

**UKOM**

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**Digital Market  
Overview**

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**March 2023**



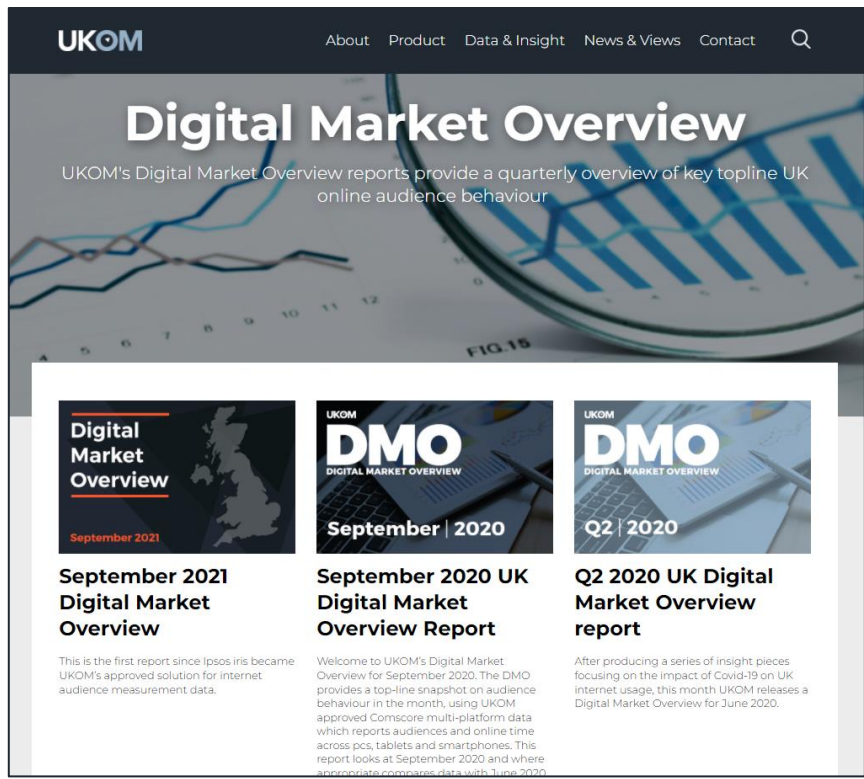
# The UK Digital Market Overview March 2023



This Digital Market Overview focuses on UK online audience on PC, tablet and smartphone in March 2023.

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.



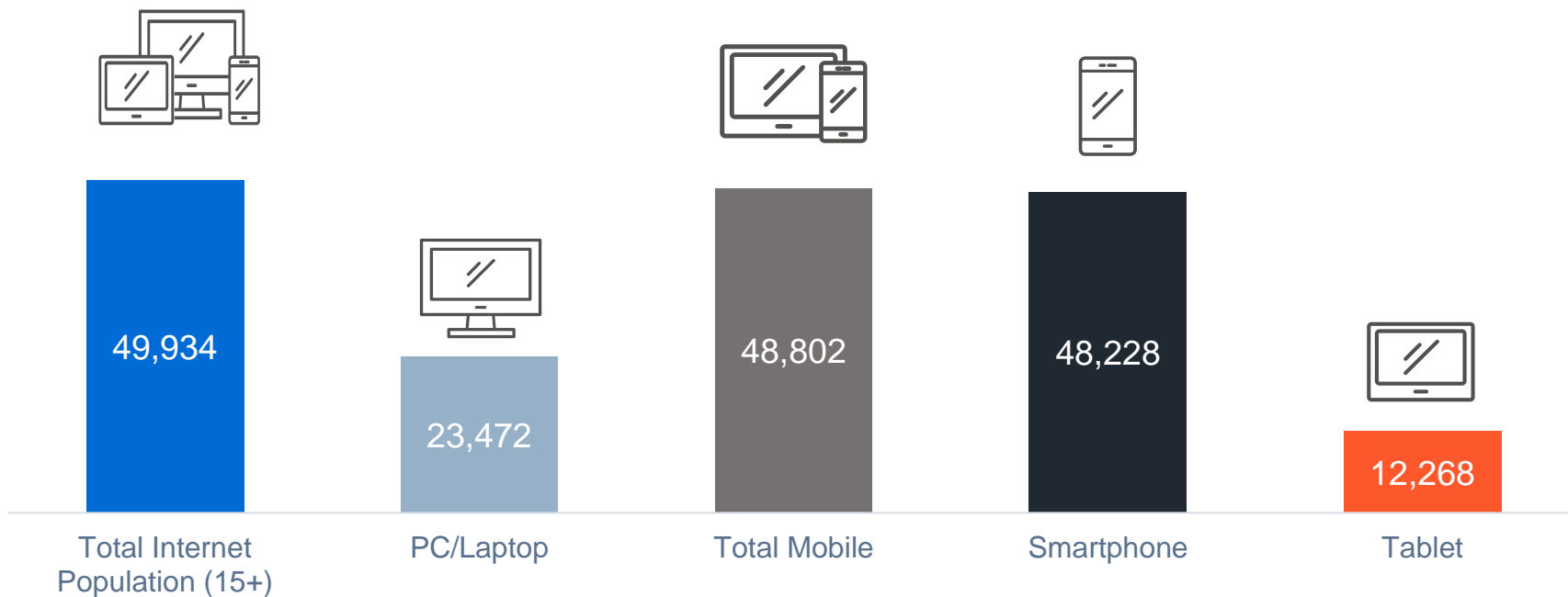
# Audience by device

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# Online audience by device (000s)

More than twice as many people use smartphones than computers



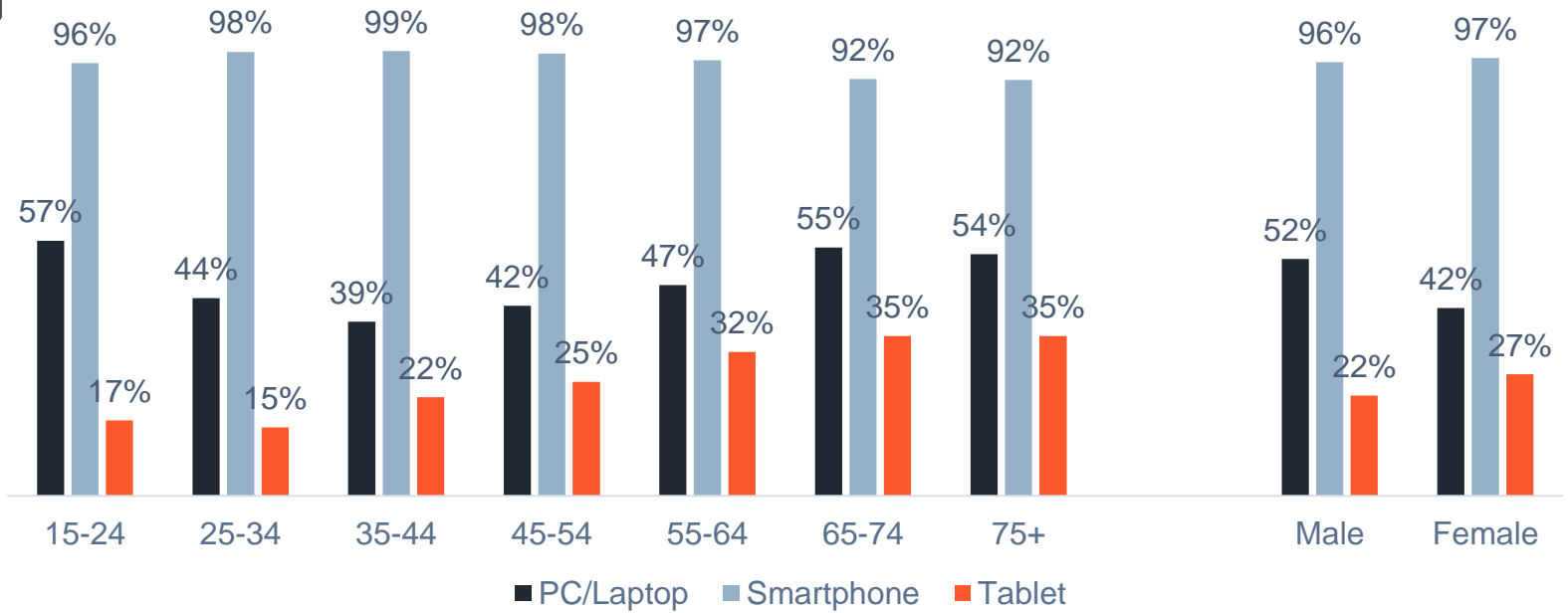
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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, Mar 2023  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

# Time online

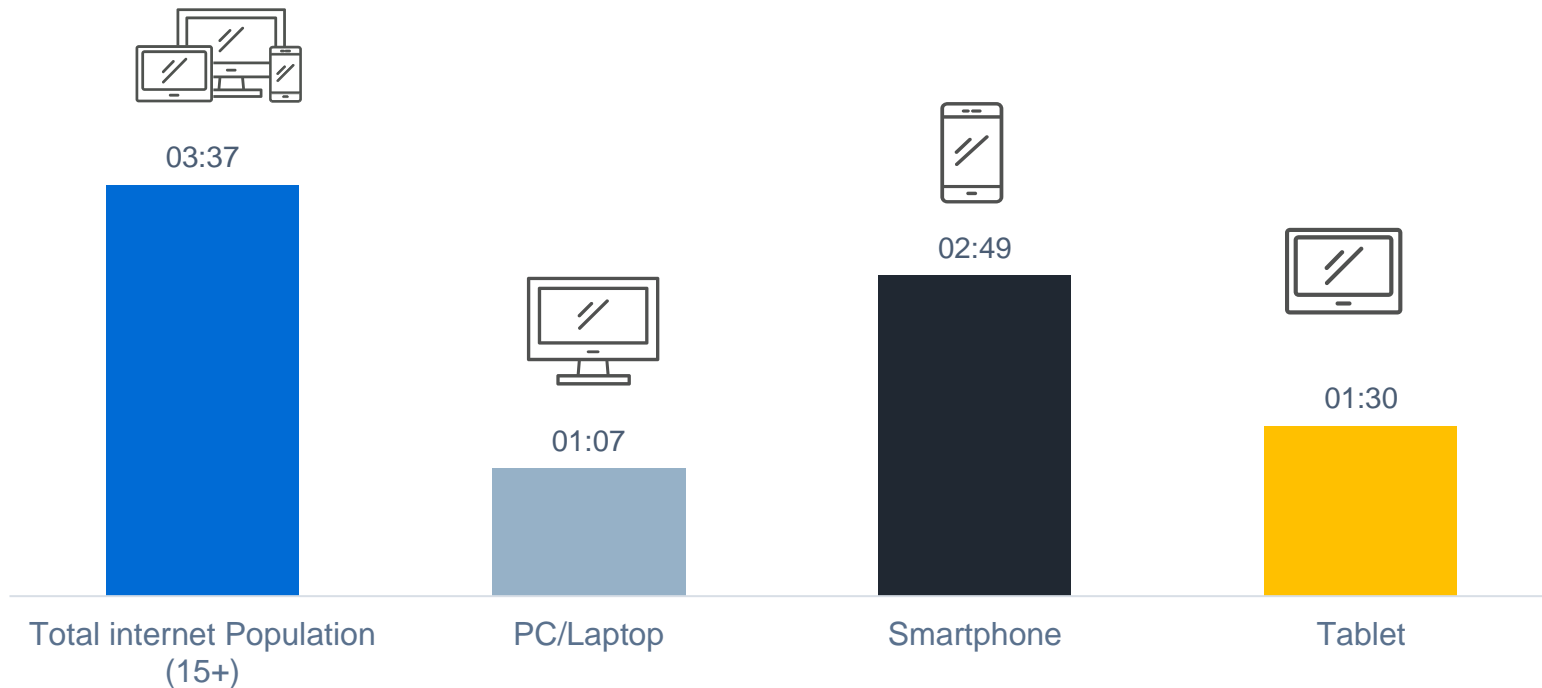
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# Average time spent online per day by device (hh:mm)



