Ipsos iris
Social Media

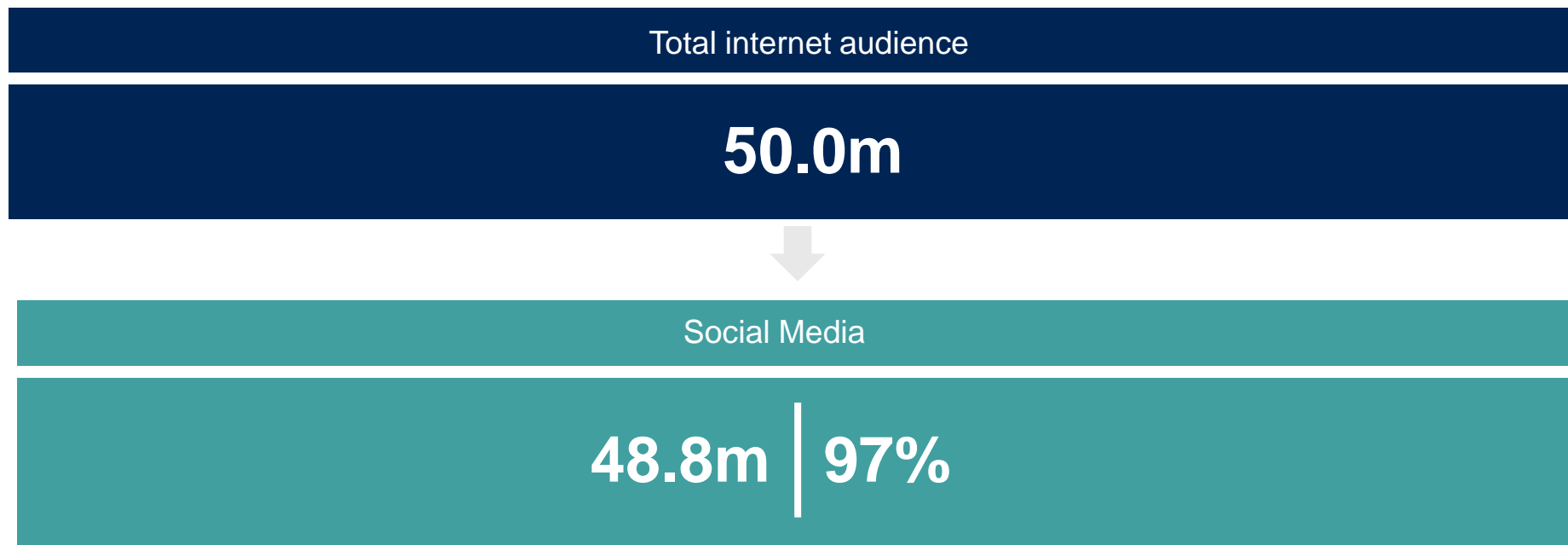## November 2023

Almost everyone is on social media these days

97% of the online population accessed social media in September

Total internet audience
50.0m

Social Media
48.8m │ **97%**

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Key Objectives

1 OPPORTUNITY SIZING

Understand the reach and engagement that social media offers advertisers

2 AUDIENCE PROFILE

Understand the biggest players in the social media space, how this is changing and how you can find the best platform to reach your audience

3 ADVERTISING & PARTNERSHIPS

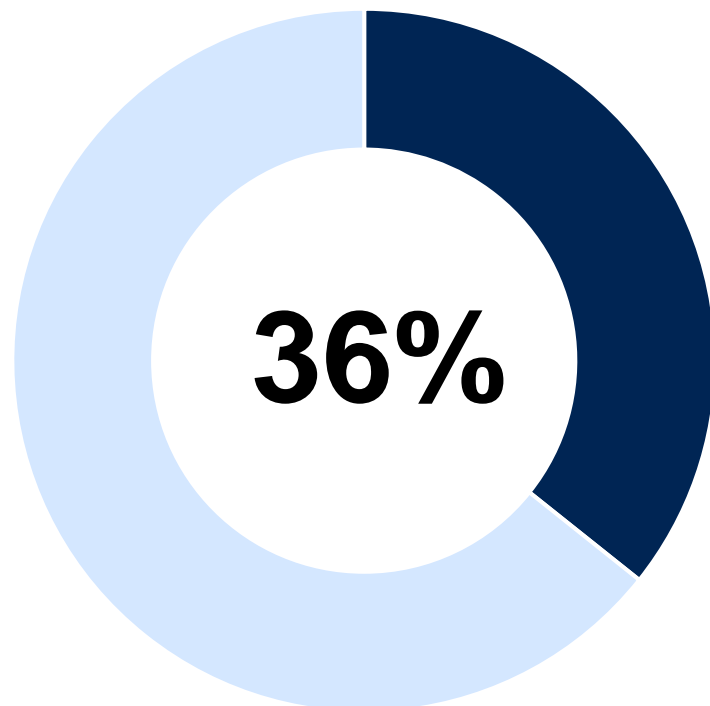Understand the best media and brand partnerships to deliver reach and drive growth

OPPORTUNITY SIZING

01

We spend over a third of our online lives on social media

Social media is HUGE: it's essential for advertisers to fully understand this landscape to ensure they are using the right brands and the right platforms to maximise reach return on investment
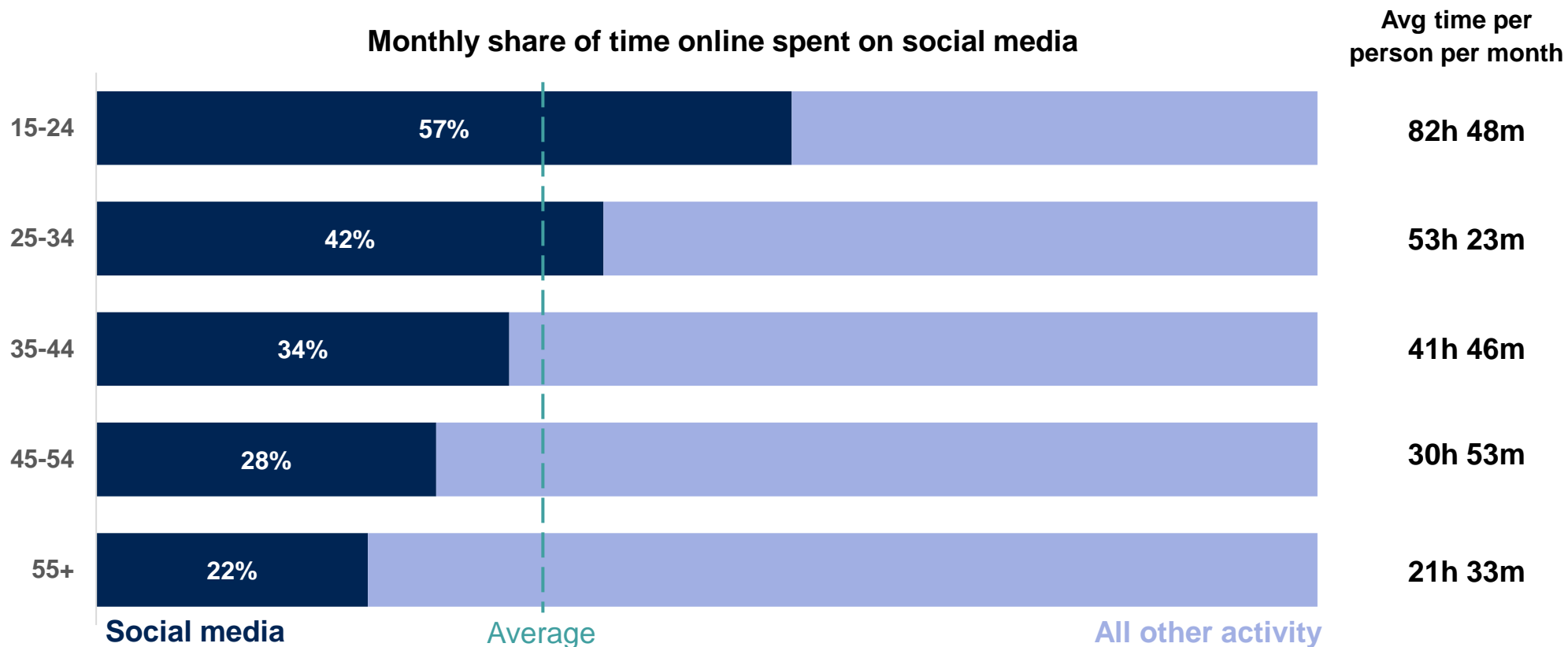
36%

Share of time spent on social media

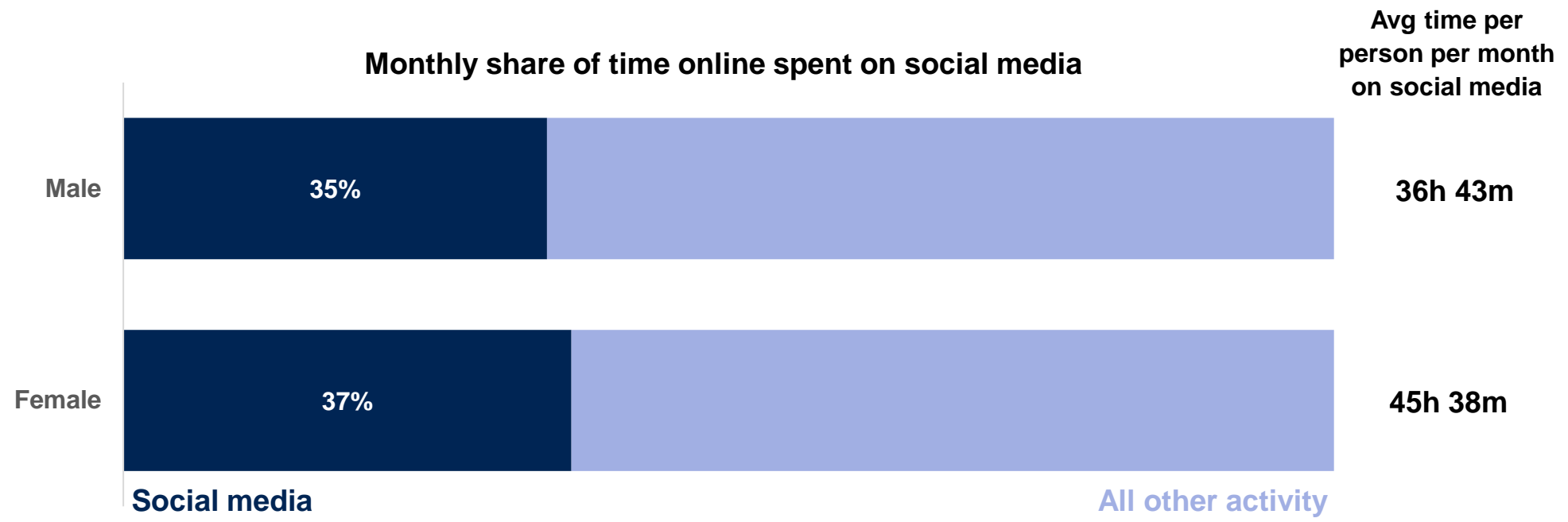That's **1 hour and 45** minutes a day

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Younger audiences spend an even bigger proportion of their time on social media

15-24s spend nearly 60% of their total time online using social media, spending over two hours a day on average browsing. This is an incredibly engaged audience for advertisers.

