

# Getting back on track

Making sense of the path we've travelled and where we're headed

## Let's meet your hosts



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- When **COVID-19 hit, Touchpoints enabled the industry to navigate unprecedented times**, but as the crisis reduces and changes occur, what we face is an unprecedented future
- Today we will talk through the **path we have travelled over the last 6 years**, how 2020 and 2021 de-railed us, and whether it's a case of '**Getting back on track**' or forging a new pathway for the future



Section 3

# Making sense

## The commercial media landscape



# Media Spend Age

Breaking the 65+ adult population down by age allows us to understand how commercial media consumption is changing for different groups. Whilst media consumption for adults is changing, the mix of age groups is also changing. The data indicates that the relationship between the relationship between age groups and time spent is the same. A 20% correlation would imply the relationship between the variables is 40%, different variables are equally the same, which a 20% correlation implies the variables are 90% different.

The correlation between the media time of 16-34s and 55+ from a time spent perspective is 80%.

Comparing the correlation between time spent with commercial media channels for 16-34s and 55+ 2019 media channel share of time spent. R<sup>2</sup> = 27%.



### 16-34

For 16-34s, COV is reach dominant and after which Social Media has the highest reach for this cohort. From 2015, reach with Social Media for 16-34s has grown significantly in the past four years, from both a time spent perspective. Social Media dominates the curated media space and 16-34s spend proportionally twice as much time with Social Media as they do with any other curated commercial media channel.

Other curated commercial media channels, Online Video has also grown significantly for 16-34s with time spent increasing from 4% of all curated commercial media time in 2015 to 18% in 2019. From a reach perspective, Magazines, TV and Radio have seen large percentage growth in 2019. For Newsbrands, whilst the reach for Newsbrands (print) has reduced by 46%, the reach for Newsbrands (digital) has grown by 28%.

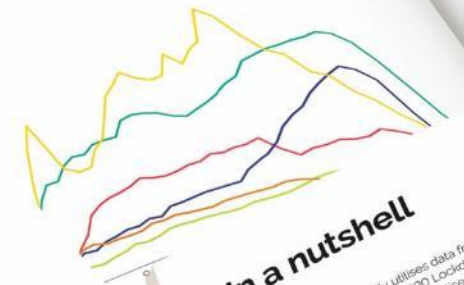
The timeline of commercial media consumption across an average day for media time with a 13% share of media time



### In a nutshell

The report predominantly utilises data from IPA Touchpoints 2020 and 2020 Lockdown editor to help planners and advertisers better understand how the commercial media landscape has evolved and the impact lockdown has on media behaviour.

The report is broken down into three sections: First, the report lays out the broad media landscape today. Then, in section two, we focus on how the 65+ adult population is changing. Finally, in section three, we focus on how the 16-34s adult population is changing.



# Making sense

## The commercial media landscape

Third edition featuring analysis of the 2020 Lockdown

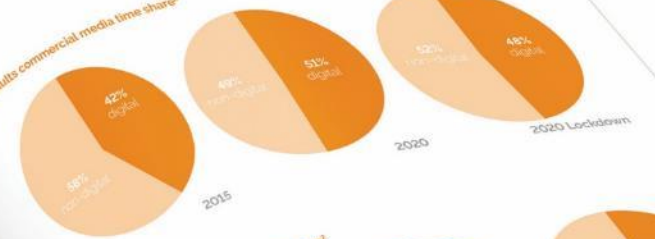


- The media landscape has evolved significantly between 2015 and 2020, with more than ever a greater focus on reaching diverse media plans to maximise overall campaign performance. In the past five years, the gap between commercial media time has considerably widened. Lockdown time has further accelerated this divergence.
- Increasingly media planners are facing challenges when building broad-audience, high-reach campaigns, with the exception of COH pre-lockdown. How video is key for brand building. How video is key for brand building. How video is key for brand building. How video is key for brand building. How video is key for brand building.

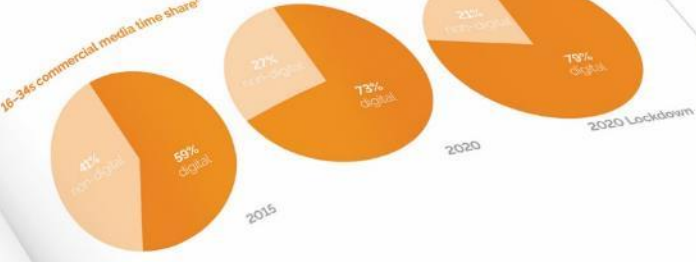
### Share of total commercial media time broken down by buyable media types



### All Adults commercial media time share



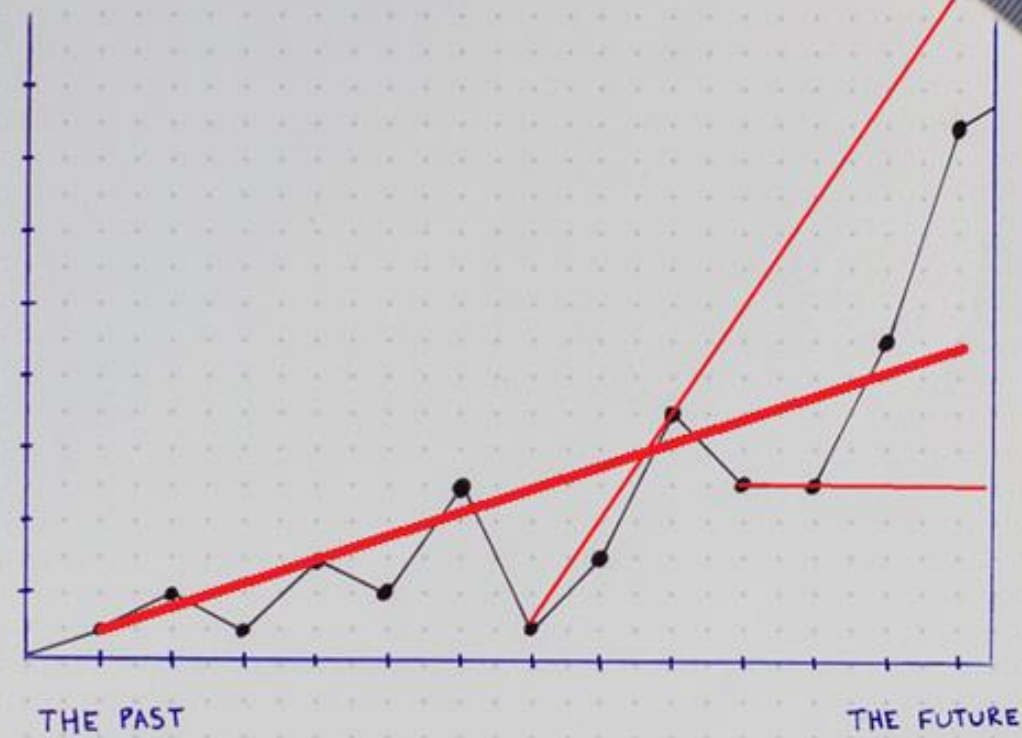
### 16-34s commercial media time share





# Don't overestimate the capabilities of a ruler to predict the future

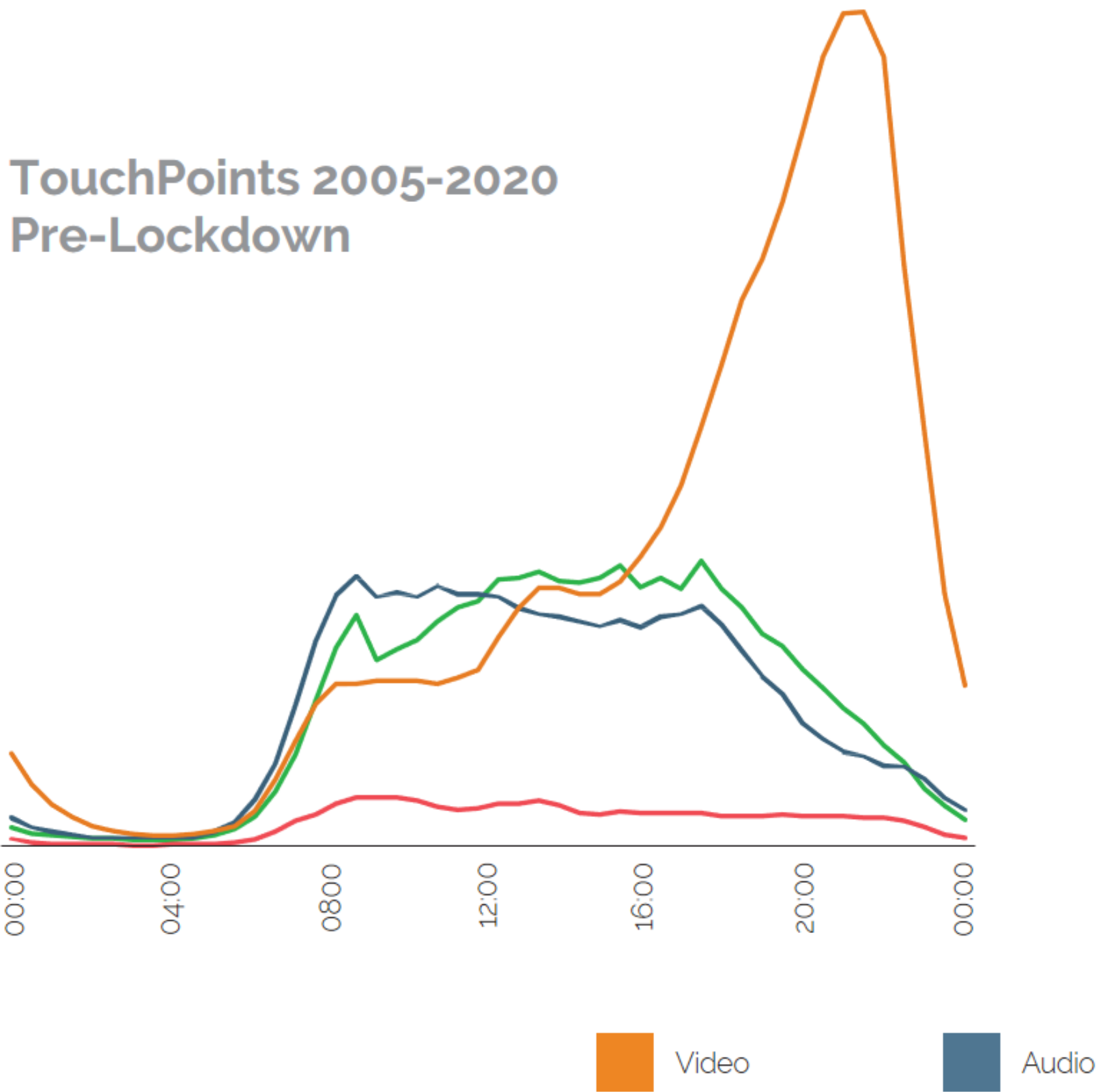
The peril of having long term data in a period of drastic change is that makes the future harder to predict, and short term data can be even more dangerous



