

A hand holding a smartphone is the central focus, set against a background of a blurred office environment. Overlaid on the image are various digital graphics: a grid pattern, a globe, several envelope icons, and a network of white dots connected by thin lines. A large, semi-transparent white banner is positioned across the upper middle of the image, containing the main title. Below the banner, a blue wavy graphic element curves across the bottom of the page.

Global Digital Future in Focus

2018 International Edition

Introduction

This report provides a snapshot of the global digital landscape, using audience sizes, demographics and behaviours across all digital platforms (desktop, smartphone and tablet) to identify universal trends and unique characteristics of international markets.

All data comes from the comScore audience measurement tools referenced across the page.

For more information on this report or comScore products, contact: worldpress@comscore.com

comScore products

MMX Multi-Platform offers comprehensive reporting on more than 300,000 digital media entities, including their un-duplicated audience size, demographic composition, engagement, performance within key user segments and behavioural trends. All of these metrics can be compared across digital media platforms and can be used to understand incremental activity coming from each platform.

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.

MobiLens® Plus matches quantitative observed behaviours with self-reported survey responses, connecting data about consumers' mobile content consumption with purchase-intents, interests and device satisfaction.

Video Metrix provides objective insights with the most accurate and comprehensive measurement of global online video activity.

The State of Global Digital

A look at 13 global digital markets, examining key audience and consumption indicators across desktop, smartphone and tablet devices

72%

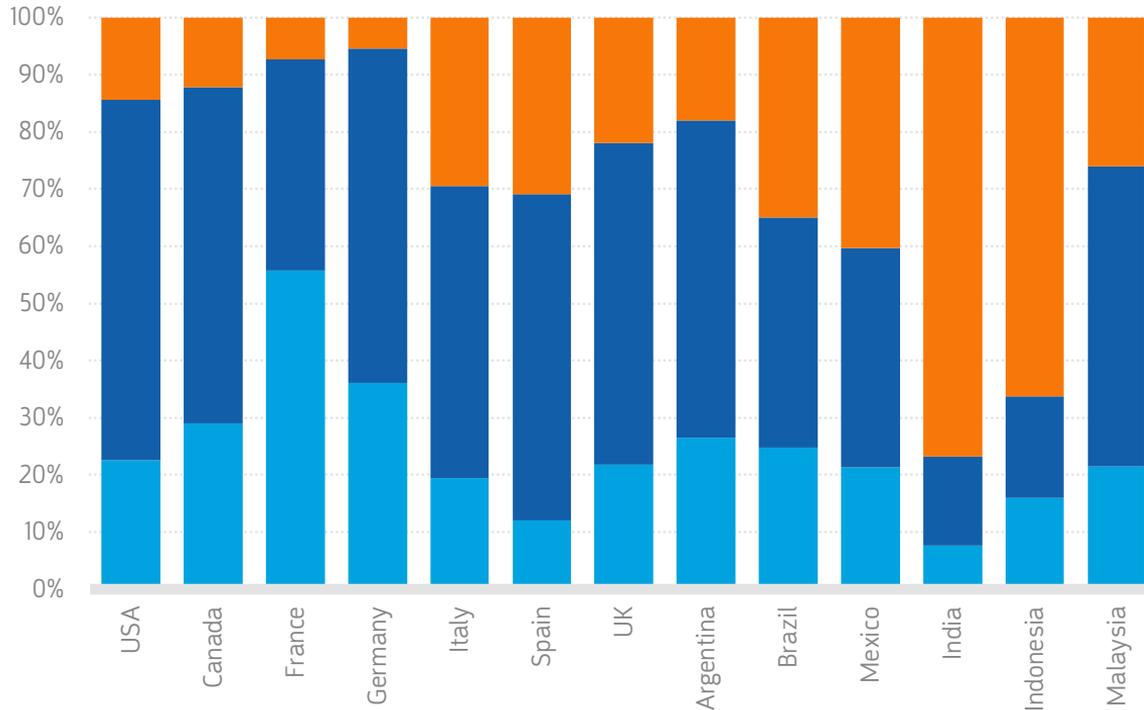
54%

96%

82%

Multi-platformers remain a majority in most markets

% of Total Digital Audience by Platform (Desktop only, Multi-platform, Mobile only)

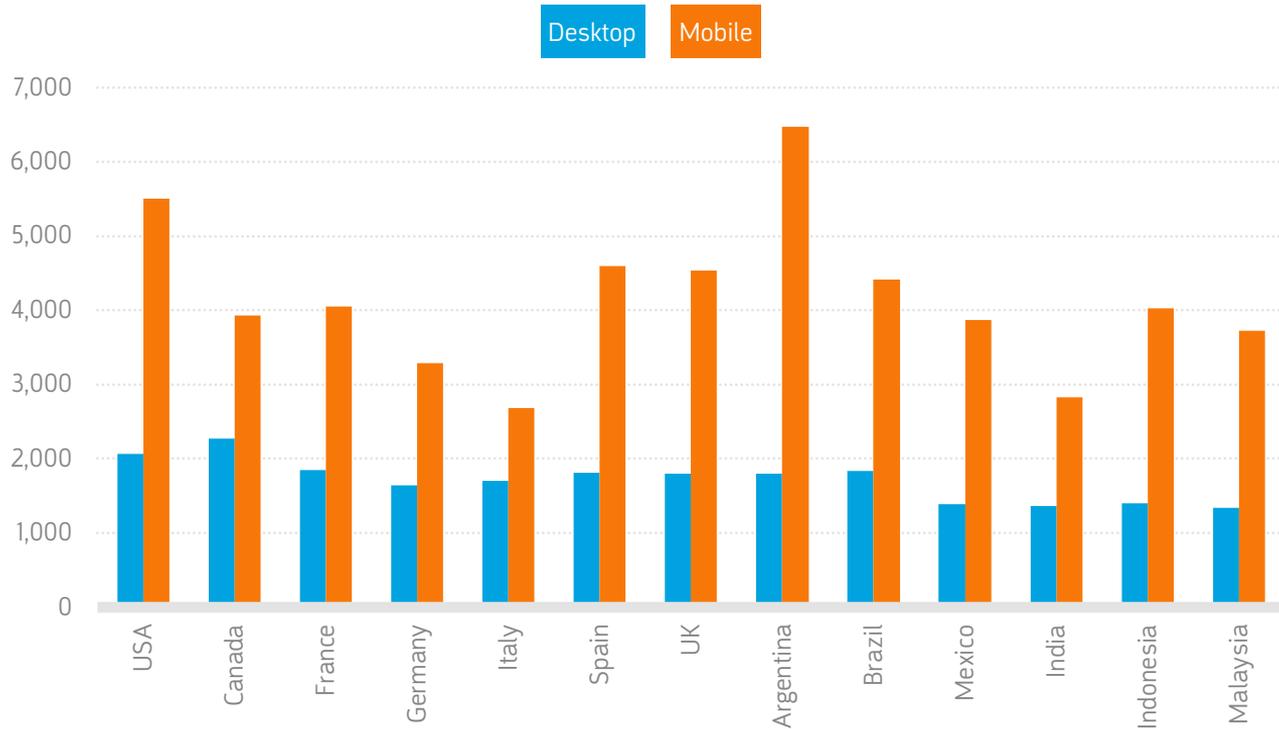


Multi-platform users (those who access online content via desktop and smartphone / tablet in a month) remain the majority overall, with an average across markets of 46% of the total population.

Mobile only usage now averages just above desktop only consumption with a cross-market average of 30%, driven heavily by large share in APAC markets, versus 24% for desktop only.

Mobile users consume more than 2x minutes vs. desktop users

Average Minutes per User by Platform

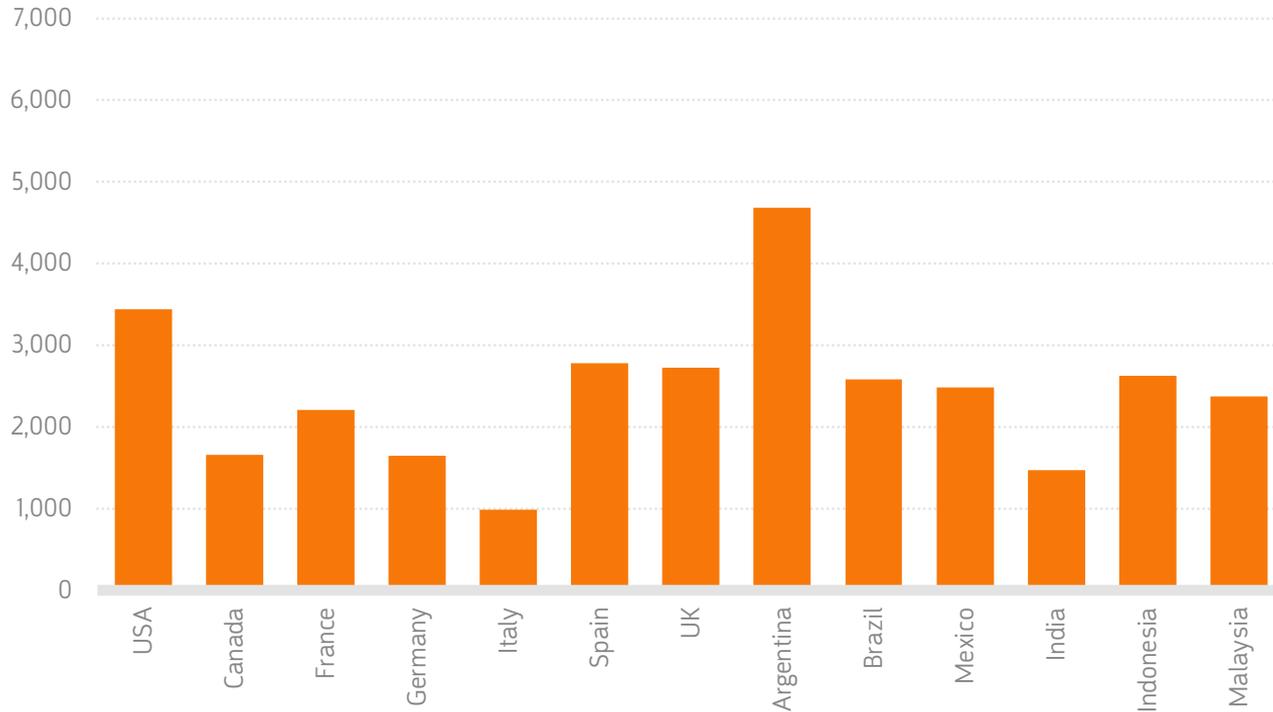


When looking at each region's desktop users and mobile users separately, mobile users universally consume more digital minutes per person – more than double in the majority of countries.

Argentina continues to deliver the largest number of mobile minutes per user, while Canada has the highest level of per-user desktop consumption.

Argentina has largest disparity between platform average minutes

Difference in Average Mobile vs. Average Desktop Mins Per User

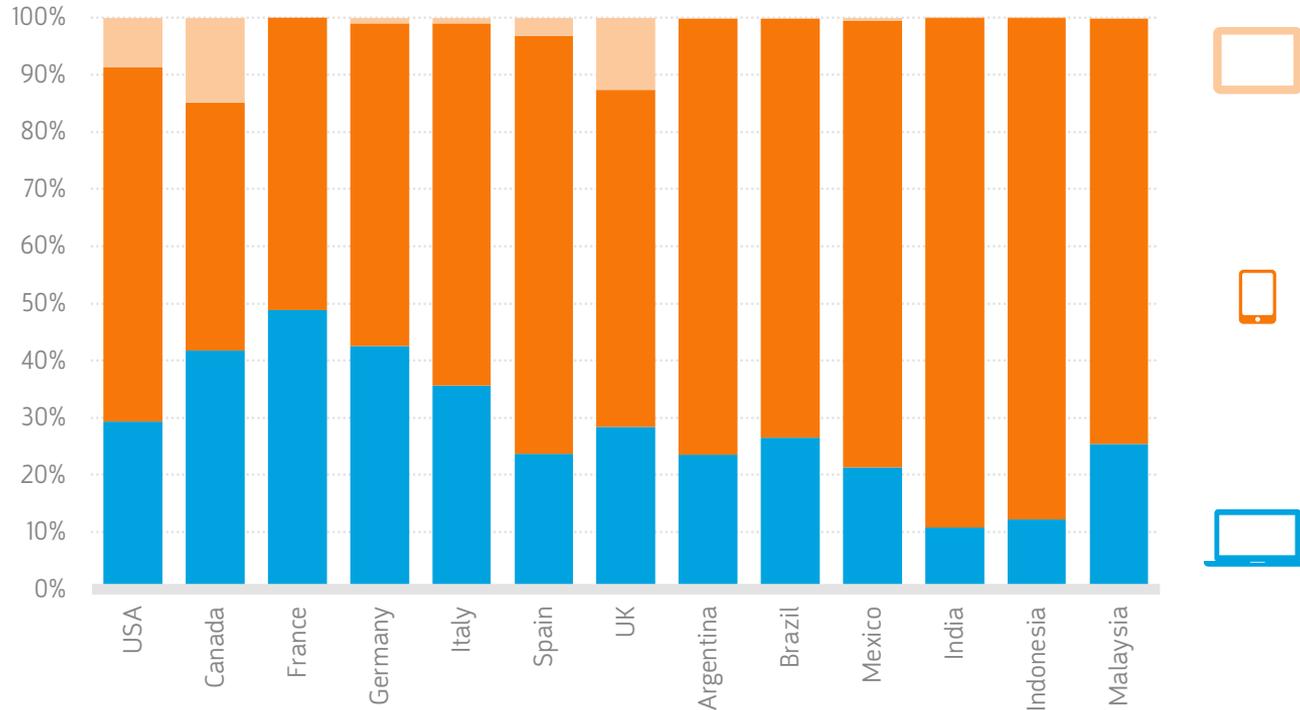


As well as the greatest number of per user mobile minutes, Argentina also has the largest disparity between the two averages.

