



TouchPoints Launch

2024



IPA Public Wi-Fi
Password: Peoplefirst23

Keynote

Richard Huntington

Chief Strategy Officer, Saatchi & Saatchi London

SAATCHI & SAATCHI

Hello

The relentless pursuit of reality





WHAT THE **FUCK** IS GOING ON?

by SAATCHI & SAATCHI



Worried
Tired
Desperate for hope



'They've started putting security tags on cheese. Is that what we have become?'

Angela, Bristol
WTF 2023

What about those
with a little more?

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The middle class

Earn income
Pay income tax

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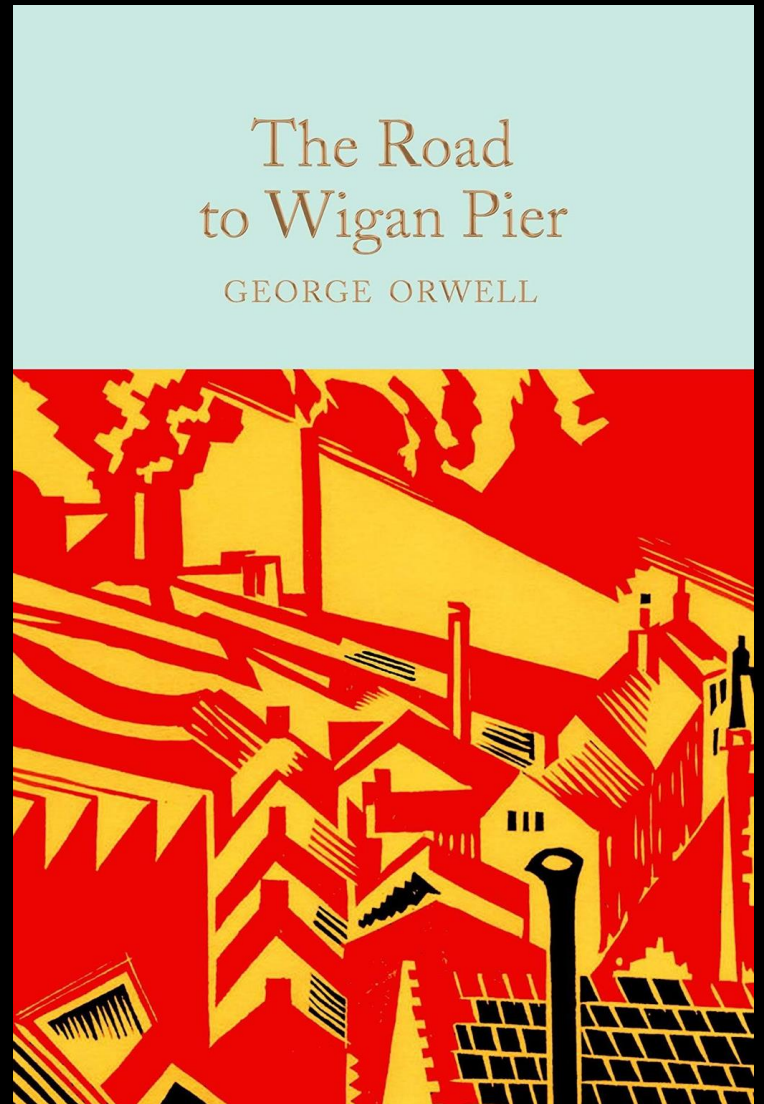
Heartland



'A thriving middle class is not the result of a prosperous economy, it is the prerequisite to it.'

Eric Liu and Nick Hanauer,
The Gardens of Democracy

A journey
through
the heartland
this spring



Leith
Antrim
Hetton le Hole
Harrogate
Huddersfield
Alderley Edge
Dolau
Dudley
Hitchin
Arnos Grove
St Ives



'Every year is getting shorter, never seem to find the time
Plans that either come to naught, or half a page of
scribbled lines
Hanging on in quiet desperation is the English way
The time is gone, the song is over, thought I'd something
more to say'

Pink Floyd, *Time*



73%

feel life is less enjoyable
and more financially
challenging than 10
years ago



1. Work doesn't pay

Inflation and interest rates sitting
in a tree K.I.S.S.I.N.G.

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58%

have a side hustle
for extra cash

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2. University challenged



SYLUGSTER McMONKEY McBEAN'S STAR-BELLY SNOETCH MACHINE

Dr. Seuss

“

‘I wish I'd had the option to do apprenticeships for the career I want. I would have definitely done better in those, but unfortunately they still need that piece of paper.’

Rutvi, Leith

“

‘My flatmate and I are each in £92,000 of debt. It's a lot. It's a lot. The Aldi graduate program offers £40,000 in salary...I would do that tomorrow. Immediately.’

Rutvi, Leith



'I'd estimate it cost us £30,000 to support my son through university... and his loan now stands at £70,000...He's quite resentful. He calls us baby boomers. That's his favourite thing. He's got a real chip on his shoulder about boomers. He thinks that we had it all and they've got nothing. He's very angry. He is quite bitter about it.'

Adrian, Harrogate

42%

believe that a university
degree leads to better
prospects and opportunities



'Universities are first
and foremost
corporate
enterprises.'

The Jarratt Report, 1985

3. Bitten by the hand that feeds them

“

‘The middle class feel let down by the social contract; they abide by the law, but when they need help, where the fuck is it.’

Nick Ferrari

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by SAATCHI & SAATCHI





'I have been raising her on my own since she was four. She's still living with me. You know what it's like, they've got no money, they can't move out. I mean, she wants to, and at the moment she's trying to get another job.'

Danny, Arnos Grove

“

‘I’ve no time for them at all..I don’t think they have changed that much, they are still institutionally racist, know what I mean?...I used to always say to my daughter growing up, police, vicars, scout leaders, teachers, they’re the people you trust the least.’

Danny, Arnos Grove

“

‘The default behaviour of the establishment is denial, disbelief, dismissiveness and delay.’

Sir Brian Langstaff, *Infected Blood Enquiry*

“

‘It doesn’t matter whether you wear a red tie, a blue tie, a yellow tie, a green tie, a pride tie. It doesn’t matter... Can you please take your tie off? Put it in the bin. Leave it in the bin. Can you then come to the table and sort the country out? Thank you.’

Andrew, St Ives

5. Whatever happened to society?

“

‘This is a dog eat dog world
and the dog has been let out
of the Kennels. There doesn’t
seem to be any kindness. I
think we are lacking in
kindness.’

Angela, Bristol, *WTF 2023*





'It's just shocking. The anger and the intolerance, and the rubbish, there's just rubbish everywhere.'

Carole, Harrogate



'It's not safe for my daughters to walk on their own in a uniform that's got the Jewish emblem because of what might happen. That's very worrying. We've never had that before.'

Sarah, Alderley Edge

Why aren't they
more angry?



'They're under attack everywhere – under attack from tax, under attack from their mortgage, under attack from law and order, they can't get dad into a hospital, so he needs care at home, they're under attack from universities. It's like they're under siege. The only thing they've got is Netflix and Amazon Prime so they can spend their nights watching Jeremy Clarkson—that's all they've got now.'

Nick Ferrari

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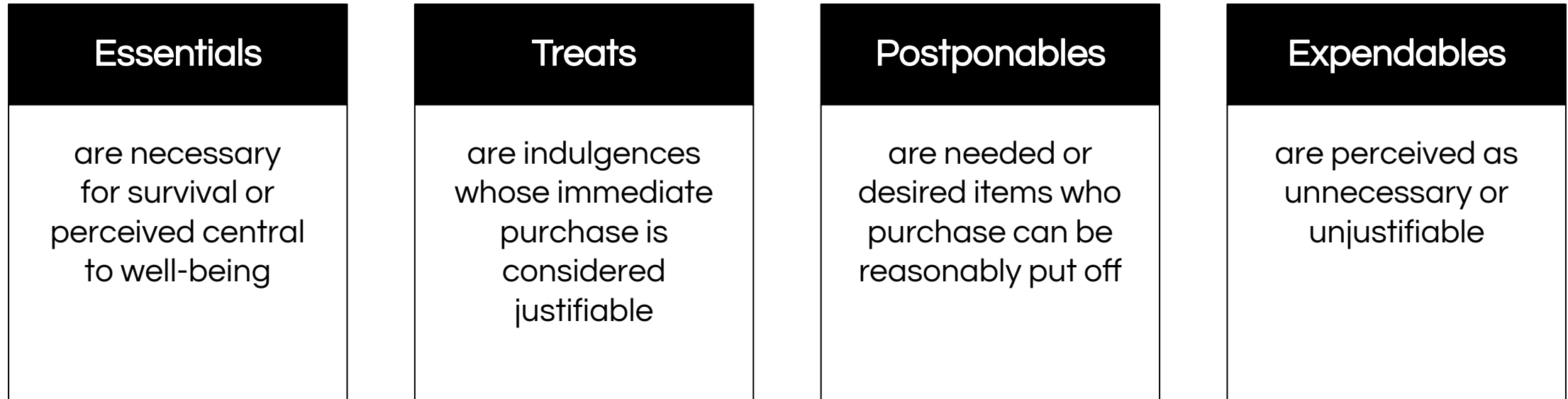


'If you're stabbed in the back say Ta
Que sera sera
Thank your lucky stars
'Cause someone, somewhere
is much worse off than you are'

Labi Siffre, Thank Your Lucky Star



6. Money follows the love



“

‘I bought myself a new helmet for the bike, relatively expensive. Something you would notice if you paid for in one hit. I paid for that over three months with Klarna.’

Nigel, Dudley



“

‘It's a bit of a ‘fuck it’ year
this year. We're all going to
L.A. and Vegas.’

Sarah, Alderley Edge

“

‘Hospitality is taking off again, people are coming out and they are willing to spend money and spend it on good food.’

Henry Dimbleby

1. Reinforce their resilience

Certainty
Confidence
Protection
Consolidation
Upgrade

2. Be their passion

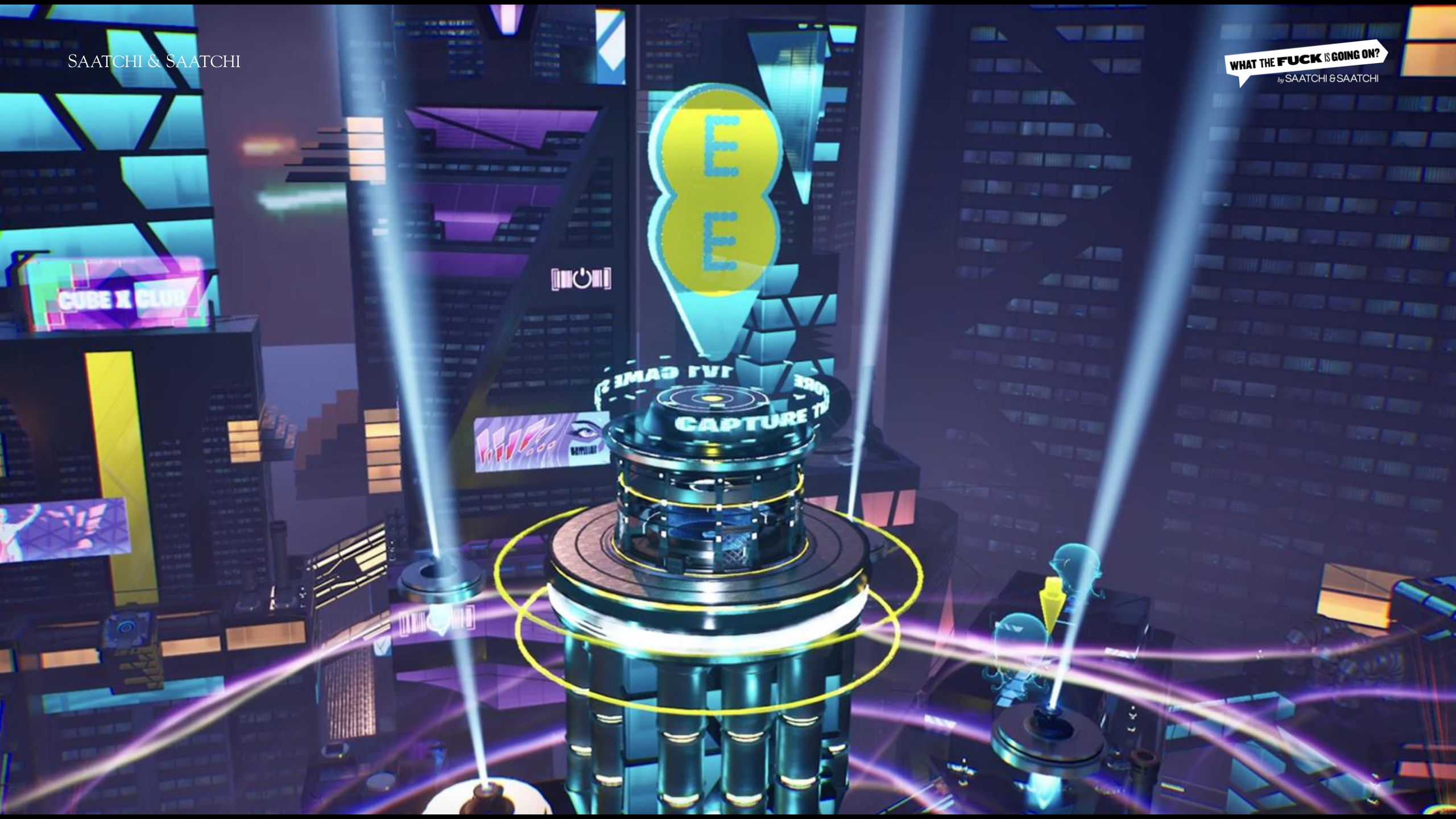
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3. Don't be afraid of the family

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WHAT THE **FUCK** IS GOING ON?
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They look different but
they feel the same

4. Make brands aspirational again

Desire

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THE
WAITROSE & PARTNERS
FARM

WHAT THE **FUCK** IS GOING ON?
SAATCHI & SAATCHI

LECKFORD ESTATE

EST. 1929

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5. Love your heartland

The middle class
aren't a joke they are
your best customers



'Everyone around, love them, love them.
Put it in your hands, take it, take it.
There's no time to cry, happy, happy.
Put it in your heart where tomorrow shines.'

R.E.M, Shiny Happy People



WHAT THE **FUCK** IS GOING ON?

by SAATCHI & SAATCHI



EssenceMediacomX Case study

Anna Martorana

Media Planning Lead, EssenceMediacomX

IPA TouchPoints 2024

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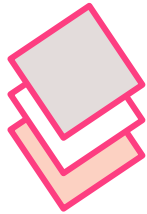
essencemediacomX

essencemediacomX

We're in a whole new communications economy



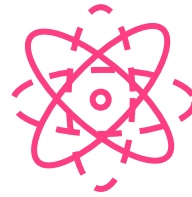
New routes to market



Converging platform capabilities



Shifting consumer behaviours



Huge explosion of data

To drive impact for brands, we need to understand audience behaviour

Continuous change is the norm, and is accelerating

Routing ourselves in audience understanding delivers breakthrough decisions

Break • through

Insight exploration which identifies a new opportunity/source of advantage for brands

**Audience
Sentiment and
mood**

**Audience patterns
of life**

**Audience media
behaviour**

**Audience trends
and change over
time**



Creating breakthroughs for brands means we need to understand consumer behaviour

**PLANNING
FOR THE NEW
COMMS
ECONOMY**

Connecting fragmented
media behavior

**TAPPING INTO
FAMILY
VALUE
MOMENTS**

Reaching families
during the Cost of Living
Crisis

**BREAKING
OUT OF THE
LONDON
BUBBLE**

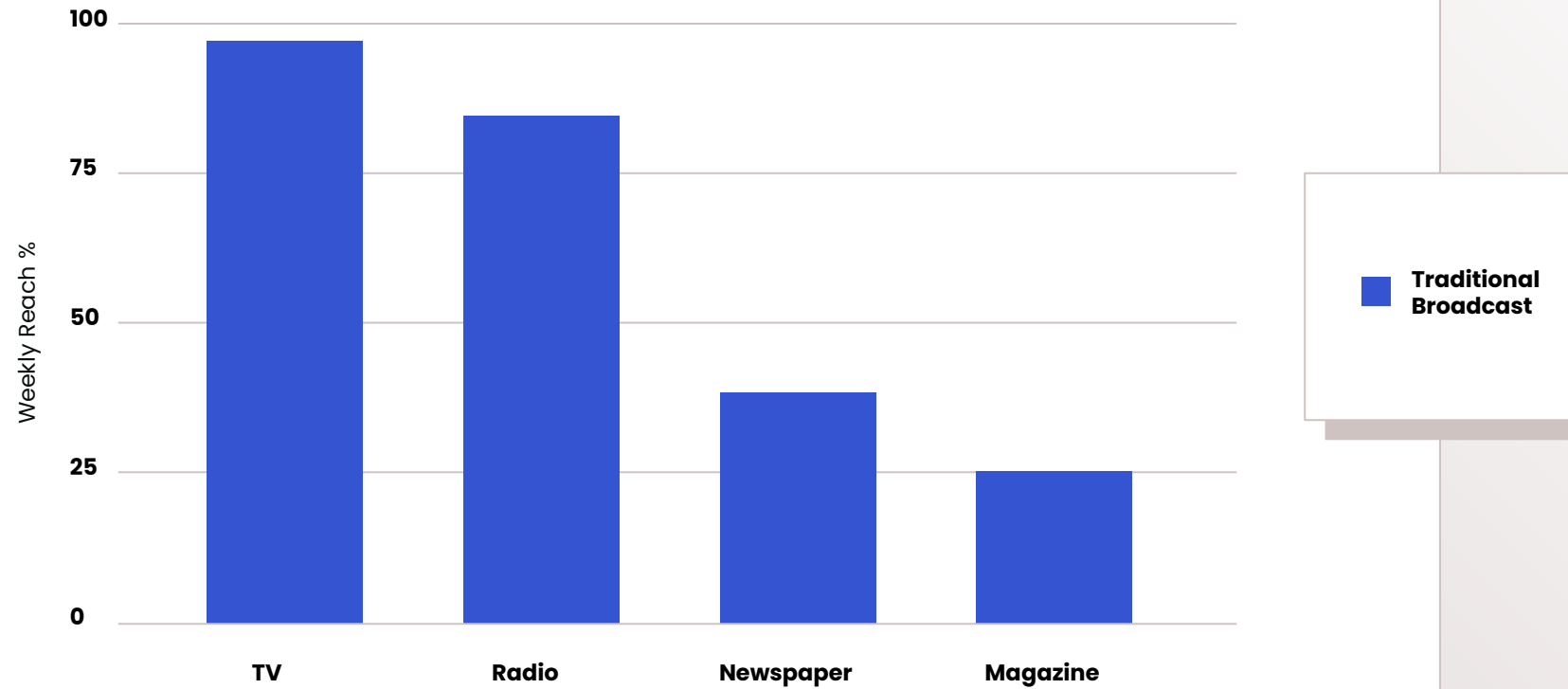
Adapting our media mix
for regional impact

Planning in the New Communications Economy



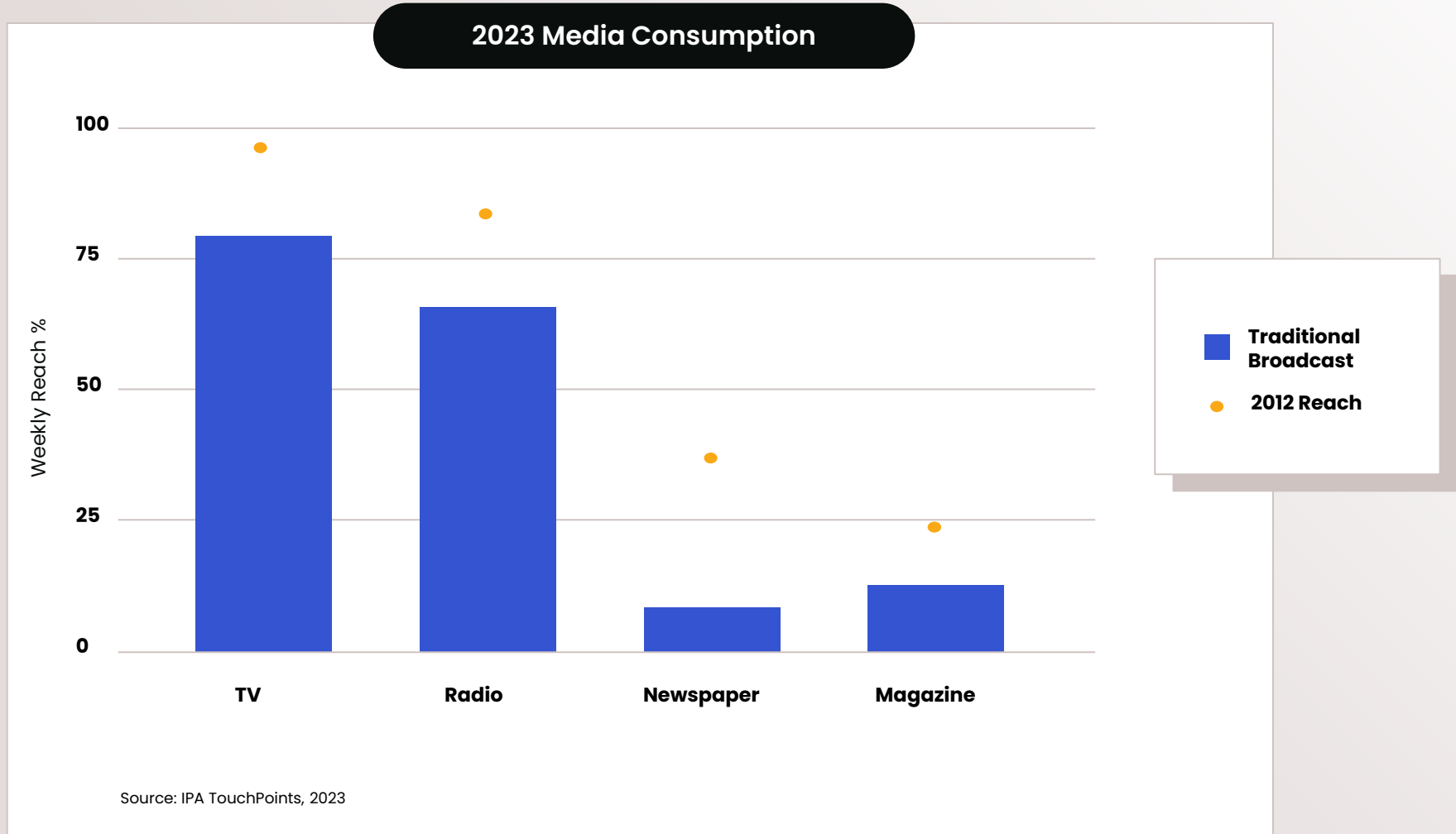
A decade ago, live media dominated consumption

