

**UKOM**

A stylized, light gray silhouette of the United Kingdom is positioned on the right side of the slide, set against a dark blue background with diagonal geometric patterns.

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## **Online Market Overview**

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**March 2025**

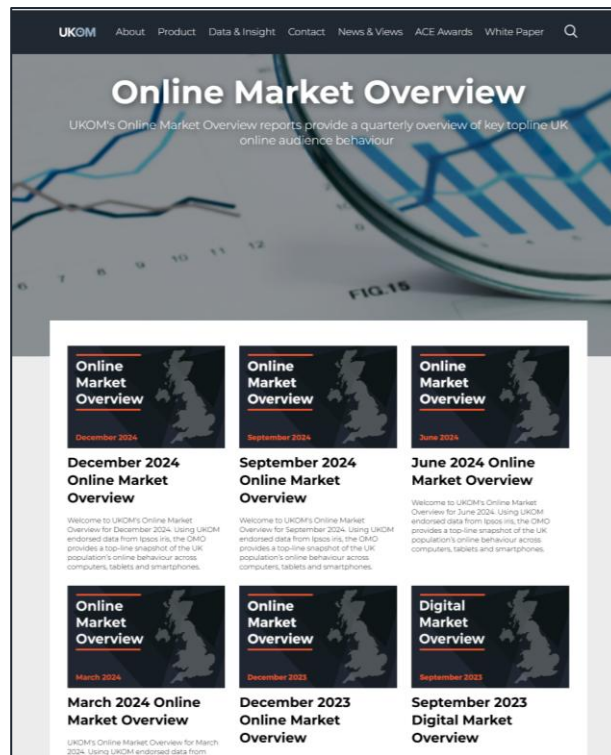
# The UK Online Market Overview March 2025



This Online Market Overview focuses on UK online audience on PC, tablet and smartphone in March 2025

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



- In the news
- The UK online audience
- Time online
- Top organisations and brands
- Top mobile apps
- Key changes: Dec 24-Mar 25

# In the news

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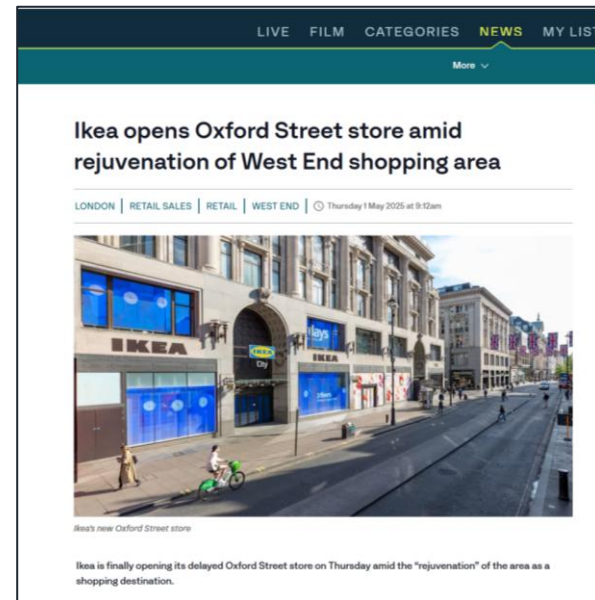


# IKEA tops the 'home retail' online category for Londoners for both audience reach and time online



Top 5 Online Home & Garden Retailers among Londoners

MEDIA	AUDIENCE (000s)	REACH	AUDIENCE AFFINITY INDEX	AVG. MINS PP	SHARE OF CATEGORY MINUTES
<b>Homes &amp; Garden Category</b>	<b>3455</b>	<b>47.2%</b>	<b>86</b>	<b>16:14</b>	<b>100%</b>
IKEA	1056	14.4%	113	15:06	28.4%
B&Q	989	13.5%	72	04:16	7.5%
Dunelm	874	11.9%	85	08:06	12.6%
Screwfix	611	8.4%	63	07:52	8.6%
Wayfair	474	6.5%	96	07:03	6.0%



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

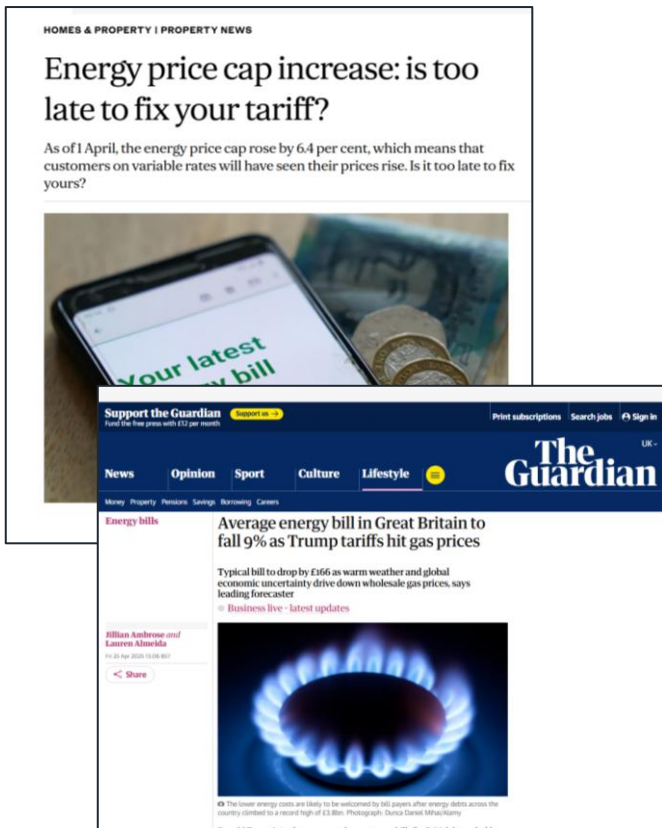
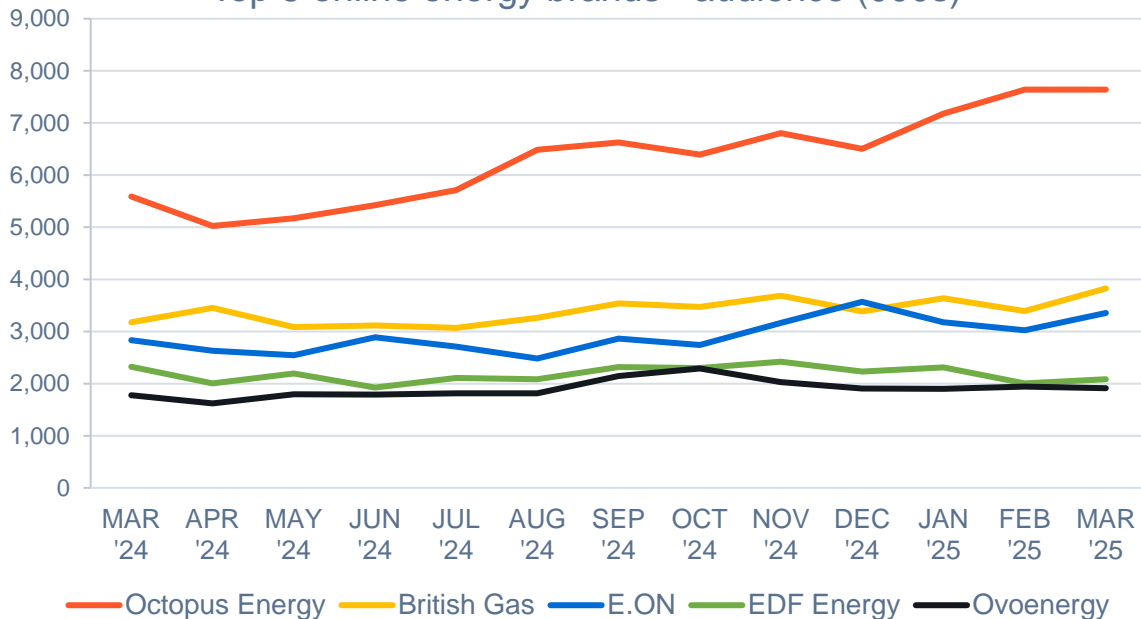
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month AND live in London.

# Octopus' online audience is double British Gas'

Octopus energy continues its rapid growth in Q1 outperforming competitors. It has the largest online audience and is also the largest supplier of UK energy according to gov.uk



Top 5 online energy brands - audience (000s)



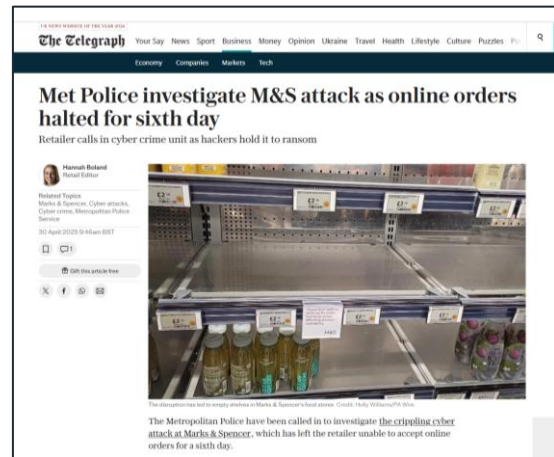
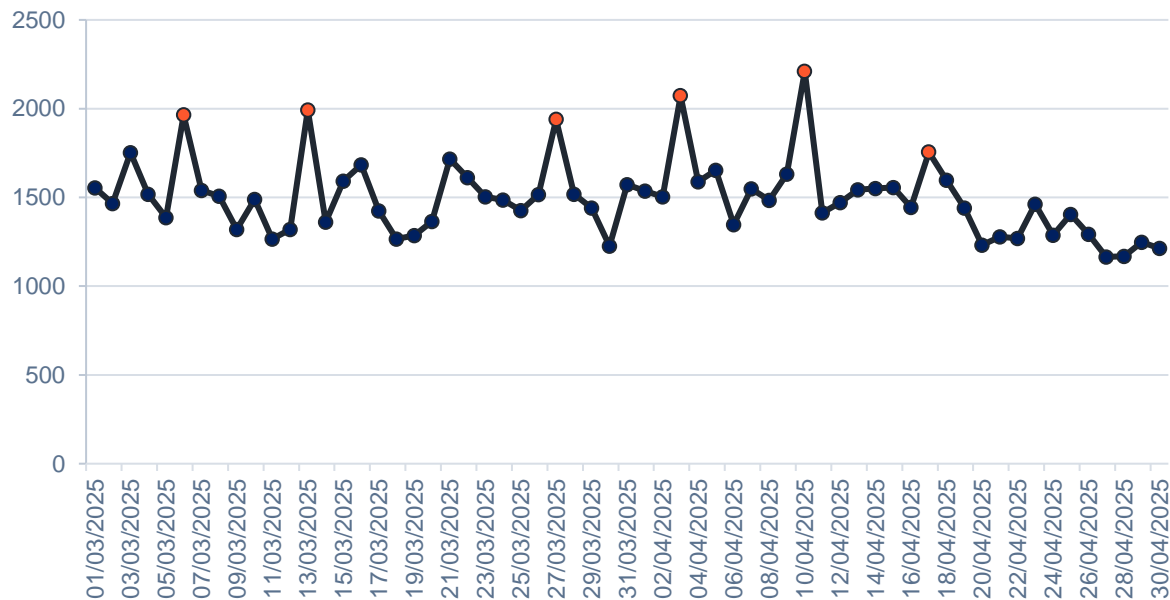
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 24 – Mar 25  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.


# M&S mobile app audience by day: Mar-Apr 2025



App usage tends to peak on Thursdays. The cyber-attack impacted audiences at the end of April

M&S app audience (000s) by day: Mar-Apr 25



	000s
Average Daily Audience (000s) Mar-Apr 2025	1498
Average Daily Audience Thursdays 	1823
Average Daily Audience 24-30 <sup>th</sup> Apr	1254



Source: UKOM Ipsos iris Online Audience Measurement Service, Daily Dashboard Mar-Apr 2025  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.