Surprisingly, the US has the second-largest difference, even with the presence of an established desktop foundation that is less prevalent in other markets, which are often considered to have largely avoided the “desktop phase”.

Smartphone takes largest share of global digital minutes

Share of Total Digital Minutes by Platform (Desktop / Smartphone / Tablet)

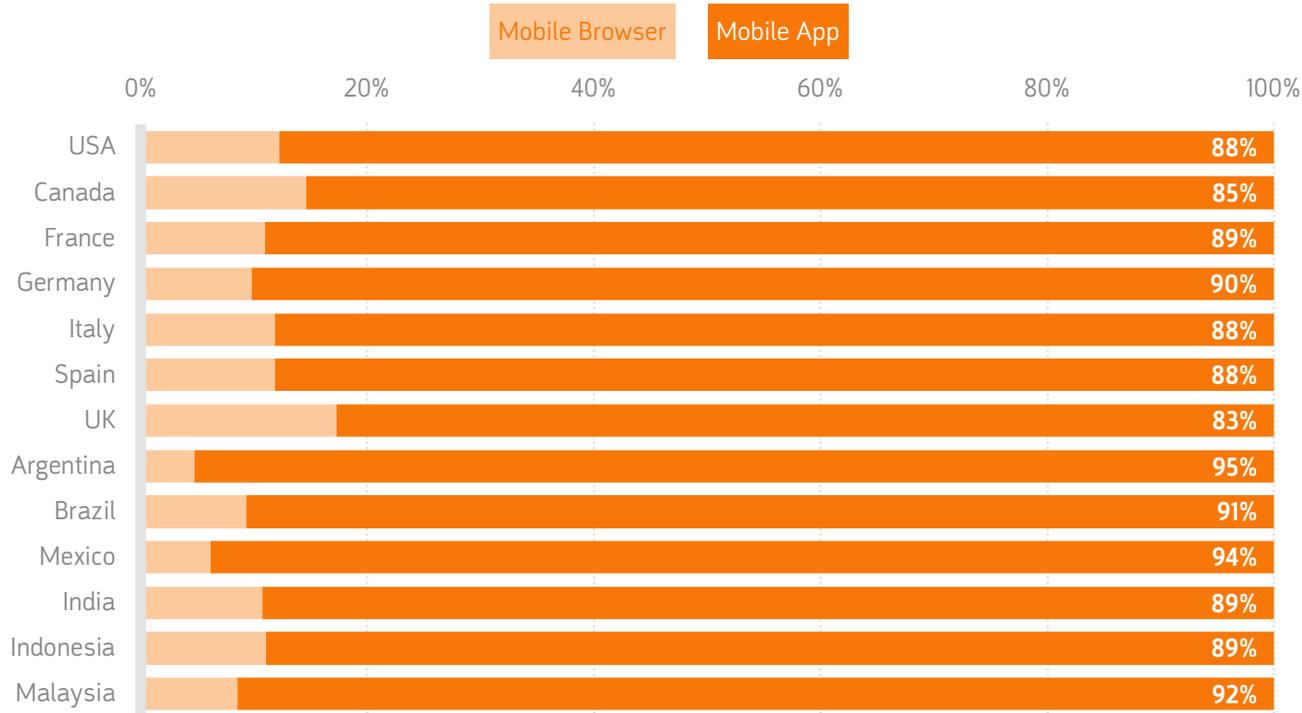


Smartphone is now the dominant platform in terms of total minutes across every market.

This is most pronounced in India (89% of total minutes), and least noticeable in Canada where, thanks additionally to the largest share of tablet minutes (15%) seen in any of the markets shown, smartphone represents 43% of time, to desktop's 42%.

Apps Account for Over 80% of Mobile Time

Share of Total Mobile Minutes by Browser / App



When considering mobile (smartphone and tablet) minutes in isolation, they are overwhelmingly dominated by app consumption – over 80% of all mobile time in the markets considered for this report.

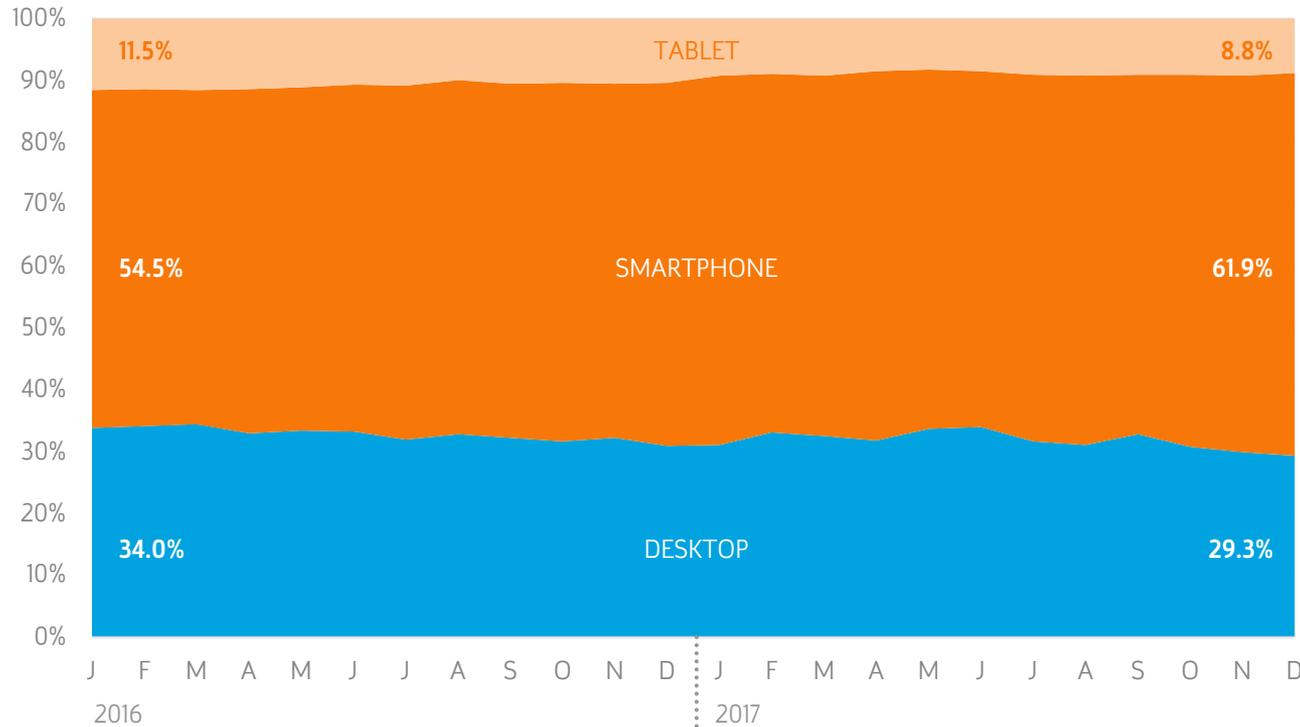
Levels appear marginally higher in Latin America, with Argentina, Brazil and Mexico all falling within the top 5 of the markets shown here.

What changed in 2017?

How did adoption and usage of platforms, categories and apps change over the course of 2017, and what might this mean for digital markets in 2018?

Platforms' market share continued to evolve

Share of Total Digital Minutes by Platform (US)



We showed earlier in this report that smartphone is the primary platform in all markets, but it is also worth noting that even in mature markets such as the US, this platform continues to squeeze share away from desktop and tablet.

As we'll see on the next slide, the past year has seen this effect to a different degree between markets.

Smartphone share did not show a universally positive trend

Smartphone Share of Total Digital Mins (Dec. 2016 vs. Dec. 2017)

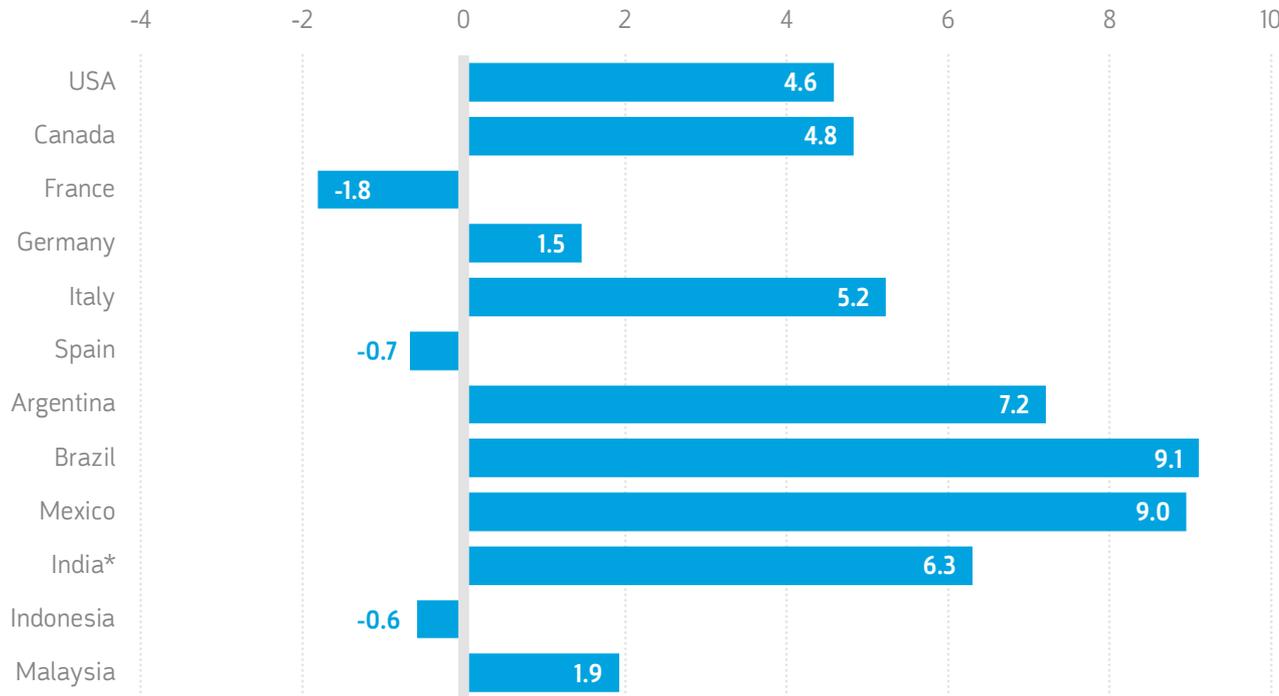


It is worth noting that the pattern exhibited by the US on the previous slide is not common to all markets.

Indeed, of the 8 markets for which comparable 2016 data is available, Smartphone share decreased in half of them. This fact should not be taken in isolation however, as it does not imply that smartphone minutes decreased (rather that overall time grew, and faster on other platforms).

Size of 'mobile only' audience grew almost universally

Percentage Points Change in Reach of 'Mobile Only' Audience (Dec. 2016 – Dec. 2017)



'Mobile only' audiences are now second only to 'multi-platform' users in the majority of markets, and appear to be increasing their reach among the overall population in many markets.

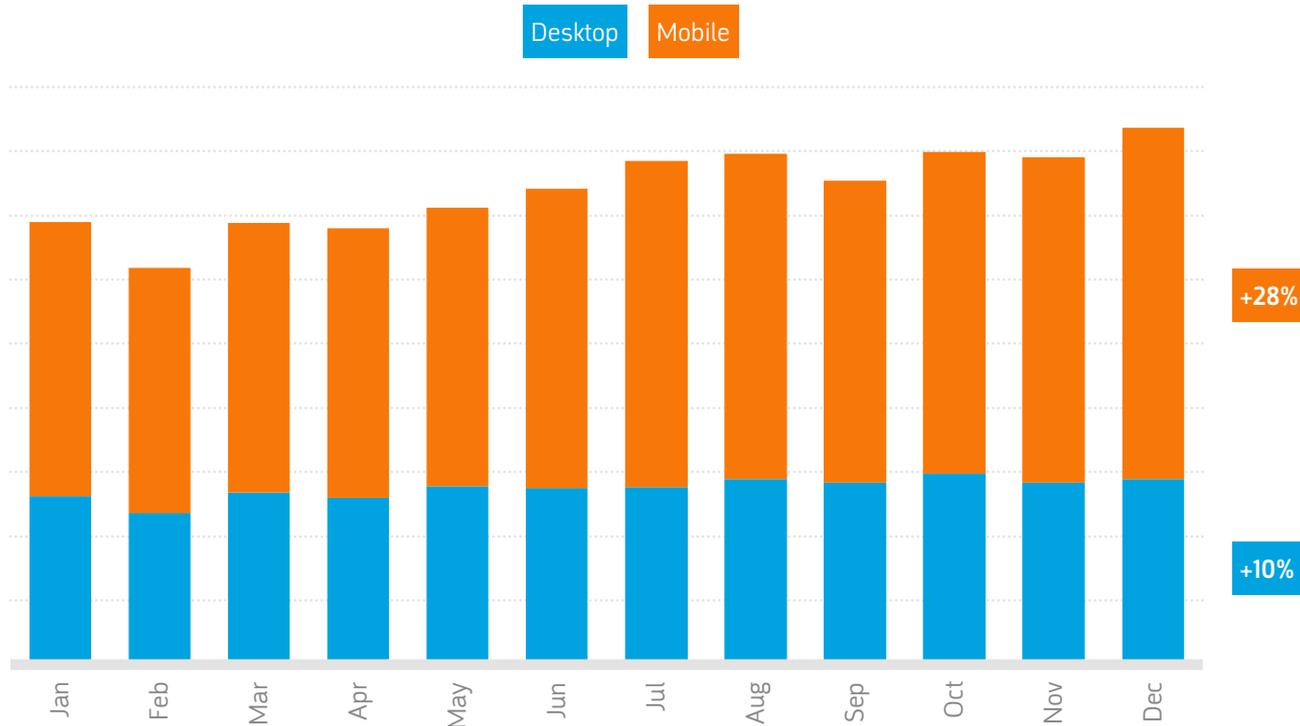
Even a relatively short period of 12 months has seen dramatic points change in the percentage of users who no longer feature desktop in their roster of digital devices over the course of a month.

