

UKOM

A stylized, light gray silhouette of the United Kingdom is positioned on the right side of the slide. The background features dark gray geometric shapes, including a large triangle and a parallelogram, creating a modern, abstract design.

Online Market Overview

Sept 2025

The UK Online Market Overview Sep 2025

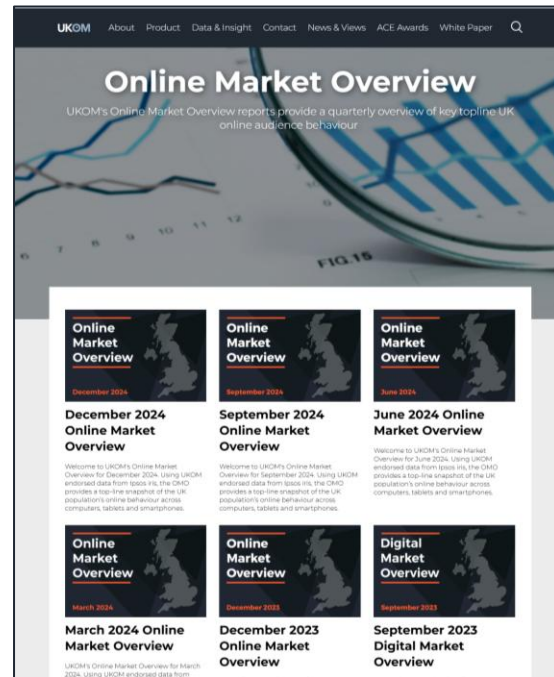


Overview

- This Online Market Overview focuses on the UK online audience on PC/laptop, tablet and smartphone in Sep 2025. The online measurement service Ipsos iris launched in 2021 and UKOM endorses the data for PC, tablet and smartphone
- 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

Methodology Updates

- New Universe: The new total internet population 15+ was updated in April 2025 to bring it in line with the latest PAMCo survey estimates.
- Yahoo and MSN distributed content was integrated into Ipsos iris from April 2025 under Publisher Organisations.



Contents



- In the news
- The UK online audience
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- Top organisations and brands
- Top mobile apps
- Key changes: Jun 25 – Sep 25

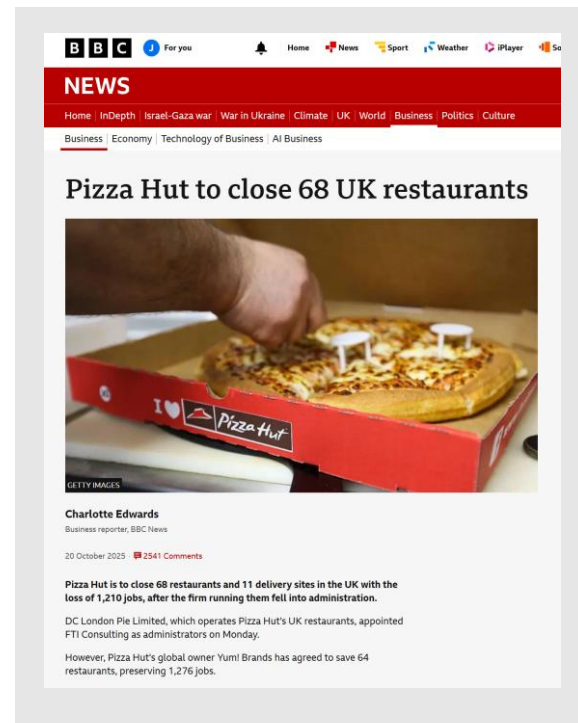
In the news



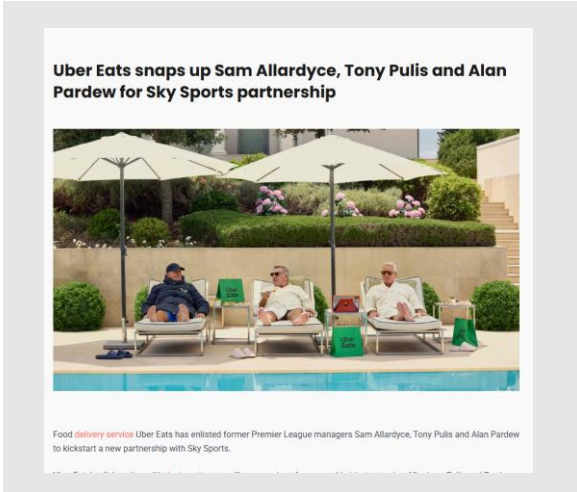
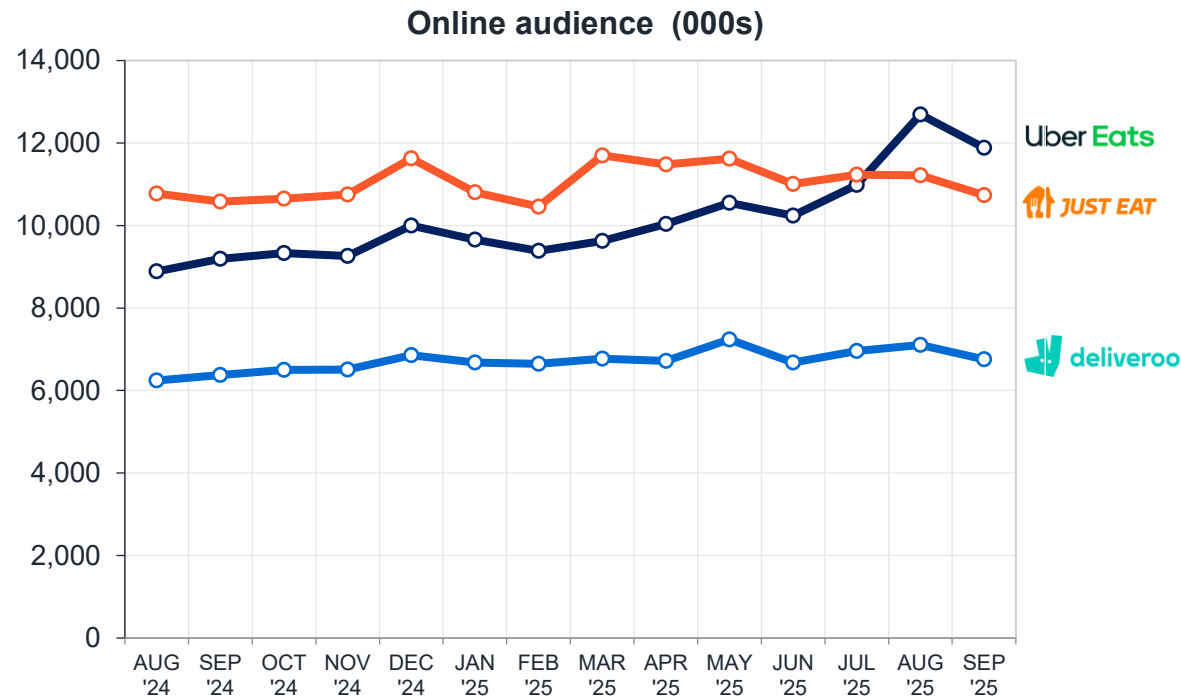
Pizza Hut ranks 10th among fast-food online brands, behind delivery aggregators



Top 10 fast-food/delivery brands – audience (000s)		Reach (%)
McDonald's	13,843	26.9
Uber Eats	11,885	23.1
Just Eat	10,732	20.8
Deliveroo	6,754	13.1
Dominos	4,024	7.8
Greggs	3,959	7.7
KFC	3,900	7.6
Burger King	1,409	2.7
Subway	1,303	2.5
Pizza Hut	1,285	2.5



Uber Eats' online audience surpassed Just Eat's at the start of the football season



	Audience (000s)		
	Aug 24	Aug 25	Diff
Uber Eats	8,887	12,692	+3,805
Just Eat	10,773	11,217	+444



Source: UKOM endorsed data for PC, Tablet and Smartphone in Ipsos iris, Aug 24 - Sep 25
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

Sky's YouTube audience & viewing time surges as the Premier League kicks Off (Jun - Sep 25)

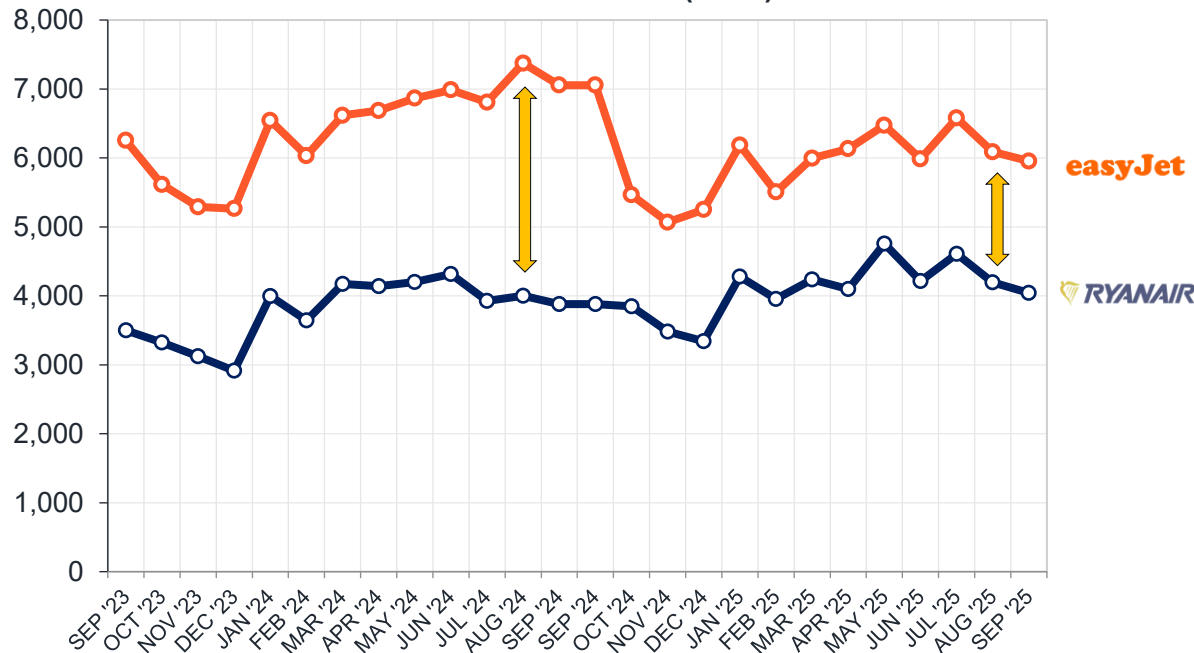


	Video Audience (000S)				Video Minutes (MM)			
	JUN '25	SEP '25	Change (%)	Change (abs)	JUN '25	SEP '25	Change (%)	Change (abs)
BBC Corporation (YouTube)	9,176	9,050	-1.38	-127	219	192	-12.40	-27
ITV Plc (YouTube)	8,416	7,597	-9.73	-819	295	281	-4.70	-14
Sky (YouTube)	5,051	7,008	+38.75	+1,957	145	185	+27.57	+40
Sky Sports - YouTube	2,499	4,219	+68.81	+1,720	66	110	+66.12	+44
Sky News - YouTube	3,172	3,486	+9.90	+314	73	68	-7.27	-5
Channel4 (YouTube)	5,417	5,576	+2.94	+159	137	129	-6.08	-8

