IPSOS IRIS: THE ONLINE LIVES OF 15-24S

May 2025

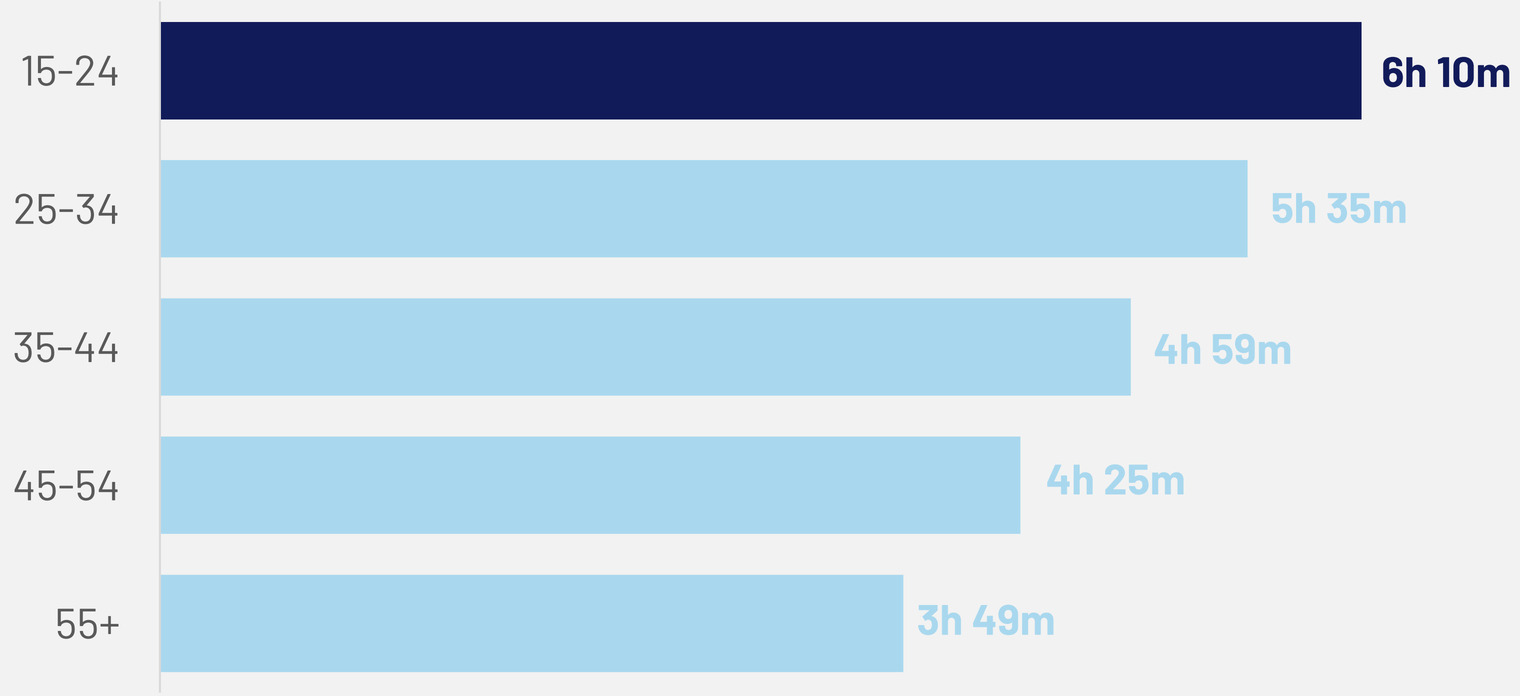
Contents

1

ONLINE OVERVIEW

15-24s spend over a third of their waking lives online – more than any other age group

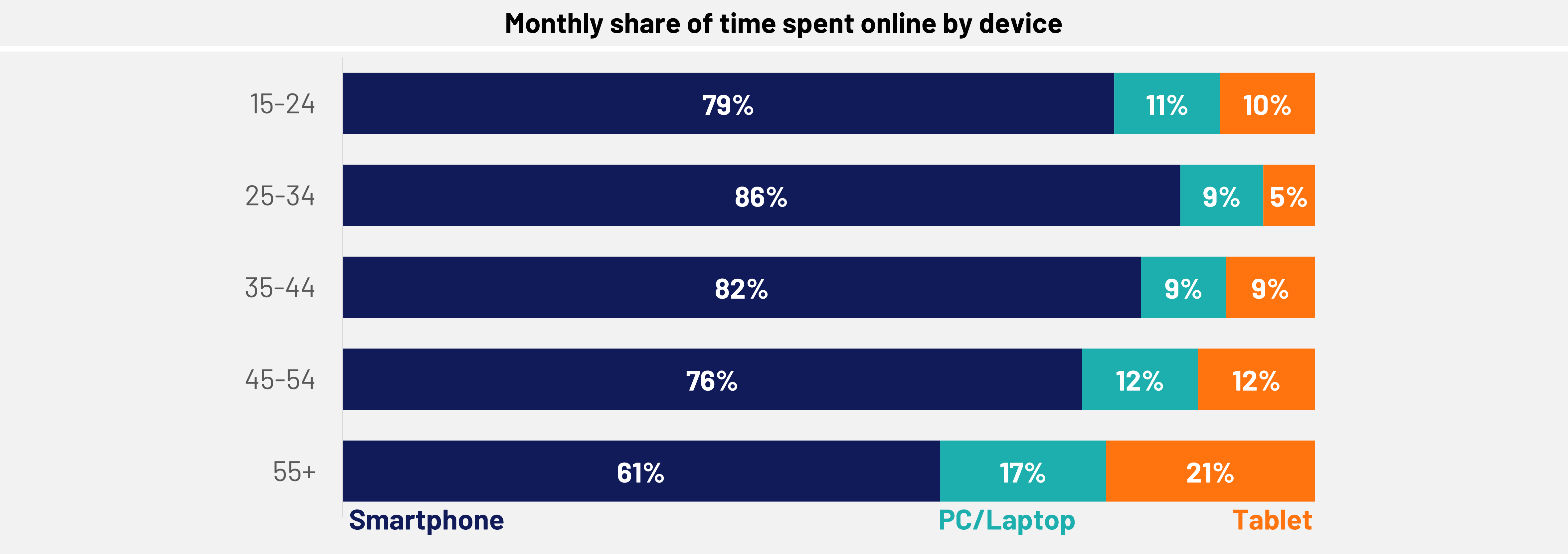
Average time spent online each day by internet users



Assumes 8 hours of sleep per night

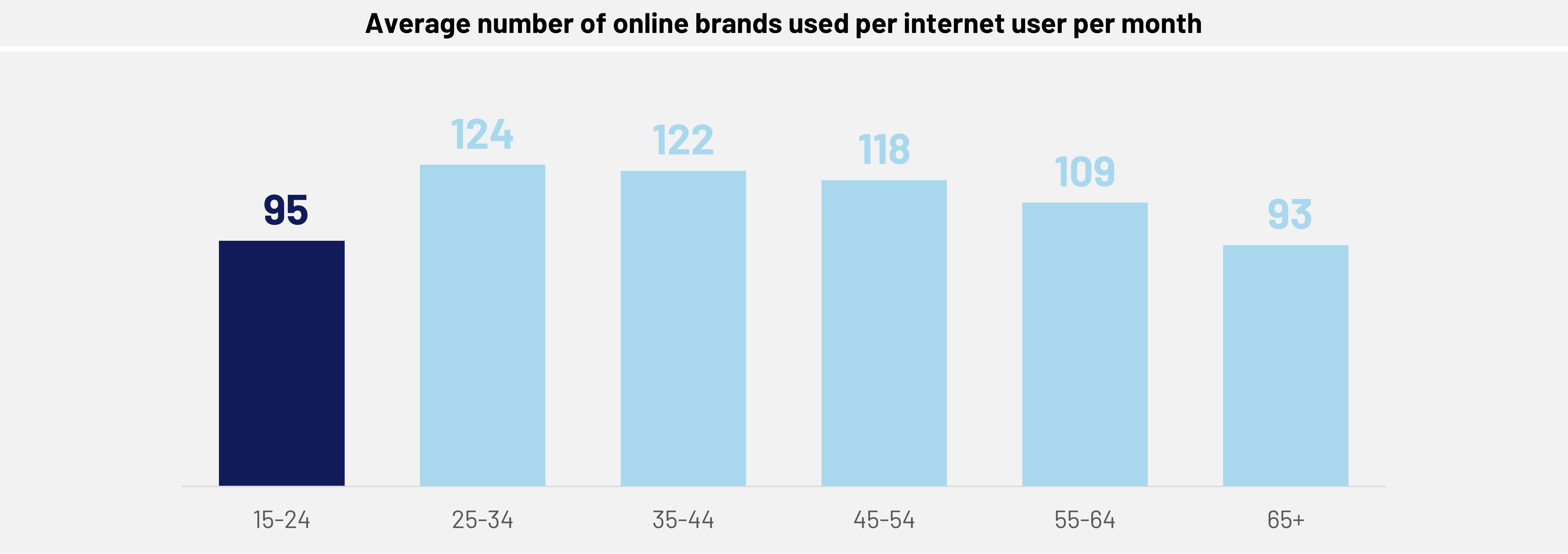
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

15-24s are mobile-first, but other devices have a role



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

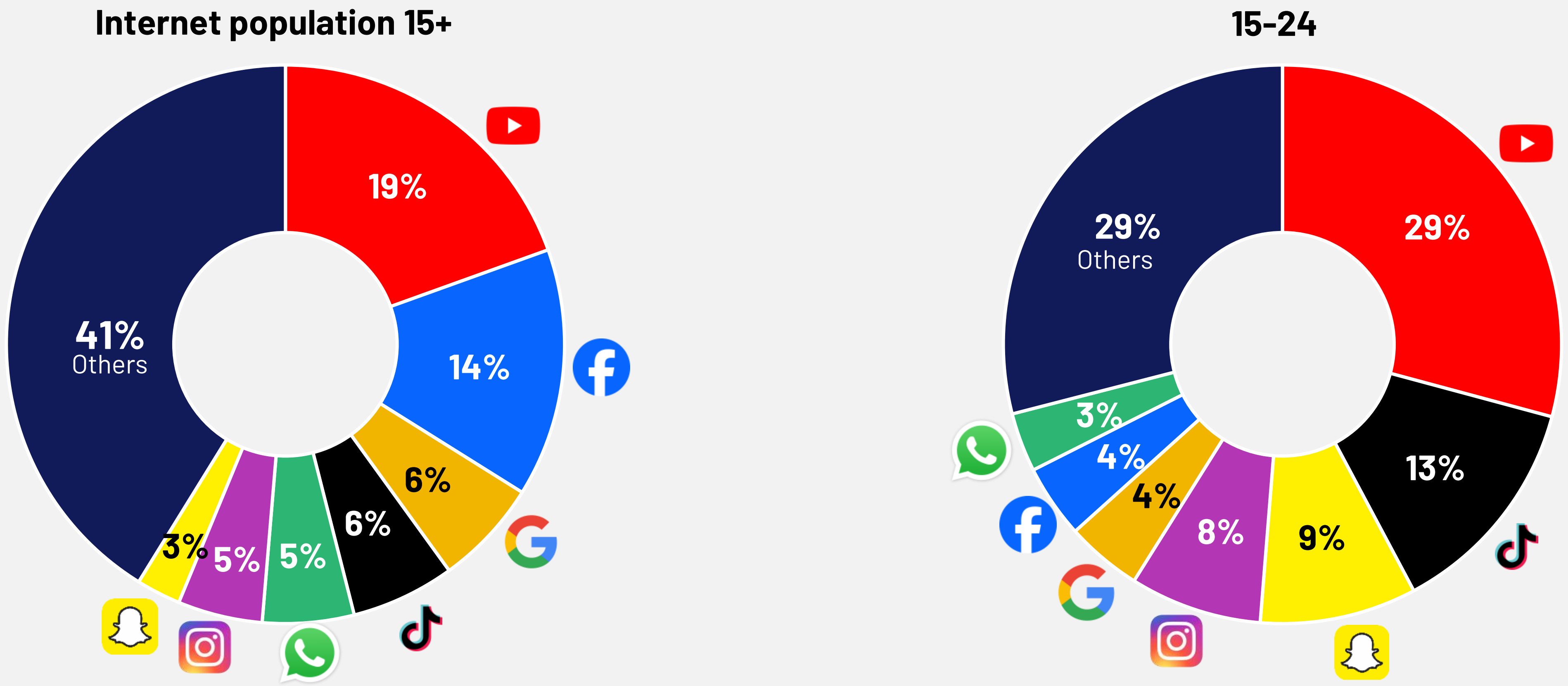
Their online usage may be deeper, but it's less broad than older generations