Monthly share of time online spent on social media

Age	Social media	Avg time per person per month
15-24	57%	82h 48m
25-34	42%	53h 23m
35-44	34%	41h 46m
45-54	28%	30h 53m
55+	22%	21h 33m

Social media   Average   **All other activity**
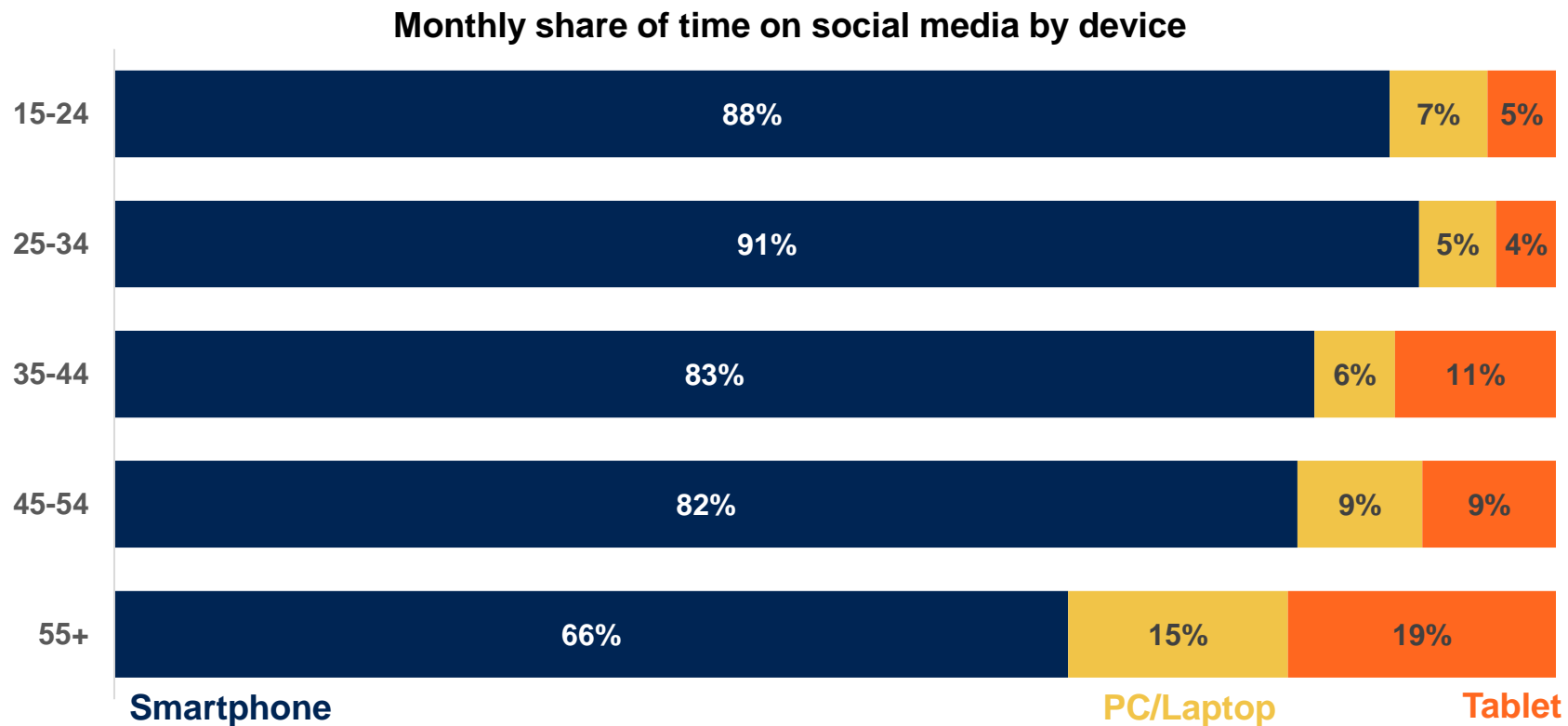
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Women also spend more time on social media

Proportionally, women spend slightly more to their time on social media compared to men. However, because they spend longer online overall, they spend a considerably larger volume of time on social media.

Monthly share of time online spent on social media

Avg time per person per month on social media

	Social media		Avg time
Male	35%		36h 43m
Female	37%		45h 38m

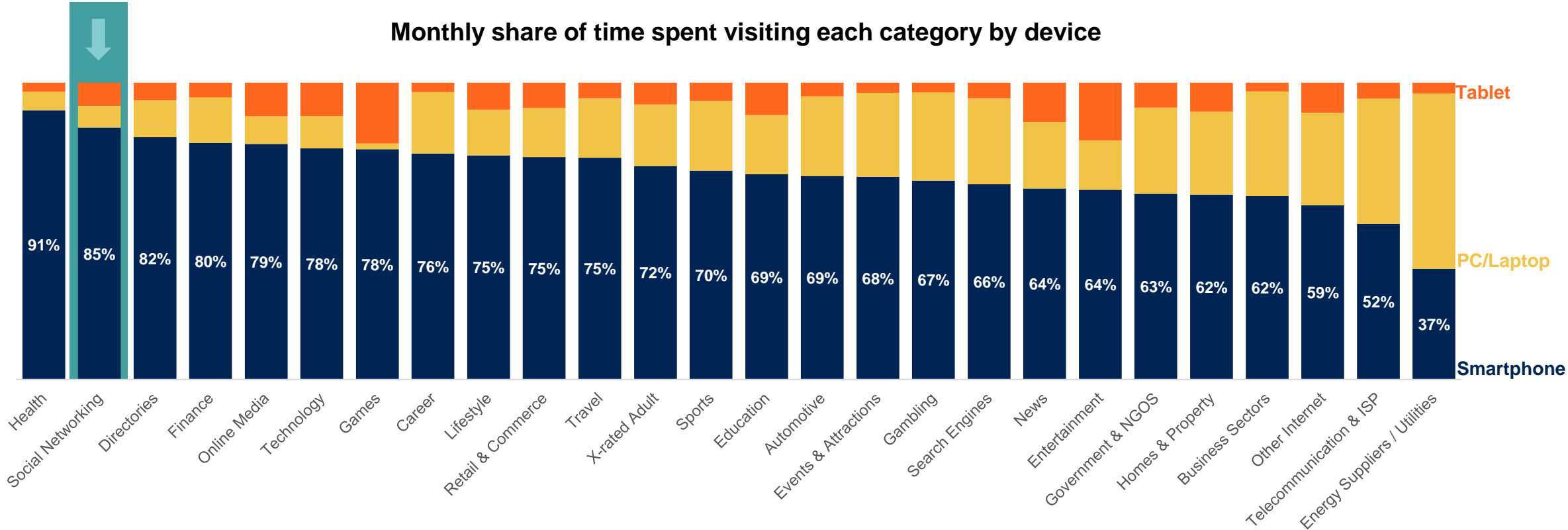**Social media**   **All other activity**

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The majority of time on social media is spent on smartphones

When planning campaigns for social media, it's important to consider that the majority of the audience will see content and ads on a phone – how does this affect where you direct your audience with your advertising?

Monthly share of time on social media by device

Age	Smartphone	PC/Laptop	Tablet
15-24	88%	7%	5%
25-34	91%	5%	4%
35-44	83%	6%	11%
45-54	82%	9%	9%
55+	66%	15%	19%

Smartphone   **PC/Laptop**   **Tablet**

In fact, the social networking category is second in terms of the proportion of overall time spent on smartphones

If you're planning a campaign across multiple categories like social media and news for example, you will need to consider the platform mix across them

Monthly share of time spent visiting each category by device

Category	Smartphone %
Health	91%
Social Networking	85%
Directories	82%
Finance	80%
Online Media	79%
Technology	78%
Games	78%
Career	76%
Lifestyle	75%
Retail & Commerce	75%
Travel	75%
X-rated Adult	72%
Sports	70%
Education	69%
Automotive	69%
Events & Attractions	68%
Gambling	67%
Search Engines	66%
News	64%
Entertainment	64%
Government & NGOS	63%
Homes & Property	62%
Business Sectors	62%
Other Internet	59%
Telecommunication & ISP	52%
Energy Suppliers / Utilities	37%

Tablet
PC/Laptop
Smartphone

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AUDIENCE PROFILE

02

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YouTube and Facebook are the two biggest brands by reach...

YouTube and Facebook each reach over 90% of internet users by themselves. Meanwhile, TikTok is now about the same size as X.

1	2	3	4	5
45.5m	45.1m	36.7m	23.6m	23.5m

6	7	8	9	10
18.4m	13.1m	11.7m	8.1m	4.4m
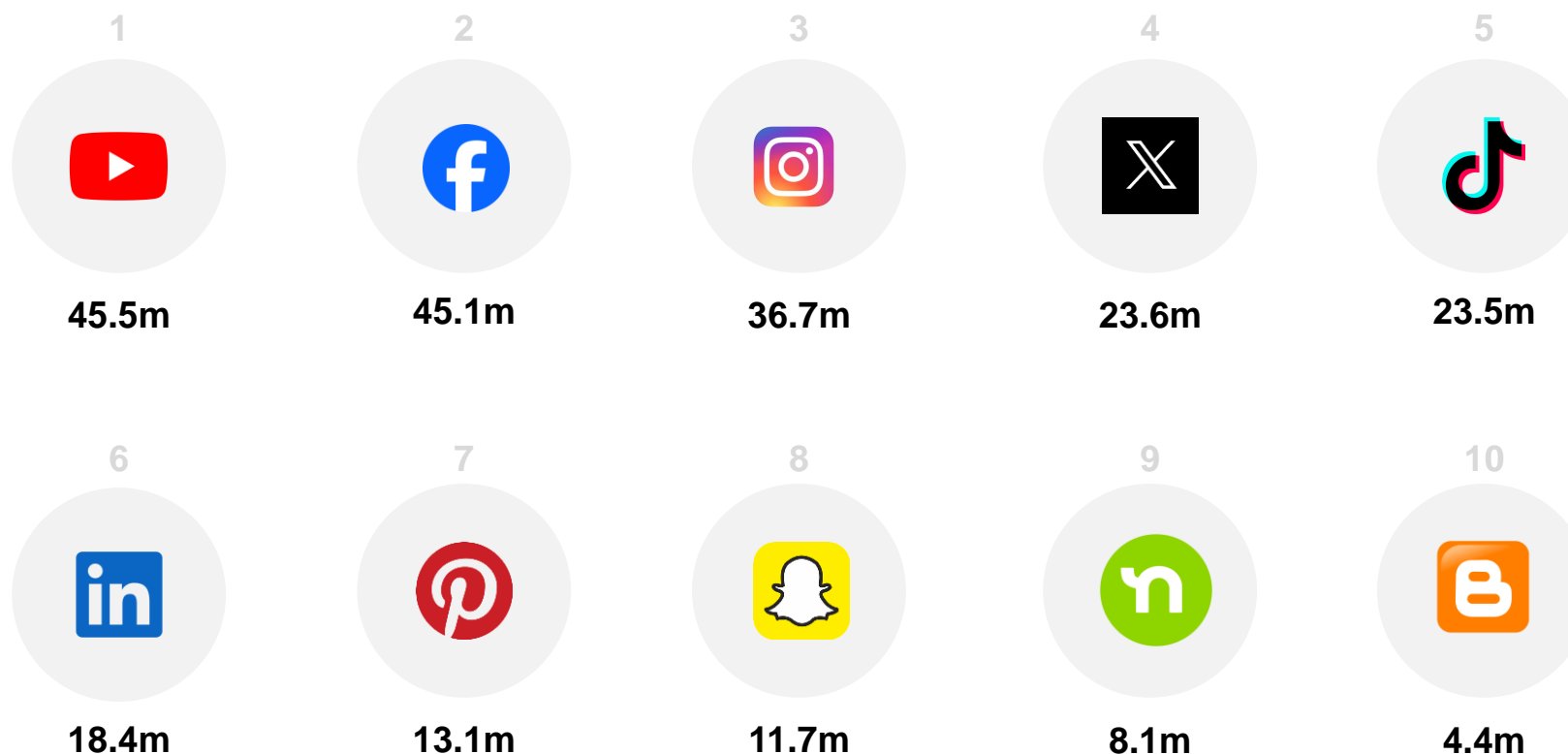
Top 10 Social Media Brands – Monthly audience