2012 Media Consumption

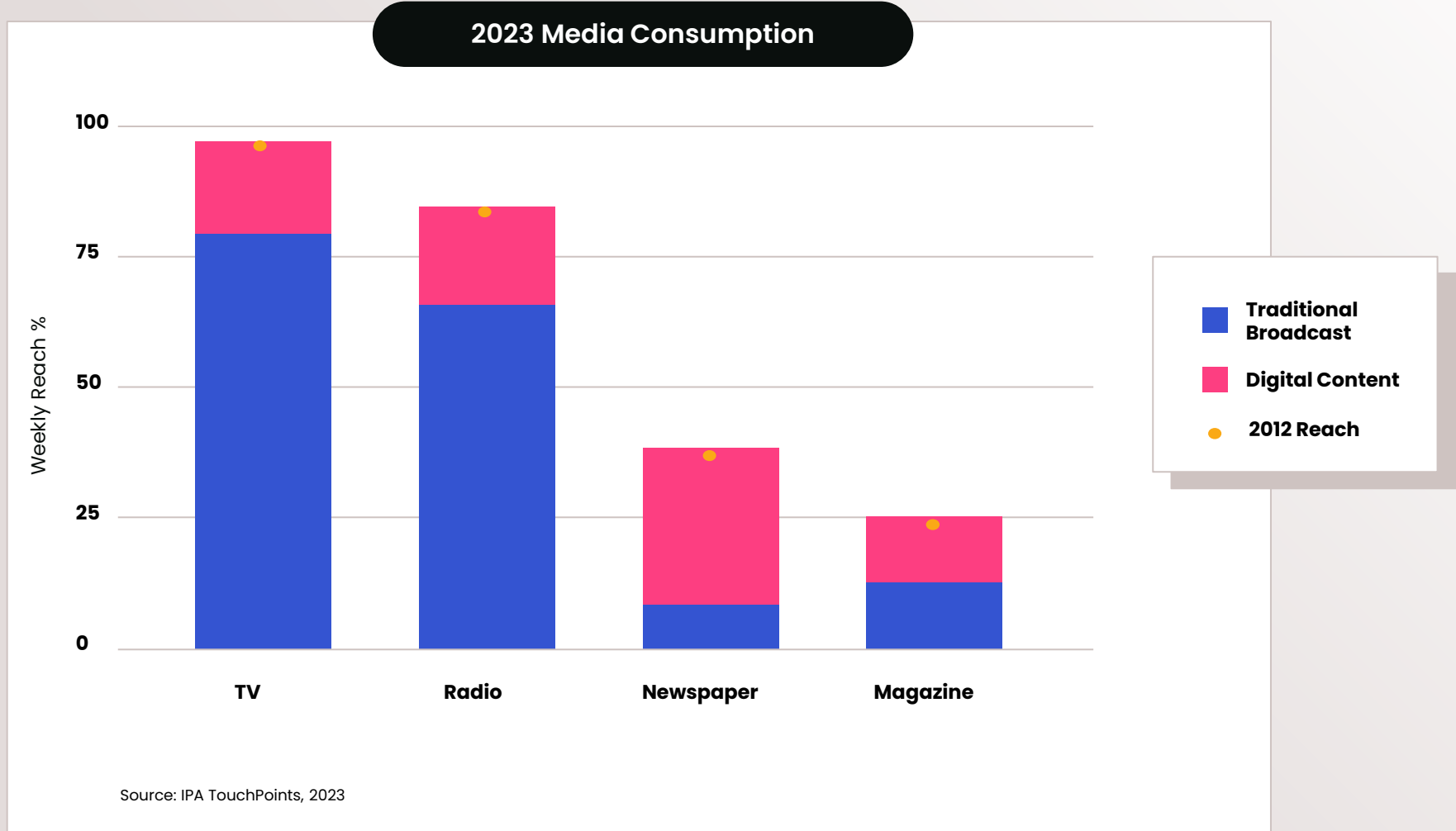


Source: IPA TouchPoints, 2012

Since then
linear reach
has dropped



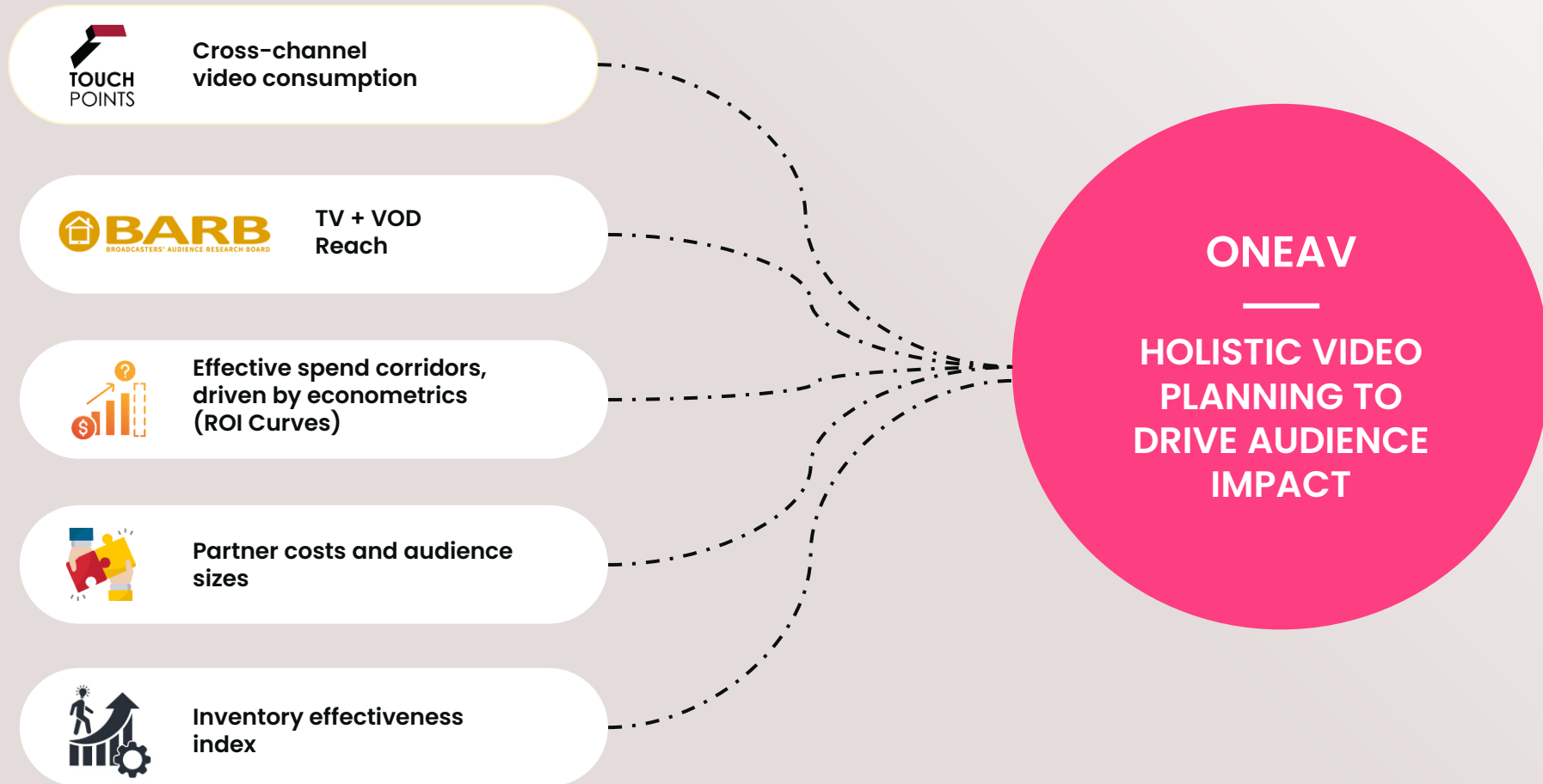
But total reach remains on par



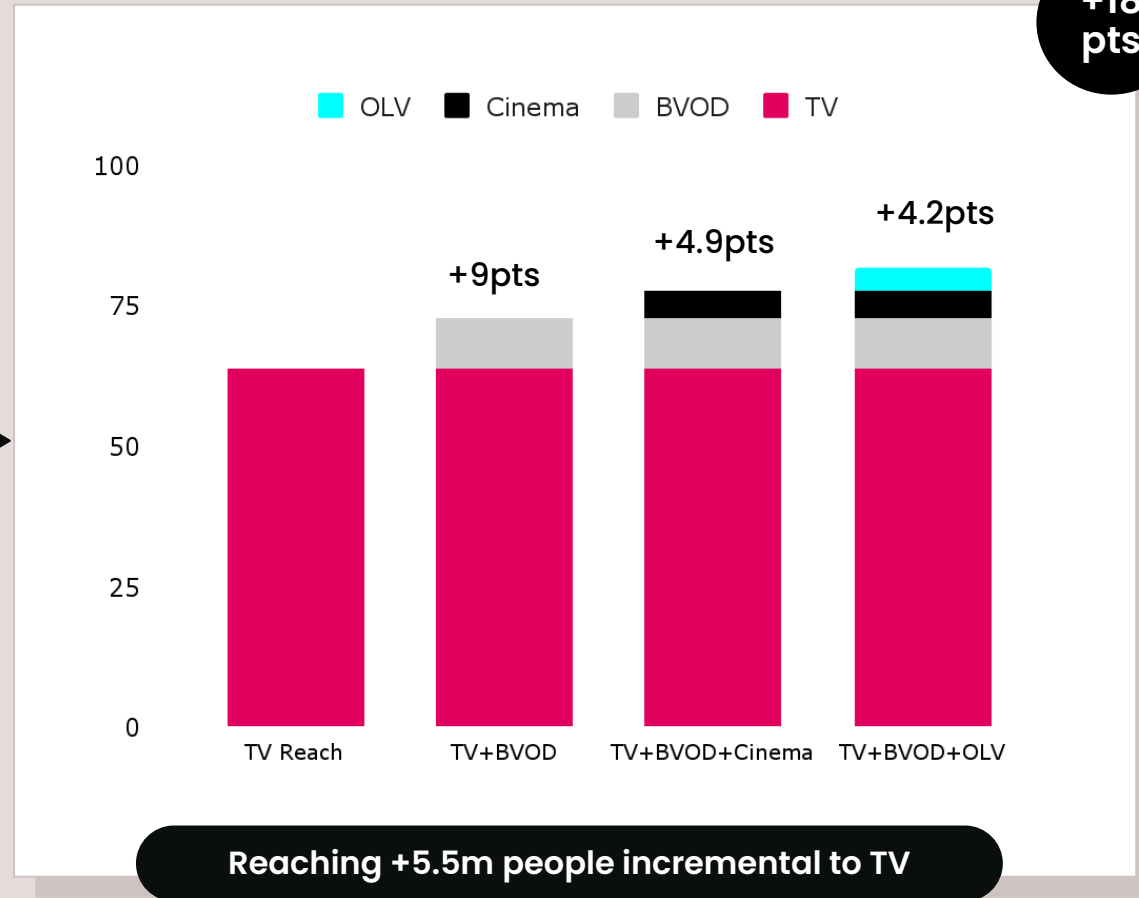
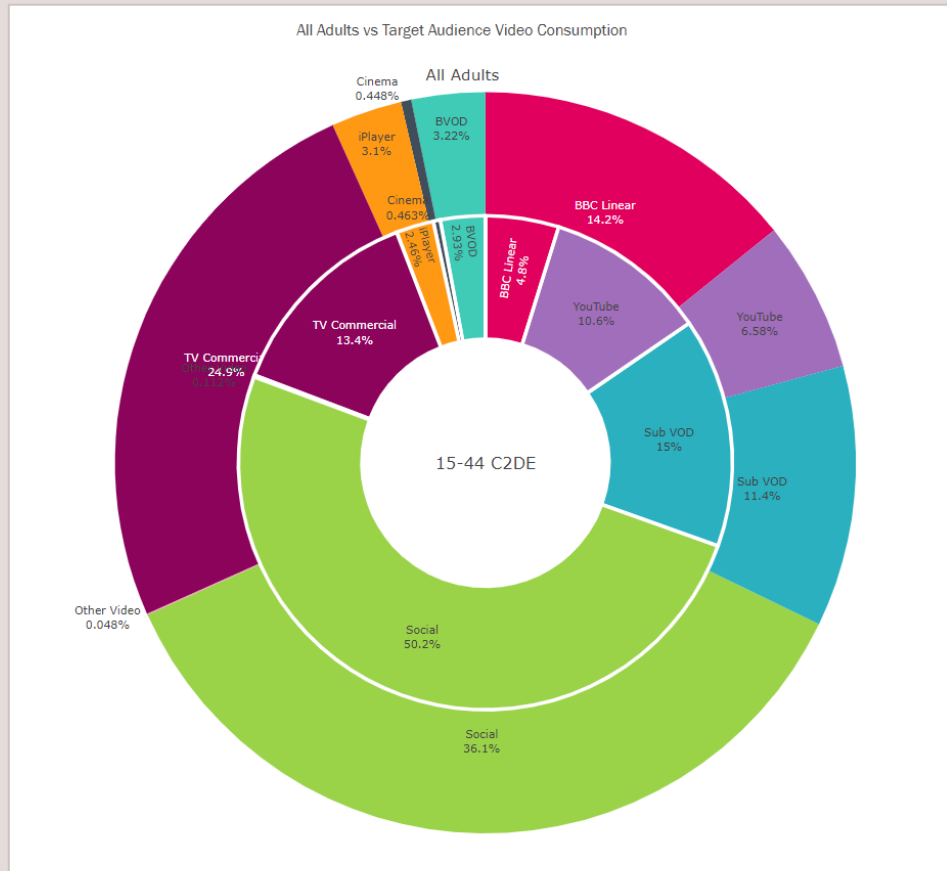
With fragmented consumption, how can we bridge the planning gap?



We connect the best industry data to build a full picture



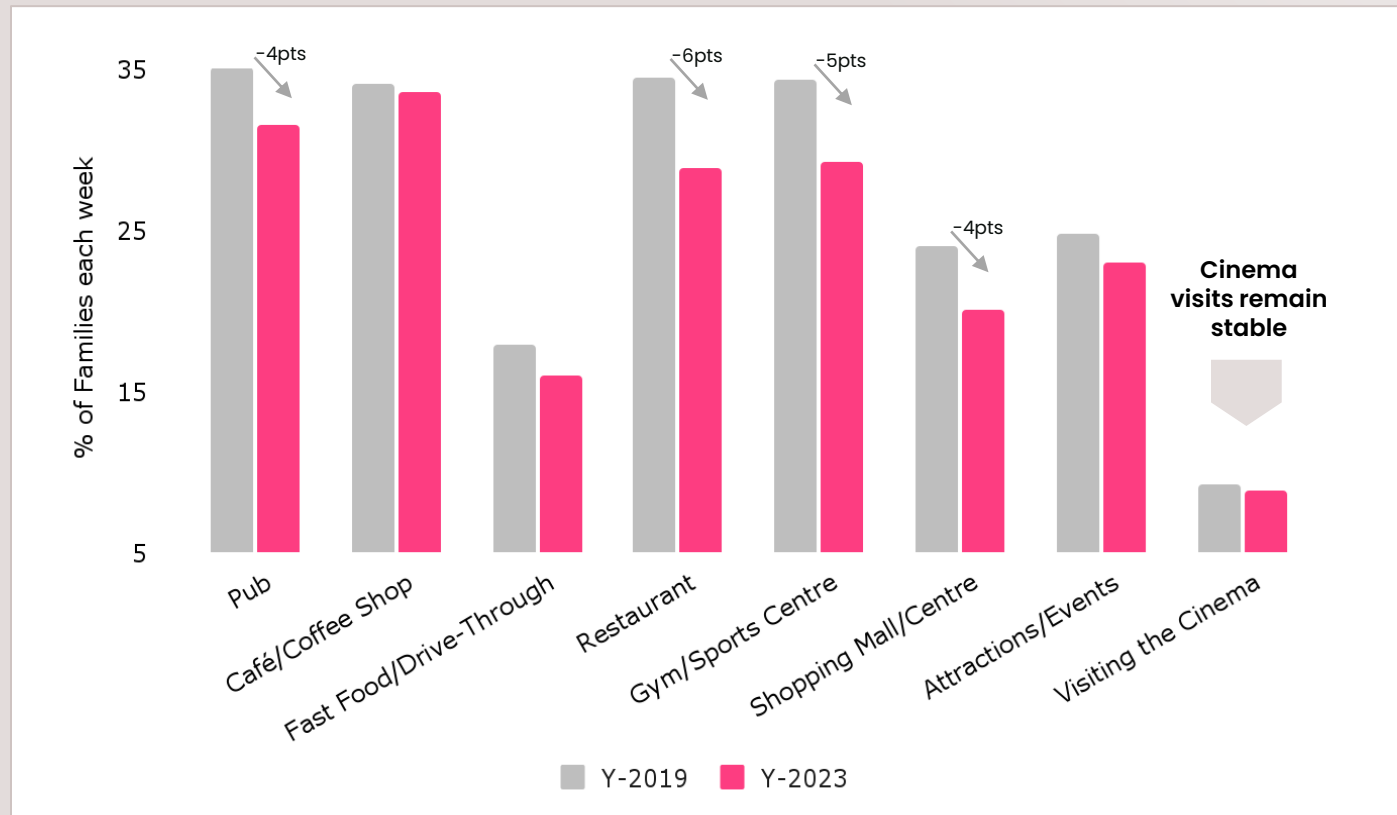
Holistic AV planning delivered 18pts of incremental reach



Tapping into family value moments



Families are more cautious when spending on leisure

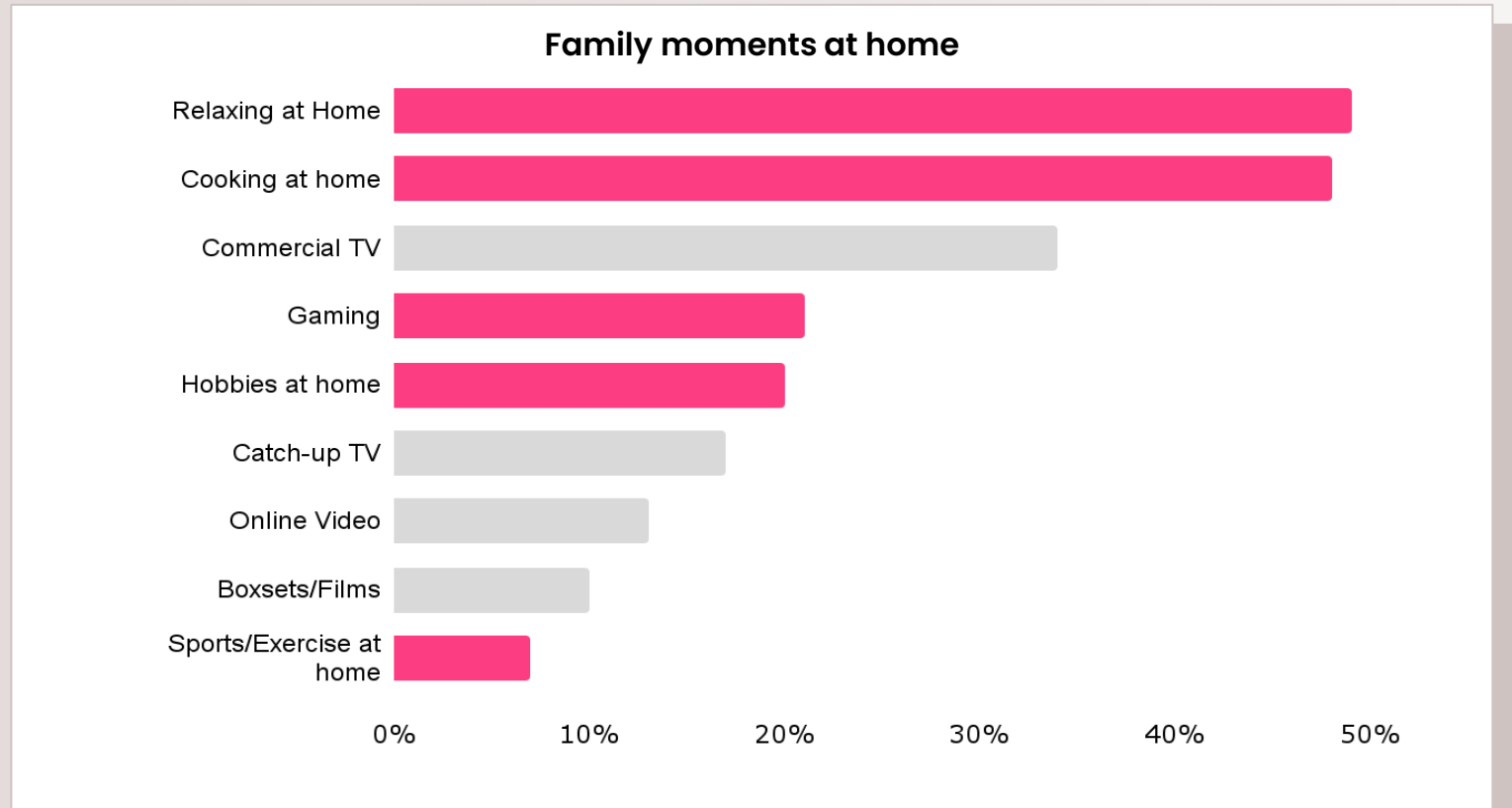


Families are spending 6% more time at home since the Cost of Living Crisis

*Families spend
5.5 hours +
watching TV
content together
each week*



The TV isn't the (only) heart of the home



Looking beyond AV unlocks a bigger opportunity

22%

listen to digital
audio together

+1.4m

reached
incremental to AV

Breaking out of the London bubble



London life has a different pattern



10% more likely to be going out socially

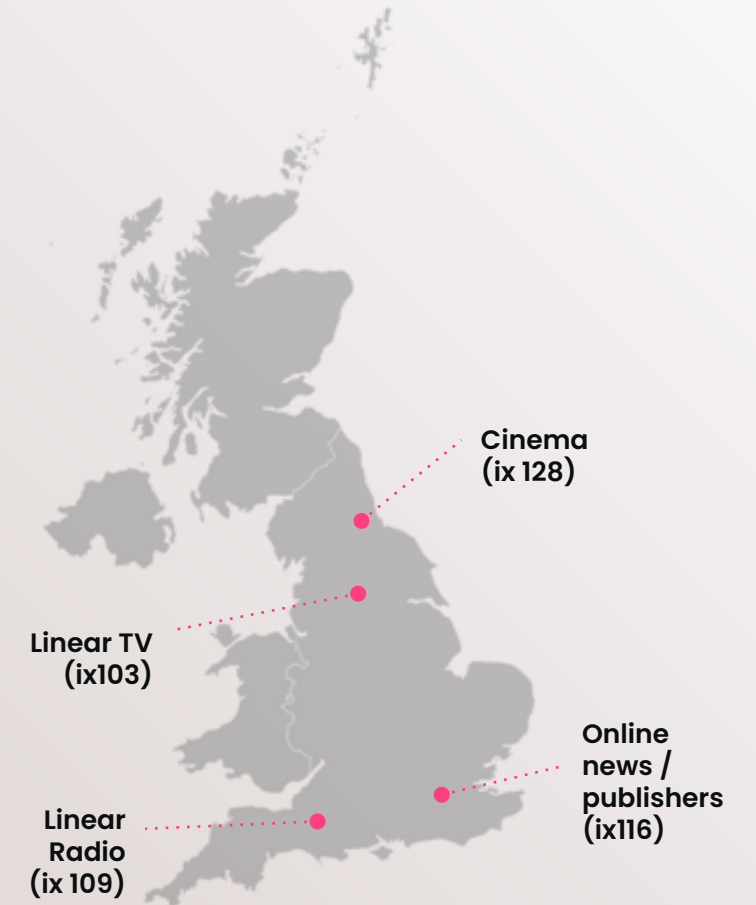
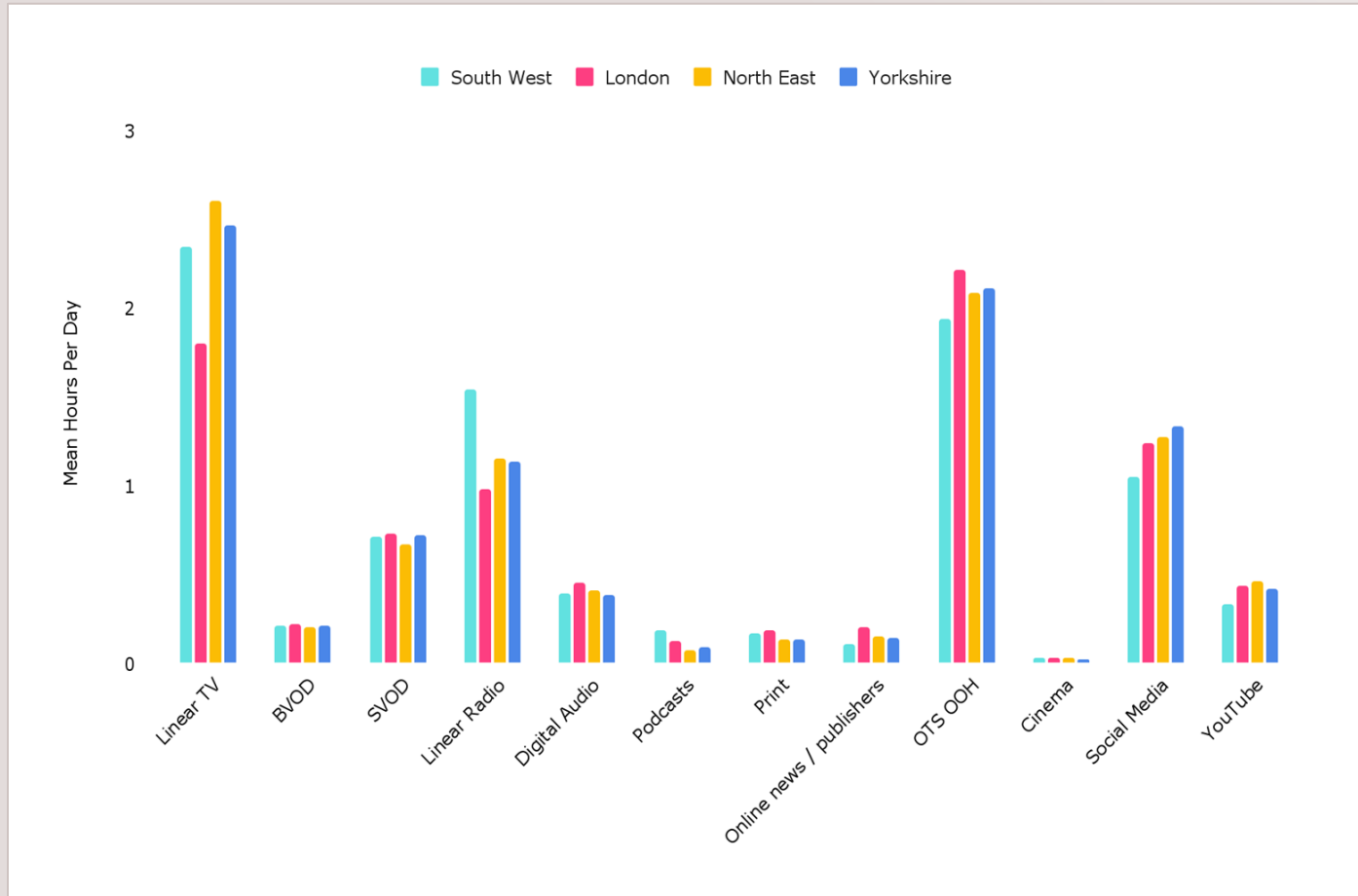


122% more likely to be on public transport



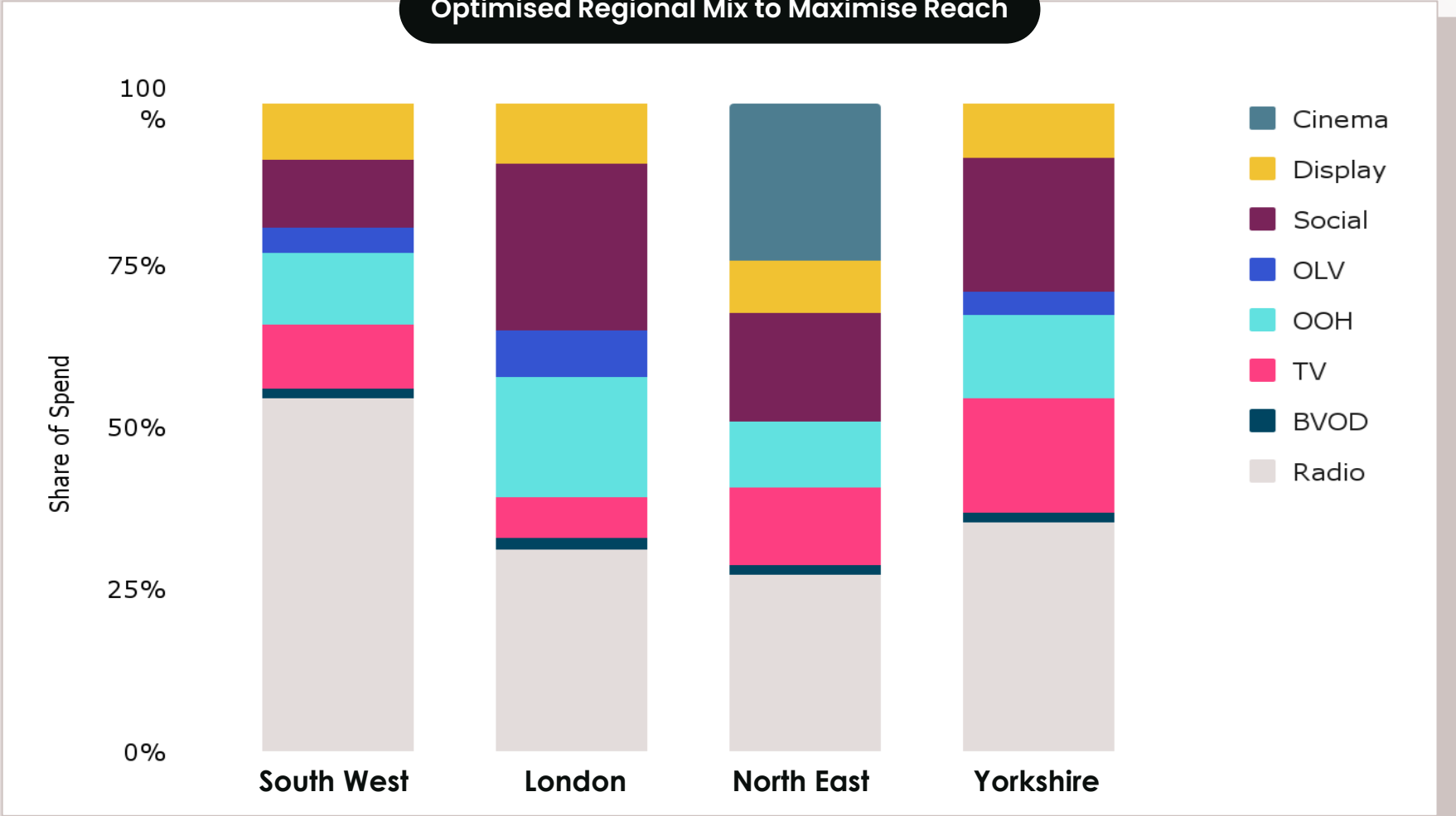
11% more likely to feel stressed

This influences regional media behaviours



Playing to regional nuances delivers local impact

Optimised Regional Mix to Maximise Reach



**Thank
You.**

essence**mediacom**X

essence**mediacom**X

essence**mediacom**X

essence**mediacom**X

essence**mediacom**X

essence

essence**mediacom**X

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Newsworks Case study

Heather Dansie

Research and Insight Director, Newsworks

Niki West

Director of Agency and Client Services, Newsworks

Journalism matters to people and to advertisers.

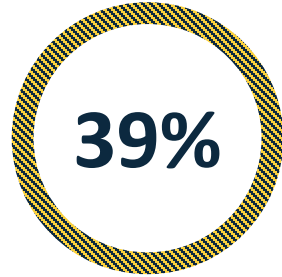
Time spent with news brands is valuable for brands.

Heather Dansie, Research and Insight Director
Niki West, Director of Agency and Client Services

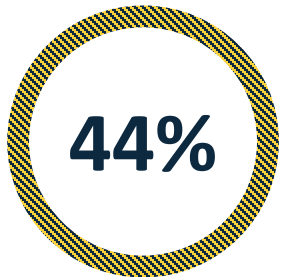
The past few turbulent years has taken its toll on the British public



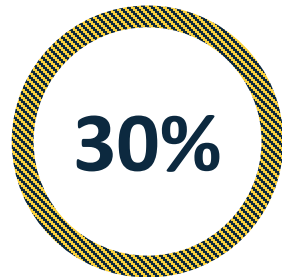
I find it hard to find time to relax



I am more stressed these days



The coronavirus has made me reassess my life



I would rather have more time than money



The UK increasingly prioritises free time which isn't dominated by leisure or work

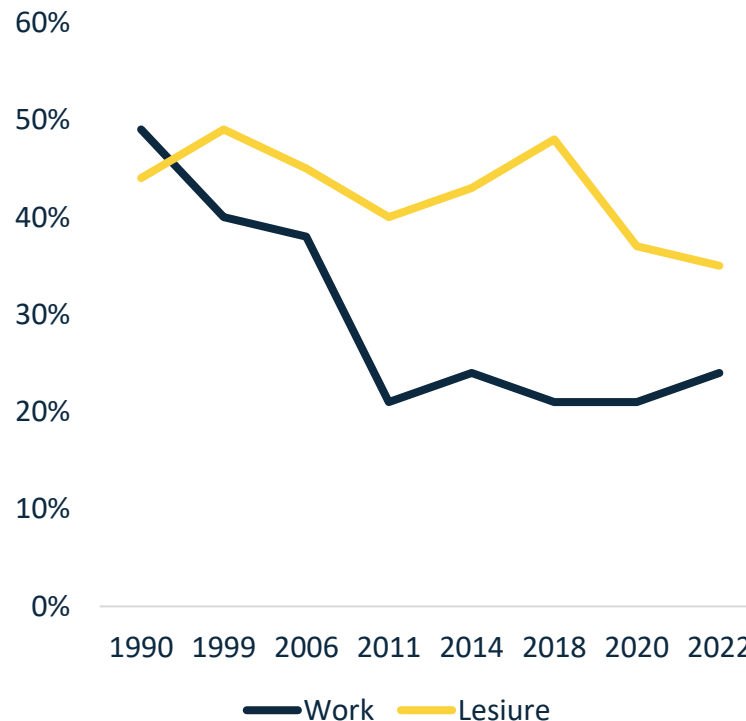
Work from Home

4.9m

People who now work from home, who didn't before the pandemic

Less Leisure

How important is the following in your life (% responding 'very important')

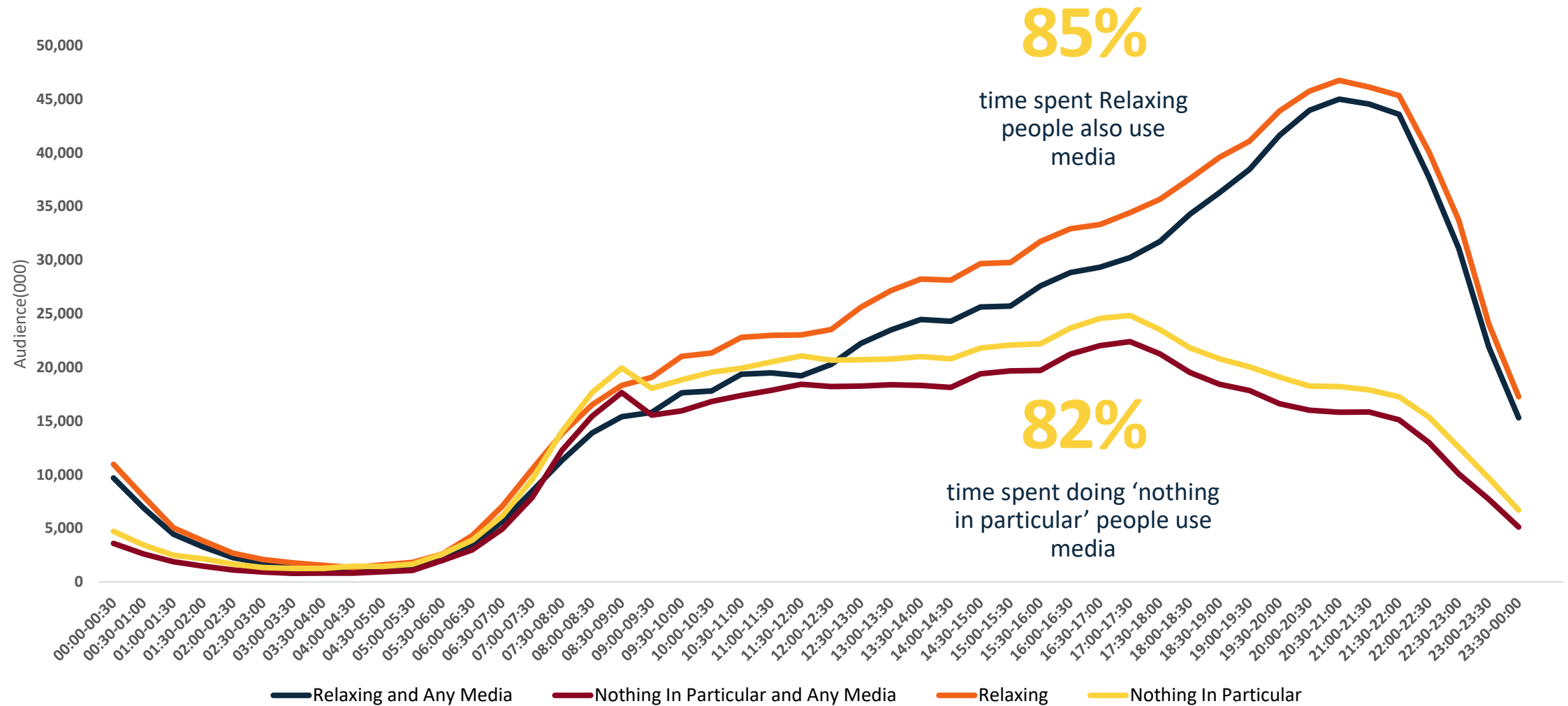


Slower Pace of Life

37%

adopted a slower pace of life during Covid. More than half now say they're keeping the change

