



THE SHOW 
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Keep on keeping on

Making Sense: Understanding the impact of the lockdown on the commercial media landscape in 2020 and beyond



FACEBOOK

Let's meet your hosts



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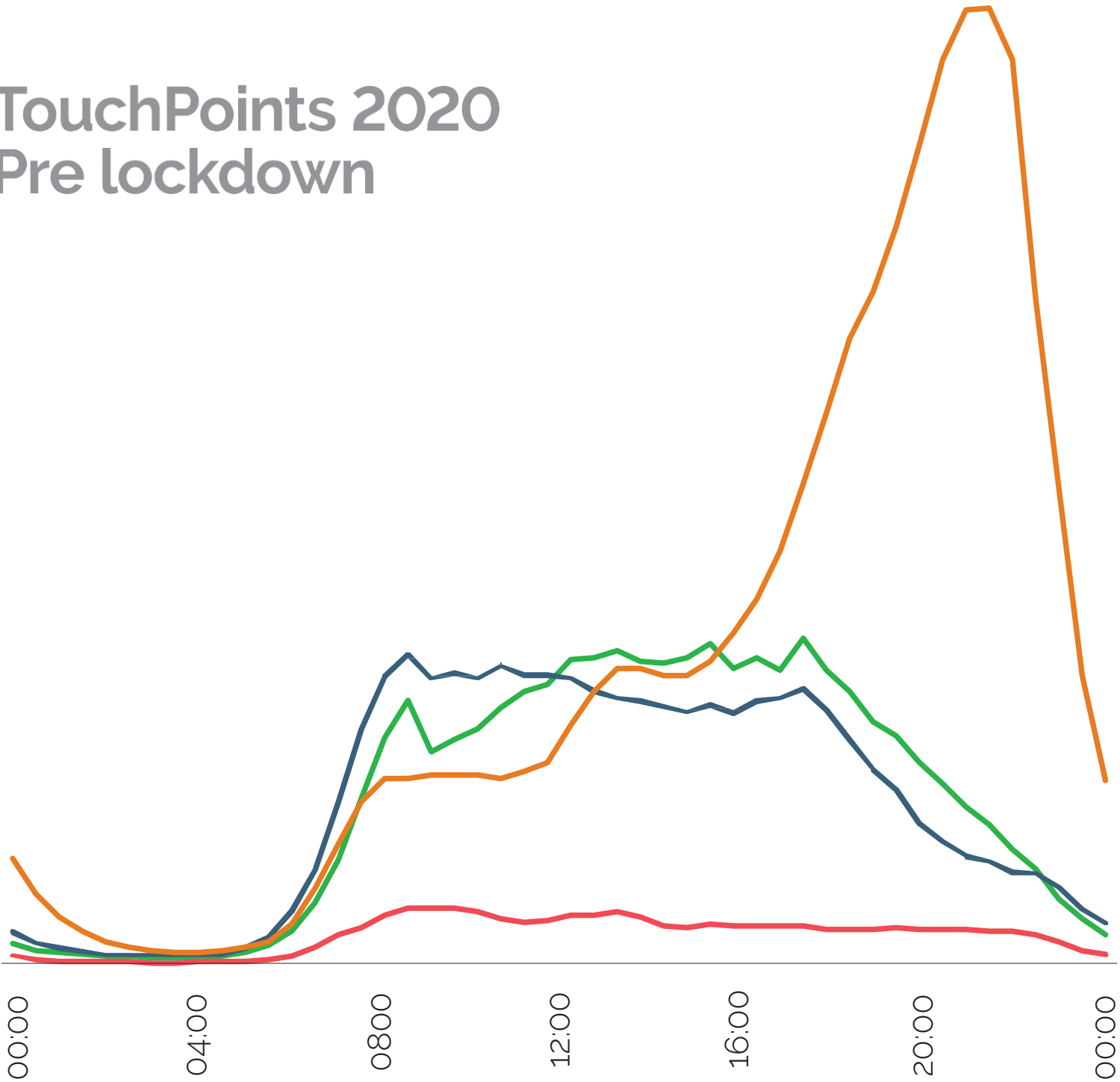


Introduction

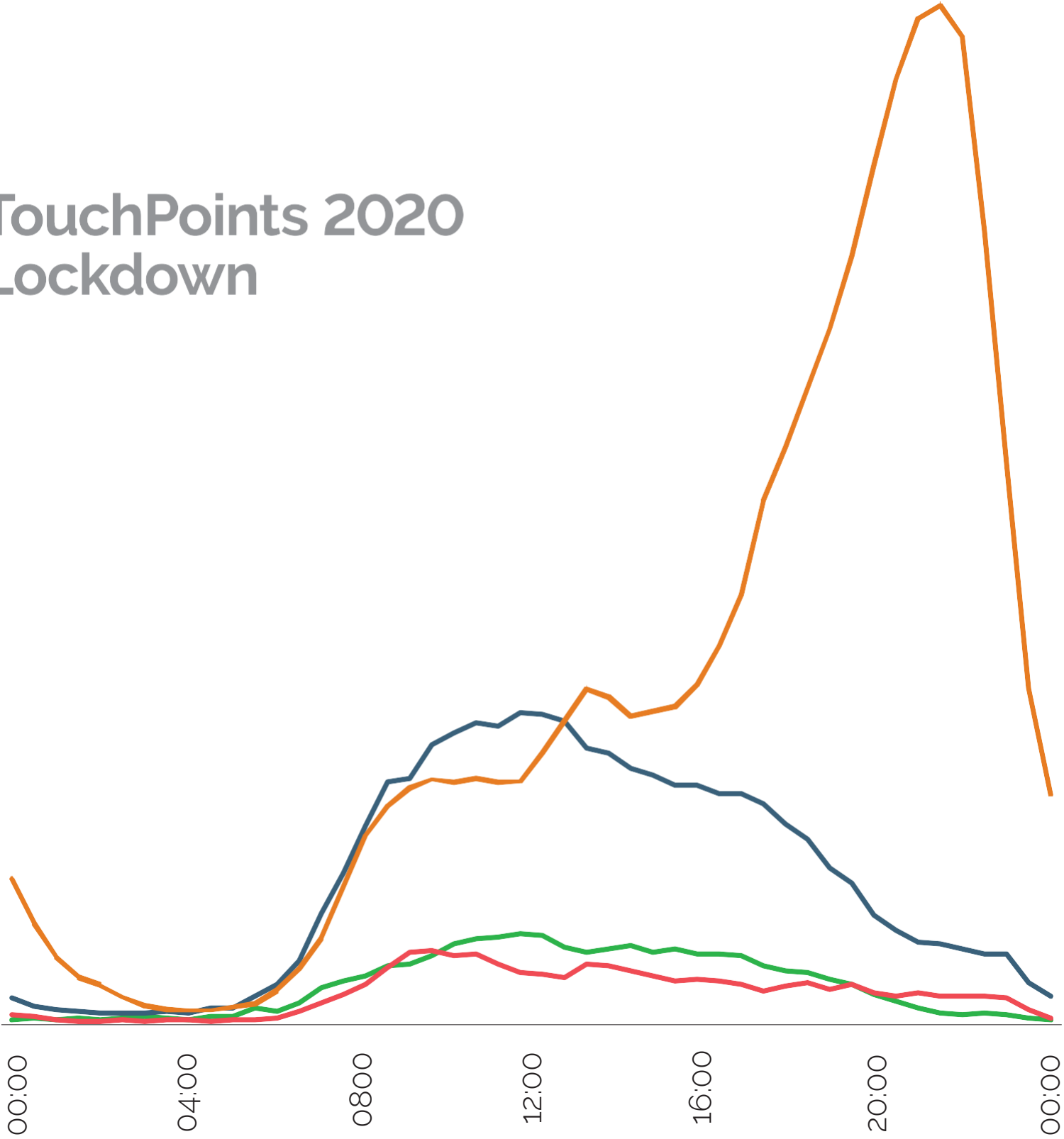
- TouchPoints has been the industry standard for cross-media measurement since 2005
- 2020 presented a particular challenge for us as the country went into lockdown in the middle of our Jan-May fieldwork period where 6000 GB adults took part
- We needed to ensure that the industry could turn to the IPA and TouchPoints to give them clarity on changes in consumer behaviour and media consumption
- We wanted to help the industry find the truth amongst all of the myths which were circulating around media consumption under lockdown
- 2021 will see the publication of the third edition of the landmark report – Making Sense: The Commercial Media Landscape – Over 40,000 downloads to date