The online audience gap between Ryanair and EasyJet narrows (Summer 24 vs 25)



Online audience (000s)



Ryanair made a fortune this summer – but air fares could soar until 2030

'The EU Parliament is proposing even more stupid rules', says Ryanair CEO Michael O'Leary

Simon Calder Travel Correspondent • Monday 03 November 2025 08:42 GMT • [Comments](#)



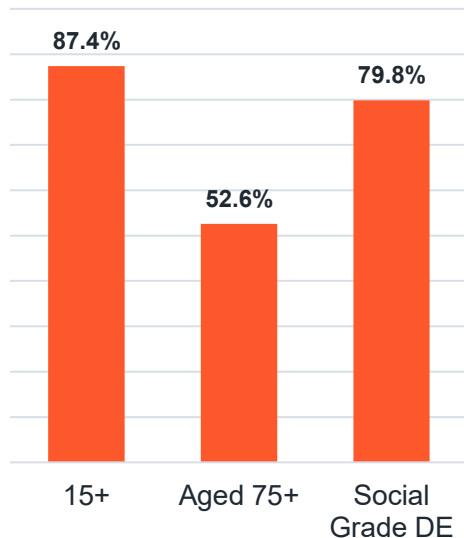
Public domain: Passengers board a Ryanair flight at Malpensa international airport. (Shutterstock / Getty Images)

	Audience (000s)		
	Jul-Sep 24	Jul-Sep 25	Diff
EasyJet	7,079	6,206	-873
Ryanair	3,936	4,282	+346

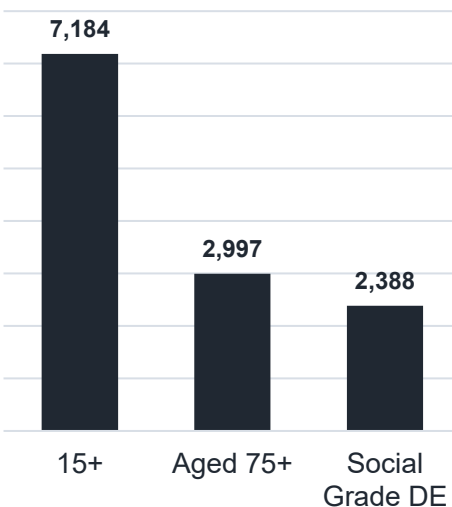
Over-75s and lower social grades may be impacted most by Ryanair's compulsory digital boarding passes



% of UK population who use a smartphone to go online



Audience (000s) who DO NOT use a smartphone to go online



Travel > News Travel

ON BOARD Ryanair reveals new date that printed boarding passes will be BANNED from all flights

Read on to find out more features on the 'myRyanair' app

Alice Penwill, Travel Reporter
Published: 11:52, 24 Sep 2025

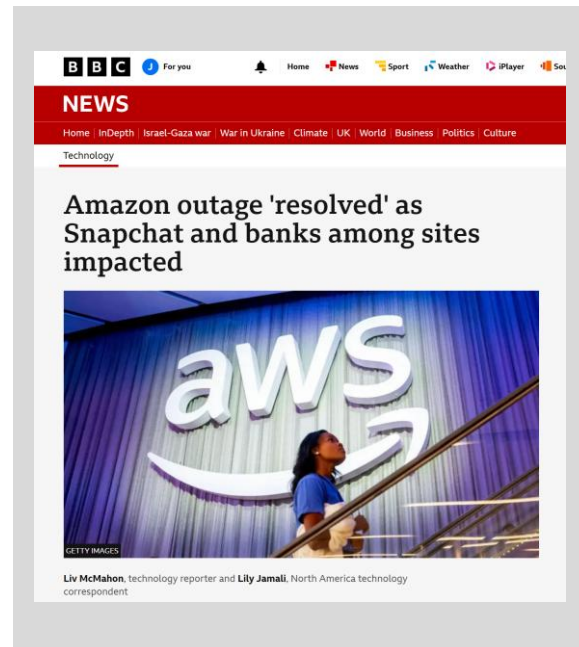


PASSENGERS flying with Ryanair will soon have to use a digital boarding pass as the airline introduces a strict new ban.

Widespread decline in app engagement on 20th October linked to AWS disruption



Mobile Apps	Minutes (000s)	D vs day before		W vs same day previous week	
Instagram	866,064	-10%	↓	-4%	↓
Snapchat	304,494	-23%	↓	-17%	↓
Facebook Messenger	100,860	-4%	↓	-7%	↓
Reddit	83,929	-21%	↓	-10%	↓
Duolingo	42,630	-22%	↓	-25%	↓
Twitch	8,871	-38%	↓	-7%	↓
Strava	8,634	-33%	↓	-3%	↓
Signal	2,198	-14%	↓	-7%	↓
IMDB	1,960	-27%	↓	-3%	↓
Coinbase	581	-44%	↓	-43%	↓

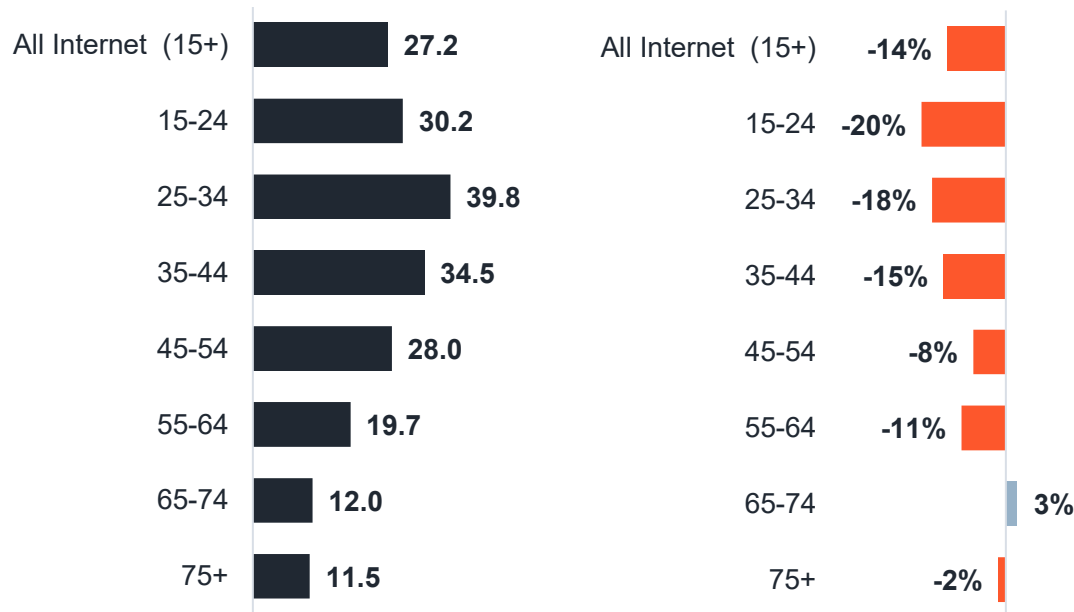


Online audience to adult content drops 2.3m following new age verification rules



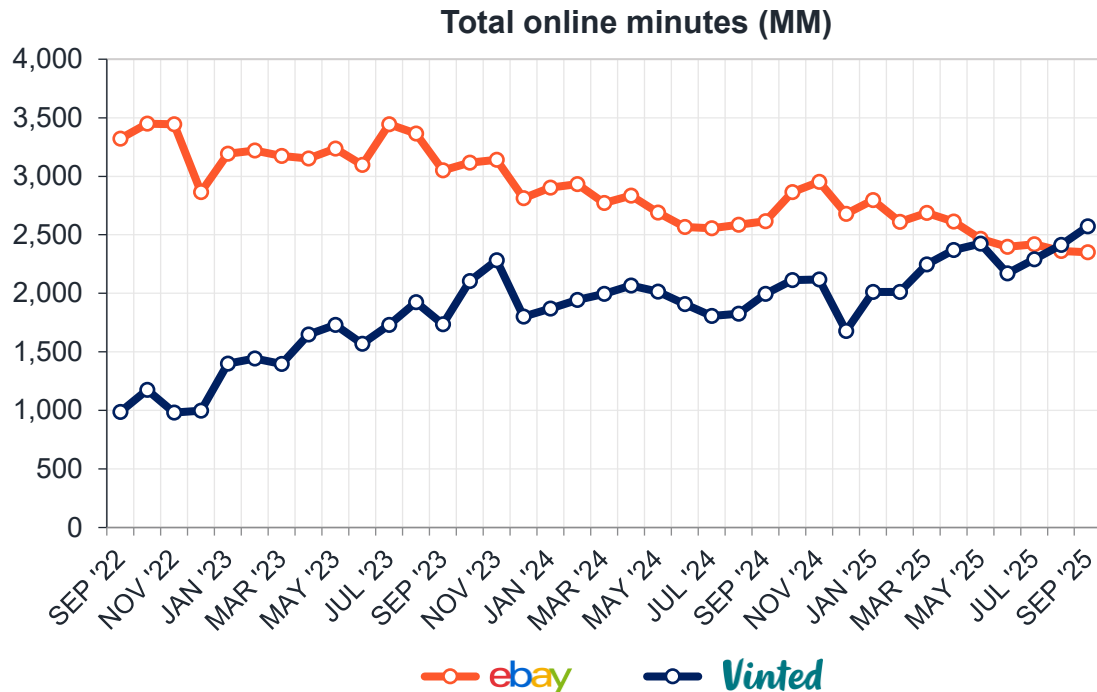
X-rated adult category reach (%)

% Change Jun - Sep 25



	Audience (000s)		
	Jun 25	Sep 25	Diff
Adult category 15+	16,319	14,017	-2301
Adult category 15-24	2,979	2,373	-607
Pornhub	9,632	6,639	-2993

Vinted now bigger than eBay for total online minutes as demand for pre-loved clothing booms



Marks & Spencer to open secondhand clothing store on eBay

Customers to get £5 vouchers for donating M&S clothes to Oxfam, which will get 15% of profits from eBay sales



M&S will reward customers for donations containing at least one M&S item with a £5 voucher when they spend £35 online. Photograph: Marks & Spencer

Five brands now account for 52% of all retail time online* and none of them are UK high street names



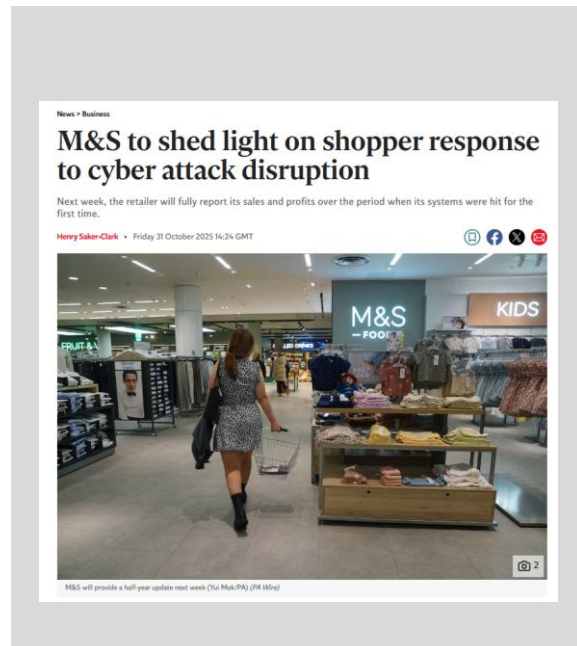
Top 5 online retail brands by TOTAL MINUTES					
	Media Brand	Total mins (MM)	Avg. mins pp	Share of online retail category minutes	Audience Reach (%)
1	Amazon	5,275	117:03	20%	87.5
2	Vinted	2,572	164:18	10%	30.4
3	eBay	2,351	73:56	9%	61.8
4	Temu	1,799	57:25	7%	60.8
5	Shein	1,591	97:08	6%	31.8



