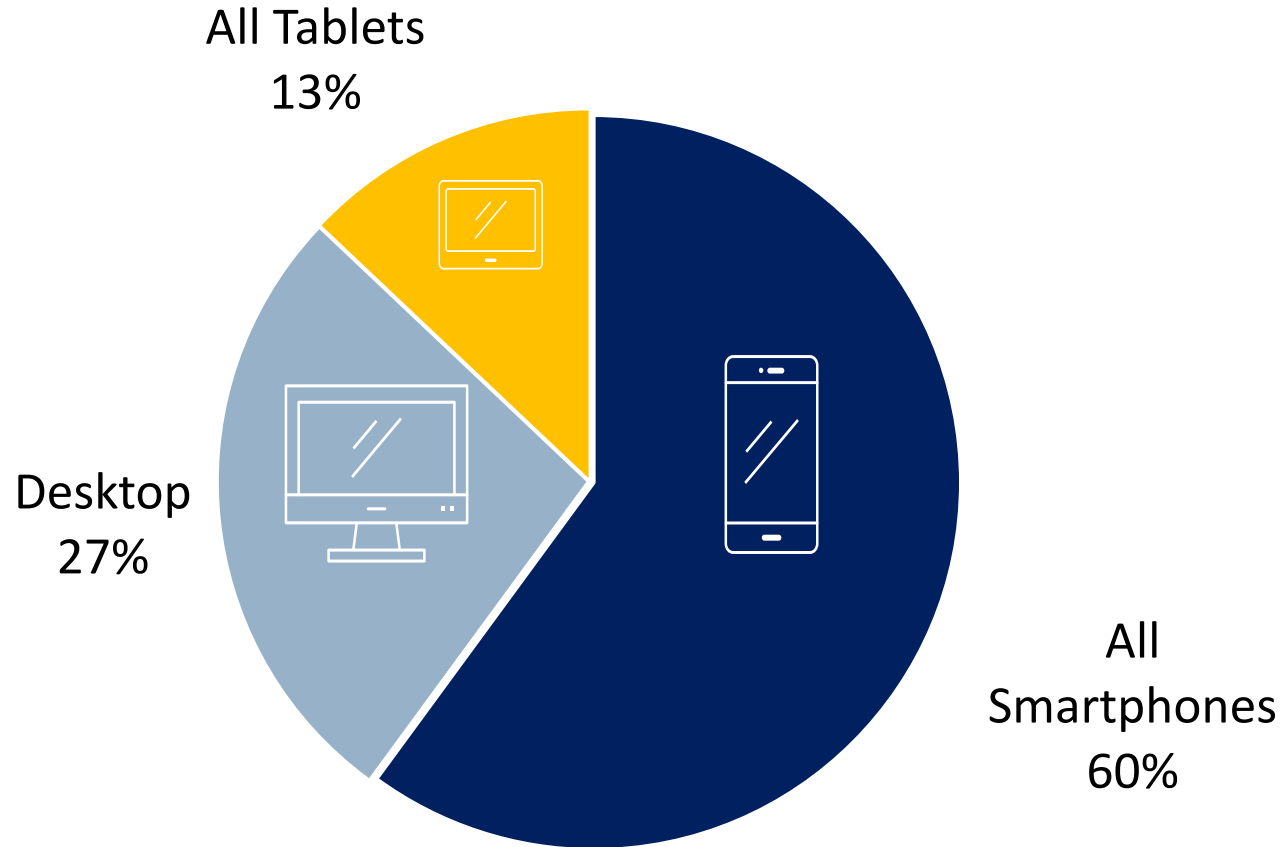
Breakdown of Digital Unique Visitors by Platform



Share of Minutes by Platform

Smartphones now account for **60%** of all adult online minutes

Share of Total Minutes 18+



Source: comScore MMX Multi-Platform, Dec 2017, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

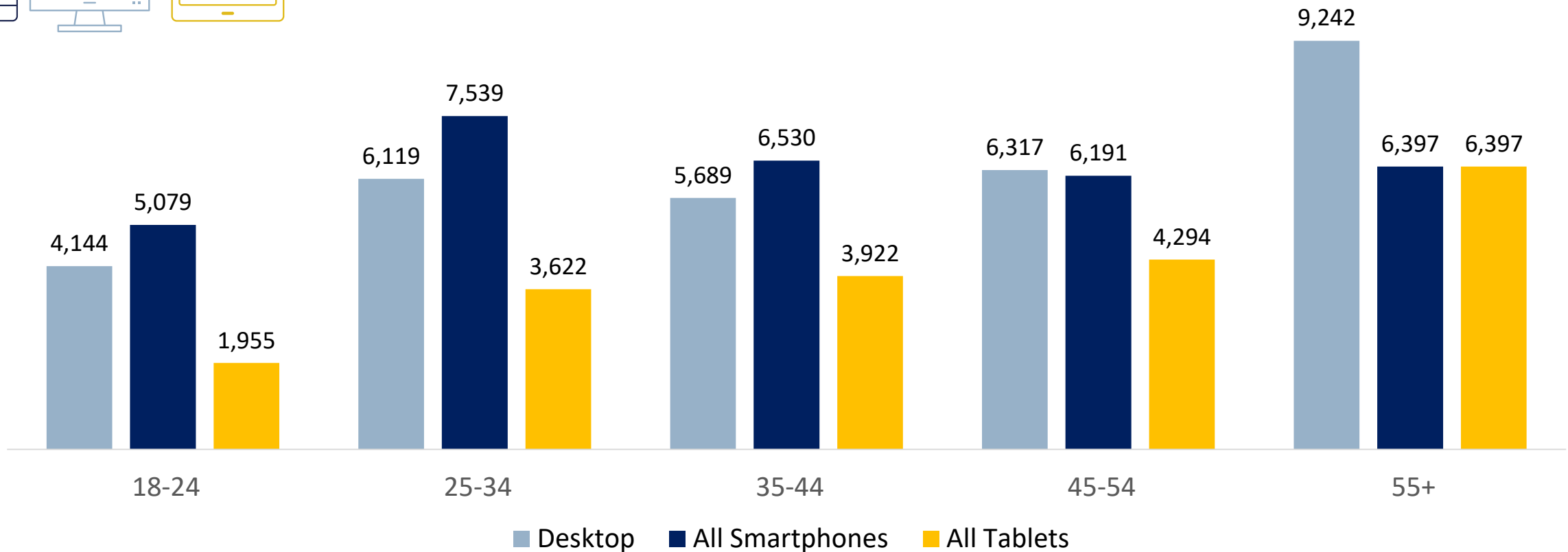
*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Platform Unique Visitors by Age

The Desktop has higher reach amongst Older Audiences

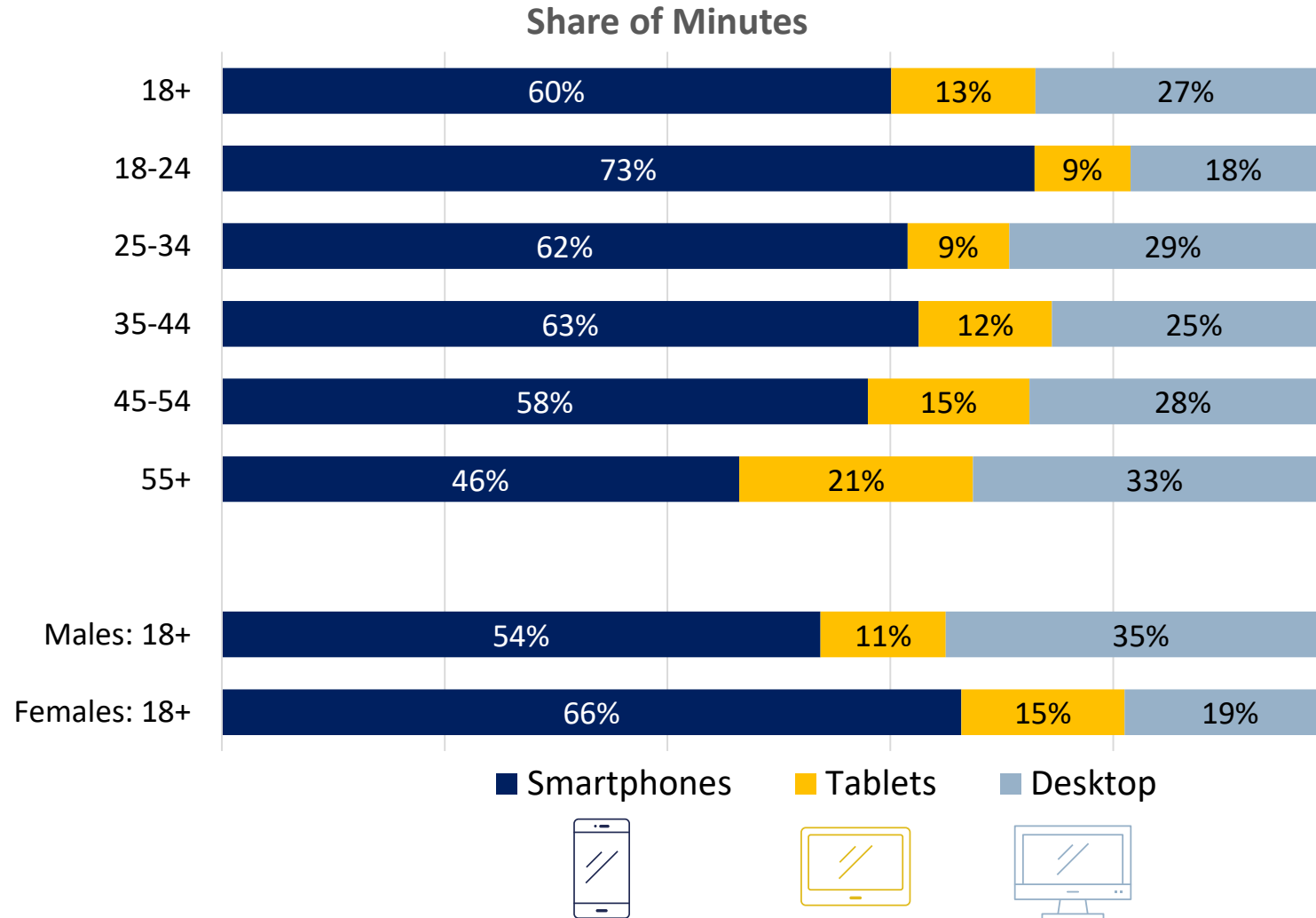


Audience by Platform by Age - Unique Visitors (000s)



Platform Share of Minutes by Age & Gender

Millennials & females spend greatest share of time on mobile devices

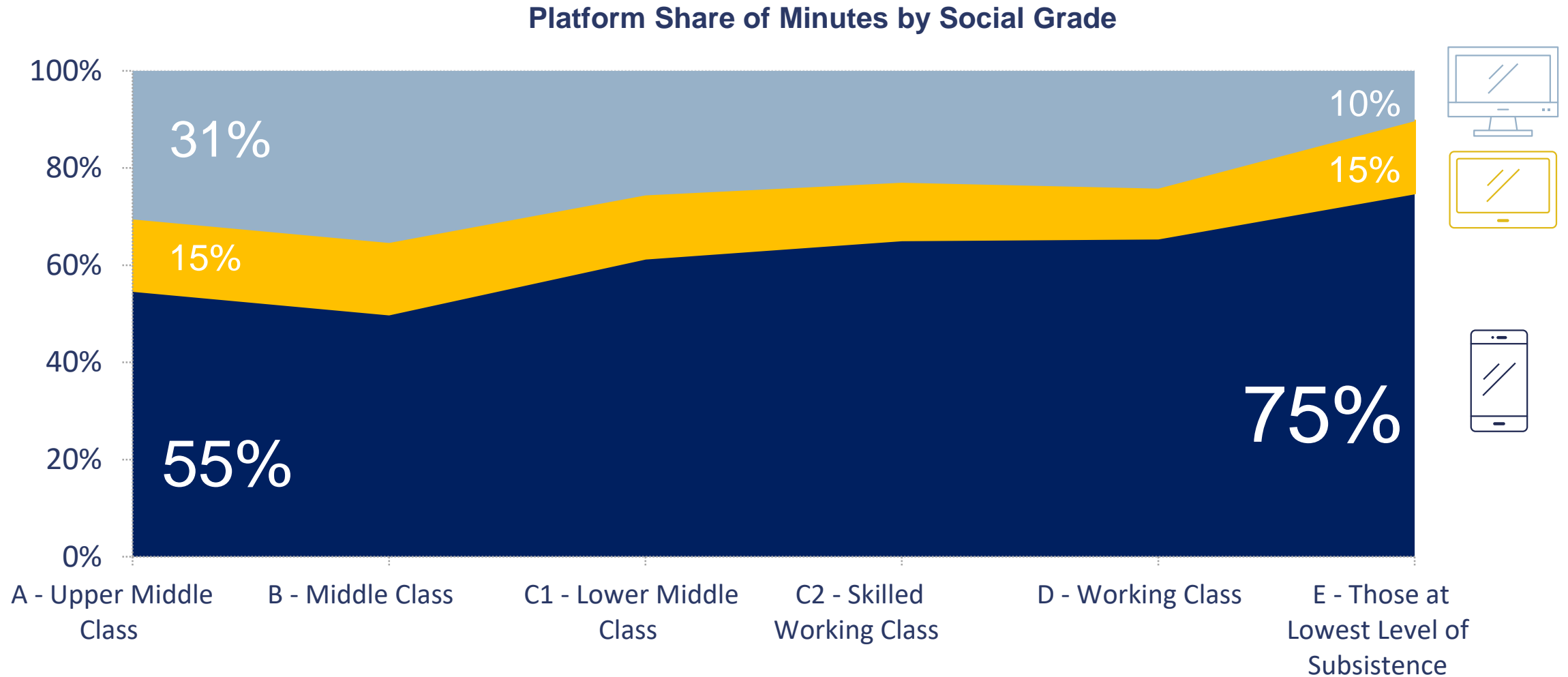


Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 81% of their time online on mobile devices compared to only 65% for males.