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

TouchPoints 2020
Pre lockdown



TouchPoints 2020
Lockdown

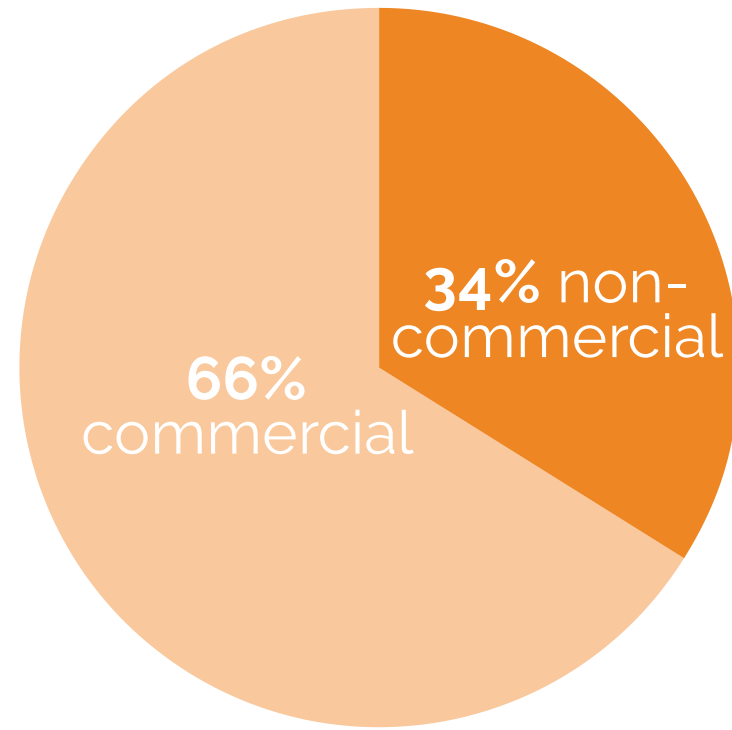


Video Audio Text OOH

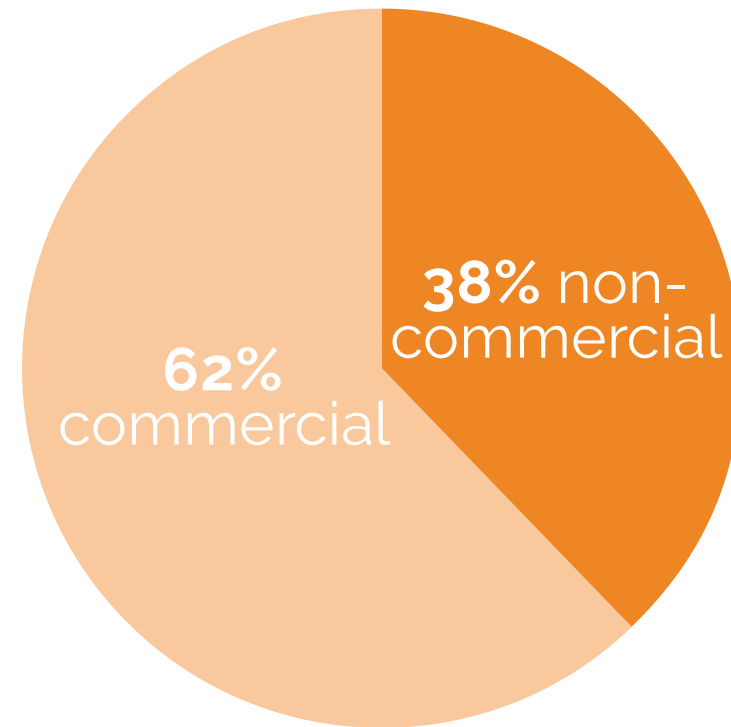
Source: TouchPoints 2020 – Grouped media reach across an average day for GB adults.

If everyone just watches Netflix these days... How much of curated media is actually commercial?

