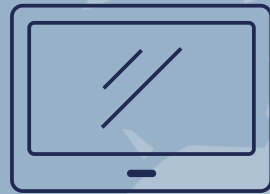




The UK Online Audience



Julie Forey
IAB Research Breakfast
May 2018

UKOM Insights: Snapshots

UKOM Insights
Setting the industry standard for online audience measurement

18-24s and traditional news brands

The role of social media sites in breaking news and influencing readers has never been greater and few would disagree that it had a big part to play in the recent UK General Election. It's no secret that the print newspaper industry is struggling as paid news is on the decline – especially among younger audiences. Fake news has also hit the headlines in the last year as the vast reach of social media sites facilitates widespread distribution of uncorroborated stories in minutes. This month, UKOM looks at the significance of traditional news brands in the online lives of young audiences.

UKOM's analysis of June comScore data, shows that the mainstream media still has a huge role to play in bringing news and content to young adults online. In June 2017, a busy news month with the General Election, terrorist attacks and Grenfell Tower fire all dominating headlines, 18-24s were exposed to online content from a wide range of traditional news providers and journalists from across the spectrum of political persuasion.

	All 18-24s Online June 2017 Reach %	All 15+ Online June 2017 Reach %
The Sun Online	72.3	66.7
BBC News	71.1	77.3
DAILYMAIL.CO.UK	65.0	63.1
THEGUARDIAN.COM	65.5	56.1
MIRROR.CO.UK	61.9	54.1
TELEGRAPH.CO.UK	61.8	55.5
INDEPENDENT.CO.UK	56.1	52.4
Sky News	35.4	36.1
STANDARD.CO.UK	25.5	28.6
EXPRESS.CO.UK	19.3	29.5
DAILYSTAR.CO.UK	5.5	15.1
THETIMES.CO.UK		7.0

Audience duplication analysis, shows us that in June 2017, 94.5% of 18-24s accessed content from either a major daily news title online, BBC news or Sky News online with 8 accessing content from more than one. Admittedly, with the rise of content sharing on social media, some of this content may be related to sport or celebrity go as some of the traditional news brands have strong appeal in these sub-categories. However, if we look specifically at news channels*, from the top 6 online newspapers, 84% of 18-24s accessed 'news' content in June 2017 with 33% viewing content from 2 or more. We include BBC News and Sky News, that goes up to 90%, or 64% of 18-24s, accessed content from two or more traditional news brands online.

Whilst young people may not be buying newspapers as much as they once did, they aren't consuming news from just one publisher which they would have been more inclined to do in the past.

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Airbnb

Airbnb has disrupted the travel lodgings sector since it burst on the scene offering short term holiday lettings. April 2017 was the site's peak month to date when nearly 3 million adults in the UK were looking for or posting rentals on the site according to UKOM approved comScore data. Seasonality over the last couple of years suggests the audience is set to increase during the coming months as people book last minute trips over the summer. So how does Airbnb's current consumer usage compare to the travel accommodation sector?

The graph below shows that across the year the monthly number of people visiting hotel & holiday rental websites fluctuates between around 15 and 19 million. Typically, November and December are the lowest months with January and the summer (July and August) being the peak months.

Airbnb v Hotels/Resorts Category Unique Visitors: Jan 2015-May 2017

COMSCORE

Airbnb's audience has grown rapidly in 2017 and in April (2.9m) and May (2.7m) it was greater than the Expedia owned brands of Hotels.com, Homeaway and OwnersDirect with Trivago being the only dedicated* travel lodging site with more unique visitors. Airbnb also outperformed the major hotel chains in May – the largest of which are Melia, Premier Inn and Travelodge – all with between 2 and 2.5 million UK visitors.

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Social Networks: Changing Profiles

Last month at IAB Engage, Snapchat UK revealed that they have 10 million users in the UK and that 77% of them are aged over 18. As Business Insider* points out, having a large adult user base is good news for Snapchat as it means the audience is more monetisable as it can be targeted. It's good news for advertisers too as adults typically have more purchasing power than teenagers. So how does Snapchat's adult audience of nearly 8 million compare to those of other social networking sites? This month, using UKOM approved comScore multi-platform data (MMX MP), we profile key players in the market and explore usage among adults.

Looking at audience size, 93.1% or 39.4m online adults used a social network in September 2016. Although slightly higher among 18-24s (95%), a whopping 92% of those online aged 55+ now use social media.

Facebook is still by far the most popular site in terms of visitor numbers (among all age groups) followed by LinkedIn and Twitter. Among all adults, Snapchat, although growing fast, is still smaller than Instagram**, Google, Pinterest & Tumblr.

Social Networks: Unique Visitors 18+ – Sept 2016

COMSCORE

However, the rapid adoption of Instagram and Snapchat by 18-24s is closing the gap among younger audiences and the rankings look very different among this age group. Over 50% of 18-24s use Snapchat compared to less than 1 in 5 adults and 64% use Instagram versus an internet average of 18%, pushing them up the rankings to no.3 and no.2 respectively.

UKOM Insights: Netflix Wins for Time in Mobile Apps



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STREAMING TV NETFLIX

You can watch Netflix on any screen you want, but you're probably watching it on a TV

Most Netflix subscribers sign up on phones or computers. But 70 percent of viewing happens on TVs.

