## UKOM

# Digital Market Overview

July 2022

#### **The UK Digital Market Overview July 2022**

This Digital Market Overview focuses on UK online audience on PC, tablet and smartphone in July 2022.

Ipsos iris launched in 2021 as the new UKOM endorsed industry standard for the measurement of UK online audience behaviour.

Ipsos iris uses a different methodology from the previous supplier and so it is recommended that no comparisons nor trends are made between the two data sets.



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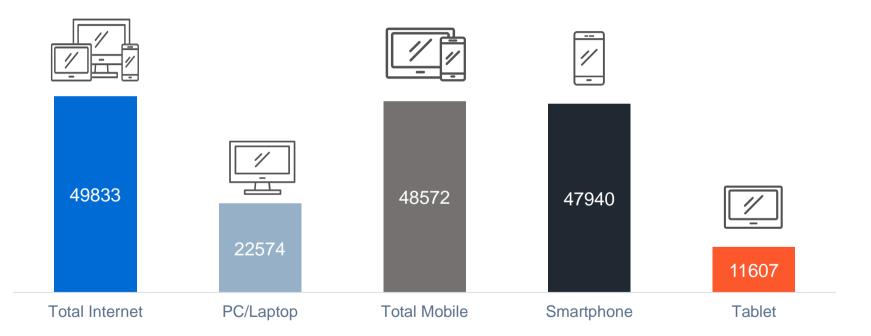
## Audience by device



#### **Online audience by device (000s)**

More than twice as many people use smartphones than computers





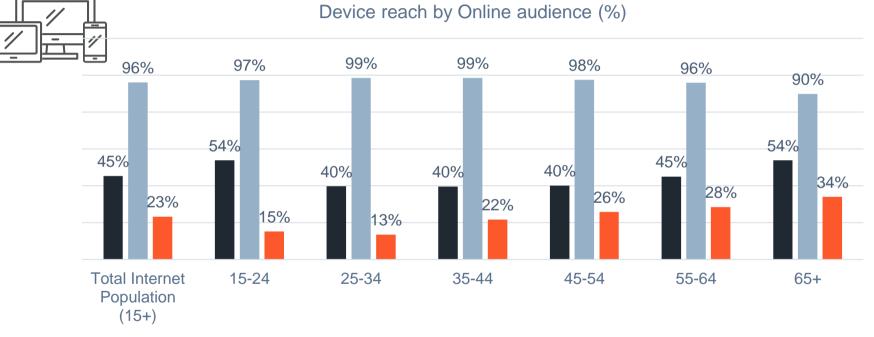


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### **Device split by age**

Reach of tablets increases with increasing age





PC/Laptop Smartphone Tablet



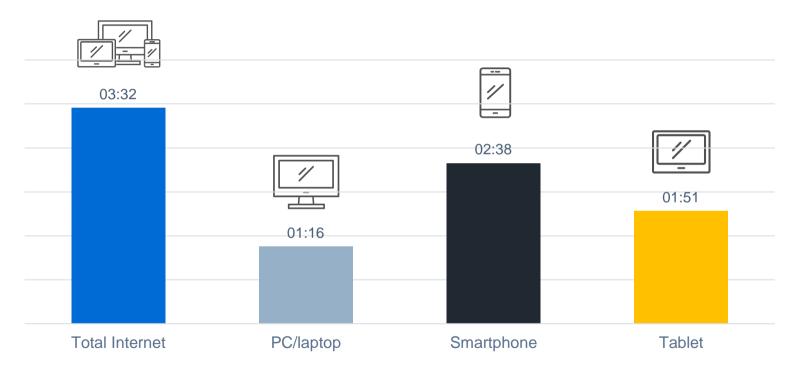
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

## **Time online**

#### Average time spent online per day by device (hh:mm)



Smartphone users drive time online - they spend on average over 2.5 hrs a day using their device



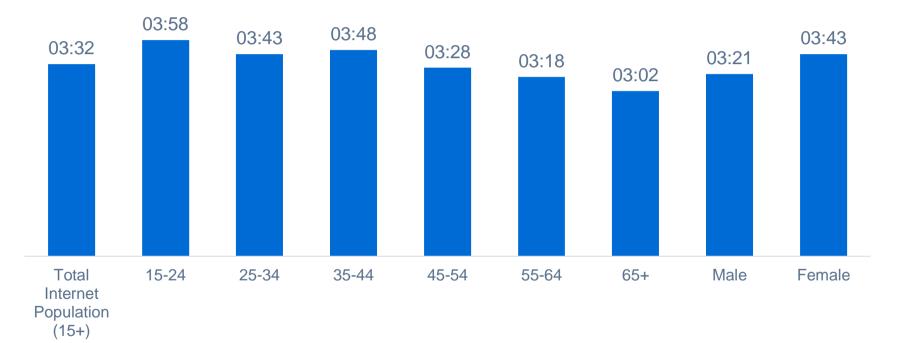


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Averages are based on users of each device.

