

UKOM

**Digital Market
Overview**

June 2023



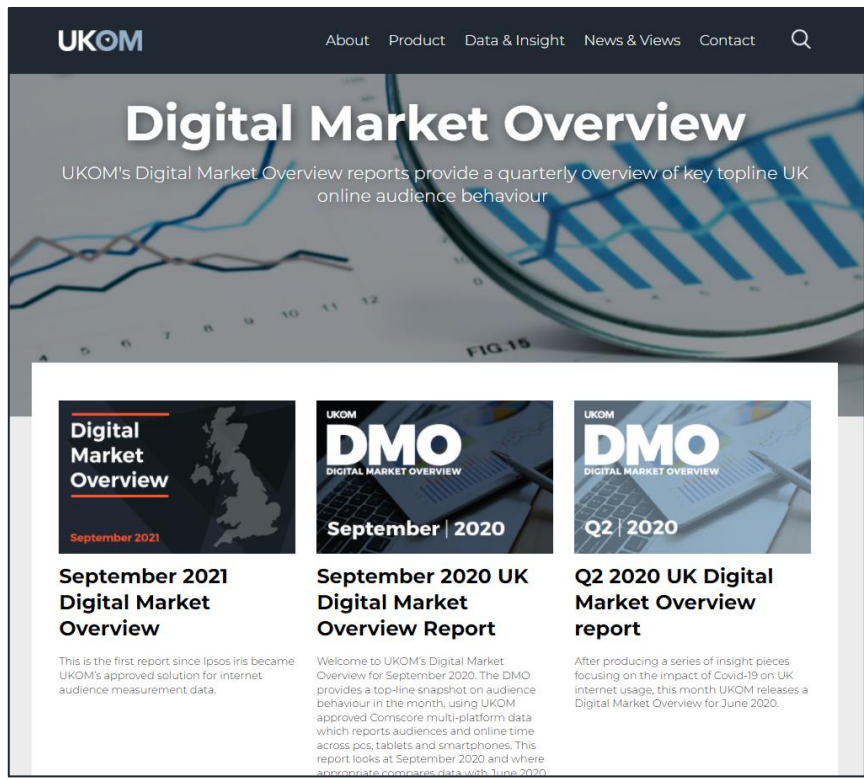
The UK Digital Market Overview June 2023



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



Key methodology changes since March 2023



- **New Universe (from April 2023)**

The new total internet population 15+ has been updated to bring it in line with the latest PAMCo 2022 survey estimates. The total universe size (internet users aged 15+) increased from 50,085,806 to 50,236,983 in April 2023 data. Ipsos also enhanced the fusion methodology to increase the accuracy of the audience composition for the Social Economic Grade (SEG) and App Operating System (iOS/Android) target variables.

- **App Fusion Time Enhancements (from May 2023)**

Please note that improvements have been made to the Ipsos iris UK synthetic App data to more closely align the Minutes metric with weighted panel data. This resulted in a decrease of 39% of Facebook app time spent, which consequently impacted the whole social media category time spent to decrease by 13%. Please note this is a data **fusion enhancement** rather than a behavioural change. Other major apps impacted include Twitter, Facebook Messenger and Microsoft Outlook.

Given the changes above, there will be NO trending for minutes metrics pre and post May in this DMO. Audience comparisons will be based on April v June 2023 rather than March v June 2023.



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

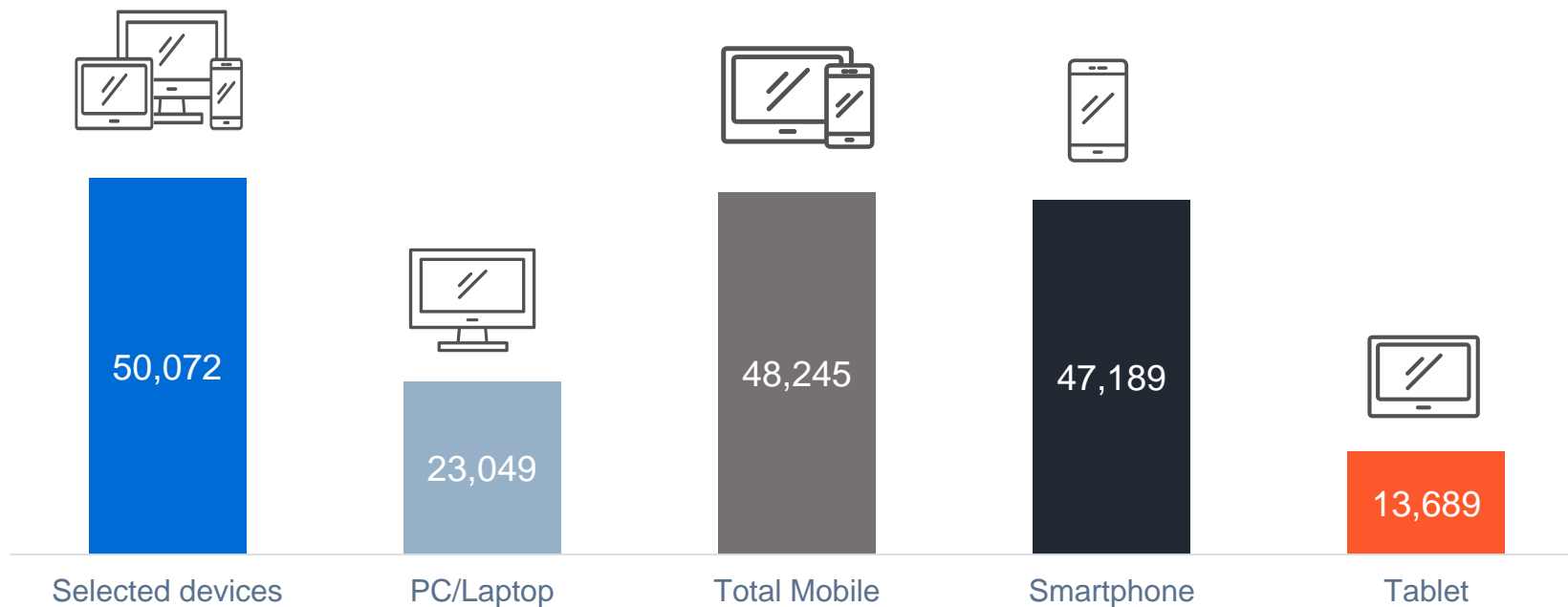
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Averages are based on users of each device.

Audience by device



Online audience by device (000s)

More than twice as many people use smartphones than computers



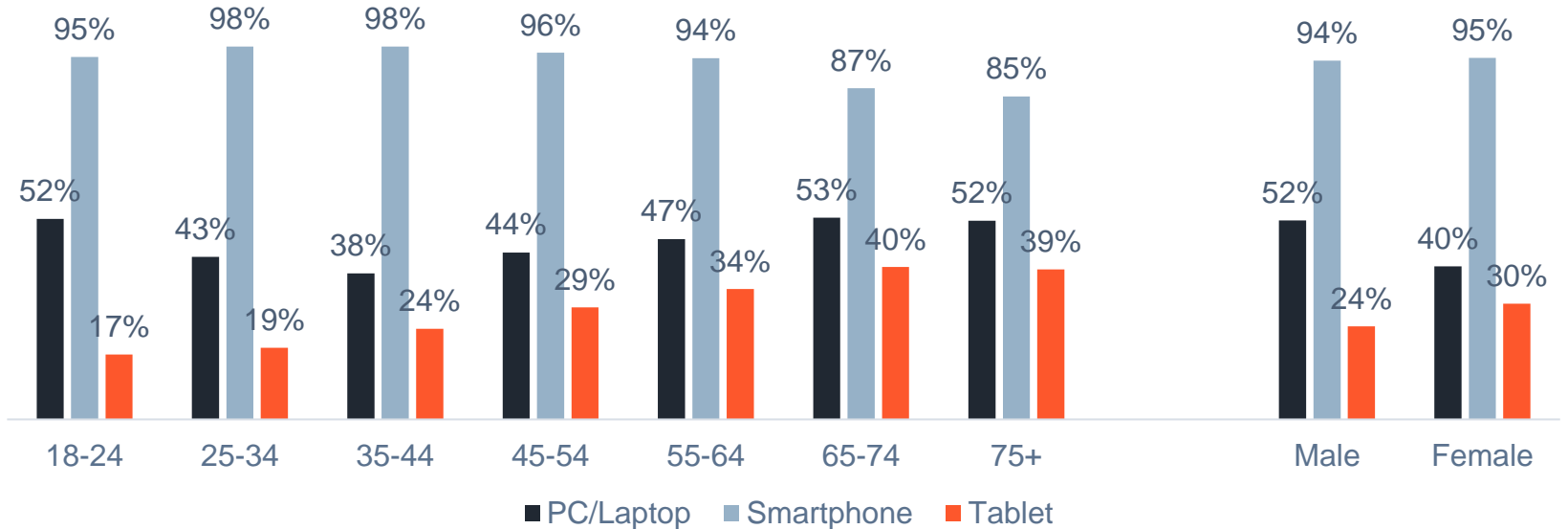
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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, June 2023

