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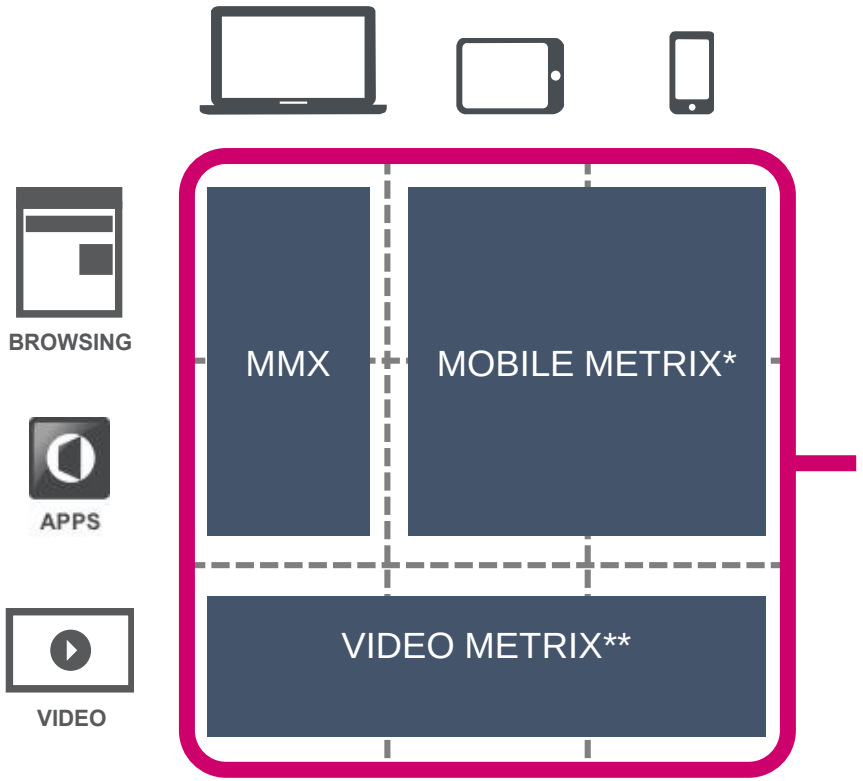
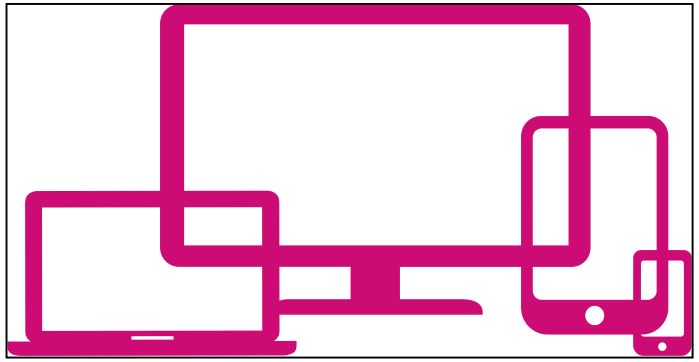
UK Digital Market Overview – June 2017

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®

*Please note that we use the term mobile to refer to smartphone and tablet usage combined

**Video not yet included for mobile and tablet

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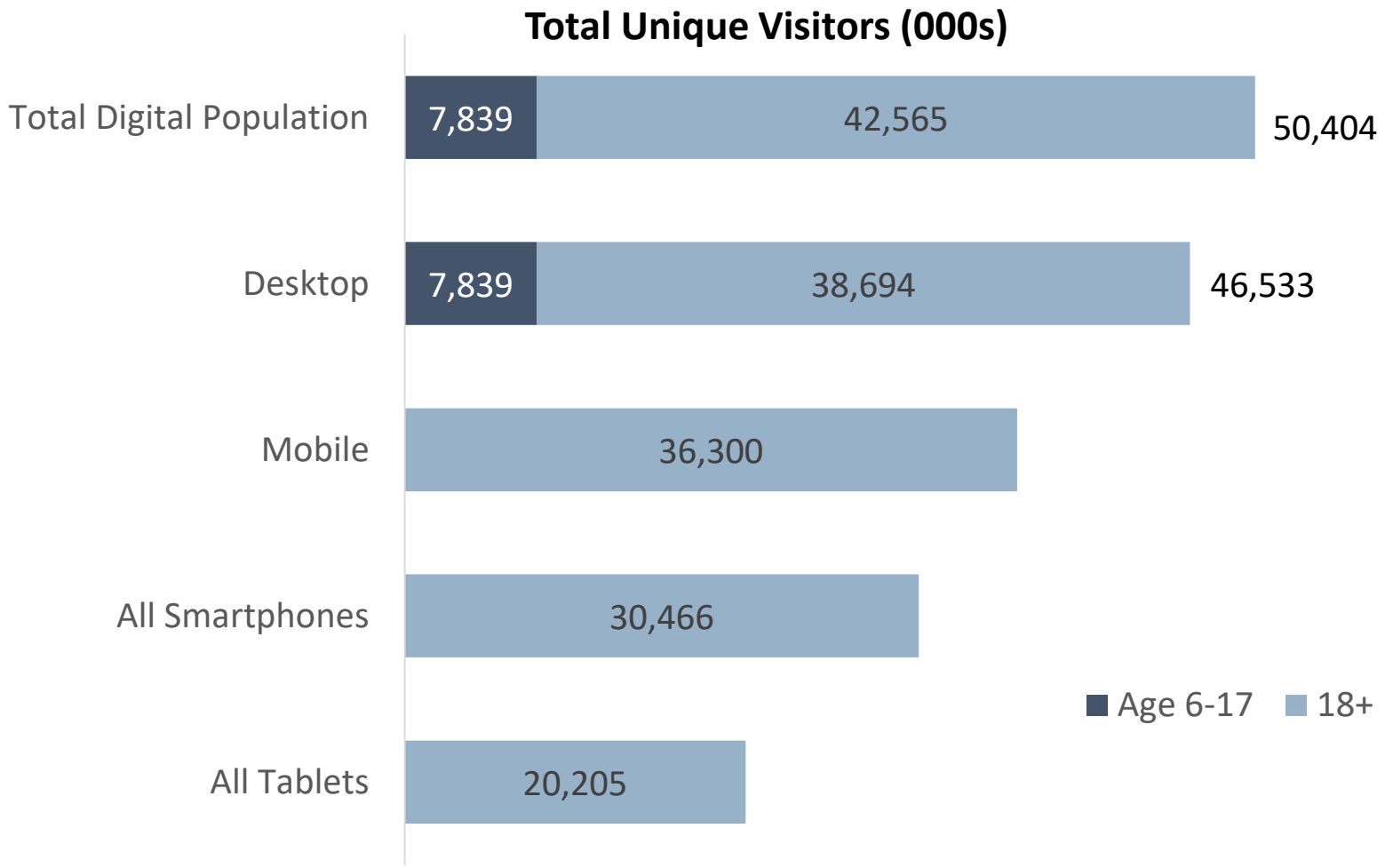
Multi-Platform Usage

Breakdown of Digital – Unique Visitors by Platform

Total Digital Population across desktop & mobile devices was 50.4m in June 2017



The desktop*still has the biggest audience despite mobile growth

Source: comScore MMX Multi-Platform, June 2017

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

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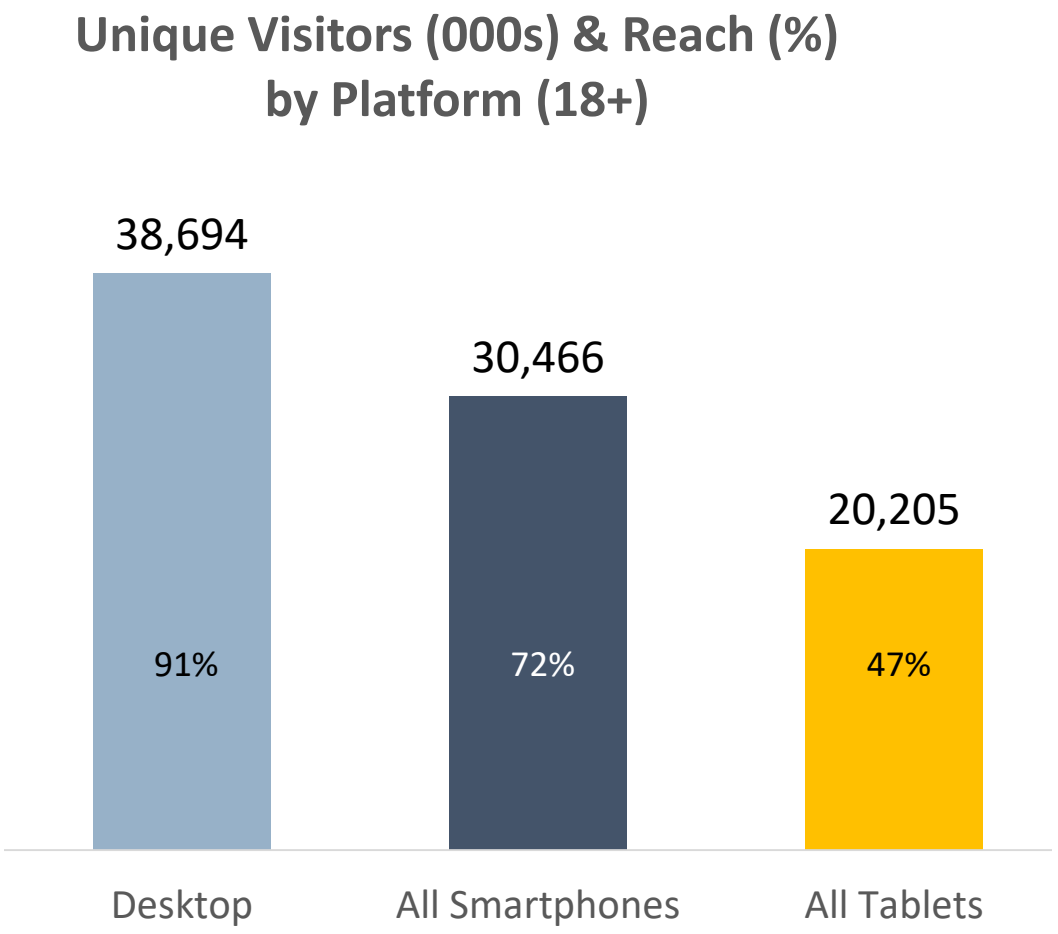
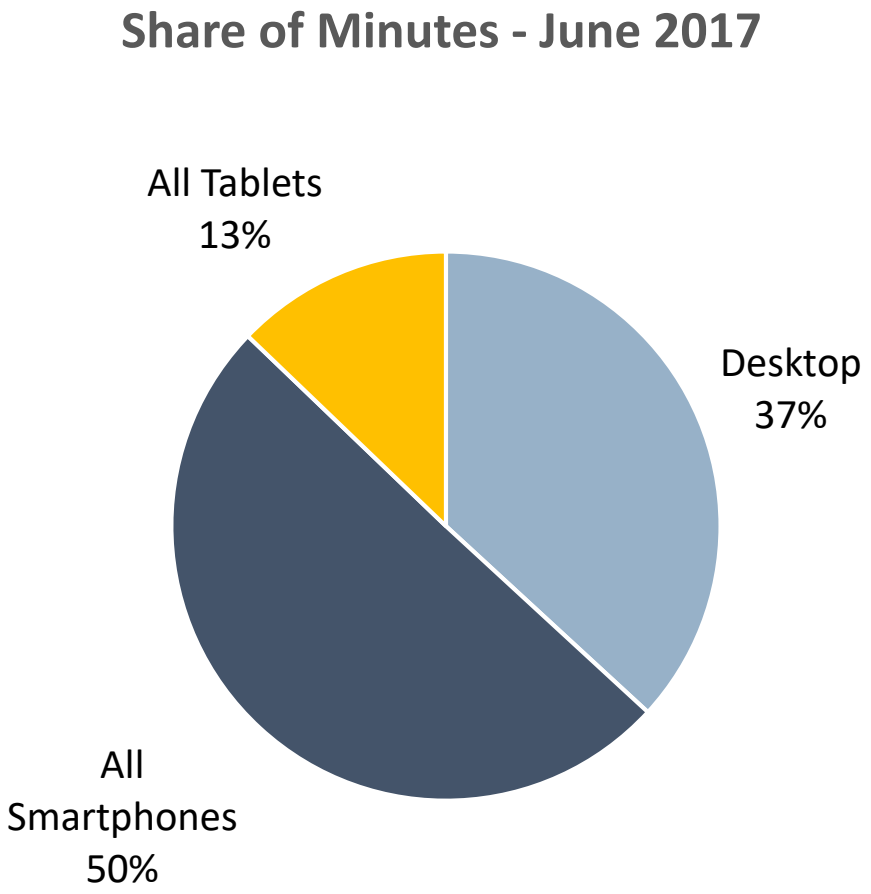
Unique Visitors and Share of Minutes by Platform

