

Sept 2022

TV in Focus



Agenda

VIEWING

SPENDING

PRICING

PLANNING



House of the Dragon, Sky Atlantic

SECTION ONE

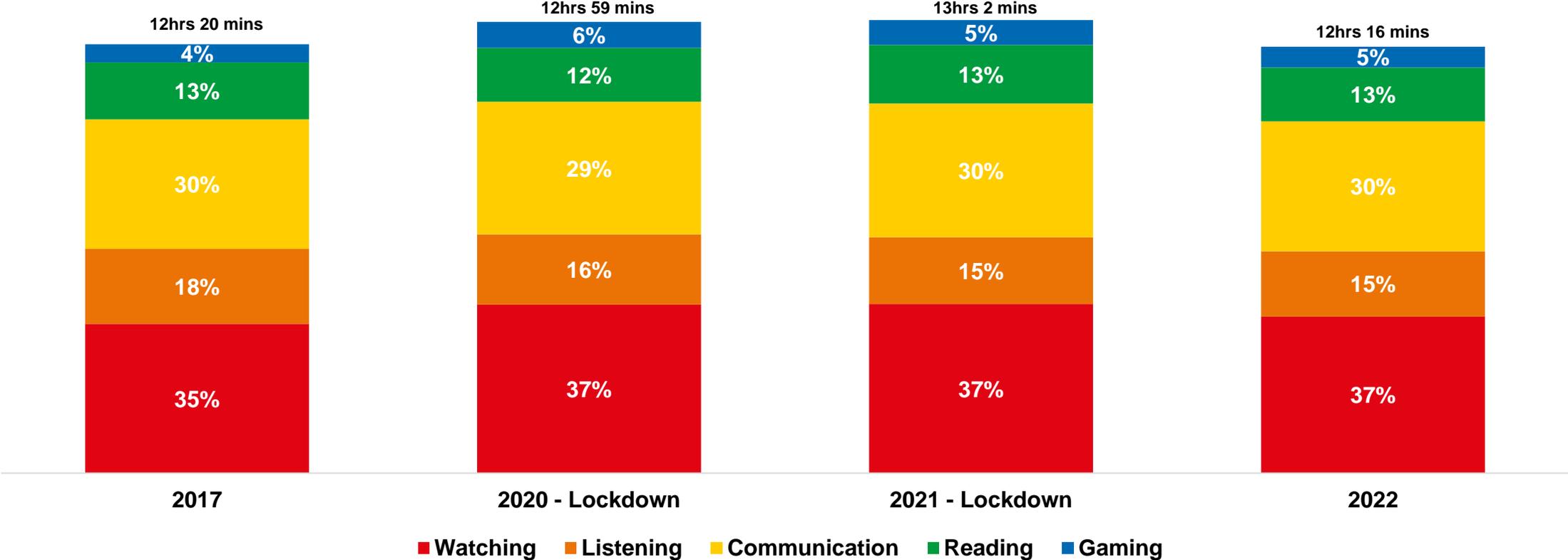
Viewing



Sky Sports "Only Live Once"

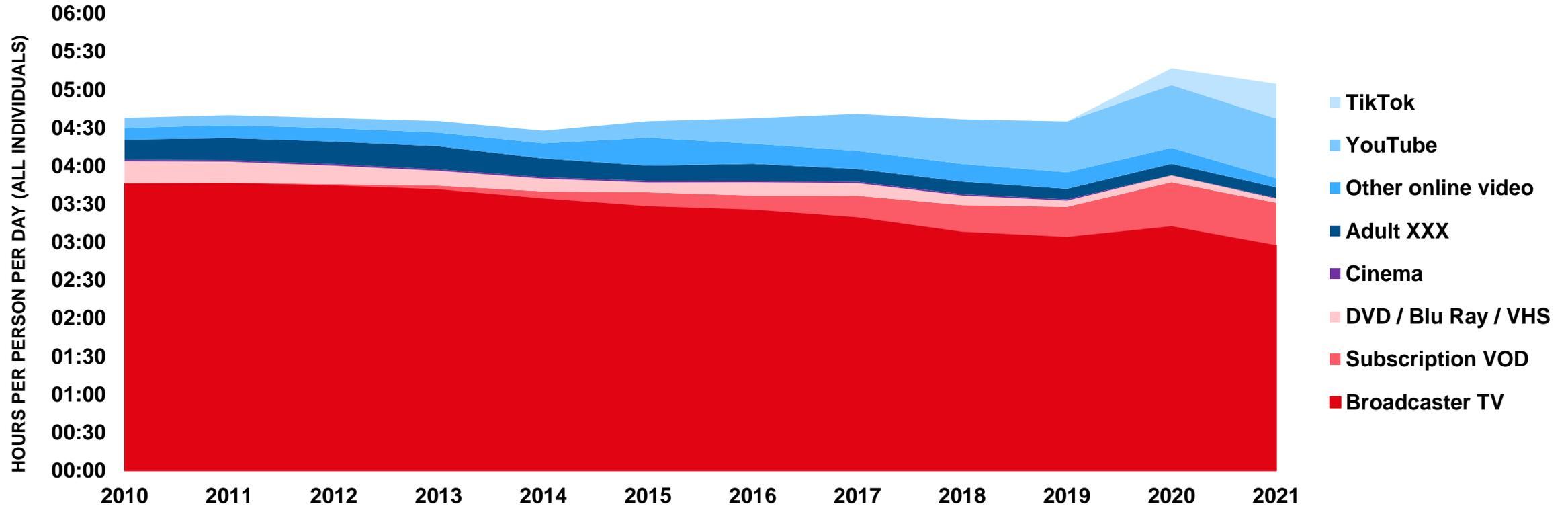
Back to normal?

DAILY MINUTES WITH MEDIA, ADULTS



Source: IPA TouchPoints

'Watching' is fragmenting

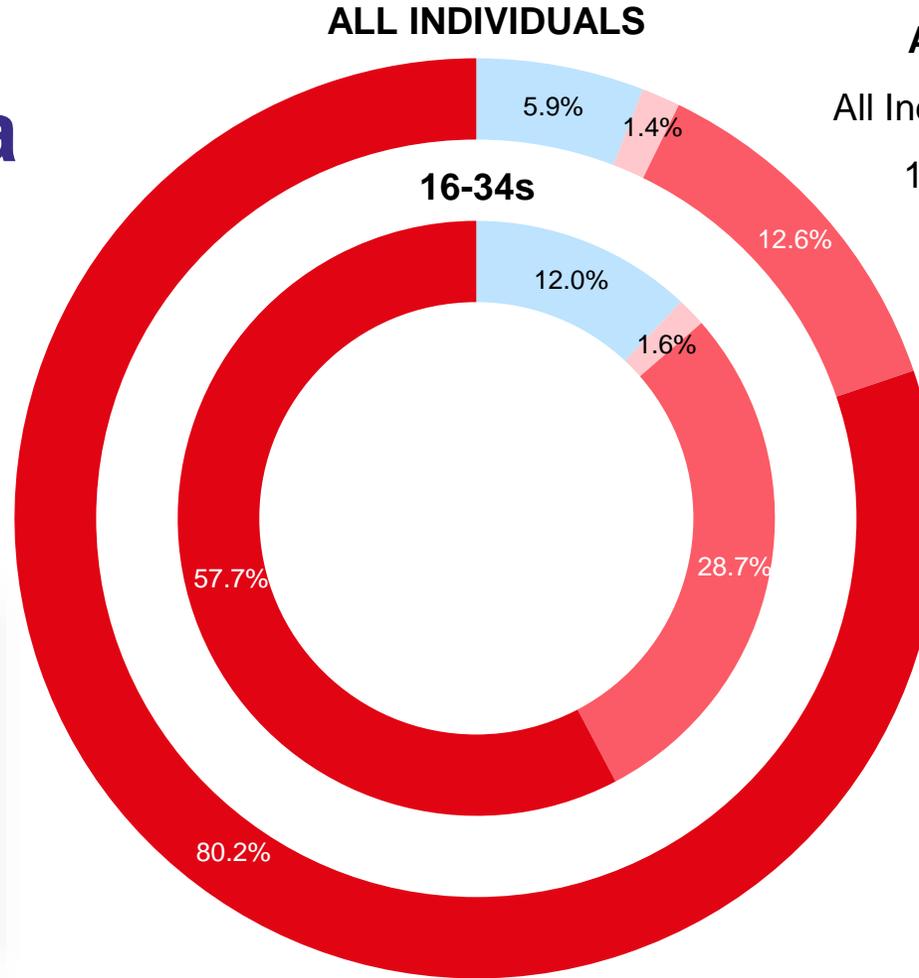


Source: 2010-2021, BARB / Broadcaster stream data / IPA Touchpoints 2021, Pornhub / Rentrak, Individuals

Two video battles have emerged, within two competitive arenas



The TV set is the competitive arena for high-quality AV content



Average video time per day (TV set)

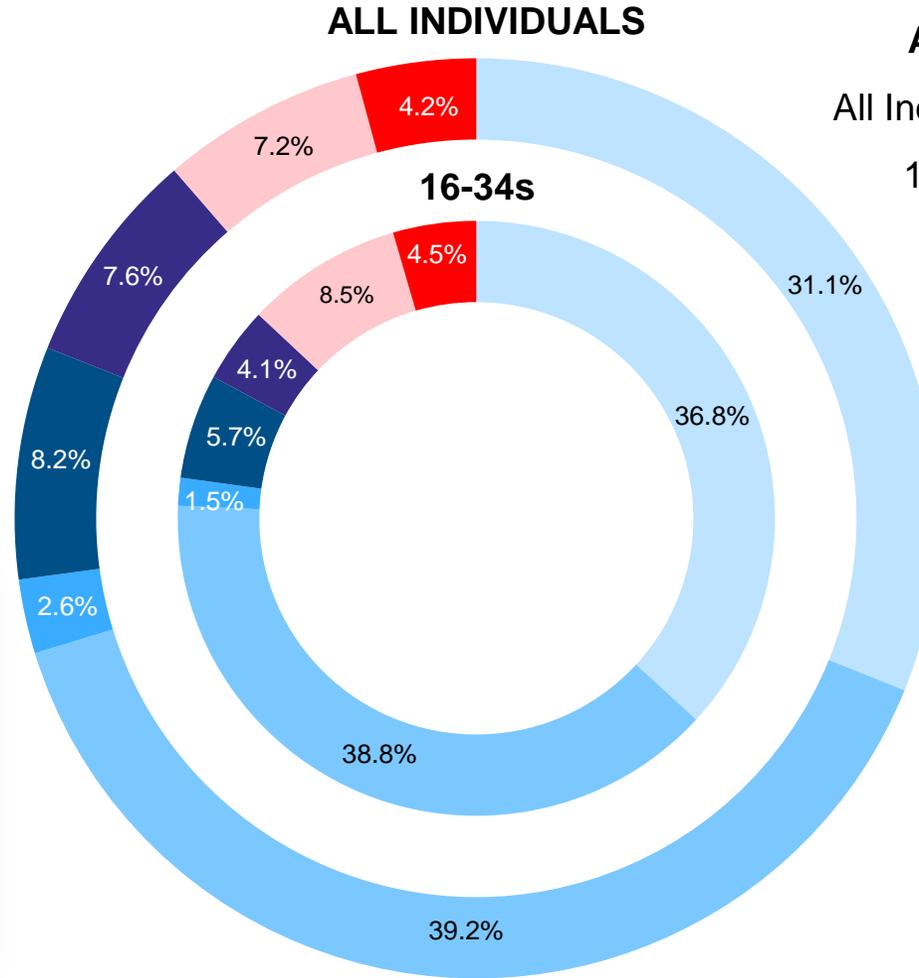
All Individuals: 3hrs, 36 mins (71% total video day)

16-34s: 2hrs, 14 mins (47% total video day)

- YouTube
- DVD
- Subscription VOD
- Broadcaster TV

Source: 2021, BARB / Broadcaster stream data / comScore / IPA Touchpoints 2021

Devices are the competitive arena for social video



Average video time per day (Device)

All Individuals: 1hr, 26 mins (29% total video day)

16-34s: 2hrs, 27 mins (53% total video day)

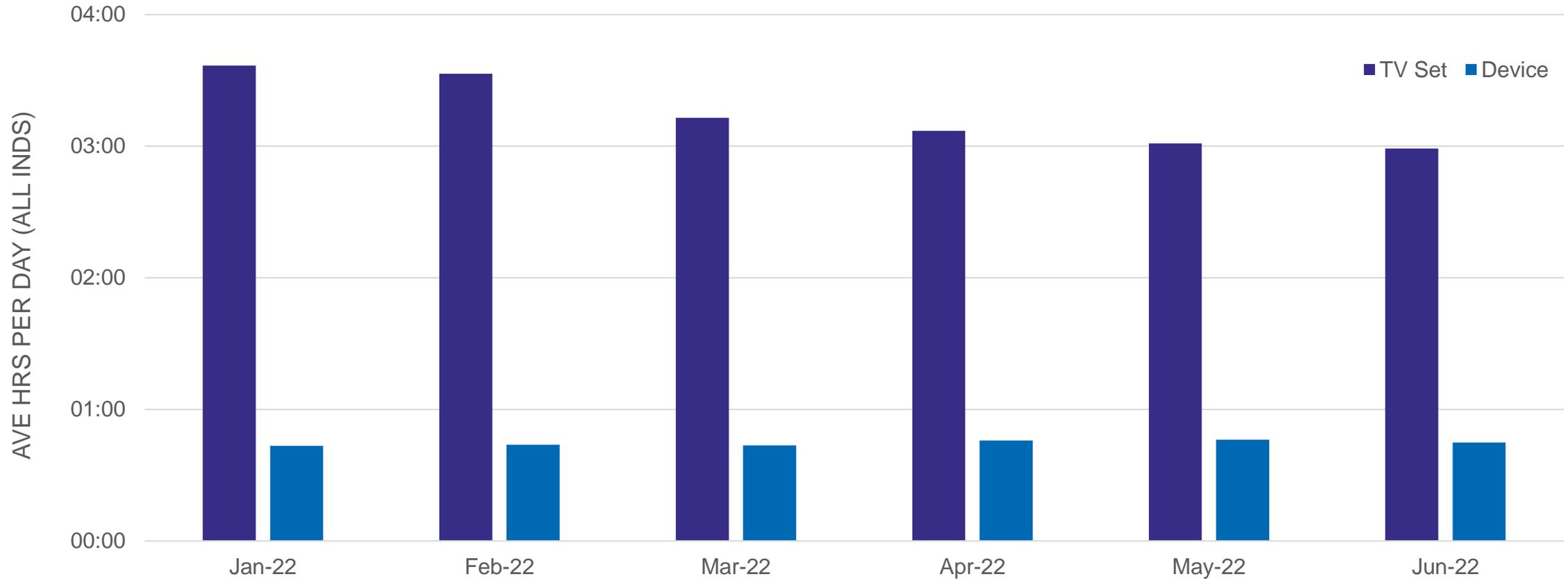
- TikTok
- YouTube
- Facebook
- Other Online Video
- Adult XXX
- Subscription VOD
- Broadcaster TV

Source: 2021, BARB / Broadcaster stream data / comScore / IPA Touchpoints 2021

What the new BARB focal meter data tells us

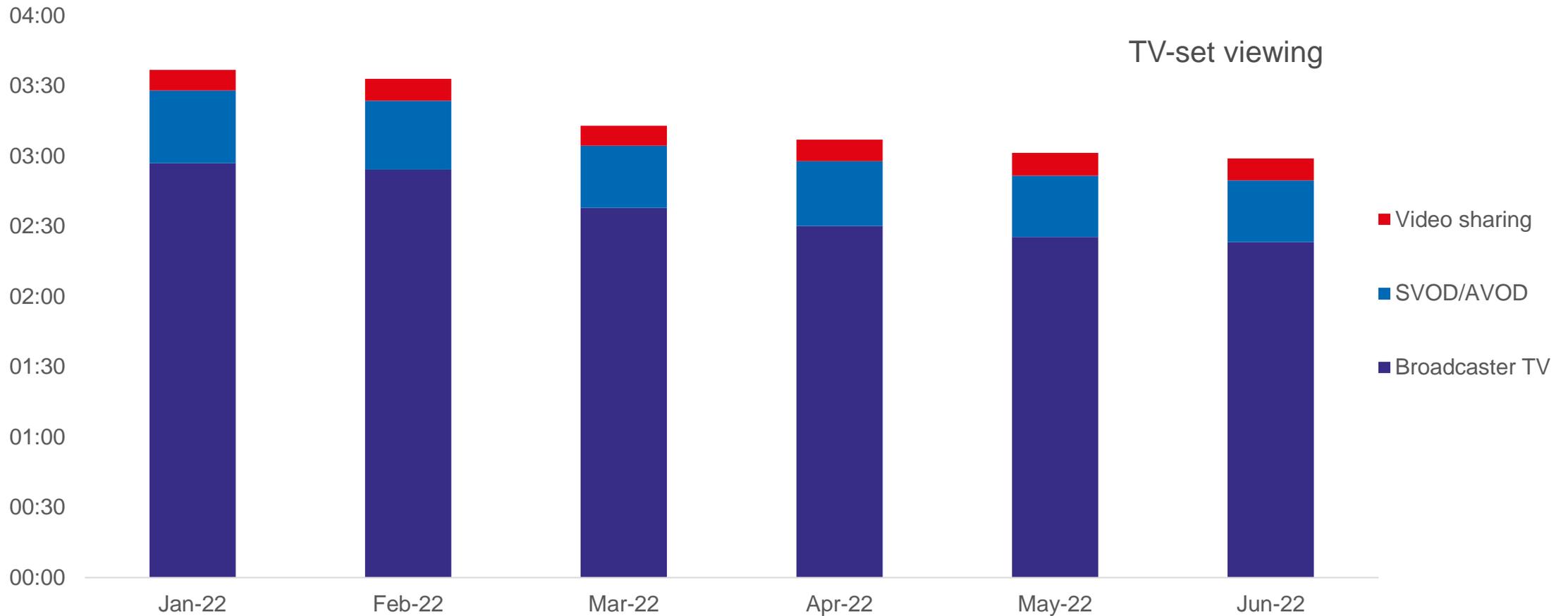


TV set video viewing is seasonal, device viewing is not



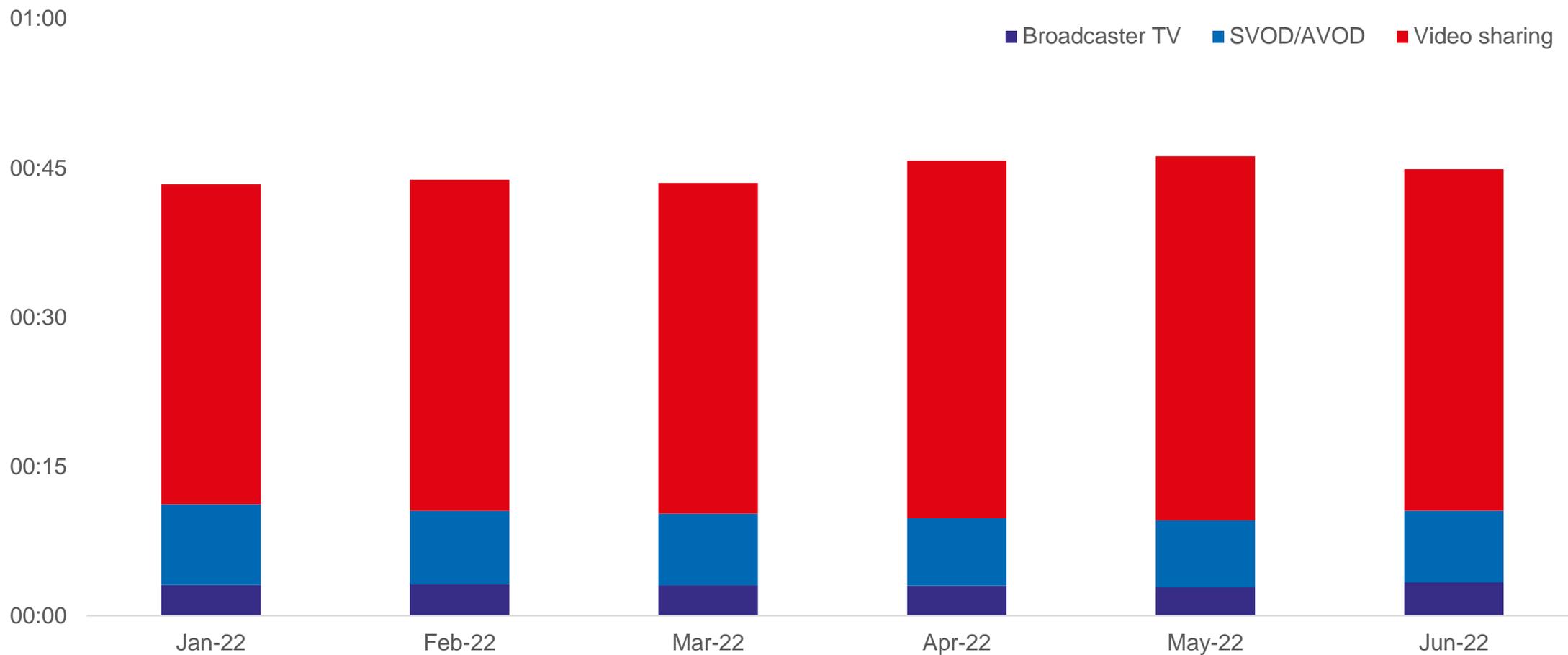
Source: BARB, in-home video viewing

TV set viewing share by video type is very stable



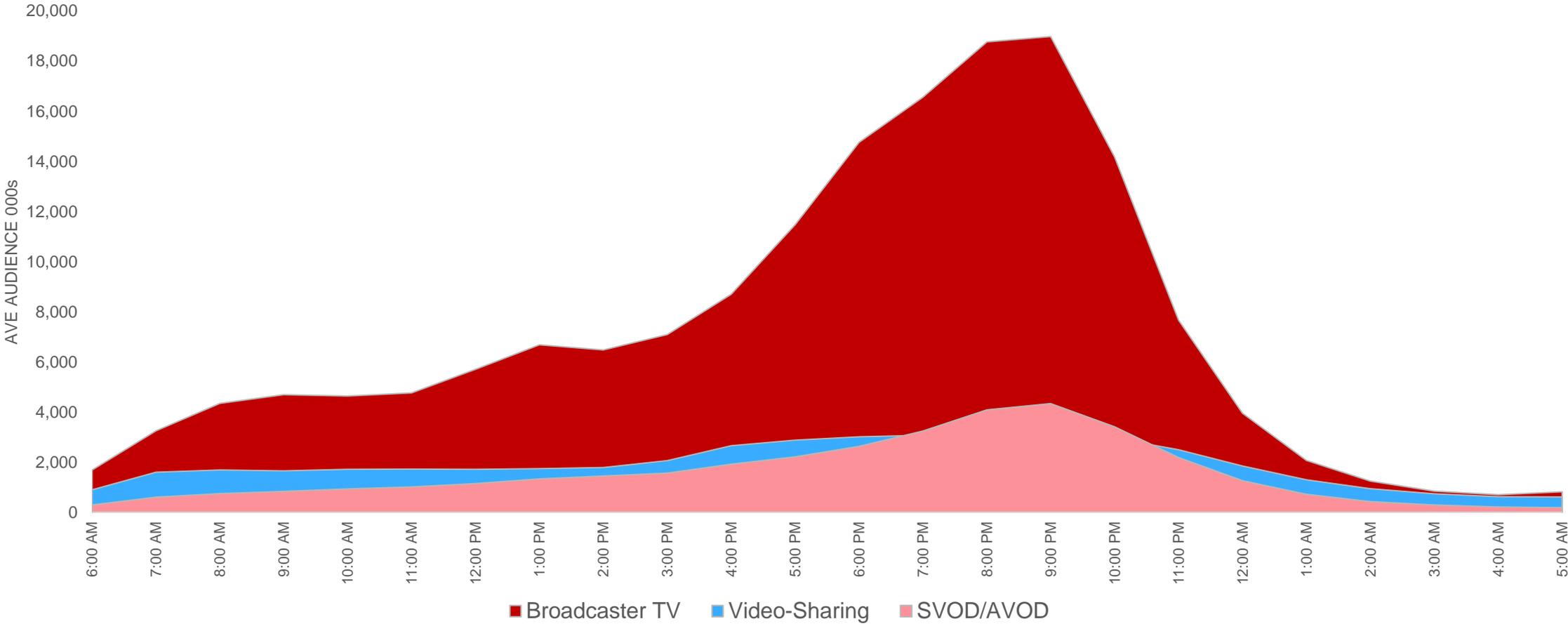
Source: BARB, in-home video viewing, TV set

On devices, video sharing has slightly grown across the year



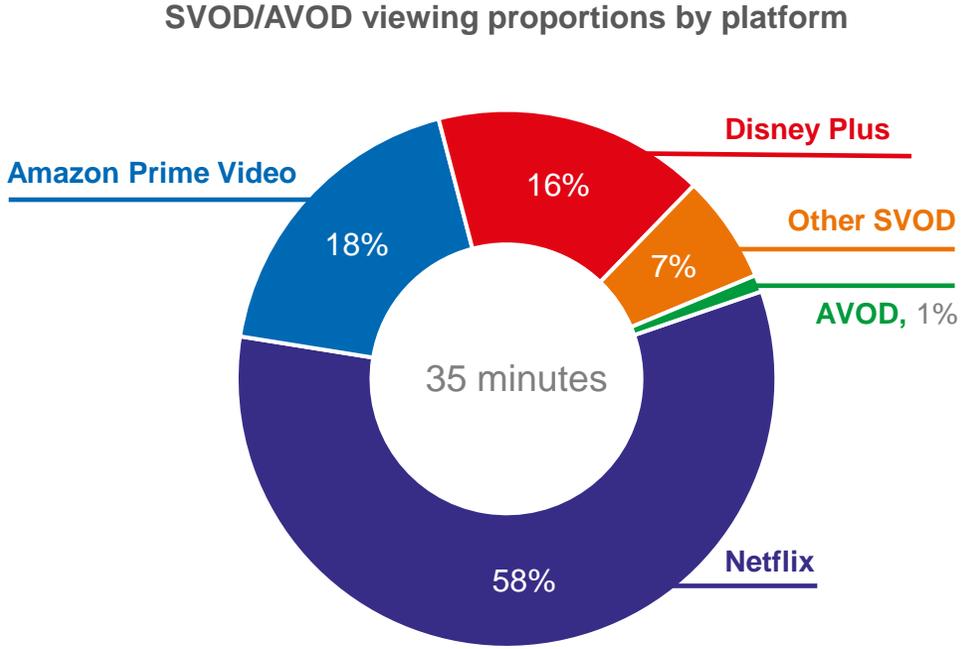
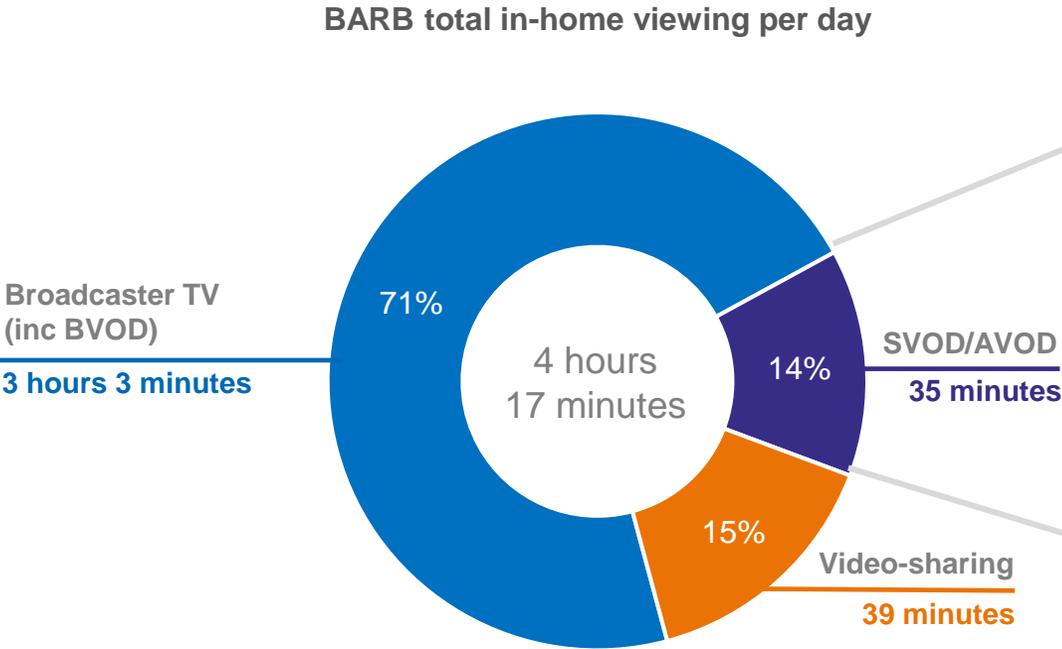
Source: BARB, in-home video viewing, device

Viewing by time of day varies by video type



Source: BARB – All devices, Jan to June 2022

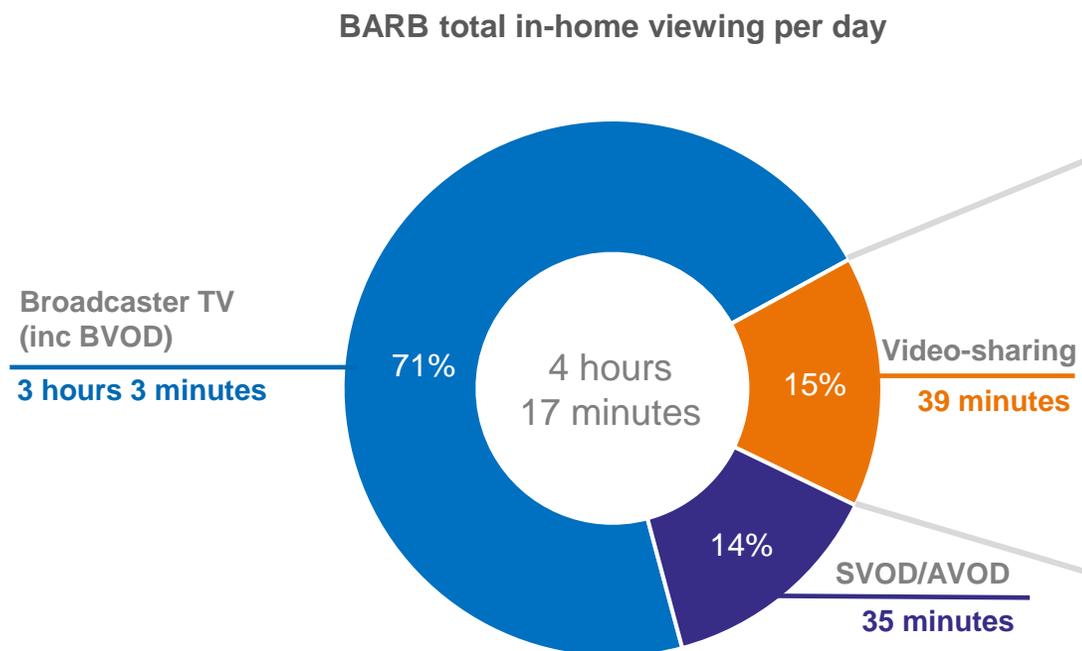
Netflix continues to dominate SVOD/AVOD viewing time



