

**UKOM**

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**Digital Market  
Overview**

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**July 2022**



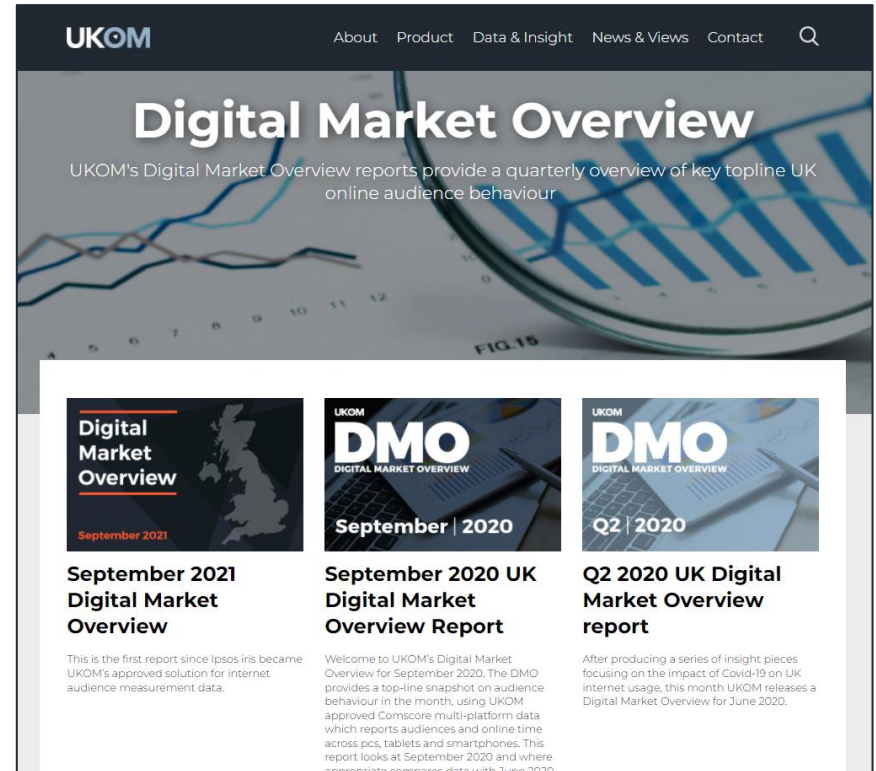
# The UK Digital Market Overview July 2022



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.



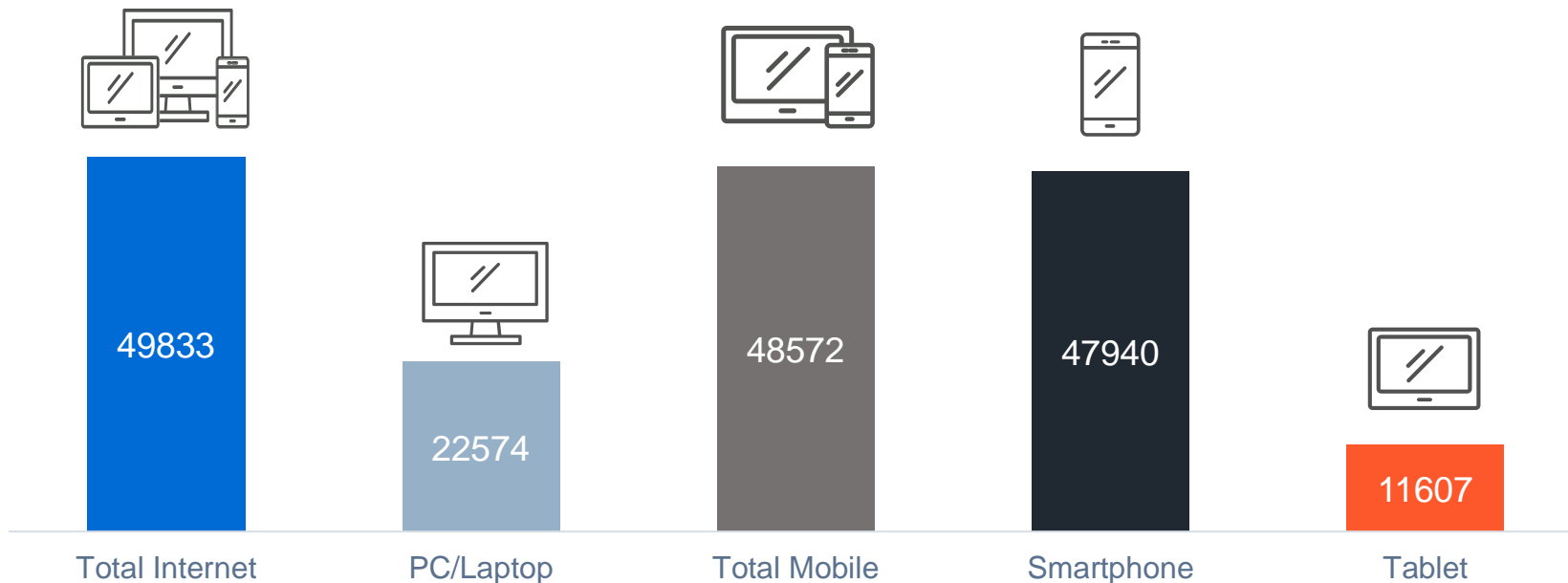
# Audience by device

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# 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

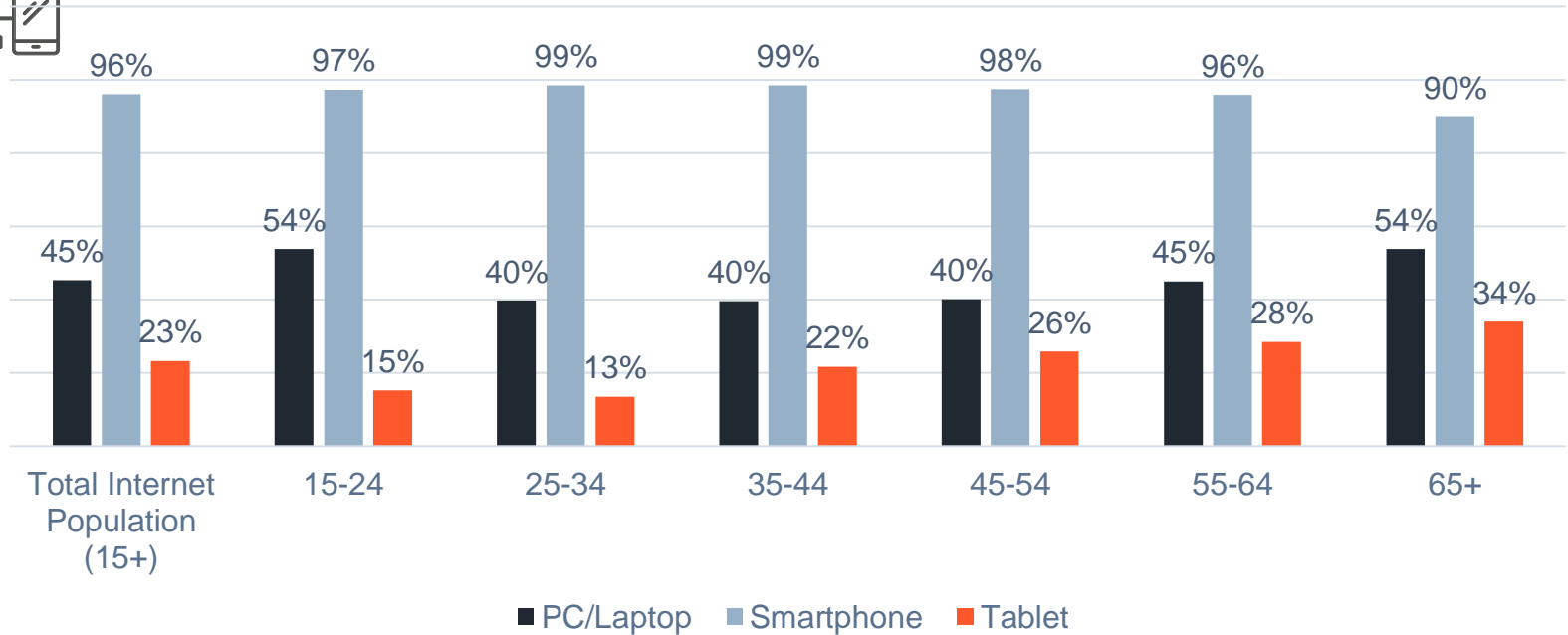
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

# Device split by age

Reach of tablets increases with increasing age



Device reach by Online audience (%)



