

UKOM

**Digital Market
Overview**

Sept 2022



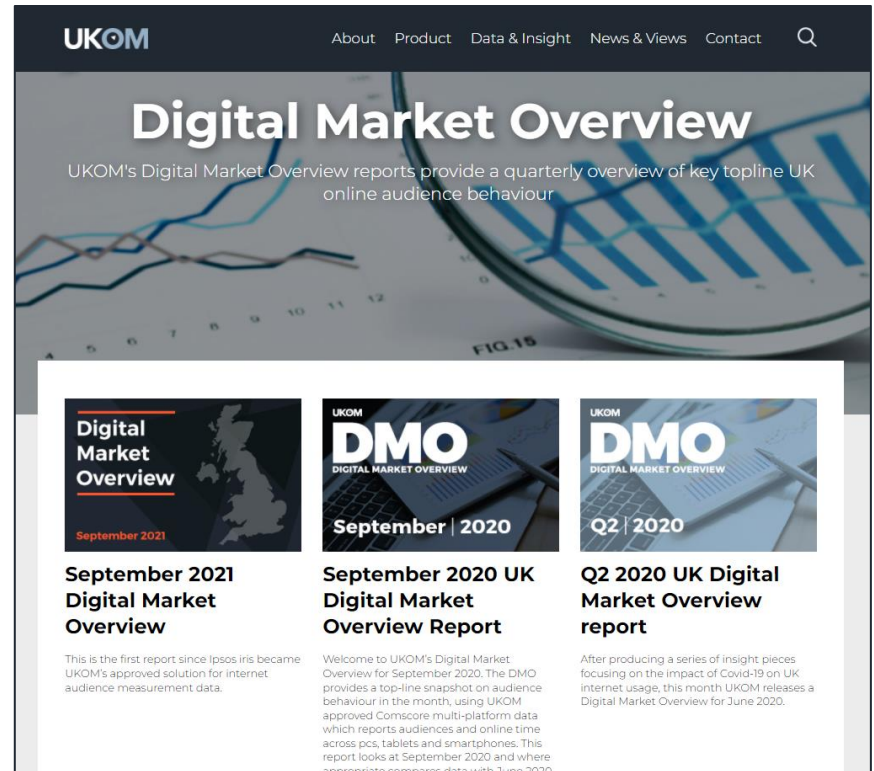
The UK Digital Market Overview Sept 2022



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

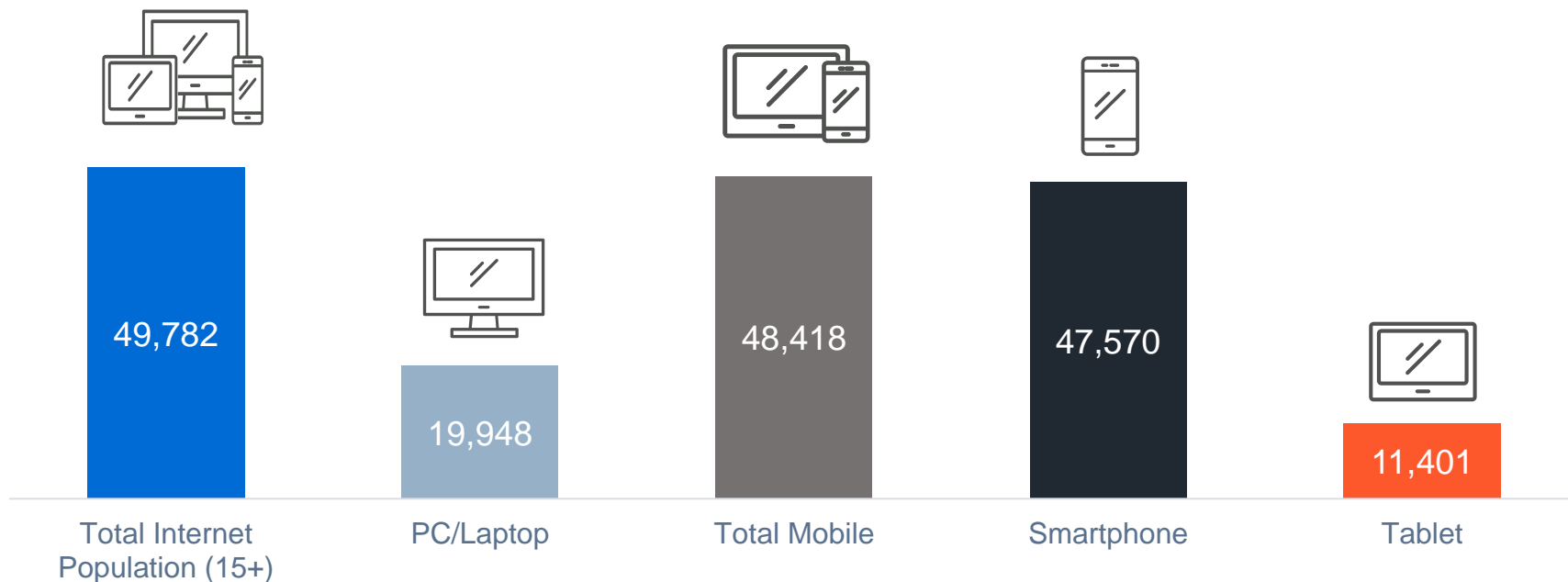


Audience by device



Online audience by device (000s)

More than twice as many people use smartphones than computers



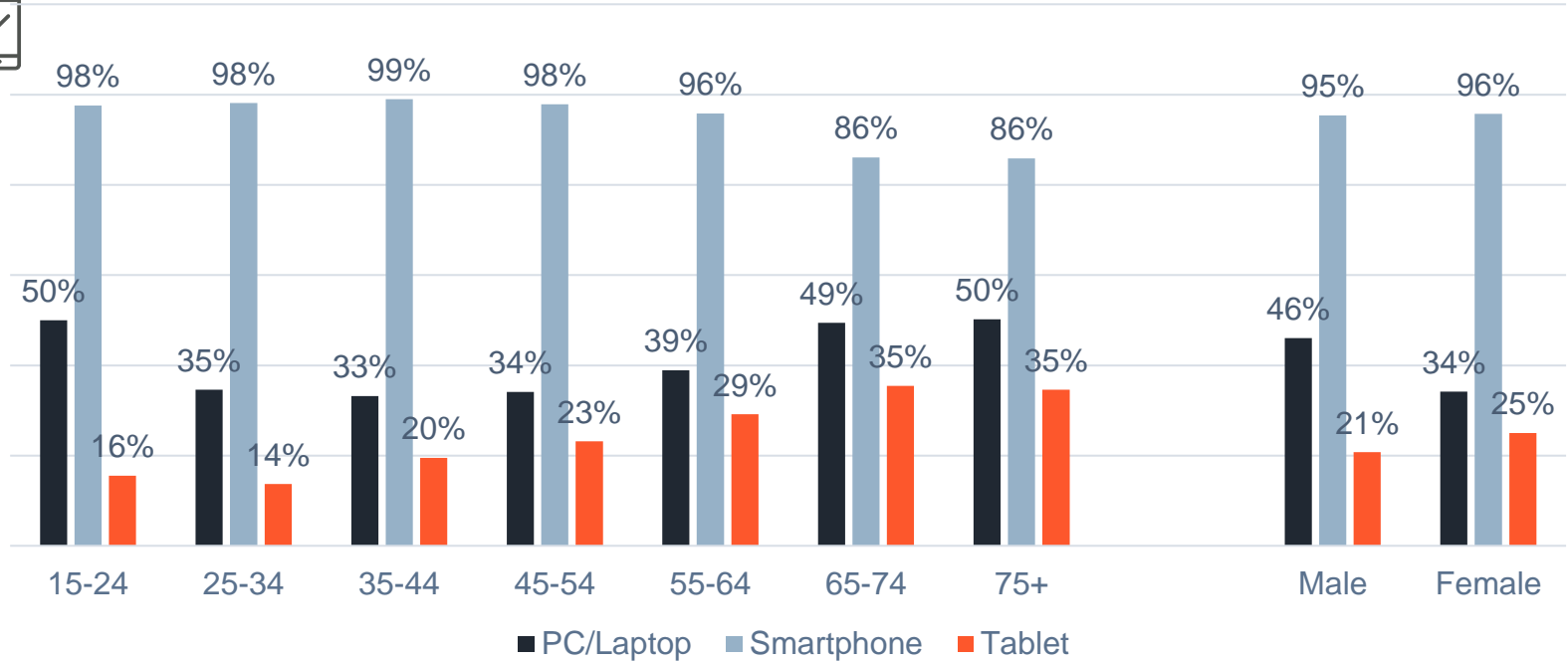
Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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

Device reach by age and gender (%)



Reach of tablets increases with increasing age. Males are more likely to use a PC than females



