

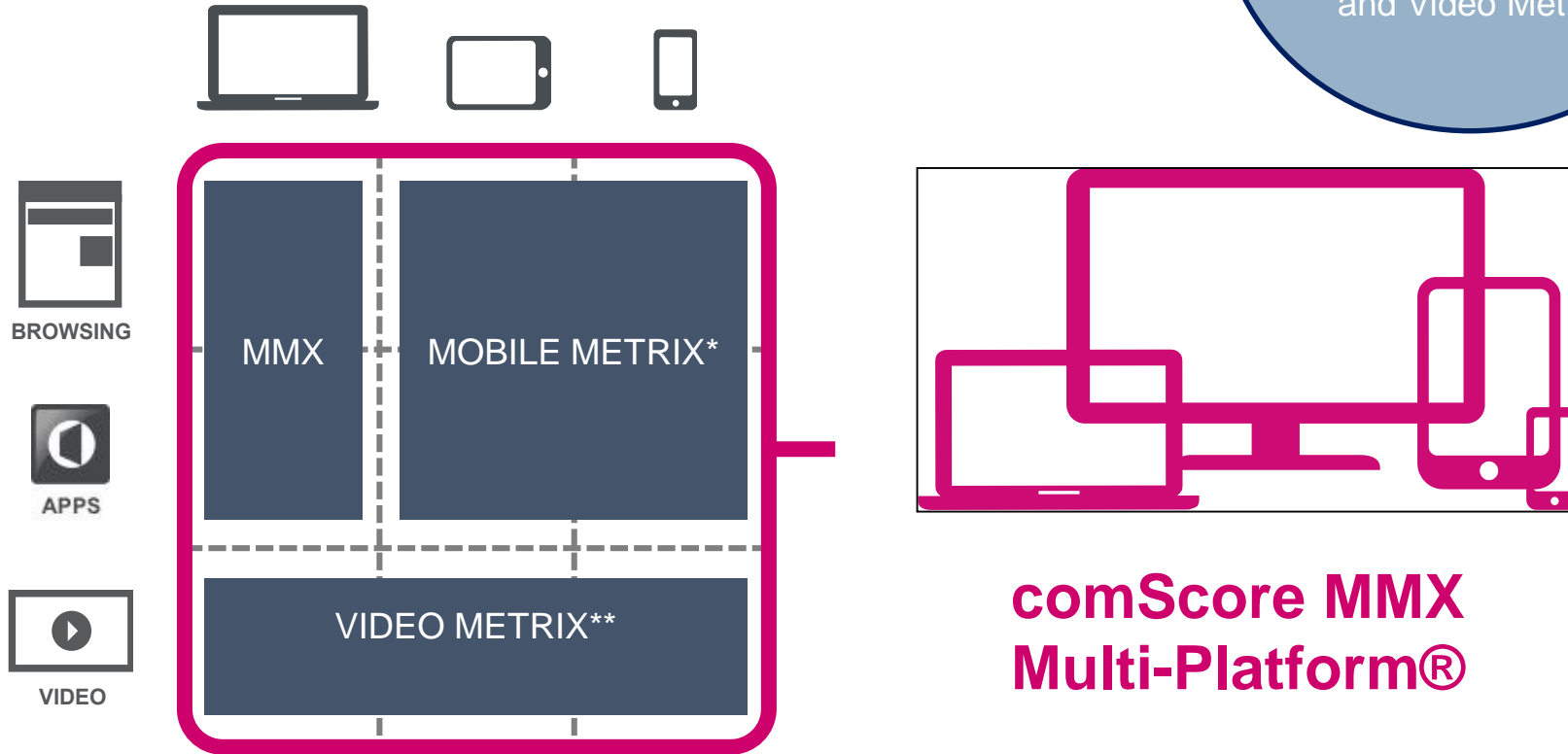
UK Digital Market Overview – June 2018



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

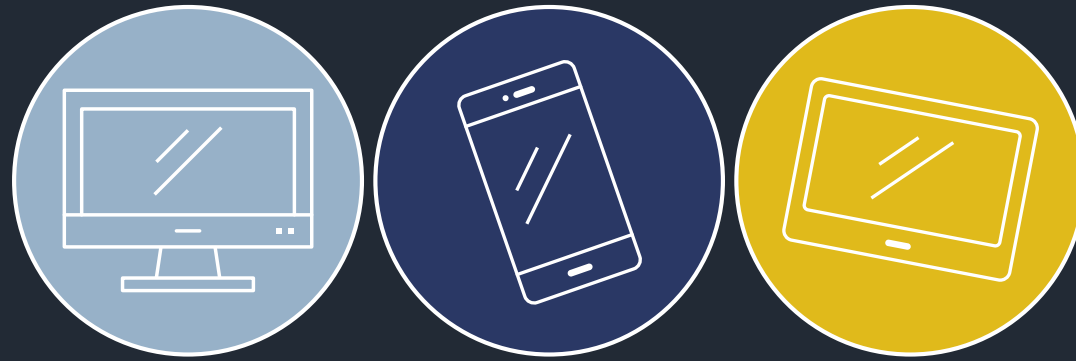


New developments in UK online audience measurement and changes in online universes

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](#).

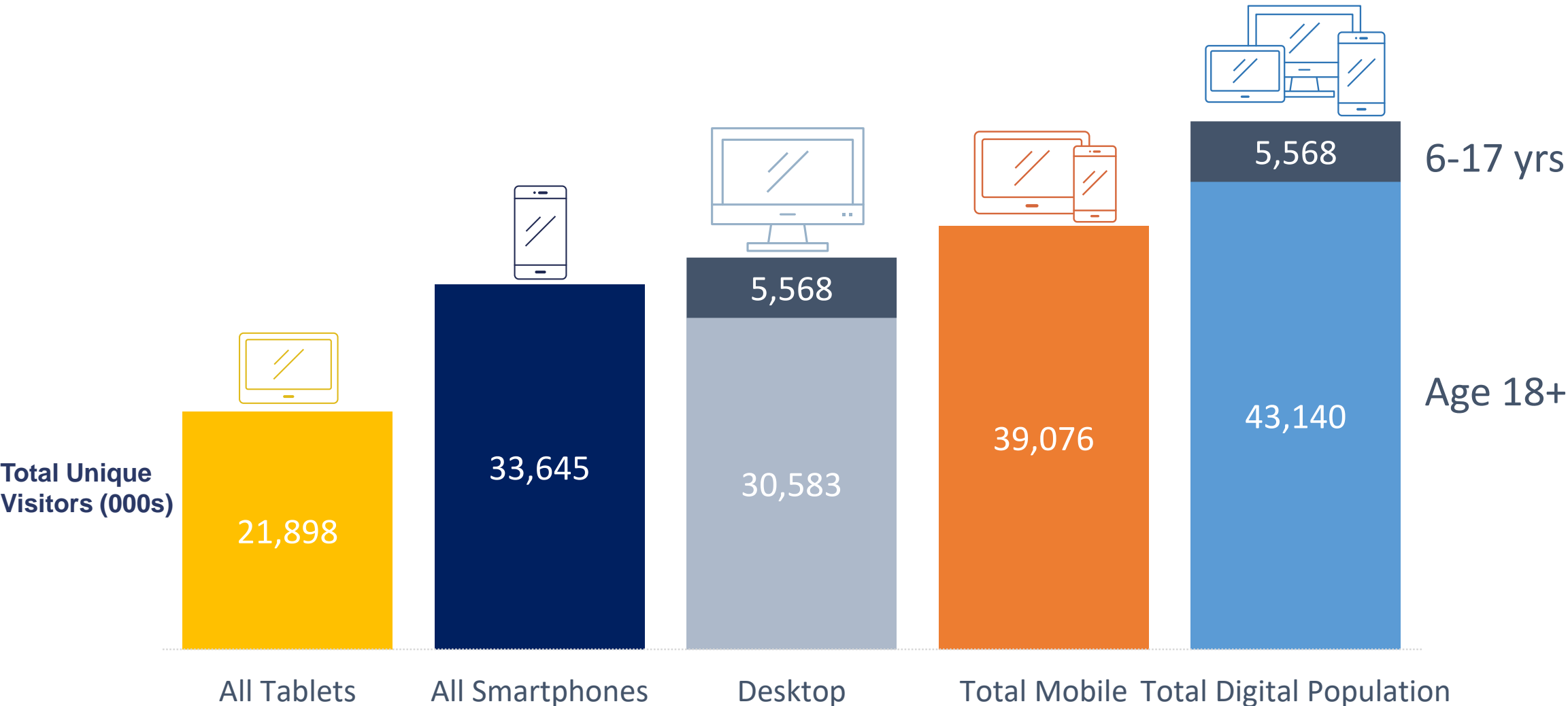
A major UK change is that UKOM has updated the source for UK online universe estimates for all the comScore products that it endorses from the previous National Readership Survey (NRS) to the new PAMCo study by Ipsos MORI. In order to take into account device fragmentation and changes in consumer cross-platform online access at home and at work, the PAMCo 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 PAMCo 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.

Effective with **March 2018 data**, the UK Desktop and Total Digital Population universe estimates available in MMX, Video Metrix and MMX Multi-Platform UK have been updated using the latest PAMCo enumeration data. Additionally, MMX Multi-Platform UK now benefit from the expansion of reportable Total Digital Population universe to include mobile teens audiences. Please refer https://mymetrix.comscore.com/app/cmdata/comScore_March_2018_data_enhancements.pdf for more information.



Usage by Platform

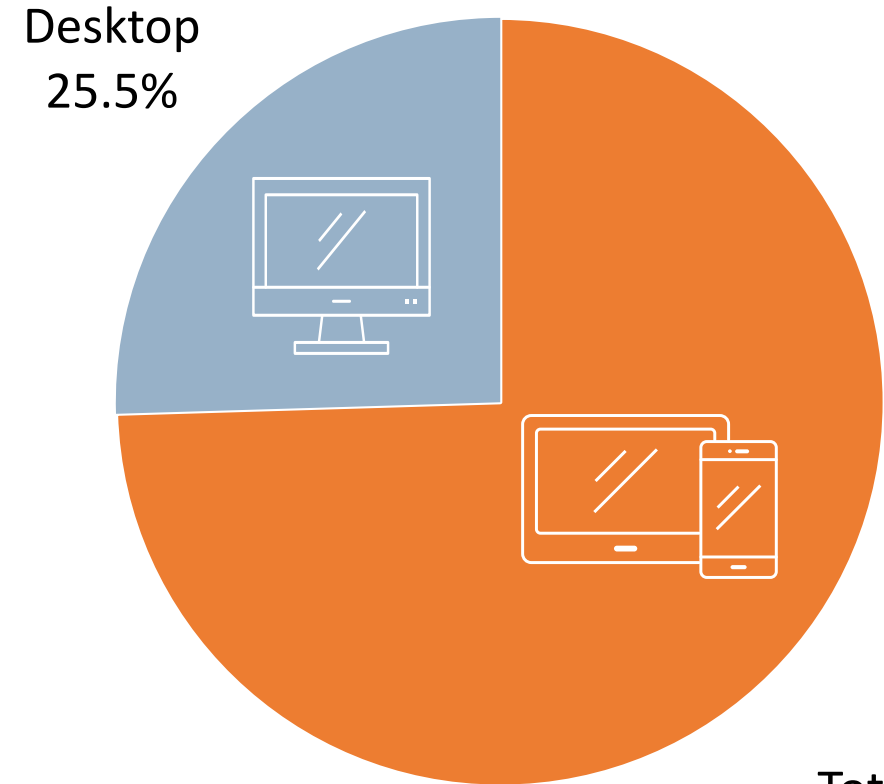
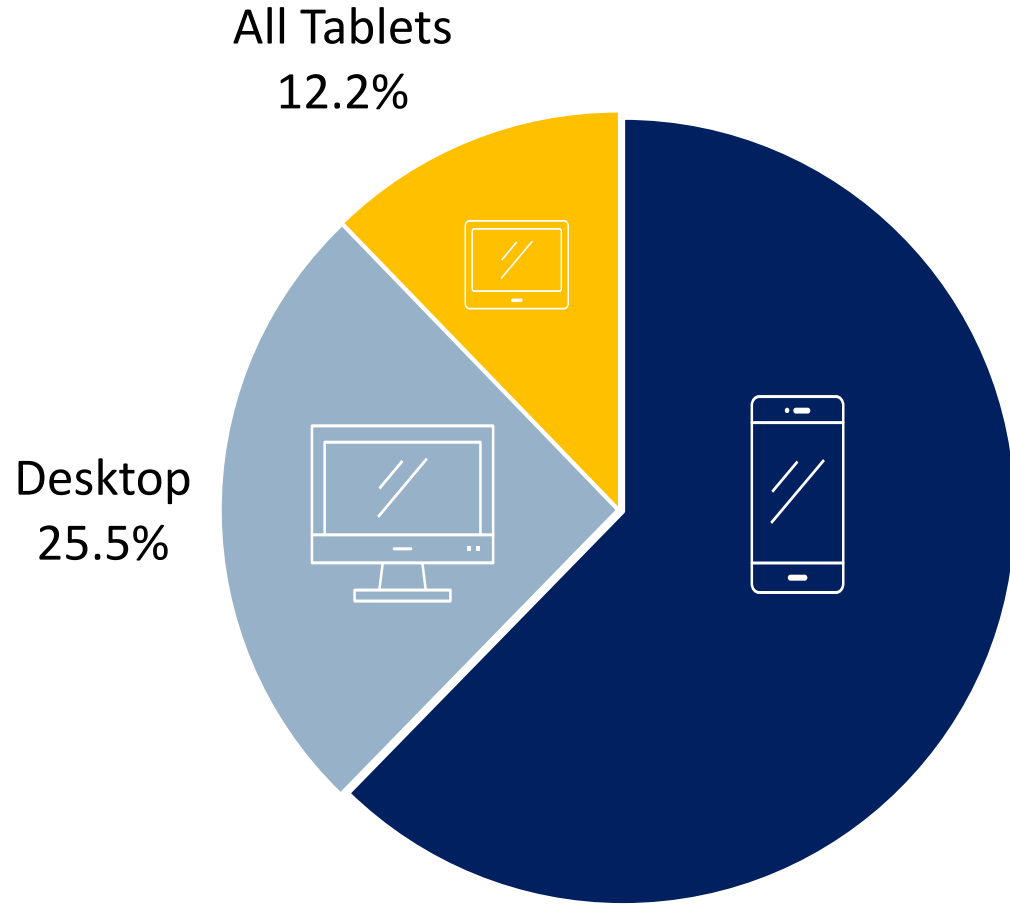
Breakdown of Digital Unique Visitors by Platform