Smartphone users drive time online - they spend nearly 3 hrs a day using their device



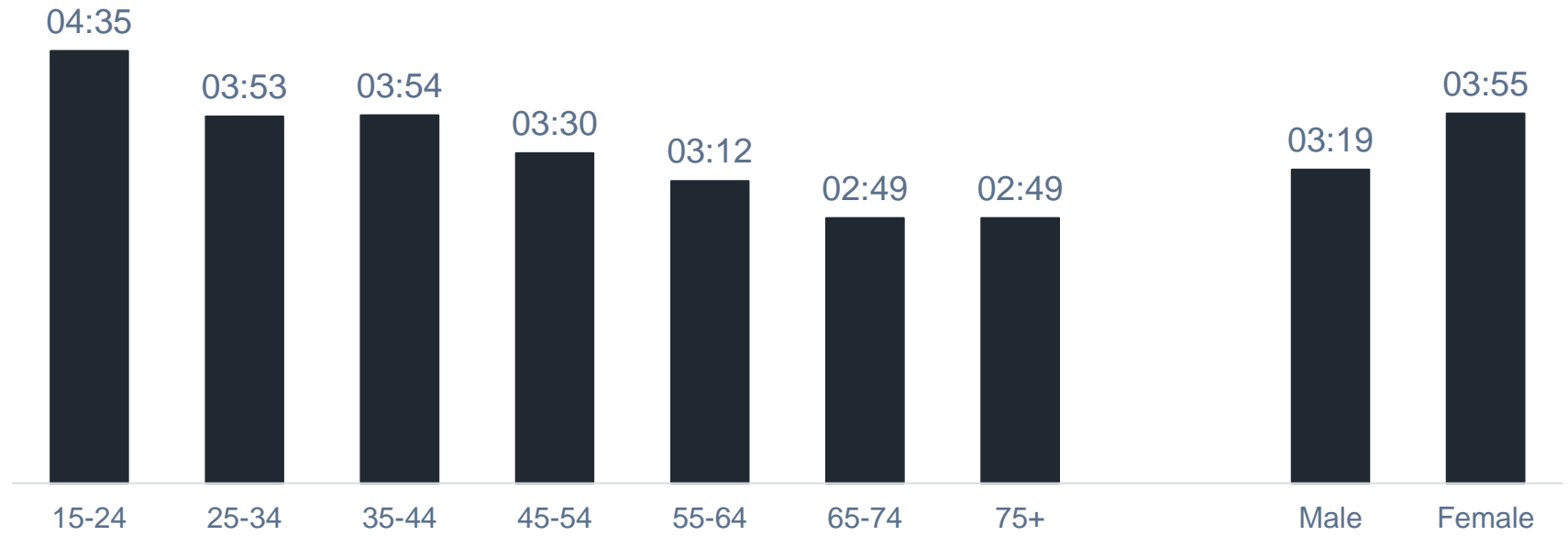
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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



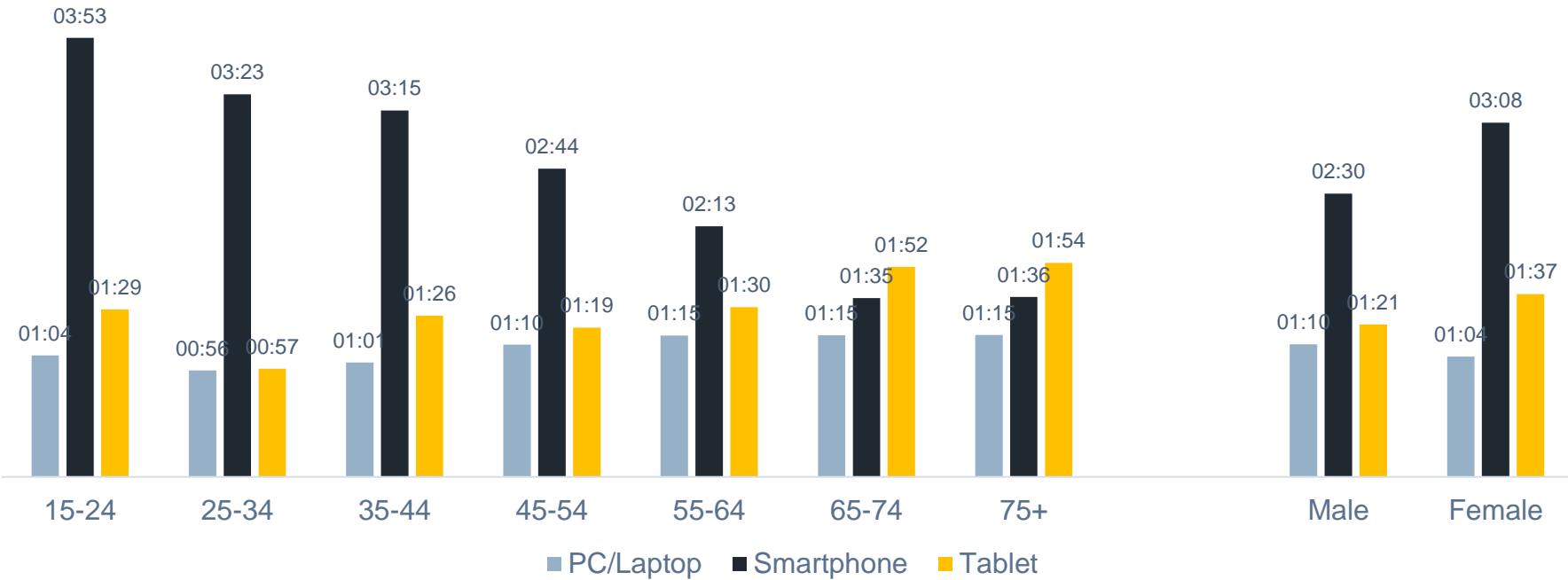
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



# Average time per day by device – age and gender (hh:mm)



Younger audiences spend most time on smartphones whilst 65+ spend longer on tablets



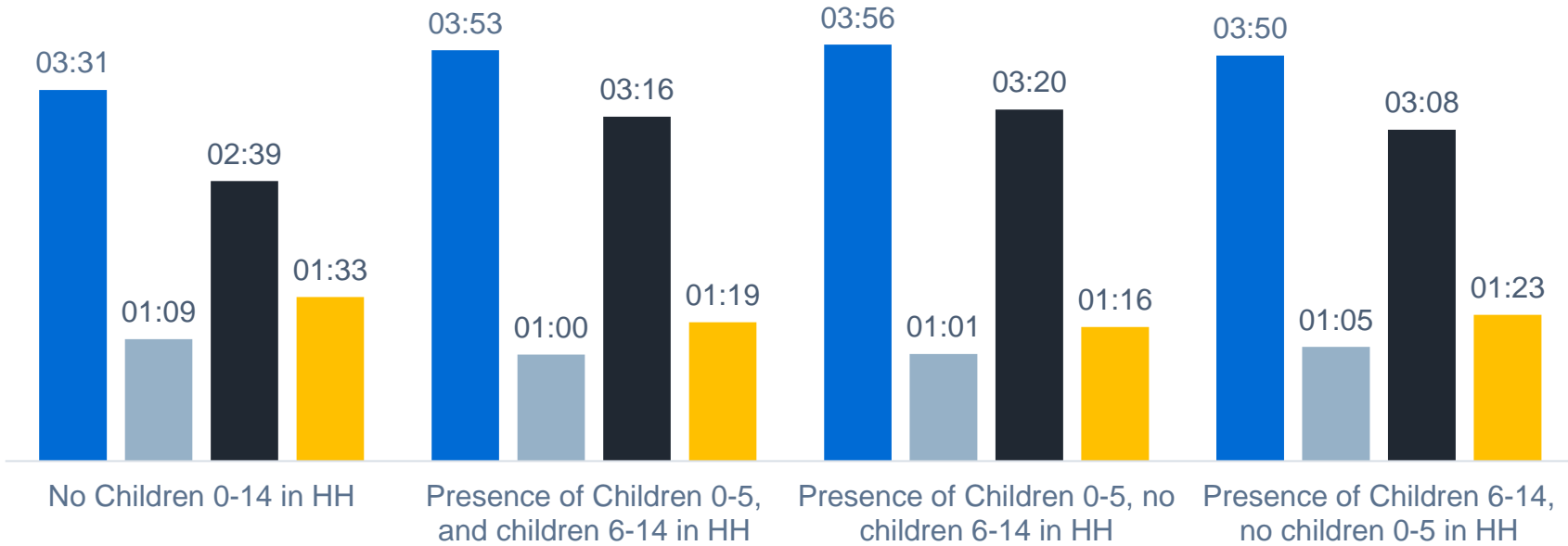
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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 – households with kids (hh:mm)



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



■ Total internet Population (15+)   ■ PC/Laptop   ■ Smartphone   ■ Tablet

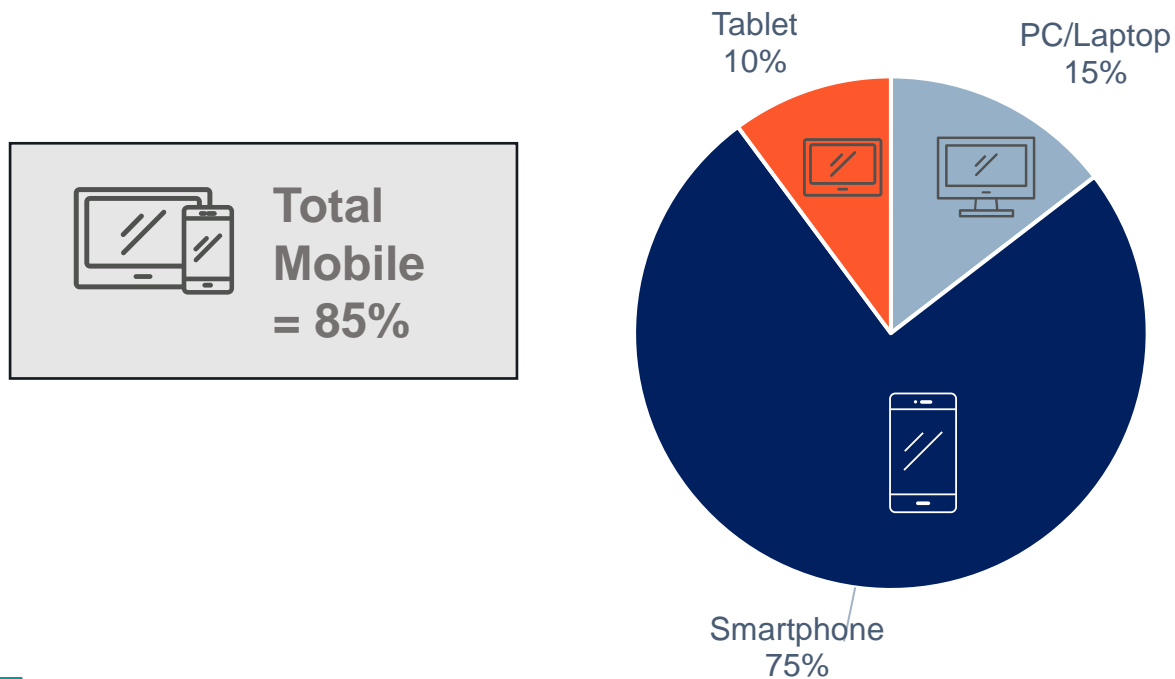


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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 75% of time online



