

Trending 2024

a vision from the IPA & Foresight Factory



Welcome

Eric Kreis
Insight Manager, IPA

Pulse poll Mental Health in the Workplace

January 2024



Mental health support available in the workplace: Less than a quarter say their employer has a mental health policy

"Which of the following, if any, does your employer currently offer or have, in support of mental health and wellbeing? Select all that apply" | November 2023

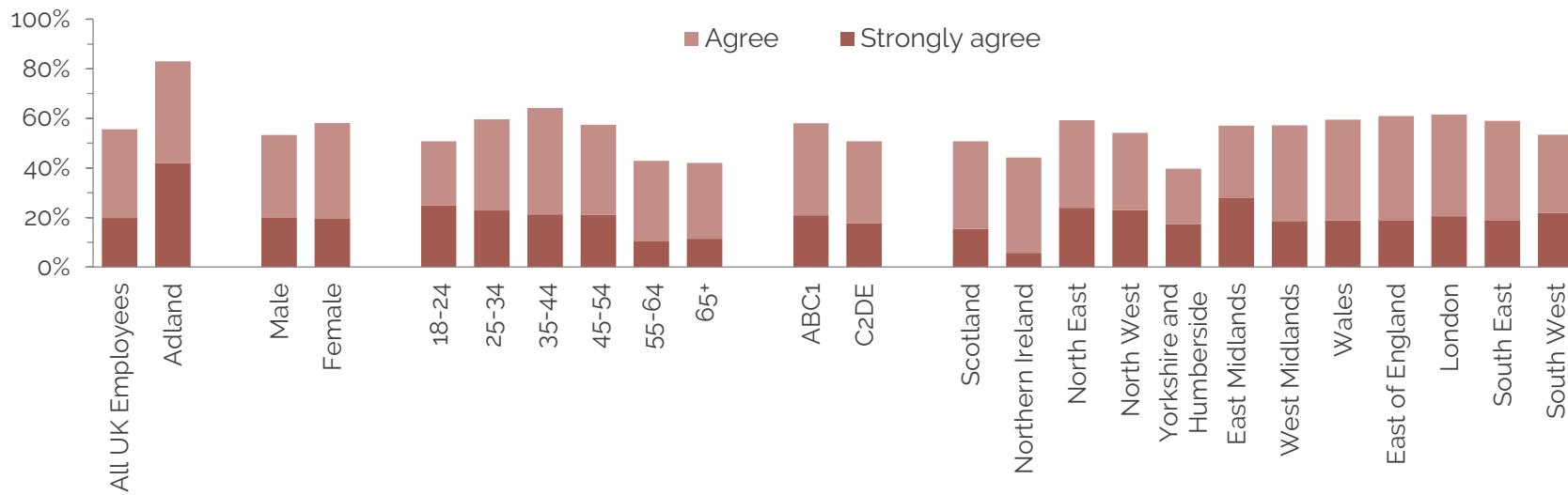


Source: Institute of Practitioners in Advertising (IPA), Opinium
Base: 1,265 online respondents (currently employed) aged 18+, UK, November 2023

"I would be concerned about taking time off work for my mental health if I had a high workload"

"To what extent do you agree or disagree with the following statements about mental health and wellbeing support in your workplace?" |

% strongly agree or agree, by demographic | November 2023

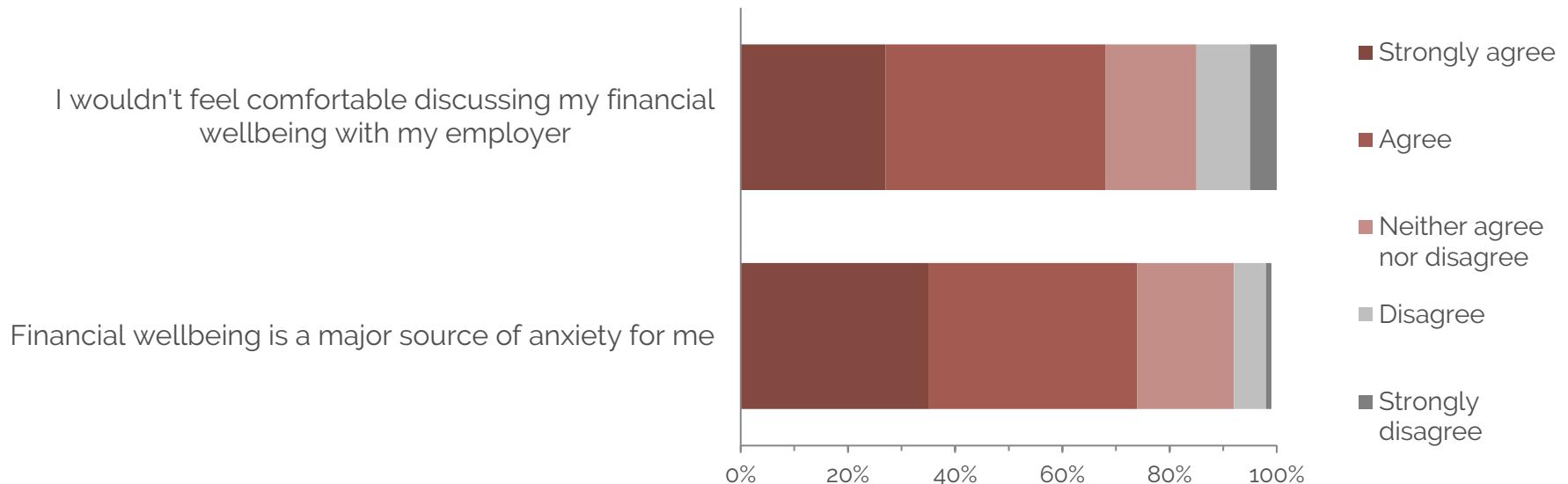


Source: Institute of Practitioners in Advertising (IPA), Opinium

Base: 1,265 online respondents (currently employed) aged 18+, UK, November 2023

The forgotten taboo? 'Financial wellbeing' is a major source of anxiety for three-quarters of advertising professionals

"And to what extent do you agree or disagree with the following statements about mental health and wellbeing support in your workplace?" | December 2023



Source: Institute of Practitioners in Advertising (IPA), Opinium

Base: 100 online respondents (advertising/marketing professionals), aged 18+, UK, December 2023

insight@ipa.co.uk



Reckoning with reality

Marta Vilella-Vila

Client Partner, Foresight Factory

David Crosbie

Consumer Trends Editor, Foresight Factory



Trending 2024

Reckoning with Reality

Reckoning with what it means to...



Be
HUMAN



Be
HEALTHY



Be
SUSTAINABLE



BELONG



Be HUMAN



Be HEALTHY



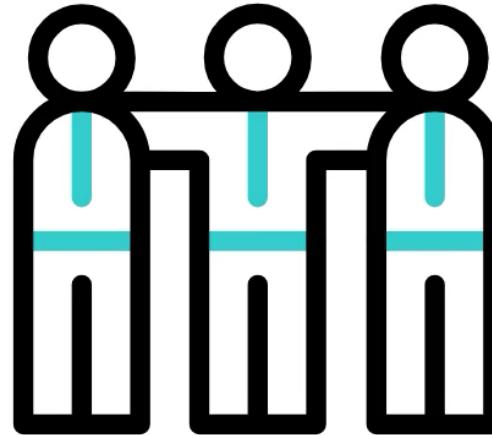
Be SUSTAINABLE



BELONG

2024

Things you'll see
more of...



Biggest
election year in
history with
4bn people
going to the
polls

Weight loss
drugs and their
economic
effects

Generative AI
changing the
media &
marketing
industry

Reckoning with what it means to be **HUMAN**



What's the reckoning?

Explosion of interest in AI across all areas of life

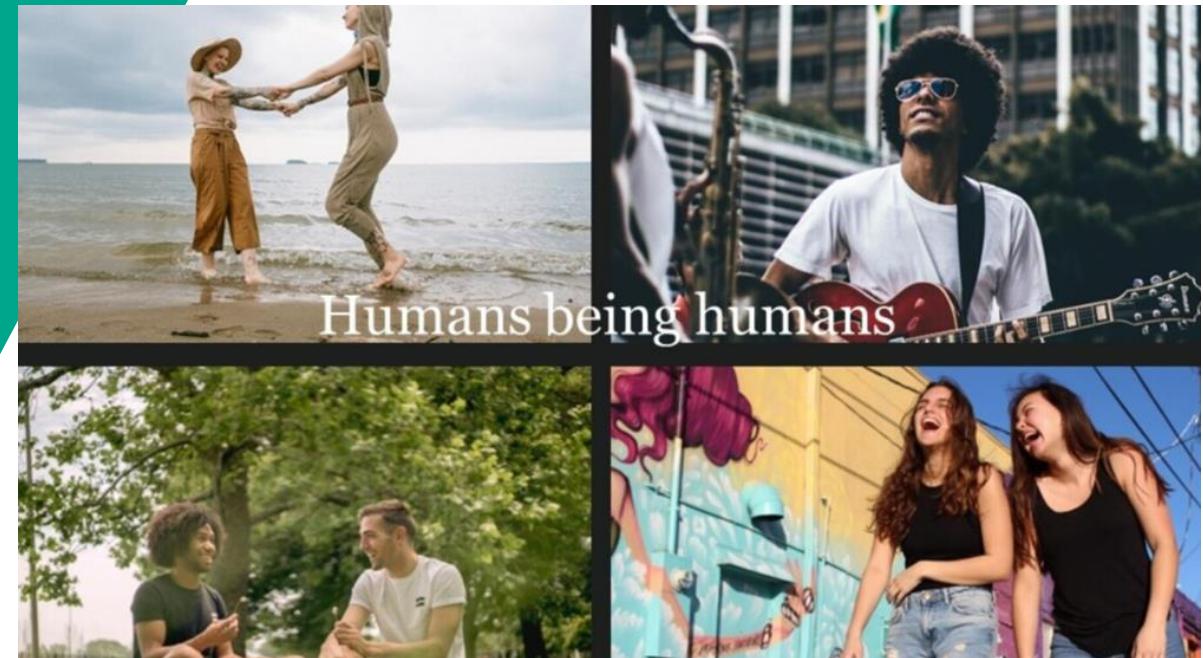


55%

Global consumers are interested in **entertainment** (e.g. A TV show, video, music, game) **entirely created by AI**

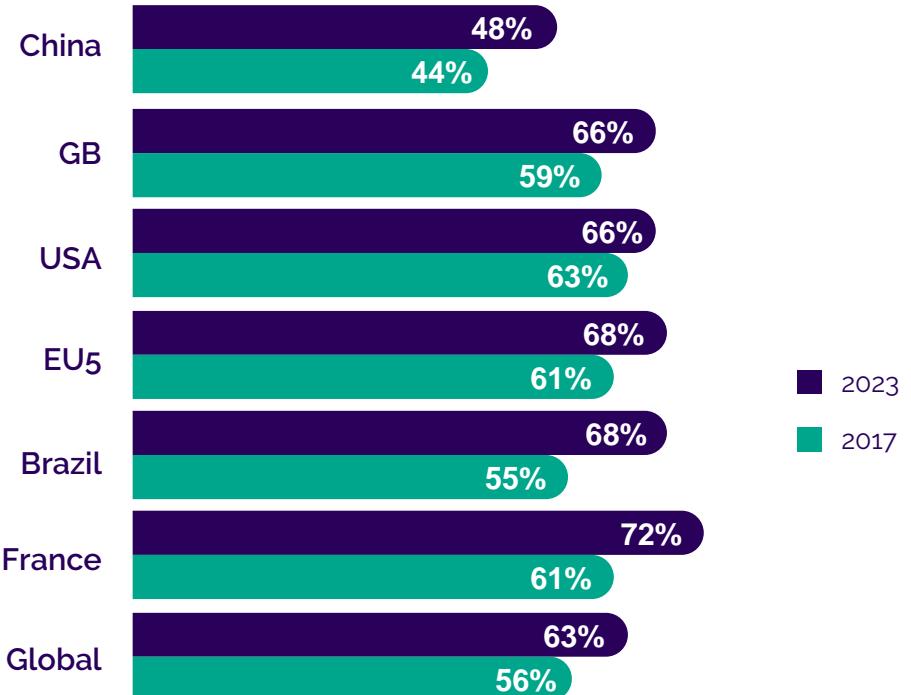
What's the reckoning?