People fill their free time with media



Half the population spends time with news brands every day

45m
monthly

39m
weekly

24m
daily

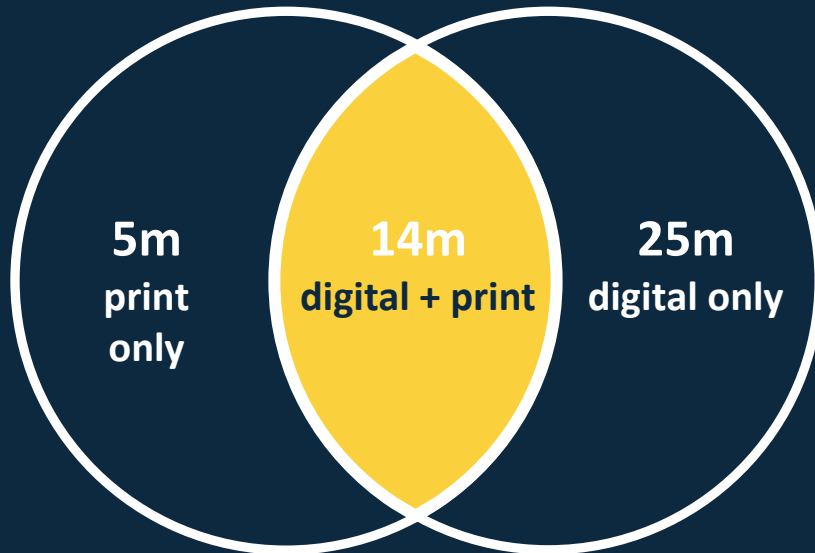
Print

19m
monthly

15m
weekly

8m
daily

Total monthly



Digital

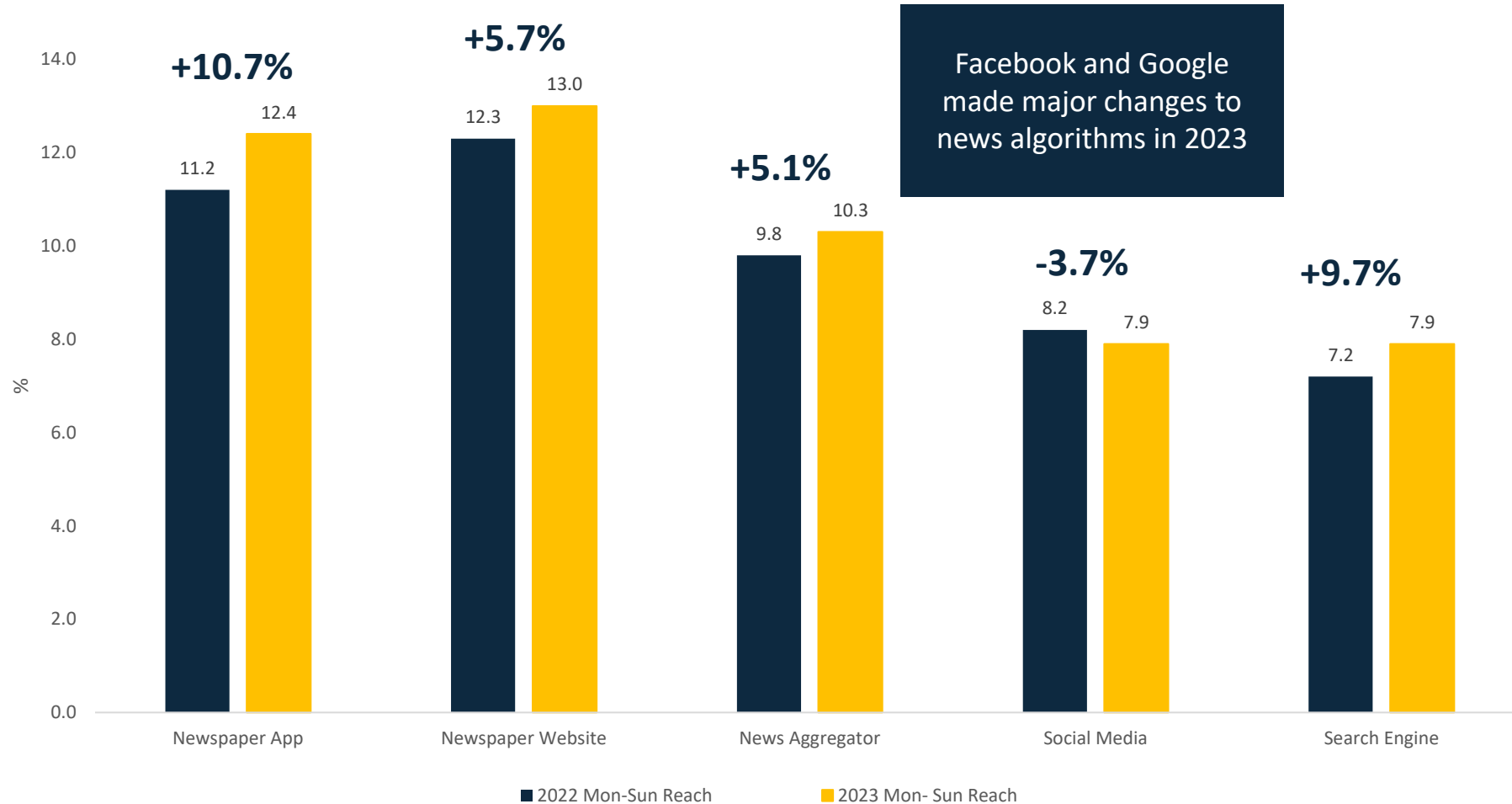
40m
monthly

32m
weekly

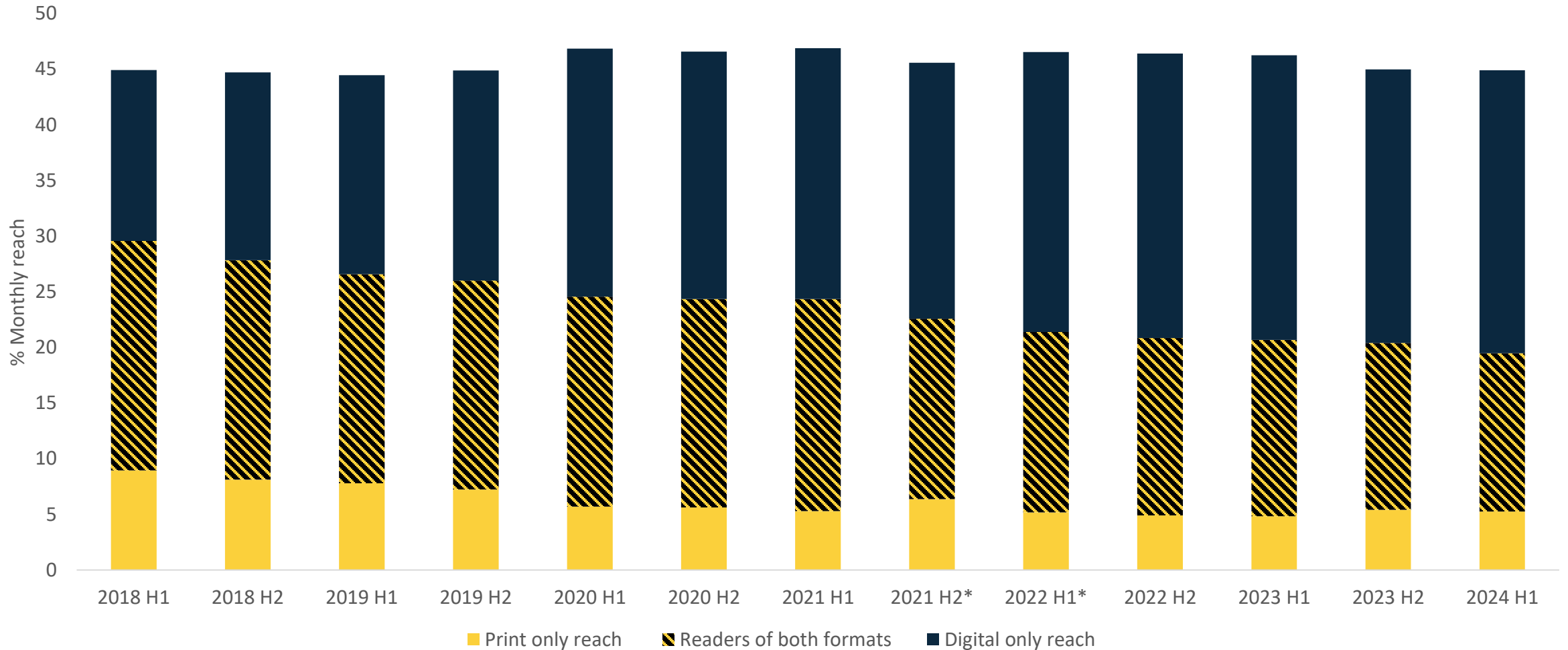
18m
daily



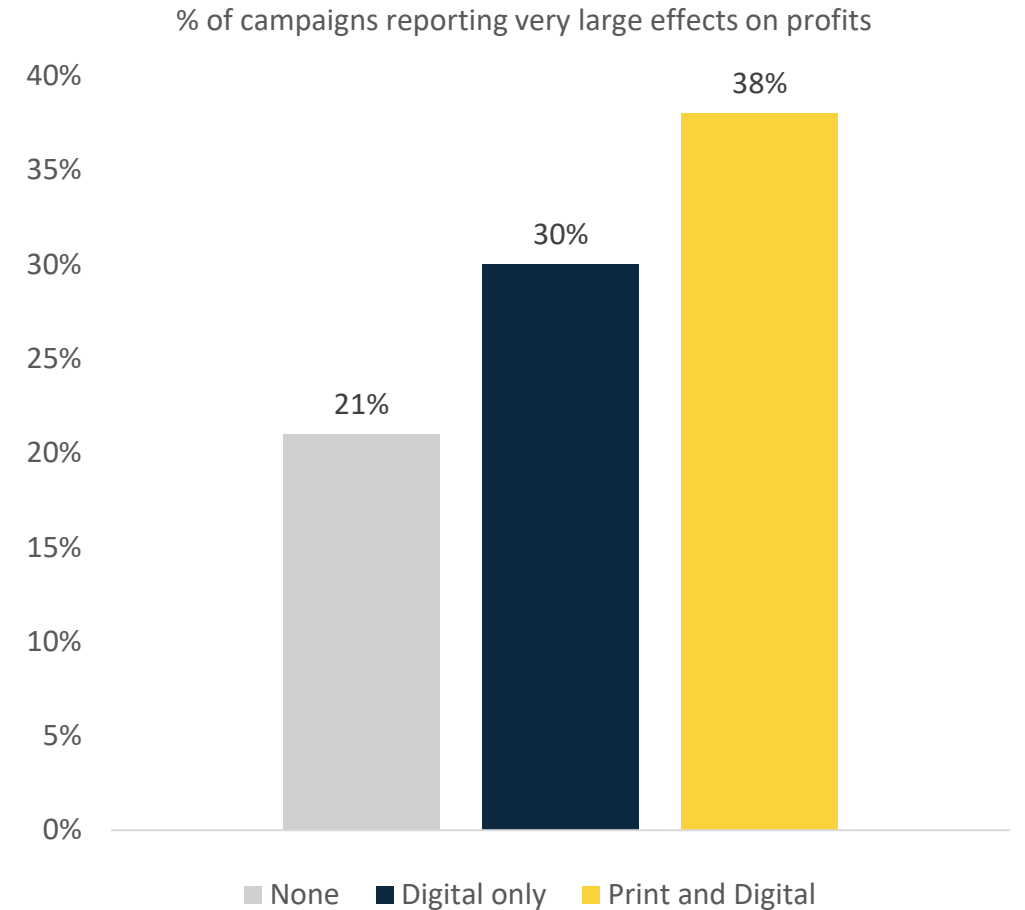
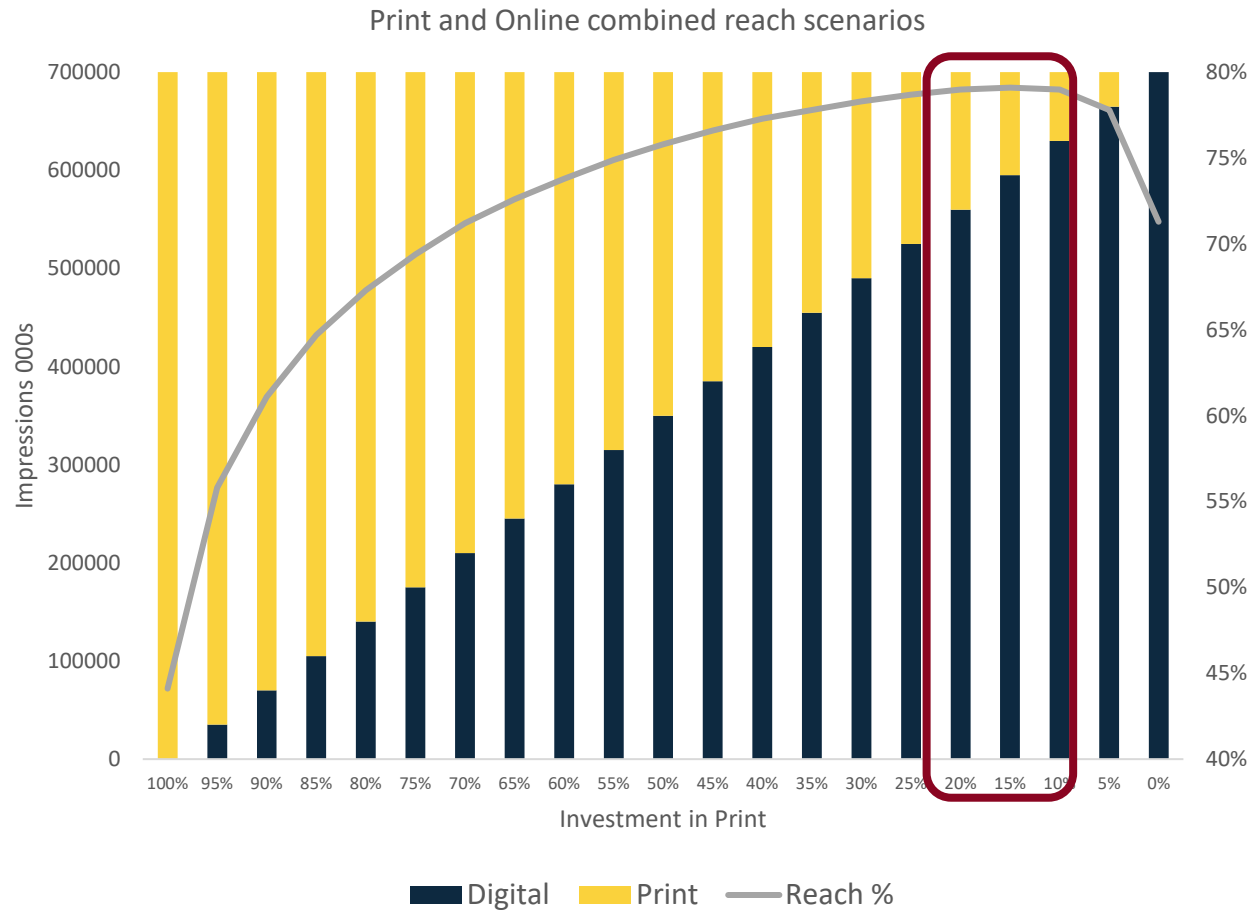
News brands continue to be accessed across multiple digital platforms



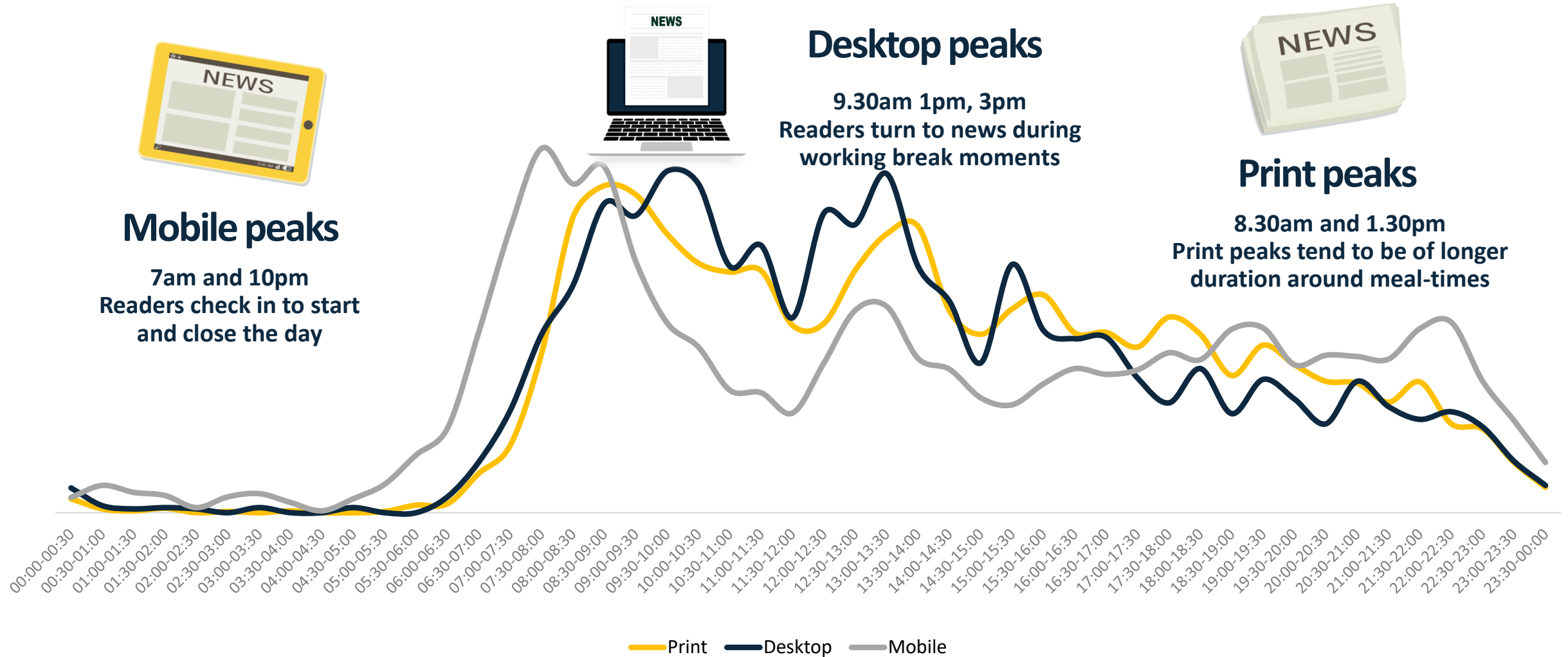
Reach for news brands has been consistent over time with a shift to digital



Investment in print as well as digital platforms increases reach and impacts brand metrics including profit



During the working week, news is consumed on different devices and formats in different times and contexts



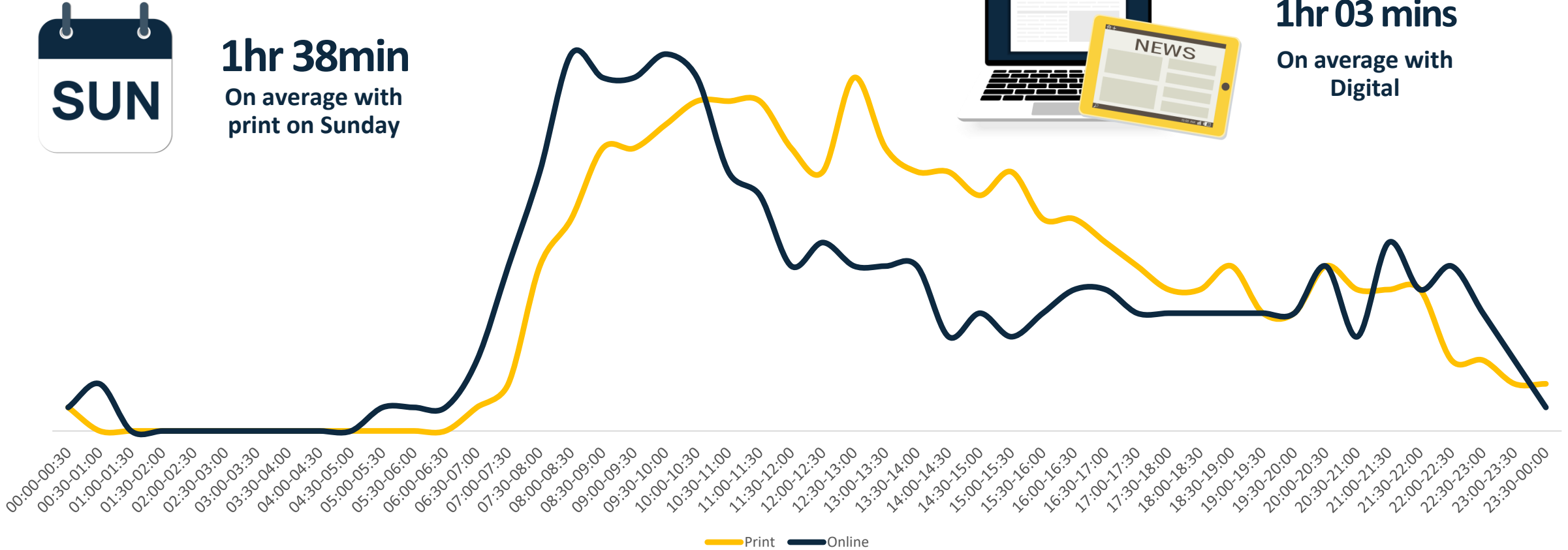
Sunday's lazy pace means print readership is steady from late morning onwards



