

**UKOM**

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# **Digital Market Overview**

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**September 2020**



# The UK Digital Market Overview Sep 2020



This Digital Market Overview focuses on UK audience usage in September 2020 and how it compares to June 2020.

For detailed analysis of the impact of Covid-19 and the first lockdown on monthly UK online behaviour between

Jan and May 2020, please access UKOM's series of additional monthly insights at

<https://ukom.uk.net/insights.php>





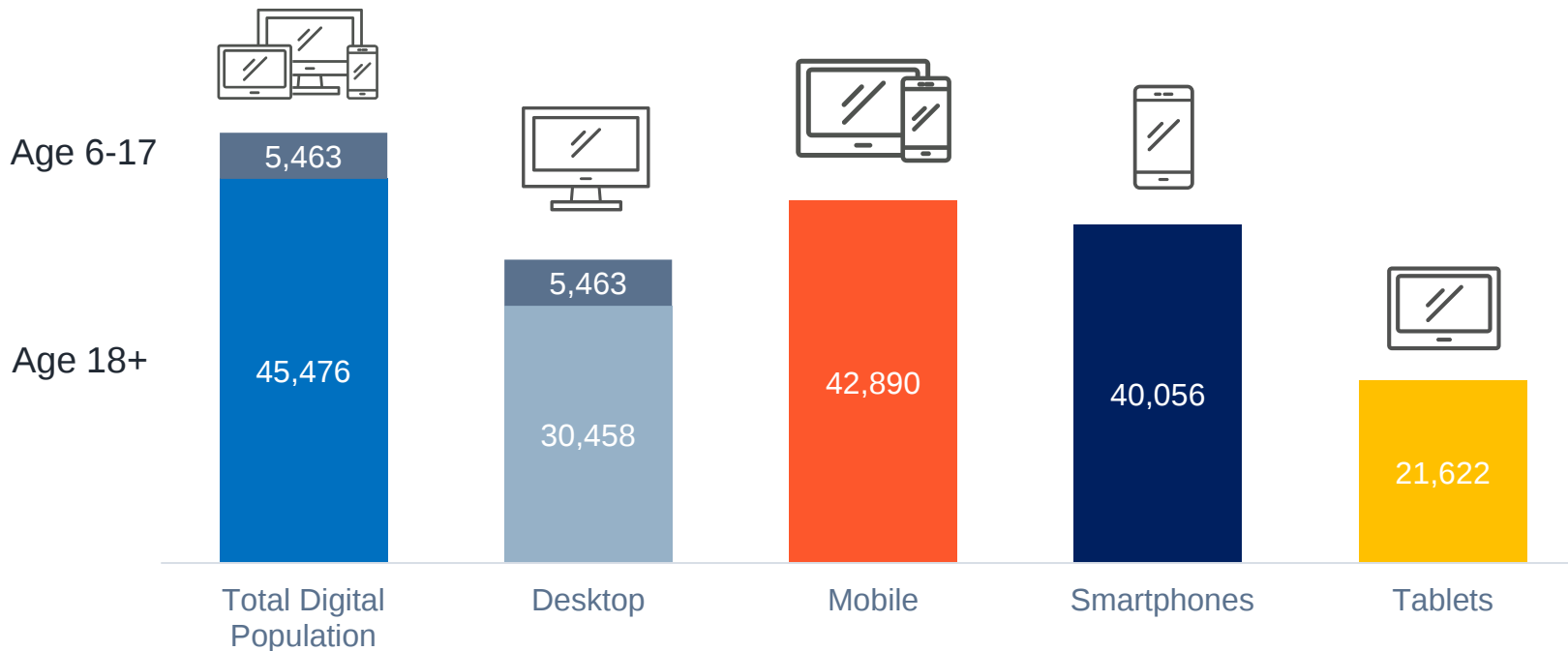
# Audience by Platform

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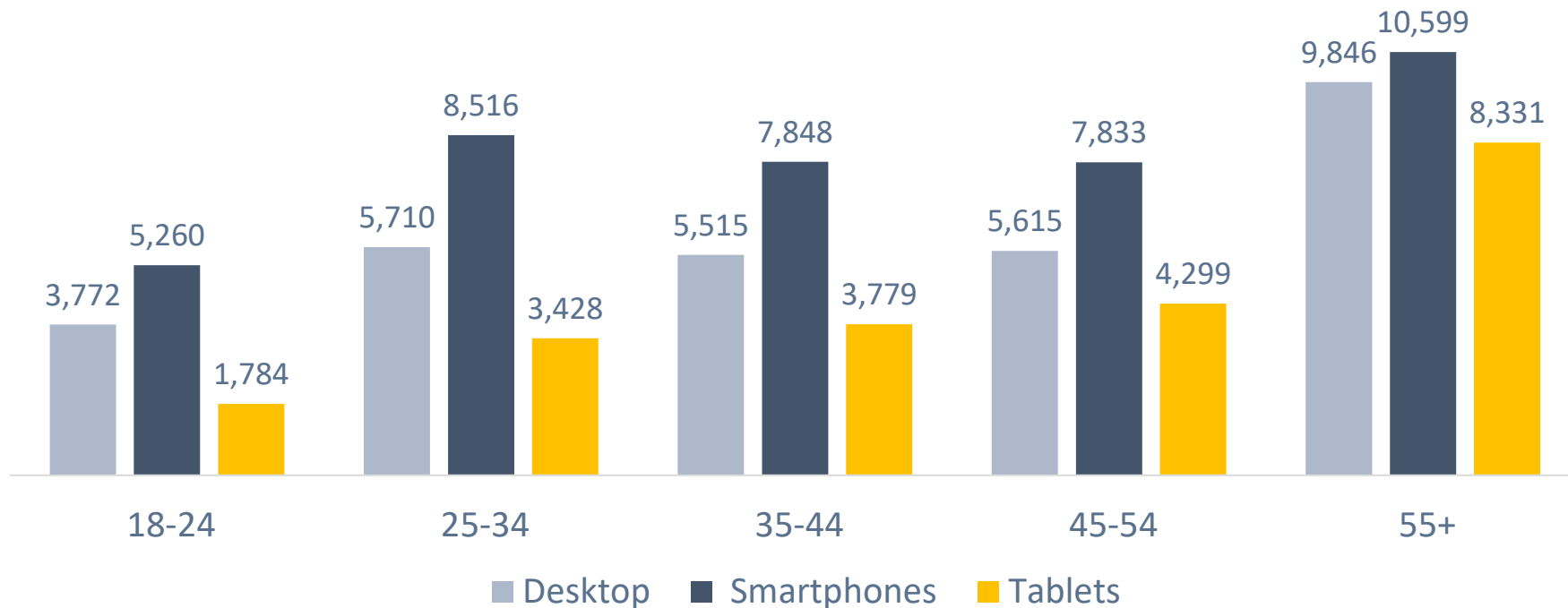
# Digital unique visitors by platform (000s)

More people use smartphones than PCs



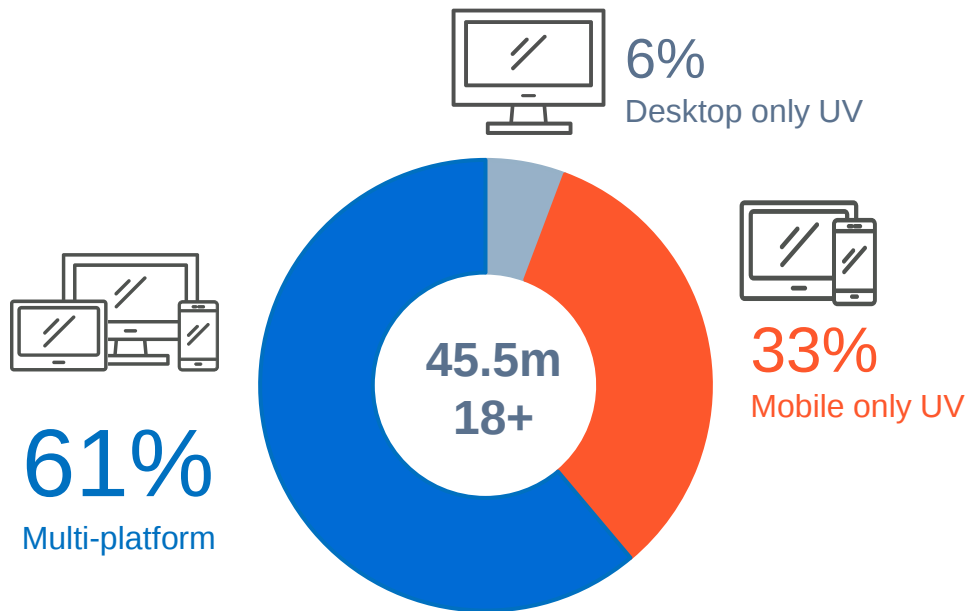
# Platform unique visitors by age (000s)

Smartphone use is the most popular platform across all age groups

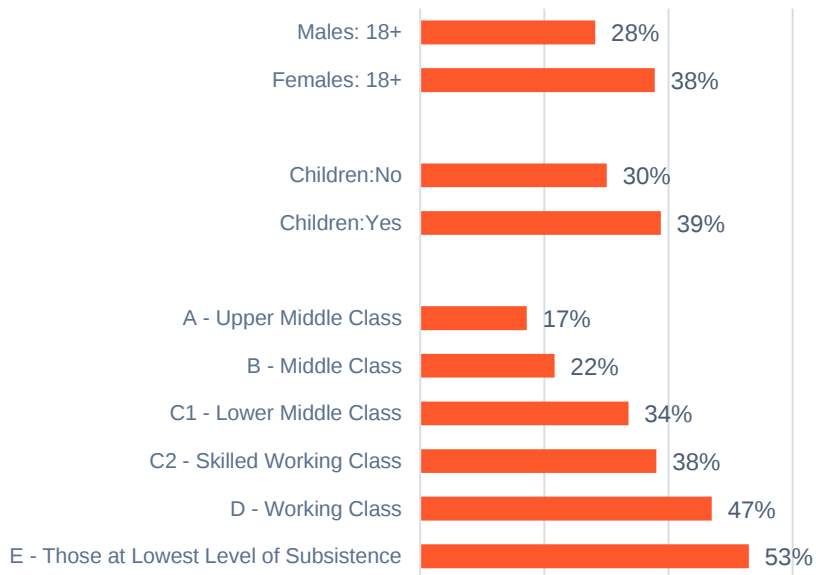


# Multi and solus platform unique visitors

1/3 of adults are mobile only – higher among females, parents and lower social grades