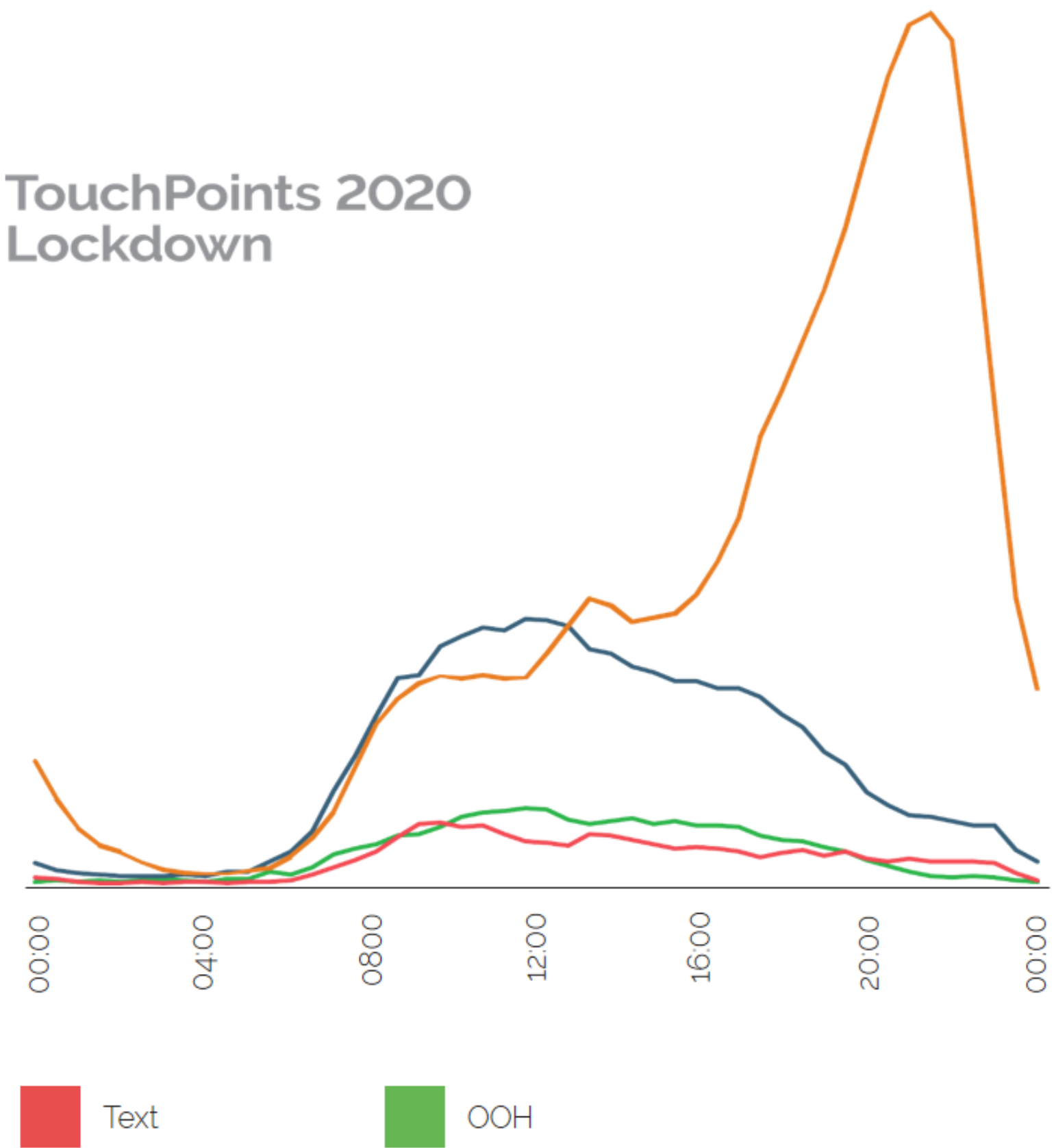


# For 15 years, nothing had changed in the patterns of media consumption until the 2020 lockdown

TouchPoints 2005-2020  
Pre-Lockdown



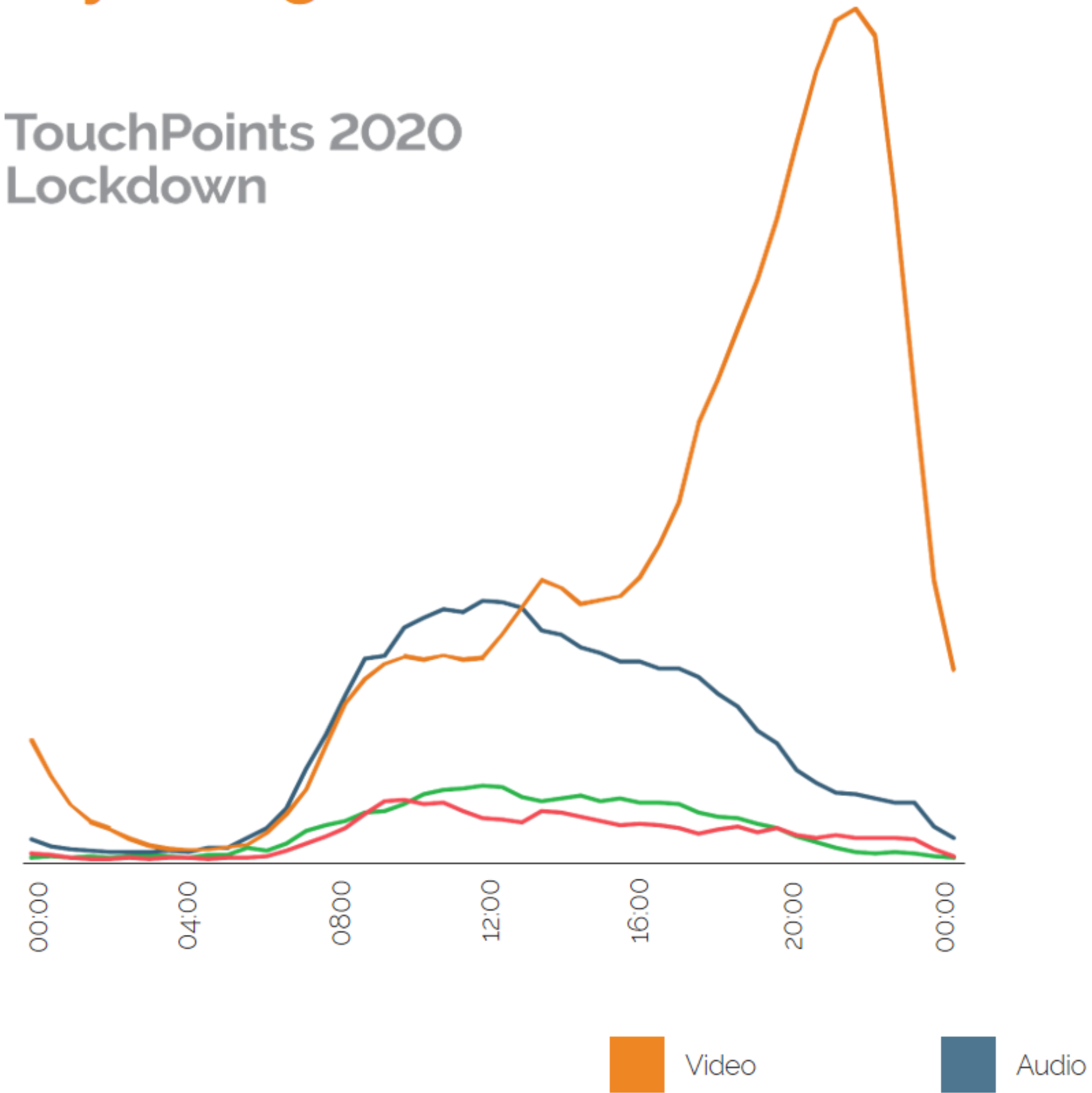
TouchPoints 2020  
Lockdown



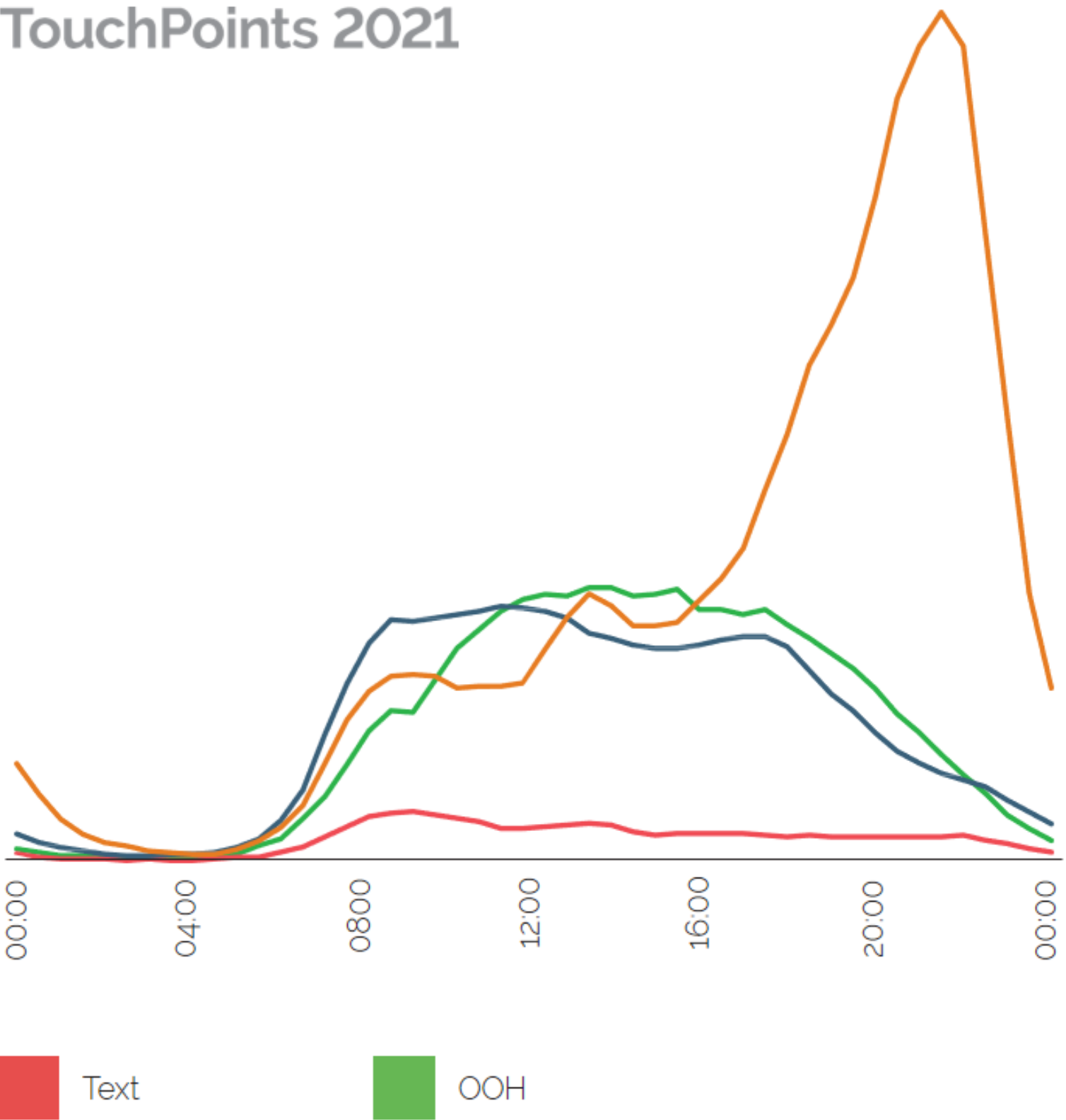
Source: TouchPoints 2020 / 2020 Lockdown - Grouped media reach across an average day for GB adults.