# Which other online fashion retailers do M&S online users visit?

More M&S customers shop at Next online but Boden & Monsoon have higher audience affinity

		Marks & Spencer (14,902)	
HIGH REACH BRANDS	AUDIENCE (000s)	AUDIENCE DUPLICATION (000s)	AUDIENCE AFFINITY INDEX
Next	9,089	5,391	200
Shein	11,983	4,306	121
ASOS	6,061	3,012	168
H&M	3,563	2,243	212
New Look	2,890	1,901	222
Sports Direct	4,502	1,804	135
Very	4,350	1,786	138
Matalan	3,076	1,783	195
Primark	2,551	1,383	183
JD Sports	3,581	1,369	129

		Marks & Spencer (14,902)	
HIGH INDEX BRANDS	AUDIENCE (000s)	AUDIENCE DUPLICATION (000s)	AUDIENCE AFFINITY INDEX
Boden	630	503	269
Monsoon	663	520	265
Phase Eight	438	340	261
Peacocks	477	364	257
White Stuff	642	486	255
Nobody's Child	515	390	255
Roman Originals	944	700	250
FatFace	581	427	248
River Island	1,262	927	248
New Look	2,890	1,901	222



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 2025  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

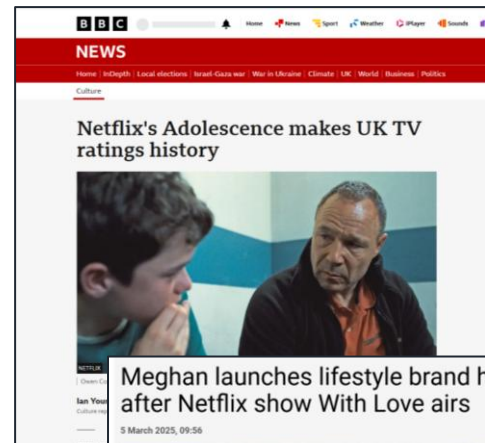
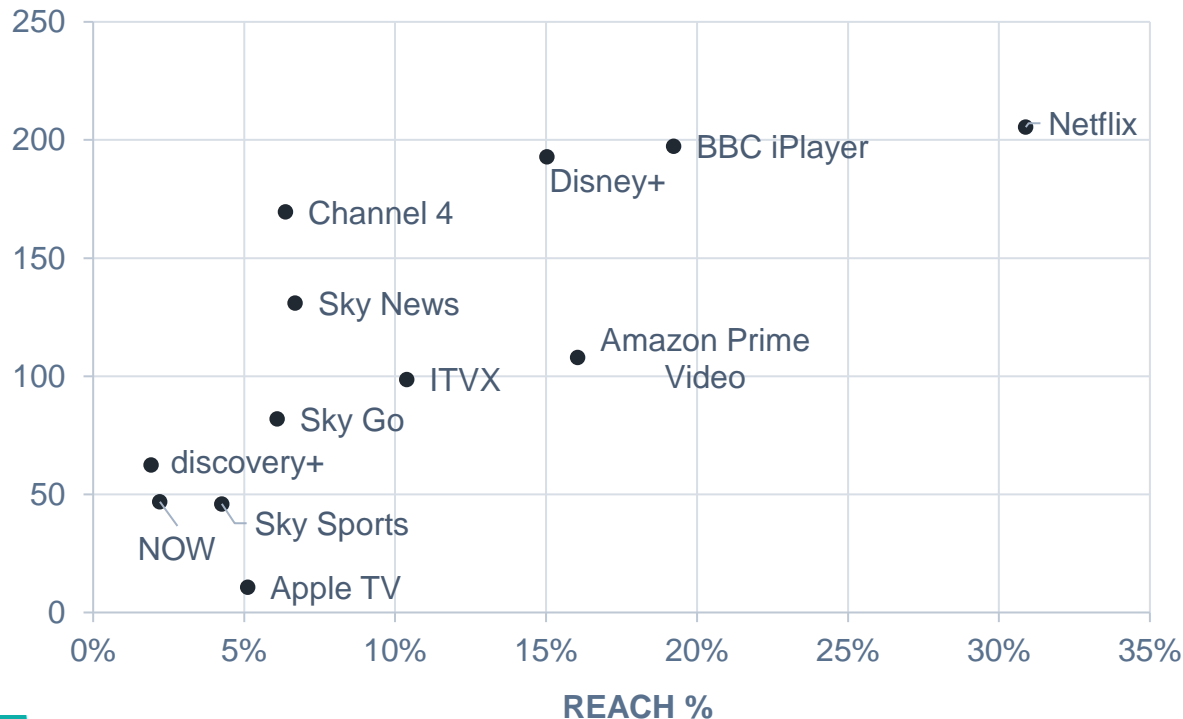


# Online TV\*: Mobile app reach and engagement

The Netflix app (on smartphones and tablets) attracted the highest reach and time online in March



AVG. MINS PP

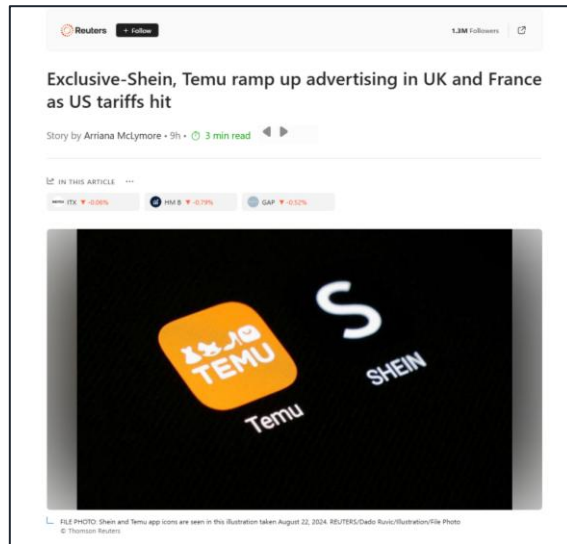
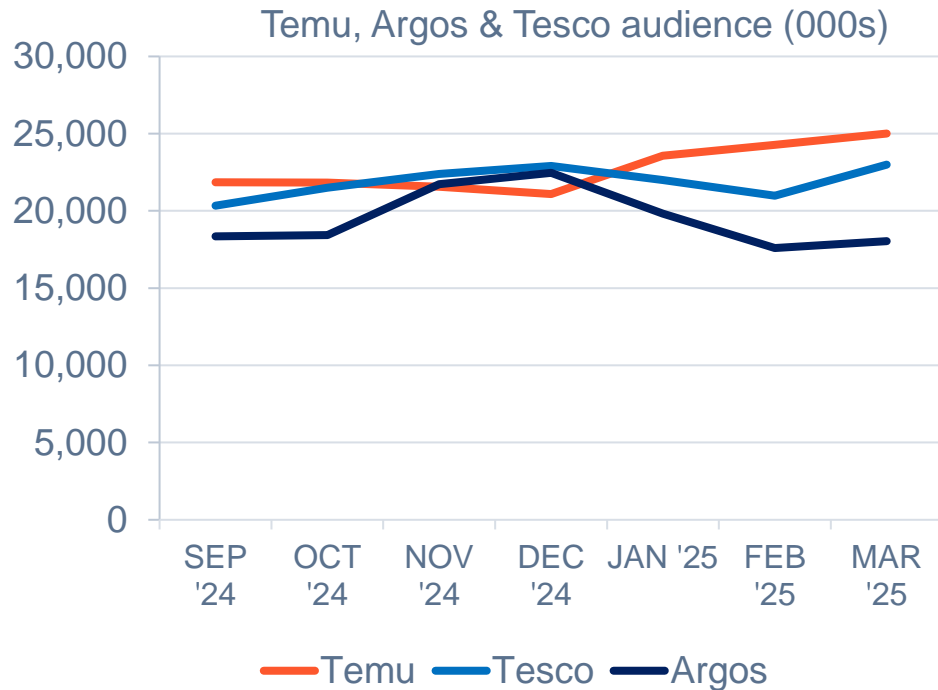


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25. Online TV\* includes Live TV, AVOD & BVOD, SVOD, TVOD, General Online TV but excludes VSPs  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

# Temu's online audience is now bigger than Tesco's



Before any UK advertising ramp up due to US tariffs, Temu grew in Q1 and now has a bigger online audience than top retail brands Tesco and Argos



	AUDIENCE REACH (%)			
	DEC '24	MAR '25	Change (%)	Change (abs)
Tesco	45.7	45.8	0.1%	0.04
Temu	42.1	49.8	18.2%	7.68
Argos	44.8	35.9	-19.9%	-8.93

Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 24 – Apr 25  
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

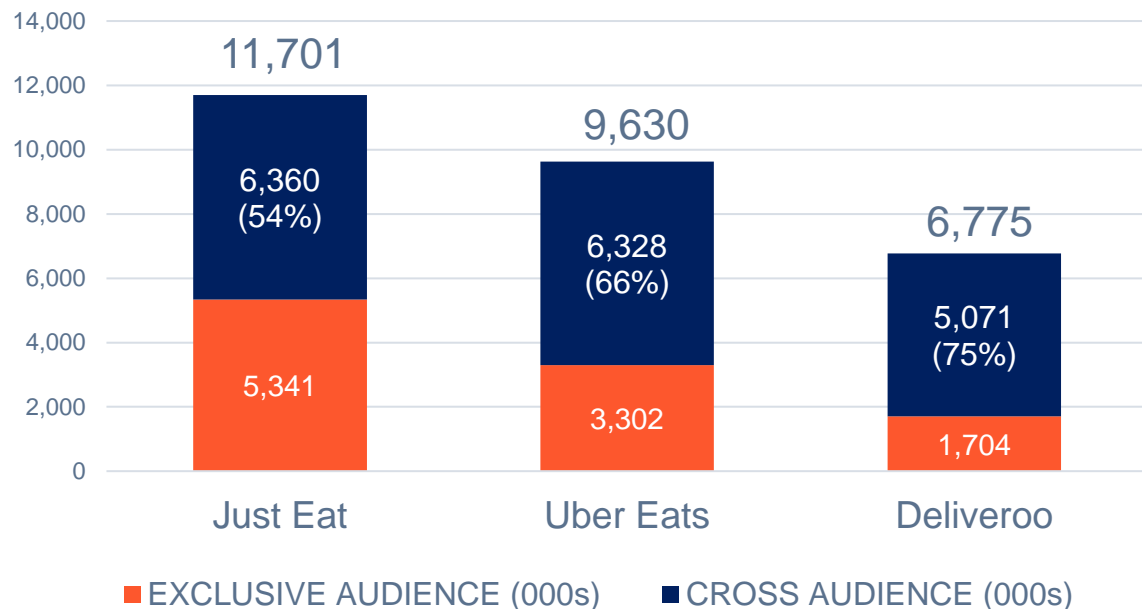


# Reach & audience duplication of fast food delivery services



⅓ of Deliveroo's audience also visited Just Eat or Uber Eats

Audience of Top 3 Delivery Services



18.1 million or 36% of the UK internet population visited Just Eat, Uber Eats or Deliveroo in March

## Deliveroo shares surge 17% as £2.7bn takeover looms

The meal delivery platform's founder stands to make more than £170m if the deal offered by US rival DoorDash goes through.



