



The Impact of Covid-19 on UK Online Usage

Analysis for the first full Month of
lockdown: April 2020

Julie Forey



Time online

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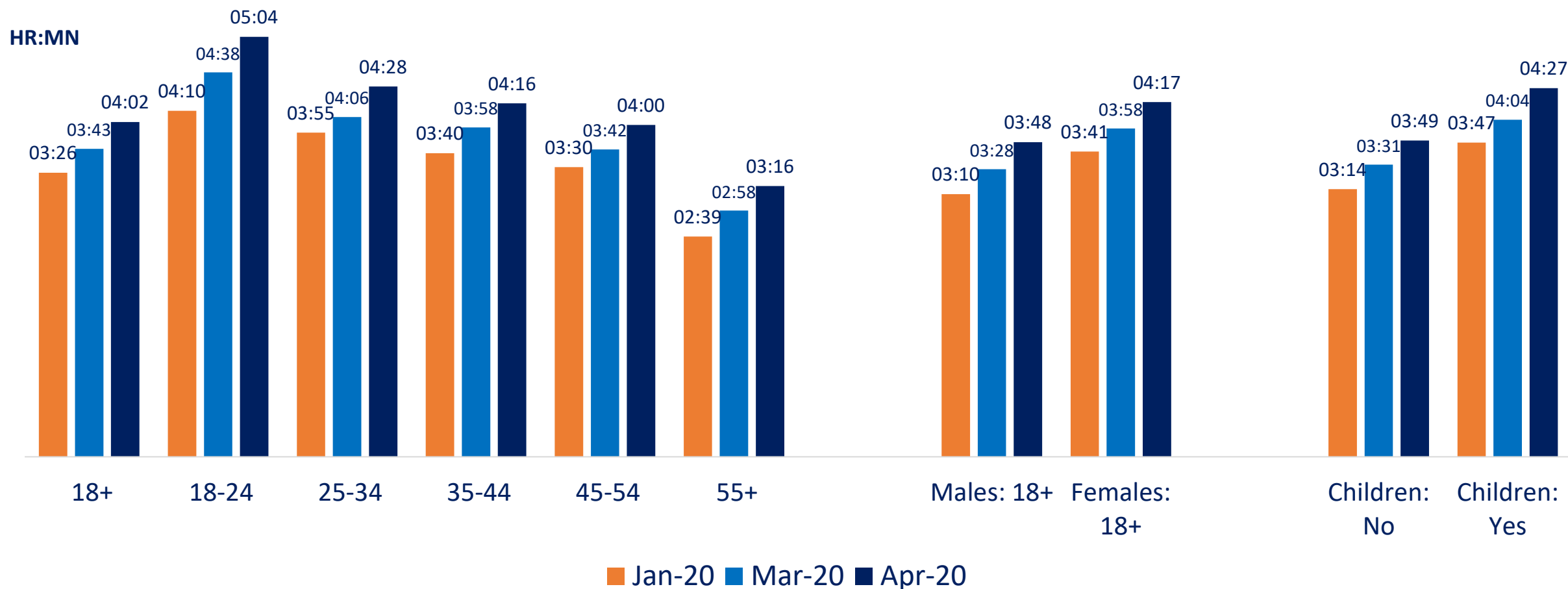
Key Changes: Jan-April 2020

- Online adults spent on average 37 mins more online in April v January despite April having 1 less day
- Average time online surpassed 4 hours per day among 18+ in April



Average Time Spent Online Per Day by Demos Jan-Apr 2020

18+ Average Time Online increased by 37 mins to 4hrs and 2 minutes



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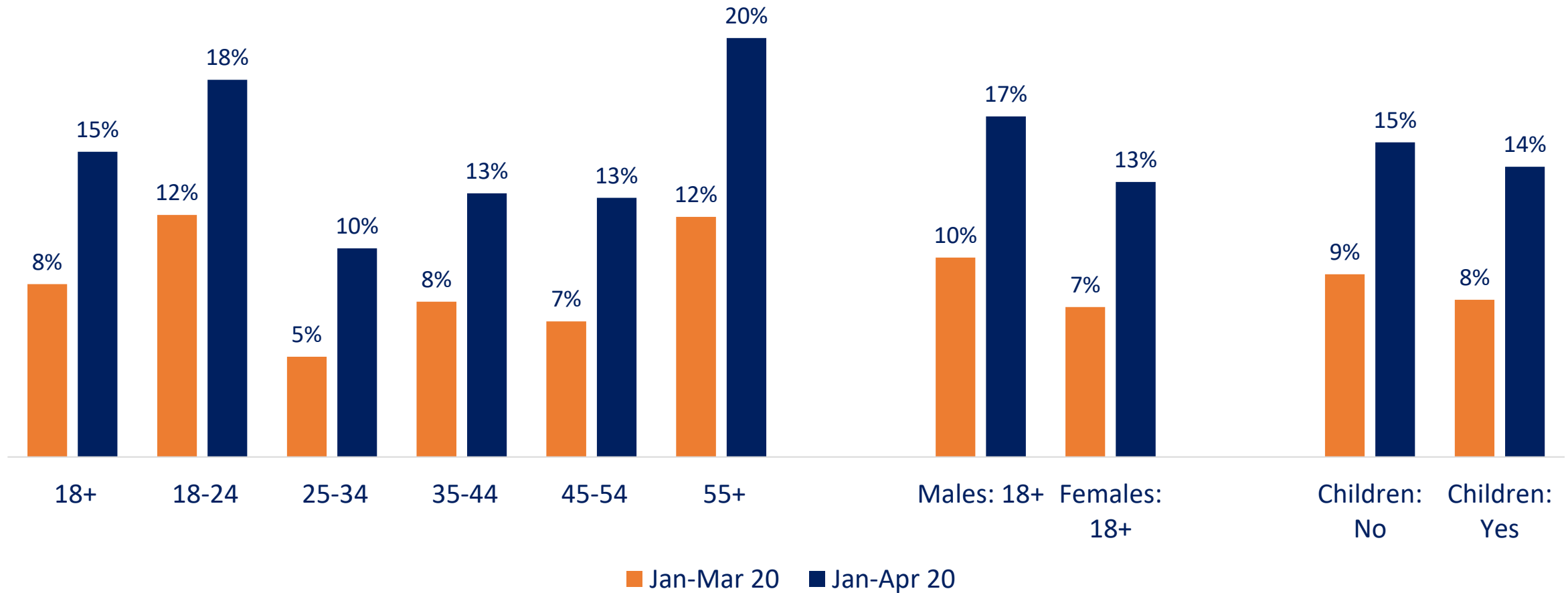
Source: Comscore MMX Multi-Platform, Adults 18+, Jan, Mar & April 2020, UK

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

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Time Online % Change by Demographics: Jan-Apr 2020

Total Minutes increased by 15% - Growth was higher among 18-24s and 55+



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Source: Comscore MMX Multi-Platform, Adults 18+, Jan, Mar & April 2020, UK