*India data only available from Feb 2017. Comparison for India is Feb 2017 vs. Dec 2017

Source: comScore MMX Multi-Platform, Dec 2017

Video growth was led by, but not exclusive to, mobile devices

Total Video Minutes for Top 100 Video Properties (US)



Data from the US gives an indication of the growth of online video across all digital platforms, but most notably on mobile, which grew 3x as quickly as desktop over the past 12 months.

Video content providers and advertisers will be encouraged by growth on all platforms, but will be reminded that overlaps between these platforms have significant impact on net reach and frequency.

Snapchat breaks into the top 5 apps in two major markets

Top 5 Apps by Reach

USA	Canada	France	Germany	Italy	Spain	UK
Facebook	Facebook	Google Play	Google Play	WhatsApp	WhatsApp	YouTube
YouTube	FB Messenger	Google Search	WhatsApp	Google Play	YouTube	Facebook
Google Search	YouTube	YouTube	Google Search	Google Search	Google Play	Google Search
FB Messenger	Google Search	FB Messenger	YouTube	YouTube	Google Search	FB Messenger
Snapchat	Google Maps	Gmail	Facebook	Facebook	Google Maps	Snapchat

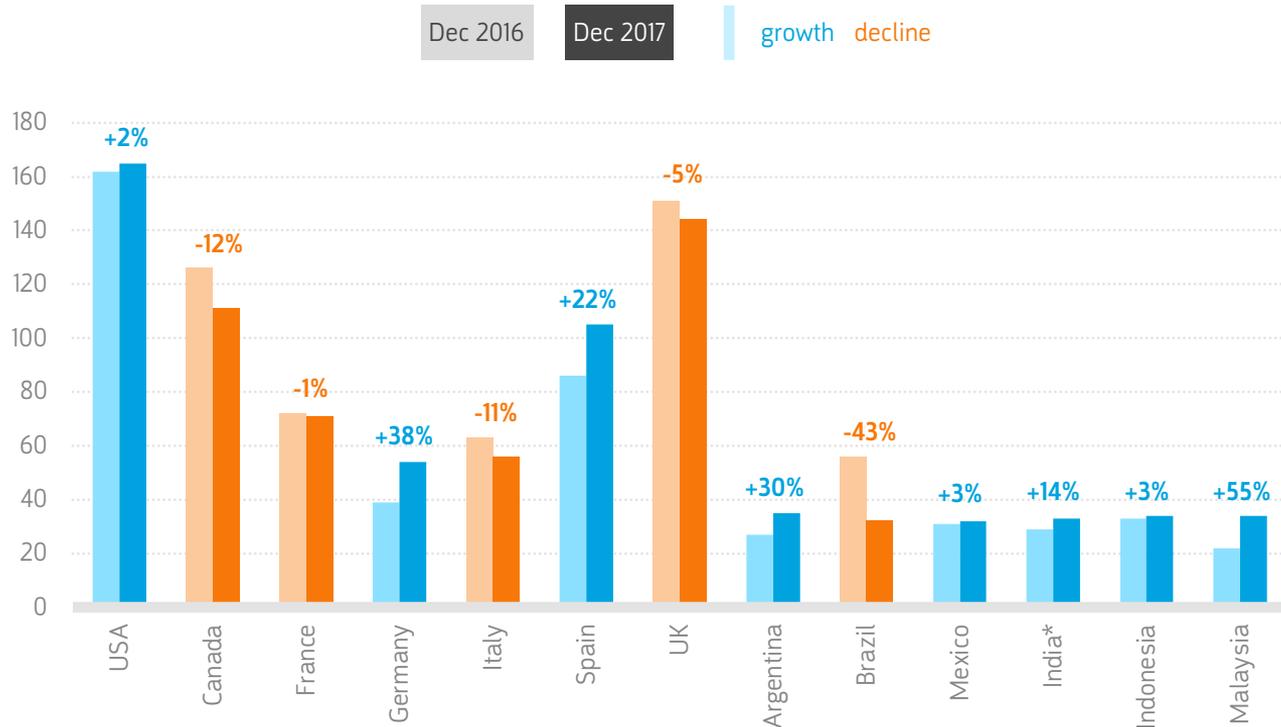
Argentina	Brazil	Mexico	India	Indonesia	Malaysia
WhatsApp	WhatsApp	WhatsApp	WhatsApp	Google Play	WhatsApp
Google Play	Google Play	YouTube	Google Play	WhatsApp	Google Play
YouTube	YouTube	Google Play	YouTube	YouTube	YouTube
Google Search	Google Search	Google Search	Gmail	Google Search	Google Search
Google Calendar	Gmail	Facebook	Google Search	Gmail	Facebook

Google and Facebook continue to enjoy dominance of top 5 app charts around the globe, but Snapchat is a notable new entry in the rankings for two of the largest digital economies.

It now ranks in 5th position by reach, up significantly versus the same point 12 months previously, when it was 9th in the US and 16th in the UK.

Number of sites / apps reaching 1 in 10 people (mostly) increased

Count of Entities with >10% Reach (Dec. 2016 vs. Dec. 2017)



The theme of digital consolidation has emerged recently, which many suggest will impact the mid-to-long tail.

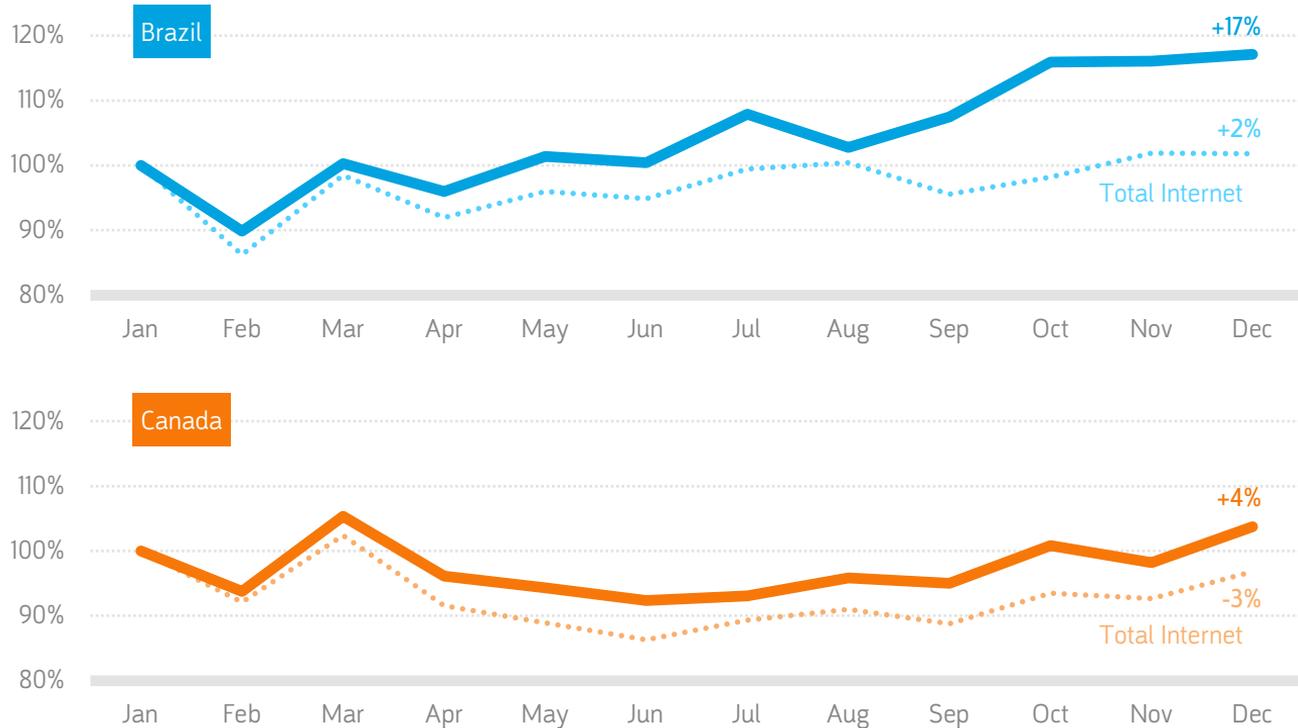
More than half of markets demonstrated a positive year-on-year change to the number of properties achieving more than 10% reach, and in the cases of the biggest declines (Brazil and Canada), we will see on the next slide that this does not necessarily indicate top-heaviness in that market.

*India data only available from Feb 2017. Comparison for India is Feb 2017 vs. Dec 2017

Source: comScore MMX Multi-Platform, Dec 2017

Encouraging growth for 'non-duopoly' properties

Total Minutes for Top 100 Properties (exc. Google Sites & Facebook) vs. Jan 2017

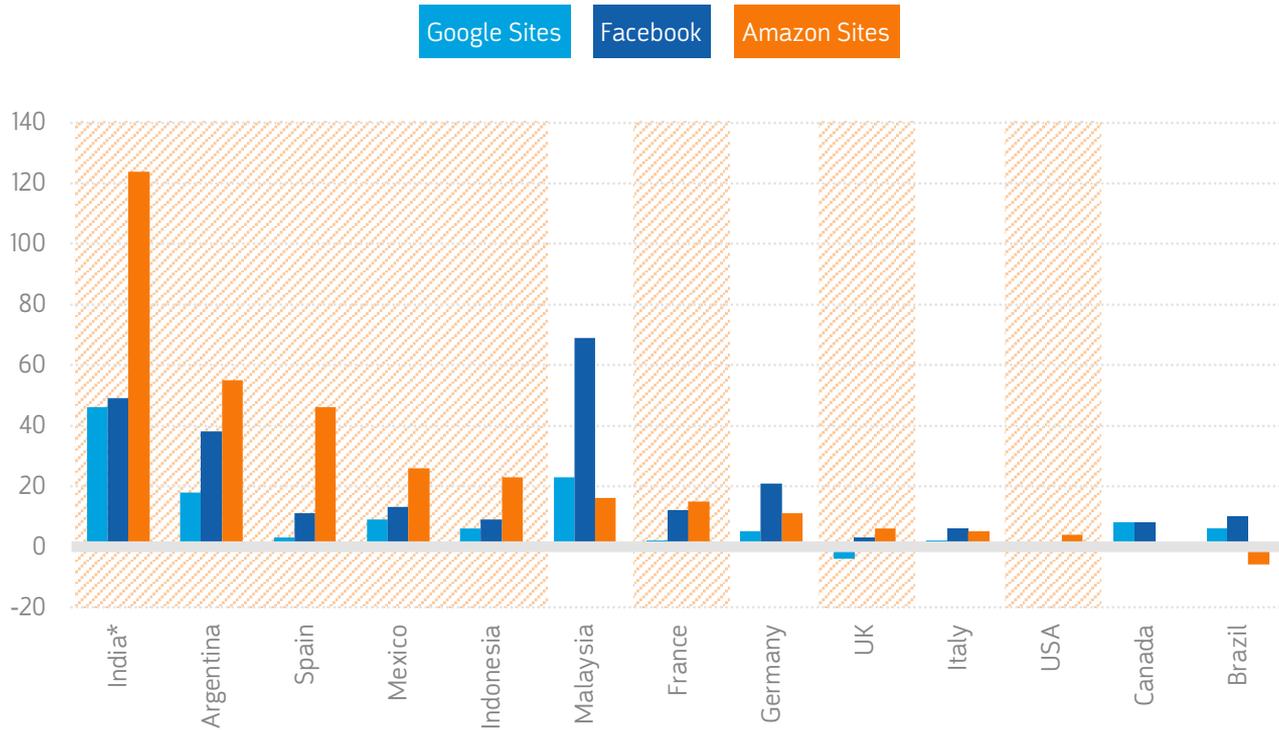


The previous slide showed two regions, Brazil and Canada, with considerably fewer entities achieving 10% reach than a year previously.

Another way of examining top-heaviness of a market is to compare the performance of the top 100 properties, excluding the duopoly of Facebook and Google. In both markets, these sites saw increases in consumption times ahead of the overall market.

As many predicted, Amazon gained significant ground

% Change in Total Digital Population (Dec. 2016 vs. Dec. 2017)



A final note on digital's much-cited duopoly – many predicted that Amazon would gain ground in 2017.

In 8 out of 13 markets, Amazon saw proportionally faster growth than both, although it must of course be noted that this was often from a lower base. Only one market (Brazil) saw a decline in Amazon's total digital population.