# And after the shift was observed many thought the world would never be the same again

### TouchPoints 2020 Lockdown



### TouchPoints 2021

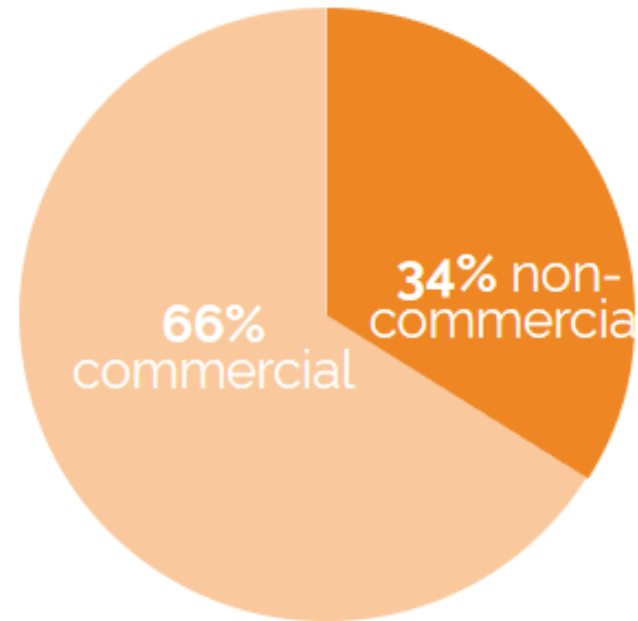


Source: TouchPoints 2020/2021 Lockdown - Grouped media reach across an average day for GB adults.

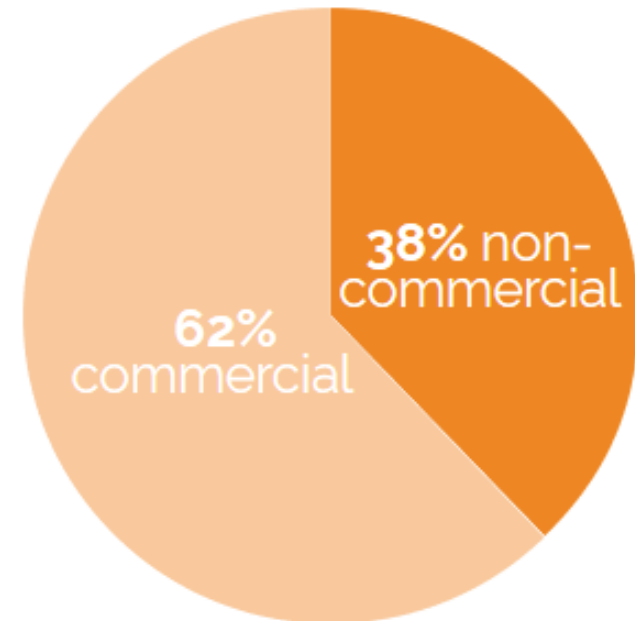
# Commercial media is over, its all Netflix these days, isn't it?

