

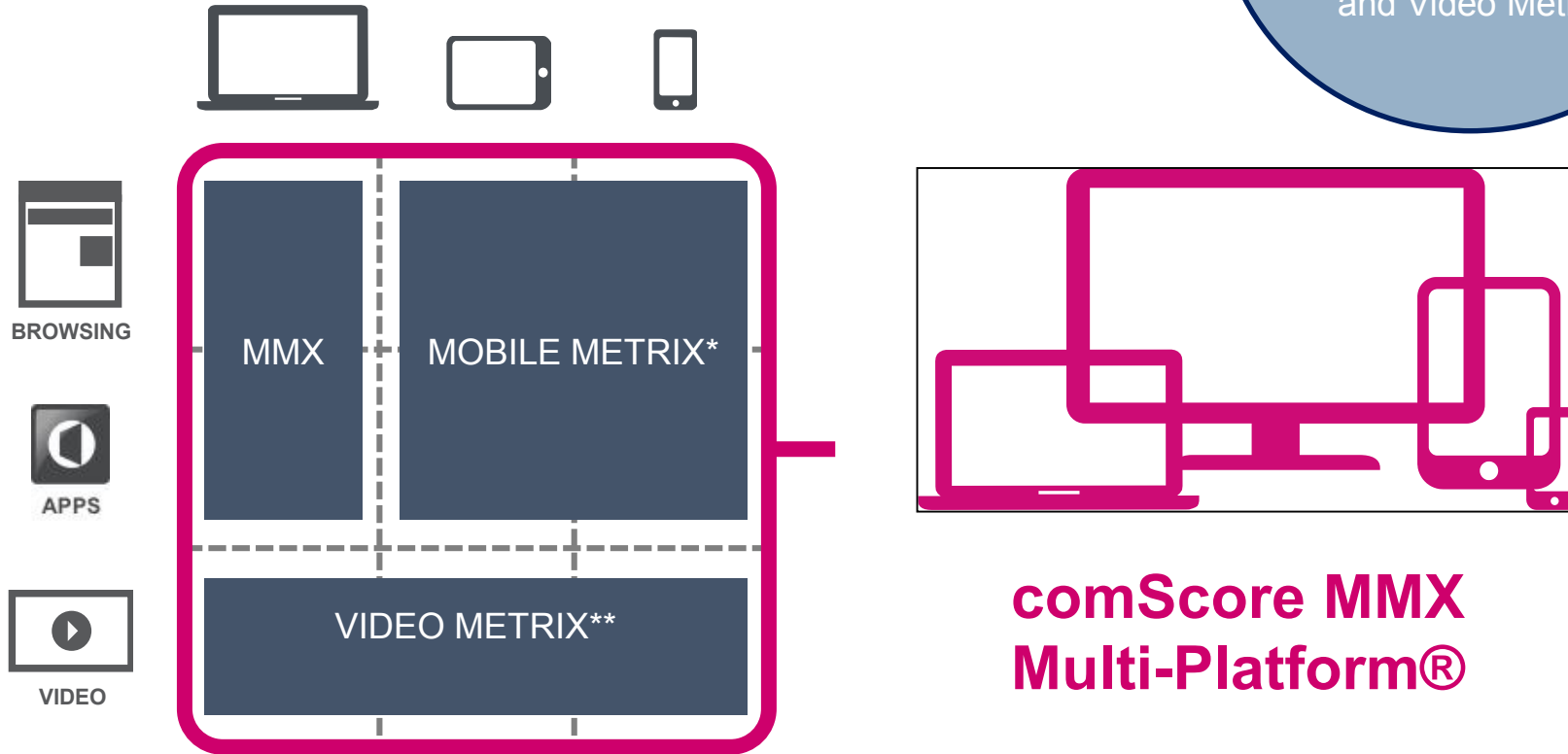
# UK Digital Market Overview – March 2018



If you have any questions, please  
contact: [insights@ukom.uk.net](mailto:insights@ukom.uk.net)

# A Guide to Data Sources

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



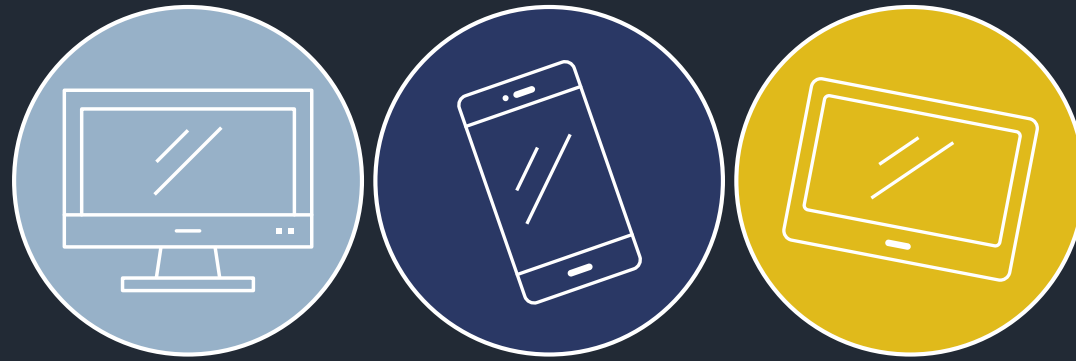
# March 2018 Methodology Update

# 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](#).

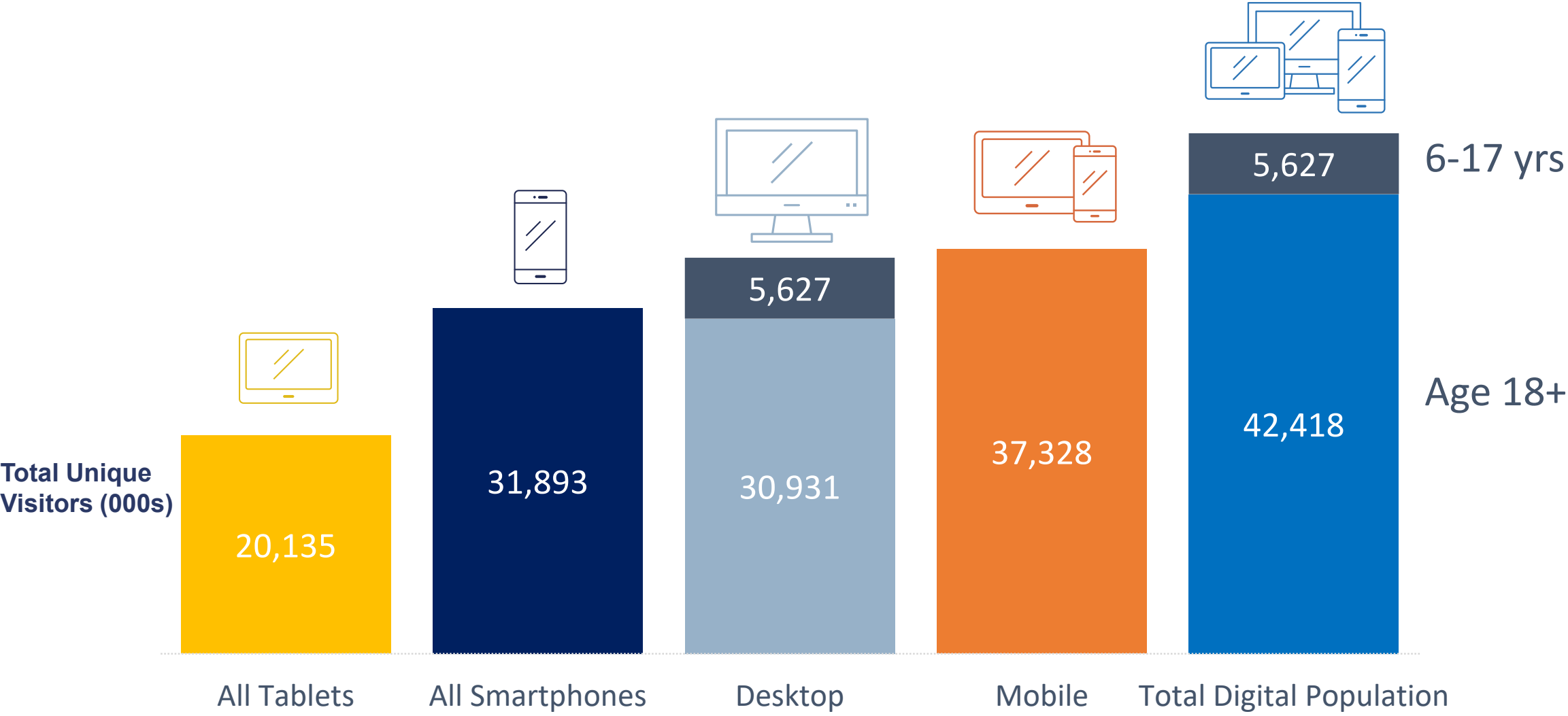
A major UK change is that UKOM has updated the source for UK online universe estimates for all the comScore products that it endorses from the previous National Readership Survey (NRS) to the new PAMCo study by Ipsos MORI. In order to take into account device fragmentation and changes in consumer cross-platform 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](https://mymetrix.comscore.com/app/cmdata/comScore_March_2018_data_enhancements.pdf) for more information.



# Usage by Platform

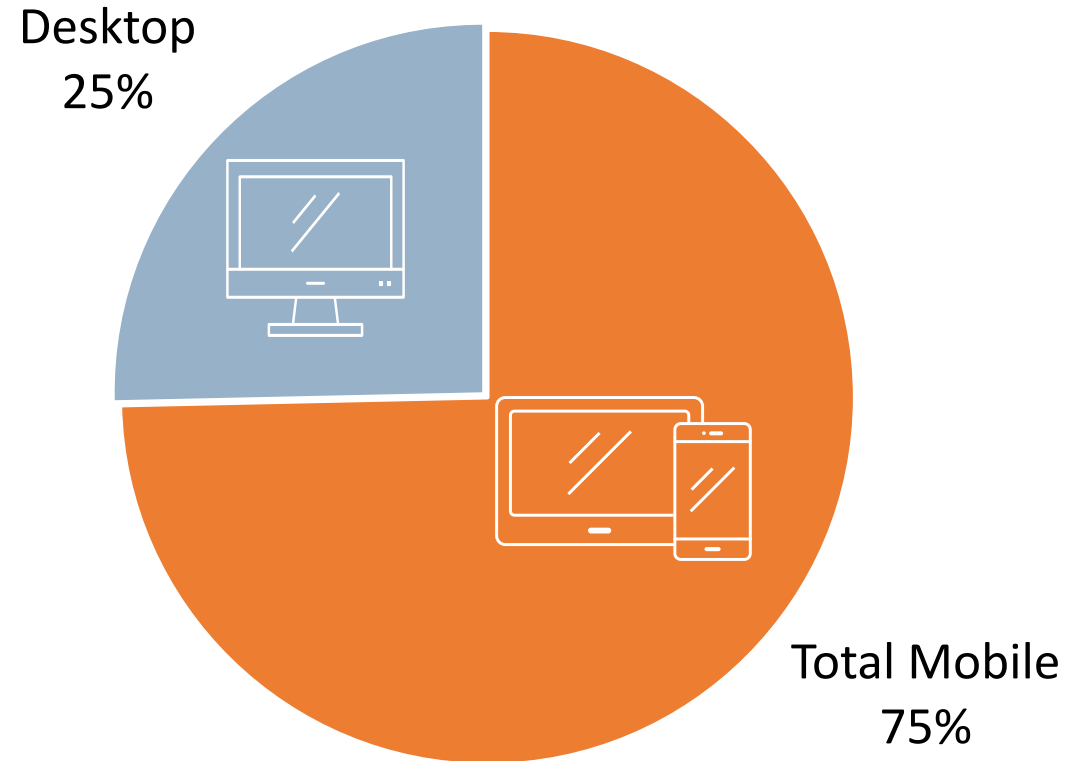
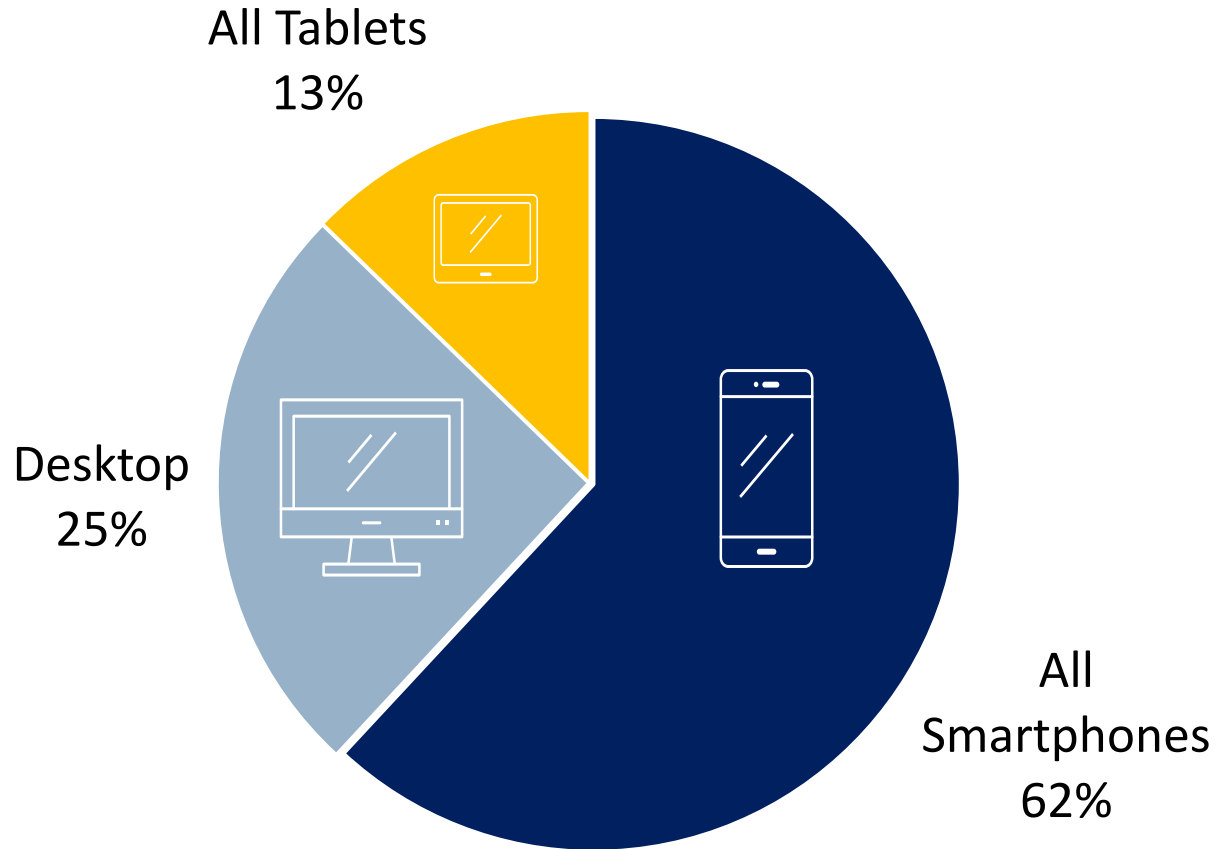
# Breakdown of Digital Unique Visitors by Platform