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

In fact, brands account for over half of all time spent online for 15-24s

Share of total time spent online



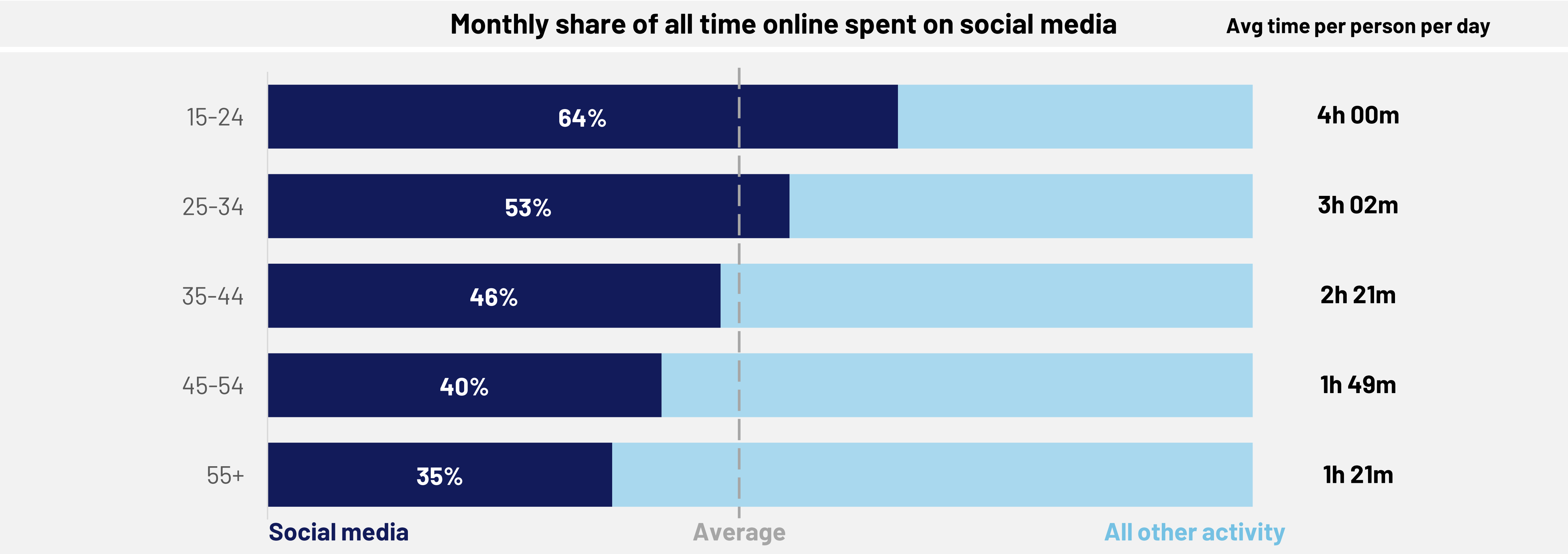
Note: covers foreground activity, so background listening on apps like Spotify is not measured

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

2

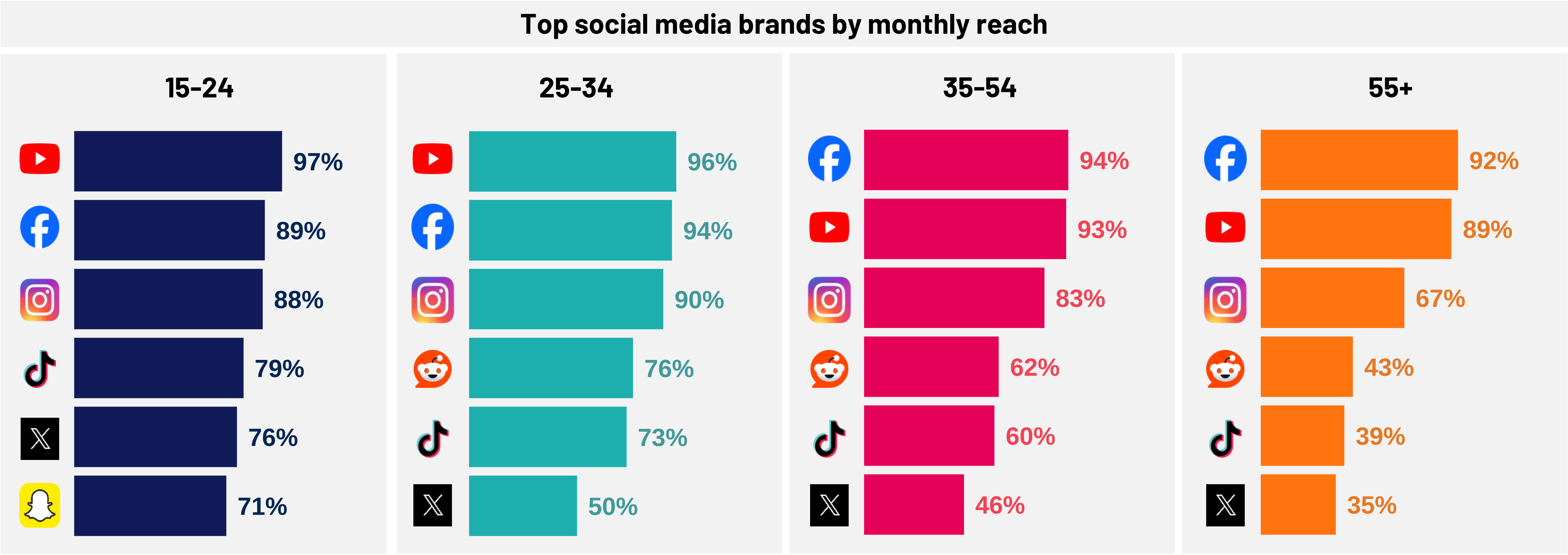
GOING SOCIAL

Social media accounts for nearly two thirds of all time spent online for 15-24s



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

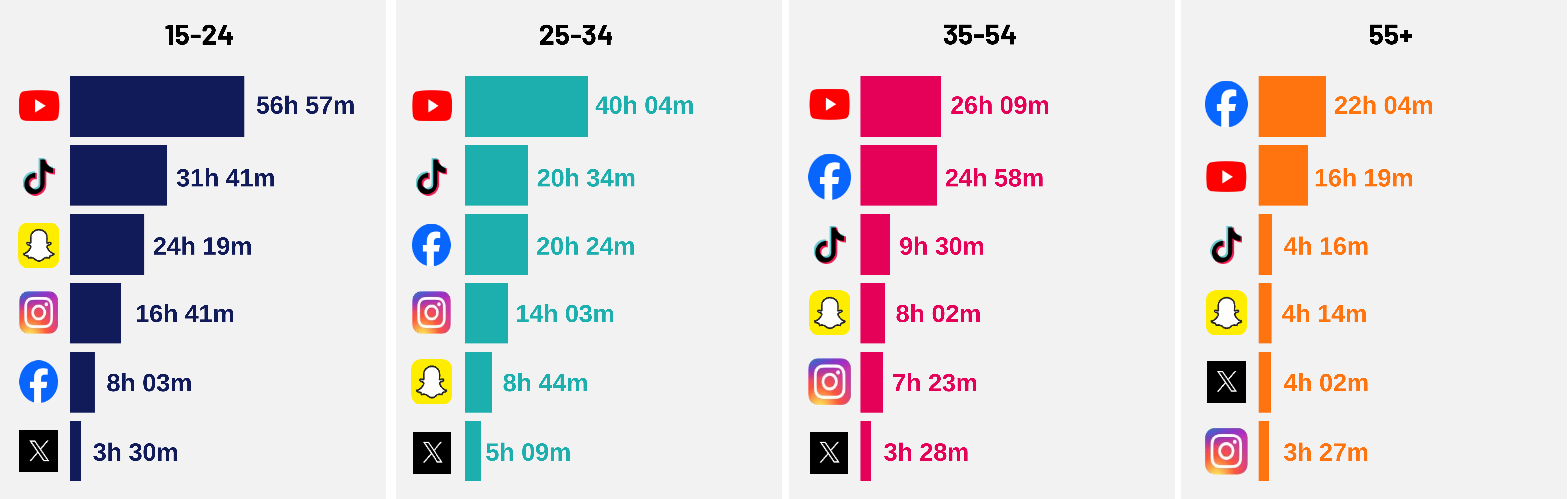
YouTube reaches nearly all 15-24 year olds, while Facebook is still the second biggest social media brand by reach



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

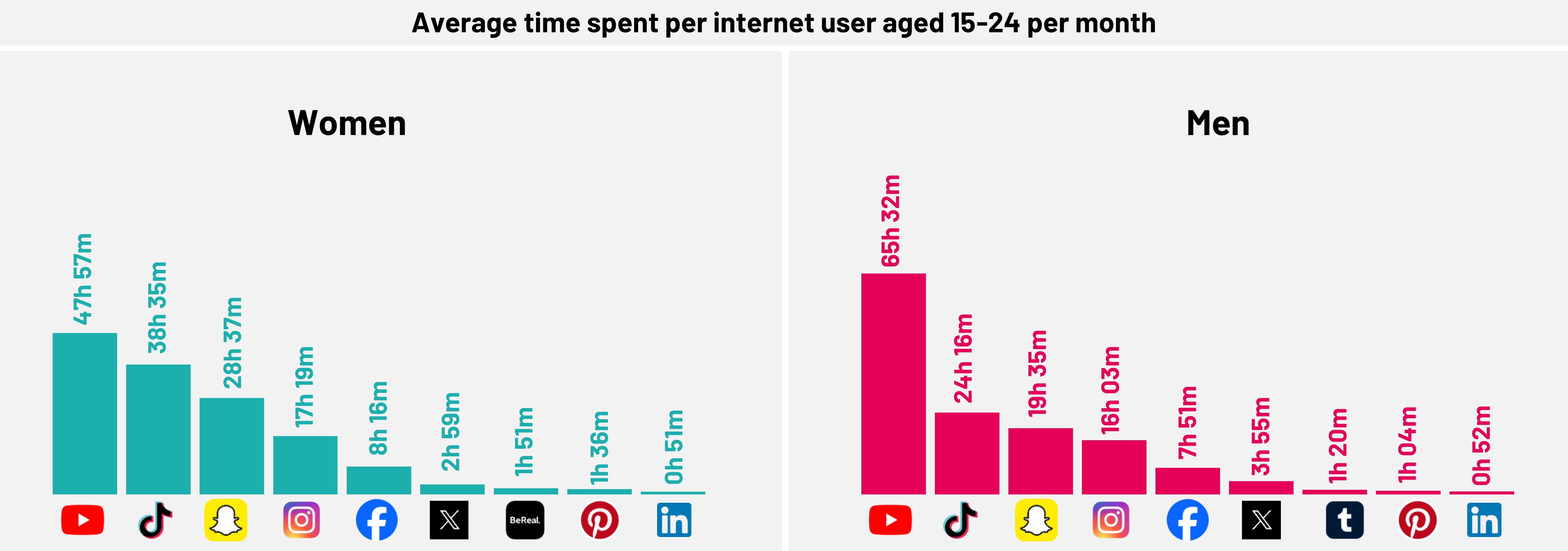
Engagement is a different picture: TikTok and Snap have very high engagement among 15-24s