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

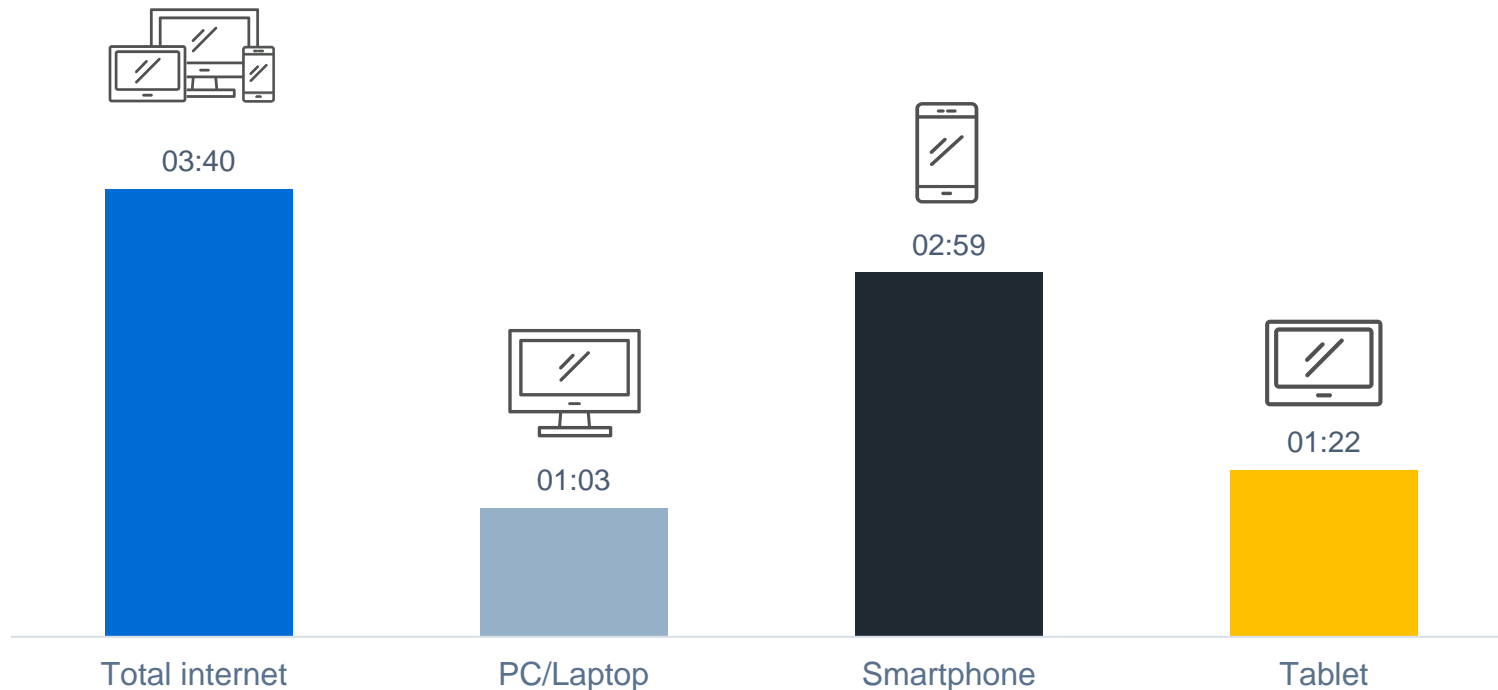
Time online



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



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



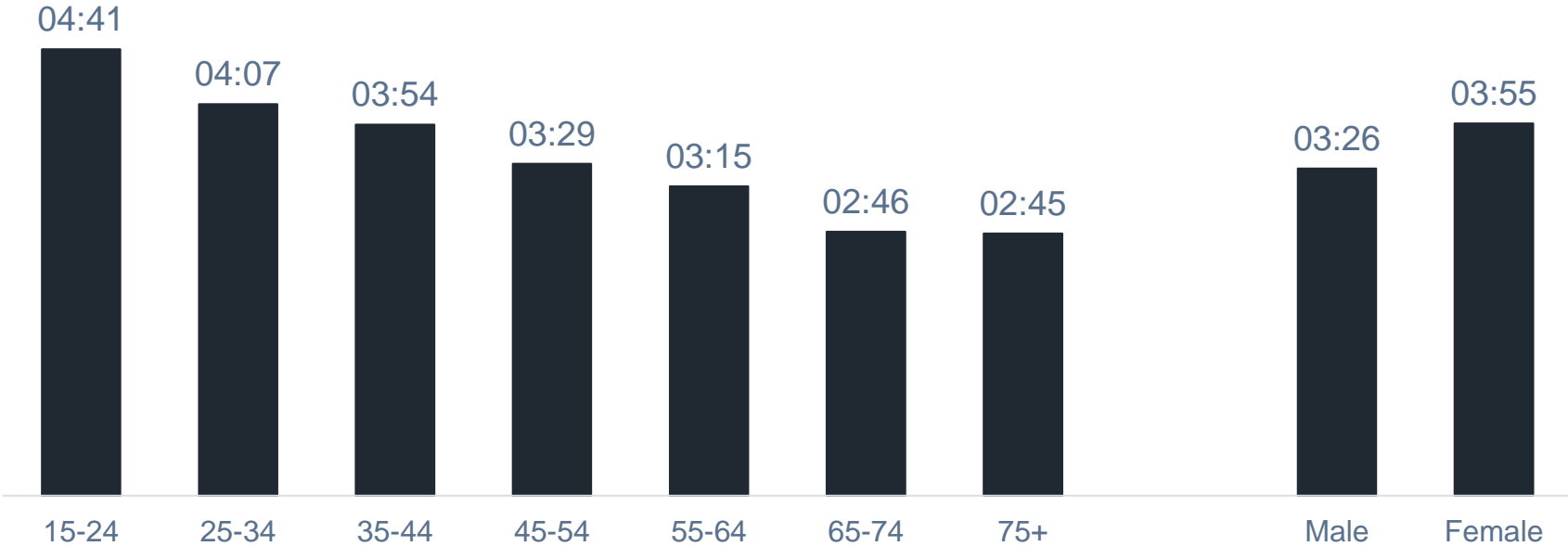
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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

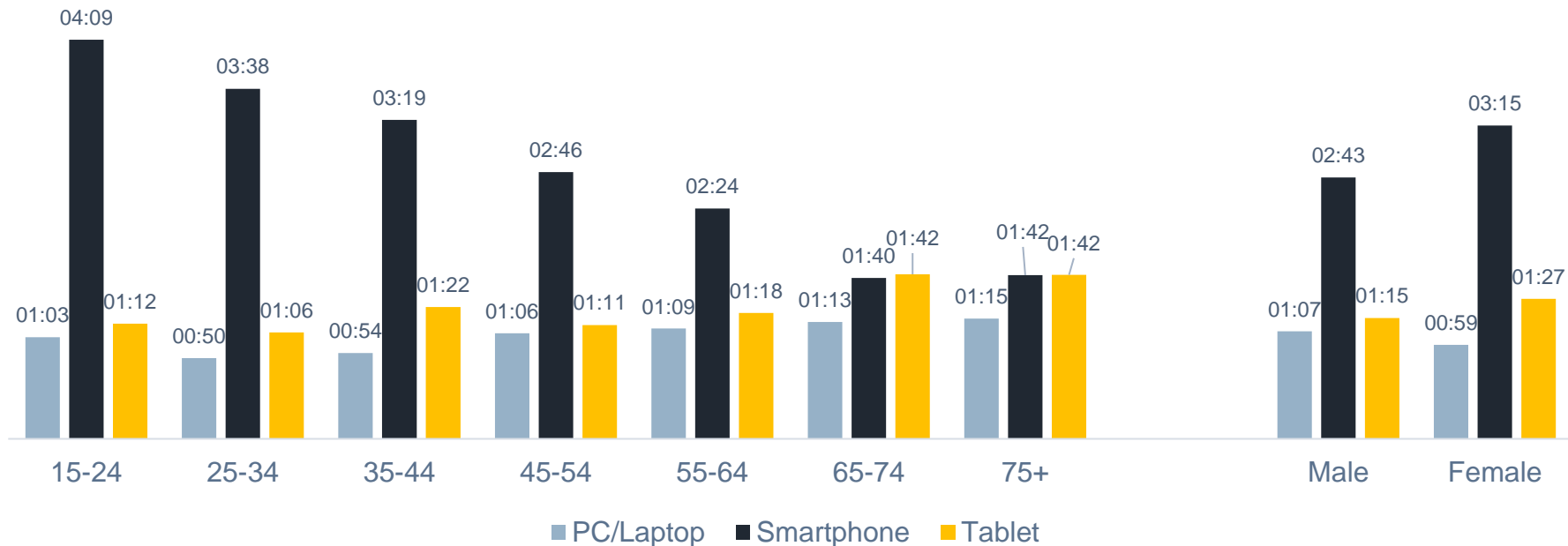


Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

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



Younger audiences spend most time on smartphones. There is little difference in average time spent between smartphones and tablets among over 65s who use each device.



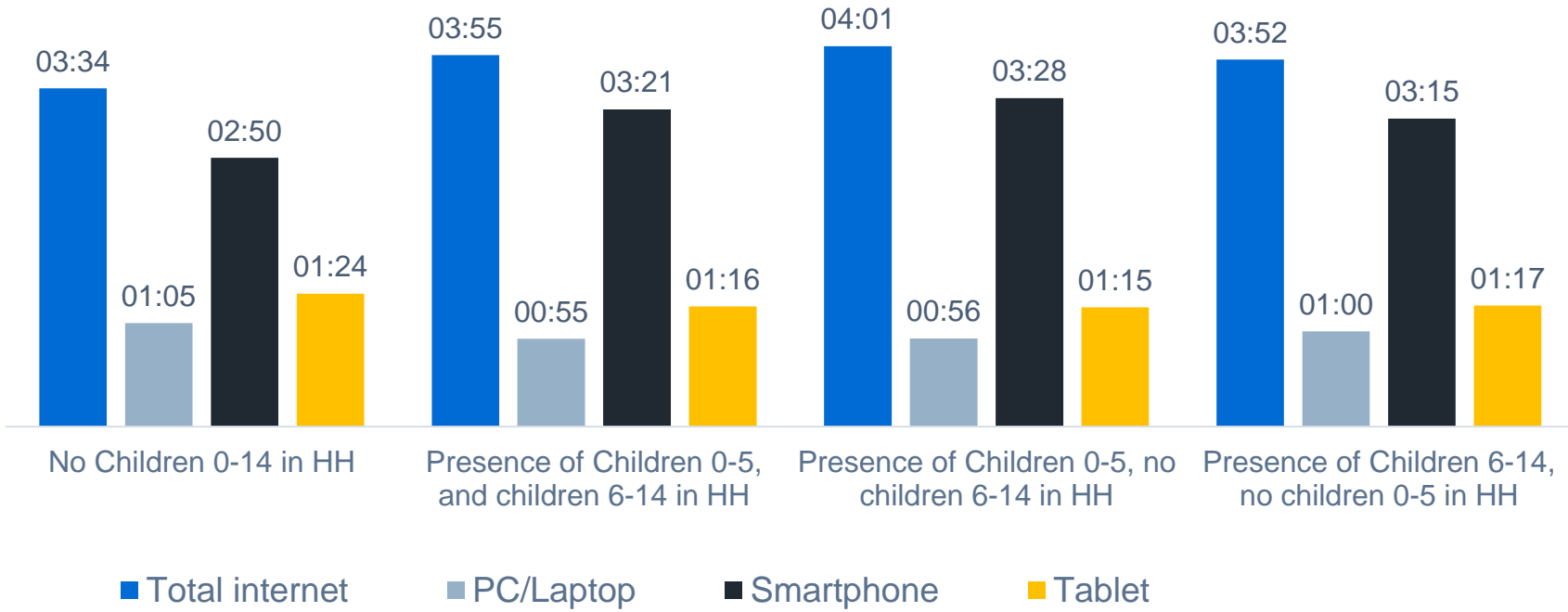
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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

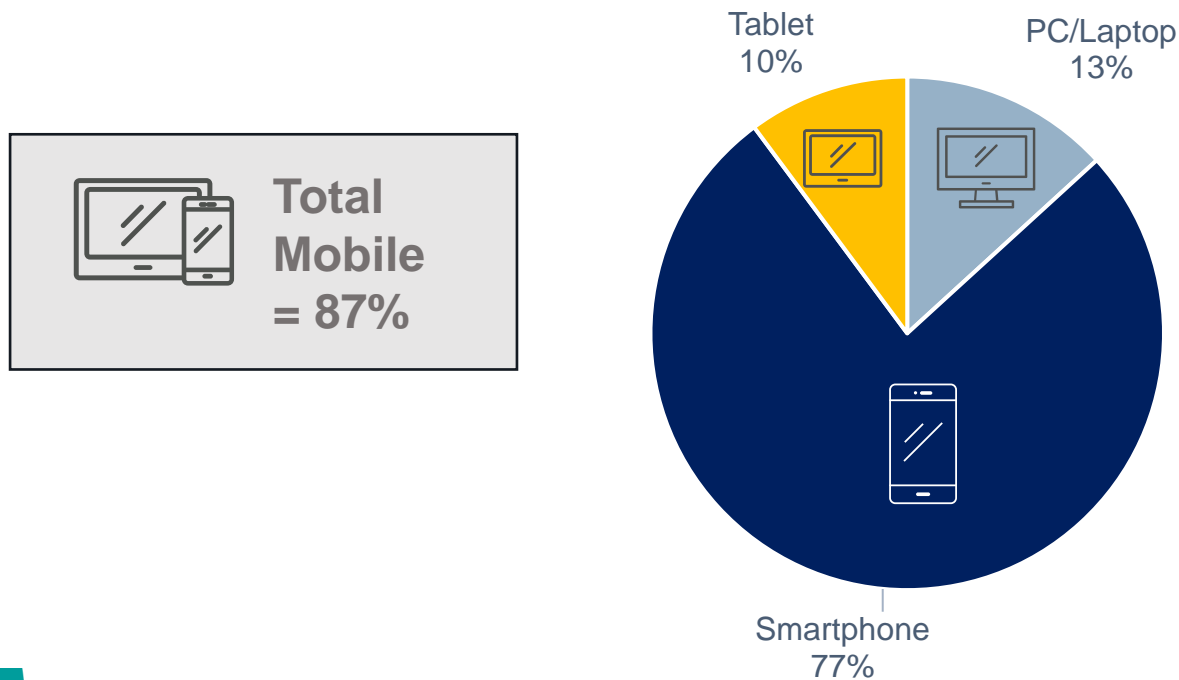


Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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 77% of time online