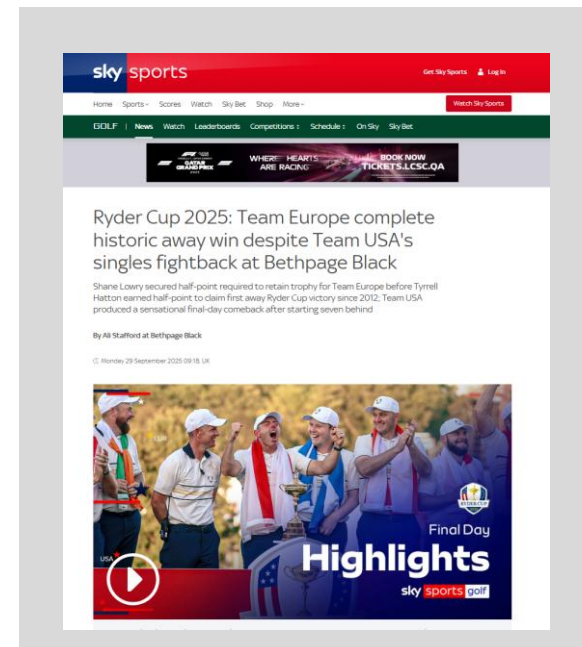
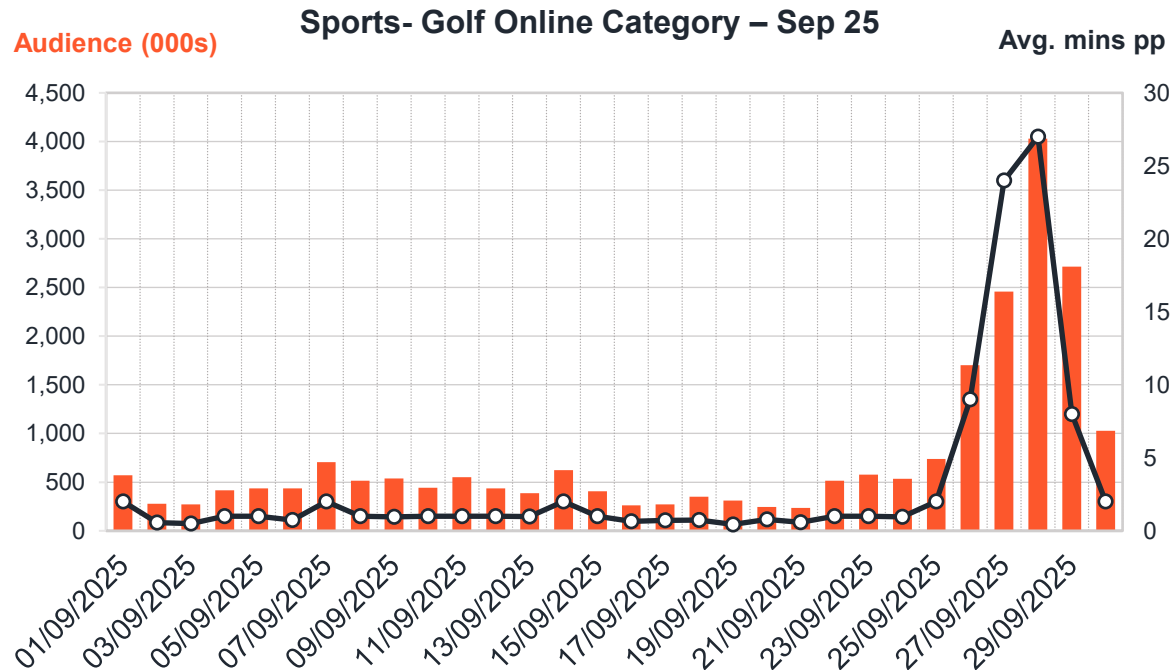
M&S recovers to pre-cyber attack levels, adding over 2m audience online Jun - Sep 25



M&S EST. 1884	Mar '25	Jun '25	Sep '25	Change Mar-Jun'25	Change Jun-Sep '25
Audience (000s)	14,697	12,699	14,732	-1,998	+2,033
Avg. mins pp	16:05	11:11	18:01	-04:54	+06:50
Total Minutes (MM)	236	142	266	-94	+124



Coverage of the Ryder Cup drove people to the Golf category at the end of Sep



The UK online audience

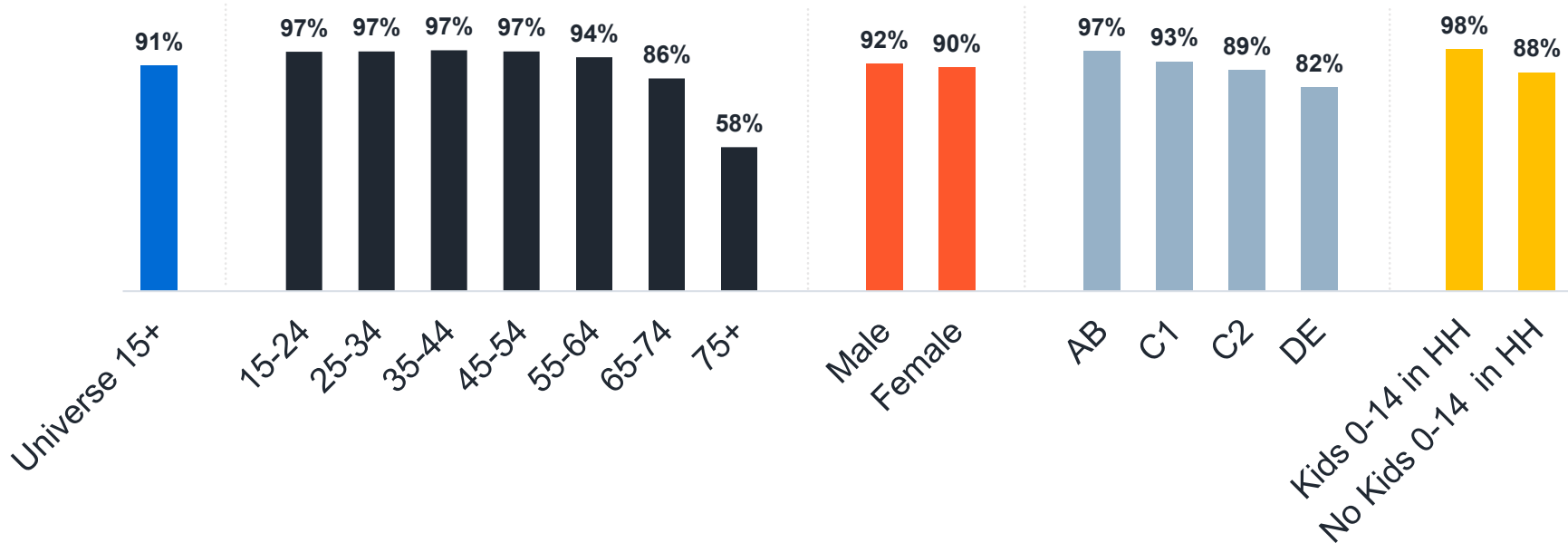


Internet penetration by demographics – Q3 25

Only 58% of those aged 75+ use the internet, compared to 97% of 15-24s



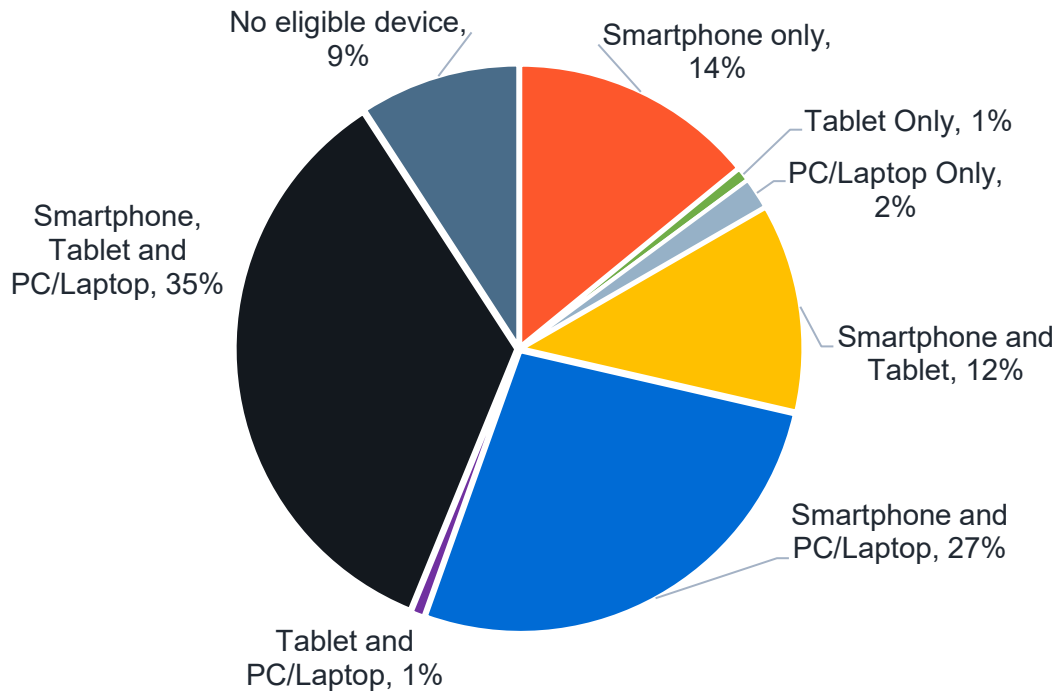
% of UK population who use the internet



Device usage by UK population – Q3 25



9% of the population do not use a smartphone, tablet or PC to go online – that is 5.2m people

