UKOM

Digital Market Overview

July 2022

The UK Digital Market Overview July 2022

This Digital Market Overview focuses on UK online audience on PC, tablet and smartphone in July 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.
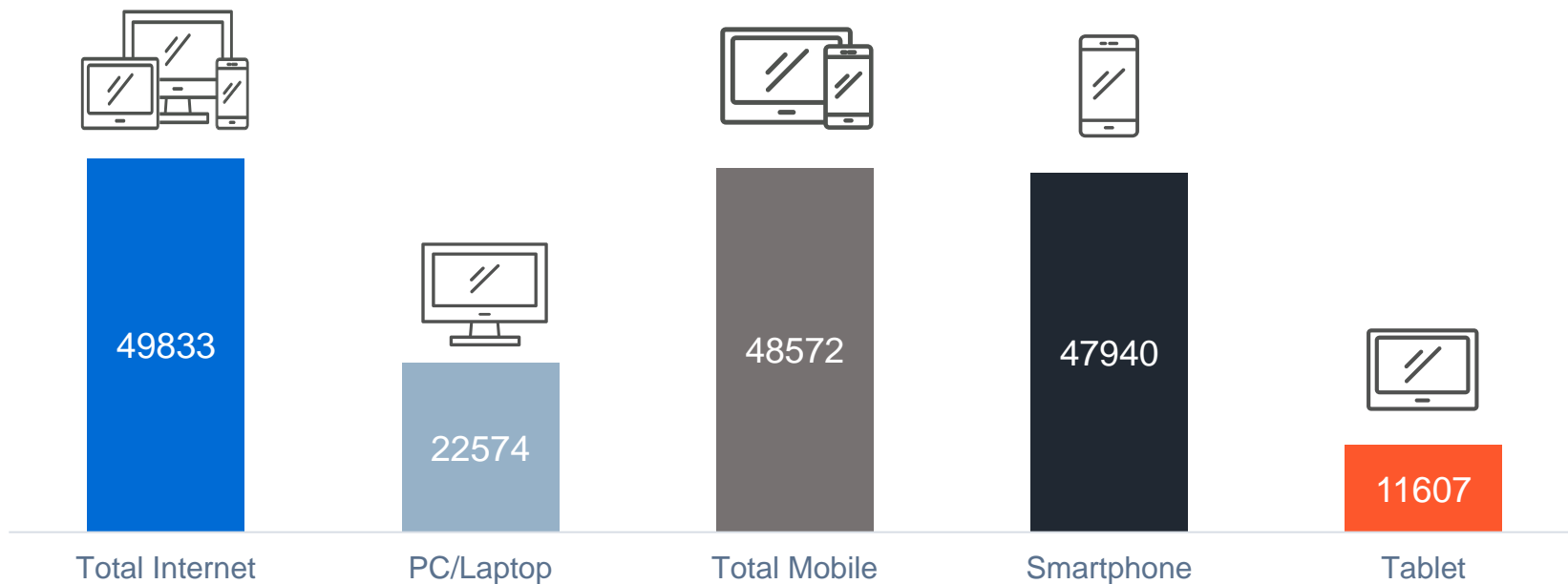
Audience by device

Online audience by device (000s)

More than twice as many people use smartphones than computers

UKOM

49833	22574	48572	47940	11607
Total Internet	PC/Laptop	Total Mobile	Smartphone	Tablet

Ipsos

Device split by age

Reach of tablets increases with increasing age

UKOM

Device reach by Online audience (%)
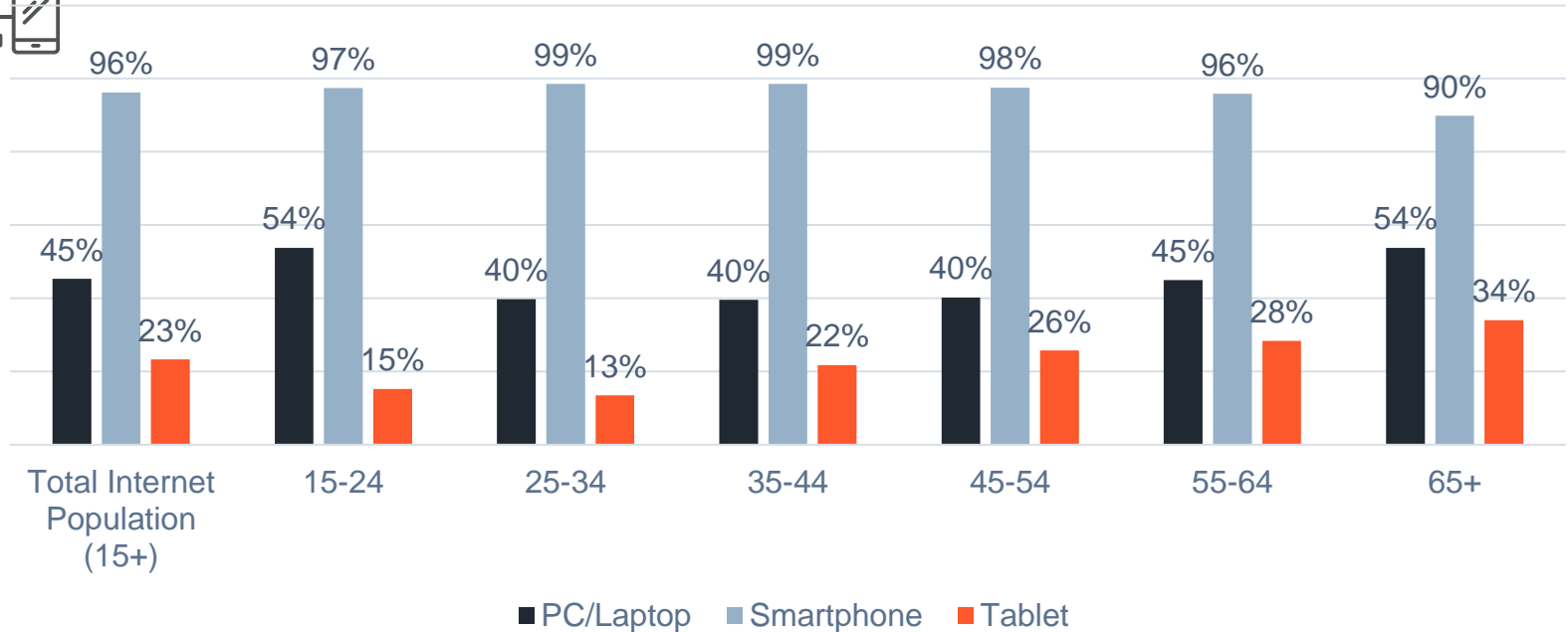
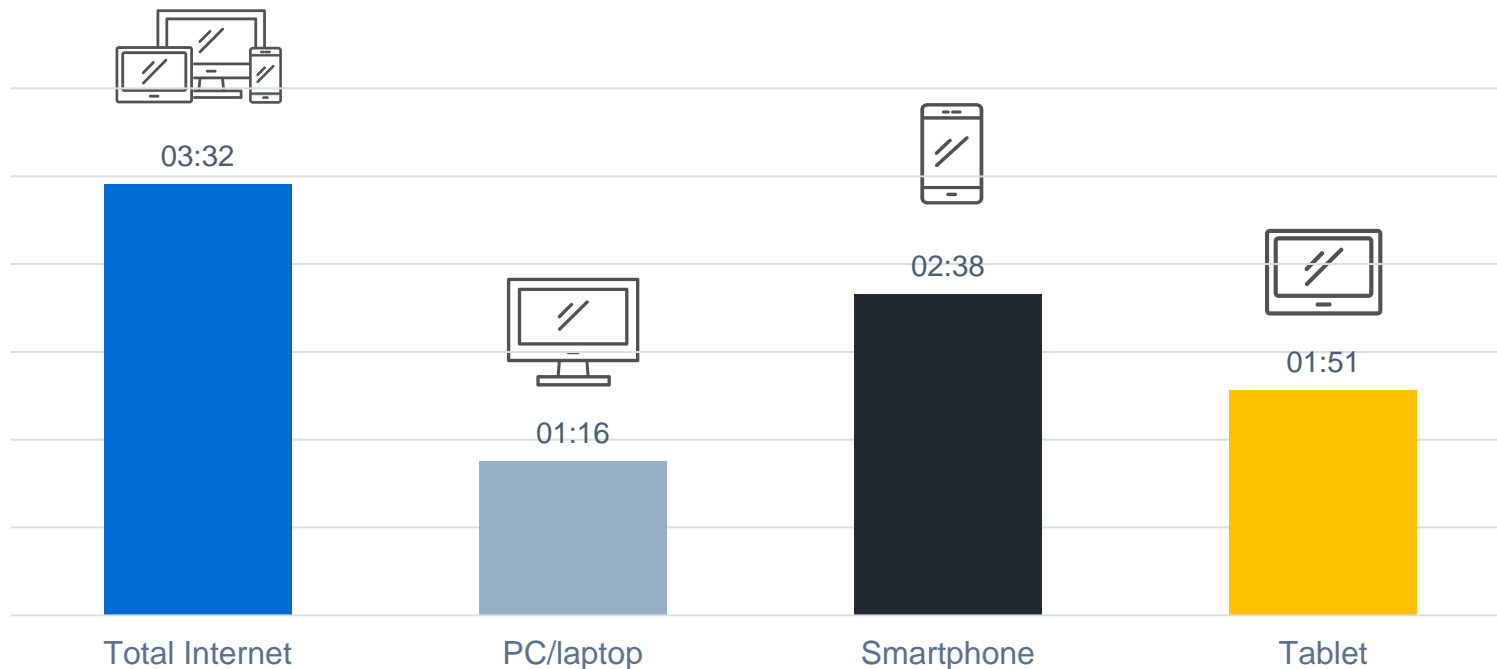|	PC/Laptop	Smartphone	Tablet
Total Internet Population (15+)	45%	96%	23%
15-24	54%	97%	15%
25-34	40%	99%	13%
35-44	40%	99%	22%
45-54	40%	98%	26%
55-64	45%	96%	28%
65+	54%	90%	34%

