



The impact of Covid-19 on UK online usage

Key changes April-May 2020

Julie Forey

Summary: May 2020

- Following consecutive increases for time online in March and April, average time per person declined slightly in May – by 8 mins among adults. However, adults still spent 28 more minutes online in May compared to January.
- Many categories which were negatively impacted in March and April are showing signs of recovering in terms of visitor numbers. Careers, property, maps, automotive and many retail categories experienced uplifts in May and even travel sites halted their decline as people started to explore holiday options.
- Conversely, many categories which benefitted from Covid-19, in particular news lost a big proportion of the audience they gained. This was particularly the case for the politics, technology and financial news publications which had done so well in March and April.
- Food retail remained high despite a slight decline in visitors to the online supermarkets. Fast food & food delivery brands increased audiences as restaurants remained closed. Sports retailers continued to do well – particularly those selling cycles and cycle equipment. Online Home & DIY stores gained audience between April and May and online clothing outlets also witnessed uplifts. Argos also added 1.3 million visitors between April and May and department stores began to recover.
- The automotive category also added audience between April and May – fuelled most by sites offering automotive classifieds and information.

Time online

UKOM

Key changes: Jan-May 2020

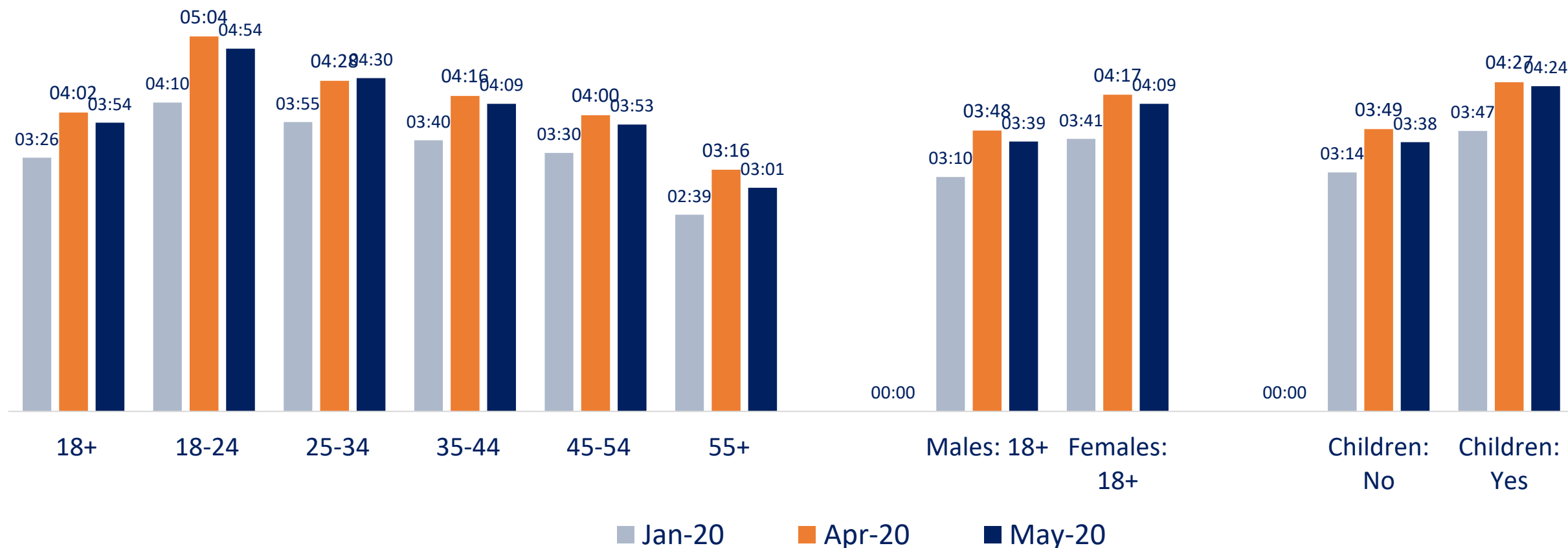
- Average time online peaked in April, surpassing 4 hours per day
- Between Jan & April, adults spent an extra 37 mins online per day
- Time dropped back slightly in May – average daily time online was down by 8 mins compared to April



Average time spent online per day by demos Jan-May 2020

Time online decreased slightly in May after peaking in April

HR:MN



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

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



Category recap

Jan-Apr 2020



Categories negatively impacted: Jan-Apr 2020



Major growth categories: Jan-Apr 2020



May: all categories

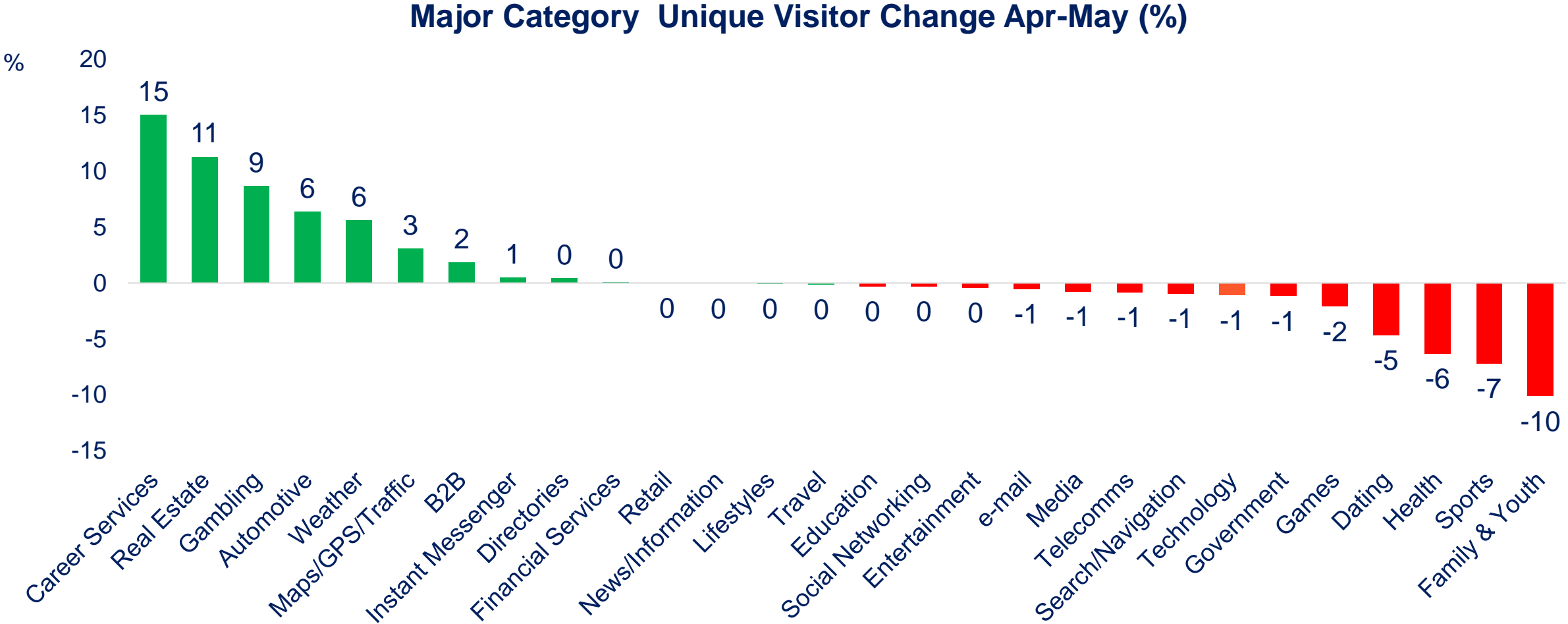
Key changes: Apr - May 2020

- Signs of recovery for many sectors which were most negatively impacted in March & April
- Sectors which benefitted starting to lose the audience they gained