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

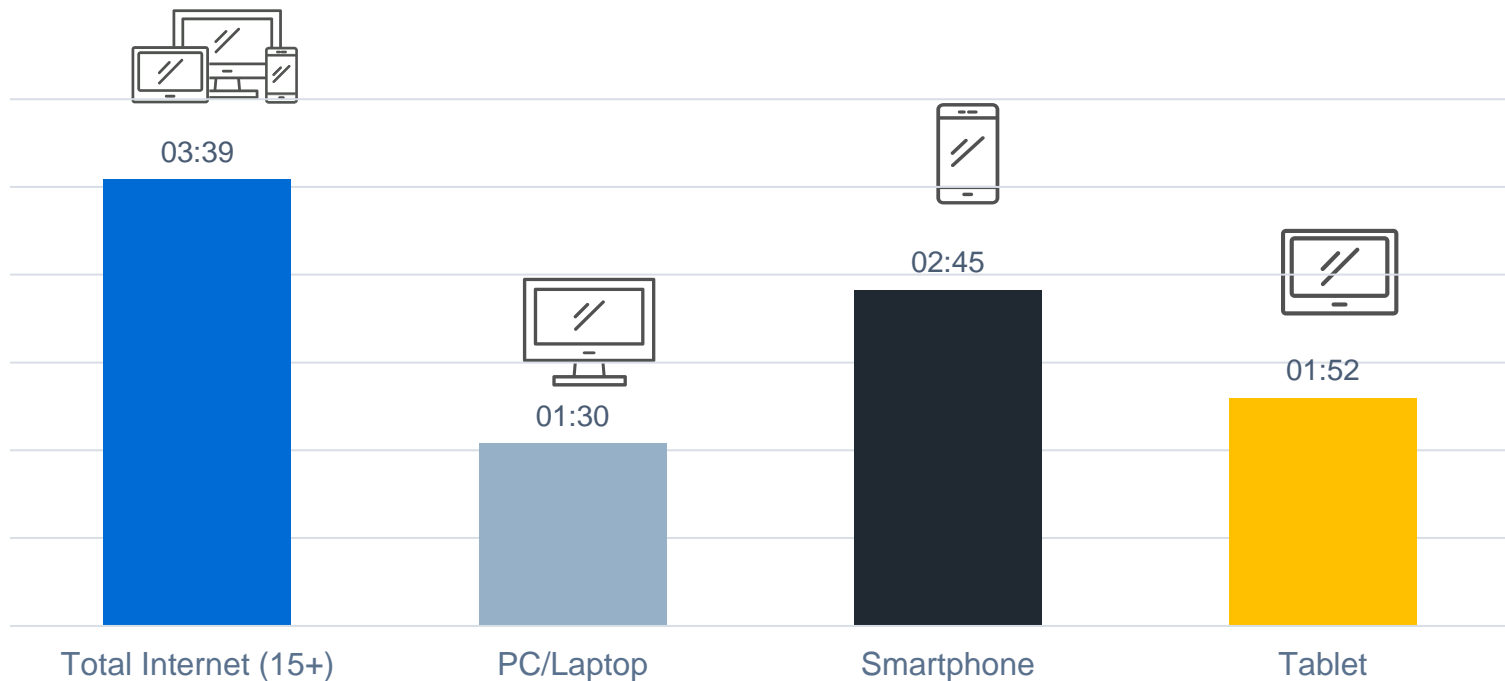
Time online



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



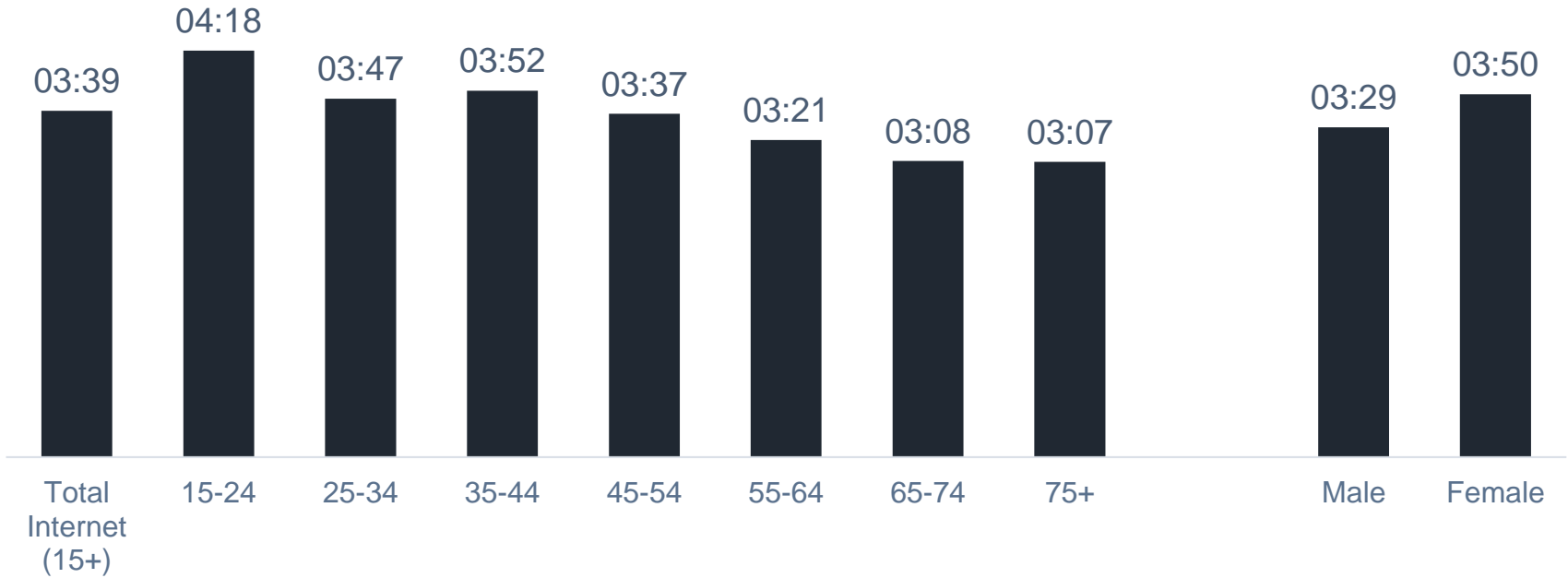
Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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

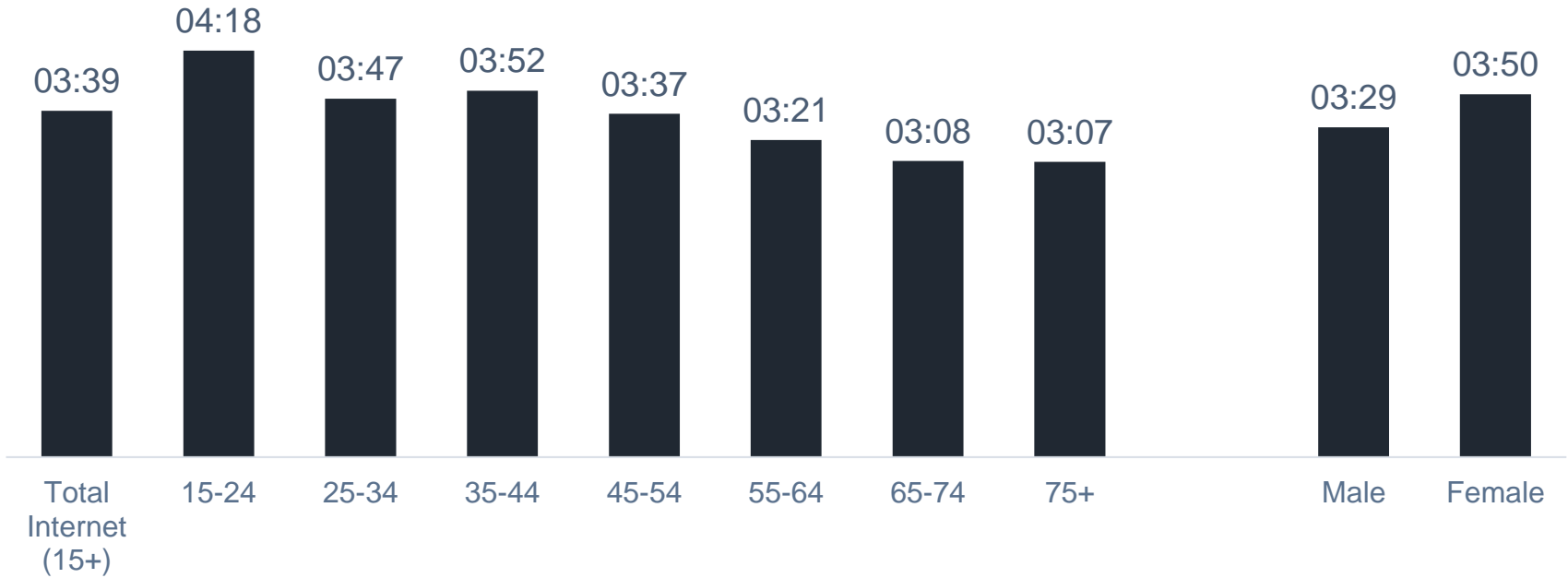


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Average time online per day - age & gender (hh:mm)



