

UKOM

Digital Market Overview

April 2022



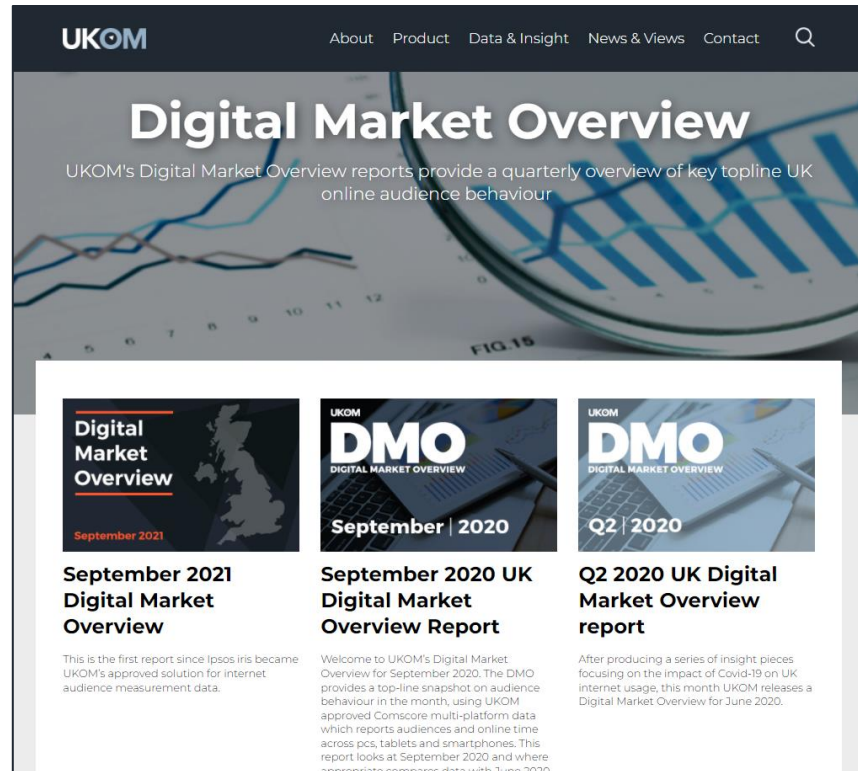
The UK Digital Market Overview April 2022



This Digital Market Overview focuses on UK audience usage in April 2022.

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

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



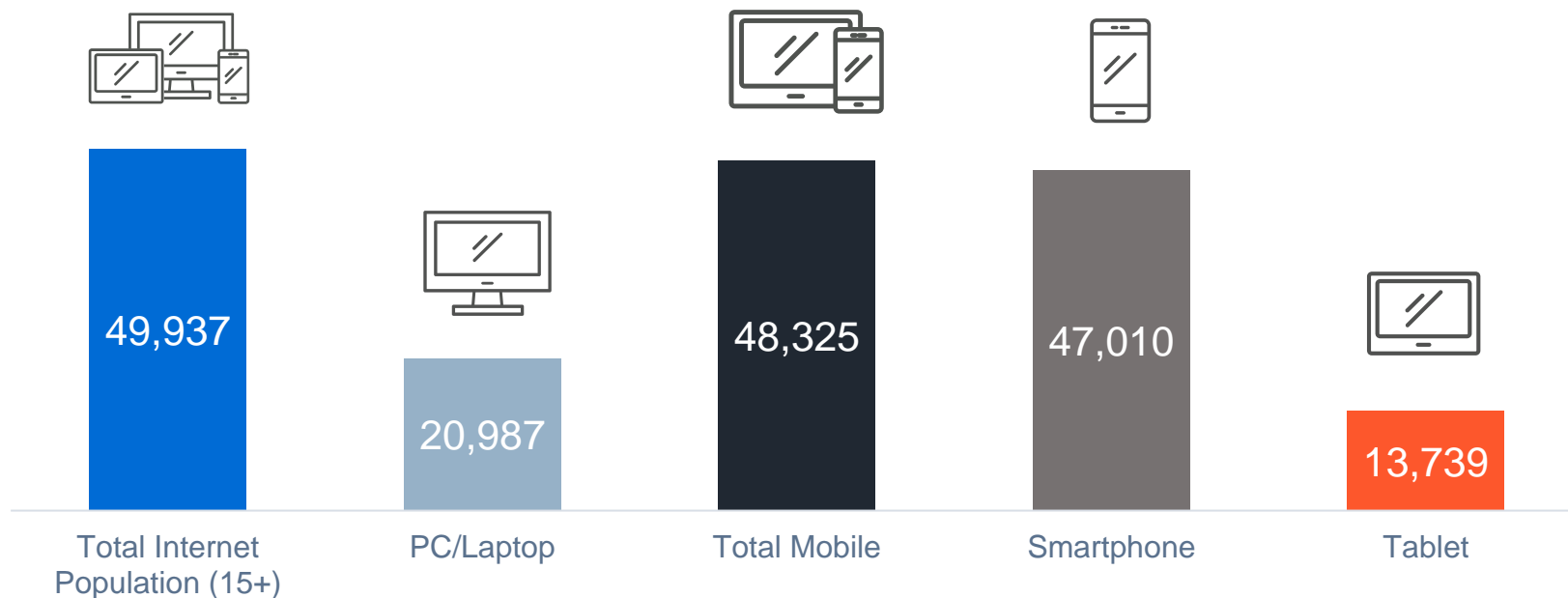


Audience by device



Online audience by device (000s)

More than twice as many people use smartphones than PCs/laptops

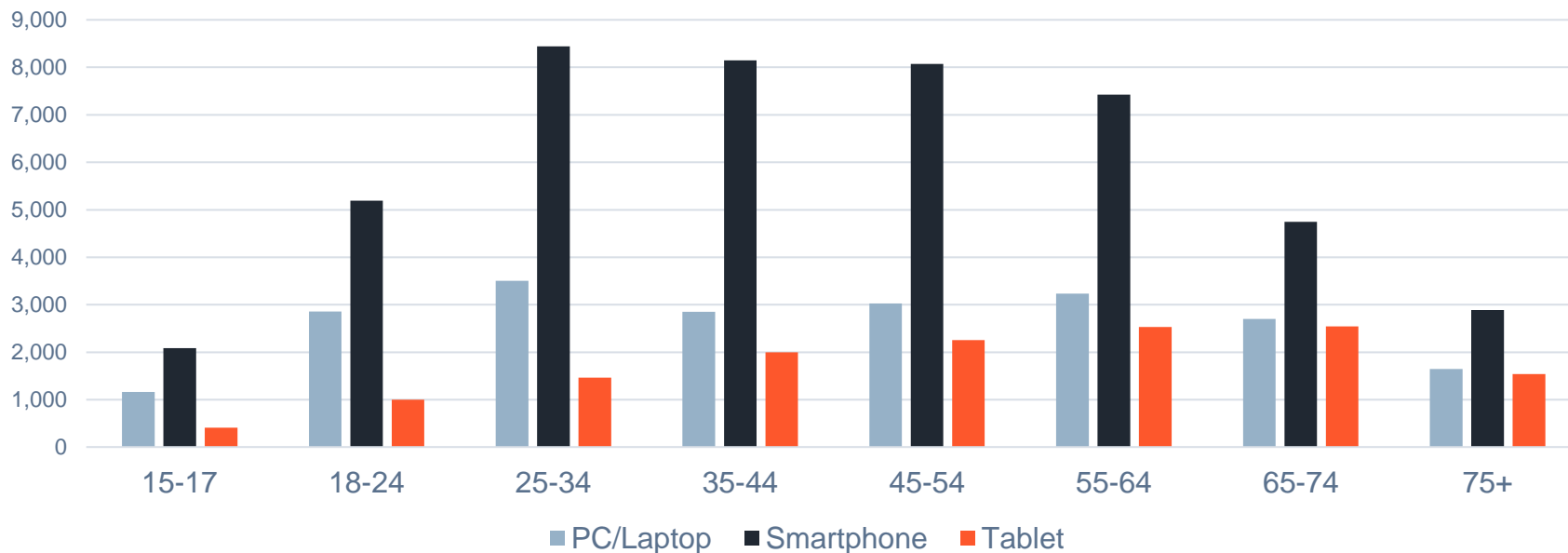


Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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

