

UKOM

Digital Market Overview

September 2021



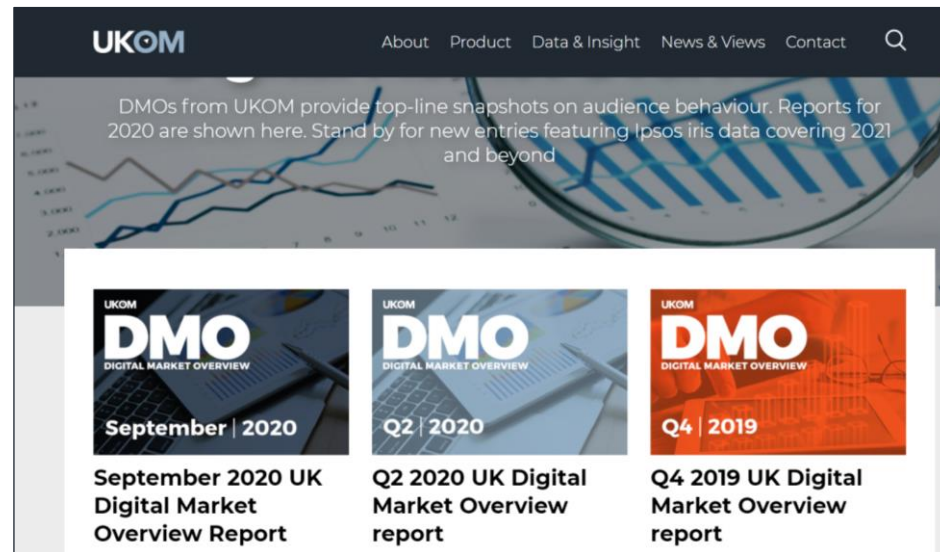
The UK Digital Market Overview Sep 2021



This Digital Market Overview focuses on UK audience usage in September 2021.

From January 2021, Ipsos iris replaced Comscore as the UKOM endorsed industry standard for the measurement of UK online audience behaviour.

Ipsos iris uses a different methodology from the previous supplier and so it is recommended that no comparisons nor trends are made between the two data sets.



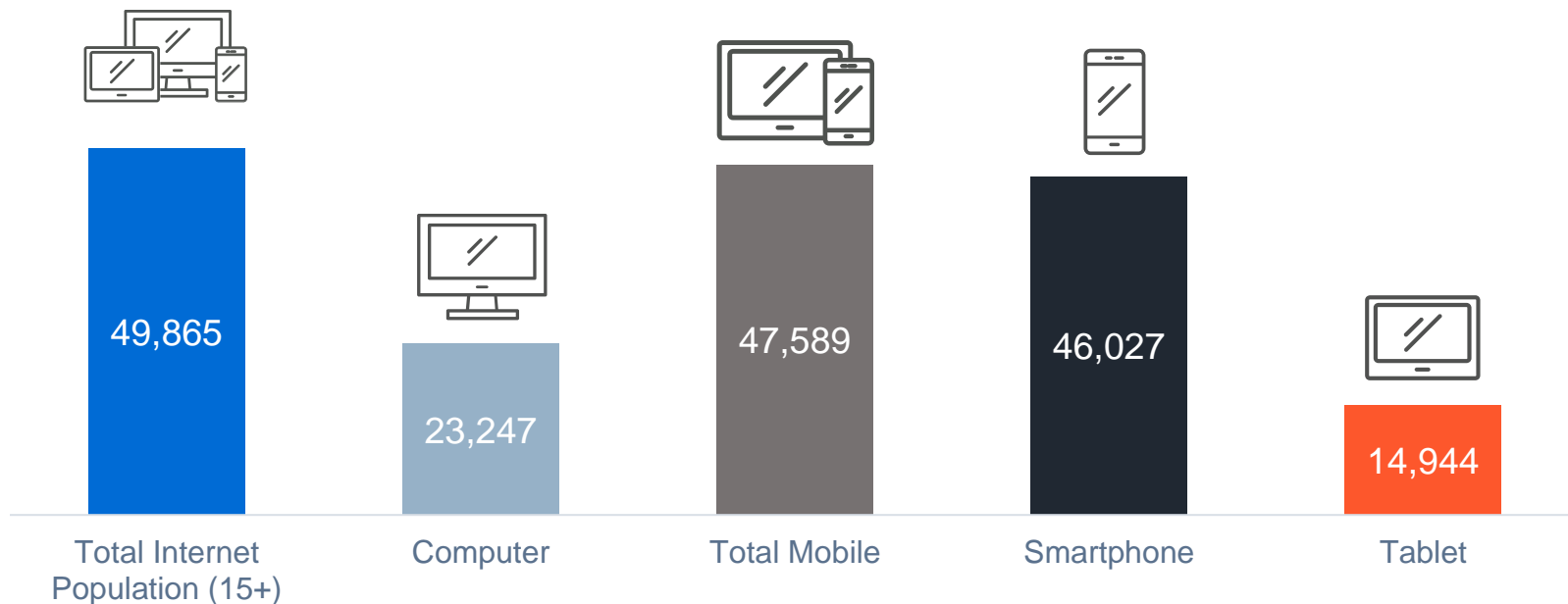


Audience by device



Online audience by device (000s)

More people use smartphones than computers

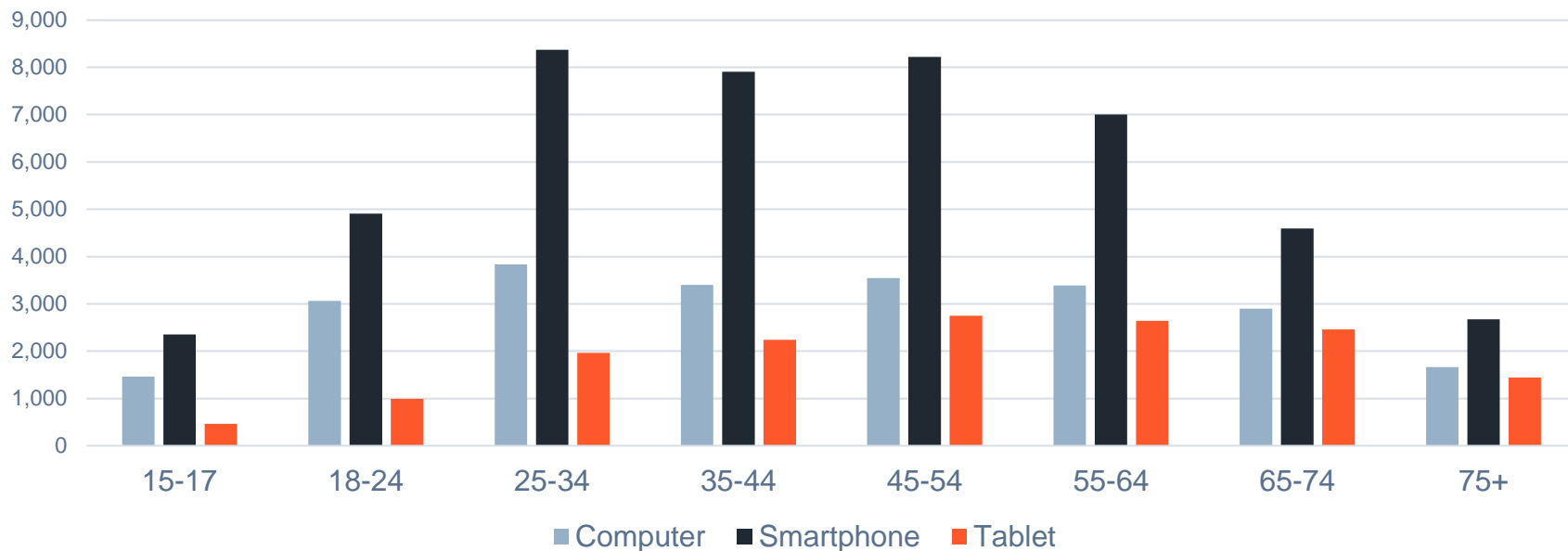


Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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

