

**UKOM**

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**Digital Market  
Overview**

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**Dec 2022**



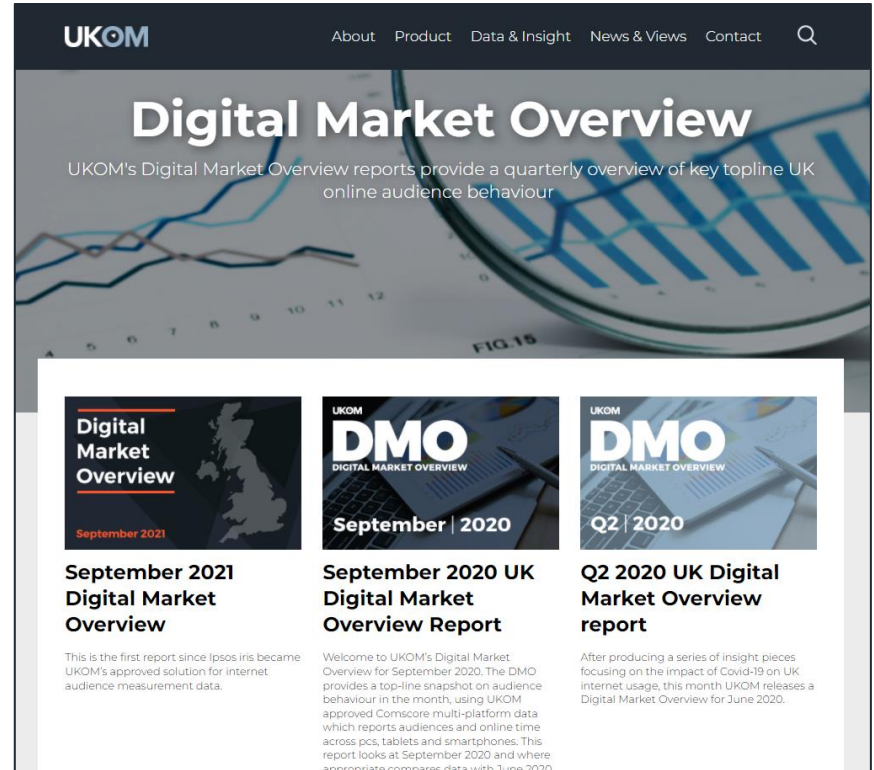
# The UK Digital Market Overview December 2022



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



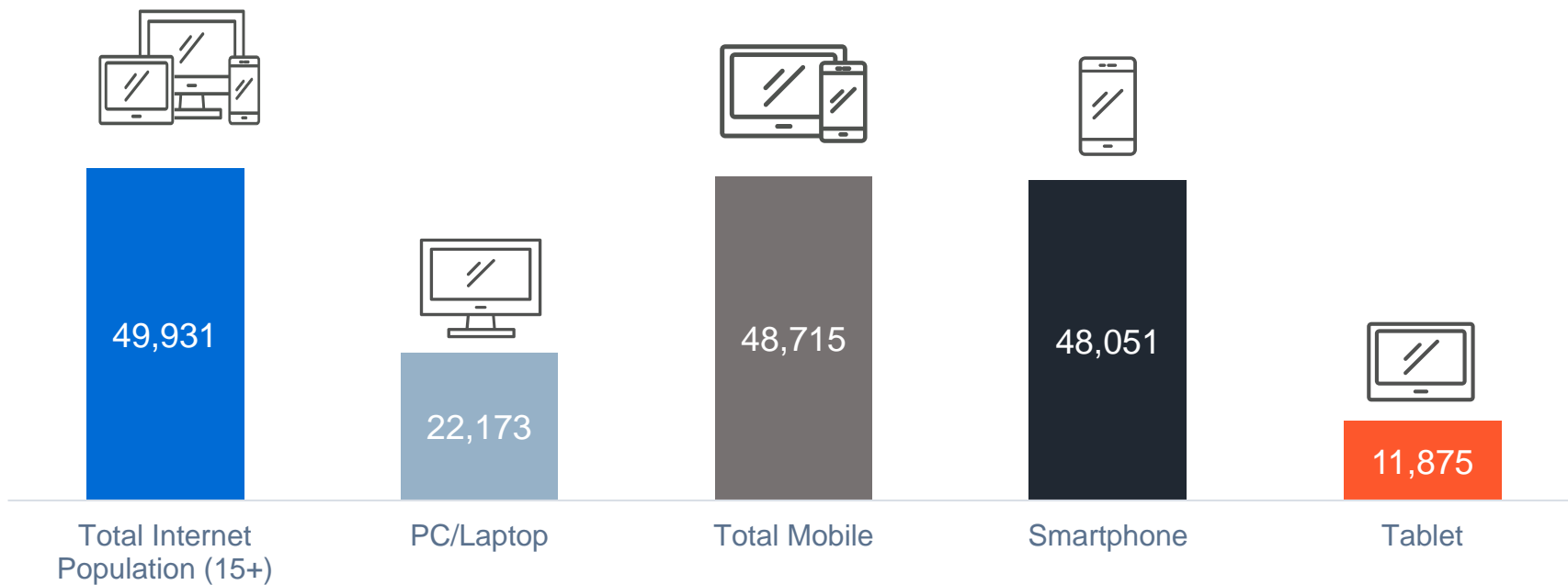
# Audience by device

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# Online audience by device (000s)

More than twice as many people use smartphones than computers



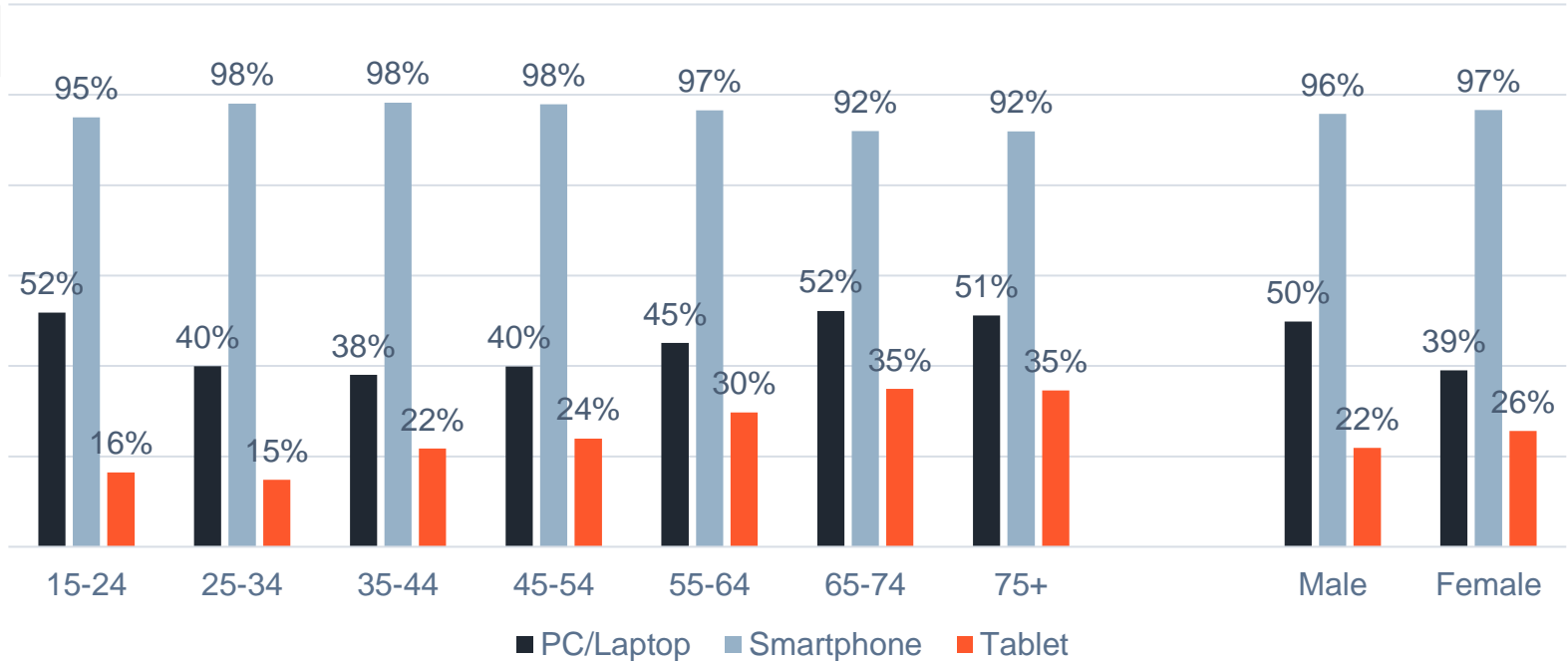
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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, Dec 2022