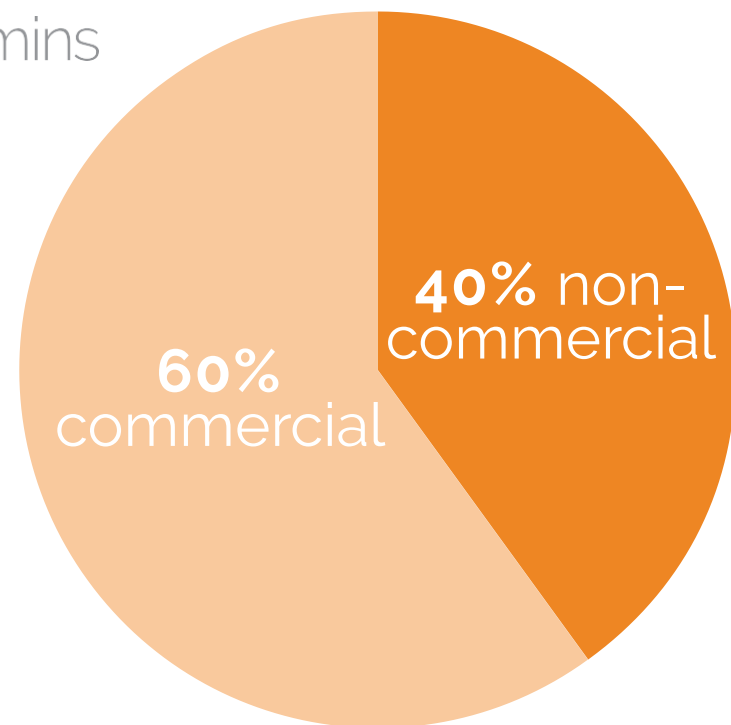
Adults



2015
8hrs 27mins

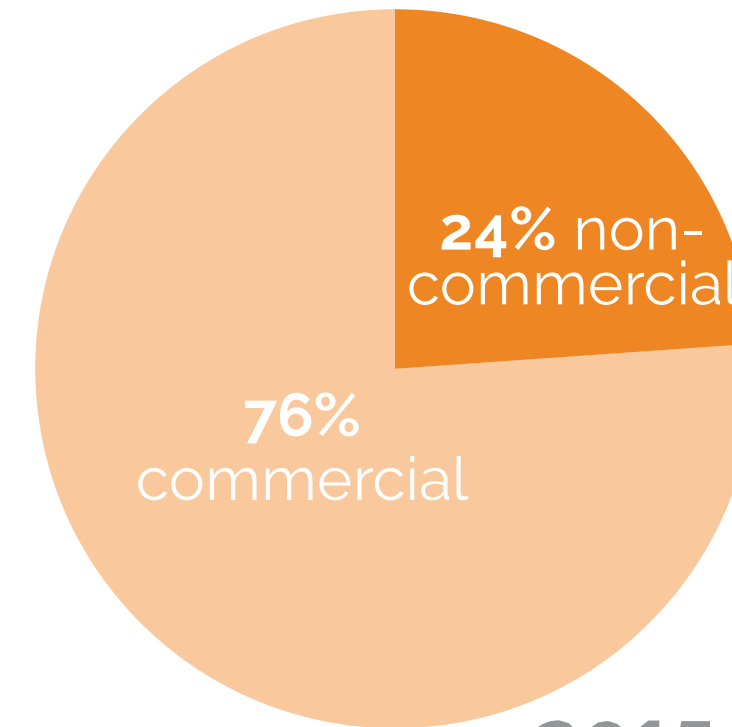


2020
8hrs 3mins

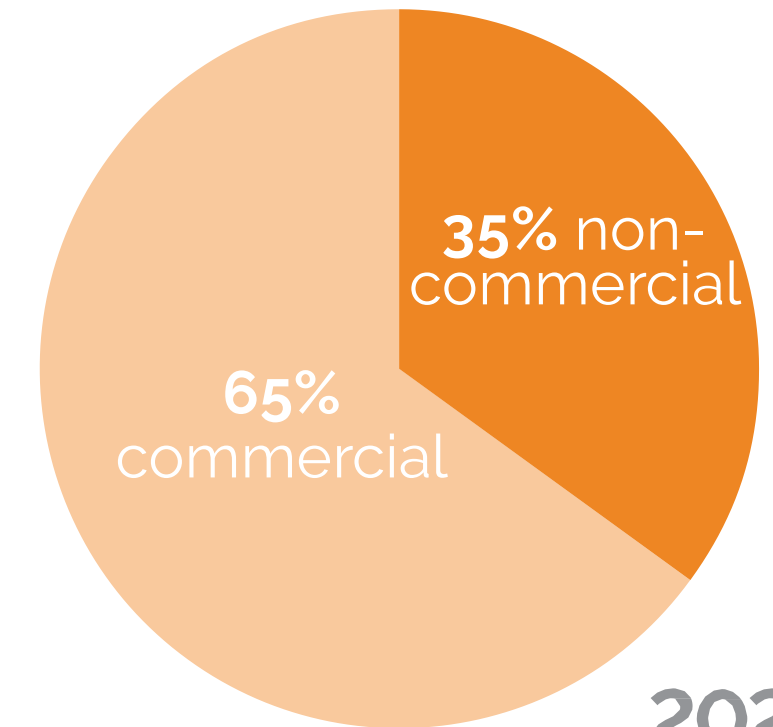


Lockdown
8hrs 26mins

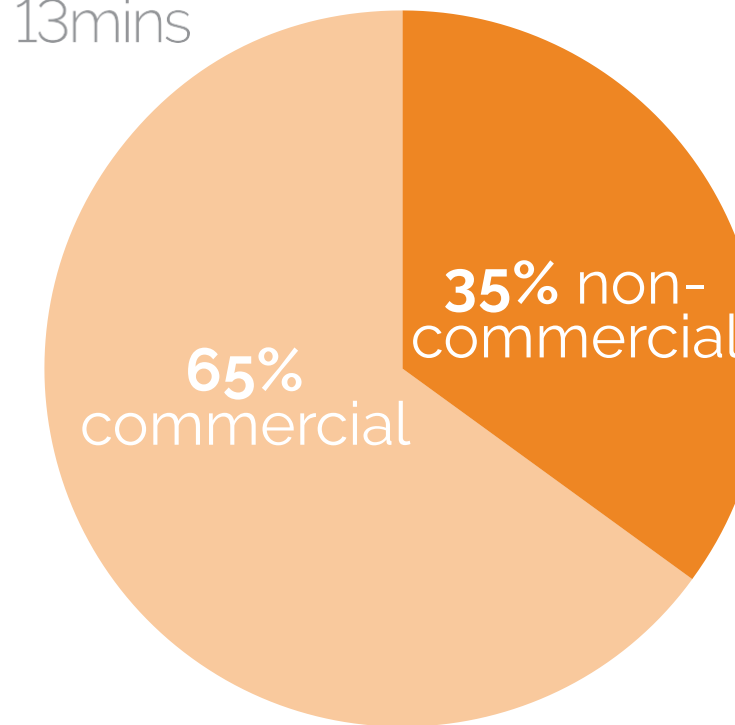
16-34



2015
8hrs 13mins



2020
7hrs 28mins



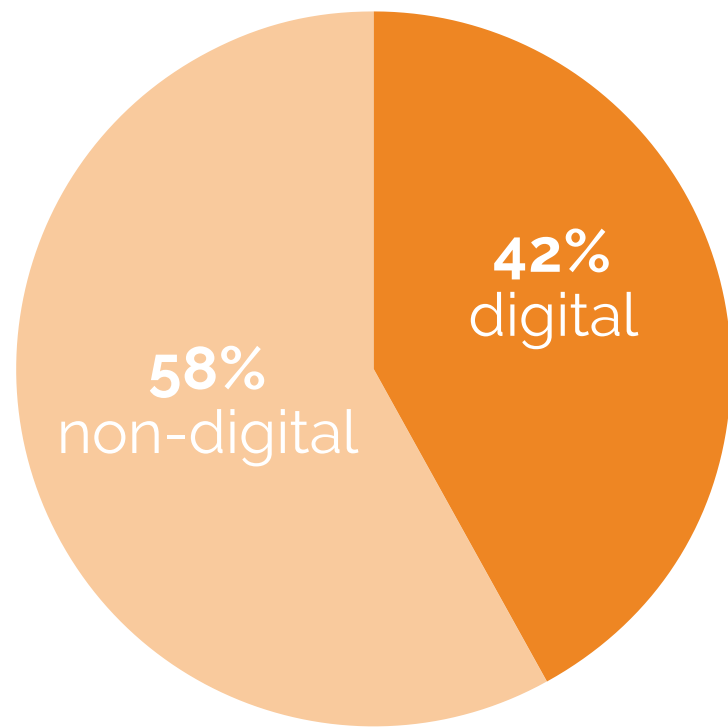
Lockdown
7hrs 53mins

Source: TouchPoints 2020 - Share of time with curated media channels split by commercial/non-commercial

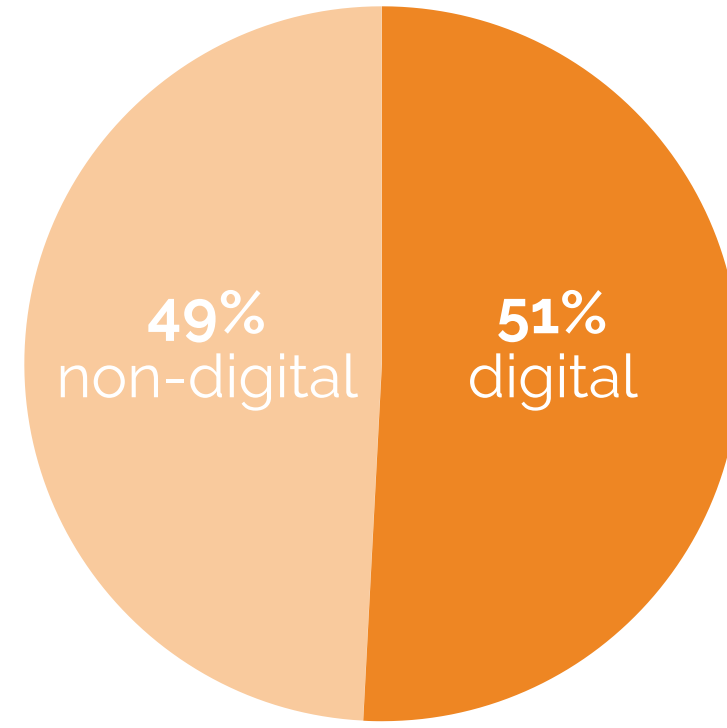
What is the digital/non-digital split for commercial media What about Zoom and the lockdown tech revolution?

