

UKOM

**Online Market
Overview**

March 2024



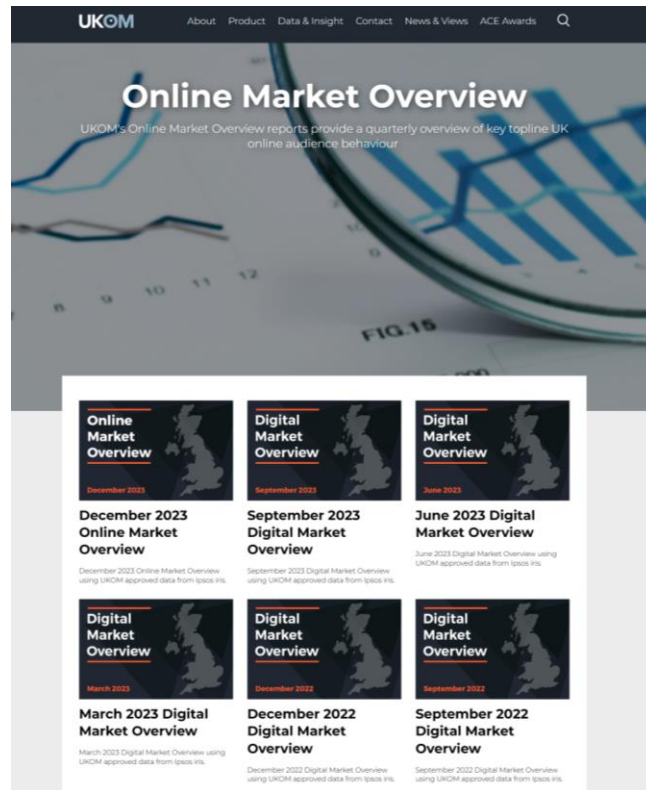
The UK Online Market Overview March 2024



This Online Market Overview focuses on UK online audience on PC, tablet and smartphone in March 2024

Ipsos iris launched in 2021 as the new UKOM endorsed industry standard for the measurement of UK online audience behaviour.

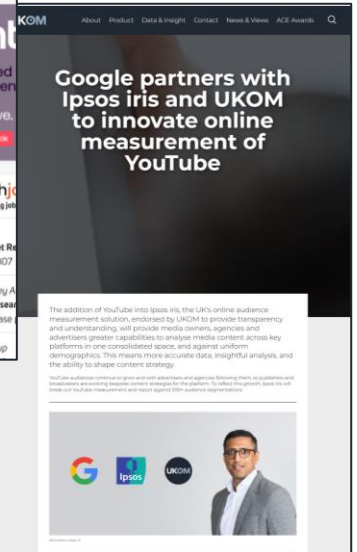
Consolidated in one PDF, this is a starting point to learn more about the online audiences of companies in the headlines as well as a deep dive into the top online companies and brands in the UK



For the first time, YouTube Video content owner data has been reported in Ipsos iris at an organisation level



- From January 2024 onwards, YouTube video data has been incorporated into Ipsos iris using a server-to-server integration. In January and February this data is only reported under YouTube. This will impact YouTube's data.
- From March 2024 onwards, YouTube Content Owners break outs are reported under and contribute to the publishers' organisations e.g. Sky, News UK etc. This may affect rankings at the Organisation level.
- The following metrics are now available: Avg. Daily Video Audience, Avg. Daily Video Minutes and Avg. Daily Video Views.



Contents

The UKOM logo is a white circle containing the text 'UKOM' in a bold, sans-serif font. The background of the slide features a dark grey, high-angle view of several electronic devices, including a laptop on the right and a tablet at the bottom, with their screens and keyboards visible.

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- **YouTube data – a first look**



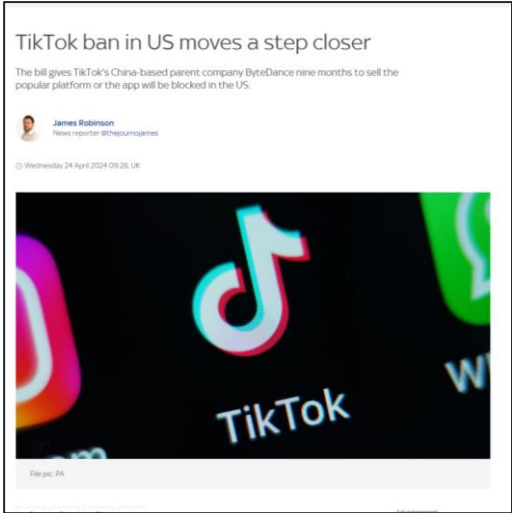
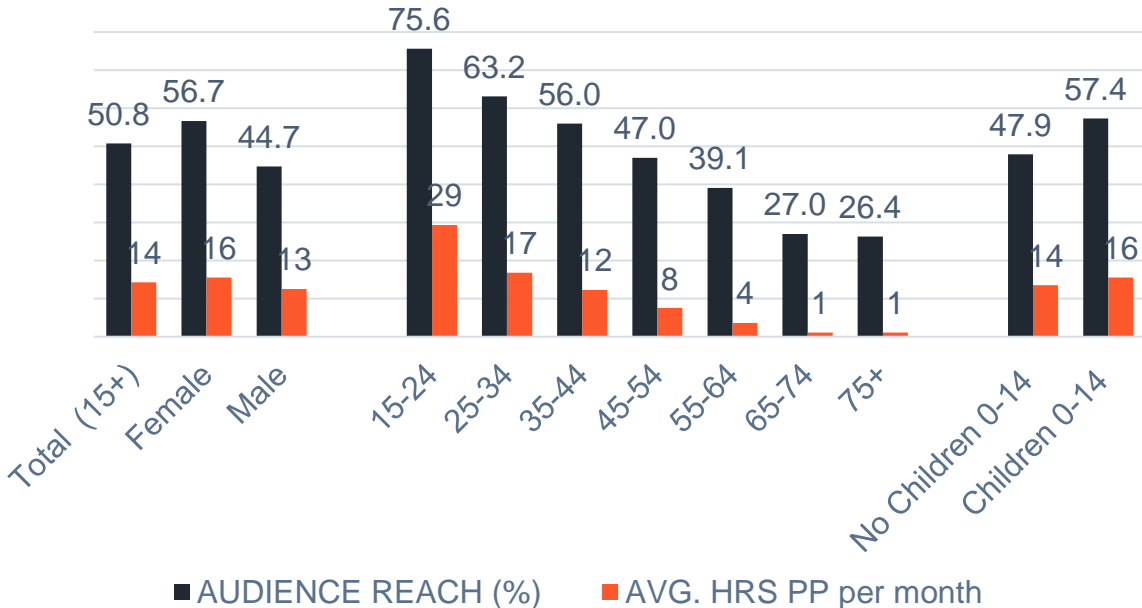
In the news



US ban looms but TikTok UK growth continues reaching 1/2 of online population



TikTok reach (%) & average hrs pp per month



| | MAR '23 | MAR '24 | Change (%) | Change (abs) |
|--------------------|---------|---------|------------|--------------|
| Audience (000s) | 22,346 | 25,287 | +13.2% | +2,941 |
| Audience Reach (%) | 44.8 | 50.8 | +13.5% | +6.02 |

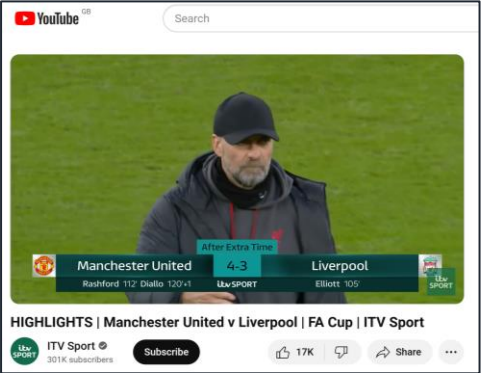
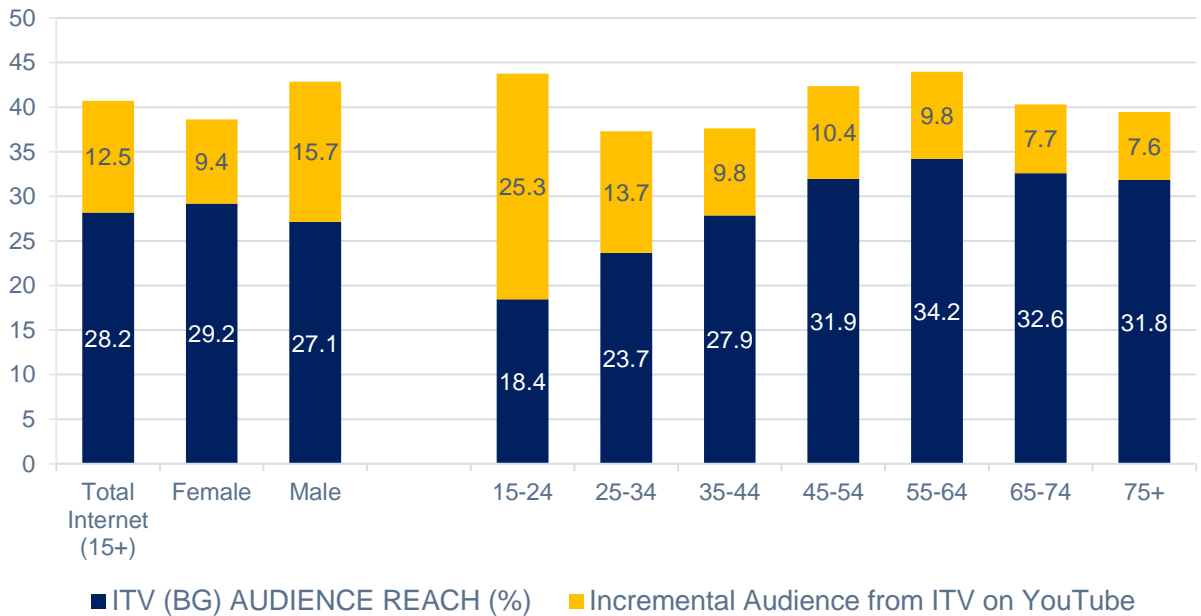
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



ITV content on YouTube in March adds incremental reach for ITV, particularly among younger audiences



ITV Online brand reach and incremental reach from ITV's video content on YouTube (%)



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. ITV (BG) = ITV Brand Group – including ITV websites and ITV apps

Octopus grows audience as UK customers migrate after Shell Energy closure



| | AUDIENCE (000S) | | | |
|--------------------------------|-----------------|---------|------------|--------------|
| | DEC '23 | MAR '24 | Change (%) | Change (abs) |
| Total Energy Suppliers/Utility | 23,196 | 23,059 | -0.6% | -137 |
| Octopus Energy | 4,549 | 5,465 | 20.1% | +916 |
| British Gas | 3,823 | 3,175 | -17.0% | -648 |
| E.ON | 3,121 | 2,834 | -9.2% | -288 |
| EDF Energy | 2,378 | 2,321 | -2.4% | -57 |
| Ovoenergy | 1,928 | 1,774 | -8.0% | -154 |
| Scottish Power | 1,585 | 1,515 | -4.4% | -70 |
| Shell Energy | 1,554 | 755 | -51.4% | -799 |