Average time spent per internet user on social media brands per month



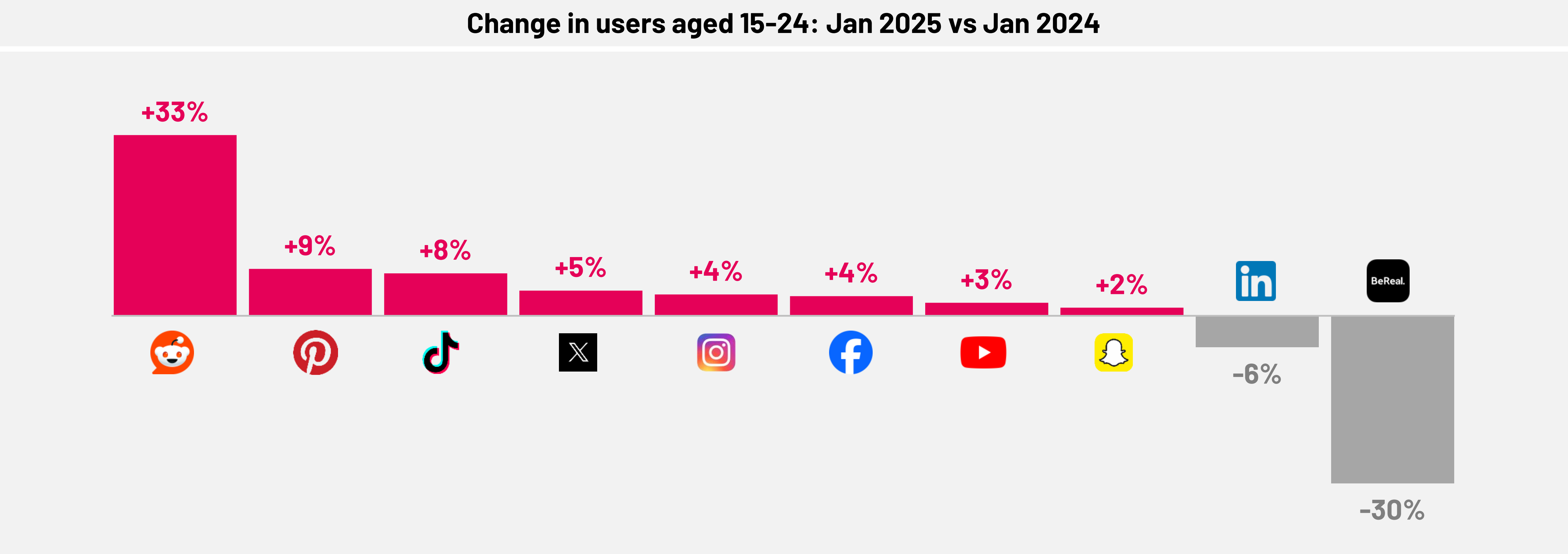
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Women spend more time on the majority of social media brands, but men spend significantly longer on YouTube



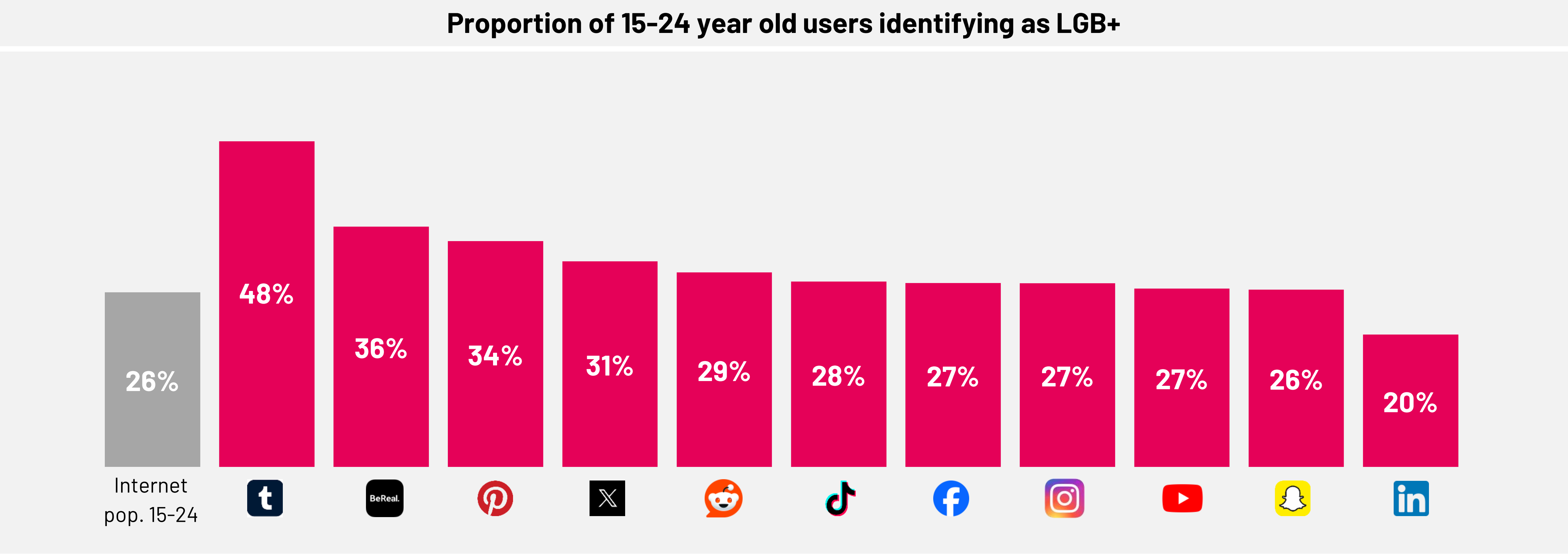
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

The social media landscape continues to shift: Reddit has seen rapid growth over the last year, while BeReal has faded



Source: Ipsos iris Online Audience Measurement Service, Jan '24 vs Jan '25. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Social media provides a great channel to reach LGB+ youth; smaller platforms cultivate communities



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

3

MEDIA WORLD

There are a range of channels that are great for reaching young audiences

Audience reach by media

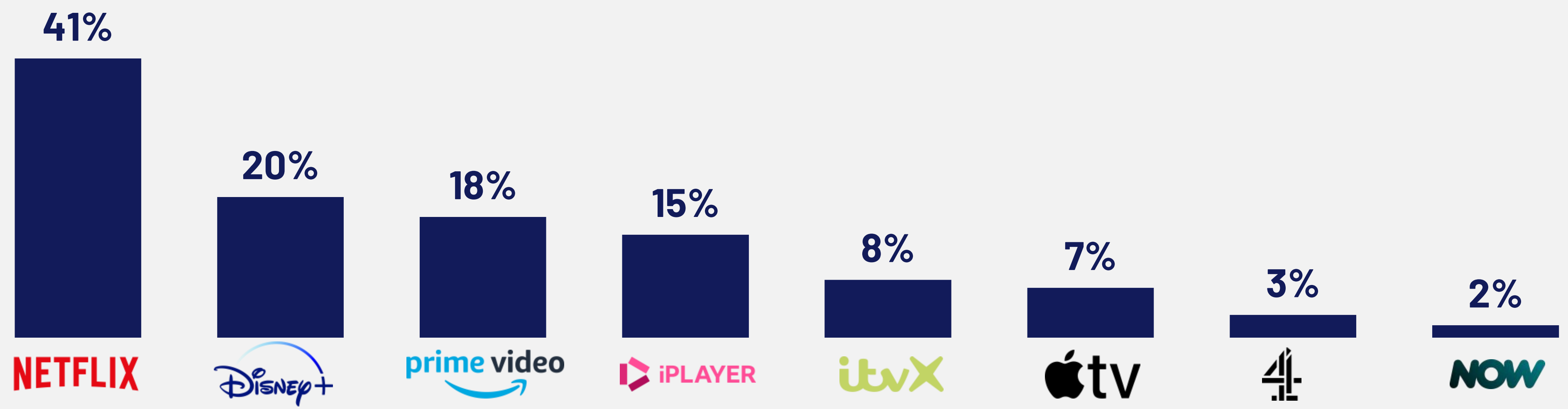
News	Audio & radio	TV	Mobile gaming
94%	91%	87%	62%

Here 'TV' covers all subcategories (e.g. BVOD, SVOD, Live TV) except for VSPs (e.g. YouTube, TikTok). It does not include CTV viewing. Audio is Online Radio and Audio (e.g Spotify, Apple Music). See Appendix for full definitions.

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Netflix has the biggest reach among young people; Disney+ has the highest affinity

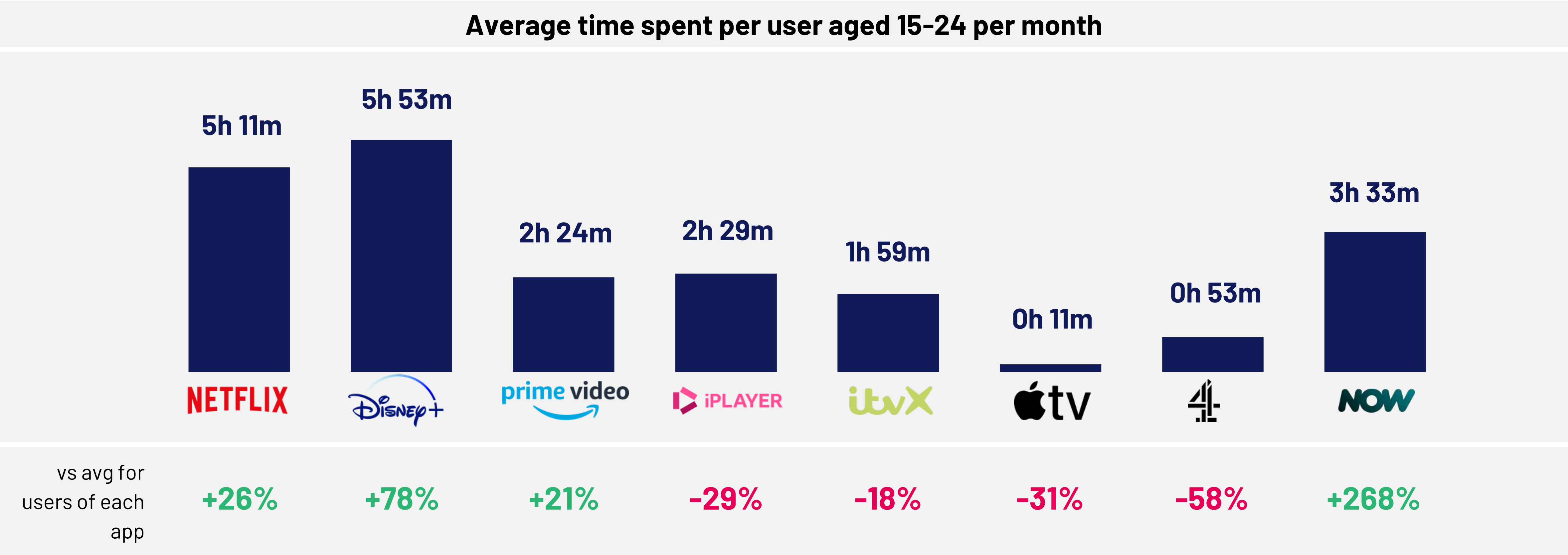
Reach of TV apps among 15-24s



	Netflix	Disney+	prime video	iPLAYER	itvX	Apple tv	Channel 4	NOW
Index vs all internet users	+28%	+53%	+9%	-28%	-15%	-14%	-47%	-32%

