Incorporated by Royal Charter

Making sense

The commercial media landscape

Second Edition with analysis from Les Binet

Contents

Since we last met

Simon Frazier, Senior Research and Marketing Manager - IPA

Since the launch of the first edition of *Making Sense* back in September 2019, we have seen the release of the latest TouchPoints data and worked with the industry in order to create an accurate representation of Out of Home media time within TouchPoints.

For the second edition, we also wanted to understand the level of impact that the growth of subscription media services is having on the overall ability of commercial media to reach audiences. While we often hear that X or Y subscription platform is now the only media of interest to 16-34s, the reality is actually quite different. Despite the apparent meteoric rise of Netflix to 37% weekly reach of All Adults, the split between commercial and non-commercial curated media share of time has only changed by one percentage point since 2015 while the average time spent with all curated media per day has remained exactly the same at 8 hours and 27 minutes.

TouchPoints provides an unbiased and consistent view of how our media consumption is changing over time. The survey is media neutral and provides context for all media consumption. Throughout this report we have taken care to ensure that data is presented in a media-neutral way.

Figures for average hours spent with media are based on per capita calculations, rather than just the users of each media, so that everything is compared on the same basis. Keys within charts are listed alphabetically to ensure consistency of reporting. In line with the requests of our member agencies, we have looked at all media, including Out of Home and Mail, and Curated Media which is content driven. This gives a full portrait of the changes in media behaviours, and fits with agency planning norms. We hope that you will find the report a valuable starting point for any media-planning decisions you are making.

Pete Buckley, Connection Planner, Northern Europe - Facebook

Facebook are proud to continue to partner with IPA in publishing *Making Sense*. This second edition of the report builds on the first by bringing further clarity to an increasingly complex commercial media landscape. Uniquely, the report uses a single-source dataset to analyse reach and time spent for commercial media specifically. This is important for two reasons. Firstly, it means different media channels can be accurately compared for scale. Secondly, the focus on reach and time spent, means the findings are strongly linked to effectiveness. These two media metrics have the strongest correlation with driving large business results, as evidenced by Les Binet and Peter Field in their IPA publication *Media in Focus*.

Of course, these metrics are not the be all and end all. Investment ultimately needs to align with incremental brand and business outcomes rather than proxy measures. At Facebook we encourage advertisers to run experiments using a test-and-control methodology to determine how to maximise outcomes. As the commercial media landscape continues to evolve, this experimental mind-set and a stronger focus on outcomes is becoming ever more required.

As Les Binet highlights in his analysis, "...one day all media will be digital". Whilst that day may still be some time off, it's clearly coming. The report shows that for the first time 50% of commercial media time is now spent with digital channels, whilst for 16-34s, digital now commands 73% of time. These shifts mean it's becoming increasingly important for the industry to grow its digital brand-building muscle, since focusing on these channels as short-term response drivers alone may result in brands missing out on the biggest opportunity of our generation.

In a nutshell

This report predominantly utilises data from IPA TouchPoints 2019 to help planners and advertisers to better understand the commercial media landscape. The report is broken down into three sections. First the report lays out the broad media landscape today. Then, in section two, we focus on understanding how the GB adult population spend their media day. Finally, in section three, we start to look at the differences between age groups.

As this report is aimed primarily at agency planners and advertisers, we have broken down the definitions of media channels to reflect the way they are often planned and traded. Definitions are available in the appendices. Throughout the report we have compared 2019 to 2015 data to give an understanding of how commercial media consumption is evolving.[1,3,4] In the report you will see data presented as: scatter graphs looking at the audience reach % and mean hours per day of usage; pie charts looking at the % share of total commercial media-time for each channel by audience; line graphs looking at key media (3%+ share of all media time[4]) reach across the day; and bar graphs looking at the weekly audience reach % by channel.

The analysis shows that across just five years the curated commercial media landscape has been redefined by the rapid growth of smartphone usage and subscription-based media. However, the shifts are not universal; the commercial media landscape is becoming increasingly fragmented and diverse.

We hope this report will help to guide readers through this complexity and we have summarised the five key take-aways below:

1. The media landscape has evolved significantly between 2005 and 2019, and a greater focus than ever will be needed on diverse media plans to maximise overall campaign performance.

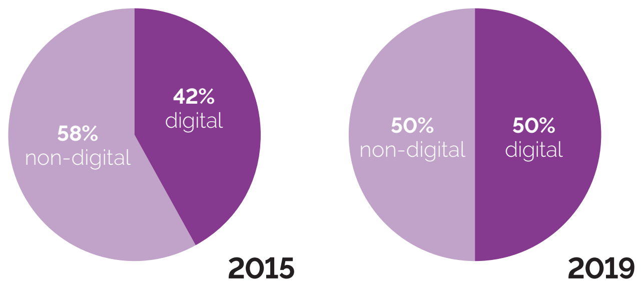
2. Increasingly media planners are facing challenges when building broad-audience, high-reach campaigns, due to the fact that in just four years the gap between where 16-34s and 55+ spend their curated commercial media time has considerably widened.

3. For All adults, two media channels (Commercial TV and OOH) command the highest reach and time spent, with one-to-one media channels of functional internet and social media following just behind. This illustrates the clear benefit of utilising a variety of media platforms to optimise campaign delivery.

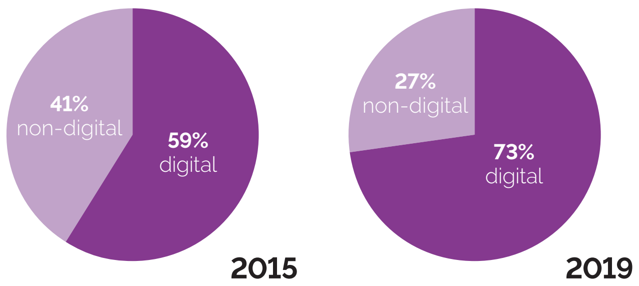
4. OOH and Social Media are the two dominating channels for 16-34's and both share the similarity of being largely place-based media channels, with social media often consumed on mobile. This demonstrates the benefit of testing media strategies rooted in place, as well as time-based channels.

5. For commercial media, time is now being spent with digital rather than non-digital channels.[2] For All Adults the split has grown from 58:42 towards non-digital in 2015 to 50:50 today. For 16-34s the split is now 27:73 in favour of digital channels. How to build a brand with these channels is now an essential challenge for advertisers.

All Adults commercial media time share[2]



16–34s commercial media time share[2]

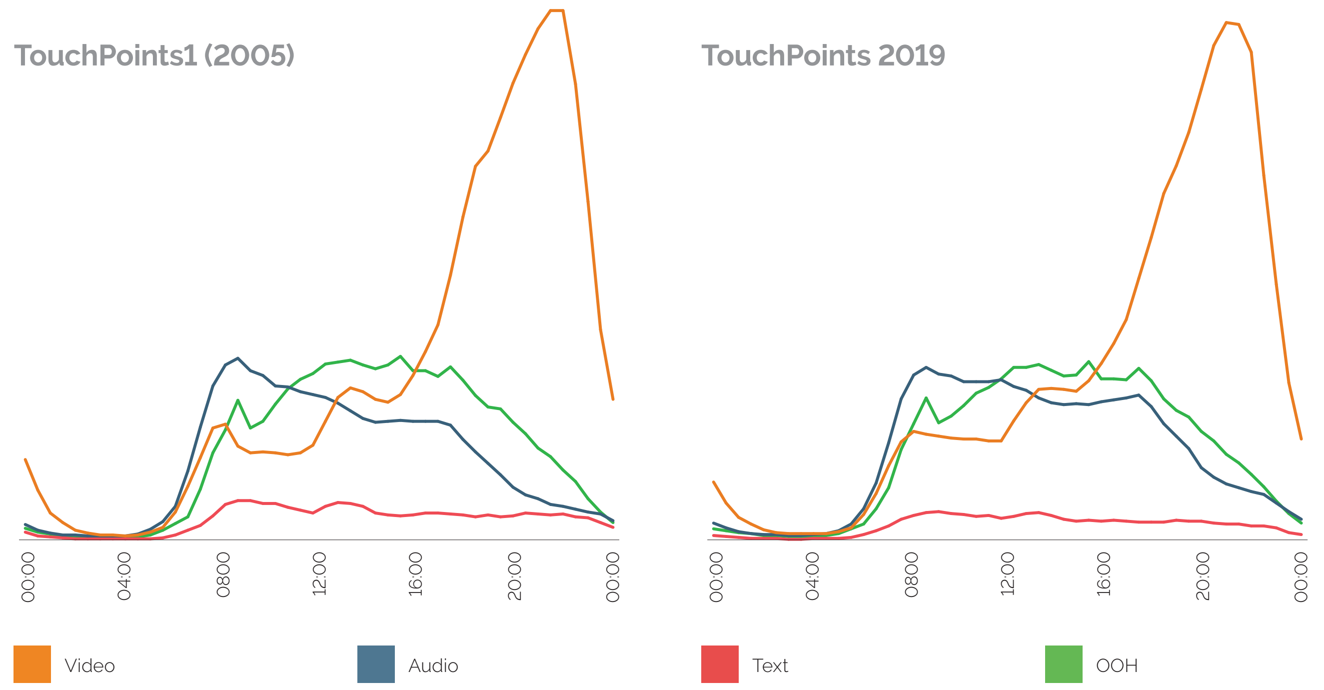


Section 1

The broad commercial media landscape today

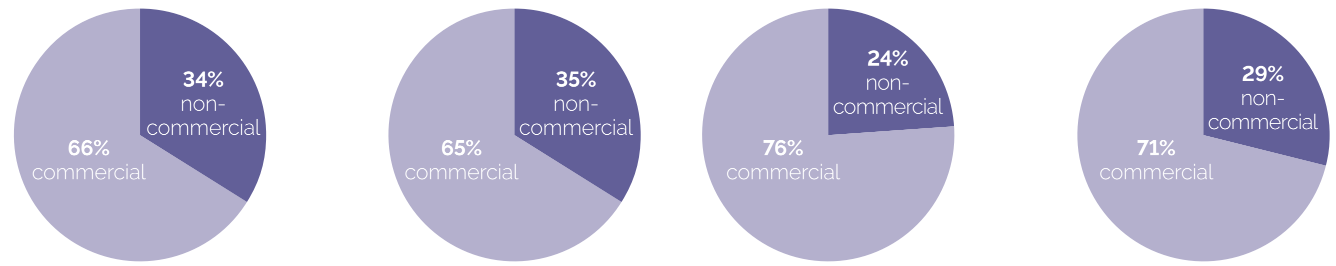
At its very broadest level, the media landscape appears stable when analysing the different media formats GB adults are consuming throughout the day. Compare the shape of a media day in 2005 vs. 2019 and the difference is minimal. People are still watching video in the evening, audio is still peaking in the morning, OOH builds as the day progresses and tails off towards the evening, and reading text is at a comparatively lower but consistent level throughout the day.

The patterns of media consumption



Whilst the formats appear stable, the channels on which this content is being consumed are changing. This report will lift the lid on how media consumption has shifted over the last four years by analysing time spent, daily usage patterns and weekly reach of each commercial channel across four key audiences (All Adults, 16-34, 35-54 and 55+).

Curated media time share



All Adults 2015
8 hours 27 minutes

All Adults 2019
8 hours 27 minutes

16-34s 2015
8 hours 13 minutes

16-34s 2019
8 hours 29 minutes

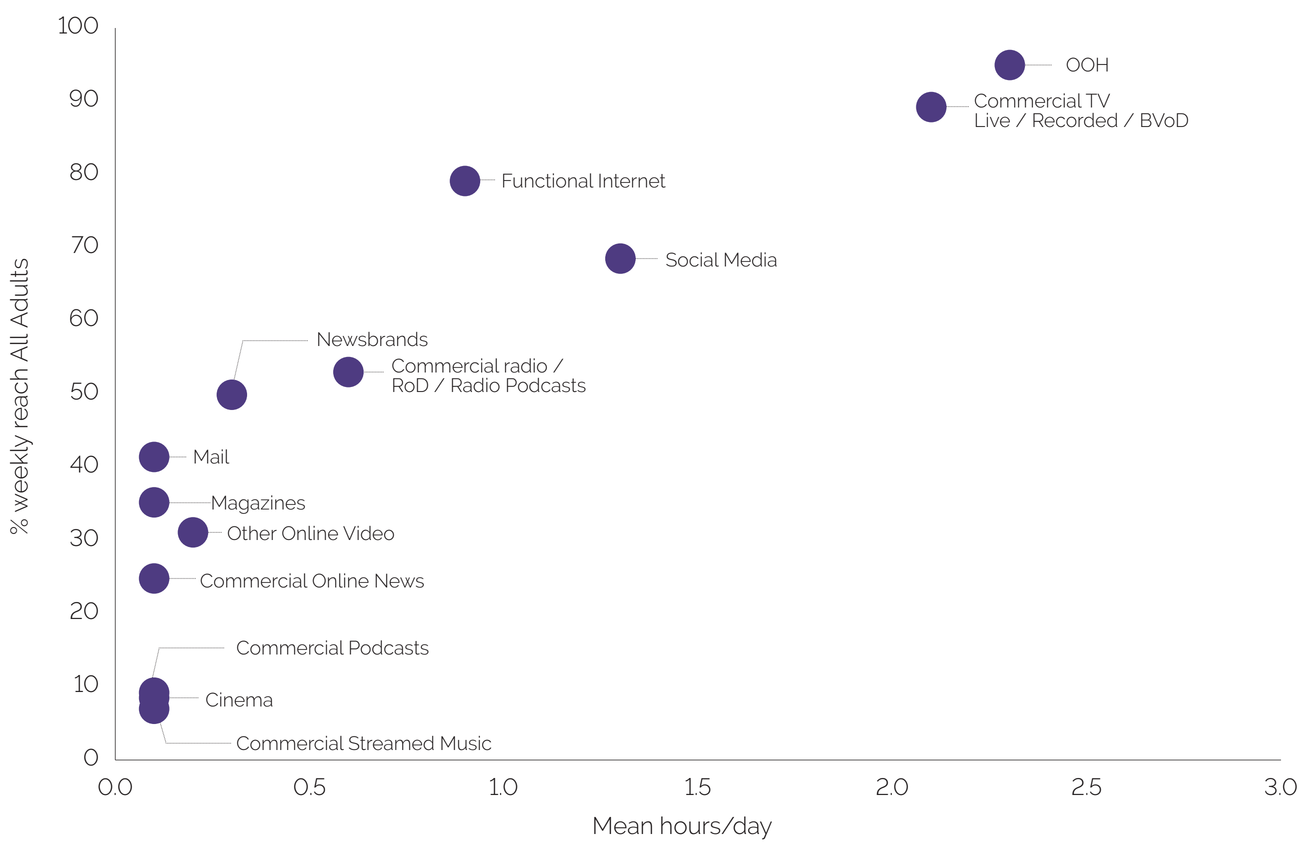
Looking at the charts above we can see that despite the rapid growth of non-commercially funded services such as Netflix being seen as taking commercial media share, the share of commercial curated media has only changed by 1% for All Adults. Interestingly, it is among 16-34s where this share has shifted the most, from 76% commercial in 2015 to 71% in 2019.