# Share of Minutes by Platform

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

## Share of Total Minutes 18+

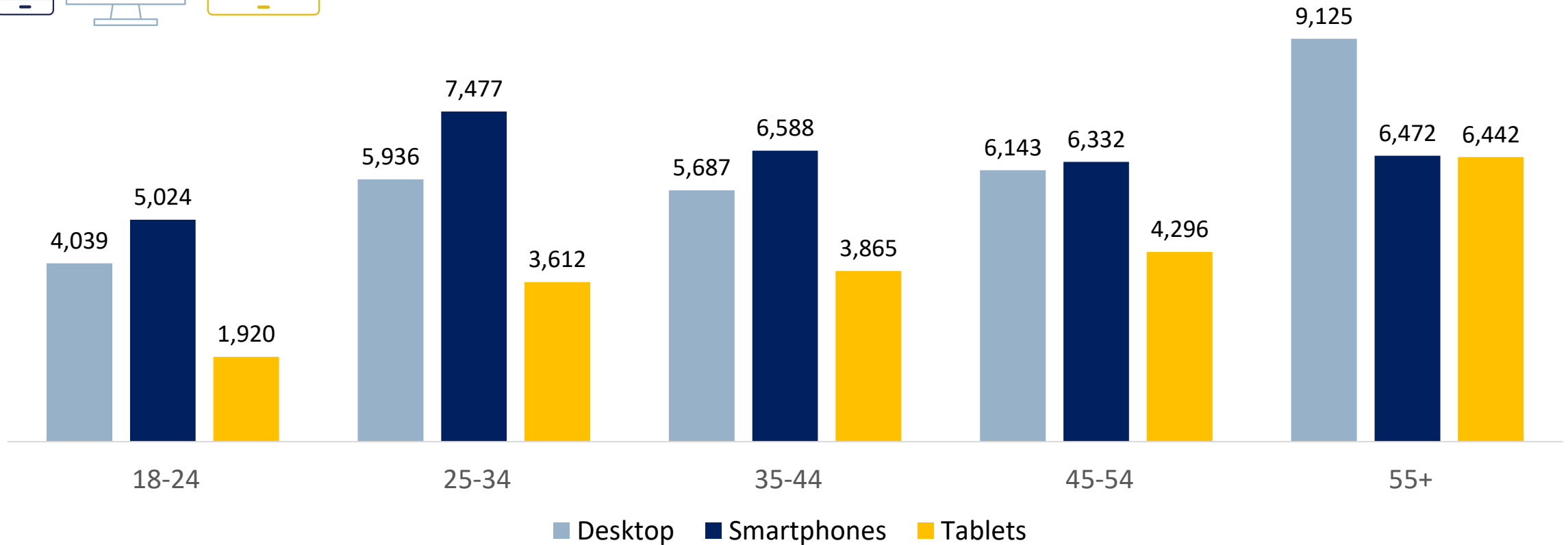


# Platform Unique Visitors by Age

## The Desktop has higher reach amongst Older Audiences



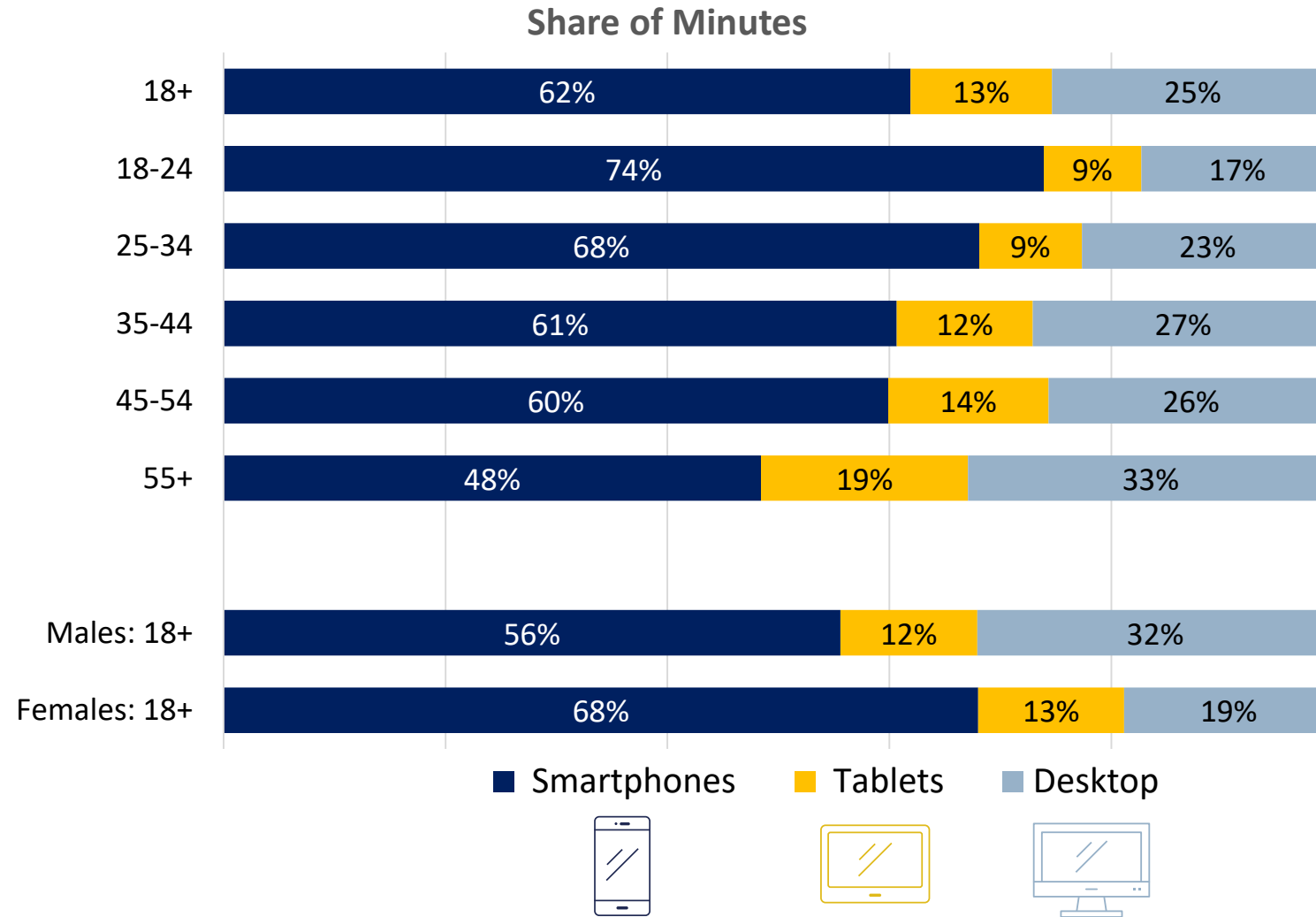
Audience by Platform by Age - Unique Visitors (000s)





# Platform Share of Minutes by Age & Gender

## Millennials & females spend greatest share of time on mobile devices



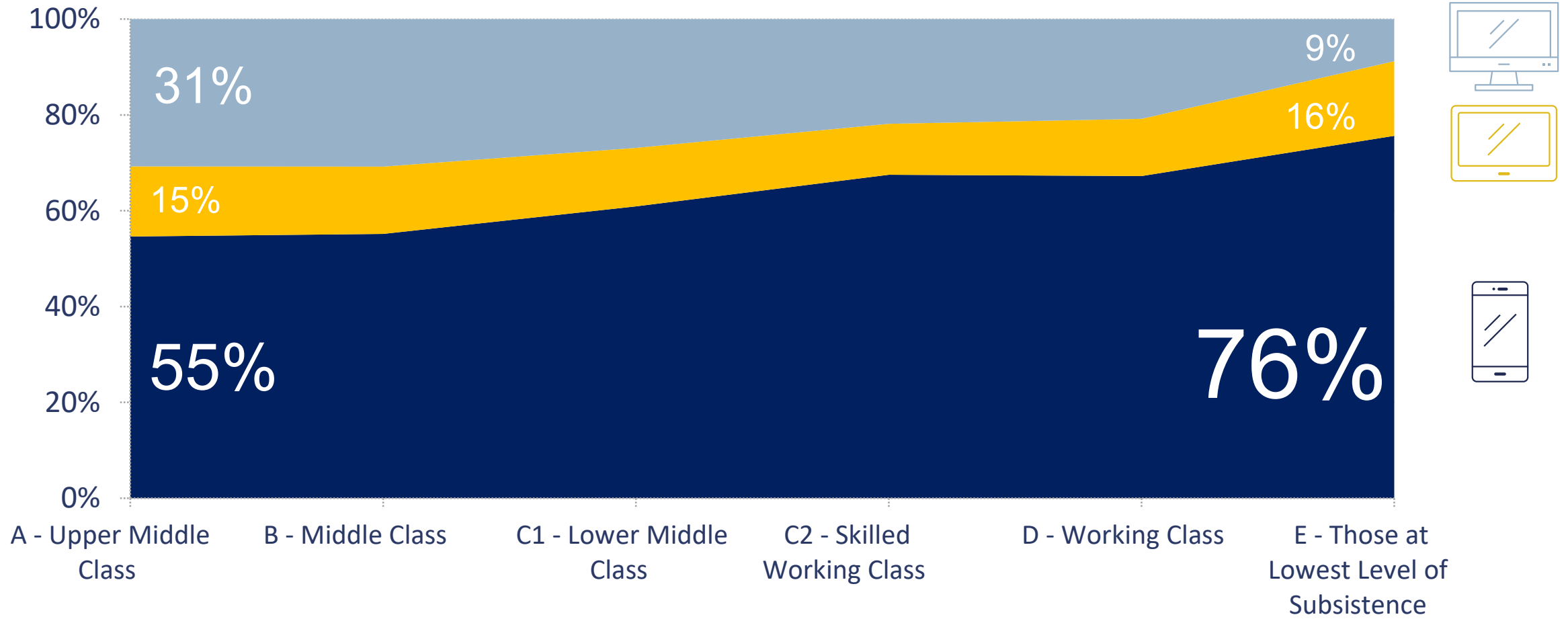
Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 81% of their time online on mobile devices compared to only 68% for males.

# Platform Share of Time Online by Social Grade

Smartphone share increases with decreasing social grade

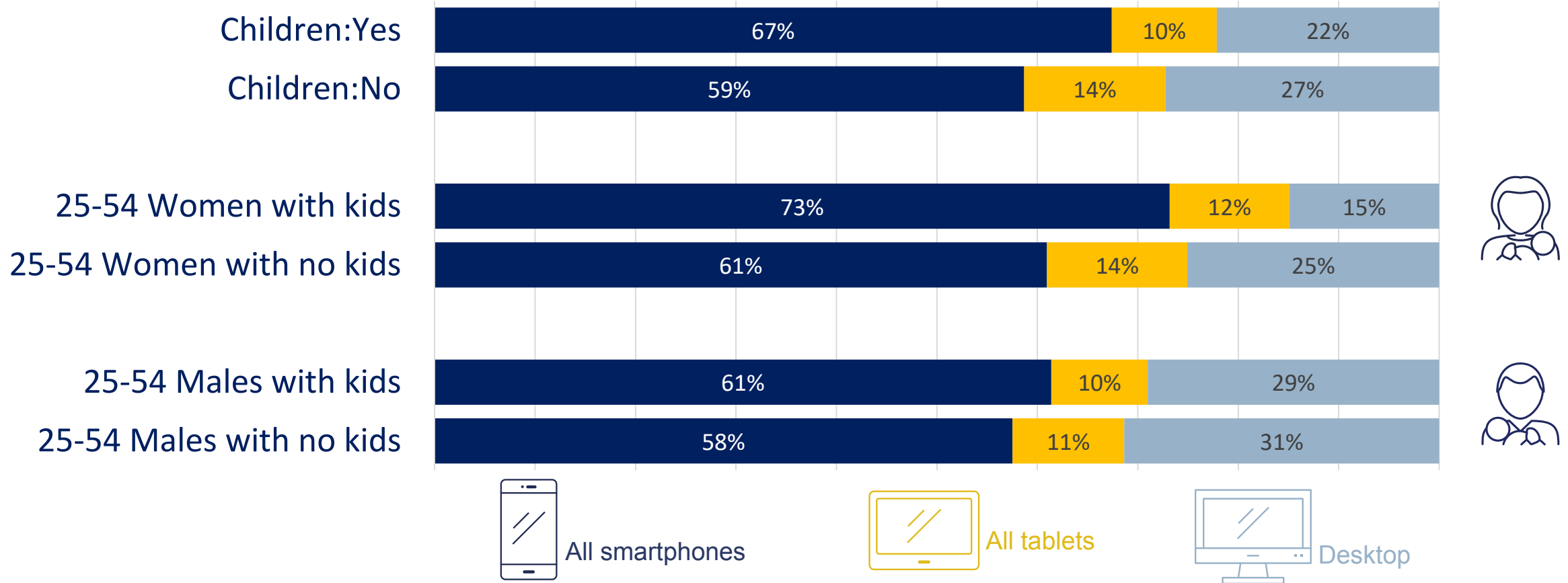
Platform Share of Minutes by Social Grade



