

# Making sense Of the commercial media landscape in 2025



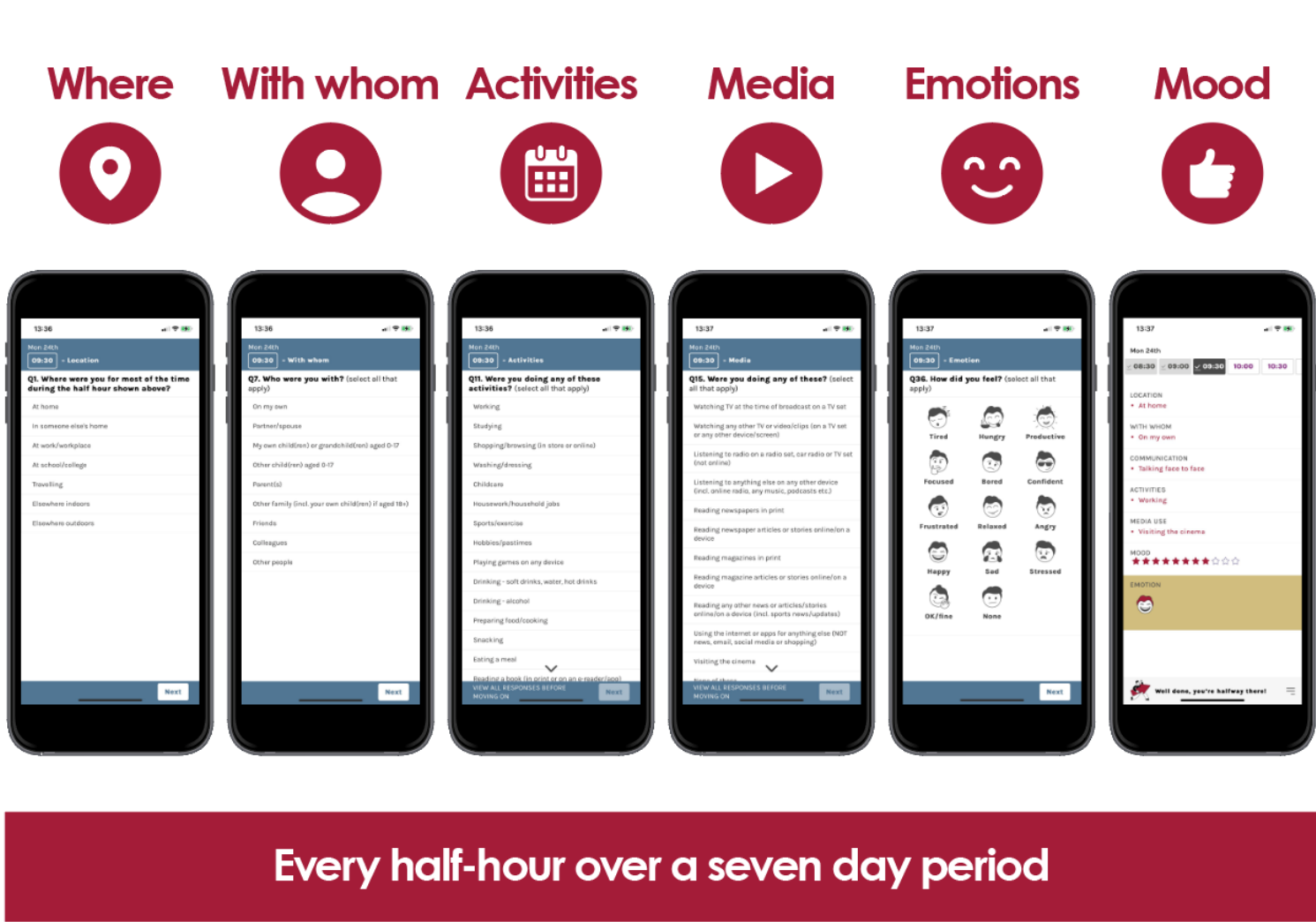
[ipa.co.uk/makingsense](https://ipa.co.uk/makingsense)

**So how does it  
all work?**

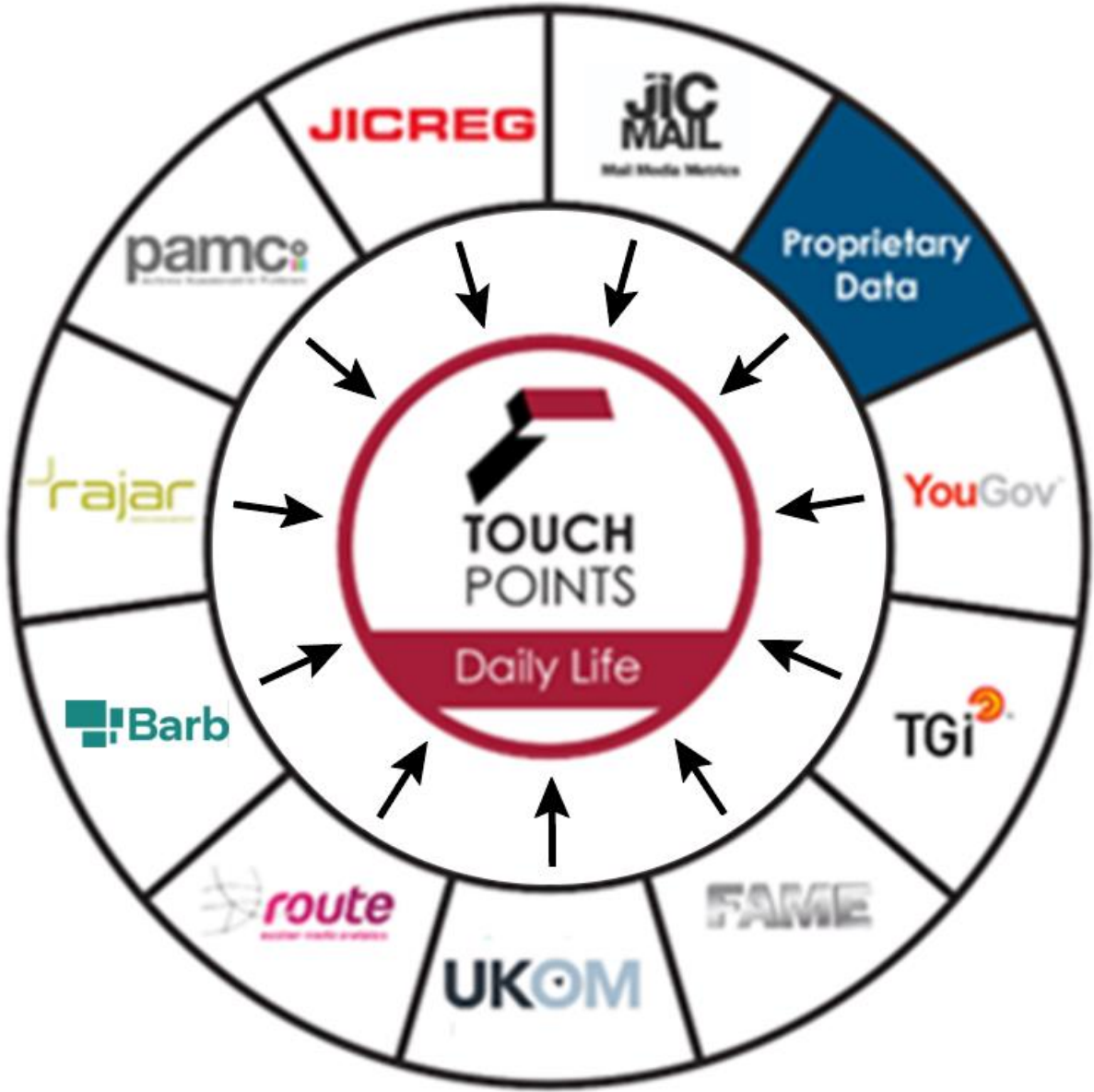


# TouchPoints: designed as a multimedia planning tool

6,000 Adults (15+)

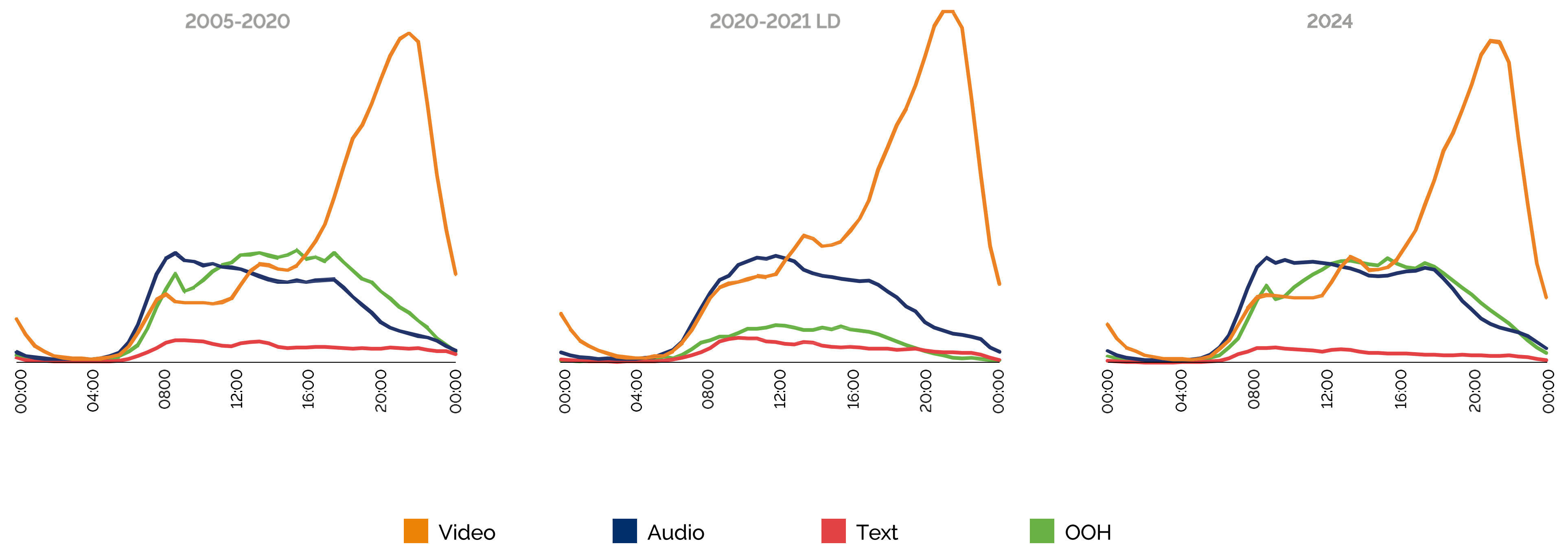


Daily Life Survey
























Channel Planner

# The key takeaway: Despite mass innovation humans are creatures of habit



Source: IPA TouchPoints, The patterns of video, audio text and OOH consumption across an average day.