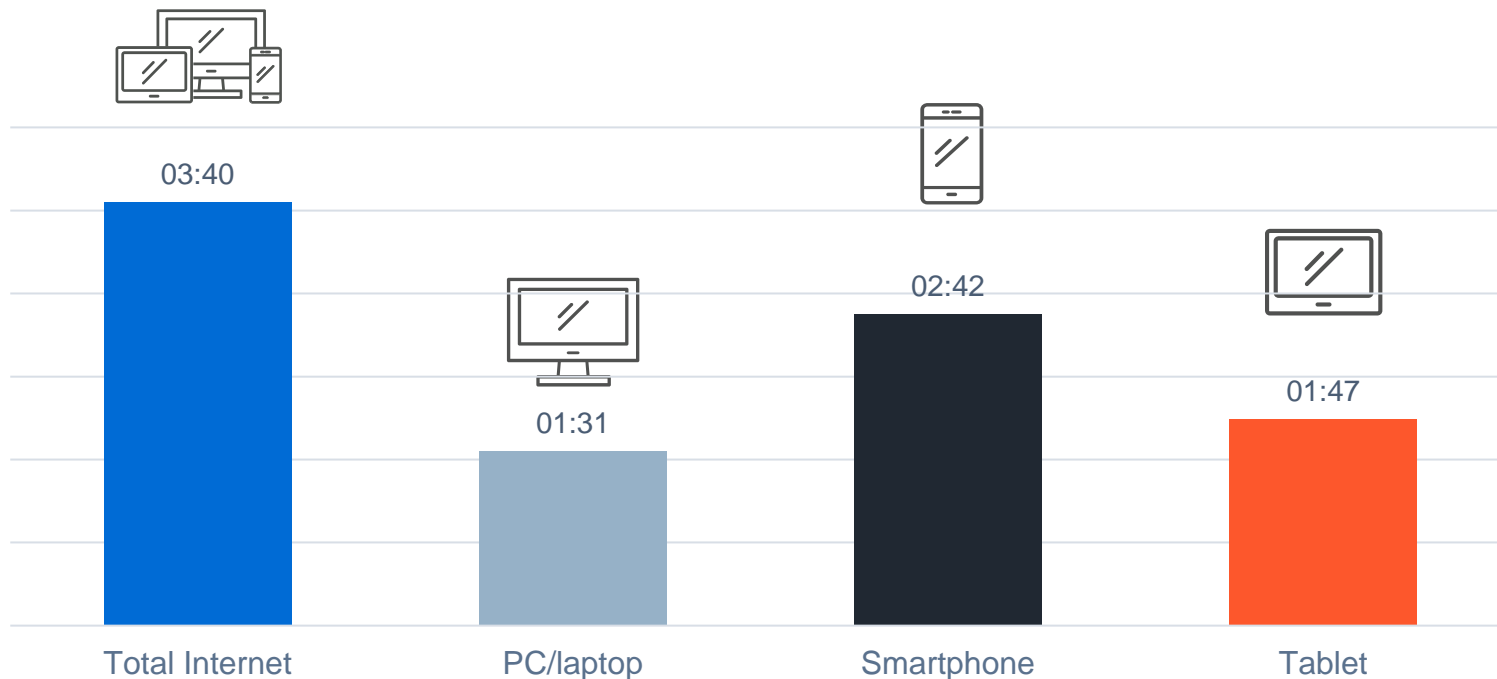


Time online



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

Average time spent is higher on tablet devices than computers among those who use them

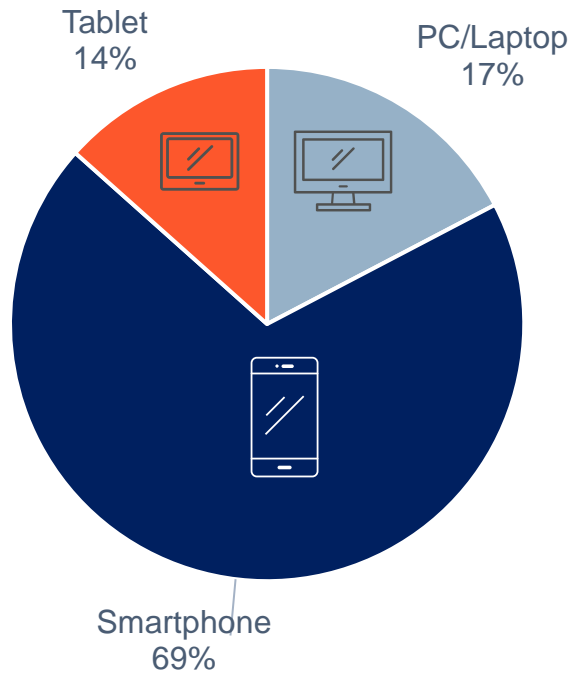
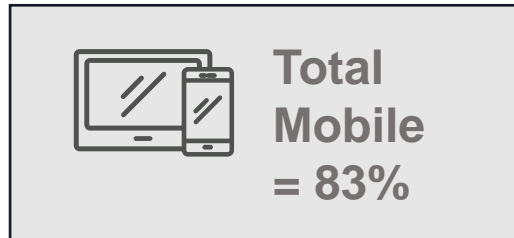


Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Averages are based on users of each device. Average time online was calculated manually by dividing Monthly minutes per person by 30 days