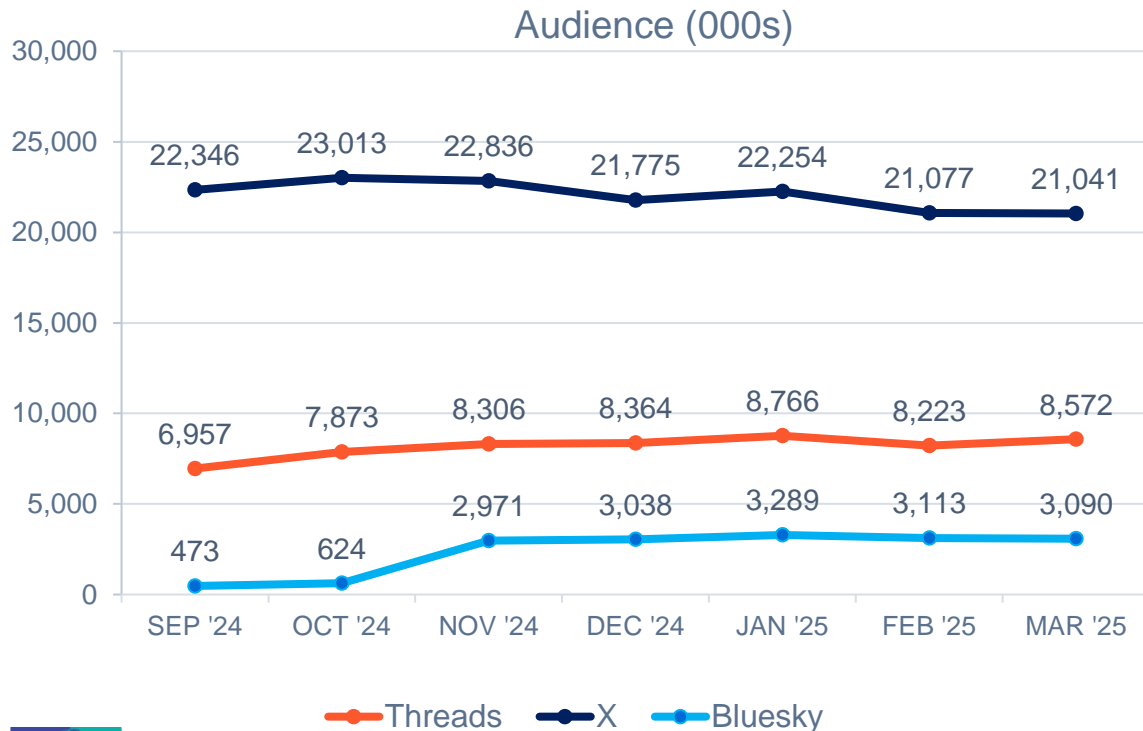
James Sillars  
Business and economics reporter @SkyNewsBz




© Monday 28 April 2025 09:33 UK



Pic: iStock

# X may be losing audience but is still has higher reach and engagement than competitors

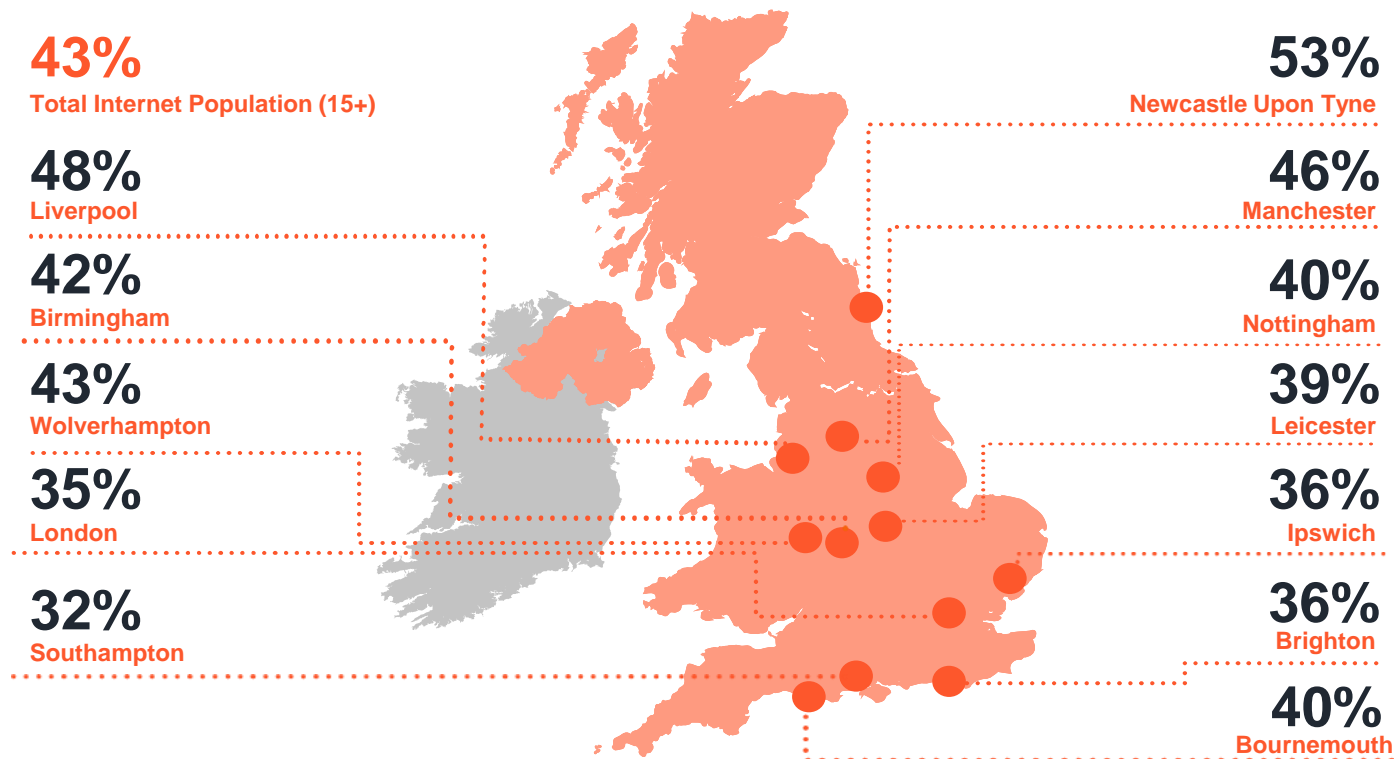


	AUDIENCE REACH (%)		AVG. MINS PP	
	DEC '24	MAR '25	DEC '24	MAR '25
	43.5	41.9	229:23	209:29
	16.7	17.1	119:37	113:15
	6.1	6.2	90:59	101:49

# Online football category audience - reach (%) by city



Among cities with a Premier League club, Newcastle & Liverpool topped the table for the highest % visiting the football category online in March, while London and Southampton were bottom of the league



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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



# The UK online audience

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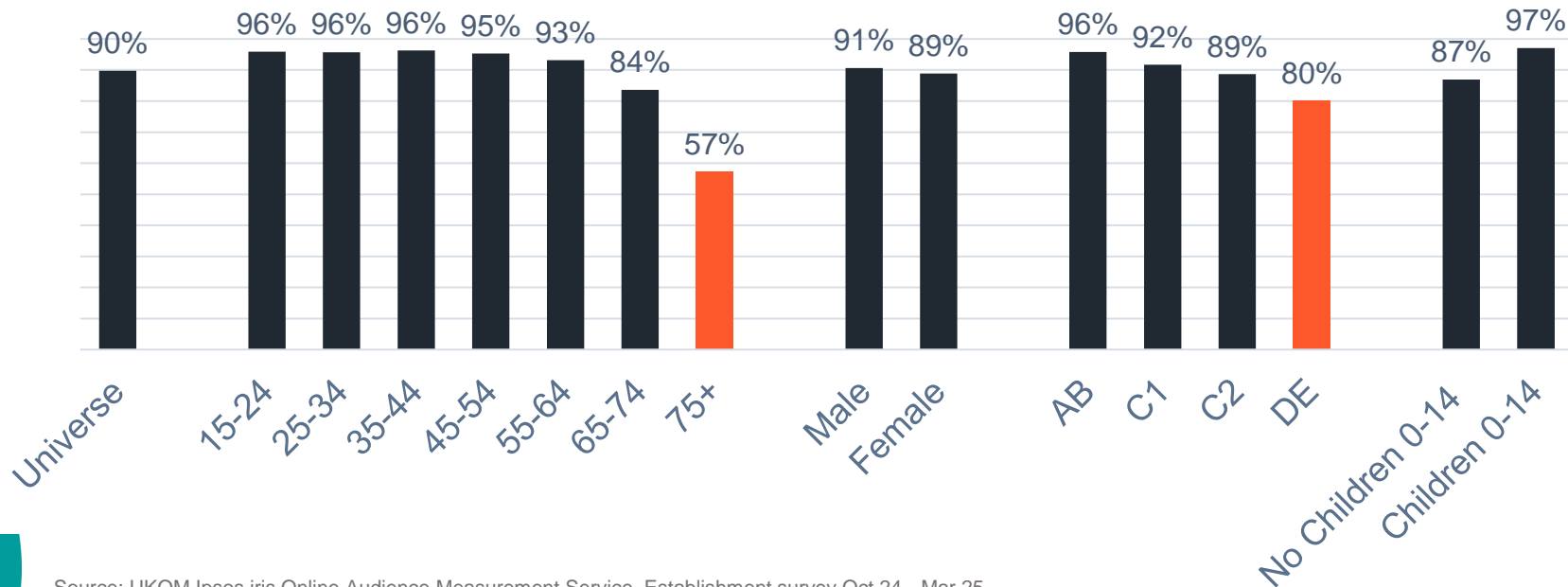


# Internet penetration by demographics – Q1 25

Internet penetration is lower among those aged 75+ and social grades DE



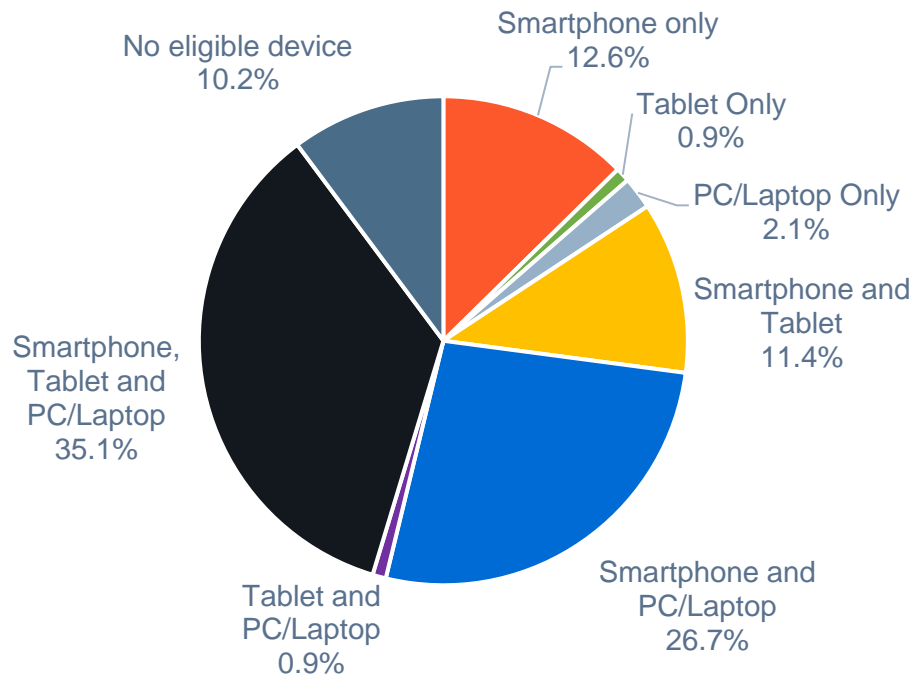
% of UK population who use the internet



# Device usage by UK population – Q1 25



89.8% of the UK population use a smartphone, tablet or PC/laptop. 10.2% do not use any – that is 5.7m people