The patterns are the same, the platforms are all different and without unified measurement it's a tough landscape

1995	2005	2015	2025	
				
				
				
				
				
				

✓ - Platform contains advertising in lowest open or subscription tier

**We'll get to the media  
landscape shortly...**

...but first we need a bit  
of background context



# Let's talk about The Long and the Short of It



## The Long and the Short of It


Balancing Short and Long-Term Marketing Strategies

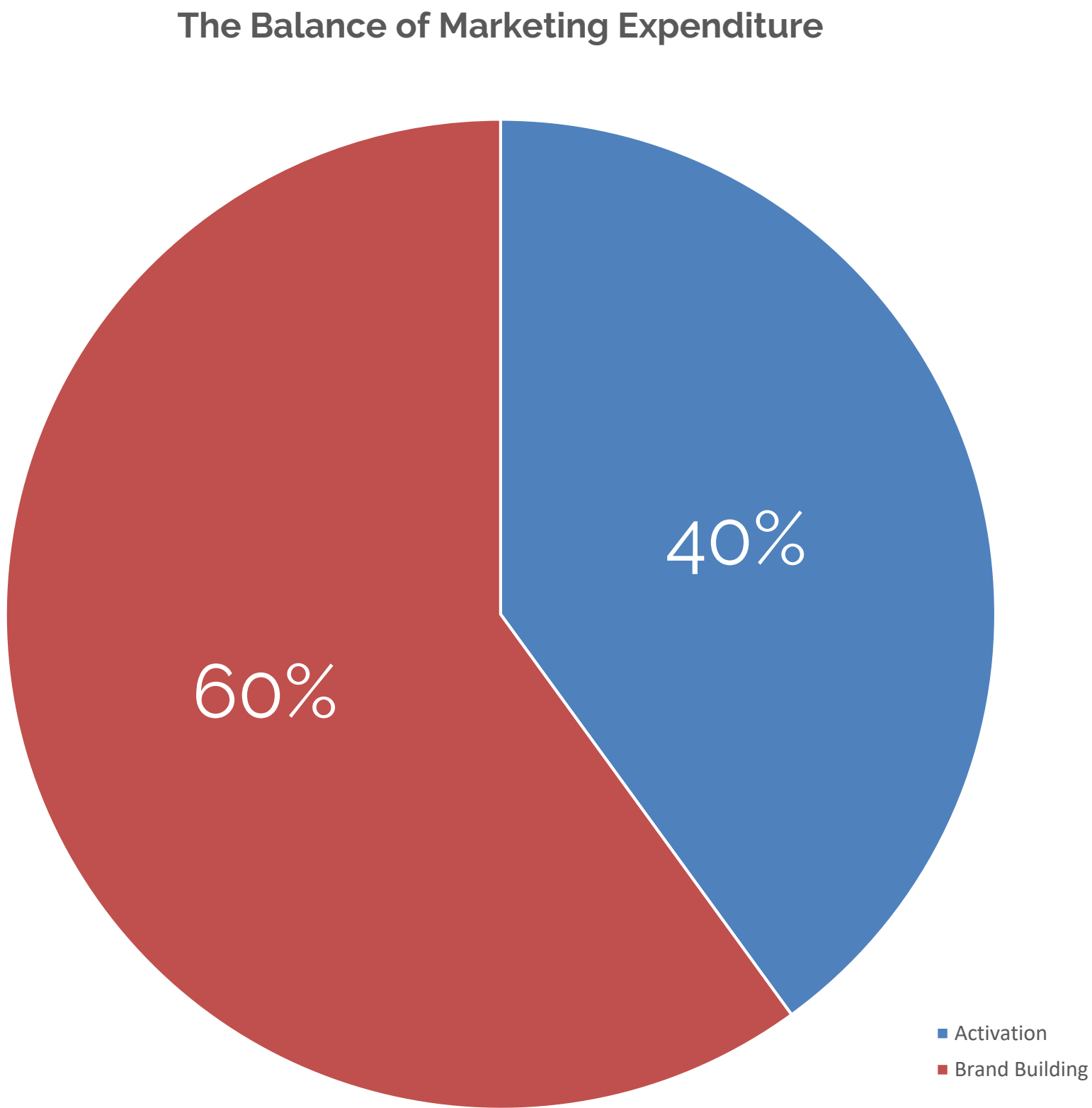
Les Binet, Head of Effectiveness, adam&eve DDB

Peter Field, Marketing Consultant



In association with





# Where it all gets confusing



What is this?

amazon.co.uk

All

hoover

Results

Check each product page for other buying options. Price and other details may vary based on product size and colour.

**Amazon Basics**  
2-in-1 Corded Upright Vacuum Cleaner, ECO Motor, HEPA filtration, Lightweight Stick, Black  
★★★★☆ 2,751  
3K+ bought in past month  
£29<sup>99</sup>  
FREE delivery Thu, 17 Apr on your first eligible order to UK or Ireland  
Or fastest delivery Wed, 16 Apr  
[Add to basket](#)

**Shark**  
Corded Upright Vacuum Cleaner 1.1L with Lift-Away Technology, Pet Model, LED Headlights, Anti-Allergen, 8m Cord, 750W, Pet, Crevice & Multi-Surface Tools, Red/Black, NV602UKT  
★★★★☆ 18,985  
1K+ bought in past month  
£138<sup>54</sup> RRP: £229.99  
✓prime  
FREE delivery Thu, 17 Apr  
Or fastest delivery Wed, 16 Apr  
[Add to basket](#)

**Vax**  
Mach Air Upright Vacuum Cleaner; High performance, Multi-cyclonic, with No Loss of Suction; Lightweight - UCA1GEV1, 1.5 Litre, 820W, Purple  
★★★★☆ 10,600  
3K+ bought in past month  
£79<sup>00</sup> RRP: £99.99  
✓prime  
FREE delivery Thu, 17 Apr  
Or fastest delivery Tomorrow, 15 Apr  
Small Business  
[Add to basket](#)  
More buying choices  
£75.84 (9+ used & new offers)

**Syntecno**  
Cordless Vacuum Cleaner Stick Vacuums - Electric Brooms Powerful Lightweight Vacuum Cleaners Upright Handheld Rechargeable Lithium-Ion Battery Wireless for Home Hardwood Floor Carpets Car  
★★★★☆ 11,260  
1K+ bought in past month  
£79<sup>99</sup>  
✓prime  
FREE delivery Thu, 17 Apr  
Or fastest delivery Tomorrow, 15 Apr  
[Add to basket](#)

**VYTRONIX**  
3-in-1 Cordless Vacuum Cleaner 22.2V | Powerful & Lightweight | 40 Minute Run Time | Rechargeable Lithium-Ion Battery | Great for Pet Hair Carpets & Hard Floors | Upright Handheld Stick  
★★★★☆ 198  
1K+ bought in past month  
£64<sup>99</sup>  
✓prime  
FREE delivery Thu, 17 Apr  
Or fastest delivery Tomorrow, 15 Apr  
[Add to basket](#)