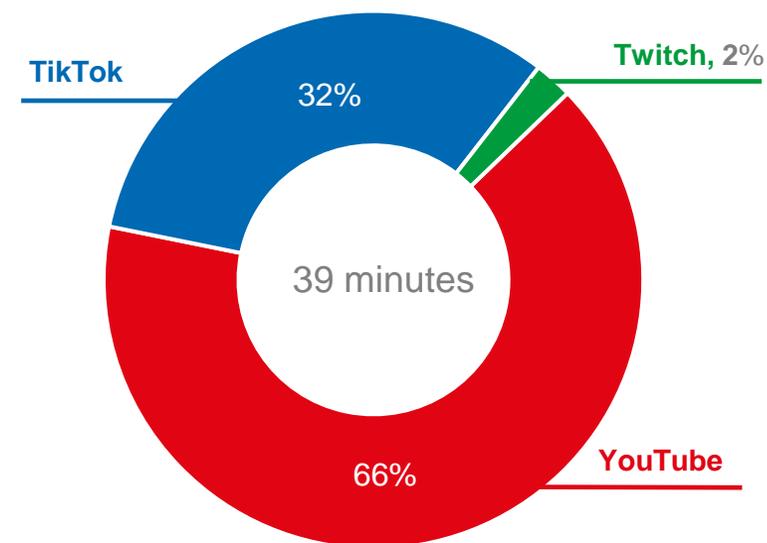
Source: Total viewing time = BARB, Platform splits = IPA TouchPoints 2022 Wave 1

Source: BARB Total identified viewing, Jan - Jun 22. Adults 16+. Online Multiple Screens Network - viewing across four screens – TV sets, tablets, PCs and smartphones
 IPA TouchPoints 2022 Wave 1, Adults 16+, share of gross half hour claims Mon - Sun, AVOD classified as 'Any Other Players/Catch-Up Watched For Free On-Demand' Content'

TikTok's share of video viewing has stabilised in 2022



Video-sharing viewing proportions by platform



Source: Total viewing time = BARB, Platform splits = IPA TouchPoints 2022 Wave 1

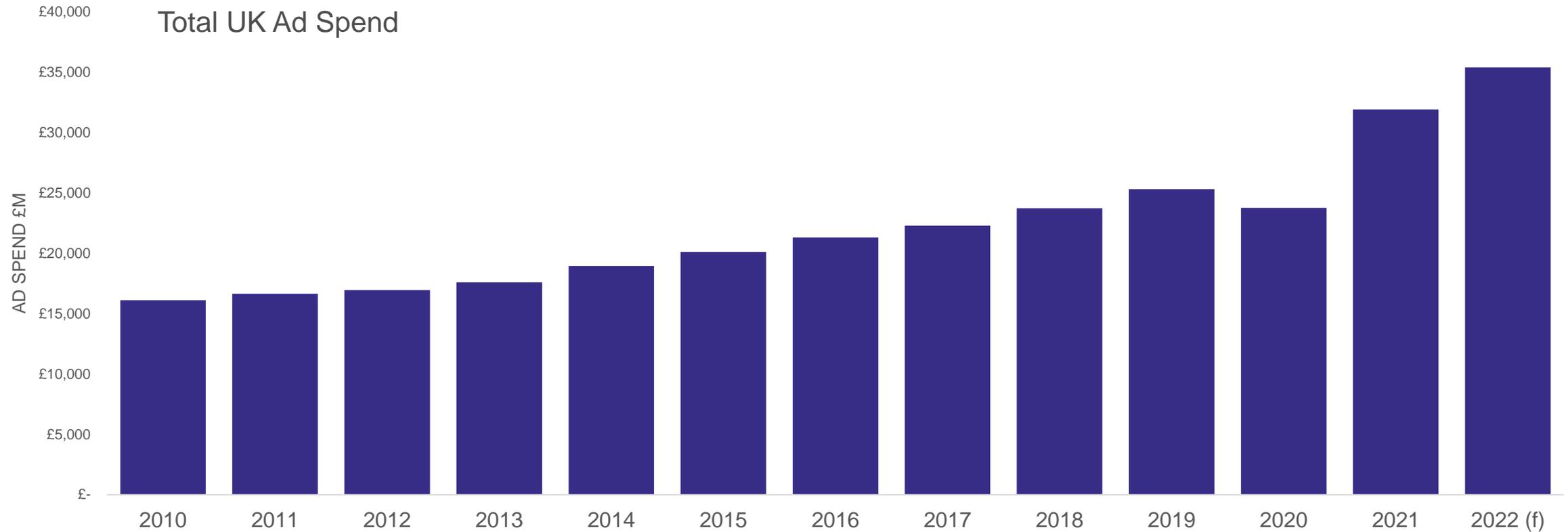
Source: BARB Total identified viewing, Jan - Jun 22. Adults 16+. Online Multiple Screens Network - viewing across four screens – TV sets, tablets, PCs and smartphones
IPA TouchPoints 2022 Wave 1, Adults 16+, share of gross half hour claims Mon - Sun

SECTION TWO

Spending

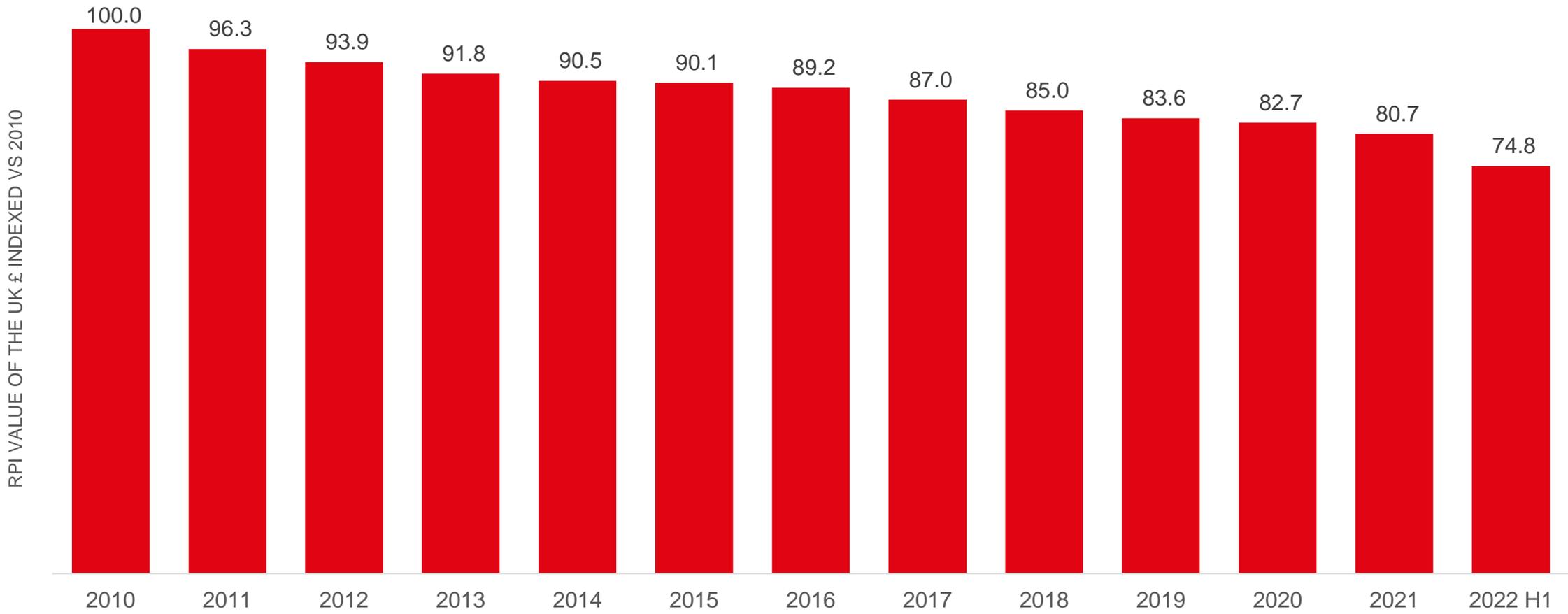


Ad spend has more than doubled in 10 years



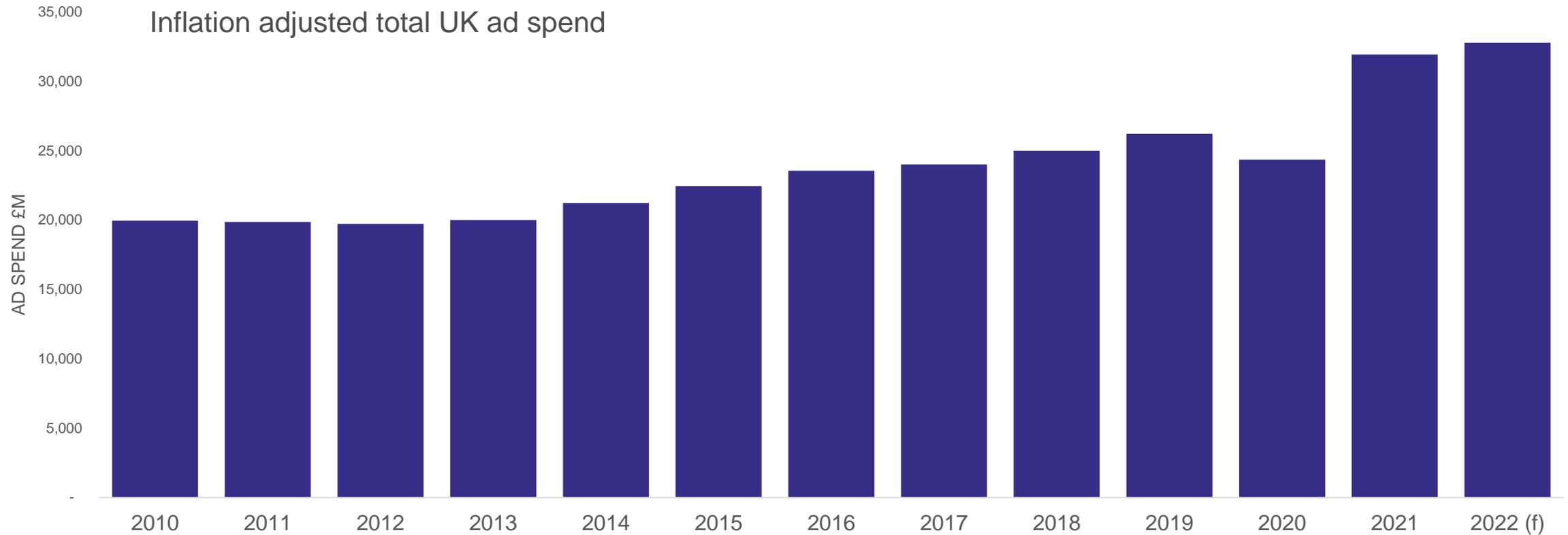
Source: AA/WARC / Current prices

But the pound is now worth 25% less than it was in 2010



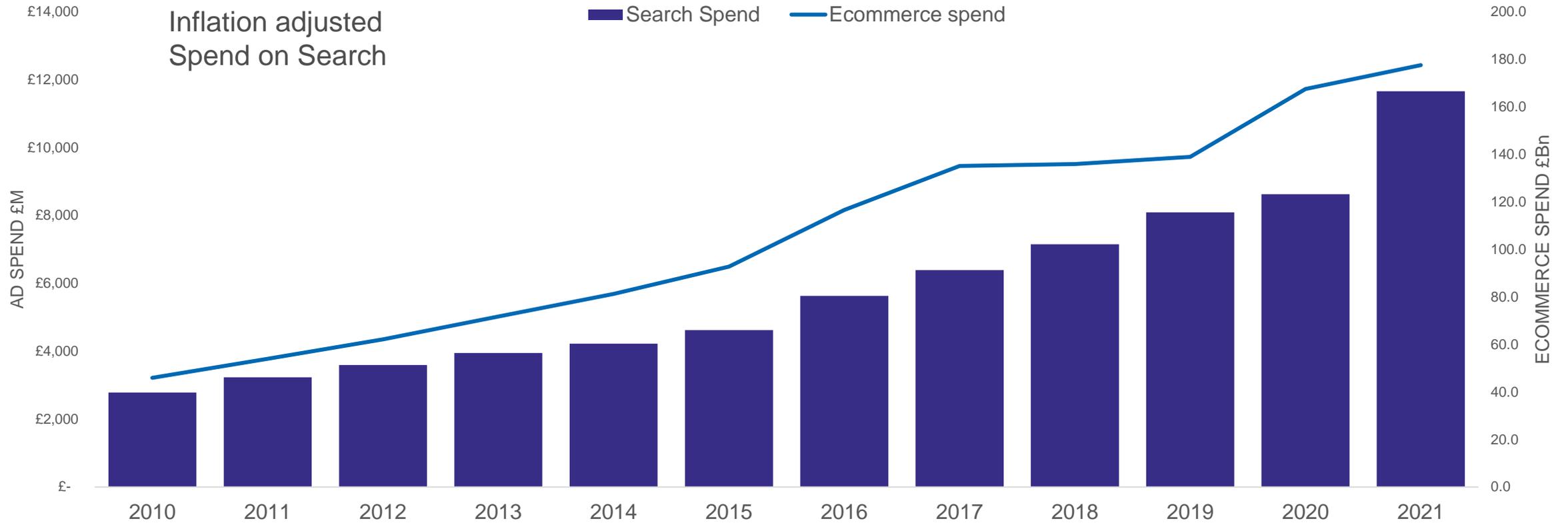
Source: ONS

In real terms, there is still strong growth...



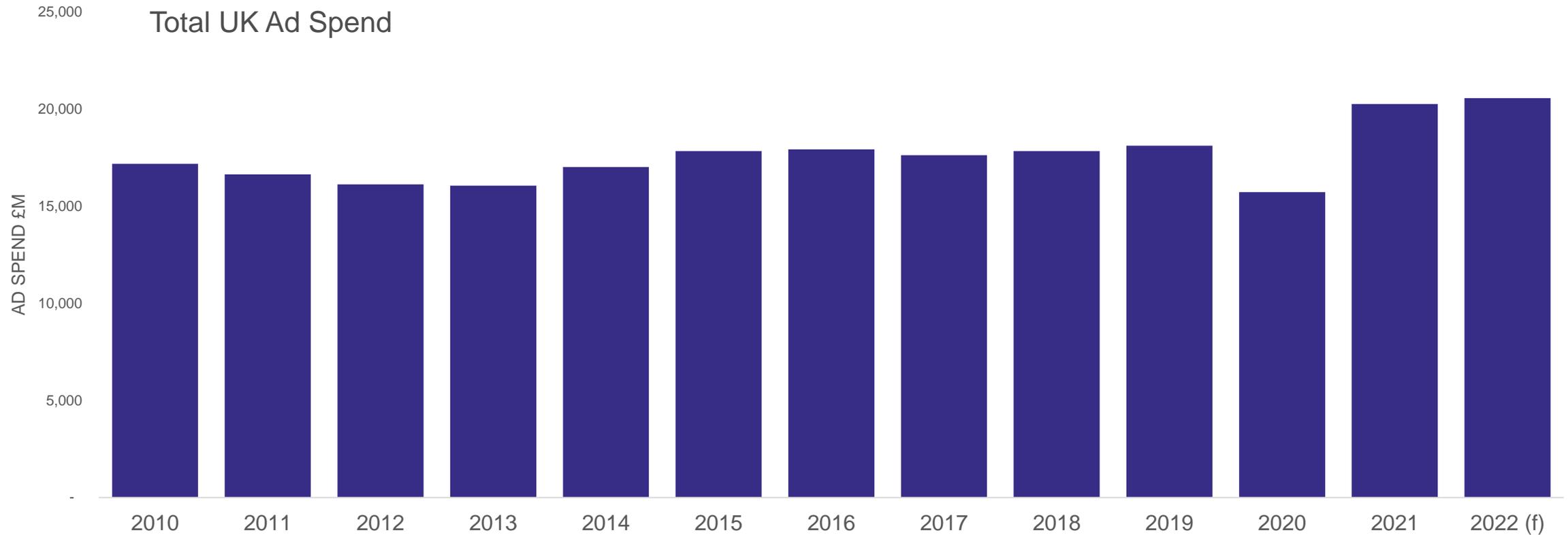
Source: AA/WARC / Constant prices (2021 base)

... but, this data is skewed by search



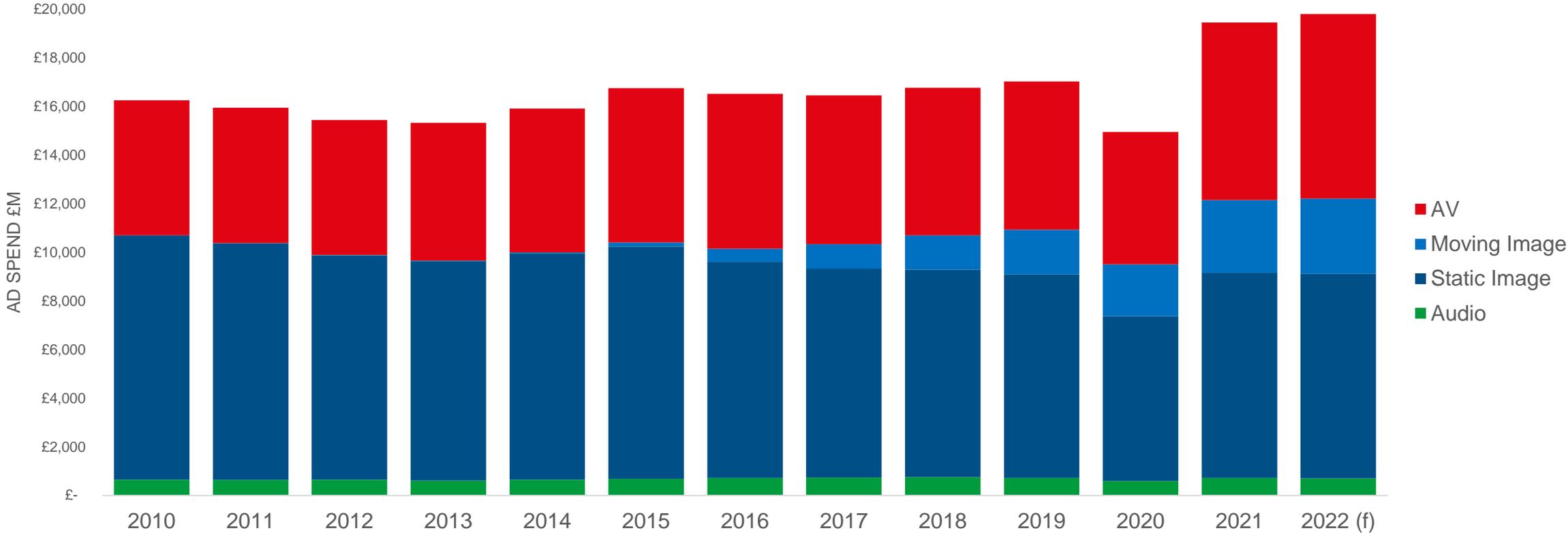
Source: AA/WARC / Constant prices (2021 base) / Ecommerce spend - Statista

If we exclude search, total ad spend is pretty consistent



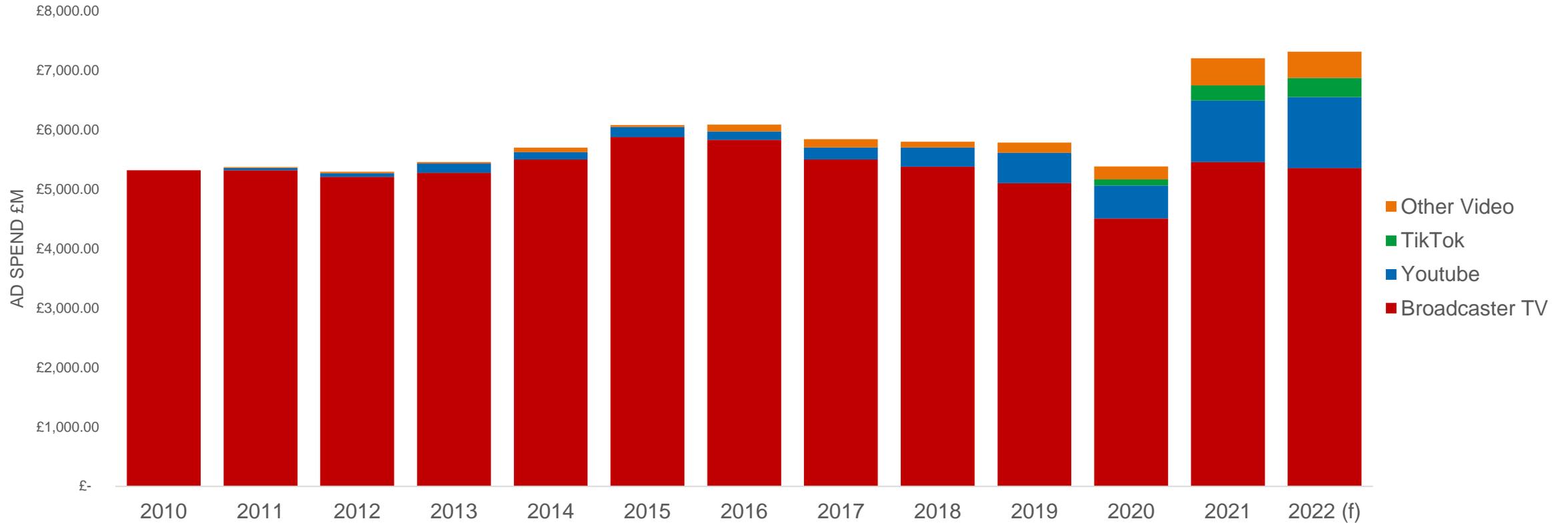
Source: AA/WARC / Constant prices (2021 base)

Video spend has spiked in the last two years



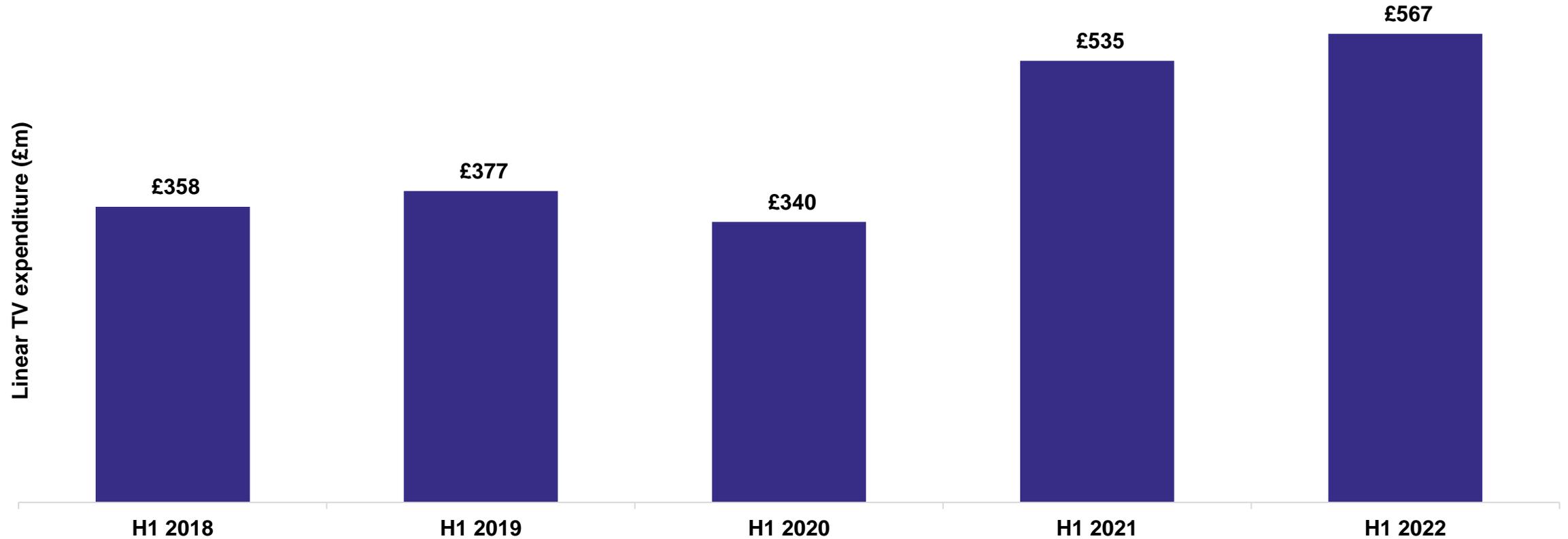
Source: AA/WARC / Constant prices / Thinkbox estimates (2021 base) excludes classified advertising

This is partly down to increased spend on YouTube & TikTok



Source: AA/WARC / Thinkbox estimates / Constant prices (2021 base)

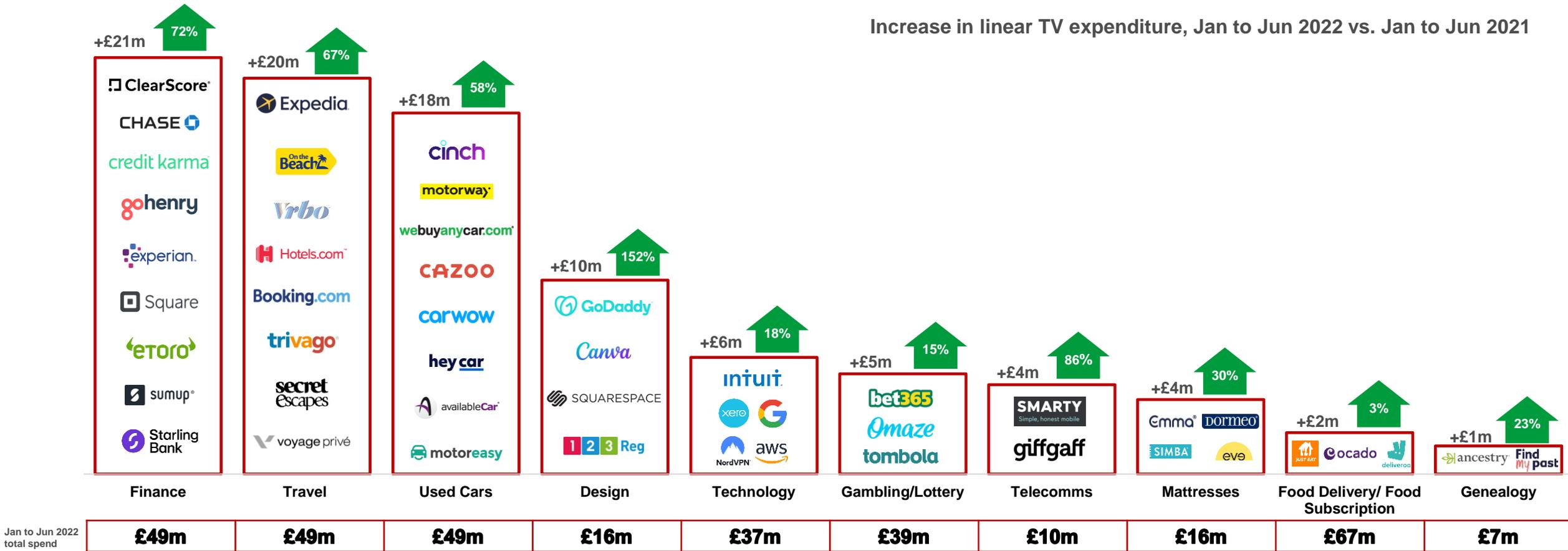
It's also down to the 'online born' sector using TV for growth



Source: Nielsen, Thinkbox-created category of online-born businesses. Jan-Jun 2018/19/20/21/22

The online-born surge varies by sector

Increase in linear TV expenditure, Jan to Jun 2022 vs. Jan to Jun 2021



Source: Nielsen, Thinkbox-created category of online-born businesses. Brands shown are not the exhaustive list, but account for the majority of spend

SECTION THREE

Pricing

$$E = \frac{mc^2}{\sqrt{1 - \frac{v^2}{c^2}}}$$

defence attack

$$98 + 17$$

Class

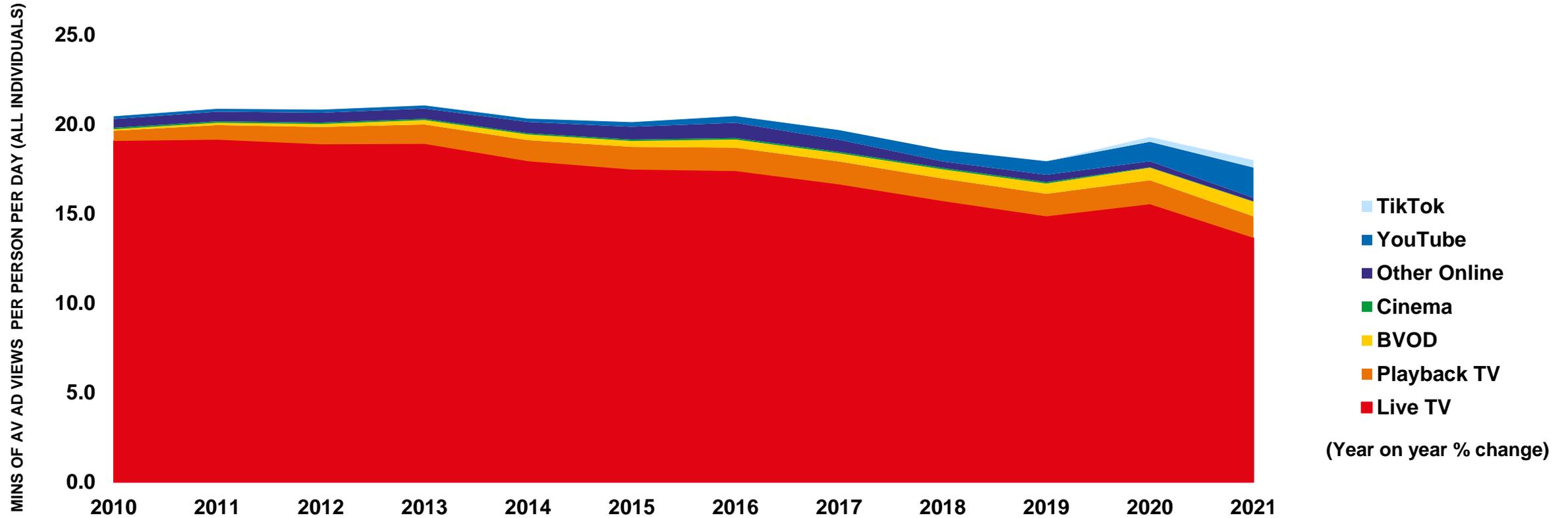
Electric Pace

$$\int \frac{dx}{5x-3} = \int \frac{1}{5} \frac{du}{u} = \frac{1}{5} \ln |u| + c$$
$$= \frac{1}{5} \ln(5x-3) + c$$

$$\begin{aligned} &+(90+81+73) \\ &+(234+223+244) \\ &= 710 \end{aligned}$$

Panini "The GOAT of Swaps"

Video advertising time is being squeezed by SVOD...



