### UKOM

# Digital Market Overview

June 2020

### **The UK Digital Market Overview Jun 2020**

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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



29.06.2020

### **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

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### Platform unique visitors by age (000s)

Smartphone use is the most popular platform across all age groups





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

### 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

28% Females: 18+ 38% Children:No 30% Children:Yes 39% 16% 22% 34% 37% 46% 54%

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

### **Time online**



### Total minutes online: Jun 19 - Jun 20

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



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

### 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



■ Jan-20 ■ Apr-20 ■ Jun-20



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



# By platform

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

Share of minutes by platform

Desktop, Tablet, 14% 19% 7 -Smartphone, 67%

### By access type





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



### **Platform share of minutes by demographics**

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





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



### Average minutes per visit by platform

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



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

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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



Desktop Mobile

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

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

### **Top Properties & Apps**



### **Top 20 properties by unique visitors**

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







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)



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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.

\*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

### **Top 20 properties by total minutes**

Bytedance, owner of TikTok now features in the Top 10



Minutes (MM)



Google Sites			81,580
Facebook		45,182	
Spotify	13,920		
Netflix Inc.	7,308		
Bytedance Inc.	6,760		
Microsoft Sites	6,430		
Amazon Sites	5,509		
Verizon Media	4,531		
BBC Sites	4,183		
Twitter	3,466		
Snapchat, Inc	3,409		
eBay	3,362		
Apple Inc.	3,093		
Peak Games	2,161		
Sky Sites	2,151		
Reach Group	2,068		
Mail Online / Daily Mail	<b>1</b> ,820		
Zynga	1,614		
TWITCH.TV	1,516		
Samsung Group	1,441		



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

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

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





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

### Top 20 mobile\* apps by unique visitors

Reach %

#### Facebook or Google own 9 of the top 10 mobile apps





			5,0000
YouTube	80.9	32,	361
Facebook	79.1	31,6	62
WhatsApp Messenger	73.7	29,489	
Google Search	59.6	23,835	
Instagram	51.5	20,621	
Google Maps	51.2	20,495	
Gmail	50.3	20,134	
Facebook Messenger		19,970	
Amazon Mobile	48.5	19,403	
Google Play	45.5	18,219	
eBay	39.2	15,704	
Spotify		15,408	
Weather Channel	37.2	14,890	
Apple News		13,651	
Google Drive		11,982	
Snapchat		10,626	
Netflix		10,541	
Google Photos		10,190	
Upday		10,114	
Twitter	24.4	9,784	





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



Minutes (MM)



YouTube		37,091
Facebook	17,971	07,001
Spotify	13,888	
Facebook Messenger	9,946	
WhatsApp Messenger	7,380	
Tik Tok	6,711	
Google Search	4,874	
Instagram	4,803	
Netflix	3,921	
Snapchat	3,403	
Twitter	3,076	
Gmail	2,439	
eBay	2,030	
Yahoo Mail	1,818	
Fitbit	1,368	
Amazon Mobile	1,340	
Apple News	1,302	
SoundCloud	1,267	
YouTube Kids	1,253	
BBC News	1,147	



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



% Reach

Average Minutes per Visitor



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



Computer Software	92%
Education – Training	90%
Education – Information	77%
Auctions	73%
Family & Youth Education	71%
Gaming Information	61%
Autos Manufacturer	61%
Autos Information/Resources	59%
Automotive – Total	56%
Retail - Music	55%
Entertainment - Movies	50%
Taxes	50%
Investments	49%
Family & Parenting	48%
Education - Total	45%





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•	Instant Messenger	99%
•	Car Transportation	96%
•	Job Search	96%
•	Gay/Lesbian	96%
•	Diet & Exercise/Fitness Tracker	93%
•	Coupons/Incentives	92%
•	Consumer Electronics	91%
•	Health	91%
•	Social Media	91%
•	Payments	91%
•	Maps/GPS/Traffic	90%
•	Dating	89%
•	Social Networking	88%
•	Entertainment - Music	87%
•	Weather	85%