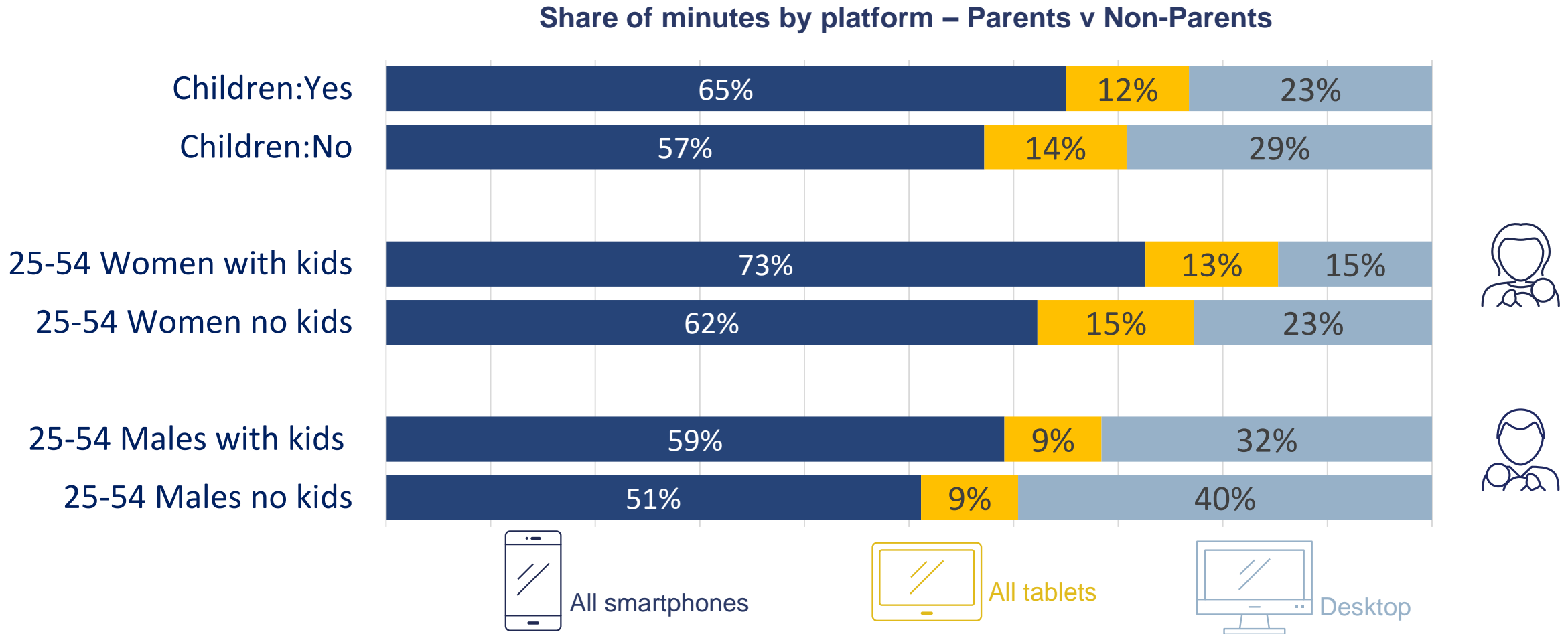
Platform Share of Time Online by Social Grade

Smartphone share increases with decreasing social grade



Platform Share of Time by Presence of Kids

Parents* spend a greater share of their time on mobile devices



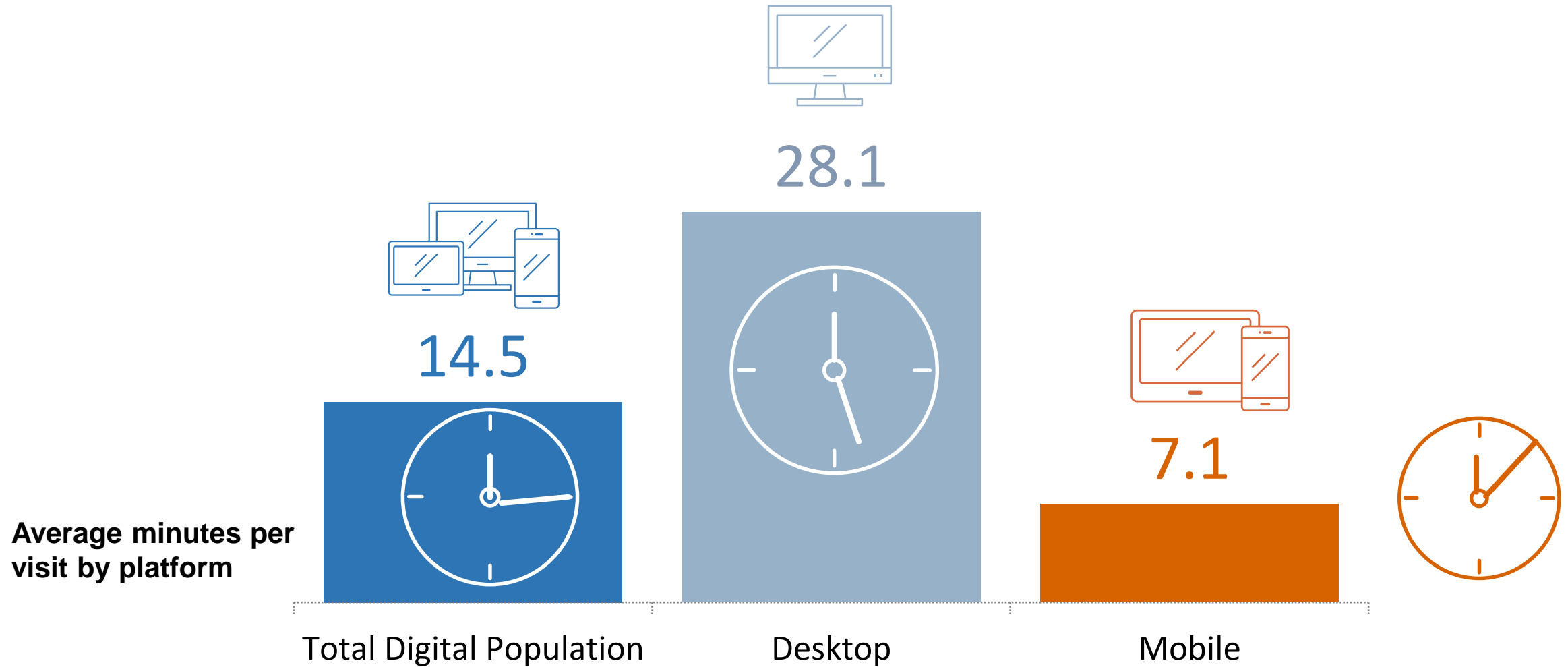
Source: comScore MMX Multi-Platform, Dec 2017, UK

MMX Multi-Platform includes Desktop browsing, Desktop video streams, smartphone browsing & apps, tablet browsing & apps for tagged sites & apps.

* 'Kids in household' used as a proxy for 'Parents'/'

