

UKOM

**Digital Market
Overview**

January 2022



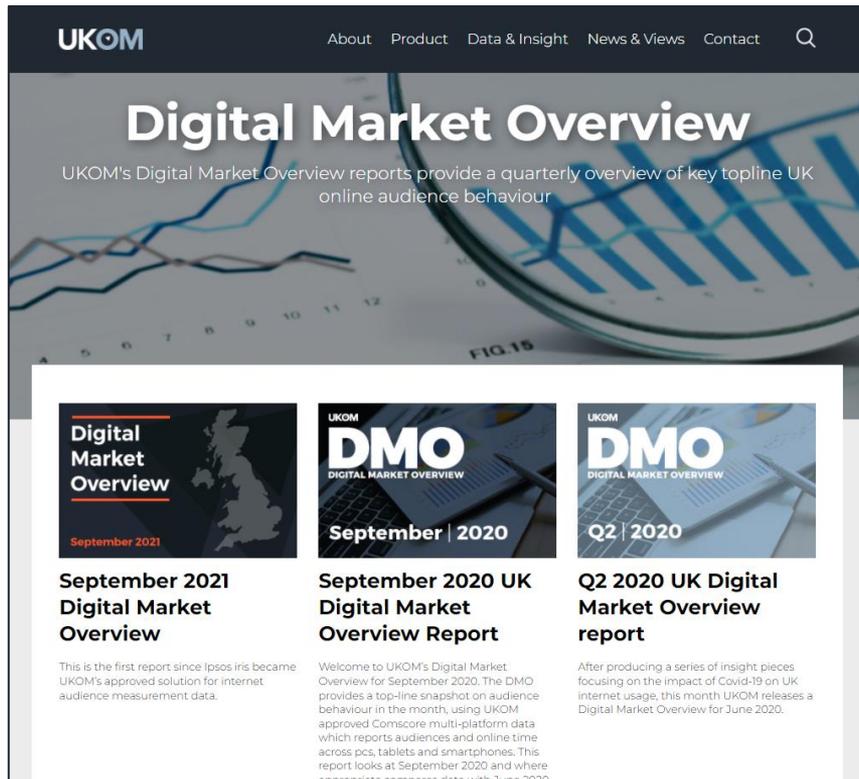
The UK Digital Market Overview January 2022



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

Ipsos iris launched in January 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.



Methodology Updates: January 2022



- **Universe update:** The new total internet population 15+ has been updated to bring it in line with the latest PAMCo 2021 survey estimates. The total universe size (internet users aged 15+) has increased from 49,888,066 to 49,934,339 in January data.
- **Embedded browser traffic:** As of January 2022, monthly data also includes webpages consumed within other mobile app embedded browsers, such as LinkedIn, Twitter, Google News and Instagram, to align panel observations with census tag collection.
- **SEG profile update:** A new method has been applied in the fusion between census and panel in order to enhance social grade profile.
- **Other Internet category update:** Desktop apps have been removed from 'other internet' category resulting in a c.35% decrease in total internet 15+ population MINS/time spent.
- **Server Interruption on 29th and 31st January:** There was a server interruption which impacted full gathering of the tagging data which took place between 9:40 to 11:25 pm GMT on 29th January and 00:50 to 8:50 am on 31st of January. The data has been re-modelled for the period where the interruption was happening and is included in the final monthly data release.

Given the universe profile and embedded browser update Ipsos advise against trending the January 2022 Ipsos iris data with previous months of data.

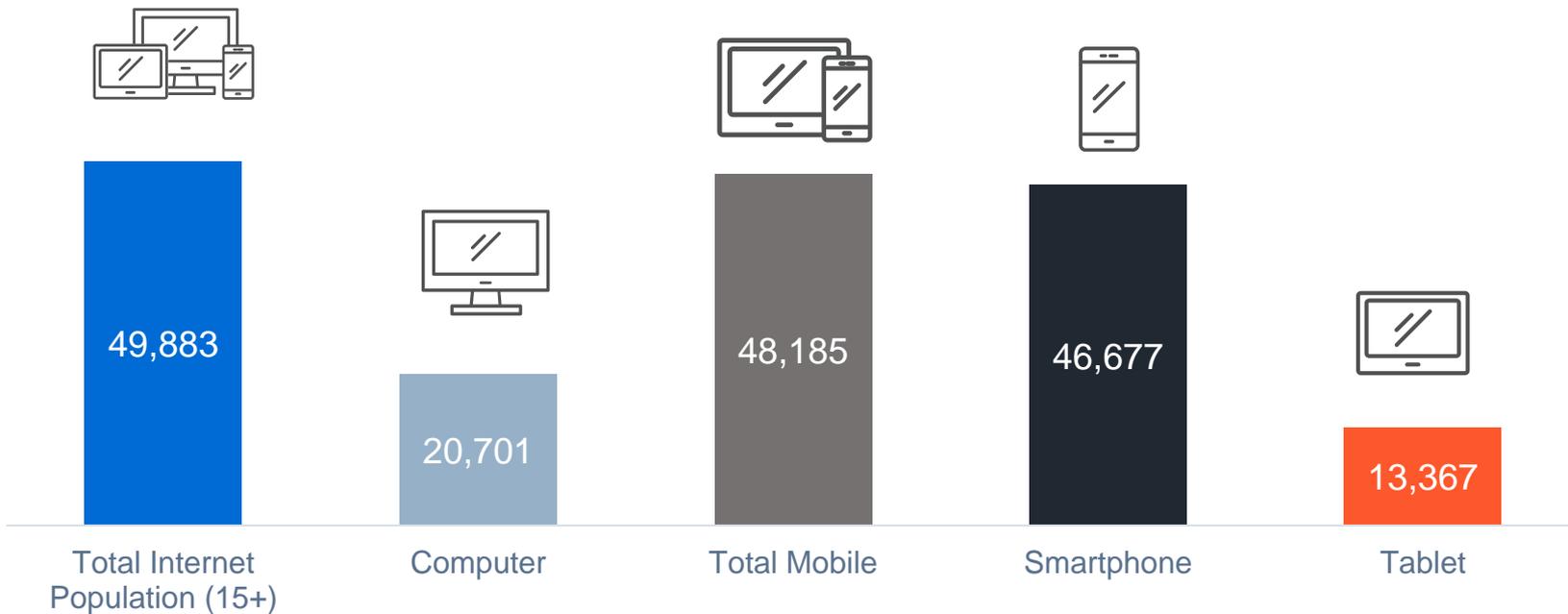


Audience by device



Online audience by device (000s)