#### Average time online per day - age & gender (hh:mm)

Younger audiences and females spend most time online



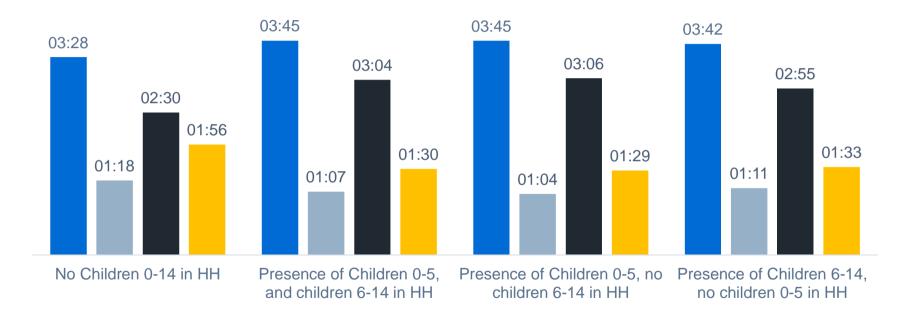
lpsos

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### Average time online per day – households with kids (hh:mm)

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Parents with children aged 0-5 spend longer online, primarily on smartphones



■ Total Internet ■ PC/laptop ■ Smartphone ■ Tablet

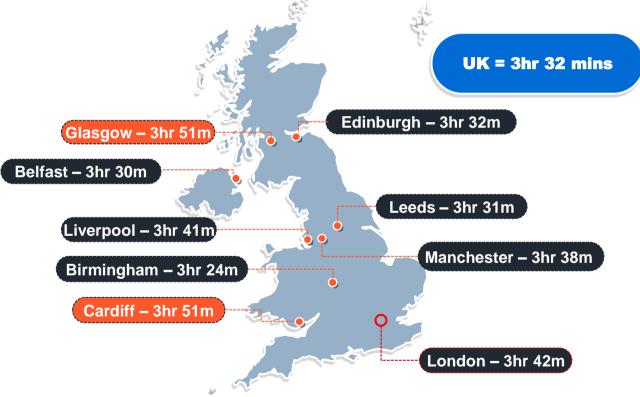
Ipsos

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Averages are based on users of each device.

#### Average time online per day by city (hh:mm)

Residents of Glasgow & Cardiff spend 27 more minutes per day online than those in Birmingham



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

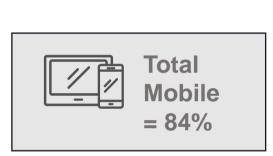
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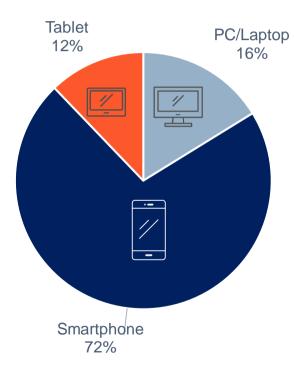


#### **Share of minutes by device**

Smartphones account for 72% of time online





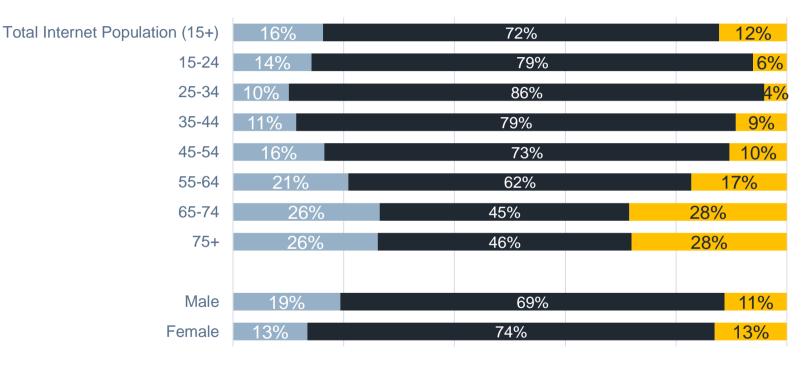




Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### **Device share of minutes by age and gender**