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

# Time online

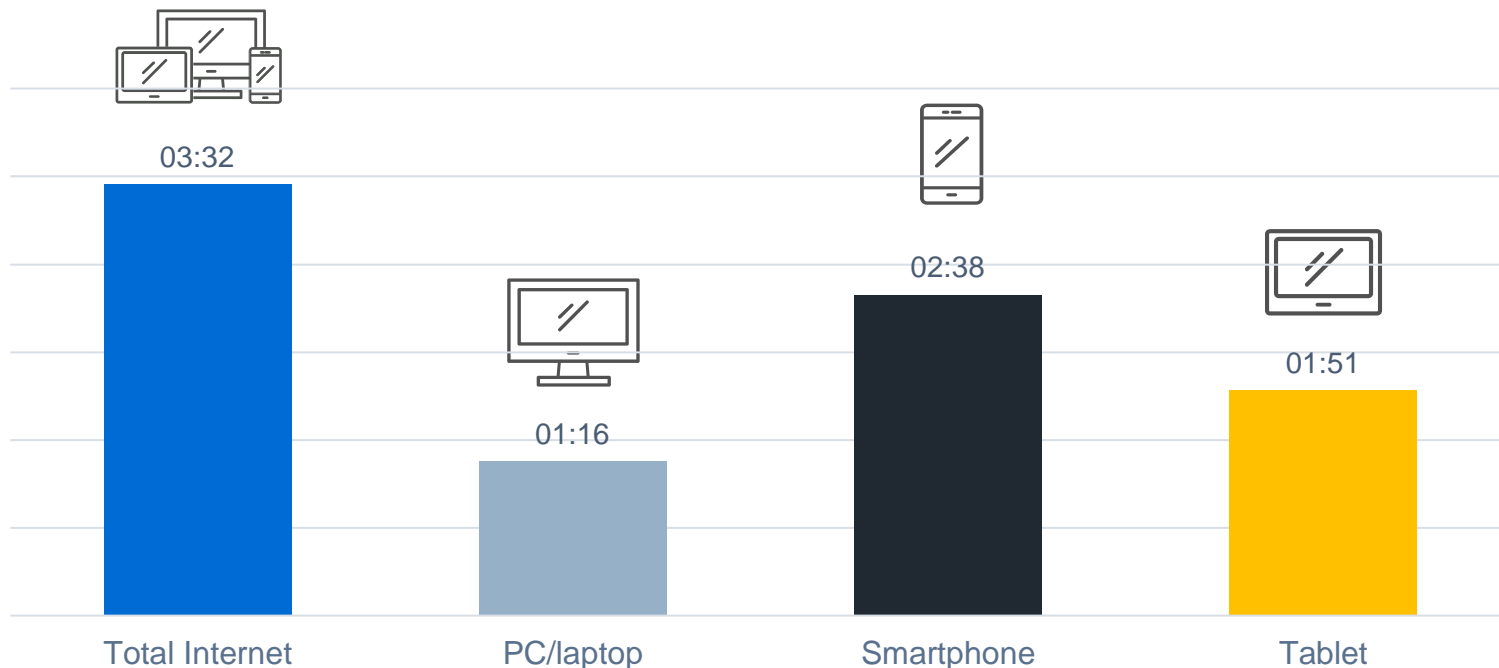
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# Average time spent online per day by device (hh:mm)



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



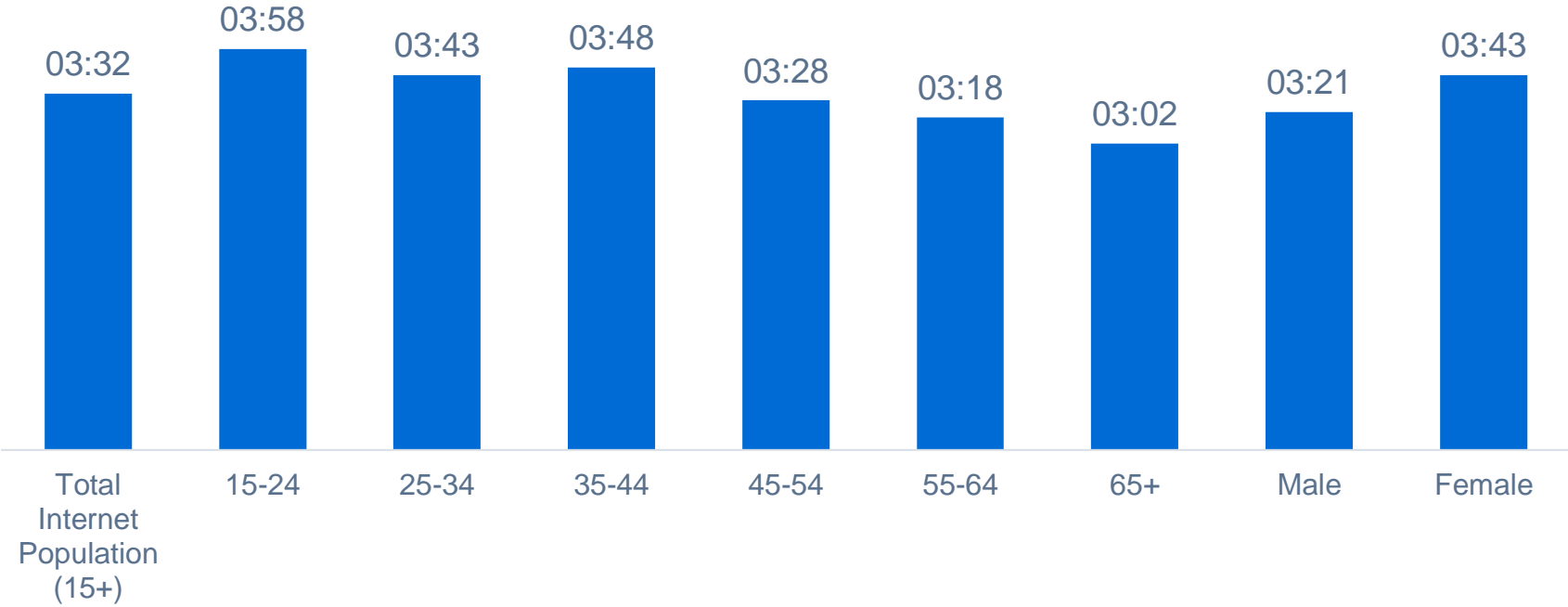
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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



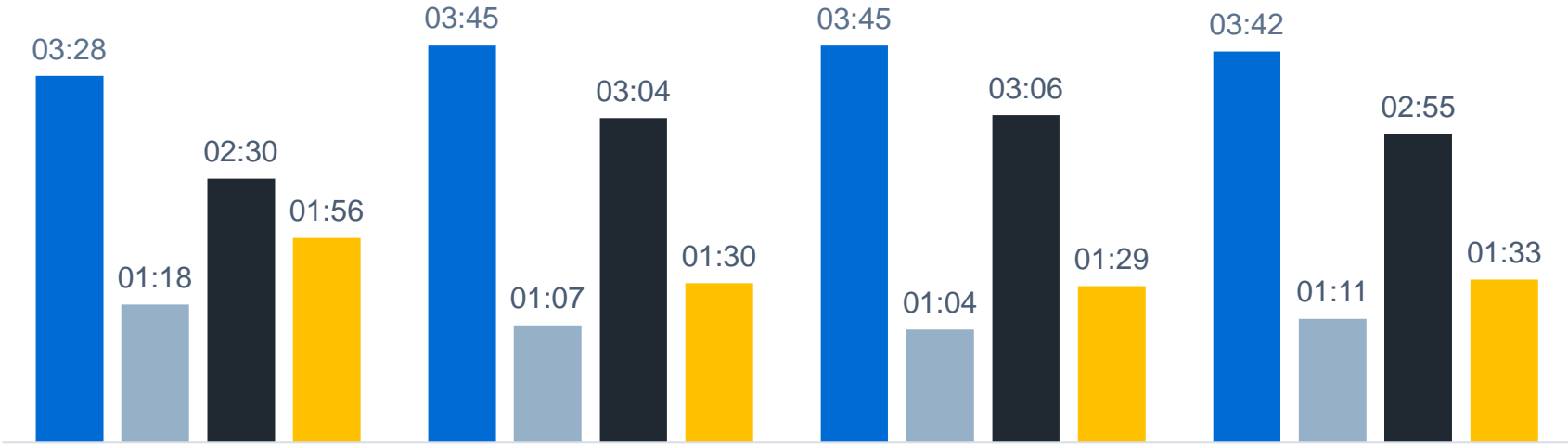
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



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



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



No Children 0-14 in HH      Presence of Children 0-5, and children 6-14 in HH      Presence of Children 0-5, no children 6-14 in HH      Presence of Children 6-14, no children 0-5 in HH