More than twice as many people use smartphones than computers



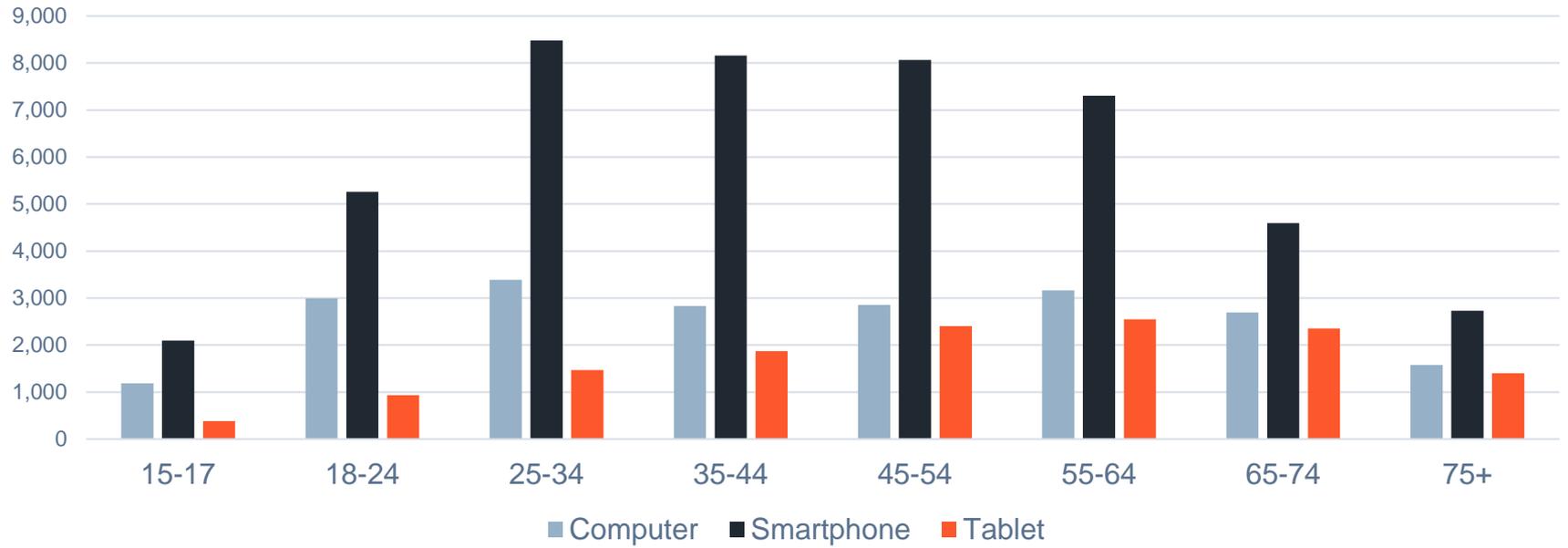
Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022

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



Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

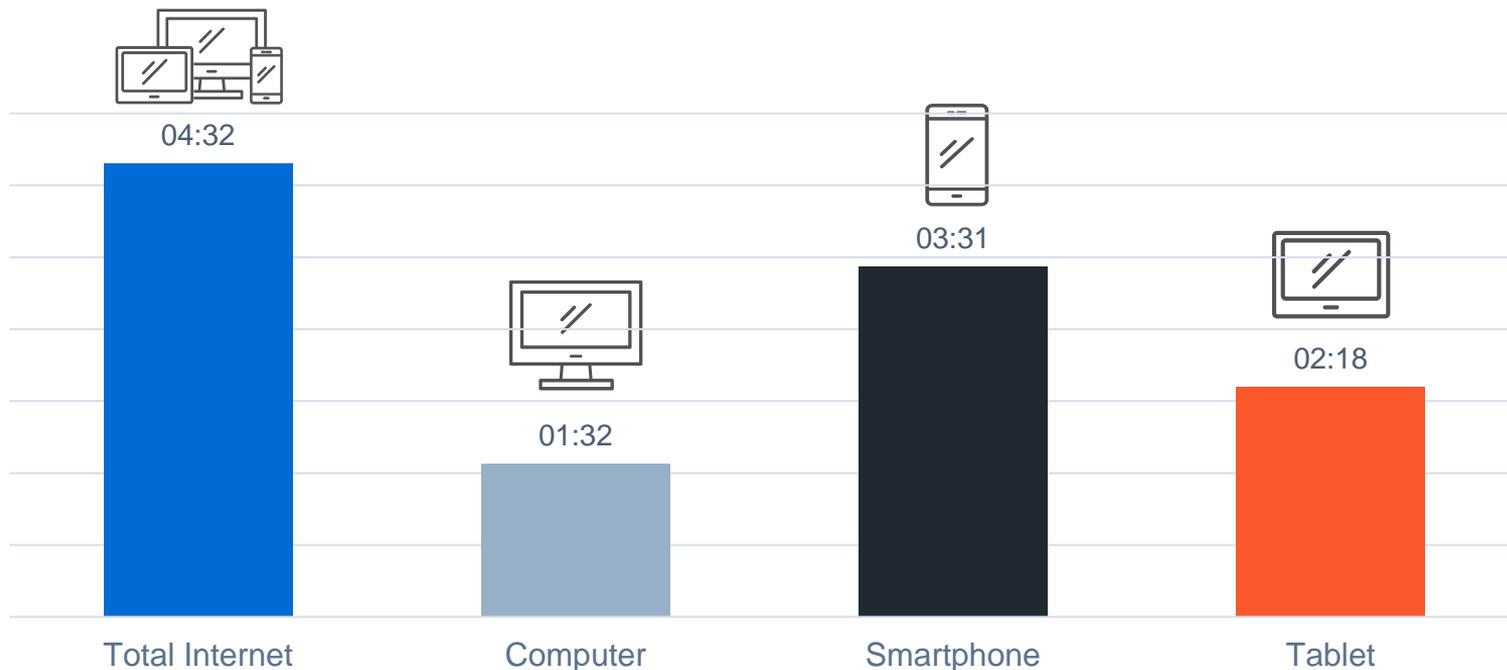
Time online



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



Smartphone users drive time online - they spend on average over 3.5 hrs a day using their device

