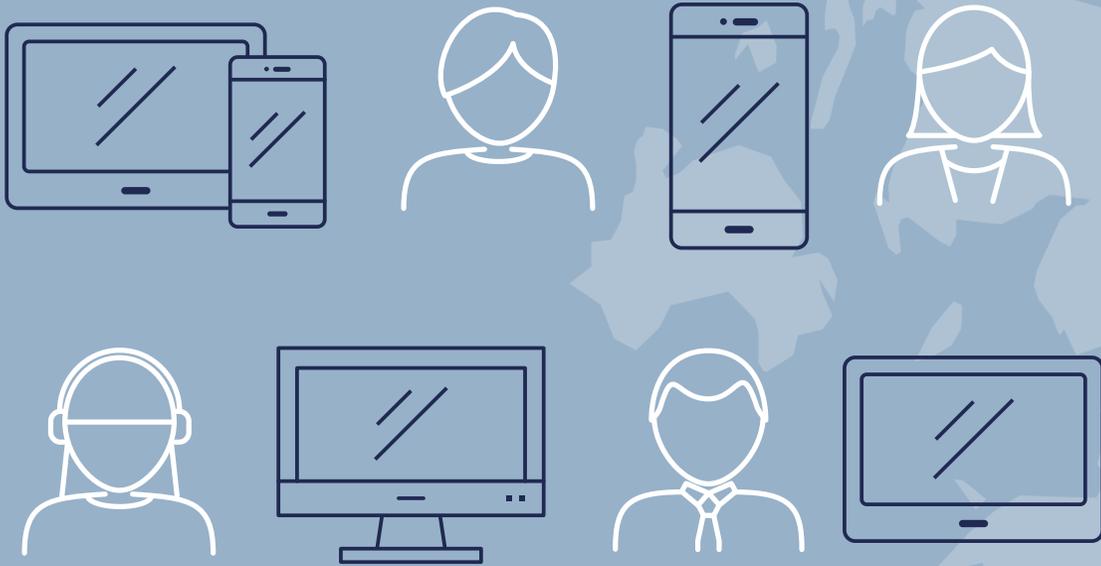


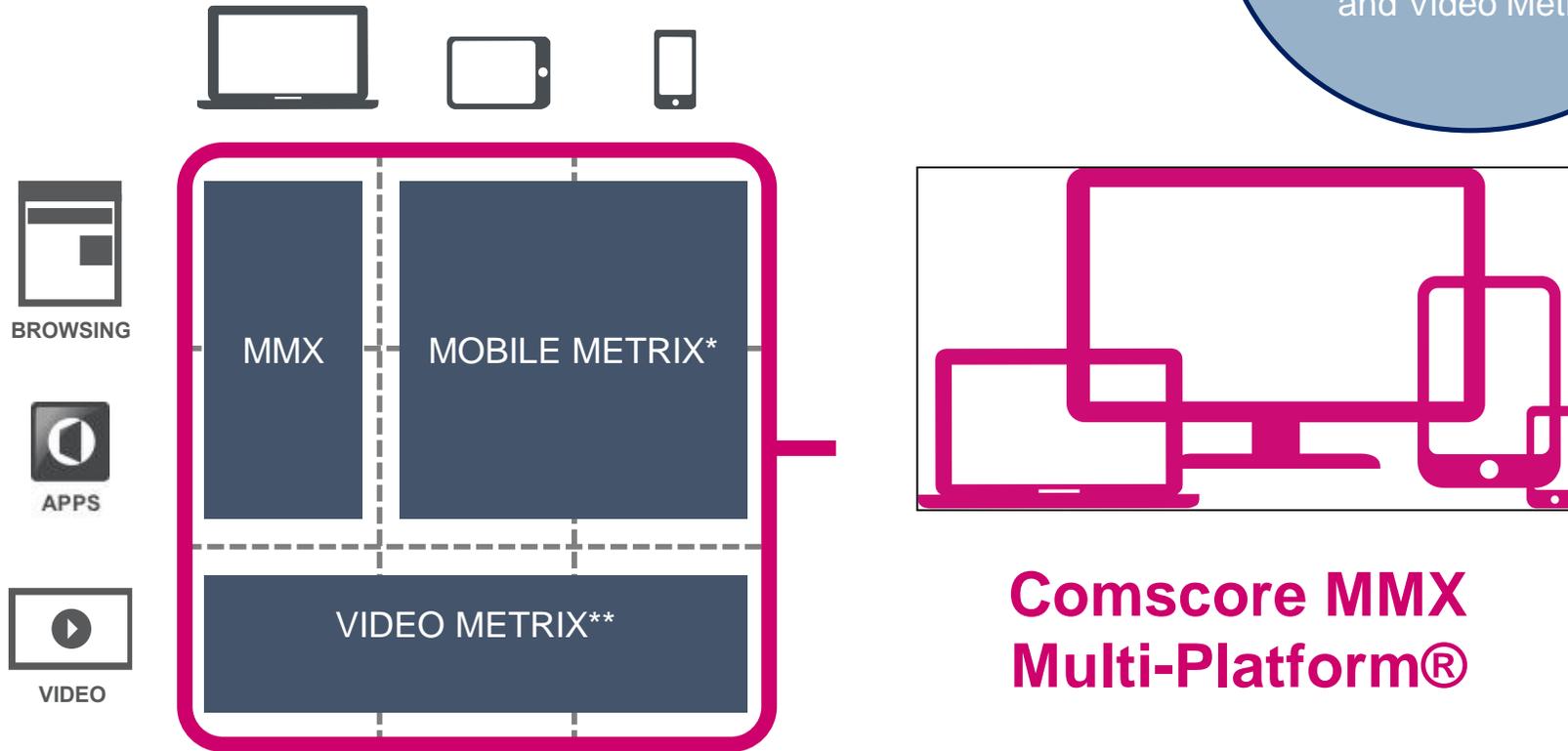
# UK Digital Market Overview – June 2019



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



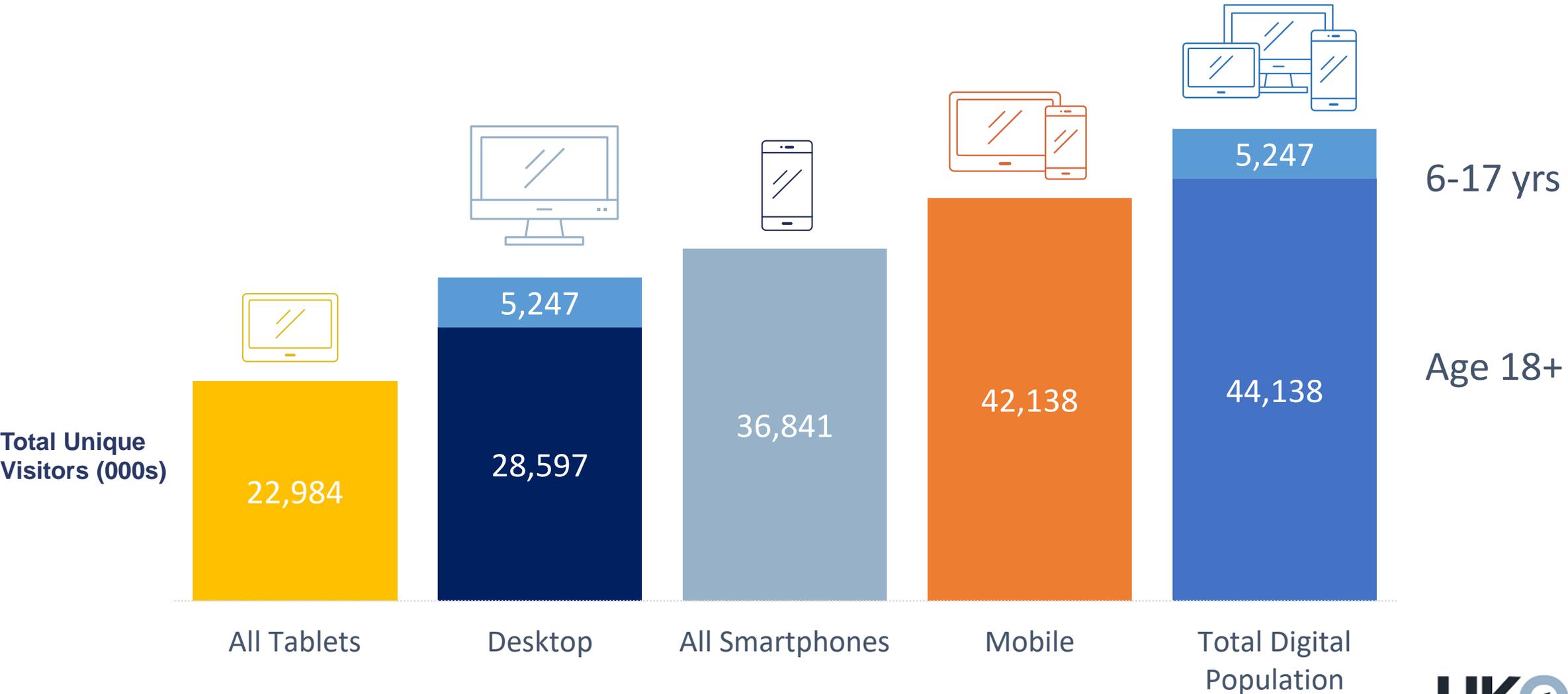
\*Please note that we use the term mobile to refer to smartphone and tablet usage combined

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



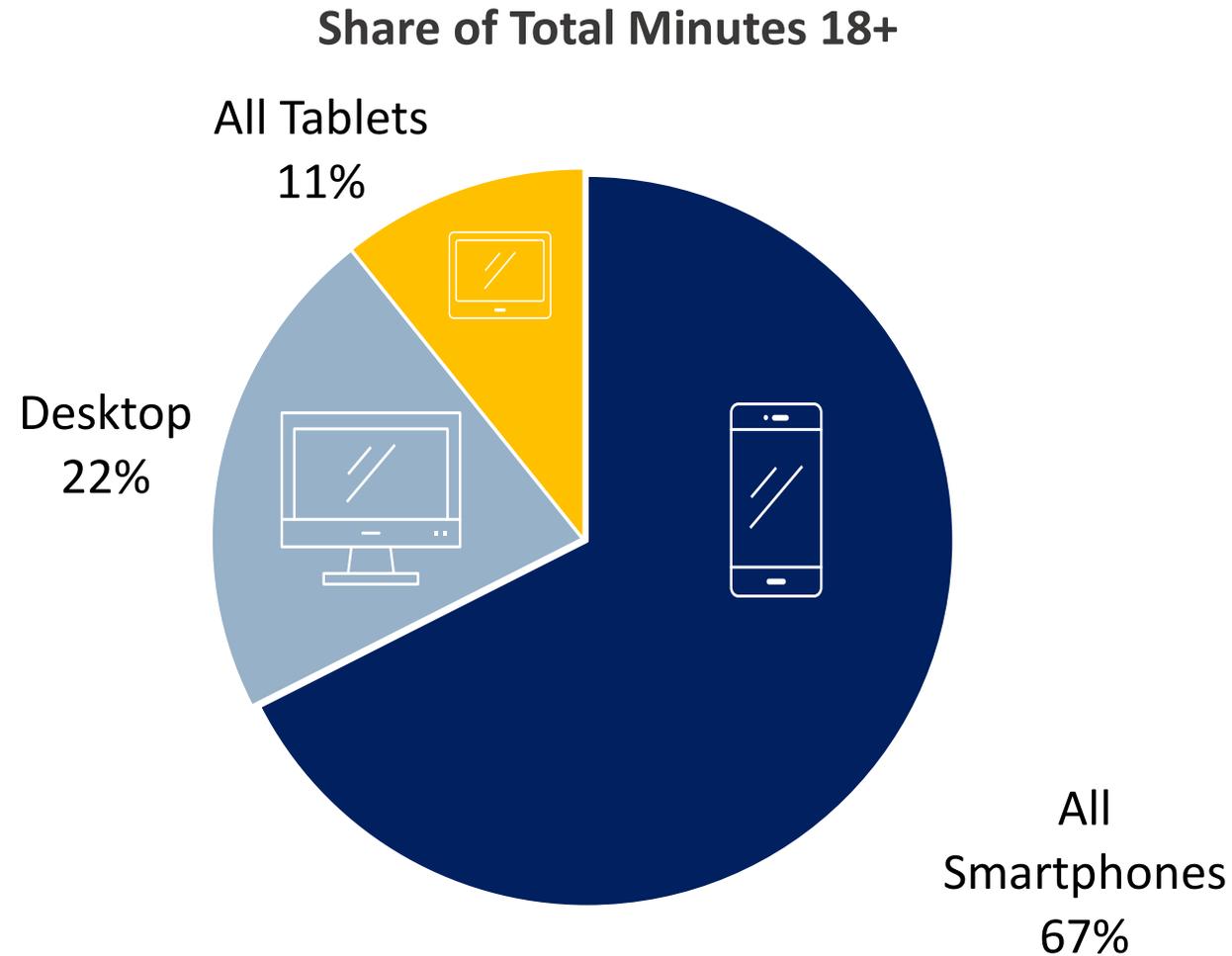
# Usage by Platform

# Breakdown of Digital Unique Visitors by Platform



# Share of Minutes by Platform

Mobile Devices now account for **78%** of all adult online minutes



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

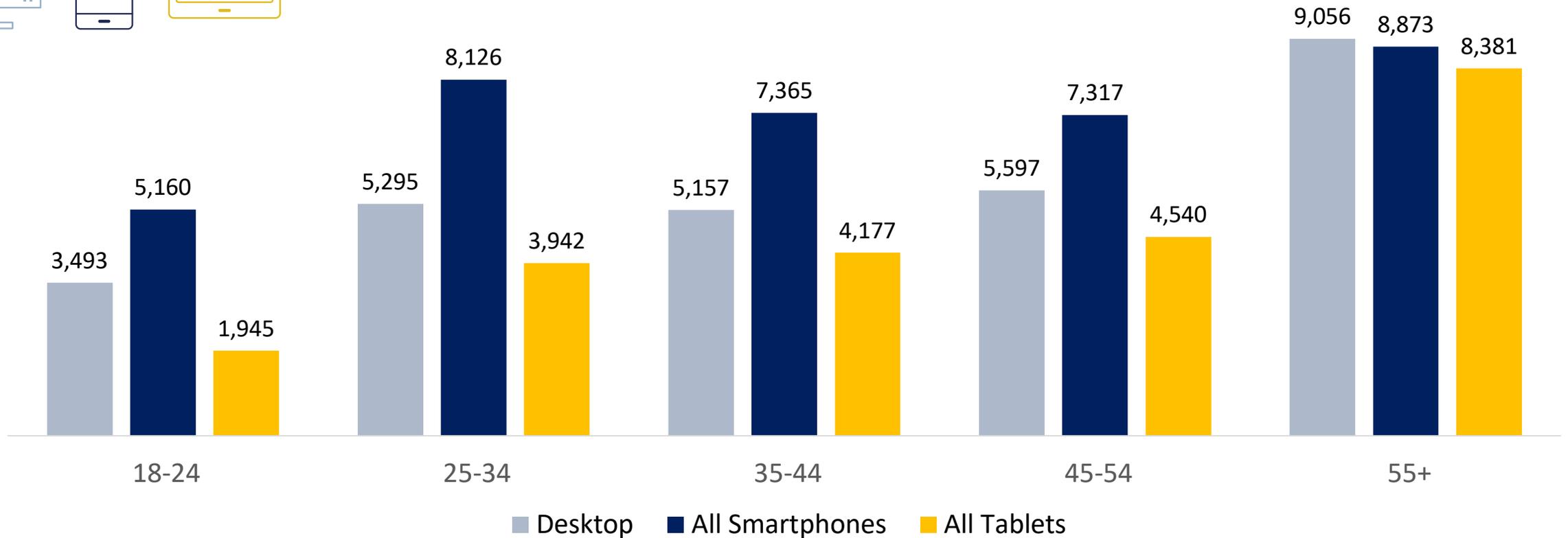
\*Desktop refers to 'Desktop, laptop and notebook. Total mobile refers to smartphone and tablet usage combined