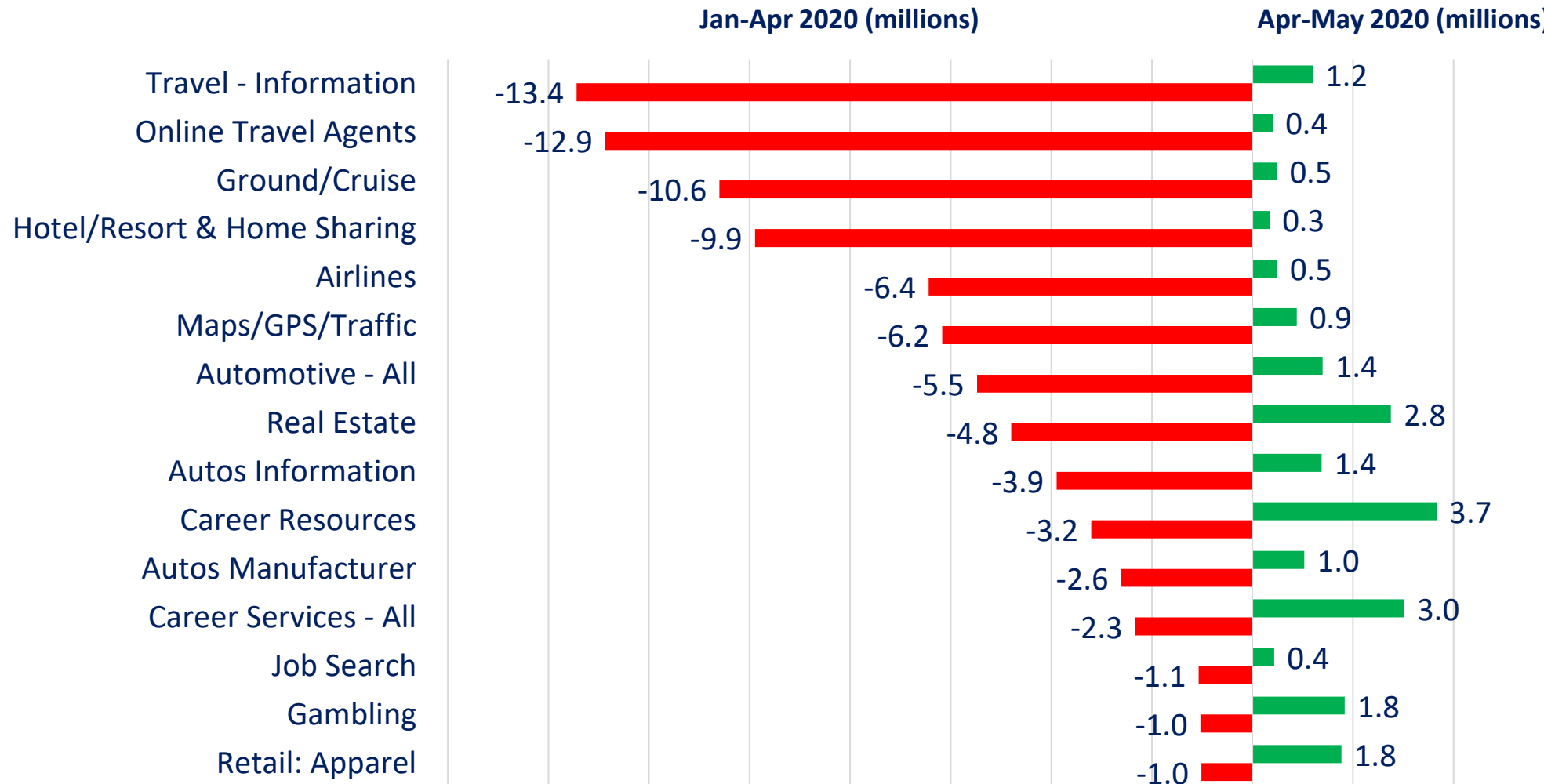
Category unique visitor change: Apr-May 2020 (%)

Career & Property started to bounce back after declines



Category unique visitor change: Jan-May 2020 (millions)

Evidence that many hard-hit sectors are starting to recover?

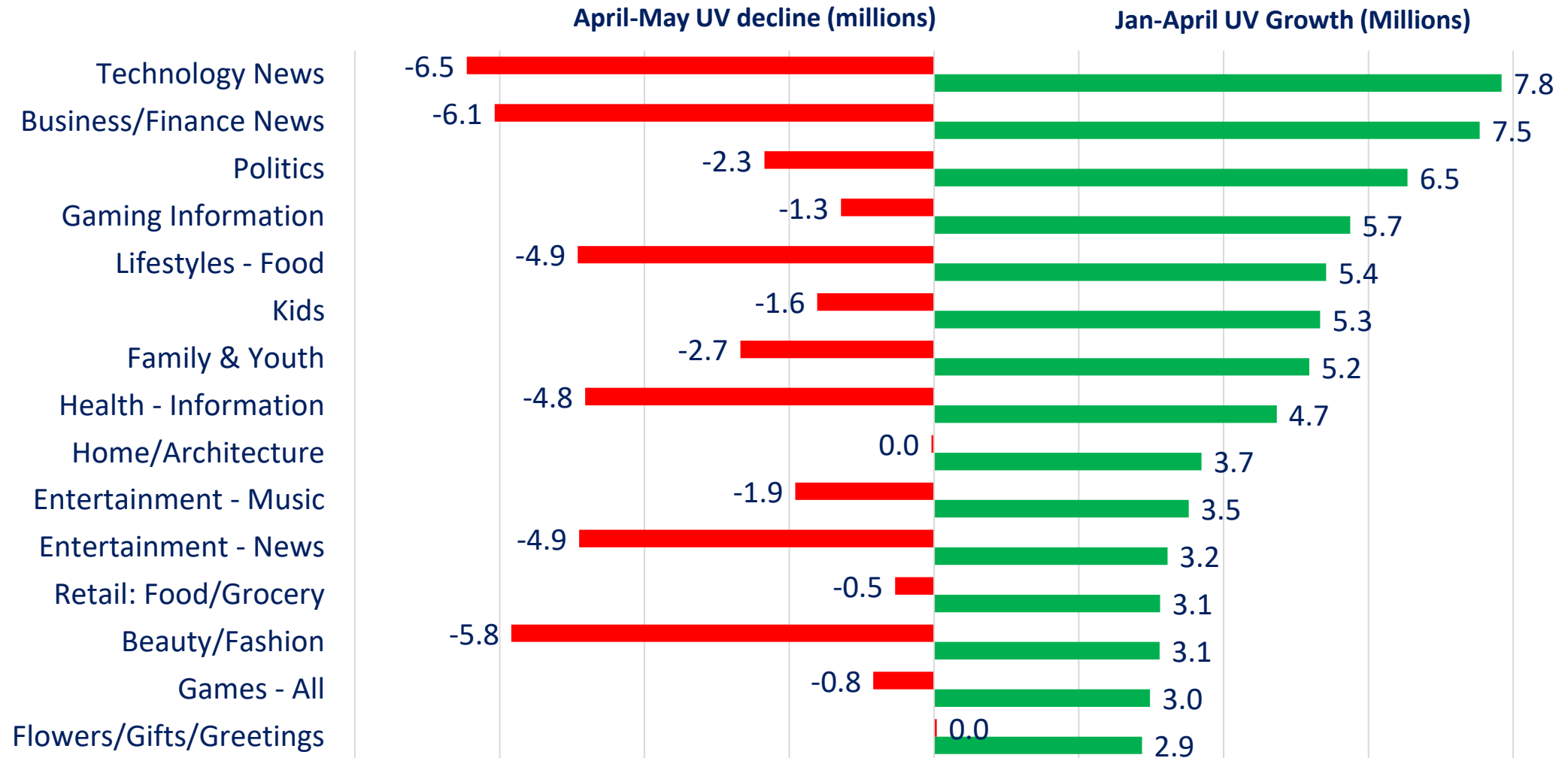


Source: Comscore MMX Multi-Platform, Adults 18+, Jan-May 2020, UK

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

Category unique visitor change: Jan-May 2020 (millions)