Source: 2010-2021, BARB / Broadcaster stream data / IPA Touchpoints 2021

Adult linear TV CPT is increasing as a result



Source: BARB/Techedge, AA/WARC

In real terms, the adult CPT is in-line with the last 10 years



Source: BARB/Techedge, AA/WARC, ONS

Vs. other markets, UK TV advertising is well priced

Global Ad Trends

TV ad costs have risen quickly over the last two years

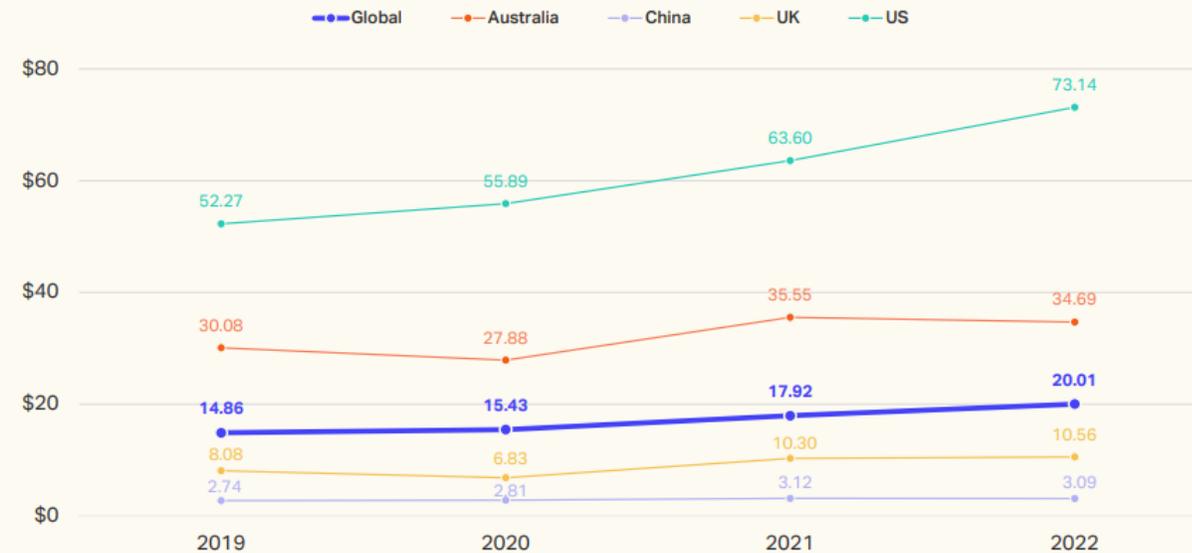
Ad buyers have been negotiating a dramatic spike in TV media costs since mid-2020. The rising price of TV ads means that brands may need to spend more to maintain previous levels of reach and exposure to audiences.

Globally, TV CPMs (cost per thousand) have increased 31.2% since 2019 – the steepest incline in more than two decades – and are up 9.9% year on year in 2022, according to WARC Media. The trend is especially pronounced in western markets: in the US, TV CPMs are forecast to reach \$73.14 in 2022, an increase of 40.0% on pre-COVID costs.

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Global, TV Media Cost

CPM, USD, nominal



Note: Data are WARC estimates, calculated by applying the WFA's media inflation figures – drawn from a panel of media agencies and consultancies – to historic data.

Source: WARC Media, WFA

WARC

5

And TV remains very good value Vs. online video

Average cost per 30 second (000s)

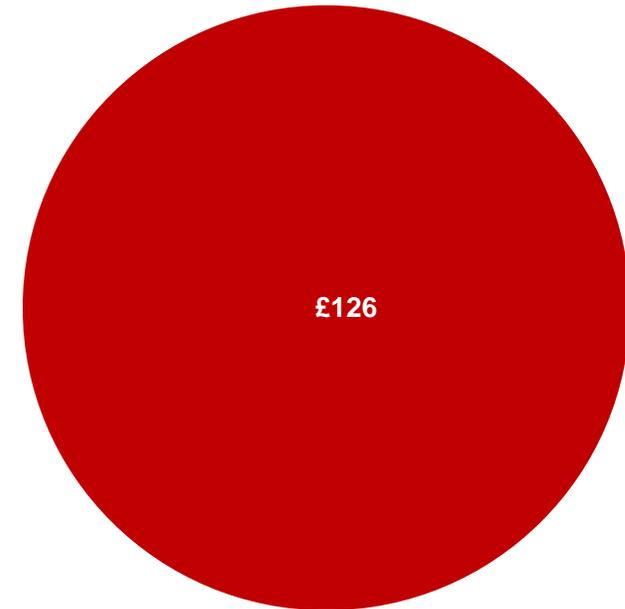
TV (inc BVOD)



YouTube



Other online video



Source: 2021, Thinkbox estimates using AA/WARC, Comscore, BARB, Current price

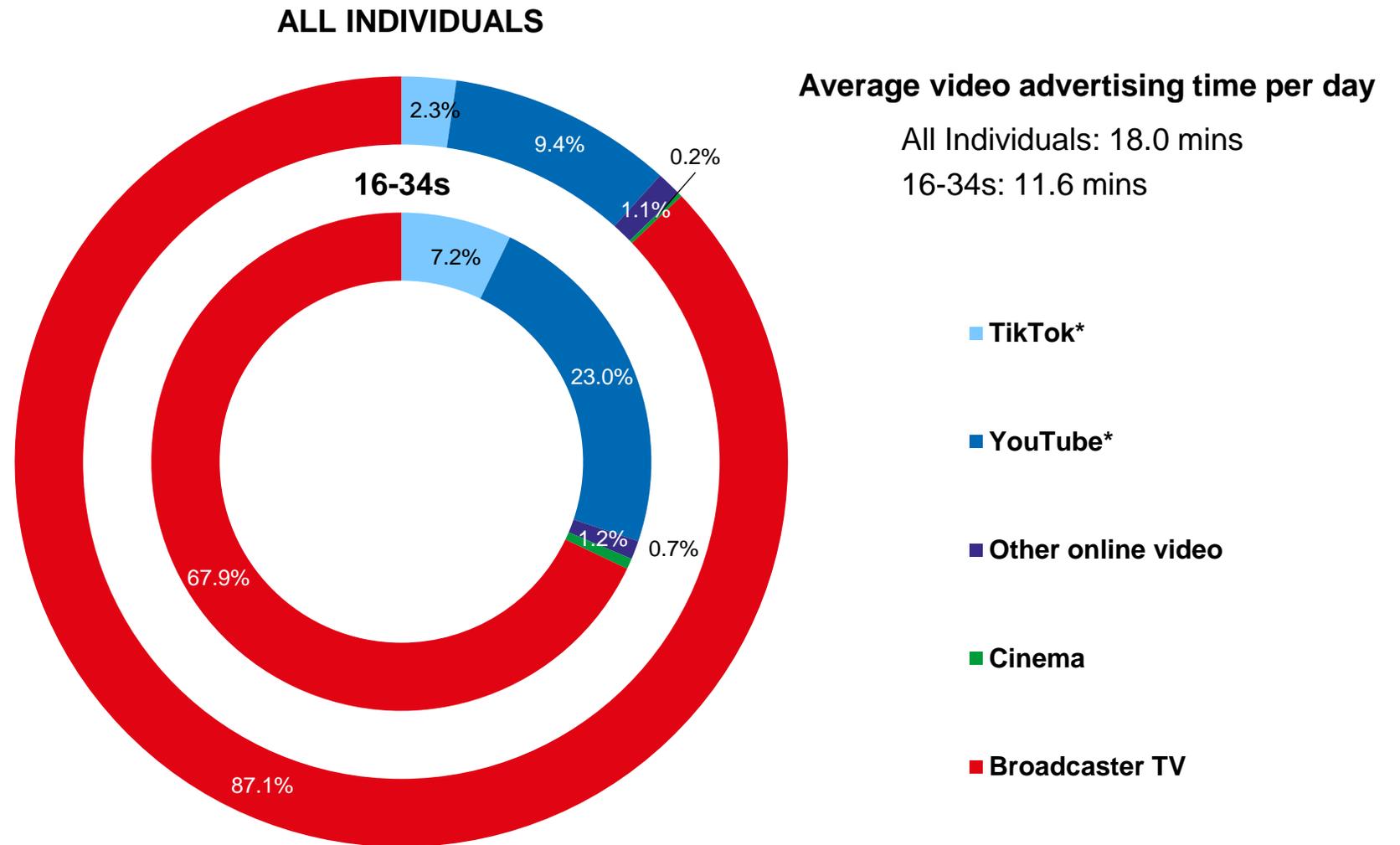
SECTION FOUR

Planning



ITV Hub "More Epic Series Than Ever Before"

Planning in the new age of video is an art form



Source: 2021, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2021 / Rentrak * YouTube ad time modelled at 3% of content time, TikTok ad time modelled at 1.5% of content time

Is everything about to change?

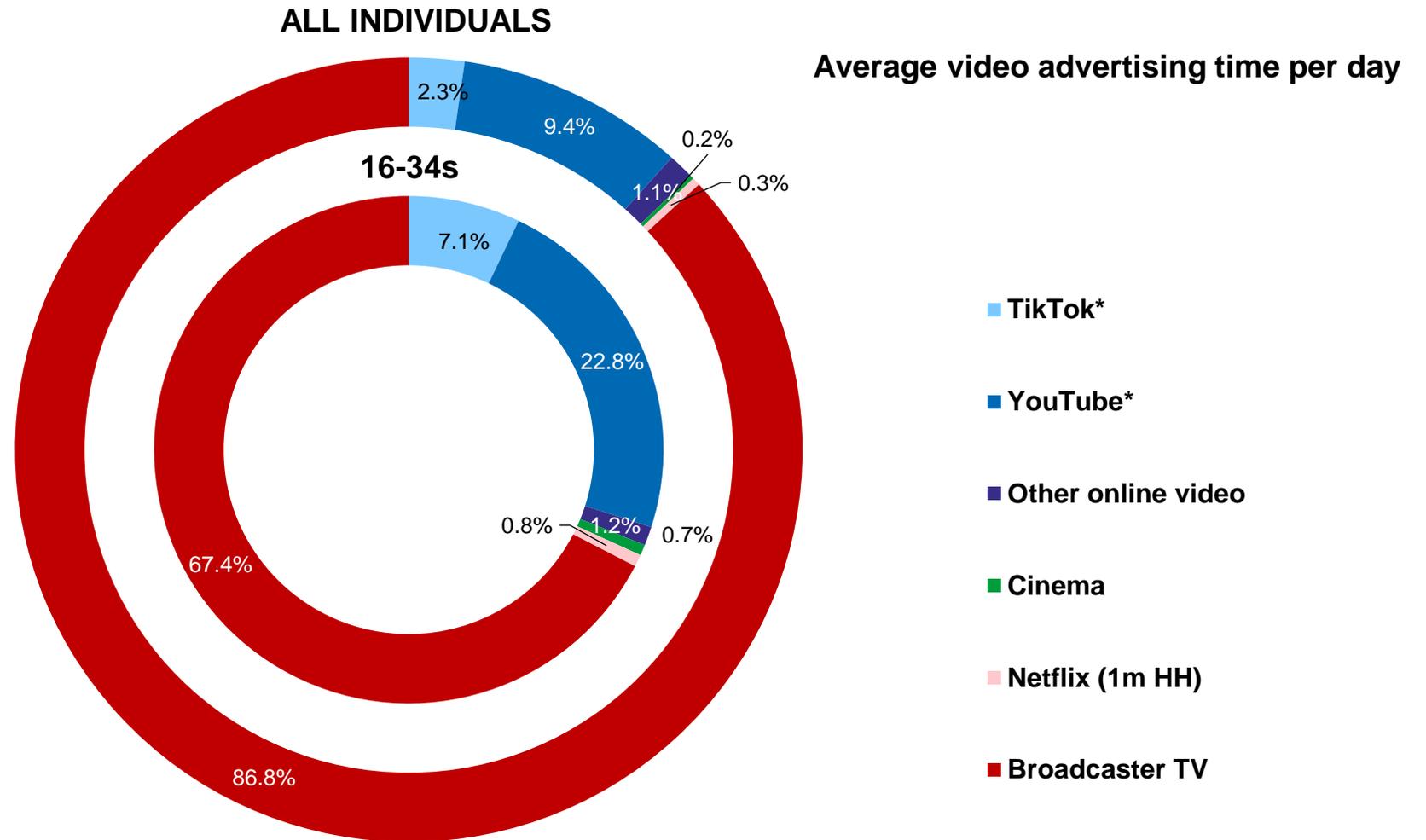
Netflix to launch cheaper ad-supported subscription tier in November

Streaming platform reportedly brings forward low-cost option initially planned for 2023 to get ahead of similar service with ads from Disney+



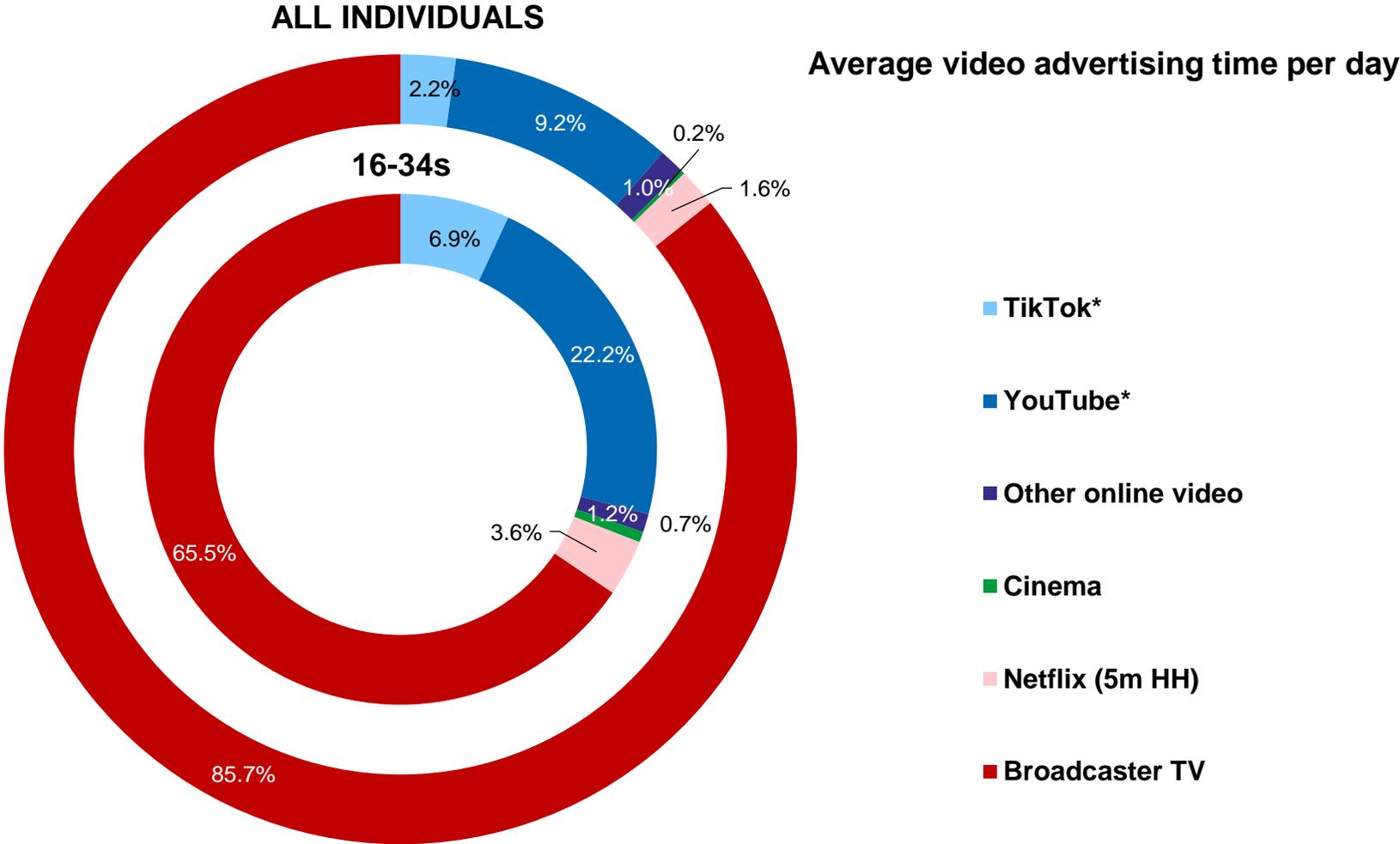
📹 According to reports, Netflix's new streaming option with ads is expected to be priced between \$7 and \$9. Photograph: Dado Ruvic/Reuters

1 million Netflix 'lite' subs would generate approx 0.3% of all AV ad time



Source: 2021, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2021 / Rentrak * YouTube ad time modelled at 3% of content time, TikTok ad time modelled at 1.5% of content time

5 million Netflix 'lite' subs would generate approx 1.6% of all AV ad time



Source: 2021, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2021 / Rentrak * YouTube ad time modelled at 3% of content time, TikTok ad time modelled at 1.5% of content time



**Great planning is
more vital than ever**

In summary

- TV viewing continues to drop following the pandemic induced high
- SVOD share of TV time looks to be stabilising
- The overall ad market is very consistent
- Video spend is the fastest growing media format
- The online-born surge has slowed, but continues to grow
- Ad supported SVOD will help, but not solve the TV quality impact gap
- Great planning is the solution!



Derry Girls, Channel 4

The logo for thinkbox, featuring the word "thinkbox" in a white, lowercase, sans-serif font. A small white square is positioned above the letter "x". The logo is centered within a light blue circular background.

thinkbox

Media Mix Navigator re-launch

WPP powered by

**GAIN
THEORY**

MEDIACOM

Wavemaker

MINDSHARE

Today

01

A recap of Demand
Generation 2019

02

What's changed and
what hasn't since 2019

03

The new and improved
Media Mix Navigator

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Generation 2019

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“What is the right way to invest my marketing budget?”

In 2019, we built the ultimate effectiveness databank



50 brands
14 categories
Breadth of budget levels & product types
10 Media Channels
10 KPIs
£1.4bn media spend

The answer is...
nuanced



Six factors determine the optimal mix

1.

The context of the brand
(sector, online sales,
mass vs niche)

2.

The outcome we're
looking to drive
(volume vs value)

3.

How much budget is
required for fulfilment
(brand search,
affiliates etc.)

4.

How scalable different
media channels are
(diminishing returns)

5.

The speed of payback
required
(weeks, months or
years)

6.

The risk profile of the
brand
(balancing risk and
potential reward)

There is no such thing as the average brand, so we built a tool to help you work out the answer for your business

Discover the power of TV advertising

[ABOUT](#) [CONTACT](#) [LOGIN](#) [REGISTER](#) 🔍

WHY TV?
GETTING ON TV
HOW TO USE TV
RESEARCH
CASE STUDIES
CREATIVE
NEWS & OPINION
TV EFFECTIVENESS

MEDIA MIX NAVIGATOR

Category ⓘ

Please Choose...
▼

Appeal ⓘ

Please Choose...
▼

% of online sales ⓘ

Please Choose...
▼

Brand size (£m) ⓘ

20

Annual media spend (£m) ⓘ

2

Output ⓘ

Please Choose...
▼

Minimise risk? ⓘ

Please Choose...
▼

[DOWNLOAD PDF + CSV](#)

About

The Media Mix Navigator, powered by econometrics, helps you maximise business returns from your media investment.

It allows you to interrogate optimum media mixes, based on specific business parameters, to drive increased profit or revenue across the first year of investment and the resulting 'base' sales growth across the following two years.

This optimiser draws on data from 55 MediaCom, Wavemaker and Gain Theory client brands, totalling some £2 billion of media spend over 3 years (2017-2019). These have been carefully chosen to represent as many business types as possible.

MEDIA MIX NAVIGATOR

Category ⓘ

Online retail

Appeal ⓘ

Mass Market

% of online sales ⓘ

100%

Brand size (£m) ⓘ

500

Annual media spend (£m) ⓘ

20

Output ⓘ

Revenue

Minimise risk? ⓘ

No

Optimal channel mix (Year 1) ⓘ

- TV 38%
- Search search 24%
- Wavemaker VOD 13%
- Social media 6%
- Print 5%
- Radio 4%
- Online video 4%
- Out of home 3%
- Online display 1%
- Cinema 1%

Revenue by year ⓘ

Business results ⓘ

	Year 1	Year 2	Year 3	Total
Total spend	£20.0m	£25.0m	£35.0m	£75.0m
Revenue	£80.0m	£81.2m	£52.3m	£213.5m
Base growth (Y1-Y2)	£10.0m	£15.0m	£20.5m	£45.5m
Total	£90.0m	£96.2m	£72.8m	£259.0m

	Year 1	Year 2	Year 3	Total
Revenue ROI	3.5	3.2	3.1	3.3
Campaign uplift	4.0	3.8	3.6	3.8
Base growth (Y1-Y2)	2.5	2.2	2.7	2.5

Confidence Interval +/-2% +/-2% +/-2%

How to use

- Select the options most relevant for your brand
- Results will automatically display once all fields complete
- Select 'Year 2' and 'Year 3' to view impact of investment in subsequent periods
- Adjust criteria and results automatically update
- PDF and CSV download available

Please see notes below for further considerations.

Today

01

A recap of Demand
Generation 2019

02

What's changed and
what hasn't since 2019

03

The new and improved
Media Mix Navigator

A lot has happened since we last got together



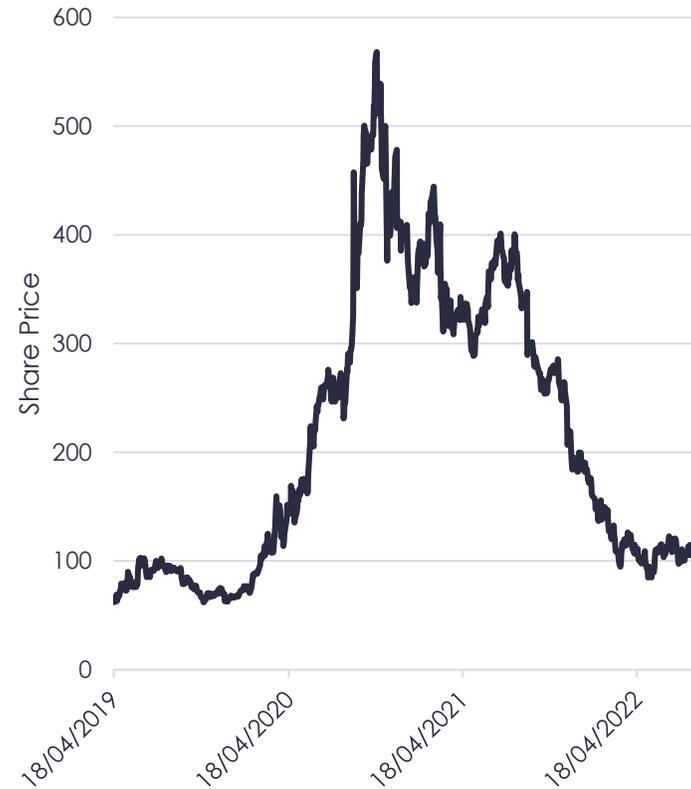
Coronavirus: 'You must stay at home', Boris Johnson orders

Prime Minister Boris Johnson instructs all UK citizens to stay at home, to protect the NHS during the coronavirus pandemic.

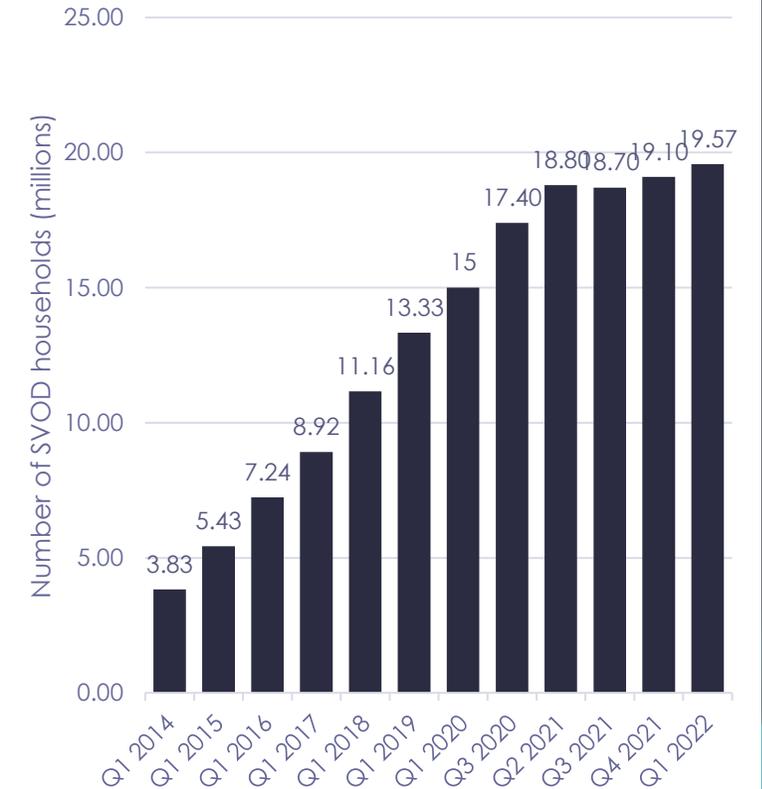
From this evening, people can only leave home for one of the four following reasons:

- Shopping for groceries or essentials

Zoom Share Price



Number of SVOD households



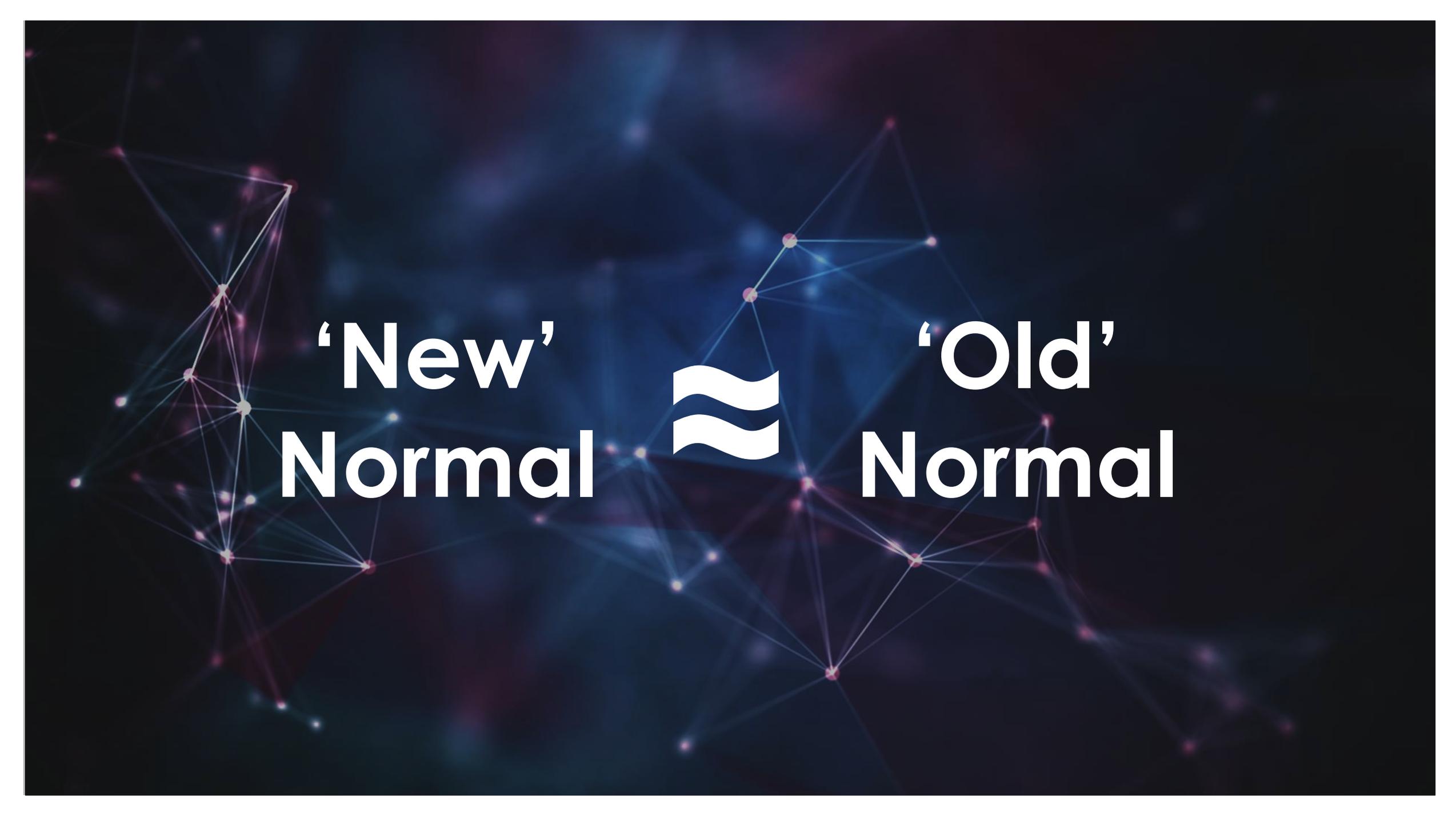
**So we've
updated the
databank to
see what's
changed**