…Which means YouTube and Facebook reach a mass audience. Most other social media platforms skew younger and female.

Snapchat has a much younger demographic than the rest of the top 10, while Pinterest has a significantly higher proportion of female visitors. Only X and LinkedIn have a majority male audience. How can this help you when planning social media campaigns?
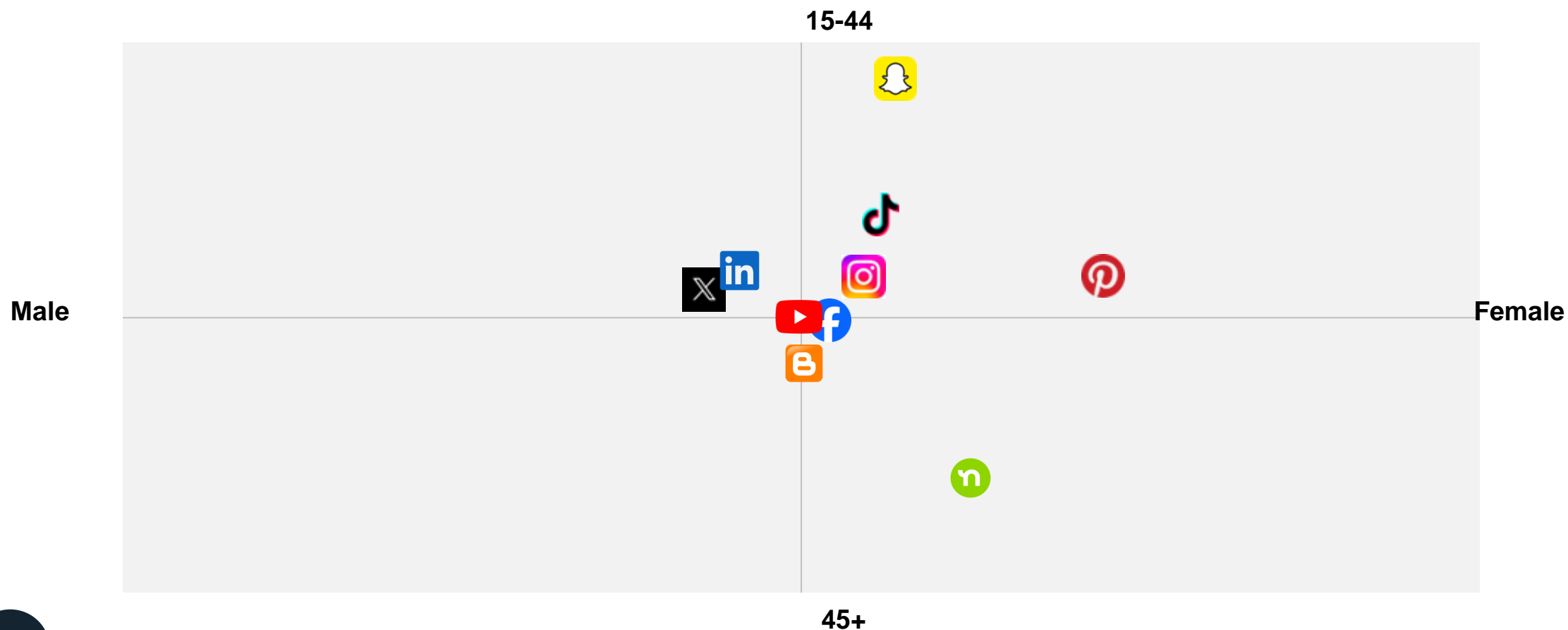
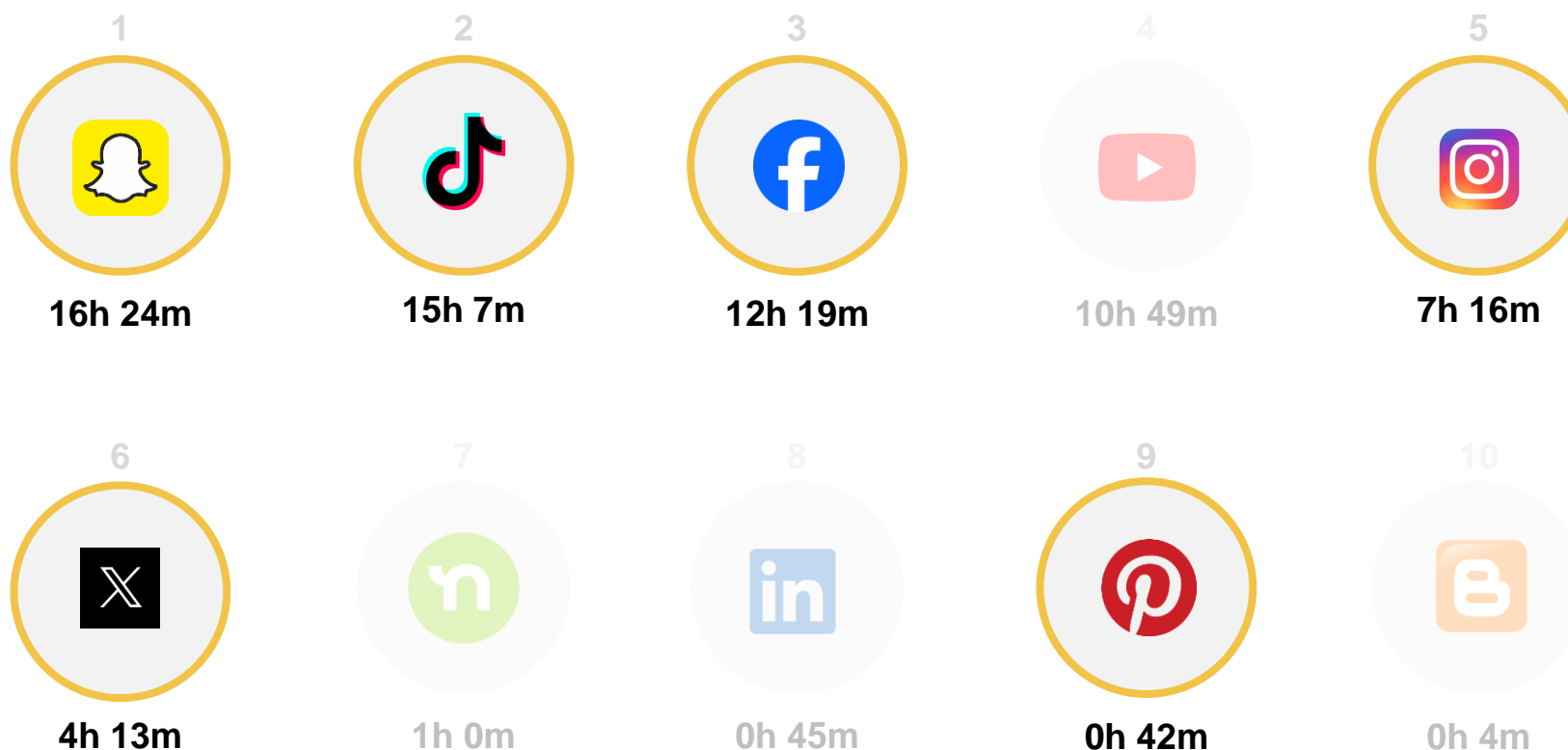# Snapchat and TikTok visitors spend the most time on their platforms

Snapchat and TikTok account for huge amounts of time, which provides a real opportunity for advertisers.