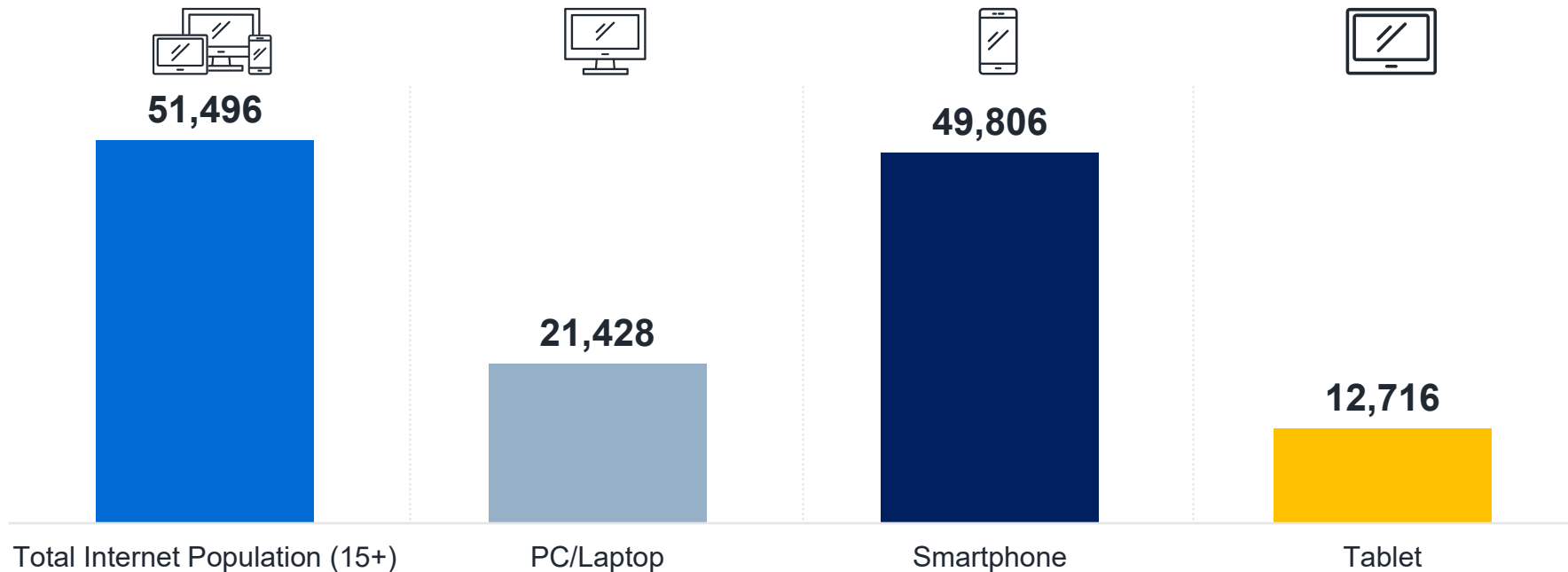


74% of the UK population are multi-device users, with over a third using all 3 types of device

88% of the UK online population use a smartphone. 14% are smartphone only

Online audience by devices used (000s)

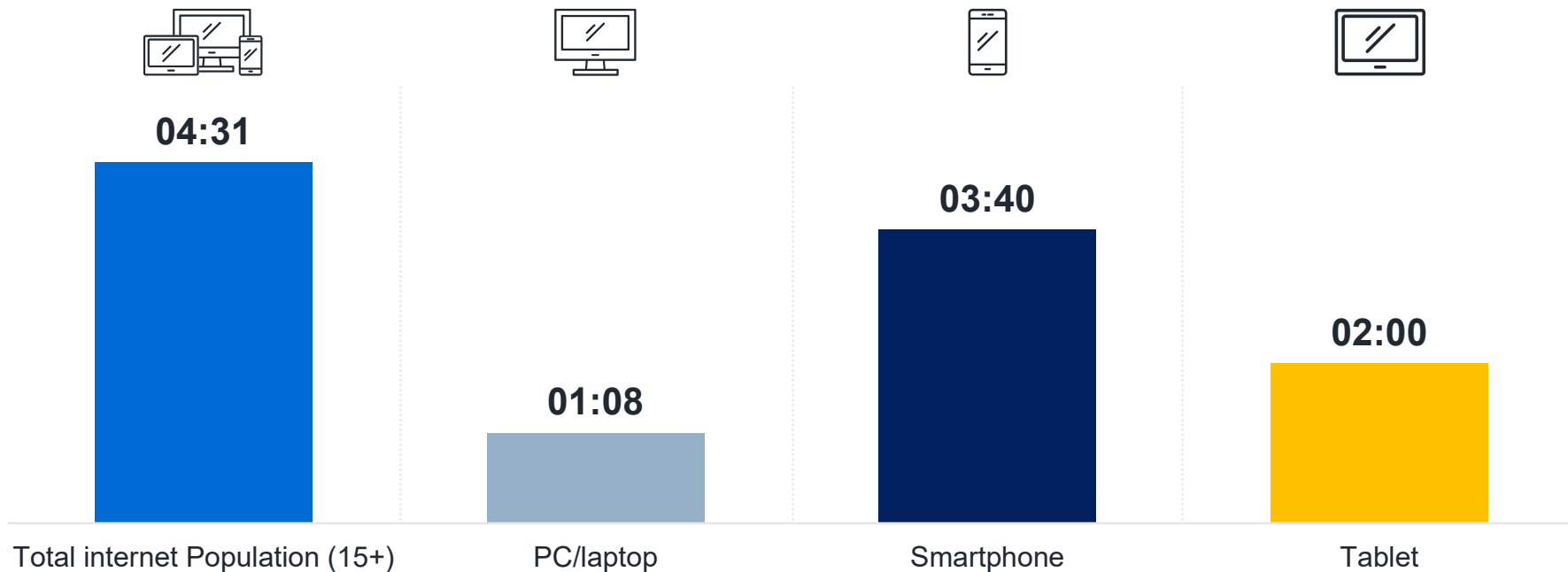
Most people now use a smartphone to go online in the UK



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



The UK internet population's average daily time online in September was 4 hrs 31 minutes

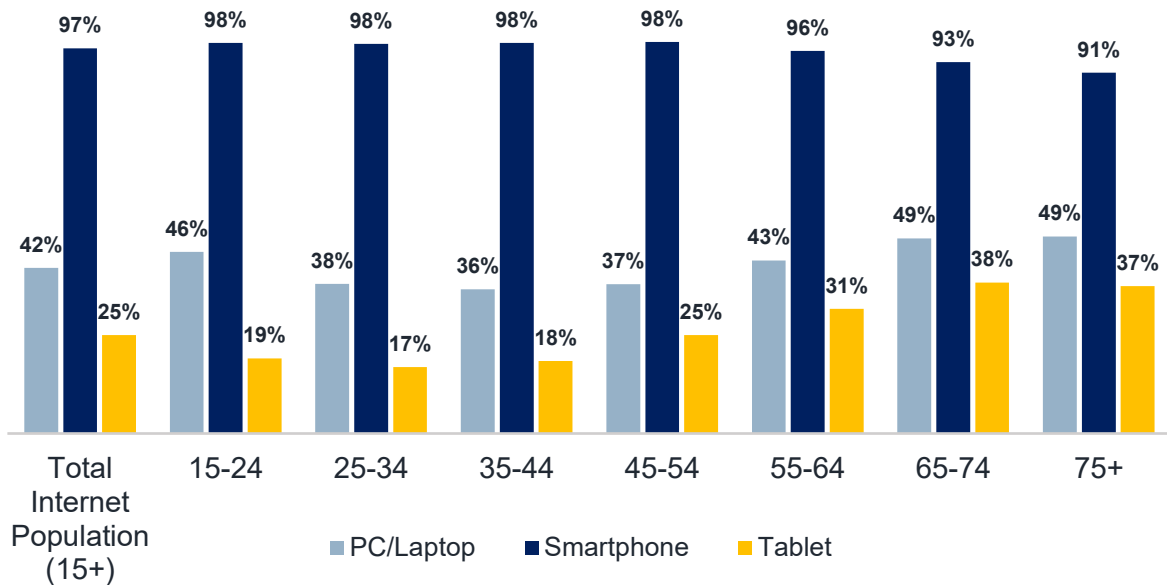


Devices used to go online by demographics

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



% of online audience who use each device



Females are less likely to use a PC/laptop – **36%** compared to **48%** for males



Households with children 0-5 are less likely to use a tablet – **19%** compared to **27%** for households with no children.