Females and younger audiences spend a greater share of time on smartphones



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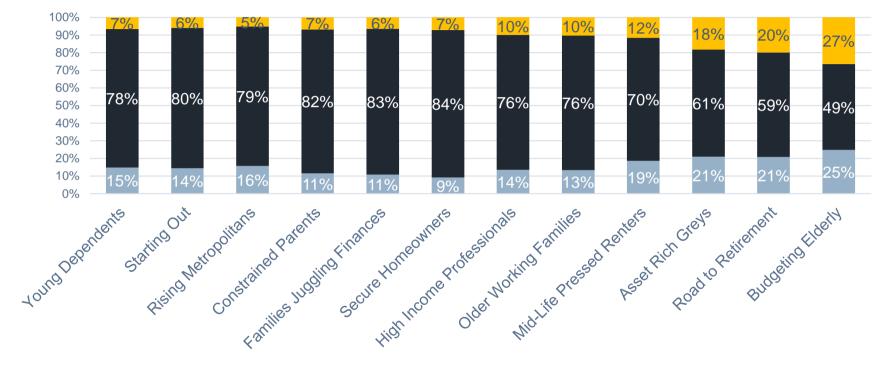
■ PC/Laptop ■ Smartphone ■ Tablet

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

lpsos

#### **Device share of minutes by Fresco segment**

Lifestage & Affluence impacts device usage- tablets are popular for the 'budgeting elderly' segment



PC/Laptop Smartphone Tablet

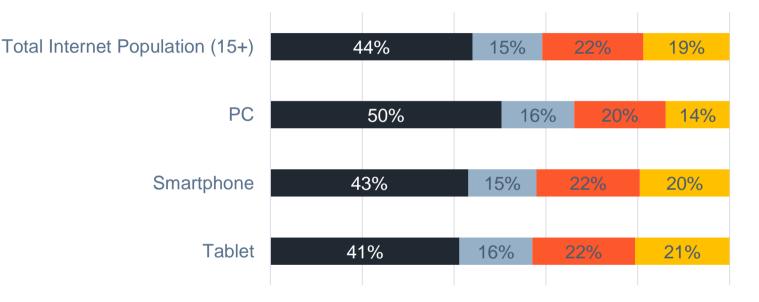
lpsos

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022



#### **Daypart share of minutes by device**

Pcs are more likely to be used in the morning and afternoon.



Morning and Afternoon (09:00-17:29)
Late Peak & Late Night (20:00-23:59)

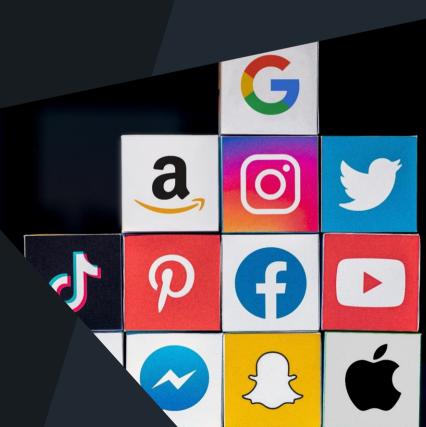
Early Peak (17:30-19:59)
Night Time & Breakfast (00:00-08:59)



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022



### Top organisations and brands



#### **Top 20 organisations by audience**

11 of the top 20 organisations with the largest UK online audiences are British companies



	Re	ach %	Audience (000s)
	Alphabet	99.5	49,572
Meta	(previously Facebook Sites)	97.4	48,546
	Amazon, Inc	90.1	44,910
	Microsoft Corporation	82.9	41,327
	<b>BBC Corporation</b>	78.6	39,186
	Reach Plc	75.7	37,700
	eBay Inc	66.5	33,125
	Mail Metro Media	64.3	32,032
	UK Government	63.8	31,773
	NHS Sites	<b>62.4</b>	31,105
	News UK Sites	62.4	31,101
	PayPal Inc	60.3	30,039
	Twitter	59.1	29,469
	Apple Inc	56.5	28,170
	Sky	54.6	27,217
	J Sainsbury plc	50.0	24,918
	Wikimedia Foundation Inc	<b>49.0</b>	24,402
The Independent	and The Evening Standard	<b>48.0</b>	23,932
	Future Plc	47.3	23,573
	Hearst	43.6	21,731



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### **Top 20 online <u>brands</u> by audience**