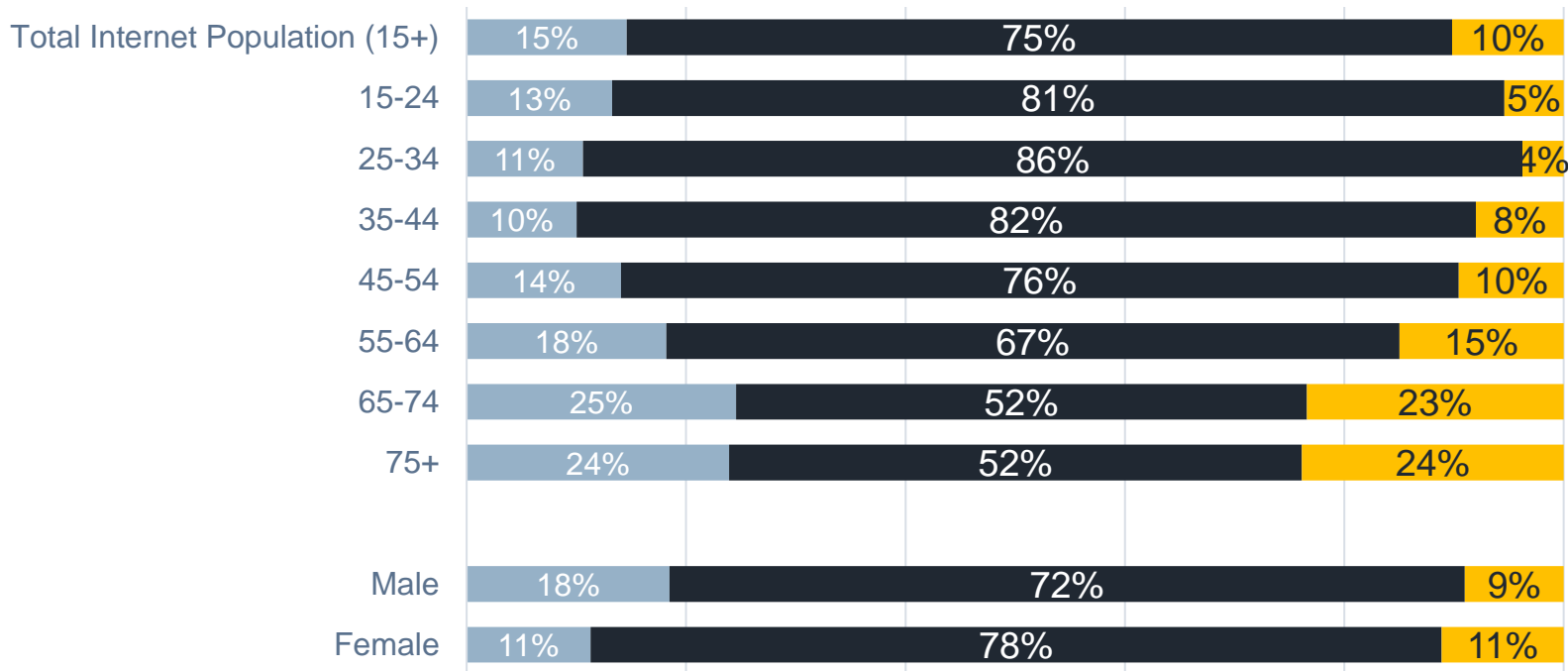
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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



■ PC/Laptop ■ Smartphone ■ Tablet

Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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



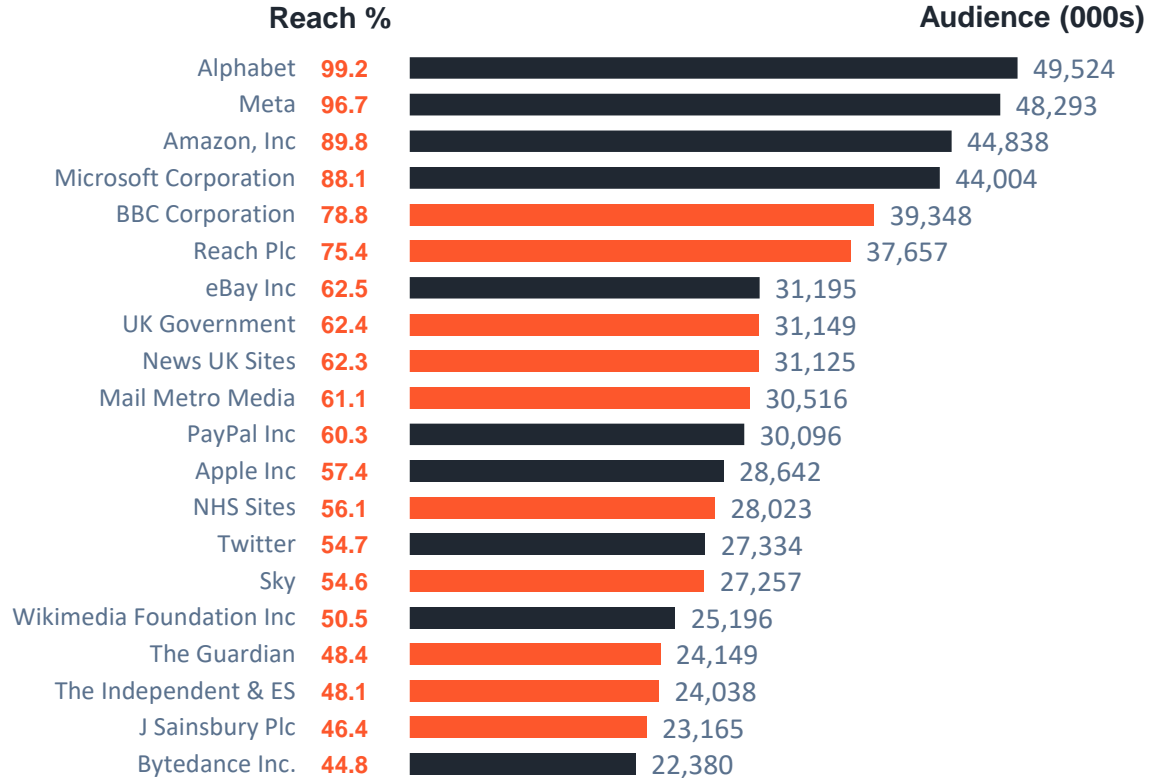
# Top organisations and brands

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# Top 20 organisations by audience

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



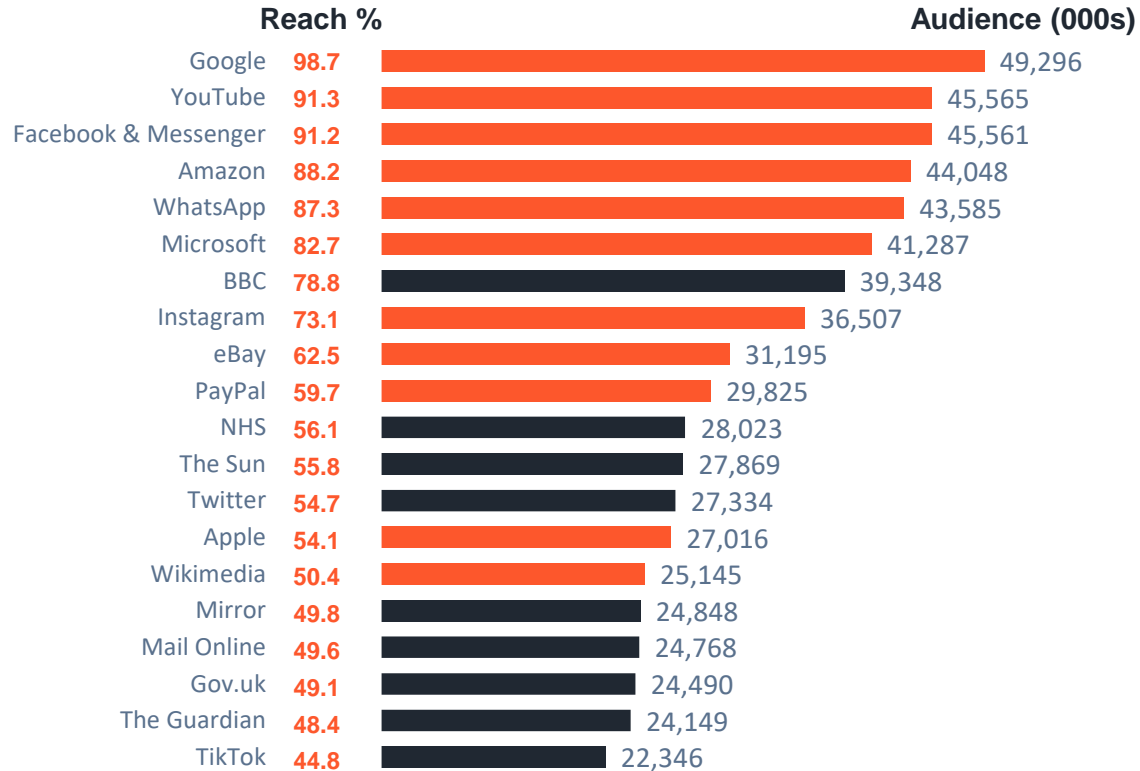
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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, Mar 2023

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



# Top 10 brands by audience & minutes



Social media brands dominate the top 10 for time

	Media	Audience (000s)	Audience Reach (%)
1	Google	49,296	98.7
2	YouTube	45,565	91.3
3	Facebook & Messenger	45,561	91.2
4	Amazon	44,048	88.2
5	WhatsApp	43,585	87.3
6	Microsoft	41,287	82.7
7	BBC	39,348	78.8
8	Instagram	36,507	73.1
9	eBay	31,195	62.5
10	PayPal	29,825	59.7

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	52,783	1158:31
2	YouTube	32,268	708:11
3	Google	25,923	525:52
4	TikTok	19,599	877:04
5	Instagram	15,571	426:31
6	WhatsApp	13,506	309:53
7	Snapchat	10,970	947:03
8	BBC	9,361	237:55
9	Amazon	8,171	185:30
10	Microsoft	6,163	149:17



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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'.