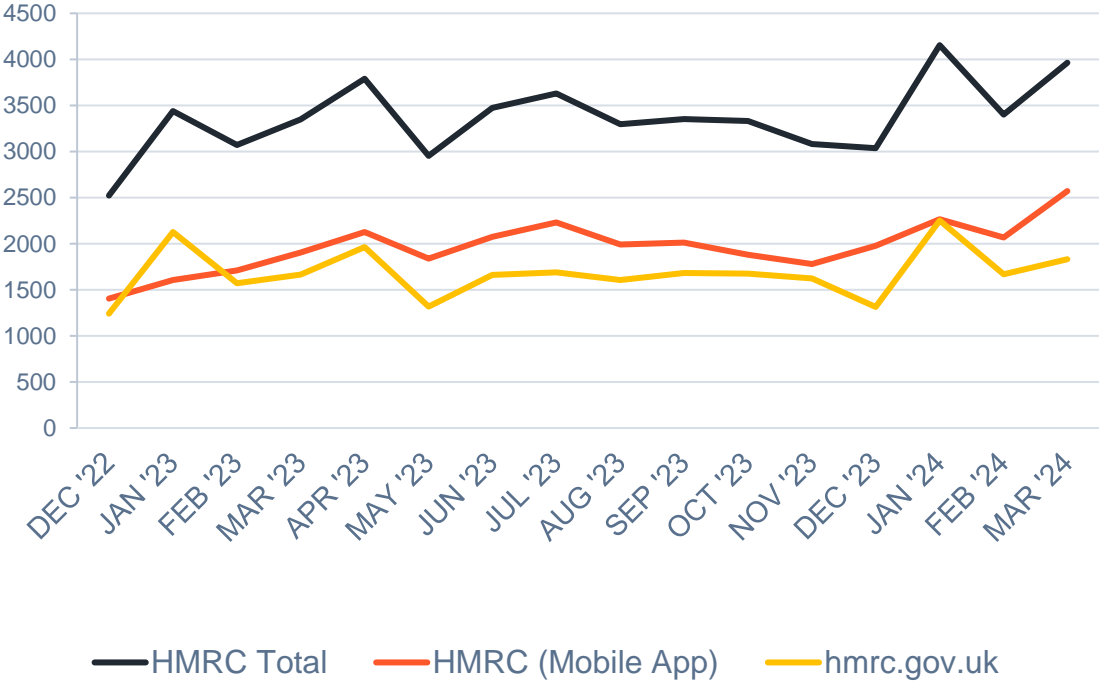


Source: Ipsos iris Online Audience Measurement Service, Dec 23-Mar 2024
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Over 3 million visit HMRC online each month with app reach overtaking the website – except among over 65s



Online audience by month (000s)

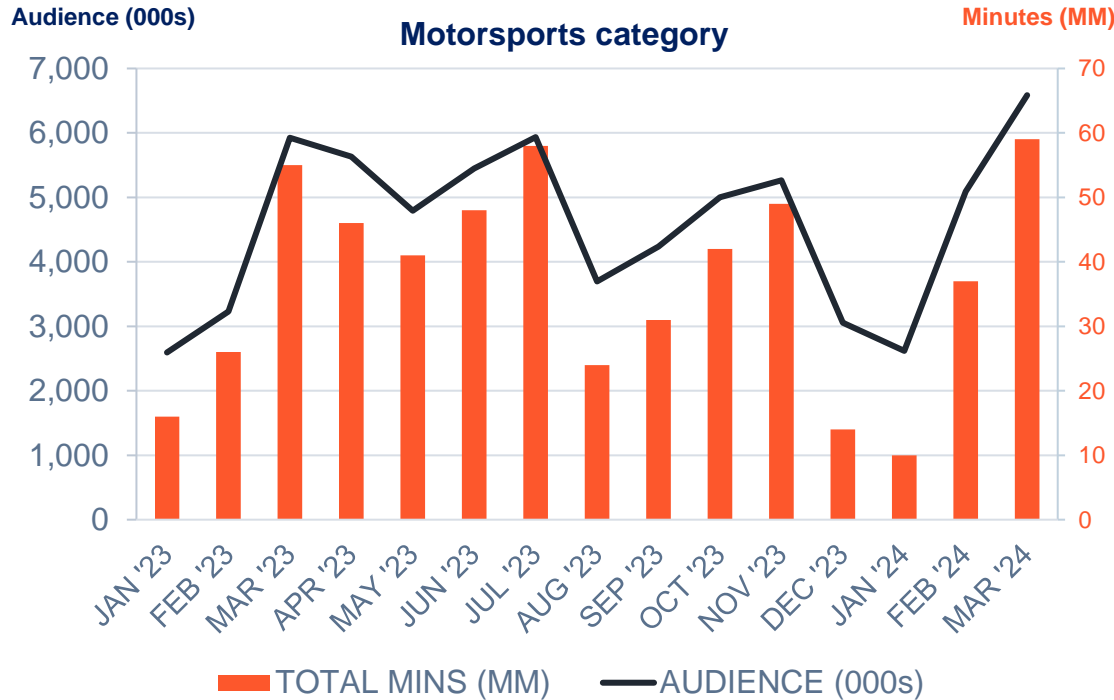


| | AUDIENCE REACH (%) | |
|-----------------|--------------------|-----|
| March 2024 | Total 15+ | 65+ |
| Total HMRC | 8.0 | 5.6 |
| HMRC.gov.uk | 3.7 | 3.4 |
| HMRC Mobile app | 5.2 | 2.7 |



Source: Ipsos iris Online Audience Measurement Service, Dec 22-Mar 2024
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Interest in motorsport peaks in March as F1 season and Christian Horner story both kick off



| Month | Audience (000s) | Reach (%) | Total Minutes (MM) |
|------------|-----------------|-----------|--------------------|
| March 2024 | 6,582 | 13.2 | 59 |
| Motorsport | 6,582 | 13.2 | 59 |

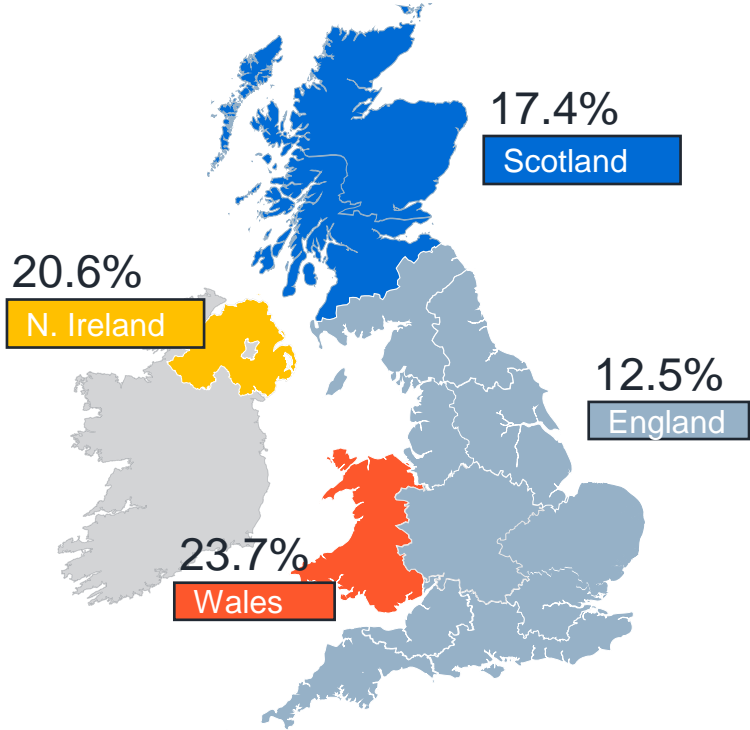


Source: Ipsos iris Online Audience Measurement Service, Dec 23-Mar 2024
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Wales wins for rugby interest online – even if they fail in The Six Nations



Rugby category online audience reach



| Six Nations 2024 | | | | | | |
|------------------|---------|------|---|---|-----------|----|
| 2024 Season | | | | | | |
| Team | MATCHES | NEWS | | | STANDINGS | |
| | | GP | W | D | L | PD |
| 1 Ireland | 5 | 4 | 0 | 1 | 84 | 20 |
| 2 France | 5 | 3 | 1 | 1 | 6 | 15 |
| 3 England | 5 | 3 | 0 | 2 | -5 | 14 |
| 4 Scotland | 5 | 2 | 0 | 3 | 0 | 12 |
| 5 Italy | 5 | 2 | 1 | 2 | -34 | 11 |
| 6 Wales | 5 | 0 | 0 | 5 | -51 | 4 |

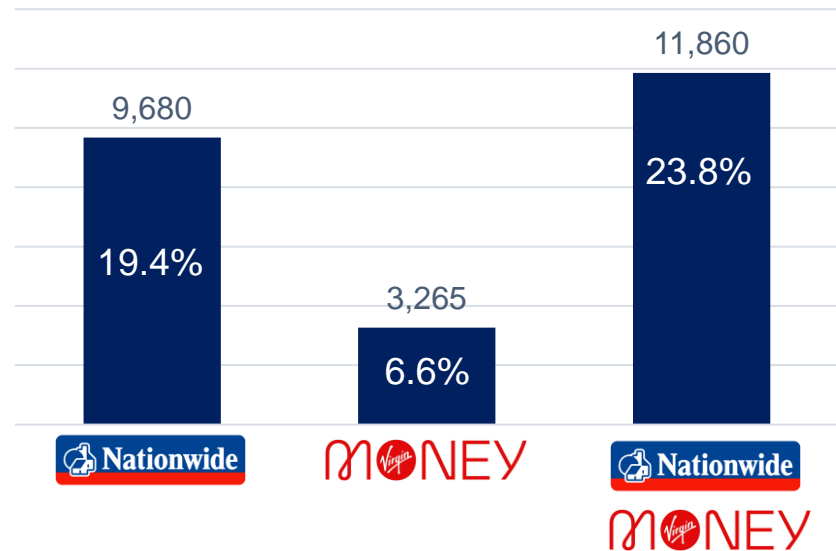


Source: Ipsos iris Online Audience Measurement Service, Mar 2024
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Nationwide and Virgin combine to beat the online reach of rivals



Online audience (000s) & reach (%)



| Top 3 Banks - Mar 24 | AUDIENCE (000s) | AUDIENCE REACH (%) |
|----------------------|-----------------|--------------------|
| Santander | 11,348 | 22.8 |
| Barclays | 11,280 | 22.7 |
| NatWest | 10,059 | 20.2 |

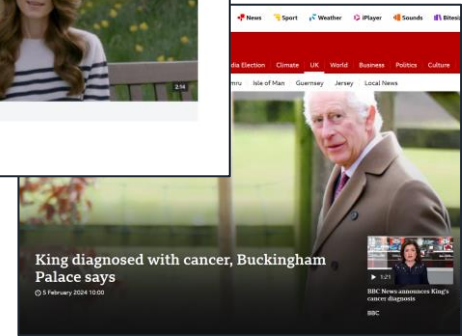
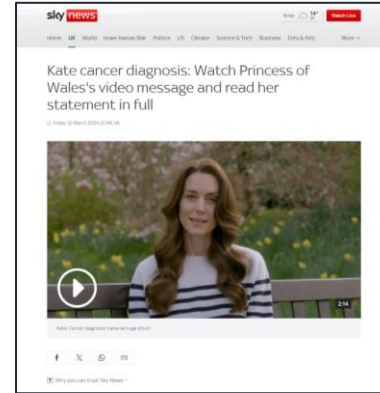


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Royal cancer stories drive biggest news days in February and March



General News online audience (000s)



| | Daily Audience (000s) | Daily Reach (%) |
|------------------|-----------------------|-----------------|
| 05/02/2024 | 28,475 | 57.2 |
| February Average | 26,652 | 53.6 |
| 22/03/2024 | 28,309 | 56.8 |
| March Average | 26,510 | 53.2 |

Source: UKOM Ipsos iris Online Audience Measurement Service, Feb 2024 and Mar 2024

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 23,500 rather than 0 to better illustrate the uplift