1hr 38min
On average with
print on Sunday

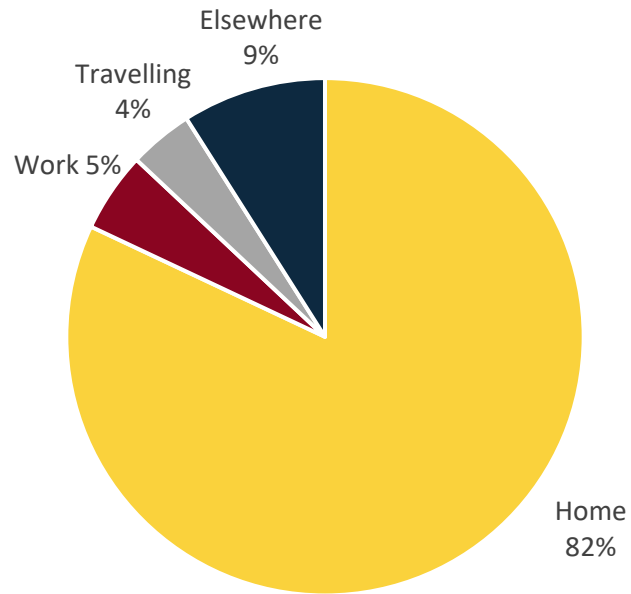


1hr 03 mins
On average with
Digital

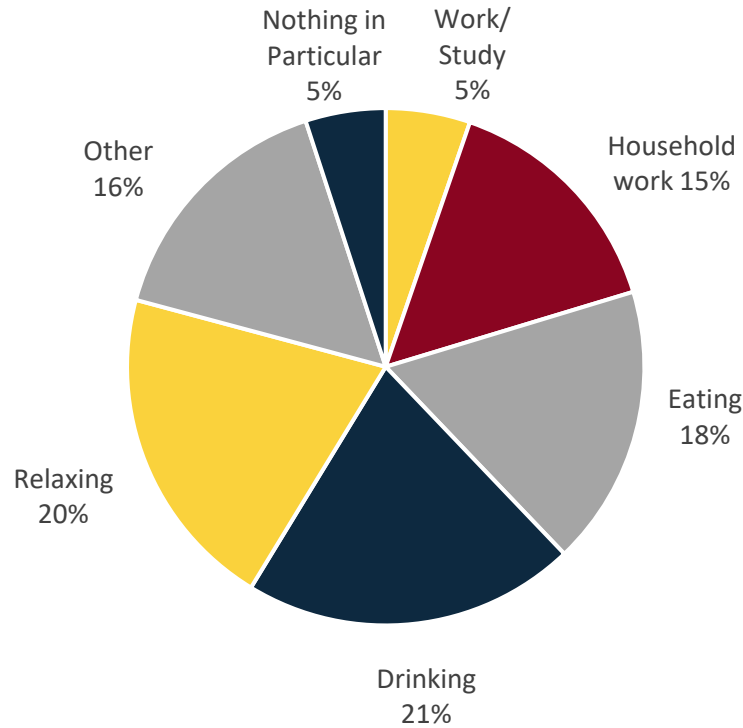


Readers turn to news brands when at home alone, taking a break

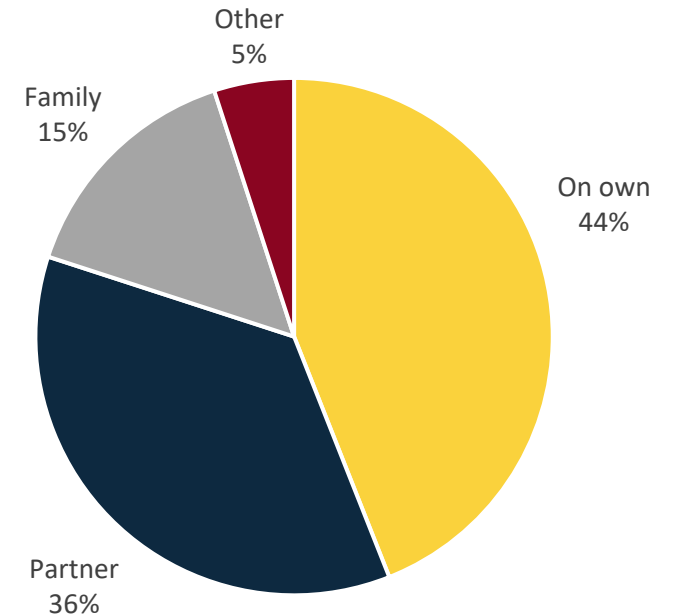
Location



Activity

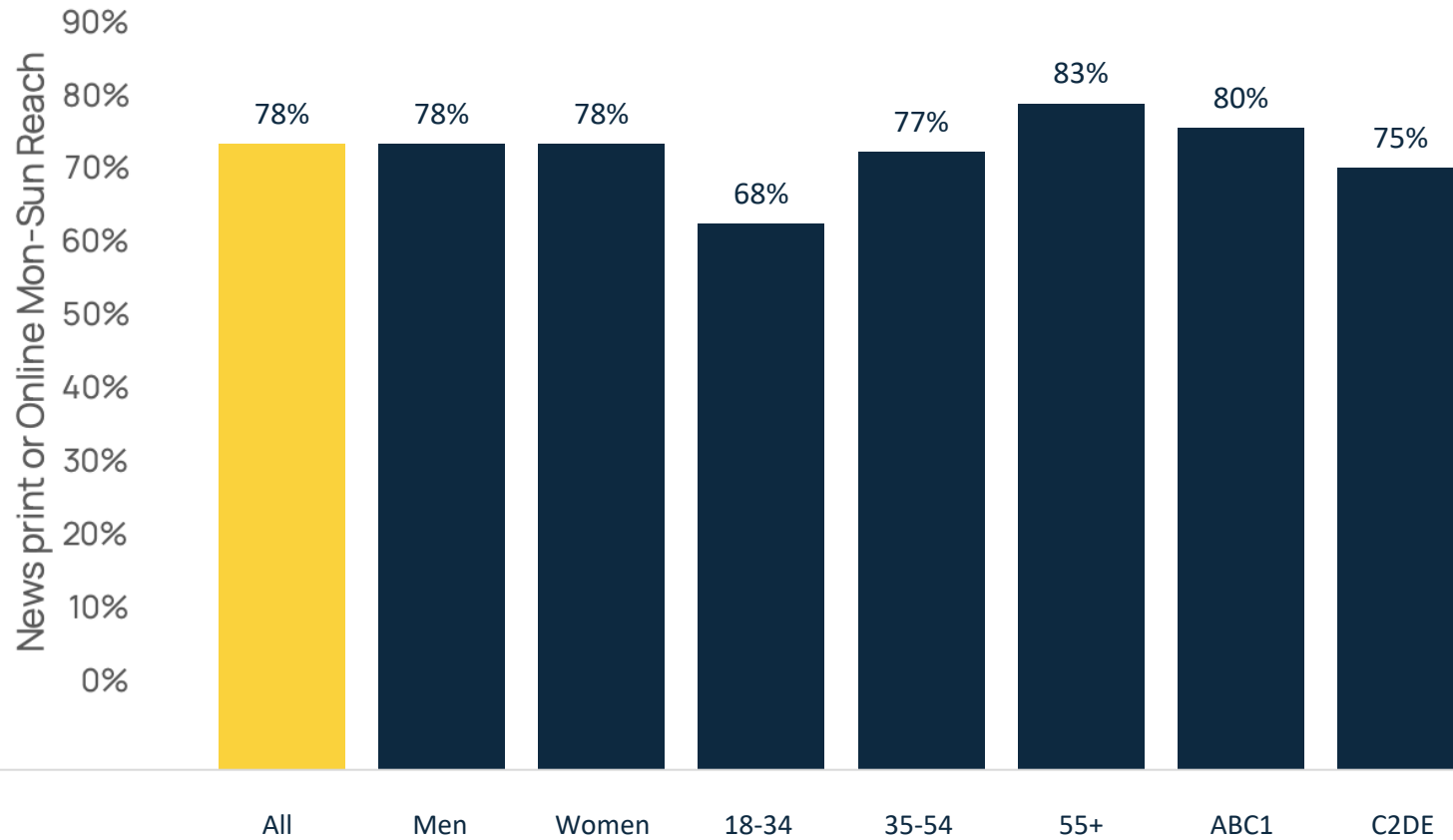


Company



'News' news dominates consumption, with 8 in 10 reading 'hard news' every week

National, European, International and Breaking News

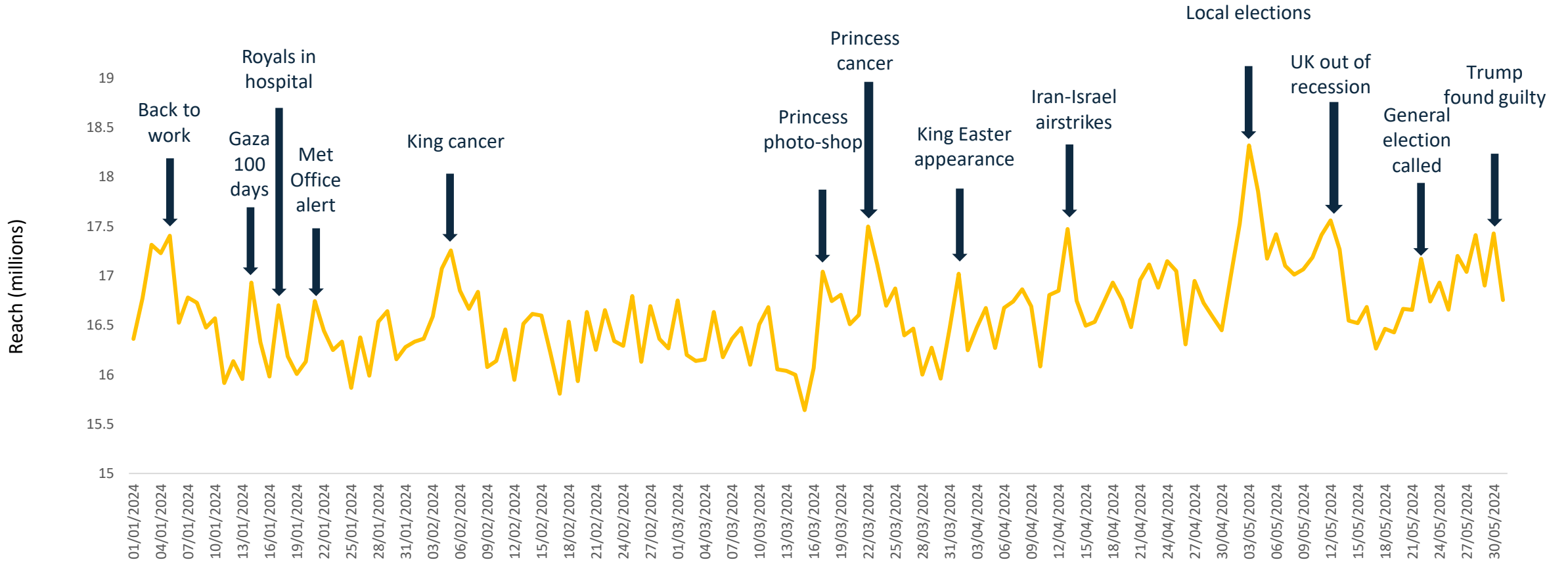


Hard news increases dwell time for ads

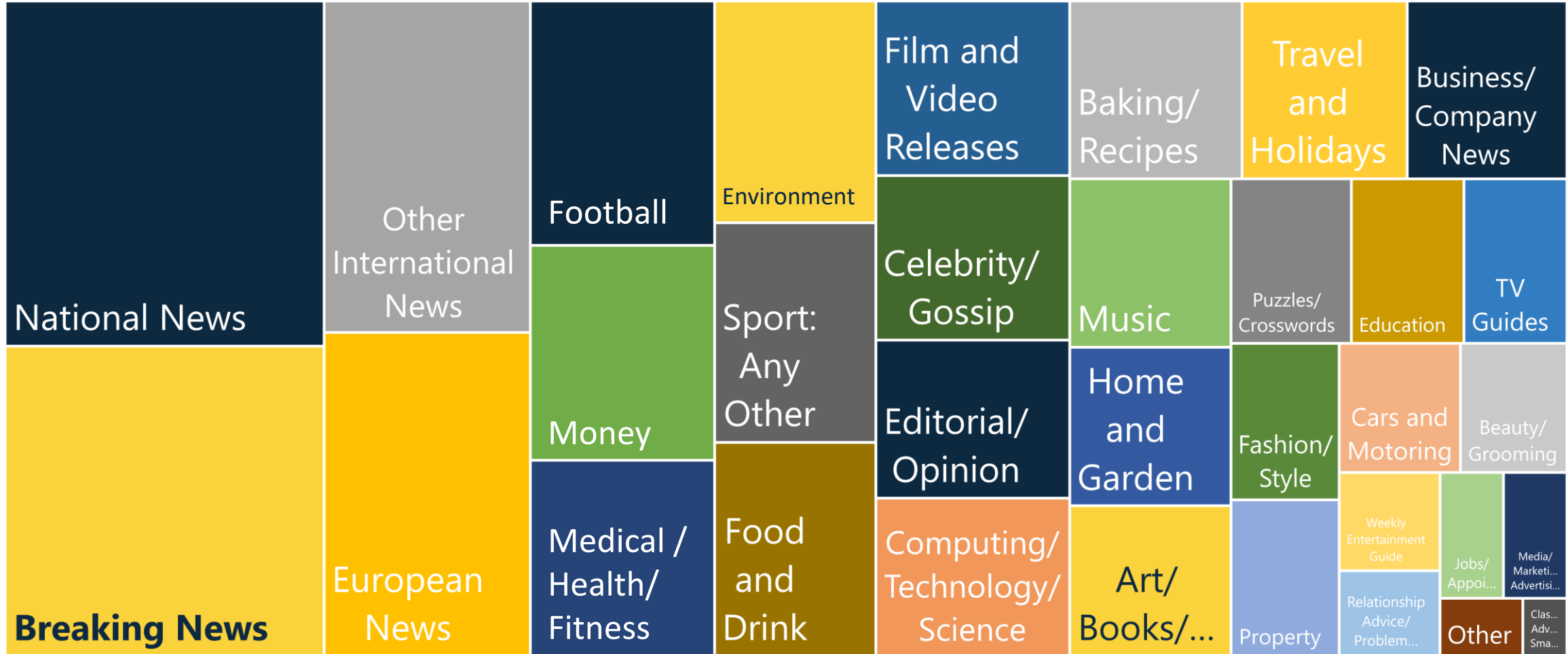
1.4x

45 seconds in hard news
versus
32 seconds in soft news

Readership interest spikes with the biggest stories of the day



Yet news brands offer a wide range of diverse content beyond the breaking headlines



News brands' authority and point of view means lifestyle journalism and reviews are highly influential to those in market, which can benefit advertisers

**29m plan
to go on holiday**



6.3 million 22%

read travel section
and read news brands for...

Ideas of what to buy ix 288

Stimulate imagination ix 253

Practical expert advice ix 225

**3m plan
to buy a new car**



610,000 22%

read car section
and read news brands for...

Ideas of what to buy ix 330

Practical expert advice ix 265

Something to talk about ix 236

**9m plan
home improvements**



2.3 million 25%

read home & garden section
and read news brands for...

Ideas of what to buy ix 311

For inspiration ix 258

Practical expert advice ix 233

**8m plan
to make Investments**



3 million 37%

read money and personal finance section
and read news brands for...

Practical expert advice ix 209

Stimulate imagination ix 209

Ideas of what to buy ix 189

Readers have a choice of content to view depending on their mood



Relaxed

- News
- Football and Sport
- Cars and Motors
- Food and Drink
- Travel
- TV / Entertainment Guides
- Home and Garden/ Property
- Puzzles and Crosswords

Focused

- Breaking News
- Editorial Opinion
- Money
- Music
- Environment
- Business
- Tech
- Arts books culture



The two key news brand mindsets are excellent for advertising attention

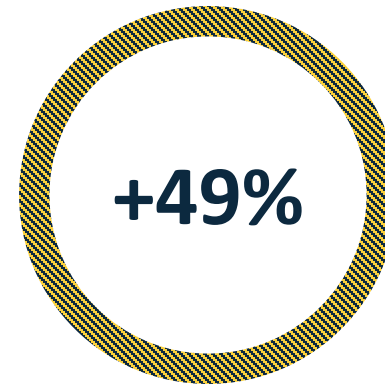
“One of the **very worst advertising environments for attention is social media**: “People are scrolling so tremendously quickly, like on a slot machine in Vegas - is it any wonder no one actually looks at these ads?”

One of the **most valuable advertising spaces** according to Lumen’s data **is next to long, absorbing articles from trusted publications.**”

Mike Follet, CEO Lumen

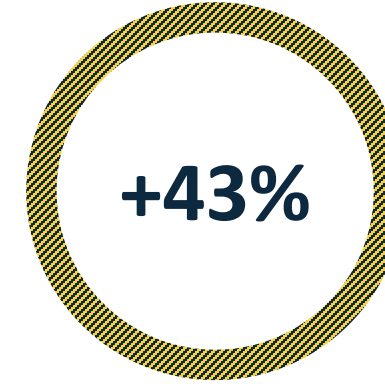
The Battle for Attention, The New Yorker, April 2024

Mon-Fri readers



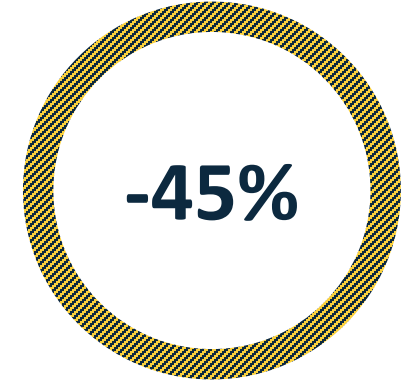
More likely to feel **focused** than social media users

Sunday print readers



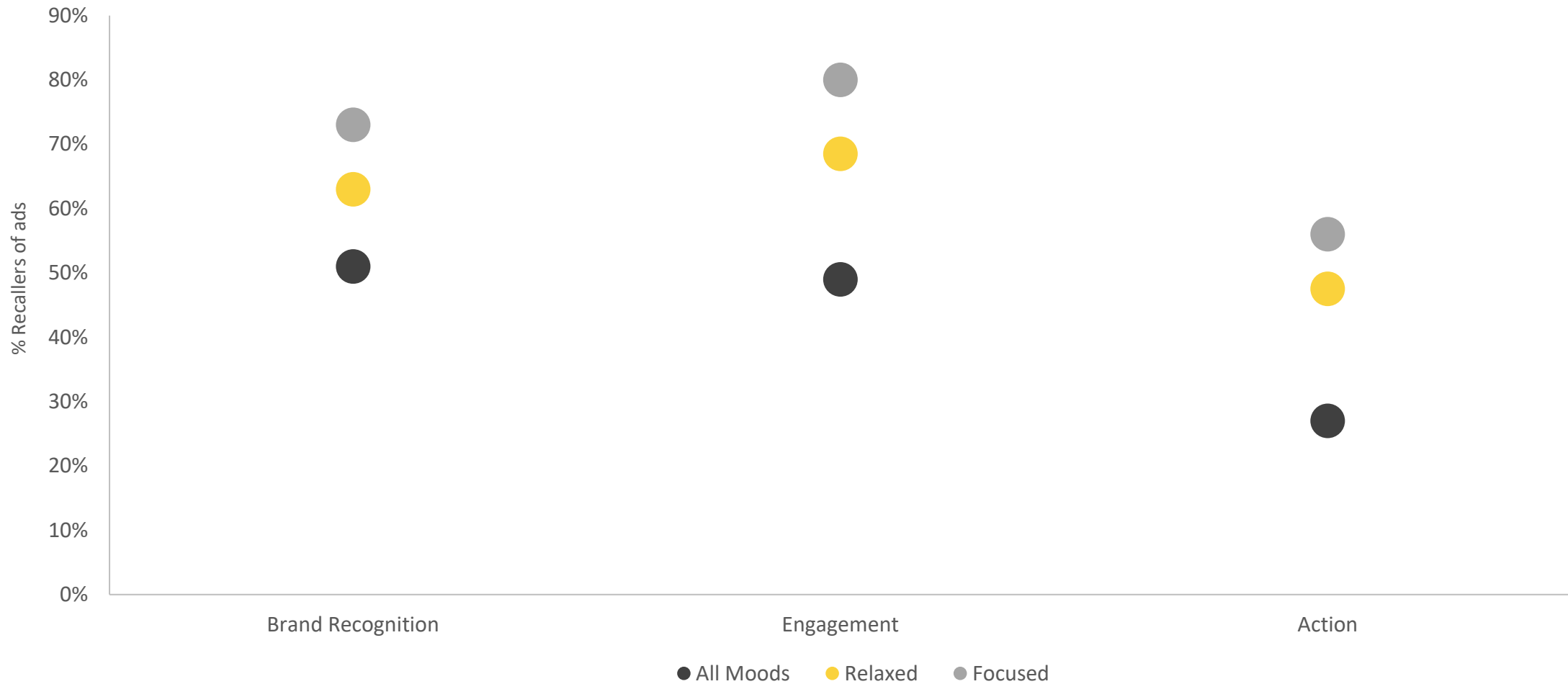
More likely to feel **relaxed** than social media users

Mon-Sun readers



Less likely to feel **tired** than social media users

Relaxed and focused moods are ideal for effective advertising, driving brand recognition, engagement and consumer action



Whether readers are **focused and leaning in** or **relaxed and unwinding**, news brands have the content that resonates

Focused – Lean in

Asda's tactical **salad shortage** campaign ran alongside breaking news stories to create brilliant contextual ads

Star Saturday, February 25, 2023

TURNIPS RUN OUT

Shelves stripped after minister says to buy them

By ASHLEY ARMSTRONG

SUPERMARKETS have now run out of turnips — a day after people were urged to eat them instead of tomatoes.

Stores yesterday suggested shoppers switch to avocados instead.

There was a rush on just veg after food supply minister Theresa Coffey suggested turnips as a solution to the shortage of salad crops. All the major supermarkets apart from Sainsbury's and Waitrose have rationed tomatoes, courgettes, lettuce and peppers in a bid to prevent stock levels dropping too low.

Earlier this week Iain Sturgeon, the SNP's minister for rural affairs, urged people to buy turnips as a "Mediterranean alternative" to tomatoes.

Meanwhile, growers have warned supplies of leeks could run out before St David's Day next week. Harvests have been hit by a lack of rainfall and extremely cold weather.

The Leek Growers Association said leeks were in short supply as farmers "are facing their most difficult season ever".

Despite empty shelves in many stores for Robert Goodwill, Tory chairman of the environment, food and rural affairs committee, issued yesterday: "There's loads of good produce — there's good UK-grown parsnips, leeks."

He did however admit: "Turnips are great, but you can't eat them every single meal."

Growers' fear shortages will last until next month as it will take that long for crops to grow in the UK, with planting only starting in earnest next week.

Shoppers have also been hit by shortages in Spain, Morocco and North Africa for the current shortages. Most salad crops sold in our supermarkets during the colder months are imported from these regions.

Can horror... Robbin

Rust film is fined £83k for set death

By THOMAS GODFREY

THE production company behind the film *Rust* has agreed to pay a fine of £83,000 over safety breaches on the set.

Halyna Panchenko was shot dead on the set of the film in 2021 when a prop gun was discharged by actor Alex Baldwin.

The penalty has been lowered from £104,000 for "serious" violation.

Best Movie Productions, which was filming in New Mexico, said: "We are pleased to have an agreement which demonstrates the situation."

"Our priority has always been completing the film so we can honour the life of Halyna Panchenko."

Baldwin has denied any responsibility.

Cannabis heart risk

REGULARLY consuming cannabis could give you a heart attack, according to a new study.

People who smoke marijuana or just weed-baked edibles daily are a third more likely to develop coronary artery disease (CAD).

CAD is the most common form of heart disease and causes chest pain, shortness of breath and can lead to heart attacks.

Dr Johan Parisejo, the study's lead author, said: "There are certain harms of cannabis use that weren't recognized before — people should take that into account."

Mobiles tariff trap

MOBILE phone users are being the victim of huge and complex price increases, some that are 400% higher, it has warned.

The consumer group is calling on providers to let customers have without penalty if they like change mid-contract.

It also urged them to cancel 2023 inflationary hikes for vulnerable consumers.

Of the big four providers, EE, Three and Vodafone could increase tariffs by more than 10 per cent for the next 12 months, while O2's hikes could be even steeper, by as much as 12 per cent.

Hikes are higher if deals include the handset.

I'M A CELEBRITY

Clayton Kersh, 26, who has been on the show since 2017, was knocked down in Wales.

Come fly with me

Romaine calm

ASDA

Like other supermarkets, we're experiencing sourcing challenges due to weather affecting harvests. We're temporarily limiting some of our salad items to 3 per item, per customer. But we're working hard and are confident our ongoing efforts will soon bear fruit (and lots of it).

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Romaine calm



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ASDA

Relaxed – Unwind

Aviva's solving financial puzzles campaign elevated their brand messaging through contextually relevant content – puzzles and crosswords

PUZZLES

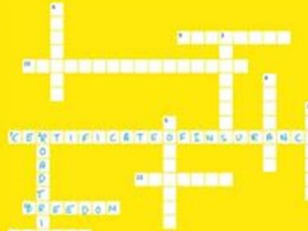
CROSSWORD

DOWN

- The amount you pay for an insurance policy (2 words)
- The name for a group of holiday where you don't have plans to leave for your car (2 words)
- Where you get stop to stretch your legs on a long car journey (2 word)
- A long concrete pier, deep to water while mooring (2 word)
- The safety feature of an engine which will shut down (2 word)
- The Aviva app where your business documents are stored (2 word)

ACROSS


- The document which proves your car is insured (2 words)
- To put something that is damaged back to work correctly, back into good condition (2 word)
- To confirm someone and stop them from working (2 word)
- The extra cover given for some insurers which allows you to use another vehicle (2 words)
- The great ferry when you're back on the open road (2 word)
- A famous road to get your A166 (2 word)



WORDSEARCH

R	P	S	A	N	N	U	A	L	L	O	W	A	N	C	E	N	K	L	E	R		
G	N	L	V	A	V	B	N	M	J	H	G	F	S	Q	L	O	O	T	S			
H	I	A	K	E	B	O	S	T	I	D	S	G	H	I	V	A	S	S	Y			
I	I	Z	X	F	S	O	C	T	I	F	O	I	A	C	H	E	K	A	Z			
Y	O	T	T	C	E	R	H	E	L	L	O	O	D	D	G	J	L	E				
N	I	Q	V	D	N	F	V	E	I	N	E	D	D	E	N	E	F	I	T	M		
S	P	T	U	S	N	I	Q	A	U	V	I	G	S	H	E	T	L	L	E	R		
I	O	F	N	S	P	K	A	H	E	T	T	T	U	K	D	A	E	B	C	X	R	
T	T	S	N	P	U	Z	L	E	F	S	Z	T	T	R	E	S	O	L	V	E	D	
A	S	A	G	Y	L	L	U	K	N	A	M	H	T	A	B	N	T	Y	K	T		
S	C	H	E	D	S	I	N	A	G	R	O	W	Q	L	T	B	E	I	Q	G	H	
A	U	T	O	M	A	T	I	C	E	N	R	O	L	M	E	N	T	L	U	V	A	R

Helping solve your financial puzzles? It takes Aviva.



aviva.co.uk

Games & Puzzles

Dominoes

How to play: Fill in the 28 domino pieces from 1 through to 6-6. You have been placed into the grid. Can you work out where each of these is placed?

3	3	6	2	5	5	3	6
2	4	3	6	0	1	0	6
0	3	4	1	1	2	3	4
1	4	5	2	6	5	5	4
5	6	3	1	2	0	4	0
2	1	2	4	6	1	0	5
4	6	2	3	5	0	0	1

Journey Finder

How to play: Place the numbers in order to find a route from the start to the end. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

1	4	3	1	3	4
3	2	4	2	4	1
2	4	1	2	3	2
3	1	2	1	1	3
4	2	3	4	2	4
1	3	2	1	4	3

Train Tracks

How to play: Numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10
1	2	3	4	5	6	7	8	9	10

Binary

How to play: Complete the grid so that each row and column contains two 0s and two 1s. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

0	1	0	0	0
1	1	1	1	1
1	0	1	1	1
0	1	1	1	1
1	1	1	1	1
1	1	1	1	0

Number Hexagon

How to play: Each hexagon is divided into six triangles. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

1	8				
6	2				
1	8				
3	8	6	8		
5	2	5	1	3	2
8	6	5	4		
8	2				

Pathfinder

How to play: Starting from the start square, you can move up, down, left or right. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

C	A	C	E	N	I	L	M	
Y	O	I	L	S	A	E	U	P
E	V	T	E	O	N	O	H	
M	I	T	O	E	T	I	E	M
R	L	L	O	E	L	R	A	E
E	G	A	J	O	N	I	O	
R	E	T	T	A	H	E	L	K
W	I	T	O	N	A	O	C	A
H	E	R	A	K	S	O		
S	E	A	R	V	A	G	E	O

Chain Link

How to play: Place the numbers 1-6 in each row, column and diagonal so that the numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

1	6
6	3
3	1
1	6
6	3
3	1

Daily Quiz

1. What is James Cook's famous discovery?
 2. To remember and playfully describe a person is the trademark of which famous comedian?
 3. In which US state would you find the longest tunnel?
 4. Which famous author has created a new collection of hard-boiled detective stories to mark the centenary of the birth of the character of King Charles II?

Jigsawdoku • Zygolex • Codeword • Sudoku • Idoku • Knight's Tour • Word Wheel

50 **WISDOMS**

British Gas told to improve smart meter warranty

Smart meters have not always been the most reliable of devices, and a new report from the Consumer Council for Britain has urged the government to improve the warranty for smart meters.

The report says that smart meters are often unreliable and that the warranty for smart meters is often too short. It says that the government should consider extending the warranty for smart meters to at least 10 years.

The report also says that the government should consider providing a guarantee for smart meters. This would mean that the government would be responsible for the cost of replacing a smart meter if it fails within the warranty period.

The report is part of a series of reports from the Consumer Council for Britain. The council has been critical of the government's handling of smart meters and has called for a more robust regulatory framework.

Puzzle solutions

Helping solve your financial puzzles? It takes Aviva.

Dominoes

How to play: Fill in the 28 domino pieces from 1 through to 6-6. You have been placed into the grid. Can you work out where each of these is placed?

Journey Finder

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Train Tracks

How to play: Numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

Binary

How to play: Complete the grid so that each row and column contains two 0s and two 1s. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

Number Hexagon

How to play: Each hexagon is divided into six triangles. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

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How to play: Starting from the start square, you can move up, down, left or right. The numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

Chain Link

How to play: Place the numbers 1-6 in each row, column and diagonal so that the numbers in the grid are the numbers you need to use. The numbers in the grid are the numbers you need to use.

Word Search

How to play: Find the words hidden in the grid. The words in the grid are the words you need to use. The words in the grid are the words you need to use.

Strategies to spend time with news brand readers

- **Find scale** with news brands to reach all demographics across all media platforms.
- **Be part of people's daily routines.** Target right day of the week, or hour in the day to prompt action.
- Tell brand stories in a **flash headline** as well as through **complex depth** stories and advertorials.
- Be present in the relevant news brand content that **meet the best mood** for your audience.

Because Journalism Matters



All Response Media Case study

Oliver Bertwistle

Planning Director, All Response Media



How TouchPoints has powered All Response Media's proprietary **Work.Rest.Play.** planning framework

IPA TouchPoints has always been central to our planning



...but we saw an opportunity for deeper application of the data



Transforming the **application** of TouchPoints
from media insights to marketing insights

+ wider marketing teams / creative partners

... and a need to break down barriers for entry to the data



Transforming the **application** of TouchPoints
from media insights to marketing insights

+ wider marketing teams / creative partners

Democratising **access** to TouchPoints data and
promoting intuitive insight exploration

We built WRPLive to be a marketing insight platform for all



Transforming the **application** of TouchPoints
from media insights to marketing insights

+ wider marketing teams / creative partners



Democratising **access** to TouchPoints data and
promoting intuitive insight exploration

Work.Rest.Play.

We believe people exist in three core behavioural states



Work

time spent on activities related to the completion of tasks, or to a profession. This time is spent with a high degree of focus and with the emphasis of the activity placed on productivity. Post-pandemic shifts to working patterns have resulted in a greater fluidity to when this phase fits into the day now.



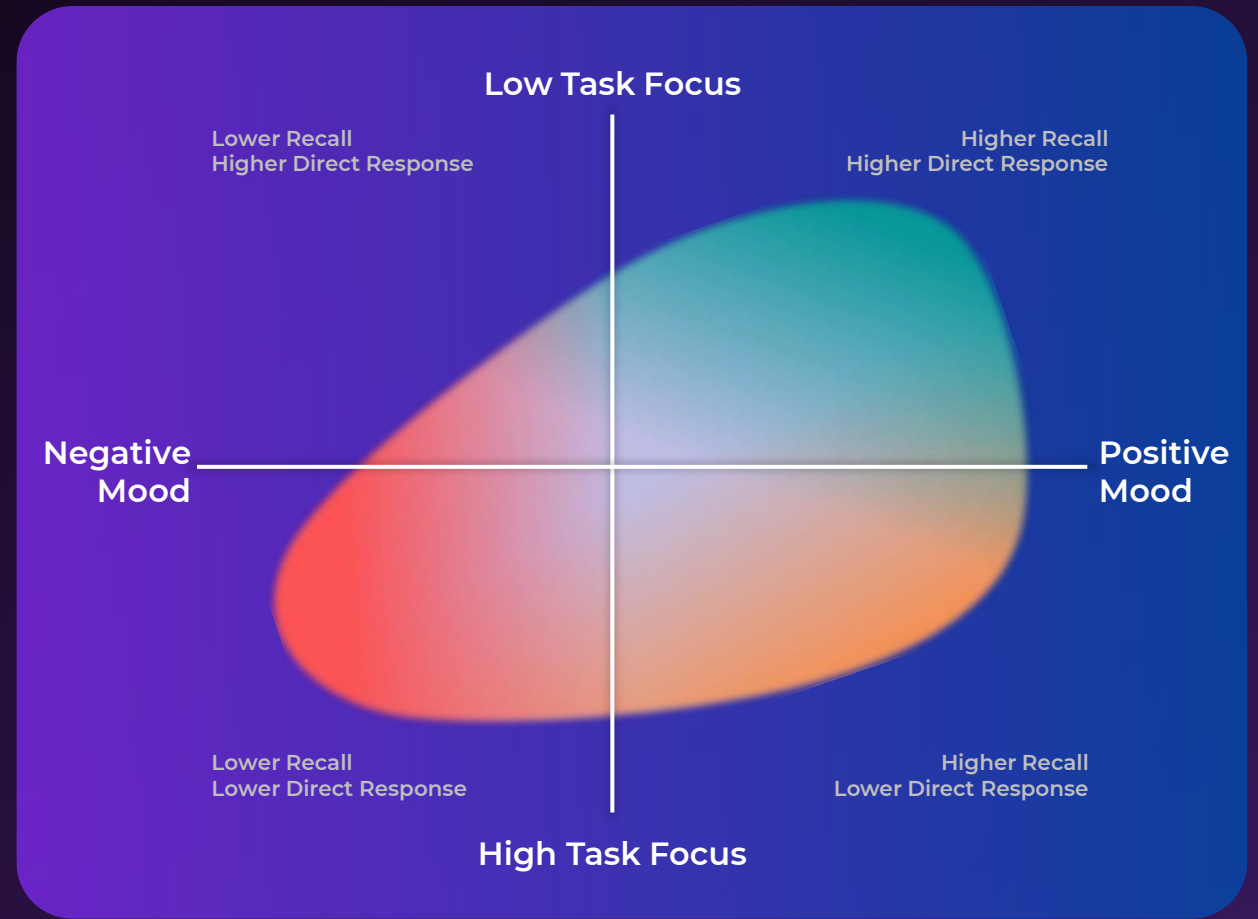
Rest

leisure time spent on relaxation and recuperation and, often, the home is a key component in this dynamic. The audience are in “lean back” mindset during this phase and have a greater openness to new distractions.