■ Total Internet   ■ PC/laptop   ■ Smartphone   ■ Tablet

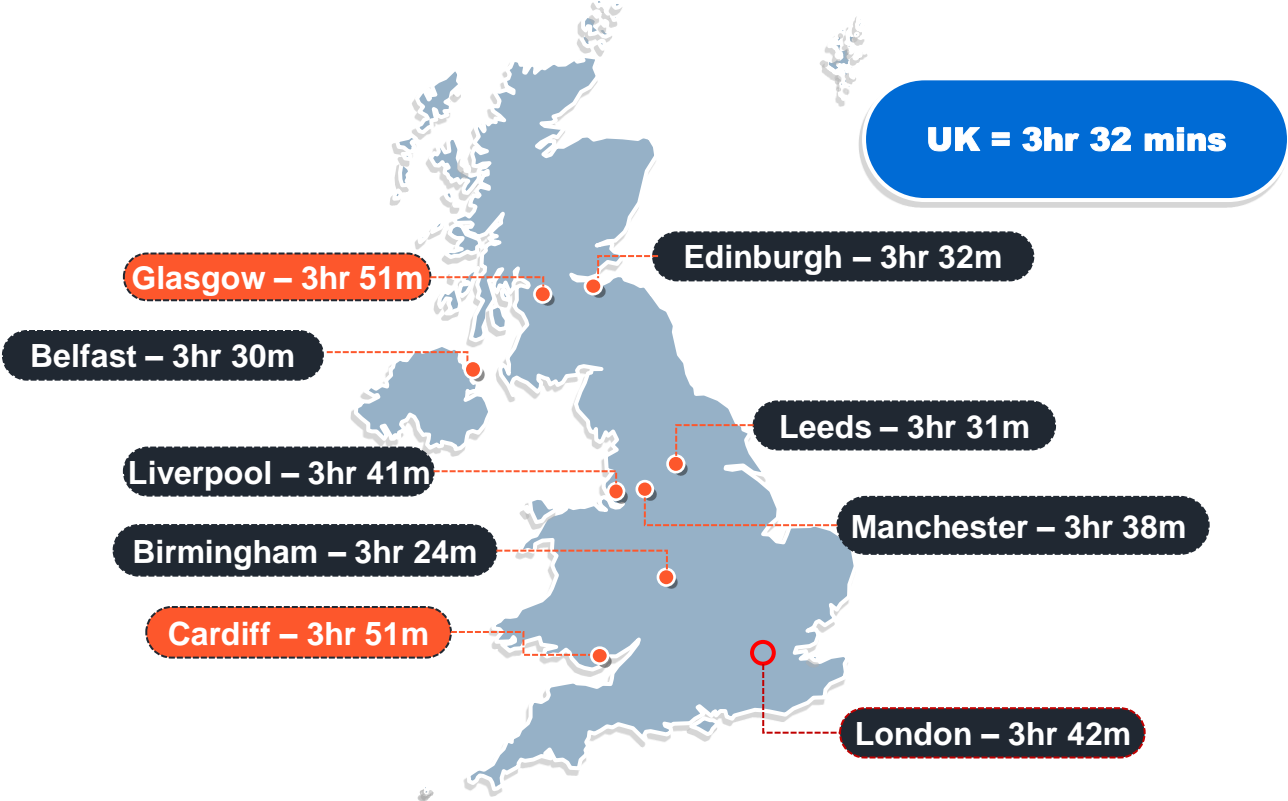


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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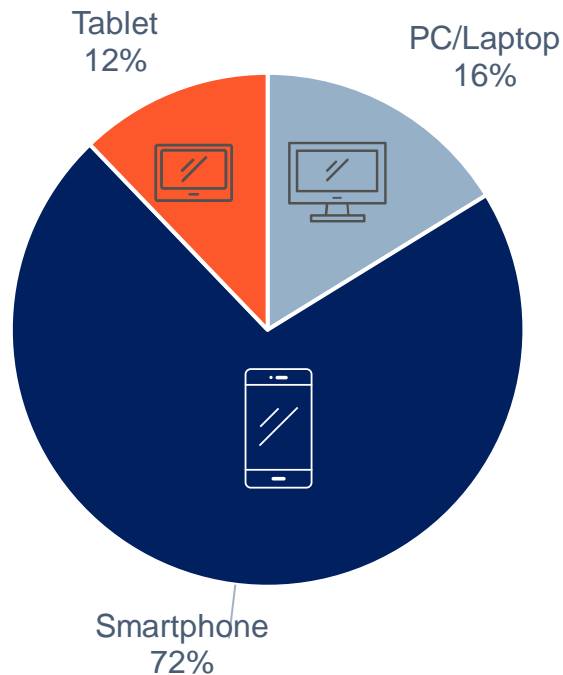
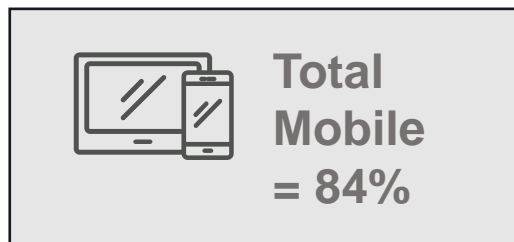
# Average time online per day by city (hh:mm)

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



# Share of minutes by device

Smartphones account for 72% of time online



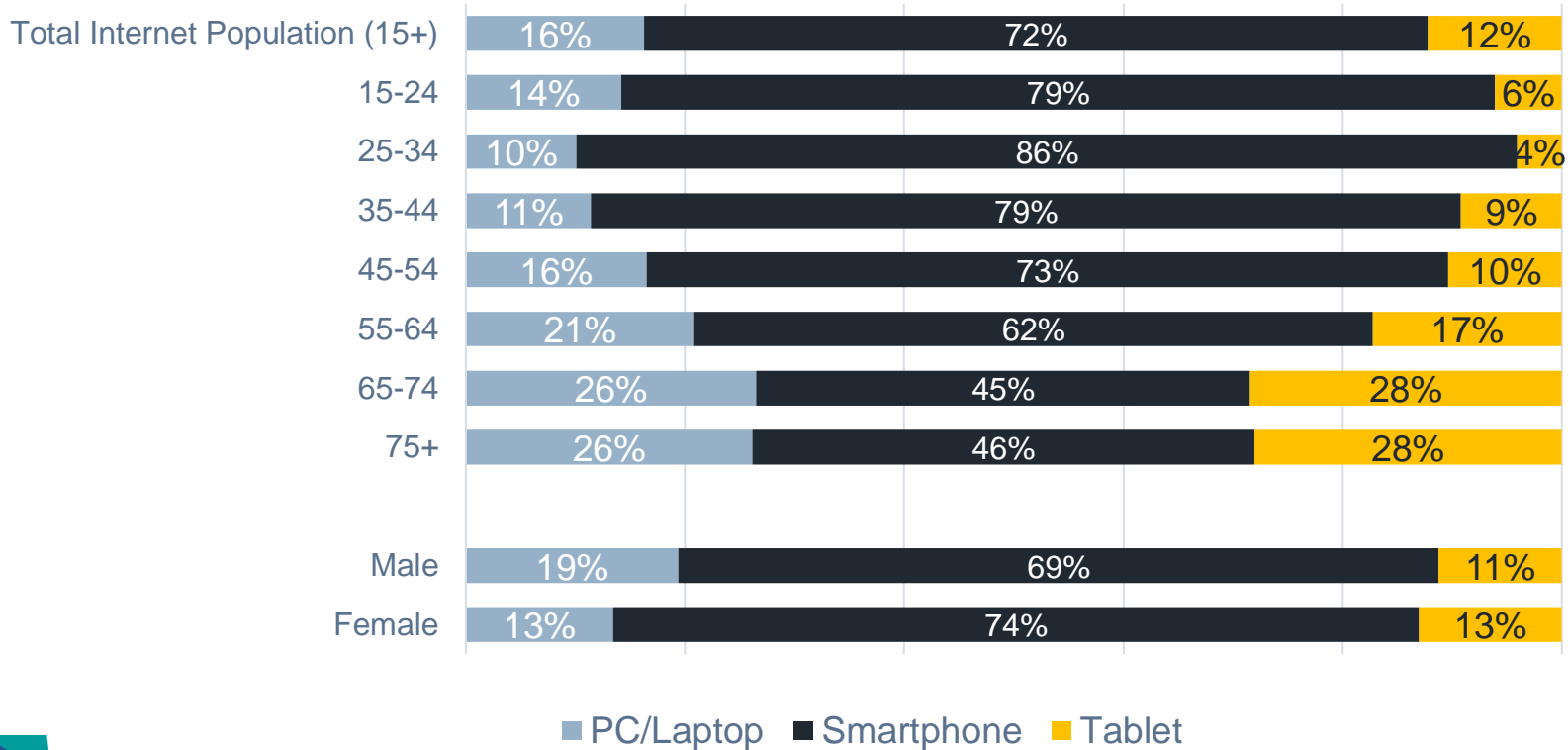
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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

# Device share of minutes by age and gender



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



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

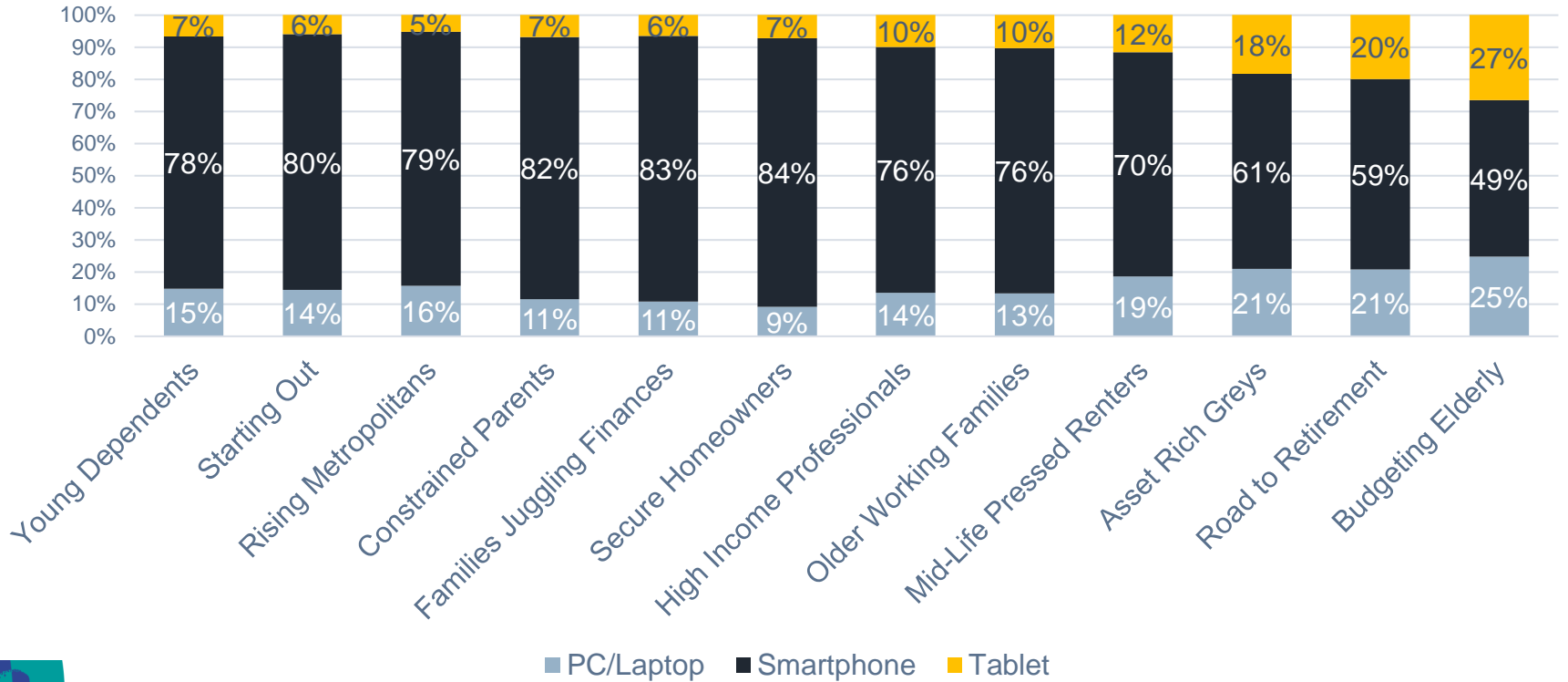
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