US global brands dominate the top 10



R	each %	Audience (000s)
Google	99.2	49,413
Facebook & Messenger	93.7	46,702
YouTube	91.4	45,528
Amazon	88.8	44,225
Whatsapp	85.1	42,394
BBC	78.6	39,186
Instagram	74.0	36,879
Microsoft	73.9	36,834
eBay	64.8	32,270
NHS	62.4	31,101
PayPal	<b>59.9</b>	29,826
Twitter	59.1	29,469
The Sun	55.9	27,867
Apple	<b>53.0</b>	26,419
Gov.uk	49.9	24,862
Wikimedia	49.0	24,393
Mirror	48.5	24,146
Mail Online	48.2	24,042
The Independent	43.9	21,883
The Guardian	41.4	20,629





Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### **Top 10 <u>organisations</u> by audience & minutes**

Meta takes the no.1 spot ahead of Alphabet for Total minutes

	Media	Audience (000s)	Audience Reach (%)
1	Alphabet	49,572	99.5
2	Meta (previously Facebook Sites)	48,546	97.4
3	Amazon, Inc	44,910	90.1
4	Microsoft Corporation	41,327	82.9
5	BBC Corporation	39,186	78.6
6	Reach Plc	37,700	75.7
7	eBay Inc	33,125	66.5
8	Mail Metro Media	32,032	64.3
9	UK Government	31,773	63.8
10	NHS Sites	31,105	62.4

	Media	Total Mins (MM)	Avg. Mins PP
1	Meta (previously Facebook Sites)	74,441	1533:25
2	Alphabet	56,145	1132:36
3	BBC Corporation	9,855	251:29
4	Amazon, Inc	8,397	186:59
5	Snap Inc	8,333	713:20
6	*Bytedance Inc.	8,172	446:03
7	Microsoft Corporation	7,129	172:30
8	Twitter	4,783	162:19
9	Netflix Inc	3,892	241:19
10	eBay Inc	3,272	98:47



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/out of focus. \*TikTok App time online currently under investigation



#### Top 10 brands by audience & minutes

Social media brands dominate the top 10 for time



	Media	Audience (000s)	Audience Reach (%)		Media
1	Google	49,413	99.2	1	Faceboo Messeno
2	Facebook & Messenger	46,702	93.7	2	YouTube
3	YouTube	45,528	91.4	3	Google
4	Amazon	44,225	88.8	4	Instagra
5	Whatsapp	42,394	85.1	5	Whatsap
6	BBC	39,186	78.6	6	BBC
7	Instagram	36,879	74.0	7	Snapcha
8	Microsoft	36,834	73.9	8	*TikTok
9	eBay	32,270	64.8	9	Amazon
10	NHS	31,101	62.4	10	Microsof

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	50,416	1079:31
2	YouTube	30,440	668:36
3	Google	25,705	520:12
4	Instagram	13,081	354:42
5	Whatsapp	10,927	257:46
6	BBC	9,855	251:29
7	Snapchat	8,330	732:37
8	*TikTok	8,164	445:44
9	Amazon	7,384	166:57
10	Microsoft	5,425	147:17

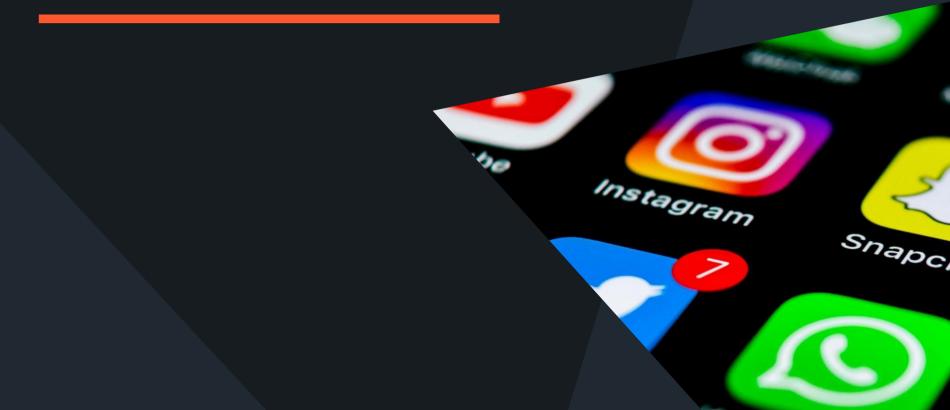


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'. \*TikTok App time online currently under investigation

#### Top mobile apps



#### Top 20 mobile <u>apps</u> by audience

9 of the top 10 'Audience' apps are from Google or Meta (Facebook)

