

Ipsos iris Social Media

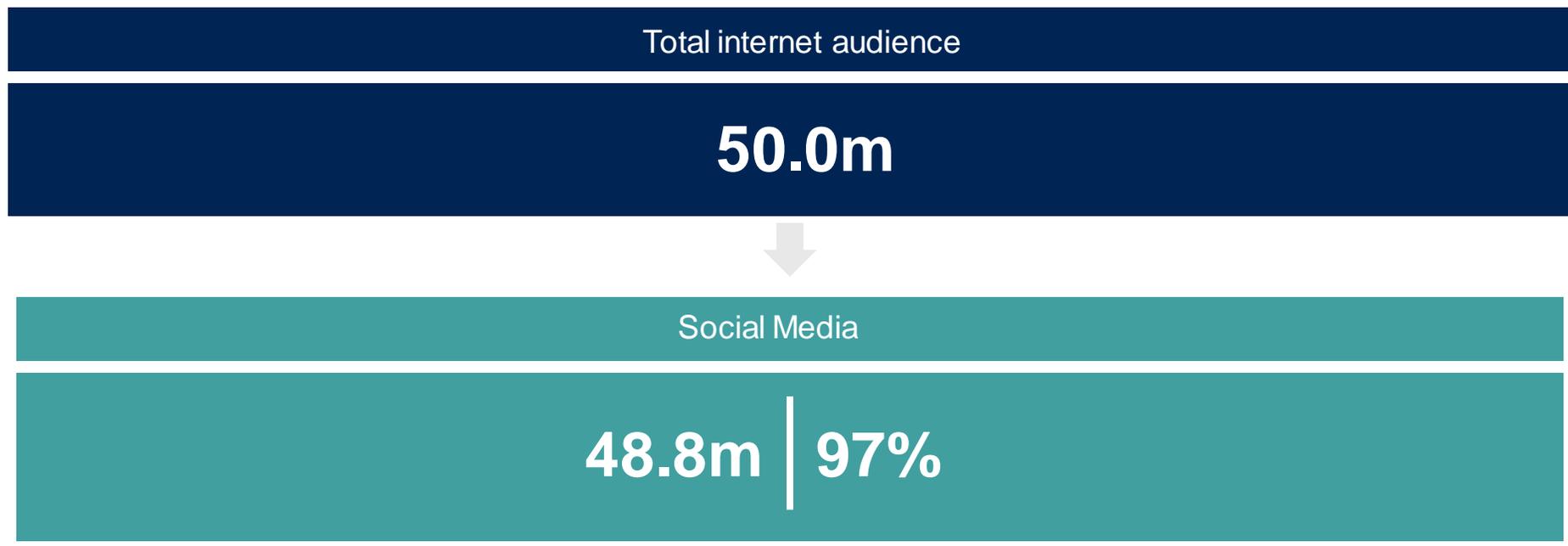
November 2023

UKOM



Almost everyone is on social media these days

97% of the online population accessed social media in September



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



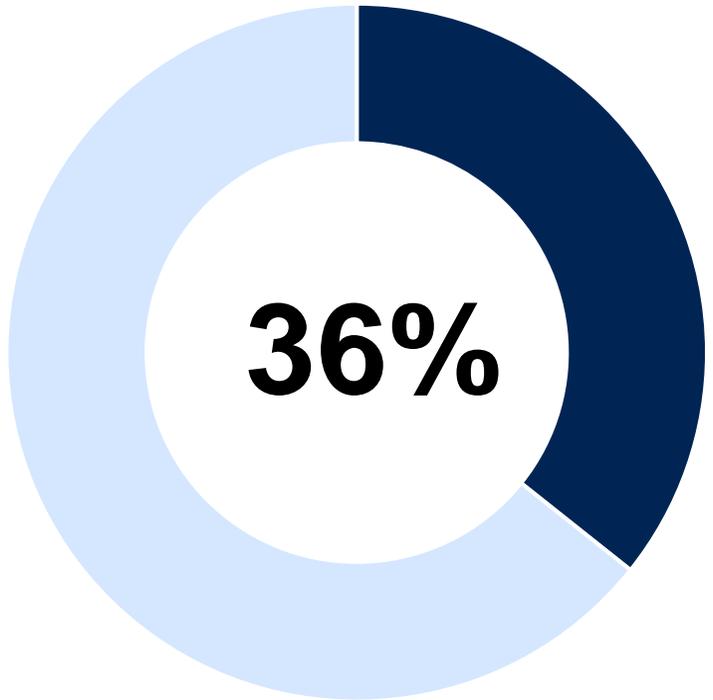
OPPORTUNITY SIZING

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



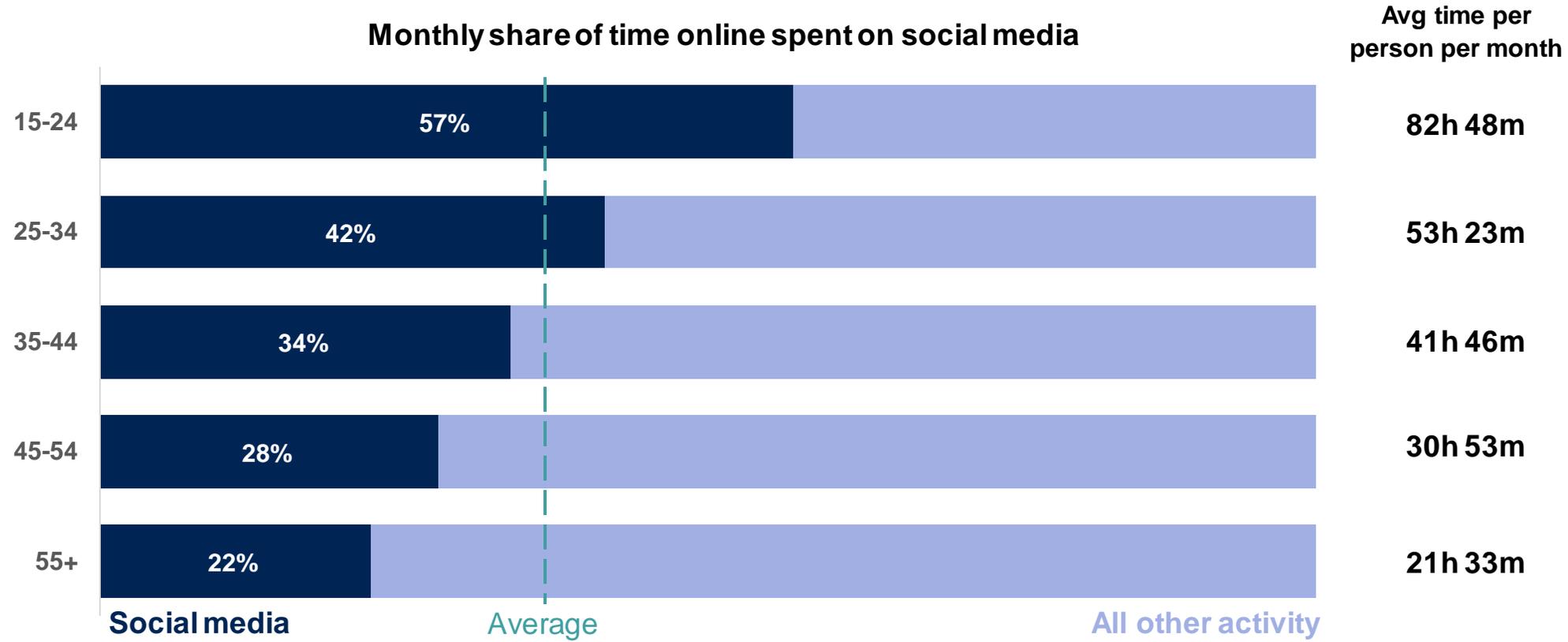
That's **1 hour and 45 minutes** a day

Share of time spent on social media



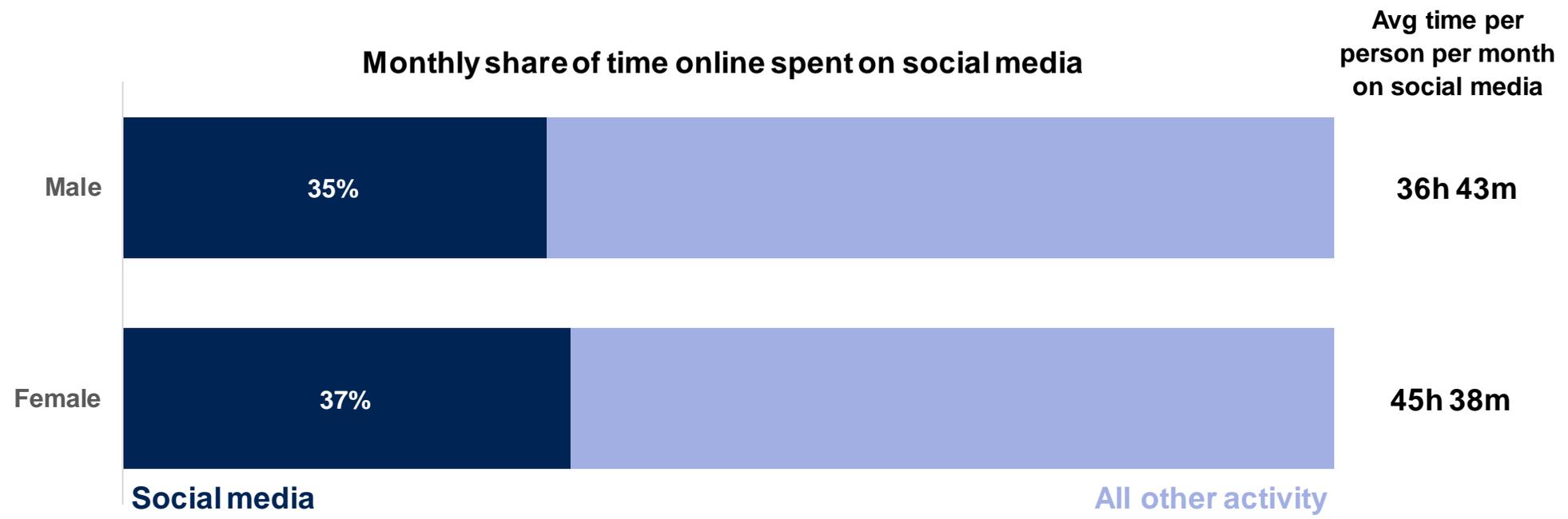
Younger audiences spend an even bigger proportion of their time on social media

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.