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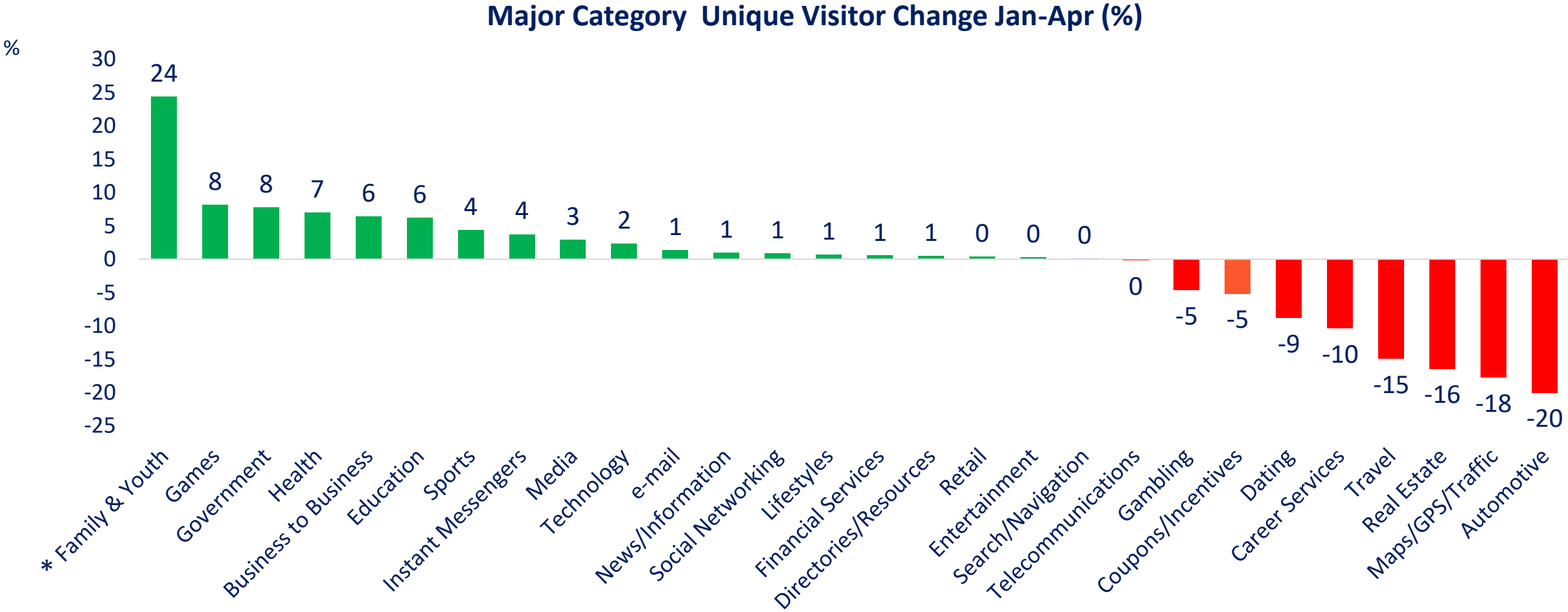
All Categories

Key Changes: Jan-Apr 2020



Major Category Unique Visitor Change: Jan-Apr 2020 (%)

Games, Government, Education & Health all witnessed uplifts



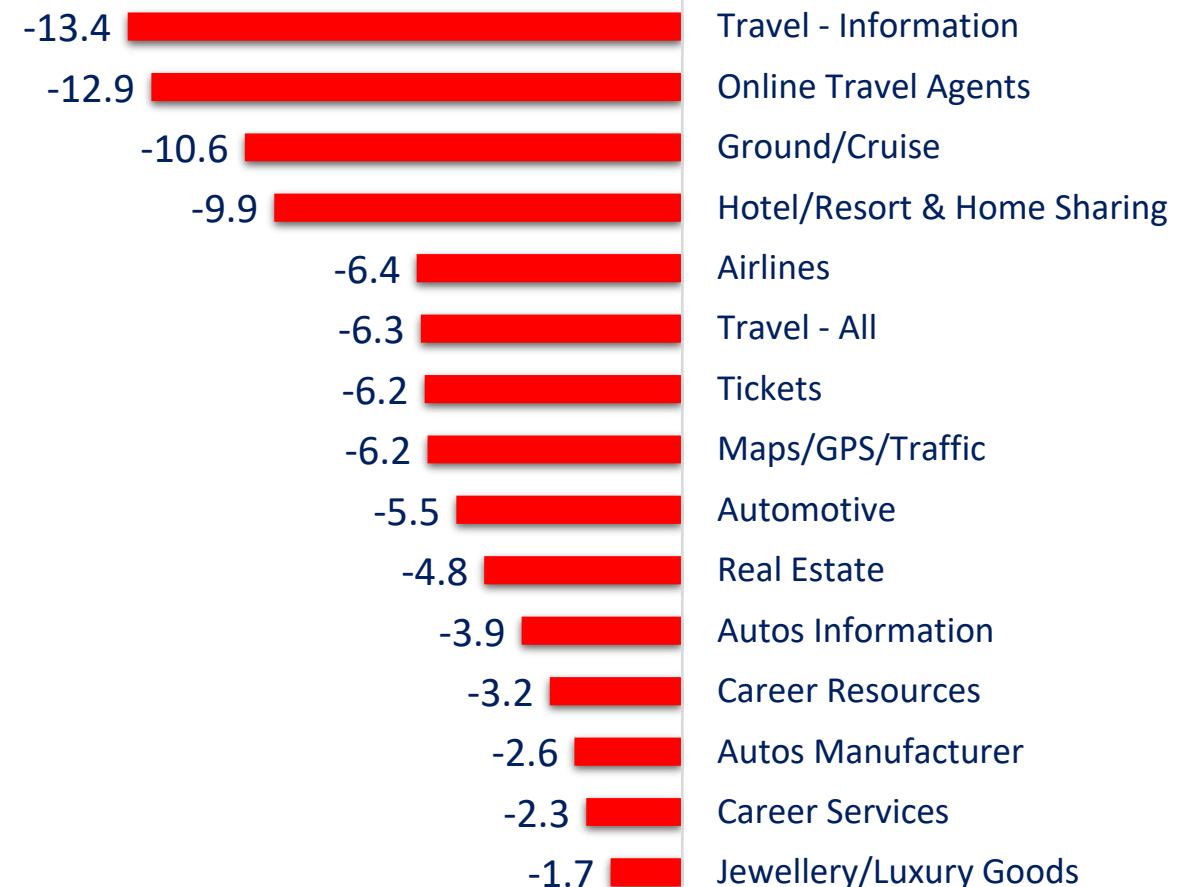
Category Unique Visitor Change: Jan-Apr 2020 (Millions)

News sub-categories added most visitors whilst Travel suffered

Unique Visitor Increase (Millions)



