

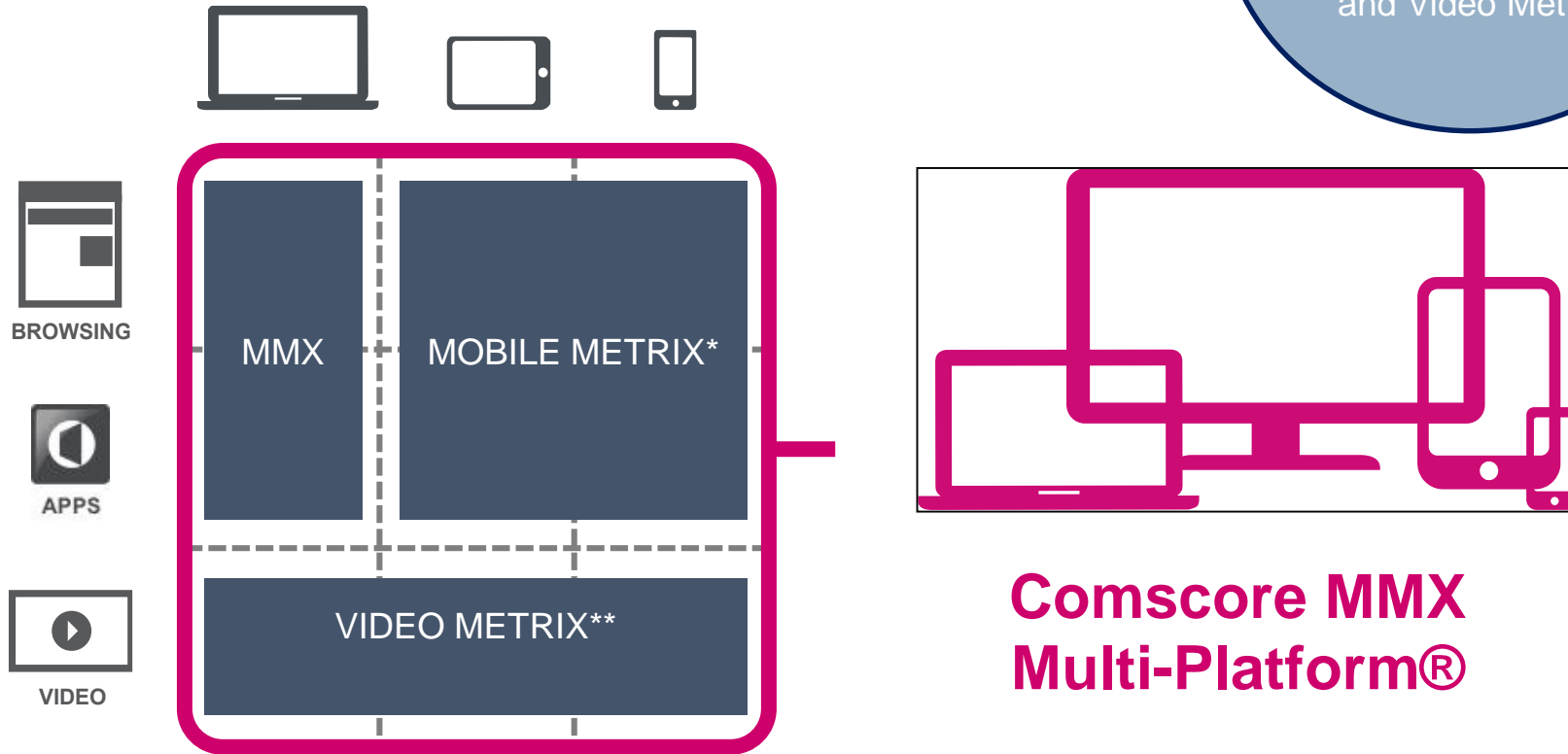
UK Digital Market Overview December 2019



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



*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

October 2019 Methodology Update

New developments in UK online audience measurement and changes in online universes

Effective with **October 2019 data** released in November 2019, 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](#).

The enhancements include:

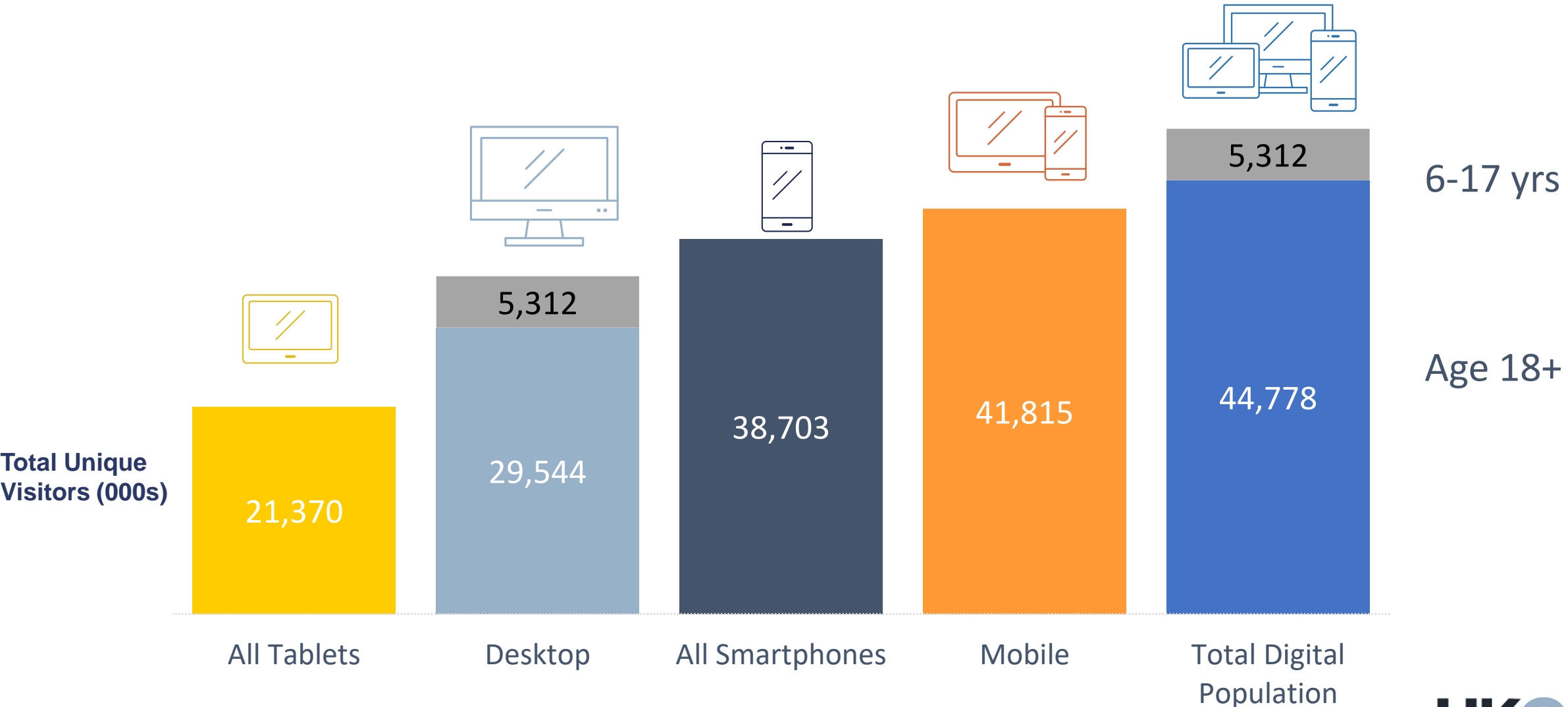
- Improved Android Collection/Reporting (MoMX/MMX MP)
- Improved iOS Collection/Reporting (MoMX/MMX MP)
- Updated Mobile Universe Estimate* (MoMX/MMX MP)
- Android Duration Methodology Enhancements (MoMX/MMX MP)
- Minor Mobile iOS Panel Processing Updates (MoMX/MMX MP)

*The updates to the mobile universe estimates results in a market share shift between iOS and Android within the total mobile population. These updates are being made to better align digital universe estimates with expectations from the market in anticipation of future cross-platform product offerings. UK universe estimates are transitioning from being informed by MobiLens to being informed by PAMCo (the same source used by all other Comscore digital products).



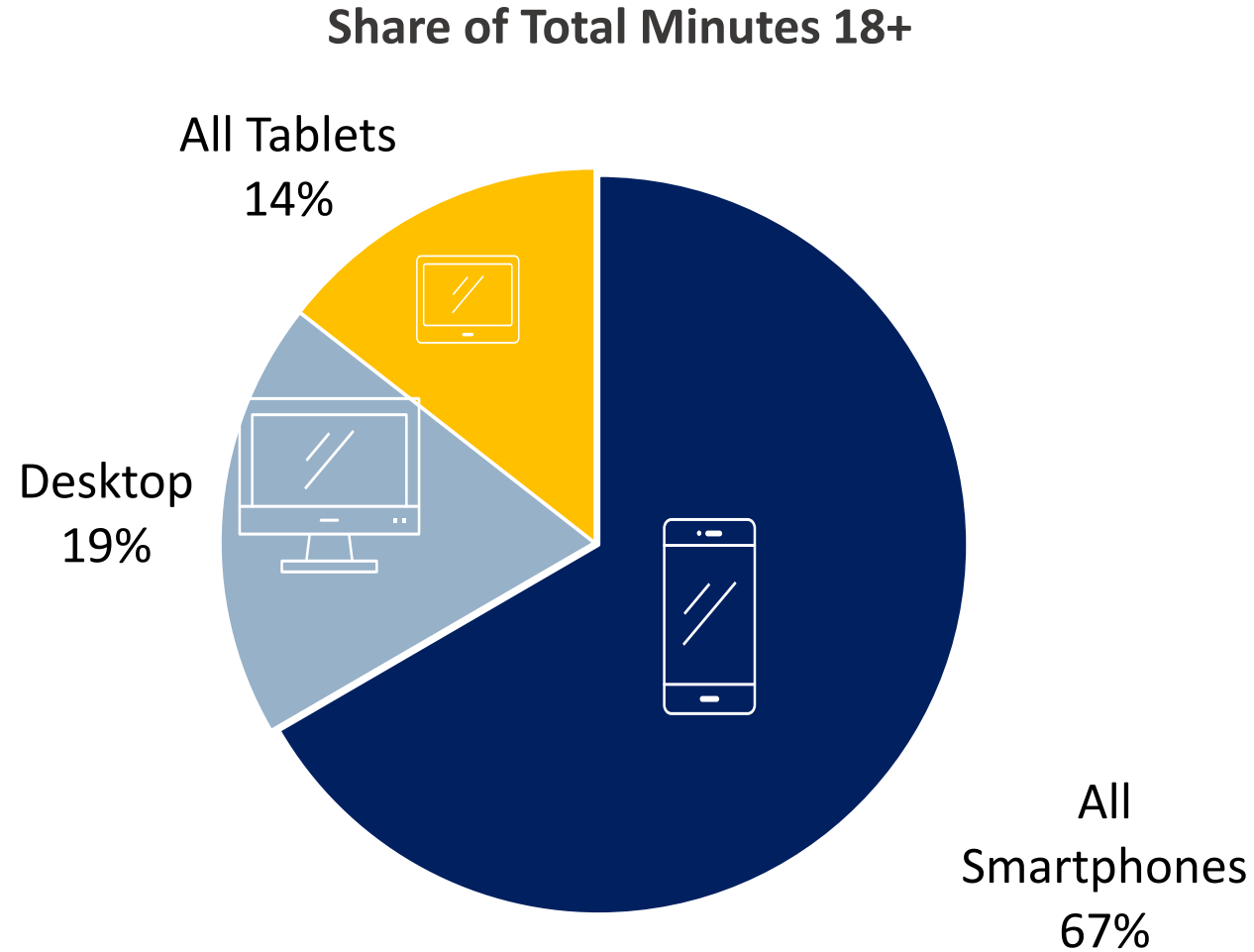
Usage by Platform

Breakdown of Digital Unique Visitors by Platform



Share of Minutes by Platform

Mobile Devices now account for **81%** of all adult online minutes



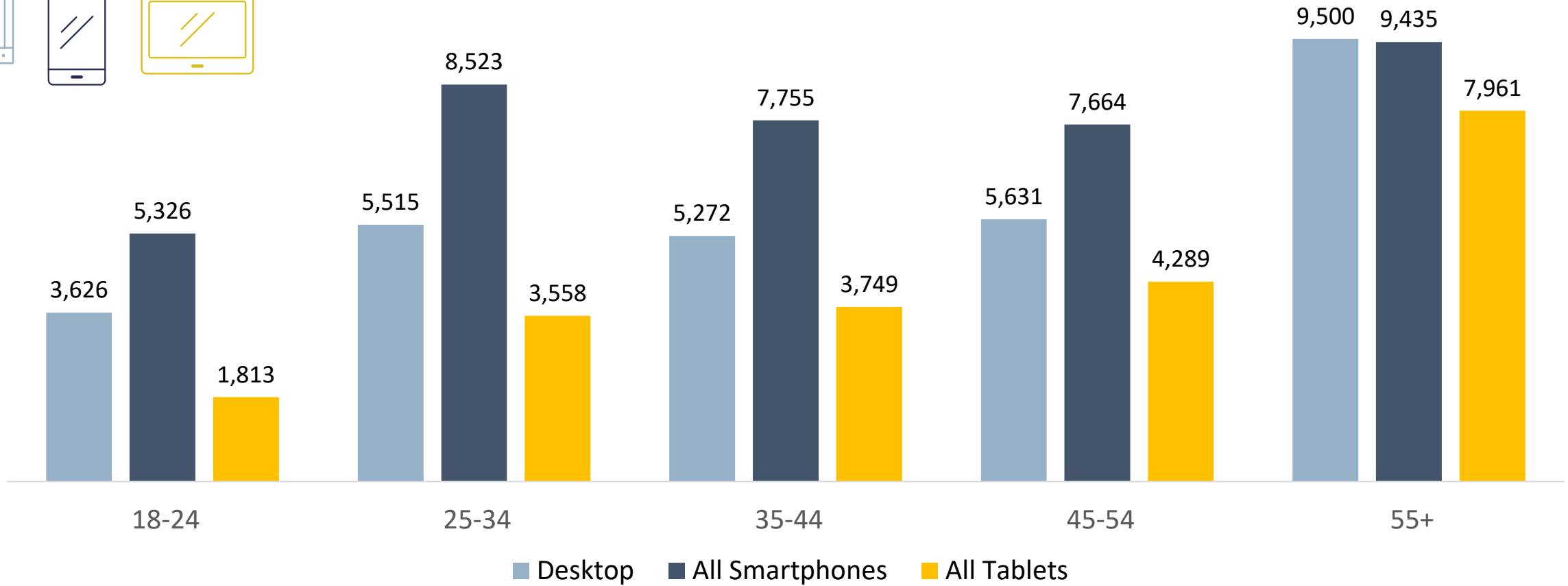
Source: Comscore MMX Multi-Platform, Adults 18+, December 2019, UK
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps

*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

Platform Unique Visitors by Age



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

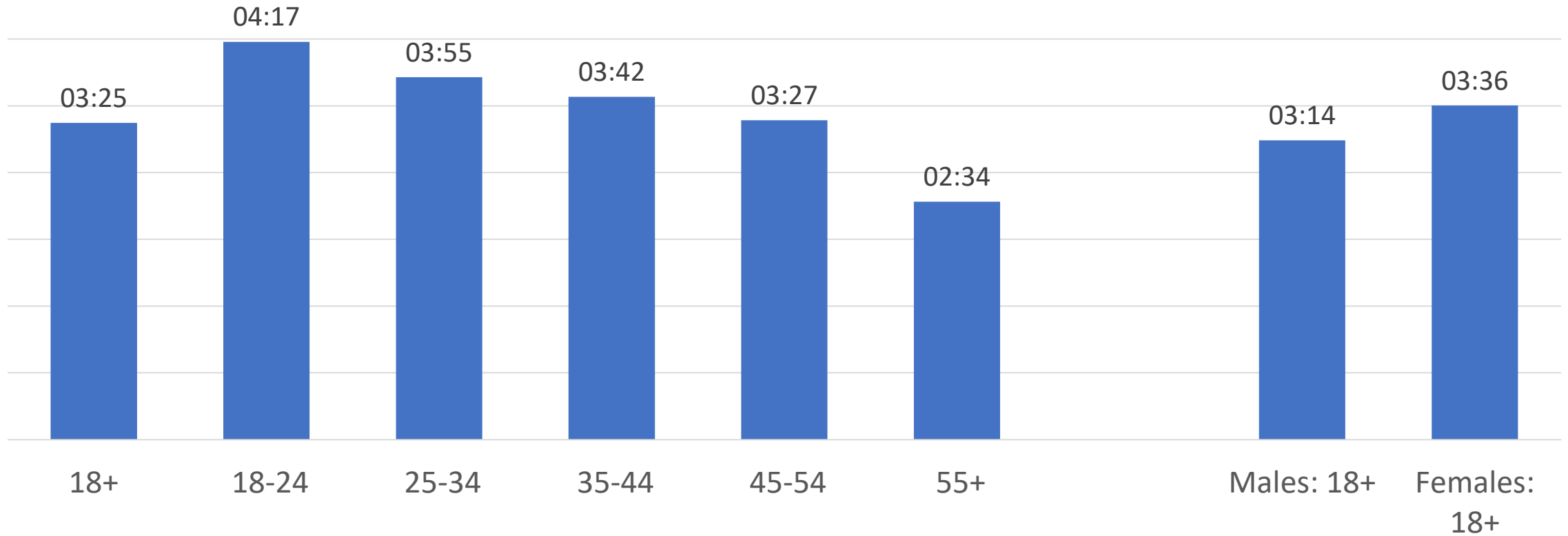


Average Time Spent Online Per Day by Age & Gender

Average time spent online decreases with increasing age



Average Time Spent (Hrs:Mins) Per day by Age and Gender – Dec 2019

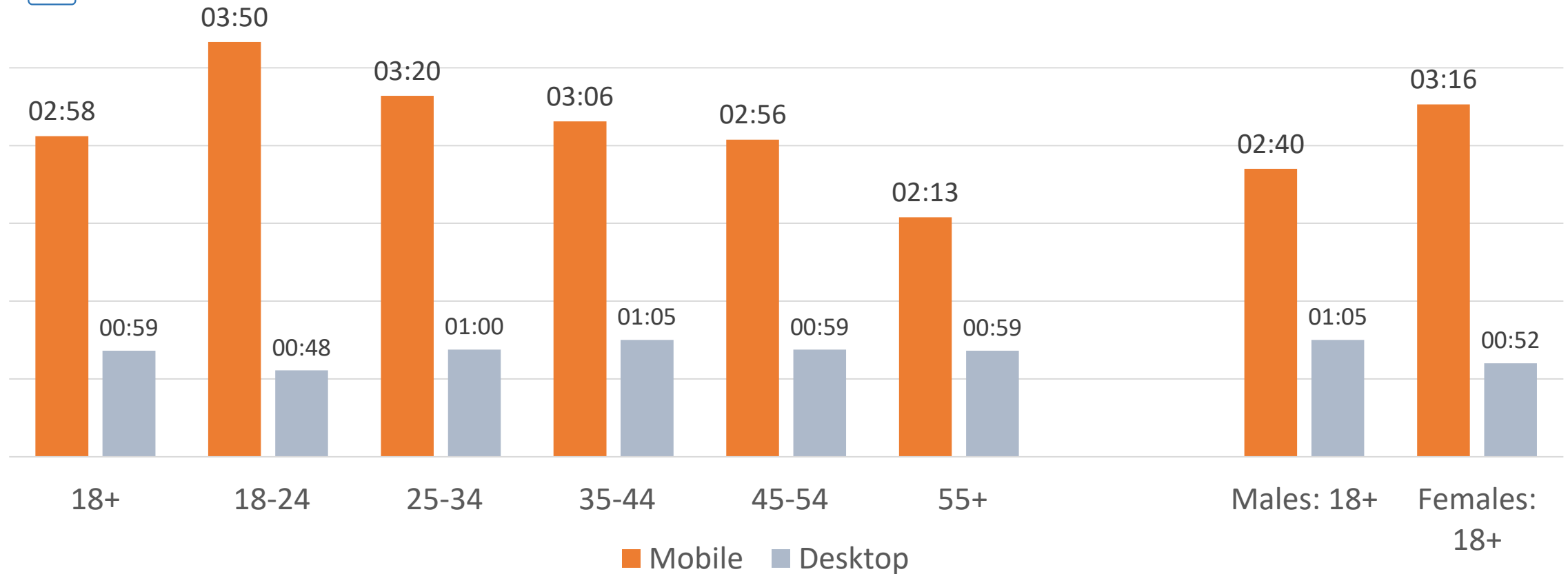


Average Time Spent Online Per Day by Age & Gender

Adults spend 3x longer on mobile devices than desktops each month

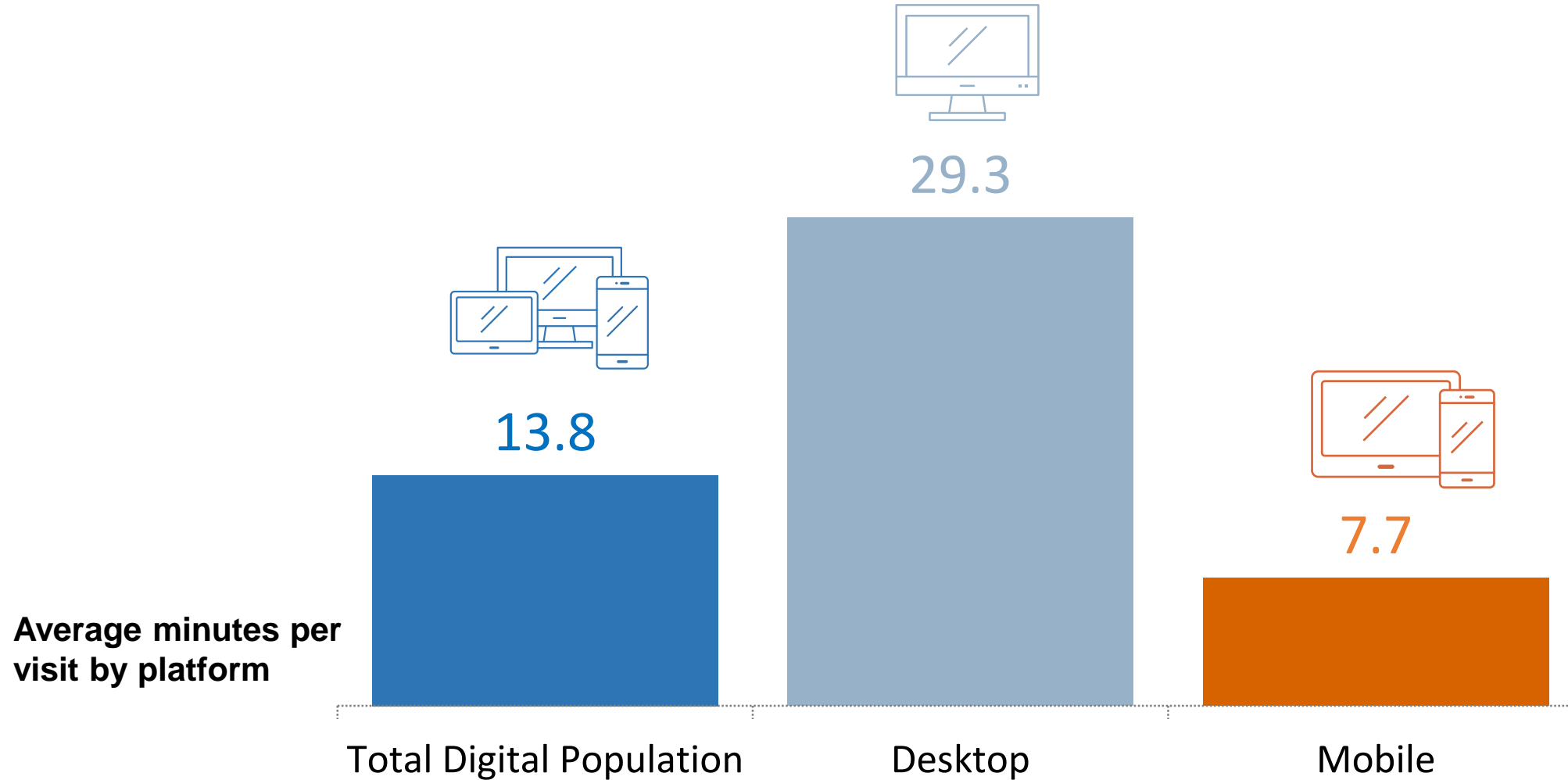


Average Time Spent (Hrs:Mins) Per day by Age and Gender – Dec 2019



Average Minutes per Visit by Platform

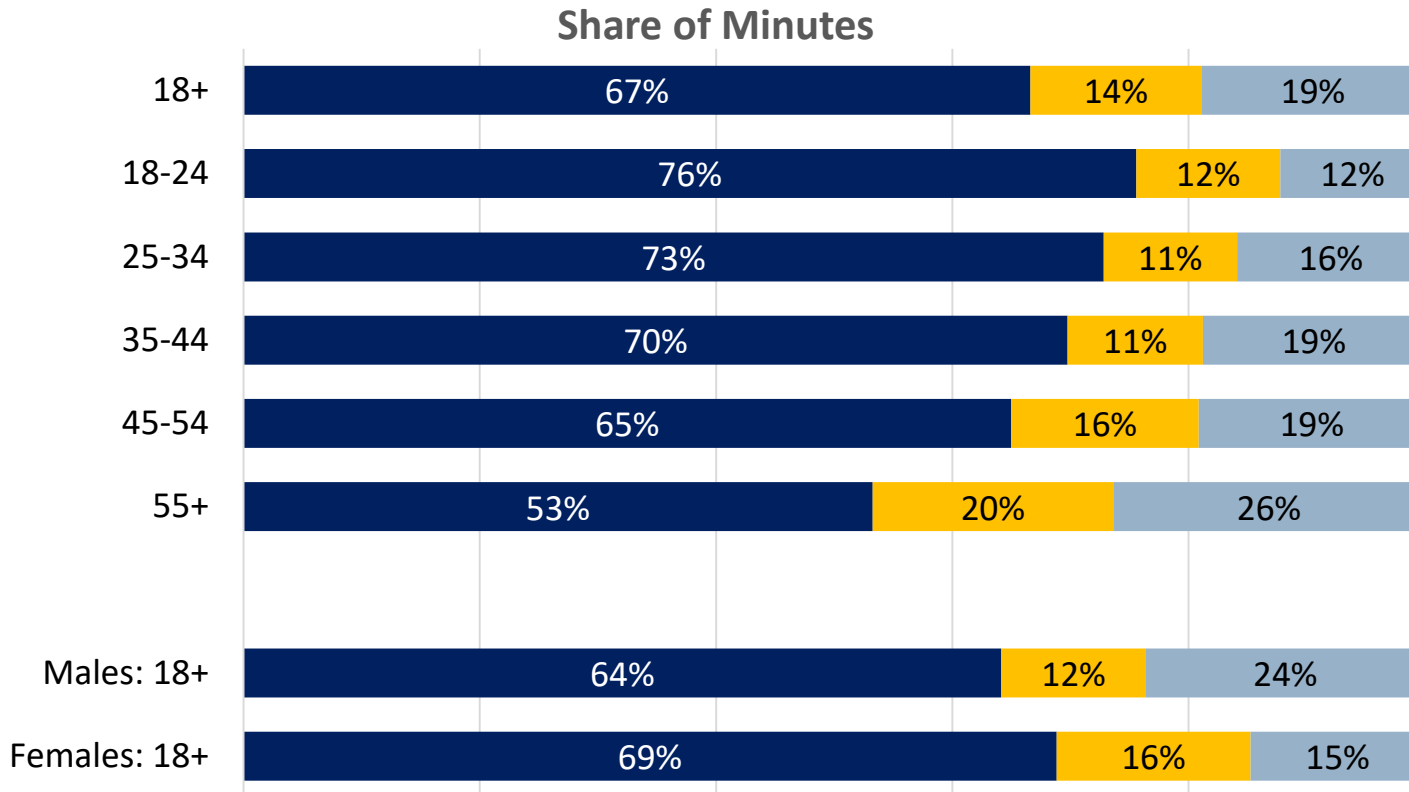
Mobile visits are **shorter**



Average minutes per visit by platform

Platform Share of Minutes by Age & Gender

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



