



# The Digital Future In Focus

“Understanding the customer journey, behaviour, trends and platforms”

Chris Thomson, Enterprise Director

Interesting fact.....



**Interesting fact.....**

**How many toothbrushes are there in the  
World?**



Interesting fact.....

How many toothbrushes are there in the  
World?

**3.5 Billion**

**Interesting fact.....**

**How many mobile phones are there in the  
World?**



Interesting fact.....

How many mobile phones are there in the  
World?

**4 Billion**

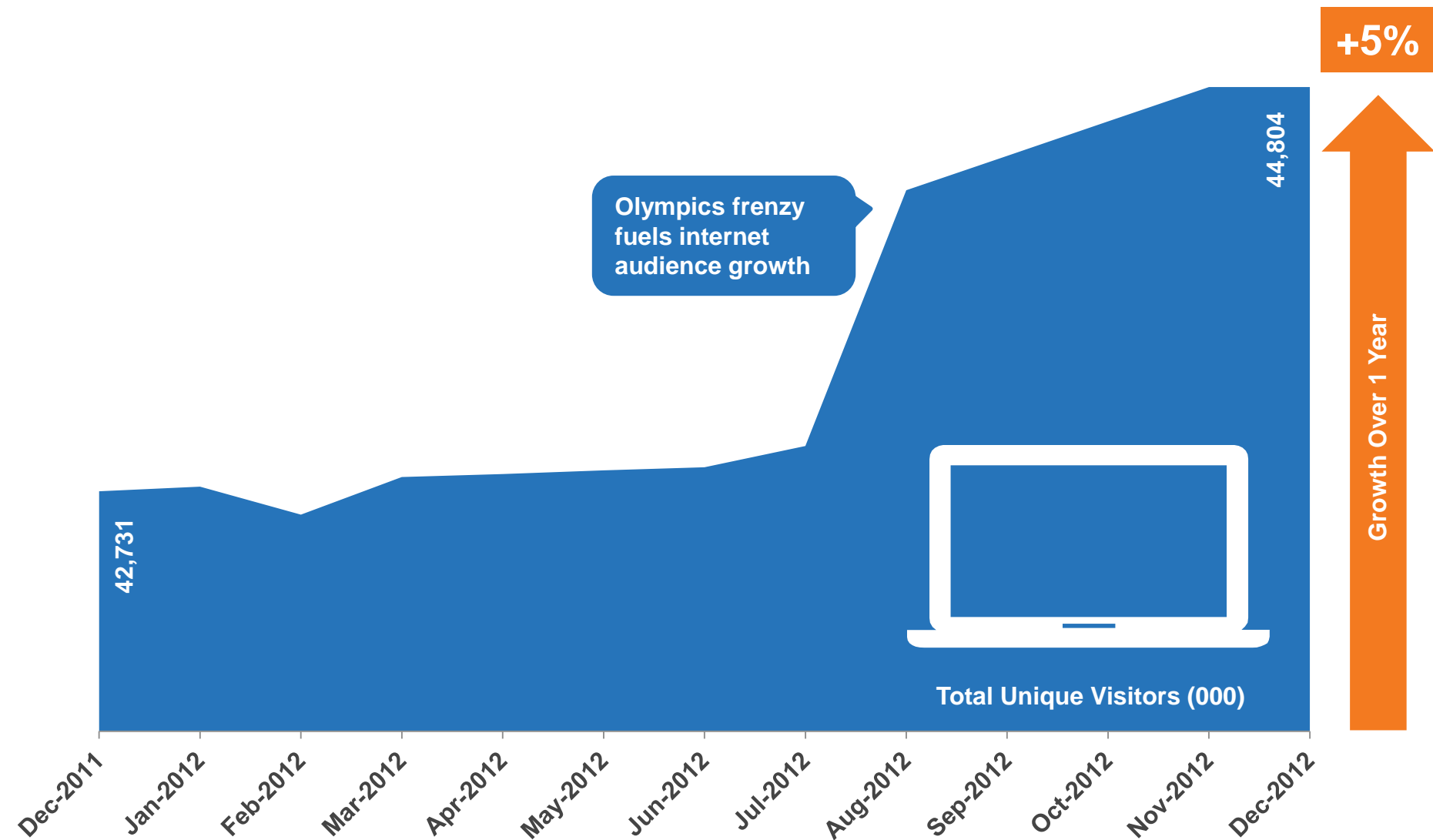
# We are entering the dawn of a brave new digital world...

## Media Fragmentation is occurring at light-speed in today's multi-platform environment which features:

- TVs and Computers
- Smartphones
- Tablets
- Gaming Platforms
- New devices coming to market

# UK Online Population on the Up

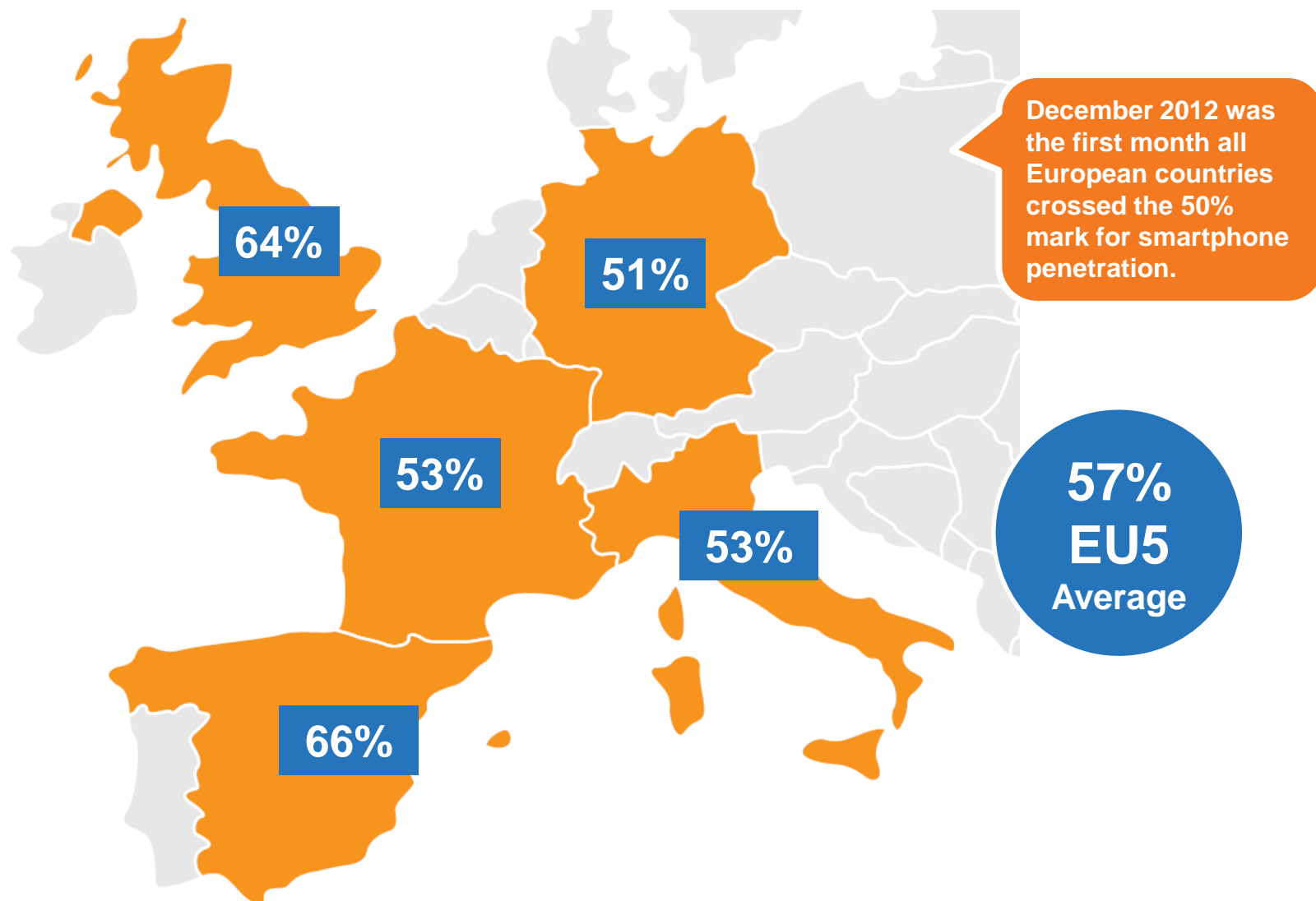
44.8 Million Brits Surfing the Web via a Home or Work Computer