Device audience split by age (000s)

Smartphones are the dominant device across all age groups, particularly for those aged 25-64

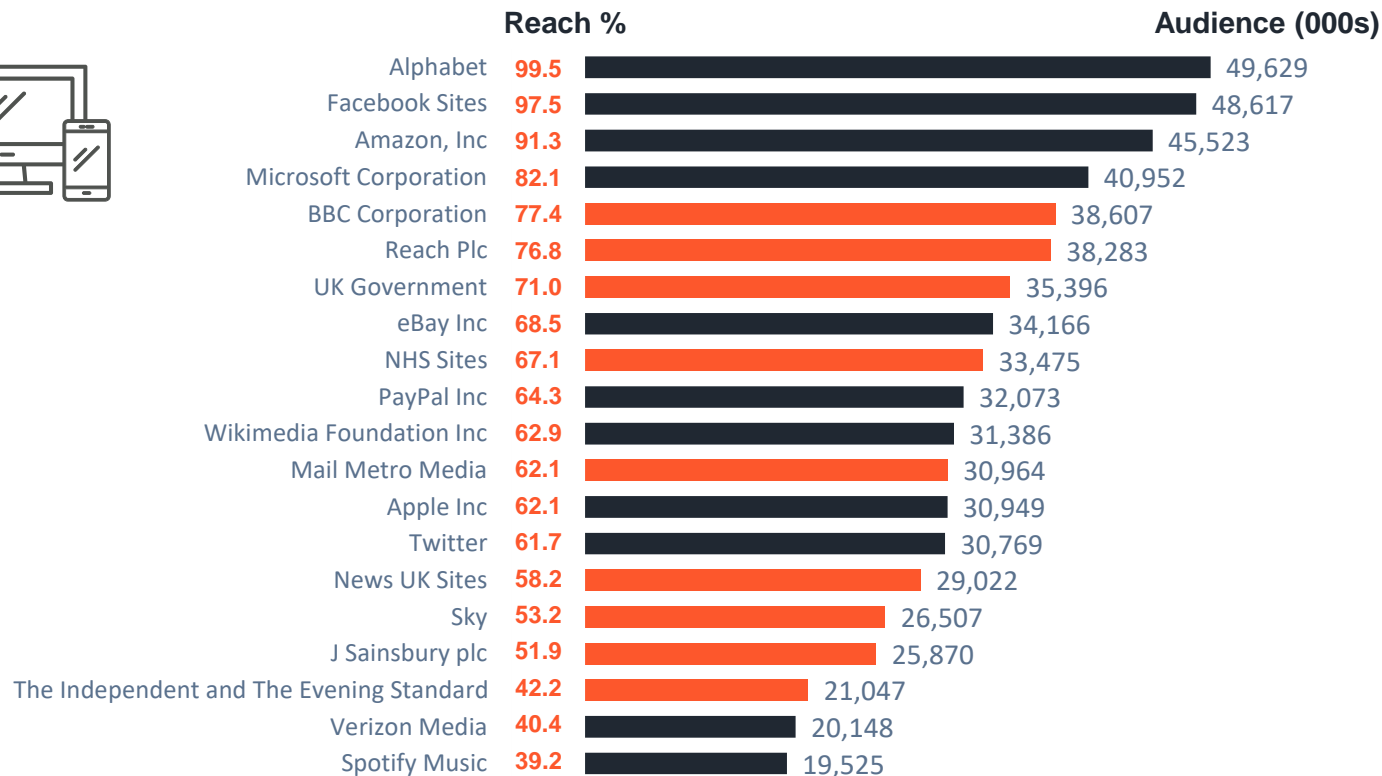


Top organisations and brands



Top 20 organisations by audience

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

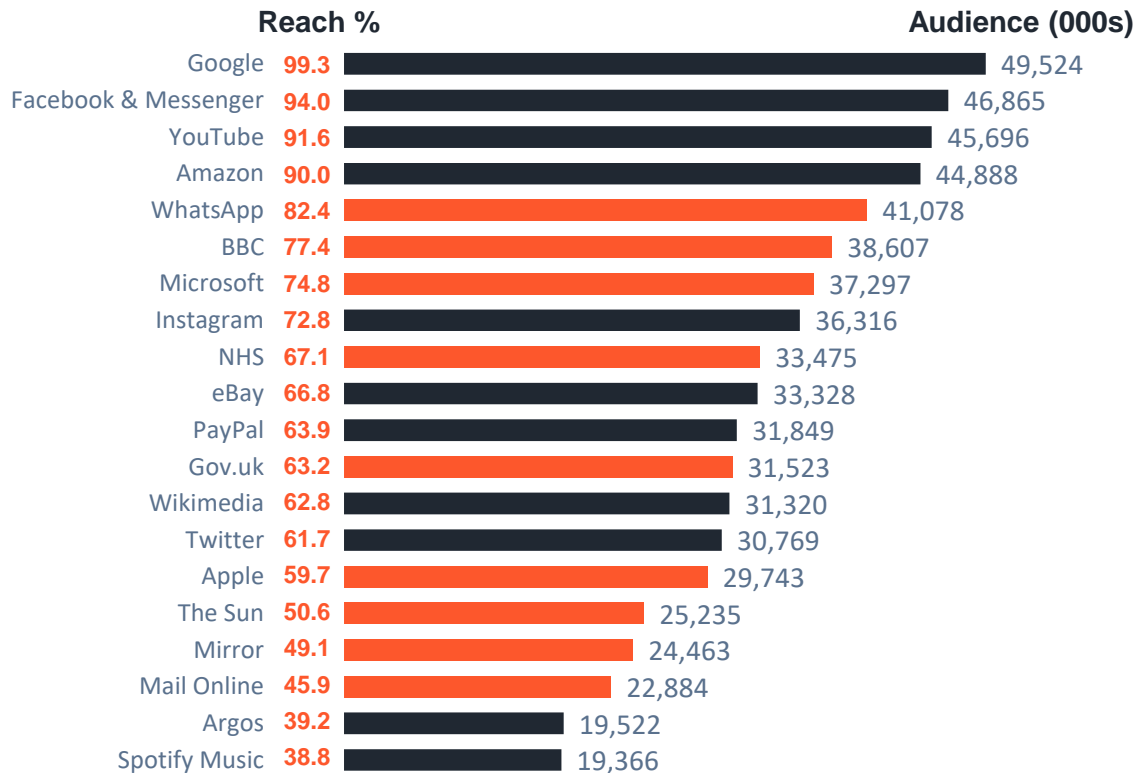


Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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