1	2	3	4	5
16h 24m	15h 7m	12h 19m	10h 49m	7h 16m

6	7	8	9	10
4h 13m	1h 0m	0h 45m	0h 42m	0h 4m

Monthly time spent on the top 10 biggest social media brands

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We'll be focusing on these six brands

1 — 16h 24m
2 — 15h 7m
3 — 12h 19m
4 — 10h 49m
5 — 7h 16m
6 — 4h 13m
7 — 1h 0m
8 — 0h 45m
9 — 0h 42m
10 — 0h 4m

Monthly time spent on the top 10 biggest social media brands

Facebook dominates for over 35s, but Snapchat and TikTok have huge engagement with younger demos

Finding the right social platform to partner with will ensure you fully capitalise on the engagement that this channel offers.
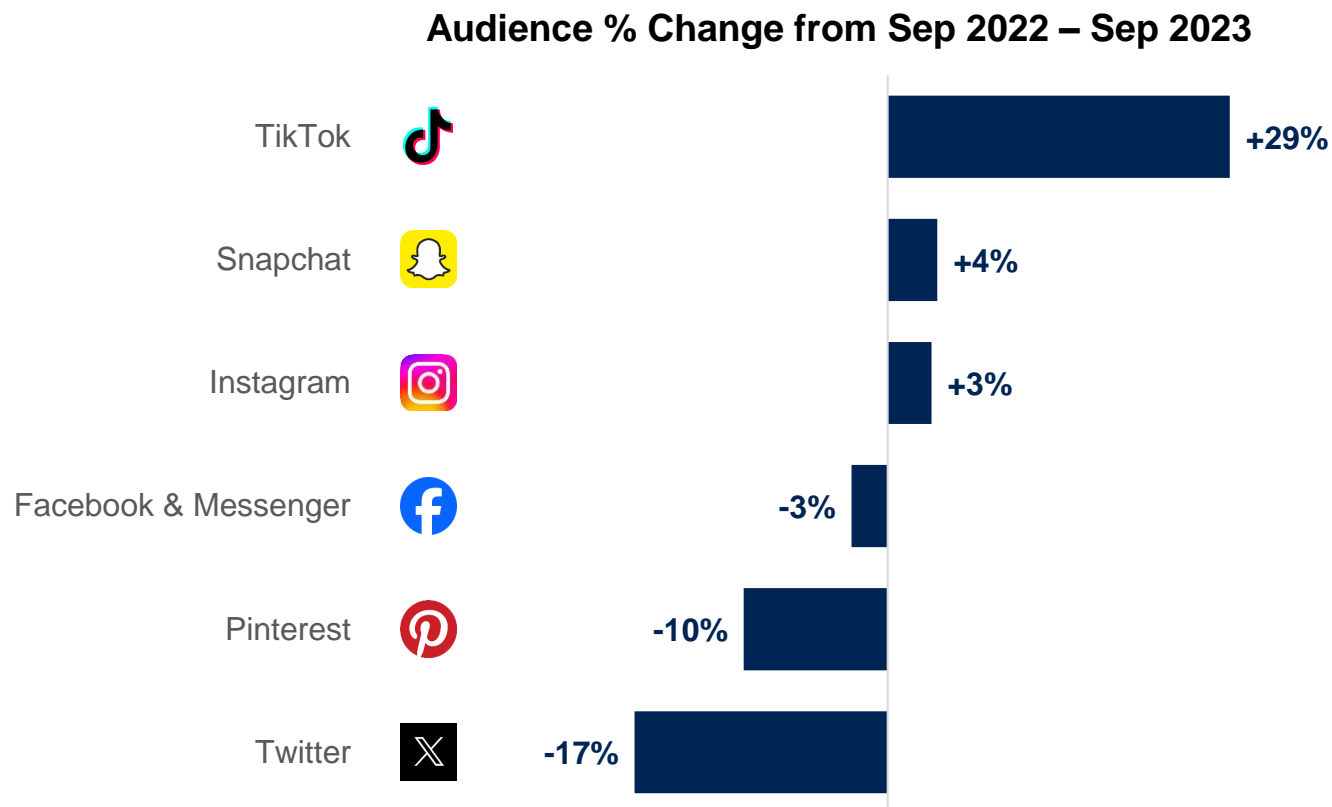
Top brands by avg. mins pp

	15-34		35-54		55+
1	25h 8m	1	15h 14m	1	12h 44m
2	21h 10m	2	8h 29m	2	3h 33m
3	12h 4m	3	5h 51m	3	2h 59m
4	8h 42m	4	5h 47m	4	2h 57m
5	4h 25m	5	4h 33m	5	2h 40m
6	0h 51m	6	0h 34m	6	0h 40m

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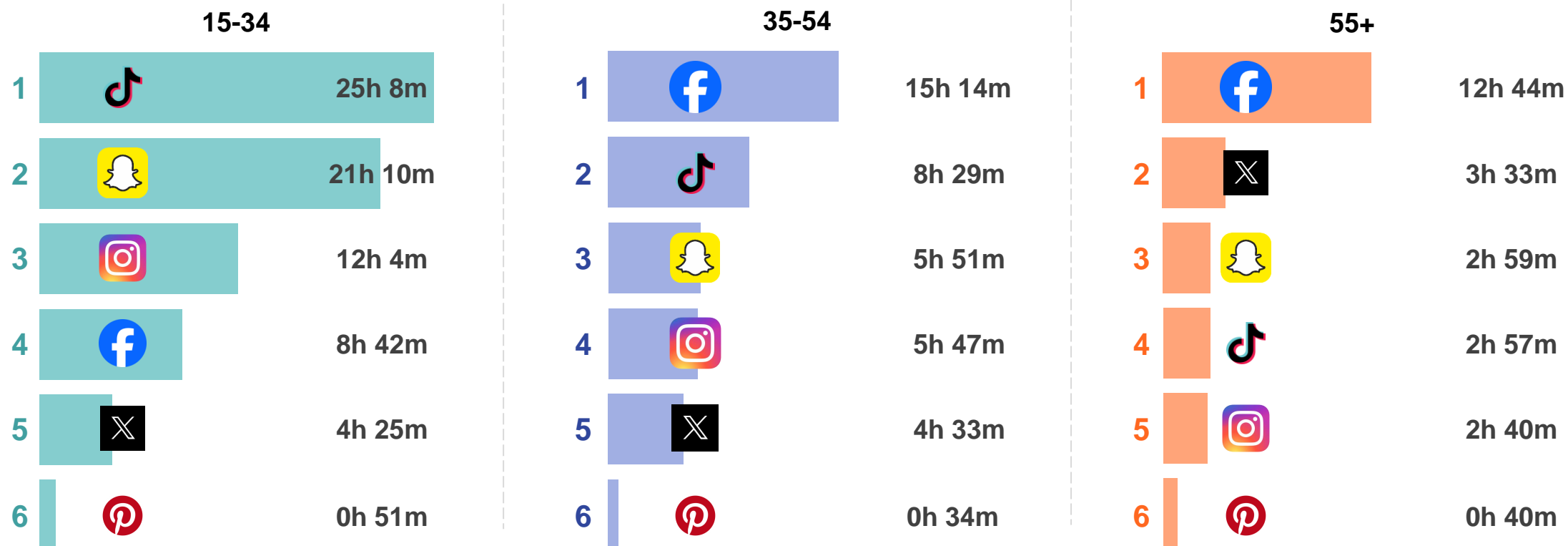
The vast majority of time spent is on app

Advertising, partnerships and content should be optimised for apps across all the top social media platforms.

Share of time spent on app

| 100% | 100% | 98% | 90% | 90% | 87% |
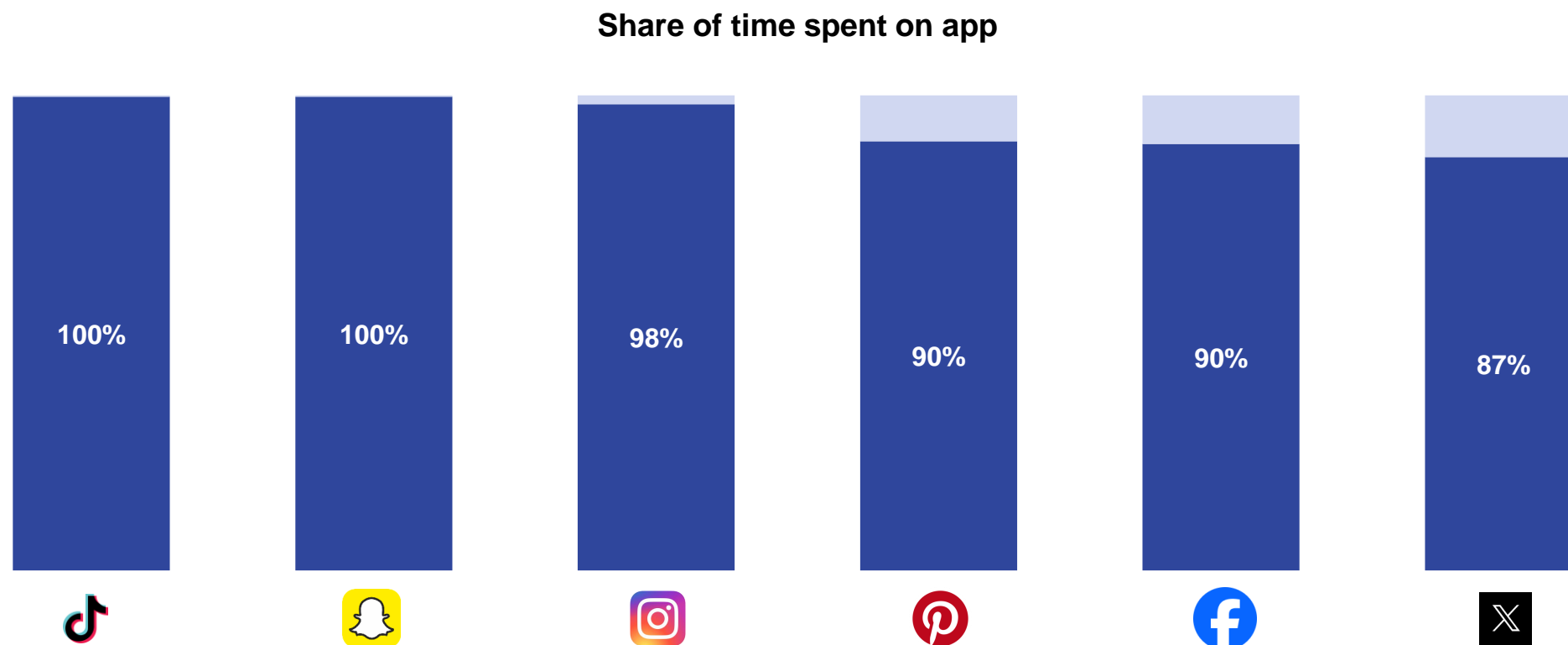
TikTok has seen the greatest year on year increase in audience, while X experienced the largest audience decline

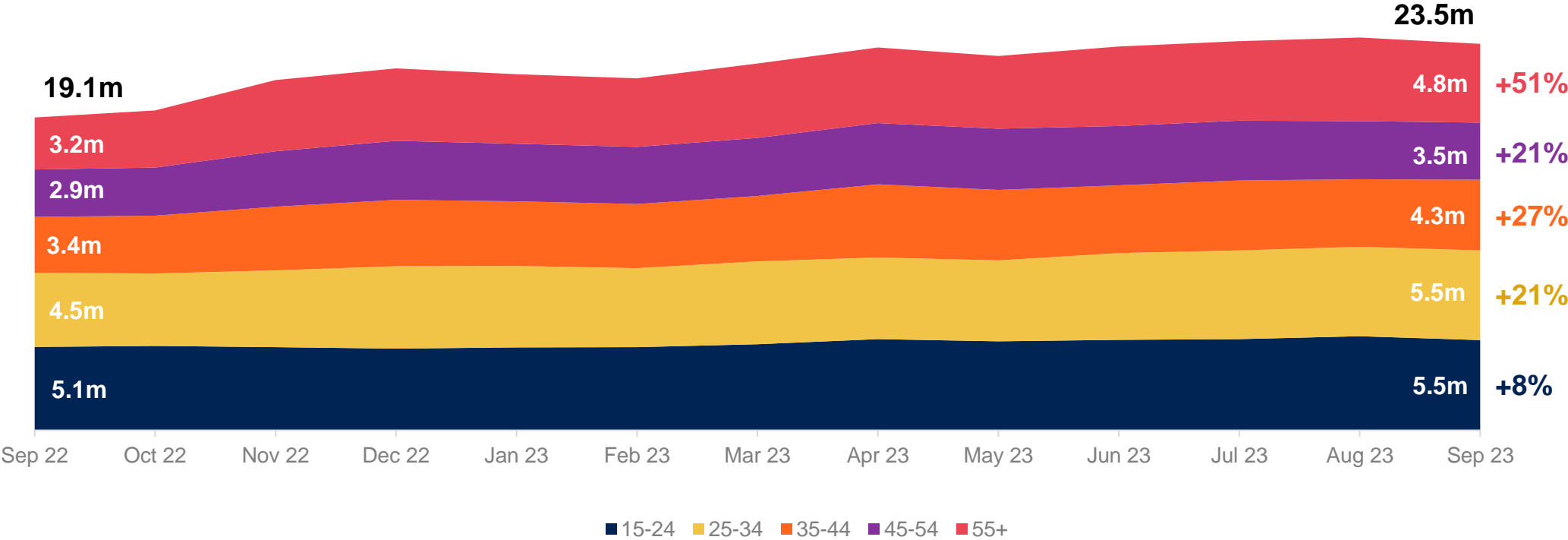**The online world is constantly changing: make sure you're meeting your audience where they are**