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

# Time online

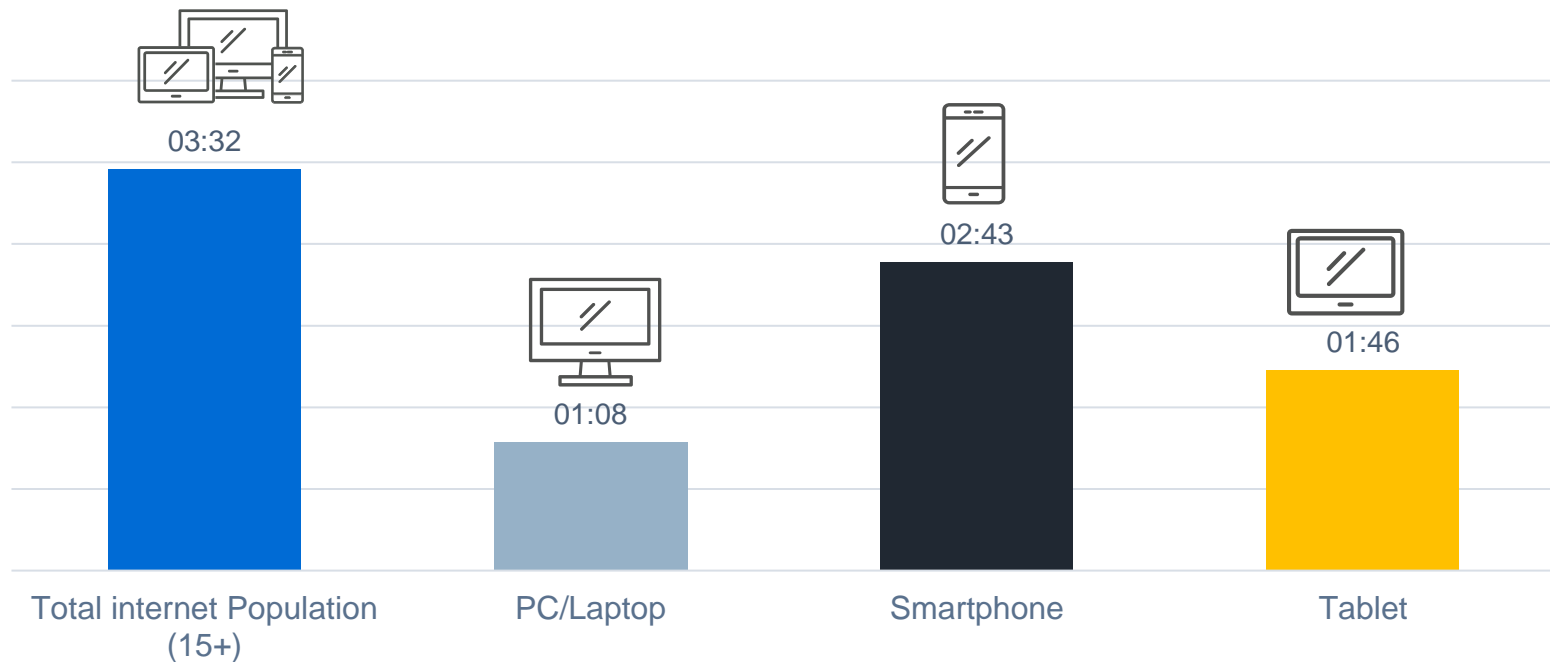
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# Average time spent online per day by device (hh:mm)



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



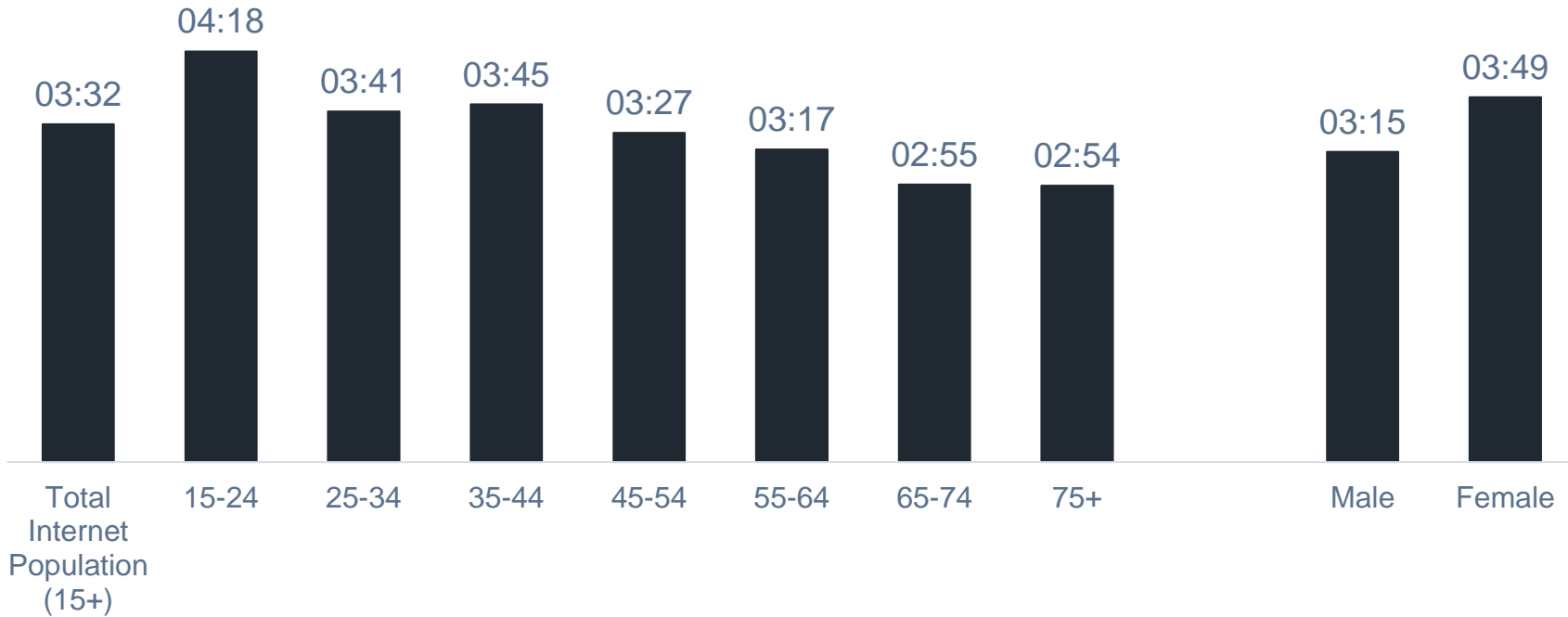
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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



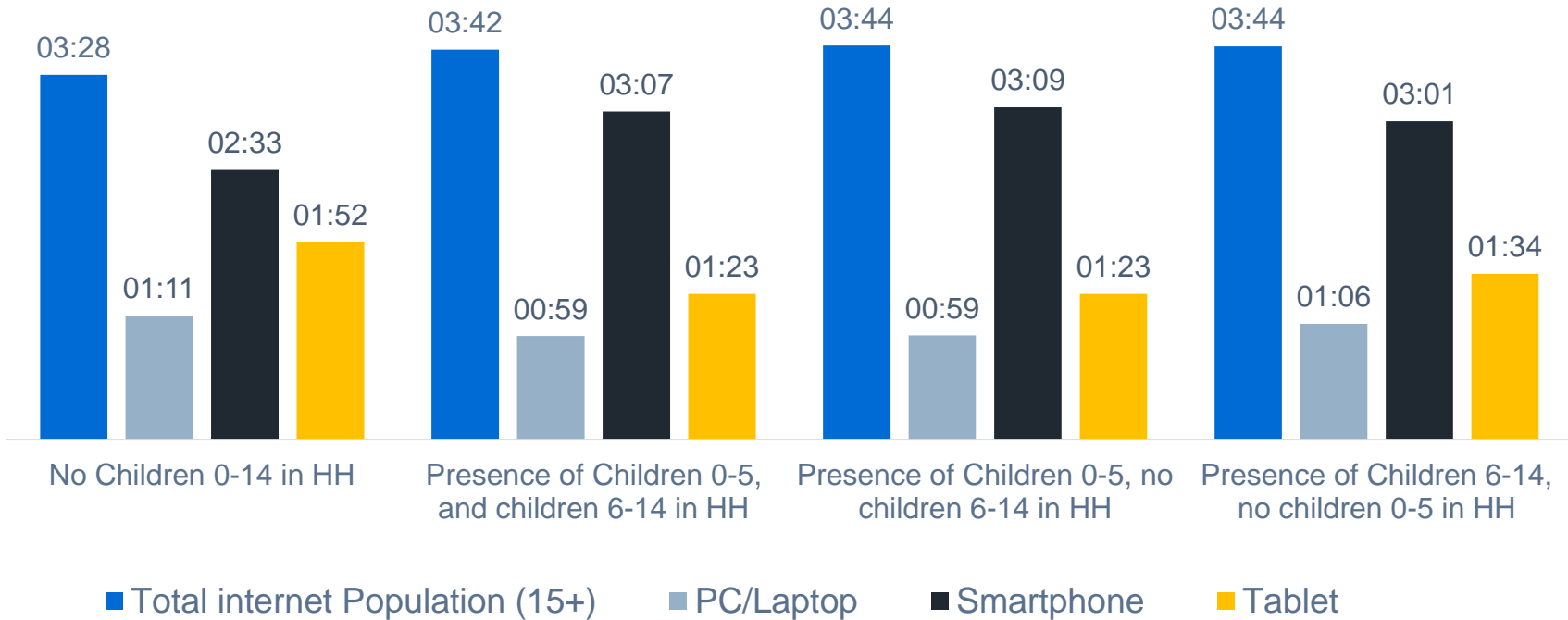
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



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



Parents with children spender longer online; those with kids aged 0-5 spend longer on smartphones

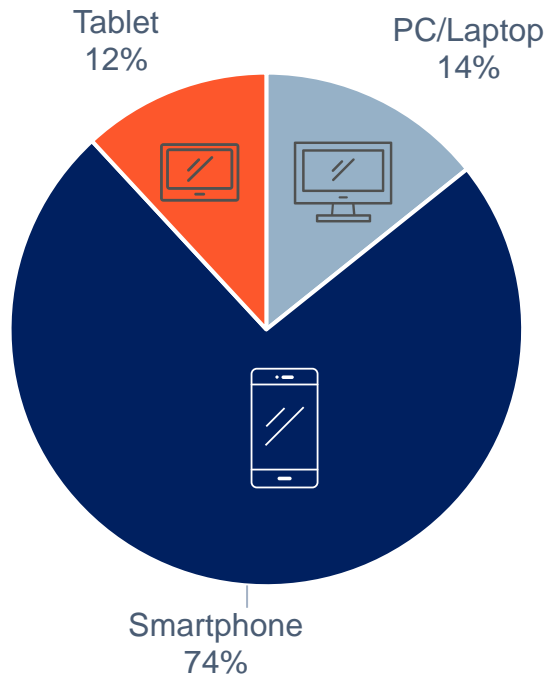
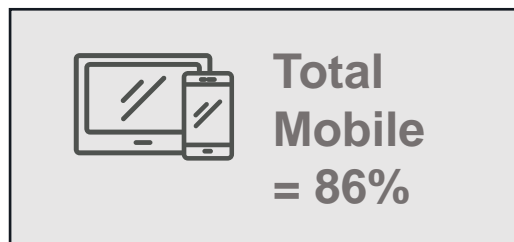


Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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

# Share of minutes by device

Smartphones account for 74% of time online



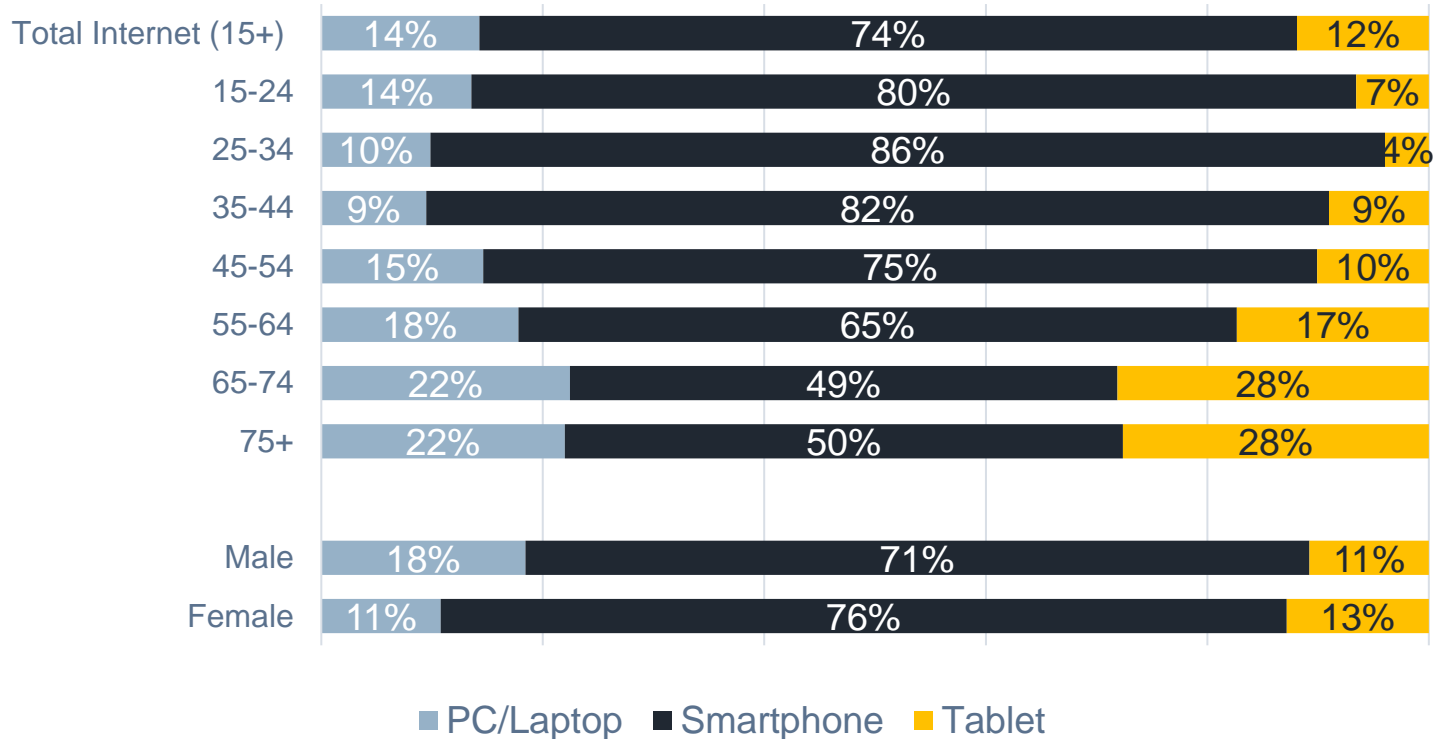
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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, Dec 2022

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

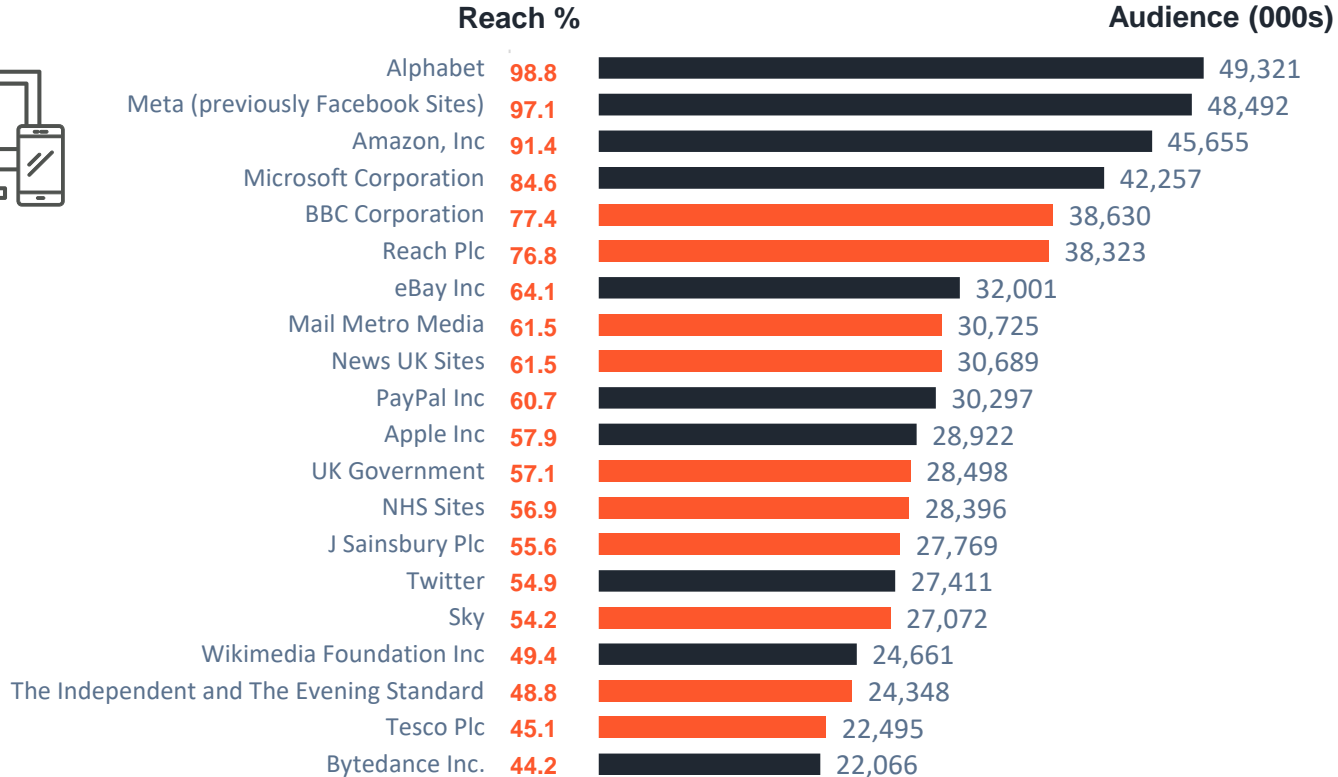
# Top organisations and brands

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# Top 20 organisations by audience

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



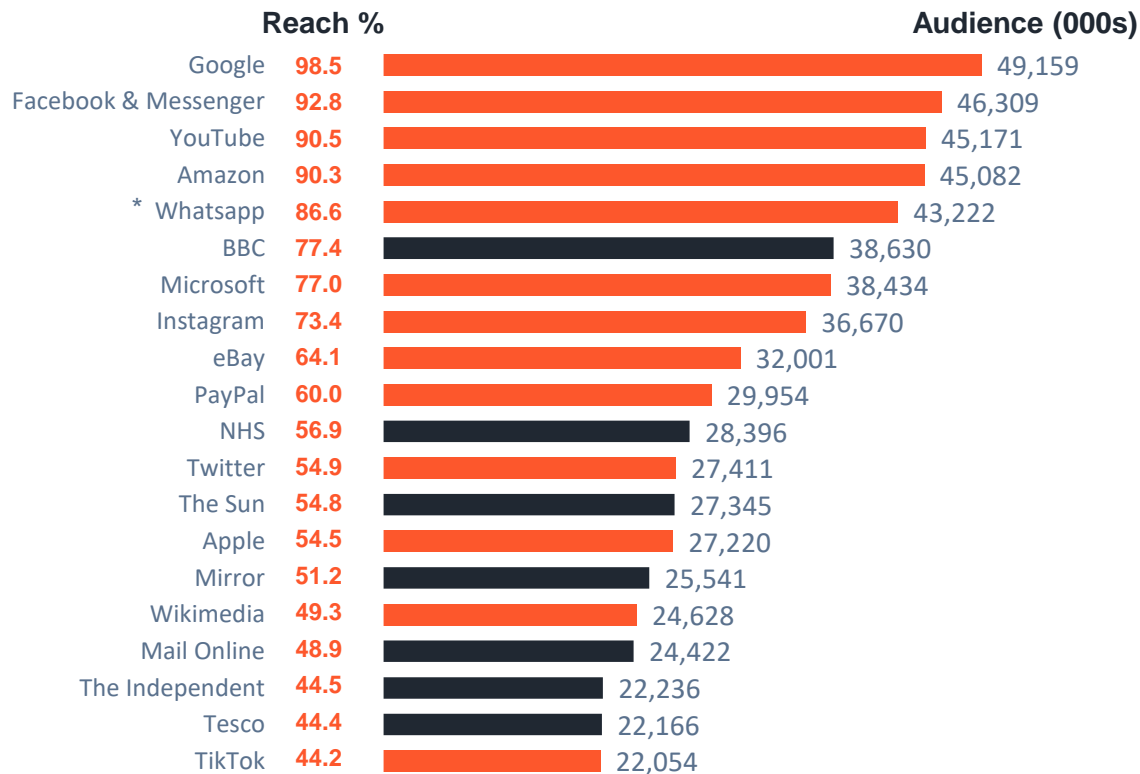
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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, Dec 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. \*WhatsApp app is 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	49,159	98.5
2	Facebook & Messenger	46,309	92.8
3	YouTube	45,171	90.5
4	Amazon	45,082	90.3
5	*Whatsapp	43,222	86.6
6	BBC	38,630	77.4
7	Microsoft	38,434	77.0
8	Instagram	36,670	73.4
9	eBay	32,001	64.1
10	PayPal	29,954	60.0

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	55,669	1202:07
2	YouTube	30,414	673:19
3	Google	23,785	483:50
4	TikTok	17,555	796:00
5	Instagram	13,933	379:57
6	Snapchat	9,421	835:07
7	BBC	9,334	241:38
8	*Whatsapp	9,088	210:16
9	Amazon	8,732	193:41
10	Microsoft	5,243	136:25



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 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\*.