Share of minutes by device

Smartphones account for 69% of time online

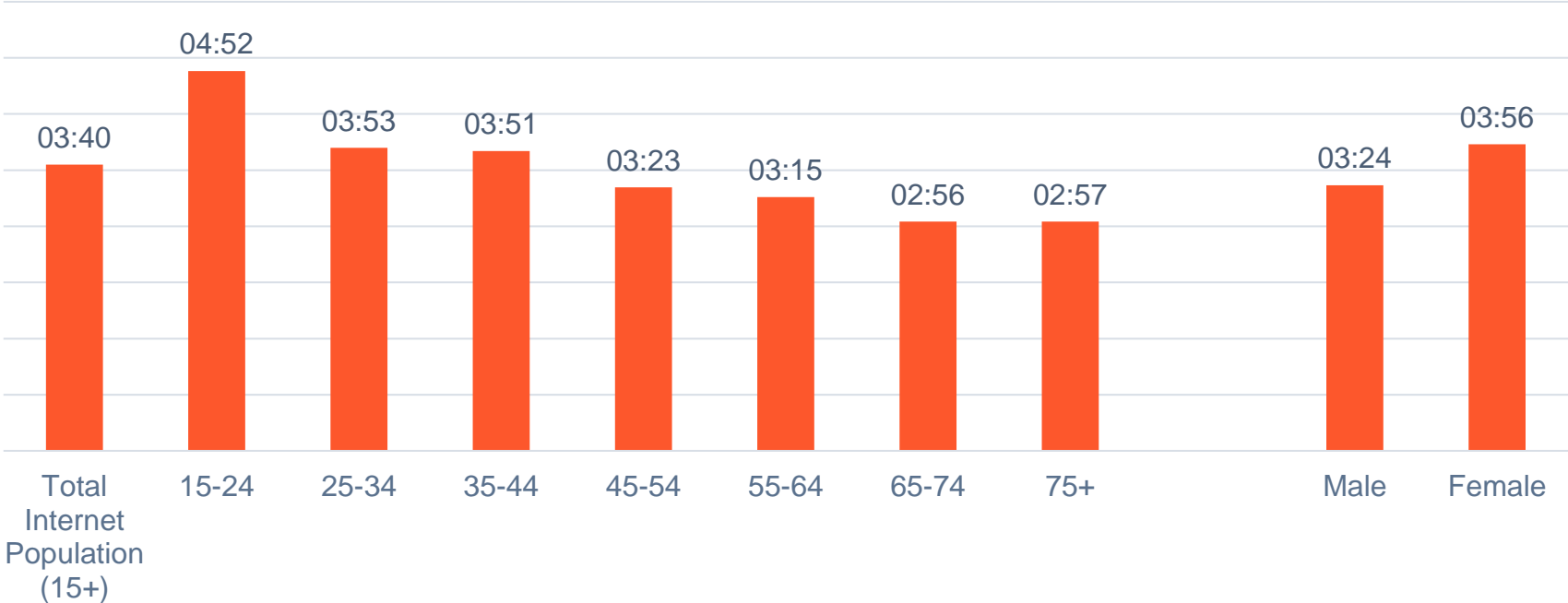


Average time online per day by age & gender (hh:mm)



Younger audiences and females spend more time online

Total Internet



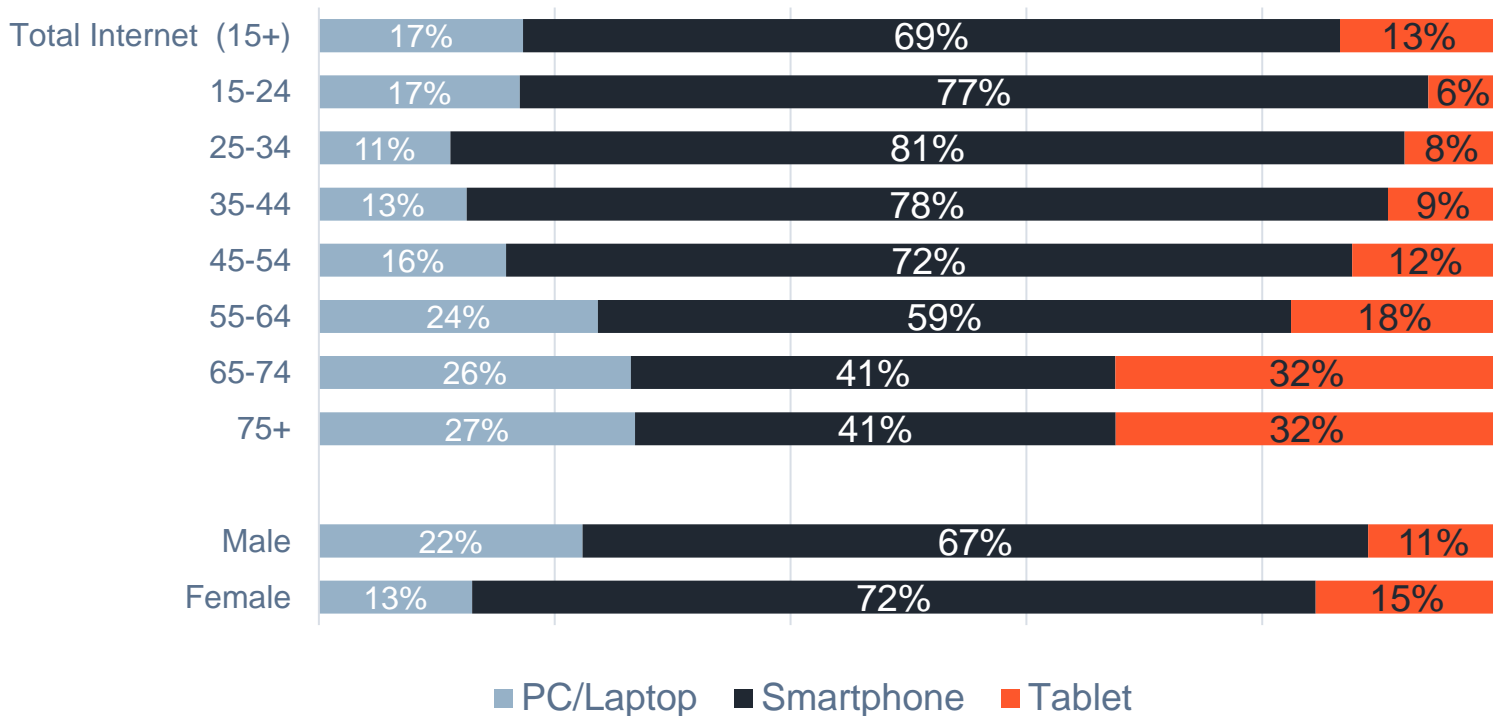
Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. NB: Average time online was calculated manually by dividing Monthly minutes per person by 30 days.