## Commercial media still accounts for almost two thirds of total media time

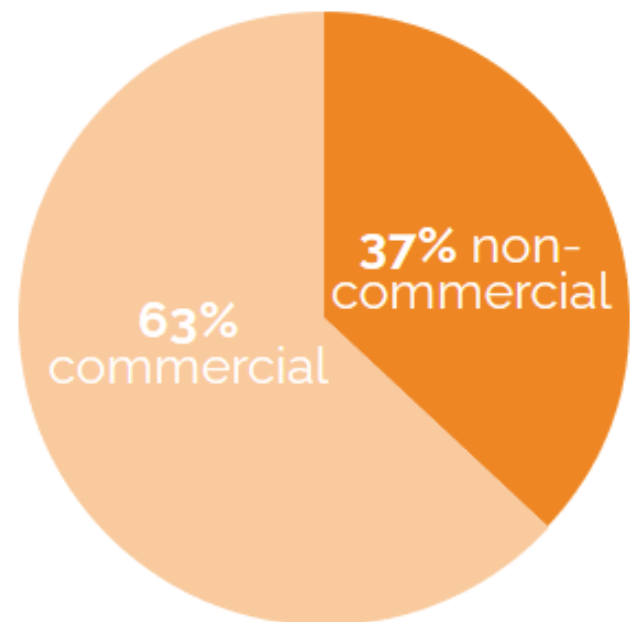
### Adults



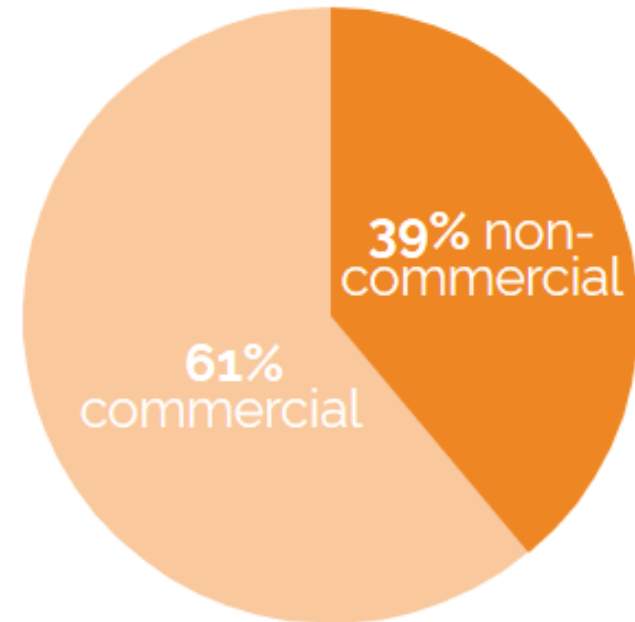
2015 8hrs 27mins



2020 8hrs 3mins

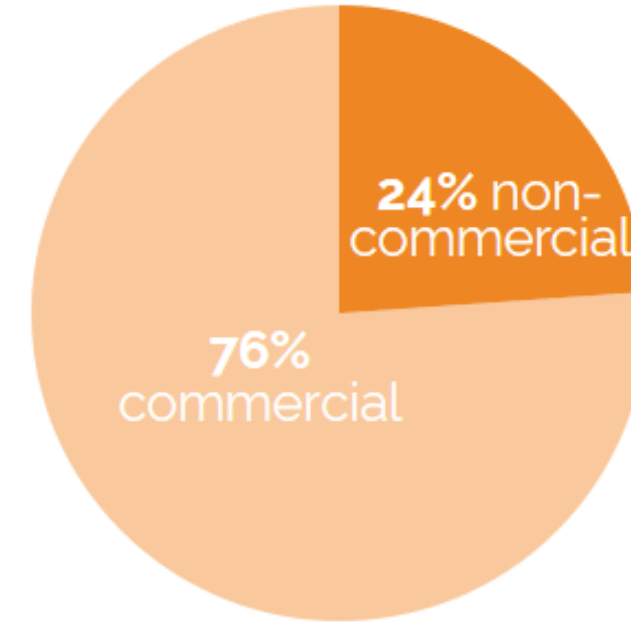


2021 Lockdown  
8hrs 46mins

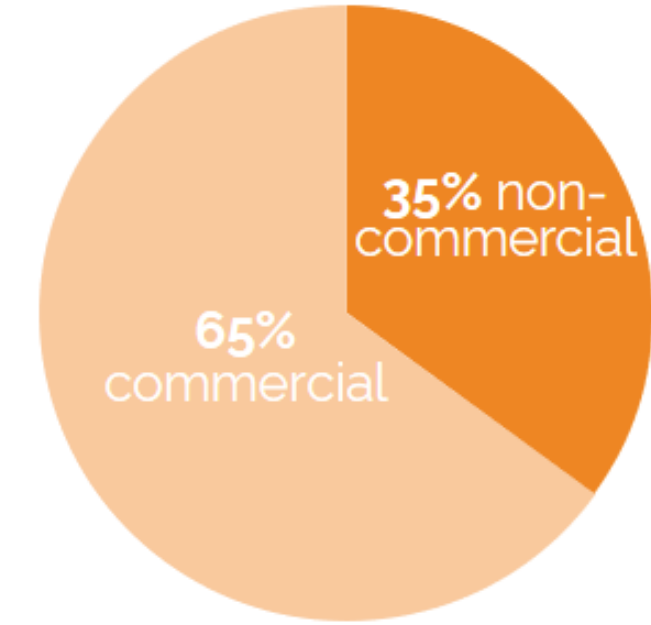


2021 7hrs 39mins

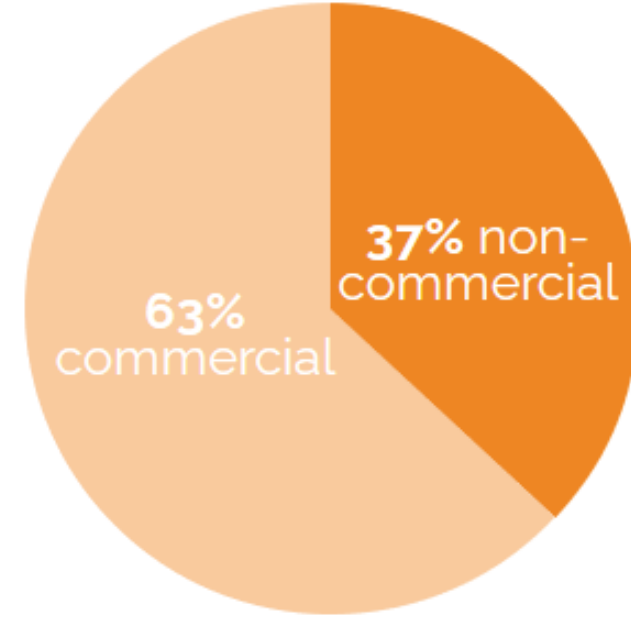
### 16-34



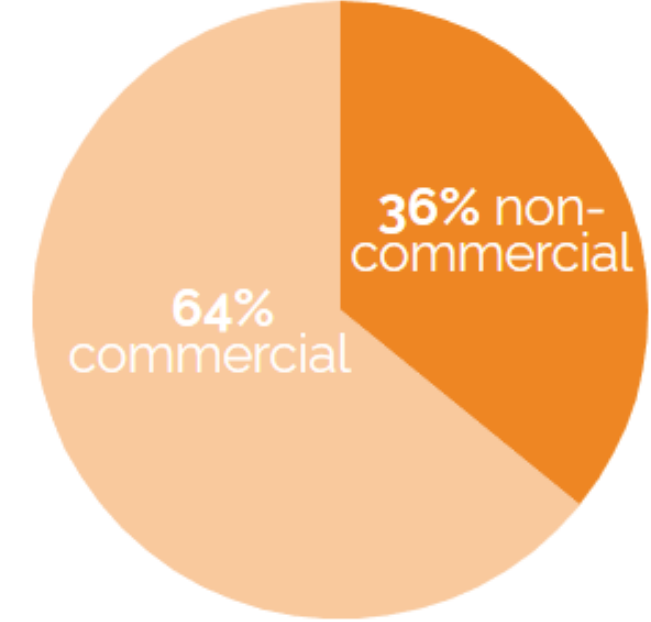
2015 8hrs 13mins



2020 7hrs 28mins



2021 Lockdown  
8hrs 3mins



2021 7hrs 23mins

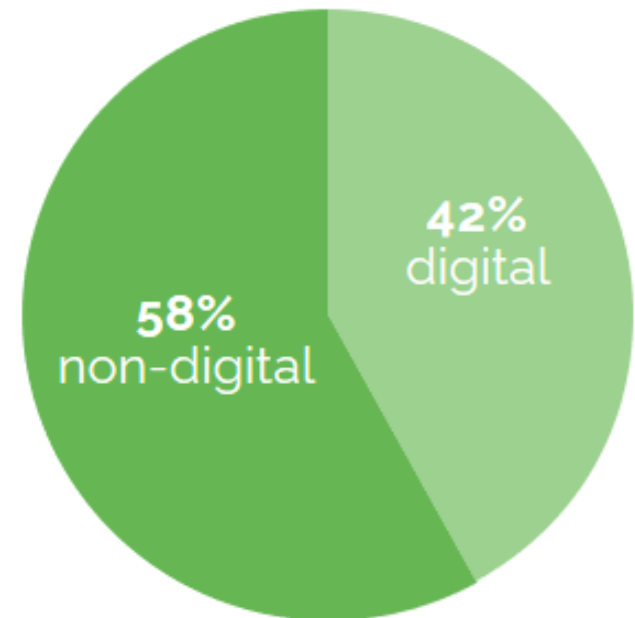


**What changed  
and what can we  
learn from it?**

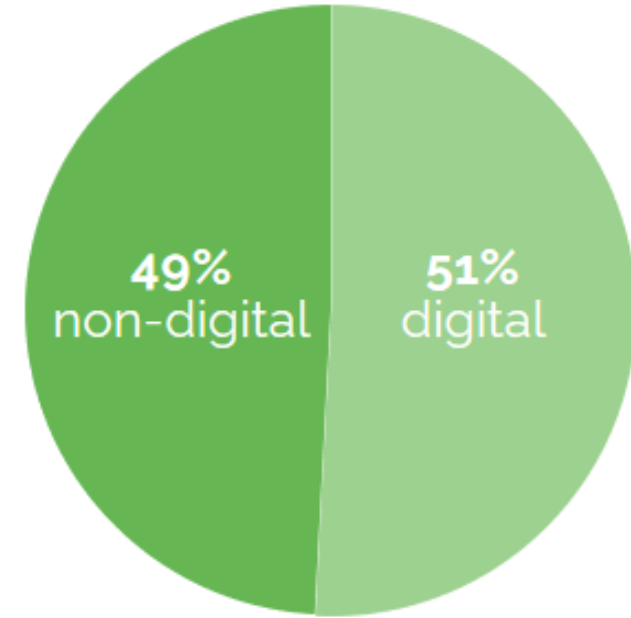
# Everything went digital under the pandemic, didn't it?