By Peter Kafka | Mar 7, 2018, 9:42pm EST

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NETFLIX

You can watch Netflix in almost every country in the world, on any device you want. But the odds are very good that no matter where you watch Netflix, you're going to watch it

Dacia

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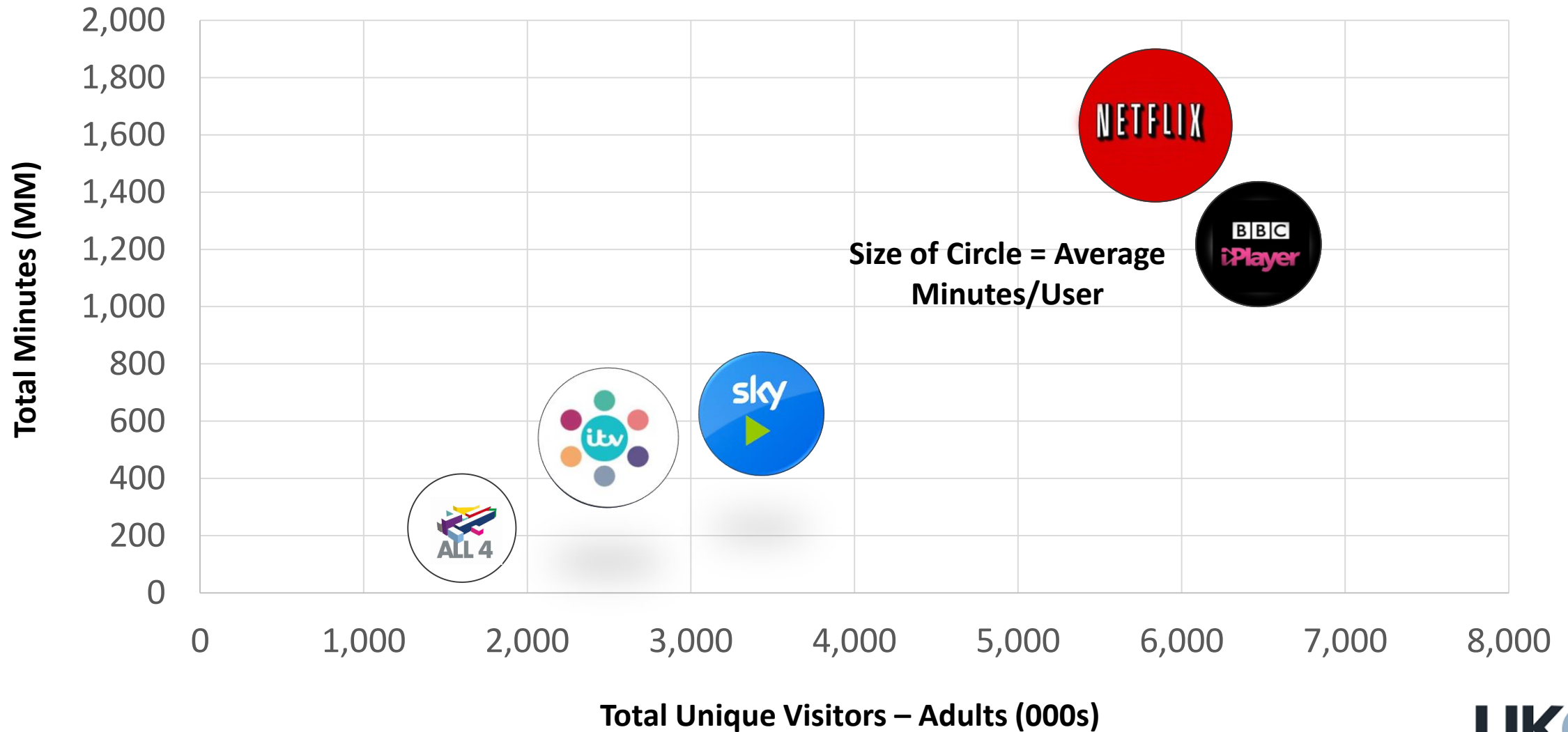


Netflix Wins For Time In Mobile Apps

The latest UKOM endorsed comScore data suggests that tablets and smartphones generate a significant volume of time spent on Netflix.