The UK online audience

UKOM



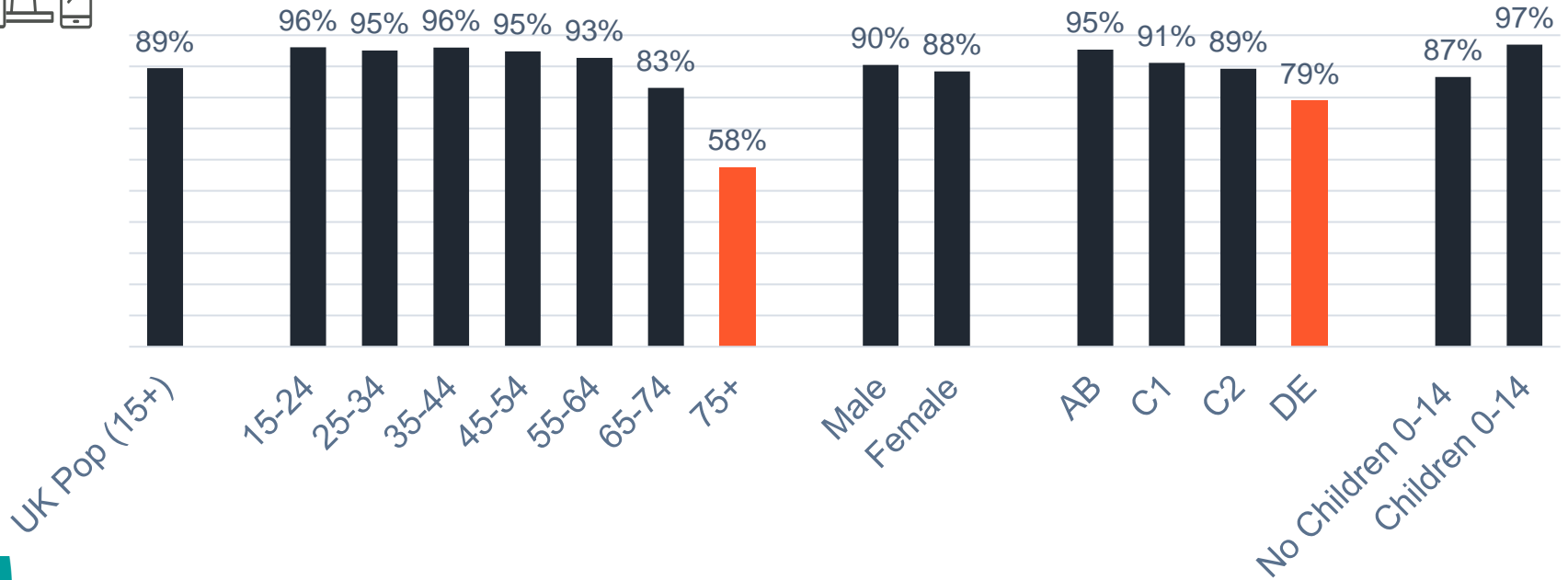
Internet penetration by demographics – Q1 2024



89% of the UK population use the internet on a PC, mobile or tablet – this is lower among those aged 75+ and social grades DE, and higher among under 24s and parents with children at home



% of UK population who use the internet



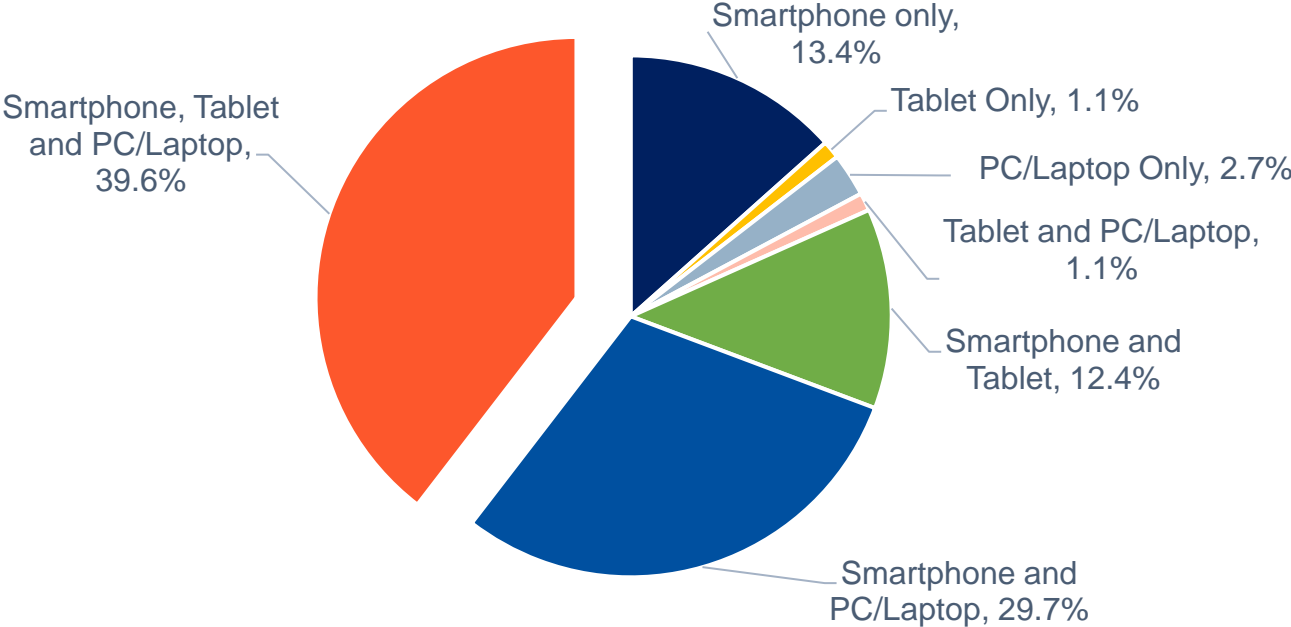
Source: UKOM Ipsos iris Online Audience Measurement Service, Establishment survey Oct 2023 - Mar 2024

Base – Total UK Population (15+)

Device ownership by internet population – Q1 2024



Almost 40% own a smartphone, tablet AND PC or laptop

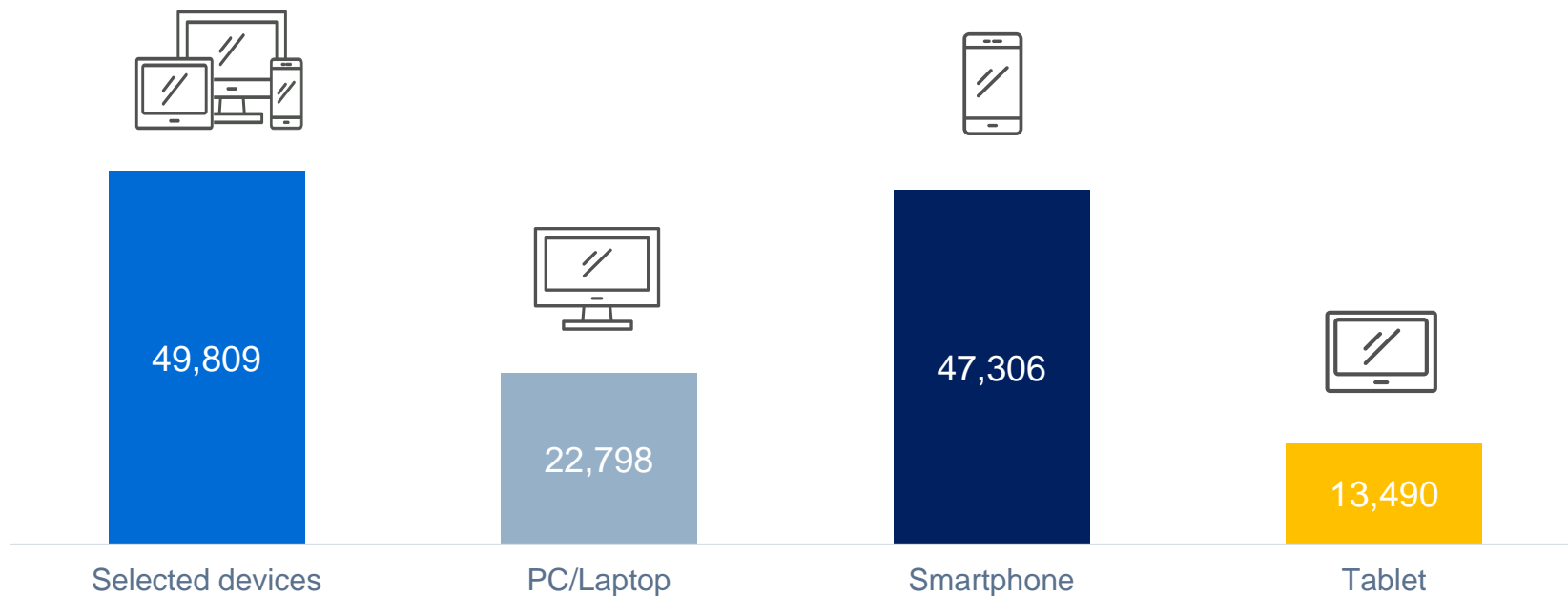


Source: UKOM Ipsos iris Online Audience Measurement Service, Establishment Survey Oct 2023 – Mar 2024

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

Online audience by devices used (000s)

More than twice as many people use smartphones than computers



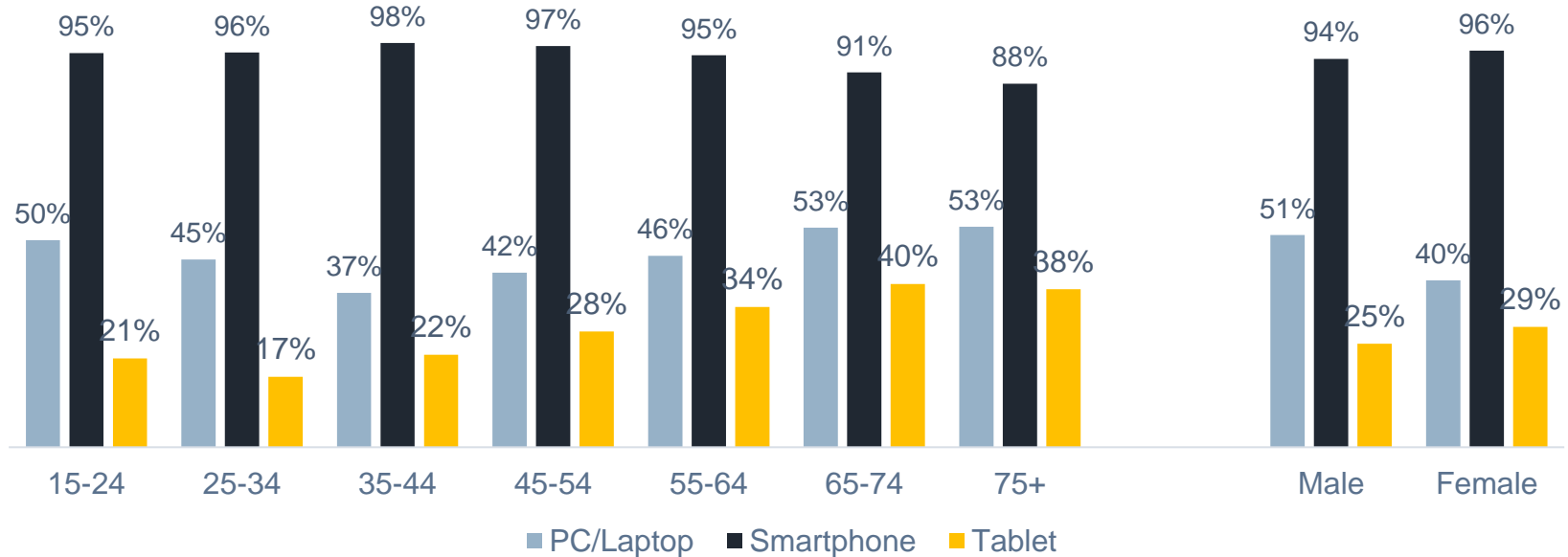
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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

Devices used to go online by age and gender (%)



Older audiences are more likely to use a tablet. Males are more likely than females to use a PC



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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