## 'Mobile only' share by demos



# Time online

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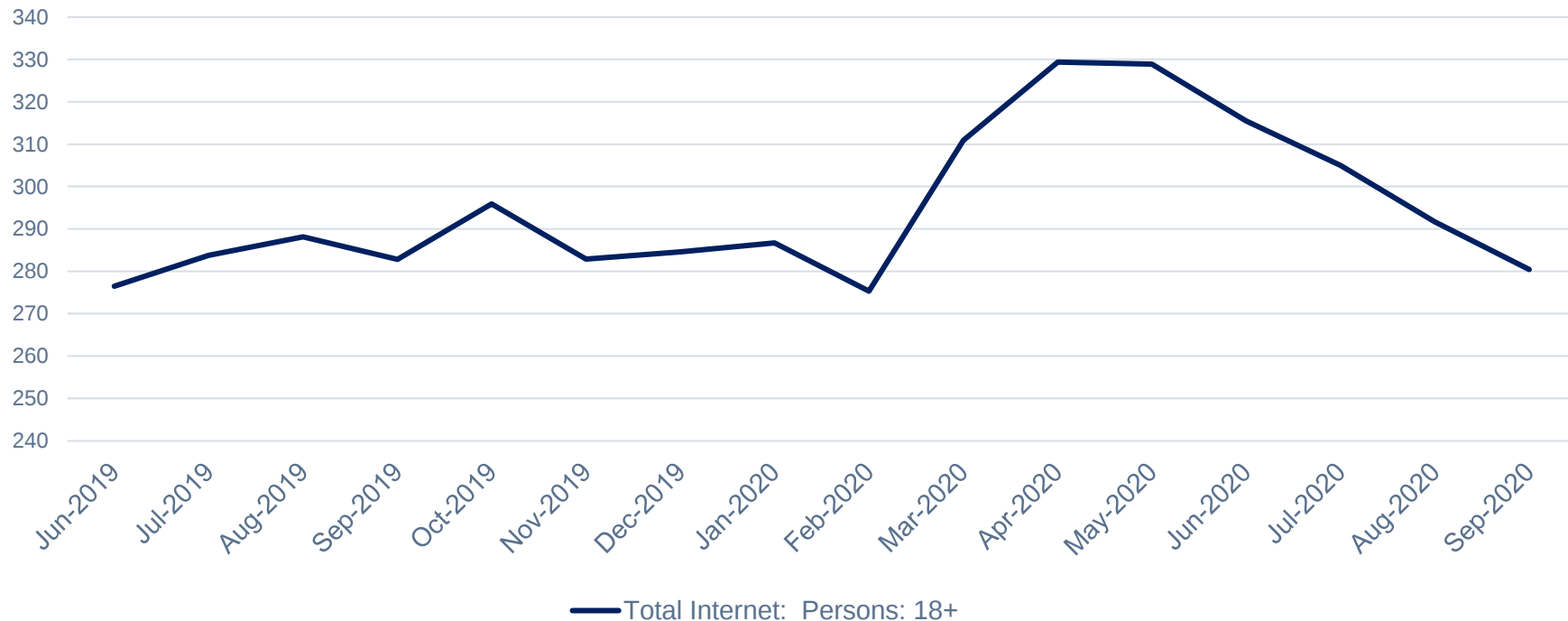


# Total minutes online (billions): Jun 19 - Sep 20

After peaking in April 2020, time online is now back to pre-pandemic levels



Minutes (billions)



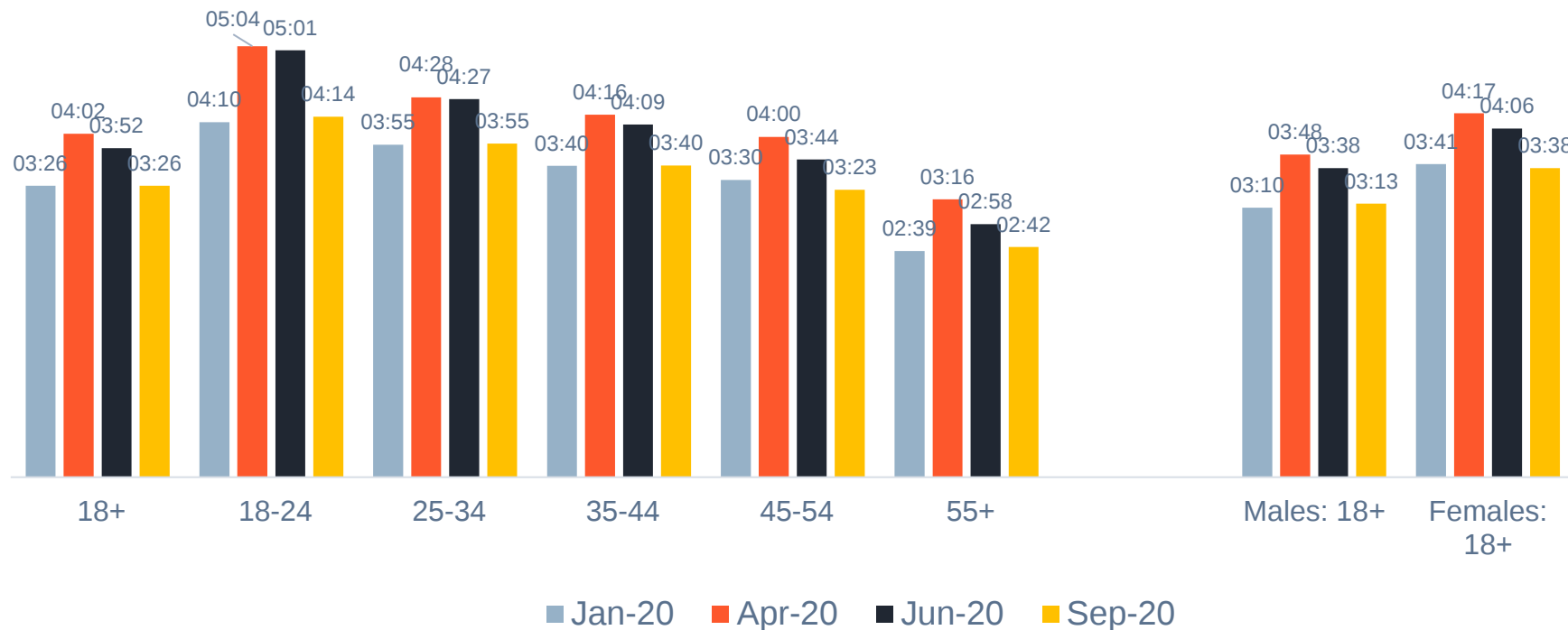
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2019 – Sep 2020, UK

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

# Average time online per day by demos (hr:min)

After reaching a peak in April, time online is back to pre-pandemic levels for all demos

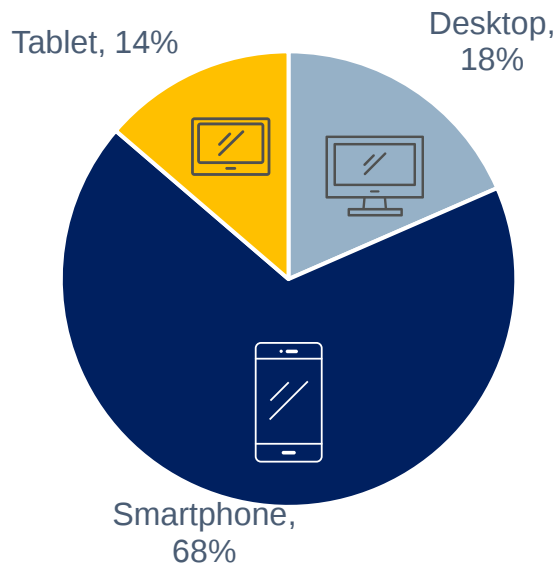


# Share of minutes by platform

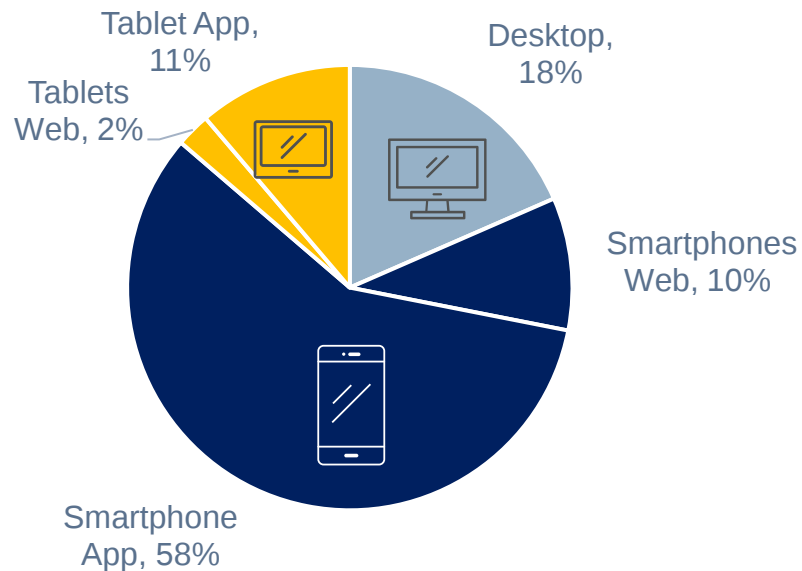
Smartphones account for 68% of time online with apps alone accounting for 58%