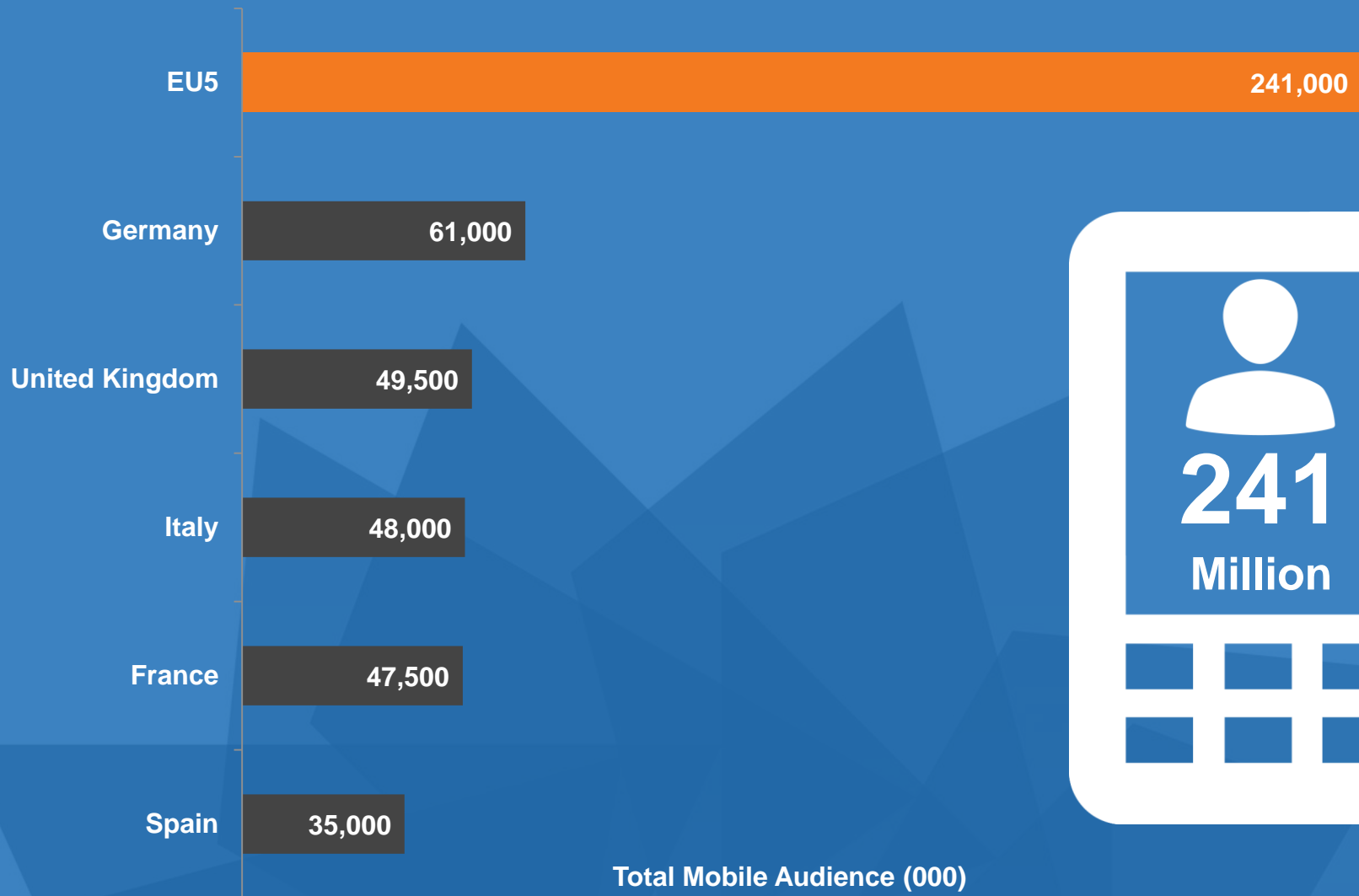


# Smartphone Penetration in EU5 at 57%

## 64% of UK Mobile Owners Use a Smartphone

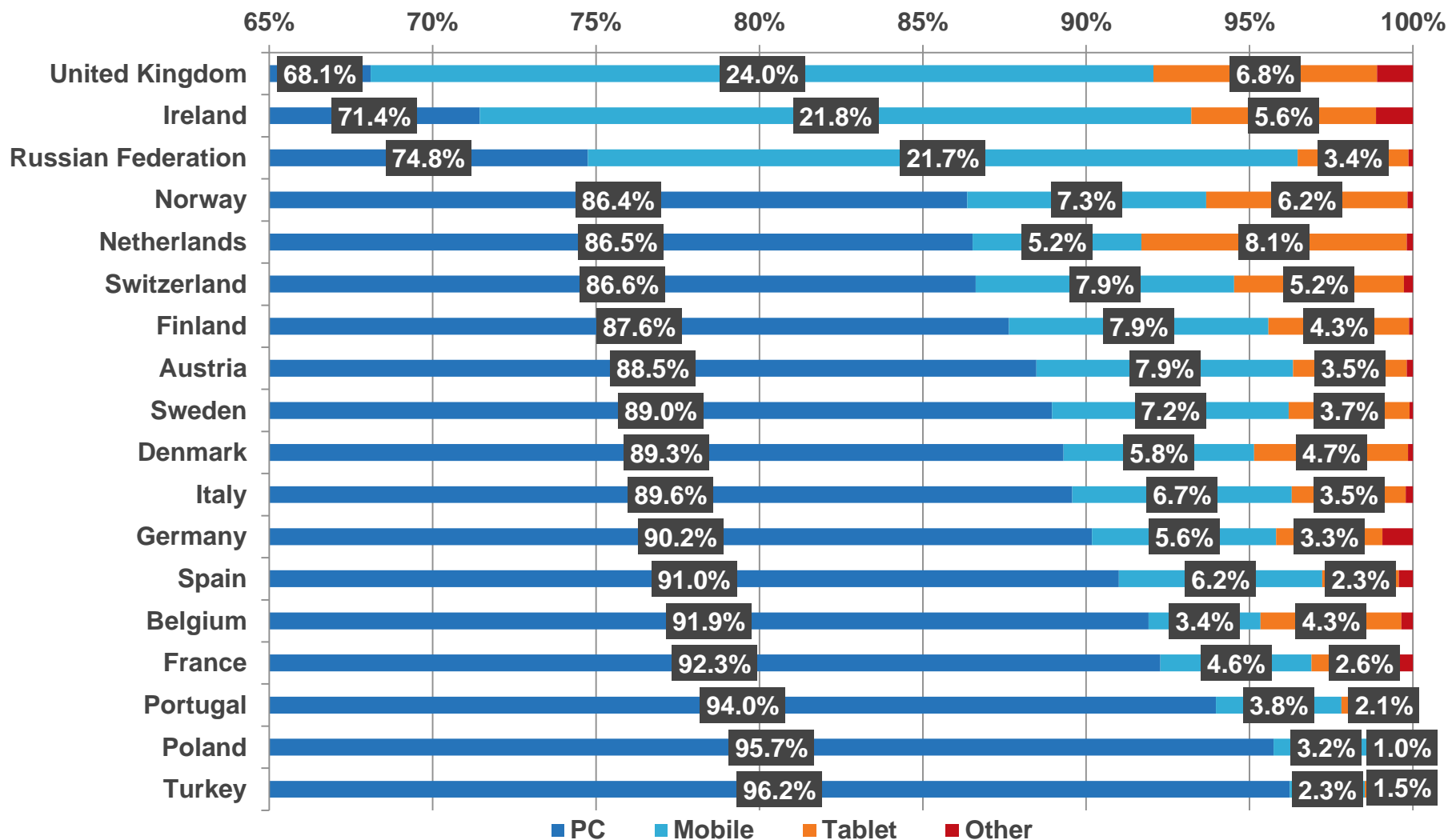


# Mobile Audience in EU5 Crosses 240 Million Mark

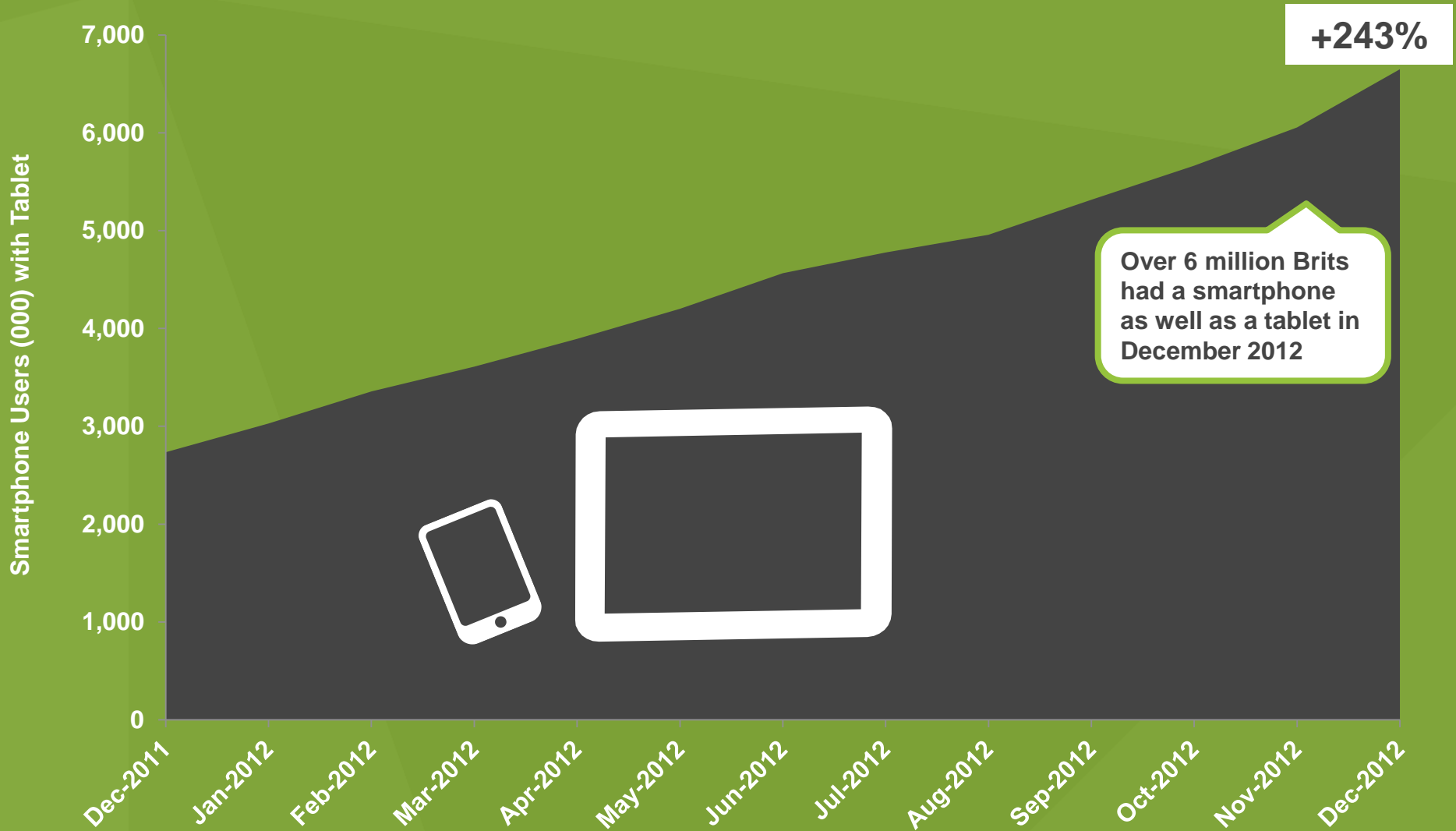


# Device Share of Page Views Across Countries in Europe

## Nearly 1/3 of UK Page Views are from Mobiles and Tablets



# Tablets Are Here to Stay



# We are entering the dawn of a brave new digital world...

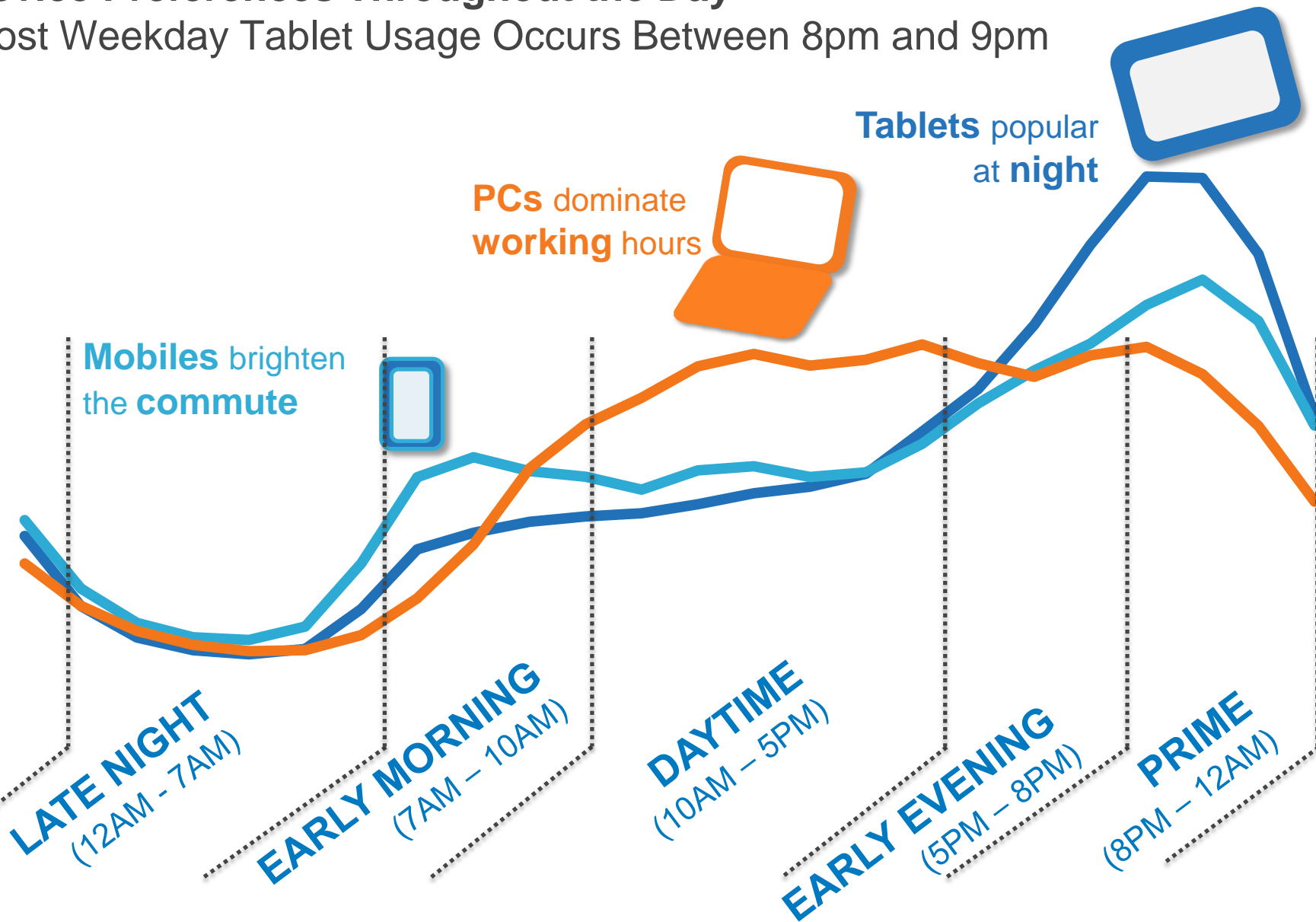
“This new paradigm offers consumers a seamless digital experience that can easily traverse platforms, locations and temporal constraints”

- **Content can be experienced anytime, anyplace**
- **The average consumers screen time across devices expands to fill in many of these available gaps throughout the day.**
- **There are more opportunities than ever before for marketers to reach, engage and measure.**