# Device share of minutes by Fresco segment



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



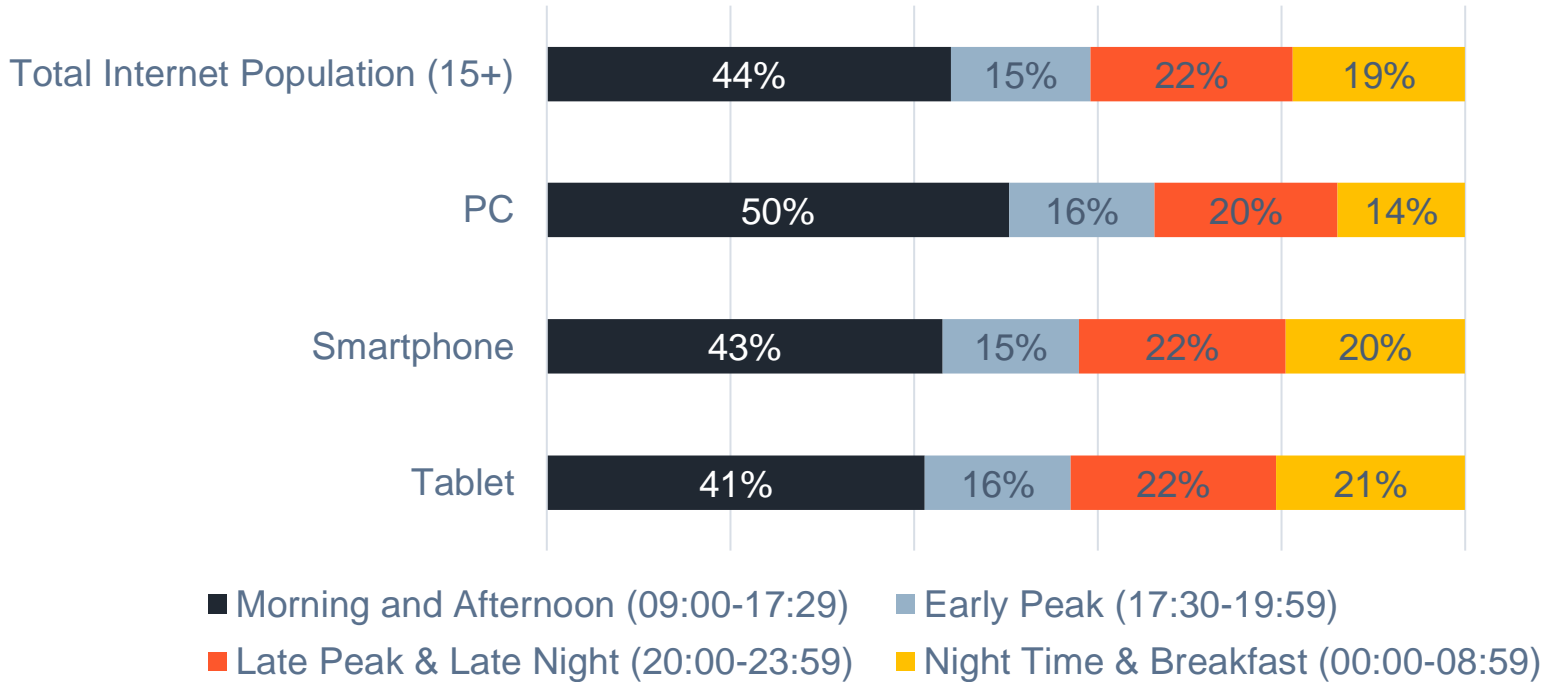
Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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

# Daypart share of minutes by device



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

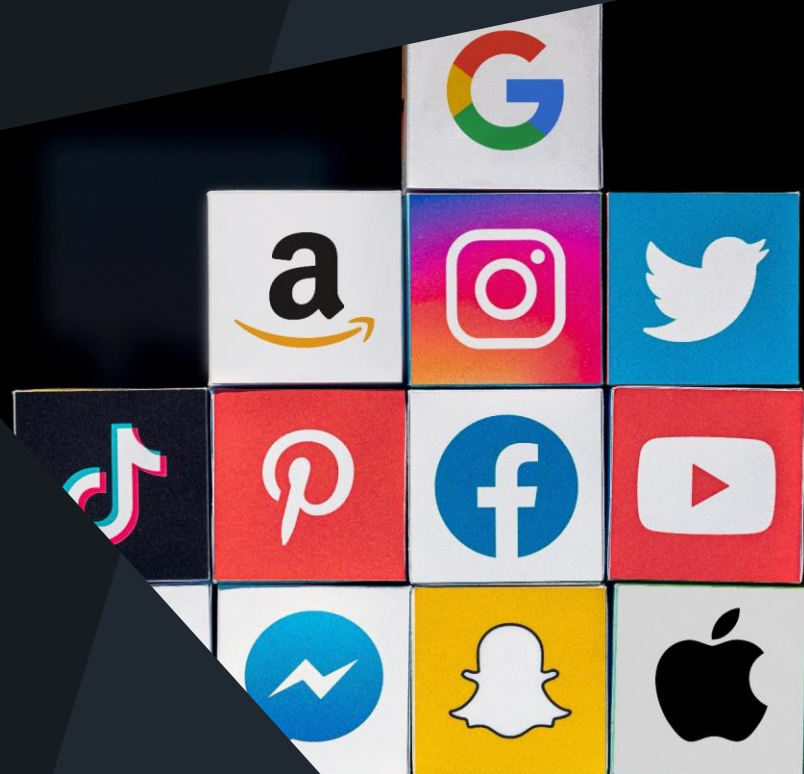


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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

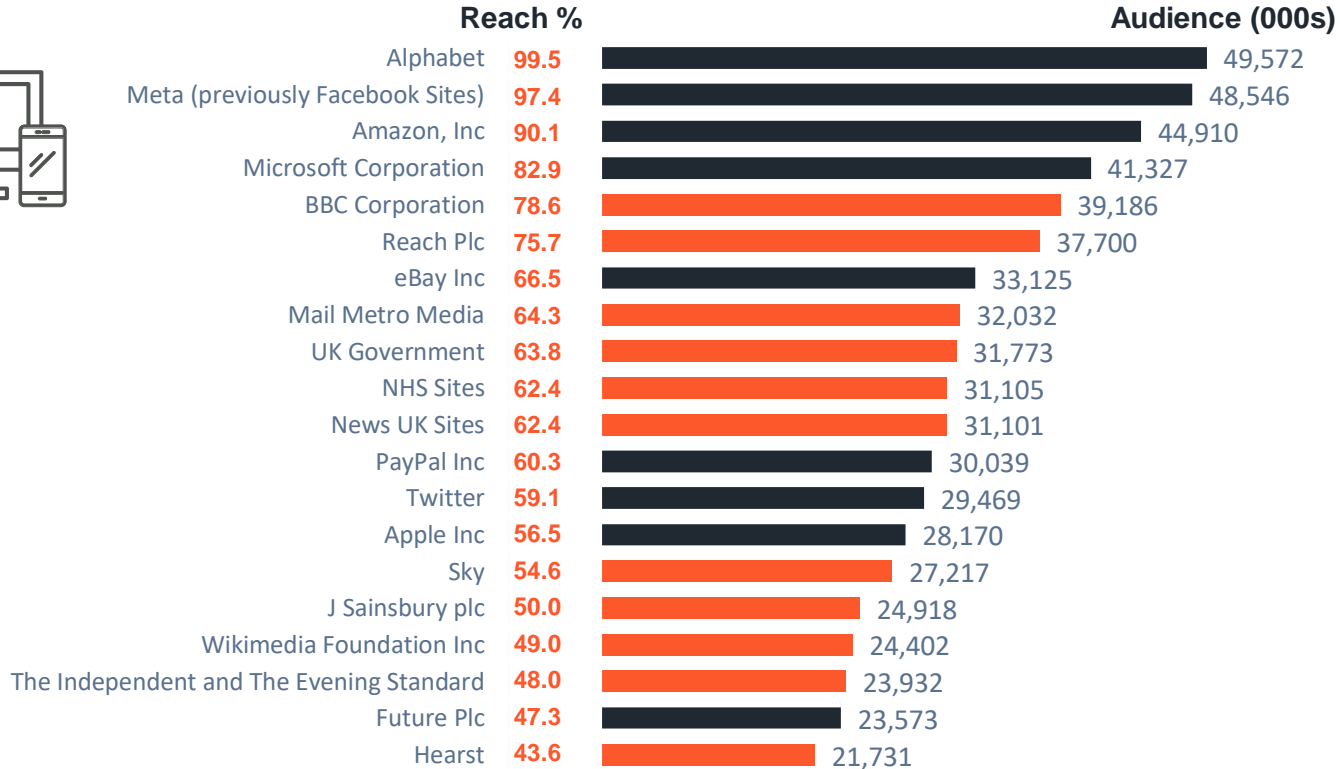
# Top organisations and brands

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# Top 20 organisations by audience