# 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



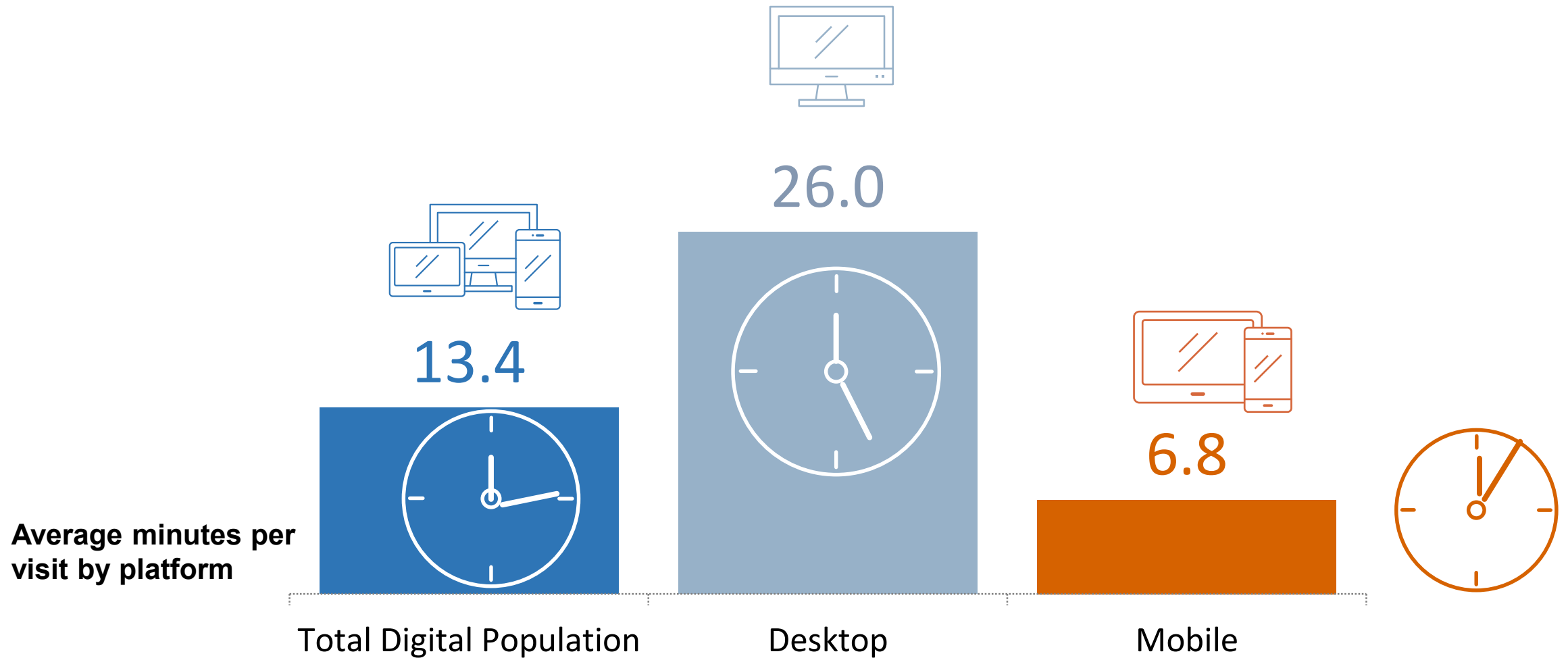
Source: comScore MMX Multi-Platform, Mar 2018, UK

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

\* 'Kids in household' used as a proxy for 'Parents'.

# Average Minutes per Visit by Platform

Mobile visits are **shorter**



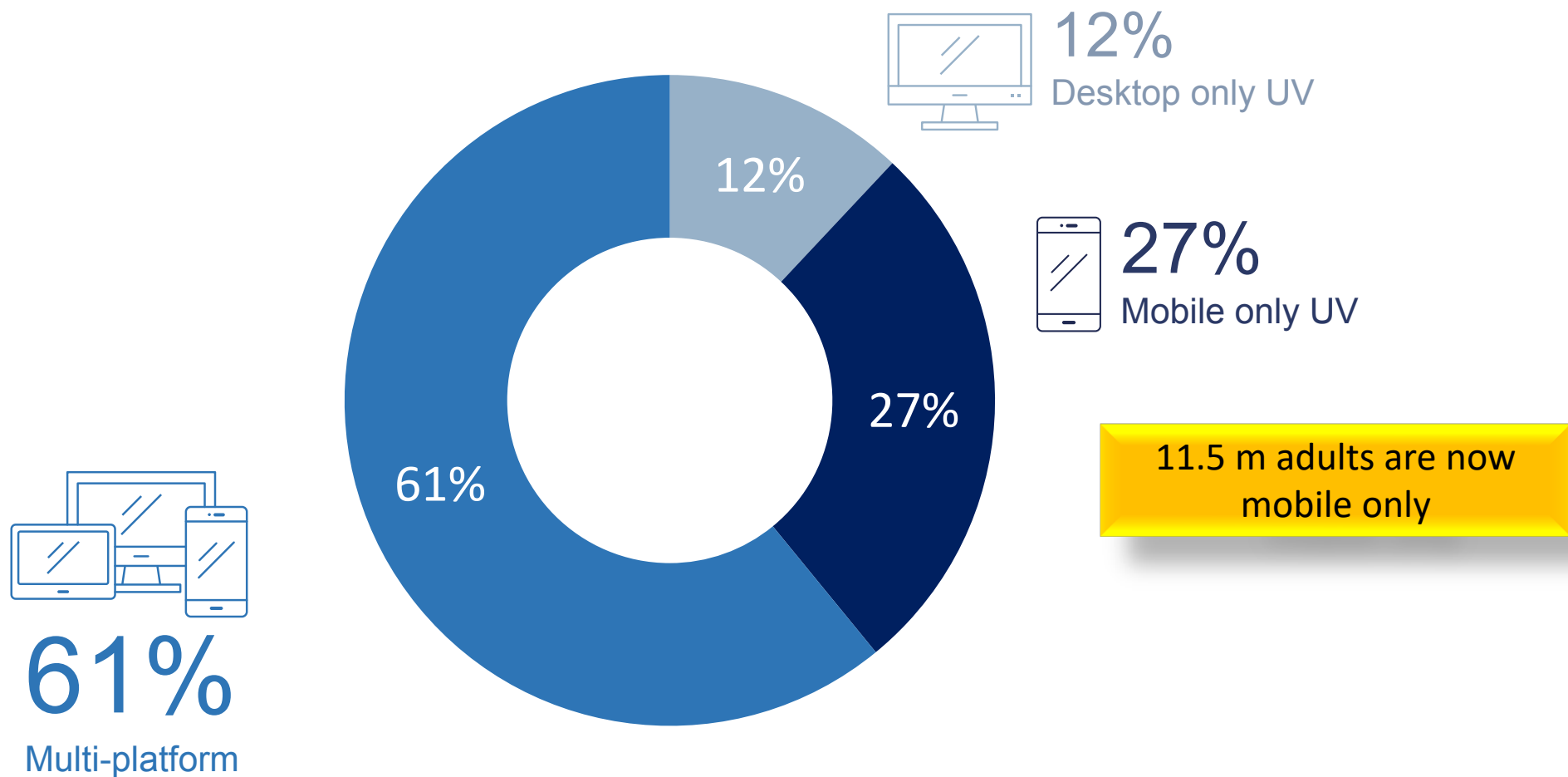
Average minutes per visit by platform



# Multi-Platform Usage

# Multi-Platform Usage

## Over a quarter of Online Adults are now Mobile Only

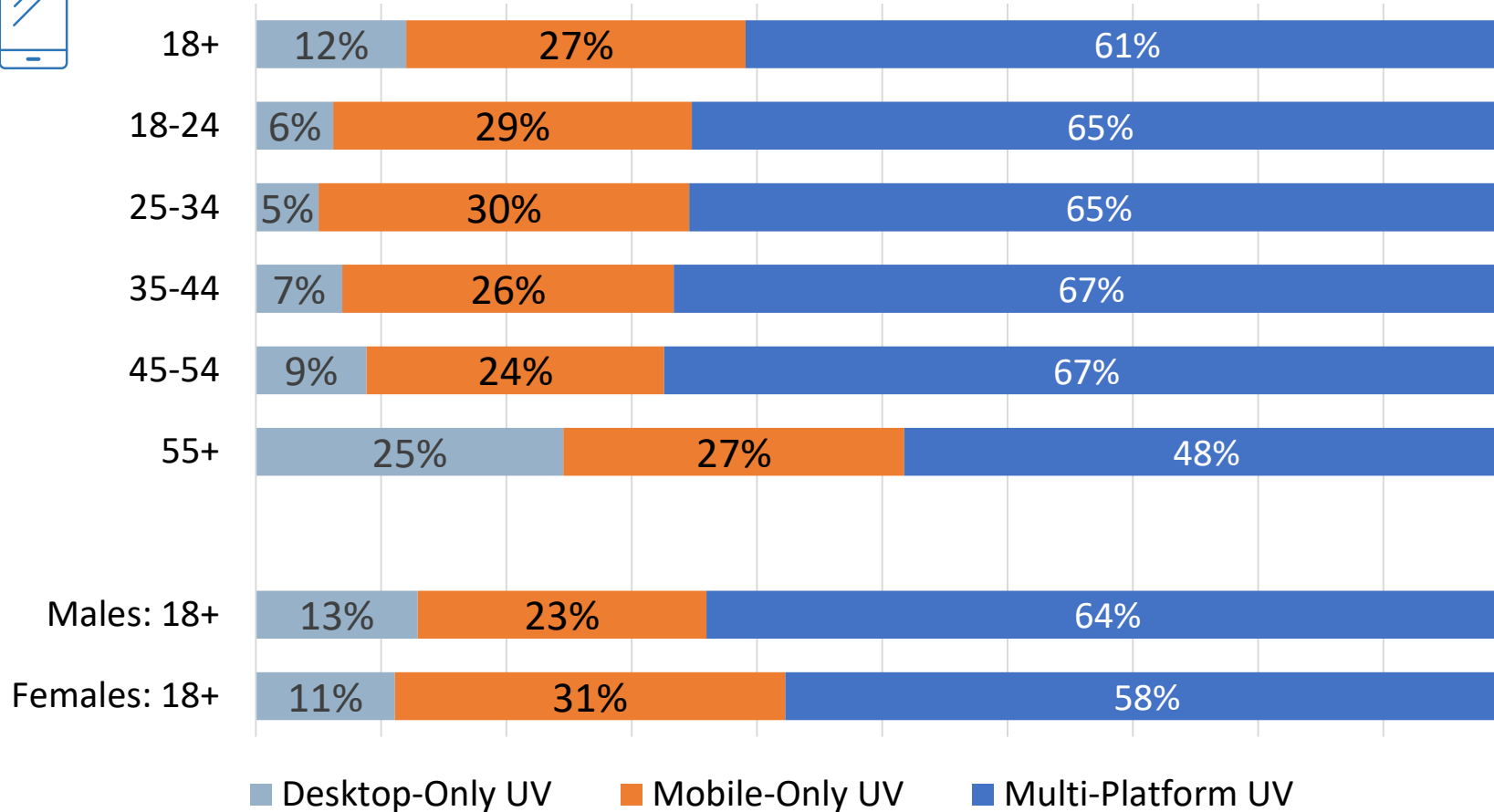


# Multi-Platform usage by age and gender

## 55+ are least likely to be Multi-Platform



Unique Viewers by Platform by Age & Gender



Only 48% of 55+ are Multi-Platform

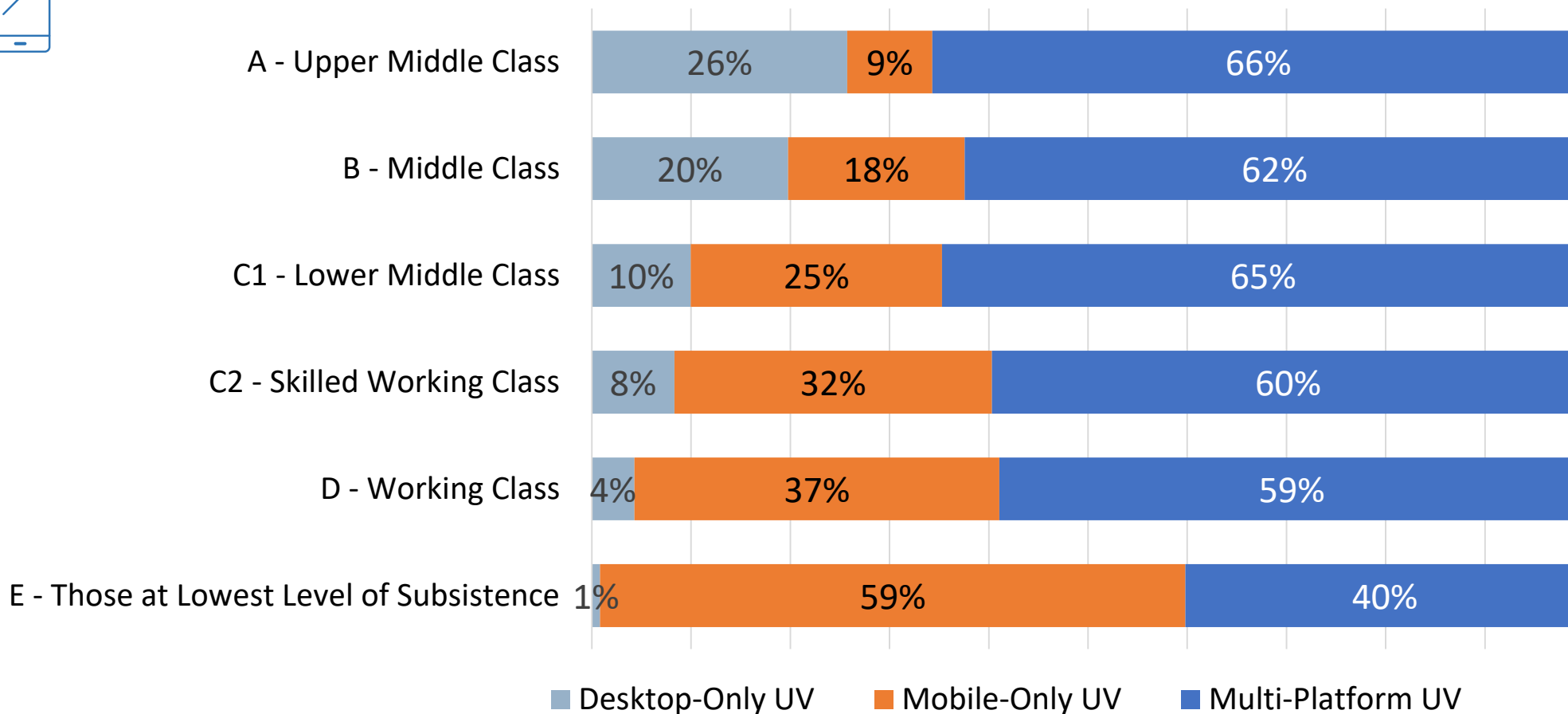
Females are more likely to be 'Mobile Only'