■ PC/Laptop   ■ Smartphone   ■ Tablet

Ipsos

Time online

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

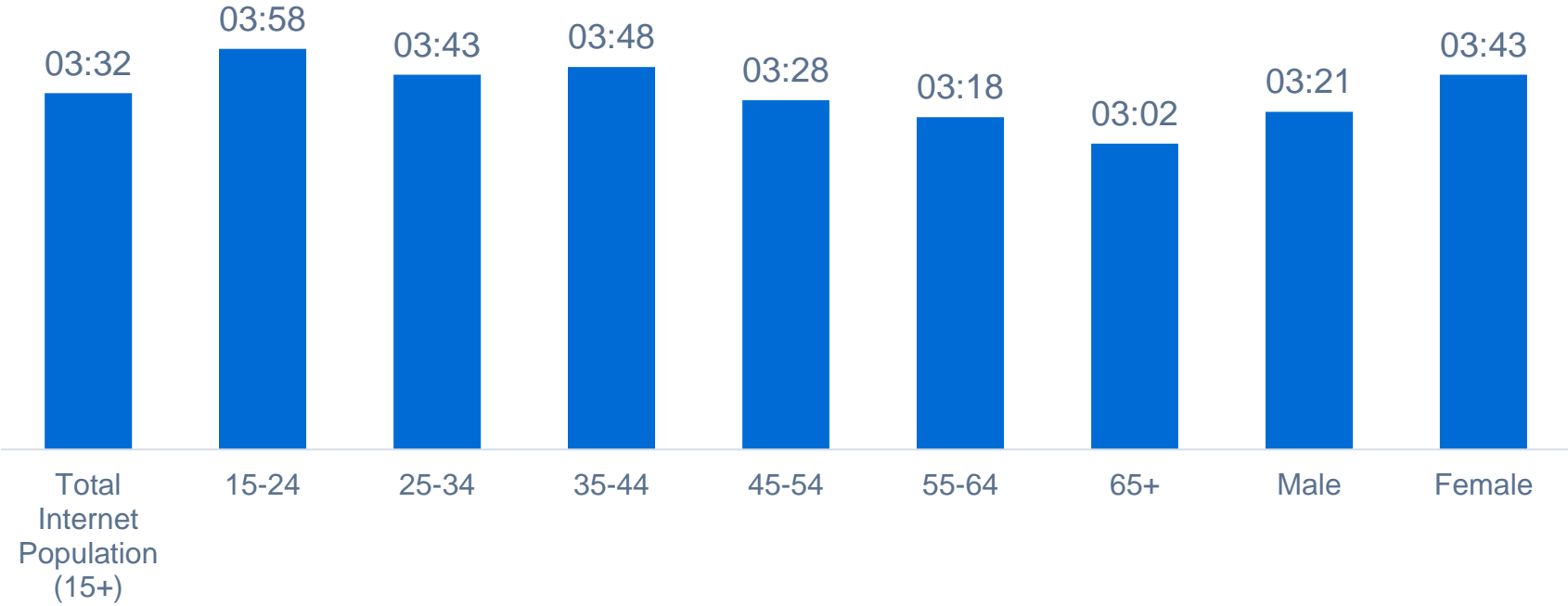Smartphone users drive time online - they spend on average over 2.5 hrs a day using their device

Total Internet	PC/laptop	Smartphone	Tablet
03:32	01:16	02:38	01:51

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

Younger audiences and females spend most time online

UKOM

	03:32	03:58	03:43	03:48	03:28	03:18	03:02	03:21	03:43
	Total Internet Population (15+)	15-24	25-34	35-44	45-54	55-64	65+	Male	Female

Ipsos

Average time online per day – households with kids (hh:mm)

Parents with children aged 0-5 spend longer online, primarily on smartphones
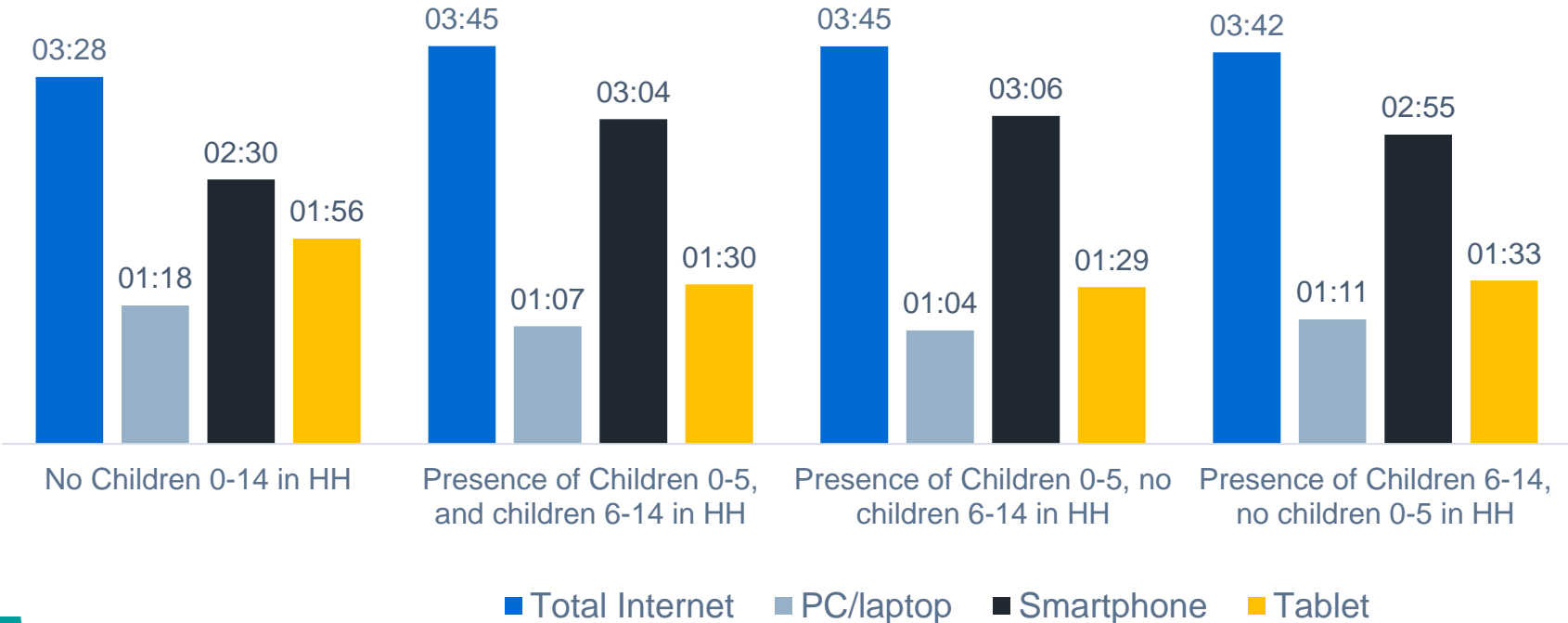
UKOM

No Children 0-14 in HH
- Total Internet: 03:28
- PC/laptop: 01:18
- Smartphone: 02:30
- Tablet: 01:56

Presence of Children 0-5, and children 6-14 in HH
- Total Internet: 03:45
- PC/laptop: 01:07
- Smartphone: 03:04
- Tablet: 01:30

Presence of Children 0-5, no children 6-14 in HH
- Total Internet: 03:45
- PC/laptop: 01:04
- Smartphone: 03:06
- Tablet: 01:29

Presence of Children 6-14, no children 0-5 in HH
- Total Internet: 03:42
- PC/laptop: 01:11
- Smartphone: 02:55
- Tablet: 01:33

■ Total Internet   ■ PC/laptop   ■ Smartphone   ■ Tablet

Ipsos

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

Residents of Glasgow & Cardiff spend on average 21 more minutes per day online than those in Belfast
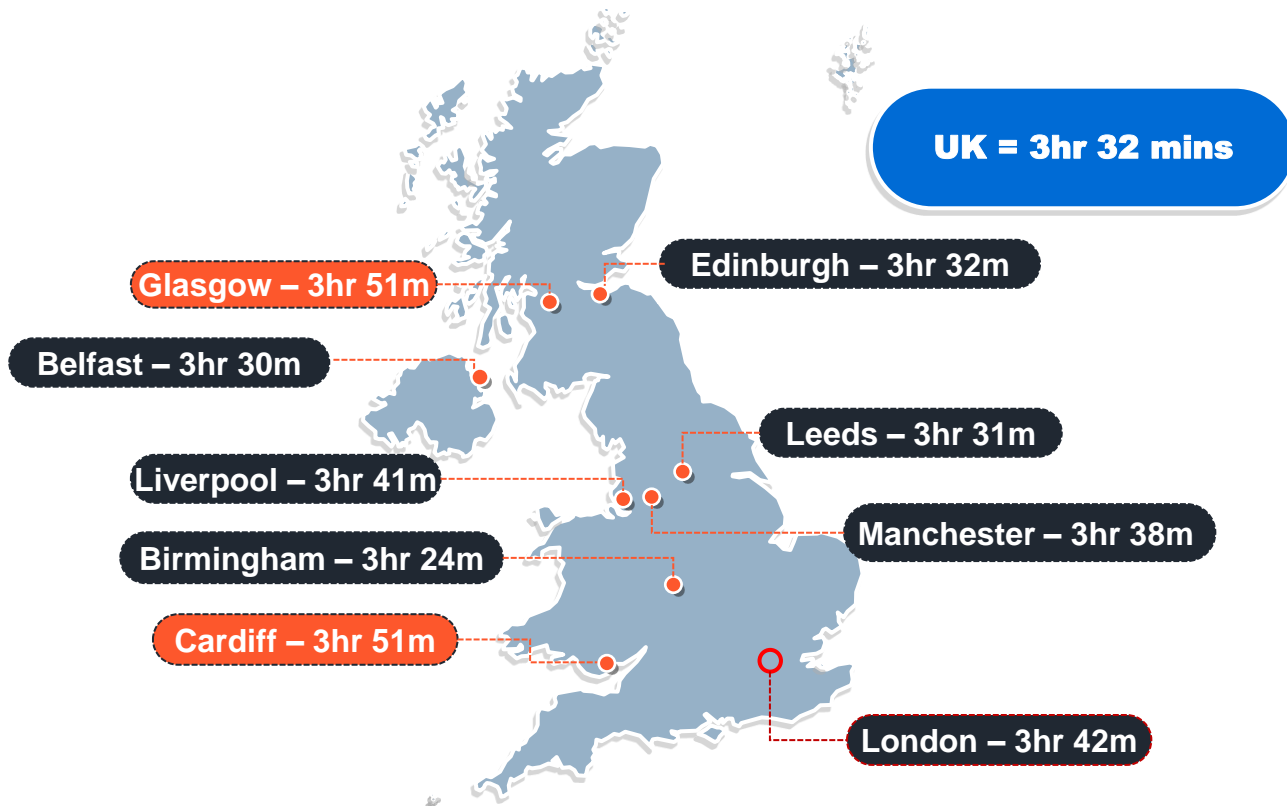
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UK = 3hr 32 mins