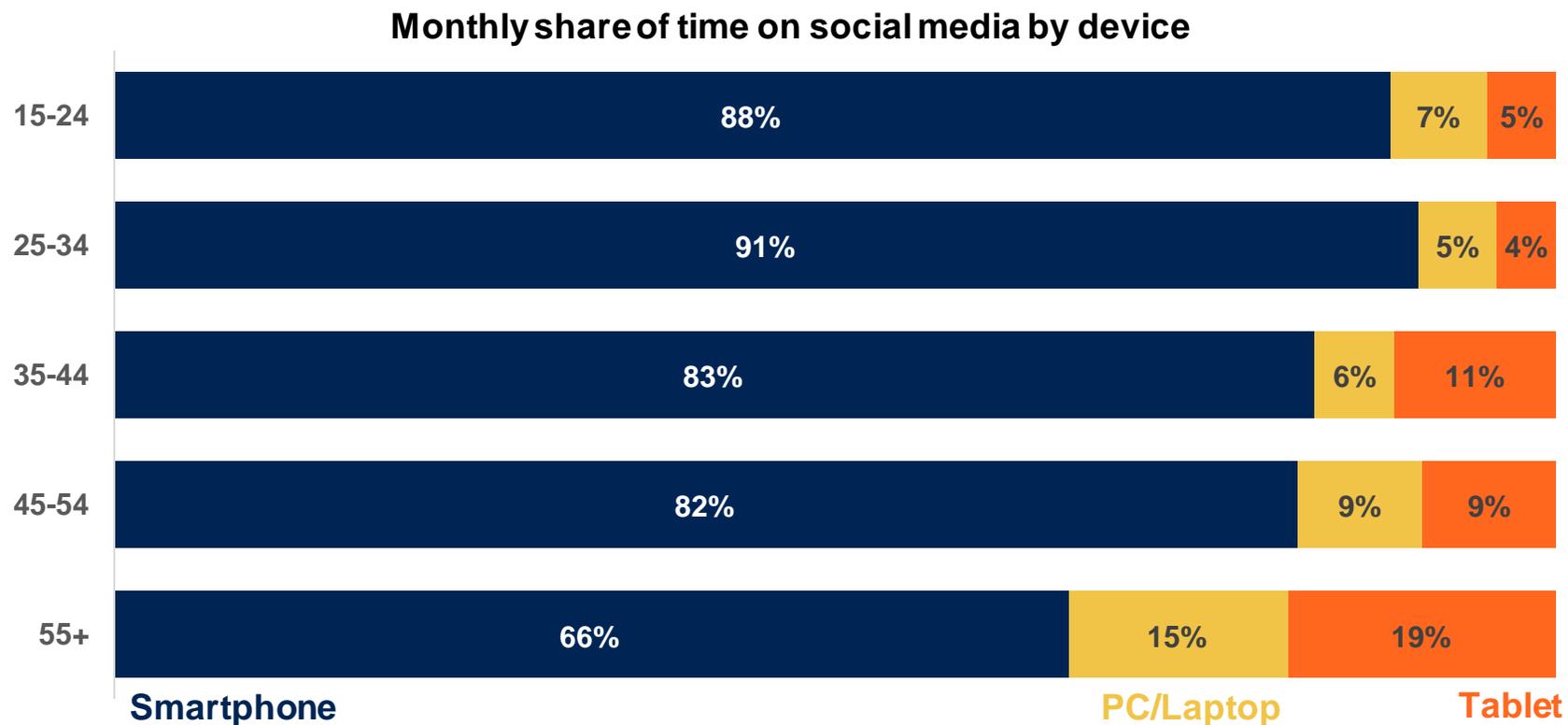
Women also spend more time on social media

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.



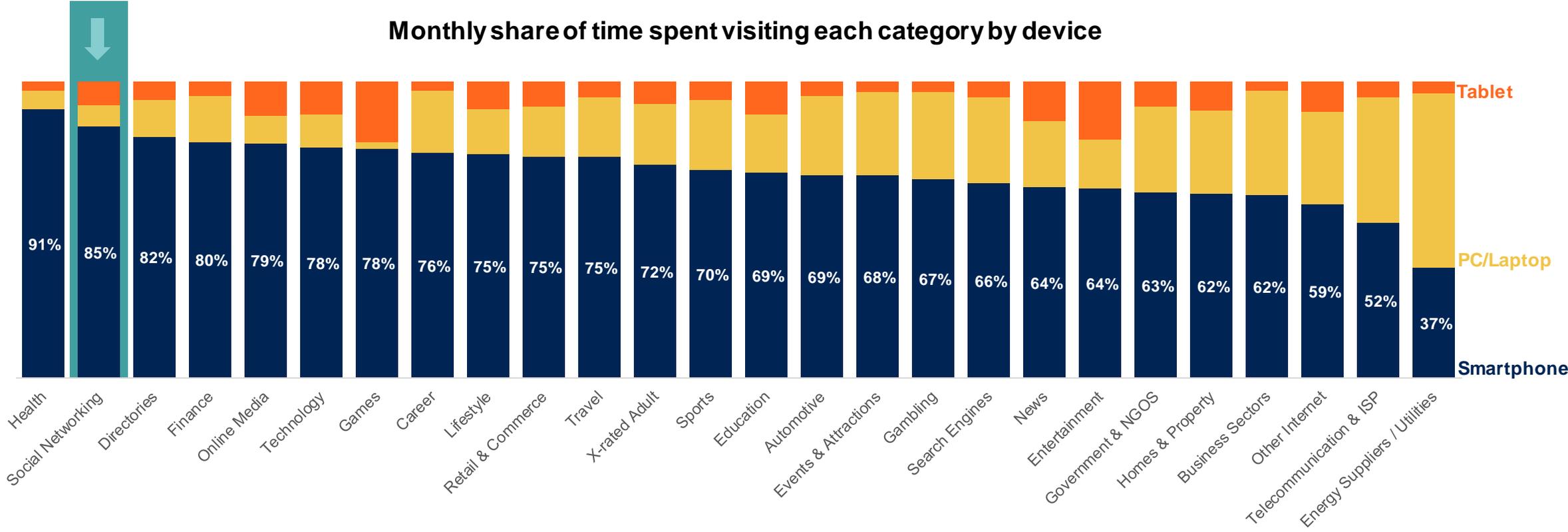
The majority of time on social media is spent on smartphones

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?