\*WhatsApp app is currently under investigation

# Top mobile apps

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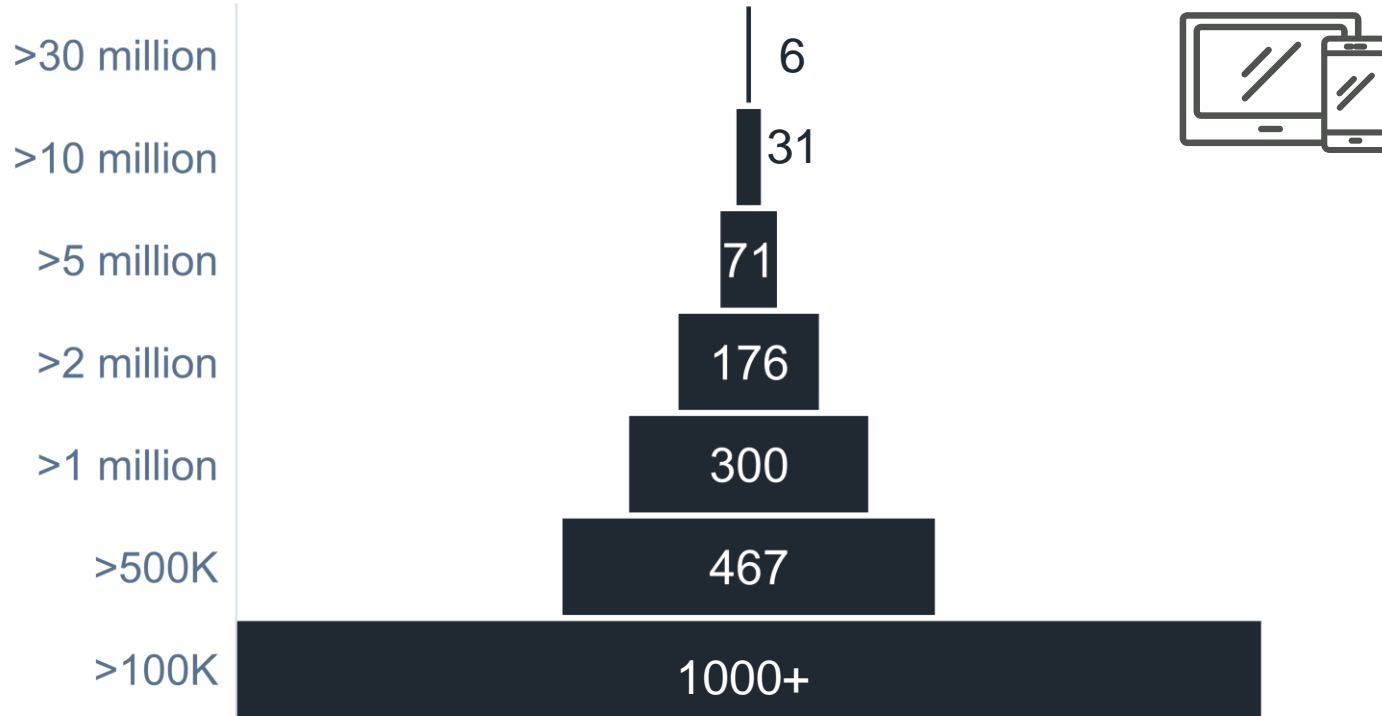


# Number of mobile apps by audience size: Dec 22

The number of apps with audiences over 10 million went up by 3 from 28 to 31 since December



## Audience Size



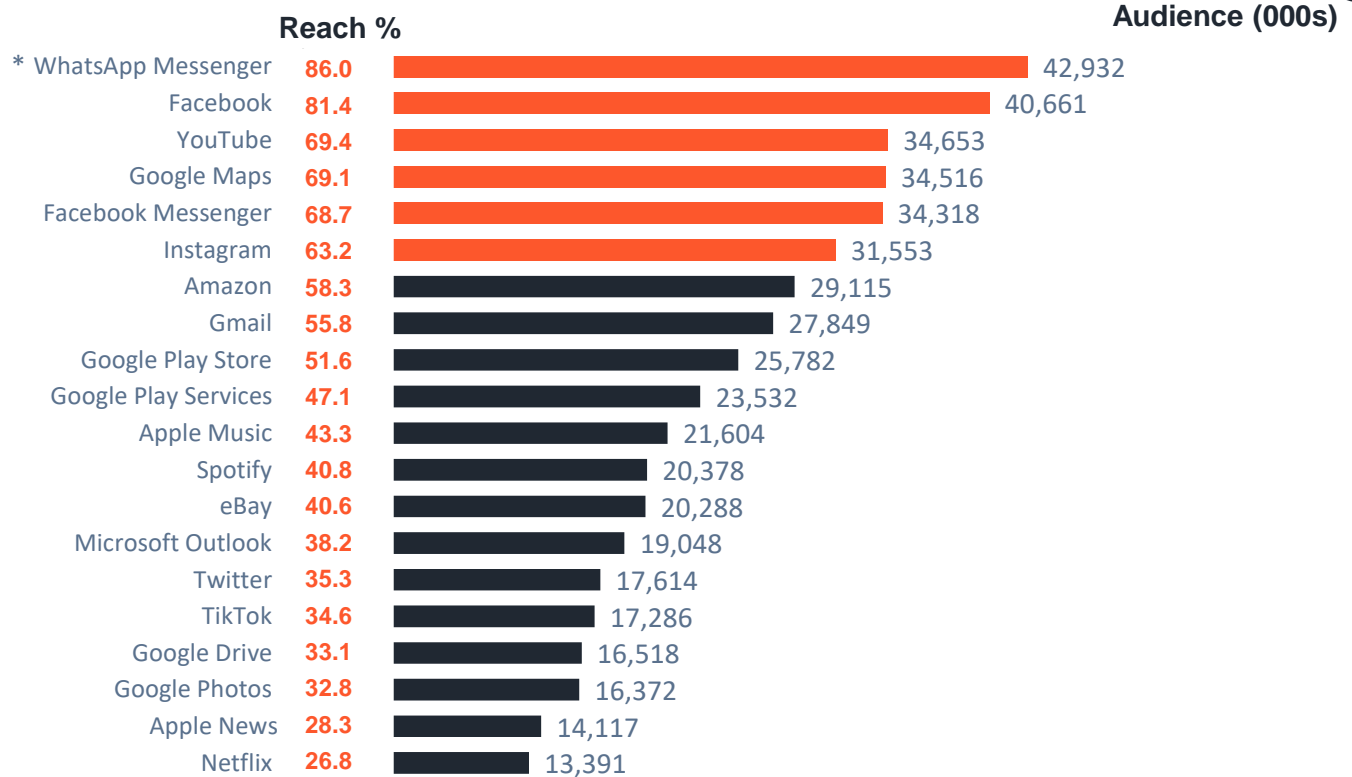
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 2022

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 and all the top 20 are global brands



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

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



# 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 Messenger	42,932	86.0
2	Facebook	40,661	81.4
3	YouTube	34,653	69.4
4	Google Maps	34,516	69.1
5	Facebook Messenger	34,318	68.7
6	Instagram	31,553	63.2
7	Amazon	29,115	58.3
8	Gmail	27,849	55.8
9	Google Play Store	25,782	51.6
10	Google Play Services	23,532	47.1

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	49,865	1226:23
2	YouTube	22,991	663:29
3	TikTok	17,499	1012:18
4	Instagram	13,673	433:20
5	Snapchat	9,379	847:47
6	*WhatsApp Messenger	8,928	207:58
7	Google Maps	3,713	107:34
8	Gmail	3,367	120:54
9	Amazon	3,260	111:59
10	Spotify	2,727	133:50



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 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'. \*WhatsApp is currently under investigation

# Top 10 apps by minutes by mobile device



Video services dominate the top 10 Tablet Apps for time



## Smartphone Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	42,221	1063:23
2	YouTube	17,078	517:51
3	TikTok	16,831	1013:34
4	Instagram	12,925	425:21
5	Snapchat	9,337	846:38
6	*WhatsApp Messenger	8,905	207:56
7	Google Maps	3,592	106:04
8	Amazon	3,127	109:48
9	Gmail	3,014	110:44
10	Spotify	2,558	130:18



## Tablet Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	7,645	1168:23
2	<b>YouTube</b>	<b>5,913</b>	<b>1108:22</b>
3	<b>Netflix</b>	<b>1,006</b>	<b>369:17</b>
4	<b>BBC iPlayer</b>	<b>750</b>	<b>294:13</b>
5	Instagram	748	253:33
6	<b>TikTok</b>	<b>668</b>	<b>565:12</b>
7	<b>ITVX</b>	<b>471</b>	<b>381:37</b>
8	<b>Amazon Prime Video</b>	<b>433</b>	<b>266:50</b>
9	<b>YouTube Kids</b>	<b>403</b>	<b>1115:25</b>
10	Gmail	353	117:44



Source: Ipsos, Ipsos iris Online Audience Measurement Service, Dec 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'. \*WhatsApp is currently under investigation