While average time spent with media (per capita, per day) remains consistent for All Adults at 8 hours 27 minutes, 16-34s have seen an increase of 16 minutes per day, from 8 hours 13 minutes to 8 hours 29 minutes. This may be explained by some of the increase in non-commercial curated media being incremental rather than simply in replacement.

Source: IPA TouchPoints1, 6, 2019 – Grouped media reach across an average day and share of curated media by commercial and non-commercial split for GB adults.

Before diving into the detail, we start the report with an overarching overview of the current total GB commercial media landscape, from both a weekly reach and average daily time spent perspective. Here we have combined the digital and non-digital properties of each media type.

The commercial media landscape in 2019



Source: IPA TouchPoints 2019 – Weekly reach and mean hours per capita per day of grouped media consumption for GB adults.

Throughout the rest of the report, in order to give a fuller view of how commercial media time is evolving, we have analysed each commercial media channel broken down into its individual parts, breaking out Print from Online for Newsbrands for example, since this is how the media are traded (we have called these commercial media properties buyable media types). This is crucially important as it allows agency planners to have a more informed view of how the individual elements of the commercial media landscape are evolving.

Section 2

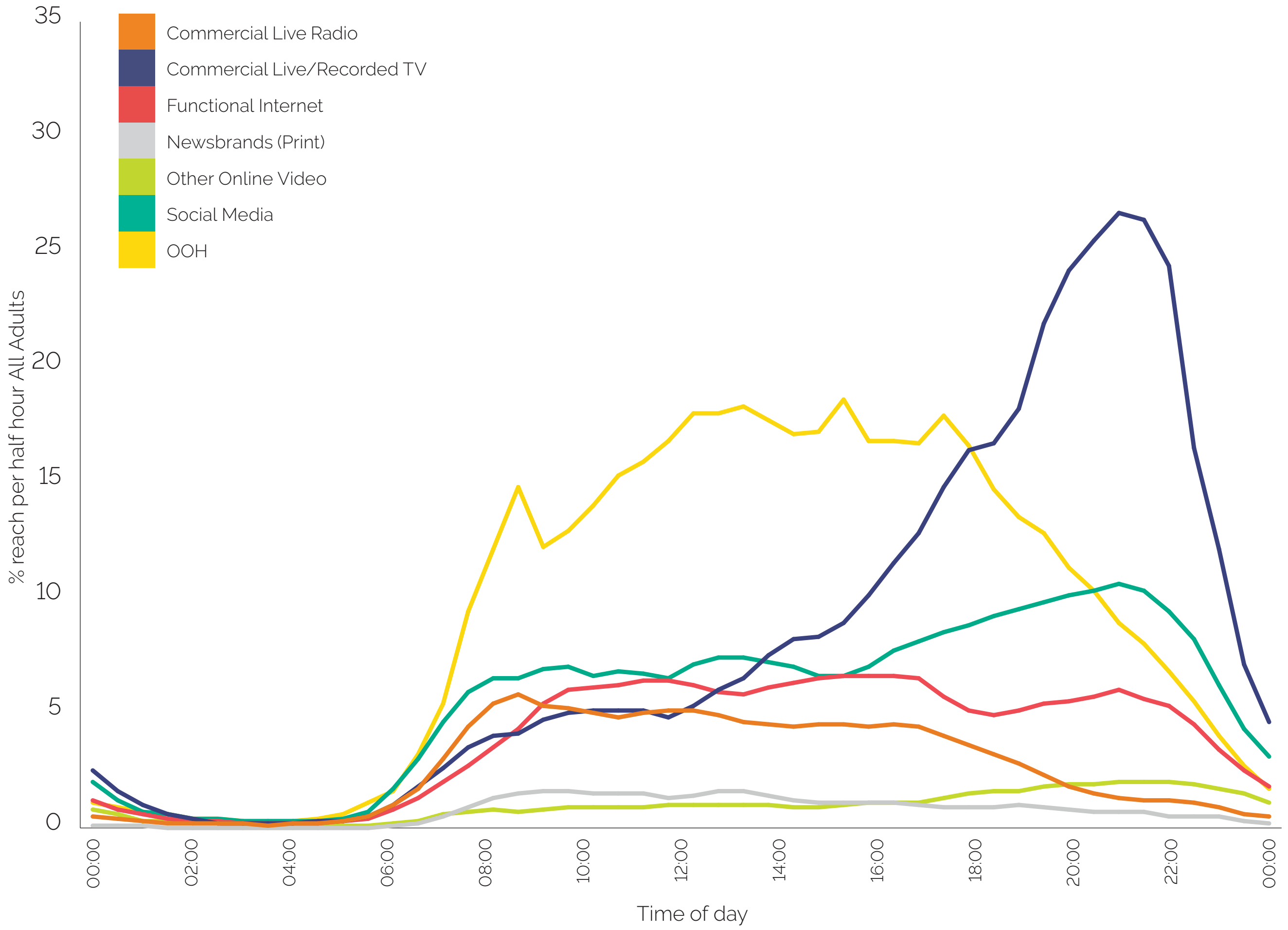
How we spend our media day

All Adults

When looking at the total media landscape, Out of Home is the largest media channel overall in terms of reach and time spent and takes a consistent 28% share of all media time in both 2015 and 2019 and only a 1% decline in overall reach in this time period. Looking at the curated media space, Commercial TV continues to be the largest channel from a reach and time-spent perspective, followed by Social Media and Functional Internet. Commercial TV and Social Media combined take over half of the entire curated media day (57%), a proportion only changing by four percentage points since 2015. What has changed is the mix within that 57%, with Social Media gaining four percentage points (now 23%) whilst Commercial TV has decreased by eight percentage points (now 34%). Interestingly, other channels have seen less change. Commercial Radio has stayed relatively consistent at around an 11% share of curated commercial media time 2019 vs. 2015 and Newsbrands (when Print and Online are combined) also stay consistent at 5% of the media day.

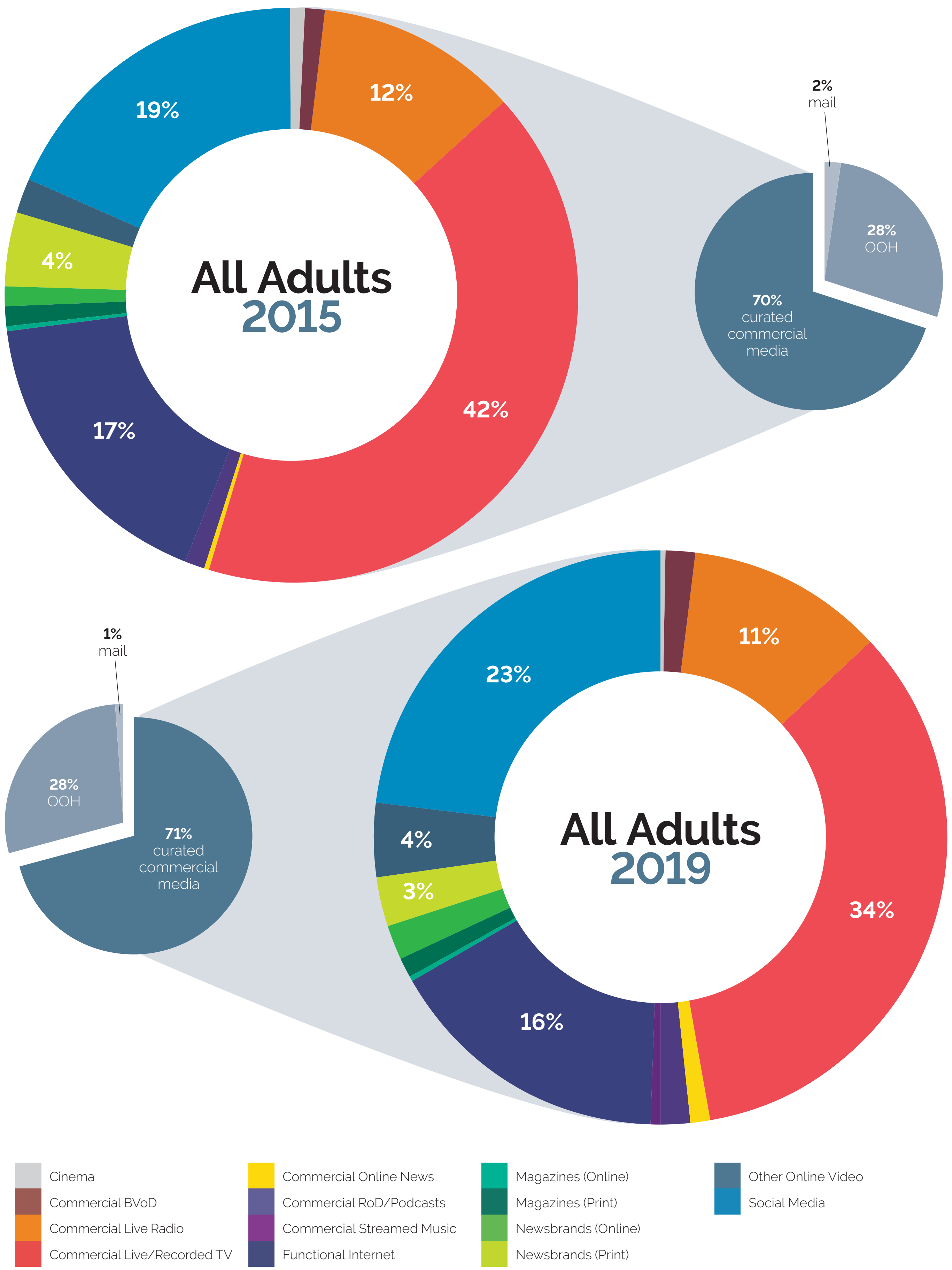
From a weekly reach perspective, online channels have all grown whilst Commercial Radio, Mail, Newsbrands (Print) and Magazines (Print) have seen some decline in reach.[3] This is reflected in how people consume media throughout the day. Social Media is now the largest curated commercial media channel before 13:30, while after this time Commercial TV dominates. OOH builds and remains at a consistent level across the day before being overtaken by Commercial TV at 6pm.