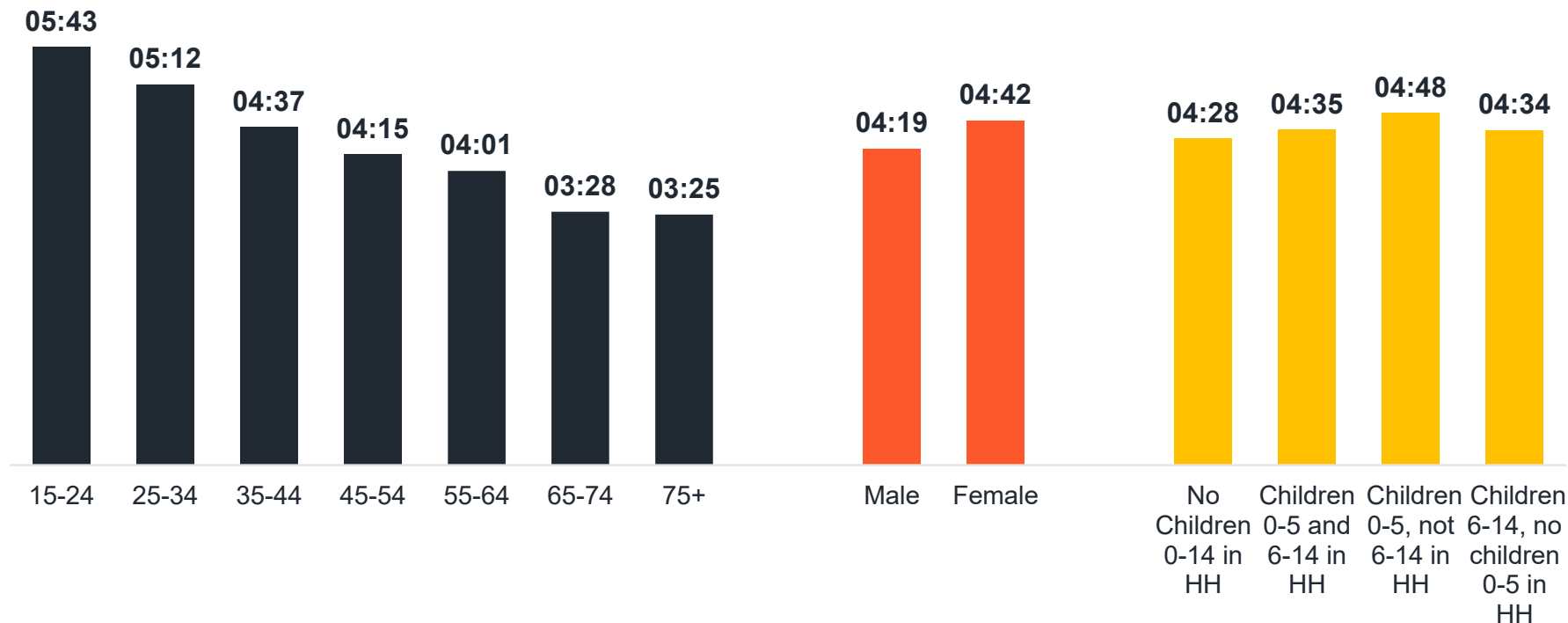
Time online



Average time spent online per day by demographics



Younger audiences and females spend longer online

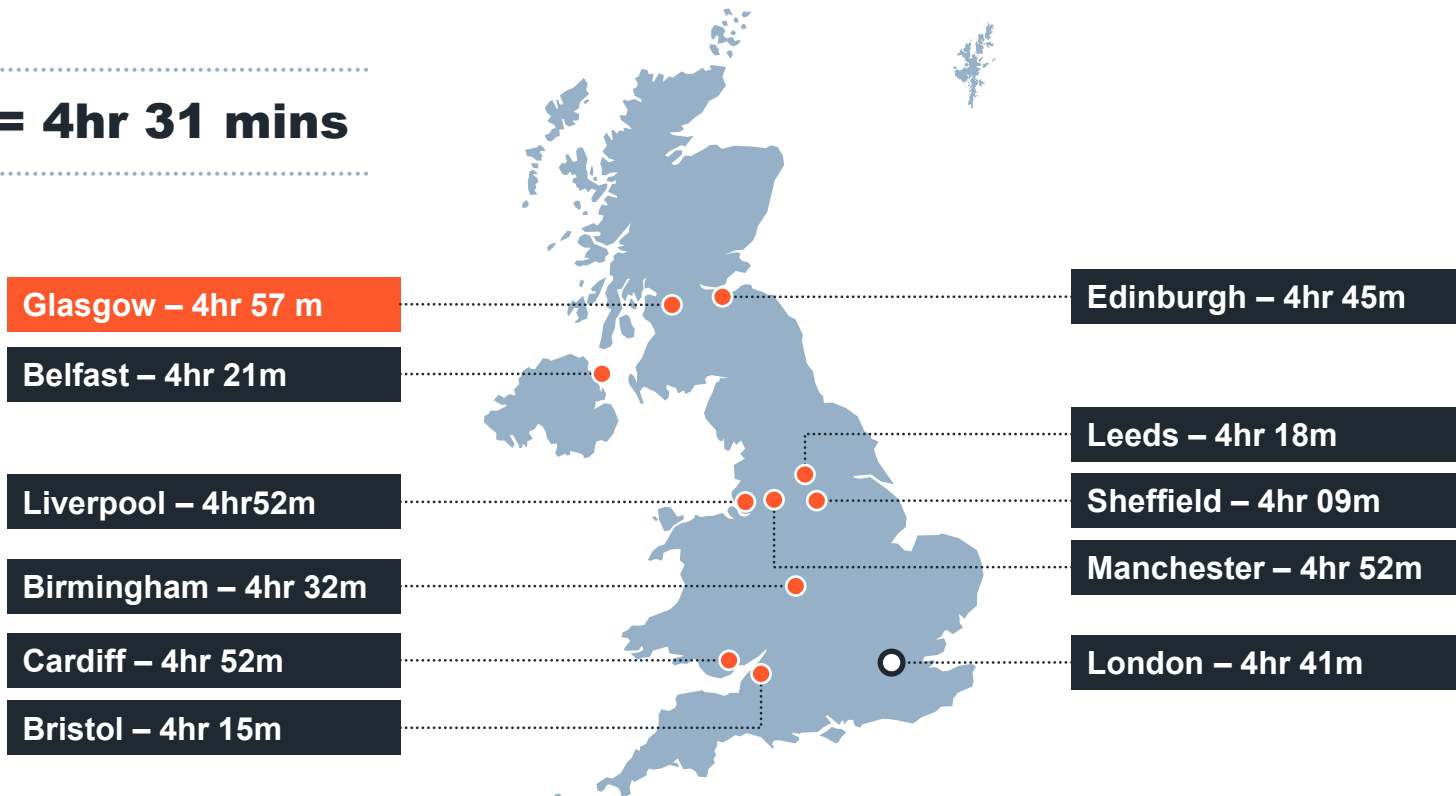


Average time online per day by city (hh:mm)

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

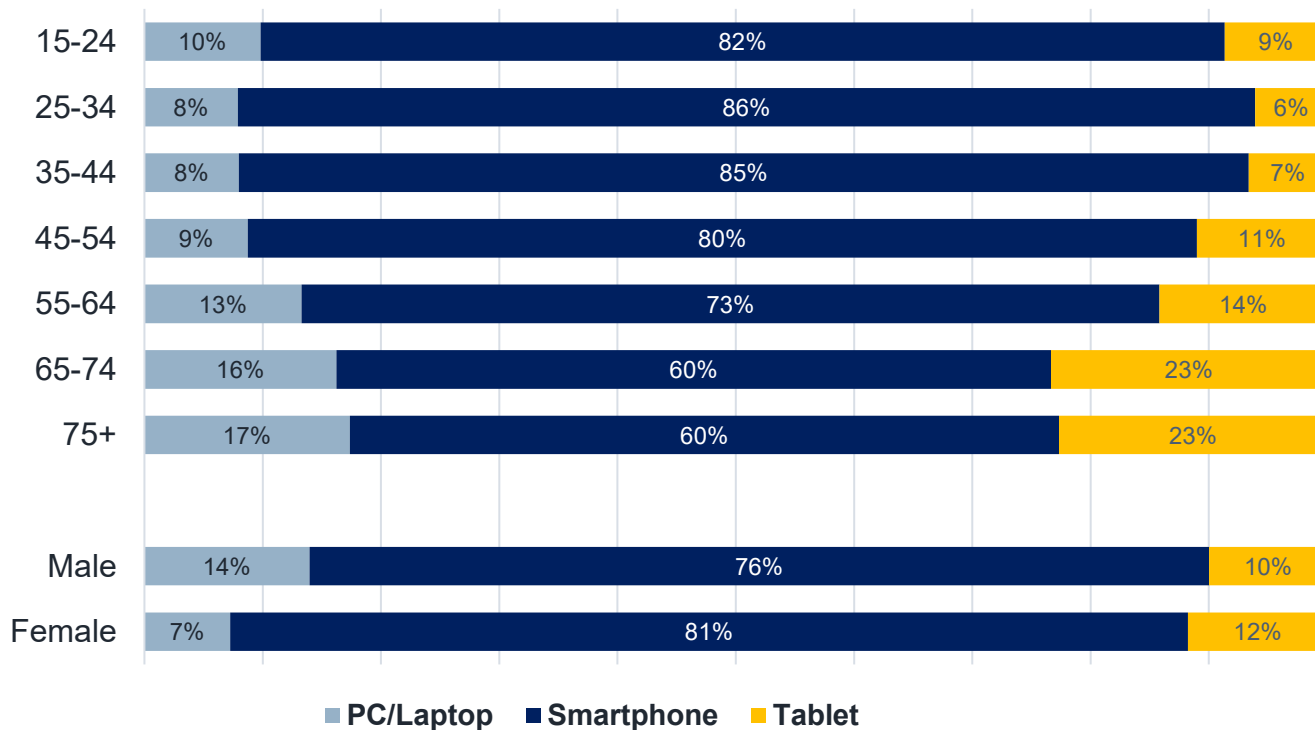


UK = 4hr 31 mins



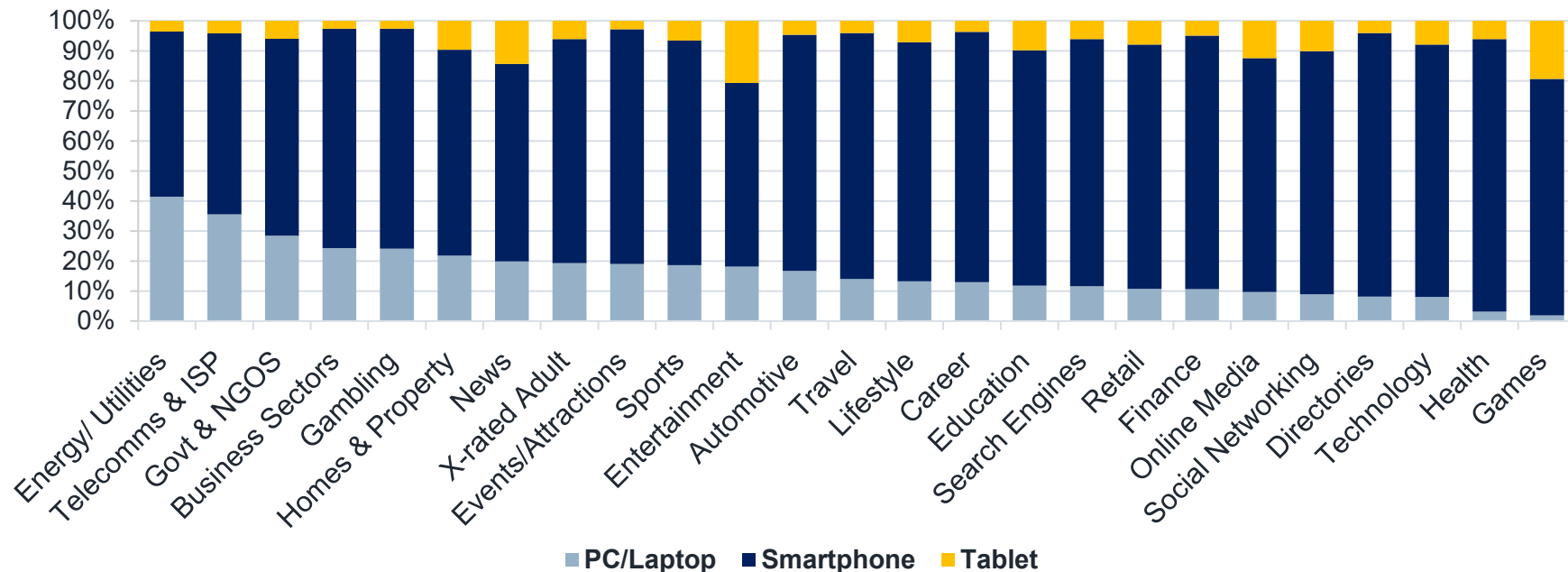
Device share of minutes by age and gender

Tablet and PC share is higher among older people.



Share of minutes (%) by device by category

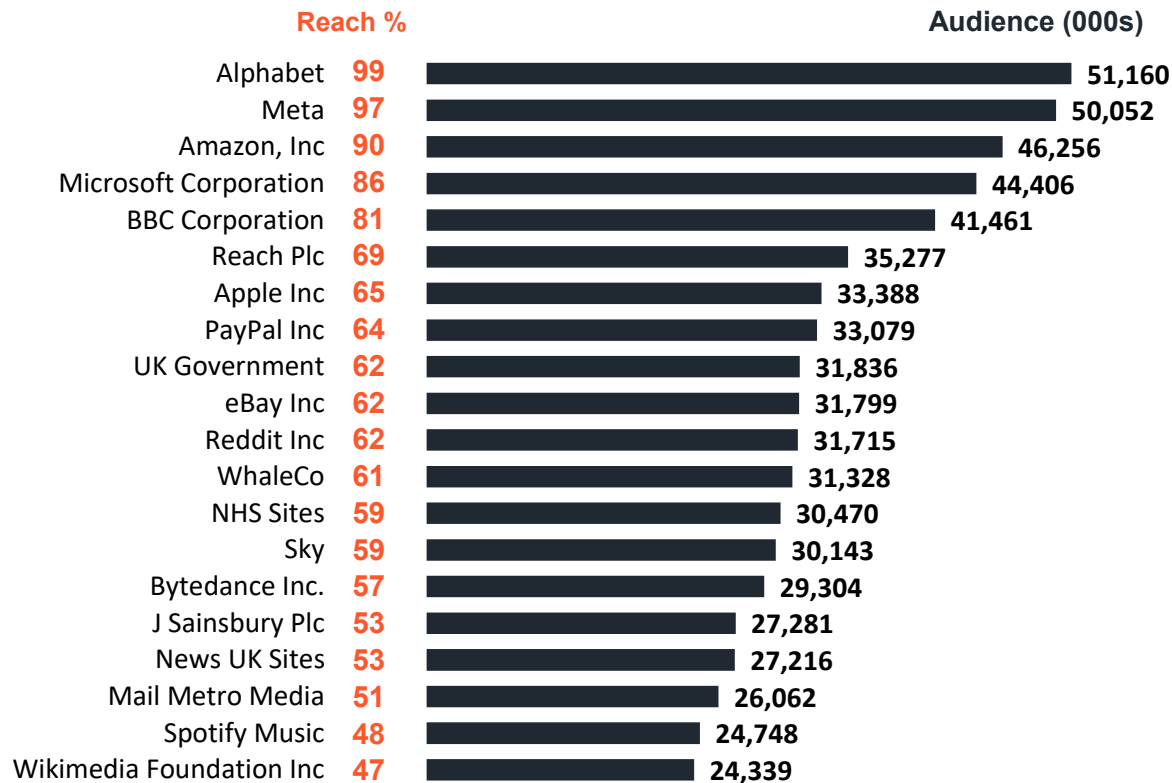
Smartphones are now the dominant device for all categories.