# Multi-Platform usage by social grade

## Lower social grades are least likely to be multi-platform



### Unique Viewers by Platform by Age & Gender

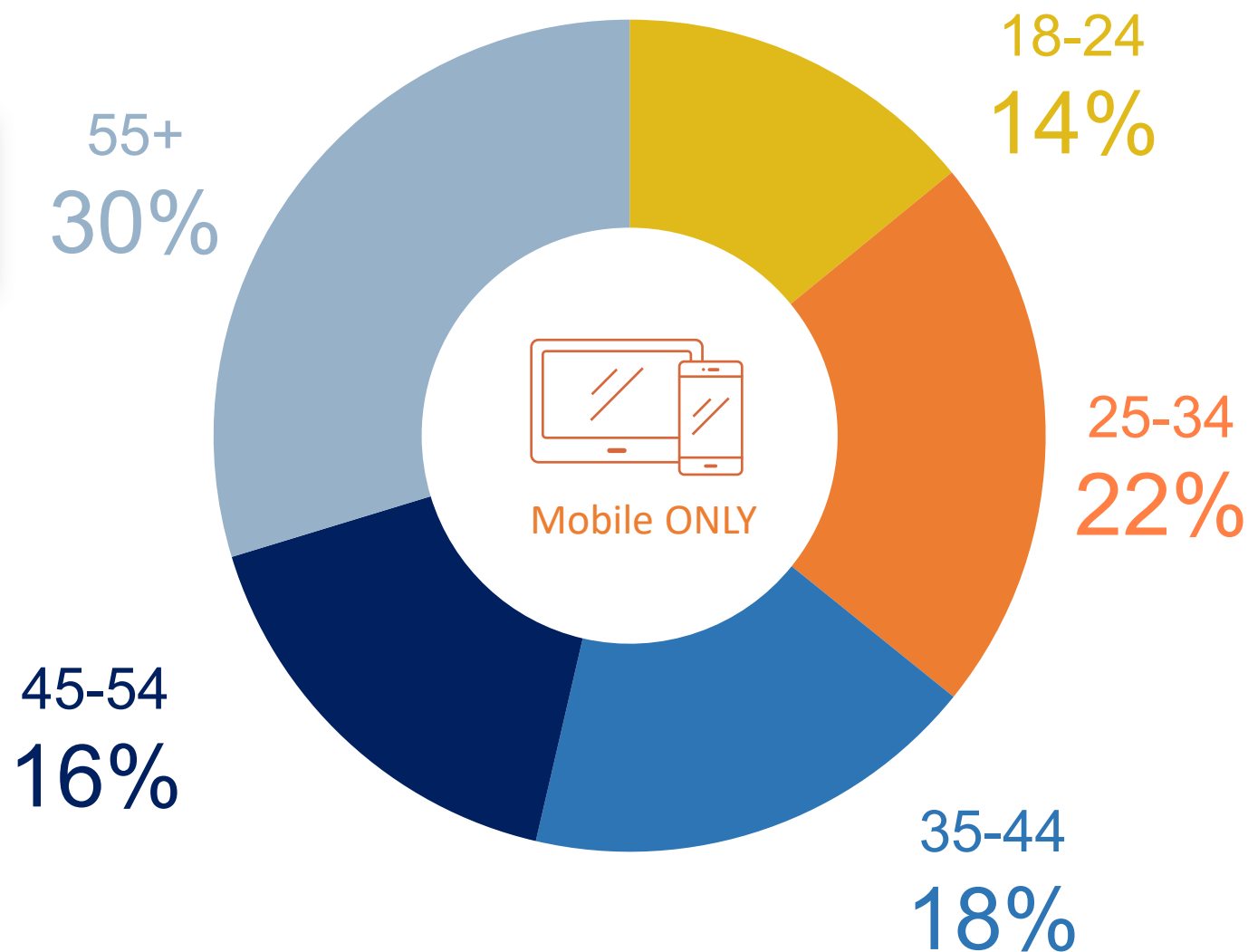




# Mobile Only Audience Unique Visitors by Age

The 'mobile only' audience is split across all age ranges

Tablets drive up 55+ share of the Mobile Online Audience





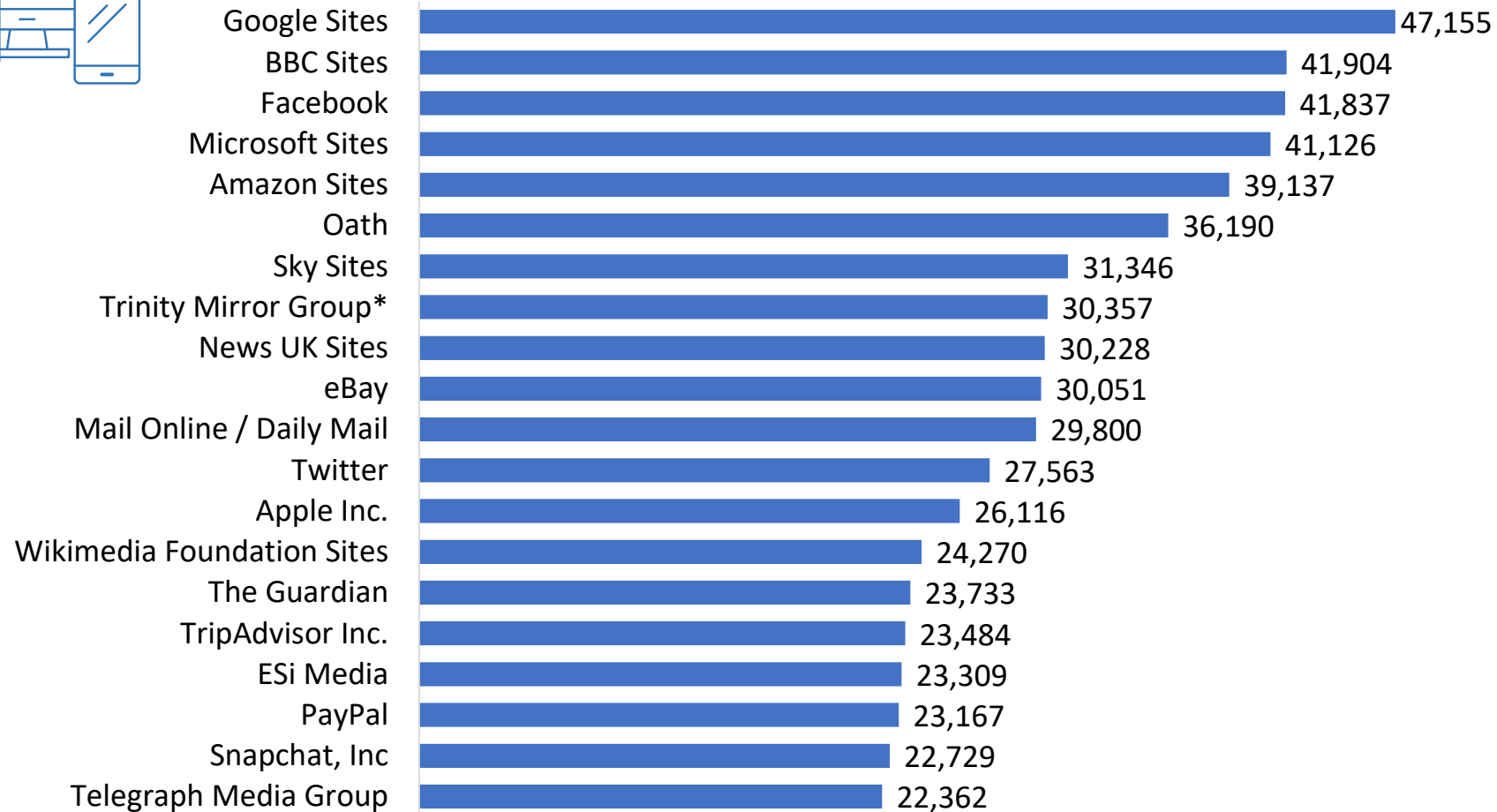
# Top Properties: Total Digital Population

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

## Google reaches 98% of the UK Online population



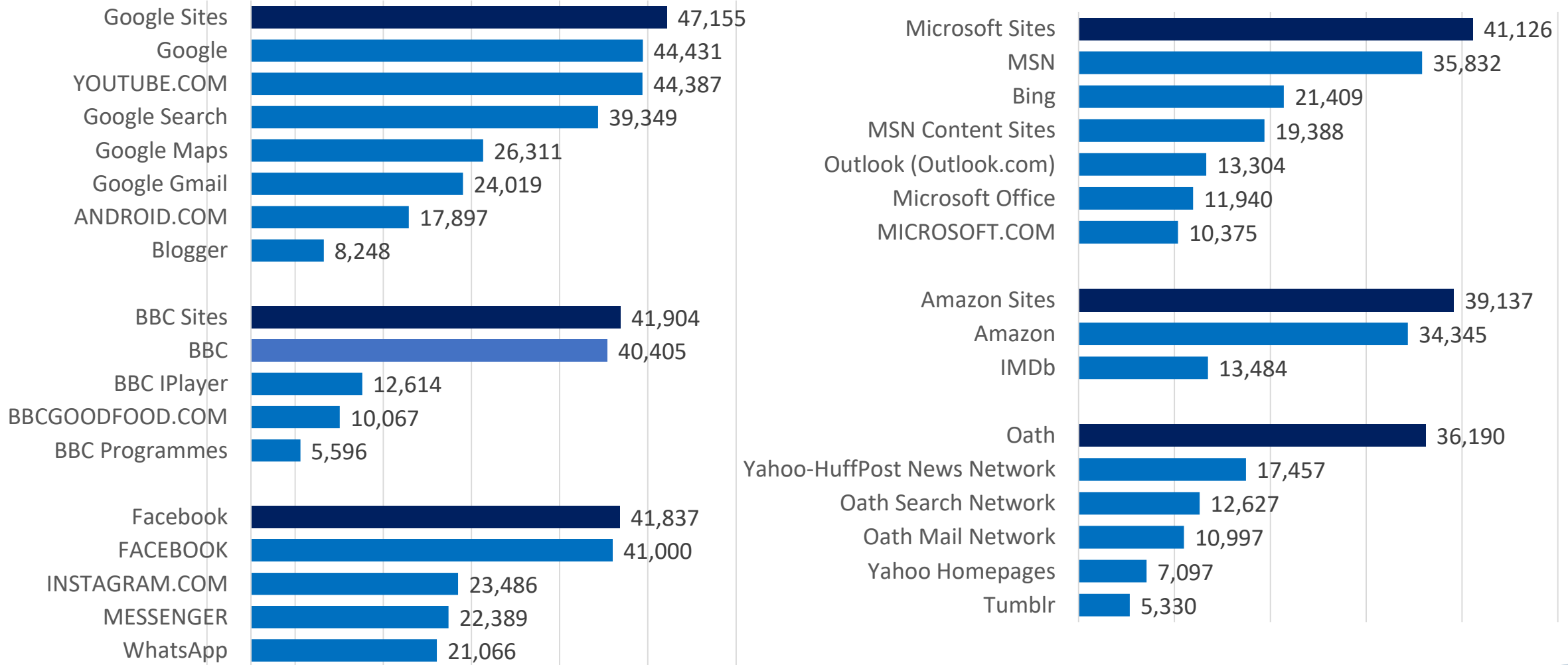
Total Unique Visitors/Viewers (000s) = 48,045



The top 5 properties all have online reach over 80%

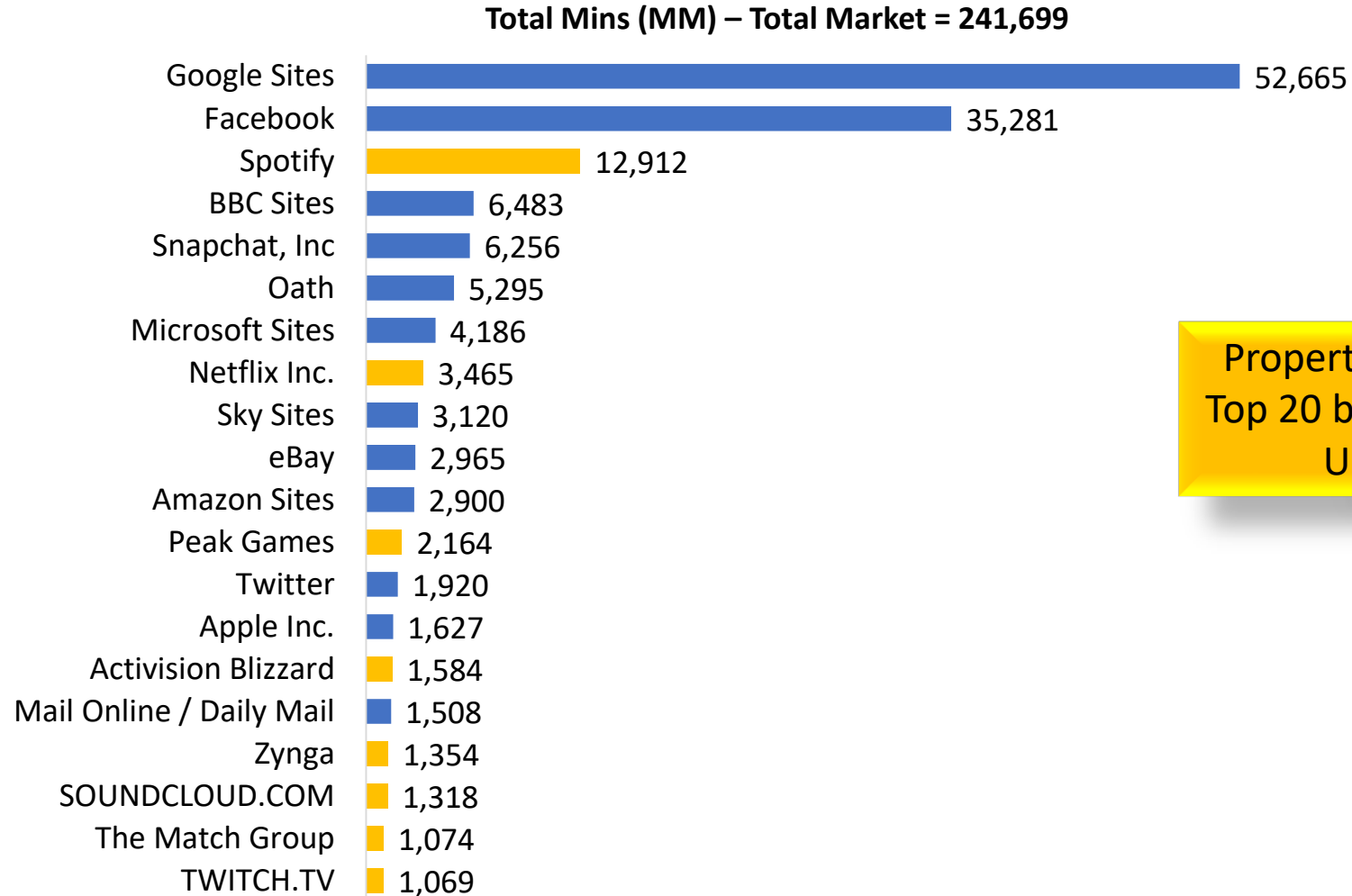
# Audience Breakdown of Top 6 Sites

## YouTube alone reaches more than all Facebook properties combined



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

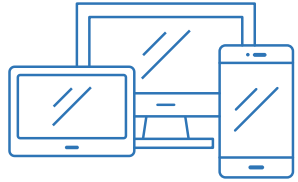
## Entertainment (games/music/TV) & social media sites drive minutes