The timeline of commercial media consumption across an average day for media with a +3% share of media time[5]



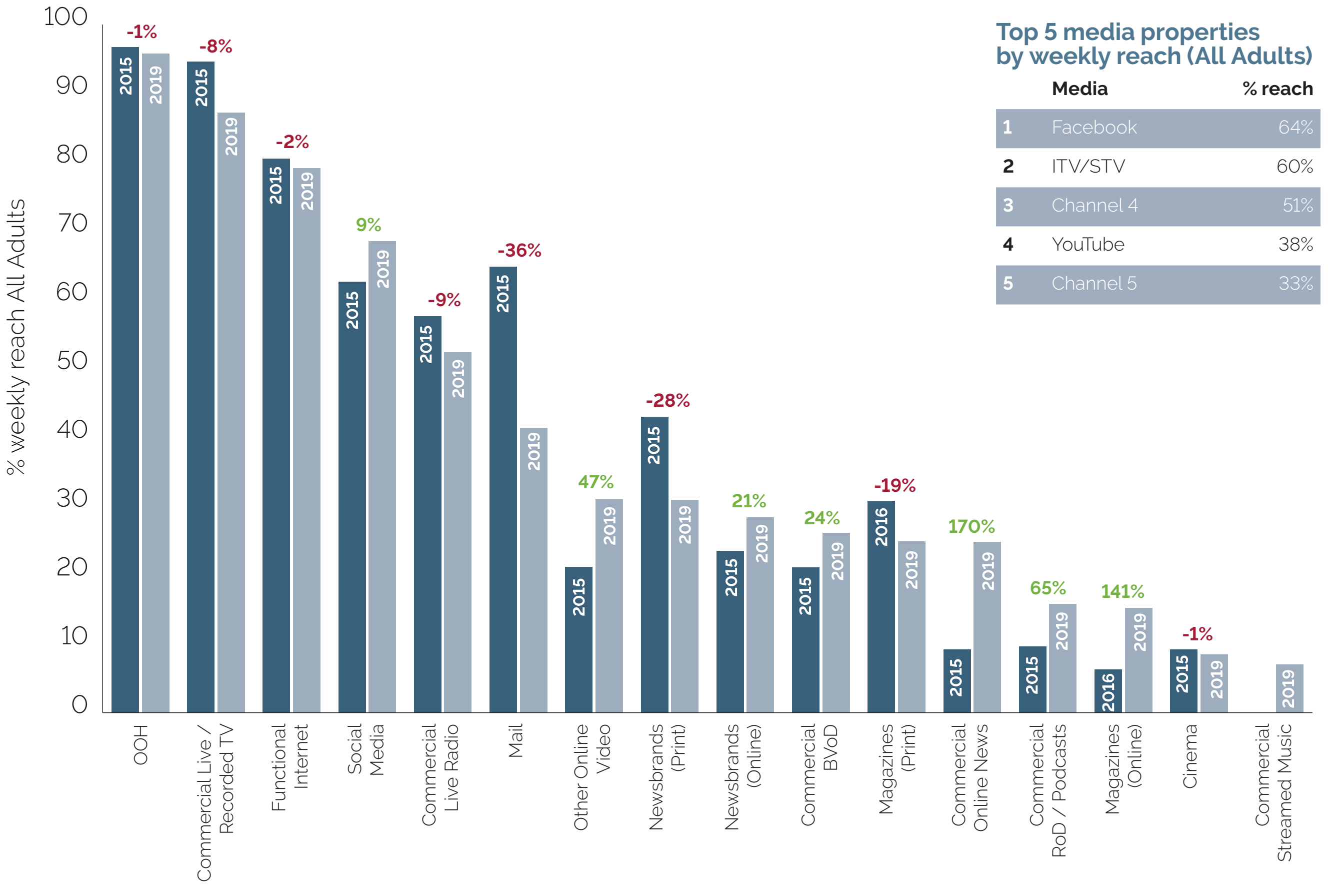
Source: *IPA TouchPoints 2019* – The timeline of commercial media consumption across an average day for media with a +3% share of media time (All Adults)

Share of total commercial media time broken down by buyable media types[3,4,6]



Source: IPA TouchPoints6 and 2019 - Weekly total share of time spent with commercial media for All Adults in GB broken down by media types

The weekly reach of commercial media channels broken down by buyable media types[3,6]

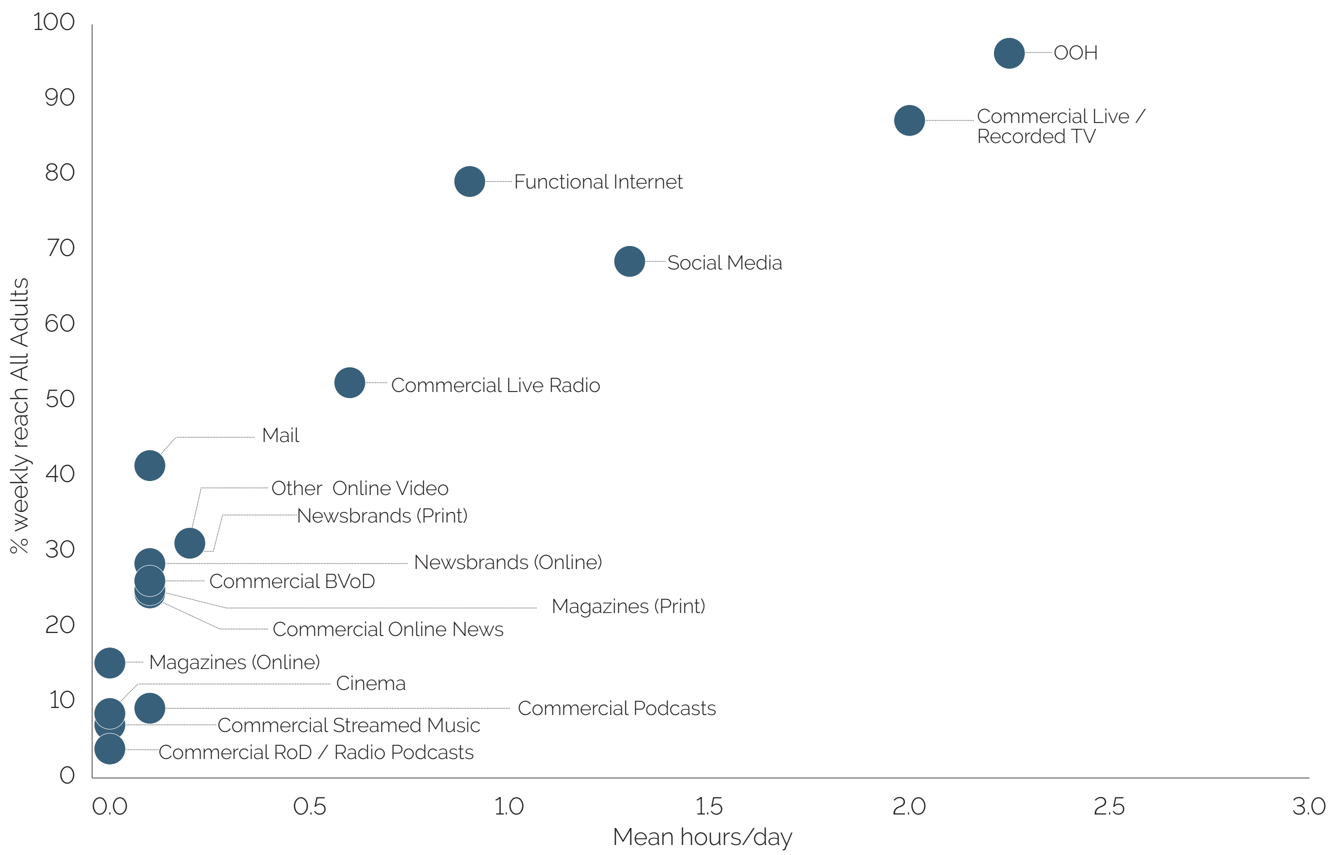


Top 5 media properties by weekly reach (All Adults)

	Media	% reach
1	Facebook	64%
2	ITV/STV	60%
3	Channel 4	51%
4	YouTube	38%
5	Channel 5	33%

Source: IPA TouchPoints6 and 2019 – Weekly reach of buyable media types for All Adults

The commercial media landscape in 2019 broken down by buyable media types



Source: IPA TouchPoints6 and 2019 – Weekly reach and mean hours per capita per day of buyable media types for All Adults

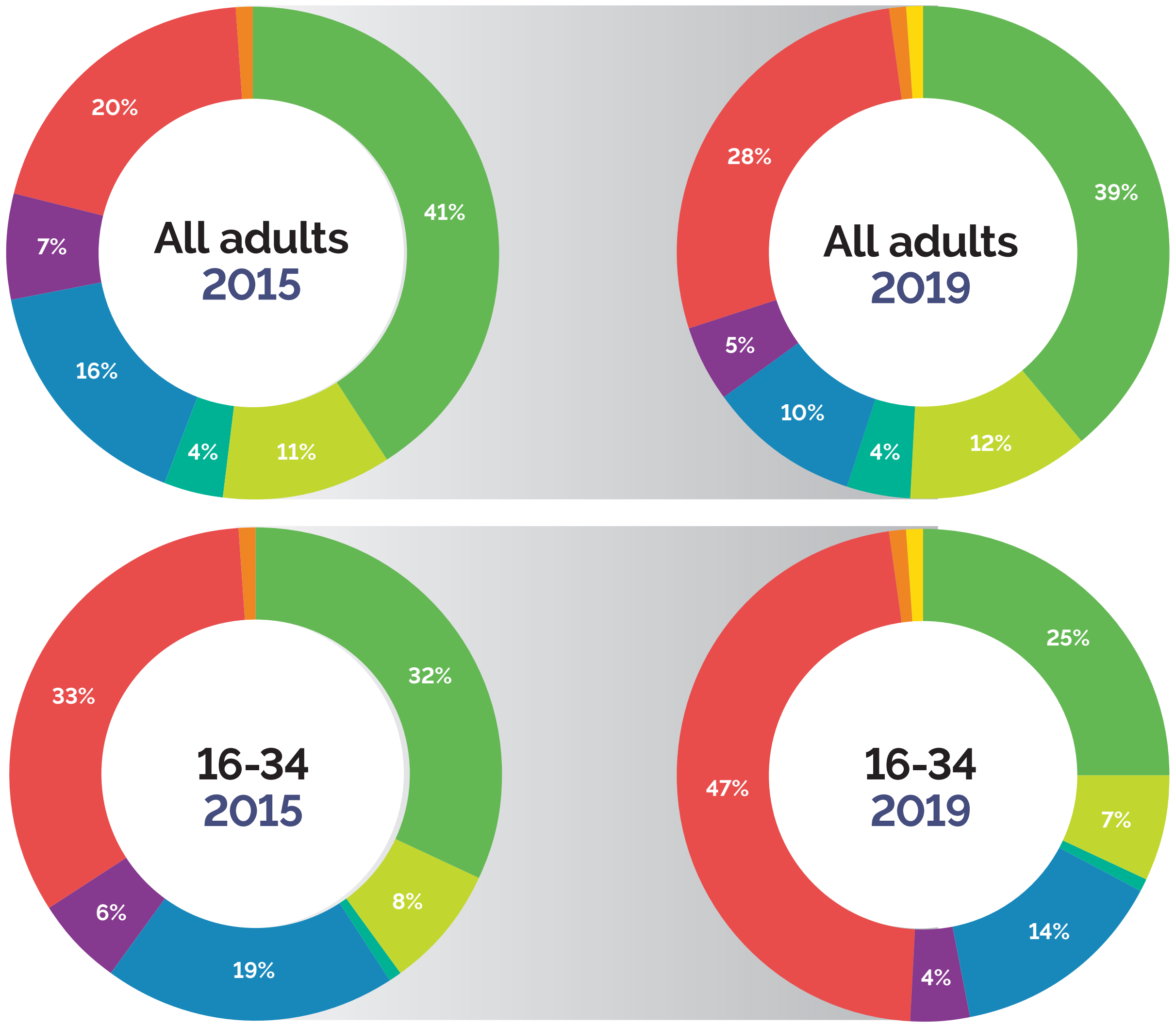
Section 3

Media behaviours diversifying across age groups

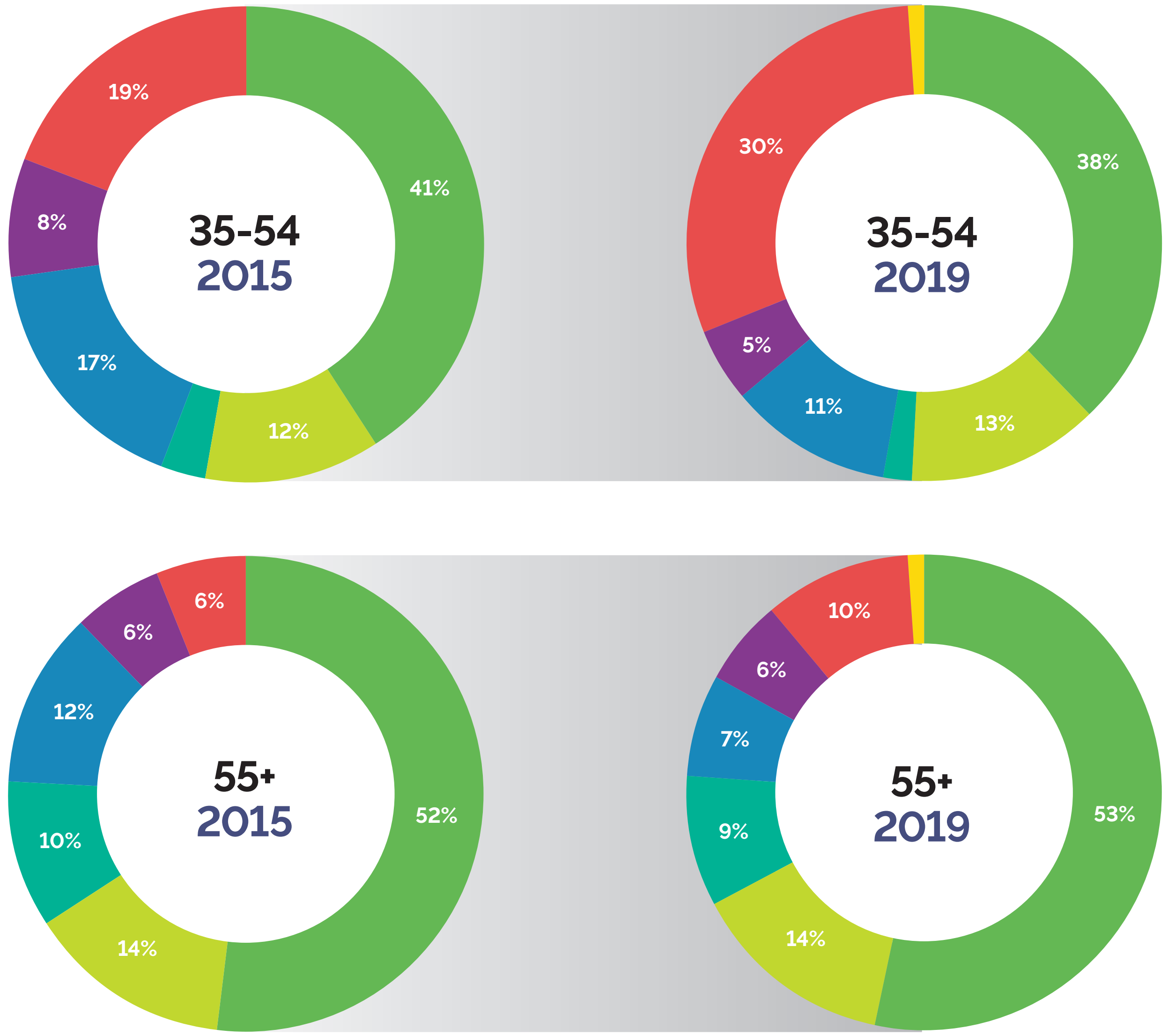
Device usage

Looking at device usage gives an indication of some the drivers of change impacting the commercial media landscape. As would be expected, there has been a significant increase in the amount of time spent on a smartphone for All Adults, with share increasing from 20% in 2015 to 28% in 2019 for All Adults, a 40% increase within five years. Interestingly, other digital devices haven't seen such an increase; time spent on tablets has fallen from 7% in 2015 to 5% in 2019, whilst time spent with PC / Laptop has fallen even further, dropping from 16% in 2015 to 10% in 2019. It seems that the smartphone may have been the driver of these declines; if you combine PC / Laptop, smartphone and tablet, there has been only a slight increase in time spent, moving from 43% in 2015 to 44% in 2019.