52 Brands

14 Categories*

10 Media Channels

£2.2bn Spend (2018-2021)



**‘New’
Normal** \approx **‘Old’
Normal**

Four key take-outs from the latest data

1

Changes in channel efficiency over time are modest, predominantly driven by changing media costs

2

Long-term effects are significant, more than doubling the short-term response from media

3

Sector makes a big difference to optimal channel mix – but comms strategy may mean 'optimal' isn't 'right' for a given brand

4

Minimising risk materially impacts channel choice, which is an important consideration in uncertain times

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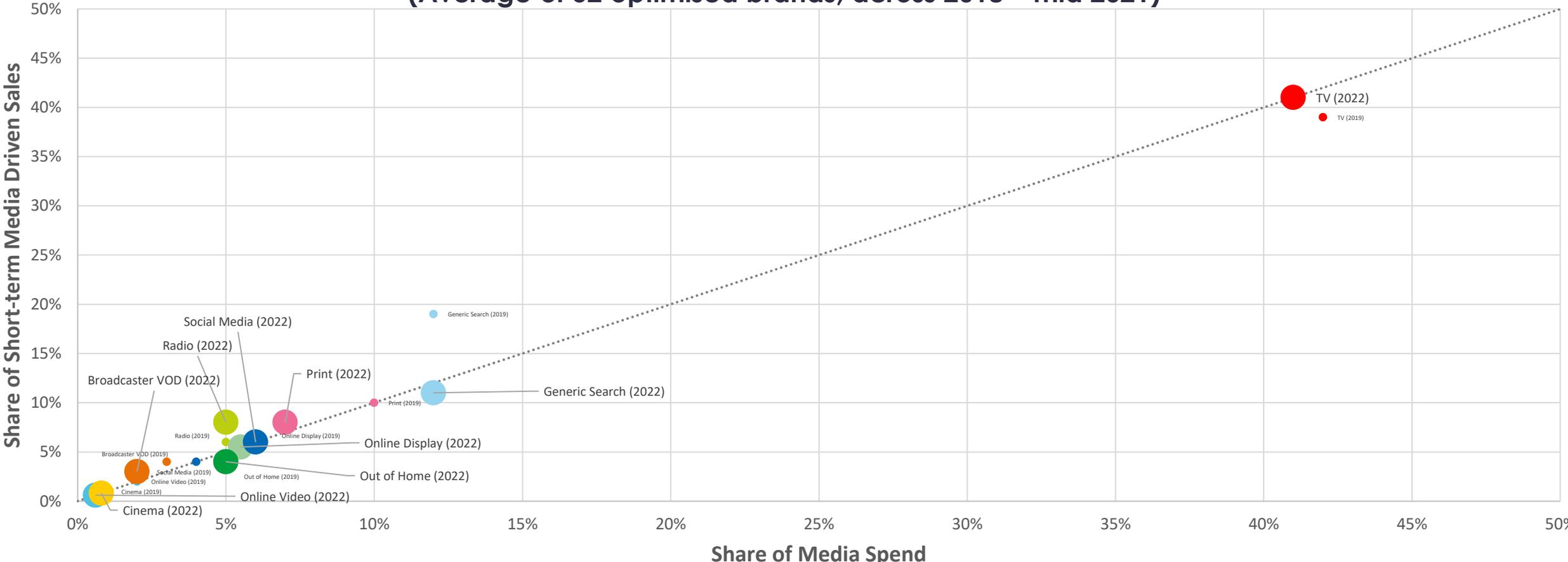
Sector makes a big difference to optimal channel mix – but comms strategy may mean 'optimal' isn't 'right' for a given brand

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Minimising risk materially impacts channel choice, which is an important consideration in uncertain times

The macro-effectiveness of channel performance is similar to the 2019 level – TV & Generic Search command the most spend & sales effects

Share of Short-term Media Driven Sales vs. Share of Media Spend
(Average of 52 optimised brands, across 2018 – mid 2021)

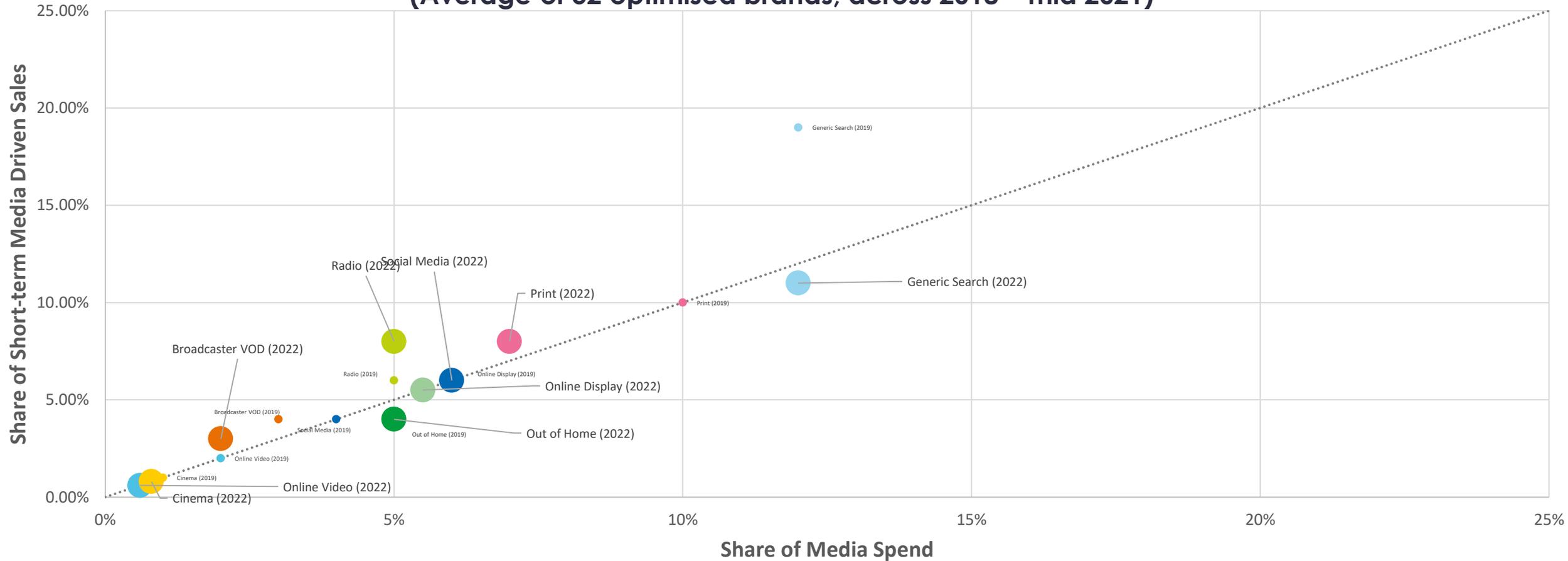


Source: 'Demand Generation', Nov 2019, MediaCom/Wavemaker/Gain Theory; Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Generic PPC is now more in line with other channels, given cost increases. There have also been some small changes for the other channels

Zooming into smaller channels

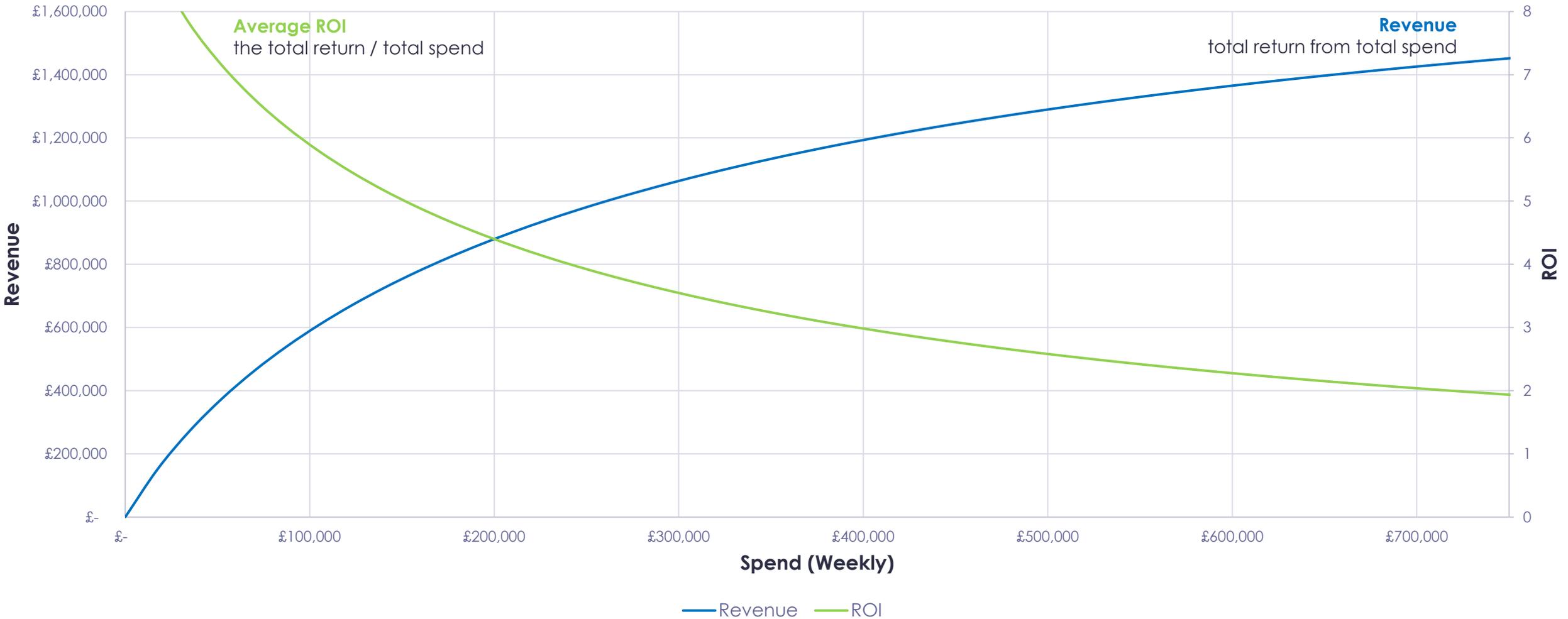
Share of Short-term Media Driven Sales vs. Share of Media Spend (Average of 52 optimised brands, across 2018 – mid 2021)





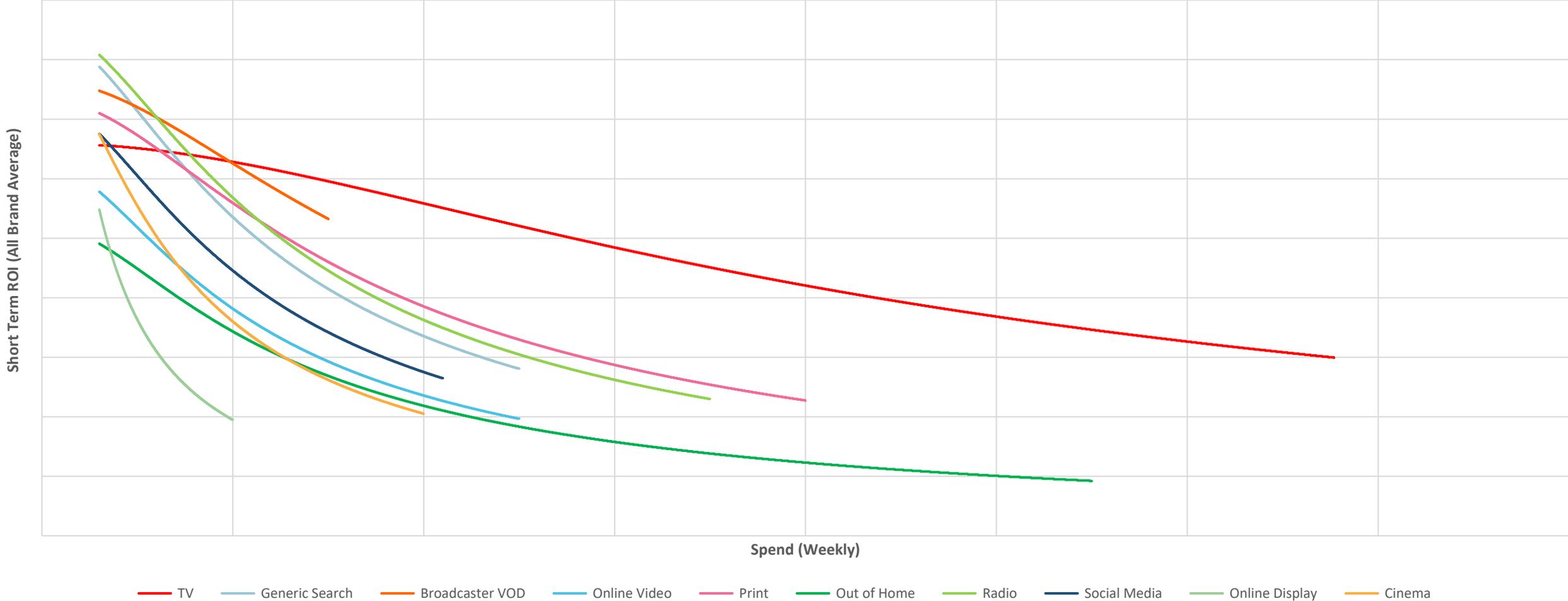
**Surely this would change if
brands just spent more in
other channels?"**

Not necessarily, all channels will experience diminishing returns where spending more gets us progressively less payback



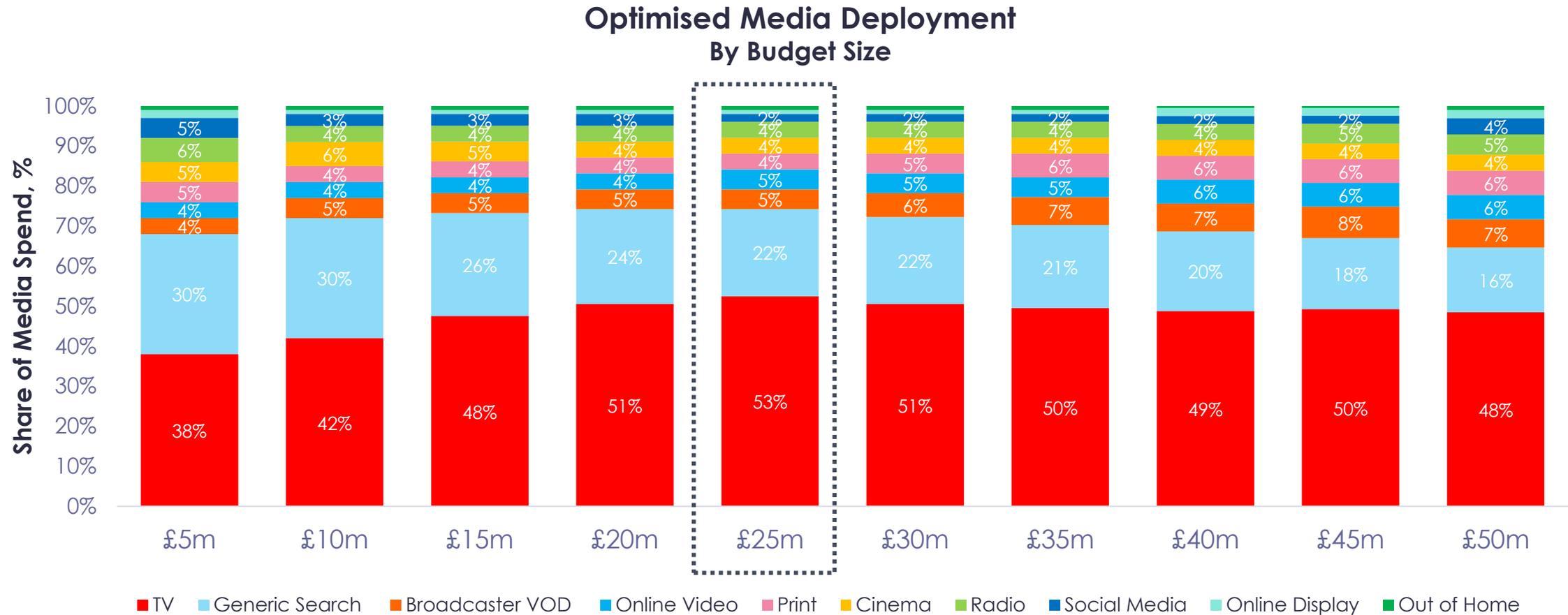
But this happens at different rates in different channels

Average Short-term Revenue ROI Curves



Source: 'Demand Generation', Nov 2019, MediaCom/Wavemaker/Gain Theory

Finding the optimal mix is about balancing these curves – it will vary significantly depending on spend levels



Note: These scenarios are based on a Mass Market brand, with 11-20% Online Sales, £500m brand size, not minimising risk and across all categories.

Four key take-outs from the latest data

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Changes in channel efficiency over time are modest, predominantly driven by changing media costs

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Long-term effects are significant, more than doubling the short-term response from media

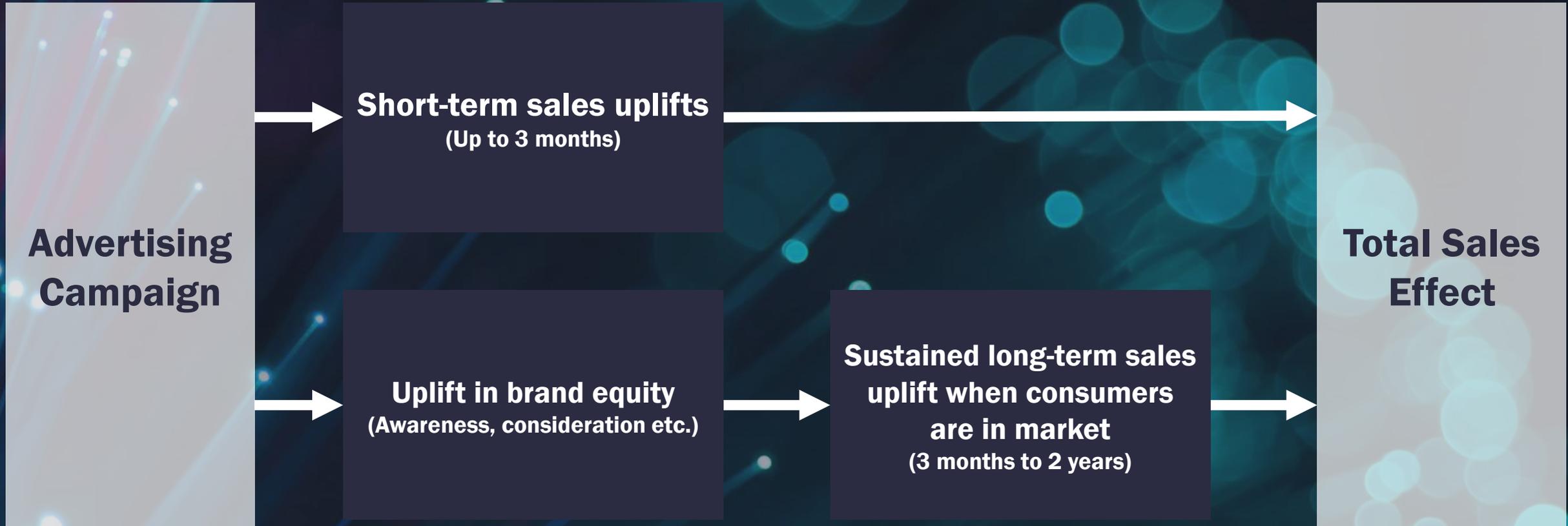
3

Sector makes a big difference to optimal channel mix – but comms strategy may mean 'optimal' isn't 'right' for a given brand

4

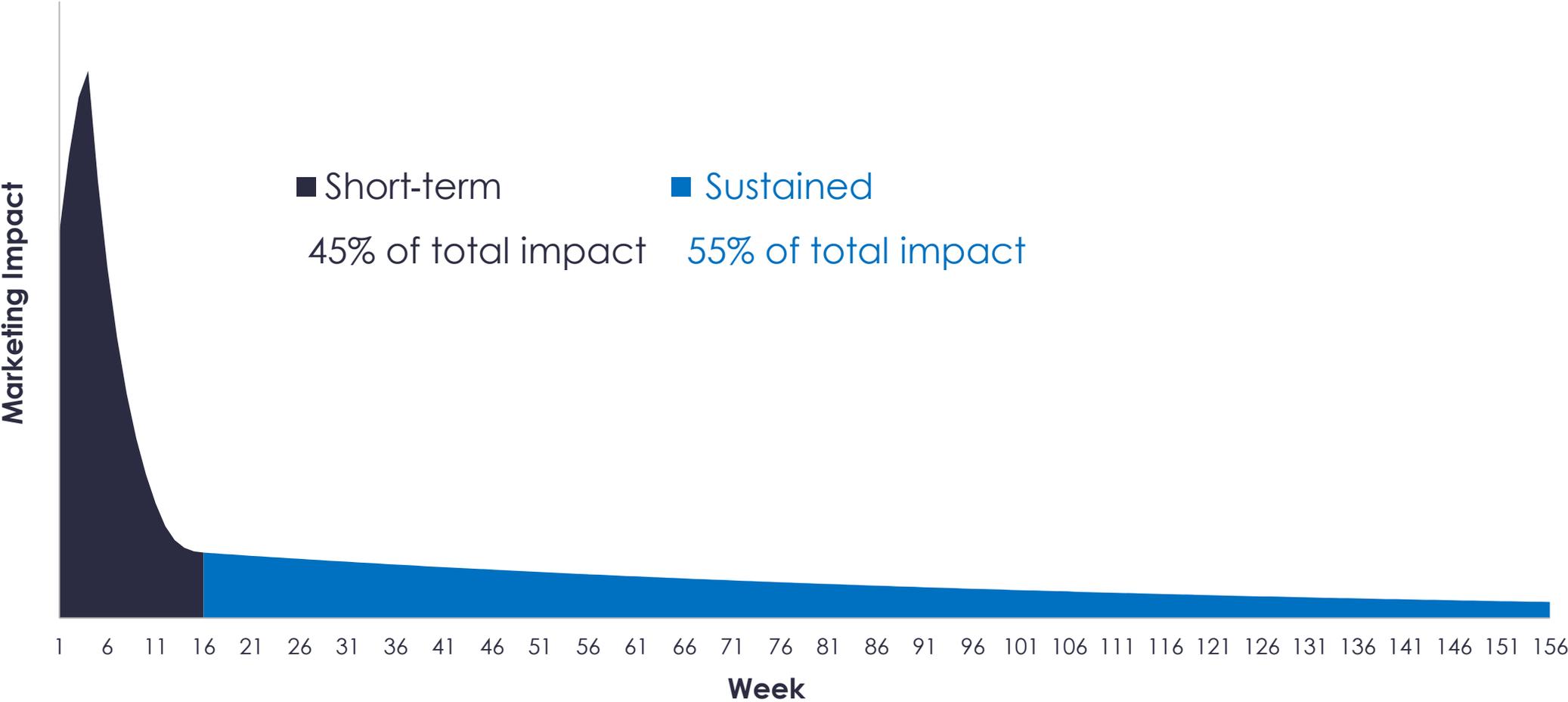
Minimising risk materially impacts channel choice, which is an important consideration in uncertain times

What do we mean by the long-term impact of media?



What does a long-term/sustained impact look like?

An example for a typical media response from a 4-week campaign



Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Long-term multipliers represent the ratio between a channels short & long term payback



$$\text{Long Term Multiplier} = \frac{\text{Long term sales}}{\text{Short term sales}} = \frac{£12}{£10} = \mathbf{1.2}$$

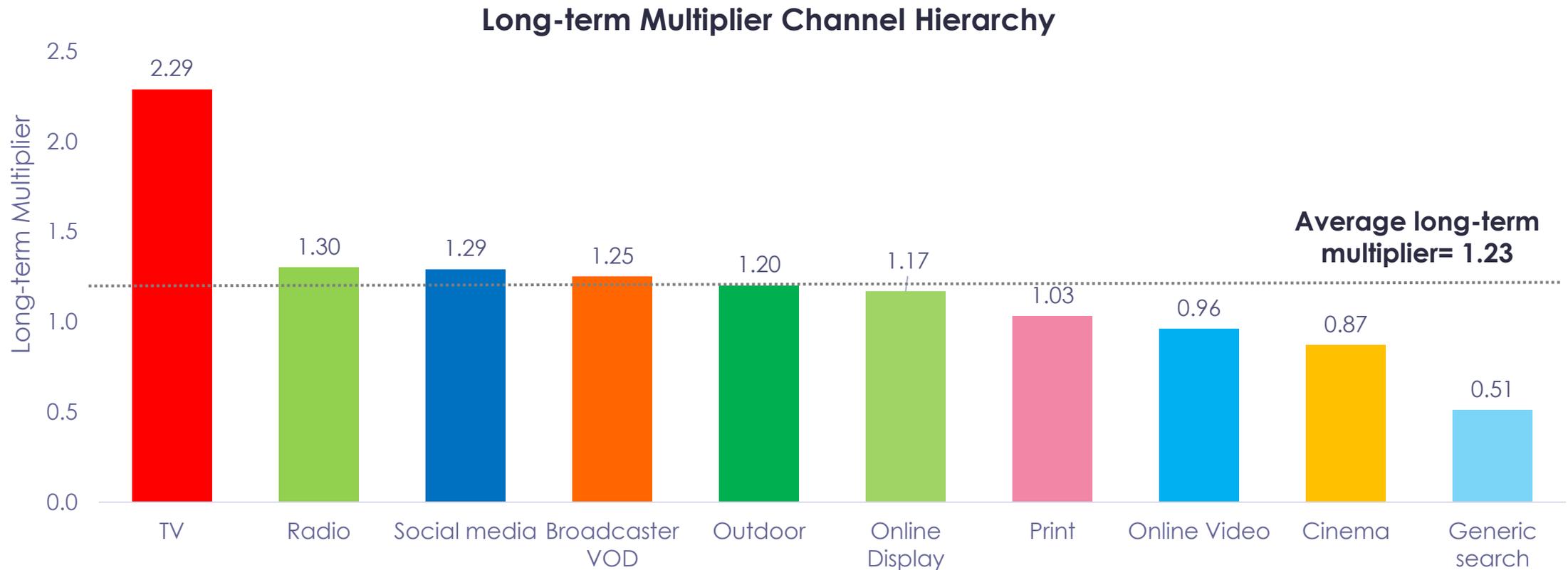
We have improved the way we have captured longer term effects in the databank

**Actual data
collected for
brands in
the
databank**

**Updated to
2018 – mid
2021**

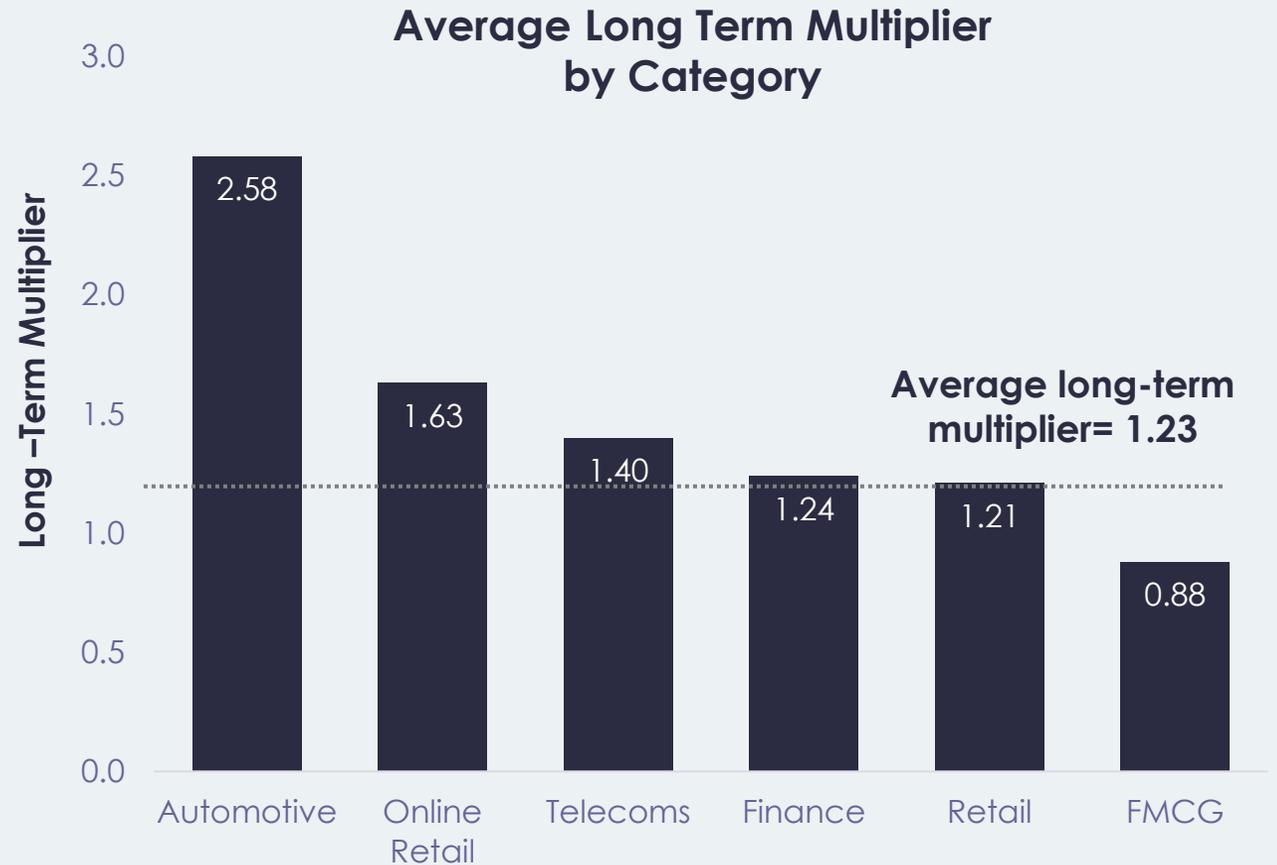
**Now
bespoke to
each
category**

The longer term effects more than double the short term effects on average



Long term Multiplier = % increase on a channel's short term effect, driven by in the long term