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Kids	35%
Family & Youth	30%
Entertainment	25%
Forums/Message Boards	25%
Games	23%
XXX Adult	22%
Search/Navigation	21%
General News	18%
Online Gaming	18%
Department Stores/Malls	17%
Books	16%
Technology	16%
News/Information	16%
Services	15%
Hotel/Resort & Home Sharing	14%



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

### Share of mobile minutes by access type by category



Mobile App share of minutes varies by content & service





Mobile App





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**

-11.2

-10.1

7.9

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





_		rrodanor	
		Politics	
	Home	Furnishings	
	Home/	Architecture	
		Shipping	
	Gaming	Information	
	0	Classifieds	
	Spo	orts/Outdoor	
		Kids	
	Flowers/Gift	ts/Greetings	
		nily & Youth	
		Local News	
	Business	to Business	
	Department S	Stores/Malls	
	Business/Fir		
	Lifes	tyles - Food	
Fo	od/Supermar	*	
	. (	Government	
		Games	
		Payments	

**Unique Visitors Gained (Millions)** 

Weather	
Politics	4.3
rnishings	4.1
hitecture	3.9
Shipping	3.6
ormation	2.9
assifieds	2.9
/Outdoor	2.8
Kids	2.8
Greetings	2.7
& Youth	2.3
cal News	2.1
Business	2.0
res/Malls	2.0
ce News	2.0
es - Food	1.9
/Grocery	1.9
/ernment	1.4
Games	1.4
ayments	1.3

**Unique Visitors Lost (Millions)** 

Travel - Information **Online Travel Agents** -8.6 Ground/Cruise -7.6 Hotel/Resort & Home Sharing Tickets -6 1 -6.0 Airlines Travel - Total -5.3 Maps/GPS/Traffic -4.9 -3.9 **Entertainment - Movies** -3.4 **Career Resources** -3.2 Retail - Music -31 Career Services -2.6 Sports -2.1 Financial Services & Advice -2.0 Coupons/Incentives Beauty/Fashion -1.9 -17 Gambling Reference -17 Dating -1.2 -1.2 **Entertainment - News** 



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

### **Categories adding/losing most minutes : Jan-Jun 20**

Entertainment, social media, news and retail added most time





#### Minutes Gained (Millions)



#### Minutes Lost (Millions)

-1,607 -1,453 -1,446 -925	Sports Travel Coupons/Incentives Maps/GPS/Traffic
-795 💻	Online Gaming
-754 💻	Directories/Resources
-566 💻	Online Travel Agents
-554 💻	XXX Adult
-515 💻	Dating
-289 📕	Travel - Information
-278 📕	Retail - Music
-253 📕	Ground/Cruise
-240 📕	Automotive
-208	Lifestyles
-184	Hotel/Resort/Home Sharing
-180 🛽	Career Services
-159 🛽	Banking
-158 🛽	Career Resources
-157	Entertainment - Movies
-156	Airlines



### **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







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

### Mobile apps adding MOST visitors: Jan-Jun 20







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

### 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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■ Jan-2020 ■ Mar-2020 ■ Apr-2020 ■ Jun-2020



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

### Minutes trend for 'covid time growth' categories

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

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

# 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

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### **Unique visitor trend for 'covid decline' categories**

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



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■ Jan-20 ■ Mar-20 ■ Apr-20 ■ Jun-20



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

### Minutes trend for 'covid time decline' categories



Sports starting to recover as live sport begins again in June



Jan-2020 Mar-2020 Apr-2020 Jun-2020



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

# **Questions?**

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- Find out more at: <u>http://www.ukom.uk.net/</u>
- 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 <u>www.Comscore.com</u>

#### Stay connected





# **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.

### **UKOM**

Find out more at: <a href="http://www.ukom.uk.net/">www.ukom.uk.net/</a>