Although more adults use a PC, they spend more time on smartphones





comScore

Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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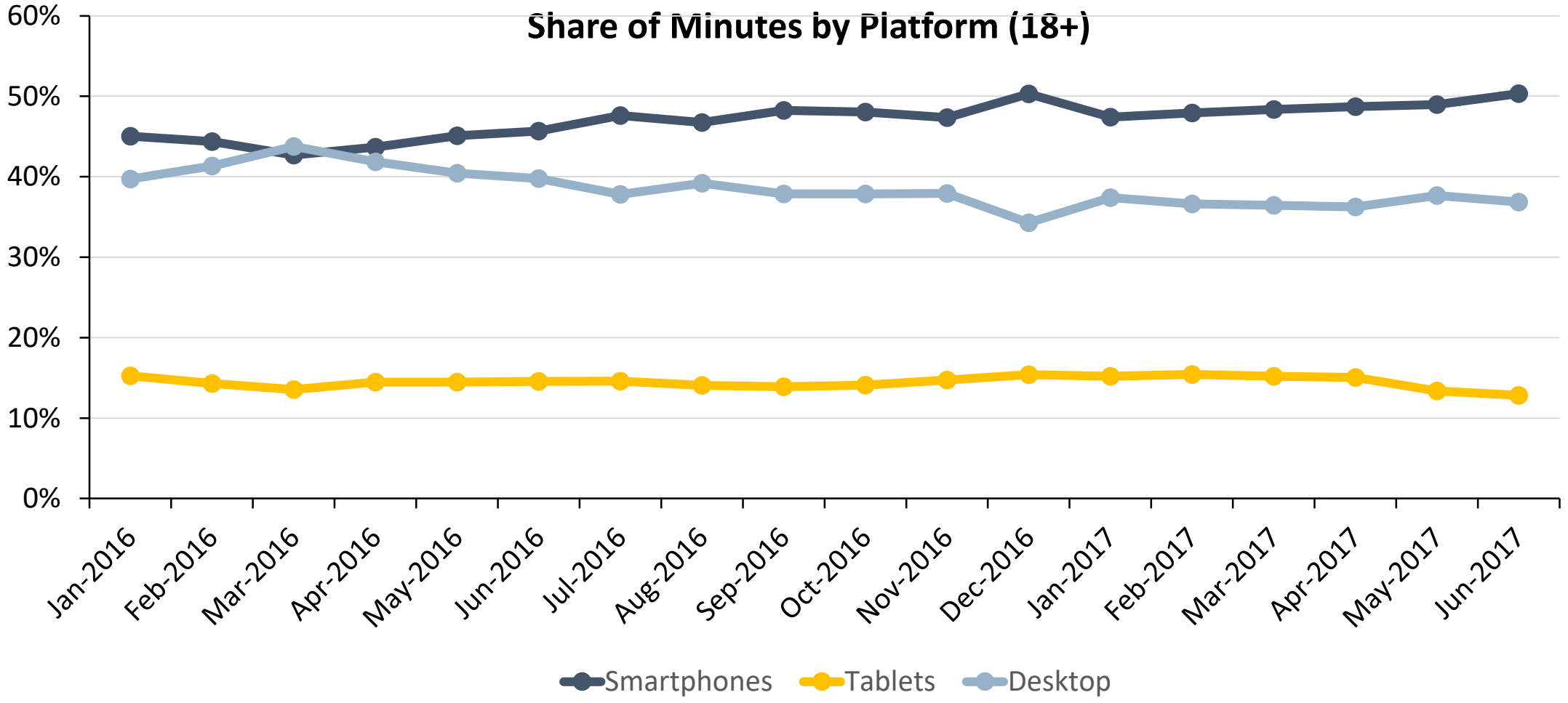
Change in Share of Minutes by Platform Jan 2016 to June 2017

Smartphones now account for 50% of all online minutes among adults



Source: comScore MMX Multi-Platform, Jan 2016 – June 2017, UK Adults 18+

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

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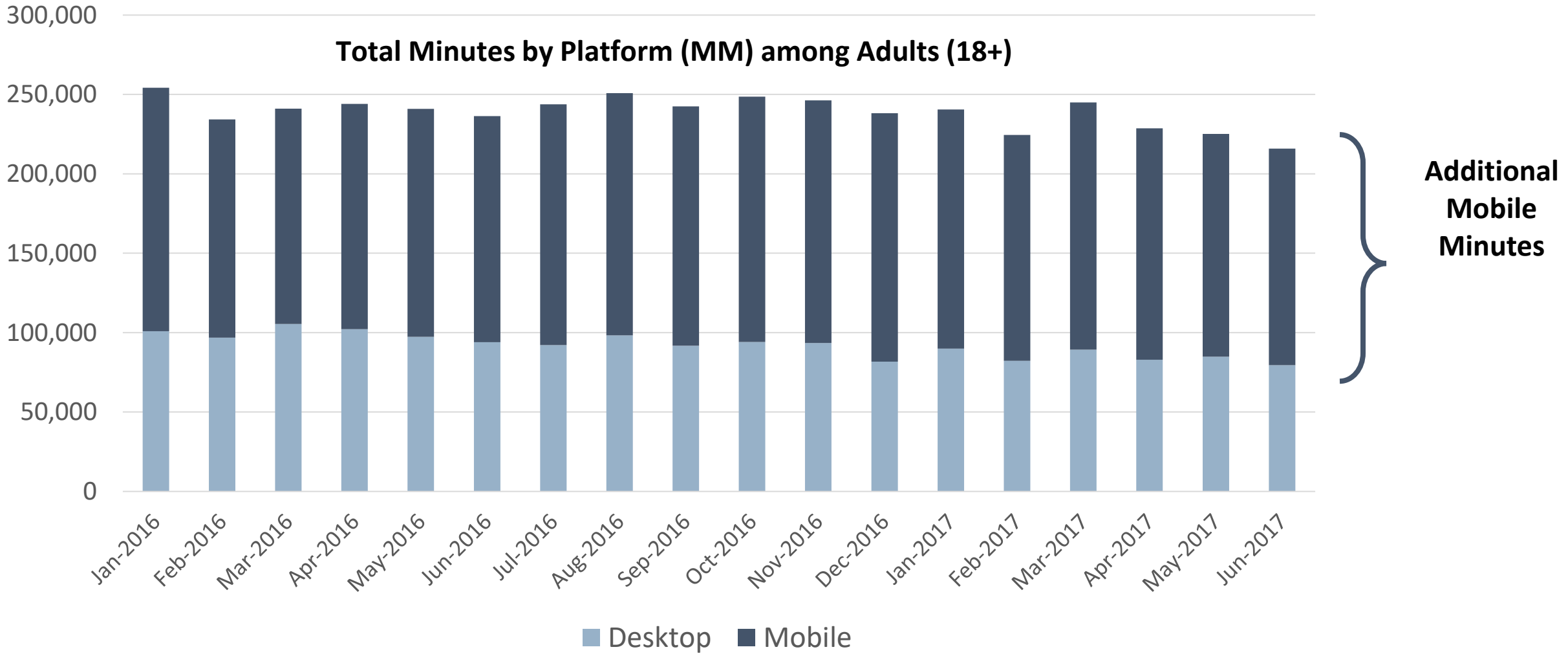
Desktop Minutes Among Adults since January 2016

Mobile has boosted digital minutes rather than replaced the desktop



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In May 2017, comScore and BBC made updates to the mobile SDK implementation within the BBC iOS app which primarily affect duration measurement

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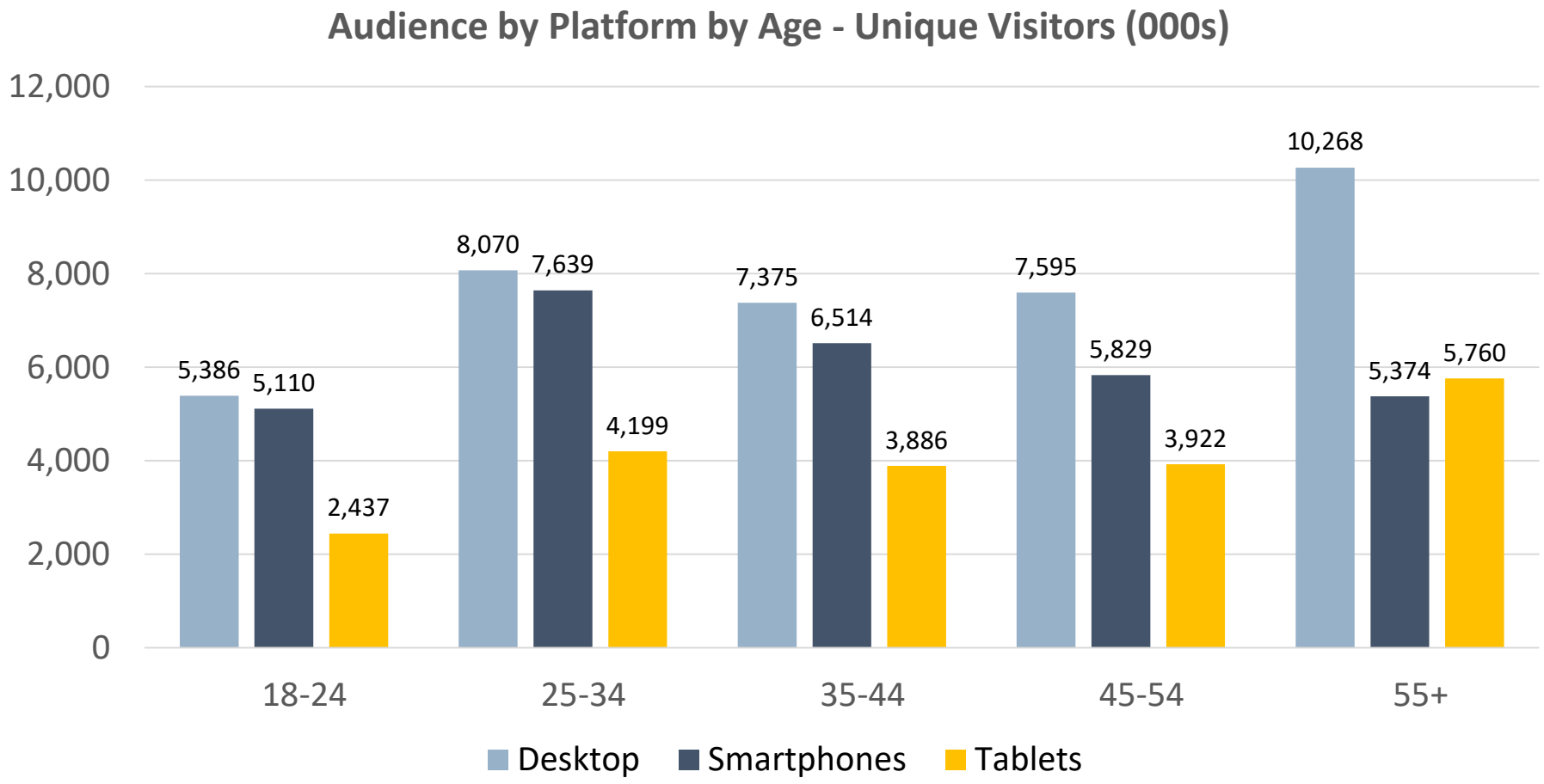
Platform Unique Visitors by Age

The desktop still has the biggest audience across all age groups



The desktop is still the device which has the biggest audience each month – across all age groups.