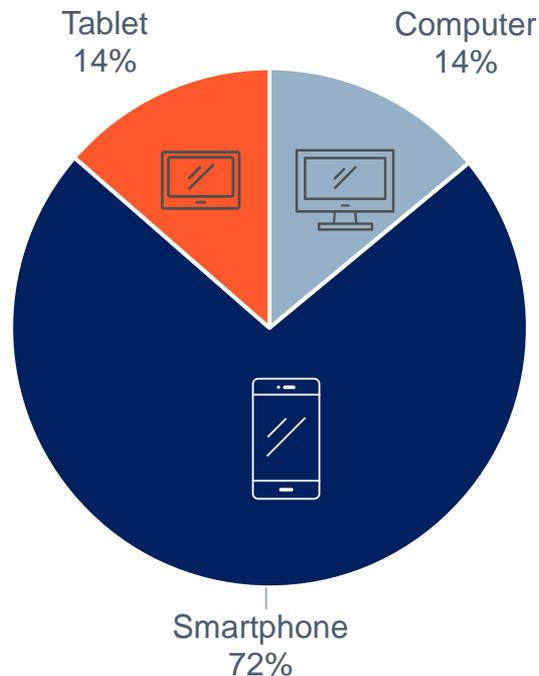


Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022

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

Share of minutes by device

Smartphones account for 72% of time online



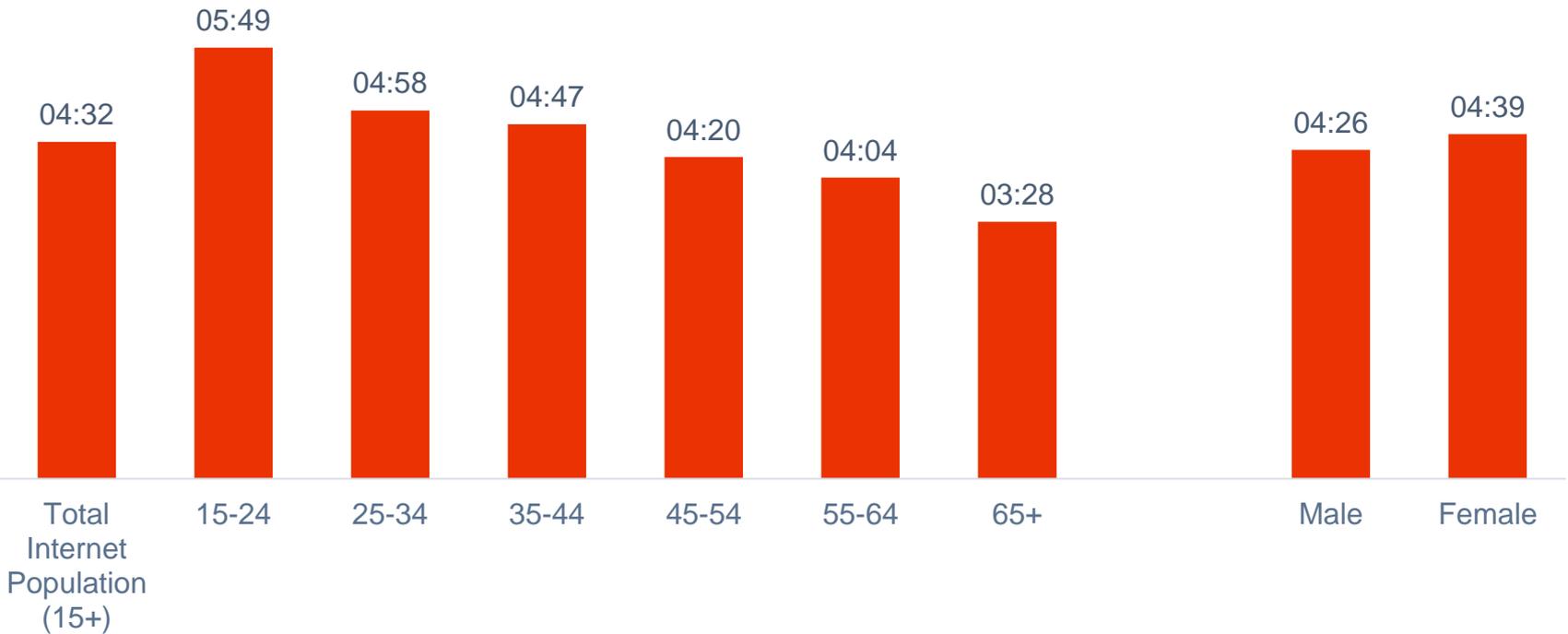
Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022