Average Minutes per Visit by Platform

Mobile visits are **shorter**

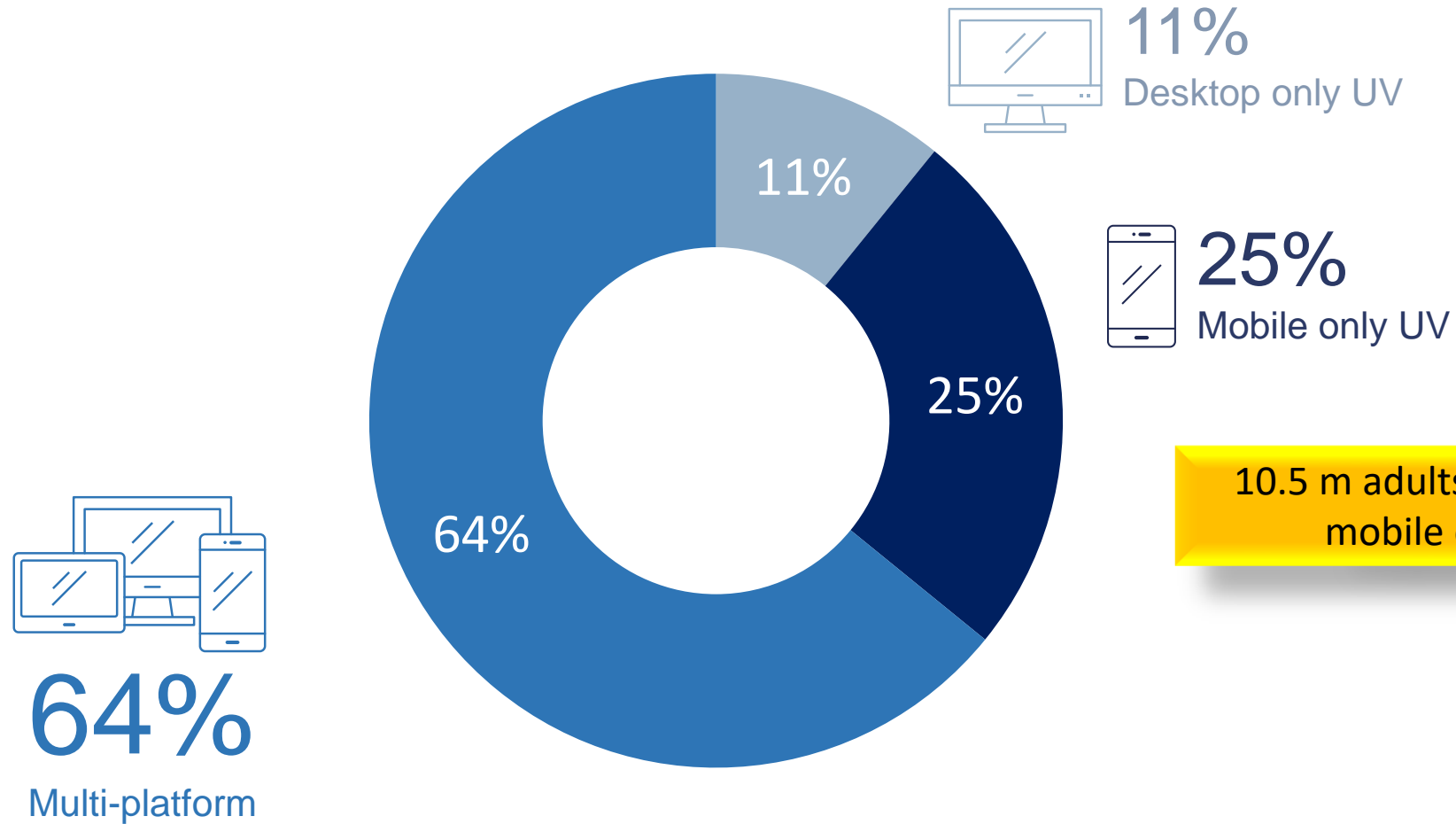




Multi-Platform Usage

Multi-Platform Usage

2/3 of online adults use both a Mobile device and a PC to go online

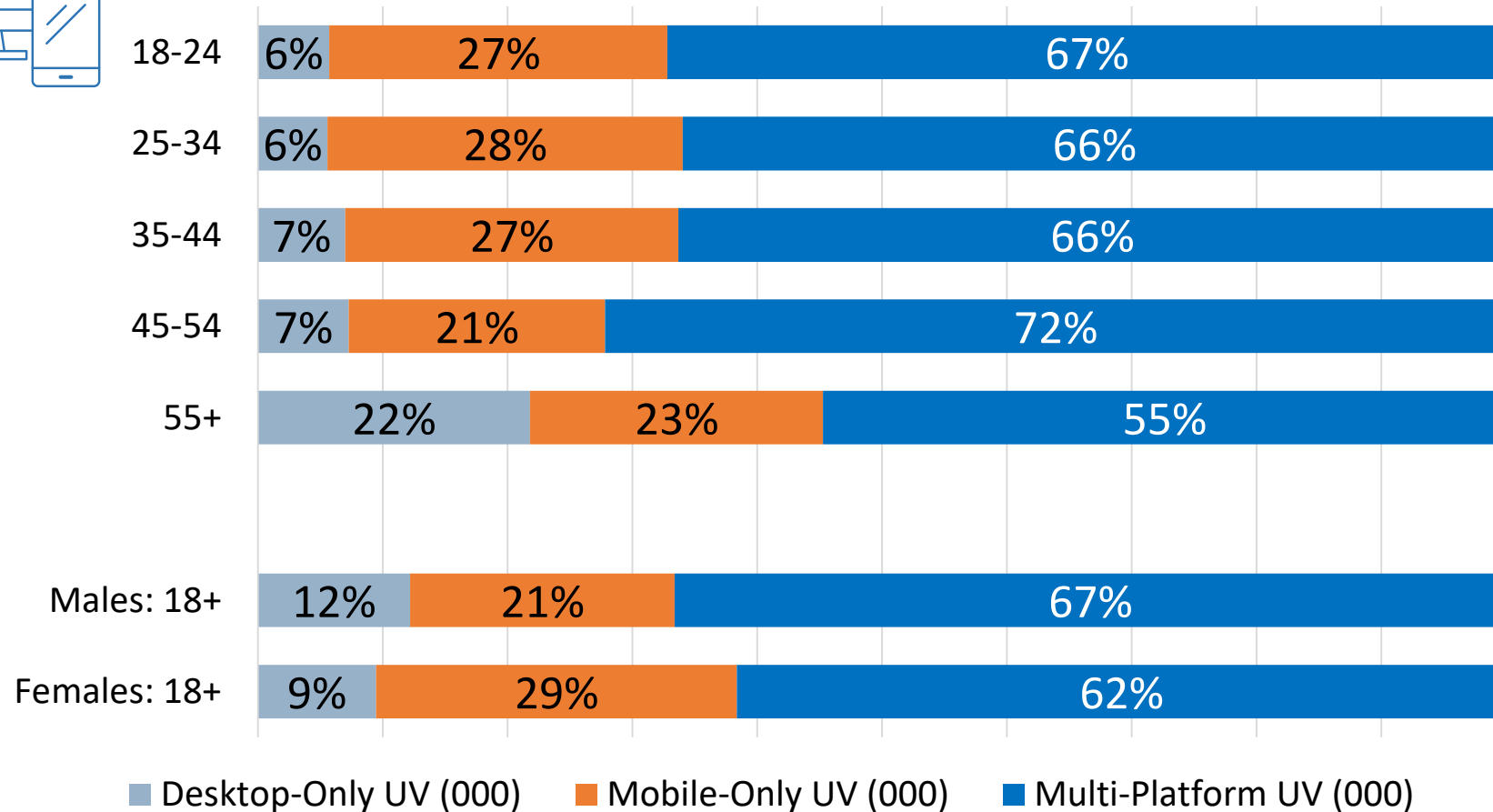


Multi-Platform usage by age and gender

55+ are least likely to be Multi-Platform



Unique Viewers by Platform by Age & Gender



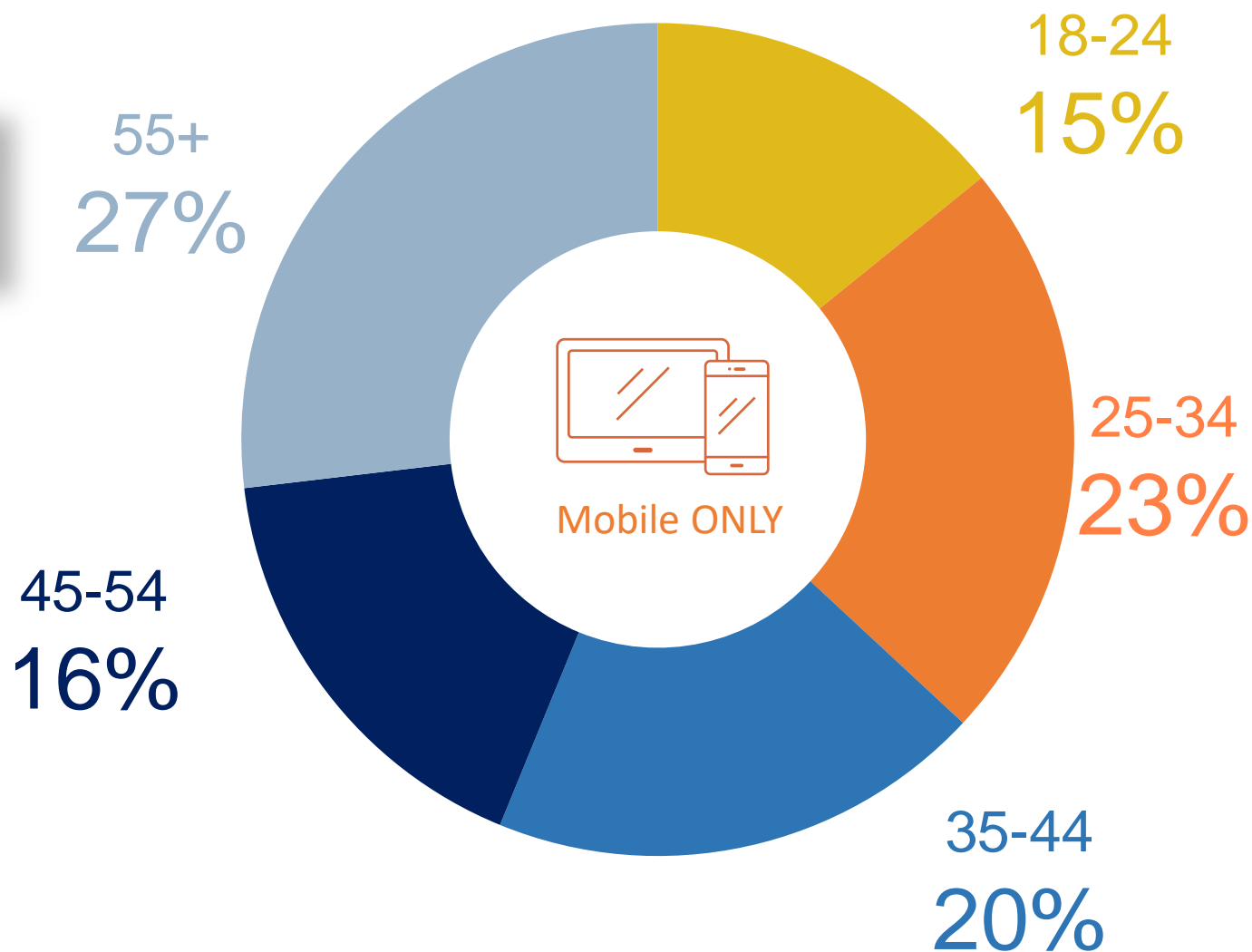
Only 55% of 55+ are Multi-Platform

Females are more likely to be 'Mobile Only'

Mobile Only Audience Unique Visitors by Age

The 'mobile only' audience is split across **all age ranges**

Tablets drive up 55+ share
of the Mobile Online
Audience





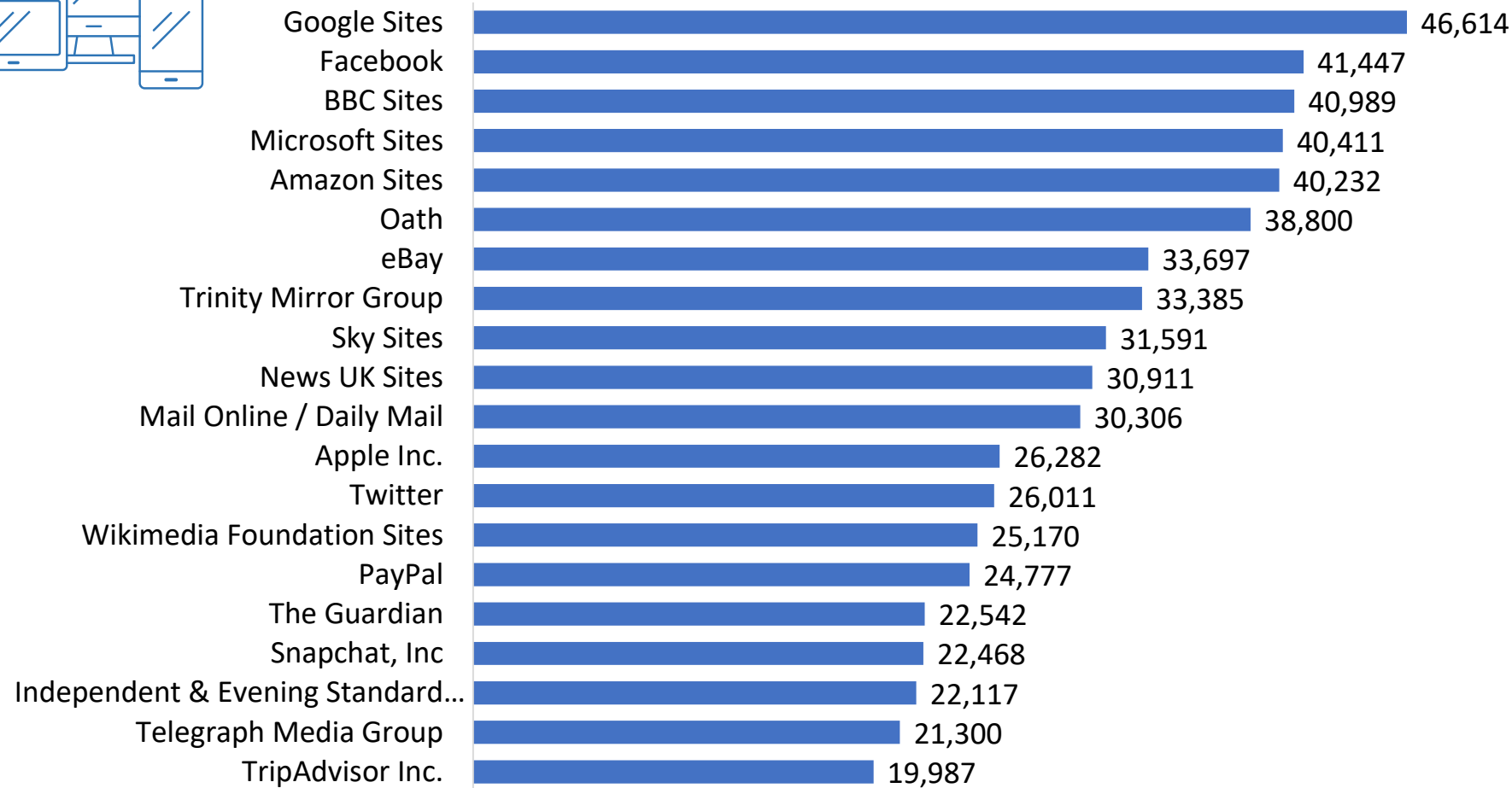
Top Properties: Total Digital Population

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

Google reaches 97% of the UK Online population



Total Unique Visitors/Viewers (000s) = 47,938

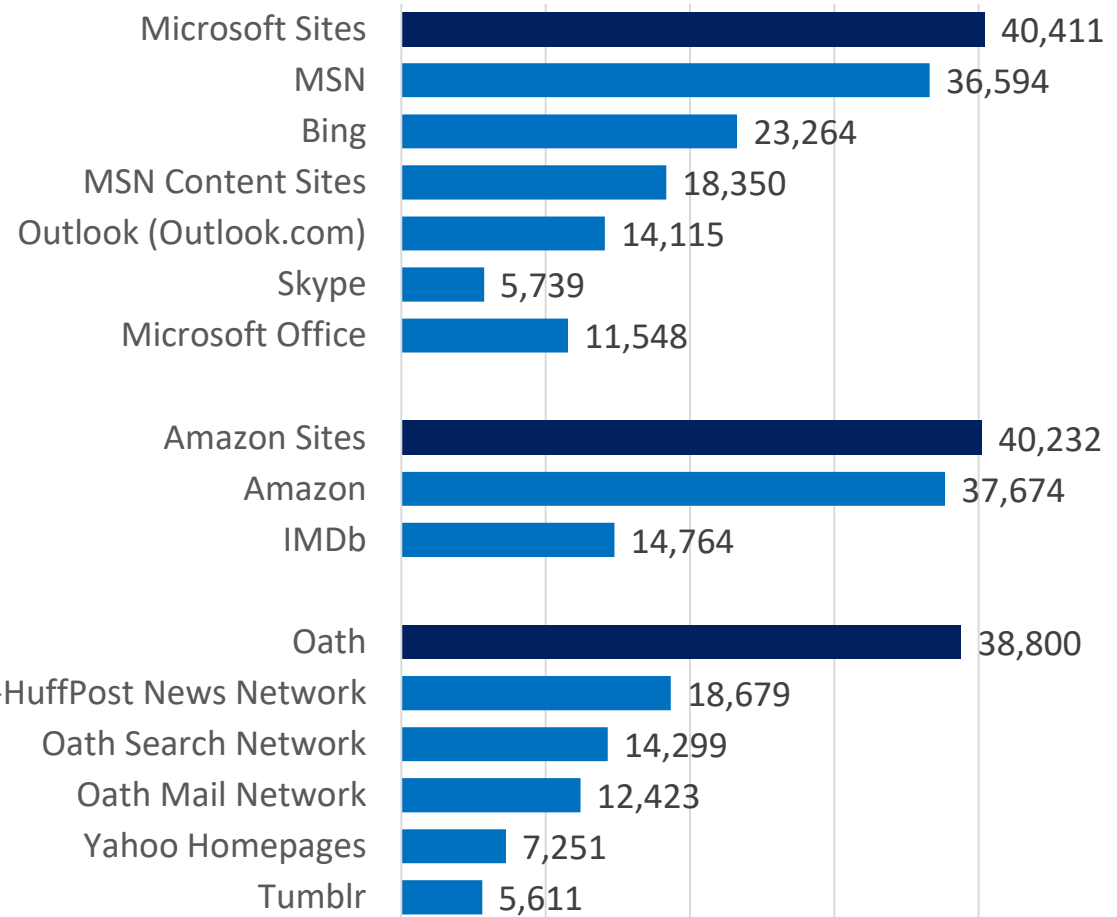
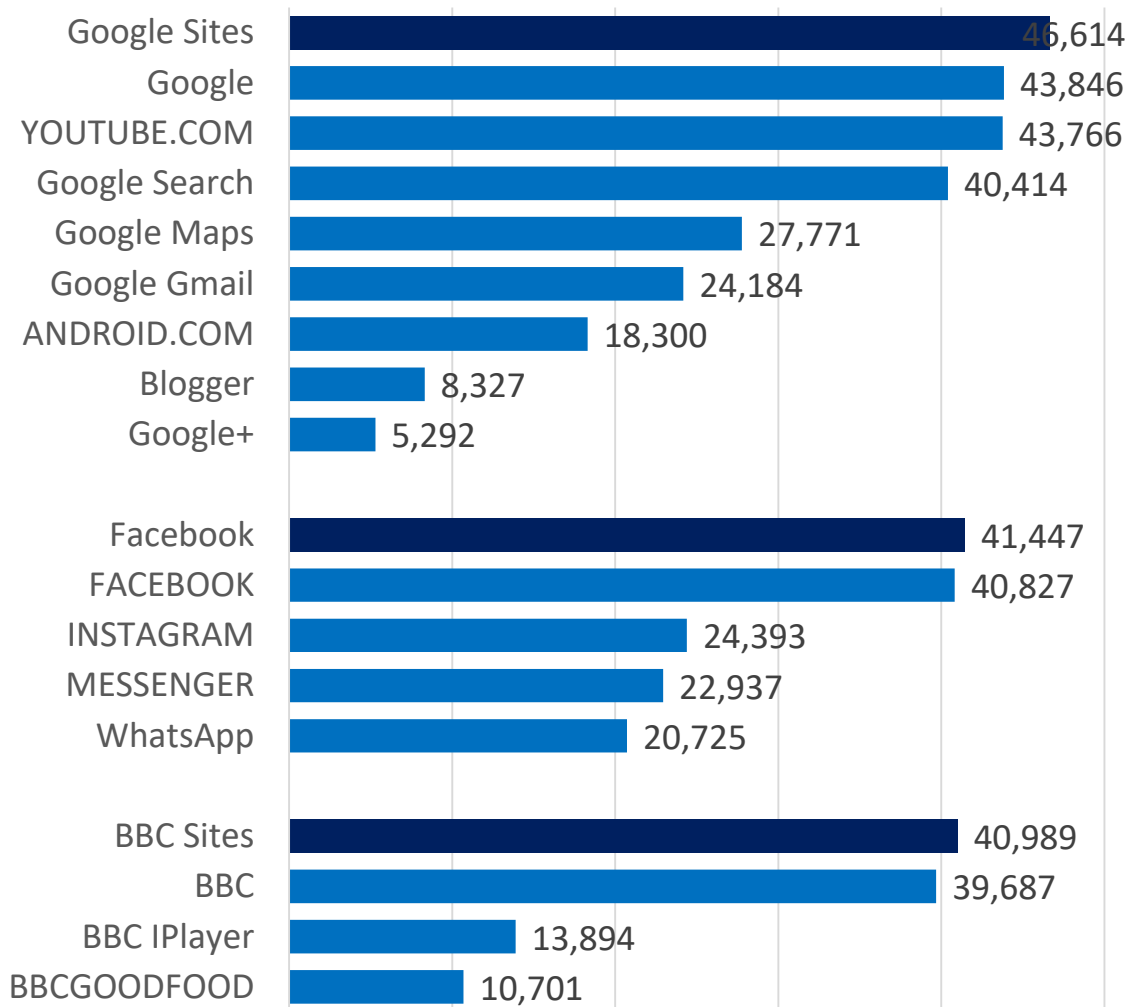


The top 6 properties all have online reach over 80%

Oath, has an audience of nearly 39 million. Adding Microsoft Display advertising products (Outlook/Skype and MSN) gives the Oath/MS partnership a total audience reach of 43.6m (91% reach), making them 2nd only to Google

