

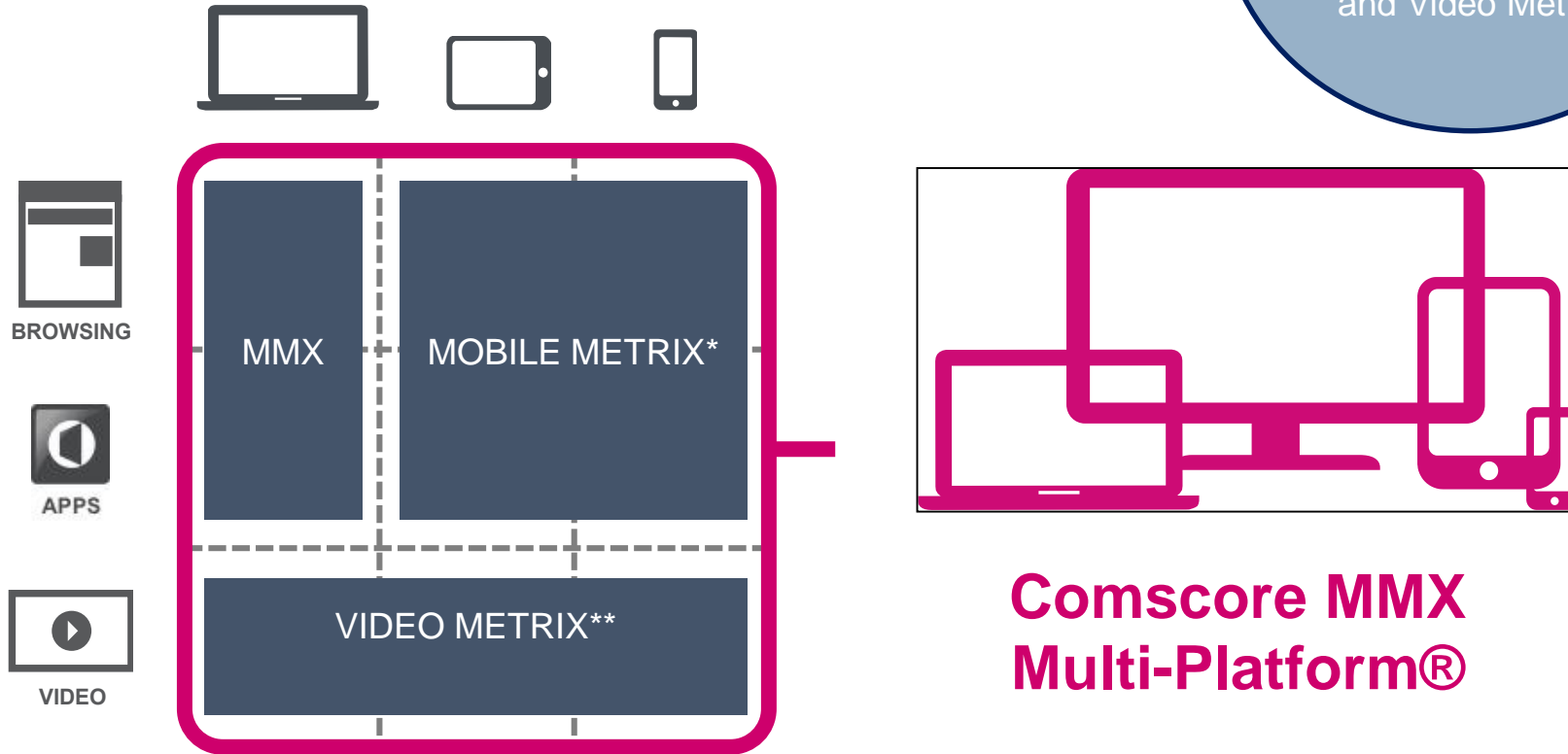
UK Digital Market Overview – September 2018



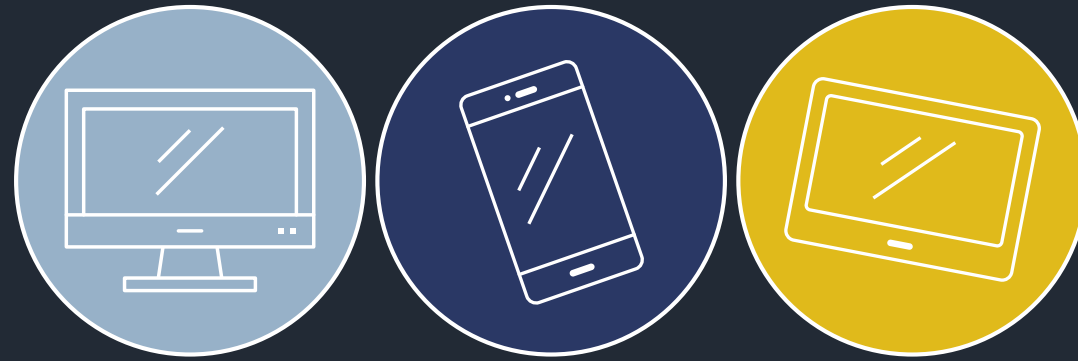
If you have any questions, please
contact: insights@ukom.uk.net

A Guide to Data Sources

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

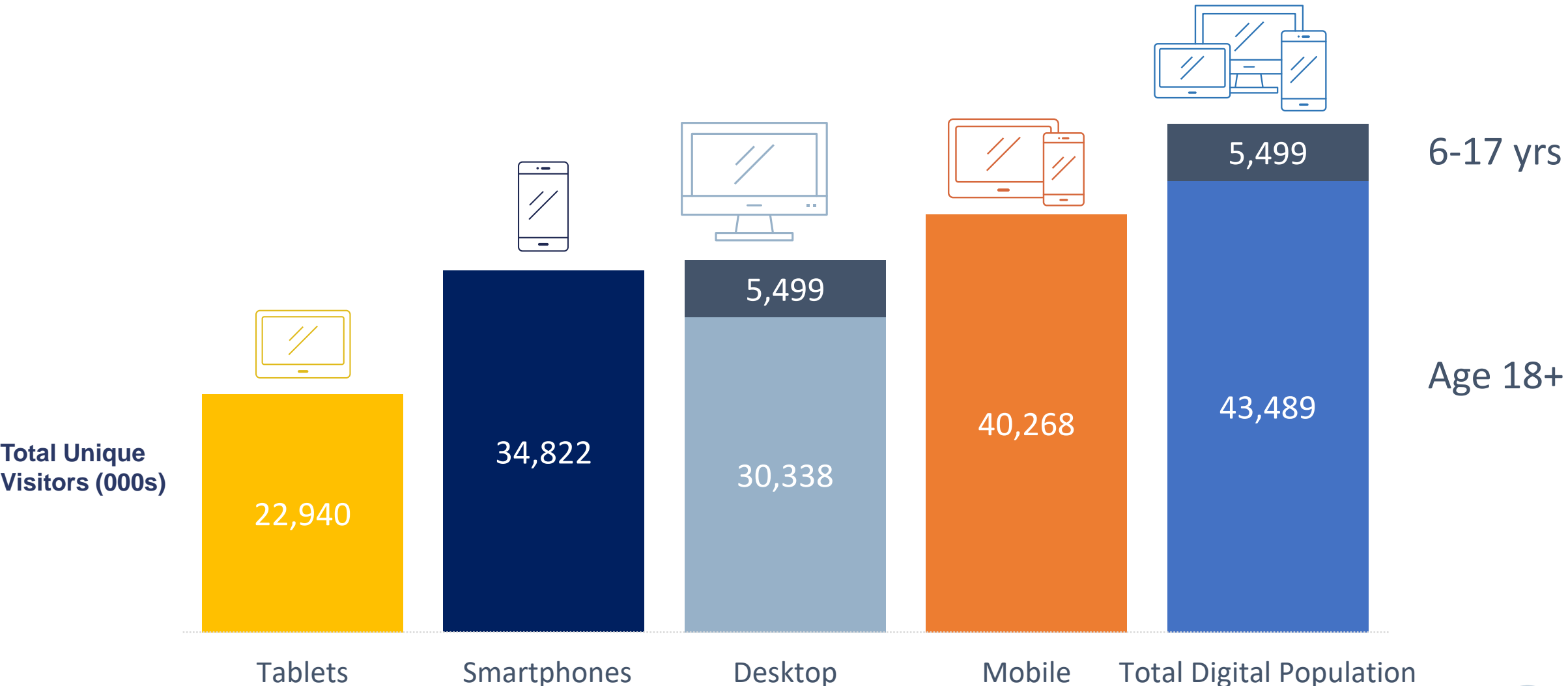


**Comscore MMX
Multi-Platform®**



Usage by Platform

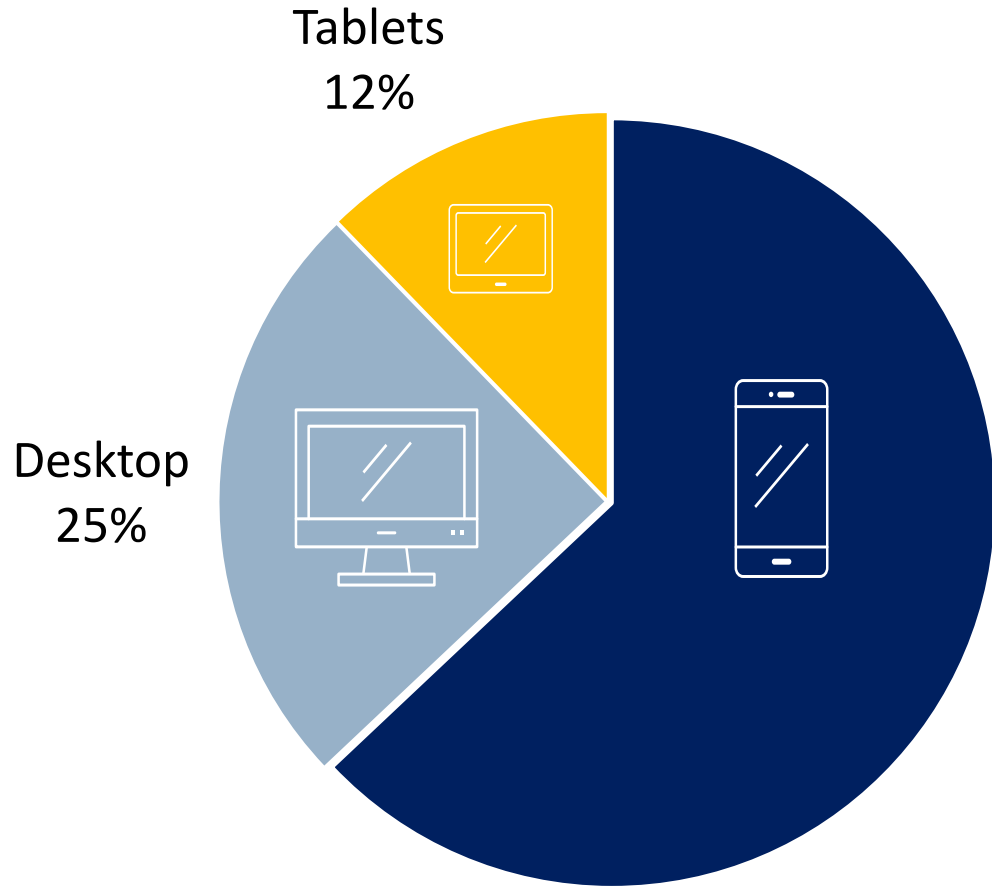
Breakdown of Digital Unique Visitors by Platform