Top 20 online brands by audience

4 of the top 5 brands with the largest UK audiences are owned by Google or Facebook



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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

Top 10 organisations by audience & minutes

5 of the top 10 time orgs do not feature in the top 10 for audience



	Media	Audience (000s)	Audience Reach (%)
1	Alphabet	49,629	99.5
2	Facebook Sites	48,617	97.5
3	Amazon, Inc	45,523	91.3
4	Microsoft Corporation	40,952	82.1
5	BBC Corporation	38,607	77.4
6	Reach Plc	38,283	76.8
7	UK Government	35,396	71.0
8	eBay Inc	34,166	68.5
9	NHS Sites	33,475	67.1
10	PayPal Inc	32,073	64.3

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook Sites	62,619	1288:01
2	Alphabet	51,518	1038:03
3	Bytedance Inc.	11,746	765:02
4	Microsoft Corporation	10,112	246:55
5	Amazon, Inc	7,703	169:12
6	Snap Inc	7,404	621:47
7	BBC Corporation	7,131	184:43
8	Twitter	6,912	224:37
9	Apple Inc	5,281	170:38
10	Spotify Music	5,124	262:27



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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 brands by audience & minutes

Half of the top 10 brands for both audience & time are from Alphabet or Facebook (Meta)



	Media	Audience (000s)	Audience Reach (%)
1	Google	49,524	99.32
2	Facebook & Messenger	46,865	93.98
3	YouTube	45,696	91.64
4	Amazon	44,888	90.02
5	WhatsApp	41,078	82.38
6	BBC	38,607	77.42
7	Microsoft	37,297	74.8
8	Instagram	36,316	72.83
9	NHS	33,475	67.13
10	eBay	33,328	66.84

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	41,860	893:13
2	YouTube	26,558	581:11
3	Google	24,959	503:59
4	TikTok	11,746	765:02
5	WhatsApp	10,642	259:04
6	Instagram	10,108	278:19
7	Microsoft	8,800	235:56
8	Snapchat	7,402	628:03
9	BBC	7,131	184:43
10	Twitter	6,912	224:37



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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

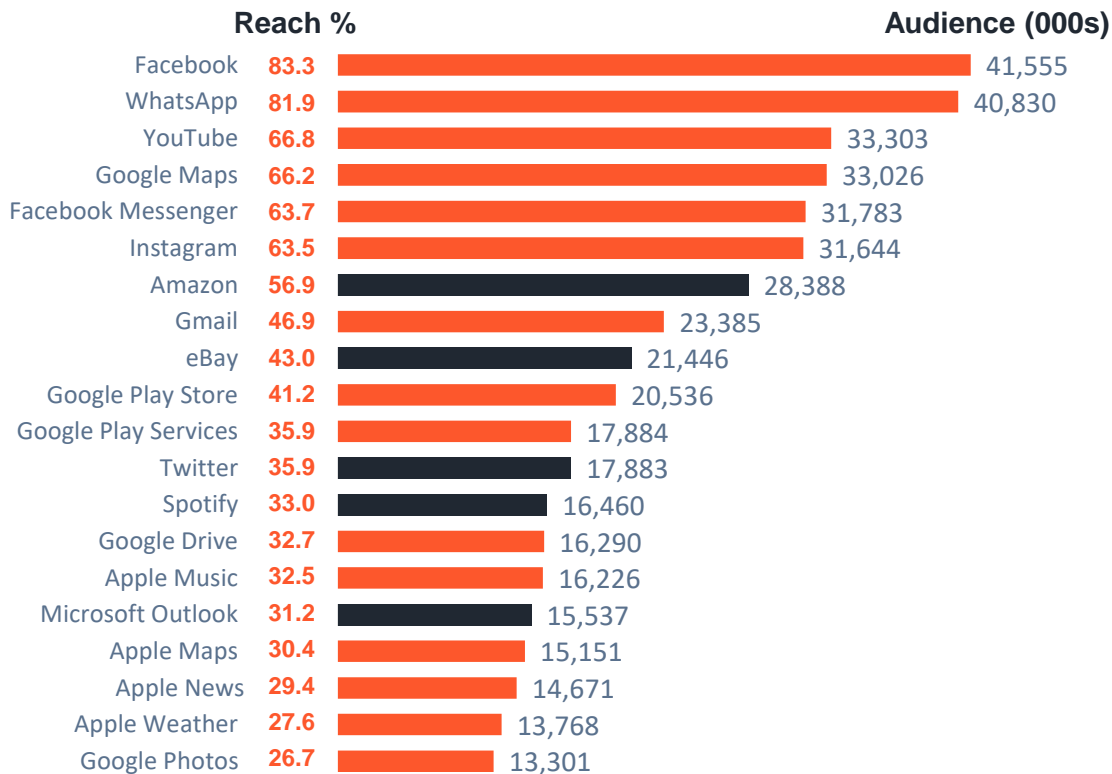
NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'

Top mobile apps



Top 20 mobile apps by audience

Google, Apple and Facebook apps dominate the Top 20 for audience reach



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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	Facebook	41,555	83.3
2	WhatsApp	40,830	81.9
3	YouTube	33,303	66.8
4	Google Maps	33,026	66.2
5	Facebook Messenger	31,783	63.7
6	Instagram	31,644	63.5
7	Amazon	28,388	56.9
8	Gmail	23,385	46.9
9	eBay	21,446	43.0
10	Google Play Store	20,536	41.2

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	32,463	781:13
2	YouTube	20,235	607:36
3	TikTok	11,709	1094:46
4	WhatsApp	10,603	259:41
5	Instagram	9,863	311:41
6	Snapchat	7,374	635:52
7	Twitter	5,939	332:06
8	Facebook Messenger	5,863	184:28
9	Spotify	5,096	309:37
10	Microsoft Outlook	4,445	286:05



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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

Netflix, BBC iPlayer, YouTube kids and Amazon Prime video are in the top 10 for tablet minutes



Smartphone Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	28,970	725:37
2	YouTube	15,790	506:10
3	TikTok	11,209	1079:22
4	WhatsApp	10,428	256:26
5	Instagram	9,483	318:19
6	Snapchat	7,311	637:23
7	Twitter	5,536	319:52
8	Facebook Messenger	5,258	170:42
9	Spotify	4,543	284:14
10	Google Maps	3,795	118:41



Tablet Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	YouTube	4,445	665:48
2	Facebook	3,493	340:03
3	Netflix	913	276:31
4	BBC iPlayer	777	305:59
5	YouTube Kids	728	1848:23
6	Microsoft Outlook	709	385:23
7	Facebook Messenger	605	119:10
8	Spotify	553	334:43
9	Gmail	518	146:39
10	Amazon Prime Video	500	293:48



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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'