Growth categories lose customers gained during the Covid peak

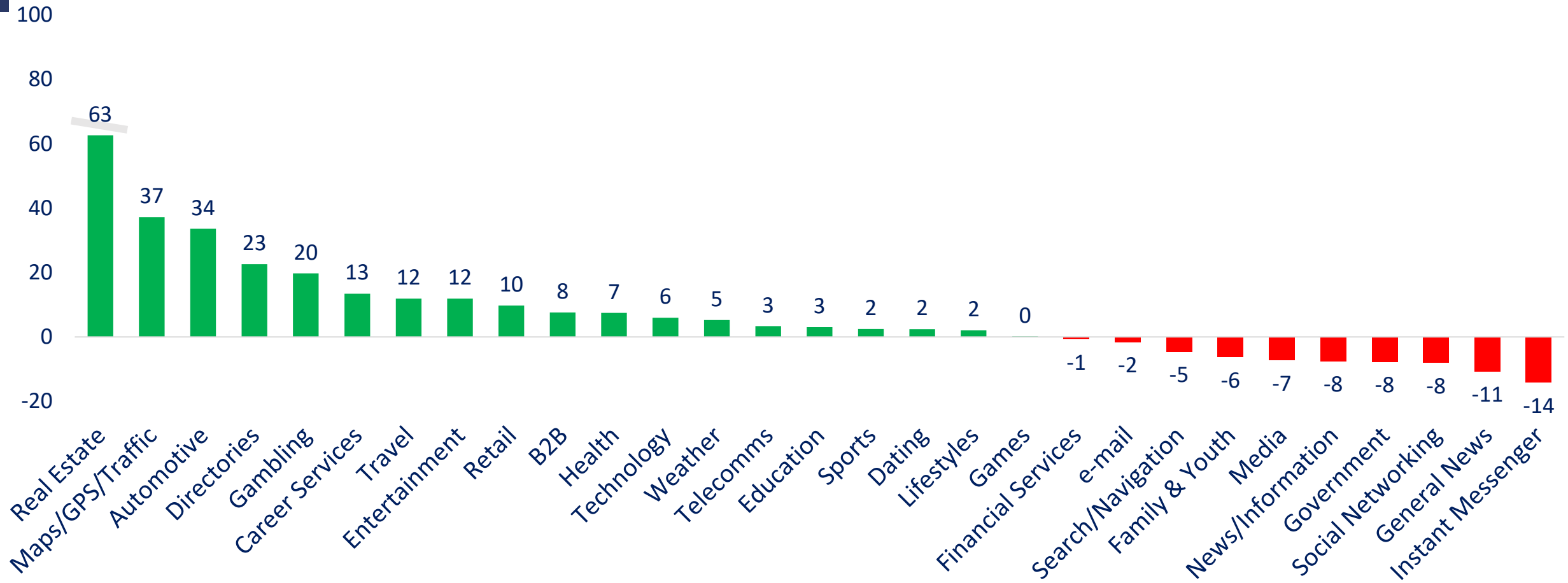


Source: Comscore MMX Multi-Platform, Adults 18+, Jan -May 2020, UK

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Category time online change: Apr-May 2020 (%)

Property, maps, automotive all experienced uplifts

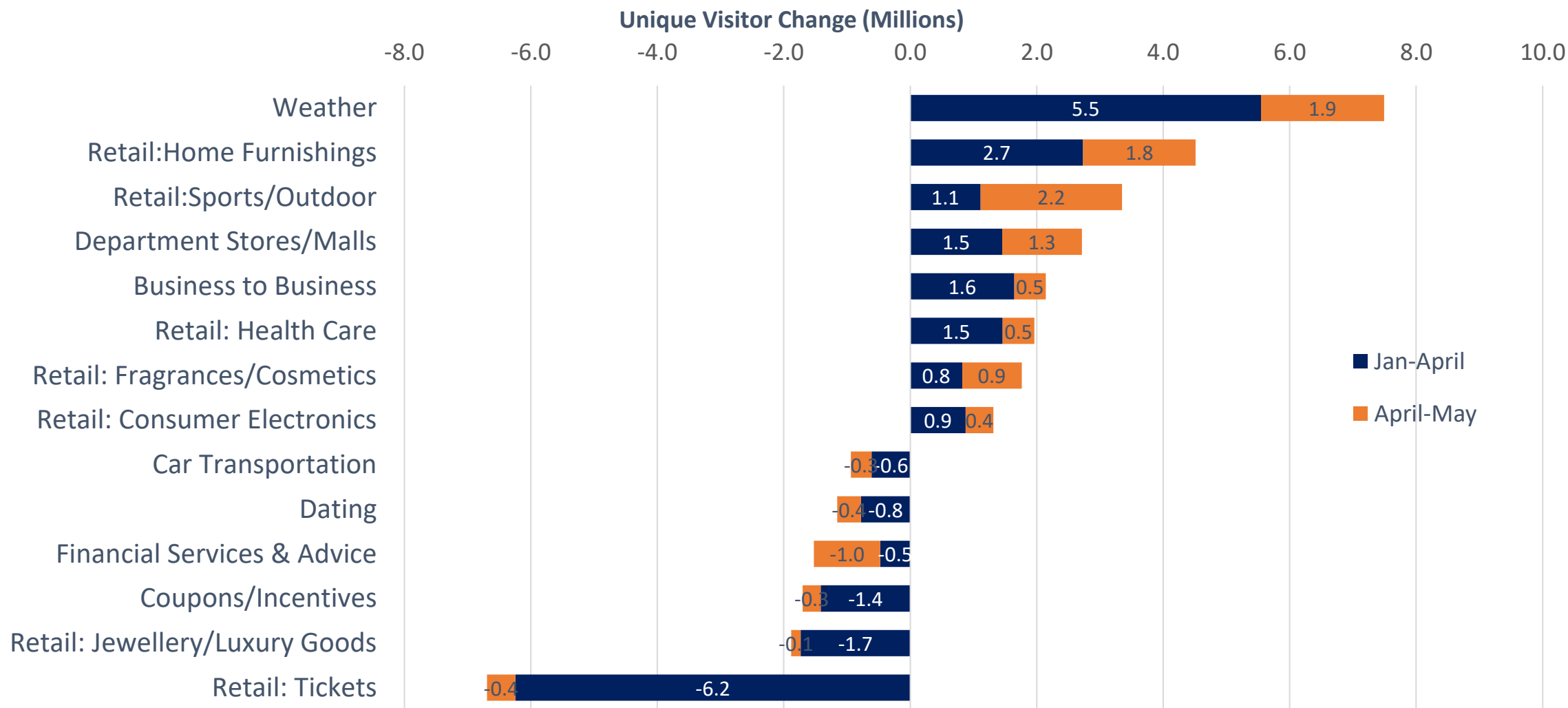


Source: Comscore MMX Multi-Platform, Adults 18+, Apr & May 2020, UK

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

Category unique visitor change: Jan-May 2020 (Millions)

Categories which have continued to grow or decline



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

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Growth categories

Apr-May 2020



Major growth categories: Apr-May 2020

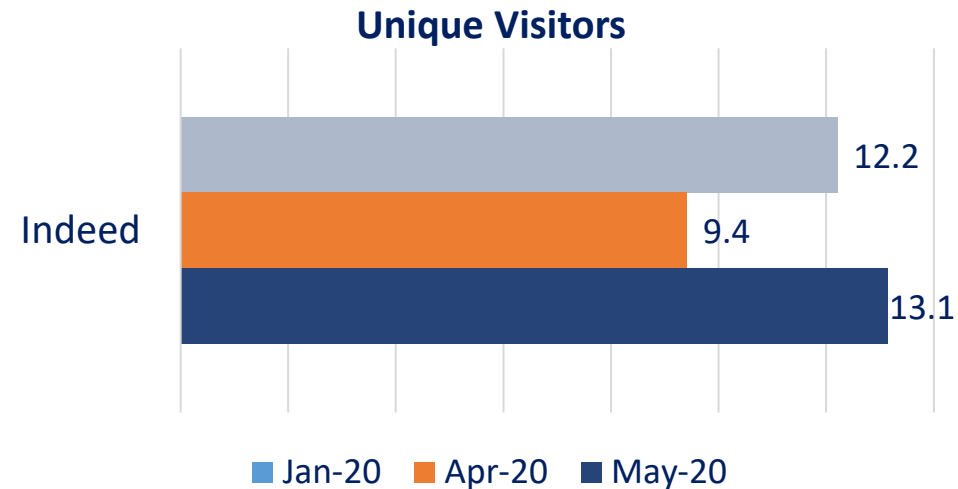


Careers: Apr-May 2020



- Career Services added over 3million visitors between Apr and May, the highest audience in 2020. However, total minutes online and average minutes per visitor were low compared to pre Covid-19 levels
- Indeed fuelled the increase by adding 3.7 million unique visitors, an increase of 40% in the last month