Share of Minutes by Platform

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

Share of Total Minutes 18+



Total Mobile
74.5%

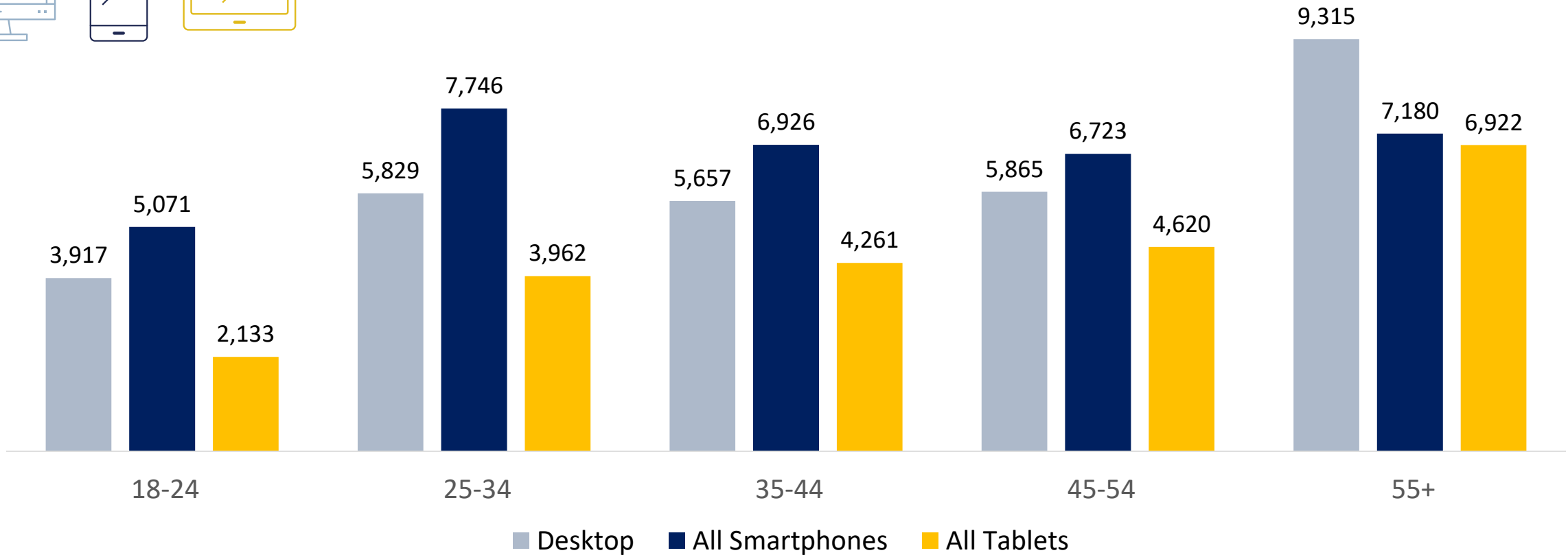
UKOM
Setting the industry standard for
online audience measurement

Platform Unique Visitors by Age

The Desktop has higher reach amongst Older Audiences

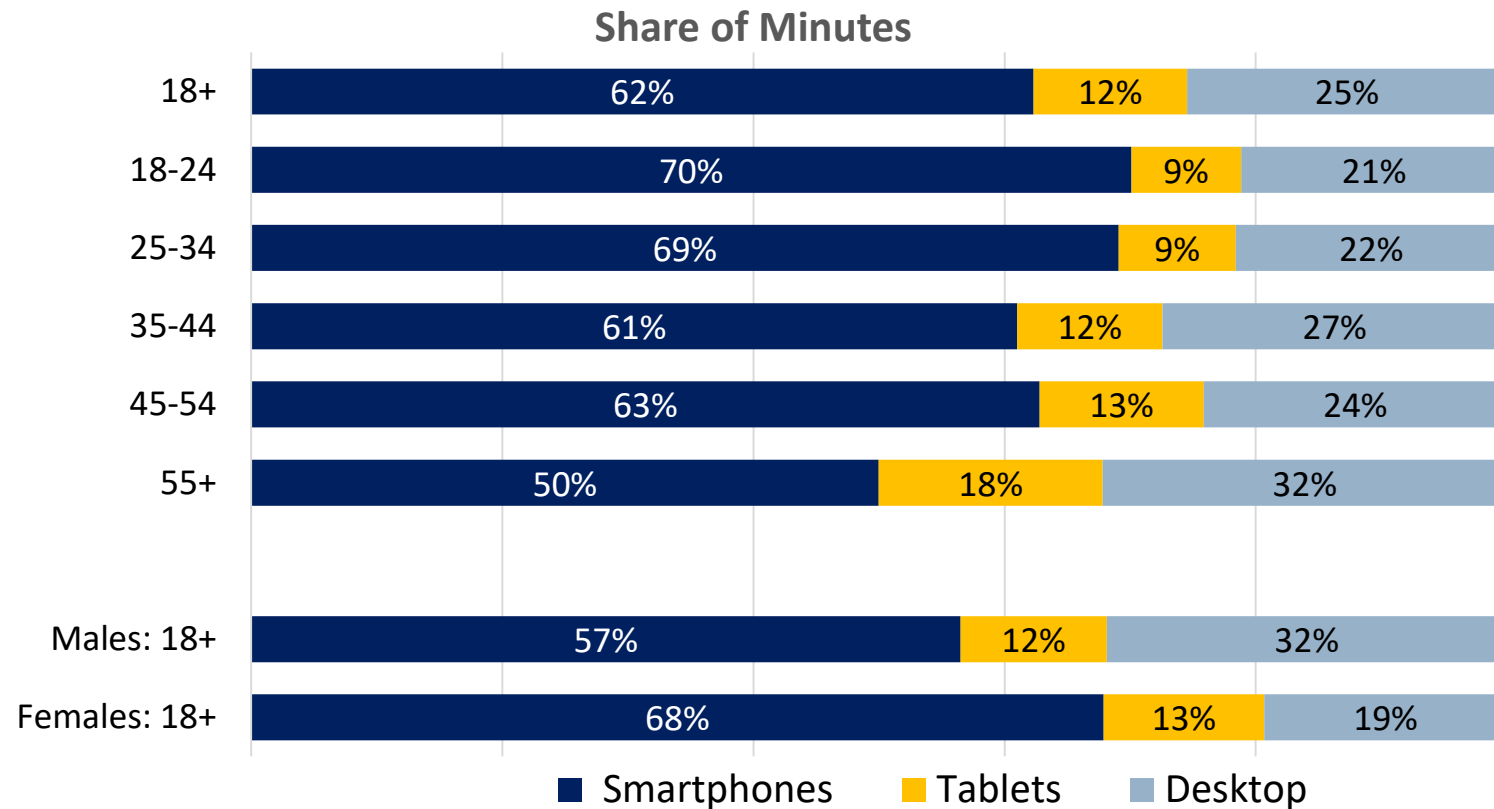


Audience by Platform by Age - Unique Visitors (000s)



Platform Share of Minutes by Age & Gender

Millennials & females spend greatest share of time on mobile devices



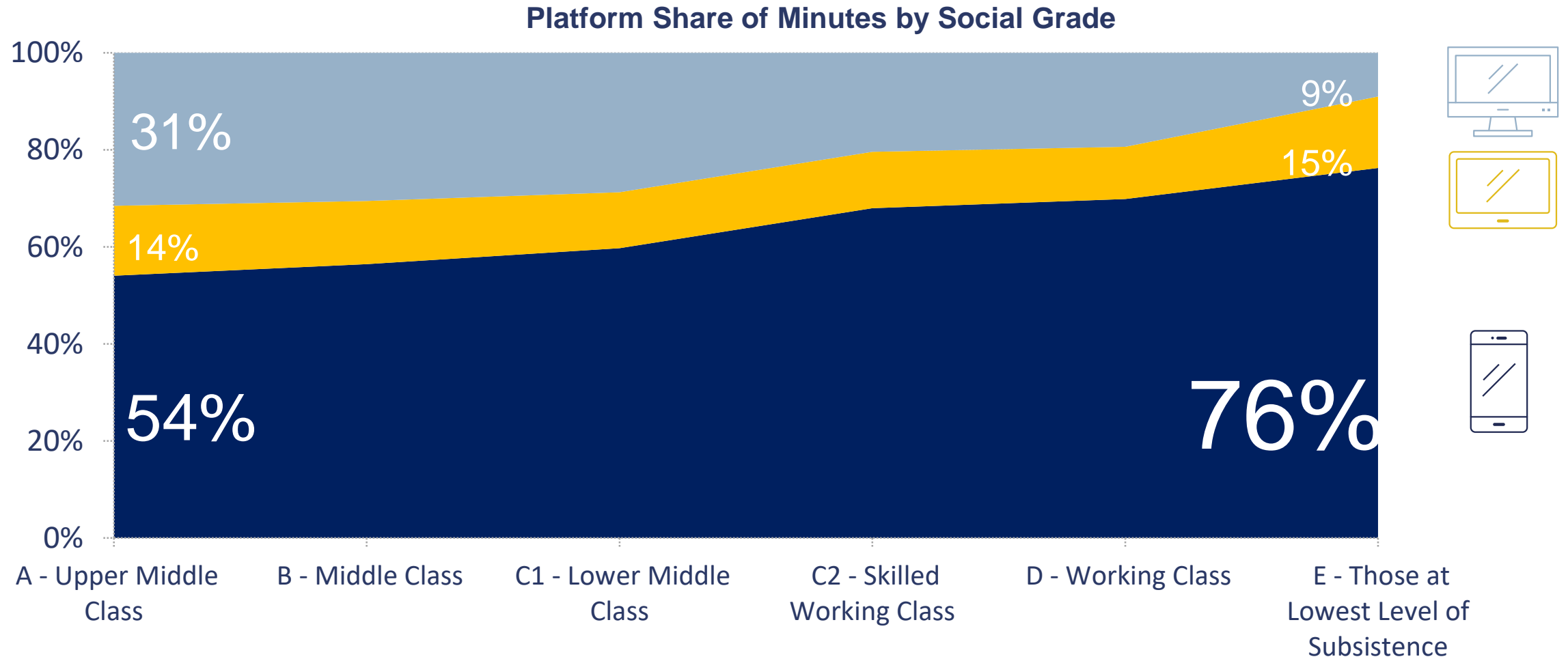
Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 81% of their time online on mobile devices compared to only 69% for males.



Platform Share of Time Online by Social Grade

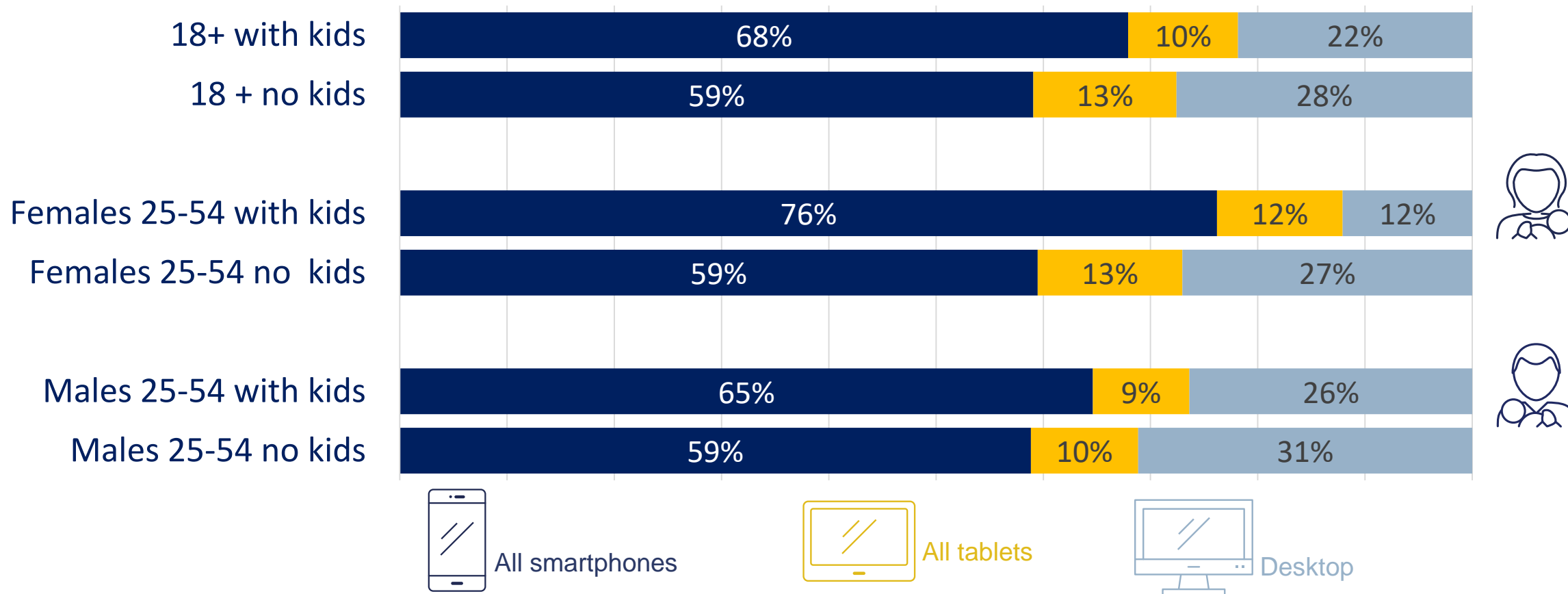
Smartphone share increases with decreasing social grade