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

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



Younger audiences spend most time online

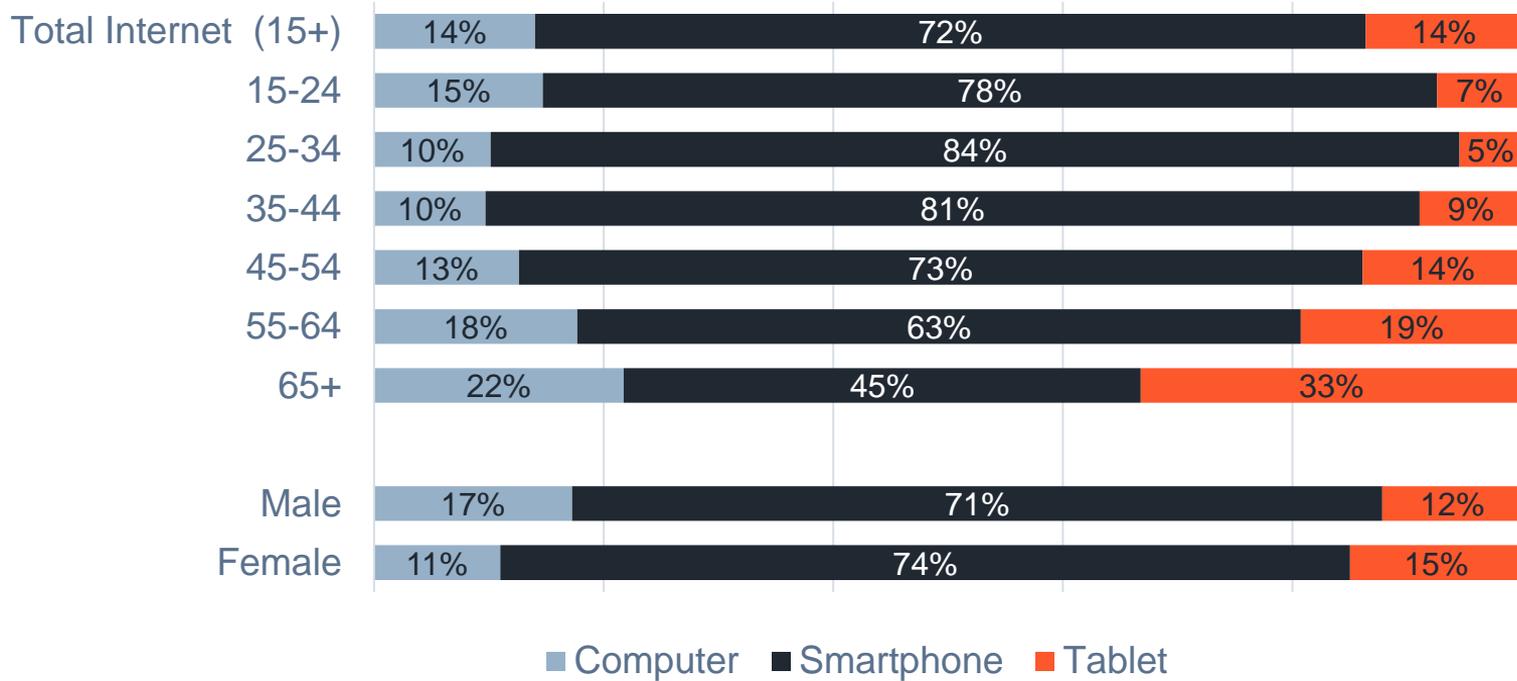


Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

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, January 2022

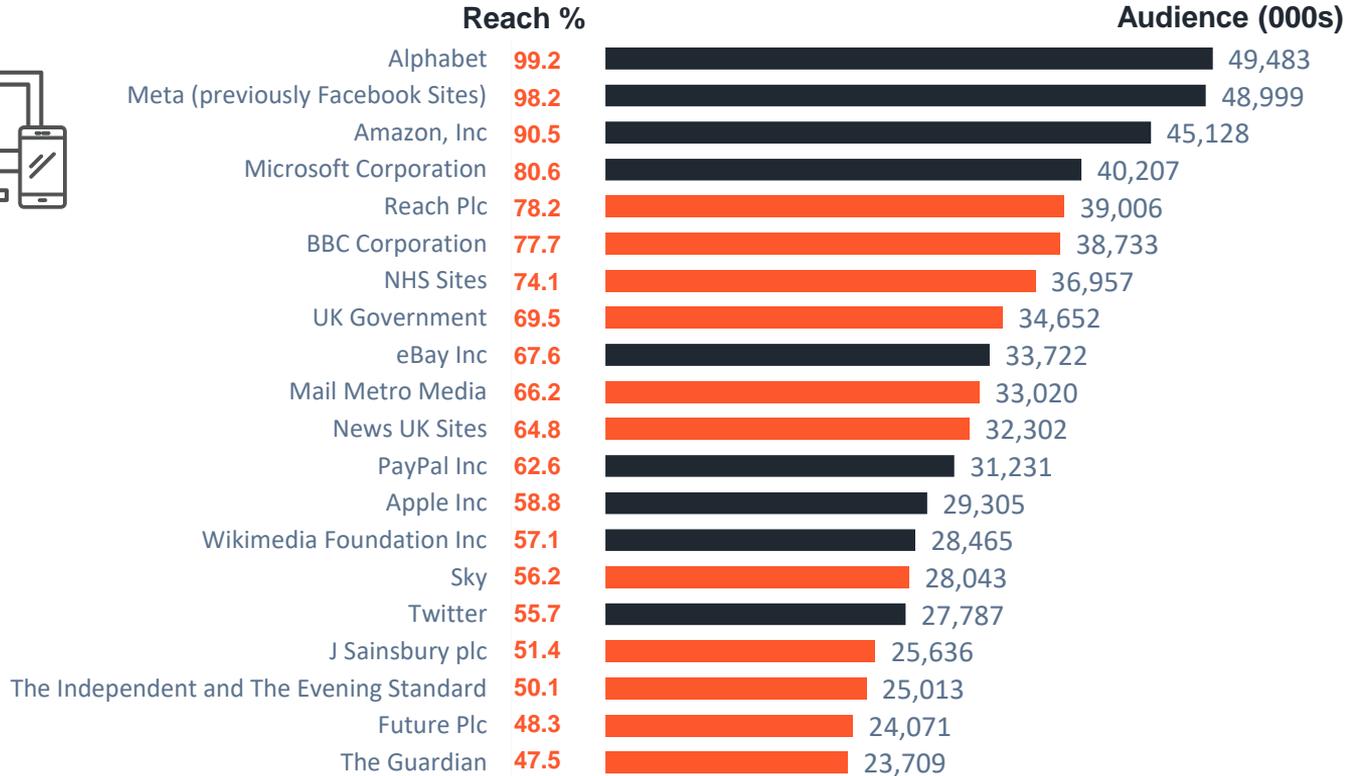
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month

Top organisations and brands



Top 20 organisations by audience

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



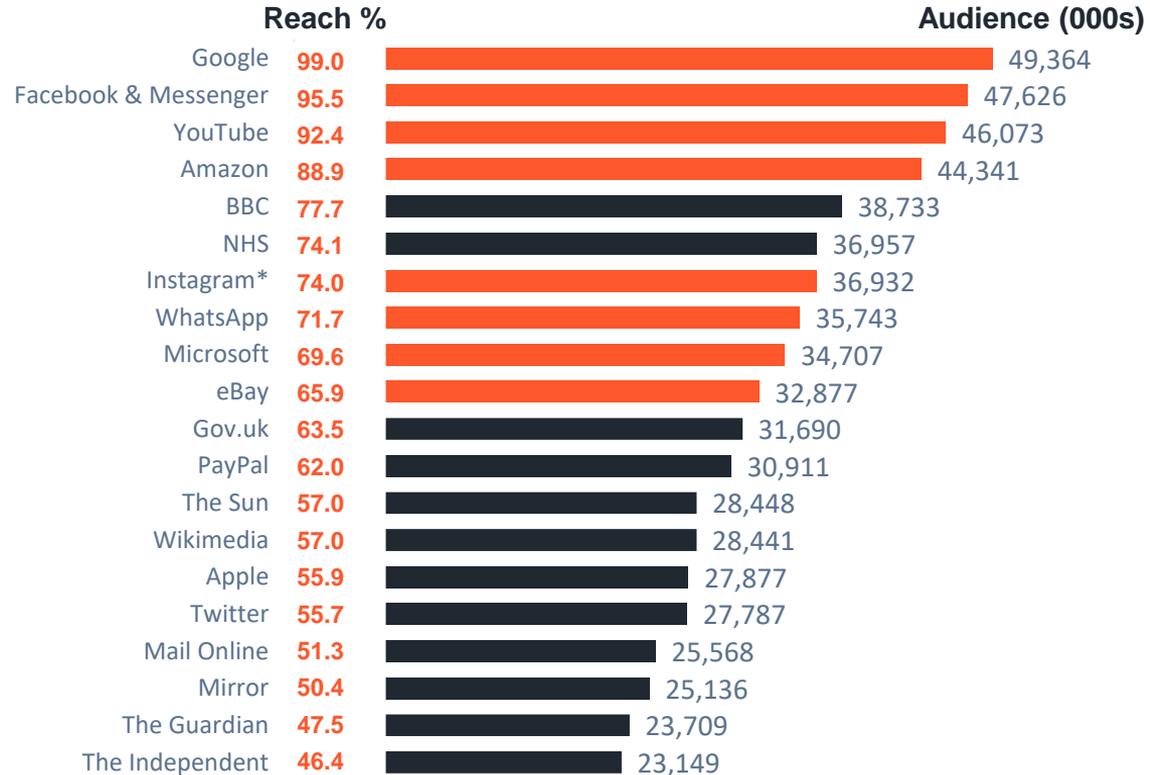
Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022

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



Top 20 online brands by audience

US global brands dominate the top 10



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

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month *Instagram.com is under investigation due to changes in the URL structure.



Top 10 organisations by audience & minutes



Bytedance (TikTok) and Snap enter the top 5 for minutes despite not being in the top 10 for audience

| | Media | Audience (000s) | Audience Reach (%) |
|----|----------------------------------|-----------------|--------------------|
| 1 | Alphabet | 49,483 | 99.2 |
| 2 | Meta (previously Facebook Sites) | 48,999 | 98.2 |
| 3 | Amazon, Inc | 45,128 | 90.5 |
| 4 | Microsoft Corporation | 40,207 | 80.6 |
| 5 | Reach Plc | 39,006 | 78.2 |
| 6 | BBC Corporation | 38,733 | 77.7 |
| 7 | NHS Sites | 36,957 | 74.1 |
| 8 | UK Government | 34,652 | 69.5 |
| 9 | eBay Inc | 33,722 | 67.6 |
| 10 | Mail Metro Media | 33,020 | 66.2 |

| | Media | Total Mins (MM) | Avg. Mins PP |
|----|----------------------------------|-----------------|--------------|
| 1 | Meta (previously Facebook Sites) | 70,438 | 1437:32 |
| 2 | Alphabet | 59,374 | 1199:53 |
| 3 | Bytedance Inc. | 14,075 | 797:28 |
| 4 | Snap Inc | 9,188 | 782:40 |
| 5 | BBC Corporation | 9,093 | 234:46 |
| 6 | Microsoft Corporation | 8,685 | 216:01 |
| 7 | Amazon, Inc | 8,435 | 186:55 |
| 8 | Twitter | 4,833 | 173:56 |
| 9 | Netflix Inc | 3,963 | 225:30 |
| 10 | eBay Inc | 3,571 | 105:54 |