Glasgow – 3hr 51m

Edinburgh – 3hr 32m

Belfast – 3hr 30m

Leeds – 3hr 31m

Liverpool – 3hr 41m

Manchester – 3hr 38m

Birmingham – 3hr 24m

Cardiff – 3hr 51m

London – 3hr 42m

Ipsos

Share of minutes by device

Smartphones account for 72% of time online
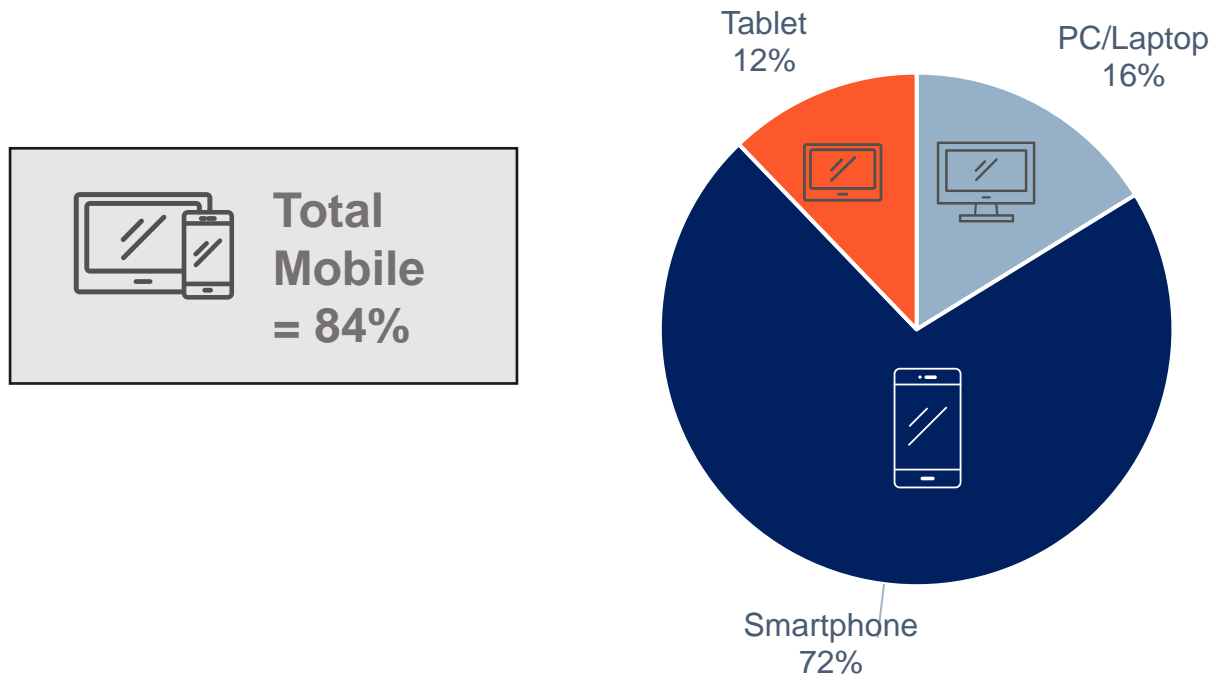
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Tablet
12%

PC/Laptop
16%

Total
Mobile
= 84%

Smartphone
72%

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Device share of minutes by age and gender

Females and younger audiences spend a greater share of time on smartphones
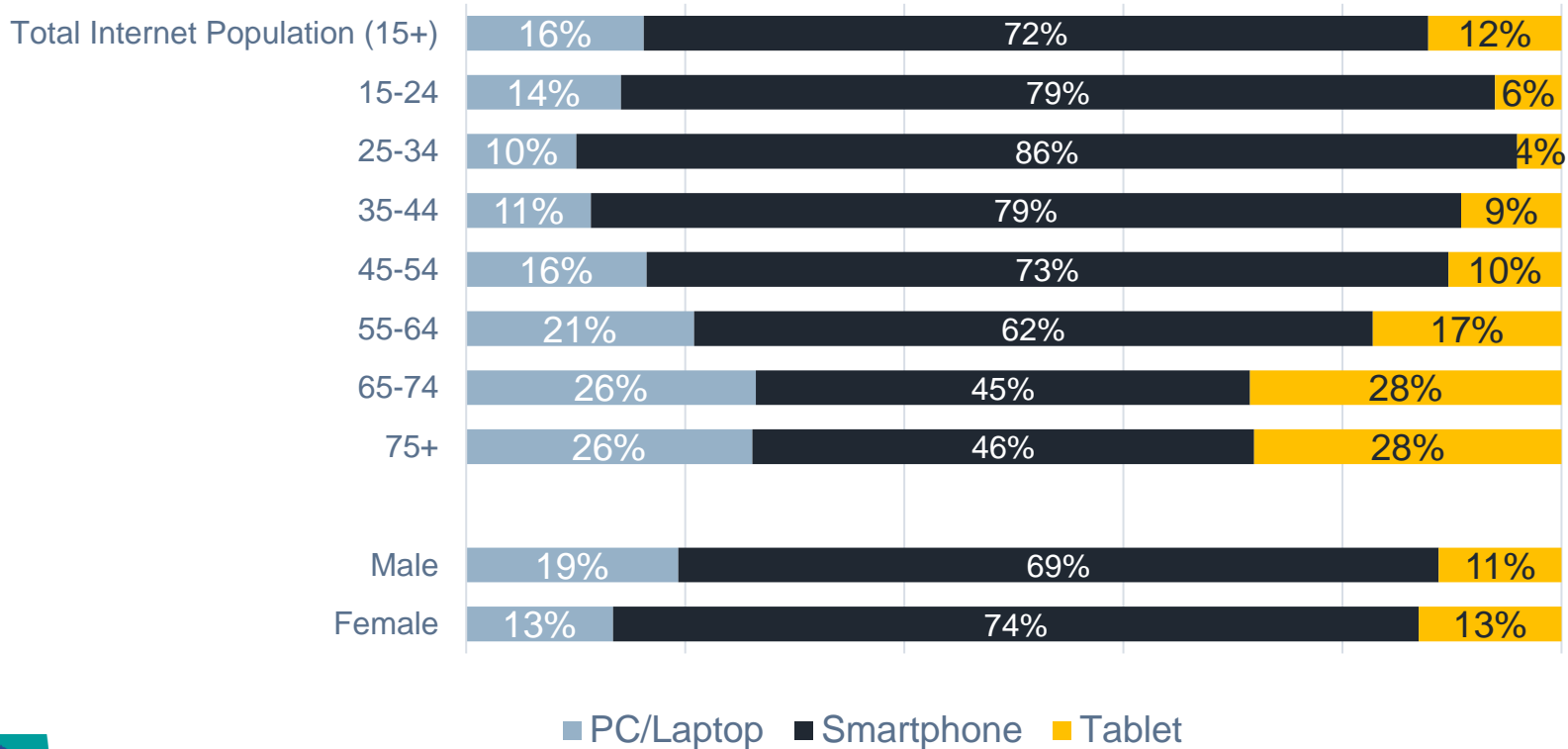
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	PC/Laptop	Smartphone	Tablet
Total Internet Population (15+)	16%	72%	12%
15-24	14%	79%	6%
25-34	10%	86%	4%
35-44	11%	79%	9%
45-54	16%	73%	10%
55-64	21%	62%	17%
65-74	26%	45%	28%
75+	26%	46%	28%
Male	19%	69%	11%
Female	13%	74%	13%

■ PC/Laptop ■ Smartphone ■ Tablet

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Device share of minutes by Fresco segment

Lifestage & Affluence impacts device usage– tablets are popular for the 'budgeting elderly' segment
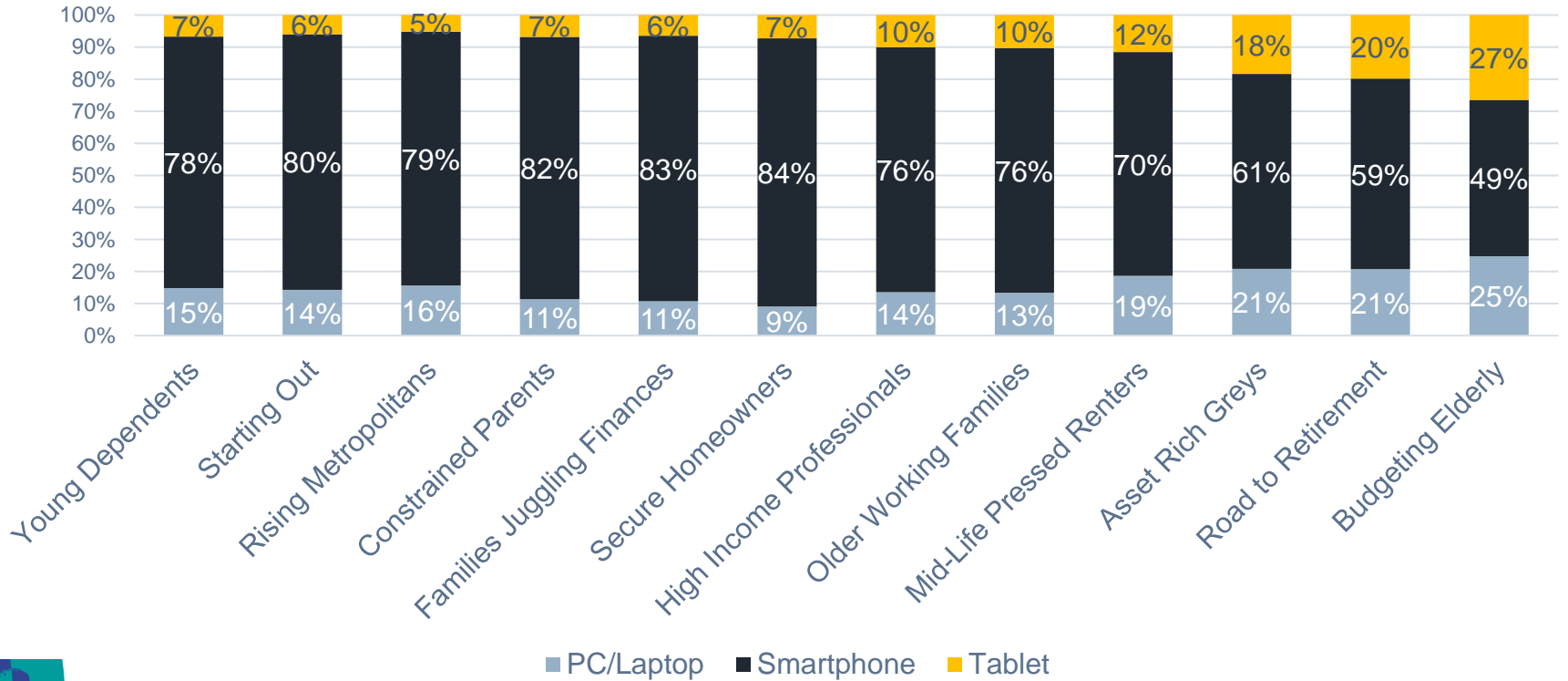
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Segment	PC/Laptop	Smartphone	Tablet
Young Dependents	15%	78%	7%
Starting Out	14%	80%	6%
Rising Metropolitans	16%	79%	5%
Constrained Parents	11%	82%	7%
Families Juggling Finances	11%	83%	6%
Secure Homeowners	9%	84%	7%
High Income Professionals	14%	76%	10%
Older Working Families	13%	76%	10%
Mid-Life Pressed Renters	19%	70%	12%
Asset Rich Greys	21%	61%	18%
Road to Retirement	21%	59%	20%
Budgeting Elderly	25%	49%	27%

■ PC/Laptop ■ Smartphone ■ Tablet

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Daypart share of minutes by device