■ All Smartphones ■ All Tablets ■ Desktop



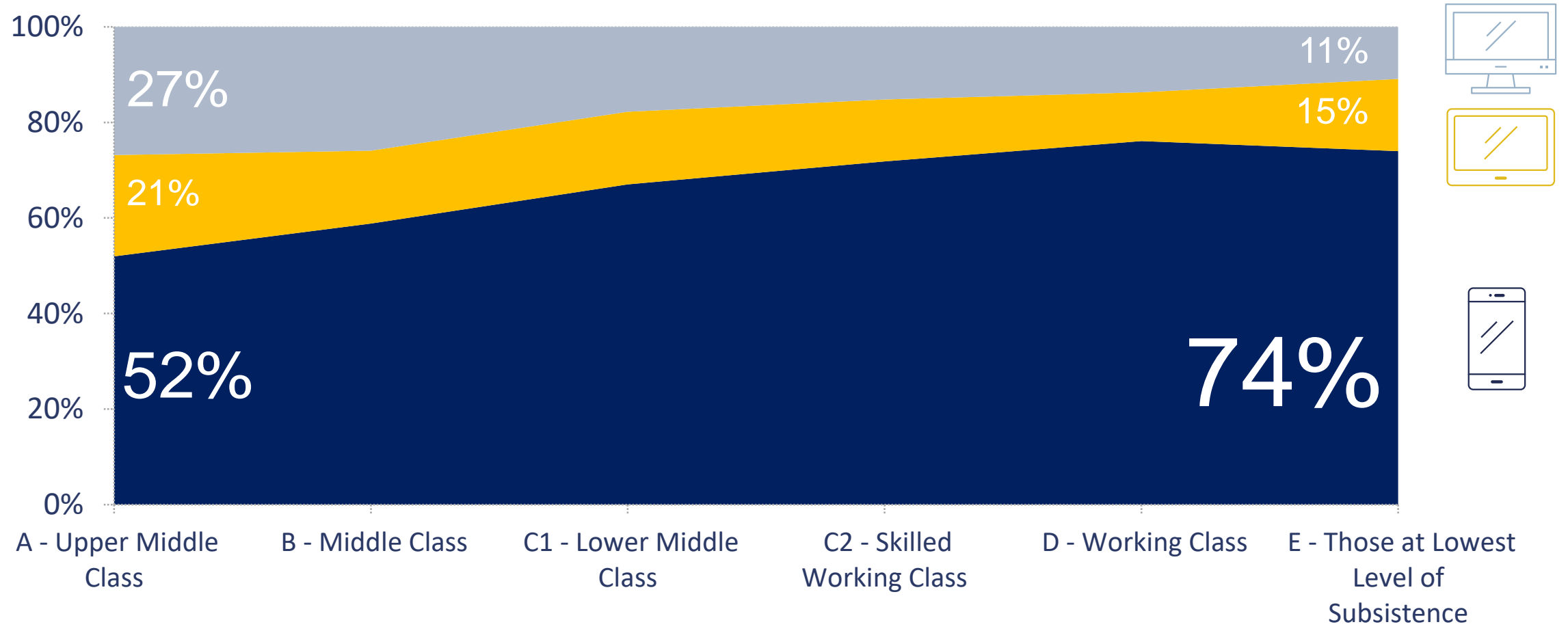
Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 85% of their time online on mobile devices compared to only 76% for males.

Platform Share of Time Online by Social Grade

Smartphone share increases as social grade decreases

Platform Share of Minutes by Social Grade

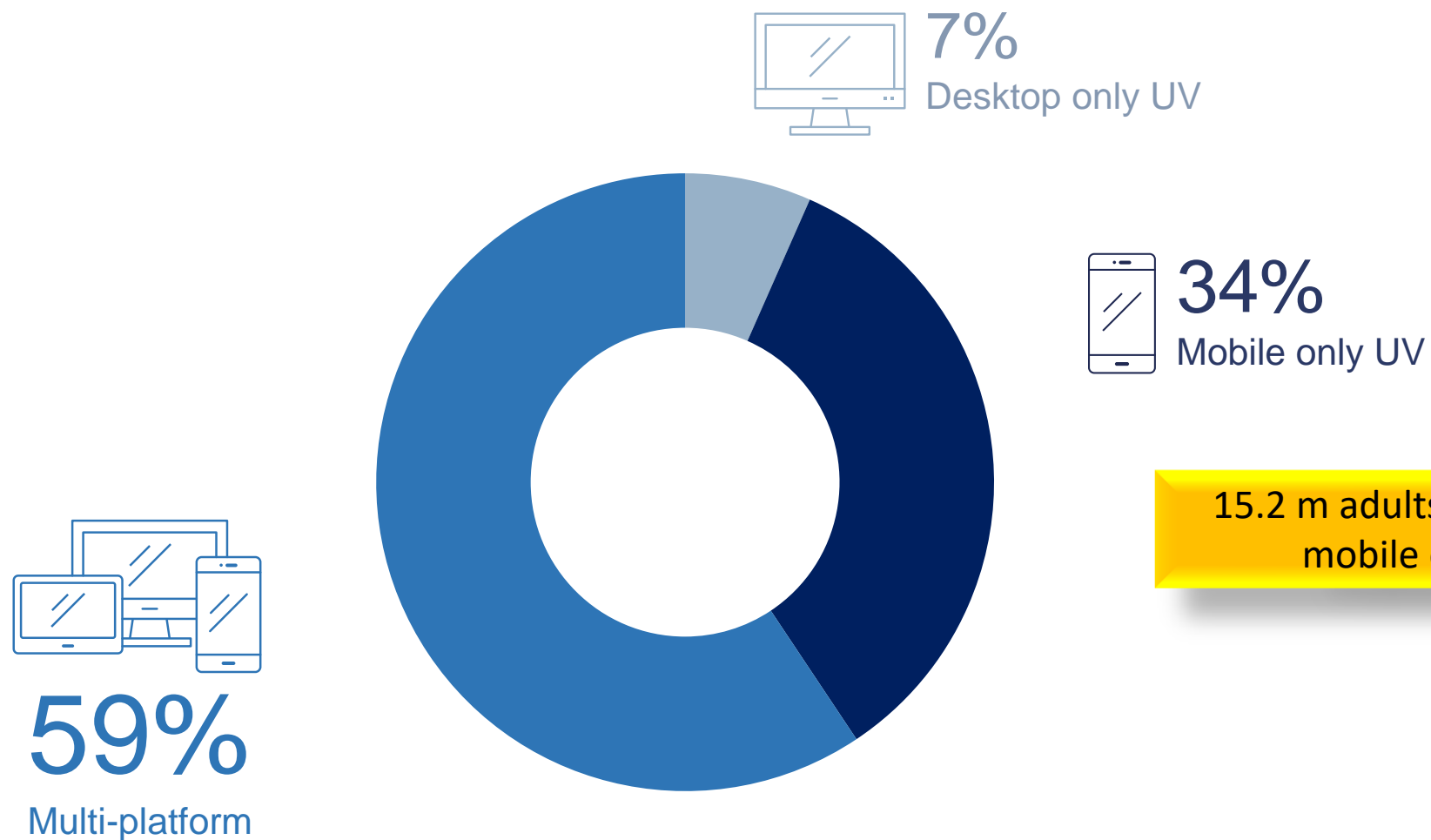




Multi-Platform Usage

Multi-Platform Usage

Over a third of UK Adults are now Mobile Only

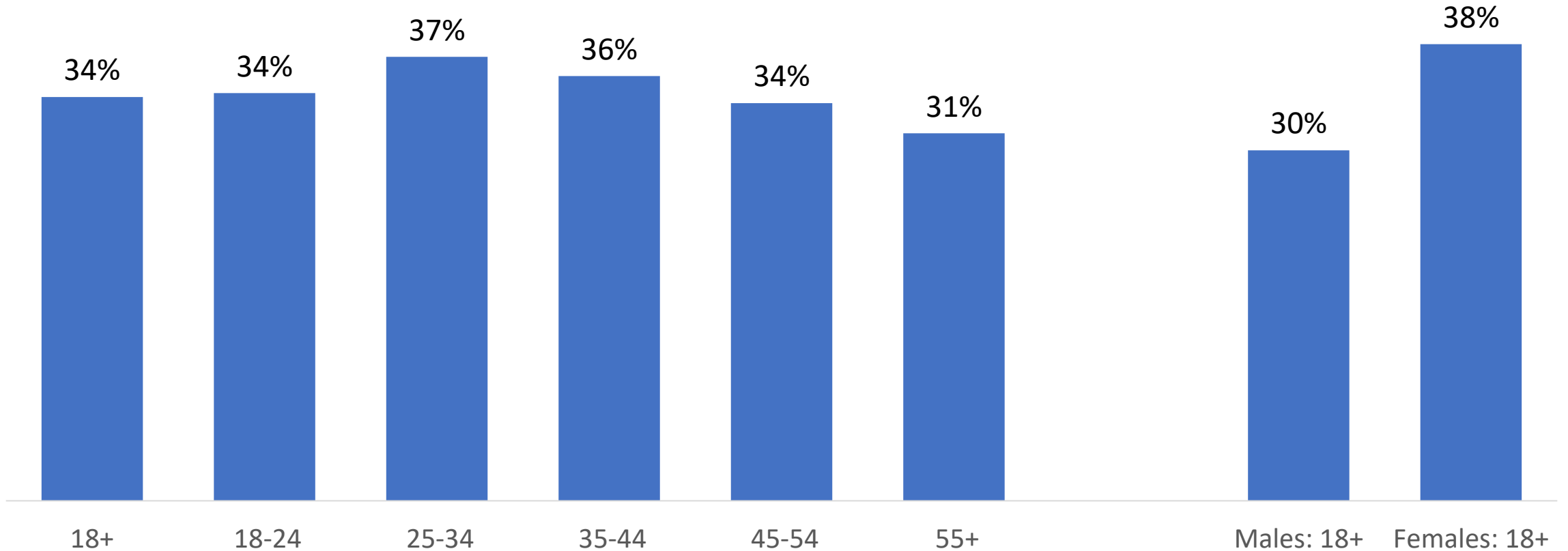


15.2 m adults are now mobile only

'Mobile Only' Audience Reach by Age & Gender

Females are more likely to be 'mobile only' than males

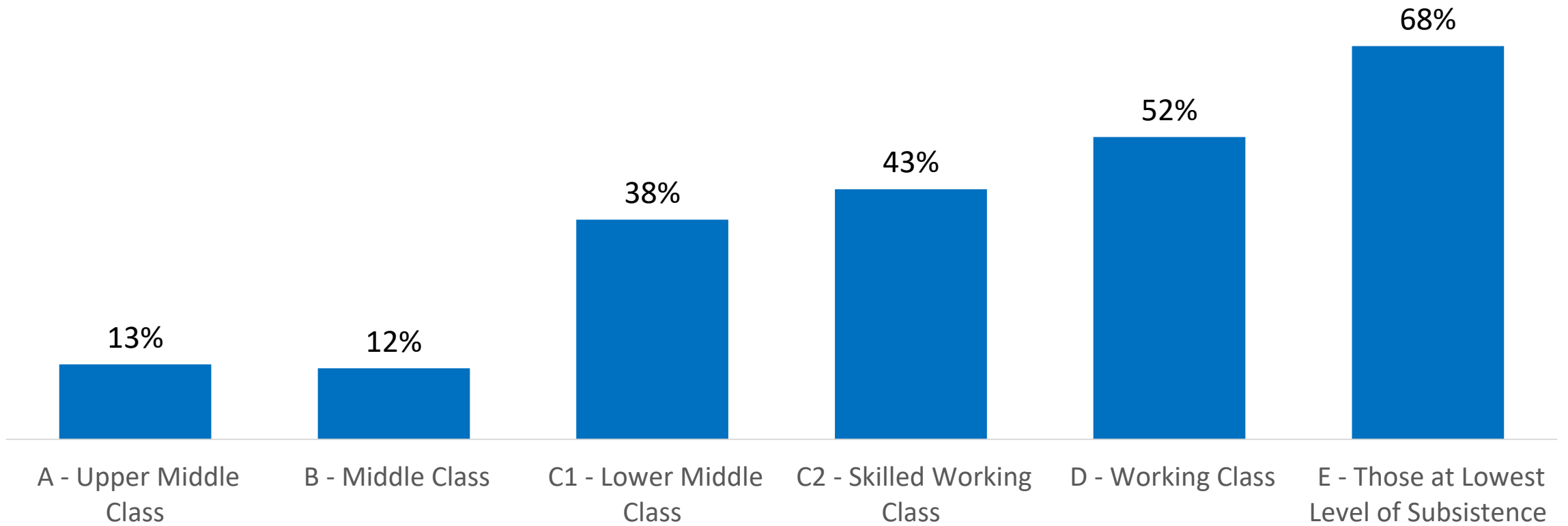
Mobile Only Reach (%) by Age and Gender



'Mobile Only' Audience Reach by Social grade

Lower social grades are more likely to be 'Mobile Only'

