UKOM

Digital Market Overview

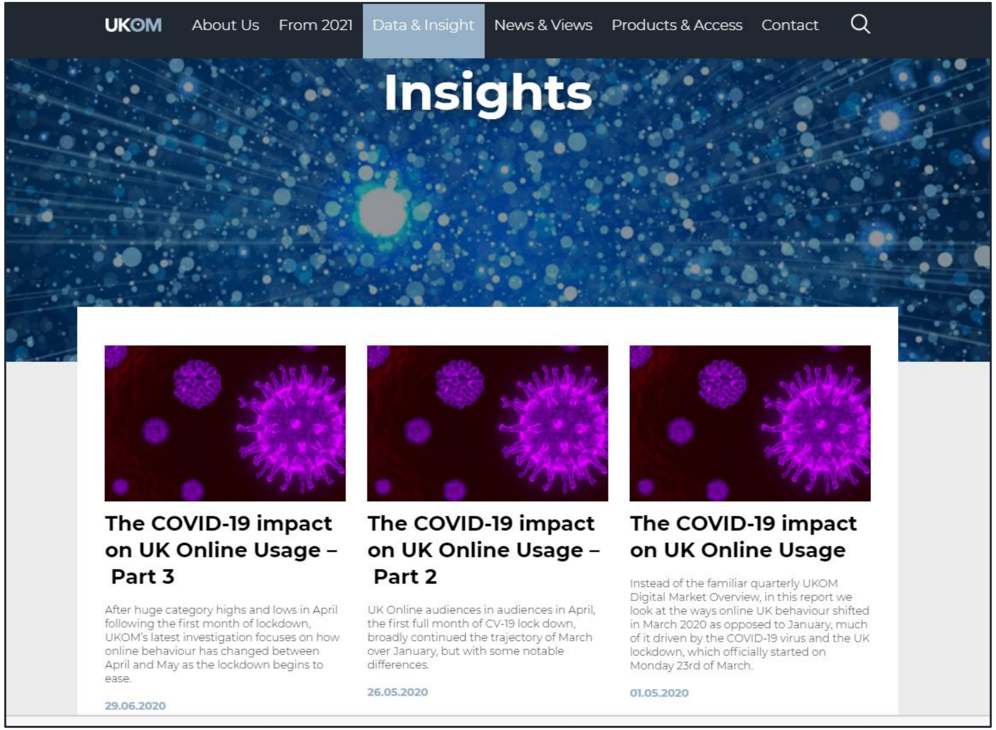
June 2020

The UK Digital Market Overview Jun 2020

This Digital Market Overview focuses on UK audience usage in June 2020 and where appropriate, how it compares to Jan 2020, pre-pandemic.

A brief update on the impact of Covid-19/lockdown on key categories can be found at the end of the report. For detailed analysis of monthly UK online behaviour between
Jan and May 2020, please access UKOM's series of additional insights at

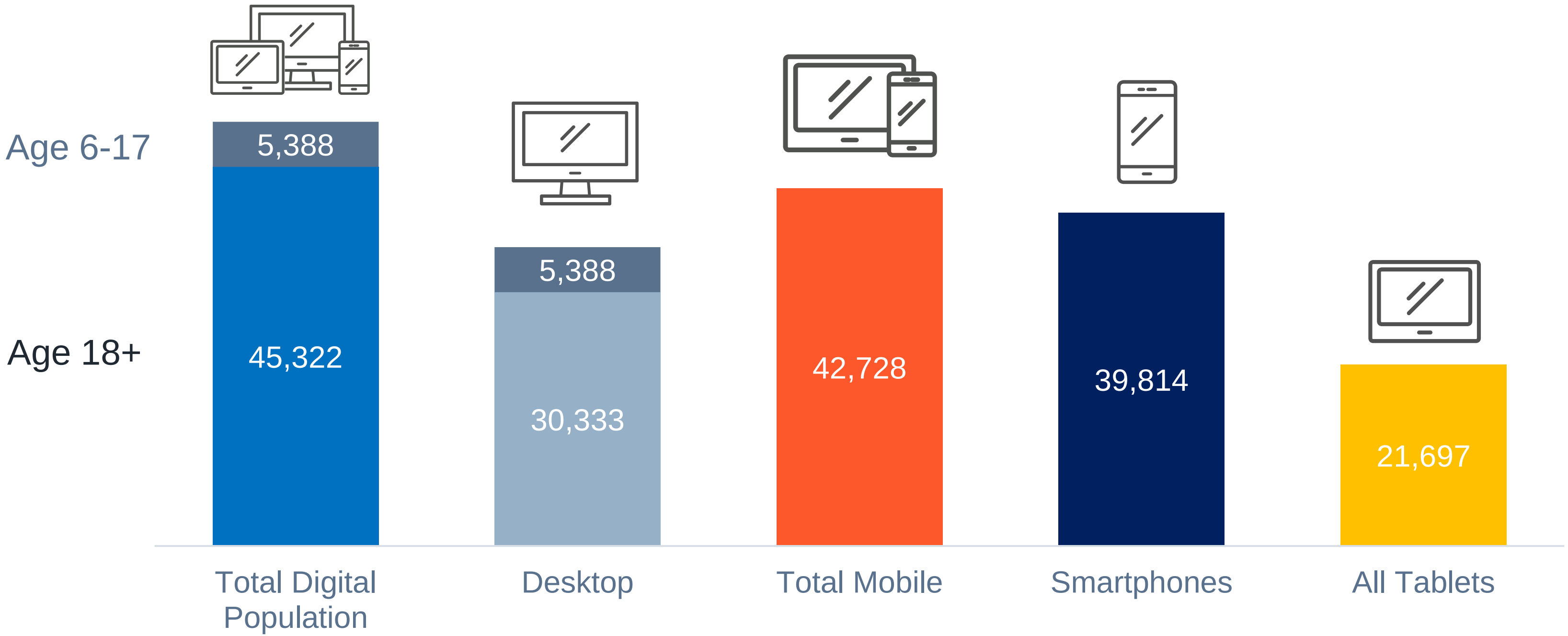
www.ukom.uk.net



Audience by Platform

Digital unique visitors by platform (000s)

More people use smartphones than PCs



Source: Comscore MMX Multi-Platform, Desktop age 6+, Mobile age 18+, June 2020, UK.
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 (000s)

Smartphone use is the most popular platform across all age groups

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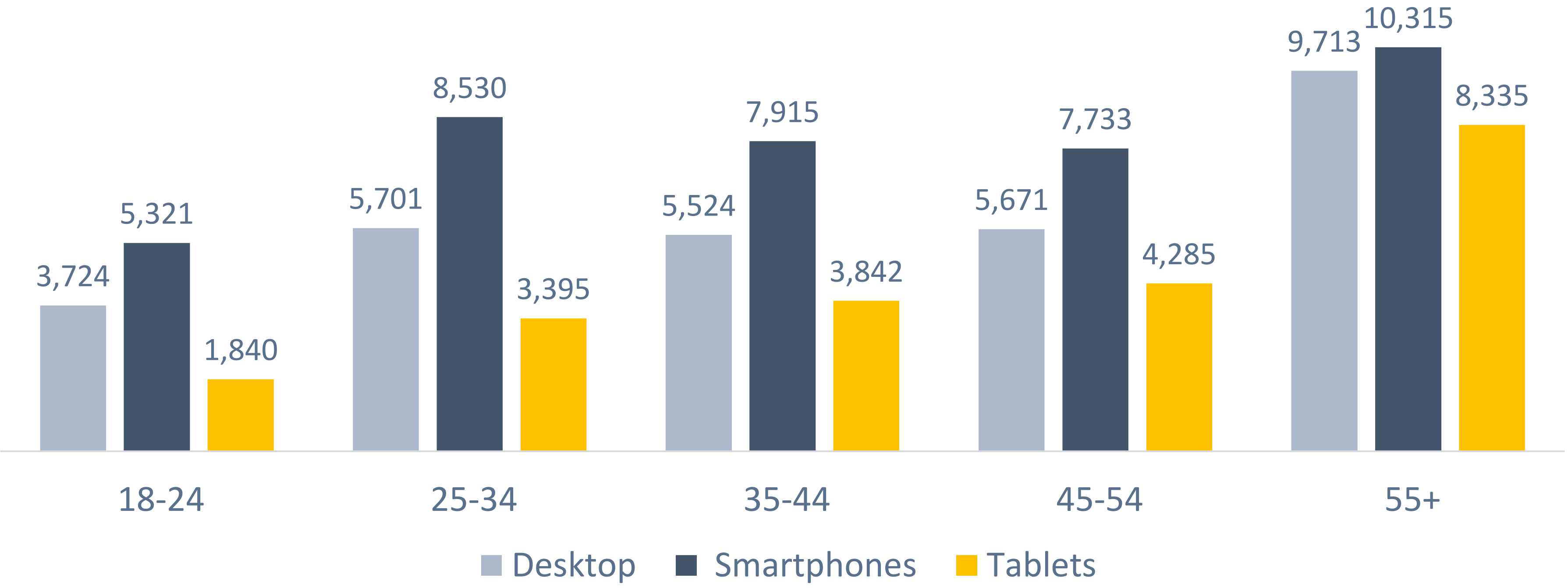


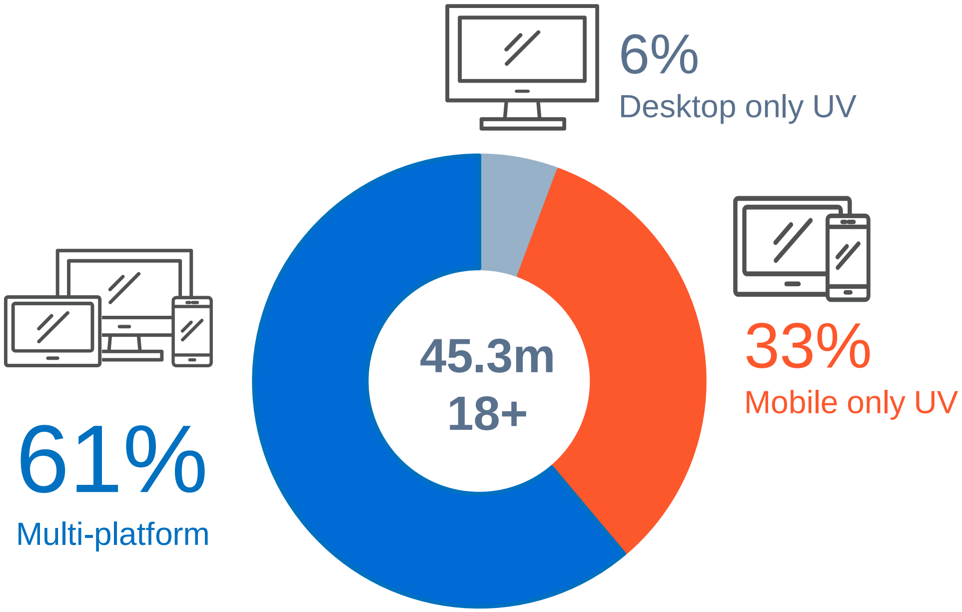
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, June 2020, UK

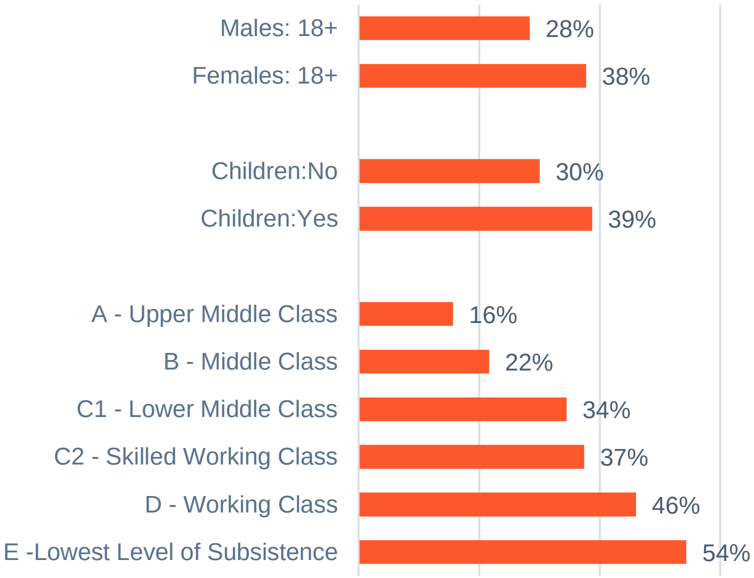
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps.