Play

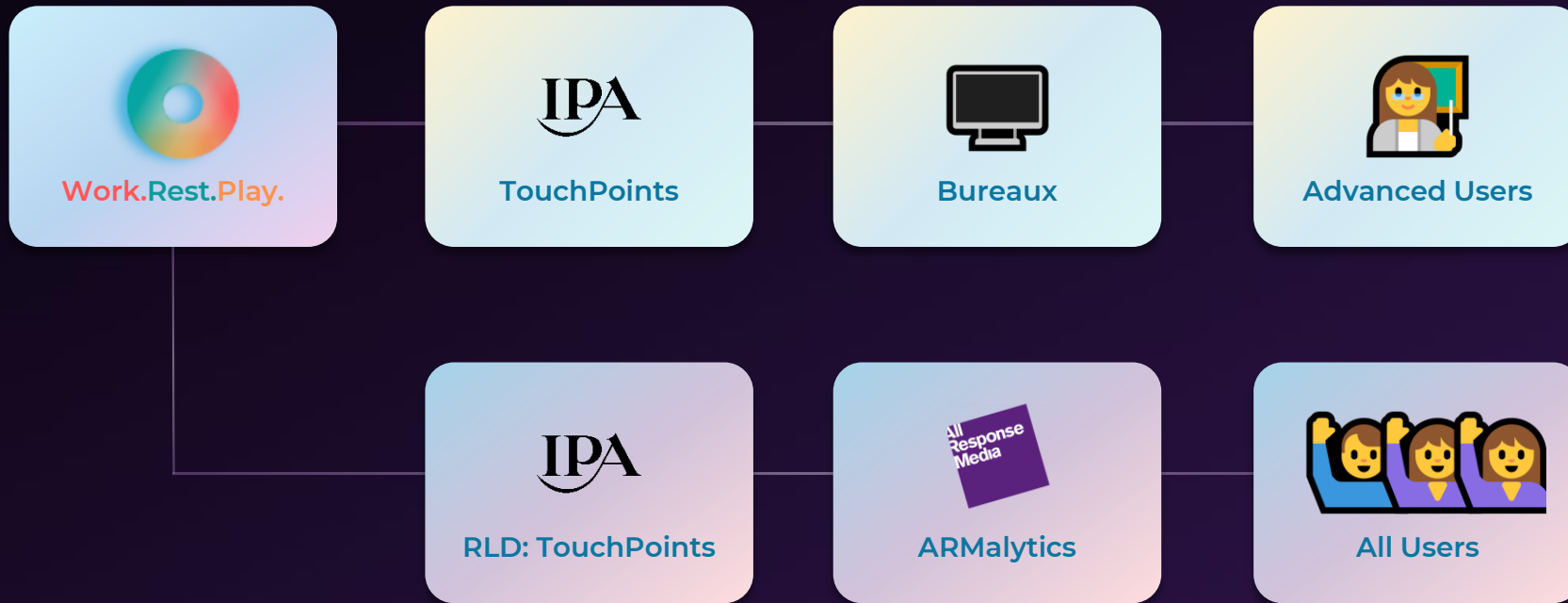
time when people are participating in the activities that bring them the most enjoyment - this is a broad spectrum from hobbies to families and friends. Regardless, during this state the audience are less open to non-relevant distractions.



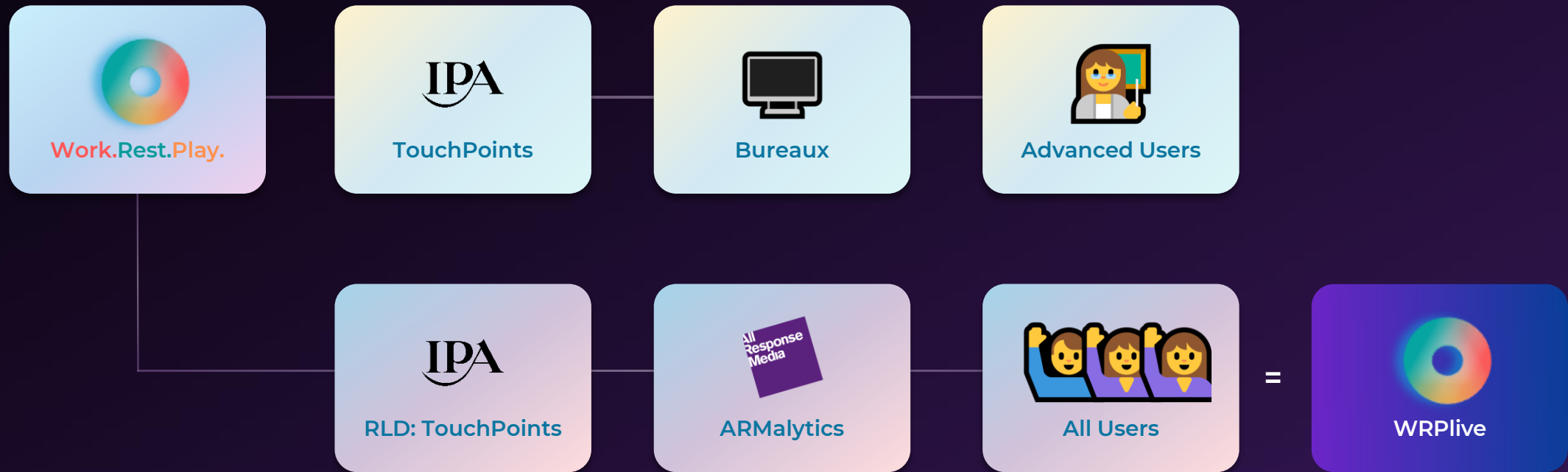
Work.Rest.Play. via TouchPoints was powerful, but complex to access and analyse - meaning use cases were limited



Respondent Level TouchPoints data enabled us to build our own tool for easy and universal access to Work.Rest.Play. insights



Respondent Level TouchPoints data enabled us to build our own tool for easy and universal access to Work.Rest.Play. insights



WRPlive is marketing insight platform for all



Credibility and confidence



Quick to surface powerful insights



Intuitive and engaging



Omnichannel for unbiased outcomes



Framed via **Work.Rest.Play.** lens



Aligned with measurement stacks

Audience-first
planning via
Work.Rest.Play. has
delivered better client
business outcomes



+52%

Increase in key brand sentiment metric for LinkedIn following the activation of layered multi-channel WRP media plan, which tied media and creative to the mind state, mood and behaviour of the target audience



**WRPlive has
democratised and
multiplied access to
rich, actionable
marketing insights**

x2.49

Increase in utilisation of TouchPoints data since the rollout of WRPlive 2.0 across the agency, compared to pre-WRPlive benchmark of user access via bureaux

Work.Rest.Play.



Whitepaper release in Q3



feat. a
foreword by
IPA



sign up

Audience-First Performance:
How connecting with the mindset and mood of audiences at Work, Rest and Play is a catalyst for better brand and business outcomes from advertising campaigns.

The fundamental attribution error is the tendency people have to overemphasize personal characteristics and ignore situational factors in judging others' behaviour. In other words, the valuing of personality over situation to explain response. Because of the fundamental attribution error, we tend to believe that others do bad things because they are bad people, without taking the situation into account. In a marketing context, this is akin to focusing all campaign development efforts on a target persona, without taking mood and mindset at the point when they will receive the asset into account. Correcting this requires acknowledgement that mood and mindset are shaped by the situational contexts our targets pass through on any given day (which can be mapped in media). For us, such moods and mindsets are most usefully mapped when the audience is at Work, Rest and Play:

Work
Time spent on activities related to the completion of tasks, or to a profession. This time is spent with a high degree of focus and with the emphasis of the activity placed on productivity.

Rest
Leisure time spent on relaxation and recuperation and, often, the home is a key component in this dynamic. The audience are in "lean back" mindset and have a greater openness (and responsiveness) to new distractions.

Play
Time when people are participating in activities that bring them the most enjoyment - a broad spectrum from hobbies to families and friends. During this state the audience are less open to non-relevant distractions.

While the Work and Play mind states are more task oriented and focused, the Rest phase has a greater openness for distraction and new actions, resulting in a greater likelihood of immediate response to a new prompt. With each campaign, we explore the right blend of WPR to meet objectives.

- Work, Rest, Play Planning considerations:**
- Understand the impact of Work, Rest and Play on mindset, mood, and response.
 - Plan media connections and assets served based on Work, Rest, Play mindset and mood.
 - Align investment allocations based on Work, Rest, Play contribution to desired outcomes.

Work, Rest, Play, advertising assets, and the Mood Behaviour Model

The mood-behaviour model (MBM), (Gendolla, 2000) illustrates that moods play significant roles in 1) The constitution of action preferences, and 2) resource mobilization in instrumental behaviour (action performed to reach a goal). I.e. Helping us decide what we want to do, and motivating us to do it. By incorporating both preference and action, this is a step beyond the well documented understanding that reaching people in positive moods can boost their likelihood to notice, like, believe and recall ads. (Stanley, 2023; Bronner, 2007), which in turn is

Thank you

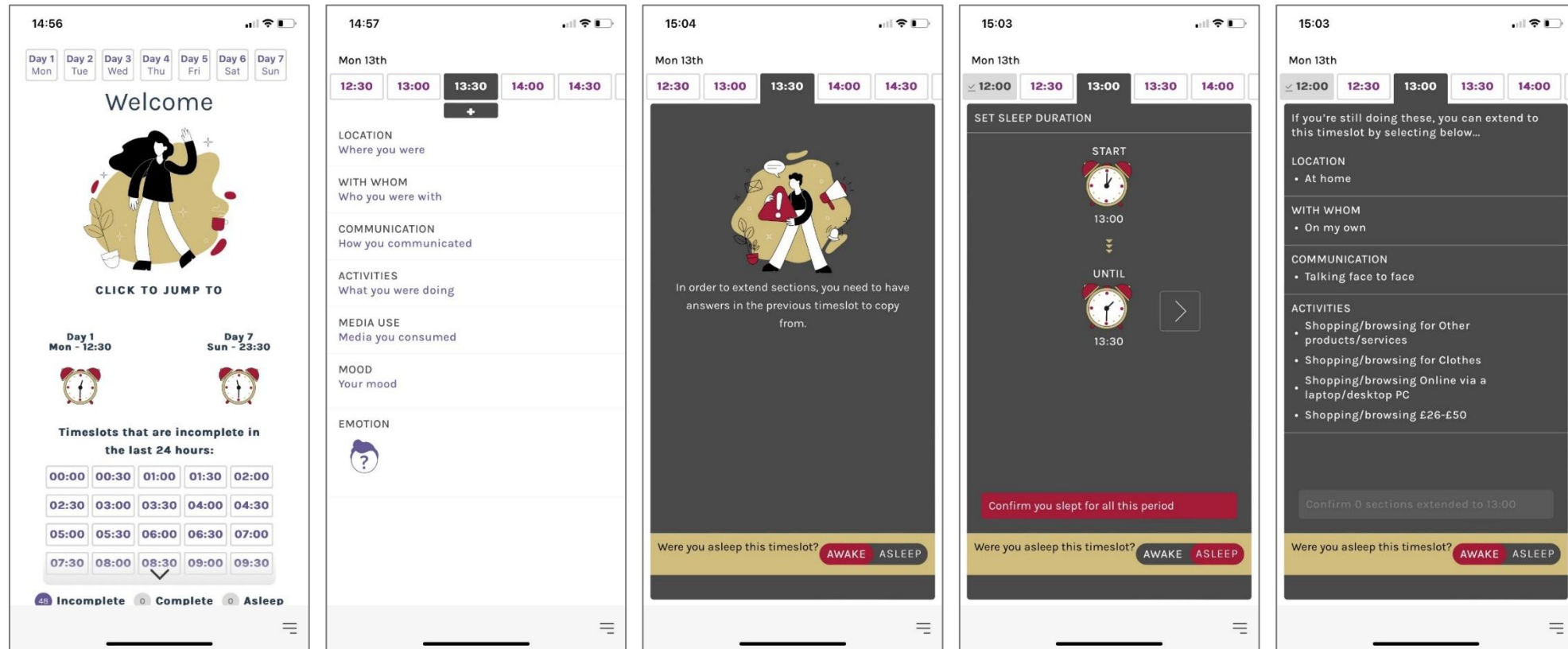
Building businesses and brands
by giving clients an
Unfair Competitive Advantage

TouchPoints: The Latest Data

Dan Flynn

Deputy Research Director, IPA

New data collection app for time diary



iPhone XR, Safari

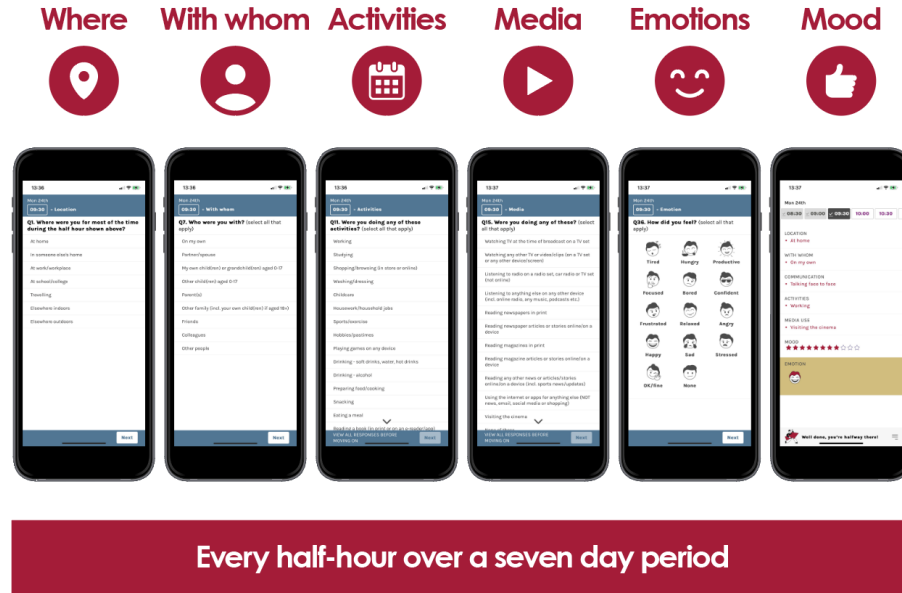
TouchPoints: designed as a multimedia planning tool



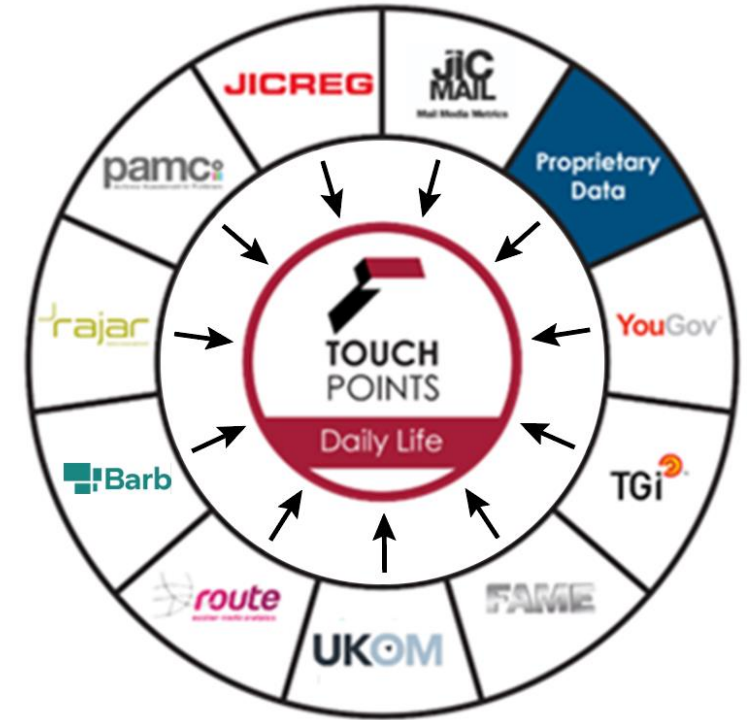
TouchPoints Questionnaire 2023
Ipsos

Thank you for taking part!
Any queries, call our free helpline:
0800 238 5492
(standard rate: 0131 661 4636)
or email: touchpoints@ipsos.com

Where **With whom** **Activities** **Media** **Emotions** **Mood**



Every half-hour over a seven day period



Daily Life Survey

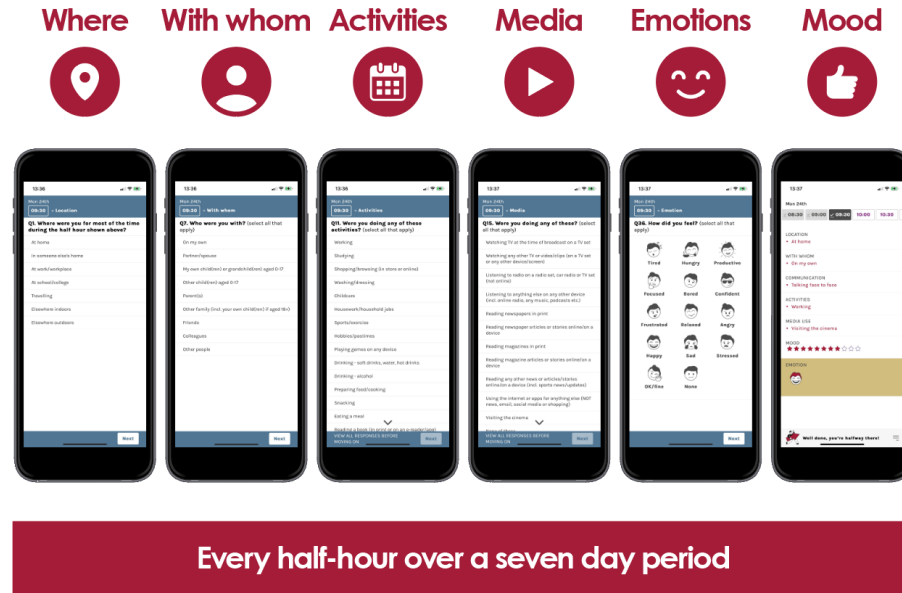
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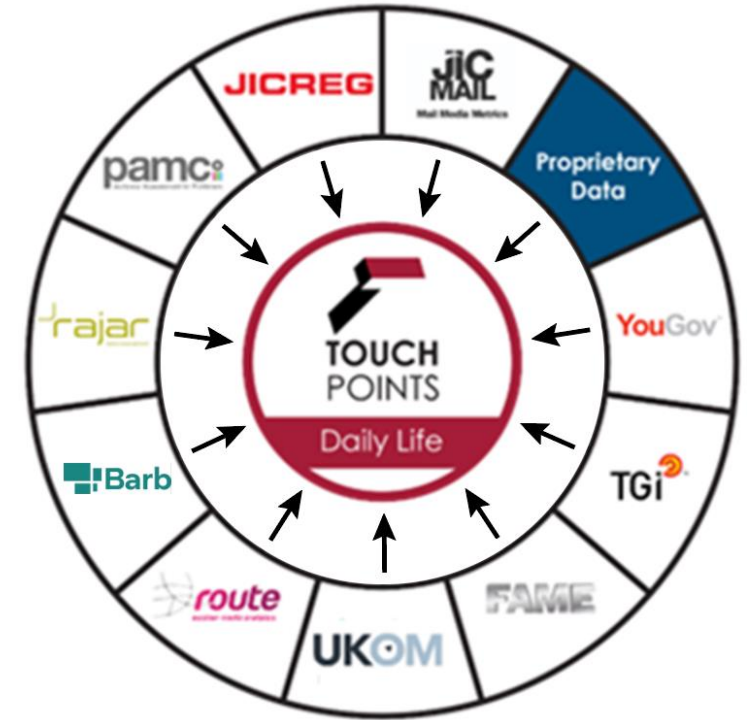
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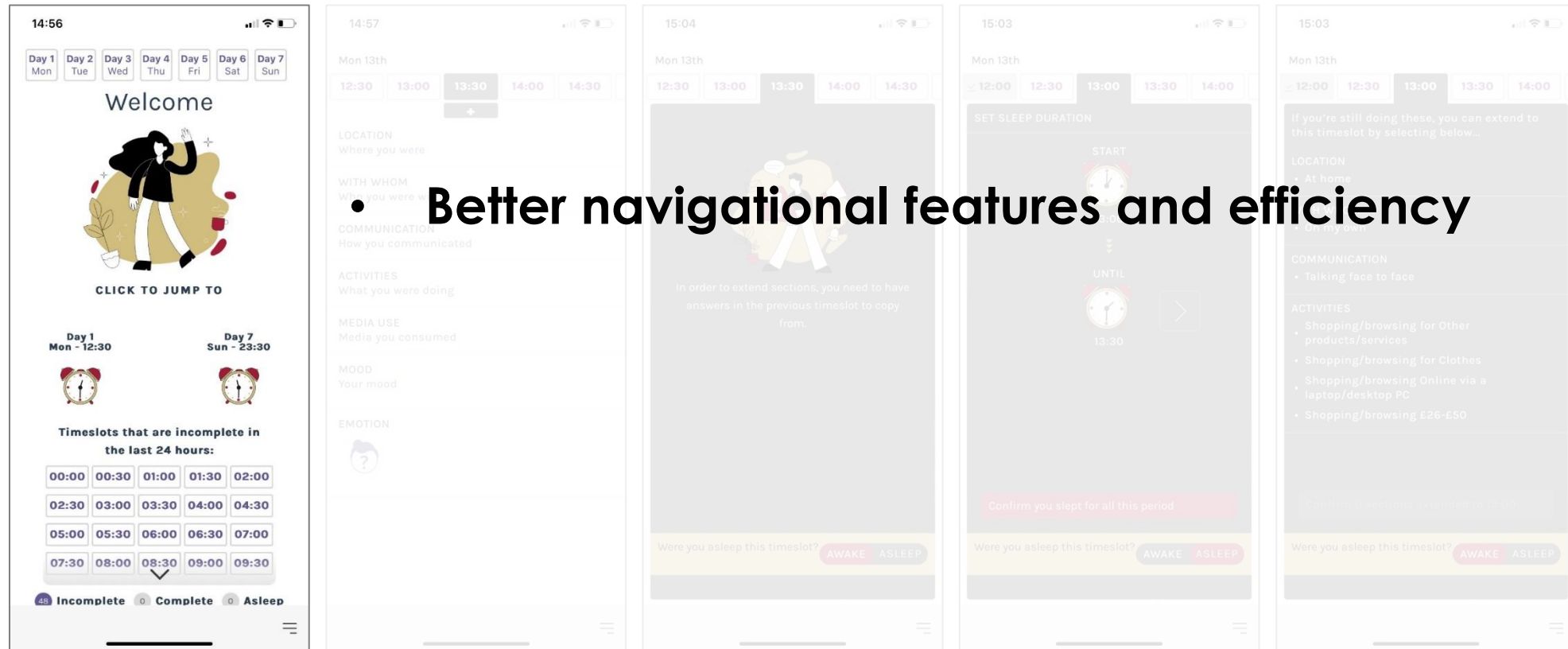


Every half-hour over a seven day period

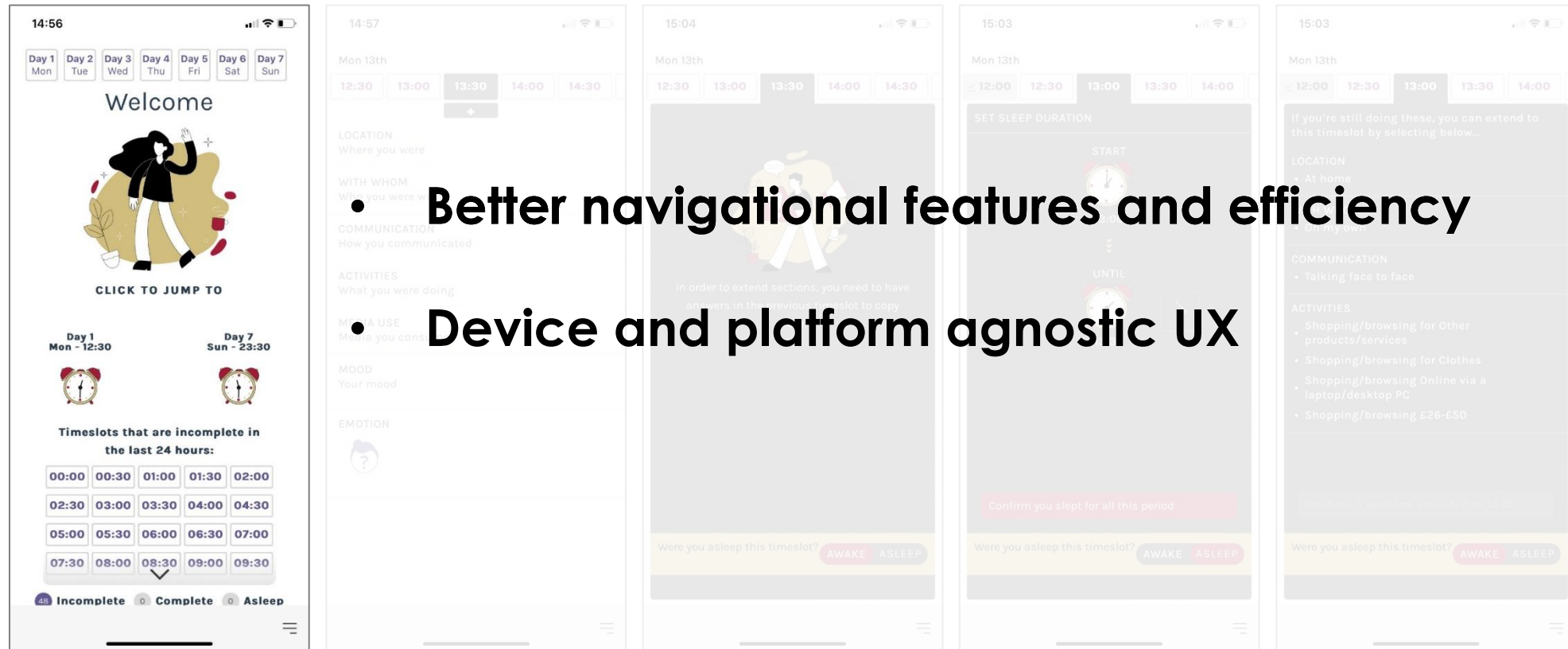


Channel Planner

New data collection app for time diary



New data collection app for time diary

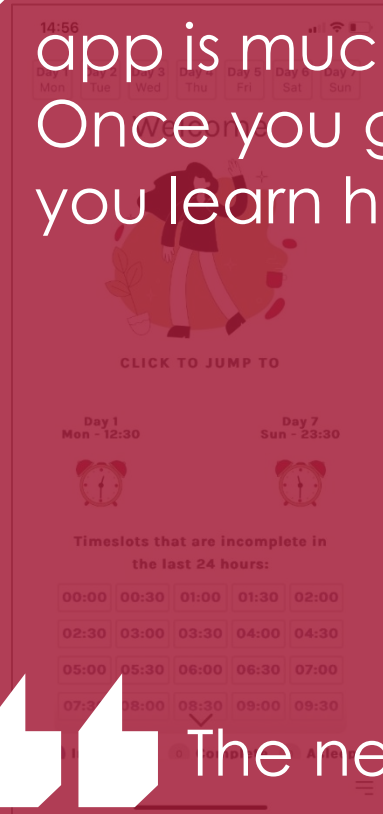


New data collection app for time diary



The old diary is very time consuming, the new app is much **more convenient, it's easier.**

Once you get the gist of it, it's **user-friendly,** you learn how to do it. It's great to be honest.



- Better navigational features and efficiency



- Device and platform agnostic UI

This is quicker compared to the other one... this is **much better, much cleaner, much clearer.**



The new diary has got more colour; **it looks like something worth doing.**



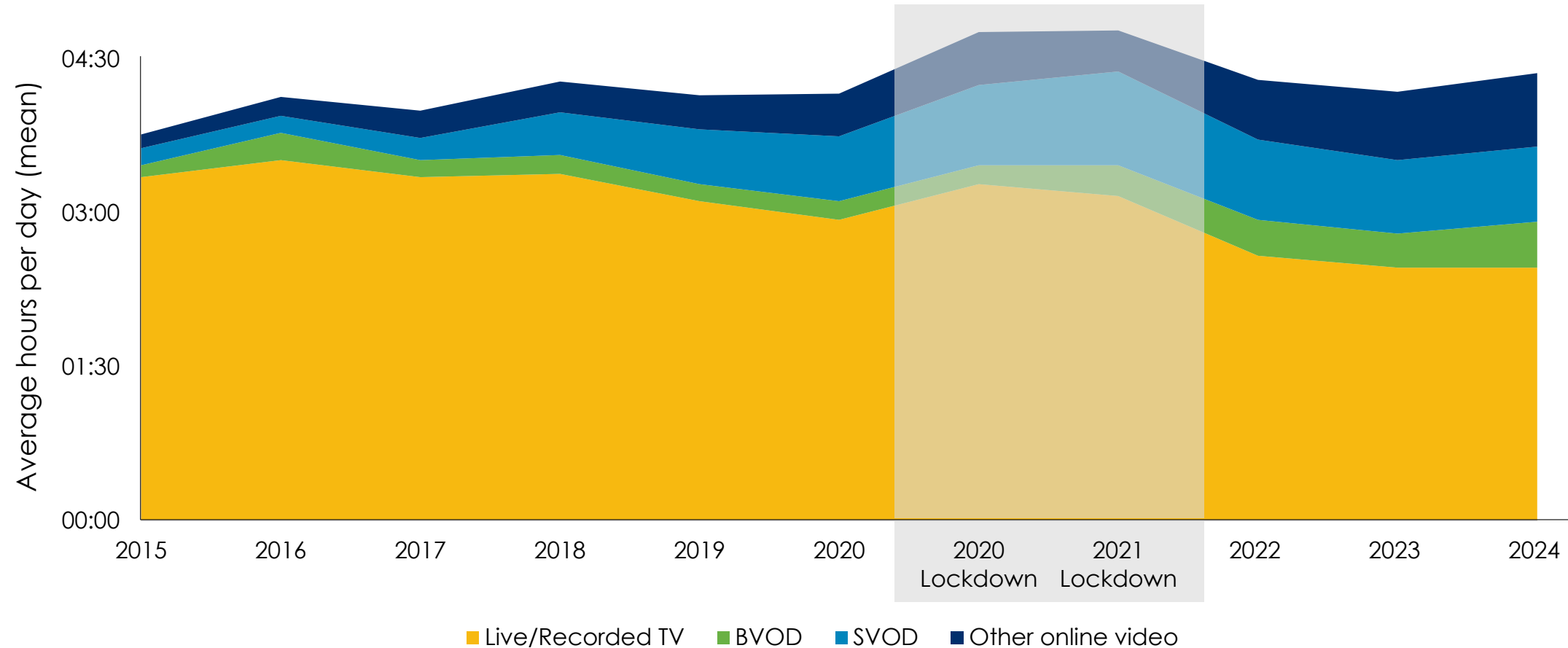
New data collection app for time diary



- Better navigational features and efficiency
- Device and platform agnostic UX
- Better quality data on a future facing platform

Evolution not revolution in data collection

Categories of viewing 2015–24 (mean hours)

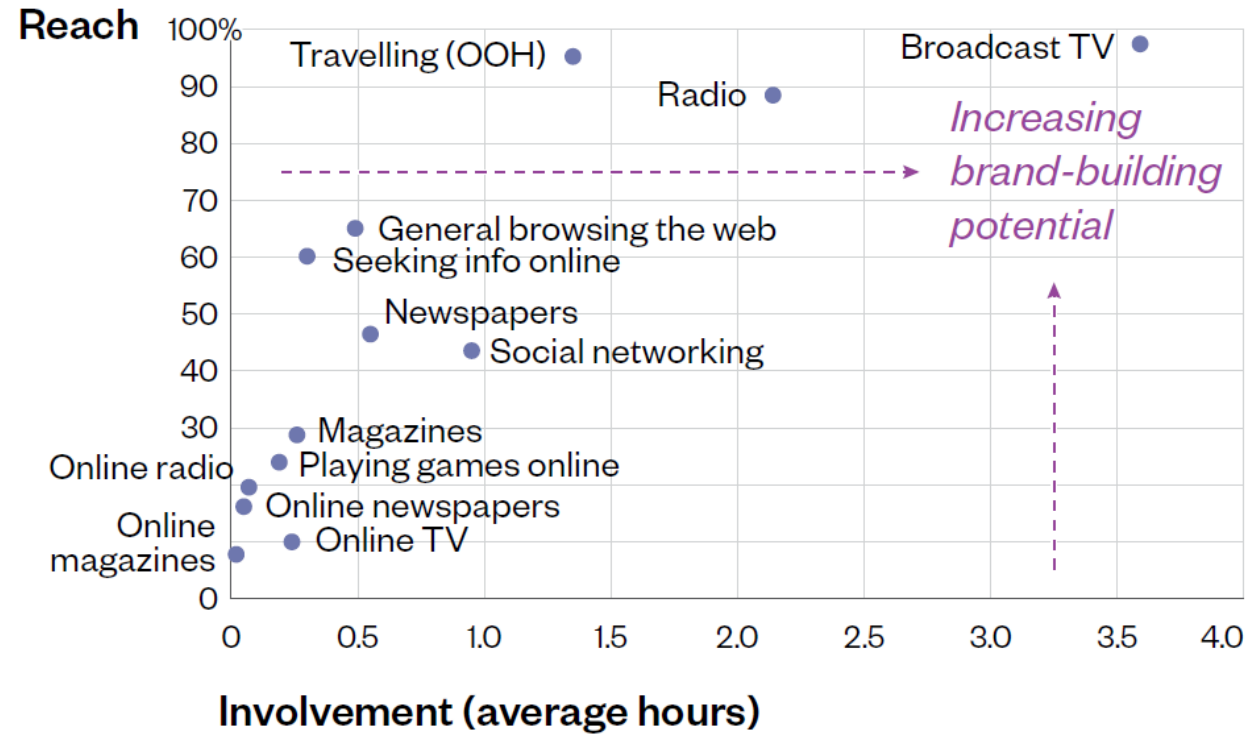


Emotionally-involving communications tend to produce bigger effects, especially over the long term. Using IPA TouchPoints data, Fig 39 plots the reach of various channels in the UK against a proxy measure of their involvement: the average hours consumers spend with them. Channels in the top right of the chart can be expected to excel brand building because they have both high reach and high involvement.