# Device Preferences Throughout the Day

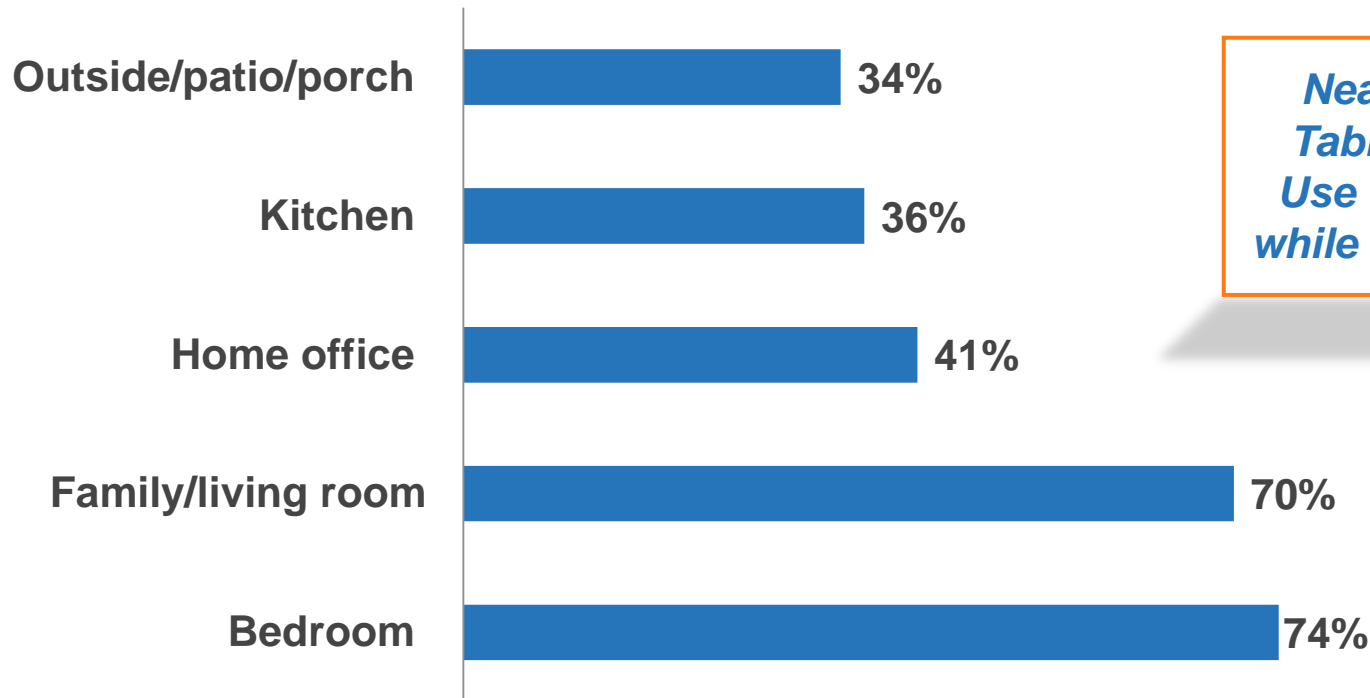
Most Weekday Tablet Usage Occurs Between 8pm and 9pm

Share of Device Page Traffic on a Typical Workday



# Tablets - Companions on the Sofa + in Bed in U.S. Homes

## Location of Tablet Use at Home



*Nearly half of Tablet Owners Use their Tablet while watching TV*

# The Digital Future In Focus

The customer journey is invaluable to:

- Publishers
- Agencies
- Banking
- Broadcasters
- Gaming companies
- Travel companies

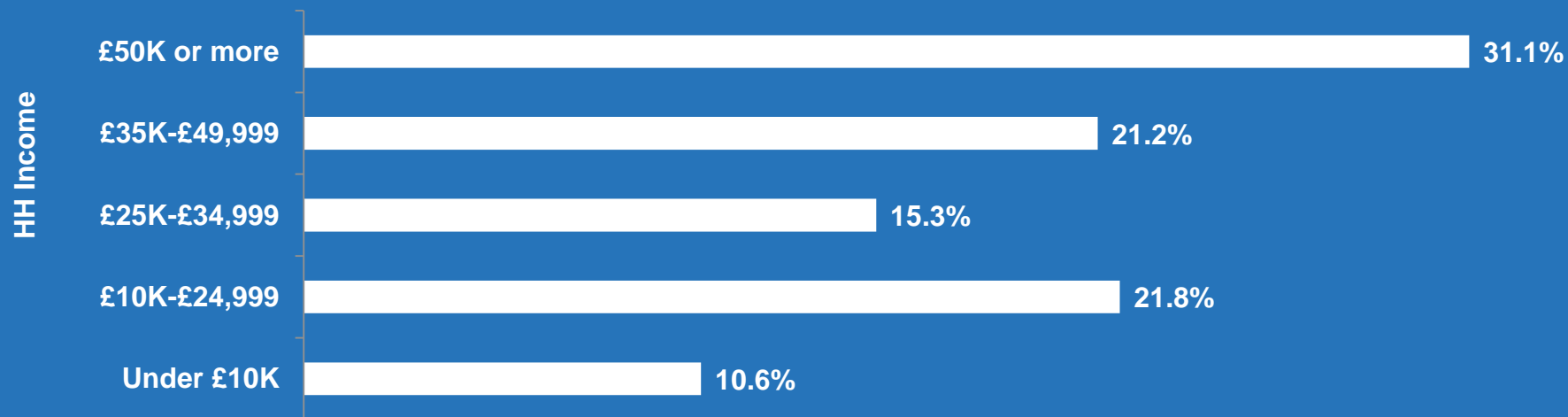
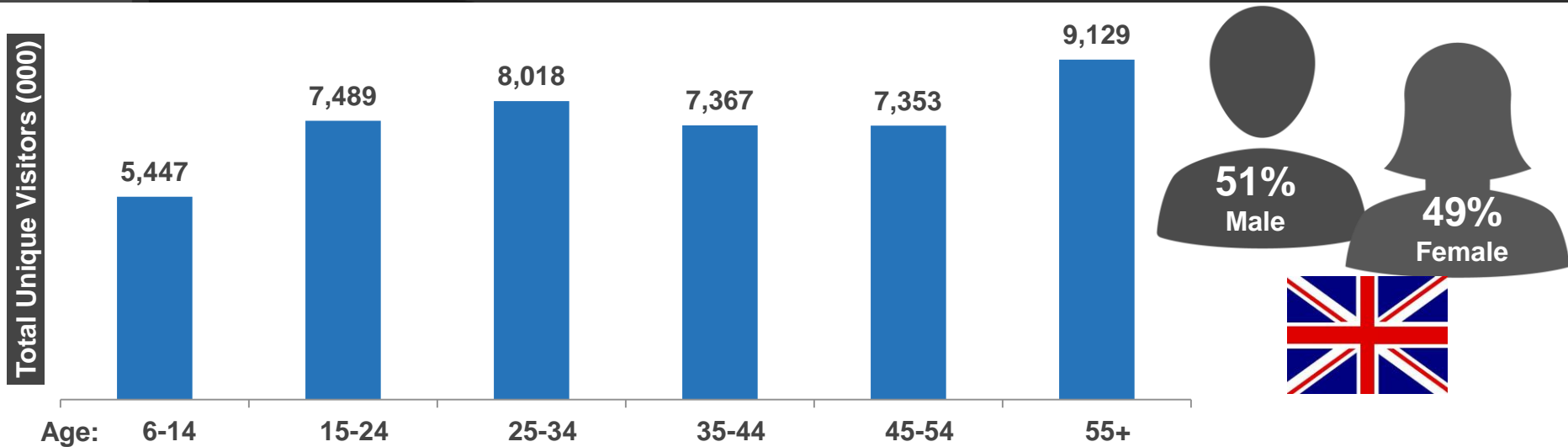




# The Digital Future In Focus

- **If we are targeting certain people with related content then then we need to know the breakdown of the population demographic including sex, social class and sometimes region**
- **Most digital organisations will be European or Global and so this information will be required in multiple countries or regions**

# Profile: UK Online Audience

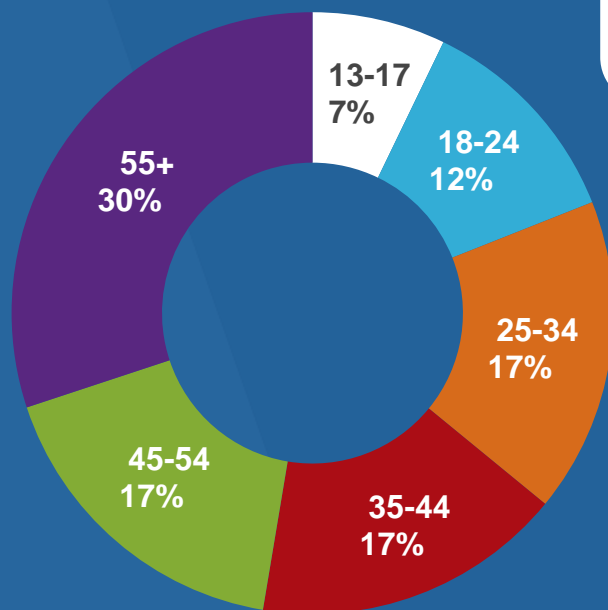


# UK Mobile Landscape

Nearly ¼ of British Smartphone Audience are Between 25 and 34 Year Old

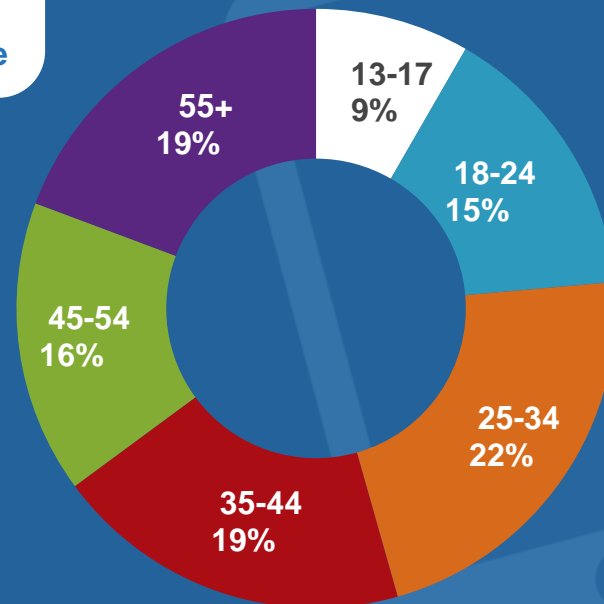
Total UK Mobile Audience: 49.5 million

### Age Composition of Mobile Audience



Total UK Smartphone Audience: 31.7 million

### Age Composition of Smartphone Audience

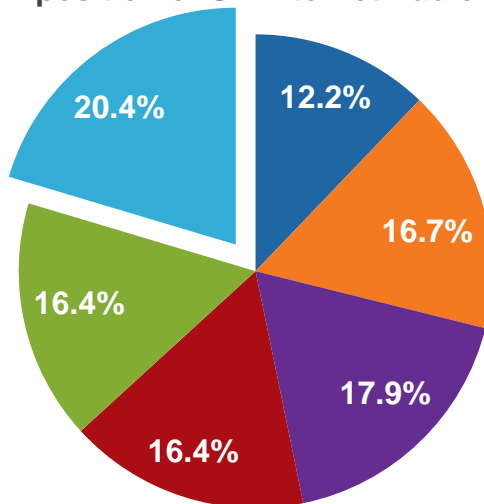


The gender split for smartphones is identical to the UK online audience: 51% male, 49% female

# Silver Surfers – Understand the Largest Group of UK Internet Users

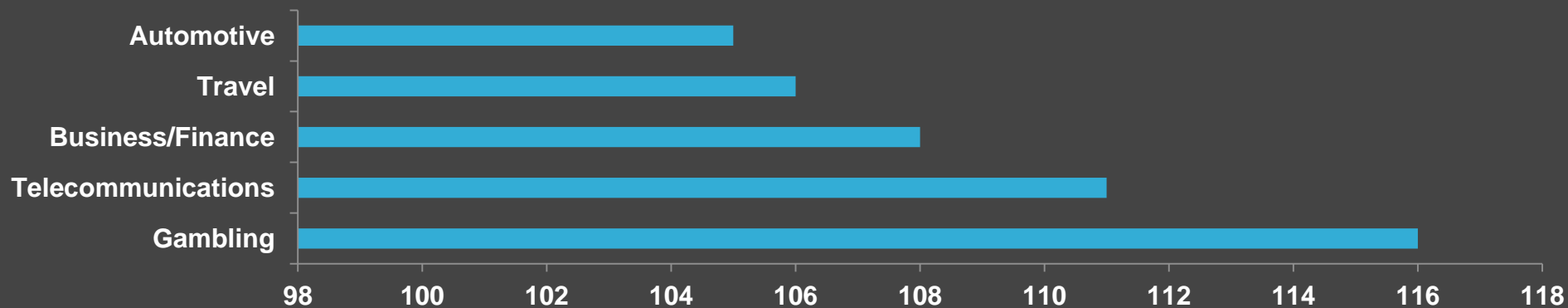
Composition of UK Internet Audience

- Persons: 6-14
- Persons: 15-24
- Persons: 25-34
- Persons: 35-44
- Persons: 45-54
- Persons: 55+



During 2012, the internet audience aged over 55 years grew by 11% to 9.1 million. Total time spent for this age group even grew by 25%.