Reach %



Г		
Whatsapp	84.5	42,095
Facebook	83.0	41,359
YouTube	72.7	36,230
Google Maps	71.9	35,804
Facebook Messenger	68.1	33,943
Instagram	64.8	32,268
Amazon	57.8	28,798
Gmail	55.4	27,621
Google Play Store	51.4	25,601
Google Play Services		23,253
Apple Music		21,329
	41.7	20,786
Microsoft Outlook		19,594
Twitter	37.6	18,753
Spotify	35.5	17,704
Google Drive		17,457
Google Photos		16,740
Apple News		14,781
Netflix		12,668
PayPal Mobile Cash		12,342
,		





Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

#### **Top 10 mobile apps by audience & minutes**

High 'time per person' propels TikTok and Snapchat into the top 10 for total app minutes

	Media	Audience (000S)	Audience Reach (%)
1	Whatsapp	42,095	84.5
2	Facebook	41,359	83.0
3	YouTube	36,230	72.7
4	Google Maps	35,804	71.9
5	Facebook Messenger	33,943	68.1
6	Instagram	32,268	64.8
7	Amazon	28,798	57.8
8	Gmail	27,621	55.4
9	Google Play Store	25,601	51.4
10	Google Play Services	23,253	46.7

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	43,906	1061:34
2	YouTube	22,300	615:31
3	Instagram	12,823	397:24
4	Whatsapp	10,807	256:44
5	Snapchat	8,304	737:50
6	*TikTok	8,081	675:05
7	Google Maps	4,624	129:09
8	Gmail	4,044	146:24
9	Twitter	3,332	177:41
10	Netflix	2,883	227:37



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'. \*TikTok App time online currently under investigation



### Top 10 apps by minutes by mobile device

A majority of the smartphone top 10 are social apps but video apps ranks highly for tablet time.



#### Smartphone Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	37,110	920:52
2	YouTube	16,569	482:06
3	Instagram	12,351	395:07
4	Whatsapp	10,690	254:47
5	Snapchat	8,274	737:05
6	*TikTok	7,938	678:53
7	Google Maps	4,430	126:11
8	Gmail	3,438	127:57
9	Twitter	3,199	175:09
10	Facebook Messenger	2,692	80:52



	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	6,796	929:24
2	YouTube	5,732	1024:46
3	Netflix	1,076	461:52
4	BBC iPlayer	862	402:47
5	Gmail	606	196:37
6	Yahoo Mail	506	838:26
7	YouTube Kids	496	1746:38
8	Instagram	472	158:27
9	BBC Sounds	425	400:10
10	BBC News	418	221:44



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

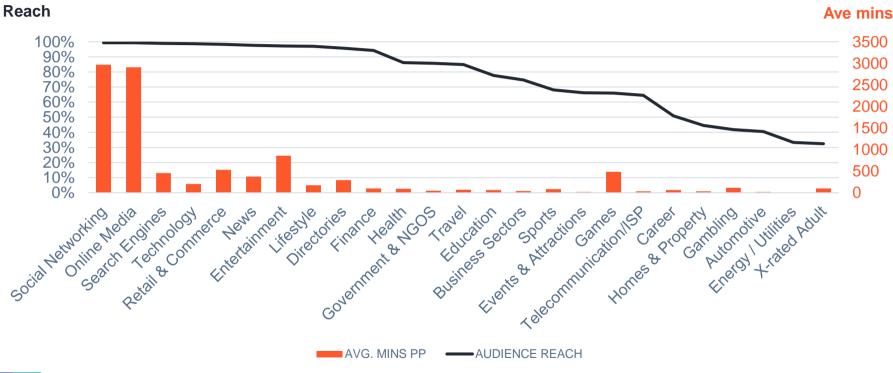
NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'. \*TikTok App time online currently under investigation



# **Category Comparisons**

#### Reach & avg. mins pp by tier 1 category – July 22

Social networking = high reach & high engagement. Gaming = low reach, high engagement.



