

UKOM

Online Market Overview

September 2024



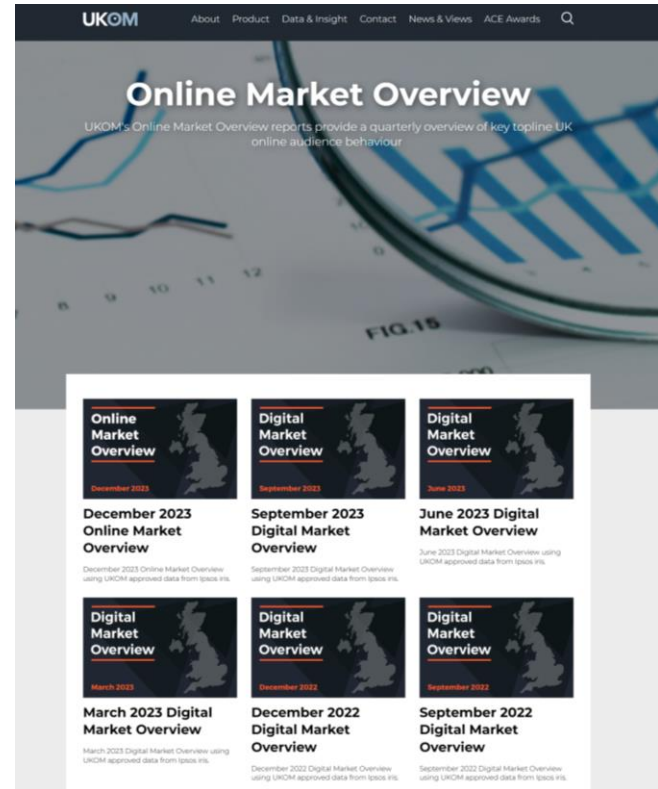
The UK Online Market Overview September 2024



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



Contents

The UKOM logo is a white circle containing the text 'UKOM' in a blue, sans-serif font. The background of the slide features a dark grey, high-angle view of several electronic devices: a laptop on the right, a tablet in the bottom center, and a smartphone in the bottom right corner. The devices are arranged in a way that suggests a digital or online environment.

UKOM

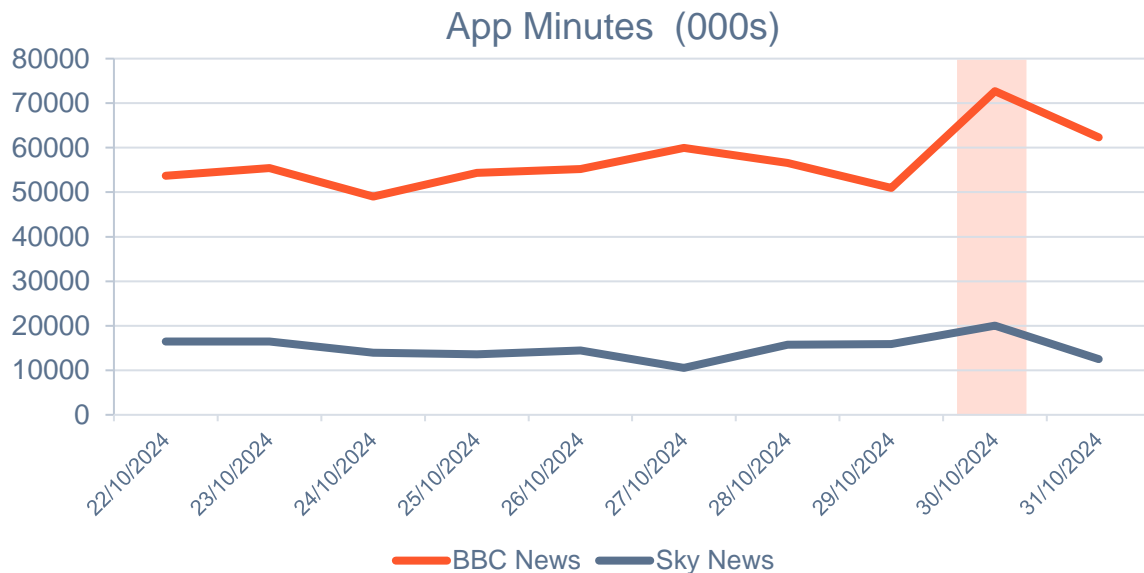
- In the news
- Key changes: Jun 24 – Sep 24
- The UK online audience
- Time online
- Top organisations and brands
- Top mobile apps



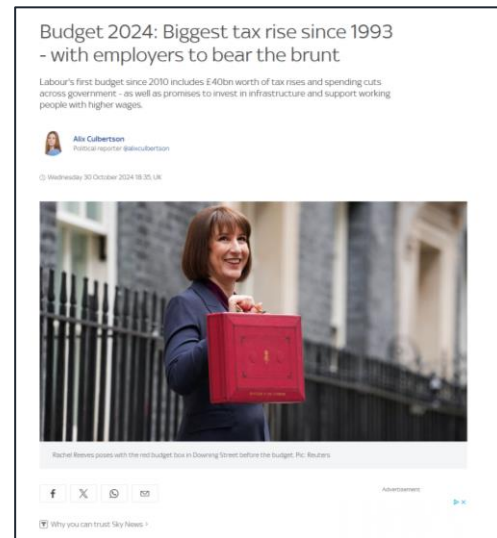
In the news



Oct topline: BBC and Sky News app audience & time increases on Budget Day – 30th October

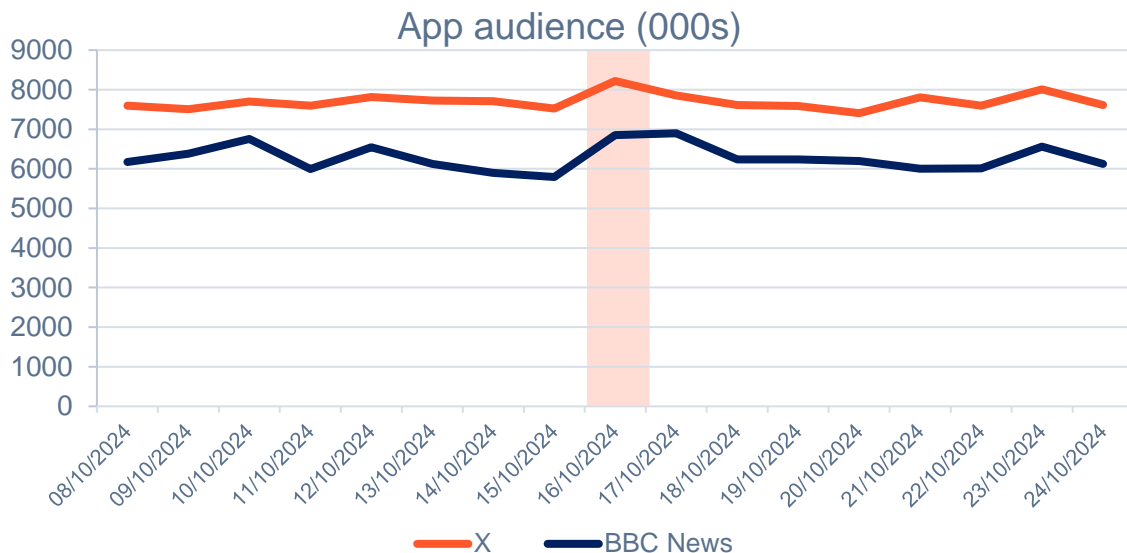


Media	Audience (000s)	D	Total Mins (000s)	D
BBC News (Mobile App)	7,061	17% ↑	72,689	43% ↑
Sky News (Mobile App)	1,843	19% ↑	20,029	26% ↑



Source: UKOM Ipsos iris Online Audience Measurement Service, **Daily Dashboard - Oct 2024**. D = v the day before
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Oct topline: BBC News and X audiences increase on the day Liam Payne's death was announced



Date	Audience (000s)	Audience Reach (%)				
X (Mobile App)	8,220	16.5%	9%	↑	9%	↑
BBC News (Mobile App)	6,851	13.7%	18%	↑	7%	↑

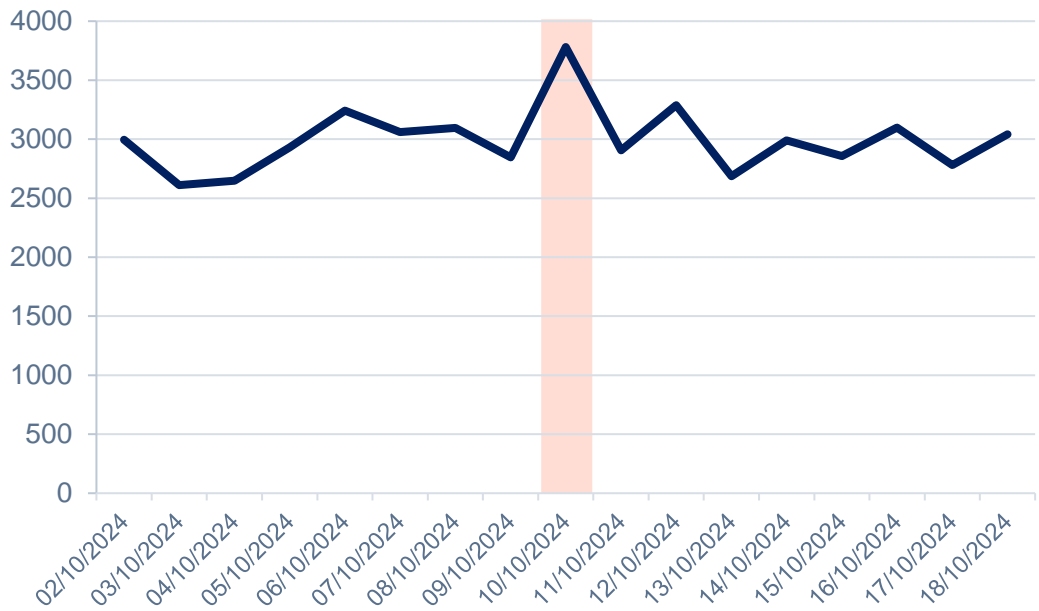
Source: UKOM Ipsos iris Online Audience Measurement Service, **Daily Dashboard - Oct 24**. D = v the day before, W = v same day the week before
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.