Adults

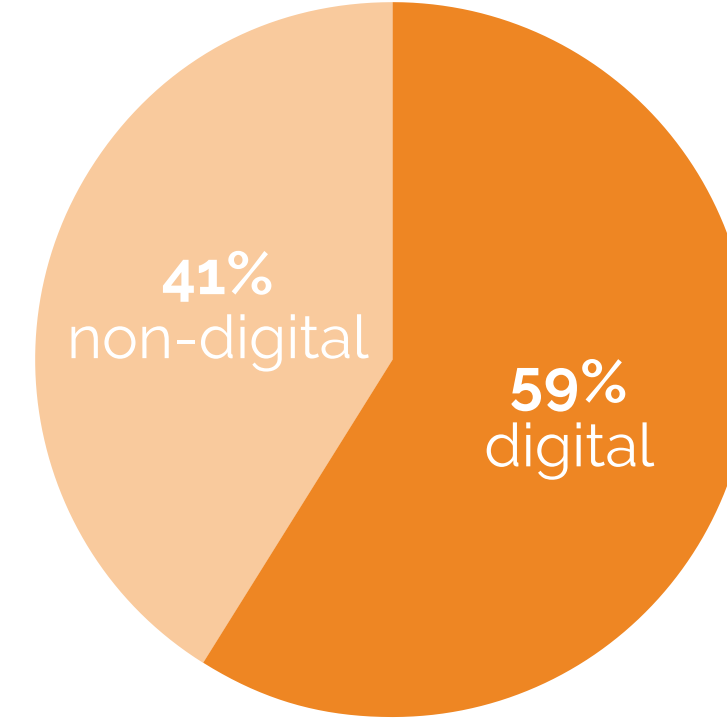
16-34



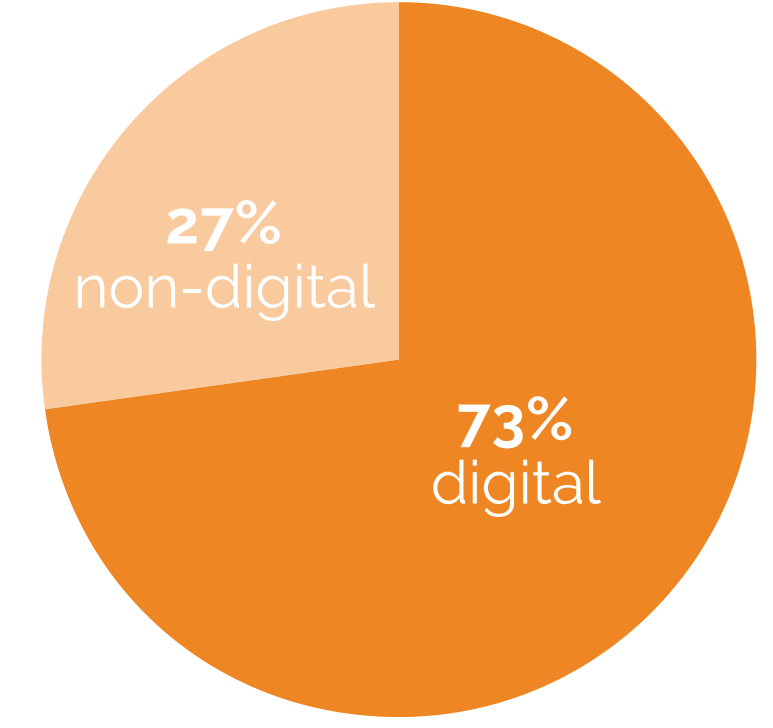
2015



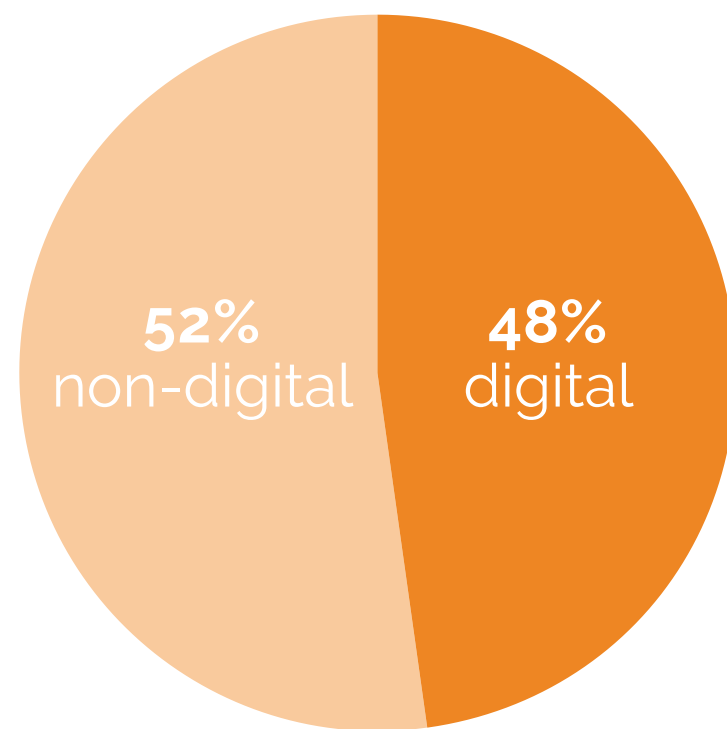
2020



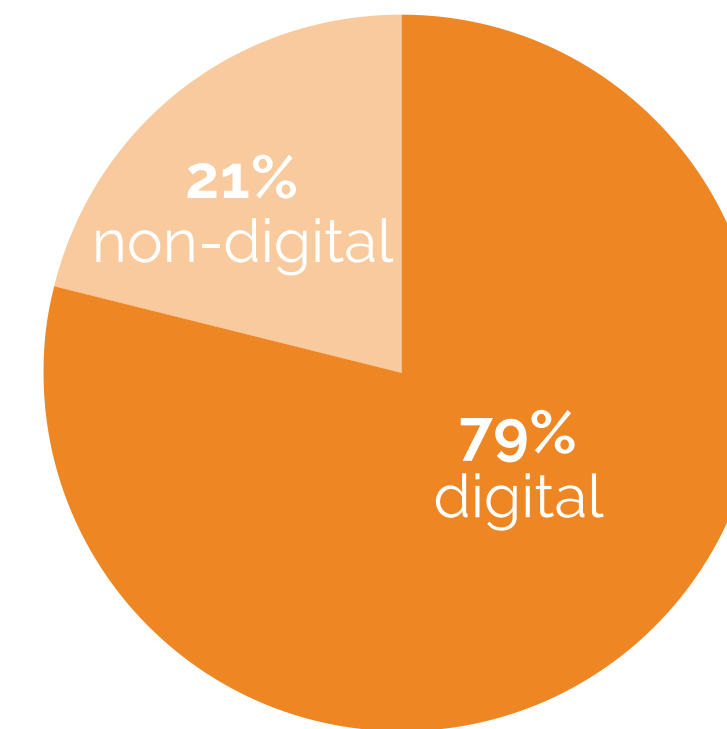
2015



2020



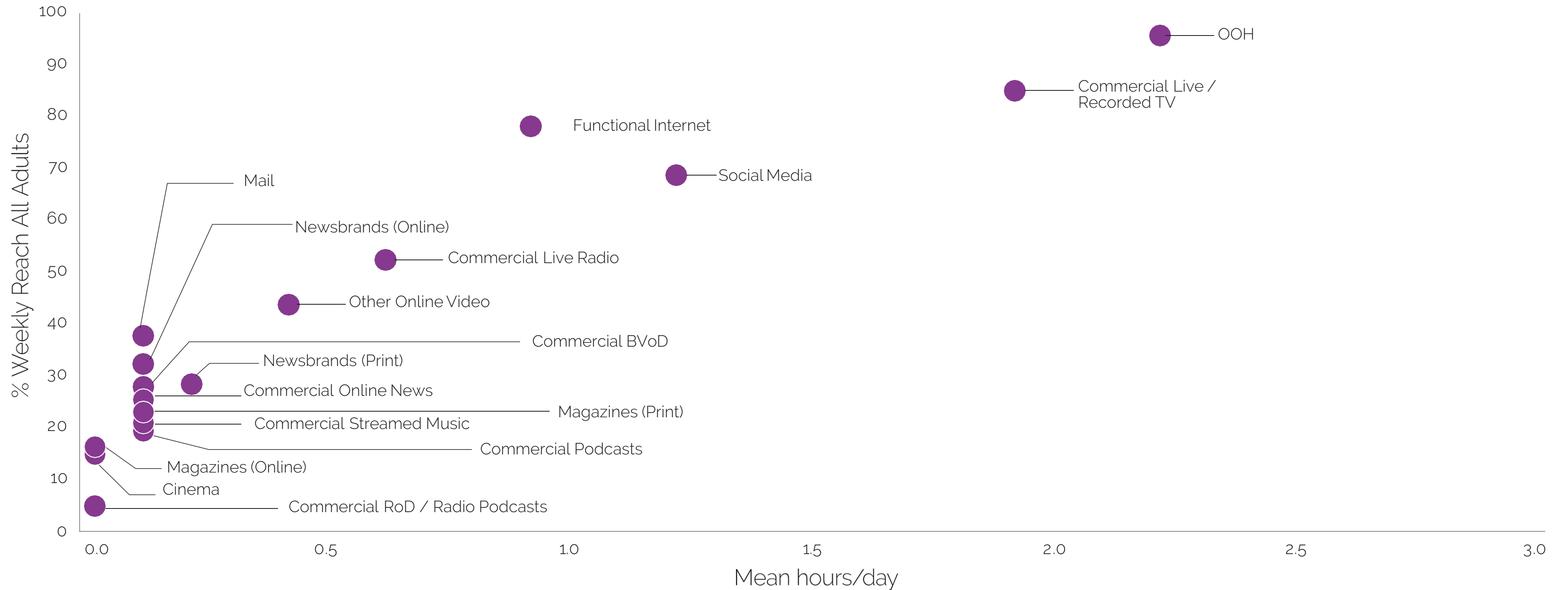
Lockdown