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

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 brands by audience & minutes



Social media brands dominate the top 10 for time

| | Media | Audience (000s) | Audience Reach (%) |
|----|----------------------|-----------------|--------------------|
| 1 | Google | 49,364 | 99.0 |
| 2 | Facebook & Messenger | 47,626 | 95.5 |
| 3 | YouTube | 46,073 | 92.4 |
| 4 | Amazon | 44,341 | 88.9 |
| 5 | BBC | 38,733 | 77.7 |
| 6 | NHS | 36,957 | 74.1 |
| 7 | Instagram* | 36,932 | 74.0 |
| 8 | WhatsApp | 35,743 | 71.7 |
| 9 | Microsoft | 34,707 | 69.6 |
| 10 | eBay | 32,877 | 65.9 |

| | Media | Total Mins (MM) | Avg. Mins PP |
|----|----------------------|-----------------|--------------|
| 1 | Facebook & Messenger | 49,699 | 1043:31 |
| 2 | YouTube | 34,559 | 750:06 |
| 3 | Google | 24,815 | 502:41 |
| 4 | TikTok | 14,074 | 797:28 |
| 5 | Instagram* | 10,998 | 297:48 |
| 6 | WhatsApp | 9,721 | 271:59 |
| 7 | Snapchat | 9,186 | 795:12 |
| 8 | BBC | 9,093 | 234:46 |
| 9 | Amazon | 7,290 | 164:25 |
| 10 | Microsoft | 6,845 | 197:12 |



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

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'.

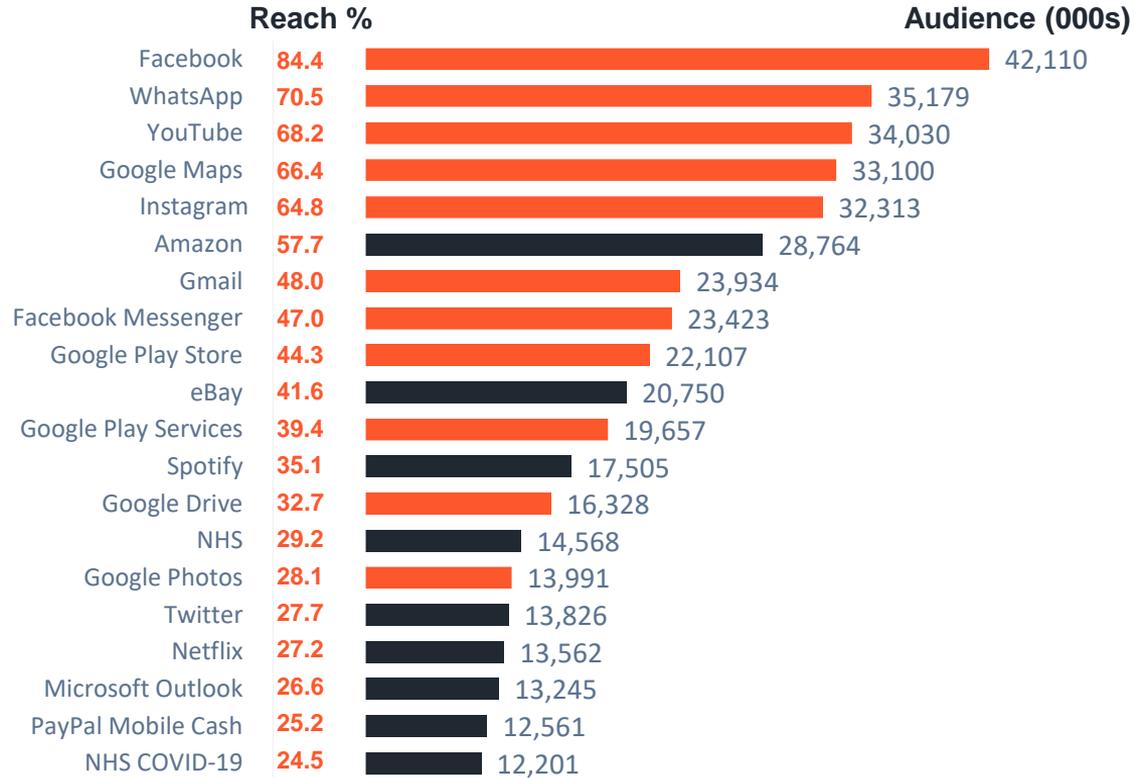
*Instagram.com is under investigation due to changes in the URL structure.

Top mobile apps



Top 20 mobile apps by audience

Google and Meta (Facebook) apps dominate the Top 20 for audience reach



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

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



Top 10 mobile apps by audience & minutes



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

| | Media | Audience (000S) | Audience Reach (%) |
|----|--------------------|-----------------|--------------------|
| 1 | Facebook | 42,110 | 84.4 |
| 2 | WhatsApp | 35,179 | 70.5 |
| 3 | YouTube | 34,030 | 68.2 |
| 4 | Google Maps | 33,100 | 66.4 |
| 5 | Instagram | 32,313 | 64.8 |
| 6 | Amazon | 28,764 | 57.7 |
| 7 | Gmail | 23,934 | 48.0 |
| 8 | Facebook Messenger | 23,423 | 47.0 |
| 9 | Google Play Store | 22,107 | 44.3 |
| 10 | eBay | 20,750 | 41.6 |

| | Media | Total Mins (MM) | Avg. Mins PP |
|----|--------------------|-----------------|--------------|
| 1 | Facebook | 41,877 | 994:27 |
| 2 | YouTube | 25,735 | 756:13 |
| 3 | TikTok | 14,028 | 1218:36 |
| 4 | Instagram | 10,707 | 331:20 |
| 5 | WhatsApp | 9,621 | 273:30 |
| 6 | Snapchat | 9,168 | 810:15 |
| 7 | Gmail | 3,699 | 154:34 |
| 8 | Twitter | 3,662 | 264:53 |
| 9 | Google Maps | 3,615 | 109:12 |
| 10 | Facebook Messenger | 3,484 | 148:45 |



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

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



5 of the top 6 tablet apps for total minutes are video services



Smartphone Top 10

| | MEDIA | TOTAL MINS (MM) | AVG. MINS PP |
|----|--------------------|-----------------|--------------|
| 1 | Facebook | 35,142 | 872:17 |
| 2 | YouTube | 19,278 | 607:27 |
| 3 | TikTok | 13,667 | 1217:52 |
| 4 | Instagram | 10,273 | 338:04 |
| 5 | WhatsApp | 9,372 | 268:33 |
| 6 | Snapchat | 9,150 | 813:35 |
| 7 | Twitter | 3,457 | 260:46 |
| 8 | Google Maps | 3,305 | 103:46 |
| 9 | Facebook Messenger | 3,290 | 147:08 |
| 10 | Gmail | 3,264 | 141:17 |