11.05.2018

Audience & Time Spent: TV Apps on Mobile Devices March 2018



Audience & Time Spent: TV Apps on Mobile Devices March 2018

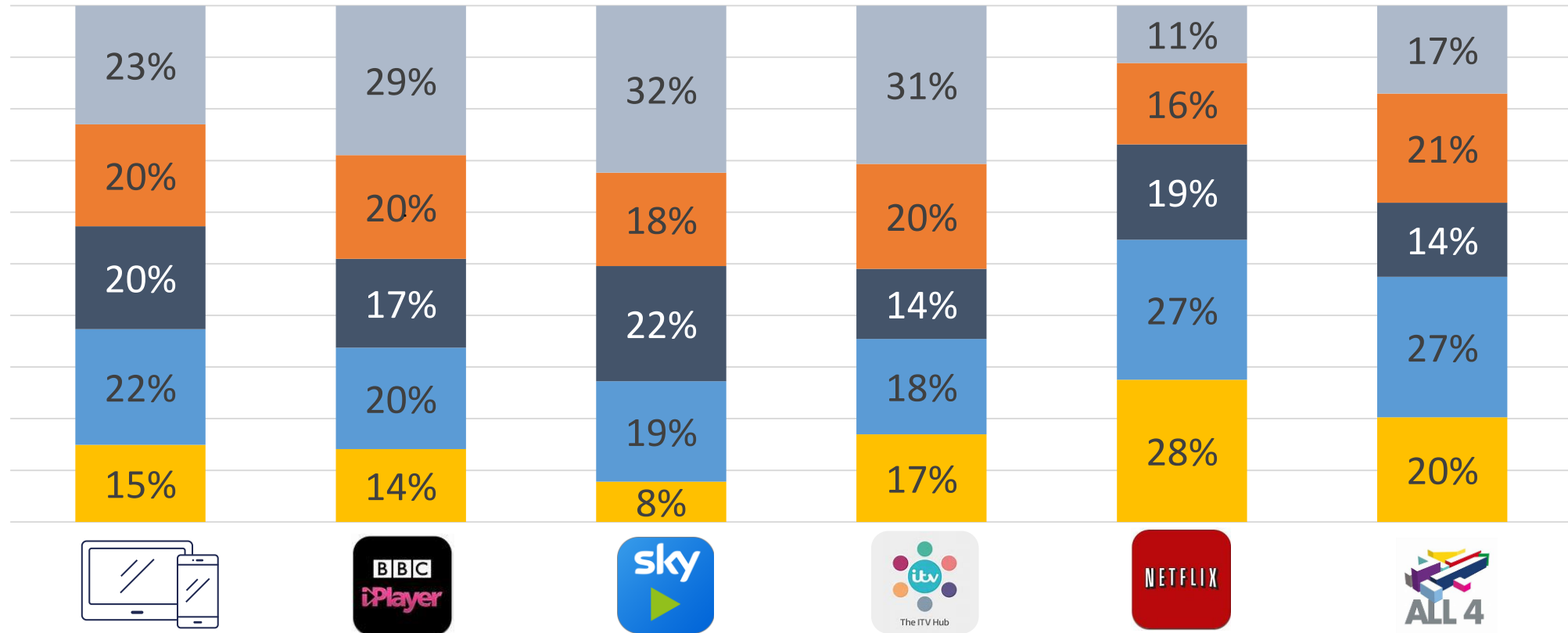


		Total Minutes (MM)	Average Minutes /Visitor	Unique Visitors 18+ (000)
Netflix		1,633	280	5,841
BBC iPlayer		1,218	188	6,470
Sky Go		626	182	3,435
ITV Hub		531	214	2,487
All 4		226	141	1,601

Visitor Age Profile of TV Apps in March 2018



Unique Visitor Age Profile of TV Apps



18-24 25-34 35-44 45-54 55+

UKOM Insights: Is Facebook for Old People?



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Facebook

Is Facebook for old people? Over-55s flock in as the young leave

A forecast 700,000 UK teenagers and young adults will leave the social media site in 2018

Mark Sweney
@marksweney Email
Mon 12 Feb 2018 05:00 GMT

10,553 1,623
This article is over 3 months old









▲ The over-55s are flocking to Facebook to keep up with the social lives of their children and grandchildren. Photograph: Yui Mok/PA

It's official: Facebook is for old(er) people. Teens and young adults are ditching Mark Zuckerberg's social network as popularity among the over-55s surges, according to a report.

In 2018, 2.2 million 12- to 17-year-olds and 4.5 million 18- to 24-year-olds will

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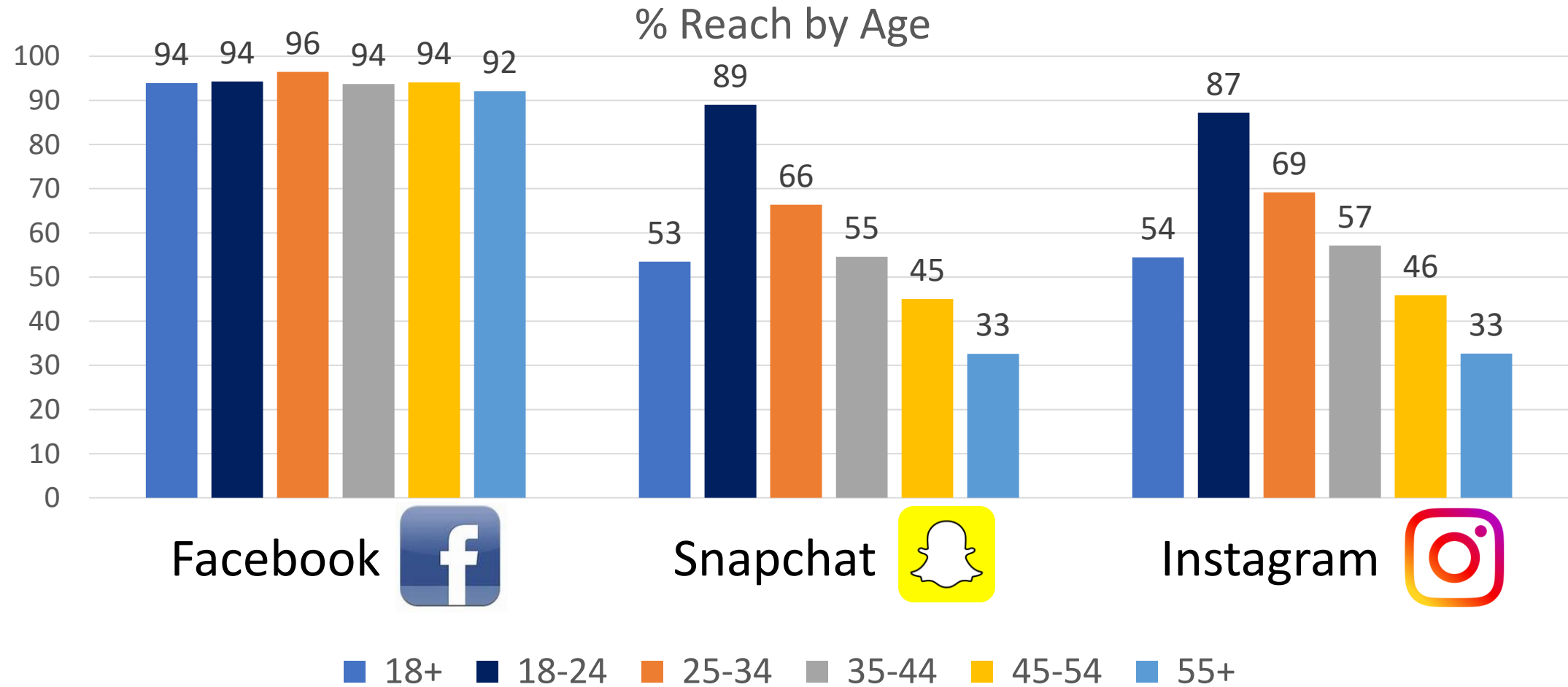