Platform share of minutes by age and gender



Older audiences spend a greater share of time on tablet devices



Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

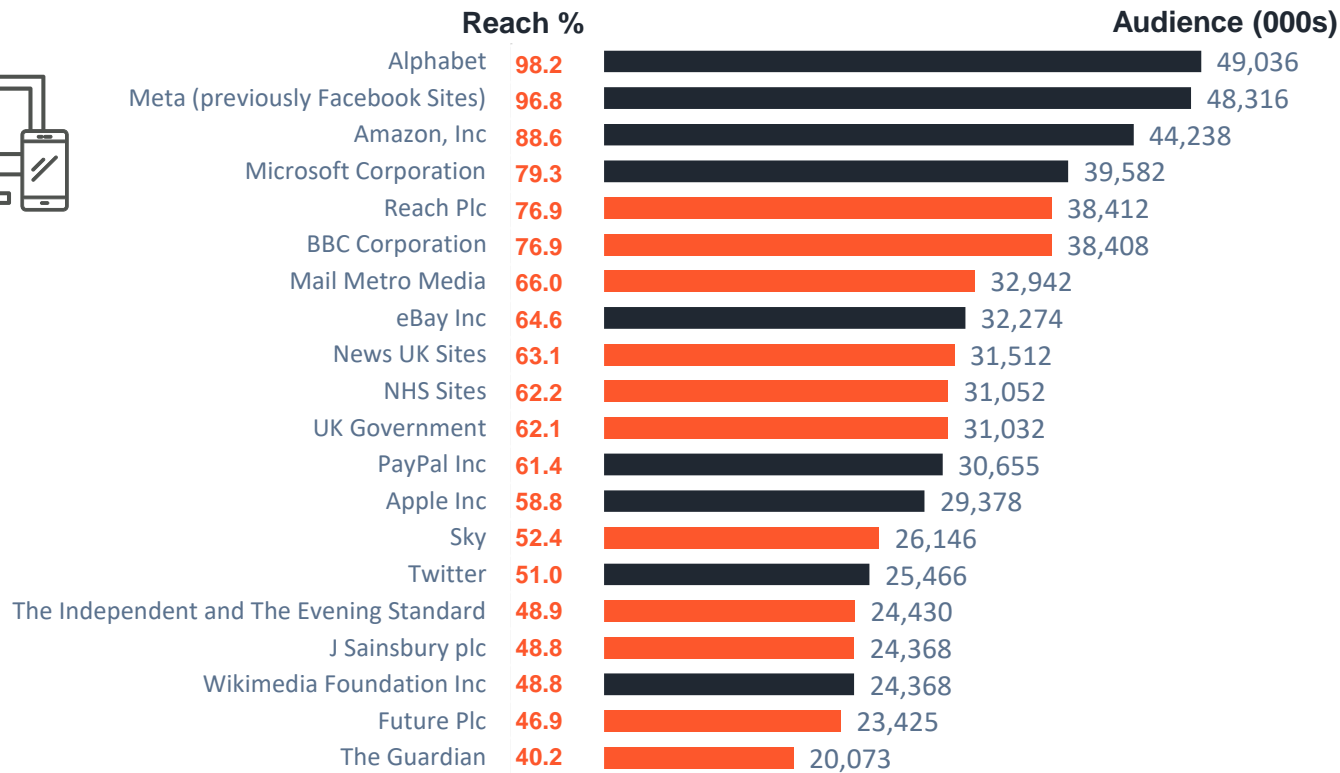
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Top organisations and brands



Top 20 organisations by audience

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

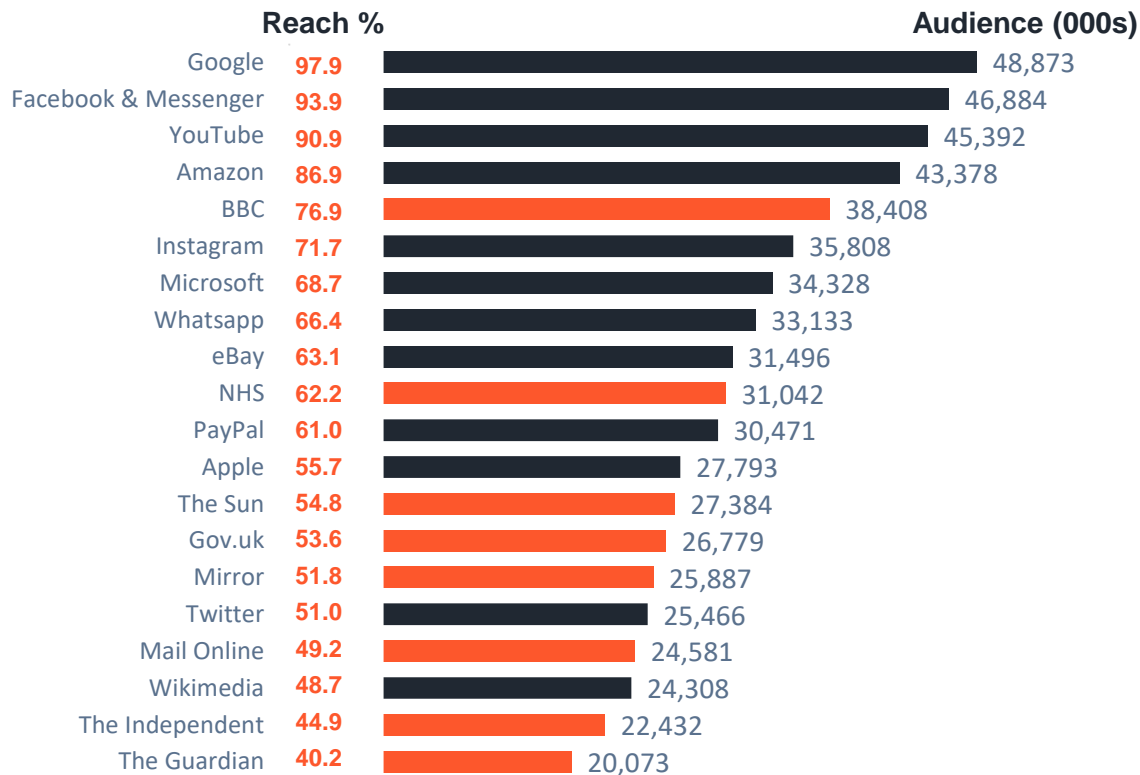


Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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

Top 20 online brands by audience

The BBC and NHS are the only two British brands in the top 10



Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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Category usage & growth