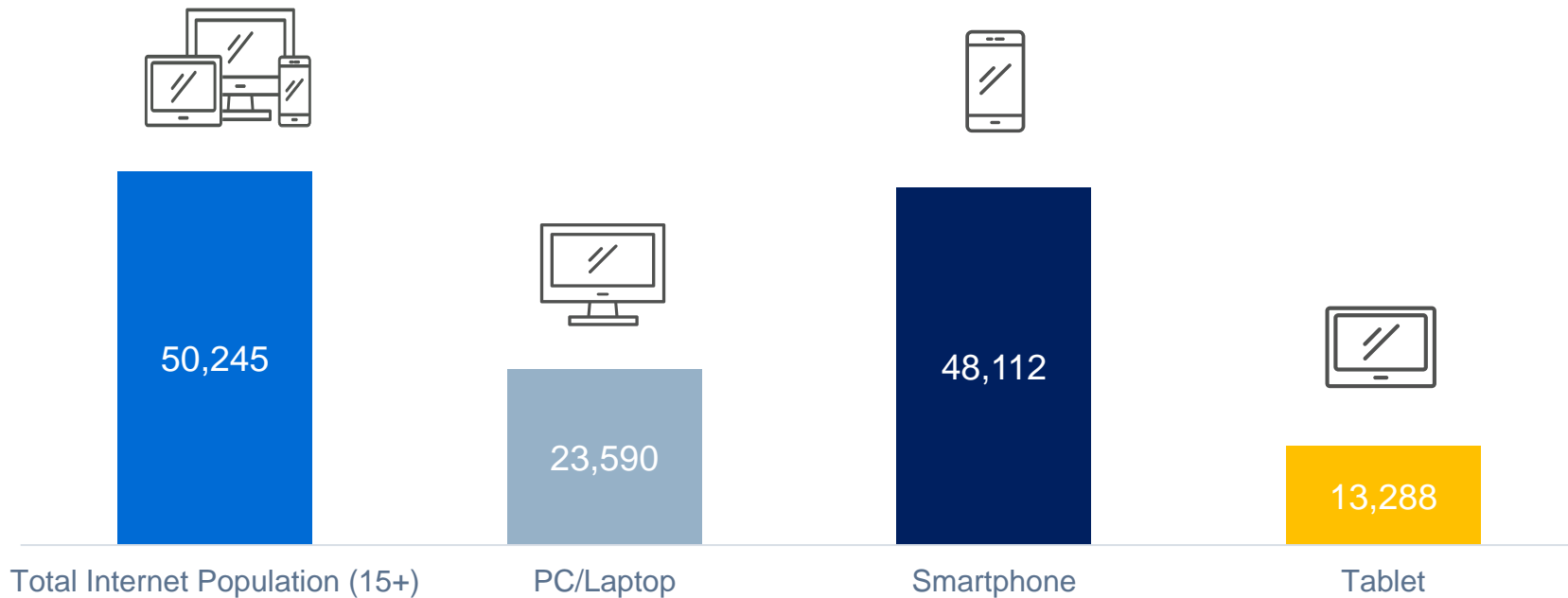


74% of the UK population are multi-device users, with over a third using all 3 types of device



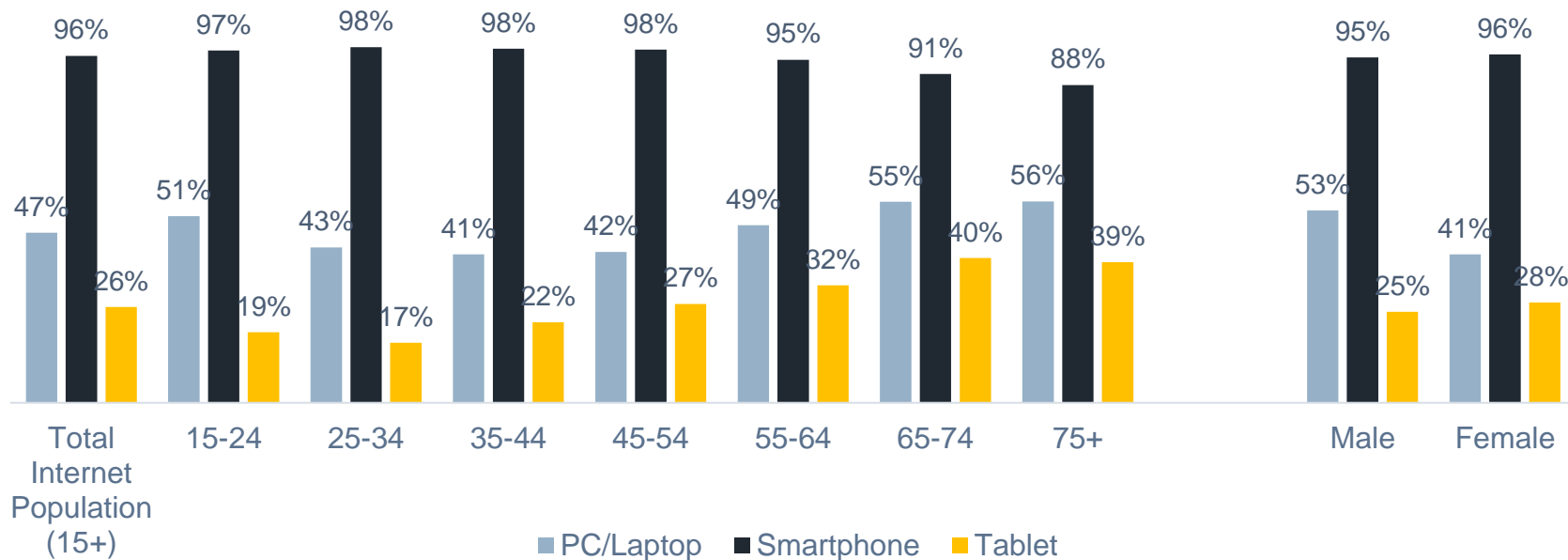
# Online audience by devices used (000s)

Total online 15+ audience surpasses 50 million



# 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



# Time online

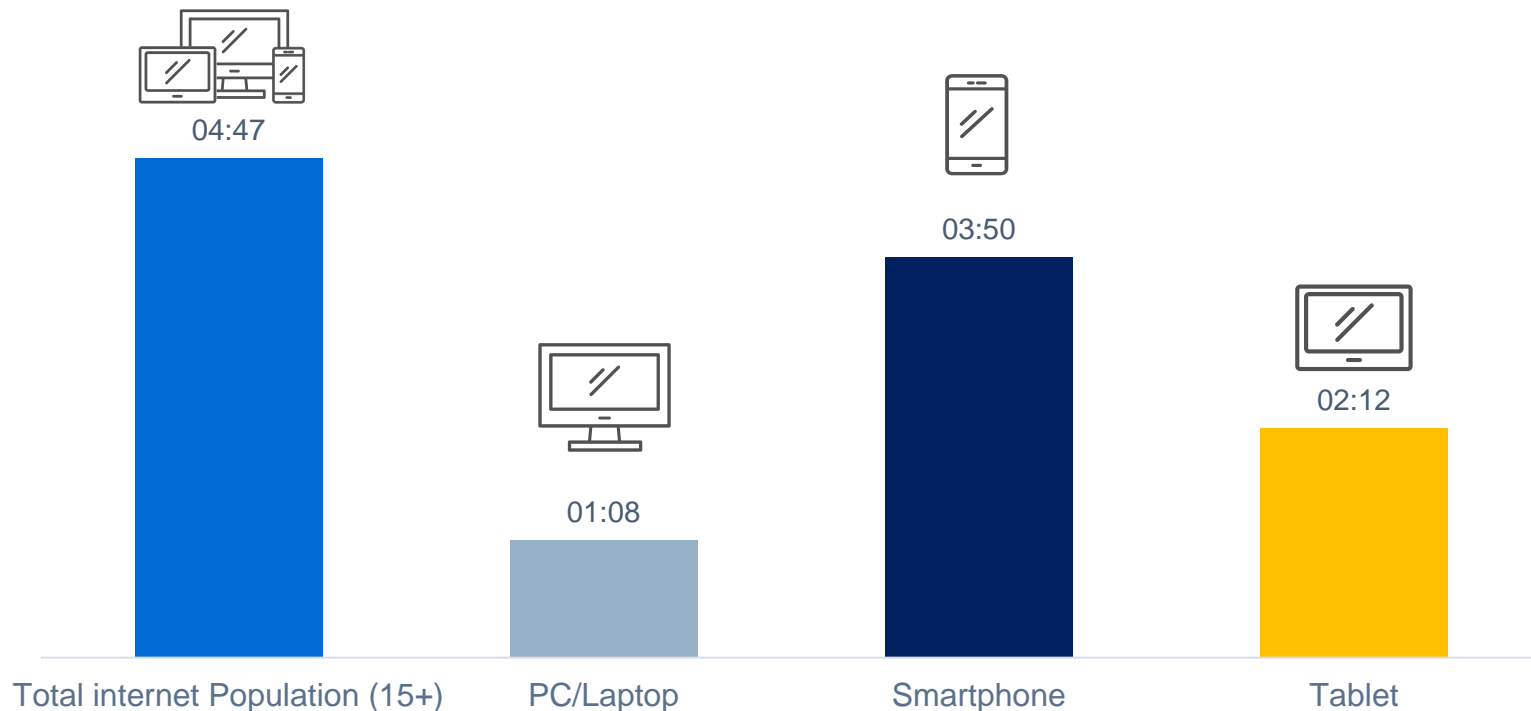
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# Average time spent online per day by device (hh:mm)



The UK internet population's average daily time online in March was 4hrs 47 minutes



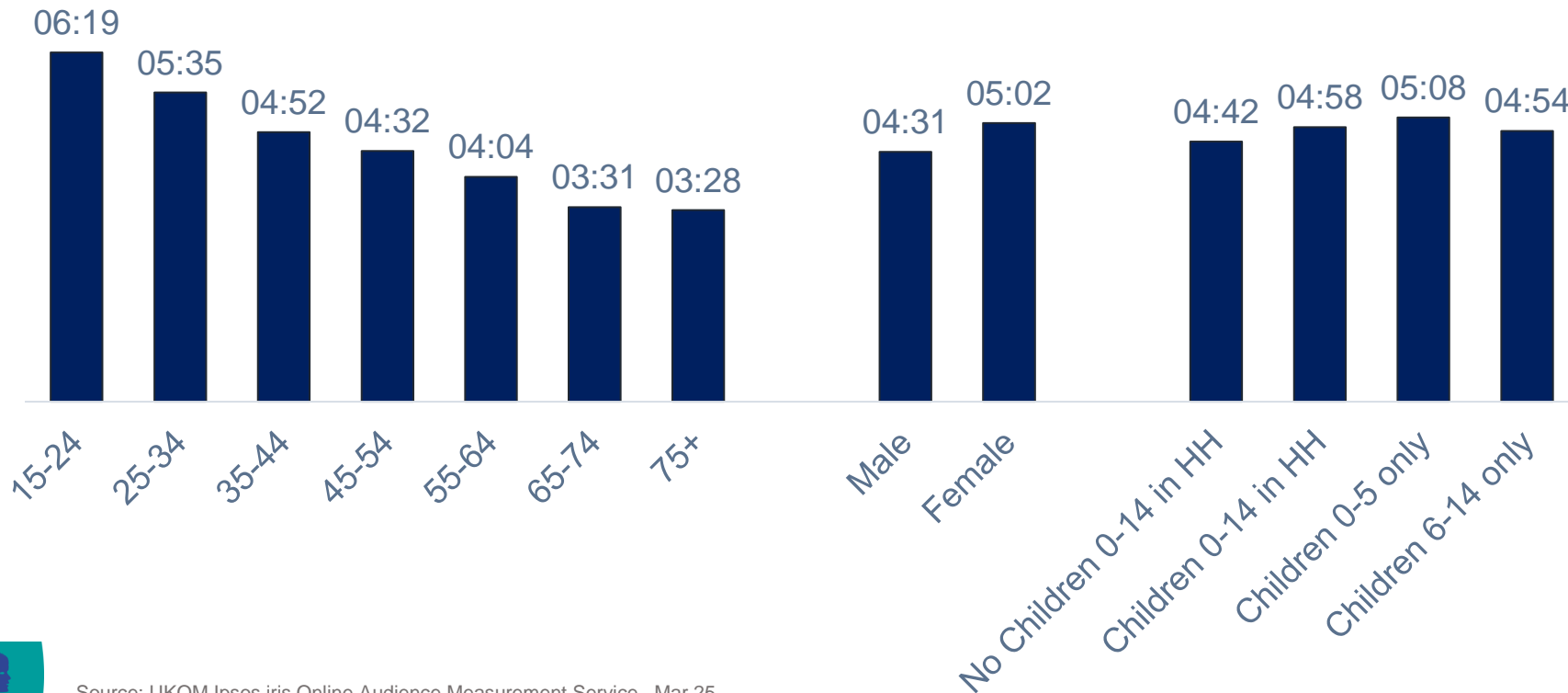
Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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