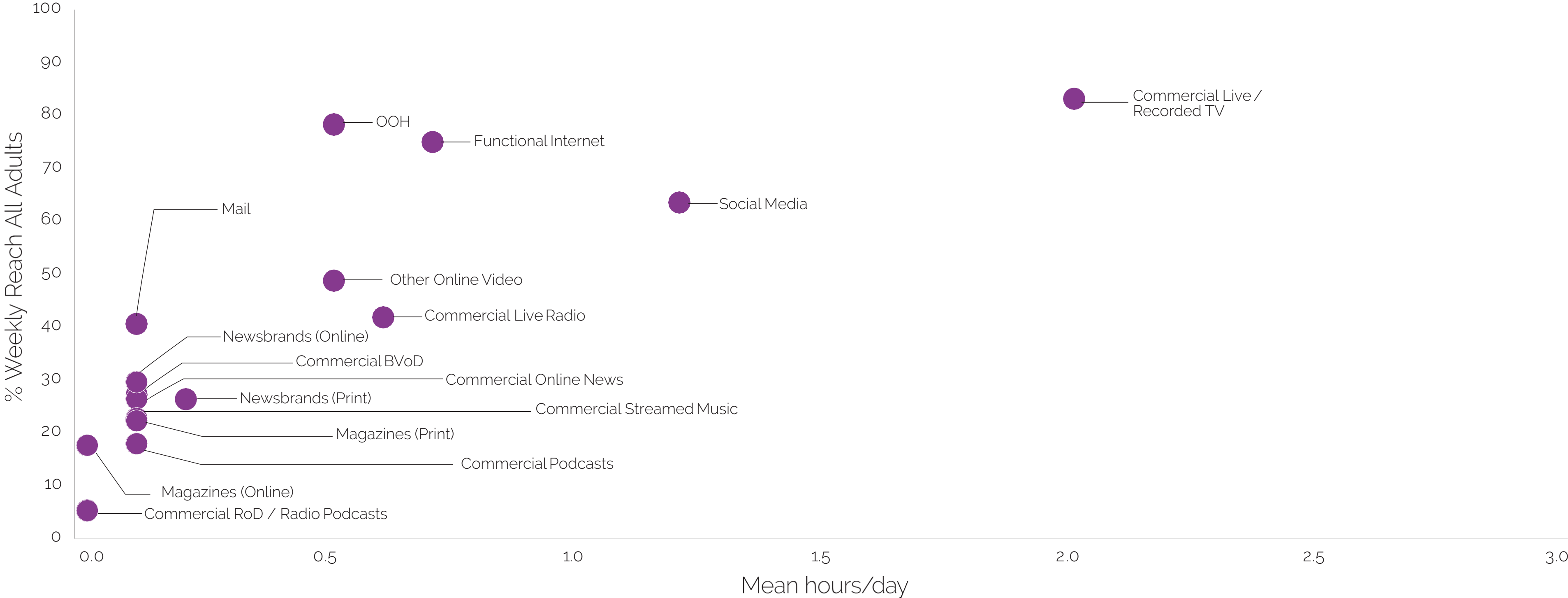
Lockdown

All adults

All Adults: The commercial media landscape in 2020 broken down by buyable media types



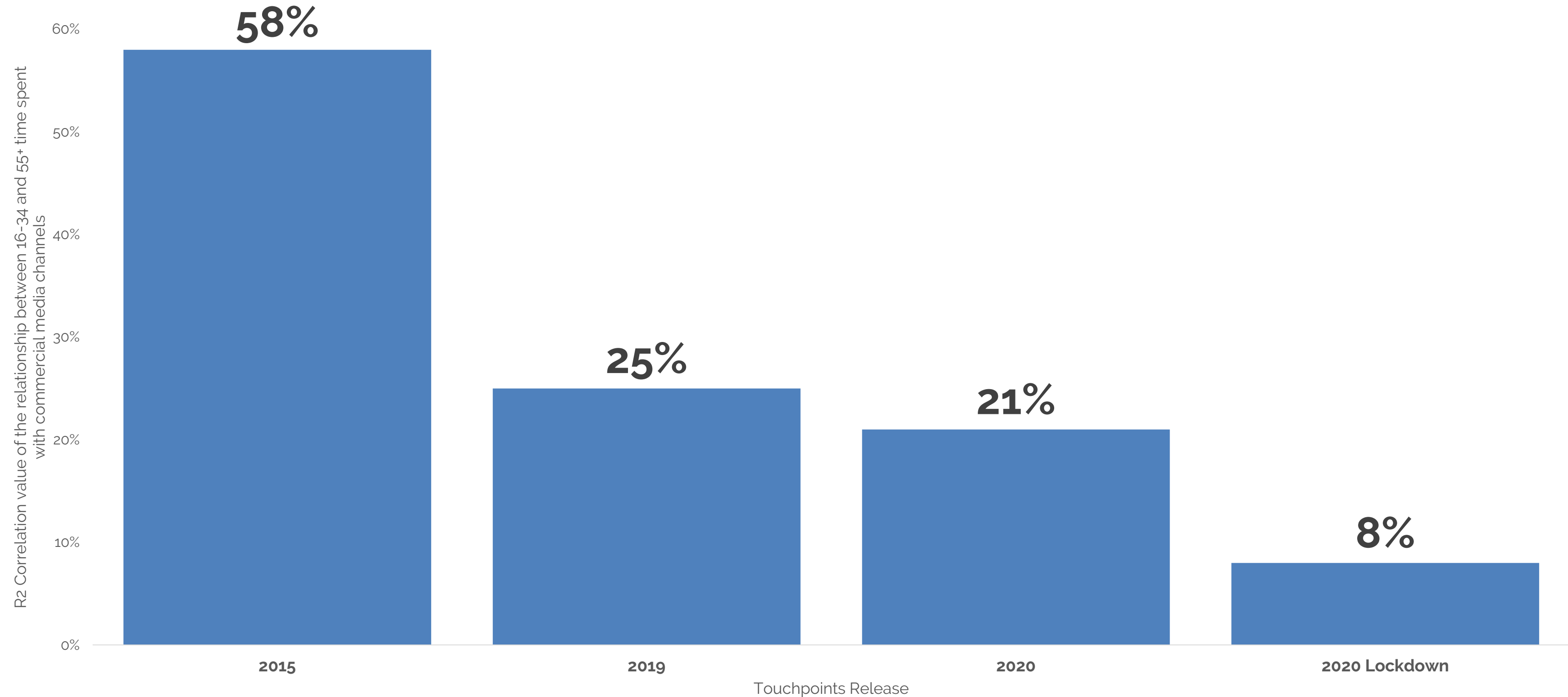
All Adults LD: The commercial media landscape in 2020 lockdown broken down by buyable media types