Platform Share of Time by Presence of Kids

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

Share of minutes by platform – Parents v Non-Parents



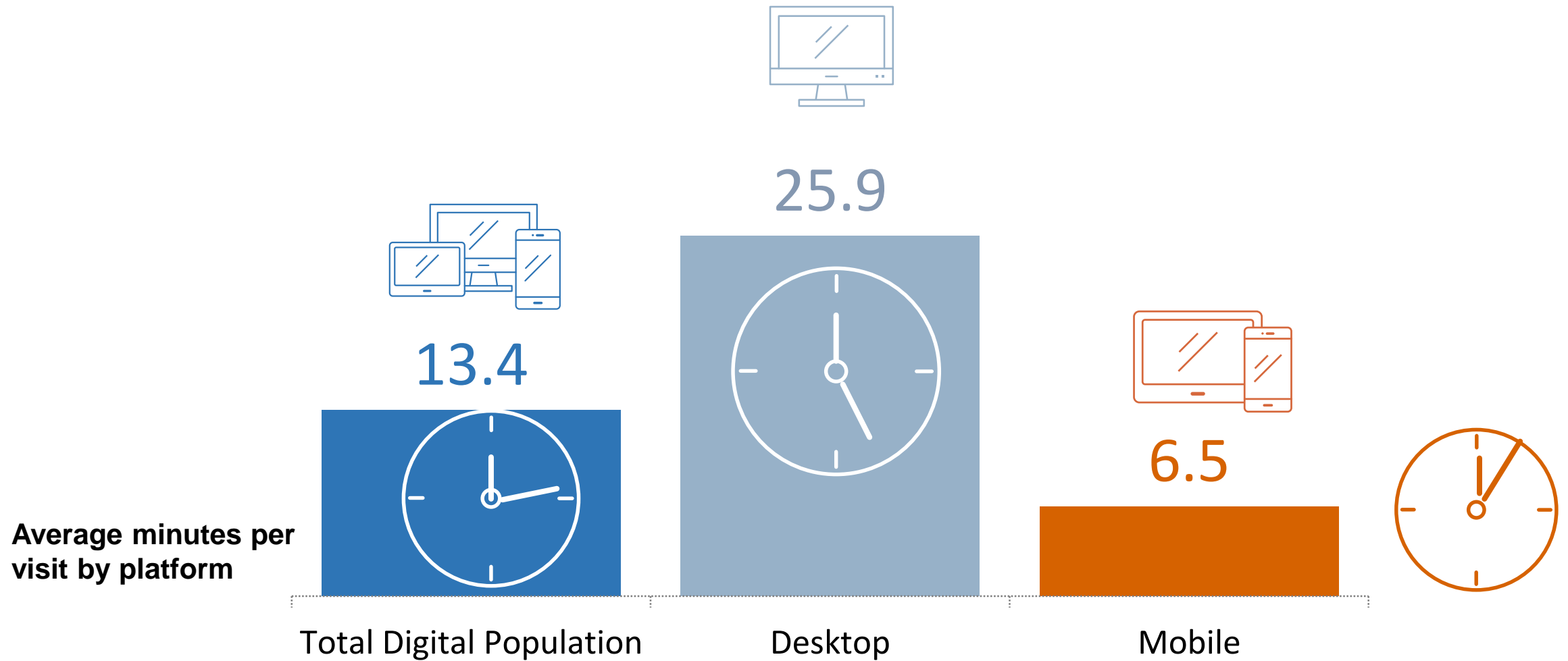
Source: comScore MMX Multi-Platform, June 2018, UK

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

* Females 25-44 with Kids in household used as a proxy for 'Mums' and kids in household used as a proxy for 'Parents'

Average Minutes per Visit by Platform

Mobile visits are **shorter**



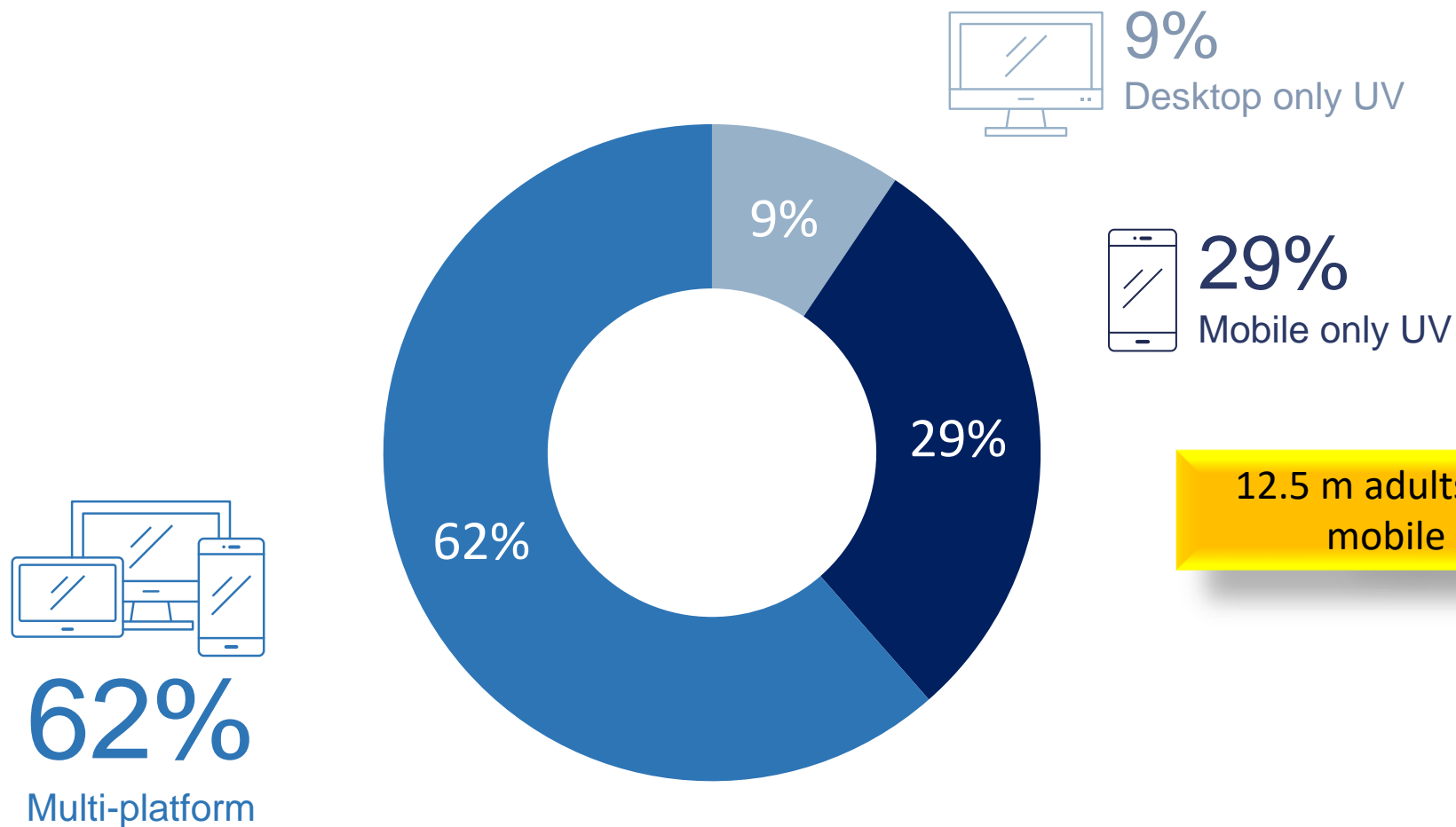
Average minutes per visit by platform



Multi-Platform Usage

Multi-Platform Usage

Over a quarter of Online Adults are now Mobile Only

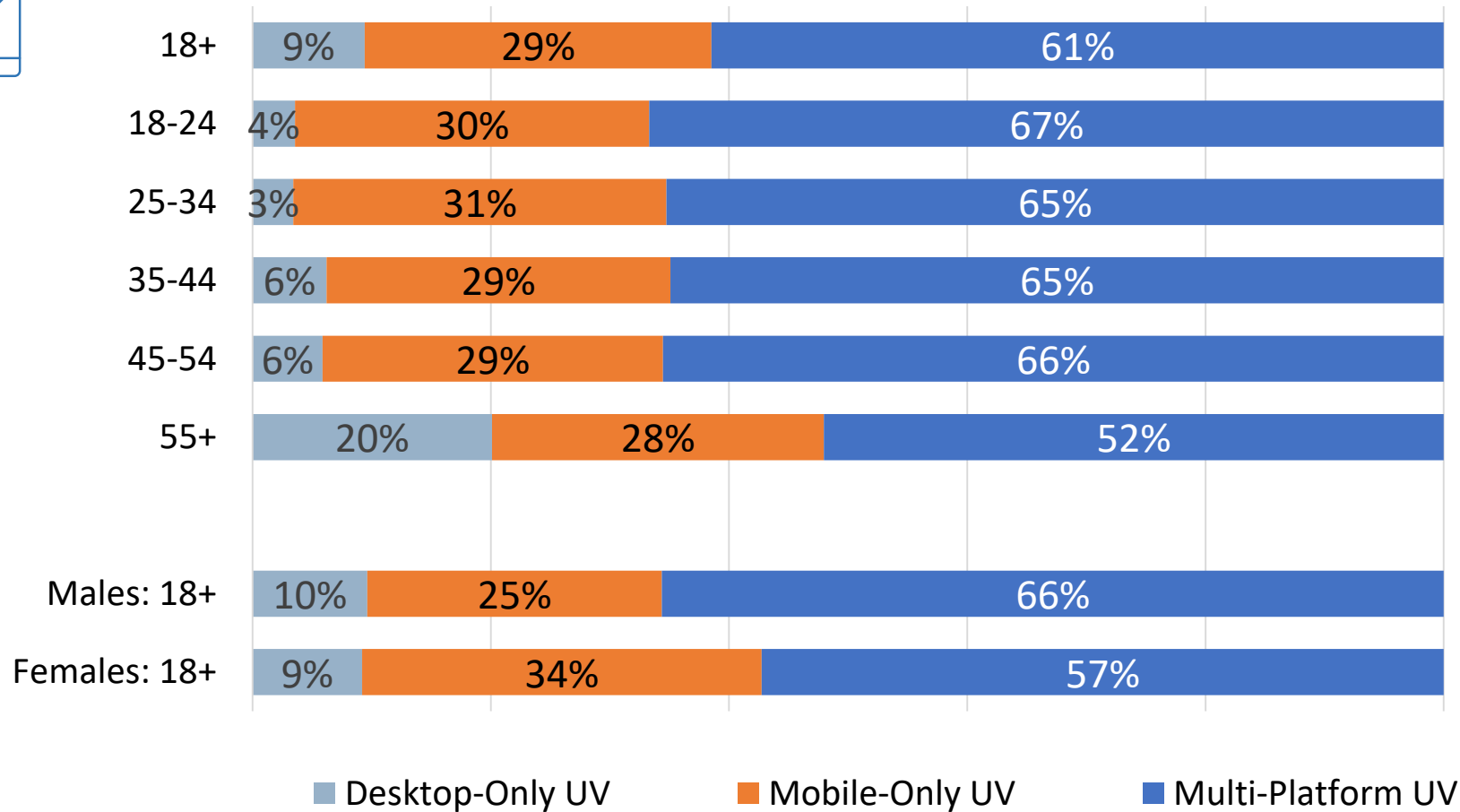


Multi-Platform usage by age and gender

55+ are least likely to be Multi-Platform



Unique Viewers by Platform by Age & Gender



Only 52% of 55+ are Multi-Platform

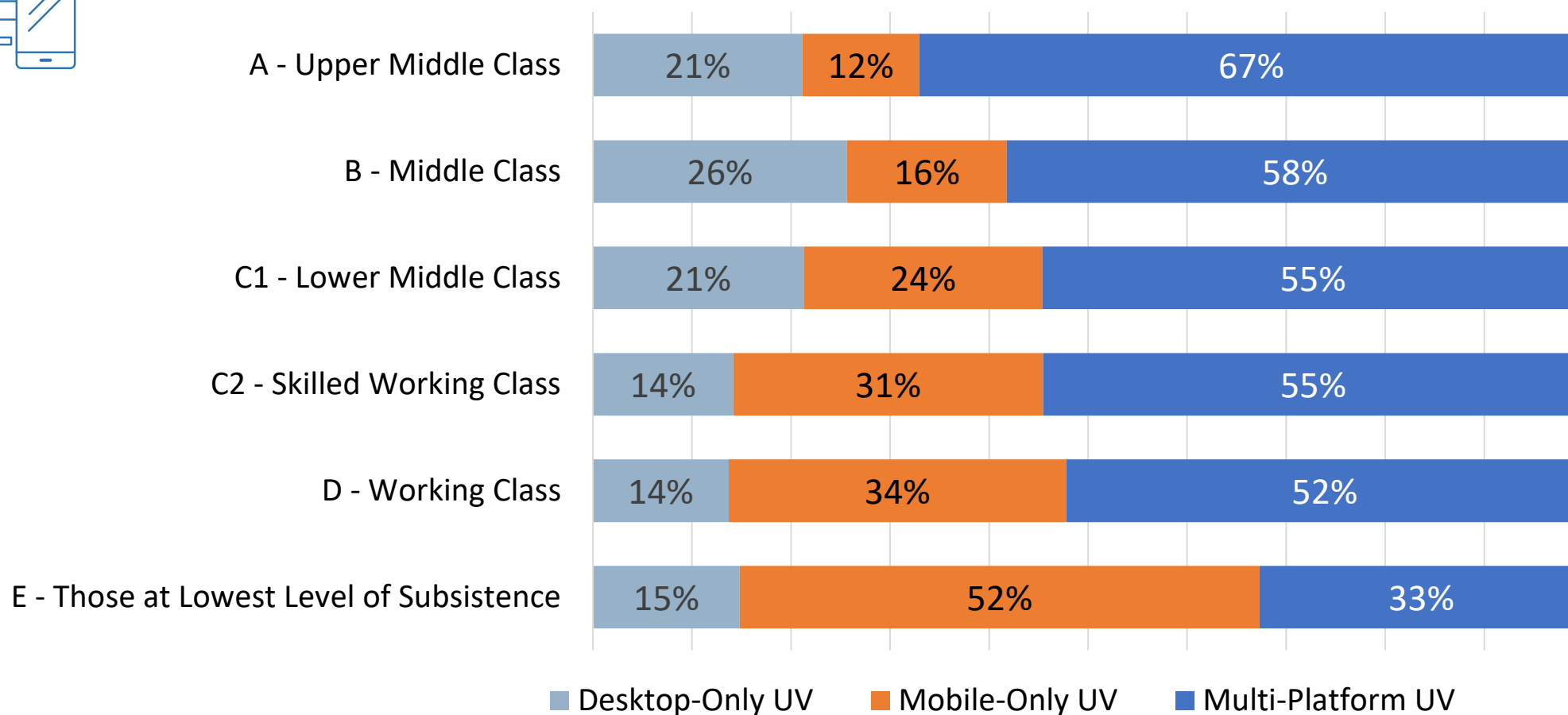
Females are more likely to be 'Mobile Only'