More 55+ use a tablet to access the internet than a smartphone

Source: comScore MMX Multi-Platform, Jan 2016 – June 2017, UK Adults 18+

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

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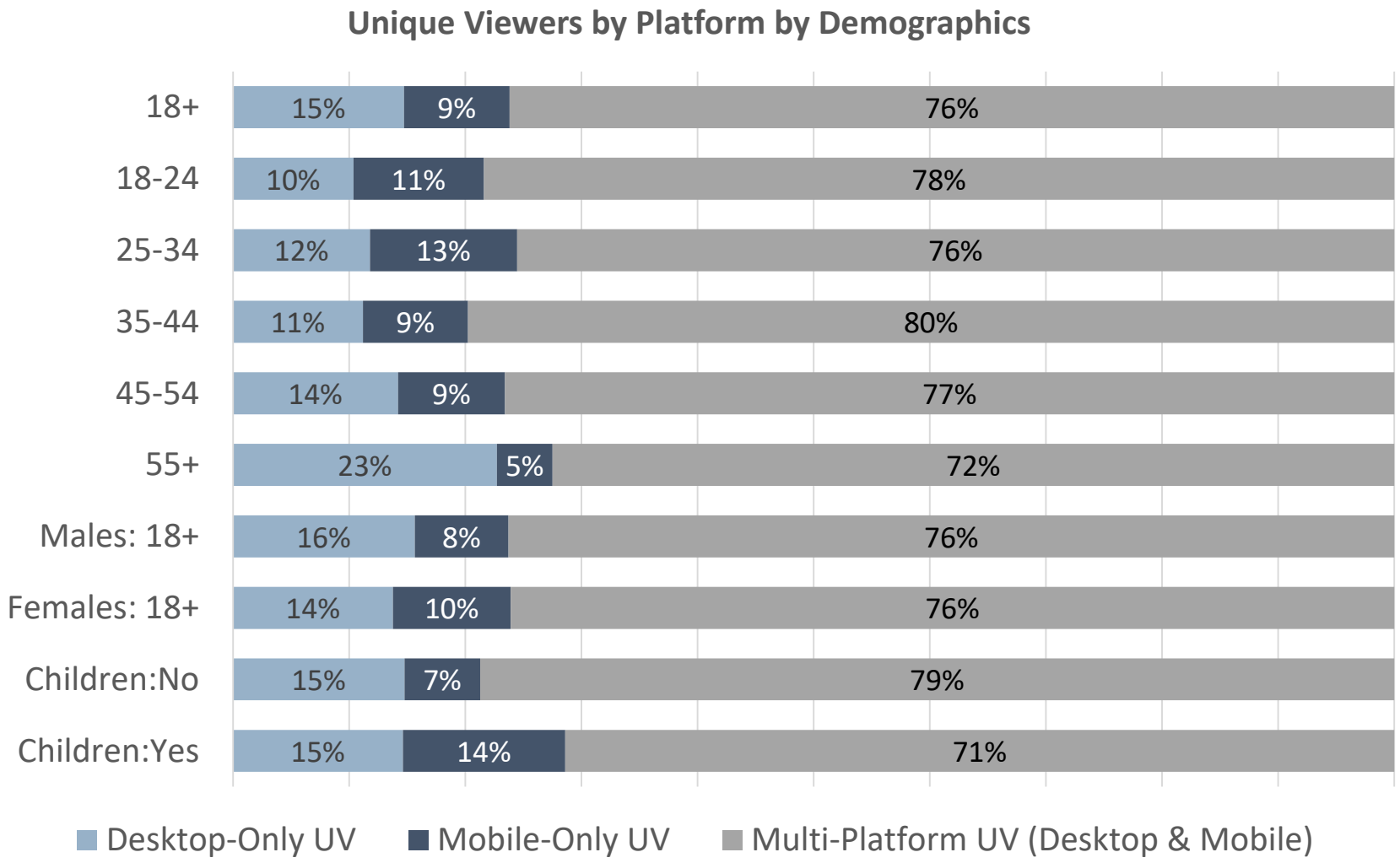
Platform Share by Unique visitors by demographic

¾ of online adults use both a PC and mobile to access the internet



3.9m adults are now mobile only

13% of 25-34s do not use a desktop PC to access the internet

A quarter (23%) of over 55s **ONLY** use the desktop/laptop

Parents are more likely to be mobile only (14%)

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Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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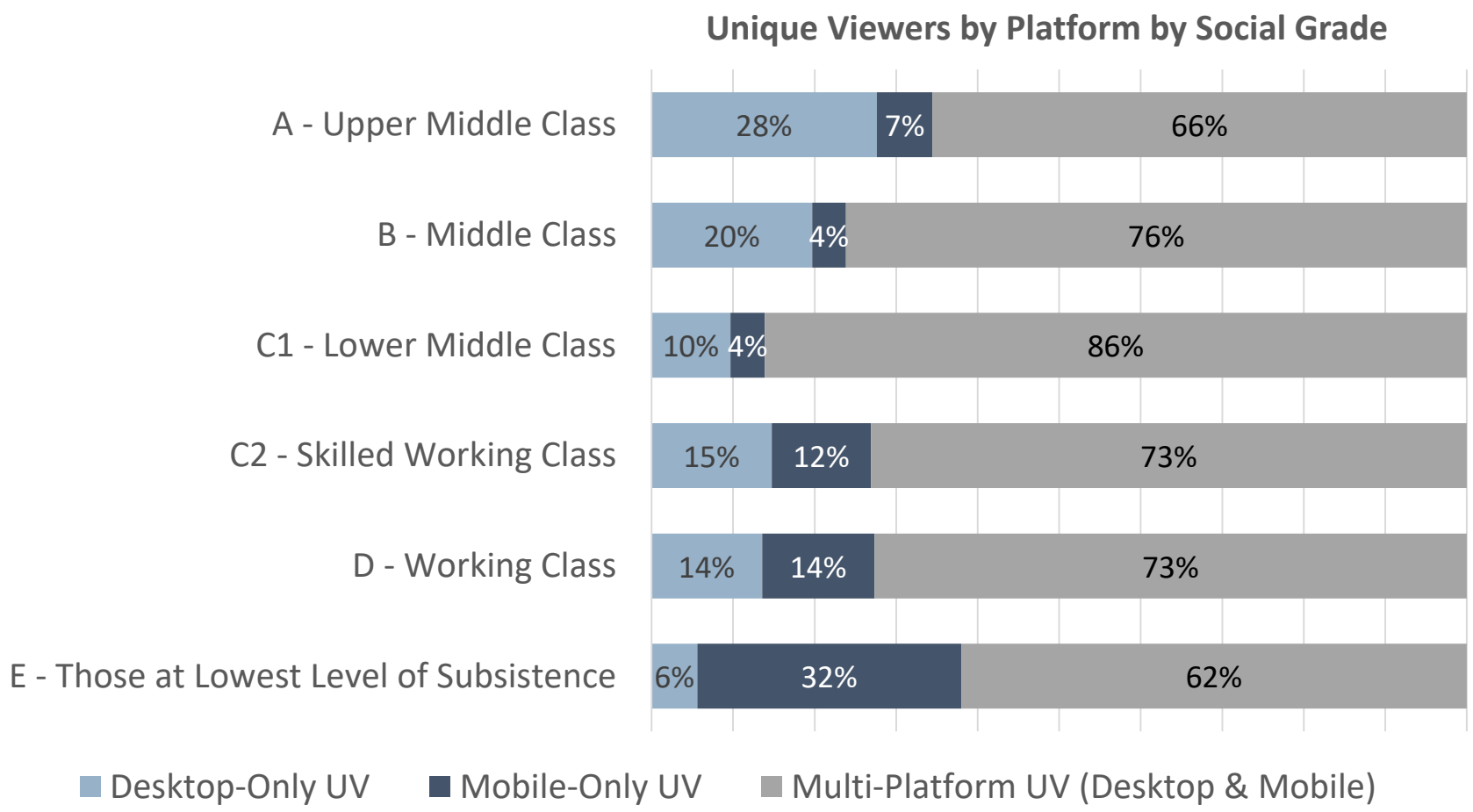
Platform Share by Unique visitors by Social Grade

Highest and lowest social grades least likely to be multi-platform



28% of social grade A only use a desktop PC to access the internet

Lower social classes are more likely to ONLY use a mobile to access the internet

Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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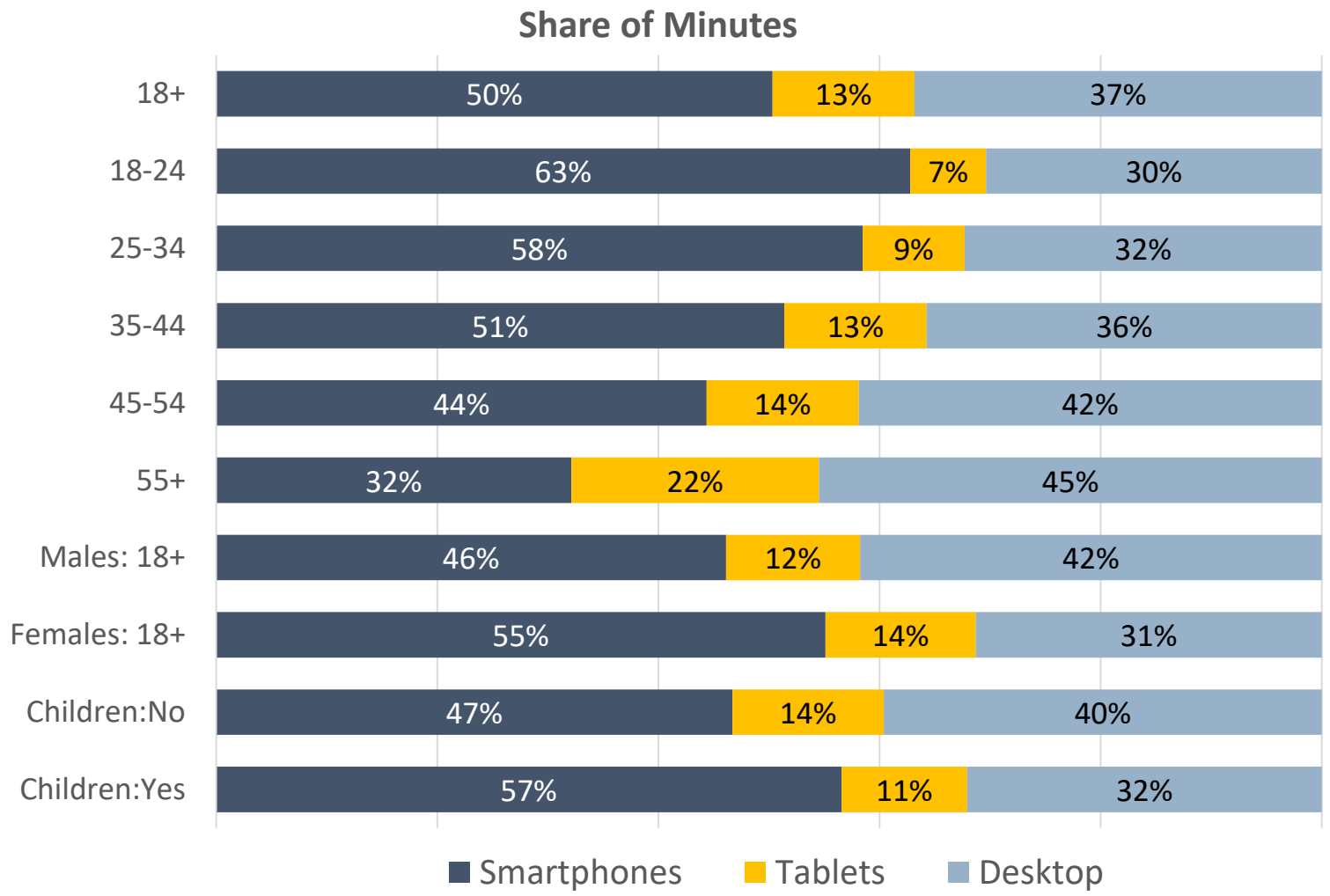
Platform Share of Minutes by Demographic

Millennials, Females & Parents spend greatest share of time on mobile devices



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

Females 18+ spend 69% of their time online on mobile devices compared to only 58% for males. The smartphone takes the lion's share of minutes for females 18+.