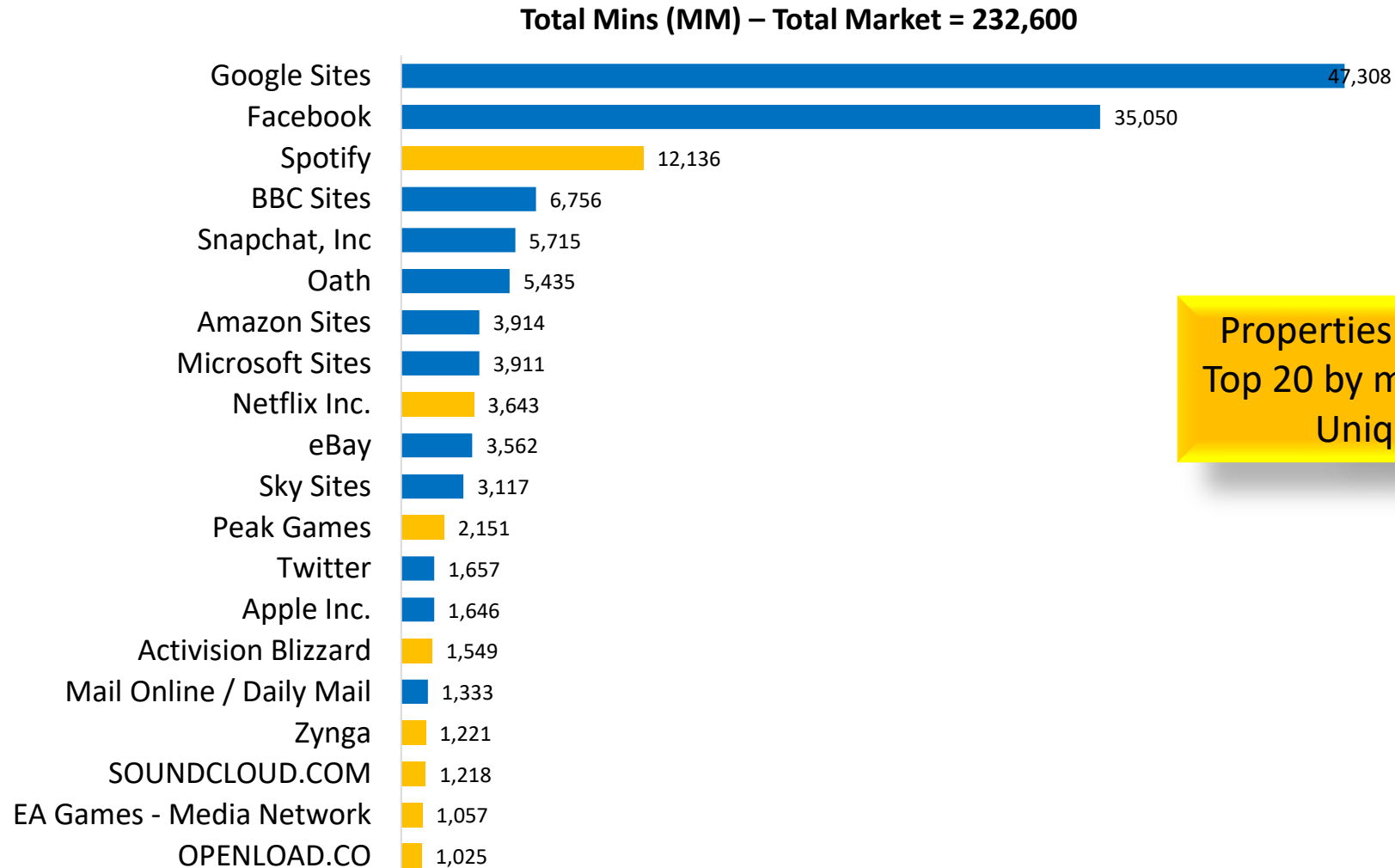
Audience Breakdown of Top 6 Sites

YouTube alone reaches more than all Facebook properties combined



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

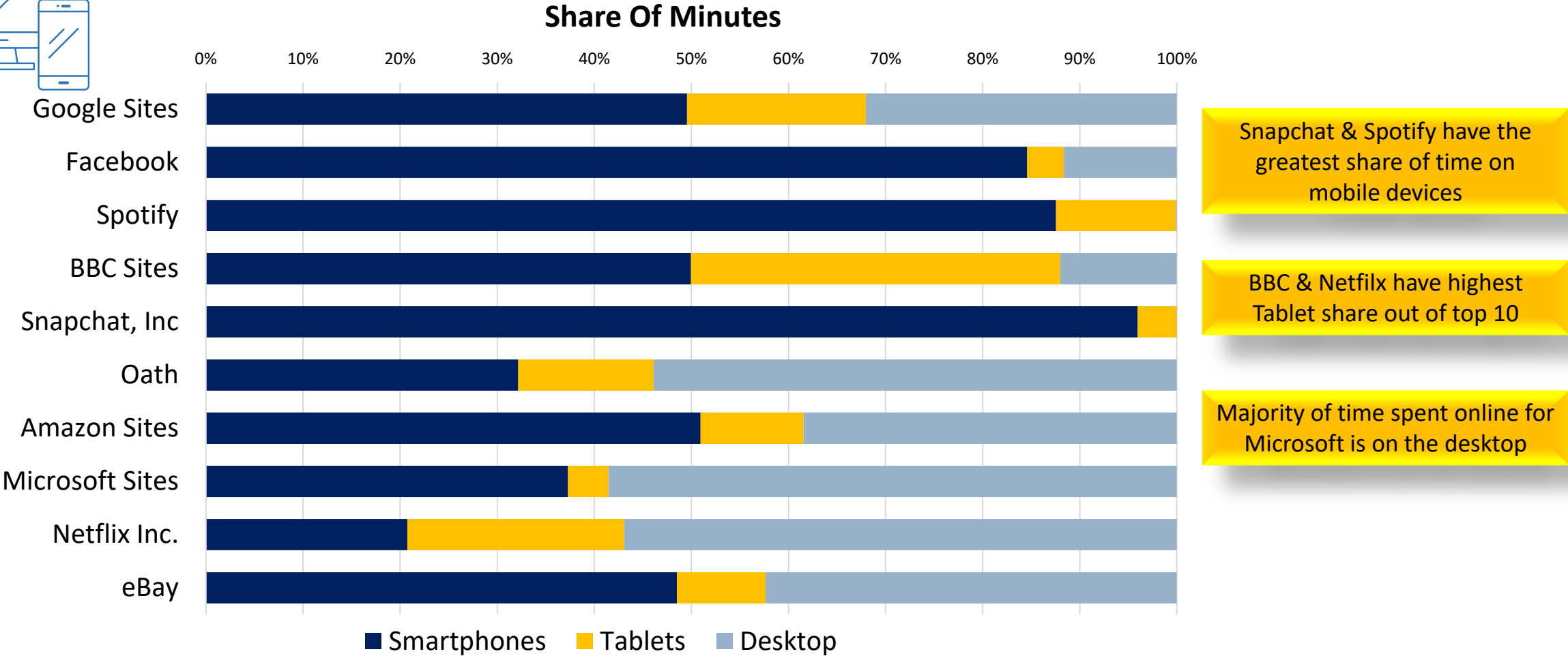
Entertainment (games/music/TV) & social media sites drive minutes



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

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

Mobile devices account for over 90% of time spent on Spotify & Snapchat





Mobile usage

Mobile Reach by Platform & Access

82% of the UK online adult population use mobile apps



Total Mobile Reach

Mobile App Reach



Smartphone Reach

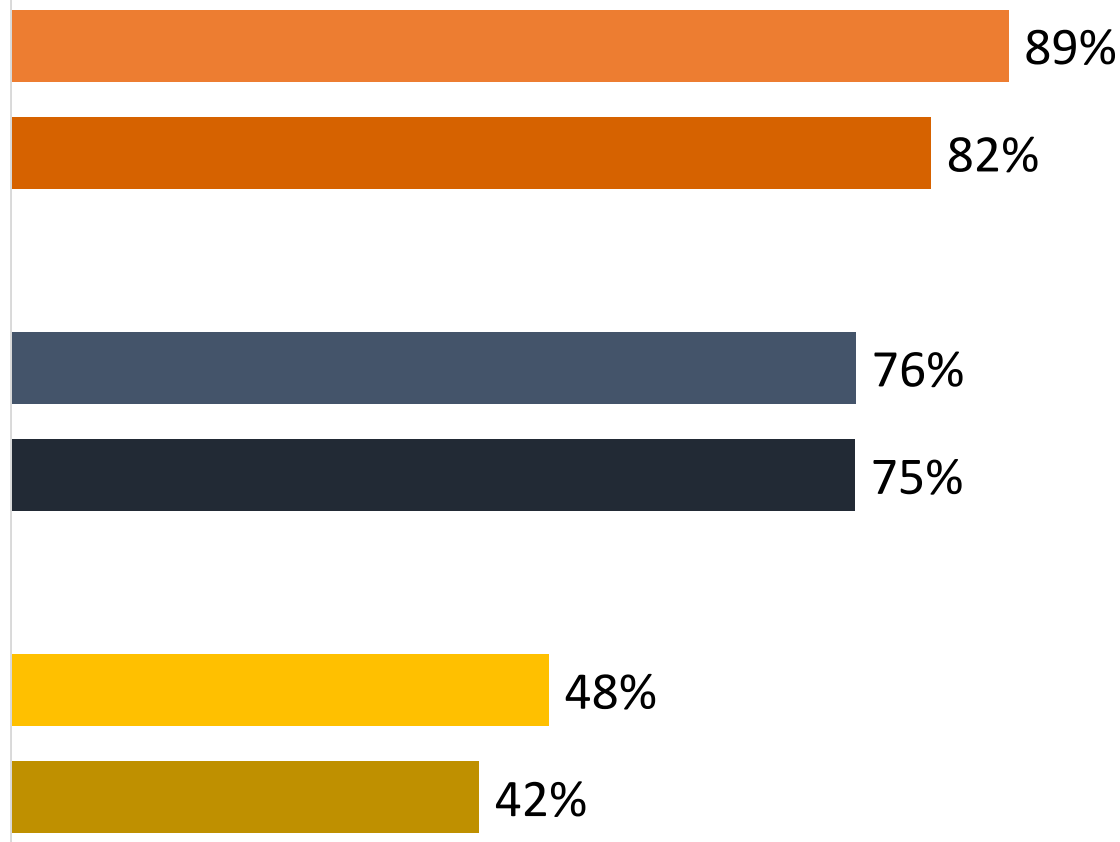
Smartphone App Reach



Tablet Reach

Tablet App Reach

Reach of Online UK Population – Dec 2017



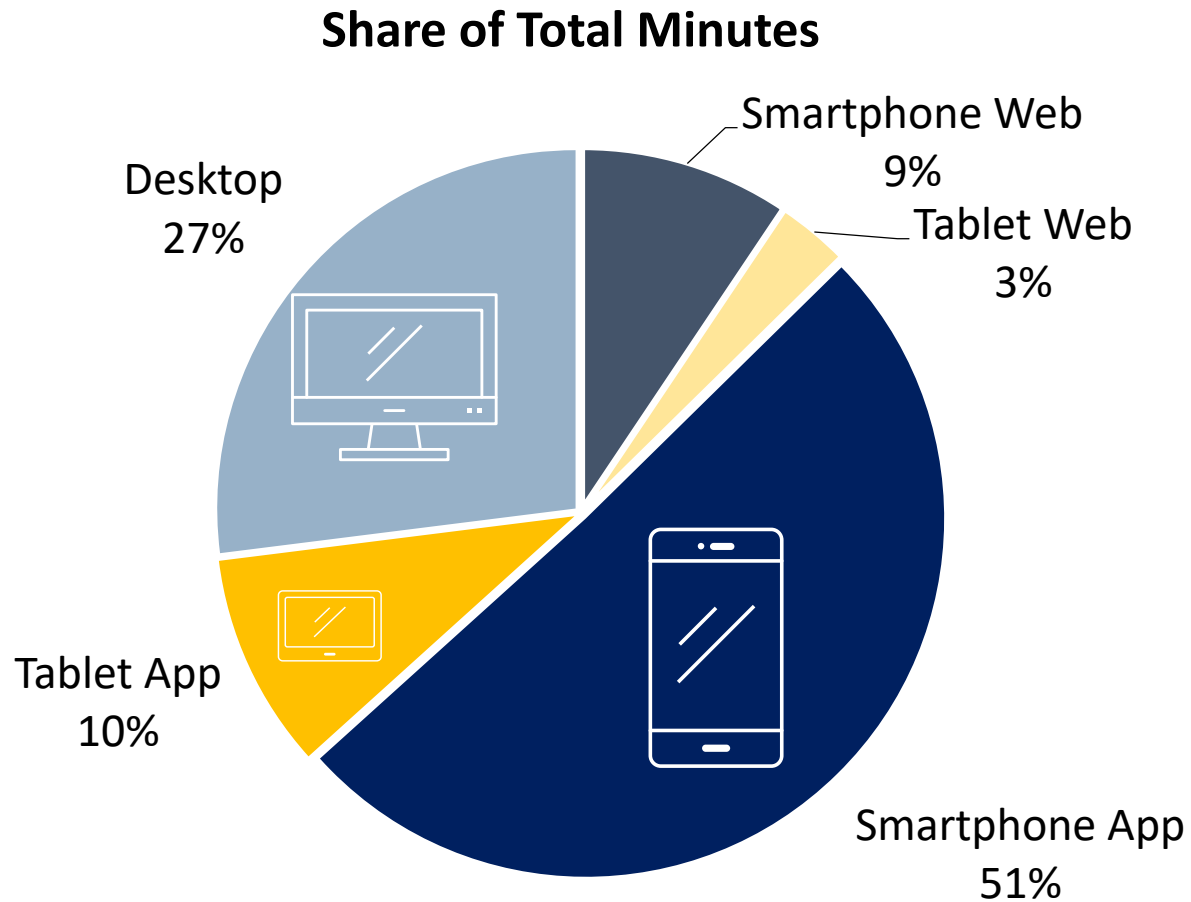
Source: comScore MMX Multi-Platform, Dec 2017, UK, Adults 18+

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

Share of Minutes by Platform & Mobile Access

Mobile Apps account for 61% of all Minutes



Mobile Apps account for
61% of ALL minutes &
83% of MOBILE
minutes



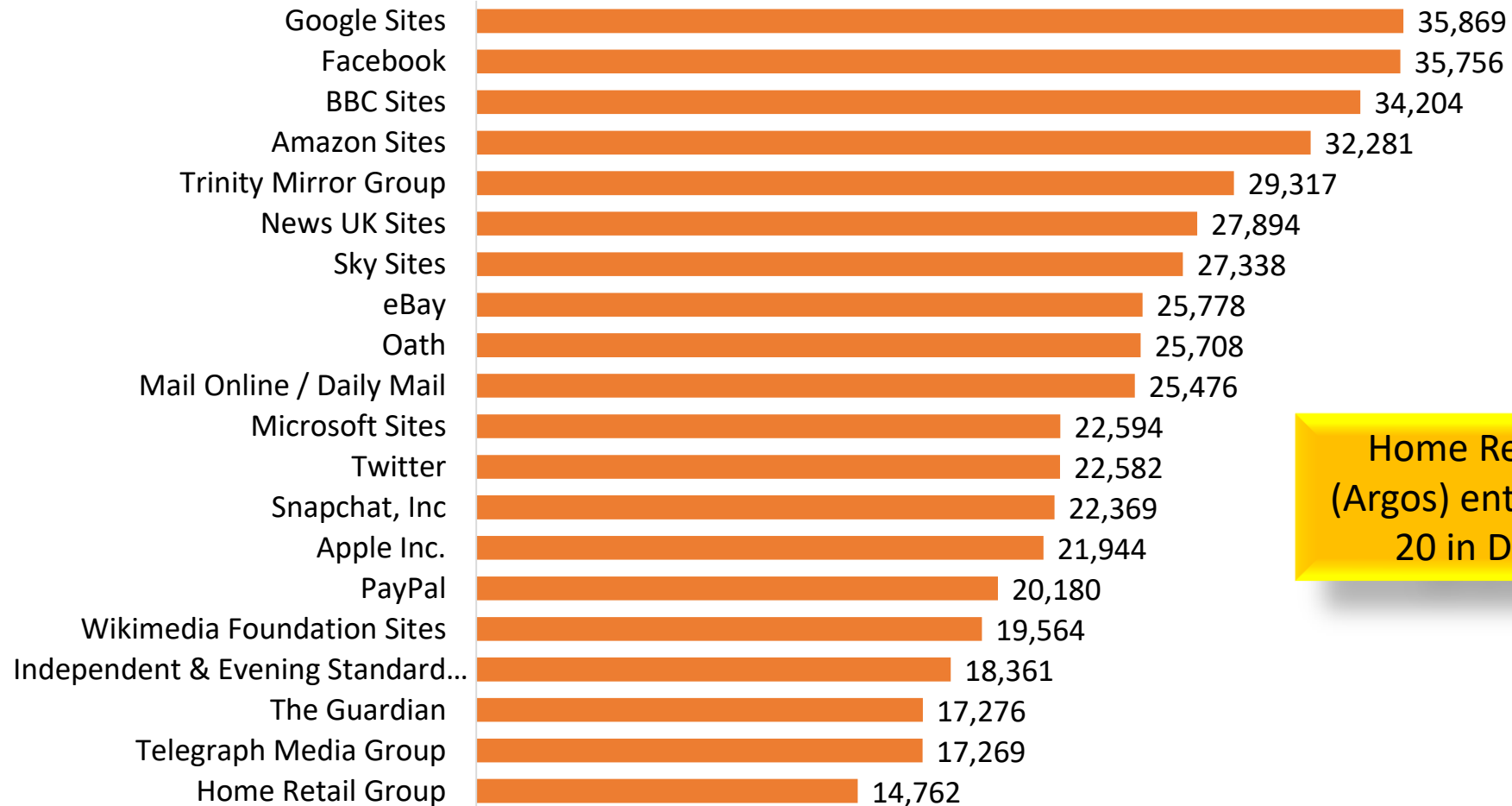
Top Properties: Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