## By platform

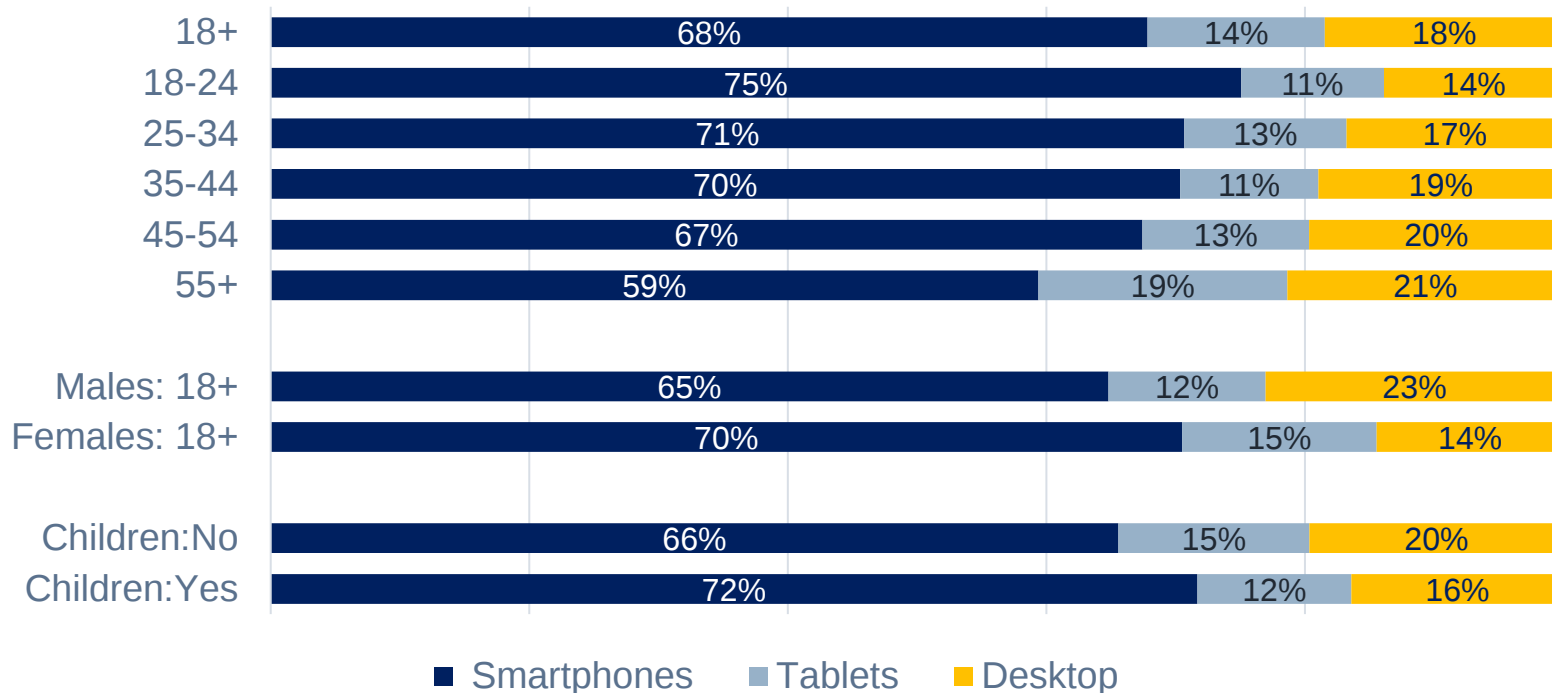


## By access type



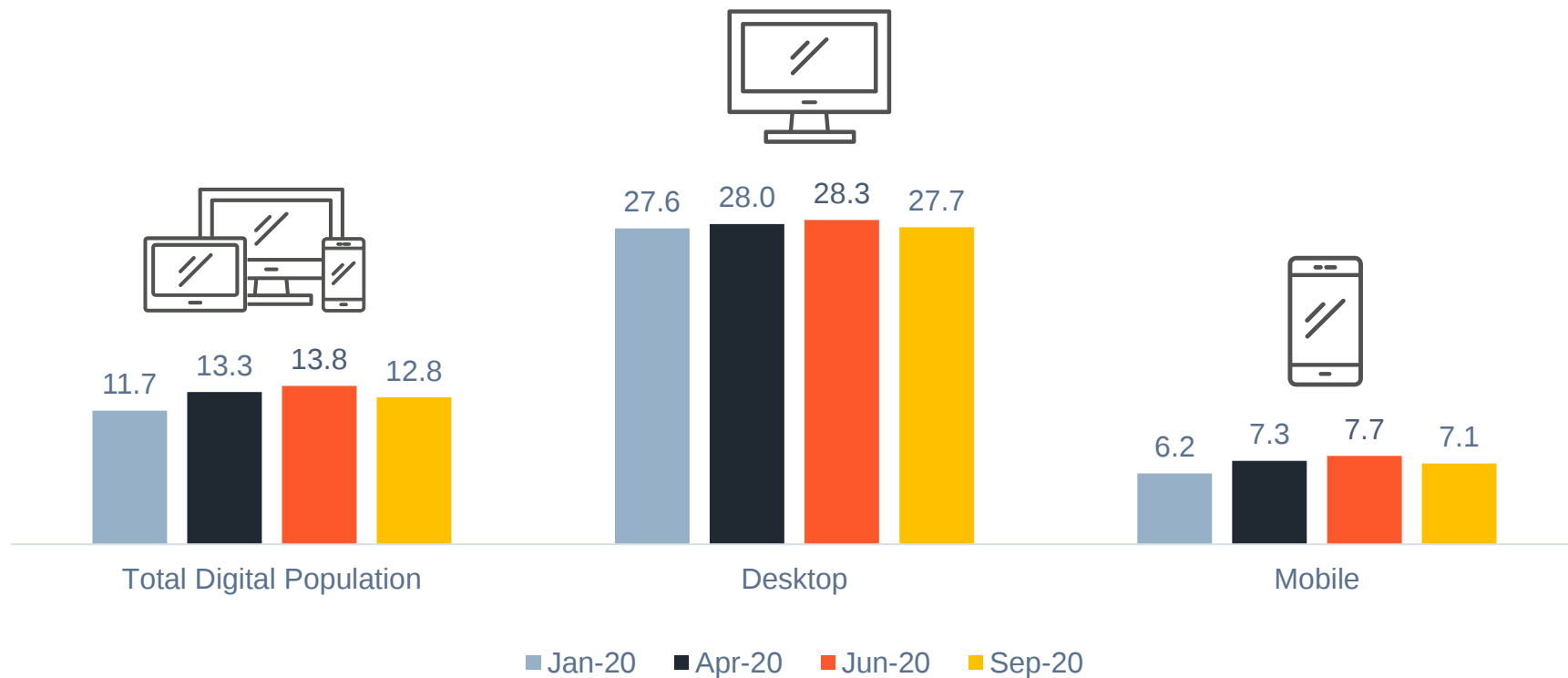
# Platform share of minutes by demographics