The smartphone may also be having an impact on traditionally non-digital channels, with print commanding just 4% of the commercial media day. Yet the TV set is surprisingly robust, seeing only a slight decline from 41% in 2015 to 39% in 2019 for All Adults. Radio has fared even better, growing from 11% to 12%. At the other end of the scale, the data give clear insights into more emerging devices. Whilst Voice has seen an incredible amount of hype recently, the data show these voice-activated devices still only command 1% of device time for commercial media.



Source: IPA TouchPoints 6 and TouchPoints 2019 – Share of curated commercial media consumption by device



Source: IPA TouchPoints 6 and TouchPoints 2019 – Share of curated commercial media consumption by device

As with channel use, there are some significant variations by age group, as may be expected. For 55+ time spent with a TV set has actually increased slightly from 52% in 2015 to 53% in 2019, potentially due to greater choice; with on-demand and catch-up, there is always something on. The smartphone has seen significant growth, but from a much smaller base, growing from 6% to 10% of time spent for 55+, and now commanding more time than print (9%) for the first time.

For 16-34s the shifts have been more considerable. Mobile (smartphone and tablet combined); now represents half of the day (51%), which is double that of the TV set (25%). The scale of this change is significant, Back in 2015, just five years ago, time spent with the TV set and the smartphone was almost equal, both taking a third of the commercial media day. Other emerging devices are not biasing towards younger audiences. Time spent with voice-activated devices, whilst small at 1% for 16-34, is consistent at that level across all age groups, showing a more balanced usage and not one being driven specifically by younger adults

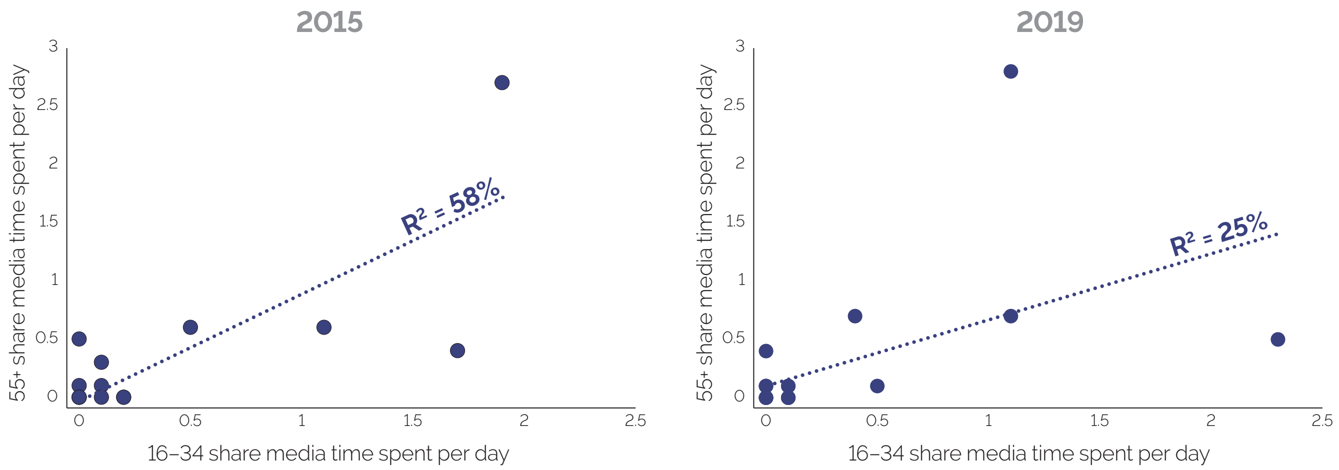
Breaking the GB adult population down by age allows us to understand how commercial media consumption is changing for different groups. Whilst media consumption for adults is changing, the rate of change varies quite markedly by age groups. This means media behaviours are becoming more diverse. The data evidence this shift by showing the correlation between the reach and time spent of curated commercial media by different age groups.

A correlation is the strength of the relationship between different datasets looking at the same variables. A 100% correlation would imply the variables were exactly the same, whilst a 10% correlation implies the variables are 90% different.

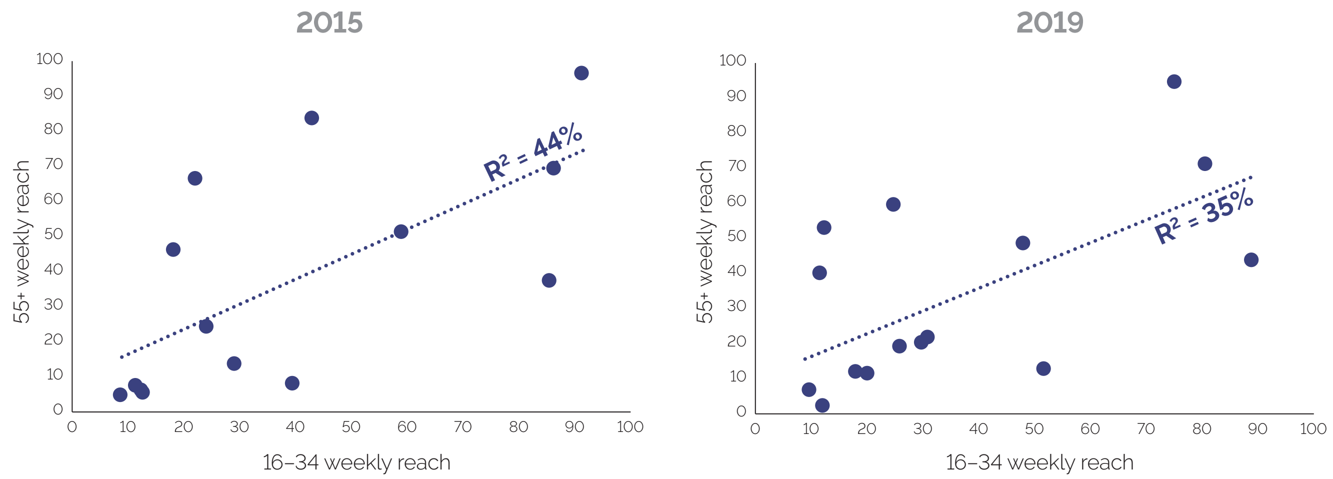
The correlation between the media use of 16-34s and 55+ from a time-spent perspective was 58% in 2015. By 2019, this has fallen by more than half to 25%. Although less marked, a similar story is seen when looking for a correlation in the reach of channels, with the correlation falling from 44% to 35%, further indicating increasingly disparate media behaviours between these age groups.

The media behaviour of 55+ is changing at a considerably slower speed than younger people and therefore habits are becoming more diverse. A 'one size fits all' media approach is likely to be less effective than it was previously. Whilst broad reach is still essential for profitable brand growth (see Les Binet and Peter Field – *Media in Focus*), how advertisers achieve that broad reach is becoming more varied across age groups.

Comparing the correlation of time spent with curated commercial media channels



Comparing the correlation of weekly reach of curated commercial media channels



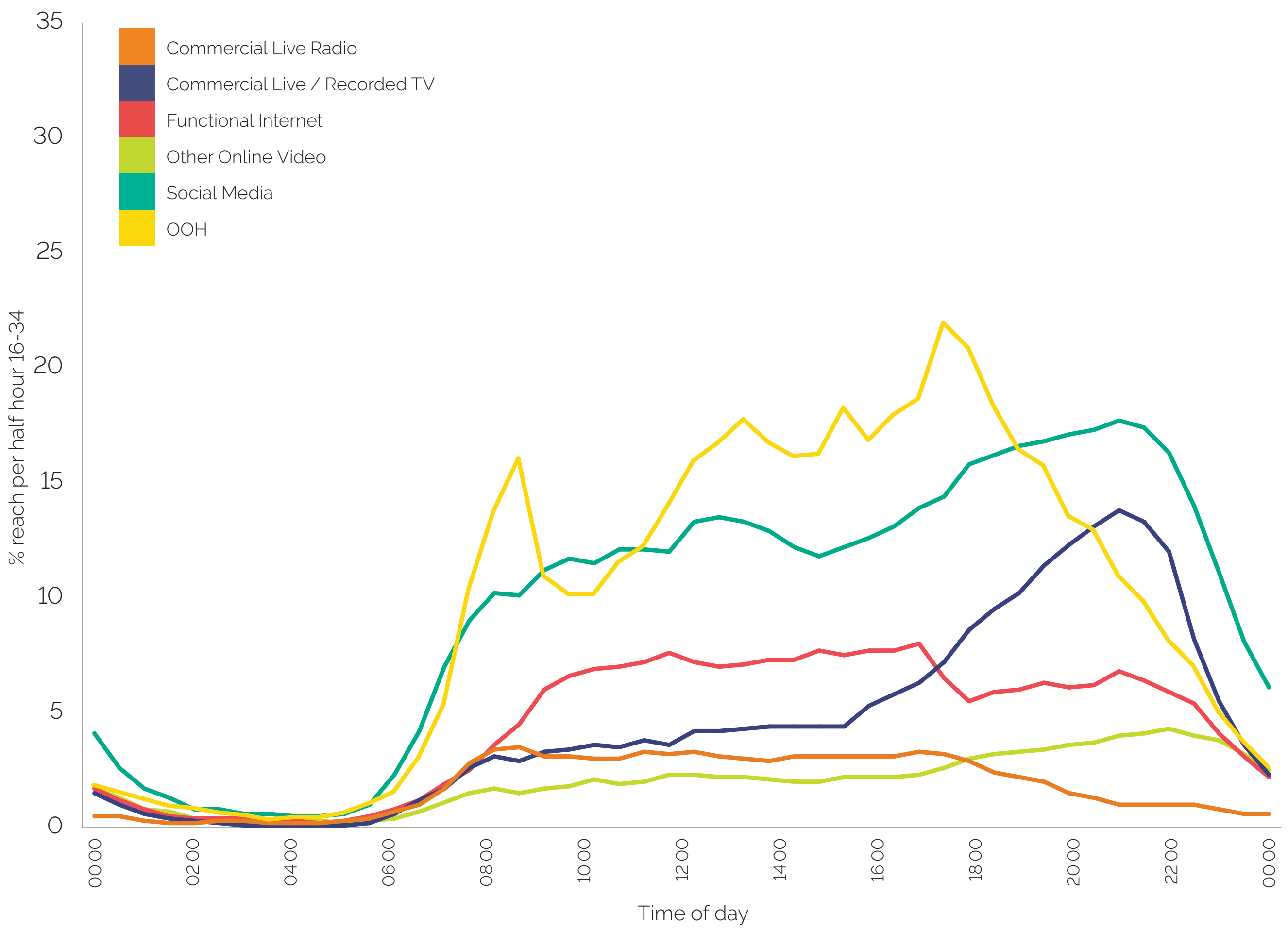
Source: IPA TouchPoints6 and 2019 - Mean hours/day and reach of curated commercial media channels