Index\* for 55+ Year Olds – Likelihood compared to Total Internet Audience



Source: comScore MMX, December 2012, UK 6+

\*\*Composition Index = % of Online Visitors by Demographic Segment / % of Total Internet Users from the Demo Segment x 100; Index of 100 indicates average representation.

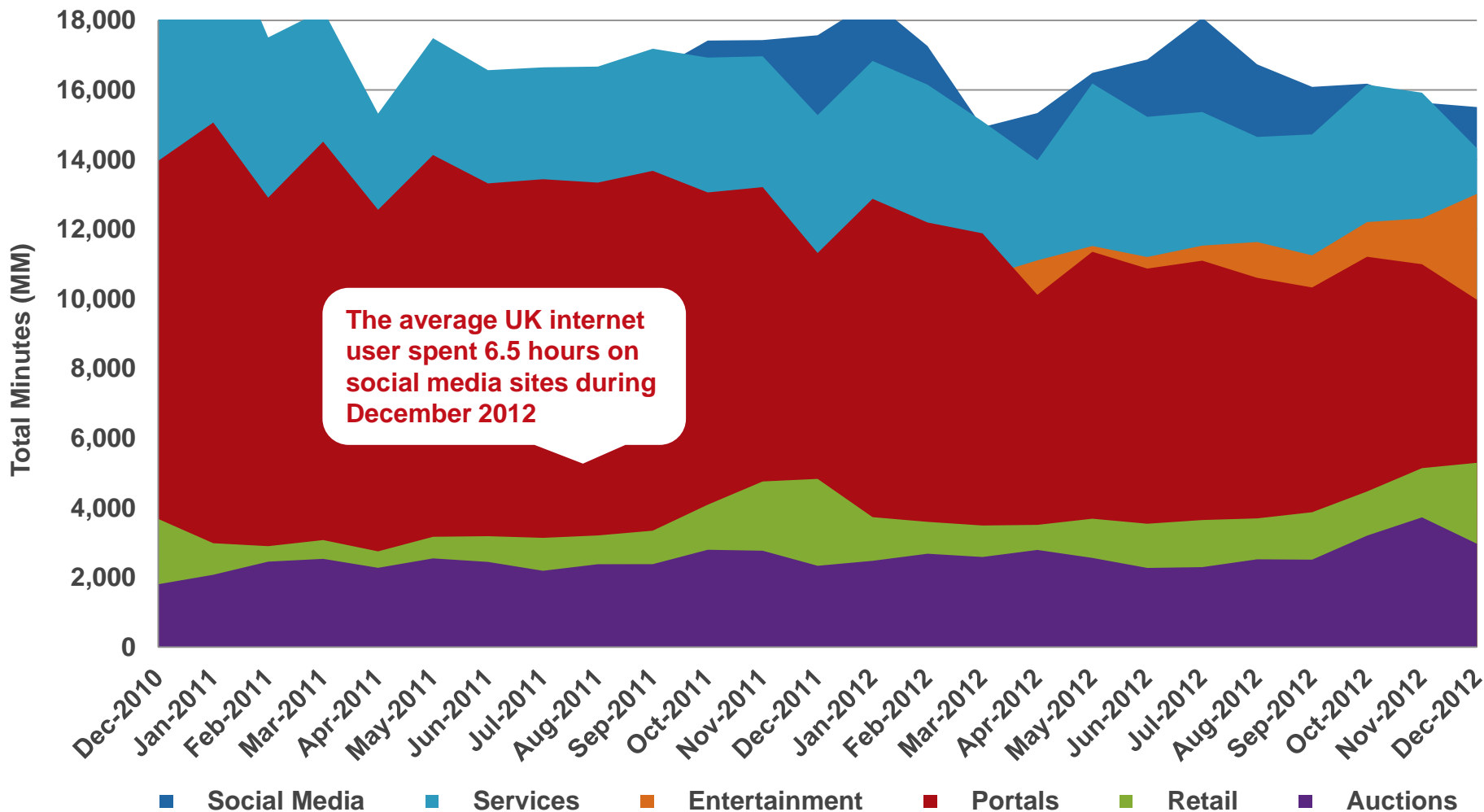
# The Digital Future In Focus

- **We've looked at breakdown of audience by:**
  - Device
  - Device by country
  - Daily Usage
  - Breakdown of the demographic
- **Let's now look at a breakdown of online behaviour...**

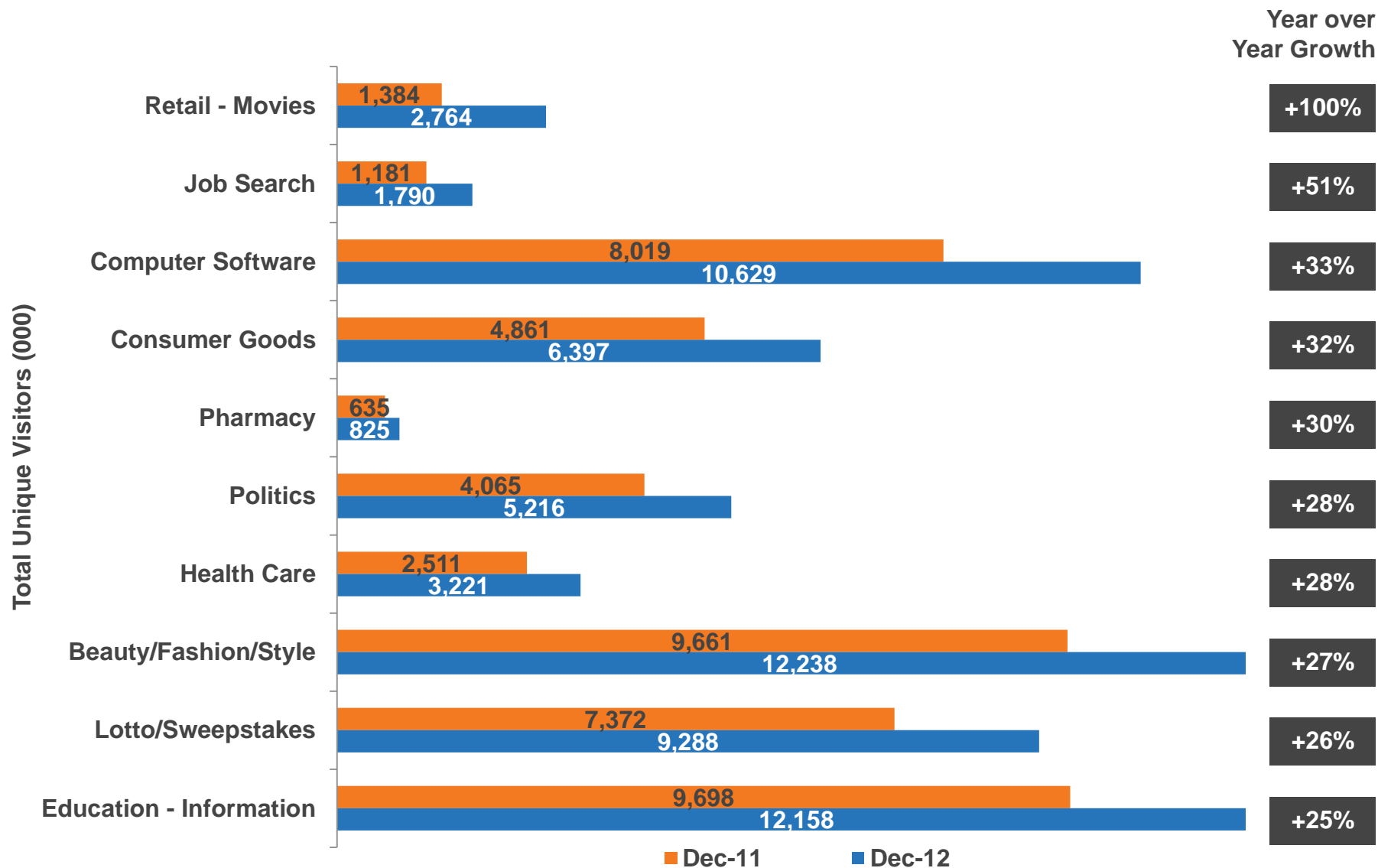


# Social Media Captures Most PC Screen Time in UK

Total Time Spent on Services (e.g. Email) Decreased – But Still Top 2 Spot



# Retail Movies is Fastest Growing Web Category



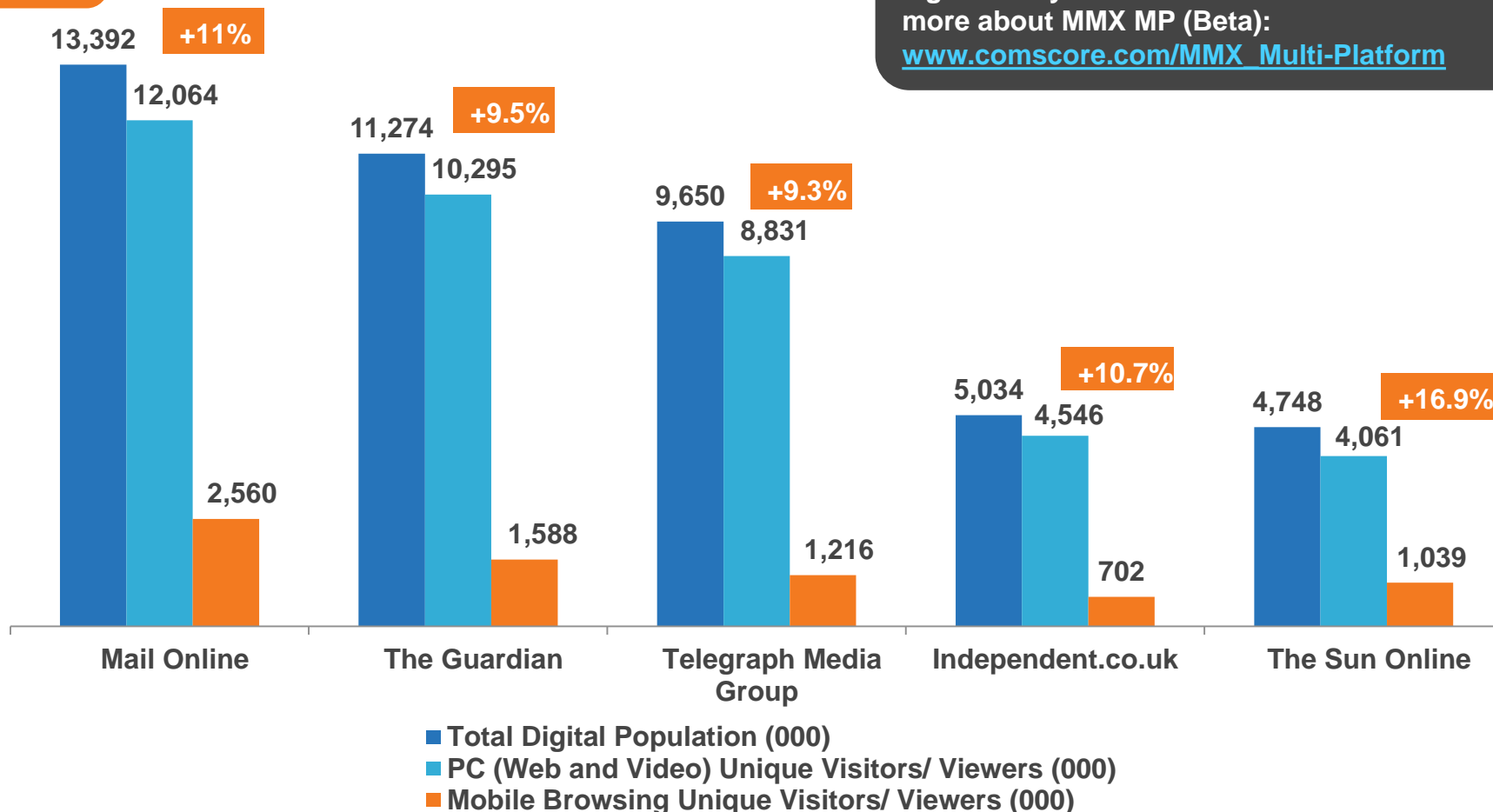
# Newspapers Extend Reach via Video and Mobile