Pcs are more likely to be used in the morning and afternoon.
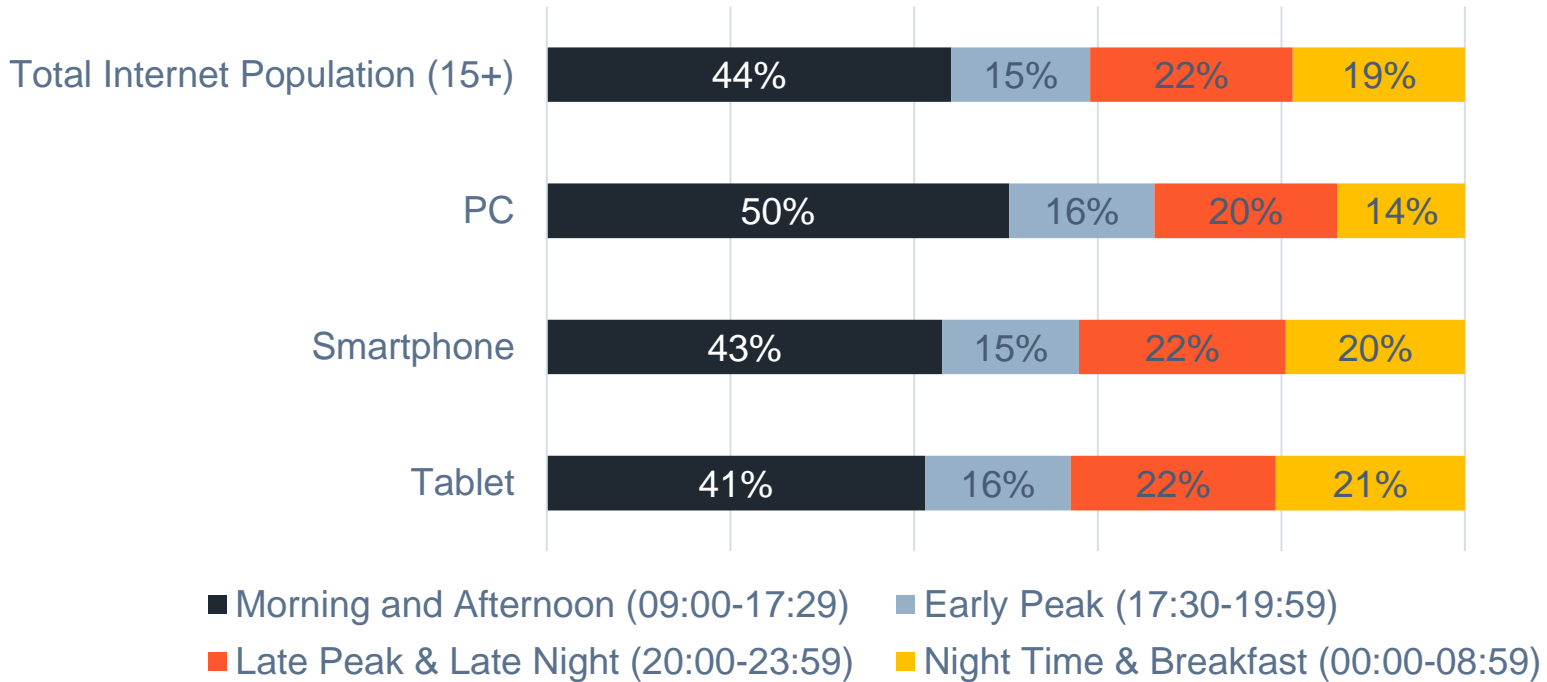
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Device	Morning and Afternoon (09:00-17:29)	Early Peak (17:30-19:59)	Late Peak & Late Night (20:00-23:59)	Night Time & Breakfast (00:00-08:59)
Total Internet Population (15+)	44%	15%	22%	19%
PC	50%	16%	20%	14%
Smartphone	43%	15%	22%	20%
Tablet	41%	16%	22%	21%

■ Morning and Afternoon (09:00-17:29)   ■ Early Peak (17:30-19:59)
■ Late Peak & Late Night (20:00-23:59)   ■ Night Time & Breakfast (00:00-08:59)

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Top organisations and brands

Top 20 organisations by audience

11 of the top 20 organisations with the largest UK online audiences are British companies
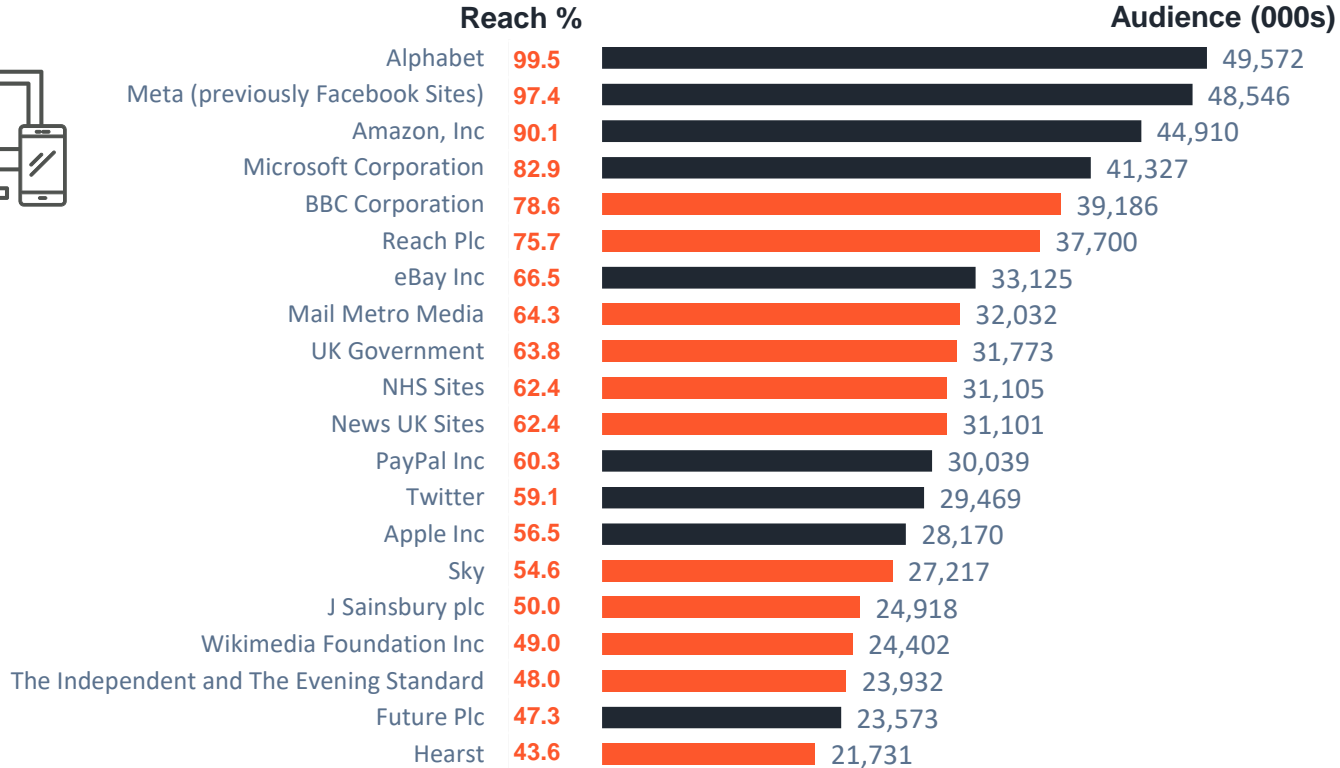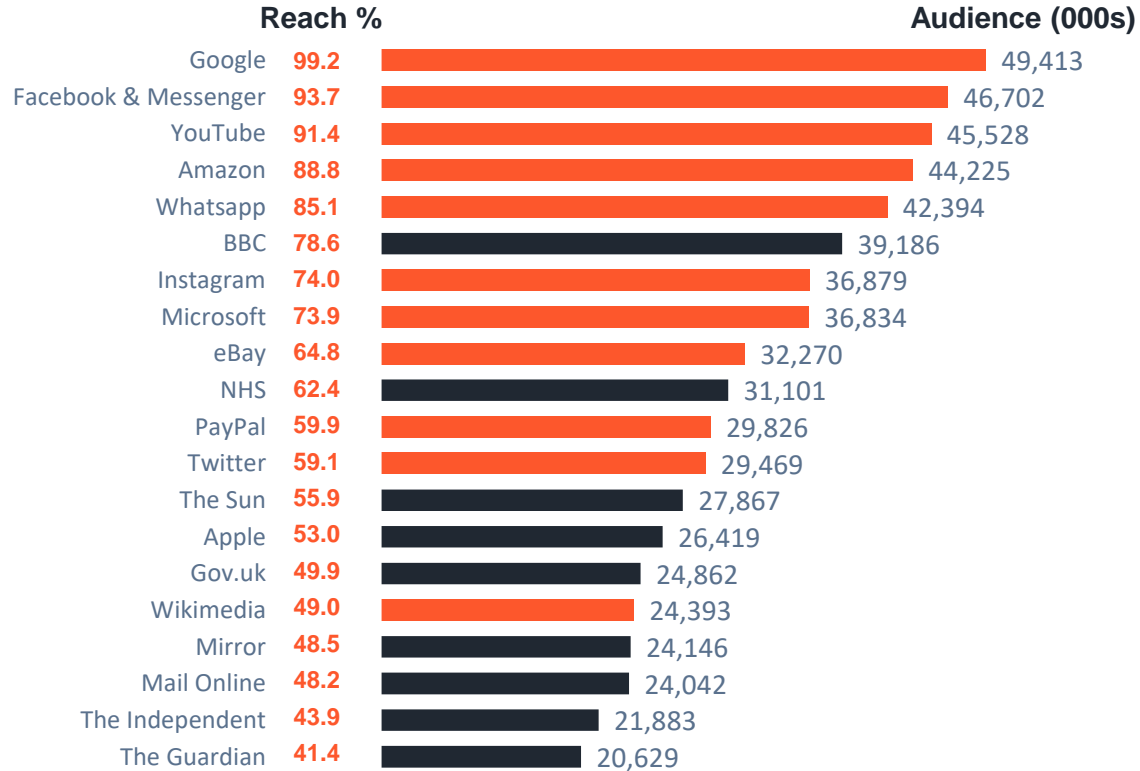
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	Reach %	Audience (000s)
Alphabet	99.5	49,572
Meta (previously Facebook Sites)	97.4	48,546
Amazon, Inc	90.1	44,910
Microsoft Corporation	82.9	41,327
BBC Corporation	78.6	39,186
Reach Plc	75.7	37,700
eBay Inc	66.5	33,125
Mail Metro Media	64.3	32,032
UK Government	63.8	31,773
NHS Sites	62.4	31,105
News UK Sites	62.4	31,101
PayPal Inc	60.3	30,039
Twitter	59.1	29,469
Apple Inc	56.5	28,170
Sky	54.6	27,217
J Sainsbury plc	50.0	24,918
Wikimedia Foundation Inc	49.0	24,402
The Independent and The Evening Standard	48.0	23,932
Future Plc	47.3	23,573
Hearst	43.6	21,731