Mobile Only Reach (%) by Social Grade





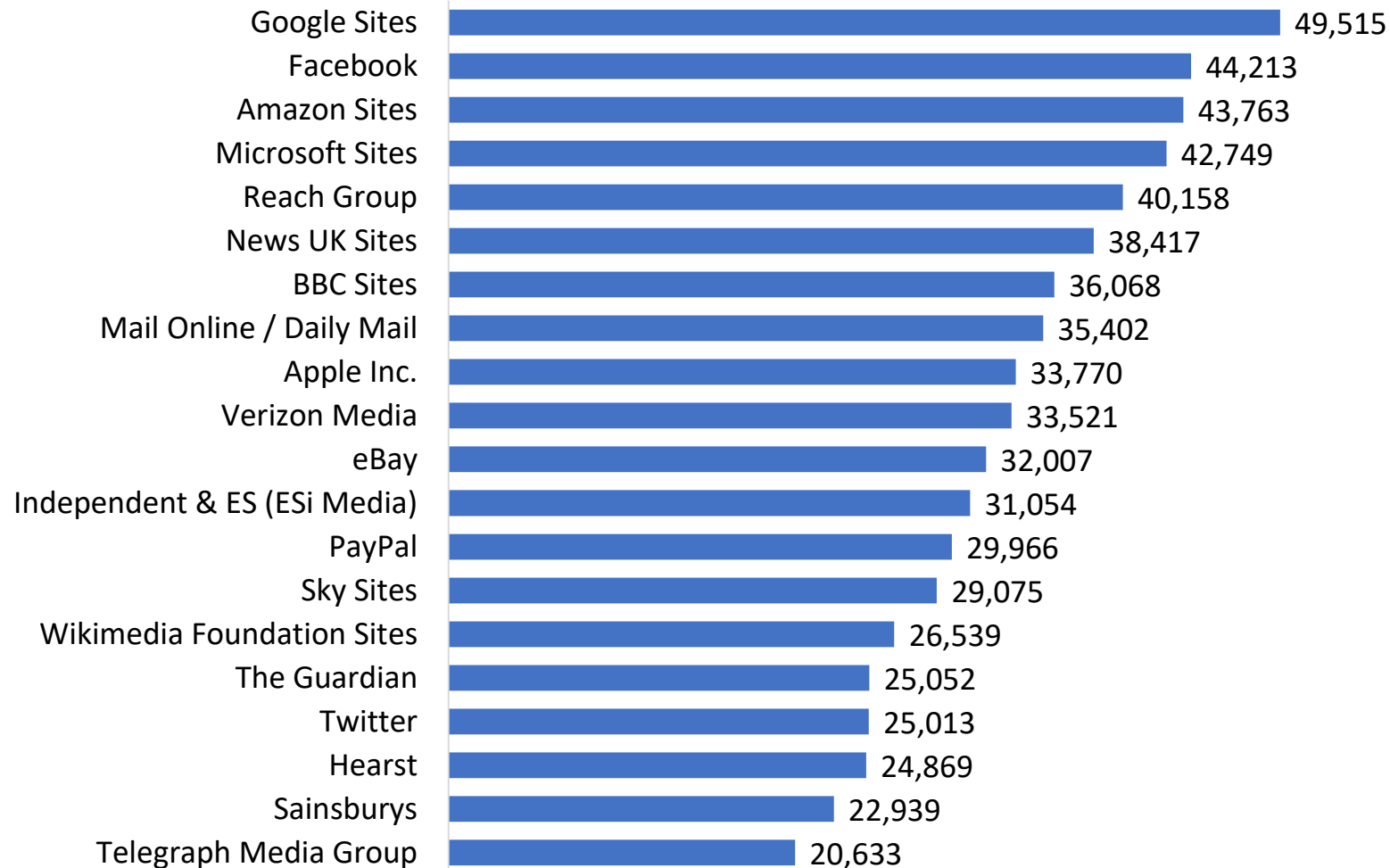
Top Properties: Total Digital Population

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

Google reaches 99% of the UK Online population



Total Unique Visitors/Viewers (000s) = 50,089



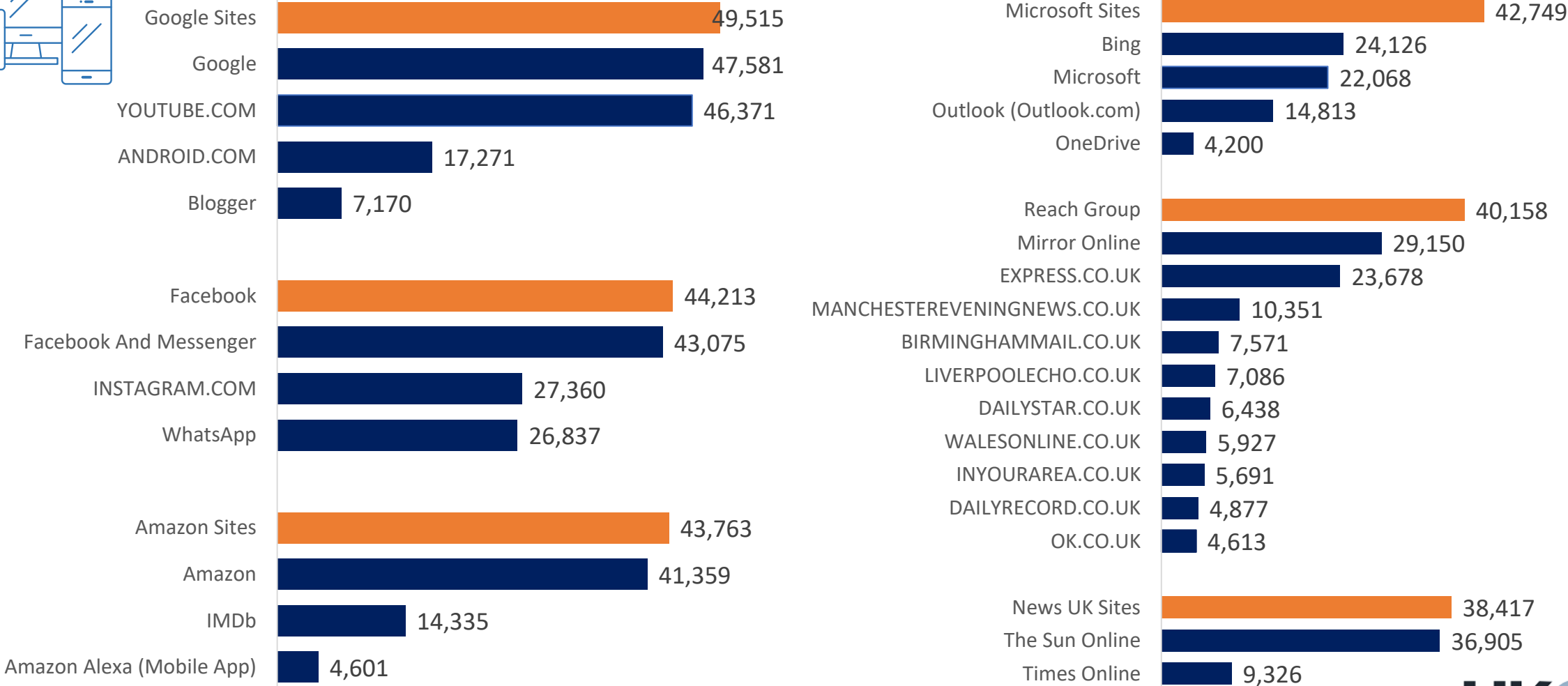
Google's properties now reach 98.9% of the UK population

Audience Breakdown of Top 6 Sites: Media Titles > 4 million visitors

YouTube reaches more than all Facebook properties combined



Total Unique Visitors (000)