# Platform Unique Visitors by Age

## The Desktop has higher reach amongst Older Audiences

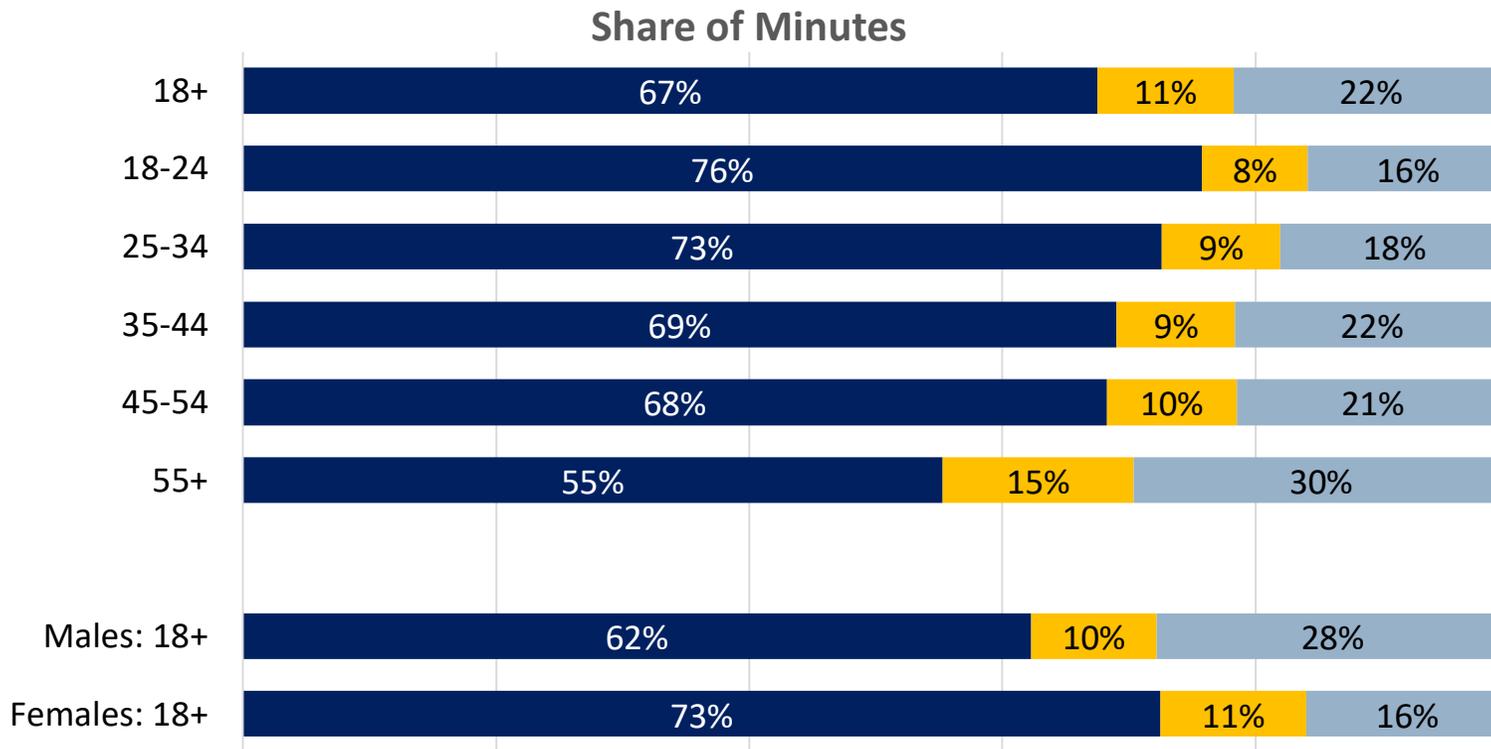


Audience by Platform by Age - Unique Visitors (000s)



# Platform Share of Minutes by Age & Gender

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



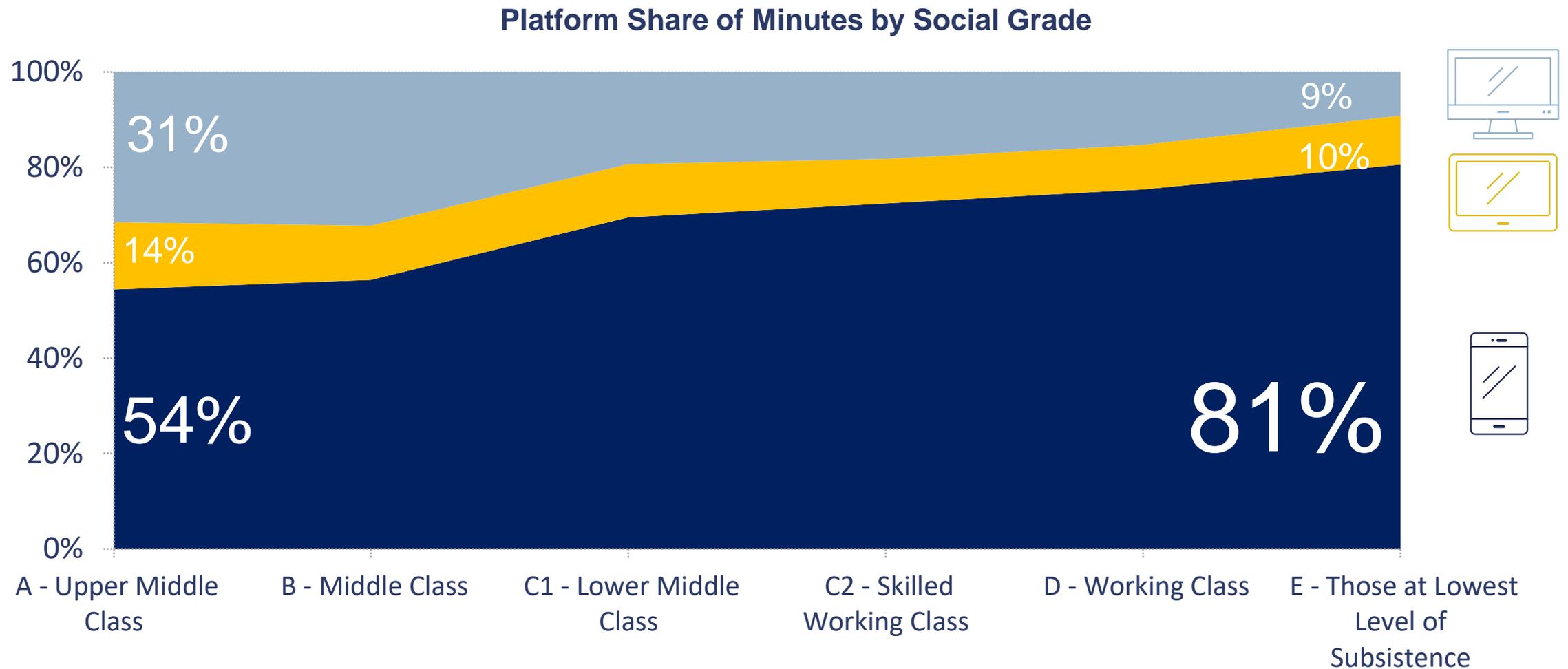
Smartphone share decreases with increasing age but 55+ have the greatest tablet share

Females 18+ spend 84% of their time online on mobile devices compared to only 72% for males.



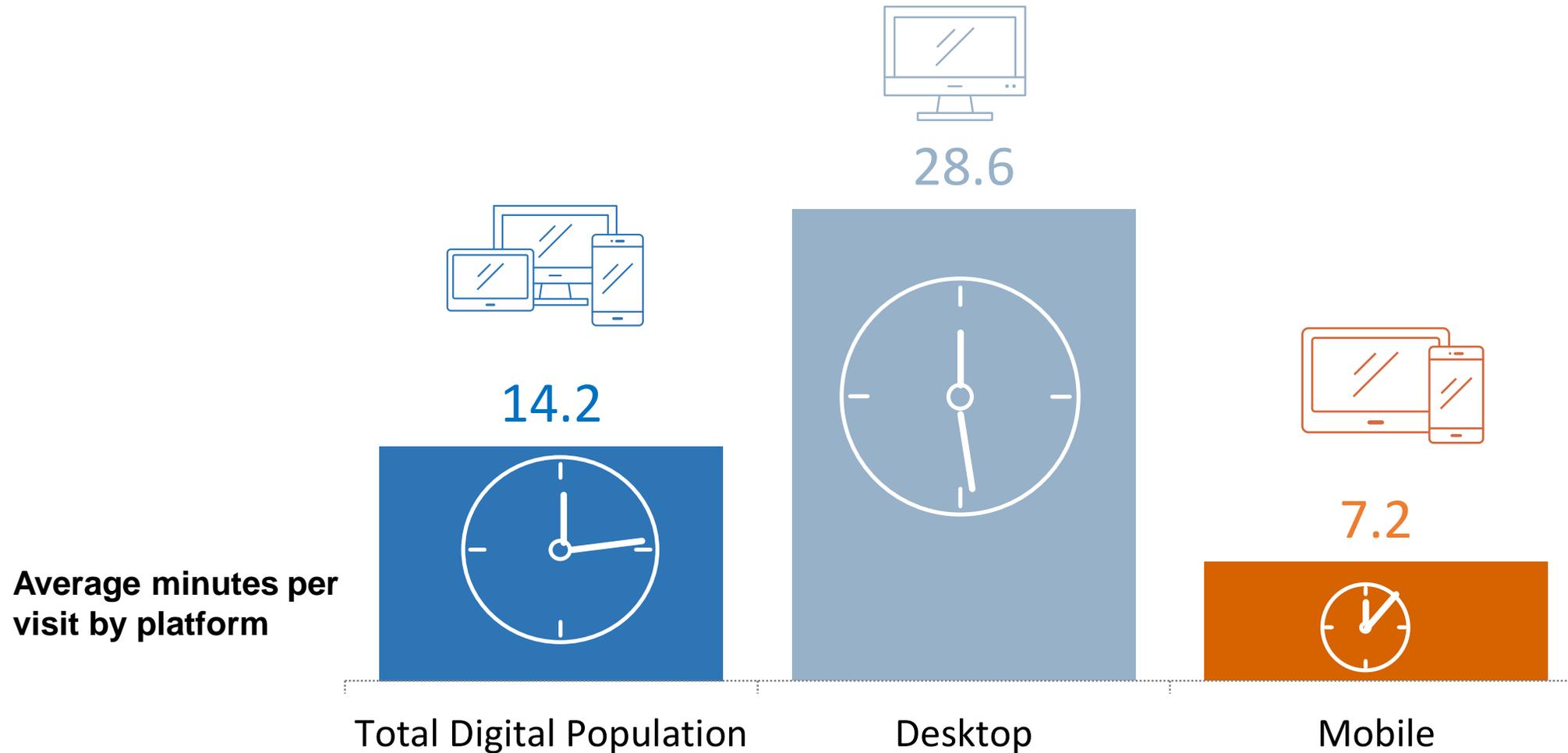
# Platform Share of Time Online by Social Grade

## Smartphone share increases as social grade decreases



# Average Minutes per Visit by Platform

Mobile visits are **shorter**



Average minutes per visit by platform

Total Digital Population

Desktop

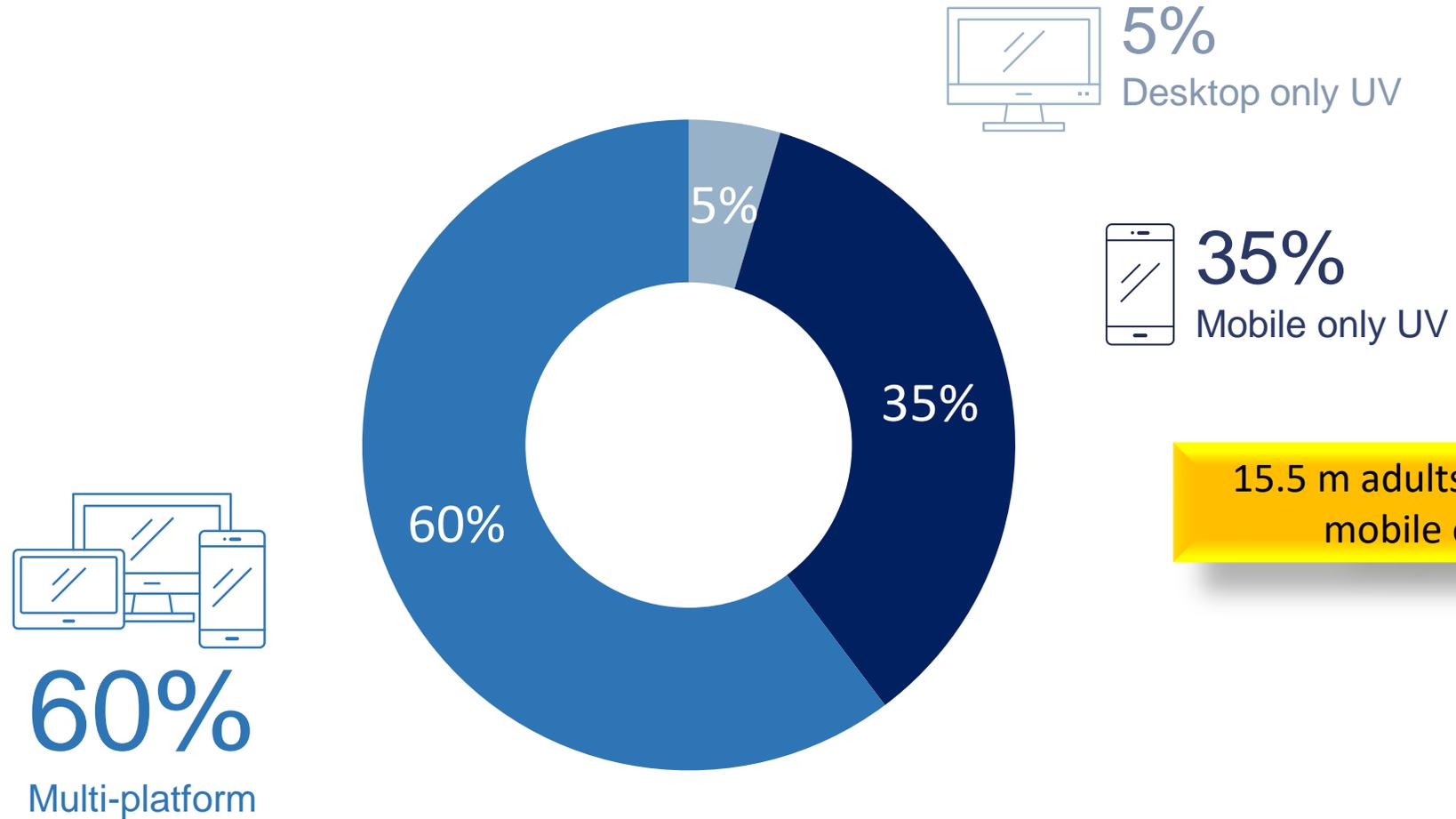
Mobile



# Multi-Platform Usage

# Multi-Platform Usage

## Over a third of UK Adults are now Mobile Only



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



**comscore**

MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps. Total mobile refers to smartphone and tablet usage combined