Source: TouchPoints 2020 – All Adults: The weekly reach and mean hours/day spent with commercial media channels during lockdown

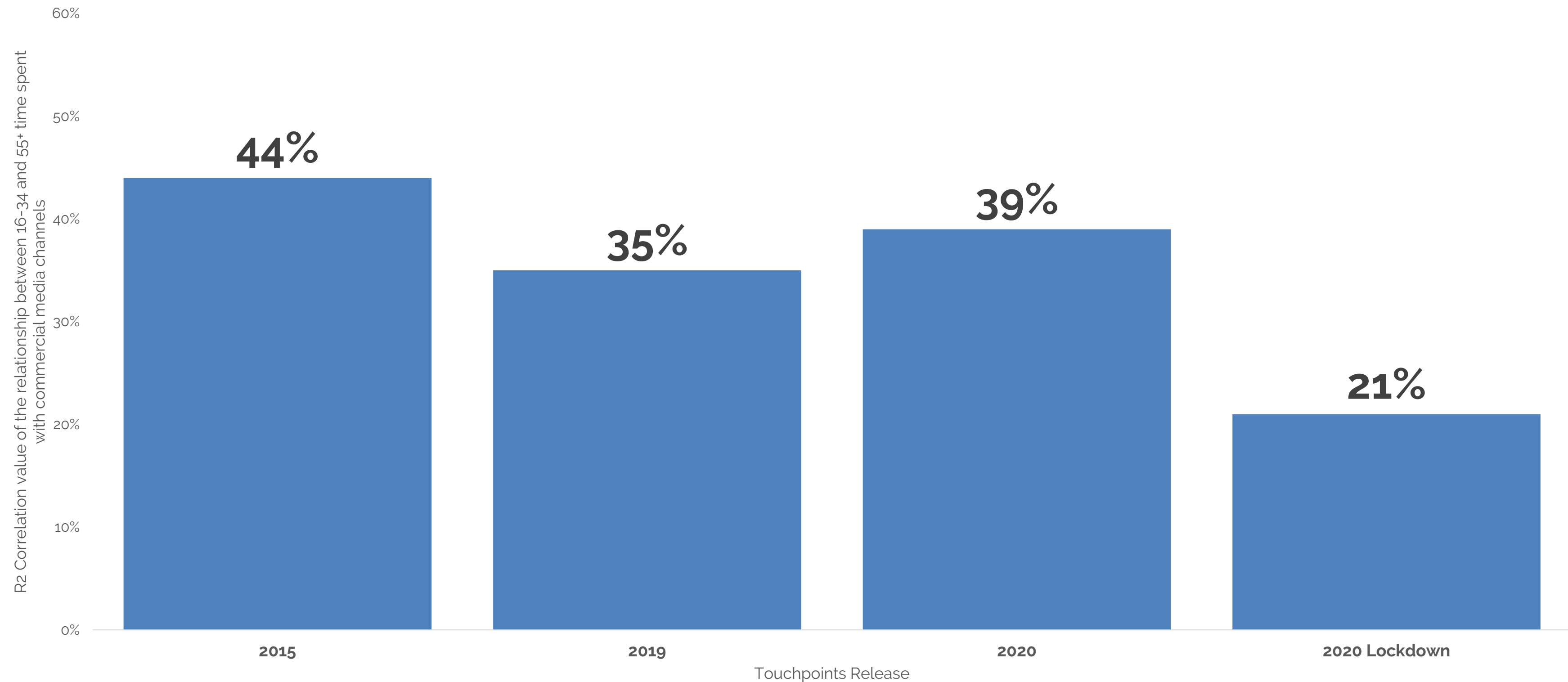
Media
behaviours
diversifying
across age
groups

16-34 and 55+ are more different than ever in the time they spend with commercial media channels



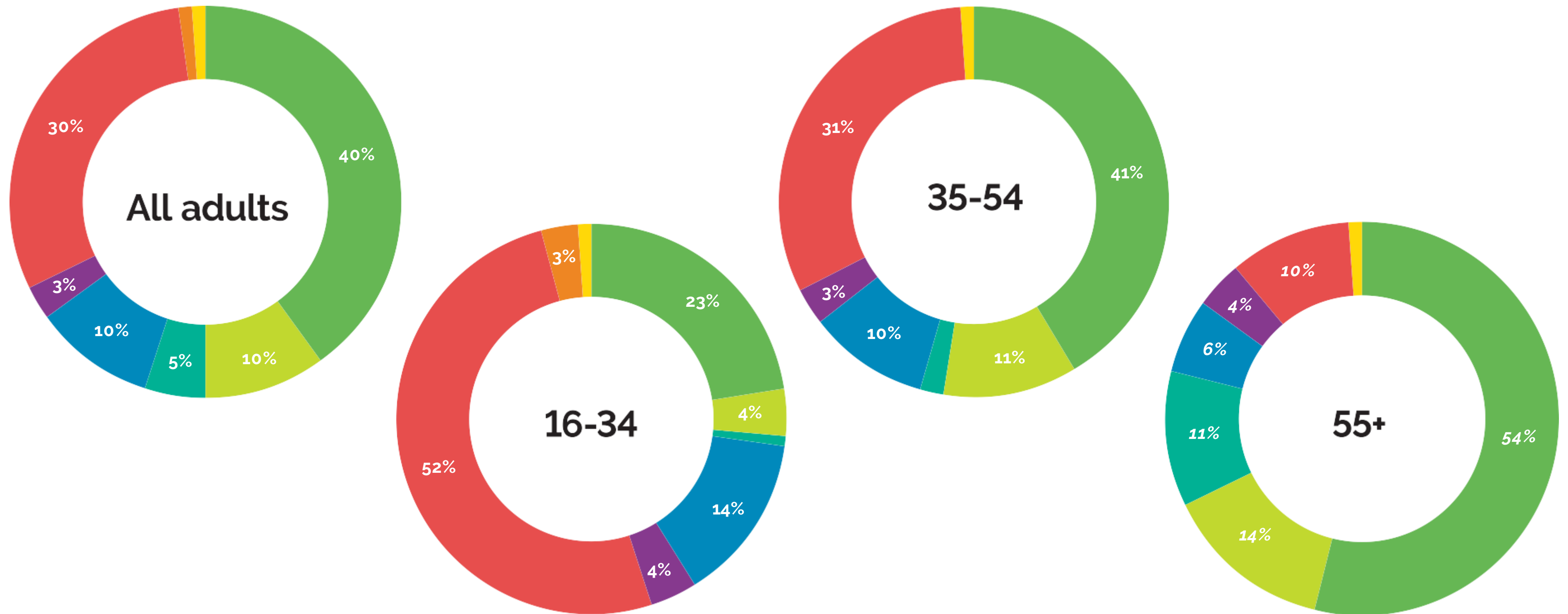
Source: IPA TouchPoints - The correlation between the time spent with commercial media channels for 16-34s and 55+

16-34 and 55+ are more different than ever in the reach of commercial media channels



Source: IPA TouchPoints - The correlation between the reach of commercial media channels for 16-34s and 55+

Device usage under lockdown – 16-34 and 55+ couldn't be more different in how they consume media