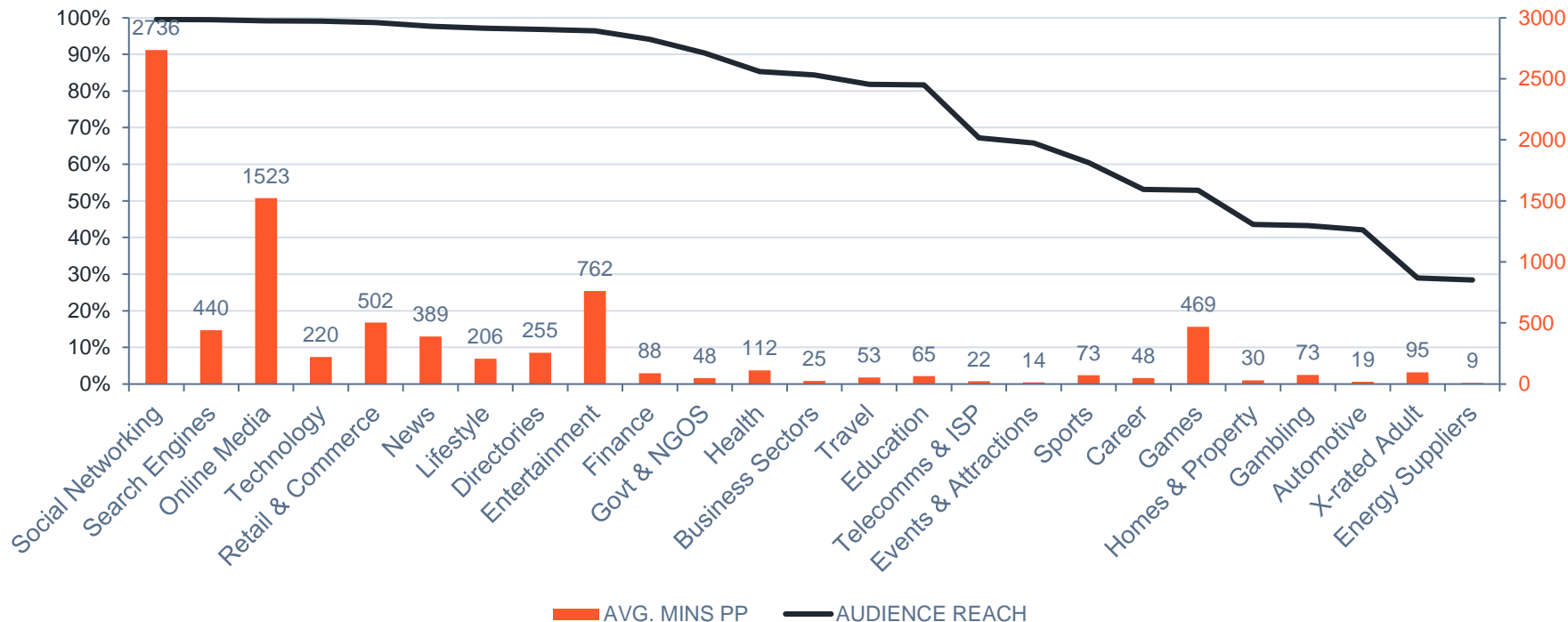
Category usage & growth



Reach & avg. mins pp by tier 1 category – Sep 21



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



AVG. MINS PP

AUDIENCE REACH



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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 daypart by tier 1 category

Utilities, business and finance by day. Adult content and news at night.



Top 3 tier 1 category by daypart share	Night Time & Breakfast (00:00-08:59)	Morning and Afternoon (09:00-17:29)	Early Peak (17:30-19:59)	Late Peak & Late Night (20:00-23:59)
Total Internet Population (15+)	22.3	39.1	15.5	23.1
X-rated Adult	32.2	35.4	10.2	22.3
News	24.2	41.7	14.3	19.8
Health	23.0	41.9	15.1	20.1
Business Sectors	13.5	57.6	14.0	14.8
Energy Suppliers / Utilities	12.7	55.3	17.9	14.1
Finance	17.7	52.2	14.2	15.9
Events & Attractions	11.7	43.1	19.3	25.8
Automotive	11.7	45.4	17.7	25.2
Sports	12.5	44.8	18.4	24.3
Games	18.9	39.5	16.9	24.8



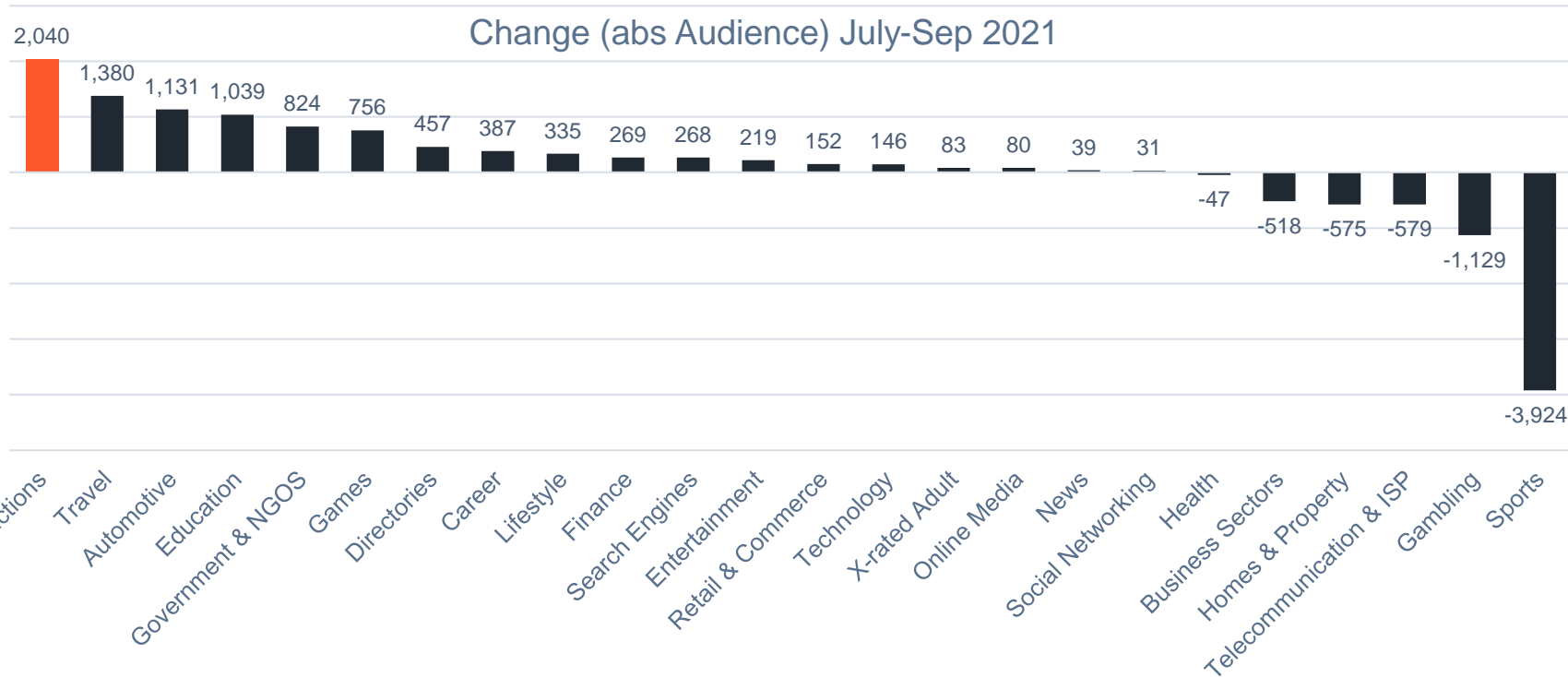
Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