15-24s now spend on average more than 6 hrs online each day

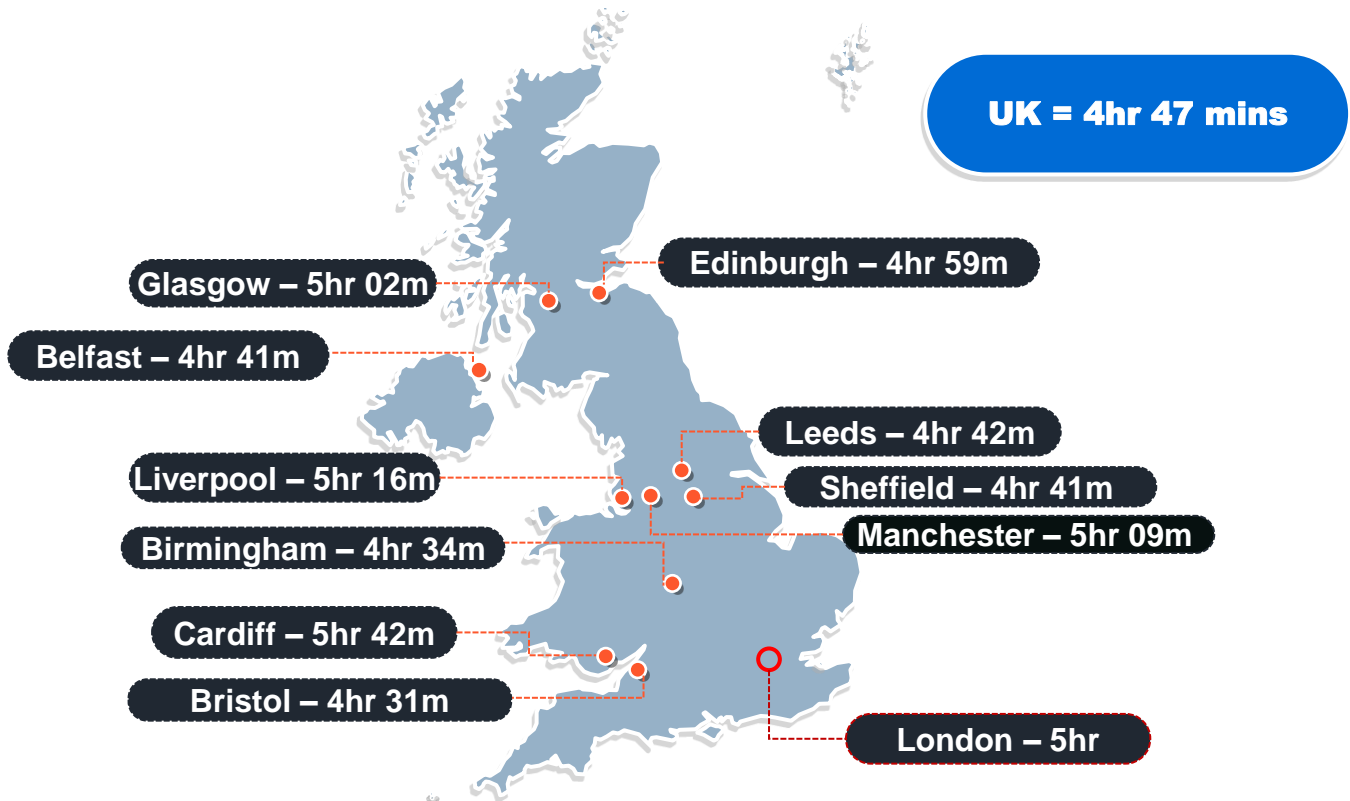


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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

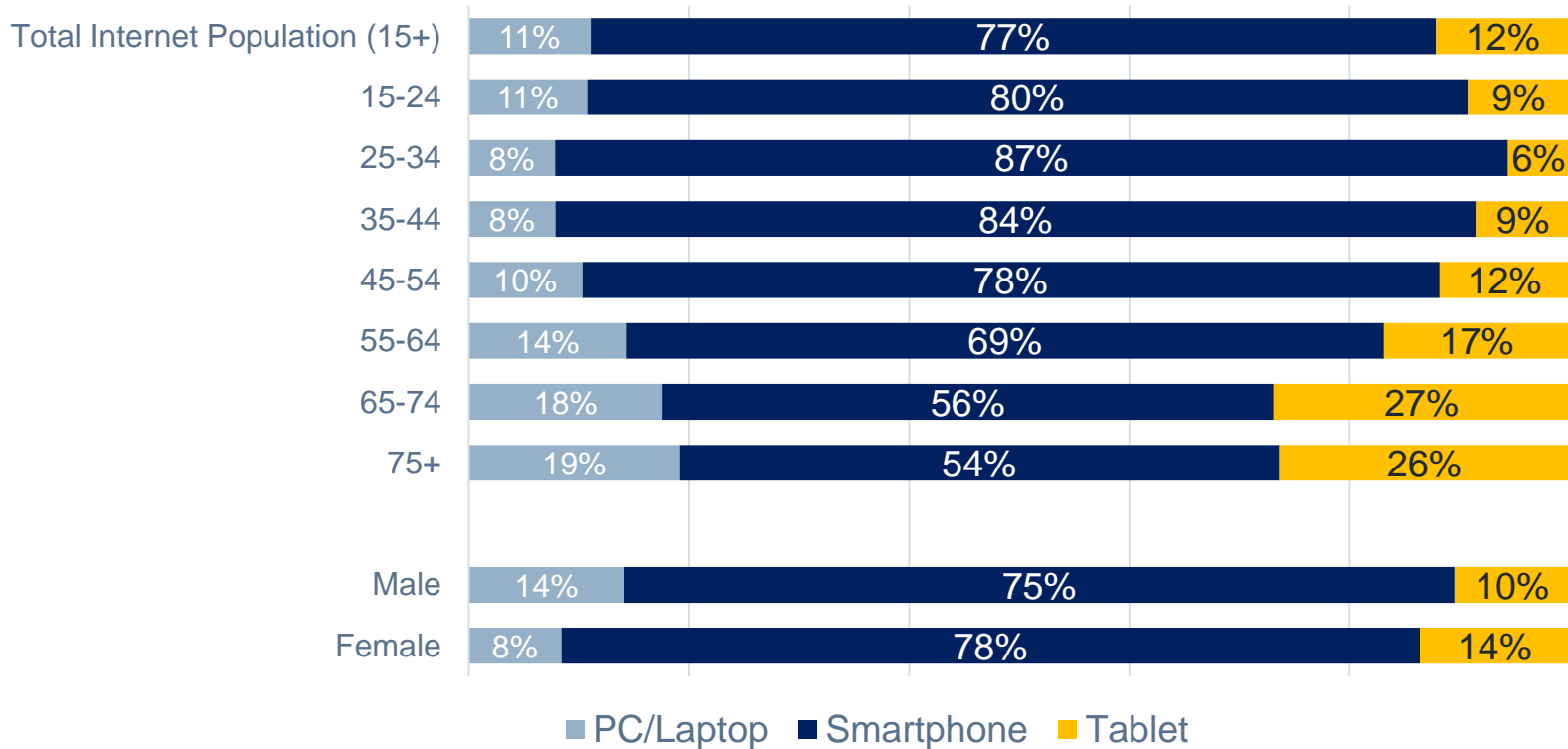
# Average time online per day by city (hh:mm)

Of the major UK cities, residents of Cardiff spent most time online in March



# Device share of minutes by age and gender

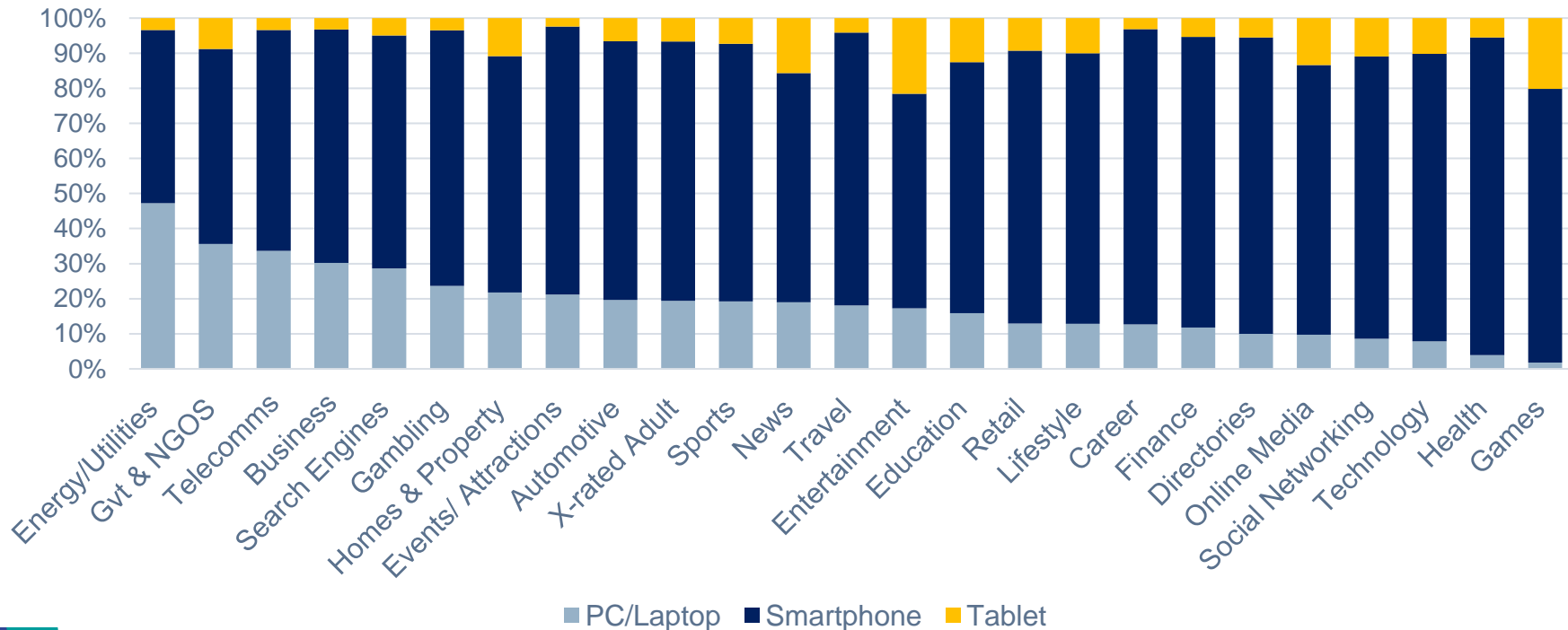
Tablet share is higher among older people. Tablet share is higher than Pc/laptops



# Share of minutes (%) by device by category



There are now NO major categories where PCs account for the majority of minutes. Tablets have their highest share for entertainment and gaming



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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'