Unique Visitor Decrease (Millions)

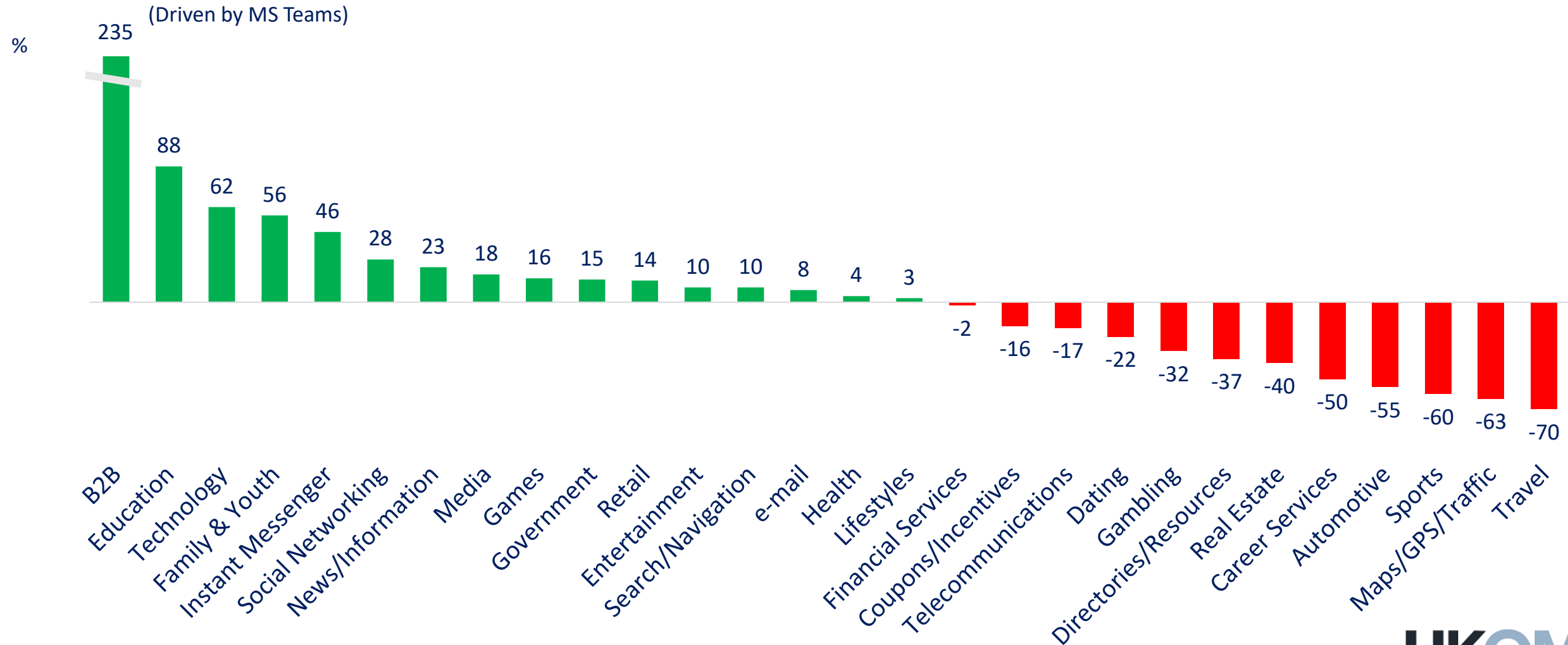


Source: Comscore MMX Multi-Platform, Adults 18+, Jan and April 2020, UK

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

Major Category Time Online Change: Jan-Apr 2020 (%)

Education, Social Media and News experienced Uplifts



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

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

Category Time Online Change: Jan-Apr 2020

Social Networking, IM and Entertainment Added Most Minutes

Total Minutes Increase (Millions)



Total Minutes Decrease (Millions)



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

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

Categories Negatively Impacted: Jan-Apr 2020



Major Growth Categories: Jan-Apr 2020



Retail: Food & Grocery

Key Changes: Jan-Apr 2020

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Food & Grocery Retail



Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
31.6m	69.8	+11%	+ 3.1m	+71%	+652m

- All supermarkets witnessed uplifts in UVs ranging from 22% for Waitrose to more than 70% for Iceland, Morrisons & Aldi. Tesco, the largest online supermarket in terms of unique visitors, increased its audience from 12.4m to 16m, a growth of 29%
- Food delivery services also benefitted from Covid. Deliveroo (+1.5m) & JustEat (+1.8m) were the major beneficiaries.
- FoodHub, Graze, Milk & More and BritishCornerShop.co.uk all added 0.3m UVs as people turned to smaller food stores to stock up. HotelChocolat was another growth brand – visitors grew from 0.4 to over 1.1 million between January and April.

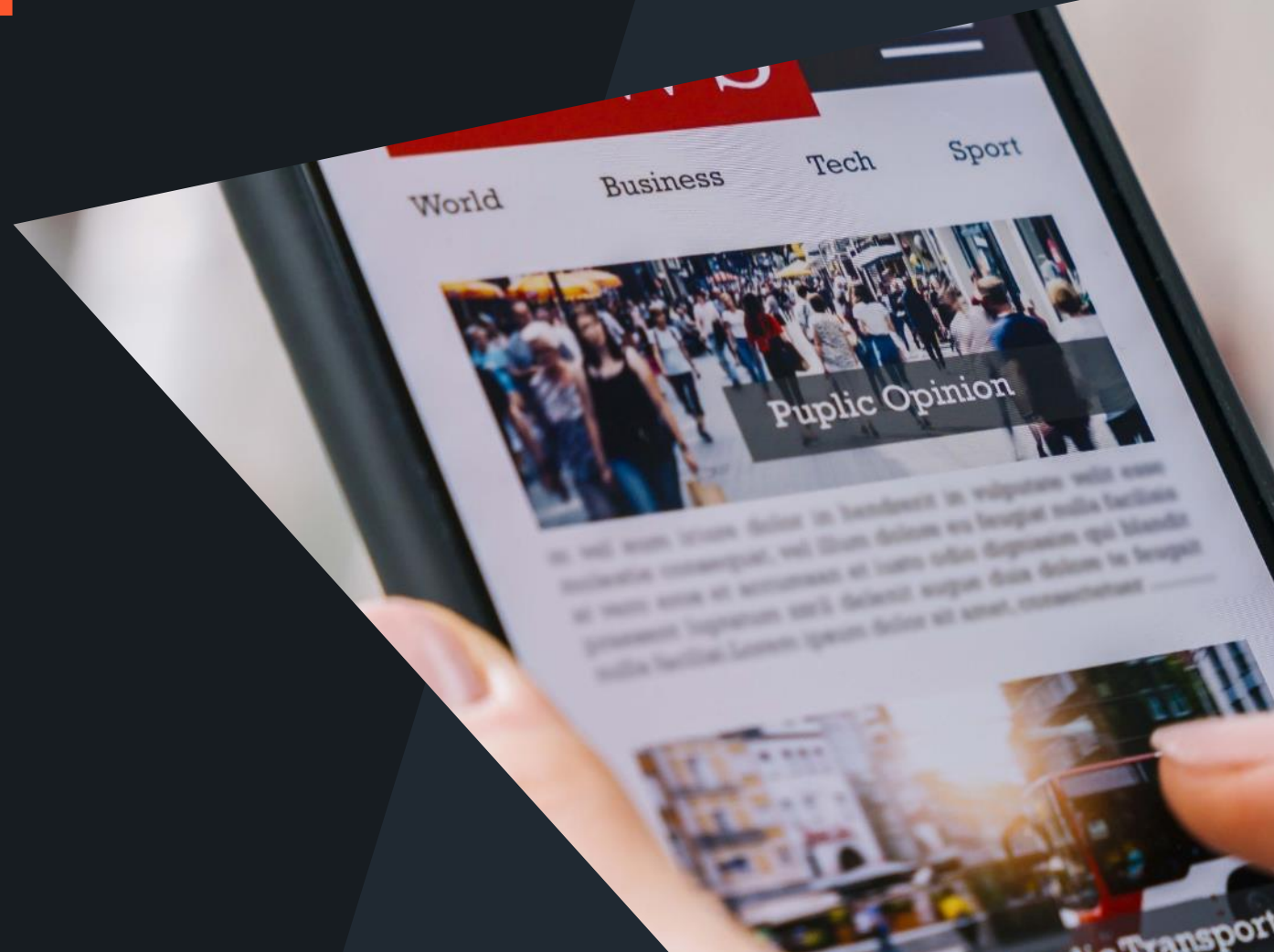
Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Apr 2020, UK