# Category Comparisons

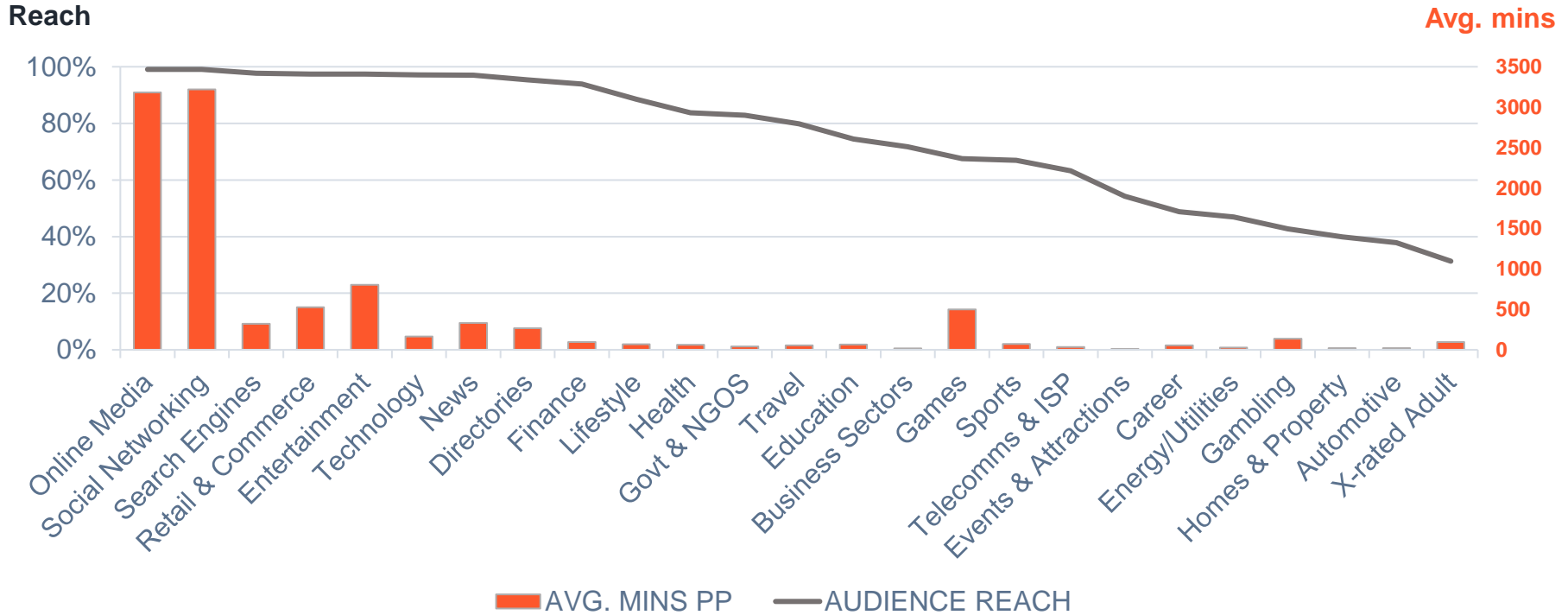
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# Reach & avg. mins pp by tier 1 category – Dec 22



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



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

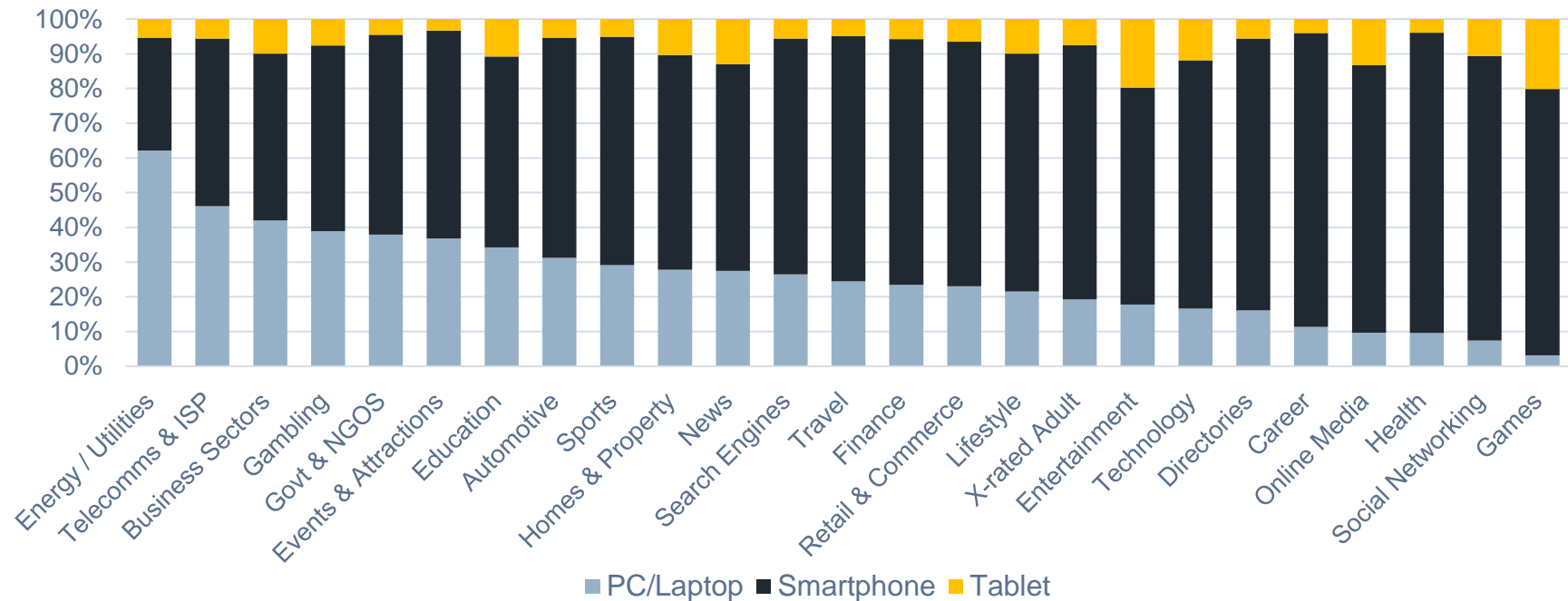
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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, Dec 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'

# Growth: Sep-Dec 2022

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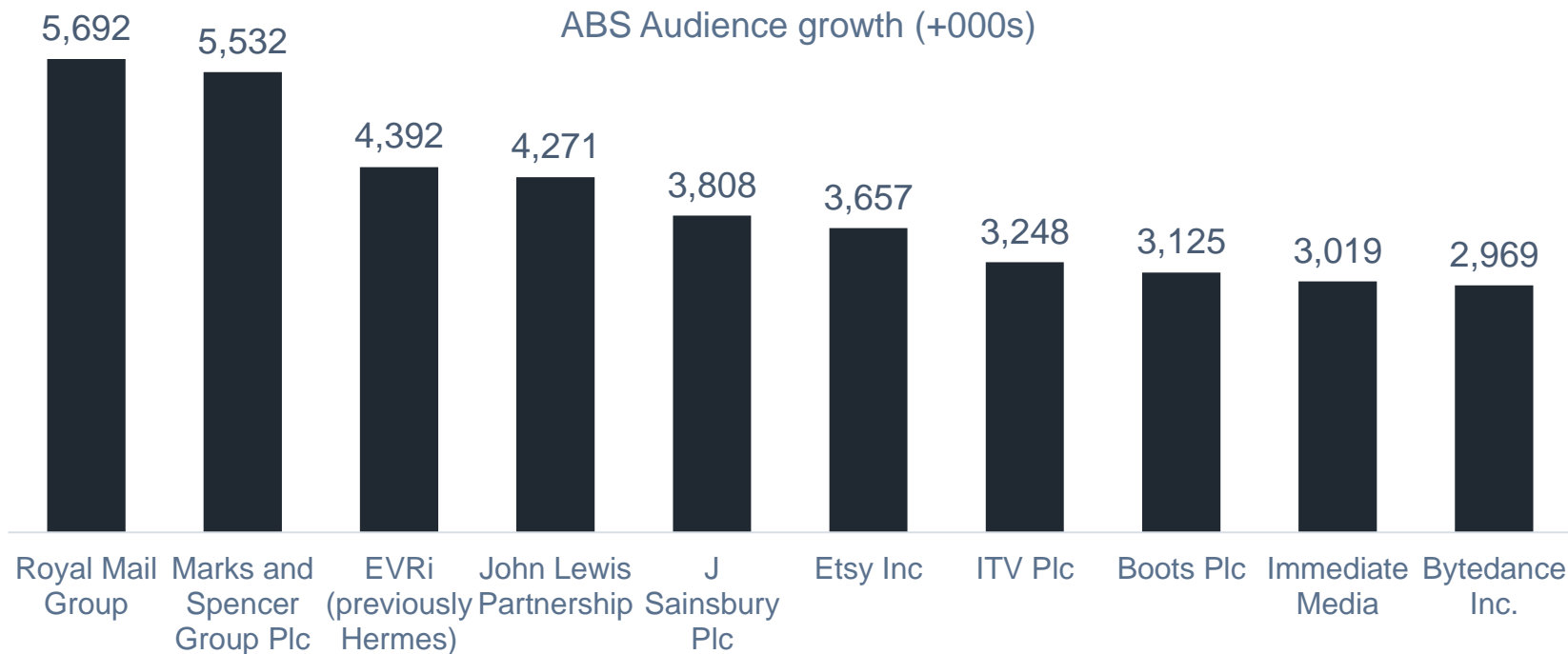




# Organisations adding the most audience: Sep-Dec 22



Retailers and delivery services featured strongly in the top 10



Source: UKOM Ipsos iris Online Audience Measurement Service, Sep and Dec 2022

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

# Online brands adding the most audience: Sep-Dec 22

Delivery Services and Retailers added most audience in December



	AUDIENCE (000s)			
	SEP '22	DEC '22	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	49,782	49,931	0.3 %↑	149
Royal Mail	14,089	19,879	41.1 %↑	5,791
Marks & Spencer	13,041	18,573	42.4 %↑	5,532
EVRi	9,935	14,287	43.8 %↑	4,352
Argos	17,700	21,996	24.3 %↑	4,295
John Lewis	9,940	14,041	41.3 %↑	4,101
Etsy	13,258	16,914	27.6 %↑	3,657
ITV	14,013	17,261	23.2 %↑	3,249
Sainsbury's	13,295	16,455	23.8 %↑	3,160
Manchester Evening News	15,251	18,346	20.3 %↑	3,095
BBC Good Food	11,699	14,772	26.3 %↑	3,072