All

henry

Henry Hoover by vacuum type

Bagged

Bagless

Corded

Cordless

henry hoover

henry hoover bags

henry hoover attachments

henry hoover head

henry hoover hose

henry hoover parts

# And the numbers don't seem to add up

			0
			Totals
0	Totals	%Col	100.0
1	Dyson	%Col	14.7
2	Shark	%Col	10.1
3	Other	%Col	9.2
4	Vax	%Col	5.3
5	Hoover	%Col	4.4



£13.1m



£3.2m



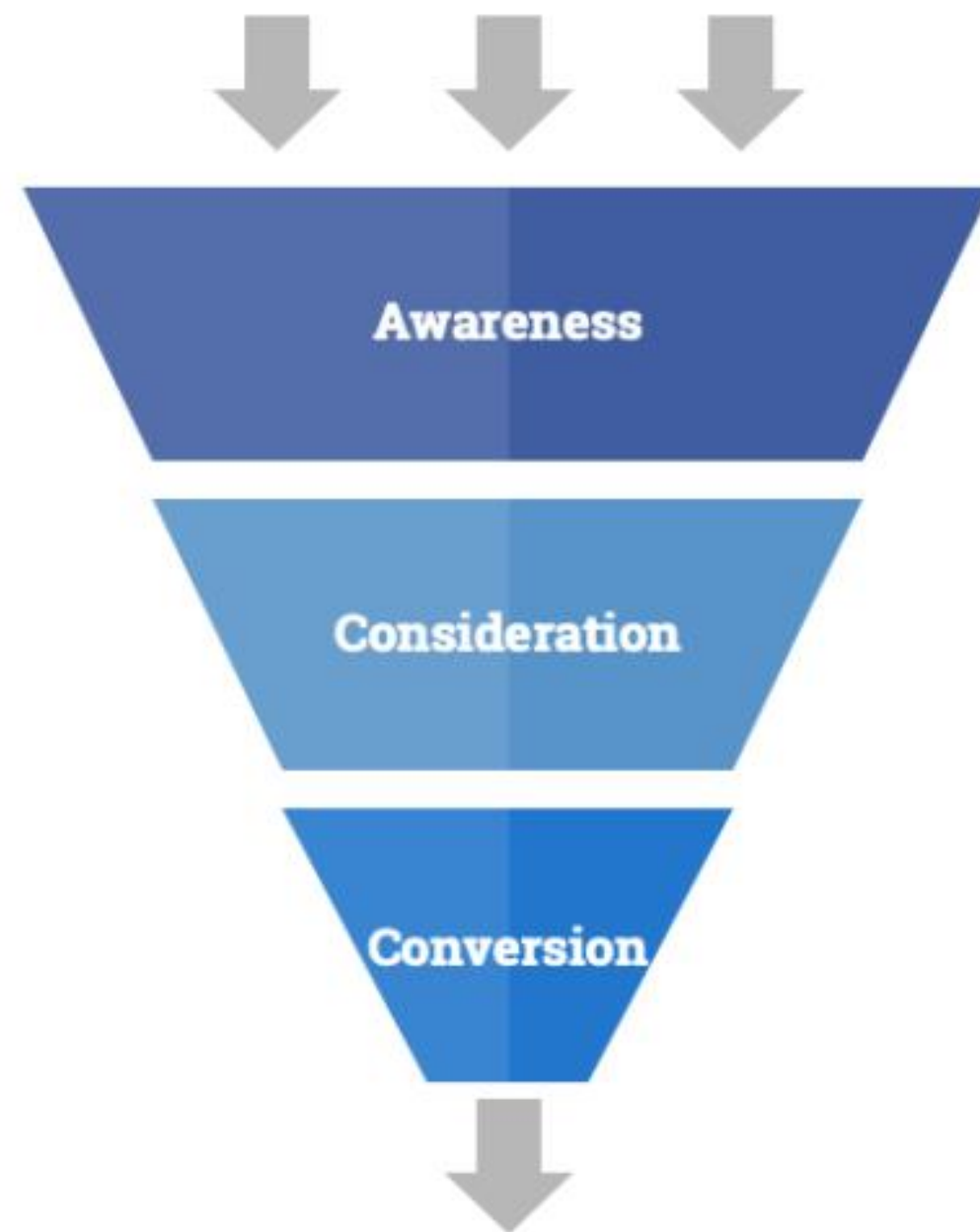
£656k



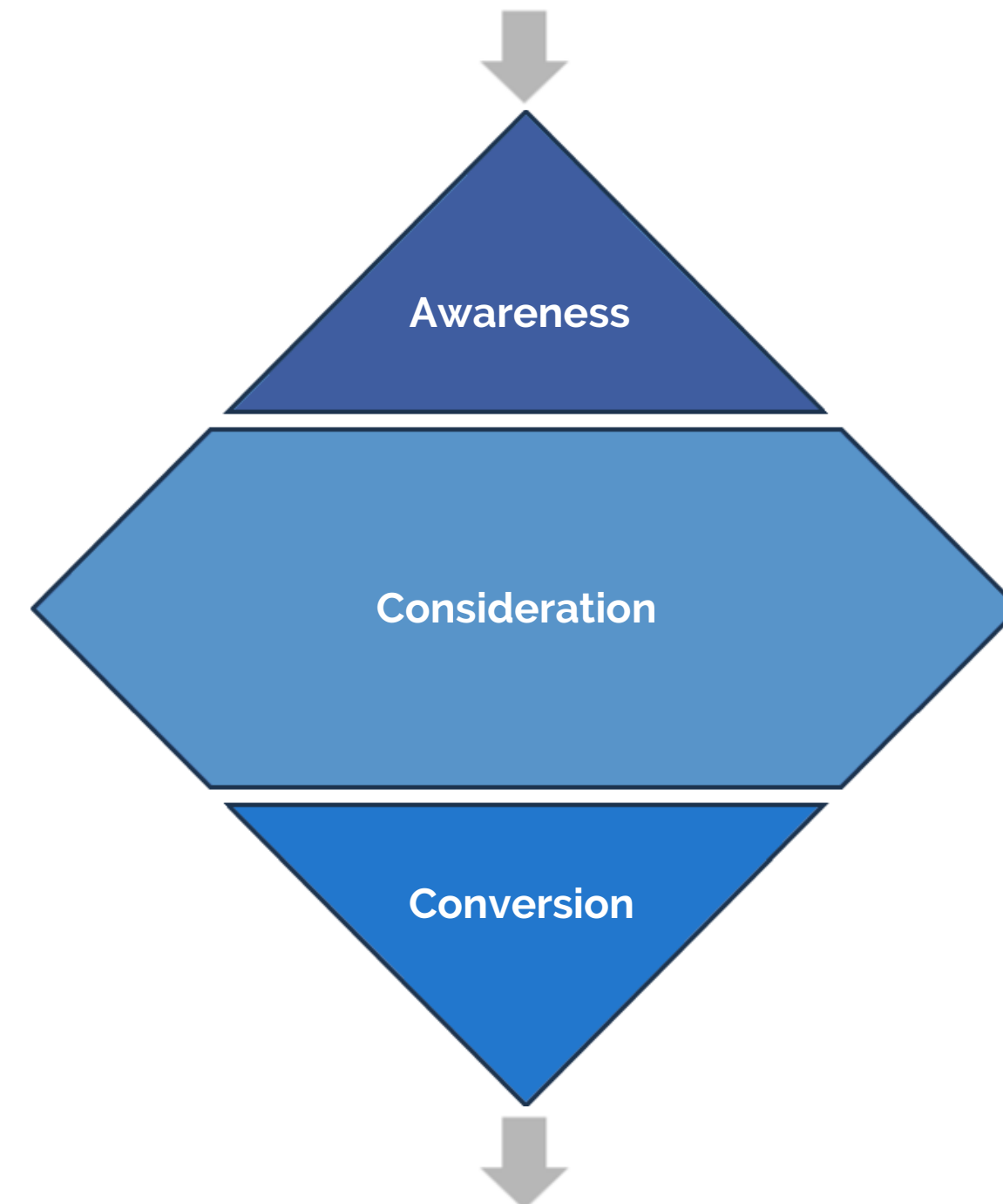
£0

# What if we've been getting it all wrong?

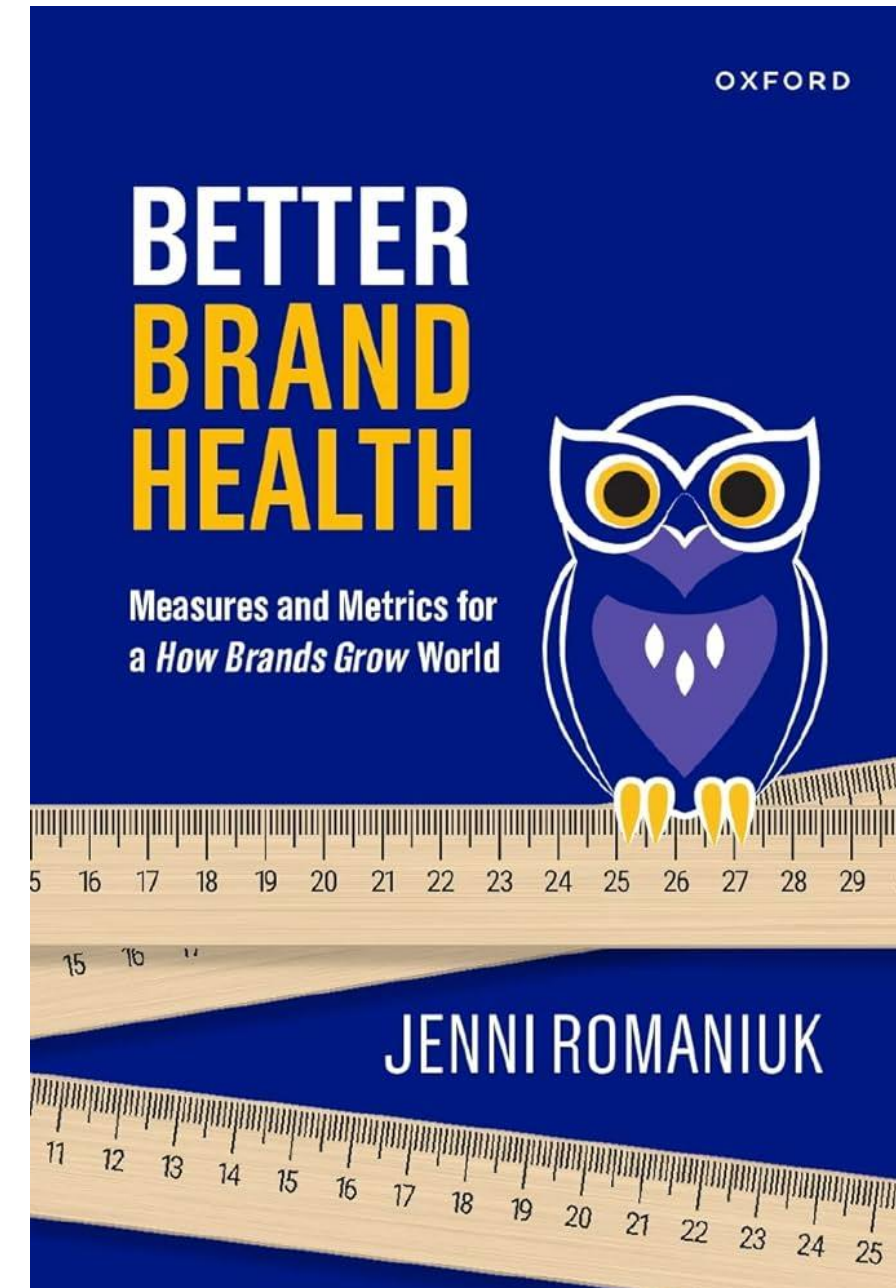
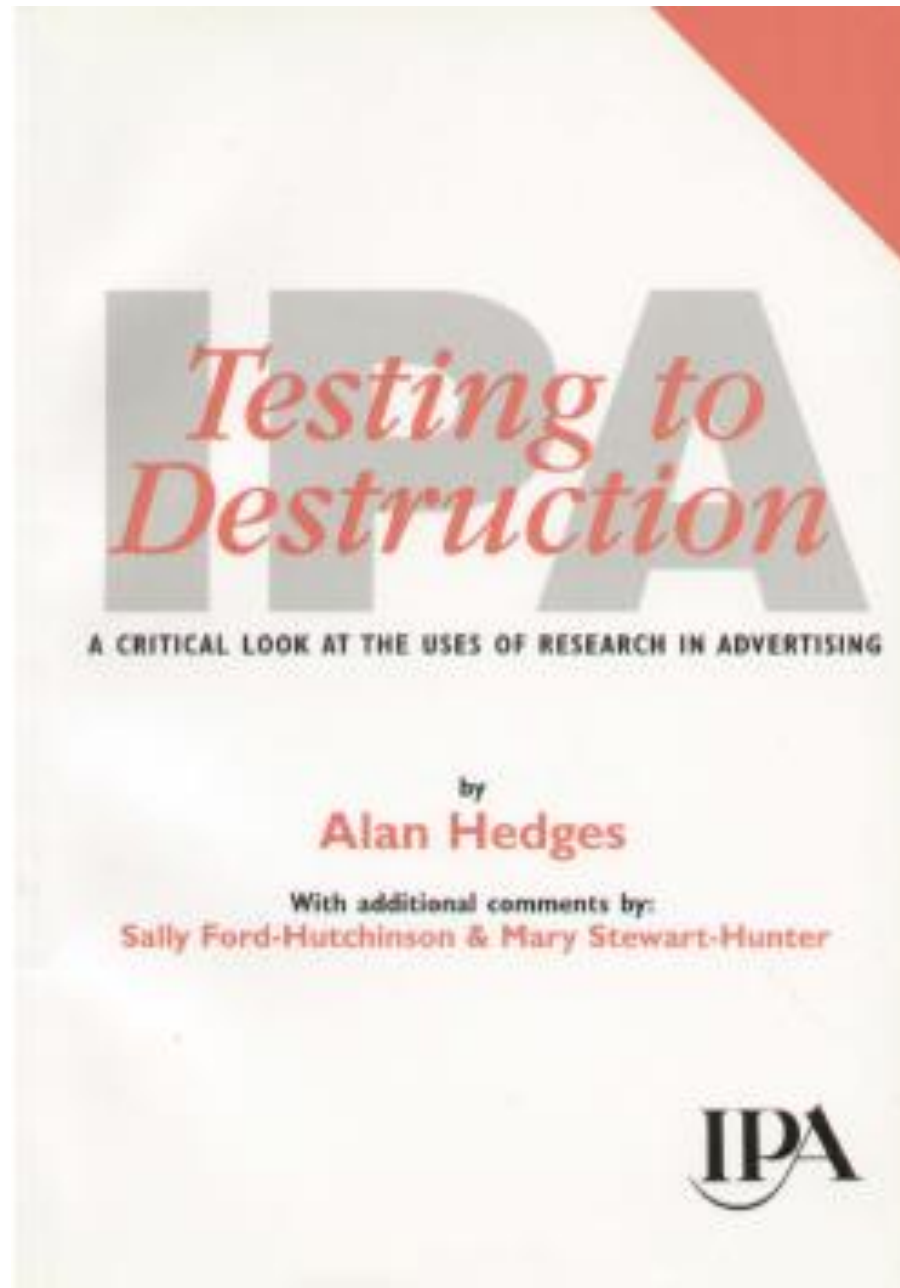
## Forget the Funnel



## Design for the Diamond



# Why tapping into consideration is the missed metric







I know you're all tired  
but bear with me



# How advertising theoretically works



# How advertising really works

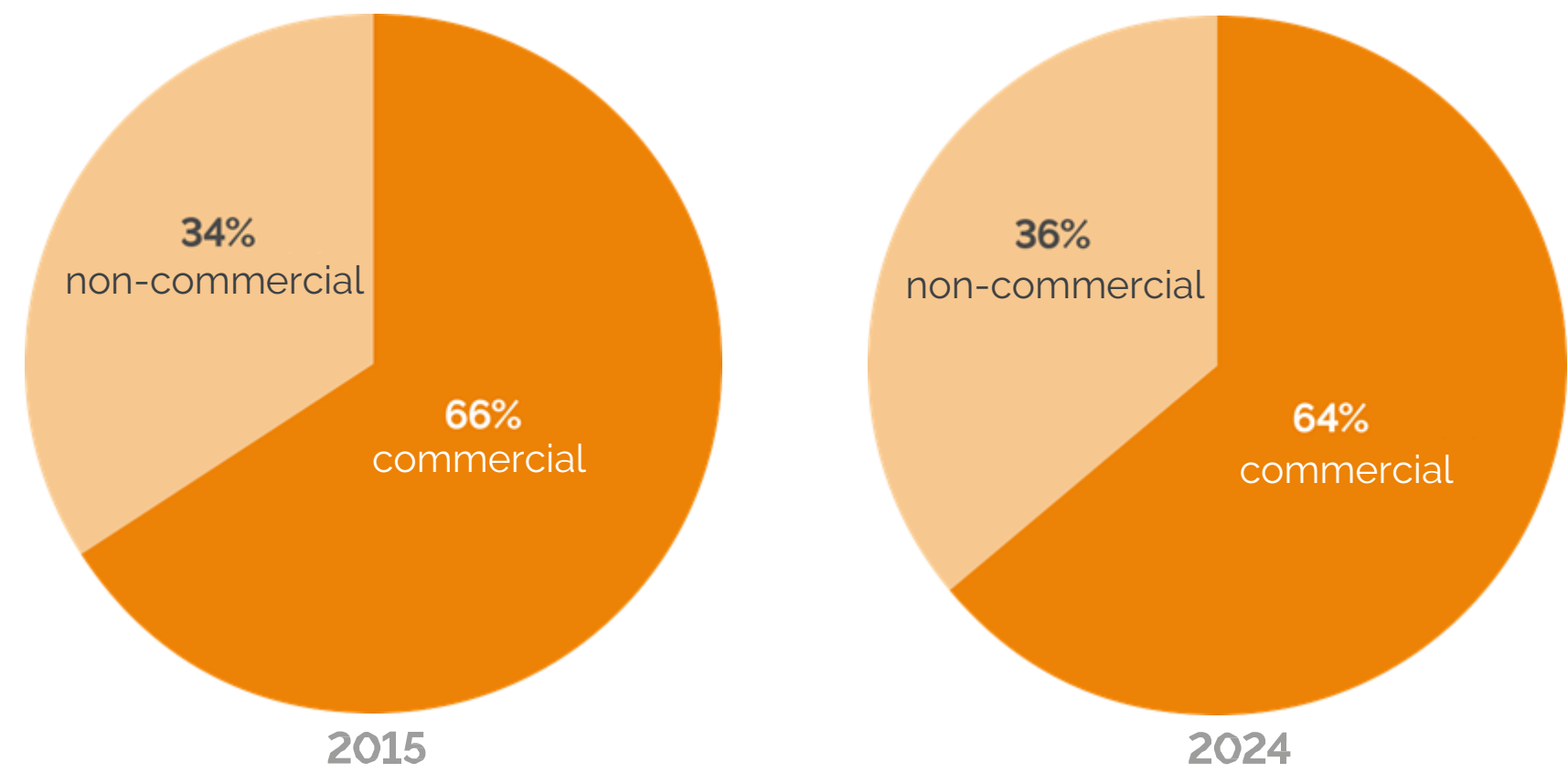


**The broad  
commercial media  
landscape today**

# Back in 2015, I worried that commercial media was dying

In 2025 it turns out I was wrong...

