Mail METRO MEDIA

ABOUT TIME

ABOUT TIME OVERVIEW

1. INTRO / METHODOLOGY

2. CHANGES TO WORK LIFE

3. CHANGES IN SOCIALISING VS ALONE TIME

4. CHANGES TO LEISURE

5. CHANGES TO OUR ENJOYMENT OF TIME

6. REVIEW OF THE WEEK

7. THE AGE OF DISTRACTION & CAPTURING MENTAL AVAILIBILITY

8. CONSIDERATIONS FOR BUILDING CONNECTIONS

INTRODUCING 'ABOUT TIME'

"Time is the most valuable thing a man can spend."

THEOPHRASTUS

PANDEMIC HAS CHANGED LIVES

The pandemic has had a profound impact on daily life for many. In 2024, four in ten continue to say that it has changed their daily lives.

LIFE IS DEREGULATED

Life has grown increasingly deregulated (for many), with societies moving away from rigid schedules and embracing fluidity in their daily routines.

TIME TO UNDERSTAND

Time (and how it is spent) remains central to understanding consumer behaviour.

Marketeers must continue to understand where these shifts are occurring, and how people are spending their time differently, to pinpoint when people are most receptive to commercial messages.

ALIGN WITH MOMENTS OF MAXIMUM IMPACT