Oct topline: Almost 1 million more people visited the BBC weather app when it forecast hurricanes in error



BBC Weather app audience (000s)



BBC Weather (Mobile App)	10/10/24	W-O-W growth
Audience (000s) & Reach %	3,781 (7.6%)	45%
Total Mins (000s)	8,710	98%



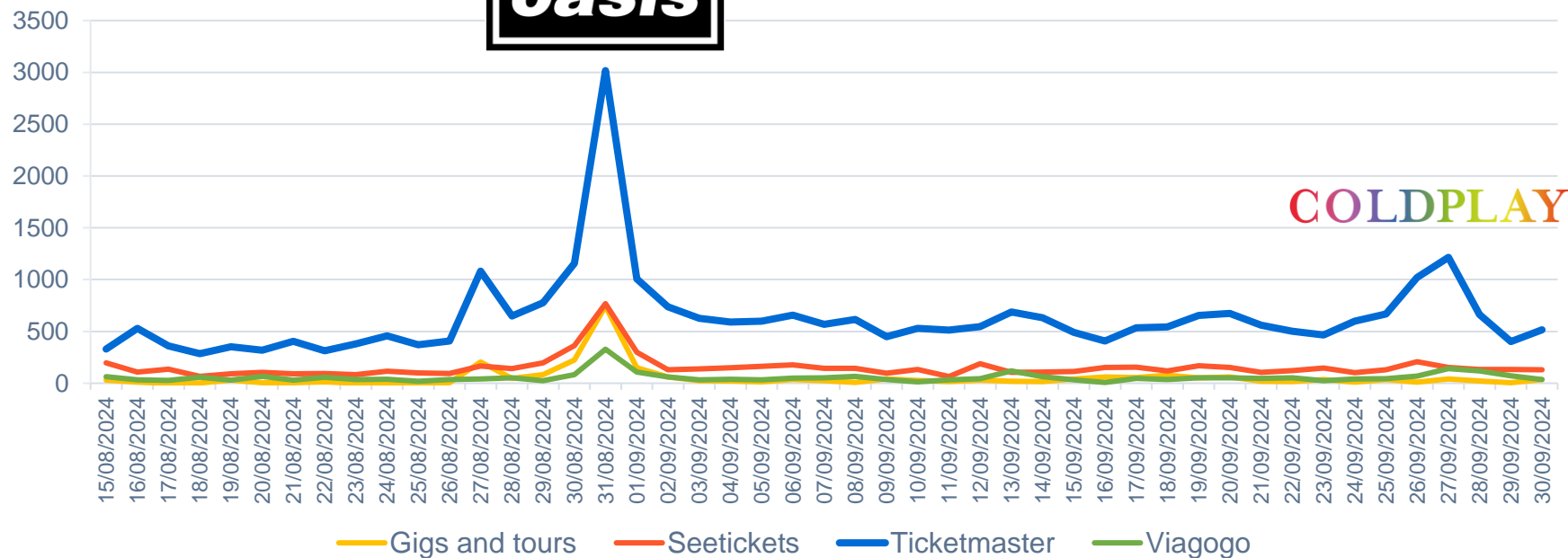
Source: UKOM Ipsos iris Online Audience Measurement Service, **Daily Dashboard - Oct 24**
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Oasis & Coldplay drove people to ticketing websites in August and September



oasis

Audience (000s)

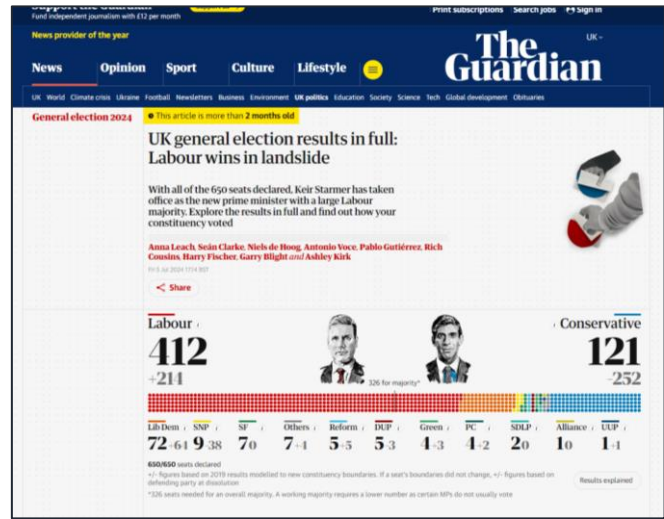
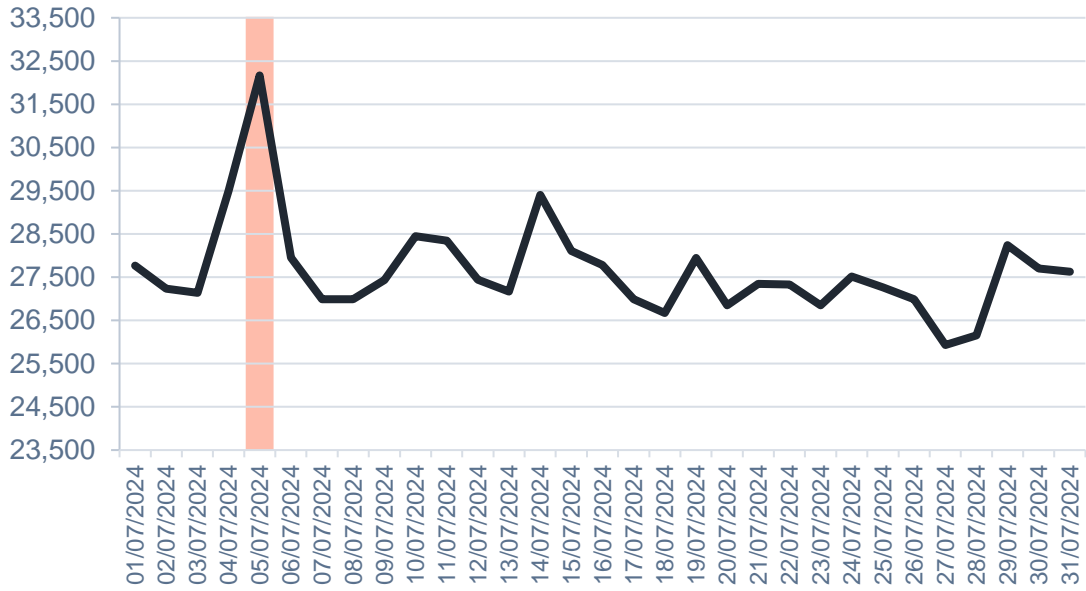


Source: UKOM Ipsos iris Online Audience Measurement Service, Aug & Sep 2024
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

The general news category audience peaked on 5th July due to the Election results



General news category audience (000s)



	Daily Audience (000s)	Daily Reach (%)	Ave Mins PP
5/7/24	32,166	64.8	20.3
July Average	27,653	55.7	13.1



Source: UKOM Ipsos iris Online Audience Measurement Service, Jul 24
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.
 NB: The Y axis starts from 23,500 rather than 0 to better illustrate the uplift

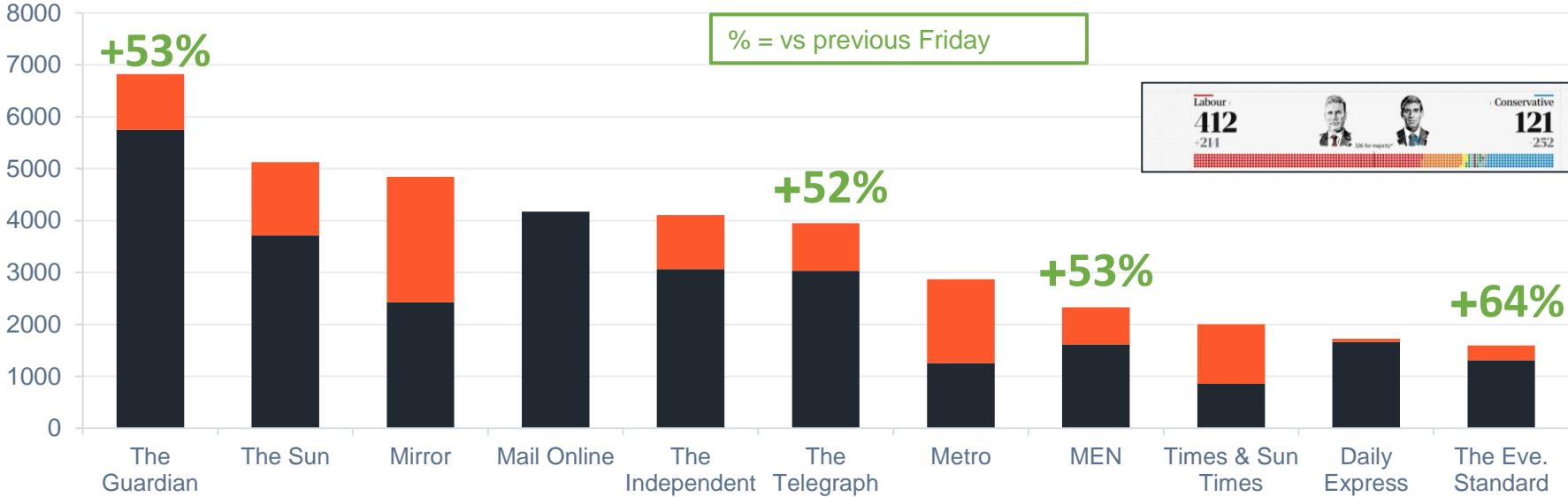
On July 5th the Guardian was the online newspaper brand which attracted the biggest audience



Audience (000s)

- Incremental audience from Apple News
- Website, app & tagged distributed content on social media

% = vs previous Friday

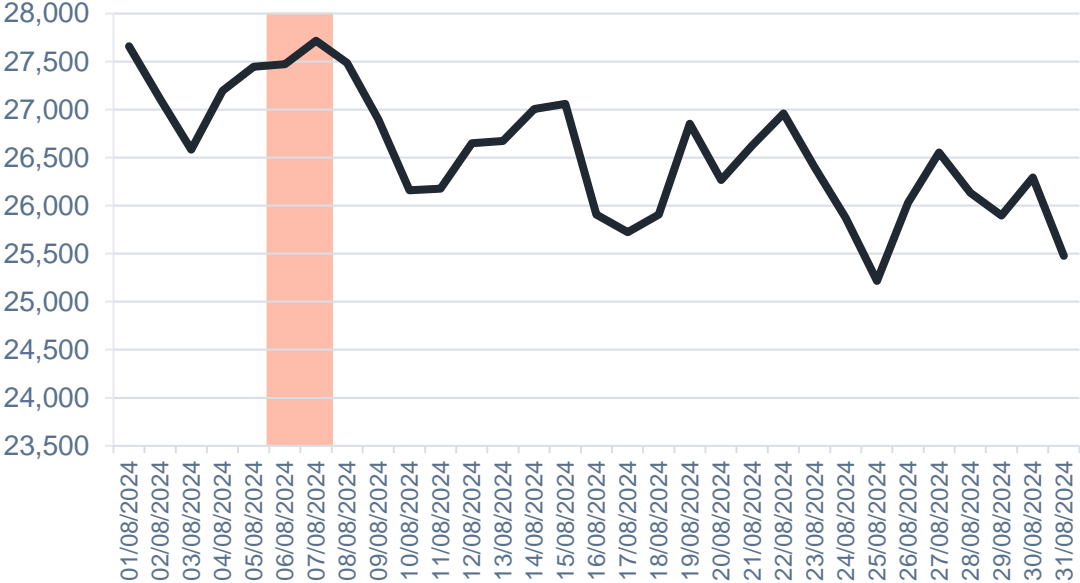


Source: UKOM Ipsos iris Online Audience Measurement Service, 5th Jul 24 and 28th Jun 24
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

In August, the general news category peaked early in the month when riots dominated headlines



General news category audience (000s)



BBC NEWS

Home UK World Business Politics Tech Science Health Family & Education E

Why are there riots in the UK?

7 August 2024
Updated 9 August 2024

The fatal stabbing of three young girls at a dance class in the seaside town of Southport, in the north of England, has been followed by the worst unrest the UK has seen in more than a decade.