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



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

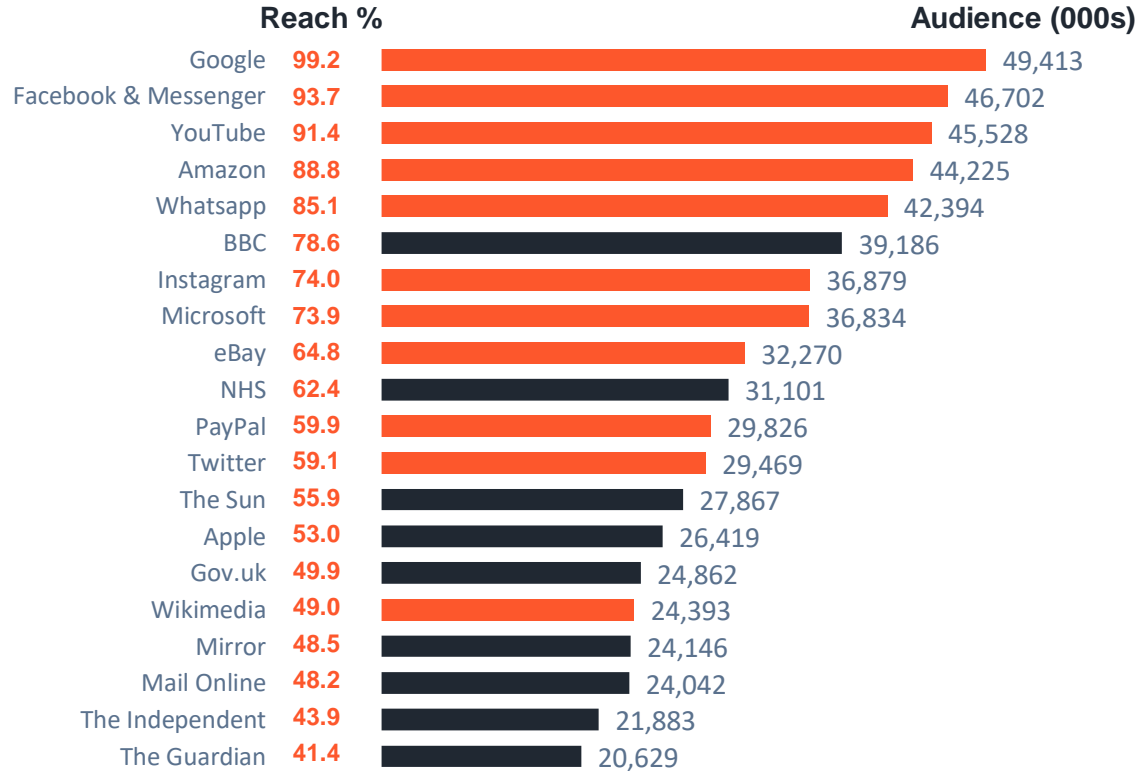
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# Top 20 online brands by audience

US global brands dominate the top 10



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



# Top 10 organisations 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 (%)
1	Google	49,413	99.2
2	Facebook & Messenger	46,702	93.7
3	YouTube	45,528	91.4
4	Amazon	44,225	88.8
5	Whatsapp	42,394	85.1
6	BBC	39,186	78.6
7	Instagram	36,879	74.0
8	Microsoft	36,834	73.9
9	eBay	32,270	64.8
10	NHS	31,101	62.4

	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

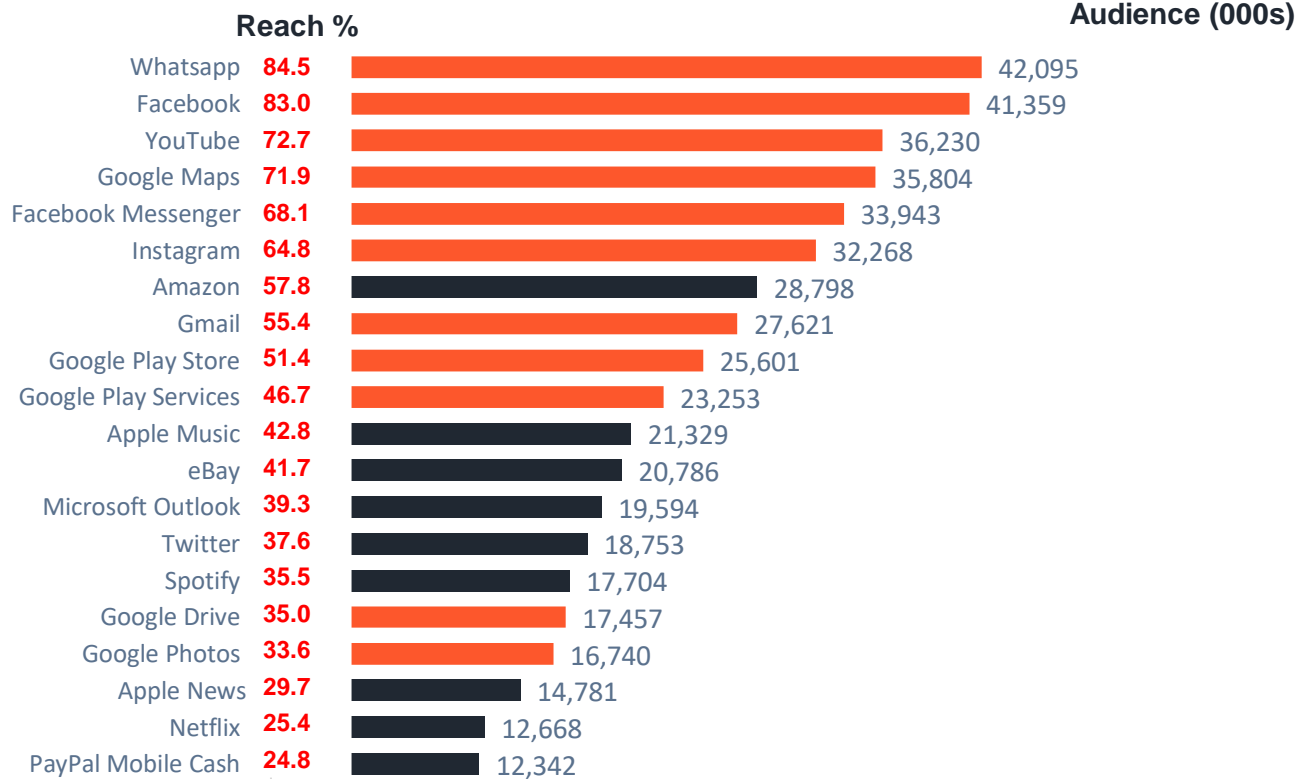
# Top mobile apps

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# Top 20 mobile apps by audience

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



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



# 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



## Tablet Top 10

	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

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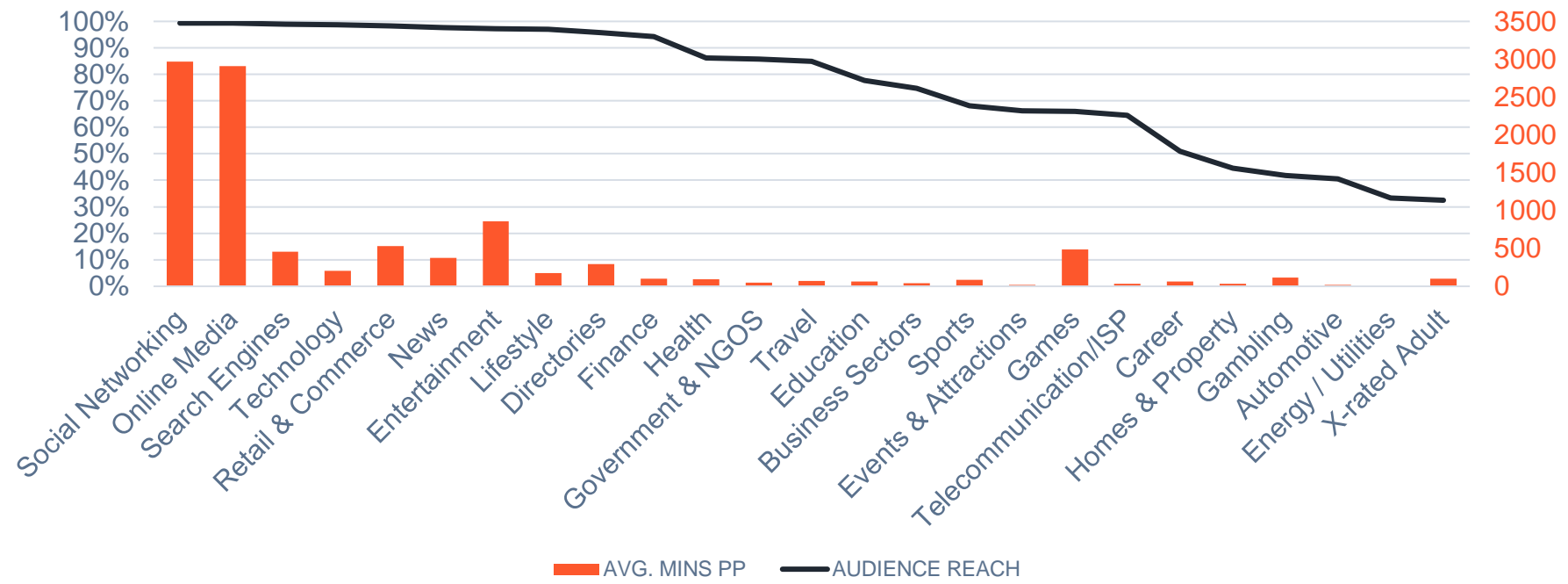
# Reach & avg. mins pp by tier 1 category – July 22