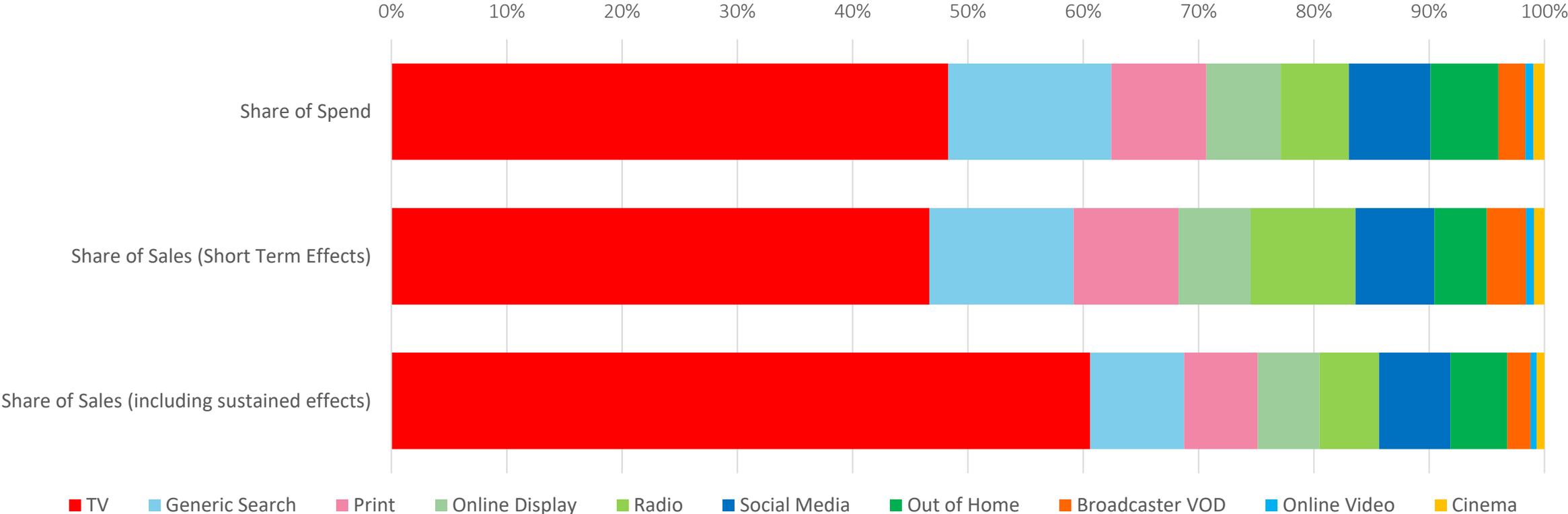
There are significant differences across categories, driven by the media mix and purchase cycle



NB: Minimal long-term effect identified in Travel however this is likely a function of the analysed period i.e. long-term effects from 2019 activity couldn't mature in 2020 due to Covid disruption

Including the long-term reveals the true impact of advertising

Share of Short-term Media Driven Sales vs. Share of Media Spend
(Average of 52 optimised brands, across 2018 – mid 2021)



Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

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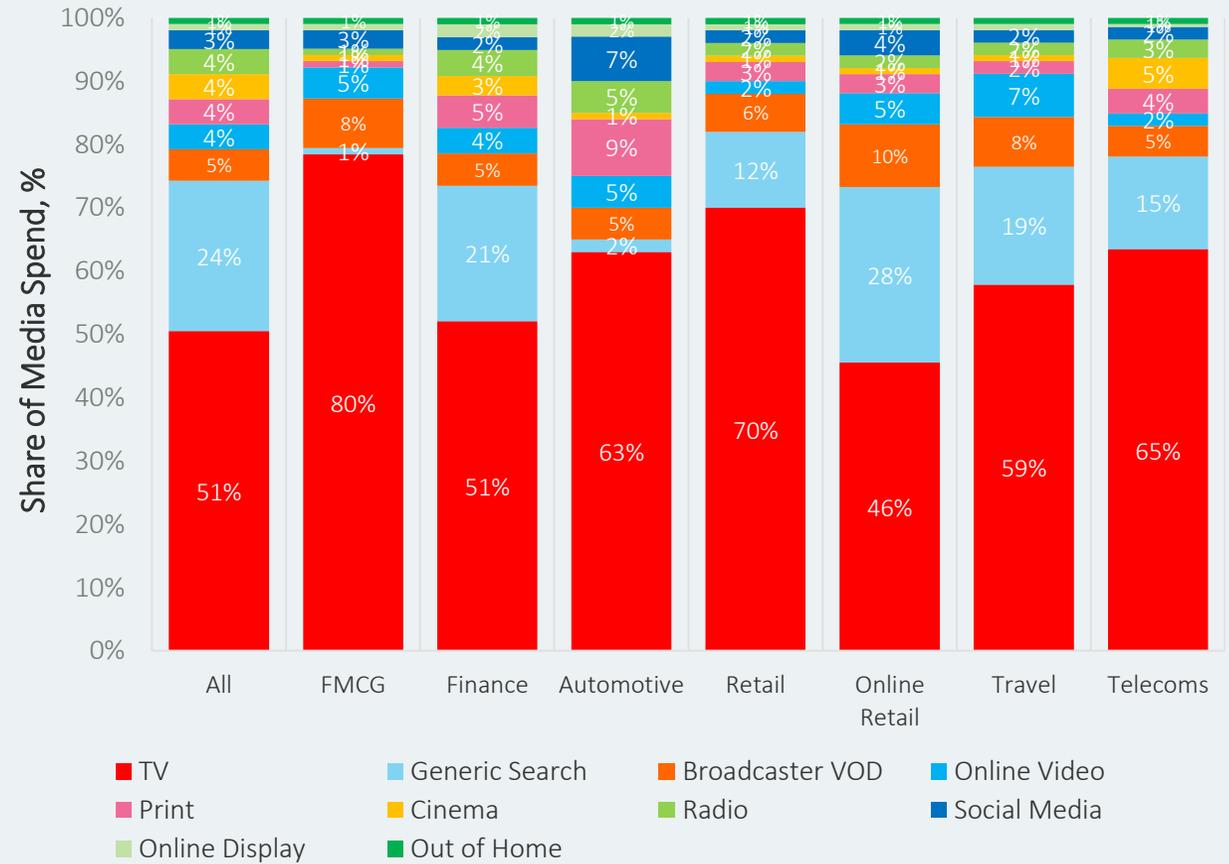
Sector makes a big difference to optimal channel mix – but comms strategy may mean 'optimal' isn't 'right' for a given brand

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Minimising risk materially impacts channel choice, which is an important consideration in uncertain times

Sector creates big variances in the optimal budget mix

Optimised Media Deployment 2022 Study, By Category

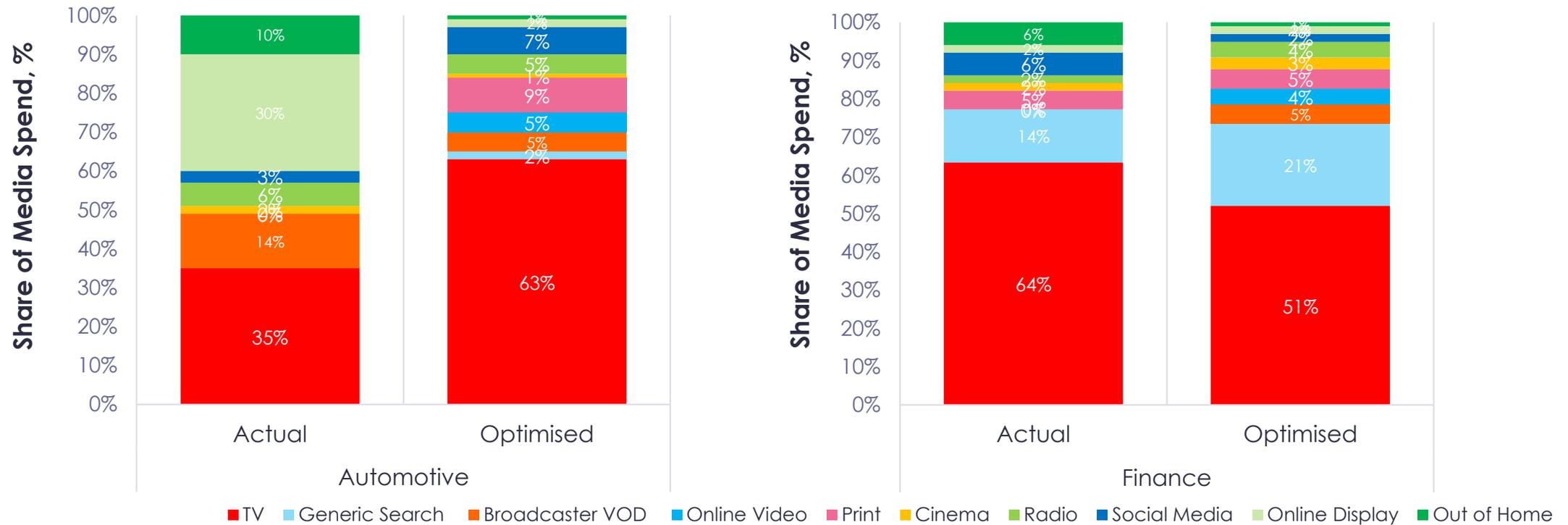


Channels with sufficient sector level benchmarks only. Based on £500m brand size (£300m for FMCG), 10-20% online sales not minimising risk and media budget of £20m.

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Actual category average channel mixes are often very different from optimal – two examples

Actual vs. Optimised Media Deployment: 2022 Study By Category



Channels with sufficient sector level benchmarks only. Based on £500m brand size, 0-24% online sales not minimising risk and media budget of £20m.

Four key take-outs from the latest data

1

Changes in channel efficiency over time are modest, predominantly driven by changing media costs

2

Long-term effects are significant, more than doubling the short-term response from media

3

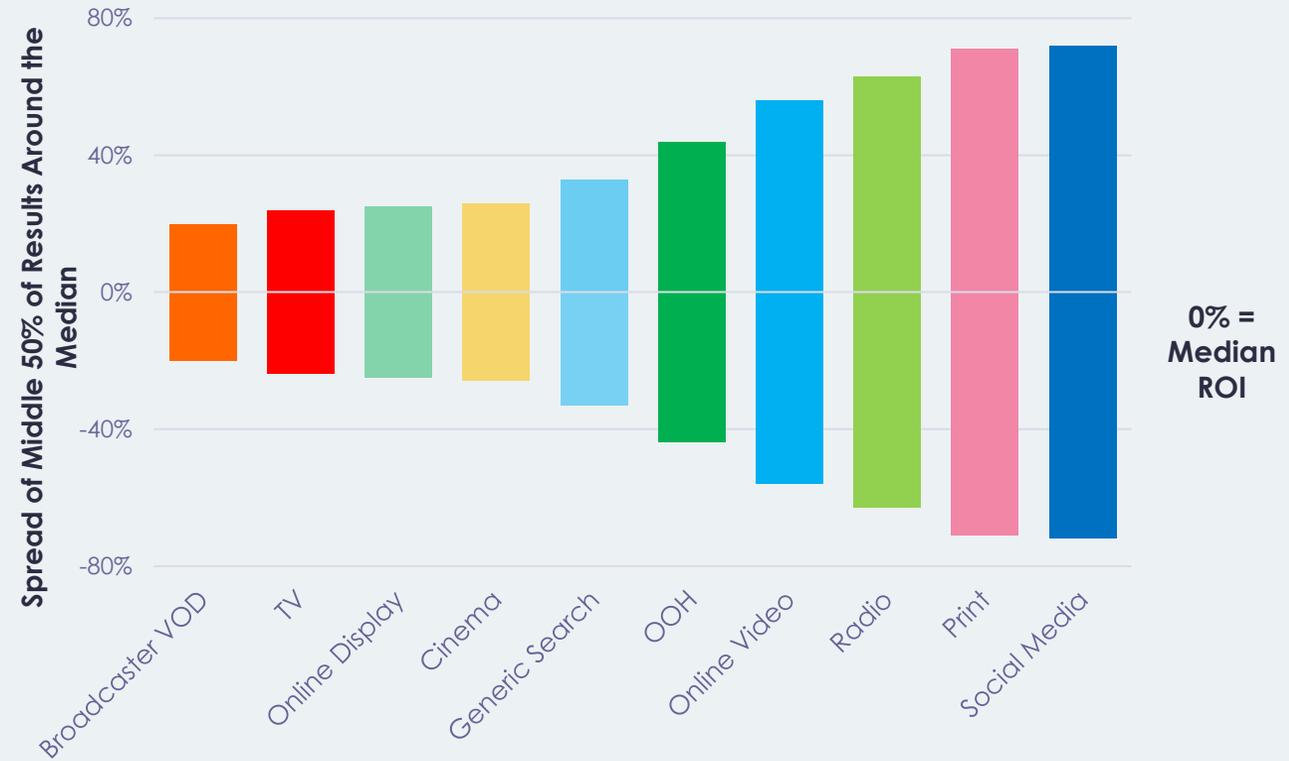
Sector makes a big difference to optimal channel mix – but comms strategy may mean 'optimal' isn't 'right' for a given brand

4

Minimising risk materially impacts channel choice, which is an important consideration in uncertain times

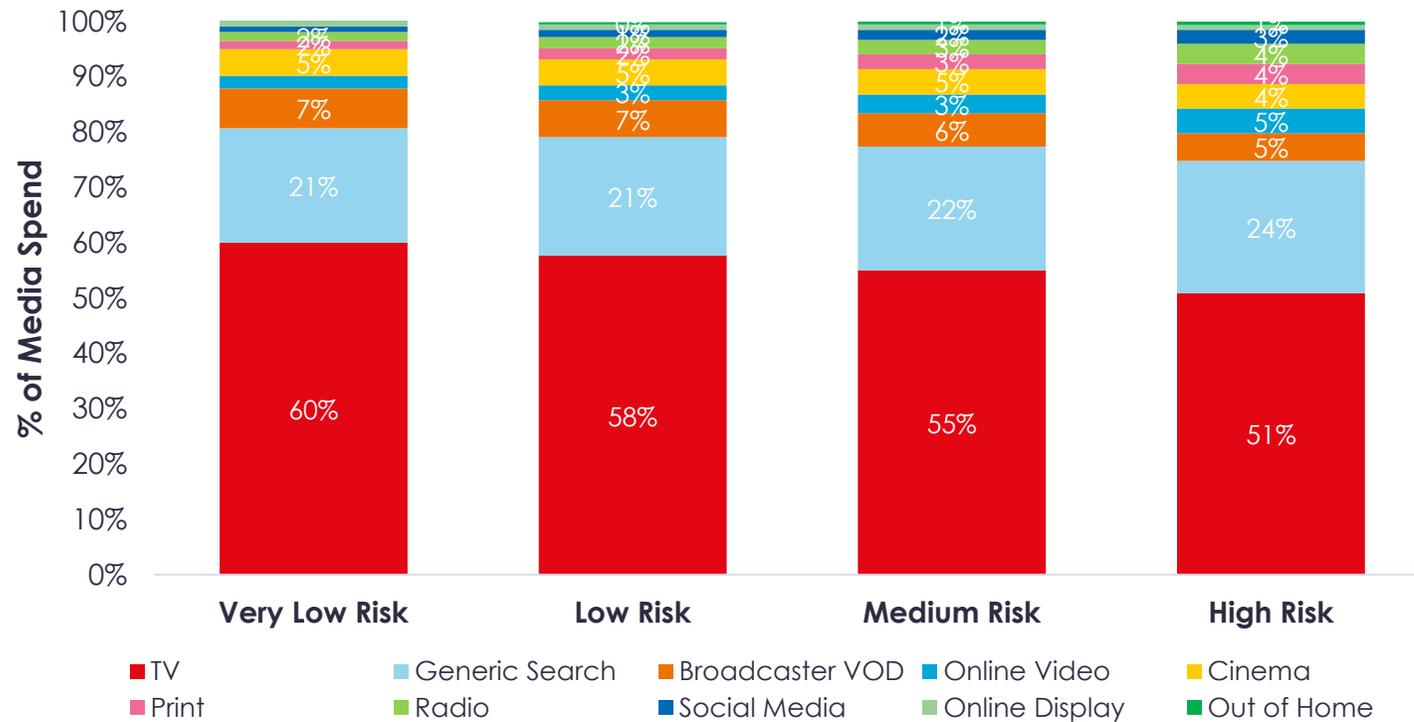
The predictability of payback continues to vary greatly channel to channel

The Variability of Returns by Channel
2022 Study (Data 2018 – Mid 2021)



And attitude to risk still has a tangible impact on the optimal channel mix & potential upside

Optimised Media Deployment
By Risk Level, 2022 Study



Channels with sufficient sector level benchmarks only. Based on £500m brand size, 11-20% online sales and media budget of £20m. Assumes 30% margin.

PRIORITISE CERTAINTY

Focus a higher proportion
of investment into
channels with more
consistent performance
across all brands

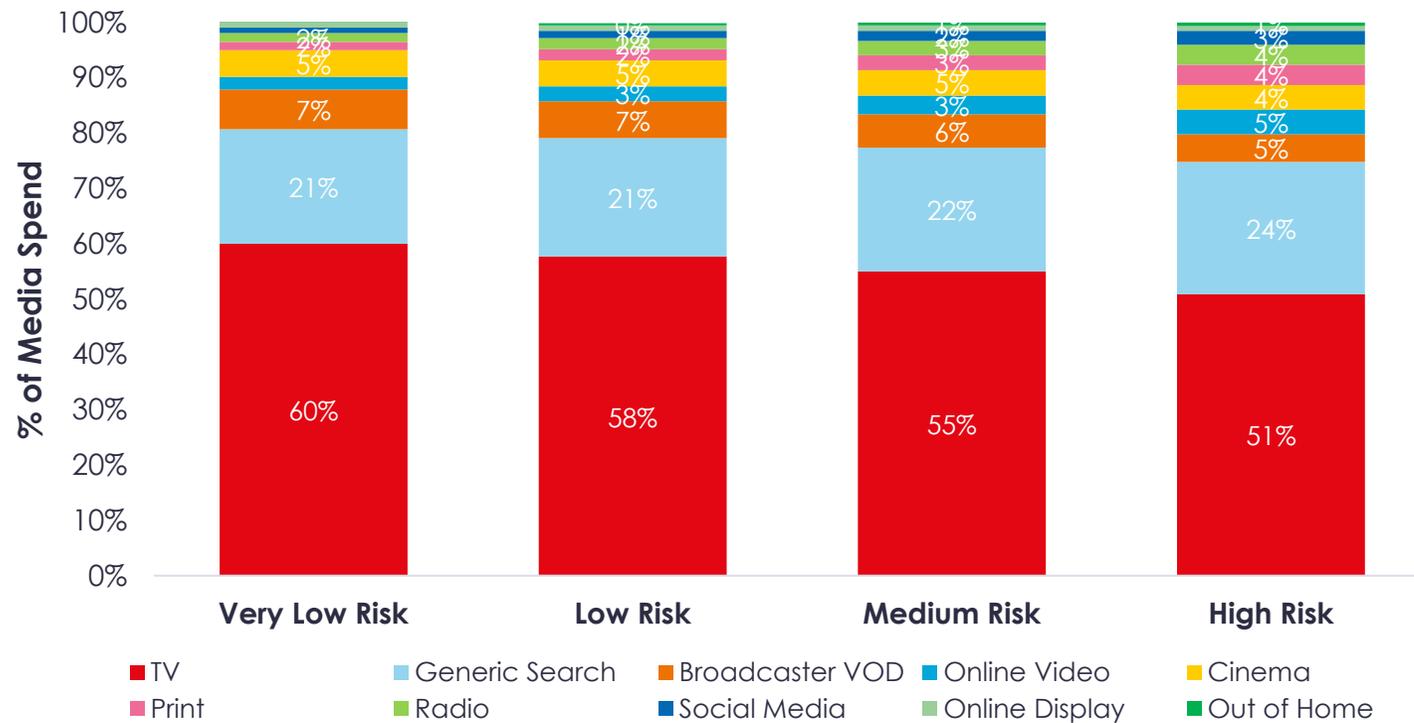


PRIORITISE OPPORTUNITY

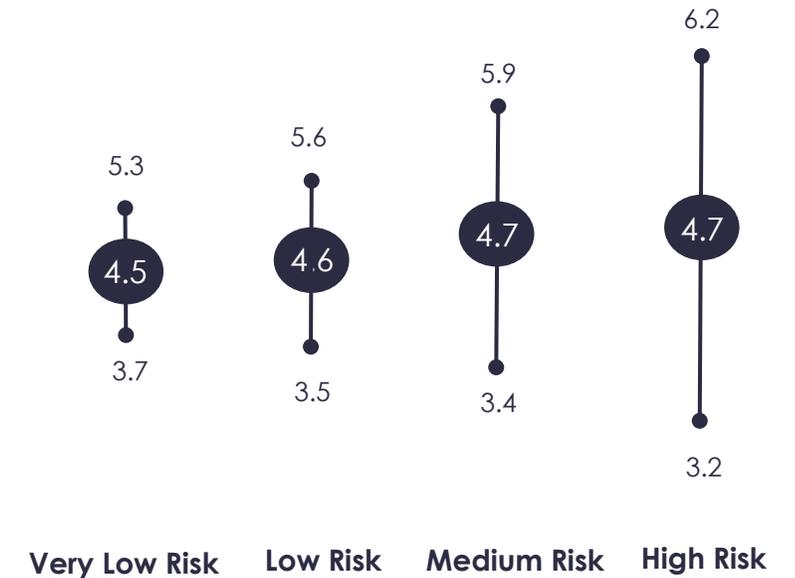
Focus a higher proportion of
investment into channels with
highest potential returns
albeit increasing the risk of
something not working for
this brand

And attitude to risk still has a tangible impact on the optimal channel mix & potential upside

Optimised Media Deployment By Risk Level, 2022 Study



Profit ROI and confidence interval By Risk Level, 2022 Study



Channels with sufficient sector level benchmarks only. Based on £500m brand size, 11-20% online sales and media budget of £20m. Assumes 30% margin.

Today

01

A recap of Demand
Generation 2019

03

The new and improved
Media Mix Navigator

The original Demand Generator tool has been warmly welcomed across the industry and won a number of awards



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WHY TV?
GETTING ON TV
HOW TO USE TV
RESEARCH
CASE STUDIES
CREATIVE
NEWS & OPINION
TV EFFECTIVENESS

MEDIA MIX NAVIGATOR

Category ⓘ

Please Choose... ▾

Appeal ⓘ

Please Choose... ▾

% of online sales ⓘ

Please Choose... ▾

Brand size (£m) ⓘ

20

Annual media spend (£m) ⓘ

2

Output ⓘ

Please Choose... ▾

Minimise risk? ⓘ

Please Choose... ▾

[DOWNLOAD PDF + CSV](#)

About

The Media Mix Navigator, powered by econometrics, helps you maximise business returns from your media investment.

It allows you to interrogate optimum media mixes, based on specific business parameters, to drive increased profit or revenue across the first year of investment and the resulting 'base' sales growth across the following two years.

This optimiser draws on data from 55 MediaCom, Wavemaker and Gain Theory client brands, totalling some £2 billion of media spend over 3 years (2017-2019). These have been carefully chosen to represent as many business types as possible.

MEDIA MIX NAVIGATOR

Optimal channel mix (Year 1)

- TV 38%
- Search 24%
- Social media 6%
- Print 5%
- Radio 4%
- Online video 4%
- Out of home 3%
- Online display 1%
- China 1%

Business results

	Year 1	Year 2	Year 3	Total
Total spend	£20.0m	£25.0m	£25.0m	£70.0m
Revenue	£88.0m	£82.0m	£52.0m	£222.0m
Base growth (Y1-Y2)	£88.0m	£95.0m	£58.0m	£241.0m
Total	£108.0m	£127.0m	£110.0m	£345.0m

How to use

- Select the options most relevant for your brand
- Results will automatically display once all fields complete
- Select 'Year 2' and 'Year 3' to view impact of investment in subsequent periods
- Adjust criteria and results automatically update
- PDF and CSV download available

Please see notes below for further considerations.

20,260 visitors

85 countries

72 days of running scenarios



Four use cases of the tool to shape planning

1

As a starting point for allocation and payback where we don't have access to specific econometrics

2

Showing the impact on business outcomes of channel or budget changes

3

New business – it provides a credible source of ROI norms when you're working with limited information

4

Hacking otherwise impossible questions

Today we're launching the new and improved Media Mix Navigator

**Data
refresh**
2018 – mid-2021

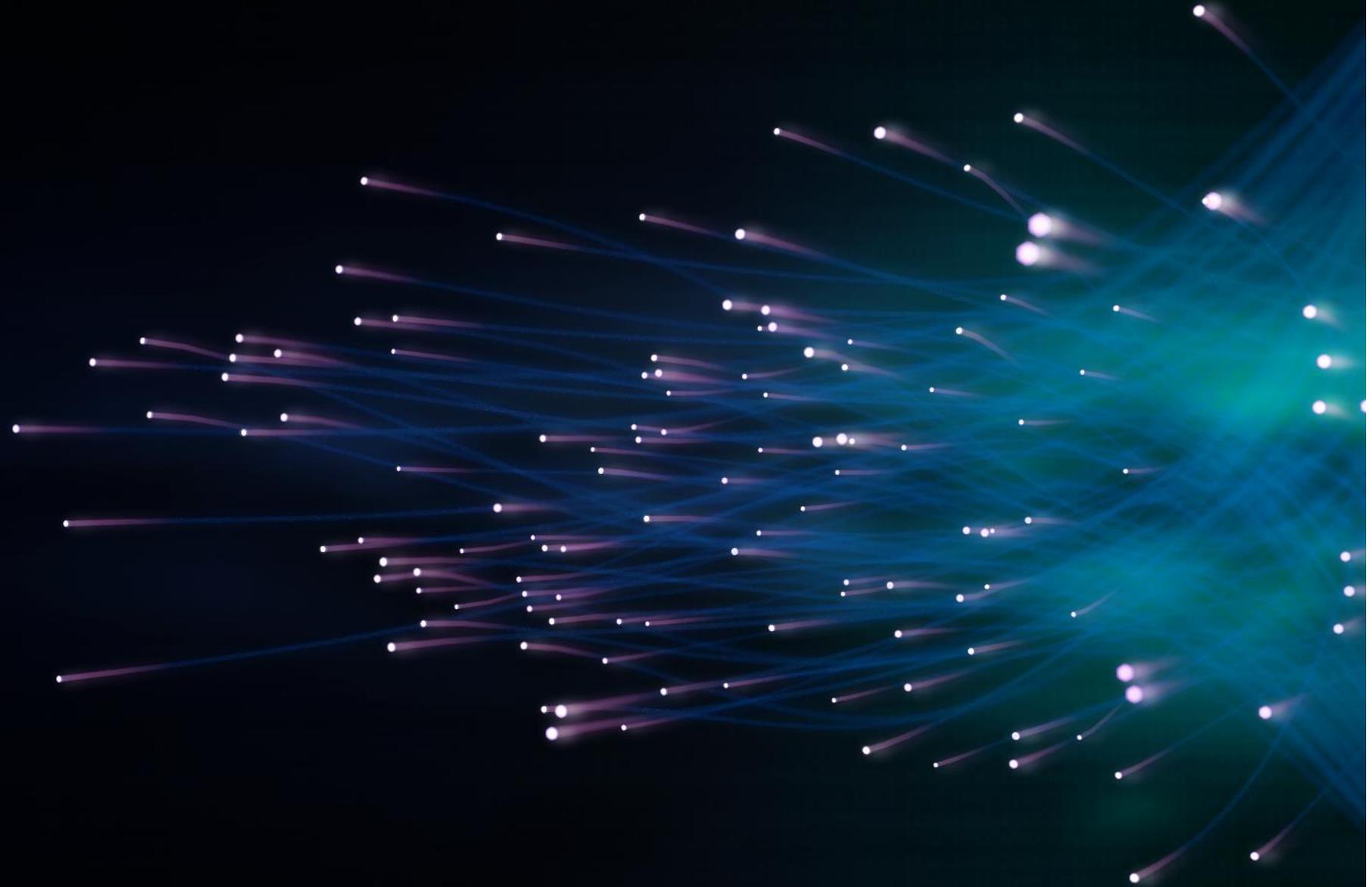
**Additional
category
and sub-
category
splits**

**More
granular %
online sales
and risk
tolerance
levels**

**Sustained
(long-term)
effects
enhancement**

**Multiple
suggestions
around core
output**

DEMO



Granularity of inputs & results

Category

All categories ▾ ⓘ

Please Choose...

All categories ⓘ

Automotive ⓘ

FMCG ⓘ

FMCG - Food ⓘ

Finance ⓘ

Finance - Current Accounts ⓘ

Finance - Insurance ⓘ

Finance - Mortgages ⓘ

Online retail ⓘ

Online retail - Fashion ⓘ

Online retail - Non Fashion ⓘ

Retail ⓘ

Retail - Grocery ⓘ

Retail - Non Grocery ⓘ

Telecoms ⓘ

Travel ⓘ

Additional category and sub-category splits

+ Telecoms and sub-category splits

% of online sales

Please Choose... ▾ ⓘ

Please Choose...

0-10% ⓘ

11-20% ⓘ

21-30% ⓘ

31-40% ⓘ

41-50% ⓘ

51-60% ⓘ

61-70% ⓘ

71-80% ⓘ

81-90% ⓘ

91-100% ⓘ

Don't Know ⓘ

More granular % online sales and risk tolerance levels

10 levels vs. 4

Risk tolerance

Please Choose... ▾ ⓘ

Please Choose...