*India data only available from Feb 2017. Comparison for India is Feb 2017 vs. Dec 2017

Source: comScore MMX Multi-Platform, Dec 2017

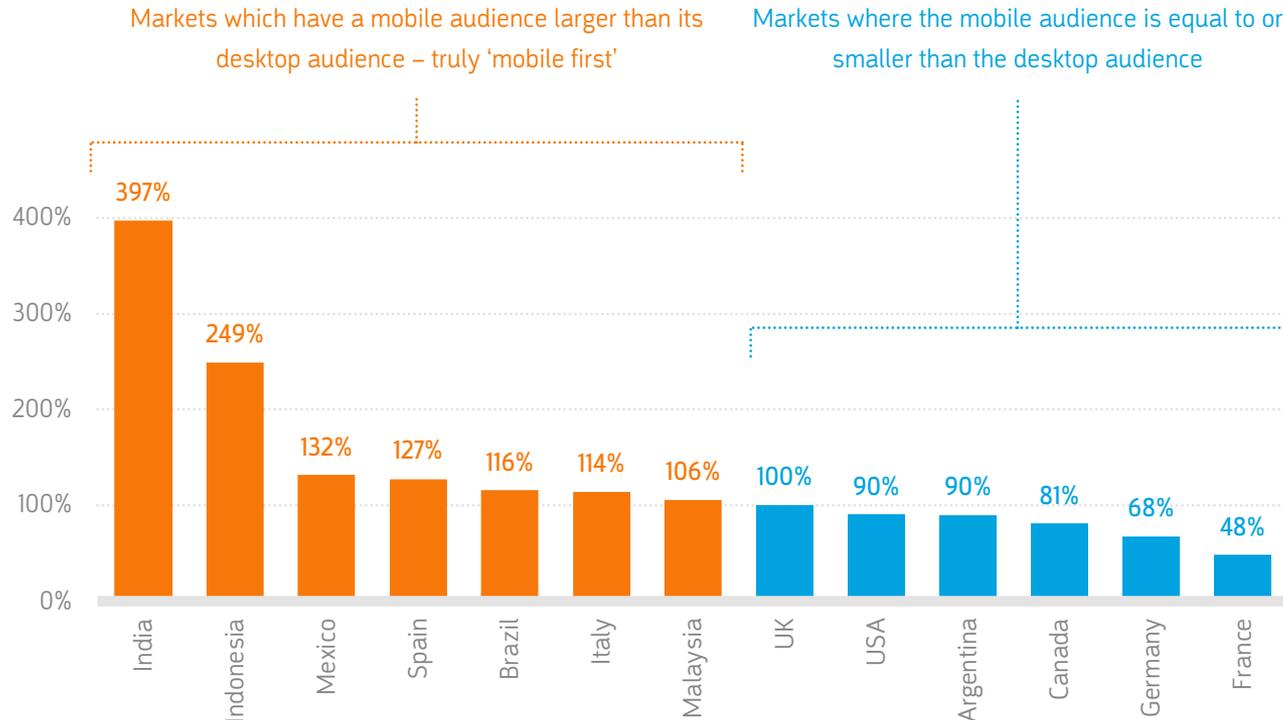
'Mobile First' Revisited

Digital time has shifted heavily to mobile platforms, but some markets retain desktop audiences that are equal or larger in size. Are there other ways in which we can define the concept of 'mobile first' markets, categories and brands?



Some desktop audiences remain equivalent or larger than mobile

Mobile Unique Visitors as a % of Desktop Unique Visitors

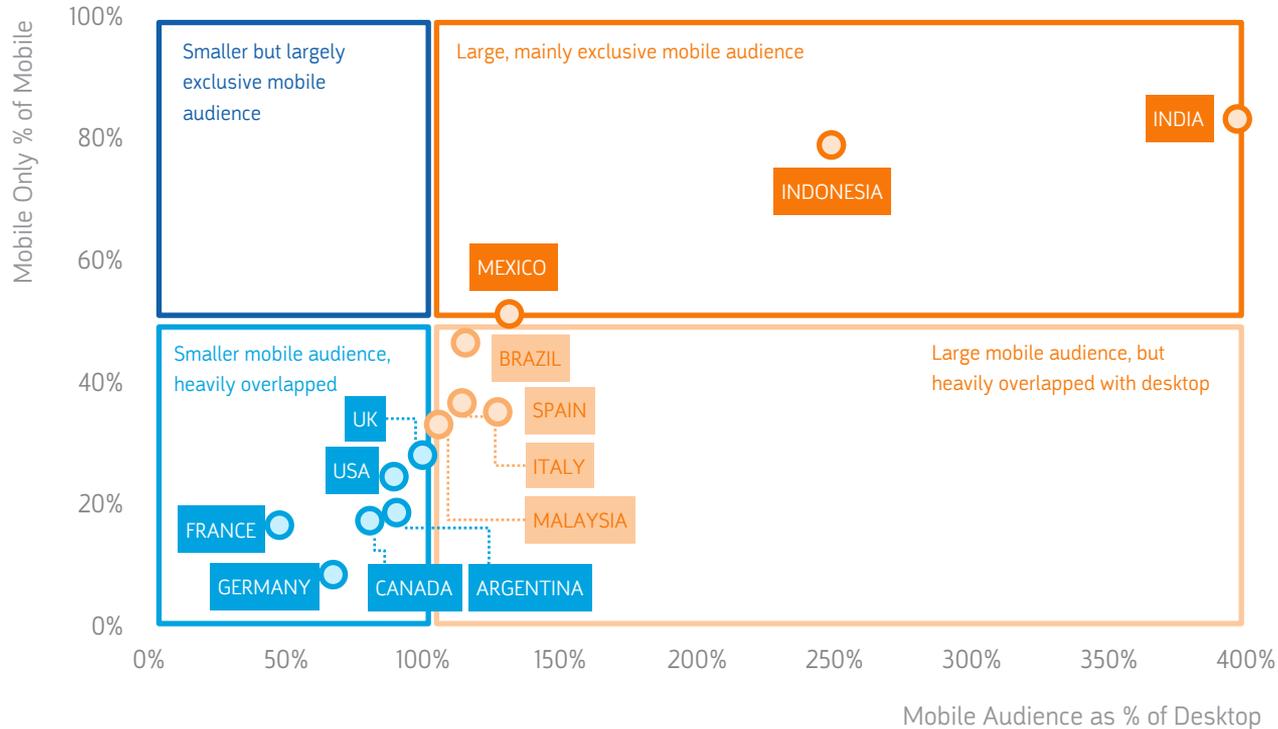


While time has shifted to mobile devices in all markets, the 13 examined in this report divide into two almost evenly-sized groups in terms of their per-platform audiences.

Disregarding overlap, there are 7 markets with more mobile users than desktop, but still 6 in which the overall desktop audience remains equal or larger.

Are mobile audiences duplicated or unique?

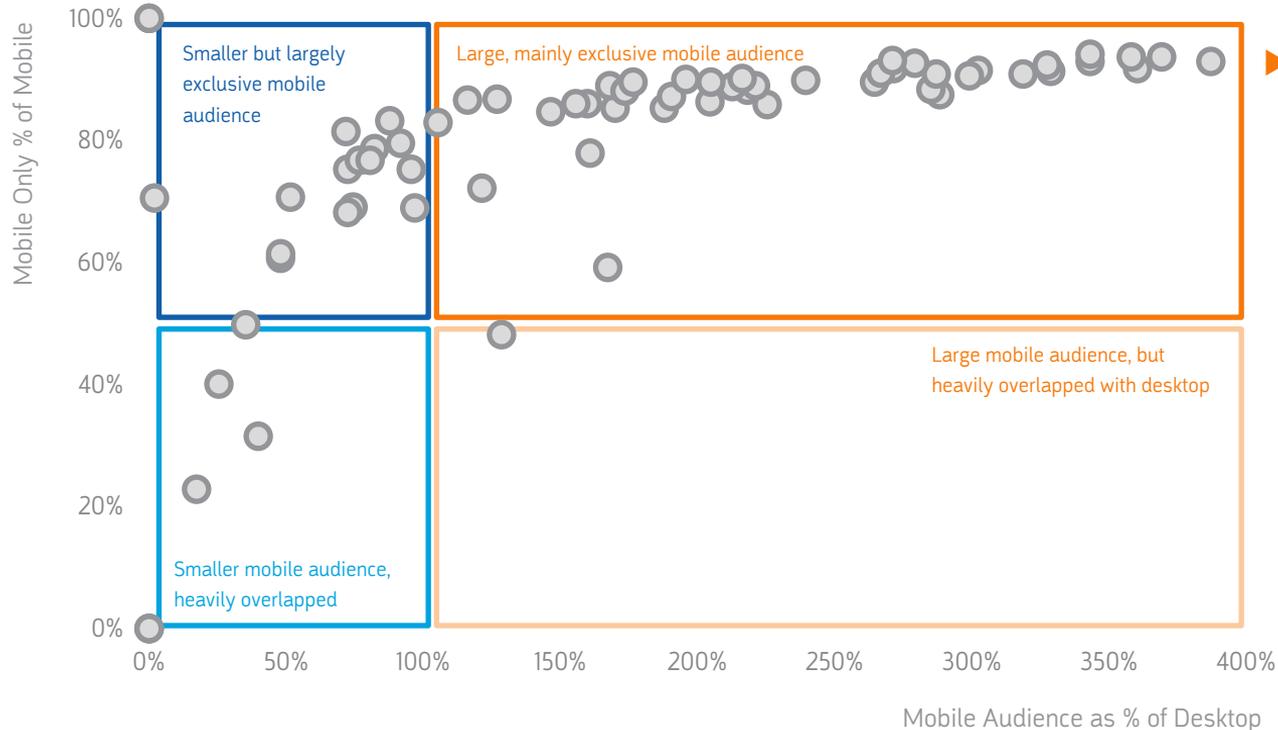
'Mobile-Firstness' of Markets' Total Digital Populations



Of the markets with larger mobile audiences, there is another almost even divide on the relative overlap of mobile users with desktop.

The data would suggest that in Mexico, Indonesia and India specifically, mobile has created 'new' digital audiences to a greater extent than in the other markets with larger mobile audiences.

Site-level audiences reinforce the need for granular understanding 'Mobile-Firstness' of Top 100 Properties (Mexico)



Applying the same filters to the top 100 properties (by reach) in a market such as Mexico, shows how 'mobile firstness' can be more dramatic at an individual property-level... there are many brands that audiences visit almost exclusively on mobile platforms, despite accessing others via desktop (as shown on the previous slide, where around half of mobile users are active on desktop also).

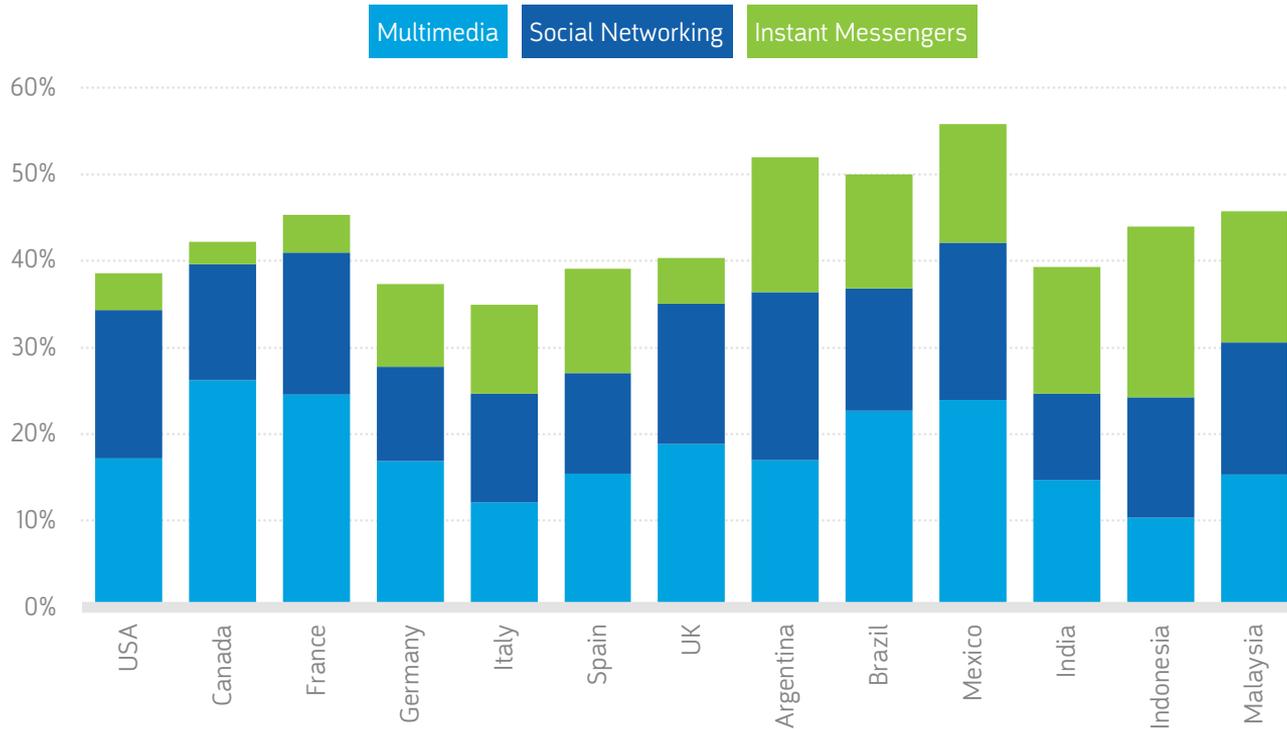
Category Focus

How have overall digital consumption patterns influenced content categories? Where are users spending time, increasing consumption and how are they balancing usage based on the best available device for the job?



Three subcategories capturing over a third of digital time

Share of Total Digital Minutes



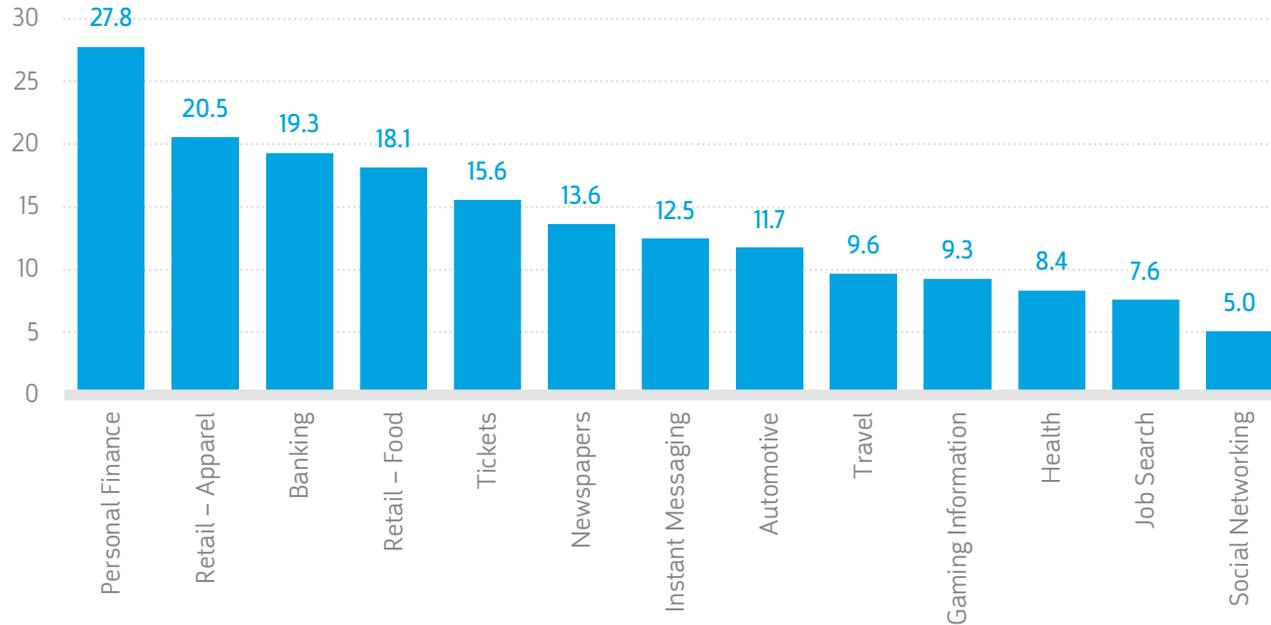
In some markets, three subcategories capture more than half of all digital time.