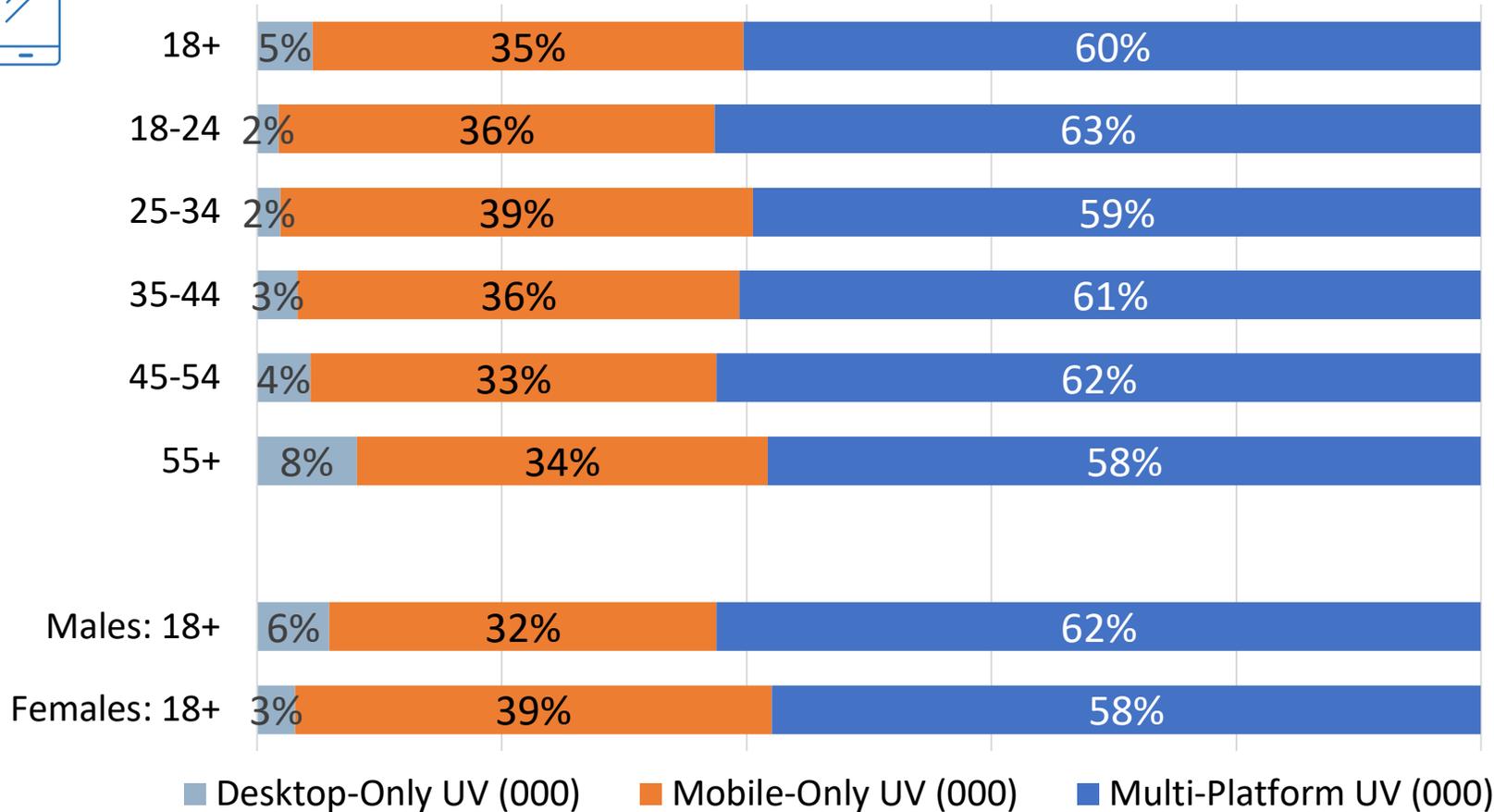
**JKOM**  
Setting the industry standard for  
online audience measurement

# Multi-Platform usage by age and gender

## 55+ are more likely to only use a desktop PC



Unique Viewers by Platform by Age & Gender



55+ are more likely to be 'desktop only'

Females are more likely to be 'Mobile Only'

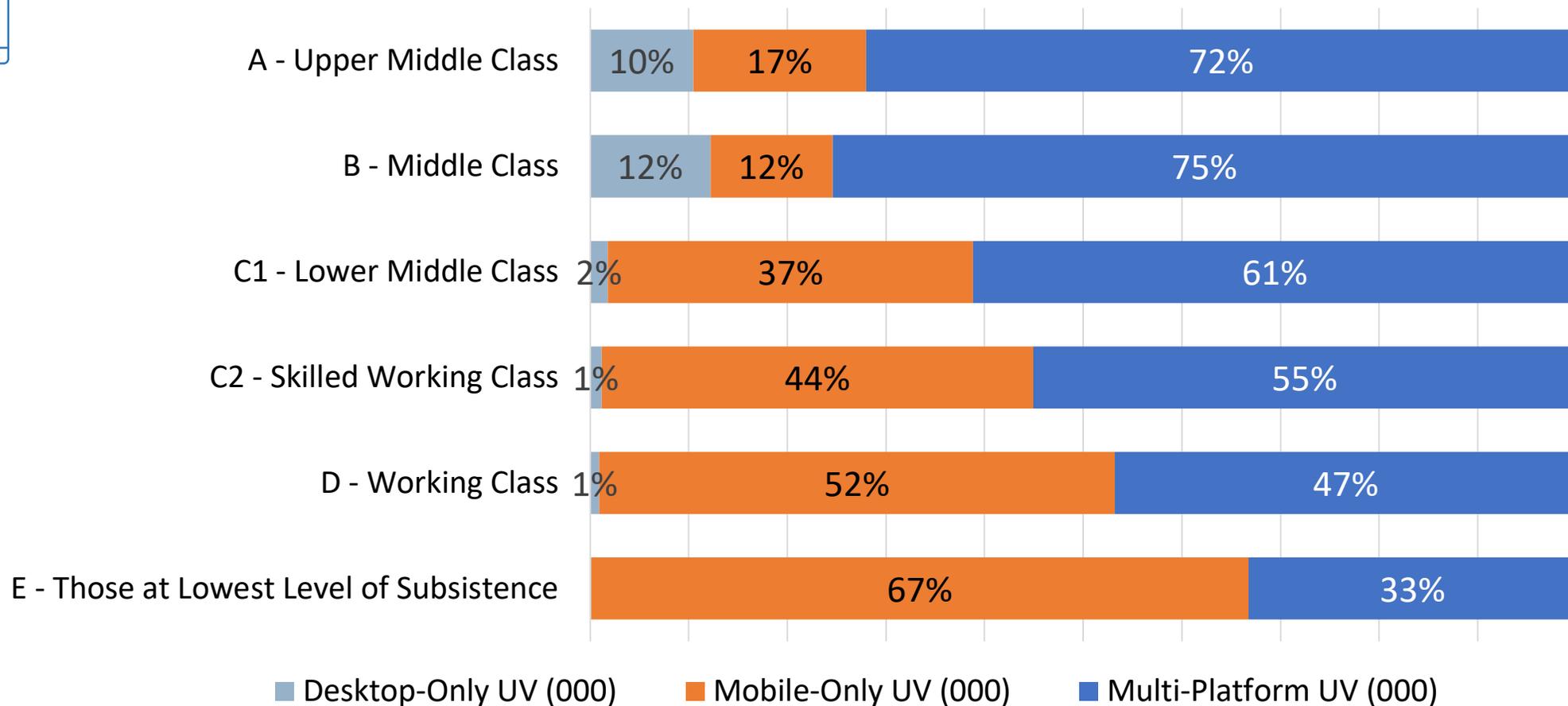
Source: Comscore MMX Multi-Platform, Jun 2019, UK Adults 18+

# Multi-Platform usage by social grade

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



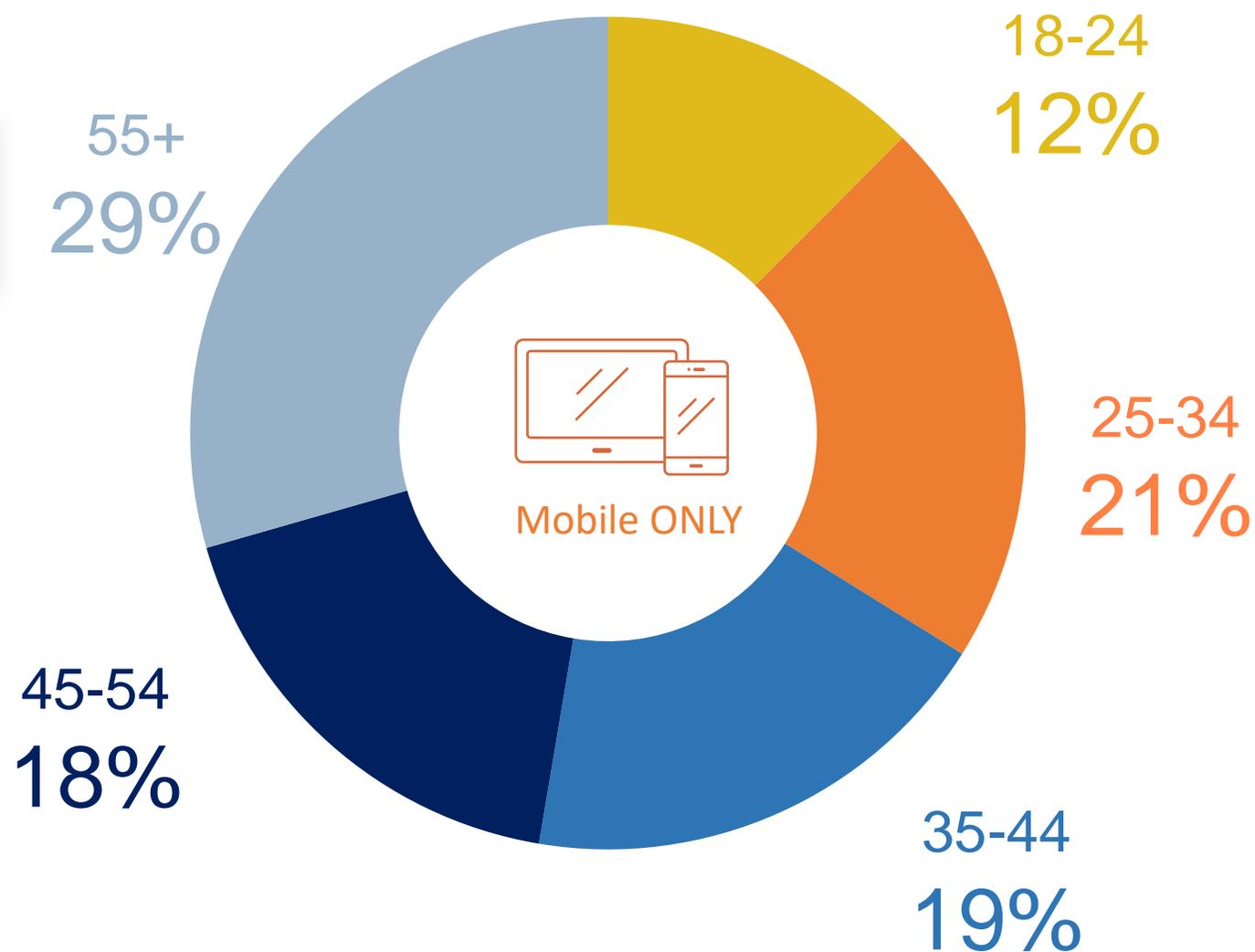
### Unique Viewers by Platform by Age & Gender



# 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



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

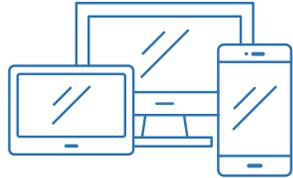
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & apps



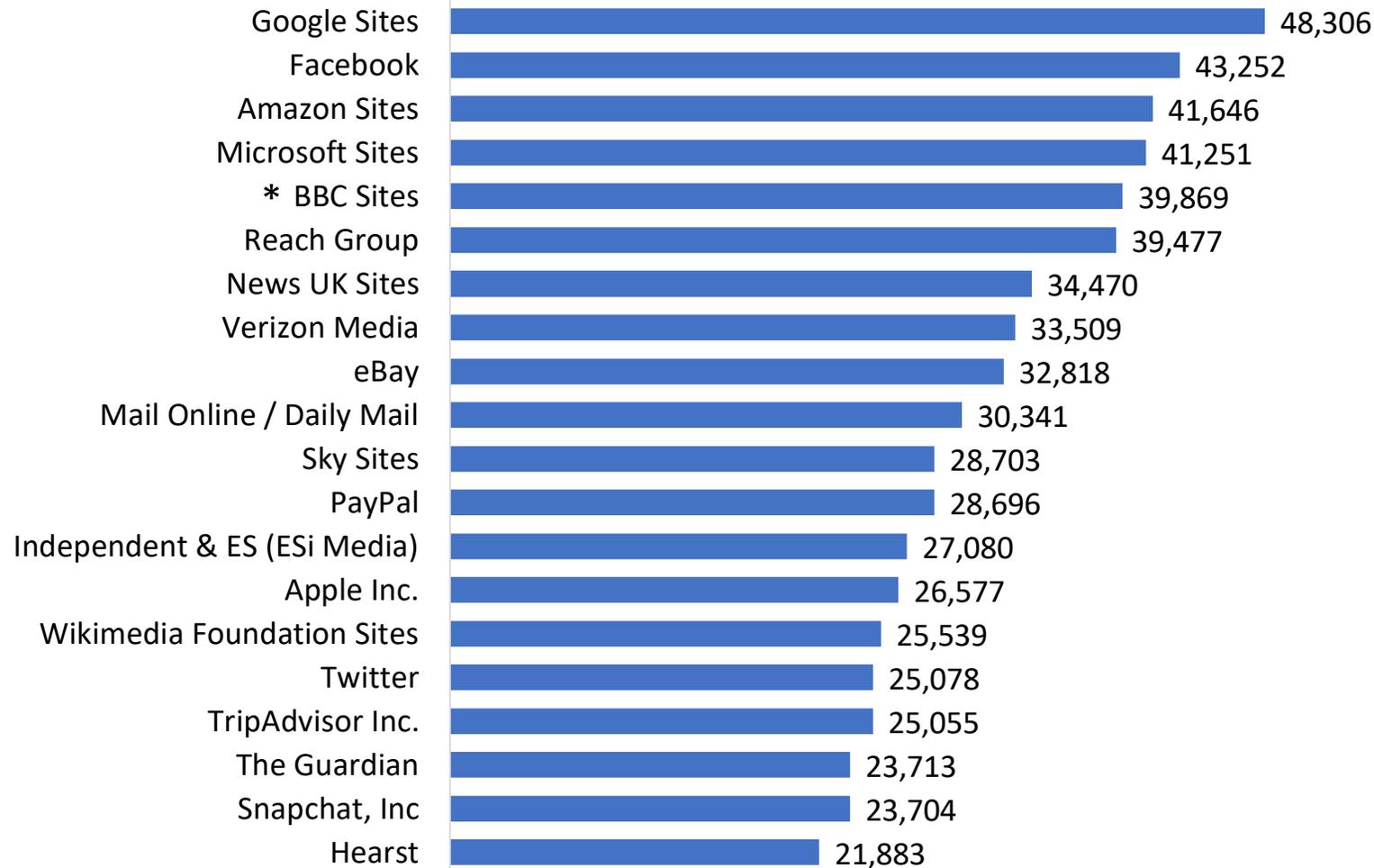
# Top Properties: Total Digital Population