18-24s, females & parents spend greatest share of time on mobile devices



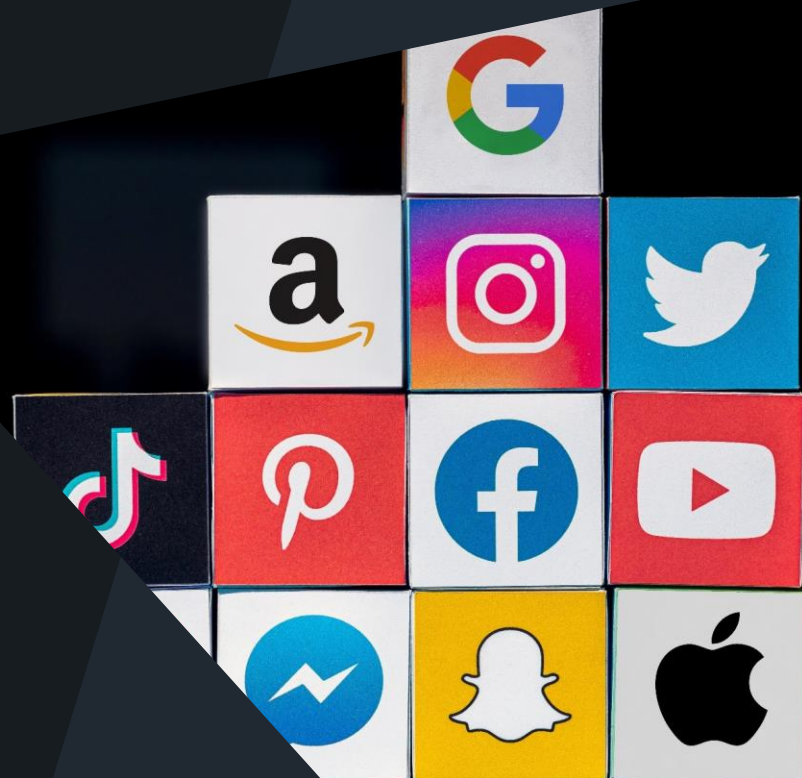
# Average minutes per visit by platform

Average visit length on desktops is 4x higher than on mobile devices



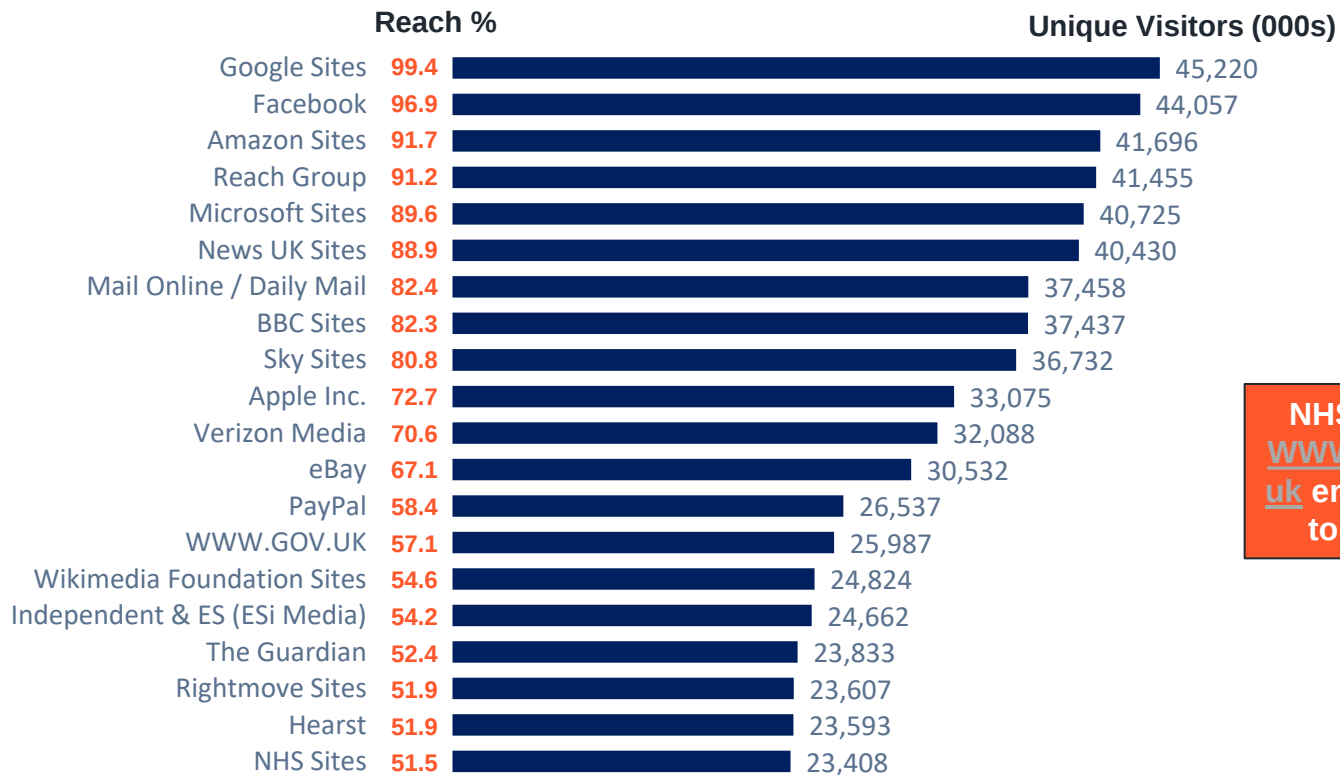
# Top Properties & Apps

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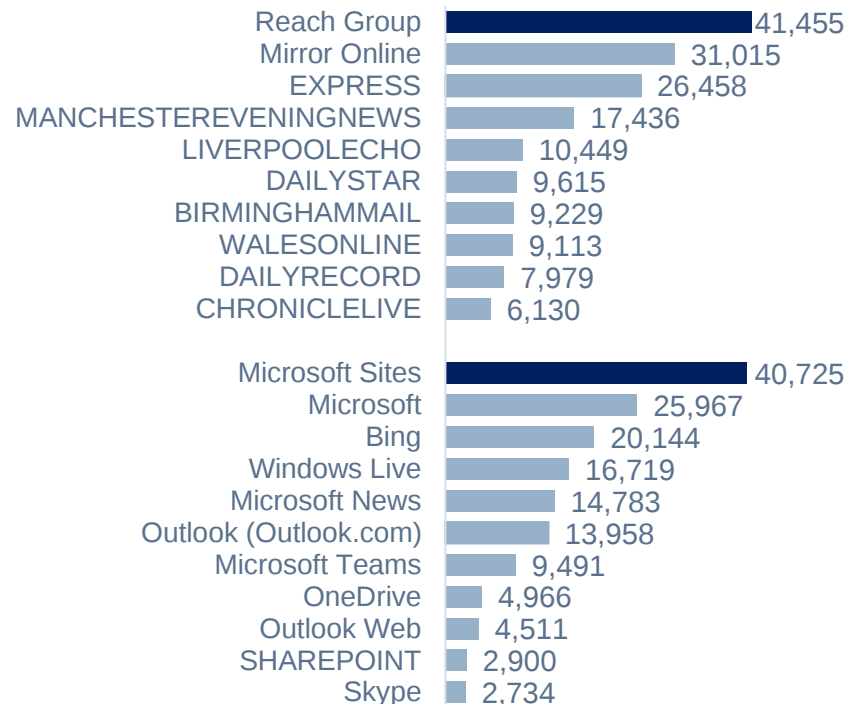
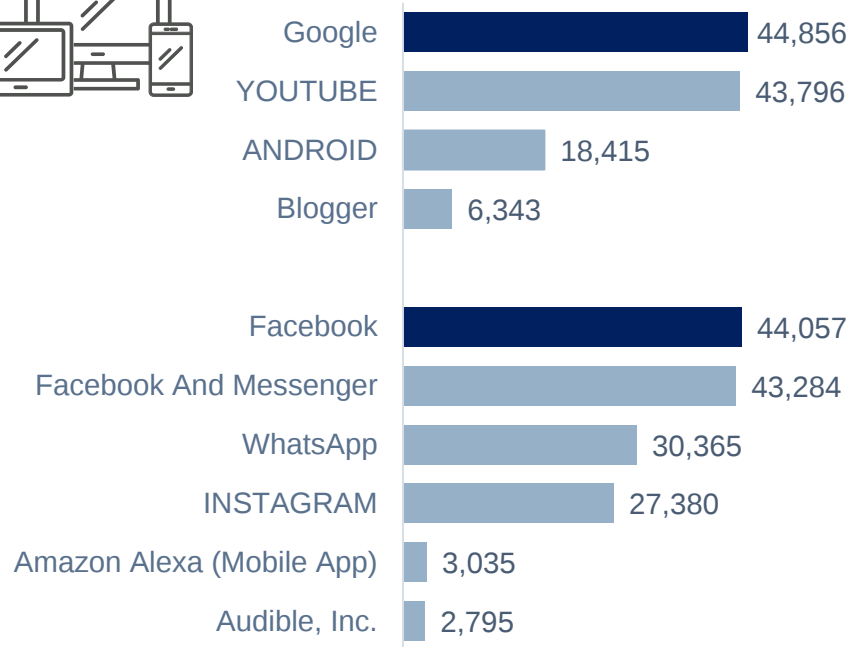
# Top 20 properties by unique visitors

The top 20 properties each reach at least 50% of the adult UK online population



NHS and  
[WWW.GOV.UK](http://WWW.GOV.UK)  
enter the  
top 20

# Audience split\* of top 5 sites – unique visitors (000s)



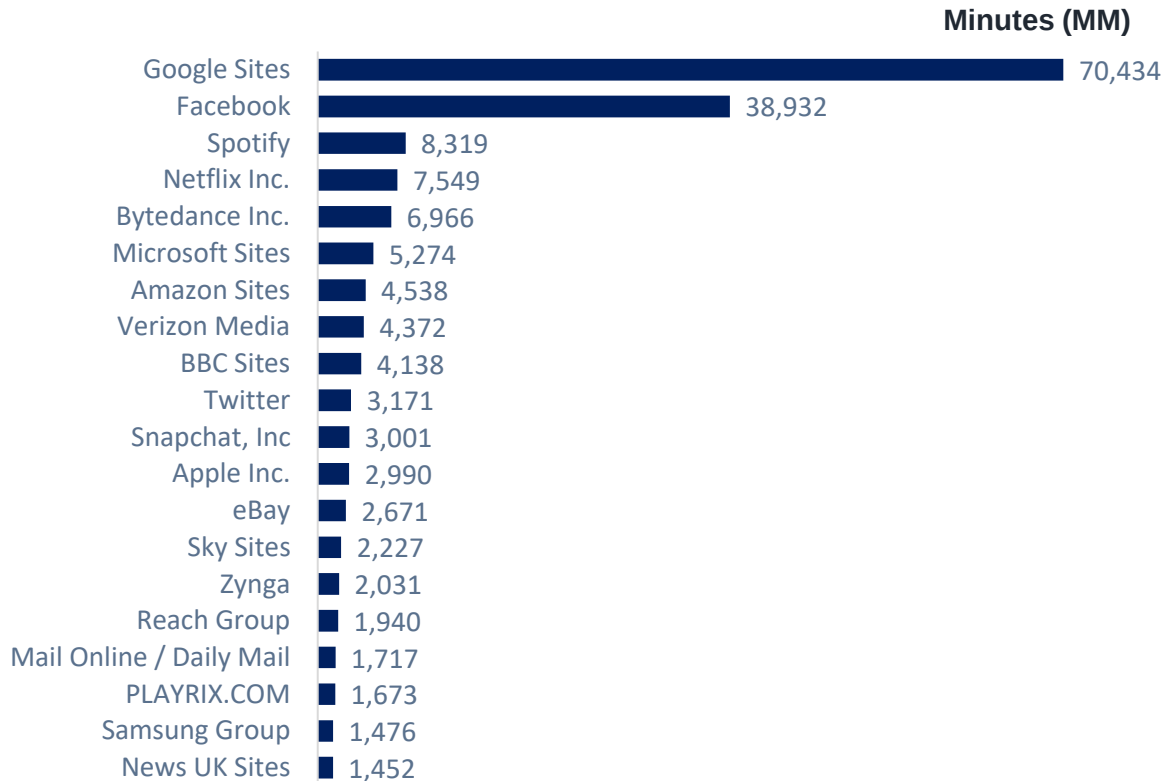
Source: Comscore MMX Multi-Platform, Adults 18+, Sep 2020, UK