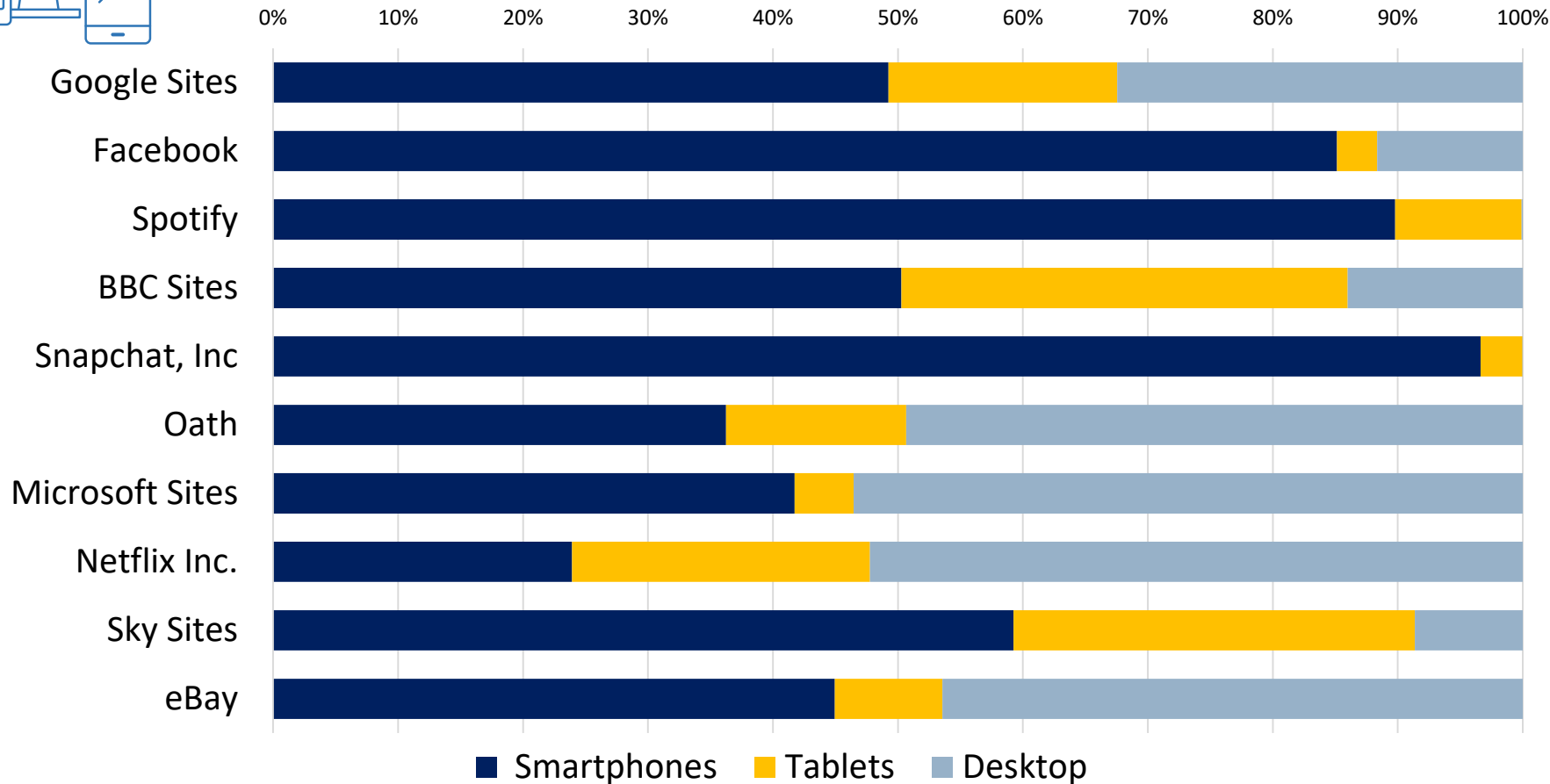
Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

# 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

81% of the UK online adult population use mobile apps



Total Mobile Reach

Mobile App Reach



Total Smartphone Reach

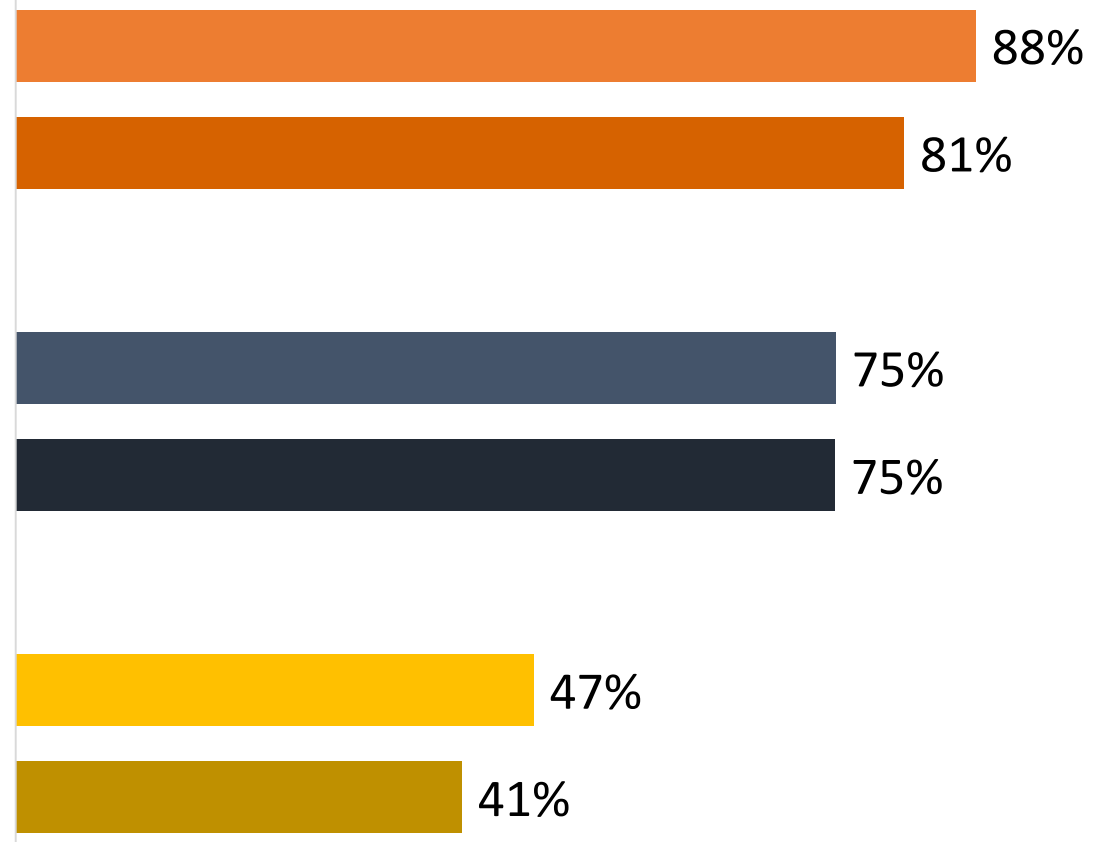
Smartphone App Reach



Total Tablet Reach

Tablet App Reach

## Reach of Online UK Population – March 2018



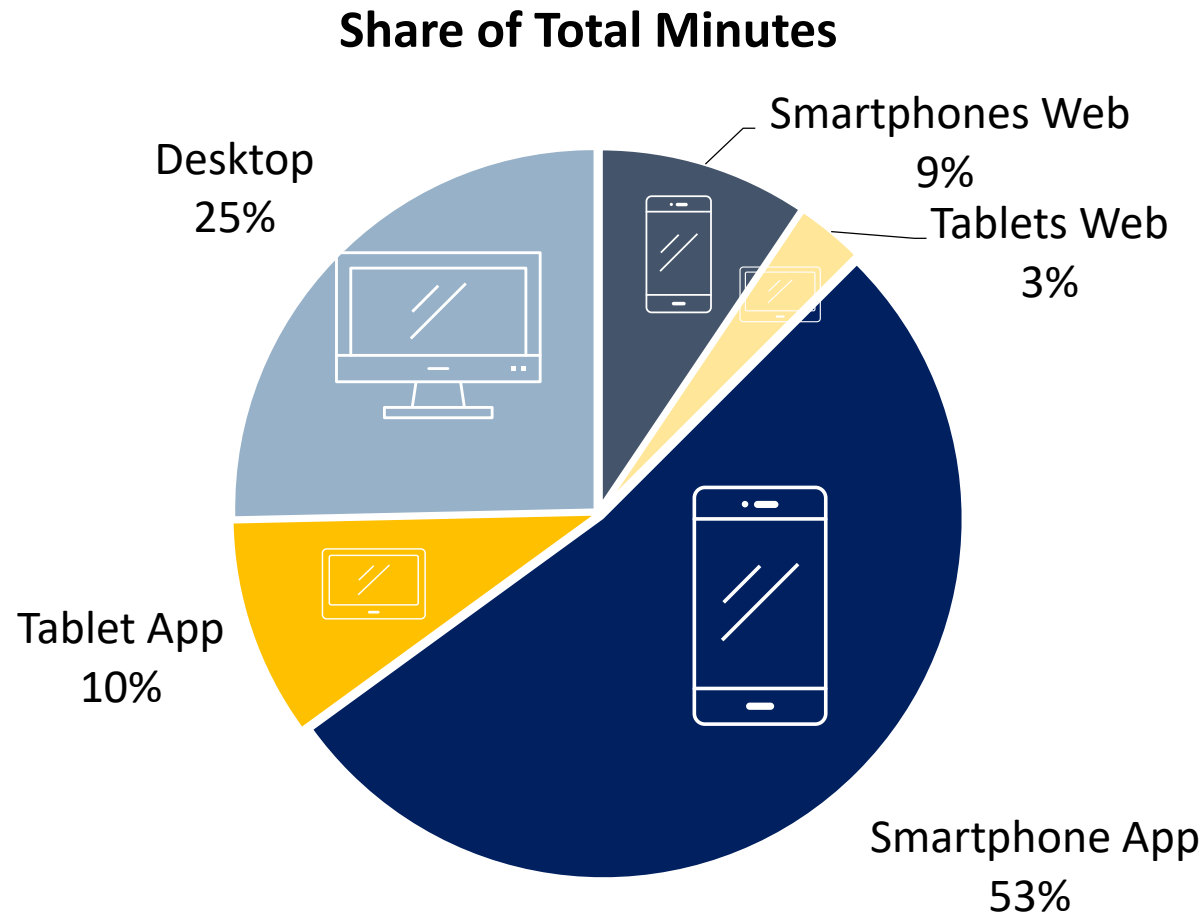
Source: comScore MMX Multi-Platform, March 2018, UK, Adults 18+  
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

\*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 62% of all Minutes



Mobile Apps account for  
**62%** of ALL minutes &  
**83%** of MOBILE  
minutes



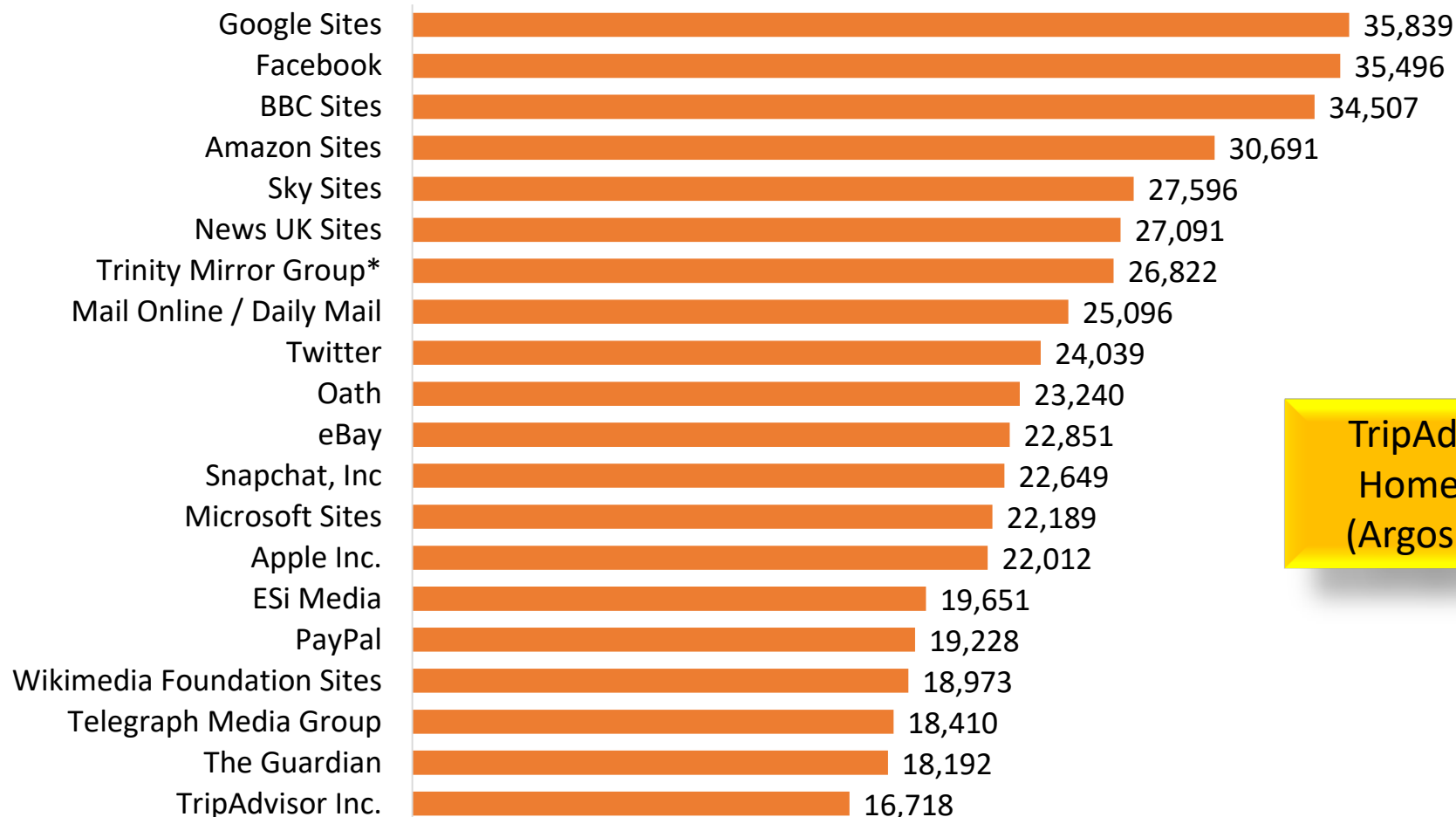
# Top Properties: Mobile Population

# Top 20 Mobile Properties ranked by Unique Visitors

37m adults accessed mobile content in March 2018 (via browser and app)