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



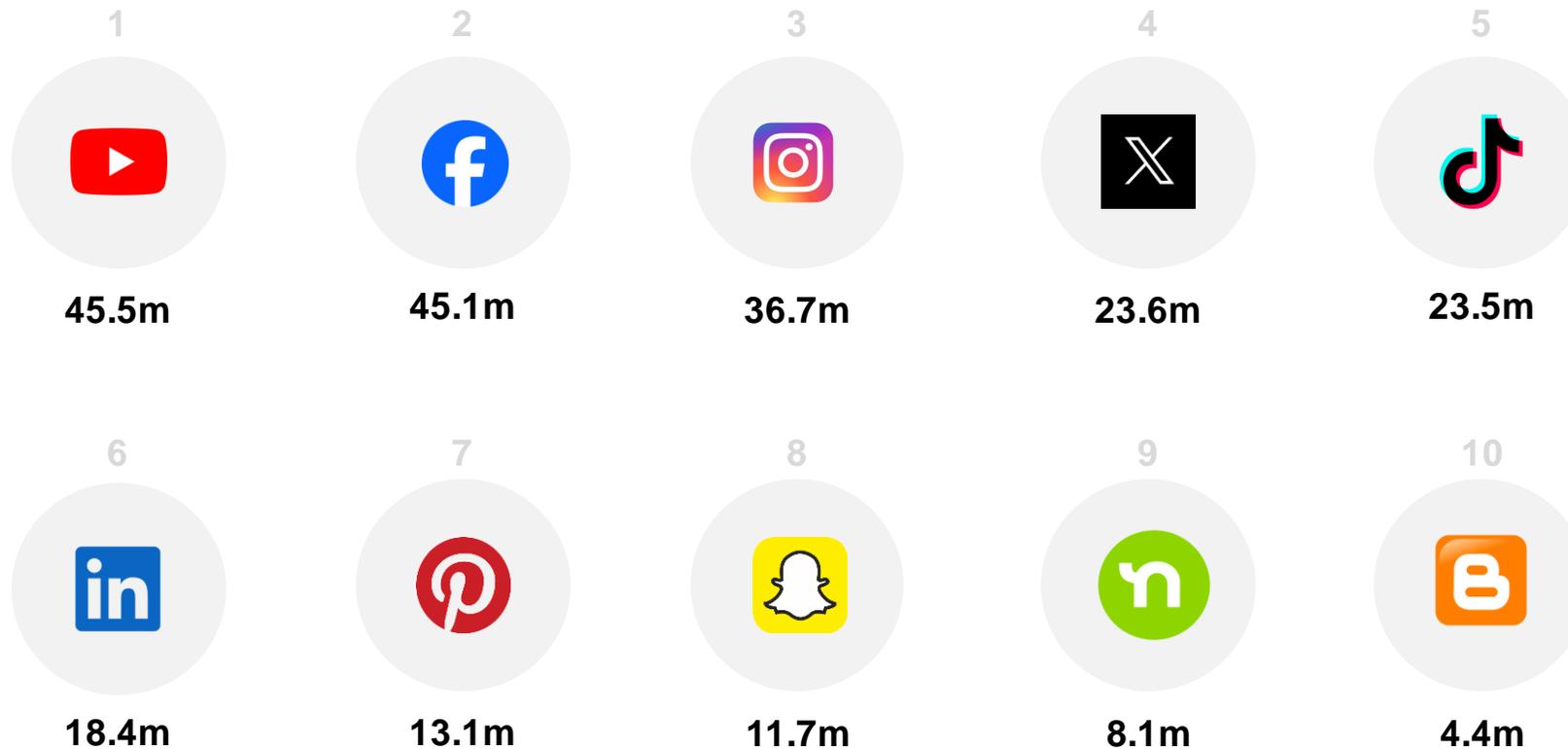
AUDIENCE PROFILE

02



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

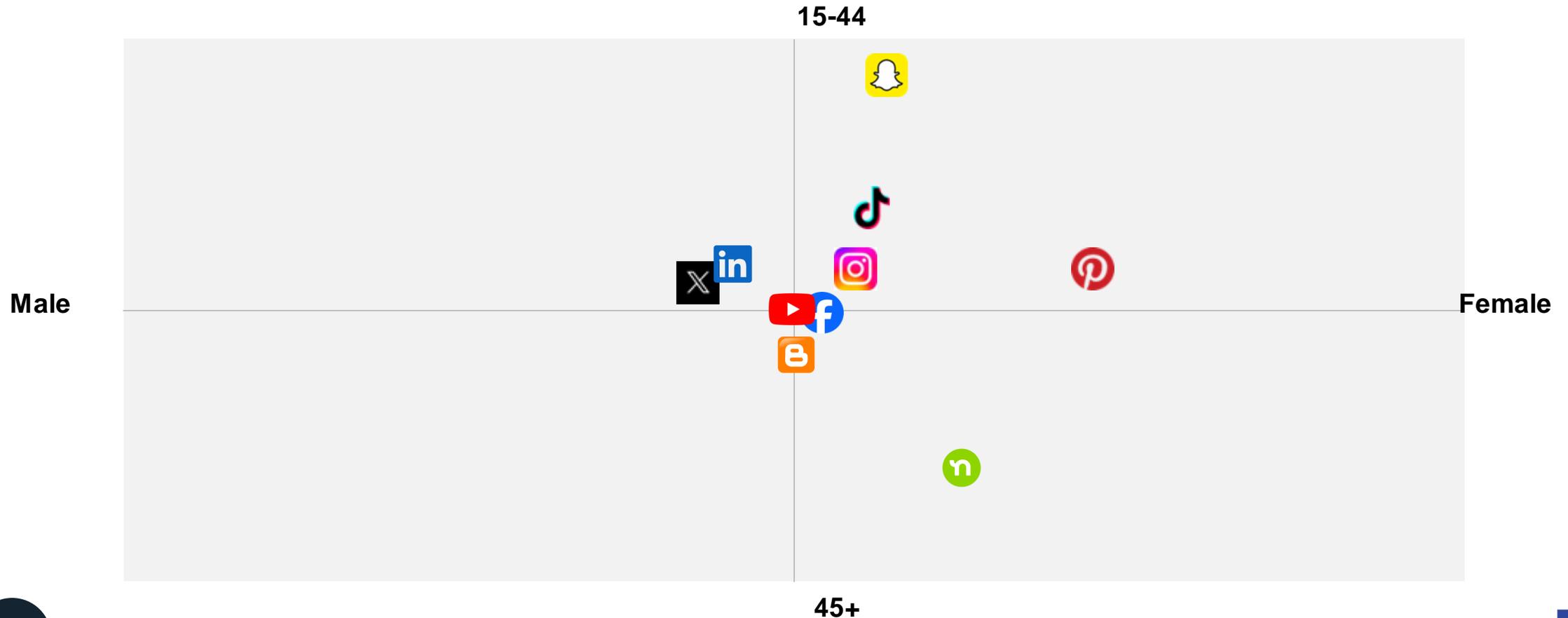
YouTube and Facebook each reach over 90% of internet users by themselves. Meanwhile, TikTok is now about the same size as X.



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.

Snapshot 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

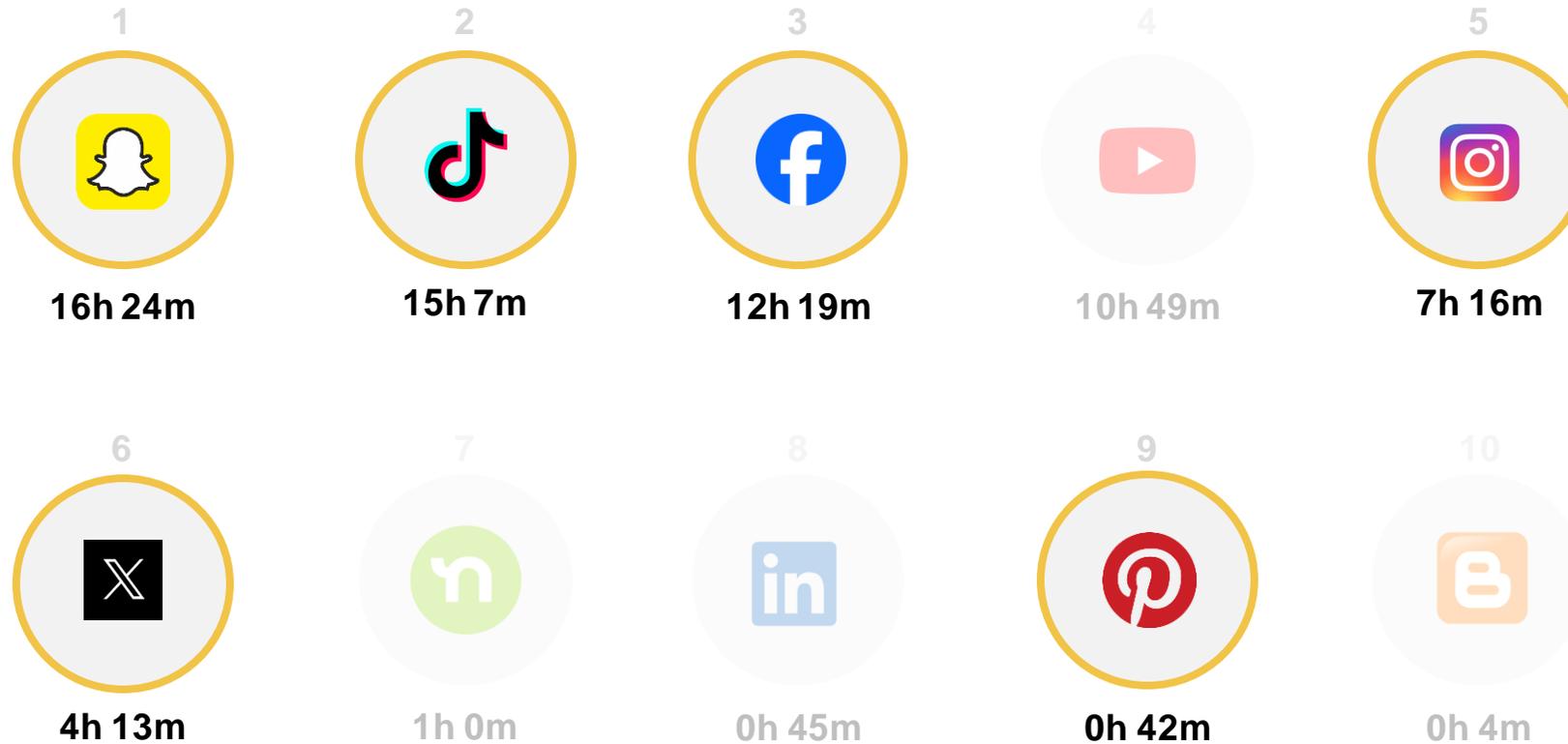
Snapchat and TikTok account for huge amounts of time, which provides a real opportunity for advertisers.