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'

Audience change (000s) by tier 1 category: July-Sep 21

Travel & events/attractions add most visitors whilst sport loses out after the Euros peak in July



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, July – September 2021

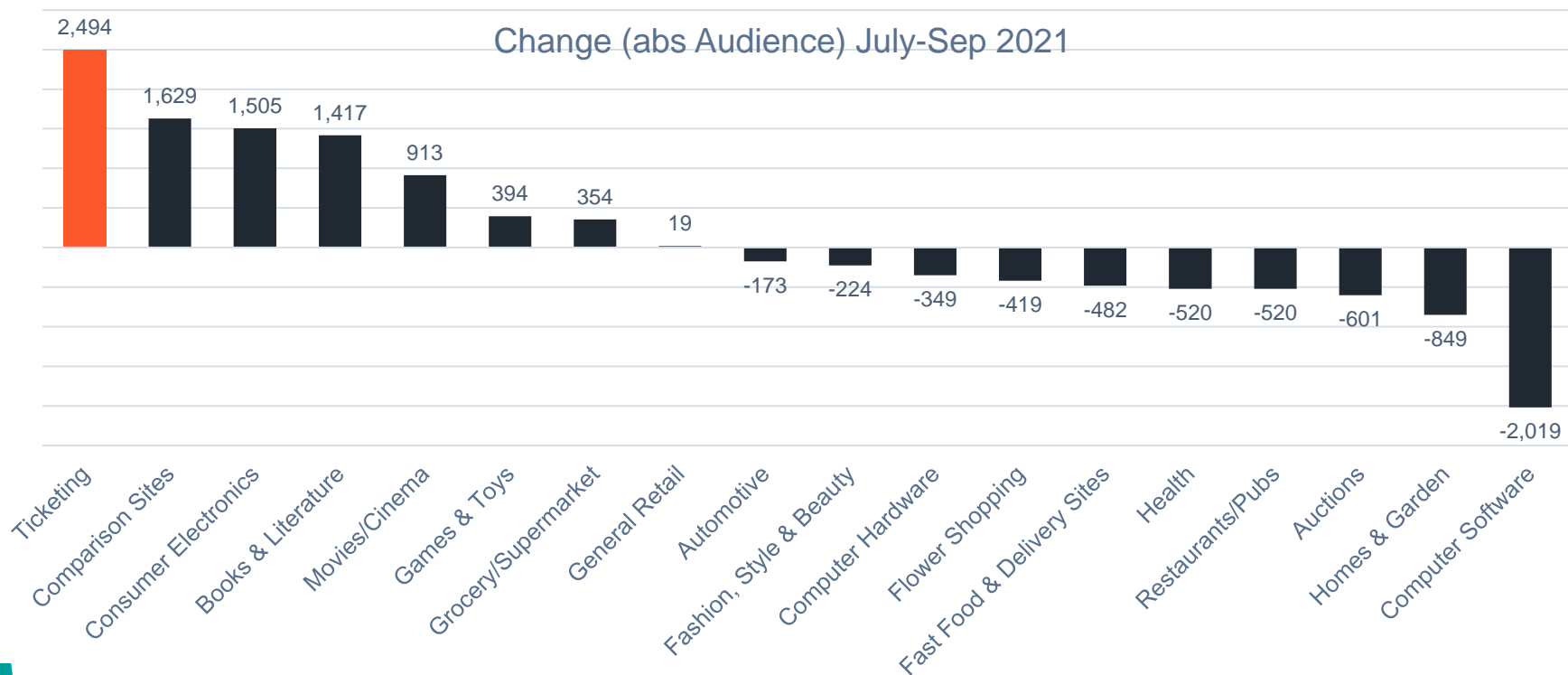
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



Audience change (000s): retail categories July-Sep 21



Ticketing sites received a boost as live events continue to return



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, July – September 2021

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

Top growth categories

1. Retail: Ticketing
2. Events & Attractions

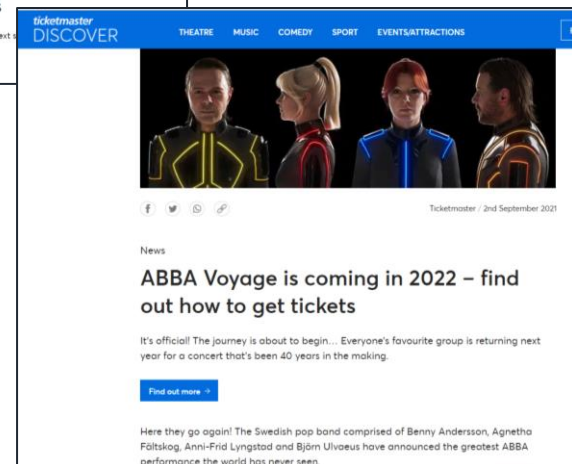
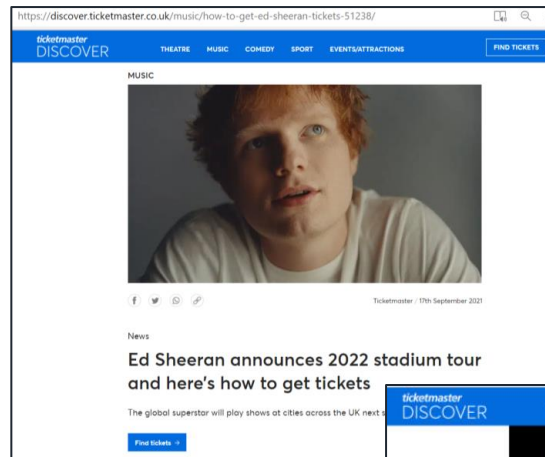


Ticketing retail : Jul-Sep 2021

Confidence is returning as people are booking tickets to live events



	AUDIENCE (000s)			
	JUL '21	SEP '21	Change (%)	Change (abs)
Ticketing	19,333	21,827	12.9 %↑	2,494
Ticketmaster	3,582	6,252	74.6 %↑	2,670
Viagogo	1,140	2,580	126.3 %↑	1,440
Seetickets	2,618	3,290	25.6 %↑	671
Ents24	889	1,450	63.0 %↑	560