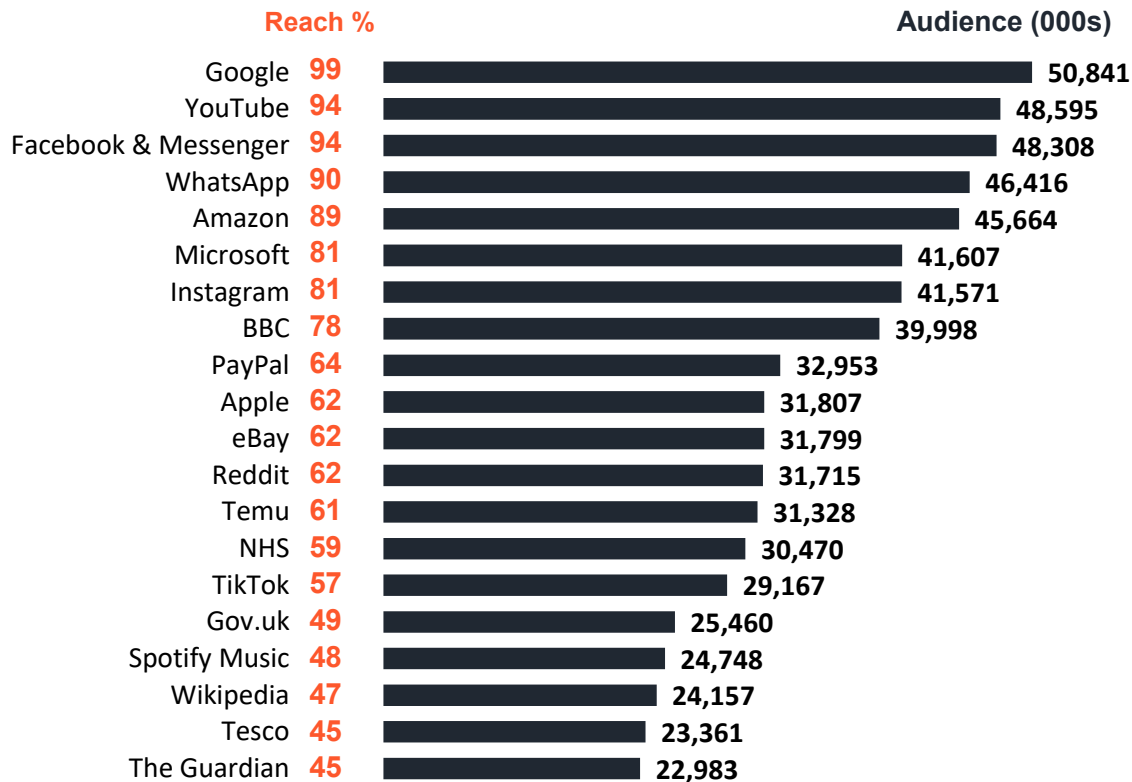
Top organisations and brands



Top 20 organisations by audience



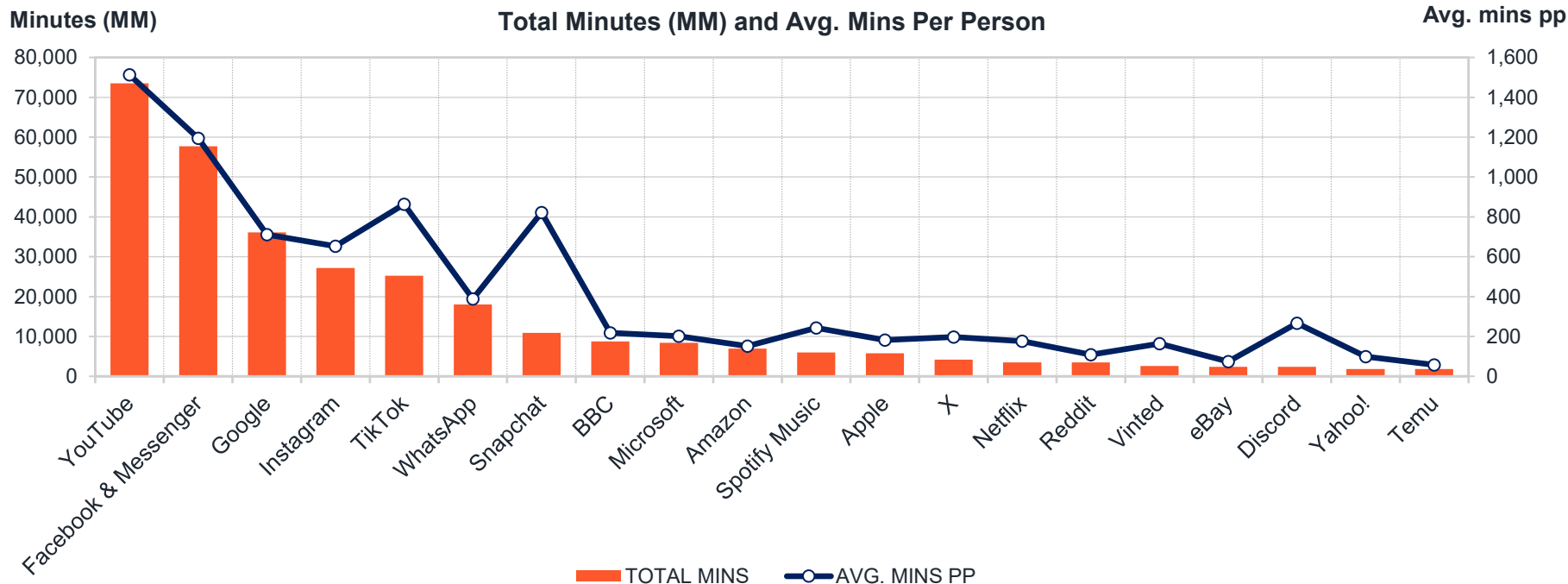
Top 20 online brands by audience



Top 20 brands by time spent



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

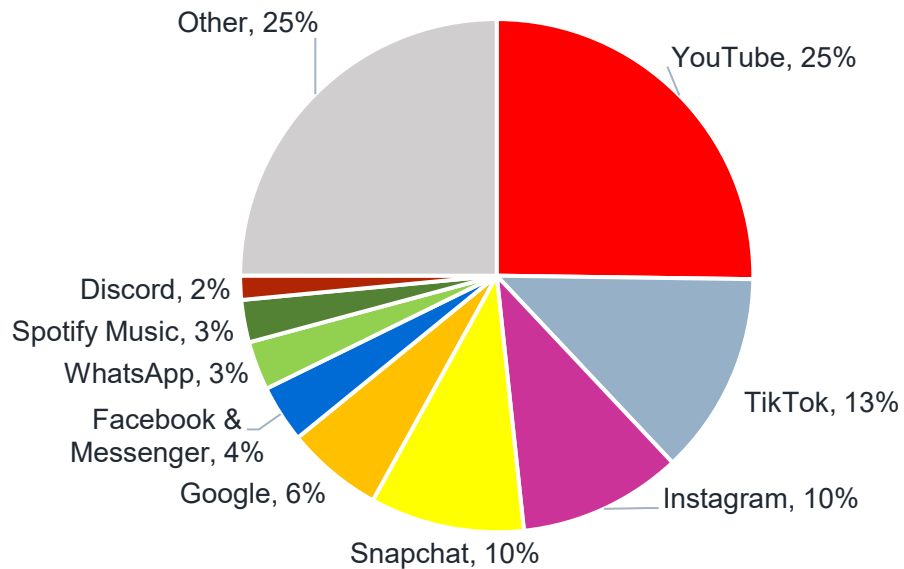


Brand share of minutes by age group: 15-24 v 55+

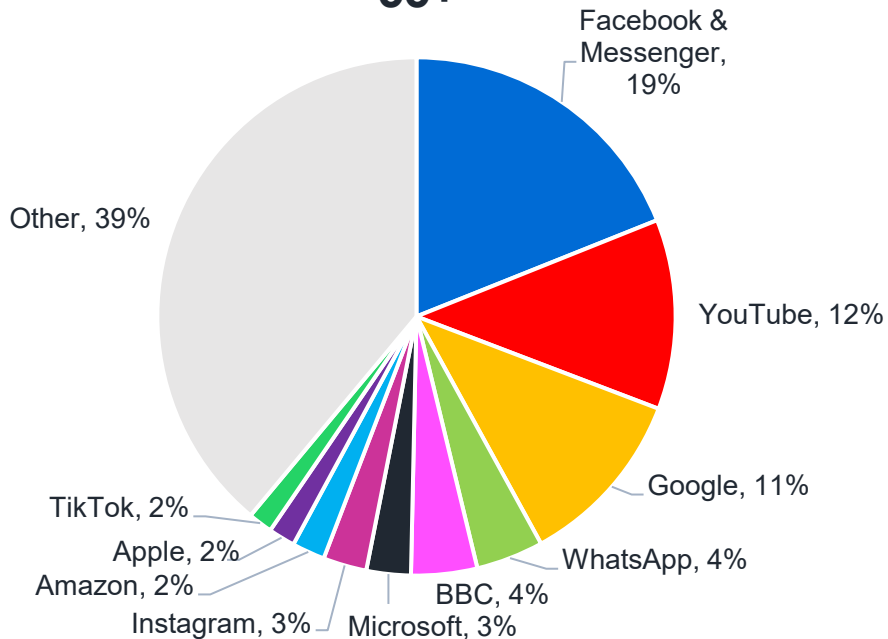


Top brands & SOM differs by age. Four brands generate 58% of all 15-24 minutes online