37m adults accessed mobile content in Dec 2017 (via browser and app)



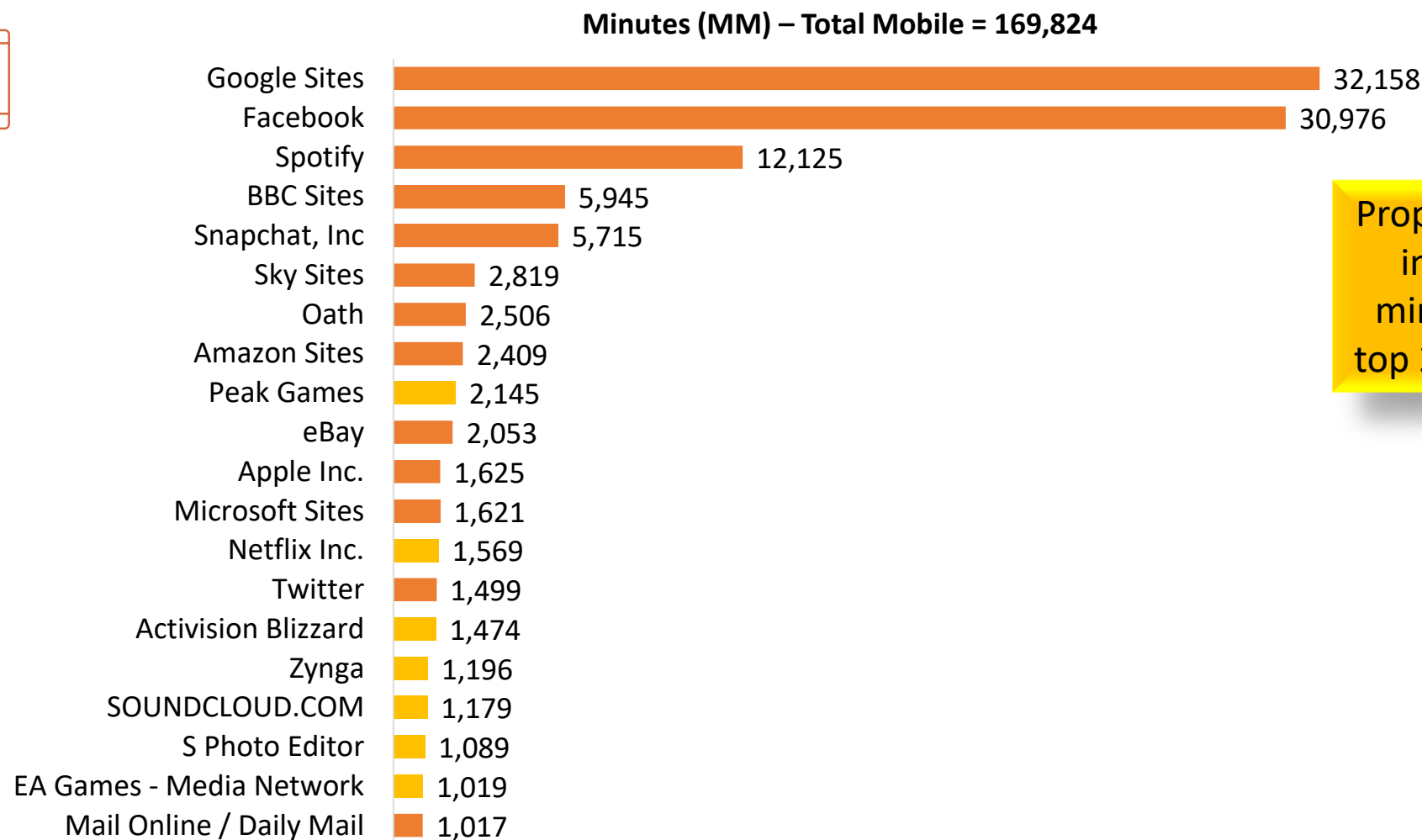
Total Unique Visitors/Viewers (000s) – Total Mobile (18+) = 37,465



Home Retail Group
(Argos) entered the top
20 in December

Top 20 Mobile Properties ranked by minutes

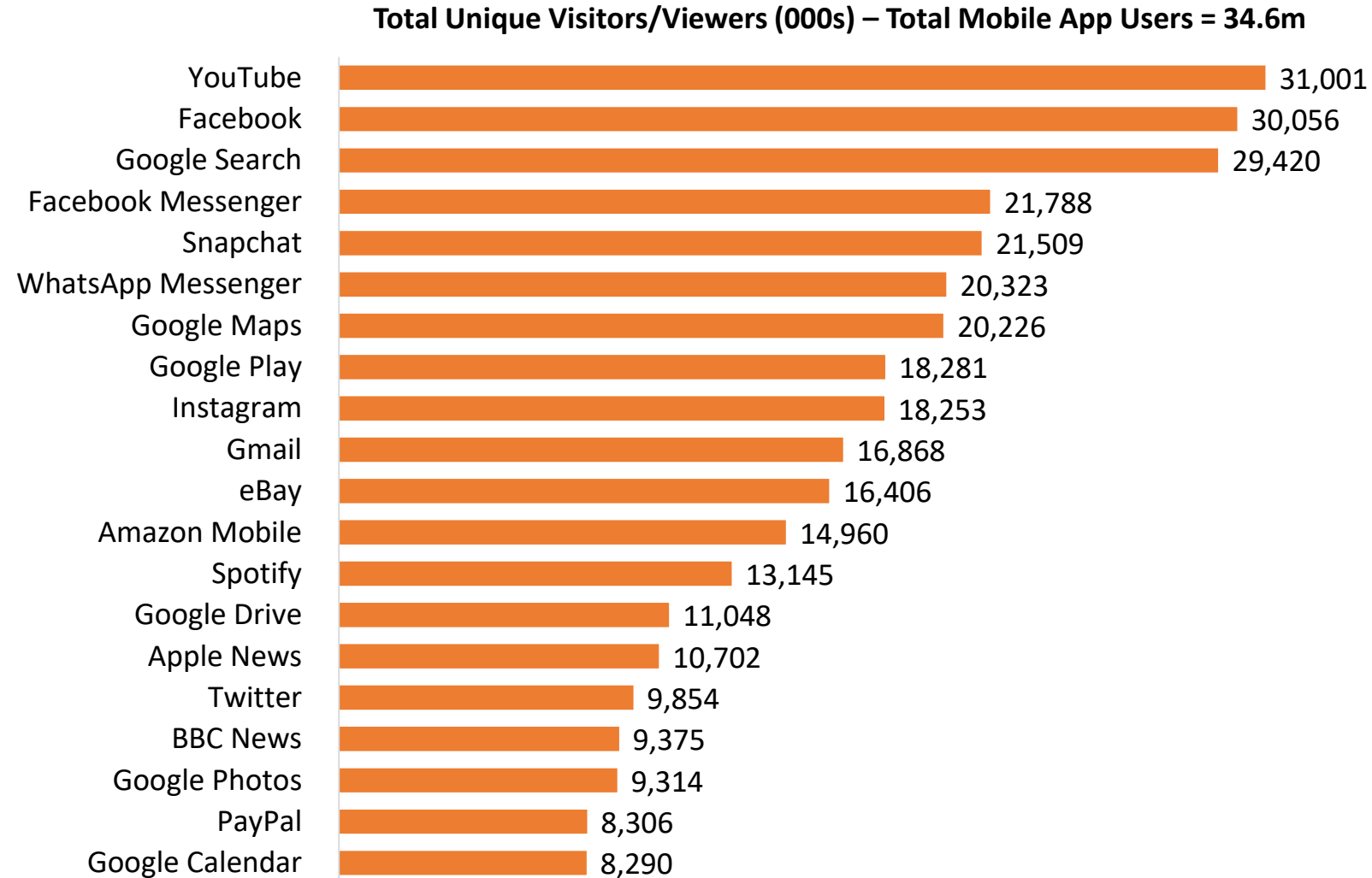
Entertainment & Games sites more likely to feature in 'time online' top 20



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

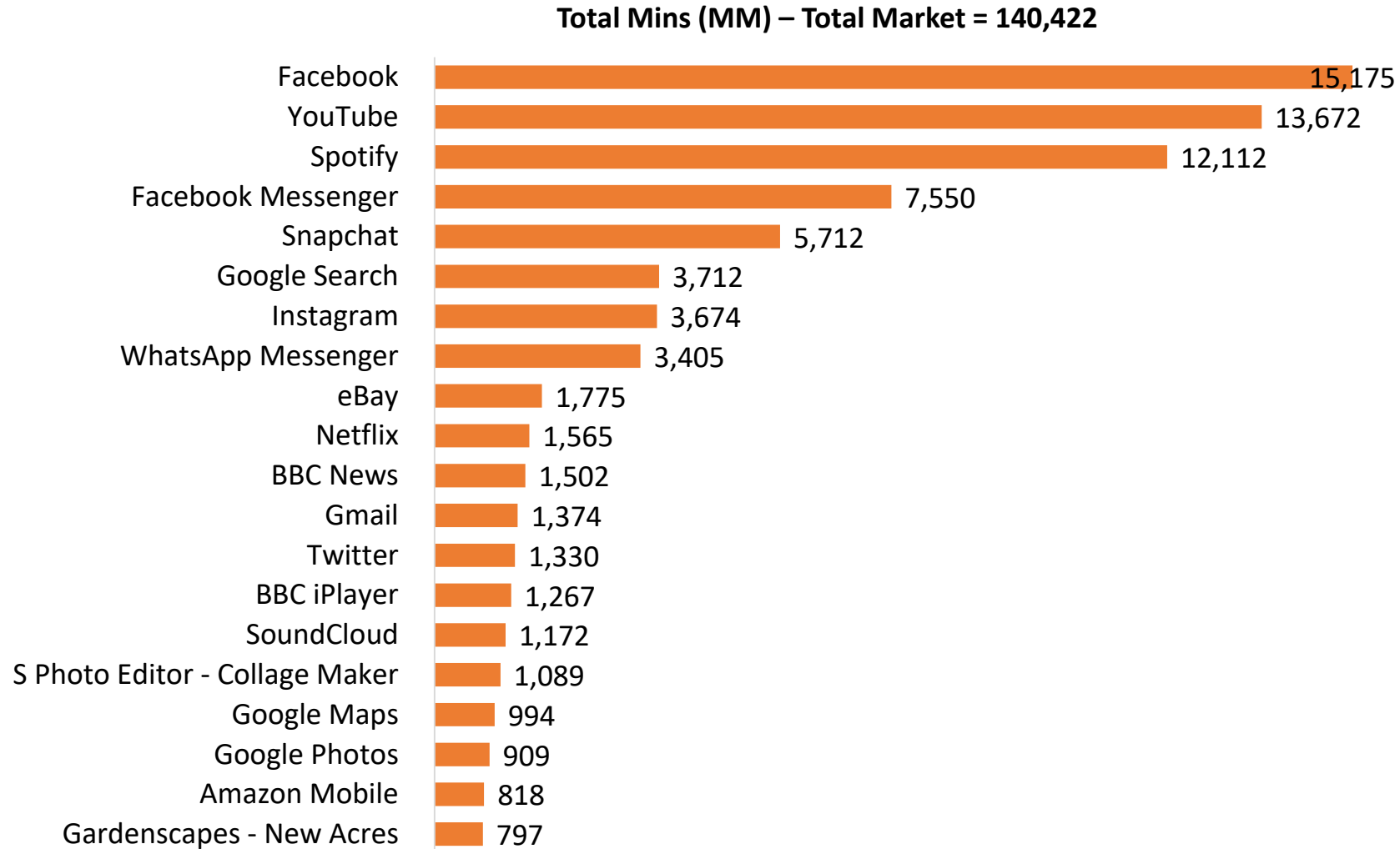
Top 20 Mobile Apps (Tablet & Smartphone) ranked by Unique Visitors

Global Brands dominate top 20 Apps



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

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



Top 10 Mobile Apps by Unique Visitors split by Platform

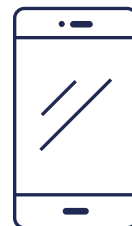
9 of the top 10 apps are owned by Google or Facebook

Total Mobile Top 10



| | (Million) |
|----------------------|-----------|
| • YouTube | 31.0 |
| • Facebook | 30.1 |
| • Google Search | 29.4 |
| • Facebook Messenger | 21.8 |
| • Snapchat | 21.5 |
| • WhatsApp Messenger | 20.3 |
| • Google Maps | 20.2 |
| • Google Play | 18.3 |
| • Instagram | 18.3 |
| • Gmail | 16.9 |

Smartphone Top 10



| | (Million) |
|----------------------|-----------|
| • YouTube | 26.7 |
| • Google Search | 25.8 |
| • Facebook | 25.8 |
| • Facebook Messenger | 20.4 |
| • WhatsApp Messenger | 20.1 |
| • Google Maps | 18.7 |
| • Google Play | 18.3 |
| • Snapchat | 16.4 |
| • Instagram | 15.7 |
| • Gmail | 15.6 |