Audience % Change from Sep 2022 – Sep 2023

TikTok	+29%
Snapchat	+4%
Instagram	+3%
Facebook & Messenger	-3%
Pinterest	-10%
Twitter	-17%

TikTok's growth has been driven by increased penetration among older audiences

As TikTok's audience matures, it will unlock new opportunities to reach different audiences. Do you have the data to realise the potential of these new audiences?

TikTok Annual Audience by Age

23.5m

19.1m

3.2m	4.8m **+51%**
2.9m	3.5m **+21%**
3.4m	4.3m **+27%**
4.5m	5.5m **+21%**
5.1m	5.5m **+8%**

Sep 22 · Oct 22 · Nov 22 · Dec 22 · Jan 23 · Feb 23 · Mar 23 · Apr 23 · May 23 · Jun 23 · Jul 23 · Aug 23 · Sep 23

■ 15-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

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As TikTok grows, Instagram's exclusive audience is shrinking

Instagram Reels is a direct competitor to TikTok. As the number of people using both platforms increases, the competition for attention will intensify. Do you know which platform is best for your brand?

TikTok and Instagram shared audience

TikTok / **Instagram**

1.9m | 17.2m | 16.5m

September 2022

TikTok / **Instagram**

2.3m
+0.4m | 21.0m
+3.8m | 15.6m
-0.9m

September 2023
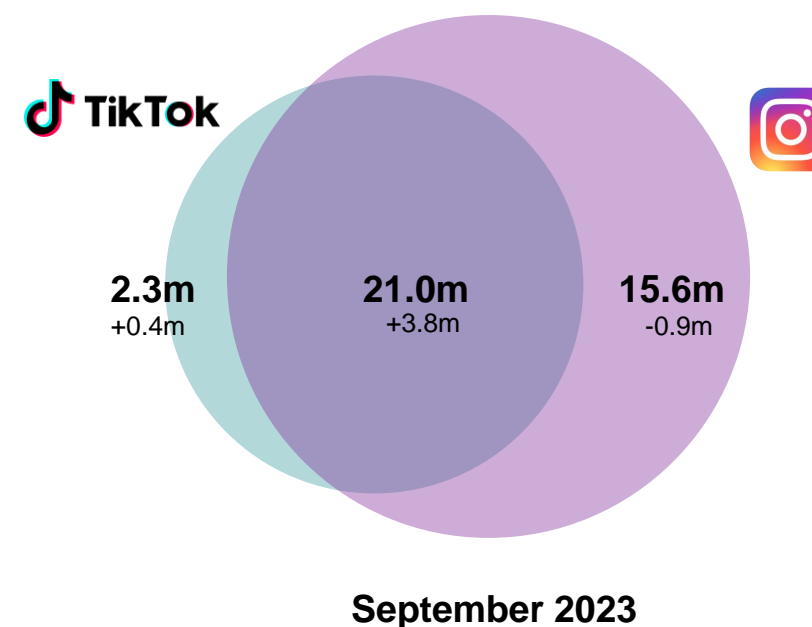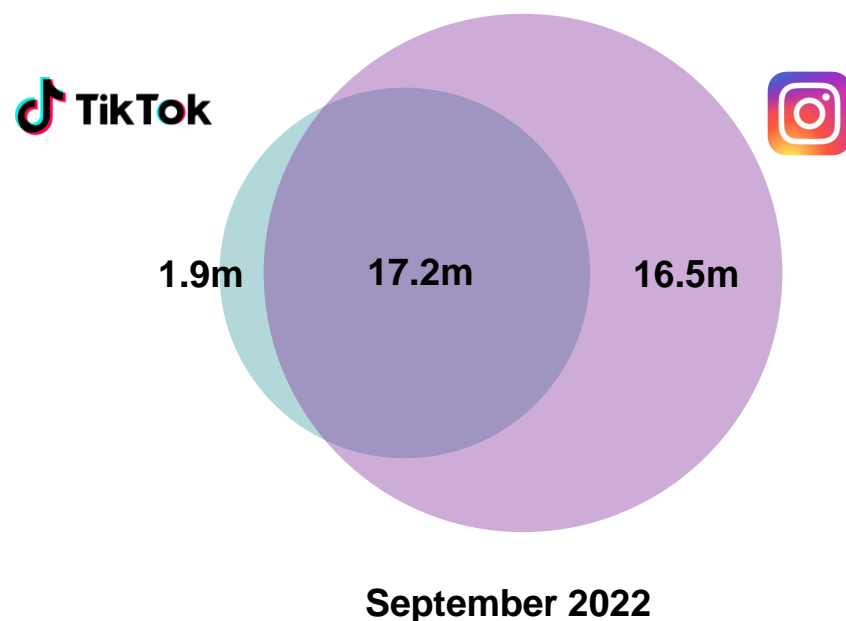
X's audience has declined fastest among users aged 35-44

Twitter still reaches over 23 million users a month, but brands will need to monitor how reach is changing over time and across different demographics to ensure they are still optimising their ad spend.

X (formerly Twitter) Annual Audience by Age

Sale completes

Twitter Blue relaunches

28.6m

8.5m
5.2m
5.1m
5.6m
5.1m

23.6m

7.0m — -17%
4.1m — -17%
4.1m — -19%
4.4m — -18%
4.2m — -16%

Sep-22 Oct-22 Nov-22 Dec-22 Jan-23 Feb-23 Mar-23 Apr-23 May-23 Jun-23 Jul-23 Aug-23 Sep-23

■ 15-24   ■ 25-34   ■ 35-44   ■ 45-54   ■ 55+

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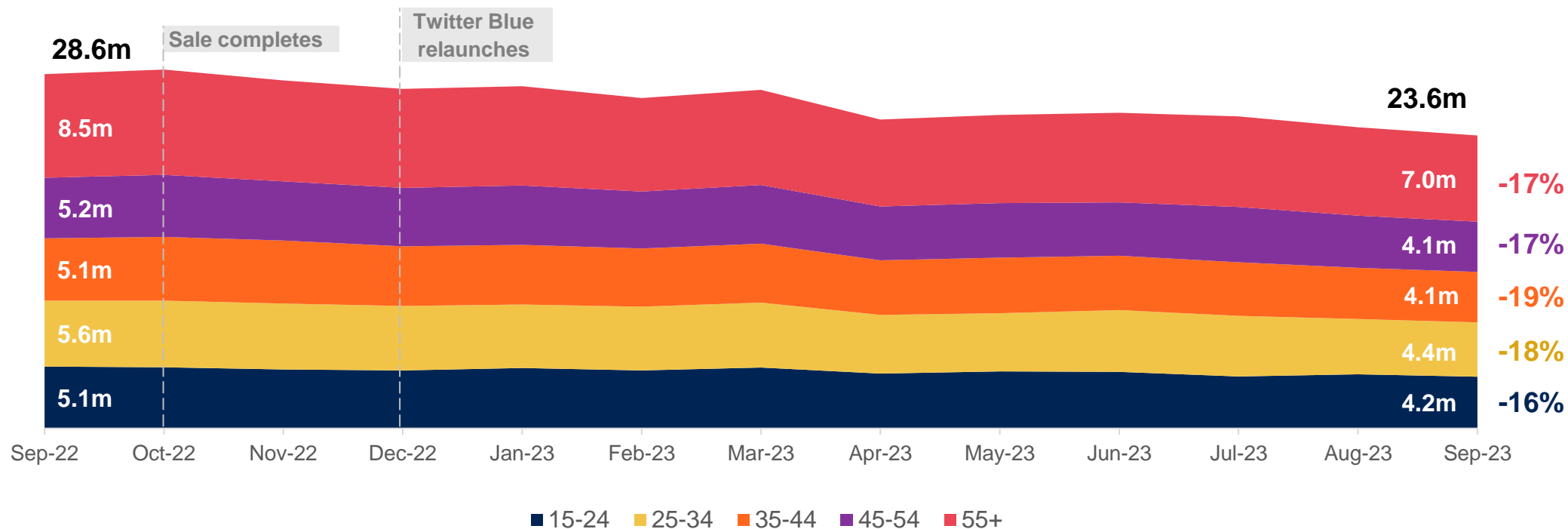
Threads has not been able to capitalise on X's declining audience

Thread's audience at the end of September was less than a quarter of its peak post-launch. The proportion of exclusive Threads visitors dropped too.