## Not so much, and understanding why is vital for planning ahead

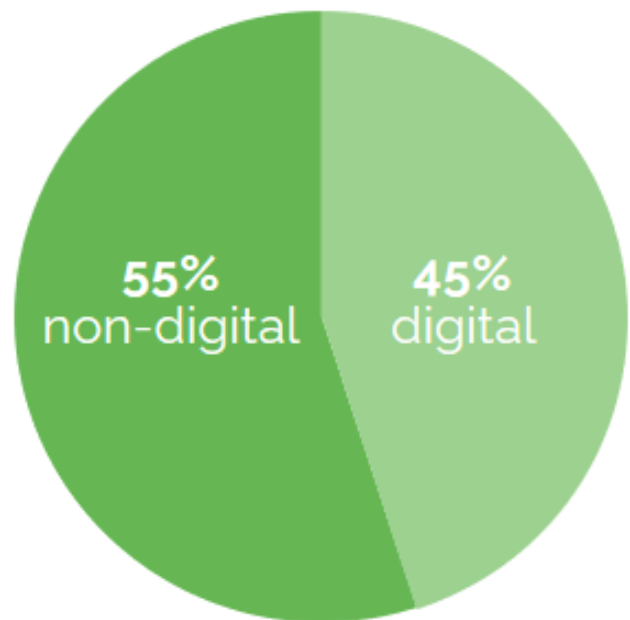
### Adults



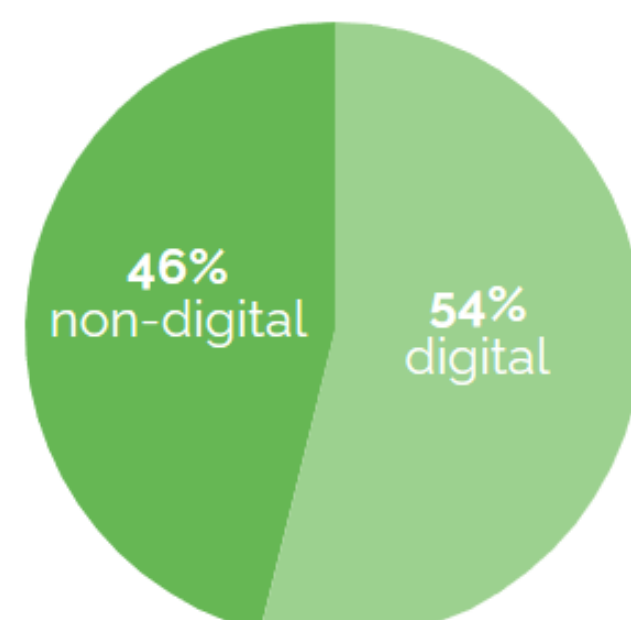
2015



2020

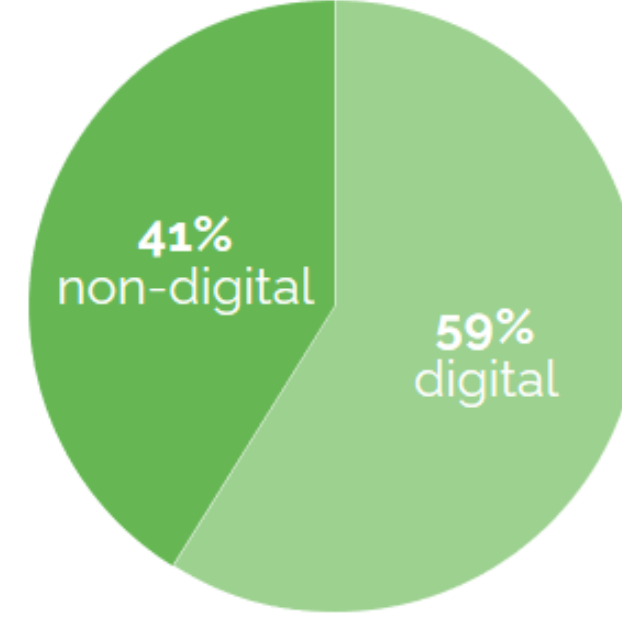


2021 Lockdown

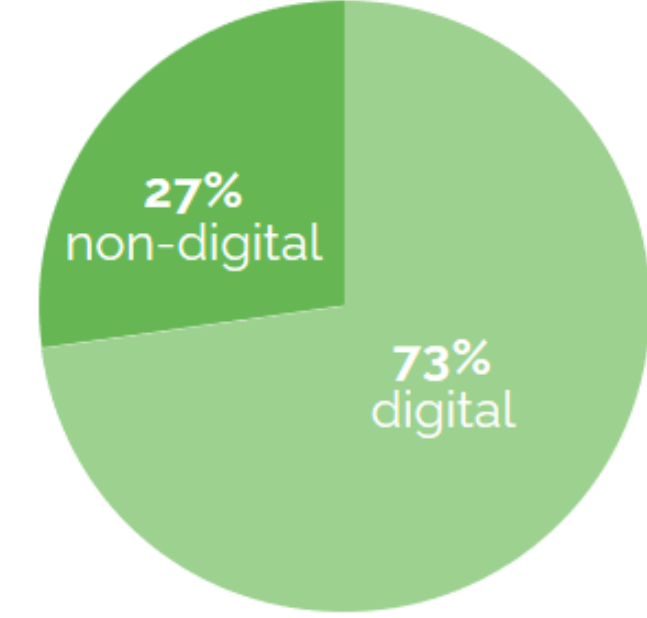


2021

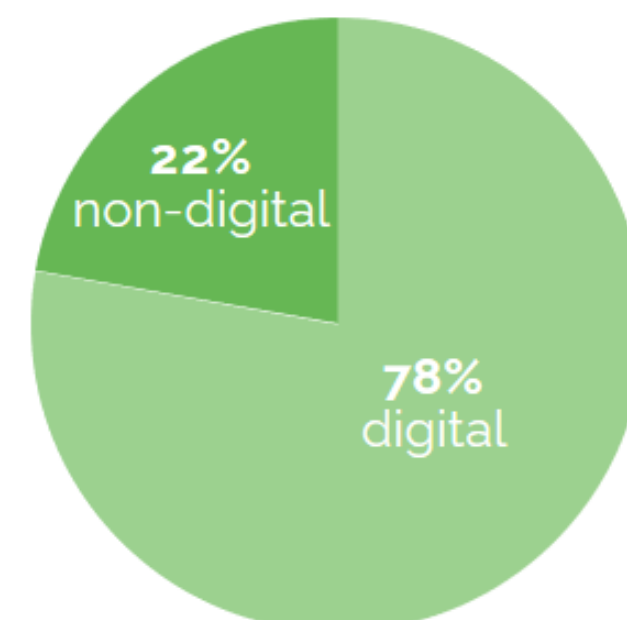
### 16-34



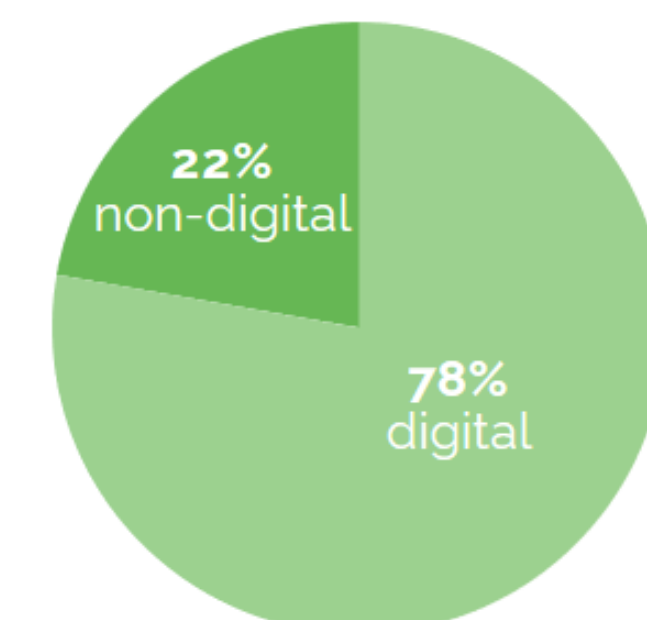
2015



2020

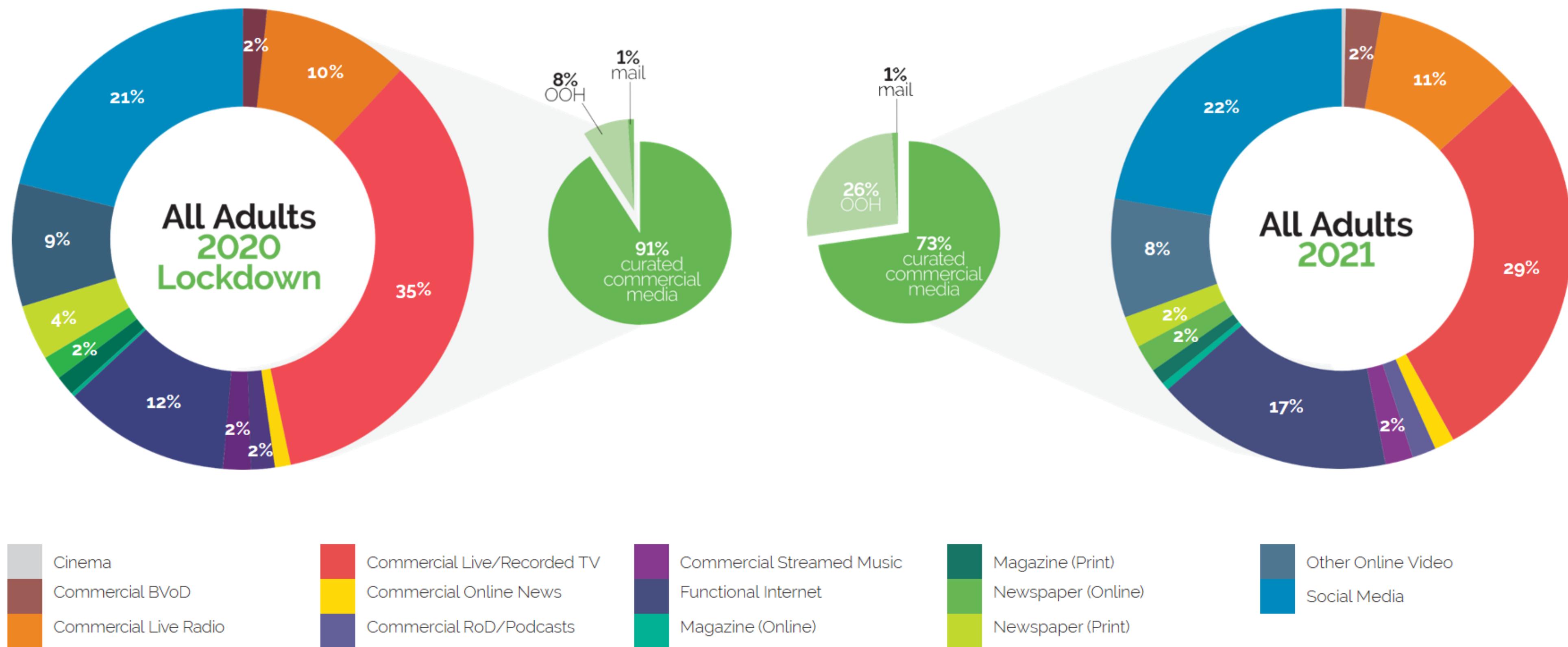


2021 Lockdown



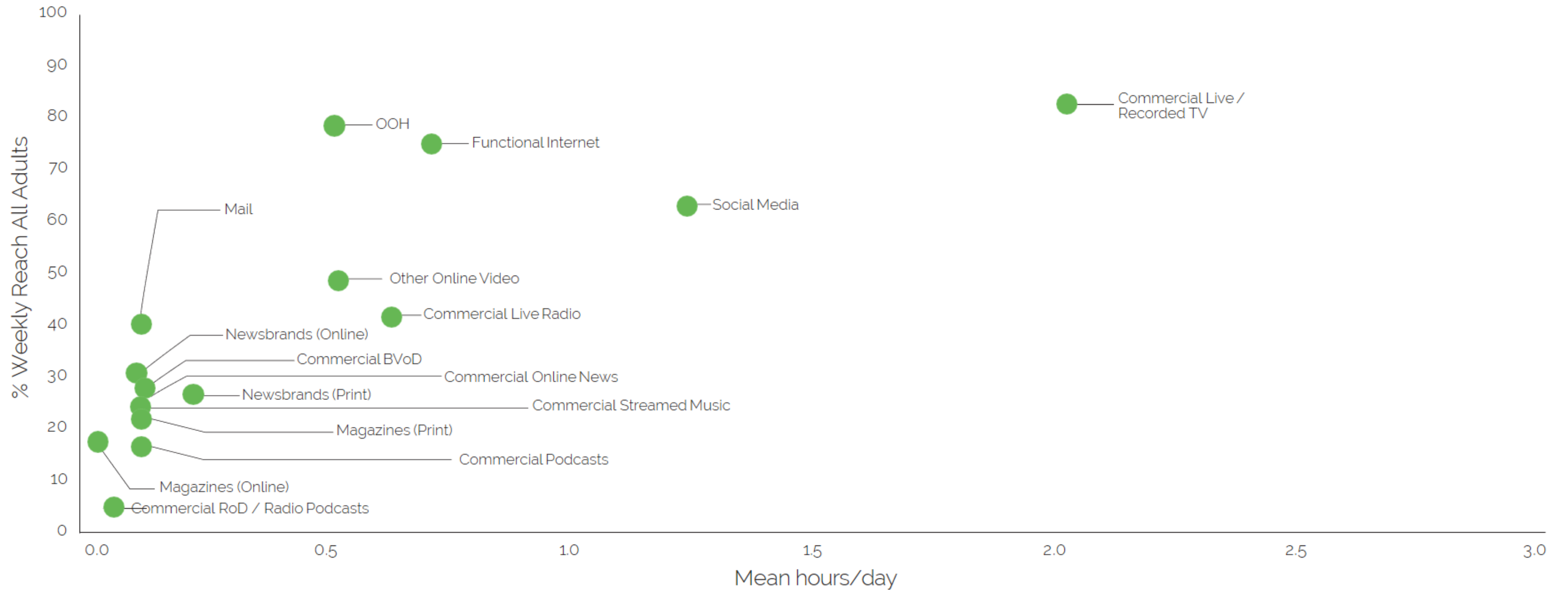
2021