Total Unique Visitors/Viewers (000s) – Total Mobile (18+) = 37,328



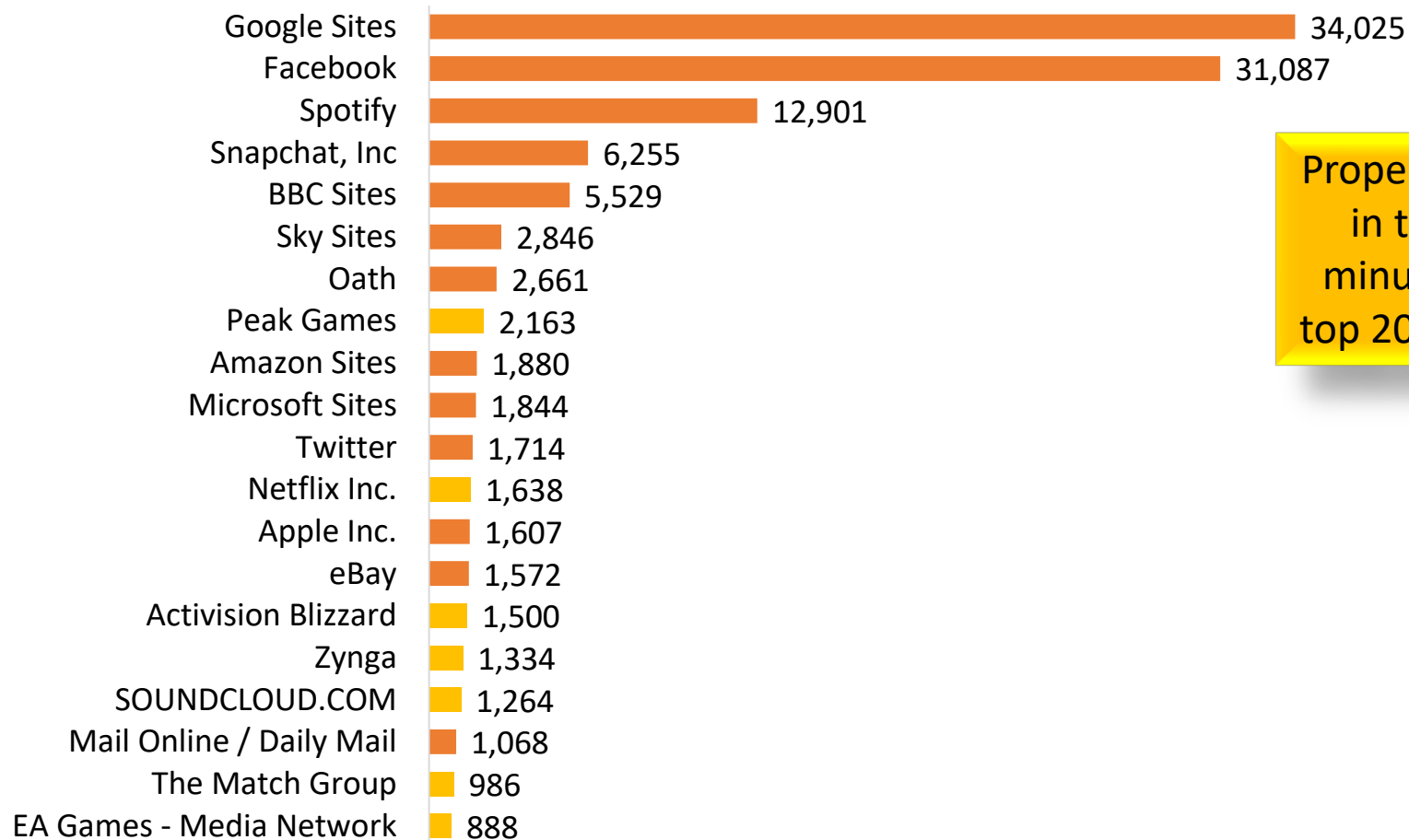
TripAdvisor replaces Home Retail Group (Argos) in the top 20

# Top 20 Mobile Properties ranked by minutes

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



Total Mins (MM) – Total Market = 176,908



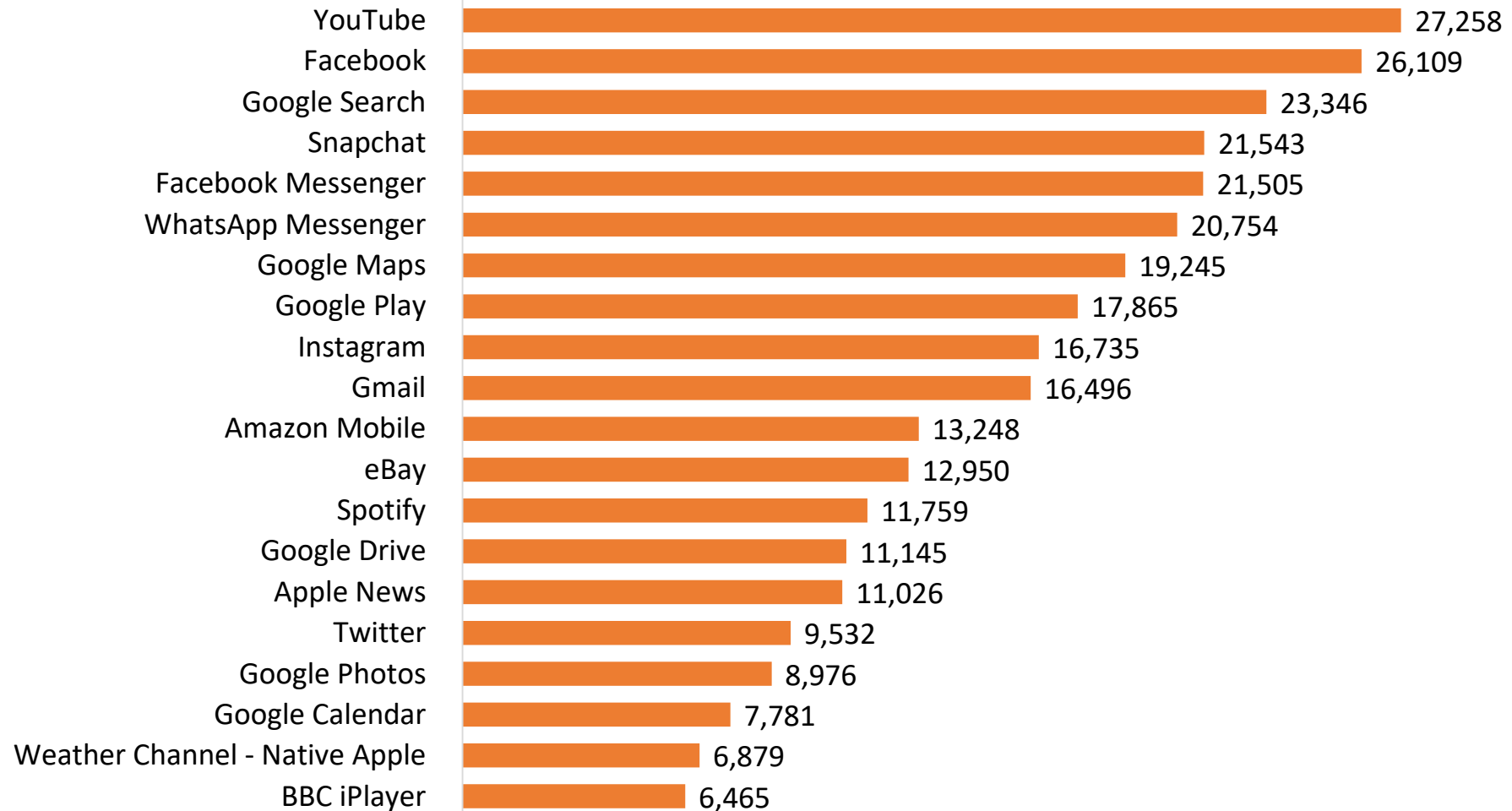
Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

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

## Global Brands dominate top 20 Apps

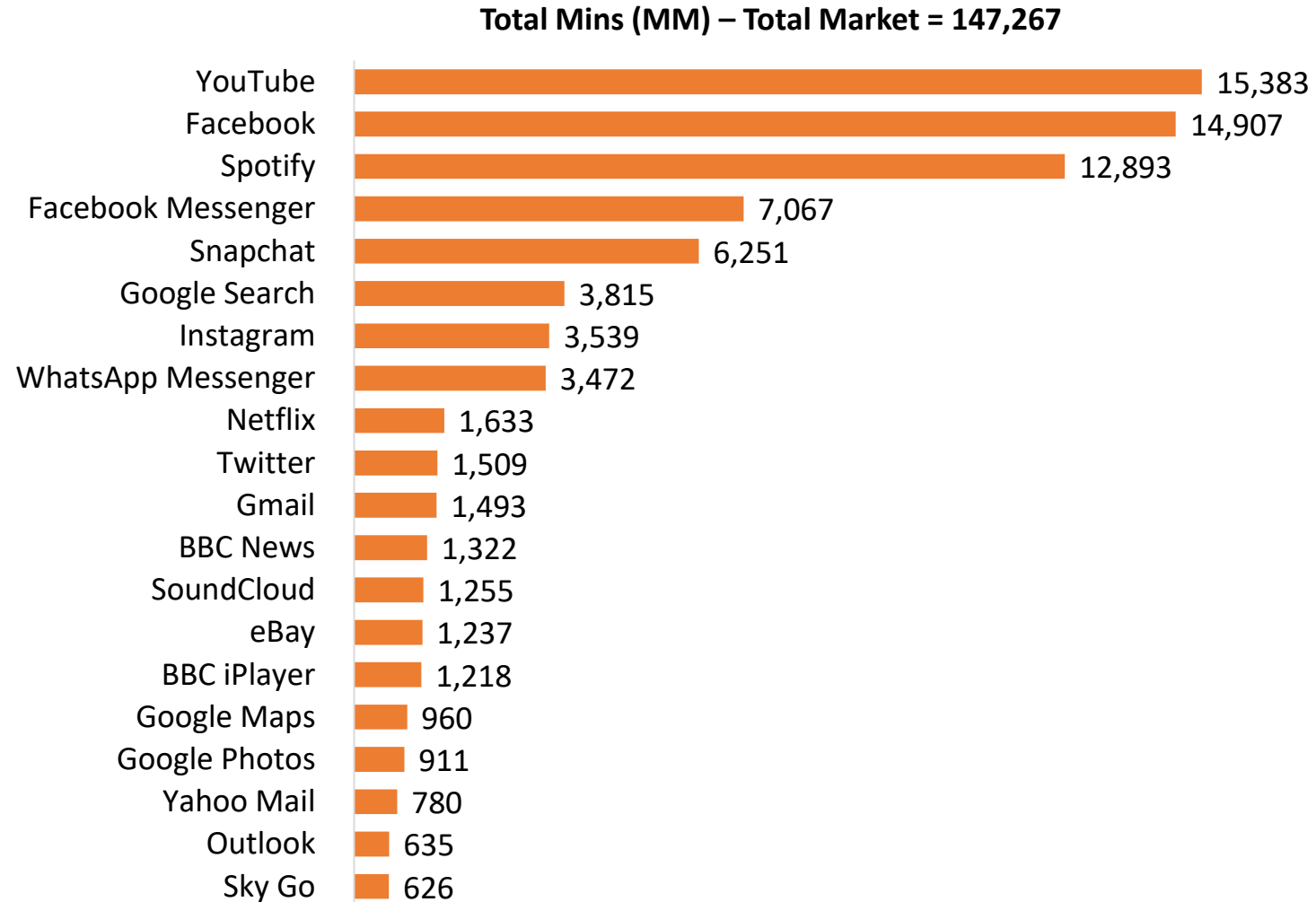


Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 34.5m



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

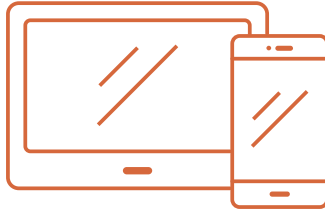
## Spotify, Netflix & Twitter are in the top 10 for minutes spent on apps



# 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



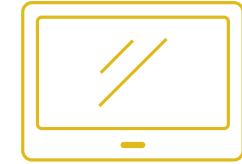
	(Million)
YouTube	27.3
Facebook	26.1
Google Search	23.3
Snapchat	21.5
Facebook Messenger	21.5
WhatsApp Messenger	20.8
Google Maps	19.2
Google Play	17.9
Instagram	16.7
Gmail	16.5

### Smartphone Top 10



	(Million)
YouTube	23.4
Facebook	23.3
Google Search	21.2
WhatsApp Messenger	20.6
Facebook Messenger	20.3
Google Maps	18.1
Google Play	17.9
Snapchat	16.5
Gmail	15.4
Instagram	14.7

### Tablet Top 10



	(Million)
Snapchat	6.9
YouTube	5.7
Facebook	4.2
BBC iPlayer	3.5
Google Search	3.1
Instagram	2.8
Apple News	2.2
Spotify	2.1
Netflix	2.0
BBC Weather	1.9

# Top 10 Mobile Apps by Minutes by Mobile Platform

## Spotify, Netflix & Twitter enter the top 10 for Minutes

### Total Mobile Top 10



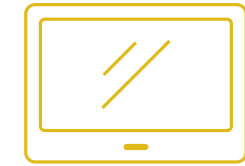
	(Million)
YouTube	15.4
Facebook	14.9
<b>Spotify</b>	<b>12.9</b>
Facebook Messenger	7.1
Snapchat	6.3
Google Search	3.8
Instagram	3.5
WhatsApp Messenger	3.5
<b>Netflix</b>	<b>1.6</b>
<b>Twitter</b>	<b>1.5</b>

### Smartphone Top 10



	(Million)
Facebook	14.1
Spotify	11.6
YouTube	10.4
Facebook Messenger	7.0
Snapchat	6.0
WhatsApp Messenger	3.5
Instagram	3.5
Google Search	2.8
Twitter	1.3
Gmail	1.3

### Tablet Top 10



	(Million)
YouTube	5.0
Spotify	1.3
Google Search	1.0
Netflix	0.8
Facebook	0.8
BBC iPlayer	0.8
Sky Go	0.5
ITV Hub	0.4
BBC News	0.3
Gmail	0.2