By treating time as the precious resource it is, brands can align campaigns with moments of maximum impact, whether through targeting high-value intervals or adapting to the evolving rhythms of modern life.

Through thoughtful analysis and strategic application, media campaigns can achieve heightened resonance and relevance in the lives of their audiences.

HELPING BRANDS TO CONNECT

This study attempts to assist in that goal. Drawing on diary study data, first undertaken in 2016, we—alongside Trajectory—aim to provide an understanding of how behaviour has evolved, examine the factors shaping how time is spent, and determine how, when, and where to best connect with consumers with relevant messages. By bridging insights from the past with emerging trends, we seek to inform more effective and impactful media planning strategies.

Richard Lay, Head of Research

Mail Metro Media

INTRODUCING ‘ABOUT TIME’

ALIGN WITH MOMENTS OF MAXIMUM IMPACT

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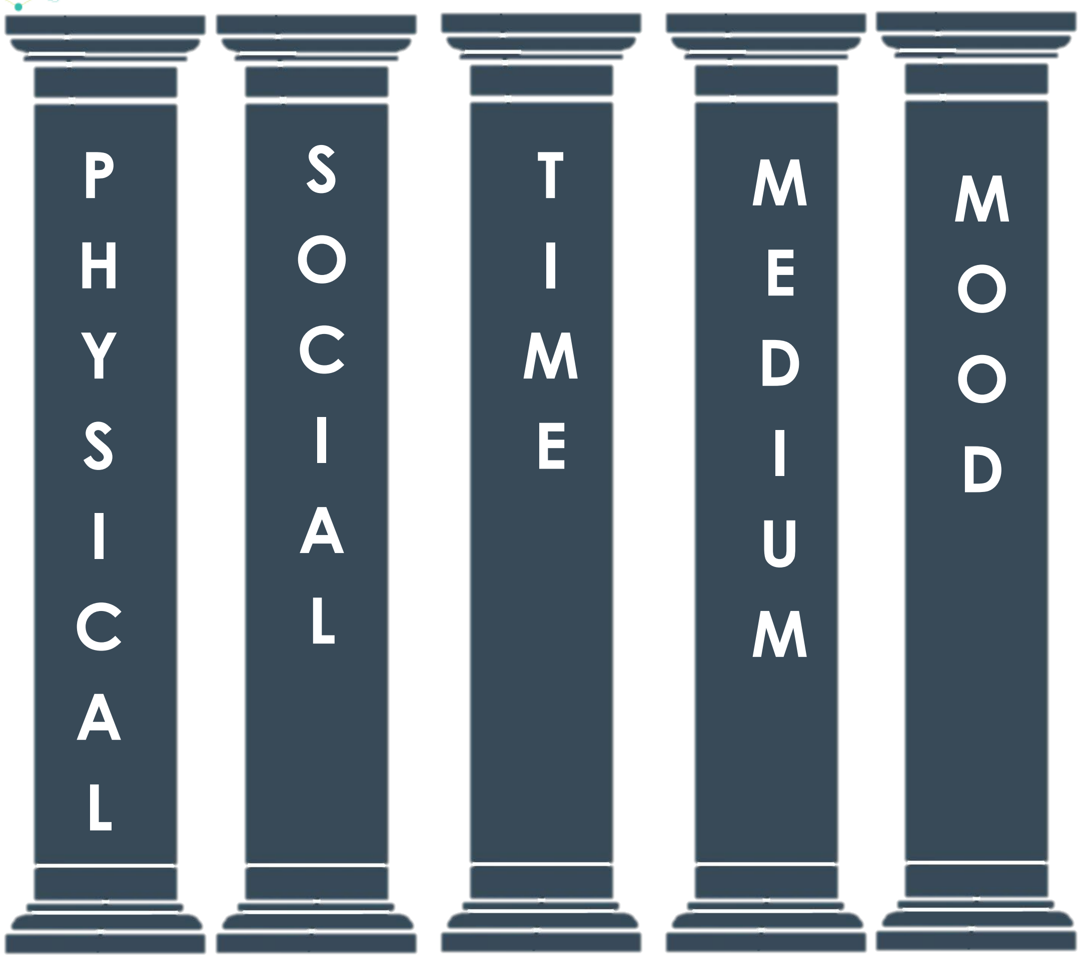
THE FIVE PILLARS OF PLANNING