Parents spend a greater share of time on smartphones (57%)

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Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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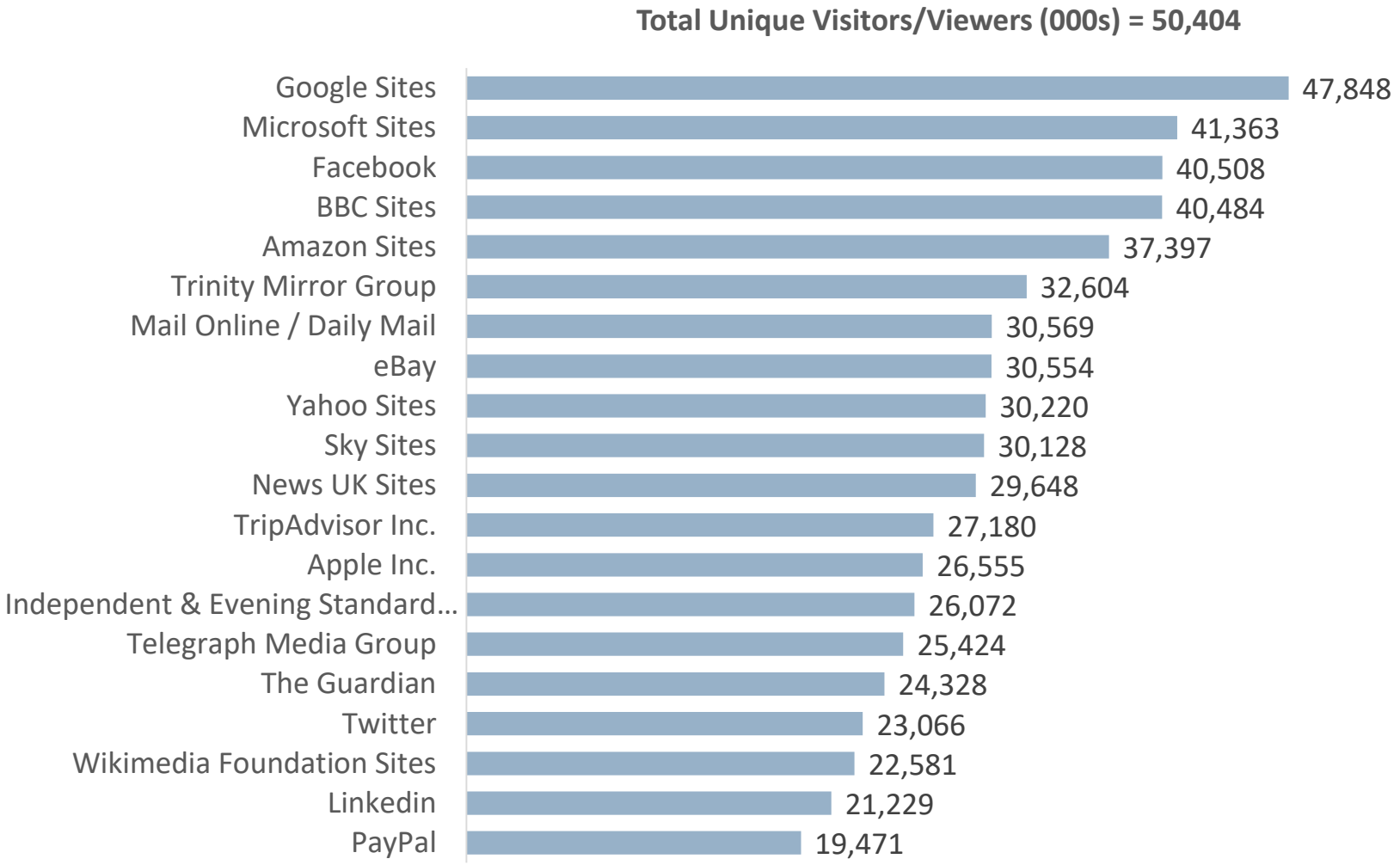
Top Properties – Total Digital Population

Top 20 Properties by 'Unique Visitors' - Total Digital Population (TDP)

Very Little change in top 20 since March 2017



The top 4 all have an online reach of over 80%. Google reach to 94.9%

AOL (no.21) and Yahoo combined (now called OATH) has a reach of 32.6m. Including the Microsoft Display advertising products (Outlook/Skype and MSN) gives them a total audience reach of 42.6m, making them 2nd only to Google

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+

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

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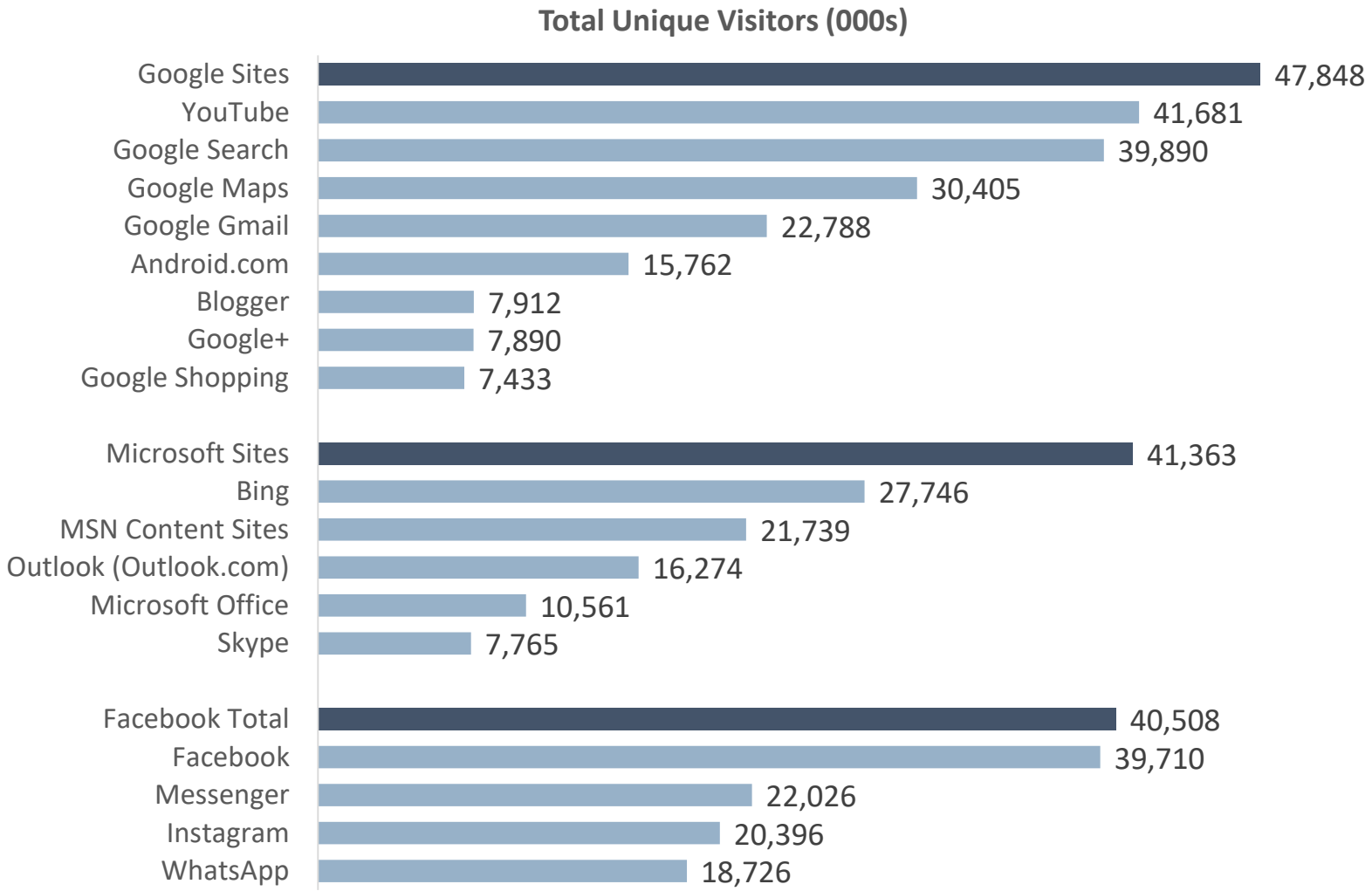
Audience Breakdown of Top 3 Sites

Youtube alone reaches more than all Facebook Properties combined



94.9% of the UK online population used Google.

YouTube alone reaches more than all Facebook properties combined (FB, Instagram & WhatsApp)

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+

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

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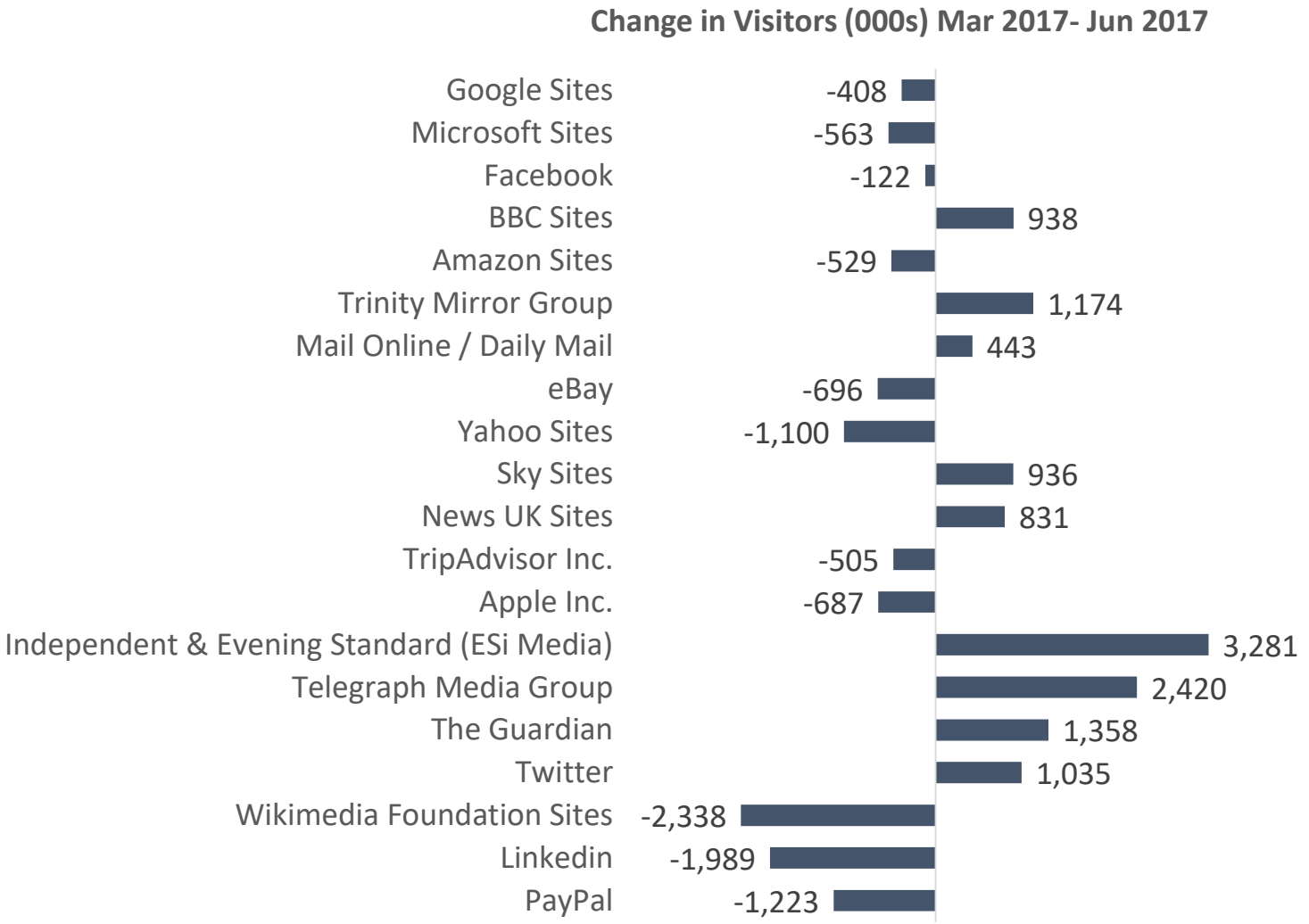
Key Unique Visitor Changes Mar 2017 to Jun 2017: Top 20 Properties

News sites were the major audience beneficiaries



News sites witnessed big gains as major stories (General Election, Terrorist attacks and Grenfell Tower) dominated headlines