Multi and solus platform unique visitors

1/3 of adults are mobile only – higher among females, parents and lower social grades



'Mobile only' share by demos



comscore

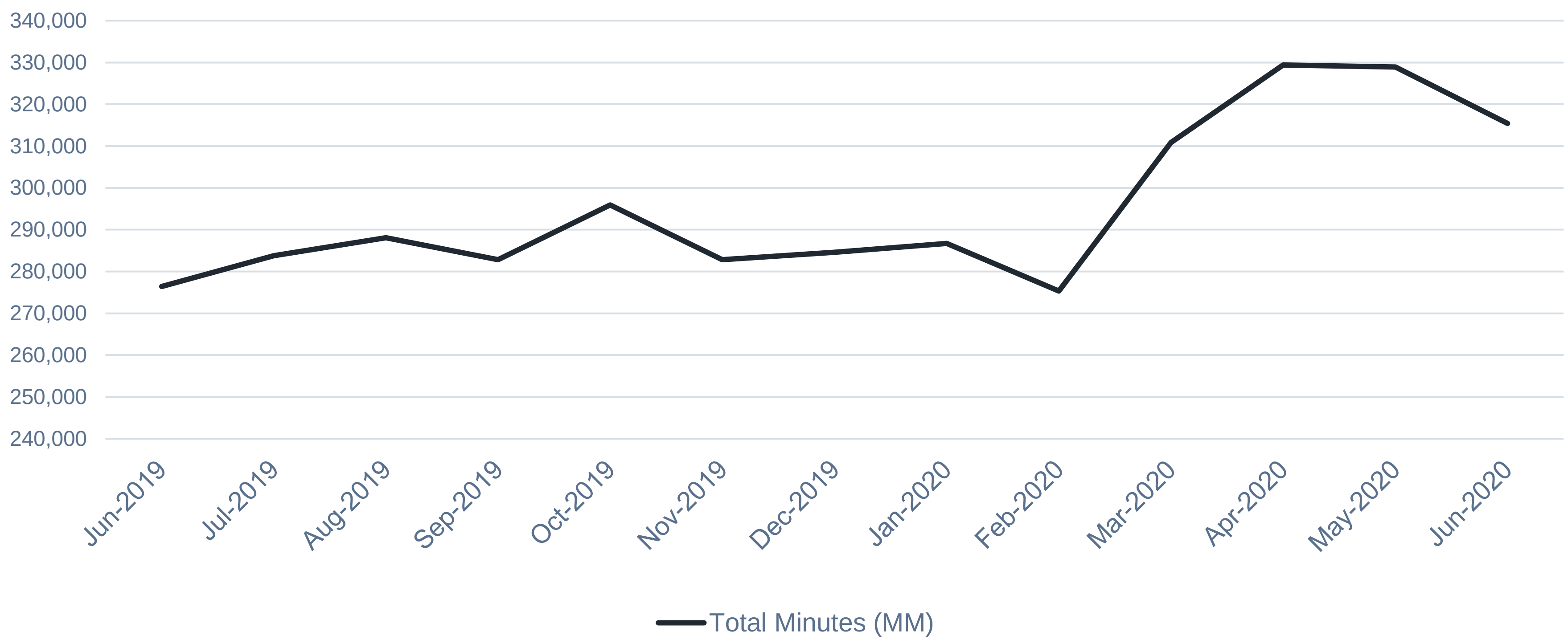
Source: Comscore MMX Multi-Platform, Adults 18+, June 2020, UK

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

Time online

Total minutes online: Jun 19 - Jun 20

Total time peaked in Apr 2020, up by 15% versus Jan 2020 before tapering off



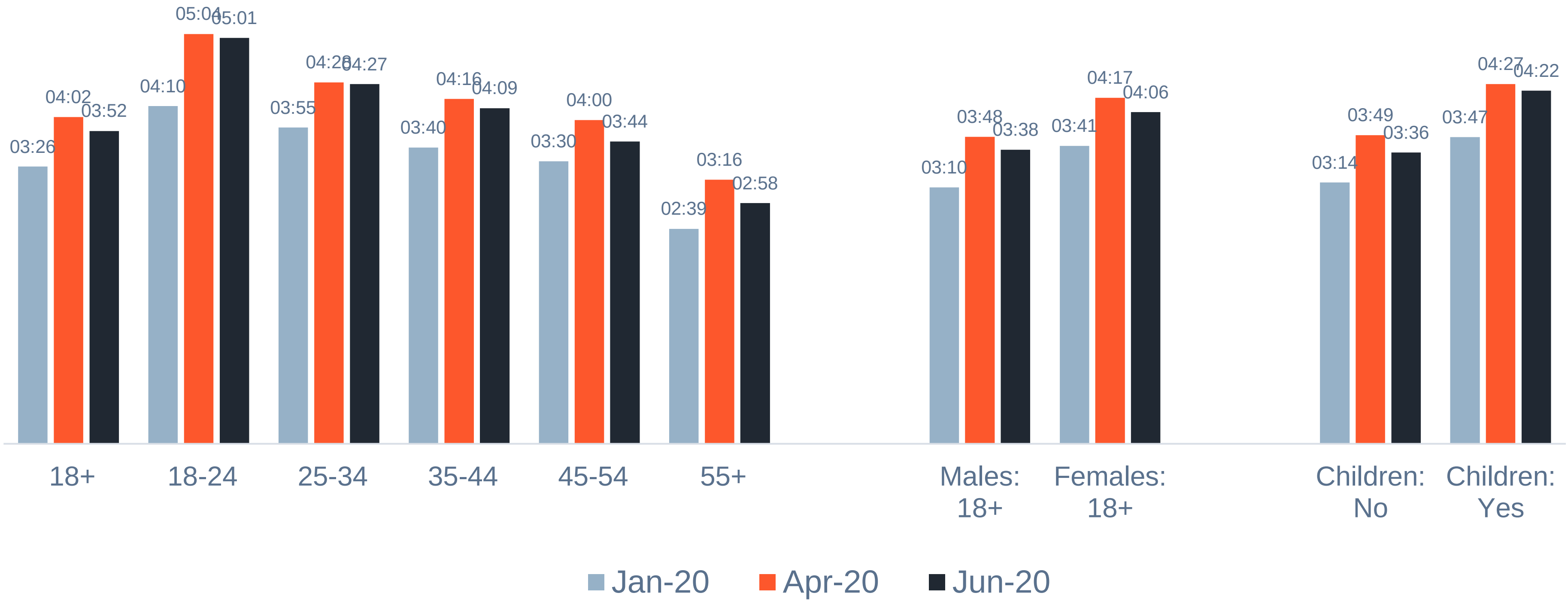
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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

Average time online per day by demos (hr:min)

Adults are spending almost half an hour per day more online than they were pre pandemic



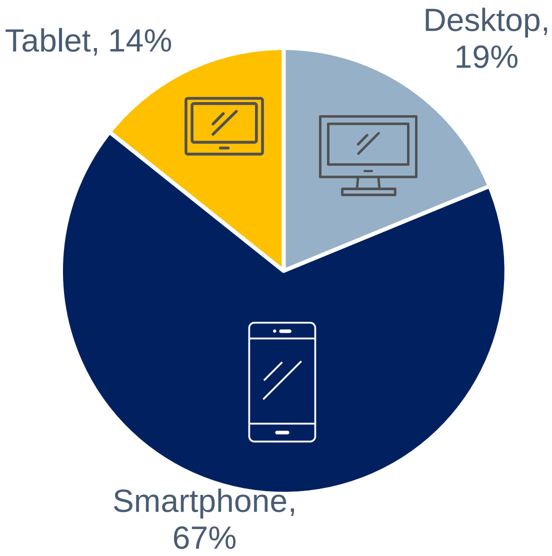
Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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