Time online

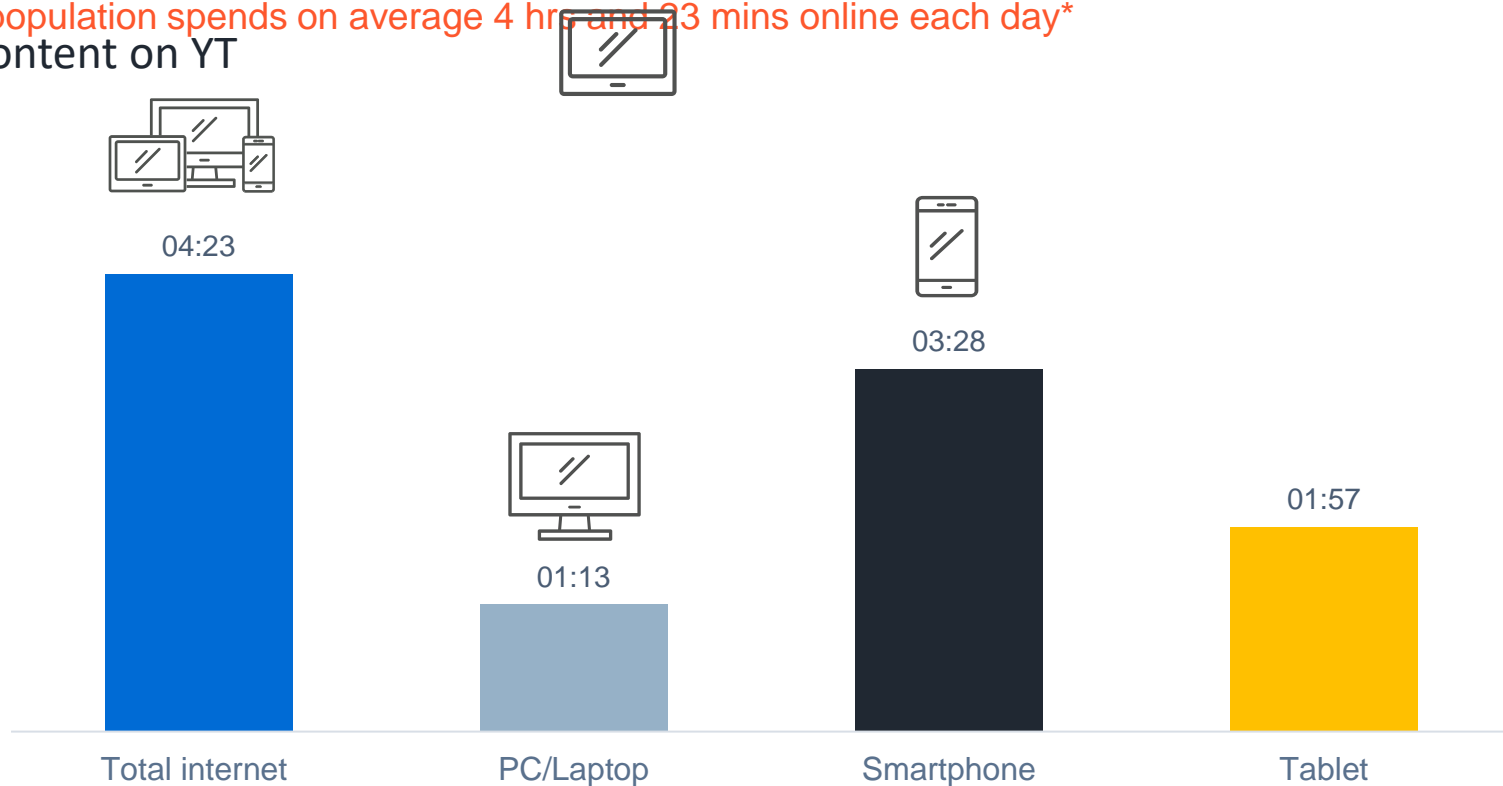


Average time spent online per day by device (hh:mm)



The UK population spends on average 4 hrs and 23 mins online each day*

on video content on YT



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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

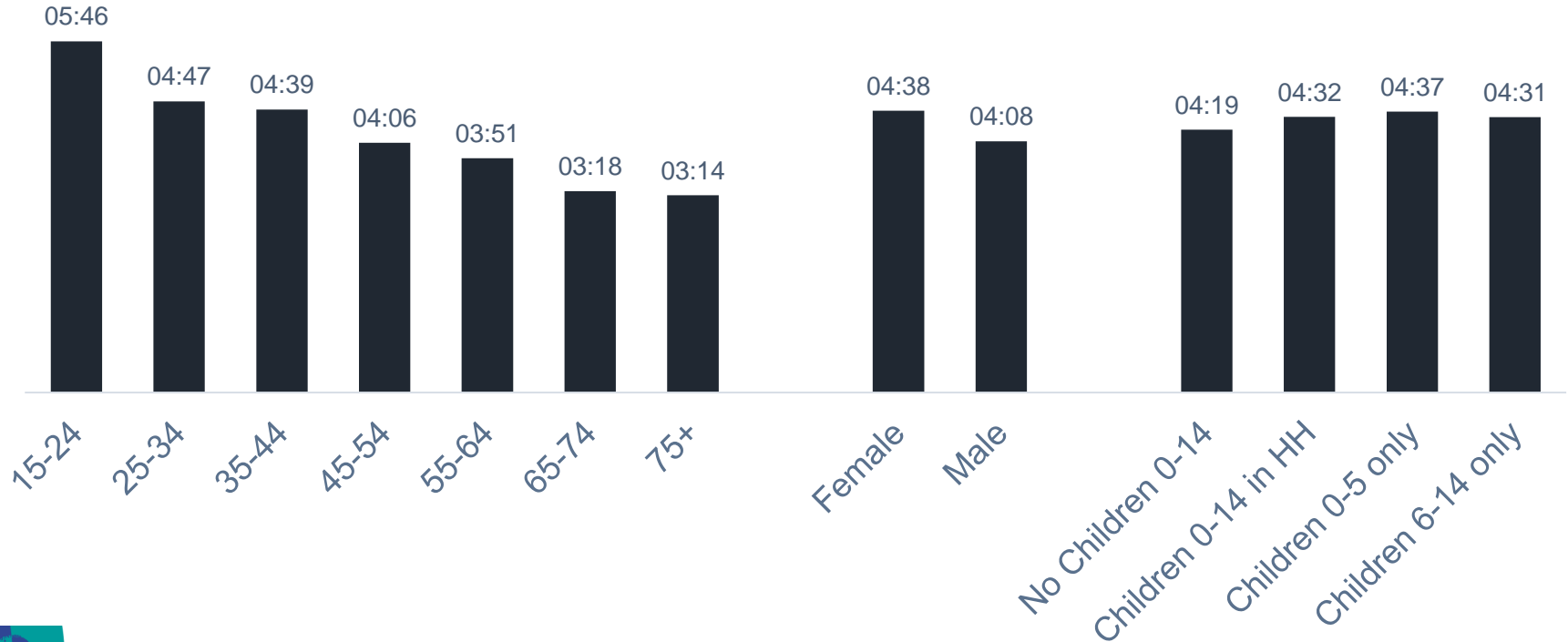
*Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube and organisations with video content on YouTube may be higher from Mar 2024

Average time spent online per day by demographics



Younger audiences, females and parents of young children spend more time online

(hh:mm)



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

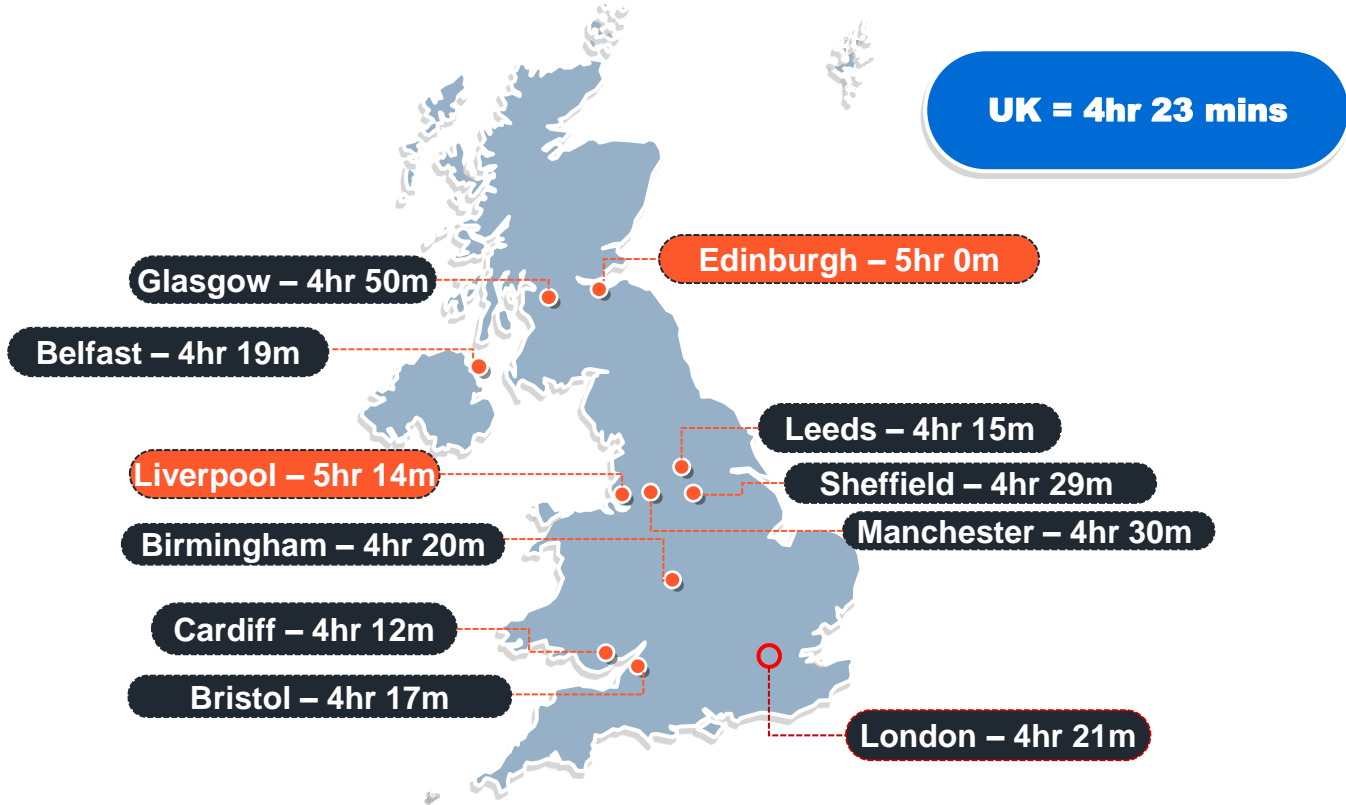
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube and organisations with video content on YouTube may be higher from Mar 2024





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

Of the major UK cities, residents of Edinburgh & Liverpool spent most time online per day in March

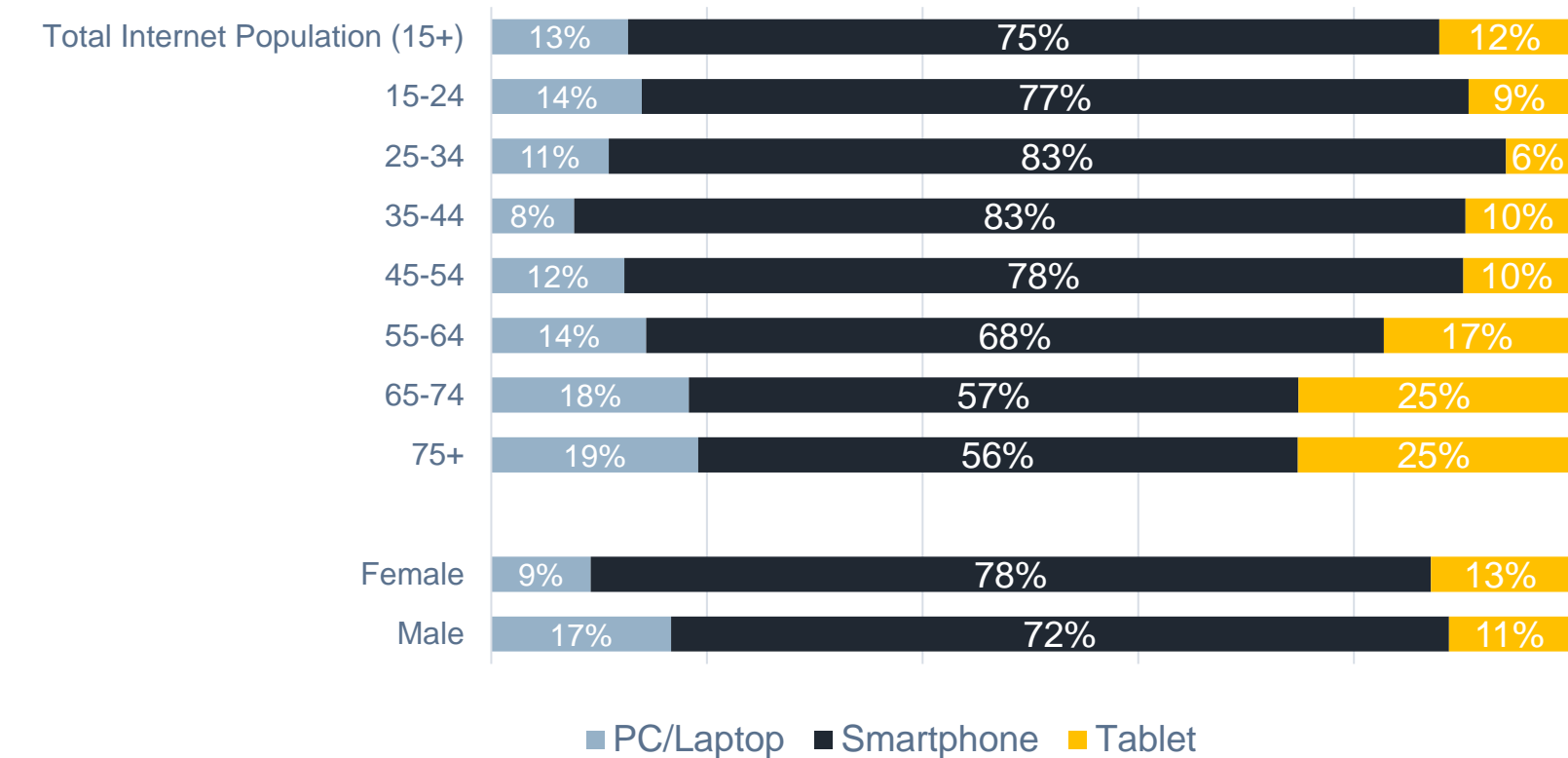


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube and organisations with video content on YouTube may be higher from Mar 2024