Monthly time spent on the top 10 biggest social media brands



We'll be focusing on these six brands

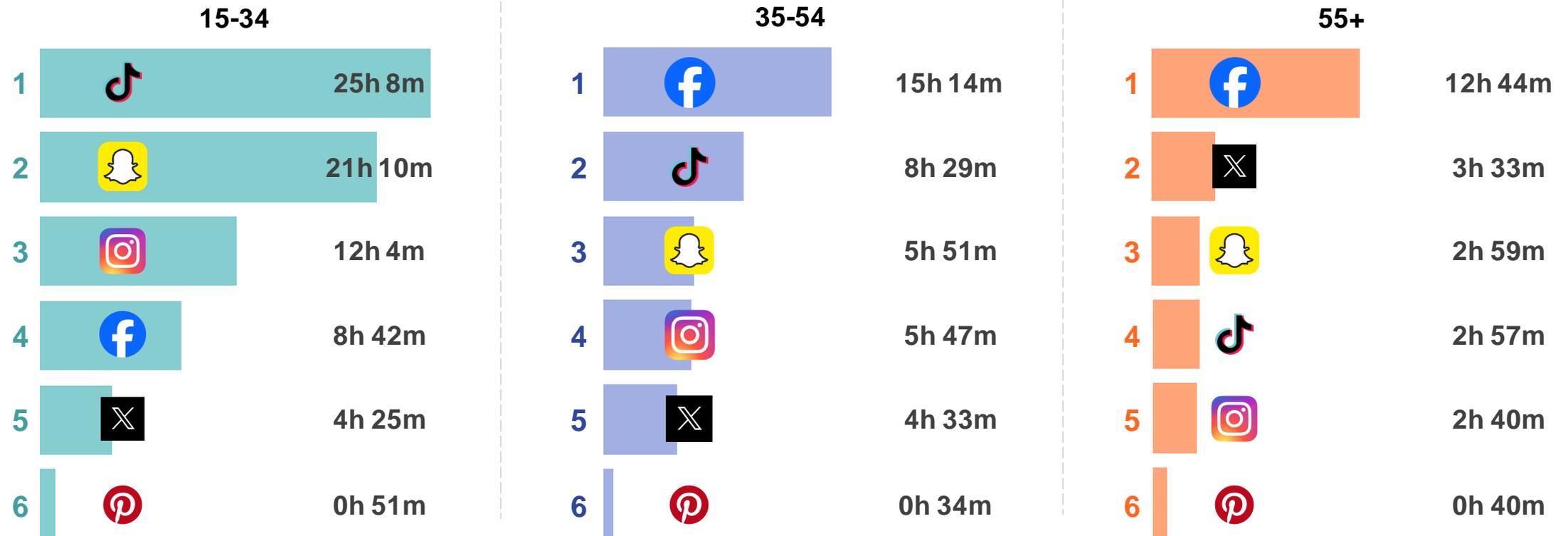


Monthly time spent on the top 10 biggest social media brands

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

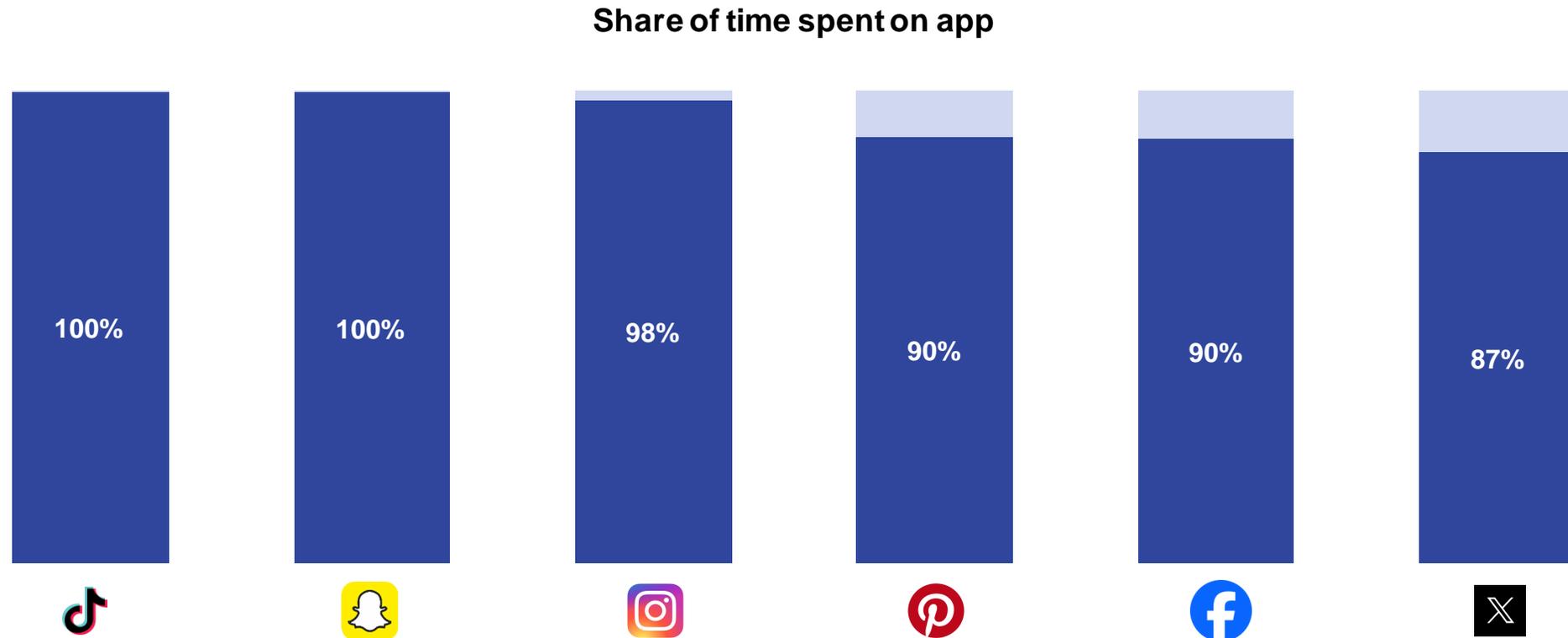
Finding the right social platform to partner with will ensure you fully capitalise on the engagement that this channel offers.

Top brands by avg. mins pp



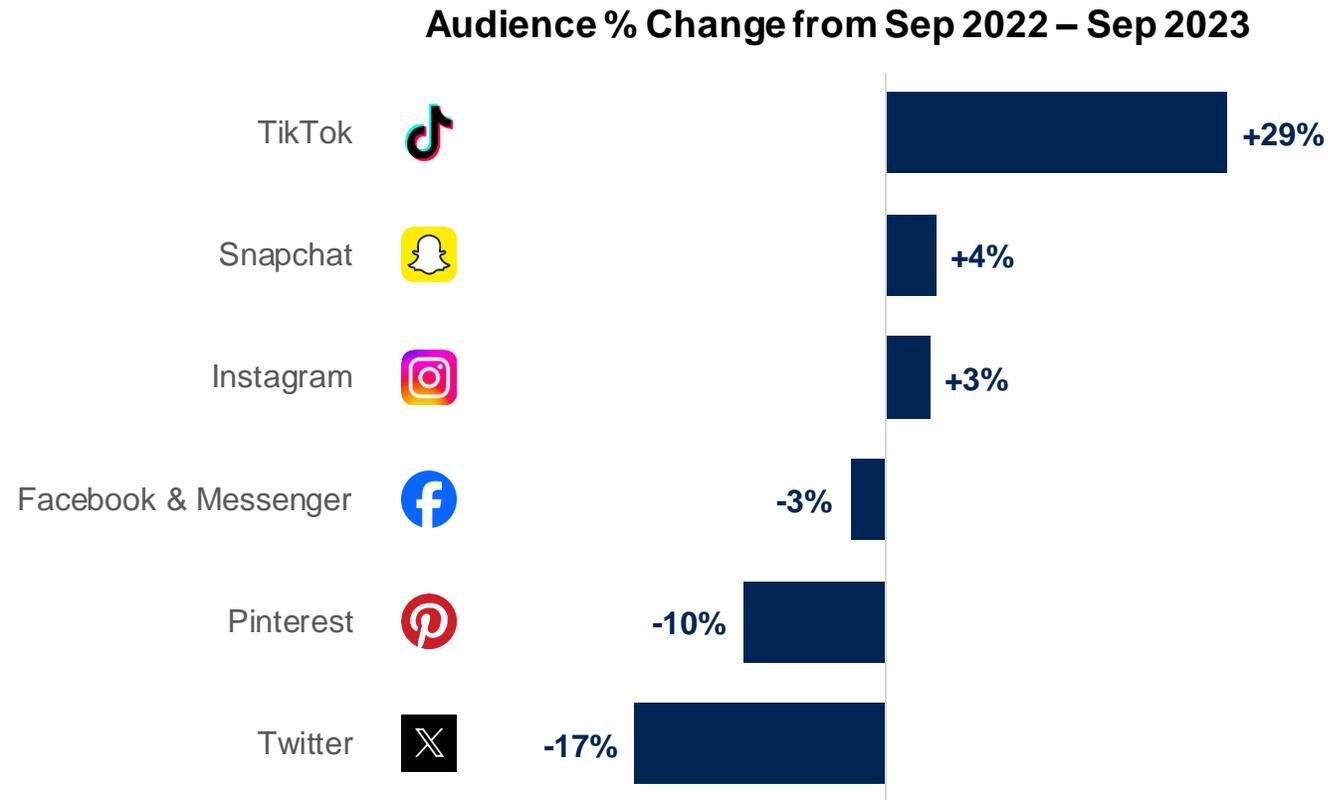
The vast majority of time spent is on app

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



TikTok has seen the greatest year on year increase in audience, while X experienced the largest audience decline