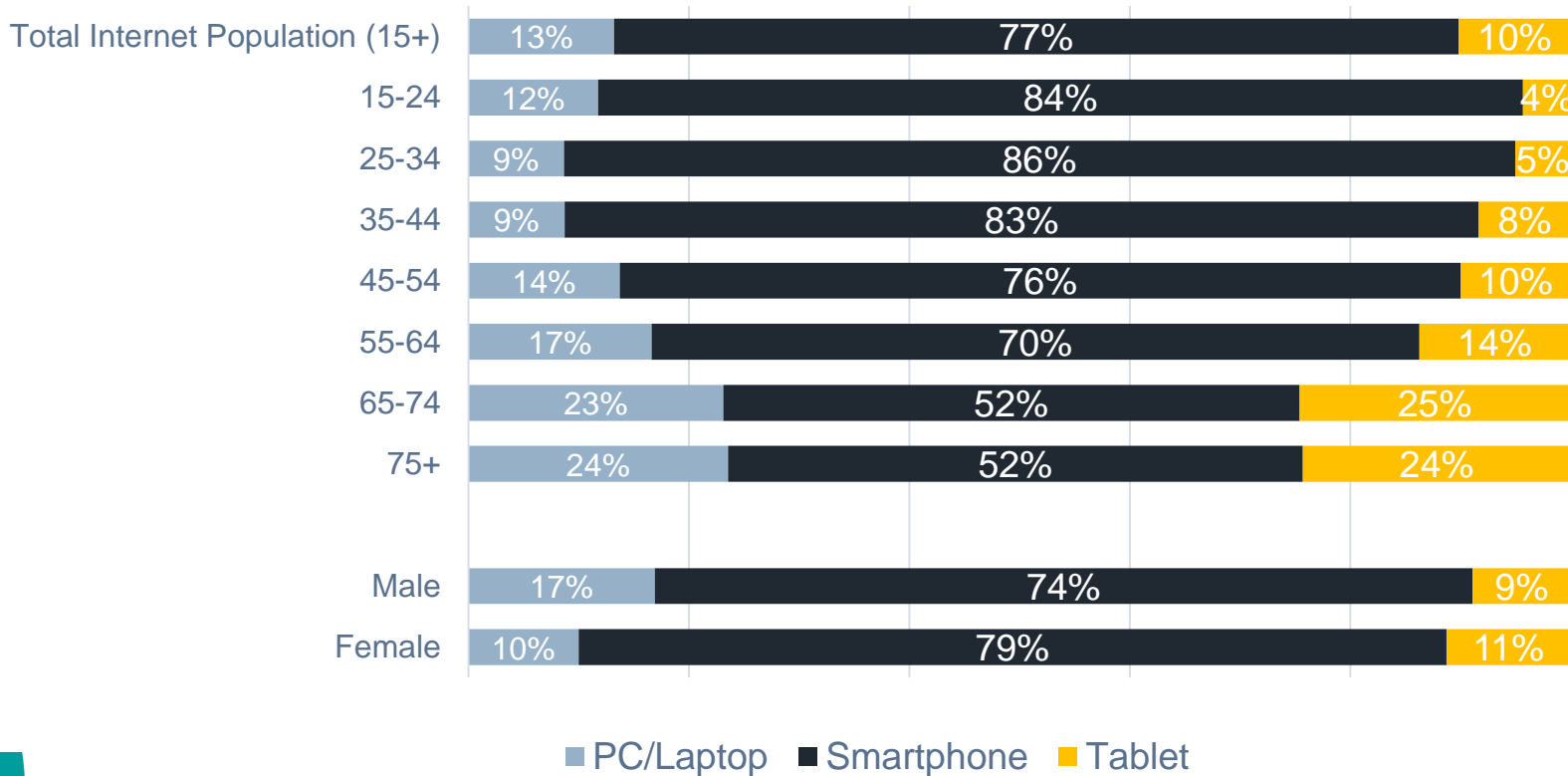


Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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



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

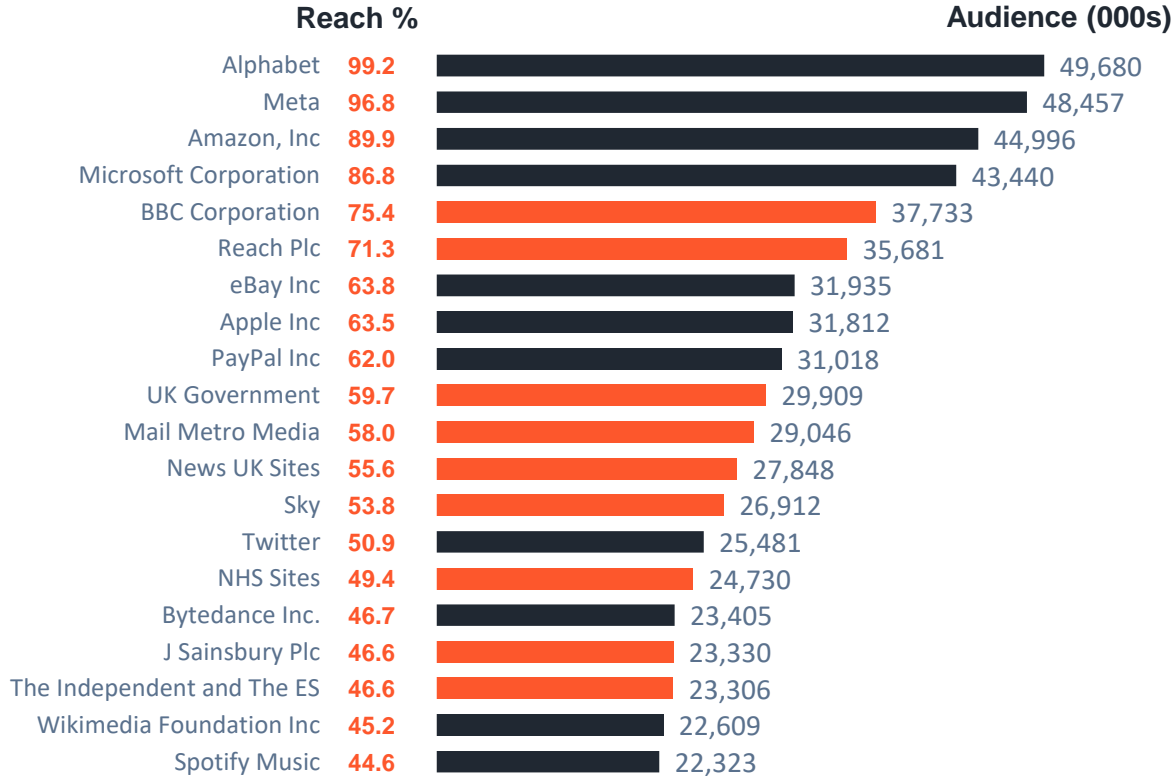
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Top organisations and brands



Top 20 organisations by audience

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



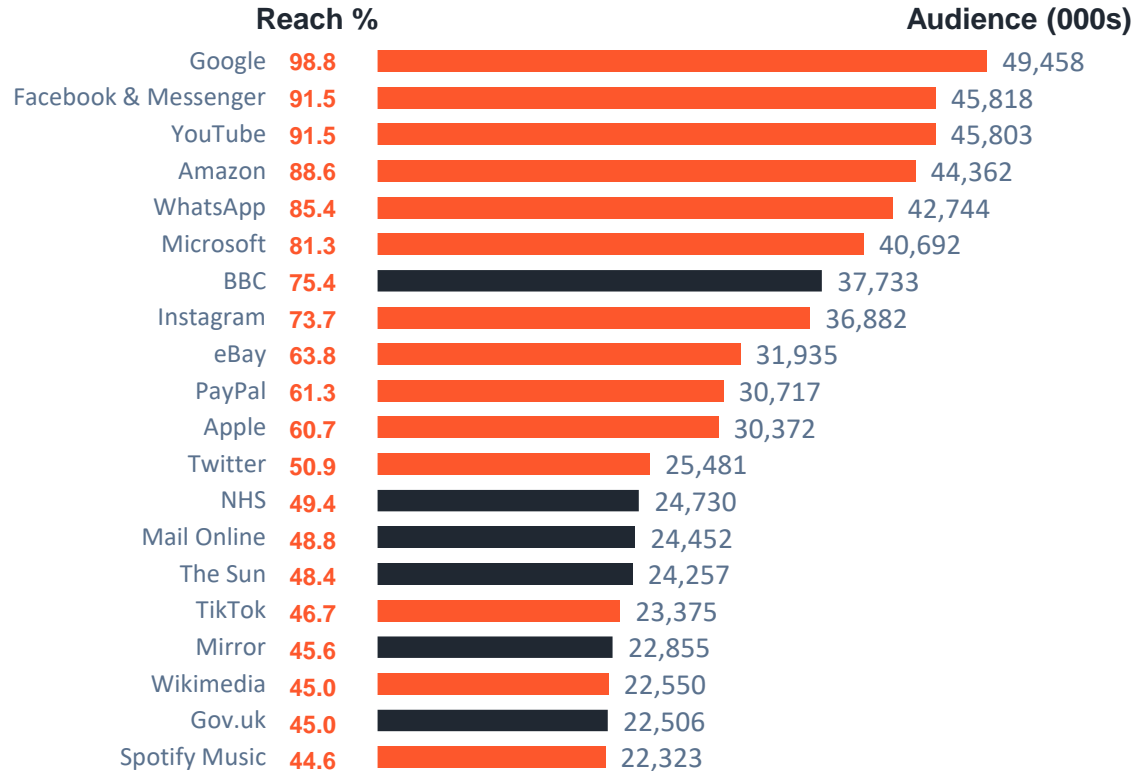
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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



Top 20 online brands by audience

Global brands dominate the top 20 with Alphabet and Meta having 5 of the top 10



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

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



Top 10 brands by audience & minutes



High average time for Snapchat and TikTok propel them into the top 10 for minutes

	Media	Audience (000s)	Audience Reach (%)
1	Google	49,458	98.8
2	Facebook & Messenger	45,818	91.5
3	YouTube	45,803	91.5
4	Amazon	44,362	88.6
5	WhatsApp	42,744	85.4
6	Microsoft	40,692	81.3
7	BBC	37,733	75.4
8	Instagram	36,882	73.7
9	eBay	31,935	63.8
10	PayPal	30,717	61.3

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	38,391	837:53
2	YouTube	30,393	663:33
3	Google	25,099	507:29
4	TikTok	19,651	840:39
5	WhatsApp	17,130	400:45
6	Instagram	13,177	357:17
7	Snapchat	12,520	1045:07
8	Microsoft	9,602	235:58
9	BBC	9,451	250:29
10	Amazon	8,057	181:37