	Daily Audience (000s)	Daily Reach (%)	Ave Mins PP
07/08/2024	27,717	55.8	14.0
Aug Average	26,561	53.5	12.9



Source: UKOM Ipsos iris Online Audience Measurement Service, Aug 24
 Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.
 NB: The Y axis starts from 23,500 rather than 0 to better illustrate the uplift

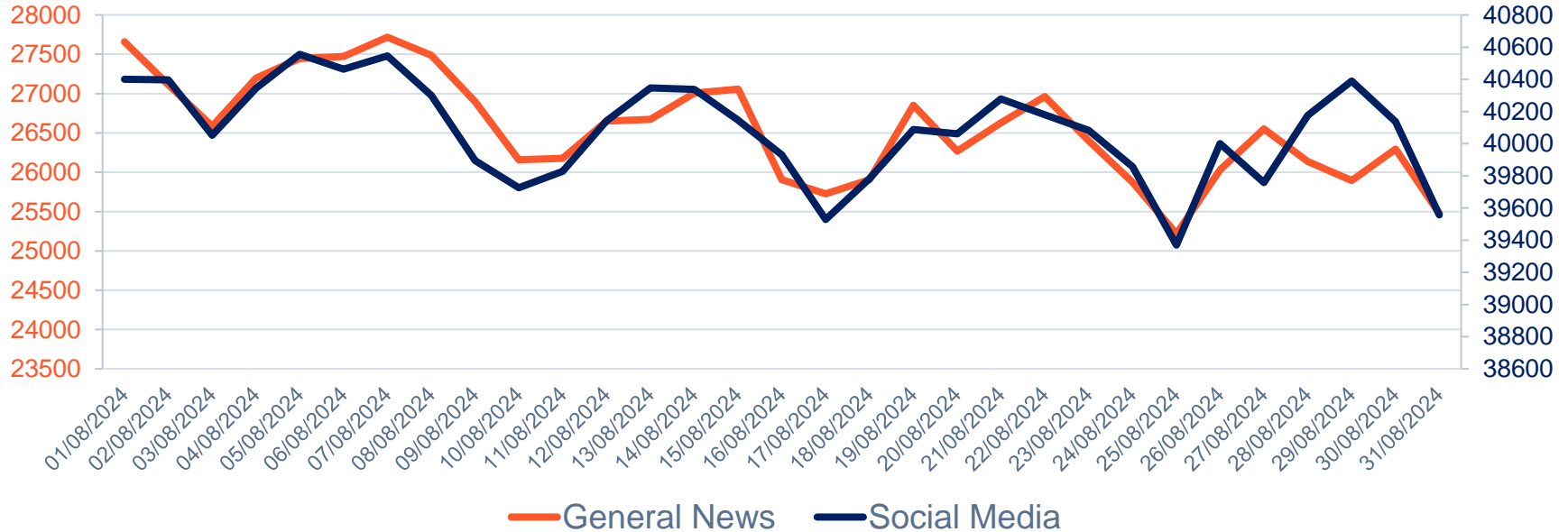
Social media & general news categories followed very similar audience trends in August



General news

August audience (000s)

Social Media



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

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

NB: The Y axis do not start from 0 to better show the trend

Males aged 25-44 and lower social grades are most likely to use Telegram



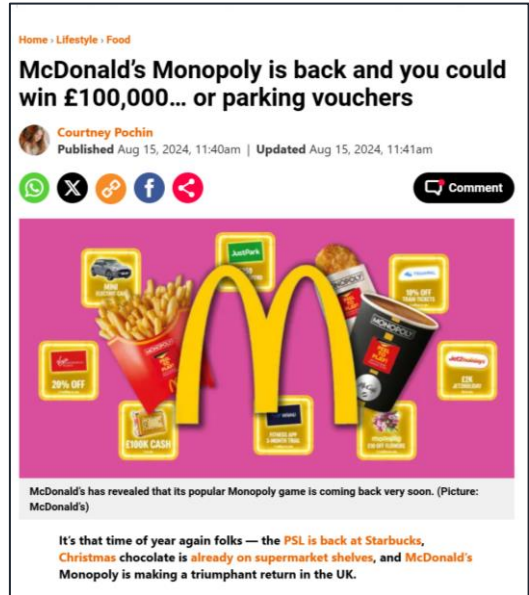
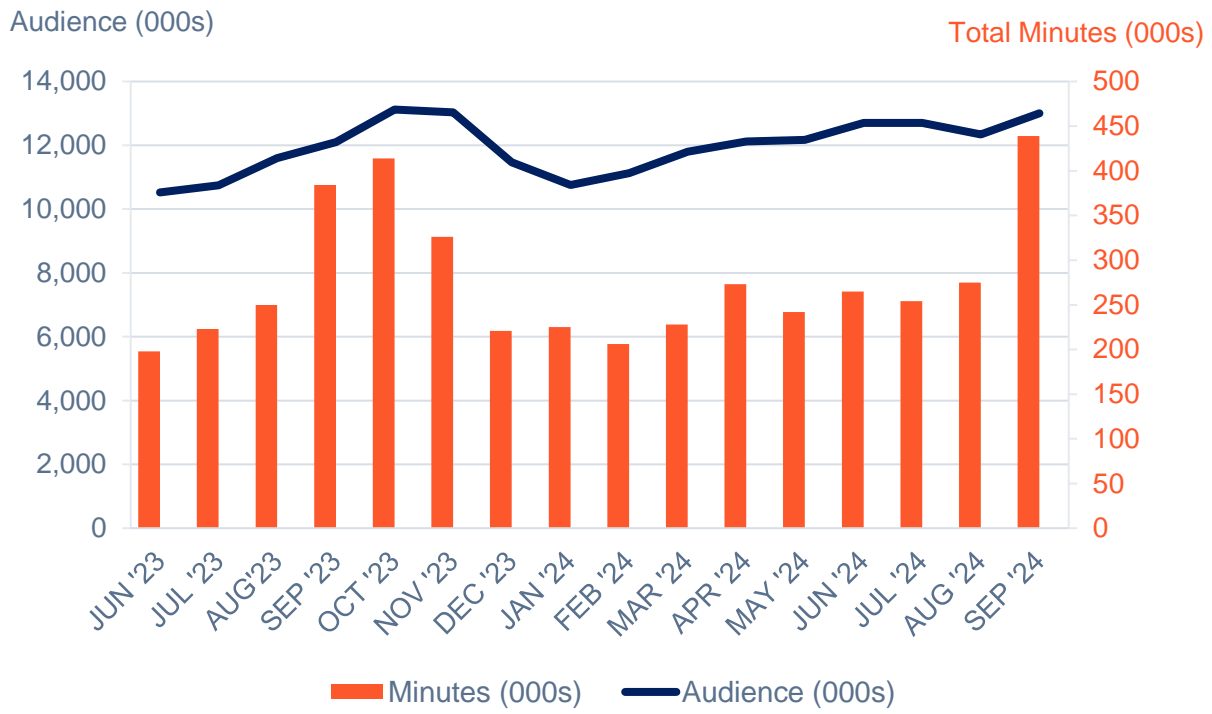
Sept audience: 3.7m
Avg daily audience: 1m

	AUDIENCE AFFINITY INDEX	AUDIENCE REACH (%)
Total Internet (15+)	100	7.5
Male	140	10.4
Male 18-24	158	11.8
Male 25-34	211	15.7
Male 35-44	206	15.4
Social Grade DE	122	9.1
Urban Adversity	117	8.8
Rising Metropolitans	140	10.5
Constrained Parents	174	13.0
Families Juggling Finances	148	11.1



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

McDonald's annual Monopoly promotion started in September - app audience and time grew



Source: UKOM Ipsos iris Online Audience Measurement Service, Jun 23 – Sep 24
 Base - All aged 15+ years using a PC, smartphone or tablet device(s). Mobile apps = apps across smartphone and tablet devices.

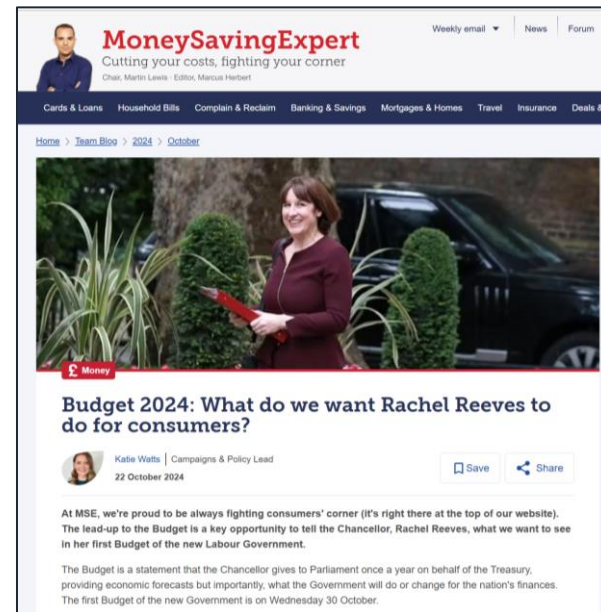
Older and wealthier individuals were more likely to visit MSE in the run up to the budget



MSE

MoneySavingExpert.com

FRESCO SEGMENTS	AUDIENCE REACH (%)	AUDIENCE AFFINITY INDEX	AVG. MINS PP
Total Internet Population (15+)	27.5	100	14:11
Young Dependents	17.8	65	09:44
Starting Out	17.5	64	09:06
Rising Metropolitans	23.7	86	09:02
Constrained Parents	20.0	73	10:42
Families Juggling Finances	26.0	94	12:23
Secure Homeowners	30.3	110	10:47
High Income Professionals	31.1	113	21:05
Older Working Families	30.0	109	16:06
Mid-Life Pressed Renters	26.6	97	12:17
Asset Rich Greys	32.7	119	17:49
Road to Retirement	31.4	114	13:23
Budgeting Elderly	32.9	120	18:08