Very low ⓘ

Low ⓘ

Medium ⓘ

High ⓘ

4 levels vs. 2

New functionality – multiple budget suggestions around core scenario



New functionality – multiple risk suggestions around core scenario



The logo for thinkbox, featuring the word "thinkbox" in a white, lowercase, sans-serif font. A small white square is positioned above the letter "x". The logo is centered within a light blue circular background.

thinkbox

Thank You

WPP powered by

**GAIN
THEORY**

MEDIACOM

Wavemaker

MINDSHARE

Are you normal?

thinkbox 

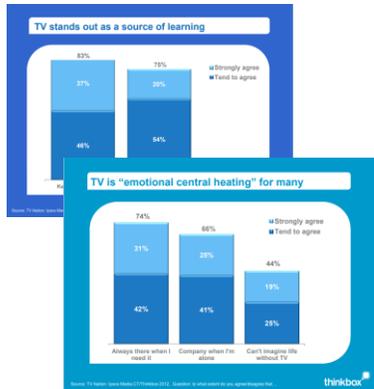
It's been six years since the last wave of our landmark study exploring differences between the public and the ad industry

2016 key findings:

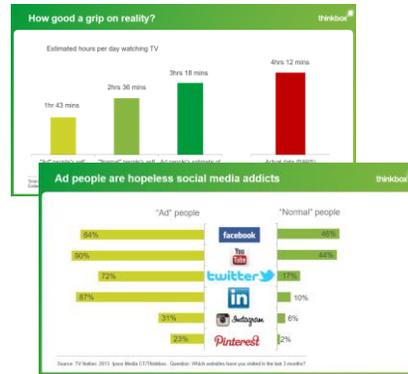
TV set remained the most popular device (**92%**)

Ad Nation were **3x** more likely to watch shows on Netflix

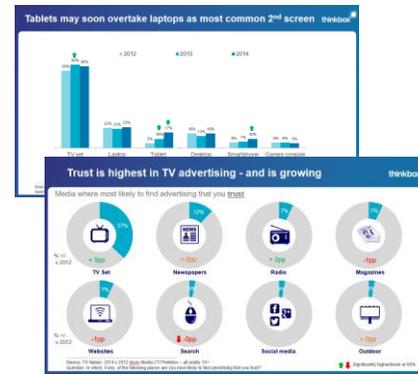
The ad industry overestimated device usage by some margin



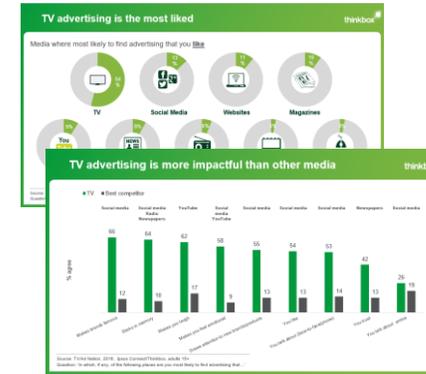
2012



2013

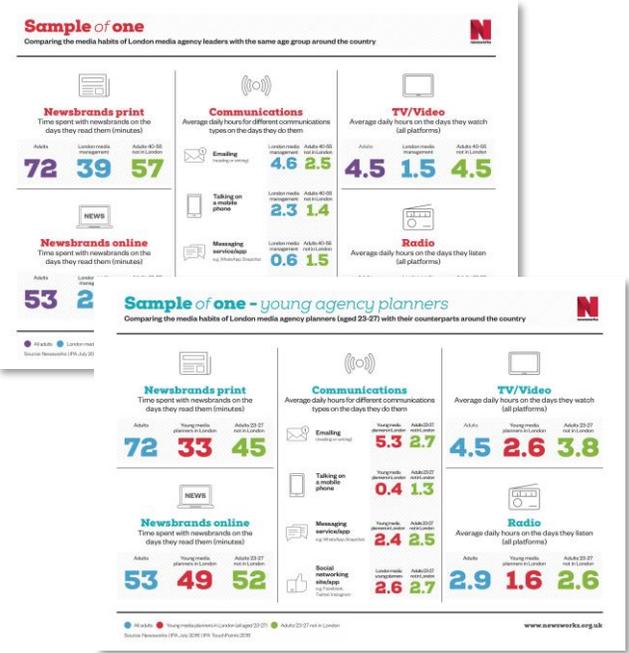


2014

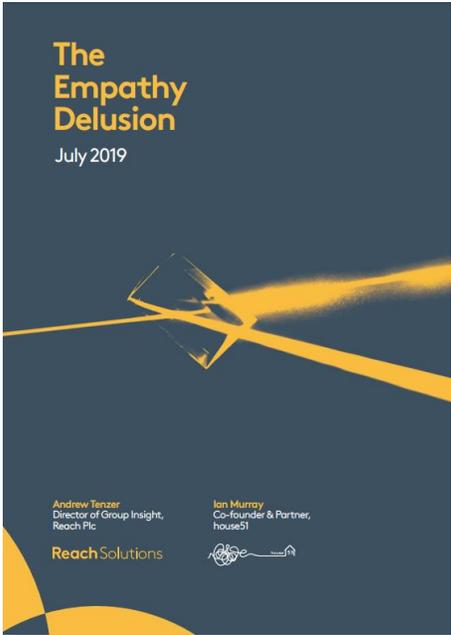


2016

Other ad industry studies have also delved into this topic



‘Sample of one’
February 2018



Reach Solutions

‘The Empathy
Delusion’
July 2019

The last time we ran this study...

EU Referendum



Two Prime Ministers



President Trump



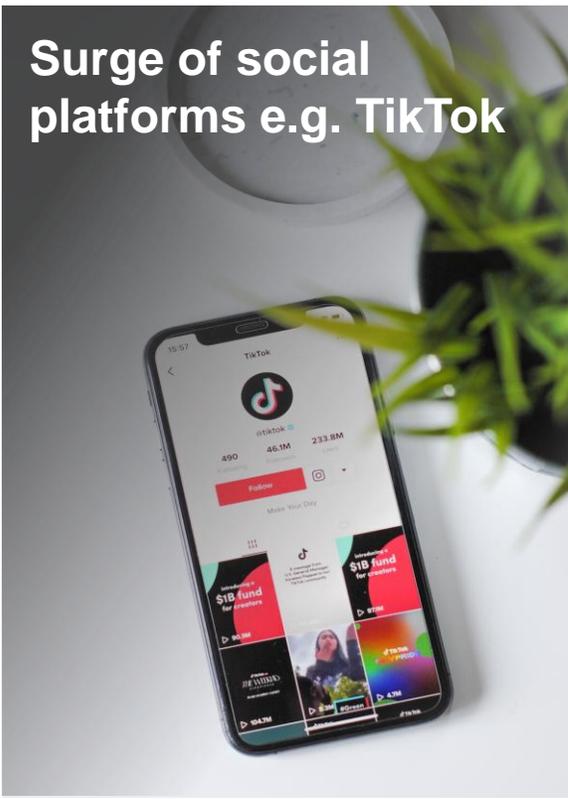
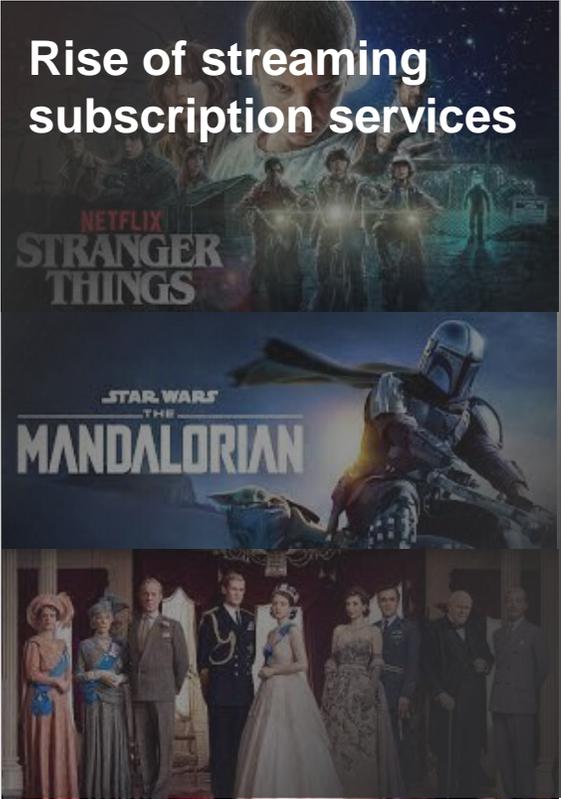
Rio Olympics



Rise of Pokémon Go

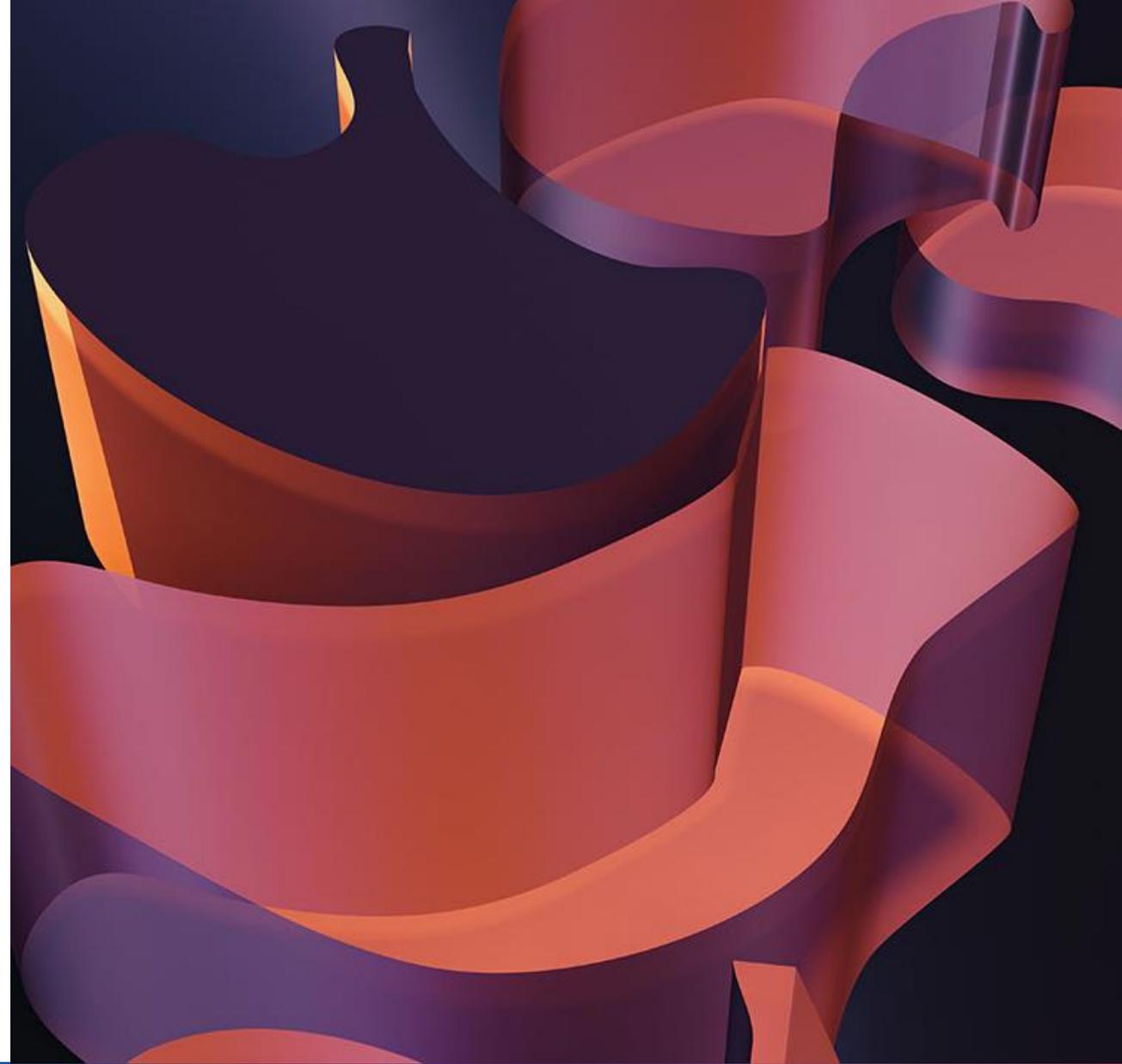


More recently, the industry has evolved and adapted to changing times



Our brief to Ipsos

- Has the chasm between the media consumption habits of the British public and media professionals changed?
- Has the way in which we consume TV content evolved?
- Have media professionals improved their understanding of consumer behaviour?
- What impact has the Covid pandemic had on media consumption habits?



TV and Ad Nation:

A snapshot of the media landscape in 2022

Prepared by Ipsos UK for Thinkbox

What we did:

TV Nation

- UK nationally representative survey
- 1,158 responses
- 10th – 16th June, 2022
- Claimed attitudinal and behavioural data regarding:
 - TV content viewership
 - Device / platform usage
 - Perceptions of advertising
 - Evolution of content consumption compared to pre-pandemic

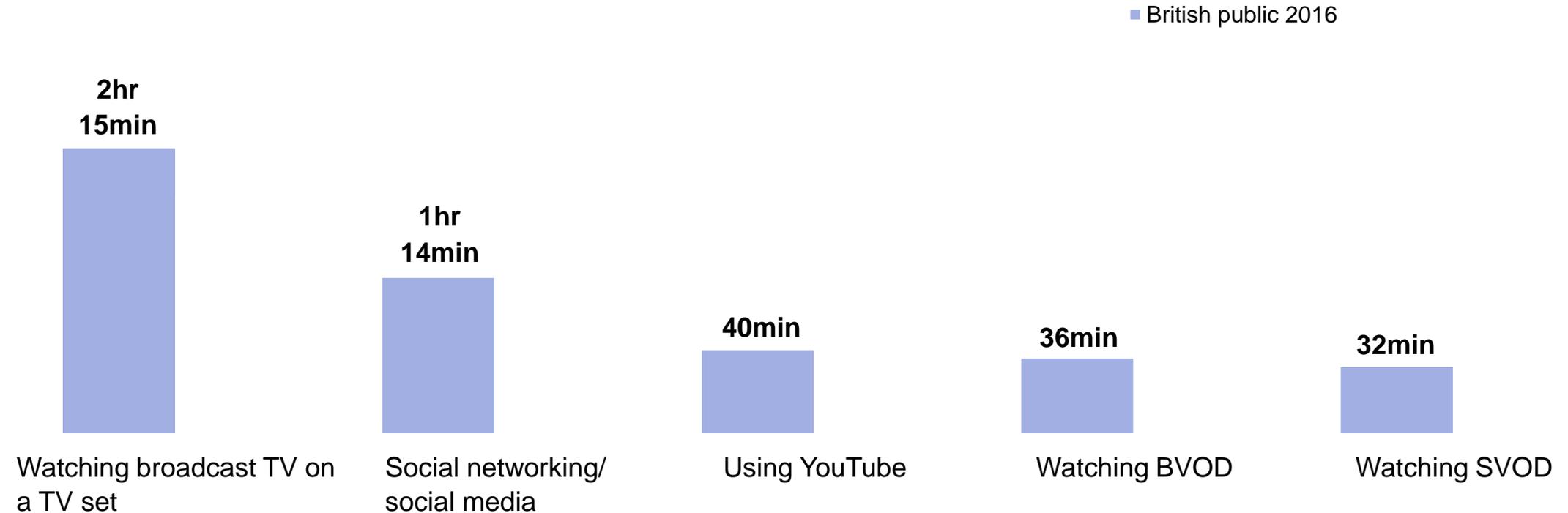
Ad Nation

- Voluntary response survey:
 - ALF Database
 - Named contacts within the marketing/advertising industry
 - Individuals who work for media owners or marketing trade bodies were excluded.
- 216 responses
- 20th June – 1st August, 2022
- Questions to mirror TV Nation
- Additional questions were asked regarding respondents' perceptions of how the British public engage with the above.

A snapshot of media consumption in 2016

How was the British public spending their time in 2016?

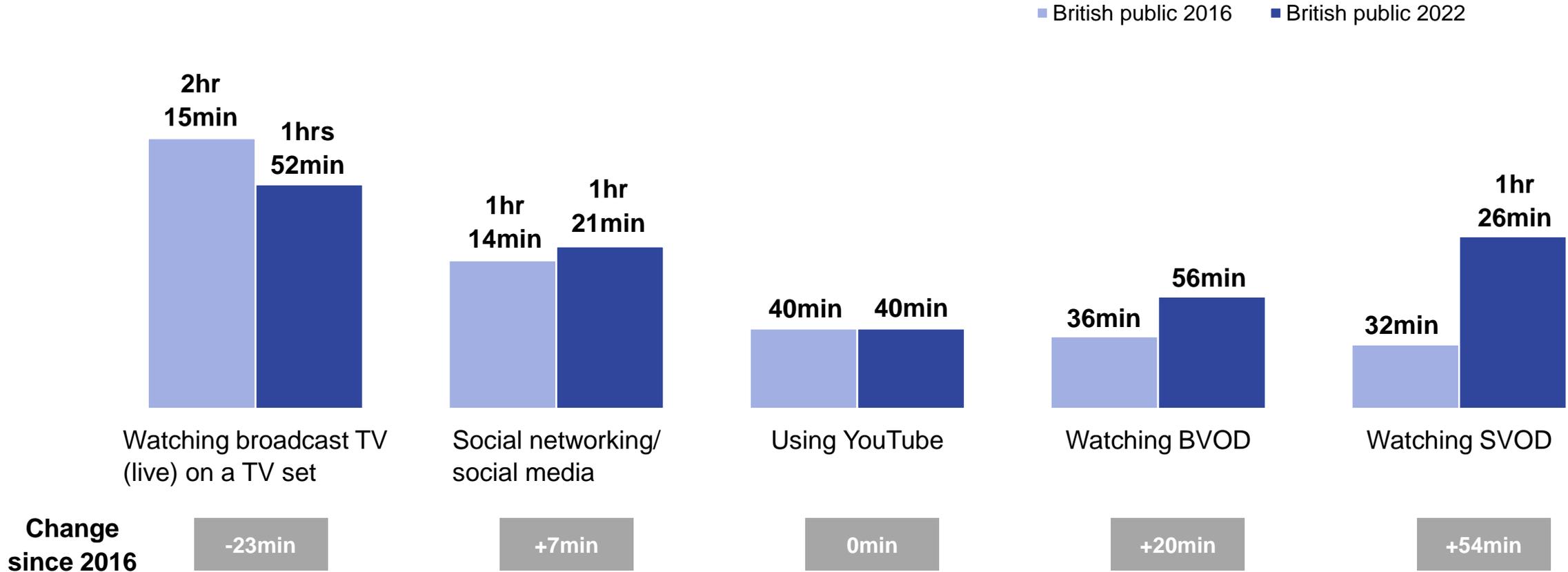
Mean length of time per day spent doing activity



TN20: In an average day, approximately how much time do you spend doing the following activities?
Base: All who ever watch TV content (2022 = 1,123; 2016 = 795)

How is the British public spending their time now?

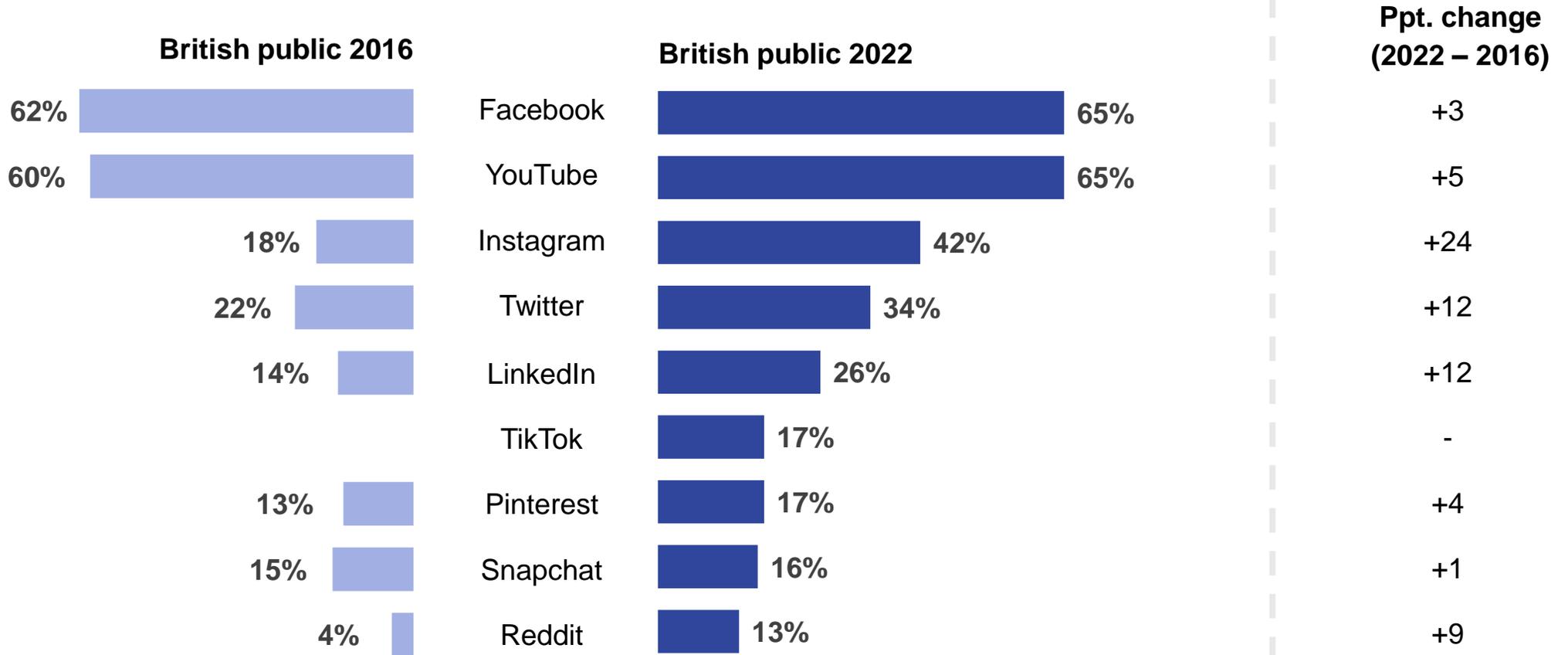
Mean length of time per day spent doing activity



TN20: In an average day, approximately how much time do you spend doing the following activities?
Base: All who ever watch TV content (2022 = 1,123; 2016 = 795)

How has social media penetration changed since 2016?

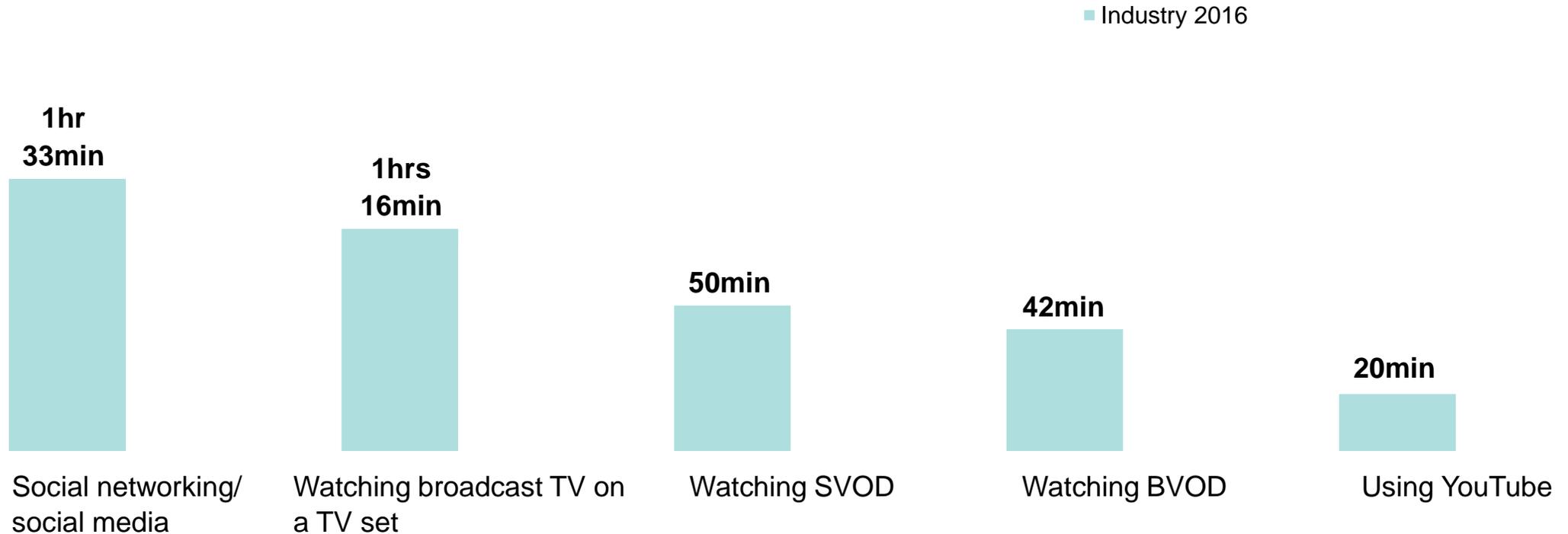
% who accessed website/service/app in past 3 months



TN21. Which, if any, of the following websites, apps or services have you visited or used in the last 3 months?
Base: All who ever watch TV content (2022 = 1,123; 2016 = 795)

What was the industry doing in 2016?

Mean length of time per day spent doing activity

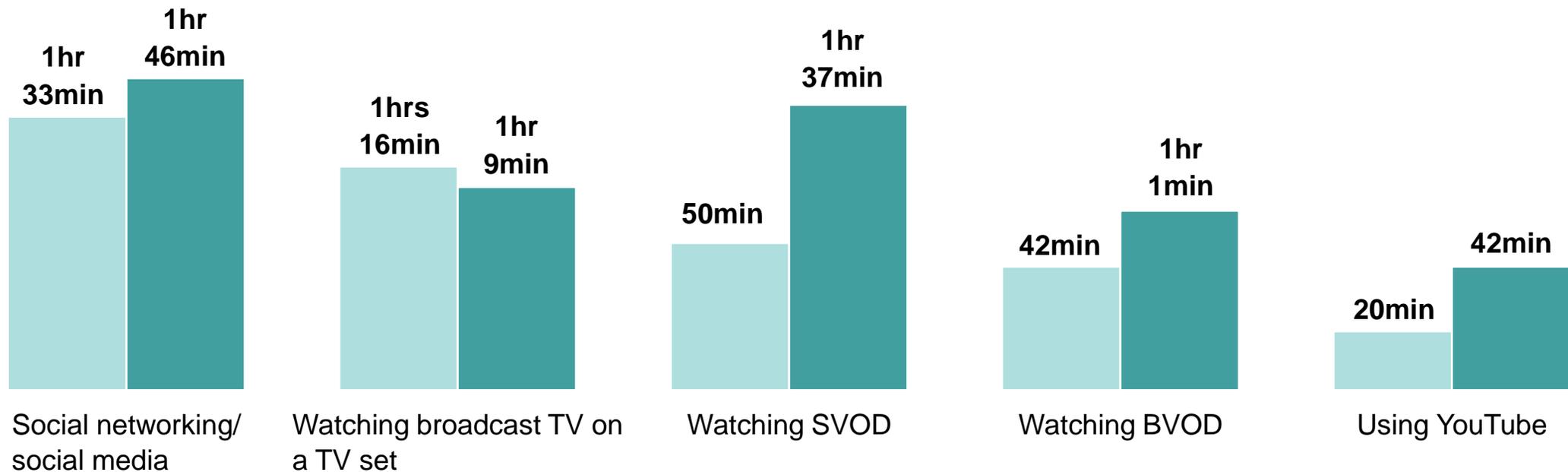


AN20: In an average day, approximately how much time do you spend doing the following activities?
Base: All who ever watch TV content (2022: 216; 2016: 288)

What is the industry doing now?

Mean length of time per day spent doing activity

■ Industry 2016 ■ Industry 2022



Change since 2016

+13min

-7min

+47min

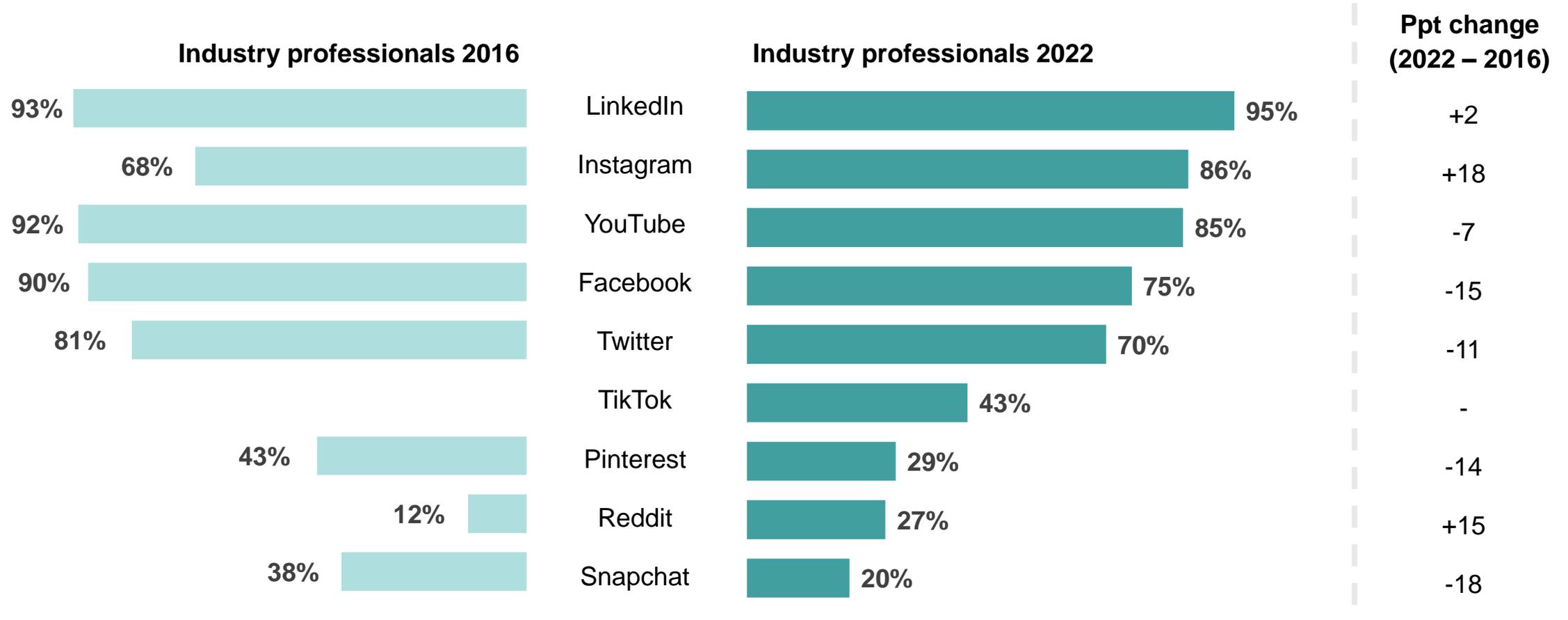
+19min

+22min

AN20: In an average day, approximately how much time do you spend doing the following activities?
Base: All who ever watch TV content (2022: 216; 2016: 288)

How has Industry social media penetration changed since 2016?