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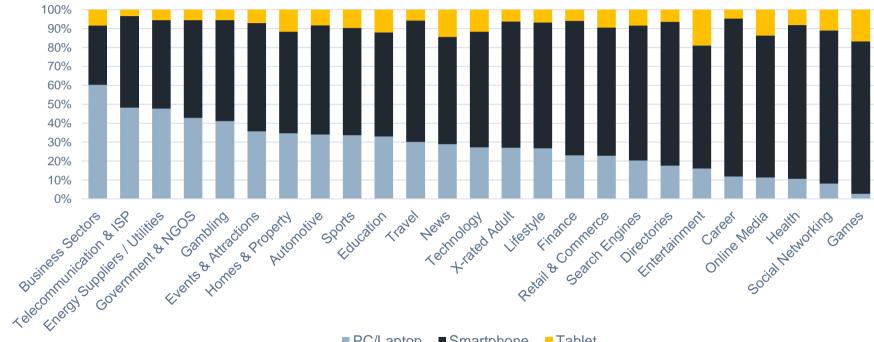
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/out of focus'

#### Share of minutes by device by tier 1 category

Content type significantly influences choice of device.



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PC/Laptop Smartphone Tablet



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

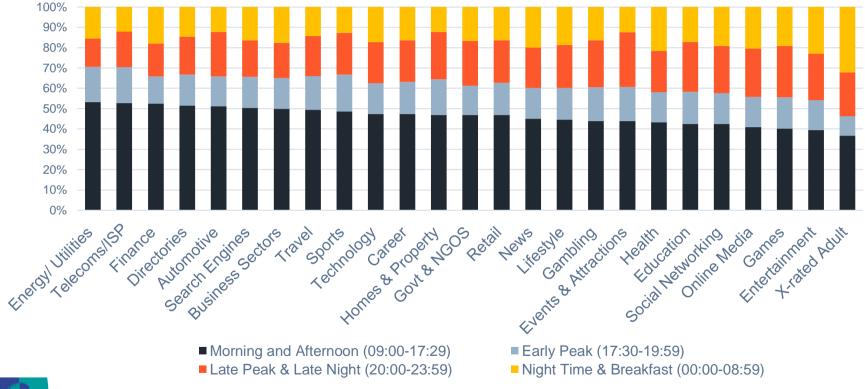
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/out of focus'

#### Share of minutes (%) by daypart by tier 1 category



Utilities, telecoms and finance during the day; Entertainment, events & gaming in the evening.





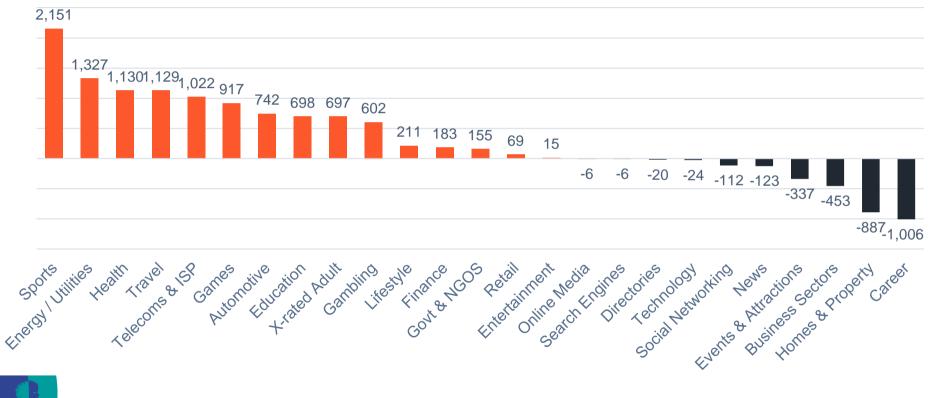
Source: Ipsos, Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/out of focus'

#### Tier 1 category audience change (000s): May-July 22

The Women's Euros, Wimbledon & Birmingham 2022 contributed to the increase in Sports



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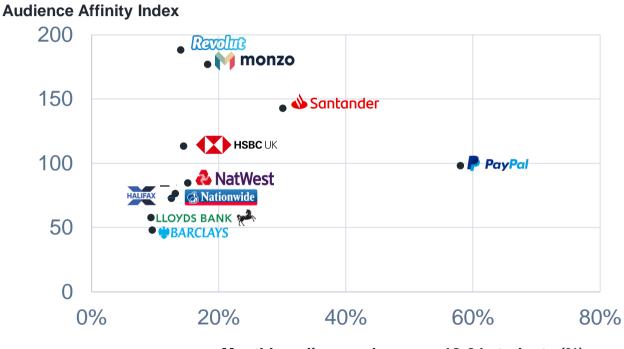
Source: UKOM Ipsos iris Online Audience Measurement Service, May and July 2022

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## In the News



# **Top banking brands by online reach among students aged 18-24 in full-time education**



Monthly online reach among 18-24 students (%)

 18-24 students are more likely than average to visit digital only brands Revolut and Monzo



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Freshers' week is looming – but before the big university adventure begins it is important to get your finances in order





Source: UKOM Ipsos iris Online Audience Measurement Service, Ranking Report June 2022. Students = Full-time Education. Category = T2 Finance: Banking & Loans

#### Audience to UEFA's website during the women's Euros Semi-Final and Final in 2022



UEFA Website Audience (000s) Women's Euros 2022





—Males —Females

Source: UKOM Ipsos iris Online Audience Measurement Service, Daily Data : 21st July 2022 - 1st August

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

 The day after the Sweden match and during the days running up to the final, more females than males visited the site



England 2-1 Germany (aet): Kelly gives Lionesses Wembley final triumph

Sunday 31 July 202

0.