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

## Google reaches 98% of the UK Online population



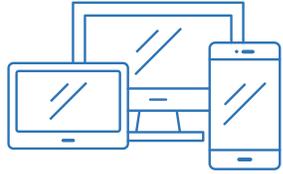
Total Unique Visitors/Viewers (000s) = 49,385



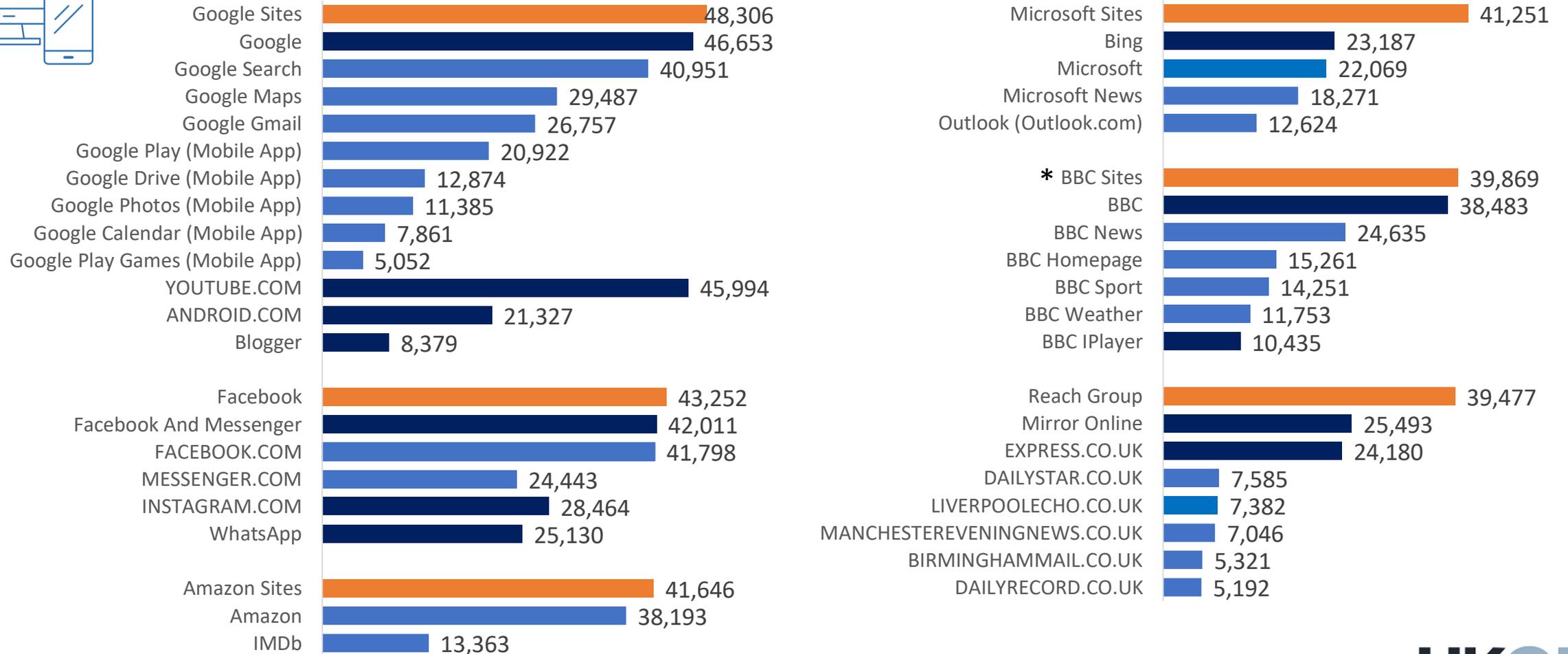
The top 5 properties all have online reach over 80%

# Audience Breakdown of Top 6 Sites

## YouTube alone reaches more than all Facebook properties combined



Total Unique Visitors (000)

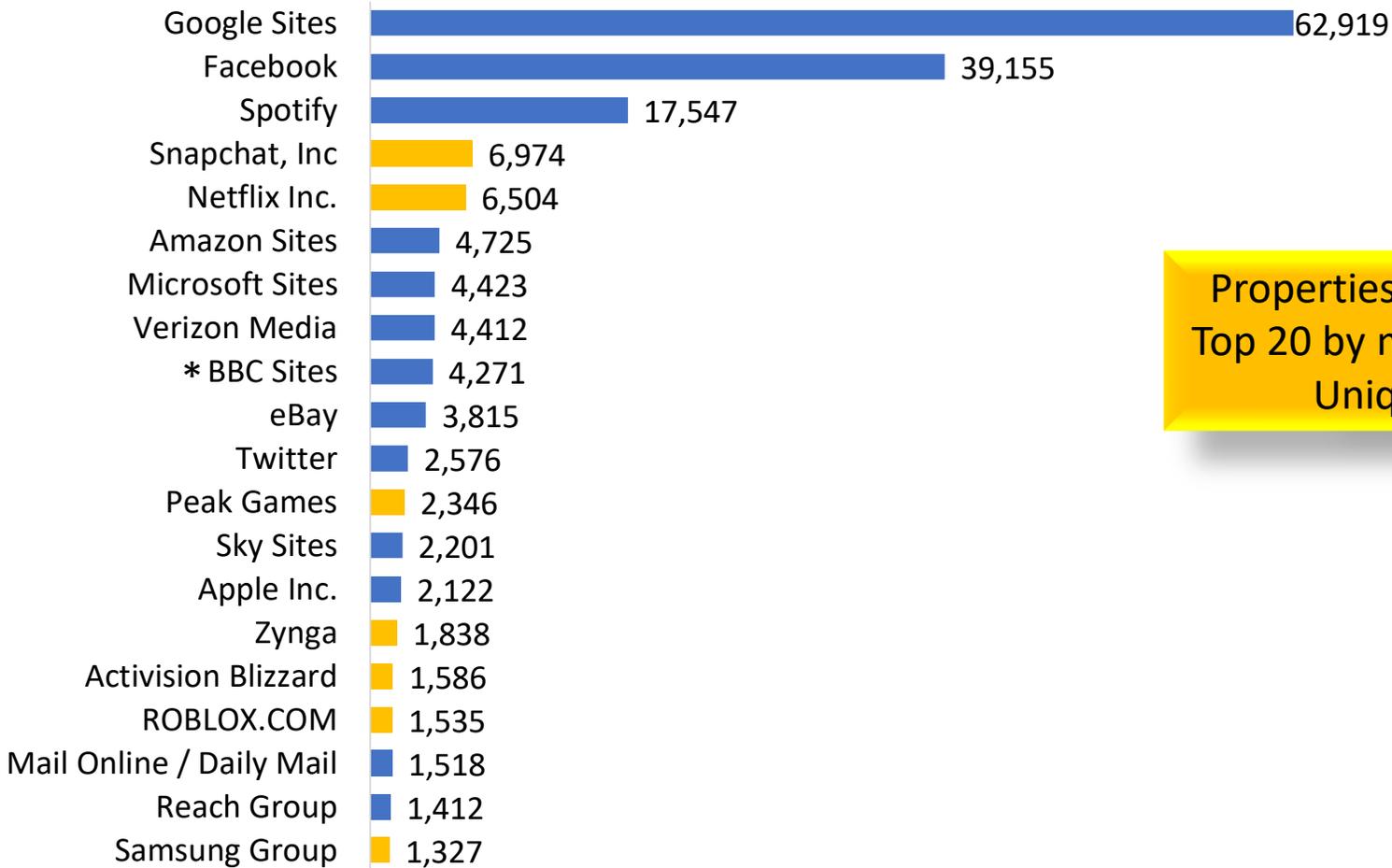


# Top 20 Properties by 'Time Spent\*' – Total Digital Population

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



Total Mins (MM) – Total Market = 281,323

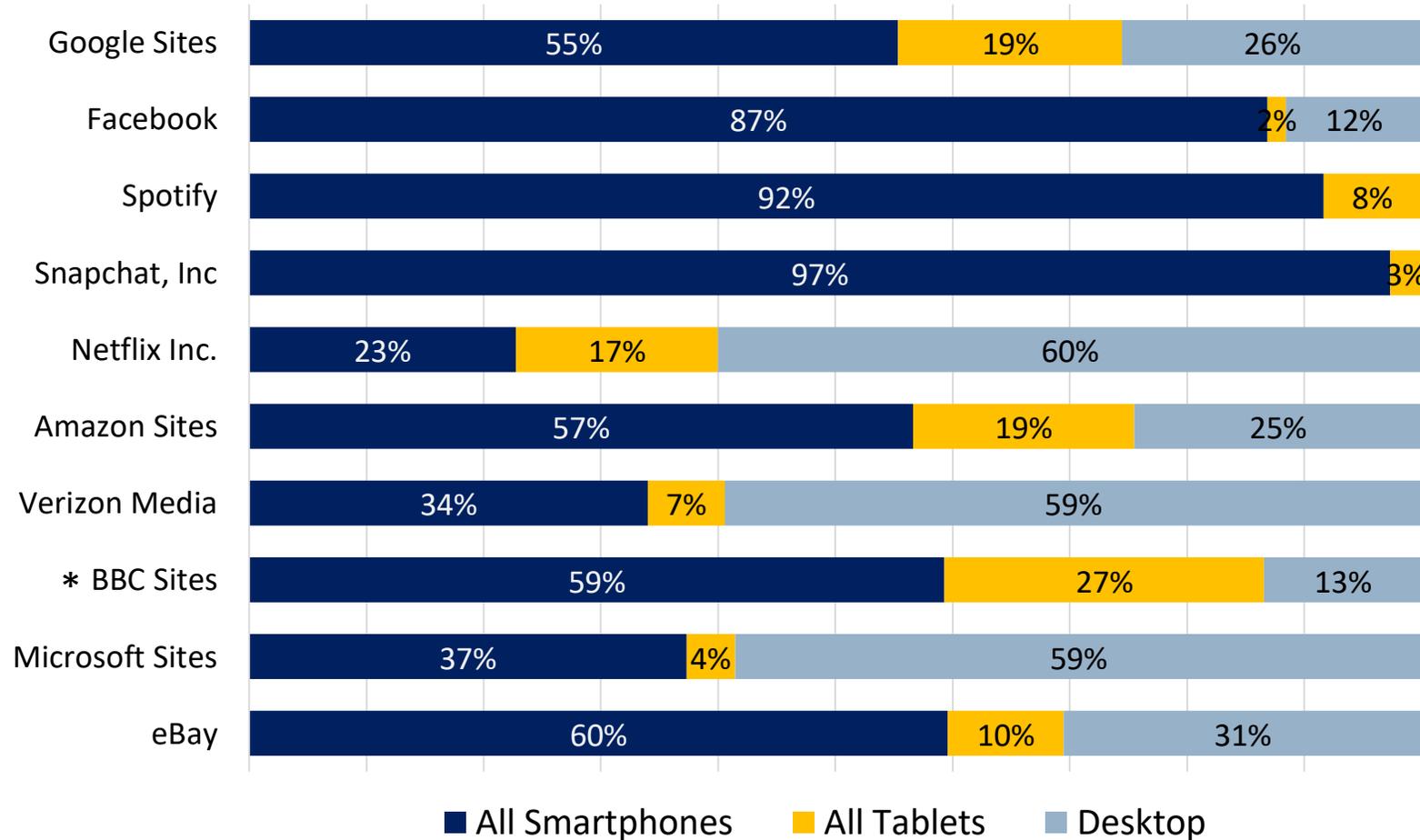


Properties in yellow rank in Top 20 by minutes but not by Unique Visitors.