% who accessed website/service/app in past 3 months



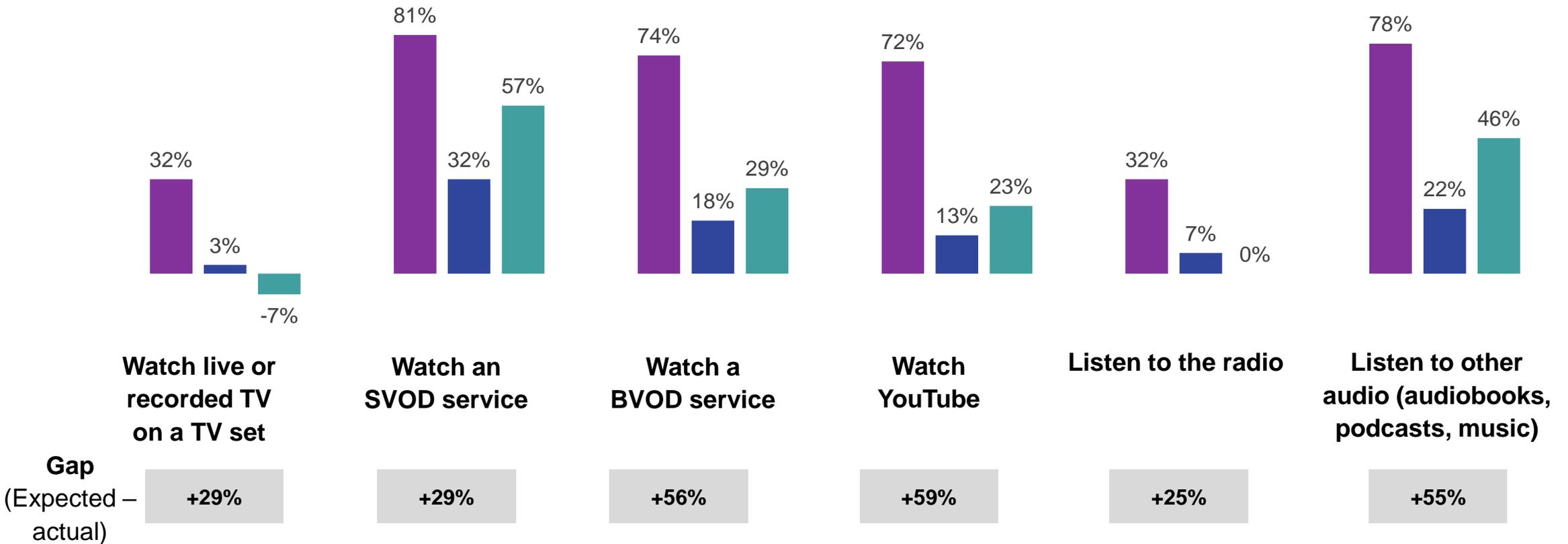
AN21. Which, if any, of the following websites, apps or services have you visited or used in the last 3 months?
 Base: All who ever watch TV content (2022: 216; 2016: 288)



How has the pandemic changed us (or not)?

% net change*

■ Industry expectations ■ British public ■ Industry



TNAN23/23a. Thinking about now, as compared to February 2020 (prior to the start of the pandemic), how has the frequency with which you/the British public do each of the following been impacted, if at all?

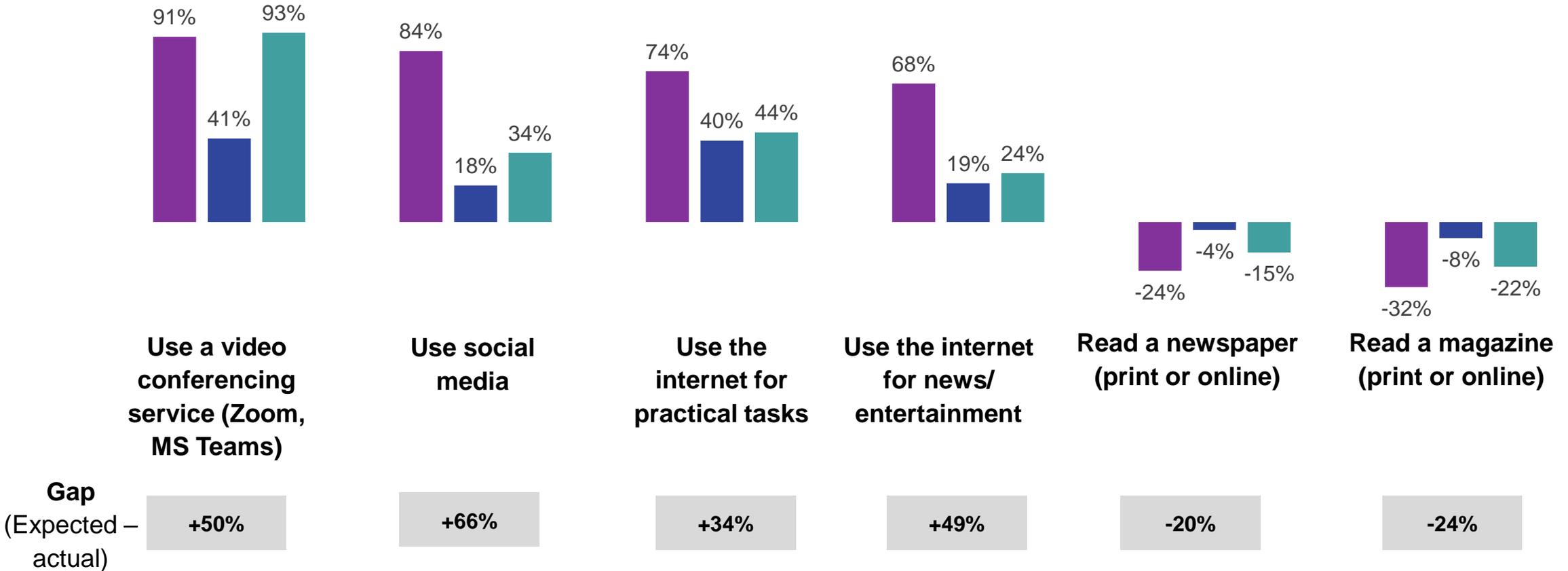
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

*Net change = % stating frequency of doing activity increased minus % stating frequency of doing activity decreased

How has the pandemic changed us (or not)?

% net change*

■ Industry expectations ■ British public ■ Industry



TN/AN23/23a. Thinking about now, as compared to February 2020 (prior to the start of the pandemic), how has the frequency with which you/the British public do each of the following been impacted, if at all?

Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

*Net change = % stating frequency of doing activity increased minus % stating frequency of doing activity decreased



How does the Industry differ from the British public?

Who did we speak to?

	 Gender	 Age	 Region
British public	Women: 53% Men: 47%	16-34: 26% 35-54: 33% 55+: 40%	Greater London: 13% Rest of UK: 87%
Industry professionals	Women: 51% Men: 49%	18-34: 48% 35-54: 41% 55+: 11%	Greater London: 49% Rest of UK: 51%

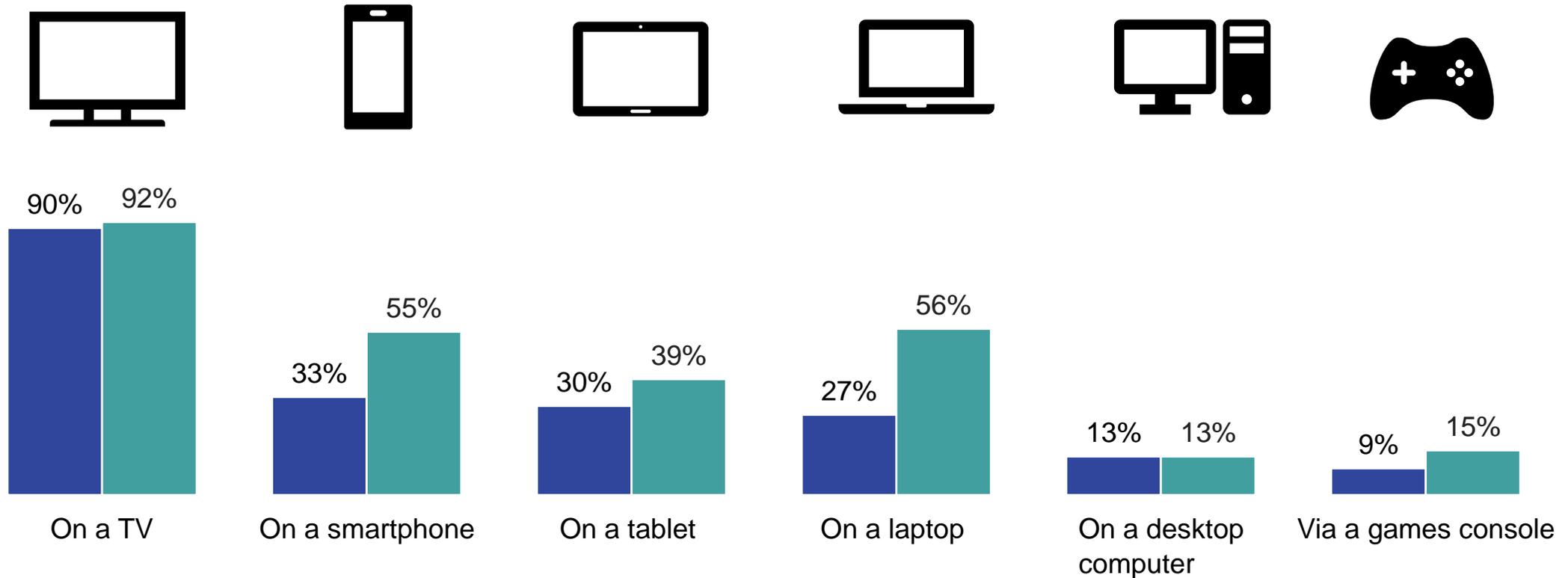
What is our sample talking about?

	1	2	3	4	5
British public	Family / friends	Current affairs / politics	Work	Food / drink	TV programmes
Industry professionals	Work	Family / friends	Current affairs / politics	TV programmes	Sports/ fitness

TN/AN1: Which, if any, of these things do you talk about with other people the most? This could be either face to face, via messaging apps like iMessage or WhatsApp, on social media sites like Facebook or Twitter, or on the phone.

Base: Total (1,158)

How are they watching?



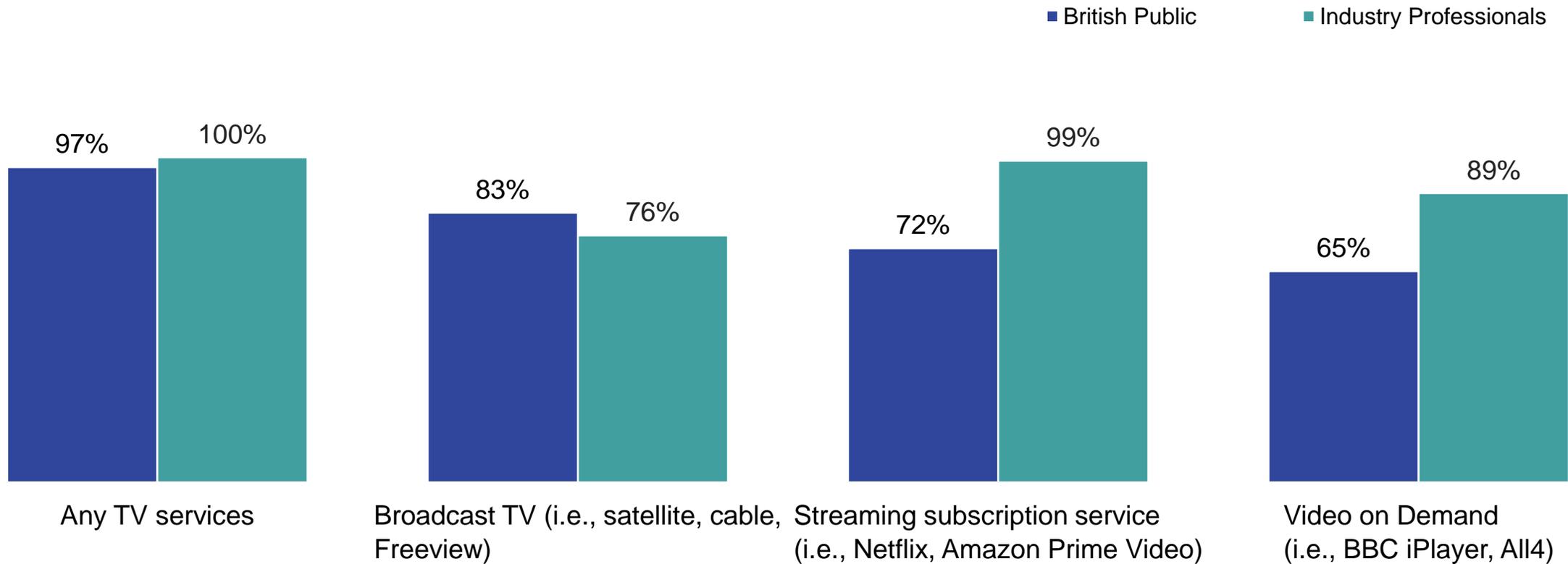
TN4/AN4. In which, if any, of the following ways do you ever watch TV content?
 Base TN4: Total (1,158); AN4: Total (216);

■ British Public ■ Industry Professionals

Which media services are most commonly accessed by the British public and Industry professionals?

Broadcast TV services were the most accessed service, with viewership distributed between satellite, cable, and Freeview

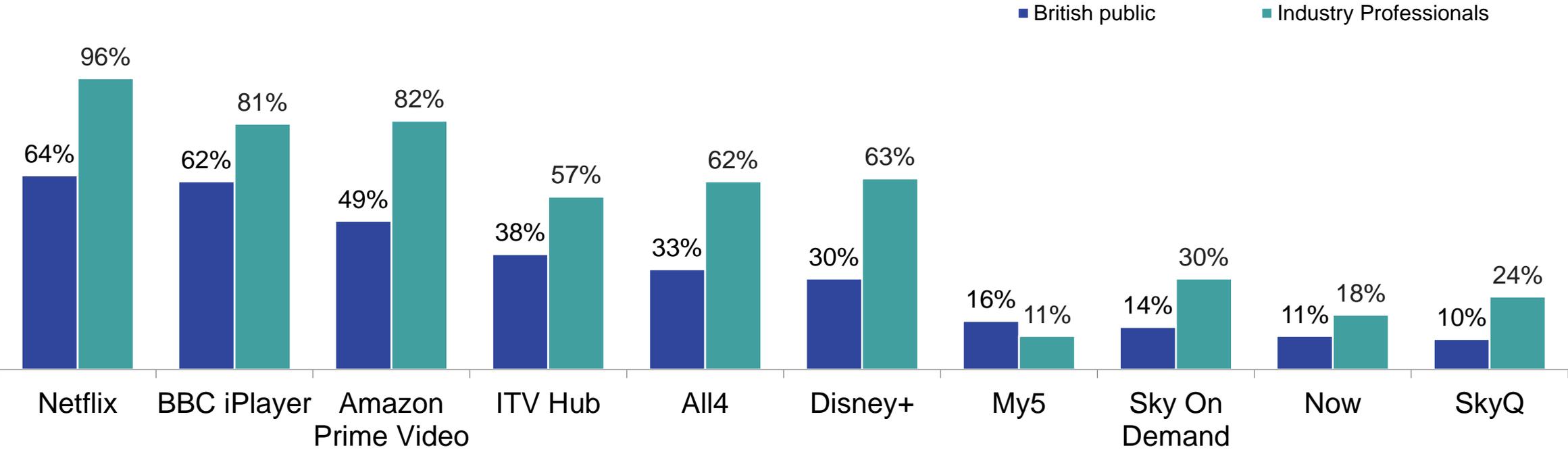
% accessing each service



TN/AN6. Which, if any, of these services have you accessed in the last 3 months?
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Which streaming services (SVoD / BVoD) are most popular?

% accessing each streaming service

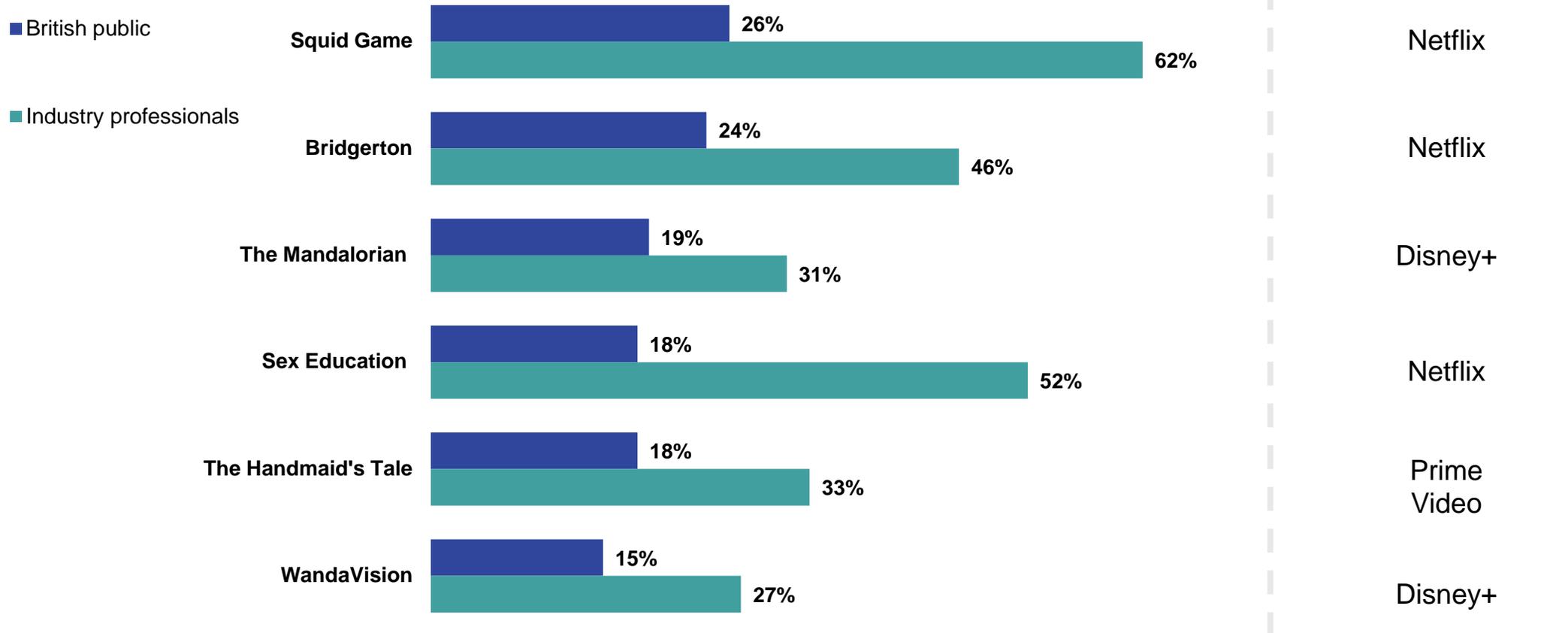


TN/AN8: And which, if any, of the following streaming services have you accessed in the last 3 months?
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)



What streaming content are they watching?

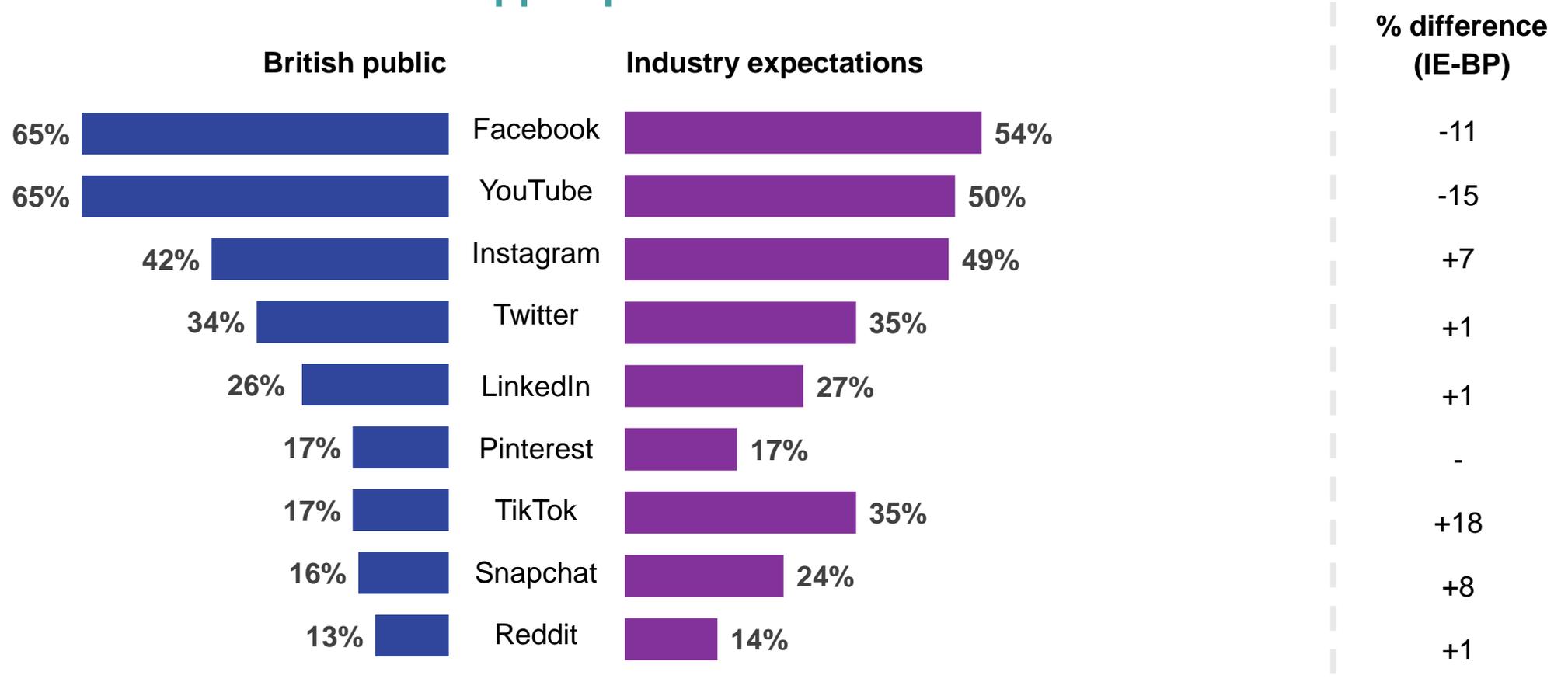
% who have watched at least one episode in the past 2 years



TN/AN10: Which, if any, of the following series have you watched at least one episode of in the last two years using a streaming service/Catch Up on demand service? (e.g. All4, ITV Hub, Netflix, Disney+)
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Claimed public social media P3M access vs Industry expectations

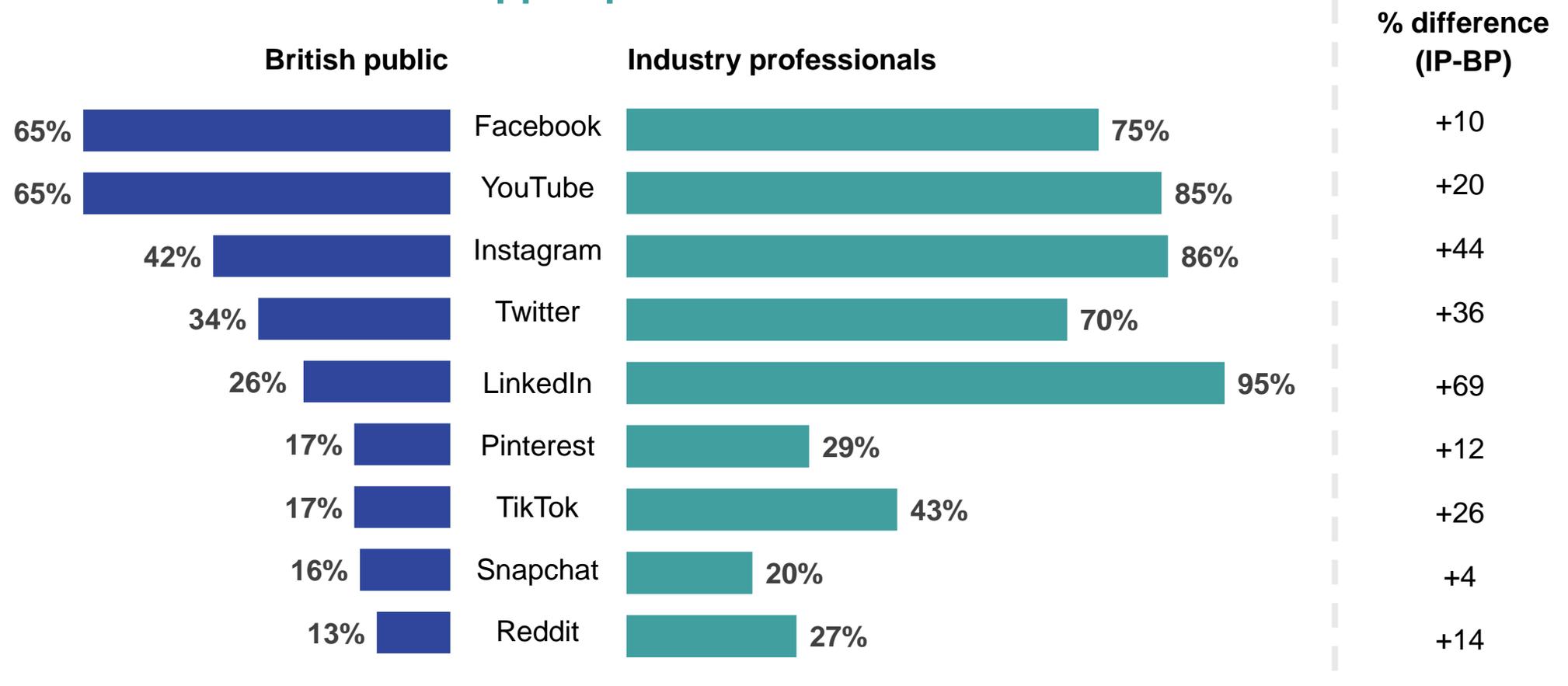
% who accessed website/service/app in past 3 months



TN21/AN21a. Which, if any, of the following websites, apps or services have you (do you think the British public have) visited or used in the last 3 months?
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Claimed public social media P3M access vs claimed Industry P3M access

% who accessed website/service/app in past 3 months



TN/AN21. Which, if any, of the following websites, apps or services have you visited or used in the last 3 months?
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)



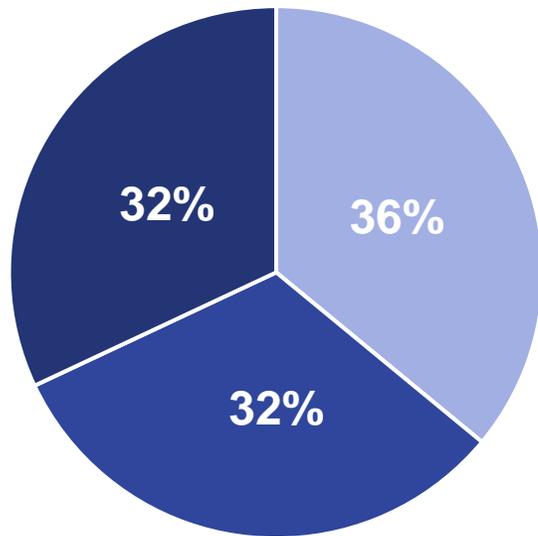
A man with glasses and a beard, wearing a striped t-shirt and jeans, is sitting on a light-colored sofa. He is smiling and looking at a smartphone in his right hand, while holding a black remote control in his left hand. The background is a simple, bright room with a potted plant on the right.

How do the British public and the Industry divvy their attention?

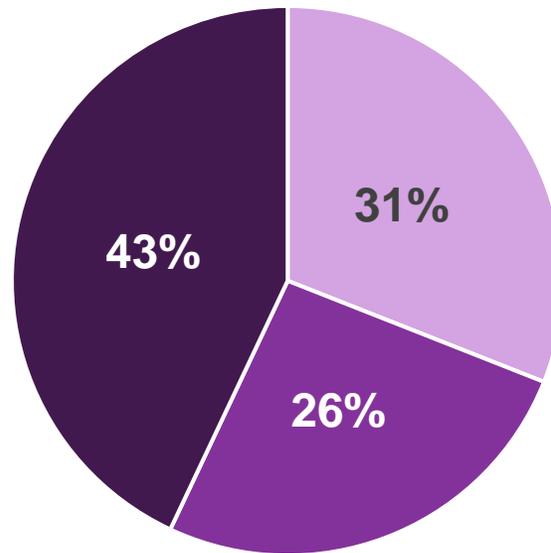
What proportion of time is spent watching different TV content services?