1. Where do I reach them?
2. Who are they with?
3. When should I reach them?
4. What media should I use to target?
5. What mindset are people in?

In the mood for advertising, Fred E. Bronner (2007) p1.

A REVIEW OF METHODOLOGY

Our research partners

TRAJECTORY

CENTRE FOR RESEARCH ON TIME USE

UCL

Third party sample provider, Dynata LLC.

Diary data at 10-minute intervals; 144 data points across a day; 1000+ data points across a week

1,226 participants	838 participants	1,012 participants
2024	**2020**	**2016**

PRIMARY

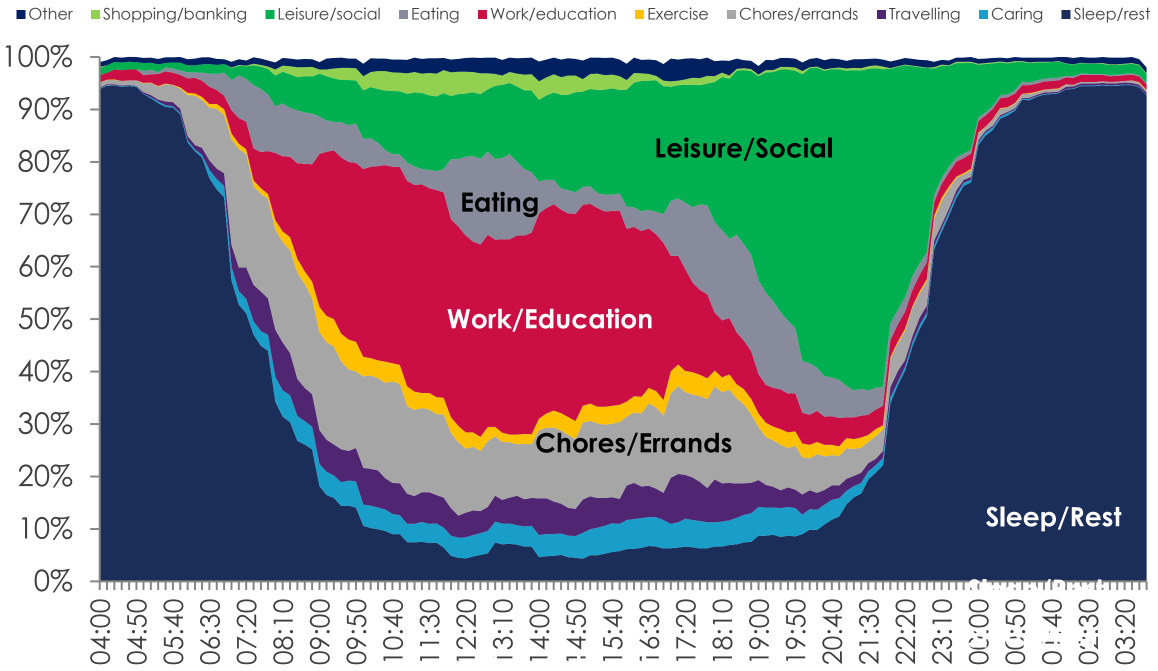
SECONDARY

SUB-PRIMARY

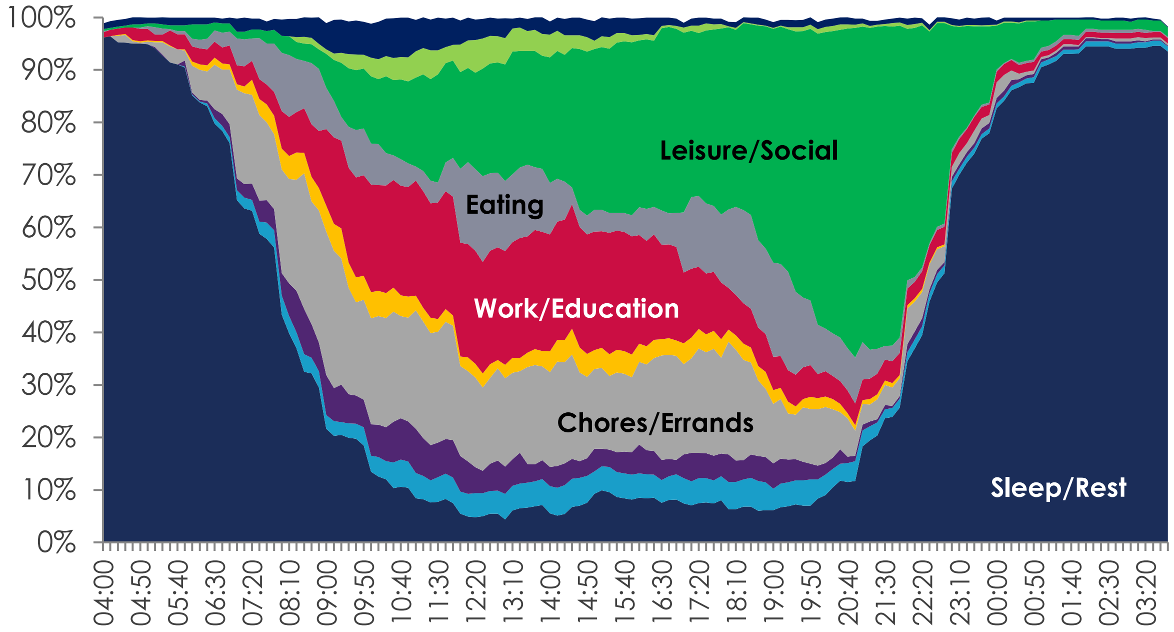
