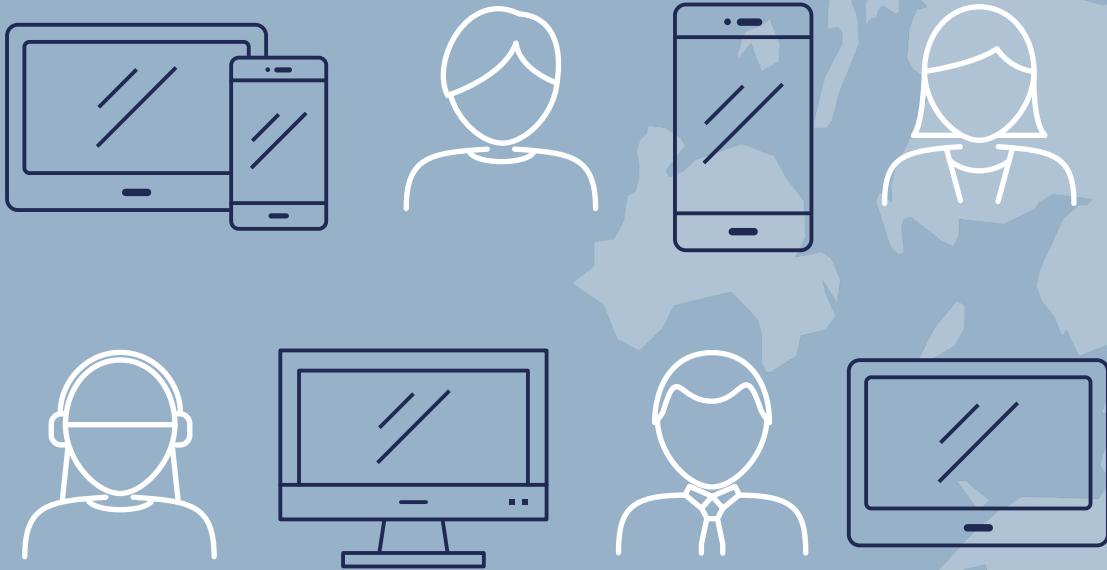


UK Digital Market Overview Summary Dec 2017



A presentation to
IAB Mobile Steering
Group January 2018

If you have any questions, please
contact: insights@ukom.uk.net