Younger audiences and females spend most time online

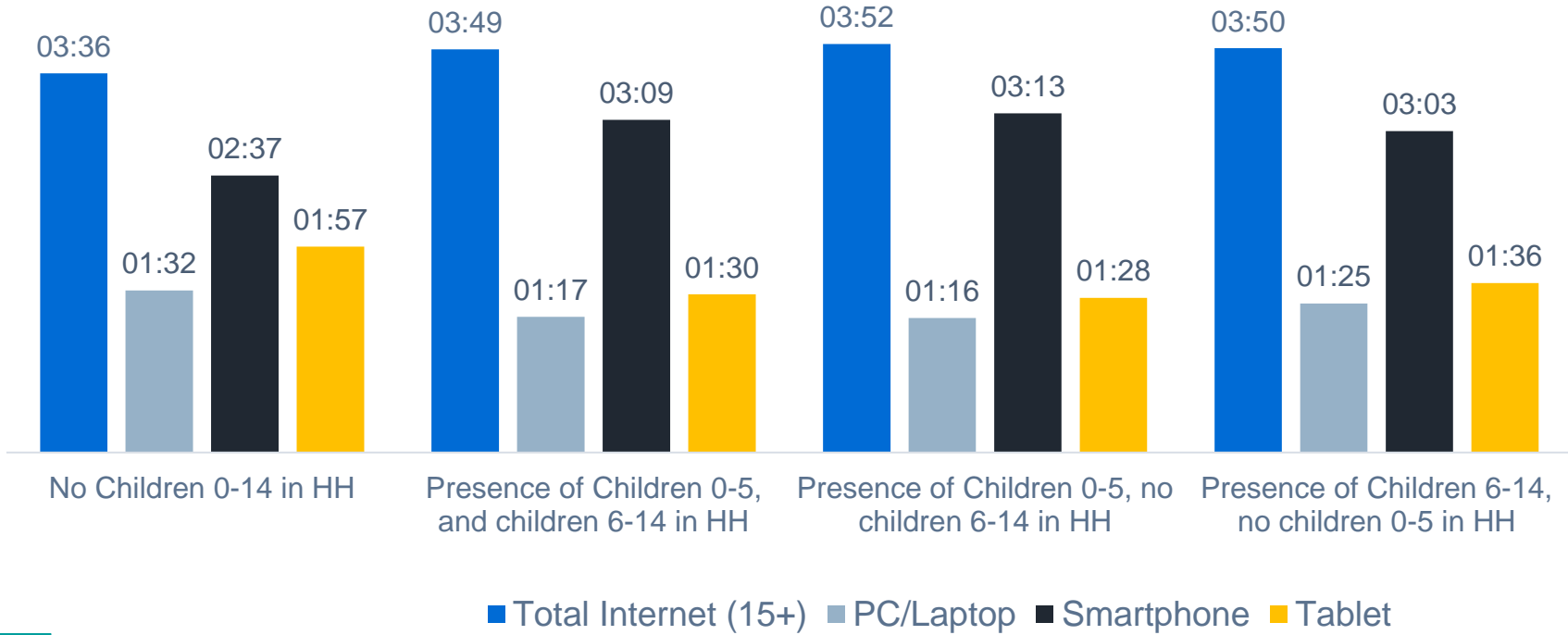


Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

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



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

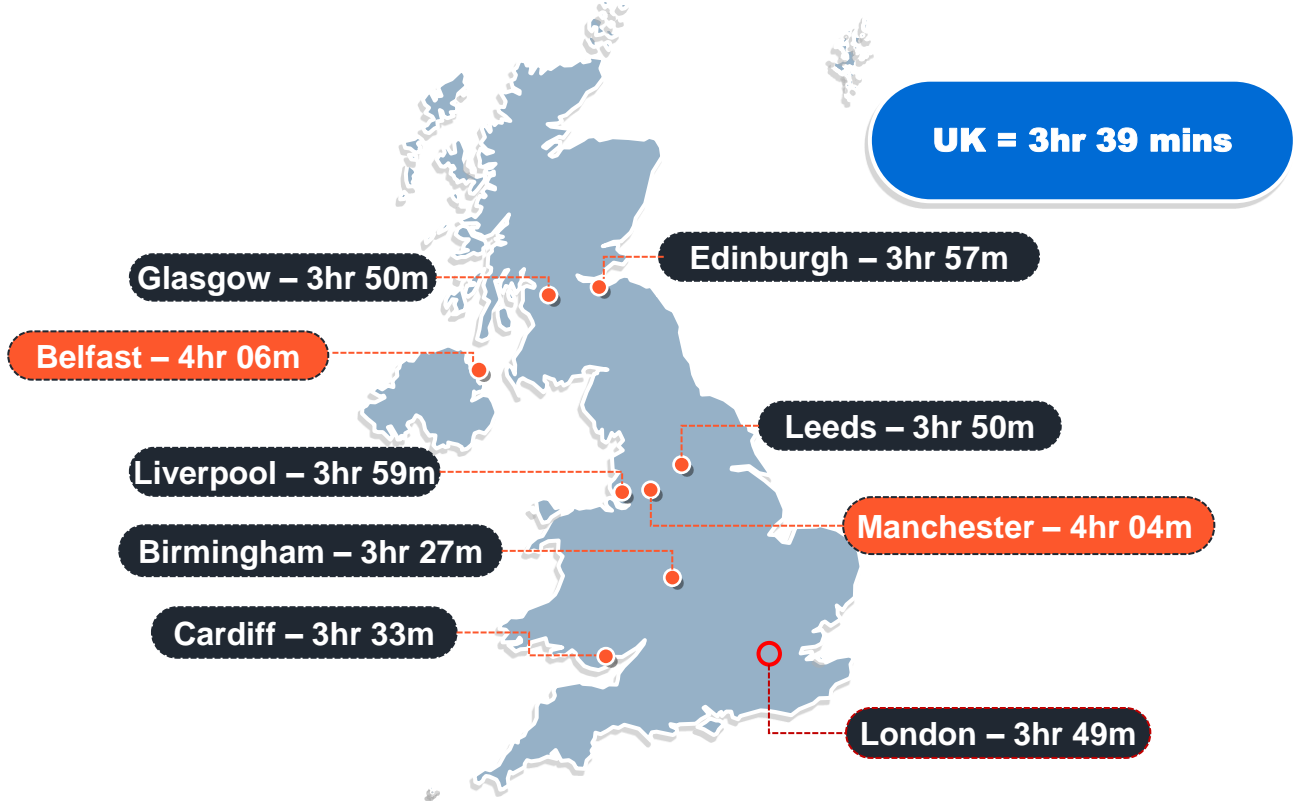


Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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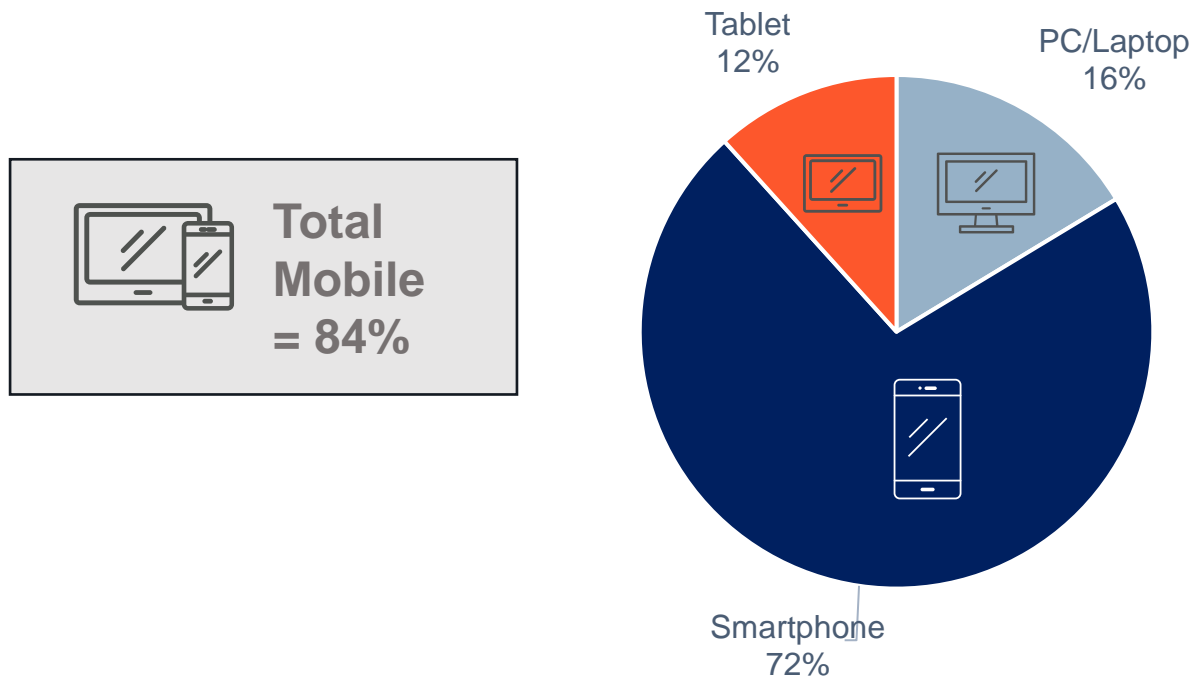
Average time online per day by city (hh:mm)

Residents of Manchester & Belfast spent over 4 hrs online per day on average in September



Share of minutes by device

Smartphones account for 72% of time online

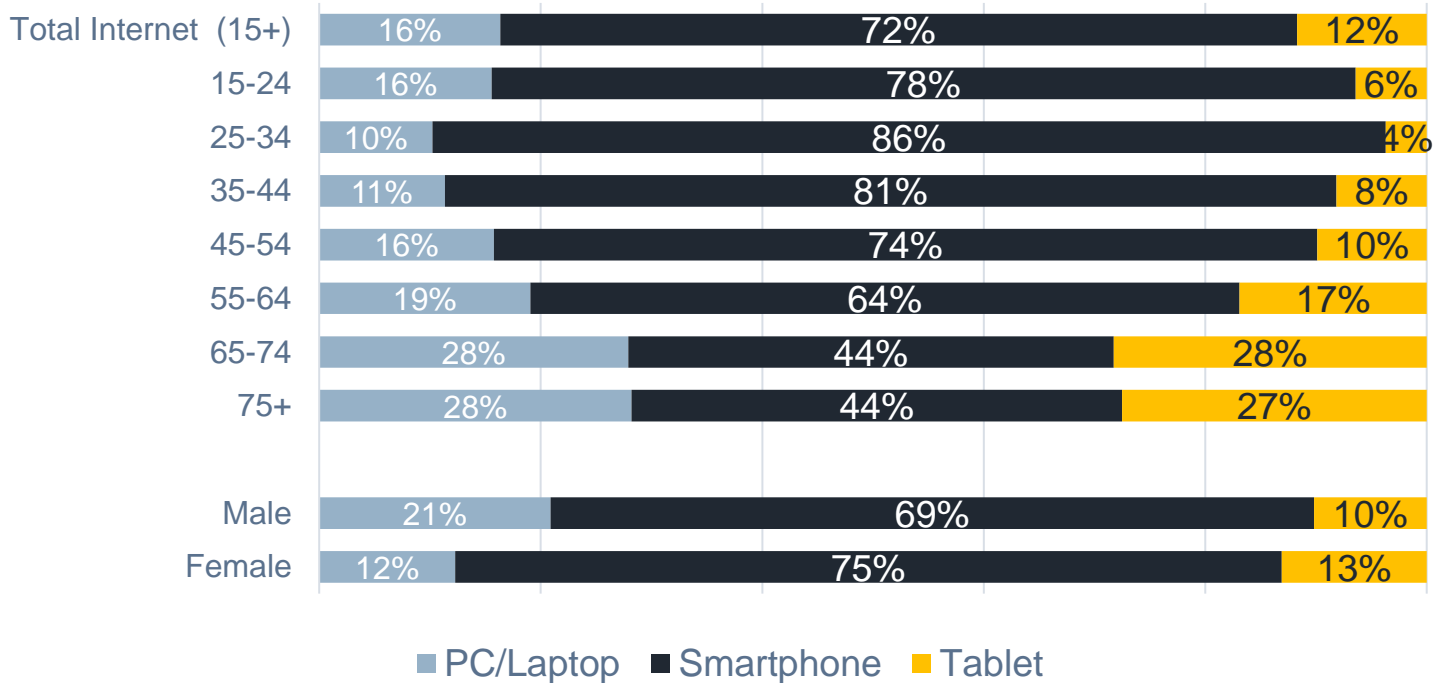


Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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, Sept 2022