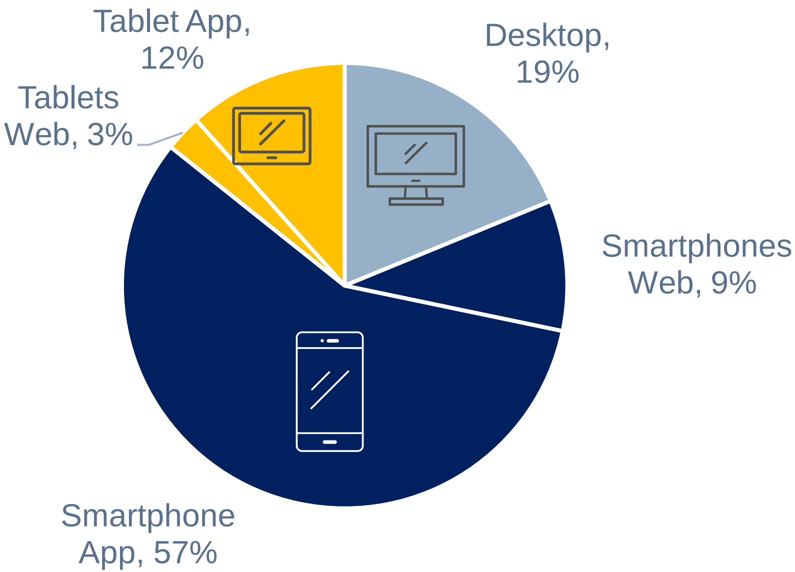
Share of minutes by platform

Smartphones account for 67% of time online with apps alone accounting for 57%

By platform



By access type

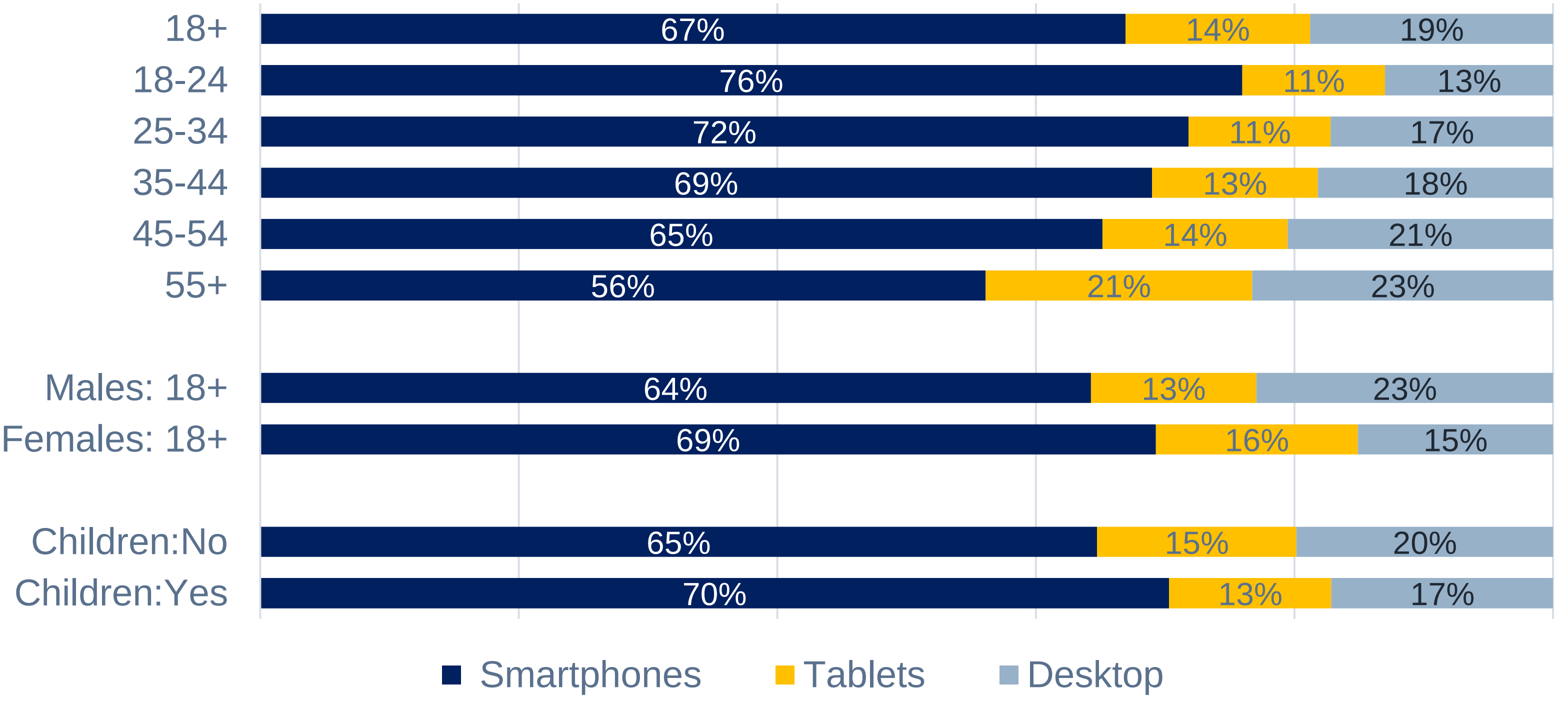


Source: Comscore MMX Multi-Platform, Adults 18+, June 2020, UK

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

Platform share of minutes by demographics

18-24s, females & parents spend greatest share of time on mobile devices



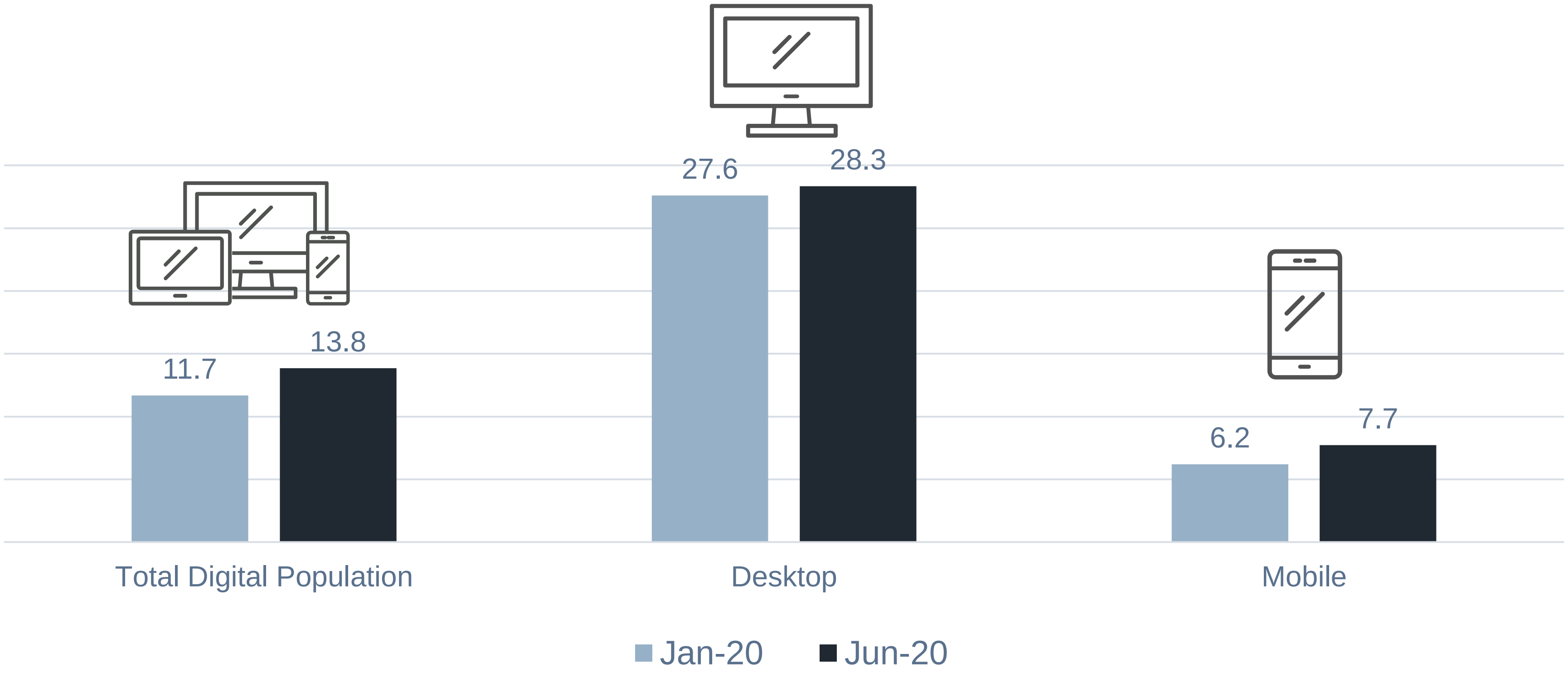
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, June 2020, UK

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

Average minutes per visit by platform

Average visit length has increased since January for all platforms. Mobile visits are shortest



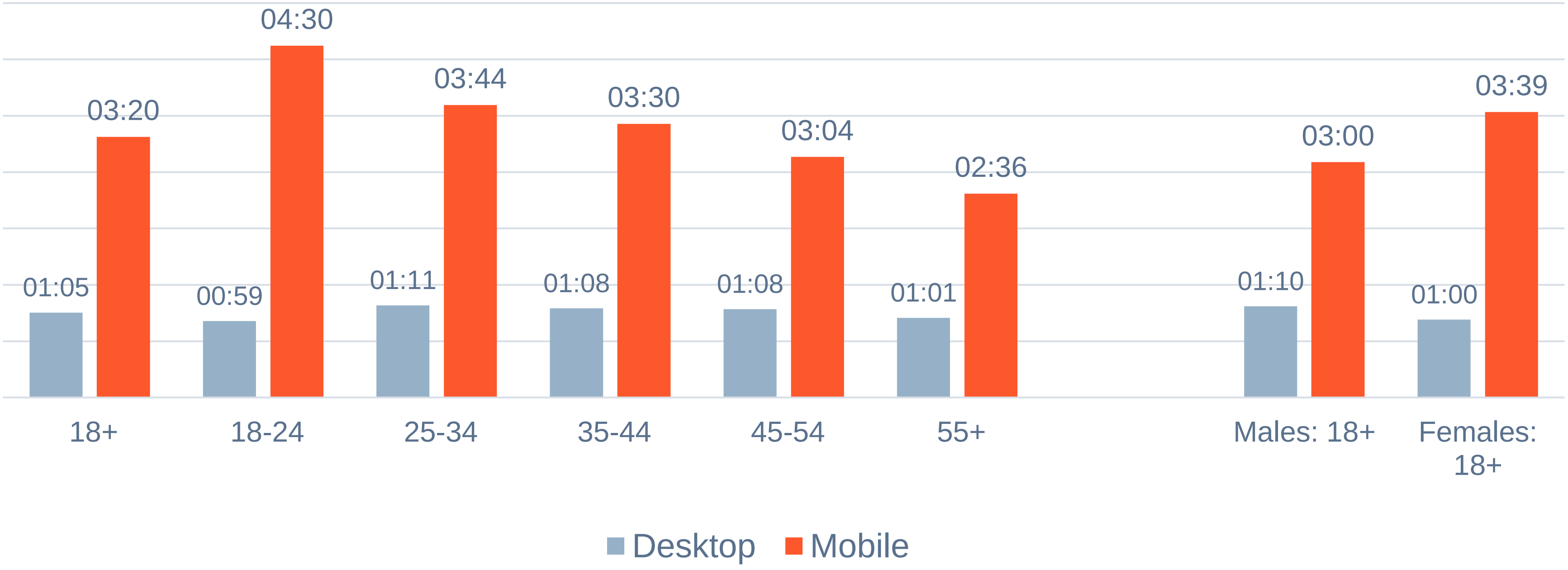
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. Desktop refers to desktops and laptops

Average time online per day by platform (hr:min)

Adults spend 3x longer on mobile devices than desktop/laptops each day



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Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2020, UK

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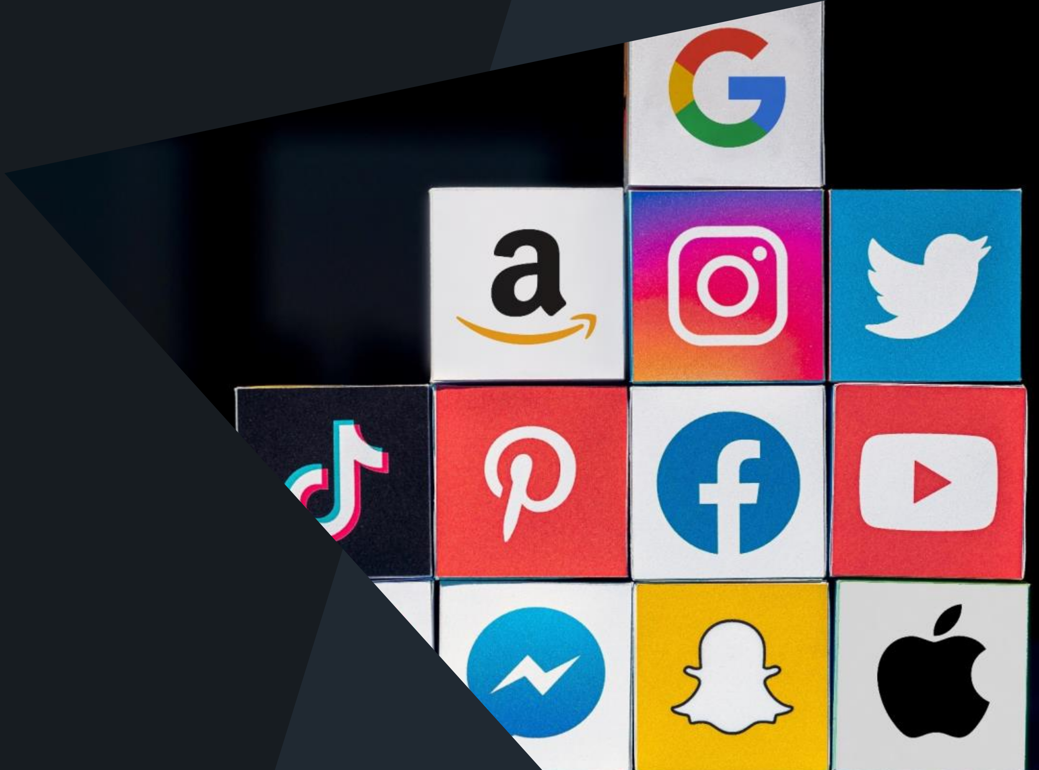
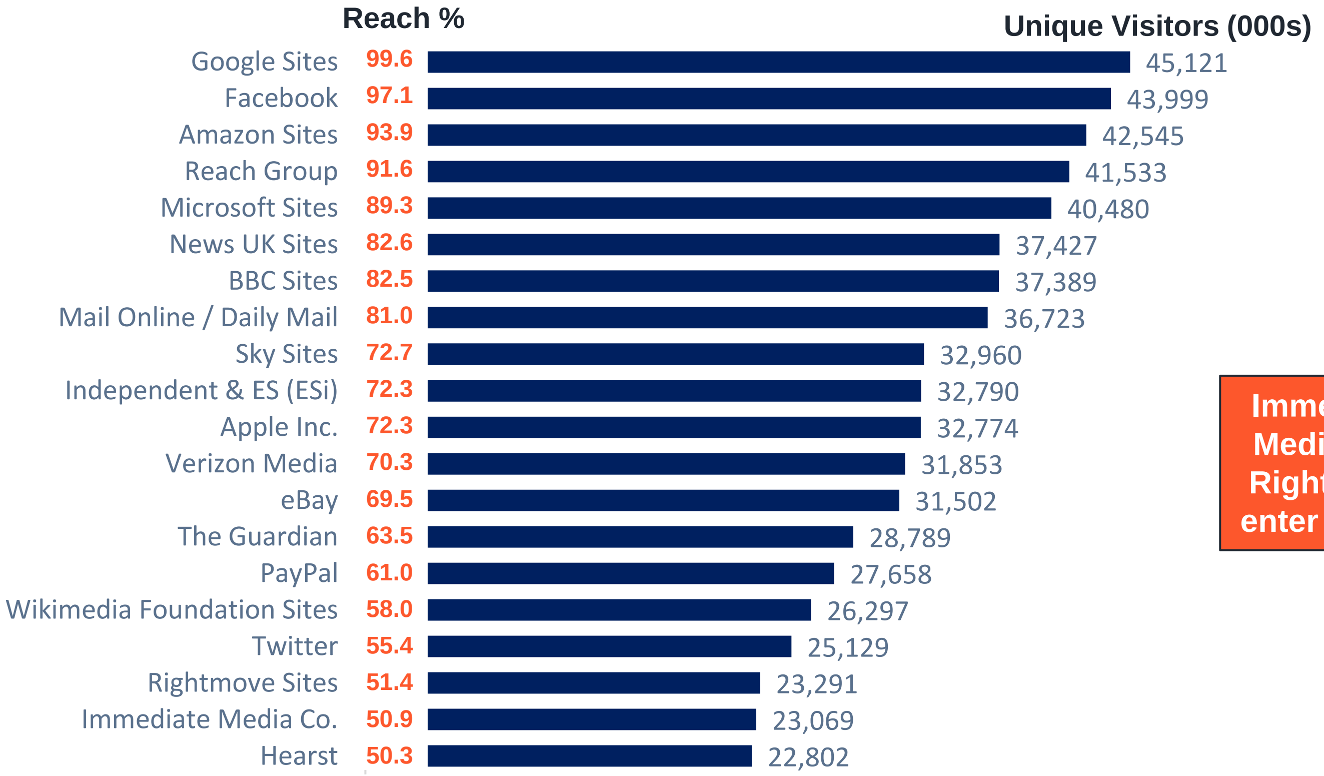
Top Properties & Apps