Multimedia (which includes several large video streaming services) and social networking drive the largest share in most markets.

The relative scale of instant messaging is particularly noteworthy since the minutes typically come almost exclusively from mobile platforms.

Uneven growth even at a broad, category level

Average YOY Point Increase in Reach for Selected Categories Across 8 Global Markets*

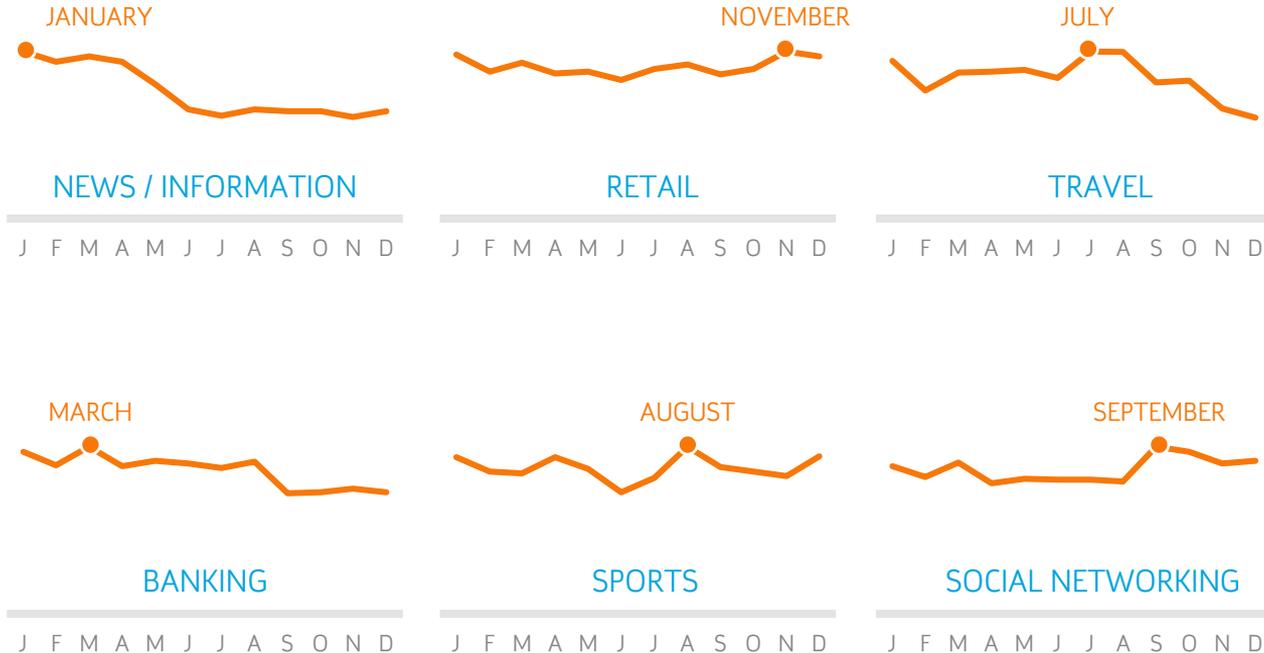


The importance of mobile has had a profound impact on usage and growth for categories and subcategories.

Even the selection included here exhibit dramatically different growth rates in average reach across markets. Instant messaging is an almost exclusively mobile activity, so impressive growth is tied heavily to that platform's adoption. Rapid personal finance gains perhaps reflect increasing comfort with mobile transactions.

Seasonality in UK digital consumption

Total Minutes by Content Category (Index vs. Top Month, 2017)

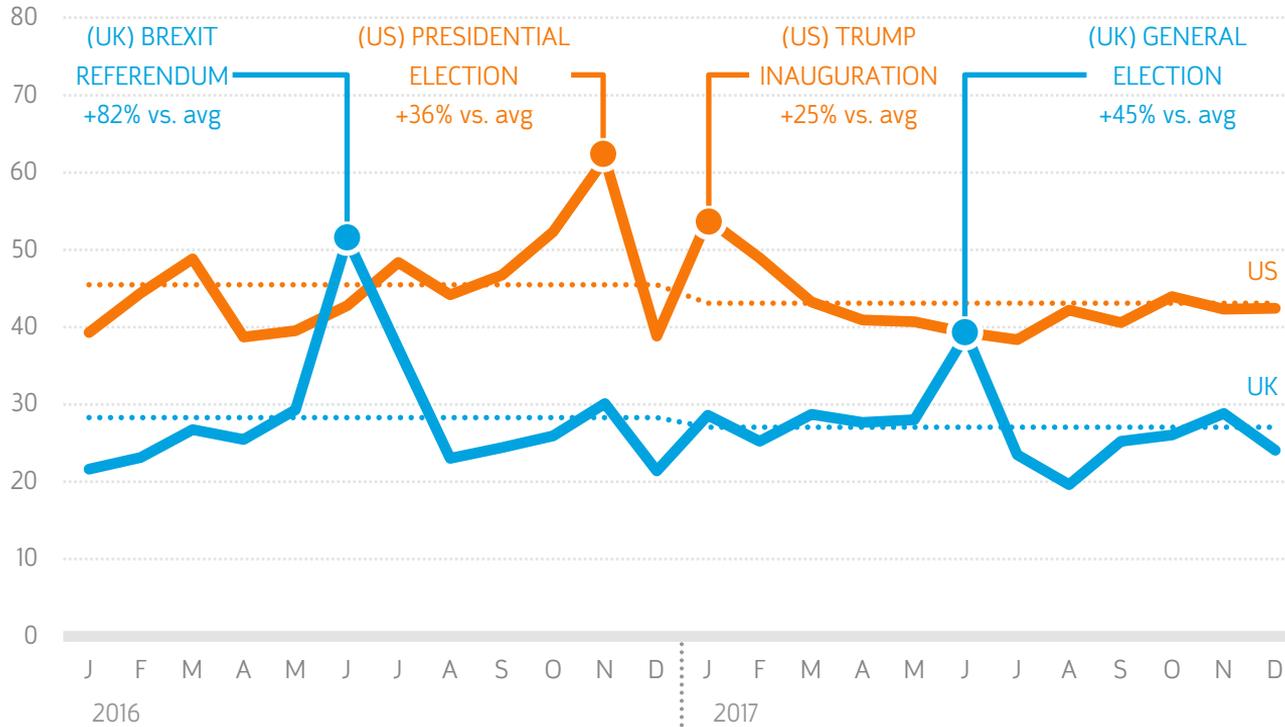


Despite being arguably the most 'always on' medium, digital displays a surprising level of seasonality, especially at a category level.

While some peaks in usage are common sense (retail around holiday periods, banking at end of tax year), it is interesting that less time-sensitive usage such as social networking is also relatively volatile in overall consumption.

Political events delivered major uplifts to digital consumption

Reach of 'News / Information – Politics' Category (US / UK)

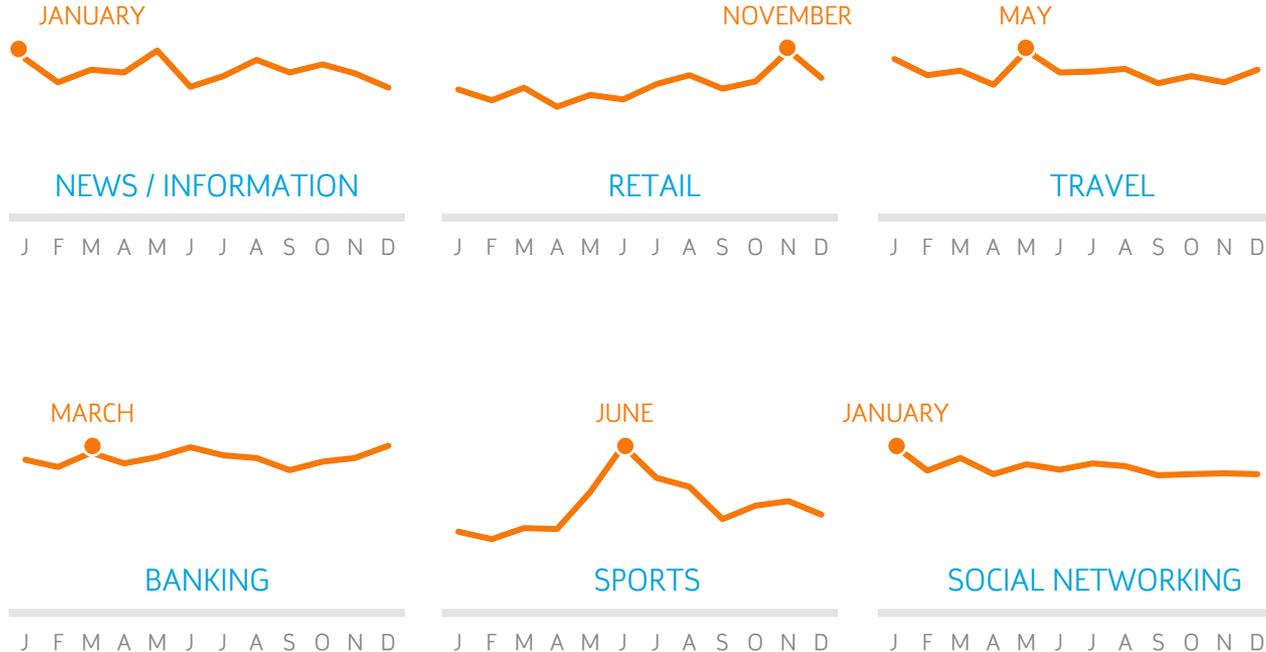


While some seasonality is traditional, real-world factors can dramatically shape consumption habits.

The politics category in the UK almost doubled in reach around the Brexit referendum in 2016, and other major political events in both the UK and US demonstrate dramatic changes in users' adoption and consumption.

Seasonality in Brazil digital consumption

Total Minutes by Content Category (Index vs. Top Month, 2017)

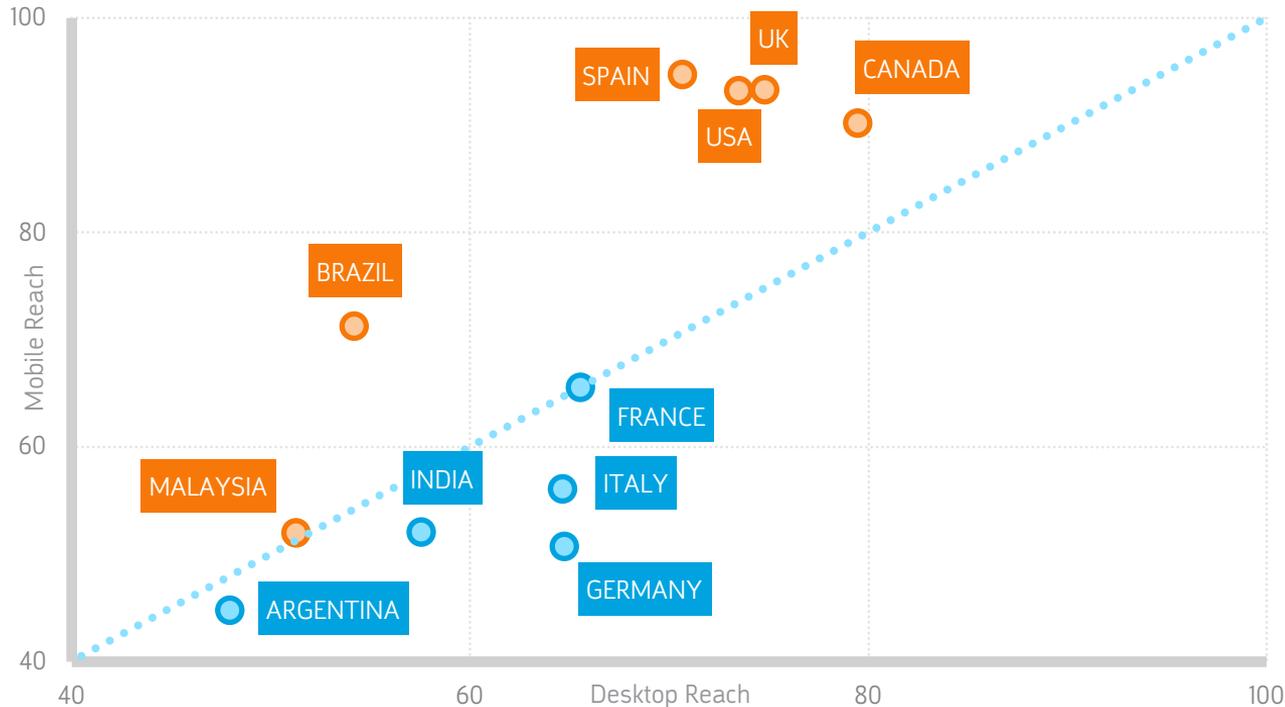


Compared to the patterns shown previously for the UK, Brazil exhibits differences in some categories based on different market conditions – Travel peaks earlier in May, and Sport in June.