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

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

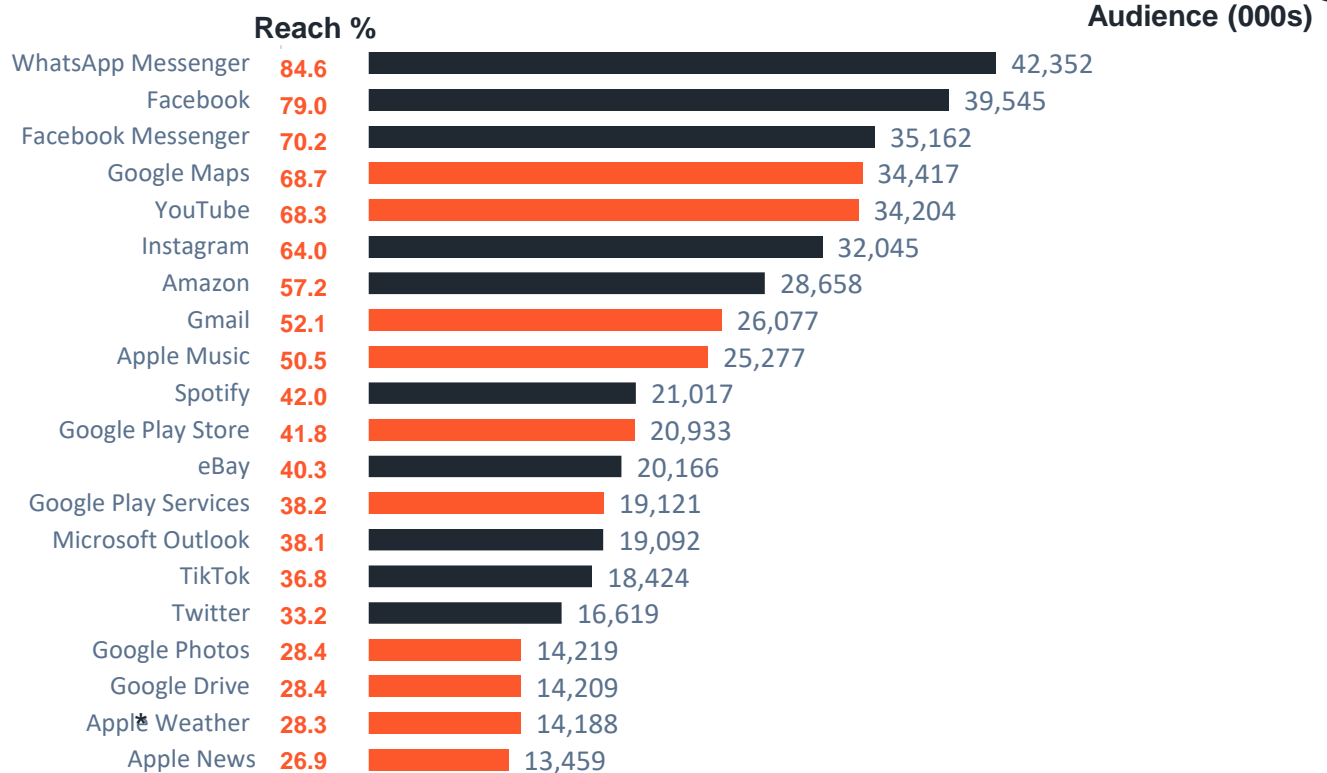
NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/out of focus*.

Top mobile apps



Top 20 mobile apps by audience

Native apps from Google and Apple account for half of the top 20. No British apps feature



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

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 Messenger	42,352	84.6
2	Facebook	39,545	79.0
3	Facebook Messenger	35,162	70.2
4	Google Maps	34,417	68.7
5	YouTube	34,204	68.3
6	Instagram	32,045	64.0
7	Amazon	28,658	57.2
8	Gmail	26,077	52.1
9	Apple Music	25,277	50.5
10	Spotify	21,017	42.0

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	28,199	713:05
2	YouTube	22,468	656:53
3	TikTok	19,602	1063:56
4	WhatsApp Messenger	16,948	400:10
5	Instagram	12,899	402:31
6	Snapchat	12,478	1070:33
7	Facebook Messenger	6,815	193:50
8	Twitter	6,287	378:19
9	Microsoft Outlook	4,953	259:24
10	Google Maps	4,695	136:25



Source: UKOM Ipsos iris Online Audience Measurement Service, June 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



Content determines device choice - video viewing apps rank high on tablet devices for time spent



Smartphone Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	26,152	685:06
2	TikTok	18,834	1068:15
3	WhatsApp Messenger	16,893	400:07
4	YouTube	16,592	515:34
5	Instagram	12,565	407:29
6	Snapchat	12,375	1071:08
7	Facebook Messenger	6,219	181:29
8	Twitter	5,949	367:21
9	Google Maps	4,548	134:51
10	Microsoft Outlook	4,414	238:30



Tablet Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	YouTube	5,876	958:16
2	Facebook	2,047	318:36
3	TikTok	768	542:00
4	BBC iPlayer	753	297:18
5	Netflix	697	234:28
6	YouTube Kids	600	1338:07
7	Facebook Messenger	597	140:14
8	Microsoft Outlook	539	285:05
9	Gmail	455	134:05
10	Disney+	444	406:46



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

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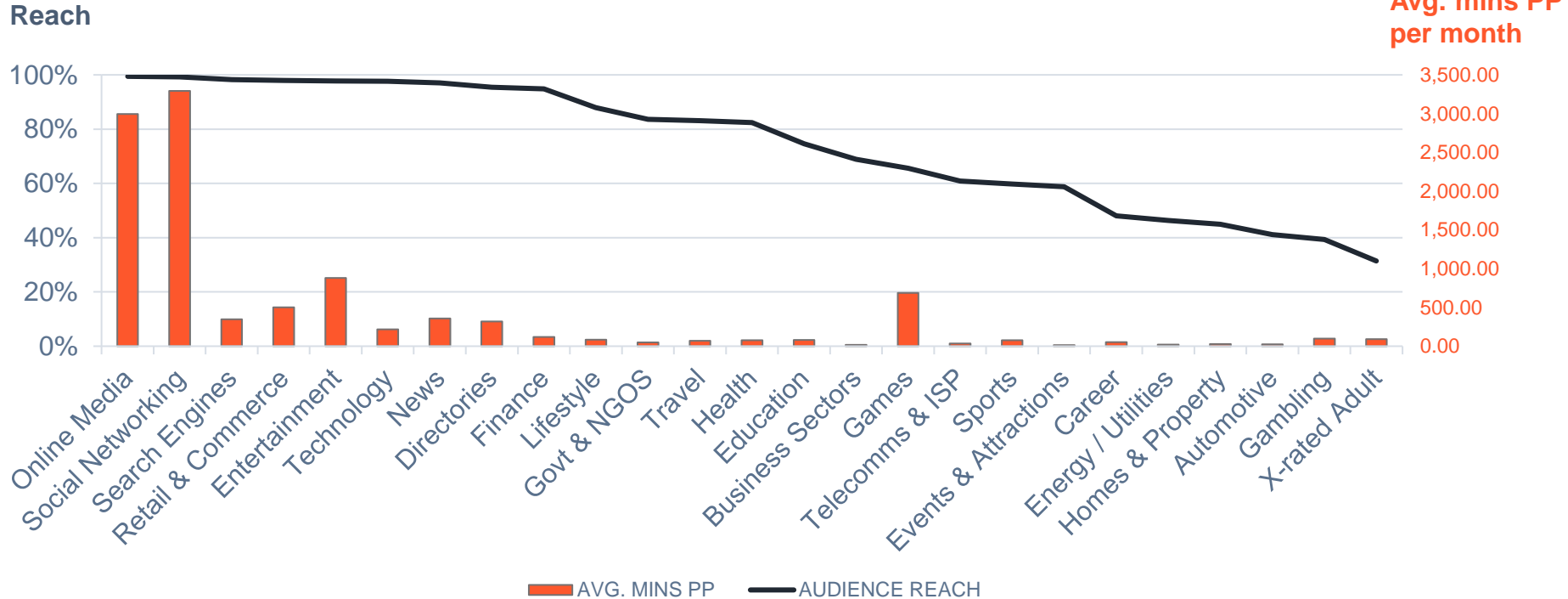
Category usage & trends



Reach & engagement by category



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



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

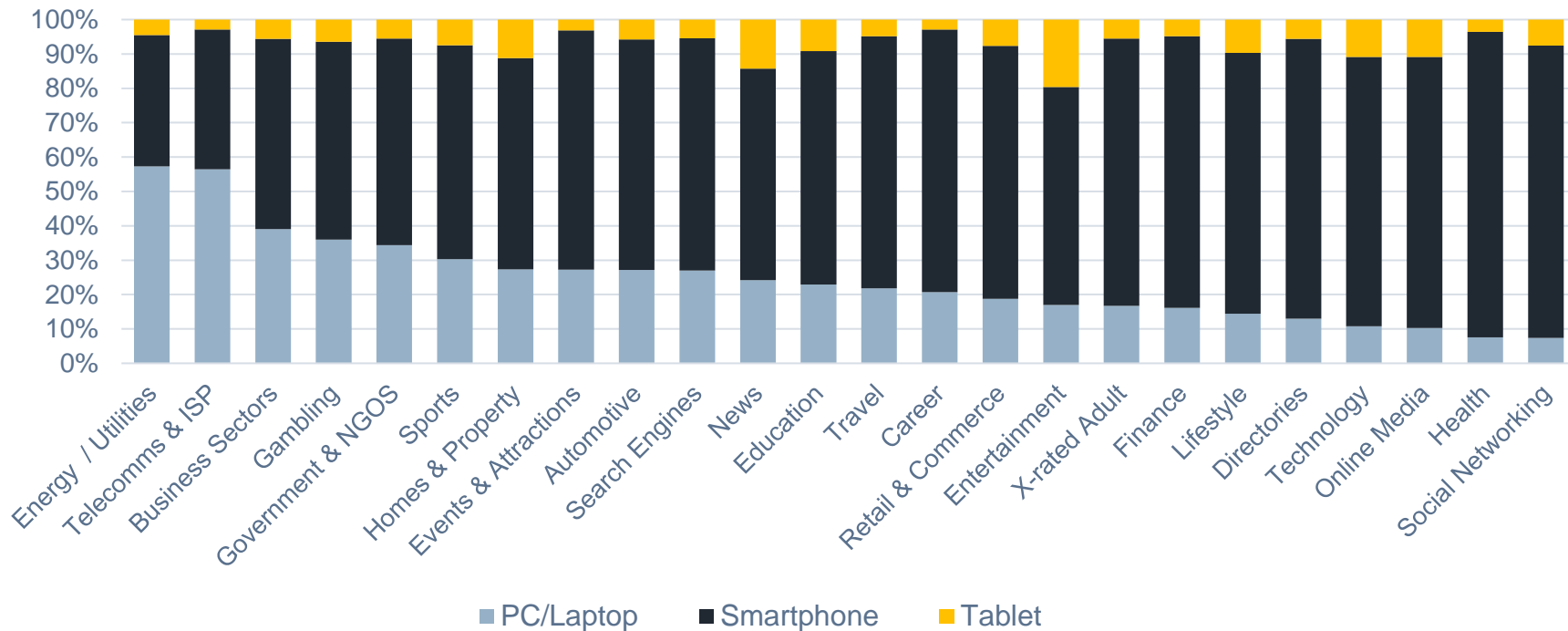
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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 category



Content type influences choice of device but smartphones are now the primary device for most categories