Multi-Platform usage by social grade

Lower social grades are least likely to be multi-platform



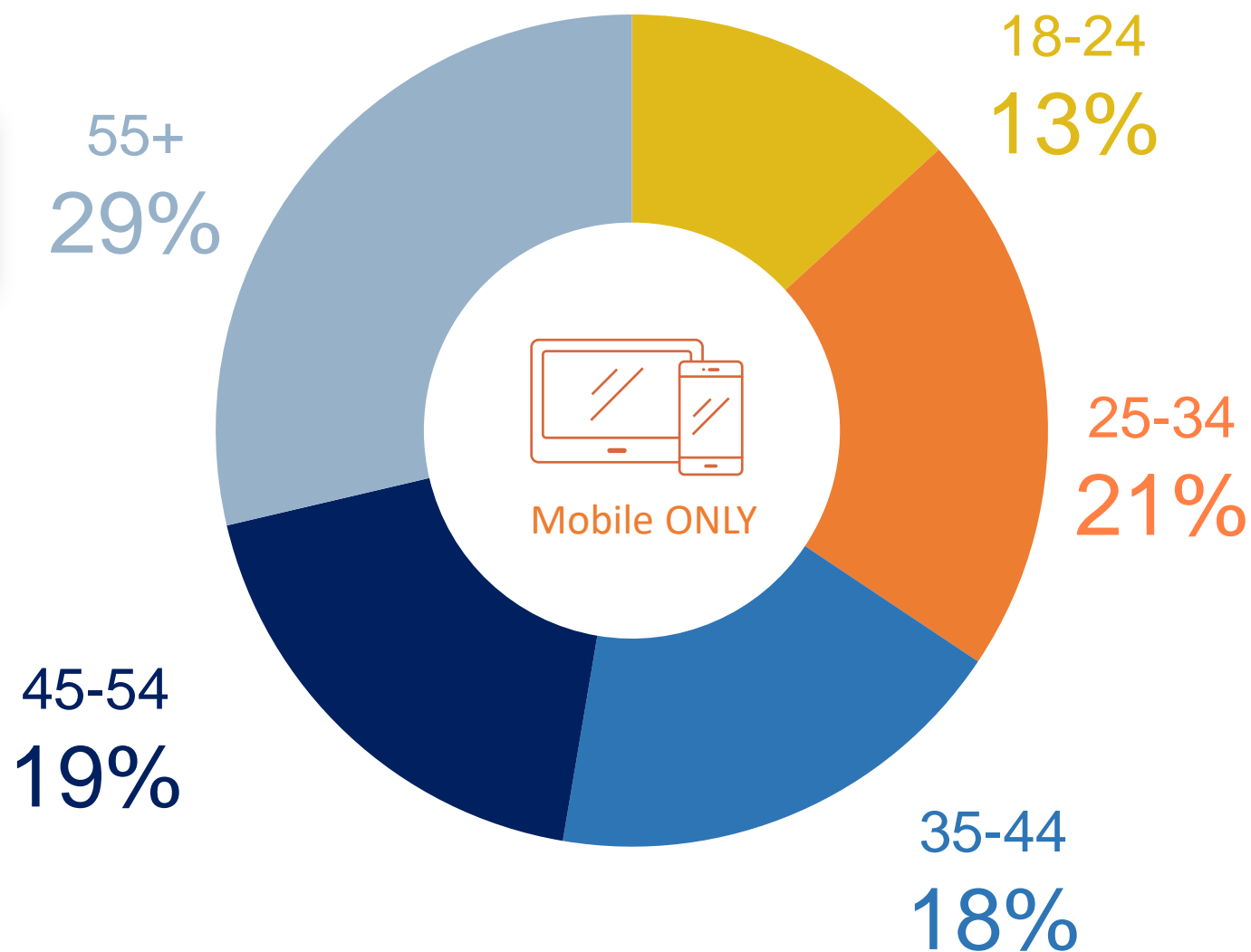
Unique Viewers by Platform by Age & Gender



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

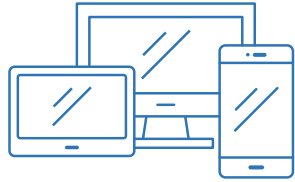




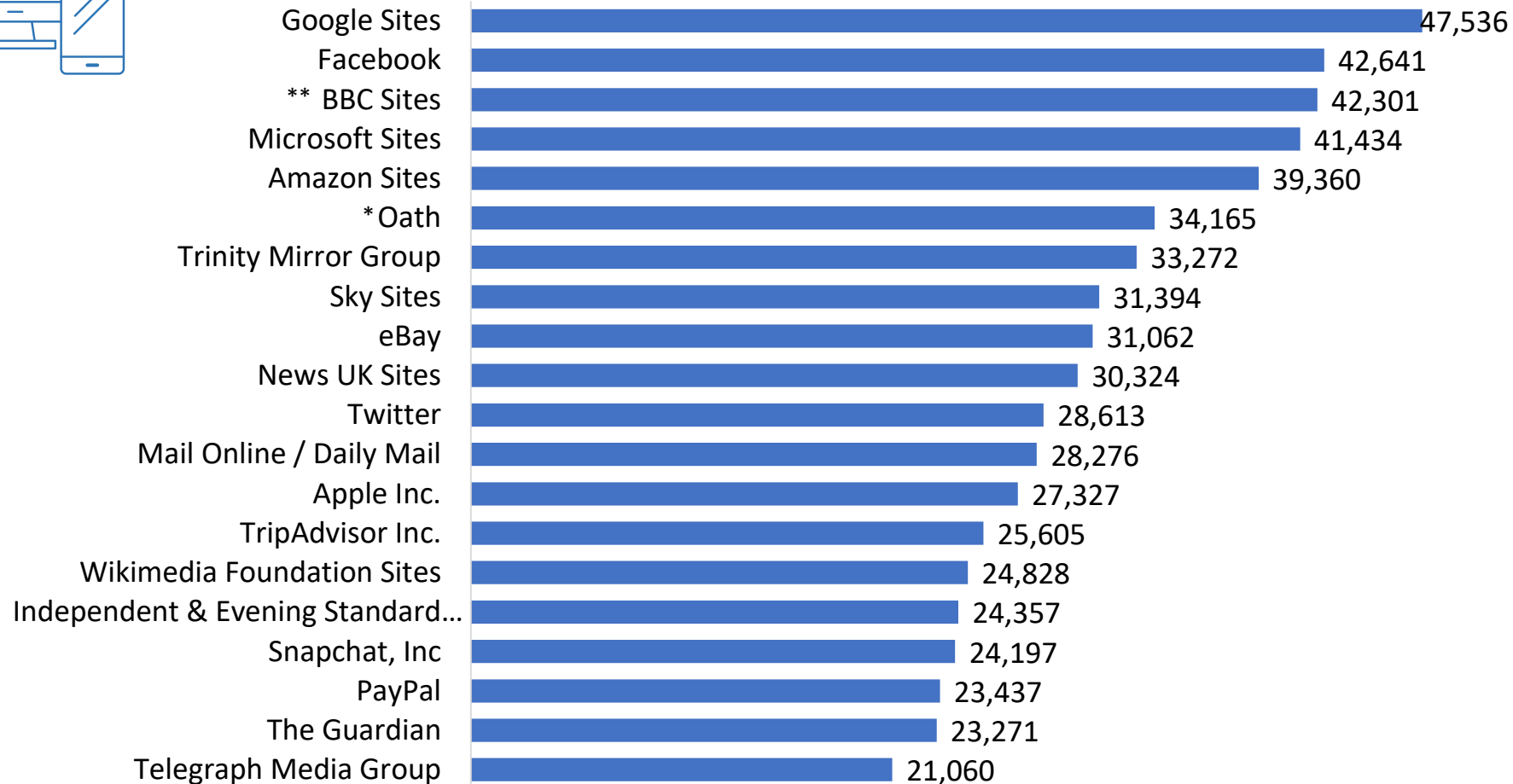
Top Properties: Total Digital Population

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

Google reaches 98% of the UK Online population



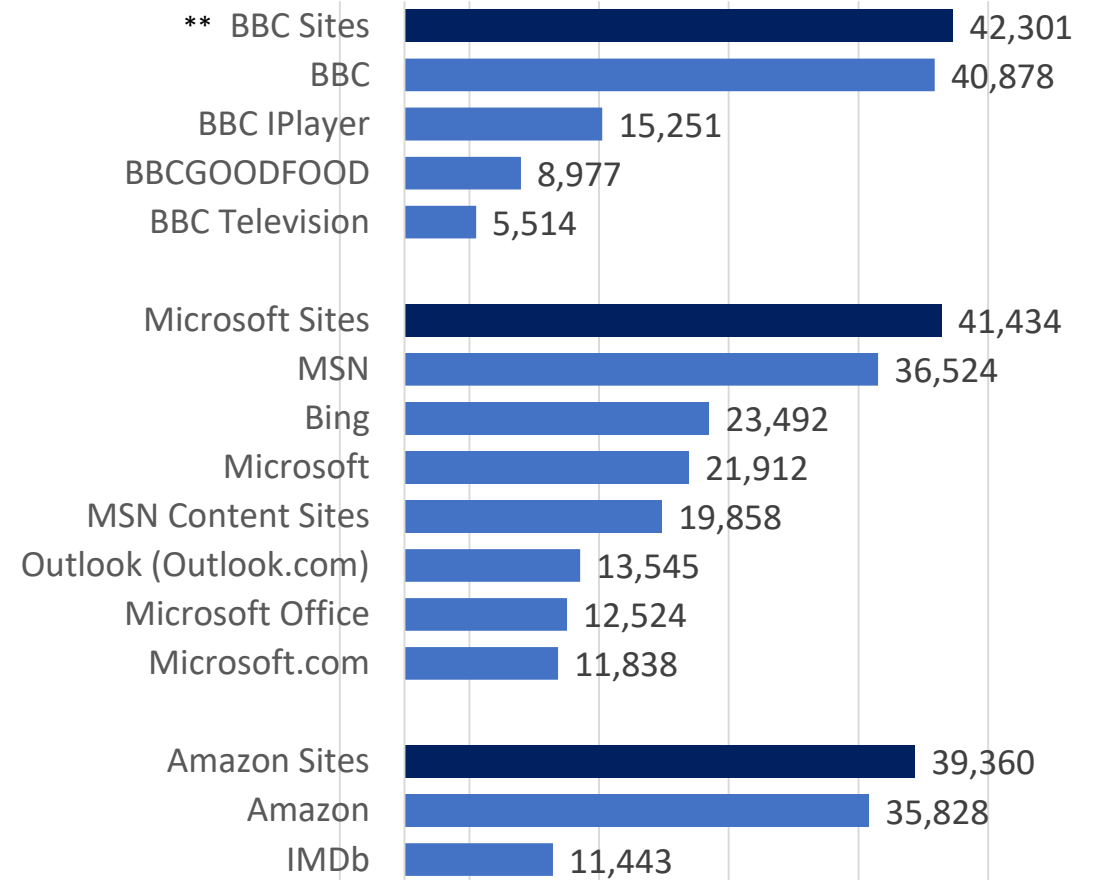
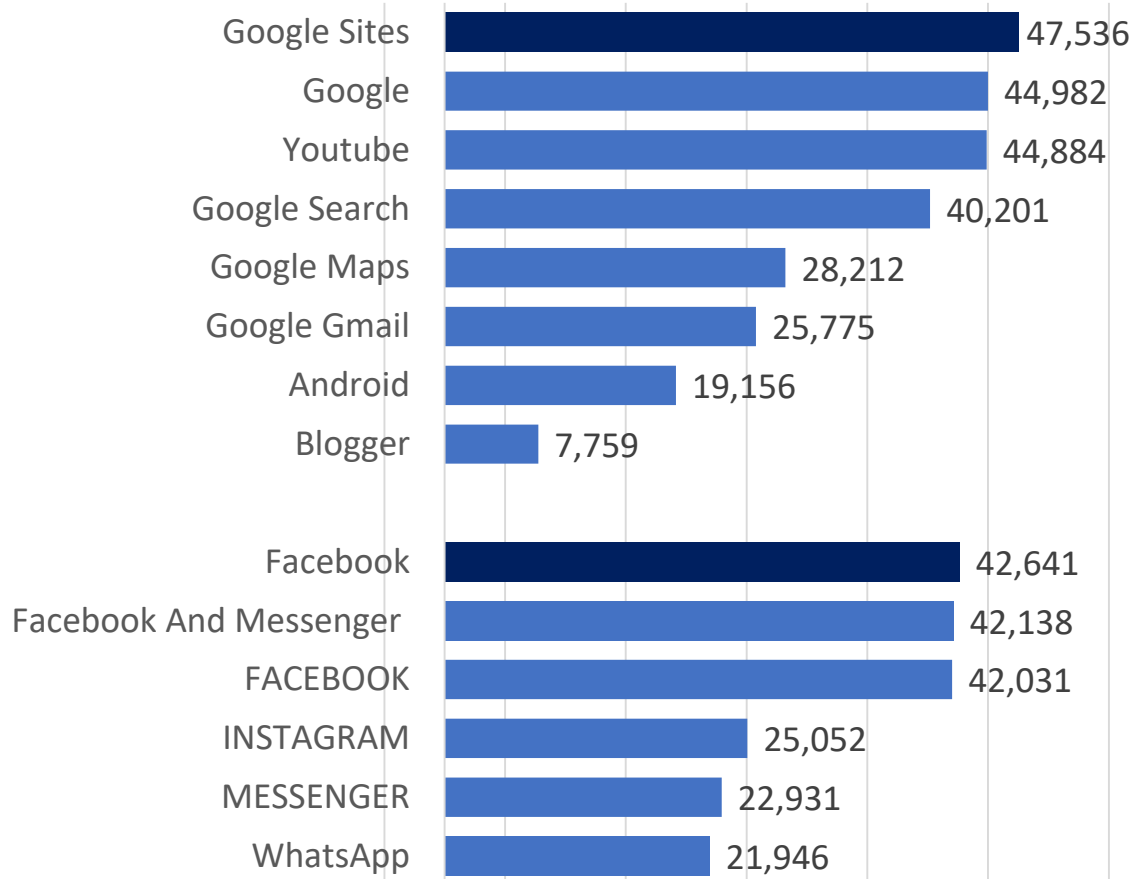
Total Unique Visitors/Viewers (000s) = 48,708