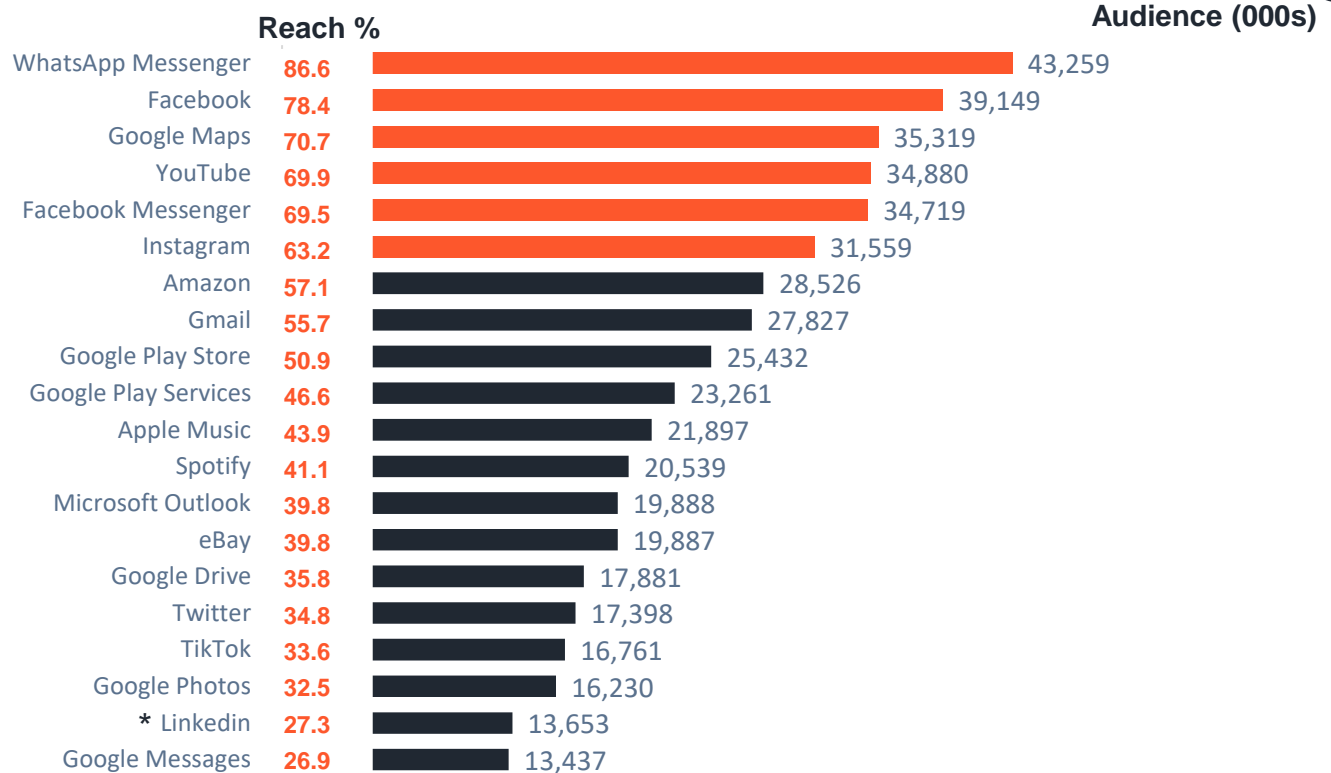
# Top mobile apps

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# 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, Mar 2023

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. \* An enhanced model was applied to the LinkedIn mobile app in data from Jan 23.



# 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	43,259	86.6
2	Facebook	39,149	78.4
3	Google Maps	35,319	70.7
4	YouTube	34,880	69.9
5	Facebook Messenger	34,719	69.5
6	Instagram	31,559	63.2
7	Amazon	28,526	57.1
8	Gmail	27,827	55.7
9	Google Play Store	25,432	50.9
10	Google Play Services	23,261	46.6

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	46,634	1191:12
2	YouTube	24,335	697:41
3	TikTok	19,541	1165:49
4	Instagram	15,253	483:18
5	WhatsApp Messenger	13,267	306:41
6	Snapchat	10,931	971:39
7	Google Maps	4,406	124:45
8	Gmail	3,715	133:31
9	Spotify	3,425	166:46
10	Facebook Messenger	2,810	80:56



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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'.

# 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	43,160	1133:43
2	TikTok	18,798	1160:32
3	YouTube	17,845	540:32
4	Instagram	14,763	484:42
5	WhatsApp Messenger	13,211	306:05
6	Snapchat	10,718	956:27
7	Google Maps	4,243	122:18
8	Gmail	3,255	119:39
9	Spotify	3,238	162:18
10	Reddit	2,597	315:51



## Tablet Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	<b>YouTube</b>	<b>6,490</b>	<b>1161:43</b>
2	Facebook	3,474	643:24
3	<b>Netflix</b>	<b>746</b>	<b>284:18</b>
4	<b>TikTok</b>	<b>743</b>	<b>701:01</b>
5	<b>BBC iPlayer</b>	<b>720</b>	<b>293:17</b>
6	Instagram	490	163:38
7	<b>YouTube Kids</b>	<b>483</b>	<b>1284:06</b>
8	<b>ITVX</b>	<b>469</b>	<b>365:12</b>
9	Gmail	460	145:11
10	BBC News	423	205:26



Source: Ipsos, Ipsos iris Online Audience Measurement Service, Mar 2023

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'.

# Category usage & trends

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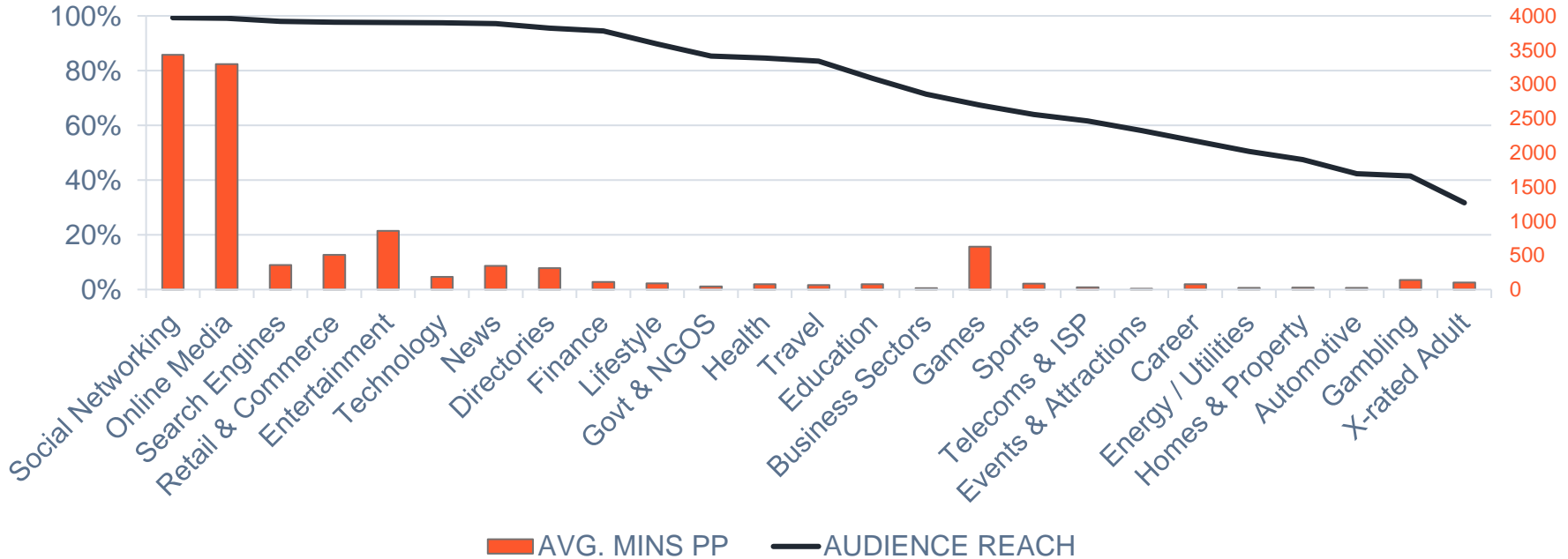
# Reach & avg. mins pp by tier 1 category – Mar 23



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

## Reach

Avg. mins PP per month



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

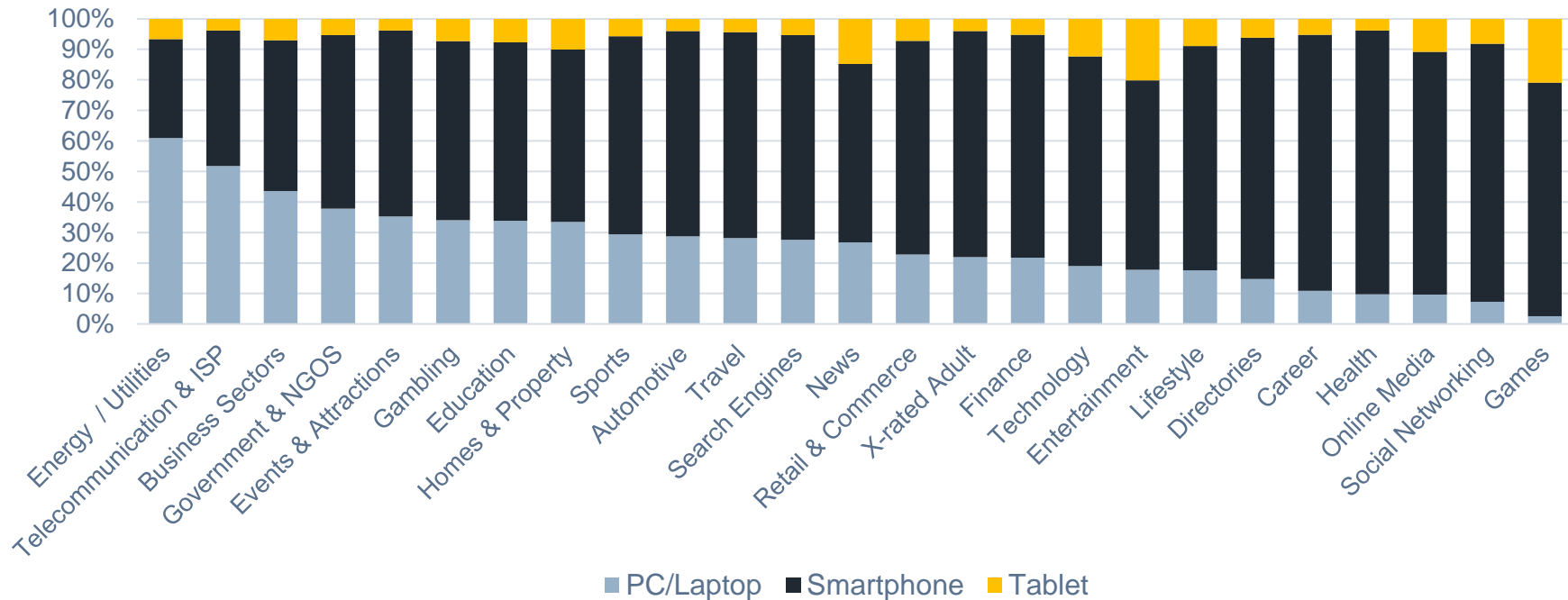
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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.