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Top 20 online **brands** by audience

US global brands dominate the top 10

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Brand	Reach %	Audience (000s)
Google	99.2	49,413
Facebook & Messenger	93.7	46,702
YouTube	91.4	45,528
Amazon	88.8	44,225
Whatsapp	85.1	42,394
BBC	78.6	39,186
Instagram	74.0	36,879
Microsoft	73.9	36,834
eBay	64.8	32,270
NHS	62.4	31,101
PayPal	59.9	29,826
Twitter	59.1	29,469
The Sun	55.9	27,867
Apple	53.0	26,419
Gov.uk	49.9	24,862
Wikimedia	49.0	24,393
Mirror	48.5	24,146
Mail Online	48.2	24,042
The Independent	43.9	21,883
The Guardian	41.4	20,629

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Top 10 <u>organisations</u> by audience & minutes

Meta takes the no.1 spot ahead of Alphabet for Total minutes

UKOM

	Media	Audience (000s)	Audience Reach (%)
1	Alphabet	49,572	99.5
2	Meta (previously Facebook Sites)	48,546	97.4
3	Amazon, Inc	44,910	90.1
4	Microsoft Corporation	41,327	82.9
5	BBC Corporation	39,186	78.6
6	Reach Plc	37,700	75.7
7	eBay Inc	33,125	66.5
8	Mail Metro Media	32,032	64.3
9	UK Government	31,773	63.8
10	NHS Sites	31,105	62.4

	Media	Total Mins (MM)	Avg. Mins PP
1	Meta (previously Facebook Sites)	74,441	1533:25
2	Alphabet	56,145	1132:36
3	BBC Corporation	9,855	251:29
4	Amazon, Inc	8,397	186:59
5	Snap Inc	8,333	713:20
6	*Bytedance Inc.	8,172	446:03
7	Microsoft Corporation	7,129	172:30
8	Twitter	4,783	162:19
9	Netflix Inc	3,892	241:19
10	eBay Inc	3,272	98:47

Top 10 <u>brands</u> by audience & minutes

Social media brands dominate the top 10 for time

UKOM

	Media	Audience (000s)	Audience Reach (%)
1	Google	49,413	99.2
2	Facebook & Messenger	46,702	93.7
3	YouTube	45,528	91.4
4	Amazon	44,225	88.8
5	Whatsapp	42,394	85.1
6	BBC	39,186	78.6
7	Instagram	36,879	74.0
8	Microsoft	36,834	73.9
9	eBay	32,270	64.8
10	NHS	31,101	62.4

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook & Messenger	50,416	1079:31
2	YouTube	30,440	668:36
3	Google	25,705	520:12
4	Instagram	13,081	354:42
5	Whatsapp	10,927	257:46
6	BBC	9,855	251:29
7	Snapchat	8,330	732:37
8	*TikTok	8,164	445:44
9	Amazon	7,384	166:57
10	Microsoft	5,425	147:17

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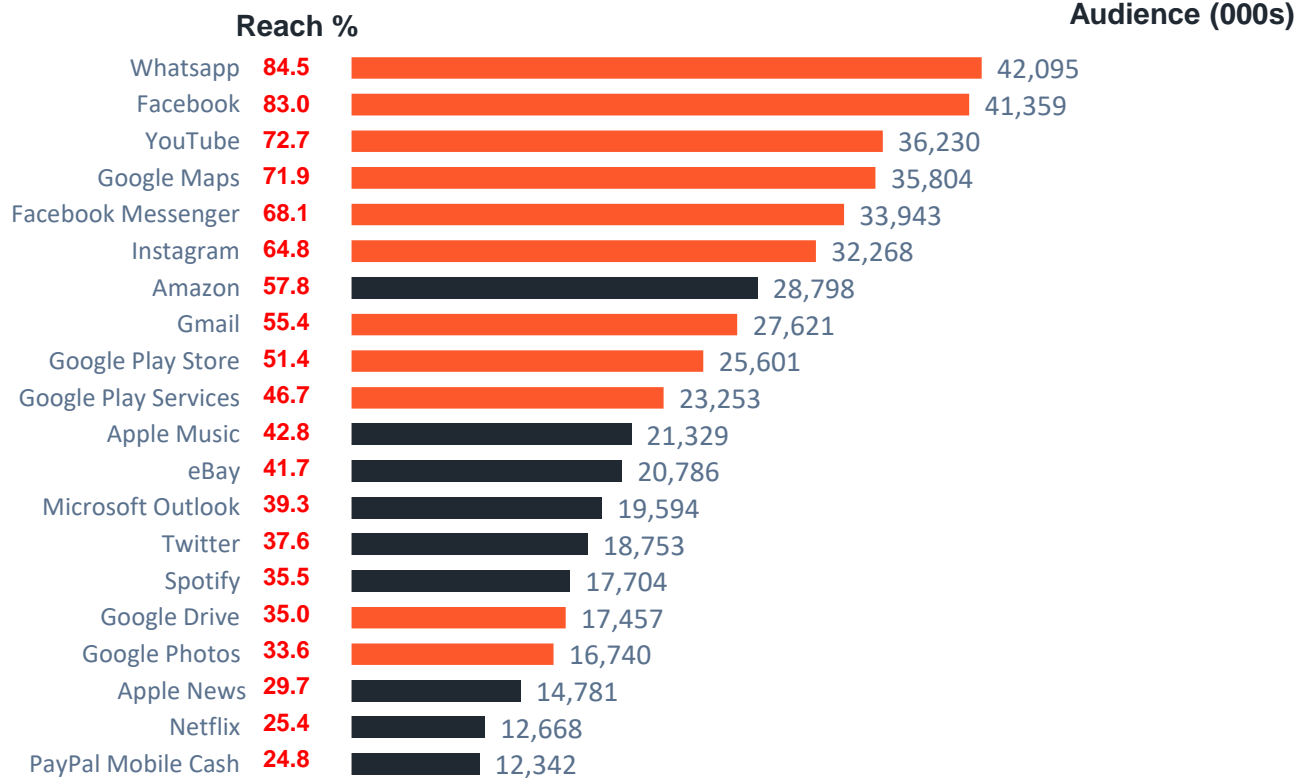# Top mobile apps

Top 20 mobile apps by audience

9 of the top 10 'Audience' apps are from Google or Meta (Facebook)

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Reach %   **Audience (000s)**

App	Reach %	Audience (000s)
Whatsapp	84.5	42,095
Facebook	83.0	41,359
YouTube	72.7	36,230
Google Maps	71.9	35,804
Facebook Messenger	68.1	33,943
Instagram	64.8	32,268
Amazon	57.8	28,798
Gmail	55.4	27,621
Google Play Store	51.4	25,601
Google Play Services	46.7	23,253
Apple Music	42.8	21,329
eBay	41.7	20,786
Microsoft Outlook	39.3	19,594
Twitter	37.6	18,753
Spotify	35.5	17,704
Google Drive	35.0	17,457
Google Photos	33.6	16,740
Apple News	29.7	14,781
Netflix	25.4	12,668
PayPal Mobile Cash	24.8	12,342

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

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

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Top 10 mobile apps by audience & minutes

High 'time per person' propels TikTok and Snapchat into the top 10 for total app minutes

UKOM

	Media	Audience (000S)	Audience Reach (%)
1	Whatsapp	42,095	84.5
2	Facebook	41,359	83.0
3	YouTube	36,230	72.7
4	Google Maps	35,804	71.9
5	Facebook Messenger	33,943	68.1
6	Instagram	32,268	64.8
7	Amazon	28,798	57.8
8	Gmail	27,621	55.4
9	Google Play Store	25,601	51.4
10	Google Play Services	23,253	46.7

	Media	Total Mins (MM)	Avg. Mins PP
1	Facebook	43,906	1061:34
2	YouTube	22,300	615:31
3	Instagram	12,823	397:24
4	Whatsapp	10,807	256:44
5	Snapchat	8,304	737:50
6	*TikTok	8,081	675:05
7	Google Maps	4,624	129:09
8	Gmail	4,044	146:24
9	Twitter	3,332	177:41
10	Netflix	2,883	227:37

Top 10 apps by minutes by mobile device

A majority of the smartphone top 10 are social apps but video apps ranks highly for tablet time.

UKOM

Smartphone Top 10

	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	37,110	920:52
2	YouTube	16,569	482:06
3	Instagram	12,351	395:07
4	Whatsapp	10,690	254:47
5	Snapchat	8,274	737:05
6	*TikTok	7,938	678:53
7	Google Maps	4,430	126:11
8	Gmail	3,438	127:57
9	Twitter	3,199	175:09
10	Facebook Messenger	2,692	80:52

Tablet Top 10

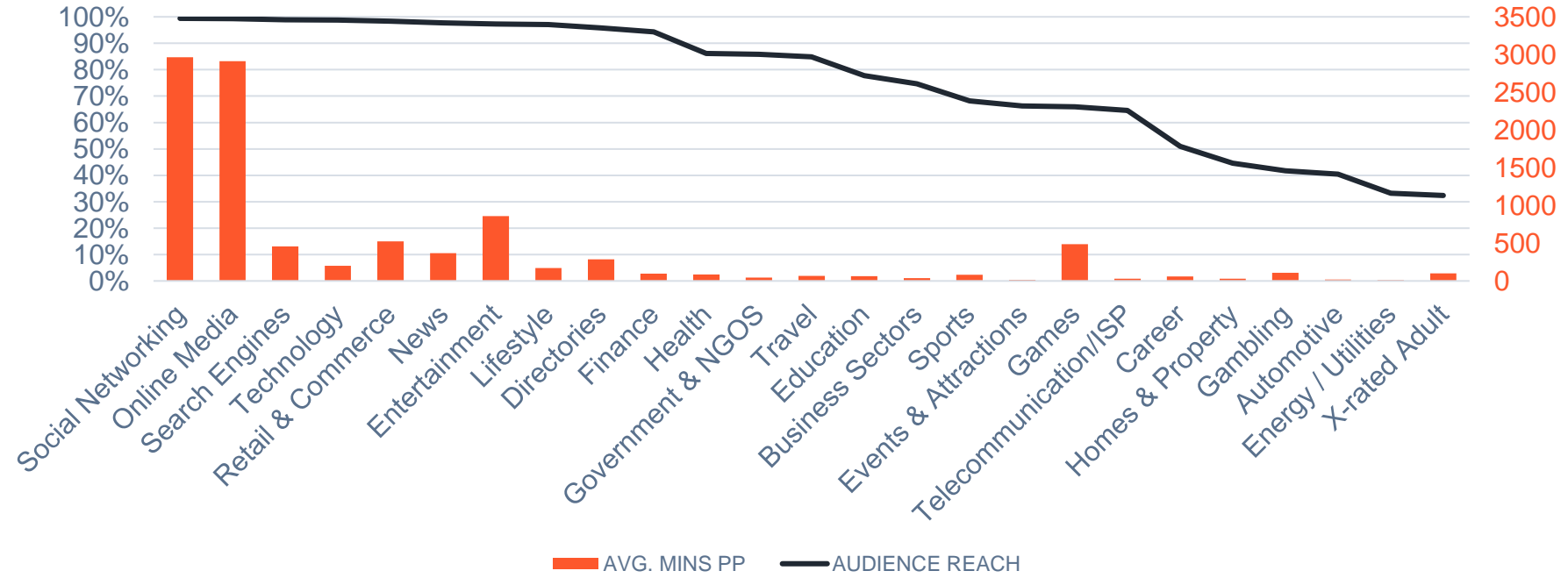|	MEDIA	TOTAL MINS (MM)	AVG. MINS PP
1	Facebook	6,796	929:24
2	YouTube	5,732	1024:46
3	Netflix	1,076	461:52
4	BBC iPlayer	862	402:47
5	Gmail	606	196:37
6	Yahoo Mail	506	838:26
7	YouTube Kids	496	1746:38
8	Instagram	472	158:27
9	BBC Sounds	425	400:10
10	BBC News	418	221:44