The top 5 properties
all have online reach
over 80%

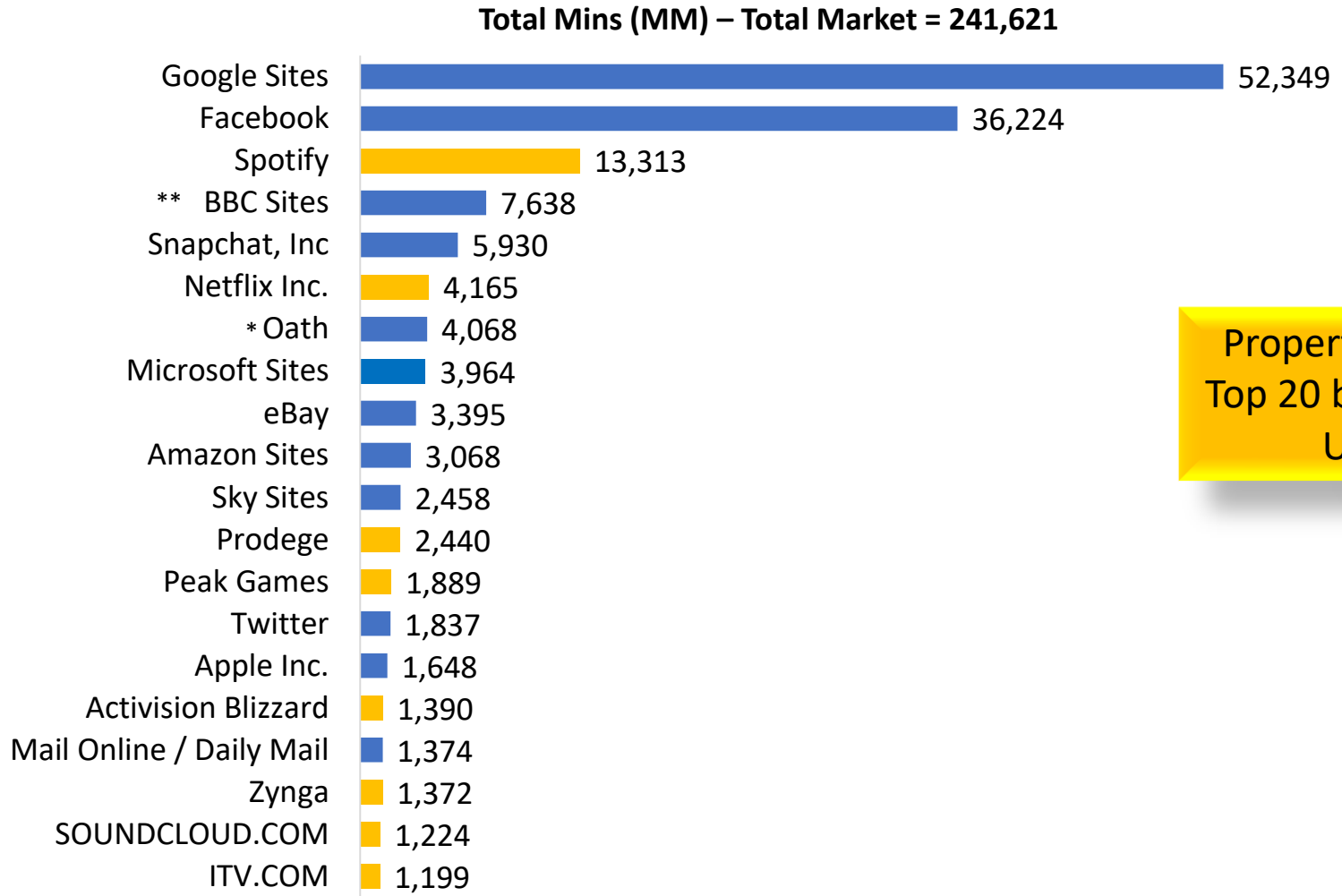
Audience Breakdown of Top 5 Sites

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



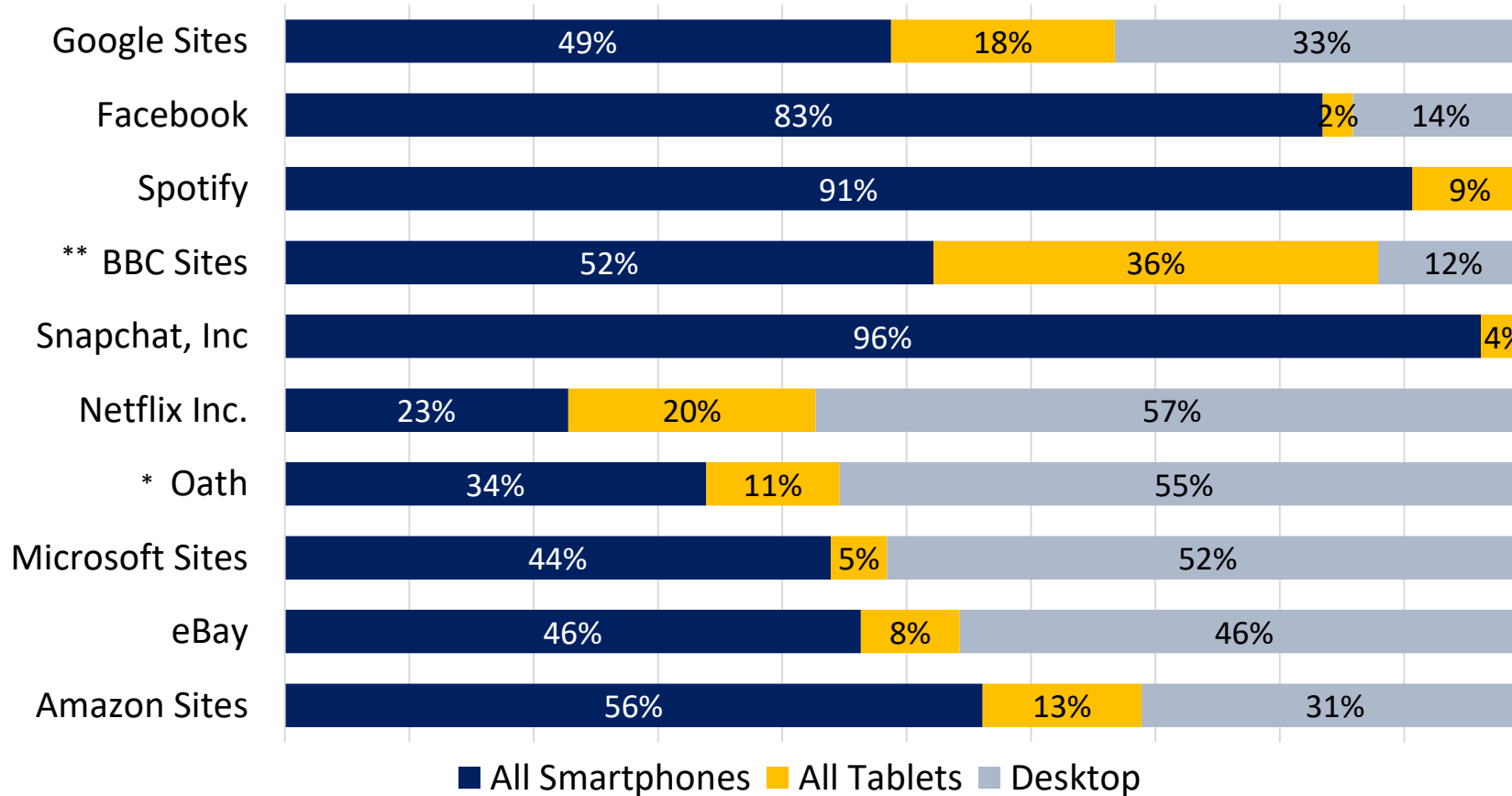
Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

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



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



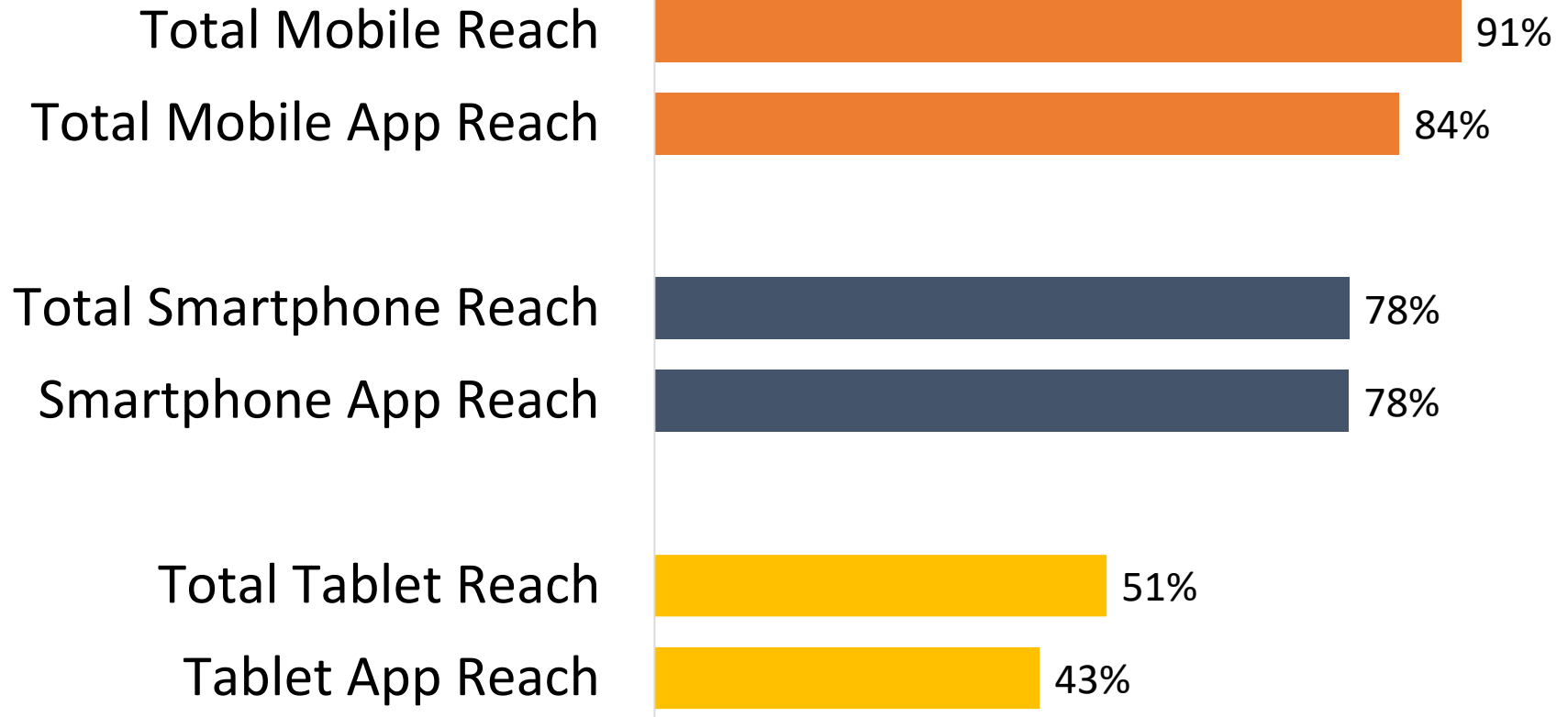
Mobile usage

Mobile Reach by Platform & Access

91% of the UK online adult population use mobile apps



Reach of Online UK Population – June 2018



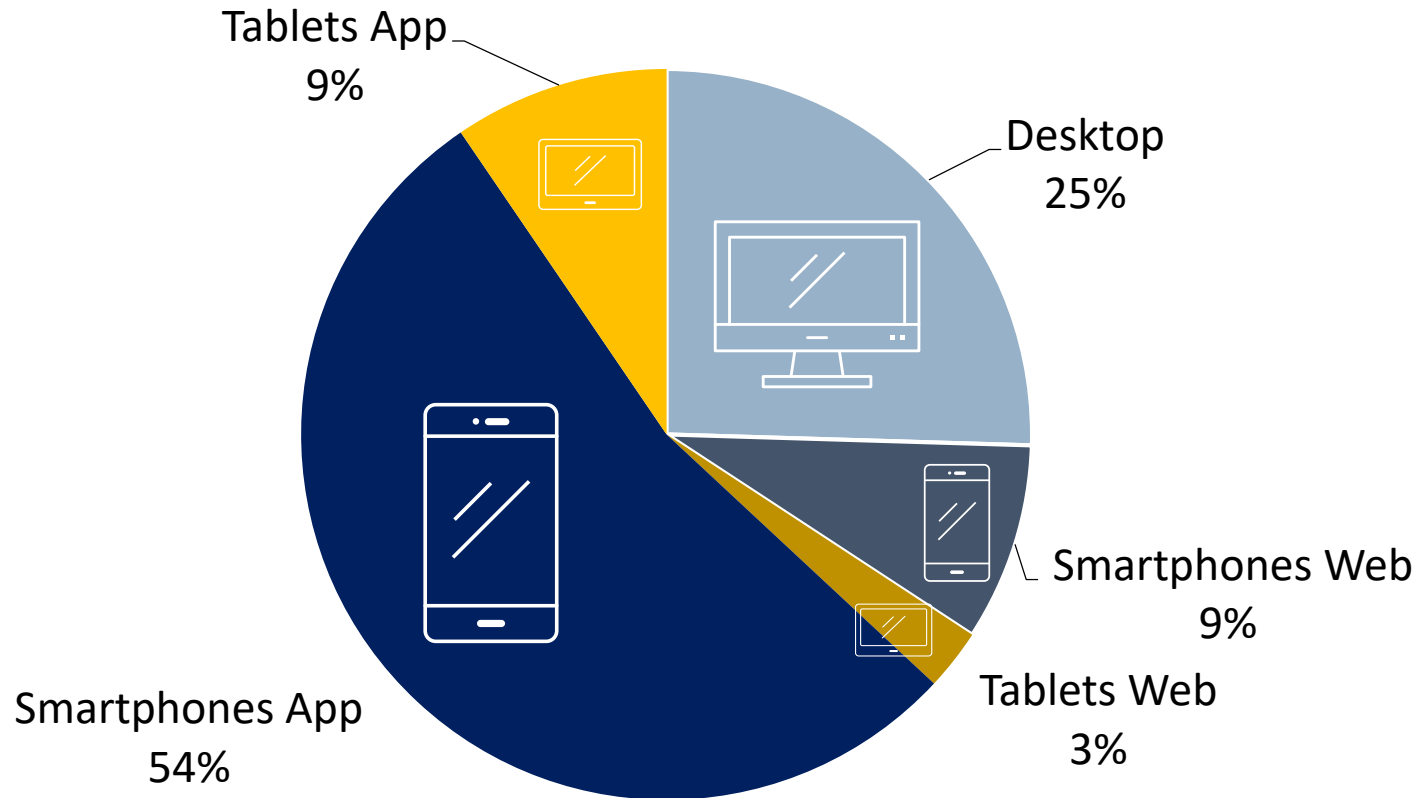
Source: comScore MMX Multi-Platform, June 2018, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