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+

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

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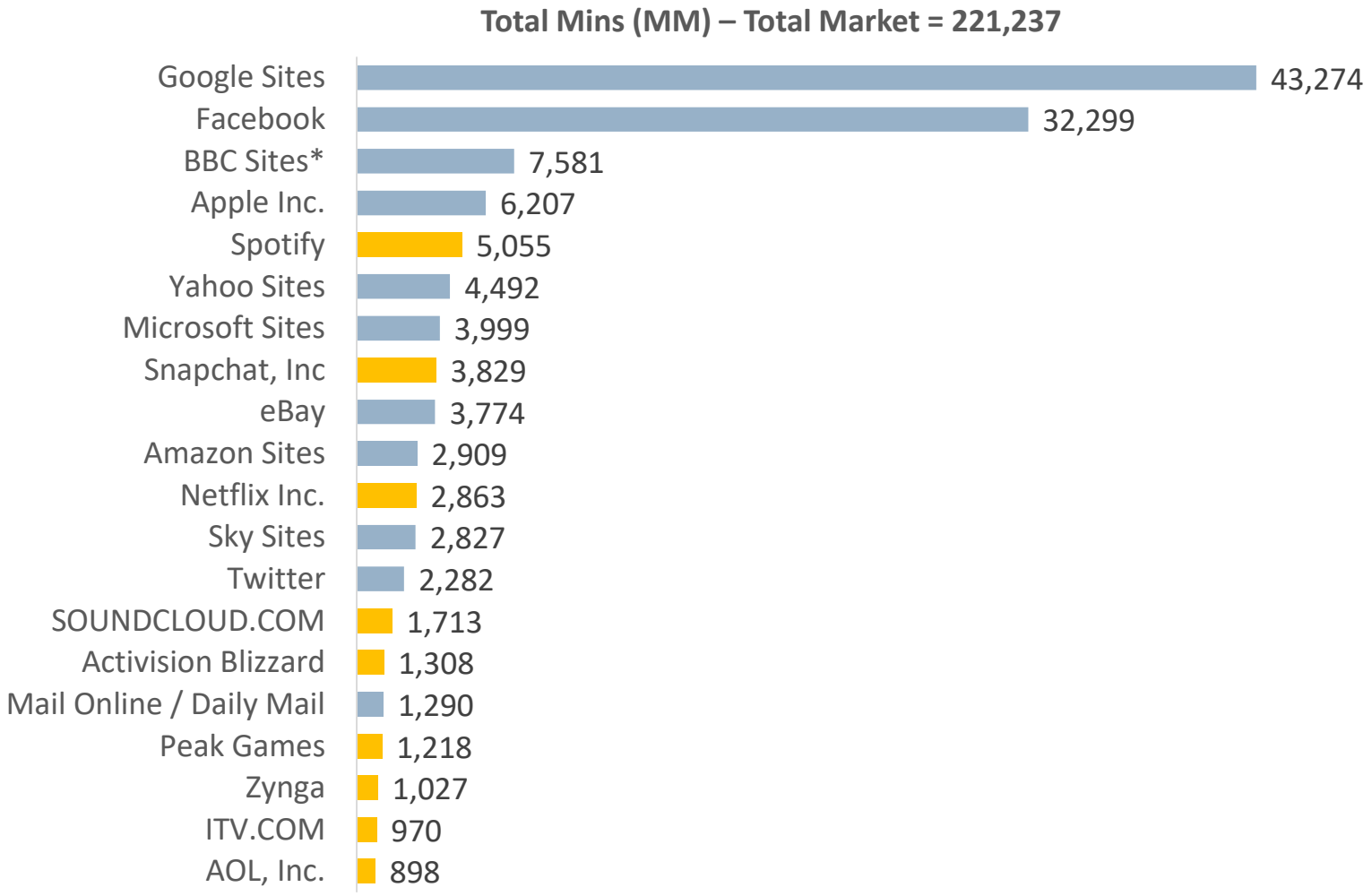
Top 20 Properties by 'Time Spent*' – Total Digital Population (TDP)

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



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

Sky, Snapchat, ITV and AOL each added over 300MM minutes between March and June

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
*In May 2017, comScore and BBC made updates to the mobile SDK implementation within the BBC iOS app which primarily affect duration measurement

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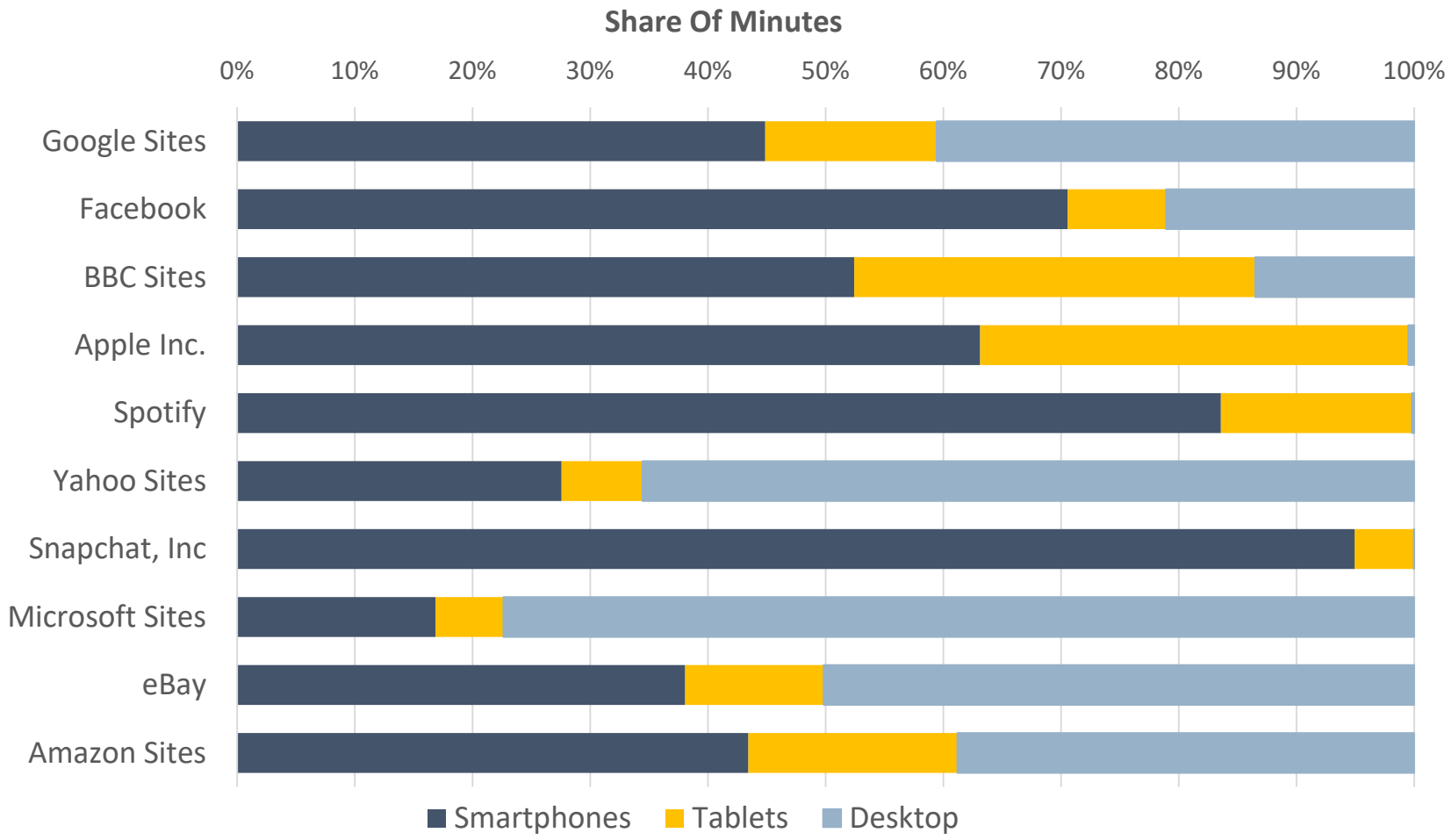
Share of Adults' Time Online by Platform for Top 10 'Time Spent' Properties

Mobile devices account for over 90% of time spent Apple, Spotify & Snapchat



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

BBC & Apple have highest Tablet share out of top 10

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

comScore

Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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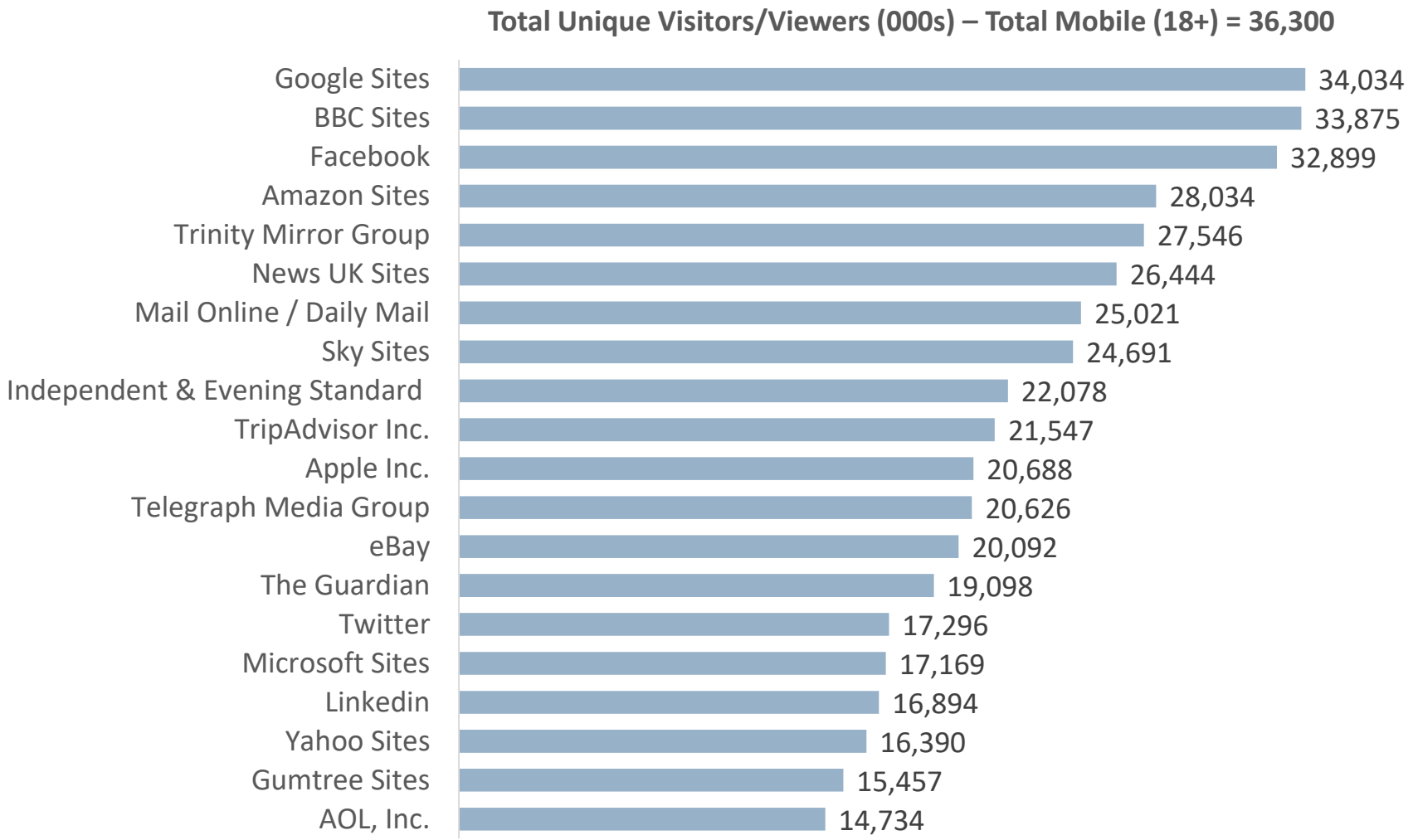
Top Properties – Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

36m adults accessed mobile content in June 2017 (via browser and app)



AOL enters top 20 at the expense of Wikimedia

comScore

Source: comScore Mobile Metrix, June 2017, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
UKOM: Development Endorsement