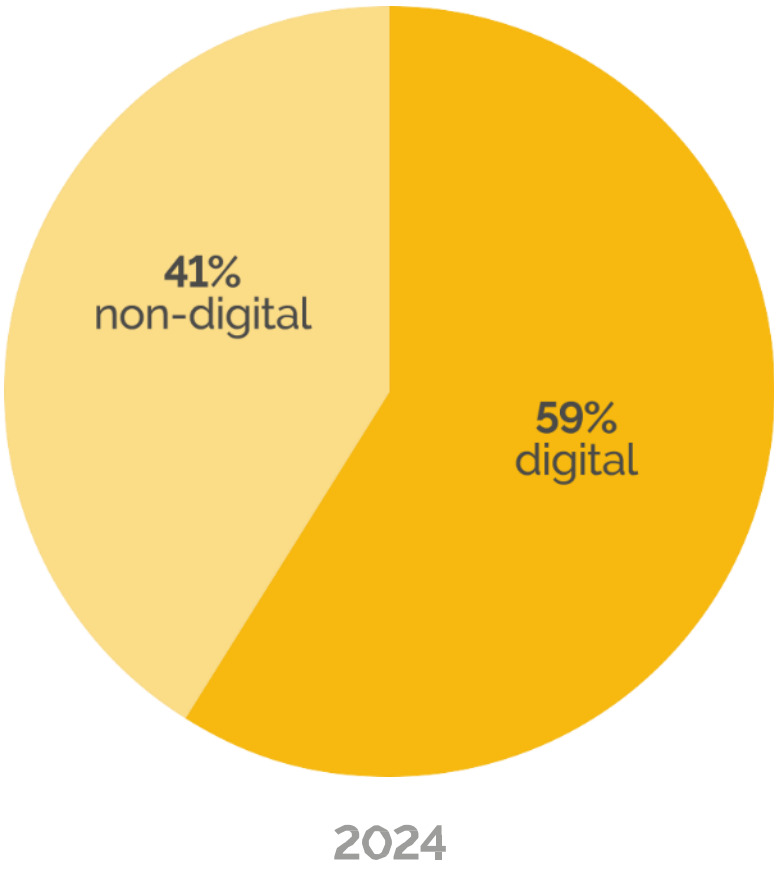
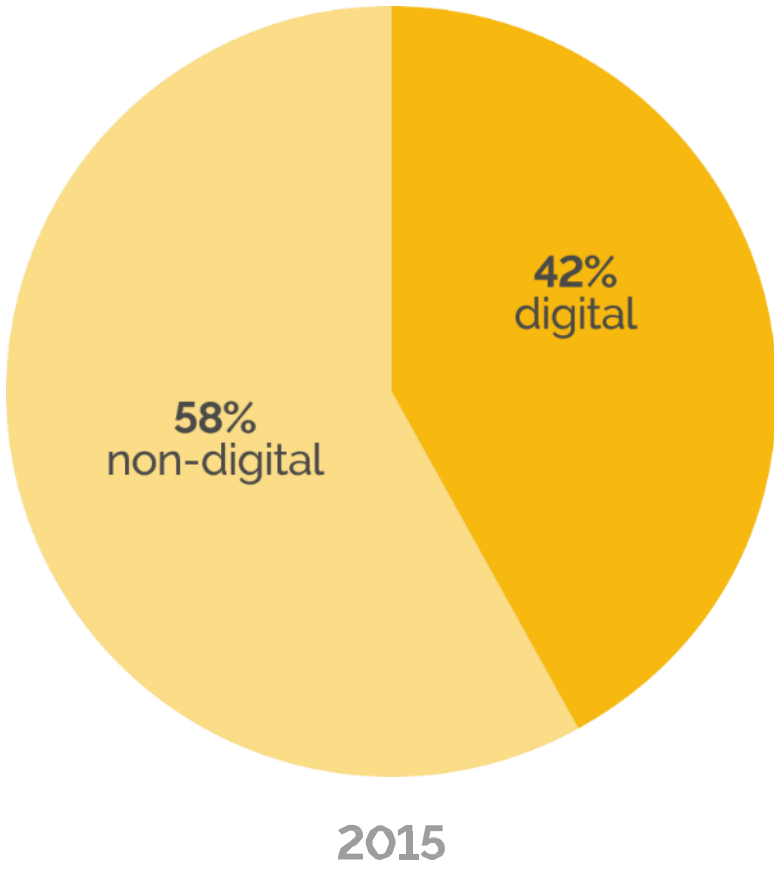
All Adults curated media time share



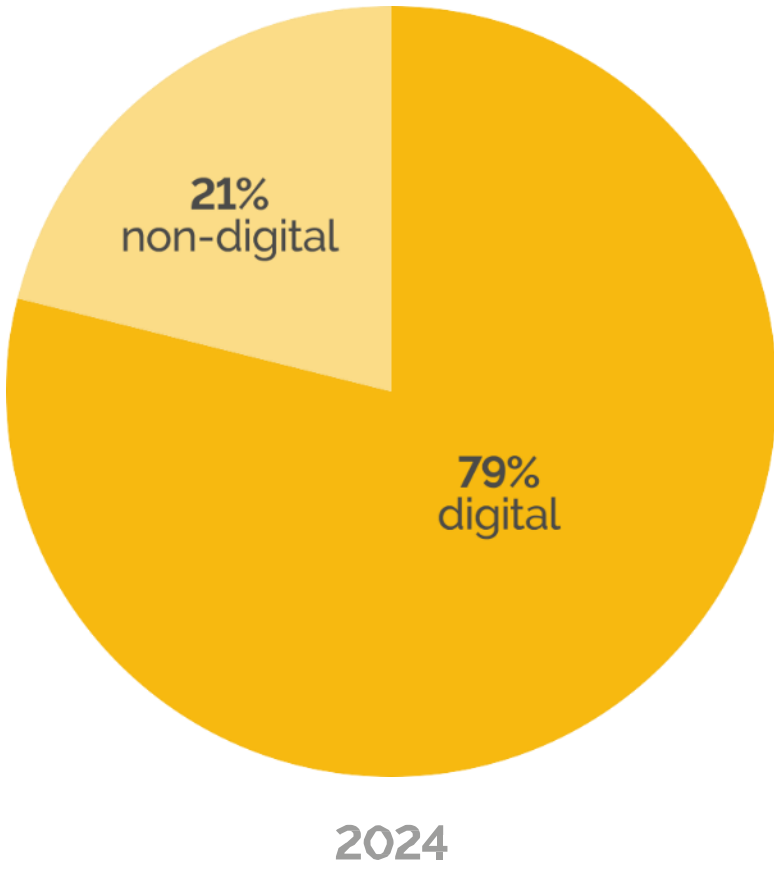
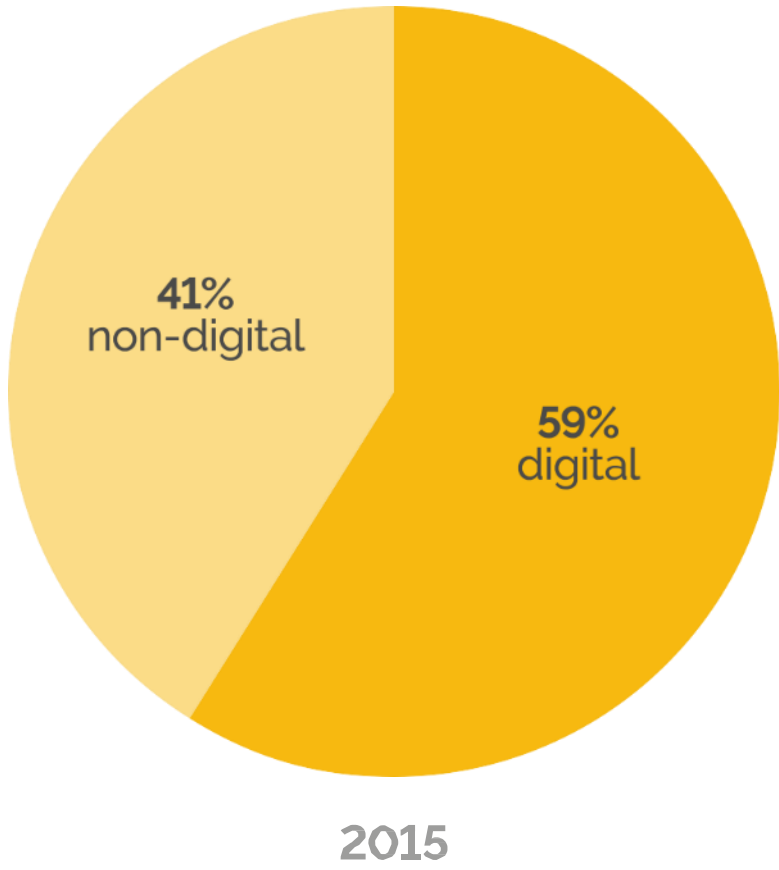
Source: IPA TouchPoints – Share of curated media by commercial and non-commercial split for GB adults and 16-34.

# Is digitalisation really a big deal?

All Adults commercial media time share



16-34s commercial media time share

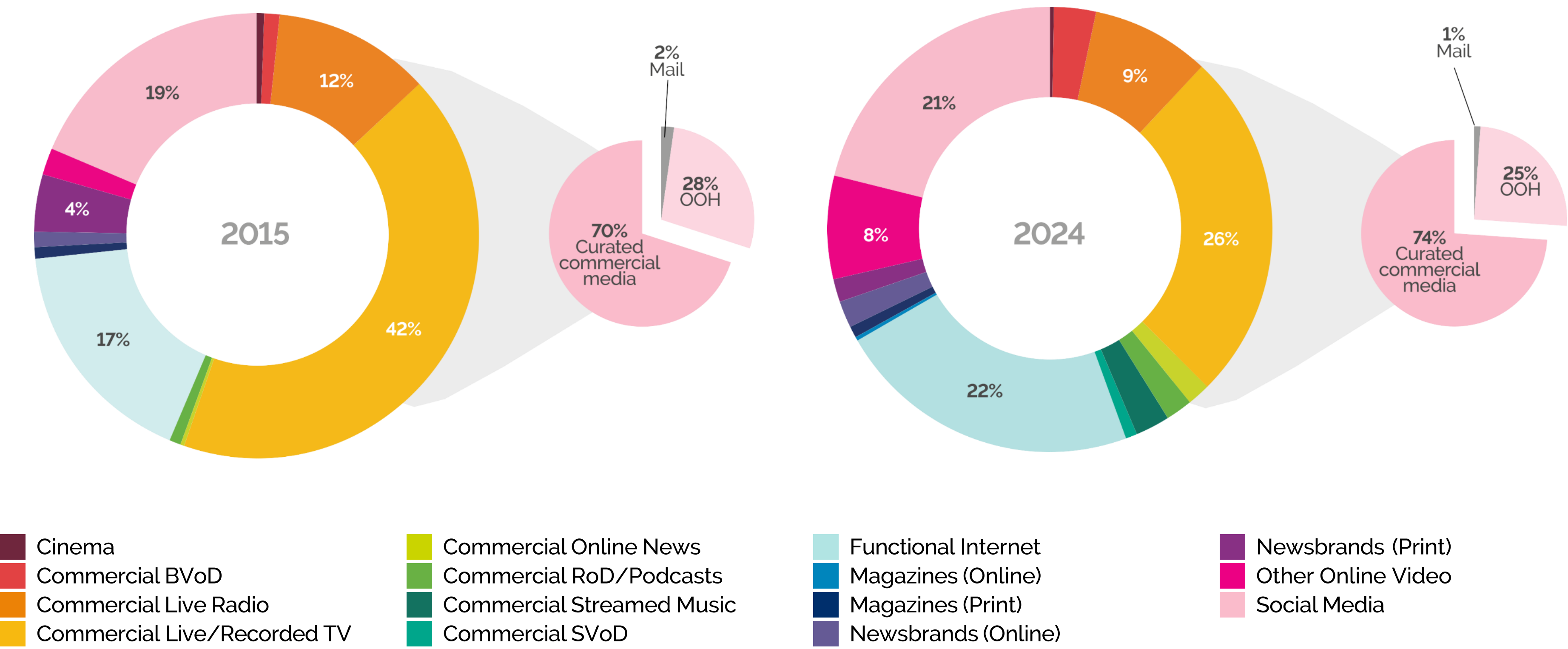


Source: IPA TouchPoints – Share of time with commercial curated media channels split by digital/non-digital.