Real Estate	Jan-20	Apr-20	May-20
Total Unique Visitors (m)	22.4	20.1	23.1
% Reach	49.8	44.3	51.0
Total Minutes (m)	840	420	476
Average Mins per Visitor	37.5	20.9	20.6



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

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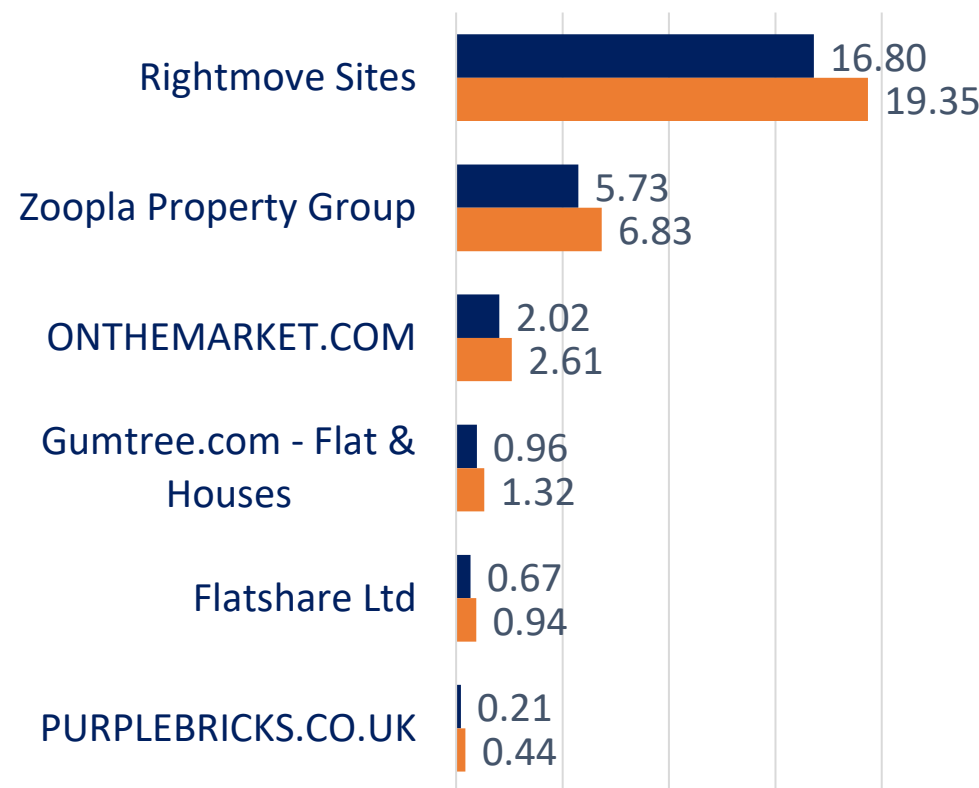
Real Estate: Apr-May 2020



Real Estate	Jan-2020	Apr-20	May-20
Total Unique Visitors (m)	29.2	24.4	27.1
% Reach	64.8	53.7	59.8
Total Minutes (MM)	1,197	723	1,175
Average Mins per Visitor	41.1	29.7	43.4

- After losing 4.8m visitors between Jan and April, the real estate category picked up in May, adding 2.8m.

Unique Visitors (Millions)



■ Apr-2020 ■ May-2020

Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

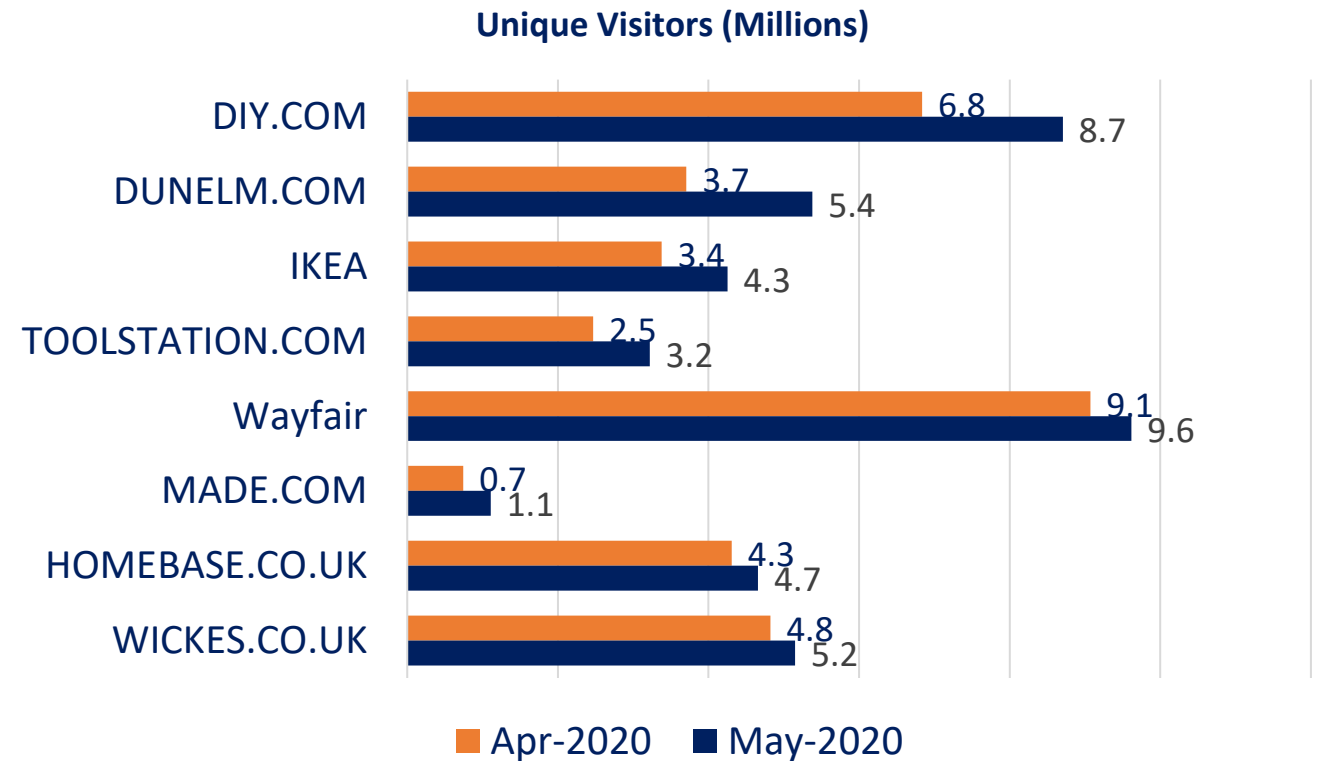
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Retail home: Apr-May 2020



Real Estate	Jan-20	Apr-20	May-20
Total Unique Visitors (m)	19.8	22.5	24.3
% Reach	44.0	49.7	53.6
Total Minutes (m)	297	465	510
Average Mins per Visitor	15.0	20.6	21.0

- Home & DIY Retail has continued to grow month-on month during the crisis. Visitors grew by 9% between April and May