# All Adults: again shifts throughout lockdown haven't followed expected trajectories

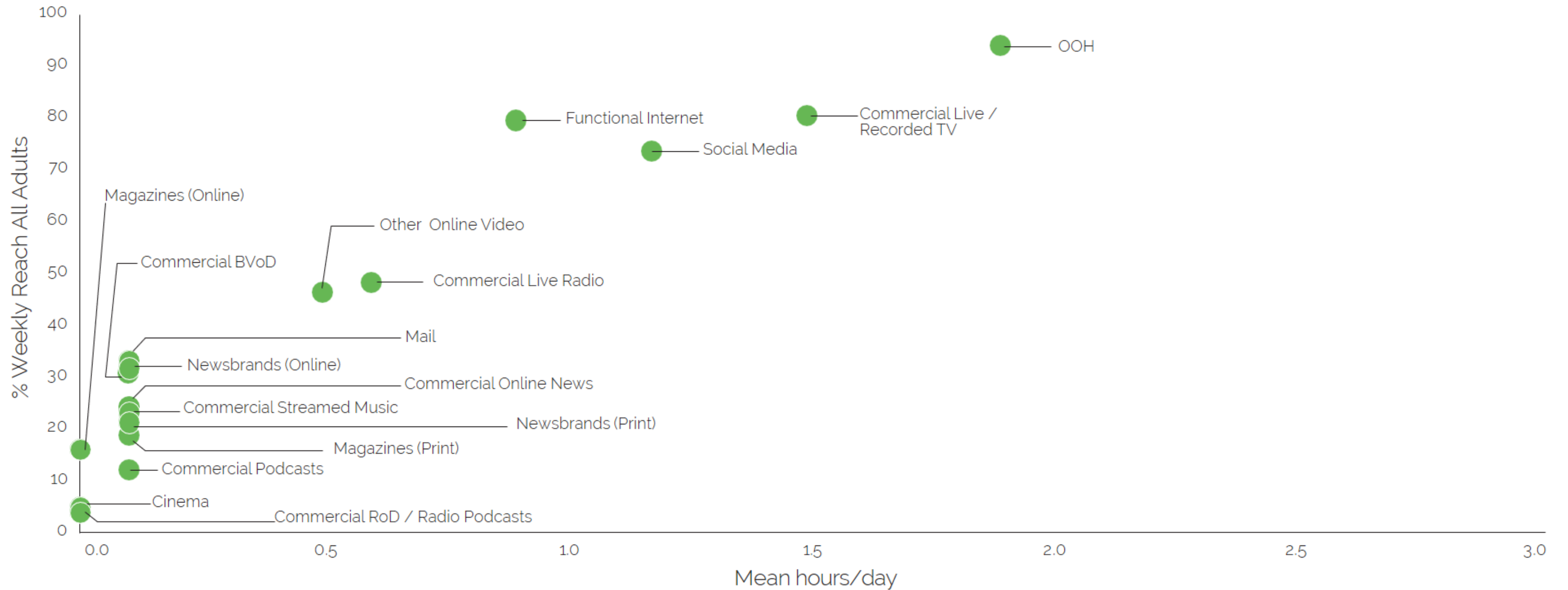


Source: IPA TouchPoints 2020 Weekly total share of time spent with commercial media for all adults in GB, broken down by media types

# All Adults: In 2020, there was a lockdown and nobody went Out of Home, right?.....Errr



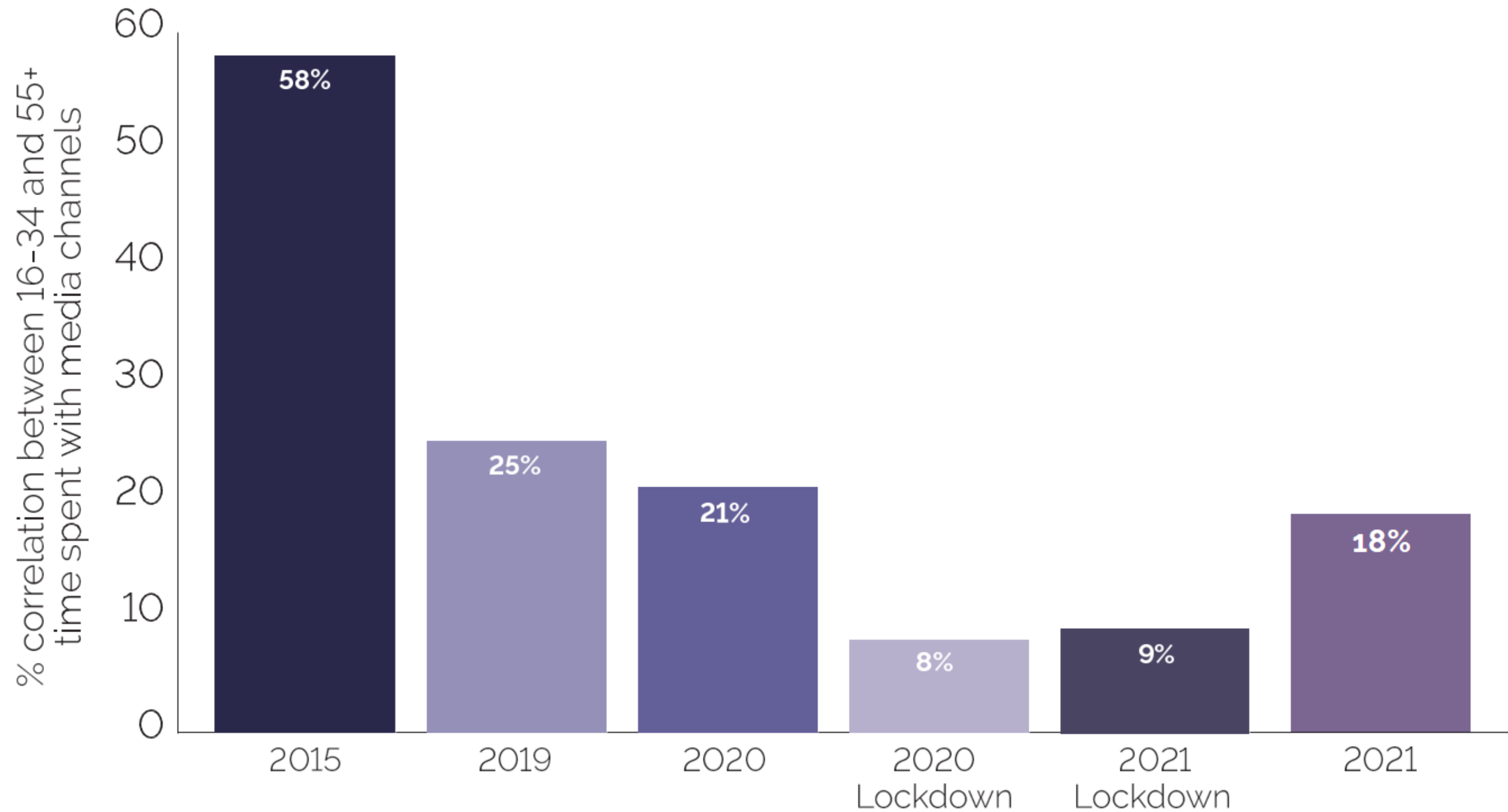
# All Adults: under lockdown, the key changes were actually in time spent rather than reach, which was often not reflected in industry narratives