## The Sun Extends Reach by Nearly 17% when Accounting for Mobile

Incremental Audience (%) via Mobile

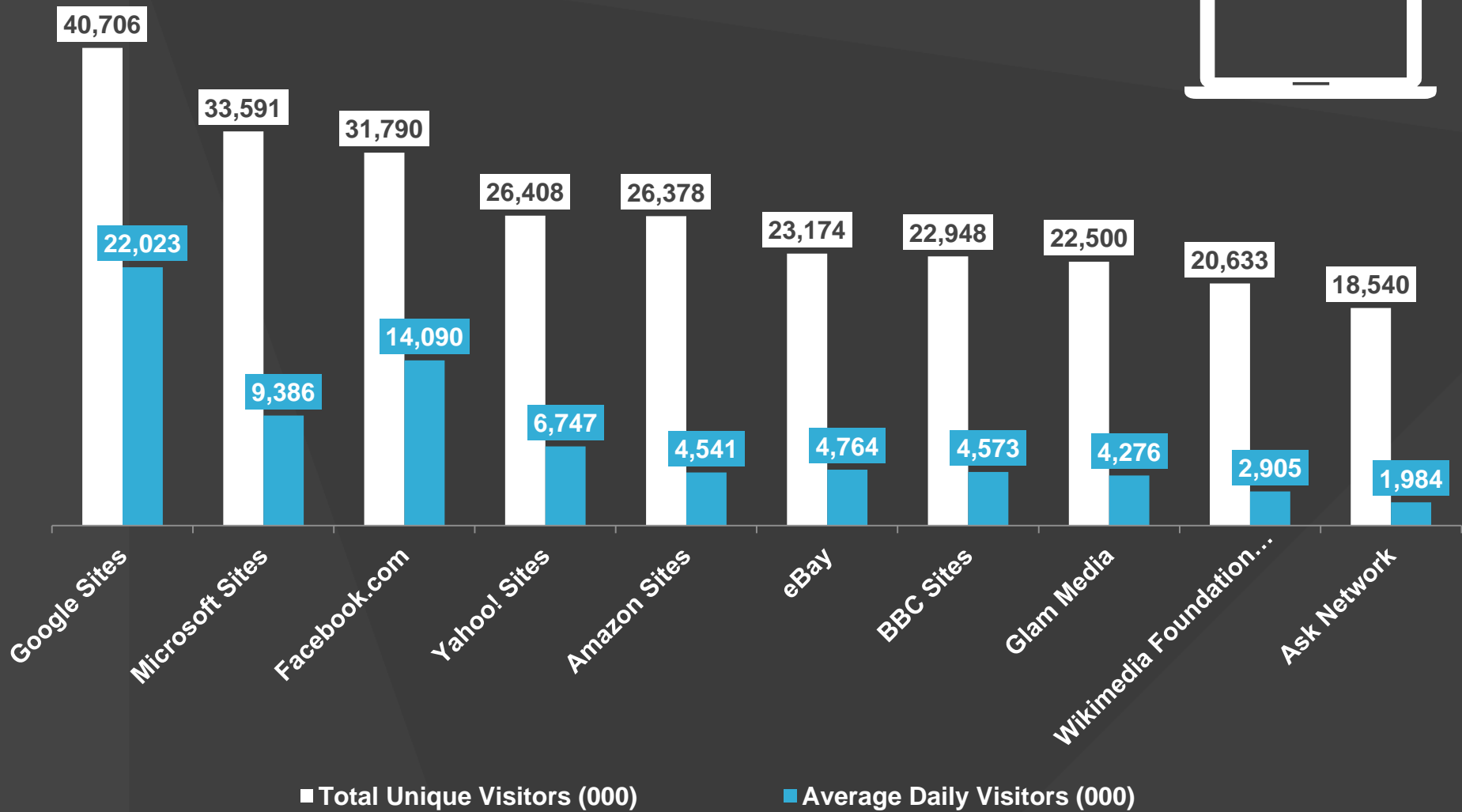
Accounting for these incremental audiences, media companies are able to demonstrate significantly wider scale to advertisers. Learn more about MMX MP (Beta):

[www.comscore.com/MMX Multi-Platform](http://www.comscore.com/MMX_Multi-Platform)



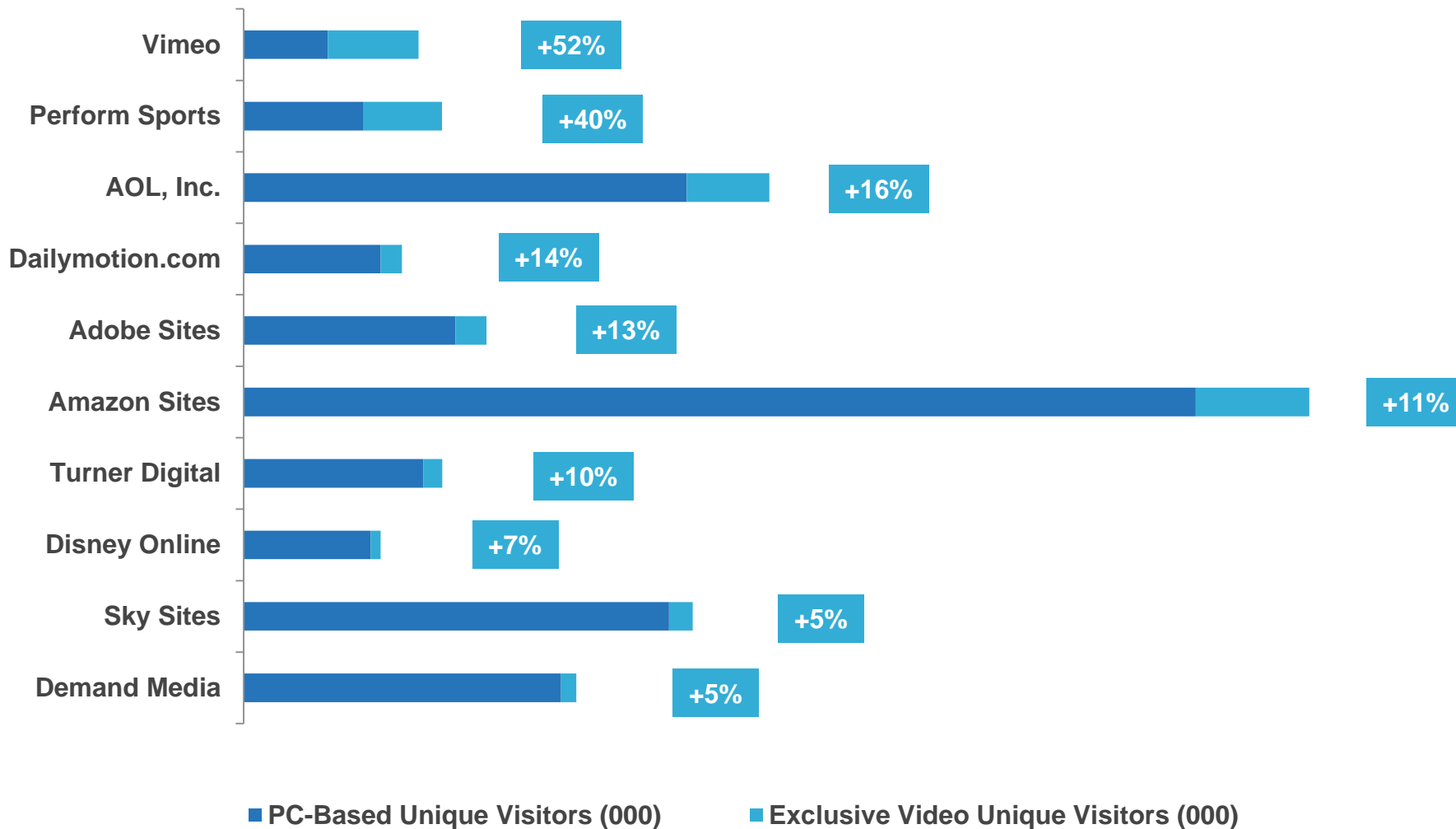


# Top Web Properties



# Online Video Enables Publishers to Reach Additional Audiences

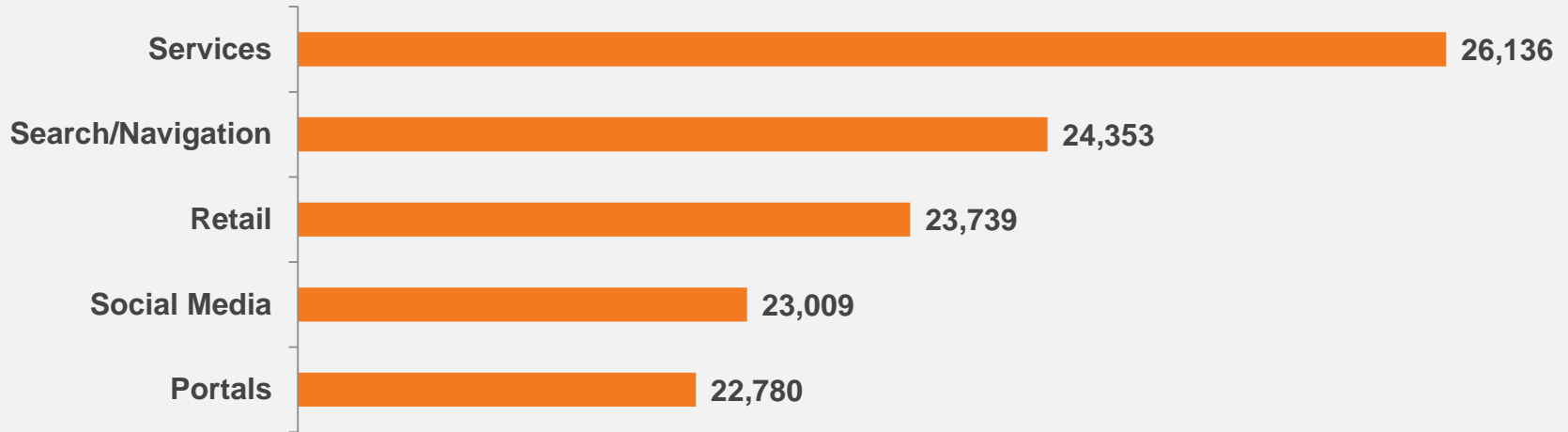
Sites with Highest Share of Video Viewers Compared to Total Digital Audience (Among Top 100)



# Top Mobile Categories (via Browser)



Total Unique Visitors (000)



Total Hours (MM)

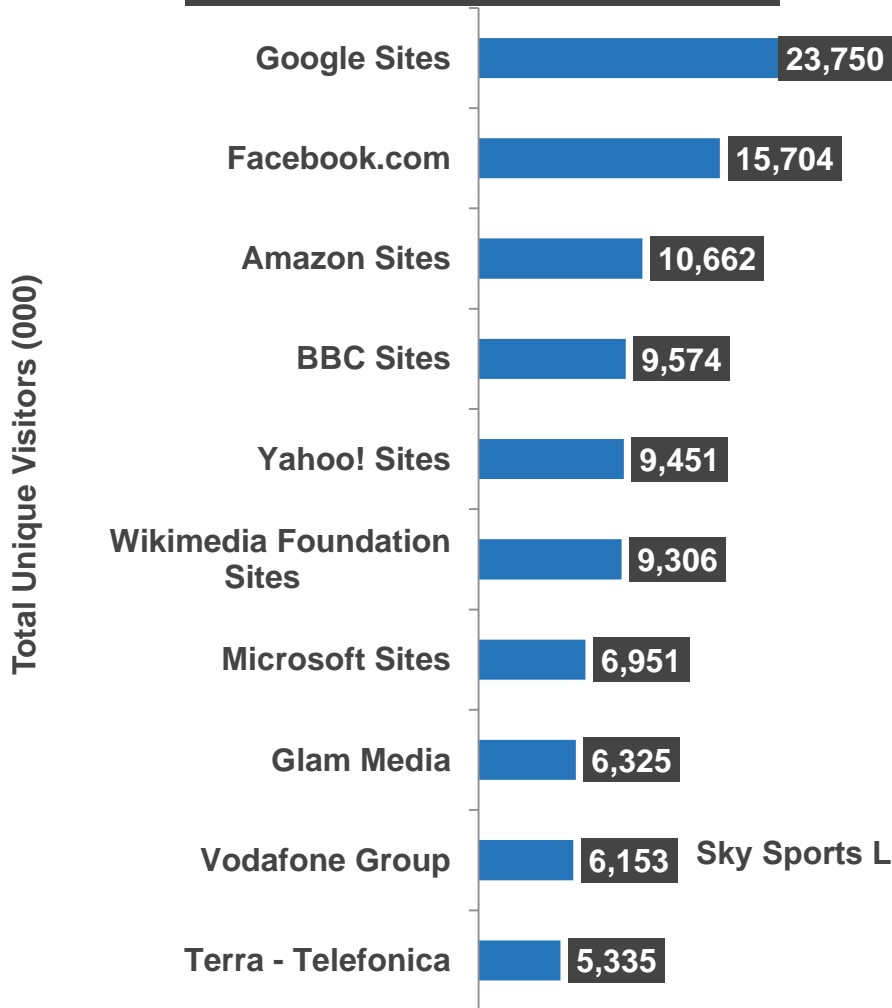


Average time spent accessing the internet via a mobile browser in the UK: 9.5 Hours per user a month