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, July – September 2021

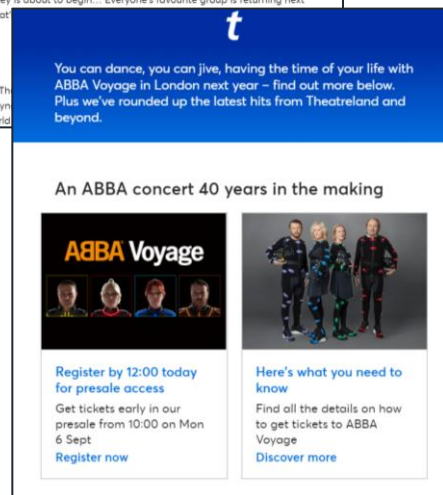
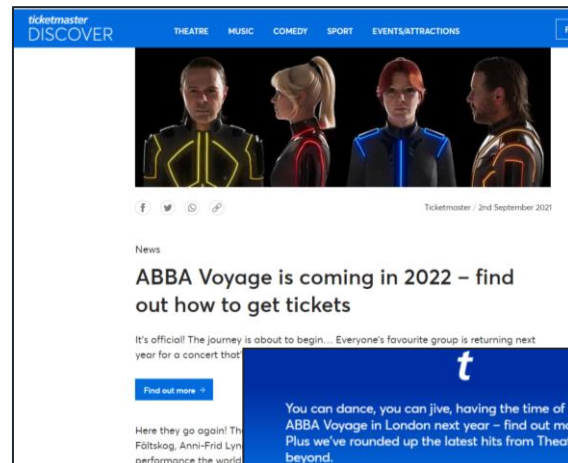
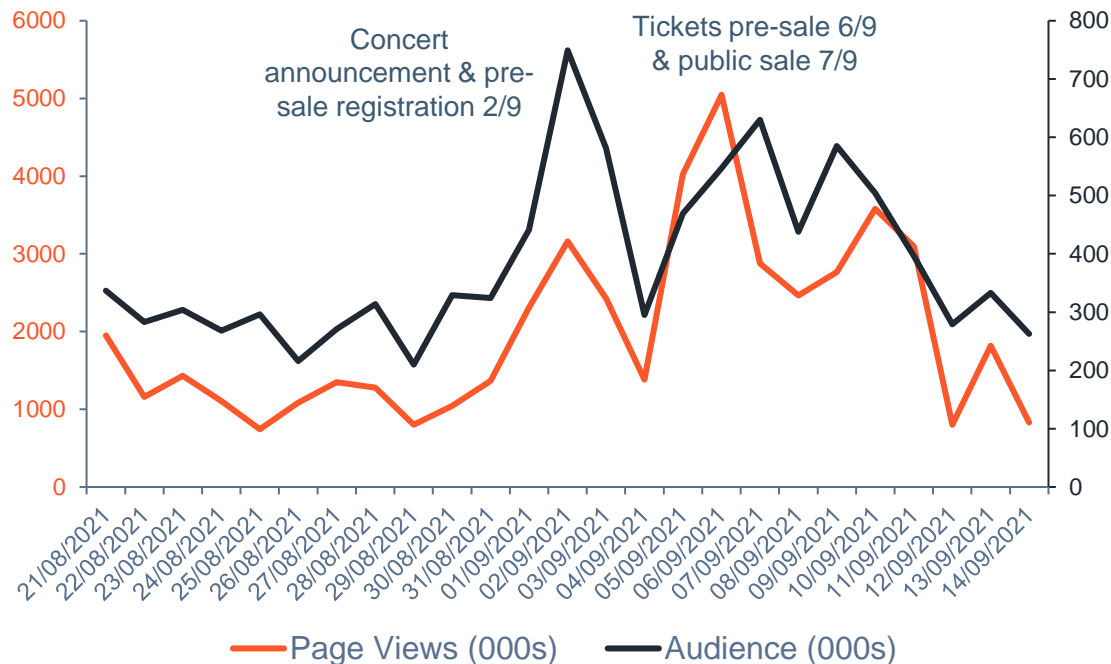
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New concerts are enticing audiences to book tickets



'Abba Voyage' pre-sale registration resulted in huge uplifts on Ticketmaster website

Ticketmaster.co.uk

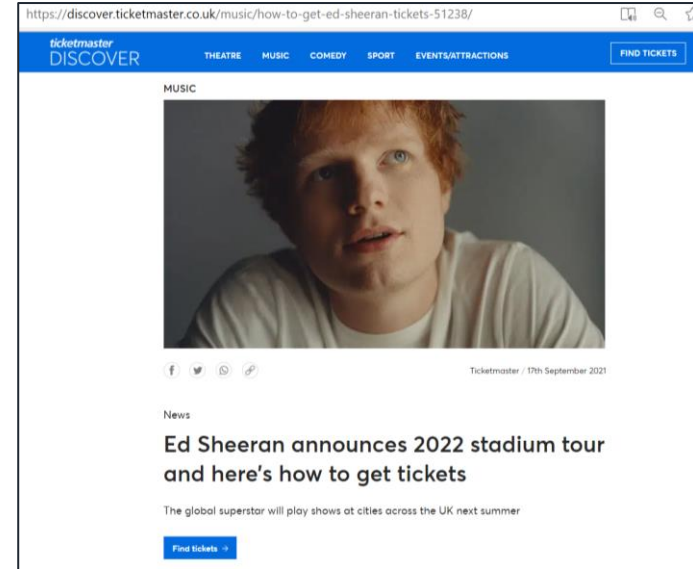
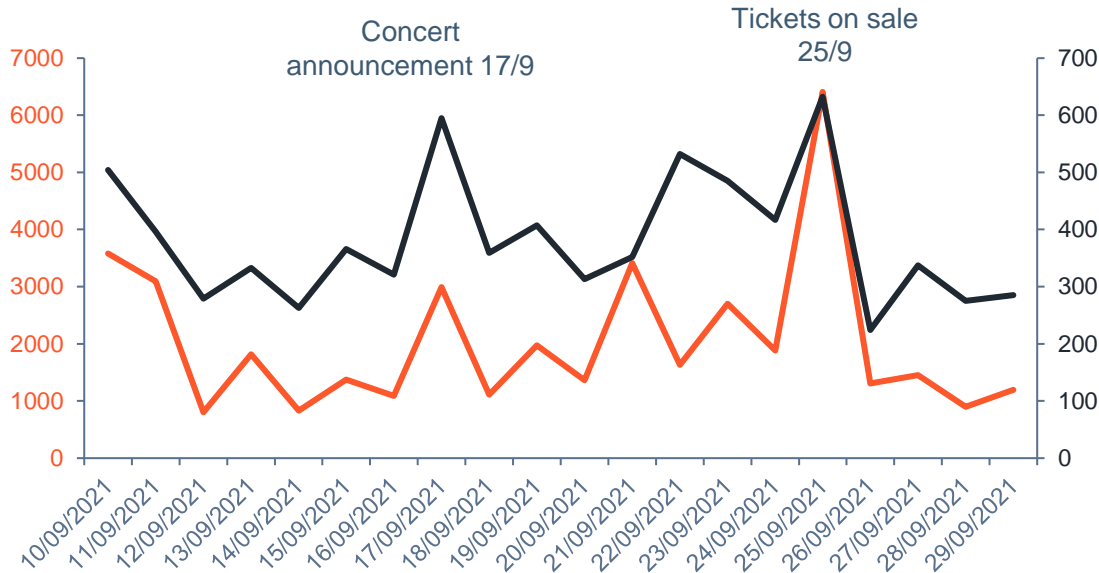