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

Majority of time spent online for Microsoft, Netflix and Verizon Media is on the desktop

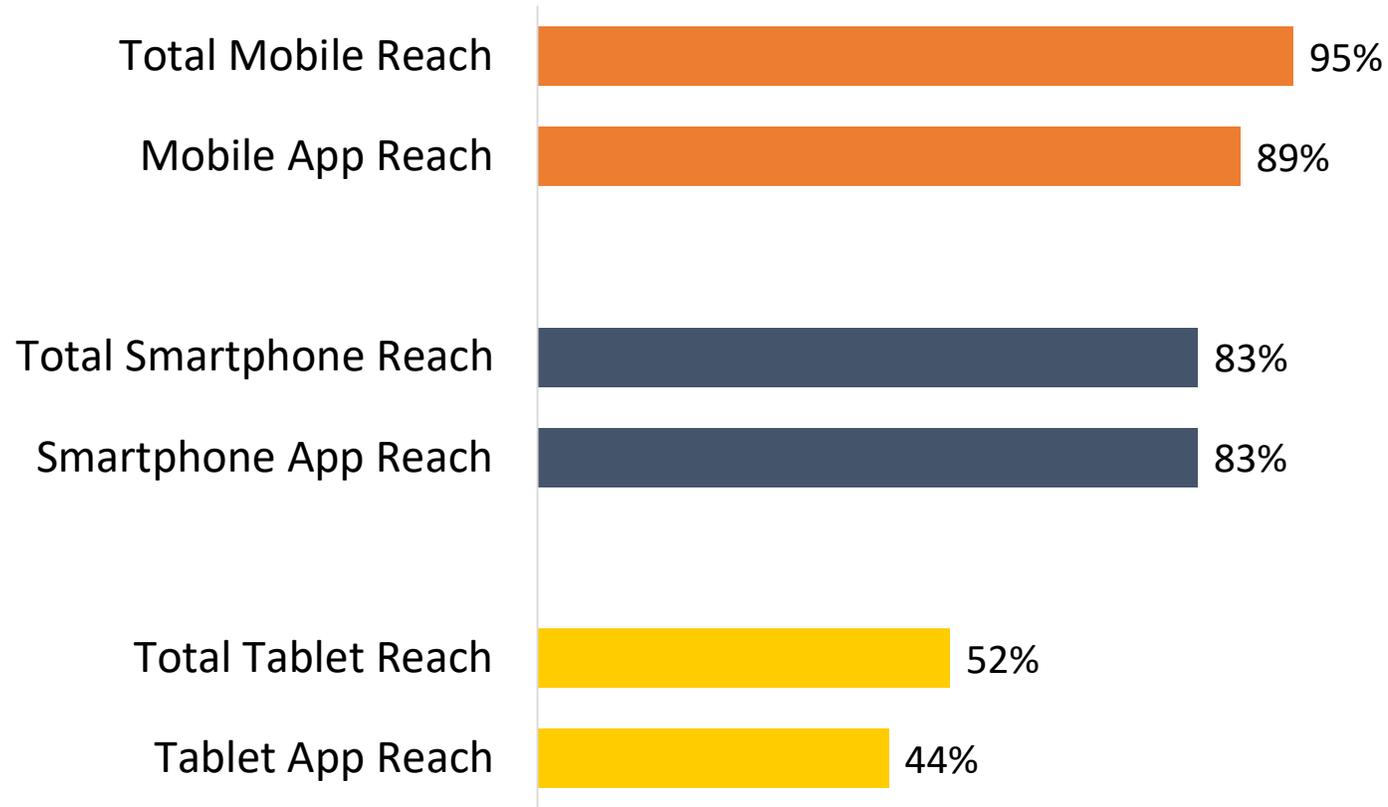


# Mobile usage

# Mobile Reach by Platform & Access

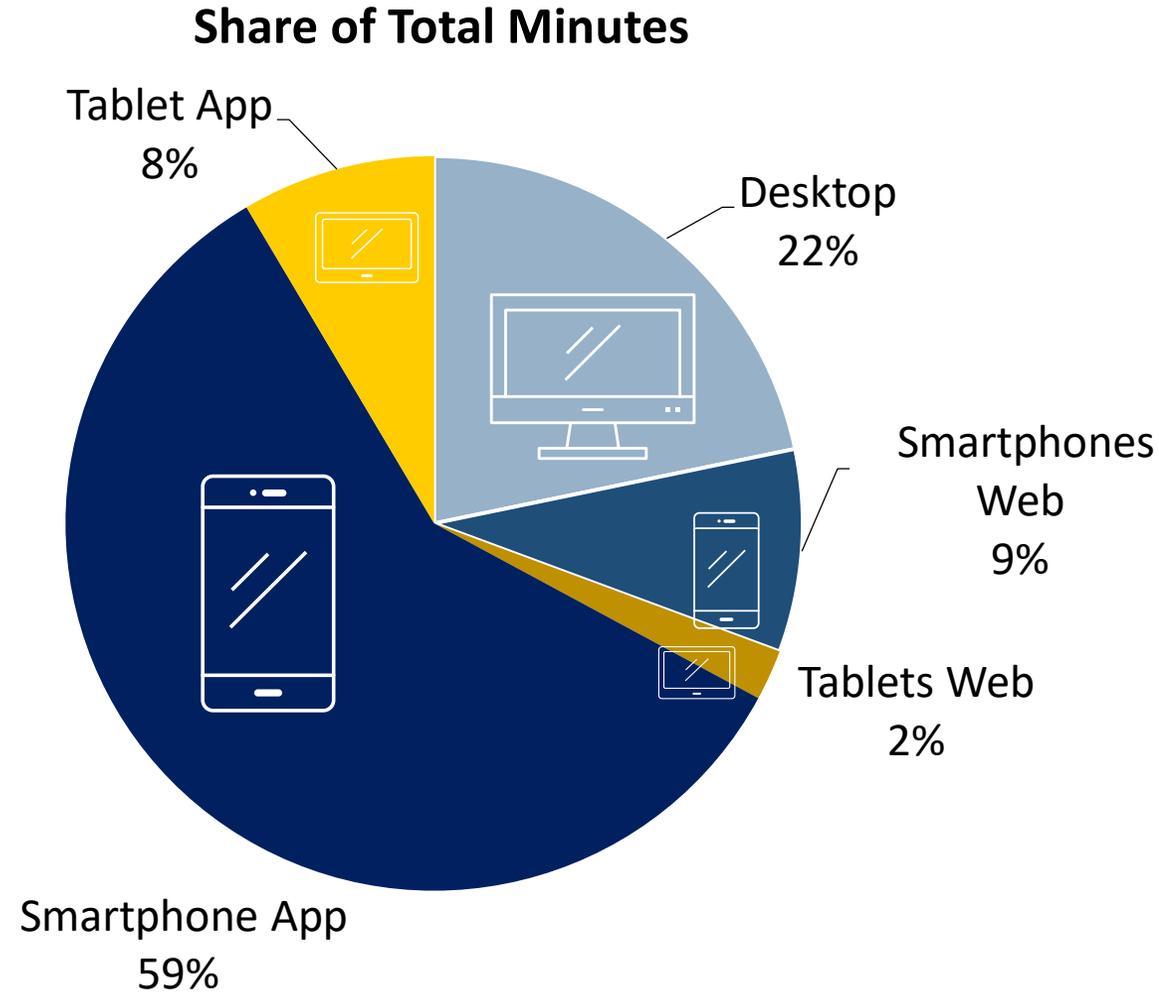
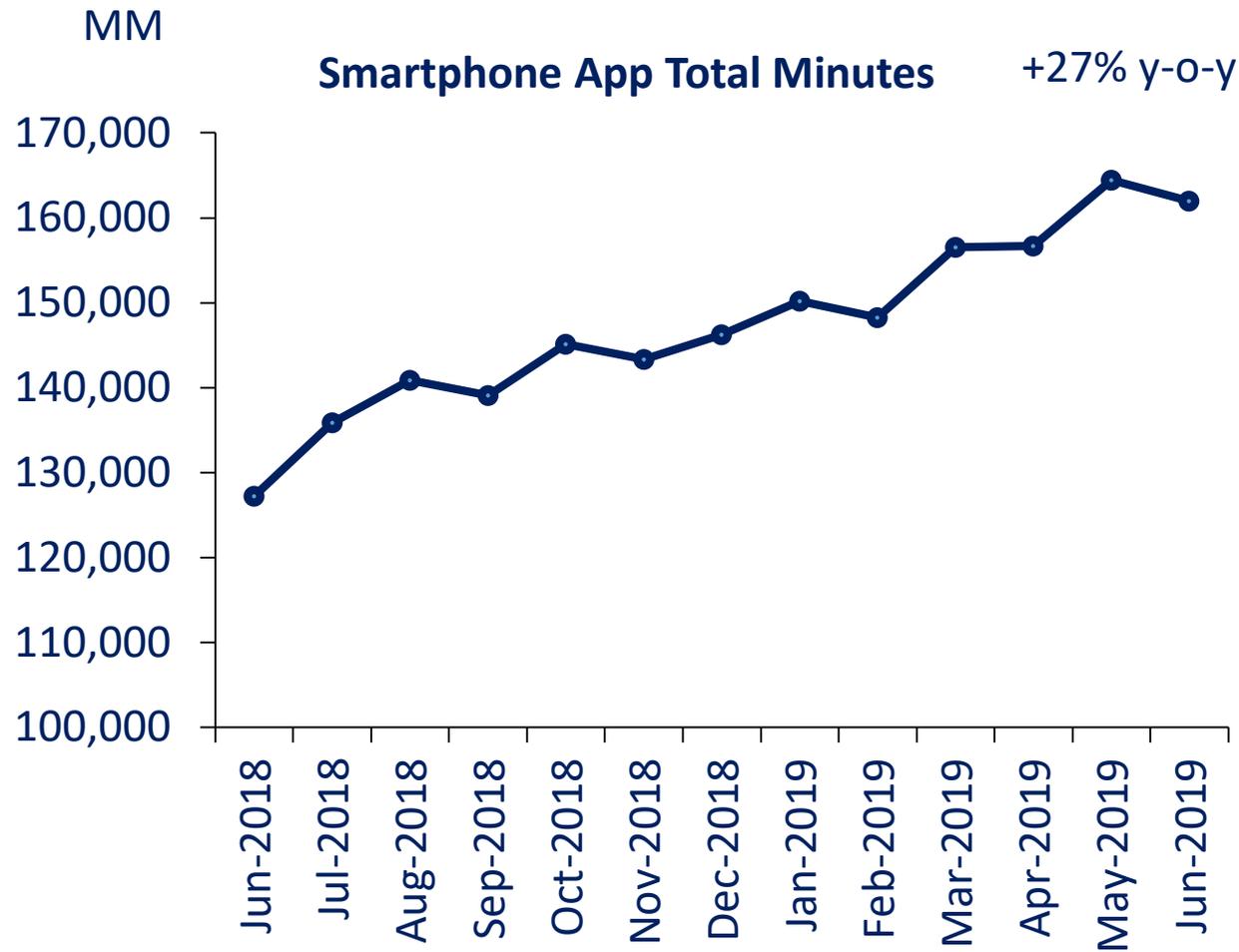
89% of the UK online adult population use mobile apps

Reach of Online UK Population - June 2019, 18+



# Minutes by Platform & Mobile Access

## Smartphone apps account for 59% of all Minutes



Source: Comscore MMX Multi-Platform, Jun 2019, 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



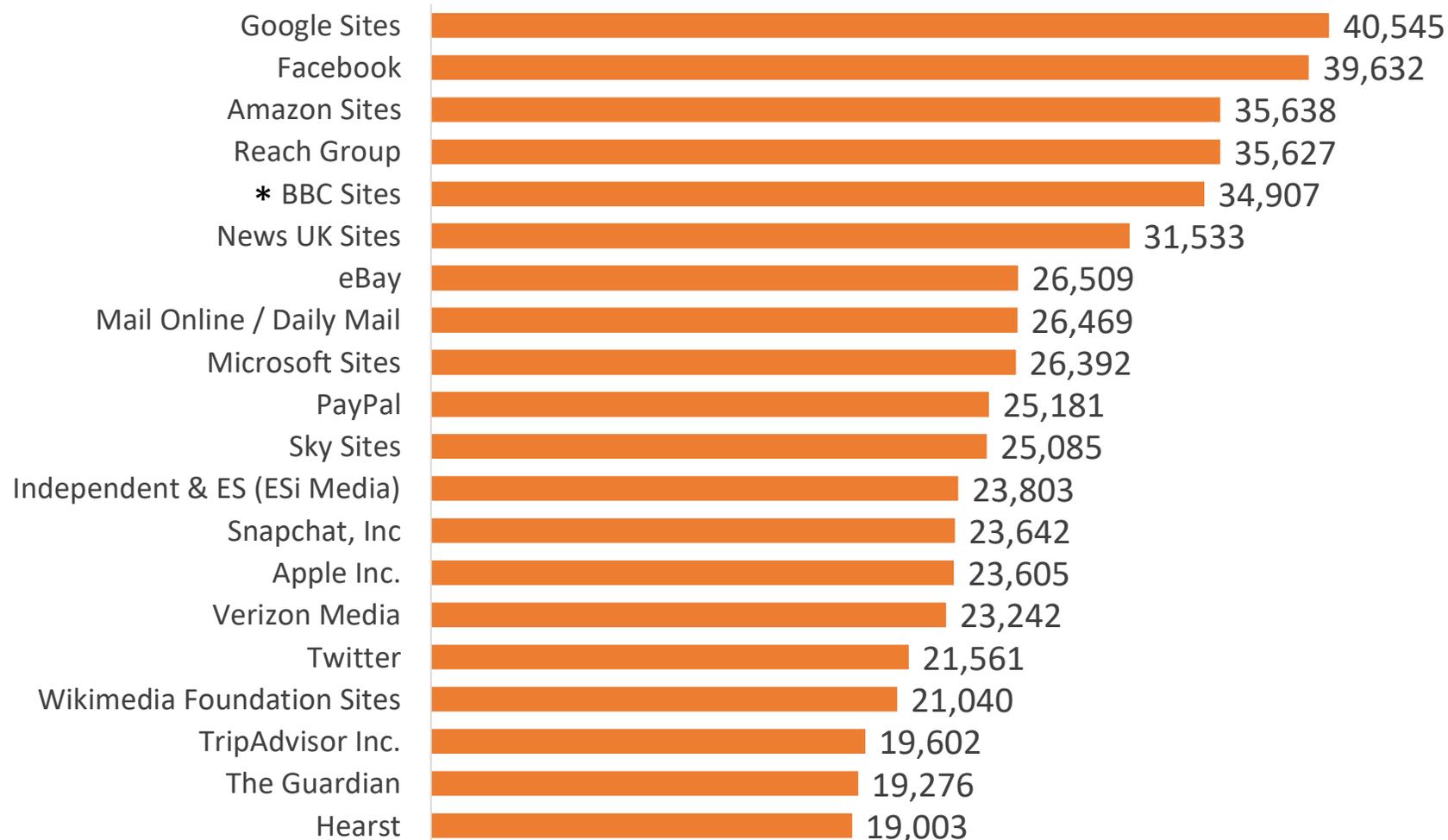
# Top Properties: Mobile Population

# Top 20 Mobile Properties ranked by Unique Visitors

42.1m adults accessed mobile content in Jun 2019 (via browser or app)