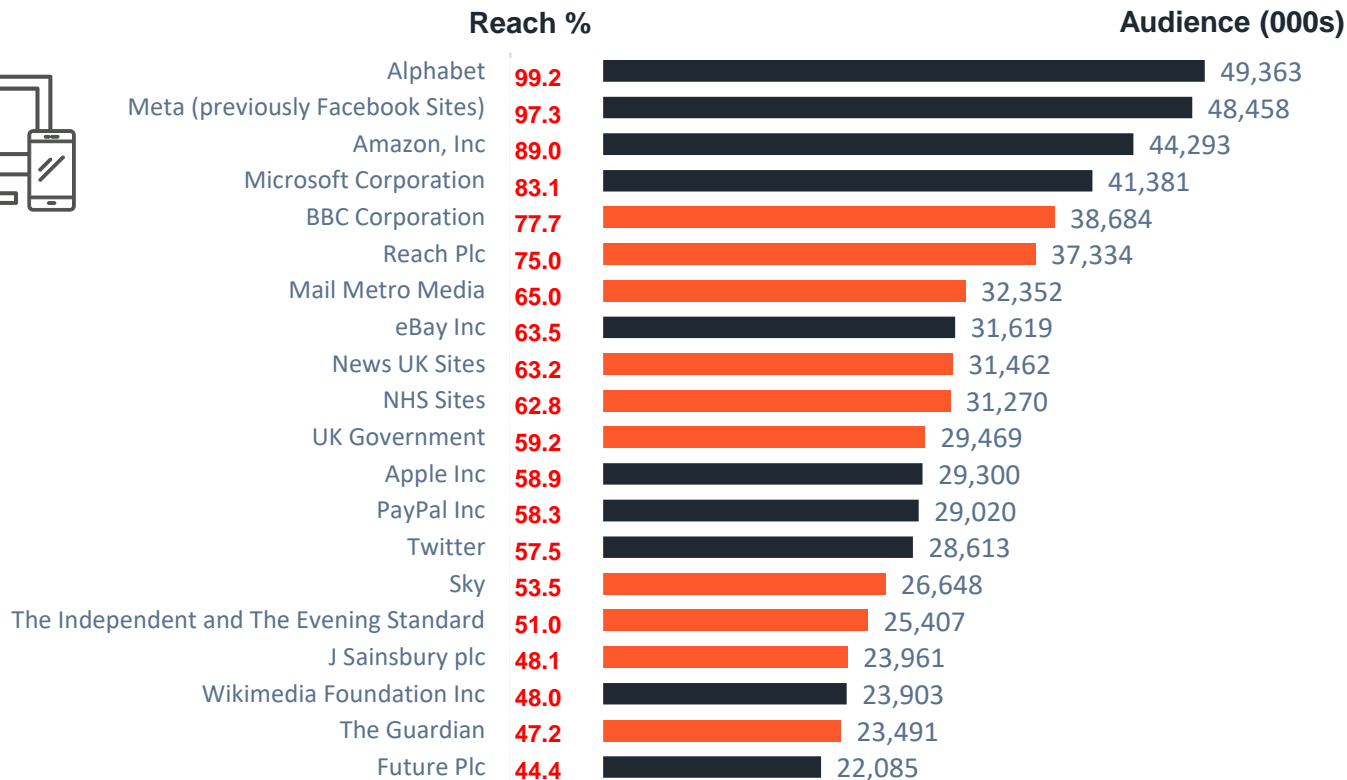
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Top organisations and brands



Top 20 organisations by audience

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



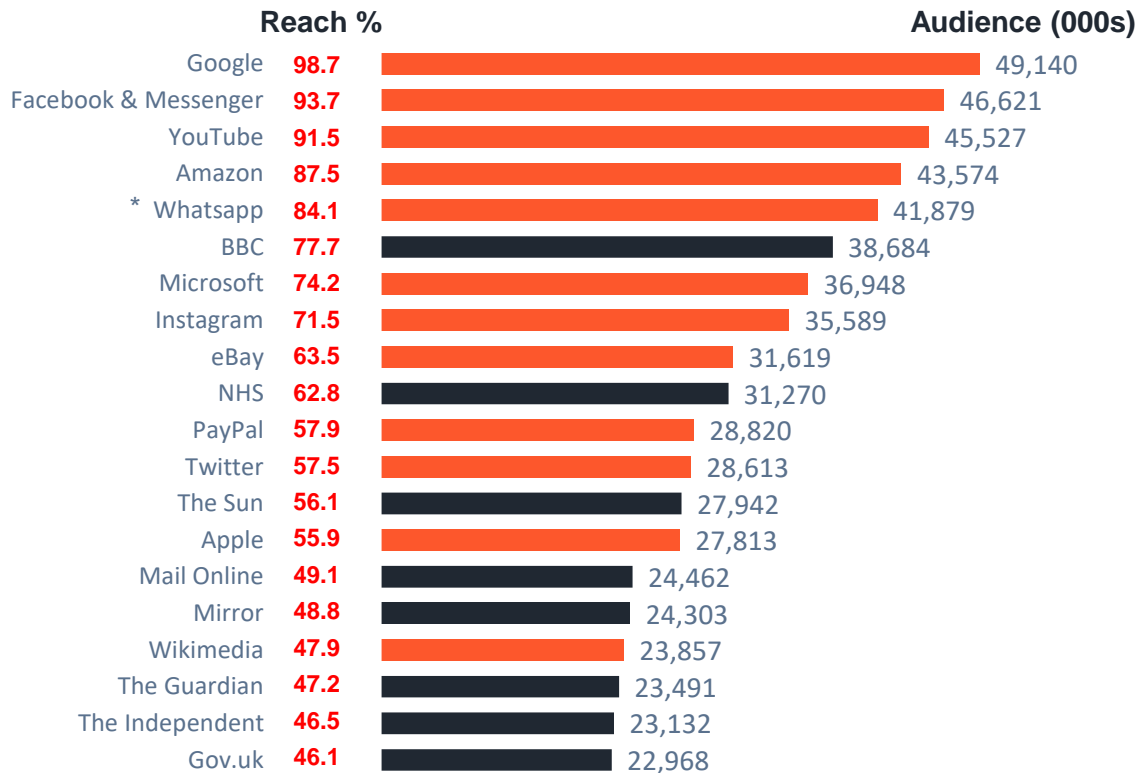
Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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



Top 20 online brands by audience

US global brands dominate the top 10



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

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. *WhatsApp app is currently under investigation

Top mobile apps

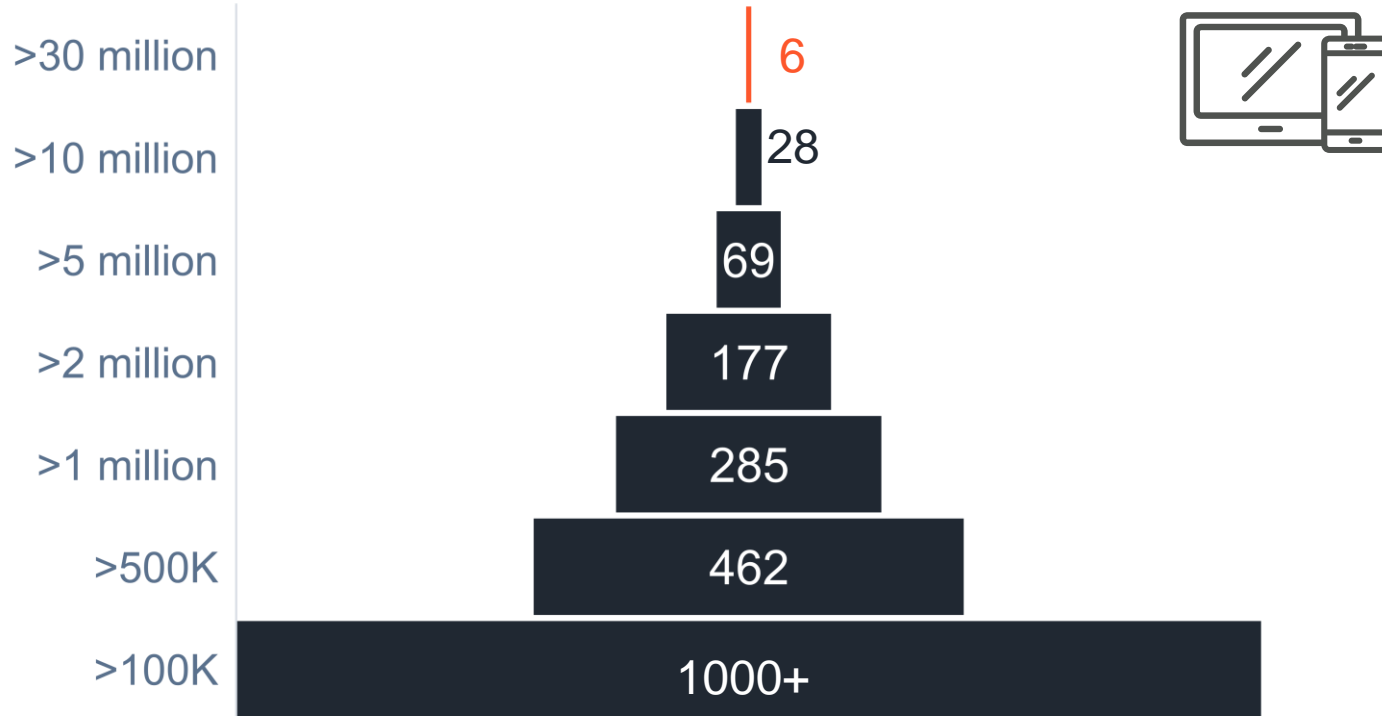


Number of mobile apps by audience size: Sep 22

Only 6 apps have an audience of over 30 million (>60% reach)