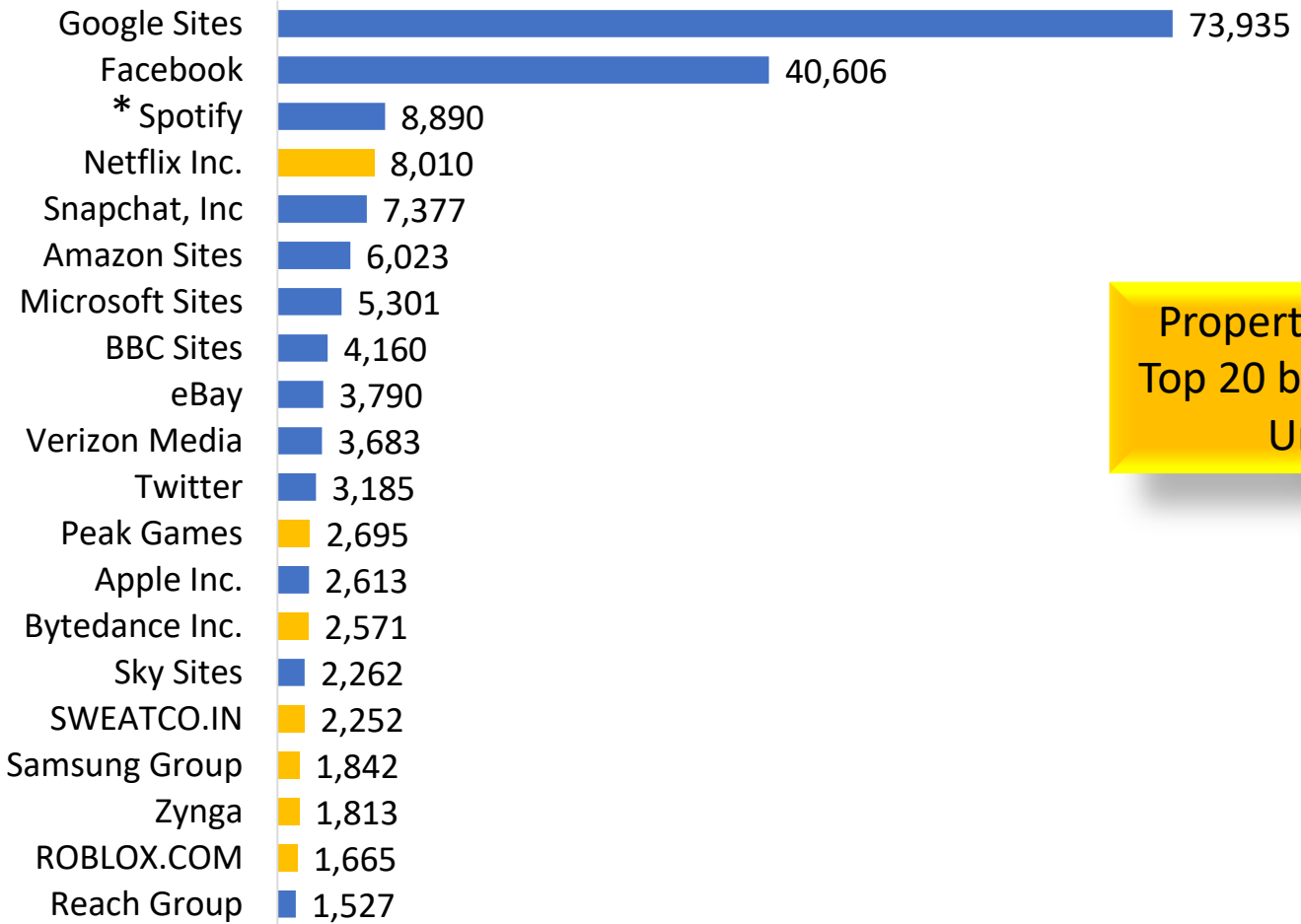


Top 20 Properties by 'Time Spent' – Total Digital Population

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



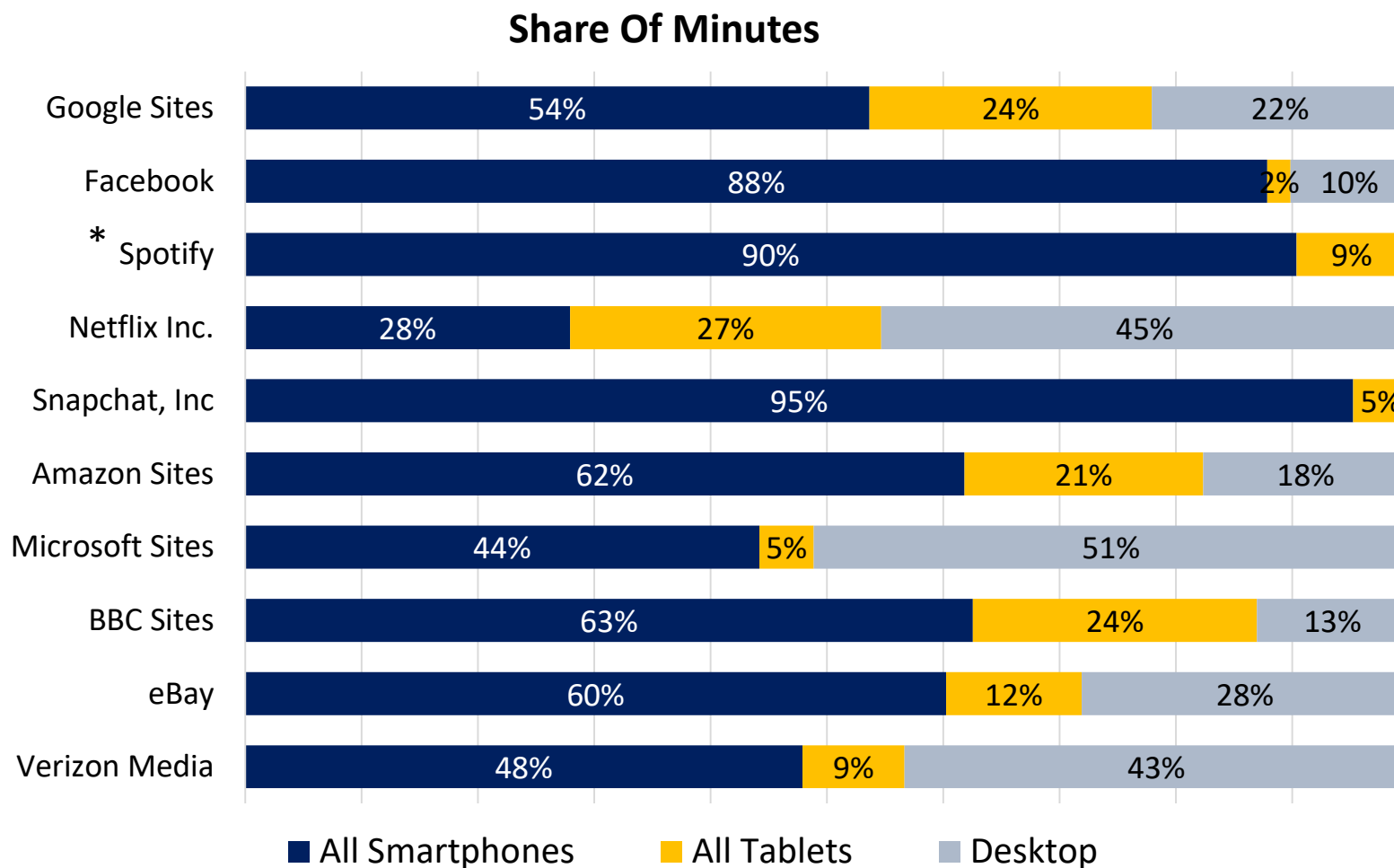
Total Mins (MM) – Total Market = 289,847



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

Platform split is very different for the top 10



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

BBC, Google (Inc YT) and Amazon have highest Tablet share out of top 10

Of the top 10, Microsoft Sites have the greatest desktop share

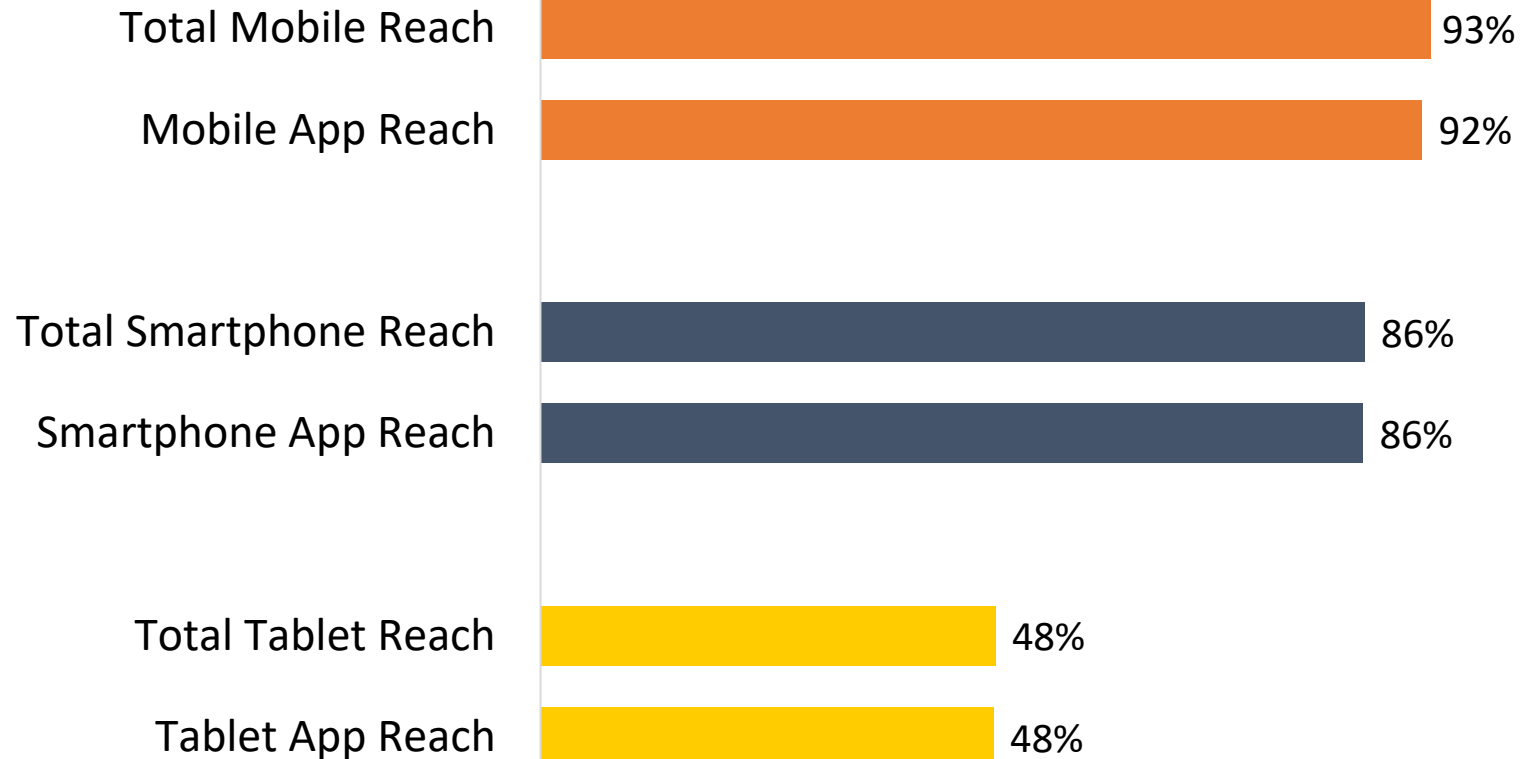


Mobile usage

Mobile Reach by Platform & Access

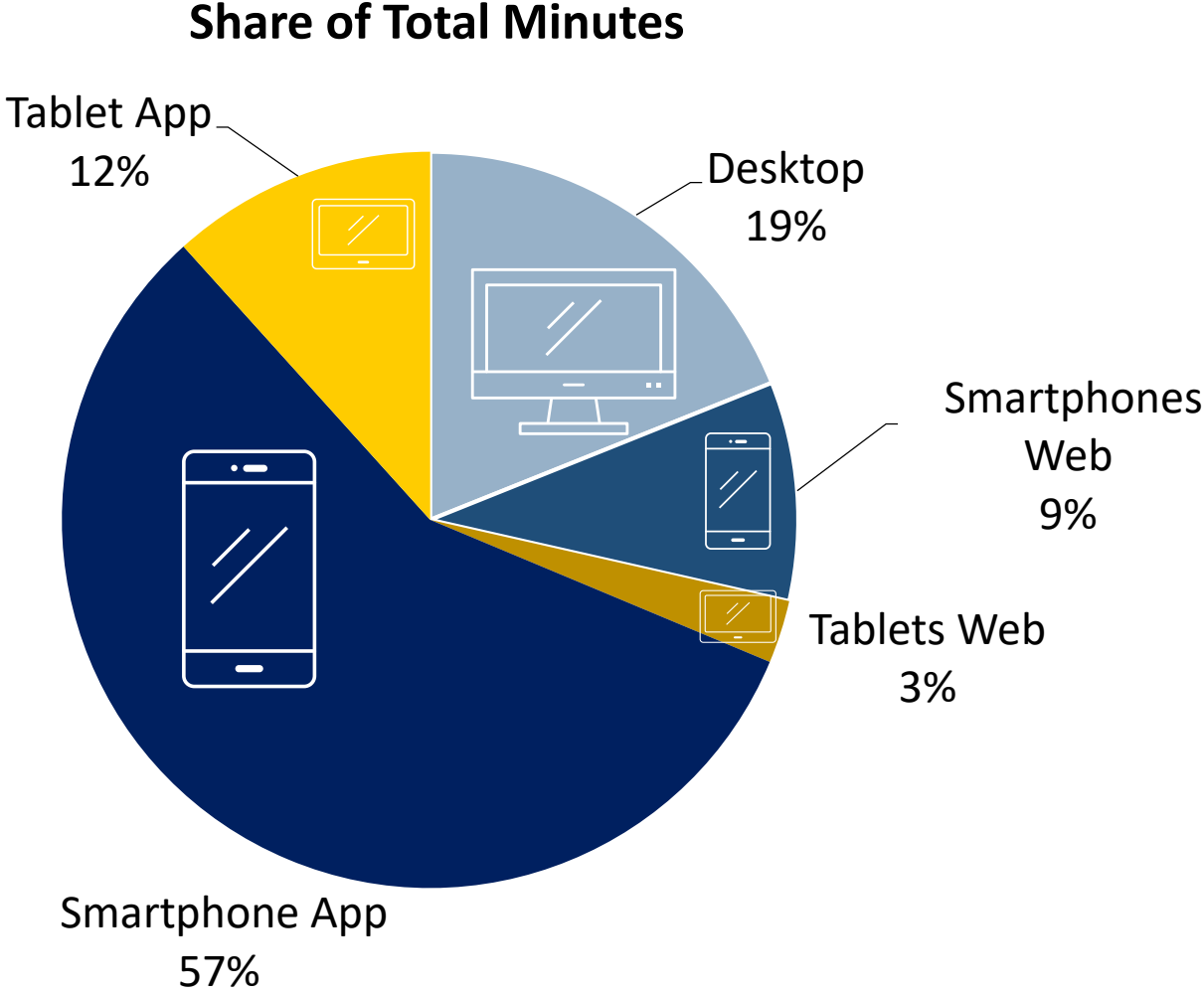
App use is now ubiquitous

Reach of Online UK Population - Dec 2019, 18+



Minutes by Platform & Mobile Access

Smartphone apps account for 57% of all Minutes



Source: Comscore MMX Multi-Platform, Age 18+, December 2019, 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