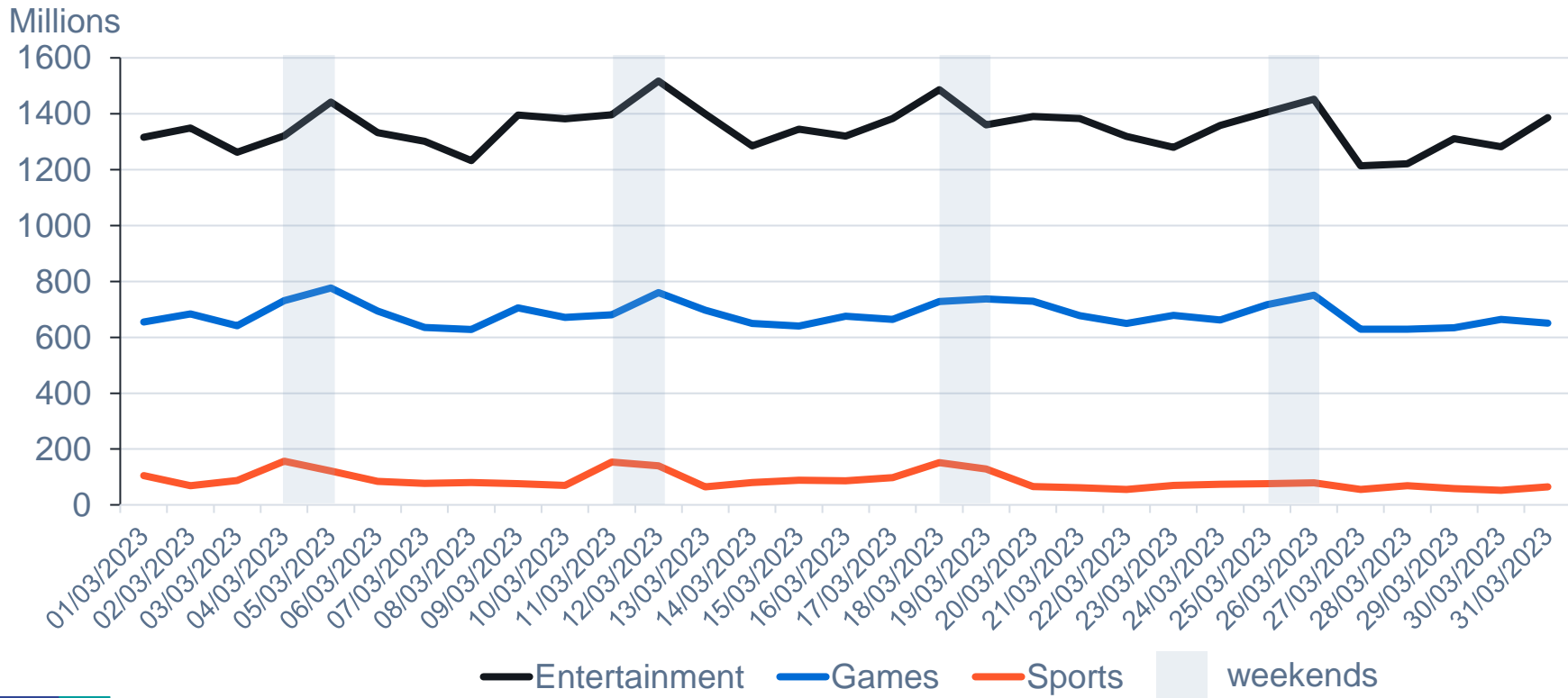
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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'

# Category minutes by day – weekend peaks

Time spent on entertainment, gaming and sports content peaks at weekends



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

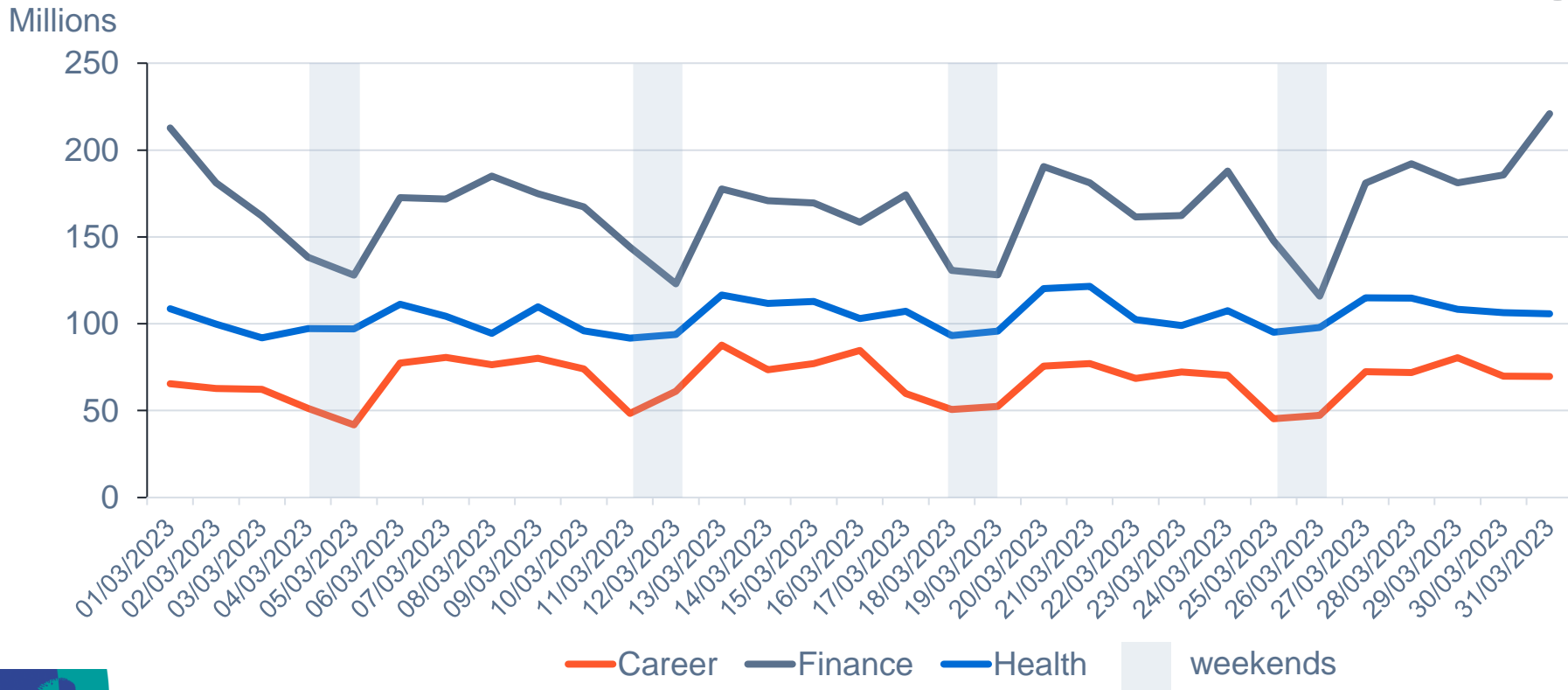
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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



# Category minutes by day – weekend troughs

Time spent within the career, finance and health categories dips at the weekend



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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'



# Key changes: Dec 22 - Mar 23

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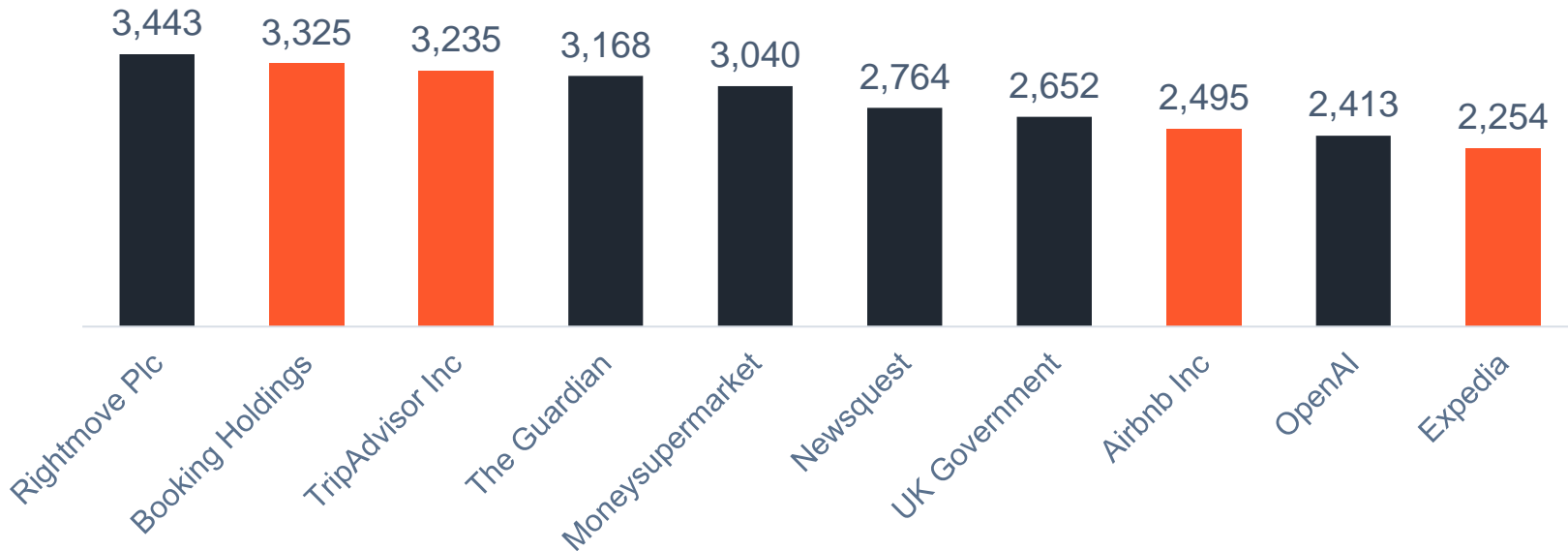


# Organisations adding most audience: Dec 22 - Mar 23



After Christmas, attention turns to holidays

ABS Audience growth (+000s)



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

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

# Online brands adding most audience: Dec 22 - Mar 23



RightMove added most audience but OpenAi (ChatGPT) was one of the fastest growing online services

	AUDIENCE (000s)			
	DEC '22	MAR '23	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	49,931	49,934	0.0 %↑	4
Rightmove	12,152	15,595	28.3 %↑	3,443
Booking.com	11,441	14,858	29.9 %↑	3,416
Gov.uk	21,114	24,490	16.0 %↑	3,376
Tripadvisor	12,919	16,155	25.0 %↑	3,235
The Guardian	20,981	24,149	15.1 %↑	3,168
Microsoft	38,434	41,287	7.4 %↑	2,853
Airbnb	5,412	7,907	46.1 %↑	2,495
OpenAI	1,346	3,759	179.3 %↑	2,413
MoneySavingExpert	12,482	14,829	18.8 %↑	2,347
*JP Morgan	1,441	3,778	162.1 %↑	2,337



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month \* A new iOS app was reported for the first time in this quarter Q1 23