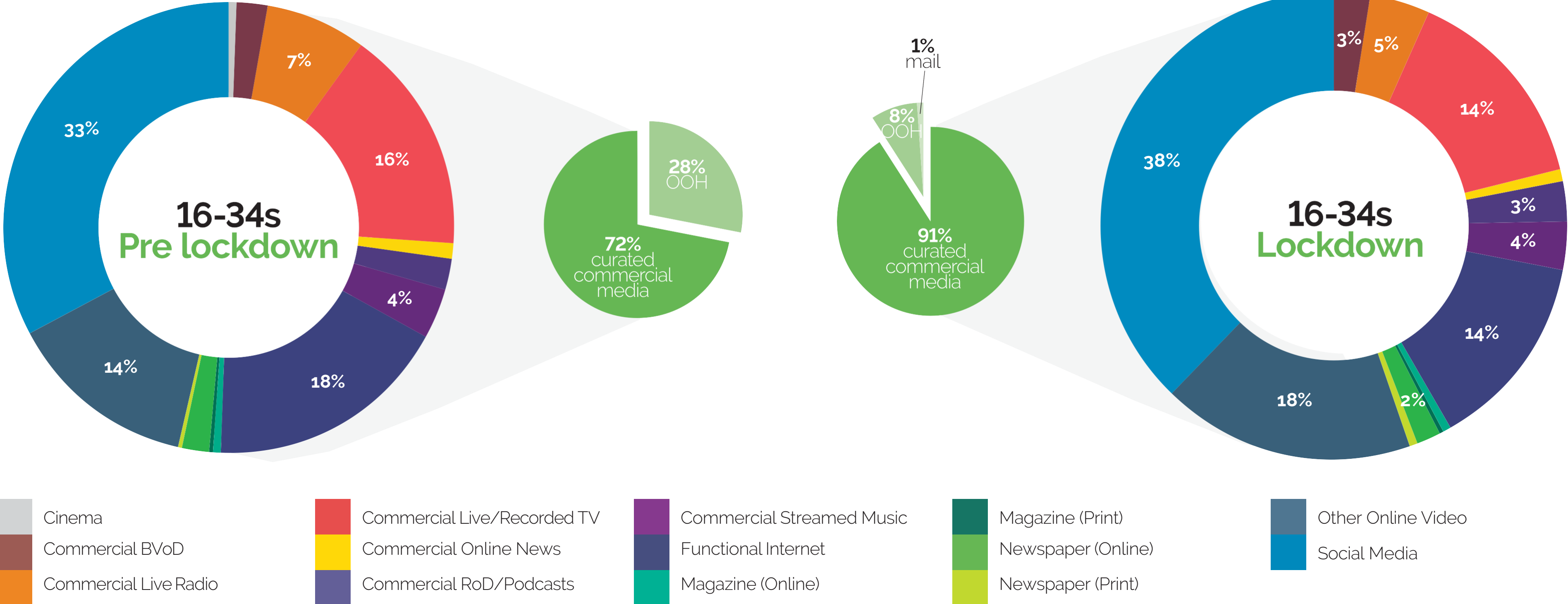
Source: TouchPoints 2020LD – The share of commercial media time by device

16-34

Significant

shifts

16-34: In lockdown, other online video overtook commercial live/recorded TV for the first time ever and time on social increased

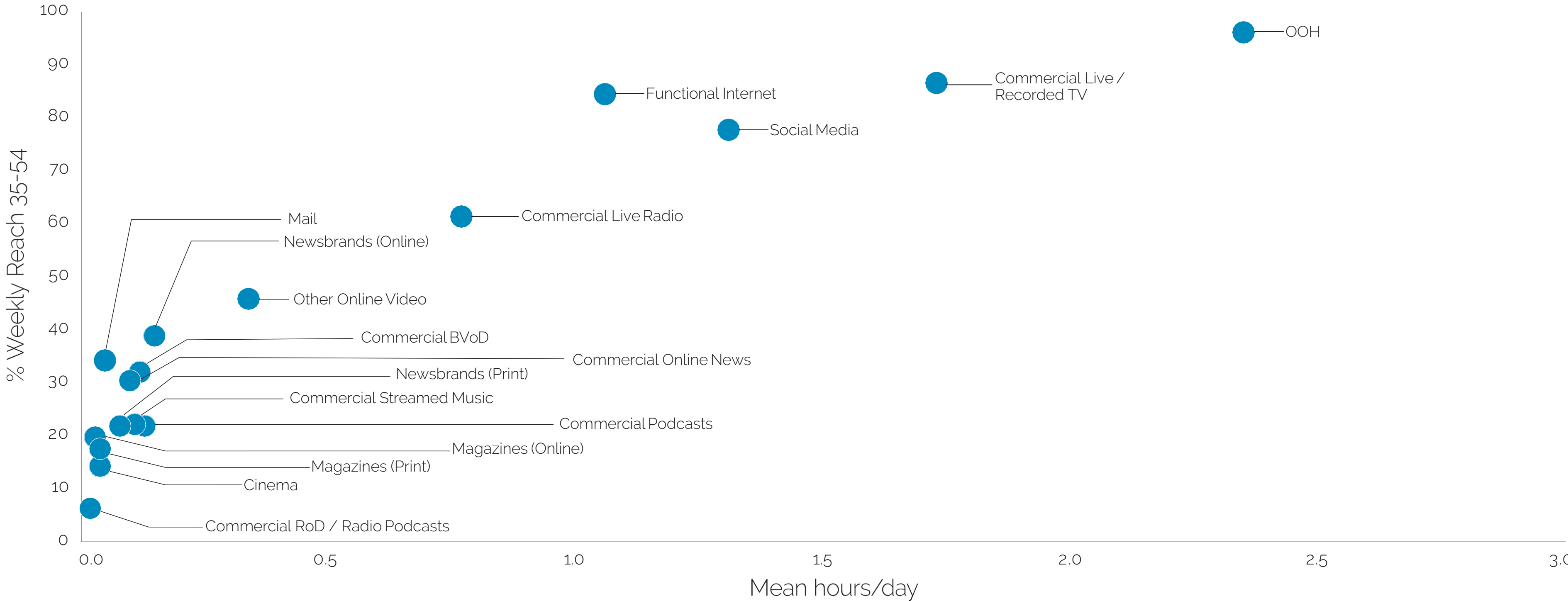


Source: IPA TouchPoints 2020 Weekly total share of time spent with commercial media for 16-34s in GB, broken down by media types

35-54

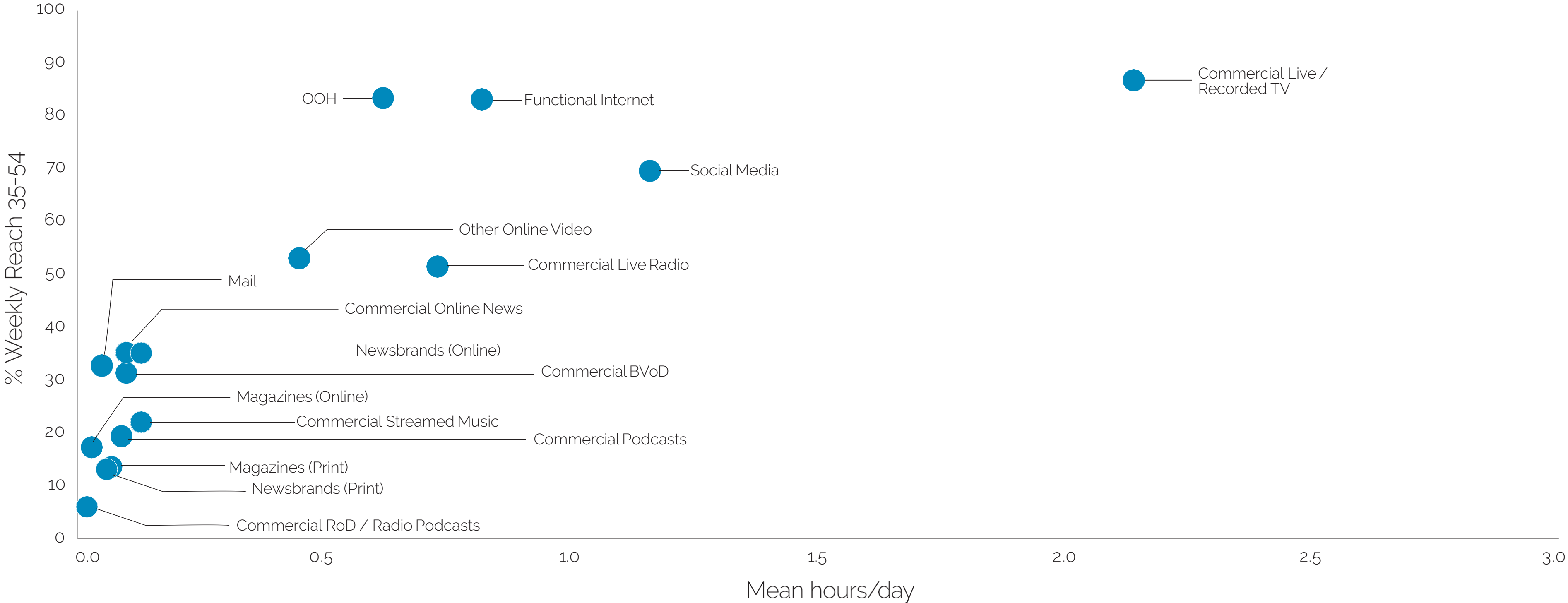
Some shifts but
a similar shape

35-54: Pre-lockdown the top right position was a hotly contested space



Source: TouchPoints 2020 - 35-54: The weekly reach and mean hours/day spent with commercial media channels