Top 20 properties by unique visitors

The top 20 properties each reach at least 50% of the adult UK online population



Immediate Media and Rightmove enter top 20

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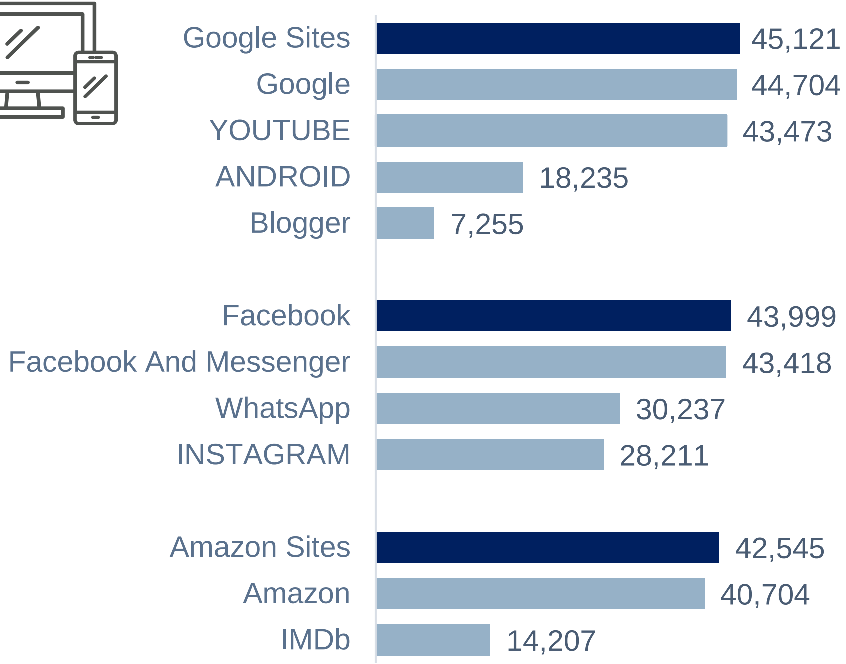
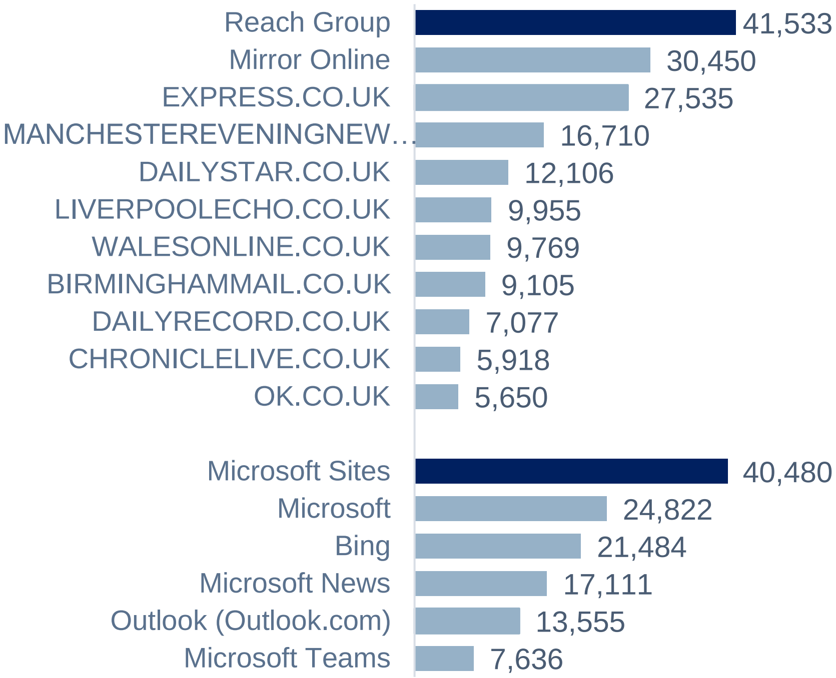
Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2020, UK. MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Due to a tagging issue, [P] Telegraph Media Group was under-reported in June 2020 for Media Metrix, Mobile Metrix, and Media Metrix Multi-Platform data so may not feature in the Top 20.

Audience split* of top 5 sites – unique visitors (000s)





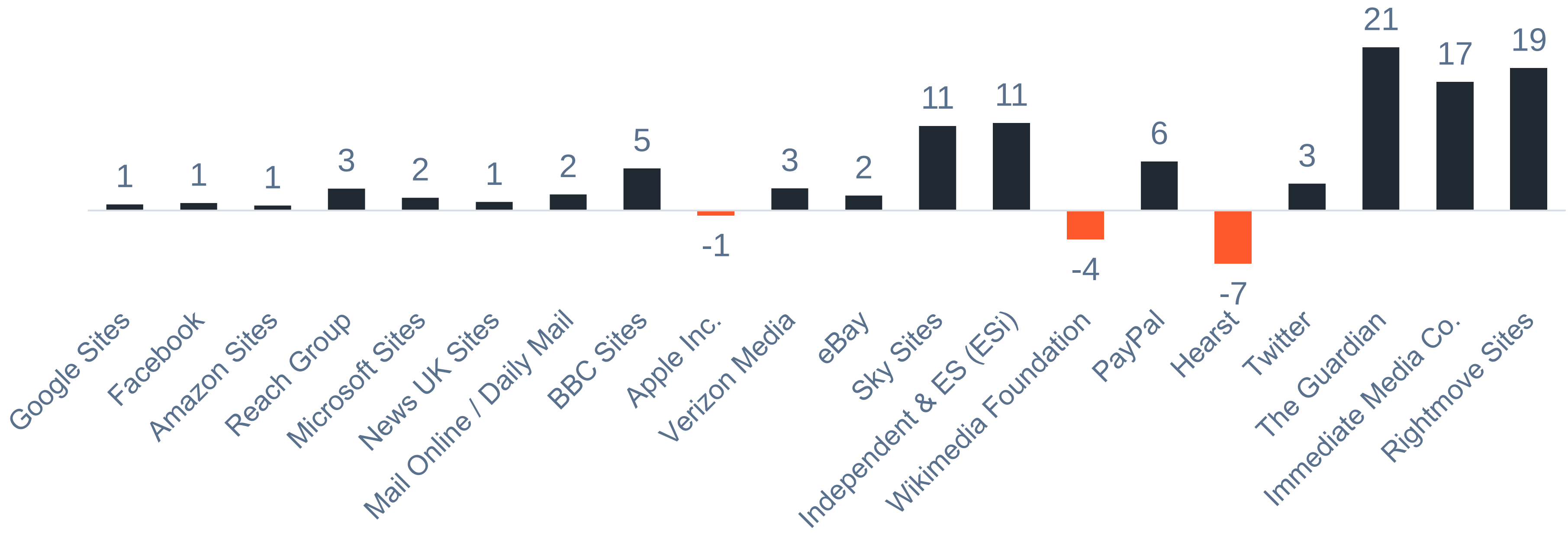
Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2020, UK

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

*Media Titles with >5m unique visitors

Top 20 properties: Jan-Jun unique visitor % change

News brands experience double digit growth. Immediate Media & Rightmove enter top 20

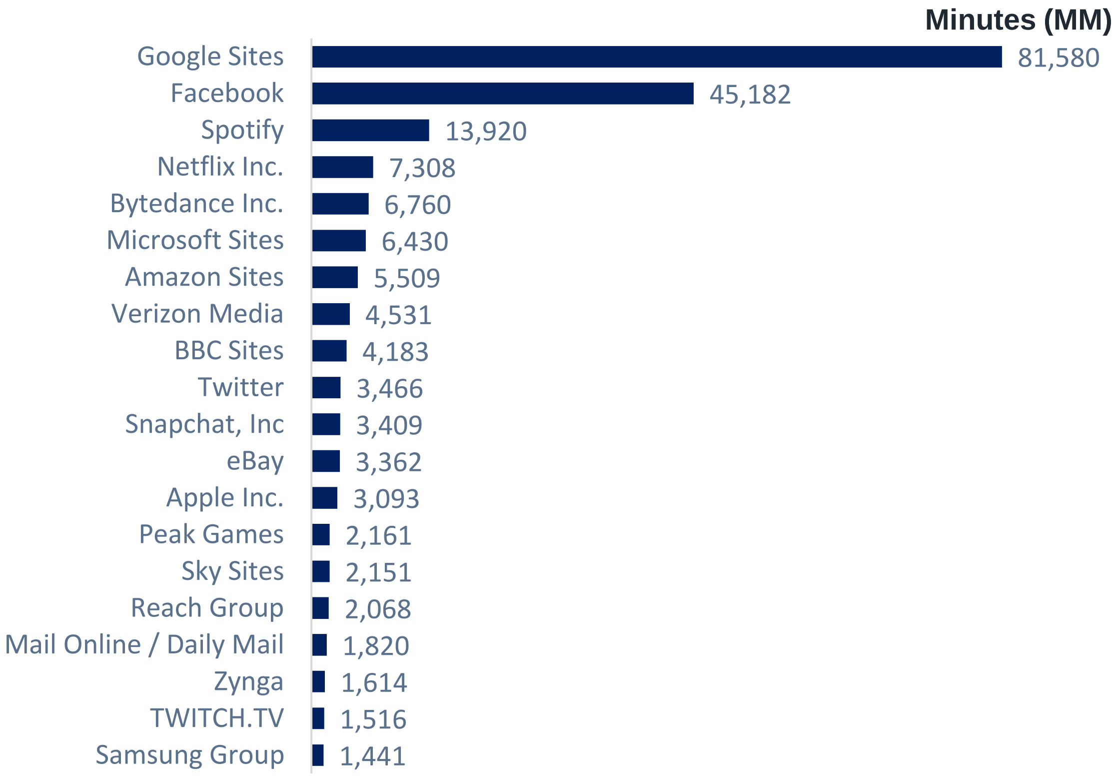


Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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

Top 20 properties by total minutes

Bytedance, owner of TikTok now features in the Top 10



Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2020, UK

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Share of minutes by platform for top 10 'time' properties