Tablet Top 10

| | MEDIA | TOTAL MINS (MM) | AVG. MINS PP |
|----|--------------|-----------------|--------------|
| 1 | Facebook | 6,734 | 680:35 |
| 2 | YouTube | 6,457 | 1016:49 |
| 3 | Netflix | 987 | 327:52 |
| 4 | BBC iPlayer | 925 | 357:31 |
| 5 | Disney | 504 | 708:58 |
| 6 | YouTube Kids | 447 | 1234:24 |
| 7 | Gmail | 435 | 142:37 |
| 8 | Kindle | 435 | 308:08 |
| 9 | Instagram | 433 | 93:17 |
| 10 | BBC News | 433 | 188:19 |



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

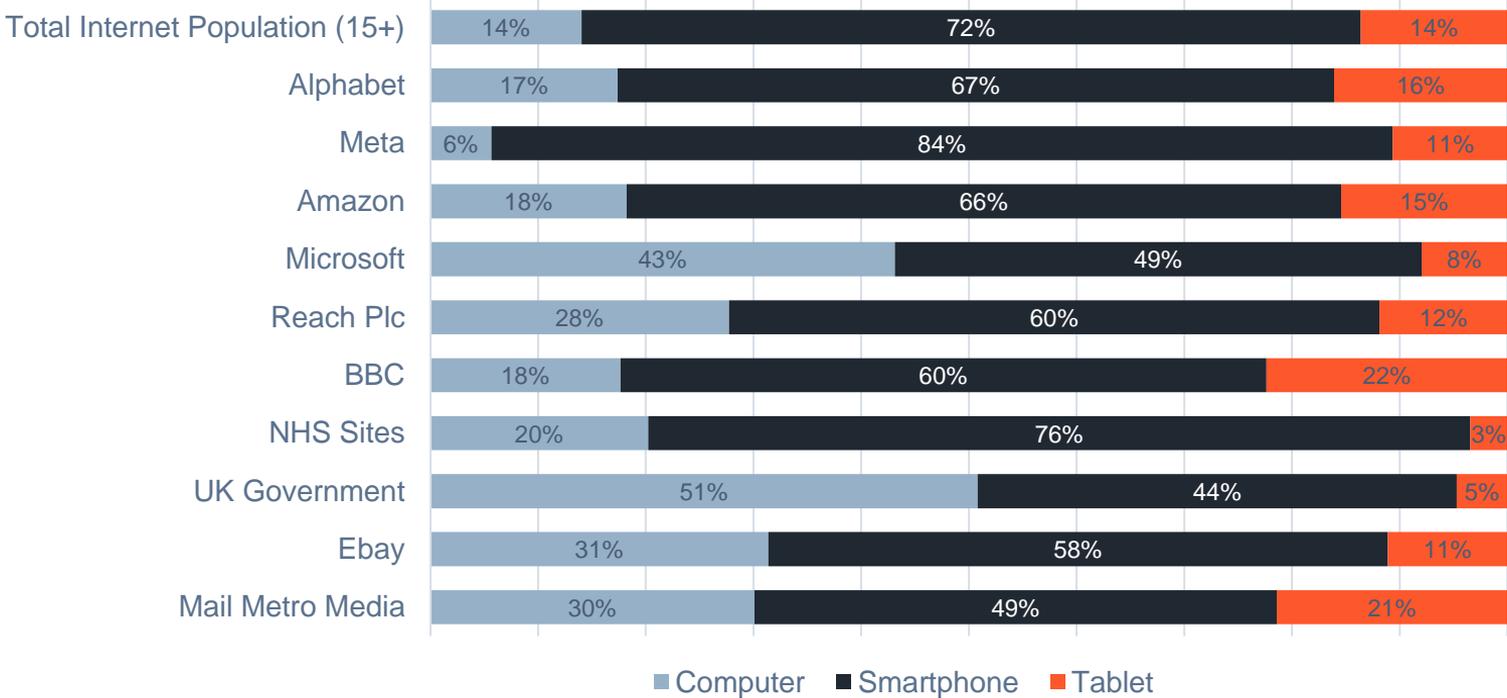
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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