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

News & Information

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Key Changes: Jan-Apr 2020



News



	Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
All News/Info	45m	99.3	+1%	+0.4m	+23%	+3.9bn
Business/ Finance	38.1m	84	+25%	+7.5m	+35%	+218m
Technology News	39m	86.1	+25%	+7.8m	+31%	+95m
Politics	17.3m	38.3	+60%	+6.5m	+43%	+39m

- Overall, consumers are viewing a lot more news online. Total minutes are up by 3.9bn and ave/mins per visitor up by nearly an hour.
- The top 10 news properties all experienced uplifts in unique visitors, with Sky News (+12.6m), The Guardian (+10.7m) and BBC News* (+8.5m) the strongest performers.
- COVID has resulted in adults consuming content from a variety of sources across various news sectors – especially Business/Finance news, Technology News and Politics including US publications. For example, Wired added over 4m viewers, Reuters and Forbes both added over 3m, Tech Radar & CNet over 2m and Politico over 1 million.

Aggregator UV Apps



Apple News +1.2m



Upday +4.2m

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

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. * BBC News Channel selected rather than total BBC Property

Social Networking

Key Changes: Jan-Apr 2020

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Social Networking



Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
44.6m	98.3	+0.1%	+ 0.4m	+28%	+14.3bn

- Social Networking added more minutes than any other category between January and April 2020. Category minutes rocketed by 14.3 billion as visitors spent on average 5 hours more using the services.
- Facebook, the most popular social network with 94.5% online reach, generated an additional 4.8bn minutes (22% growth) or 8.6bn including Messenger.
- TikTok, owed by ByteDance was the strongest performer – it added 7.5m visitors, an increase of 153% and added 3.75bn minutes. 29% of online adults now use the service.
- Change.org also outperformed the sector, up from 5.1m visitors to over 9m - a growth of 76%.

IM and Video Chat

Key Changes: Jan-Apr 2020

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Instant Messenger & Video Chat*



Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth*	Mins Growth
37.1m	81.8	+4%	+ 1.3m	+46%	+7.8bn

- An additional 7.8 billion minutes were spent using IM services between Jan and April, a growth of 46%. That's an increase of 190 minutes on average per user. WhatsApp and Facebook Messenger each increased minutes by 3.7bn.
- WhatsApp, the market leader, grew UVs by 2.6 million over the period, an increase of 9%. It now has 68% reach among adults.
- If video chat/conferencing services were added to the category, the growth would be significantly more as lockdown led to a huge increase in usage – particularly of Zoom, Microsoft Teams and Houseparty.

	UVs Growth	Additional Minutes
ZOOM	+12.3m	+555m
Microsoft Teams	+3.5m	+592m
Houseparty	+3.8m	+253m

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



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MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. *The total table is the IM category. Video Chat is not a Comscore category. - the time spent for Zoom, Teams and Houseparty is not included in the totals

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Health

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Key Changes: Jan-Apr 2020



Health



	Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
Health	42.1m	93	+7%	+ 2.8m	+4%	+136m
Retail: Healthcare	10.2m	22.5	+17%	+1.5m	+40%	+18m

- Many online chemists had additional visitors as people sought to get prescriptions and health products online – Lloyds Pharmacy, Chemist-4-U and Pharmacy2U all increased visitors by over 200K to more than ½ a million.
- In terms of Health Information, 40% of adults visited the NHS online in April: an increase of 2.5m since January but April reach was down 10% compared to March. This was a similar story with The WHO site - after adding 3.3m visitors between Jan and March, audience declined by 1.5m in April. The Covid Symptom Tracker app was used by 1.9 million adults in April.
- Whilst in March there was a big focus on Health, between March and April there was a rise of 1.7m visitors using Diet and Fitness sites/apps such as Fitbit and Strava as people looked to exercise.

Games

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Key Changes: Jan-Apr 2020



Games



Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
39.6m	87.5	+8%	+ 3m	+16%	+4.7bn

- Gaming is a high reach, high engagement activity which saw time online increase by 4.6bn minutes between Jan and April.
- Twitch, the live streaming gaming platform was a major contributor to the increase in time online – minutes on the service doubled from 0.82bn to 1.6bn as unique visitors grew by almost 2 million. Much of the increase came from March to April – likely a result of people, including students being at home more.
- Most of the major gaming properties witnessed increases in visitors especially Fandom (+42%), GameSpot (+75%) and Future Games (+62%). In terms of mobile gaming apps, new games Scrabble Go and Go Knots 3D both had almost 1 million users by the end of April.

Home

Key Changes: Jan-Apr 2020

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Home



	Total Unique Visitors	Reach %	UVs % Growth	UVs Growth	Mins % Growth	Mins Growth
Lifestyle: Home	16.7m	36.9	+28%	+3.7m	+64%	+41m
Retail: Home	22.5m	49.7	+14%	+2.7m	+56%	+167m

- In April, DIY and home furnishing online stores experienced uplifts in unique visitors and minutes as people turned their attention to improving their surroundings. Between Jan and April, Wickes & Homebase both added over 2.5m unique visitors whilst Wayfair had an additional 3.2m. Gardening stores also performed well with Primrose.co.uk being the most successful, up from 0.2 to 1.5m.
- Gardening websites also dominated the list of home lifestyle sites which grew most between Jan and April. Gardeners World (+2.4m, +516%), Thompson Morgan (+1.3m, +309%) and RHS.Org.UK (+1m, +230%) all grew in popularity among adults looking for some gardening inspiration.