*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 63% of all Minutes

Share of Total Minutes



Mobile Apps account for **63%** of ALL minutes & **85%** of MOBILE minutes



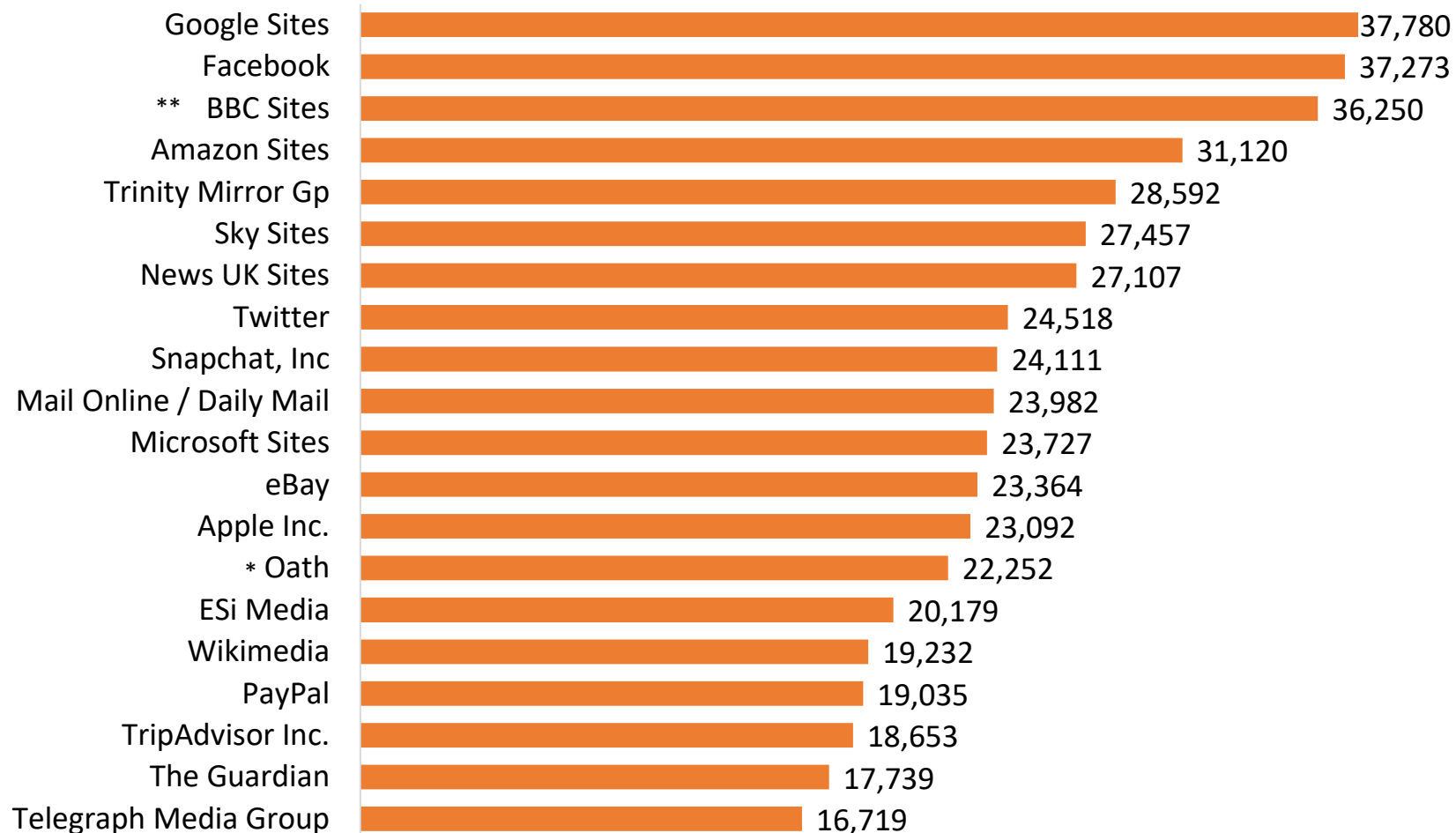
Top Properties: Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

39m adults accessed mobile content in June 2018 (via browser and app)



Total Unique Visitors/Viewers (000s) – Total Mobile (18+) = 39,076

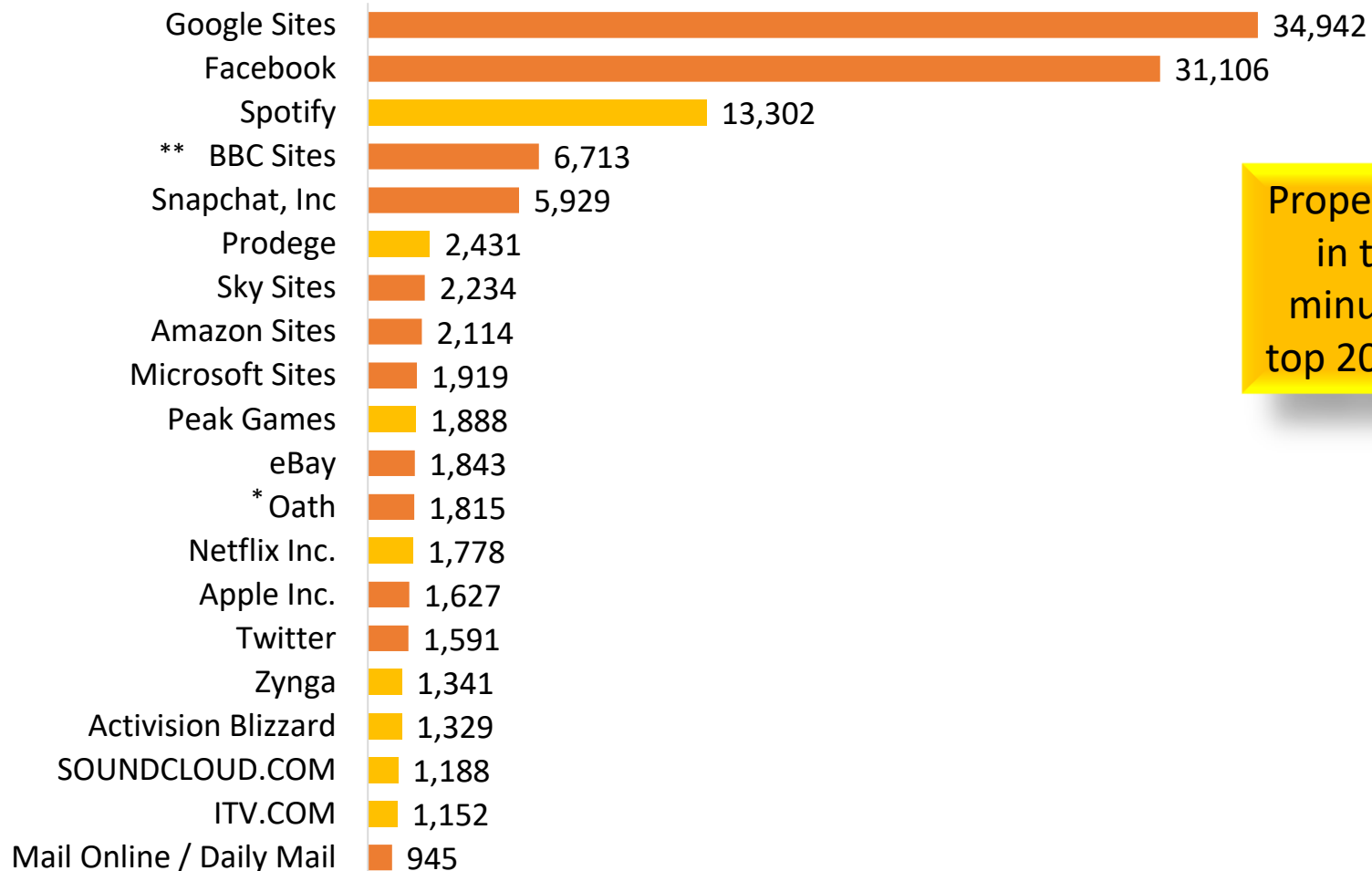


Top 20 Mobile Properties ranked by minutes

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



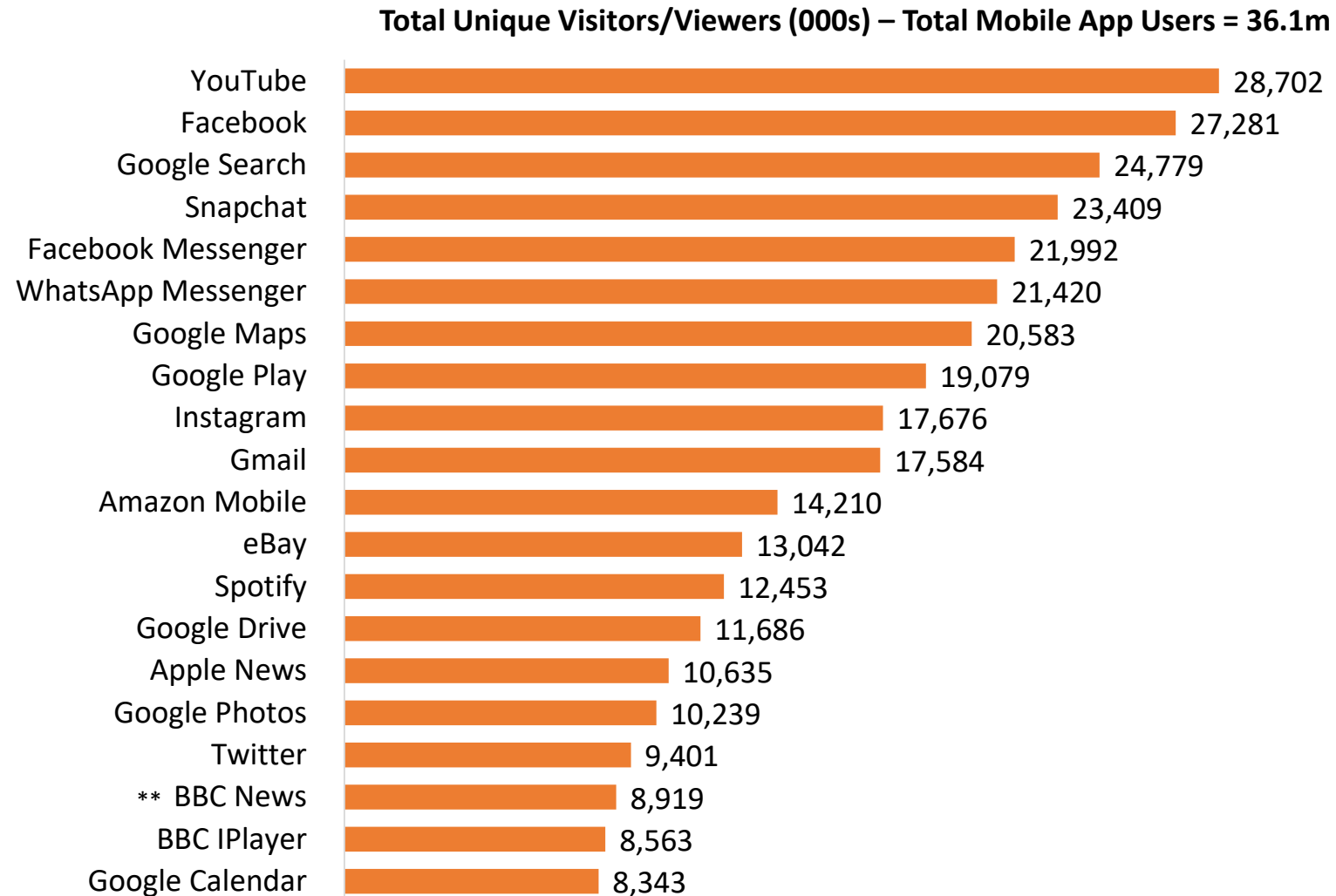
Total Mins (MM) – Total Market = 177,096



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

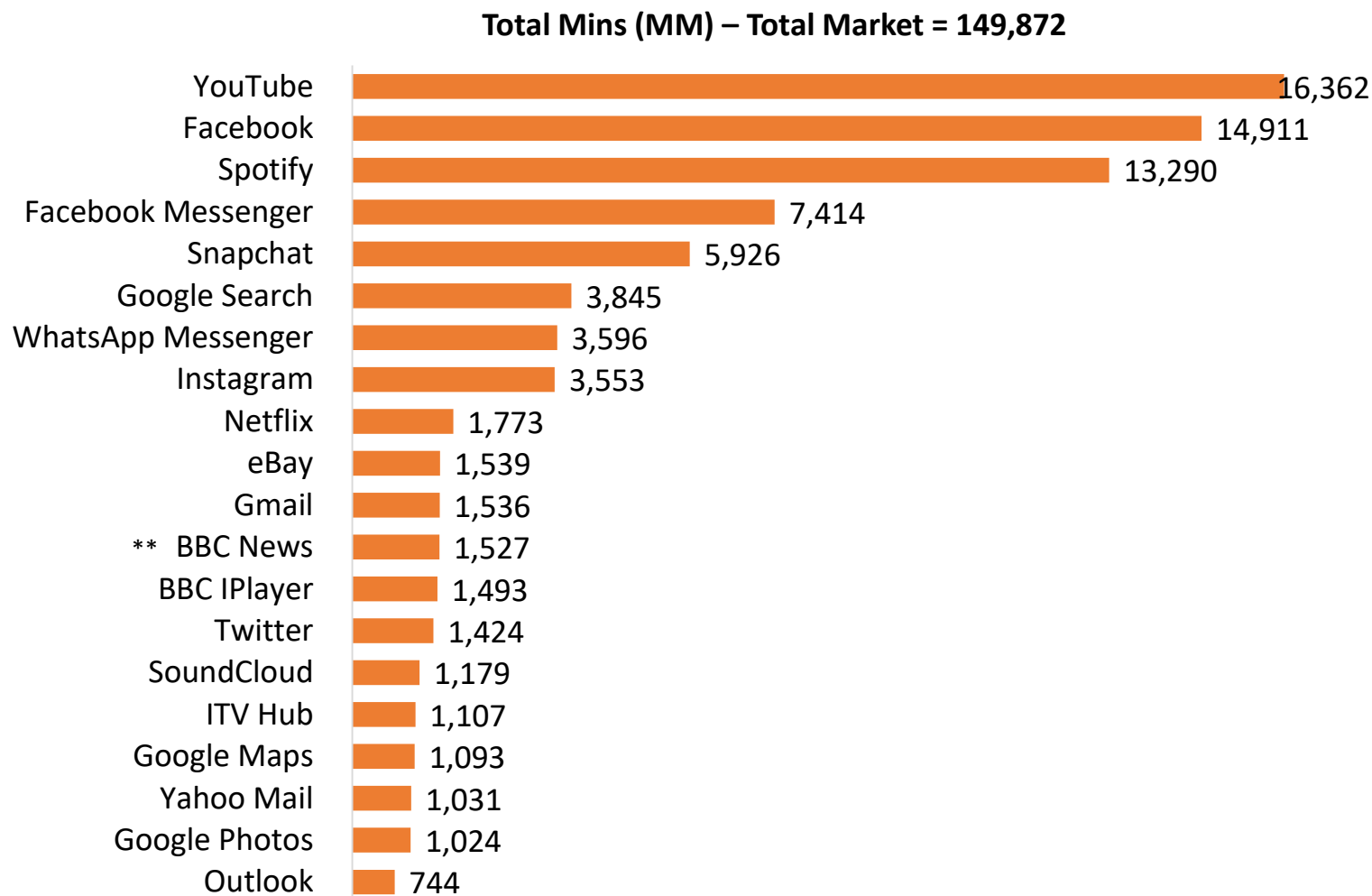
Top 20 Mobile Apps (Tablet & Smartphone) ranked by Unique Visitors

Global Brands dominate top 20 Apps



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

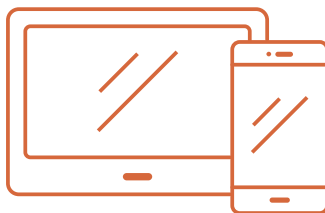
Spotify & Netflix are in the top 10 for minutes spent on apps



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



Smartphone Top 10



Tablet Top 10



	(Million)
YouTube	28.7
Facebook	27.3
Google Search	24.8
Snapchat	23.4
Facebook Messenger	22.0
WhatsApp Messenger	21.4
Google Maps	20.6
Google Play	19.1
Instagram	17.7
Gmail	17.6