% of time spent watching each form of content

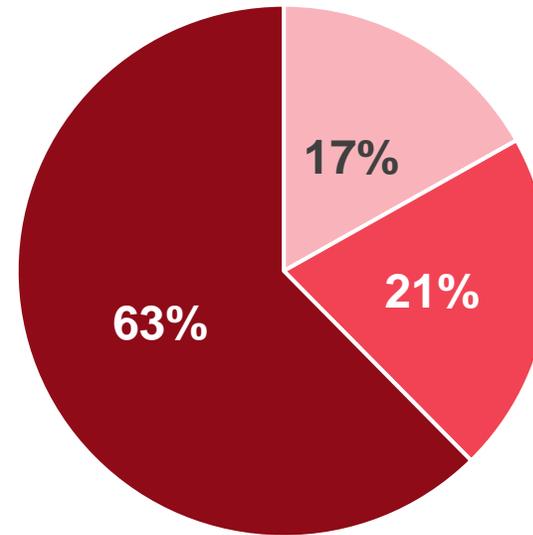
British public



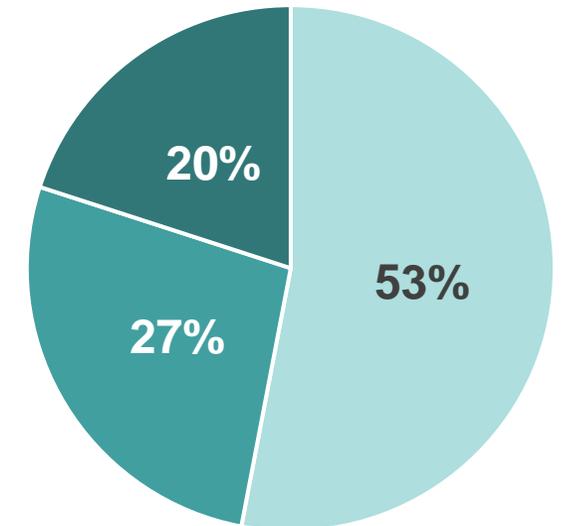
Industry expectations



Actual – BARB Q2



Industry professionals



■ Live

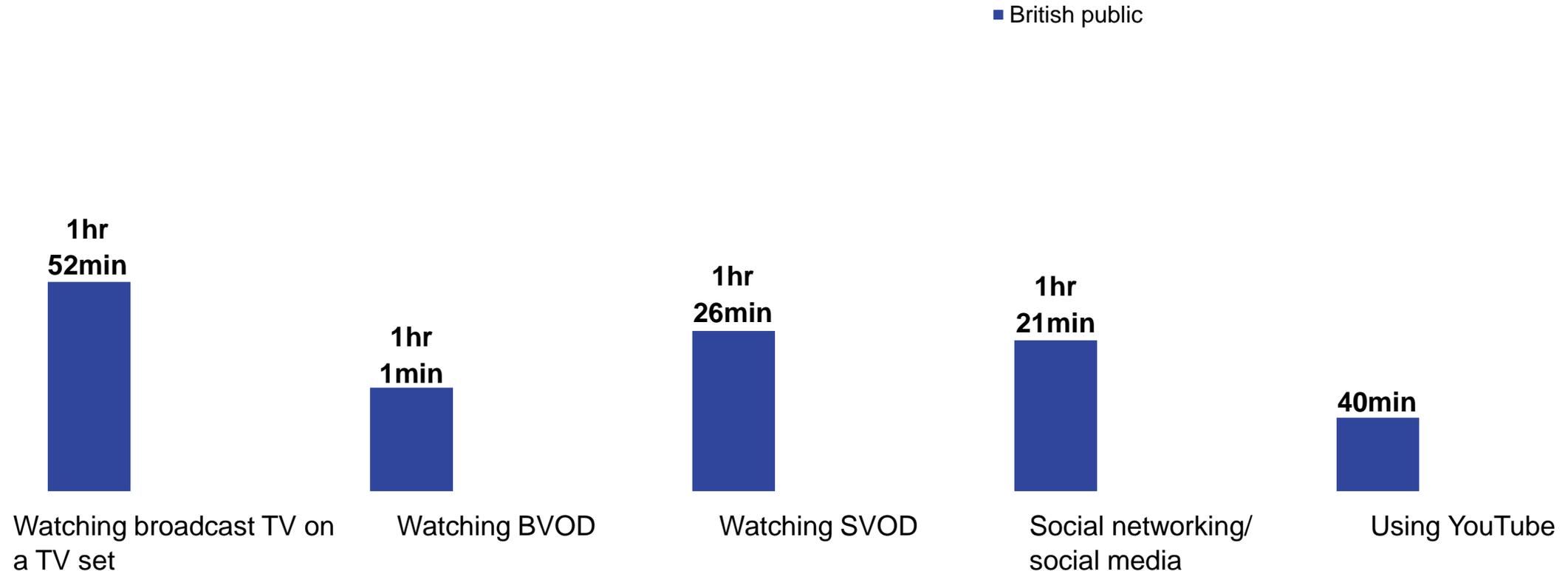
■ BVoD

■ SVoD

AN14/TN14. Of the time you (the British public) spend watching television, what proportion of that time (do you think) is spent watching...
Base: All who ever watch TV content (Ad Nation = 216; TV Nation = 1,123)
BARB, Q2 2022, Adults 16+, Online Multiple Screens Network – viewing across four screens – TV sets, tablet, PCs and smartphones

How does the British public's media consumption deviate (or not) from the Industry's expectations – and the Industry itself?

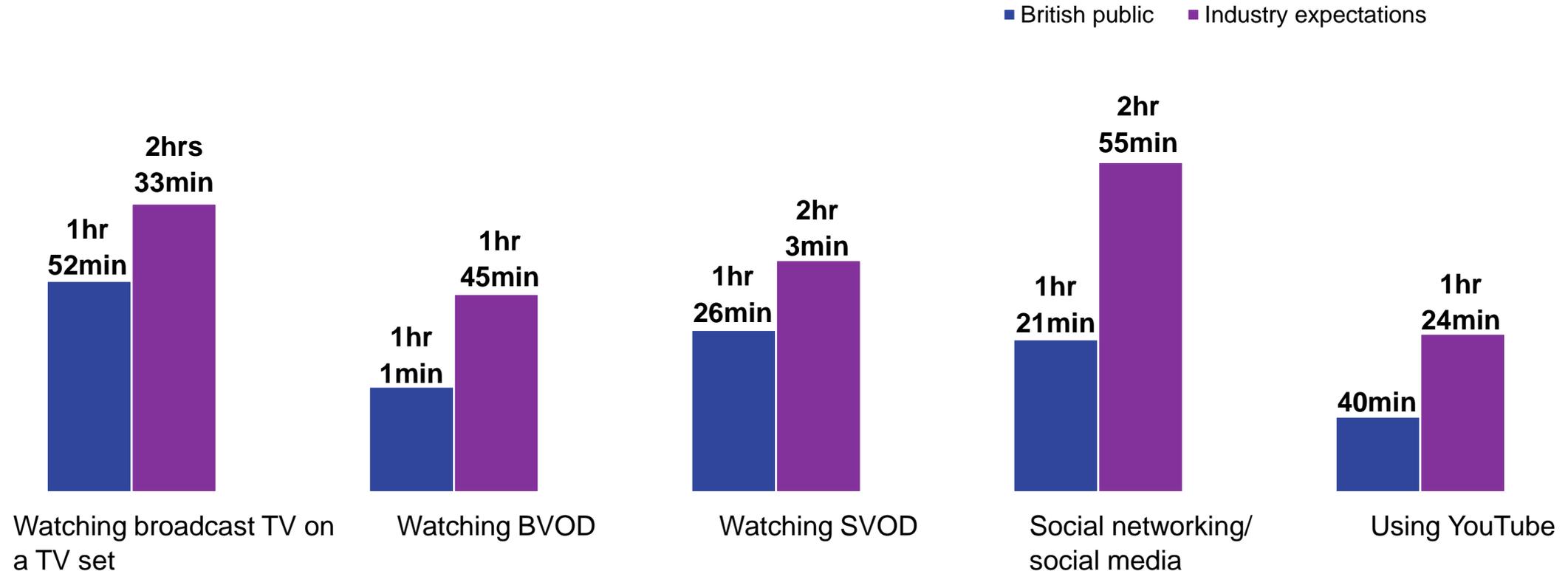
Mean length of time per day spent doing activity



TN/AN20(a): In an average day, approximately how much time do you/ think the British public spend doing the following activities?
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

How does the British public's media consumption deviate (or not) from the Industry's expectations – and the Industry itself?

Mean length of time per day spent doing activity

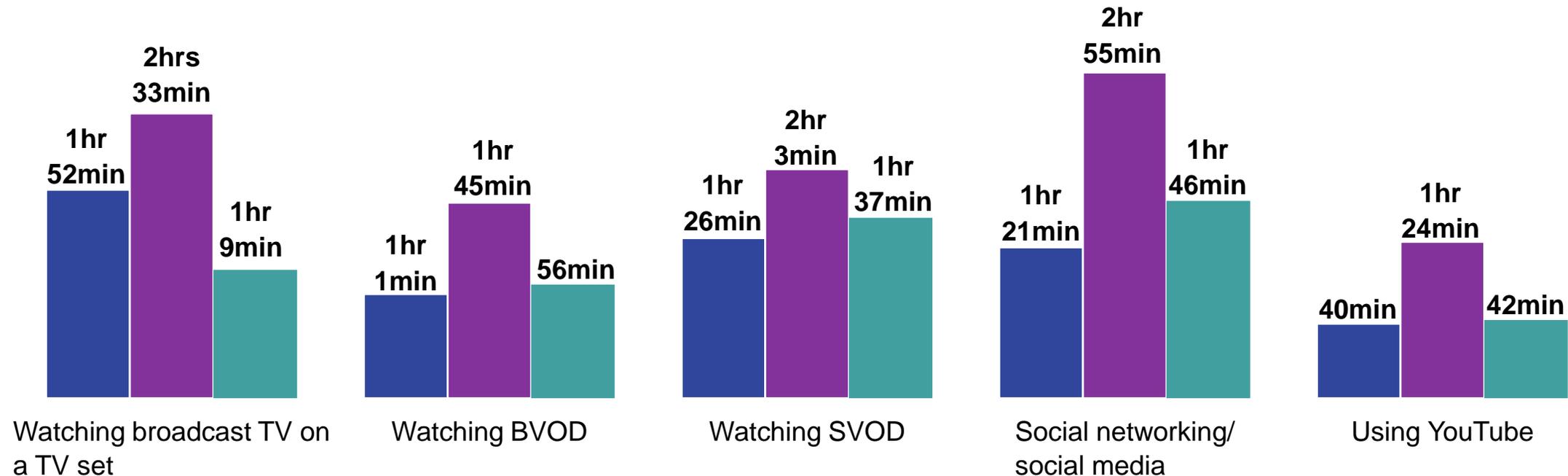


TN/AN20(a): In an average day, approximately how much time do you/ think the British public spend doing the following activities?
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

How does the British public's media consumption deviate (or not) from the Industry's expectations – and the Industry itself?

Mean length of time per day spent doing activity

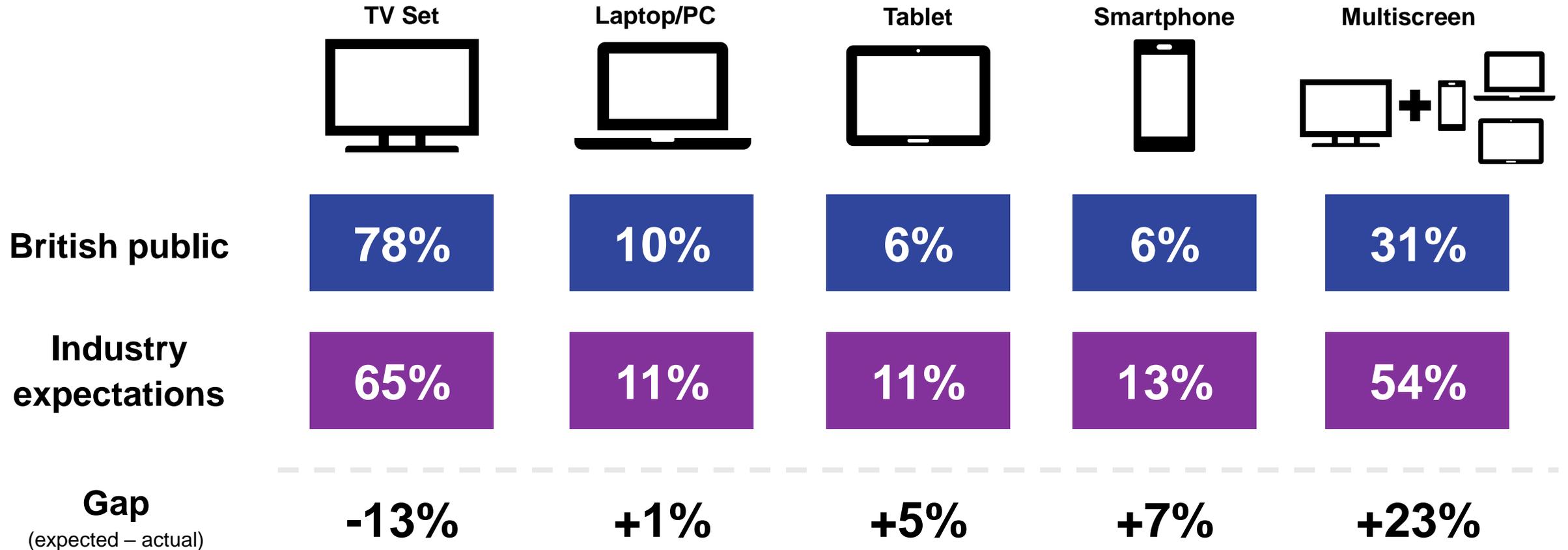
■ British public ■ Industry expectations ■ Industry professionals



TN/AN20(a): In an average day, approximately how much time do you/ think the British public spend doing the following activities?
Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

What share of time is spent watching on different devices?

% who accessed device in past 3 months



TN17/AN17a. Of the time you spend watching TV content, what proportion of that time is spent watching...

TN18/AN18a: TN18. When watching content on a TV set, for what proportion of time do you estimate you use another device (e.g. your smartphone, tablet, laptop, etc.) at the same time?

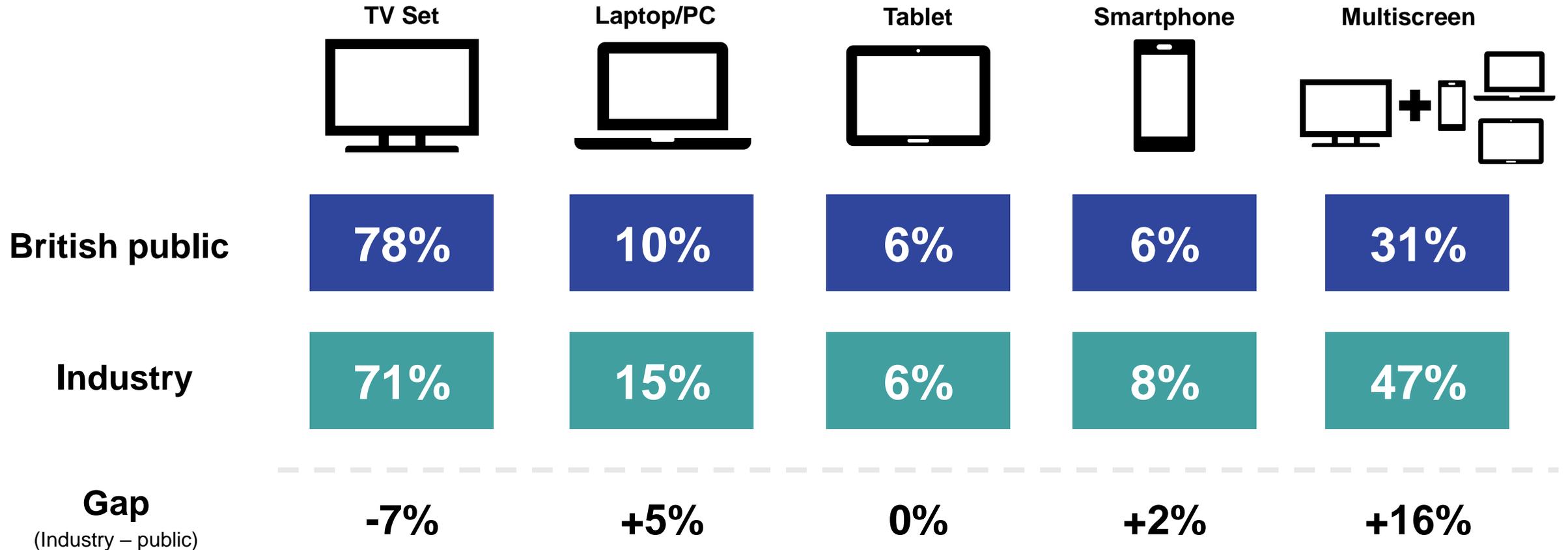
Base TN17/AN17a/AN18a: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Base TN18: All who ever watch TV content on a TV set and another device (963)

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What share of time is spent watching on different devices?

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TN17/AN17a. Of the time you spend watching TV content, what proportion of that time is spent watching...

TN18/AN18a: TN18. When watching content on a TV set, for what proportion of time do you estimate you use another device (e.g. your smartphone, tablet, laptop, etc.) at the same time?

Base TN17/AN17a/AN18a: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Base TN18: All who ever watch TV content on a TV set and another device (963)

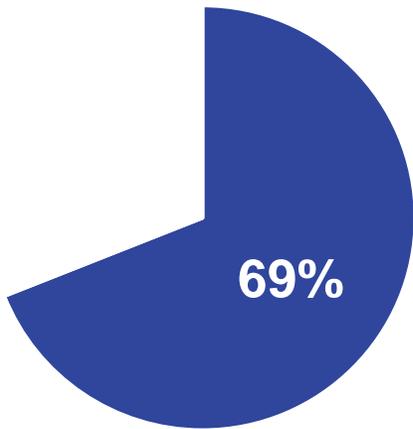
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How do the British public and the Industry engage with TV?

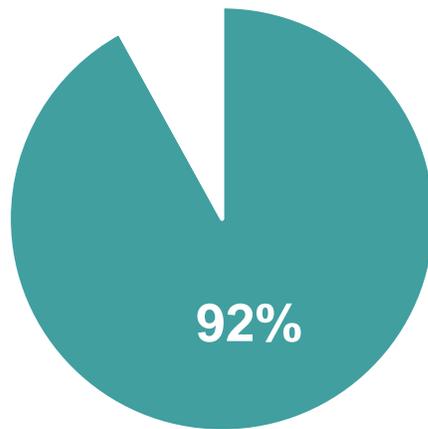


Are two screens better than one? How popular is multi-screening and why?

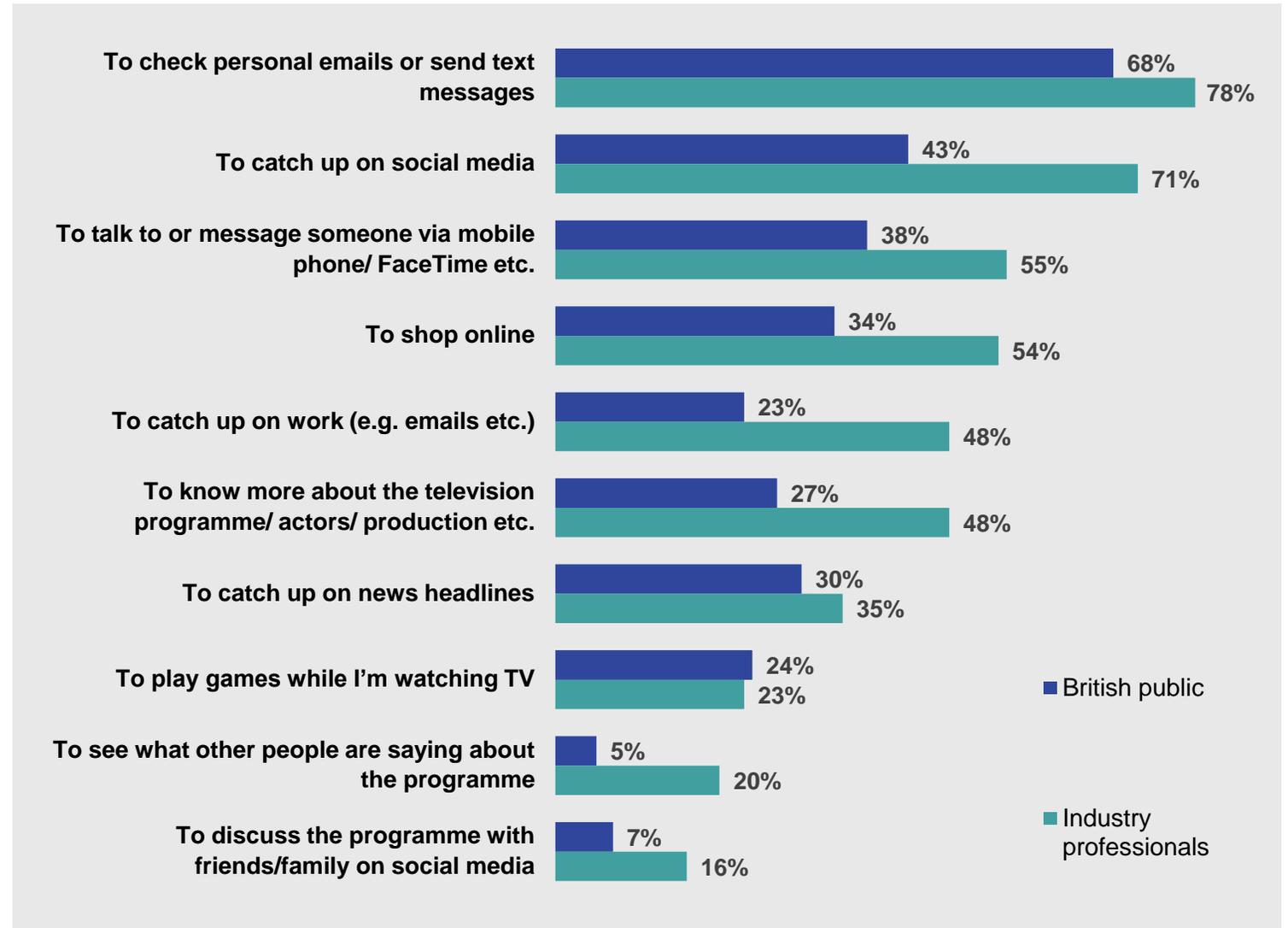
% of respondents who ever use multiple devices at once



British public



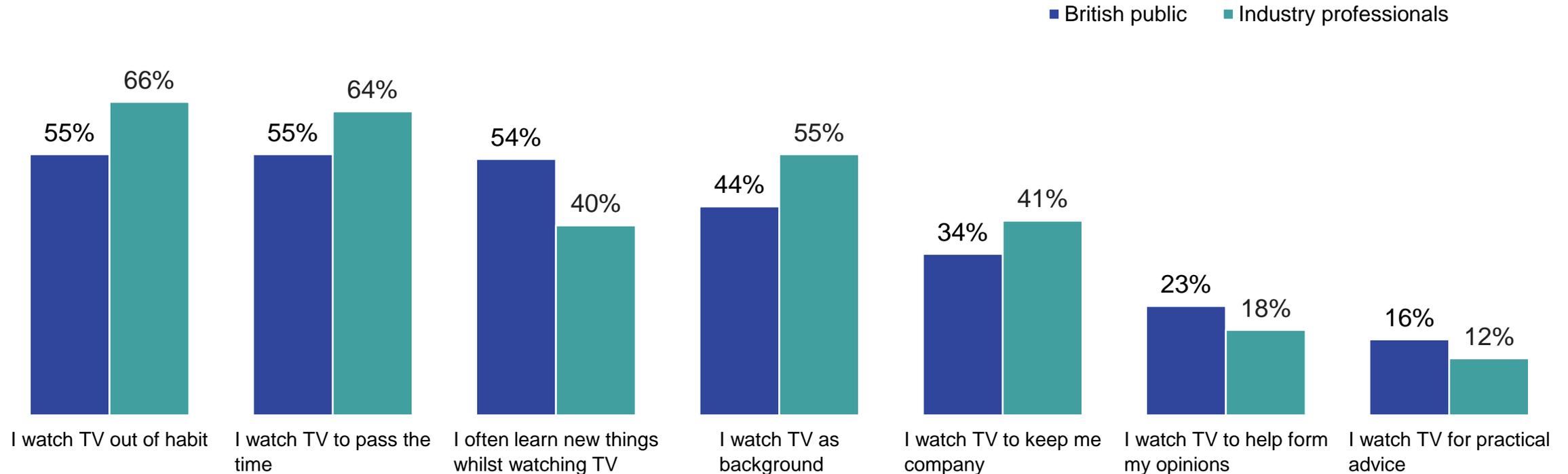
Industry professionals



TN/AN19. What are the main reasons for using another device at the same time as you are watching content on a TV set?
Base: All who ever use multiple devices at one time (TV Nation = 774; Ad Nation = 198)

What makes people want to watch TV content at all?

% agree/strongly agree



TN/AN13. To what extent do you agree or disagree with each of the following statements?
Base: All who ever use device (TV Nation = 1,123; Ad Nation = 170)



What does this mean for you?

In which, if any, of the following places are you most likely to find advertising that... you like?

In which, if any, of the following places are you most likely to find advertising that... sticks in your memory?

In which, if any, of the following places are you most likely to find advertising that... makes brands, products, or services more famous?

Where does the British public find advertising that...

% who selected each medium



TV



Social Media



Magazines



Search



Cinema



Newspapers



YouTube

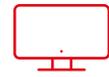
	TV	Social Media	Magazines	Search	Cinema	Newspapers	YouTube
They like	40%	27%	15%	14%	14%	12%	12%
They trust	35%	6%	12%	11%	9%	19%	4%
Makes them laugh	52%	35%	5%	4%	16%	6%	21%
Makes them feel emotional	47%	17%	5%	4%	15%	9%	10%
Sticks in their memory	57%	28%	12%	10%	12%	11%	13%
Entertains them	51%	30%	9%	9%	21%	7%	19%

TN3: In which, if any, of the following places are you most likely to find advertising that ...

Base: Total (1,158)

Where does the British public find advertising that...

% who selected each medium



TV



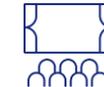
Social Media



Magazines



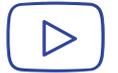
Search



Cinema



Newspapers



YouTube

	TV	Social Media	Magazines	Search	Cinema	Newspapers	YouTube
Makes brands, products or services more famous	66%	34%	19%	15%	16%	19%	16%
Provides helpful information	38%	21%	18%	31%	3%	27%	9%
They talk about with other people verbally	46%	28%	10%	11%	9%	13%	11%
They talk about with other people electronically	26%	33%	6%	9%	6%	8%	10%
Draws your attention to a new product, brand or service	49%	39%	17%	18%	10%	17%	15%

TN3: In which, if any, of the following places are you most likely to find advertising that ...

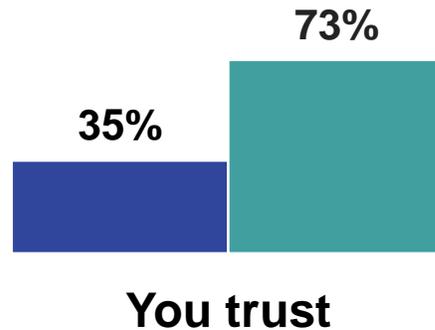
Base: Total (1,158)

Where are you most likely to find advertising that...

% who selected TV

■ British public

■ Industry professionals



1st choice	None of these	TV
2nd choice	TV	Cinema
3rd choice	News-papers	News-papers

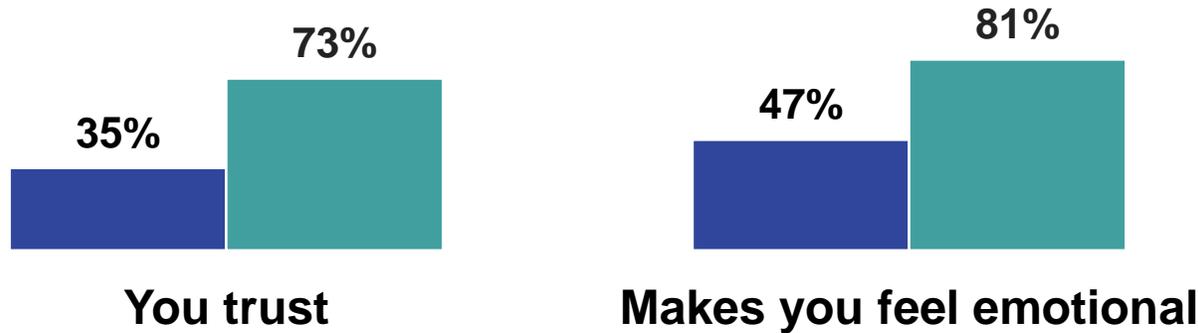
TN3/AN3a: In which, if any, of the following places are you (do you think the British public are) most likely to find advertising that ...
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Where are you most likely to find advertising that...

% who selected TV

■ British public

■ Industry professionals



1st choice	None of these	TV
2nd choice	TV	Cinema
3rd choice	News-papers	News-papers

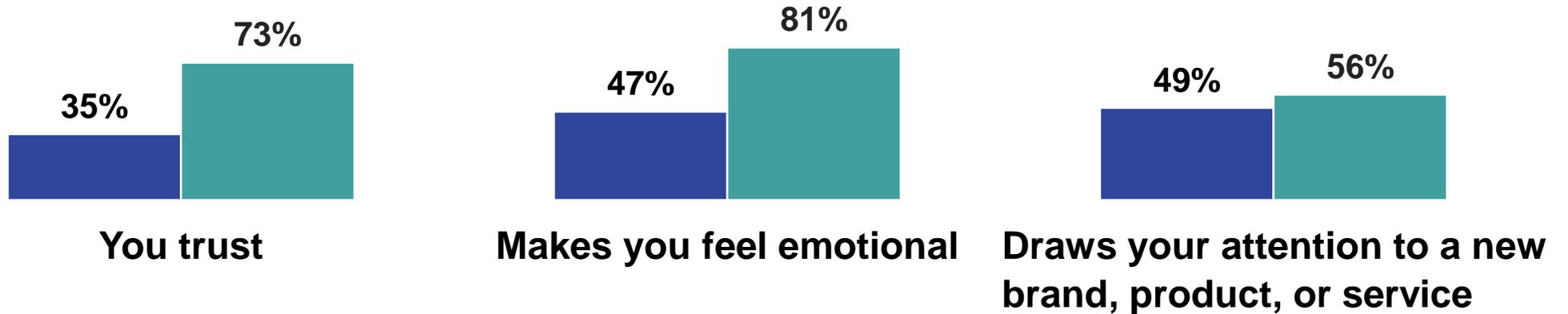
TV	TV
None of these	Cinema
Socials	YouTube

TN3/AN3a: In which, if any, of the following places are you (do you think the British public are) most likely to find advertising that ...
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Where are you most likely to find advertising that...

% who selected TV

■ British public ■ Industry professionals



Choice	British public	Industry professionals
1 st choice	None of these	TV
2 nd choice	TV	Cinema
3 rd choice	News-papers	News-papers

Choice	British public	Industry professionals
1 st choice	TV	TV
2 nd choice	None of these	Cinema
3 rd choice	Socials	YouTube

Choice	British public	Industry professionals
1 st choice	TV	Socials
2 nd choice	Socials	TV
3 rd choice	Search	OOH

TN3/AN3a: In which, if any, of the following places are you (do you think the British public are) most likely to find advertising that ...
 Base: All who ever watch TV content (TV Nation = 1,123; Ad Nation = 216)

Three things to take away:

Your ability to gauge the public's media consumption habits has improved since we last ran this study – well done!

1

Broadcast TV remains an active and influential part of the public's lives – it continues to be the medium that respondents claim to spend the most time watching on an average day.

2

Advertising on TV is the is thought to drive meaningful outcomes by a larger share of the public than other mediums – including making brands more famous/introducing new brands.

3

Thank you.

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