Despite a Jan – Dec tax year, Brazil's banking category also peaked in March, possibly due to the tax return deadline the following month.

Category Bias: Business / Finance

Reach Among Desktop / Mobile Users for the 'Business / Finance' Category



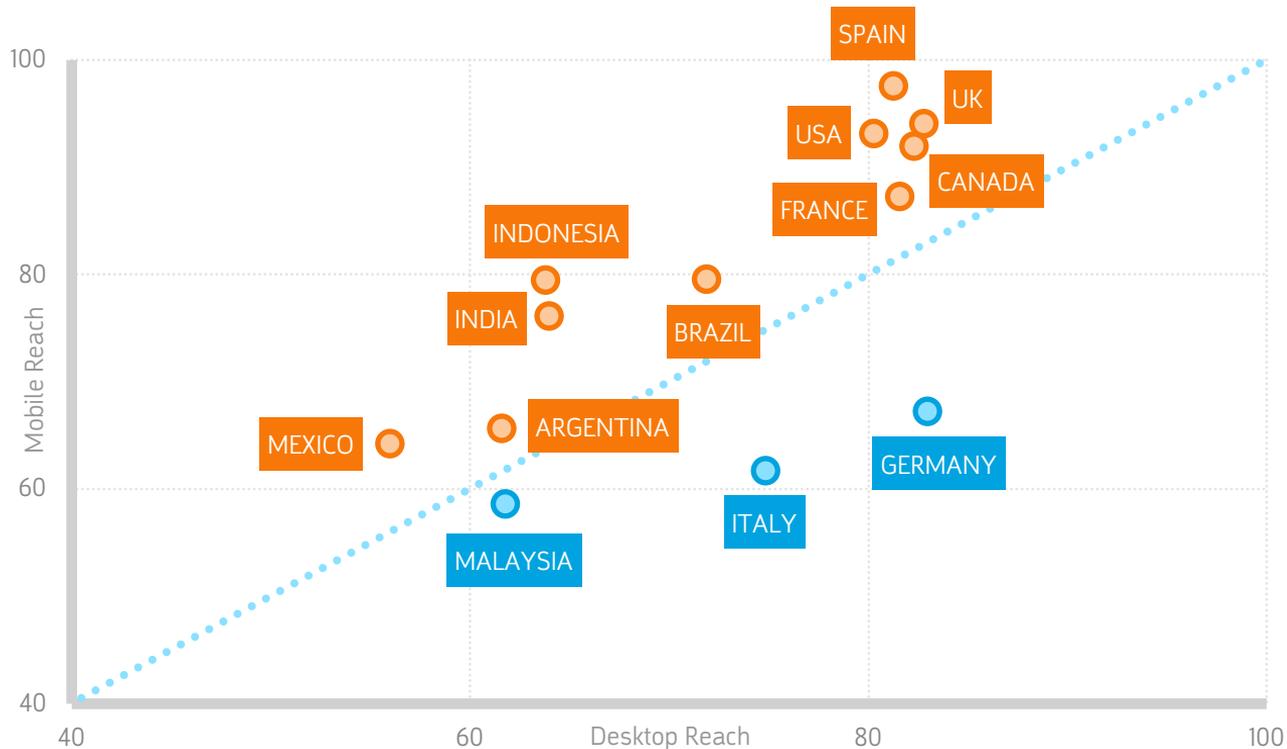
Note: Indonesia not shown in the visual due to desktop reach of 28.3% below axis minor limit (mobile reach is 43.6%)

Examining reach among each country's mobile and desktop populations can be an indicator of platform bias for that particular content type.

Business / Finance includes transactional functions such as banking, as well as financial information and news. Of the three categories we will compare in this manner, it sees the largest number of markets exhibiting a desktop bias, perhaps due to residual concerns about security and privacy on mobile devices.

Category Bias: Retail

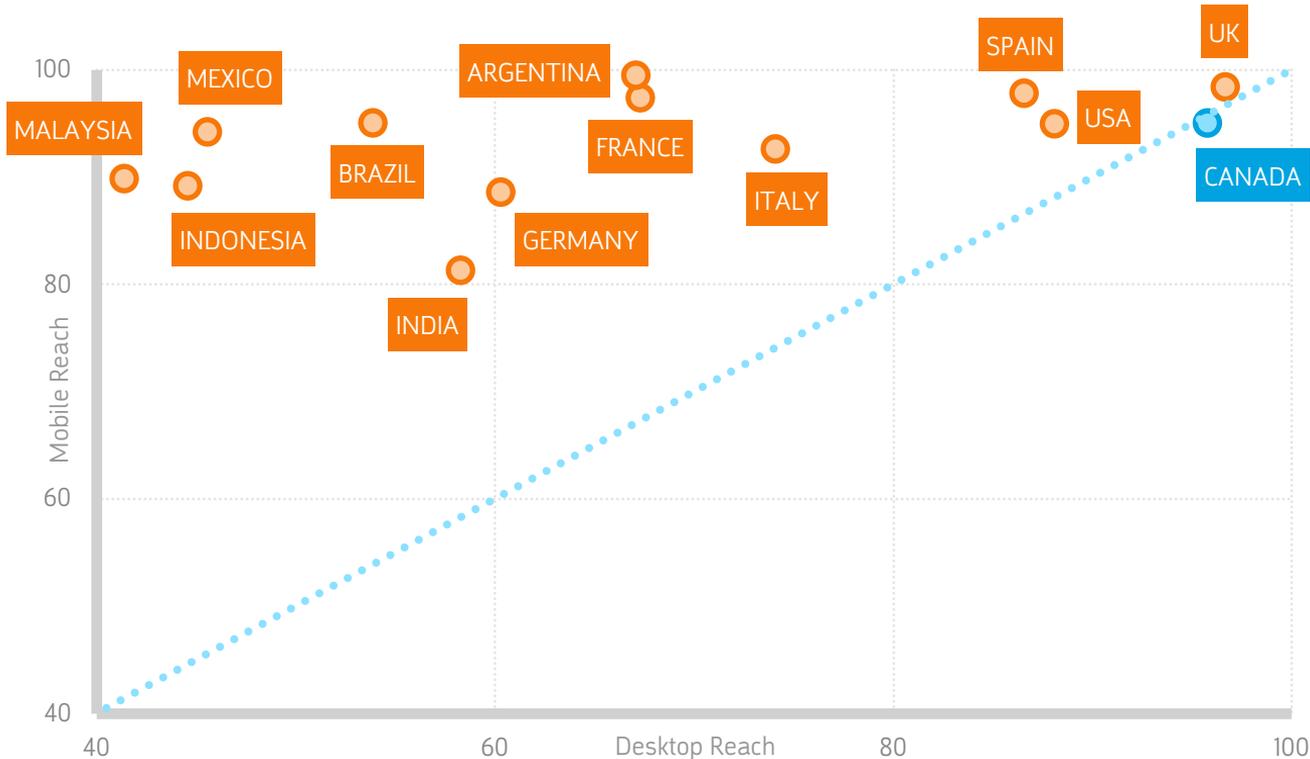
Reach Among Desktop / Mobile Users for the 'Retail' Category



In the majority of markets, retail has higher proportional audience reach among mobile users than desktop, most notably in Spain, where 97.5% of mobile users accessed the category in December 2017, and where there is a 16 point difference between the platforms.

Category Bias: News / Information

Reach Among Desktop / Mobile Users for the 'News / Information' Category

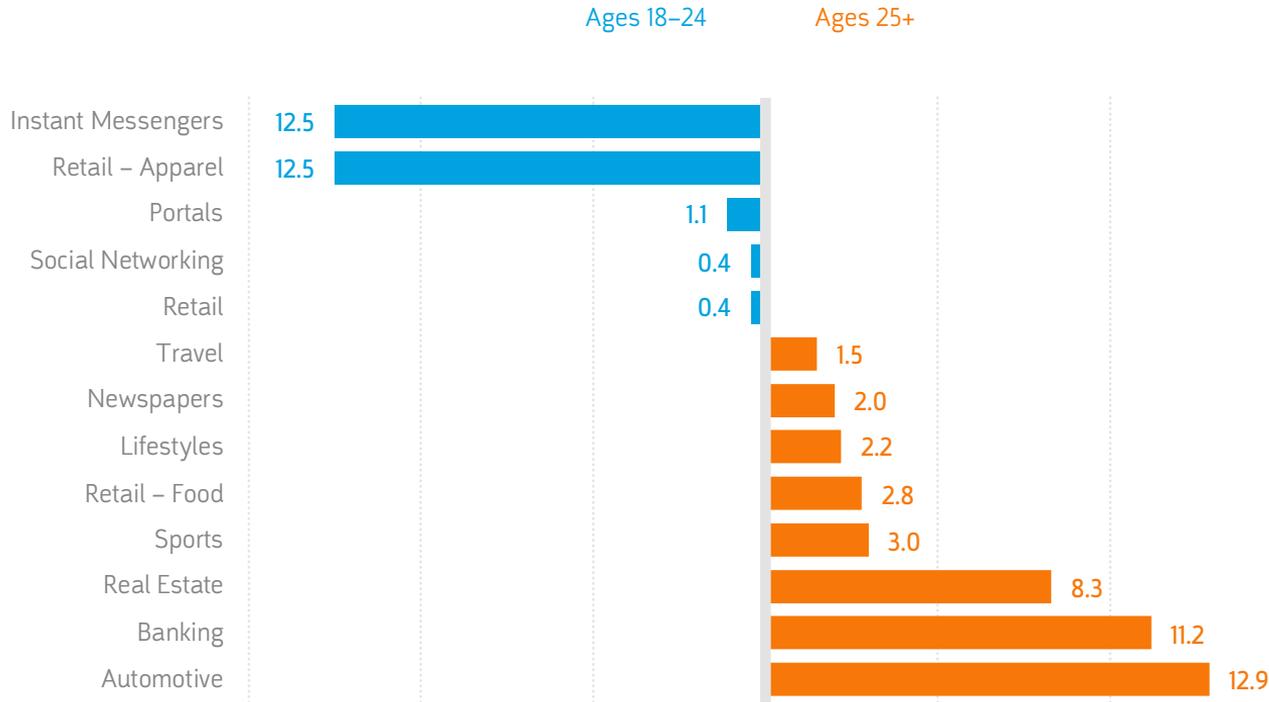


As a third category for comparison, news / information is often one of the highest-reaching categories on mobile devices, being accessed by more than 80% of users on those platforms in every market.

Only Canada has (marginally) higher reach among desktop users, although the category experiences 95% reach on both.

Demographics Categories (UK)

Points Difference in Reach Within 18 – 24 / 25+ Age Demographics



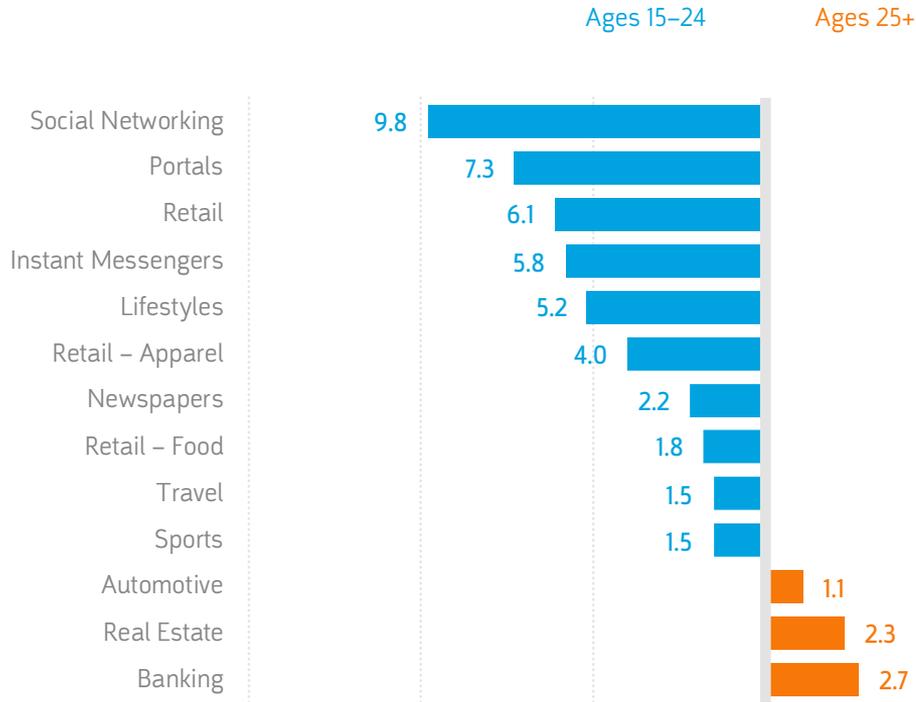
Reach within a demographic is one way of mitigating overall differences in composition of a market.

It also enables comparison of categories or individual properties to assess patterns in age groups' digital consumption.

For the selected categories shown in the UK, there are some dramatic (10+ point) differences in reach between under- and over-25s.