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

\* Top Media Entities within the property

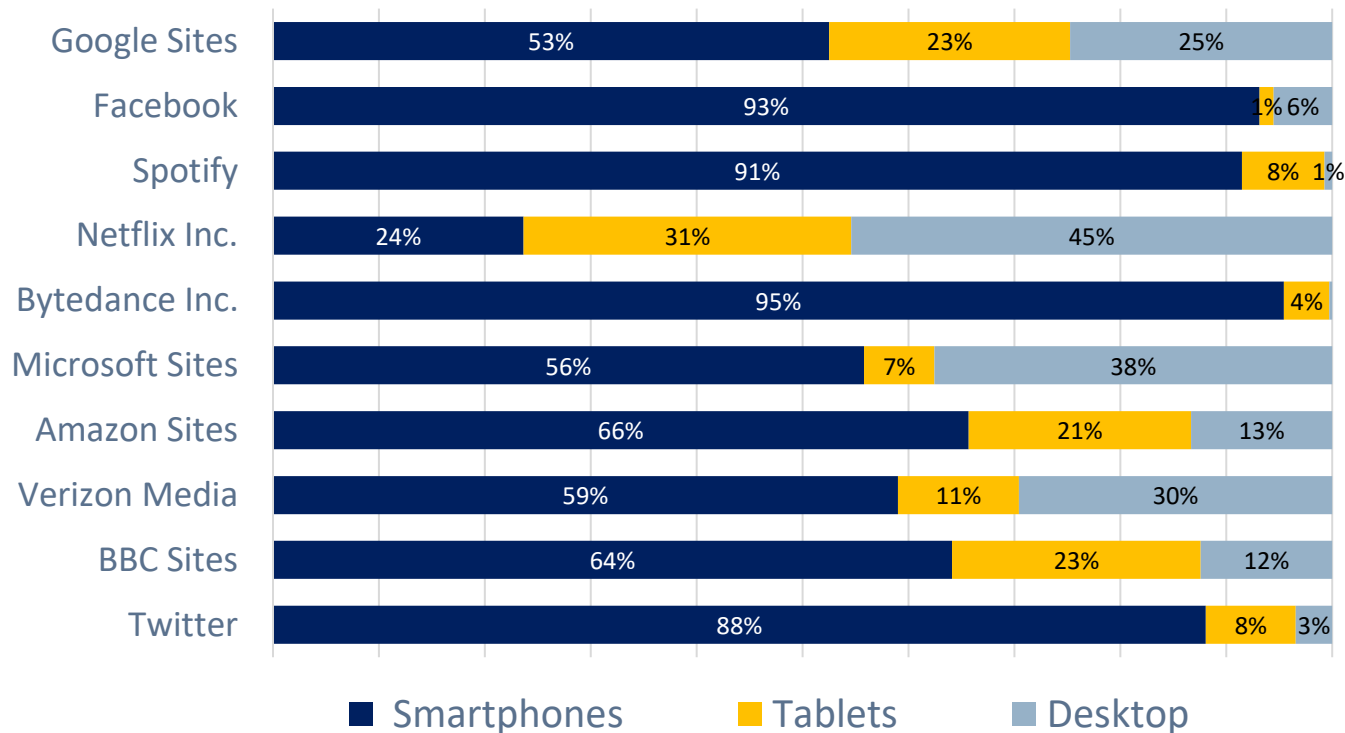
# Top 20 properties by total minutes

Bytedance, owner of TikTok now features in the Top 5



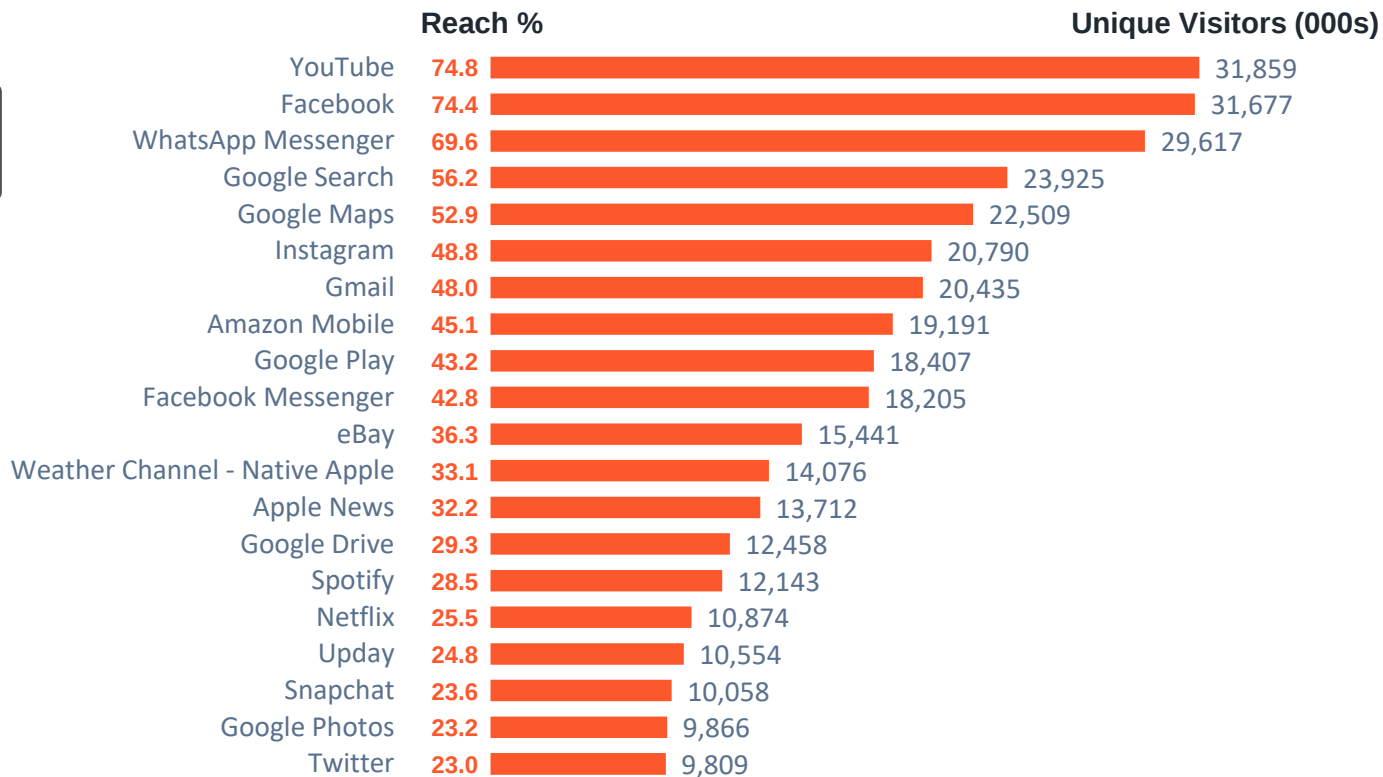
# Share of minutes by platform for top 10 'time' properties

Platform split varies among the Top 10 - Video viewing drives high tablet share



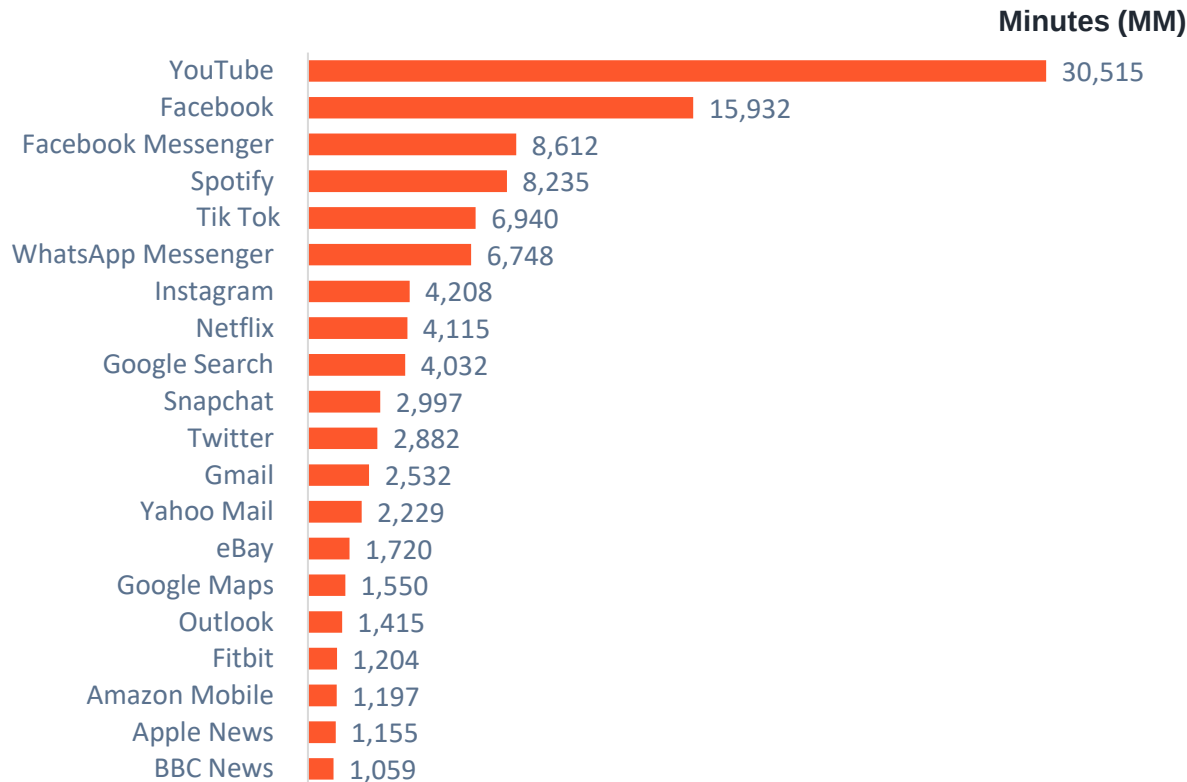
# Top 20 mobile\* apps by unique visitors

Facebook or Google own 9 of the top 10 mobile apps.



# Top 20 mobile apps by total minutes

TikTok, Spotify, Netflix and Snapchat are in the top 10 for app time.





# Category usage

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# Platform share of time online by category

Platform time is influenced heavily by content and service



Desktop total

18%



Smartphone total

68%



Tablet total

14%

|                               |     |
|-------------------------------|-----|
| Computer Software             | 91% |
| Training/Higher Advancement   | 78% |
| Retail - Music                | 72% |
| Education - Information       | 70% |
| Family & Youth Education      | 66% |
| Investments                   | 63% |
| Gaming Information            | 61% |
| Auctions                      | 60% |
| Autos Manufacturer            | 58% |
| Entertainment - Movies        | 54% |
| Retail - Movies               | 50% |
| Education                     | 48% |
| Autos - Information/Resources | 47% |
| Politics                      | 46% |
| Automotive Total              | 44% |

|                                 |     |
|---------------------------------|-----|
| Instant Messenger               | 99% |
| Diet & Exercise/Fitness Tracker | 98% |
| Car Transportation              | 97% |
| Job Search                      | 96% |
| Gay/Lesbian                     | 95% |
| Maps/GPS/Traffic                | 95% |
| Health                          | 94% |
| Teens                           | 93% |
| Consumer Electronics            | 93% |
| Social Media                    | 93% |
| Payments                        | 92% |
| Social Networking               | 91% |
| Dating                          | 90% |
| Religion/Spirituality           | 88% |
| Weather                         | 87% |

|                             |     |
|-----------------------------|-----|
| Kids                        | 44% |
| Family & Youth              | 38% |
| Entertainment               | 26% |
| Games                       | 21% |
| Search/Navigation           | 19% |
| General News                | 19% |
| Technology                  | 17% |
| Online Gaming               | 17% |
| News/Information            | 16% |
| Books                       | 16% |
| e-cards                     | 16% |
| Local News                  | 16% |
| Hotel/Resort & Home Sharing | 14% |
| Department Stores/Malls     | 14% |
| Online Travel Agents        | 14% |

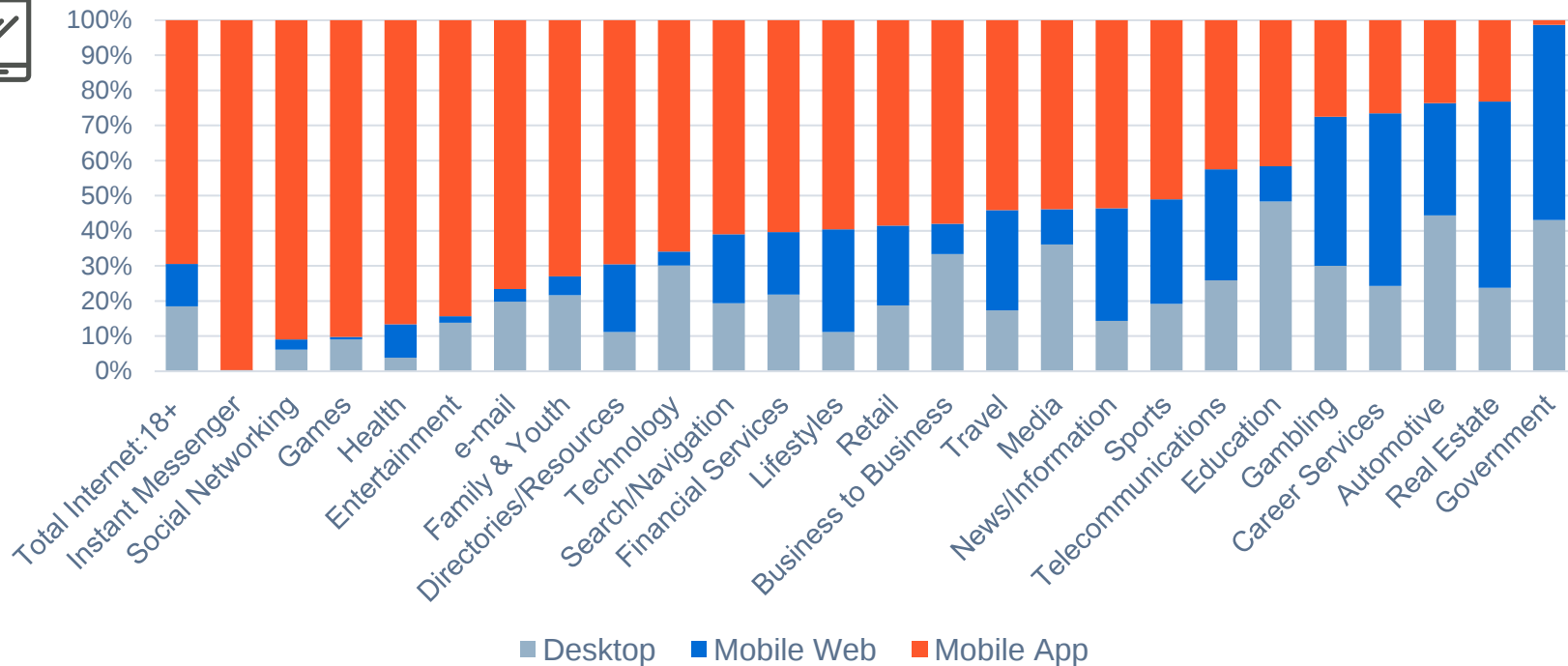
# Share of mobile minutes by access type by category