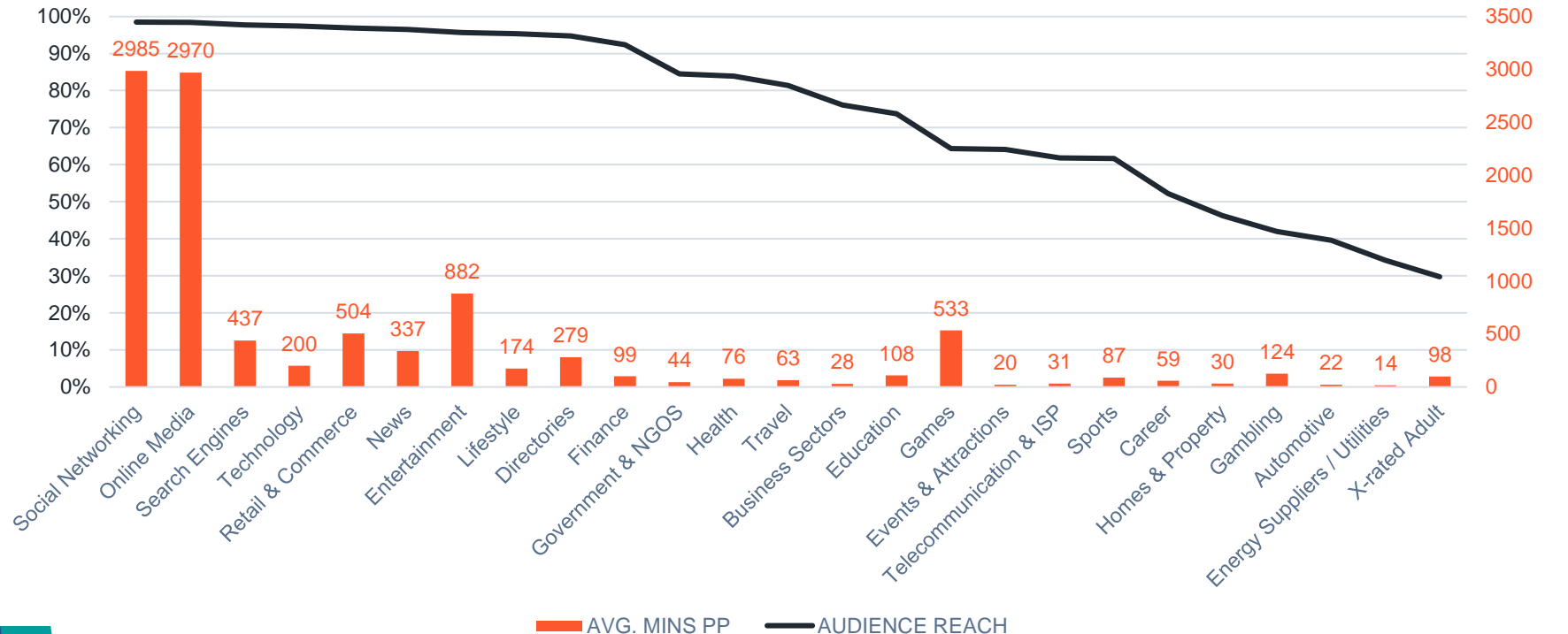


Reach & avg. mins pp by tier 1 category – Apr 22

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



Reach



AVG. MINS PP

AUDIENCE REACH

Source: Ipsos, Ipsos iris Online Audience Measurement Service, Apr 2022

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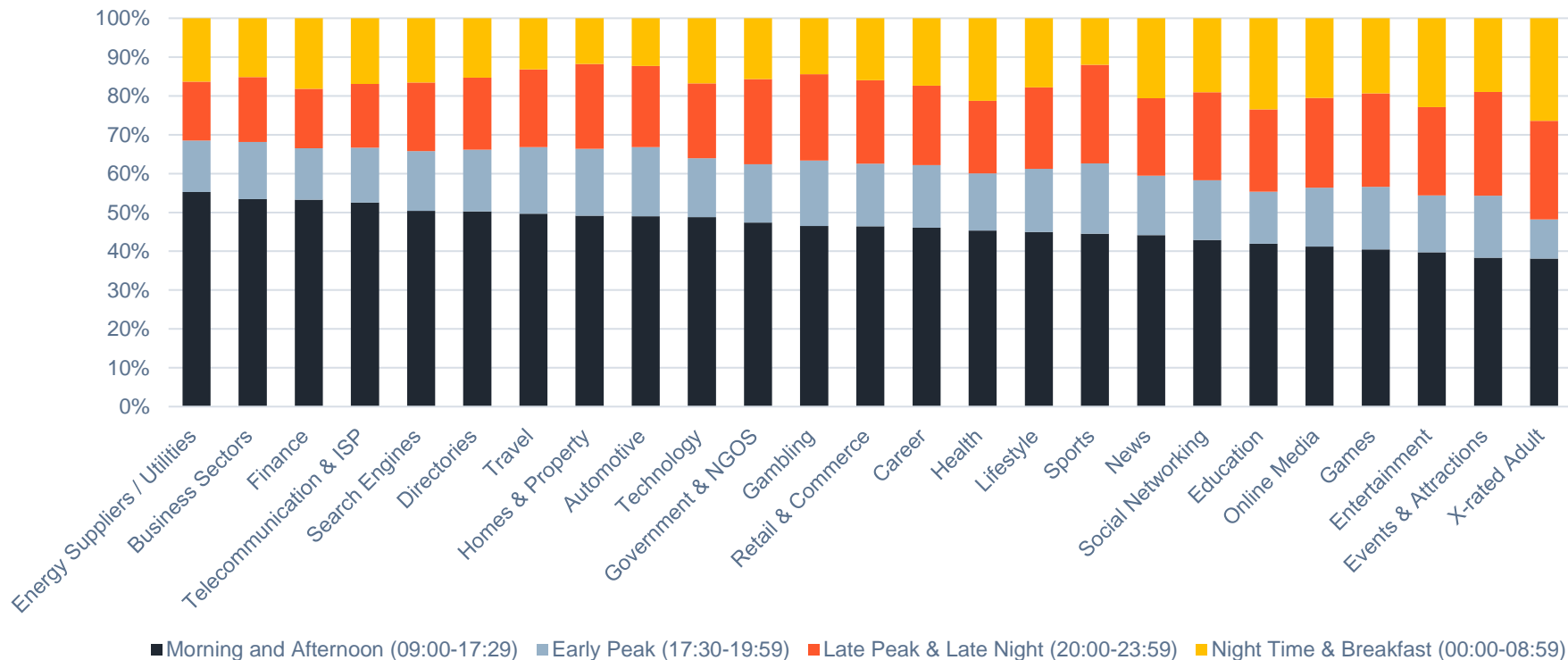
NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'



Share of minutes (%) by daypart by tier 1 category



Utilities, business and finance during the day; Entertainment, Events & Gaming in the evening.



Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

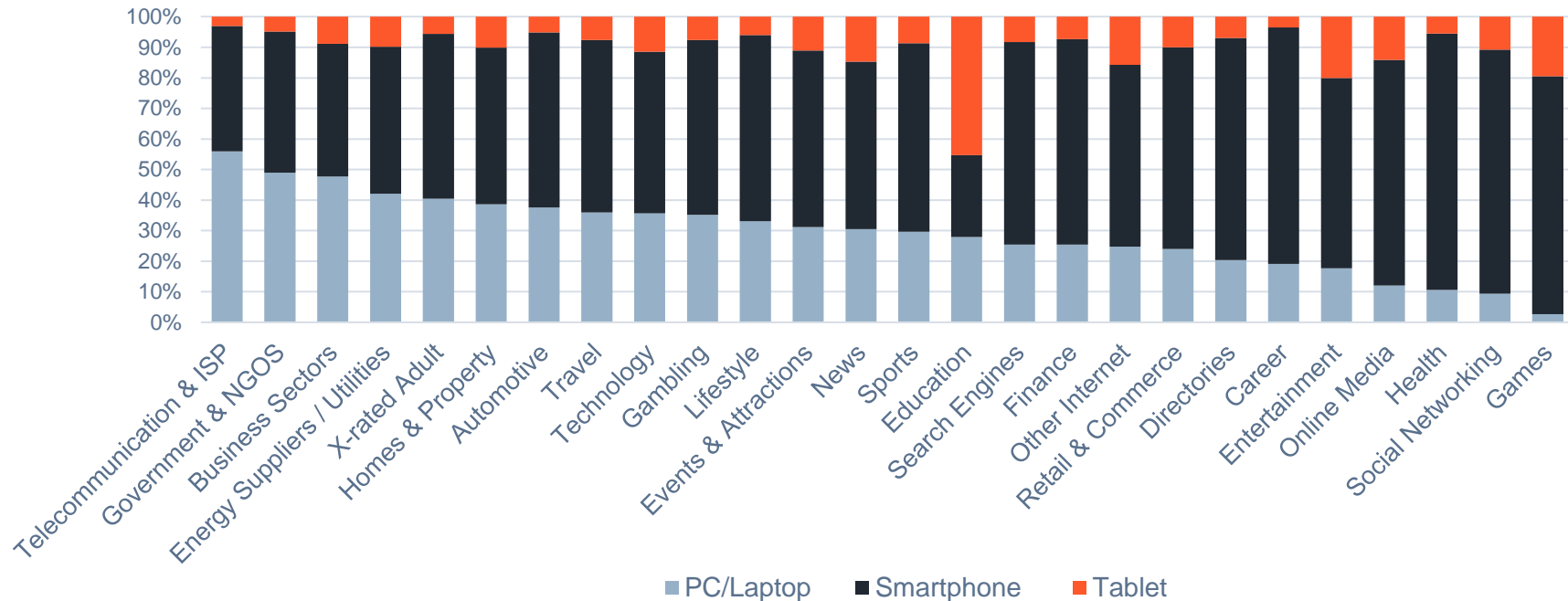
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NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