15-24



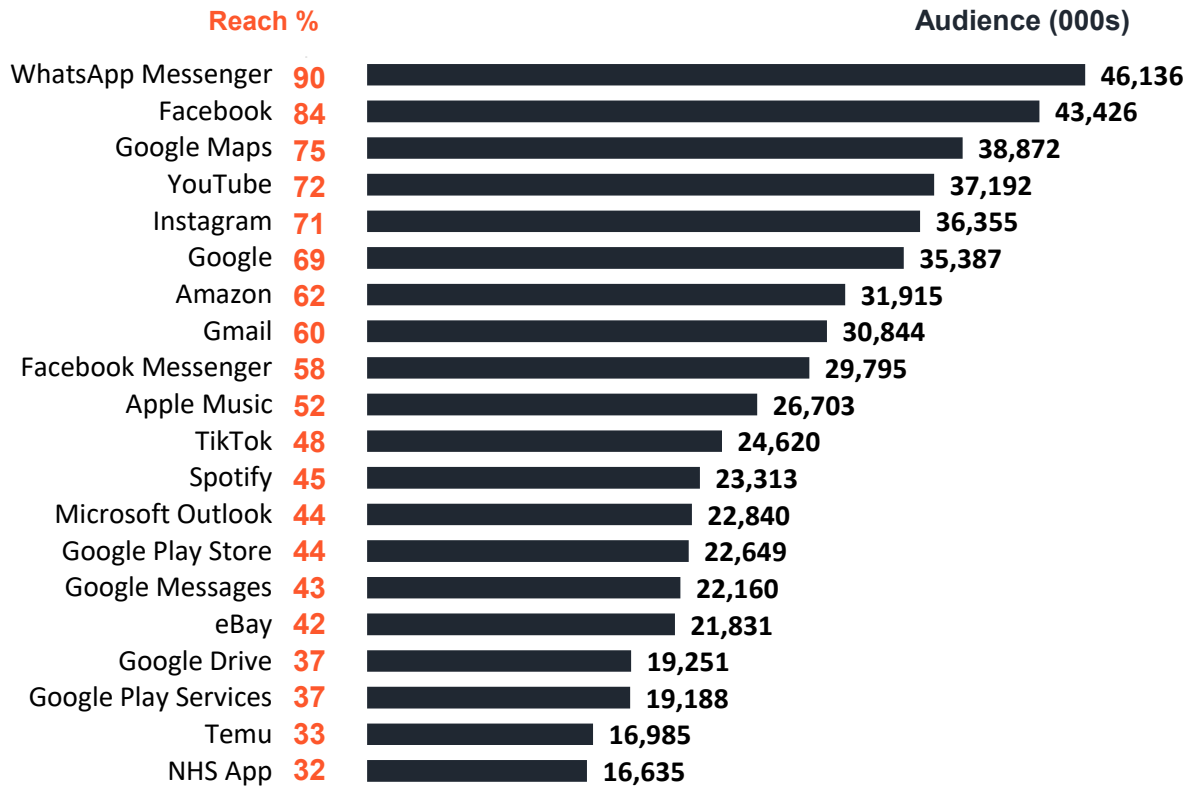
55+



Top mobile apps



Top 20 mobile apps by audience



Top 20 mobile apps by time spent

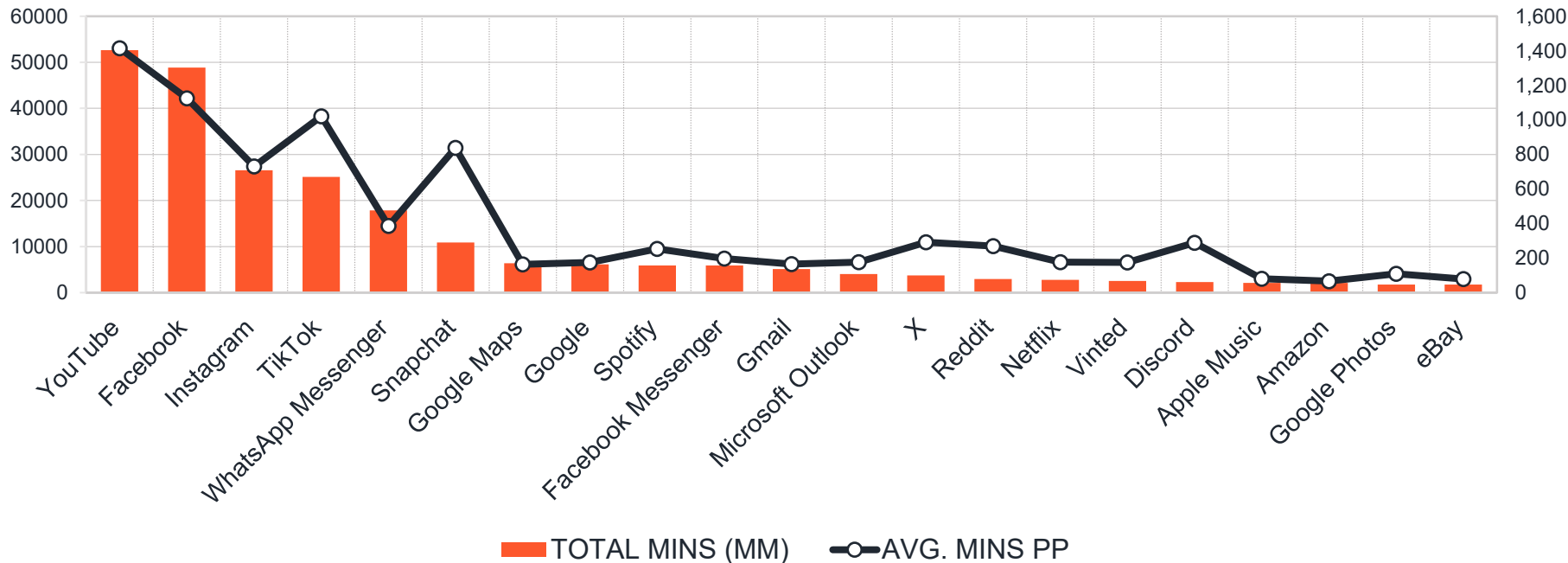
Video, social media and music dominate time spent on mobile apps



Minutes (MM)

Total minutes (MM) and avg. mins per person

Avg.Mins PP



Source: UKOM endorsed data for PC, Tablet and Smartphone in Ipsos iris, Sep 25

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. NB Duration not measured for sites or apps running in device background/'out of focus'.

*All music apps face challenges when it comes to accurately measuring usage duration so use with caution

Top 10 apps by minutes by mobile device

High engagement propels video streaming brands into the top 10 for time spent on tablets.



Smartphone Top 10

	Apps	Total Mins (MM)	Avg. Mins PP
1	Facebook	44,936	1053:10
2	YouTube	38,600	1077:21
3	Instagram	25,675	726:06
4	TikTok	24,435	1020:24
5	WhatsApp Messenger	17,595	383:00
6	Snapchat	10,705	829:50
7	Google Maps	6,250	162:42
8	Spotify*	5,500	241:11
9	Google	5,483	157:31
10	Facebook Messenger	4,509	156:41



Tablet Top 10

	Apps	Total Mins (MM)	Avg. Mins PP
1	YouTube	14,020	2548:39
2	Facebook	3,900	665:04
3	Facebook Messenger	1,395	430:28
4	Netflix	1,208	413:20
5	BBC iPlayer	926	407:59
6	Instagram	919	274:41
7	Roblox	817	1016:38
8	YouTube Kids	754	2716:27
9	TikTok	681	435:54
10	Google	679	158:40



Source: UKOM endorsed data for PC, Tablet and Smartphone in Ipsos iris, Sep 25

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. NB Duration not measured for sites or apps running in device background/'out of focus'.

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Key changes: Jun 25 - Sep 25

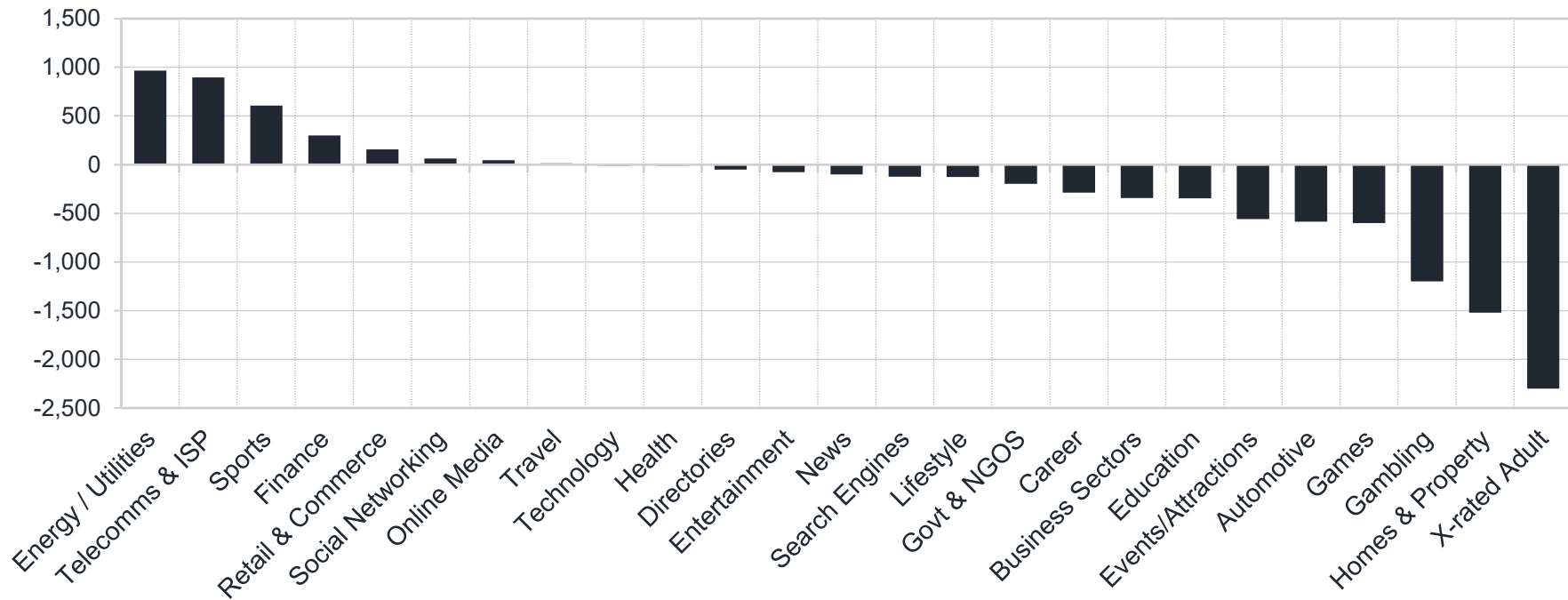


Major category audience change (000s): Jun - Sep 25



Major decline for the gambling, adult and property online categories.