Mobile App share of minutes varies by content & service



Desktop, Mobile Web and Mobile App Share of Minutes (%)





# Category Change

Key changes: Jun-Sep 2020

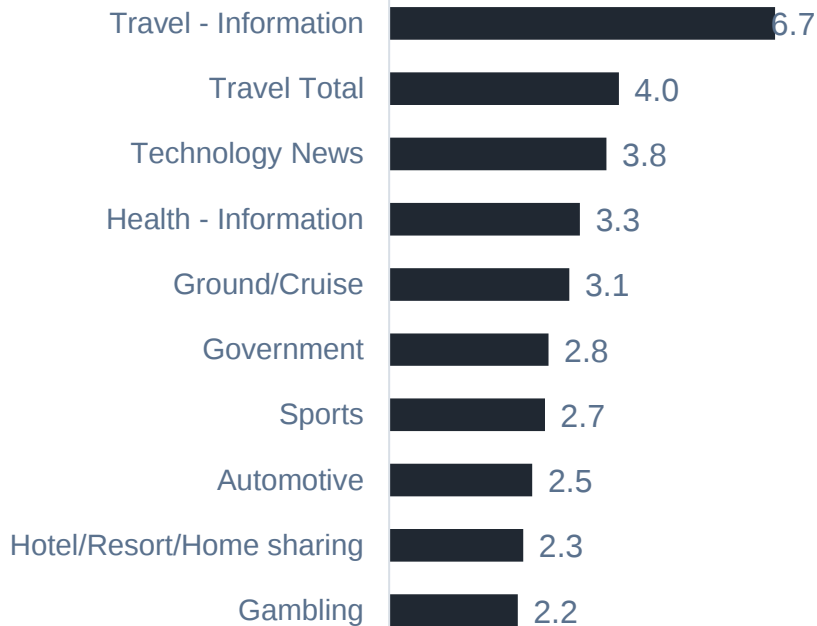


# Categories adding/losing most unique visitors: Jun-Sep

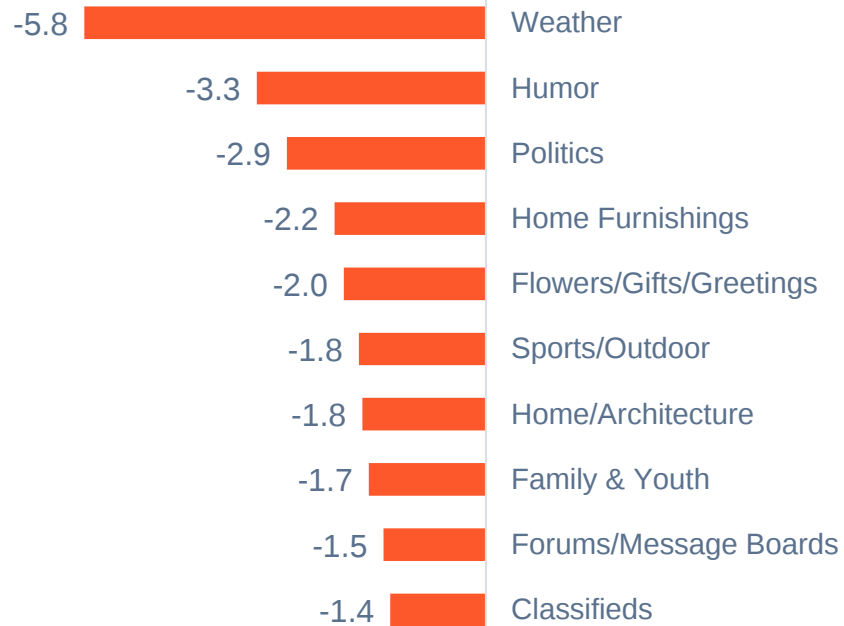
Travel, Health, Sports, Tech news and Government have made most gains since June



## Unique Visitors Gained (Millions)



## Unique Visitors Lost (Millions)



# Top Growth Properties & Mobile Apps

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Jun-Sep 2020

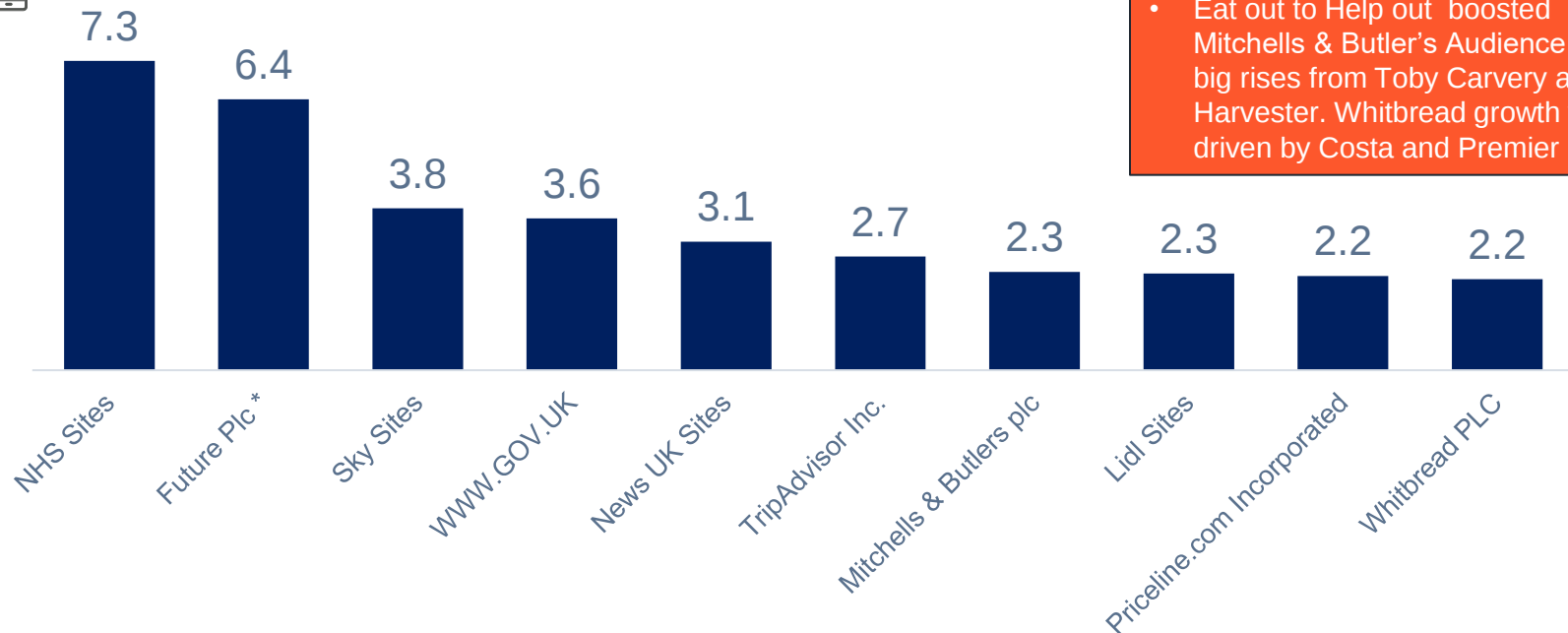


# Properties adding MOST visitors: Jun-Sep 20

NHS, Government and Sky have seen the biggest uplifts since June



Additional 18+ Unique Visitors (Millions): Jun to Sep 2020



Source: Comscore MMX Multi-Platform, Adults 18+, Jun – Sep 2020, UK

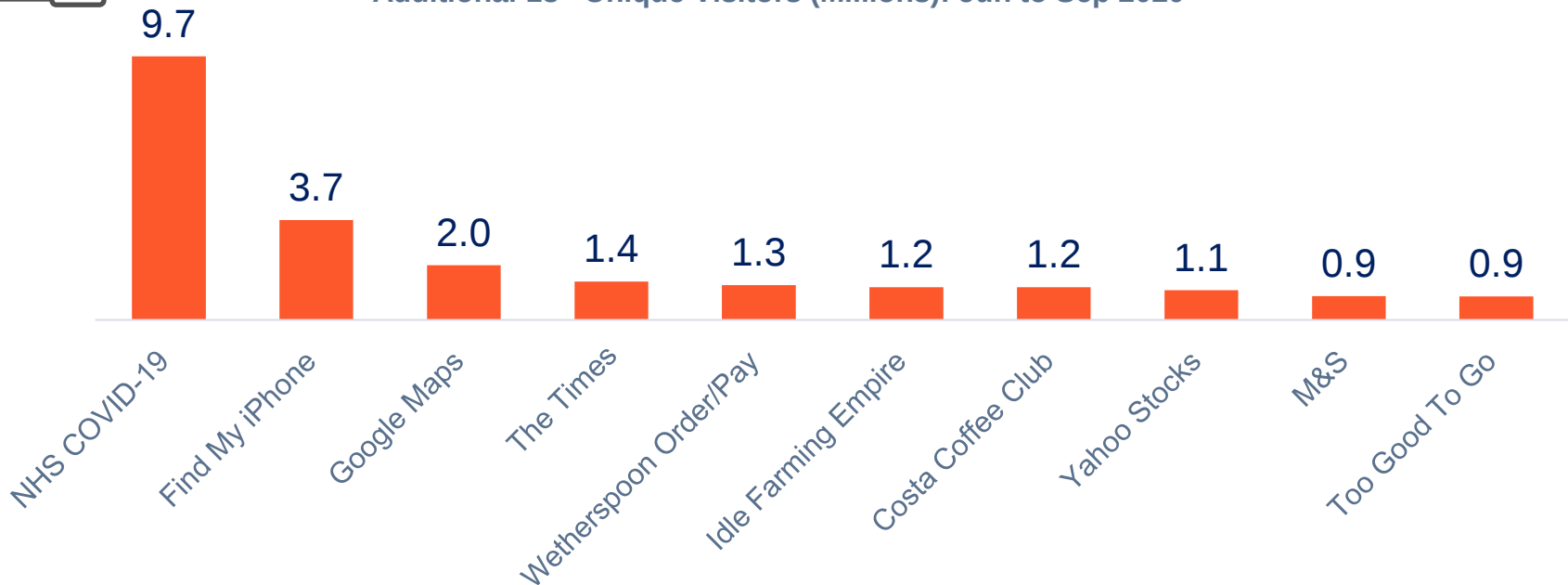
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