Facebook & Snapchat: Age Profiles

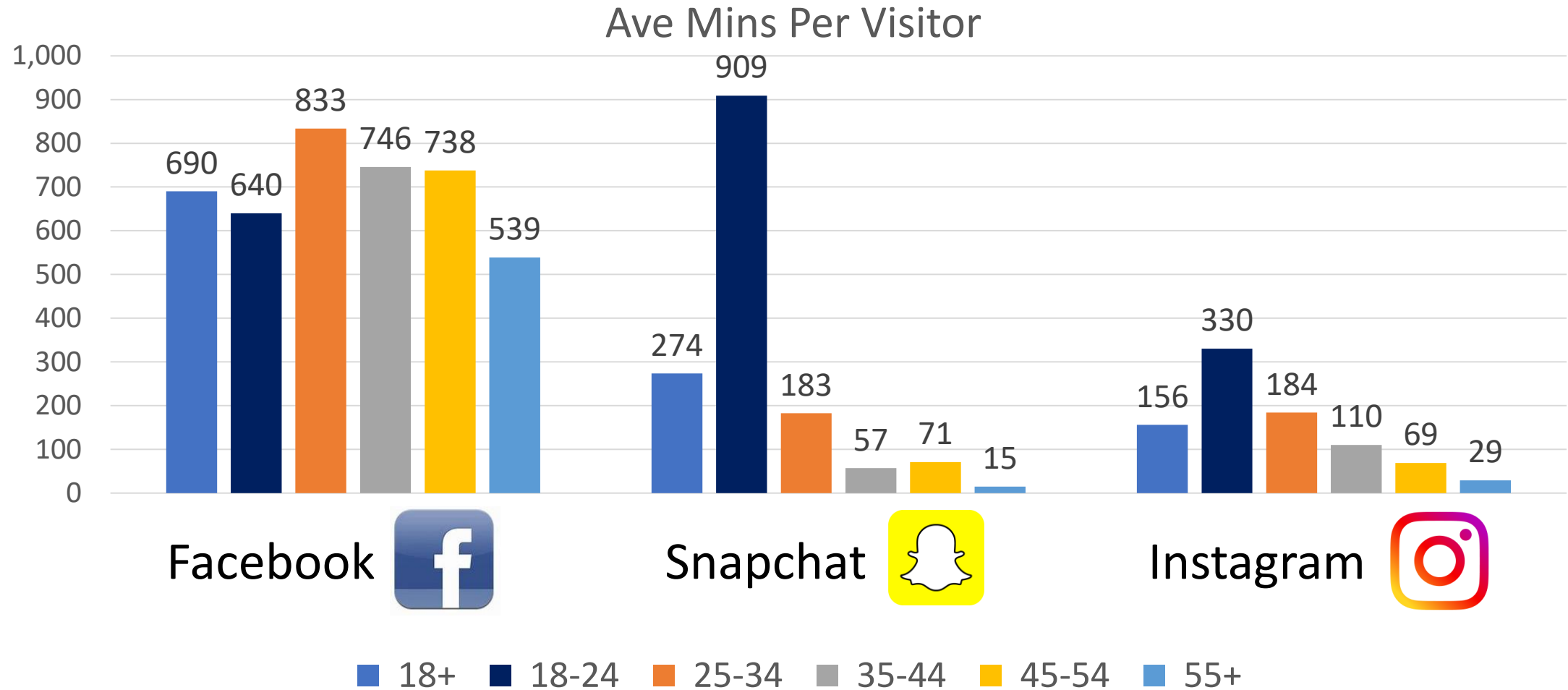
A recent news article in The Guardian, based on data from e-Marketer, asked the ...

01.03.2018

Facebook has >90% reach across all age groups



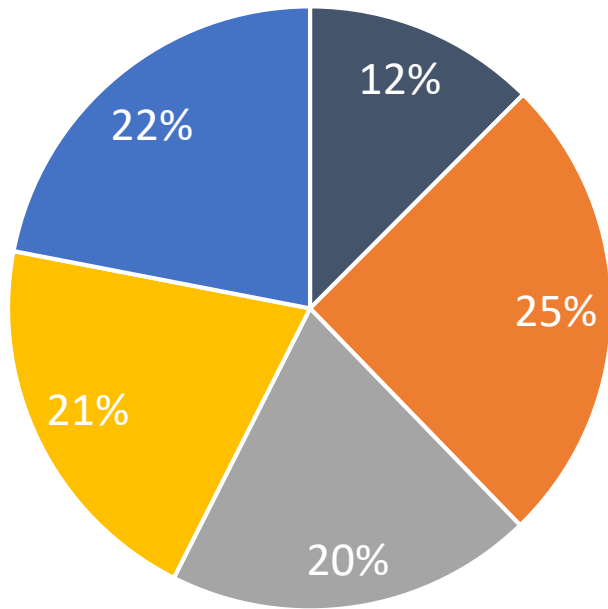
18-24s Spend longer on Snapchat



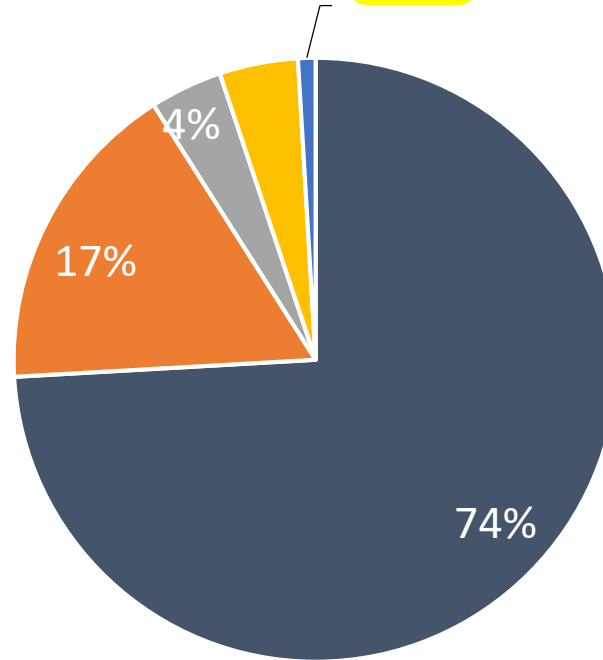
Facebook & Snapchat: Total Minutes by Age (%)