35-54: But as lockdown took hold, the status adjusted

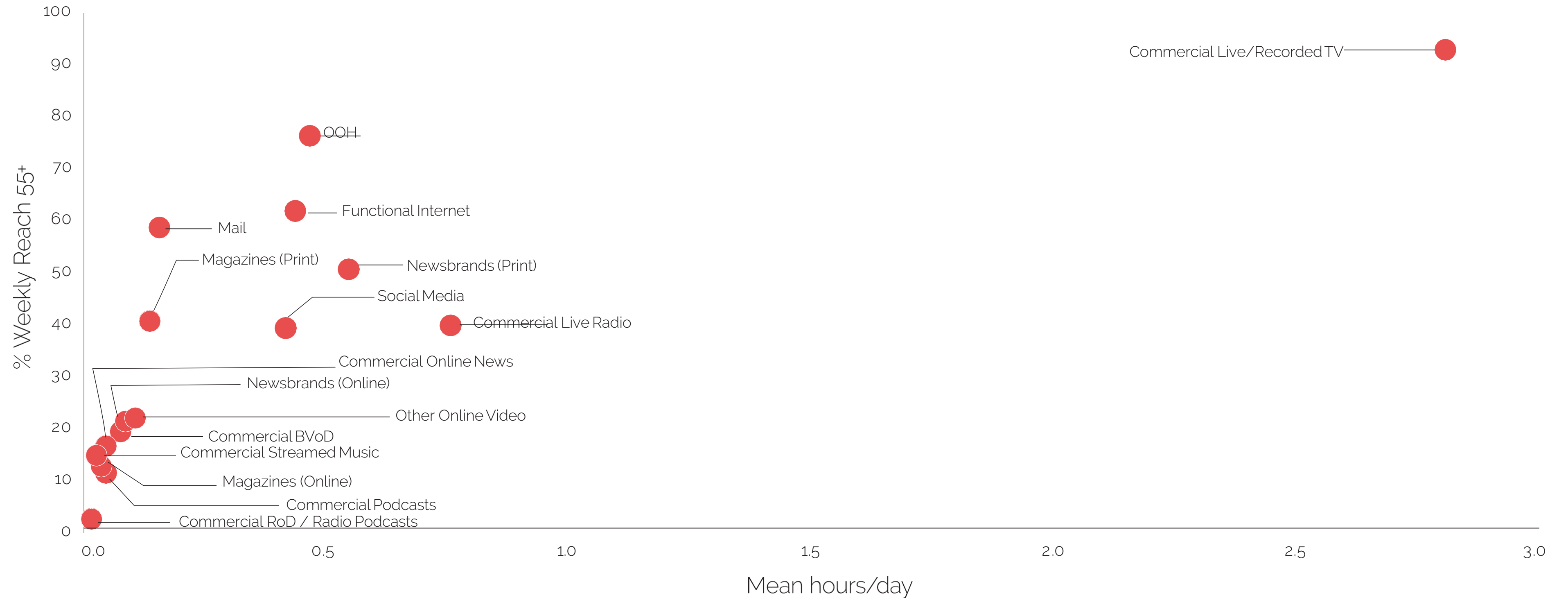


Source: TouchPoints 2020 – 35-54: The weekly reach and mean hours/day spent with commercial media channels under lockdown

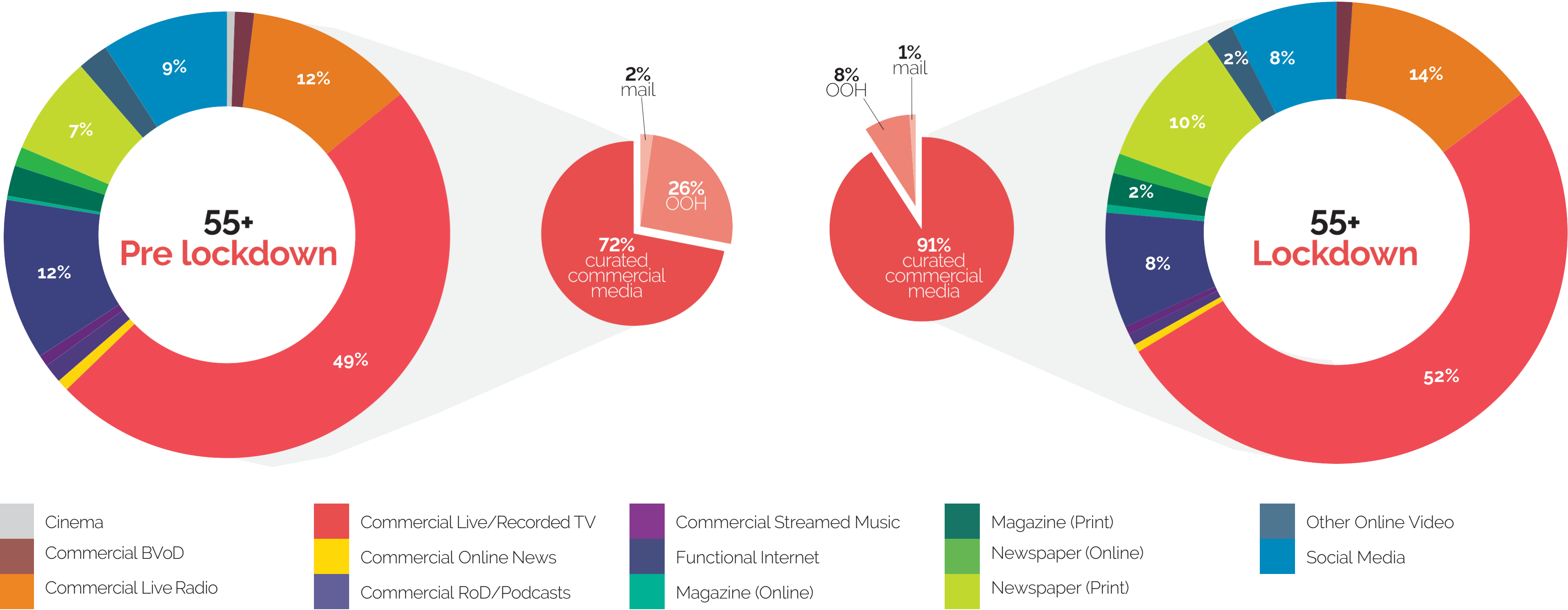
55+

Slow evolution

For 55+ the lockdown further entrenched dominant positions and roles for commercial media channels



55+ under lockdown almost represented a counter digital movement with declines in digital channel share and increases in non-digital channels



Source: IPA TouchPoints 2020 Weekly total share of time spent with commercial media for 55+ in GB, broken down by media types

In a nutshell

- There is no grand narrative in commercial media consumption changes – a greater focus on diverse media plans is key for building effective campaigns
- Similarities between 16-34 and 55+ commercial media time have gone from 58% to just 8% in 5 years
- Think device first, and this is true for all age groups – how will your audience see your message
- The digital landscape is evolving with online video rapidly growing, social stabilising and functional internet mixed depending upon age group
- This is only the beginning - The full report will be launched in Q1 2021

Thank you



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