Tablet Top 10

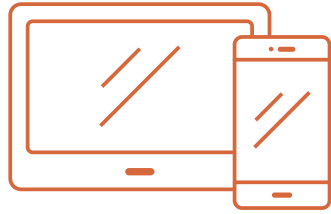


| | (Million) |
|-----------------|-----------|
| • YouTube | 7.4 |
| • Snapchat | 7.2 |
| • Facebook | 7.0 |
| • Google Search | 5.8 |
| • BBC iPlayer | 3.9 |
| • Instagram | 3.6 |
| • eBay | 2.9 |
| • BBC News | 2.9 |
| • Spotify | 2.8 |
| • Amazon Mobile | 2.4 |

Top 10 Mobile Apps by Minutes by Mobile Platform

Spotify & Netflix enter the top 10 for Minutes

Total Mobile Top 10



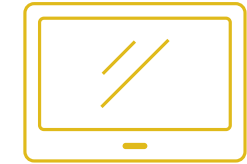
| | Billion |
|----------------------|---------|
| • Facebook | 15.2 |
| • YouTube | 13.7 |
| • Spotify | 12.1 |
| • Facebook Messenger | 7.6 |
| • Snapchat | 5.7 |
| • Google Search | 3.7 |
| • Instagram | 3.7 |
| • WhatsApp Messenger | 3.4 |
| • eBay | 1.8 |
| • Netflix | 1.6 |

Smartphone Top 10



| | Billion |
|----------------------|---------|
| • Facebook | 14.2 |
| • Spotify | 10.6 |
| • YouTube | 9.5 |
| • Facebook Messenger | 7.5 |
| • Snapchat | 5.5 |
| • Instagram | 3.6 |
| • WhatsApp Messenger | 3.4 |
| • Google Search | 2.7 |
| • eBay | 1.5 |
| • Twitter | 1.2 |

Tablet Top 10



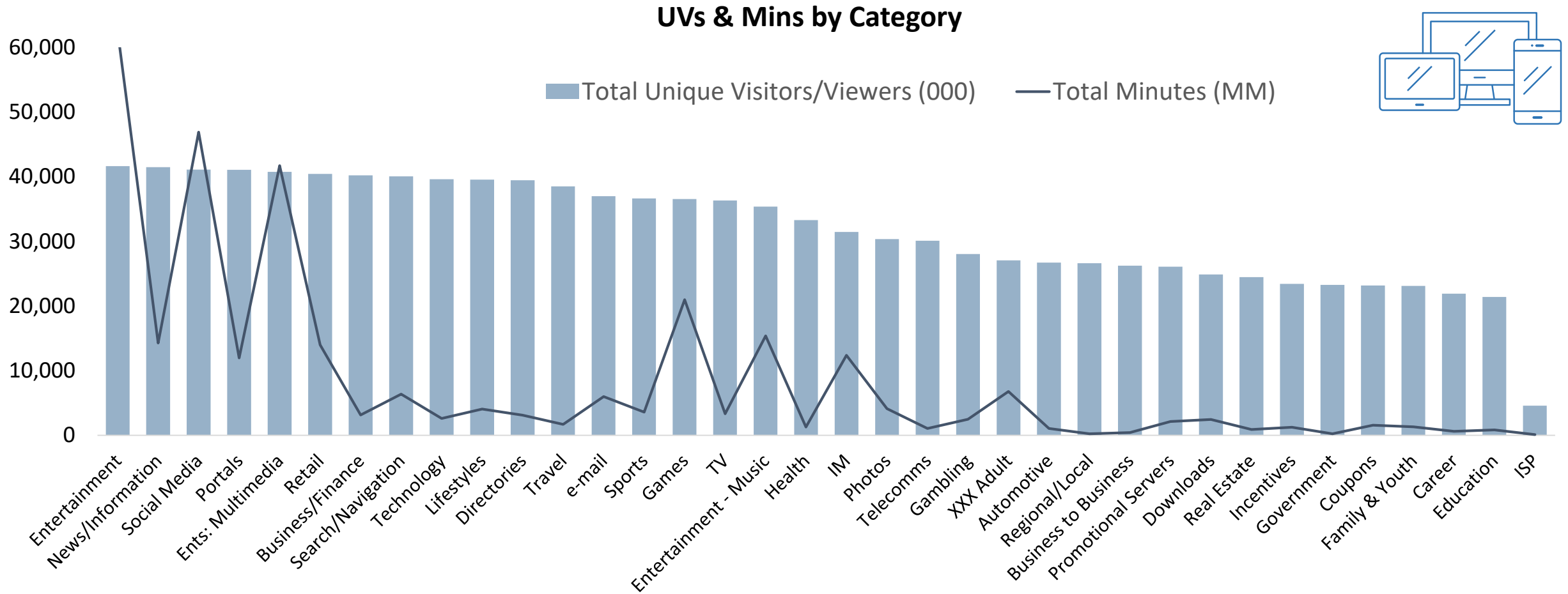
| | Billion |
|-----------------|---------|
| • YouTube | 4.2 |
| • Spotify | 1.5 |
| • Facebook | 1.0 |
| • Google Search | 1.0 |
| • Netflix | 0.8 |
| • BBC iPlayer | 0.8 |
| • Sky Go | 0.5 |
| • BBC News | 0.5 |
| • Swagbucks | 0.4 |
| • YouTube Kids | 0.4 |



Categories

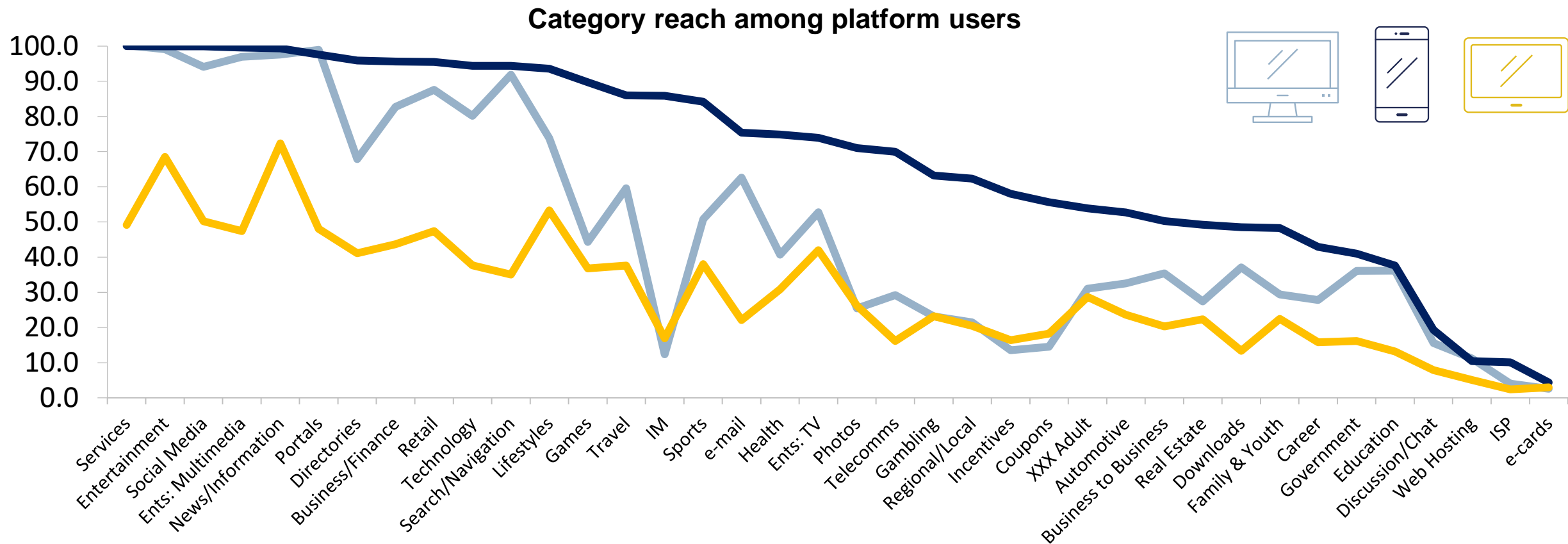
Major Categories Online – Unique Visitors v Minutes

Entertainment, Social Media, IM & Games have high engagement



Category Reach by Platform

Reach is higher on smartphones for nearly all activities



Source: comScore MMX Multi-Platform, Dec 2017, UK Adults 18+

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

Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

27%



Smartphone total

60%



Tablet total

13%

| | |
|------------------------|-----|
| Education | 87% |
| Web Hosting | 85% |
| Retail - Movies | 78% |
| Computer Software | 75% |
| Auctions | 72% |
| Government | 70% |
| Entertainment - Movies | 65% |
| Automotive | 64% |
| Business to Business | 60% |
| e-cards | 60% |

| | |
|-------------------------|-----|
| • Instant Messenger | 98% |
| • Photos | 92% |
| • Retail - Music | 85% |
| • Books | 84% |
| • Social Media | 84% |
| • Entertainment - Music | 82% |
| • Health | 79% |
| • Technology | 75% |
| • Telecommunications | 72% |
| • Lifestyles | 67% |

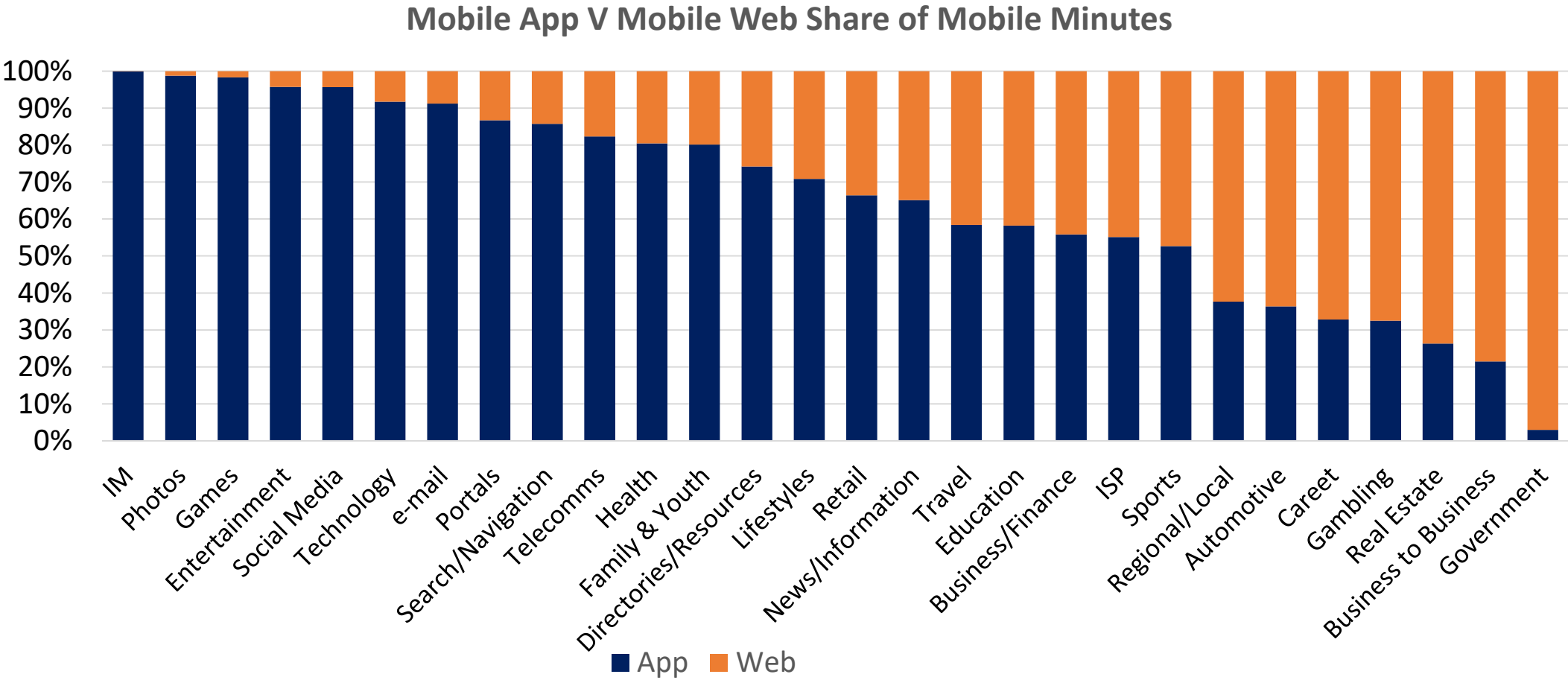
| | |
|--------------------|-----|
| • TV | 40% |
| • Radio | 35% |
| • Coupons | 33% |
| • News/Information | 26% |
| • Family & Youth | 26% |
| • e-cards | 24% |
| • Games | 21% |
| • Real Estate | 19% |
| • Portals | 16% |
| • Entertainment | 16% |