Channels in the bottom left are less likely to be less so (but may represent powerful activation channels). Thus TV, radio, posters and the internet (as a display medium) might all be expected to have above average brand building potential, whilst print in general might be expected to be below average.

This mirrors quite closely the patterns of brand effects recorded in the Databank, measured by comparing the proportion of campaigns using each channel that achieved any very large brand effects, with the proportion of those that did not use each channel

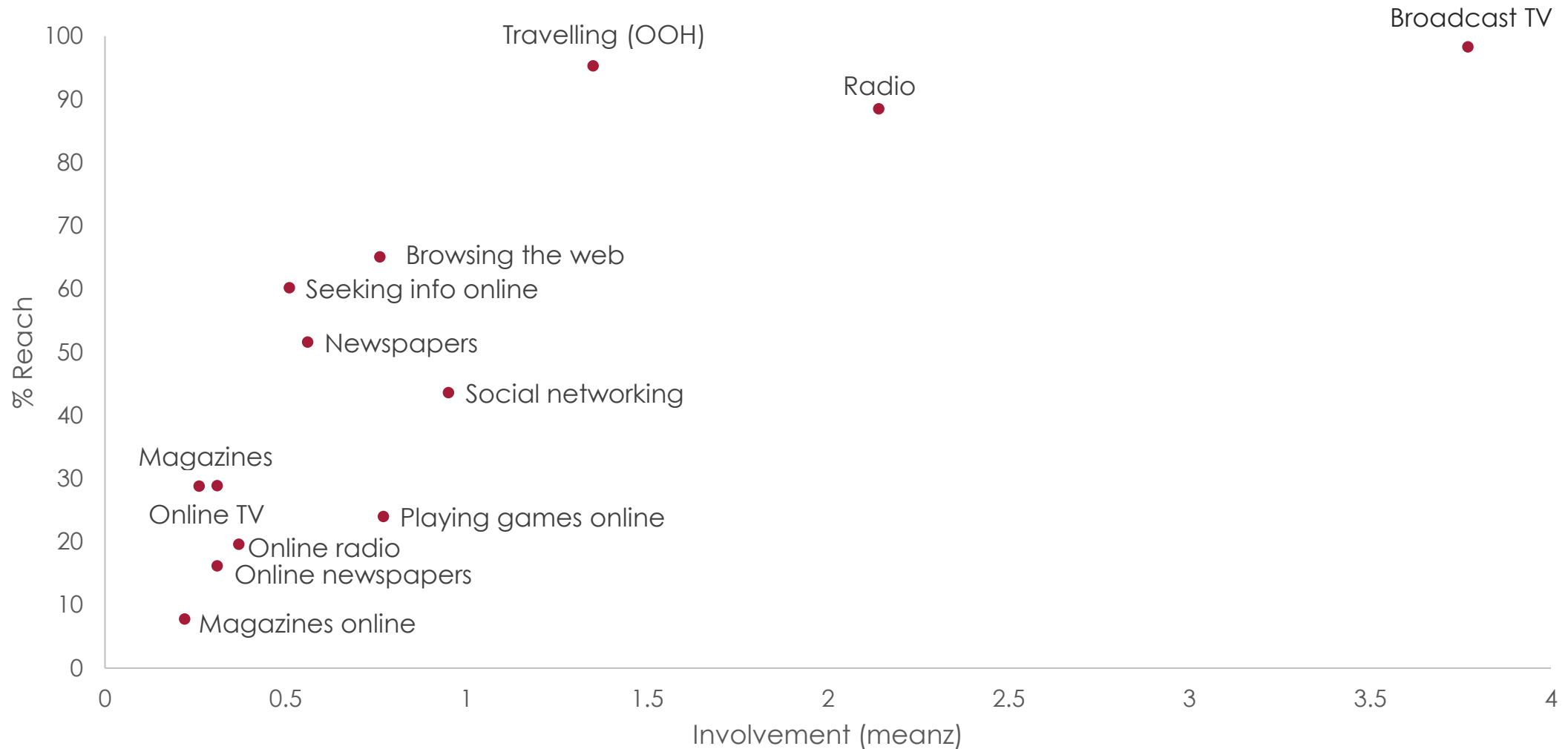
Figure 39 The reach and involvement of UK channels



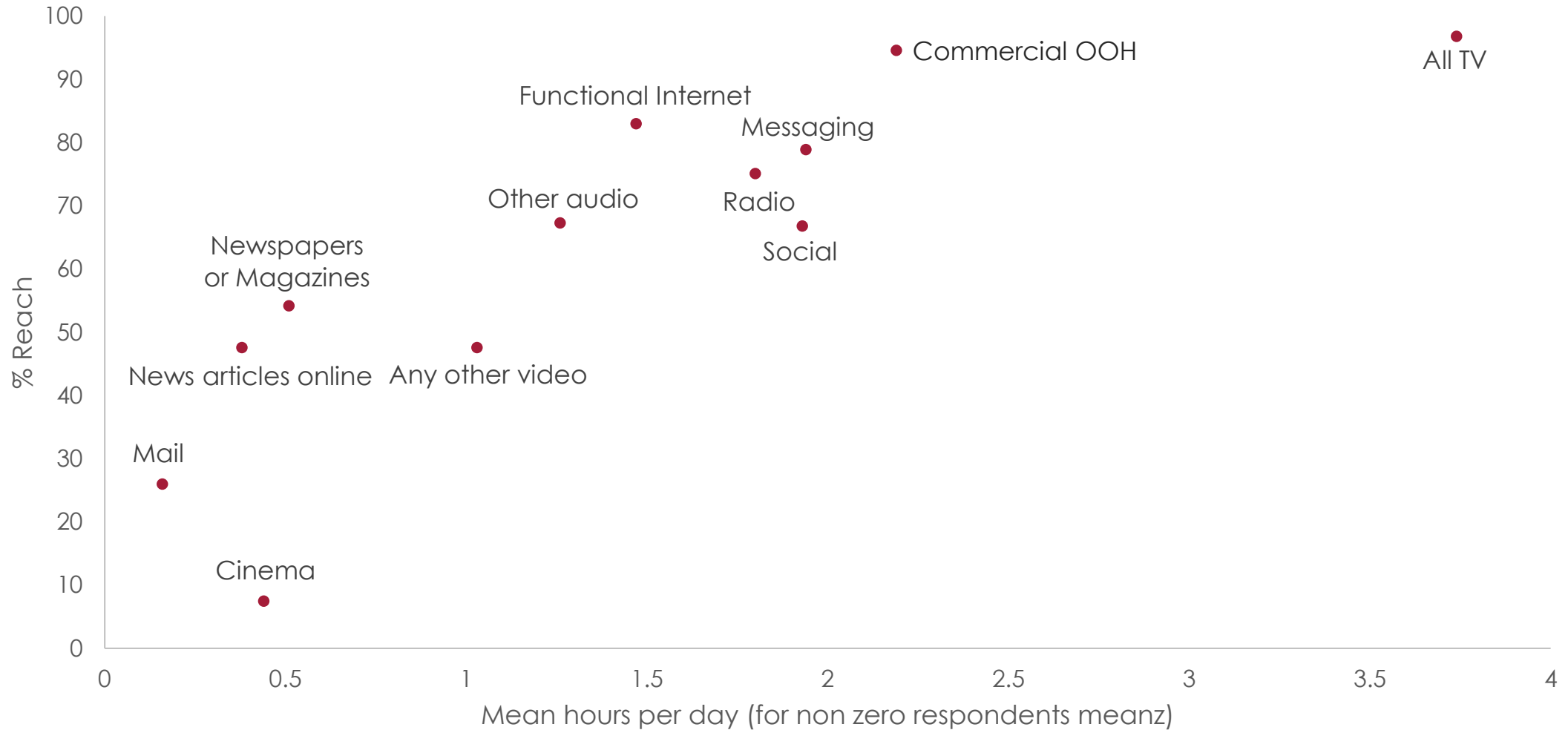
Source: Touchpoints 2012, adults



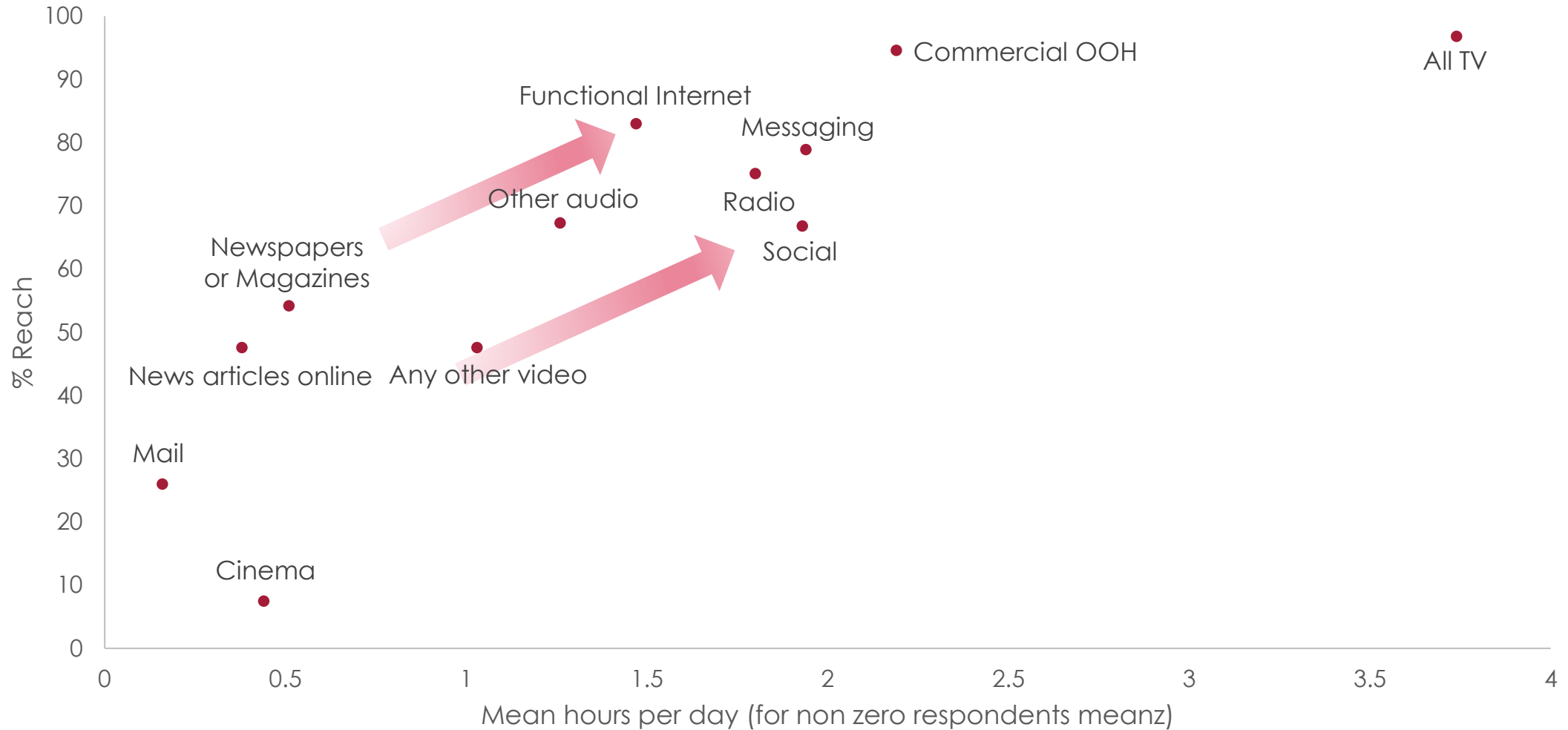
Reach and involvement of UK channels 2012



All media landscape in 2024

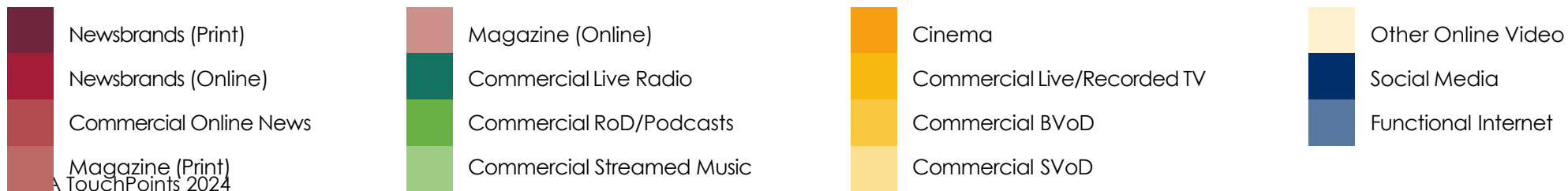
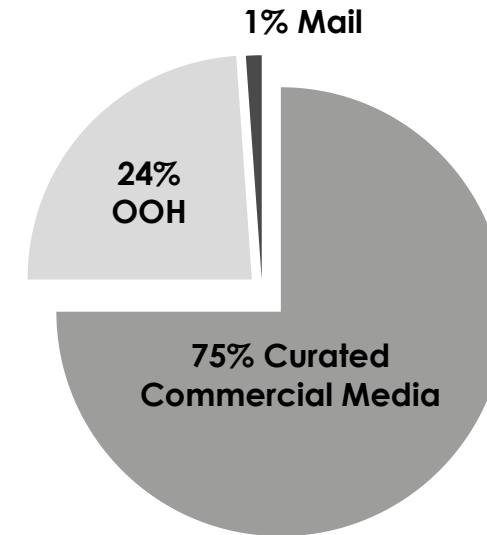
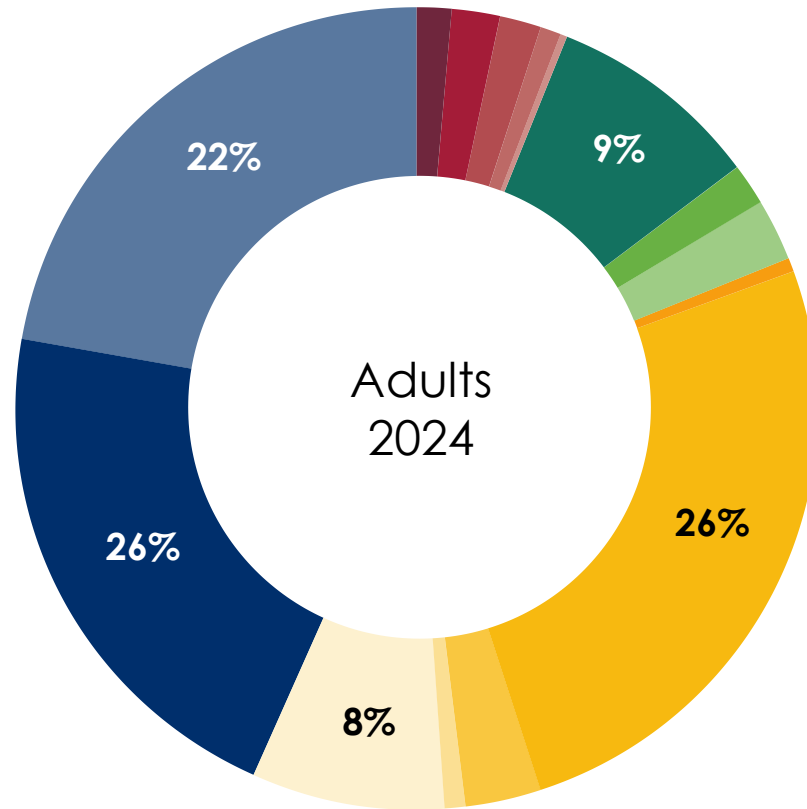


All media landscape in 2024



Life was simpler then....

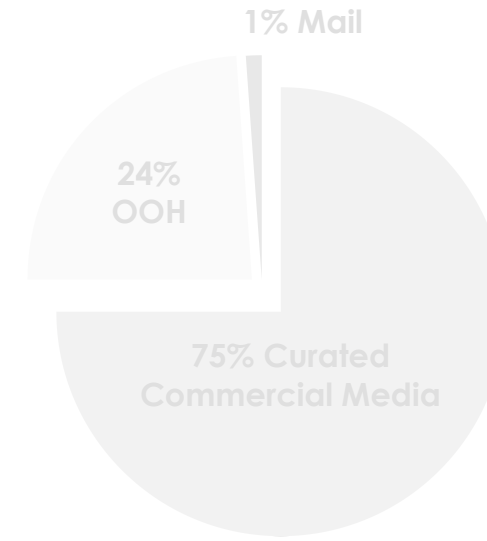
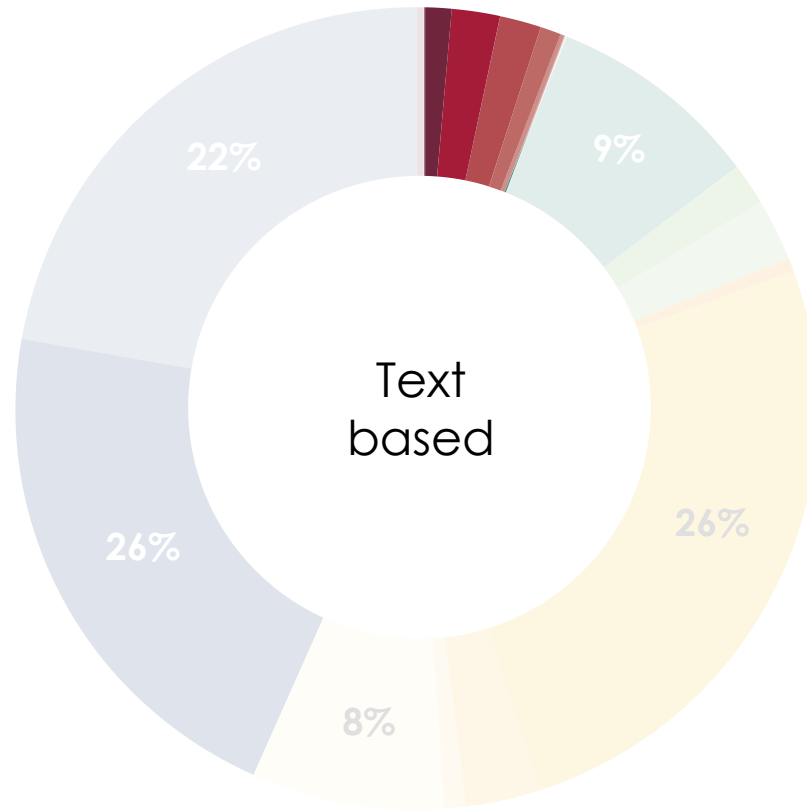
Share of all **commercial** media in 2024 using definitions from Making Sense



Source: IPA TouchPoints 2024 Adults

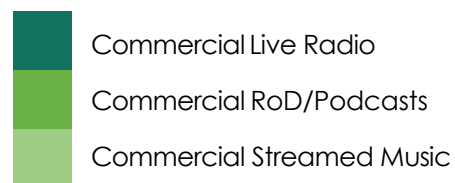
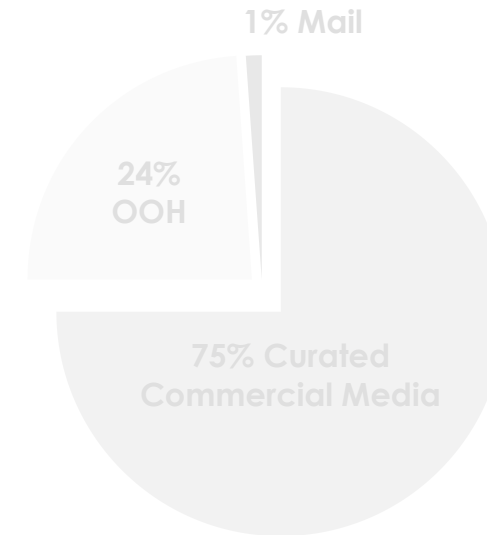
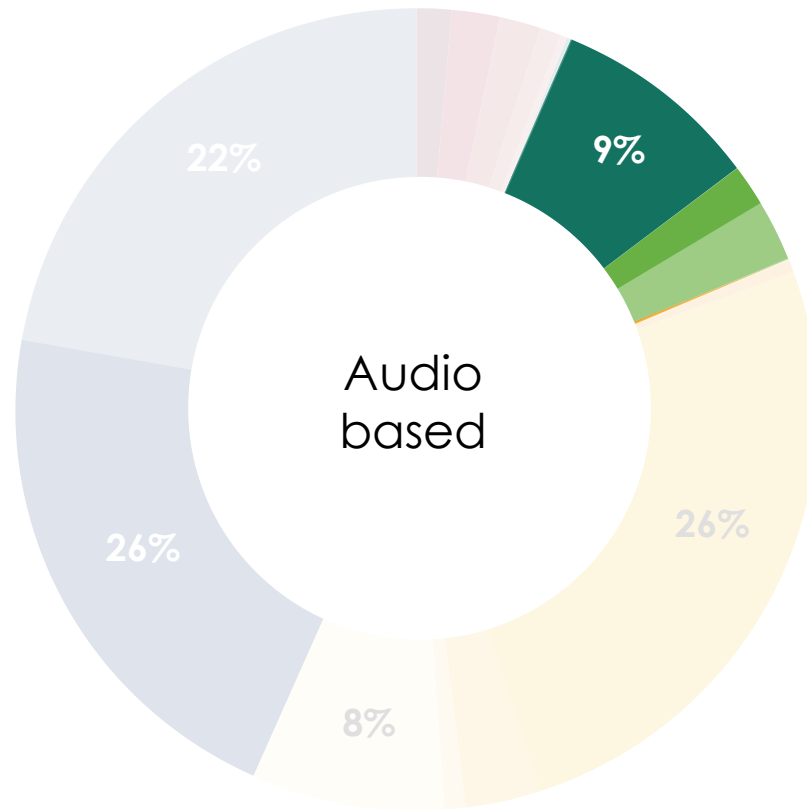


Share of all commercial media 2024

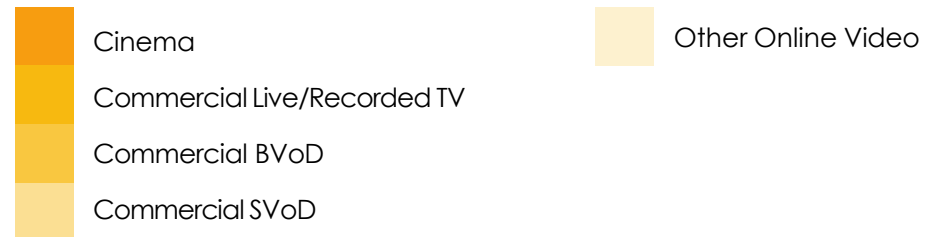
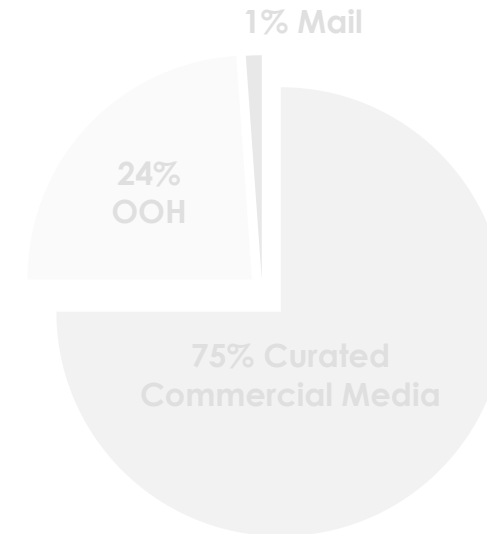
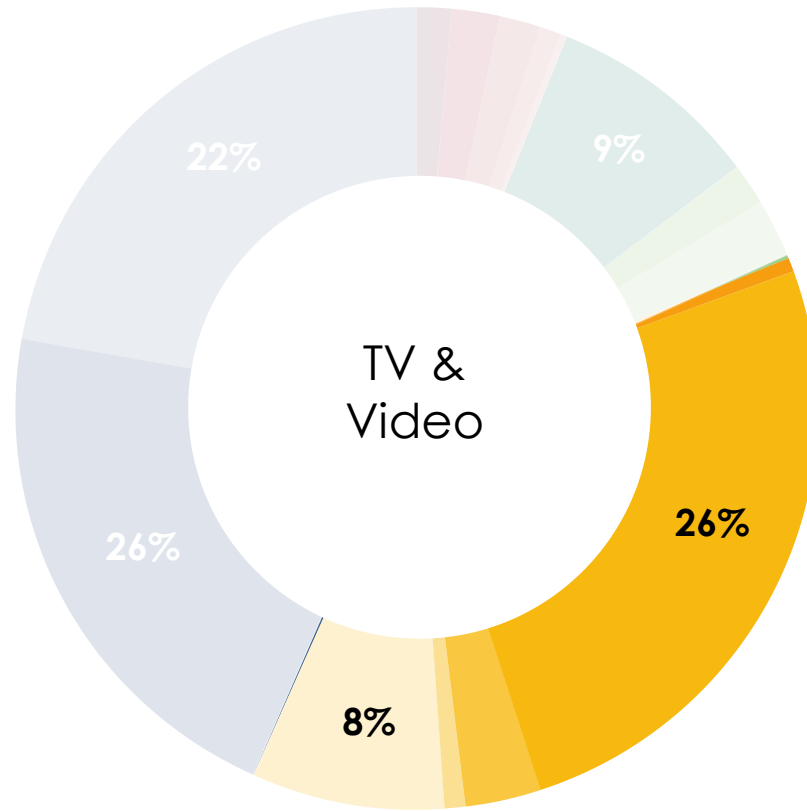


- Newsbrands (Print)
 - Newsbrands (Online)
 - Commercial Online News
 - Magazine (Print)
 - Magazine (Online)
- TouchPoints 2024

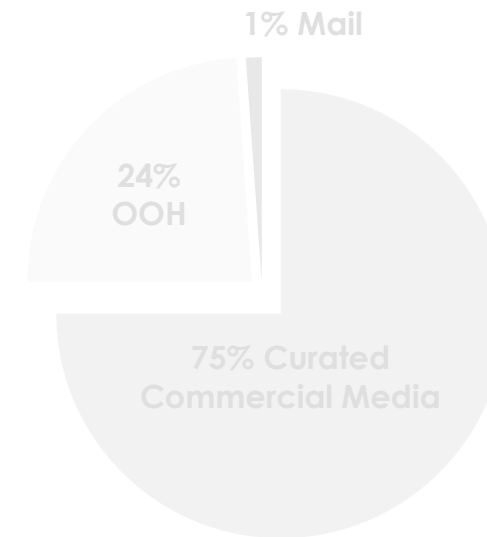
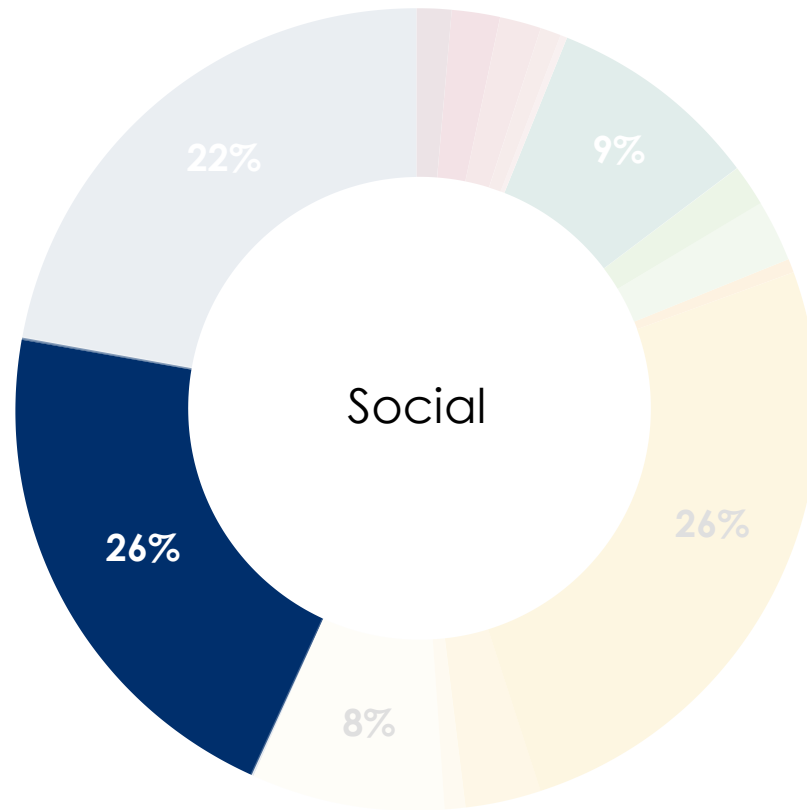
Share of all commercial media 2024