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

Reach

Ave mins

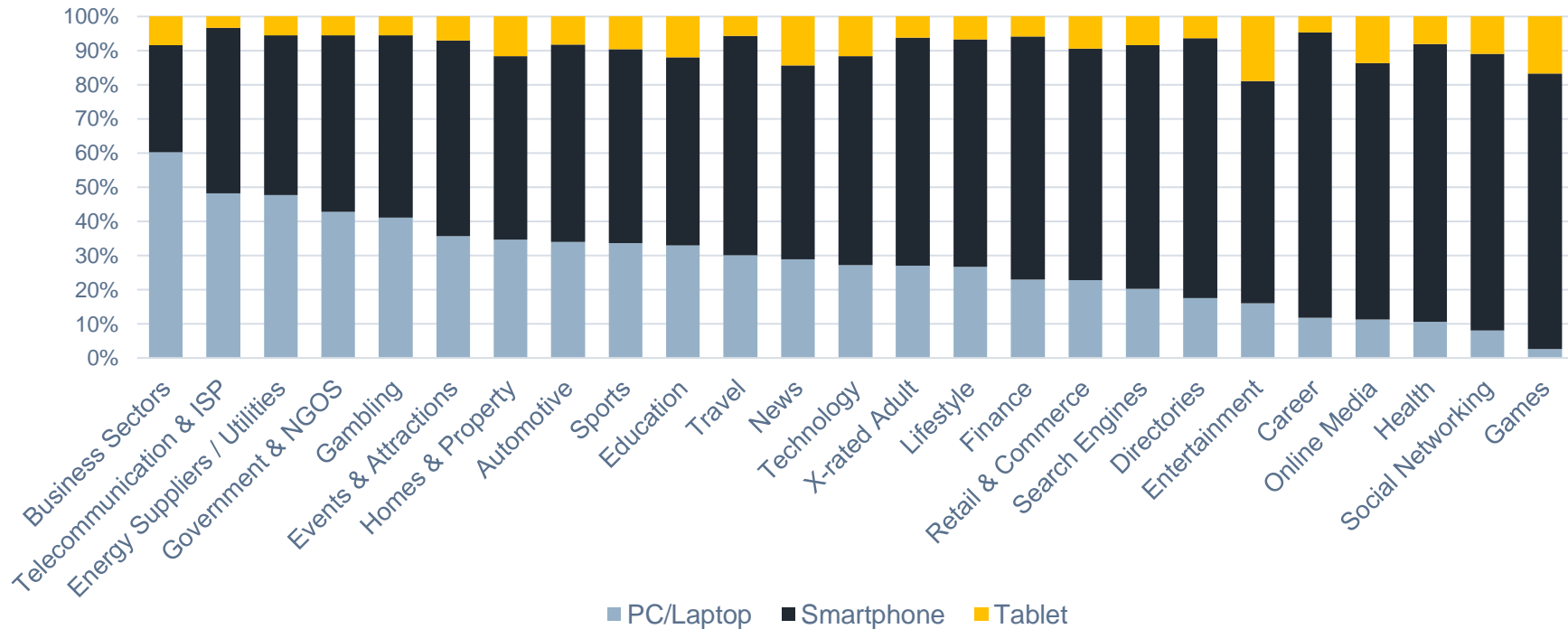


Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022  
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.  
 NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

# Share of minutes by device by tier 1 category



Content type significantly influences choice of device.



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

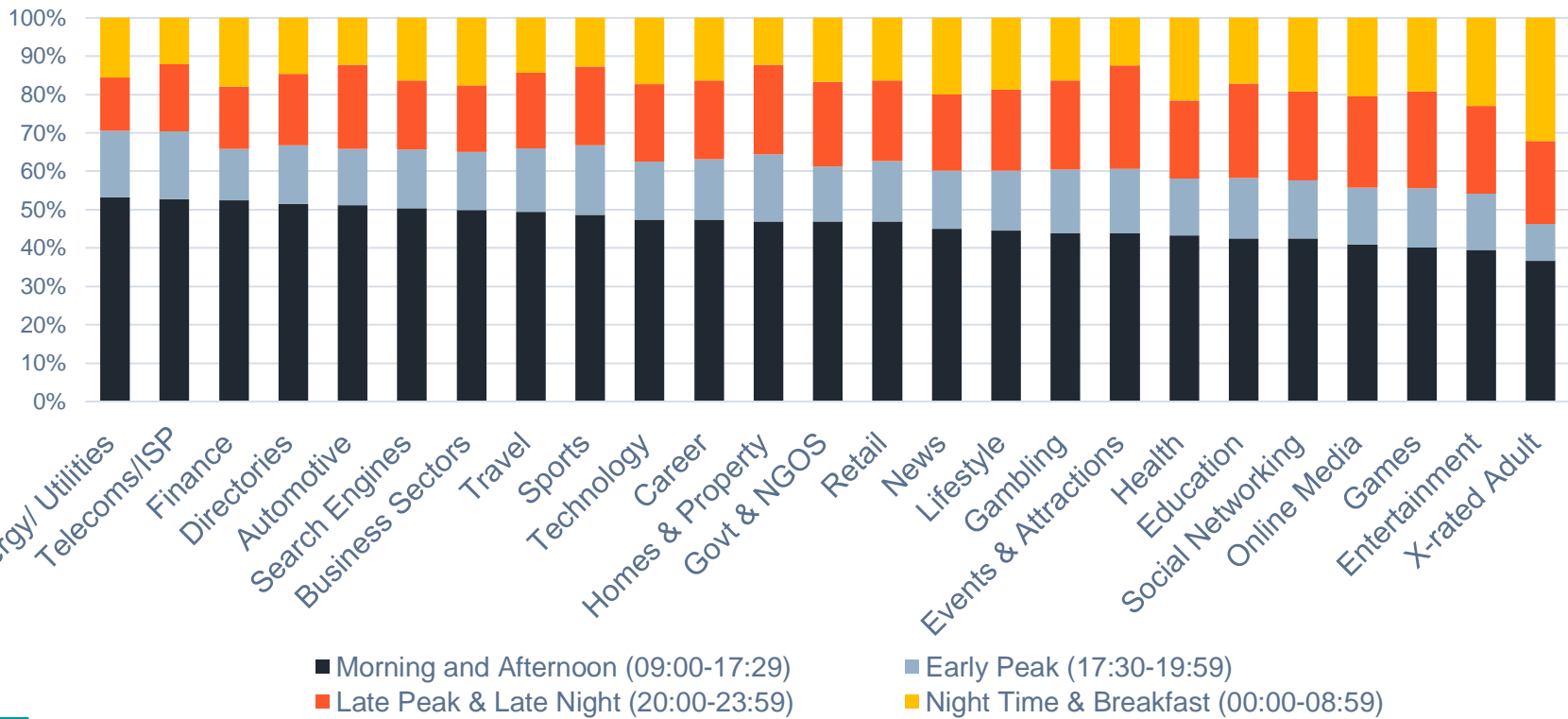
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NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

# 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

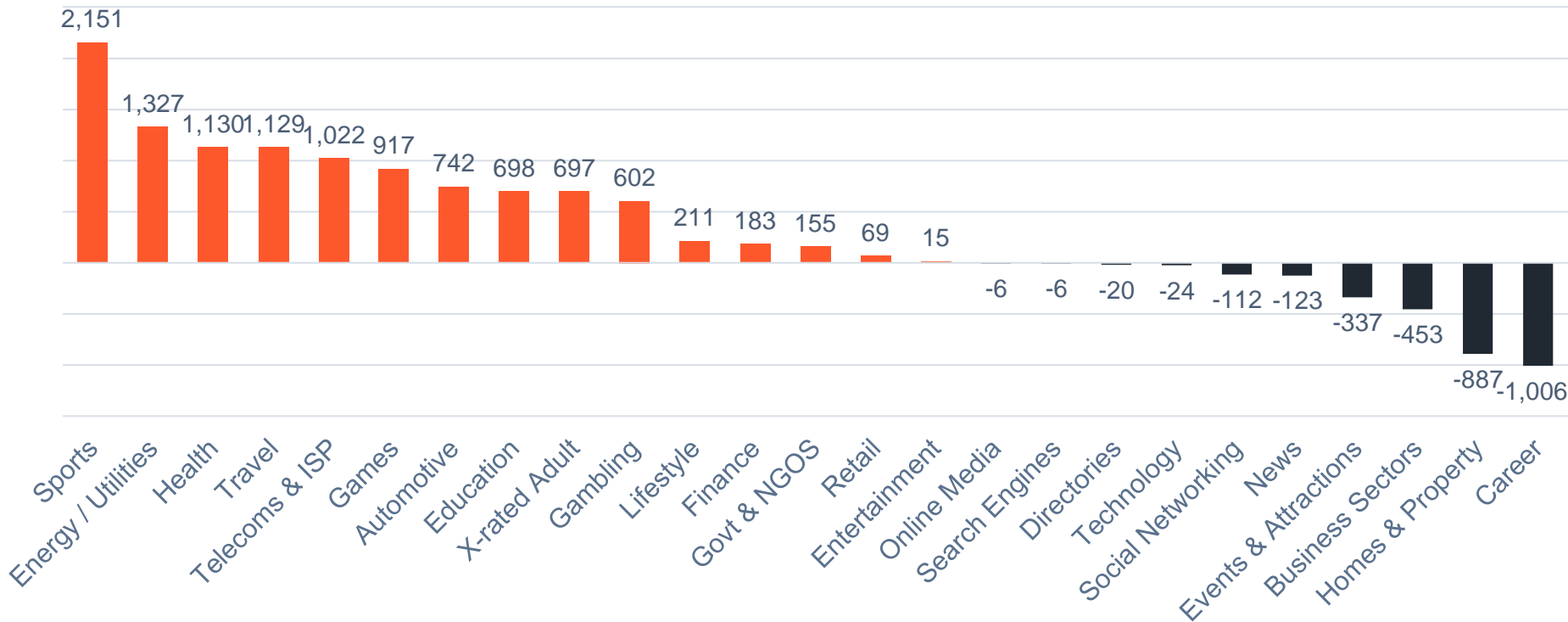
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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