16–34 Significant shifts

16–34

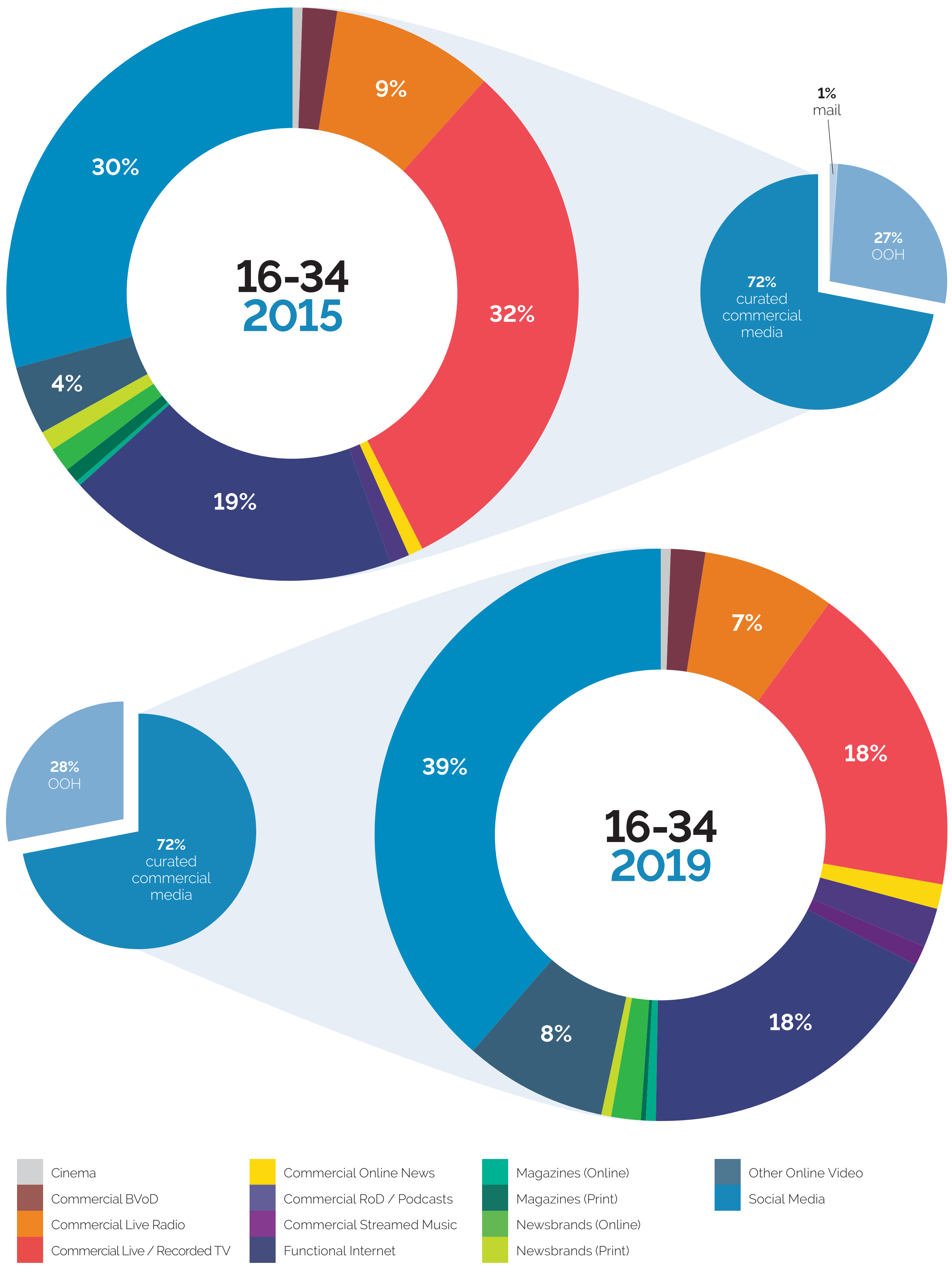
For 16-34s, OOH's reach dominates and builds throughout the day, peaking at 6pm, after which Social Media has the highest reach for this cohort post 7pm. Time spent with Social Media for 16-34s has grown significantly in the past four years. From both a time spent (now 39% of media day) and weekly reach (89%) perspective, Social Media dominates the curated media space. 16-34s spend proportionately twice as much time with Social Media as they do with any other curated commercial media channel. Online Video has also grown significantly for 16-34s with time spent increasing from 4% of curated commercial media time in 2015 to 8% in 2019. From a reach perspective, Magazines (Online) have seen large percentage growth increasing 108% (from 9% in 2016 up to 18% in 2019). For Newsbrands, whilst the reach for Newsbrands (Print) has reduced by 44% this has been largely compensated by the growth in Newsbrands (Online), which grew by 28%.

The timeline of commercial media consumption across an average day for media with a +3% share of media time[5]



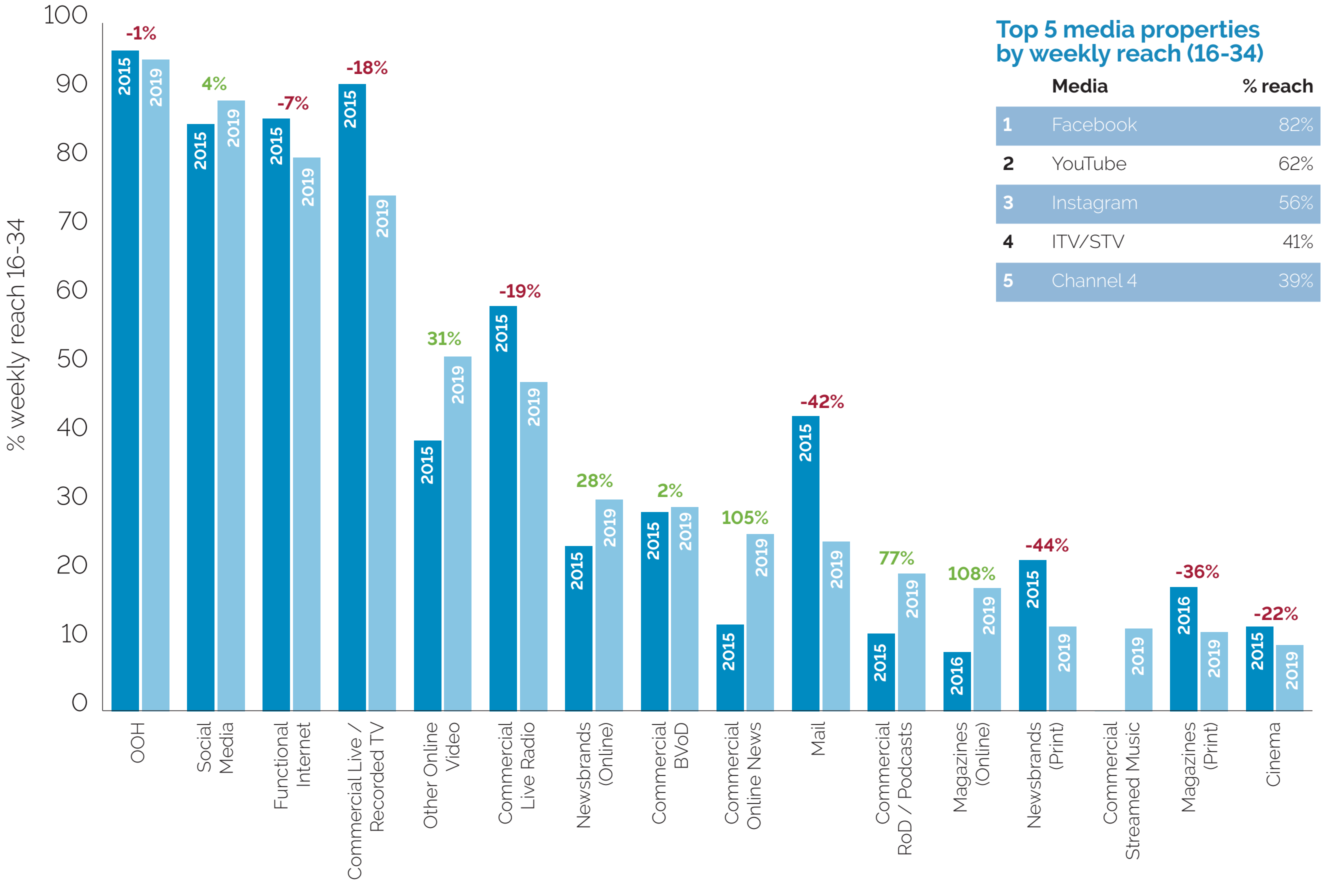
Source: IPA TouchPoints 2019 – The timeline of commercial media consumption across an average day for media with a +3% share of media time (16–34)

Share of total commercial media time broken down by buyable media types[3,4,6]



Source: IPA TouchPoints6 and 2019 Weekly total share of time spent with commercial media for 16-34 in GB broken down by media types

The weekly reach of commercial media channels broken down by buyable media types[3,6]

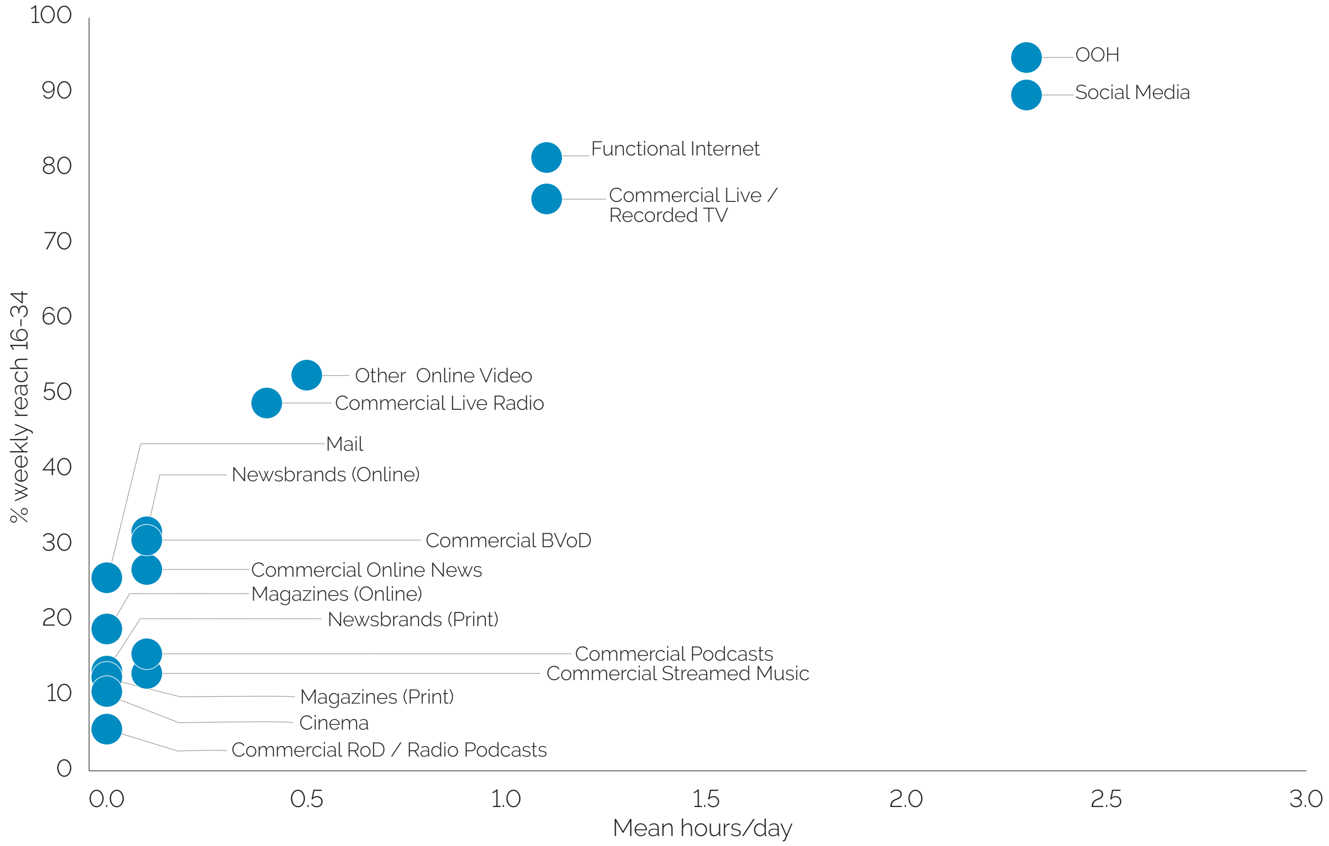


Top 5 media properties by weekly reach (16-34)

	Media	% reach
1	Facebook	82%
2	YouTube	62%
3	Instagram	56%
4	ITV/STV	41%
5	Channel 4	39%

Source: IPA TouchPoints6 and 2019 – Weekly reach of buyable media types for 16-34

The commercial media landscape in 2019 broken down by buyable media types



Source: IPA TouchPoints6 and 2019 – Weekly reach and mean hours per capita per day of buyable media types for 16-34