Platform split varies among the Top 10 - Video viewing drives high tablet share

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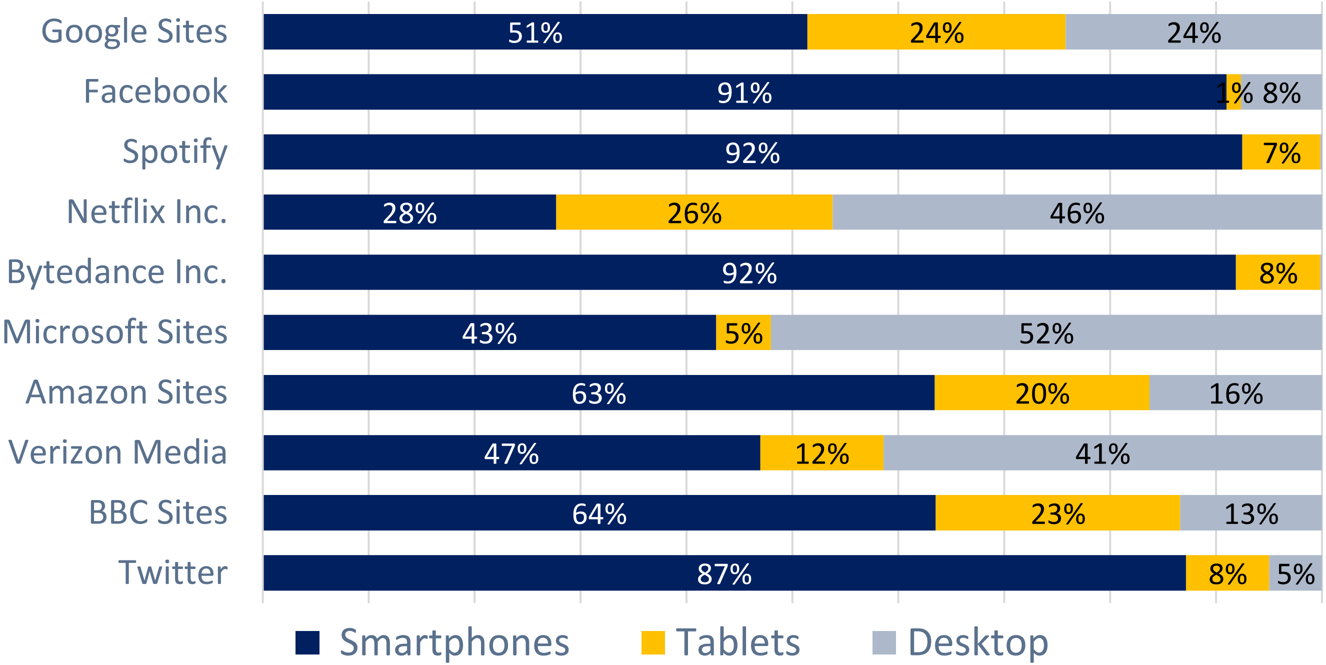


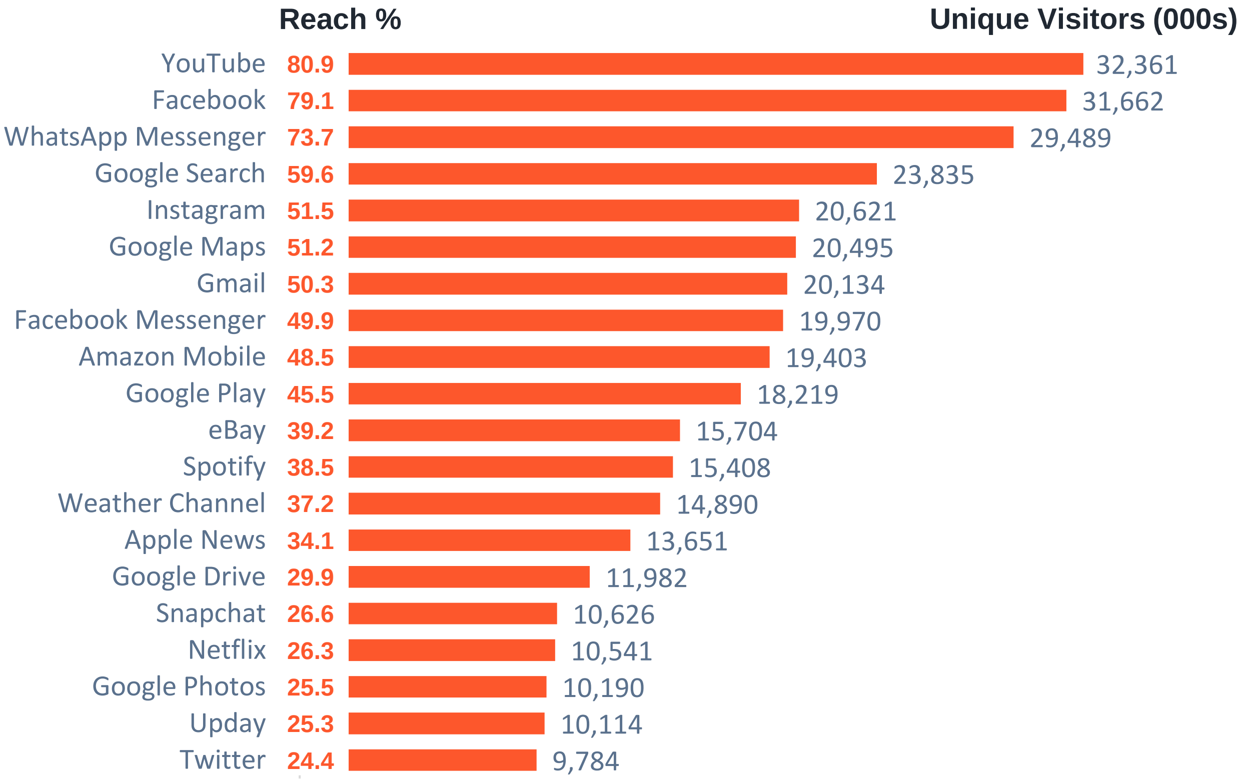
comscore

Source: Comscore MMX Multi-Platform, Adults 18+, June 2020, UK

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

Top 20 mobile* apps by unique visitors

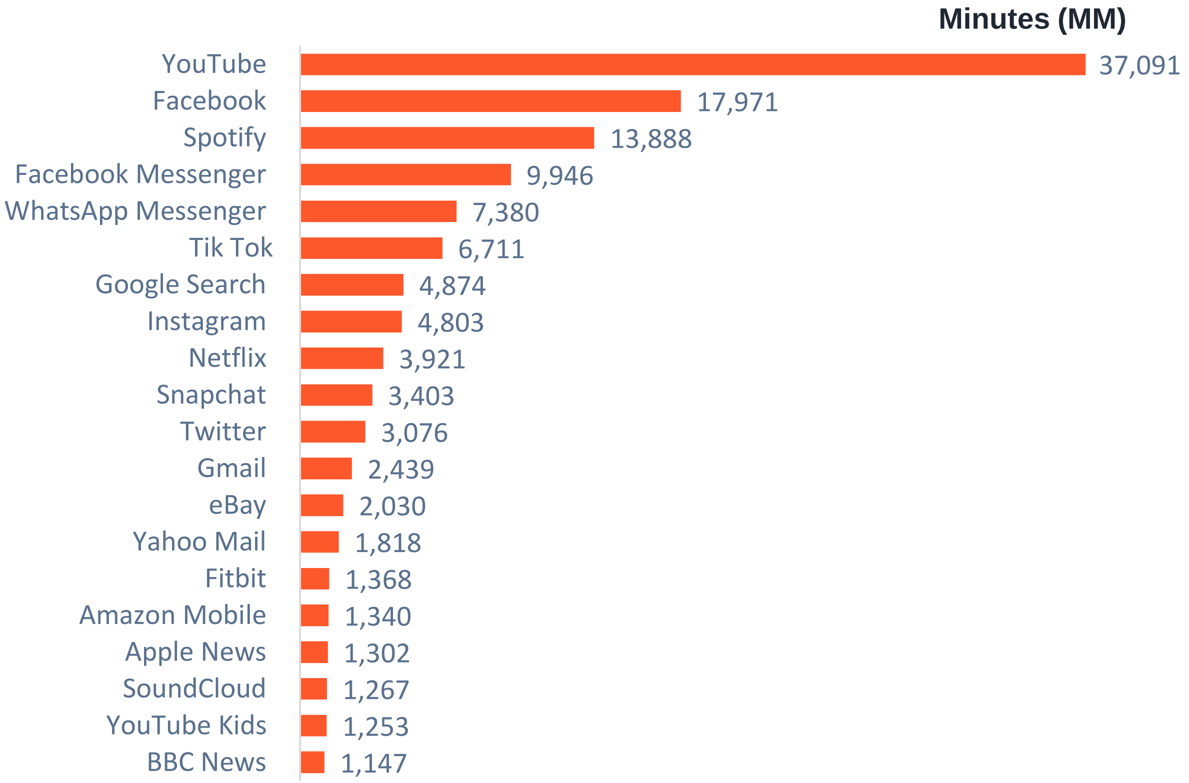
Facebook or Google own 9 of the top 10 mobile apps



Source: Comscore Mobile Metrix, Age 18+. June 2020, UK
'Mobile' includes smartphone and tablet usage combined, **Reach is among all Mobile App users

Top 20 mobile apps by total minutes

TikTok, Spotify, Netflix and Snapchat are in the top 10 for app time

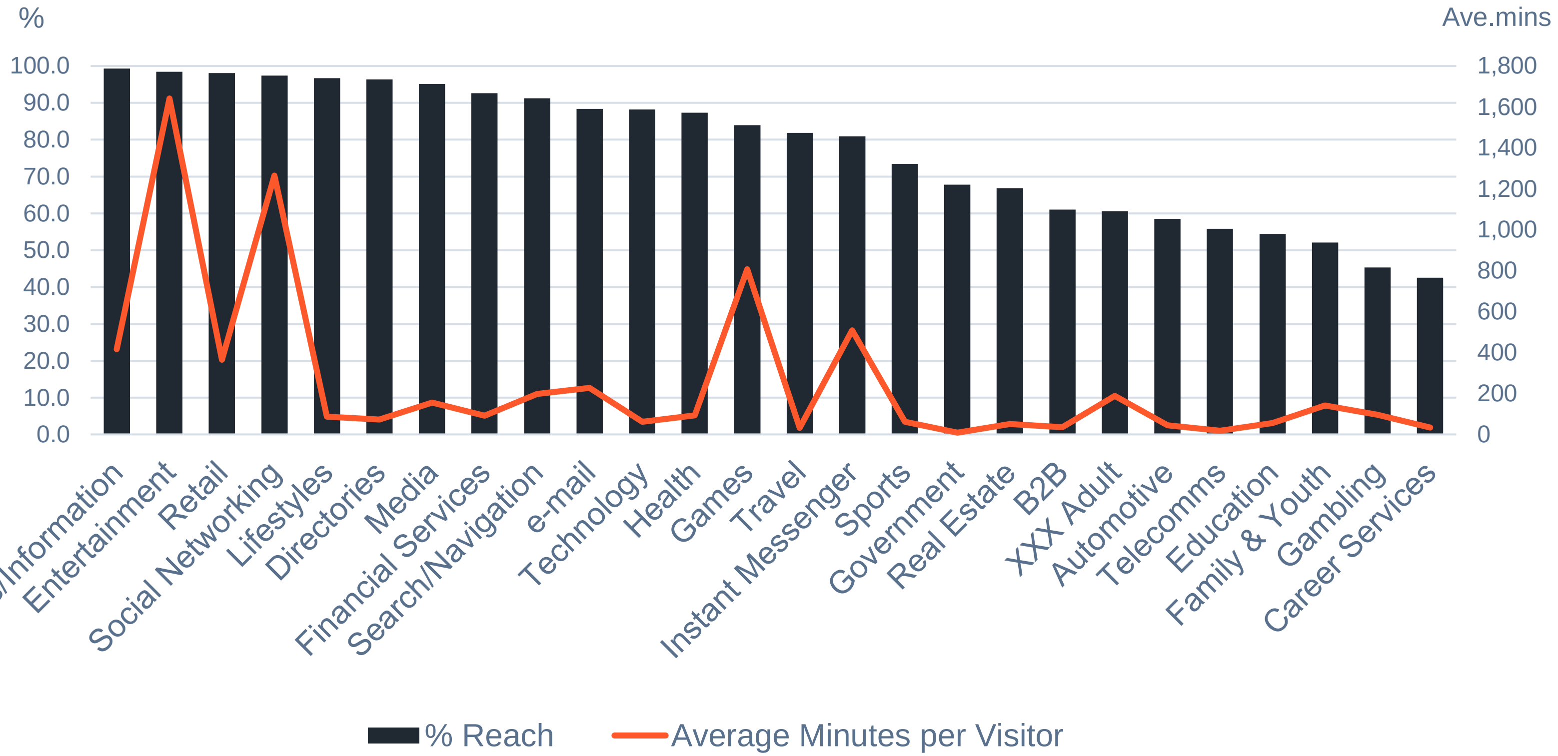


Source: Comscore Mobile Metrix, Age 18+. June 2020, UK
'Mobile' includes smartphone and tablet usage combined