Device share of minutes by age and gender

Older audiences spend a greater share of time on computers and tablets



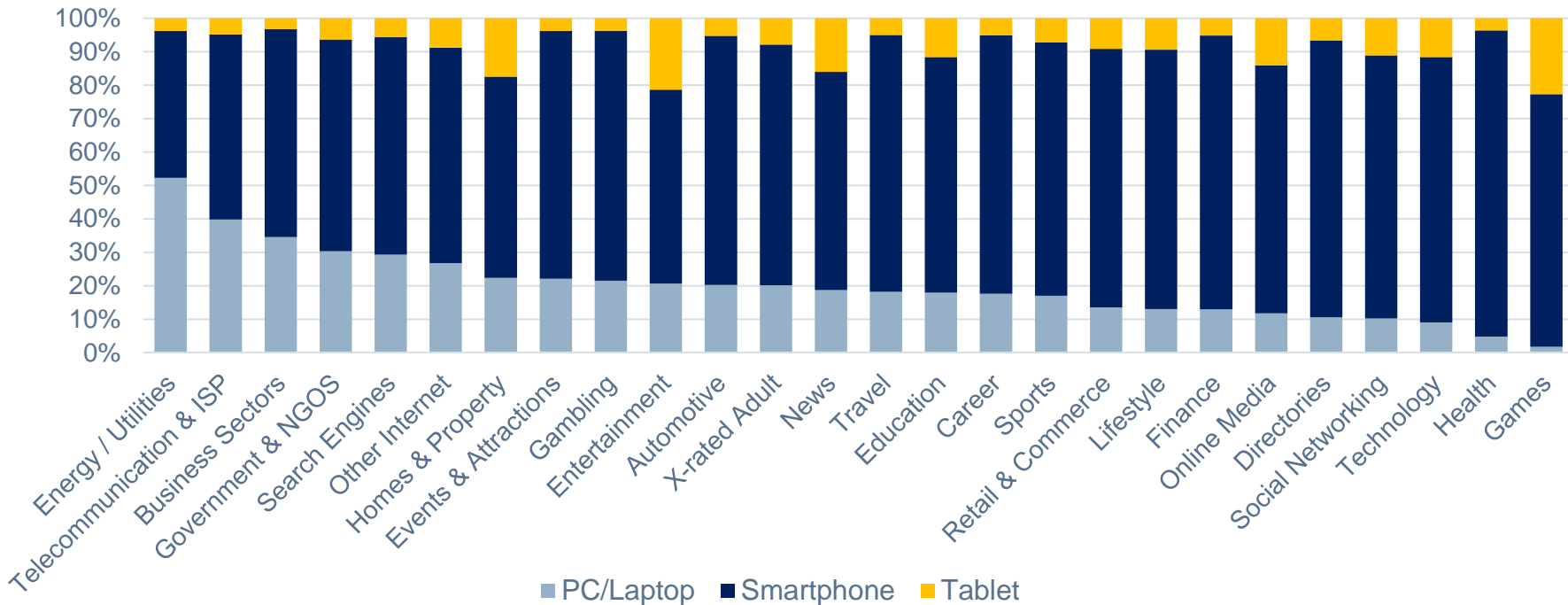
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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

Share of minutes (%) by device by category



Content type influences choice of device. Energy/utilities is now the only category where computers account for the most time. Tablets perform well for entertainment and gaming



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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

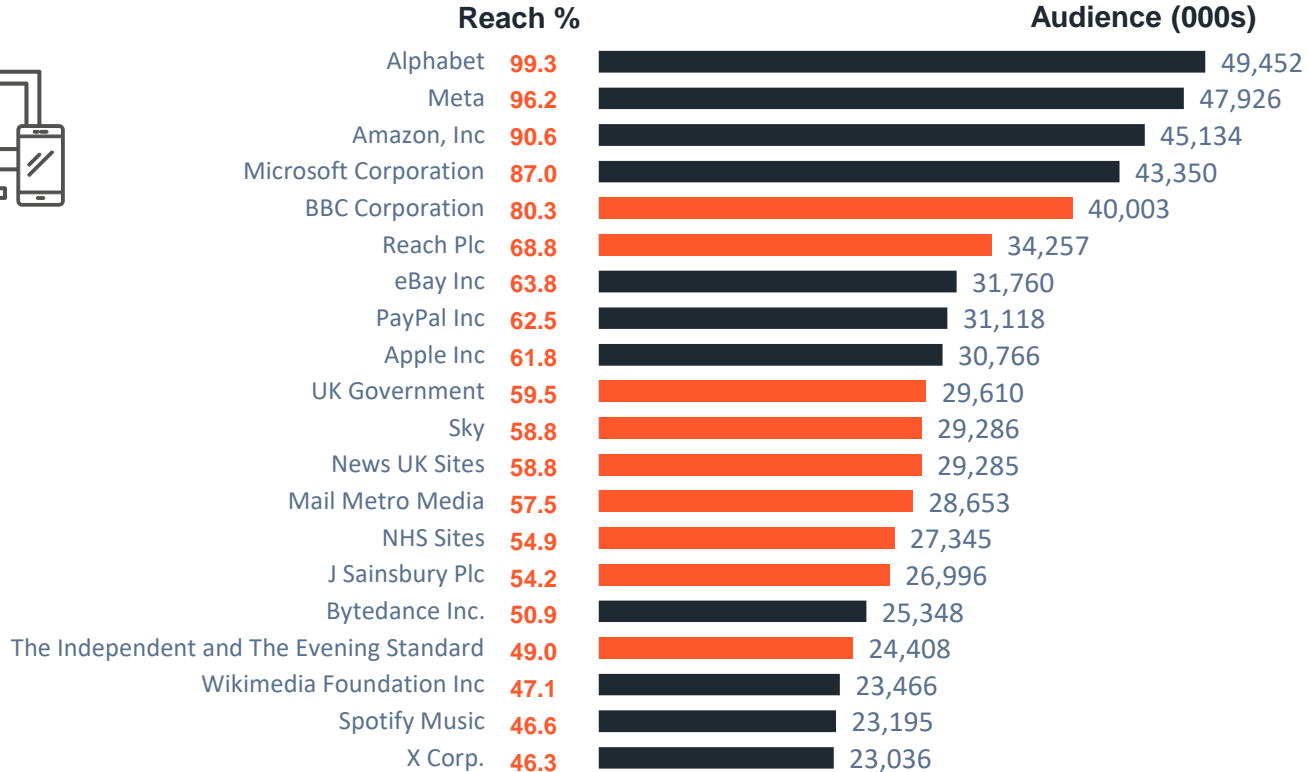
NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'. *Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube and organisations with video content on YouTube may be higher from Mar 2024

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



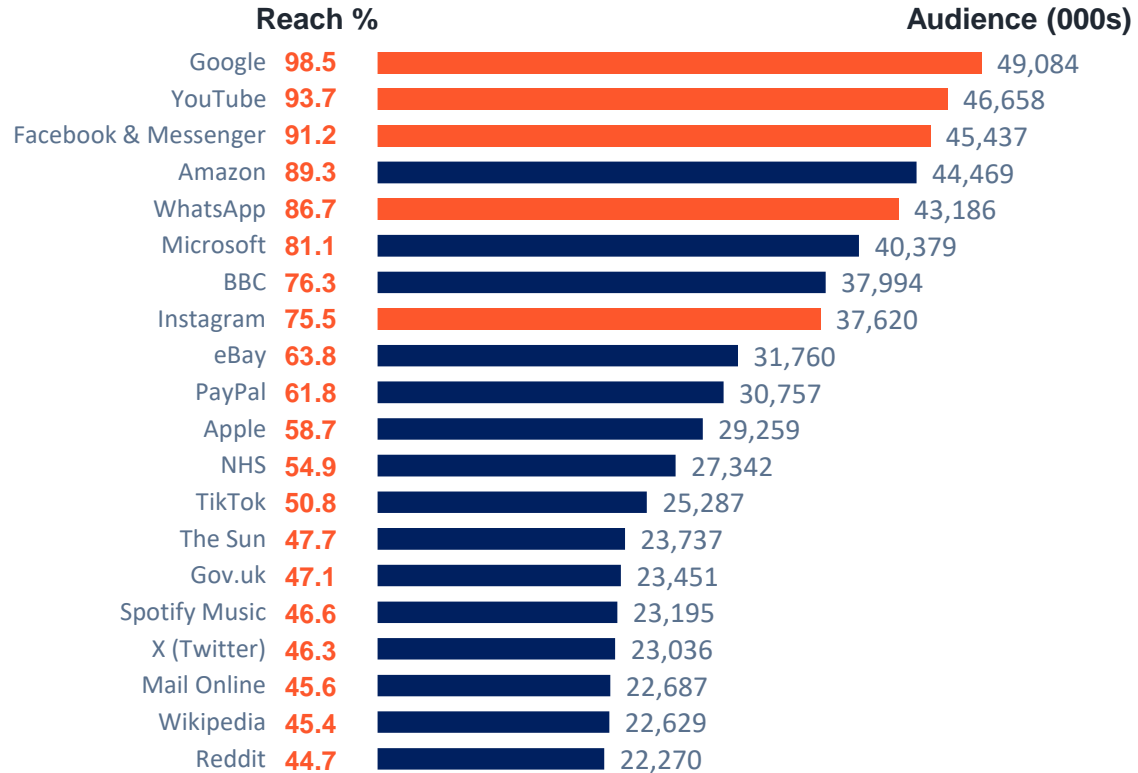
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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, Mar 2024