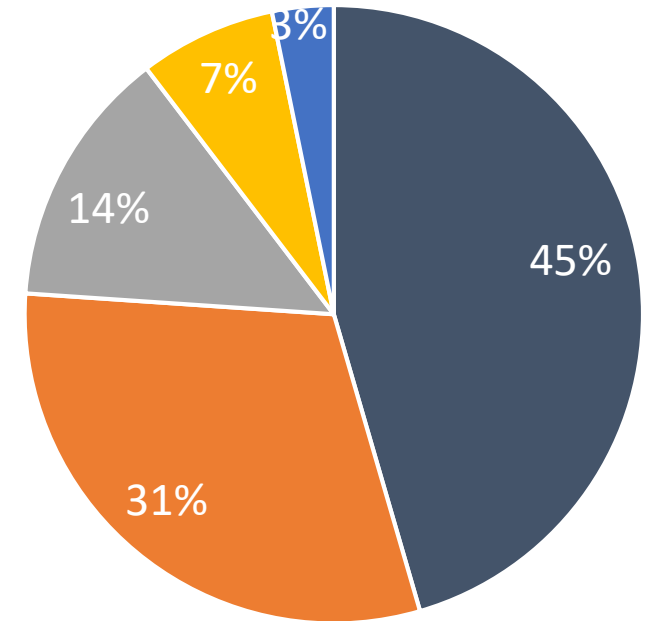
Facebook 



Snapchat 



Instagram 



■ 18-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

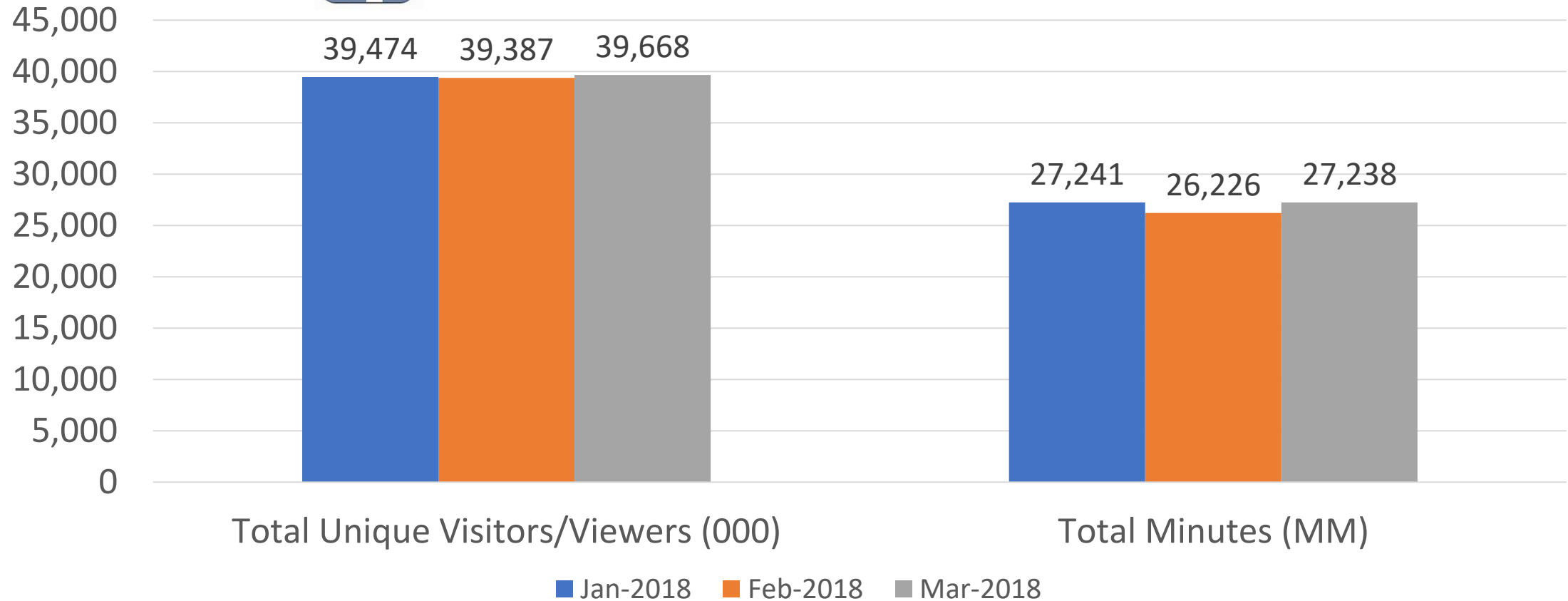
Source: comScore MMX Multi-Platform, UK, based on adults 18+, January 2018

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

Facebook audience static despite headlines...



Facebook Audience & Minutes: Jan-Mar 2018



UKOM Insights: Restaurant & Fast Food Apps



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England Local News Regions **London**

London Mayor Sadiq Khan plans TfL 'junk food' advert ban

11 May 2018

Share

Adverts for "unhealthy food and drink" could be banned on the Tube, Overground, buses and bus shelters

Junk food advertising could be banned across the entire Transport for London (TfL) network, City Hall has announced.

The Mayor of London, Sadiq Khan, says he wants to tackle the "ticking time bomb" of child obesity in the capital.