Category usage

Monthly reach and average minutes/visitor by category

Entertainment, Social Networking, Games and IM have high engagement



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Source: Comscore Mobile Metrix, Age 18+. June 2020, UK
'Mobile' includes smartphone and tablet usage combined

Platform share of time online by category

Platform time is influenced heavily by content and service

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Desktop total 19%		Smartphone total 67%		Tablet total 14%	
Computer Software	92%	Instant Messenger	99%	Kids	35%
Education – Training	90%	Car Transportation	96%	Family & Youth	30%
Education – Information	77%	Job Search	96%	Entertainment	25%
Auctions	73%	Gay/Lesbian	96%	Forums/Message Boards	25%
Family & Youth Education	71%	Diet & Exercise/Fitness Tracker	93%	Games	23%
Gaming Information	61%	Coupons/Incentives	92%	XXX Adult	22%
Autos Manufacturer	61%	Consumer Electronics	91%	Search/Navigation	21%
Autos Information/Resources	59%	Health	91%	General News	18%
Automotive – Total	56%	Social Media	91%	Online Gaming	18%
Retail - Music	55%	Payments	91%	Department Stores/Malls	17%
Entertainment - Movies	50%	Maps/GPS/Traffic	90%	Books	16%
Taxes	50%	Dating	89%	Technology	16%
Investments	49%	Social Networking	88%	News/Information	16%
Family & Parenting	48%	Entertainment - Music	87%	Services	15%
Education - Total	45%	Weather	85%	Hotel/Resort & Home Sharing	14%

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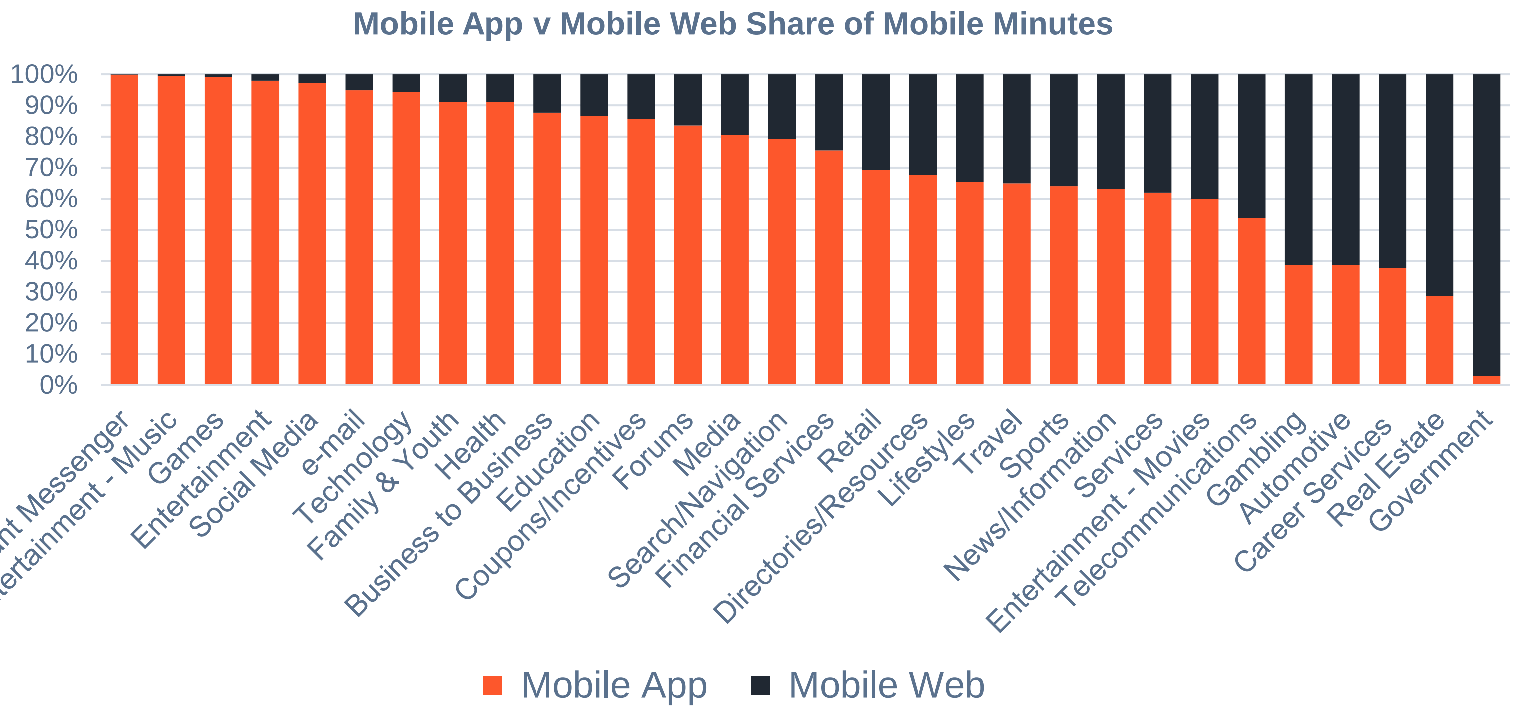
Source: Comscore MMX Multi-Platform, Adults 18+, Jun 2020, UK

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

Share of mobile minutes by access type by category

Mobile App share of minutes varies by content & service



Source: Comscore Mobile Metrix, Age 18+. June 2020, UK
'Mobile' includes smartphone and tablet usage combined

Category Change

Key changes: Jan-Jun 2020

Categories adding/losing most unique visitors: Jan-Jun

8 of the top 10 'decline' categories are travel related

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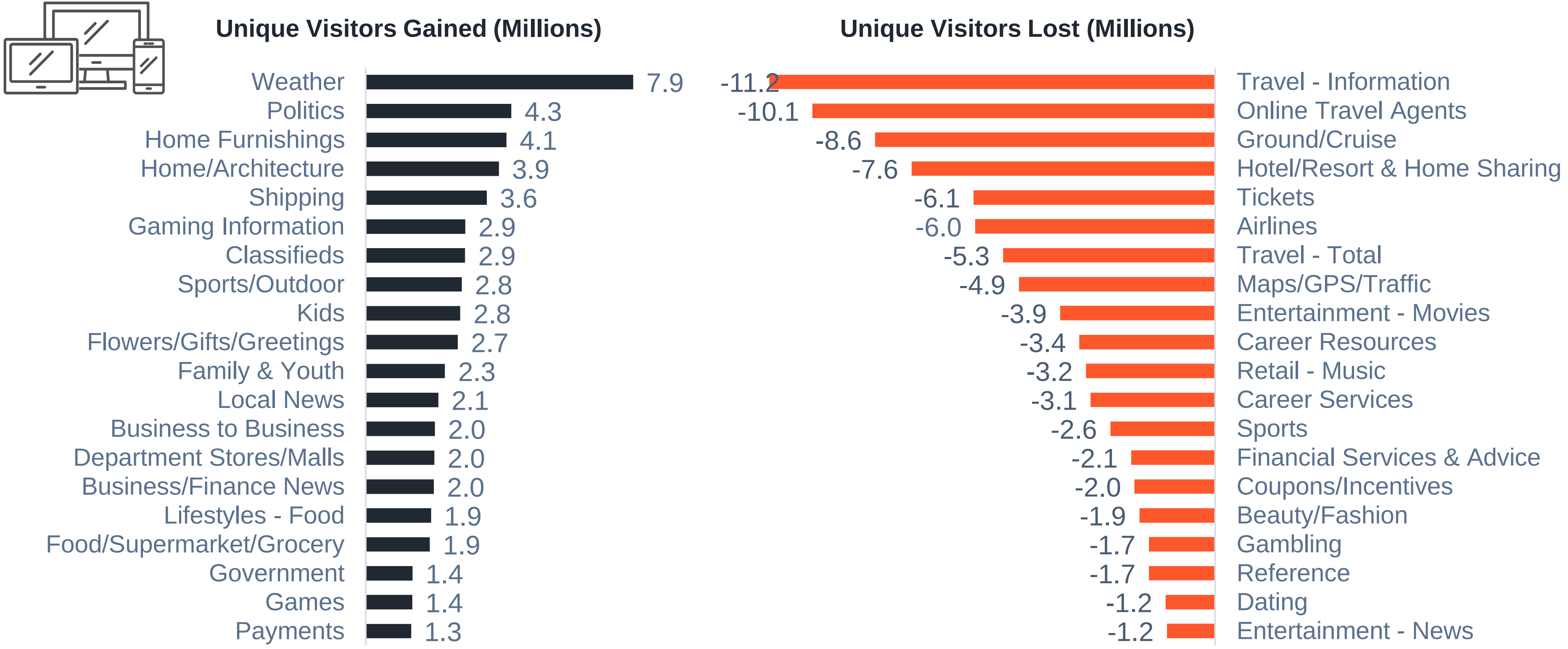

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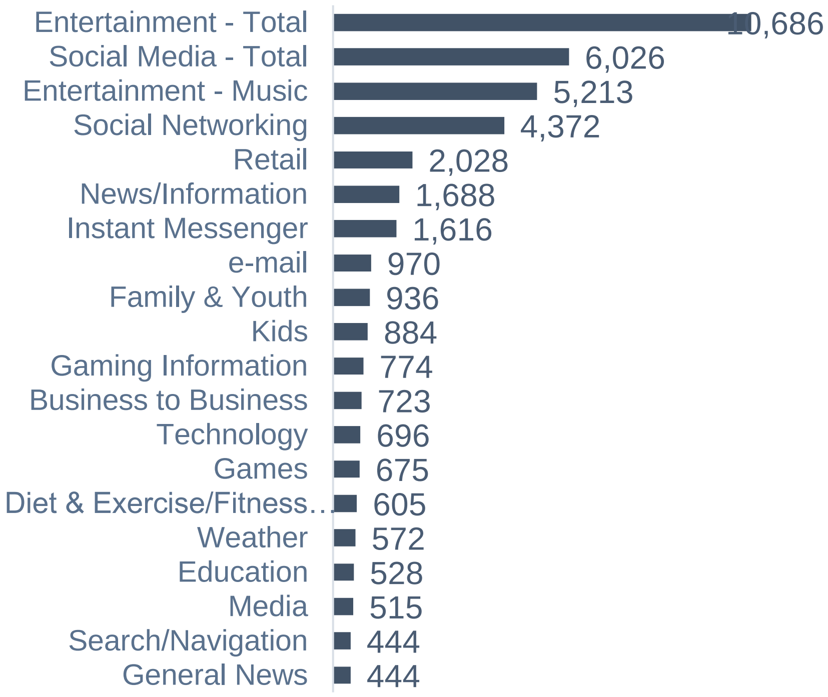
Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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

Categories adding/losing most minutes : Jan-Jun 20

Entertainment, social media, news and retail added most time

Minutes Gained (Millions)



Minutes Lost (Millions)