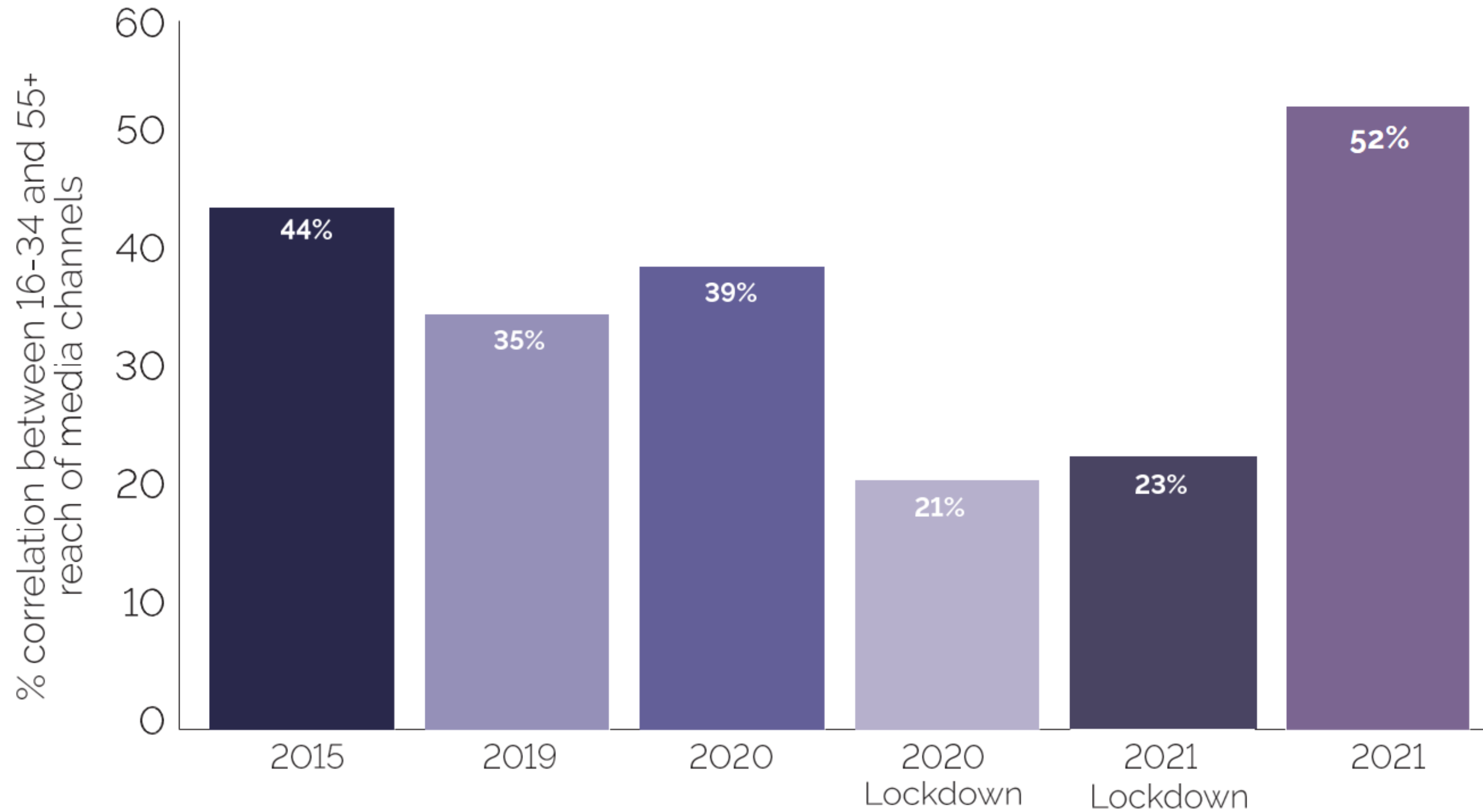


**Plan for averages  
and it's a case of  
one size fits none**

## 16-34 and 55+: Lockdowns reinforced the differences in commercial media time, but following that trend won't get us back on track

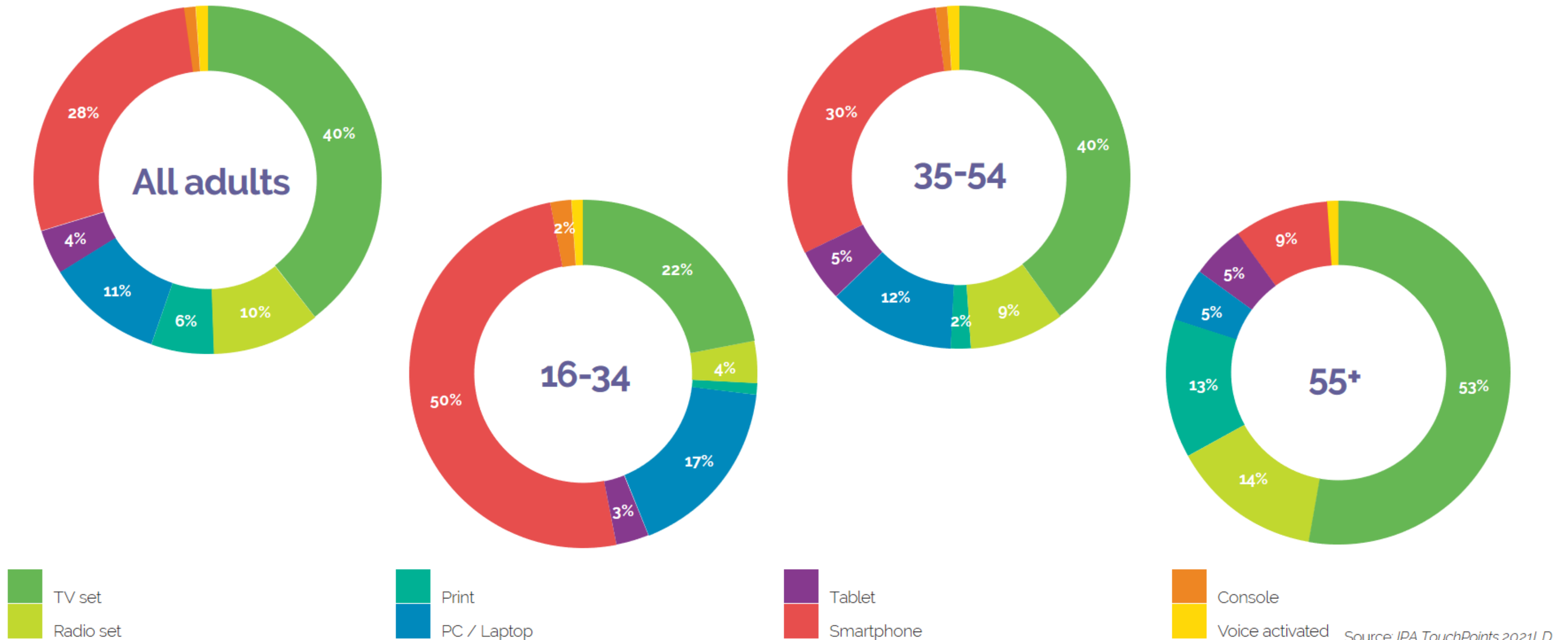


# 16-34 and 55+: In terms of reach, the rise of social amongst 55+ has shifted the needle – short term planning would have sent us down the wrong path



# Device usage after a year of lockdown

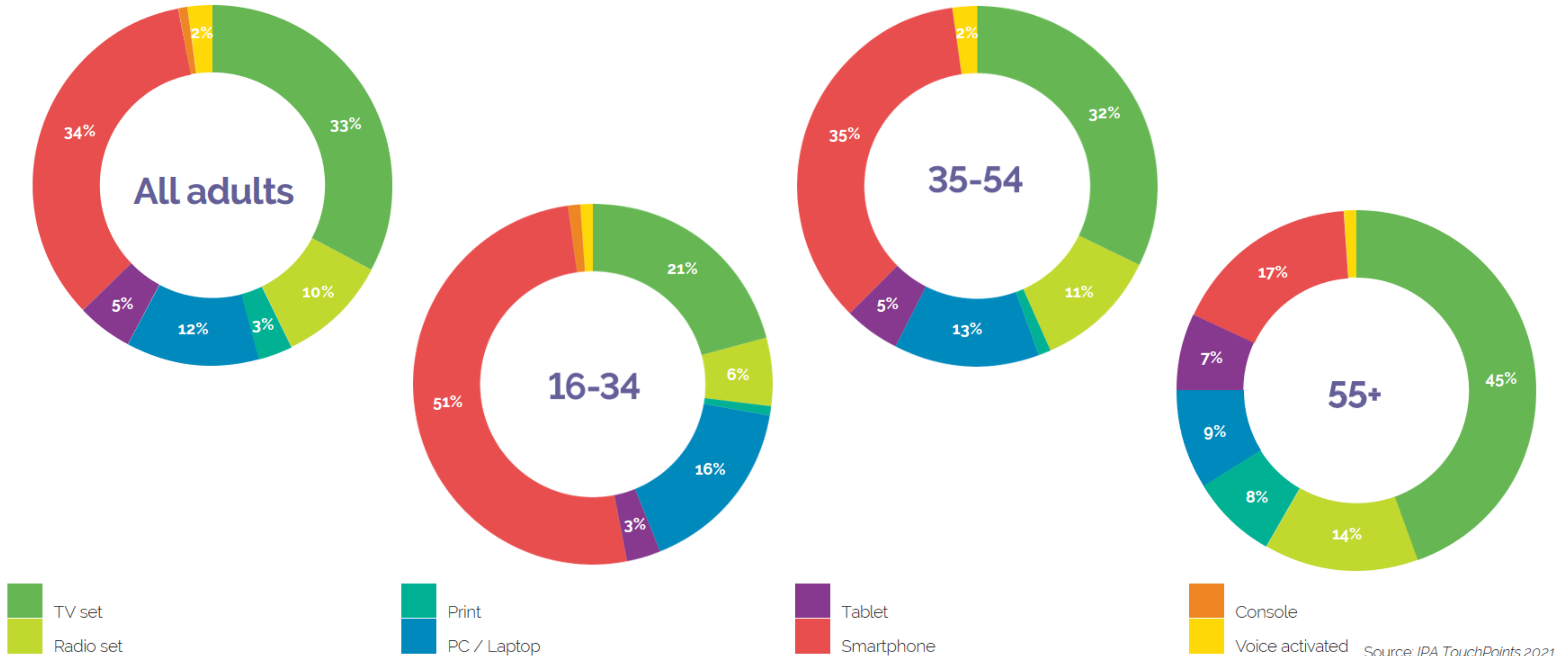
Changes experienced over the year, seemed to be remaining