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

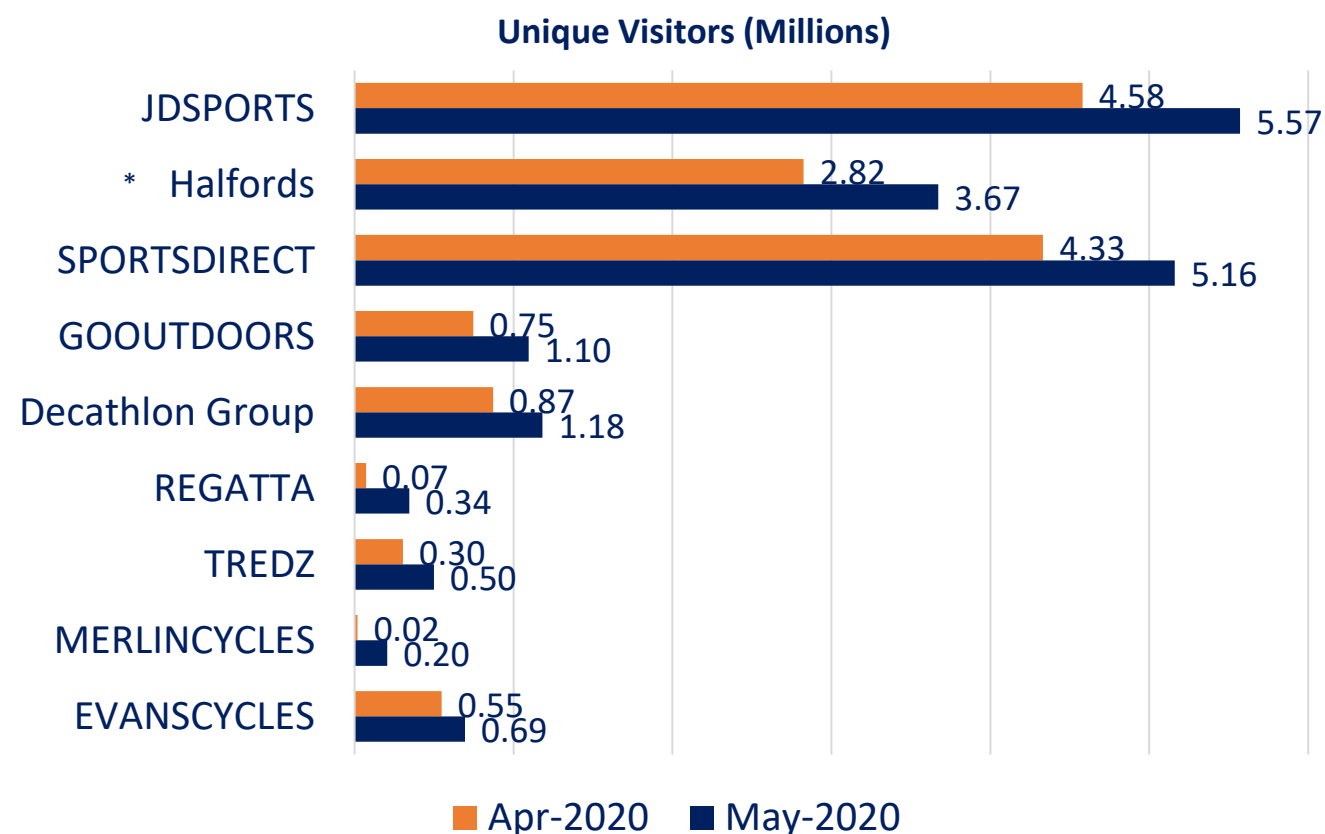
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Retail: sport/outdoor Apr-May 2020



- Sport and outdoor retail has continued to grow month-on-month. Visitors grew by 18% between April and May - cycle retailers contributed strongly.

Real Estate	Jan-2020	Apr-20	May-20
Total Unique Visitors (m)	11.3	12.4	14.7
% Reach	25.1	27.4	32.3
Total Minutes (MM)	126	148	183
Average Mins per Visitor	11.1	11.9	12.5



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

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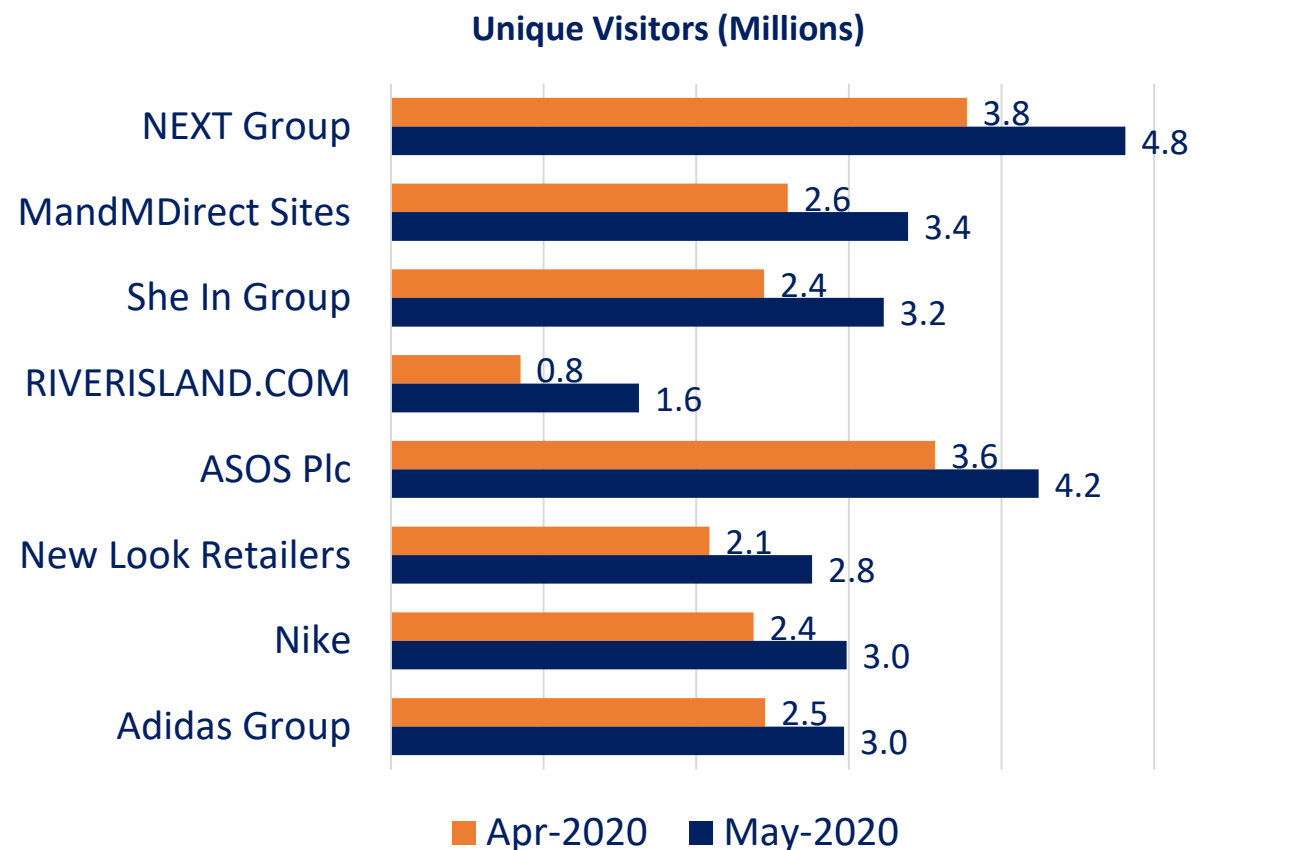
* Halfords not listed in Sport/Outdoor Category but added for comparison due to 'Cycle' focus.

Retail: apparel Apr-May 2020



Real Estate	Jan-2020	Apr-20	May-20
Total Unique Visitors (m)	26.6	25.6	27.4
% Reach	59.2	56.5	60.4
Total Minutes (MM)	1,008	954	1,217
Average Mins per Visitor	37.8	37.2	44.4

- The top 20 online clothing retails all experienced an uplift in visitors in May, after the sector lost 2 million visitors between Jan and March.