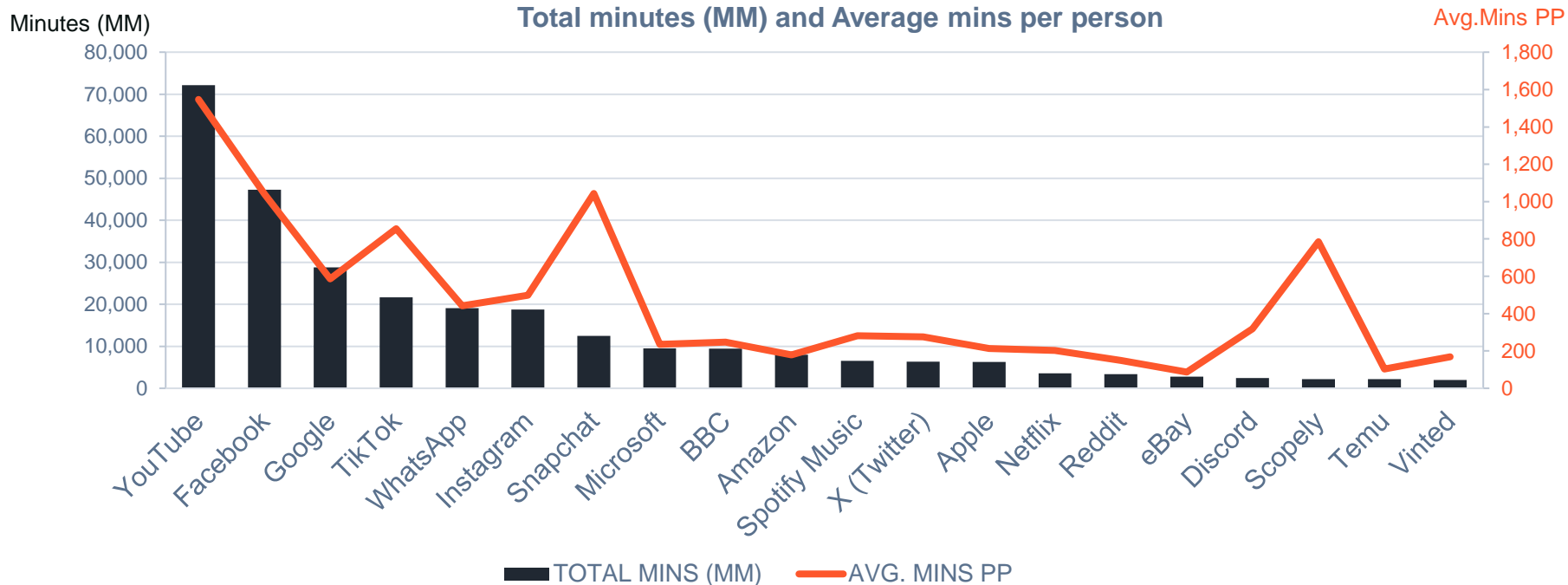
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.



Top 20 brands by time spent



High average time per person for Snapchat and Scopely (Monopoly Go) propel them into the top 20 for minutes



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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'. *Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube may be higher from Mar 2024

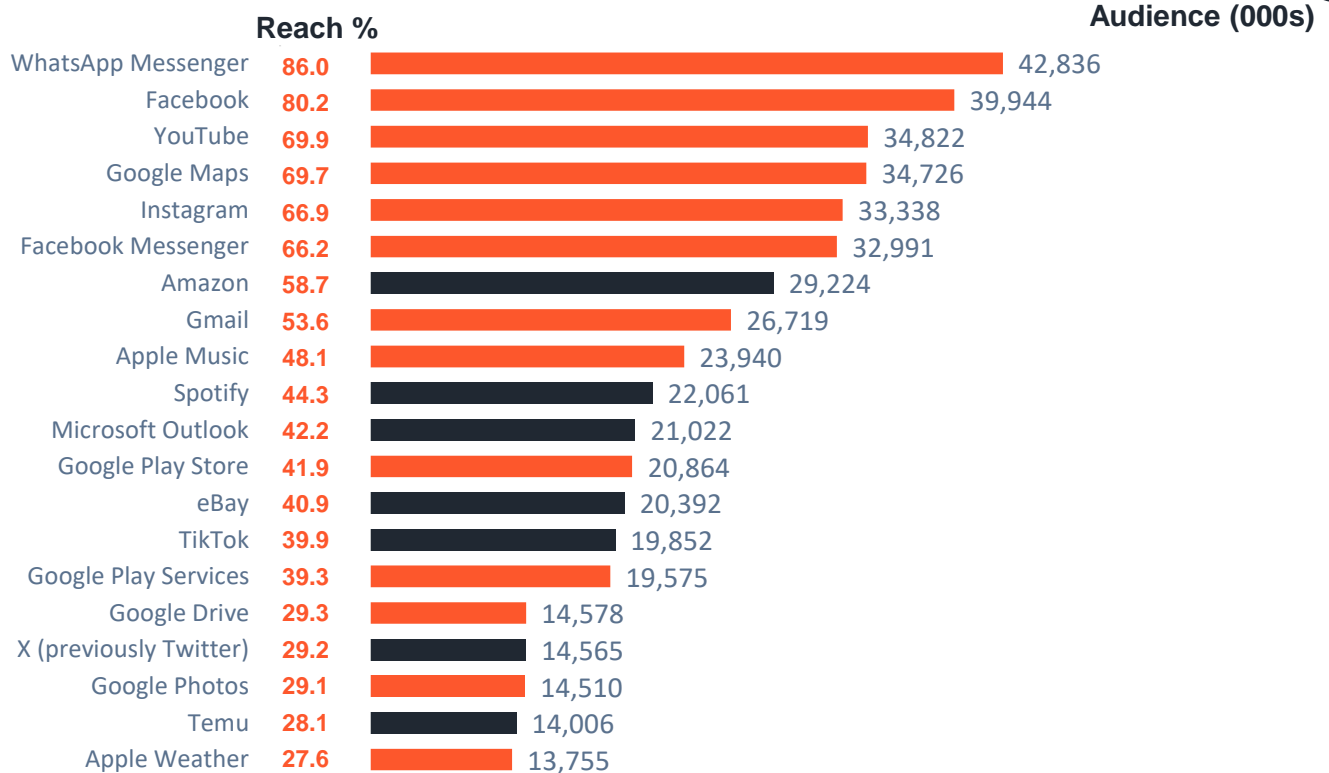


Top mobile apps



Top 20 mobile apps by audience

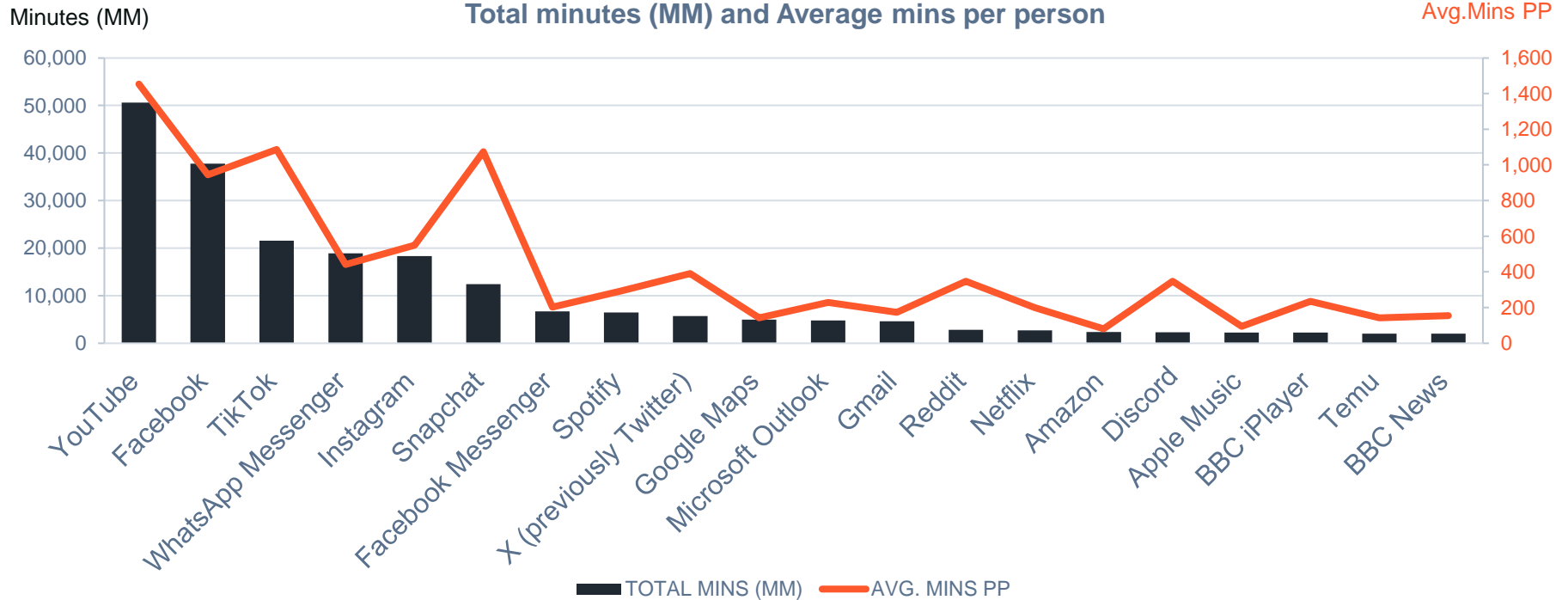
Apps from Meta, Android and Apple dominate the top 20



Top 20 mobile apps by time spent



Video, social media and music dominate time spent on mobile apps



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24

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'. *Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube may be higher from Mar 2024

Top 10 apps by minutes by mobile device



Video viewing apps rank high on tablets for time spent.



Smartphone Top 10

| | MEDIA | TOTAL MINS (MM) | AVG. MINS PP |
|----|------------------------|-----------------|--------------|
| 1 | YouTube | 35,706 | 1081:33 |
| 2 | Facebook | 34,268 | 880:02 |
| 3 | TikTok | 20,690 | 1083:33 |
| 4 | WhatsApp Messenger | 18,779 | 440:13 |
| 5 | Instagram | 17,581 | 544:32 |
| 6 | Snapchat | 12,333 | 1074:55 |
| 7 | Spotify | 6,027 | 282:30 |
| 8 | Facebook Messenger | 5,996 | 186:22 |
| 9 | X (previously Twitter) | 5,085 | 360:03 |
| 10 | Google Maps | 4,729 | 139:11 |



Tablet Top 10

| | MEDIA | TOTAL MINS (MM) | AVG. MINS PP |
|----|---------------------|-----------------|----------------|
| 1 | YouTube | 14,892 | 2488:55 |
| 2 | Facebook | 3,465 | 531:17 |
| 3 | BBC iPlayer | 1,330 | 488:35 |
| 4 | Netflix | 1,156 | 374:39 |
| 5 | TikTok | 885 | 587:15 |
| 6 | Gmail | 728 | 206:57 |
| 7 | Instagram | 718 | 196:01 |
| 8 | Facebook Messenger | 699 | 178:00 |
| 9 | Microsoft Outlook | 673 | 302:42 |
| 10 | YouTube Kids | 643 | 1725:40 |



Source: Ipsos, Ipsos iris Online Audience Measurement Service, Mar 24

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'. *Due to the enhanced YouTube measurement, overall internet time and time spent on YouTube may be higher from Mar 2024



Key changes: Dec 23 – Mar 24

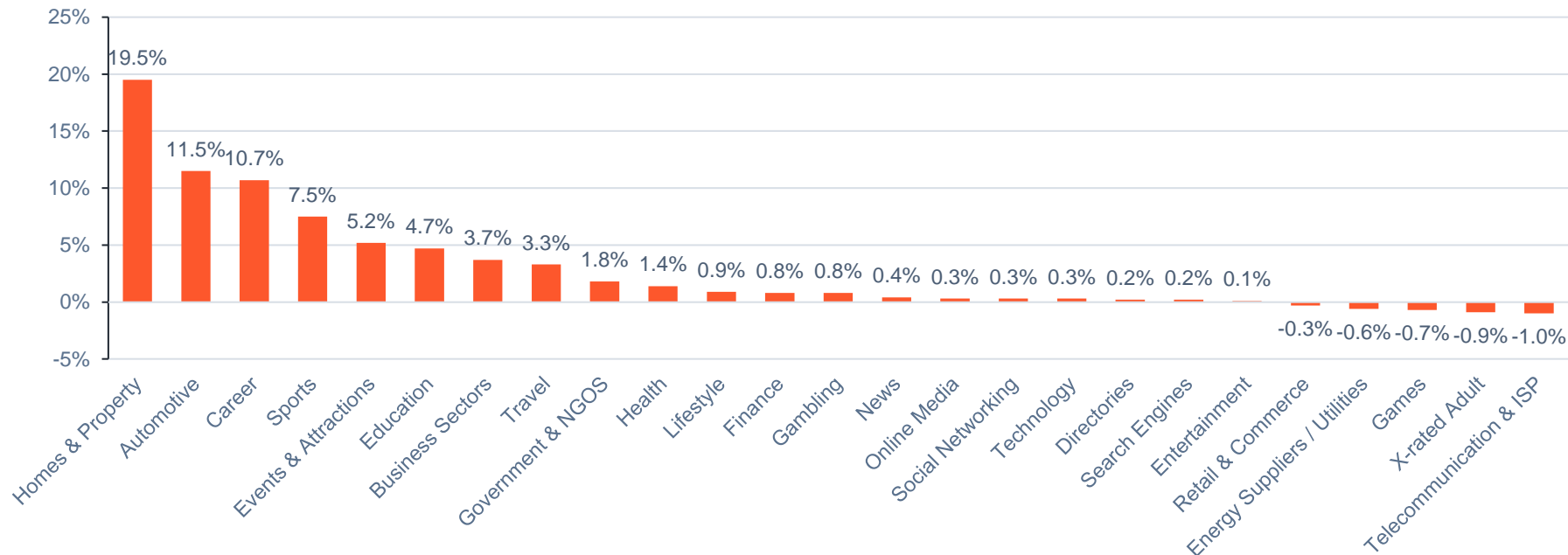


Tier 1 category audience change (%): Dec 23 - Mar 24



Attention turns to house hunting in March - the Property category audience is 20% higher than in December