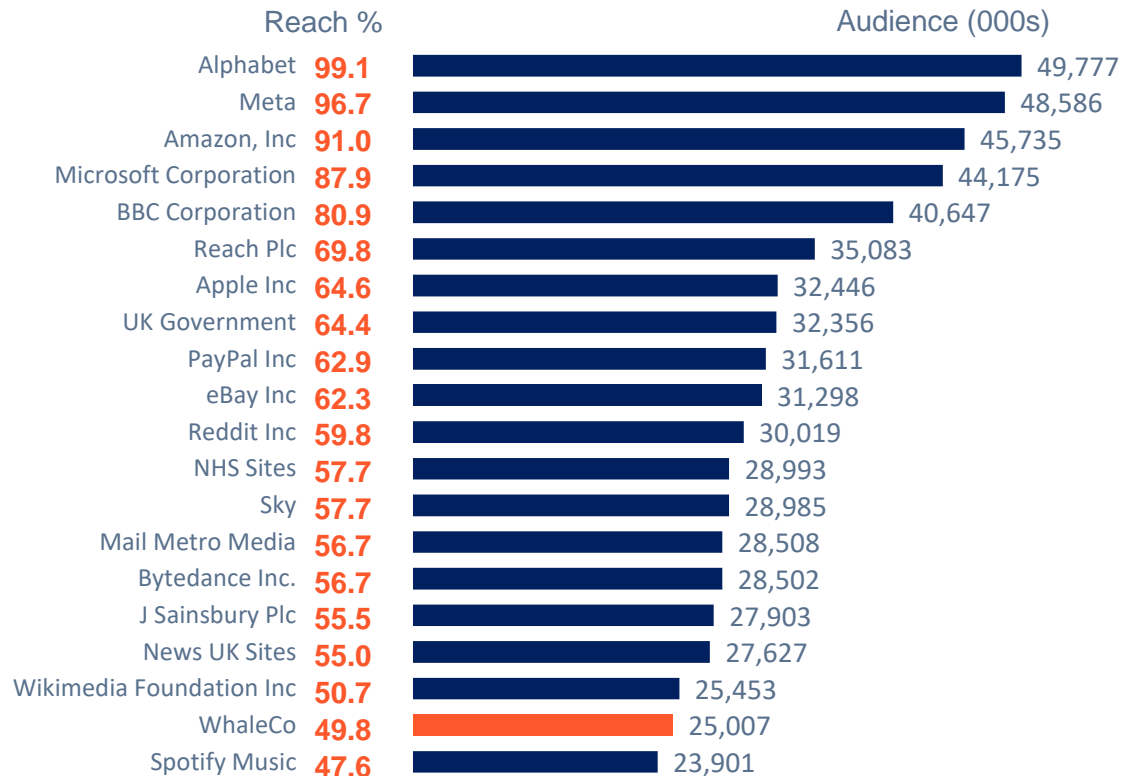
# Top organisations and brands

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# Top 20 organisations by audience

Whaleco re-enters the top 20 after ongoing growth from Temu – now used by ½ the online population

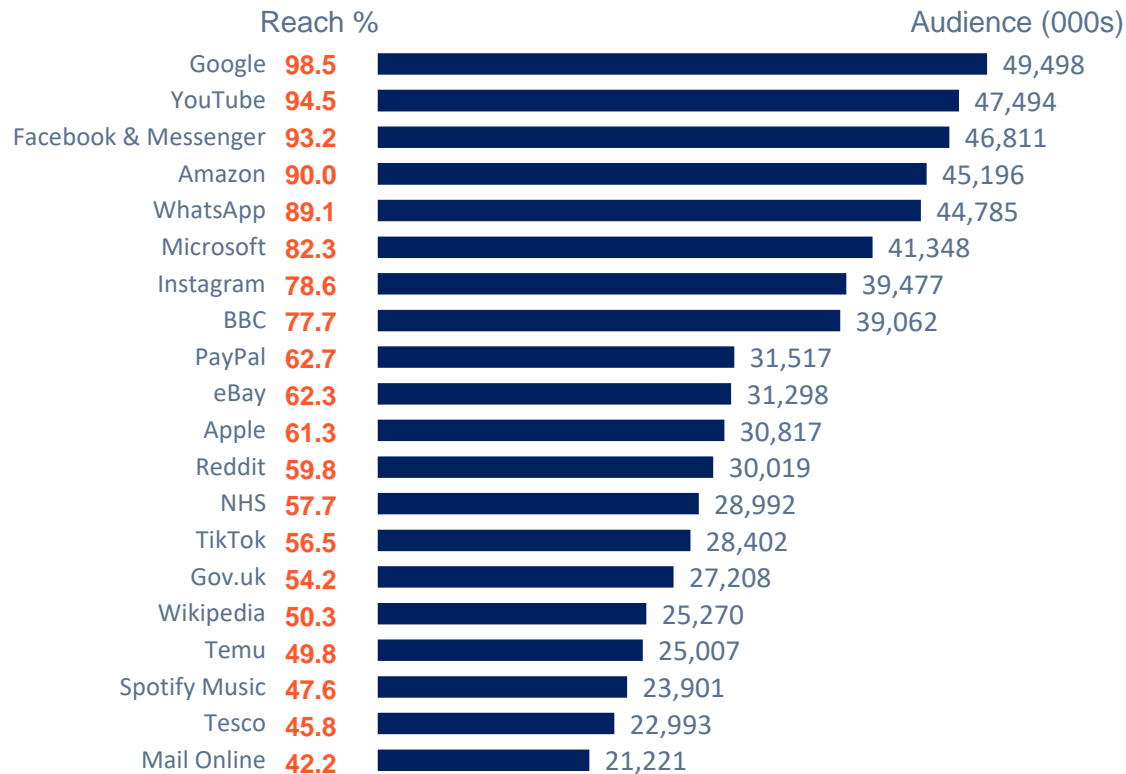


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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

# Top 20 online brands by audience

Mail Online and Temu re-enter the top 20, replacing X and Argos



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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

# Top 20 brands by time spent

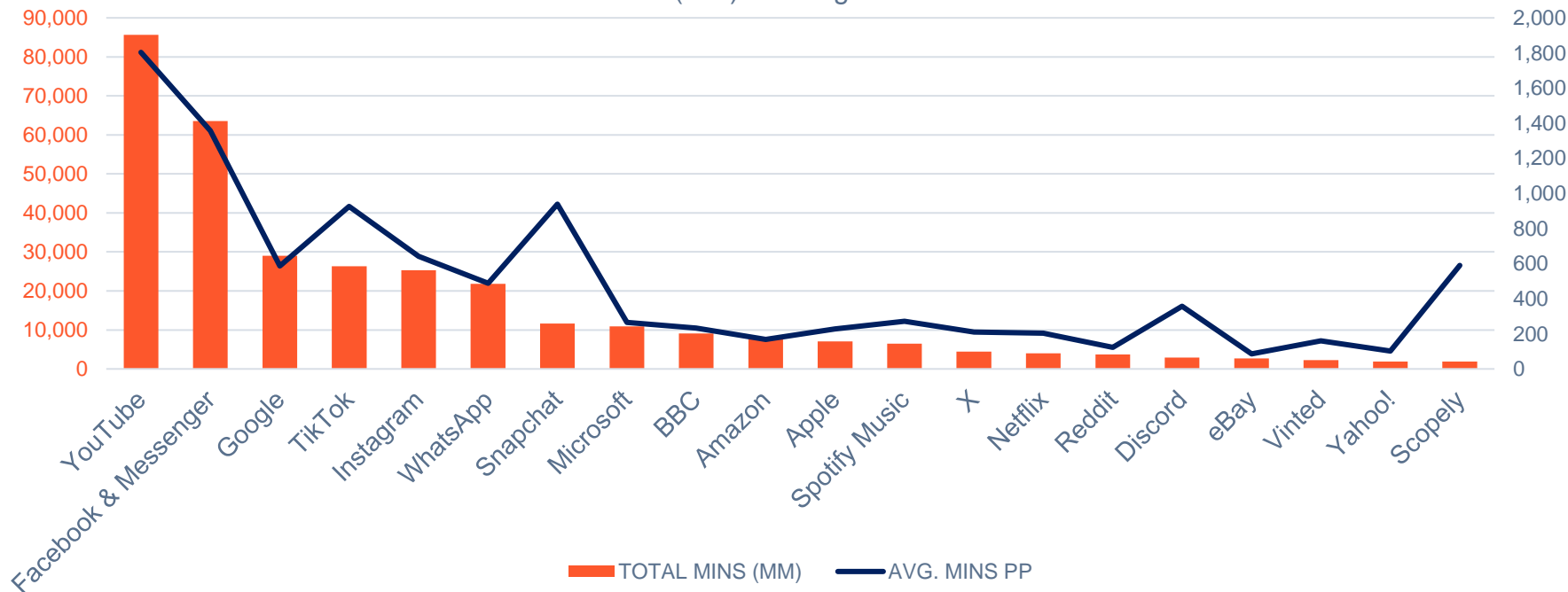


Social media brands dominate the top 10 for time online, driven by high average minutes per person.

Minutes (MM)

Total Minutes (MM) and Avg. Mins Per Person

Avg.Mins PP



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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

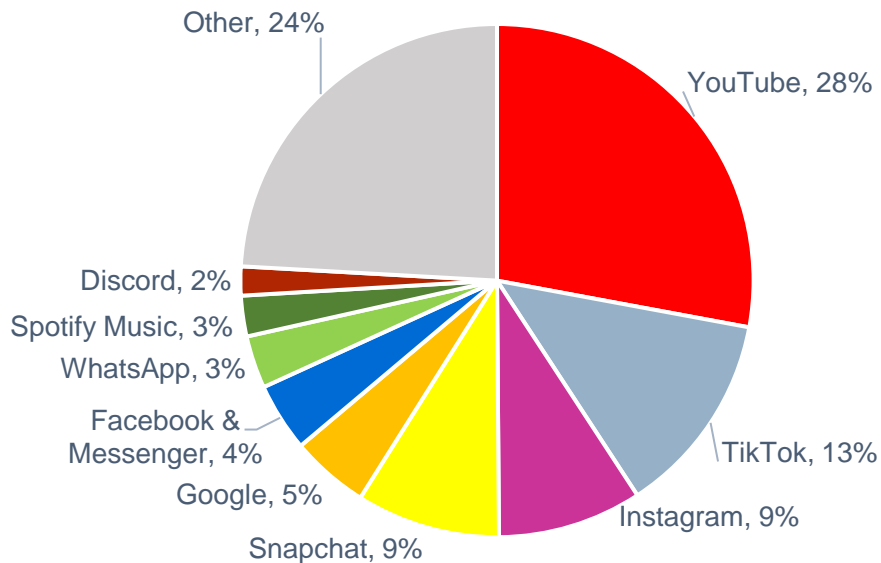
NB Duration (Total Mins (MM) & Avg. Mins PP) not measured for sites or apps running in device background/'out of focus'.