Audience Size

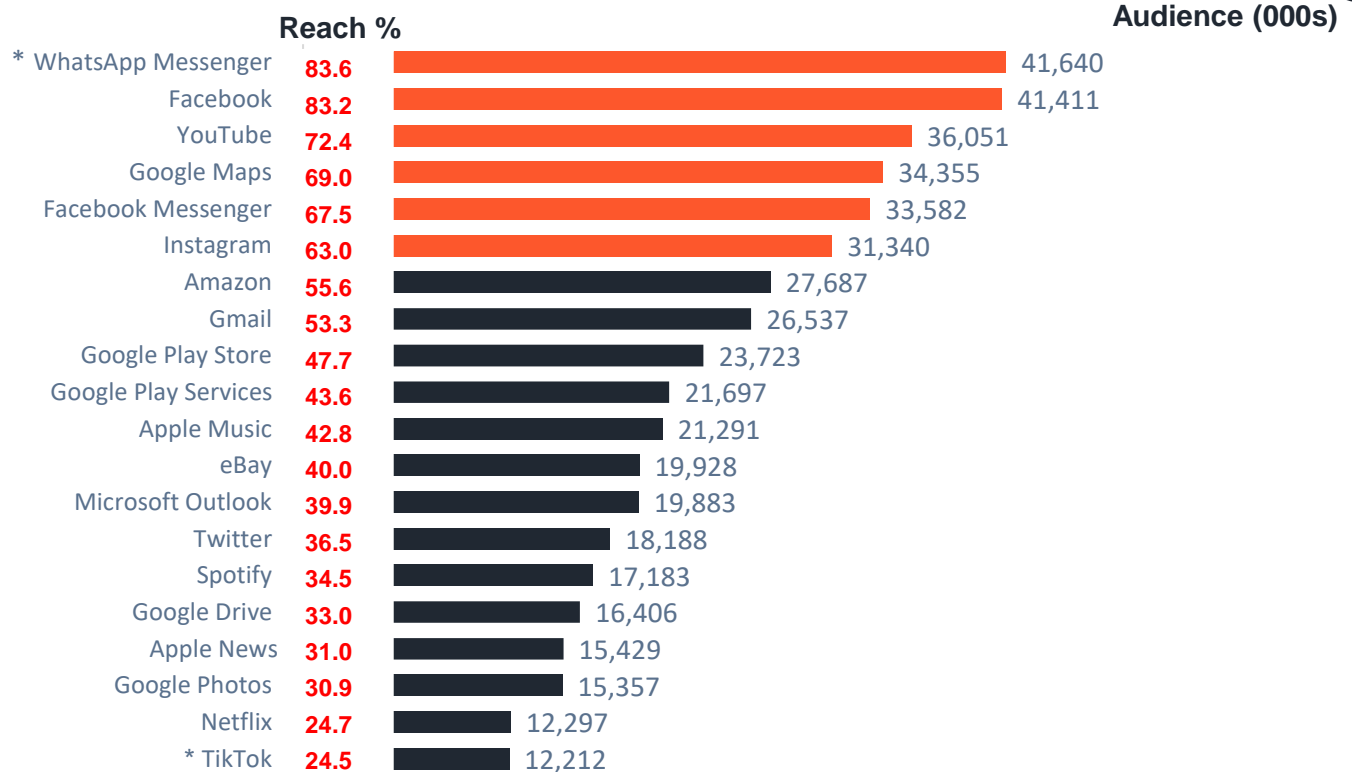


Source: UKOM Ipsos iris Online Audience Measurement Service, Sept 2022

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

Top 20 mobile apps by audience

The top 6 mobile apps are all from Google or Facebook



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

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. *WhatsApp and TikTok apps are currently under investigation



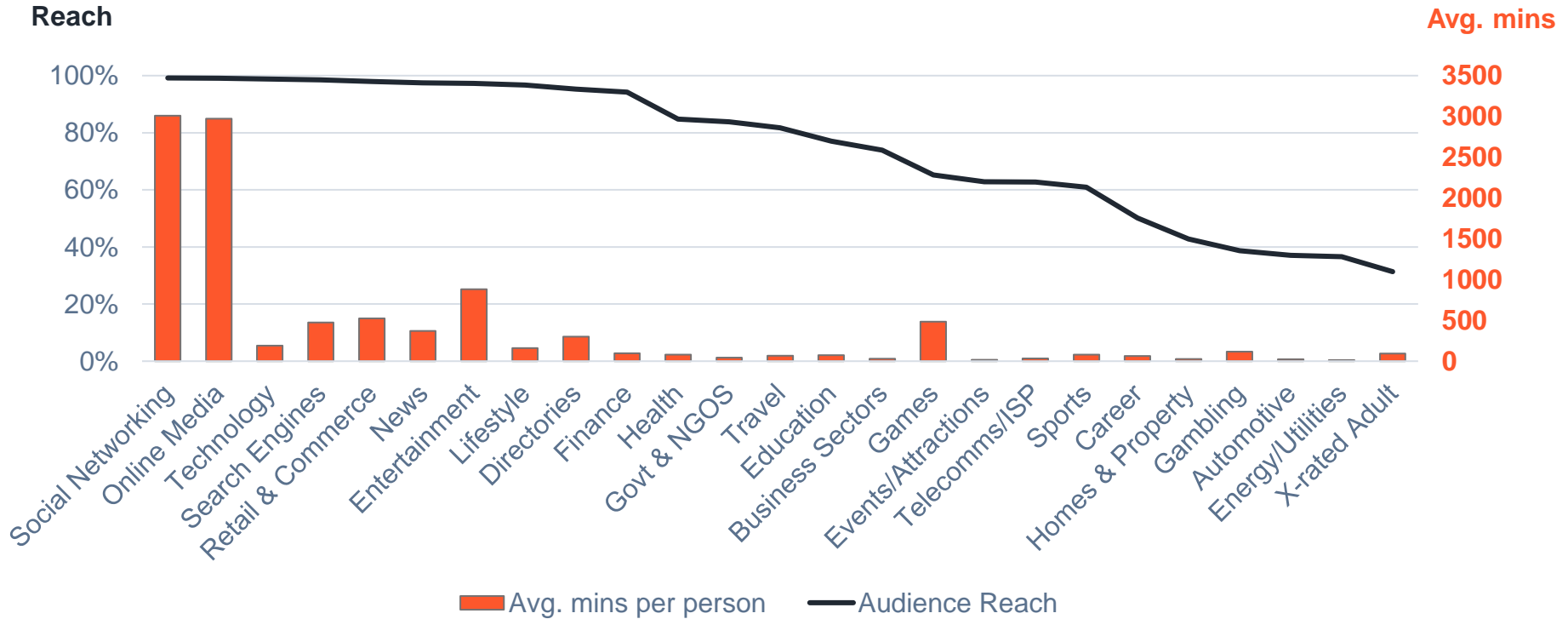
Category Comparisons



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



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



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

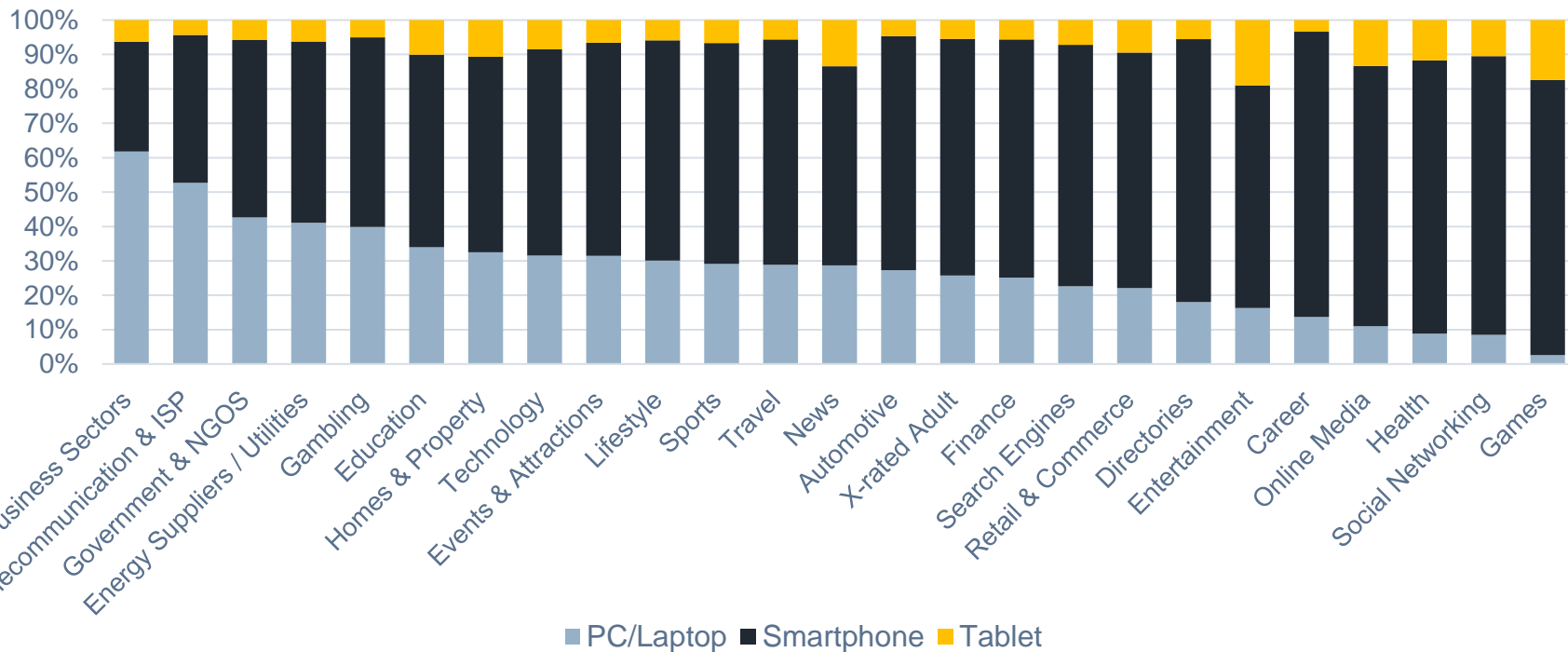
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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, Sept 2022