SUB-SECONDARY

AN INTRODUCTION TO THE DATA

...THE AVERAGE WEEK



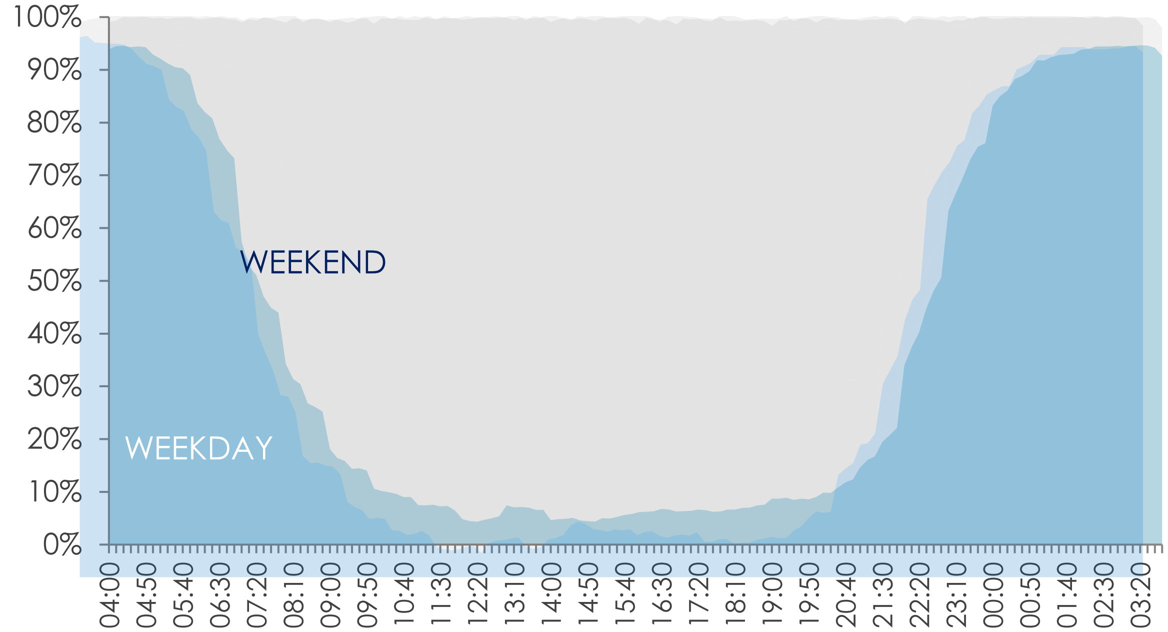
...THE AVERAGE WEEKEND



Diary data enables us to understand people's days. Here we have weekday and weekend side by side. We can see that on the face of it they look similar but as we move through there are some surprising (and unsurprising) differences.

Source: Trajectory 2024

SLEEP ROUTINES DON'T DIFFER MUCH ACROSS THE WEEK



Source: Trajectory 2024

SLEEP

Sleep routines don't differ much on average.

Weekends afford people more opportunities to have a lie in but there is little variation in sleeping habits.