Device share of minutes by top 10 organisations



Device share of minutes varies by organisation



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

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

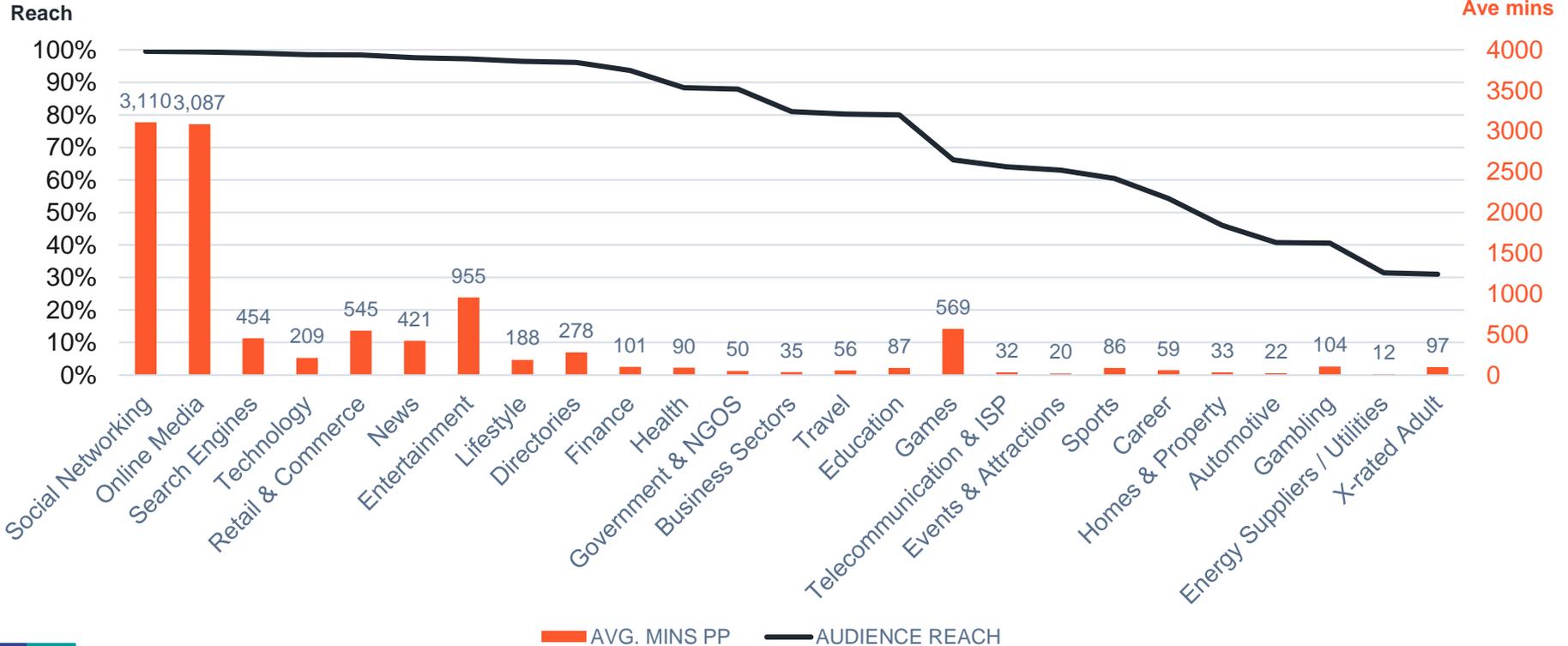
Category Comparisons



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



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



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

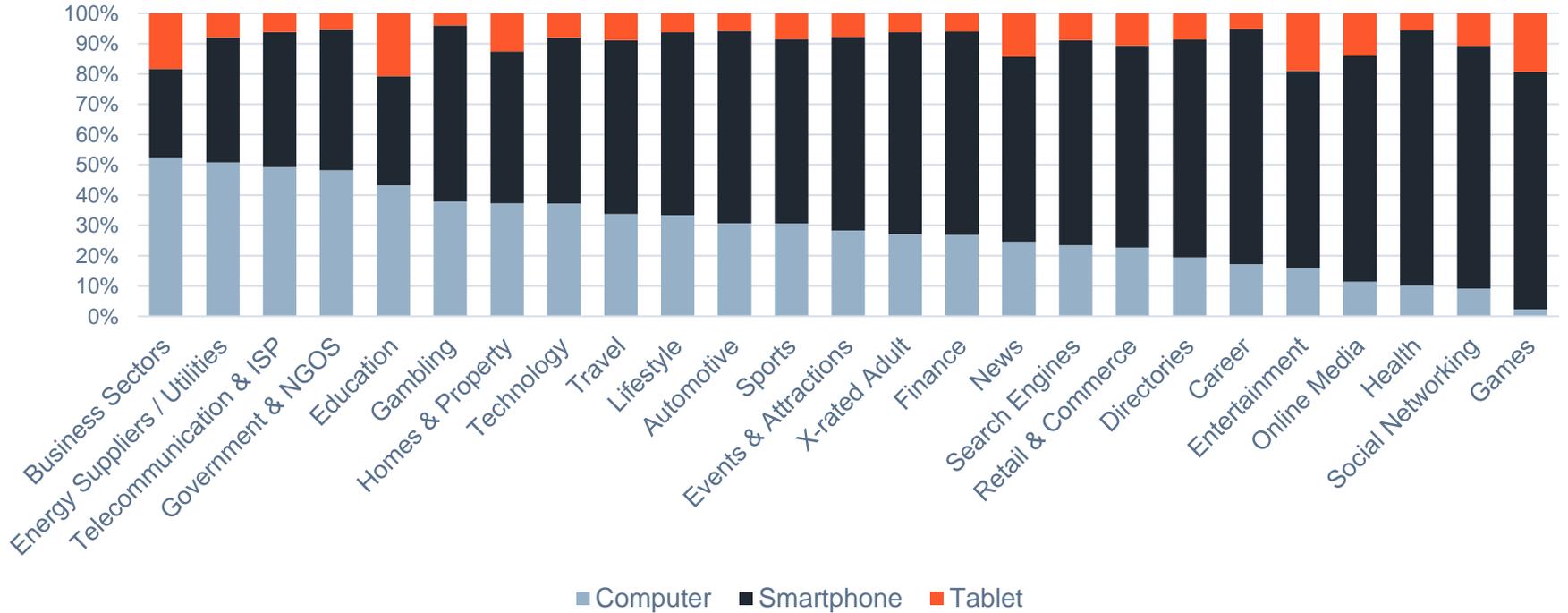
Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month.

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

Share of minutes by device by tier 1 category



Content type significantly influences choice of device. PC still key for utilities, government, telcos & education



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

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'



Topical Insights



People focused on banking on January 4th – the first day back at work for many after Xmas



Top 10 Banking Apps on 4th January 2022

| APP RANK | DATE | MEDIA | AUDIENCE (000s) |  |  |
|----------|------------|----------------------------|-----------------|---|---|
| 26 | 04/01/2022 | Natwest | 2,822 | 15% ↑ | 28% ↑ |
| 27 | 04/01/2022 | Nationwide | 2,696 | 14% ↑ | 28% ↑ |
| 34 | 04/01/2022 | Santander Personal Banking | 1,882 | 3% ↑ | 9% ↑ |
| 40 | 04/01/2022 | Halifax Mobile Banking | 1,652 | 33% ↑ | 47% ↑ |
| 45 | 04/01/2022 | Barclays | 1,452 | 32% ↑ | 24% ↑ |
| 46 | 04/01/2022 | Monzo | 1,446 | 6% ↑ | 35% ↑ |
| 48 | 04/01/2022 | First Direct | 1,281 | 19% ↑ | 43% ↑ |
| 52 | 04/01/2022 | Lloyds Mobile Banking | 1,194 | 34% ↑ | 34% ↑ |
| 64 | 04/01/2022 | HSBC UK Mobile Banking | 1,018 | 19% ↑ | 37% ↑ |
| 66 | 04/01/2022 | TSB Mobile Banking | 1,012 | 29% ↑ | 40% ↑ |

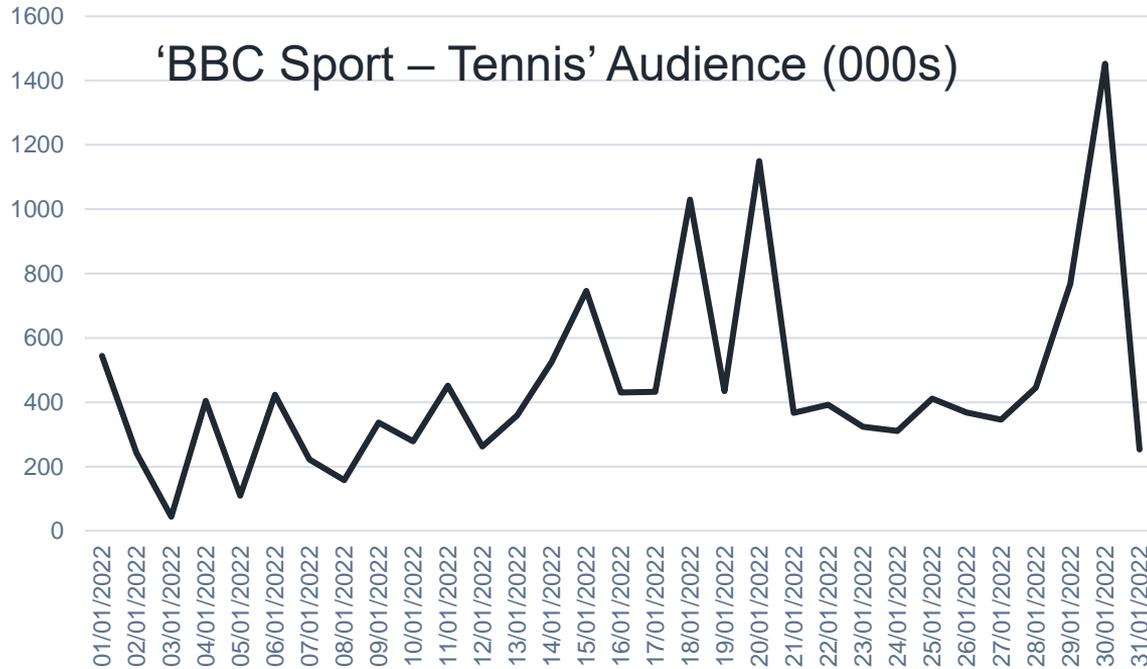
D = compared to the day before. W = compared to the same day the week before