On the other hand,
#humancore
emerges as a
counter to AI



What's the reckoning?

Belief that companies should prioritise human employment



% who agree: 'Companies should **prioritise employing humans over robots** / automated services even if it means they have to charge higher prices'

How to humanize your brand in the age of AI?

Communicate you
are a 'human first'
brand

The technology you need.  The humans you want.



How to humanize your brand in the age of AI?

Experiment with
conversational AI

Virtual
Question
& Answer



UK Coaching creates an interactive video experience that allows consumers to "interview" Olympic star Dame Kelly Holmes

How to humanize your brand in the age of AI?

Make it clear when images have been generated or edited with AI



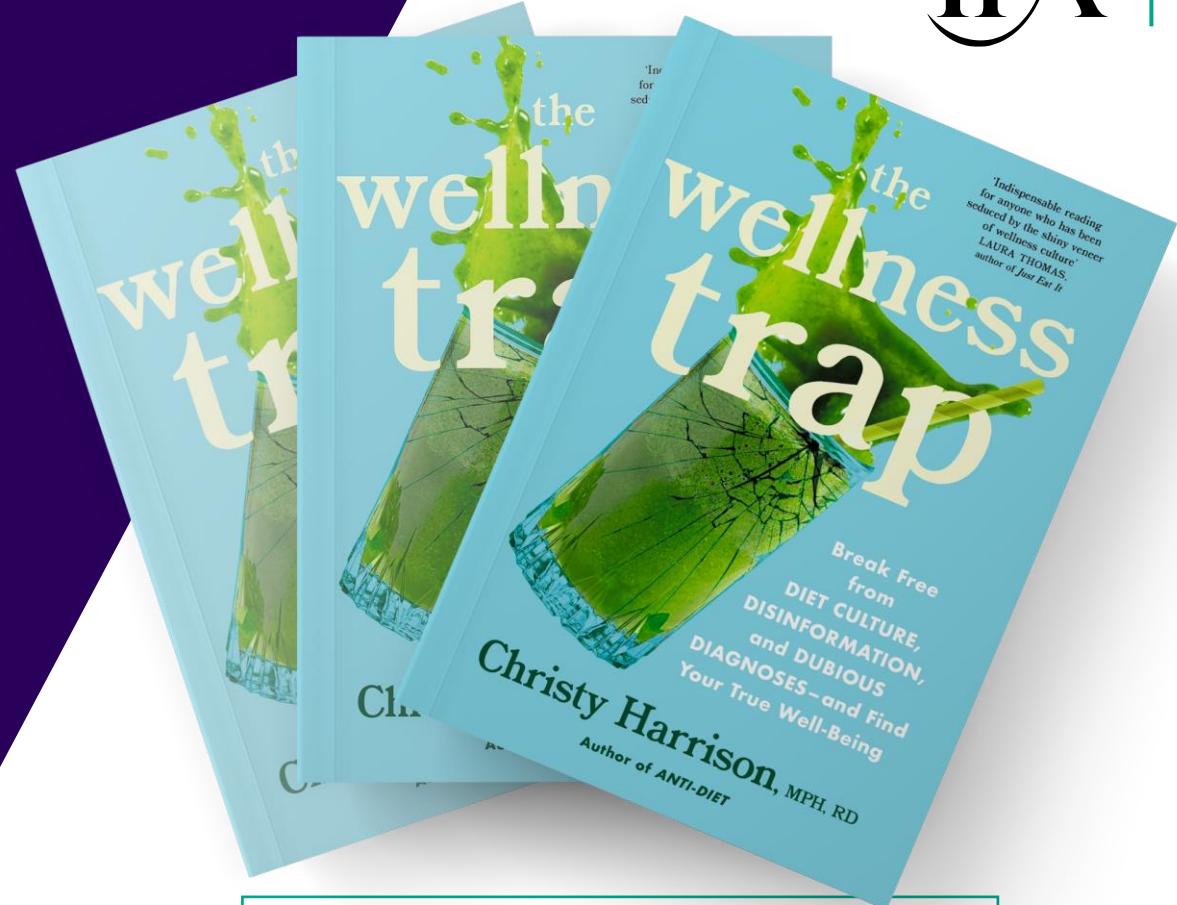
On Instagram, **fit_aitana** is an AI model known as Aitana Lopez who is followed by almost 250,000 people

Reckoning with what it means to be **HEALTHY**



What's the reckoning?

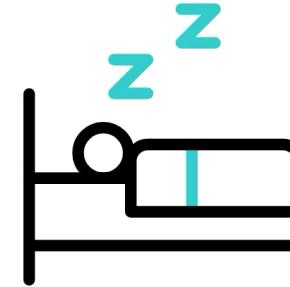
Emerging backlash
against the
wellness industry



World's oldest person on the keys to longevity: 'stay away from toxic people'

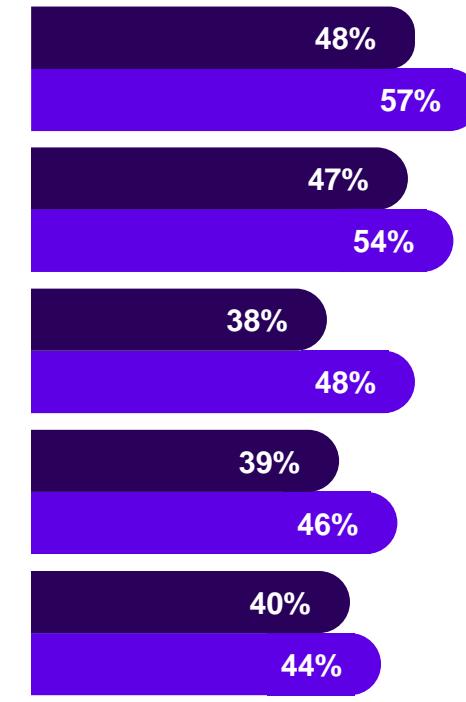
Wellness activities

Back to basics
health habits prevail



- Get a good amount of sleep
- Exercise regularly
- Eat a balanced diet
- Get a good amount of rest and leisure time
- Spend time with friends and family

Global 24 country average



What's the reckoning?

On the other hand,
reportedly ground-
breaking health
innovations are
constantly hitting
headlines

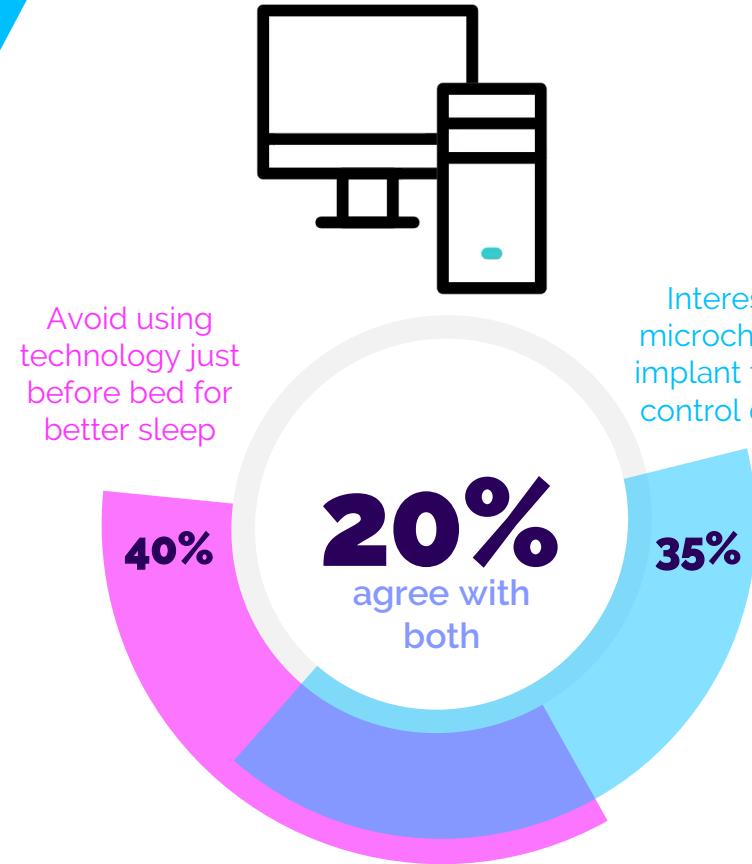


24%

Monitor sleep patterns
via smartphone / using
another device

Embracing tech?

Conflict exists in how much consumers are happy for tech to infiltrate their lives



Health & wellness in 2024. Strategic imperatives

Aim to make wellness accessible for the many



Health & wellness in 2024. Strategic imperatives

Go beyond awareness, make a real difference

On Melanoma Monday in May 2023, skincare brand **La Roche-Posay** partnered with a medical group to bring free skin cancer screenings to the streets of New York

Health & wellness in 2024. Strategic imperatives

Build in features that promote mental and social wellness





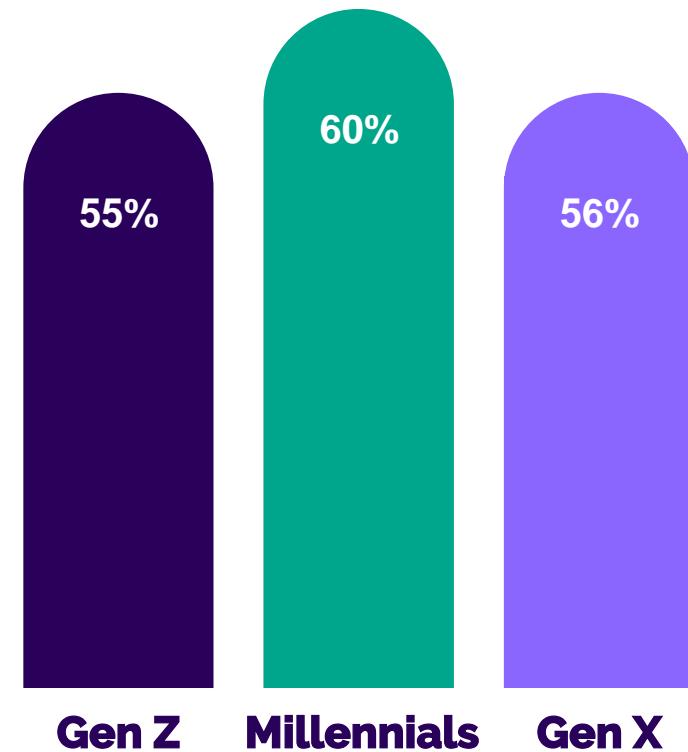
Reckoning with what it means to be **SUSTAINABLE**



What's the reckoning?

Increasing evidence of the impact of climate change

"I am **more likely to buy** from companies that are working to reduce climate change"



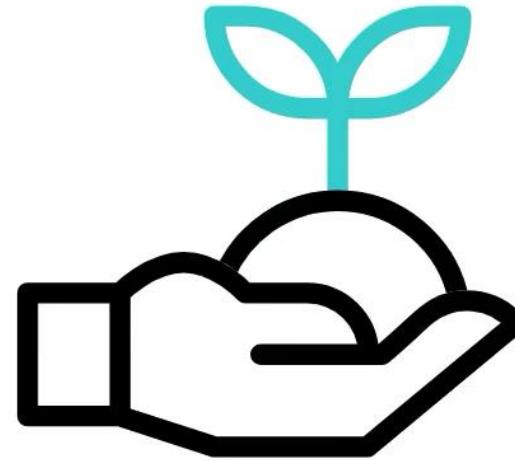
The bumpy road to net zero

Growing signs of opposition to net-zero measures



What's the reckoning?