Source: IPA TouchPoints 2021LD

# But looking at lockdown data alone left us in the station

## The digital train is certainly coming, but some are on a fast track and others a stopper



Source: IPA TouchPoints 2021



**So...**

**What next?**

Quantitative data only takes us so far in predicting the future



**How has the pandemic changed your lifestyle and how long do you think these changes in your behaviour will last?**

**Think about your day to day habits including shopping, working, travelling, socialising, how you spend your free time etc.?**





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Lifestyle and health

Localness

Family and education

Shopping

Work-life balance



**More leisure time spent with family  
in local region**

**I appreciate the countryside more**

**I have also discovered beautiful  
walks in nature since the start of  
the pandemic**

**I no longer meet friends or go out  
beyond my town**







**We have spent most of our time exploring new locals areas**

**Daily local walks, I think that this will continue**

**As I have a young family, we have discovered the local area through walks**

**It has caused me to become very anxious about going outside of the local area**





Any shopping is done locally or online

I did more online shopping than ever before. It was a joy to see the Hermes or Amazon delivery person, sometimes the only person I would see that day

I'm more aware of supporting local businesses and buying locally sourced food

I will continue to shop locally and using online to facilitate this

We shop online but also use local shops more



Buy less of better quality  
to avoid clutter and  
wasting money

I plan my food  
shopping more



I make fewer trips to the  
local shops and I plan my  
food shopping more

Buying more quality  
food and drink, less  
clothing

Shopping much  
more locally



**The mix of in work and working at home has improved my work life balance**

**Love being able to work from home. My mental and physical health has never been better**

**Working - spending longer hours as starting earlier due to no travel**

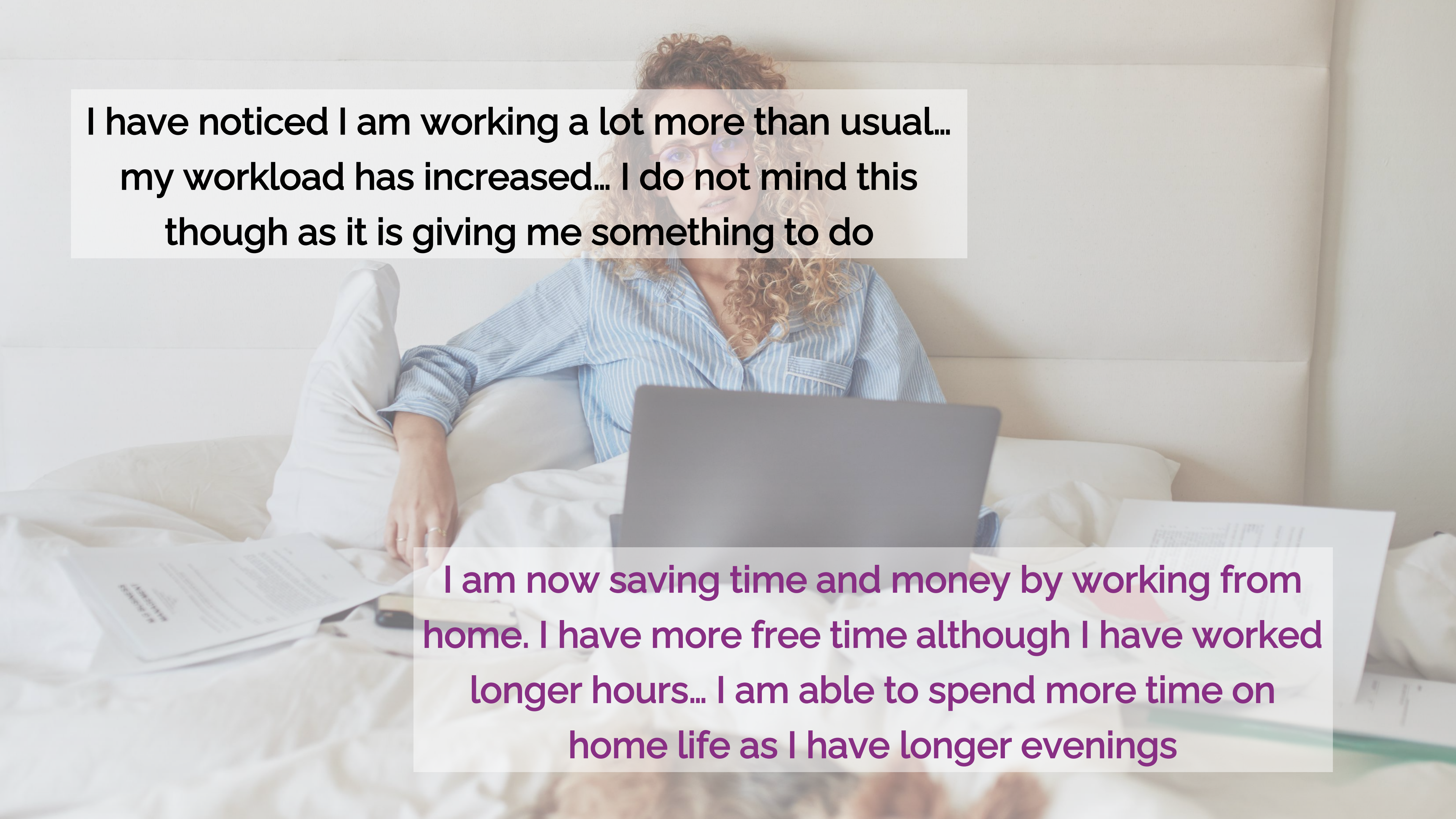
**Working from home has greatly increased time spent with family**

**I am working more hours than when I was in the office**

**Working from home has also meant back to back Teams meetings, with no break...**







**I have noticed I am working a lot more than usual...  
my workload has increased... I do not mind this  
though as it is giving me something to do**

**I am now saving time and money by working from  
home. I have more free time although I have worked  
longer hours... I am able to spend more time on  
home life as I have longer evenings**



**Children**  
**and home schooling**

**Challenging** **Stressful**  
**Exhausting** **Hopeless**

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**“ Home-schooling is one of the worst things to ever  
happen to the country.  
The people who choose this are mentally ill.”**

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“**Home-schooling is one of the worst things to ever  
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“**...I was so happy to have so much  
time with my son and my partner**”

“**I love having my daughter at home...  
she is great company...**”

“**...my kids have made me so proud  
with everything**”

## Young people

**I did not get to celebrate my final university year due to covid**

**...I am still missing out on the most important time of my life**

**The pandemic has severely damaged the university experience...**

**The remote learning has been insufficient... I feel I have fallen greatly behind. ... there is much uncertainty about how I will be assessed for my final grades. My entire future is suddenly uncertain**



**Reduced alcohol to very small amounts, and not missing it**

**My alcohol intake has decreased, and I realise I don't need it as much**



**I definitely drink more alcohol and buy more takeaways**

**I am drinking more ... I have put on about two stone**



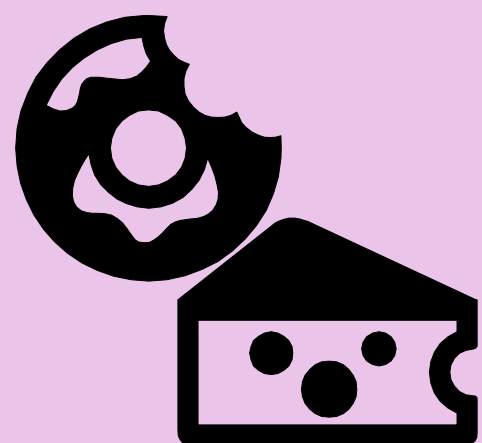


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**Eating more fresh vegetables**

**The pandemic has made us cook more**

**I eat more unhealthy food**

**I have also found I have become a bit more unhealthy with regards to my diet and I have put on a few stone**

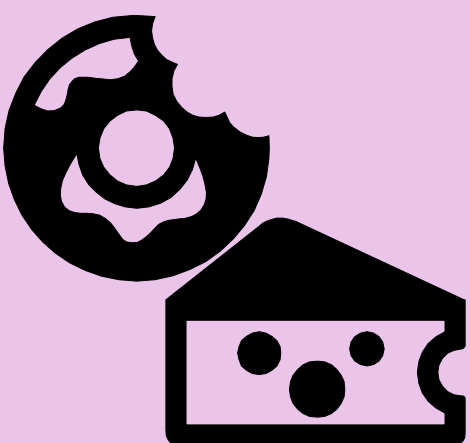


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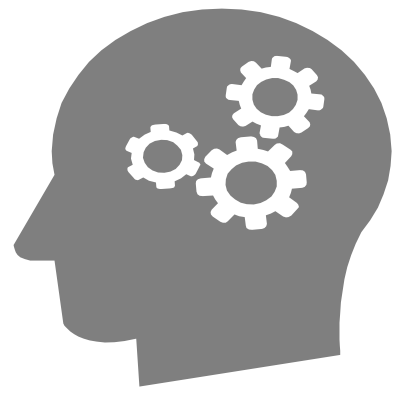


I have significantly increased my level of exercise throughout the pandemic

I am exercising more and have lost a stone and a half

My levels of exercise have dramatically reduced

The pandemic really made unhealthy as I was going out less and didn't go to the gym



I feel I have aged at least  
five years since the illness

**Felt like my mental state  
has drastically decreased**

**My mental health has suffered  
but so has everyone's**

It has been a lonely and isolating time





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It has made me appreciate people a lot more, including friends, family and work colleagues

**My life has improved, more peaceful, less stressful**

**It has encouraged us to re-evaluate our lives**

I notice nature more and very much appreciate teachers and the NHS

The pandemic has taught me to live by the day, ...be grateful to have what I have. ...use the opportunity to re-think what I do and why

**I certainly appreciate time with family/friends more precious than ever before**

***“I lost my job***

***I got into a lot of debt***

***I fell in love***

***I had a lot of time off***

***But I learned a lot about myself***

***I become a lot more confident***

***I become happier”***

# Thank you

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