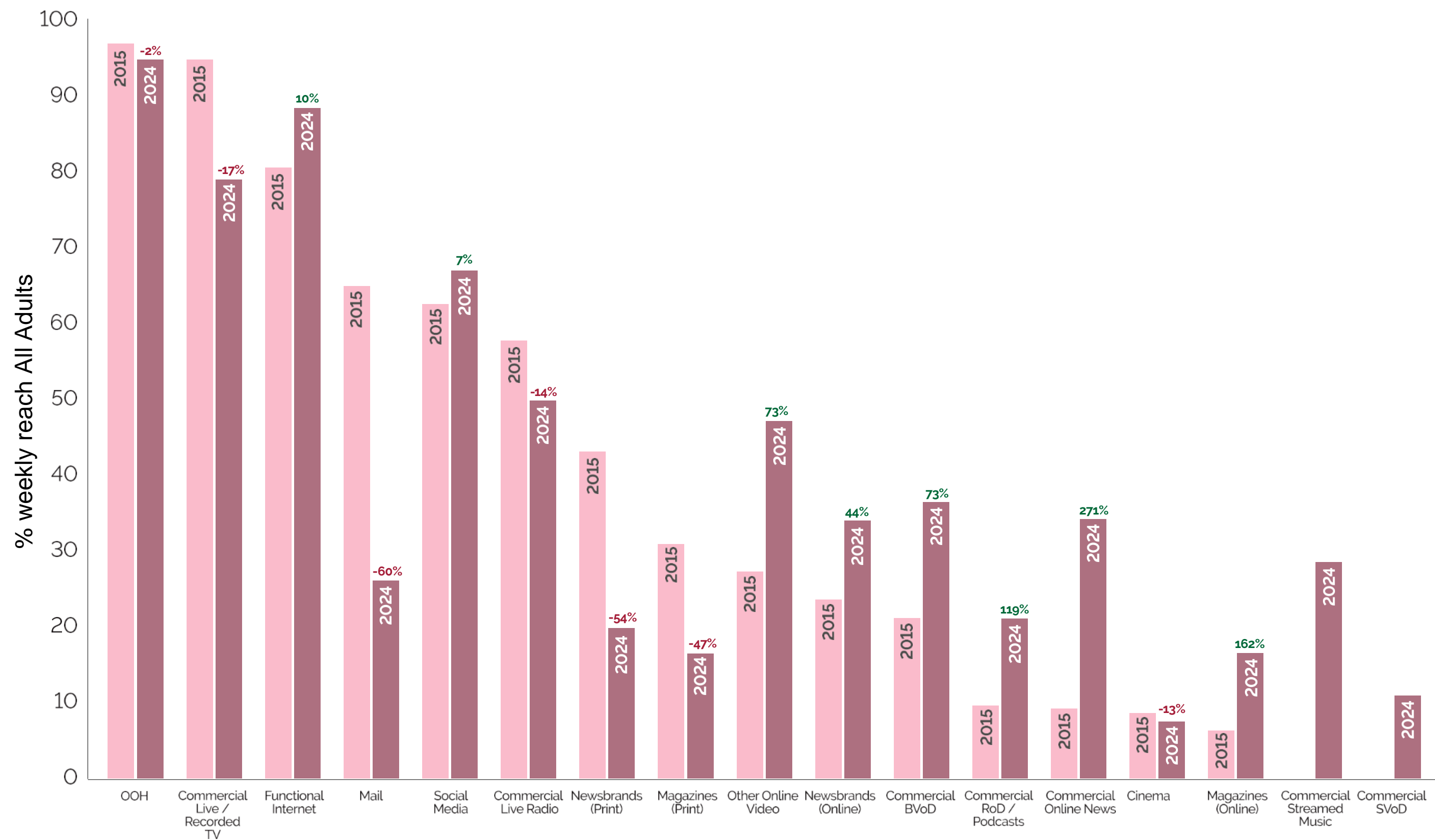
**How we spend**  
**our media day**

# All Adults With great diversification, comes great opportunity



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

# All Adults Decline? What Decline?

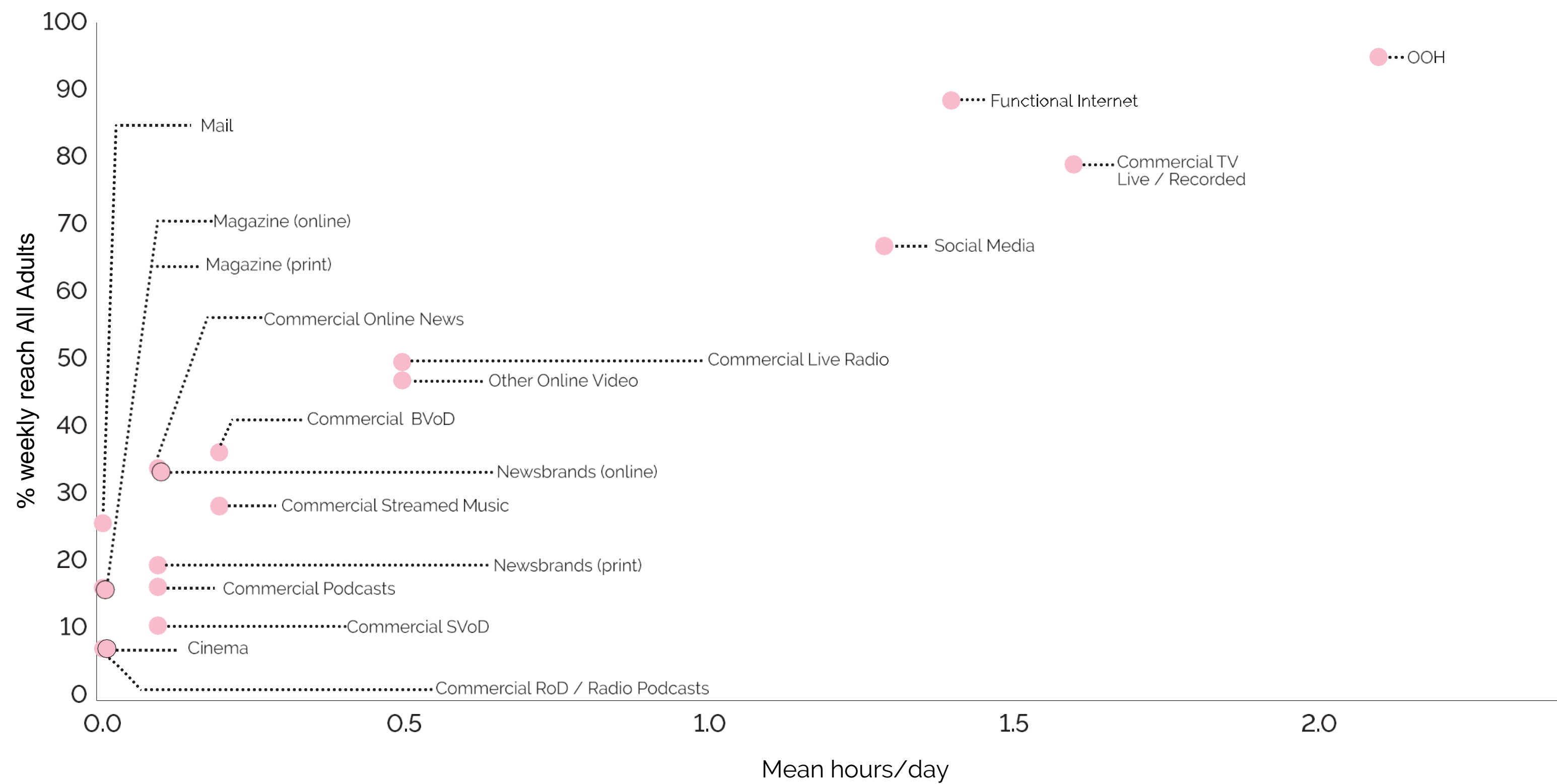


2024 top five properties by weekly reach (All adults)

Rank	Media	% Reach
1	ITV/STV	51
2	Facebook	45
3	YouTube	45
4	Channel 4	44
5	Instagram	34

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

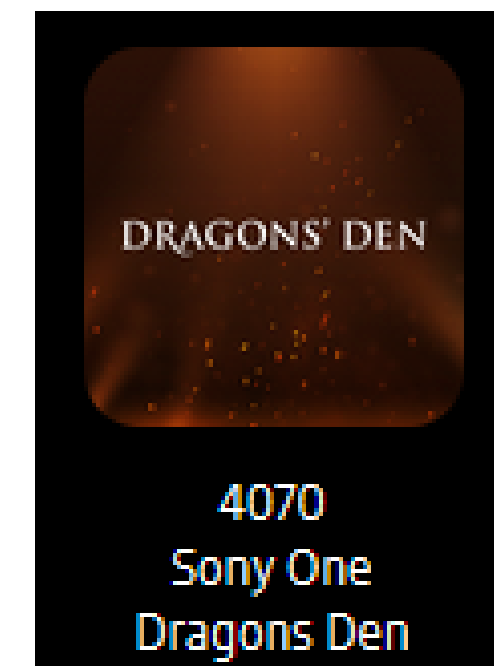
# All Adults Every media has a role yet those roles are ever changing



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

# The misunderstanding of Meaden and how it's bad for everyone

- Dragon's Den
- Peak BBC Audience of **4.14m** viewers
- **6.1%** of UK Population tune in
- **FAST - 9 Million Samsung TV sets** capable of receiving Samsung TV+
- **4070 Sony One Dragons Den**
- By that logic, there could be up to 549,000\* potential Dragon's Den fans viewing
- **Dragon's Den 00:26 We'll be right back**