Planetary and monetary concerns collide



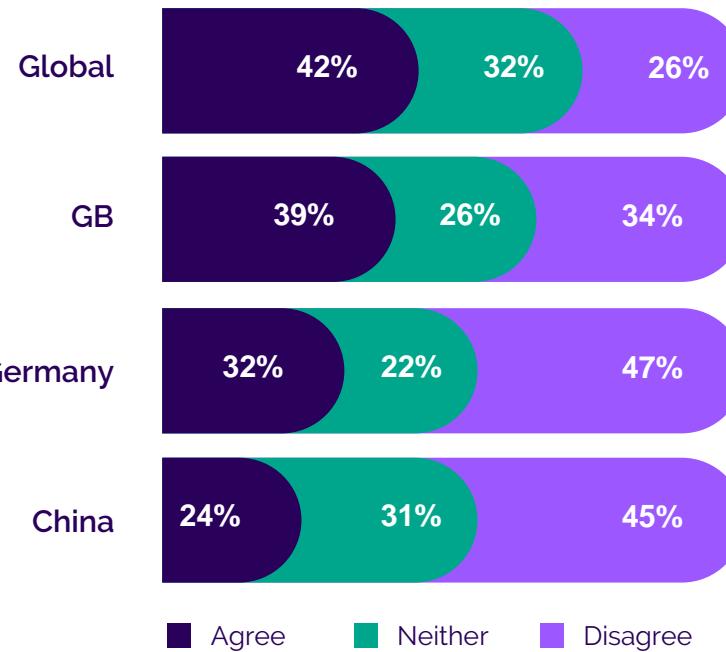
42%

Economic growth must be a priority, even if negative for environment.
Up from 33% in 2020.

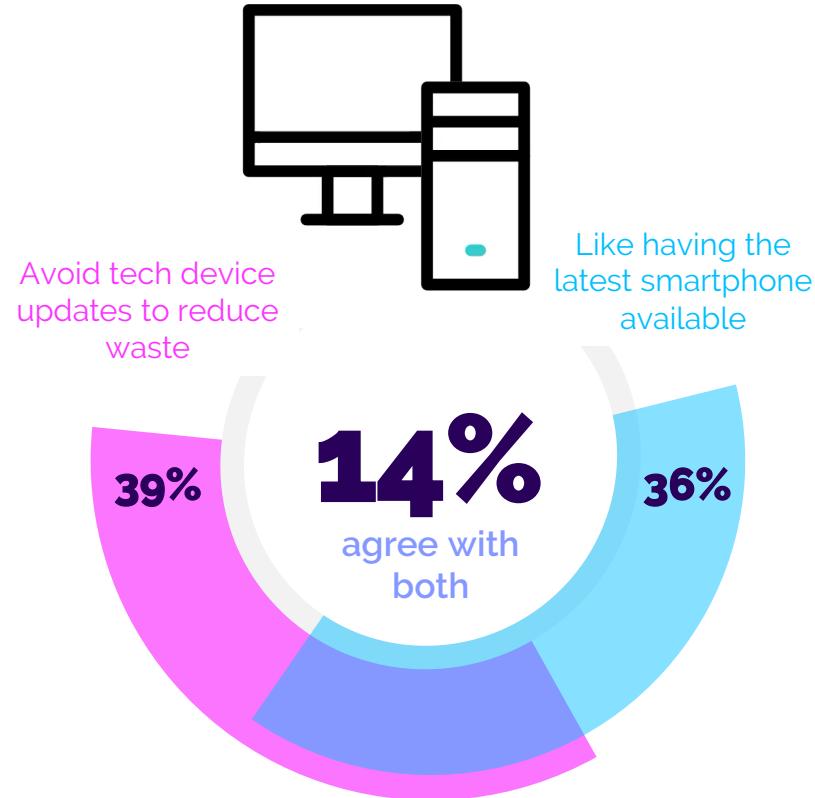
Climate protests

Not always supported

% globally who agree/disagree they **support climate activists, even if their protests disrupt their life**

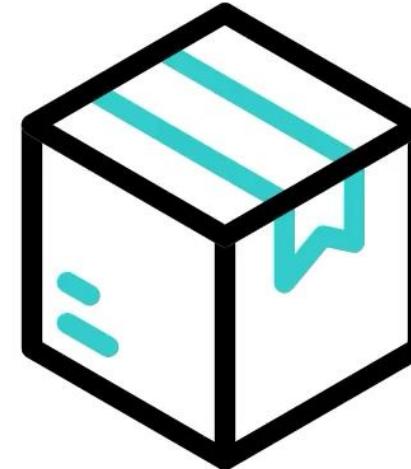


Tech-waste tensions highlighted by desire for latest upgrades



In this polarized context...

Transparent,
digestible and
balanced
information and
advice are key



59%

Agree they want brands they buy from to clearly display the **carbon footprint** of their products on packaging.

How to embrace sustainability in 2024?

Be honest about the cost of saving the planet



How to embrace sustainability in 2024?

Encourage green truth telling



WE BOUGHT THIS TWO-PAGE AD TO TELL YOU WE'VE BEGUN INCLUDING CLIMATE FOOTPRINT NUMBERS ON OUR PRODUCTS.



AND WE'RE DONATING THIS PAGE TO THE DAIRY INDUSTRY SO THEY CAN TELL YOU THEIR CLIMATE FOOTPRINT NUMBERS TOO.



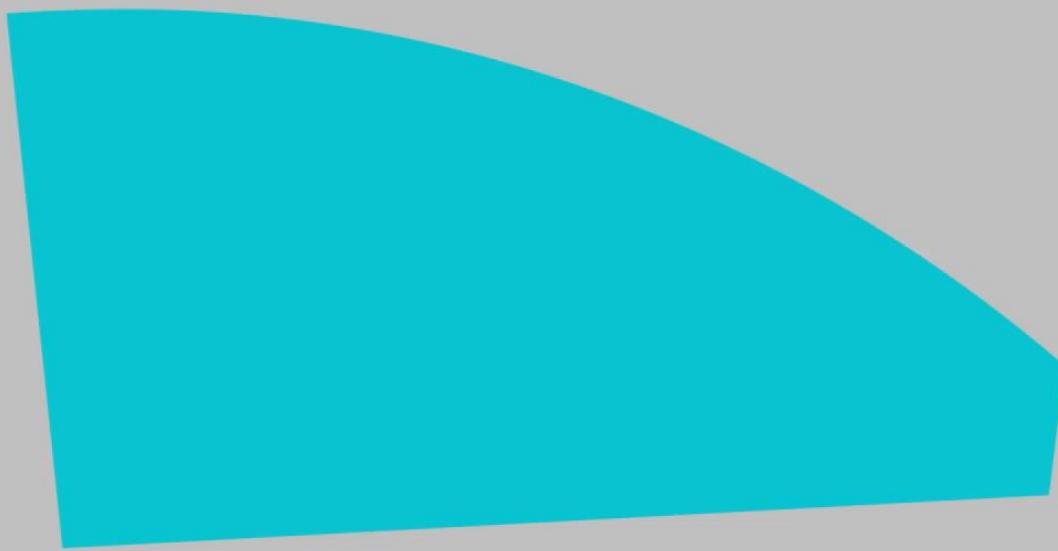
SCAN TO APPLY!
AND OTHER
OFFICIAL STUFF



How to embrace sustainability in 2024?

Clearly set out the sacrifices that must be made





Reckoning with what it means to **BELONG**



What's the reckoning?

Growing signs of fragmentation...

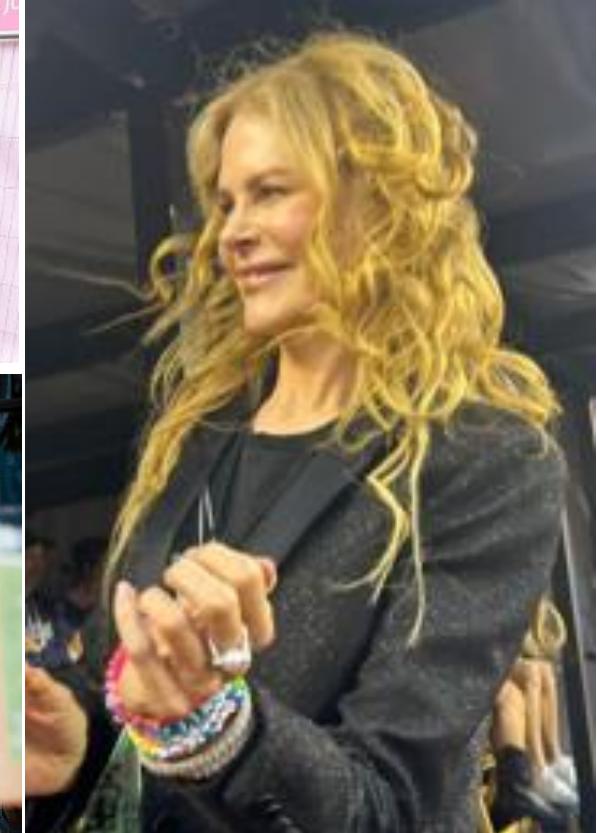


30%

Less than half of the population globally
trust their national politicians.

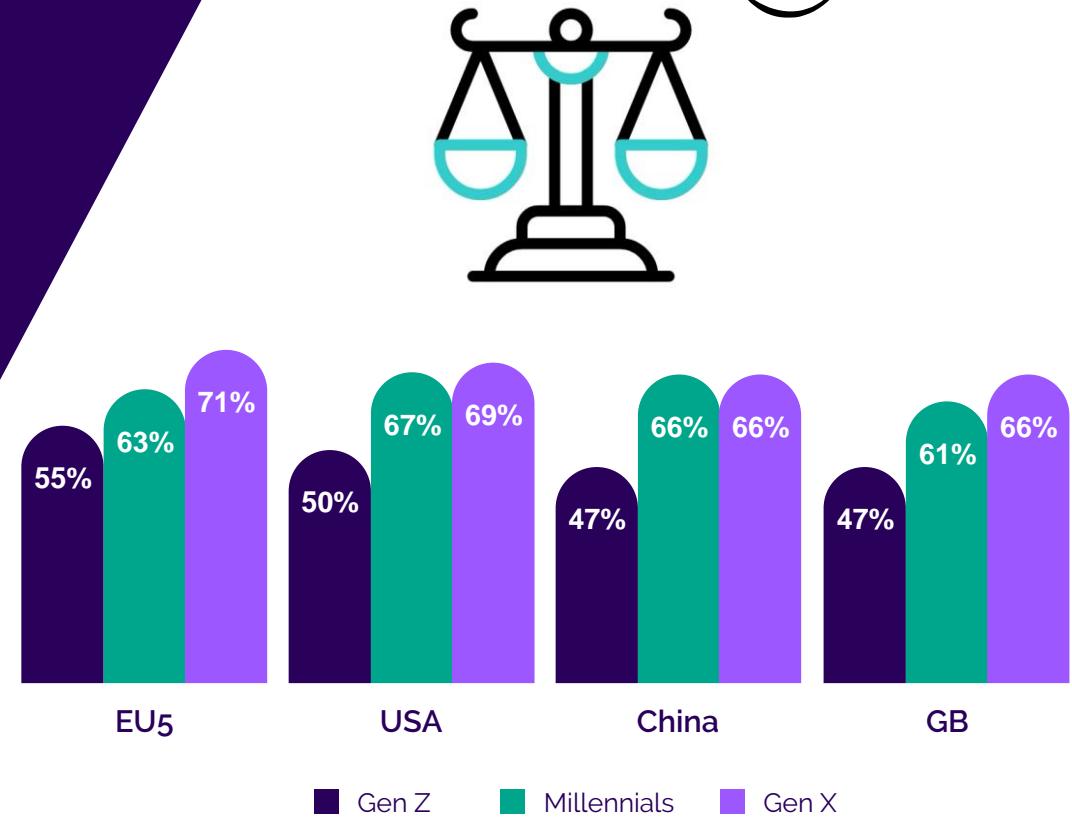
What's the reckoning?