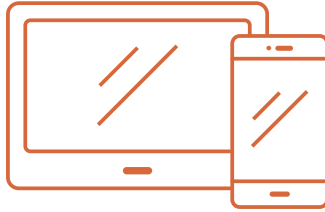
	(Million)
• YouTube	24.6
• Facebook	24.1
• Google Search	22.5
• WhatsApp Messenger	21.3
• Facebook Messenger	20.9
• Google Maps	19.3
• Google Play	19.1
• Snapchat	17.6
• Gmail	16.5
• Instagram	15.4

	(Million)
• Snapchat	7.8
• YouTube	5.9
• Facebook	4.4
• BBC IPlayer	4.1
• Google Search	3.3
• Instagram	3.1
• Netflix	2.2
• BBC Weather	2.0
• Apple News	2.0
• Spotify	1.9

Top 10 Mobile Apps by Minutes by Mobile Platform

Spotify, Netflix & Ebay enter the top 10 for Minutes

Total Mobile Top 10



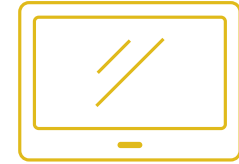
	(Million)
YouTube	16.4
Facebook	14.9
Spotify	13.3
Facebook Messenger	7.4
Snapchat	5.9
Google Search	3.8
WhatsApp Messenger	3.6
Instagram	3.6
Netflix	1.8
eBay	1.5

Smartphone Top 10



	(Million)
Facebook	14.3
Spotify	12.1
YouTube	10.9
Facebook Messenger	7.4
Snapchat	5.7
WhatsApp Messenger	3.6
Instagram	3.5
Google Search	2.9
eBay	1.4
Gmail	1.3

Tablet Top 10



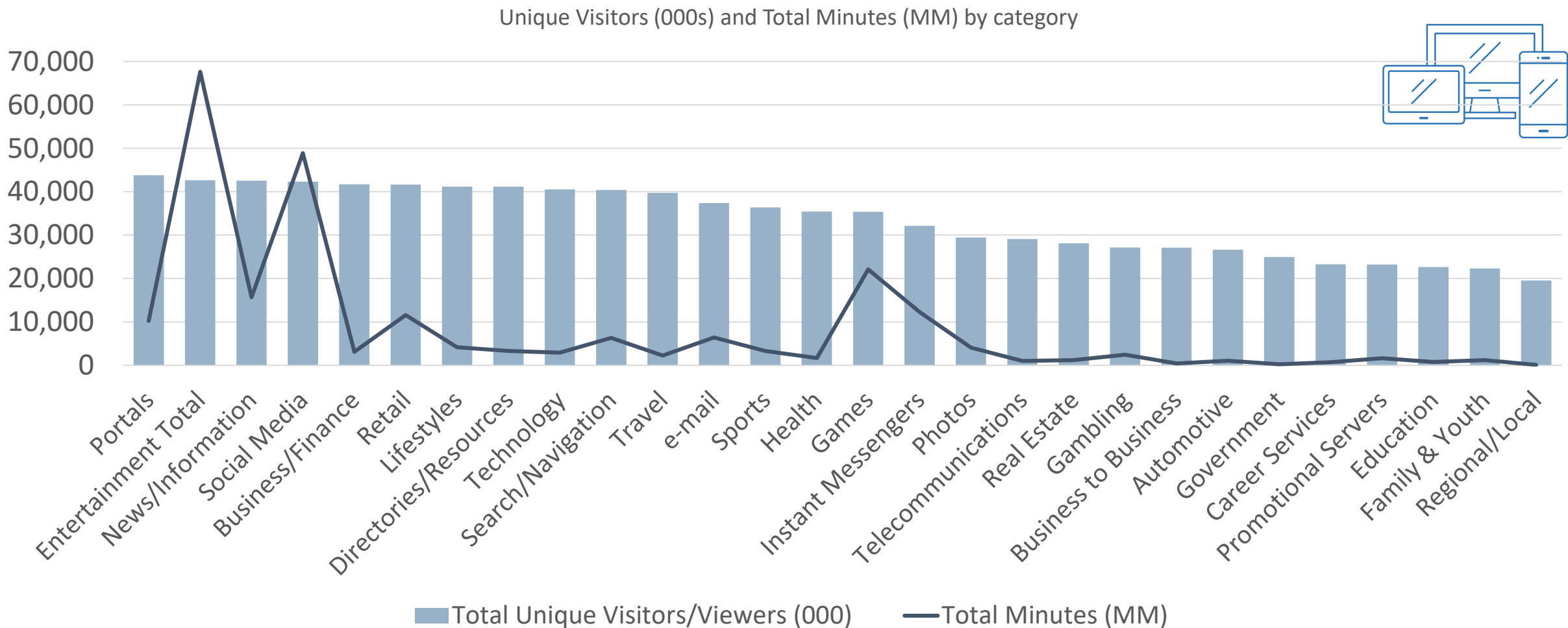
	(Million)
YouTube	5.5
Spotify	1.2
Google Search	1.0
BBC IPlayer	0.9
Netflix	0.8
ITV Hub	0.7
Facebook	0.6
Sky Go	0.4
YouTube Kids	0.4
**BBC News	0.3



Categories

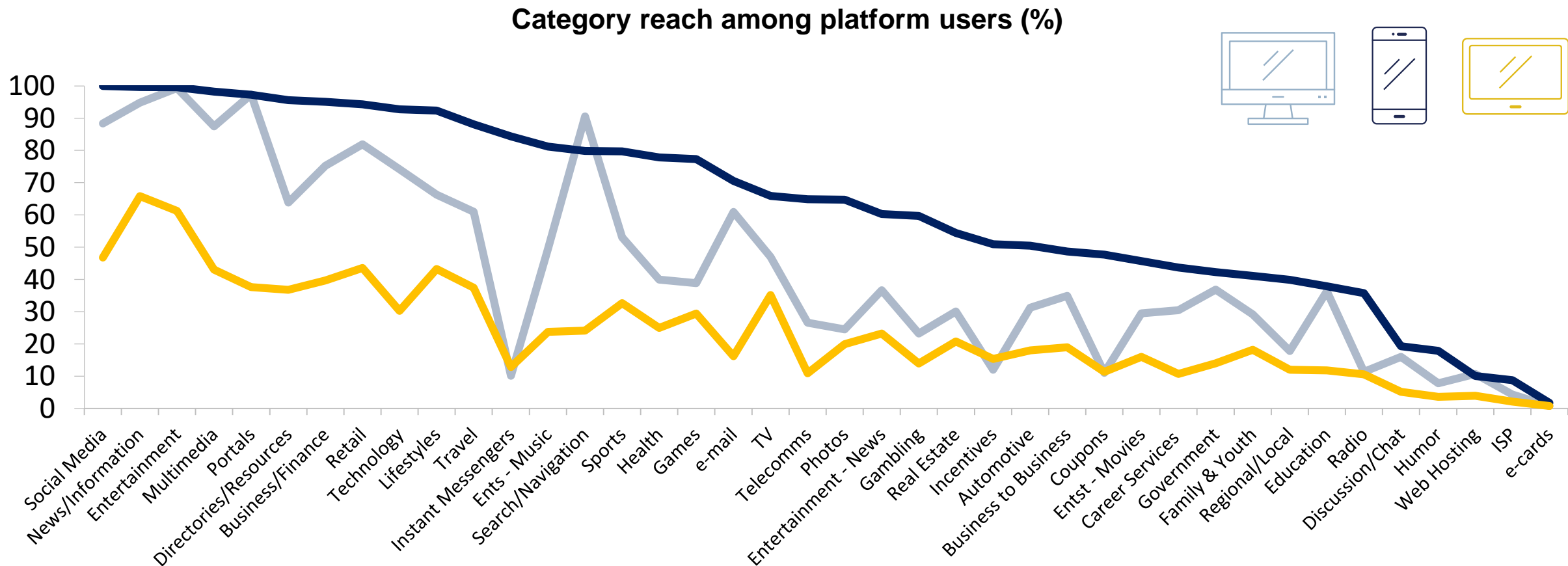
Major Categories Online – Unique Visitors v Minutes

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, June 2018, 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

26%

Auctions	83%
Education	81%
Computer Hardware	74%
Car Rental	72%
Entertainment - Movies	68%
Business to Business	68%
Government	67%
Computer Software	65%
Politics	63%
Automotive	61%
Airlines	60%
Home Furnishings	60%
Blogs	56%
Flowers/Gifts/Greetings	56%
Financial Information/Advice	56%



Smartphone total

62%

Instant Messengers	99%
Job Search	95%
Gay/Lesbian	93%
Photos	92%
Coupons	89%
Books	89%
Maps	88%
Entertainment - Music	87%
Health	84%
Personals	83%
Social Media	83%
Religion/Spirituality	83%
Retail - Music	77%
Technology	76%
Lifestyles	76%



Tablet total

12%

TV	49%
Radio	35%
Kids	33%
General News	32%
Family & Youth	25%
Toys	21%
Online Gaming	20%
Retail - Music	18%
Entertainment - Total	17%
Real Estate	17%
Multimedia	17%
Department Stores	16%
Search/Navigation	16%
Family & Parenting	16%
e-cards	15%

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

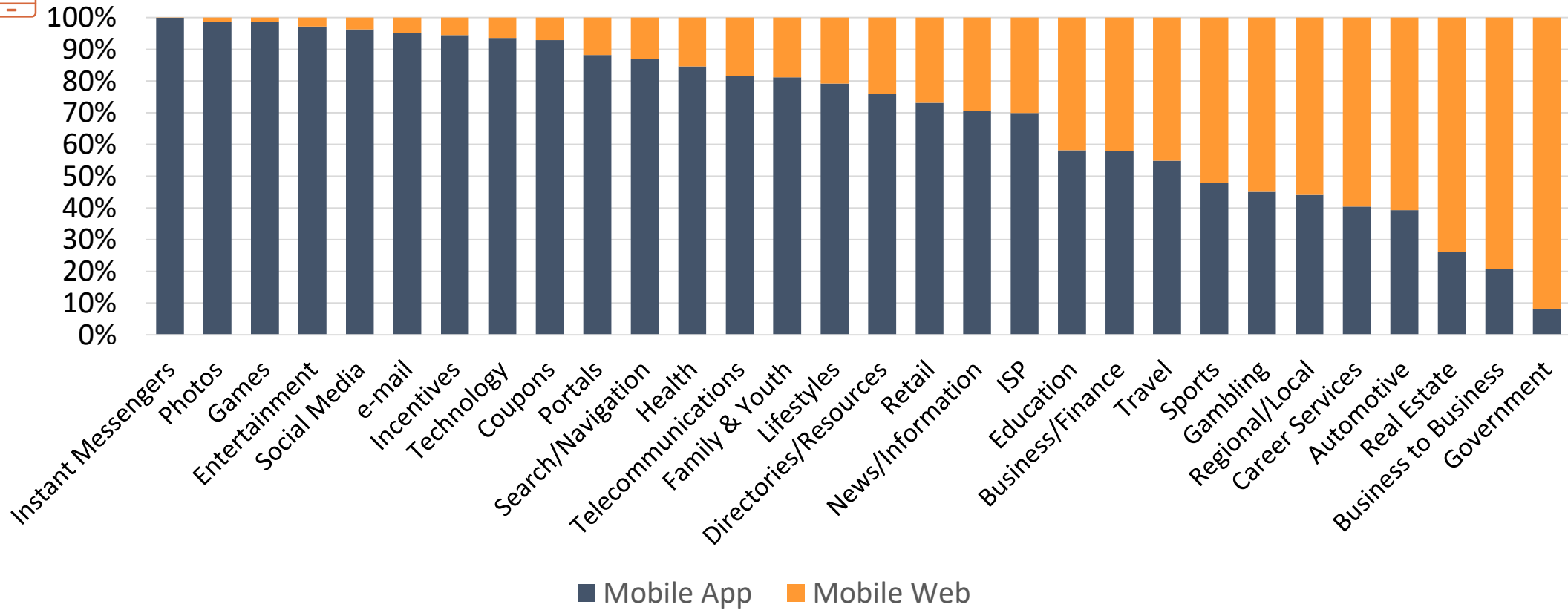
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

Share of Mobile Minutes by Access Type by Category

Mobile App share of minutes varies by content & service



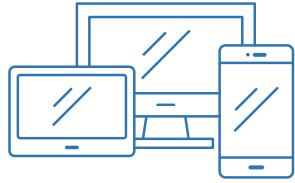
Mobile App V Mobile Web Share of Mobile Minutes