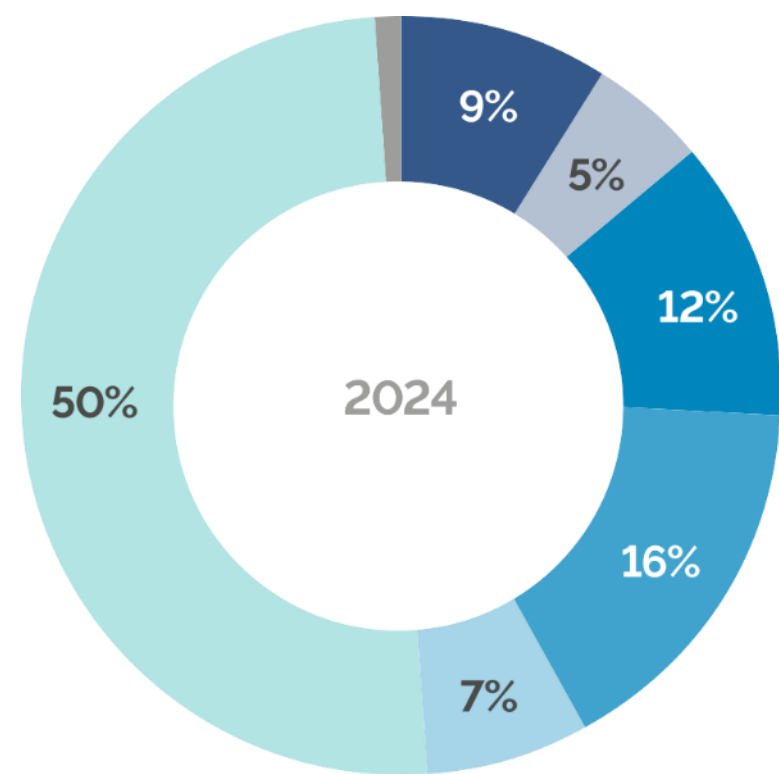
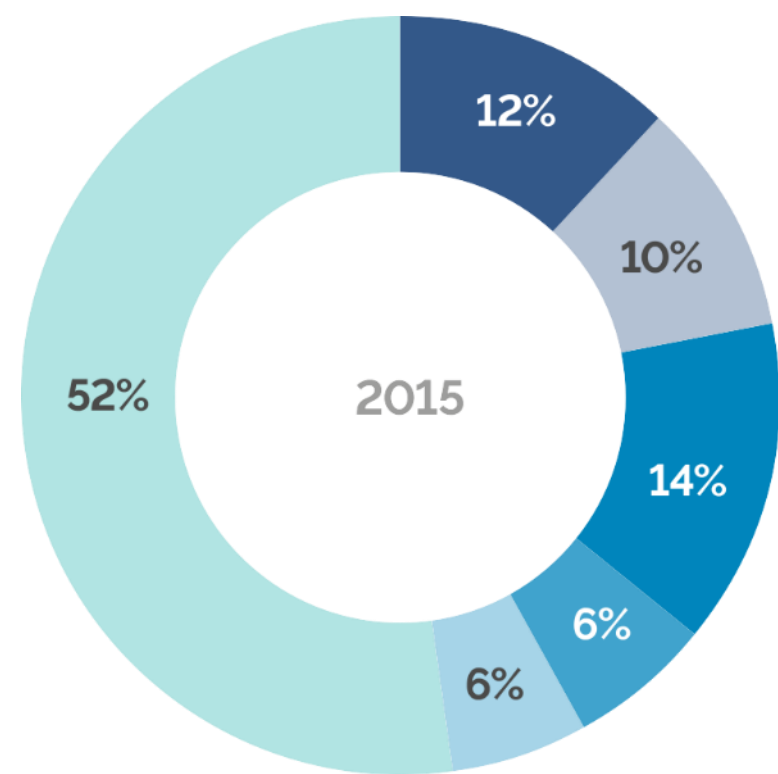
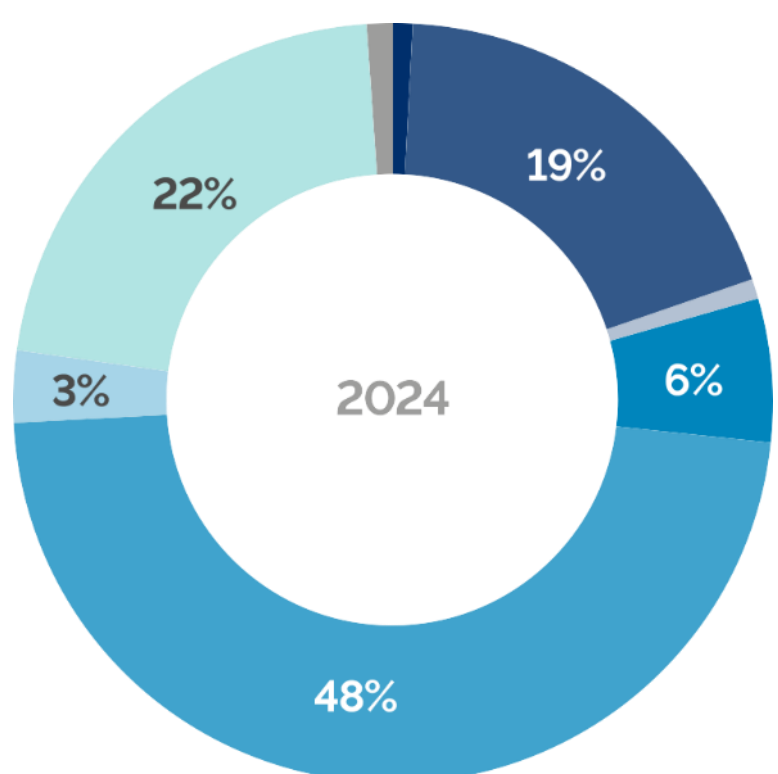
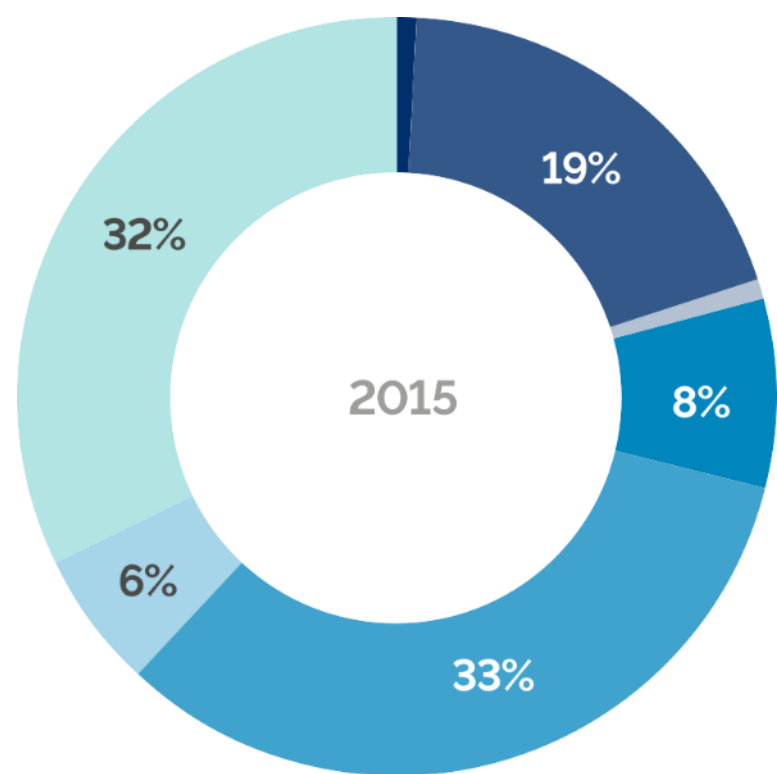


**Small shifts with  
seismic impacts or  
seismic shifts with  
small impacts?**

# Understanding device usage helps unlock the true opportunities of the media

16-34s

55+



- Console

PC/Laptop
- Print

Radio set
- Smartphone

Tablet
- TV set

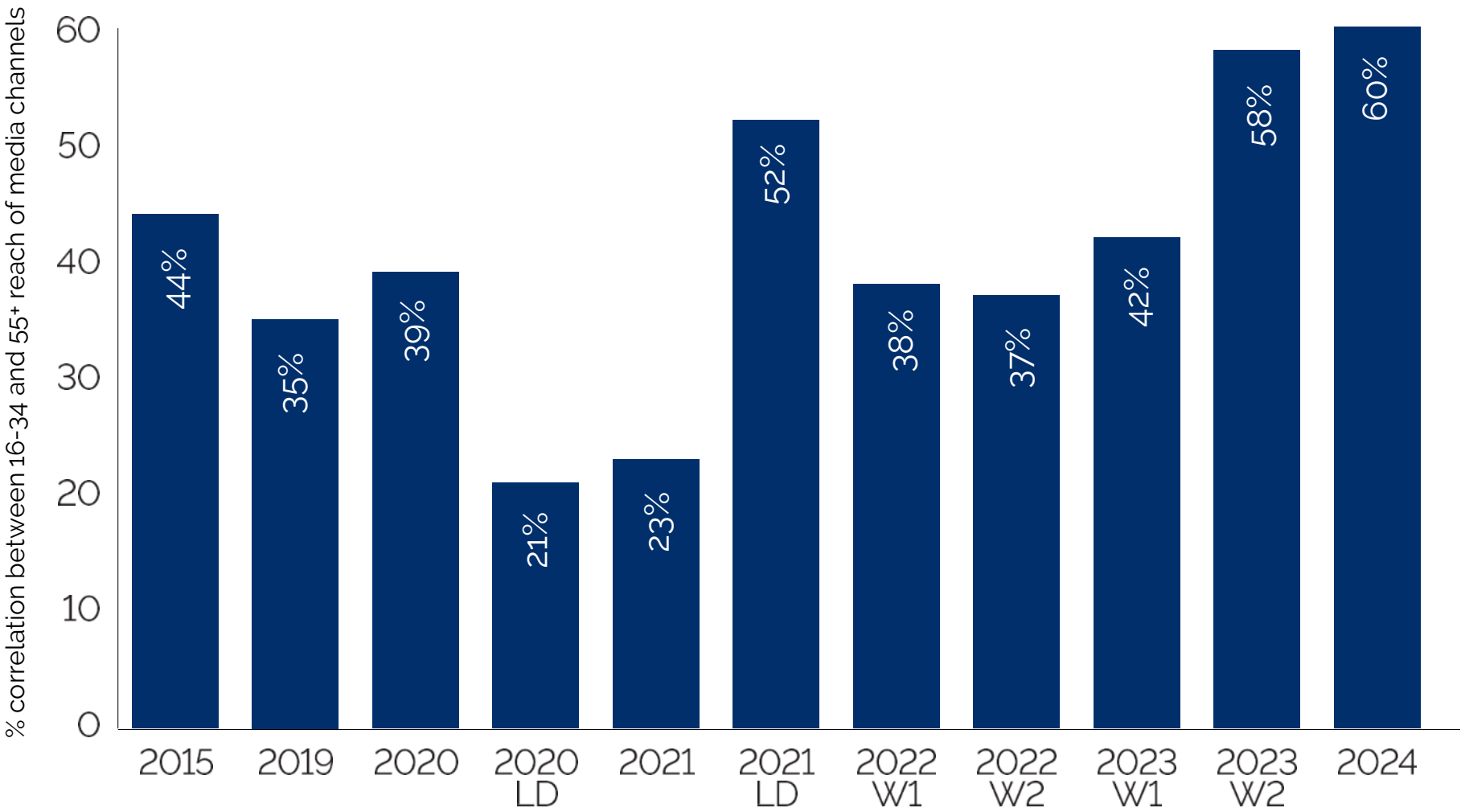
Voice activated

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

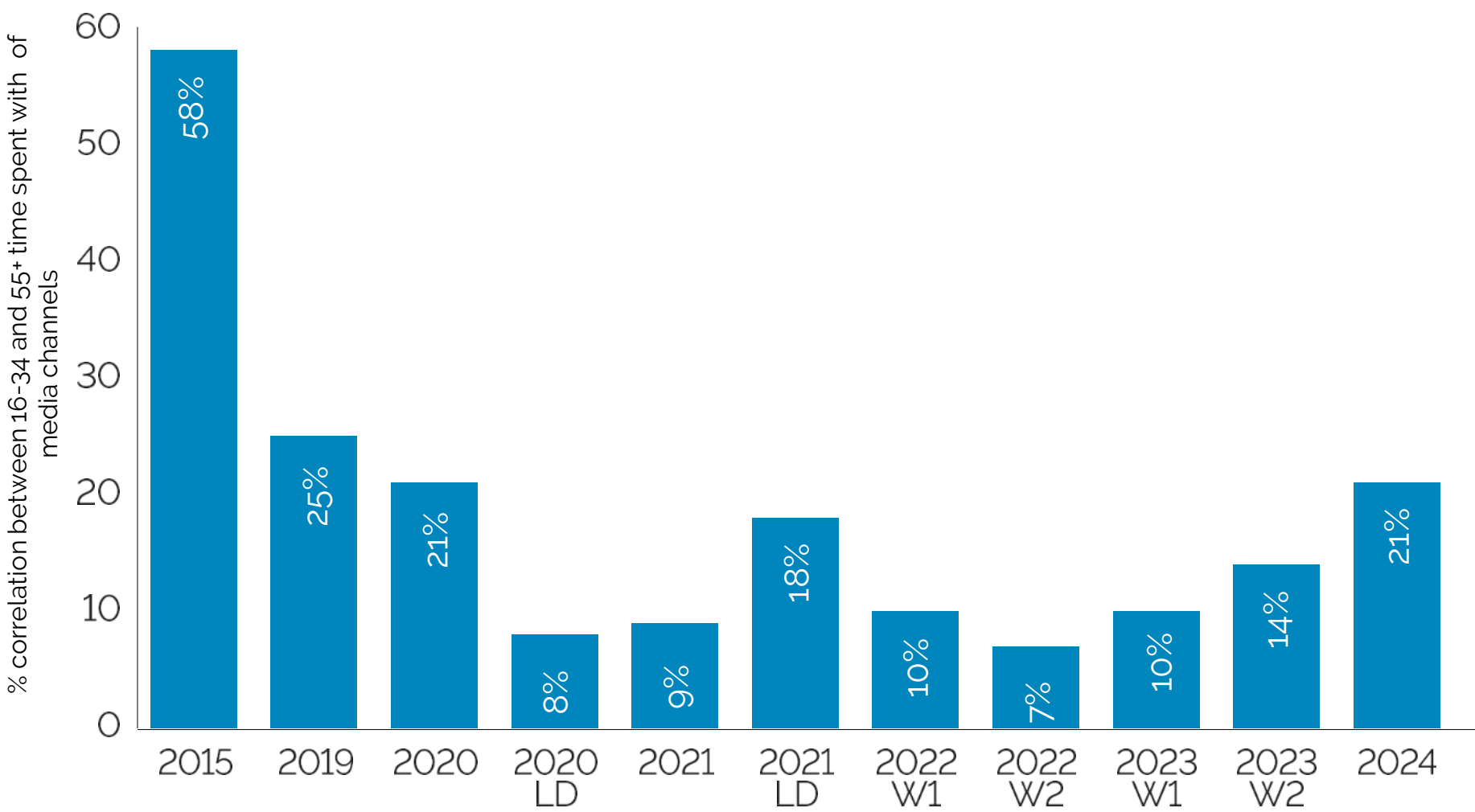
# 16-34 & 55+ are using more of the same platforms...