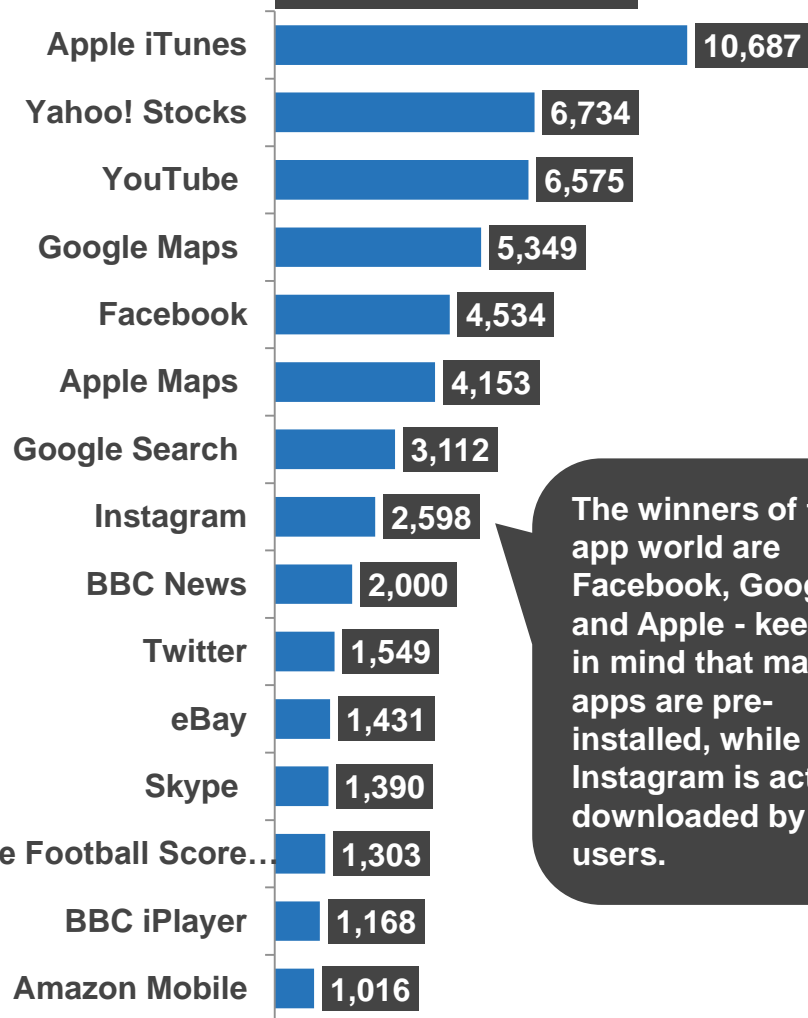
# Google Secures Spot as Top Mobile Website

## 3 Google Apps Make it into Top 10 – YouTube, Maps and Search

### Top 10 Mobile Websites



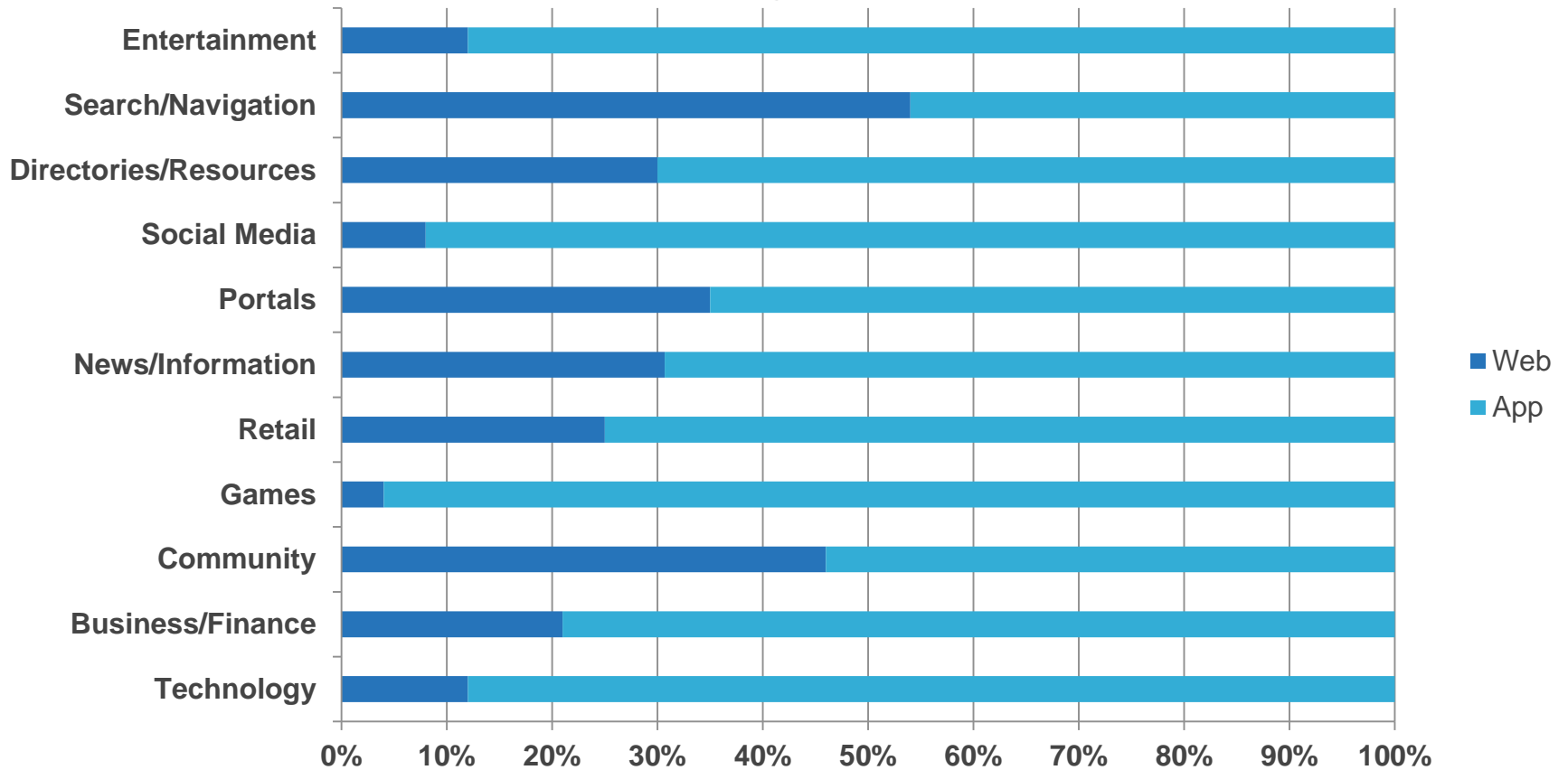
### Top 15 Apps



The winners of the app world are Facebook, Google and Apple - keeping in mind that many apps are pre-installed, while e.g. Instagram is actively downloaded by UK users.

# Apps Dominate Time Spent in Most Categories

Top Smartphone Categories by UVs,  
% Share of Time Spent by Access Method  
August 2012



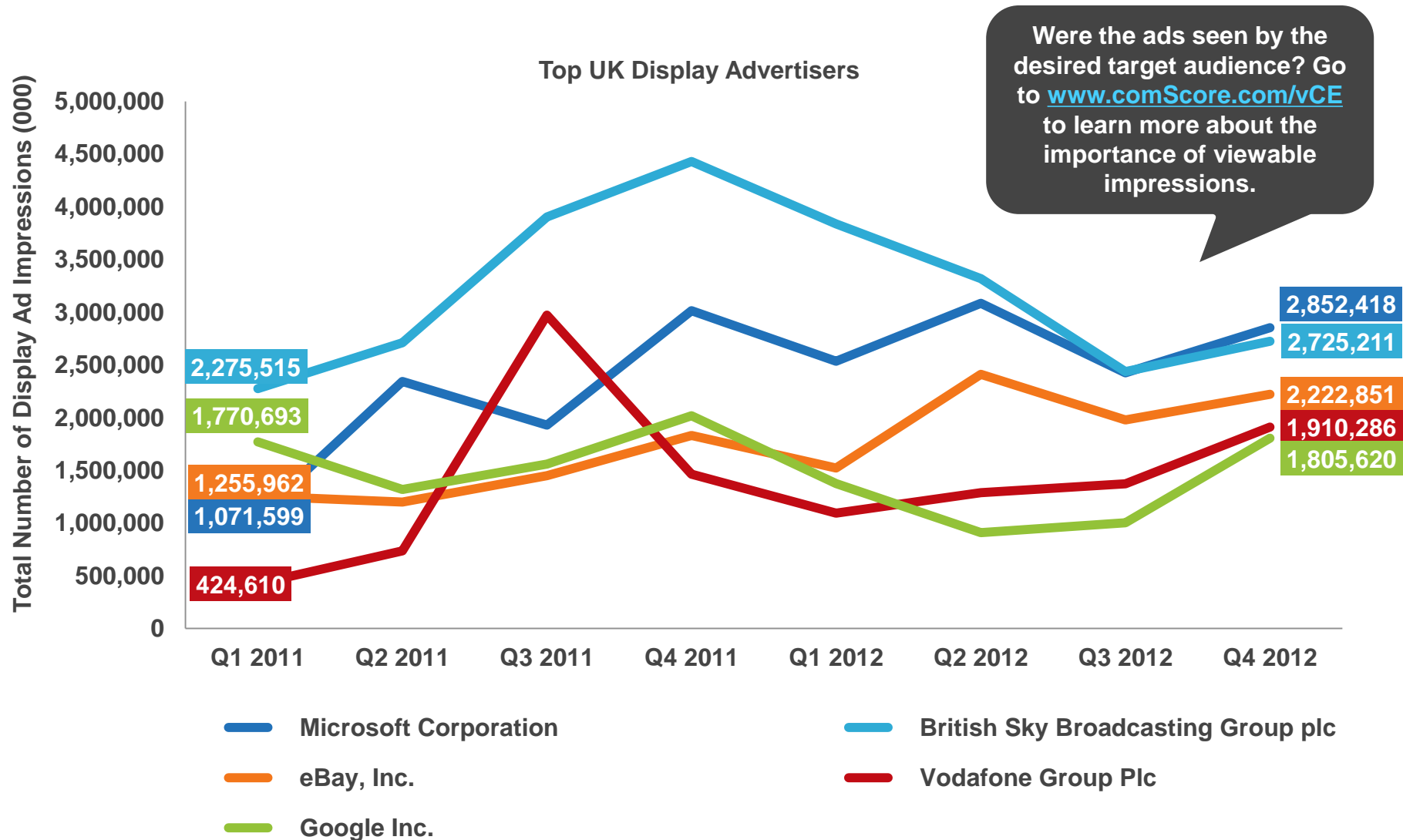
Source: comScore Mobile Metrix 2.0, US  
Data August 2012