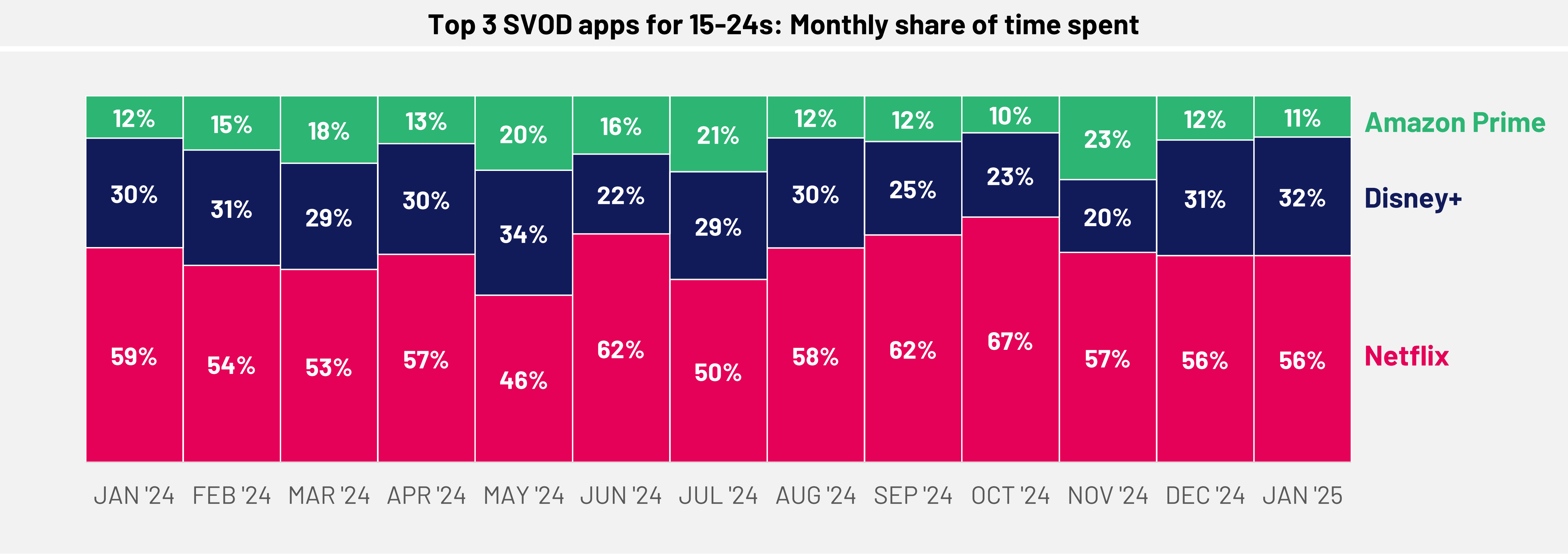
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

On average, 15-24 year olds spend longest on Disney+, followed by Netflix



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

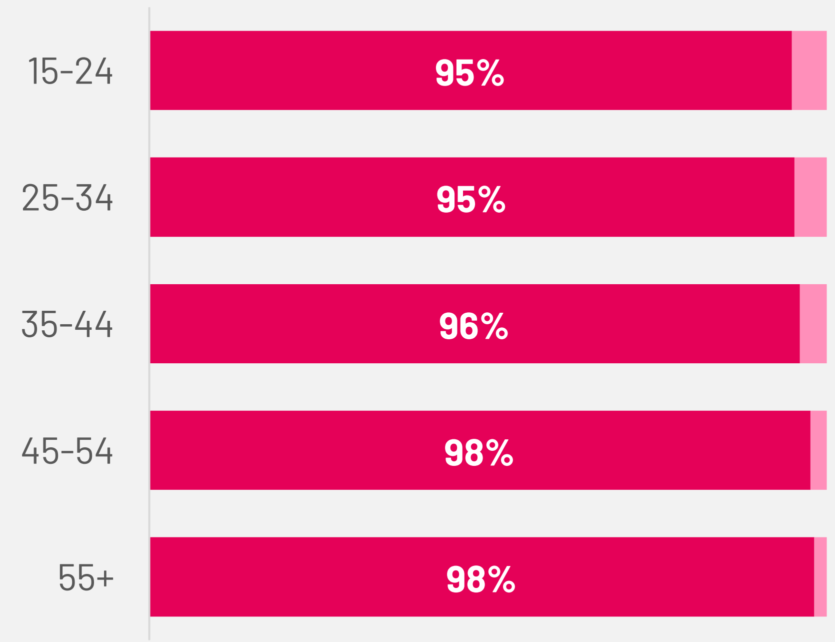
Despite increasing competition, Netflix is still the biggest SVOD app by a margin



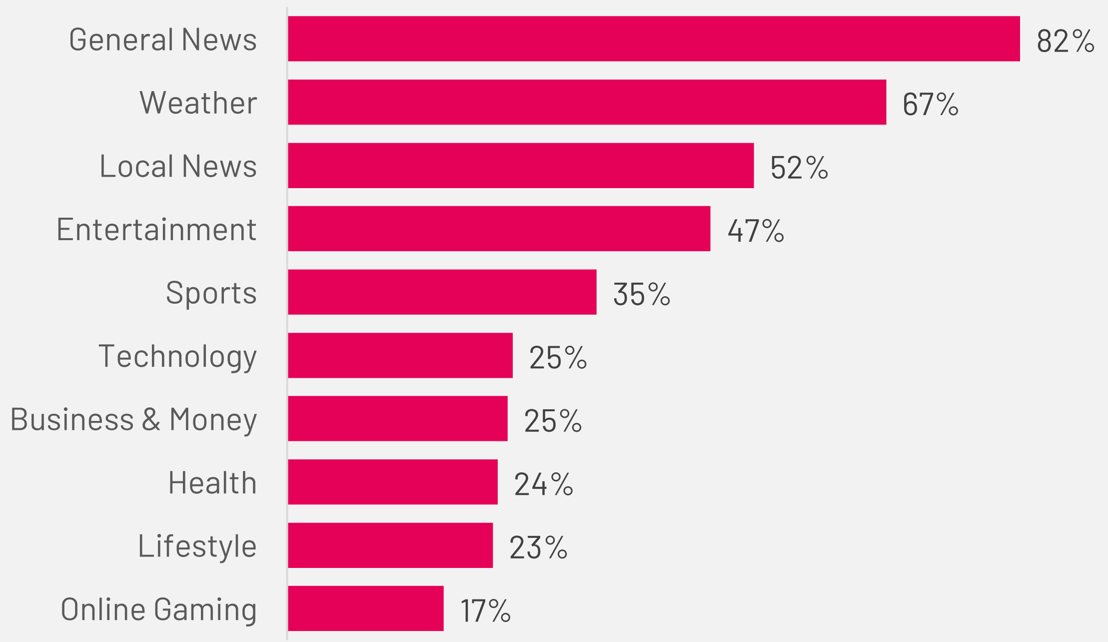
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

News has extensive reach, and young audiences are no exception

Monthly reach of online news category



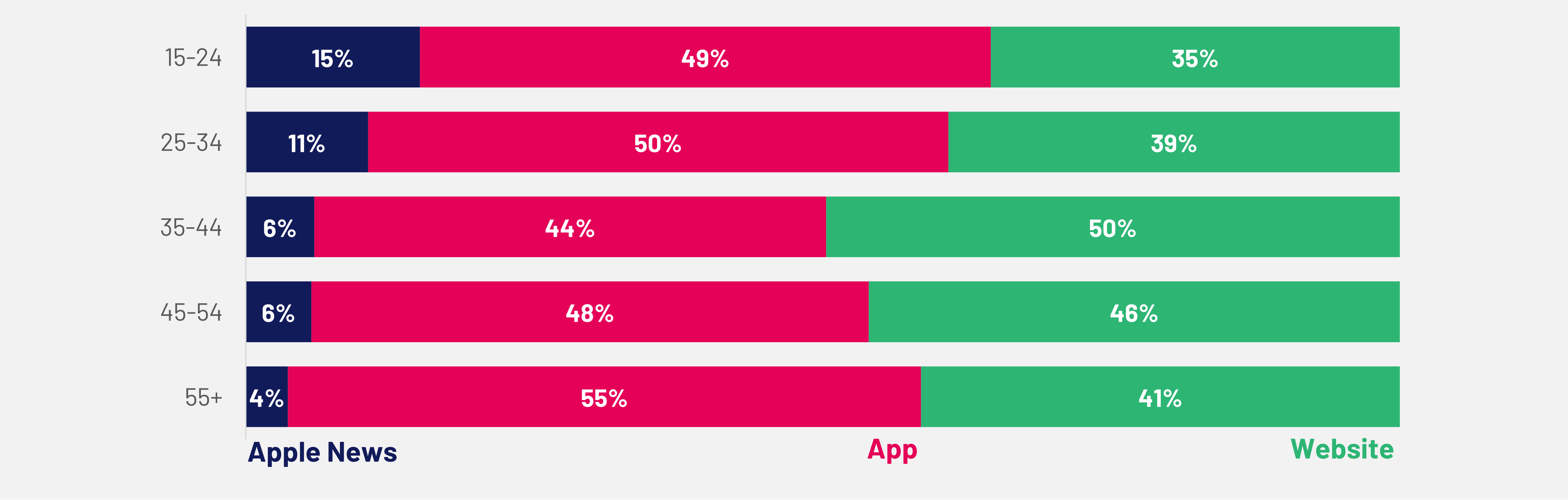
Top 10 news categories by monthly reach: 15-24s



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

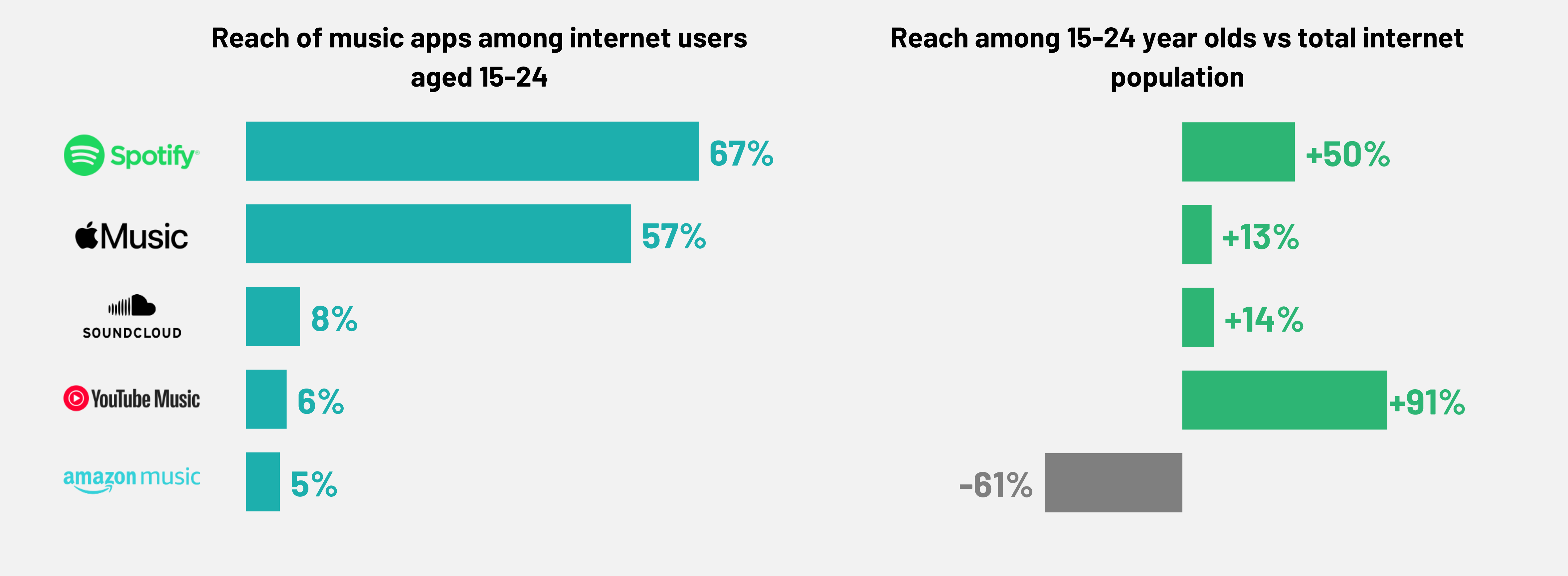
App accounts for the majority of time spent across most age groups, but distributed content like Apple News is important for young people