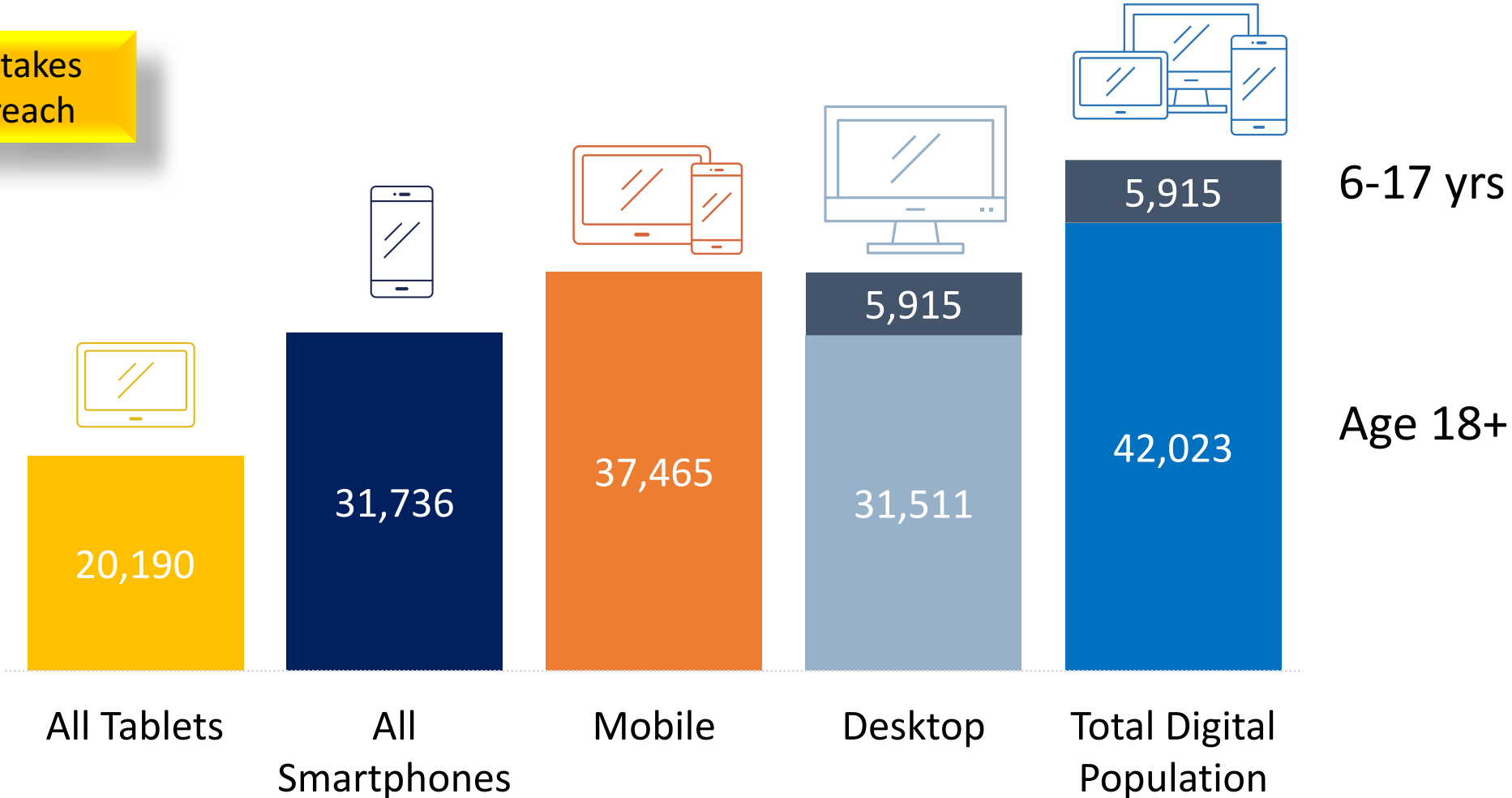


Usage by Platform

Breakdown of Digital Unique Visitors by Platform

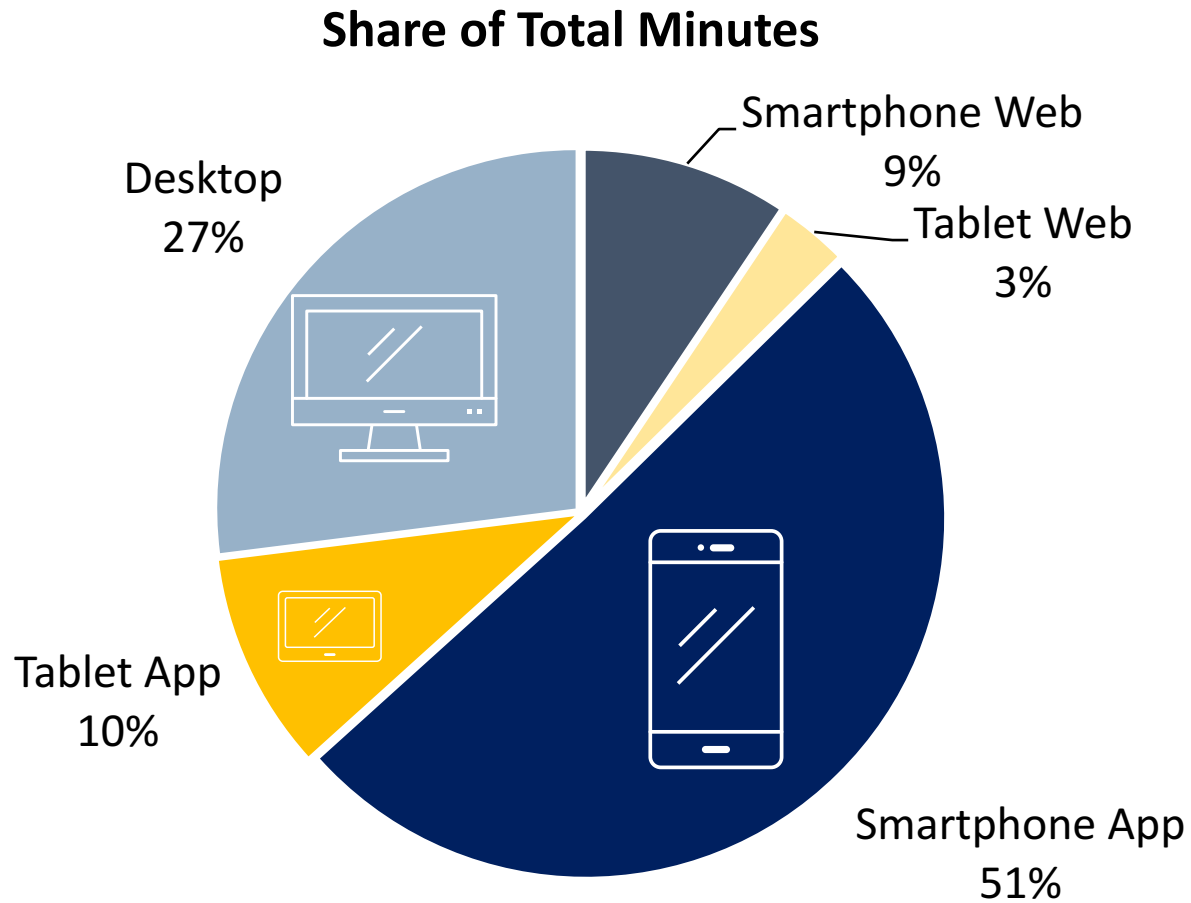
Smartphone overtakes desktop for 18+ reach

Total Unique Visitors (000s)