Source: comScore MMX Multi-Platform, Dec 2017, UK, Adults 18+

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



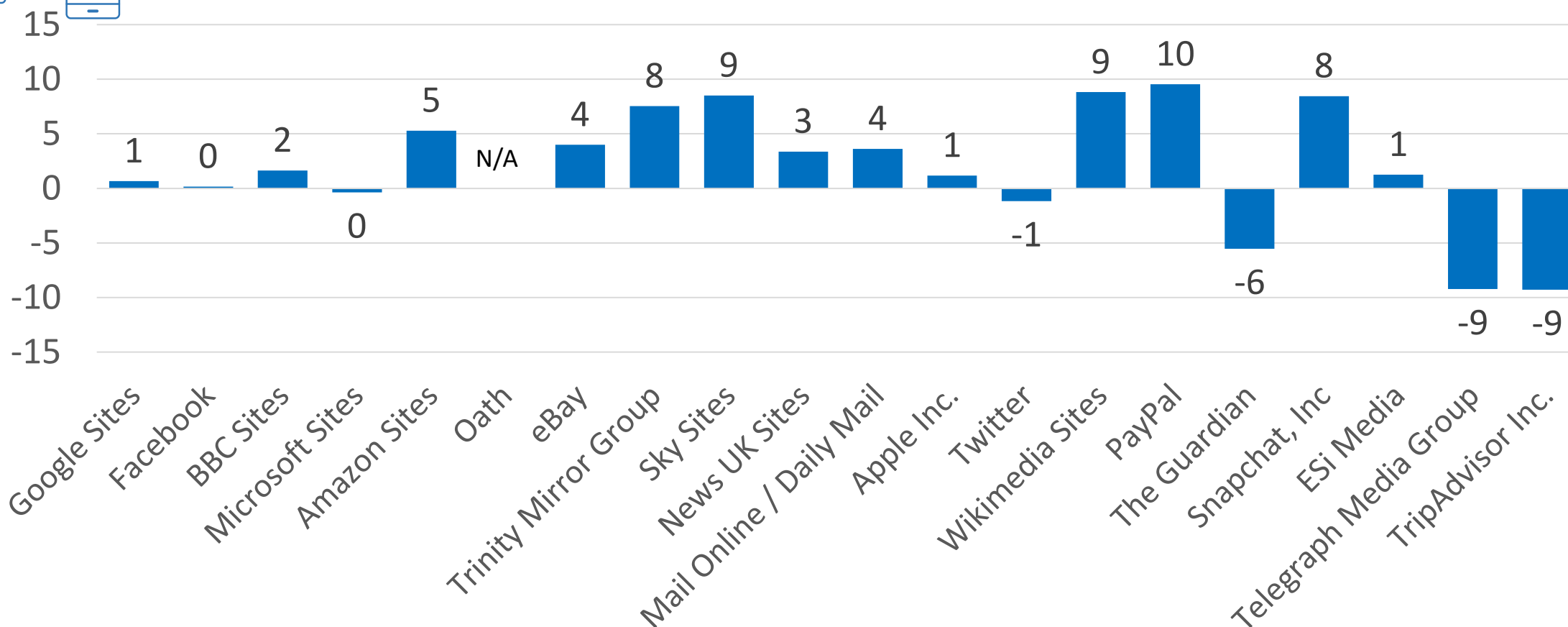


Key Changes: Dec 2017 v Sep 2017

Top 20 Properties by 'Unique Visitors' - % Change Sept 17 to Dec 17



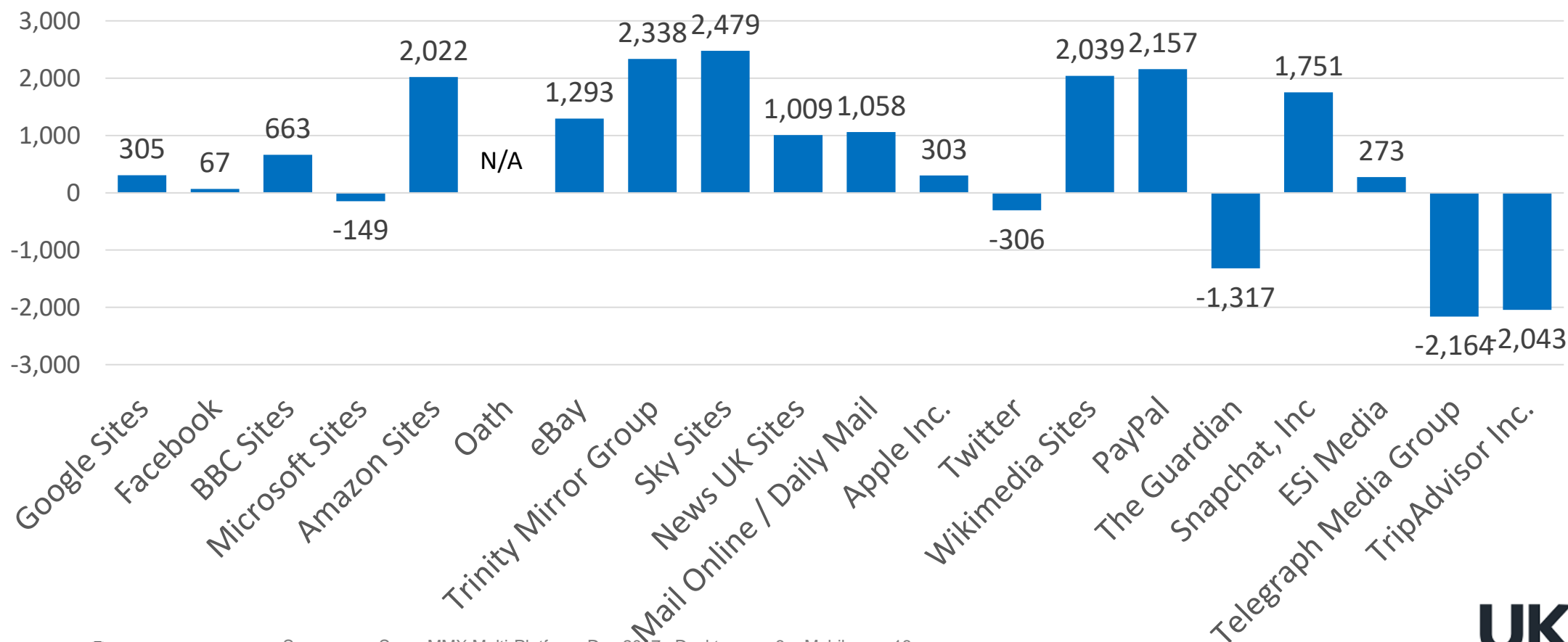
Unique Visitor % Growth Dec 2017 v Sept 2017



Top 20 Properties by 'Unique Visitors' - Change Sept 17 to Dec 17



Unique Visitor Change (000s) – Dec 17 v Sep 17

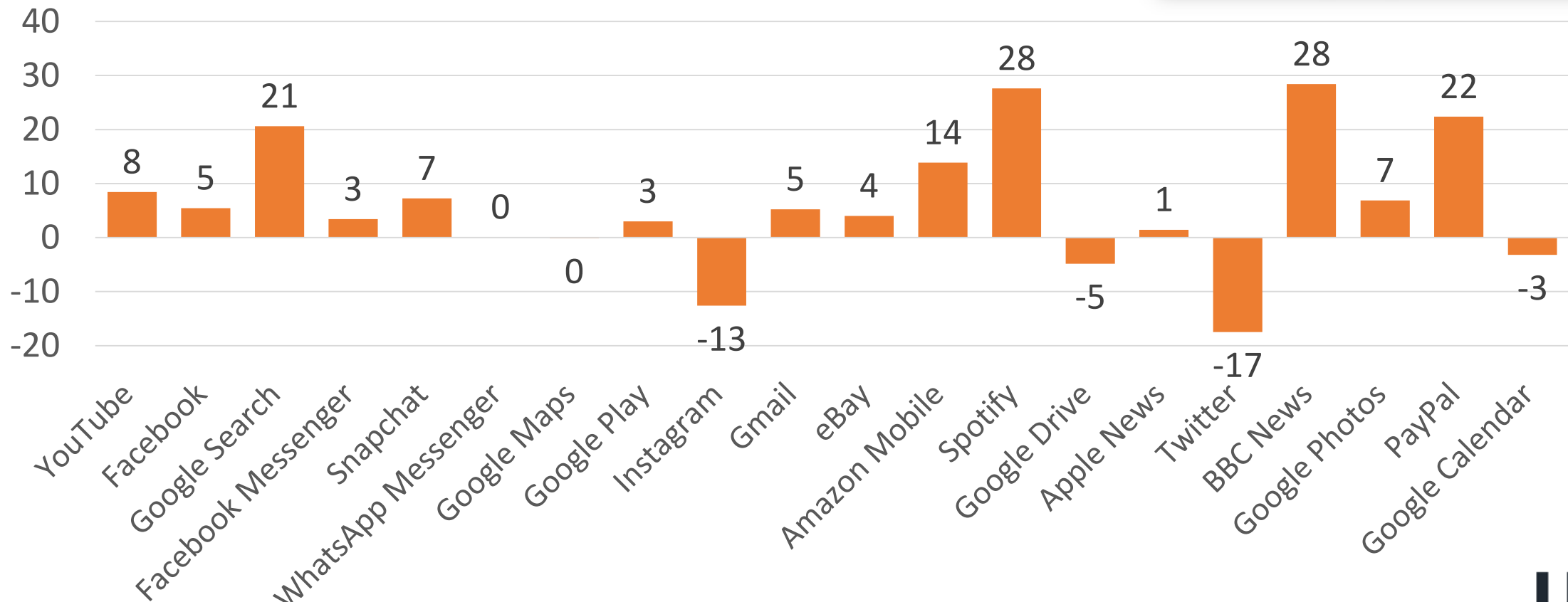


Top 20 Mobile Apps by 'Unique Visitors' - % Change Sept 17 to Dec 17



Unique Visitor % Growth Dec 2017 v Sept 2017

1.13m people visited the mobile app 'A Call from Santa' in December, giving it the largest growth with 1127%

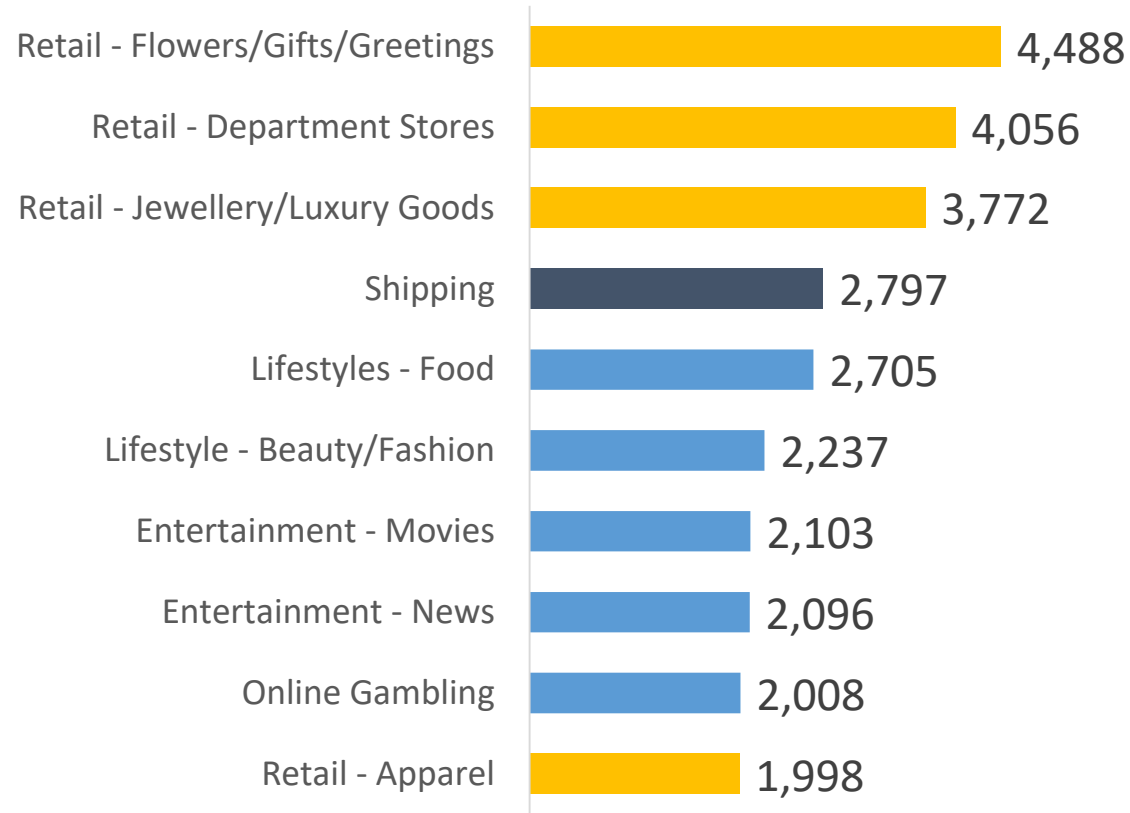


Top performing Categories based on Visitor & Minutes Growth Sept-Dec 2017

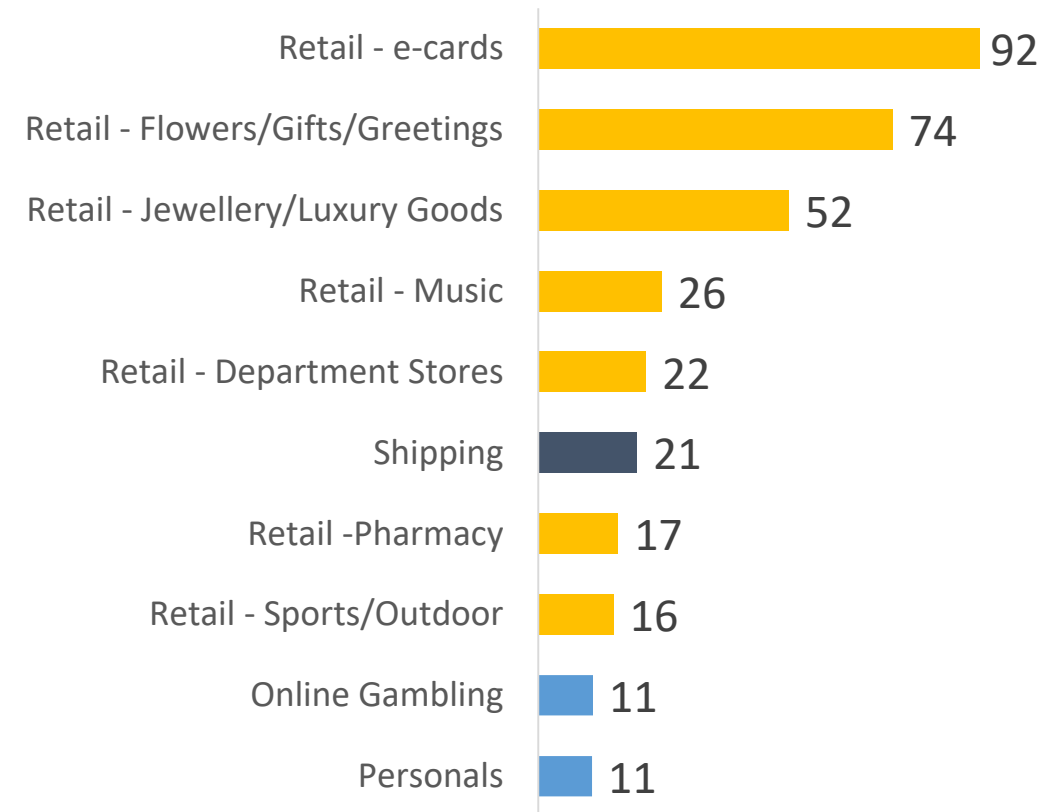
Retail dominates Top Growth Categories for Dec 2017

Category Growth – Dec 17 v Sept 17

Unique Visitor Increase: Dec 17 v Sep 17 (000s)



Unique Visitor % Increase: Dec 17 v Sep 17



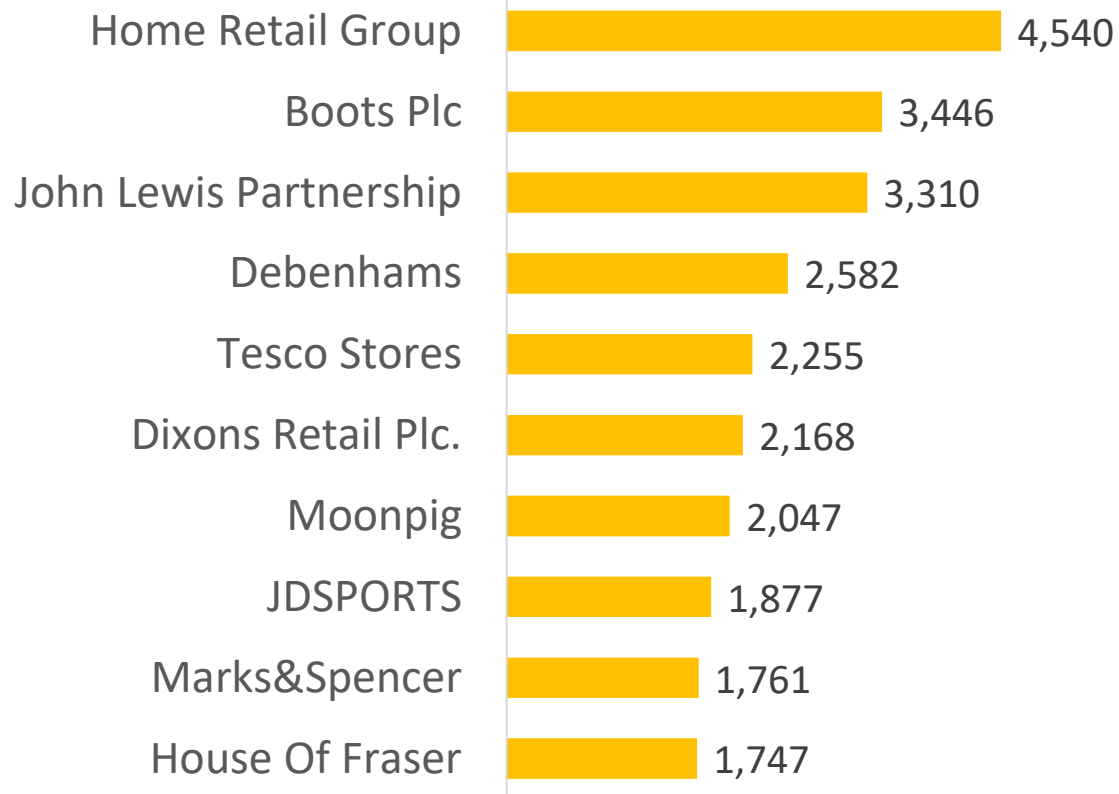
Source: comScore MMX Multi-Platform, Dec 2017, UK, 18+

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.