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

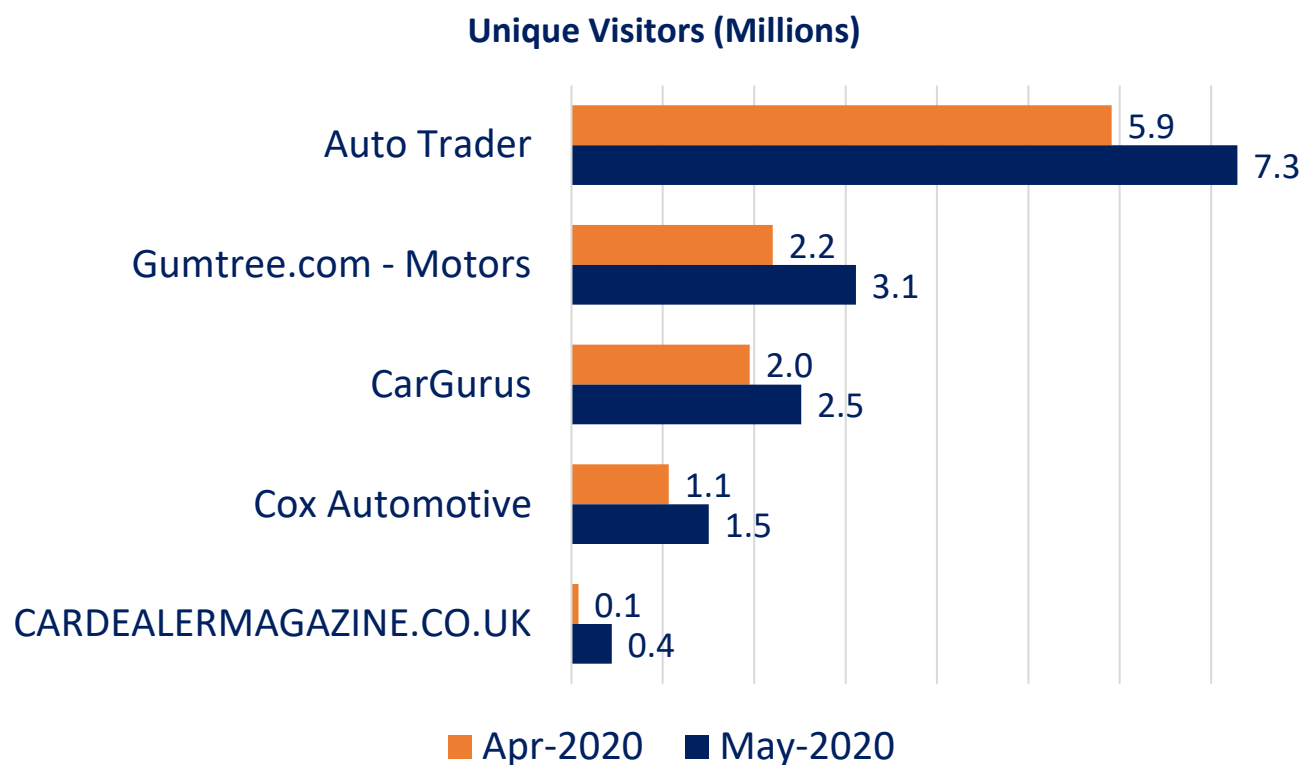
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Automotive: Apr-May 2020



- Growth between April and May came more from sites offering automotive classifieds & information rather than manufacturers

Real Estate	Jan-20	Apr-20	May-20
Total Unique Visitors (m)	27.31	21.84	23.23
% Reach	60.7	48.2	51.3
Total Minutes (m)	1,418	635	849
Average Mins per Visitor	51.9	29.1	36.5

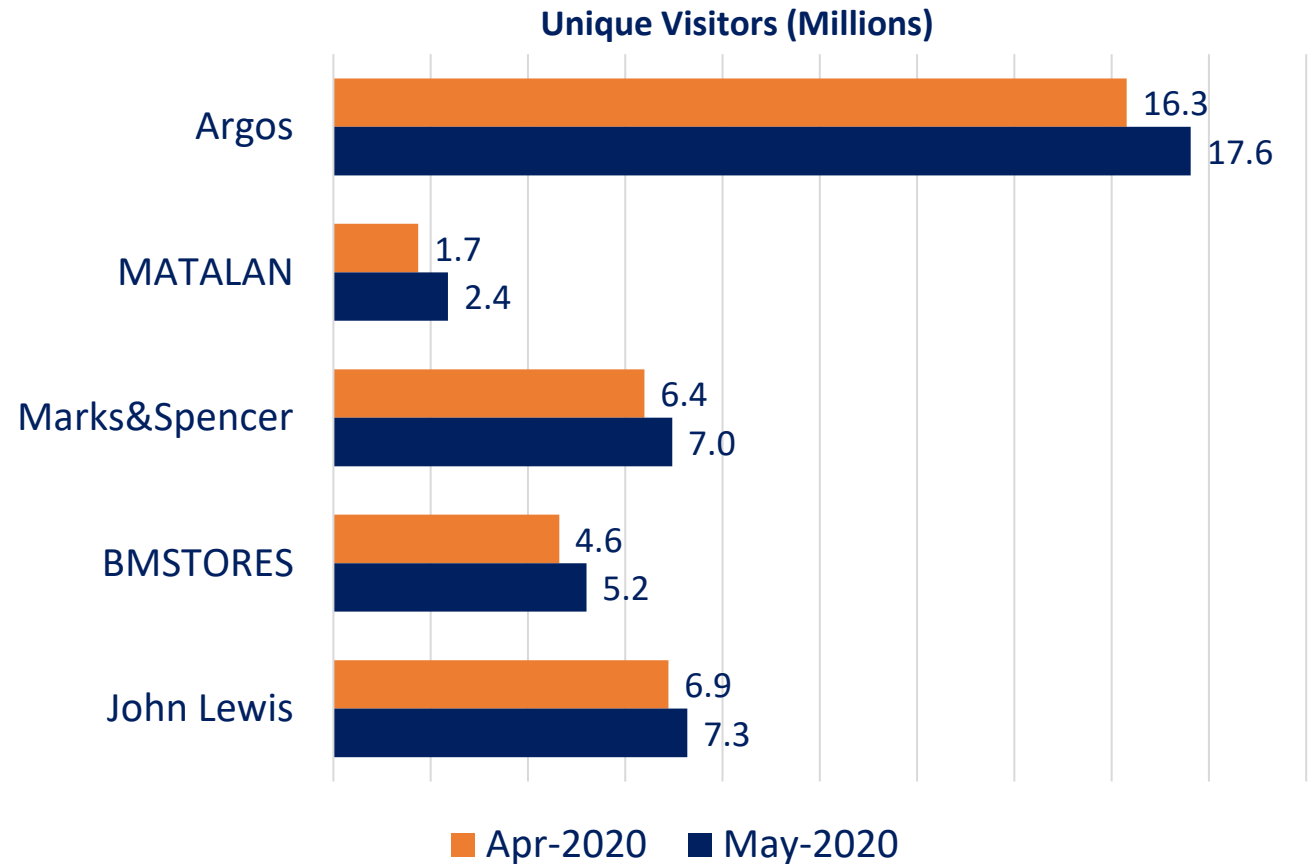


Department stores: Apr-May 2020



- The audience increased by 2.8 million between April and May – Argos was a major contributor to growth after adding 1.3m

Real Estate	Jan-20	Apr-20	May-20
Total Unique Visitors (m)	27.0	28.5	29.8
% Reach	60.1	62.9	65.6
Total Minutes (m)	645	760	834
Average Mins per Visitor	23.9	26.7	28.0



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

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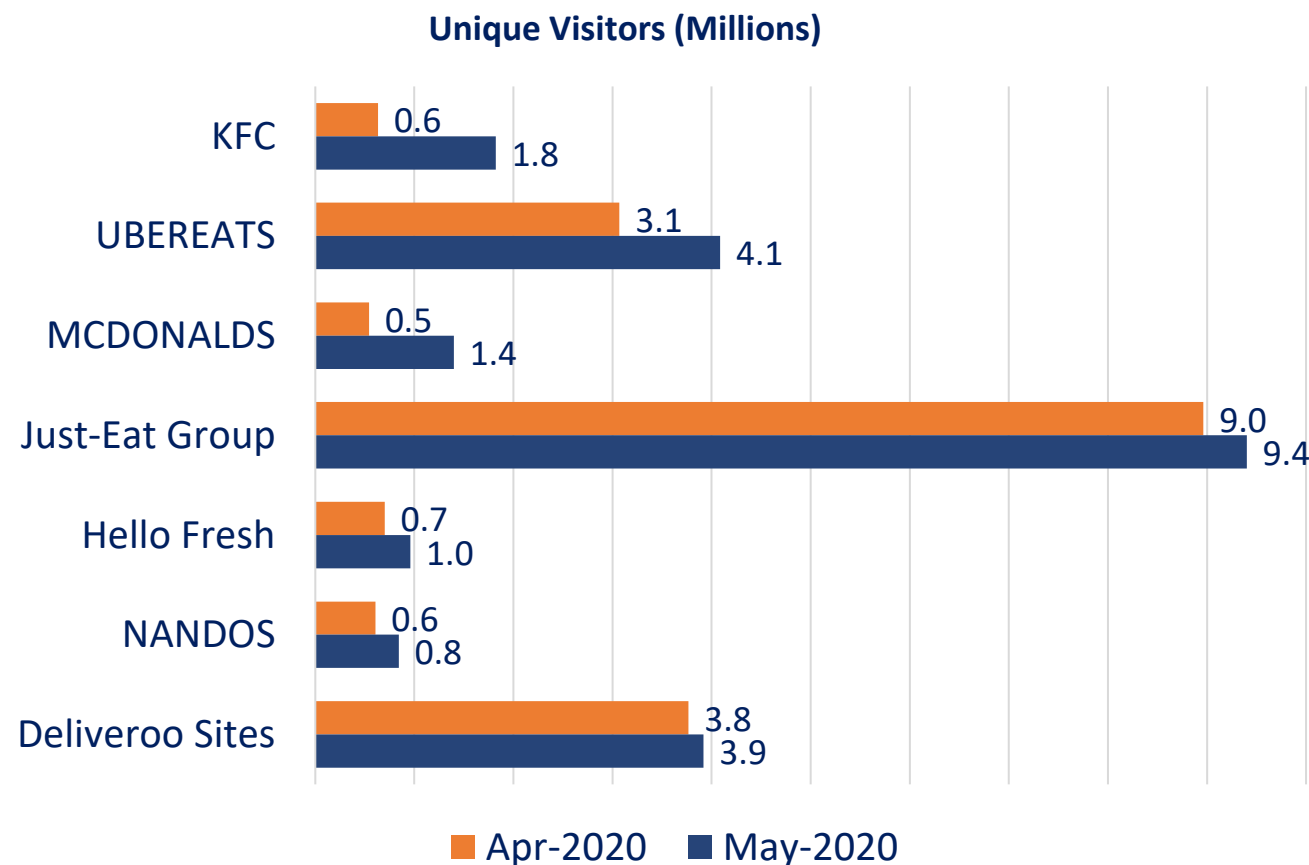
Retail – Food (fast food*): Apr-May 2020