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

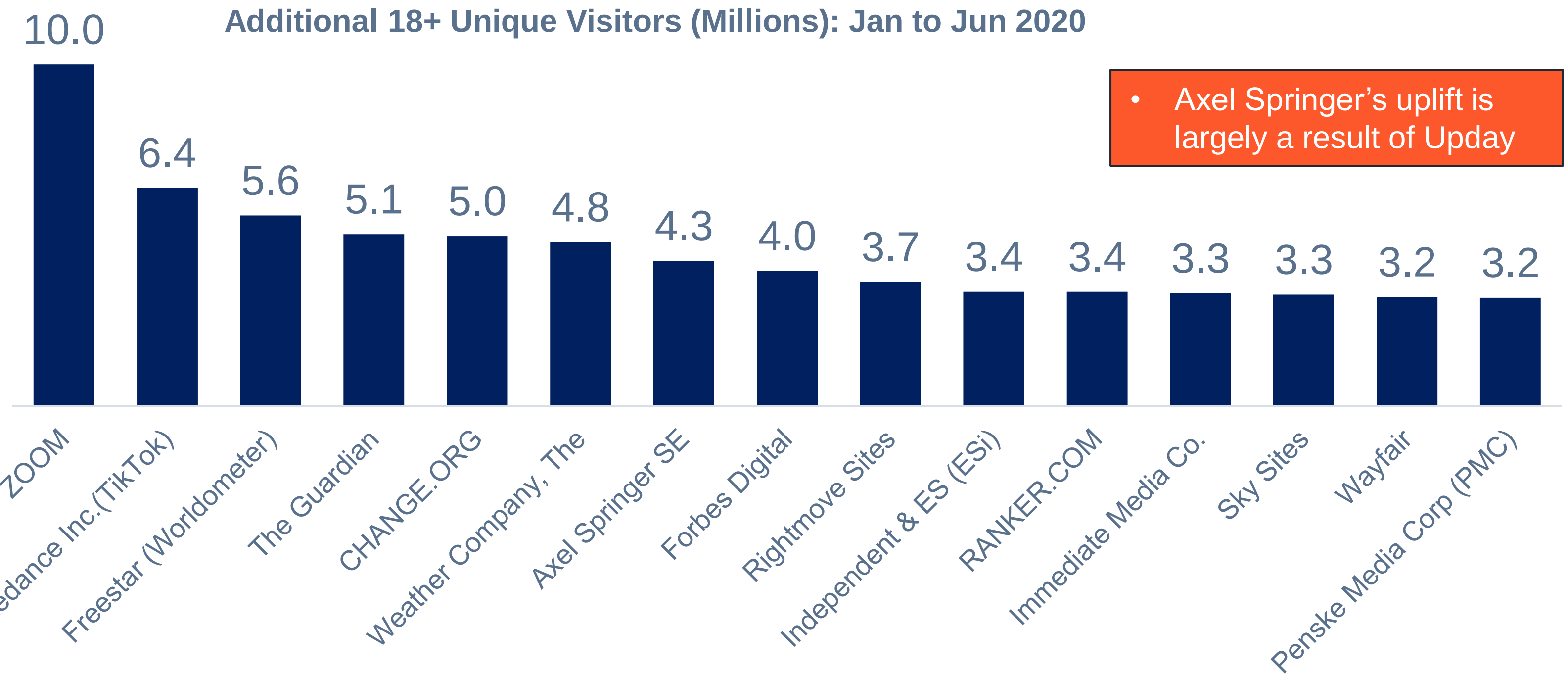
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Top Growth Properties & Mobile Apps

Jan-Jun 2020

Properties adding MOST visitors: Jan-Jun 20

Zoom and Tik Tok have witnessed big uplifts in the last 6 months



- Axel Springer's uplift is largely a result of Upday

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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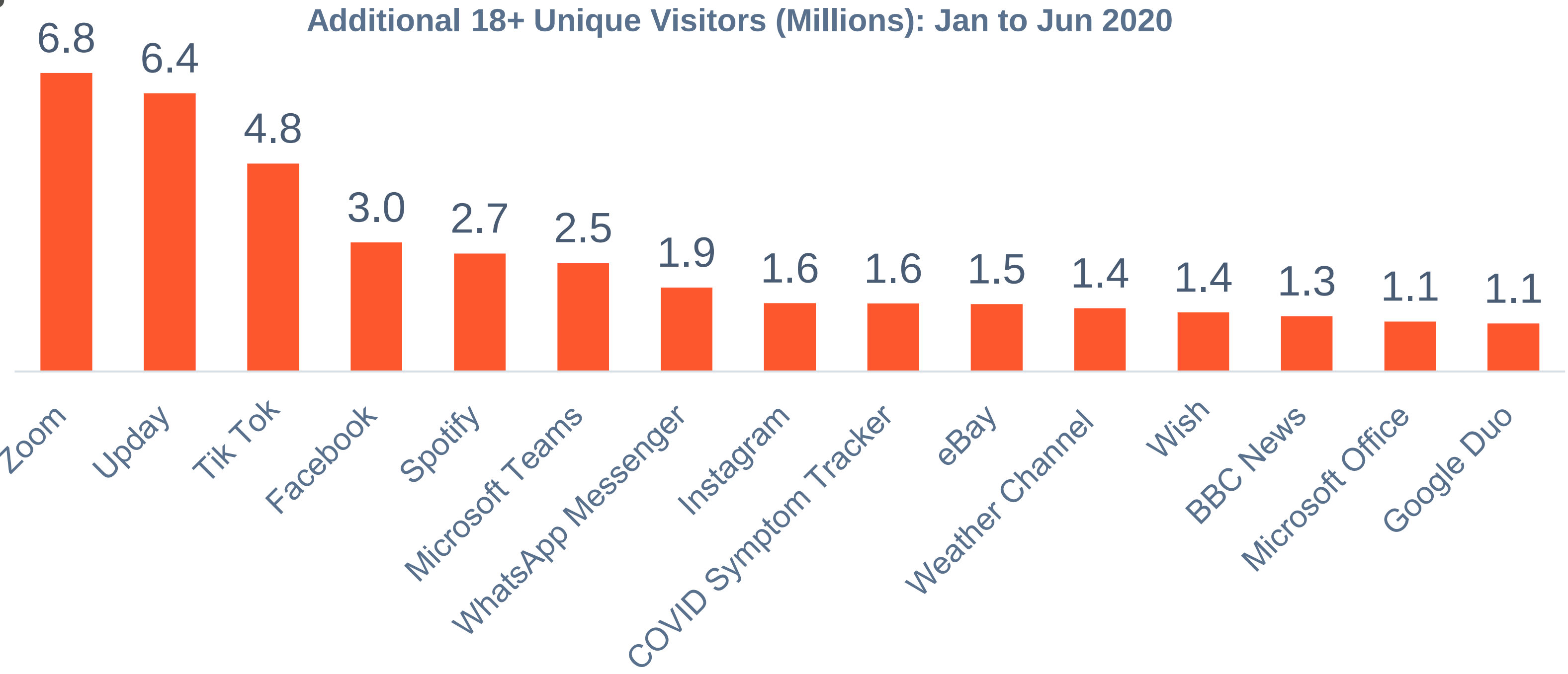
Mobile apps adding MOST visitors: Jan-Jun 20



comscore

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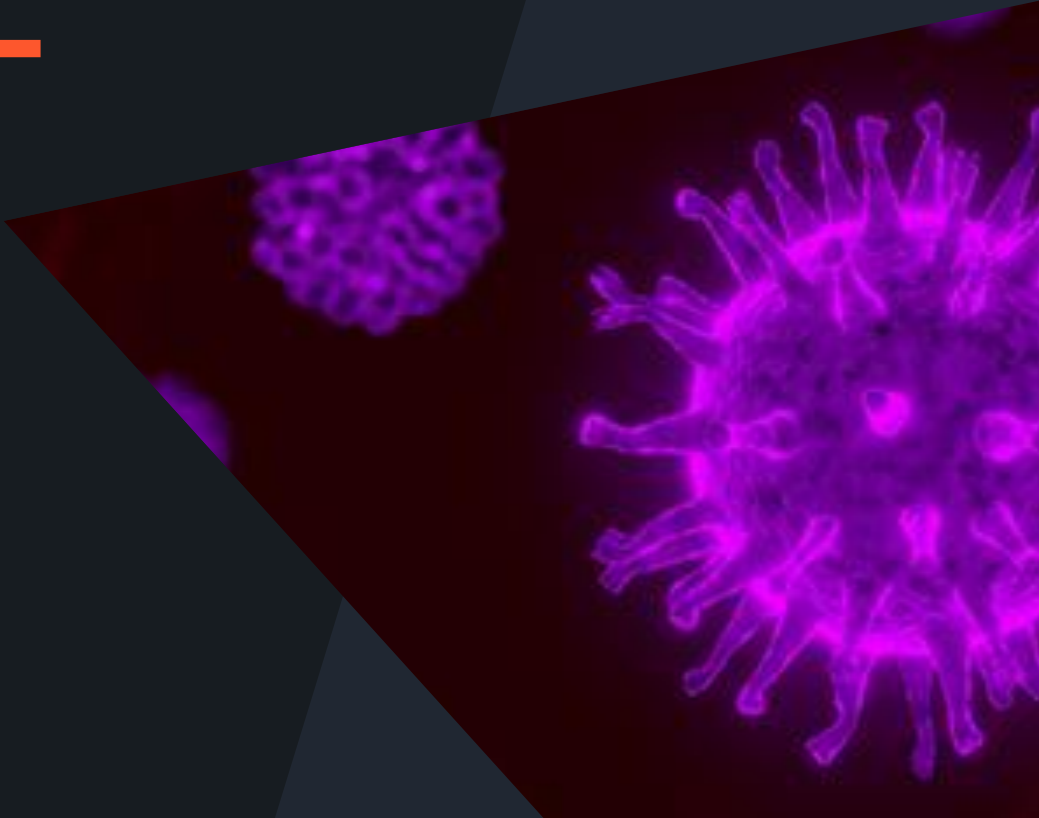
Impact of Covid-19 on UK online Usage

June update



Categories which experienced growth during the covid lockdown months of March and April

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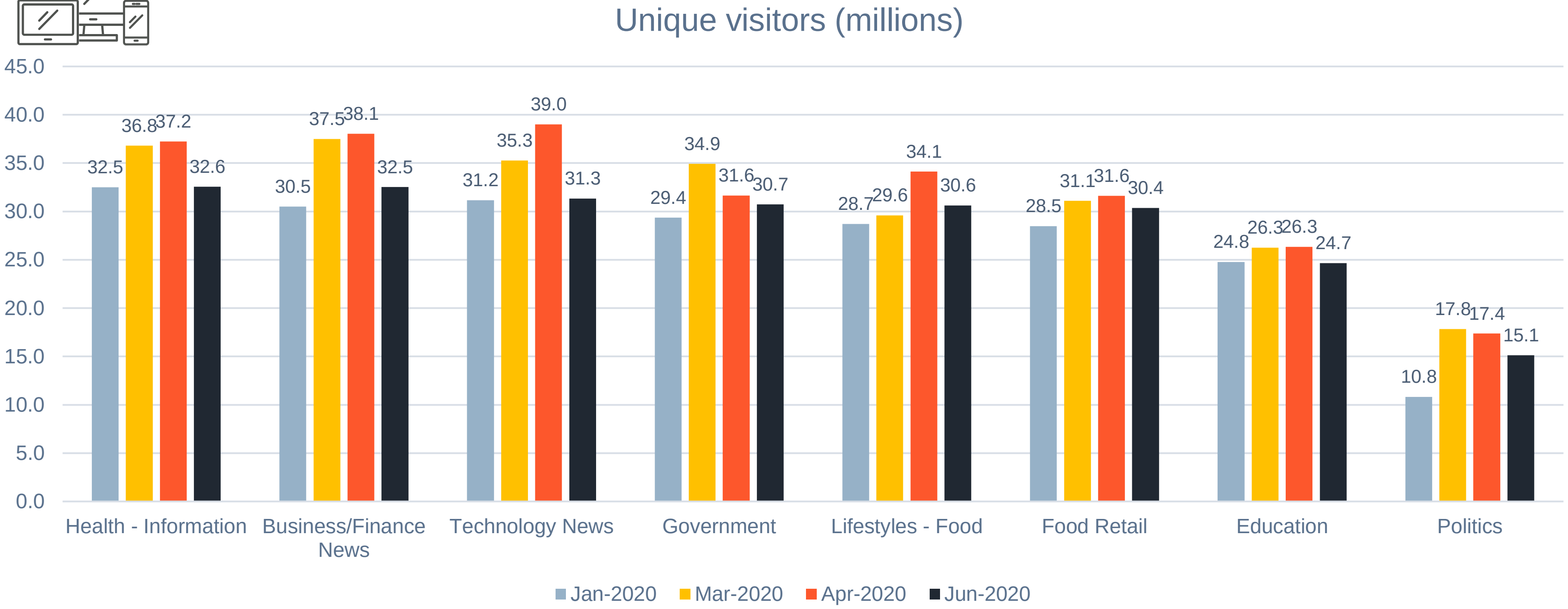
* Growth in either unique visitors, minutes or both