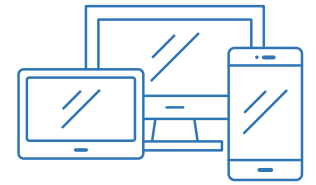
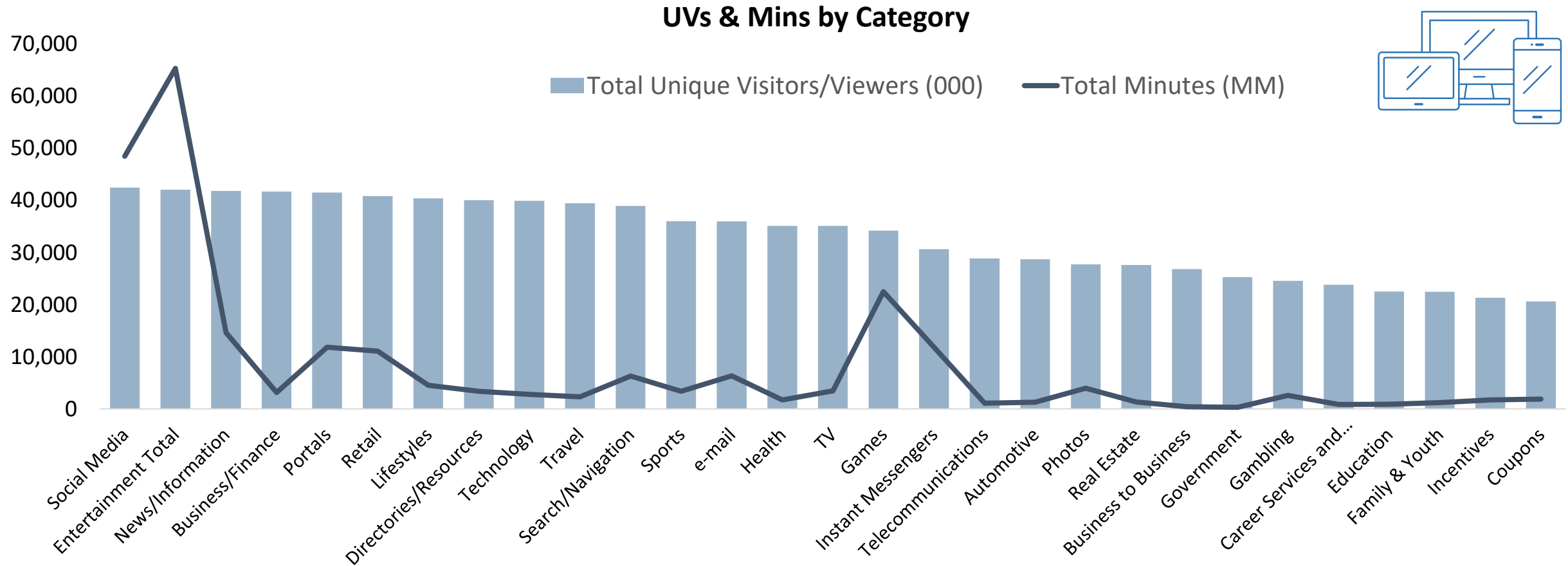




# Categories

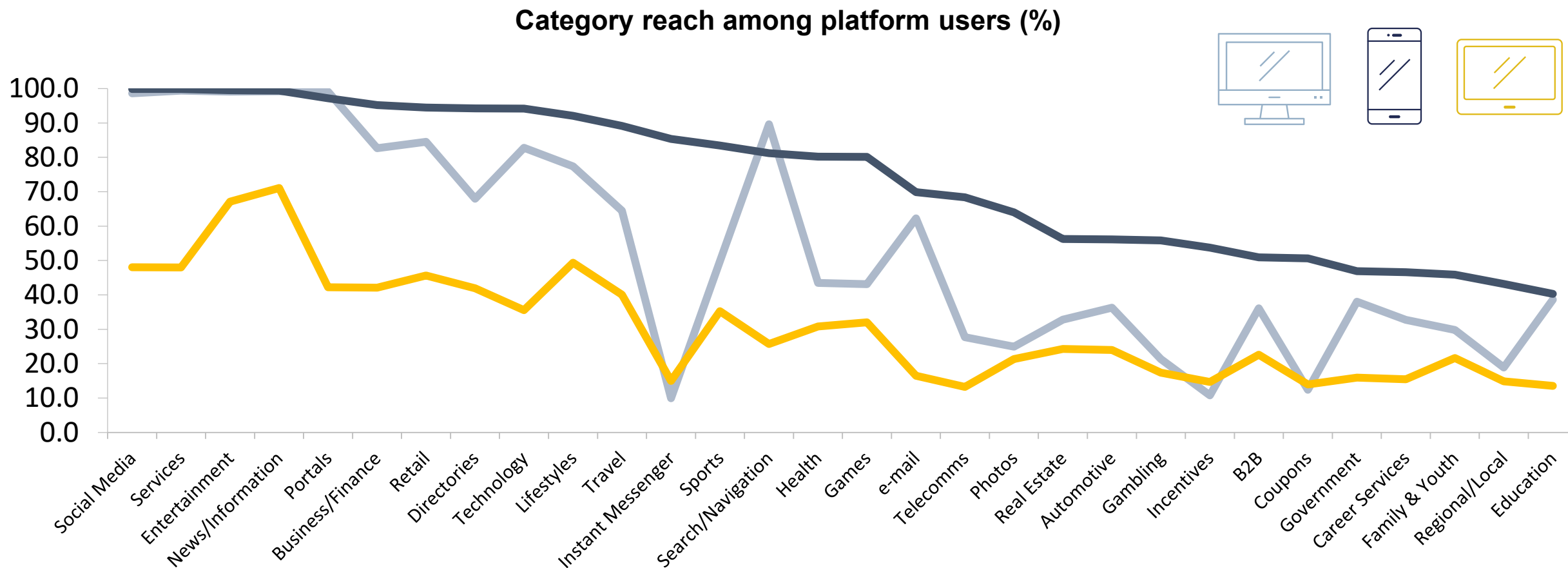
# Major Categories Online – Unique Visitors v Minutes

## 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, March 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%**



Smartphone total

**62%**



Tablet total

**13%**

Education	86%
Auctions	74%
Car Rental	73%
Government	67%
Family & Youth	67%
Airlines	65%
Business to Business	64%
Entertainment - Movies	64%
News/Research	63%
Autos Manufacturer	63%

• Instant Messengers	98%
• Job Search	94%
• Gay/Lesbian	93%
• Photos	91%
• Books	87%
• Social Media	84%
• Entertainment - Music	84%
• Personals	84%
• Maps	83%
• Retail - Music	83%

• TV	39%
• Radio	36%
• General News	31%
• Coupons	28%
• Incentives	27%
• Online Gaming	20%
• Real Estate	18%
• Lotto/Sweepstakes	16%
• Travel - Information	16%
• Family & Youth	16%

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

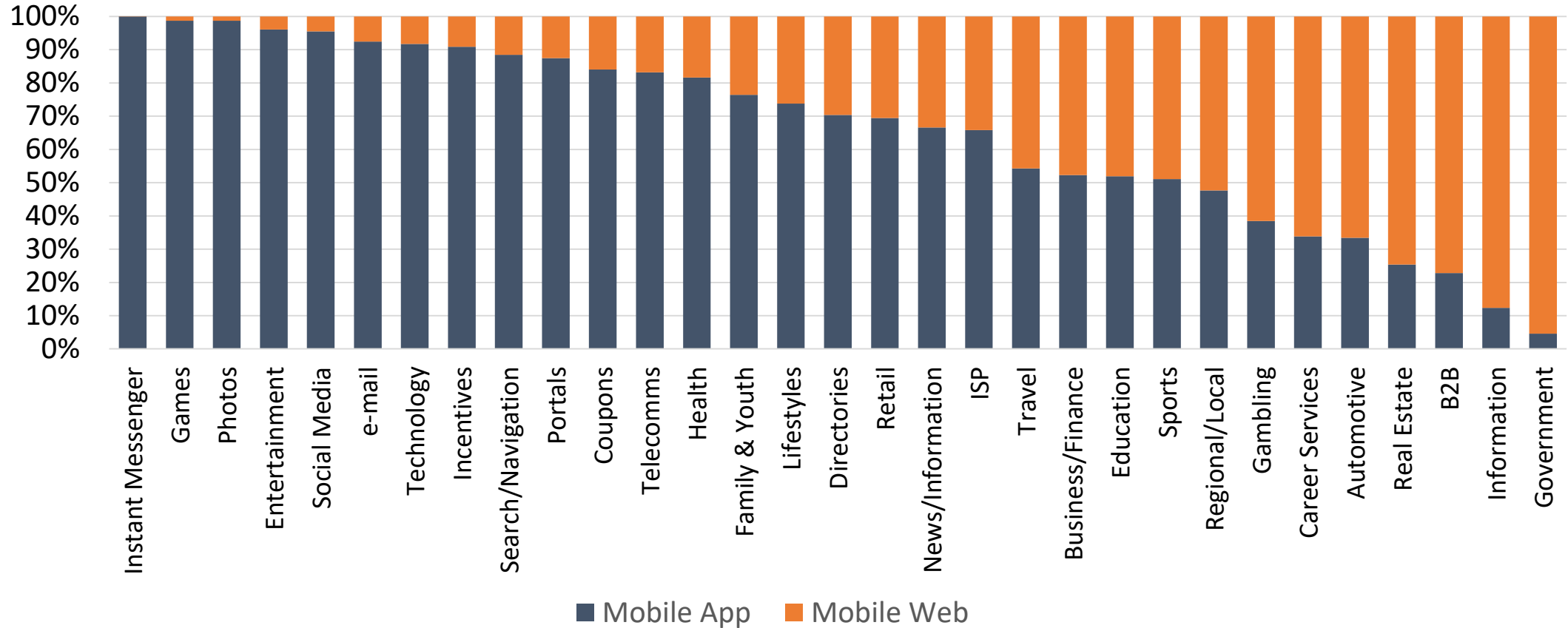
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

# Share of Mobile Minutes by Access Type by Category

## Mobile App share of minutes varies by content & service



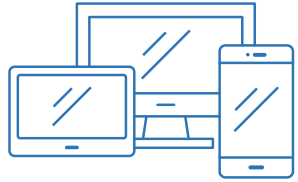
Mobile App V Mobile Web Share of Mobile Minutes