Entertainment

Key Changes: Jan-Apr 2020

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Entertainment



Total Unique Visitors	Reach %	UV % Growth	UVs Growth	Mins % Growth	Mins Growth
44.9m	99.1	0	+ 2.9m	+10%	+5.9bn

- Many entertainment sites added unique visitors between Jan and Apr. LadBible (+4.9m, +50%) was a top performer and the showbiz sections of the daily newspapers including the Mail (+3m) and The Sun (+2.3m) also grew. IMDB appeared to benefit from people being at home more with a 2.8m increase in UVs.
- In terms of time online, it's mainly video and audio services which drive most of the increase, particularly apps. The YouTube app alone added 4.8bn minutes, an increase of 15% - it's 33 million users spent an additional 111 minutes on the service. Netflix (+13%), Amazon Prime Video (+47%), BBC iPlayer (24%) apps also added minutes.
- The Apple Music app attracted an additional 1.6 million UVs over the period, an increase of 25% to 8m.

Other Growth Categories & Brands

Key Changes: Jan-Apr 2020

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Education, Government & Food



Total Unique Visitors	Reach %	UV % Growth	UV Growth	Mins % Growth	Mins Growth
26.3m	58.1	+6%	+ 1.5m	+88%	+744m

Education

BBC Bitesize launched online lessons in April. UVs grew from 1.6m to >3m. Guardian Education & Twinkl both added >1m UVs due to home schooling



Total Unique Visitors	Reach %	UV % Growth	UV Growth	Mins % Growth	Mins Growth
31.6m	69.8	+8%	+ 2.2m	+15%	+41m

Government

Government UVs were up 8% Jan-Apr but Mar was the peak month. www.gov.uk added 4.2m to 24.1m but was down from 29.2m in March.



Total Unique Visitors	Reach %	UV % Growth	UV Growth	Mins % Growth	Mins Growth
34.1m	75.3	+19%	+ 5.4m	+56%	+205m

Lifestyle: Food

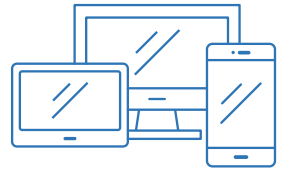
Home cooking & baking became a greater focus in April. BBC Good Food increased UVs by 70% from 13.1m to 22.2m

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

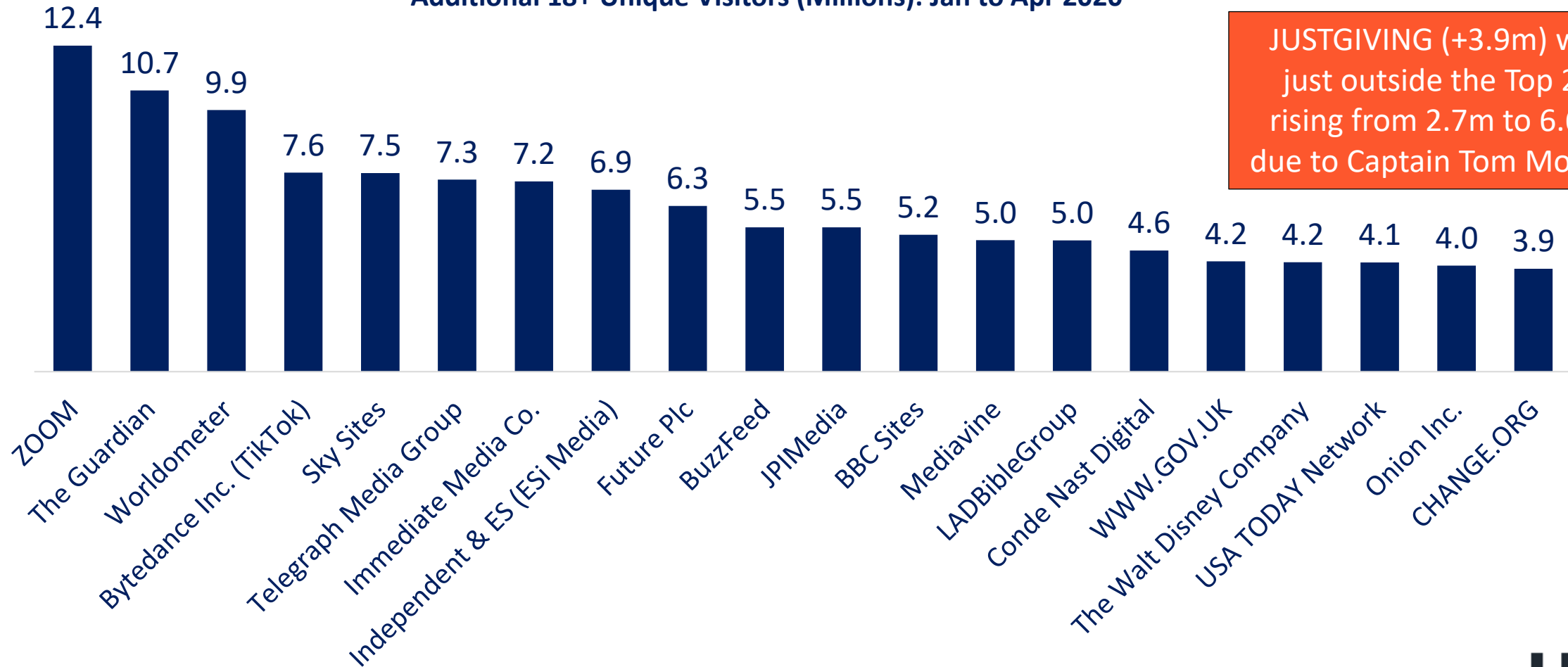
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