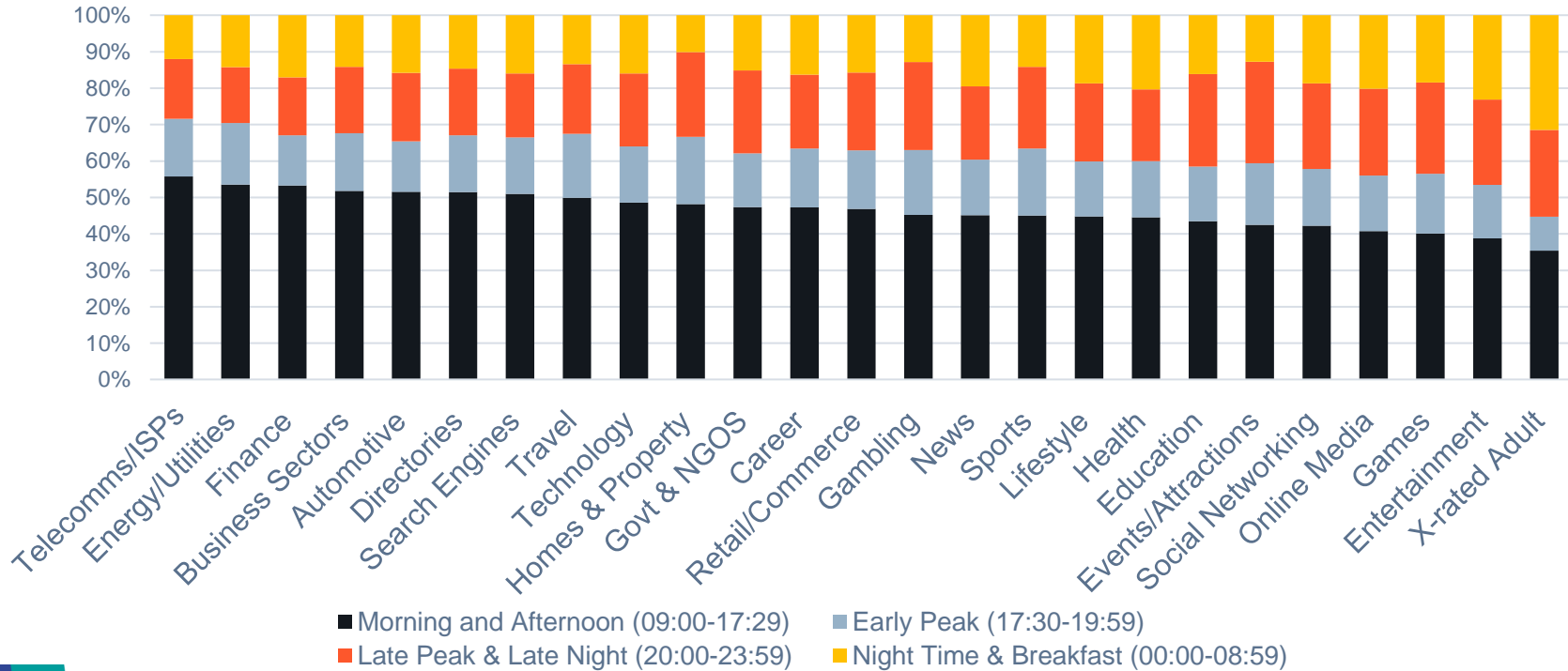
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NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

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



Telecoms, utilities and finance during the day; Entertainment and gaming in the evening.



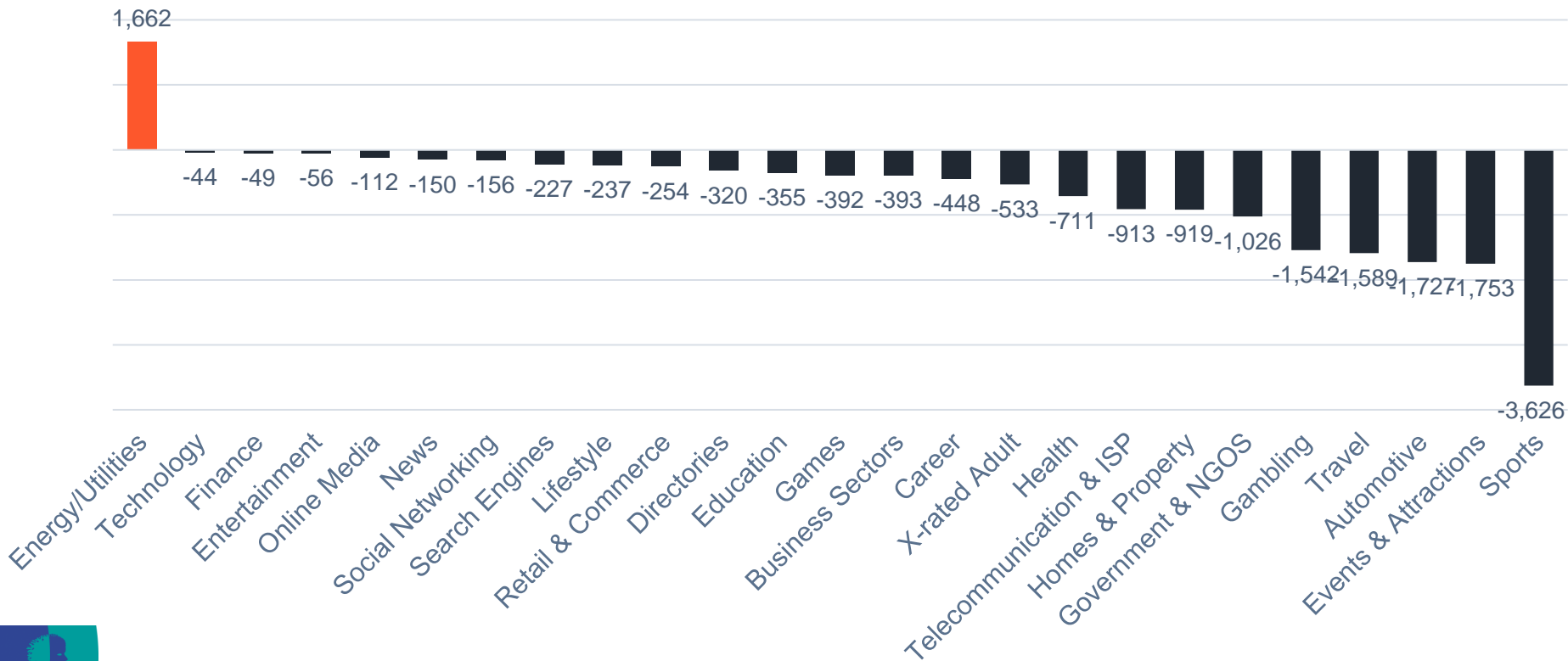
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NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