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



Key changes: Jun 24 – Sep 24

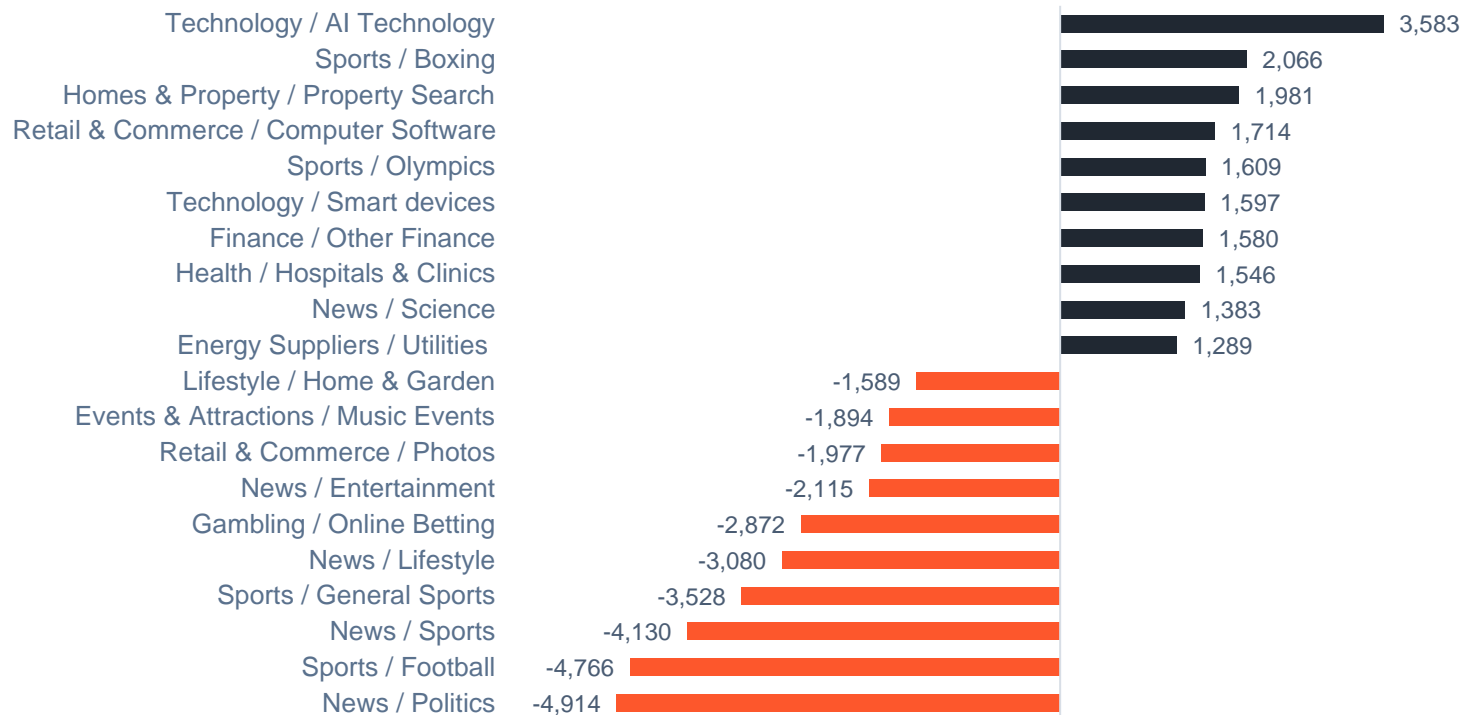


Tier 2 Category changes: winners and losers

The gain between June and September was highest for the AI and Boxing categories



Audience change: Jun 24 – Sep 24

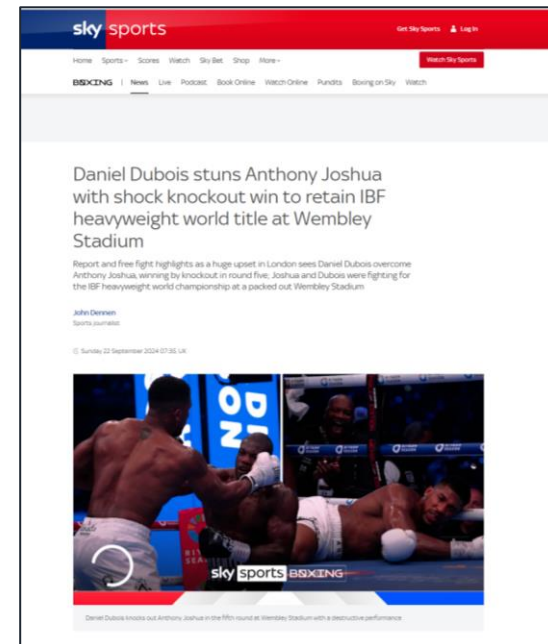
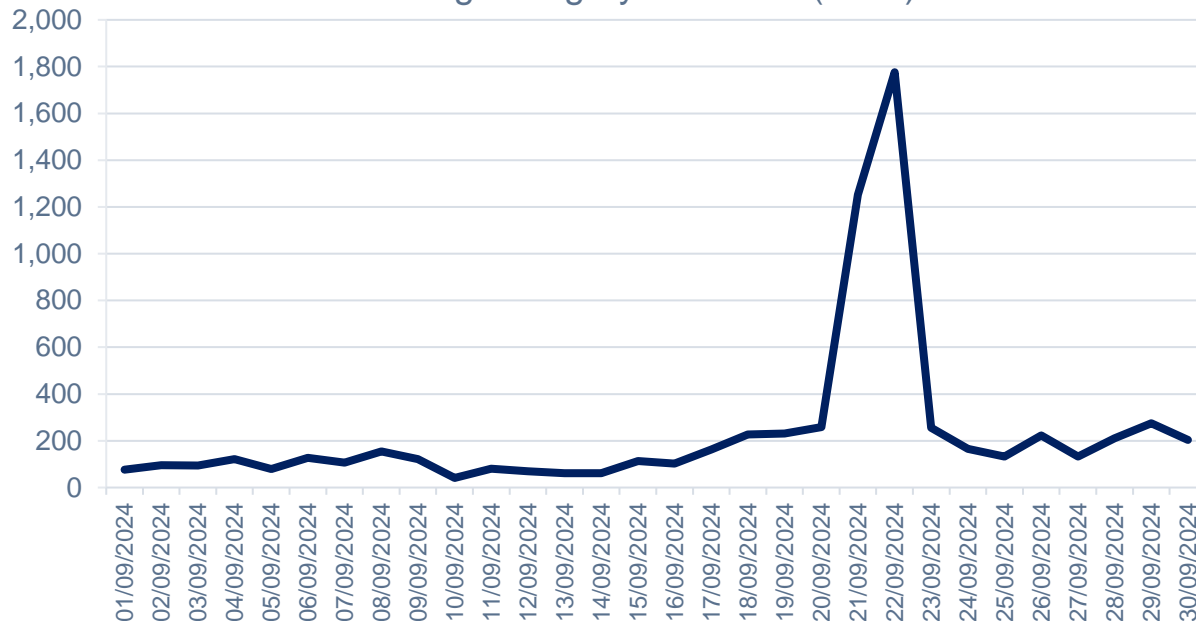


Source: Ipsos iris Online Audience Measurement Service, Jun 24 – Sep 24
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

Boxing category growth was driven by the Joshua v Dubois fight on 21st September



Boxing Category Audience (000s)

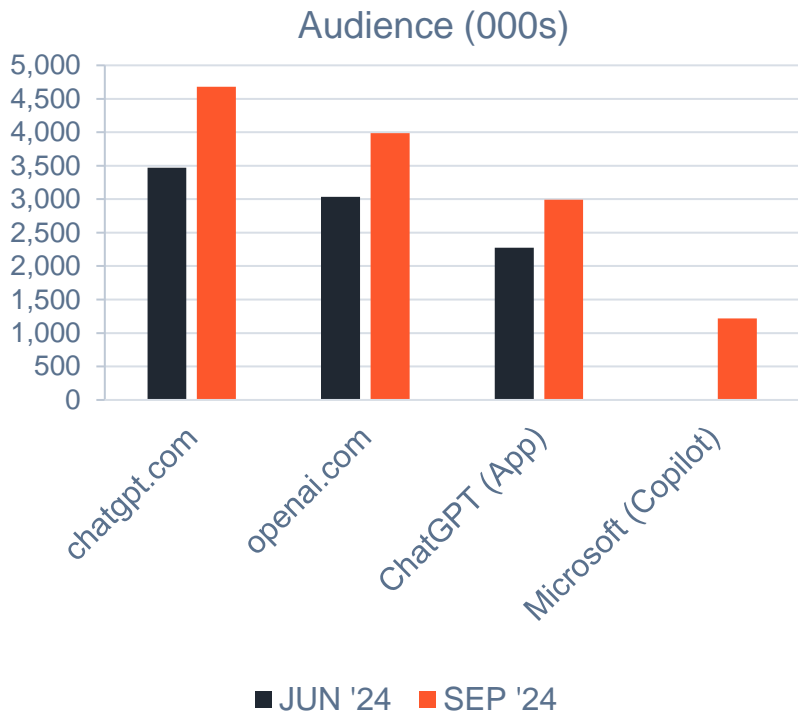


Source: Ipsos iris Online Audience Measurement Service, Jun 24 – Sep 24

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

Online AI services continue to grow

AI still attracts students & early adopters but is also popular among people with disabilities



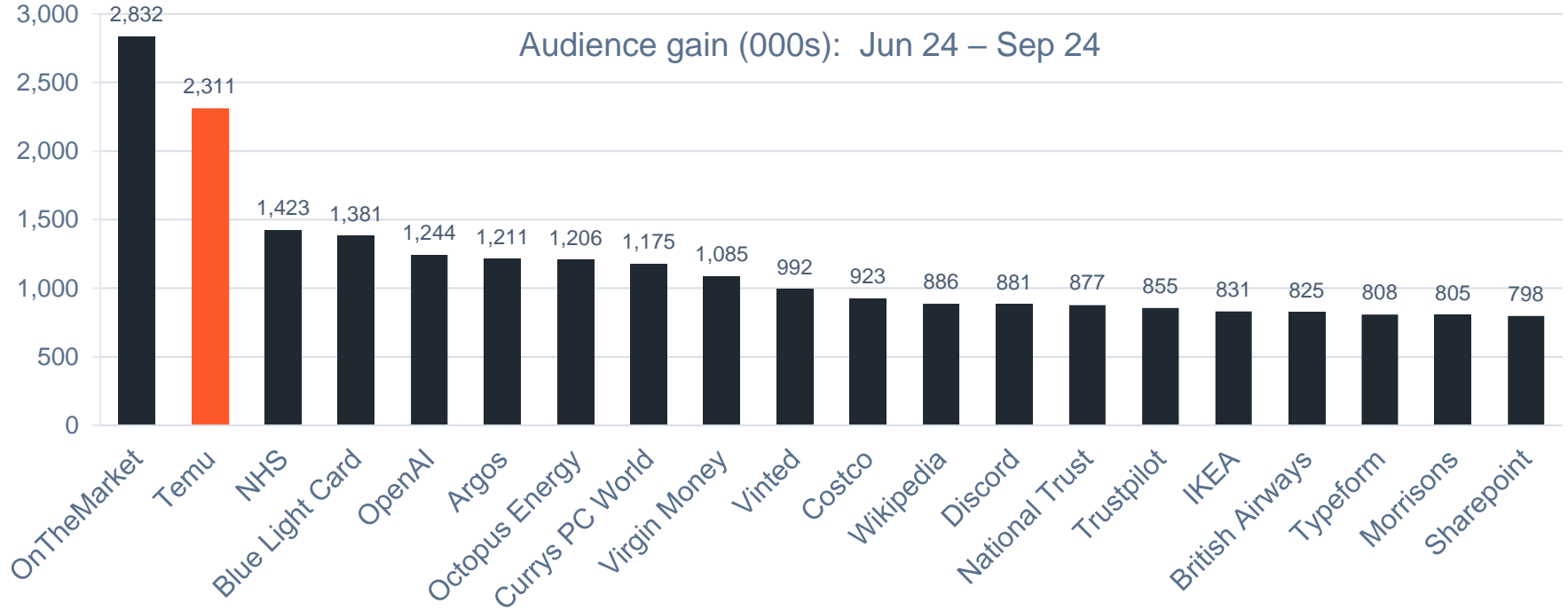
AI CATEGORY	AUDIENCE REACH (%)	AFFINITY INDEX	AVG. MINS PP
Total Internet Population (15+)	23.9	100	30:43
15-24	42.8	179	49:54
25-34	32.0	134	35:02
In full time education	38.7	162	49:29
Unemployed (seeking work)	34.2	143	75:57
Have learning disability	33.7	141	21:06
Have mental health condition	26.7	112	38:19
Have vision impairment	27.4	114	66:18
Interested in any technology that saves me time	28.1	118	44:03
Try to keep up with developments in technology	30.7	128	37:19



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

Brands* adding most audience : Jun 24 – Sep 24

Temu's audience grew by 12% Jun-Sep with growth highest among 15-24s (29%)