Source: Ipsos, Ipsos iris Online Audience Measurement Service, 4th January 2022

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



Over 1.4 million visited 'BBC Sport – tennis' on 30th January - the day of the Australian Open Men's final



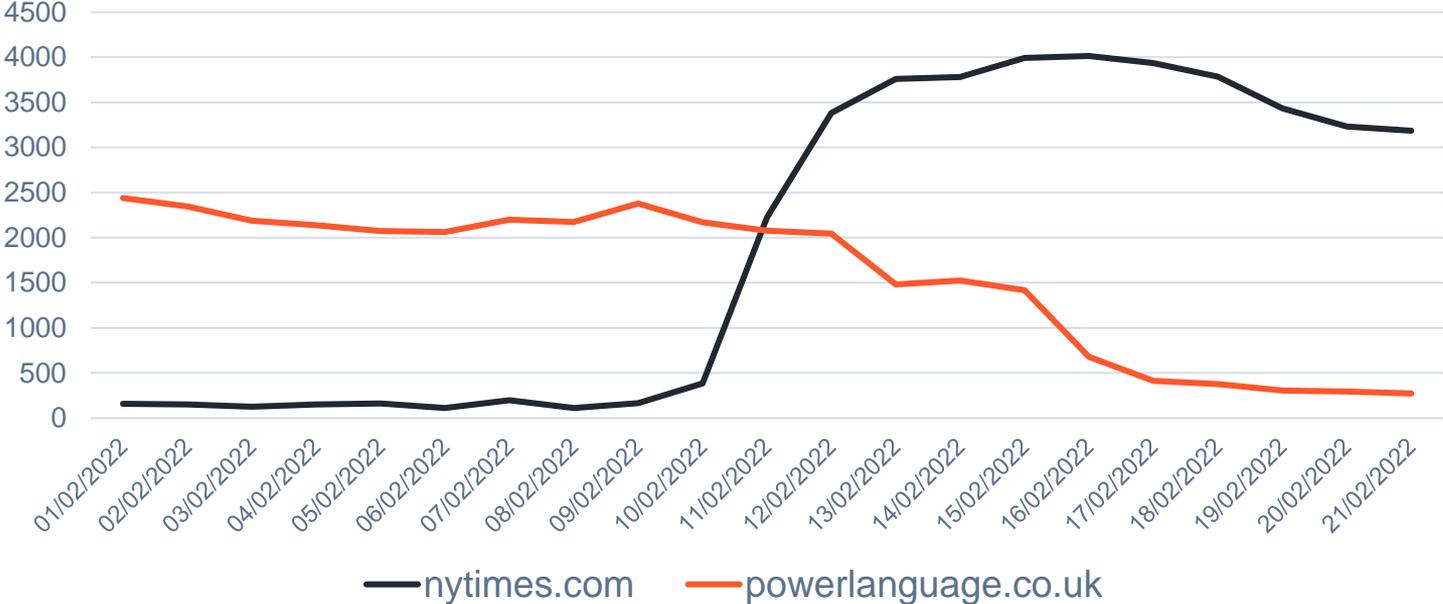
Source: Ipsos, Ipsos iris Online Audience Measurement Service, January 2022

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

UK daily visitors to nytimes.com hit 4 million on 16th Feb due to the impact of **W O R D L E**



UK Audience (000s)



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

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

Those struggling to achieve a work-life balance are more likely to visit online career sites



Target Audience = I find it difficult to balance work, children and social life - definitely agree

| MEDIA | AUDIENCE (000S) | AUDIENCE AFFINITY INDEX | AUDIENCE REACH (%) |
|---------------------------|-----------------|-------------------------|--------------------|
| TARGET | 4,916 | 100 | 100 |
| All Careers Online brands | 2,976 | 111 | 60.53 |
| LinkedIn | 2,298 | 115 | 46.75 |
| Indeed | 990 | 119 | 20.14 |
| Totaljobs Group | 437 | 132 | 8.89 |
| Reed | 374 | 149 | 7.6 |
| Glassdoor | 335 | 113 | 6.82 |
| Talent | 256 | 117 | 5.2 |
| CV-Library | 175 | 105 | 3.57 |
| Prospects | 126 | 116 | 2.57 |
| Adzuna | 123 | 128 | 2.5 |
| Jobs-Bear | 103 | 124 | 2.09 |

61% visited a career service online in January 2022 compared to only **54%** of the UK online population.



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

Base - All aged 15+ years using PC/laptop, smartphone or tablet device(s) in that month. Total Selection = All airline brands excluding airports



Questions?

Find out more at:

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

Email us at:

insights@ukom.uk.net

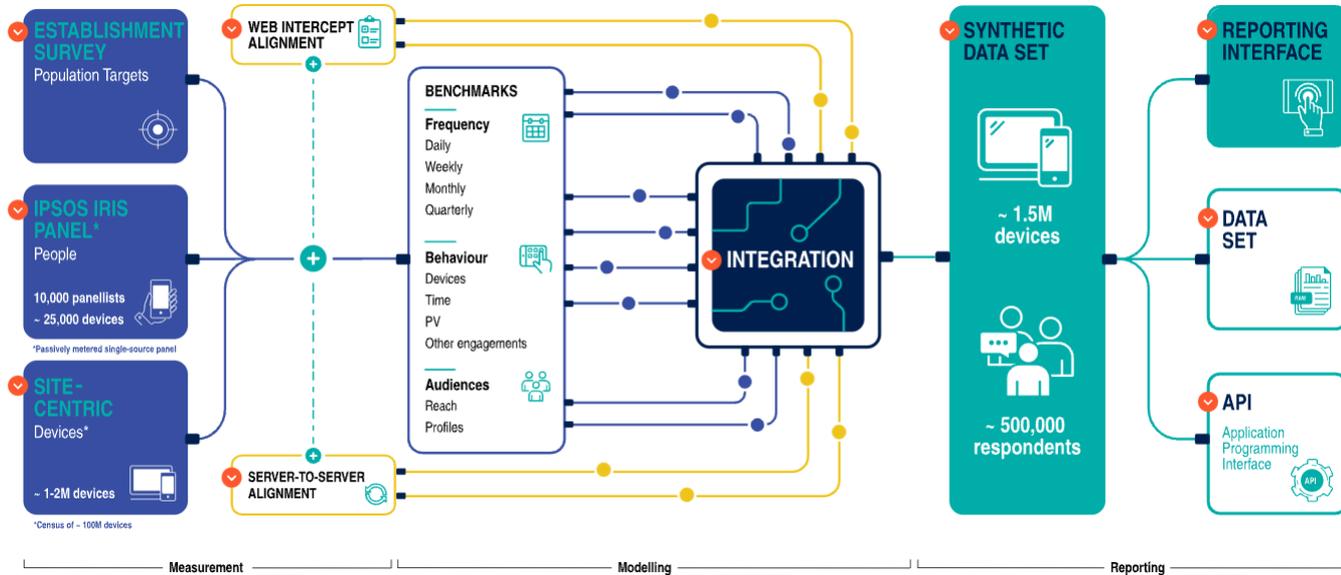
Methodology



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/>