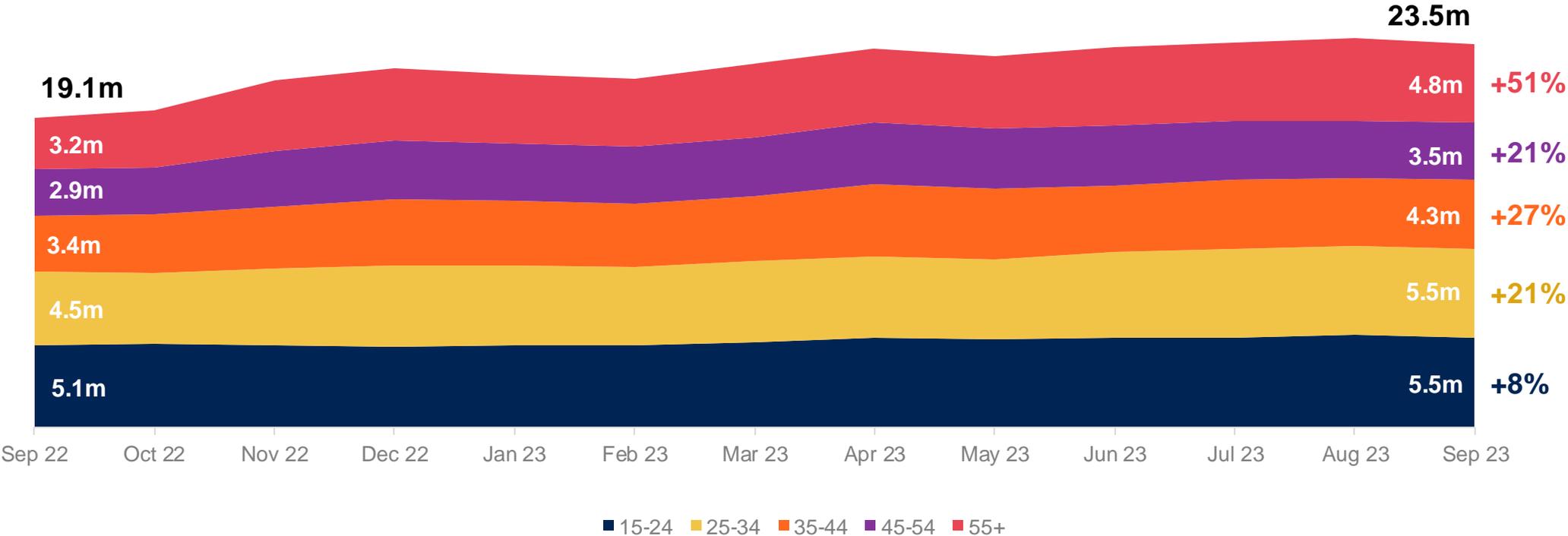
The online world is constantly changing: make sure you're meeting your audience where they are



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?

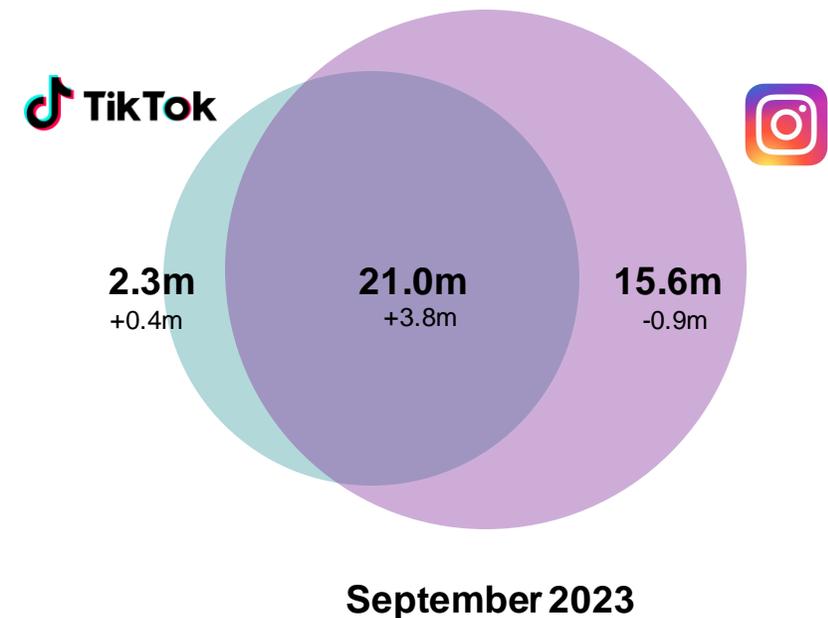
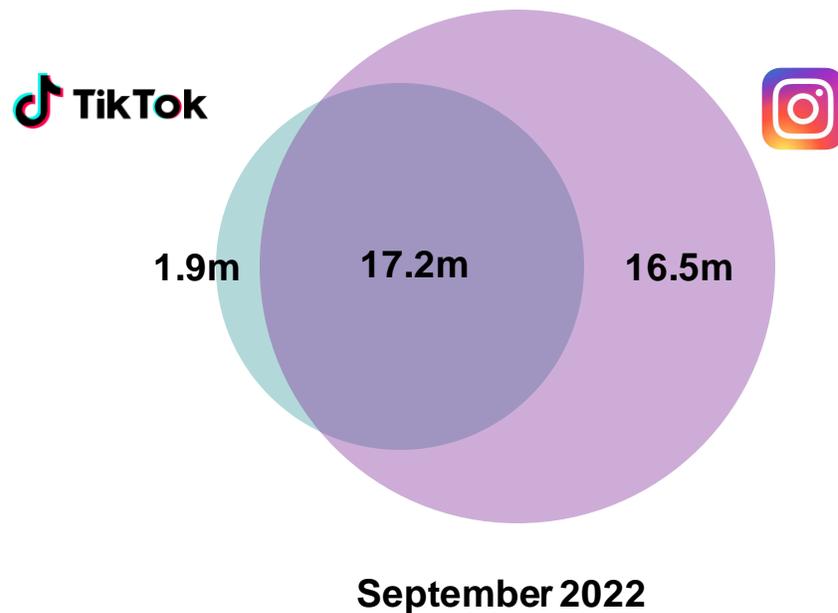
TikTok Annual Audience by Age



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?

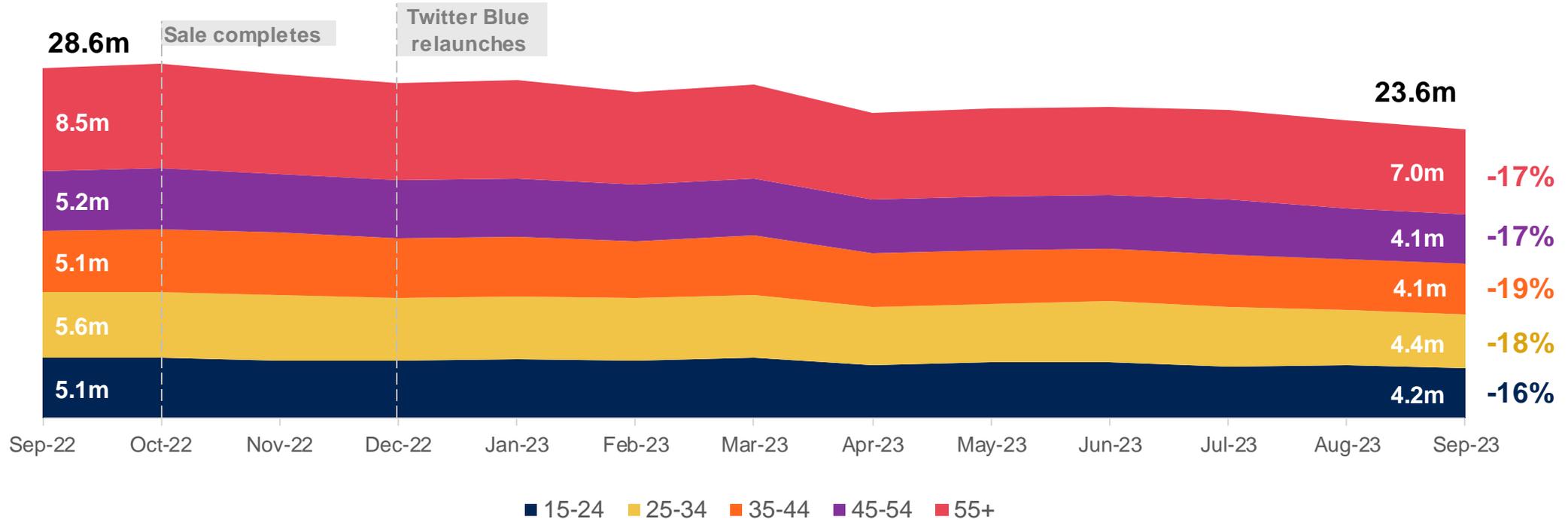
TikTok and Instagram shared audience



X's audience has declined fastest among users aged 15-24

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.