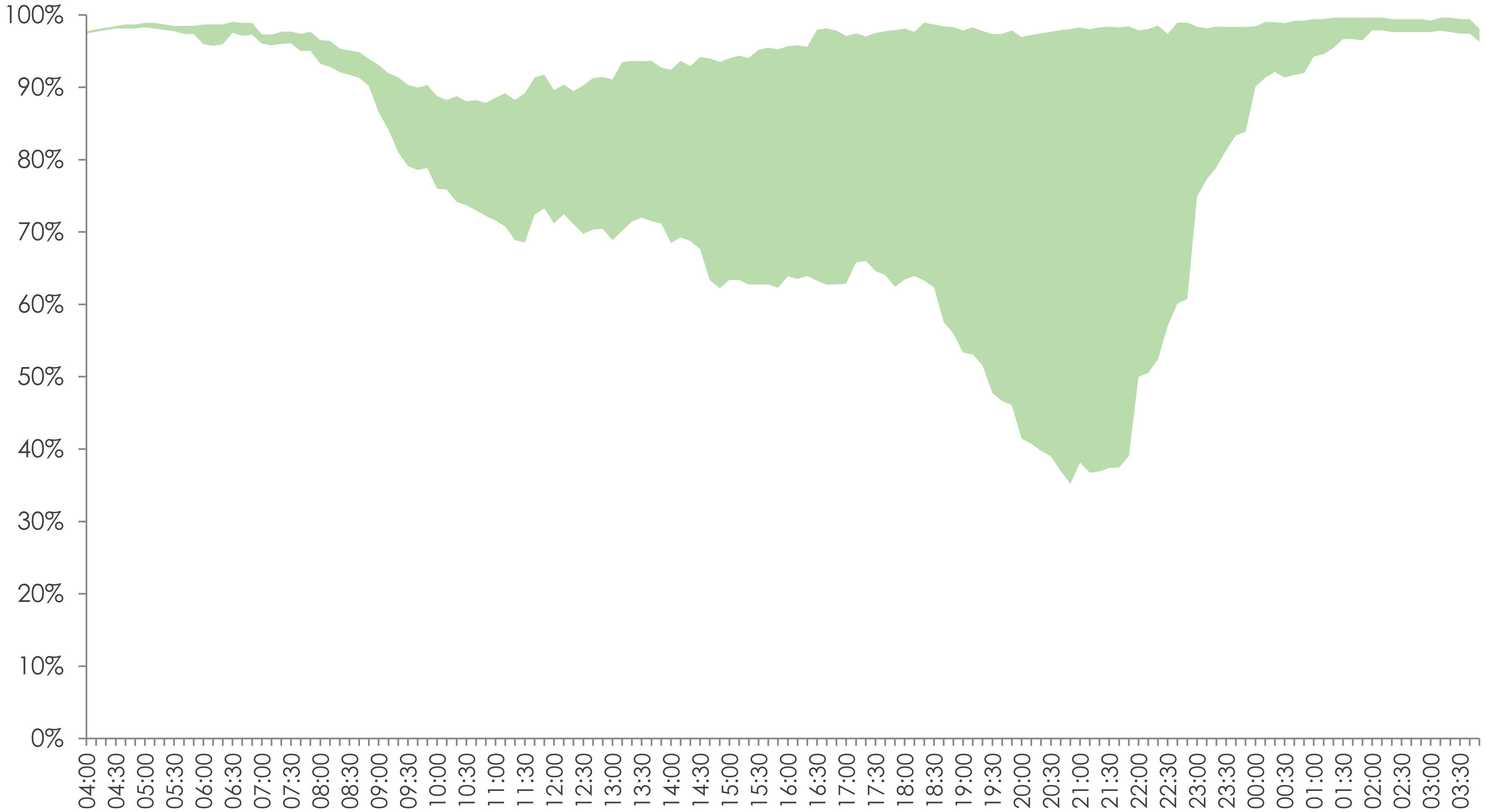
On a weekday the majority of people are awake by 7.10AM; on the weekend it is 7.50AM.

WEEKEND LEISURE IS AN ALL-DAY PURSUIT

LEISURE
Working habits are such that people are typically working Monday to Friday.