Share of Minutes by Platform & Mobile Access

Mobile Apps account for 61% of all Minutes



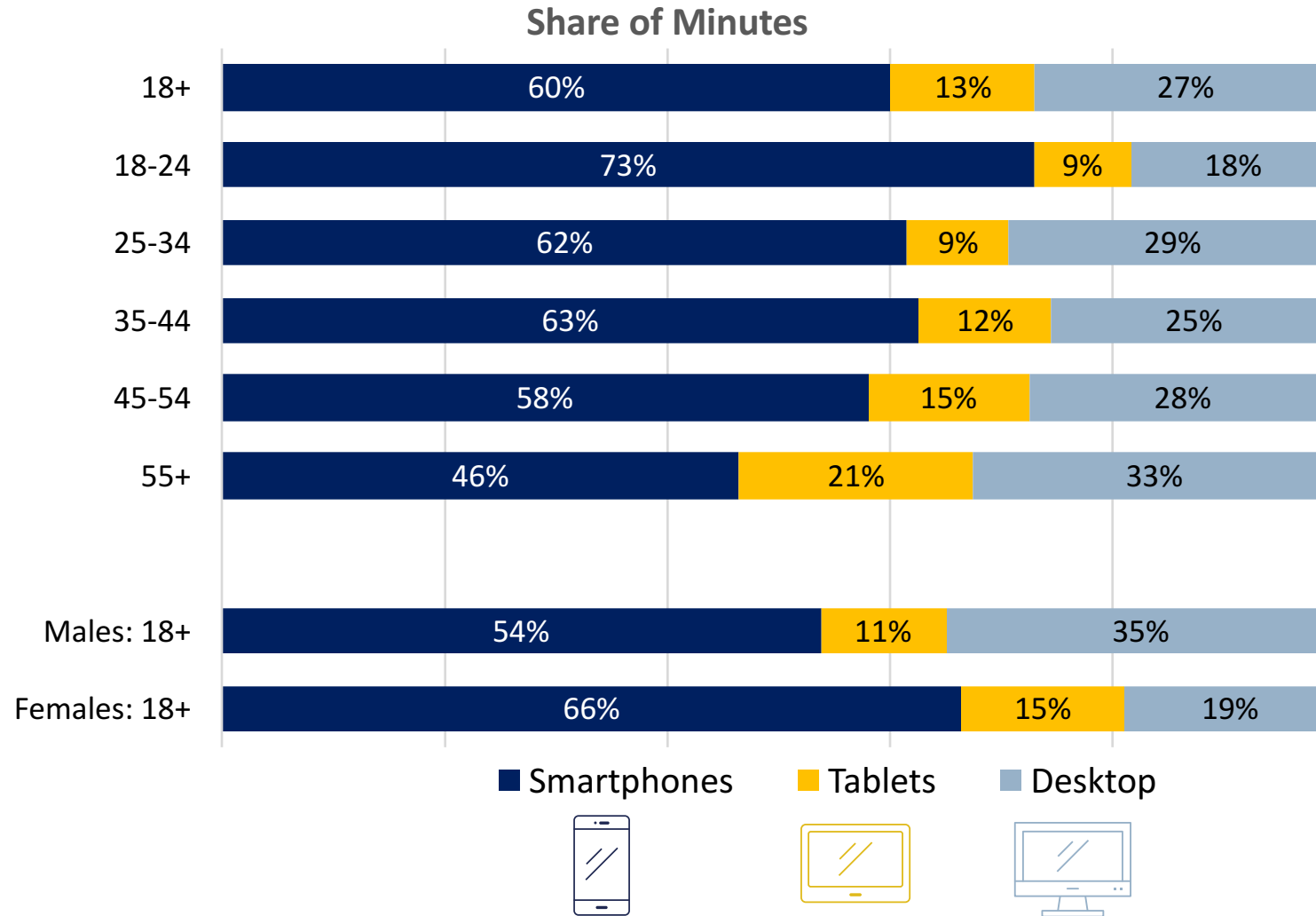
Mobile accounts for 73% of time spent online