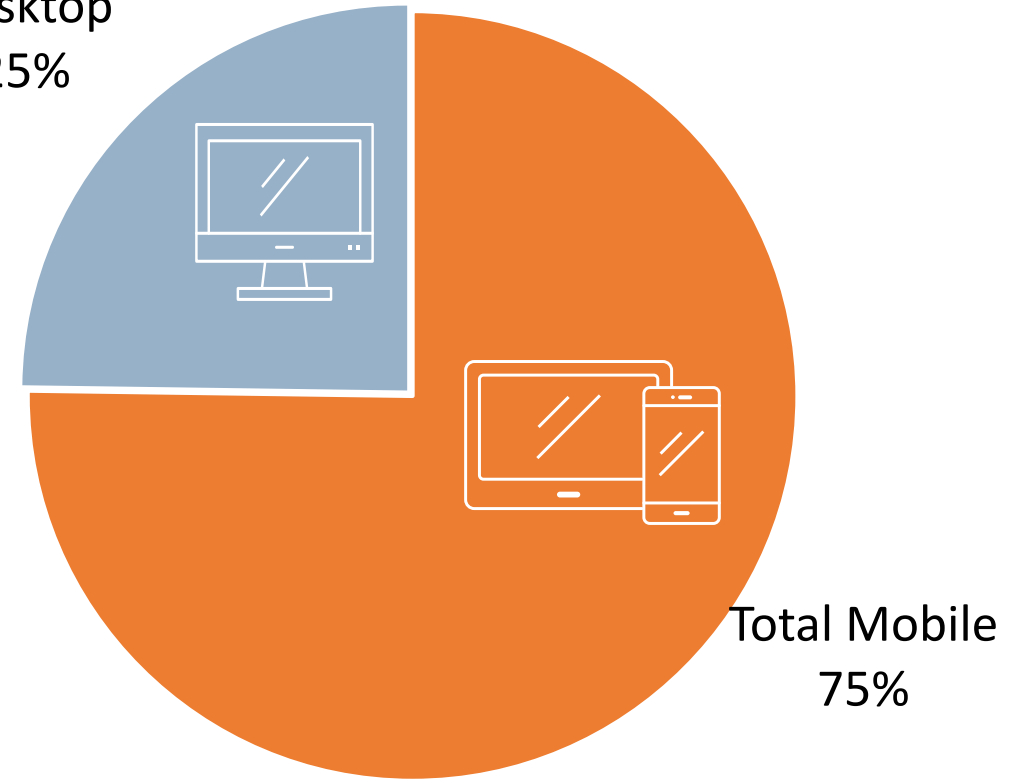
Share of Minutes by Platform

Mobile Devices now account for **75%** of all adult online minutes

Share of Total Minutes 18+



Desktop 25%



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

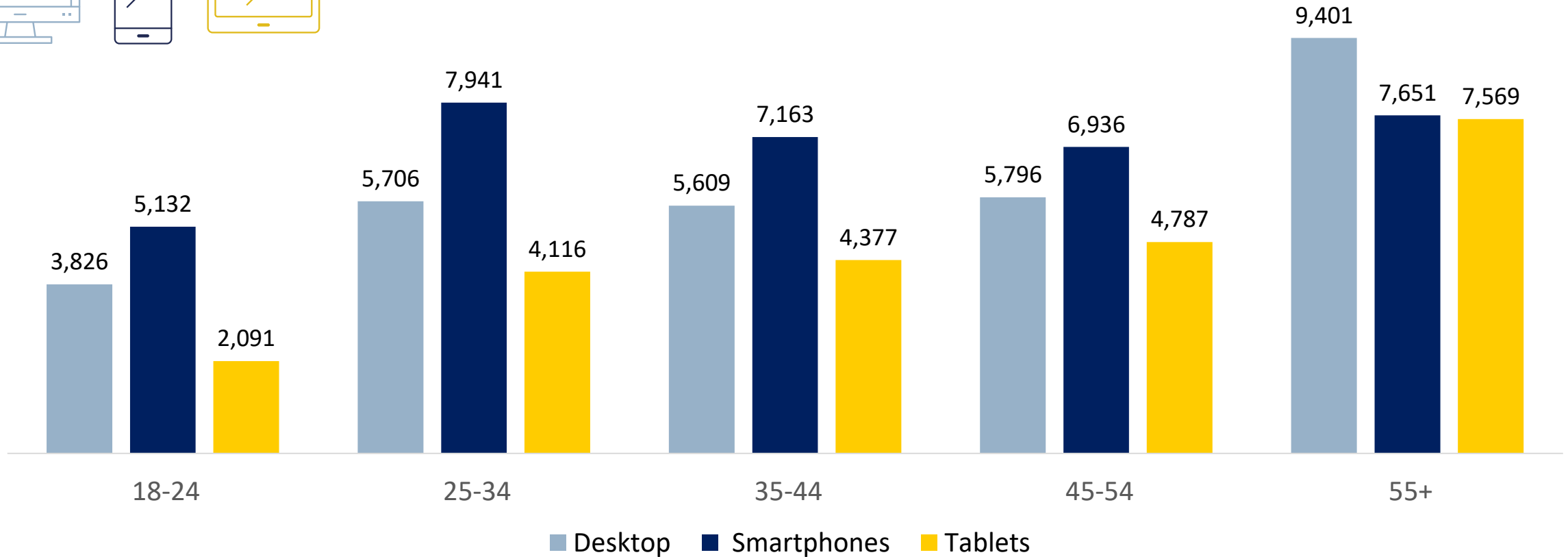
*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Platform Unique Visitors by Age

The Desktop has higher reach amongst Older Audiences

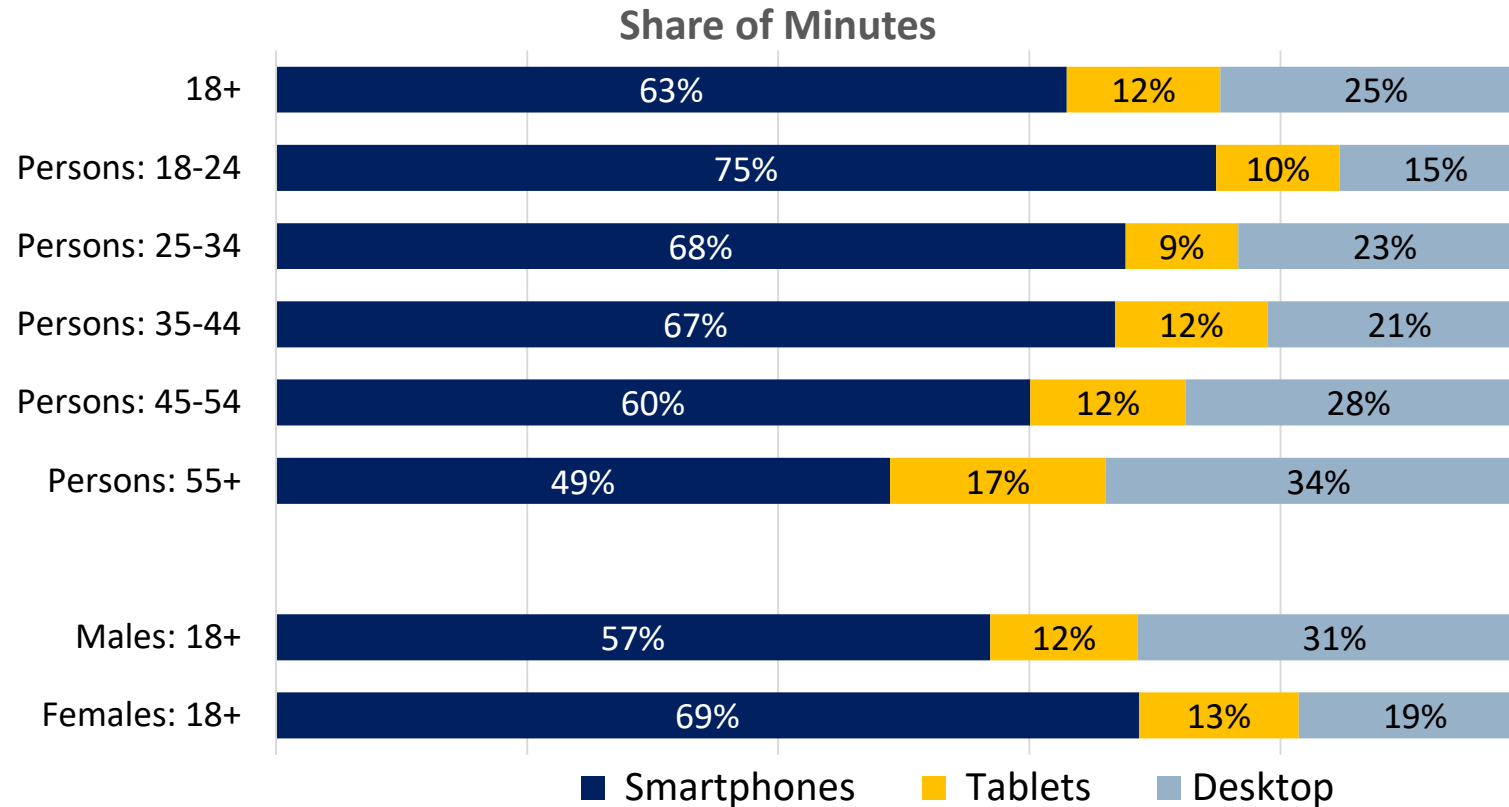


Audience by Platform by Age - Unique Visitors (000s)



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

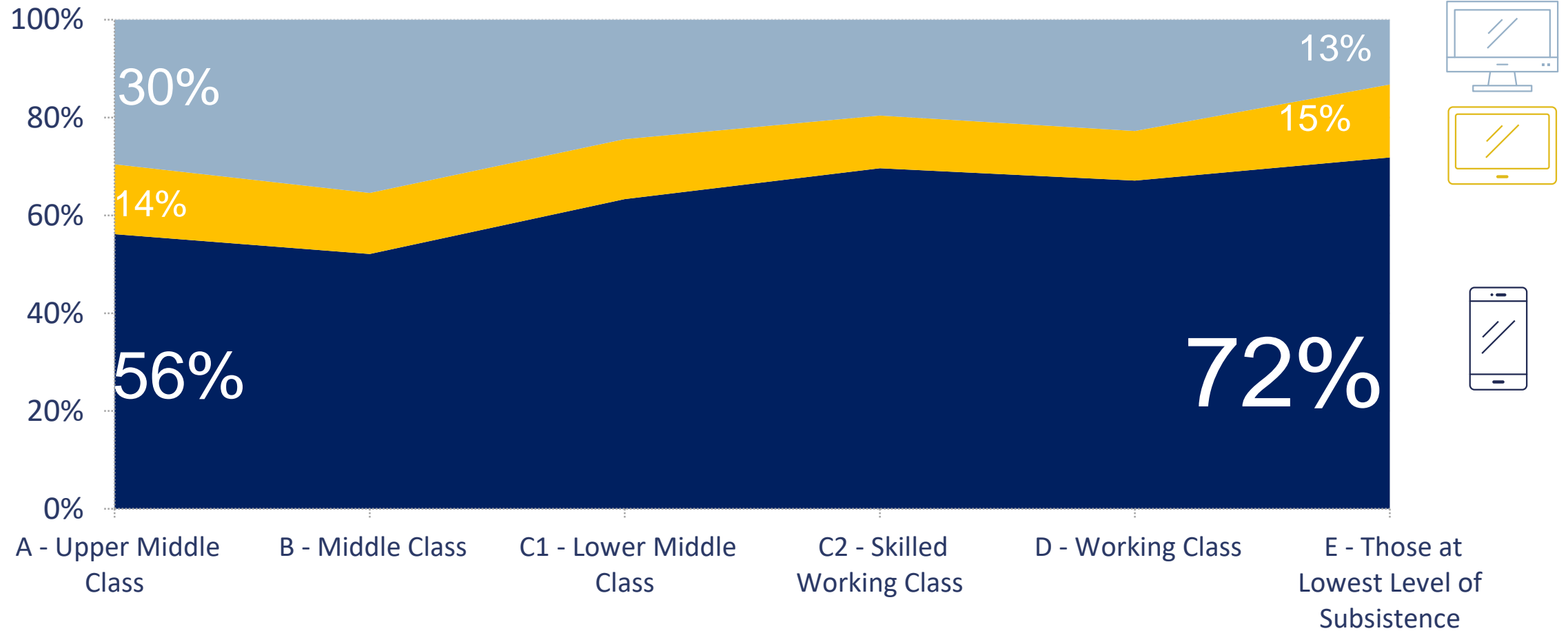
Females 18+ spend 82% of their time online on mobile devices compared to only 69% for males.



Platform Share of Time Online by Social Grade

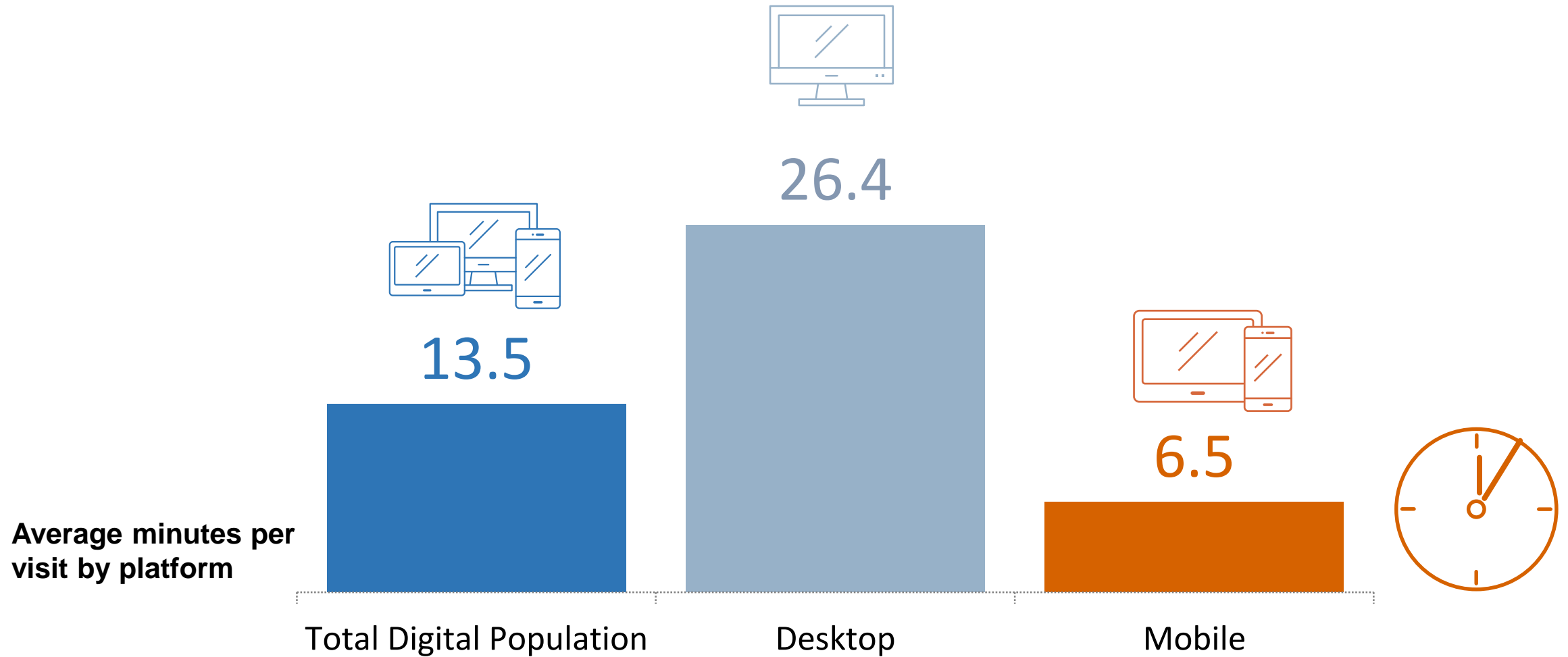
Smartphone share increases with decreasing social grade