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

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



# In the News

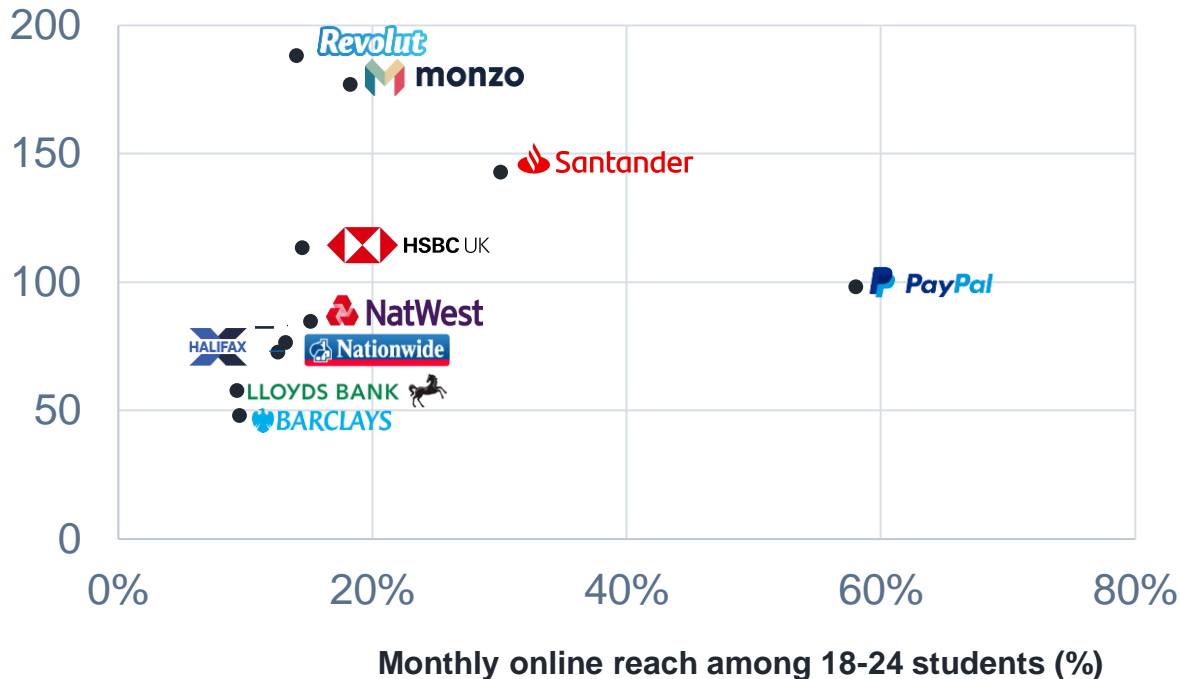
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# Top banking brands by online reach among students aged 18-24 in full-time education



## Audience Affinity Index



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

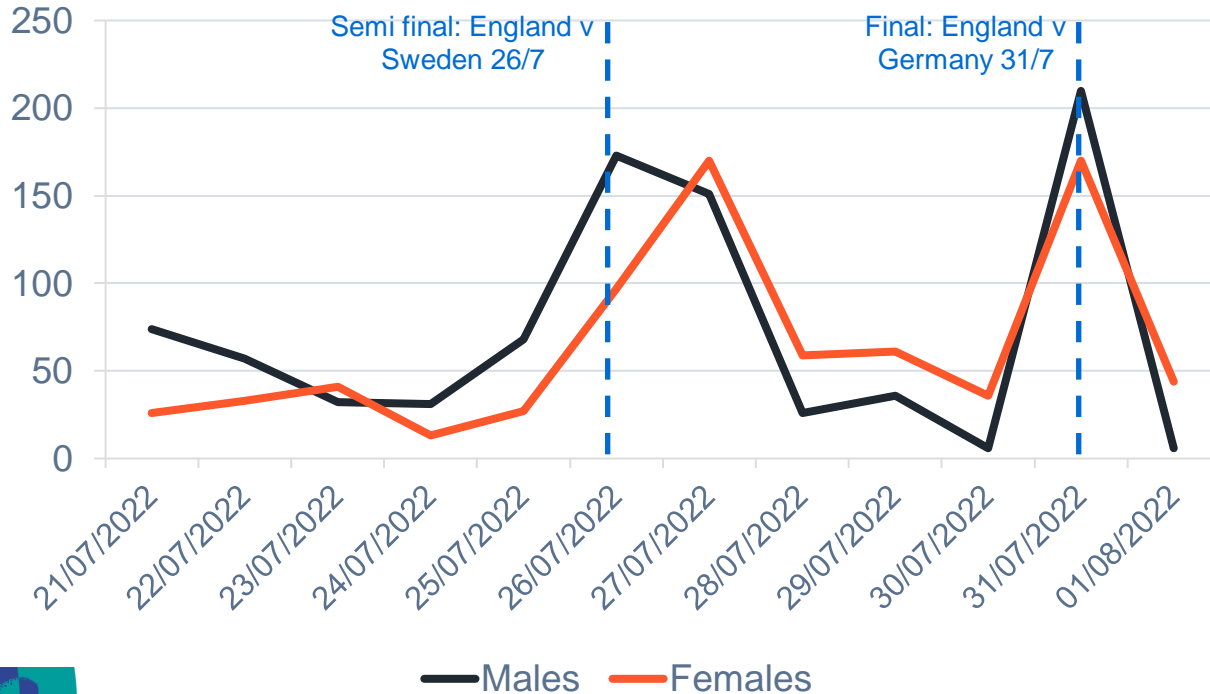


Source: UKOM Ipsos iris Online Audience Measurement Service, Ranking Report June 2022. Students = Full-time Education. Category = T2 Finance: Banking & Loans

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



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



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



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

# Audience to SVOD mobile apps between January and July



	AUDIENCE (000S)			
	JAN '22	JUL '22	Change (%)	Change (abs)
<b>SVOD Mobile Apps</b>	<b>20,992</b>	<b>20,093</b>	<b>-4.3 %↓</b>	<b>-899</b>
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 %↑	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.

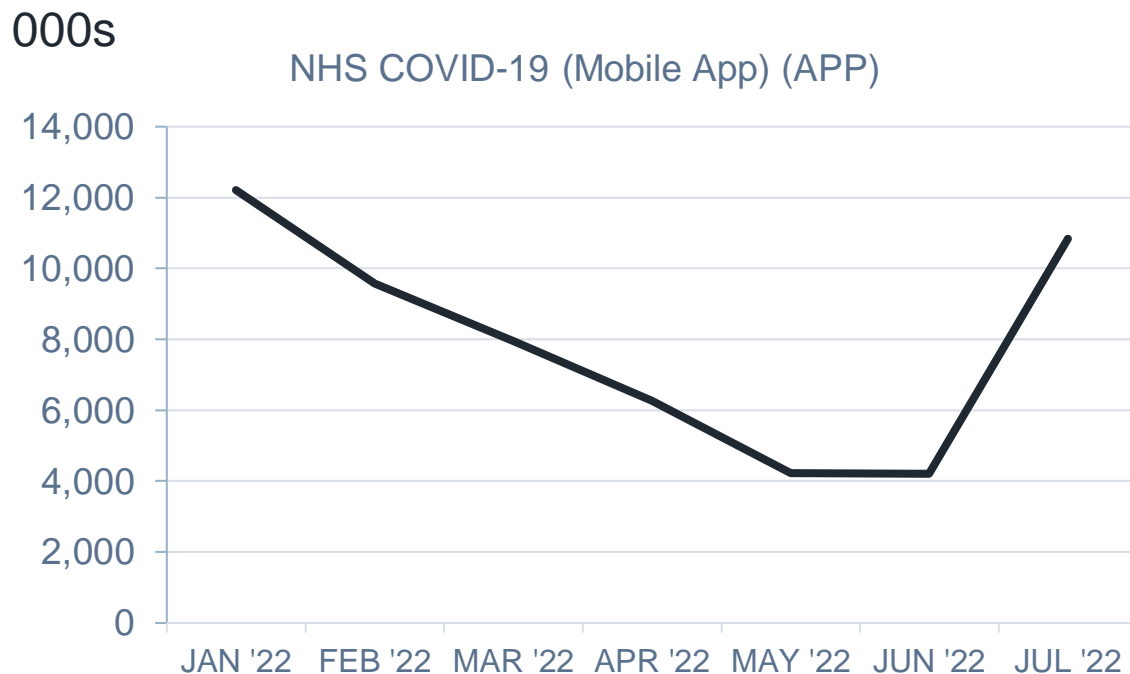


Source: UKOM Ipsos iris Online Audience Measurement Service, selected Mobile Apps Jan and July 2022.