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Category Comparisons

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

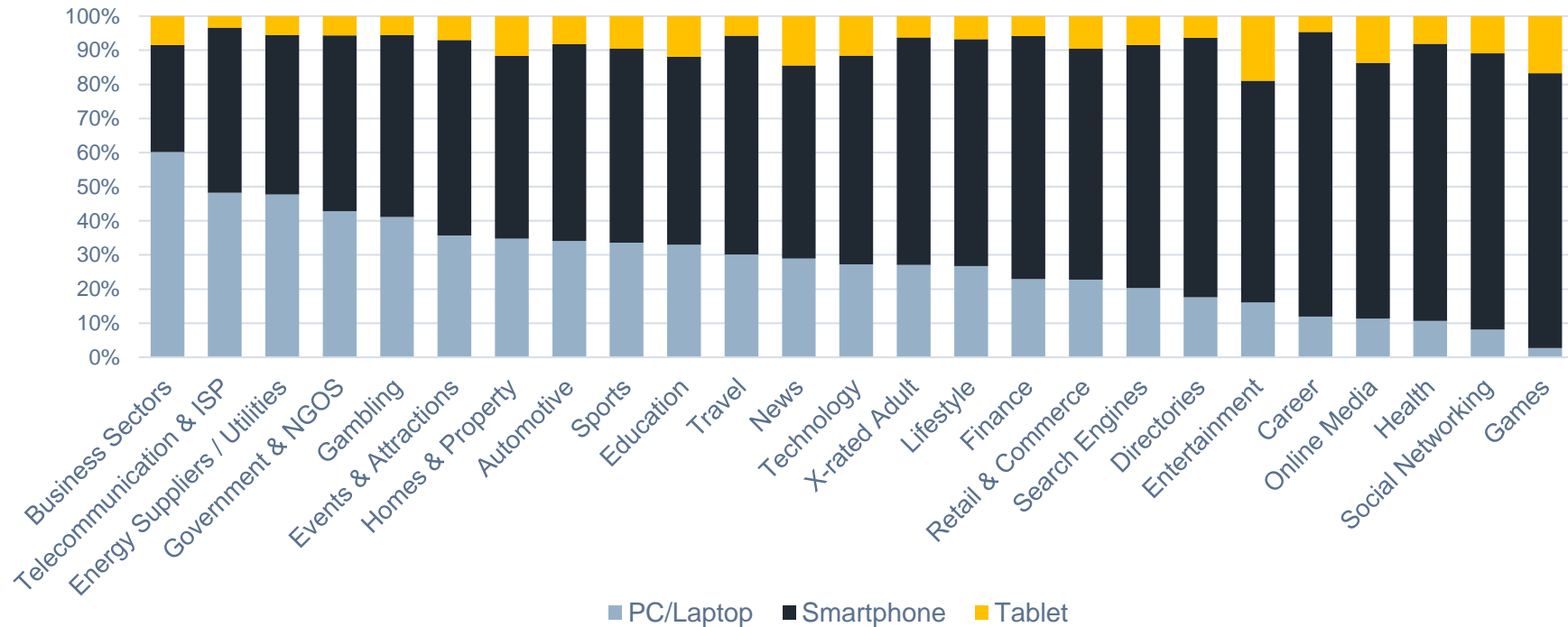Social networking = high reach & high engagement. Gaming = low reach, high engagement.

UKOM

Reach

Ave mins

AVG. MINS PP — AUDIENCE REACH

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Share of minutes by device by tier 1 category

Content type significantly influences choice of device.

Legend: PC/Laptop, Smartphone, Tablet

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

Utilities, telecoms and finance during the day; Entertainment, events & gaming in the evening.
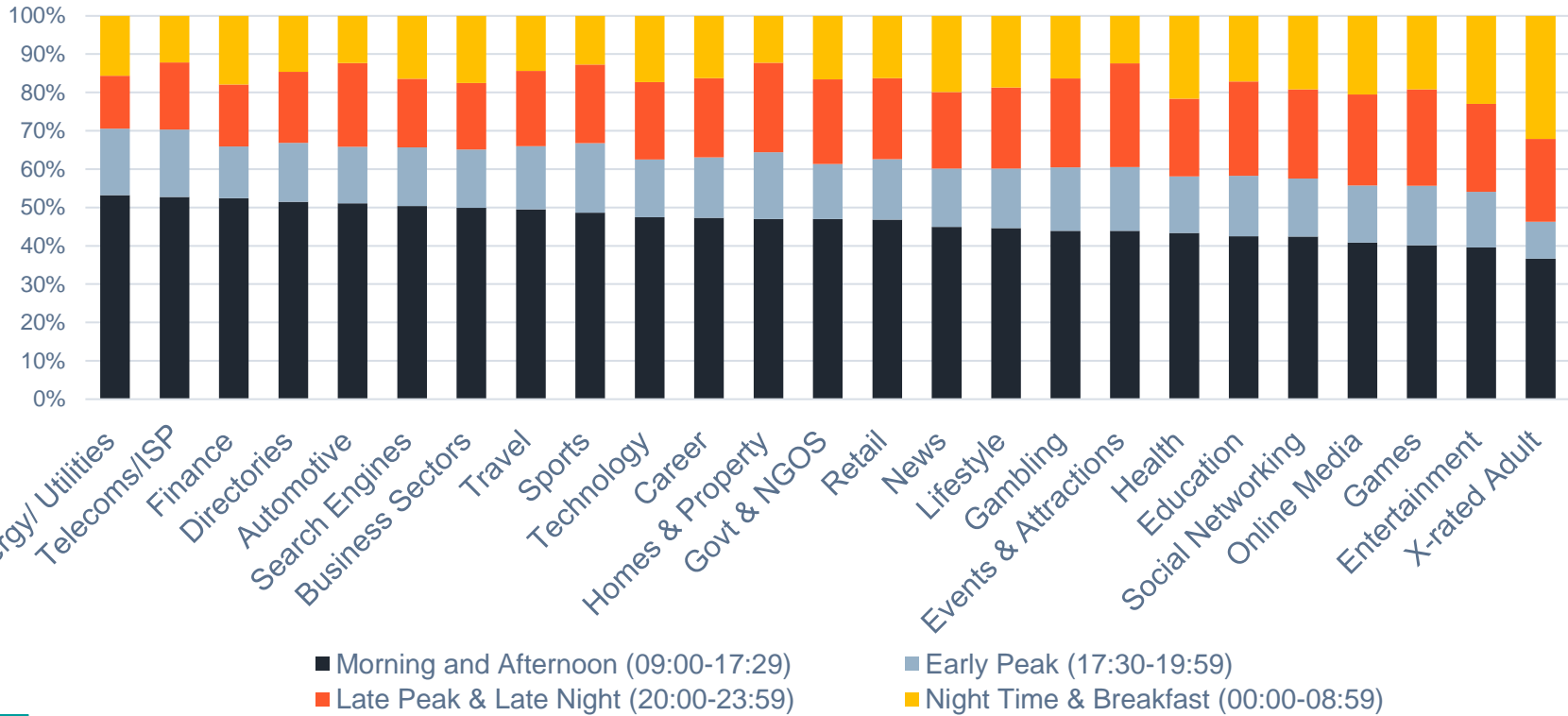
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Legend:
- Morning and Afternoon (09:00-17:29)
- Early Peak (17:30-19:59)
- Late Peak & Late Night (20:00-23:59)
- Night Time & Breakfast (00:00-08:59)

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Tier 1 category audience change (000s): May-July 22

The Women's Euros, Wimbledon & Birmingham 2022 contributed to the increase in Sports
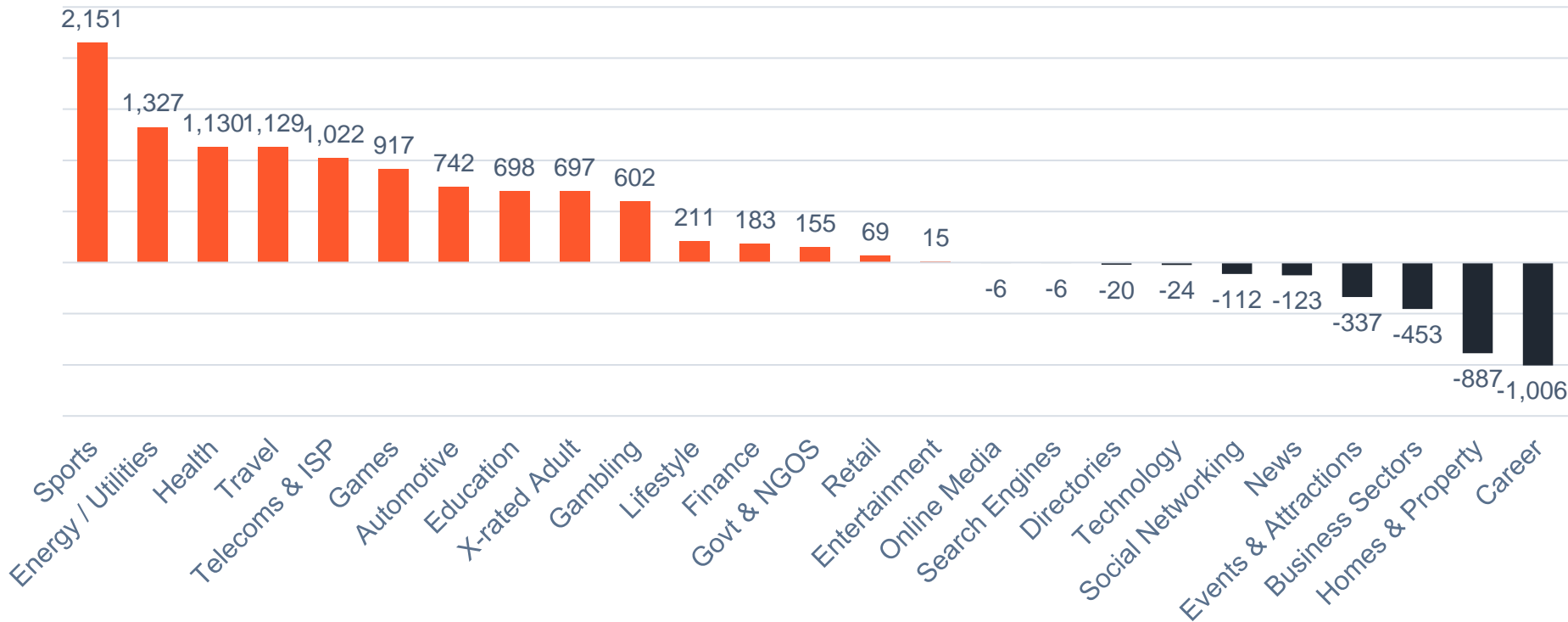
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| Category	Change
Sports	2,151
Energy / Utilities	1,327
Health	1,130
Travel	1,129
Telecoms & ISP	1,022
Games	917
Automotive	742
Education	698
X-rated Adult	697
Gambling	602
Lifestyle	211
Finance	183
Govt & NGOS	155
Retail	69
Entertainment	15
Online Media	-6
Search Engines	-6
Directories	-20
Technology	-24
Social Networking	-112
News	-123
Events & Attractions	-337
Business Sectors	-453
Homes & Property	-887
Career	-1,006