Properties adding MOST Unique Visitors: Jan-Apr 2020

News Organisations dominate the top 20 Growth Properties



Additional 18+ Unique Visitors (Millions): Jan to Apr 2020



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

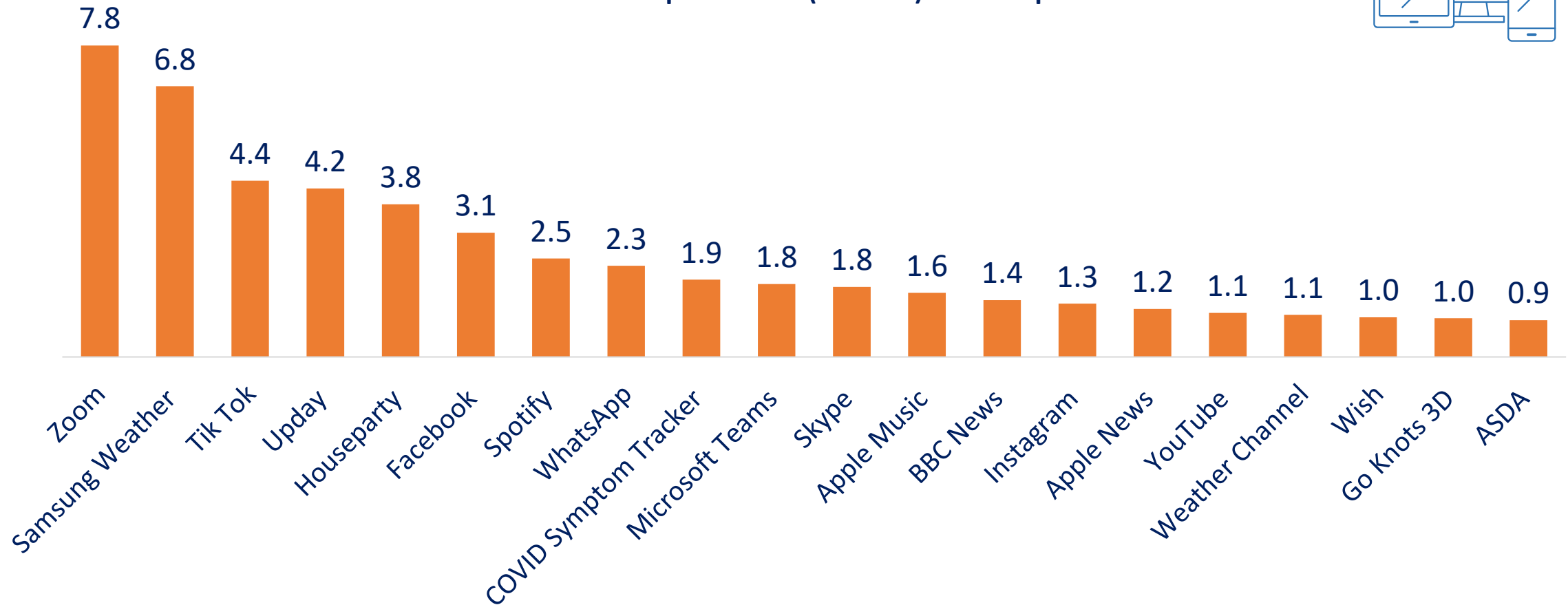
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*Worldometers.info web domain has replaced the 'FreeStar' property in this analysis as Worldometers was driving the growth

Mobile Apps adding MOST Unique Visitors: Jan-Apr 2020

Social Media Apps witnessed largest audience uplifts





Additional 18+ Unique Visitors (Millions): Jan to Apr 2020




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

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




Q4 2019 UK Digital Market Overview report

Welcome to UKOM's Digital Market Overview for December 2019. Using UKOM approved Comscore data, the DMO shares insights into what the UK Population is doing online by providing a top-line snapshot of audience behaviour each





Q3 2019 UK Digital Market Overview report

Digital Market Overview for September 2019. Key insights include: mobile's share of time online continues to grow, up from 78% in June to 81% in September – driven by smartphones (up from 67% to 71%). Online adults spent on average 3hrs 34mins per




Q2 2019 UK Digital Market Overview report

Digital Market Overview for June 2019. Using UKOM approved Comscore data, the DMO shares insights into what the UK Population is doing online by providing a top-line snapshot of audience behaviour each quarter.

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Insights



WhatsApp's UK Audience

Facebook recently revealed that on New Year's Eve 100 billion messages were sent worldwide on WhatsApp with UK users sending over 900 million of them. UKOM looks at the popularity and growth of WhatsApp among different demographics in the UK over the last year.


29.01.2020



Fashion Retailers

In July 2019, 27 million UK adults visited clothing retailers online and every month Comscore reports on over 300 properties which are classified under the category 'Retail – Apparel'. To coincide with London Fashion week, UKOM explores usage of the category and identifies winners and losers over the last year.

16.09.2019



New Mobile Finance Apps

Each month, UKOM's partner, Comscore, reports usage data for nearly 2800 mobile apps, over 50 of which are in the financial services category.

25.06.2019

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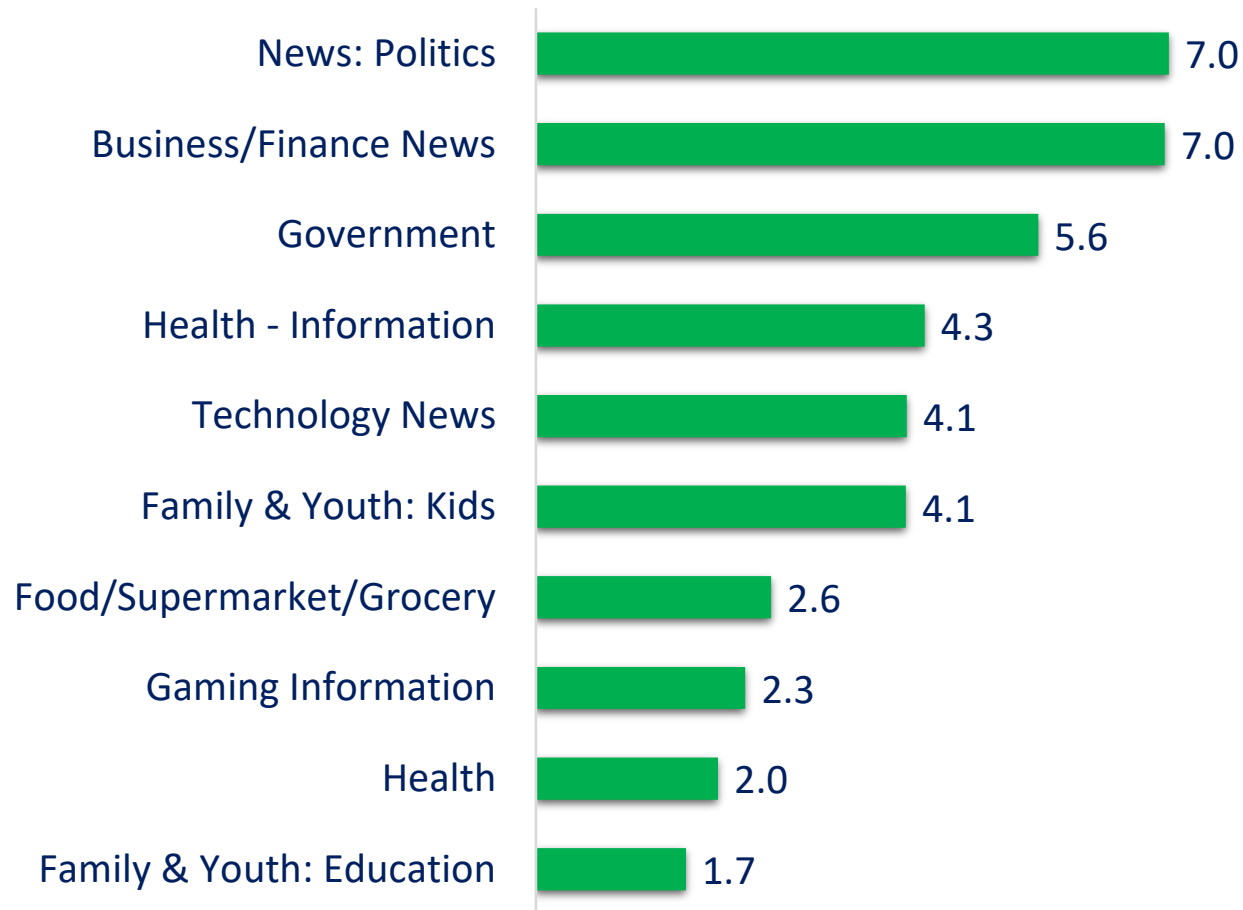
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Email us at: insights@ukom.uk.net