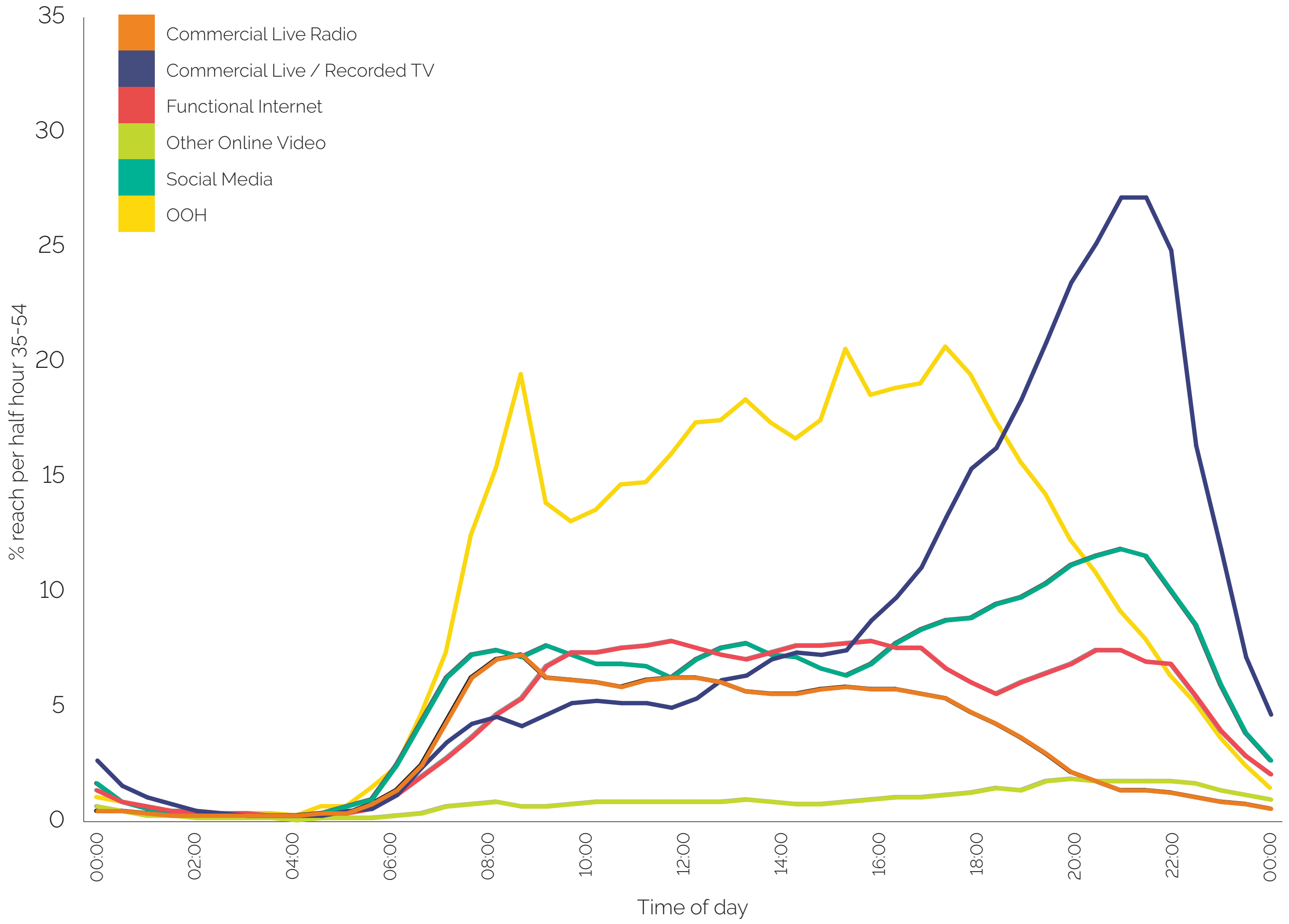
35–54 Some shifts but a similar shape

35–54

As with all age groups OOH reach dominates and builds throughout the day and peaks around 6pm. However, unlike 16-34s Commercial TV dominates in the evening and this age group hasn't seen as much of a shift in the hierarchy of curated commercial media channels since 2015. In the curated space, Commercial TV continues to have the highest weekly reach and the most time spent, with just under a third of all curated media time spent with Commercial TV. Whilst Commercial TV has seen a slight decline in weekly reach, it has seen growth for Commercial BVoD, which now reaches 29% of 35-54s weekly.

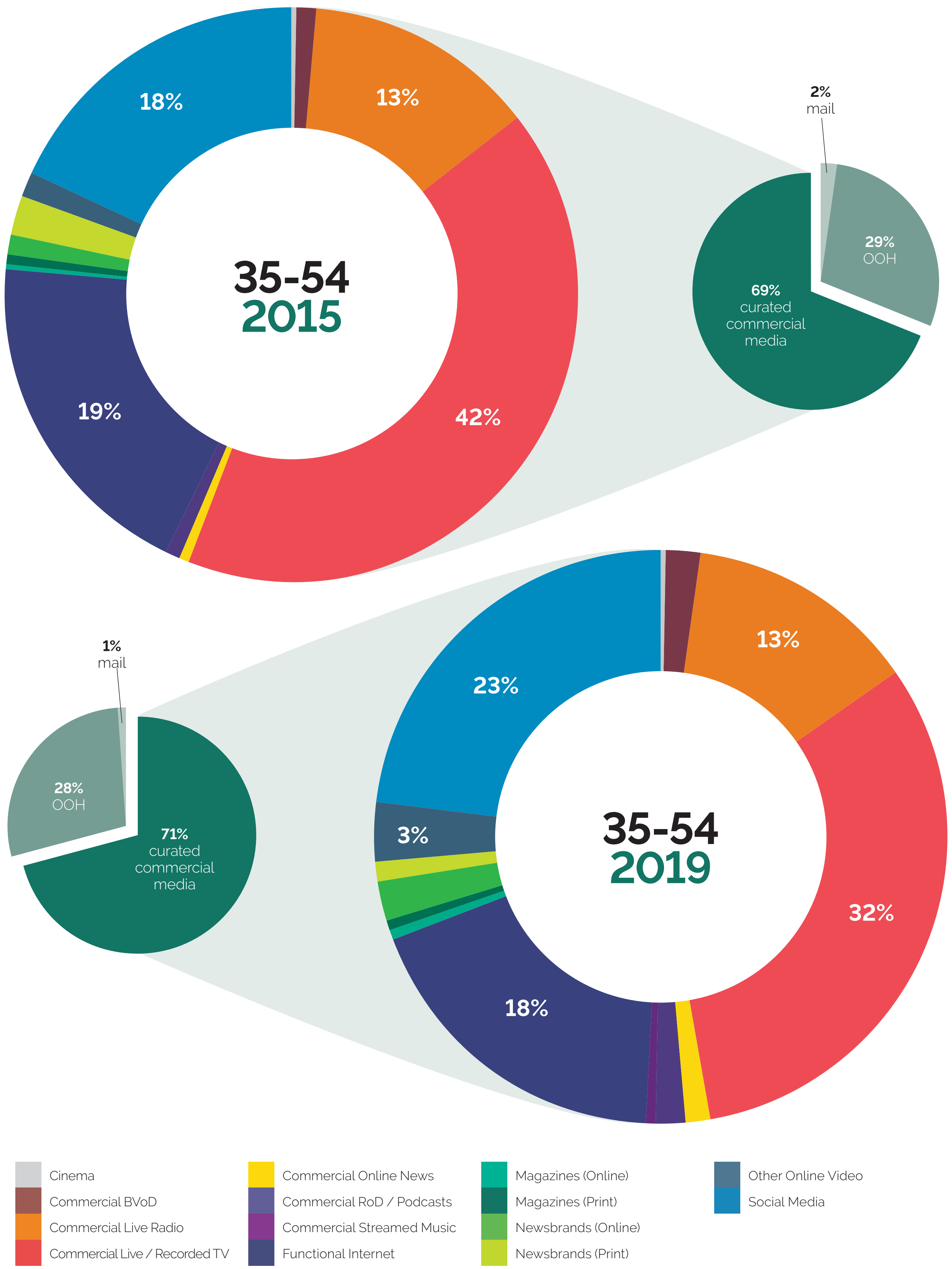
Social Media is now the second largest curated commercial media channel for 35-54s by share of time spent and has seen growth in its weekly reach (+15%) to 78% weekly reach. Newsbrands have seen a shift in hierarchy with Newsbrands (Online) now delivering a higher weekly reach and time spent than Print. Commercial Radio weekly reach and time spent have stayed relatively consistent. The biggest percentage growth in weekly reach has been seen for Commercial Online News (+199%) and Magazines (Online) (+191%).

The timeline of commercial media consumption across an average day for media with a +3% share of media time[5]



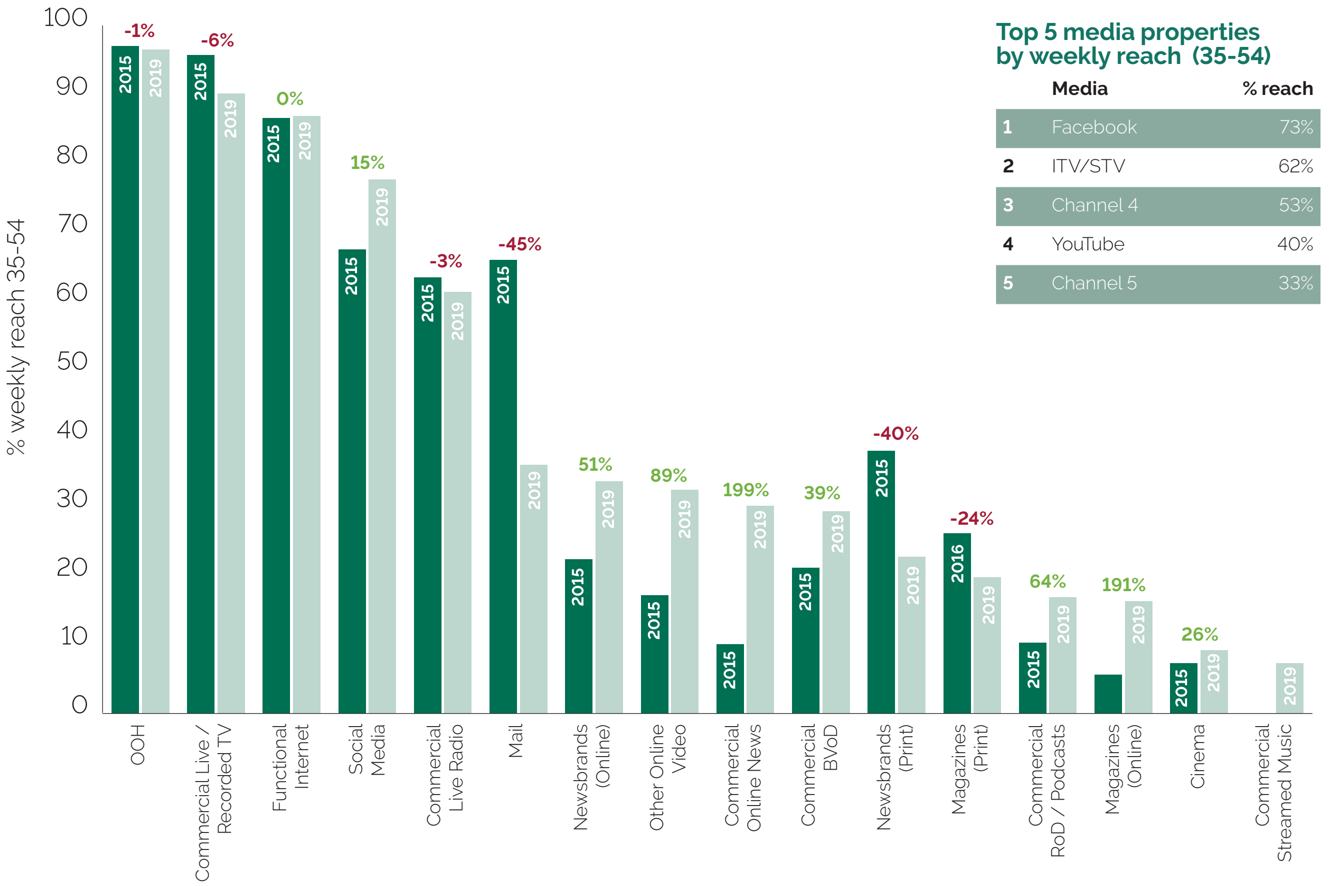
Source: IPA TouchPoints 2019 – The timeline of commercial media consumption across an average day for media with a +3% share of media time (35–54)

Share of total commercial media time broken down by buyable media types[3,4,6]



Source: IPA TouchPoints6 and 2019 Weekly total share of time spent with commercial media for 35-54 in GB broken down by media types

The weekly reach of commercial media channels broken down by buyable media types[3,6]