Share of all commercial media 2024

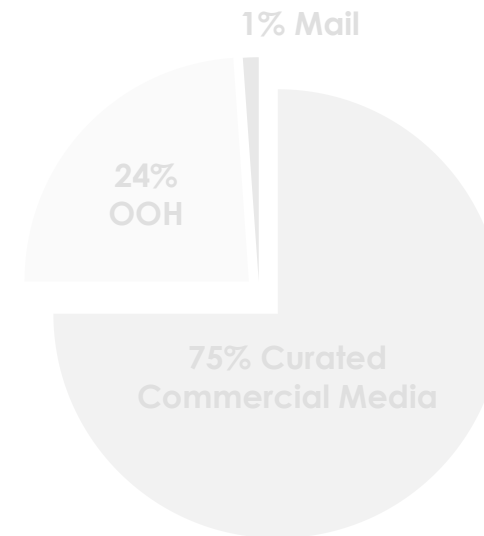
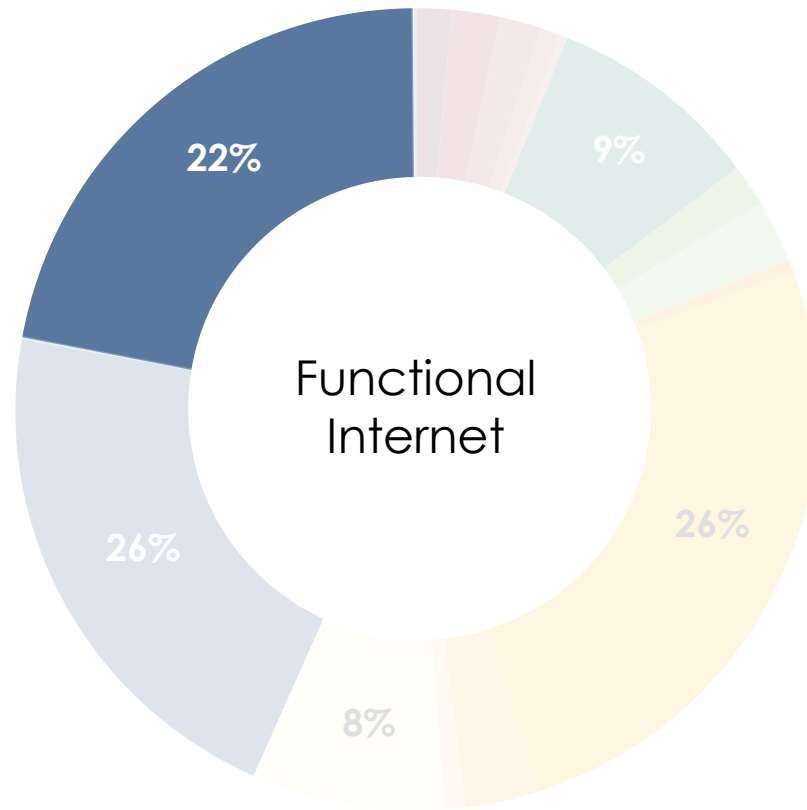


Share of all commercial media 2024



 Social Media

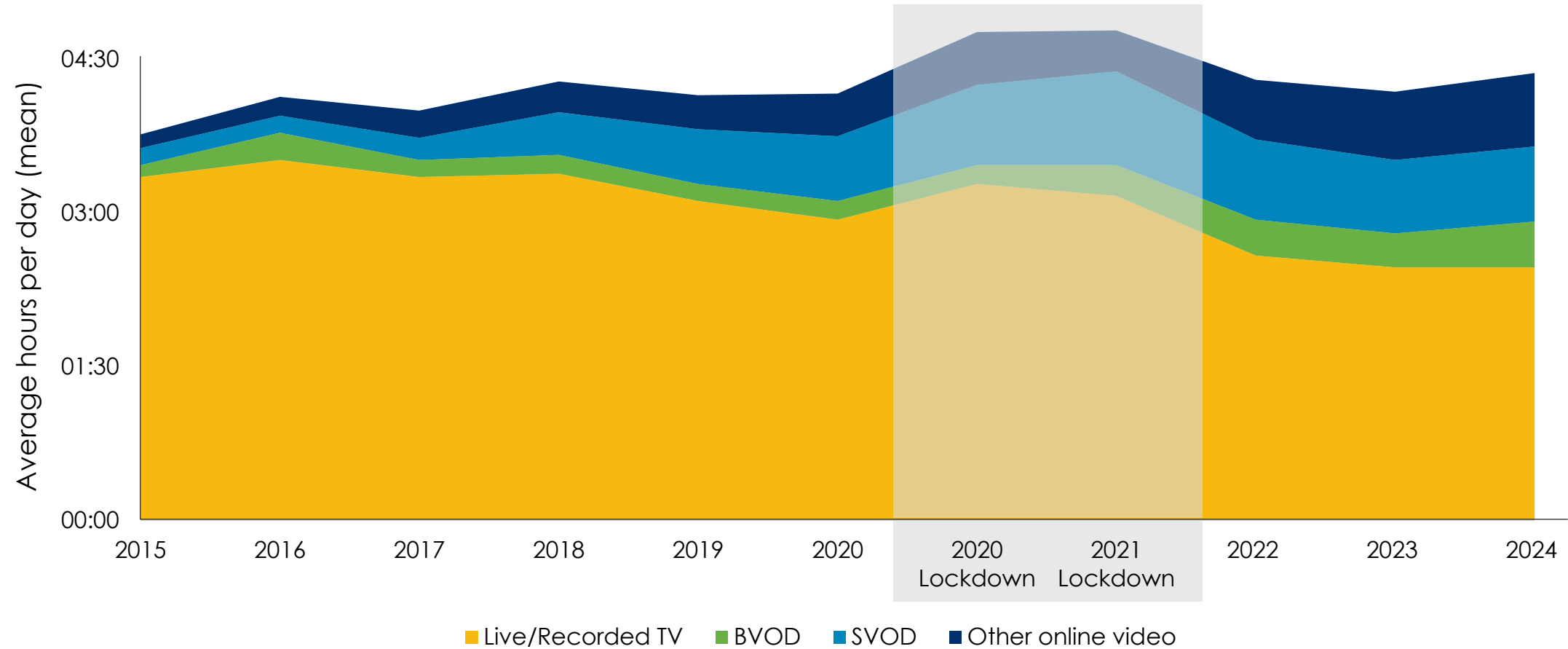
Share of all commercial media 2024



Functional Internet

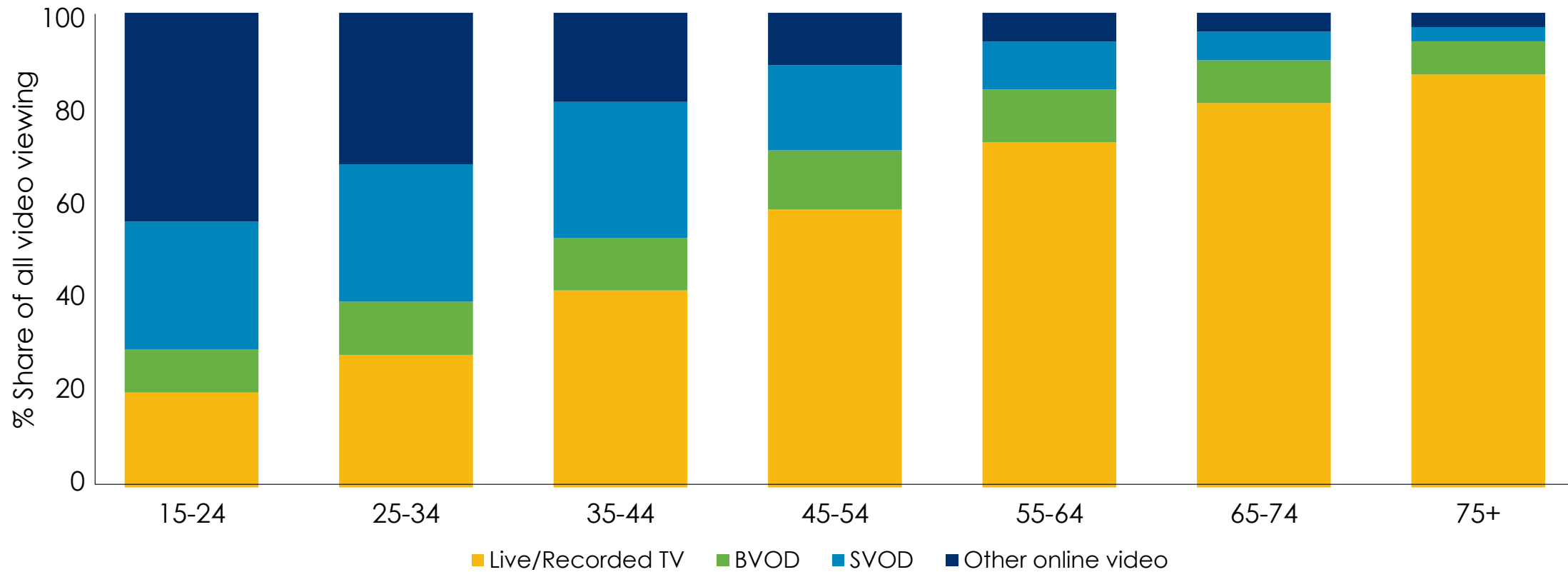
All TV and video types

Categories of viewing 2015–24 (mean hours)



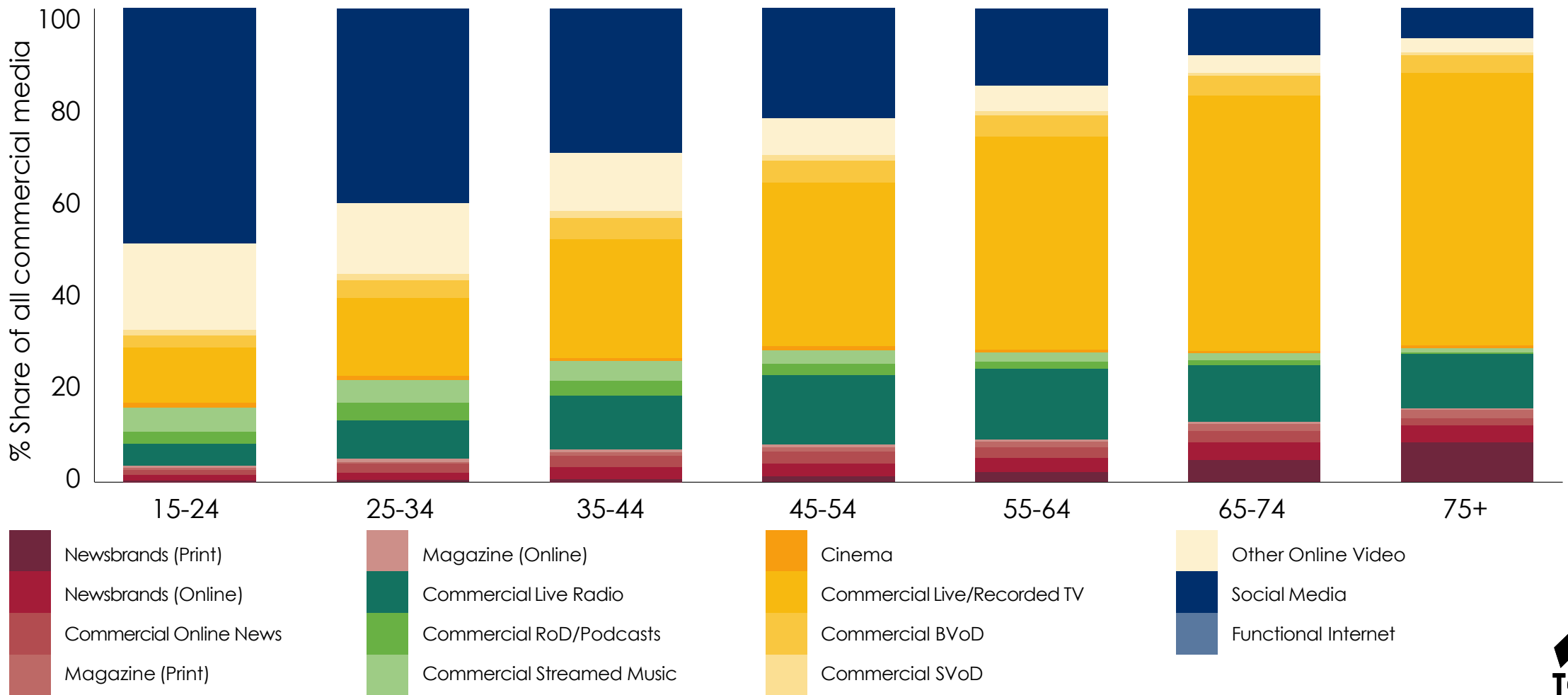
Age is the biggest discriminator

TouchPoints 2024 – share of viewing by age group



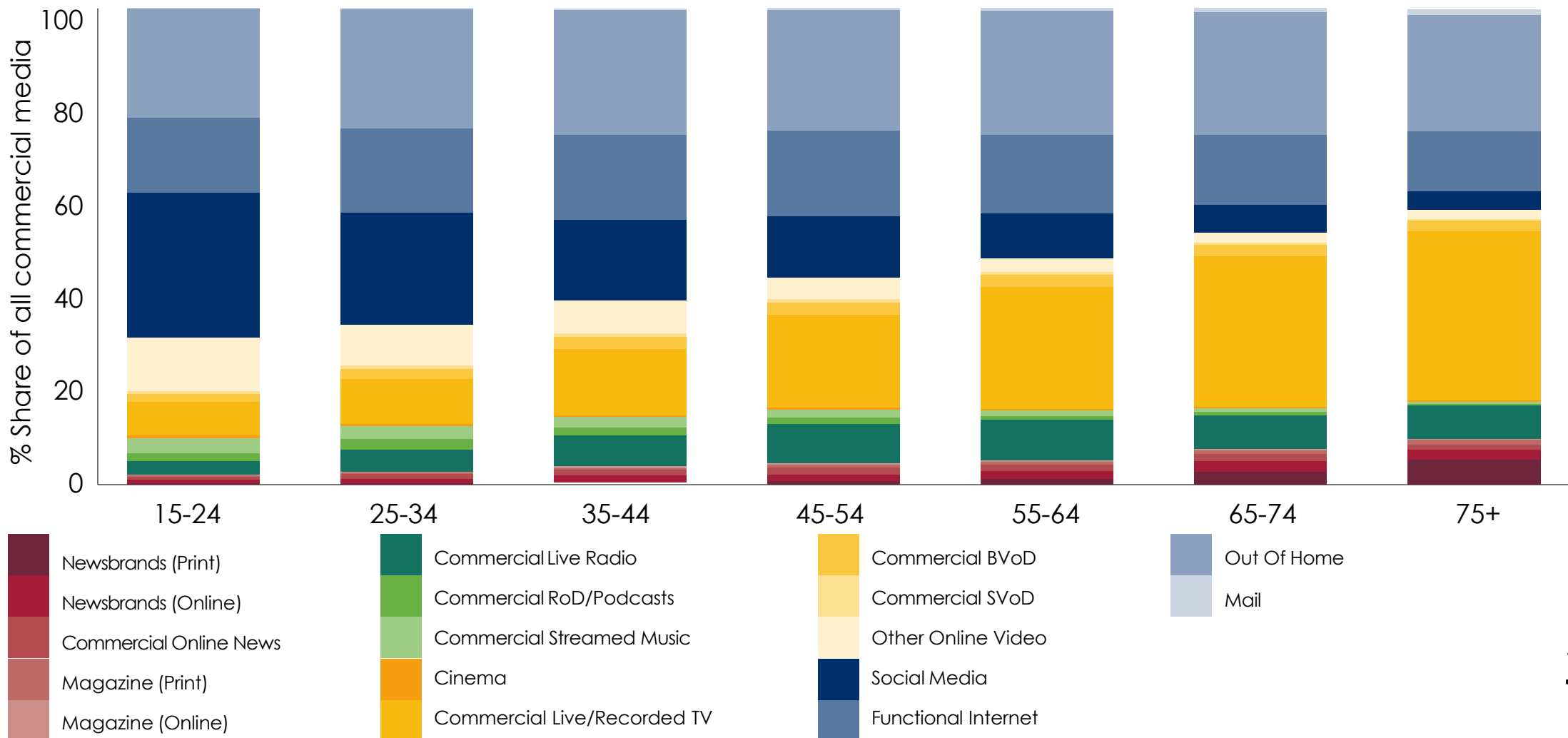
Age is the biggest discriminator

Commercial Media - excluding OOH, Functional Internet, Mail



OOH & functional internet deliver across all age groups

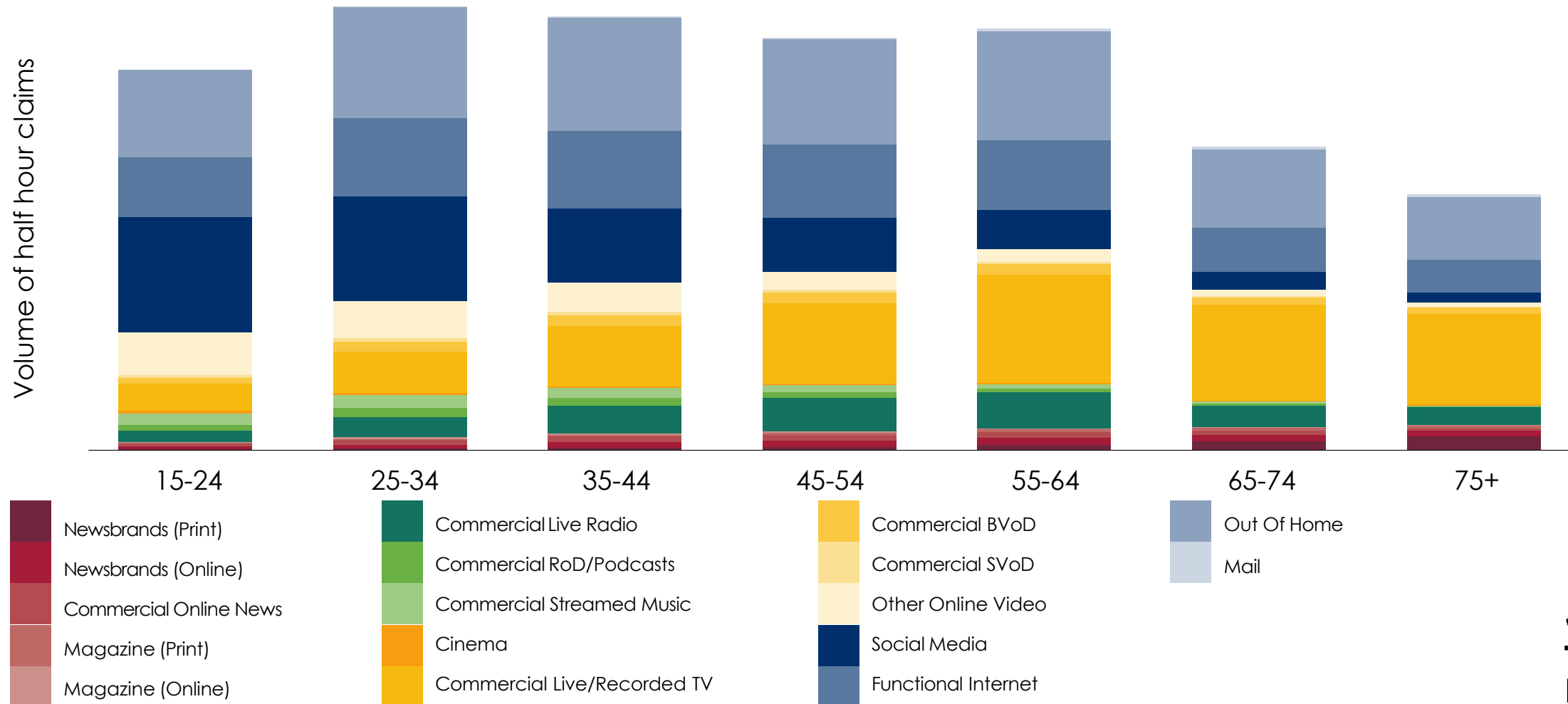
Commercial Media including Mail, OOH, Functional Internet



Source: IPA TouchPoints 2024 share of Commercial Media using gross half hour claims

...but beware of volumes as well as share

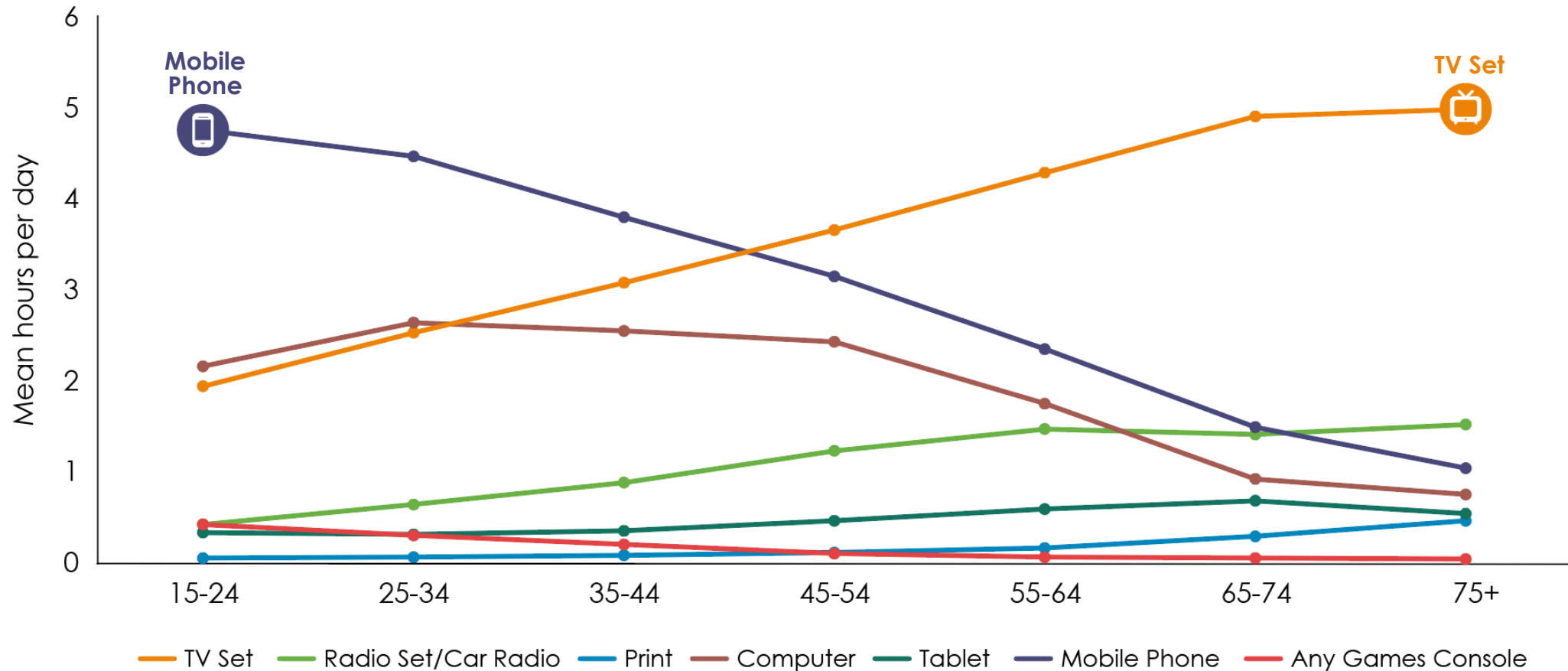
Commercial Media including Mail, OOH, Functional Internet



Source: IPA TouchPoints 2024 total gross half hour claims

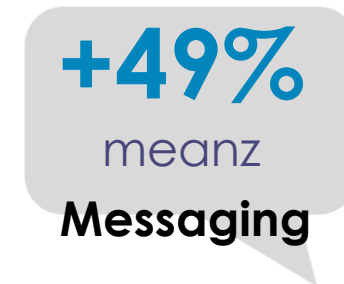
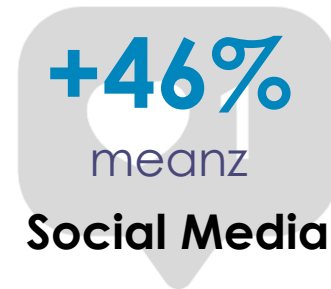
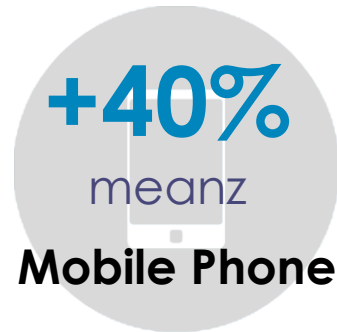
Young people really love their phones

Time spent consuming media by device



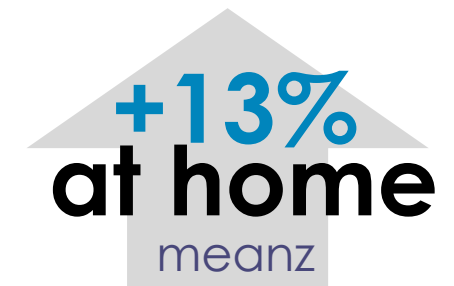
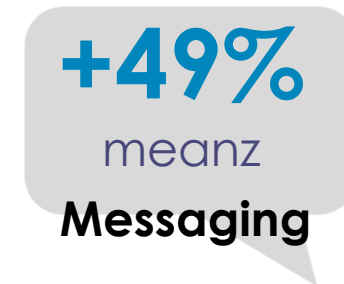
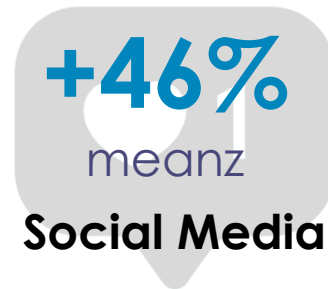
15-24's

Percentage change from 2015-24



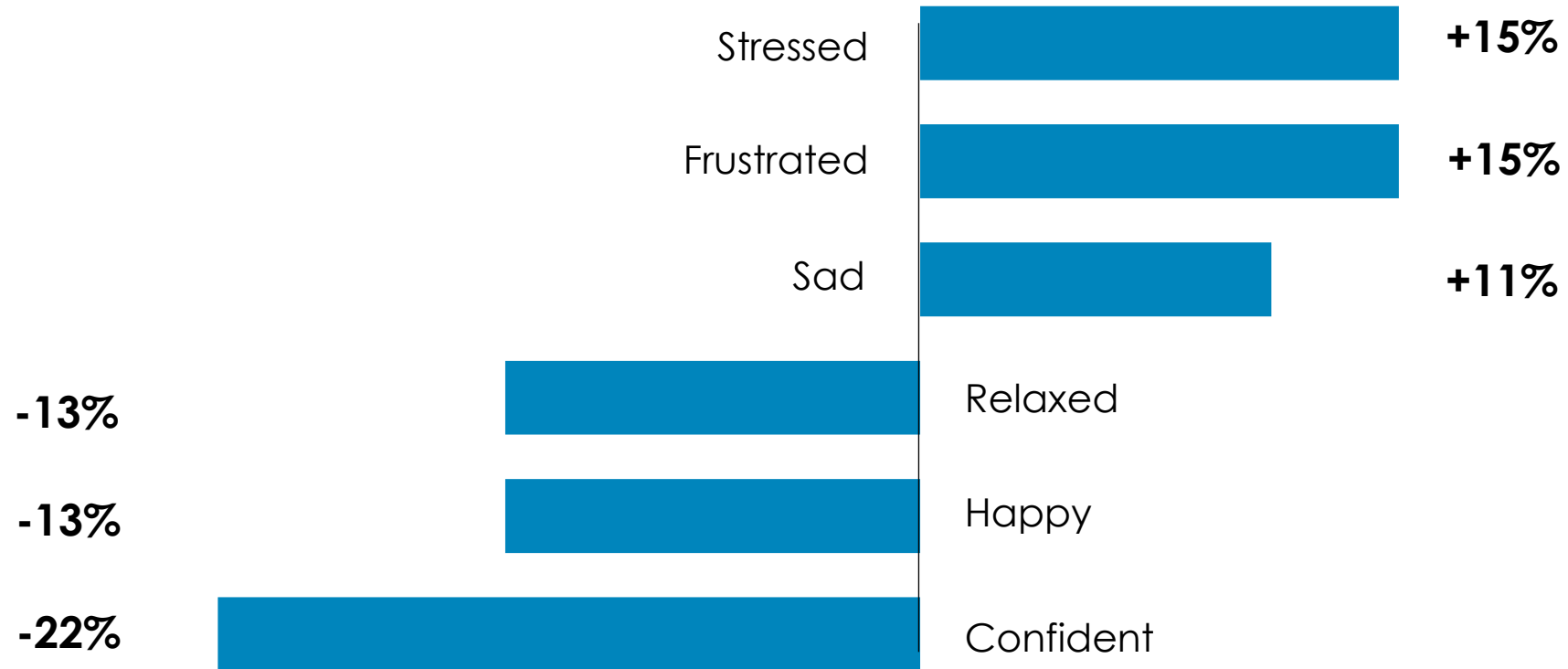
15-24's

Percentage change from 2015-24



15-24's

Happiness metrics for this cohort are all headed in the wrong direction



■ % change from 2015–24 in average (mean) hours for 15-24's registering the emotion

FOCALDATA AI qual linked to TouchPoints

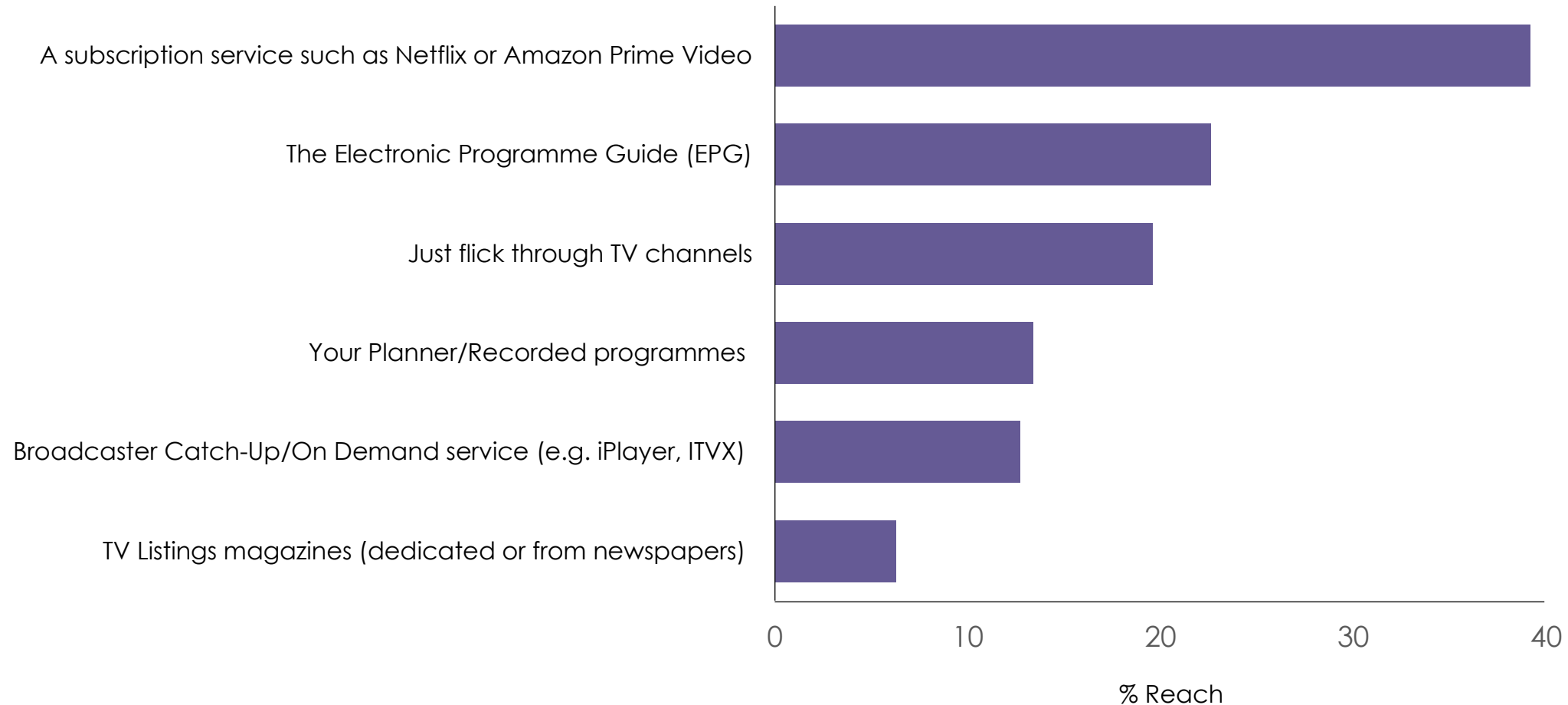


How do you decide
what to watch on TV?