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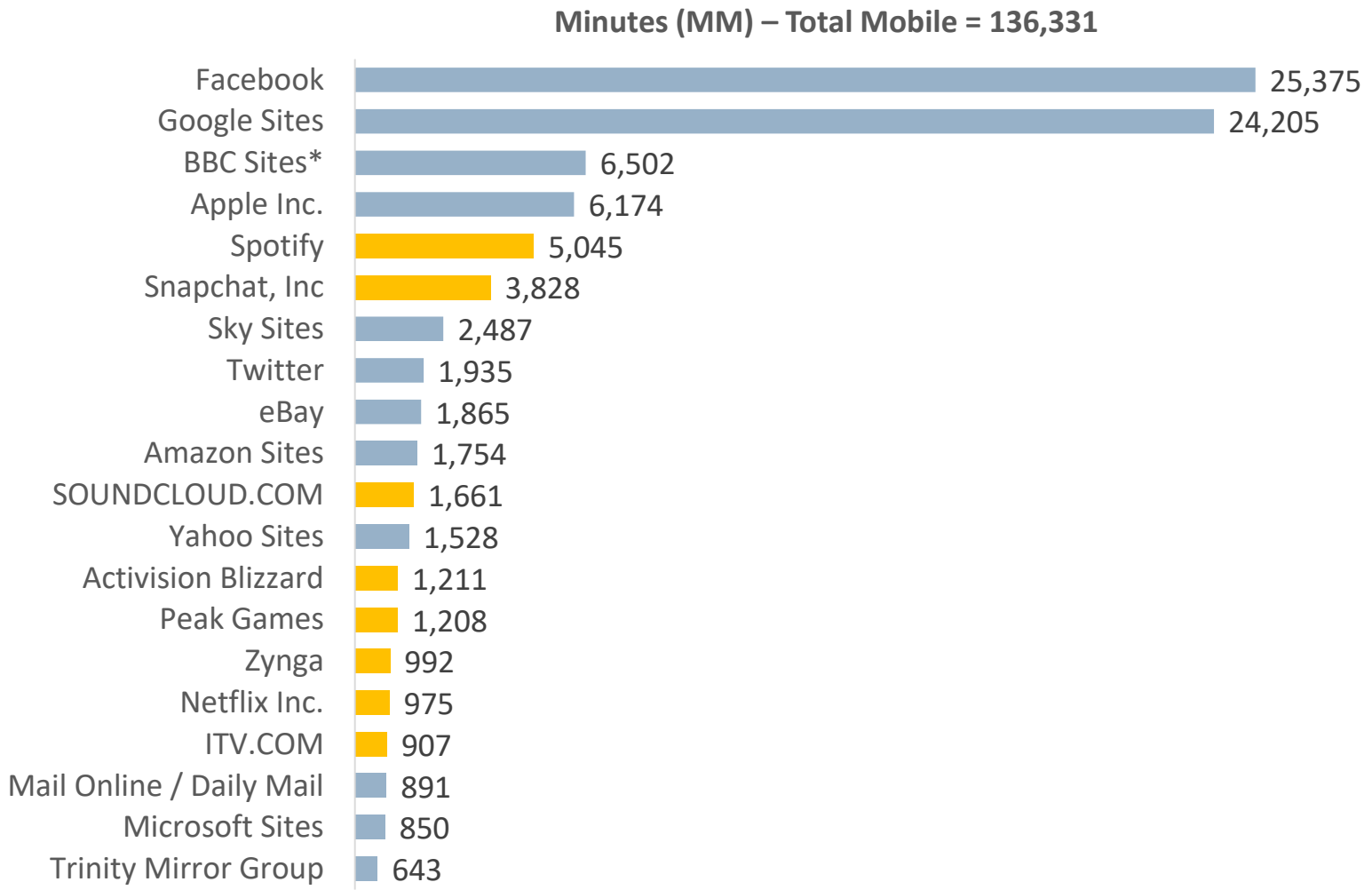
Top 20 Mobile Properties ranked by minutes

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



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

comScore

Source: comScore Mobile Metrix, June 2017, UK, Age 18+
Please note that ‘mobile’ includes smartphone and tablet usage combined
UKOM: Development Endorsement
*In May 2017, comScore and BBC made updates to the mobile SDK implementation within the BBC iOS app which primarily affect duration measurement

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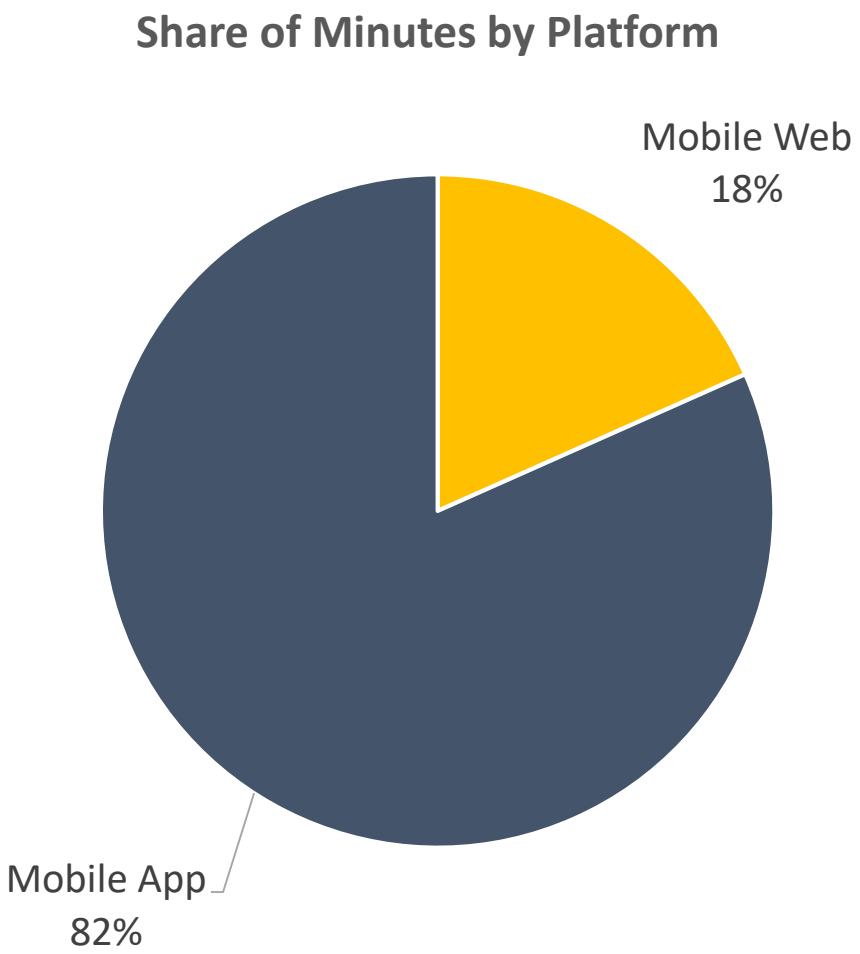
Share of Mobile Minutes by Access Type

4 in 5 mobile minutes come from applications



Source: comScore Mobile Metrix, June 2017, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
UKOM: Development Endorsement

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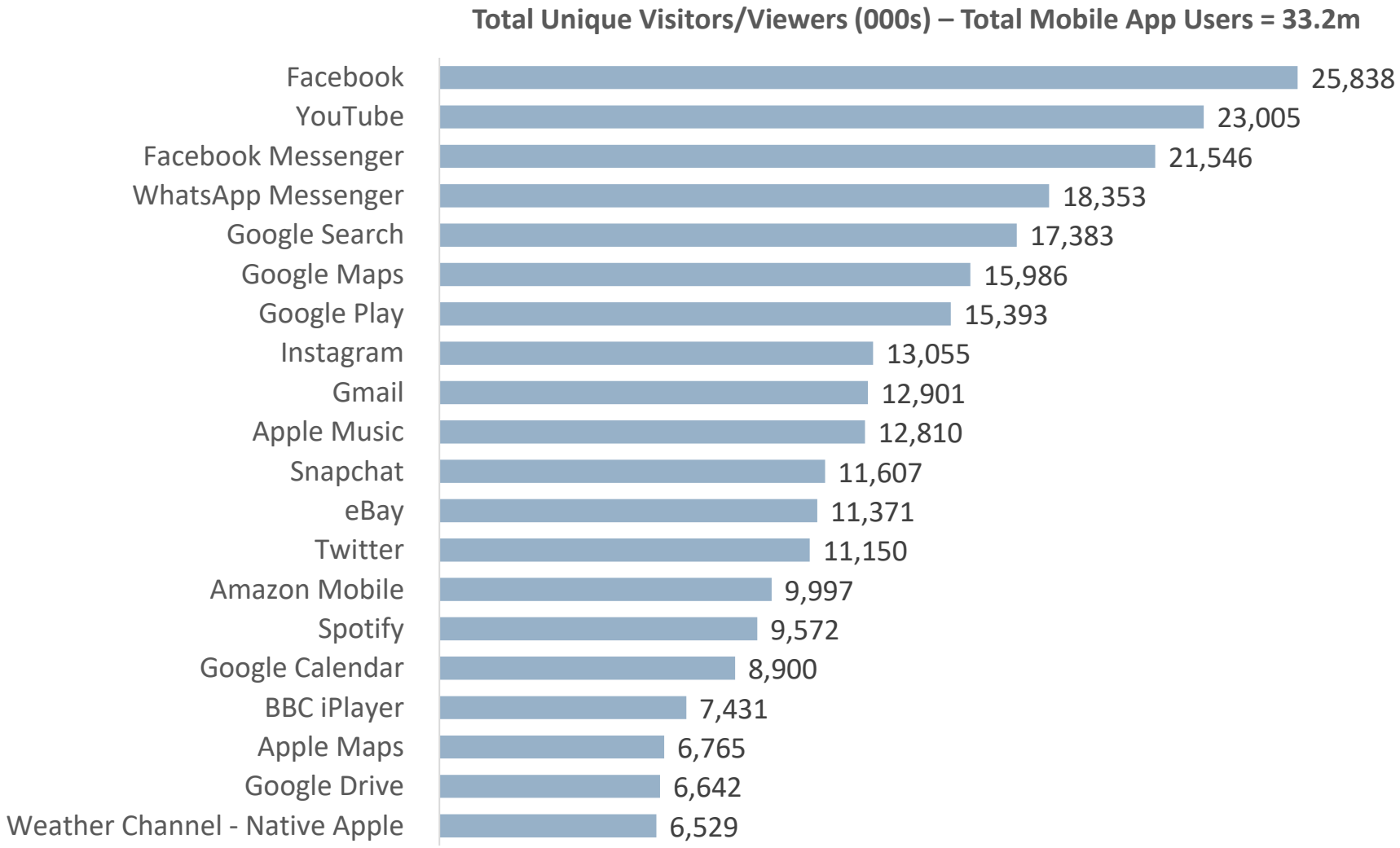
Top 20 Mobile (Tablet & Smartphone) Apps ranked by Unique Visitors

9 of the top 10 apps are owned by Google or Facebook



comScore

Source: comScore Mobile Metrix, June 2017, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
UKOM: Development Endorsement