Platform Share of Minutes by Social Grade



Average Minutes per Visitor by Platform

Mobile visits are **shorter**



Average minutes per visit by platform

Total Digital Population

Desktop

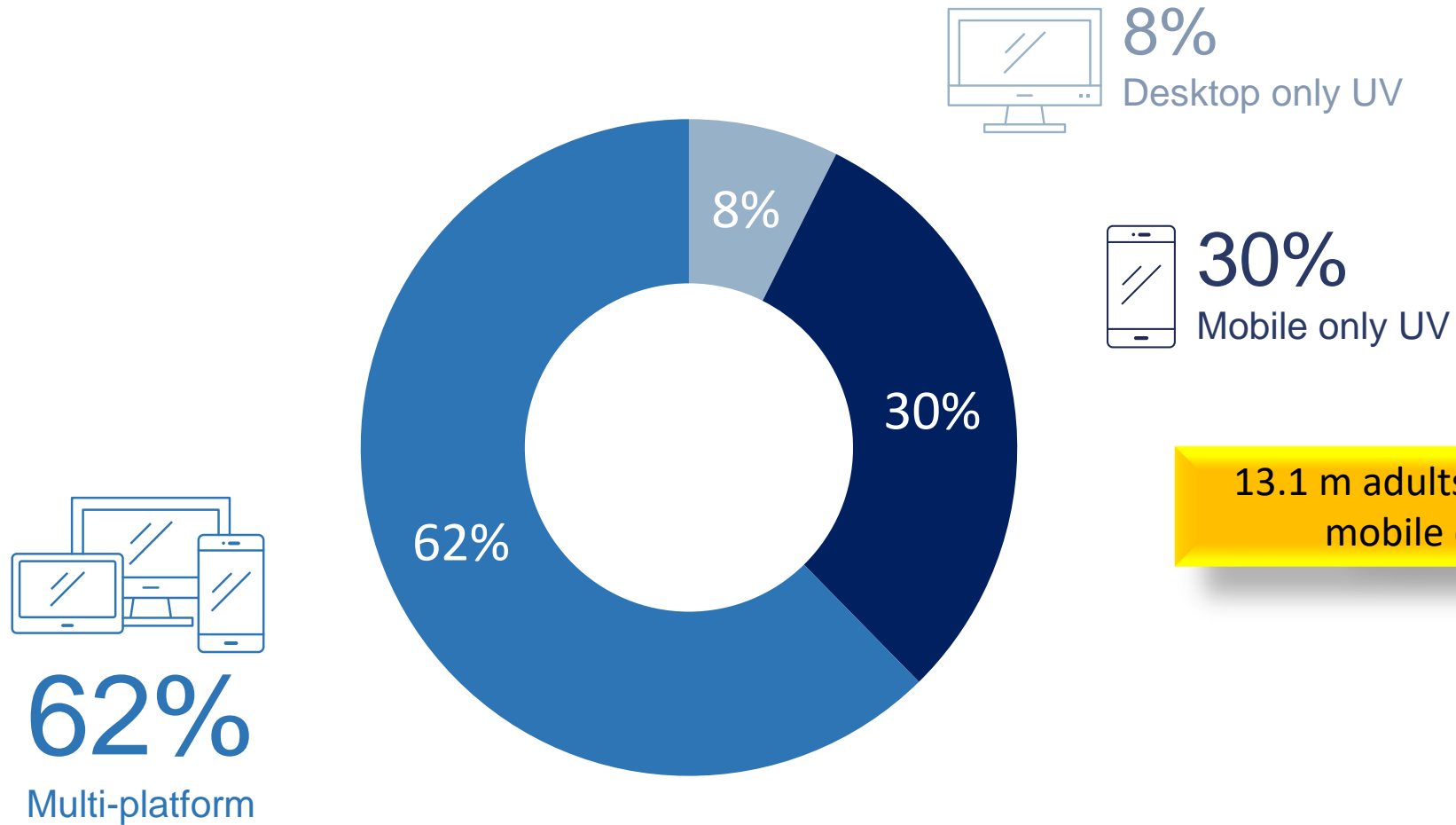
Mobile



Multi-Platform Usage

Multi-Platform Usage

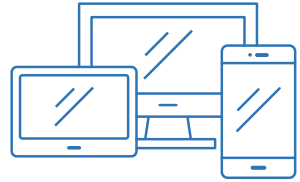
30% of Online Adults are now Mobile Only



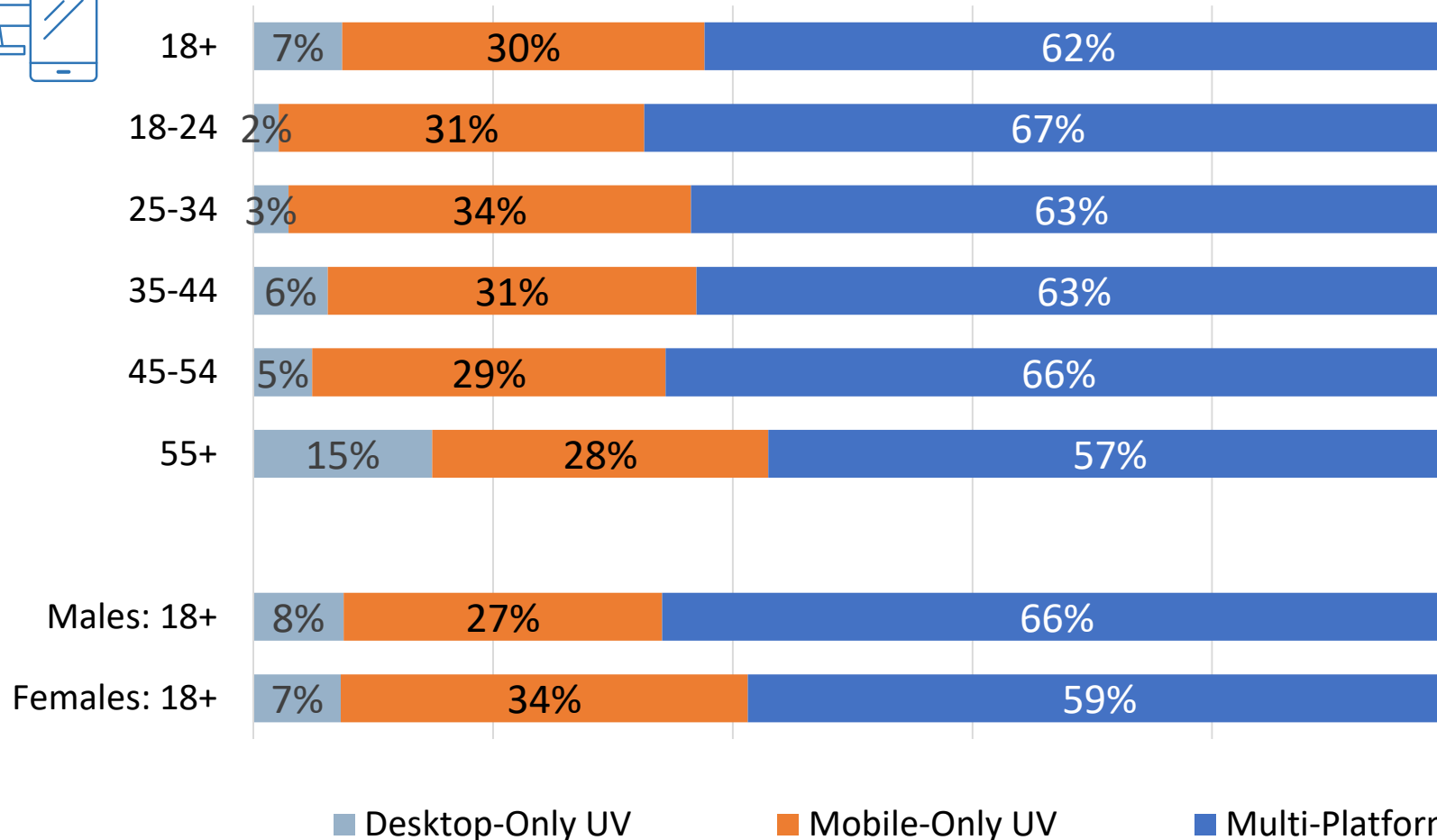
13.1 m adults are now mobile only

Multi-Platform usage by age and gender

55+ are least likely to be Multi-Platform



Unique Viewers by Platform by Age & Gender



55+ are more likely to be 'Desktop Only'

Females are more likely to be 'Mobile Only'

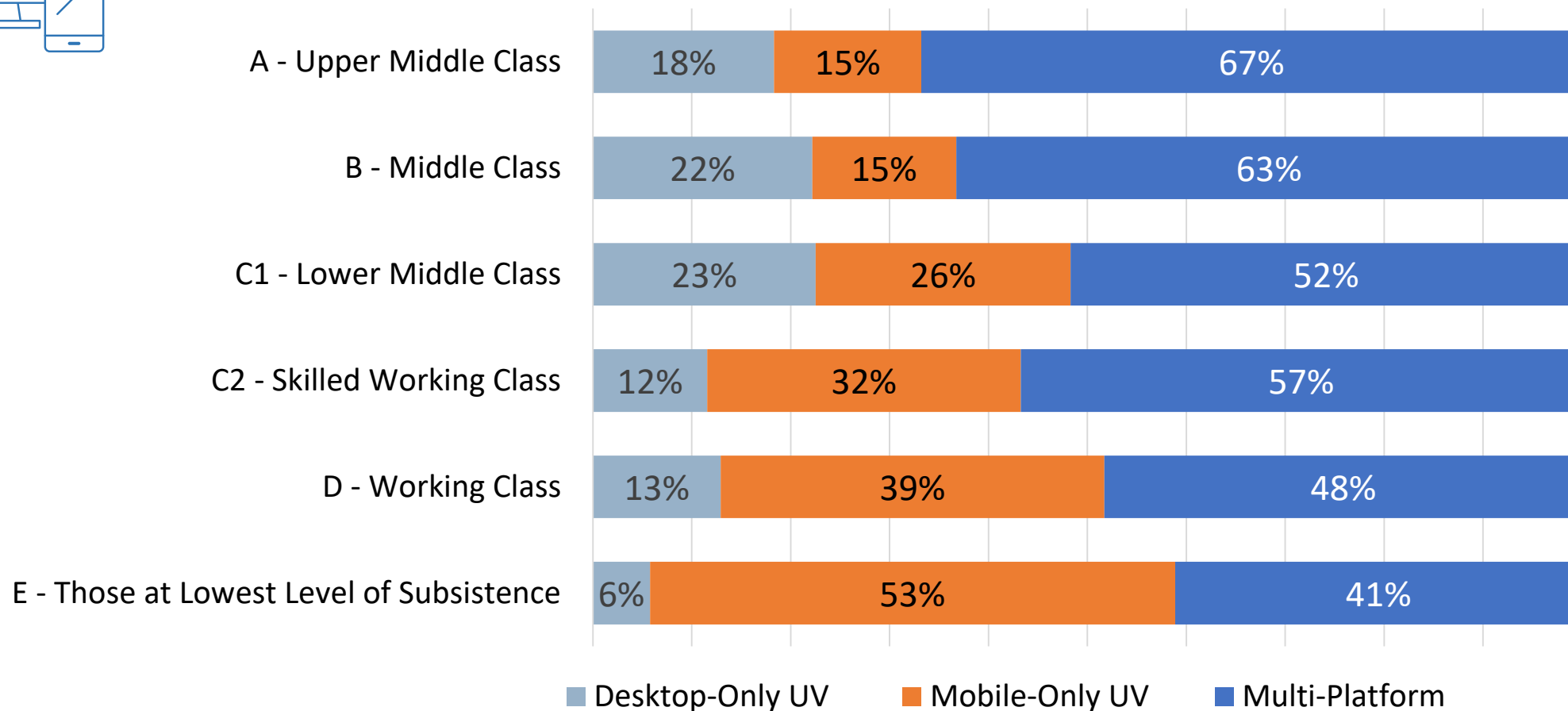
■ Desktop-Only UV
 ■ Mobile-Only UV
 ■ Multi-Platform

Multi-Platform usage by social grade

Lower social grades are least likely to be multi-platform



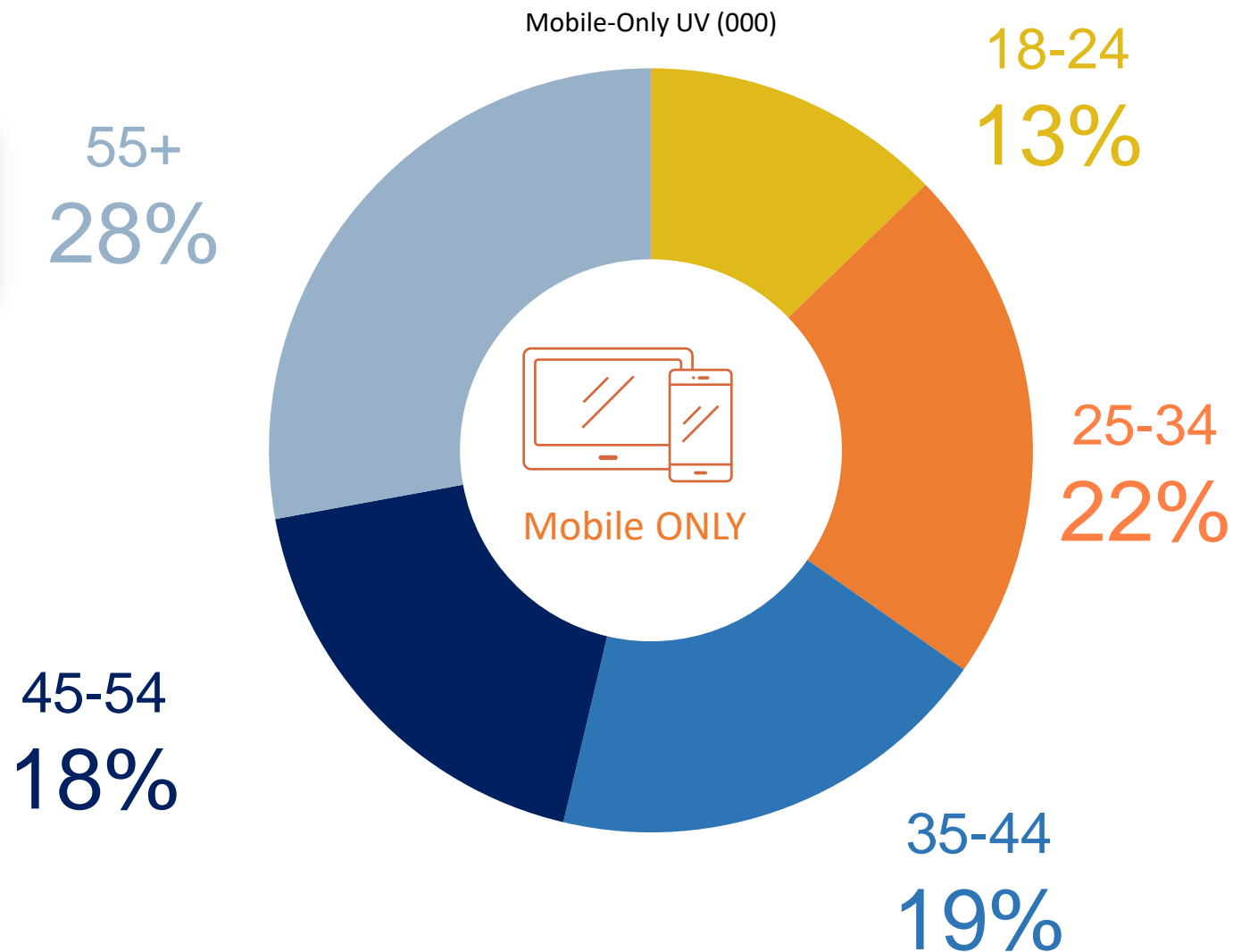
Unique Viewers by Platform by Age & Gender