Demographics Categories (India)

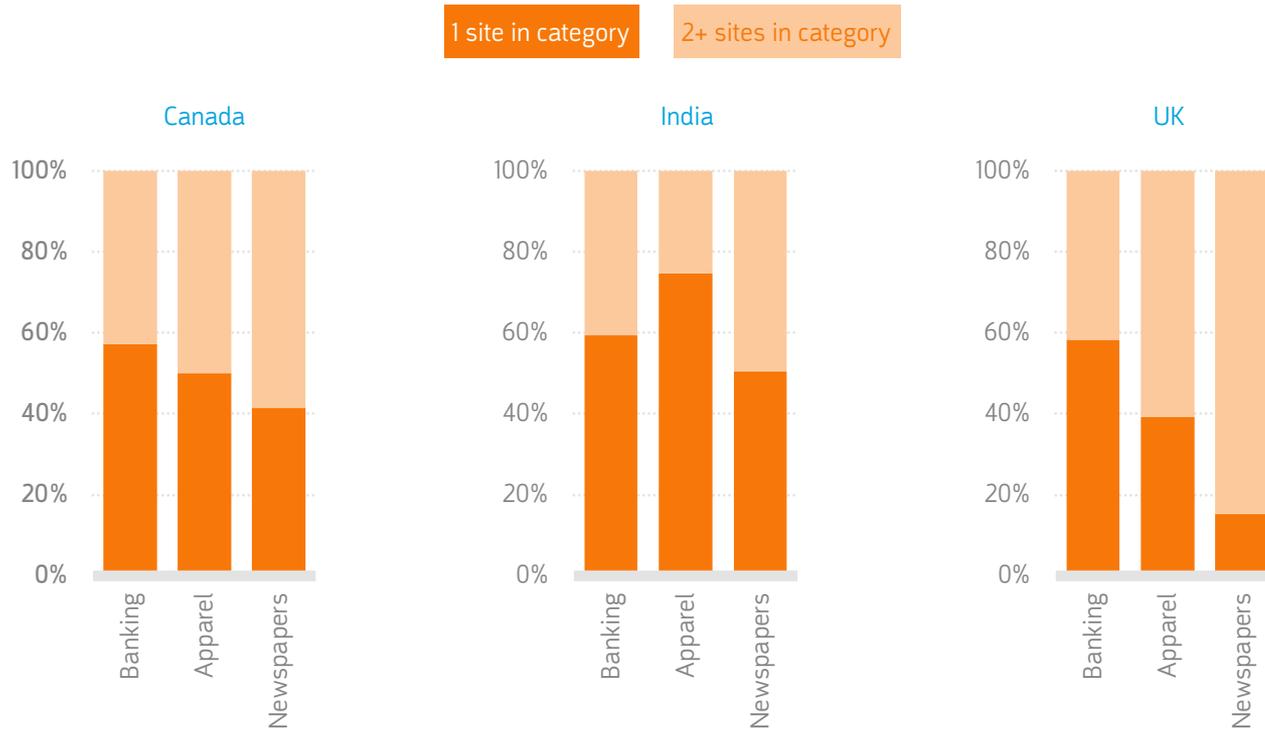
Points Difference in Reach Within 18 – 24 / 25+ Age Demographics



Applying the same comparison to the same categories reveals that India has less volatility between the two age breaks, suggesting that digital adoption for these categories is more universal than in the UK, although reach among under 25s is higher for a larger number of the categories.

Category Competitiveness

Audience Duplication as % of Total Category Users



Duplication of audiences between sites in a category could provide an indication of loyalty and competition.

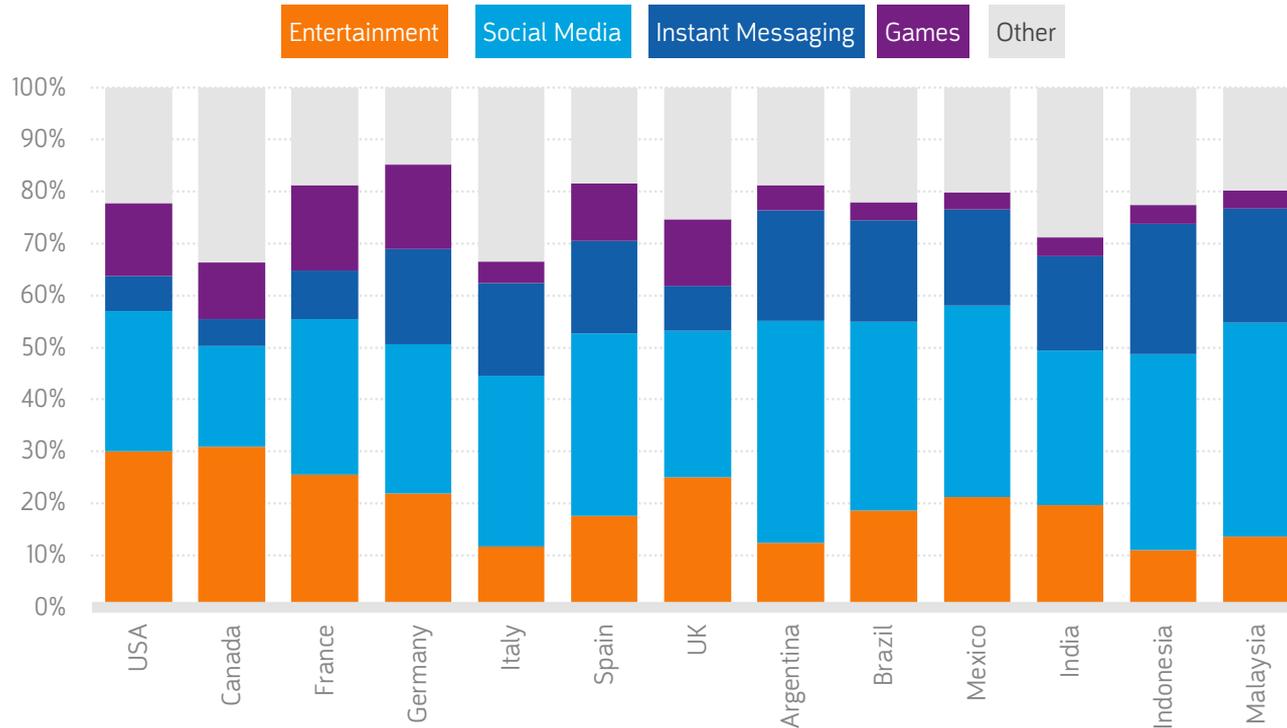
In all three markets shown, Newspapers had the highest proportion of users visiting 2 or more properties, suggesting users are less likely to be loyal to one provider – likely a factor of multiple entry points via social etc. Banking is a broadly ‘loyal’ category, with around 60% of users only accessing one brand in the category.

Spotlight on Apps

Now accounting for over 80% of mobile time, how has the app market evolved in the past year?

Four Categories Account for More Than 2/3 of App Minutes

Category Share of Total App Minutes

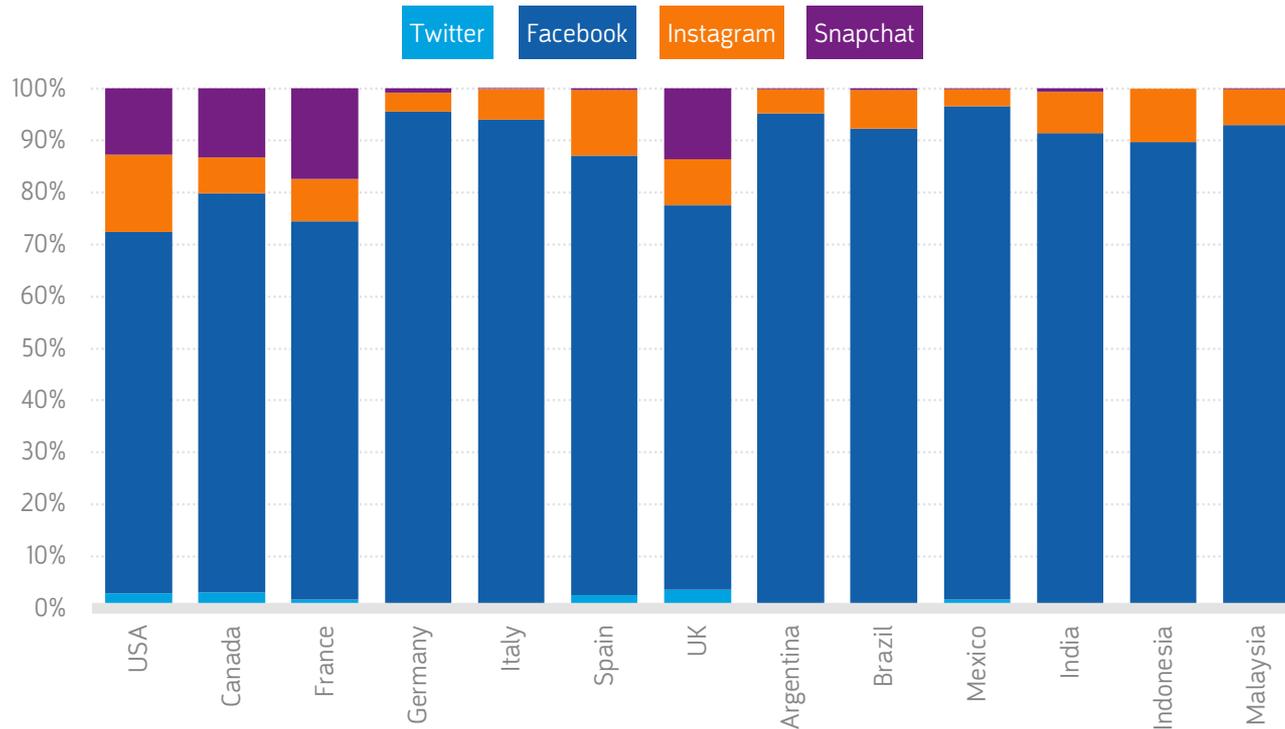


Despite the number of apps available to mobile users, overall time has concentrated heavily into four categories, which combine for more than two thirds of overall app time.

Social Media has the highest average share across all markets, although Entertainment leads the way in both the US and Canada.

Social Networks' Share of Time

Share of Combined Minutes for 4 Major Social Networking Apps

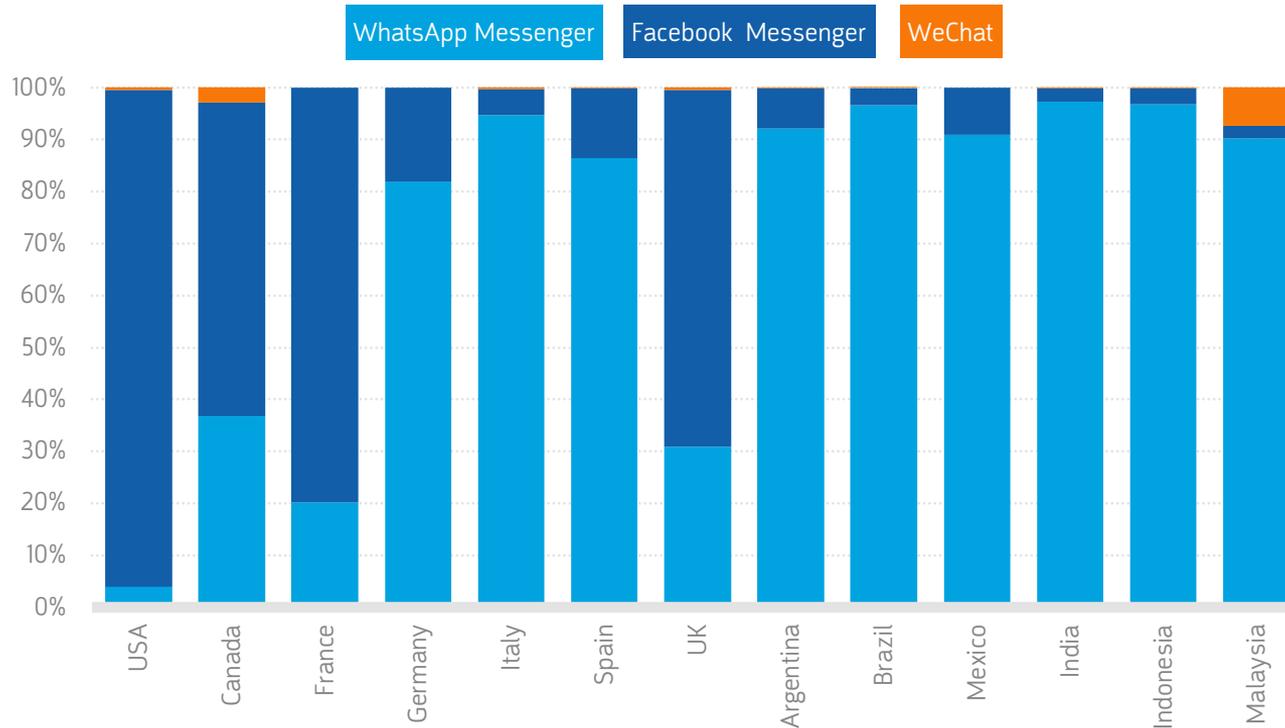


Facebook is the clear leader when examining the distribution of minutes between four key social networking apps, particularly when combining Instagram into its overall share.

We've seen evidence earlier in this report of Snapchat's increasing reach, and it will be interesting to observe how this translates into usage durations in 2018.

Messaging Share of Minutes

Share of Combined Minutes for 3 Major Instant Messaging Apps

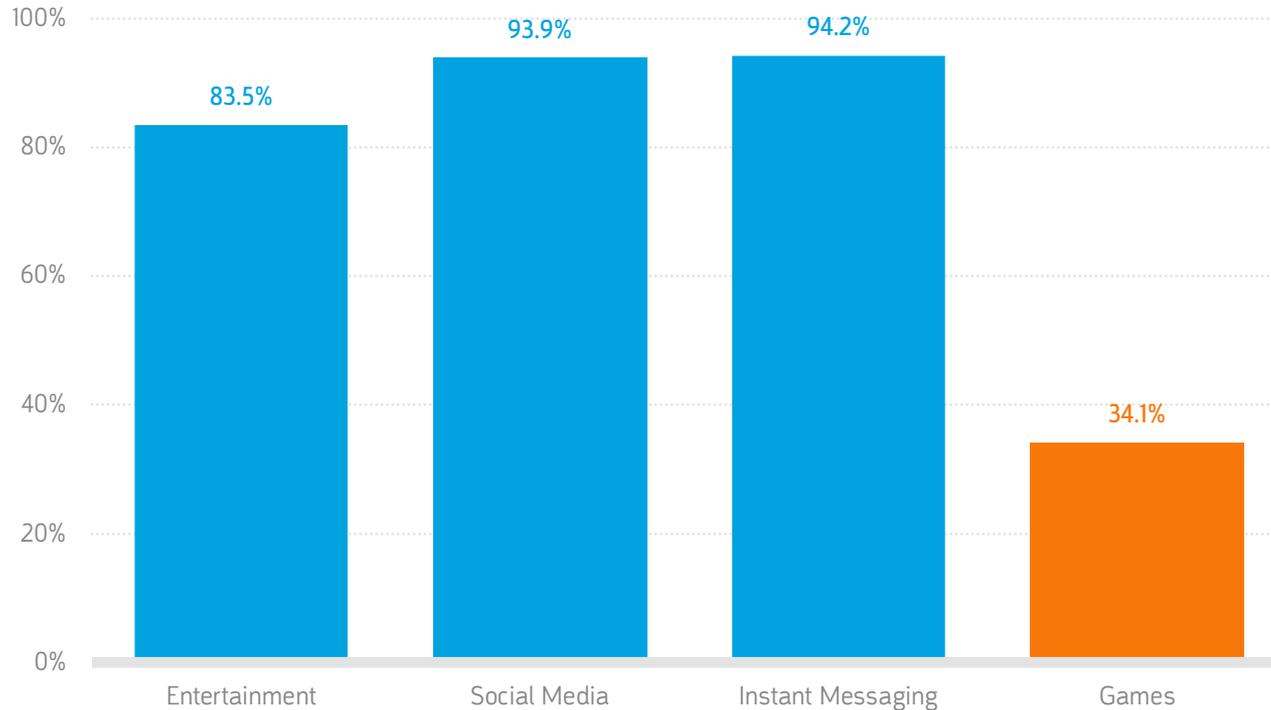


When it comes to instant messaging, WhatsApp messenger continues to reap the advantages of early adoption, dominating the majority of markets.