# Brand share of minutes by age group: 15-24 v 55+

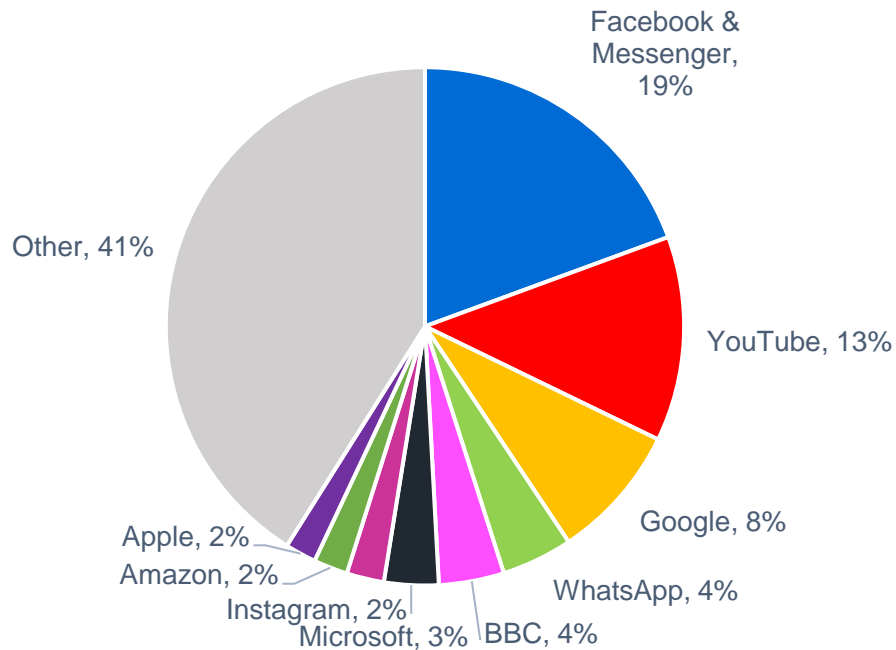
Top brands & SOM differs by age. YT and TikTok account for 41% of time spent by 15-24s



## 15-24



## 55+



Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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



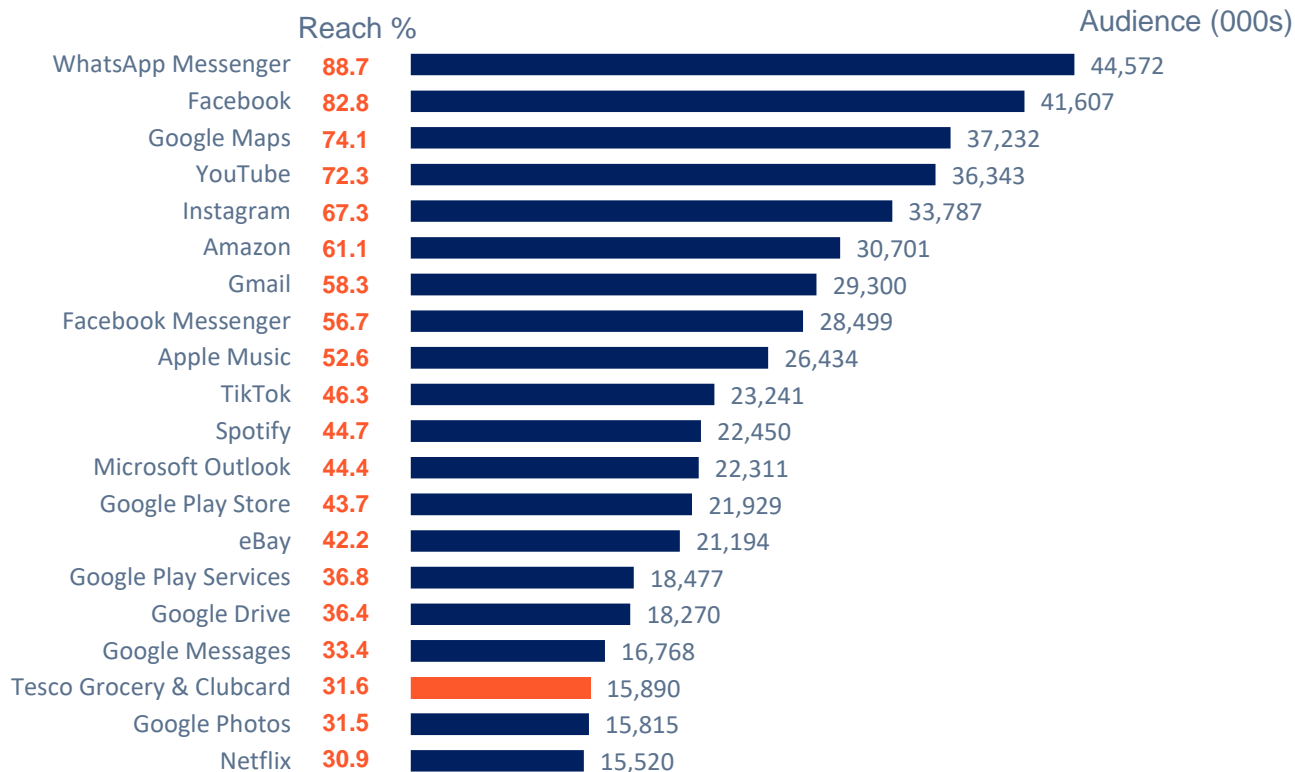
# Top mobile apps

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# Top 20 mobile apps by audience

Tesco is the only British owned mobile app in the top 20

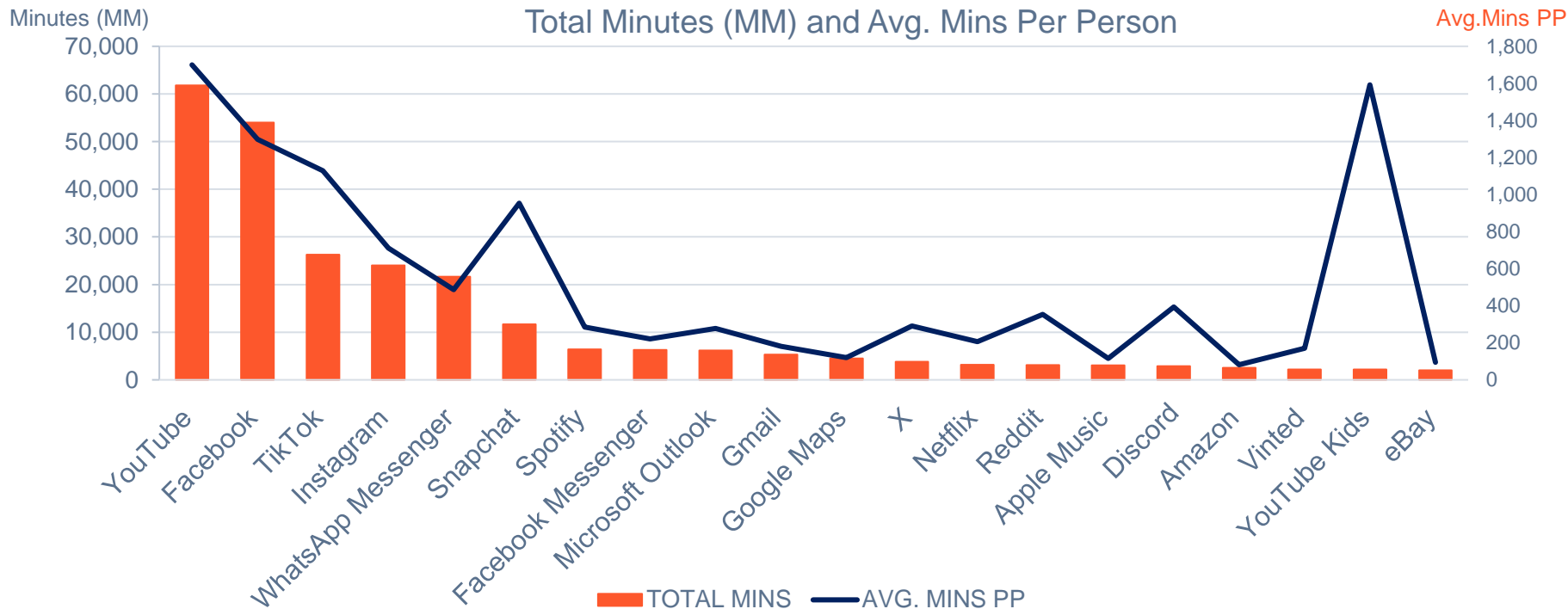


Source: UKOM Ipsos iris Online Audience Measurement Service, Mar 25

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, Mar 25

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'.





# Key changes: Dec 24 – Mar 25

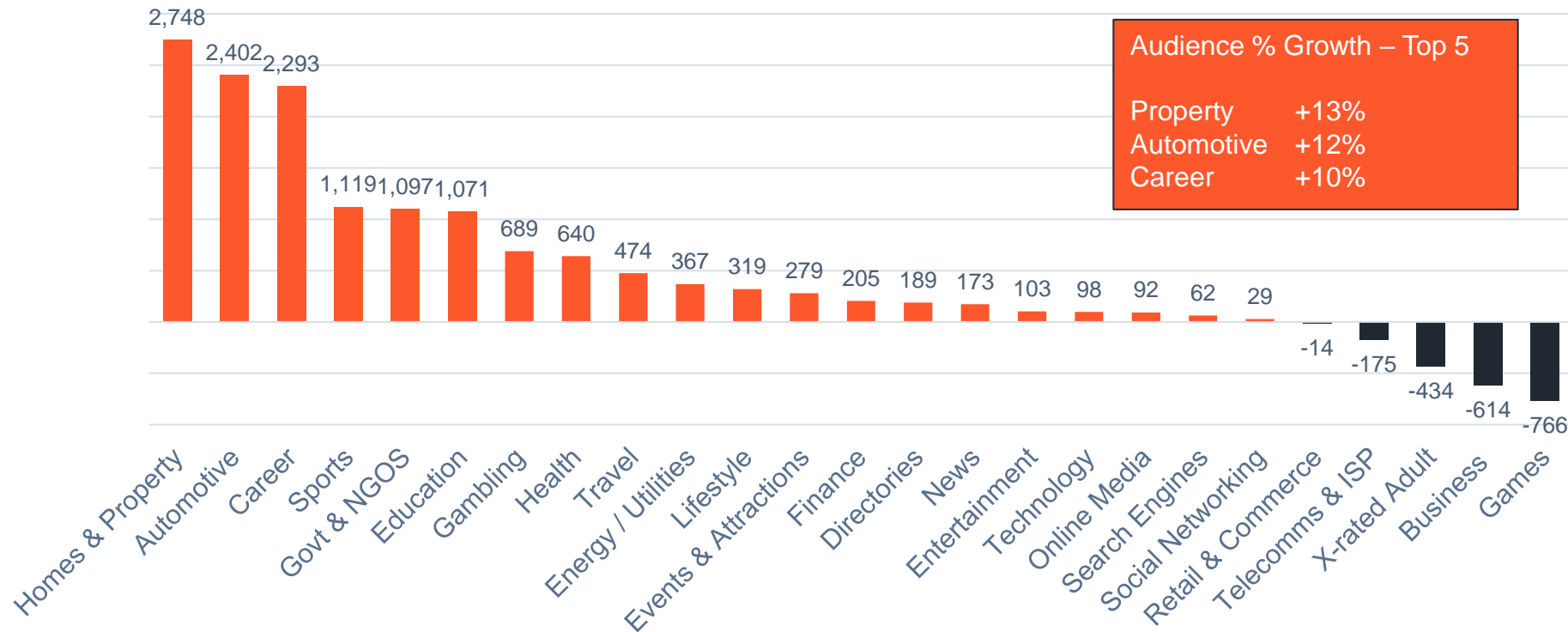
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# Tier 1 Category audience change (000s): Dec 24 – Mar 25



People start thinking about moving house, changing career or getting a new car at the start of the year



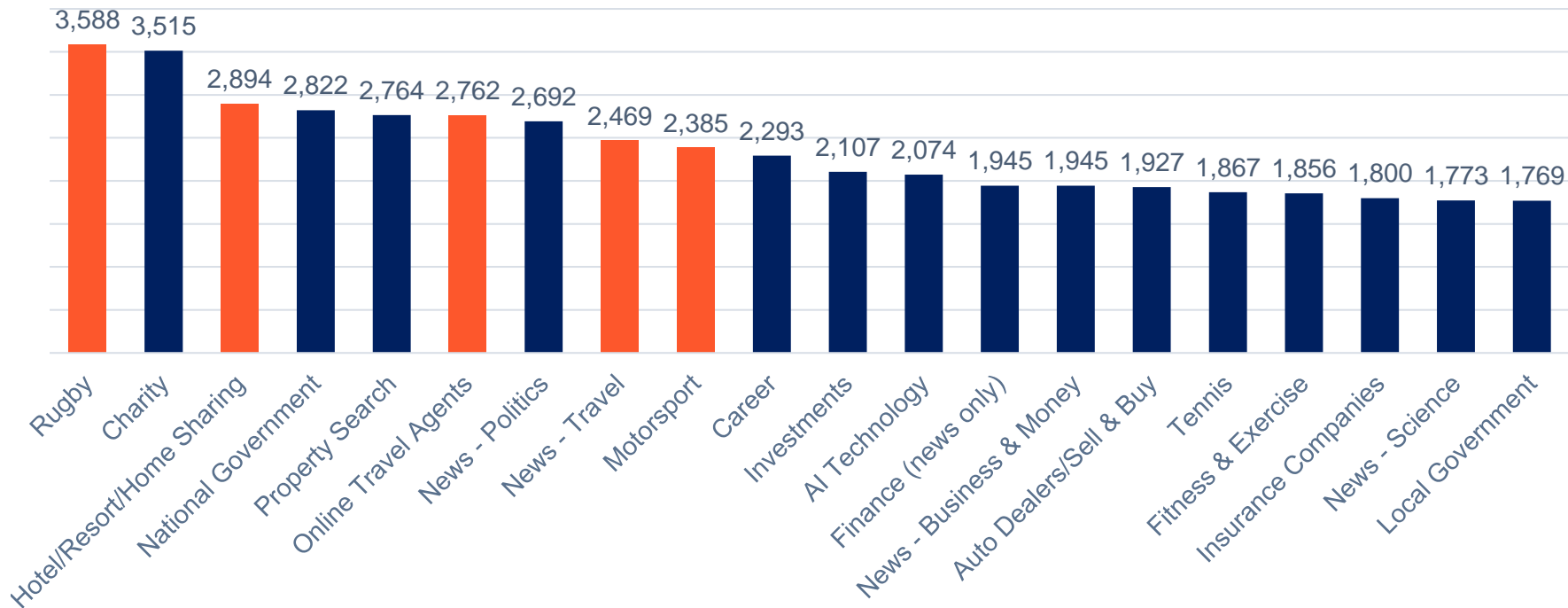
Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 24 and Mar 25