Appendix

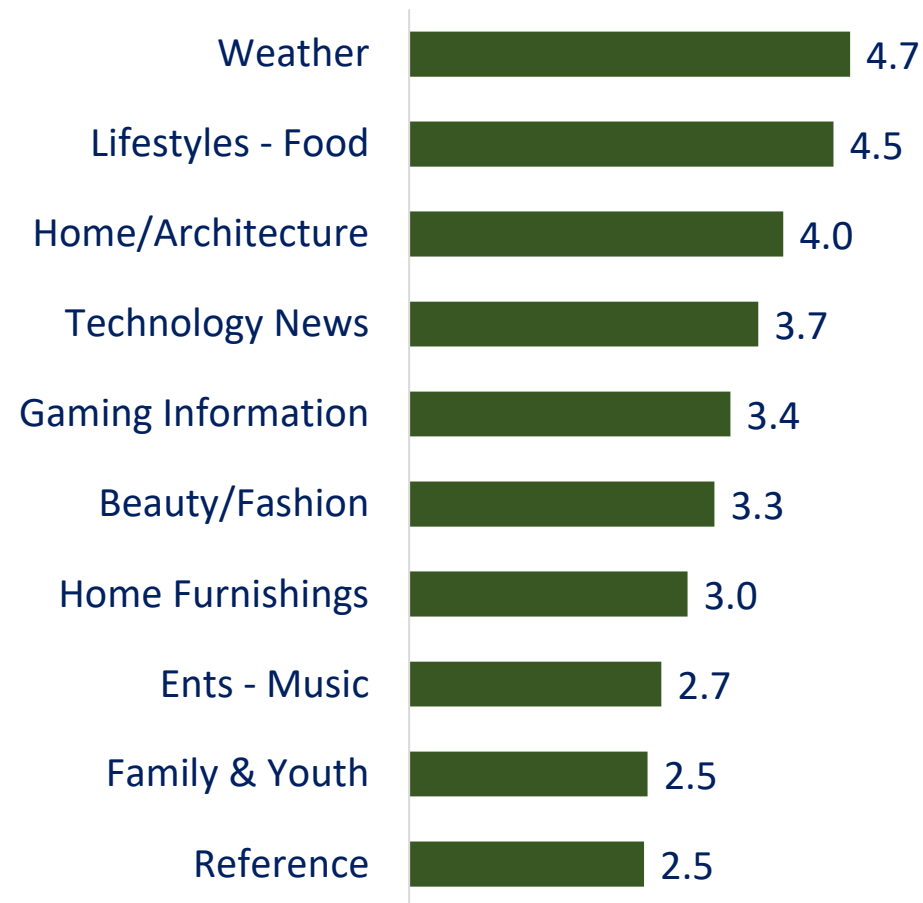
Categories which Added Most Visitors: Jan-Mar v Mar-Apr

Attention on the Home & Garden follows early Grocery & Health Focus

Unique Visitor Increase (Millions): Jan to Mar



Unique Visitor Increase (Millions) : Mar to Apr



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

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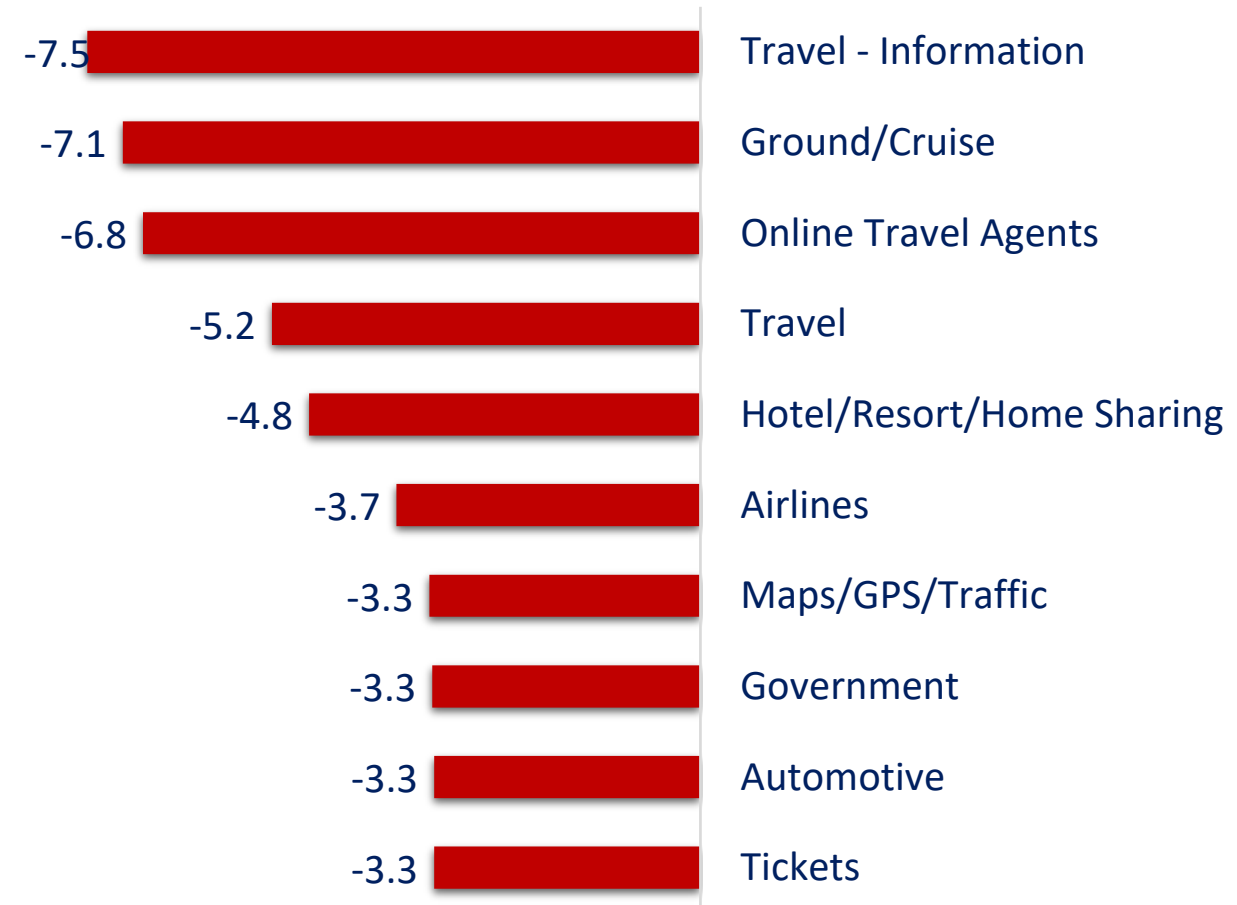
Categories which Lost Most Visitors: Jan-Mar v Mar-Apr