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

Energy/Utilities was the only category that added audience between July and Sept



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

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

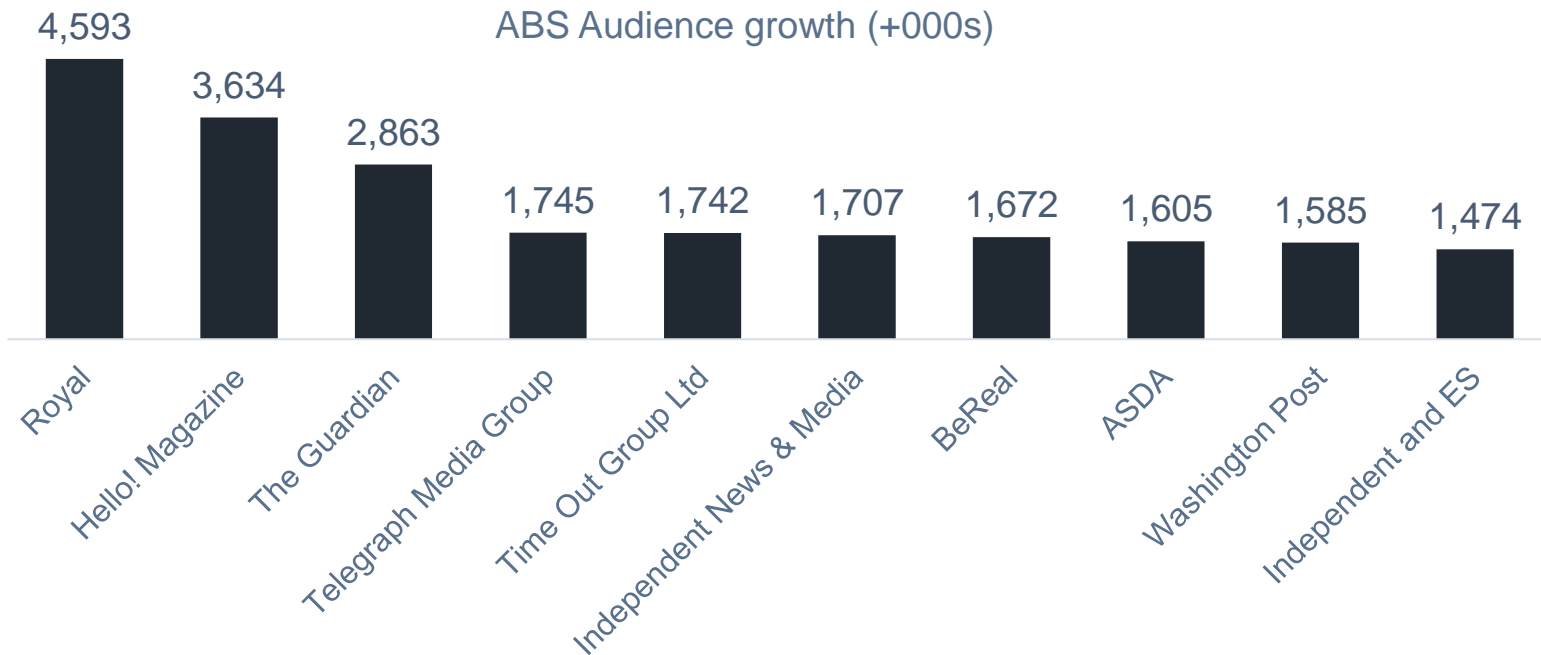
Growth: July-Sept 2022



Organisations adding the most audience: Jul-Sep 22



The Queen's death drove up audiences for Royal.UK, Hello! and the News organisations



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

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

Online brands adding the most audience: Jul-Sep 22

The Evening Standard and Time Out's online audience grew as all eyes turned to London



	AUDIENCE (000S)			
	JUL '22	SEP '22	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	49,833	49,782	-0.1 %↓	-51
Royal	188	4,781	2,446.2 %↑	4,593
Hello! Magazine	11,051	14,711	33.1 %↑	3,660
The Guardian	20,629	23,491	13.9 %↑	2,863
Disney	8,026	9,851	22.7 %↑	1,825
The Evening Standard	9,809	11,611	18.4 %↑	1,802
The Telegraph	16,740	18,486	10.4 %↑	1,745
Timeout	3,449	5,191	50.5 %↑	1,742
BeReal	352	2,023	475.5 %↑	1,672
Town and Country	574	2,191	281.5 %↑	1,616
ASDA	11,548	13,159	13.9 %↑	1,610



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

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

Mobile Apps adding the most audience: Jul-Sep 22



Almost 3 million more people accessed the ASDA Rewards loyalty app after the supermarket rolled the scheme out nationwide to all stores in August.

	AUDIENCE (000S)			
	JUL '22	SEP '22	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	49,833	49,782	-0.1 %↓	-51
ASDA Rewards	1,152	4,110	256.8 %↑	2,958
Google Sheets	1,154	3,374	192.4 %↑	2,220
BeReal	352	2,023	475.5 %↑	1,672
Shein	2,143	3,410	59.1 %↑	1,267
Disney+	4,634	5,850	26.2 %↑	1,215
Vinted	4,716	5,792	22.8 %↑	1,076
Apple Podcasts	5,946	6,962	17.1 %↑	1,016
McDonald's UK	9,093	9,943	9.3 %↑	849
Premier League - Official App	1,350	2,192	62.4 %↑	842
McAfee Security: VPN & Privacy	736	1,557	111.7 %↑	821



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

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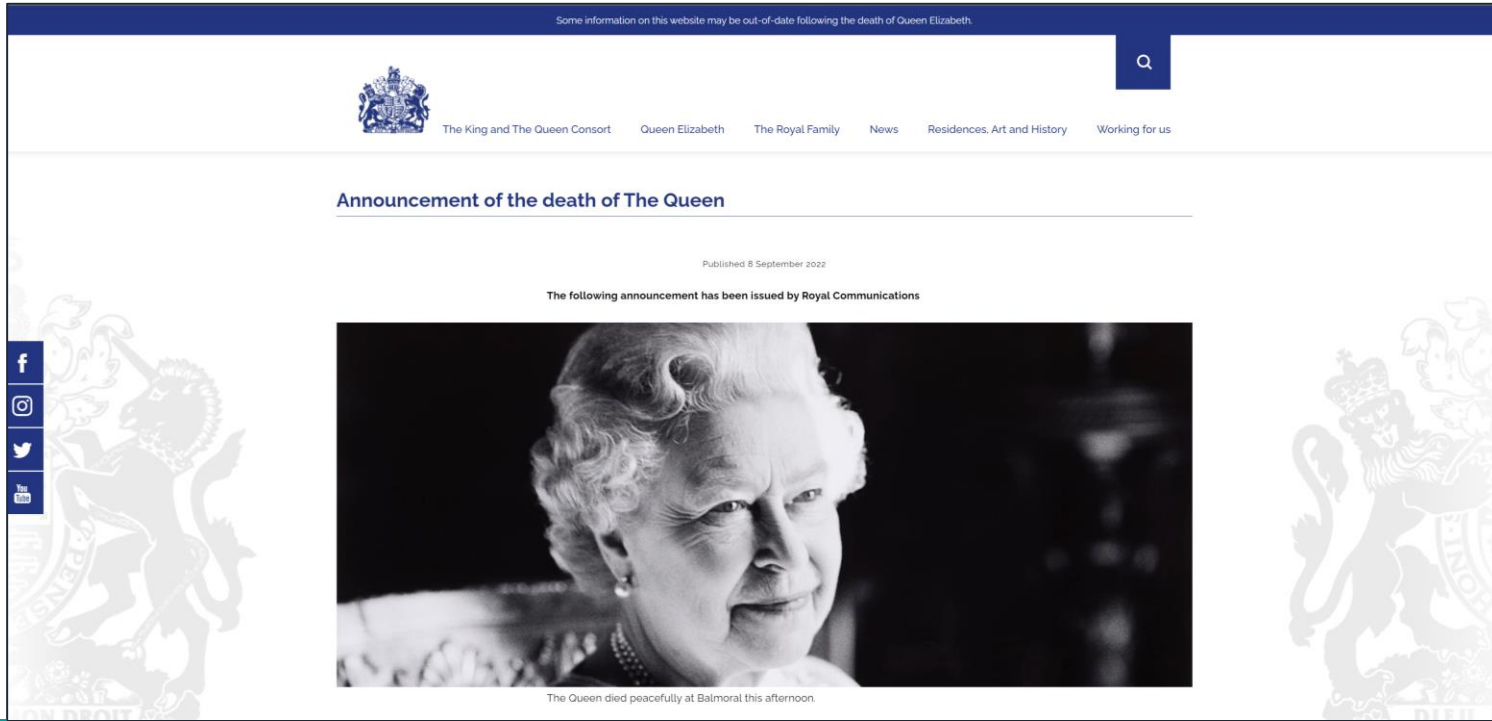


In the News



4.8 million people visited Royal.UK in September

The site added more visitors (+4.6m) than any other online UK brand in September with 1.6m visiting on the day of the Queen's death



Source: UKOM Ipsos iris Online Audience Measurement Service, Daily data, September 2022

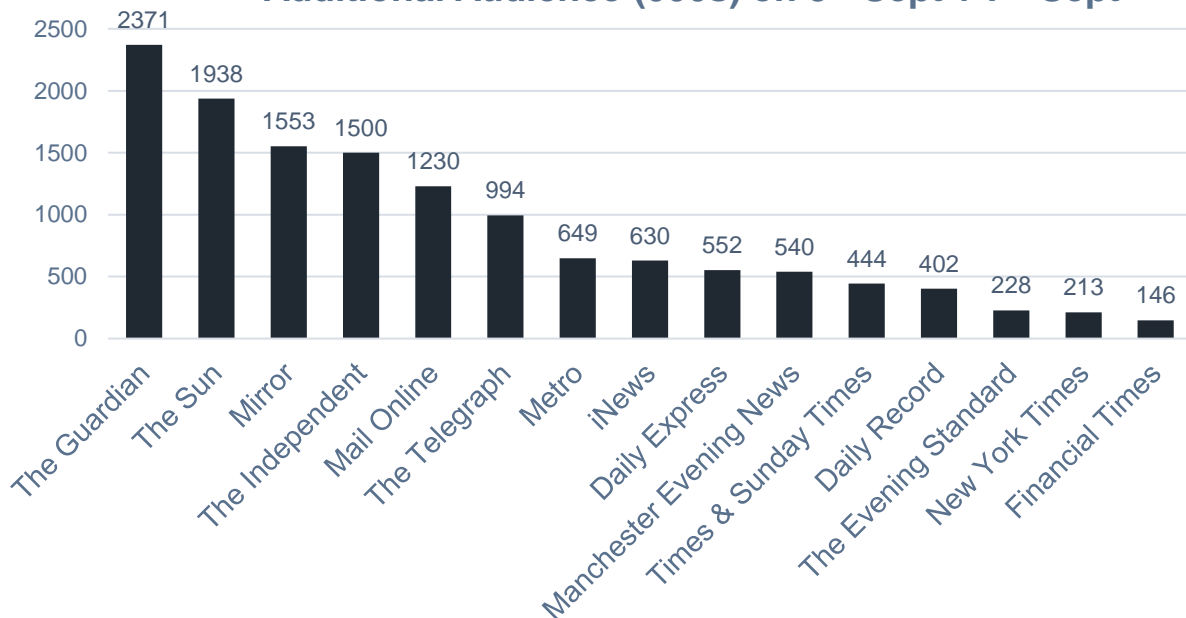
Base - All aged 15+ years using a PC, smartphone or tablet device(s), based on daily universes. Mobile apps = apps across smartphone and tablet devices.