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

# Tier 2 Category audience gains (000s): Dec 24 – Mar 25



Rugby and motorsport were in the top 10 for audience gains due to the Six Nations and F1. Travel categories also added visitors as people turn their attention to holidays at the start of the year



Source: UKOM Ipsos iris Online Audience Measurement Service, Dec 24 and Mar 25

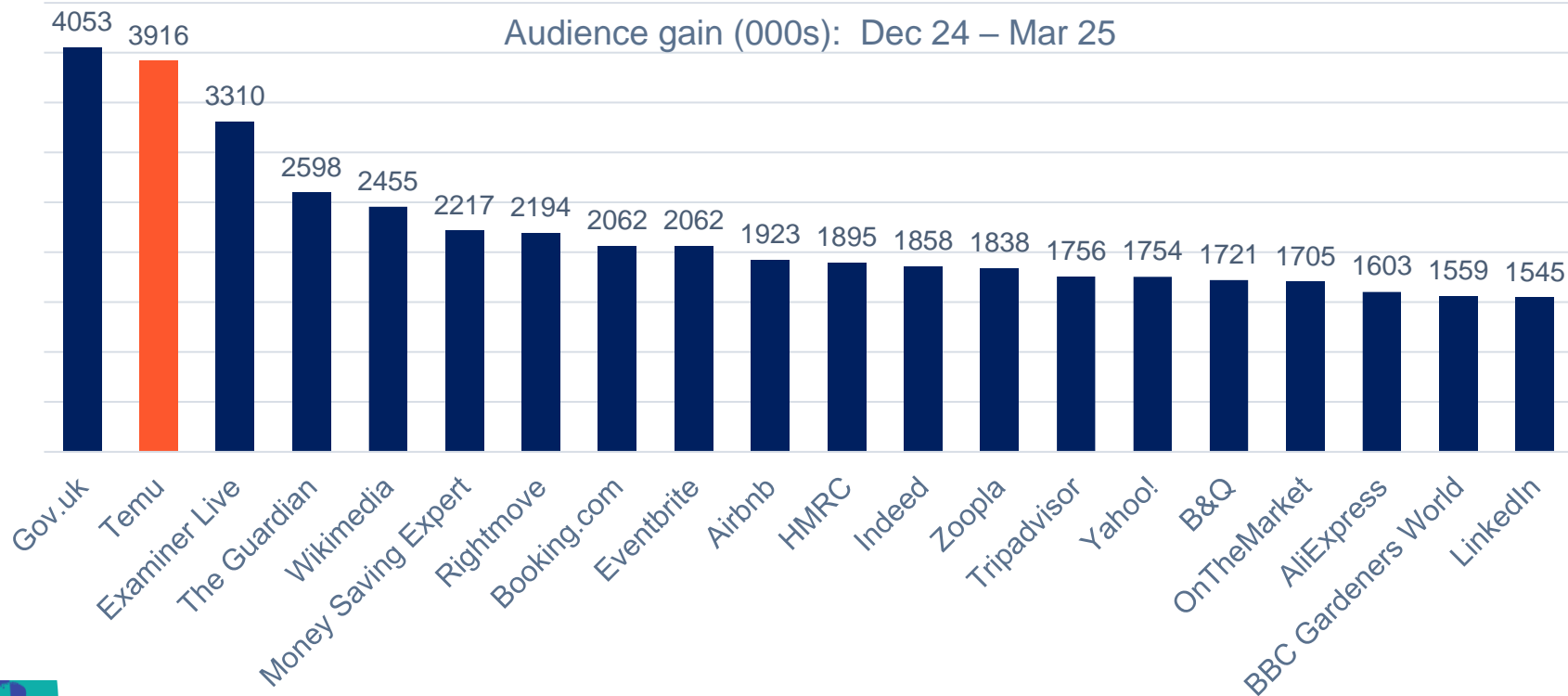
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

# Brands adding most audience : Dec 24 – Mar 25



The end of the tax year contributed to uplifts for Gov.uk. Temu's growth continues - audience increased by 3.9m. Half (49.8%) the population now use the Chinese discount retailer

Audience gain (000s): Dec 24 – Mar 25



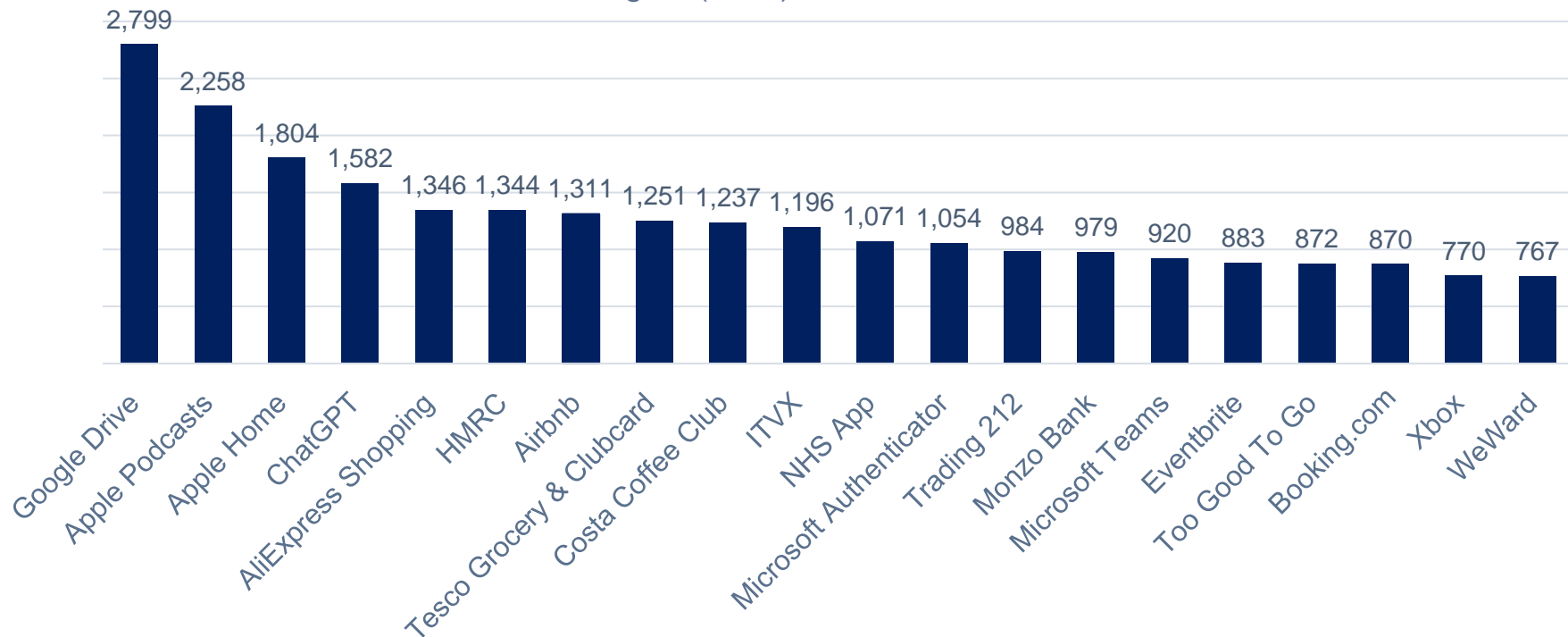
Source: Ipsos iris Online Audience Measurement Service, Dec 24 – Mar 25

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

# Mobile apps adding most audience : Dec 24 – Mar 25



Audience gain (000s): Dec 24 – Mar 25



Source: Ipsos iris Online Audience Measurement Service, Dec 24-Mar 25

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



# **Questions?**

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Find out more at:

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

Email us at:

[insights@ukom.uk.net](mailto:insights@ukom.uk.net)

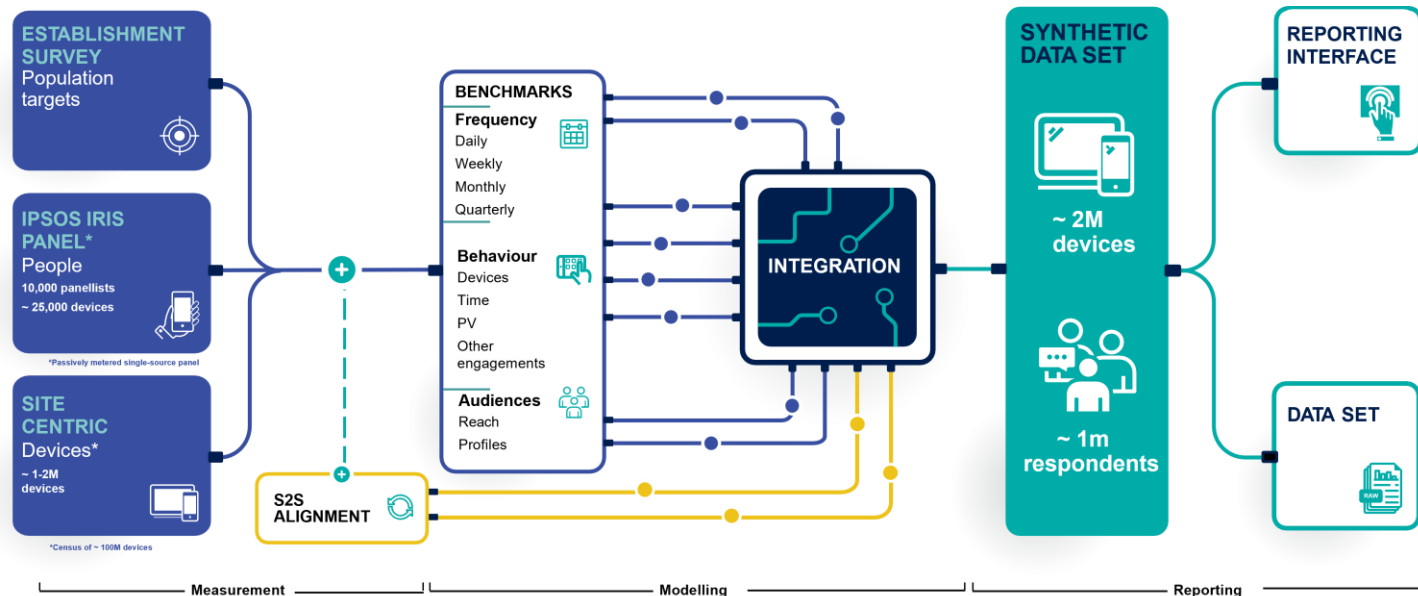
# Methodology



## 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](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/](http://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>