Share of minutes by device by tier 1 category



Content type significantly influences choice of device. PC still key for Telcos but Tablet now dominant for education



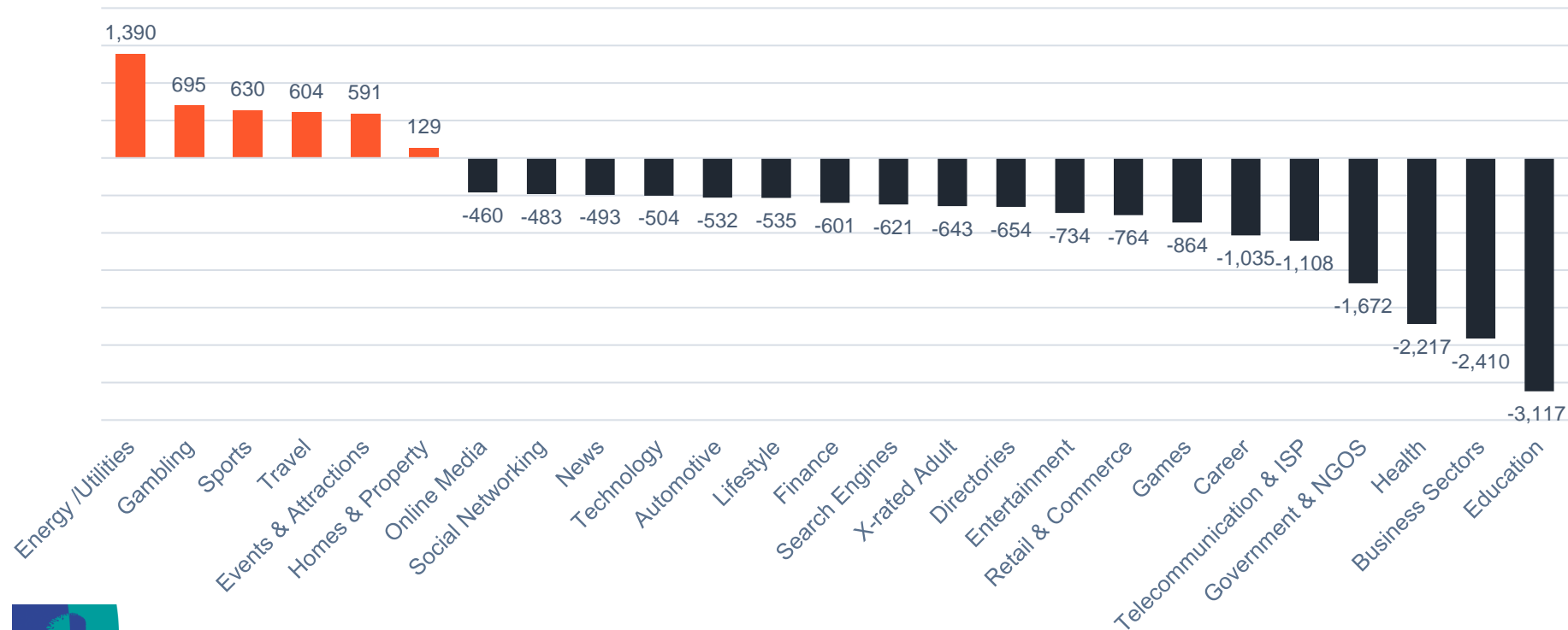
Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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

Tier 1 category audience change (000s): Jan-Apr 22

The energy price cap & Grand National resulted in uplifts to the utilities and gambling categories



Source: Ipsos, Ipsos iris Online Audience Measurement Service, January and April 2022

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

Travel category audience change: Jan-Apr 2022

Interest in domestic and overseas travel increased as life returns to normal



		AUDIENCE (000S)			
MEDIA		JAN '22	APR '22	Change (%)	Change (abs)
TOTAL TRAVEL CATEGORY		40,038	40,643	1.5 % ↑	604
T2	Online Travel Agents	21,380	21,969	2.8 % ↑	588
T2	Rail/Train	18,368	20,515	11.7 % ↑	2,147
T2	General Travel	18,940	20,435	7.9 % ↑	1,495
T2	Hotel/Resort & Home Sharing	19,911	20,115	1.0 % ↑	205
T2	Other Travel	14,993	17,556	17.1 % ↑	2,562
T2	Airline	11,743	13,067	11.3 % ↑	1,323
T2	Tourist Information	11,648	13,021	11.8 % ↑	1,373
T2	Automotive Transportation	10,687	11,878	11.1 % ↑	1,191
T2	Travel (news only)	9,767	10,413	6.6 % ↑	646
T2	Cruise	4,344	3,289	-24.3 % ↓	-1,055



Source: Ipsos, Ipsos iris Online Audience Measurement Service, January and April 2022

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

Retail growth categories: Jan-Apr 2022



Despite a decline for the total retail category, five retail categories bucked the trend. Easter contributed to Confectionery and Flowers' growth with CadburysGiftsdirect increasing by ¾ million

		AUDIENCE (000S)			
MEDIA		JAN '22	APR '22	Change (%)	Change (abs)
TOTAL RETAIL CATEGORY		49,127	48,364	-1.6 %↓	-764
T2	Ticketing	22,431	25,237	12.5 %↑	2,806
T2	Snacks & Confectionery	4,341	5,209	20.0 %↑	868
T2	Flower Shopping	2,560	2,917	13.9 %↑	357
T2	Movies/Cinema	7,999	8,350	4.4 %↑	351
T2	Photos	17,329	17,674	2.0 %↑	345



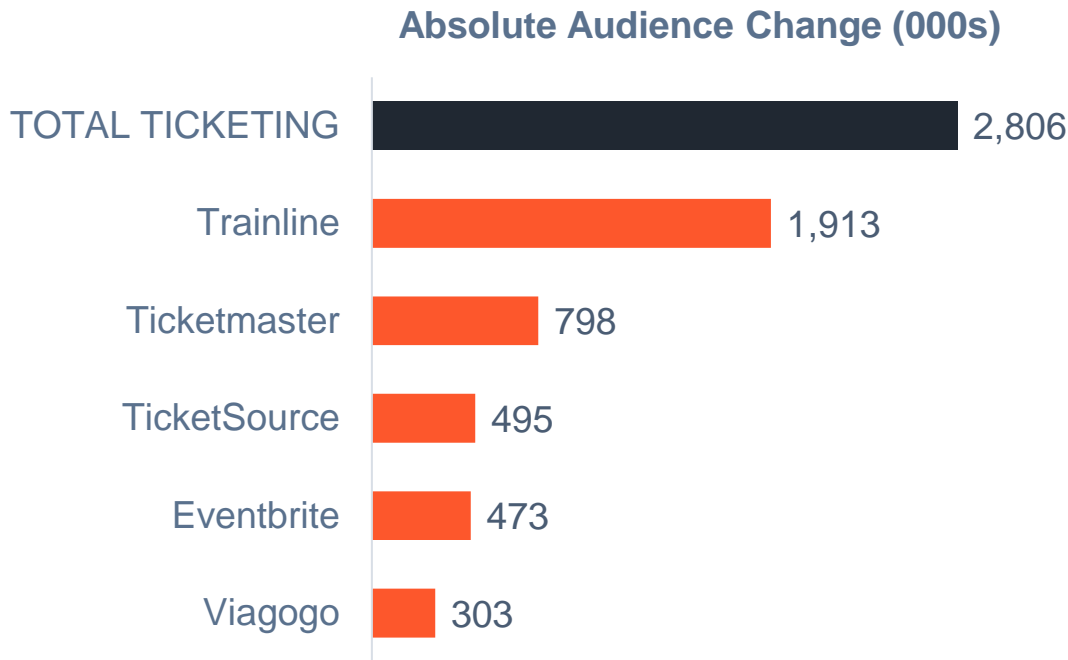
Source: Ipsos, Ipsos iris Online Audience Measurement Service, January and April 2022