\* Future Publishing uplift is a result of inclusion of Ti Media from July 2020

# Mobile apps adding MOST visitors: Jun-Sep 20



Additional 18+ Unique Visitors (Millions): Jun to Sep 2020

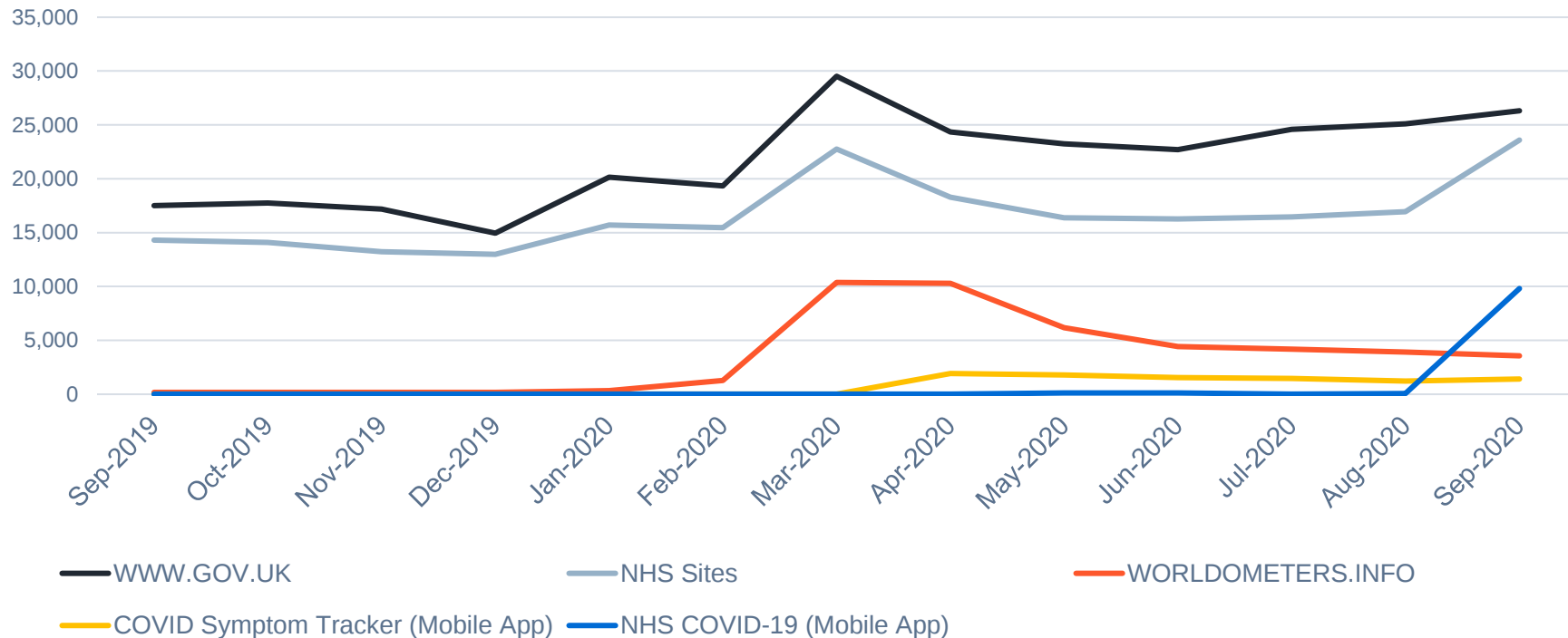


# Total Unique Visitors : Jun 19 - Sep 20

NHS visitors have surpassed the March peak as people download the NHS Covid-19 app



Unique visitors (000s)



comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2019 – Sep 2020, UK

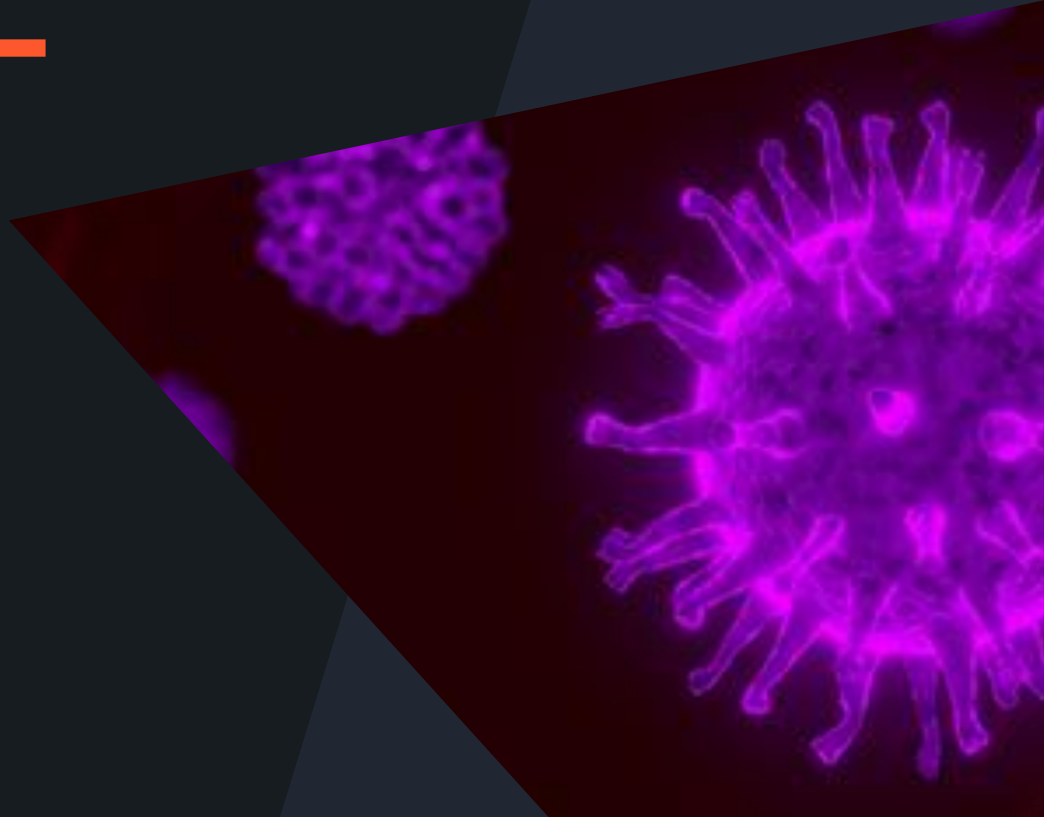
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

# Impact of Covid-19 on UK online Usage

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September update



# Categories which experienced growth\* during the 1<sup>st</sup> covid lockdown months of March and April

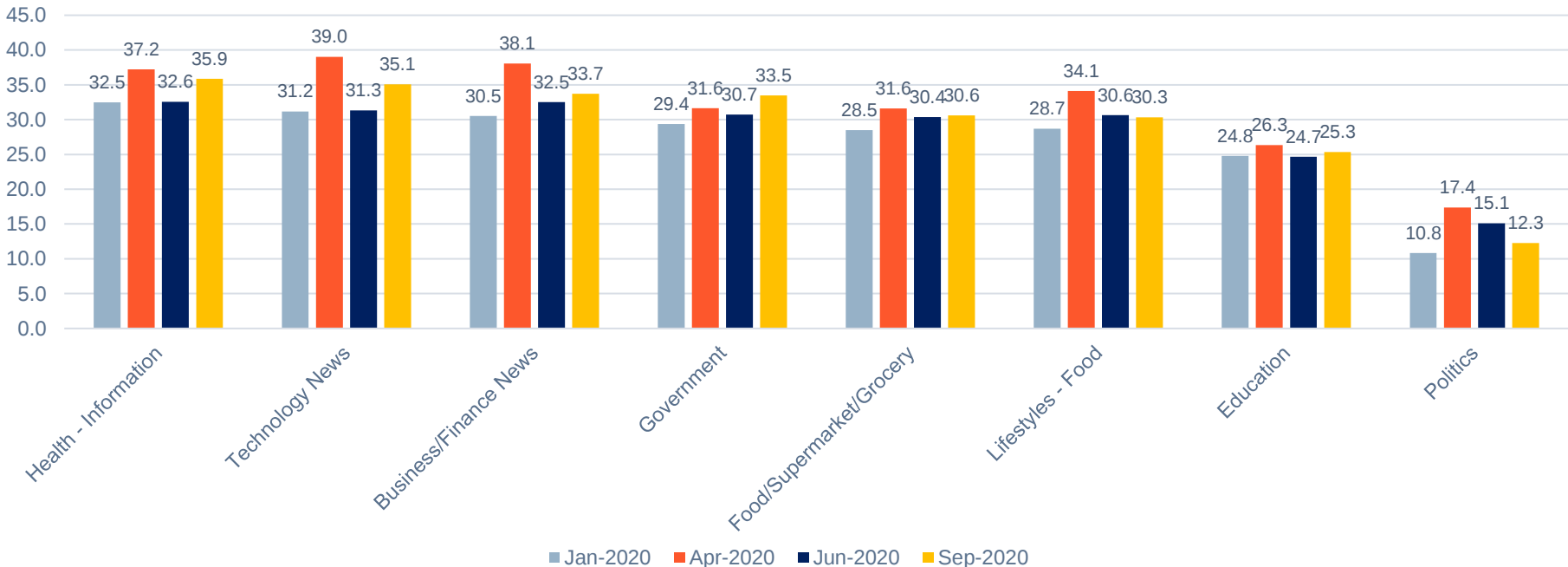


# Unique visitor trend for 'covid growth' categories

Several categories which experienced big audience increases in April are showing new uplifts



Unique visitors (millions)