Source: Ipsos iris Online Audience Measurement Service, Jun 24-Sep 24

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

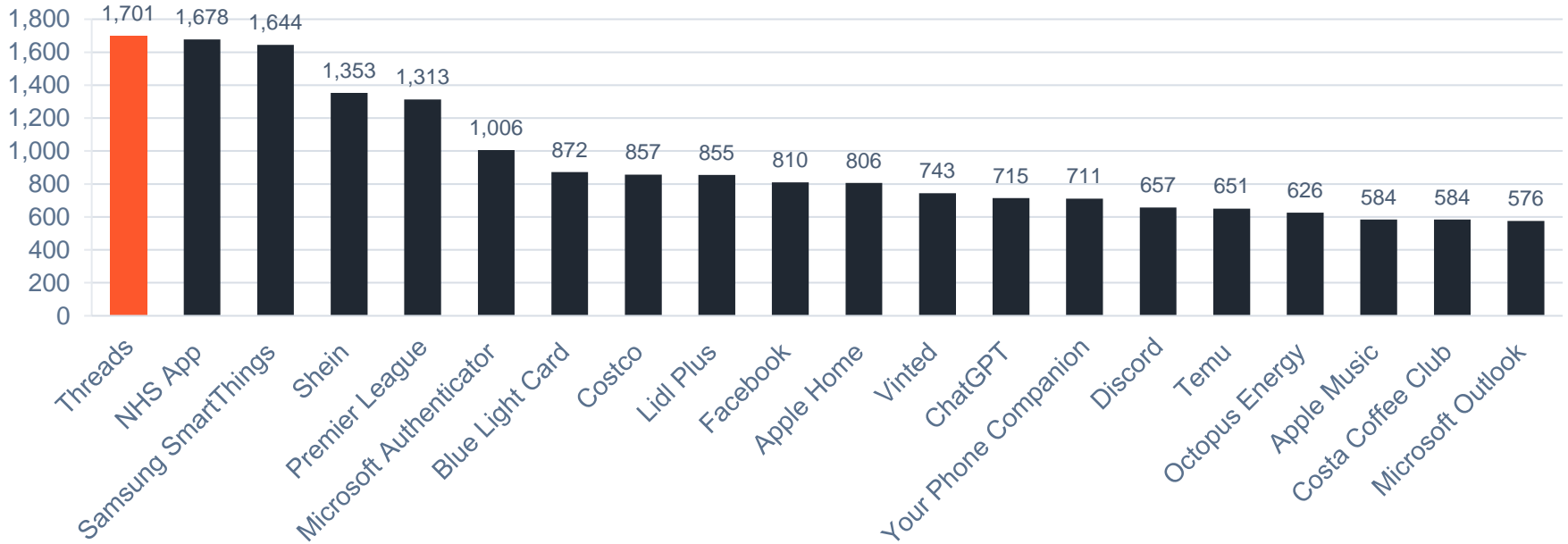
*Based on the top 200 brands by audience reach

Mobile apps adding most audience : Jun 24 – Sep 24

Threads added the most audience between June and September



Audience gain (000s): Jun 24 – Sep 24



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

Social media audience growth: Mar - Jun 24



X declines after being buoyed in June by the Football Euros

	AUDIENCE (000S)			
	JUN '24	SEP '24	Change (%)	Change (abs)
TOTAL SOCIAL MEDIA CATEGORY	48,656	48,665	0.0%	10
YouTube	45,997	45,738	-0.6%	-259
Facebook & Messenger	44,923	45,626	1.6%	703
Instagram (incl Threads)	38,167	38,281	0.3%	114
Reddit	26,292	26,819	2.0%	527
TikTok	26,903	26,574	-1.2%	-329
X	23,798	22,346	-6.1%	-1,452
LinkedIn	18,795	18,712	-0.4%	-83
Pinterest	13,631	13,427	-1.5%	-204
Snapchat	12,016	12,230	1.8%	214
Nextdoor	8,263	8,049	-2.6%	-214

X biggest decline between June & September was among Females – down by 9% or 953,483




Reddit continues to grow – audience in Sept was 2% higher than June with growth highest among 45-54s (+7%) and 55+ (5.3%)



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

Competitors to X are experiencing growth but are a long way behind for audience and engagement



	AUDIENCE (000S)				AVG. MINS PP			
	JUN 24	SEP 24	Change (%)	Change (abs)	JUN 24	SEP 24	Change (%)	Change (abs)
 X	23,798	22,346	-6.1%	-1,452	271:52	253:29	-6.8%	-18:23
 Threads	5,066	6,957	37.3%	1,891	77:58	100:12	28.5%	22:15
 Bluesky	87	473	445.1%	386	16:31	53:16	222.6%	36:45



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

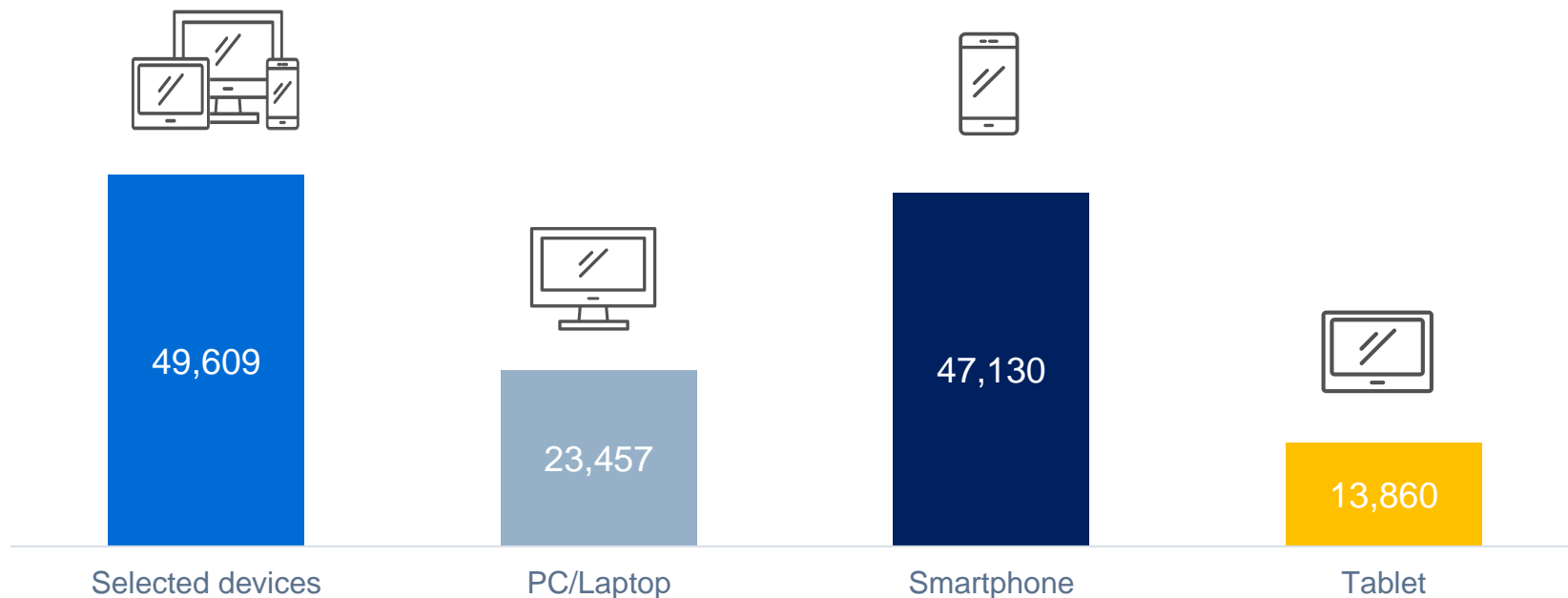
The UK online audience

UKOM



Online audience by devices used (000s)

More than twice as many people use smartphones than computers



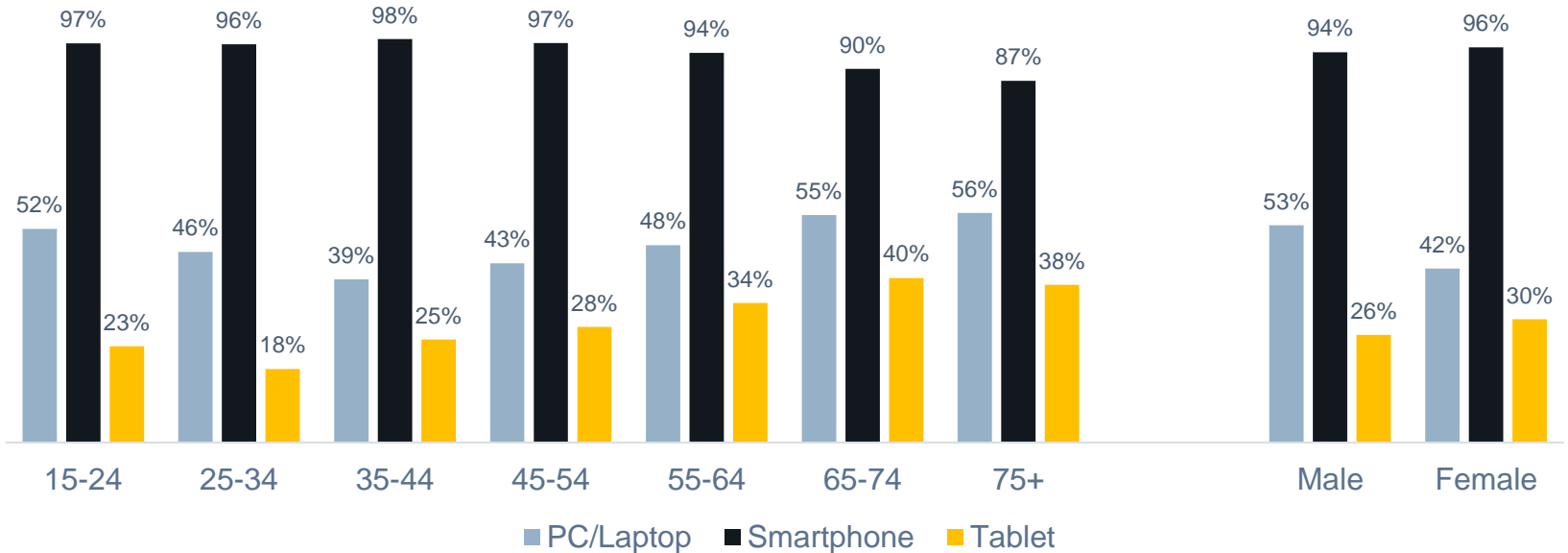
Source: UKOM Ipsos iris Online Audience Measurement Service, Sep 24