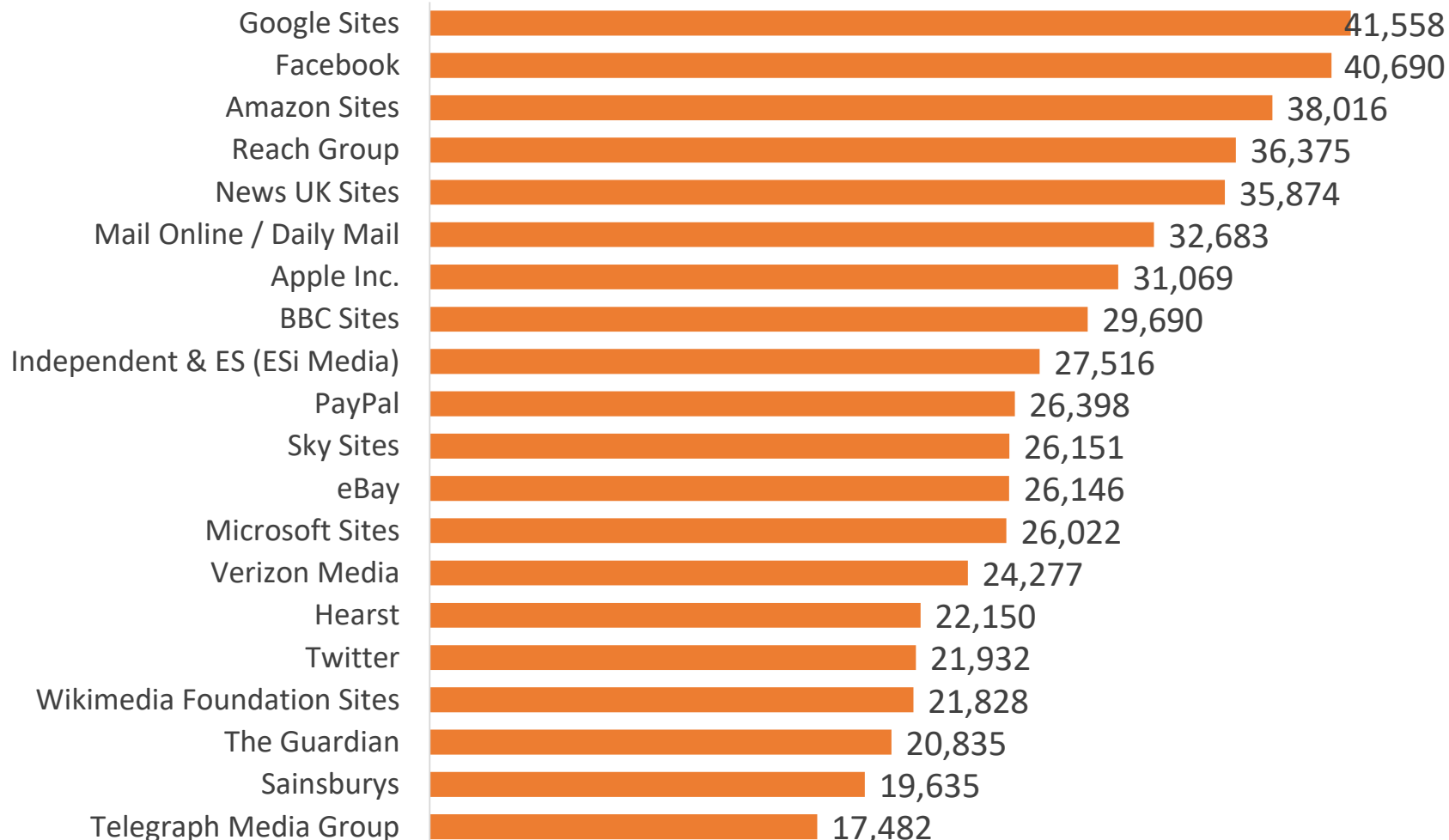
Top Properties: Mobile Population

Top 20 Mobile Properties ranked by Unique Visitors

41.8m adults accessed mobile content in Dec 2019 (via browser or app)



Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 41,815

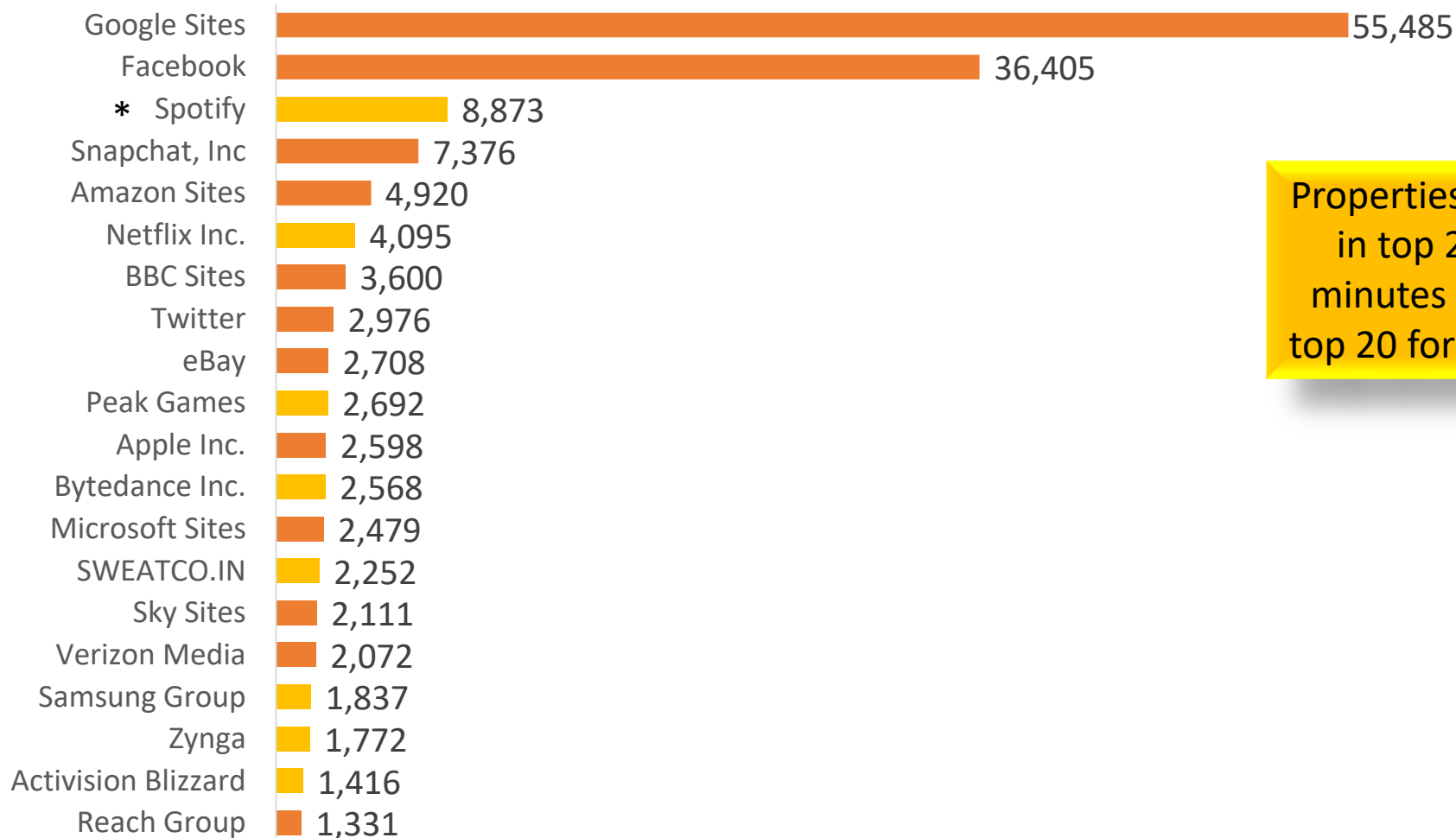


Top 20 Mobile Properties ranked by minutes

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



Total Minutes (MM) Total Mobile (18+) = 230,701



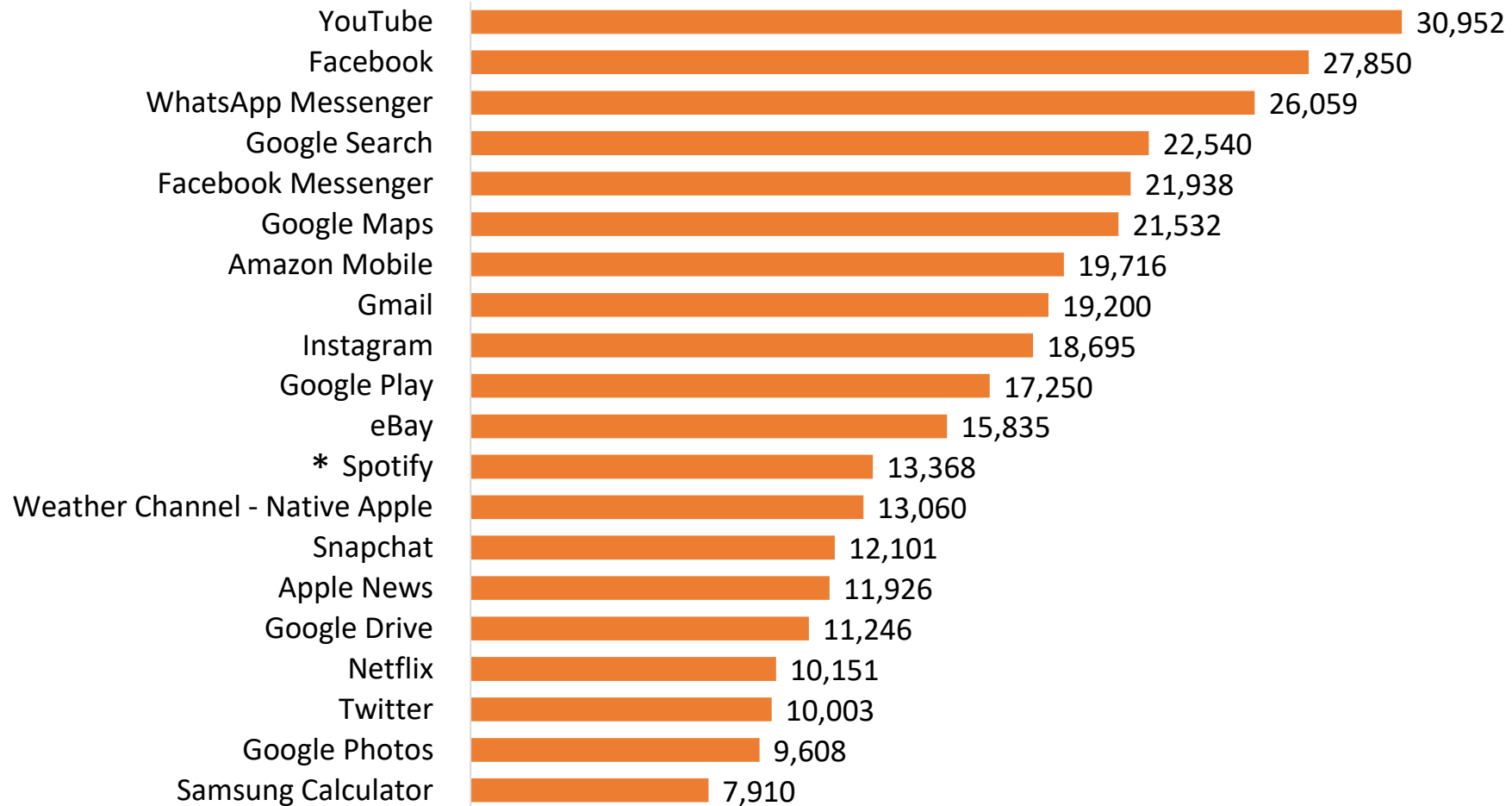
Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

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 = 41.1m



Source: Comscore Mobile Metrix, Age 18+, December 2019, UK. Please note that 'mobile' includes smartphone and tablet usage combined

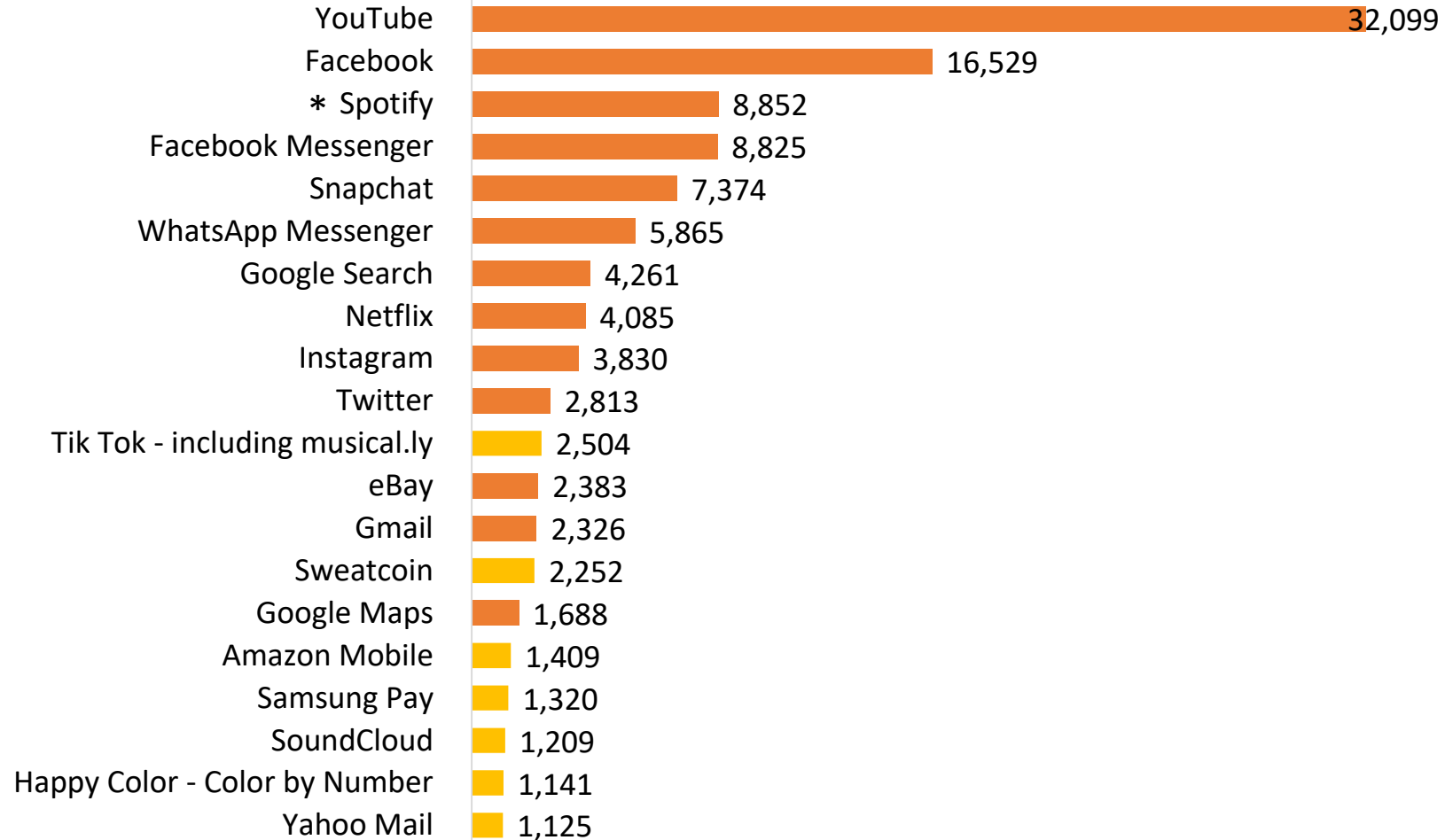
*Due to a tagging problem on Android platforms, [P] Spotify and [M] Spotify (Mobile App) were under-reported in December 2019 Mobile Metrix and Media Metrix Multi-Platform data.