Smartphone accounts for 60% of time online

Apps account for 83% of total mobile minutes

Platform Share of Minutes by Age & Gender

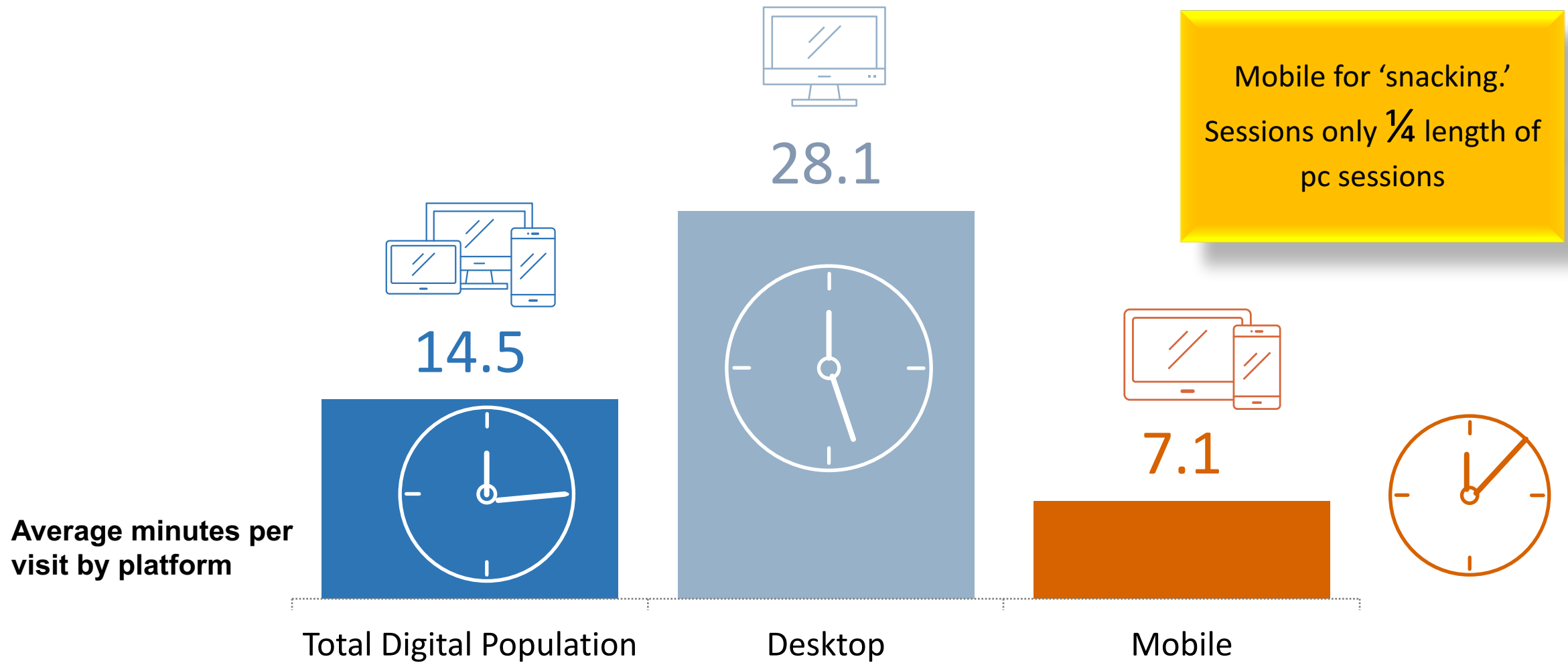
Millennials & females spend greatest share of time on mobile devices



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.

Average Minutes per Visit by Platform



Average minutes per visit by platform



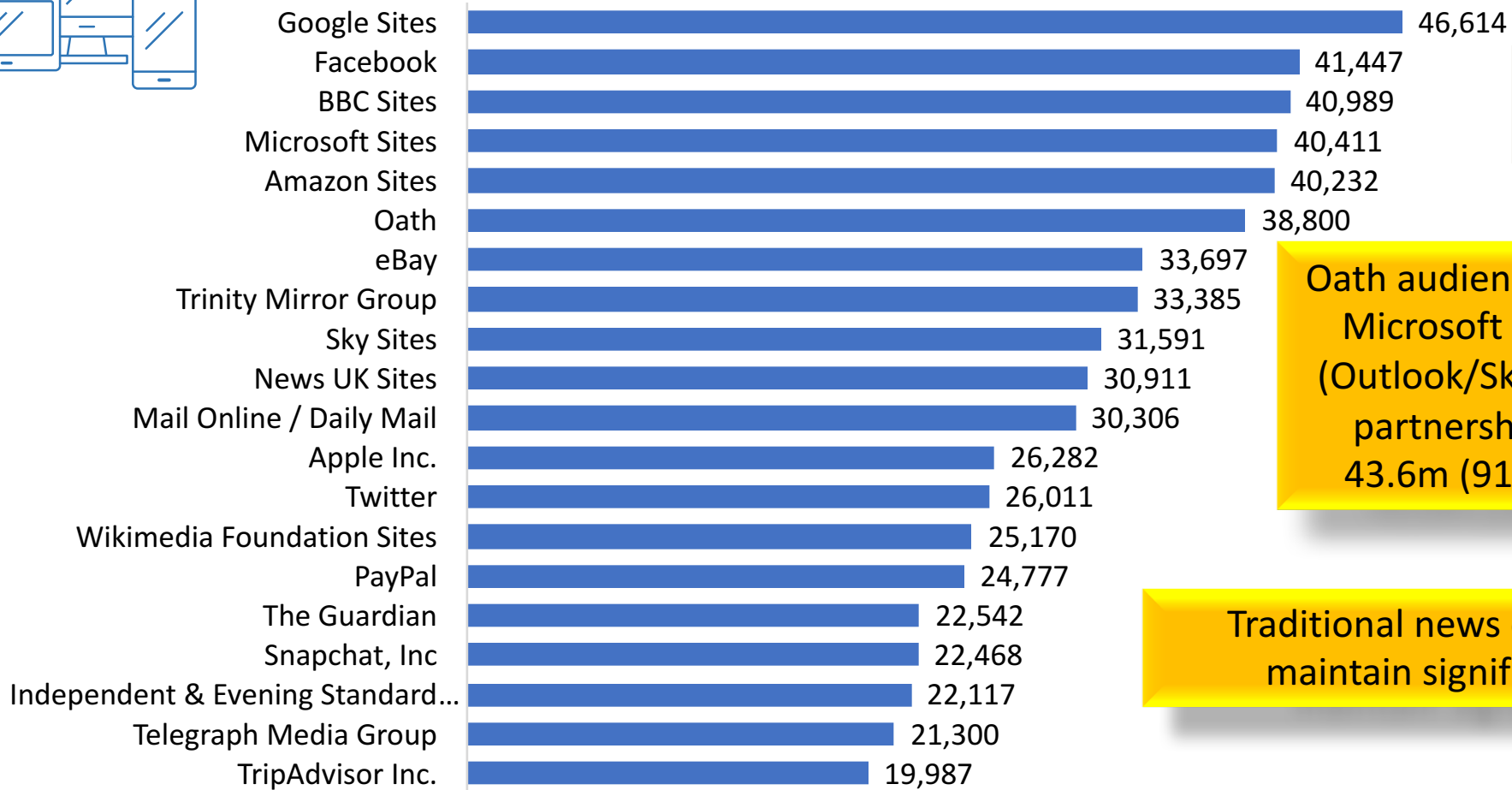
Top Properties: Total Digital Population