Monthly share of time spent by news platform



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

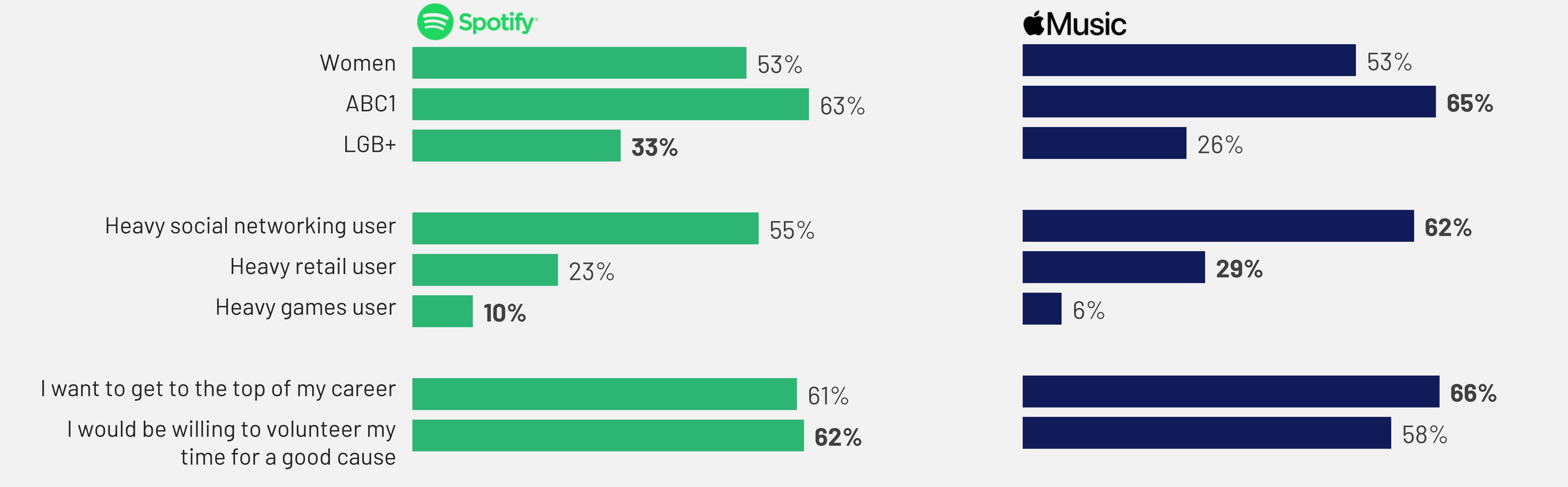
The Spotify app has the largest audience, and also one of the highest affinities among younger audiences



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

Despite similar demographic profiles, attitudes and wider online habits can help distinguish Spotify and Apple Music users

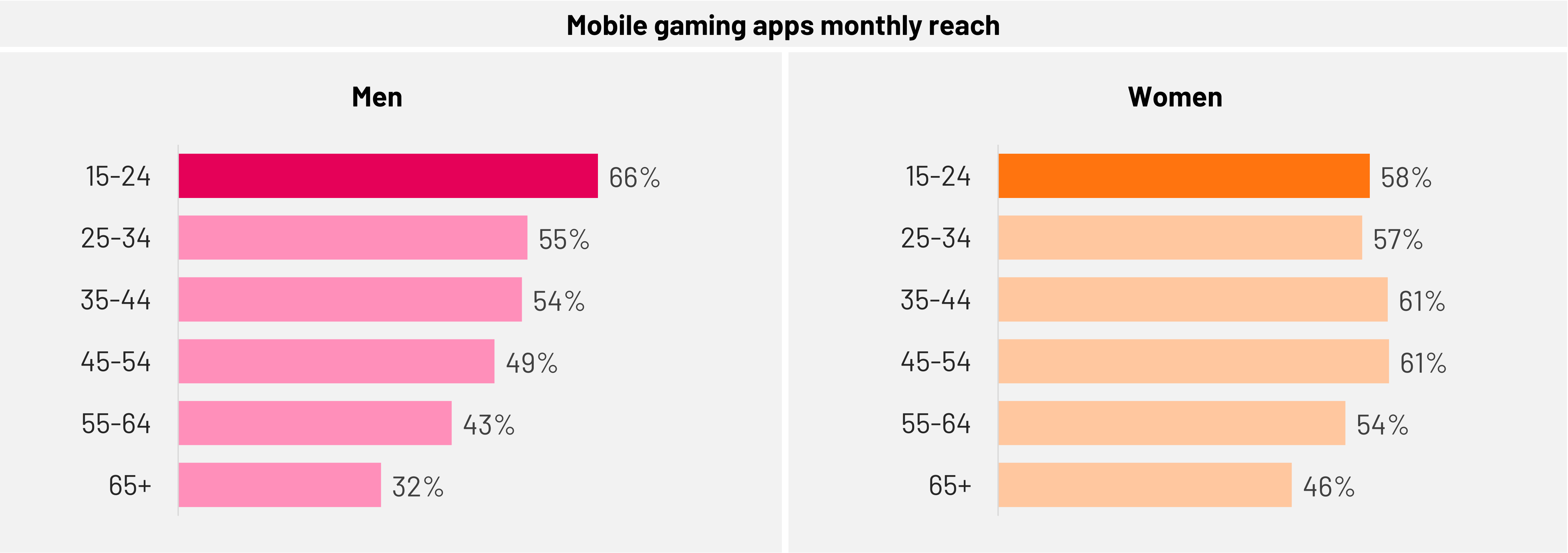
Audience composition among 15-24 year old app users



'Heavy' users are in the top 20% for time spent in a category

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

Mobile gaming is particularly good for reaching young men, with two thirds playing each month



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

Roblox is by far the biggest mobile game, reaching around twice as men young people as the next biggest game

Top 5 mobile games by monthly reach

Total internet population 15+	
Roblox	5%
Candy Crush Saga	4%
Monopoly Go	4%
Pokémon Go	4%
Royal Match	3%

15-24 - Men	
Roblox	15%
Pokémon Go	8%
Clash Royale	6%
Chess – Play & Learn	6%
8 Ball Pool	5%

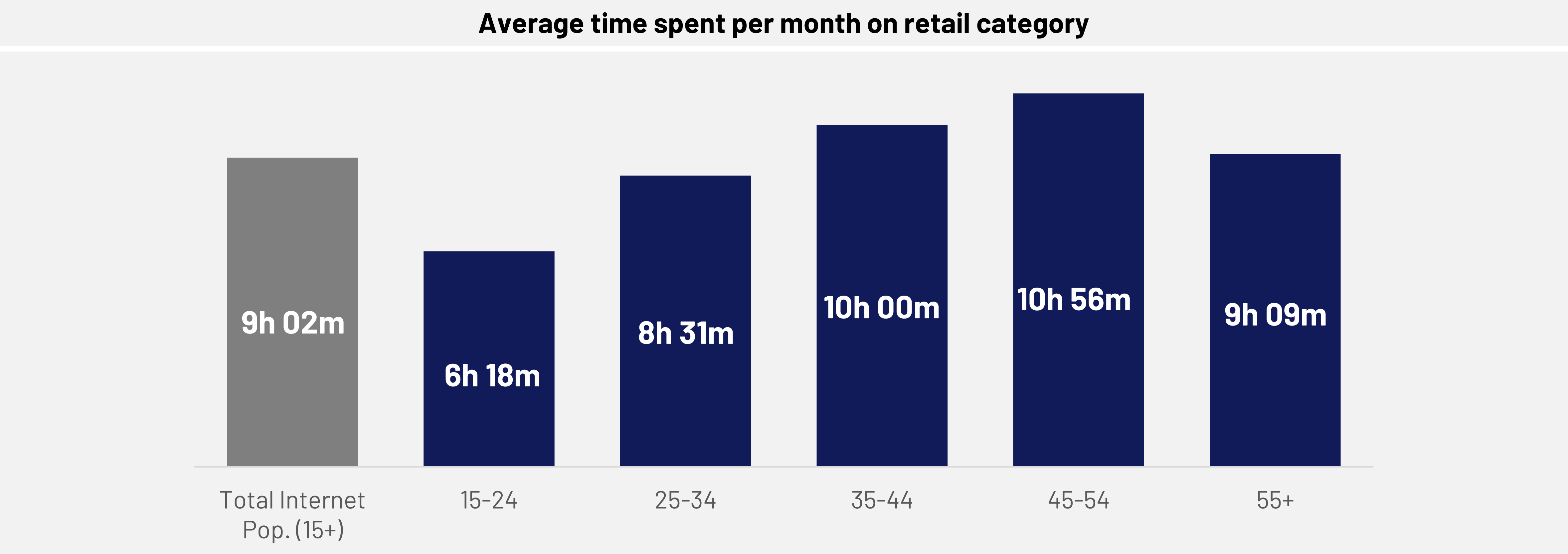
15-24 - Women	
Roblox	11%
Pokémon Go	5%
Dominoes	5%
Crossword Puzzle Redstone	5%
8 Ball Pool	4%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using smartphone or tablet device(s).

4

RETAIL HABITS

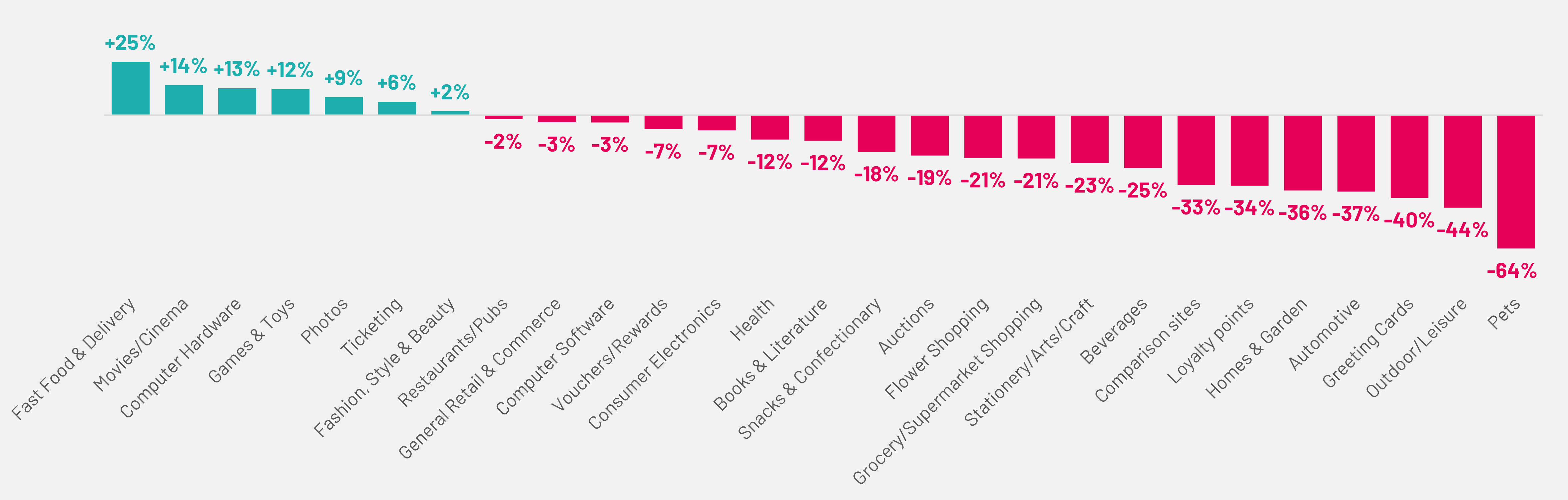
Young people spend the least time visiting retail sites and apps



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Young people favour fast food and films – but less time on retail means few categories where they're over-represented

Likelihood of 15-24 year olds to visit retail categories vs total internet population



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

The biggest brands cross generations; fashion and fast food have greater presence among younger audiences

Top 10 retail brands online

1	amazon	44.7m	6	TESCO	18.9m
2	ebay	32.1m	7	ASDA	16.2m
3	TEMU	23.6m	8	MARKS & SPENCER	14.9m
4	Apple	22.6m	9	Boots	14.4m
5	Argos	19.6m	10	LIDL	14.1m

Top 10 retail brands for 15-24s

1	amazon	6.5m	6	Uber Eats	2.6m
2	ebay	3.9m	7	Vinted	2.6m
3	Apple	3.6m	8	McDonald's	2.5m
4	TEMU	3.2m	9	SHEIN	2.4m
5	TESCO	3.0m	10	Argos	2.4m

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

The most engaged with retailers for young people are all digital-only; it's also populated with disruptors like Temu, Shein and AliExpress