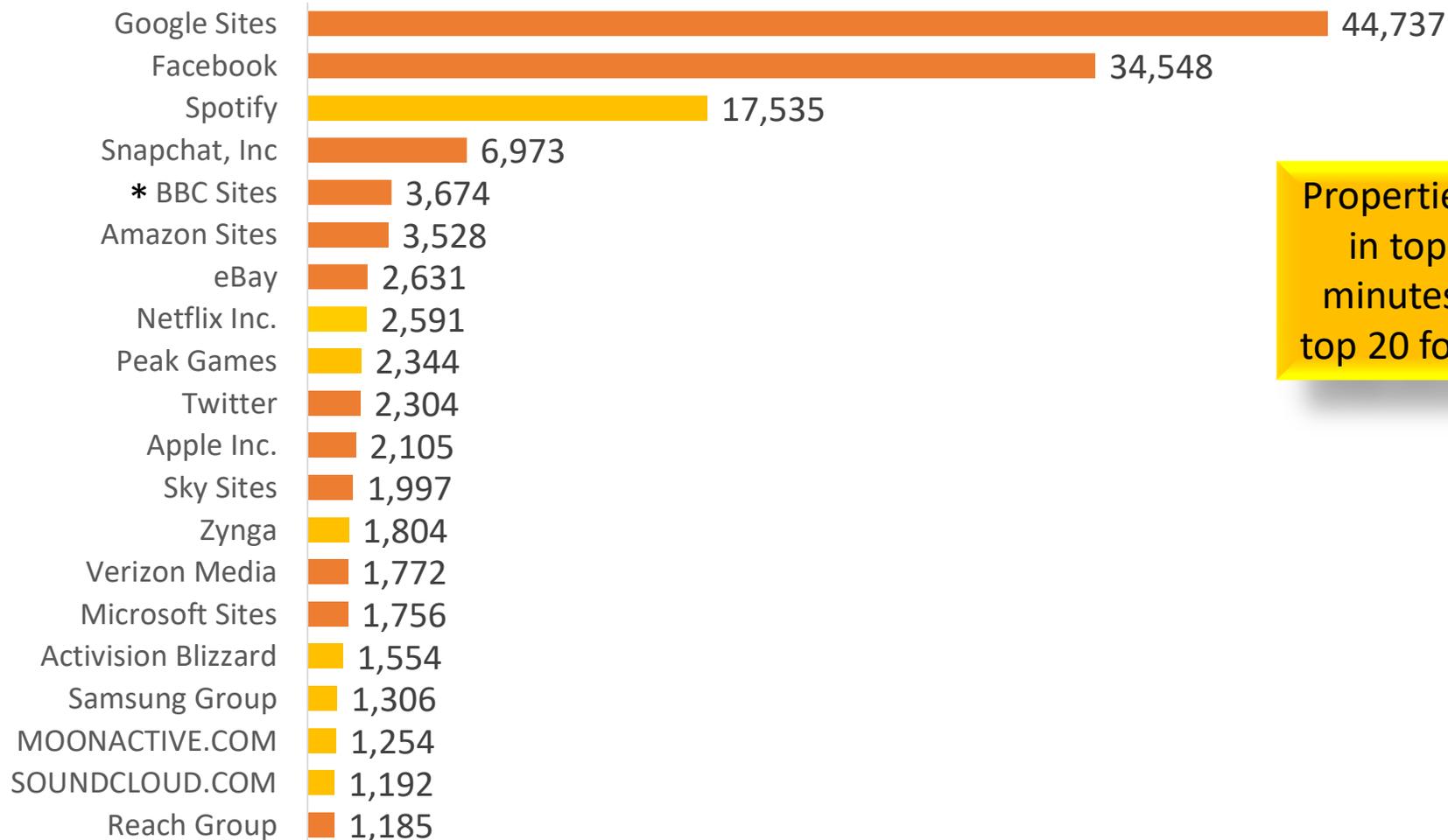
Total Unique Visitors/Viewers (000s) Total Mobile (18+) = 42,138



# 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+) = 216,323



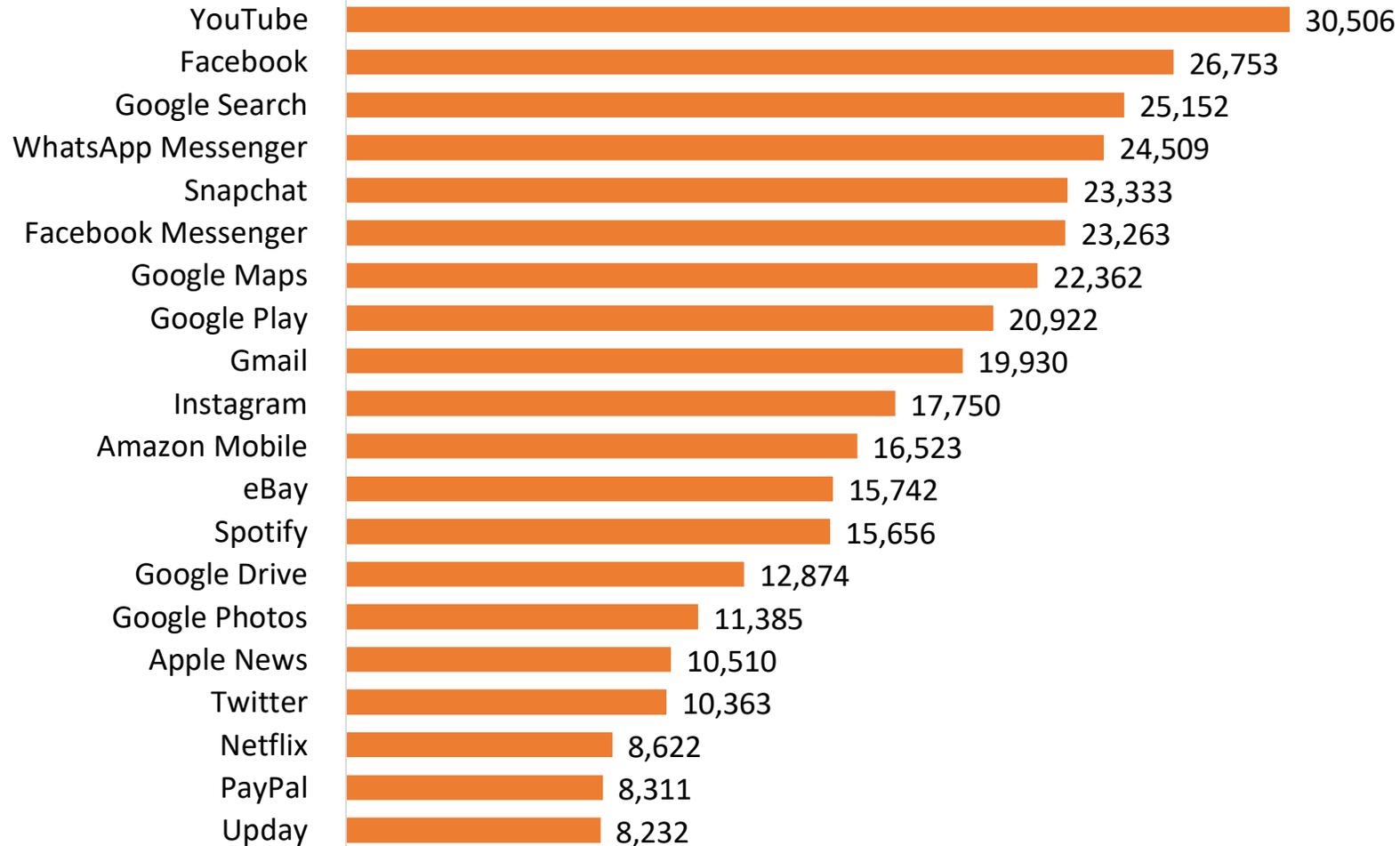
Properties in yellow rank in top 20 by mobile minutes but not in the top 20 for mobile visitors

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

## Global Brands dominate top 20 Apps

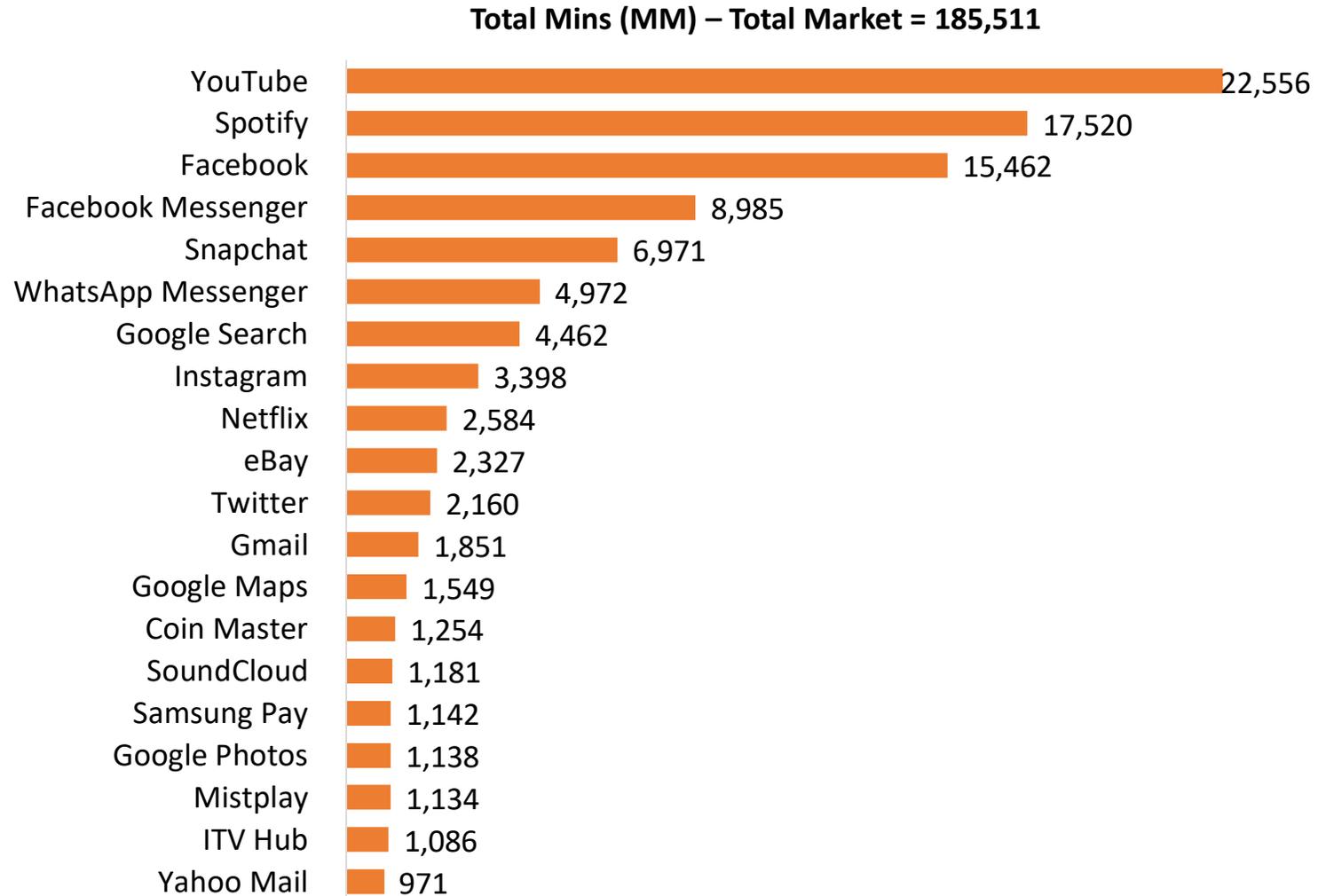


Total Unique Visitors/Viewers (000s) – Total Mobile App Users = 39.1m



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

## Spotify & Netflix 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	30.5
Facebook	26.8
Google Search	25.2
WhatsApp Messenger	24.5
Snapchat	23.3
Facebook Messenger	23.3
Google Maps	22.4
Google Play	20.9
Gmail	19.9
Instagram	17.7

### Smartphone Top 10



	(Million)
• YouTube	26.8
• Facebook	24.5
• WhatsApp Messenger	24.4
• Google Search	23.4
• Facebook Messenger	22.1
• Google Maps	21.2
• Google Play	20.9
• Gmail	19.0
• Snapchat	18.0
• Instagram	16.1

### Tablet Top 10



	(Million)
• Snapchat	7.2
• YouTube	5.7
• Facebook	3.2
• Google Search	2.4
• Instagram	2.3
• Netflix	2.3
• Spotify	2.2
• Apple News	2.0
• BBC Weather	1.9
• BBC IPlayer	1.8

# Top 10 Mobile Apps by Minutes by Mobile Platform

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

### Total Mobile Top 10



	(Billion)
YouTube	22.6
Spotify	17.5
Facebook	15.5
Facebook Messenger	9.0
Snapchat	7.0
WhatsApp Messenger	5.0
Google Search	4.5
Instagram	3.4
Netflix	2.6
eBay	2.3

### Smartphone Top 10



	(Billion)
• Spotify	16.1
• YouTube	15.6
• Facebook	15.1
• Facebook Messenger	9.0
• Snapchat	6.8
• WhatsApp Messenger	5.0
• Instagram	3.4
• Google Search	3.3
• eBay	2.0
• Twitter	2.0

### Tablet Top 10



	(Billion)
• YouTube	7.0
• Spotify	1.5
• Google Search	1.1
• Netflix	1.1
• ITV Hub	0.5
• YouTube Kids	0.4
• Amazon Prime Video	0.4
• Facebook	0.4
• BBC IPlayer	0.3
• eBay	0.3



# Categories

# Platform Share of Time Online by category

Platform time is influenced heavily by content and service



Desktop total

21%

Computer Software	79%
Fragrances/Cosmetics	76%
Education	70%
Entertainment - Movies	65%
Insurance	62%
Business to Business	62%
Investments	58%
Taxes	57%
Media	56%
Government	56%
Computer Hardware	51%
Politics	49%
Humor	48%
Kids	48%
e-mail	47%



Smartphone total

68%

• Instant Messenger	99%
• Job Search	96%
• Consumer Electronics	95%
• Car Transportation	94%
• Diet & Exercise/Fitness Tracker	94%
• Gay/Lesbian	93%
• Coupons/Incentives	92%
• Payments	91%
• Maps/GPS/Traffic	90%
• Retail - Music	89%
• Entertainment - Music	88%
• Social Media	87%
• Health	87%
• Dating	86%
• Religion/Spirituality	84%



Tablet total

11%

Kids	30%
Family & Youth	25%
Books	23%
General News	20%
Entertainment	19%
Forums/Message Boards	17%
Real Estate	15%
Search/Navigation	15%
Online Gaming	15%
Games	14%
Family & Youth Education	13%
Politics	13%
Entertainment - News	12%
Local News	12%
Travel Information	12%

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

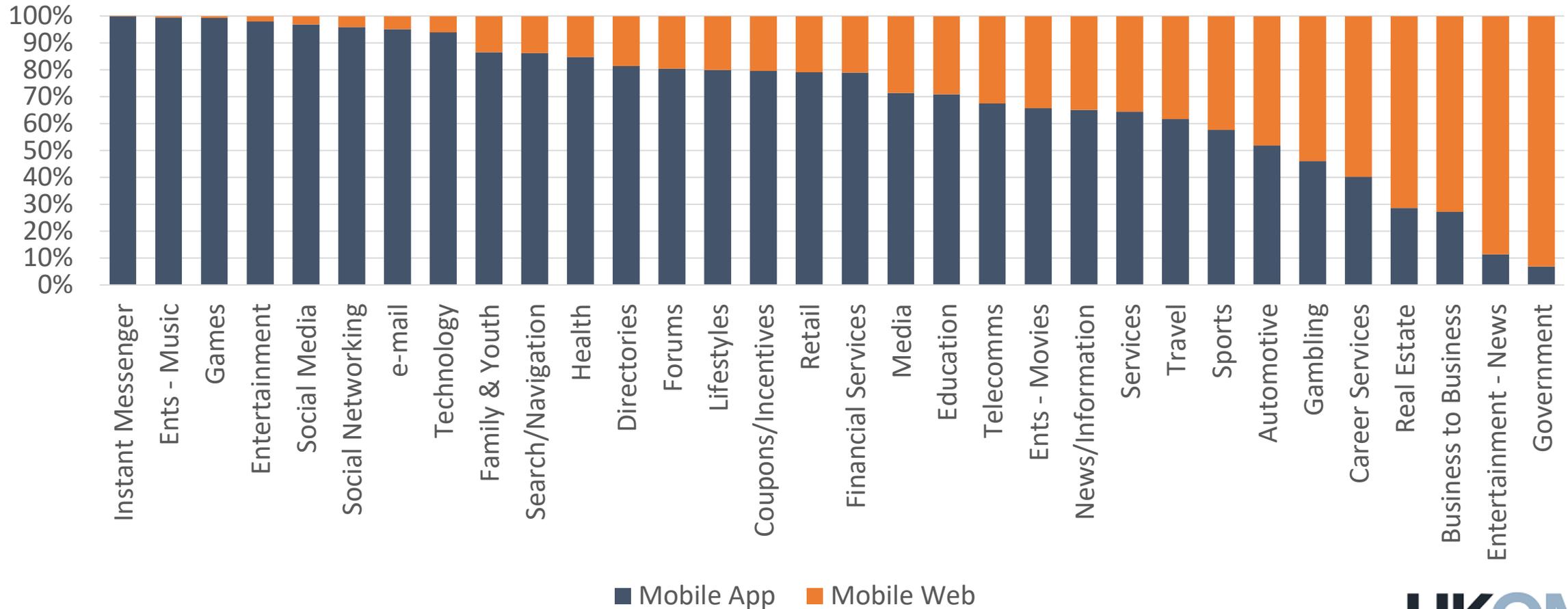
MMX Multi-Platform includes desktop browsing, desktop video streams, smartphone browsing & apps, tablet browsing & app