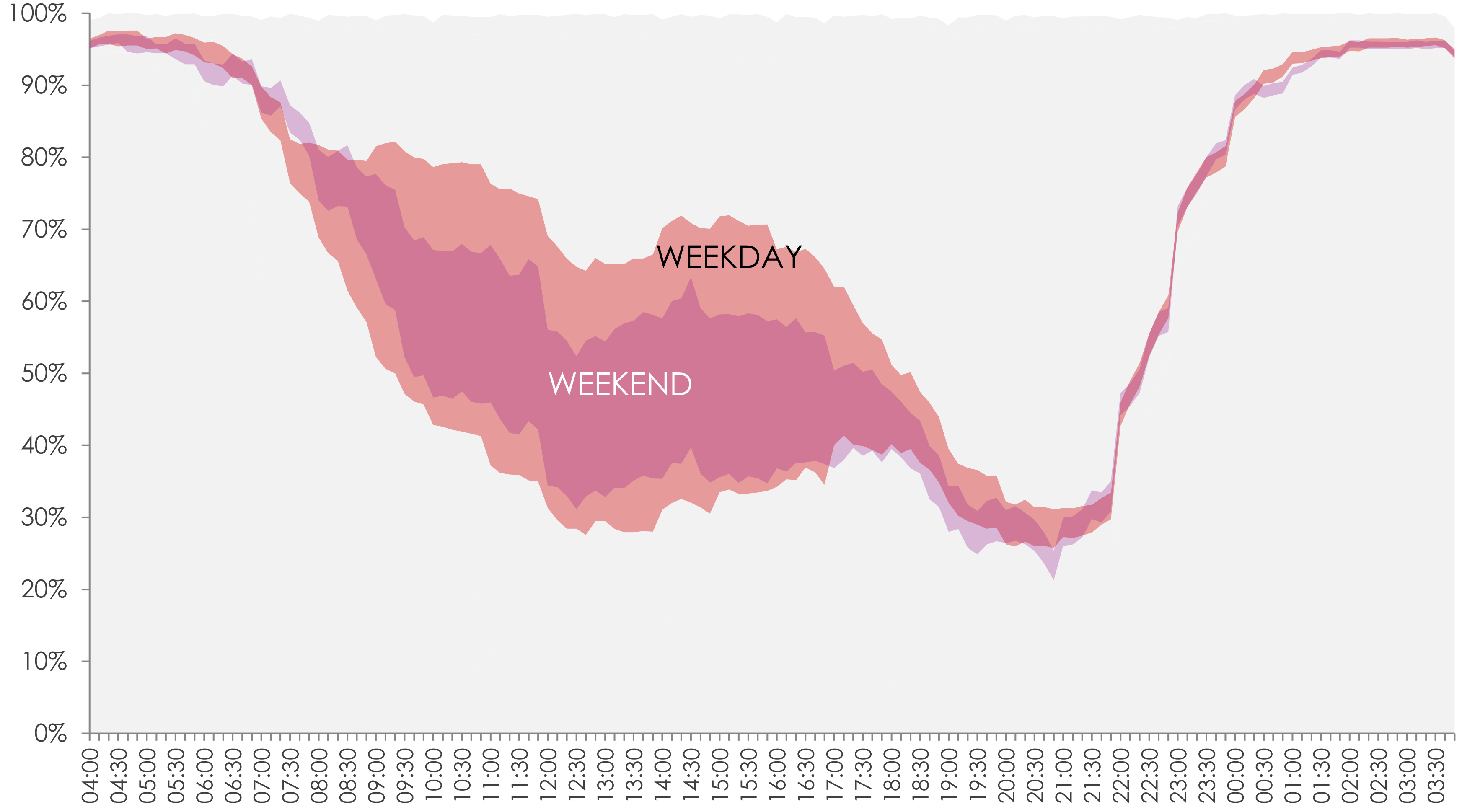
Leisure and socialising extends across the entire weekend.

Peak leisure time remains mid-evening – 20:30 – 21:00.



Source: Trajectory 2024

MANY PEOPLE ARE STILL WORKING WEEKENDS



WORK
Weekday and weekend working follow a similar pattern, the bulk of work happening during the day.

What sets them apart is the proportion of people working.

There have been noticeable changes in working habits on a weekend – which will be discussed later in the presentation.

Source: Trajectory 2024

CHANGES TO WORK

CHANGES TO THE WORLD OF WORK...