# The Digital Future In Focus

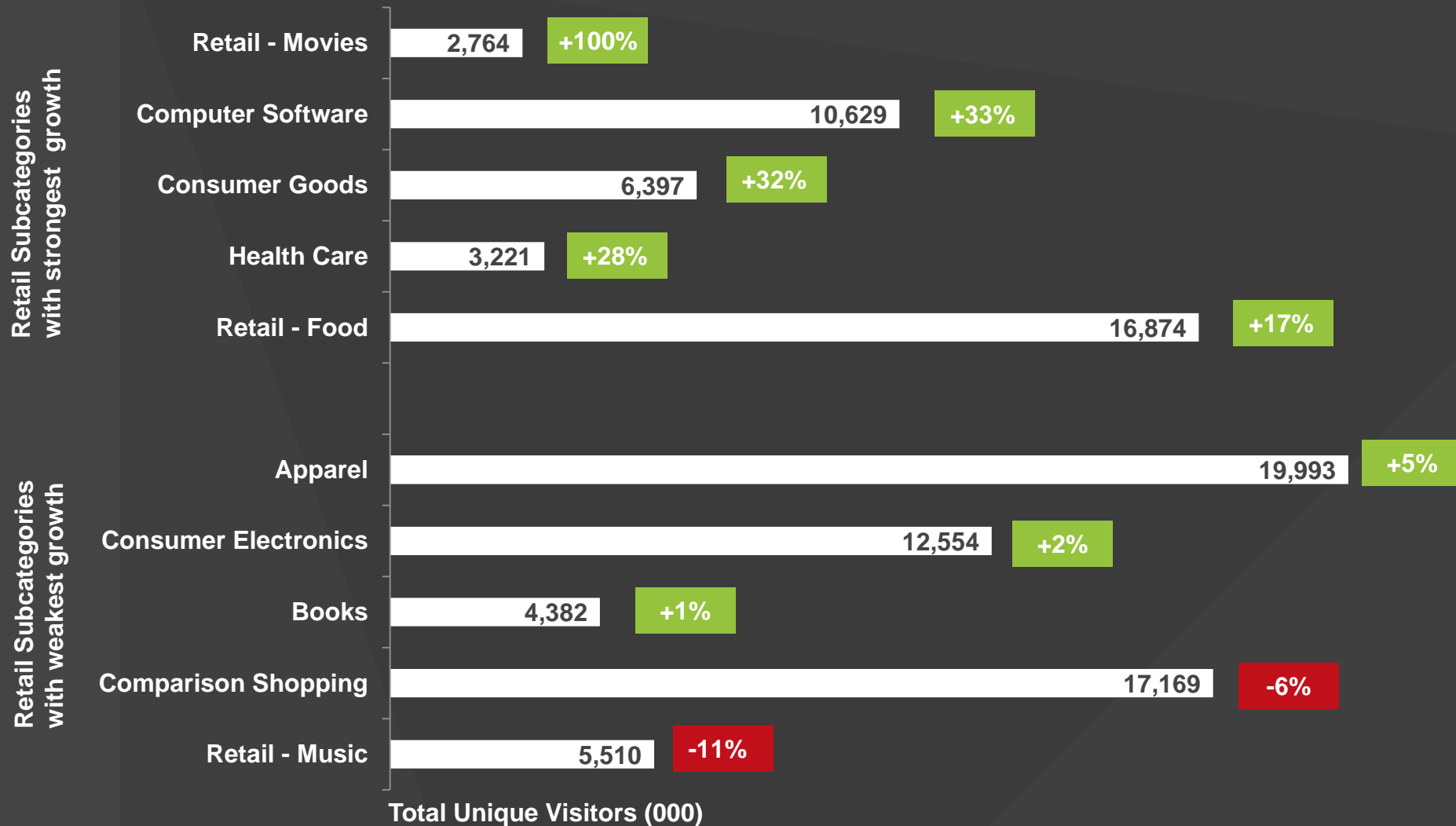
- **Now lets look at monetisation:**
  - How are publishers increasing add revenue
  - Using rich media to increase additional user
  - Capturing true ad impression is key to measuring success

# Top UK Display Advertisers

Over 923 Billion Display Ad Impressions Were Delivered in 2012

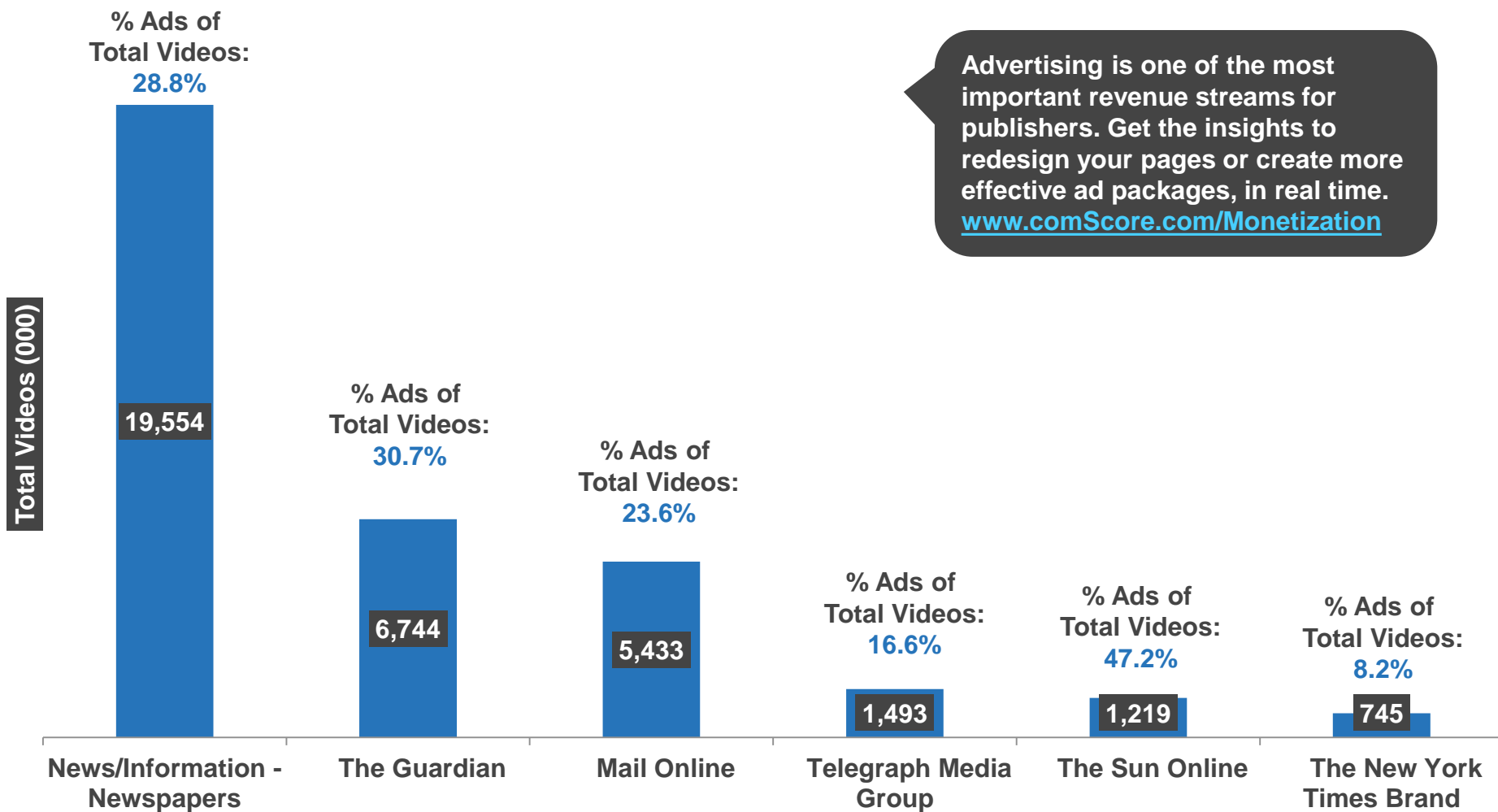


# Retail: Visitors to Movie Websites Double, Whilst Music Takes a Hit





# Newspapers: Monetising Video Content

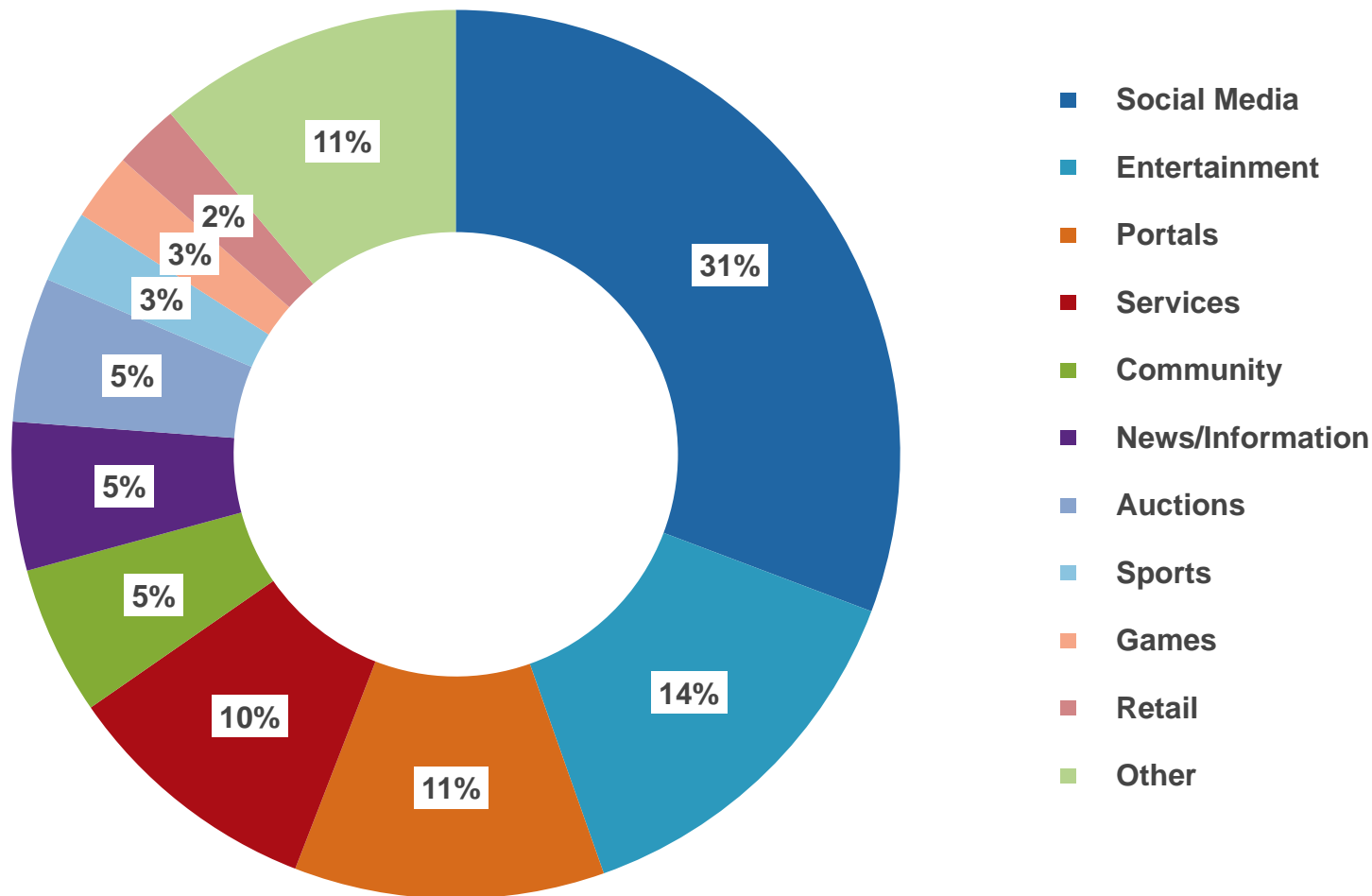


Advertising is one of the most important revenue streams for publishers. Get the insights to redesign your pages or create more effective ad packages, in real time.  
[www.comScore.com/Monetization](http://www.comScore.com/Monetization)