If the proposal is approved, adverts for "unhealthy food and drink" will be banned

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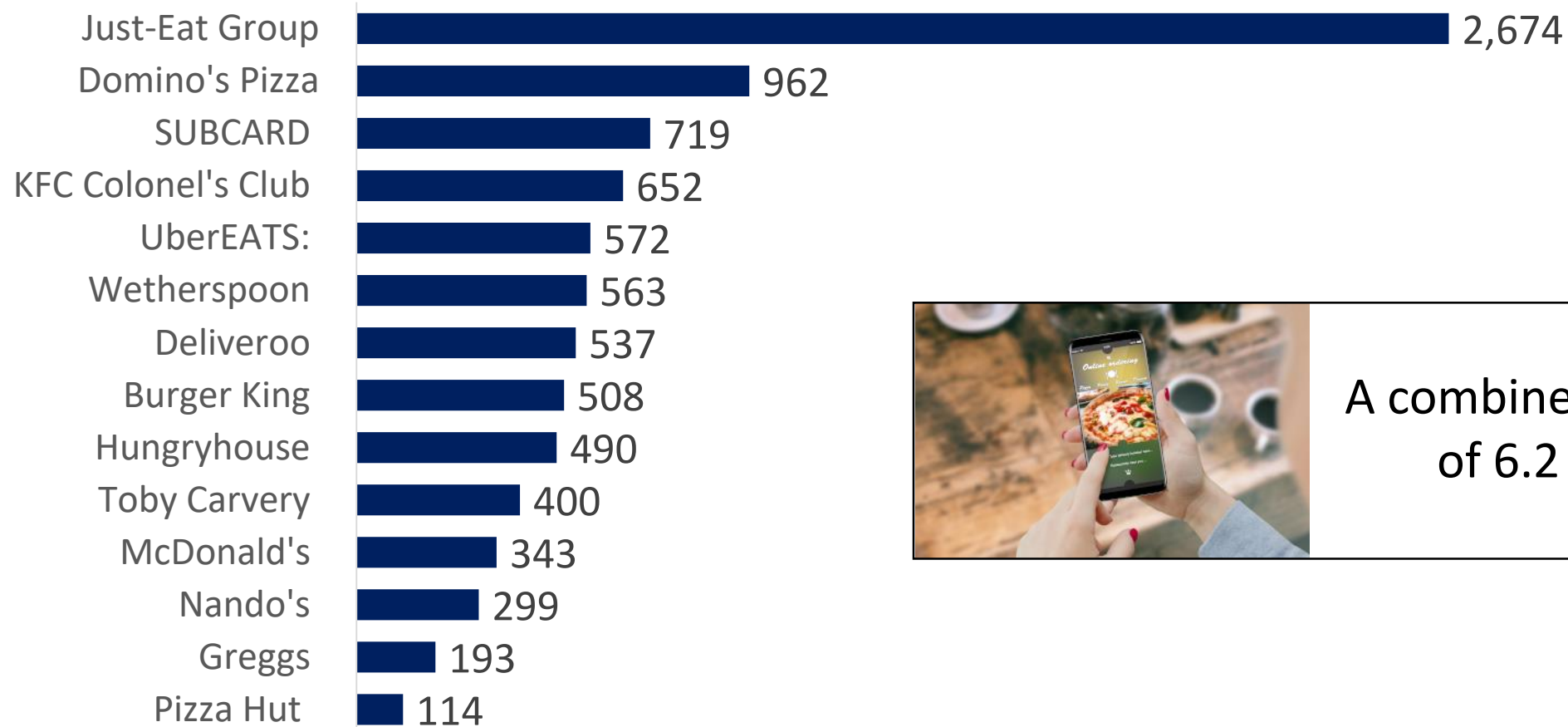
Features

Fast Food by Smartphone

Last week, London Mayor, Sadiq Khan called for a ban on junk food advertising on the transport network in a move to tackle childhood obesity, but looking at usage of smartphone apps among adults, it's clear that the UK's penchant for convenience food is not limited to children...

Restaurant & Food Delivery Smartphone Apps: March 2018

Food Delivery & Restaurant Smartphone Apps: Unique Visitors (000s)



A combined audience
of 6.2 million

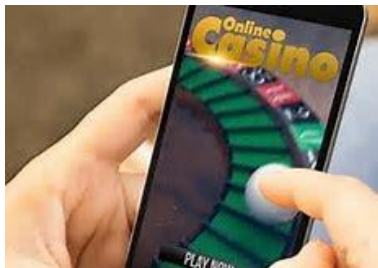
Convenience Food v Other Smartphone App Usage



Convenience Food 6.2m



Online Dating 3.2m



Online Gambling 2.8m

UKOM Insights: Quarterly Digital Market Overview



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Digital Market Overview

UKOM DMO DIGITAL MARKET OVERVIEW Q1 | 2018

Q1 2018 UK Digital Market Overview report

Key insights include: Mobile devices now account for 75% of all adults' time online. For the first time, more 55+s use a smartphone than a tablet to access the internet. ...

UKOM DMO DIGITAL MARKET OVERVIEW Q4 | 2017

Q4 2017 UK Digital Market Overview report

Insights include: Mobile apps account for 61% of ALL minutes and 83% of MOBILE minutes. Mobile share of time is higher among females (81%) than males (65%). ...

UKOM DMO DIGITAL MARKET OVERVIEW Q3 | 2017

Q3 2017 UK Digital Market Overview report

Insights include: Smartphone's share of online minutes among 18+ is now 59% - smartphone apps alone account for 50% of all online minutes as 81% of all online adults use a mobile app each month. ...