New ways to belong to something bigger than ourselves



Focus on the individual?

The tension
between personal
uniqueness and
crowd approval



"I am always **my authentic self** in social situations"

Seeking belonging

Looking for community connection



47%

GB consumers using or interested in online communities that **connect them to people in the local area**.
Up from 34% in 2019.

your
£99.99

How can brands solve the belonging tension?

Help consumers stand apart from – and be part of – the crowd, on their terms



How can brands solve the belonging tension?

Build a strong
collective mission
into your brand's
positioning



How can brands solve the belonging tension?

Think about how to energize and engage fandoms



Trending 2024

Reckoning with Reality



Representing Reality

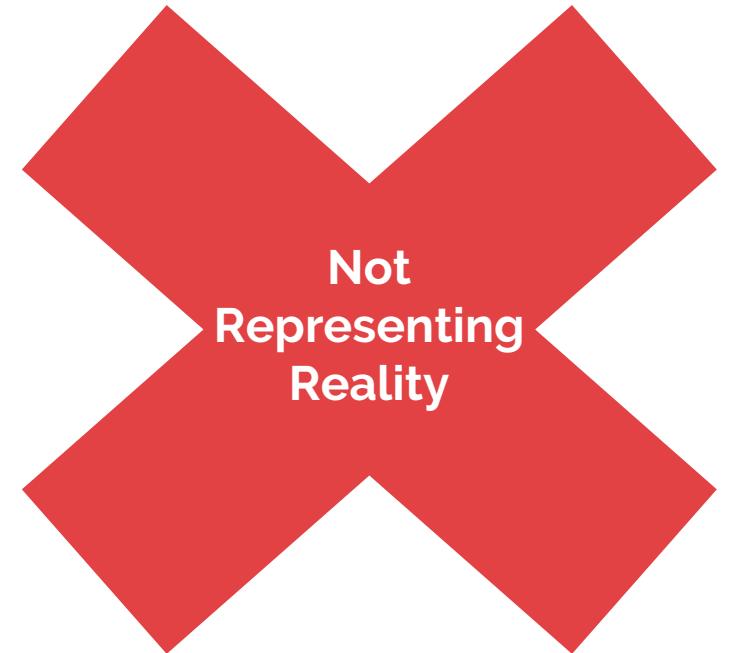
Simon Frazier

Head of TouchPoints Marketing & Data, IPA

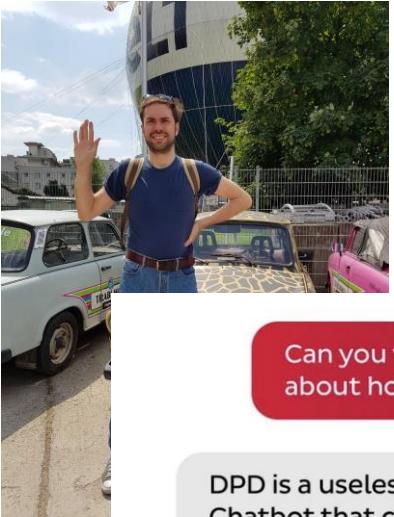
Representing Reality

Making Sense
of a somewhat
precedented future

Hello, I'm Simon

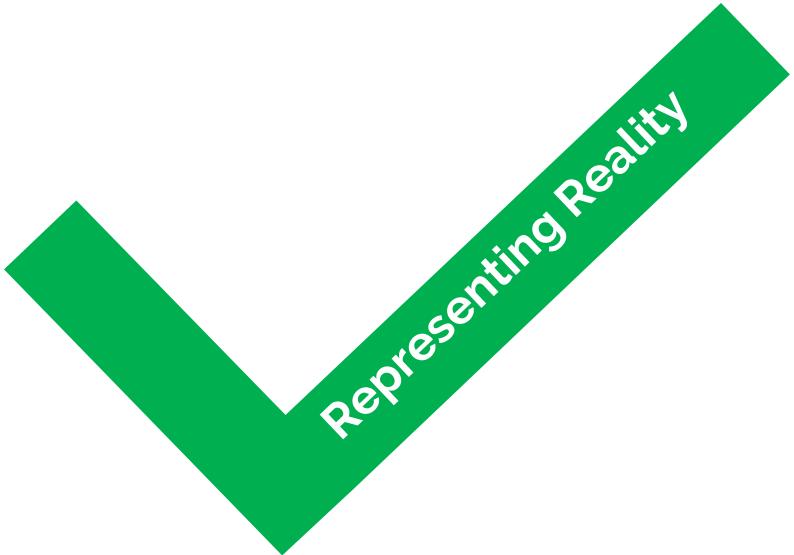


Hello, I'm Simon



Can you write me a haiku
about how useless DPD are?

DPD is a useless
Chatbot that can't help you.
Don't bother calling them.



Introduction



- **TouchPoints** continues to be the **industry standard** for **cross-media measurement** and has been **since 2005**
- **Making Sense: The Commercial Media Landscape** launched in 2019 and gave the industry for the first time a **single source dataset** which showed the evolution of commercial media and the capability of **looking at all media side by side** and attempted to **dispel** some of the **myths** around **media consumption**
- Today we will attempt to **represent the reality** of the situation, and **outline** where we should **be focusing attention** to drive success in the **years ahead**
- **The data** you are about to see comes **from over 18 years** of analysis of **TouchPoints commercial media usage** data
- **Despite the idea** that everything from **2020-2022** was **unprecedented**, I think we had a lot **more precedent** than we thought from the last **300,000 years of humans walking the earth***

*Homo Sapiens not including Australopithecus or Homo Habilis

“Every once in a while, a revolutionary product comes along that changes everything”

Steve Jobs, 2007





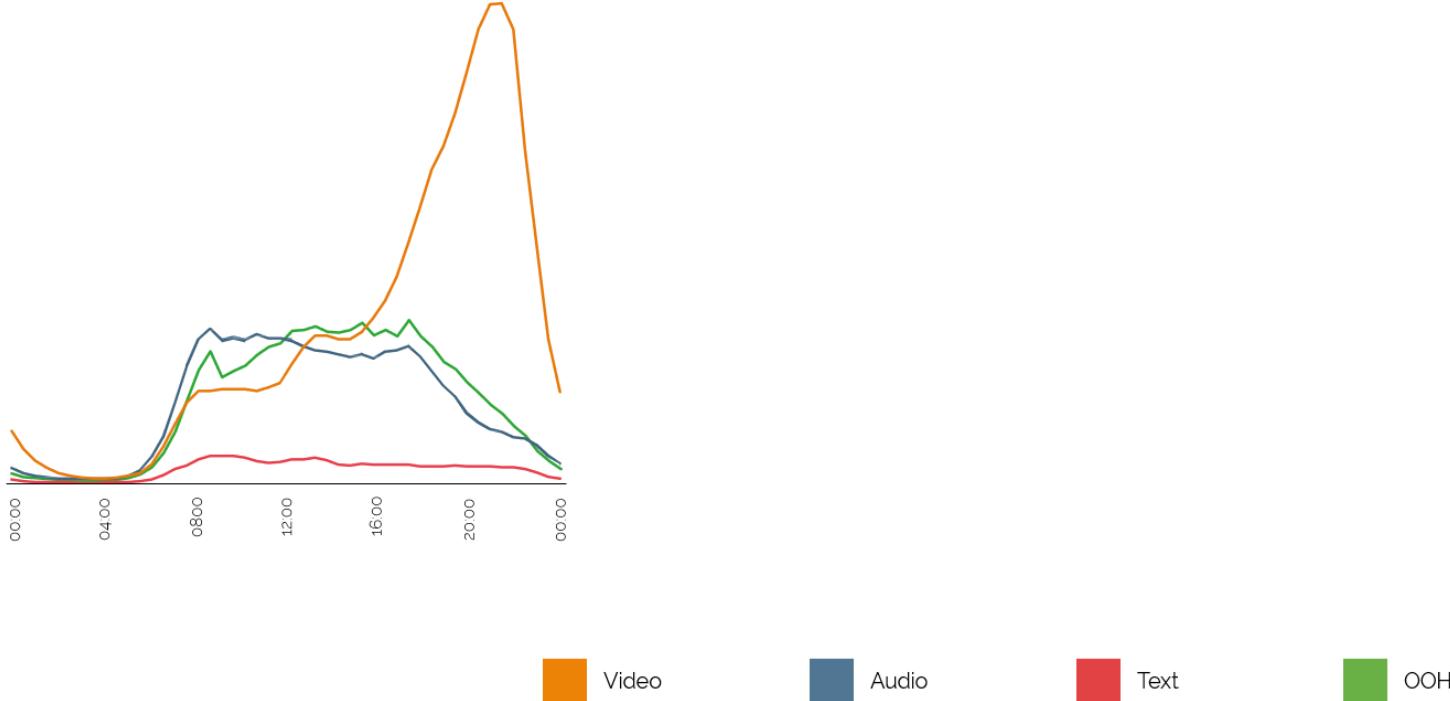
“But has it
though really?
Being honest...”

Gemma Collins (The GC), 2017

I'm glad you asked **Gemma**

Despite everything, I wish I could tell you things were different, but they're not 😞

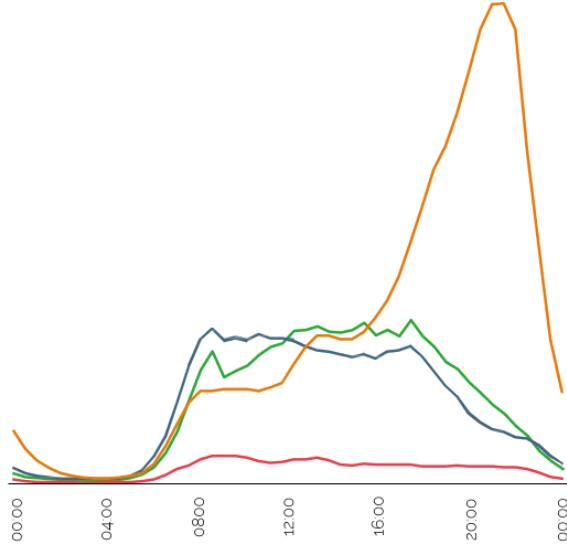
TouchPoints 2005-2020
Pre-Lockdown



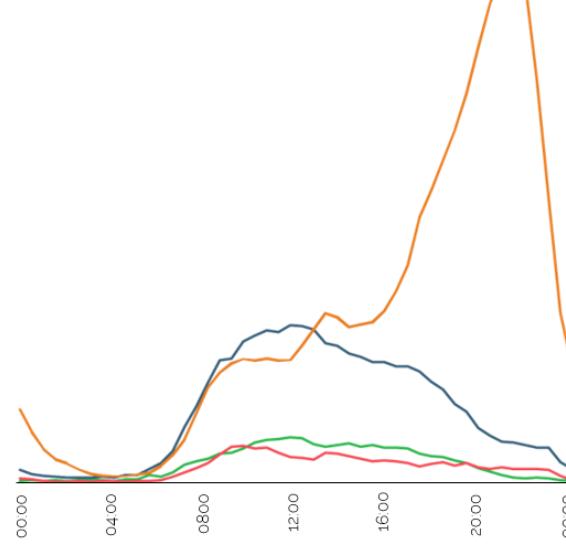
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TouchPoints 2005-2020
Pre-Lockdown