- Although, visitors to grocery stores declined by 0.5m between April and May, fast food and food delivery continued to grow.

Real Estate	Jan-20	Apr-20	May-20
Total Unique Visitors (m)	12.4	13.7	14.6
% Reach	27.6	30.3	32.3
Total Minutes (m)	264	341	390
Average Mins per Visitor	21.3	25	27

* Custom group above includes Top 8 fast food properties/media titles listed in Comscore by Unique visitors, 18+.



Source: Comscore MMX Multi-Platform, Adults 18+, Jan – May 2020, UK

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Growth brands & apps

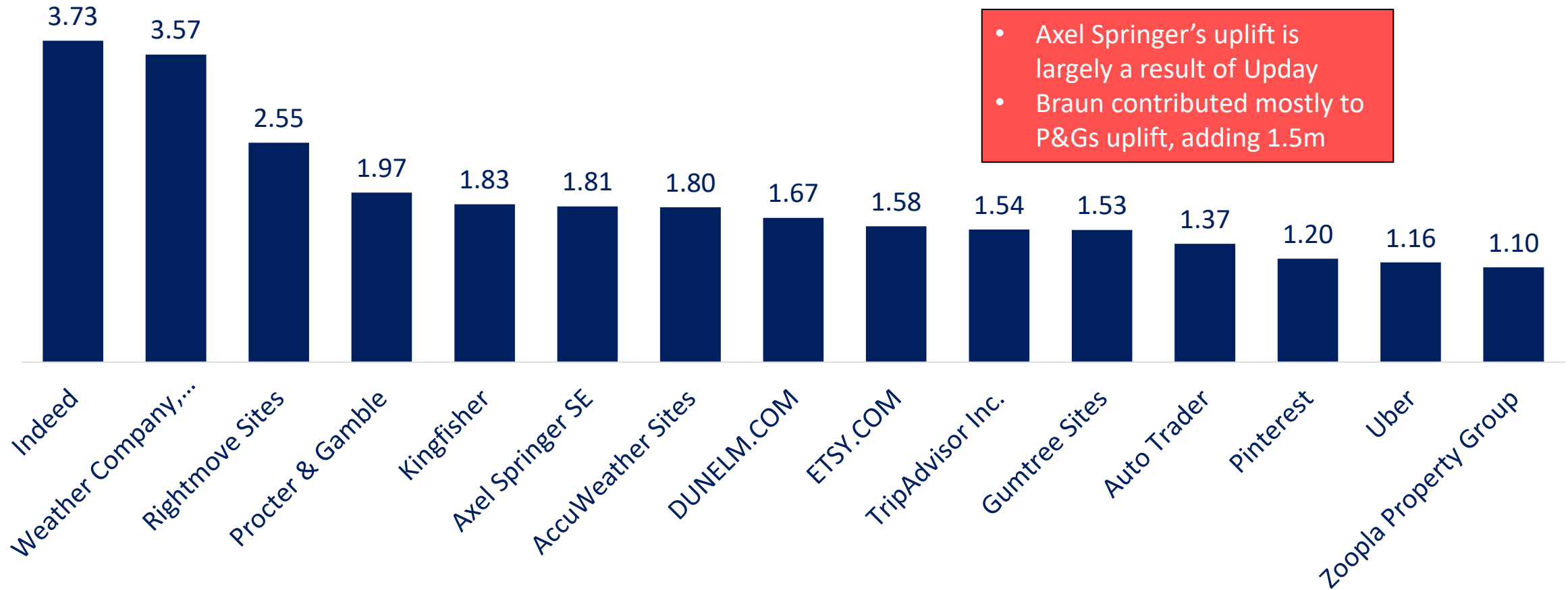
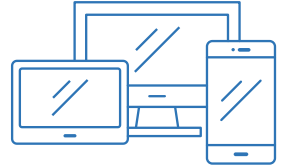
Key changes: Apr-May 2020