Facebook Messenger has however established greater share in four markets, and this continues to be a category to watch closely in 2018.

Gaming exhibits the biggest long tail of major app categories

Share of Total Category App Minutes for Top 5 Properties (US)

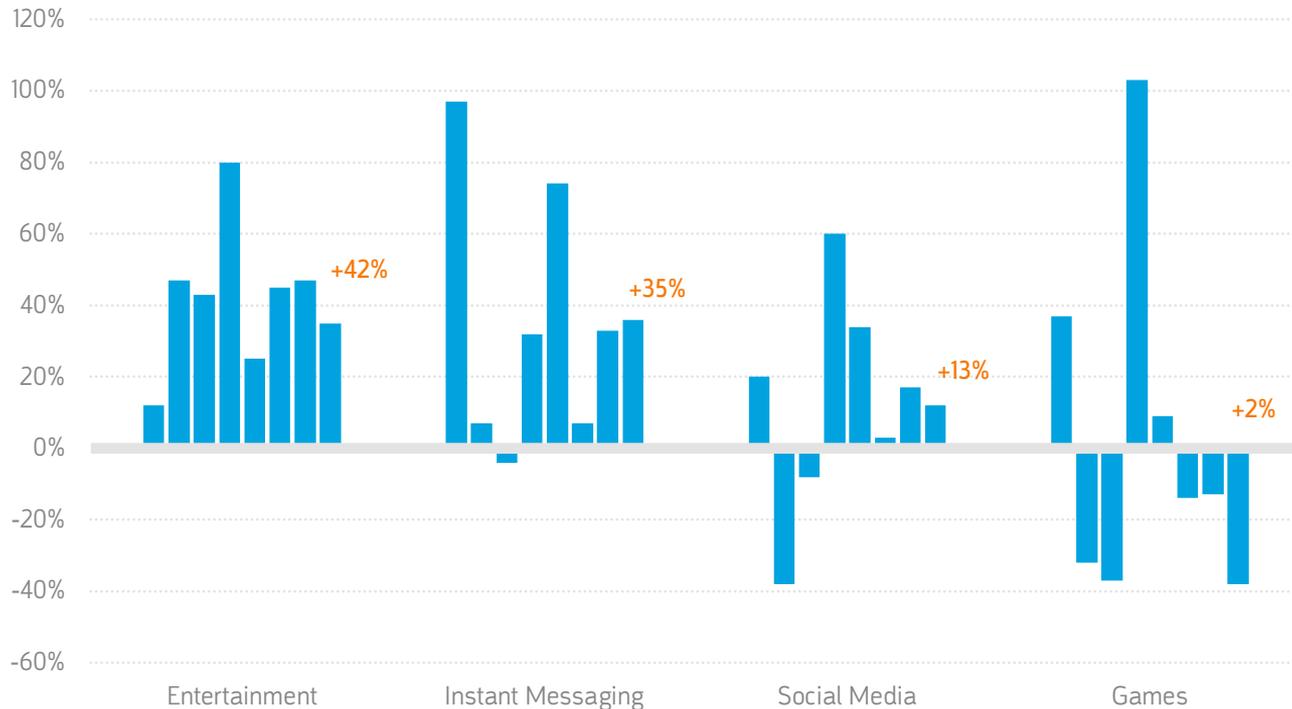


Of the four dominant app categories, Games are the least reliant on the top 5 properties to deliver overall consumption minutes.

It should be noted that this analysis refers to properties, including those that contain multiple apps such as Peak Games and Zynga. The top 5 individual apps deliver just 14.7% of total category app minutes.

Most popular categories get more popular (but not evenly)

Average Change in Total App Category Minutes (Dec. 2016 vs. Dec. 2017)



All four categories identified earlier in this section showed an average increase in total app minutes, with Entertainment and Instant Messaging the clear leaders.

Gaming, on the other hand saw a notable slow-down, with only 2% average growth, thanks to significant increases in Spain (excluding Spain the average would have been -13%).

Markets included, left to right: USA, Canada, Italy, Spain, UK, Brazil, Mexico, Indonesia

Source: comScore Mobile Metrix, Dec 2017

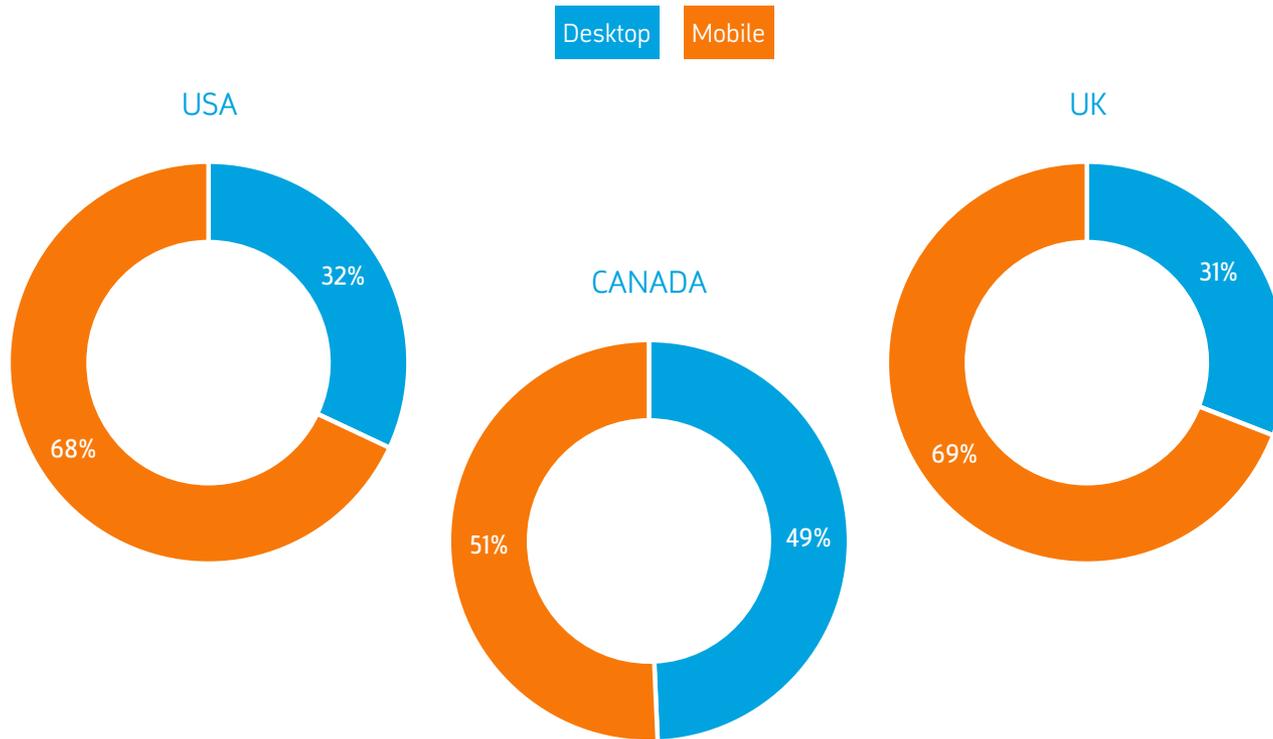
A young man and woman are looking at a laptop screen with expressions of joy and excitement. The man is on the left, wearing a grey t-shirt, and the woman is on the right, wearing a white tank top. They are both smiling broadly, and the woman has her right arm raised in the air. The background is bright and out of focus, suggesting an indoor setting with natural light. A blue decorative wave graphic is at the bottom of the image.

Spotlight on Video

How has video consumption shifted to mobile and multi-platform consumption?

Mobile accounts for dominant share of video views

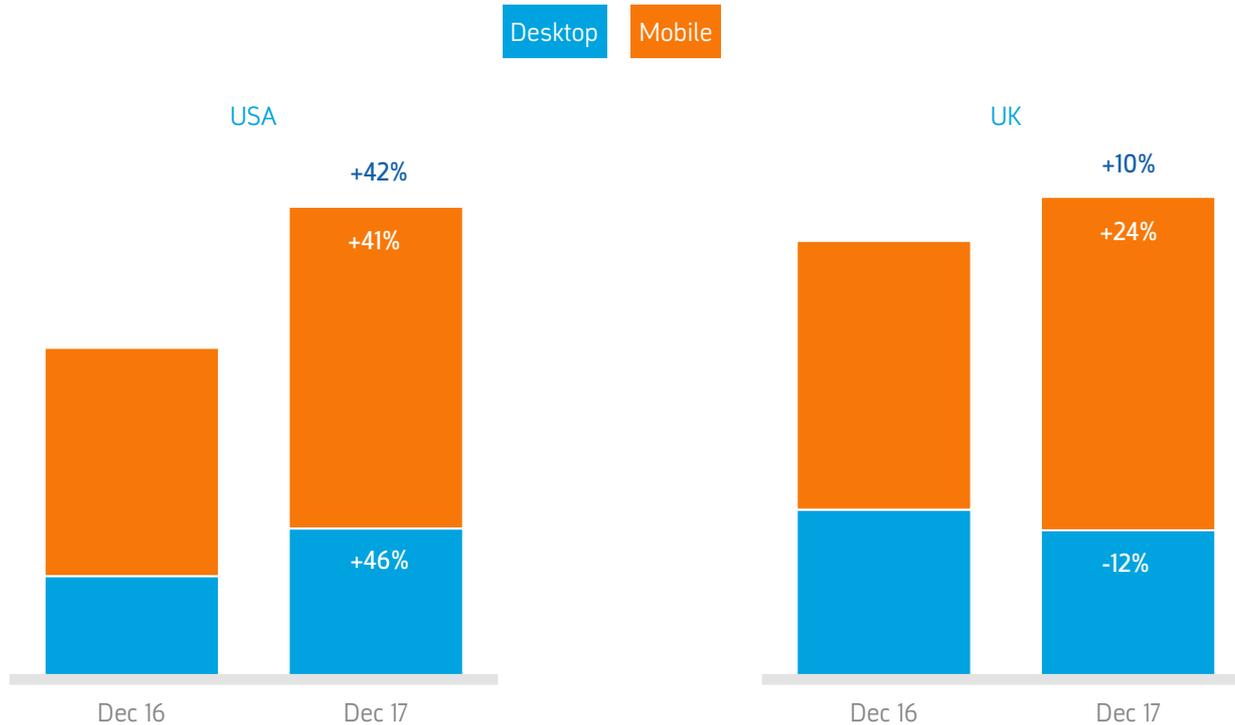
Share of Top 100 Properties' Videos by Platform



Perhaps unsurprisingly, video views for the top 100 properties in the three regions shown skew towards mobile devices, although by a smaller extent than overall digital minutes in all three markets.

Digital video growth is geographically uneven

Total Minutes for Top 100 Properties by Platform



Growth in consumption for the top 100 digital video properties varied considerably for the US and UK.

The US saw similar growth in consumption on both desktop and mobile, combining for 4x faster growth than the UK, which saw a slight decline in desktop consumption for these properties.

Video Metrix Multi-Platform COMING SOON



Coming soon to more international markets, **comScore Video Metrix® Multi-Platform** delivers a single, unduplicated measure of digital video consumption across desktop, smartphone, tablet and over-the-top (OTT) devices. Premium video content and advertising can be planned, bought and sold across platforms using TV-comparable GRP metrics that measure audience engagement.

Key Takeaways

Key Takeaways

- 1 Multi-platform consumption is still the norm, but “mobile only” is on the rise. Multi-platform users (those who access the internet via desktop and mobile in a month) still form the majority across markets, but the percentage of ‘mobile only’ users grew across the majority of markets over the course of 2017, surpassing 30% of users in nearly half of the markets considered.
- 2 There is evidence of digital consolidation, but optimistic growth beyond the top. The categories and entities that account for large shares of (especially mobile app) time have consolidated, but there is evidence of growth outside the top entities in terms of both time and number of properties crossing the 10% reach threshold.
- 3 Time has shifted to mobile, but some large desktop audiences impact ‘mobile firstness’. It can be easy to assume the shift of digital time to mobile has significantly shrunk the desktop marketplace, but from an audience point of view, many country / category desktop audiences remain larger, with corresponding considerations in reaching and marketing to these users.
- 4 Entertainment and video flourish on mobile platforms. Entertainment, already one of the major app categories, saw the highest average percentage growth in app time across those four major content types. Video consumption is now heavier on mobile devices, and video minutes on mobile platforms grew rapidly in both the US and UK.