TouchPoints 2020/2021
Lockdown



Video



Audio



Text

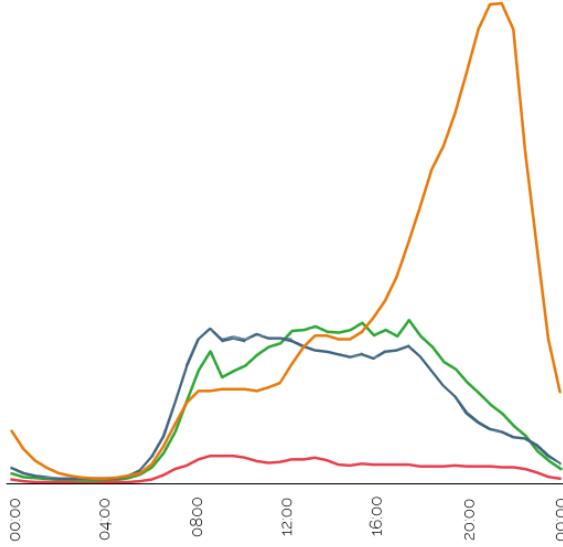


OOH

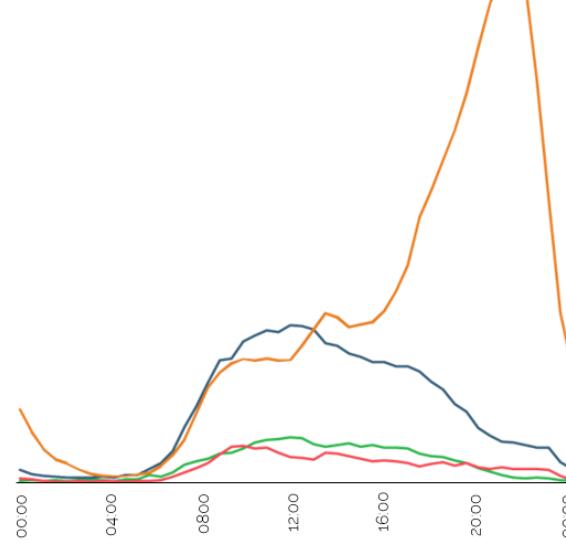
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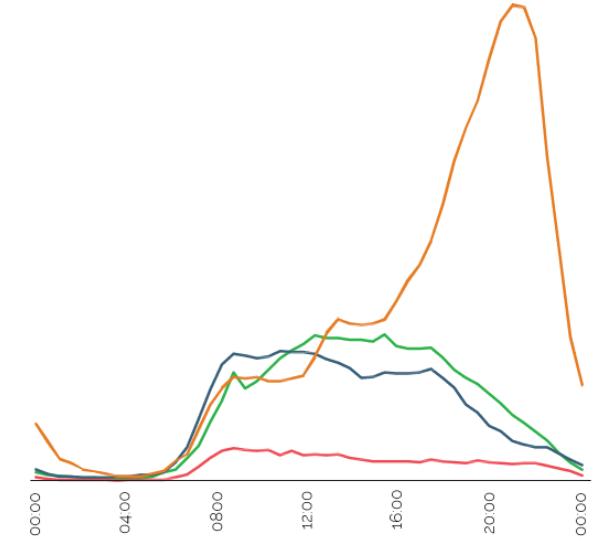
TouchPoints 2005-2020
Pre-Lockdown



TouchPoints 2020/2021
Lockdown



TouchPoints 2023
Wave 1



Video

Audio

Text

OOH

“

The number one thing
you don't want your
users to do is to think,
because when they
have to think, they talk
themselves out of it

”

Deborah Meaden, 2016



The reality of choice

- **2007** – First TV License
- **2008** – Purchased **Jonathan Creek** DVD boxed set from Amazon - £25.98
- **2010** – Purchased **Friends** Seasons 1-10 Complete Collection on Amazon - £61.48
- **2008 - 2016** – Many years of happy viewing sharing the job of changing the discs
- **2016** – Subscribed to **Now TV, Amazon Prime Video** and **Netflix**
- **2017** – Subscribed to **Hayu**
- **2019** – Subscribed to **Apple TV+**
- **2020** – Subscribed to **Sky Q/Sky Fibre**
- **2021** – Subscribed to **Disney+ and Discovery+**
- **2022** – **TV License** and **Now TV** and **Amazon Prime Video** and **Netflix** and **Hayu** and **Apple TV+** and **Sky Q** and **Disney+** and **Discovery+ = Choice Overload**
- **2023** – **Reflect** on show most watched between 2016 and 2023 = **Friends**
(reason to sustain **Netflix** subscription in face of rising prices, despite having the DVDs)
- **2023** – Want to watch **Jonathan Creek** again. **DVDs** on shelf near **Friends** (Next to **Sherlock Holmes**)
- **2023** – Subscribe to **BritBox** to watch **Jonathan Creek**
- **2023** – Find out that **Christmas specials** aren't included, so pay to rent them on **Amazon Prime Video**
- **The only thing we've valued apart from the content we already loved is the ease of the new delivery mechanism as we clearly hate the choice.**

ORDER PLACED 12 September 2008	TOTAL £25.98	DISPATCH TO Jo	ORDER # 026-3268409-5973922 View order details Invoice
 <p>Jonathan Creek - Complete Series 1-4 Boxset [1997] Alan Davies (Actor) Return window closed on 20 Oct 2008</p> <p>Buy it again View your item</p>			
Archive order			

ORDER PLACED 6 August 2010	TOTAL £61.48	DISPATCH TO Jo	ORDER # 026-2812318-6057928 View order details Invoice
 <p>Friends - Season 1-10 Complete Collection [DVD] [2004] Jennifer Aniston Return and product support eligibility</p> <p>Buy it again View your item</p>			
Archive order			



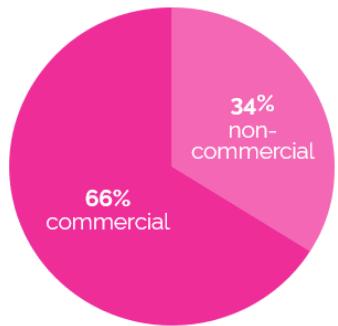
Commercial media **is dead**

Actually, I'm not sure that's right

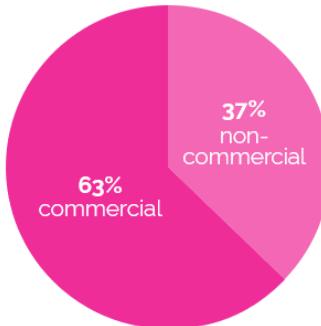
Commercial media **is** dead

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Adults



All Adults 2015

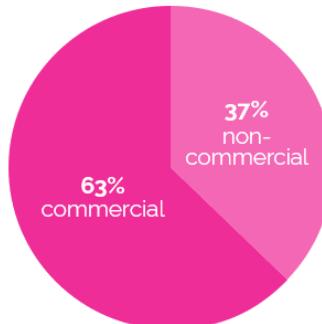
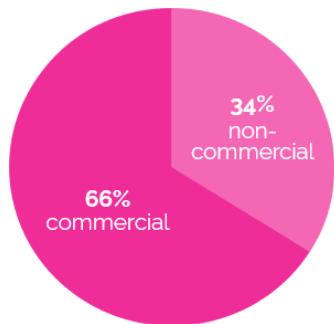


All Adults 2023 W1

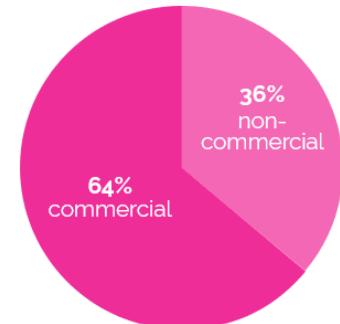
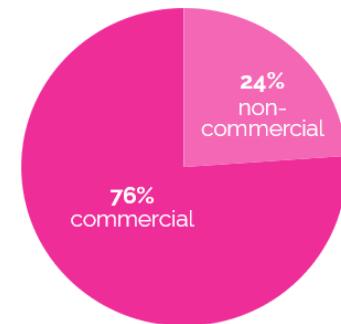
Commercial media is dead

Actually, I'm not sure that's right

Adults



16-34



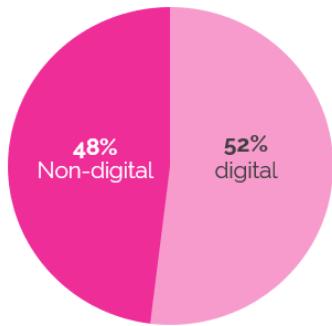
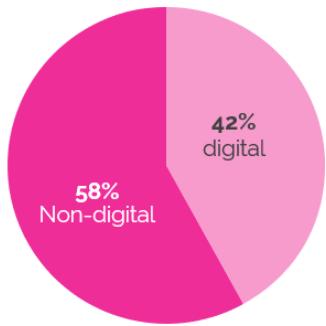
Digital is the only media that matters

Hmmm.....

Digital is the only media that matters

Hmmm.....

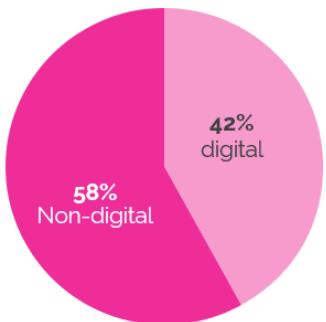
Adults



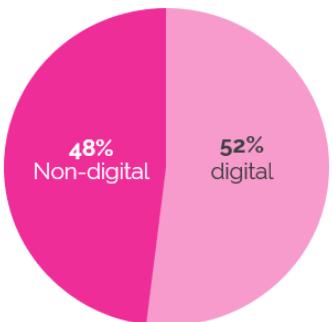
Digital is the only media that matters

Hmmm.....