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

TikTok is now just outside the top 10 for total minutes



Total Mins (MM) – Total Market = 195,477



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



Smartphone Top 10



Tablet Top 10



	(Million)
YouTube	31.0
Facebook	27.8
WhatsApp Messenger	26.1
Google Search	22.5
Facebook Messenger	21.9
Google Maps	21.5
Amazon Mobile	19.7
Gmail	19.2
Instagram	18.7
Google Play	17.3

	(Million)
YouTube	26.2
WhatsApp Messenger	26.1
Facebook	24.8
Facebook Messenger	20.6
Google Search	20.5
Google Maps	20.2
Gmail	17.8
Amazon Mobile	17.5
Google Play	17.3
Instagram	16.6

	(Million)
YouTube	7.3
Facebook	4.3
Netflix	3.1
Instagram	2.8
Amazon Mobile	2.8
Google Search	2.7
Apple News	2.3
BBC IPlayer	2.1
*Spotify	1.9
eBay	1.8

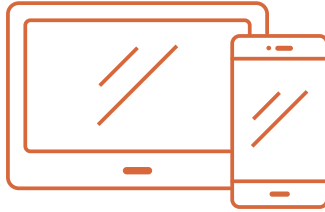
Source: Comscore Mobile Metrix, Age 18+. December 2019, UK
Please note that 'mobile' includes smartphone and tablet usage combined

*Due to a tagging problem on Android platforms, [P] Spotify and [M] Spotify (Mobile App) were under-reported in December 2019 Mobile Metrix and Media Metrix Multi-Platform data.

Top 10 Mobile Apps by Minutes by Mobile Platform

Spotify, Netflix & eBay enter the top 10 for Minutes

Total Mobile Top 10



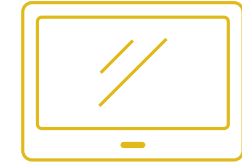
	(Billion)
YouTube	32.1
Facebook	16.5
*Spotify	8.9
Facebook Messenger	8.8
Snapchat	7.4
WhatsApp Messenger	5.9
Google Search	4.3
Netflix	4.1
Instagram	3.8
Twitter	2.8

Smartphone Top 10



	(Billion)
• YouTube	20.6
• Facebook	16.0
• Facebook Messenger	8.8
• *Spotify	8.0
• Snapchat	7.0
• WhatsApp Messenger	5.9
• Instagram	3.8
• Google Search	2.9
• Twitter	2.6
• Sweatcoin	2.3

Tablet Top 10



	(Billion)
• YouTube	6.9
• Netflix	1.1
• Google Search	1.1
• *Spotify	1.1
• YouTube Kids	0.4
• Happy Color	0.3
• Facebook	0.3
• Amazon Prime Video	0.3
• eBay	0.3
• Snapchat	0.3

Source: Comscore Mobile Metrix, Age 18+. December 2019, UK
Please note that 'mobile' includes smartphone and tablet usage combined

*Due to a tagging problem on Android platforms, [P] Spotify and [M] Spotify (Mobile App) were under-reported in December 2019 Mobile Metrix and Media Metrix Multi-Platform data.



Categories

Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

19%

Computer Software	92%
Web Hosting	90%
Autos Manufacturer	77%
Family & Youth Education	73%
Auctions	71%
Investments	61%
Entertainment - Movies	61%
Education	59%
Gaming Information	56%
Government	55%
Business to Business	50%
Taxes	50%
Automotive	49%
Airlines	48%
Politics	45%



Smartphone total

67%

• Instant Messengers	99%
• Gay/Lesbian	97%
• Diet & Exercise/Fitness Tracker	95%
• Health	95%
• Car Transportation	95%
• Job Search	94%
• Maps/GPS/Traffic	94%
• Payments	94%
• Coupons/Incentives	93%
• Social Media	89%
• Consumer Electronics	88%
• Dating	86%
• Weather	85%
• Religion/Spirituality	85%
• Entertainment - Music	84%



Tablet total

14%

Kids	34%
Books	30%
e-cards	29%
Family & Youth	28%
Entertainment	26%
Games	22%
General News	19%
Retail - Music	19%
Search/Navigation	18%
News/Information	16%
Department Stores/Malls	15%
Real Estate	15%
Forums/Message Boards	14%
Jewellery/Luxury Goods	14%
Technology	14%

Source: Comscore MMX Multi-Platform, Adults 18+, December 2019, UK

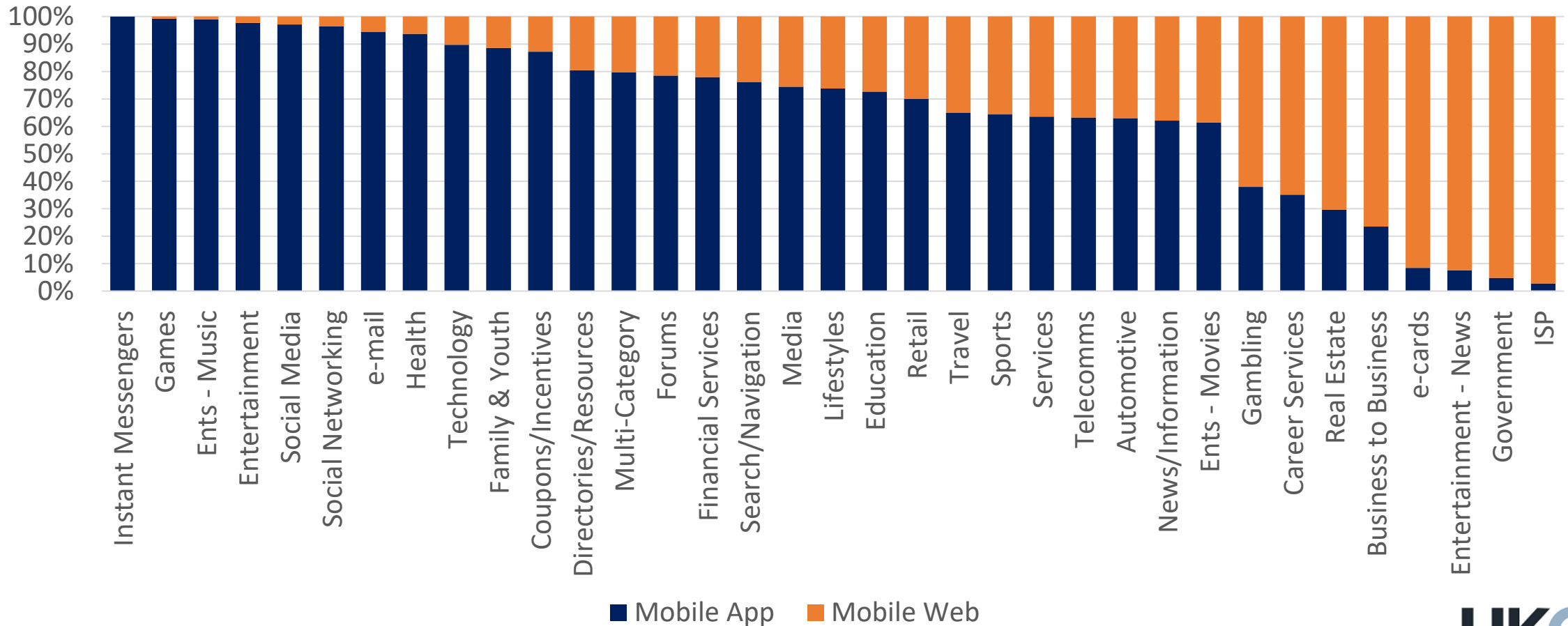
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

Share of Mobile Minutes by Access Type by Category

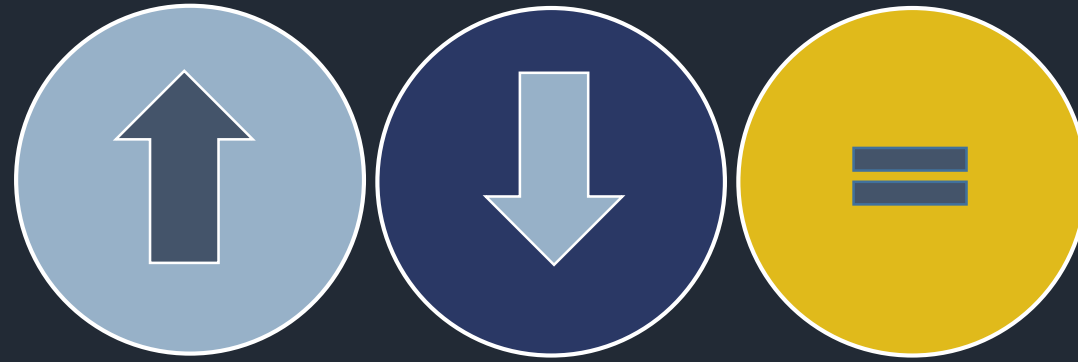
Mobile App share of minutes varies by content & service



Mobile App v Mobile Web Share of Mobile Minutes



Source: Comscore Mobile Matrix, Age 18+. December 2019, UK
Please note that 'mobile' includes smartphone and tablet usage combined



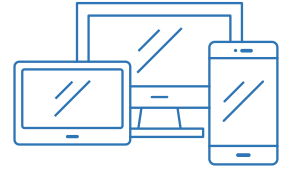
Key Changes: Dec 19 v Oct 19

Given the enhanced methodology resulting in a trend break between Sept and Oct, the focus this quarter is on categories and brands which have witnessed strong growth between Oct and Dec 2019