## ...but not in the same way

Comparing the correlation of the reach of curated commercial media channels between 16-34 and 55+



Comparing the correlation of time spent with curated commercial media channels between 16-34 and 55+

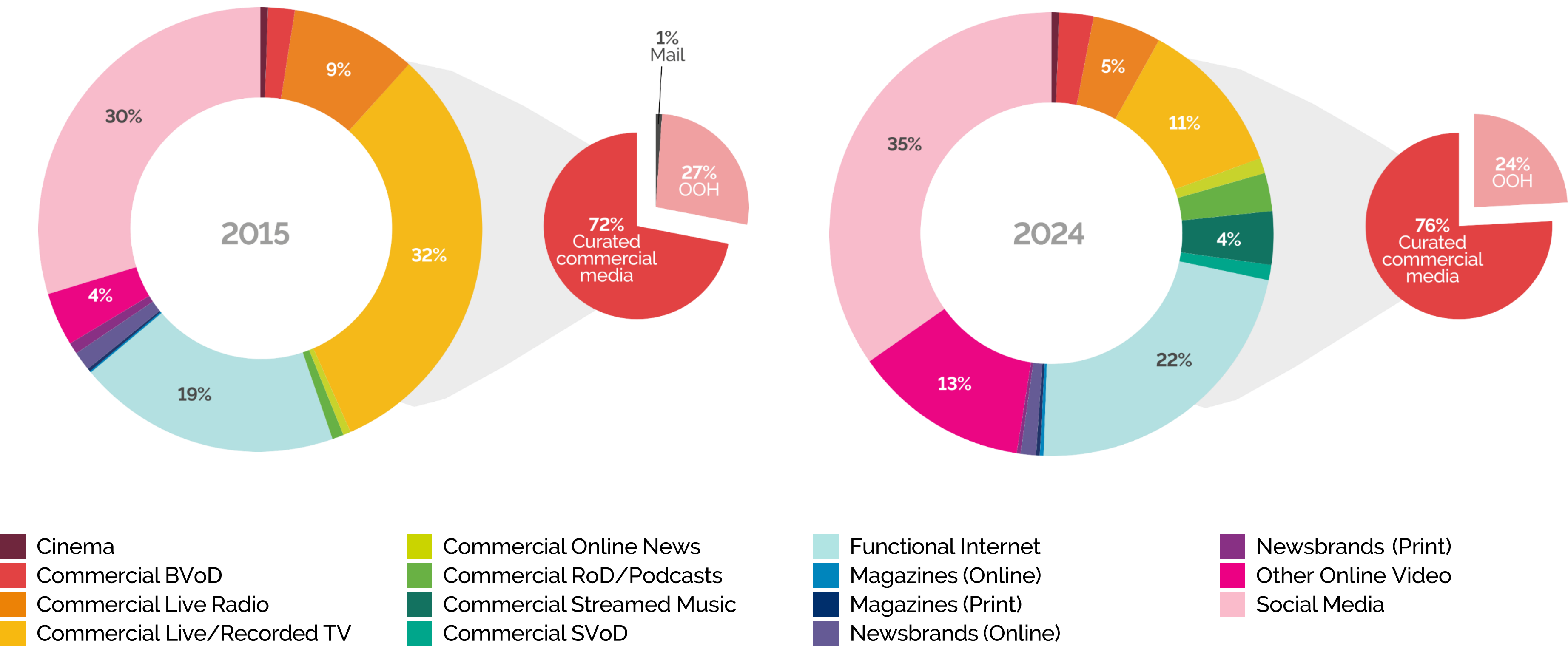


Source: IPA TouchPoints – Weekly reach of curated commercial media channels.

**16-34**

shifting slowly

# 16-34 Have we peaked too soon?

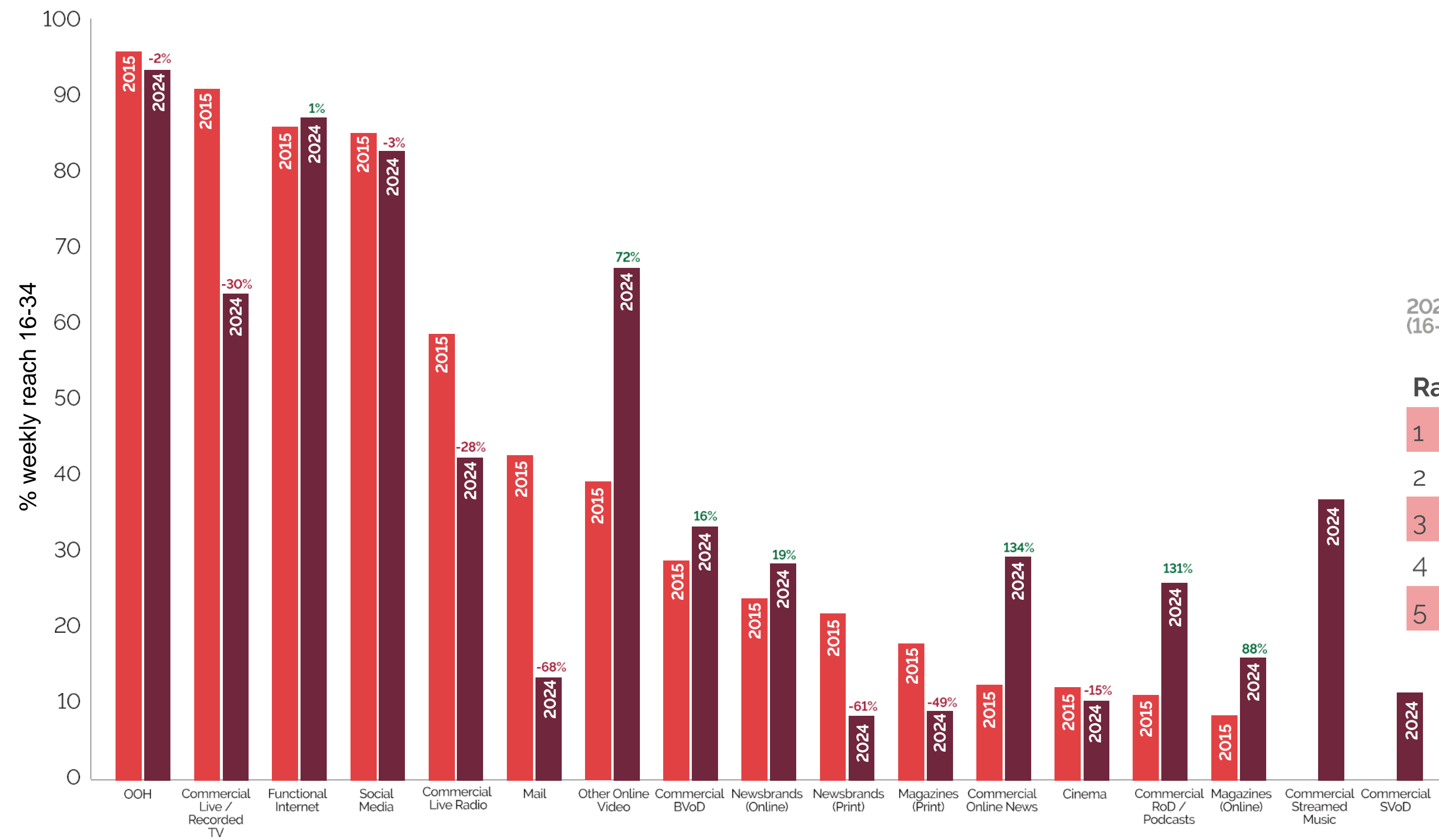


Source: IPA TouchPoints – Weekly total share of time spent with commercial media for 16-34 broken down by buyable media types.



# 16-34 Social scale is undeniable

But this isn't Emily in Paris ☹️ and one media won't save the day



2024 top five properties by weekly reach (16-34)

Rank	Media	% Reach
1	YouTube	66
2	Instagram	60
3	Facebook	49
4	TikTok	39
5	Snapchat	32

Source: IPA TouchPoints – Weekly reach of buyable media types for 16-34.