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

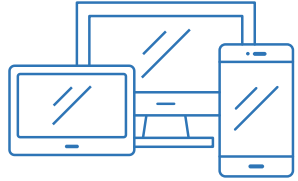




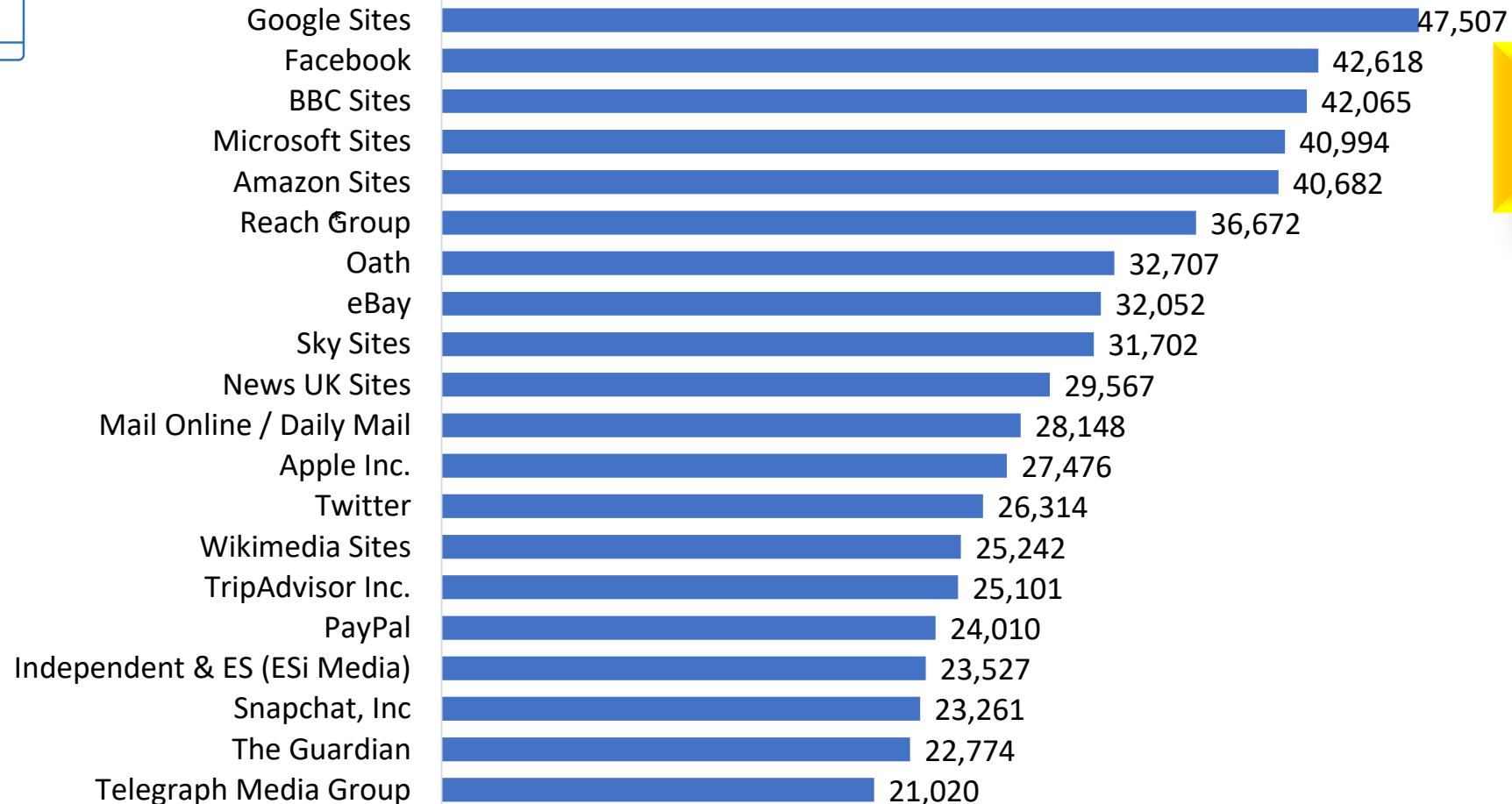
Top Properties: Total Digital Population

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

Google reaches 97% of the UK Online population



Total Unique Visitors/Viewers (000s) = 48,988



The top 5 properties all have online reach over 80%

The Ozone Project – How might it compare to Google and Facebook?

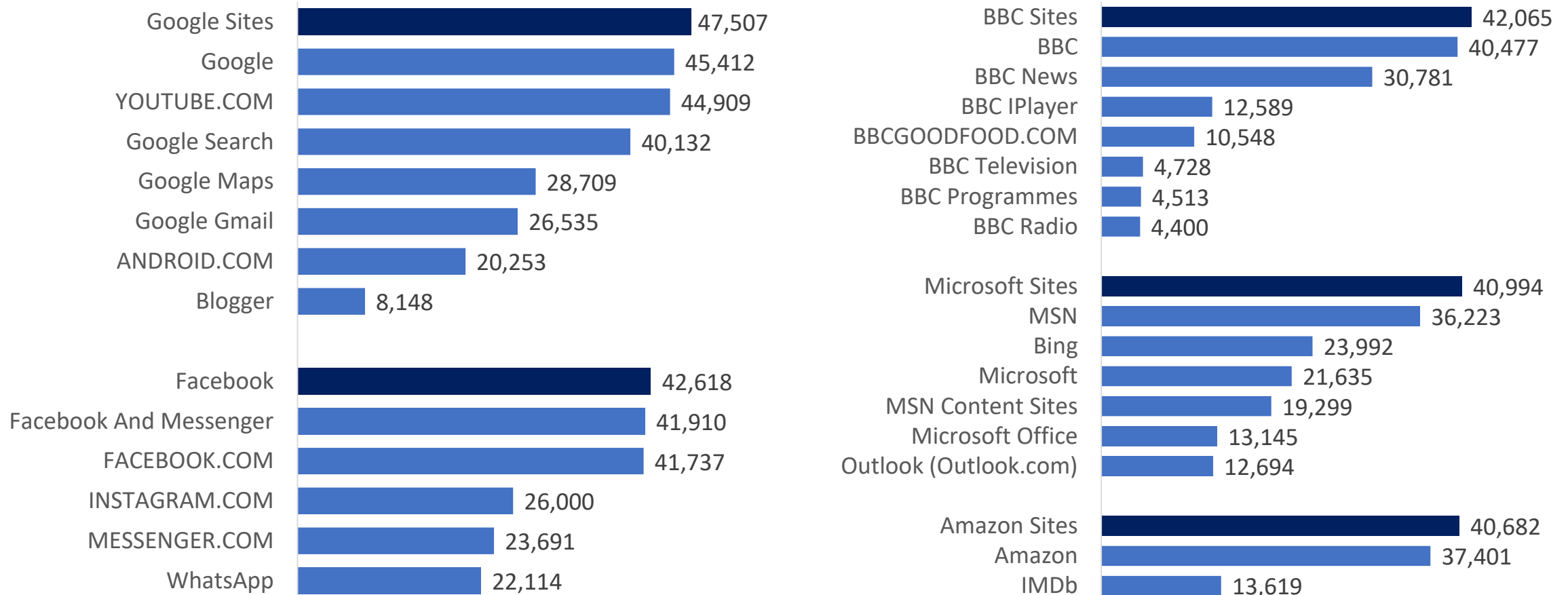
Media	Total Digital Population	
	Total Unique Visitors (000)	% Reach
Google Sites	47,507	97.0
Facebook	42,618	87.0
Unduplicated (<i>The Ozone Project</i>*)	42,493	86.7
• Reach Group	36,672	74.9
• News UK Sites	29,567	60.4
• The Guardian	22,774	46.5
• Telegraph Media Group	21,020	42.9

Source: Comscore MMX Multi-Platform, Sept 2018, Desktop age 6+, Mobile age 18+
 MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
 This data is an estimate for The Ozone Project based on running an 'Audience Deduplication' report for The Reach Group, News UK Sites, The Guardian and Telegraph Media properties. Actual data for the brand may differ once The Ozone Project is defined and included in the interface

Audience Breakdown of Top 5 Sites

YouTube alone reaches more than all Facebook properties combined

Total Unique Visitors (000)

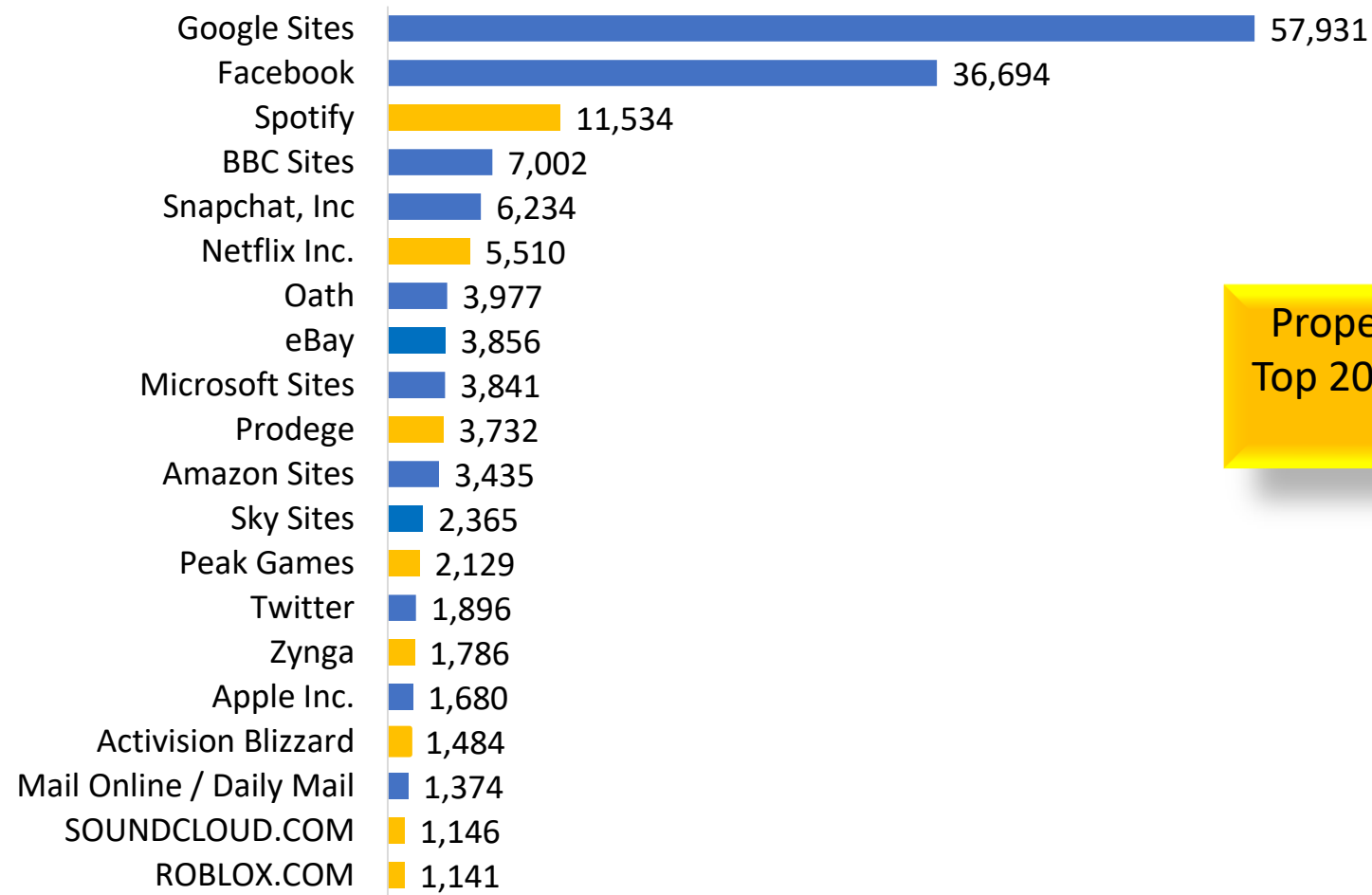


Top 20 Properties by 'Time Spent*' – Total Digital Population

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



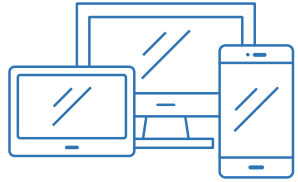
Total Mins (MM) – Total Market = 259,250



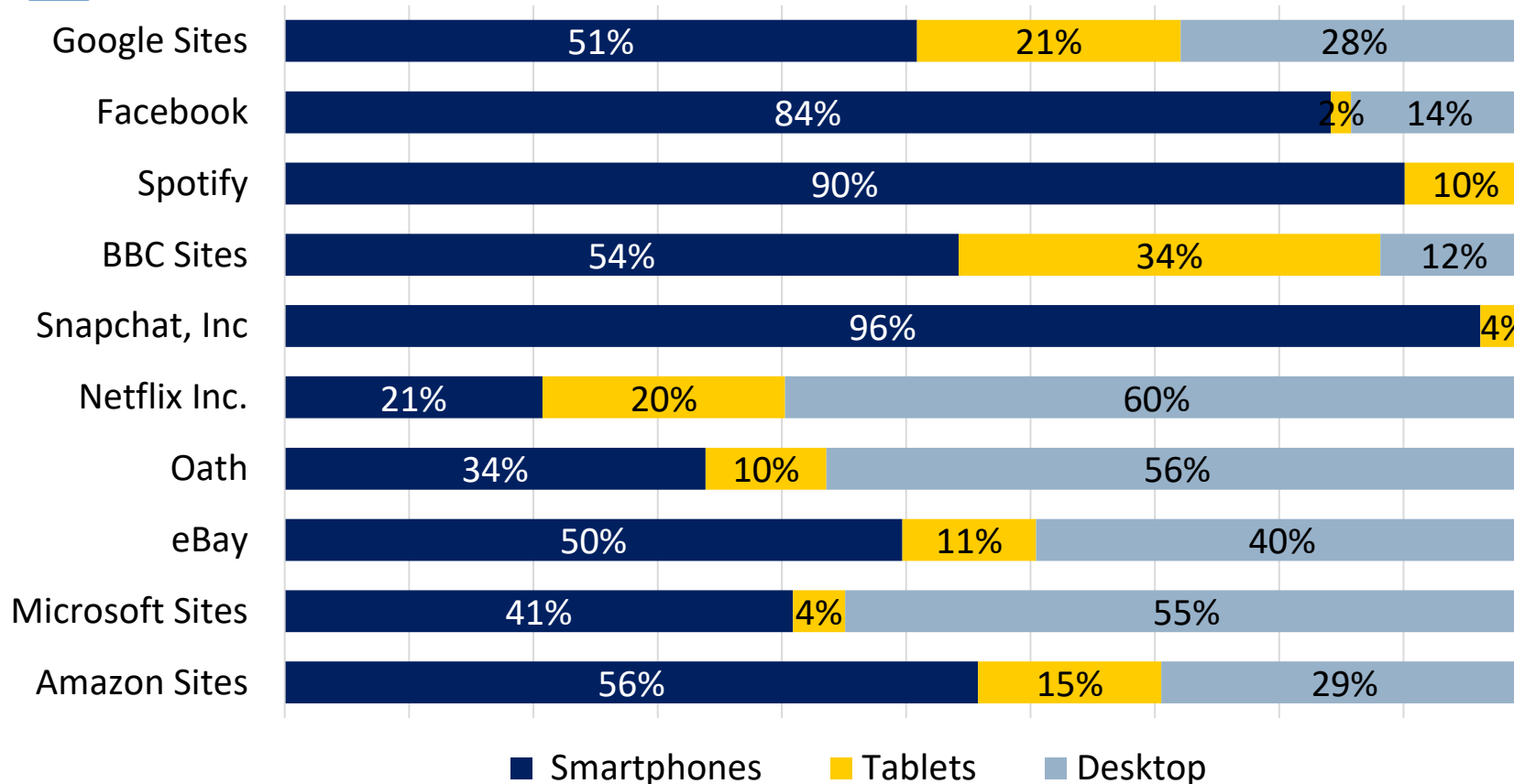
Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