8 of the top 10 biggest 'losers' in March, also suffered most in April

Unique Visitor Decrease (Millions) Jan-Mar 2020



Unique Visitor Decrease (Millions) Mar-Apr 2020

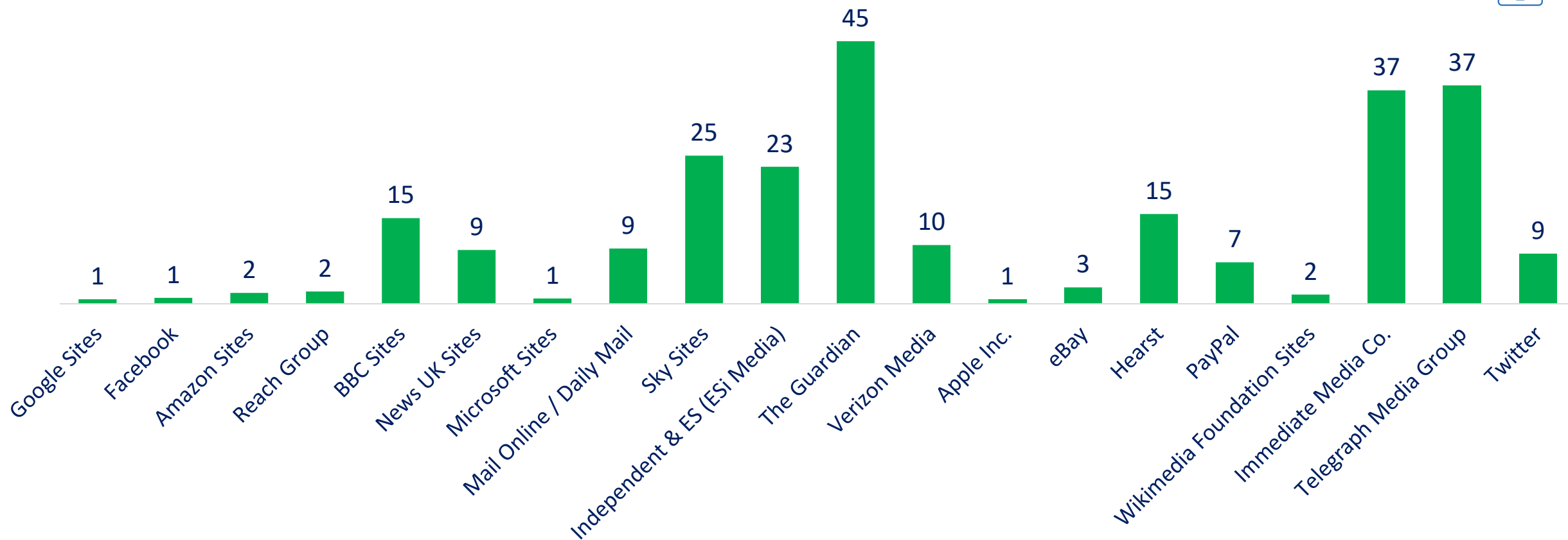


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Apr 2020, UK

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Top 20 'UV' Properties: Unique Visitor Change Jan-Apr 2020

Unique Visitor % Change: Apr 20 v Jan 20

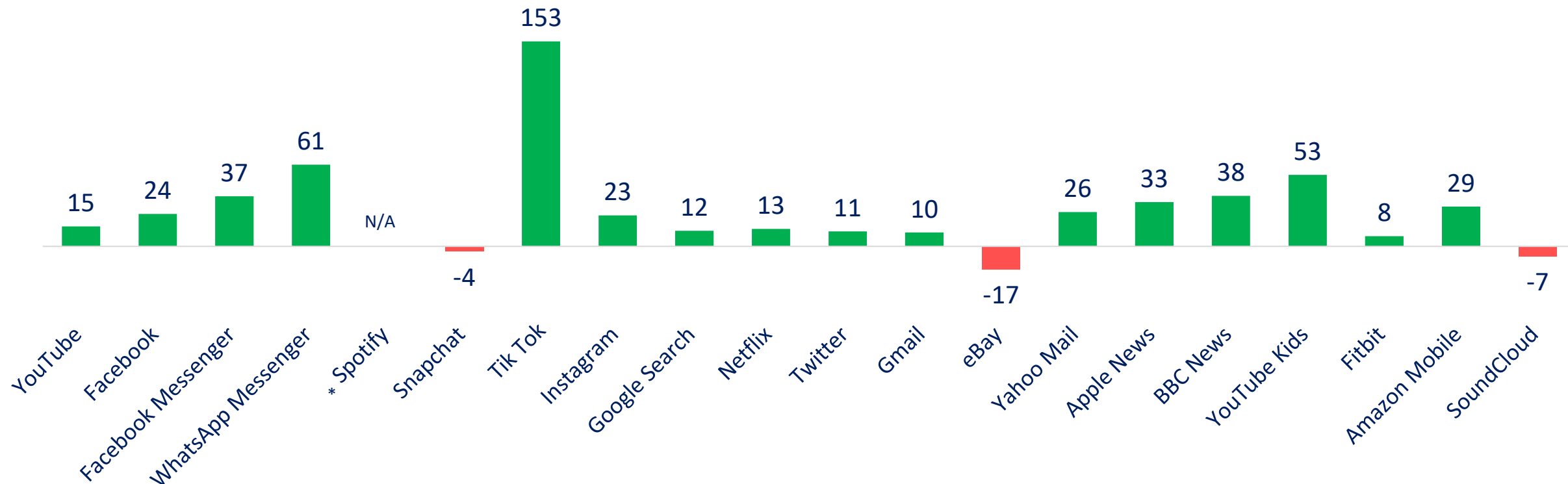


Source: Comscore MMX Multi-Platform, Adults 18+, Jan & Apr 2020, UK

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Top 20 'Time Spent' Mobile Apps: Mins % Change Jan-Apr 2020

Minutes % Change: Mar 20 v Jan 20



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

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. *Due to a tagging problem on Android and iOS platforms, Spotify was under-reported in January 2020

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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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/