# Mobile Apps adding >1 million audience: Dec 22 - Mar 23



Tesco customers moved from Clubcard to the new combined Tesco Grocery & Clubcard app

	AUDIENCE (000s)			
	DEC '22	MAR '23	Change (%)	Change (abs)
<b>TOTAL INTERNET POPULATION (15+)</b>	49,931	49,934	0.0 %↑	4
Tesco Grocery & Clubcard	9,263	12,030	29.9 %↑	2,767
*Chase UK	1,441	3,683	155.6 %↑	2,242
Lloyds Mobile Banking	4,192	6,076	44.9 %↑	1,883
Too Good To Go	5,775	7,553	30.8 %↑	1,778
Booking.com	4,732	6,366	34.5 %↑	1,634
**Linkedin	12,201	13,653	11.9 %↑	1,451
Vinted	6,307	7,706	22.2 %↑	1,398
Microsoft OneDrive	8,352	9,620	15.2 %↑	1,268
Office (Microsoft 365)	5,840	6,985	19.6 %↑	1,145
Airbnb	2,508	3,586	43.0 %↑	1,078
Trainline	8,488	9,490	11.8 %↑	1,002



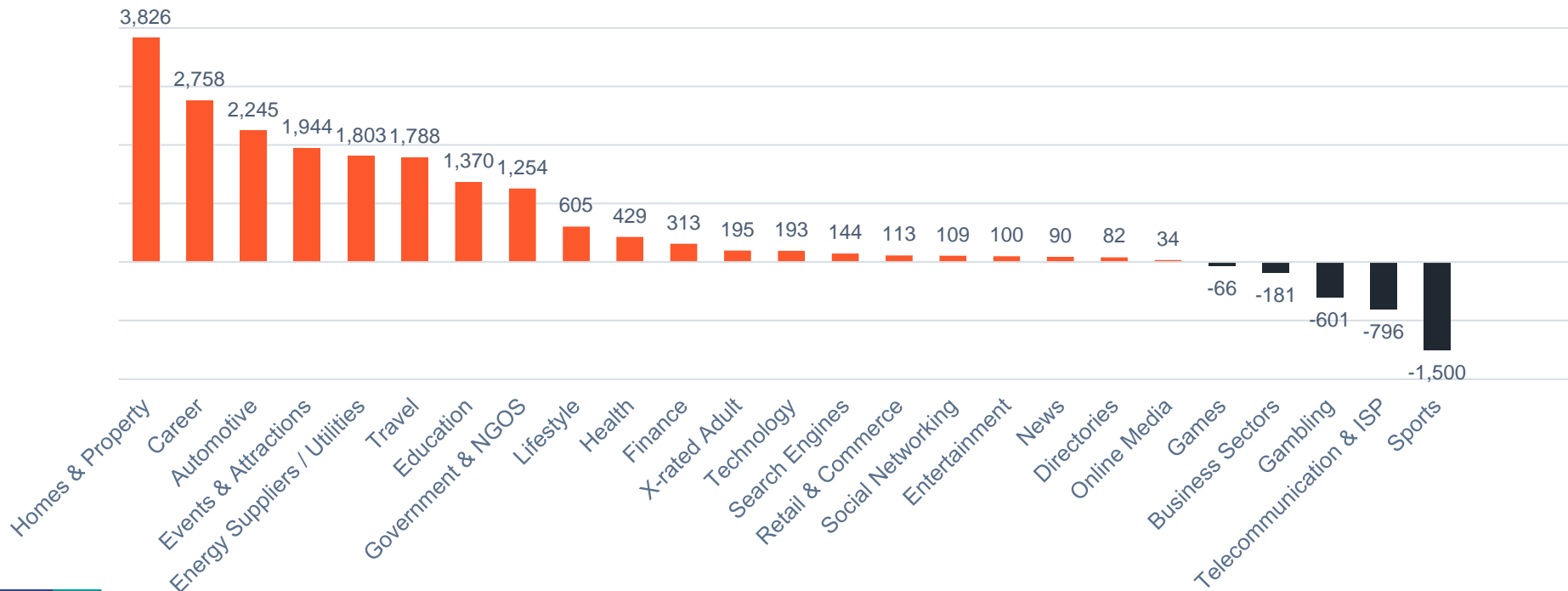
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month, Mobile apps = apps across smartphone and tablet devices. \* A new iOS app was reported for the first time in this quarter Q1 23 for Chase UK. \*\* An enhanced model was applied to the LinkedIn mobile app in data from Jan 23

# Category audience change (000s): Dec 22 - Mar 23



Attention turns to house and job hunting at the start of the year. Sport's decline is due to football losing audience after the World Cup peak in December



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

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

# Property and career categories - audience (000s)



At the start of the year people focus on house and job hunting – the top 5 brands within the categories all experienced audience uplifts. The market leaders, Rightmove and LinkedIn increased most

Homes and Property audience (000s)				
	DEC '22	MAR '23	Change (%)	Change (abs)
Category Total	19,909	23,735	19.2 %↑	3,826
Rightmove	12,152	15,595	28.3 %↑	3,443
OnTheMarket	2,142	3,364	57.1 %↑	1,222
Zoopla	6,054	7,127	17.7 %↑	1,073
Homes and Gardens	838	1,615	92.8 %↑	777
PrimeLocation	1,120	1,630	45.6 %↑	510

Career audience (000s)				
	DEC '22	MAR '23	Change (%)	Change (abs)
Category Total	24,357	27,115	11.3 %↑	2,758
**LinkedIn	19,161	21,453	12.0 %↑	2,293
Indeed	6,434	7,930	23.3 %↑	1,496
Reed	1,412	1,991	41.0 %↑	579
Glassdoor	2,131	2,533	18.9 %↑	403
Totaljobs Group	1,893	2,253	19.0 %↑	360



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. \*\* An enhanced model was applied to the LinkedIn mobile app in data from Jan 23

# Automotive brands - audience (000s)



In line with industry news, visits to automotive brand sites were up in March, with Volvo adding most audience compared to December

Automotive brands audience (000s)				
	DEC '22	MAR '23	Change (%)	Change (abs)
<b>Total Category</b>	<b>5,728</b>	<b>7,473</b>	<b>30.5 %↑</b>	<b>1,745</b>
Volvo	313	630	101.6 %↑	318
Peugeot	163	355	117.2 %↑	192
Toyota	571	758	32.8 %↑	187
BMW	641	827	28.9 %↑	186
Citroen	222	404	81.9 %↑	182
Tesla	205	374	82.5 %↑	169
Vauxhall	262	417	59.1 %↑	155
Seat	92	226	146.7 %↑	134
Kia	349	479	37.1 %↑	130
Volkswagen	518	641	23.7 %↑	123

## UK car sales rise by a quarter as industry recovers from chip shortage

Registrations hit 74,400 in seventh successive month of growth, with electric cars accounting for 16.5%



📷 The Tesla Model Y was the only battery electric vehicle to make the top 10 bestsellers list. Photograph: Reuters

The number of cars sold in the UK increased by 26% year on year in February, the seventh successive month of growth as the industry recovers from the [depths of the global computer chips shortage](#).

UK new car registrations rose by 26.2% in February to 74,400, according to data published on Monday by the Society of Motor Manufacturers and Traders (SMMT), a lobby group.



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

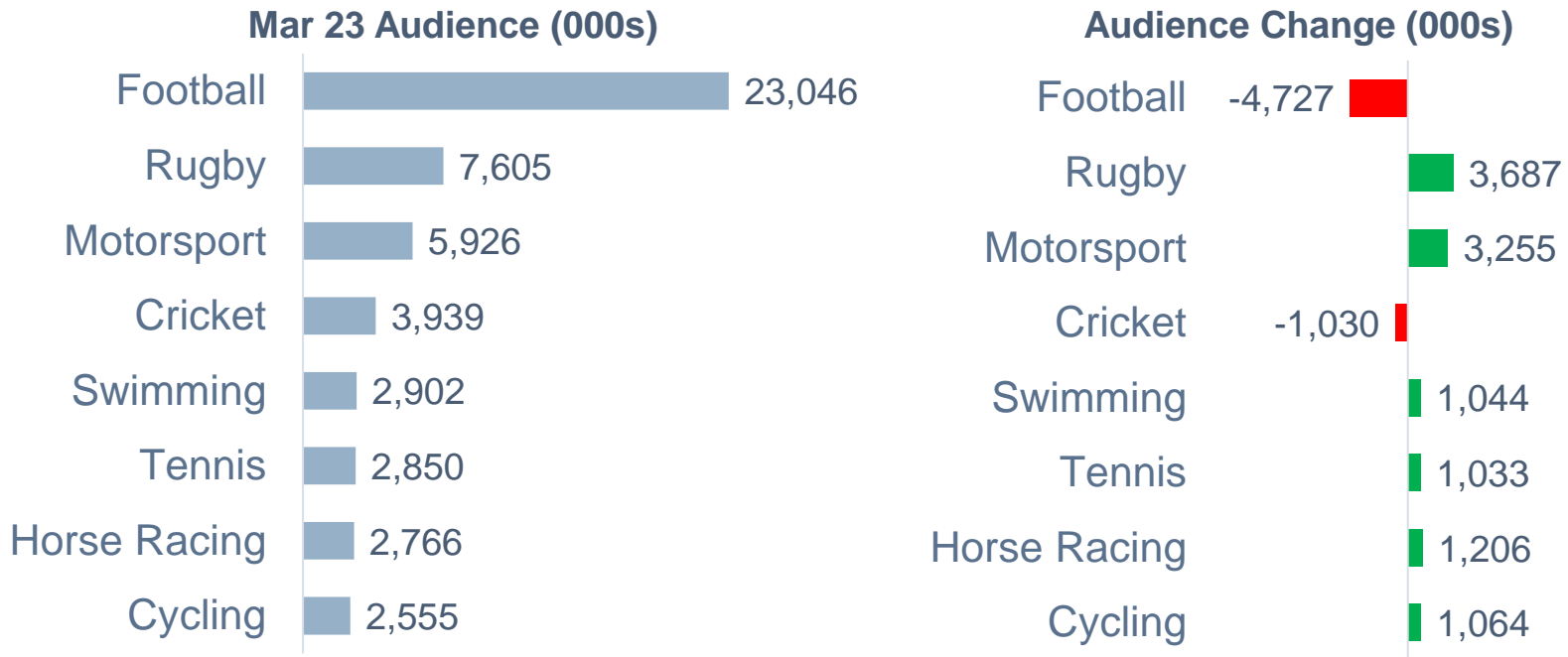
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



# Sports audience change (000s): Dec 22 - Mar 23



Although football's audience declined after peaking in December due to the World Cup, the start of the F1 season and Six Nations drove uplifts of over 3 million for rugby and motorsport.