Unique visitor change for 'covid growth' categories

Categories which gained visitors during March and April have recently declined



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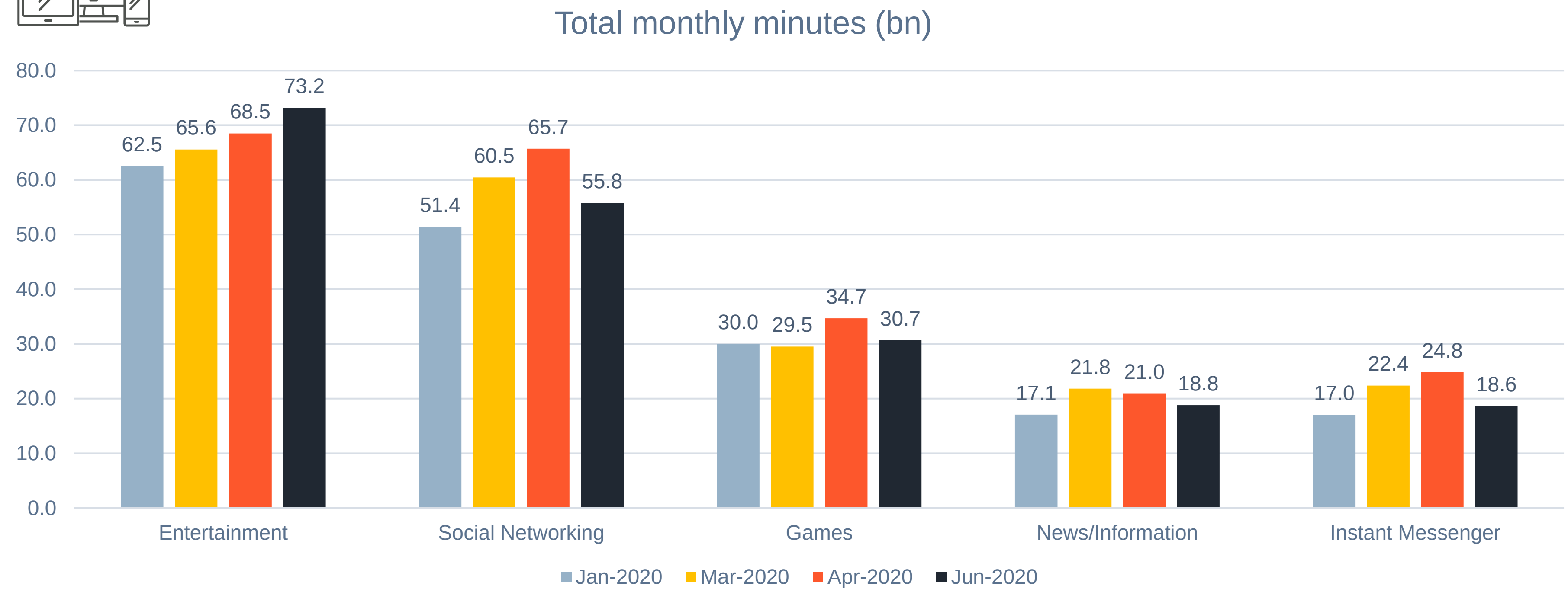
Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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

Minutes trend for 'covid time growth' categories

Time has gone down for many categories which experienced big increases in March and April



	Jan-2020	Mar-2020	Apr-2020	Jun-2020
Entertainment	62.5	65.6	68.5	73.2
Social Networking	51.4	60.5	65.7	55.8
Games	30.0	29.5	34.7	30.7
News/Information	17.1	21.8	21.0	18.8
Instant Messenger	17.0	22.4	24.8	18.6

comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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Categories which experienced declines* during the covid lockdown months of March and April

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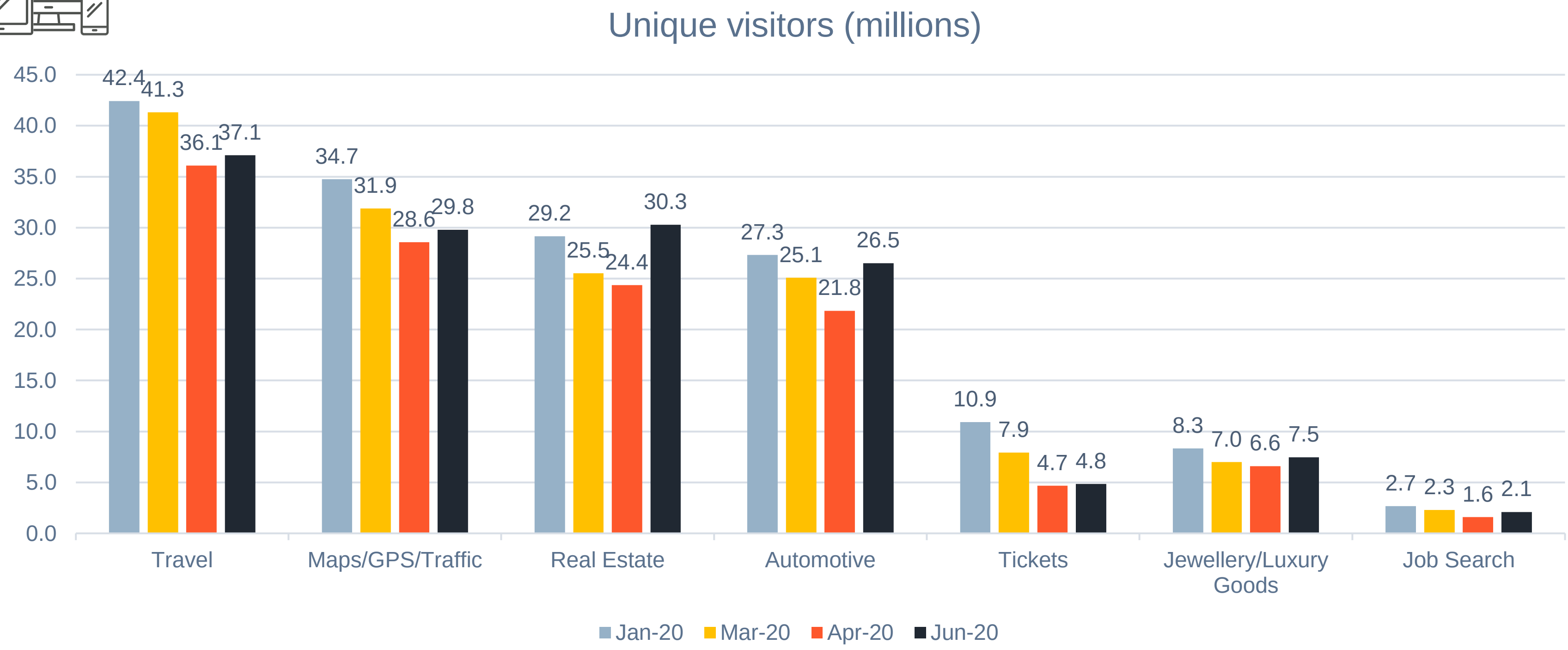
* Decline in either unique visitors, minutes or both

Unique visitor trend for ‘covid decline’ categories

Hardest hit sectors in March and April are showing signs of recovery



comscore

Source: Comscore MMX Multi-Platform, Adults 18+, Jan-Jun 2020, UK

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Minutes trend for ‘covid time decline’ categories

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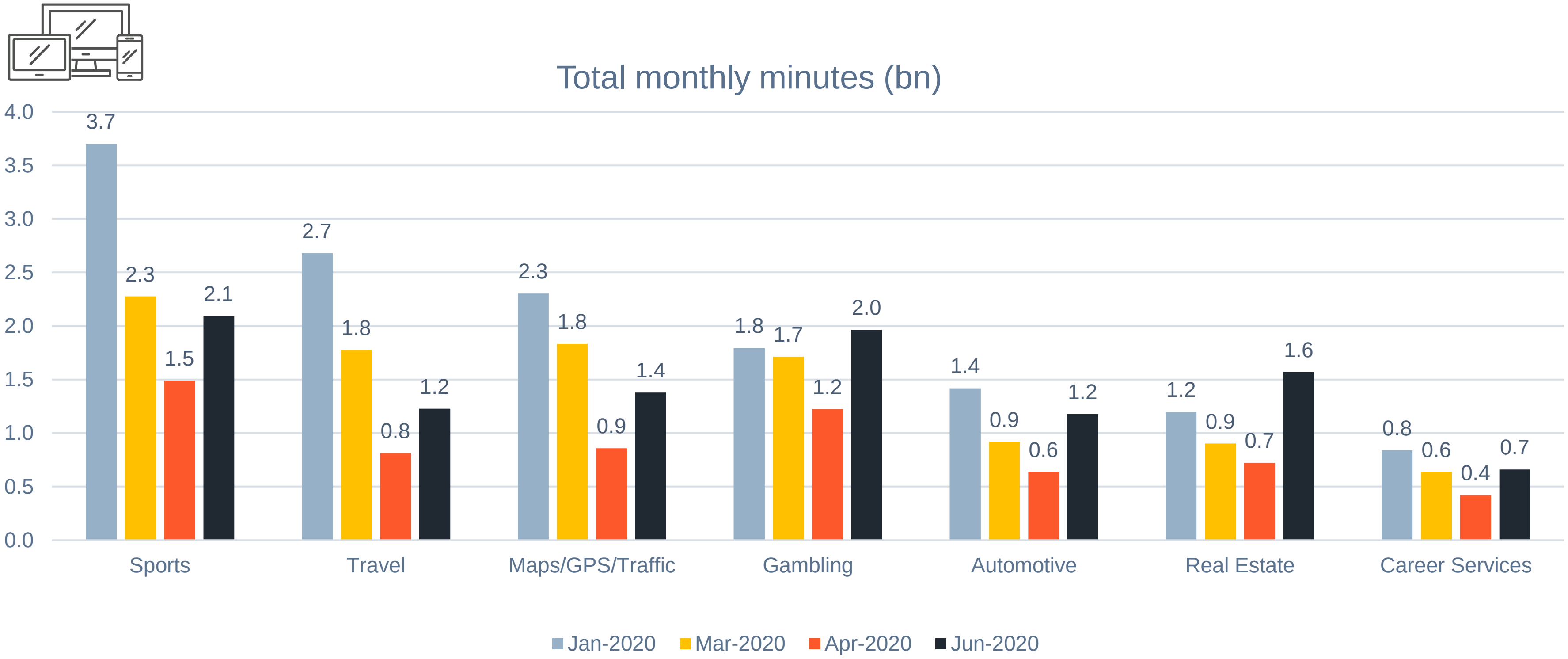
Sports starting to recover as live sport begins again in June



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Questions?

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

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.

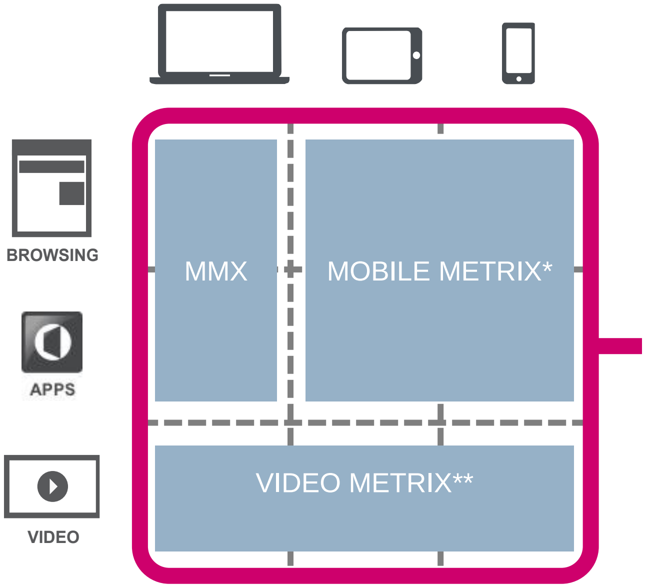
The whole UK media industry is involved in setting and overseeing UKOM standards through its Technical and Commercial Committees, and the UKOM Board.

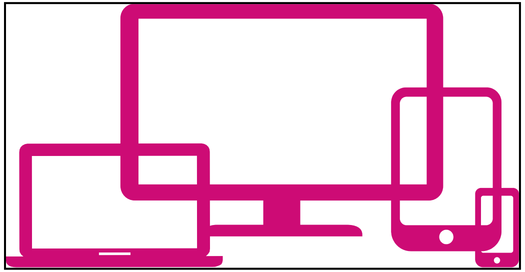
UKOM and Comscore work to an agreed process for product approval, from agreeing concepts, to approved data publication, and continuous assessment.

Find out more at:
www.ukom.uk.net/

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**

**MMX Multi-Platform does not yet include mobile and tablet video. This is separately available in VMX-MP