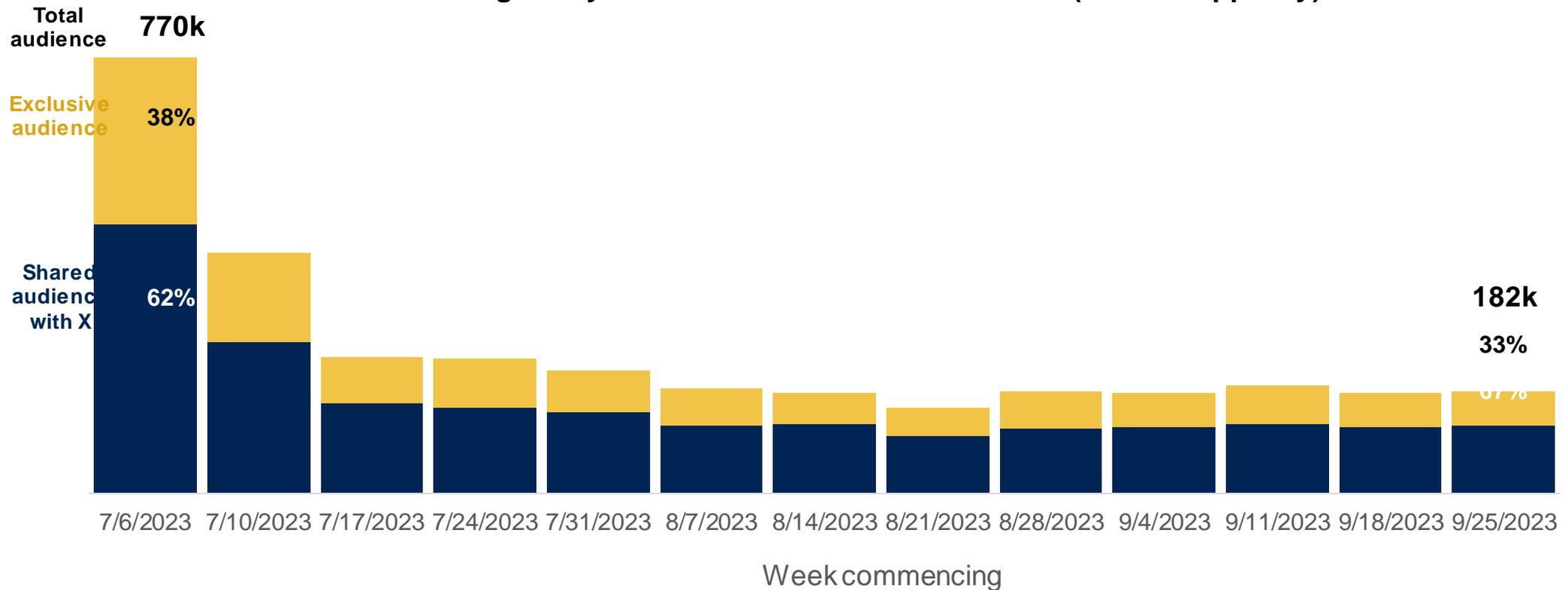
X (formerly Twitter) Annual Audience by Age



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.

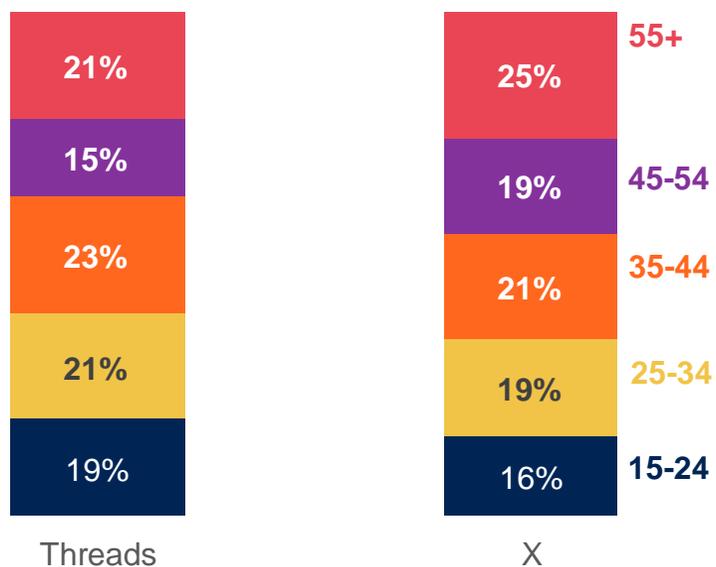
Average Daily audience for Threads since launch (Android app only)



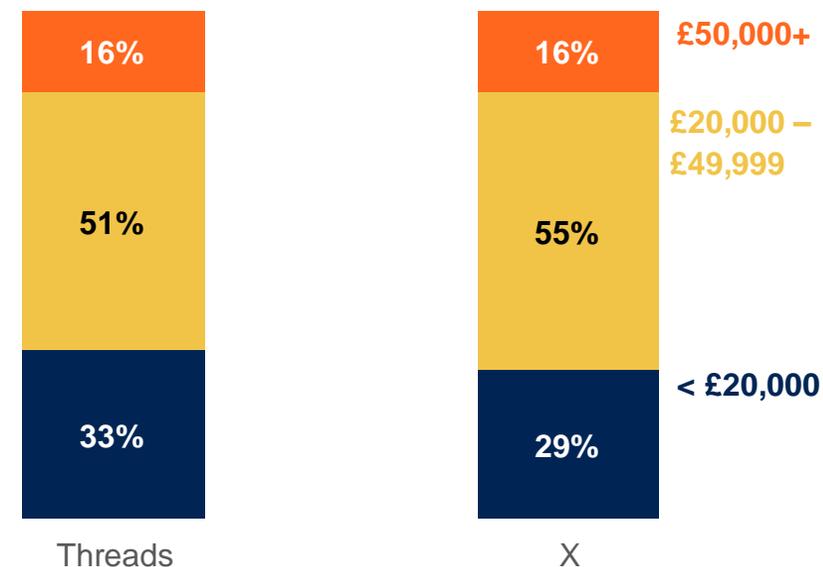
Threads users skew younger and slightly lower income than X users

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)



Income of users (Android app only)



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

 X (Twitter)

 Instagram

 Pinterest

 Snapchat

 TikTok

-6%

-1%

-1%

-13%

+6%

0%

+2%

-1%

+6%

+4%

-7%

+11%

+71%

+2%

+56%

+21%

0%

+24%

...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



1	METRO	+7%
2	THE Sun	+6%
3	DAILY Mirror	+6%
4	THE TIMES	+6%
5	Mail Online	+6%



	EveningStandard.	+28%
	The Guardian	+24%
	THE TIMES	+24%
	The Telegraph	+23%
	METRO	+23%

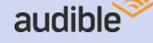


	METRO	+17%
	EveningStandard.	+16%
	DAILY Mirror	+15%
	INDEPENDENT	+14%
	THE Sun	+13%

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

						
1	 +8%	 +25%	 +29%	 +62%	 +80%	 +91%
2	 +8%	 +23%	 +27%	 +53%	 +75%	 +85%
3	 +8%	 +21%	 +27%	 +51%	 +73%	 +74%
4	 +8%	 +20%	 +25%	 +44%	 +70%	 +65%
5	 +8%	 +20%	 +25%	 +42%	 +64%	 +63%

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

Matt Patchett

Insight Lead

Matt.Patchett@ipsos.com

Tracy Allnutt

Business Development Director

Tracy.Allnutt@ipsos.com

Oliver Thomas

Marketing Lead

Oliver.Thomas@ipsos.com

APPENDIX

One-page reports



Pinterest

13.5m

Total audience

0h 45m

Avg time per user

7.6m

Web audience

7.5m

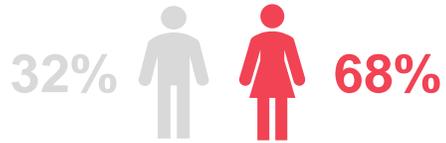
App audience



August 23

Monthly

Gender



Social Grade



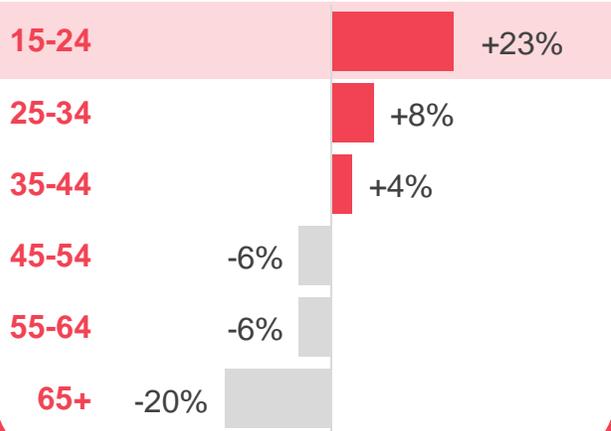
Most likely to agree vs all internet users that...

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

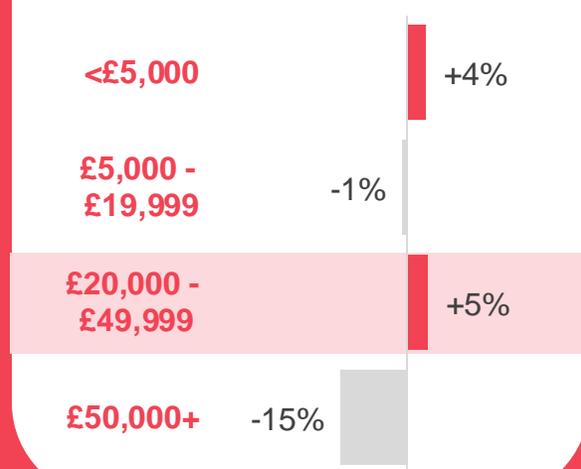
Least likely to agree vs all internet users that...

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

Age vs total internet



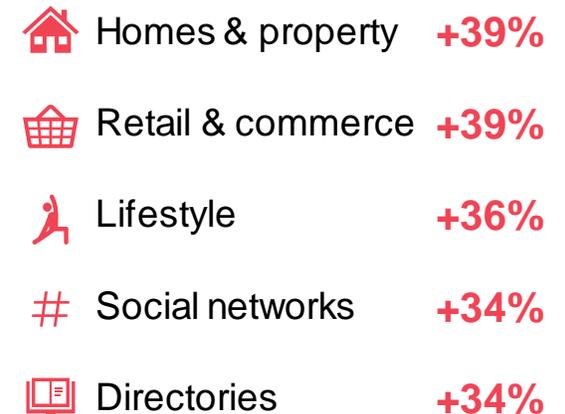
Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of



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.