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Retail ticketing category: Jan-Apr 2022



The ticketing category continues to grow. The return to work for many and a rise in the number of 'in person' events contributed to increases for trainline and ticketing services



Source: Ipsos, Ipsos iris Online Audience Measurement Service, January and April 2022

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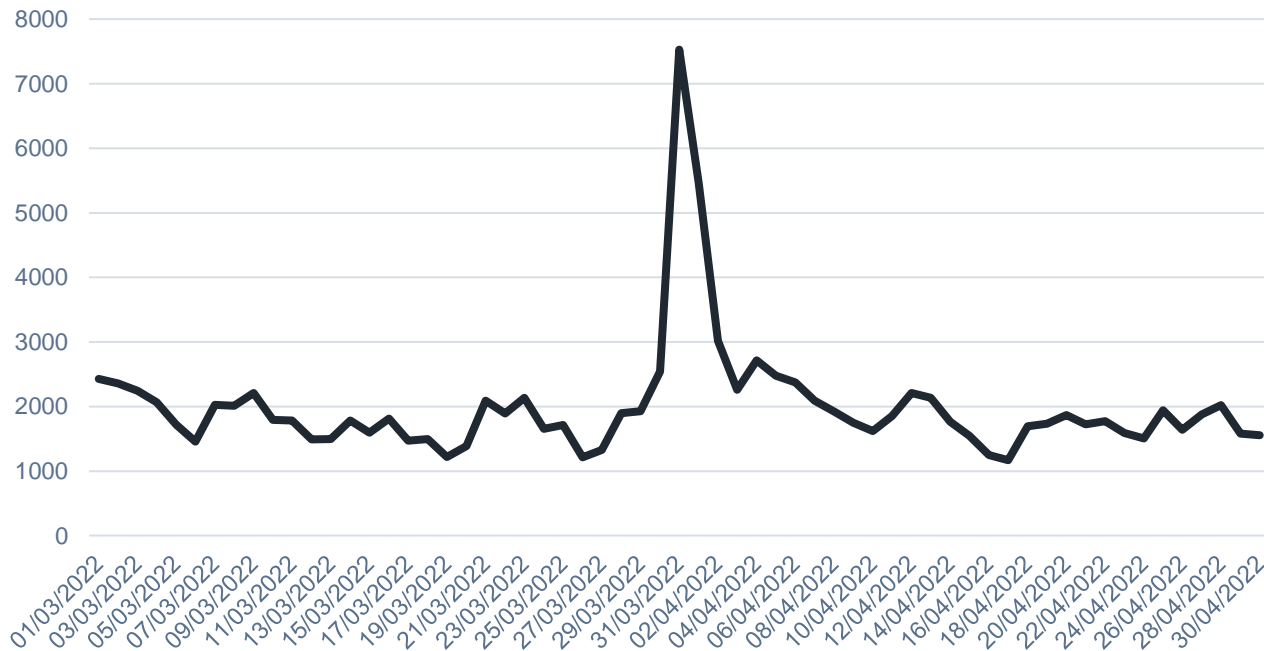
Topical insights



Energy/Utilities category - daily audience (000s)



The energy category audience rocketed to nearly 8 million on the day before price cap rise.

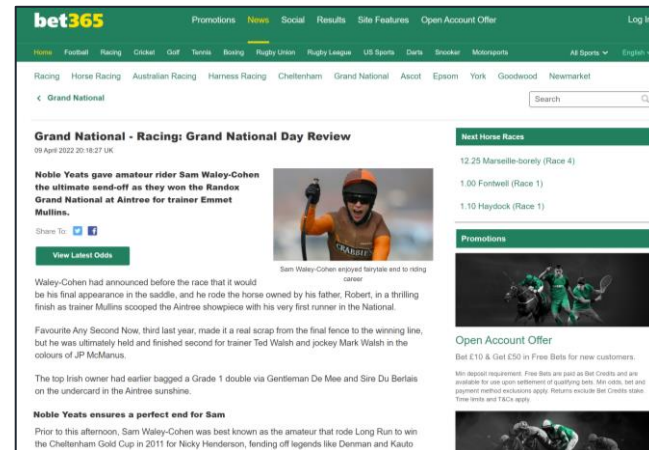
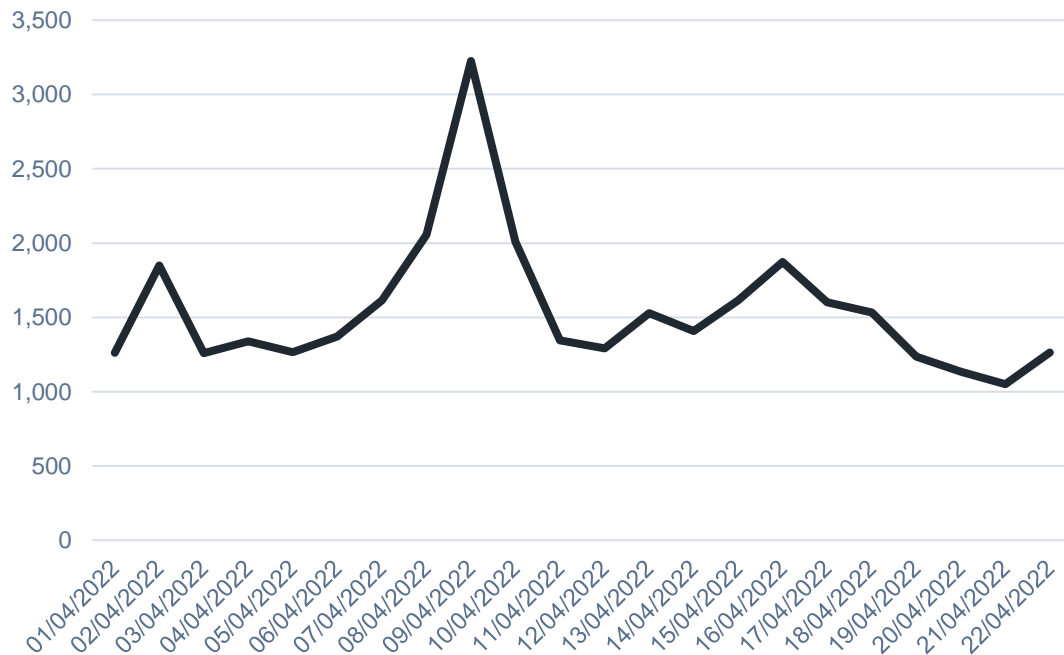


Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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

Online sports betting - daily audience (000s)

The online sports betting category peaked on the day of the Grand National (9th April)