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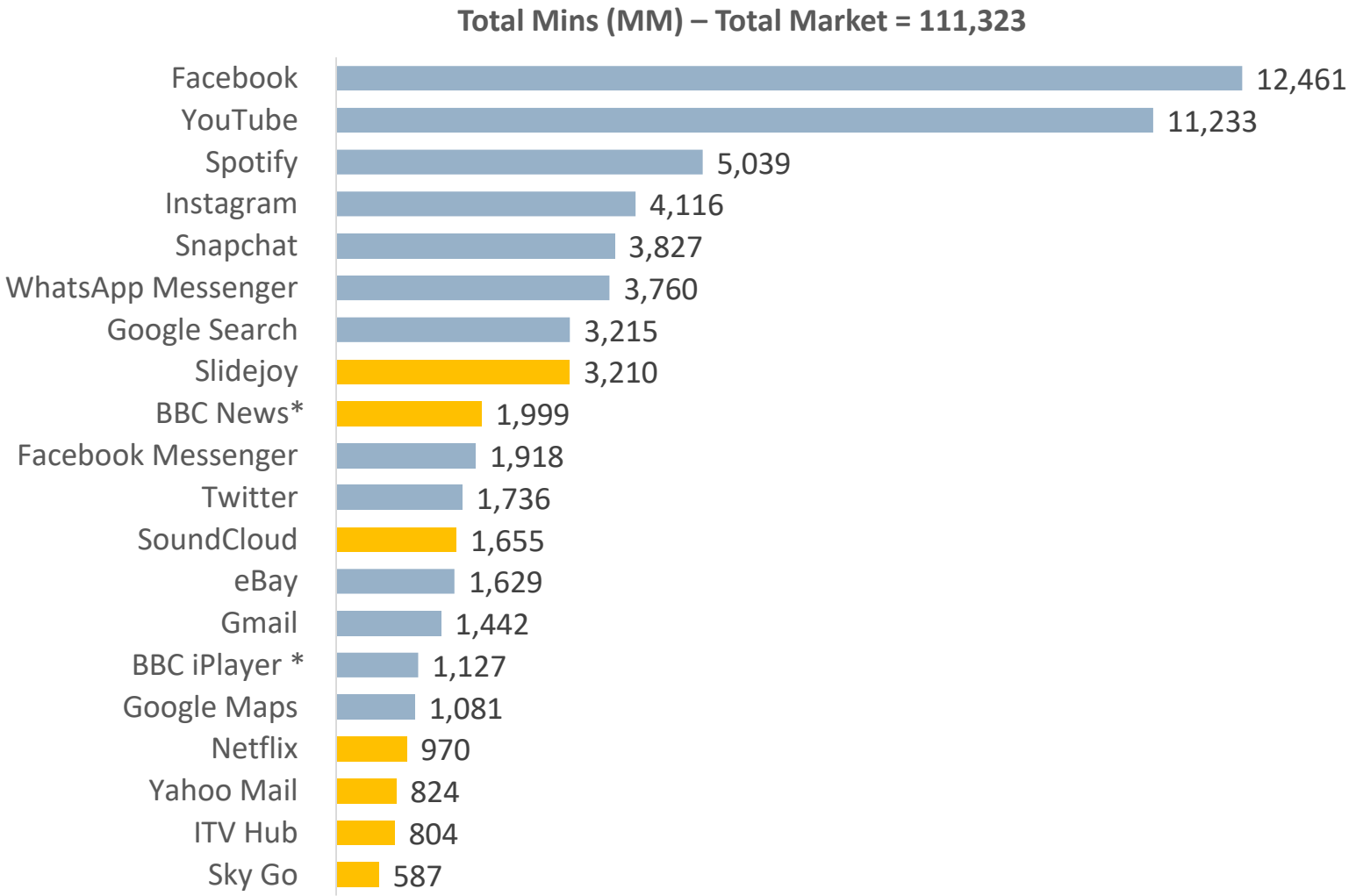
Top 20 Mobile (Tablet & Smartphone) Apps ranked by Minutes

Spotify, Snapchat, BBC and Slidejoy are in the top 10 for minutes spent on apps



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

comScore

Source: comScore Mobile Metrix, June 2017, UK, Age 18+
Please note that 'mobile' includes smartphone and tablet usage combined
UKOM: Development Endorsement
*In May 2017, comScore and BBC made updates to the mobile SDK implementation within the BBC iOS app which primarily affect duration measurement

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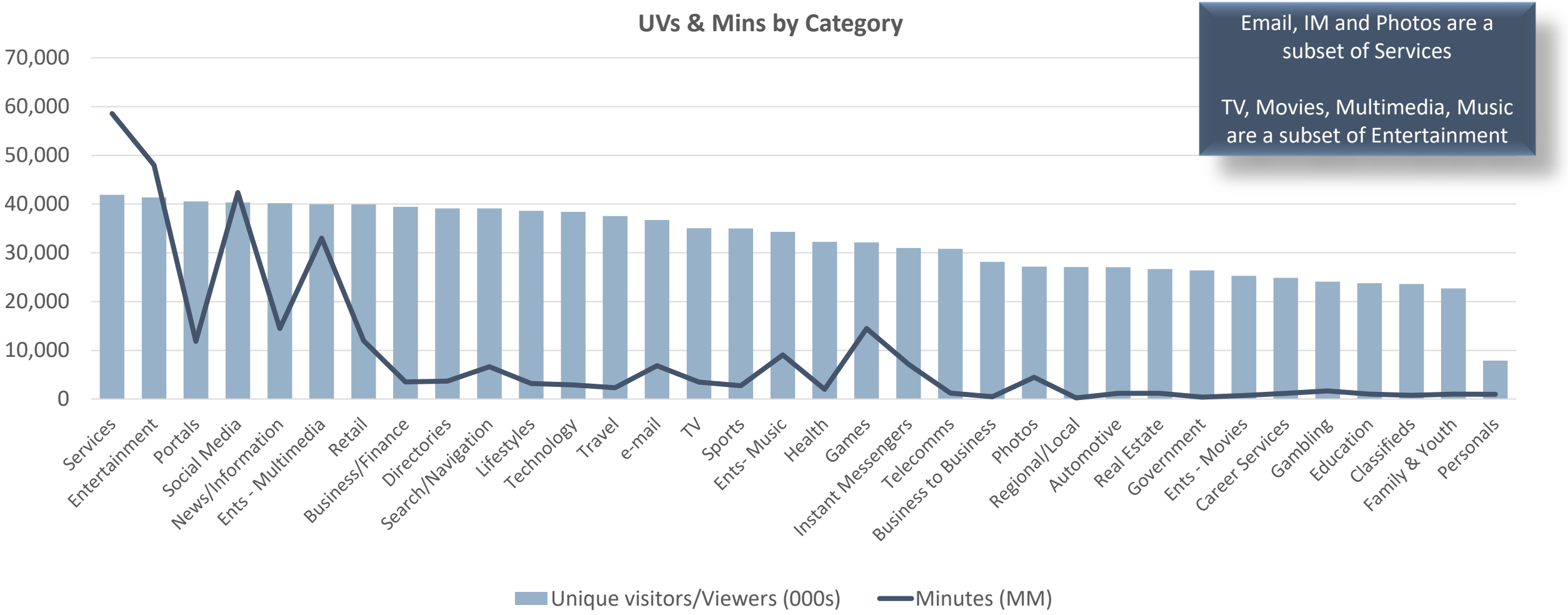
Categories

Major Categories Online – Unique Visitors v Minutes

Entertainment, Social Media & Games sites have high engagement



Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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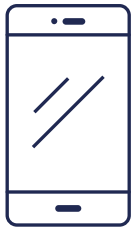
Platform’s share of time online differs by category

Desktop total

37%



Smartphone total

50%

Tablet total

13%

Education	91%
Autos Manufacturer	91%
Toys	91%
Computer Software	87%
Car Rental	84%
Retail - Sports/Outdoor	83%
Government	78%
Pharmacy	78%
Auctions	77%
Airlines	77%

Instant Messenger	92%
Gay/Lesbian	91%
Photos	91%
Job Search	86%
Books	81%
Maps	81%
Retail - Music	79%
Coupons	78%
Health	77%
Entertainment - Music	75%

TV	42%
Kids	36%
Family & Youth	27%
News/Information	24%
Radio	23%
Games	23%
Real Estate	18%
Travel - Information	17%
Ents: Multimedia	16%
Newspapers	16%

comScore

Source: comScore MMX Multi-Platform, June 2017, UK Adults 18+

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

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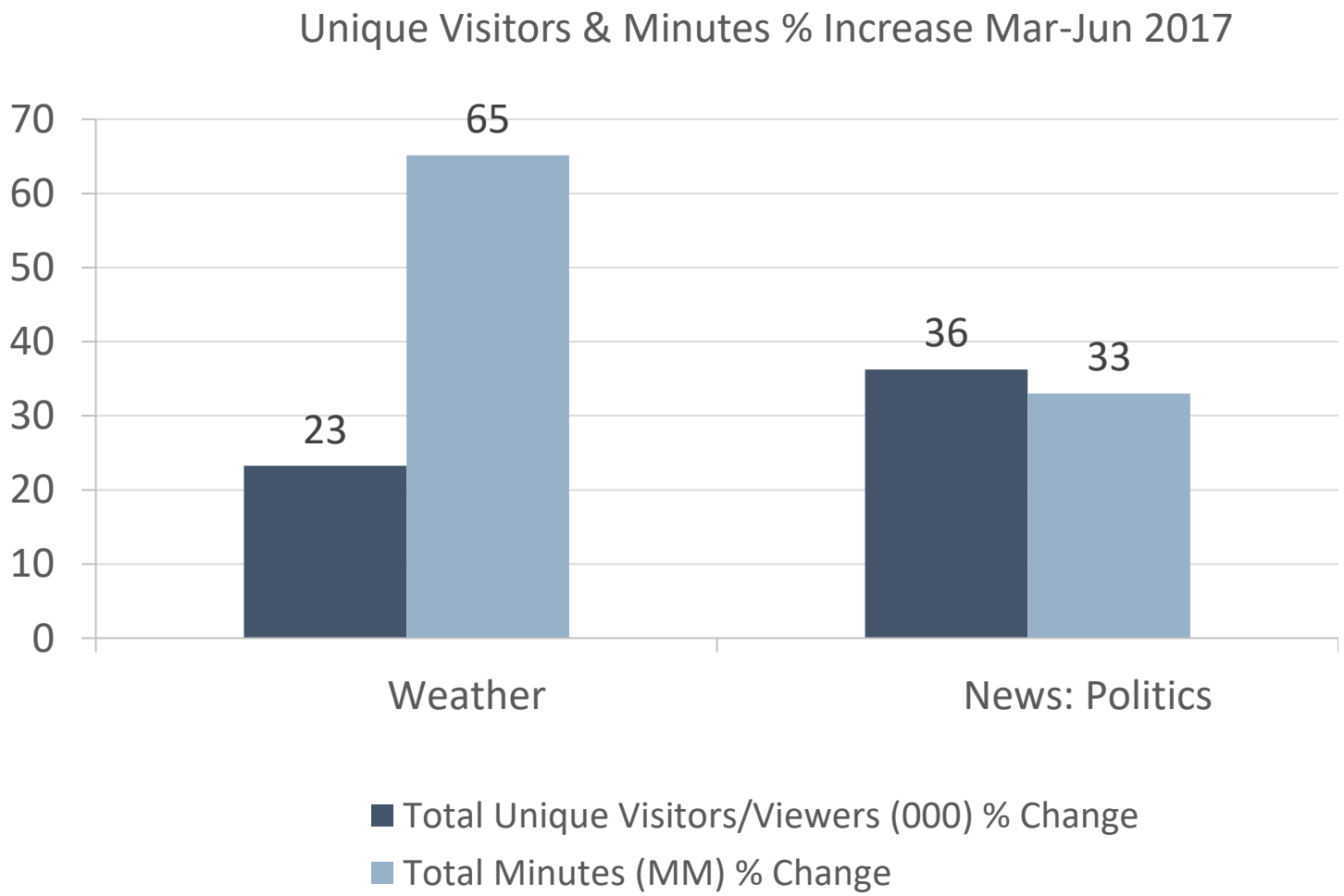
Key Changes
Mar 2017-June 2017

Categories with >10% growth for Visitors AND Minutes Mar-Jun 2017

Politics (News) and Weather are the only categories which experienced large growth



Weather Category UV increase follows seasonal trends. Jun-Aug are typically highest audience months. The Weather Company, BBC & Accuweather drove the gains

Election contributed to Politics increase. Guardian and BBC both added 3.8 million visitors in the month of June