Top 10 retail brands online by avg time spent pp

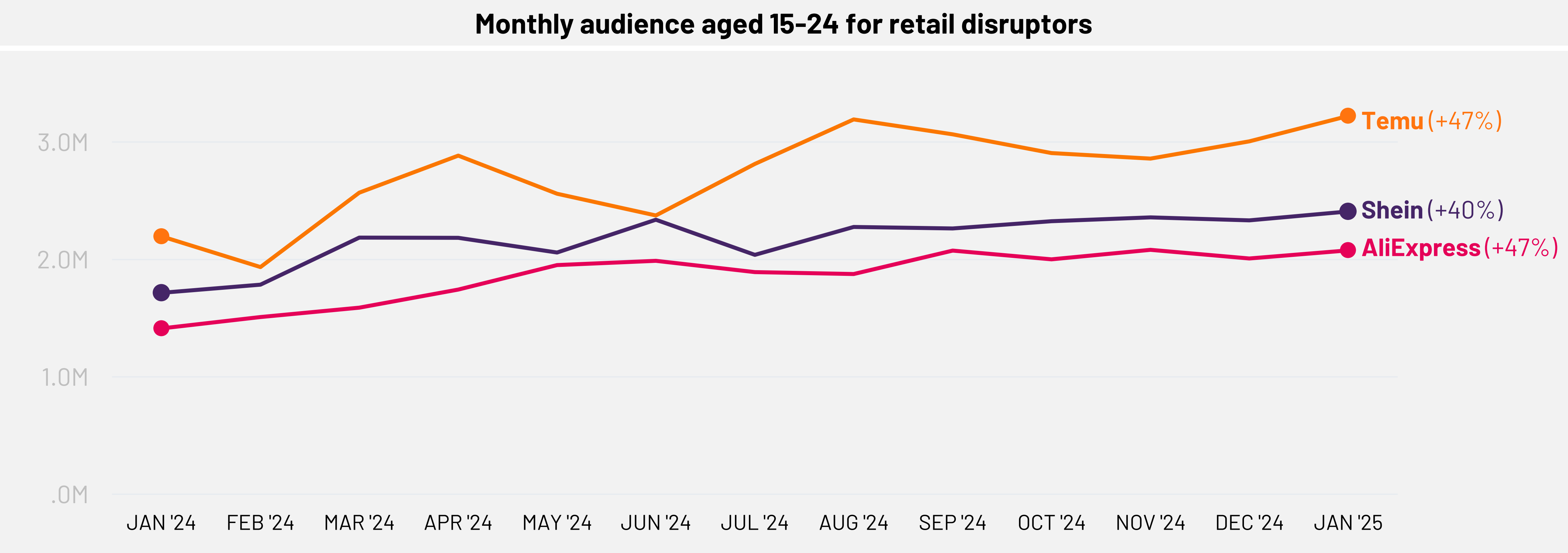
Rank	Brand	Avg time spent pp
1	Vinted	2h 26m
2	amazon	2h 10m
3	audible	2h 06m
4	SHEIN	1h 56m
5	ebay	1h 27m
6	TEMU	1h 12m
7	AliExpress	0h 45m
8	JUST EAT	0h 30m
9	Uber Eats	0h 27m
10	TESCO	0h 24m

Top 10 retail brands for 15-24s by avg time spent pp

Rank	Brand	Avg time spent pp
1	SHEIN	2h 02m
2	Vinted	1h 34m
3	amazon	1h 13m
4	ebay	0h 45m
5	AliExpress	0h 45m
6	JUST EAT	0h 40m
7	TEMU	0h 36m
8	Uber Eats	0h 26m
9	asos	0h 23m
10	depop	0h 21m

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Low-price retailers have grown reach among younger audiences over the last year



Source: Ipsos iris Online Audience Measurement Service, Jan '24 – Jan '25. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Shein has a particularly young, fashionable and female audience; Temu is looking to match its penetration of older demographics

Index: 15-24 year olds users vs all internet users 15-24

	Female	LGB+	I would be prepared to pay more for environmentally friendly products	Celebrities influence my purchase decisions	I like to keep up with the latest fashions
TEMU	+9%	-8%	**+9%**	-3%	-3%
SHEIN	**+46%**	-23%	+7%	**+36%**	**+20%**
AliExpress	+10%	-3%	-5%	+17%	+15%

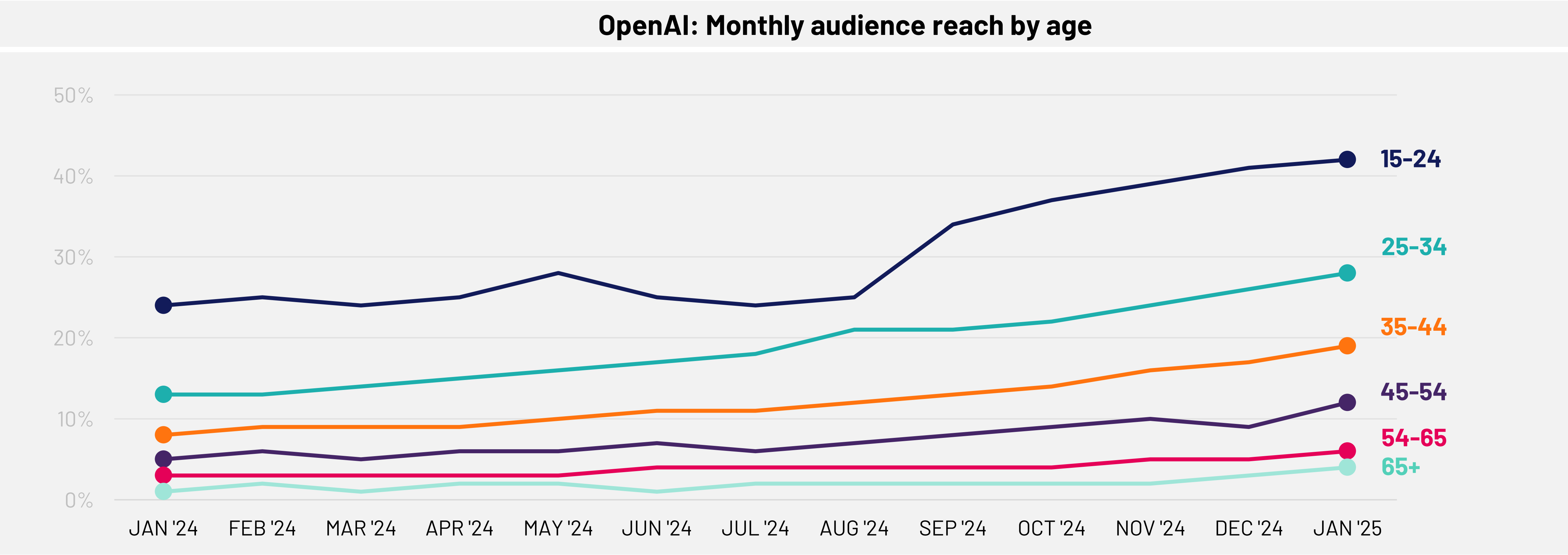
'The three statements are net agree: definitely agree or slightly agree

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

5

EMERGING TRENDS

15-24s are early adopters: they are by far the biggest users of OpenAI

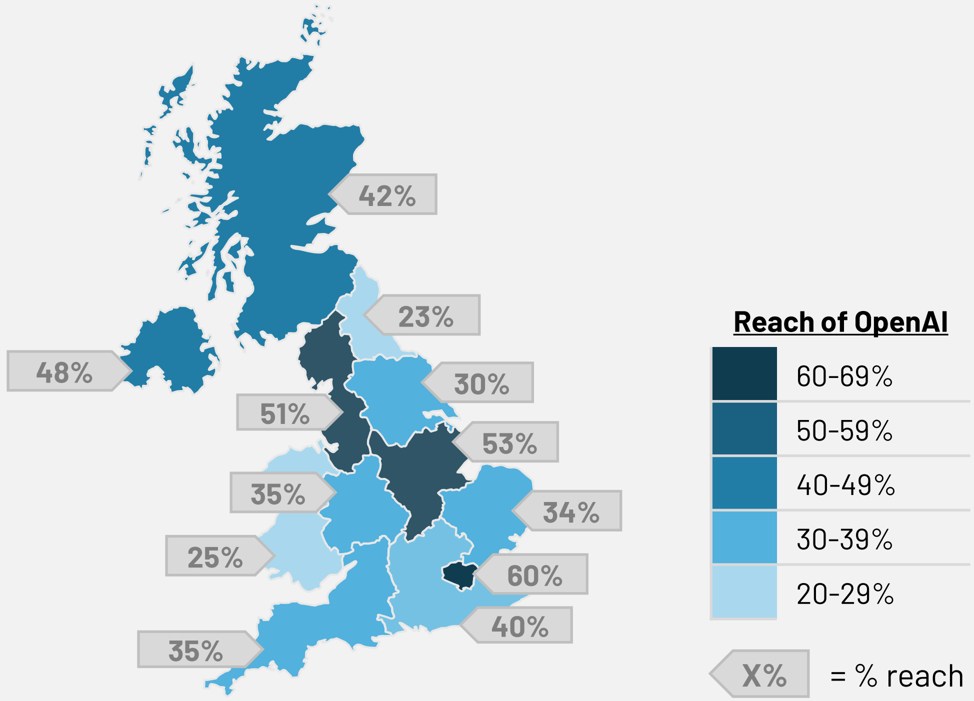


Source: Ipsos iris Online Audience Measurement Service, Jan '24 – Jan '25. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

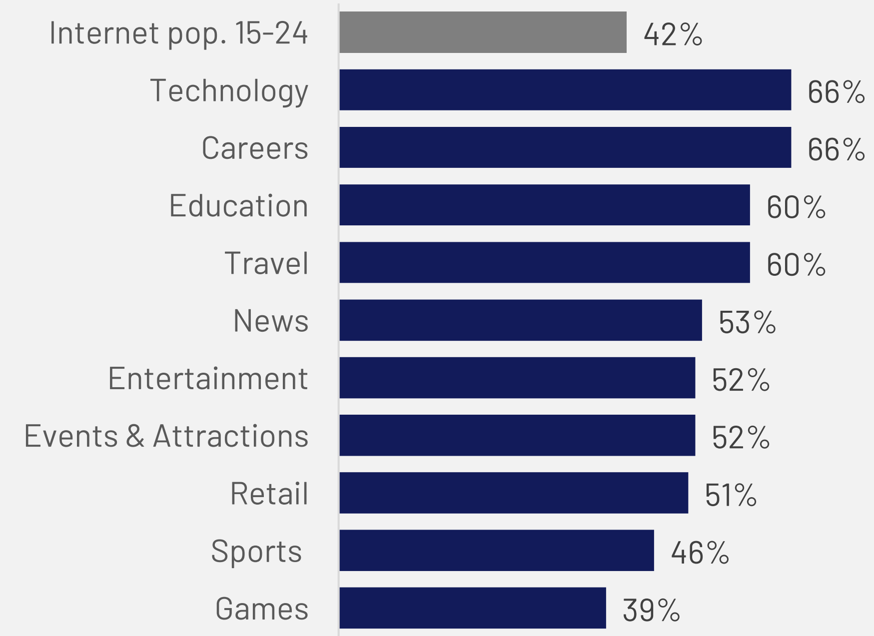
Work and study fuels AI usage amongst young people: reach is highest in London, as well as among heavy careers and education visitors

Among internet users aged 15-24

OpenAI's reach by UK region



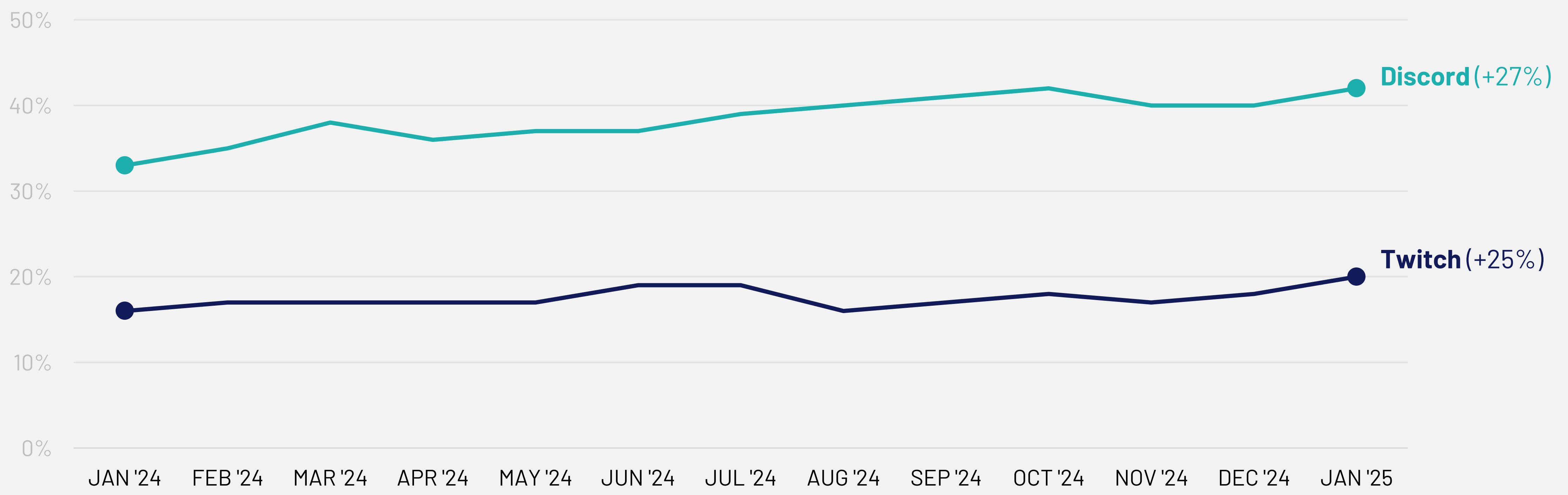
OpenAI's reach among heavy visitors of...



Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Online gaming is going social: both Discord and Twitch have seen significant year-on-year growth

Gaming platforms: Monthly audience reach



Source: Ipsos iris Online Audience Measurement Service, Jan '24 – Jan '25. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

UKOM

Ipsos

Both Discord and Twitch skew heavily male; Discord has high engagement from an LGB+ audience

Among internet users aged 15-24

Share of total time spent - men

74%
Discord

65%
Twitch

vs 49% for men on an average site or app

Share of total time spent - LGB+ users

52%
Discord

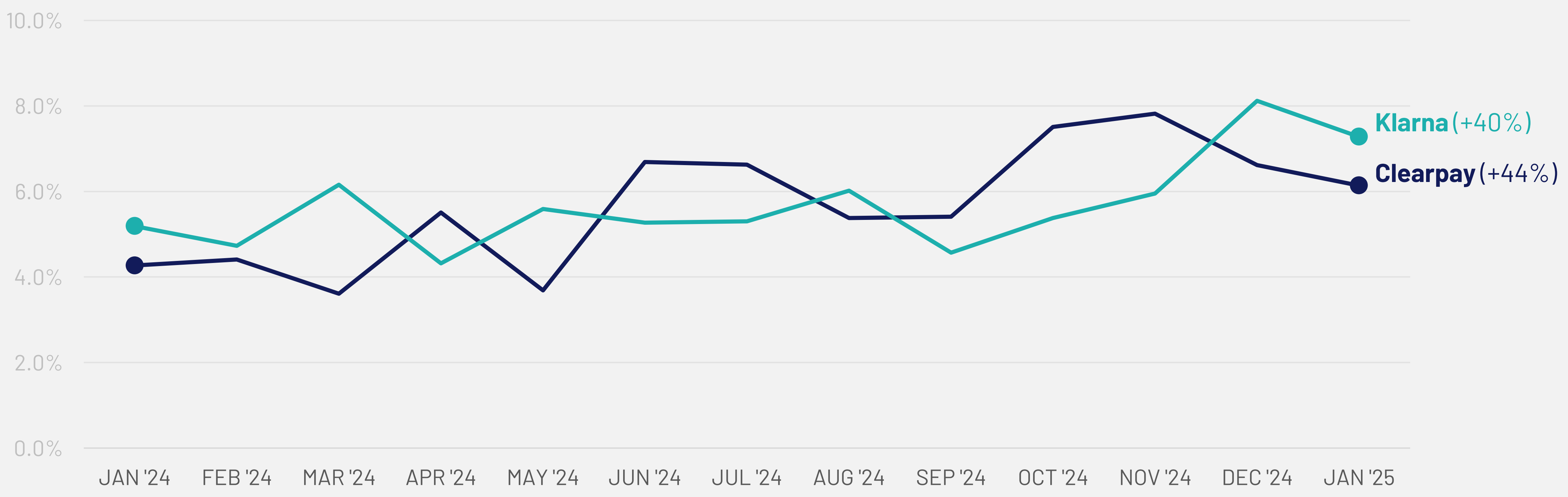
29%
Twitch

vs 29% for LGB+ on an average site or app

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Shopping habits are shifting: It's not just retailers being disrupted, but payment providers too

Buy Now, Pay Later brands: Monthly audience reach

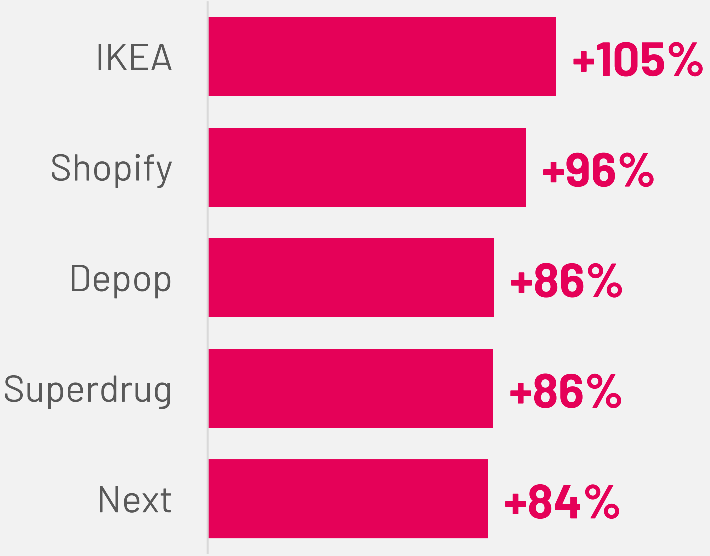


Source: Ipsos iris Online Audience Measurement Service, Jan '24 – Jan '25. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

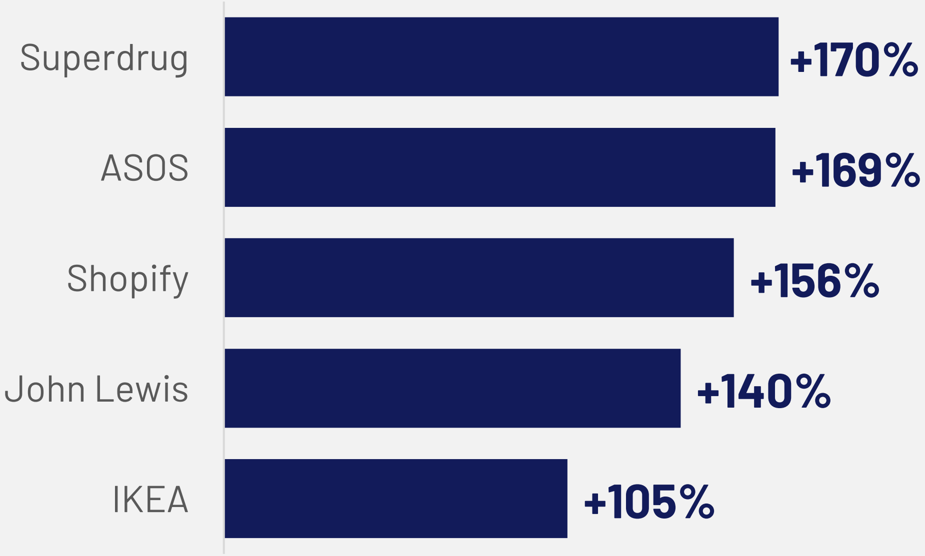
Buy Now, Pay Later users particularly favour fashion, home and cosmetic retailers

Among internet users aged 15-24

Likelihood of Klarna users to also visit



Likelihood of Clearpay users to also visit



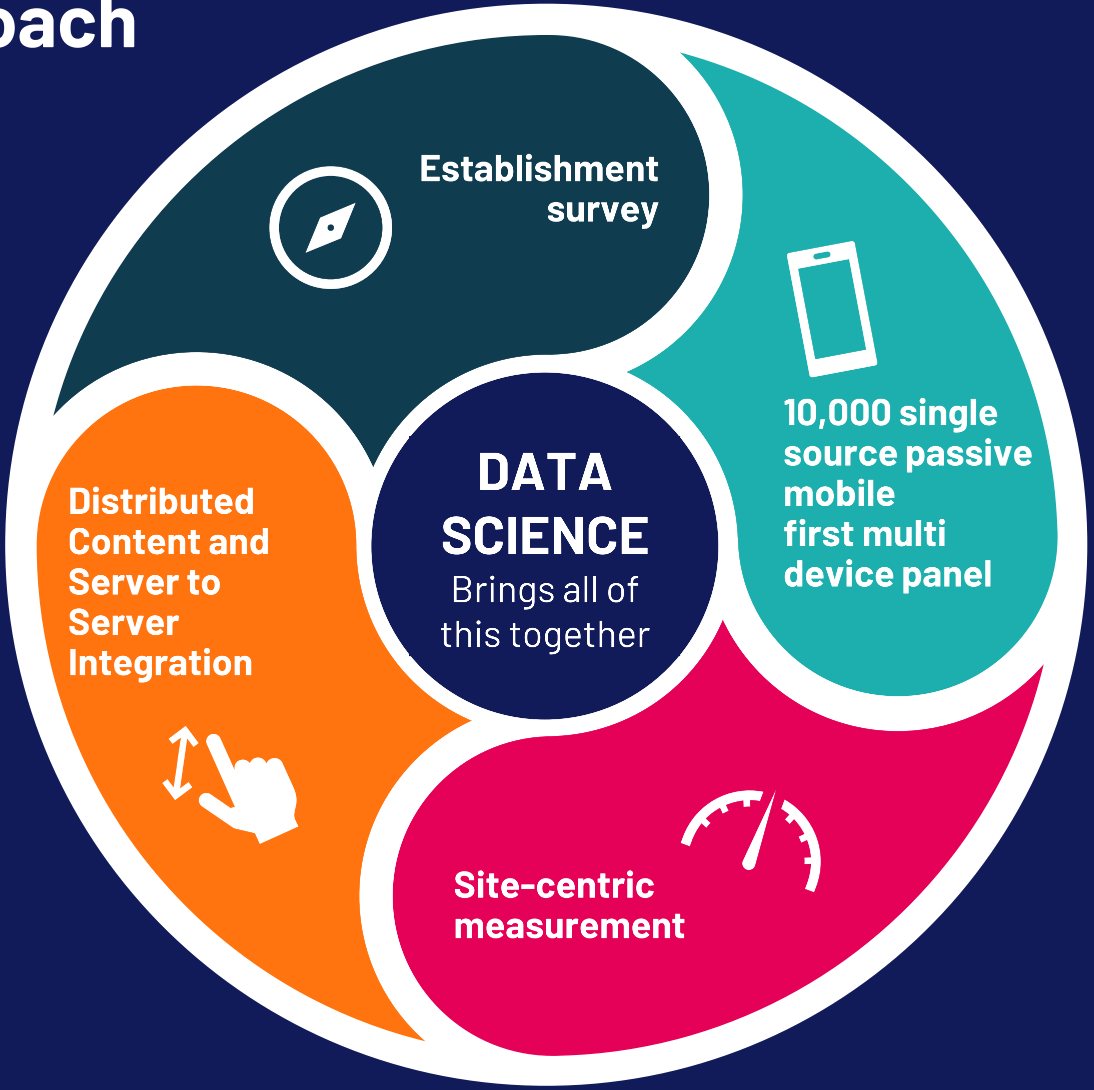
Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Takeaways

1	**Young people go deep, but not as broad** Young people may spend the longest time online, but their ecosystem of online brands is one of the smallest – they use fewer brands and apps than the average internet user. What habit-forming content do you have to become part of their world? What partnerships can you leverage to get their attention?
2	**Get your social plans in order** Young people spend almost two thirds of their time online on social media, but which specific platforms does your audience favour? Where is the best place to amplify your content? Understanding the strengths of each platform is important, as is monitoring how these strengths are influenced by tastes, technology and tribalism over the next 12 months
3	**Choose your channel** Young people are big cultural consumers, giving an array of media channels major reach. But you can also be very targeted by tapping into the top mobile game for young women, or the top entertainment news sites for young men. Which channels will help you reach your users?
4	**Fashion moves fast** Young people are using younger retail brands: market entrants from outside the UK who have used low prices to successfully disrupt the market. What can you learn from how these brands are disrupting markets?
5	**A disruptive generation** Young people are at the forefront of a range of trends: different ways to shop, different ways to connect, and different ways to navigate the digital world. Do you know how these shifting behaviours will affect your users? How will their growing use of AI impact your brand?