Source: UKOM Ipsos iris Online Audience Measurement Service

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



# In the News

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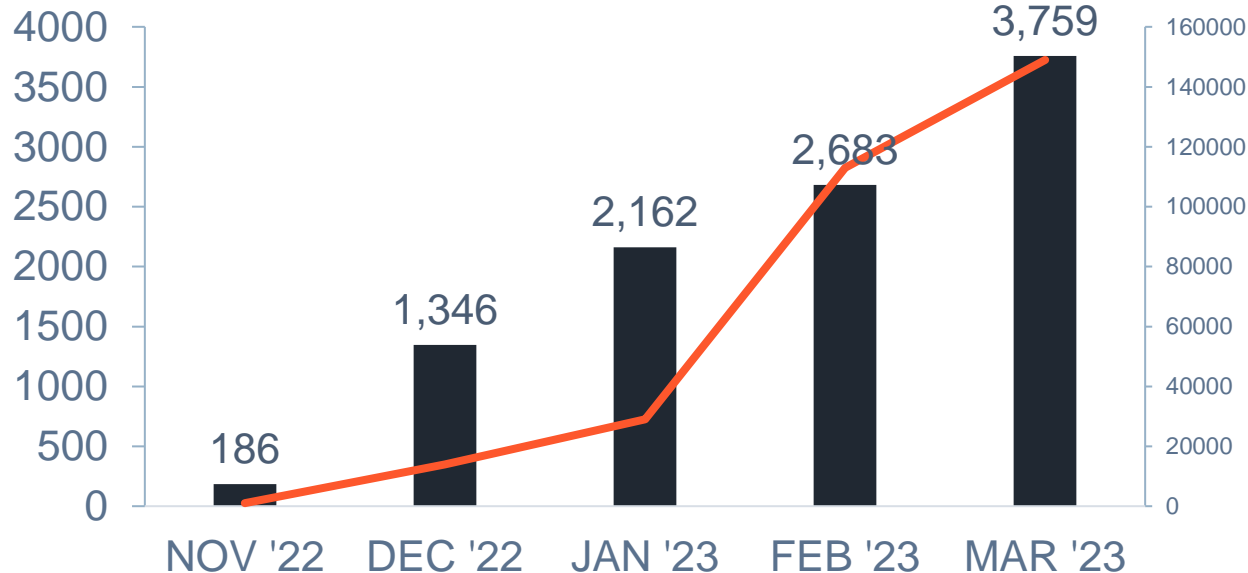
# OpenAI (ChatGPT) usage by month – audience and time



Over 3.7 million people visited OpenAI (ChatGPT) in Mar 2023

Audience (000s)

Minutes (000s)

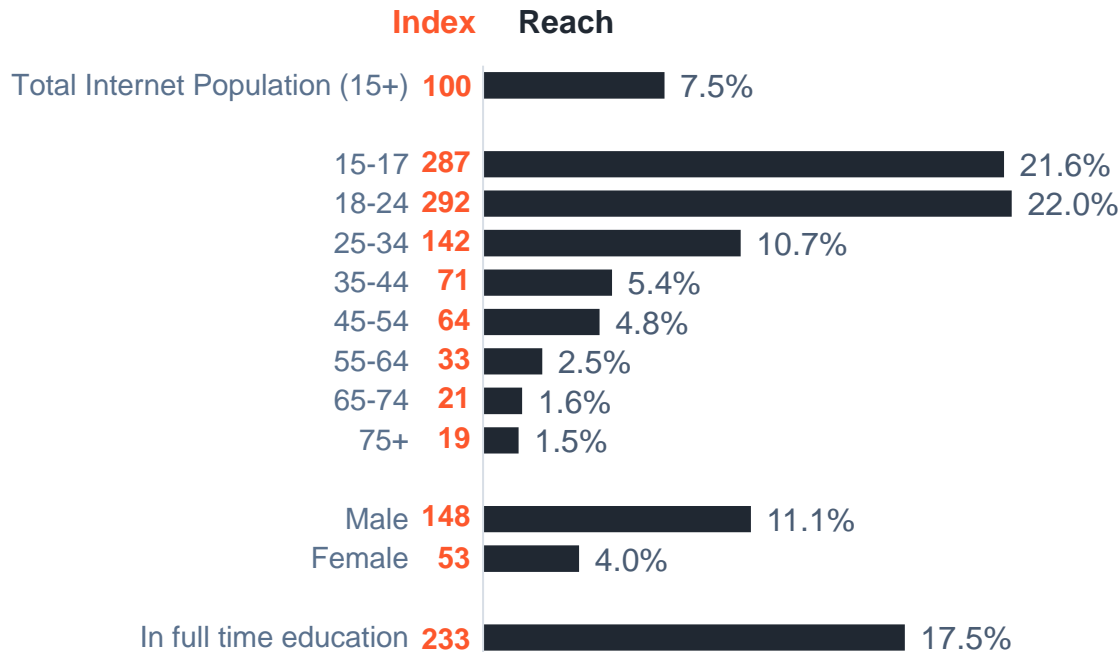


Source: UKOM Ipsos iris Online Audience Measurement Service, Nov 22 – Mar 23  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

# OpenAI (ChatGPT) reach by audience



<25s, males and students are most likely to have explored the website



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 23  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

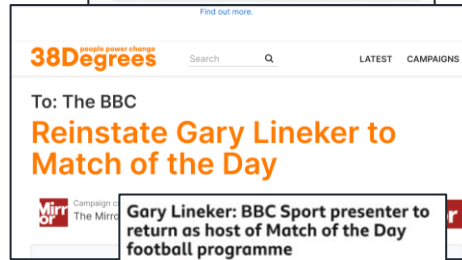
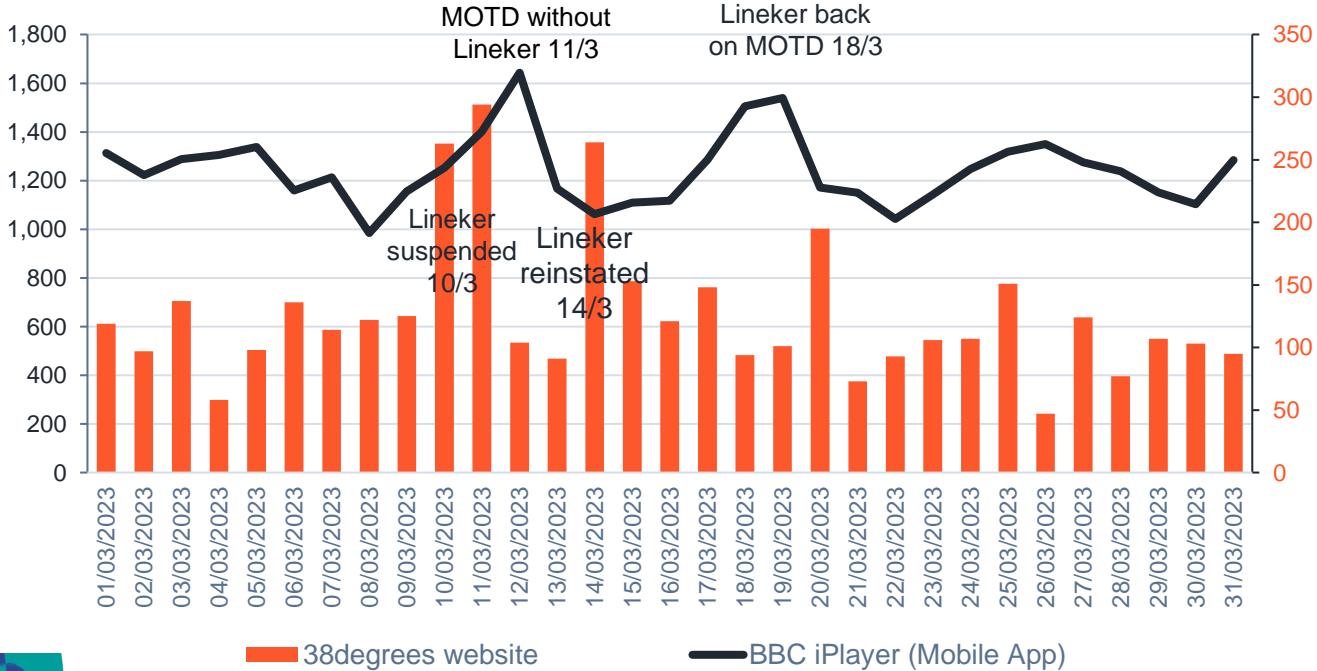
# BBC iPlayer and 38 degrees.co.uk audience (000s)



Lineker controversy contributed to BBC iPlayer app uplifts. The Mirror's petition to reinstate him drove people to the 38 degrees website.

BBC iPlayer (000s)

38 degrees (000s)



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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

# Change.org audience by day (000s)



The independent's petition to block Boris giving his father a knighthood drove traffic to Change.org on March 7th



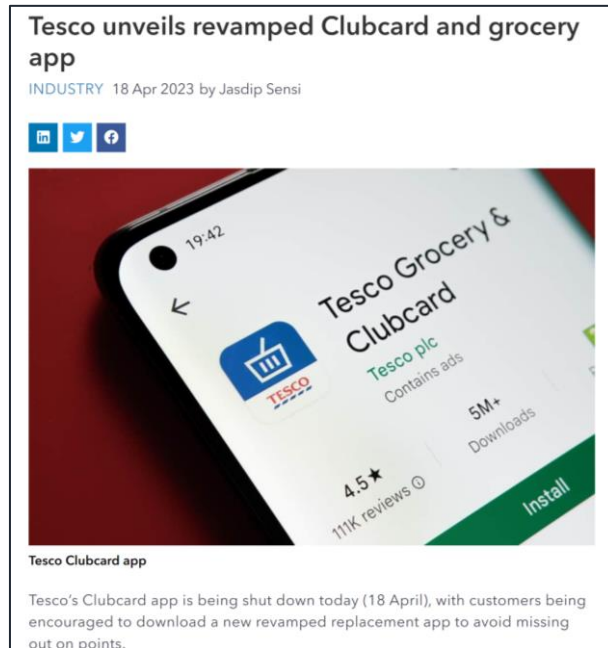
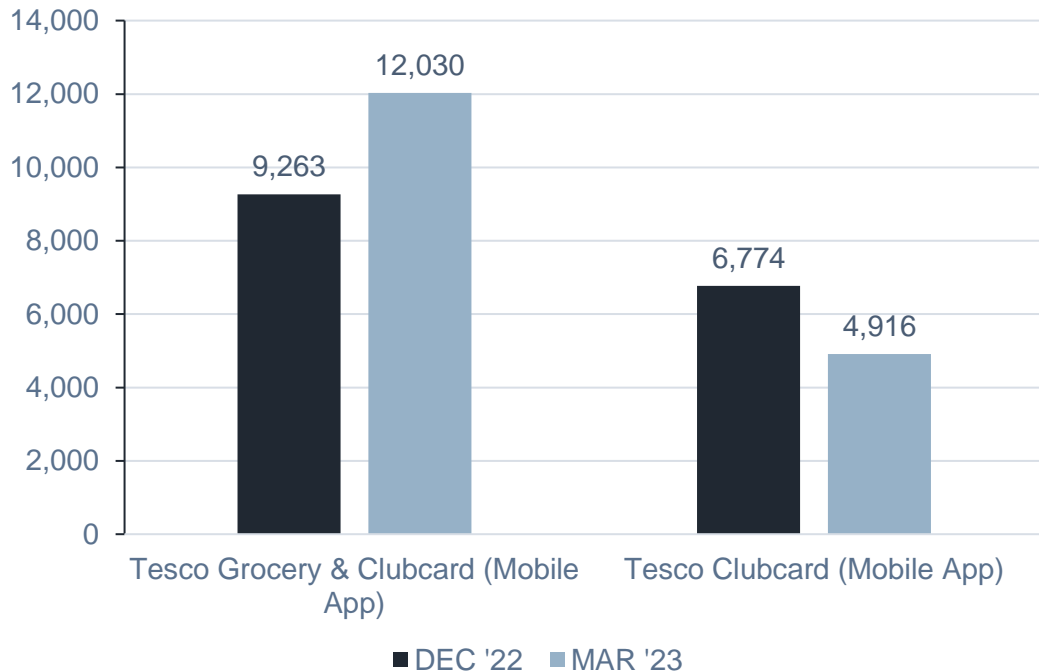
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2023