Source: UKOM Ipsos iris Online Audience Measurement Service, Sep and Dec 2022

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

# Mobile Apps adding the most audience: Sep-Dec 22

Loyalty cards continue to grow whilst



	AUDIENCE (000s)			
	SEP '22	DEC '22	Change (%)	Change (abs)
<b>TOTAL INTERNET POPULATION (15+)</b>	49,782	49,931	0.3 %↑	149
TikTok	12,212	17,286	41.6 %↑	5,074
M&S	6,735	10,891	61.7 %↑	4,156
Tesco Grocery & Clubcard	5,413	9,263	71.1 %↑	3,850
ASDA Rewards	4,110	7,664	86.5 %↑	3,554
ITVX	2,380	5,819	144.5 %↑	3,440
Spotify	17,183	20,378	18.6 %↑	3,195
Google Play Store	23,723	25,782	8.7 %↑	2,059
BBC iPlayer	9,019	11,022	22.2 %↑	2,003
Amazon Prime Video	6,181	8,171	32.2 %↑	1,989
Google Play Services	21,697	23,532	8.5 %↑	1,835



Source: UKOM Ipsos iris Online Audience Measurement Service, Sep and Dec 2022

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

# Grocery retailer brands audience change: Sep-Dec 2022

Unsurprisingly, all major online food stores experienced audience uplifts in the run up to Christmas



	AUDIENCE (000s)			
	SEP '22	DEC '22	Change (%)	Change (abs)
Grocery/Supermarket Shopping	36,409	39,320	8.0 %↑	2,911
Marks & Spencer	12,820	18,398	43.5 %↑	5,578
Tesco	12,790	17,650	38.0 %↑	4,861
Sainsbury's	12,120	15,639	29.0 %↑	3,519
ASDA	11,976	13,476	12.5 %↑	1,499
Lidl UK	10,763	12,217	13.5 %↑	1,454
Aldi	6,750	8,003	18.6 %↑	1,253
Morrisons	6,811	7,488	9.9 %↑	677
Waitrose	4,513	6,265	38.8 %↑	1,752
Iceland	3,566	4,493	26.0 %↑	927
Ocado	3,224	4,053	25.7 %↑	829



Source: UKOM Ipsos iris Online Audience Measurement Service, Sep and Dec 2022

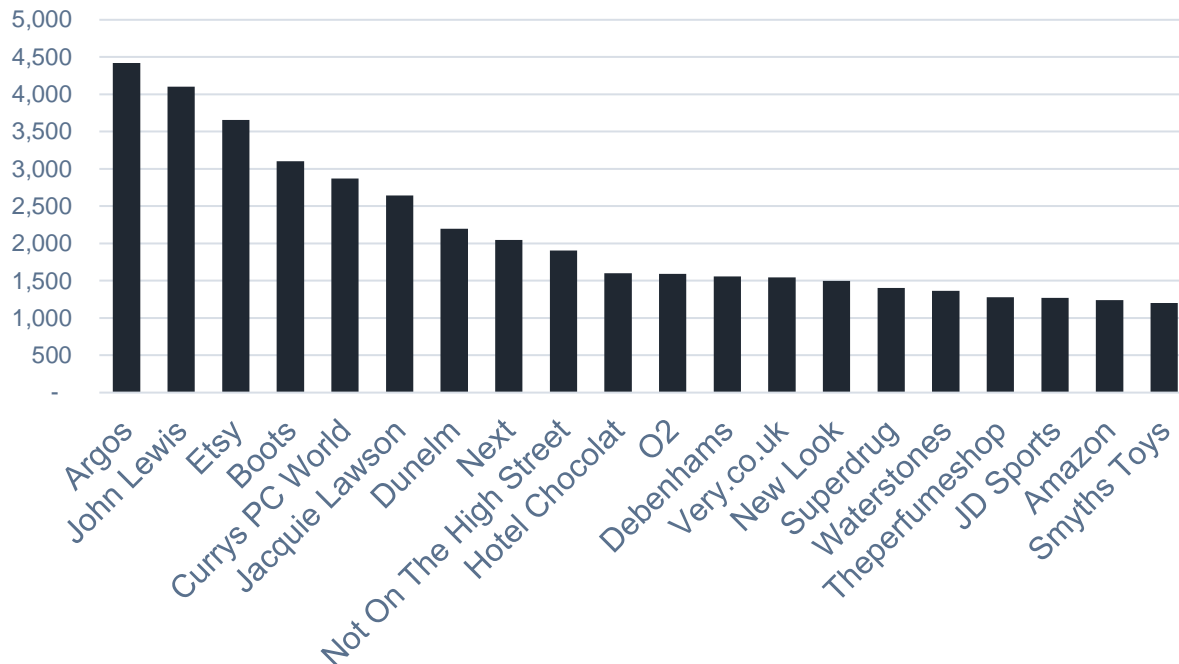
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

# Non-grocery retailers audience change: Sep-Dec 2022

Fashion and 'gift' retailers dominate the top 'growth' list of ecommerce brands



## Additional audience (000s) Sep-Dec: Non-grocery retailers



## Brands\* with high growth % (Sep-Dec 2002)

Jacquie Lawson	556%
Menkind	296%
Theperfumeshop	231%
Swarovski	209%
Fortnumandmason	204%
Thefragranceshop	199%
Findmeagift	189%
Cadburygiftsdirect	181%
Hotel Chocolat	175%
Cadbury	175%

Source: UKOM Ipsos iris Online Audience Measurement Service, Sep and Dec 2022

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

\*All brands had a monthly audience of at least 700K in Dec 2022





# In the News

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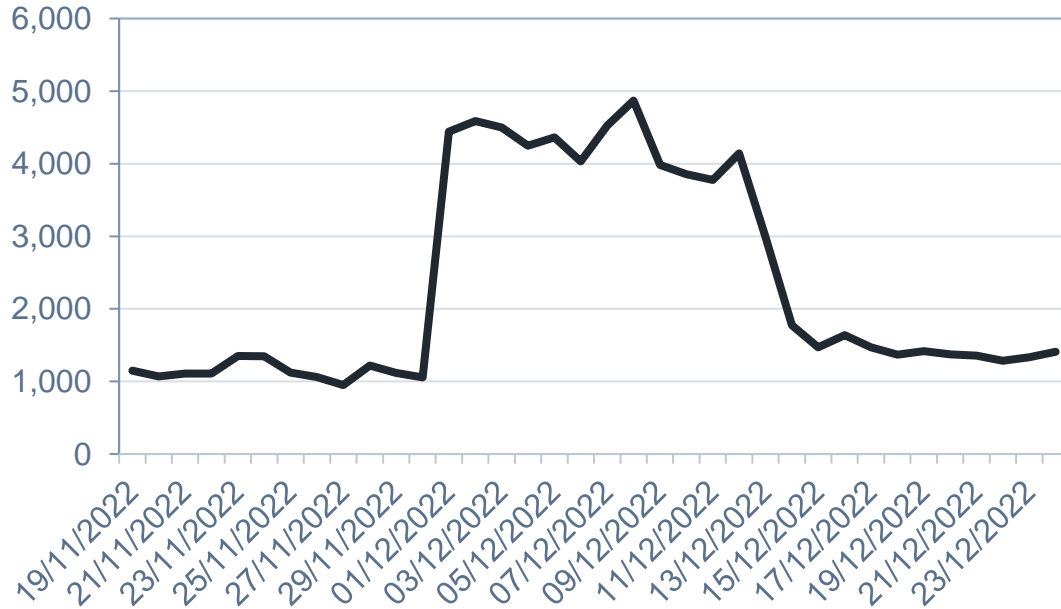


# M&S app: audience growth



Daily audiences during the 12 Days of Christmas Promotion surpassed 4 million

M&S App audience (000s)



M&S is also giving away 100 of its festive snowglobes, worth £20 each

ADVERTISMENT

COUPON CODES AVAILABLE GET CODES

NEWS POLITICS FOOTBALL CELEBS TV MONEY ROYALS

**M&S giving shoppers free advert calendars - with gin snowglobes and £1,000 inside**

The retailer has launched a digital advert calendar with special offers being given away every day in the run-up to Christmas, including hundreds of giftcards and light-up gin snowglobes