Audience increase/decrease (000s)



Sports category audience change: Jun - Sep 25

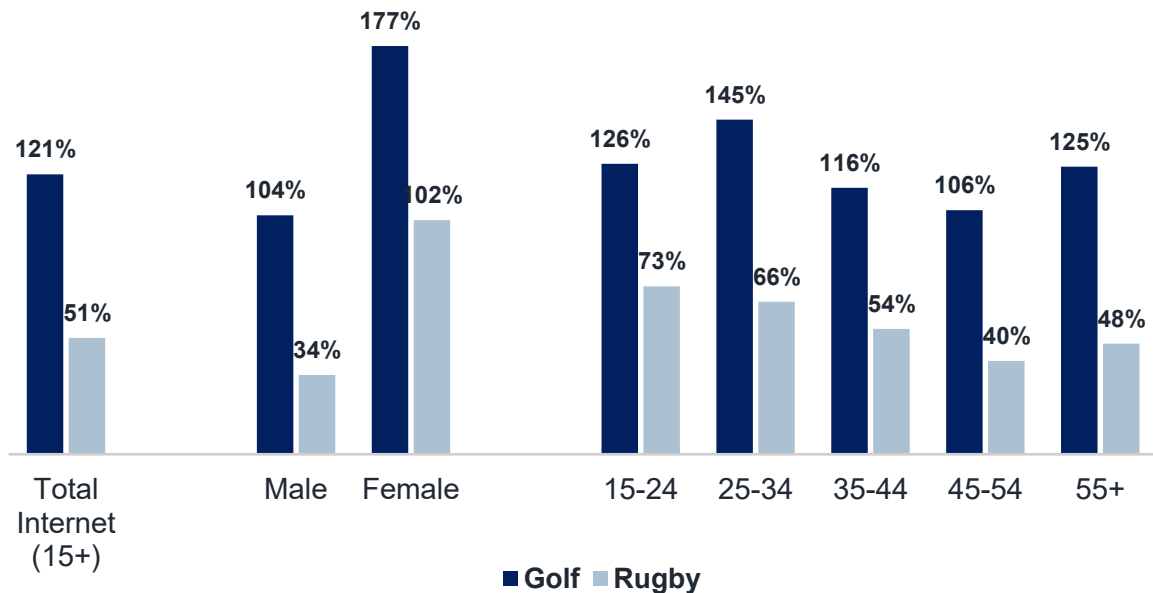
The Ryder Cup & Women's World Cup drove Golf & Rugby audience gains, while Premier League's return reignited football engagement



	Audience (000S)				Avg. Mins pp			
	JUN '25	SEP '25	Change (%)	Change (abs)	JUN '25	SEP '25	Change (%)	Change (abs)
Total Sports Category	31,108	31,716	2	608	65:09	90:29	39	25:21
Golf	3,122	6,914	121	3792	13:53	14:15	3	00:22
Rugby	4,556	6,858	51	2302	11:11	11:34	3	00:23
Athletics	1,243	3,472	179	2229	03:02	08:03	165	05:01
American Football	687	1,393	103	706	02:43	08:43	221	06:00
Snooker	57	439	665	381	01:37	03:23	110	01:47
Football	20,903	21,065	1	162	26:25	49:00	85	22:35

Golf and rugby audience growth: Jun - Sep 25

Audience increases were higher for females for both sports.



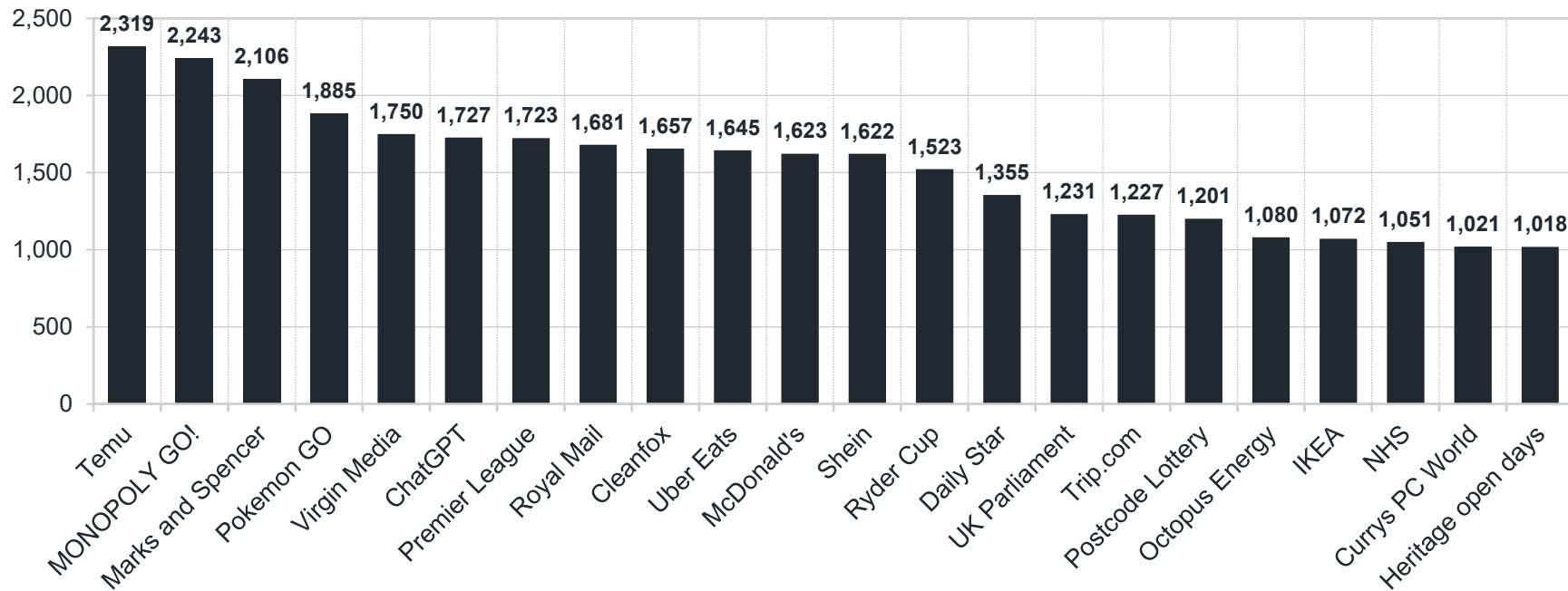
Females comprised 32% of the **rugby** category online audience in September, up from 24% in June – attracted by the **Women's Rugby World Cup**.

The **Ryder Cup** also helped change **golf's** profile. Women were 31% of the audience in Sep v 24% in Jun as the female audience grew by 177%.

Brands adding >1 million audience: Jun - Sep 25



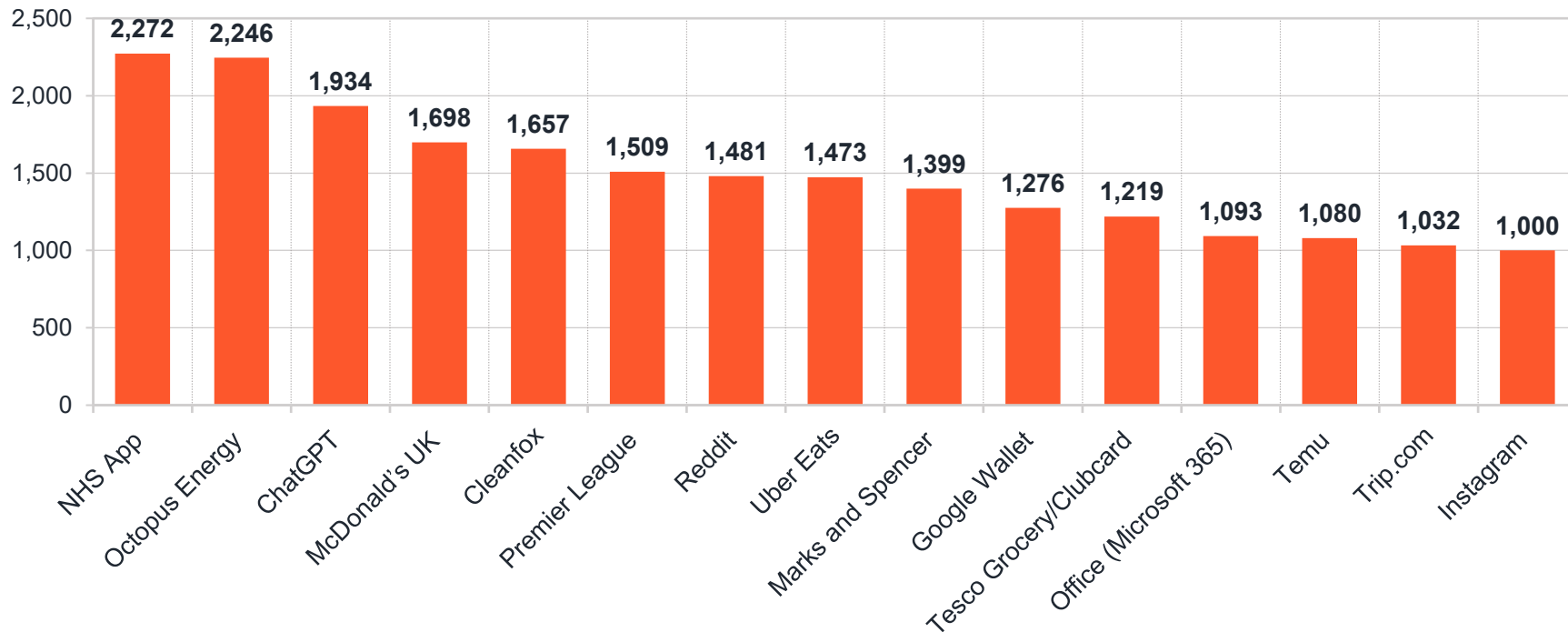
Audience Gain (000s)



Mobile apps adding >1 million audience: Jun - Sep 25



Audience Gain (000s)





Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

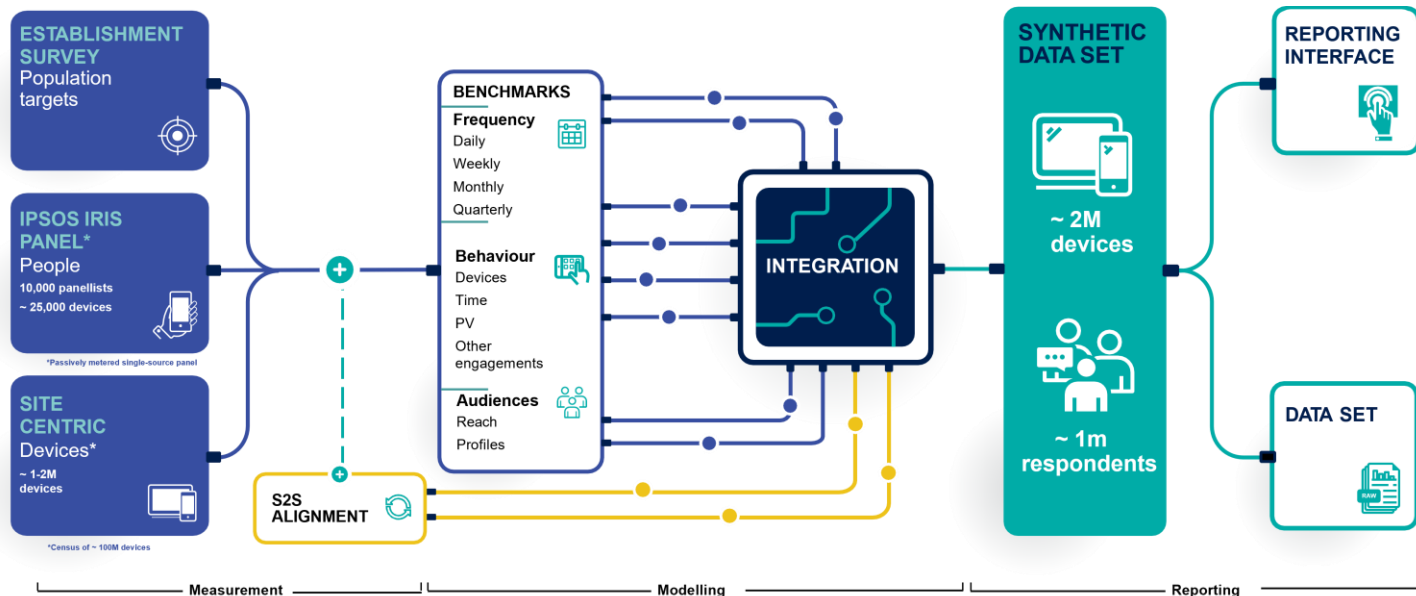
Methodology



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

Ipsos iris is the measurement service of audiences of online content and ad campaigns and UKOM endorses the data within covering content on PC, tablet and smartphone. 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 find 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>