Average Daily audience for Threads since launch (Android app only)

Total audience

770k

Exclusive audience

38%

Shared audience with X

62%

182k

33%

67%

06/07/2023 10/07/2023 17/07/2023 24/07/2023 31/07/2023 07/08/2023 14/08/2023 21/08/2023 28/08/2023 04/09/2023 11/09/2023 18/09/2023 25/09/2023

Week commencing

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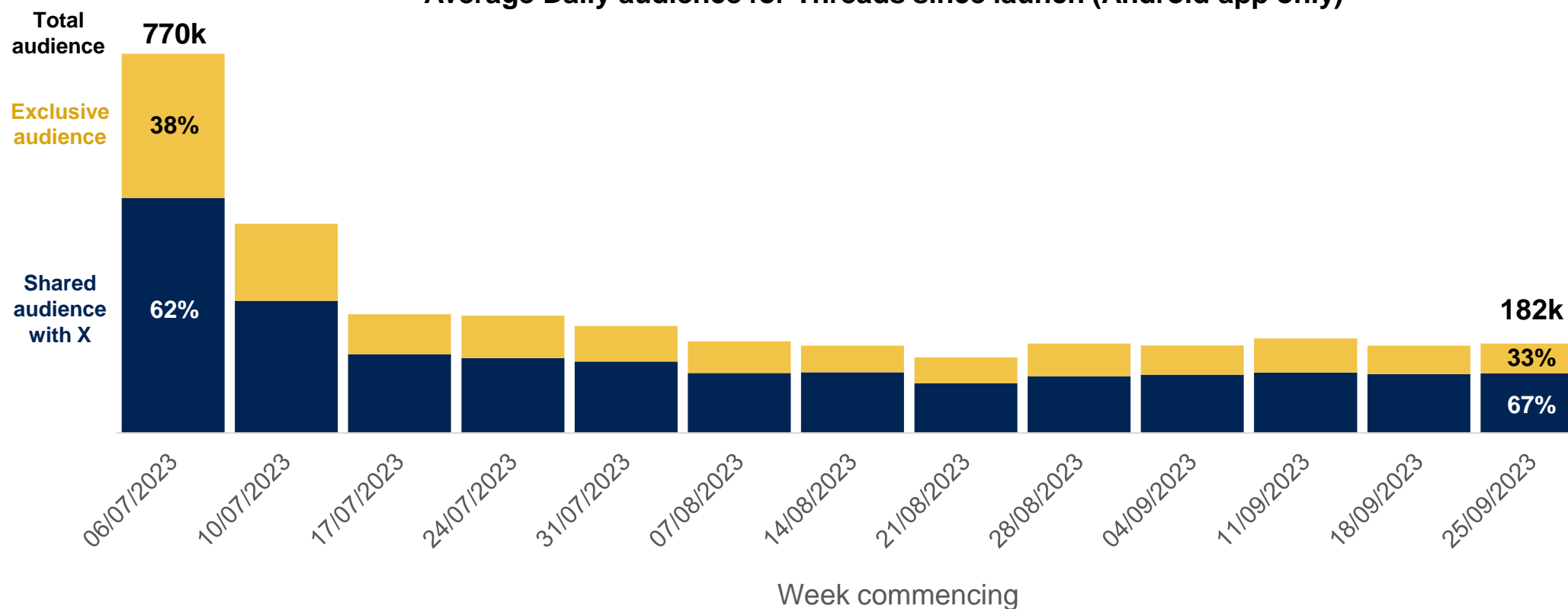
Threads users skew younger and slightly lower income than X users

Younger audiences appear more likely to be using Threads. This can help inform Meta's strategy as it looks to build the brand.

Age band of users (Android app only)

Threads
- 21%
- 15%
- 23%
- 21%
- 19%

X
- 25% — 55+
- 19% — 45-54
- 21% — 35-44
- 19% — 25-34
- 16% — 15-24
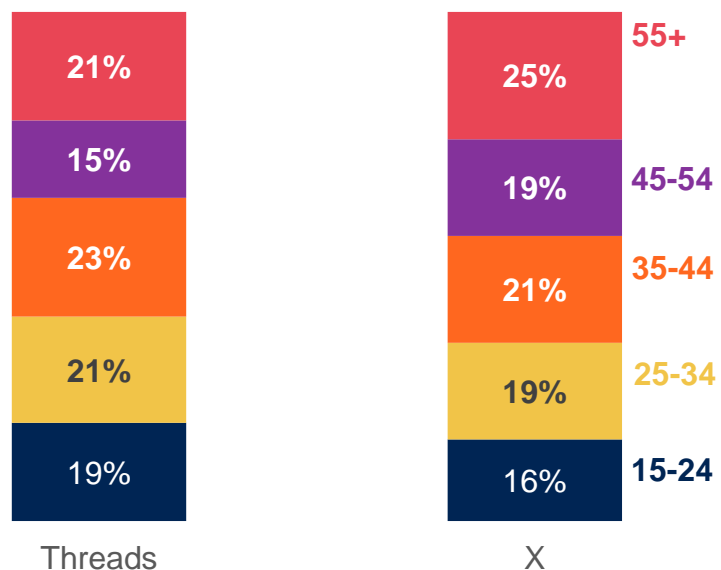
Income of users (Android app only)

Threads
- 16%
- 51%
- 33%

X
- 16% — £50,000+
- 55% — £20,000 – £49,999
- 29% — < £20,000

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ADVERTISING & PARTNERSHIPS

03

Different social media platforms can be used to reach different kinds of audience…

Snapchat's younger audience is more interested in keeping up with fashion and celebrities. Do you understand the attitudes of your customers? And which social media platform most closely mirrors them?

	Celebrities influence my purchase decisions	Try to keep up with developments in technology	Likes to keep up with the latest fashions
Facebook & Messenger	-6%	-1%	-1%
X (Twitter)	-13%	+6%	0%
Instagram	+2%	-1%	+6%
Pinterest	+4%	-7%	+11%
Snapchat	+71%	+2%	+56%
TikTok	+21%	0%	+24%
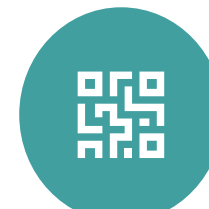
© Ipsos | Ipsos iris | Social Media | November 2023 | Version 1 | Client Use Only

…and different online readers

Which platform will be best for amplifying your content and journalists? Which combinations of social media and news brands will deliver synergy and more opportunities to see campaigns across multiple sites?

Likelihood of news brand readers to visit vs average internet user

	Facebook		X		TikTok	
1	METRO	+7%	Evening Standard.	+28%	METRO	+17%
2	THE SUN	+6%	The Guardian	+24%	Evening Standard.	+16%
3	DAILY Mirror	+6%	THE TIMES	+24%	DAILY Mirror	+15%
4	THE TIMES	+6%	The Telegraph	+23%	INDEPENDENT	+14%
5	Mail Online	+6%	METRO	+23%	THE SUN	+13%

Social media users have high affinity for digital-only retail brands like ASOS, Vinted and Shein

Think reach AND relevancy: using the platforms that customers have the highest affinity with should improve the efficiency and effectiveness of advertising

Most likely to visit retailers vs average internet user

	Facebook		Instagram		X		TikTok		Pinterest		Snapchat	
1	Vinted	+8%	asos	+25%	wetherspoon	+29%	asos	+62%	asos	+80%	asos	+91%
2	eventbrite	+8%	Vinted	+23%	Currys PC World	+27%	SHEIN	+53%	Dunelm	+75%	SHEIN	+85%
3	SHEIN	+8%	SHEIN	+21%	audible	+27%	Uber Eats	+51%	Etsy	+73%	Uber Eats	+74%
4	wetherspoon	+8%	Uber Eats	+20%	hotukdeals	+25%	deliveroo	+44%	SHEIN	+70%	wetherspoon	+65%
5	Too Good To Go	+8%	deliveroo	+20%	Uber Eats	+25%	Vinted	+42%	IKEA	+64%	McDonald's	+63%

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Key takeaways – Social Media

OPPORTUNITY SIZING: SOCIAL LIFE

Young people are spending more than half their online lives on social media. **How do you capitalise on this large, engaged audience? What's your USP if you have to compete with it?**

AUDIENCE PROFILE: YOUR GOLDEN AGE

There are distinct differences in reach and engagement between age groups. Meanwhile, TikTok's audience is maturing. **Do you know the best platform for your brand? How will this change as social media platforms grow and evolve?**

PARTNERSHIPS: TRENDING NEWS

Different news brands have synergies with different social media sites. **Where will your content be amplified the most? Which partnerships can deliver engagement for all parties?**

PARTNERSHIPS: TAILOR-MADE FOR RETAIL

Social media visitors love to shop and are more likely to visit a wide range of top retail sites. **Are you matching the right retailer with the right platform?**

FOR MORE INFORMATION

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Marketing Lead

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APPENDIX

One-page reports

Pinterest

13.5m Total audience
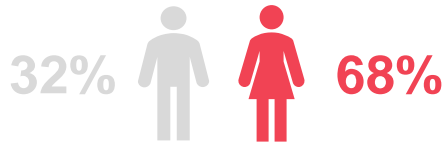
0h 45m Avg time per user

7.6m Web audience

7.5m App audience

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August 23

Gender

32% 👤 👤 **68%**

Social Grade

ABC1 68% Pinterest
64% Total internet

Most likely to agree vs all internet users that…

I spend a lot of money on toiletries and cosmetics (+15%)

Least likely to agree vs all internet users that…

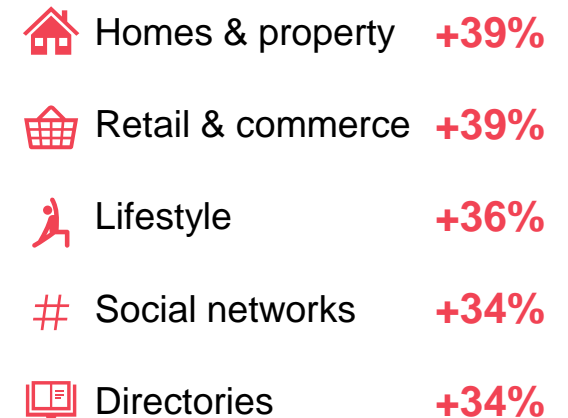I try to keep up with developments in technology (-9%)

Age vs total internet
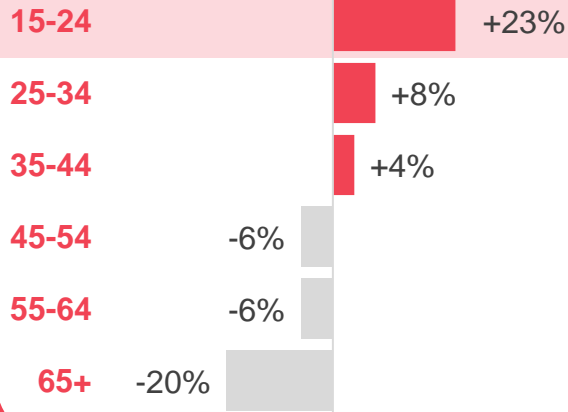
15-24	+23%
25-34	+8%
35-44	+4%
45-54	-6%
55-64	-6%
65+	-20%

Income vs total internet

<£5,000	+4%
£5,000 - £19,999	-1%
£20,000 - £49,999	+5%
£50,000+	-15%

Highest affinity index retailers

asos	**+80%**
Dunelm	**+75%**
Etsy	**+73%**
SHEIN	**+70%**
IKEA	**+64%**

More likely to be heavy visitors of

🏠	Homes & property	**+39%**
🛒	Retail & commerce	**+39%**
🏃	Lifestyle	**+36%**
#	Social networks	**+34%**
📖	Directories	**+34%**

Monthly

Instagram

37.6m Total audience | **6h 02m** Avg time per user | **20.0m** Web audience | **32.6m** App audience