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

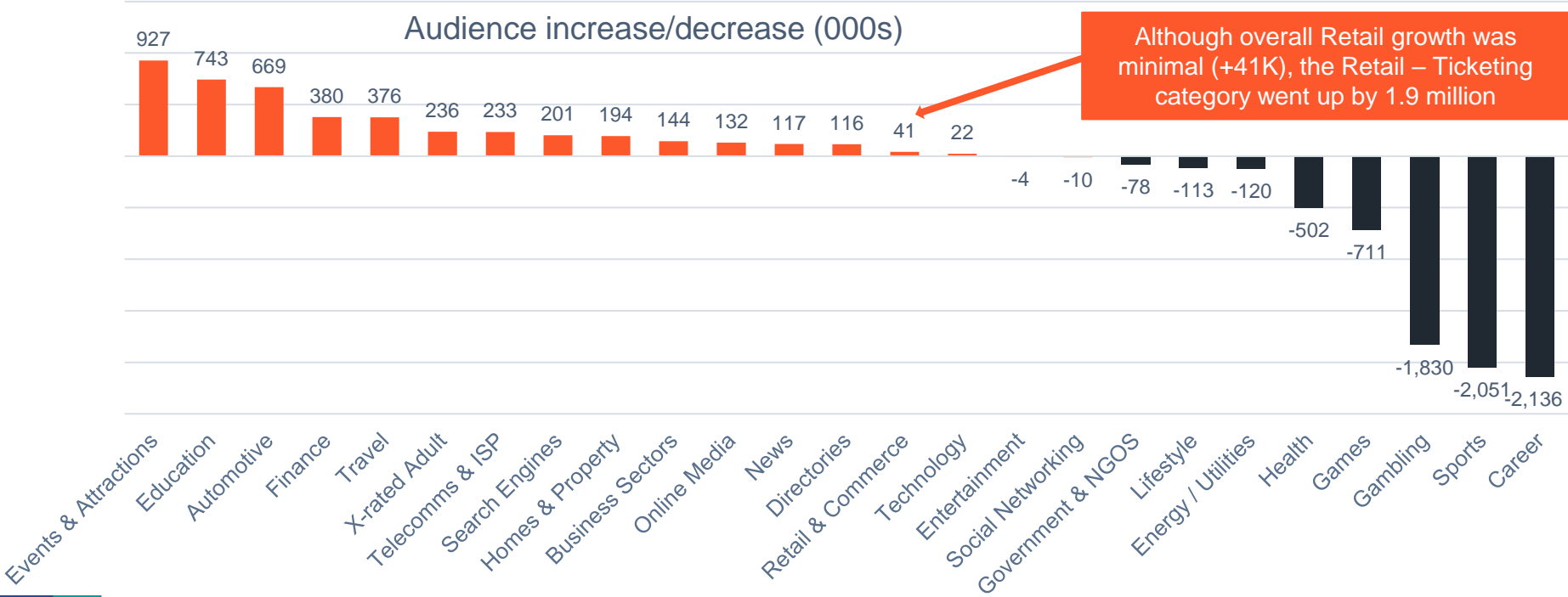
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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

Category audience change (000s): Apr – Jun 2023



School exams and summer festivals/concerts (e.g. Glastonbury/English Heritage) drove increases to the Events and Education categories. Gambling and Sports declined after peaking in April



Source: UKOM Ipsos iris Online Audience Measurement Service, Apr and Jun 2023

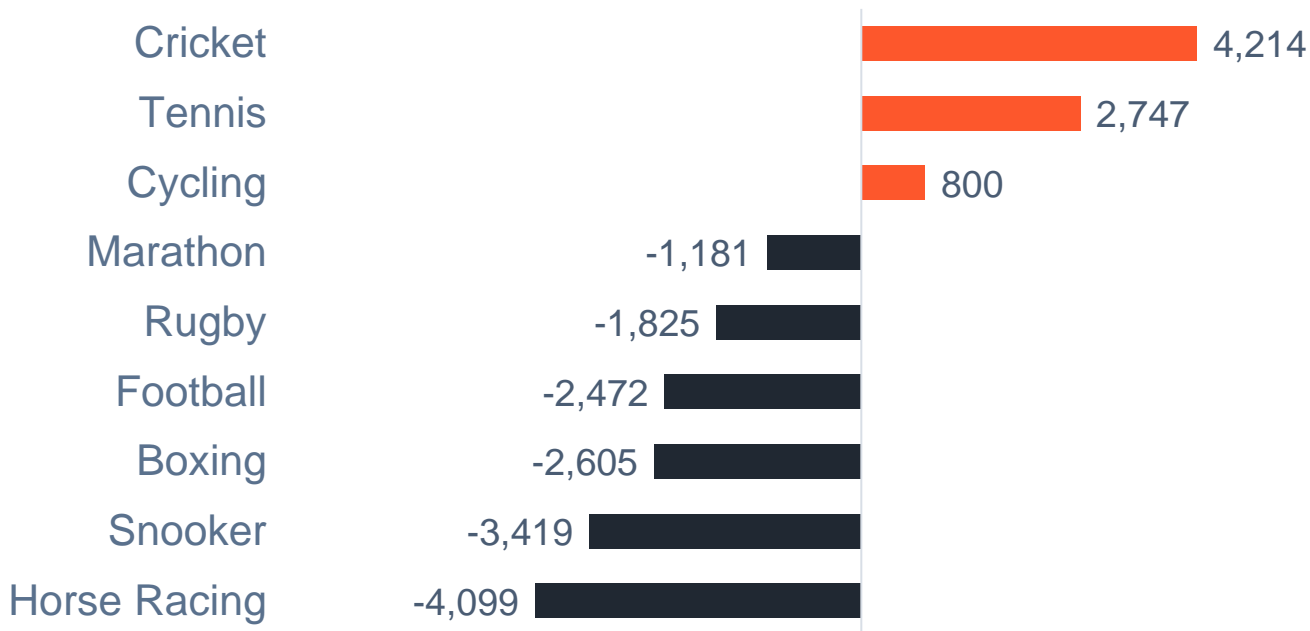
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

Sports audience change (000s): Apr 23 – Jun 23



Although Wimbledon and The Ashes drove up audiences for Cricket and Tennis in June, April's audience was higher due to the Grand National, The Marathon and the Snooker World Championship

Biggest audience changes (000s) : Apr 23 – Jun 23



Source: UKOM Ipsos iris Online Audience Measurement Service

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



Key changes: Apr 23 – Jun 23

Due to a change in universe sizes in April, comparisons this quarter are for April v June



Online brands adding most audience: Apr-Jun 2023



Temu, which launched in the UK in April 2023 has had phenomenal growth in 3 months

	AUDIENCE (000S)			
	APR '23	JUN '23	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	50,047	50,072	0.00%	25
Temu	2,623	18,260	596%	15,636
Met Office	9,709	11,766	21%	2,057
Glastonbury Festival	258	1,833	610%	1,575
Reuters News	3,139	4,672	49%	1,532
Birmingham Live	8,226	9,645	17%	1,419
Ticketmaster	4,301	5,674	32%	1,372
ITV	14,248	15,477	9%	1,229
Global	7,615	8,841	16%	1,226
The Weather Company	4,768	5,965	25%	1,197
English Heritage Trust	-	1,170	-	1,170

NB: The Temu mobile app was not measured in April 2023 so the data for April is website only



Source: UKOM Ipsos iris Online Audience Measurement Service, Apr and Jun 2023

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

Mobile Apps adding > 500K: Apr 23 – June 23



Two new apps - Temu and Monopoly Go - both featured in the top 3 for most audience added

	AUDIENCE (000s)			
	APR '23	JUN '23	Change (%)	Change (abs)
TOTAL INTERNET POPULATION (15+)	50,047	50,072	0.00%	25
Temu	-	10,783	-	10,783
Amazon Prime Video	7,462	8,873	19%	1,411
MONOPOLY GO!	-	1,128	-	1,128
Boots	4,843	5,896	22%	1,053
My Morrisons	2,989	3,932	32%	943
Shein	5,505	6,408	16%	903
Ticketmaster - Event Tickets	1,343	2,230	66%	887
OLIO	2,581	3,406	32%	825
Jabra Sound+	230	949	313%	719
BBC Sounds	7,270	7,953	9%	683
Google Maps	33,810	34,417	2%	607
PictureThis - Plant Identifier	943	1,507	60%	564

Source: UKOM Ipsos iris Online Audience Measurement Service, Apr 23 and Jun 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.





In the News

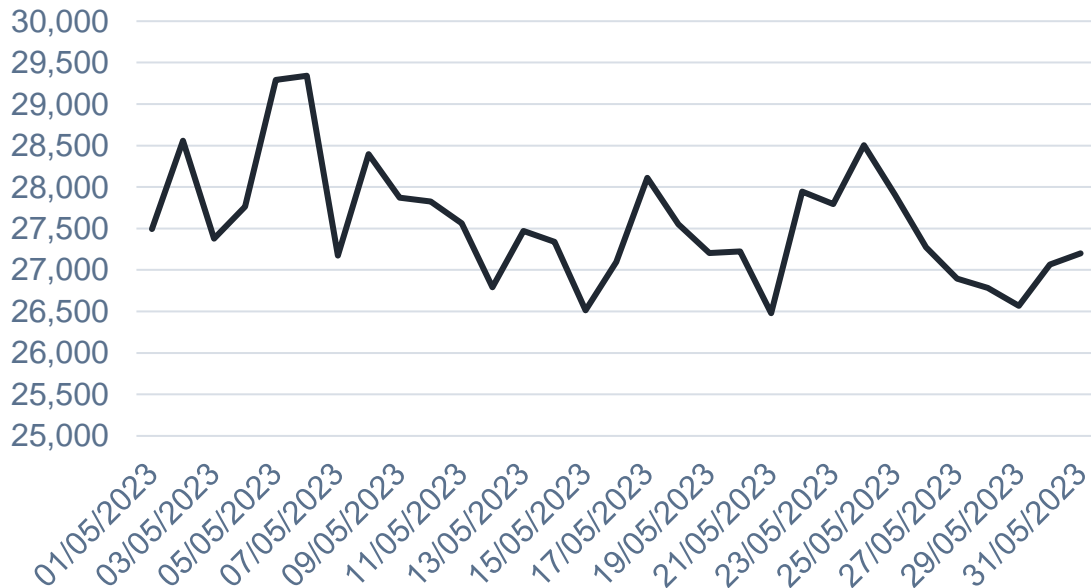


'General news' category audience by day in May



6th May had the biggest 'general news' audience – the day of the King's coronation

General News category audience by day (000s)



	Daily Audience (000s)	Daily Reach (%)
06/05/2023	29,343	58.4
May Average	27,560	55

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

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

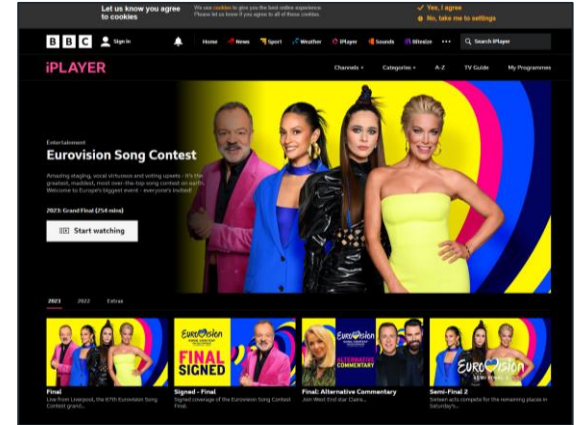
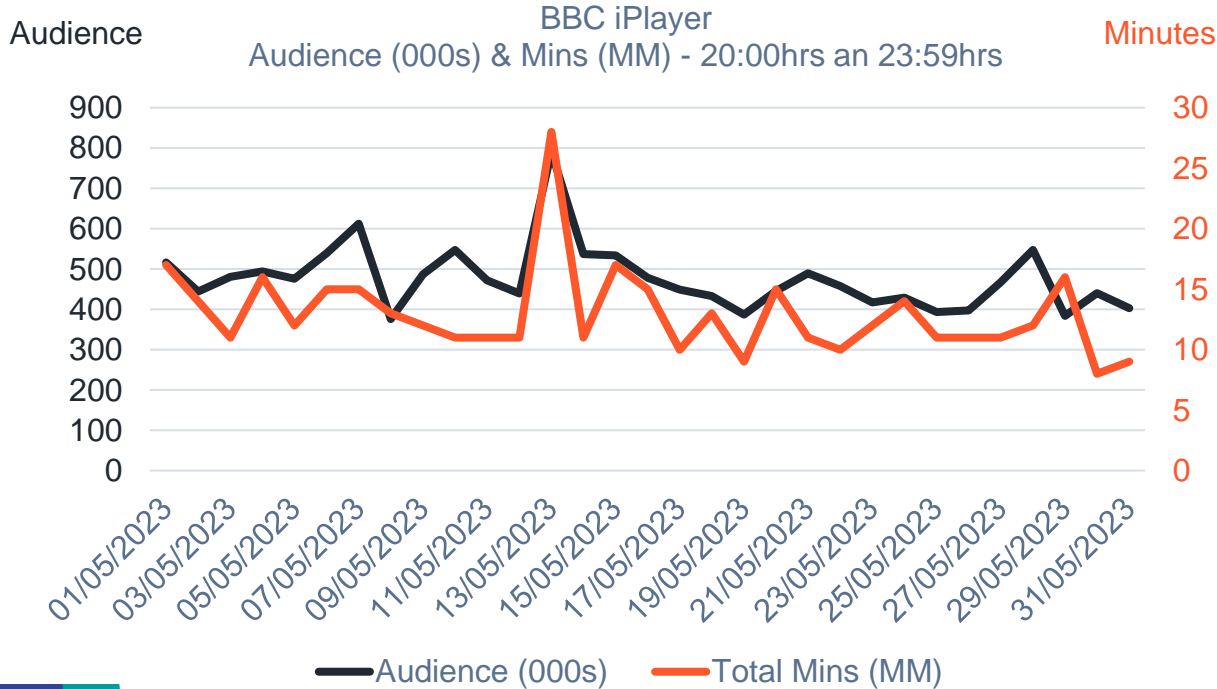
NB: The Y axis starts from 25,000 rather than 0 to better illustrate the uplift