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

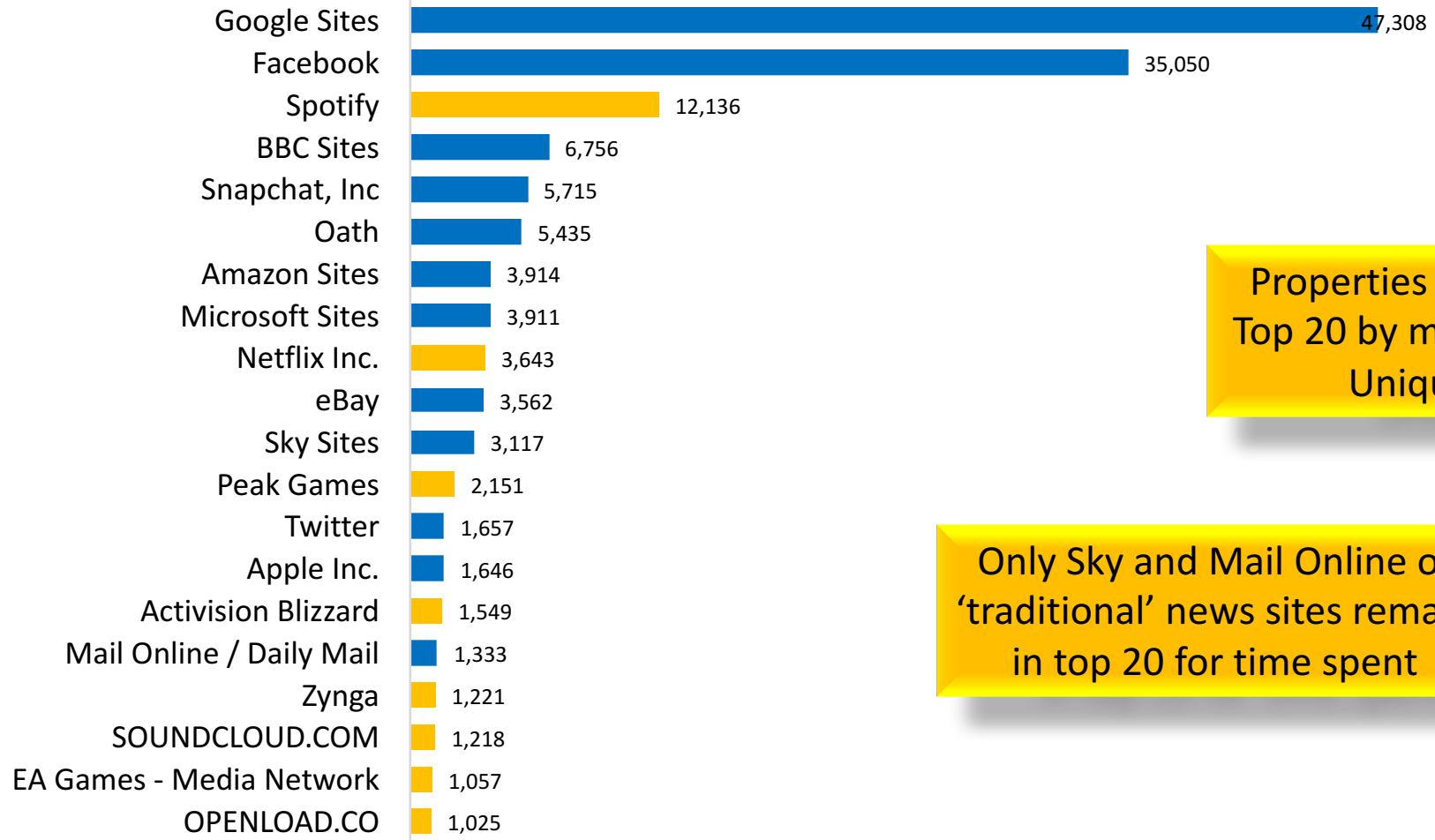
Traditional news organisations maintain significant reach

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

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



Total Mins (MM) – Total Market = 232,600



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

Only Sky and Mail Online of 'traditional' news sites remain in top 20 for time spent