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



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



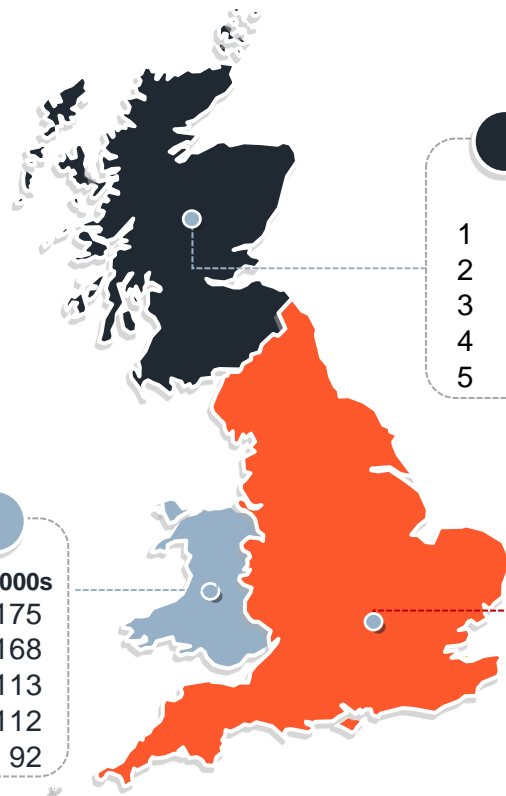
• As cases rose in July, visitors to the NHS Covid-19 app increased.



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

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

# Top 5 energy brands online by audience



## Scotland

000s

1	British Gas	328
2	Scottish Power	254
3	Octopus Energy	196
4	EDF Energy	174
5	SSE	132

## Wales

000s

1	E.ON	175
2	British Gas	168
3	Scottish Power	113
4	Octopus Energy	112
5	OVO Energy	92

## England

000s

1	British Gas	3,343
2	Octopus Energy	2,194
3	E.ON	2,069
4	EDF Energy	1,895
5	Shell	1,717

• British Gas is in the top 2 for all GB nations



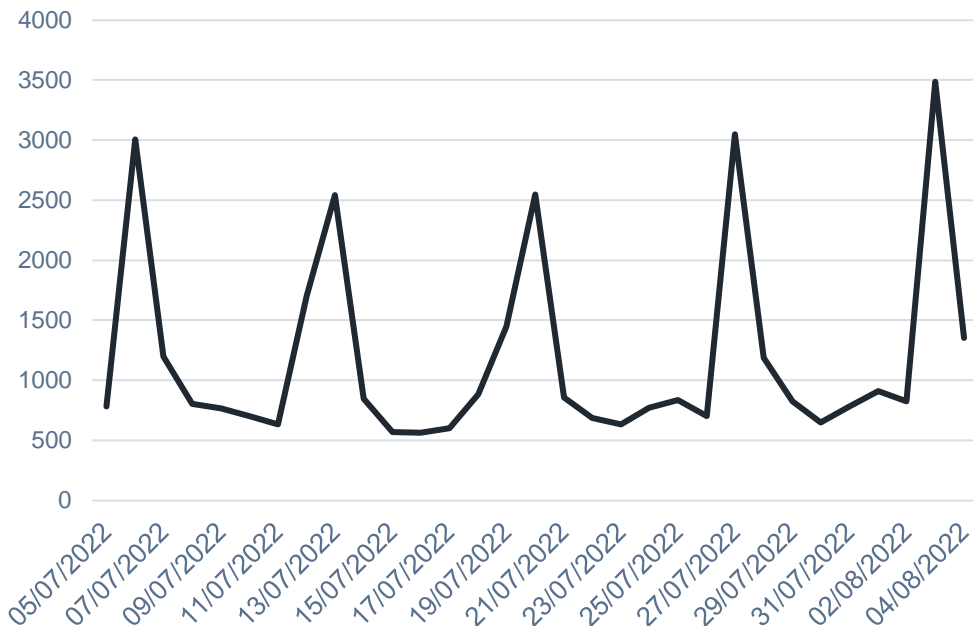
Source: UKOM Ipsos iris Online Audience Measurement Service, Ranking Report, July 2022

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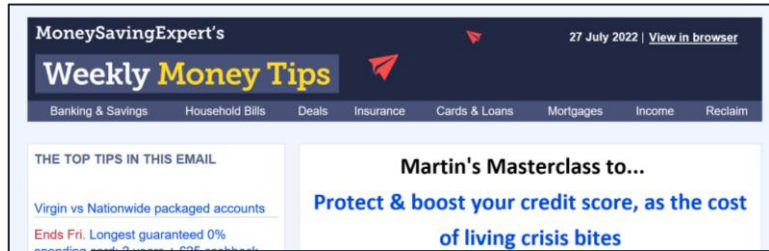
# Weekly money saving tips from Martin Lewis drive audiences to Money Saving Expert



Audience(000s)



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



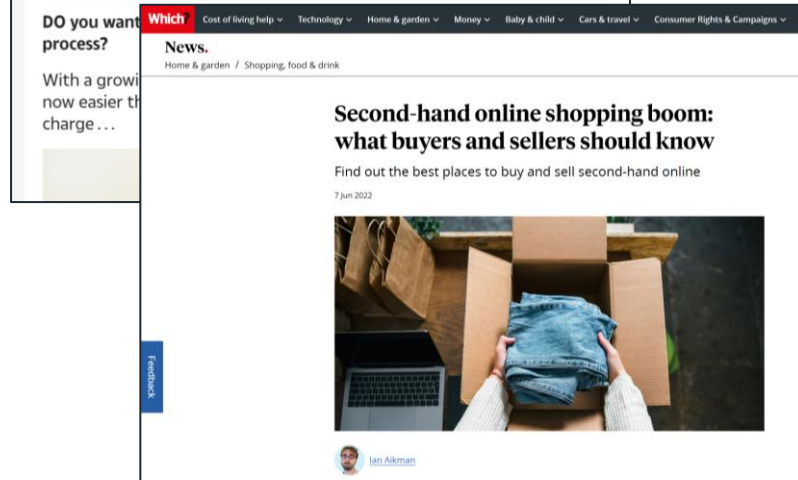
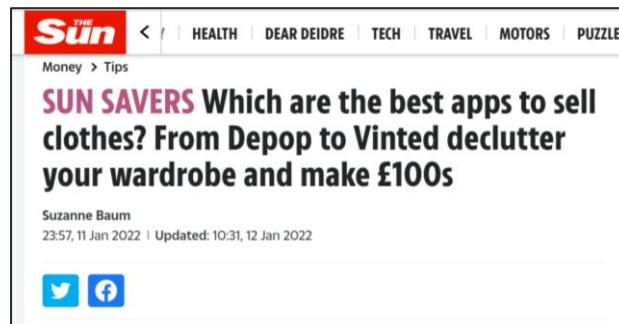
Source: UKOM Ipsos iris Online Audience Measurement Service, July & August 2022  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

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



# Vinted

Vinted AUDIENCE (000S)			
JAN '22	JUL '22	Change (%)	Change (abs)
4,122	5,245	27.2 %↑	1,123



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

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

# 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



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 \* Based on top 50 fashion retailer brands by audience



# Questions?

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Find out more at:

<http://www.ukom.uk.net/>

Email us at:

[insights@ukom.uk.net](mailto:insights@ukom.uk.net)

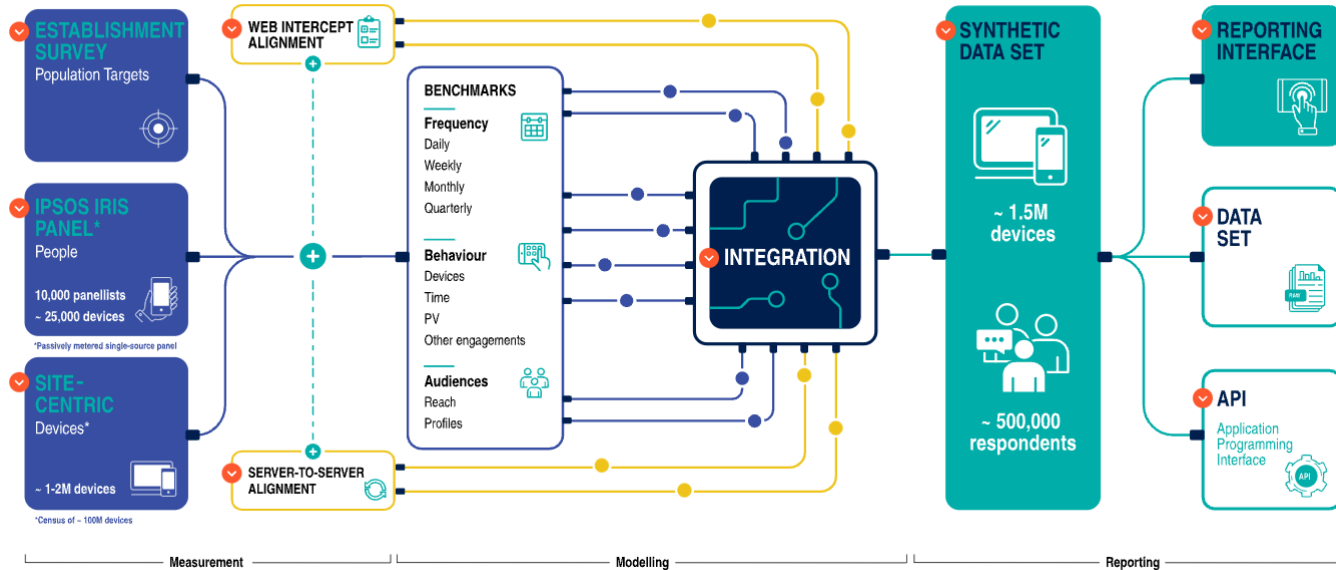
# Methodology



## 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.

More detail on the methodology can be found 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 Ipsos 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/](http://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, multi-platform, 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/>