ABOUT IPSOS IRIS

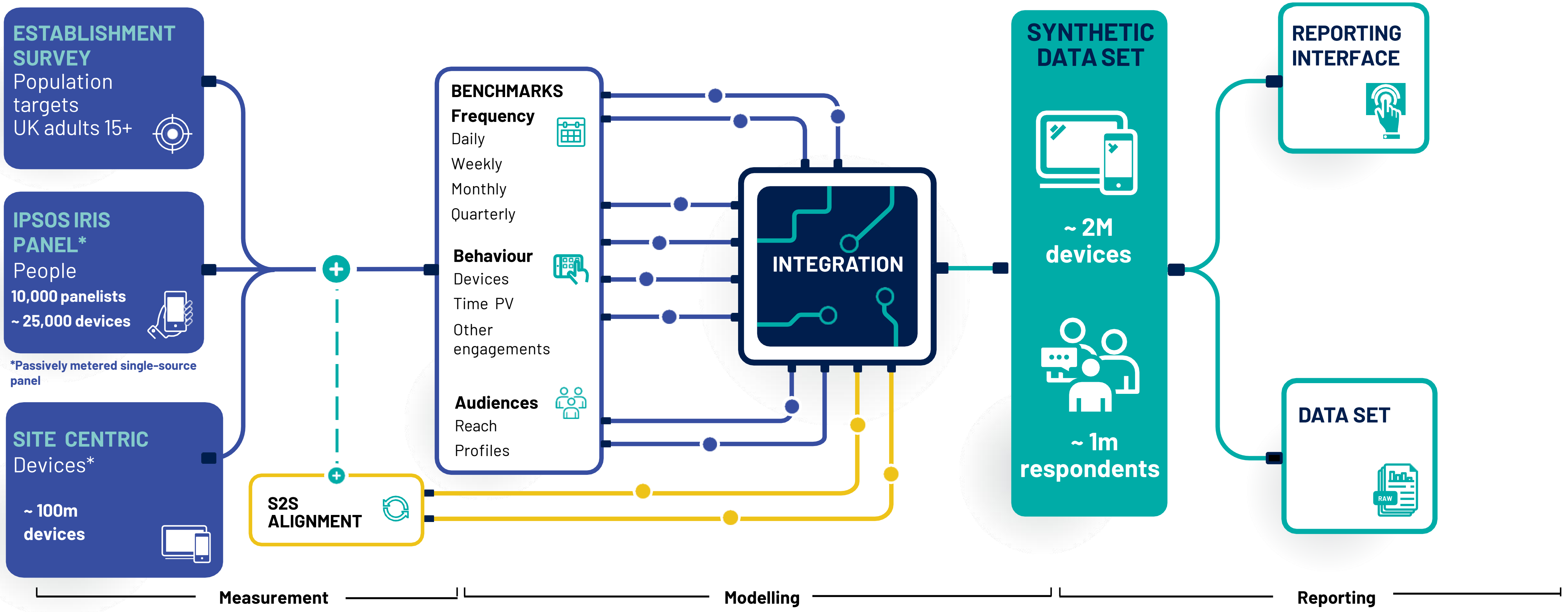
Key pillars of approach



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.



More detail on the methodology, including an interactive version of this slide can be find at: https://ukom.uk.net/ipsos-iris-overview.php

Ipsos iris provides you with these key metrics

Desktop / laptop, smartphone and tablets

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

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

Text and video

Demographic, geographic, and attitudinal audiences

Daily data
(36hrs after)

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

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

Rich profiling and targeting capabilities

Age	Disabilities	HH size
Gender	Children	Main shopper status
Sexual orientation	Parent / guardian / grandparent	Geodemographics
Social grade	Ethnicity	Nation / Region (ITV / GOR)
Chief income earner	Income	Lifestyle statements
CIE working status	Cities & towns	Marital status

Attitudes underpin behaviour

1.	You should seize opportunities in life when they arise	18.	I spend a lot of money on toiletries and cosmetics for personal use
2.	I find it difficult to balance work, children and social life	19.	I really look after my health
3.	I often do things on the spur of the moment	20.	I wear designer clothes
4.	I have a keen sense of adventure	21.	I like to keep up with the latest fashions
5.	I want to get to the very top in my career	22.	I try to keep up with developments in technology
6.	I make a conscious effort to recycle	23.	I change the decorations at home as often as I can
7.	I would be willing to volunteer my time for a good cause	24.	I am passionate about travelling
8.	I take great pleasure in looking after my appearance	25.	With a credit card I can buy the sort of things I couldn't normally afford
9.	I prefer to be active in my leisure time	26.	I look for profitable ways to invest my money
10.	Money is the best measure of success	27.	I like different people, cultures, ideas and lifestyles around me
11.	I like to go to trendy places to eat and drink	28.	I am increasingly aware of the price of goods and services
12.	It's worth paying extra for quality goods	29.	I like to enjoy life and don't worry about the future
13.	I am prepared to pay more for products that make life easier	30.	I am interested in any technology that saves me time
14.	I buy new products before most of my friends	31.	I find it hard to find time to relax
15.	I only buy products from a company whose ethics I agree with	32.	Online TV streaming services have changed the way I watch television
16.	Celebrities influence my purchase decisions	33.	I'm prepared to make lifestyle compromises to benefit the environment
17.	I would be prepared to pay more for environmentally friendly products	34.	I make more purchases online than I do in store

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.

APPENDIX: TABLES & METHODOLOGY

Tables: Total internet users

Internet users by age band

Age band	Total	Women	Men
15-24	7,653,318	3,728,962	3,924,356
25-34	8,600,544	4,369,258	4,231,286
35-44	8,575,716	4,398,462	4,177,254
45-54	8,124,236	4,142,426	3,981,810
55-64	8,091,915	4,112,705	3,979,210
65+	9,113,455	4,676,786	4,436,669

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slide 13

Change in users aged 15-24: Jan '25 vs Jan '24

Social media brand	JAN '24	JAN '25	Change (%)
Reddit	4,392,019	5,827,460	+33%
Pinterest	2,833,356	3,075,613	+9%
TikTok	5,572,432	6,008,329	+8%
X	3,990,514	4,178,971	+5%
Instagram	6,442,897	6,700,686	+4%
Facebook	6,500,842	6,742,614	+4%
YouTube	7,215,658	7,397,653	+3%
Snapchat	5,364,040	5,450,449	+2%
LinkedIn	3,229,877	3,053,111	-5%
BeReal	1,746,141	1,222,073	-30%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slides 17 and 18

Reach of apps among internet users

	Total	15-24s	15-24s vs total internet pop.
Netflix	32%	41%	28%
Amazon Prime Video	16%	18%	9%
Disney+	13%	20%	53%
BBC iPlayer	21%	15%	-28%
ITVX	10%	8%	-15%
Apple TV	8%	7%	-14%
Channel 4	6%	3%	-47%
NOW	3%	2%	-32%

Average monthly minutes spent per app user per month

	Total	15-24s	15-24s vs total internet pop.
Netflix	246.45	311.17	26%
Amazon Prime Video	118.82	143.97	21%
Disney+	198.00	353.27	78%
BBC iPlayer	208.97	149.32	-29%
ITVX	144.83	118.80	-18%
Apple TV	16.27	11.20	-31%
Channel 4	124.32	52.58	-58%
NOW	57.88	213.15	268%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slide 18

Category definitions

Media	Definitions
News	Covers all news websites and apps, including distributed content on Apple News
Audio & Radio	Covers radio (both live and listen-on-demand), music, and podcast websites and apps. Time spent metrics are not covered in this deck as Ipsos iris only captures foreground listening.
TV	Covers all online TV websites and apps (across AVOD, BVOD, SVOD, TVOD, Live TV) except for Video Sharing Platforms (VSPs) like YouTube and TikTok. For the purposes of this deck, VSPs are covered in social media. Data does not cover CTV viewing.
Mobile Gaming	Specifically covers mobile gaming apps

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slide 22

Reach of music apps among internet users

	Total internet pop.	15-24s	15-24s vs total internet pop.
Spotify	44%	68%	+54%
Apple Music	52%	57%	+10%
SoundCloud	4%	8%	+119%
YouTube Music	6%	6%	-5%
Amazon Music	11%	5%	-55%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slide 28

Online reach for retail categories among internet users

Retail category	Total internet pop.	15-24s	15-24s vs Total
Fast Food & Delivery	52%	65%	+25%
Movies/Cinema	20%	23%	+14%
Computer Hardware	10%	11%	+13%
Games & Toys	22%	24%	+12%
Photos	13%	14%	+9%
Ticketing	53%	56%	+6%
Fashion, Style & Beauty	73%	74%	+2%
Restaurants/Pubs	44%	43%	-2%
General Retail & Commerce	93%	90%	-3%
Computer Software	20%	20%	-3%
Vouchers/Rewards	76%	71%	-7%
Consumer Electronics	72%	67%	-7%
Health	48%	42%	-12%
Books & Literature	35%	30%	-12%
Snacks & Confectionary	8%	7%	-18%

Retail category	Total internet pop.	15-24s	15-24s vs Total
Auctions	65%	52%	-19%
Flower Shopping	5%	4%	-21%
Grocery/Supermarket Shopping	77%	61%	-21%
Other Retail & Commerce	46%	36%	-22%
Stationery/Arts/Craft	16%	12%	-23%
Beverages	11%	8%	-25%
Retail & Commerce news	2%	2%	-27%
Comparison sites	57%	38%	-33%
Loyalty points	39%	26%	-34%
Homes & Garden	57%	36%	-36%
Automotive	16%	10%	-37%
Greeting Cards	10%	6%	-40%
Outdoor/Leisure	12%	7%	-44%
Pets	11%	4%	-64%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

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Tables: Slide 32

Profile of fashion brands: 15-24s vs all internet users

	Total audience				Audience composition			
	15-24 internet users	Temu	Shein	AliExpress	15-24 internet users	Temu	Shein	AliExpress
Female	3,728,962	1,713,864	1,708,565	1,114,373	49%	53%	71%	54%
Lesbian, Gay, Bisexual or Identify another way	1,976,417	768,250	480,638	519,596	26%	24%	20%	25%
Net agree: Celebrities influence my purchase decisions	814,948	334,398	348,628	259,080	11%	10%	14%	12%
Net agree: I would be prepared to pay more for environmentally friendly products	3,378,877	1,554,883	1,140,749	869,576	44%	48%	47%	42%
Net agree: I like to keep up with the latest fashions	1,741,479	709,220	659,477	545,274	23%	22%	27%	26%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).

Tables: Slide 39

Profile of fashion brands: 15-24s vs all internet users

	Base: 15-24 internet users		Base: 15-24 Klara users		
	Audience	Audience reach	Audience	Audience reach	Index vs 15-24 internet users
IKEA	900,693	12%	134,182	24%	+105%
Shopify	2,599,222	34%	369,996	66%	+96%
Depop	967,634	13%	130,983	24%	+86%
Superdrug	731,592	10%	98,894	18%	+86%
Next	686,536	9%	92,032	17%	+84%

	Base: 15-24 internet users		Base: 15-24 Clearpay users		
	Audience	Audience reach	Audience	Audience reach	Index vs 15-24 internet users
Superdrug	731,592	10%	121,467	26%	+170%
ASOS	1,492,613	20%	246,883	53%	+169%
Shopify	2,599,222	34%	409,566	87%	+157%
Depop	967,634	13%	120,173	26%	+102%
IKEA	900,693	12%	113,694	24%	+105%

Source: Ipsos iris Online Audience Measurement Service, January 2025. UK internet users aged 15+ using PC/laptop, smartphone or tablet device(s).