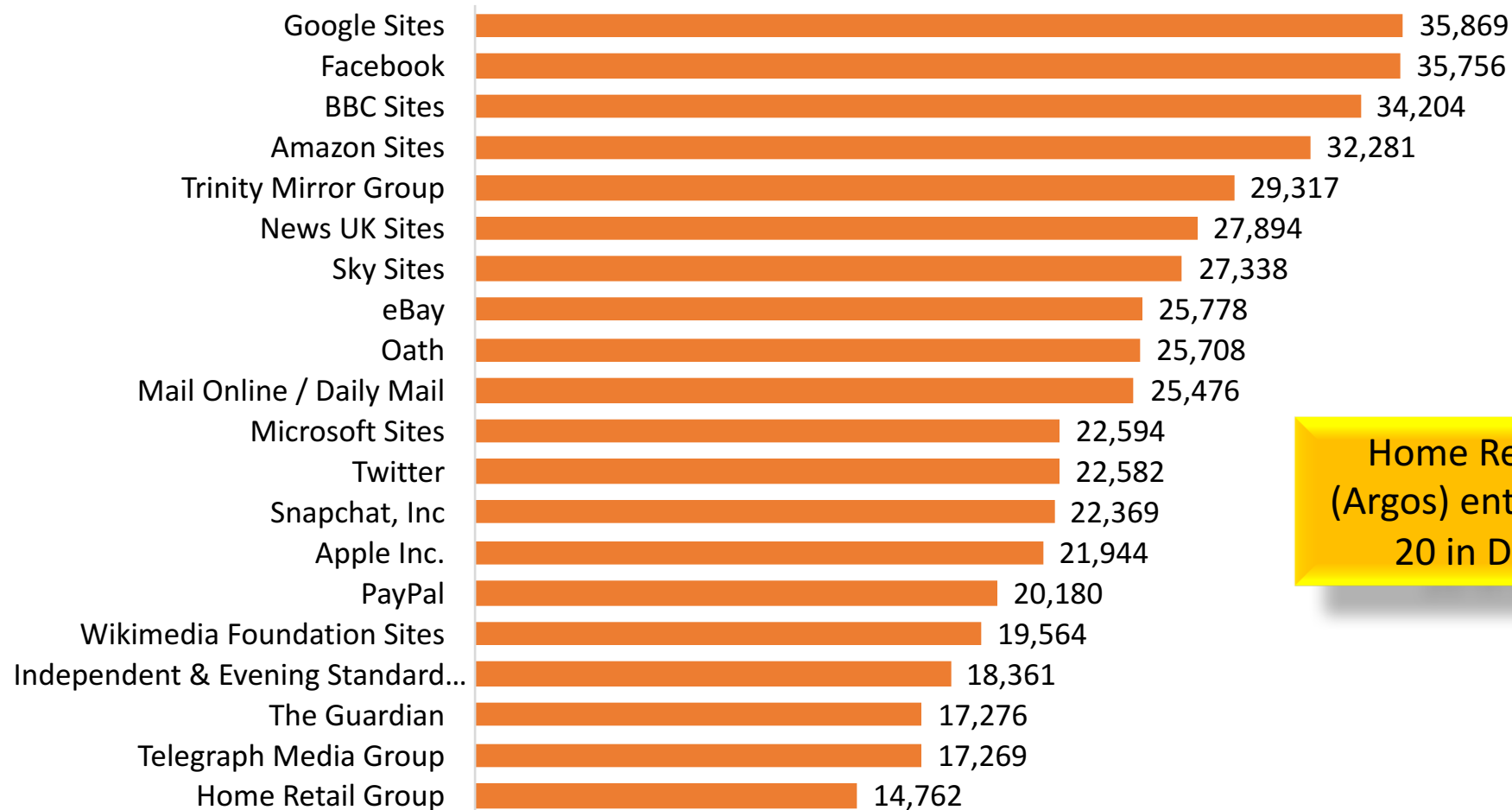
Top Properties: Mobile Population

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



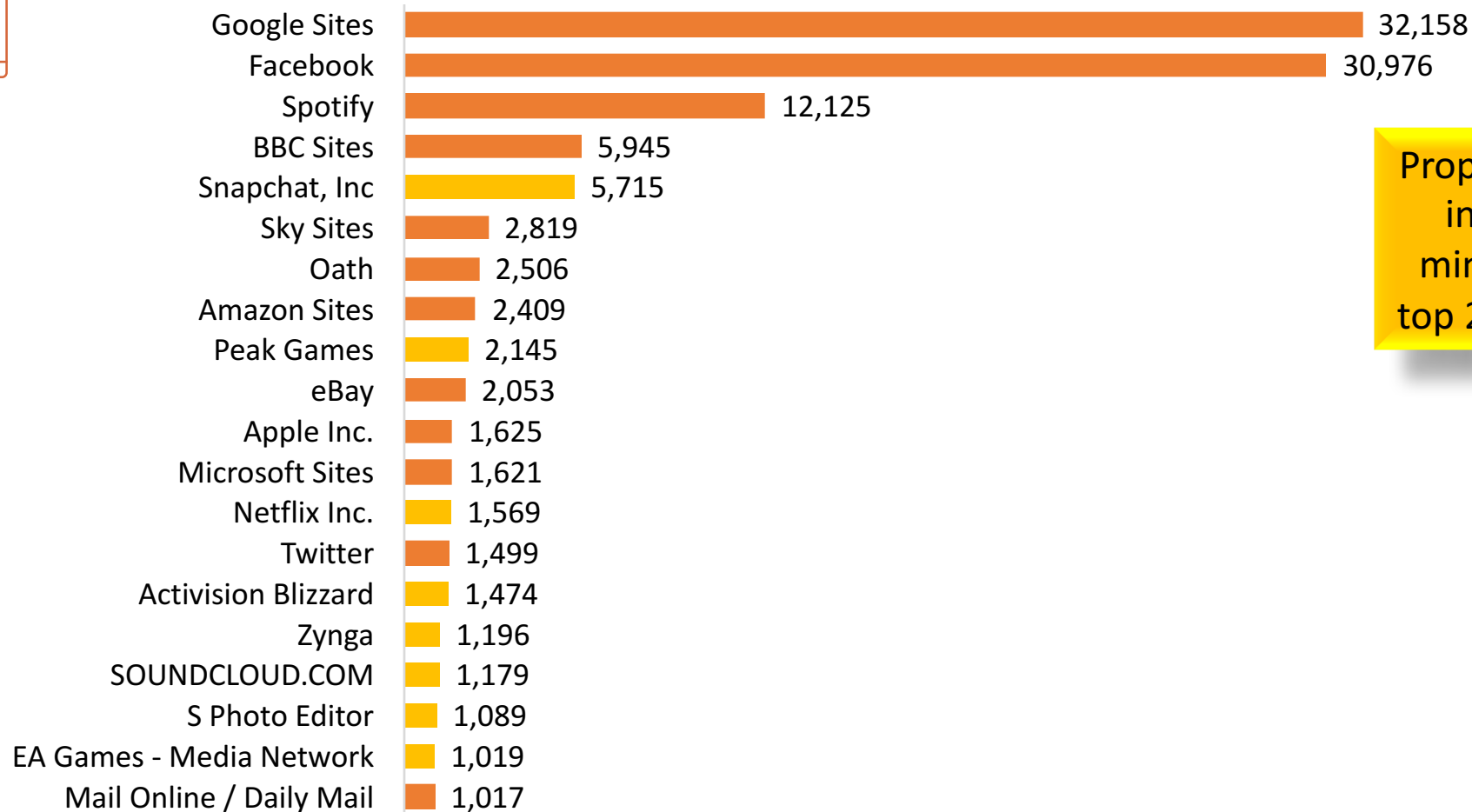
Home Retail Group
(Argos) entered the top
20 in December

Top 20 Mobile Properties ranked by minutes