37.6m

Total audience

6h 02m

Avg time per user

20.0m

Web audience

32.6m

App audience

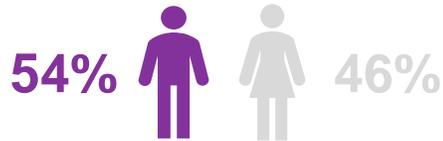
Monthly



August 23

Instagram

Gender



Social Grade



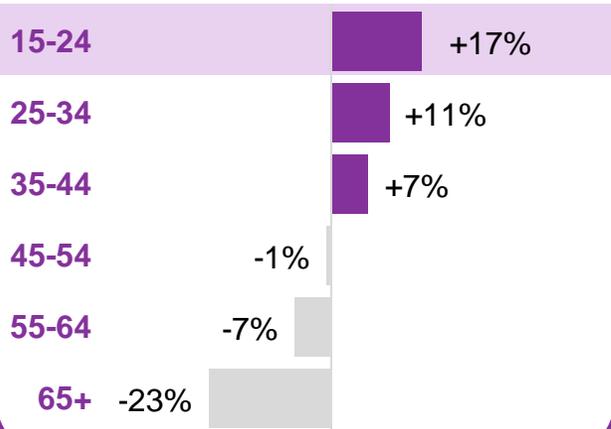
Most likely to agree vs all internet users that...

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

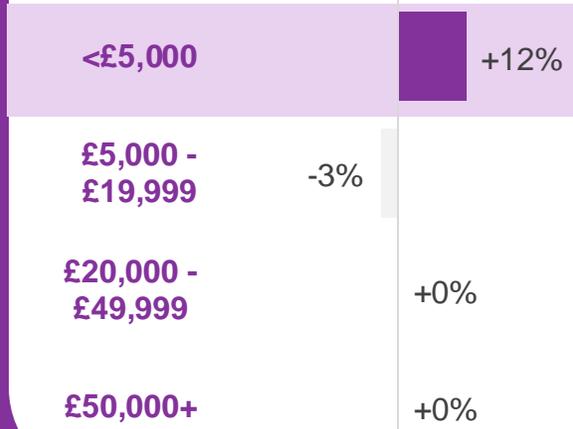
Least likely to agree vs all internet users that...

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

Age vs total internet



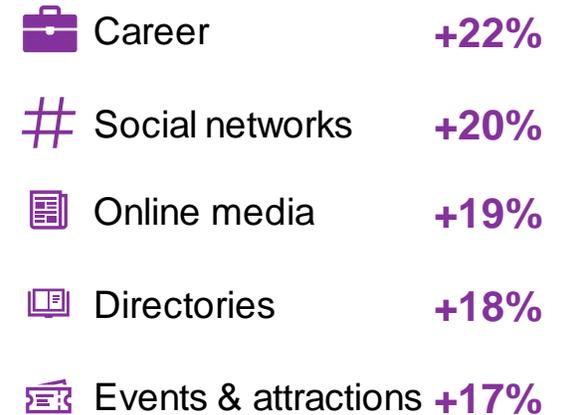
Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of



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.



Snapchat

Monthly

11.8m | 16h 23m | 3.3m | 11.6m

Total audience

Avg time per user

Web audience

App audience



August 23

Gender



Social Grade



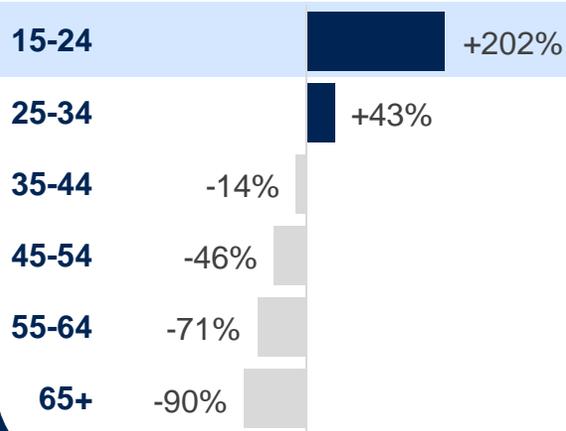
Most likely to agree vs all internet users that...

Celebrities influence my purchase decisions (+69%)

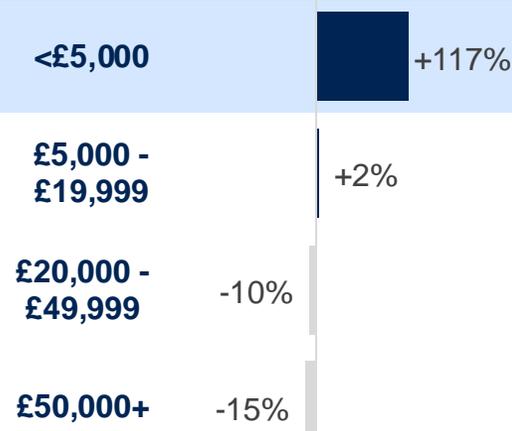
Least likely to agree vs all internet users that...

I make a conscious effort to recycle (-10%)

Age vs total internet



Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of



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.



Facebook

Monthly

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

Total audience

Avg time per user

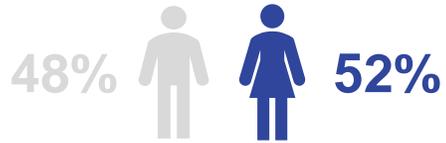
Web audience

App audience



August 23

Gender



Social Grade



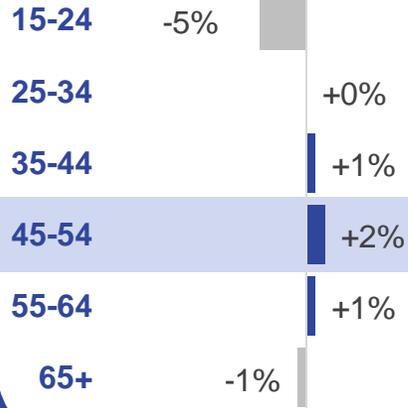
Most likely to agree vs all internet users that...

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

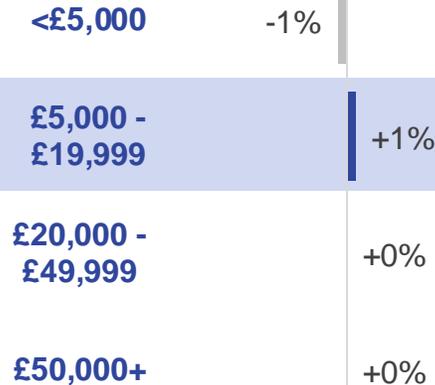
Least likely to agree vs all internet users that...

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

Age vs total internet



Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of



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.



X (Twitter)

Monthly

24.3m

Total audience

4h 38m

Avg time per user

14.5m

Web audience

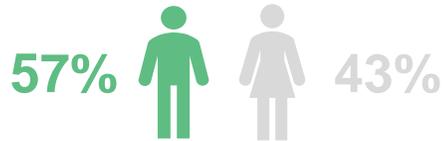
16.3m

App audience

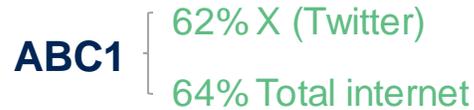


August 23

Gender



Social Grade



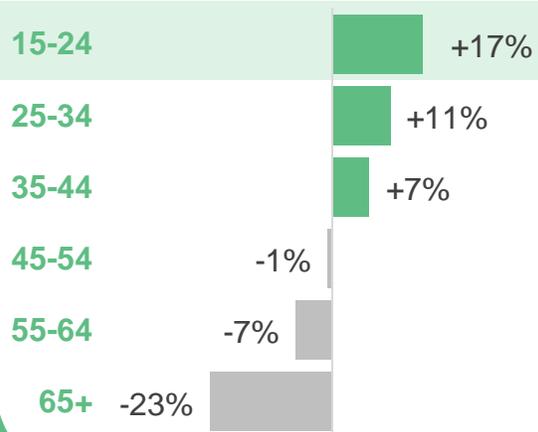
Most likely to agree vs all internet users that...

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

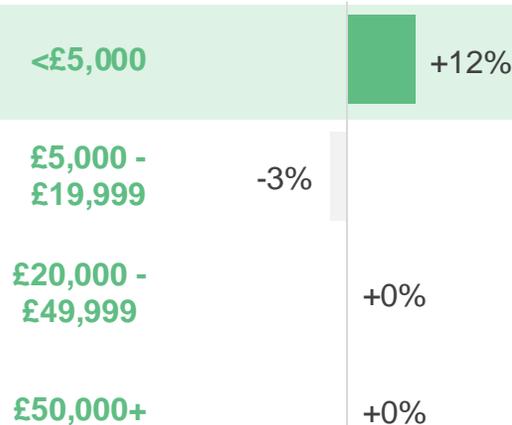
Least likely to agree vs all internet users that...

I really look after my health (-6%)

Age vs total internet



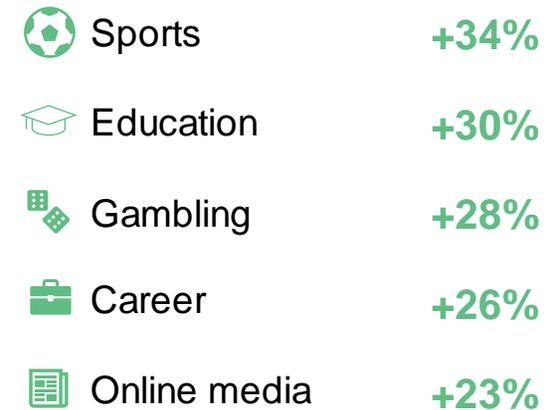
Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of



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.