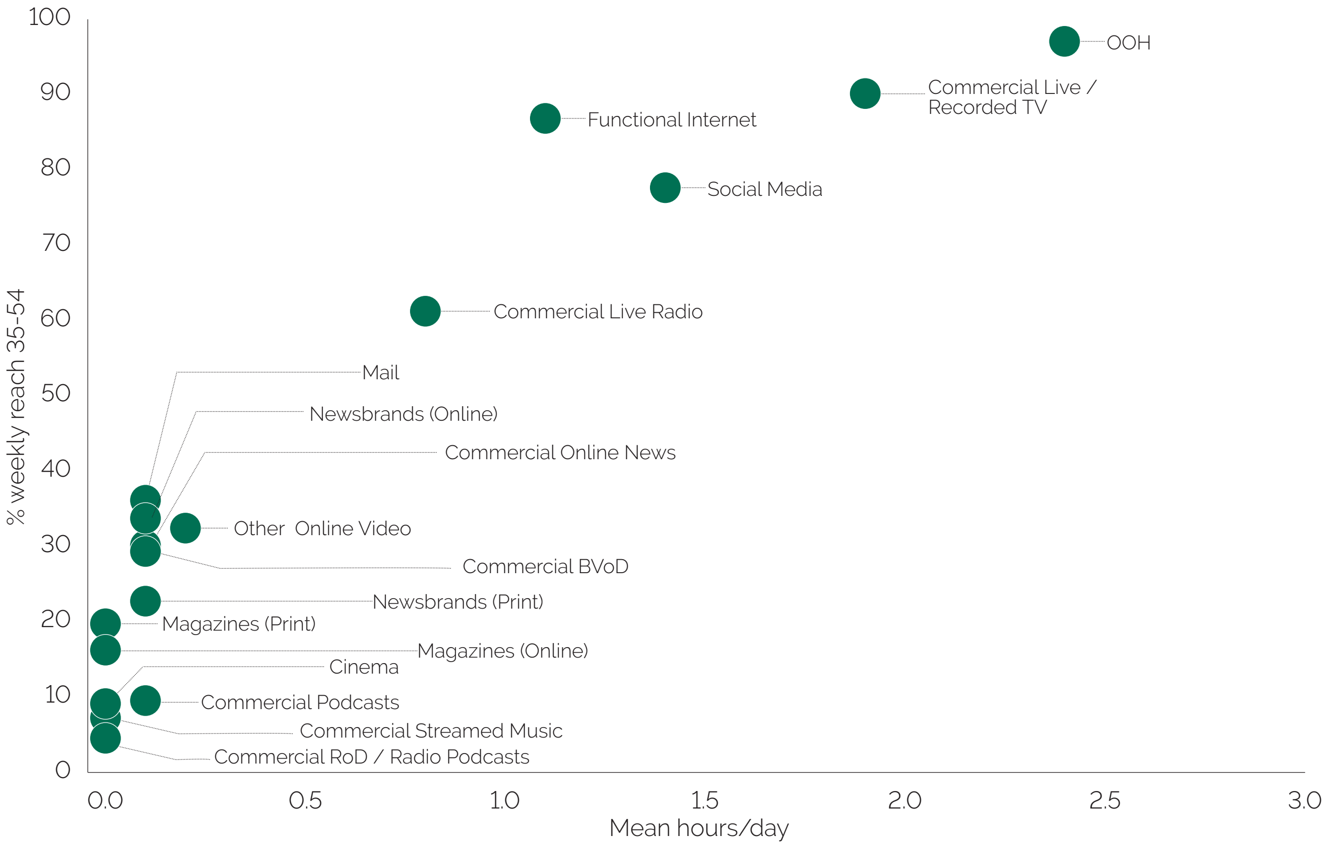


Top 5 media properties by weekly reach (35-54)

	Media	% reach
1	Facebook	73%
2	ITV/STV	62%
3	Channel 4	53%
4	YouTube	40%
5	Channel 5	33%

Source: IPA TouchPoints6 and 2019 – Weekly reach of buyable media types for 35-54

The commercial media landscape in 2019 broken down by buyable media types



Source: IPA TouchPoints6 and 2019 – Weekly reach and mean hours per capita per day of buyable media types for 35-54

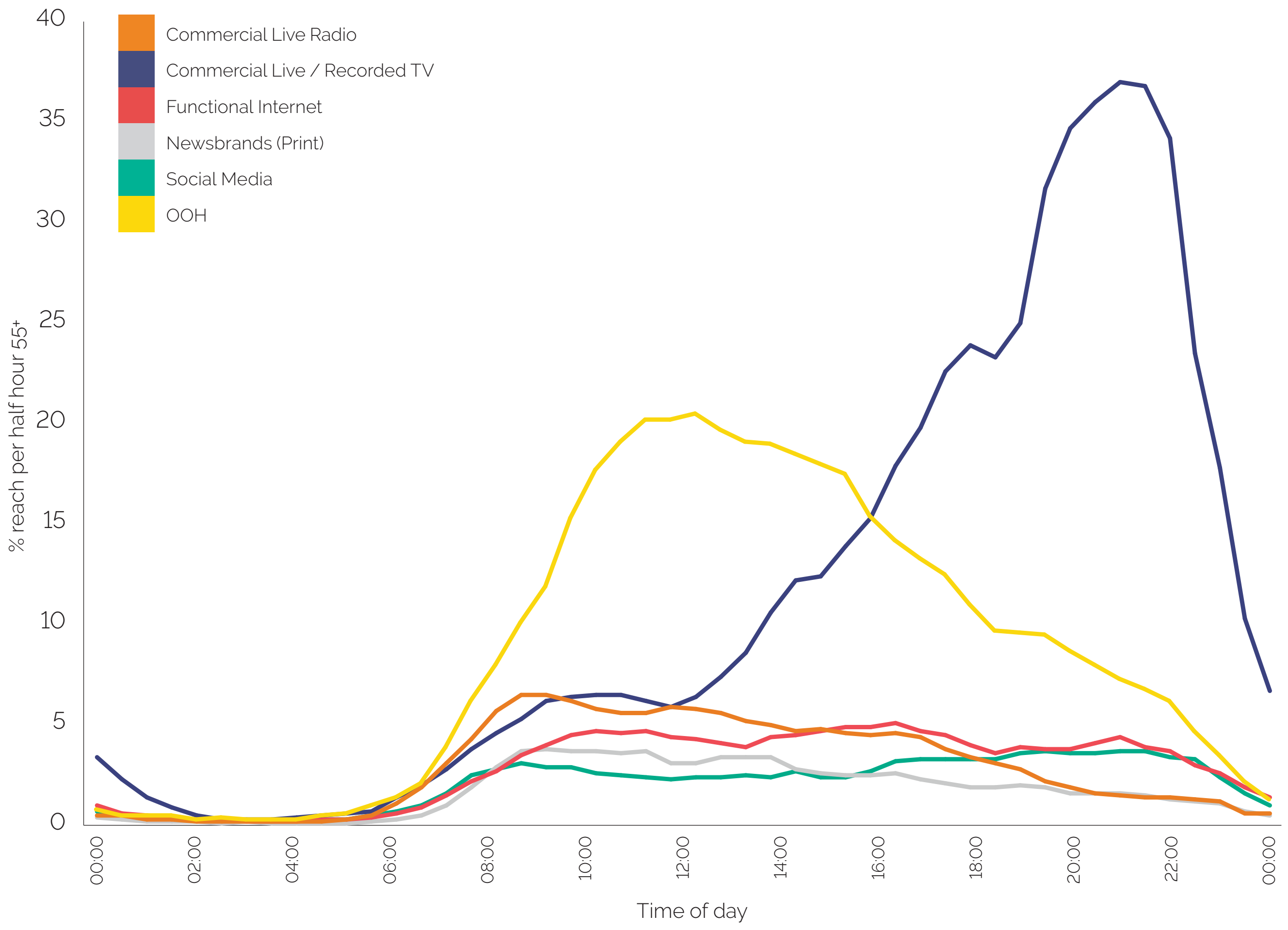
55+ Slow but steady evolution

55+

Of all the age groups, 55+ has seen the least change in commercial media behaviour. For 55+, the correlation between media channel reach in 2015 and 2019 is 93%.

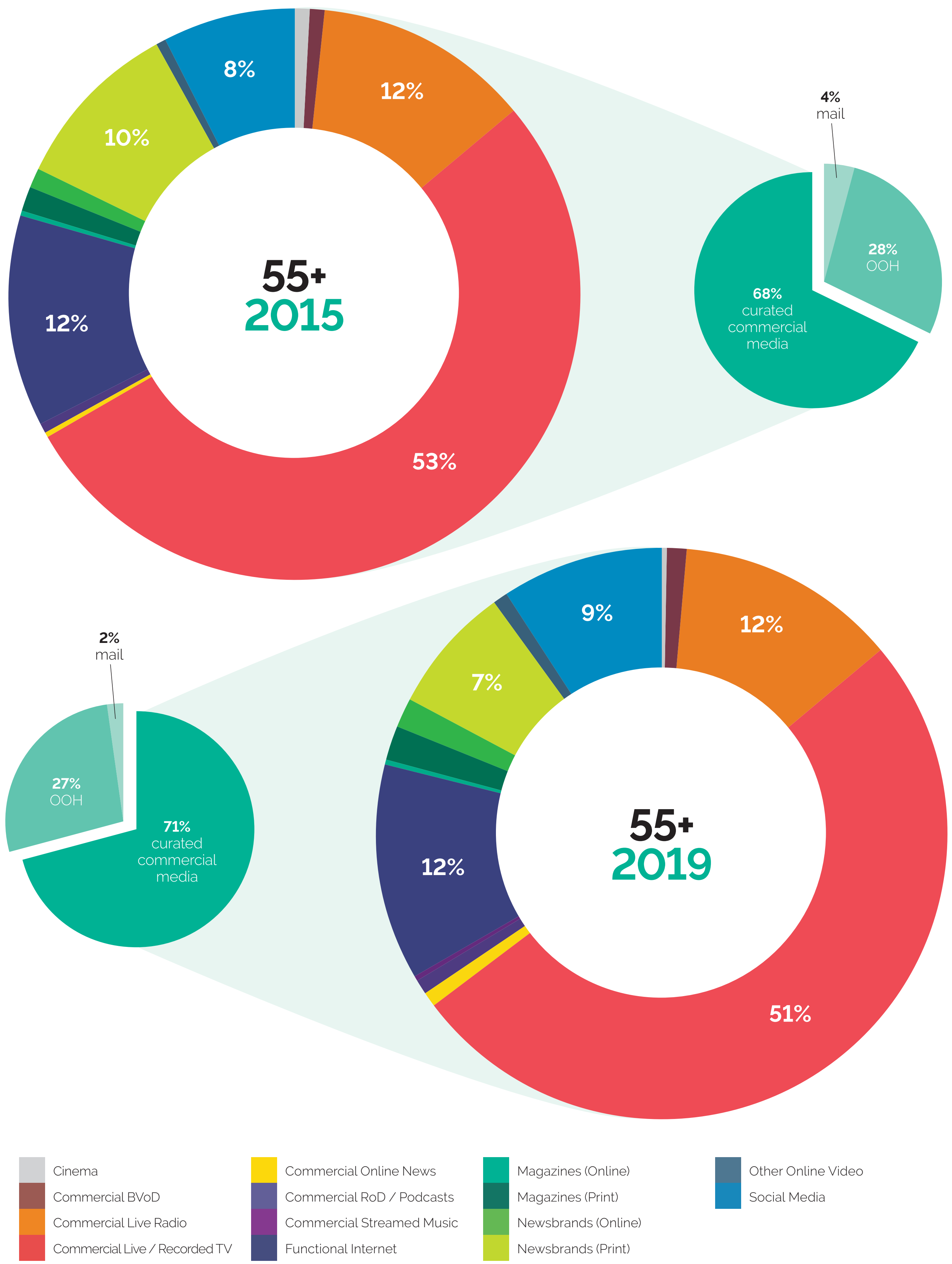
Looking at share of all media time, Mail has seen a two percentage point reduction while OOH remains relatively consistent at only a one percentage point reduction in share and curated media growing three percentage points. Within curated media, Commercial TV continues to dominate both weekly reach and time spent. Whilst the shape of 55+ media consumption has remained broadly the same, there have been several small shifts. The weekly reach of Newsbrands (Print) has fallen by 20% (yet still reaches 53% of 55+ weekly), whilst Social Media and Commercial BVoD have increased by 17% and 48% respectively. A similar pattern can be seen in share of time spent, with Newsbrands (Print) declining by three percentage points and Social Media up by two. This means for the first time 55+ now spend on average longer on Social Media (9% media time) than reading Newsbrands (Print) (7% media time). While total Newsbrands (Print and Online) take the same 9% share as Social Media. As with younger age groups, Commercial Live Radio has stayed consistent from a time spent perspective but has seen a small decline in overall weekly reach (-5%).

The timeline of commercial media consumption across an average day for media with a +3% share of media time[5]



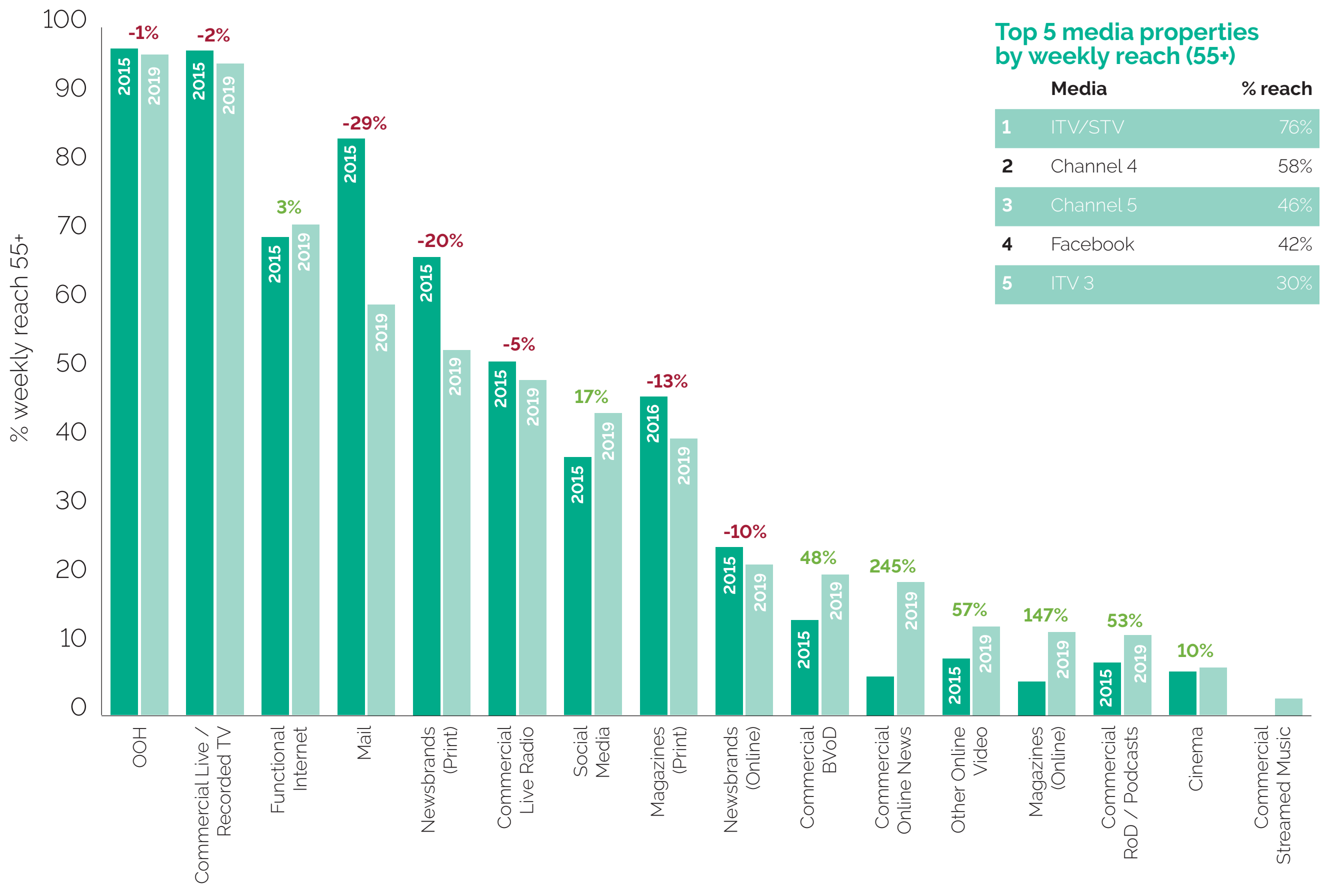
Source: IPA TouchPoints 2019 – The timeline of commercial media consumption across an average day for media with a +3% share of media time (55+)