Impact of the Queen's death: online newspapers

All major news brands witnessed audience uplifts on the day of the Queen's death. The Guardian's audience was 2.37m higher than the day before



Additional Audience (000s) on 8th Sept v 7th Sept



Source: UKOM Ipsos iris Online Audience Measurement Service, daily data, September 7th and 8th 2022

Base - All aged 15+ years using a PC, smartphone or tablet device(s). Mobile apps = apps across smartphone and tablet devices.

Impact of the Queen's death: broadcaster mobile apps



BBC iPlayer's audience increased by over 50% on the days of the Queen's death and funeral

MEDIA (Mobile App)	Day of Queen's Death - 8/9/2022			Day of Queen's Funeral - 19/9/2022		
	Audience (000s)	Reach		Audience (000s)	Reach	
BBC News	9417	18.9%	39%	6306	12.7%	2%
Sky News	2041	4.1%	59%	1443	2.9%	25%
BBC iPlayer	1798	3.6%	55%	2020	4.1%	60%
Sky Go	548	1.1%	53%	530	1.1%	-4%
ITV Hub	294	0.6%	23%	293	0.6%	9%



= % growth in audience compared to the day before



Source: UKOM Ipsos iris Online Audience Measurement Service, Top-line daily data, September 2022

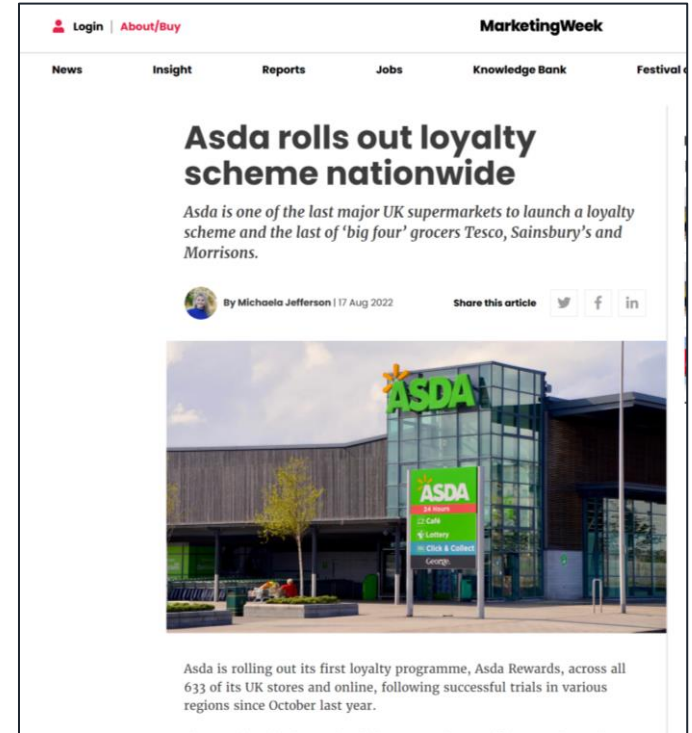
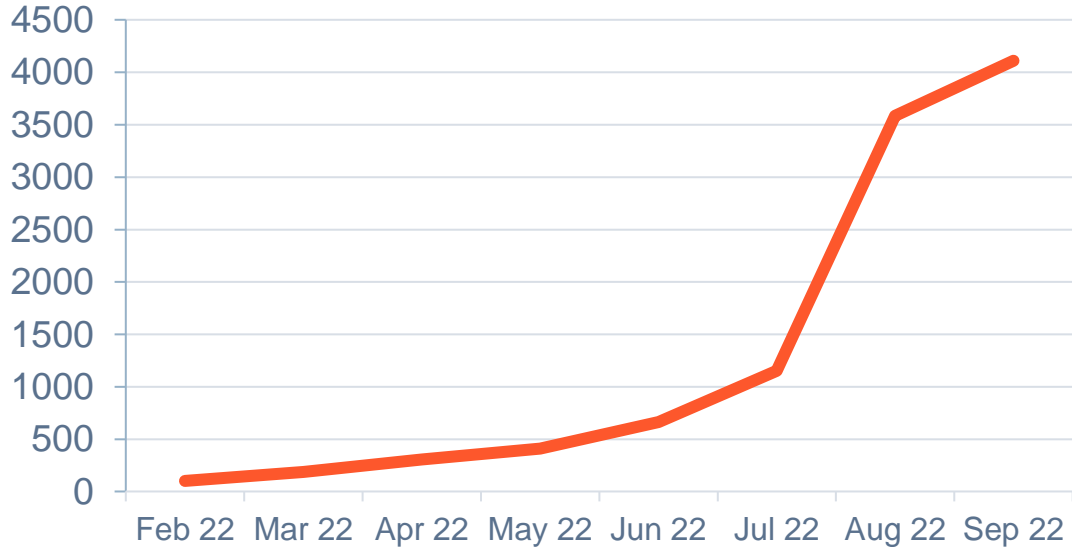
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Asda Rewards app: audience growth and profile



Over 4 million now use the Asda Rewards mobile app after it rolled out nationwide in August

ASDA Rewards app Audience (000s)



Source: UKOM Ipsos iris Online Audience Measurement Service

Base - All aged 15+ years using a PC, smartphone or tablet device(s). Mobile apps = apps across smartphone and tablet devices.

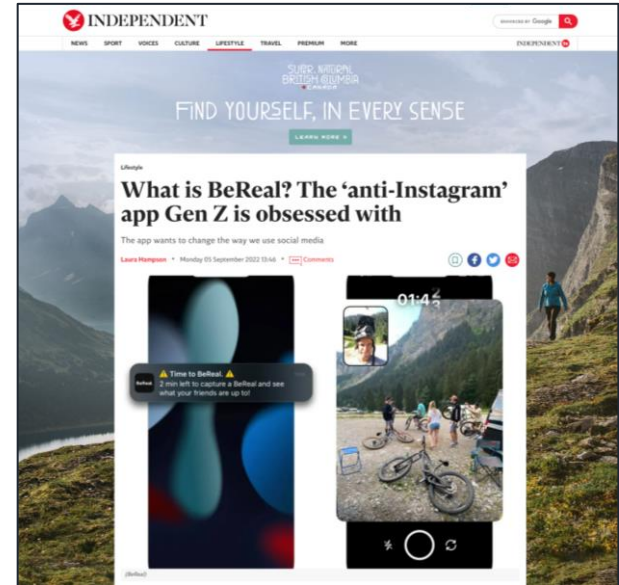
BeReal: audience and profile

BeReal's audience is currently young, female, single and image conscious.



- **2,023,109** visited BeReal in Sep 2022
- **72%** aged 15-24 (index = 475)
- **73%** female (index = 146)
- **72%** single (index = 172)

Top 5 indexing lifestyle statements (agree):	AUDIENCE AFFINITY INDEX	AUDIENCE COMPOSITION (%)
Celebrities influence my purchase decisions	286	13.09
I like to keep up with the latest fashions	234	32.62
I spend a lot of money on toiletries and cosmetics for personal use	180	32.23
I like to go to trendy places to eat and drink	167	36.68
I want to get to the very top in my career	161	62.72



Source: UKOM Ipsos iris Online Audience Measurement Service

Base - All aged 15+ years using a PC, smartphone or tablet device(s). Index = compared to Total Internet Audience 15+



Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

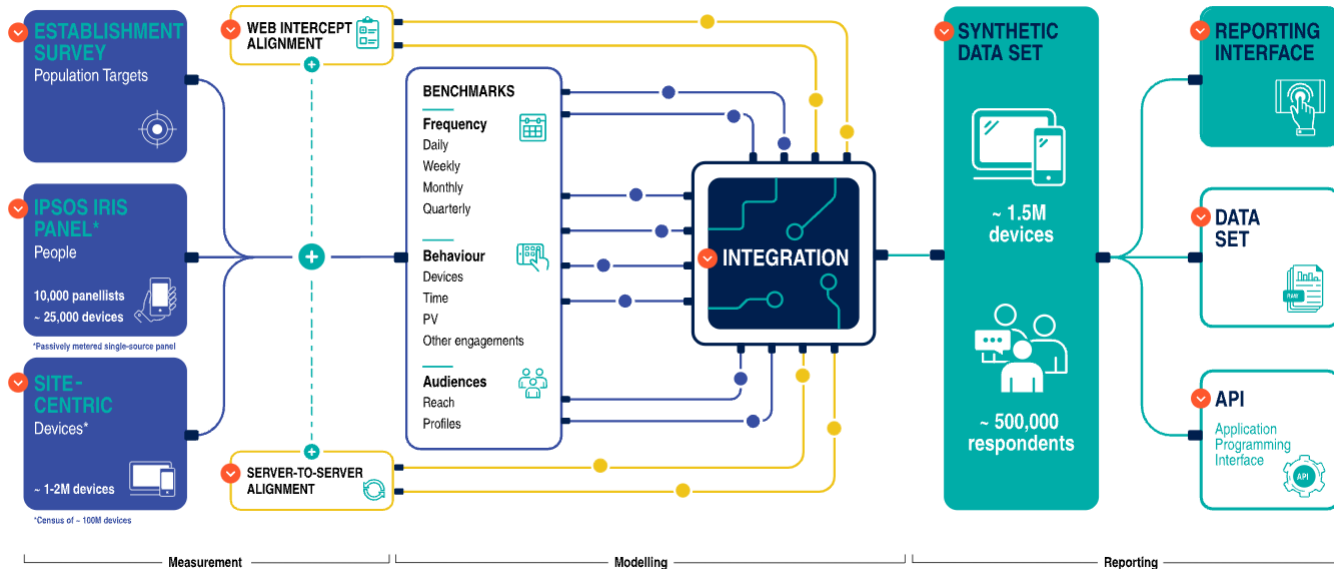
Methodology



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.

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/

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/>