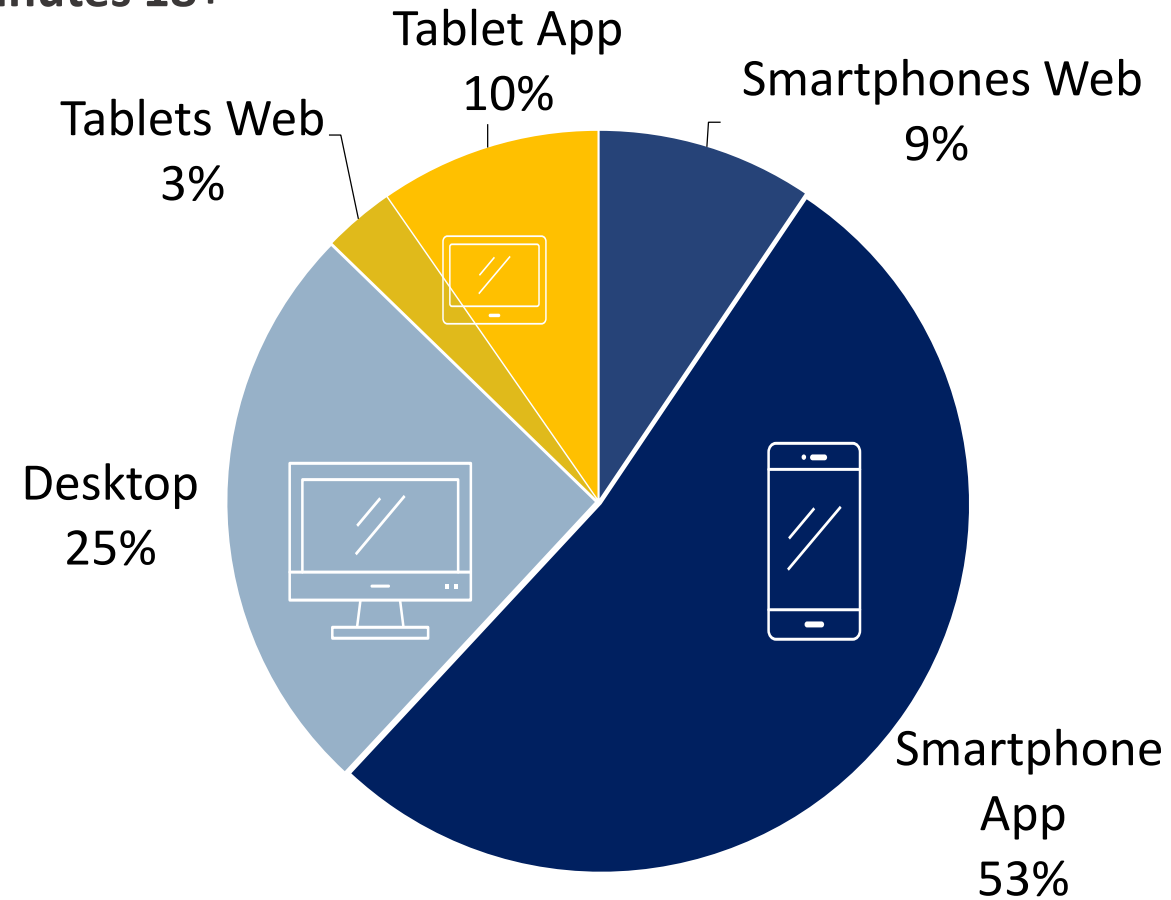
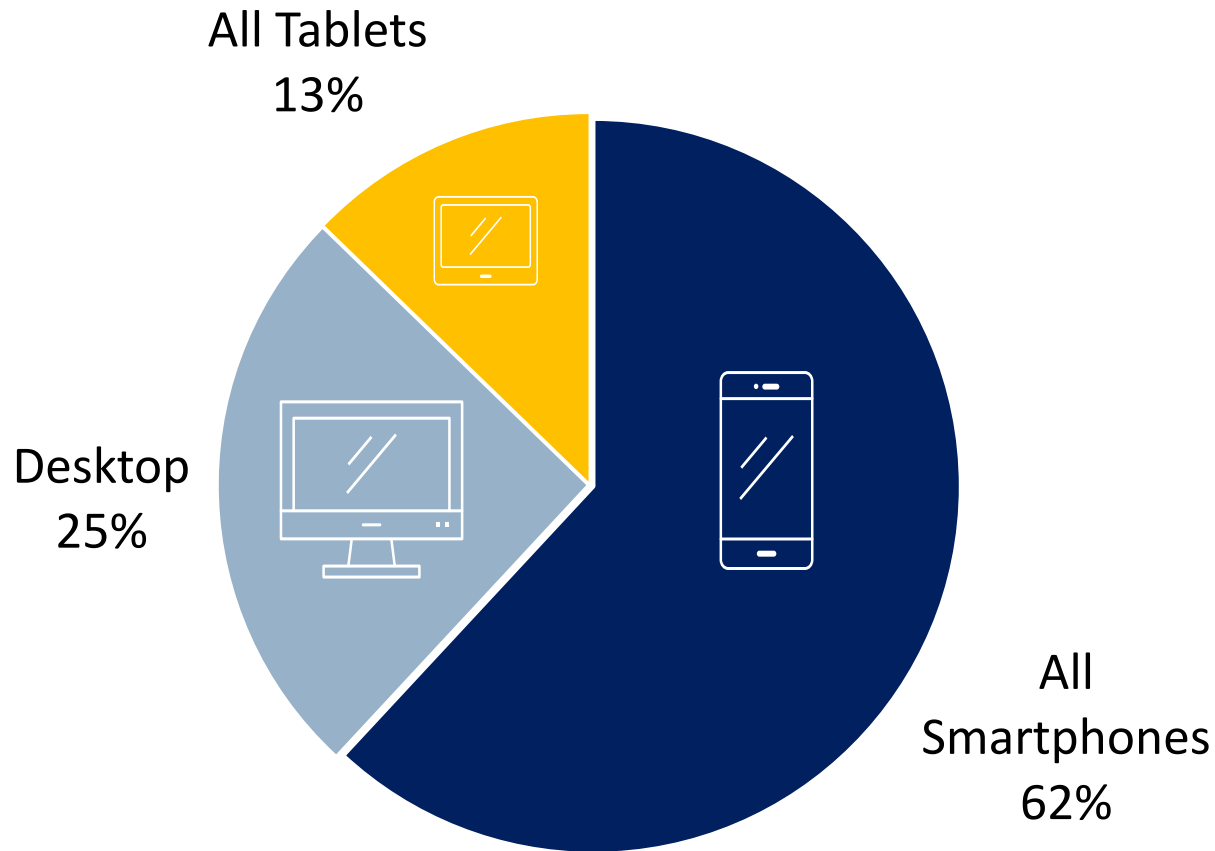