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In the News

Top banking brands by online reach among students aged 18-24 in full-time education

Audience Affinity Index
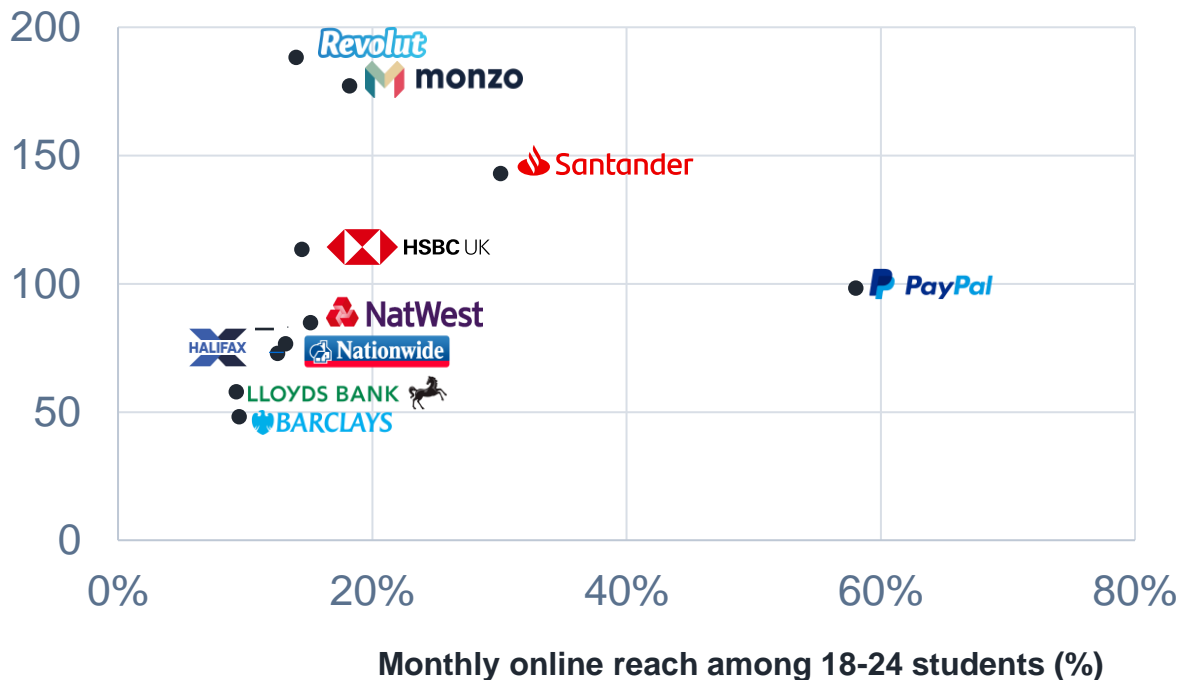
- **18-24 students are more likely than average to visit digital only brands Revolut and Monzo**
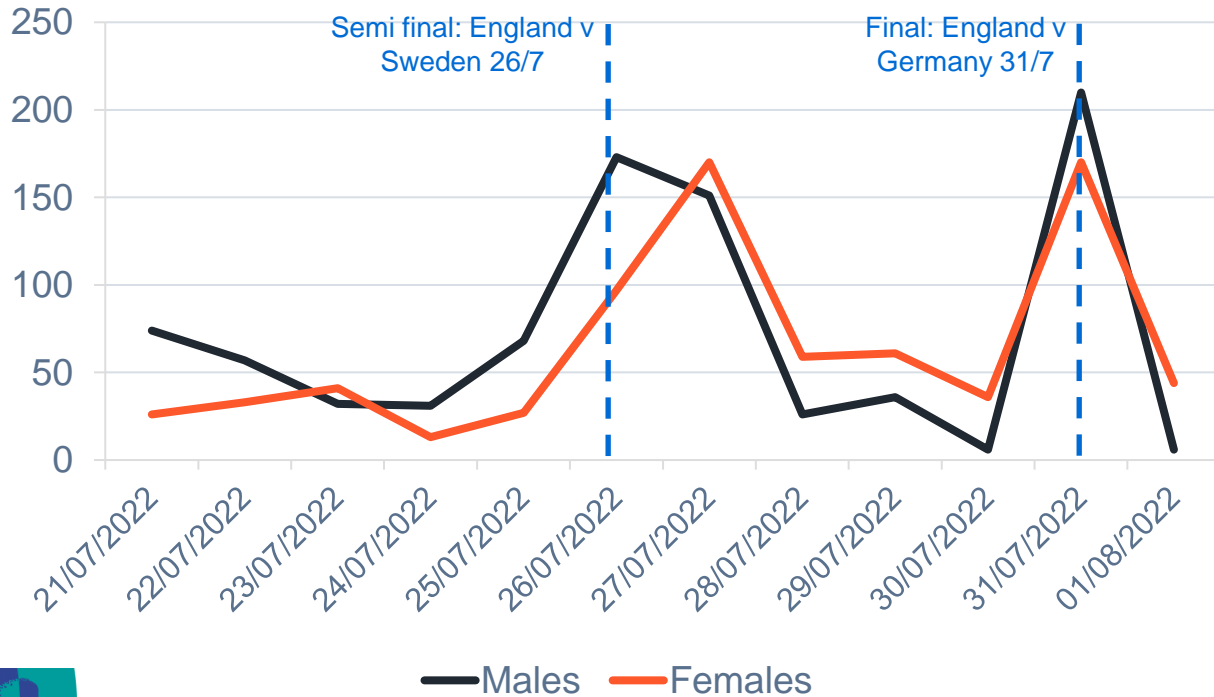
Monthly online reach among 18-24 students (%)

Audience to UEFA's website during the women's Euros Semi-Final and Final in 2022

UEFA Website Audience (000s) Women's Euros 2022

Semi final: England v Sweden 26/7

Final: England v Germany 31/7

— Males — Females

- **The day after the Sweden match and during the days running up to the final, more females than males visited the site**

England 2-1 Germany (aet): Kelly gives Lionesses Wembley final triumph

Sunday 31 July 2022

Hosts England sent a record 87,192 Wembley crowd into dreamland as they won their first major title by beating Germany in extra time.

Audience to SVOD <u>mobile apps</u> between January and July

UKOM

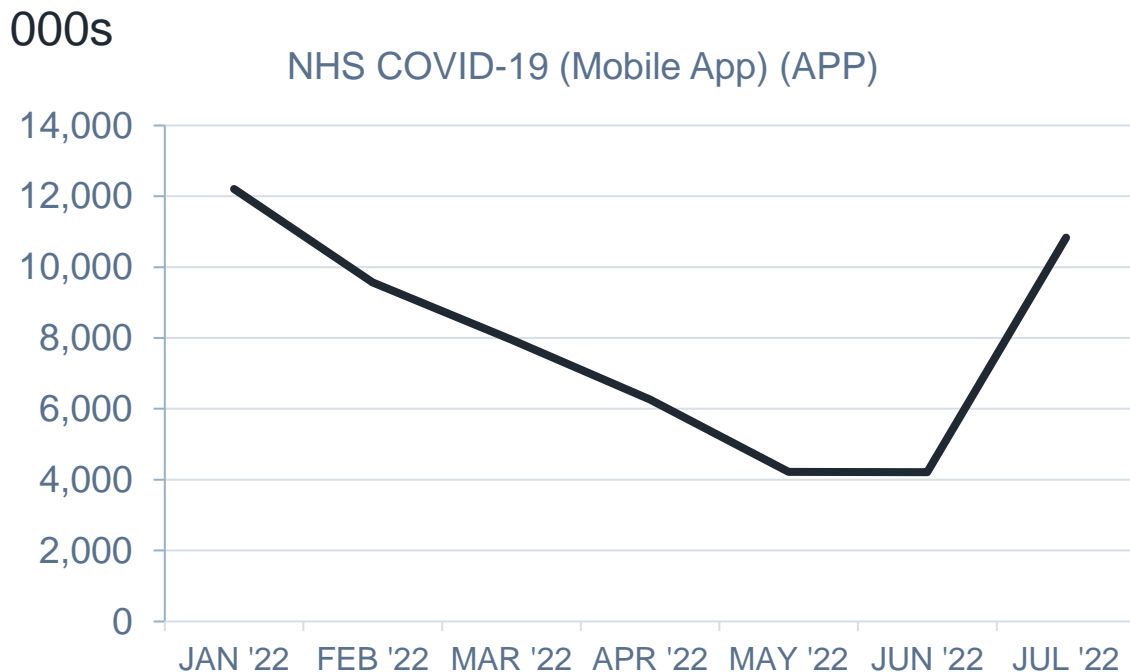|	AUDIENCE (000S)			
	JAN '22	JUL '22	Change (%)	Change (abs)
SVOD Mobile Apps	20,992	20,093	-4.3 %↓	-899
Netflix	13,562	12,668	-6.6 %↓	-895
Amazon Prime Video	6,868	6,512	-5.2 %↓	-356
Disney	3,600	4,634	28.7 %↑	1,034
NOW TV	1,479	1,243	-16.0 %↓	-236
BT Sport	1,312	555	-57.7 %↓	-757
Apple TV	1,035	533	-48.5 %↓	-503
discovery+	435	353	-18.8 %↓	-82
BritBox	337	296	-12.1 %↓	-41

- **In July, overall audiences were down for most subscription TV on demand mobile apps between January and July 2022 with the exception of Disney.**

Mirror

Stranger Things has been a huge success for Netflix (📷 Image: Netflix)

NEWS · POLITICS · FOOTBALL · CELEBS · TV · MONEY · TRAVEL

Thousands cancel Netflix or Prime Video as UK cost of living crisis bites harder

Rise in energy prices seen as the 'catalyst' as nearly 800,000 UK households ended their subscriptions in April–June – but some streamers such as Disney Plus are still doing well

By **Paul Speed**, Online Reporter
12:18, 5 Aug 2022

COMMENTS

Almost 800,000 of us in the UK have now cancelled our subscriptions to either **Netflix** or **Amazon Prime Video** – as the cost of living crisis continues to squeeze our cash.