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



Minutes (MM) – Total Mobile = 169,824



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



Content categories

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+

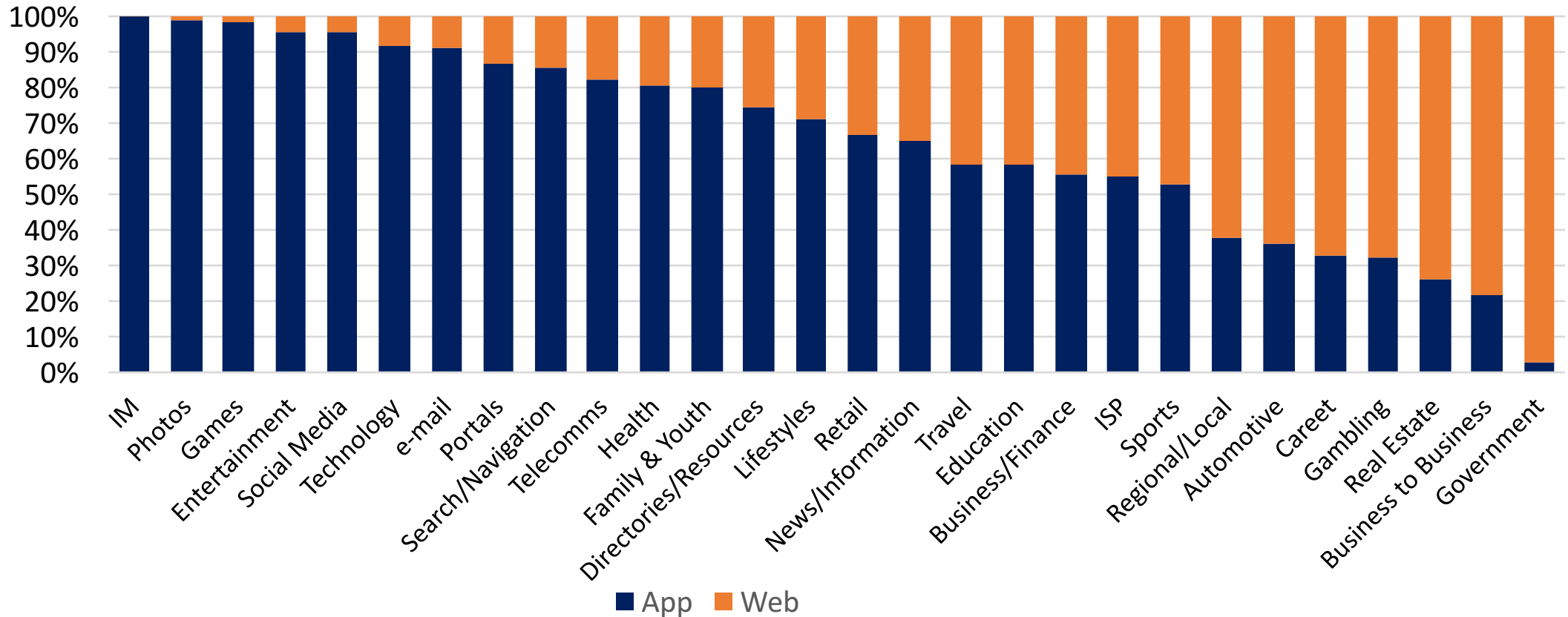
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