Source: UKOM Ipsos iris Online Audience Measurement Service

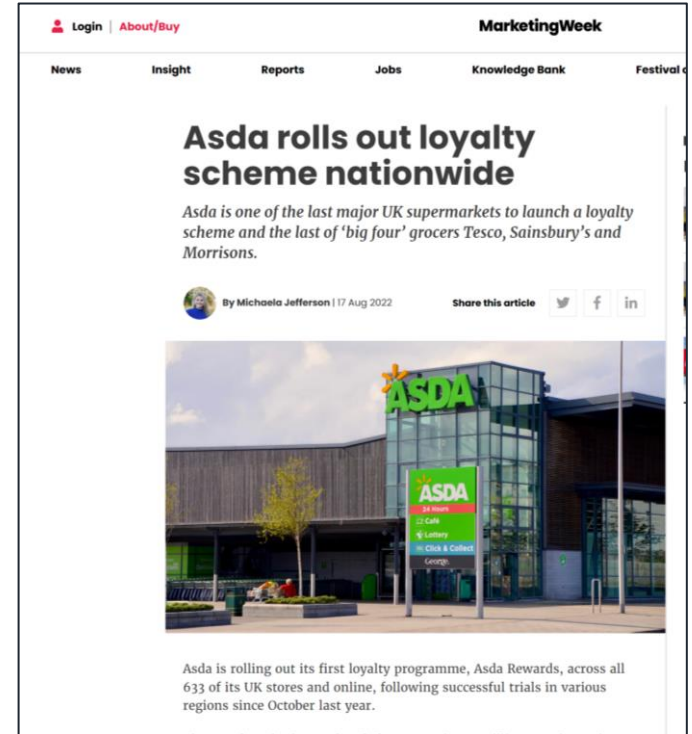
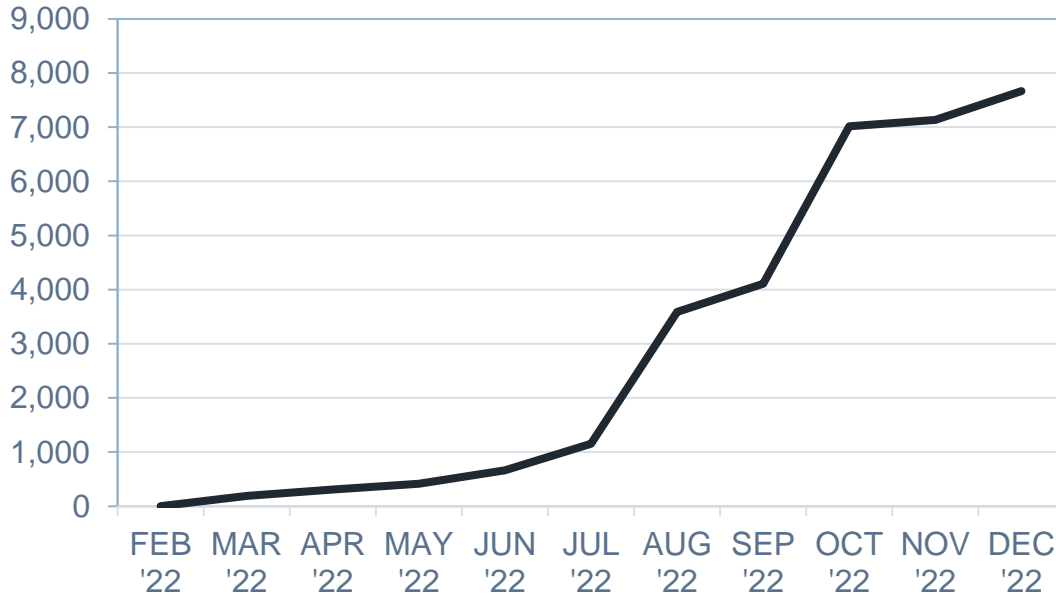
Base - All aged 15+ years using a PC, smartphone or tablet device(s). Mobile apps = apps across smartphone and tablet devices.

# Asda Rewards app: audience growth



App Audience has grown by 3.6m since September – 7.7 million used the app in December 22

### 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.

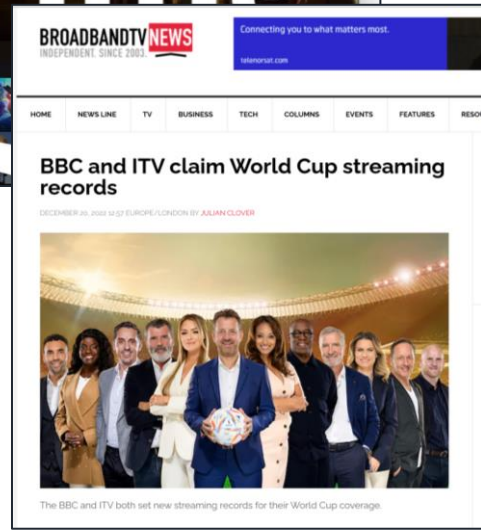
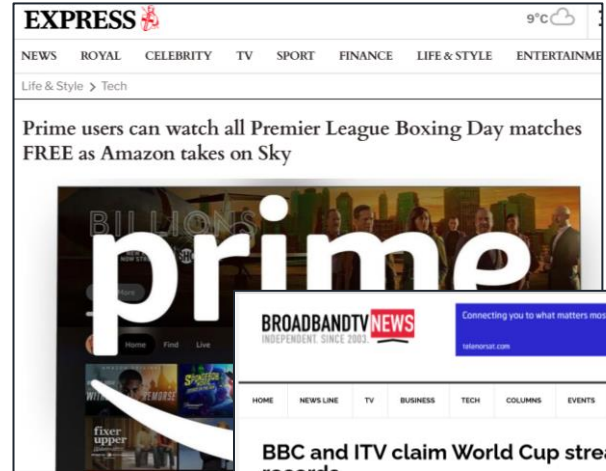
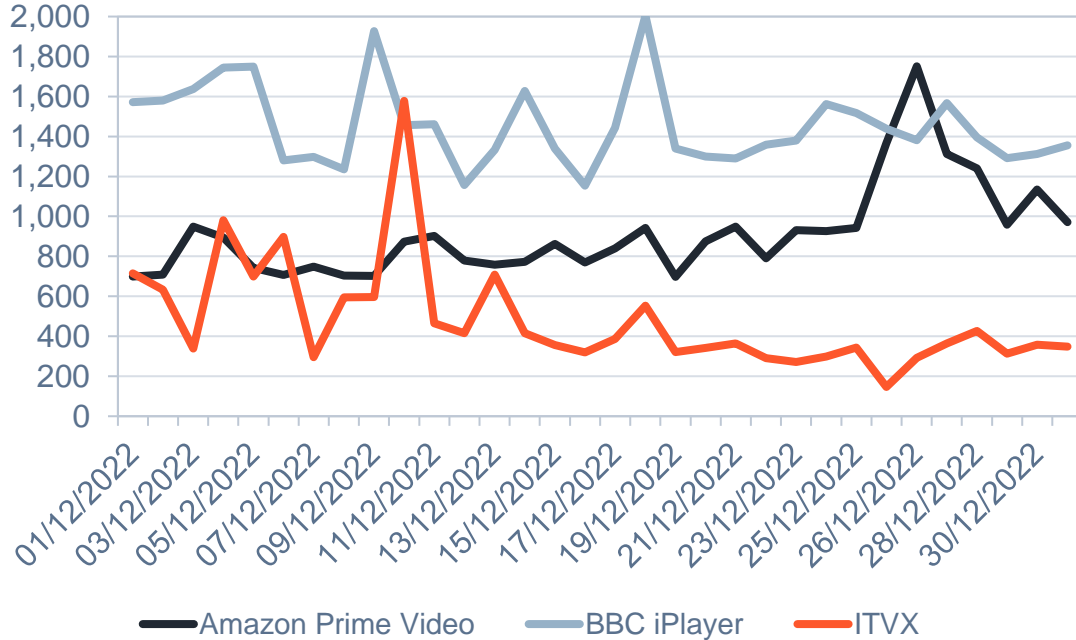


# Football drives uplift in TV apps in December

The World Cup on ITVX and BBC iPlayer and Premier league football on Amazon Prime drove peaks



### TV Mobile Apps - 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.

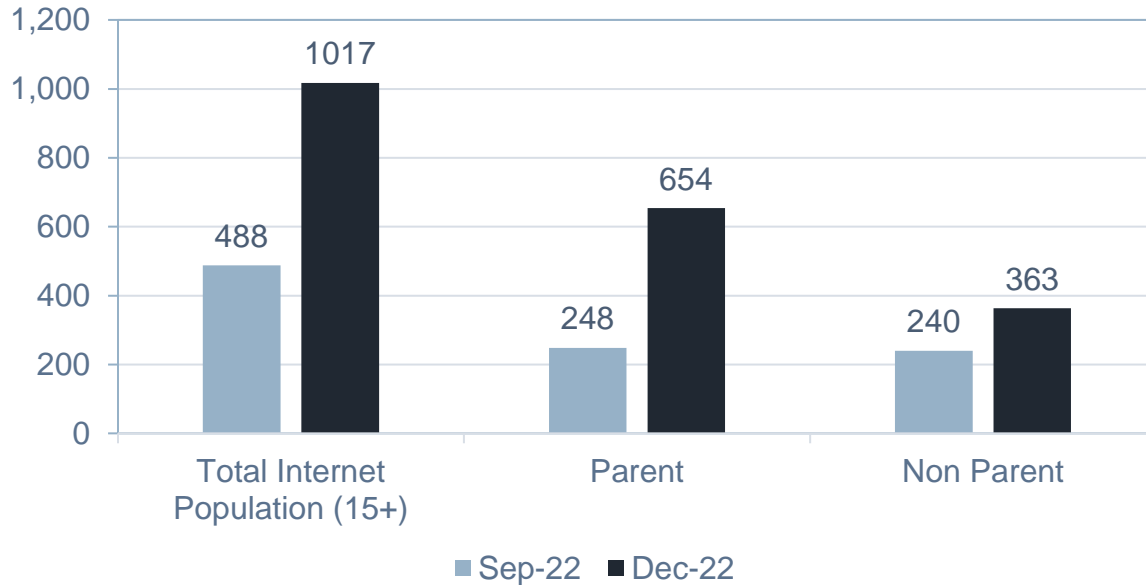


# NHS 111 website audience growth: Sep-Dec 2022



Usage of the NHS 111 service surpassed 1 million in December as strep A, covid, ambulance strikes and seasonal winter illnesses gripped the UK

## NHS 111 Website Audience (000s)



Source: UKOM Ipsos iris Online Audience Measurement Service

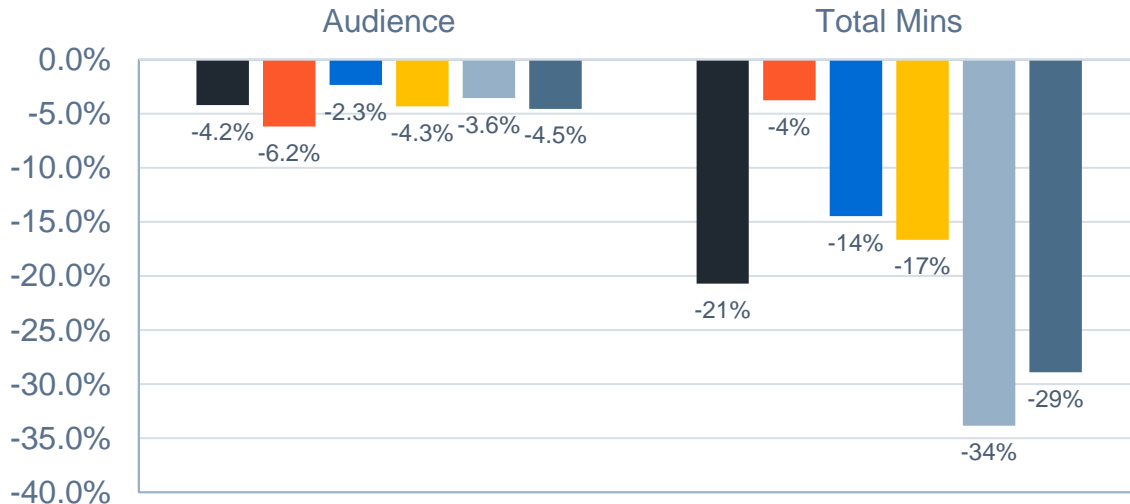
Base - All aged 15+ years using a PC, smartphone or tablet device(s). Mobile apps = apps across smartphone and tablet devices.