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, Google & Netflix have highest Tablet share out of top 10

Majority of time spent online for Microsoft & Oath is on the desktop



Mobile usage

Mobile Reach by Platform & Access

86% of the UK online adult population use mobile apps

Reach of Online UK Population - Sept 2018, 18+



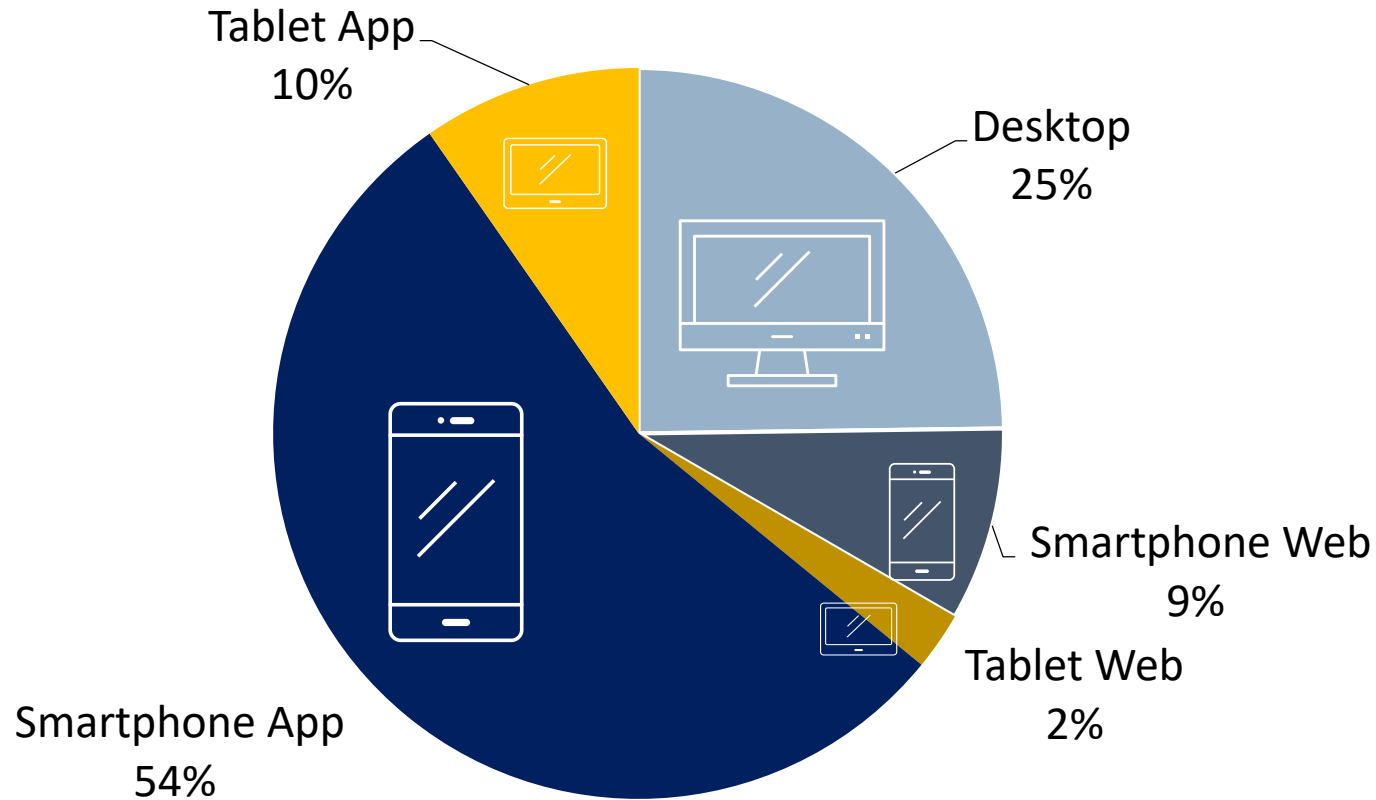
Source: Comscore MMX Multi-Platform, Sept 2018, UK, Adults 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

*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 64% of all Minutes

Share of Total Minutes



Mobile Apps account for **64%** of ALL minutes & **85%** of MOBILE minutes

Source: Comscore MMX Multi-Platform, Sept 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



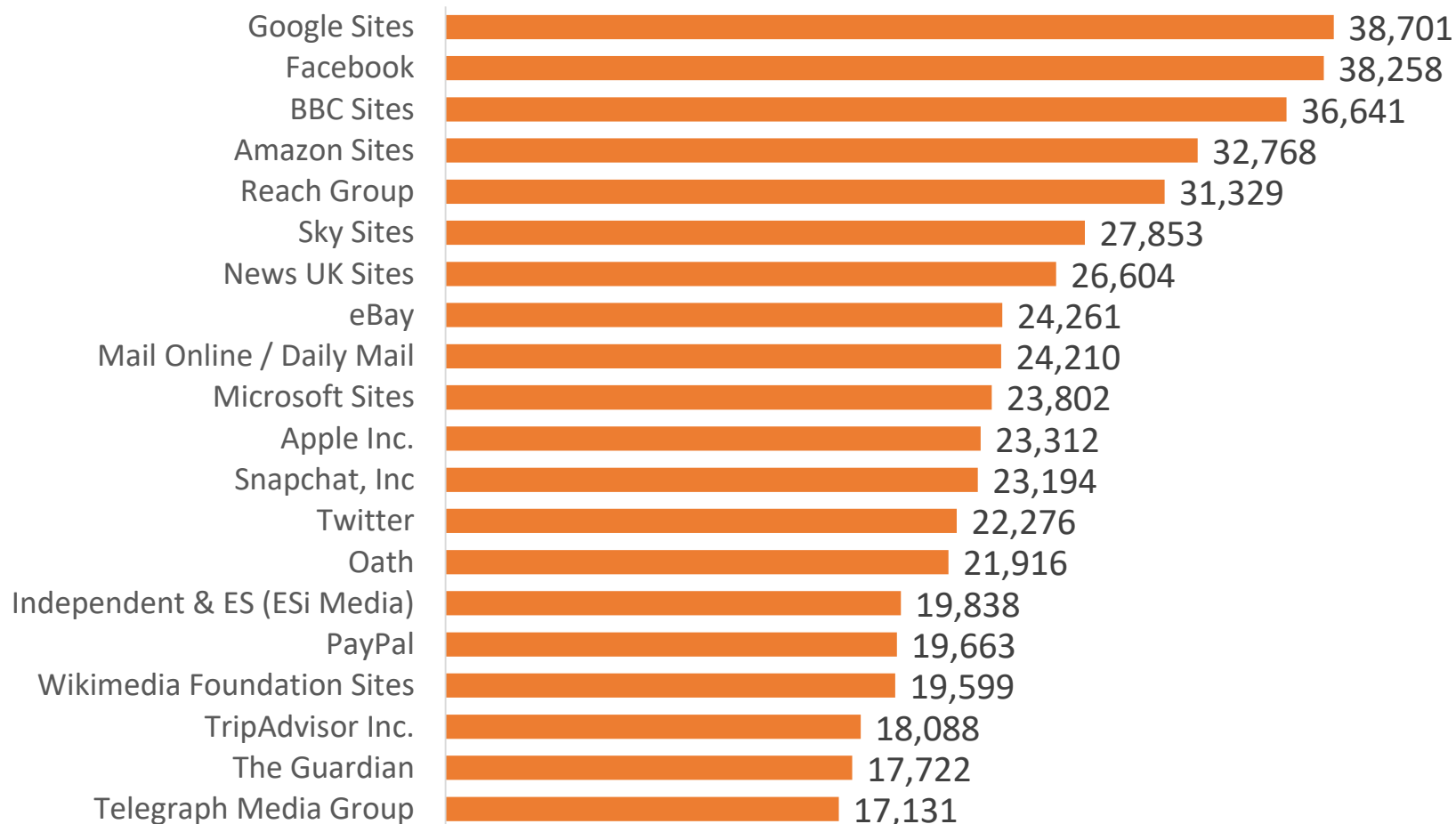
Top Properties: Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

40m adults accessed mobile content in Sept 2018 (via browser and app)



Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 40,268

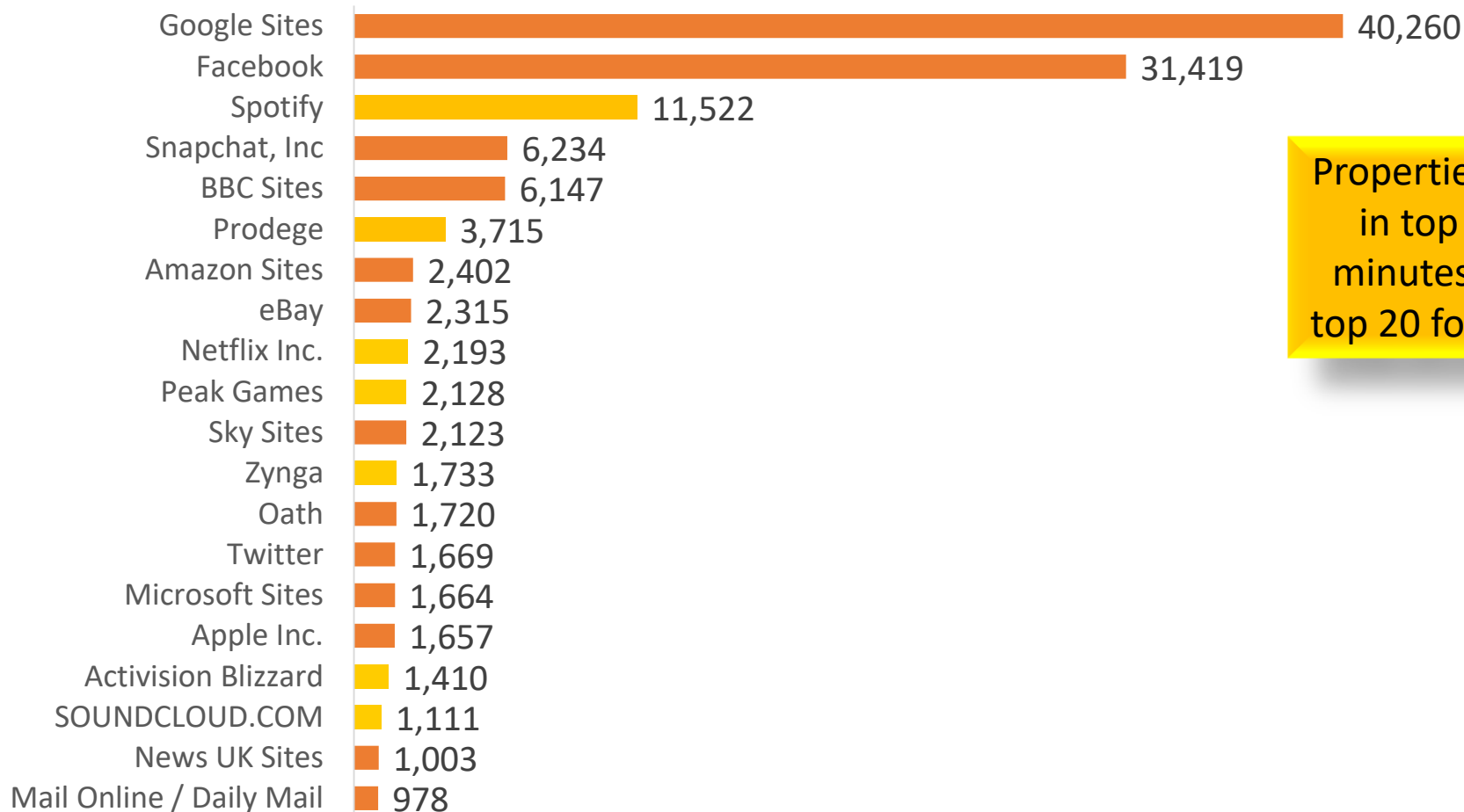


Top 20 Mobile Properties ranked by minutes

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



Total Minutes (MM) Total Mobile (18+) = 192,287



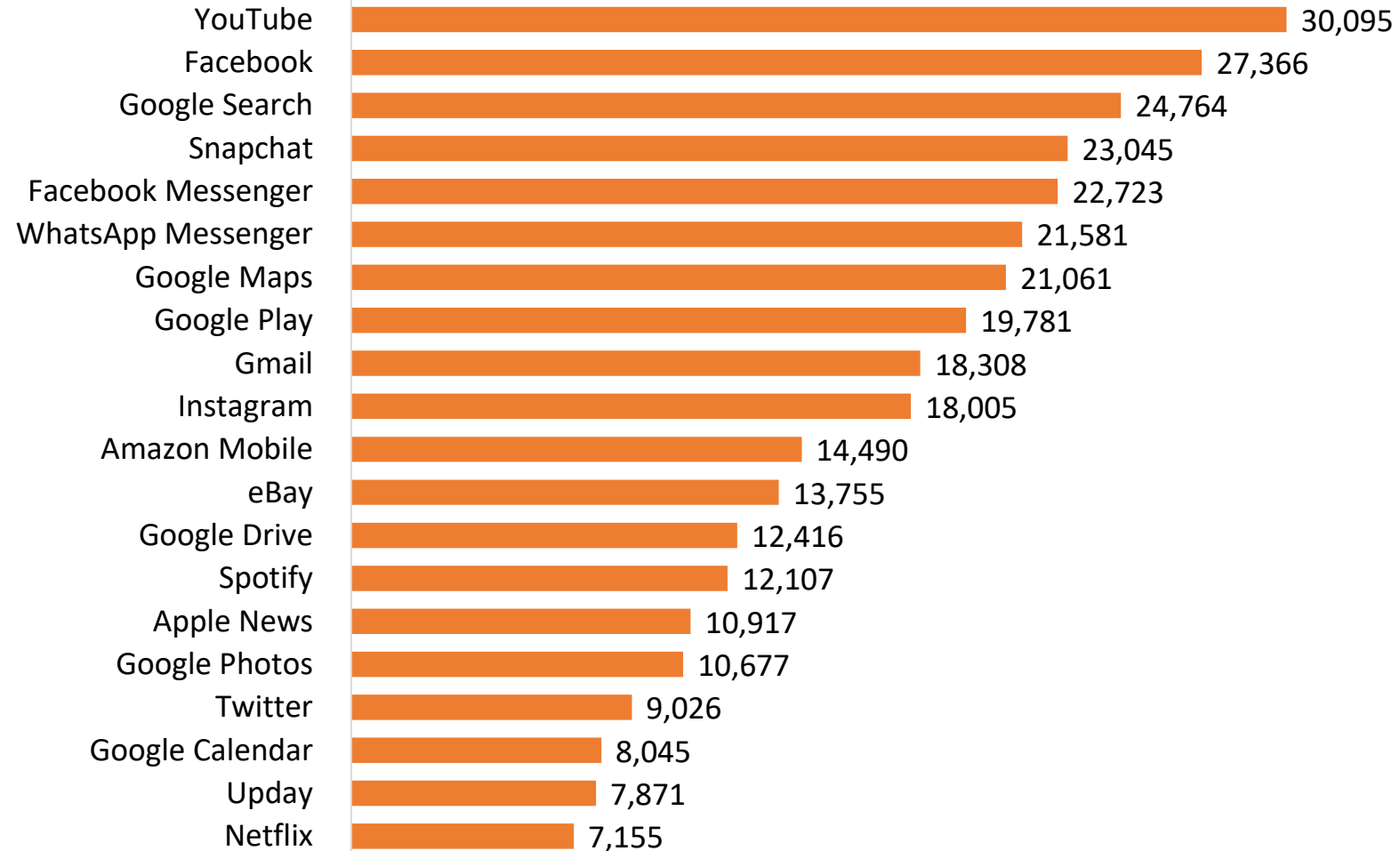
Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

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

Global Brands dominate top 20 Apps

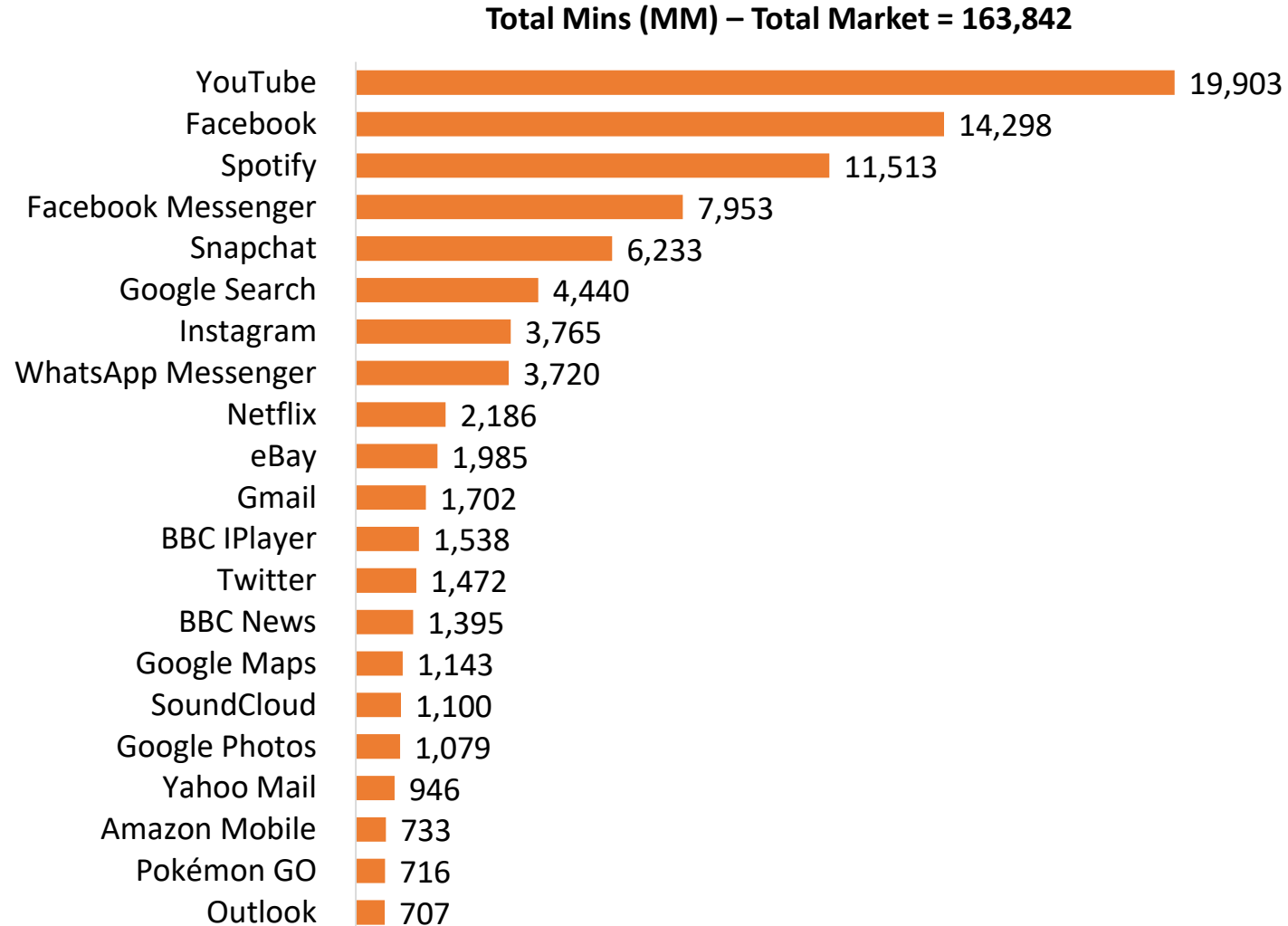


Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 37.3m



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

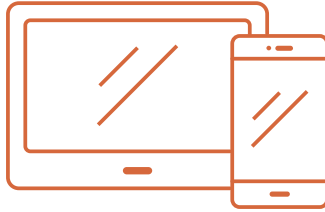
Spotify & Netflix are in the top 10 for minutes spent on apps



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



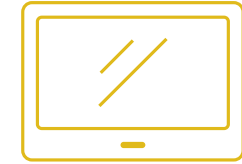
	(Million)
YouTube	30.1
Facebook	27.4
Google Search	24.8
Snapchat	23.0
Facebook Messenger	22.7
WhatsApp Messenger	21.6
Google Maps	21.1
Google Play	19.8
Gmail	18.3
Instagram	18.0

Smartphone Top 10



	(Million)
• YouTube	25.8
• Facebook	24.5
• Google Search	22.5
• WhatsApp Messenger	21.4
• Facebook Messenger	21.4
• Google Play	19.8
• Google Maps	19.8
• Gmail	17.1
• Snapchat	17.1
• Instagram	15.9

Tablet Top 10

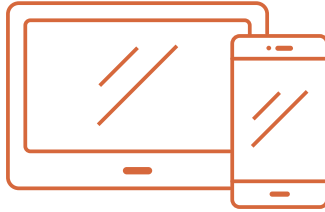


	(Million)
• Snapchat	7.8
• YouTube	6.2
• Facebook	4.1
• BBC IPlayer	3.3
• Google Search	3.2
• Instagram	2.8
• Netflix	2.4
• Apple News	2.1
• Facebook Messenger	1.9
• BBC Weather	1.9

Top 10 Mobile Apps by Minutes by Mobile Platform

Spotify, BBC, ITV & Netflix enter the top 10 for Minutes

Total Mobile Top 10



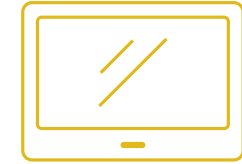
	(Million)
YouTube	19.9
Facebook	14.3
Spotify	11.5
Facebook Messenger	8.0
Snapchat	6.2
Google Search	4.4
Instagram	3.8
WhatsApp Messenger	3.7
Netflix	2.2
eBay	2.0

Smartphone Top 10



	(Million)
• Facebook	14.0
• YouTube	12.6
• Spotify	10.4
• Facebook Messenger	7.9
• Snapchat	6.0
• Instagram	3.7
• WhatsApp Messenger	3.7
• Google Search	3.2
• eBay	1.7
• Gmail	1.4

Tablet Top 10



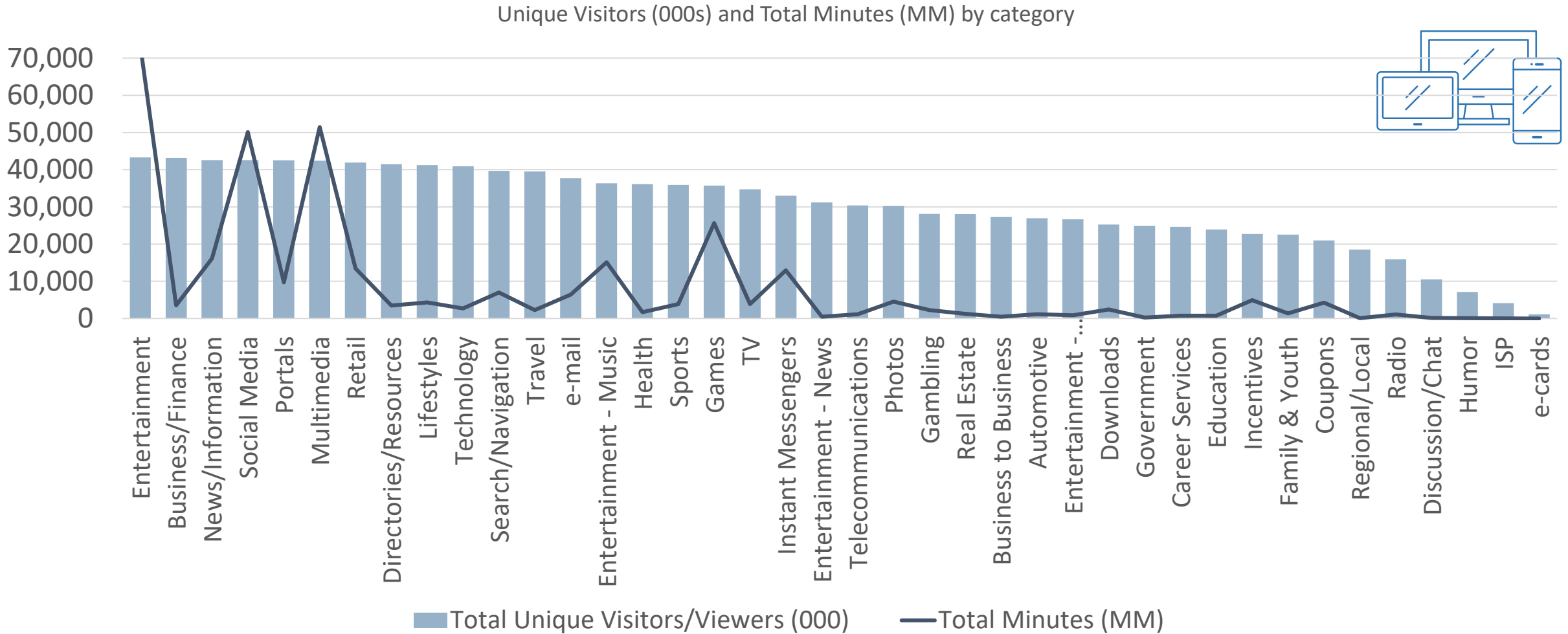
	(Million)
• YouTube	7.3
• Google Search	1.3
• Spotify	1.1
• Netflix	1.1
• BBC IPlayer	1.0
• YouTube Kids	0.4
• ITV Hub	0.4
• BBC News	0.3
• Facebook	0.3
• eBay	0.3



Categories

Major Categories Online – Unique Visitors v Minutes

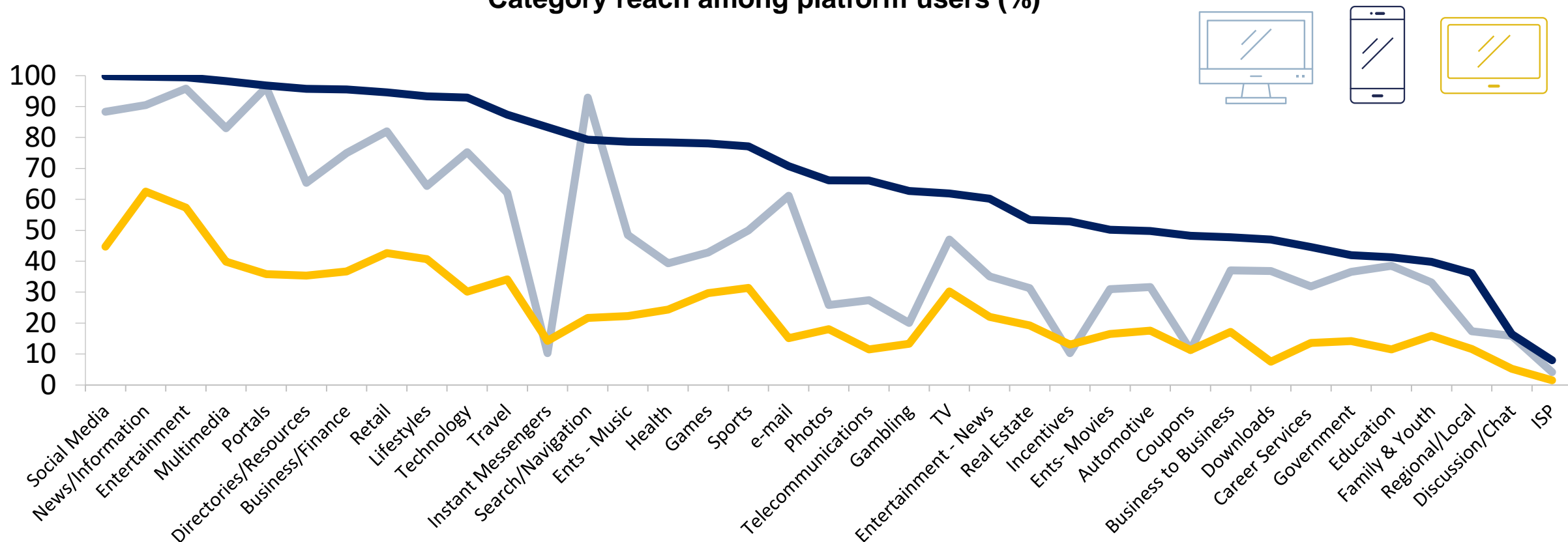
Entertainment, Social Media, IM & Games have high engagement