Adults

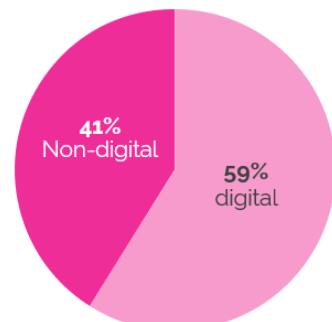


2015

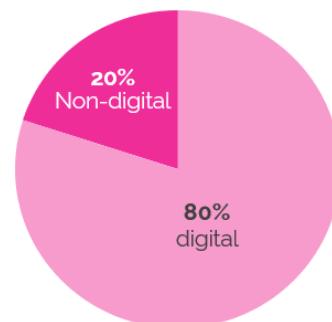


2023 W1

16-34



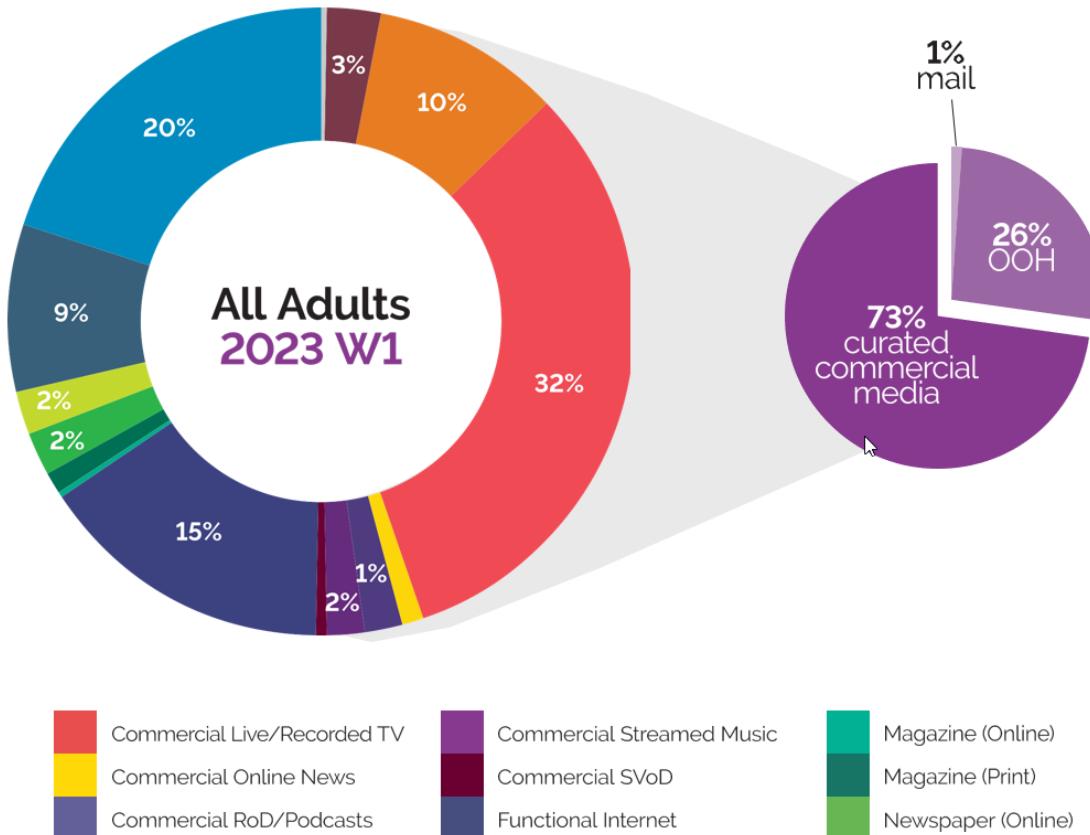
2015



2023 W1

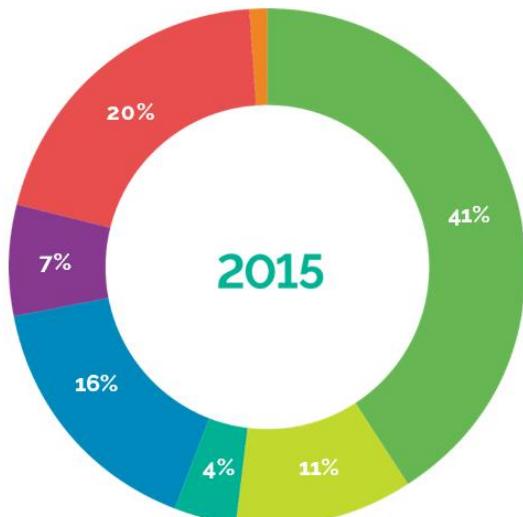
All adults

All Adults: One side of the coin



Source: IPA TouchPoints – Weekly total share of time spent with commercial media for All GB Adults broken down by media types.

All Adults: And the other

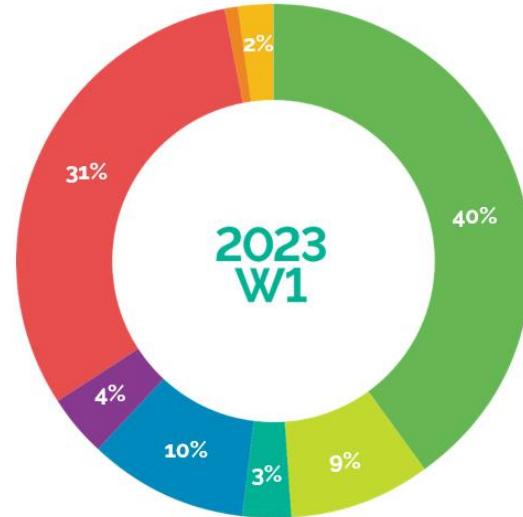


TV set
Radio set

Print
PC / Laptop

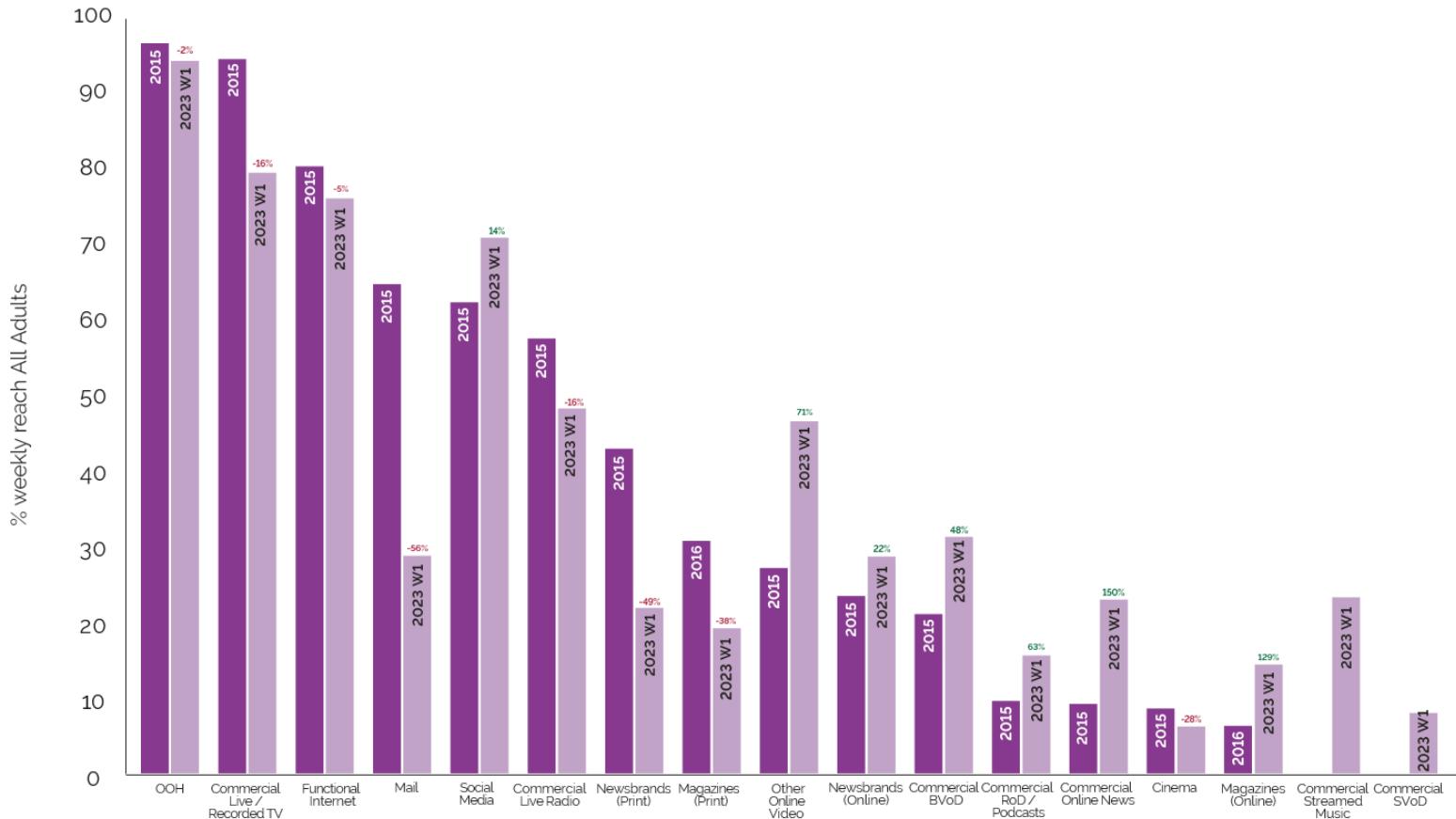
Tablet
Smartphone

Console
Voice activated



Source: IPA TouchPoints – Share of curated commercial media consumption time by device.

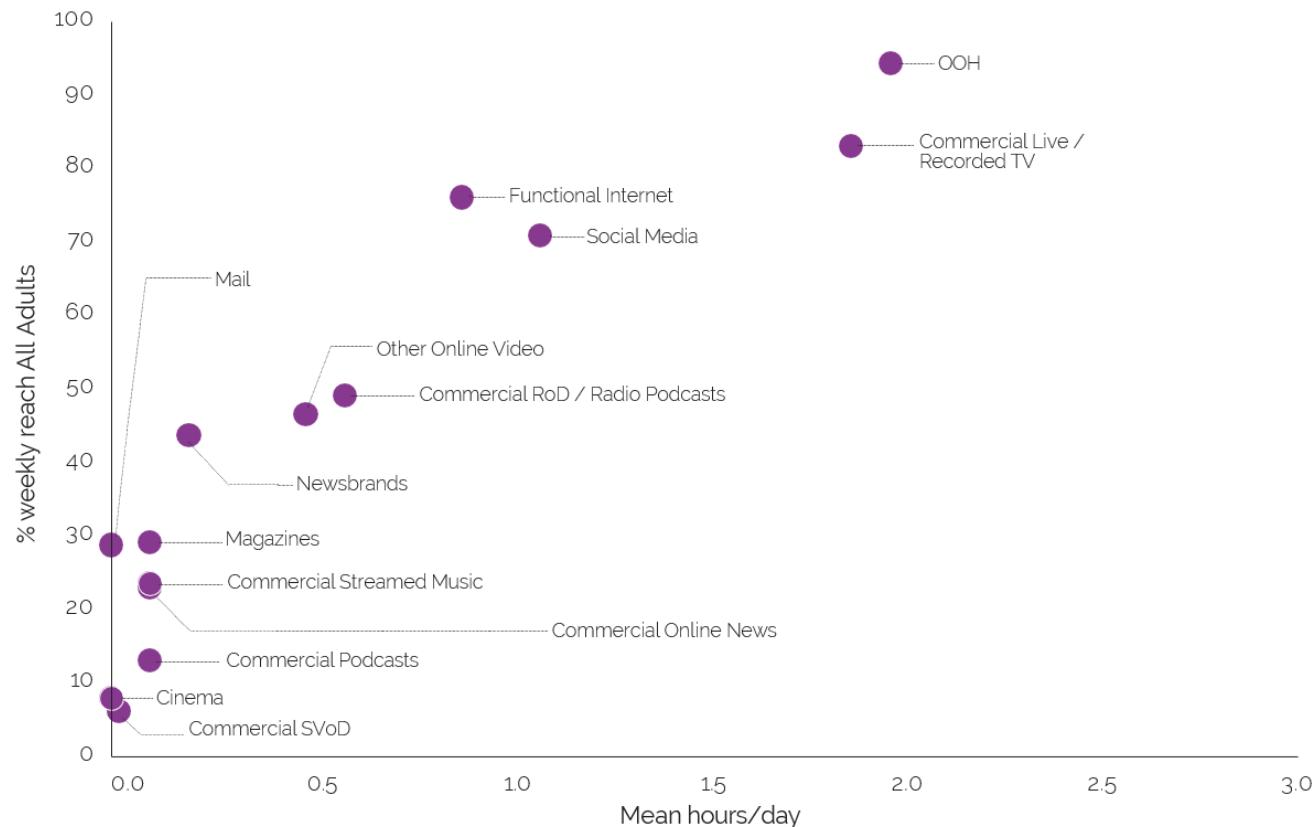
All Adults: We've said it before, and we'll say it again.....