Hosts England sent a record 87,192 Wembley crowd into dreamland as they won their first major title by beating Germany in extra time.



# Audience to SVOD <u>mobile apps</u> between January and July



		AUDIENCE (000S)			
	JAN '22	JUL '22	Change (%)	Change (abs)	
SVOD Mobile Apps	20,992	20,093	-4.3 %↓	-899	
Netflix	13,562	12,668	-6.6 %↓	-895	
Amazon Prime Video	6,868	6,512	-5.2 %↓	-356	
Disney	3,600	4,634	28.7 %个	1,034	
NOW TV	1,479	1,243	-16.0 %↓	-236	
BT Sport	1,312	555	-57.7 %↓	-757	
Apple TV	1,035	533	-48.5 %↓	-503	
discovery+	435	353	-18.8 %↓	-82	
BritBox	337	296	-12.1 %↓	-41	

 In July, overall audiences were down for most subscription TV on demand mobile apps between January and July 2022 with the exception of Disney.



#### Thousands cancel Netflix or Prime Video as UK cost of living crisis bites harder

Rise in energy prices seen as the 'catalyst' as nearly 800,000 UK households ended their subscriptions in April-June - but some streamers such as Disney Plus are still doing well

By Paul Speed, Online Reporter 12:18, 5 Aug 2022



Almost 800,000 of us in the UK have now cancelled our subscriptions to either **Netflix** or **Amazon Prime Video** - as the cost of living crisis continues to squeeze our cash.



Source: UKOM Ipsos iris Online Audience Measurement Service, selected Mobile Apps Jan and July 2022.

#### Audience to the NHS Covid-19 App: Jan-July

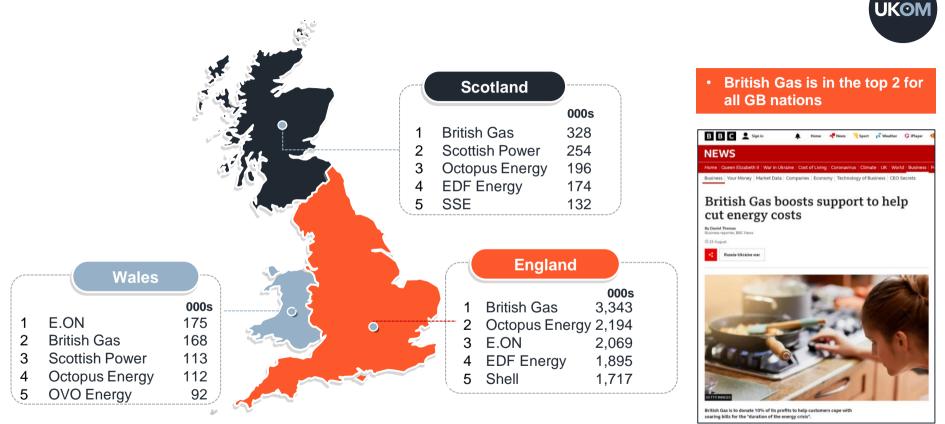




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Source: UKOM Ipsos iris Online Audience Measurement Service, Jan - July 2022

#### **Top 5 energy brands online by audience**

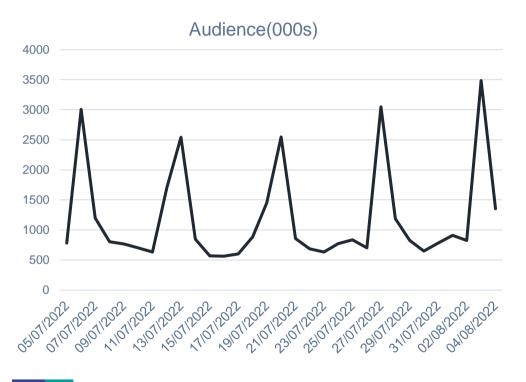




Source: UKOM Ipsos iris Online Audience Measurement Service, Ranking Report, July 2022