Share of total commercial media time broken down by buyable media types[3,4,6]



Source: IPA TouchPoints6 and 2019 Weekly total share of time spent with commercial media for 55+ in GB broken down by media types

The weekly reach of commercial media channels broken down by buyable media types[3,6]

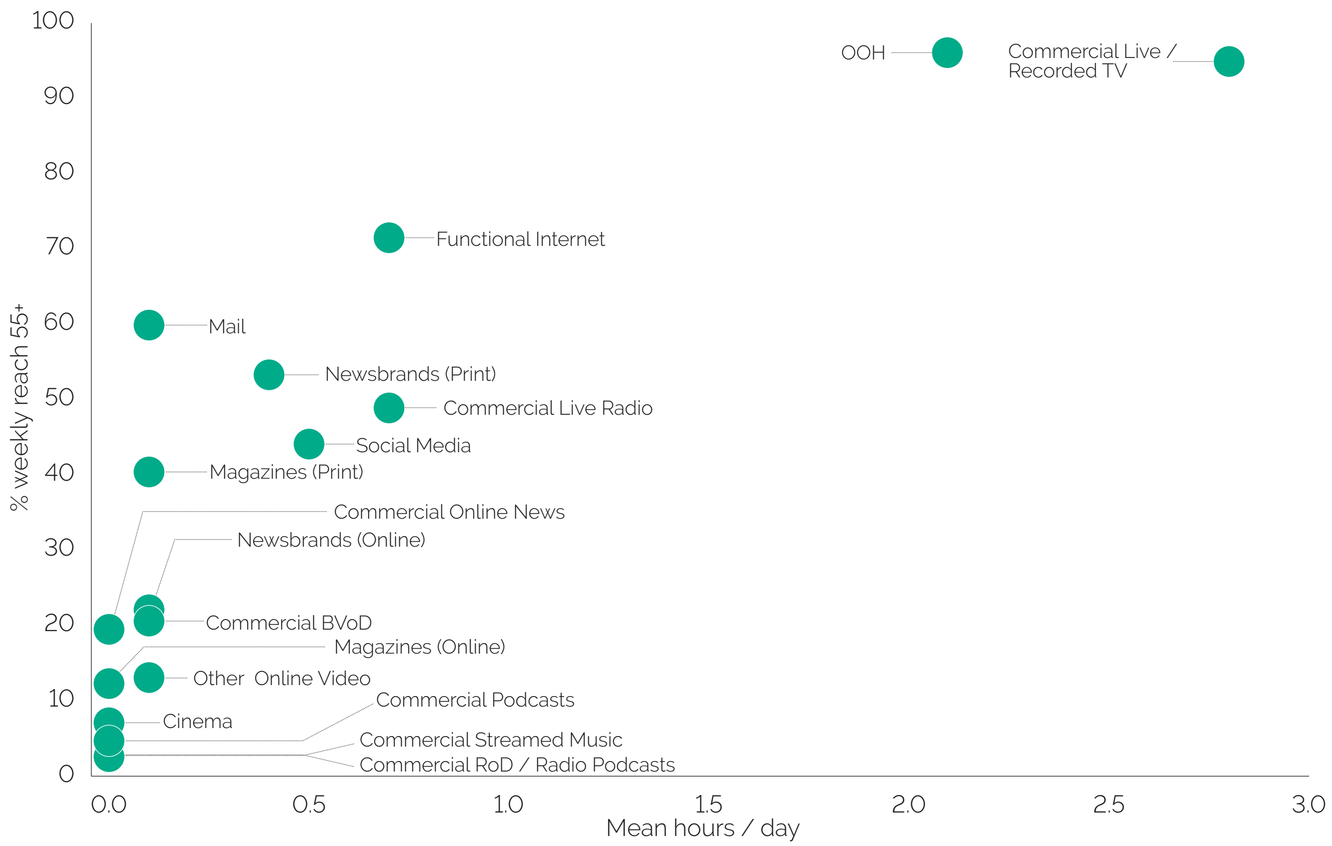


Top 5 media properties by weekly reach (55+)

	Media	% reach
1	ITV/STV	76%
2	Channel 4	58%
3	Channel 5	46%
4	Facebook	42%
5	ITV 3	30%

Source: IPA TouchPoints6 and 2019 – Weekly reach of buyable media types for 55+

The commercial media landscape in 2019 broken down by buyable media types



Source: IPA TouchPoints6 and 2019 – Weekly reach and mean hours per capita per day of buyable media types for 55+

Analysis

Les Binet, Group Head of Effectiveness – adam&eveDDB

These are exciting times. We are in the middle of the biggest transformation in media consumption since broadcasting began in the 1920s, and the revolution continues. Marketers are discovering new ways to reach and influence people and, used correctly, these new tools can dramatically increase marketing effectiveness.

But it can sometimes be hard to see the wood for the trees. Our industry has always been susceptible to hype and fashion, but things seem to be getting worse. It's an odd paradox that the more information we have at our fingertips, the less we seem to understand what's really going on.

So thank God for TouchPoints. As far as I know, this is the only readily-available data source that measures all media on a consistent like-for-like basis. And because the TouchPoints team have been doing that for 15 years now, they can give us a fantastic bird's-eye view of the changing media landscape.

A great deal has changed since the first TouchPoints study in 2005, but perhaps the biggest surprises here are the things that have stayed constant. Looking at the big picture, it's clear that the overall patterns of media consumption have changed remarkably little. The amount of time we spend with curated media has not changed much, the mix of video, audio and text has remained surprisingly stable, and the way we shift between these things during the course of the day is almost exactly the same as it was 15 years ago.

But the way we access these media has changed remarkably, with a shift to digital delivery becoming the norm for every channel. Contrary to popular belief, the biggest shift so far has been away from print, not broadcast. But these trends will no doubt continue, and one day all media will be digital. Indeed, the phrase 'digital media' is beginning to seem rather quaint, and about as relevant as 'electrical media'.

While broadcasters and news outlets are shifting online, the internet itself is beginning to look a little more like the traditional media landscape. I was fascinated to see that functional internet usage (the world of websites and search engines) is actually falling amongst young people. Instead youngsters increasingly access content via social media (which look a lot more like newspapers these days) and online video channels (which are beginning to look a lot more like TV).

Unsurprisingly, young people have been in the vanguard of these changes. But beware the lazy assumption that they no longer consume 'traditional' media. TouchPoints shows that for 16-34s Facebook, YouTube and Instagram are the top channels in terms of reach, but ITV and Channel 4 are not far behind.

Meanwhile, older people remain a bit stuck in their ways. If you want to tap the economic potential of all those affluent empty-nesters, you'd be a fool to ignore good old TV.

So, as William Gibson said, the future is already here, but it's just not evenly distributed. New ways of consuming media are filtering up through society, but much more slowly than most pundits predicted 20 years ago. Different age groups now have very different patterns of media consumption, and this is likely to persist. Indeed, the great Digital Transformation probably won't be complete until the pre-internet generation is dead and buried.

This makes life more complex for marketers, but it also makes it more interesting. We need to master a wider range of channels now, but we can use them to evoke a wider range of effects. Enthusiasm, hype and fashion are not enough in this confusing landscape – we need solid evidence. As always, the TouchPoints team have made a valuable contribution with this report.

Appendices

Notes

1. We've focused on 2019 because it is the latest dataset, and 2015 since this represents the point when media definitions of the TouchPoints study were standardised.
2. Digital refers to any form of media which requires an internet connection, Non-Digital refers to media which does not require an internet connection.
3. All Magazines (Print) and Magazines (Online) data are taken from IPA TouchPoints 2016 rather than the 2015 study. This is due to a change in question which made 2015 not comparable with 2019 data.
4. For ease of presentation, we have only provided data callouts for commercial media properties with a share of greater than 3%.
5. These are the media properties which are shown in the pie charts as taking a minimum of 3% share of total commercial media time for the stated audience.
6. Trended 2015 data for commercial podcasts have been omitted on the basis that it is only possible to look at this in TouchPoints from 2017 onwards.

Media Definitions

Chart 1 – The patterns of media consumption 2005 – 2019

Audio – Any audio content listened to in any way
Text – Any Newsbrand or Magazines content read in any way
OOH – Time spent in out-of-home environments where there is an opportunity to see OOH advertising
Video – Any video content viewed in any way

Definitions Used Throughout the Report

Cinema – Time spent at the cinema
Commercial BVoD – Video which is made available online by a commercially driven UK broadcaster (not including live TV) (e.g. ITV Player, All 4)
Commercial Live Radio – Live radio which is broadcast on a radio set or online by a commercially driven UK broadcaster (e.g. Smooth Radio)
Commercial Live/Recorded TV – TV programmes/films which are broadcast by/recorded from a commercially driven UK broadcaster (e.g. ITV, Channel 4)
Commercial Media – Curated media which is commercially funded, including: Cinema, Commercial Online News, Commercial Podcasts, Commercial Radio / RoD / Radio Podcasts, Commercial Streamed Music, Commercial TV Live / Recorded / BVoD, Functional Internet, Magazines, Newsbrands, Other Online Video, Social Media
Commercial Online News – Any commercially funded online news content which does not originate from a UK publisher (e.g. Sky News, Yahoo! News)
Other Online Video – Any commercially funded online video which is not made available by a UK broadcaster (e.g. YouTube, Vimeo)
Commercial Podcasts – Audio which is made available by a commercially driven podcast provider (e.g. Acast)
Commercial Radio/RoD/Radio Podcasts – Audio which is broadcast/made available by a commercially driven UK broadcaster (e.g. Smooth Radio, Global Player)
Commercial RoD/Podcasts – Audio which is made available online by a commercially driven UK broadcaster (not including live radio) or any commercially driven podcast provider. (e.g. Smooth Radio, Global Player, Acast)
Commercial RoD/Radio Podcasts – Audio which is made available online by a commercially driven UK broadcaster (Not including live radio) (e.g. Smooth Radio, Global Player)
Commercial Streamed Music – Audio which is made available by a commercially driven audio streaming platform (e.g. Spotify, SoundCloud)
Commercial TV Live/Recorded/BVoD – Video which is broadcast/made available by a commercially driven UK broadcaster (e.g. Channel 4, All 4)
Curated Commercial Media – Commercial media channels which are content driven
Functional Internet – Any usage of commercially funded websites which is not for media, social media or communication (e.g. search, shopping, researching)
Magazines – Any commercially funded Magazines content which originates from a UK publisher in print or online (e.g. Heat, Angling Times)
Magazines (Online) – Any commercially funded Magazines content which originates from a UK publisher online (e.g. Heatworld.com)
Magazines (Print) – Any commercially funded Magazines content which originates from a UK publisher in print (e.g. heat)
Mail – Time spent looking at / reading post and mail
Newsbrands – Any commercially funded newspaper content which originates from a UK publisher in print or online (e.g. Daily Mail/ MailOnline)
Newsbrands (Online) – Any commercially funded newspaper content which originates from a UK publisher online (e.g. MailOnline)
Newsbrands (Print) – Any commercially funded newspaper content which originates from a UK publisher in print (e.g. Daily Mail)
Non-Commercial Curated Media – Curated Media which is not commercially funded, including: BBC, Netflix, Spotify Premium etc.
OOH – Time spent in out-of-home environments where there is an opportunity to see OOH advertising
Other Online Video – Any commercially funded online video which is not made available by a UK broadcaster (e.g. YouTube, Vimeo)
Social Media – Any commercially funded social networking site or app (e.g. Facebook, Twitter, Instagram)

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