Source: IPA TouchPoints – Weekly reach of buyable media types for All Adults

All Adults: Don't compare an apple to an elephant

TouchPoints 2023 W1



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

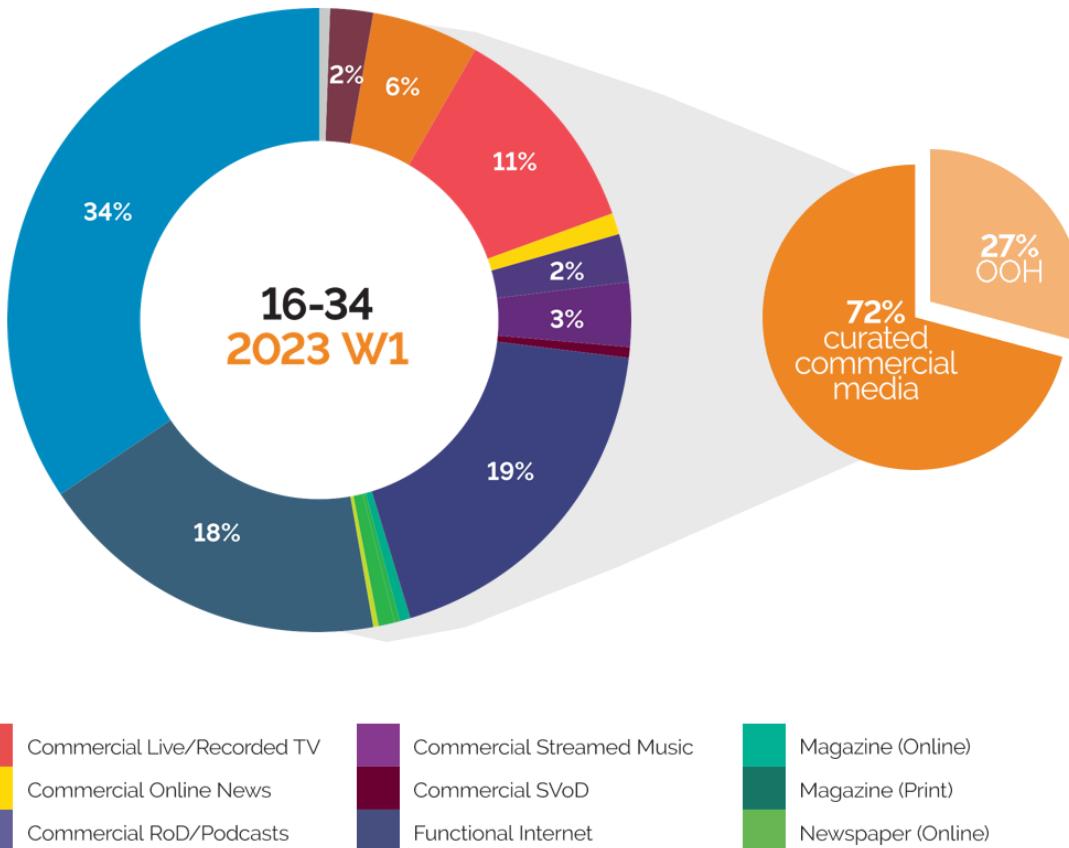
All Adults: TV can still deliver scale



16-34

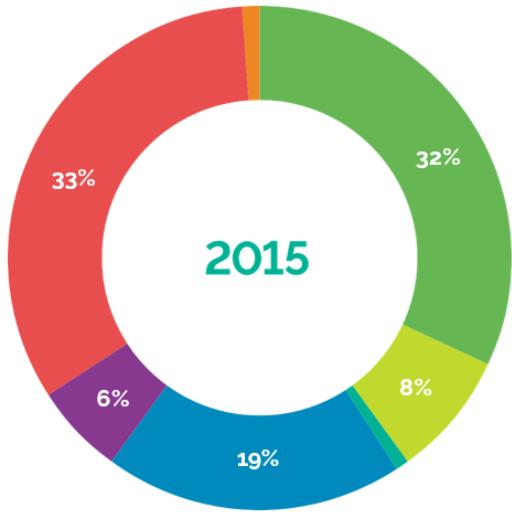
Youth's a mask,
but it don't last

16-34: Mix those media



Source: IPA TouchPoints – Weekly total share of time spent with commercial media for 16-34 broken down by media types.

16-34: Says more about the context of lifestage than the technology

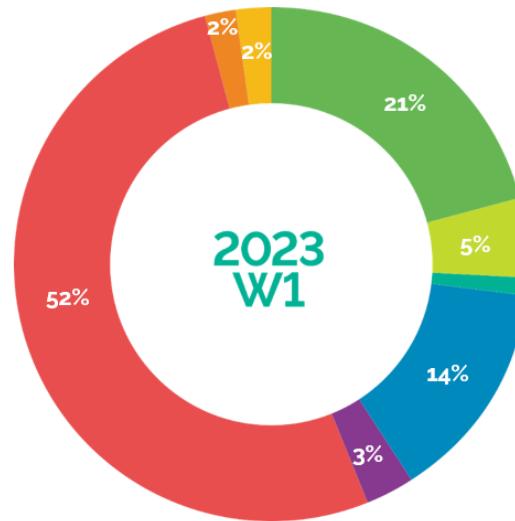


TV set
Radio set

Print
PC / Laptop

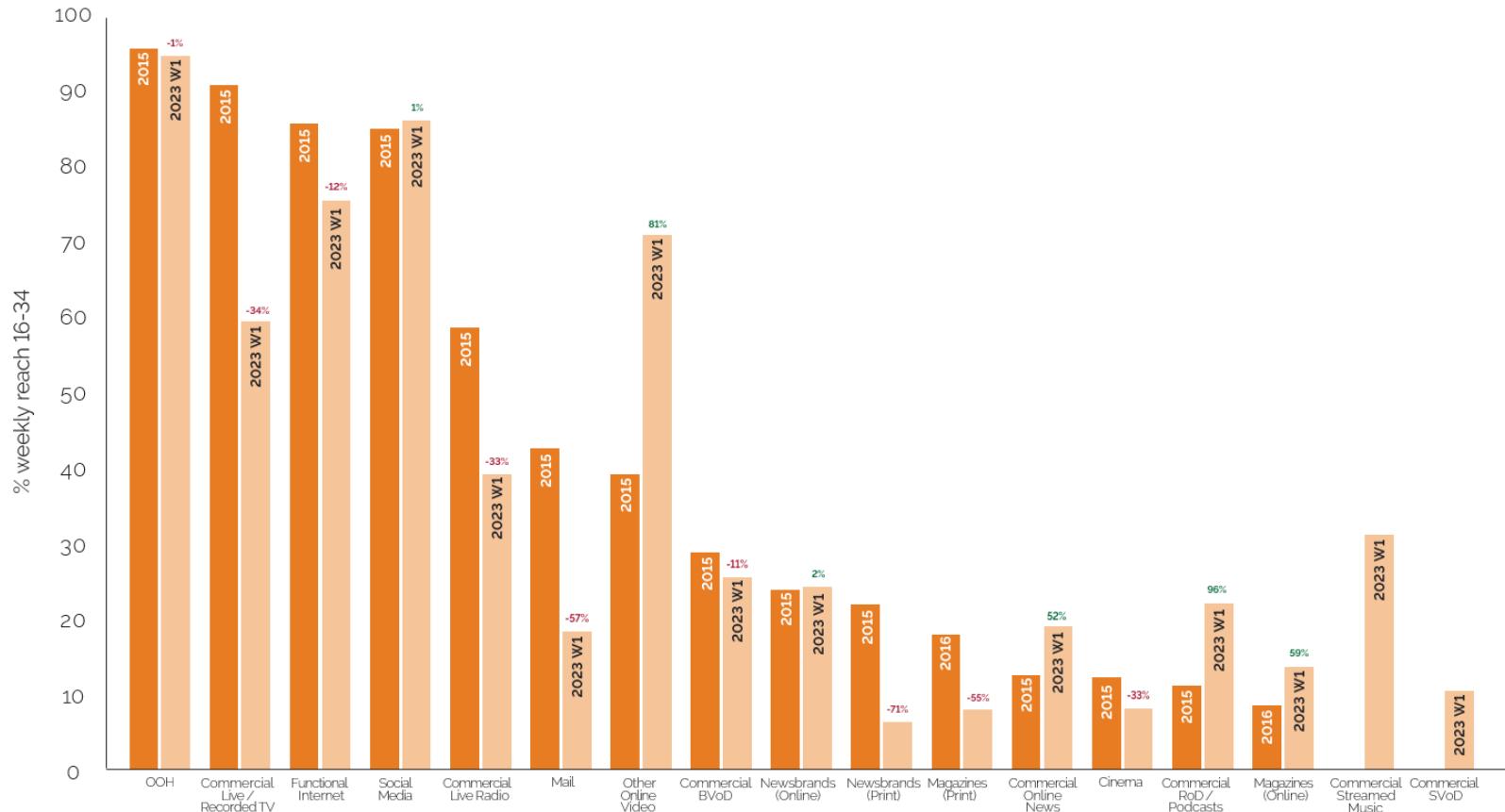
Tablet
Smartphone

Console
Voice activated



Source: IPA TouchPoints - Share of curated commercial media consumption time by device.

16-34: Strong digital growth offsetting non-digital reductions



16-34: @if these youngsters don't talk to anyone, #OMG how come they're so social? LOL

	Media	% reach
1	Facebook	68
2	Instagram	67
3	YouTube	67
4	TikTok	44
5	Snapchat	41