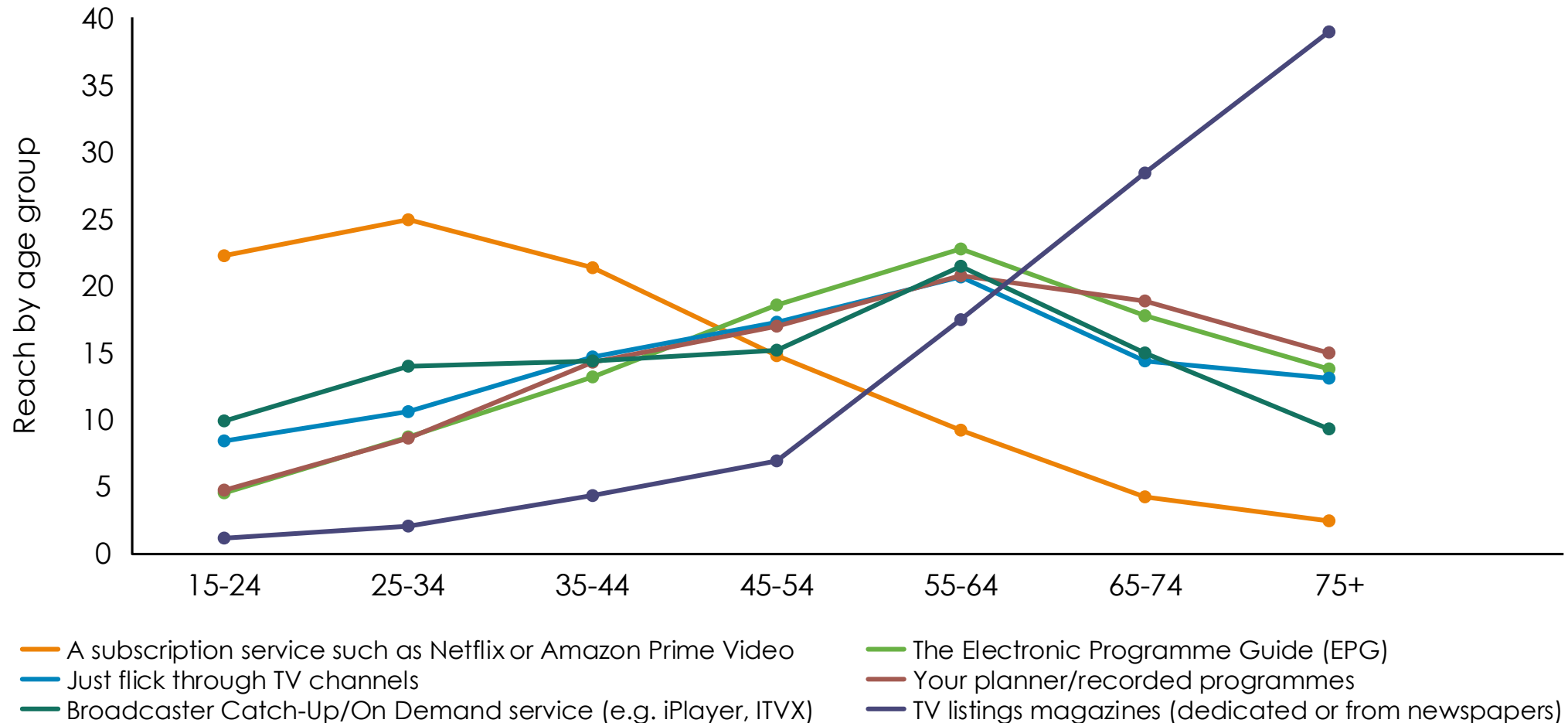
...discuss

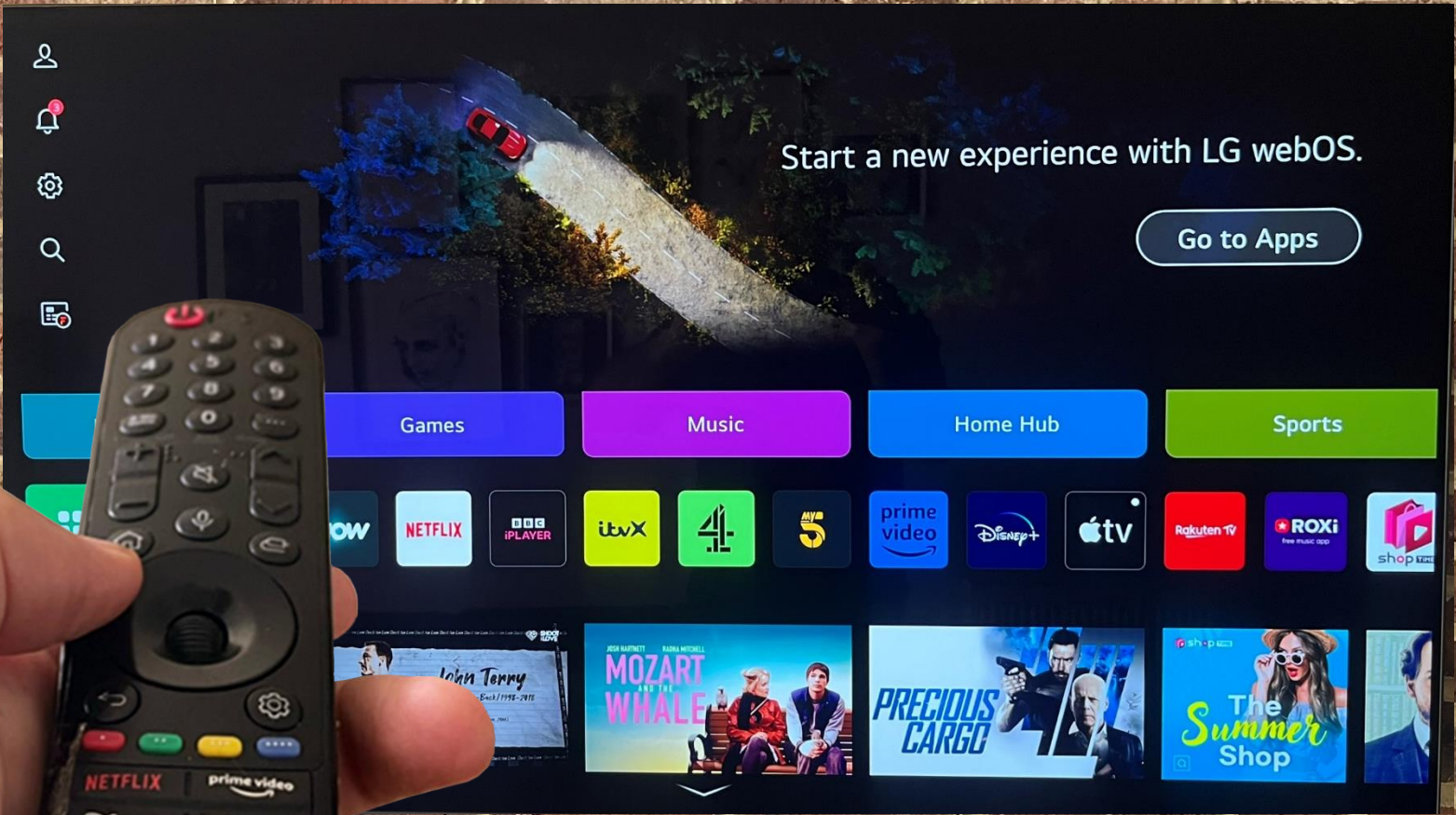
When you do not have a specific programme you want to watch, what do you use or do most often?



TV Listings magazine are the number one choice for 75+

When you do not have a specific programme you want to watch, what do you use or do most often?







FOCALDATA AI qual linked to TouchPoints





FOCALDATA AI qual linked to TouchPoints

S Sage AI 14:14

Moving on to the next research question: Typically, how easy do you find it to decide what to watch?

Participant #1 14:15

I generally know what will appeal to me and my friend. I sometimes browse through the channels or look up the guide. We also subscribe to a couple of streaming platforms.

S Sage AI 14:15

Interesting. Could you tell me more about how you use the guide or browse through channels to decide what to watch? What are you looking for when you do this?

Participant #1 14:17

For Bbc viewing i check their site for the guide. I sometimes use the epg or just browse the channels or platforms. I dont purchase a physical tv guide.

S Sage AI 14:17

I see. When you're browsing these guides or channels, what kind of shows or content are you typically drawn to? Are there certain genres or themes that catch your attention?

Participant #1 14:21

True crime like 24 hours in police custody, Soap Operas including Corrie and Emmerdale, documentaries including Ben Fogle, David Attenborough and Michael Palin, Ongoing drama

S Sage AI 14:21

It sounds like you have a diverse range of interests when it comes to TV shows. How do you feel when you're deciding what to watch? Is it an enjoyable process for you, or do you find it frustrating at times?

Participant #1 14:24

I generally find it quite easy to find what i want, it is frustrating that the bbc is not included on the epg. The problem with so much choice means it takes longer to decide.

S Sage AI 14:24

I see. So, the abundance of choice can sometimes make the decision-making process longer. How do you usually resolve this? Do you have a go-to show or genre when you're unsure of what to watch?

Participant #1 14:25

Outside of the standard viewing, with some programmes it is just a case of giving it a try and see if it interests us. Sadly there is a lot of rubbish available now and not enough worthwhile viewing.

S Sage AI 14:26

Let's move on to the next research question: Thinking back to a recent TV show you watched or are currently watching, can you walk through how you ended up deciding to watch this show?



Explore results summary

☰ Sources



We analysed 34 interviews and found 34 that were relevant to your question.

🔗 AI Assistant

The interviews revealed that respondents typically watch **TV either alone or with close family members**, such as partners or children. For instance, Tracy often watches TV with her husband, who usually makes the viewing choices, while Helen watches TV alone in the evenings due to her children's separate viewing habits.

Several factors influence the decision-making process for what to watch. These include **mood, time of day, recommendations, and the availability of new episodes or series**. One respondent noted, "What I watch depends on my mood and tiredness," while another mentioned, "I decide by which one sticks in my mind the most and piques my curiosity the fastest."

Additionally, **recommendations from friends, family, or online sources** play a significant role in influencing choices. Many respondents rely on recommendations to discover new shows, while others prefer to browse through **TV guides or streaming platforms** to find something that catches their interest. The **influence of social media and online platforms in discovering new shows** was also highlighted by several respondents. These platforms play a crucial role in shaping viewing choices.

Another significant theme is the challenge of having **too many options, which can make the decision-making process overwhelming for some respondents**. This often leads to **frustration** and a desire for simpler ways to choose what to watch

🔍 Ask a follow up question

Ask AI

>> ↑ ↓ Sources > Participant #4

Participant #4 23:48

We very rarely have disagreements about what to watch if my husband wants to watch something different to me i will watch what i want to watch later on catch up

Sage AI 23:48

That's a good way to handle it. Now, typically, how easy do you find it to decide what to watch?

Participant #4 23:52

We sometimes look how many stars have been awarded also we read up on what is written about them and sometimes our friends or family recommend things they are watching or what they have already seen we often catch up with these on iPlayer

Sage AI 23:52

It sounds like you have a system in place. Do you find this process of deciding what to watch enjoyable or does it sometimes feel frustrating?

Participant #4 23:57

Yes its usually ok as we tend to watch 2nd or 3rd series or we go for actors that we like to watch, sometimes it is frustrating when we can't find what we are looking for on iplayer or catch up



Explore results summary

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🔍 Where do you get recommendations from if you can't decide what to watch?

Ask AI

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AI Assistant


Respondents get recommendations from a variety of sources when they can't decide what to watch. One common source is **personal recommendations from friends and family**. For example, one respondent mentioned, "Certain close friends and family, who I know like a lot of the same things as us" (Jack). Another respondent said, "We both have similar taste and it was a genre I was into" (Damian).

Another popular source of recommendations is **online platforms and social media**. Respondents mentioned using platforms like **YouTube, Facebook, and Instagram** to find new shows. For instance, one respondent said, "Youtube, facebook, instagram, word of mouth" (Jack). Another respondent mentioned, "I look at google or facebook for recommendations" (Sharon).


Streaming services and **their built-in recommendation systems** also play a significant role. Respondents often rely on these platforms to suggest new content based on their viewing history. For example, one respondent noted, "The streaming networks know what you've previously watched and tend to make reasonable suggestions" (Stuart). Another respondent mentioned, "**I like the way Netflix gives you top 10 watches**" (Nicola). Review websites are another important source. A respondent noted, "I often don't watch a film if it had a terrible IMDb rating," and another mentioned, "I trust the star ratings on Google."

 Where do you get recommendations from if you can't decide what to watch?


Ask Ai

 Participant #2 15:20


I have a note on my phone with a list. The is comprised from word of mouth, online ads, recomendations on apps etc.

 Participant #2 14:58


I feel there can be biased reviews, especially due to stan culture or you don't know if there are background influences

 Participant #8 12:39


I'm on a NETflix recommendations group on Facebook

 Participant #3 10:06

It was a true crime tiktoker and she tecommended it on a live and everyone was talking avout it!

 Participant #4 14:39

People discussing the sopranos on a podcast

 Participant #3 15:39

It's more that I follow actors I like and they post trailers for their projects. Sometimes i do watch random trailer ads on social media as well



Explore results summary

>> ↑ ↓ Sources > Participant #4

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🔍 Do people take longer deciding what to watch than they used to?

Ask AI

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AI Assistant

Many respondents indicated that they do spend a considerable amount of time browsing shows before deciding what to watch and that it has **become more time-consuming compared to the past**. This is primarily due to the increased number of choices available through various streaming platforms and channels.

Several respondents mentioned that the **sheer volume of options** available on various streaming services contributes to the lengthy browsing time and the **frustration** associated with this process is evident, as some respondents noted that it can **detract from their overall viewing experience**.

The abundance of content and the need to sift through numerous options can make the decision-making process longer. Respondents mentioned that they **often browse through multiple channels, streaming platforms, and recommendations before making a choice**.

Additionally, **the reliance on recommendations, trailers, and reviews has added steps to the decision-making process**. Many respondents mentioned using these tools to help them decide, which can extend the time it takes to make a final decision.

Overall, the increased variety of content and the additional steps involved in the decision-making process suggest that people do take longer to decide what to watch than they used to.

Do people take longer deciding what to watch than they used to?

Ask AI

>> ↑ ↓ Sources > Participant #1

Participant #1 06:57

i can on occasion find it frustrating particularly when there is no new season of programmes that im currently watching

S Sage AI 06:57

I can understand that. Could you share more about the feelings and emotions you experience when you find it frustrating to decide what to watch?

Participant #1 07:02

I suppose it is just the feeling of frustration that i am spending so much time looking for something to watch when i could be watching. It ar times feels like I've exhausted every option & theres nothing left for me to watch

S Sage AI 07:02

I see, that can indeed be frustrating. Now, thinking back to a recent TV show you watched or are watching, can you walk through how you ended up deciding to watch this show?

Participant #1 07:03

scrolling on netflix, seen it had a new season added & thought i might aswell give it a try as its similar to other programmes i like

S Sage AI 07:03



Explore results summary

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What do you do when you've been looking ages and can't find anything?

Ask AI

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Explore results summary

☰ Sources



We analysed 34 interviews and found 34 that were relevant to your question.

AI Assistant

When respondents have been searching for what to watch for ages and can't find anything to watch they resort to a few different strategies. One frequent response is to **settle for something familiar** that they know they will enjoy even if it's not their first choice. For example, Zoe mentioned that she ends up watching her **go-to genres or shows like 'Friends'** when she can't find anything new that suits her mood.

Another common action is **to switch to a different activity**. Tamara mentioned that they might "select but maybe don't focus as much and maybe use her **phone or read** so less concentration to the TV making it almost **white noise**."

Another strategy is simply to turn off the TV. Penny mentioned that if she and her partner don't find anything of interest, **they usually turn off the TV**. This indicates that the decision-making process can sometimes be so frustrating that they prefer to do something else entirely.

Additionally, a few respondents mentioned that they rely on recommendations or trailers to help them decide, but if nothing appeals to them, they might settle for something less engaging or use the TV as background noise.

What do you do when you've been looking ages and can't find anything?

Ask Ai

>> ↑ ↓ Sources > Participant #4

Participant #4 14:28

Frustrated! There's too much choice and a lot of genres dont suit me but come up as options.

Sage AI 14:28

I can understand how that could be overwhelming. When you're in this situation, what do you usually do? Do you have a go-to genre or show, or do you try something new?

Participant #4 14:28

I end up watching go-to genres or shows. Friends for example ia always easy to watch.

Sage AI 14:28

Friends is indeed a classic! When you're not sure what to watch, do you ever ask for recommendations from friends or family, or do you rely on the TV's recommendations?

Participant #4 14:29

Sometimes rely on tv recommendations although if it says horror for example id avoid it. Rarely ask for recommendations

Please select an audience

All Adults (15+)	Men (15+)	Women (15+)	Main Shoppers (15+)
Adults (15-24)	Men (15-34)	Women (15-34)	Main Shoppers (15-34)
Adults (15-34)	Men (35-54)	Women (35-54)	Main Shoppers (35-54)
Adults (35-54)	Men (55+)	Women (55+)	Main Shoppers (55+)
Adults (55+)	Men (ABC1)	Women (ABC1)	Main Shoppers (ABC1)
Adults (ABC1)	Men (C2DE)	Women (C2DE)	Main Shoppers (C2DE)
Adults (C2DE)	BESPOKE AUDIENCE ▲	Main Shoppers with Children	

Back

Next

DayLite – the home of standard charts...

...and open-ended questions on TouchPoints

1. Cost of living crisis

How has the 'cost of living crisis' changed your lifestyle? What are you doing more or less of now or do you expect to in the future? Let us know about any changes to the paid for media services you use, your shopping and working habits, your travel patterns, how often and when you socialise and, more generally, how you spend your free time. Please give as much detail as possible.

2. Sustainability and the environment

We'd like to ask about your views on sustainability, the environment and climate change. Are you now, or planning in the future, to make personal lifestyle changes to help improve the environment? This might involve actively trying to reduce your carbon footprint or actively choosing brands that are better for the environment. Do you see this as all our individual responsibility or do you feel it is up to corporations or the government to take action?

Demographics breakdown for Adults (15-24)



Adults (15-24)- Talking Heads

Audience Population

7,228,000



Average age

19

Gender  



Reach Index



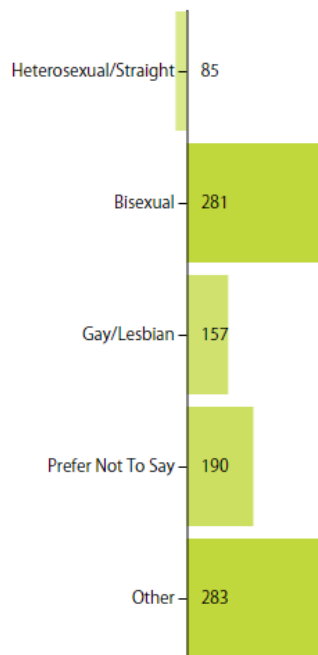
Social grade  

Reach Index



Sexual Orientation  

Reach Index



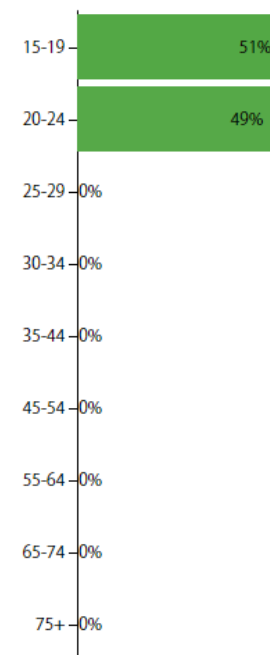
Region  



Reach Index



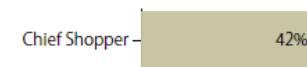
Age  

Reach Index



Household composition  

Reach Index



Adults (15-24) Talking Heads



as table



as visual



Q1. What personal lifestyle changes are you making in order to improve the environment?
Q2. How has the 'cost of living crisis' changed your lifestyle

This visualisation only shows the top 100 longest comments. Switch to table view to see all comments for your audience.



Personal lifestyle changes in order to improve the environment

How has the 'cost of living crisis' changed your lifestyle



Adults (15-24) Talking Heads



as table



as visual



Q1. What personal lifestyle changes are you making in order to improve the environment?
Q2. How has the 'cost of living crisis' changed your lifestyle



EXCEL	Search: Netflix
<p>law which mandates it, otherwise I'm quite a creature of habit and need someone to help me to change</p>	<p>quality of food, reduce house temperature/heating. Take kids out of private school, less clubs for kids, more packed lunches for work, reducing number of meals for myself, cancellation of Netflix subscription. Started side hustle and now with main job and side hustle do about 65 hours a week, 7 days a week</p>
<p>yes I plan on getting solar panels to invest in green energy, I am also always looking for ways to reduce waste and plan on growing more of my own food. I see this as mainly the responsibility of individuals but also corporations and governments play an important part.</p>	<p>Have turned the heating on less and been a lot more mindful of energy usage. I used to use Netflix that was paid for by my partners mum but they can no longer afford it and neither can I so do not have that anymore. I buy less food than before and of a lesser quality sometimes even skipping meals to save money. I work from home which saves money on petrol. I didn't socialise much before but do so even less because none of my friends can afford to go out either so we just don't anymore except on rare occasions. I spend most my time at home playing computer games but I did that before so that has not changed.</p>
<p>I feel like although I'm doing what I can by reducing my carbon footprint, being more environmentally conscious with food and choosing sustainable brands - Large corporations and the government MUST take the brunt of the responsibility as they have the power/are causing the majority of issues that the individual has very little power for changing despite their best efforts. Every little helps but not without the overall system changing. Capitalism isn't a sustainable way of living.</p>	<p>I stopped paying for most streaming services and started working full time at a professional job as the bar work I was doing along side being a self employed actor with a chronic illness, wasn't sustainable enough - I only shop at Aldi and only travel to see my family once a month or less - socialising (outside of my housemate and colleagues) has become nearly impossible - My illness makes it so I have to conserve my energy, and I need it all to work full time because I can't afford not to. I spend my free time watching Netflix shows or just lying in bed watching YouTube or</p>

SVOD reaching maturity



I have started to **rotate** streaming subscriptions so that I do not have to pay for more than one subscription at a time.



I no longer subscribe to streaming services and watch YouTube and catch up Television instead.



I will be reviewing subscriptions such as Amazon Prime after the announcement that they are going to charge members an extra fee per month to watch their streaming service without being subjected to advertising.



I have **cut down** on the streaming services I use and watch very little TV apart from sport. Have given up Disney+ and Netflix in the past year.



Have stopped 1 streaming service (DAZN) and **reduced** my Sky bill by over 50 percent.



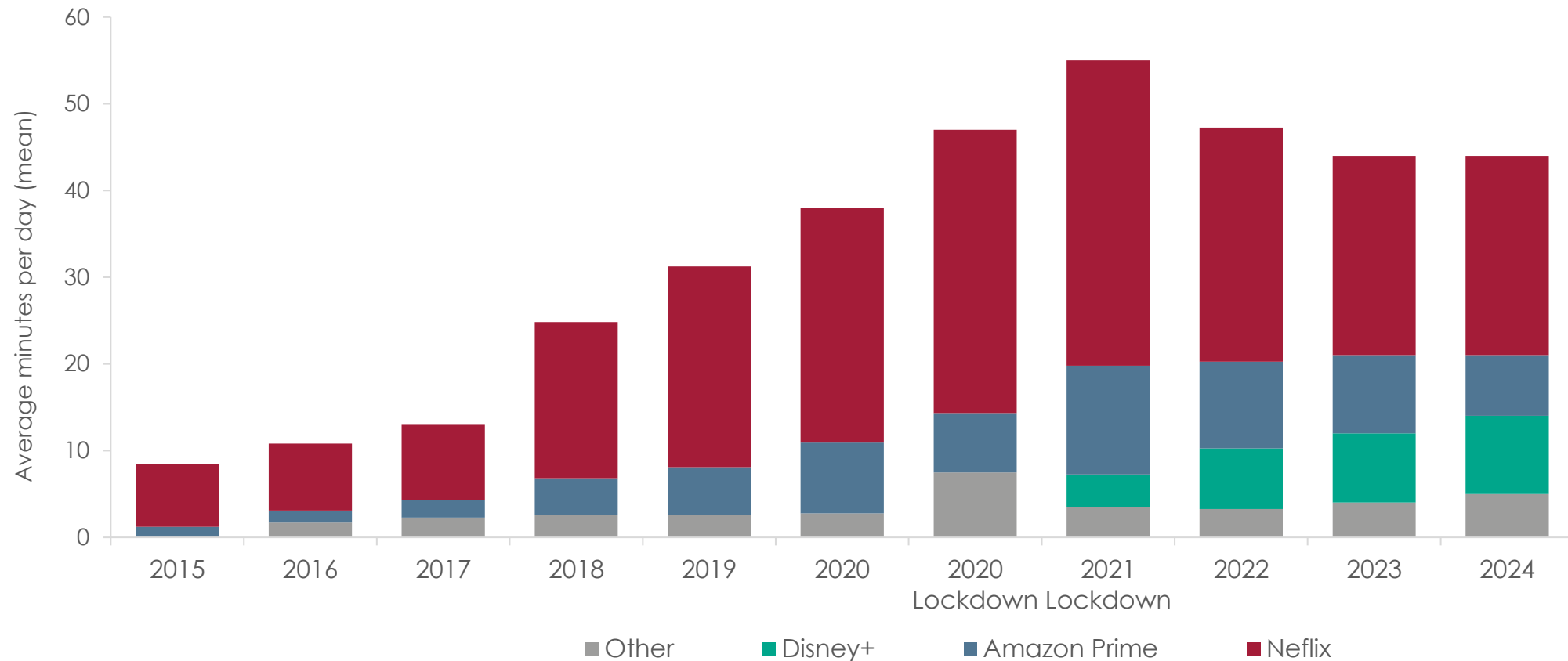
Media providers have become increasingly too expensive and illegal streaming services are more attractive.



Source: IPA TouchPoints 2024 mean hours per day for SVOD. Share of minutes per provider in stacked column

SVOD reaching maturity

SVOD minutes per day (mean) with share by SVOD Service



Source: IPA TouchPoints 2024 mean hours per day for SVOD. Share of minutes per provider in stacked column



TouchPoints Launch

2024