# Share of Mobile Minutes by Access Type by Category

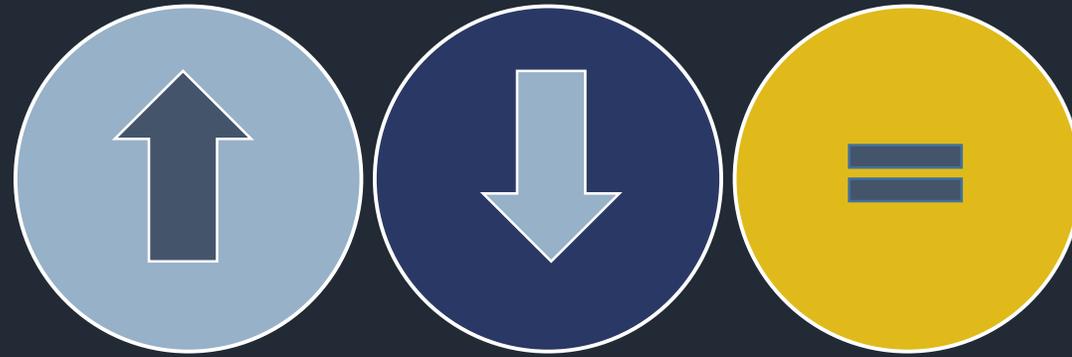
## Mobile App share of minutes varies by content & service



Mobile App v Mobile Web Share of Mobile Minutes

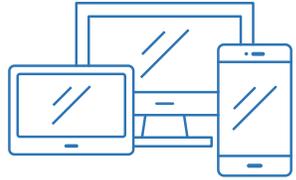


Source: Comscore Mobile Metrix, Jun 2019, UK, Age 18+  
Please note that 'mobile' includes smartphone and tablet usage combined

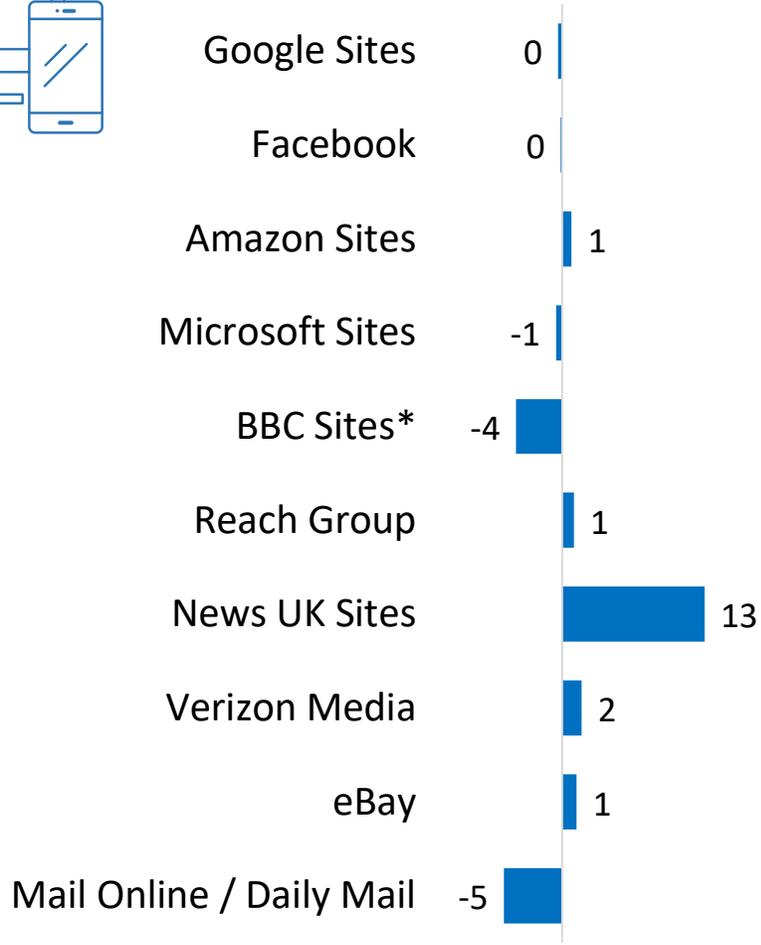


Key Changes: Jun 19 v Mar 19

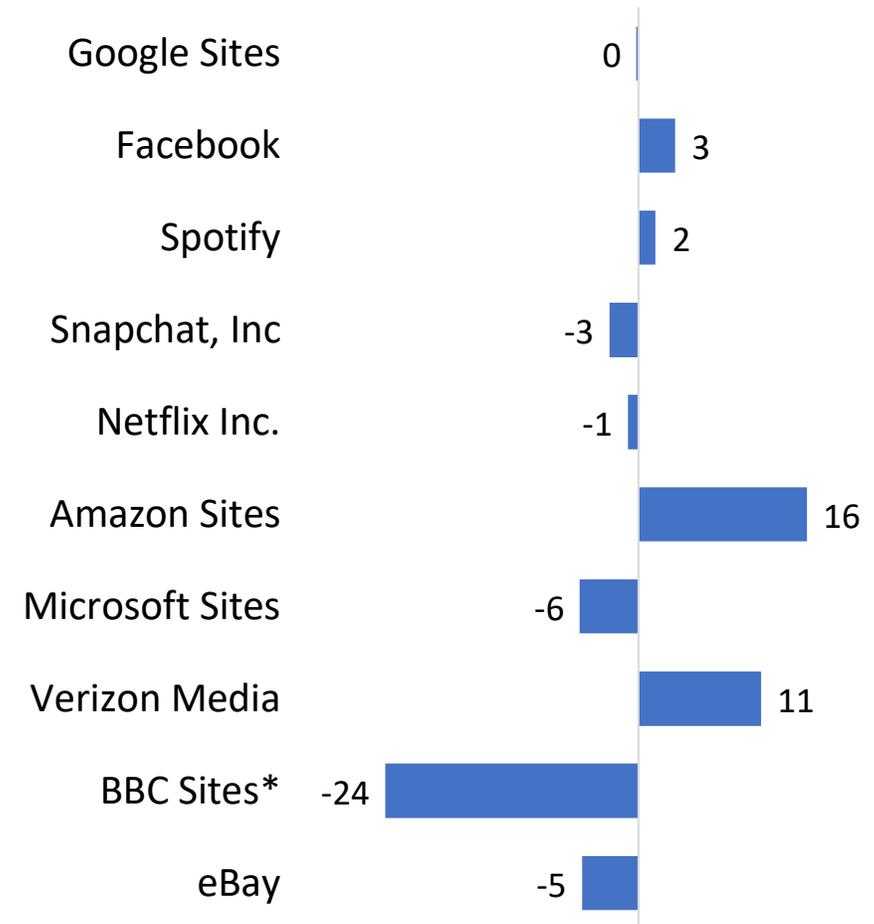
# % Change for Top Unique Visitor and Time Spent Properties: Jun 19 v Mar 19



## Top 10 Unique Visitor Properties: UV % Change

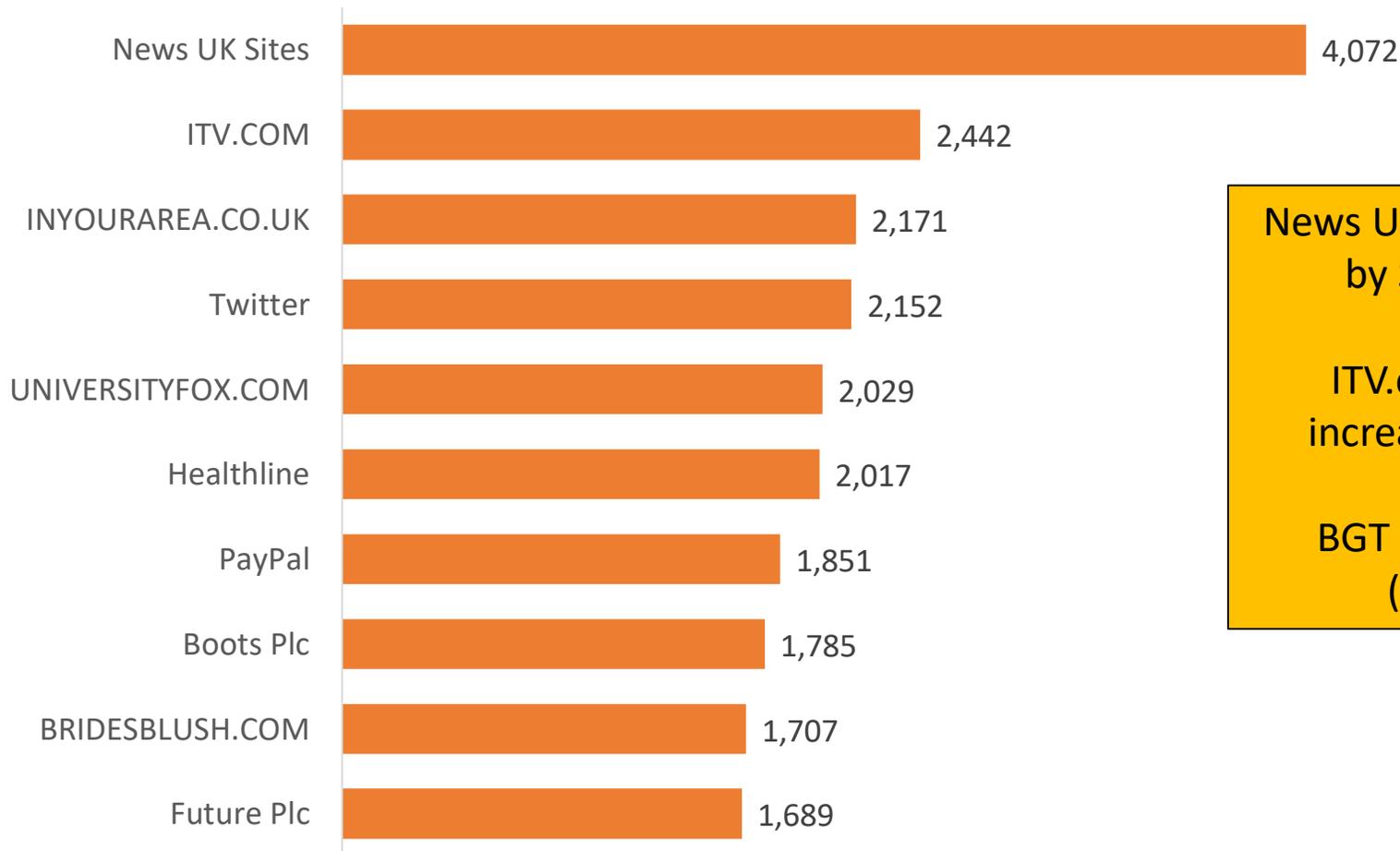


## Top 10 Time Spent Properties: Minutes % Change



# Properties which had high Unique Visitor Growth: Mar 19 to Jun 19

Additional Audience (000s) – Mar 18 to June 18



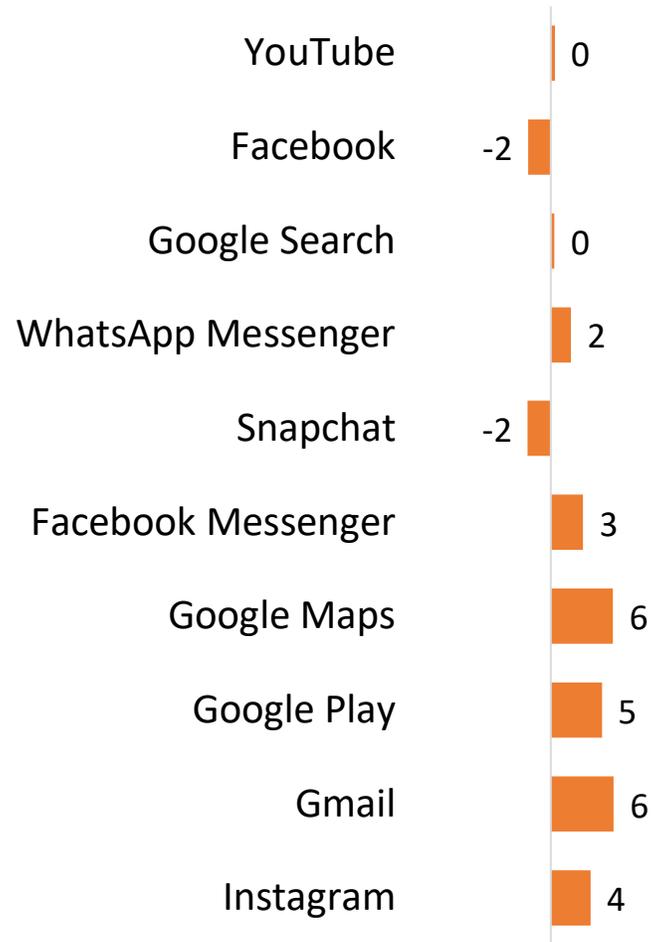
News UK increase primarily driven by Sun Sport, up by 4.3m

ITV.com increase driven by increases to ITV Hub (+500k), ITV News (+500k) and BGT (+983k) and Love Island (+933k) mobile apps