Ipsos

August 23

Gender

46% | **54%**

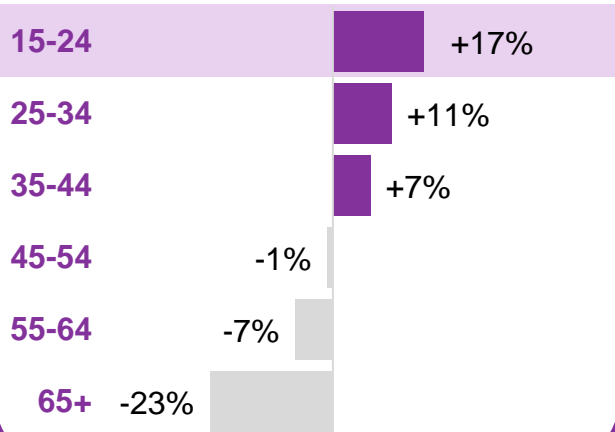## Social Grade

ABC1 65% Instagram
64% Total internet

Most likely to agree vs all internet users that…

I like to go to trendy places to eat and drink (+9%)

Least likely to agree vs all internet users that…

I like to enjoy life and don't worry about the future (-1%)
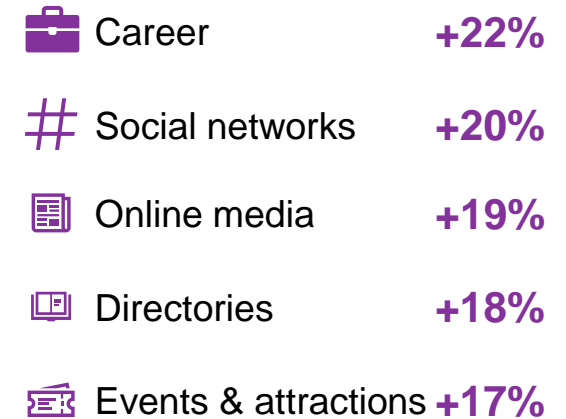
Age vs total internet

Age	
15-24	+17%
25-34	+11%
35-44	+7%
45-54	-1%
55-64	-7%
65+	-23%

Income vs total internet

Income	
<£5,000	+12%
£5,000 - £19,999	-3%
£20,000 - £49,999	+0%
£50,000+	+0%

Highest affinity index retailers

asos	+25%
Vinted	+23%
SHEIN	+21%
Uber Eats	+20%
deliveroo	+20%

More likely to be heavy visitors of

Career	+22%
Social networks	+20%
Online media	+19%
Directories	+18%
Events & attractions	+17%

Monthly

Facebook

45.4m | **12h 52m** | **38.6m** | **40.2m**

Total audience | Avg time per user | Web audience | App audience

Ipsos

August 23

Gender

48% | **52%**

Social Grade

ABC1 | 64% Facebook
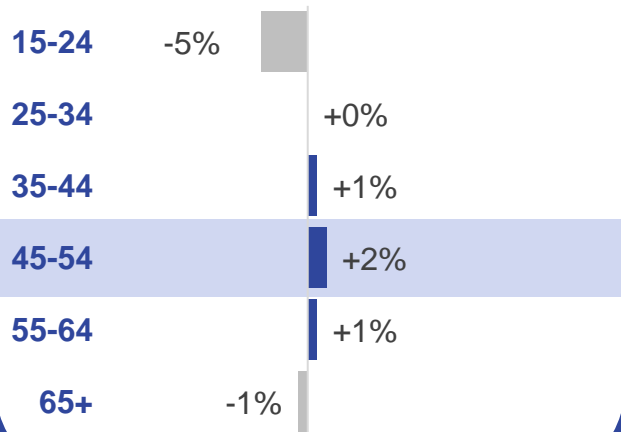64% Total internet
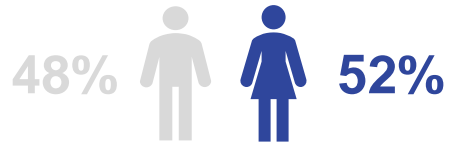
Most likely to agree vs all internet users that…

I change the decorations at home as often as I can (+2%)

Least likely to agree vs all internet users that…

Money is the best measure of success (-3%)

Age vs total internet

15-24	-5%
25-34	+0%
35-44	+1%
45-54	+2%
55-64	+1%
65+	-1%

Income vs total internet

<£5,000	-1%
£5,000 - £19,999	+1%
£20,000 - £49,999	+0%
£50,000+	+0%

Highest affinity index retailers

Vinted	+8%
eventbrite	+8%
SHEIN	+8%
wetherspoon	+8%
Too Good To Go	+8%

More likely to be heavy visitors of

Career	+7%
Events & attractions	+7%
Travel	+7%
Directories	+7%
Retail	+7%

All percentage figures - other than gender and social grade - are indexed versus the total UK internet population.
Source: Ipsos iris Online Audience Measurement Service, August 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s), UK only.

Monthly

X (Twitter)

24.3m | **4h 38m** | **14.5m** | **16.3m**

Total audience | Avg time per user | Web audience | App audience

Ipsos
August 23

Gender

57% 👨 👩 **43%**

Social Grade

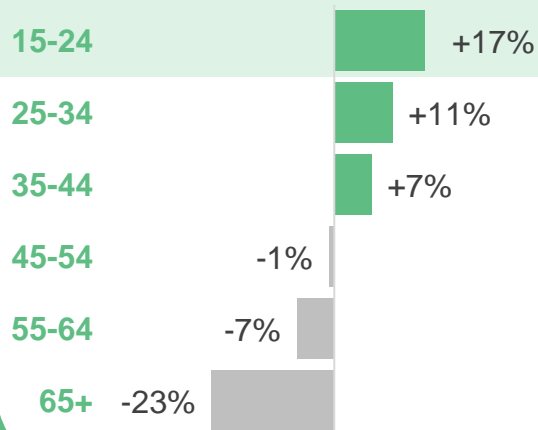**ABC1** [62% X (Twitter)
64% Total internet

Most likely to agree vs all internet users that…

I want to get to the very top in my career (+9%)

Least likely to agree vs all internet users that…

I really look after my health (-6%)

Age vs total internet

15-24	+17%
25-34	+11%
35-44	+7%
45-54	-1%
55-64	-7%
65+	-23%

Income vs total internet

<£5,000	+12%
£5,000 - £19,999	-3%
£20,000 - £49,999	+0%
£50,000+	+0%

Highest affinity index retailers

wetherspoon	+29%
Currys PC World	+27%
audible	+27%
hotukdeals	+25%
Uber Eats	+25%

More likely to be heavy visitors of

⚽ Sports	+34%
🎓 Education	+30%
🎲 Gambling	+28%
💼 Career	+26%
📰 Online media	+23%

All percentage figures - other than gender and social grade - are indexed versus the total UK internet population.
Source: Ipsos iris Online Audience Measurement Service, August 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s), UK only.

Monthly

TikTok

23.9m | **14h 39m** | **12.0m** | **18.5m**
Total audience | Avg time per user | Web audience | App audience
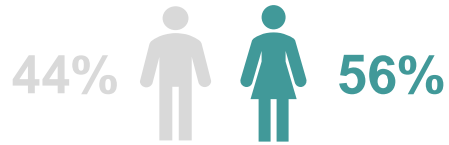
Ipsos

August 23

Gender

44% | **56%**

Social Grade

ABC1
- 61% TikTok
- 64% Total internet

Most likely to agree vs all internet users that…

I spend a lot of money on toiletries and cosmetics (+25%)

Least likely to agree vs all internet users that…

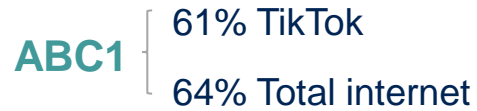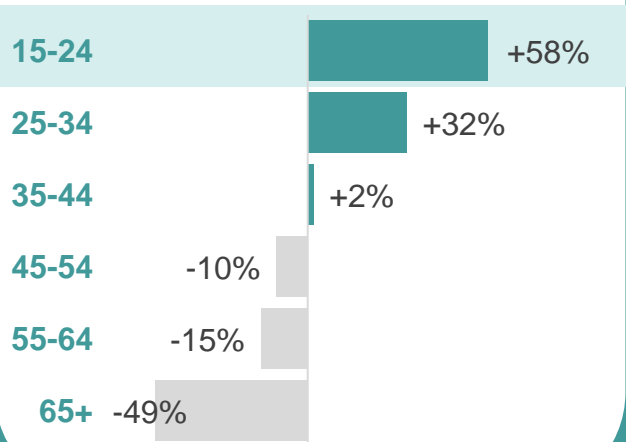I prefer to be active in my leisure time (-7%)

Age vs total internet
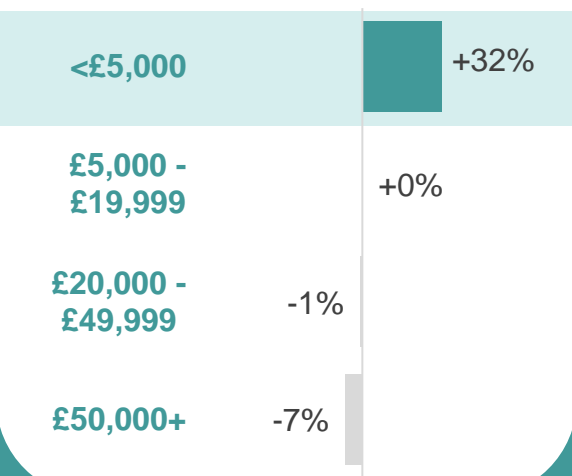
15-24	+58%
25-34	+32%
35-44	+2%
45-54	-10%
55-64	-15%
65+	-49%

Income vs total internet

<£5,000	+32%
£5,000 - £19,999	+0%
£20,000 - £49,999	-1%
£50,000+	-7%

Highest affinity index retailers

asos	+62%
SHEIN	+53%
Uber Eats	+51%
deliveroo	+44%
Vinted	+42%

More likely to be heavy visitors of

Online Media	+45%
Social networks	+44%
Career	+34%
Entertainment	+31%
Events & attractions	+26%

All percentage figures - other than gender and social grade - are indexed versus the total UK internet population.
Source: Ipsos iris Online Audience Measurement Service, August 2023, All aged 15+ using PC/laptop, smartphone or tablet device(s), UK only.