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, Sep 24

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

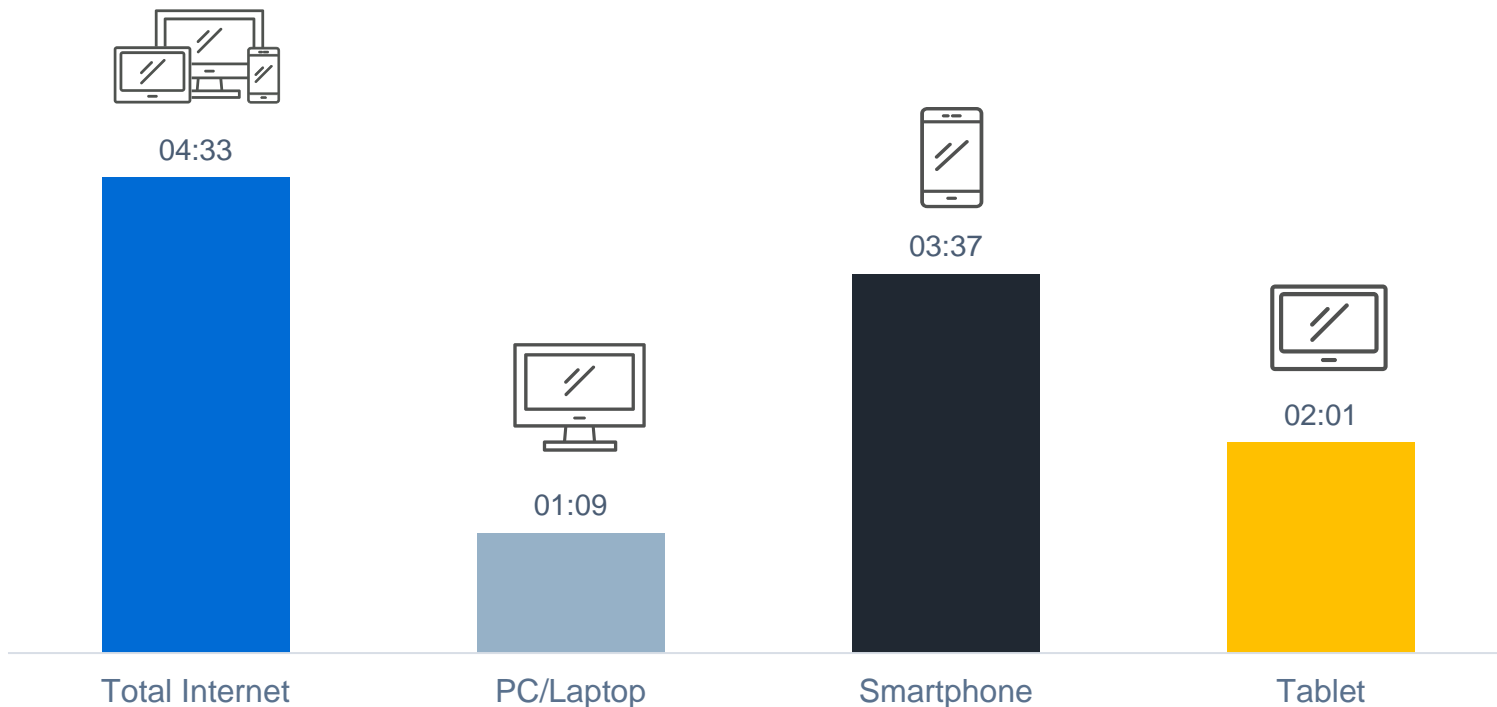
Time online



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



The UK internet population spends on average 4hrs 33 minutes online each day



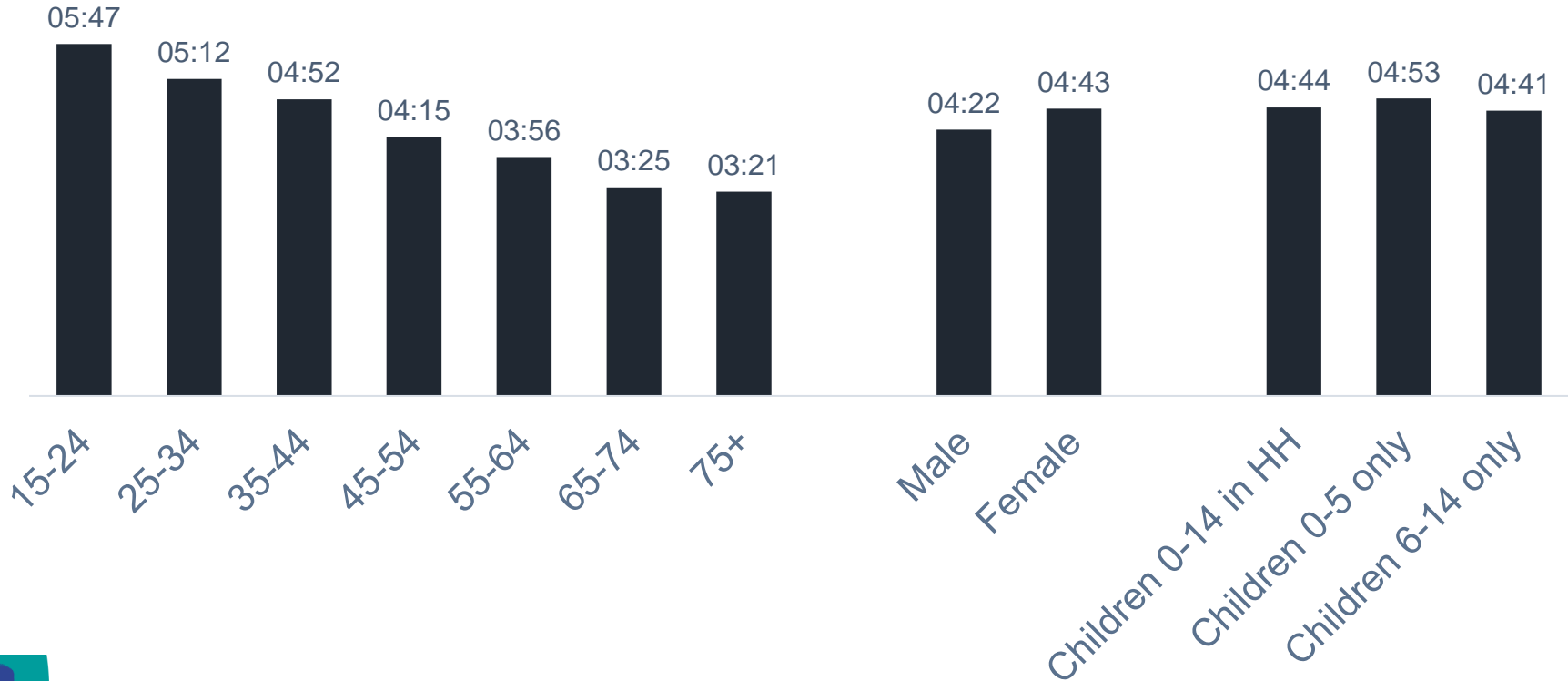
Source: UKOM Ipsos iris Online Audience Measurement Service, Sep 24

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 spent online per day by demographics



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

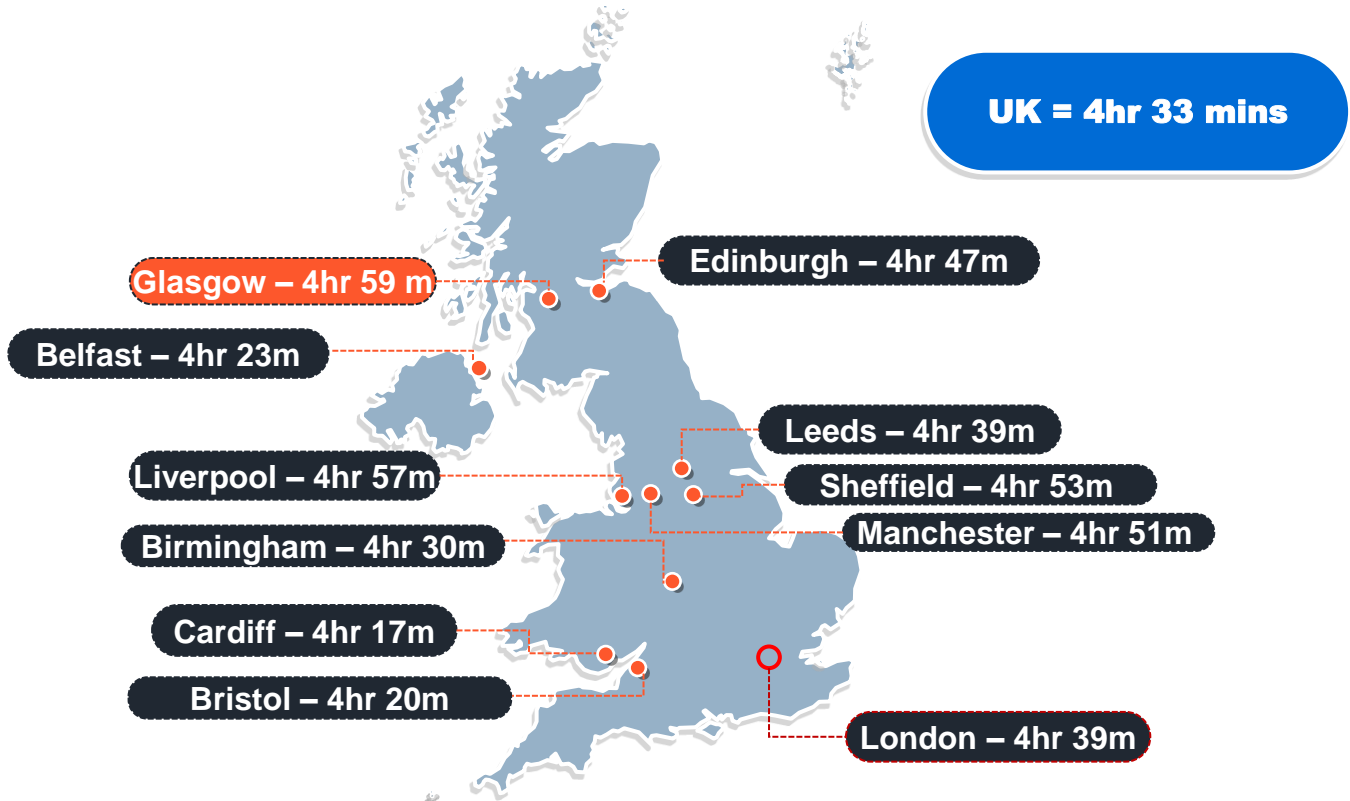


Source: UKOM Ipsos iris Online Audience Measurement Service, Sep 24

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

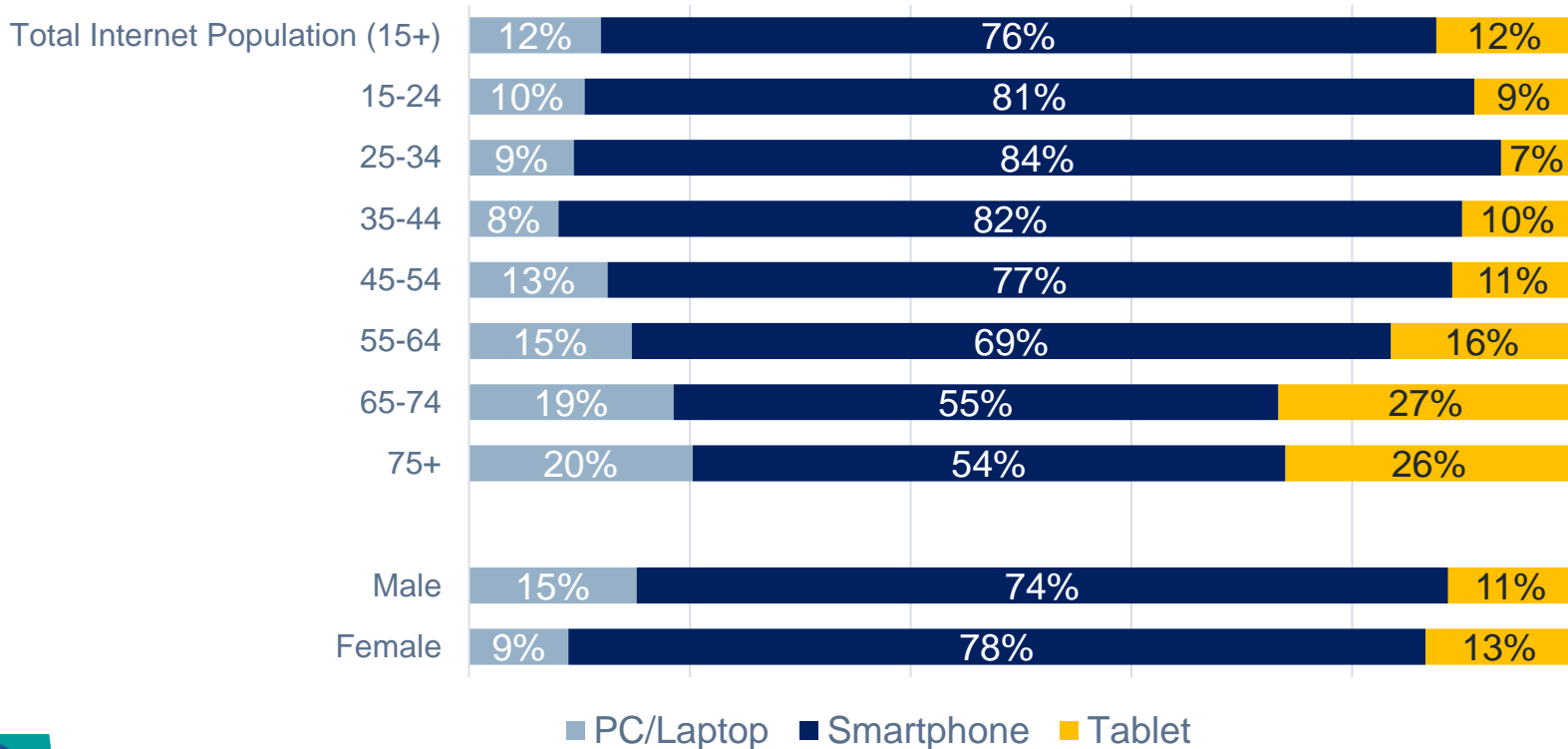
Average time online per day by city (hh:mm)