# UK Publishers Carrying Most Display Ad Impressions

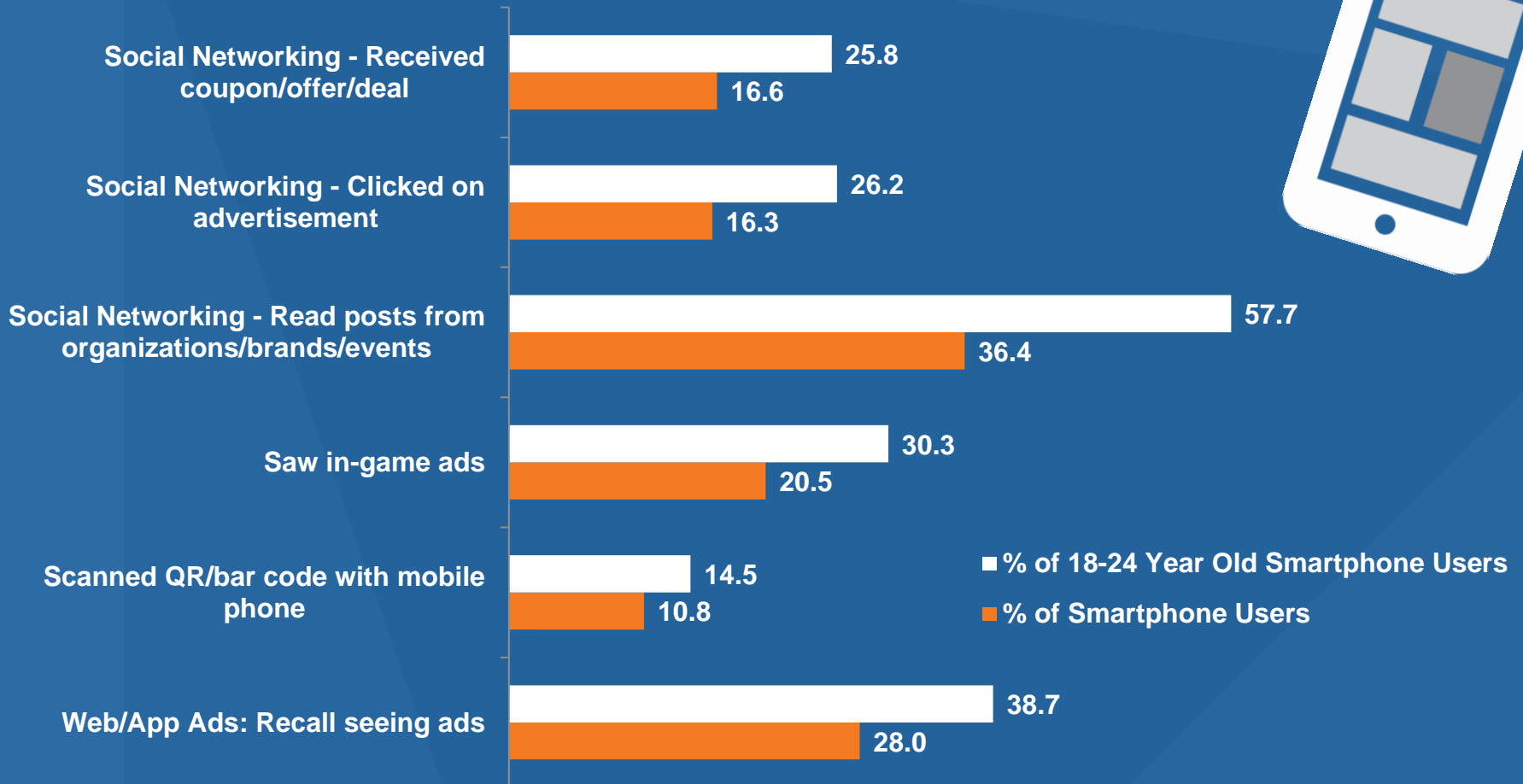
## Social Media Sites Capture Largest Share of Display Ads

Top Categories by % Share of Display Ad Impressions



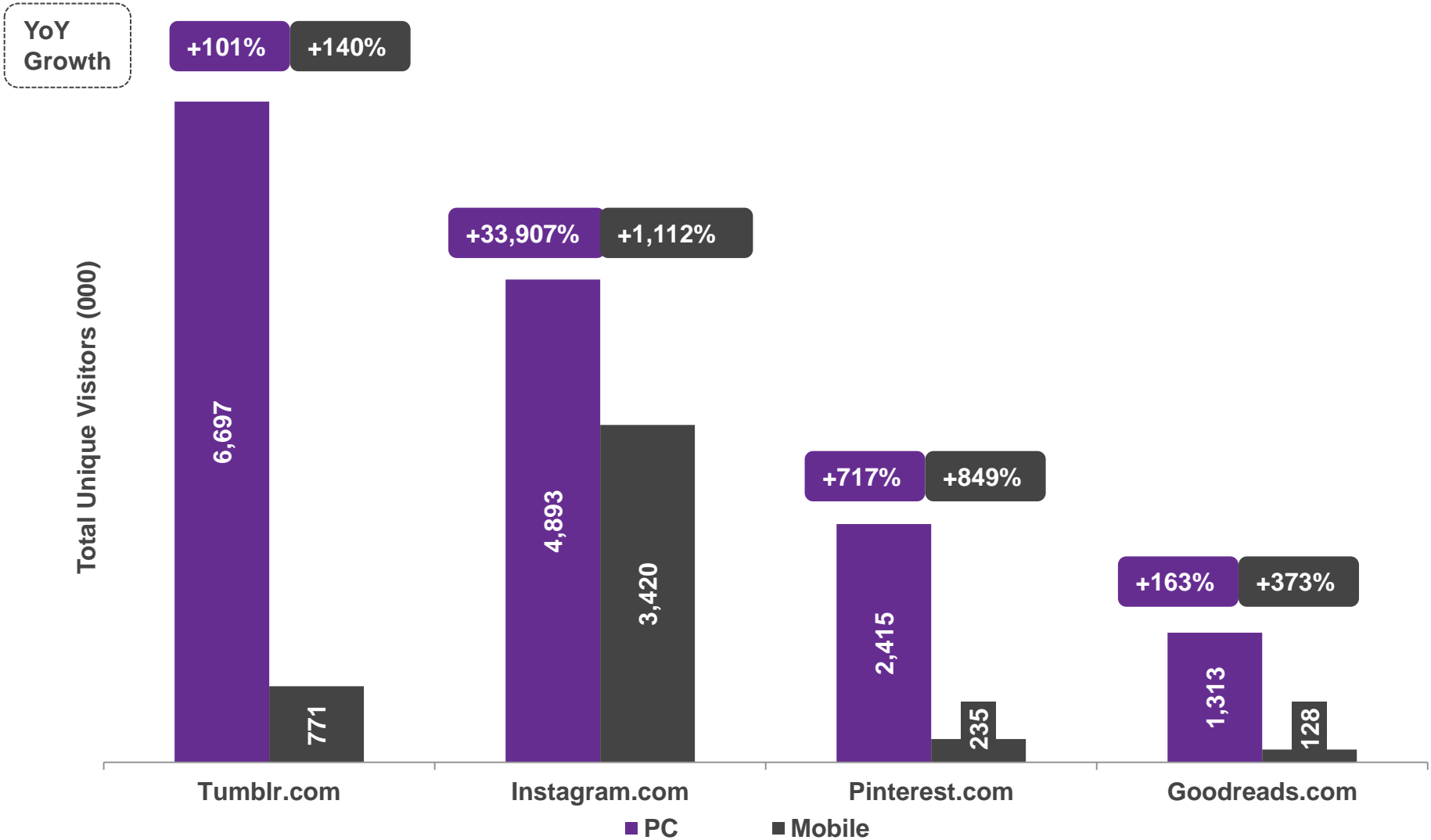
# Mobile Advertising – Multiple formats take hold

## Young Adults Have an Especially High Recall of Mobile Advertising



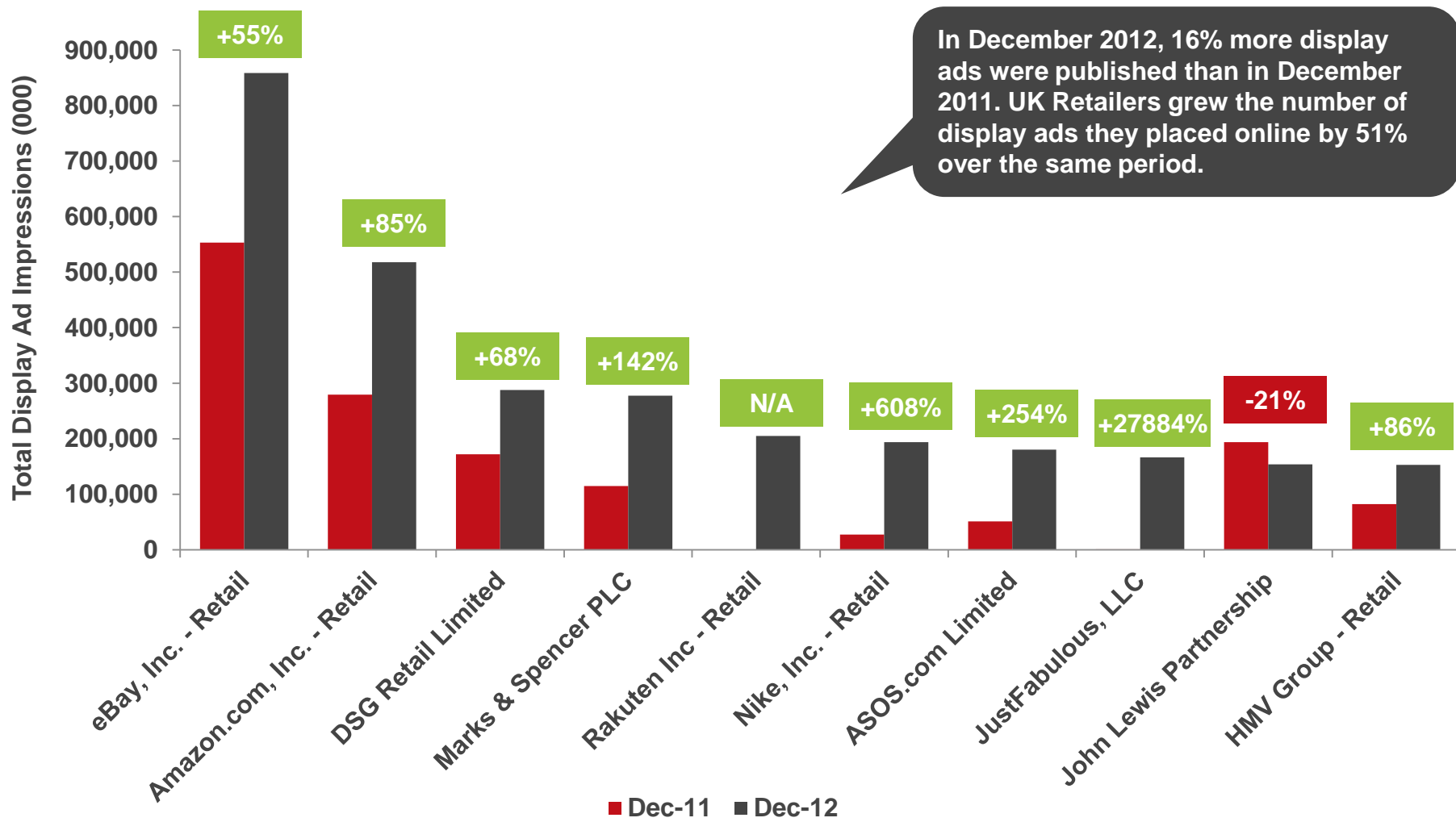
# Social – the New Kids on the Block

## Instagram UK Mobile Audience Grows by 1112% During Past Year



# UK Retailers Increase Number of Display Ads

eBay, Amazon and DSG Lead Ranking of UK Retail Advertisers



# Mobile Retail Trends

## 1. PURCHASING

20% of smartphone users purchased a good or service on their device. Price per item and overall monthly spend is growing rapidly.

## 2. SHOWROOMING

The smartphone, the perfect companion for comparing prices, finding shop locations etc. is with you at all stages of the purchase funnel.

## 3. SHARING

People use social media to share what they have purchased, check into a shop etc.

### Top 3 Retail Activities on a Mobile



**26%**  
Find  
Store Location



**20%**  
Compare  
Product prices



**19%**  
Research  
Product Features

# Conclusion

- **Knowing your audience is key!**
  - Customer journey
  - Platform
  - Demographic
  - Competition
  - Monetisation
- **Publishing is proving that adopting new media improves visitation and ad impressions**
- **Social is continuing to grow users and ad spend**
- **Rising stars – Instagram and Pinterest**

# Challenges

- **How many of your ad impressions are being seen by customers?**
  - How do you prove it?
  - How do you monitor?
- **Is search (SEO) worth the investment and how accurate is it?**
- **How are you going to measure and assess your customer journey and look at propositions that will support and address these requirements?**



# Thank you!

For further information, please contact:  
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