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+

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

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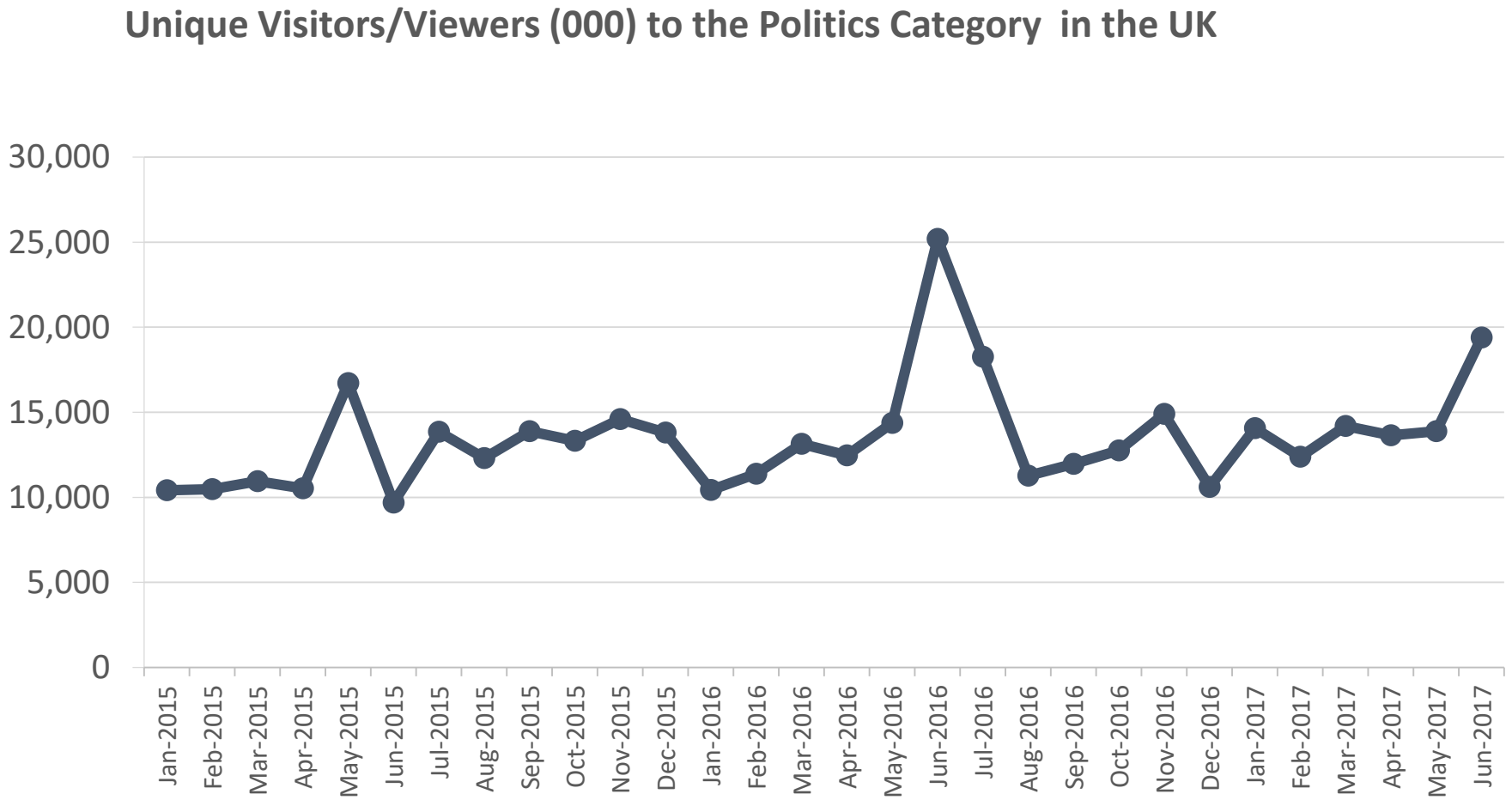
Unique Visitors to the Politics Category Jan 2015-Jun 2017

The General Election contributed to a 5.5 million increase between May and June



Reach increased by 13% points between May and June 2017. This increase was similar to that of the General Election in May 2015 (+ 15.5% pts) but much lower than the Brexit uplift in June 2016 (+26% pts)

comScore

Source: comScore MMX Multi-Platform, News Information – Politics category, age 18+.

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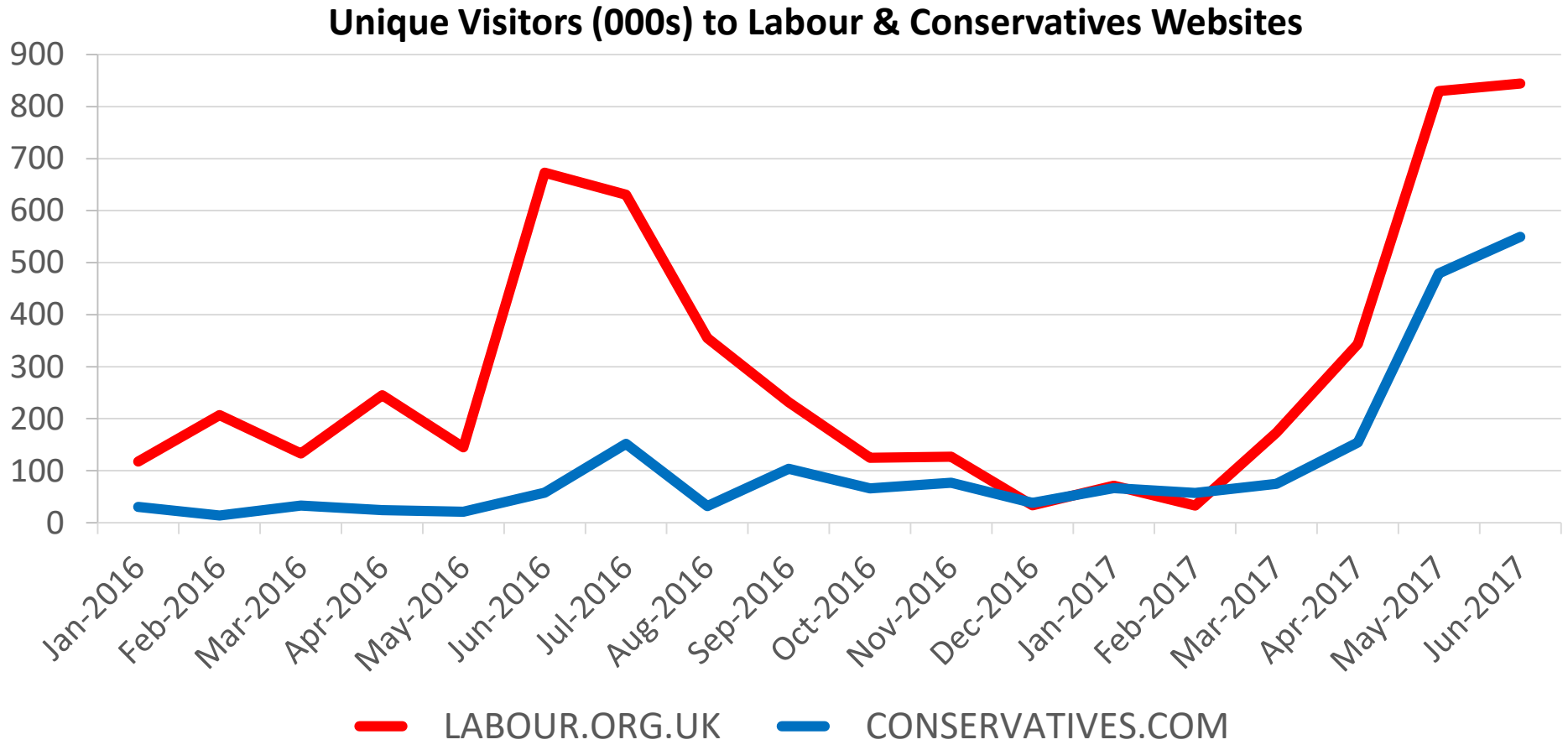
Unique Visitors to Labour & Conservative Websites Jan 2016-Jun 2017

Labour witnessed the bigger increases during the last 2 major votes



Interest in Labour's site commenced earlier and visitor growth was higher in the run up to the 2017 election

comScore

Source: comScore MMX Multi-Platform, News Information – Politics category, age 18+.

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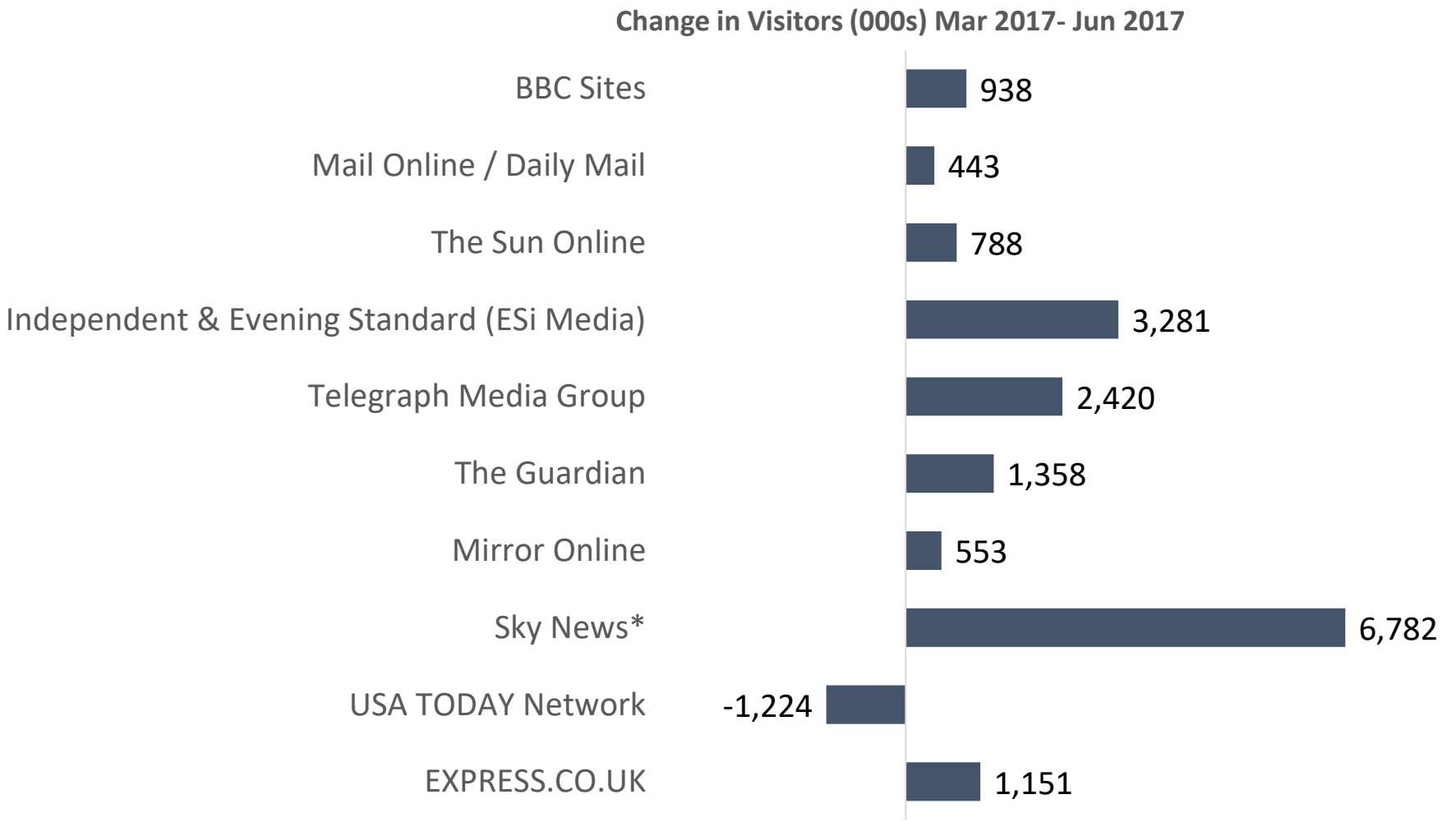
Unique Visitors to the top 10 News/Information sites Mar 2017- June 2017

UK News/information sites also witnessed big audience gains



June was a big UK news month with the General Election, Borough Market terrorist attacks & the Grenfell Fire all dominating headlines

The overall News category didn't increase as the US press e.g. USA Today, Washing Post, CBS News, & NY Times all saw declines

comScore

Source: comScore MMX Multi-Platform, June 2017, Desktop age 6+, Mobile age 18+
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps
Prior to June 2017, Apple News - Sky News traffic was assigned to the SKY.COM entity instead of [C] Sky News

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Questions?

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

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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

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About comScore

comScore, Inc. (NASDAQ: SCOR) is a global leader in digital measurement and analytics, delivering insights on web, mobile and TV consumer behaviour that enable clients to maximise the value of their digital investments.

A preferred source of digital audience measurement, comScore offers a variety of on-demand software and custom services within its four analytics pillars: Audience Analytics, Advertising Analytics and Digital Business Analytics. By leveraging a world-class technology infrastructure, the comScore Census Network™ (CCN) captures trillions of digital interactions a month to power big data analytics on a global scale for its more than 2,000 clients, which include leading companies such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, LinkedIn, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon, ViaMichelin and Yahoo!.

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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/

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