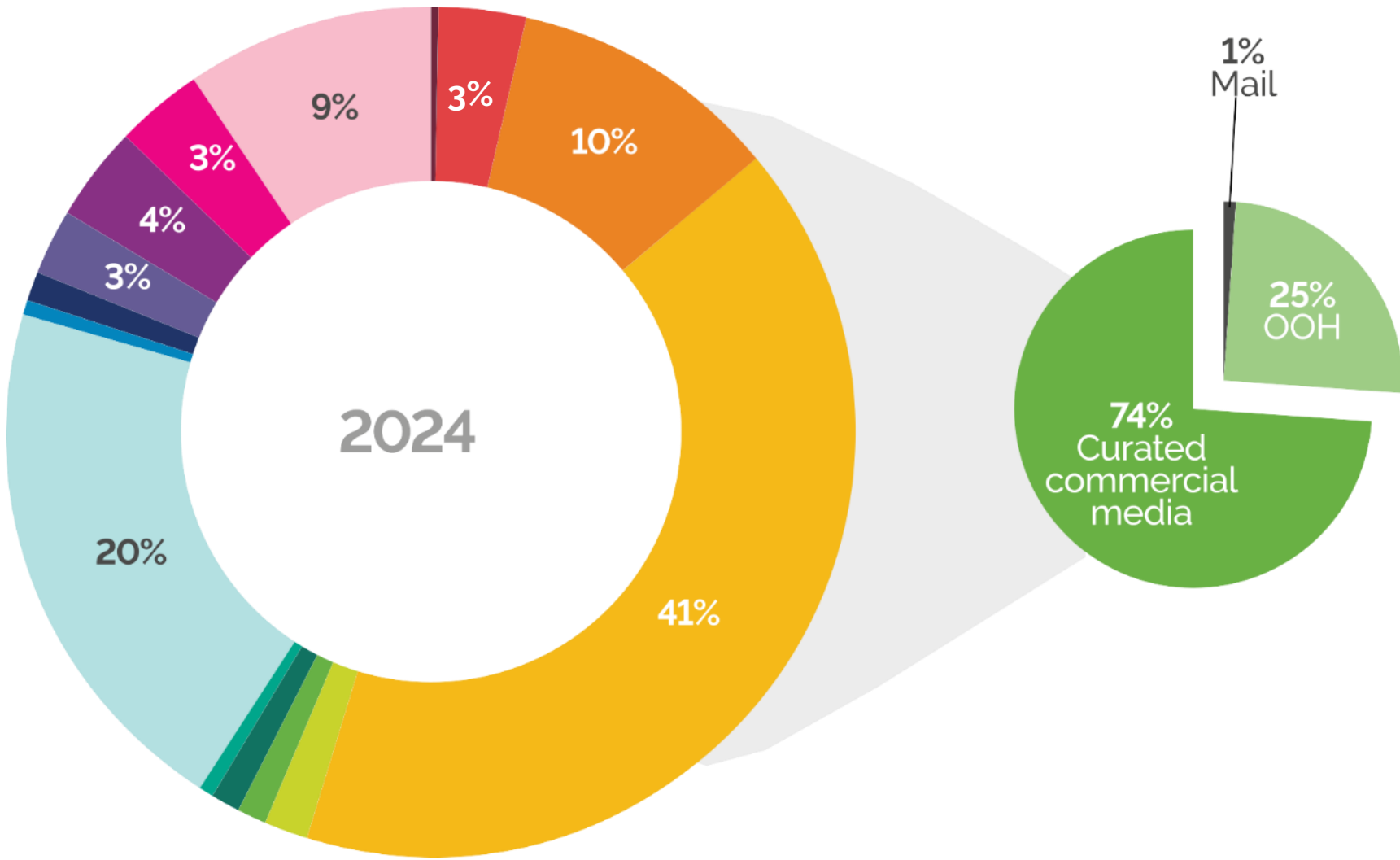
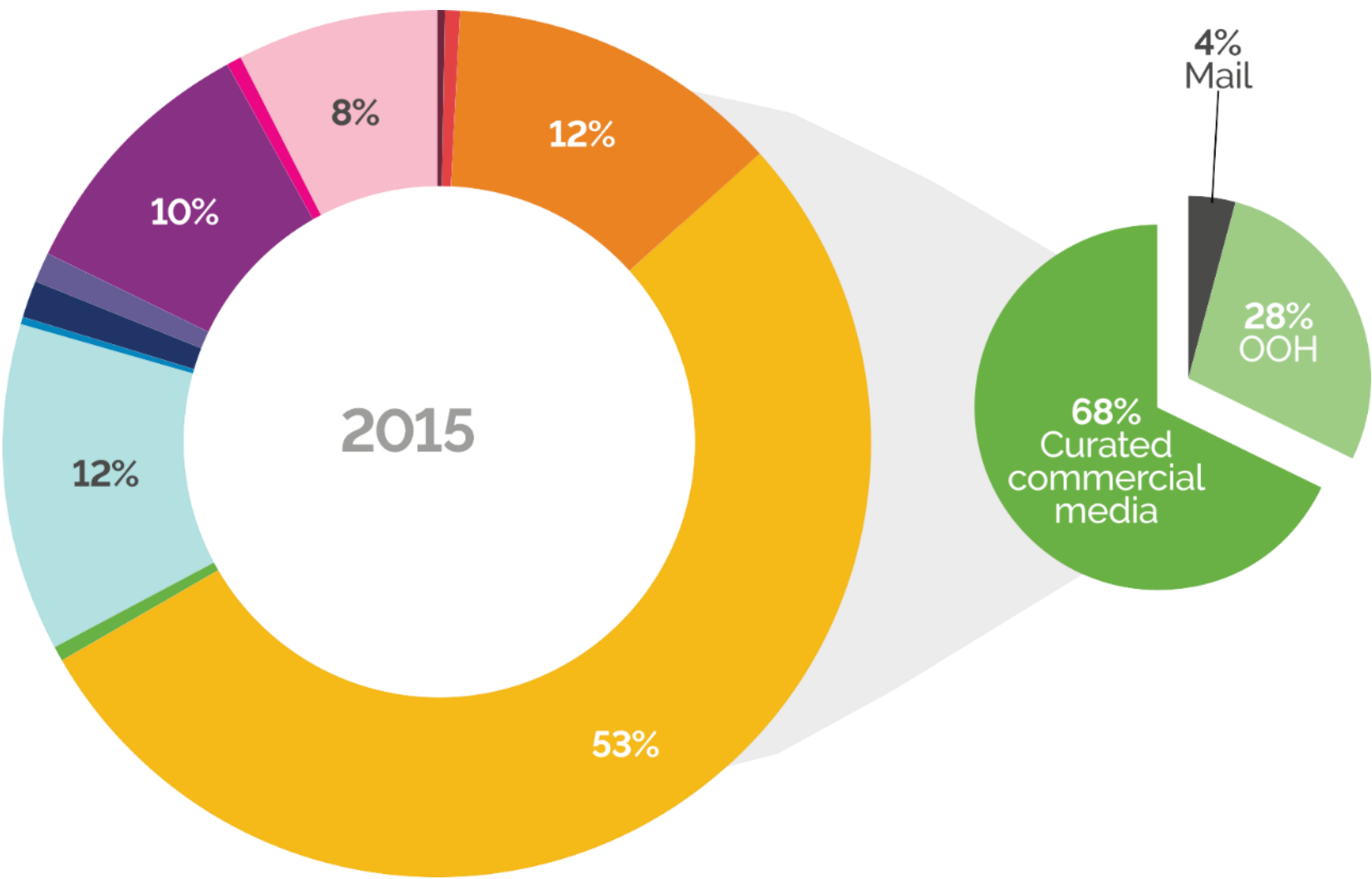
**35-54**

**straightforward  
similarity**

**55+**

starting seismically

# 55+ I thought they were all TV?

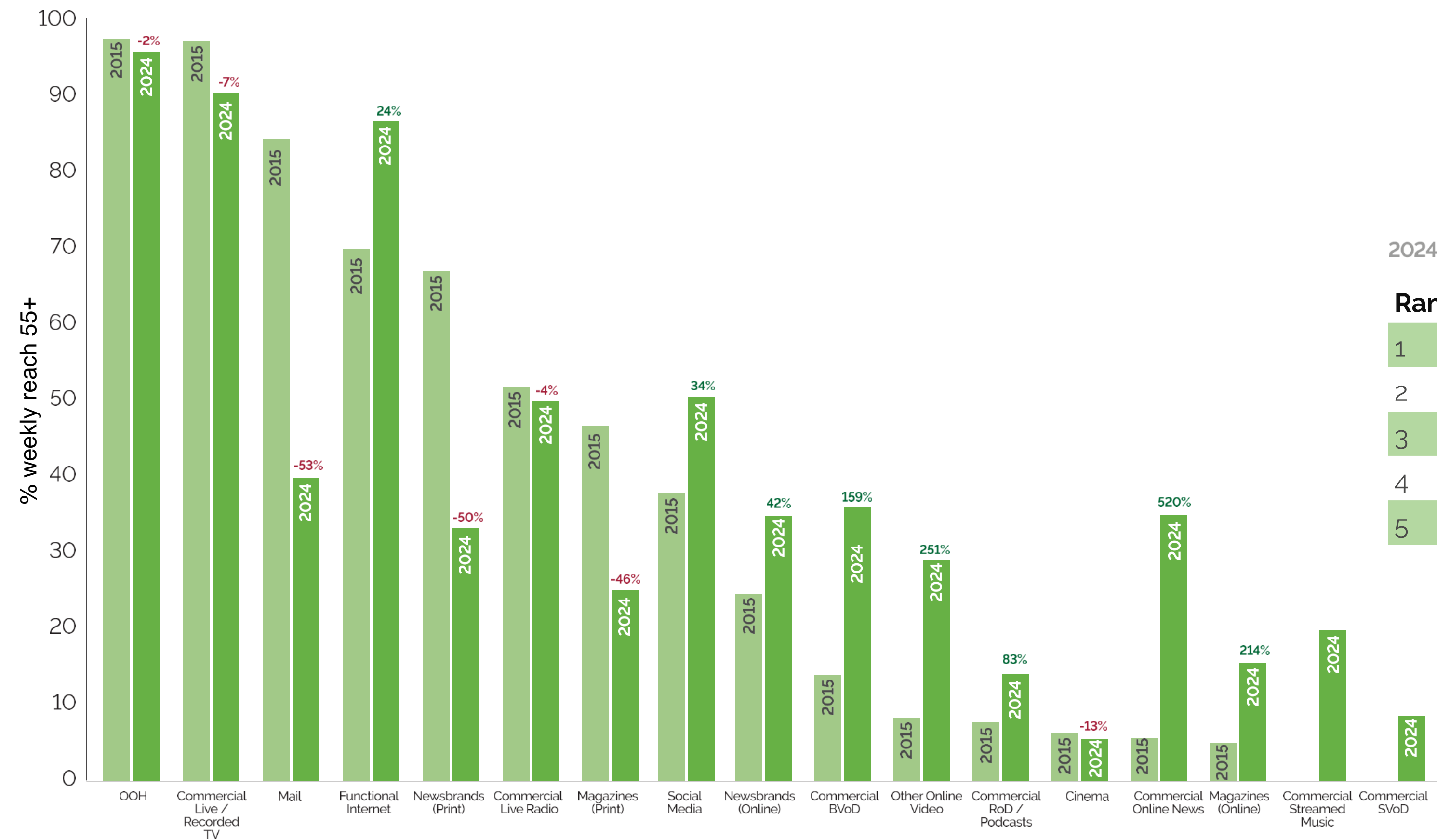


- Cinema
- Commercial BVoD
- Commercial Live Radio
- Commercial Live/Recorded TV
- Commercial Online News
- Commercial RoD/Podcasts
- Commercial Streamed Music
- Commercial SVoD

- Functional Internet
- Magazines (Online)
- Magazines (Print)
- Newsbrands (Online)
- Newsbrands (Print)
- Other Online Video
- Social Media

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

# 55+ The biggest missed opportunity in advertising today



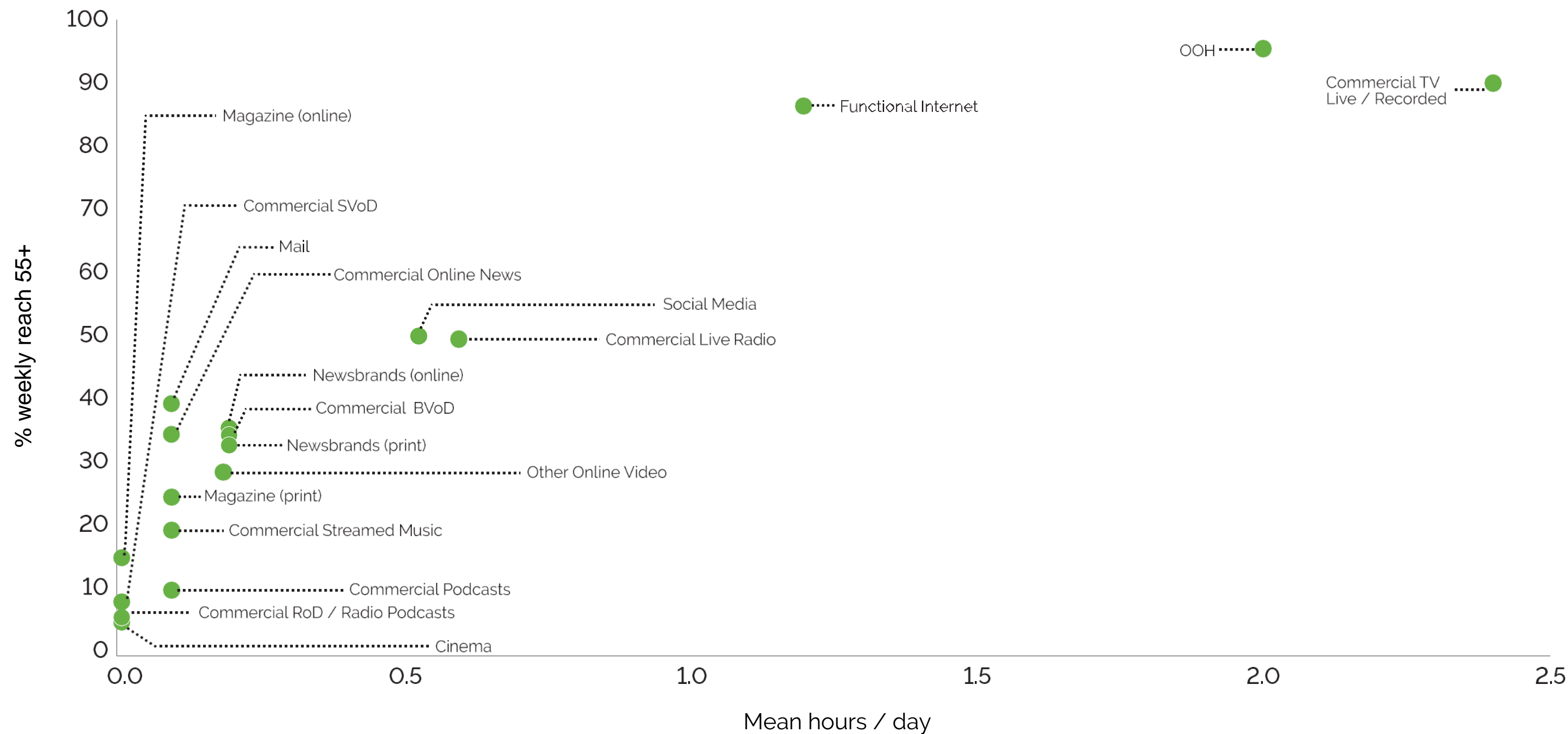
2024 top five properties by weekly reach (55+)

Rank	Media	% Reach
1	ITV/STV	70
2	Channel 4	54
3	Channel 5	43
4	Facebook	42
5	YouTube	26

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



# 55+ The long and short doesn't seem so long and short anymore



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



# Making sense The commercial media landscape 7

**Coming Wednesday September 10<sup>th</sup> 2025**

# Any Questions?



# Thank you

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