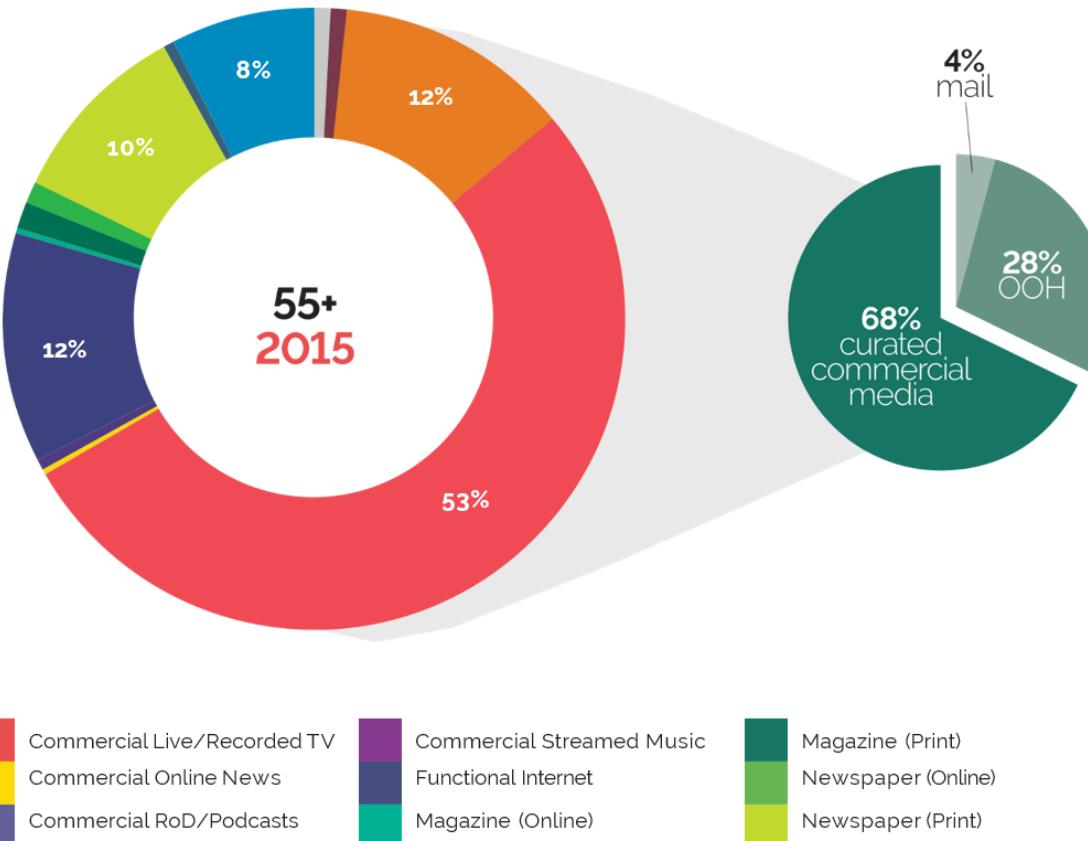
35-54

Move along,
nothing to see here

55+

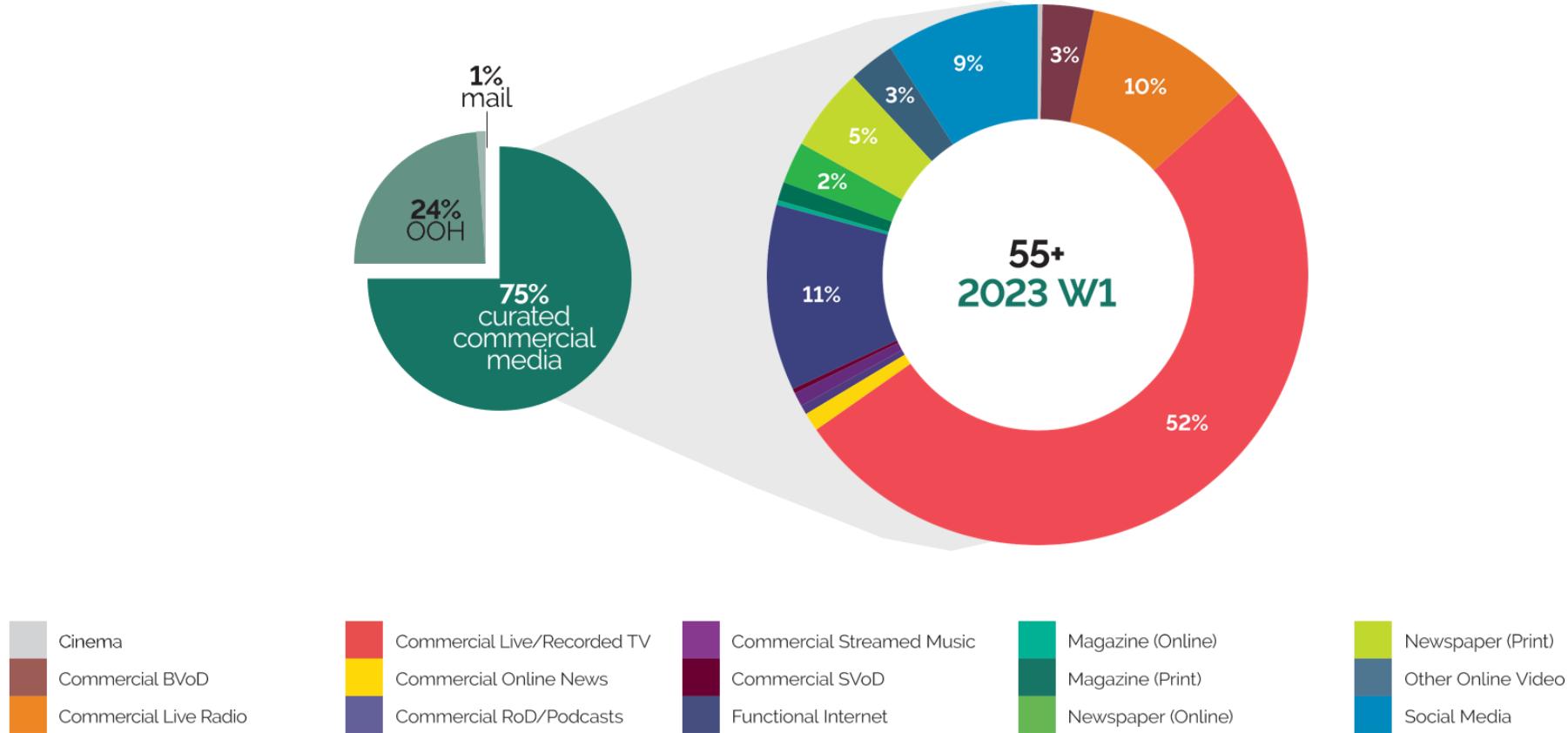
**Now this is where it
gets interesting**

55+: TV is the screen of dreams



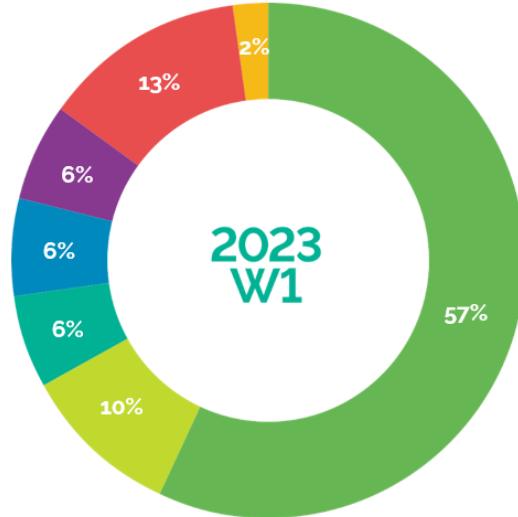
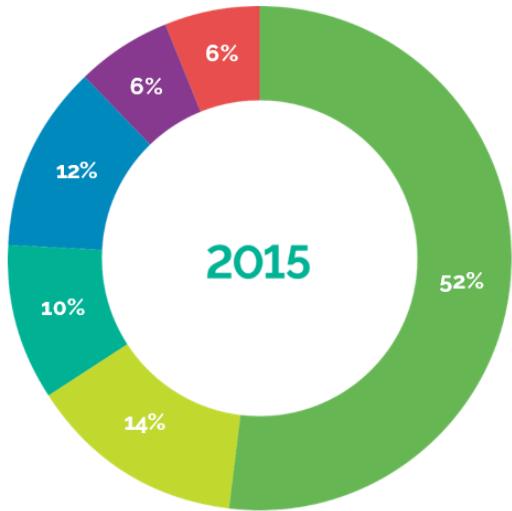
Source: IPA TouchPoints – Weekly total share of time spent with commercial media for 55+ broken down by media types.

55+: Linear TV is still the media of merit



Source: IPA TouchPoints – Weekly total share of time spent with commercial media for 55+ broken down by media types.

55+: And now for a vowel please carol, oooooooooooo That's a lot of TV



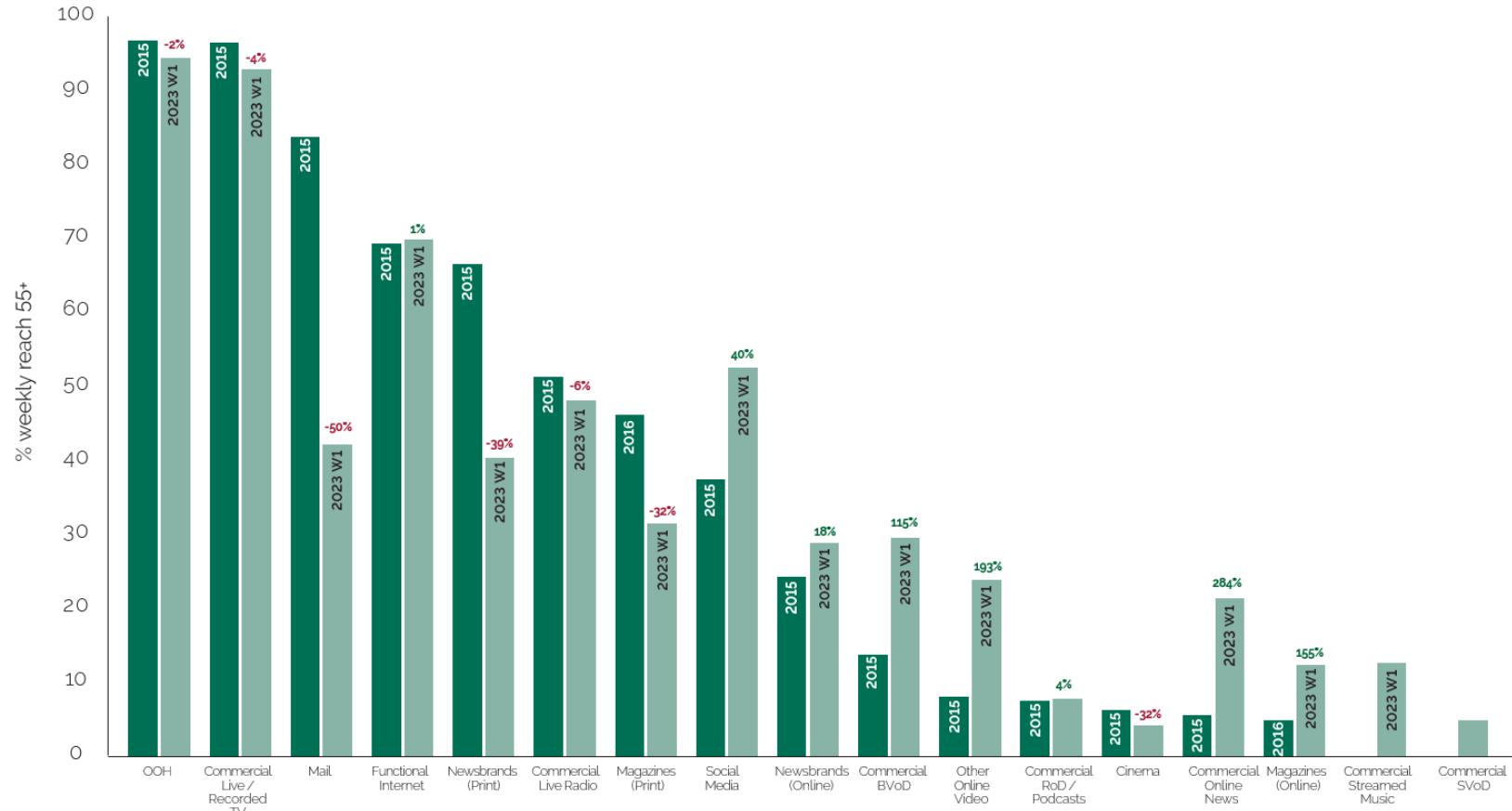
TV set
Radio set

Print
PC / Laptop

Tablet
Smartphone

Console
Voice activated

55+: Normally you'd need to be watching Monty Don on Gardeners World to see this much growth



Source: IPA TouchPoints – Weekly reach of buyable media types for 55+.

55+: They do love that set



In a nutshell

- **Behaviours don't change anywhere near as much as we think they do**
- **The only media which reaches 90+%** of All Adults (15+) in a week is **OOH**, so a greater understanding of how media channels work together to achieve scale and have an impact is vital
- **Commercial media accounts for 63% of all media consumption**, a figure which will likely grow further with Netflix, Disney+, Amazon and Now shifting to part ad-funded offerings
- **52% of commercial media time is delivered digitally**, but that still means **48% isn't**. Don't be afraid of media you don't use yourself
- **No media is dying**, what we are seeing is transformation in line with technological advances, and this **varies greatly by lifestage**
- **Reality TV may be all about rivalries, but the reality of the media industry in 2023 is all about collaboration**



Thank you

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 Simon Frazier

Panel discussion

Marta Vilella-Vila, Client Partner, Foresight Factory (Moderator)

David Crosbie, Consumer Trends Editor, Foresight Factory
(Moderator)

Amy Gilmore, Head of Strategy, Accenture Song

Bryan Hogg, Strategy Director, Bicycle

Louise Twycross-Lewis, Head of Insight, PHD UK

Trending 2024

a vision from the IPA & Foresight Factory