Audience % change: Dec 23 - Mar 24



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 23 and Mar 24

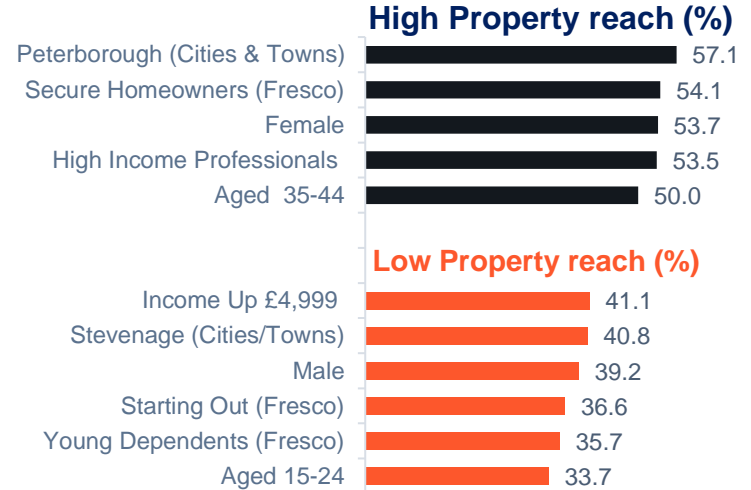
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

Home and Property category: audience & reach



OnTheMarket's audience has doubled since December, but Rightmove is still the market leader by some distance. Interest in Property varies by target audience

| | AUDIENCE (000S) | | | AUDIENCE REACH (%) | | |
|---------------------|-----------------|---------|------------|--------------------|---------|------------|
| | DEC '23 | MAR '24 | Change (%) | DEC '23 | MAR '24 | Change (%) |
| Total Home/Property | 19,384 | 23,159 | 19.5% | 39.0 | 46.5 | 19.2% |
| Rightmove | 12,076 | 14,736 | +22.0% | 24.3 | 29.6 | +21.8% |
| Zoopla | 5,494 | 6,648 | +21.0% | 11.1 | 13.4 | +20.7% |
| OnTheMarket | 2,417 | 4,837 | +100.2% | 4.9 | 9.7 | +99.8% |
| Ideal Home | 1,552 | 1,584 | +2.1% | 3.1 | 3.2 | +1.9% |
| PrimeLocation | 1,044 | 1,533 | +46.9% | 2.1 | 3.1 | +46.7% |



Females, high income professionals and those aged 35-44 are more likely to visit property sites and apps online



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24

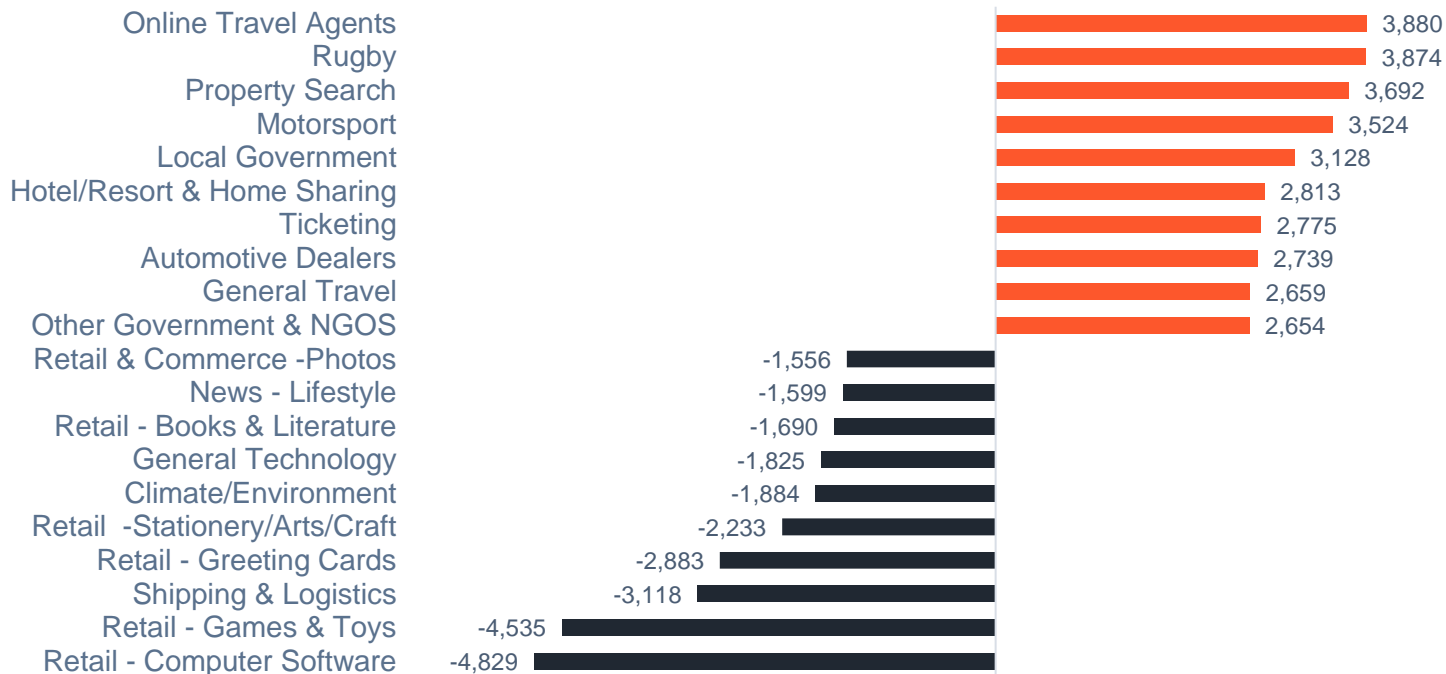
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Tier 2 category changes: winners and losers

Online Travel Agents and Rugby added the biggest absolute audience between December and March



Audience change (000s) - Dec 23 – Mar 24



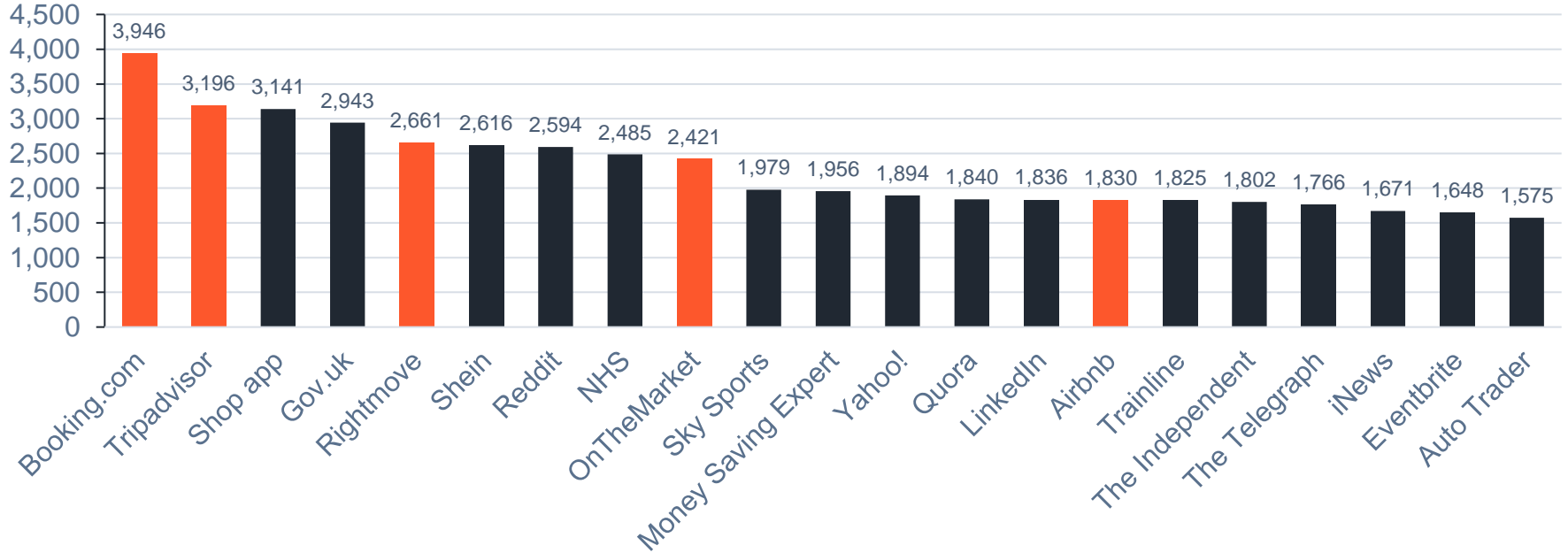
Source: Ipsos iris Online Audience Measurement Service, Dec 23 – Mar 24
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Brands adding most audience : Dec 23 – Mar 24



While December was all about Retail, attention turns to Travel in March with booking.com, Tripadvisor and Airbnb being the major audience winners. Rightmove and OnTheMarket also feature in the top 10

Audience gain (000s): Dec 23 – Mar 24



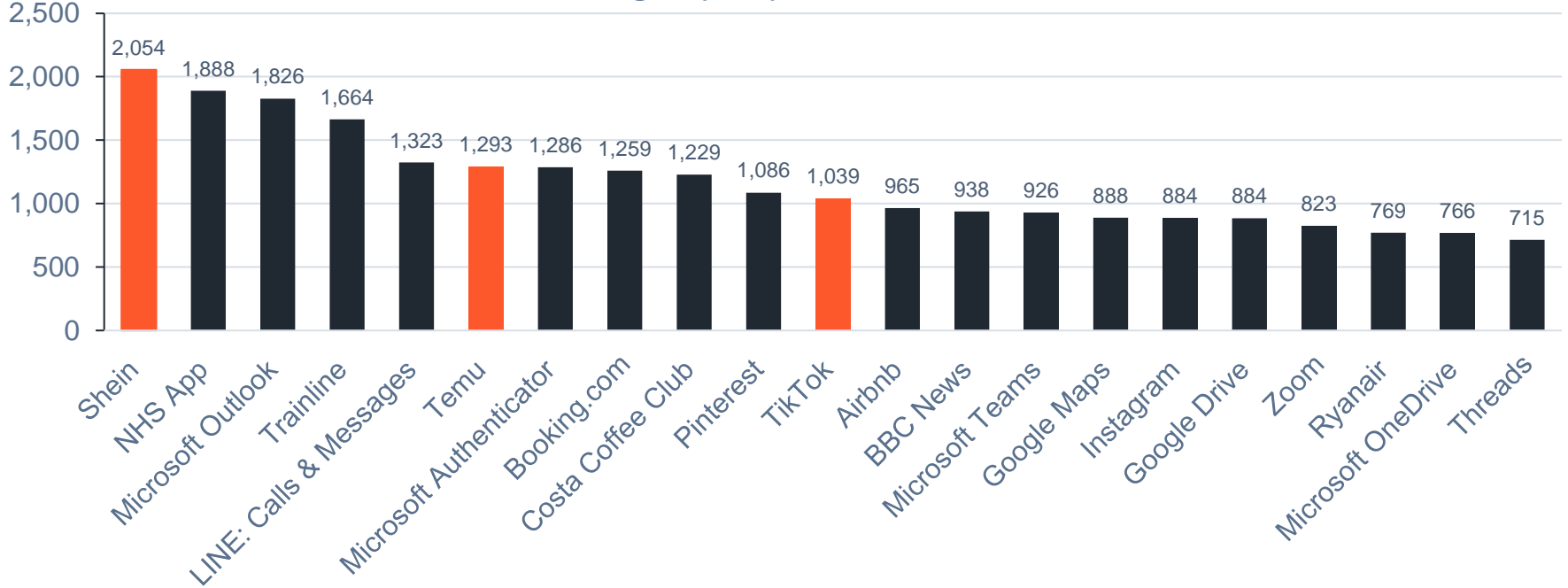
Source: Ipsos iris Online Audience Measurement Service, Dec 23 – Mar 24
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Mobile apps adding most audience : Dec 23 – Mar 24

The Chinese-owned online brands - Shein, Temu and TikTok - continue to grow



Audience gain (000s): Dec 23 – Mar 24



Source: Ipsos iris Online Audience Measurement Service, Dec 23 – Mar 24
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.