BBC iPlayer app usage increases during Eurovision



Compared to average for the daypart, minutes more than doubled on the BBC iPlayer mobile app between 20:00 and 23:59 on 13th May – the evening of the Eurovision song contest



20:00 hrs – 23:59 daypart	Audience (000s)	Mins (MM)
13/5/2023	791	28
June Average	476	13

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

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

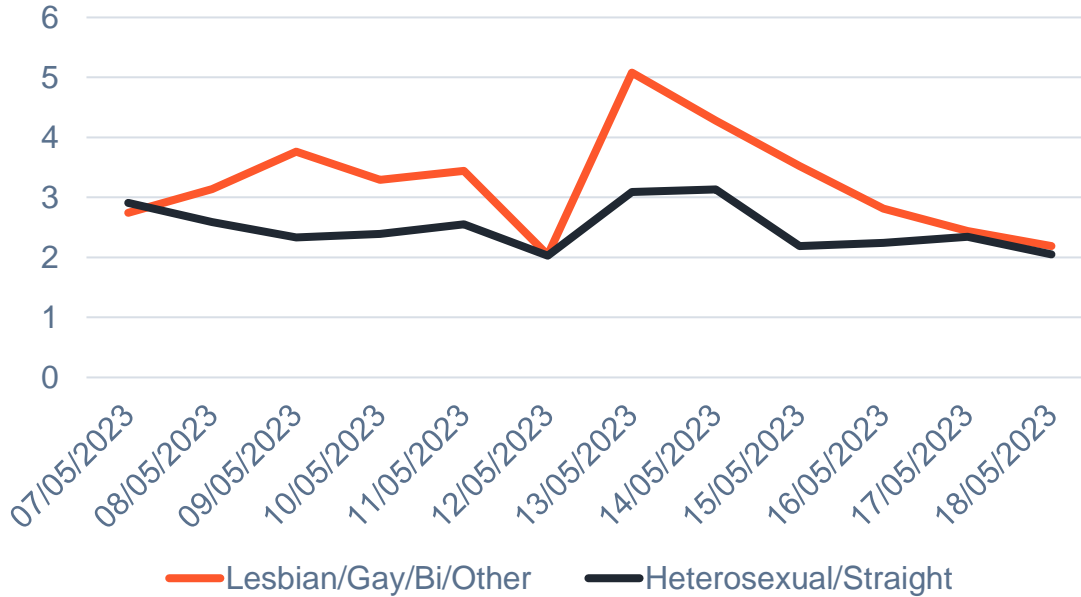


BBC iPlayer mobile app audience reach by day (%)



On the date of the Eurovision Song Contest (13th May), the BBC iPlayer app had a higher reach among non-heterosexual audiences

BBC iPlayer mobile app audience reach (%)



ENTERTAINMENT | WORLD | EUROVISION | LGBT+ | Thursday 11 May 2023 at 9:35am

• Report by Jossie Evans and George Hancorn, ITV News' Here's the Story

Eurovision has a long and proud history of supporting queer artists and championing LGBT+ rights. There have been countless key moments that waved the flag for LGBT+ representation.

In 1998 Dana International entered the competition as the first trans performer - she went onto win for Israel, becoming the first trans Eurovision winner.

The contest has had several out LGBT+ winners since then.



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

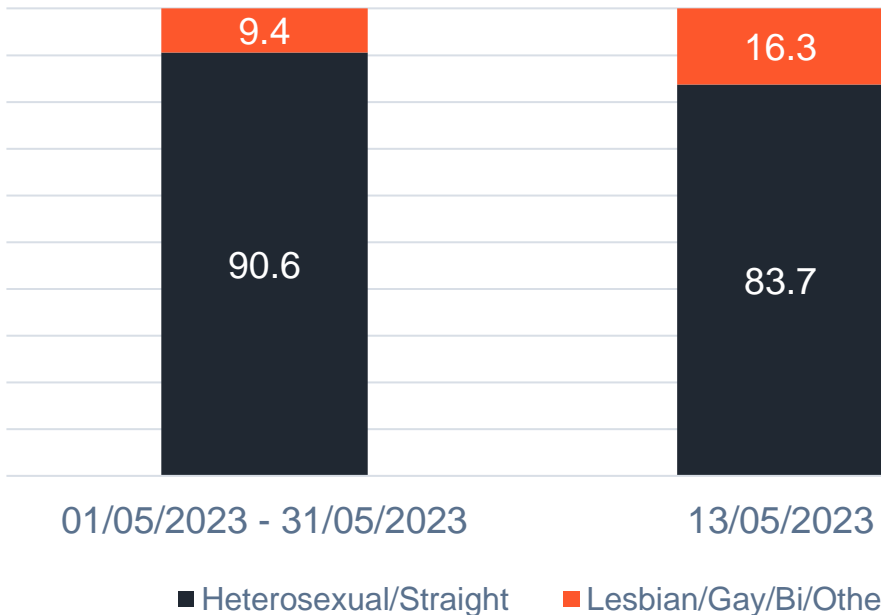
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

BBC iPlayer app profile (%) by sexual orientation



The audience profile of the BBC iPlayer mobile app was skewed more towards non-heterosexuals on Eurovision day (May 13th) compared to the average for the month of May

BBC iPlayer mobile app profile (%)



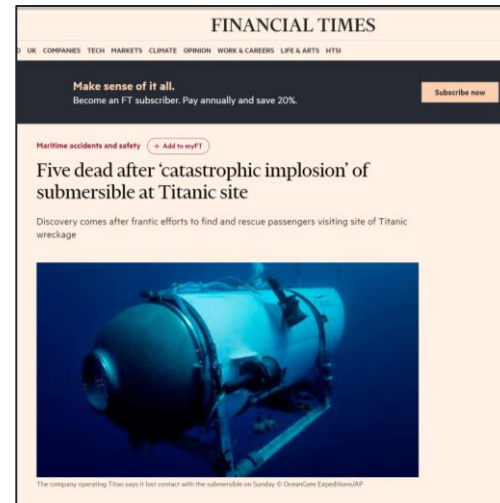
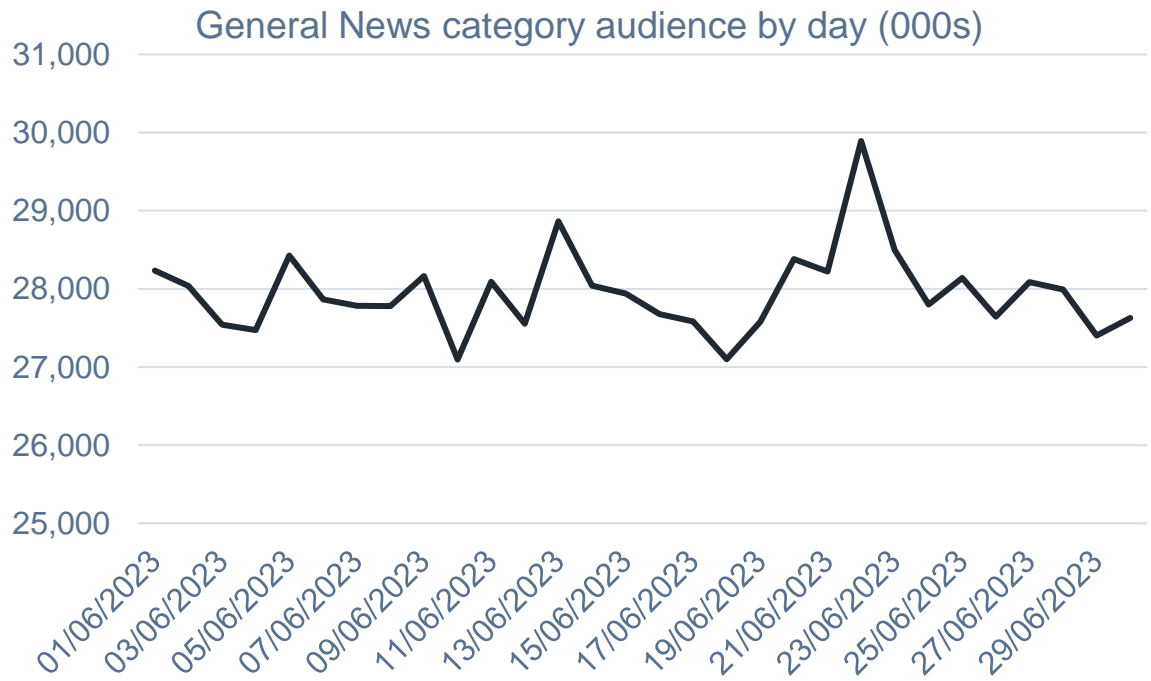
Source: UKOM Ipsos iris Online Audience Measurement Service, May 2023

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

'General news' category audience by day in June



22nd June had the biggest 'news' audience – the day OceanGate announced the sub implosion



	Daily Audience (000s)	Daily Reach (%)	Daily Mins (MM)
22/06/2023	29,890	59.7	476
June Average	27,950	55.8	393