Category Reach by Platform

Reach is higher on smartphones for nearly all activities

Category reach among platform users (%)



Source: Comscore MMX Multi-Platform, Sept 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

25%

Education	79%
Auctions	77%
Car Rental	72%
Entertainment - Movies	71%
Government	68%
Computer Hardware	66%
Computer Software	63%
Discussion/Chat	62%
Business to Business	61%
Autos Manufacturer	61%
Blogs	61%
Politics	61%
Home Furnishings	60%
ISP	60%
Airlines	60%



Smartphone total

63%

• Instant Messenger	98%
• Gay/Lesbian	94%
• Coupons	93%
• Photos	93%
• Incentives	91%
• Books	91%
• Job Search	91%
• Maps	89%
• Consumer Electronics	87%
• Personals	86%
• Health	86%
• Entertainment - Music	85%
• Retail - Music	84%
• Social Media	84%
• Religion/Spirituality	79%



Tablet total

12%

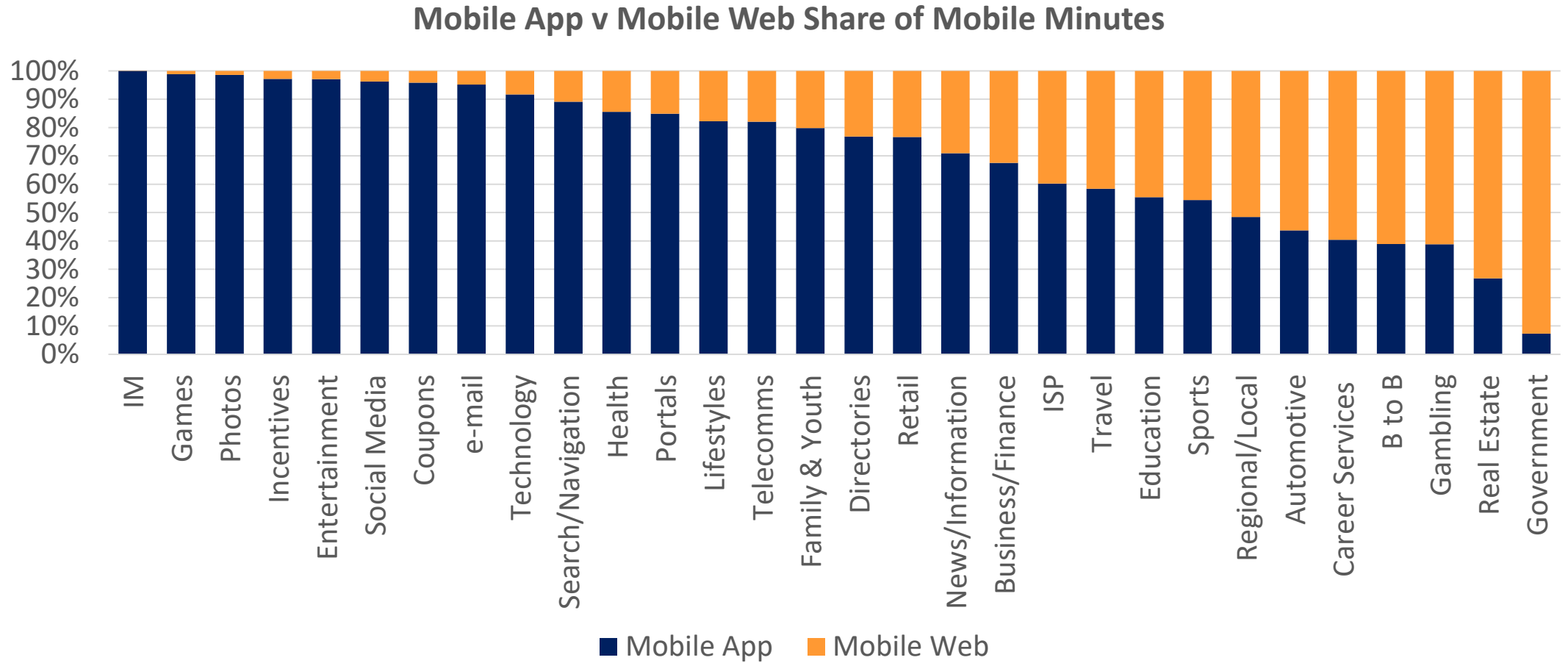
TV	45%
Radio	33%
General News	29%
Home	22%
News/Information	22%
Kids	20%
Search/Navigation	19%
Newspapers	18%
Multimedia	18%
Online Gaming	18%
Entertainment	18%
Games	17%
Family & Youth	16%
Real Estate	16%
Travel - Information	15%

Source: Comscore MMX Multi-Platform, Sept 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

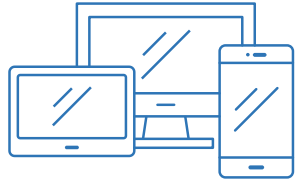
Mobile App share of minutes varies by content & service



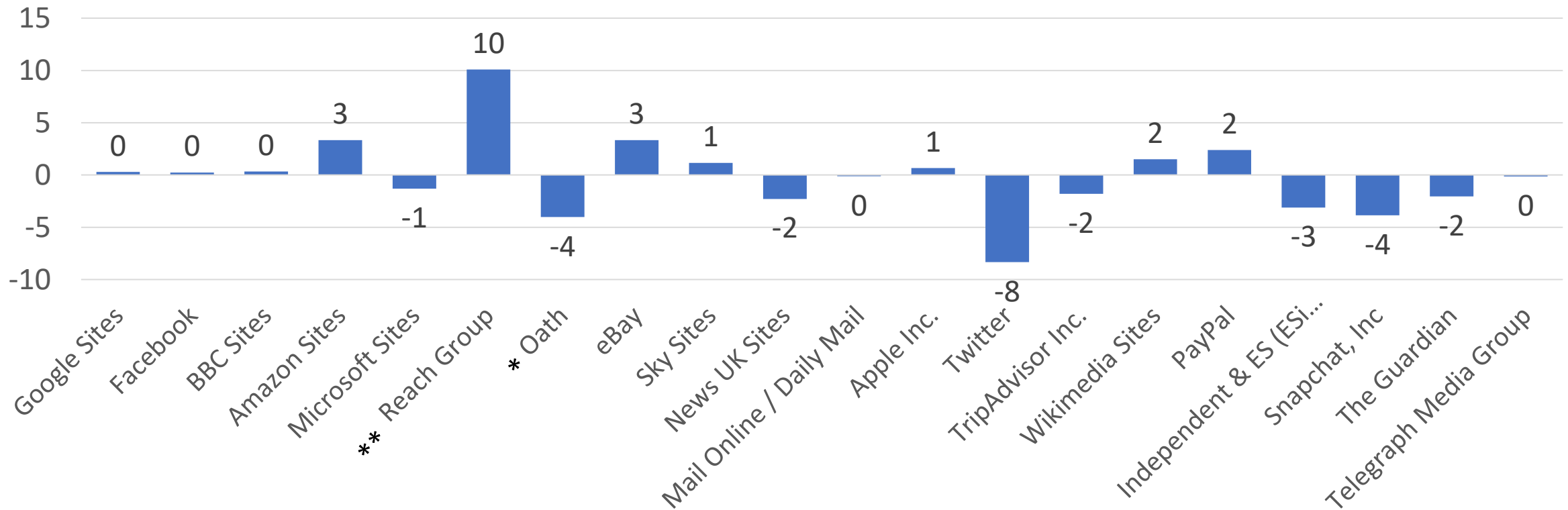


Key Changes: Sep 18 v Jun 18

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



Unique Visitor Change: June to Sept 2018



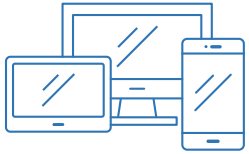
Source: Comscore MMX Multi-Platform, Sep 2018, Adults 18+

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

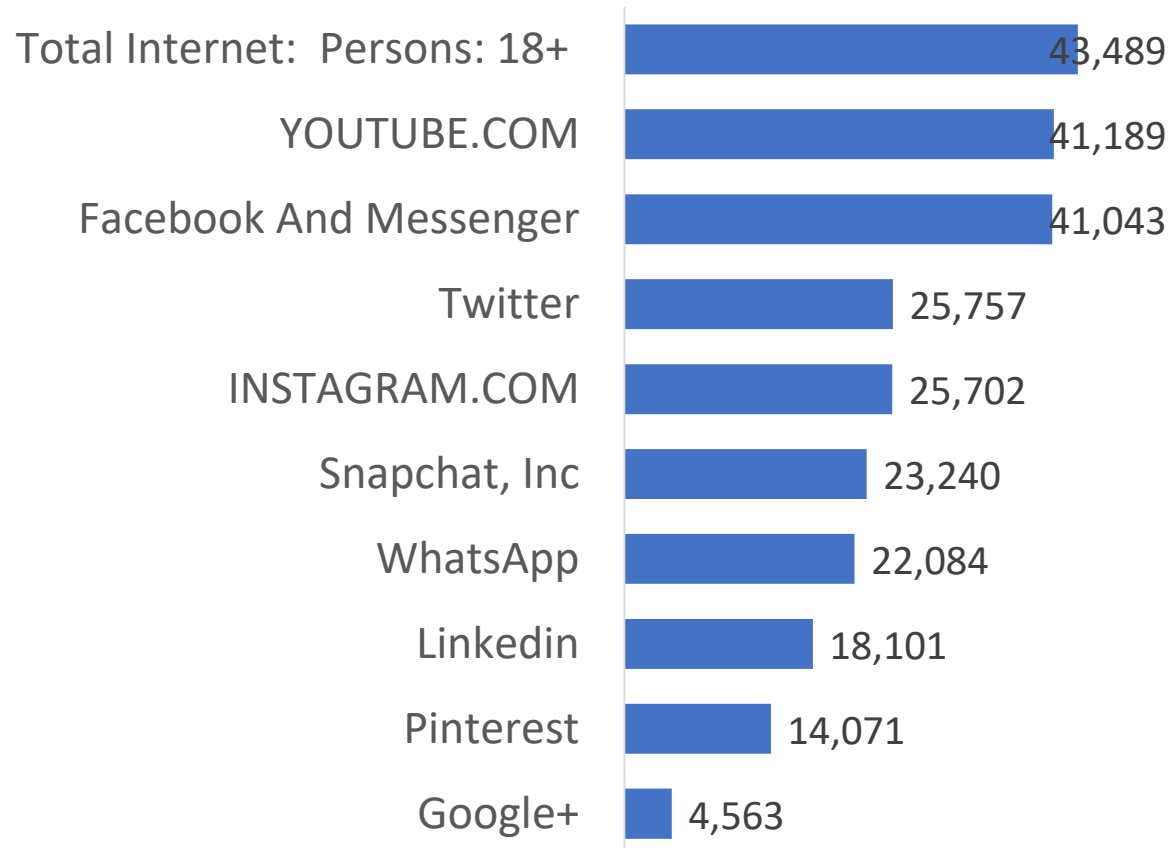
*Oath June 2018 was under-reported due to a tagging issue. ** Reach audience increase is driven by the inclusion of former Northern & Shell entities e.g. Express, Daily Star and OK

Change in Audience for Social Media Brands

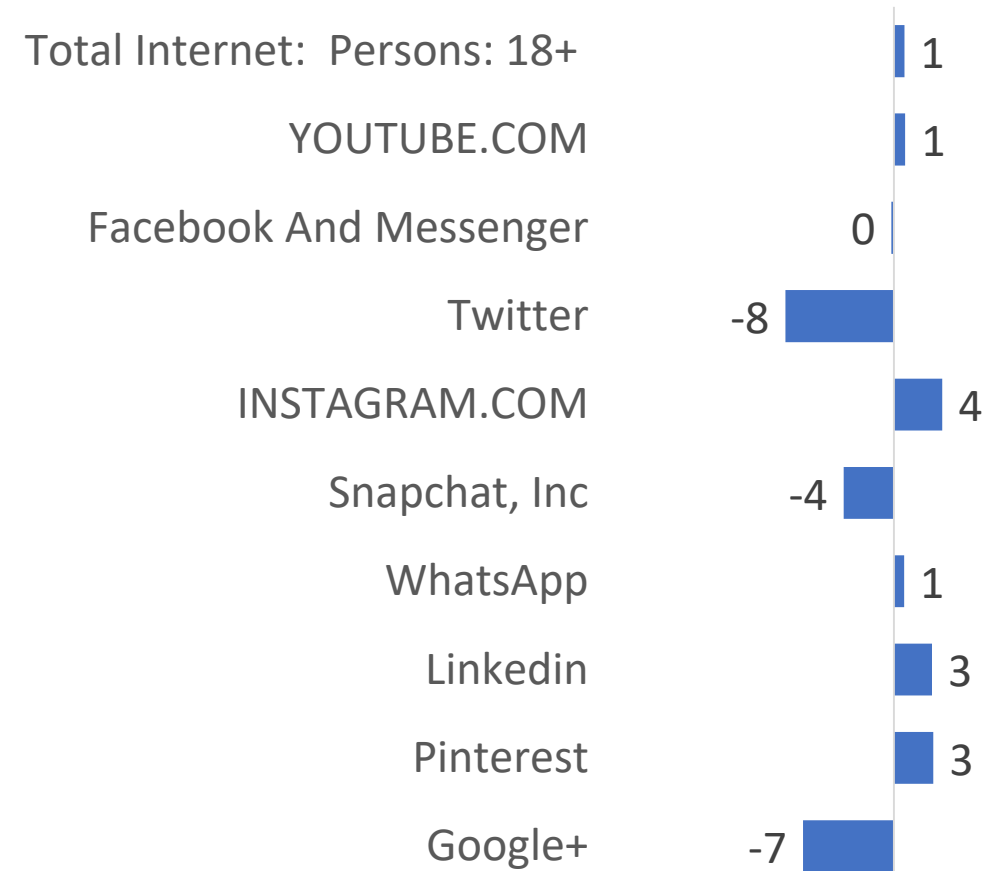
Instagram, LinkedIn & Pinterest had biggest gains



Unique Visitors 18+ (000s) – Sept 2018



Unique Visitors 18+ % Change Sep 18 v June 18



Source: Comscore MMX Multi-Platform, Sept 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.