Of the major UK cities, residents Glasgow spent most time online per day in September



Device share of minutes by age and gender

Three-quarters of minutes are spent on smartphones. Tablet share is higher among older people



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

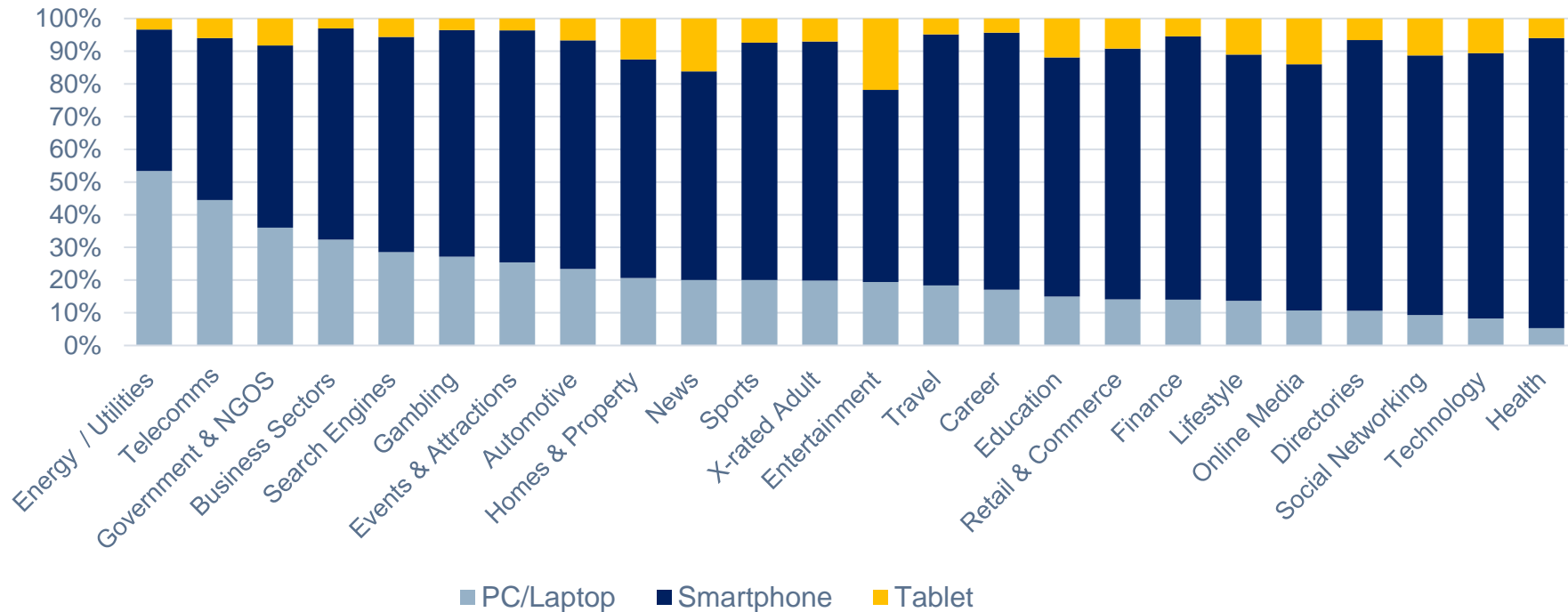
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month



Share of minutes (%) by device by category



Energy and Utilities is now the only category where PC/Laptops account for the most minutes



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

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

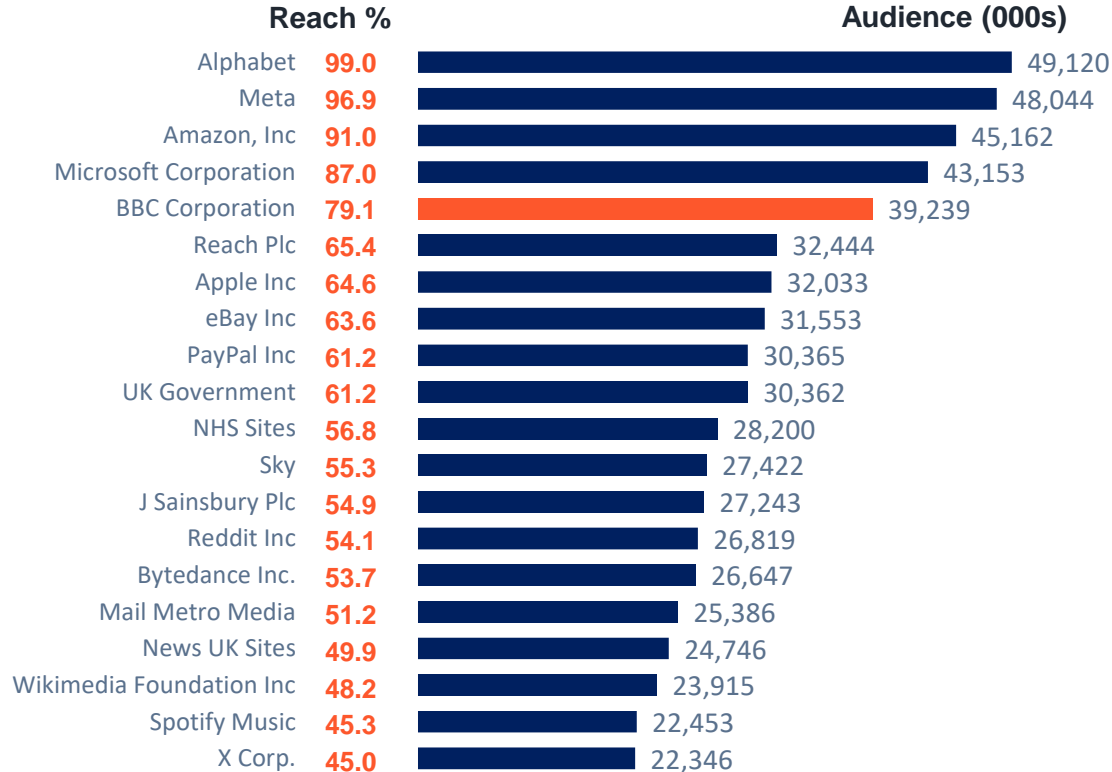
NB Duration (Total Mins (MM) & Avg. Mins Per Person) not measured for sites or apps running in device background/'out of focus'

Top organisations and brands



Top 20 organisations by audience

The BBC is the highest ranked British organisation for online audience reach.



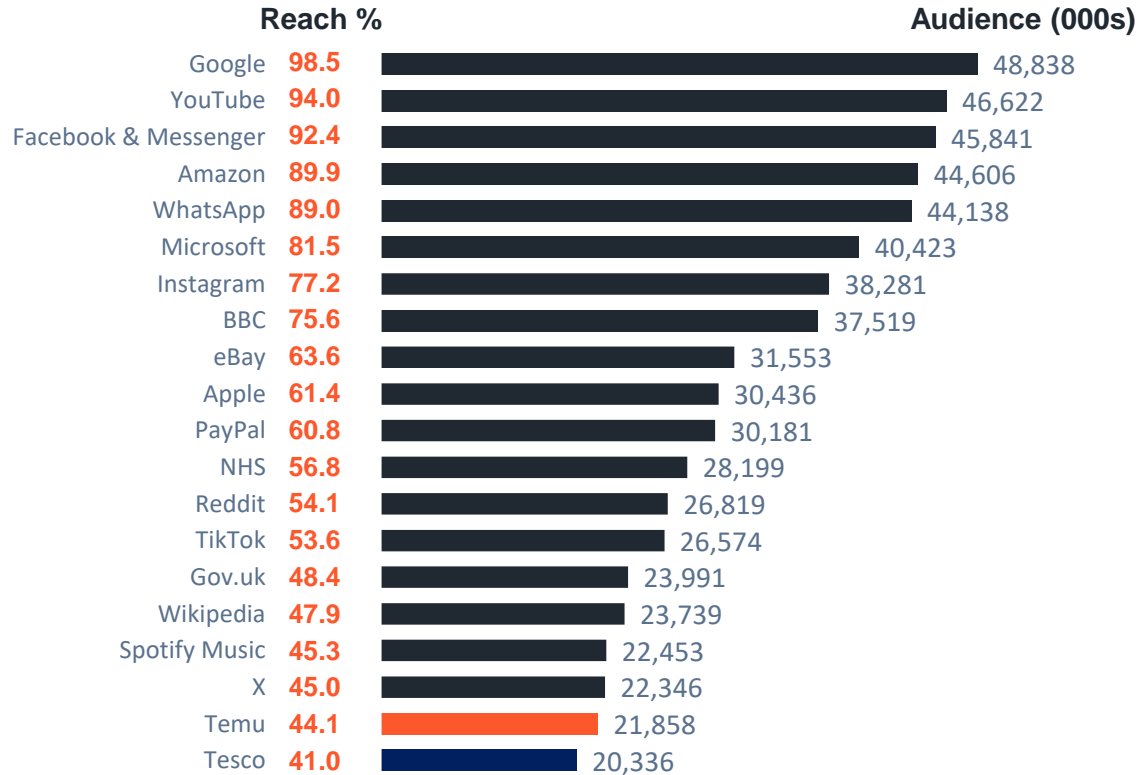
Source: UKOM Ipsos iris Online Audience Measurement Service, Sep 24

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



Top 20 online brands by audience

Temu, which only launched in the UK in 2023, now attracts a bigger audience than Tesco



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

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



Top 20 brands by time spent

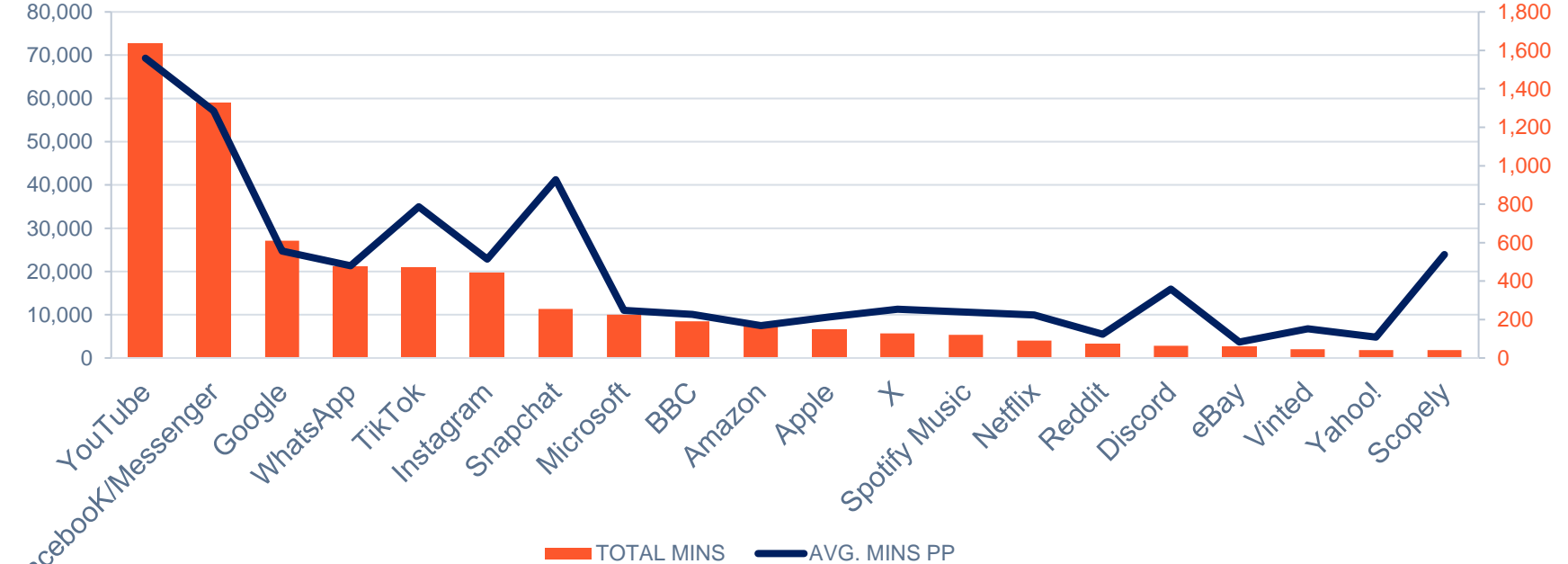


Social media brands dominate the top 10 for time online, driven by high average minutes per person.