New concerts are enticing audiences to book tickets



Ed Sheeran tour announcement and ticket sale drove audiences to Ticketmaster

Ticketmaster.co.uk



— Page Views(000s) — Audience(000s)



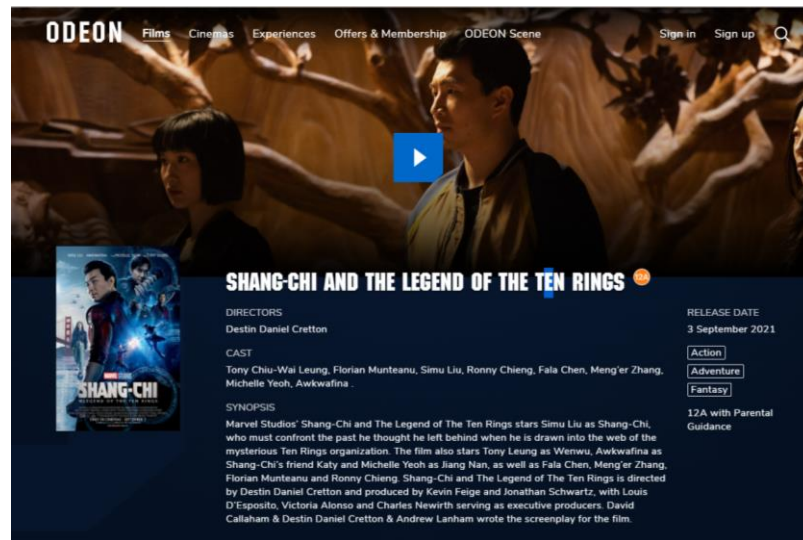
Source: © Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021, 15+

Attractions/Events: Jul-Sep 2021

Confidence is returning as people are booking tickets to 'in person' events & attractions



	AUDIENCE (000s)			
	JUL '21	SEP '21	Change (%)	Change (abs)
Events & Attractions	30,786	32,826	6.6 %↑	2,040
General Events & Attractions	7,988	13,495	68.9 %↑	5,507
Performing Arts	2,142	3,766	75.8 %↑	1,624
Music Events	2,620	3,874	47.8 %↑	1,253
Movies/Cinema	16,903	17,458	3.3 %↑	554
Top 3 cinema orgs	6,116	7,242	18.4 %↑	1,126
Cineworld Plc	2,361	3,330	41.0 %↑	969
Odeon Cinemas Group	2,075	2,799	34.9 %↑	724



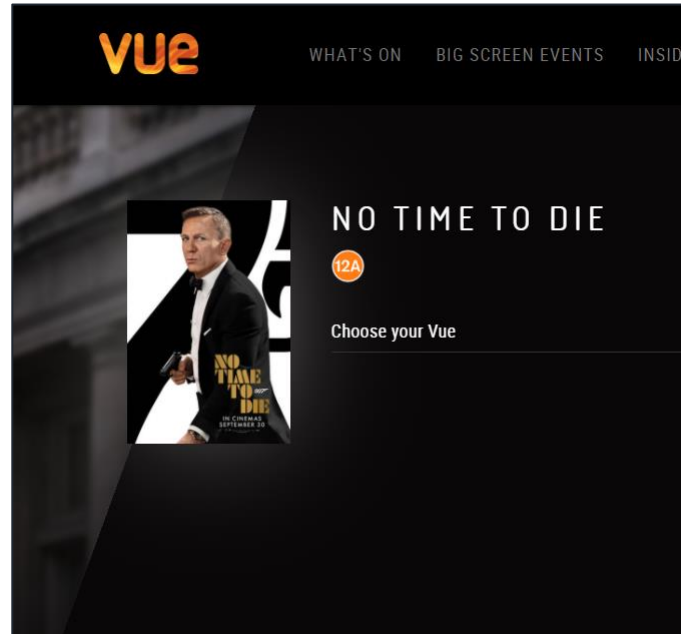
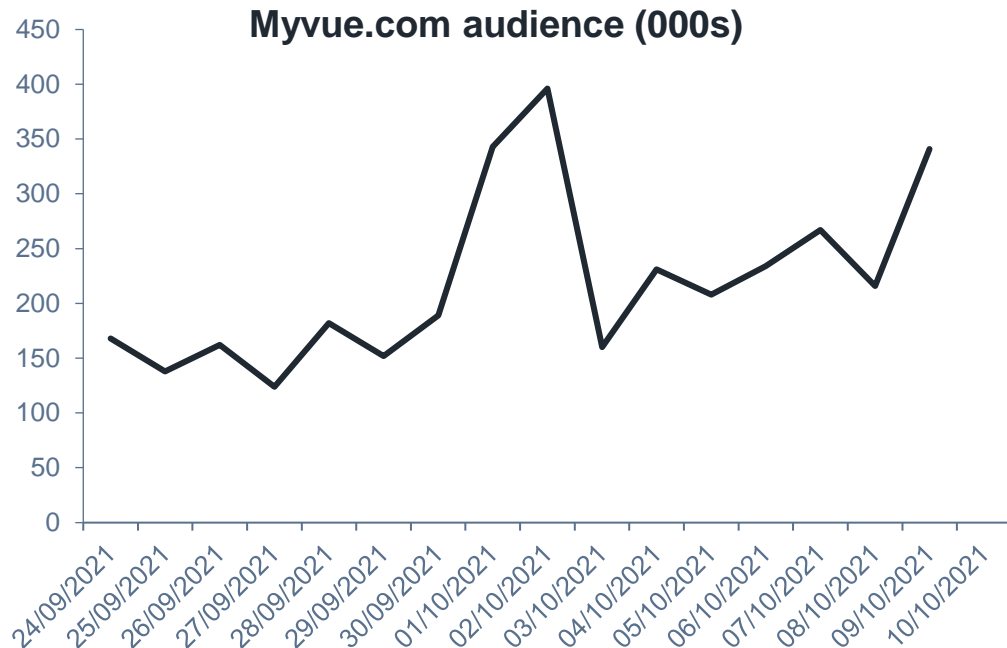
Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, July – Sept 2021

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

Bond is driving audiences to the cinema in October



Myvue.com audience peaks on film release date (2nd Oct) and following weekend



Topical insights



Usage of airline brands among 'environmentalists'



Despite good intentions, lifestyle compromises haven't been that easy when it comes to flying

Target Audience = 'I'm prepared to make lifestyle compromises to benefit the environment': definitely agree

MEDIA	AUDIENCE (000s)	AUDIENCE REACH (%)	AUDIENCE AFFINITY INDEX (v Internet Pop)
TARGET	9,536	100	100
TOTAL SELECTION* – All airline brands	2,104	22.07	98
British Airways	907	9.52	109
EasyJet	618	6.48	84
Ryanair	571	5.99	99
Jet2	519	5.44	85
Virgin Atlantic	160	1.67	107
Wizz Air	134	1.41	135
Aer Lingus	76	0.8	172
KLM	53	0.55	85
Qatar Airways	51	0.54	146
Qantas Airways	50	0.53	141

2.1m (22%) visited airline brands in September

Over 900K visited BA

They are more likely than average to visit brands which offer long haul flights e.g. BA, Virgin Atlantic, Qatar airways and Qantas