Properties adding MOST unique visitors: Apr-May 2020

Property, home & weather feature most in the top 20

Additional 18+ Unique Visitors (Millions): April to May 2020

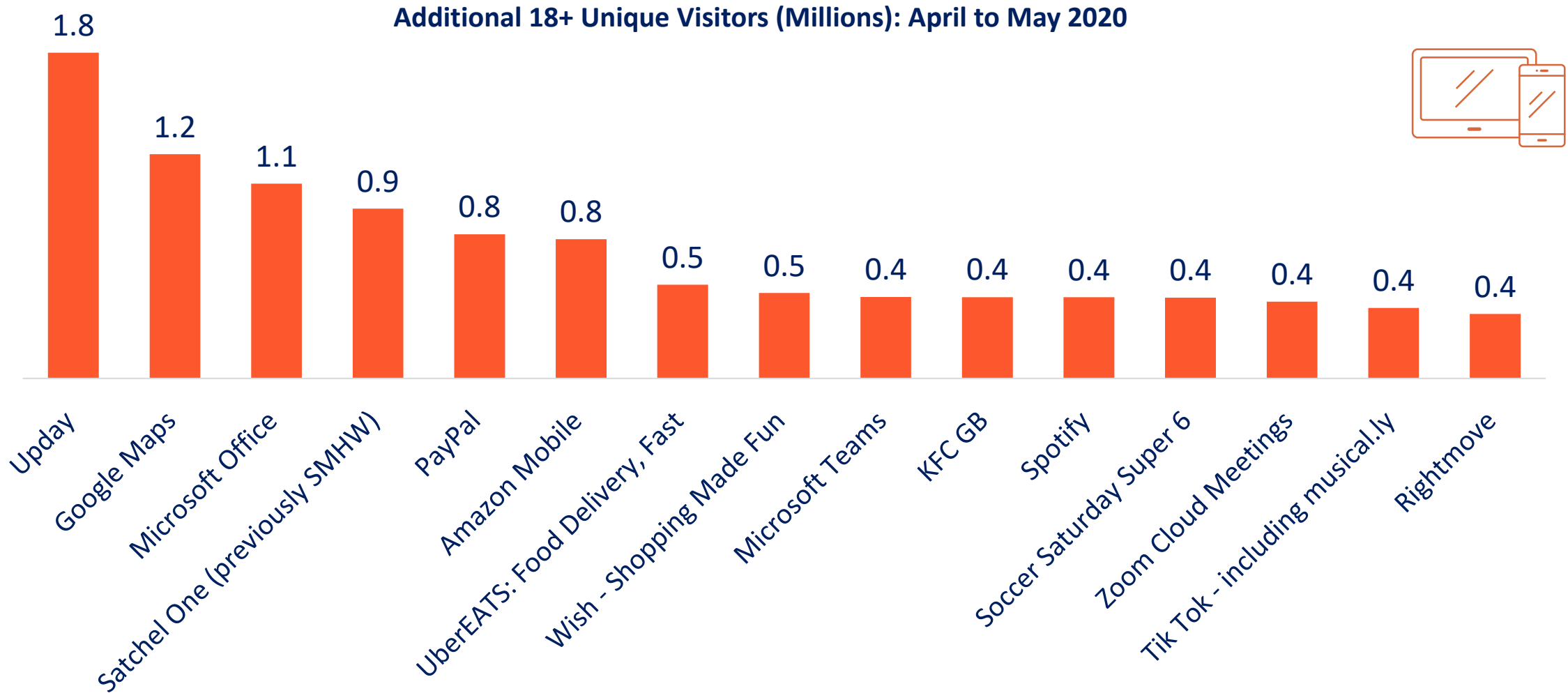


Source: Comscore MMX Multi-Platform, Adults 18+, Apr & May 2020, UK

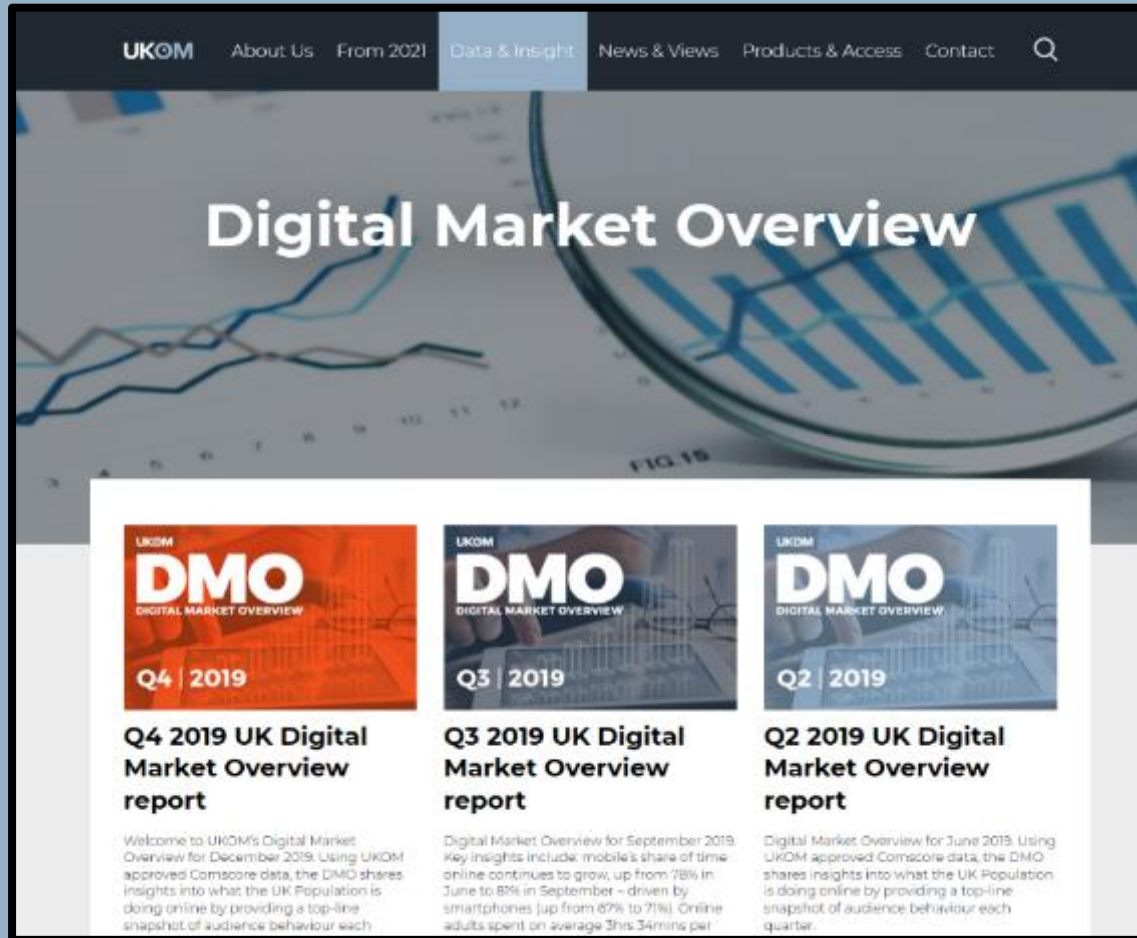
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Mobile apps adding MOST unique visitors: Apr-May 2020

No longer the huge uplifts experienced in March and April



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Digital Market Overview

Q4 2019 UK Digital Market Overview report

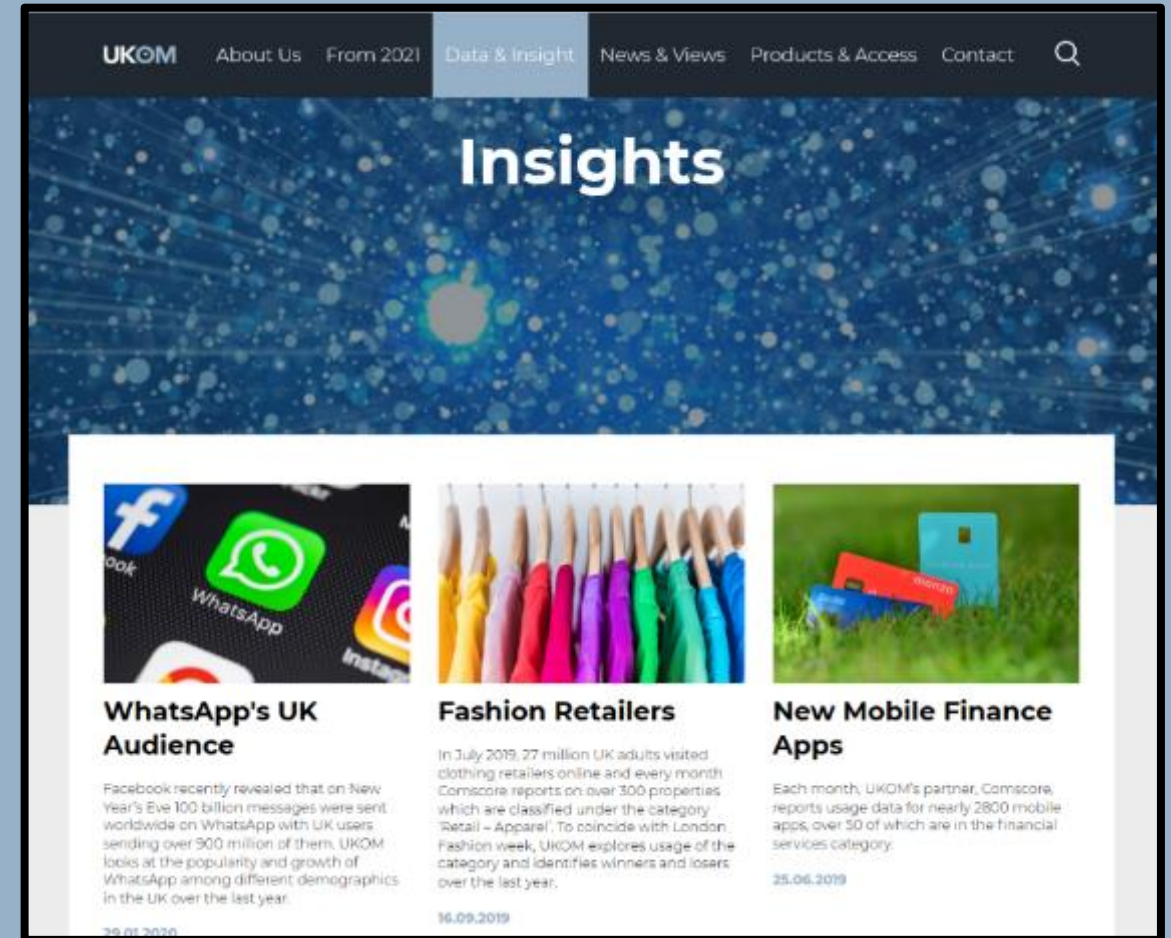
Welcome to UKOM's Digital Market Overview for December 2019. Using UKOM approved Comscore data, the DMO shares insights into what the UK Population is doing online by providing a top-line snapshot of audience behaviour each

Q3 2019 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 8% in September – driven by smartphones (up from 67% to 71%). Online adults spent on average 3hrs 34mins per

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.

16.09.2019

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.

25.06.2019

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.

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

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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/