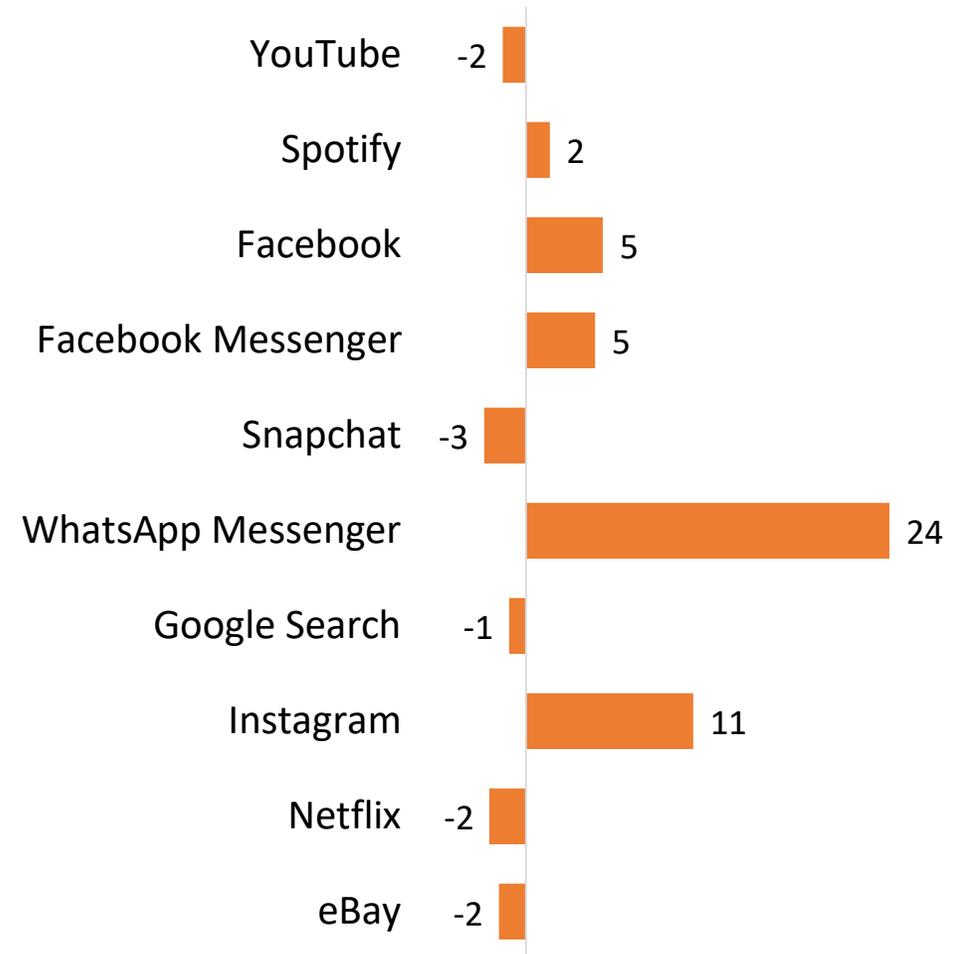
# % Change for Top Unique Visitor and Time Spent Mobile Apps: Jun 19 v Mar 19



## Top 10 Unique Visitor Mobile Apps: UV % Change

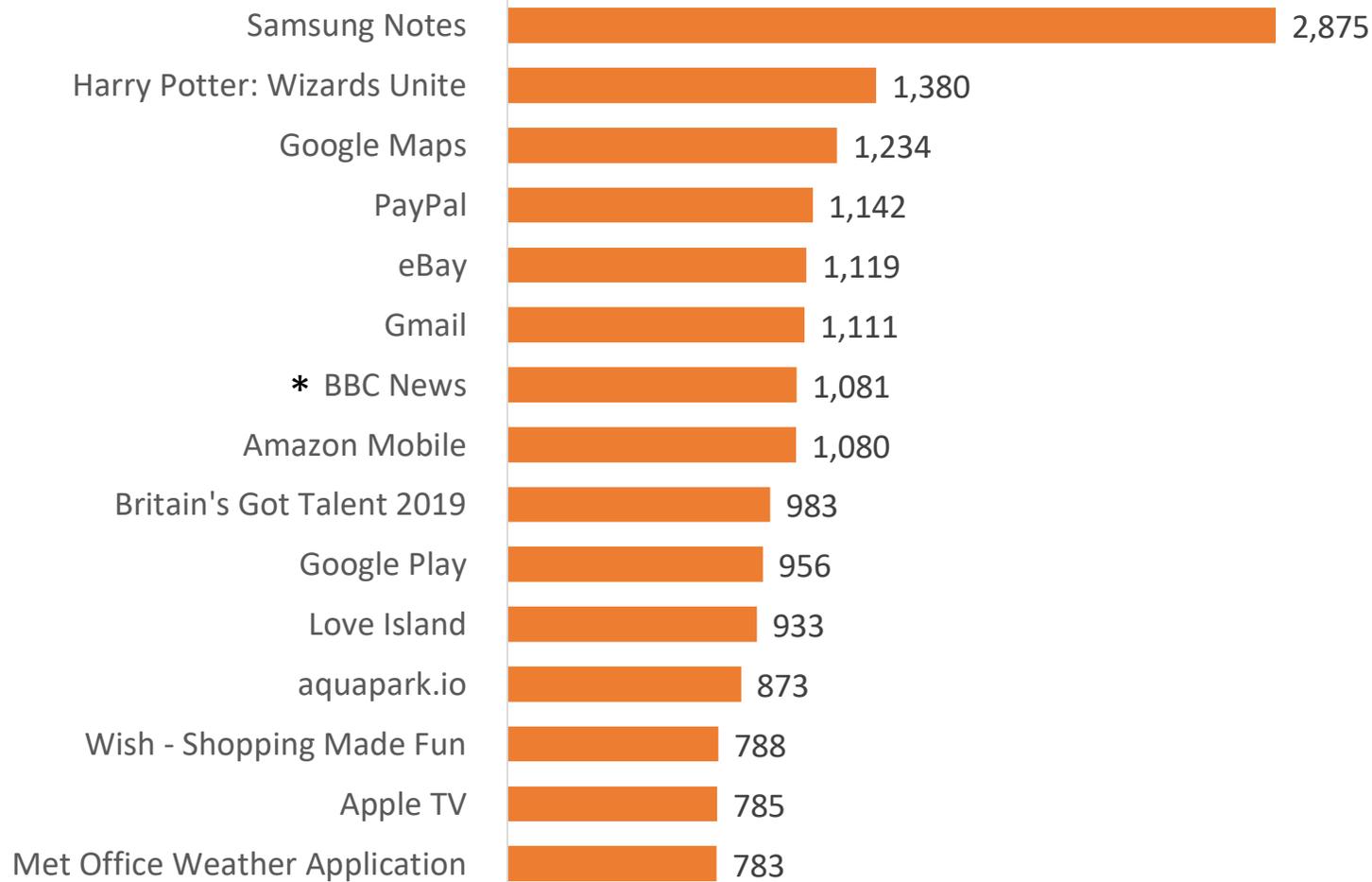


## Top 10 Time Spent Mobile Apps: Minutes % Change



# Mobile Apps which had high Unique Visitor growth: Mar 19 to Jun 19

## Additional 18+ Audience (000s) – Mar 19 to June 19



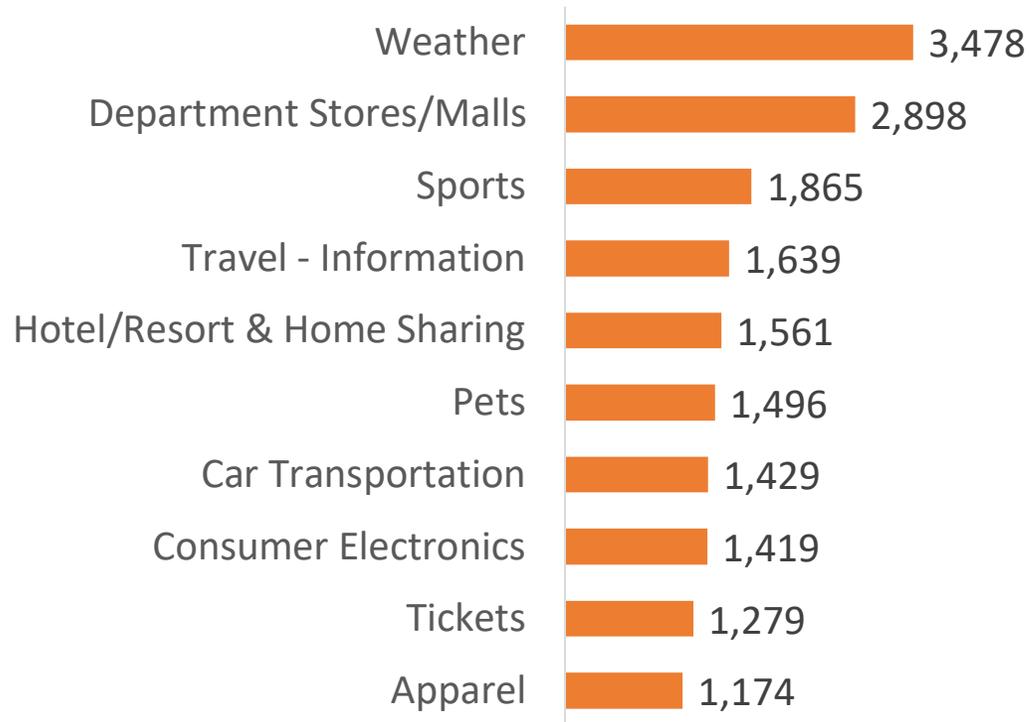
Britain's Got Talent and Love Island mobile apps, both had just shy of 1 million 18+ visitors in June 2019

Mobile AR Game Harry Potter: Wizards Unite which launched on 21<sup>st</sup> June had 1.4m app visitors in June

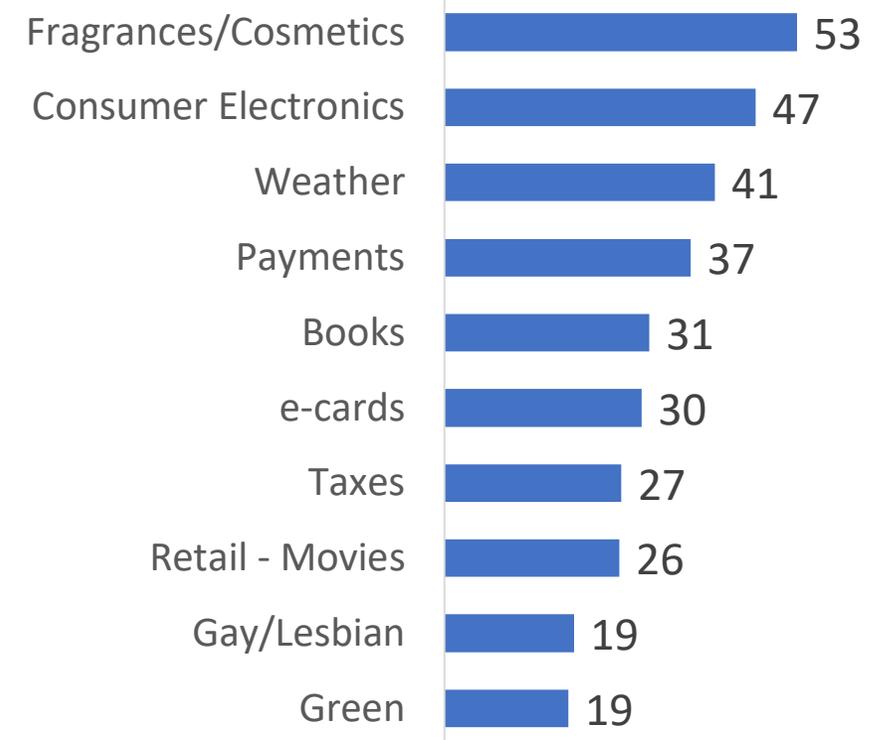
# Top Performing Categories based on Visitor Growth Jun 19 v Mar 19

## Category UV Growth – Jun 19 v Mar 19

### Unique Visitor 000s Increase: Jun 19 v Mar 19

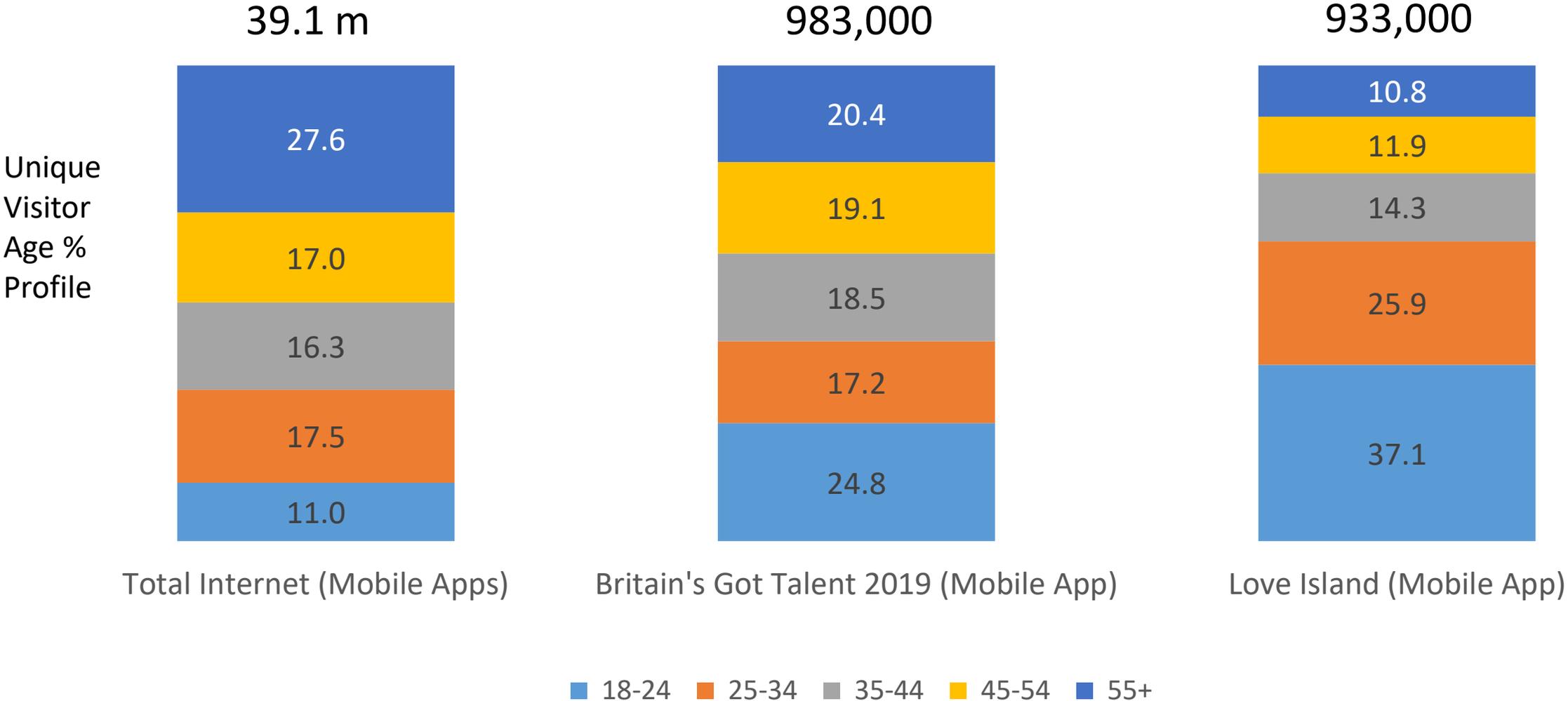


### Unique Visitor % Increase: Jun 19 v Mar 19



# ITV BGT and Love Island Mobile App Audience Profile: June 2019

## Same Channel, Same Platform, Same Size but Different Age Profile



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