#### Weekly money saving tips from Martin Lewis drive audiences to Money Saving Expert





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Source: UKOM Ipsos iris Online Audience Measurement Service, July & August 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

• The money tips email and media appearances from Martin drive audience to the MSE site



#### 'Pre-loved' apps and sites like Vinted are growing in popularity



#### Vinted AUDIENCE (000S)

JAN '22	JUL '22	Change (%)	Change (abs)
4,122	5,245	27.2 %↑	1,123

Sün Money > Tips SUN SAVERS Which are the best apps to sell clothes? From Depop to Vinted declutter vour wardrobe and make £100s

DEAR DEIDRE TECH TRAVEL

MOTORS

PUZZLES

Suzanne Baum 23:57, 11 Jan 2022 | Updated: 10:31, 12 Jan 2022

< 1

HEALTH

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Source: UKOM Ipsos iris Online Audience Measurement Service, Jan & July 2022

# Top indexing fashion retailers\* among those who agree 'Celebrities influence my purchase decisions'



MEDIA	AUDIENCE (000s)	AUDIENCE AFFINITY INDEX	
Na-Kd	52	606	
Ohpolly	54	591	
Abercrombie	50	529	
Vestiaire Collective	56	378	
Surfdome	49	302	
Accessorize	58	299	
The North Face	49	289	
Urban Outfitters	121	287	
Isawitfirst	82	285	
Missguided	91	270	

 Fashion brands index highly for those who agree their purchases are influenced by celebrity

Support the Guardian Search jobs ⊕ Sign in C   Available for everyone, funded by readers Subscribe → Contribute →									
News	Opinion	Sport	Culture	Lifestyle	More~				
Film Music TV & radio Books Art & design Stage Games Classical									
Love Island	O This	article is more that	1 month old						
	dea	Love Island winner Ekin-Su signs £1m deal with fashion brand Oh Polly Deal reported to be biggest in show's history, as brand's sustainability claims called into question							
Lauren Cochra Fn 12 Aug 2022 15.37									
					11				
		Ekin-Su Cülcüloğlu and Davide Sanclimenti, the winners of this year's Love Island. Photograph: REX/Shutterstock							
	The L	The Love Island winner Ekin-Su Cülcüloğlu has signed a deal to work with							



Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

# **Questions?**

Find out more at: <u>http://www.ukom.uk.net/</u>

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Email us at: insights@ukom.uk.net

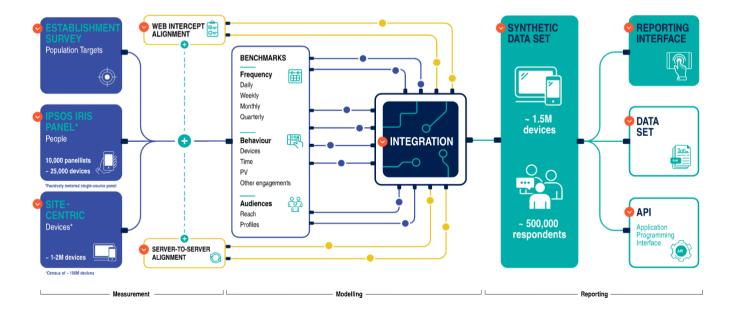
#### Methodology

#### A hybrid measurement solution combining a single-source panel with site-centric measurement

Ipsos iris is the new UKOM-endorsed service for the measurement of audiences of online content. It uses a hybrid methodology combining metered data from a core 10,000 single-source panel with census site-centric measurement. The diagram below summarises the inputs and processes involved in the production of Ipsos iris audience data.

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More detail on the methodology can be find at: https://ukom.uk.net/ipsos-iris-overview.php





### **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 lpsos iris 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 Ipsos 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/

### **About Ipsos**

Ipsos measure audiences of media content in more than 70 countries, and the company is at the forefront of the latest techniques and methodologies required to measure more platforms, more quickly.

In the UK, Ipsos have developed the world's first large scale, single source, multiplatform, passive measurement panel and work across the industry with partners such as: BARB, RAJAR, PAMCo, IPA Touchpoints, and Route.

In 2021, Ipsos iris, became UKOM's approved solution for online audience measurement data. The solution is built for the needs of the industry and allows clients to: reassert their value proposition, have greater differentiation, enable ROI for clients, and give you a trusted independent foundation to make evidence-based decisions for their digital growth.



#### Find out more at:

https://iris.ipsos.com/what-we-offer/