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

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

NB: The Y axis starts from 25,000 rather than 0 to better illustrate the uplift

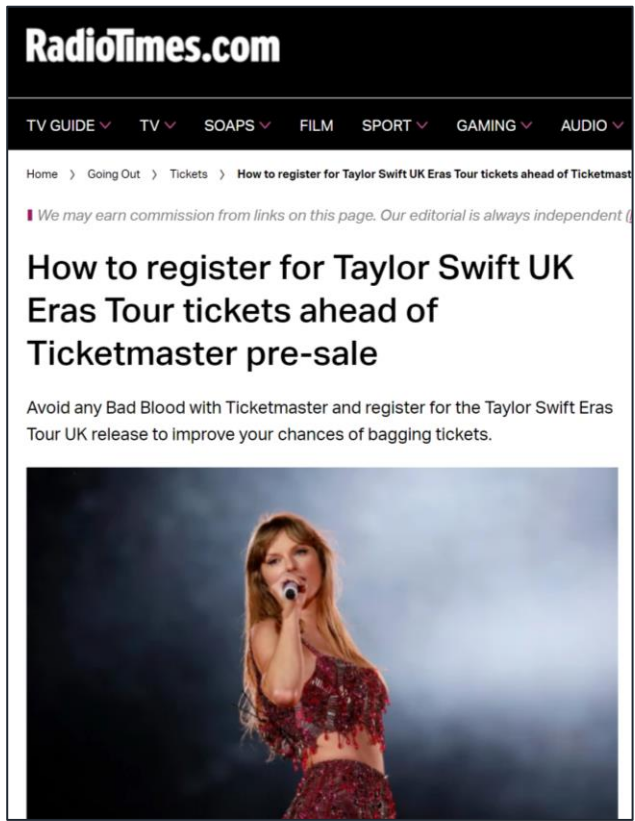
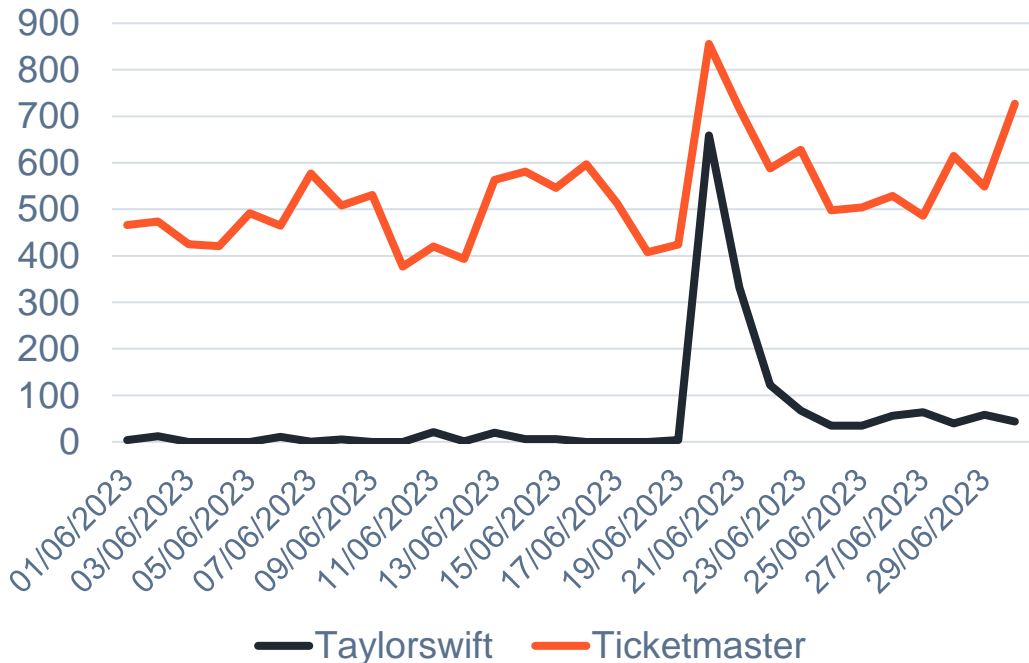


Taylor Swift's tour sparks registration frenzy



Registration for Taylor Swift tour tickets drove uplifts to both Ticketmaster and her own website

Audience by day (000s)



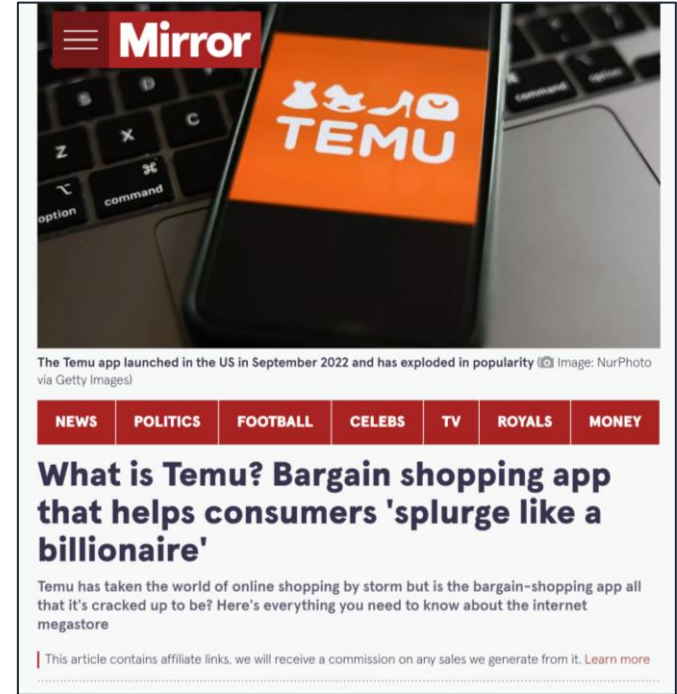
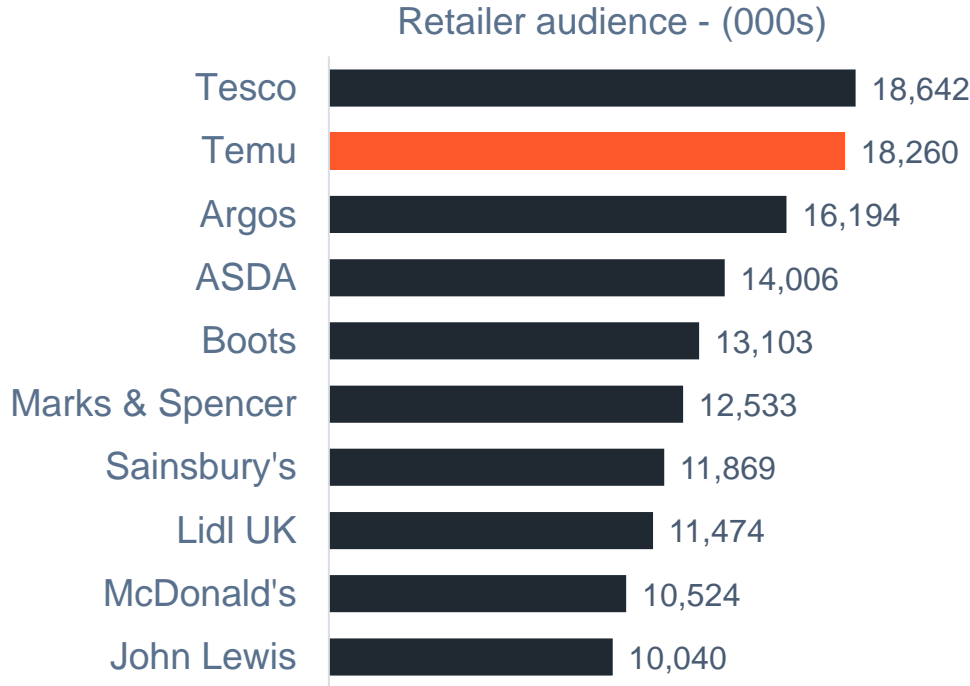
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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Temu's audience outperforms high street names



Temu, which only launched in the UK in April 2023, had an audience of over 18 million in June



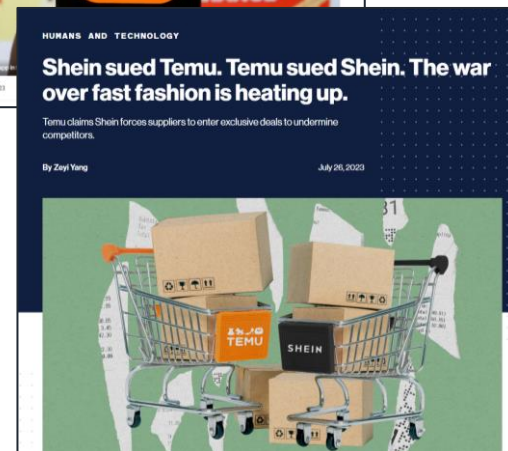
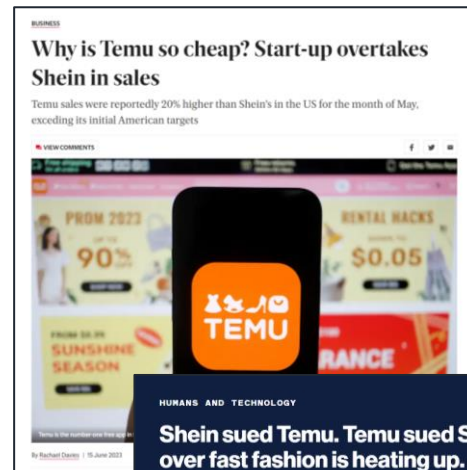
Source: UKOM Ipsos iris Online Audience Measurement Service, June 23
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

The battle of the Chinese ecommerce brands

Temu has a broader, older audience than Shein but both attracted constrained parents



Audience Affinity Index by Fresco segments		
	Temu	Shein
	18.2 million	10.5 million
Young Dependents	73	112
Starting Out	85	125
Rising Metropolitans	87	102
Constrained Parents	116	148
Families Juggling Finances	107	135
Secure Homeowners	107	142
High Income Professionals	101	119
Older Working Families	105	113
Mid-Life Pressed Renters	112	106
Asset Rich Greys	101	62
Road to Retirement	105	68
Budgeting Elderly	109	58
Under 18 (not a Fresco segment)	77	125



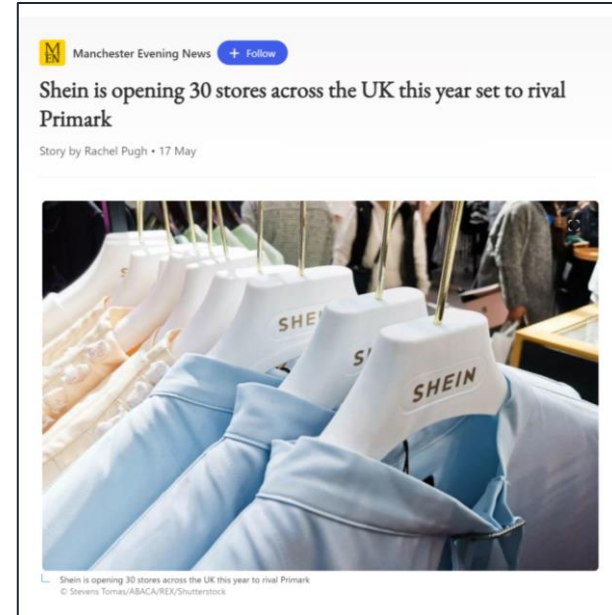
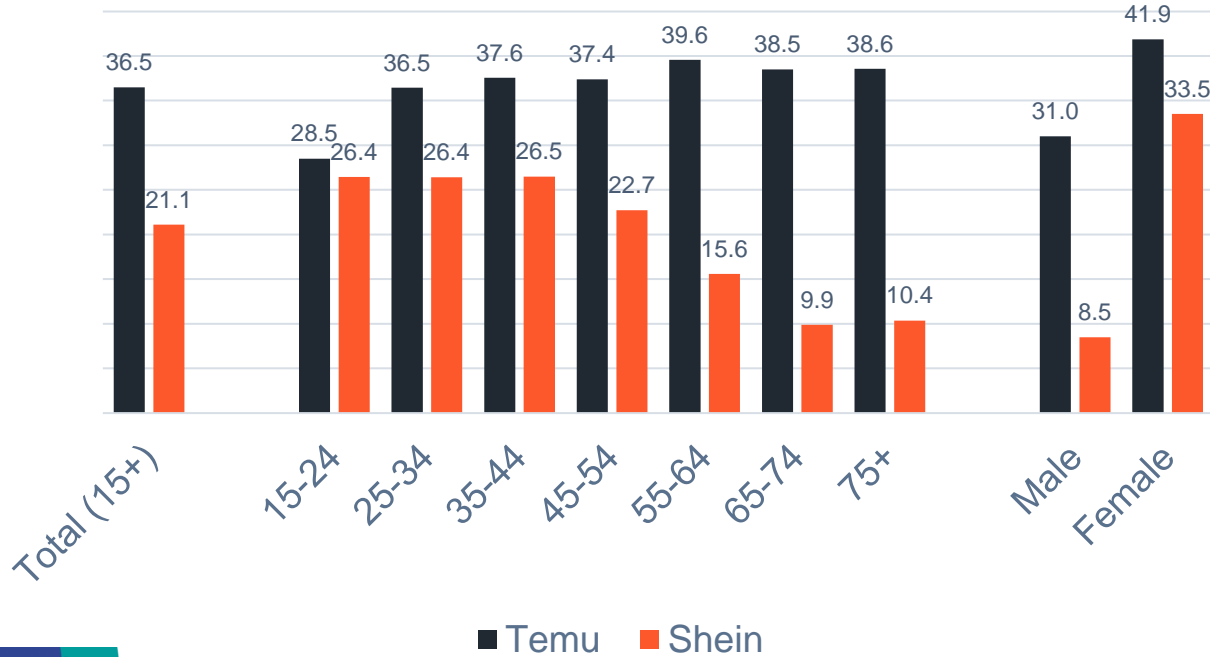
Source: UKOM Ipsos iris Online Audience Measurement Service, June 23
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Reach of Shein & Temu by age and gender