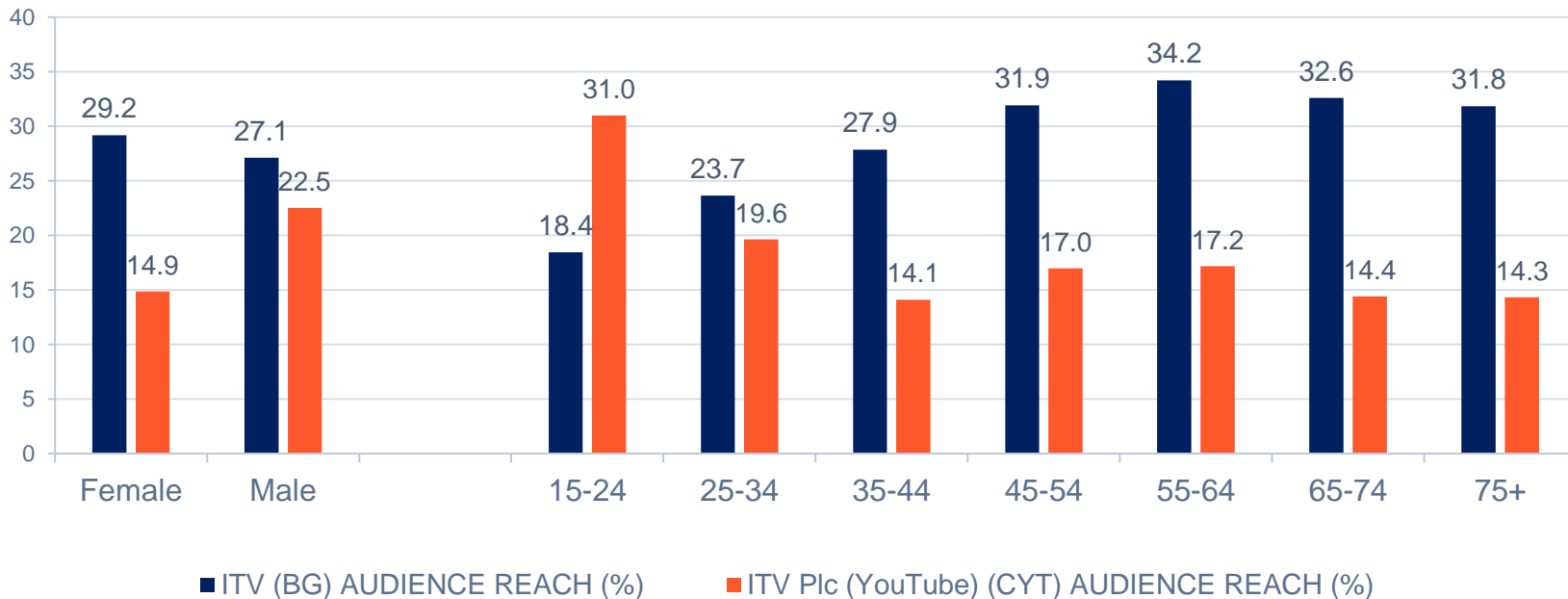
YouTube data – a first look



ITV owned content on YouTube had higher reach among 15-24s in March than ITV's online brand (websites/apps)



ITV Online Brand (BG) & ITV's Content on YouTube (CYT) - Audience reach (%)



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. ITV (BG) = ITV Brand Group – including ITV websites and ITV apps

Audience Profile – ITV YouTube content v ITV brand



ITV's content on YouTube attracted a younger audience than the ITV online website/app in March

| | | Audience Affinity Index | |
|-----------------|--------|-------------------------|--------------------|
| | | ITV on YouTube | ITV own sites/apps |
| Gender | Female | 80 | 104 |
| | Male | 121 | 96 |
| Age Group | 15-17 | 167 | 65 |
| | 18-24 | 166 | 65 |
| | 25-34 | 105 | 84 |
| | 35-44 | 76 | 99 |
| | 45-54 | 91 | 113 |
| | 55-64 | 92 | 121 |
| | 65-74 | 77 | 116 |
| | 75+ | 77 | 113 |
| Parent Guardian | No | 122 | 92 |
| | Yes | 81 | 107 |

| | | Audience Affinity Index | |
|-----------------|----------------------------|-------------------------|--------------------|
| | | ITV on YouTube | ITV own sites/apps |
| Fresco Segments | Budgeting Elderly | 83 | 113 |
| | Road to Retirement | 86 | 118 |
| | Asset Rich Greys | 84 | 113 |
| | Older Working Families | 85 | 109 |
| | High Income Professionals | 78 | 100 |
| | Secure Homeowners | 84 | 93 |
| | Families Juggling Finances | 91 | 90 |
| | Constrained Parents | 100 | 98 |
| | Rising Metropolitans | 110 | 88 |
| | Starting Out | 150 | 74 |
| | Young Dependents | 160 | 71 |
| | Mid-Life Pressed renters | 111 | 115 |



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24

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

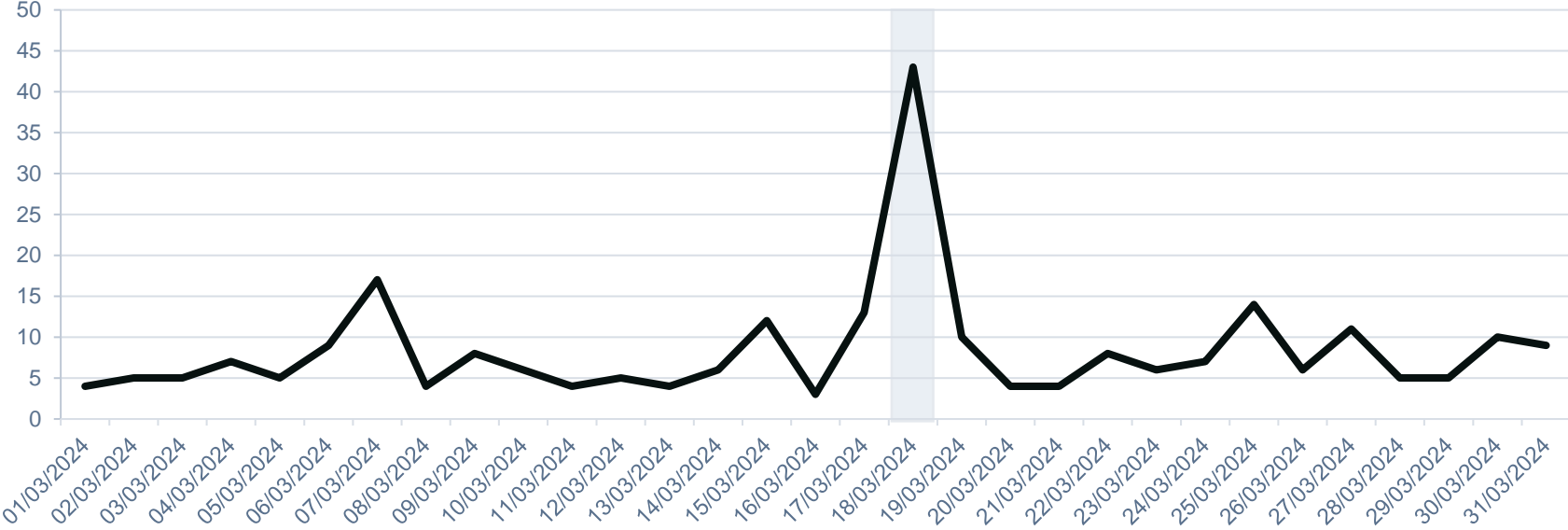
ITV on YouTube is ITV Plc content on YouTube (CYT). ITV owned sites/apps includes any websites and apps from the ITV brand (BG)

ITV's content on YouTube - minutes by day – Mar 24



The 18th March saw a huge uplift in time spent viewing ITV's content on YouTube– this was the day after the Manchester United v Liverpool FA Cup thriller which was shown on ITV

ITV PLC YouTube Content– Video Mins (Millions)



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2024

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



Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

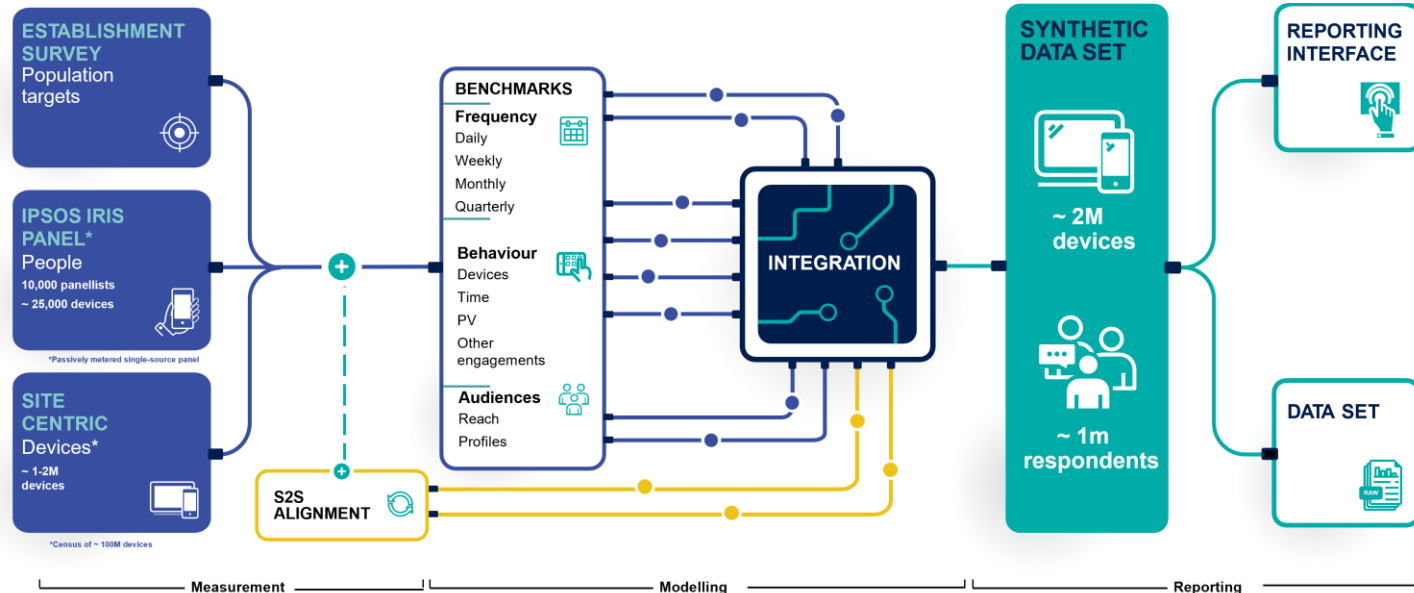
Methodology



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: 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>