# Change in Twitter audience & minutes: Sep-Dec 2022



Twitter's audience was 1.2 million lower in December vs September and visitors spent on average 29 minutes less time on the platform leading to a 21% decline in minutes.

## Change in Twitter Audience & Total Minutes (%)



■ Total Internet Population (15+) ■ 15-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+



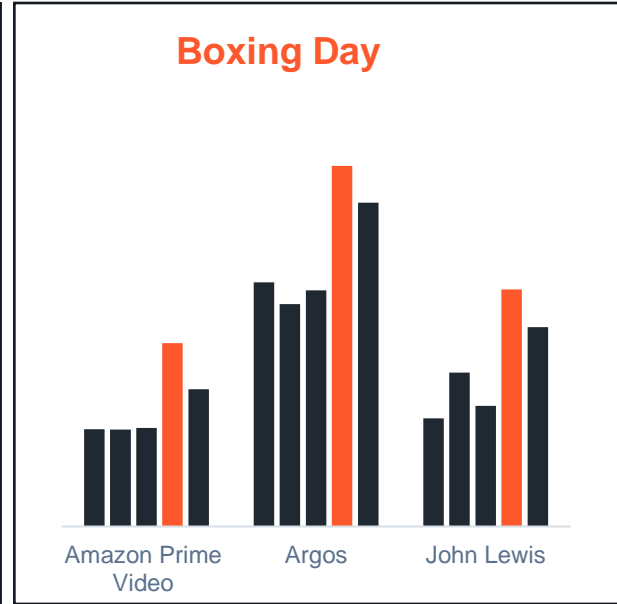
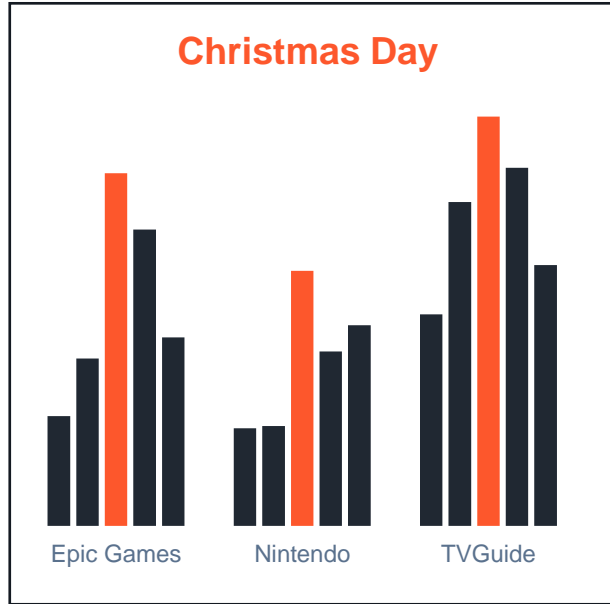
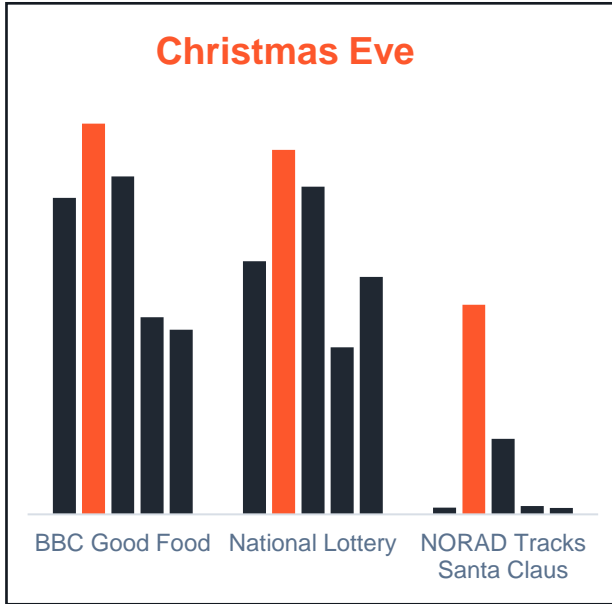
Source: UKOM Ipsos iris Online Audience Measurement Service

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

# Online audiences over Christmas



People's behaviour changes over the festive period e.g gaming on Christmas day but shopping on Boxing day



NB: The bars illustrate audience size and trends between 23<sup>rd</sup>-27<sup>th</sup> Dec with the orange bar representing the title of the chart. The brands within each chart can be compared but the charts are independent of each other (e.g. TV guide (chart 2) will be smaller than Argos (chart 3)).

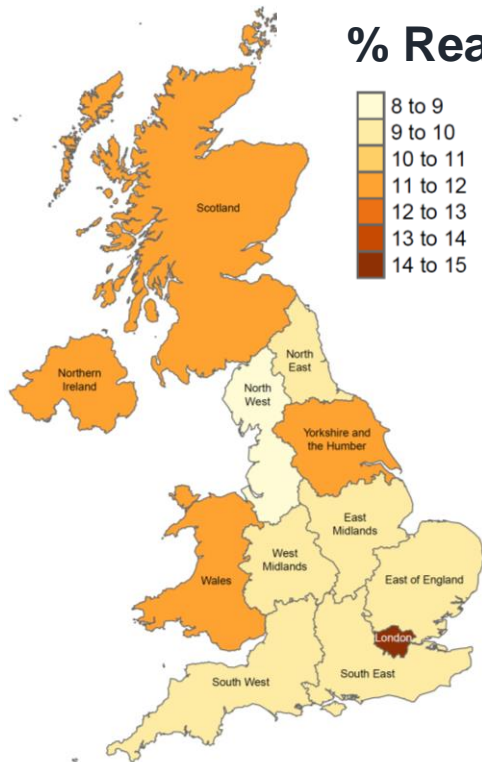


Source: UKOM Ipsos iris Online Audience Measurement Service, December 2022

Base - All aged 15+ years using a PC, smartphone or tablet device(s).

# Reach of online dating services by region

Londoners are much more likely than average to use online dating services



Reach of dating services in London & Top 5 services in the region		
	Audience Reach (%)	Audience Affinity Index
Dating Services – Total Internet	10.51	100
<b>Dating Services - London</b>	<b>14.44</b>	<b>137</b>
Tinder	7.03	141
Hinge	6.51	219
Bumble	4.86	157
Happn	1.73	308
Badoo	1.57	161

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

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

Geographical boundary data source: Office for National Statistics licensed under the Open Government Licence v.3.0. Contains OS data © Crown copyright and database right 2021. Contains NRS data © Crown copyright and database right 2021



# 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)

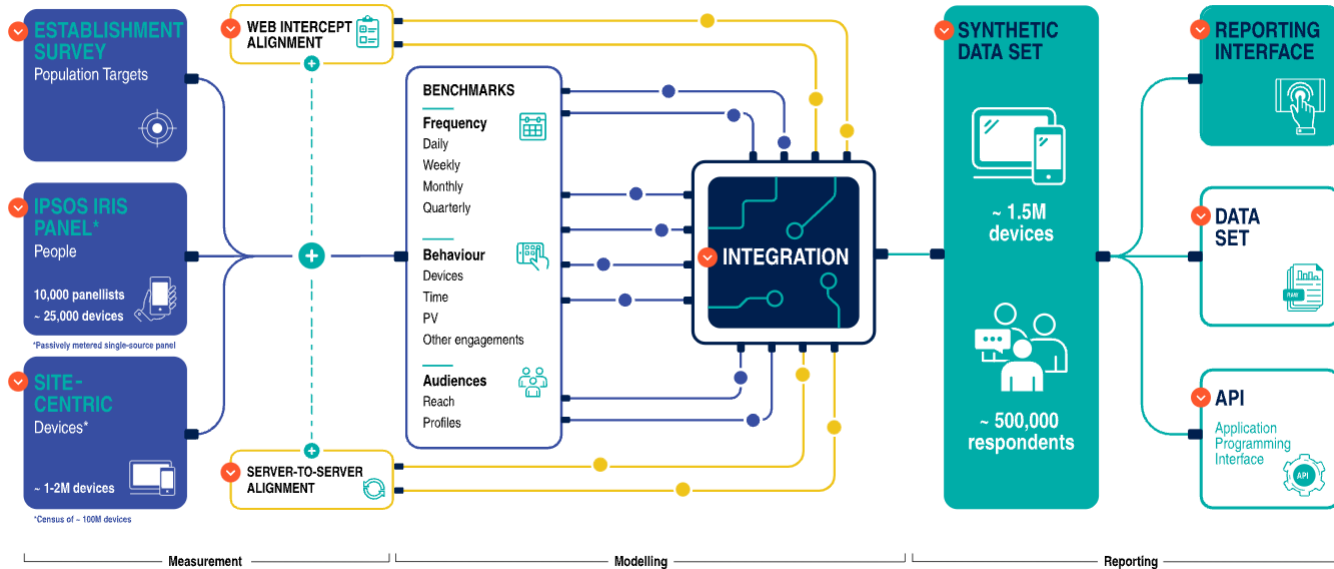
# Methodology



## 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 endorsed 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/>