Top performing Categories based on Unique Visitor Growth Oct-Dec 2019

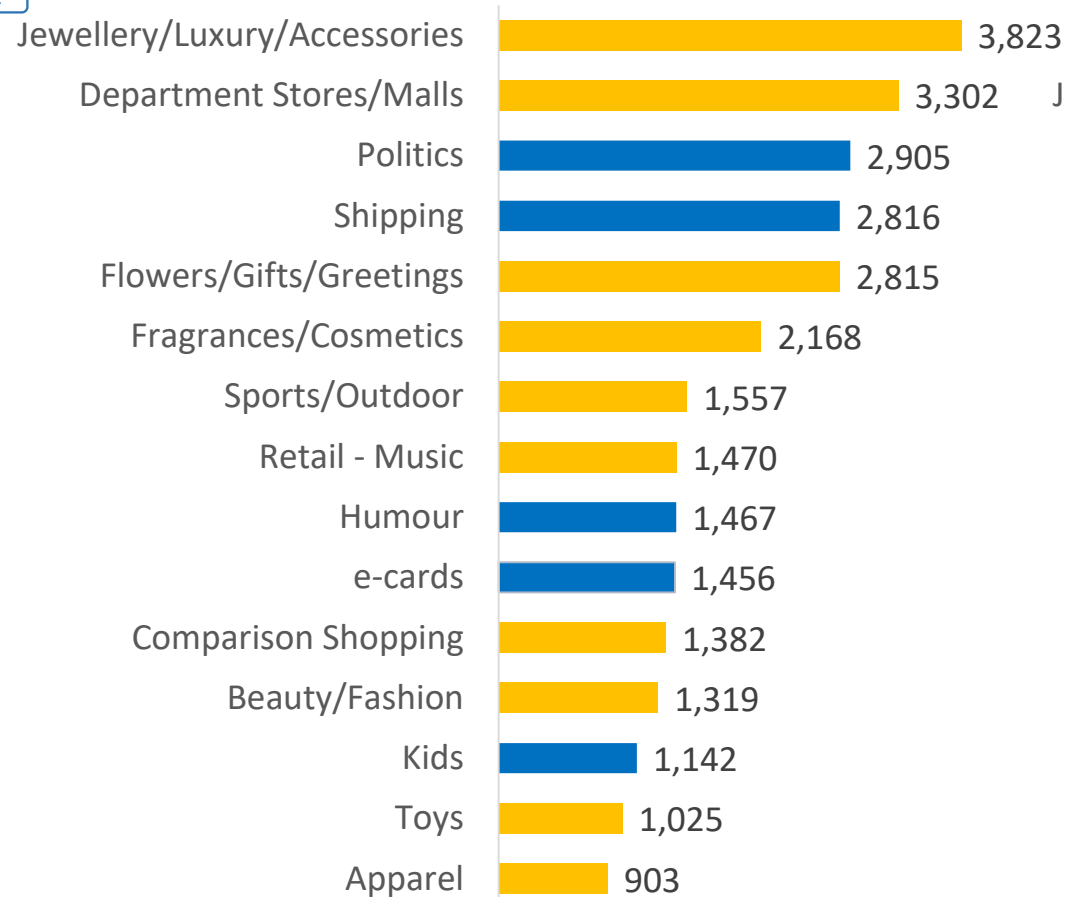


Retail dominates Top Growth Categories for Dec 2019

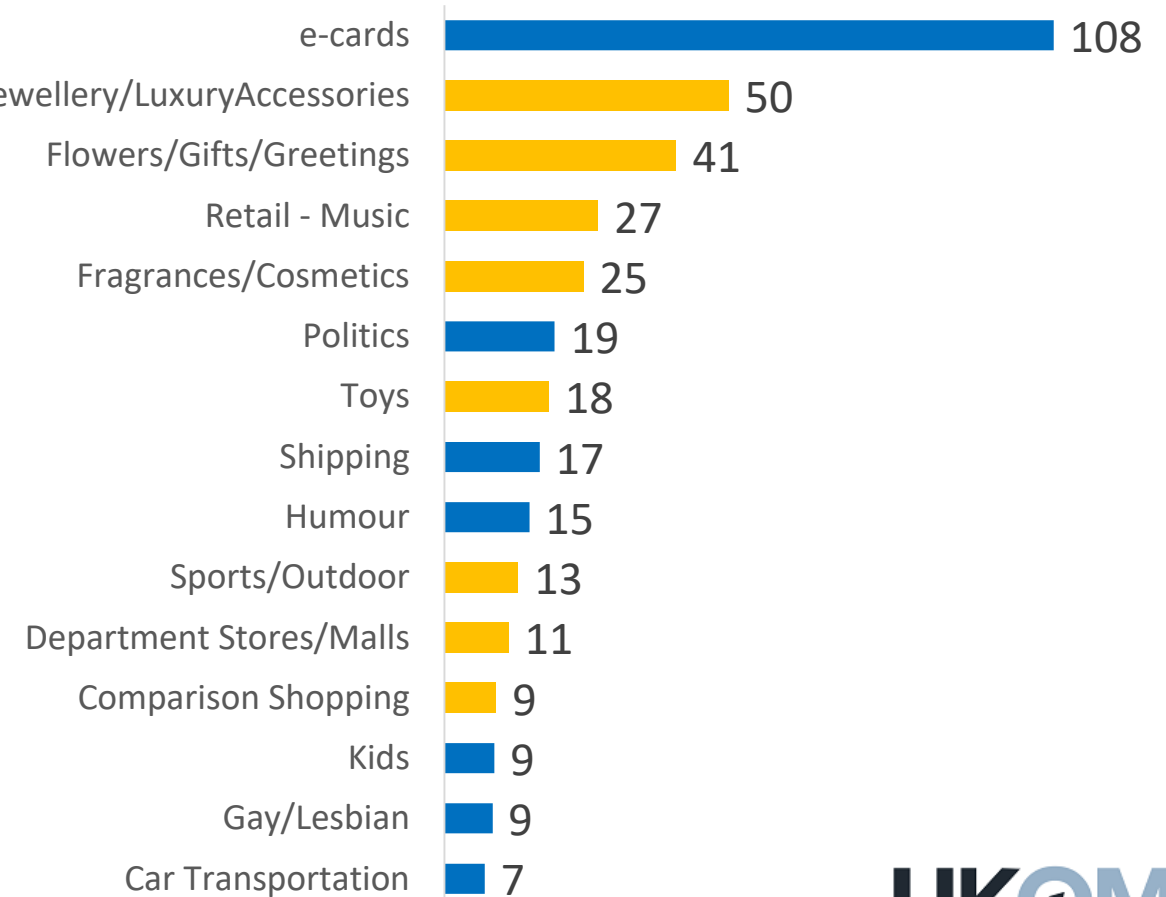


Category Growth – Dec 19 v Oct 19

Unique Visitor Increase: Dec 19 v Oct 19 (000s)



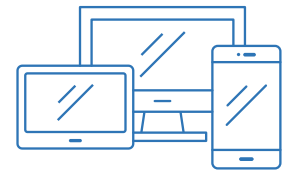
Unique Visitor % Increase: Dec 19 v Oct 19



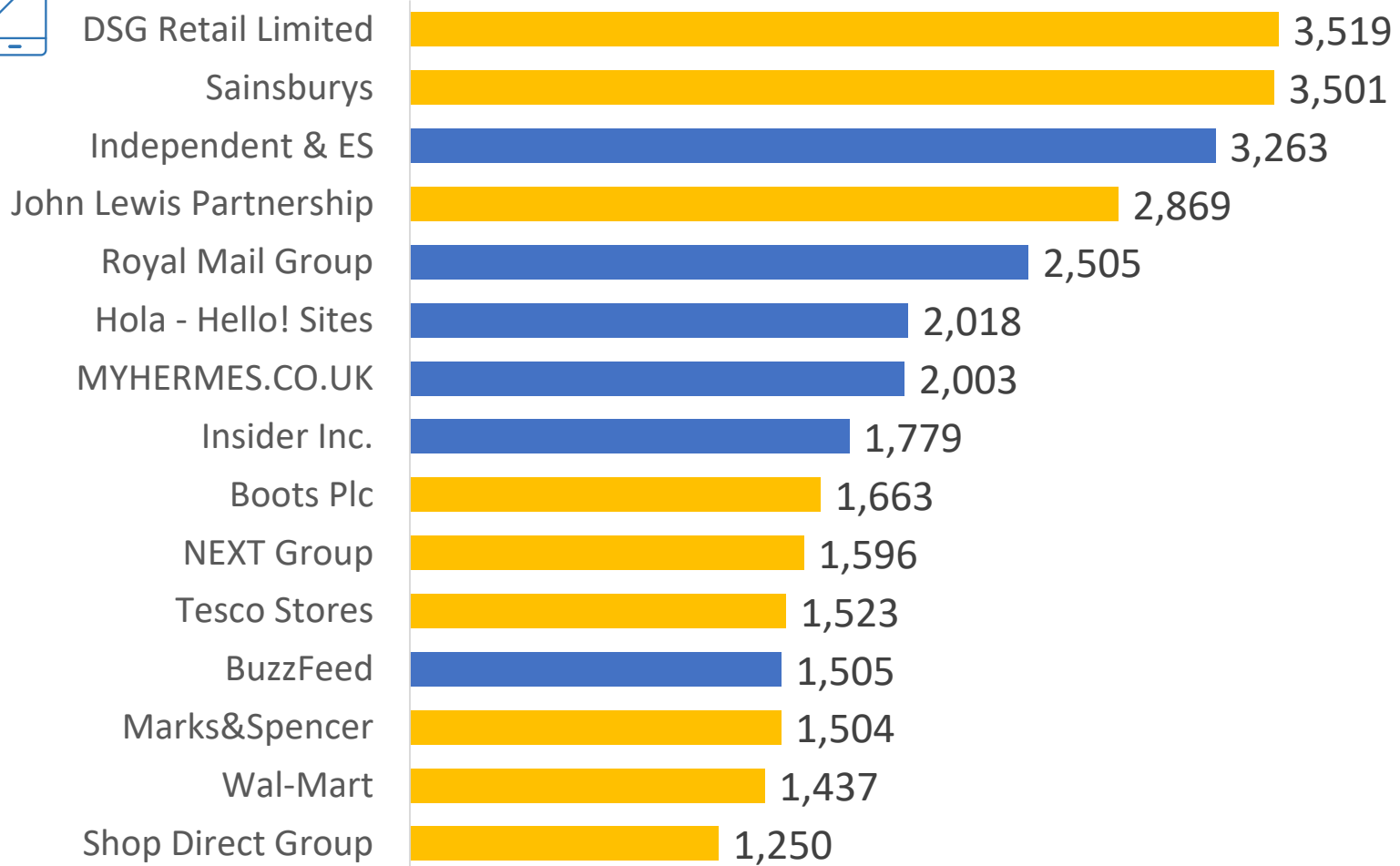
Properties in the Top 100 which Added most Unique Visitors: Oct-Dec 2019



Retailers experienced the biggest gains



Additional Audience (000s) – Dec 19 v Oct 19



Other retailers outside the top 100 which performed well included:

- Pentland Group + 2.4m
- Notonthehighstreet +1.6m
- Debenhams +1.4m
- The Perfume Shop +1.3m

Properties which went from ZERO to >1m included:

- Wheredoivote +1.2m
- Noradsanta +1m
- Voteforpolices + 1m

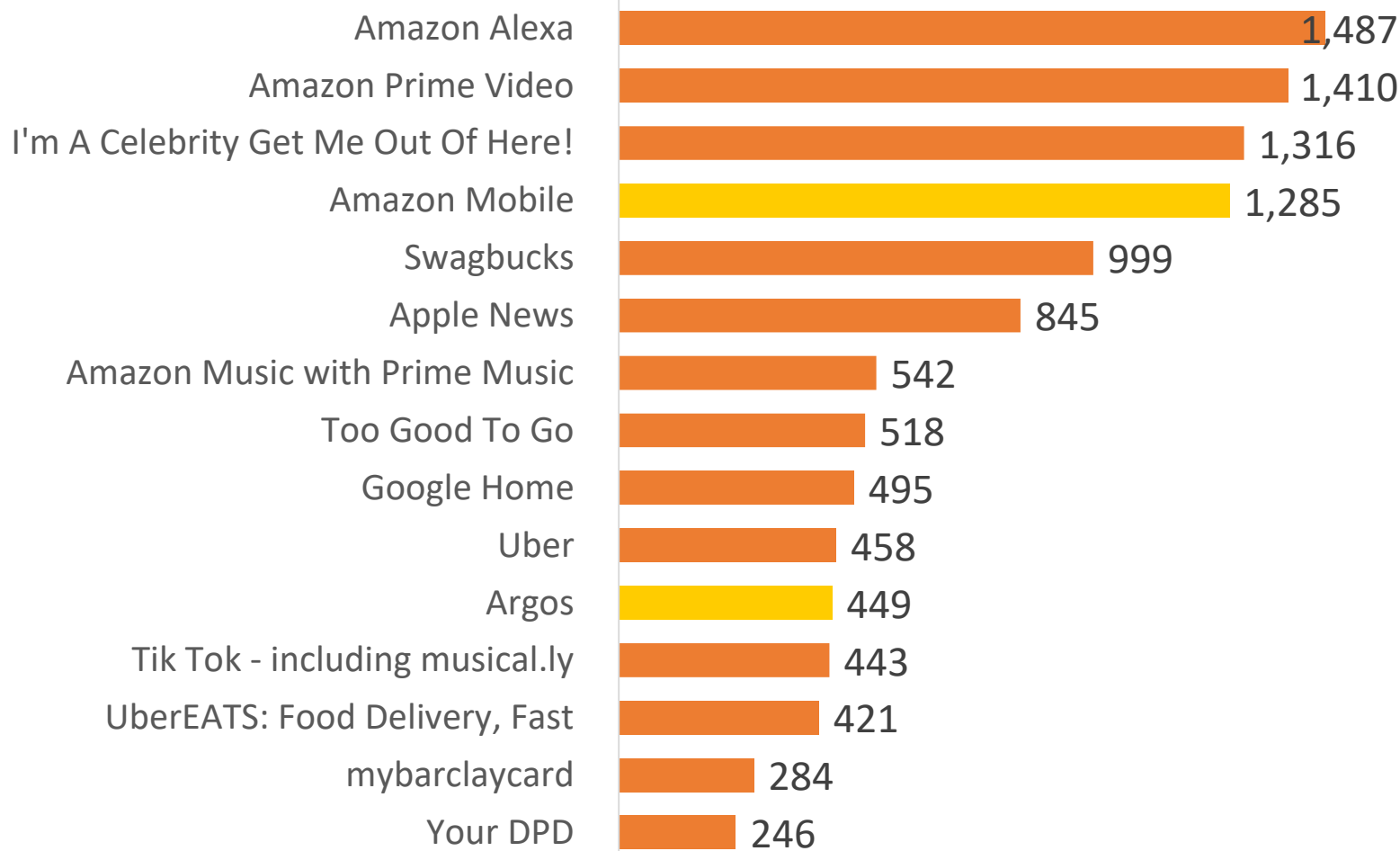
Mobile Apps in top 200 which added most Unique Visitors: Oct -Dec 19



Very few retailers in Top Growth Apps



Additional Audience (000s) – Dec 19 v Oct 19



Questions?

Find out more at: <http://www.ukom.uk.net/>
Email us at: 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*
- **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*

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

Stay connected

 [Comscoreinc](https://www.facebook.com/Comscoreinc)

 [@ComscoreEMEA](https://twitter.com/ComscoreEMEA)

 [Comscore-inc](https://www.linkedin.com/company/comscore-inc)

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/