Minutes (MM)

Avg.Mins PP

Total Minutes (MM) and Avg. Mins Per Person



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

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

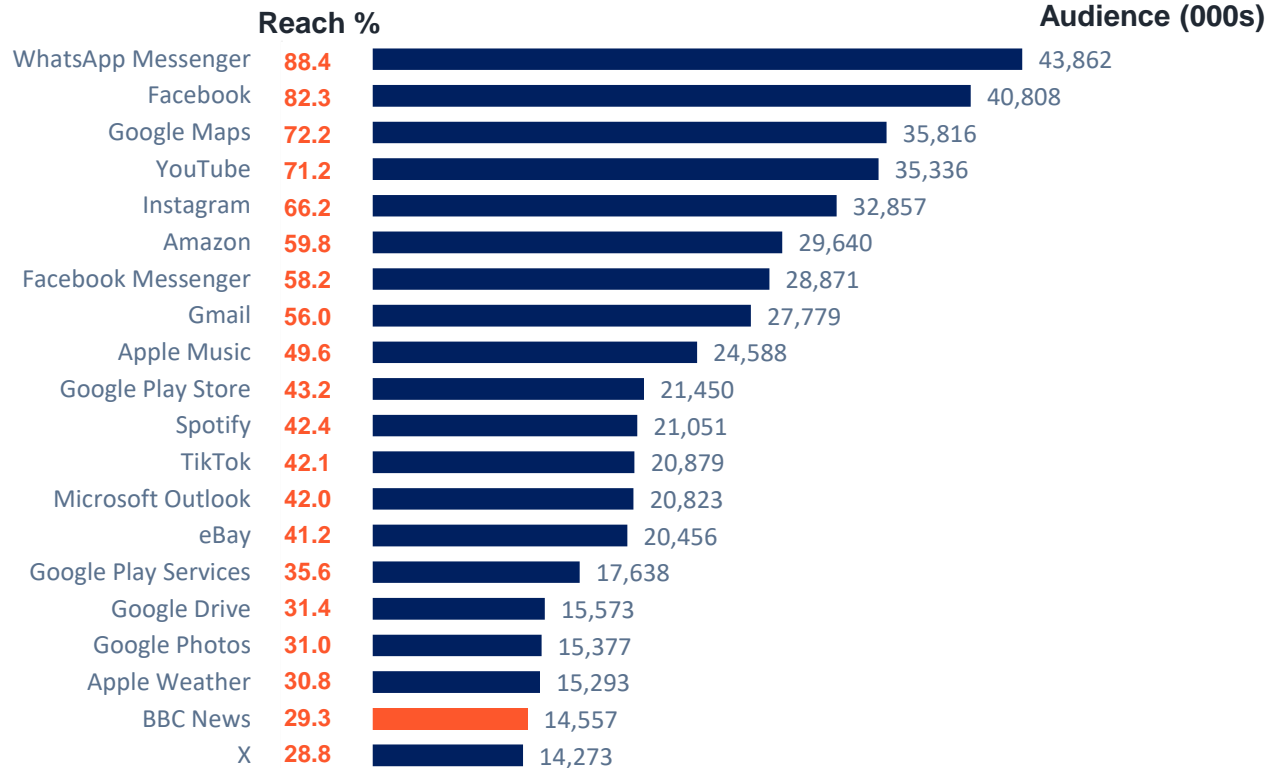
NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'.

Top mobile apps



Top 20 mobile apps by audience

BBC News is the only app in the top 20 from a British organisation



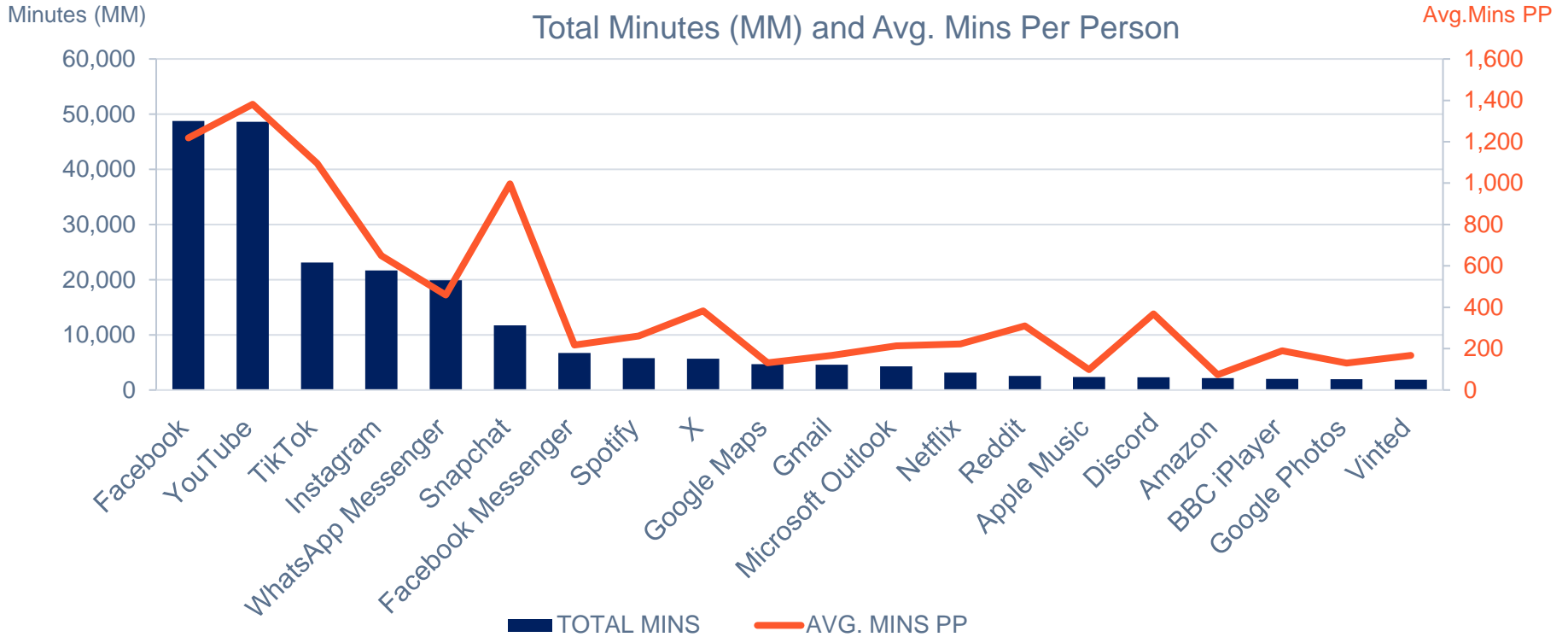
Source: UKOM Ipsos iris Online Audience Measurement Service, Sep 24

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

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, Sep 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'.

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	Facebook	45,115	1135:53
2	YouTube	37,429	1115:41
3	WhatsApp Messenger	20,855	478:39
4	TikTok	20,324	1011:41
5	Instagram	17,957	563:46
6	Snapchat	11,068	936:43
7	Spotify	4,774	235:04
8	Google Maps	4,566	129:30
9	X	4,464	319:17
10	Facebook Messenger	4,455	162:30



Tablet Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	YouTube	14,898	2393:38
2	Facebook	4,443	649:06
3	Facebook Messenger	1,827	440:41
4	Netflix	1,379	435:28
5	BBC iPlayer	1,213	487:04
6	Microsoft Outlook	858	406:54
7	Instagram	765	244:06
8	Gmail	750	190:56
9	YouTube Kids	707	1386:17
10	TikTok	550	367:02



Source: Ipsos, Ipsos iris Online Audience Measurement Service, Sep 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'.



Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

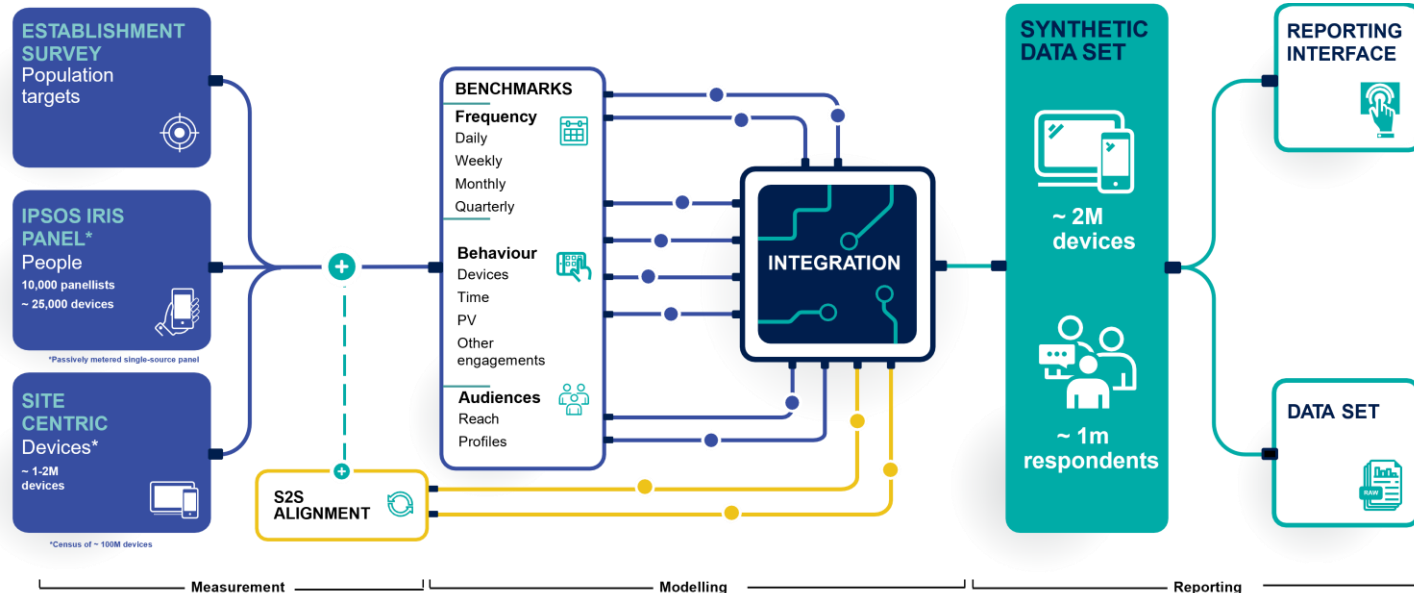
Methodology



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>