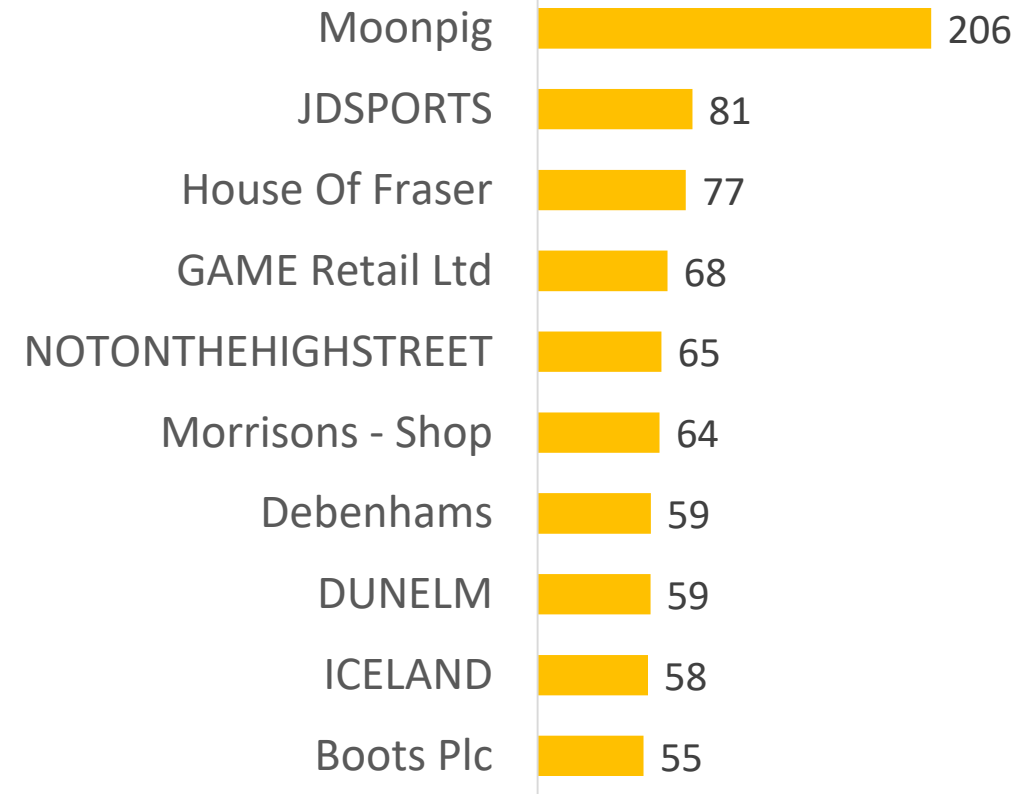
Top Gaining Retail Sites based on Visitor Growth Sept-Dec 2017

Change in Growth for Retailers (based on Top 50 Online retailers in Dec 2017)

Unique Visitor Increase: Dec 17 v Sep 17 (000s)



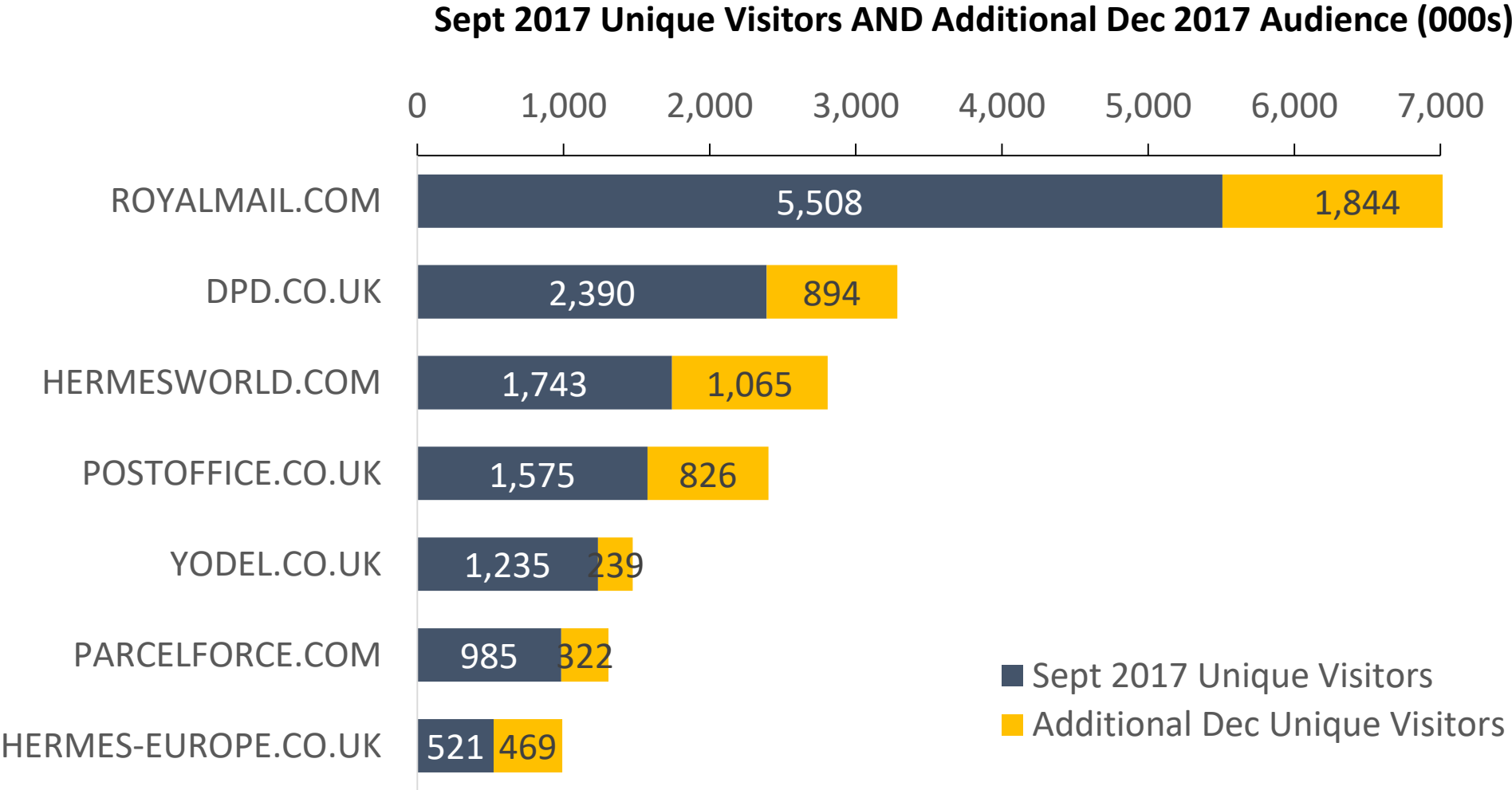
Unique Visitor % Increase: Dec 17 v Sep 17



Source: comScore MMX Multi-Platform, Dec 2017, UK, 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.

Big Gains for the Shipping Category in December



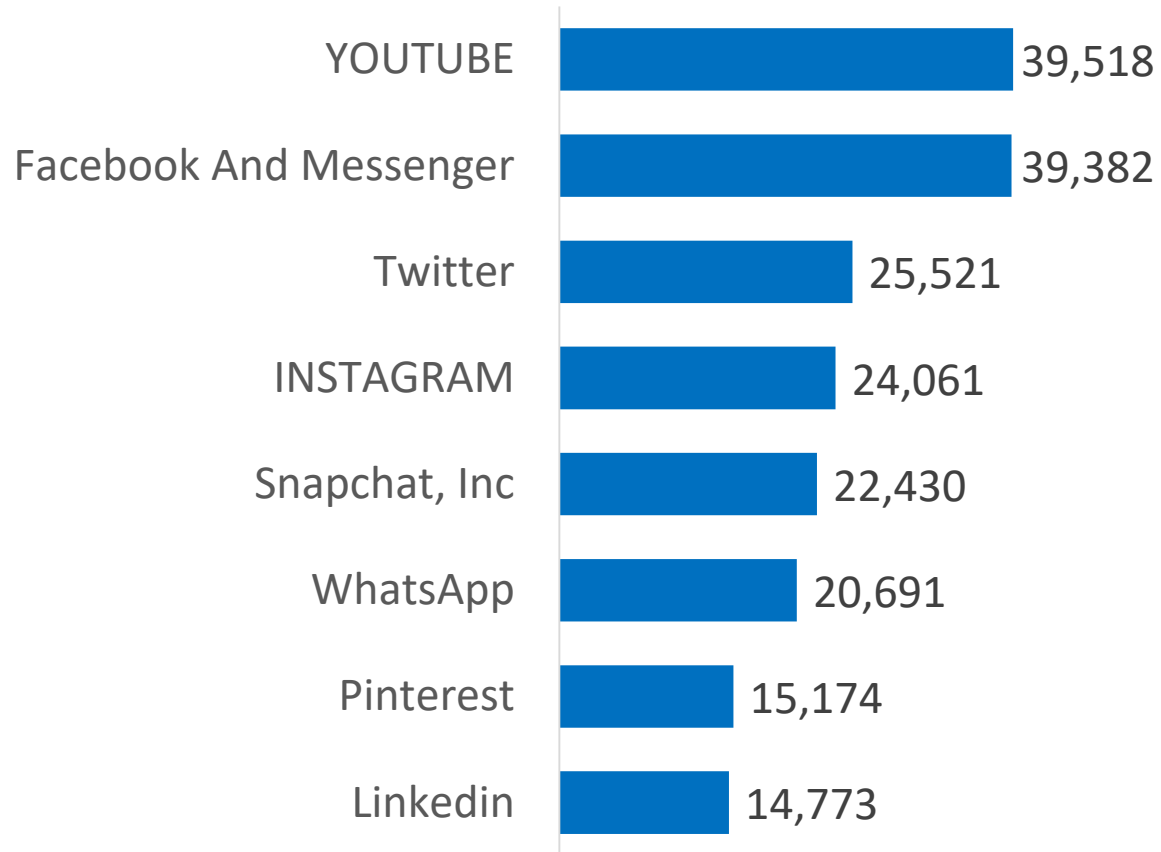
Source: comScore MMX Multi-Platform, Dec 2017, UK, 18 +

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.

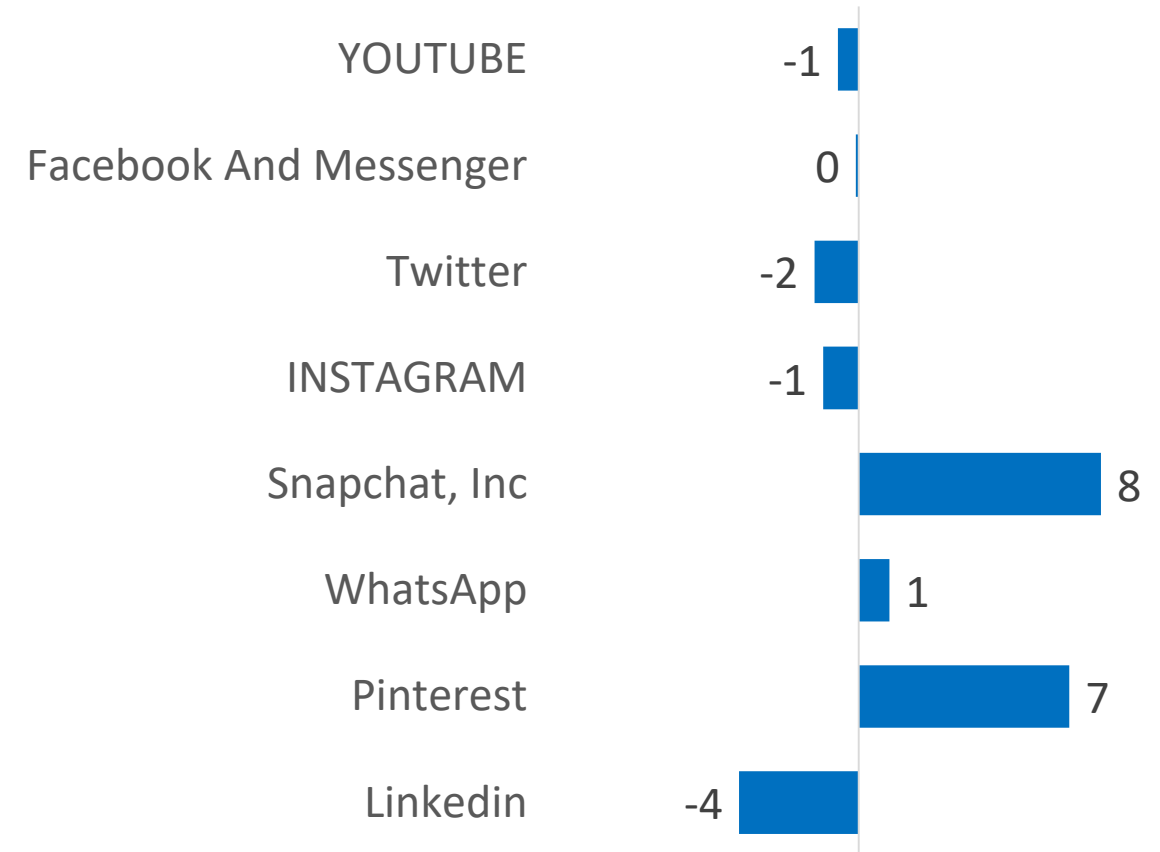
Change in Audience for Social Media Brands

Pinterest & Snapchat experienced biggest gains

Unique Visitors 18+ (000s) - December 2017



Unique Visitors 18+ % Change Sept 2017-Dec 2017



Questions?

Find out more at: <http://www.ukom.uk.net/>
Email us at: 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
- **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, 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/