Share of Mobile Minutes by Access Type by Category

Mobile App share of minutes varies by content & service



Mobile App V Mobile Web Share of Mobile Minutes



YouTube Data from comScore Video Metrix Multi-Platform

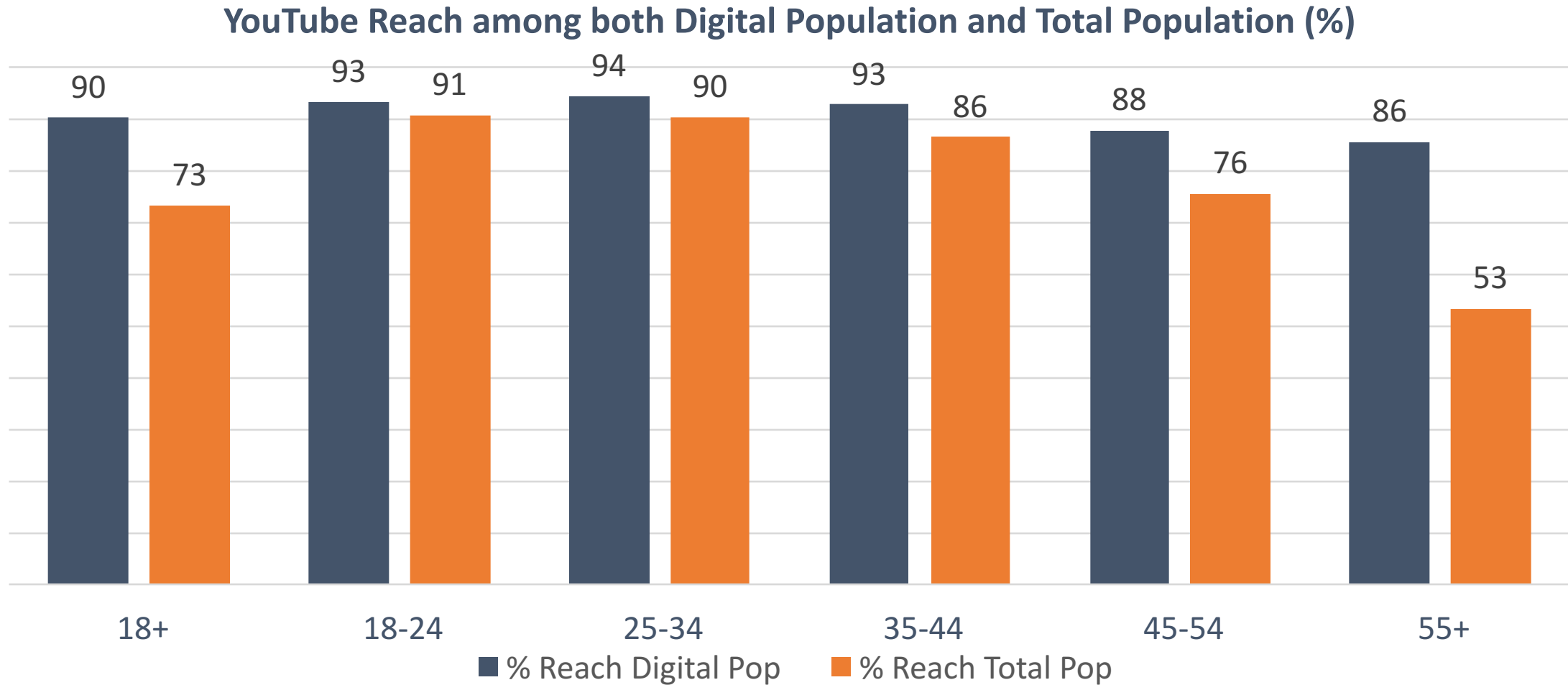
December 2017 Summary



- 37.9 million adult viewers
- Reaches 73% of ALL UK Adults and 90% of internet users
- 337 videos per viewer on average
- 12.8 billion videos watched
- Average 3.7 minutes per video
- 80% of videos consumed on a mobile device
- 74% of viewing time on a mobile
- 18-44s account for 52% of all 18+ internet users but generate 76% of YouTube videos
- 18-34s account for 51% of all YT time

YouTube Reaches 73% of the Adult Population in the UK

December 2017 Summary



Thank you - Questions?

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