Shein's reach is highest among females and young audiences, whilst Temu's is less skewed



Audience reach (%)

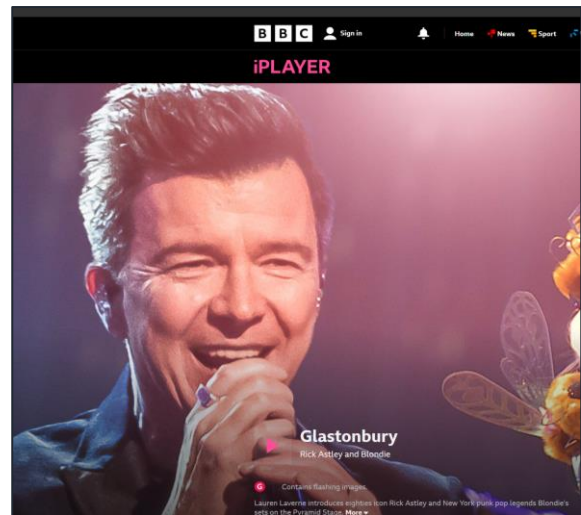
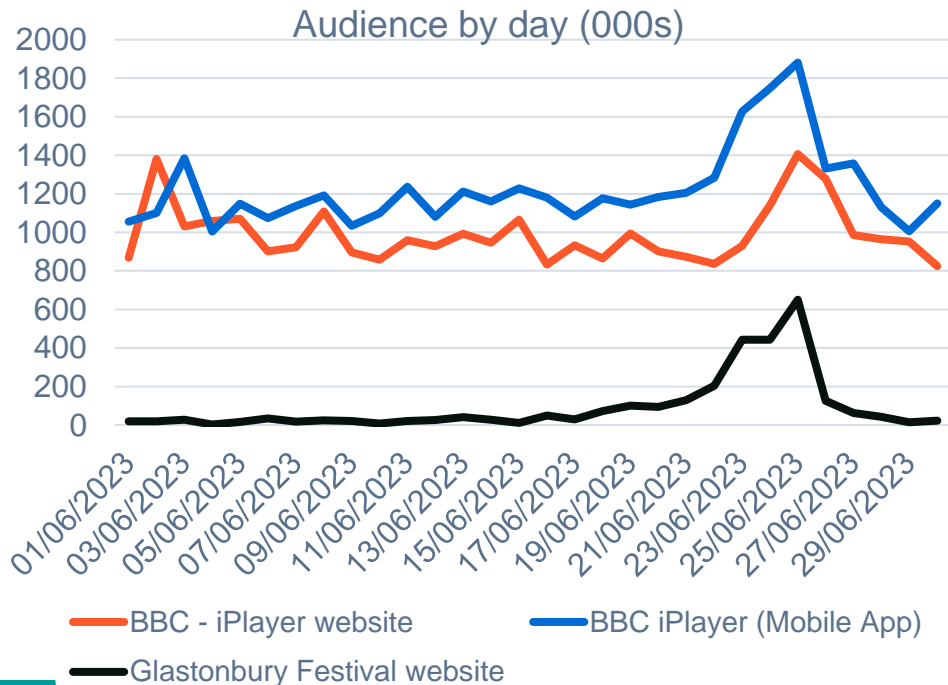


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Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

The Glastonbury effect...



Audience to BBC iPlayer increased over the days of the Glastonbury Festival with Sunday 26th attracting the highest audience in the month for both website and app



BBC iPlayer (app & website)	Daily Audience (000s)	Daily Mins (MM)
25/6/2023	3,102	114
June Average	2,113	77

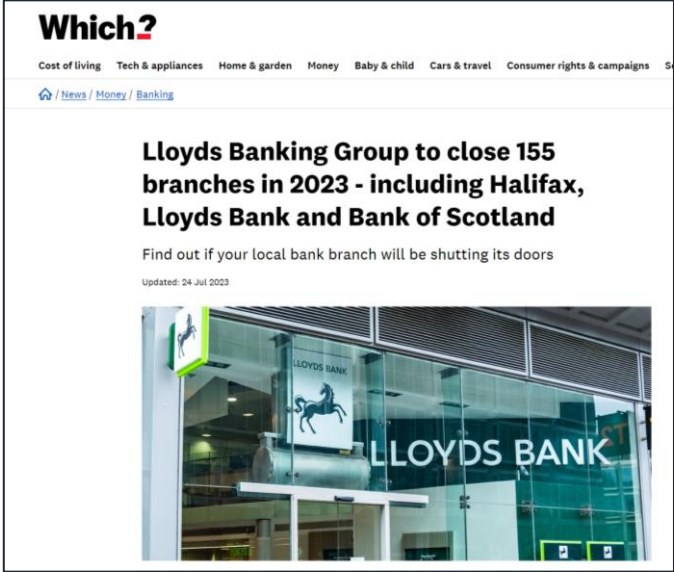
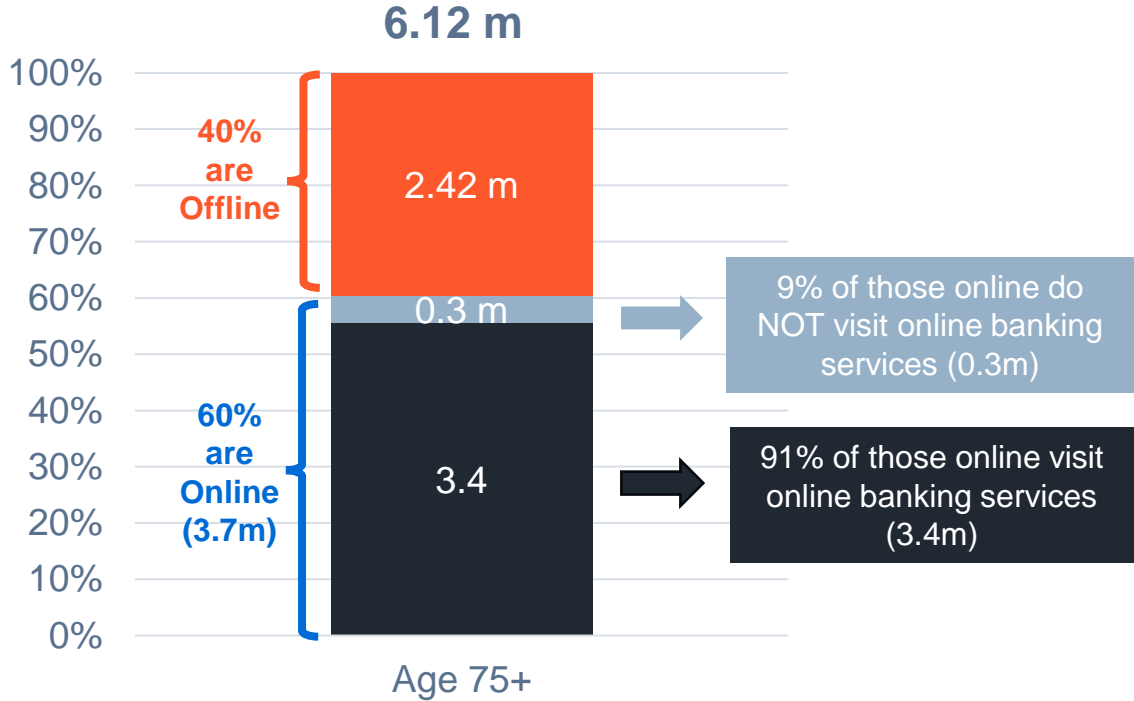
Source: UKOM Ipsos iris Online Audience Measurement Service, June 2023

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



Online banking among those aged 75+

44% of those aged 75+ currently do not use online banking services



Source: UKOM Ipsos iris Online Audience Measurement Service, June 23. Offline data & population comes from the PAMCo establishment survey (April-Sept 23) universe data



Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

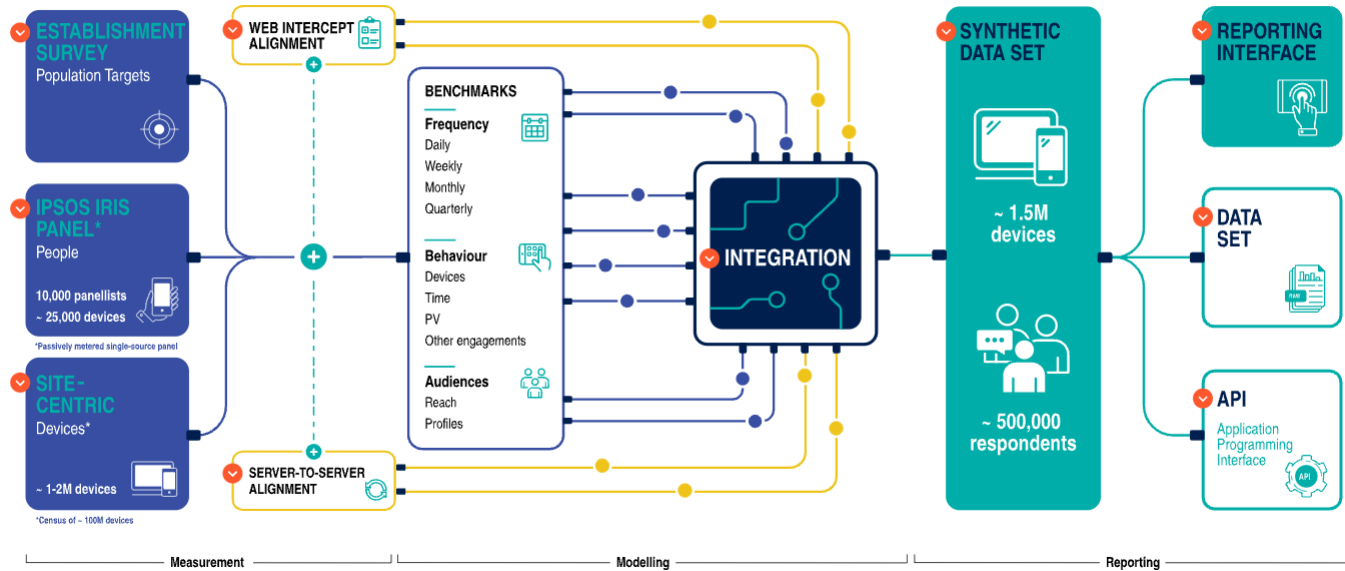
Methodology



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 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>