Ipsos

Audience to the NHS Covid-19 App: Jan-July

000s

NHS COVID-19 (Mobile App) (APP)

- **As cases rose in July, visitors to the NHS Covid-19 app increased.**

Top 5 energy brands online by audience

Scotland

		000s
1	British Gas	328
2	Scottish Power	254
3	Octopus Energy	196
4	EDF Energy	174
5	SSE	132

Wales

		000s
1	E.ON	175
2	British Gas	168
3	Scottish Power	113
4	Octopus Energy	112
5	OVO Energy	92
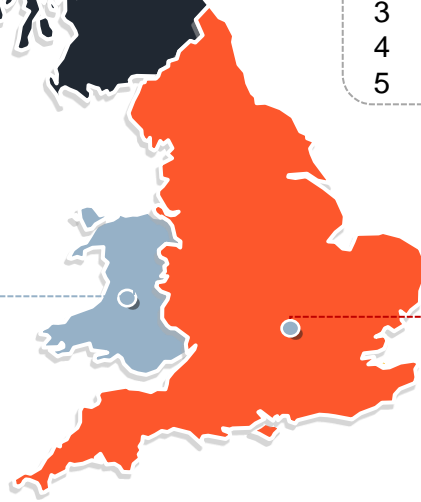
England

		000s
1	British Gas	3,343
2	Octopus Energy	2,194
3	E.ON	2,069
4	EDF Energy	1,895
5	Shell	1,717

- **British Gas is in the top 2 for all GB nations**

BBC NEWS

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British Gas boosts support to help cut energy costs

By Daniel Thomas
Business reporter, BBC News

25 August

Russia-Ukraine war

GETTY IMAGES

British Gas is to donate 10% of its profits to help customers cope with soaring bills for the "duration of the energy crisis".
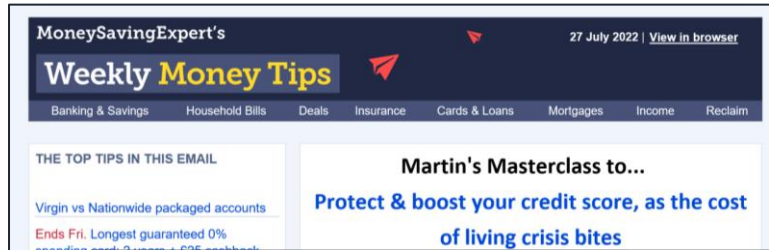
Weekly money saving tips from Martin Lewis drive audiences to Money Saving Expert

Audience(000s)
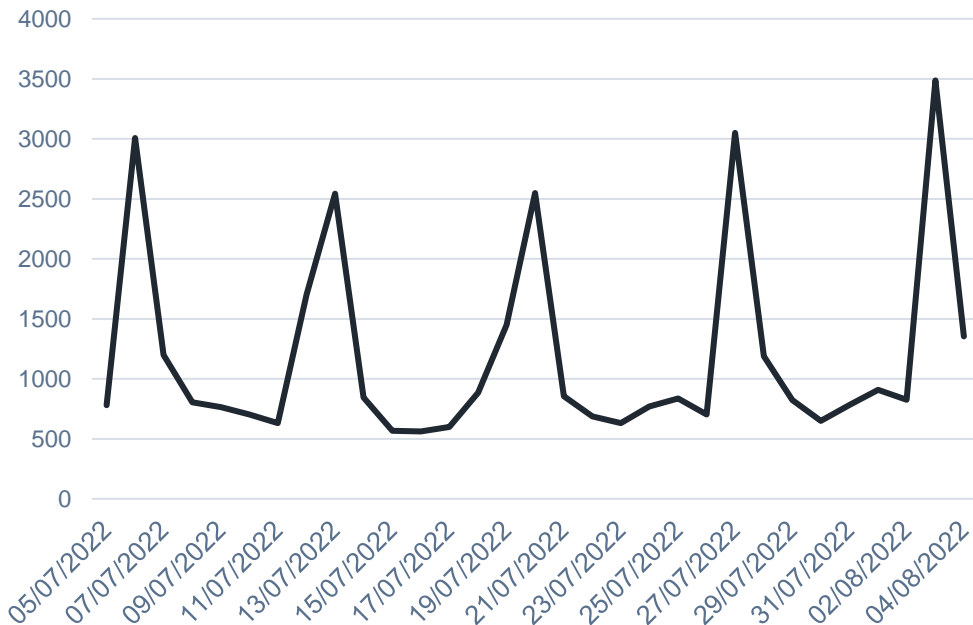
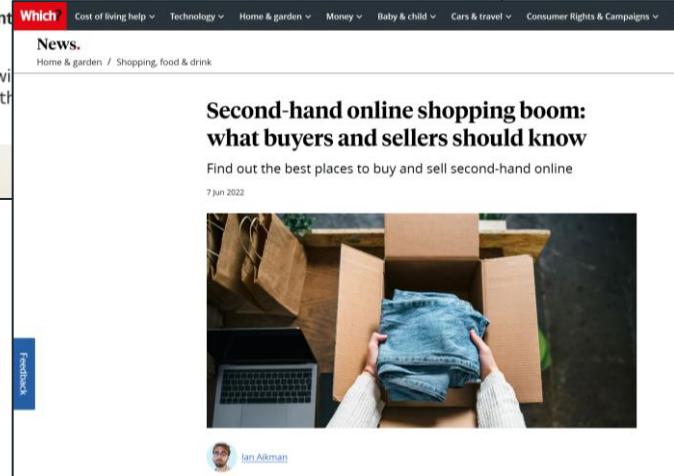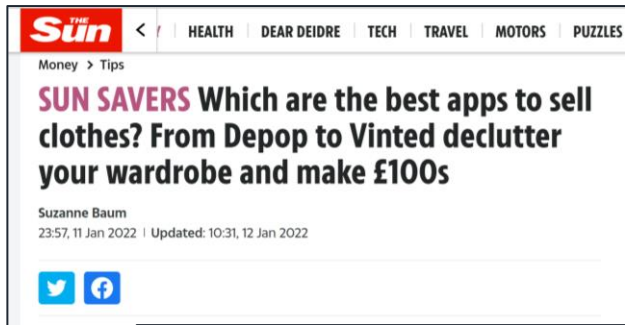- **The money tips email and media appearances from Martin drive audience to the MSE site**

'Pre-loved' apps and sites like Vinted are growing in popularity

Vinted AUDIENCE (000S)			
JAN '22	JUL '22	Change (%)	Change (abs)
4,122	5,245	27.2 %↑	1,123

Top indexing fashion retailers* among those who agree 'Celebrities influence my purchase decisions'

UKOM

MEDIA	AUDIENCE (000s)	AUDIENCE AFFINITY INDEX
Na-Kd	52	606
Ohpolly	54	591
Abercrombie	50	529
Vestiaire Collective	56	378
Surfdome	49	302
Accessorize	58	299
The North Face	49	289
Urban Outfitters	121	287
Isawitfirst	82	285
Missguided	91	270

- **Fashion brands index highly for those who agree their purchases are influenced by celebrity**

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Film Music **TV & radio** Books Art & design Stage Games Classical

Love Island

⊙ This article is more than 1 month old

Love Island winner Ekin-Su signs £1m deal with fashion brand Oh Polly

Deal reported to be biggest in show's history, as brand's sustainability claims called into question

Lauren Cochrane

Fri 12 Aug 2022 15.37 BST

📷 Ekin-Su Cülcüloğlu and Davide Sanclimenti, the winners of this year's Love Island. Photograph: REX/Shutterstock

The Love Island winner Ekin-Su Cülcüloğlu has signed a deal to work with

Ipsos

Source: UKOM Ipsos iris Online Audience Measurement Service, July 2022

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month * Based on top 50 fashion retailer brands by audience

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 find at: https://ukom.uk.net/ipsos-iris-overview.php
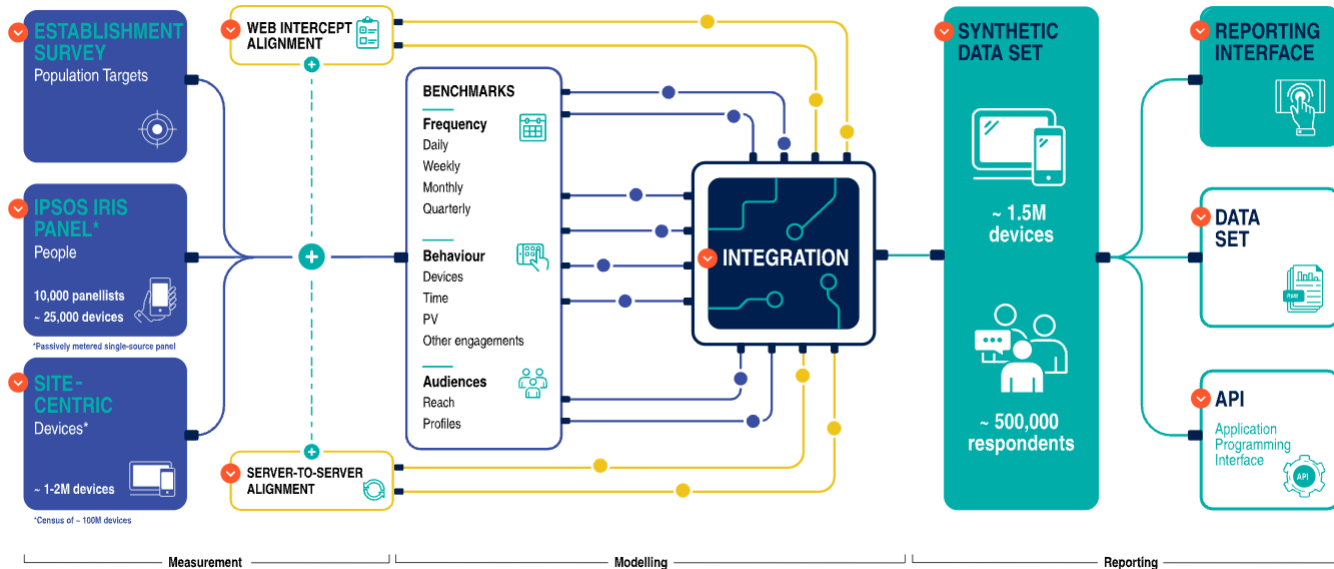
About UKOM

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/