Source: Ipsos, Ipsos iris Online Audience Measurement Service, April 2022

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



Online football news audience - reach (%) by city

Of those which had a premier league club, Liverpool topped the 'football news' readership table



38%

Total Internet Population (15+)

48%

Leeds

49%

Liverpool

38%

Wolverhampton

36%

London

30%

Southampton

38%

Newcastle Upon Tyne

42%

Manchester

43%

Leicester

33%

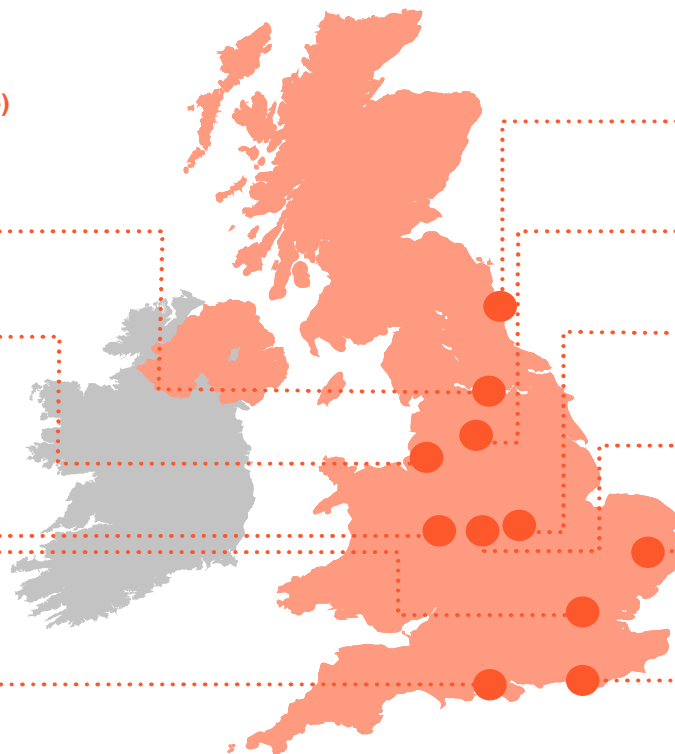
Birmingham

38%

Norwich

34%

Brighton



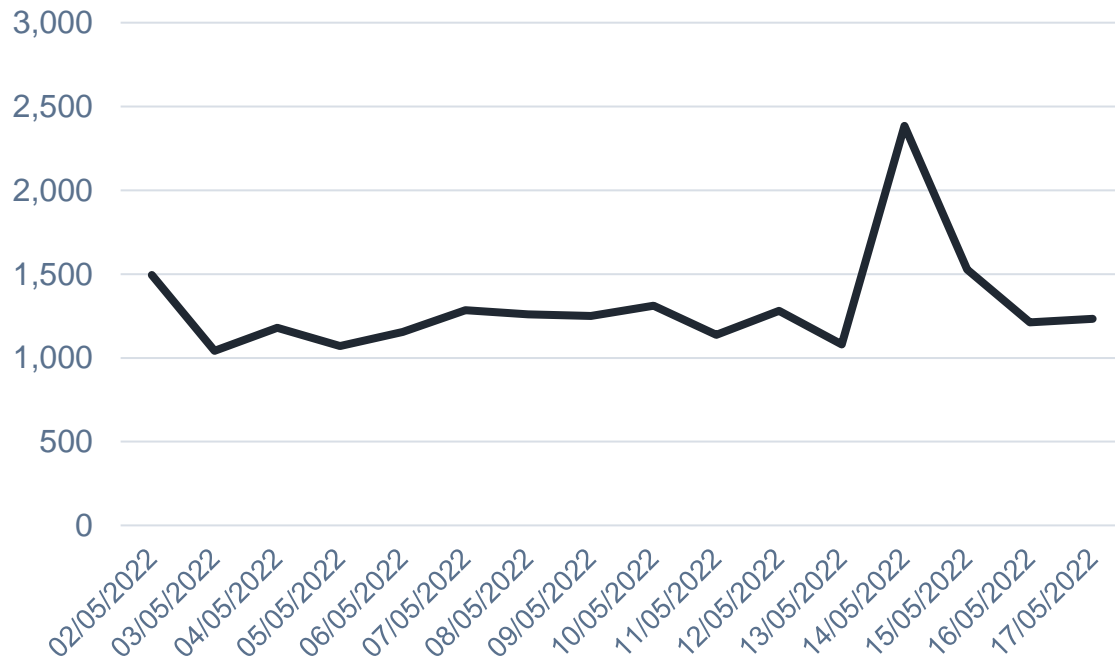
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Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



BBC iPlayer app - daily audience (000s)

BBC iPlayer's app audience soared to nearly 2.5 million on Eurovision and FA Cup Final Day



Source: Ipsos, Ipsos iris Online Audience Measurement Service, May 2022

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

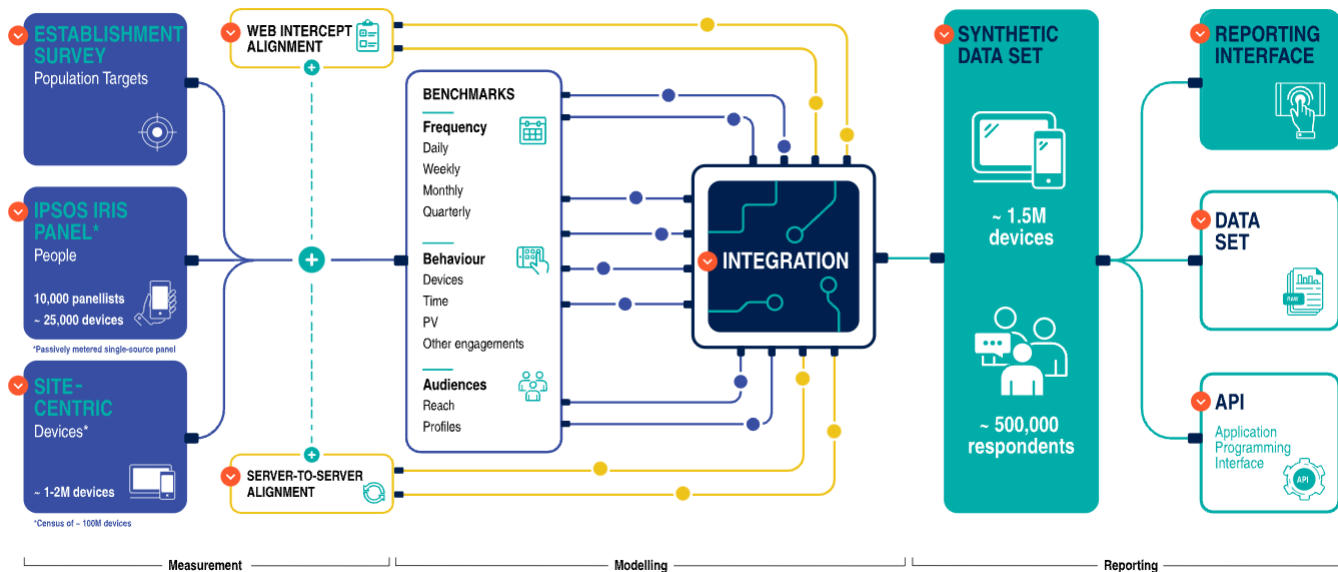
Methodology



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: <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/>