TikTok

Monthly

23.9m | 14h 39m | 12.0m | 18.5m

Total audience

Avg time per user

Web audience

App audience

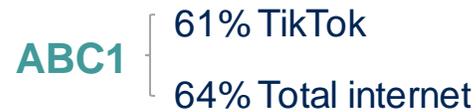


August 23

Gender



Social Grade



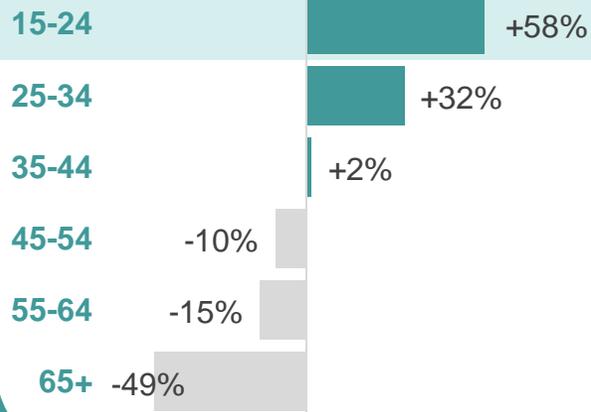
Most likely to agree vs all internet users that...

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

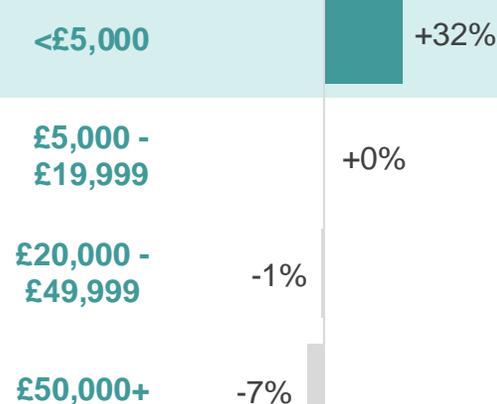
Least likely to agree vs all internet users that...

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

Age vs total internet



Income vs total internet



Highest affinity index retailers



More likely to be heavy visitors of

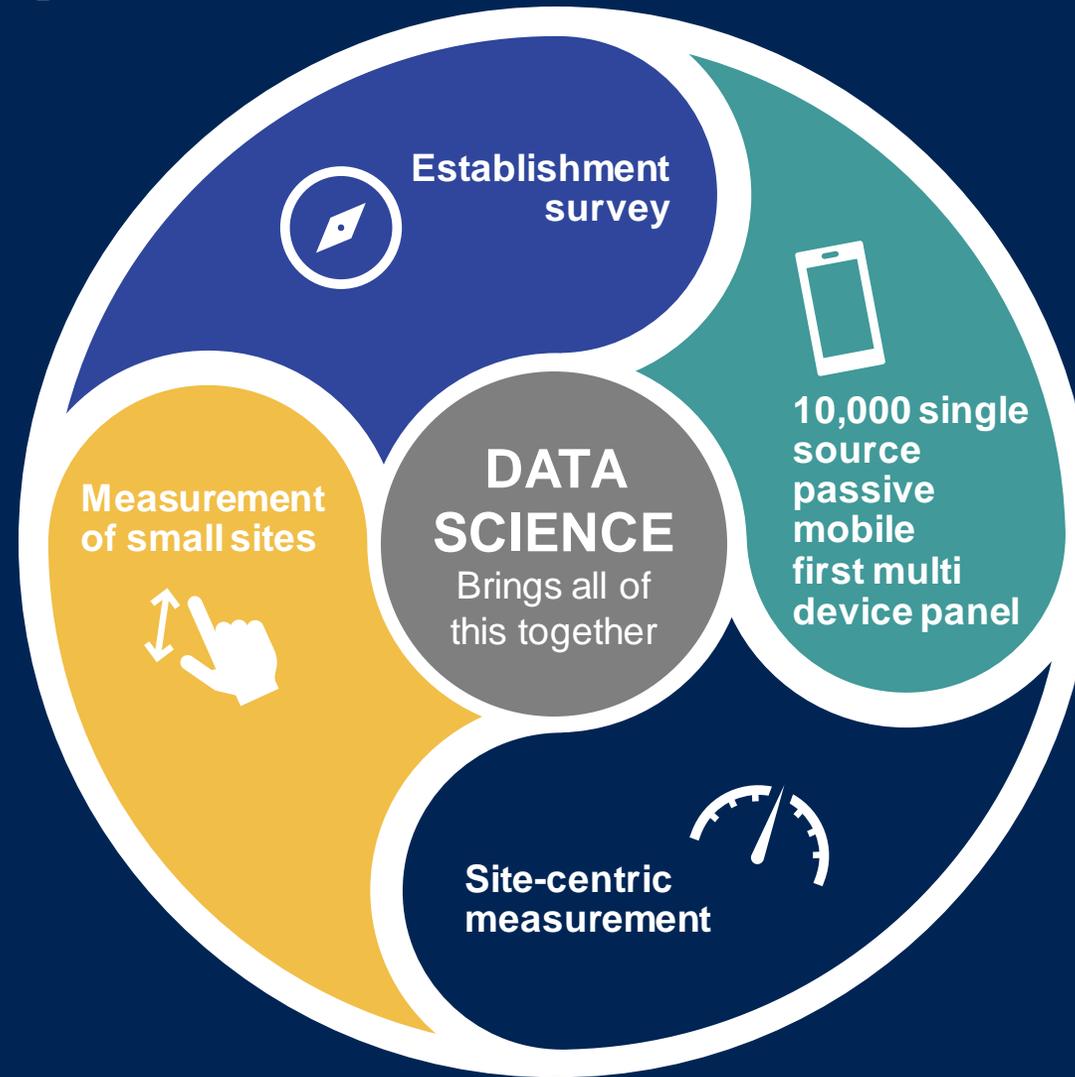


All percentage figures - other than gender and social grade - are indexed versus the total UK internet population.

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



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)

Rich profiling and targeting capabilities

Age

Gender

Sexual orientation

Social grade

Ethnicity

Income

Chief income earner

CIE working status

Marital status

Disabilities

Children

Parent / guardian / grandparent

HH size

Main shopper status

Nation

Region (ITV / GOR)

Cities & towns

Lifestyle statements

Interests

Live TV days

Live TV hours

Radio days

Radio duration

Regular paper use

Regular paper duration

Magazine use

Magazine duration



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.

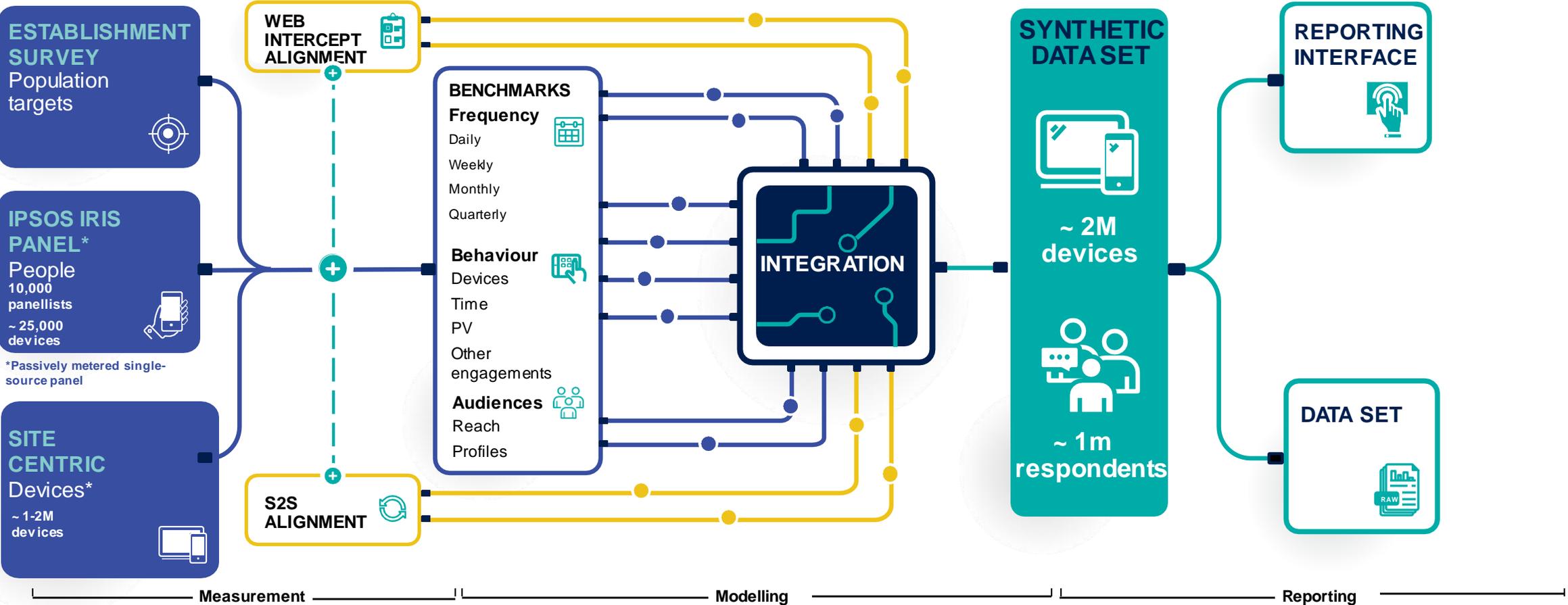
Trend Analysis

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

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)