The UK population now spends more time online on smartphones than any other device

Share of Minutes by Platform

Smartphones now account for **62%** of all adult online minutes

Share of Total Minutes 18+





Platform share varies by content category and publisher

Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

25%



Smartphone total

62%



Tablet total

13%

Education	86%
Auctions	74%
Car Rental	73%
Government	67%
Family & Youth	67%
Airlines	65%
Business to Business	64%
Entertainment - Movies	64%
News/Research	63%
Autos Manufacturer	63%

• Instant Messengers	98%
• Job Search	94%
• Gay/Lesbian	93%
• Photos	91%
• Books	87%
• Social Media	84%
• Entertainment - Music	84%
• Personals	84%
• Maps	83%
• Retail - Music	83%

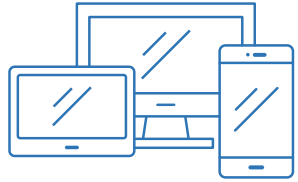
• TV	39%
• Radio	36%
• General News	31%
• Coupons	28%
• Incentives	27%
• Online Gaming	20%
• Real Estate	18%
• Lotto/Sweepstakes	16%
• Travel - Information	16%
• Family & Youth	16%

Source: comScore MMX Multi-Platform, March 2018, UK, Adults 18+

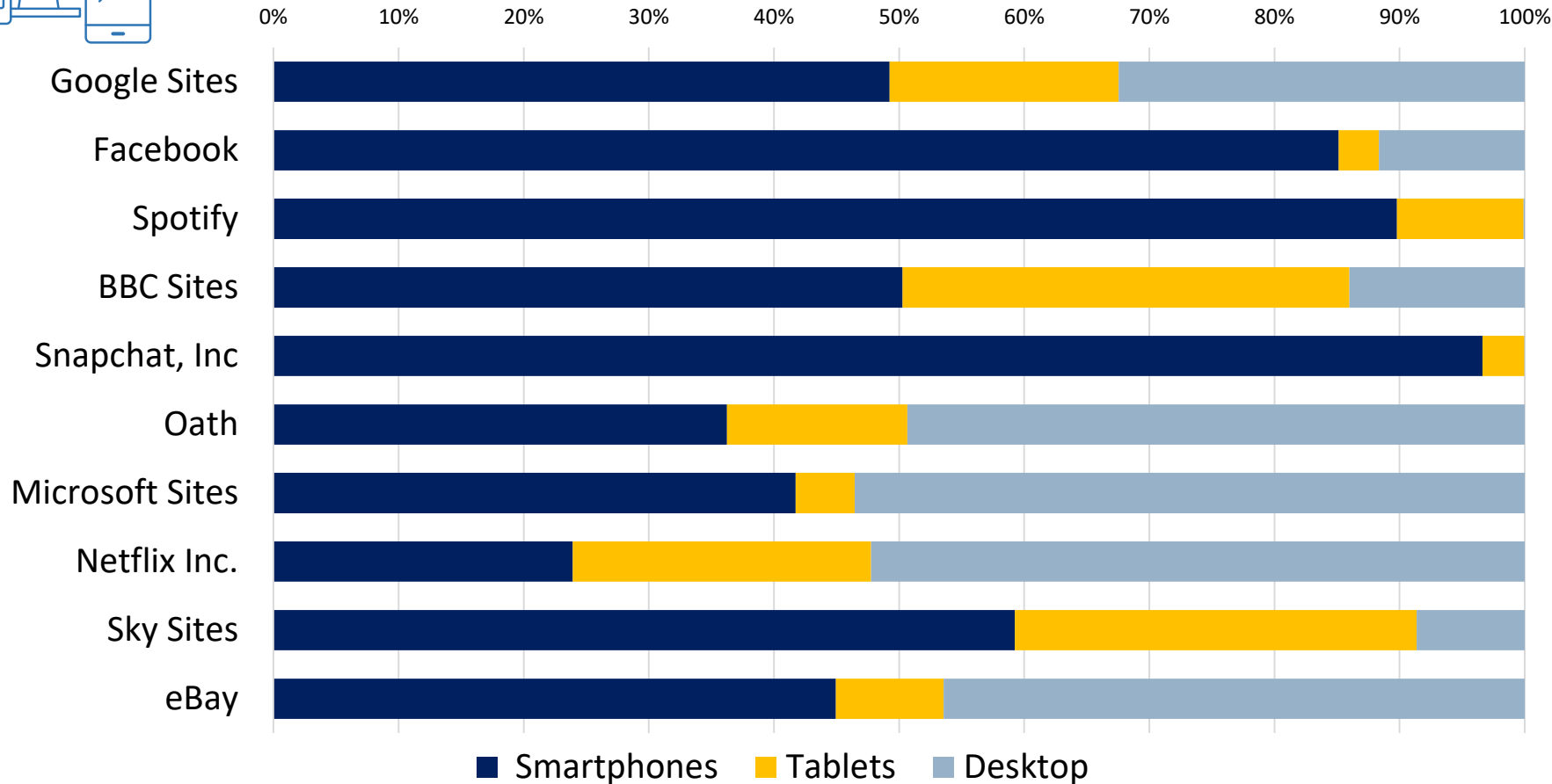
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

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



Share Of Minutes



Snapchat & Spotify have the greatest share of time on mobile devices

BBC & Sky have highest Tablet share out of top 10

Majority of time spent online for Microsoft is on the desktop

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Digital Market Overview

Q1 | 2018
Q1 2018 UK Digital Market Overview report
Key insights include: Mobile devices now account for 75% of all adults' time online. For the first time, more 55+s use a smartphone than a tablet to access the internet. ...

Q4 | 2017
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Oath's UK Audience
When looking at the top 10 internet properties in terms of unique monthly visitors, the ...
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Facebook & Snapchat: Age Profiles
A recent news article in The Guardian, based on data from e-Marketer, asked the ...
01.03.2018

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