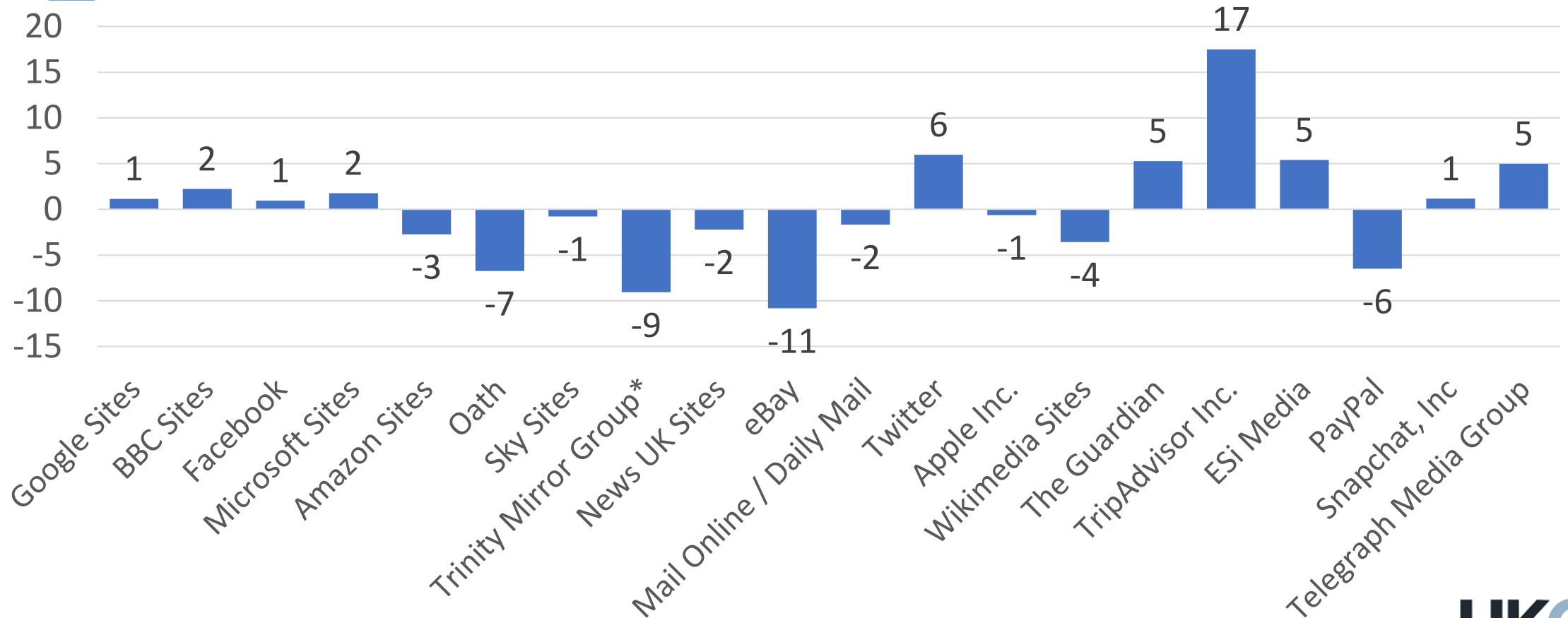


# Key Changes: Mar 18 v Dec 17

# Top 20 Properties by 'Unique Visitors' - % Growth Mar 18 v Dec 17



## Unique Visitor % Growth Mar 2018 v Dec 2017

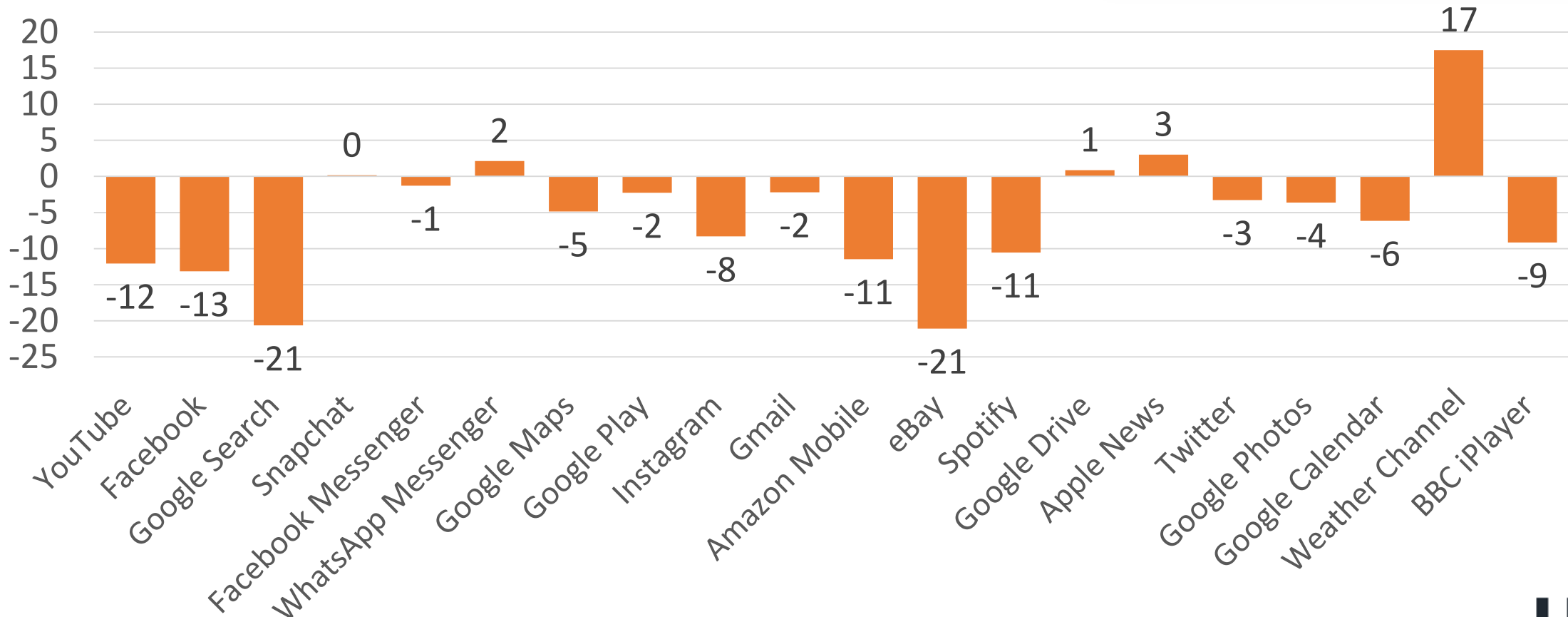


# Top 20 Mobile Apps by 'Unique Visitors' - % Mar 18 v Dec 17



## Unique Visitor % Growth Mar 2018 v Dec 2017

The snow contributed to a UV uplift for the weather channel in March!



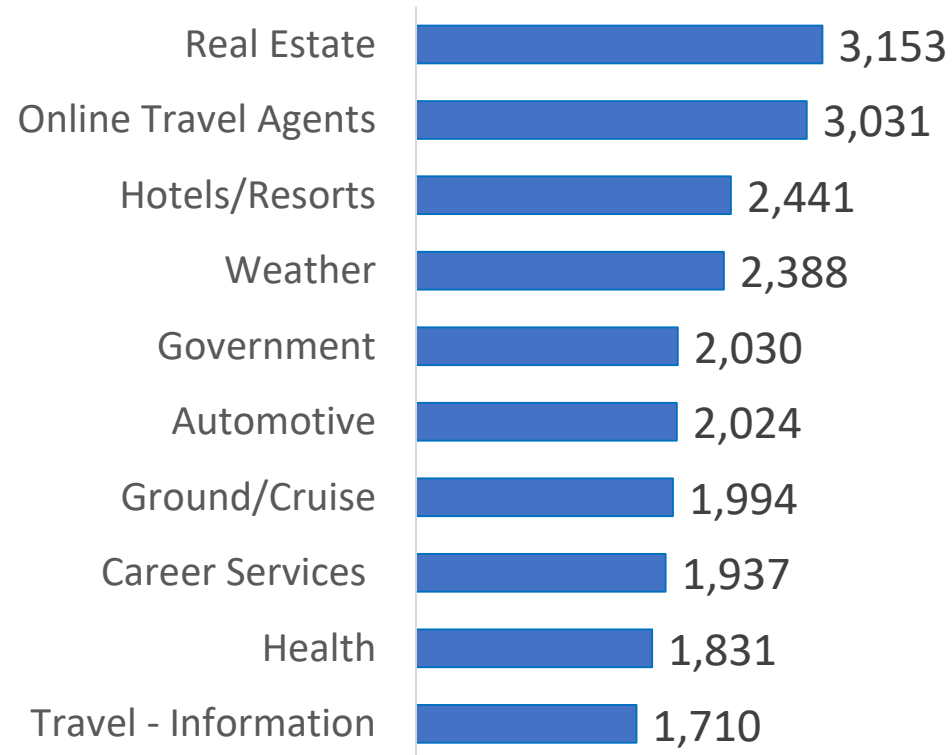


# Top Performing Categories based on Visitor & Minutes Growth Mar 18 v Dec 17

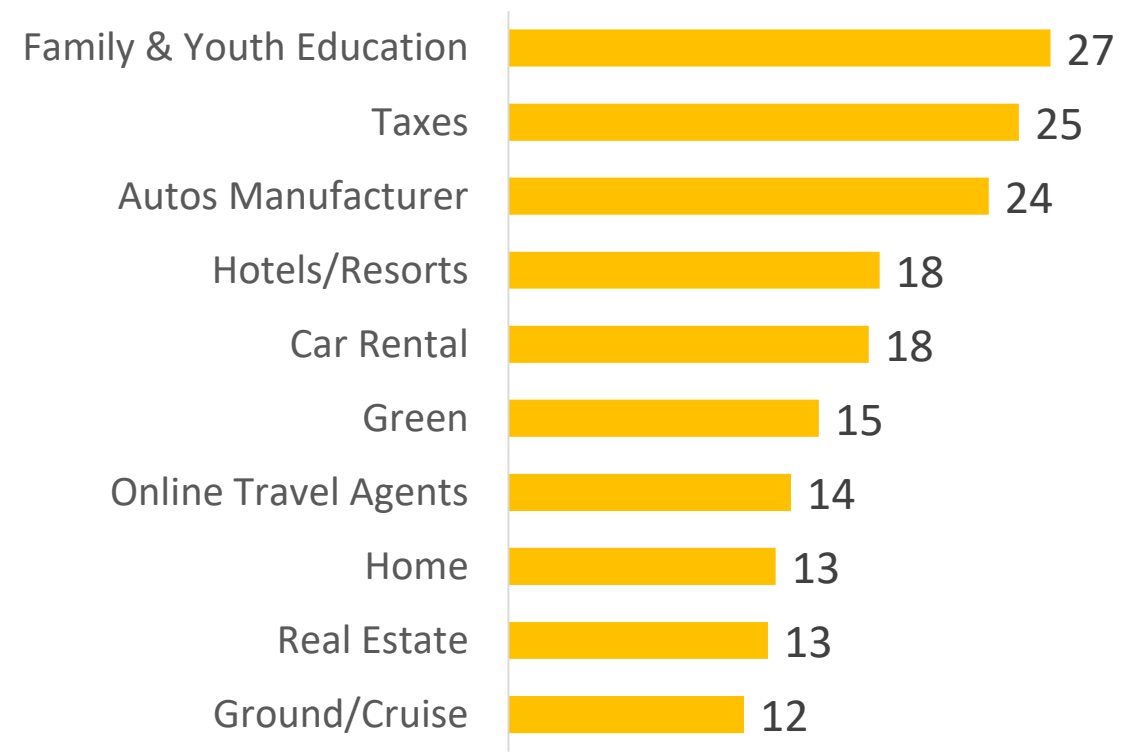
## Property, Weather, Travel & Autos witness biggest gains since December

### Category Growth – Mar 18 v Dec 17

#### Unique Visitor Increase: Mar 18 v Dec 17 (000s)



#### Unique Visitor % Increase: Mar 18 v Dec 17



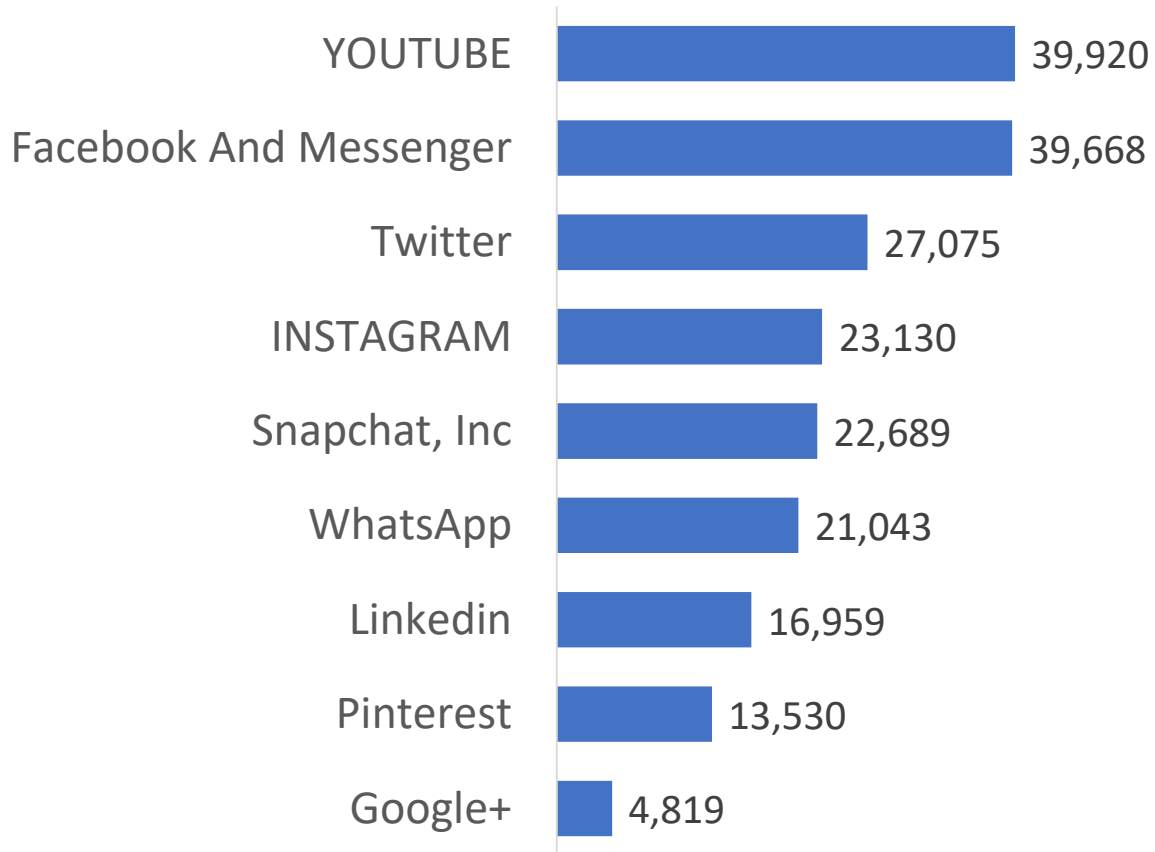
Source: comScore MMX Multi-Platform, March 2018, UK, 18+

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.

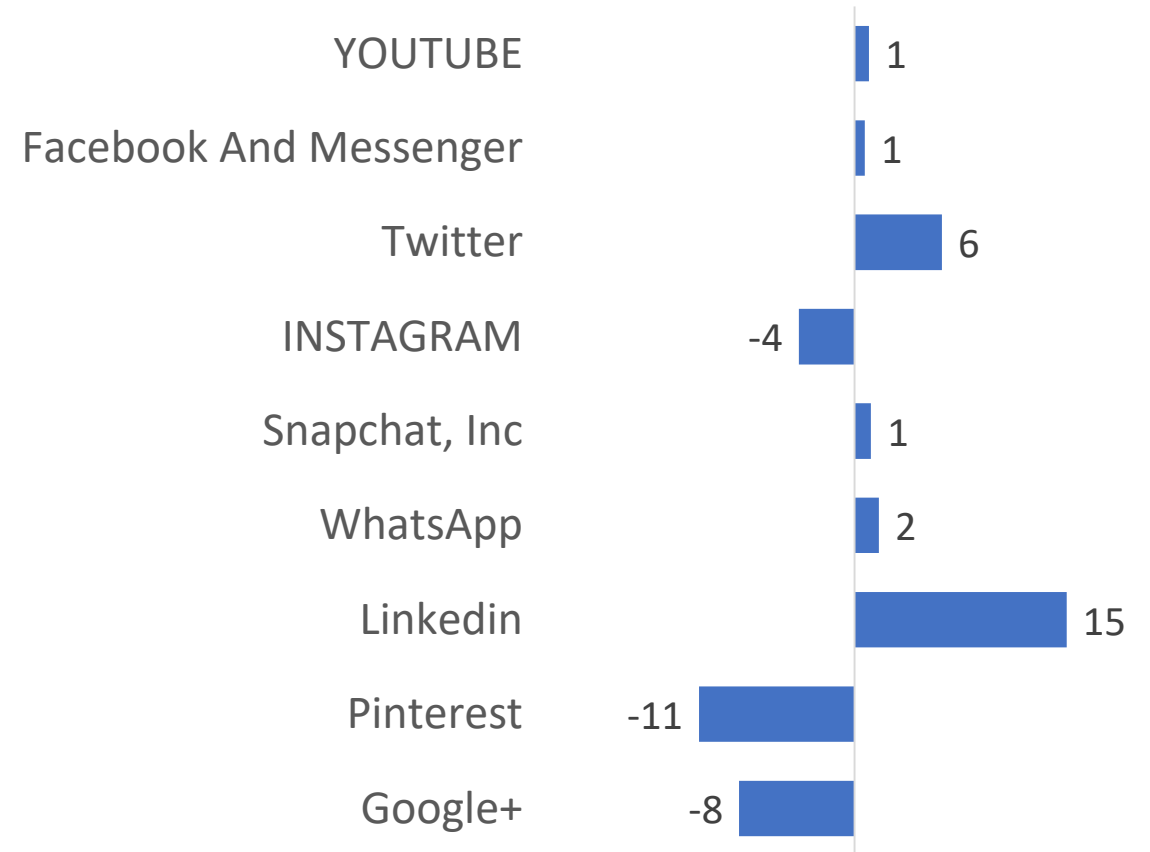
# Change in Audience for Social Media Brands

## Twitter & LinkedIn Experienced Biggest Gains

Unique Visitors 18+ (000s) - March 2018



Unique Visitors 18+ % Change Mar 18 v Dec 17



Source: comScore MMX Multi-Platform, March 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](mailto: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](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](http://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](http://www.comscore.com/Products/Audience_Analytics/Video_Metrix)*

# 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/](http://www.ukom.uk.net/)