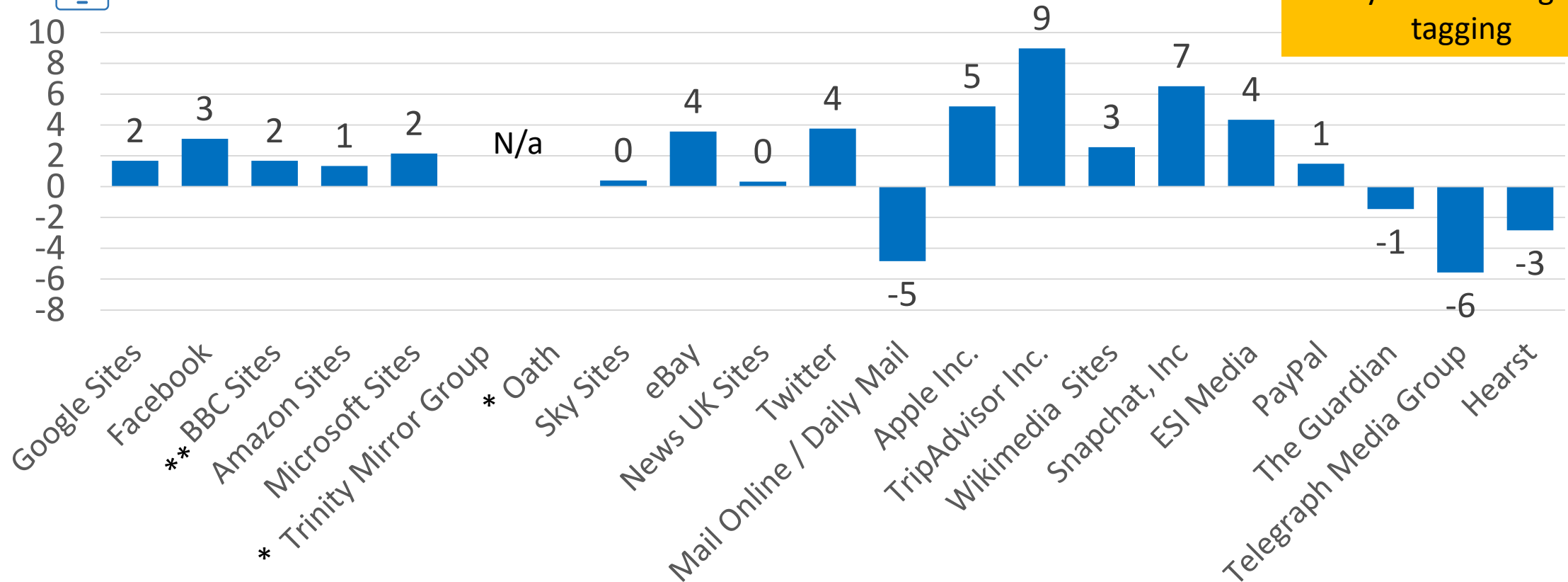
Key Changes: Jun 18 v Mar 18

Top 20 Properties by 'Unique Visitors' - % Growth Jun 18 v Mar 18



Unique Visitor % Growth June 2018 v March 2018

Trinity Mirror and Oath Trend data is N/A as they had a change in tagging



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

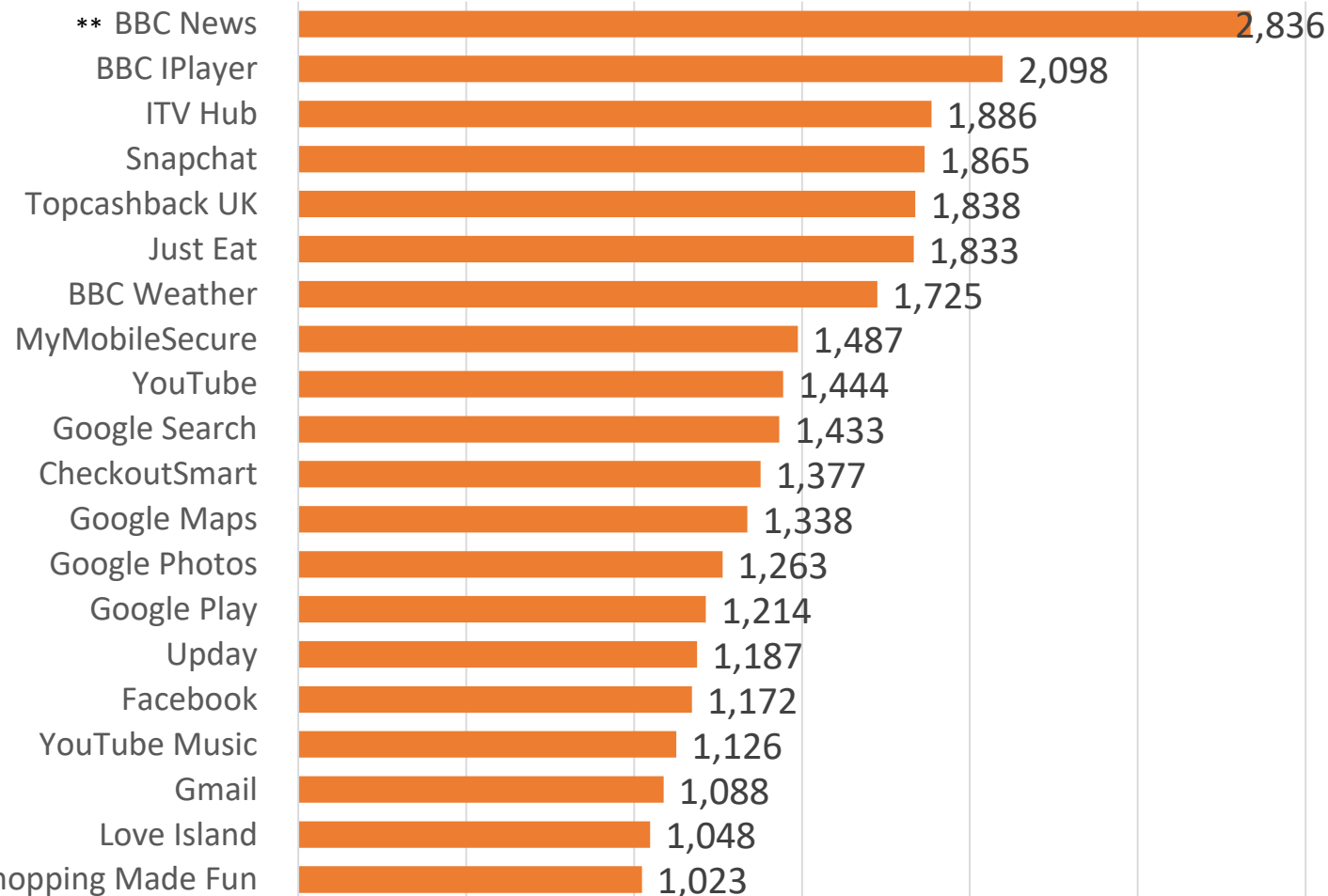
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

*Oath May 2018 – June 2018 was under-reported due to a tagging issue and Trinity Mirror was over-reported in March & April so UKOM has excluded these from the analysis. ** BBC data was impacted by an increase to the BBC News Mobile App due to a tagging issue in June

Mobile Apps which added most Unique Visitors: Mar 18 to Jun 18



Additional 18+ Audience (000s) – Mar 18 to June 18



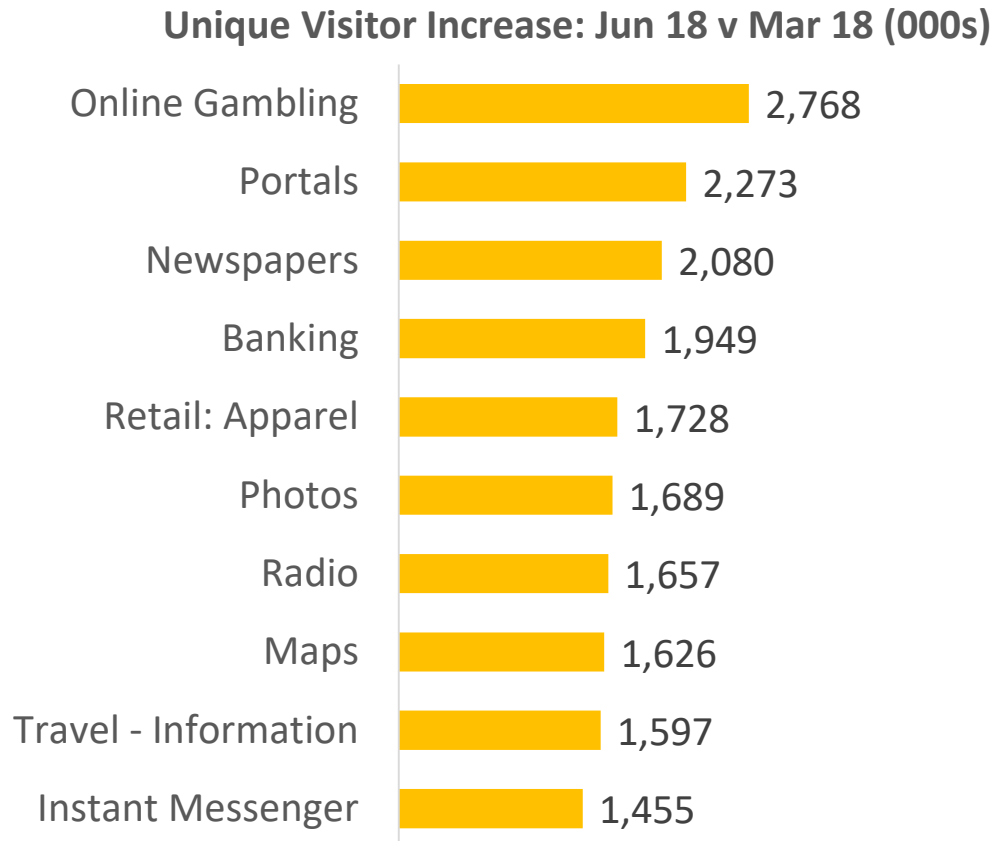
The World Cup, Britain's Got Talent and Love Island may have contributed to the ITV Hub uplift. The ITV Love Island app alone had 1 million viewers by the end of June, and Britain's Got Talent also added 0.7m users between March and June 2018

YouTube Music launched in the UK in June and had 1.1m users by the end of the month

Top Performing Categories based on Visitor Growth June 18 v Mar 18

The World Cup drove up visitors to Online Gambling Websites in June

Category Growth – Jun 18 v Mar 18



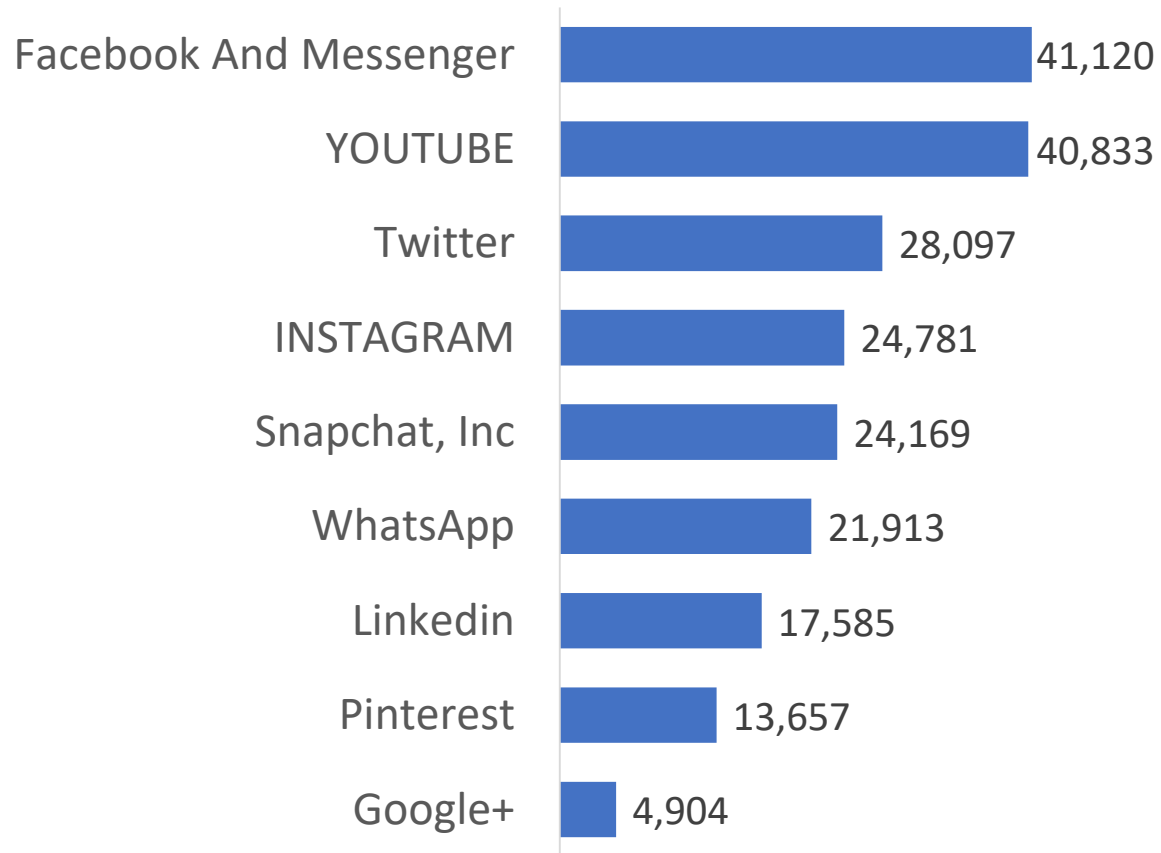
Source: comScore MMX Multi-Platform, June 2018, UK, 18+

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.

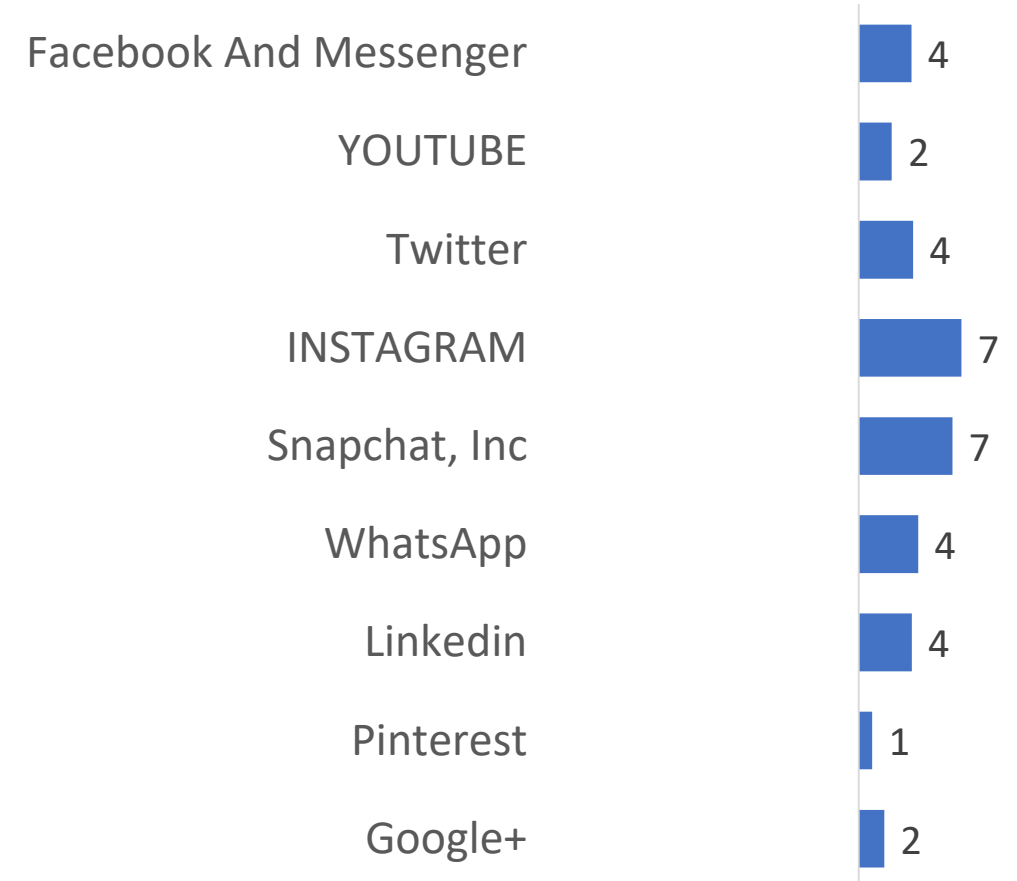
Change in Audience for Social Media Brands

Instagram & Snapchat had biggest gains

Unique Visitors 18+ (000s) - June 2018



Unique Visitors 18+ % Change Jun 18 v Mar 18



Source: comScore MMX Multi-Platform, June 2018, 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.

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 (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

Stay connected

 [comscoreinc](https://www.facebook.com/comscoreinc)

 [@comScoreEMEA](https://twitter.com/comScoreEMEA)

 [comscore-inc](https://www.linkedin.com/company/comscore-inc)

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/