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

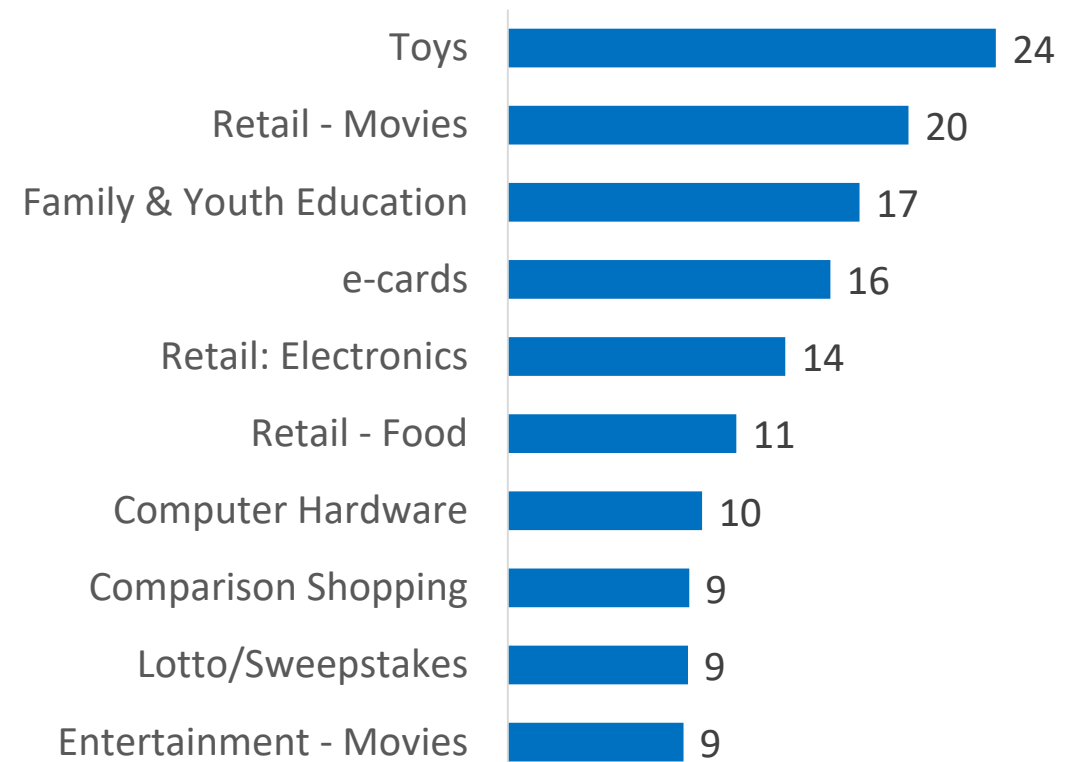


Category Growth – Jun 18 v Mar 18

Unique Visitor Increase (000s): Sep 18 v Jun 18



Unique Visitor % Increase: Sept 18 v Jun 18



Source: Comscore MMX Multi-Platform, Sep 2018, UK, 18+

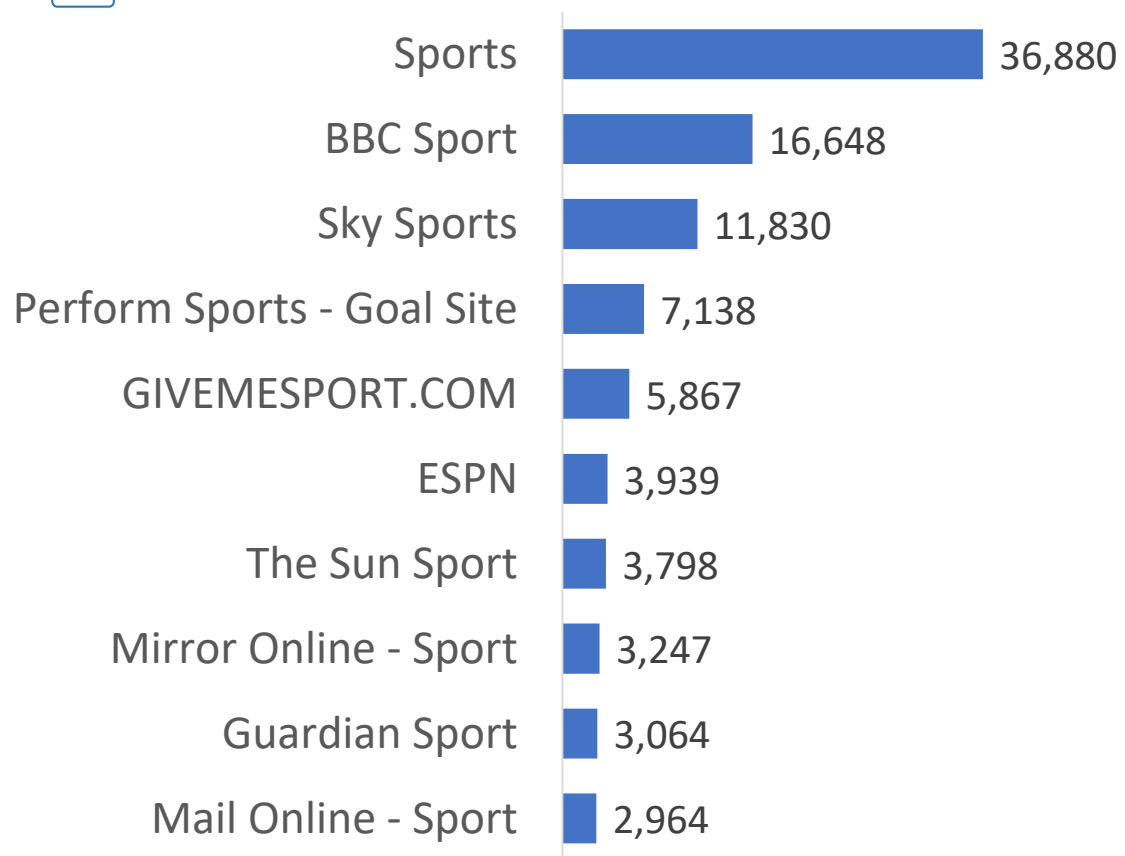
MMX Multi-Platform includes Desktop browsing, Desktop video streams, smartphone browsing & apps (on-network only for untagged apps), tablet browsing & apps for tagged sites & apps.

Change in Audience for Sports Brands

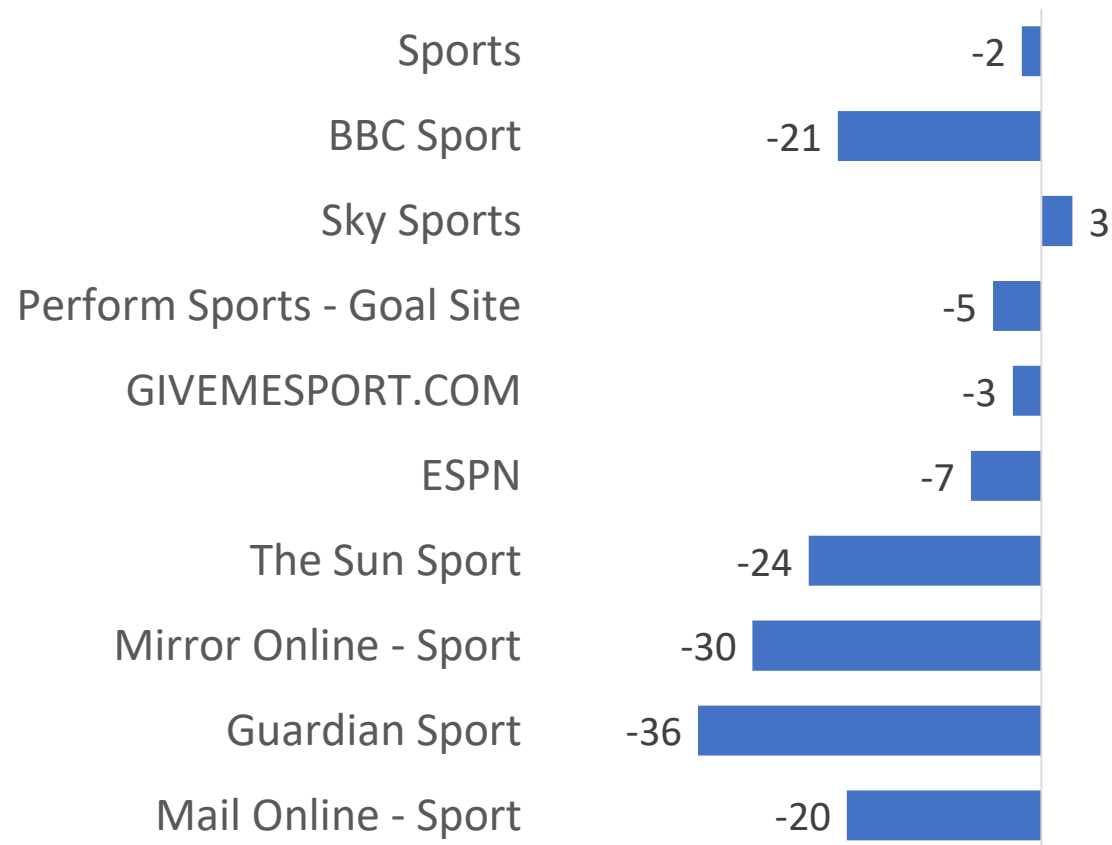
Sky Sports bucked the Audience trend between June and September



Unique Visitors 18+ (000s) – Sept 2018



Unique Visitors 18+ % Change Sep 18 v June 18



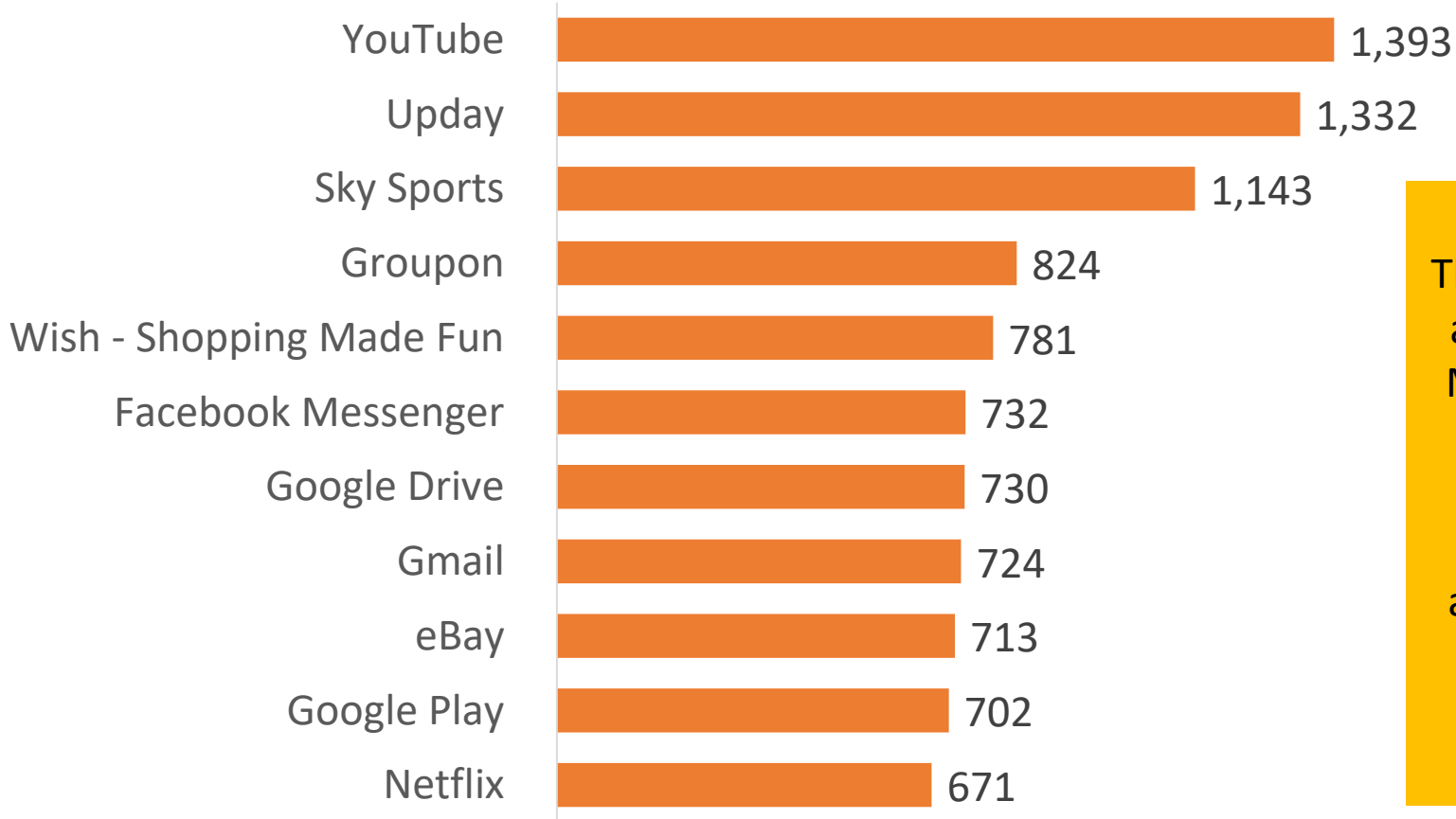
Source: Comscore MMX Multi-Platform, Sept 2018, UK, 18 +

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.

Top 100 Apps which had biggest Audience Gains: June to Sept 2018



Audience Gain (000s) – June to Sept 18



The new football season drove an increase in the Sky Sports Mobile App Audience of 49% compared to June.

Upday, the news aggregator app on Samsung phones and Groupon both witnessed audience increases of 20%.

Domestic Football drove up Audiences for Sky and BT Sport Apps



	Total Unique Visitors (000)		
	Jun-2018	Sep-2018	% Change
Sports	11,127	13,131	18
Sky Sports (Mobile App)	2,317	3,460	49
BBC Sport (Mobile App)	2,607	2,552	-2
Sky Sports Football Score Centre (Mobile App)	1,579	1,861	18
Soccer Saturday Super 6 (Mobile App)	815	1,108	36
BT Sport (Mobile App)	655	1,047	60
LiveScore (Mobile App)	638	677	6
Premier League - Official App (Mobile App)	164	621	278

Premier League Football drove increases to apps from Sky Sports and BT Sport after a quiet June and July when BBC Sport benefitted most from the World Cup and Wimbledon

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

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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/