About
Ipsos iris

Key pillars of approach

Establishment survey

10,000 single source passive mobile first multi device panel

DATA SCIENCE
Brings all of this together

Measurement of small sites

Site-centric measurement
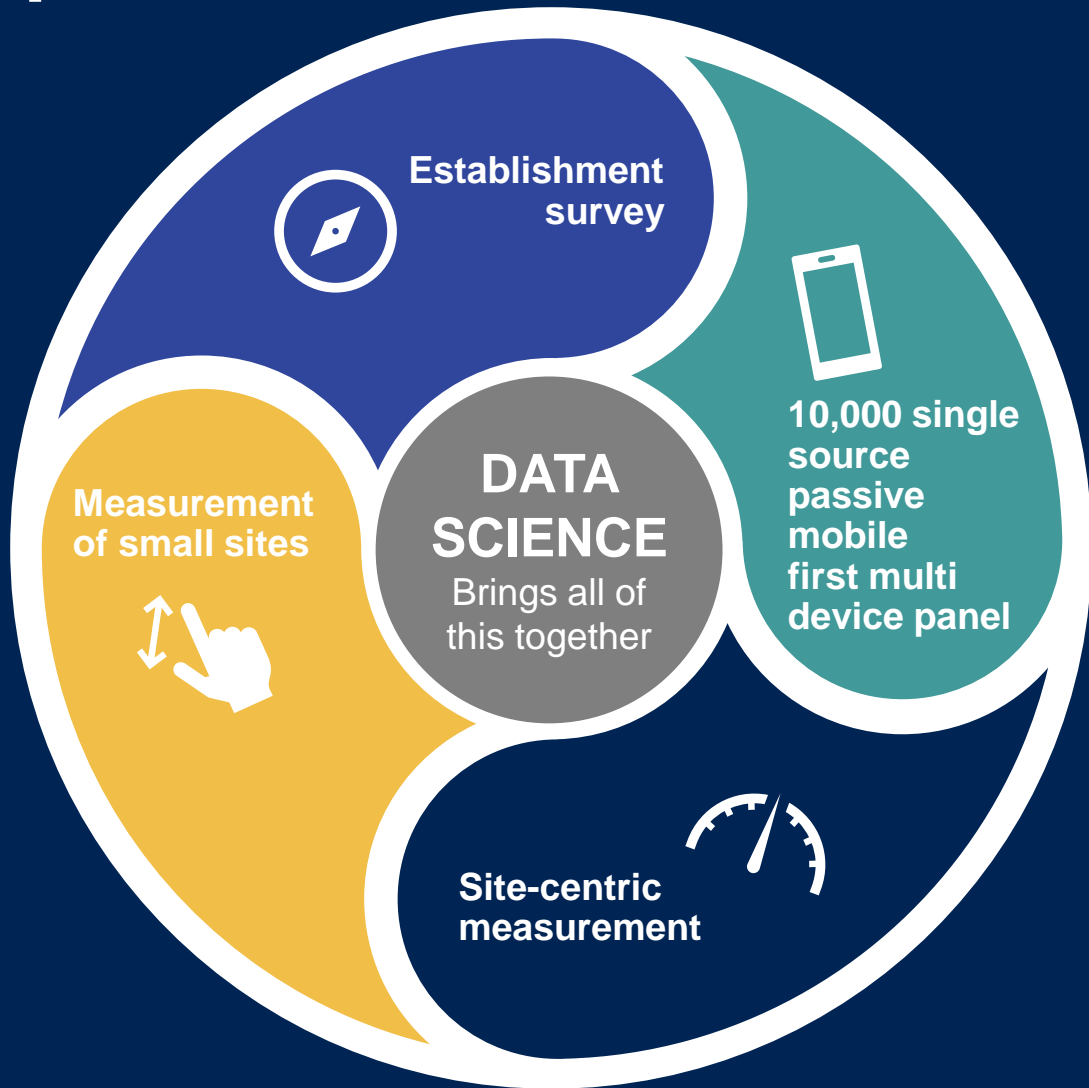
Providing you with these key metrics

Desktop / laptop, smartphone and tablets

Websites, mobile websites and apps
(c7,000 sites and c1,500 apps)

Text and video

Demographic, geographic, and attitudinal audiences

Interest based categorisations
e.g. sport, food, news, technology, finance etc

Enhanced audiences
e.g. ACORN, FRESCO, psychographic segmentation

Monthly data segmented by day of week, weekday, weekend with some time of day analysis

Daily data
(36hrs after)

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Rich profiling and targeting capabilities

Age	Disabilities	Interests
Gender	Children	Live TV days
Sexual orientation	Parent / guardian / grandparent	Live TV hours
Social grade	HH size	Radio days
Ethnicity	Main shopper status	Radio duration
Income	Nation	Regular paper use
Chief income earner	Region (ITV / GOR)	Regular paper duration
CIE working status	Cities & towns	Magazine use
Marital status	Lifestyle statements	Magazine duration

Attitudes underpin behaviour

1.	You should seize opportunities in life when they arise
2.	I find it difficult to balance work, children and social life
3.	I often do things on the spur of the moment
4.	I have a keen sense of adventure
5.	I want to get to the very top in my career
6.	I make a conscious effort to recycle
7.	I would be willing to volunteer my time for a good cause
8.	I take great pleasure in looking after my appearance
9.	I prefer to be active in my leisure time
10.	Money is the best measure of success
11.	I like to go to trendy places to eat and drink
12.	It's worth paying extra for quality goods
13.	I am prepared to pay more for products that make life easier
14.	I buy new products before most of my friends
15.	I only buy products from a company whose ethics I agree with
16.	Celebrities influence my purchase decisions
17.	I would be prepared to pay more for environmentally friendly products

18.	I spend a lot of money on toiletries and cosmetics for personal use
19.	I really look after my health
20.	I wear designer clothes
21.	I like to keep up with the latest fashions
22.	I try to keep up with developments in technology
23.	I change the decorations at home as often as I can
24.	I am passionate about travelling
25.	With a credit card I can buy the sort of things I couldn't normally afford
26.	I look for profitable ways to invest my money
27.	I like different people, cultures, ideas and lifestyles around me
28.	I am increasingly aware of the price of goods and services
29.	I like to enjoy life and don't worry about the future
30.	I am interested in any technology that saves me time
31.	I find it hard to find time to relax
32.	Online TV streaming services have changed the way I watch television
33.	I'm prepared to make lifestyle compromises to benefit the environment
34.	I make more purchases online than I do in store

UKOM

Ipsos

Reports available

Media

Analyse media entities by target group. The results are based on your selection and category filters.

Media Plus

A flat reporting structure. The results are static and not based on your selection and category filters.

Category

Analyse top categories performance during selected months.

Profiling

Identify the profile composition of selected media.

Ranking

Rank organisations, brands, websites and apps.

Cross-visiting

Analyse cross visitation and duplication of audiences between different media entities.

% Change

Analyse the differences and changes between different time period.

Dayparts

See the breakdown of the selected media or category by time-of-day.

Trend Analysis

Check the performance of the selected media through multiple period of times.

Methodology

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

Ipsos iris is the 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.
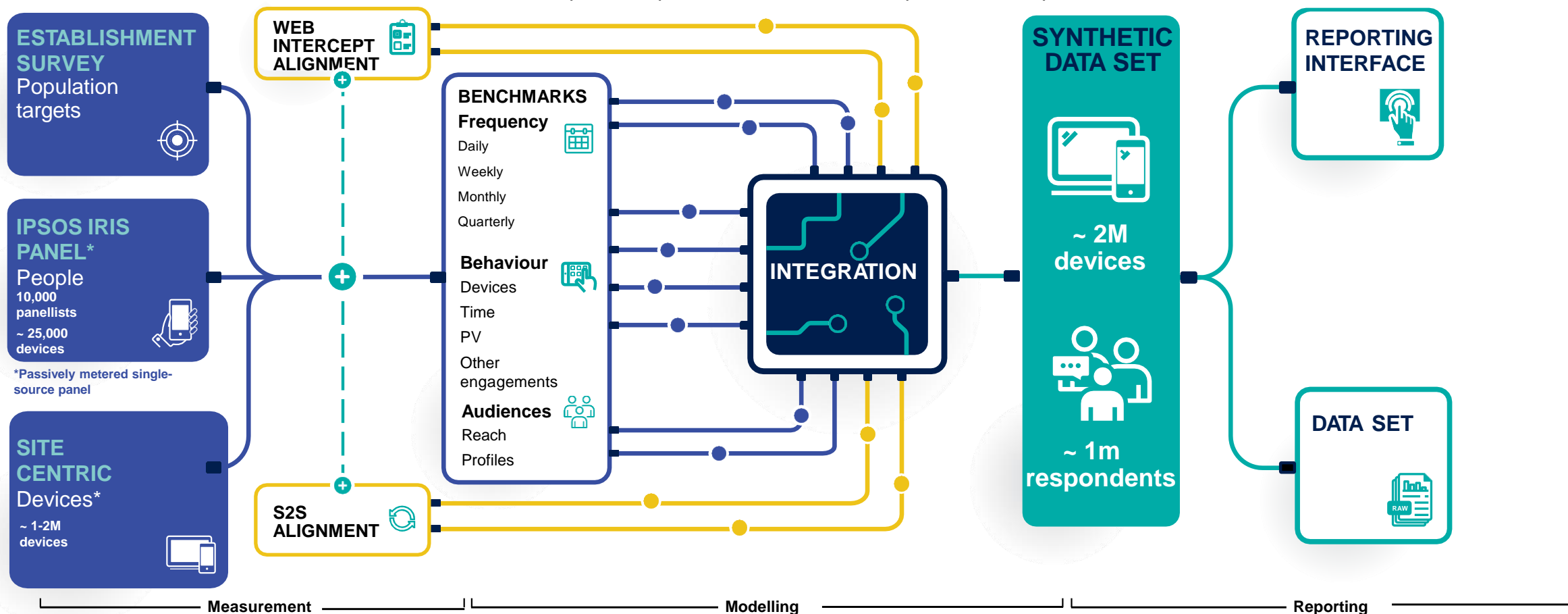
Due to Ipsos iris being a synthetic dataset, it is not possible to provide confidence intervals/ranges for extrapolated population estimates. However, it should be noted that all extrapolated population figures provided are estimates that will have some margin of error.
More detail on the methodology can be find at: https://ukom.uk.net/ipsos-iris-overview.php

Core KPIs iris tracks

Reach	Time spent	Page views / visits	Composition / index	Video	Duplication
Audience (000s)	Total mins (MM)	Page views (MM)	Audience composition (%)	Video audience (000s)	Cross audience (000s)
Audience reach (%)	Avg. mins pp	Avg. pvs pp	Pvs composition (%)	Video audience reach (%)	Cross audience (%)
Avg. daily audience (000s)	Avg. daily mins (MM)	Avg. pvs (daily)	Mins composition (%)	Video mins (MM)	Exclusive audience (000s)
Avg. daily audience reach (%)	Avg. daily mins pp	Avg. pvs pp (daily)	Audience affinity index	Video views (MM)	Exclusive audience (%)
Audience shr. (%)	Avg. mins per pvs	Pvs shr. (%)	Pvs affinity index	Av mins per video	Exclusive audience share (%)
	Mins shr. (%)	Visits (000s)	Mins affinity index	Av video views pp	Audience duplication (000s)
	Avg. mins per visit	Avg. visits pp	Visits composition (%)	Av video views pv	Audience duplication (%)
		Avg. pvs (visit)	Visits affinity index	Video audience affinity index	
		Avg. daily visits		Video audience composition (%)	
		Avg. daily visits pp		Video mins affinity index	
		Visits shr. (%)		Video mins composition (%)	
				Video views affinity index	
				Video views composition (%)	

(Coming soon metrics in orange)