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

# Tesco Clubcard audience Dec 22 – Mar 23



After Tesco announced the closure of its Clubcard app, customers switched to the revamped Tesco Grocery & Clubcard app

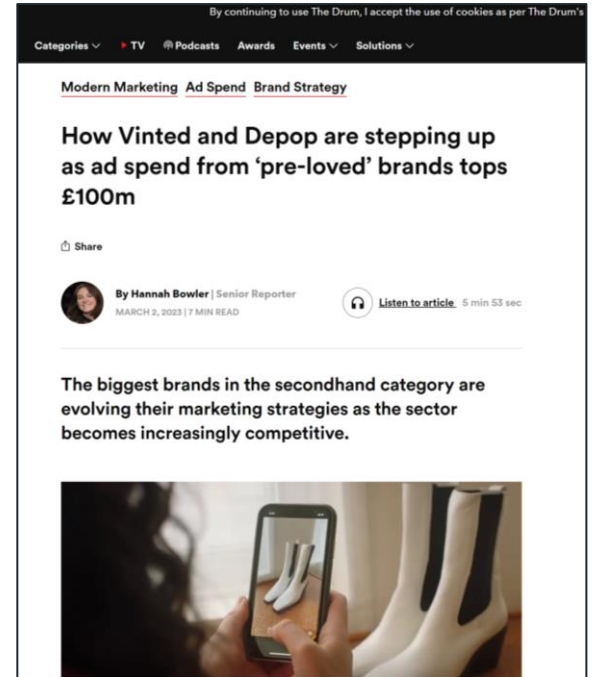
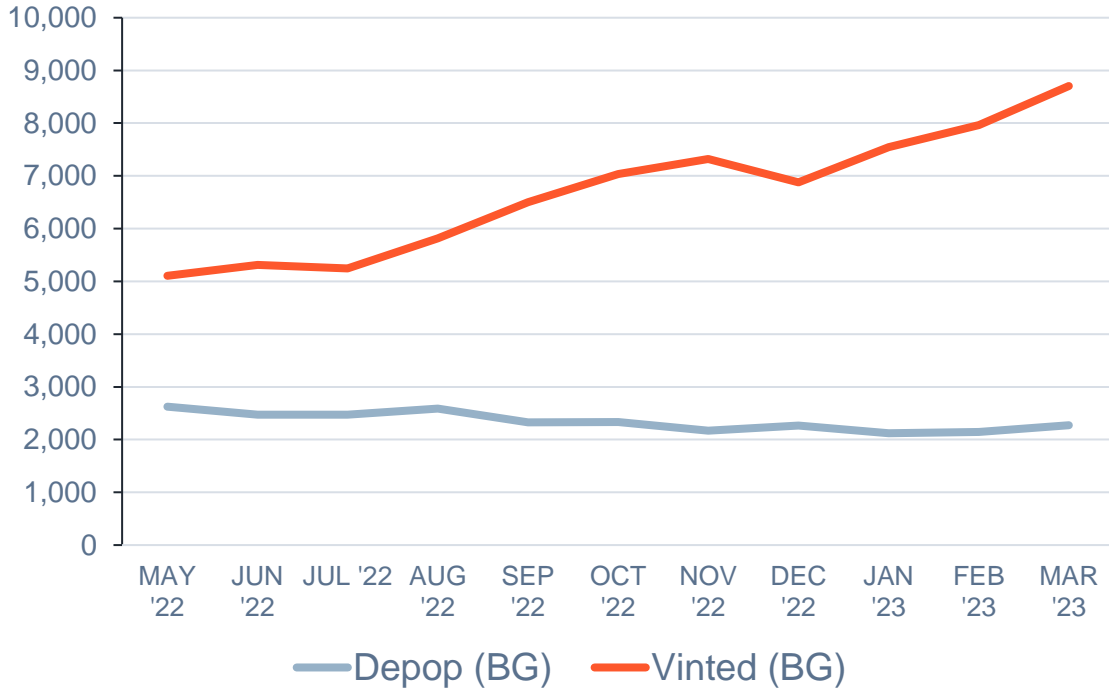


Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 22 and Mar 23

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

# Vinted & Depop audience by month (000s)

Vinted's audience continues to grow – 8.7m people used the 'pre-loved' online brand in March



Source: UKOM Ipsos iris Online Audience Measurement Service

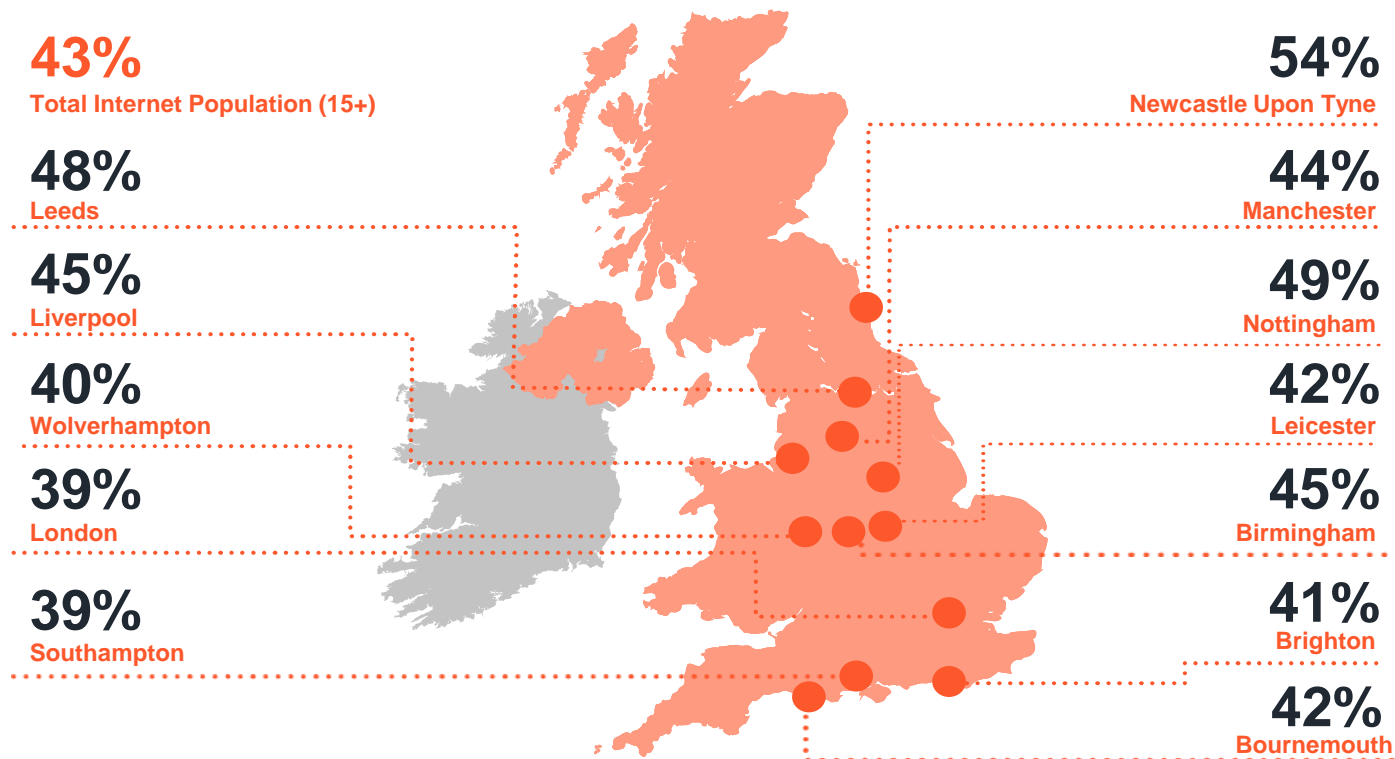
Base - All aged 15+ years using a PC, smartphone or tablet device(s).



# Online football news audience - reach (%) by city



Among those with a Premier League club, Newcastle topped the table for the highest % viewing football news online in March 2023, whilst London and Southampton are bottom of the league



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 23

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





# 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)

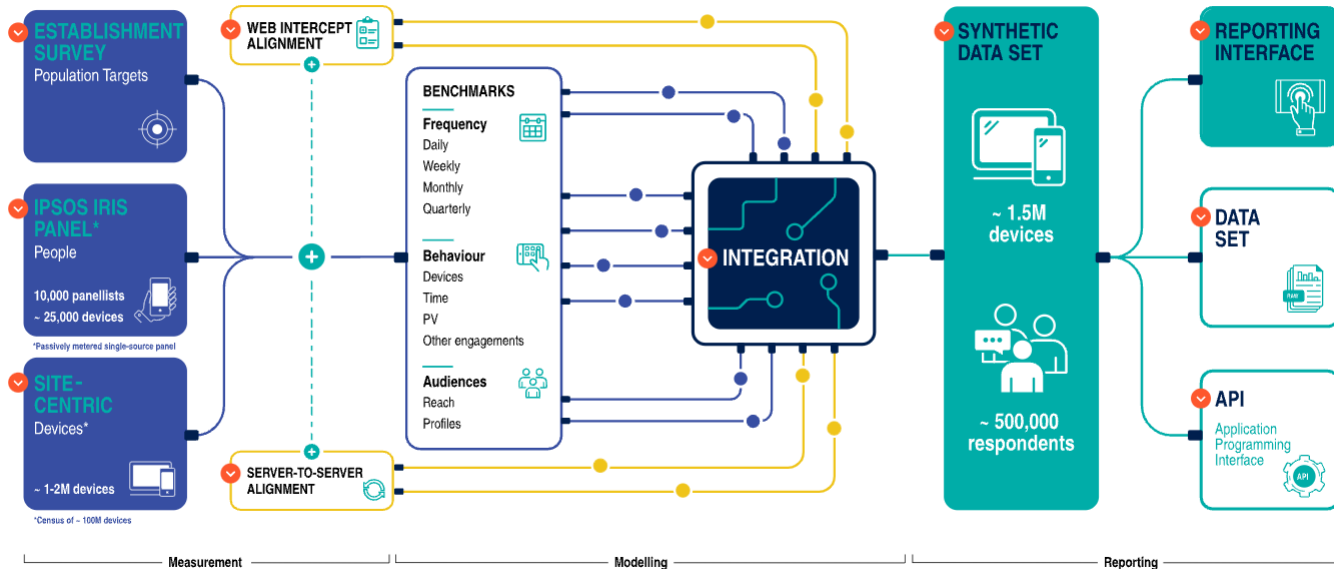
# Methodology



## 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/>