Source: Ipsos MORI, Ipsos iris Online Audience Measurement Service, September 2021

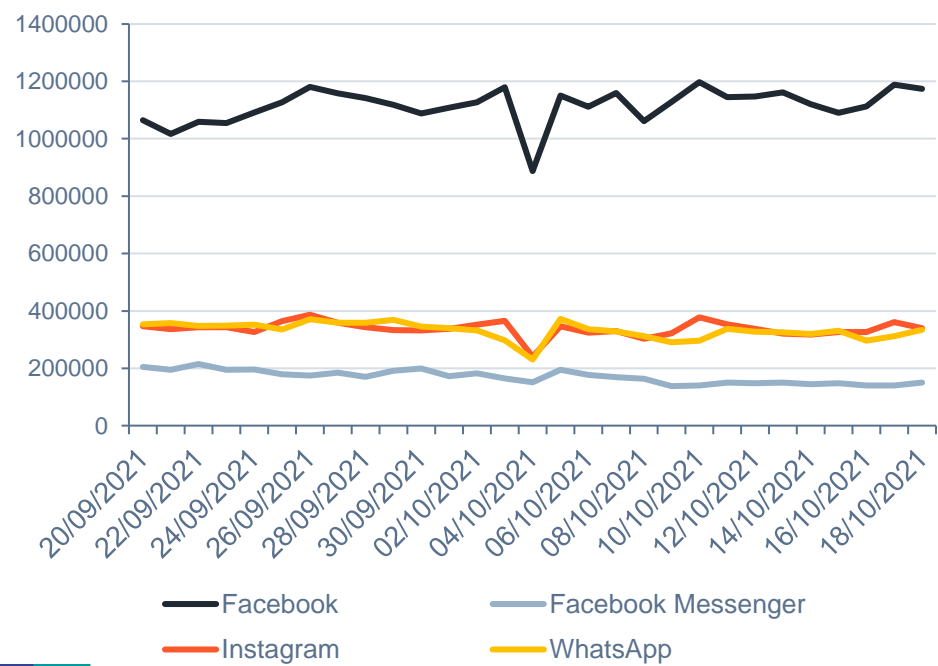
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Total Selection = All airline brands excluding airports



Mobile app time on day of Facebook outage – 4/10/21

Twitter, Google Messages, Netflix and Yahoo mail were all beneficiaries of minutes



Minutes on Facebook apps (000s)



MEDIA	TOTAL MINS (000s)		
Facebook	887,690	-25% ↓	-23% ↓
WhatsApp	230,117	-23% ↓	-36% ↓
Instagram	240,876	-34% ↓	-33% ↓
Facebook Messenger	150,922	-8% ↓	-18% ↓
Twitter	190,589	22% ↑	4% ↑
Google Messages	29,802	132% ↑	76% ↑
Netflix	127,127	15% ↑	89% ↑
Yahoo Mail	41,209	60% ↑	10% ↑





Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

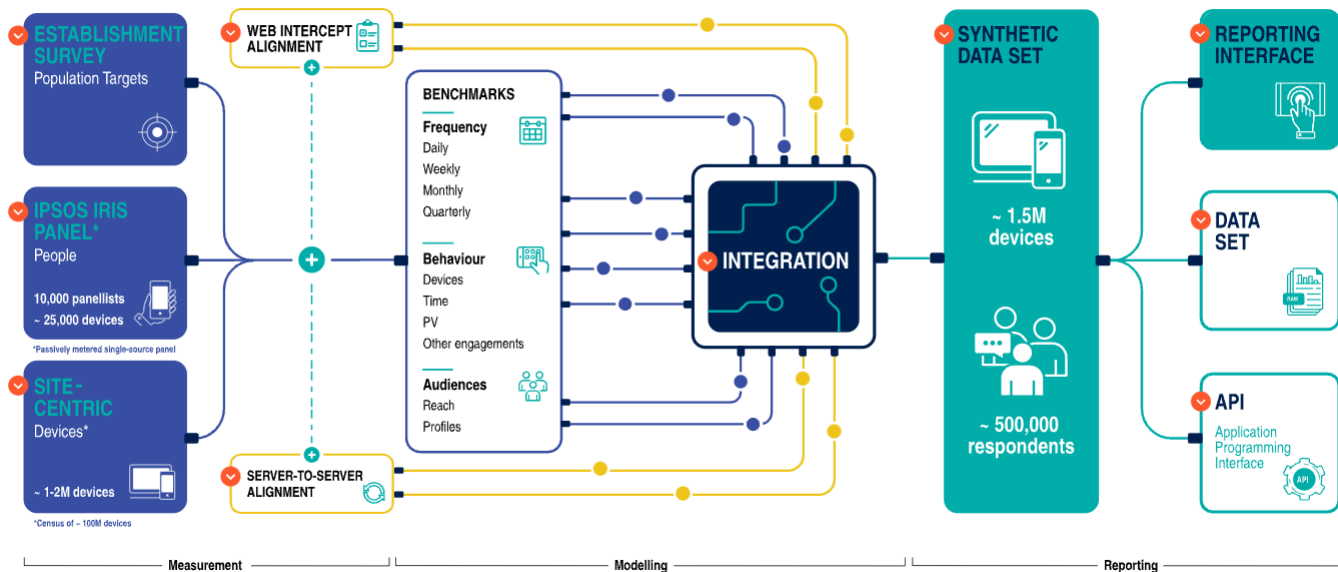
Methodology



A hybrid measurement solution combining a single-source panel with site-centric measurement

Ipsos iris is the new UKOM-endorsed service for the measurement of audiences of online content. It uses a hybrid methodology combining metered data from a core 10,000 single-source panel with census site-centric measurement. The diagram below summarises the inputs and processes involved in the production of Ipsos iris audience data.

More detail on the methodology can be found at: <https://ukom.uk.net/ipsos-iris-overview.php>



About UKOM



UKOM's objective is to set and oversee the delivery of a credible industry standard for digital audience measurement. That means quantifying audiences in terms of people, not browsers or machines.

UKOM's governance structure involves all sides of the industry, to ensure that Ipsos iris services meet our collective needs fully and fairly.

The whole UK media industry is involved in setting and overseeing UKOM standards through its Technical and Commercial Committees, and the UKOM Board.

UKOM and Ipsos work to an agreed process for product approval, from agreeing concepts, to approved data publication, and continuous assessment.

Find out more at:

www.ukom.uk.net/

About Ipsos



Ipsos measure audiences of media content in more than 70 countries, and the company is at the forefront of the latest techniques and methodologies required to measure more platforms, more quickly.

In the UK, Ipsos have developed the world's first large scale, single source, multi-platform, passive measurement panel and work across the industry with partners such as: BARB, RAJAR, PAMCo, IPA Touchpoints, and Route.

In 2021, Ipsos iris, became UKOM's approved solution for online audience measurement data. The solution is built for the needs of the industry and allows clients to: reassert their value proposition, have greater differentiation, enable ROI for clients, and give you a trusted independent foundation to make evidence-based decisions for their digital growth.

Find out more at:

<https://iris.ipsos.com/what-we-offer/>