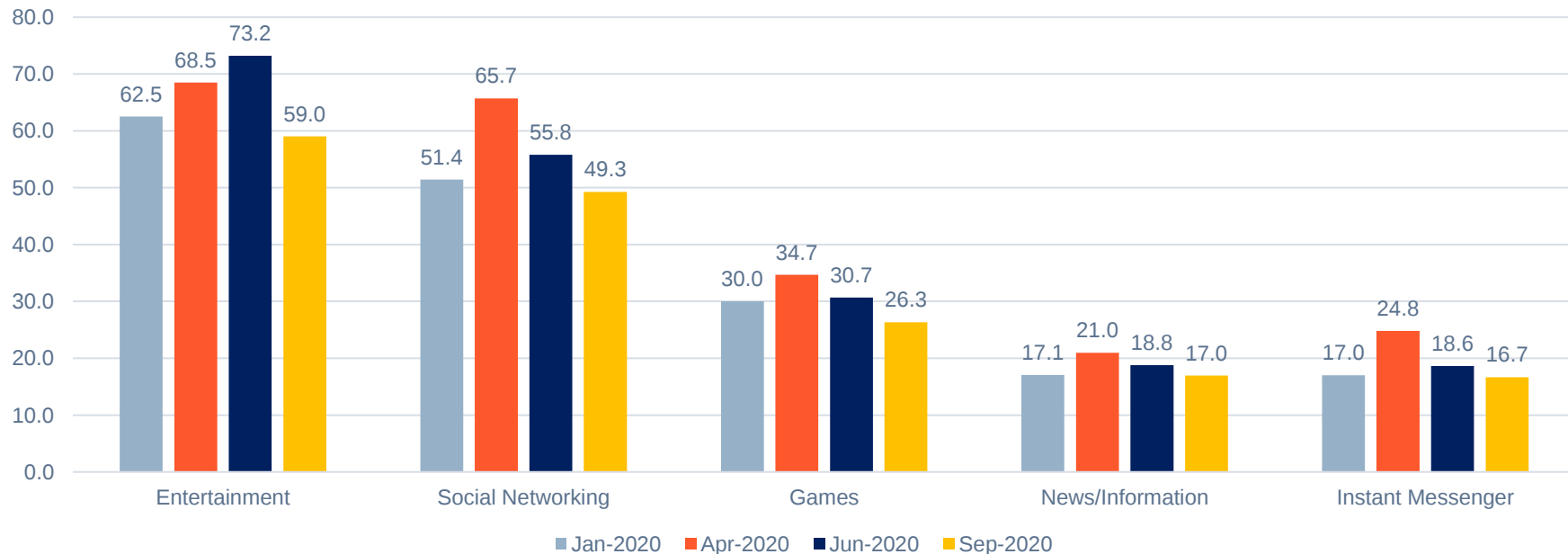


# Minutes trend for 'covid time growth' categories

Time online categories continued to decline after the first lockdown ended



Total monthly minutes (bn)



# Categories which experienced declines\* during the 1<sup>st</sup> covid lockdown months of March and April

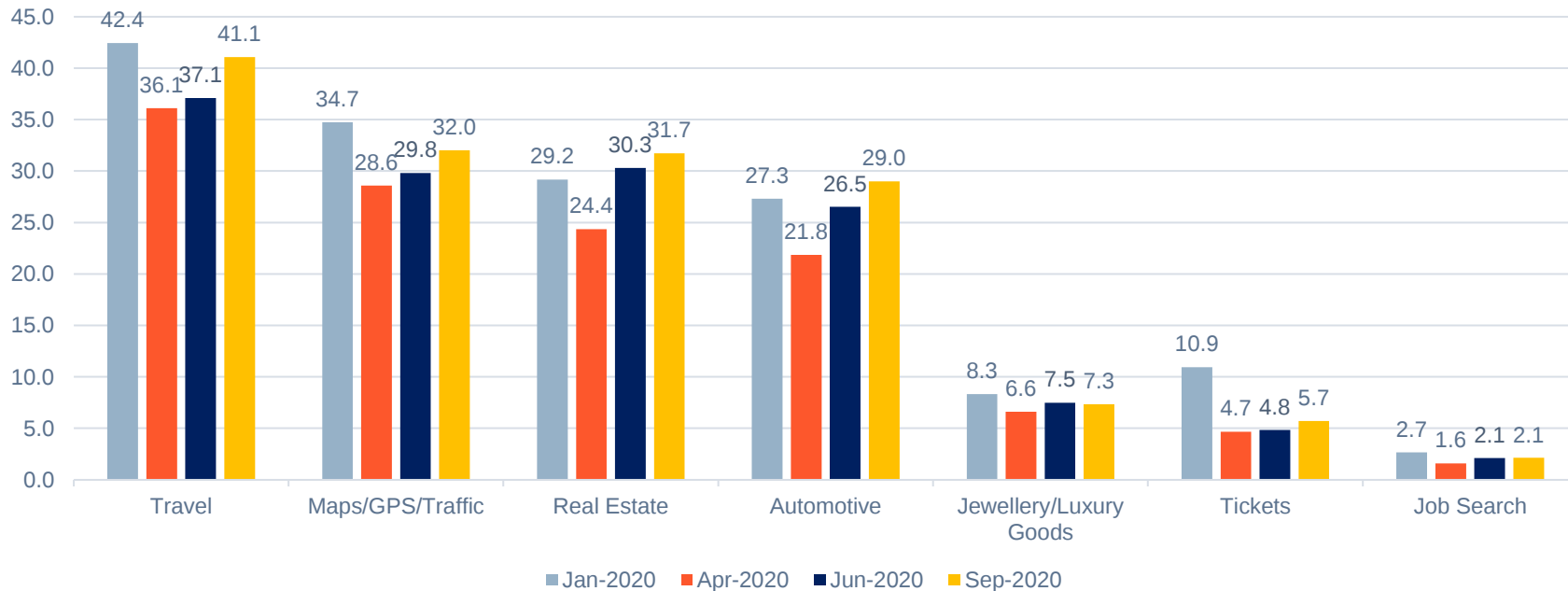


# Unique visitor trend for 'covid decline' categories

Travel, Real Estate and Automotive are back to pre-Covid audience levels



Unique visitors (millions)



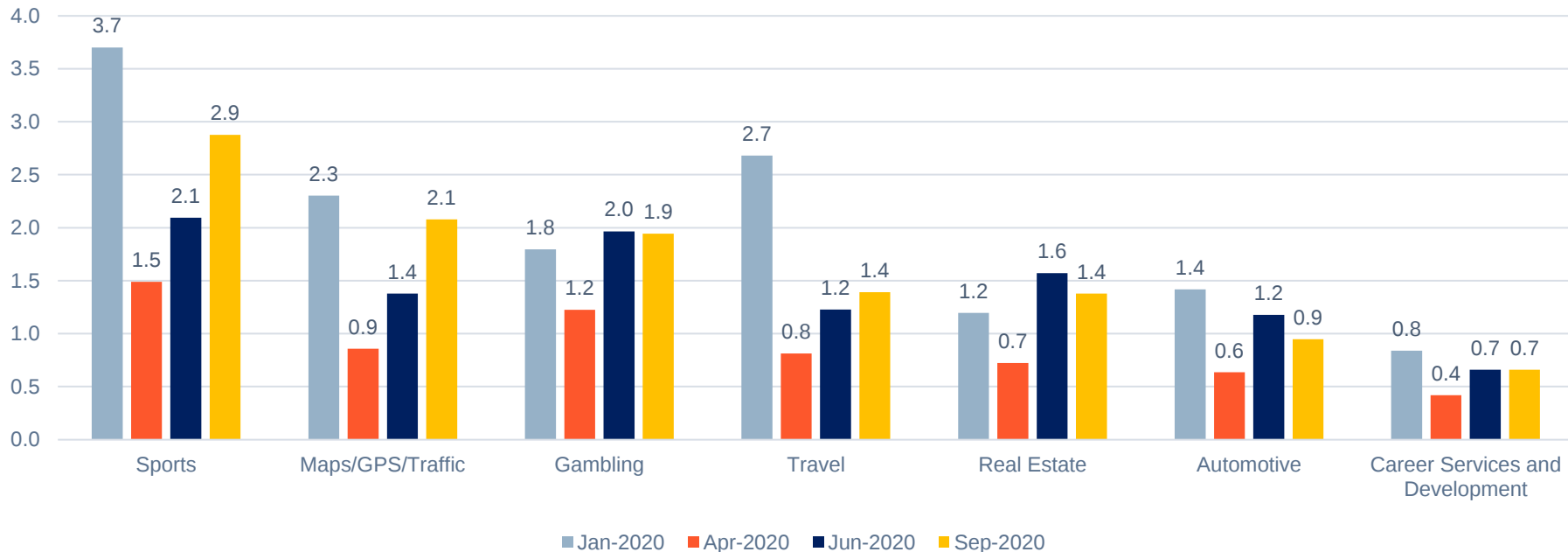
# Minutes trend for 'covid time decline' categories



Time Online is also recovering for those categories that suffered most during April



Total monthly minutes (bn)



# Questions?



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

# 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.

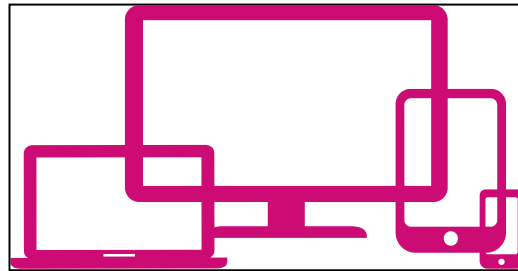
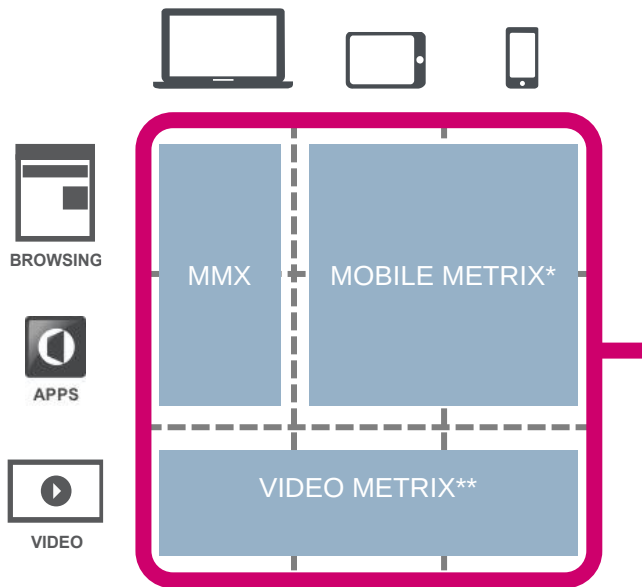
**Find out more at:**

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

# Guide to Data Sources



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



**Comscore MMX  
Multi-Platform®**