1

SIGNIFICANT RISE IN WEEKDAY WORKING

2

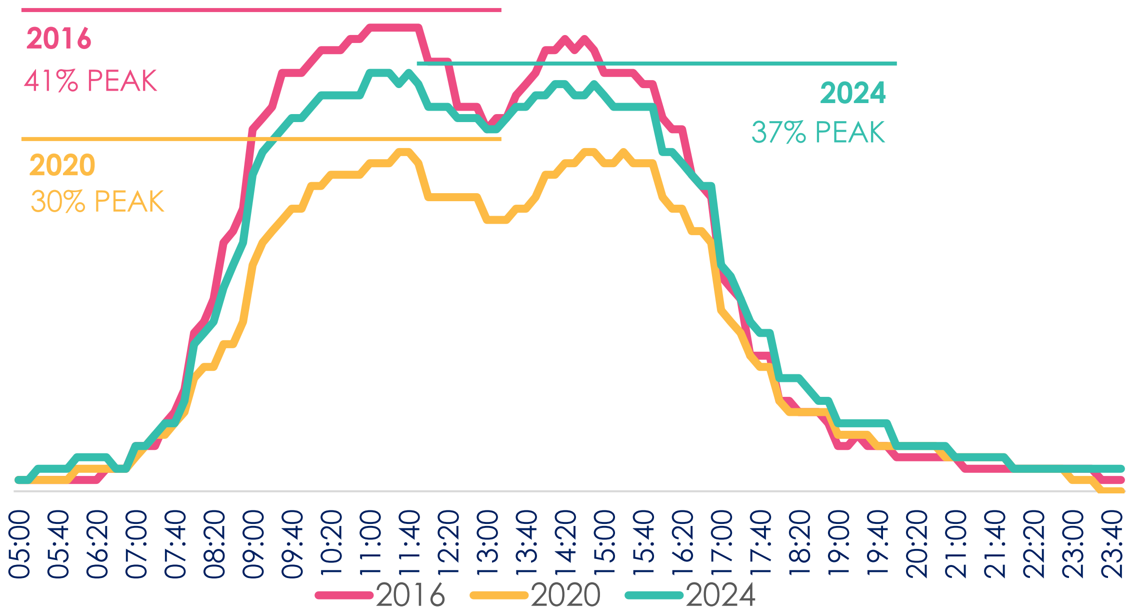
COMMUTING HAS RECOVERED SINCE PANDEMIC

3

GROWTH IN WEEKEND WORKING

WEEKDAY WORKING IS UP ON PANDEMIC LEVELS

% of people working as primary activity (Weekdays: 2016-2024)



2025
75.1%
36.4HRS
WORKED

2021
74.4%
34.5HRS
WORKED

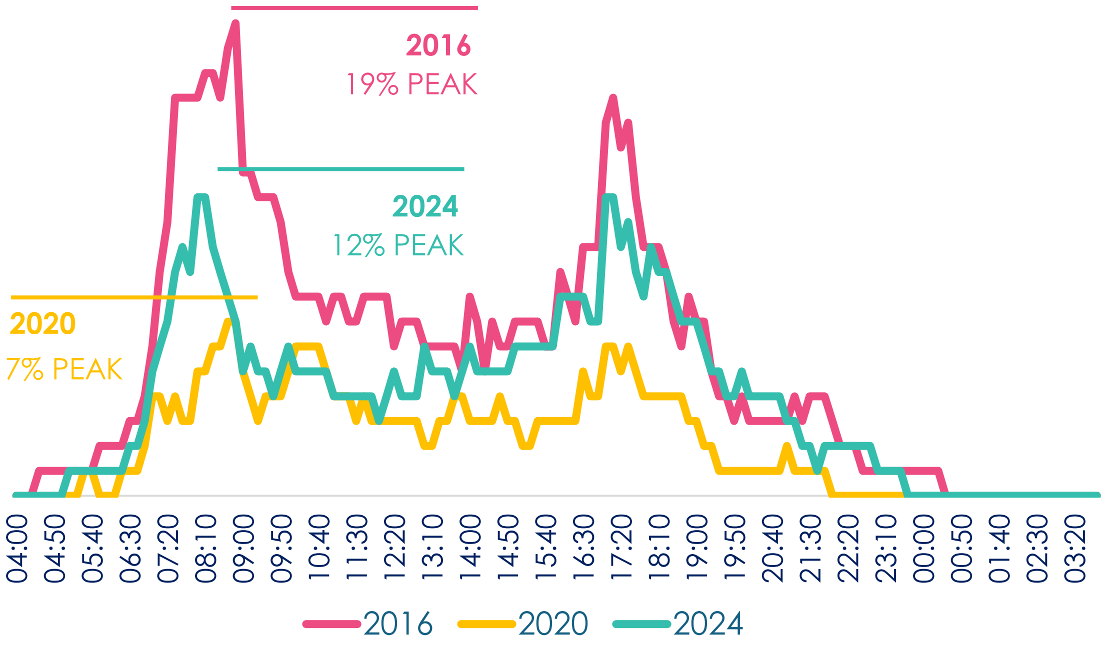
SOURCE: ONS Labour Force Survey. Feb-Apr '21; Feb-Apr '25. Average actual weekly hours for the FT workers (seasonally adjusted). Employment rate (aged 16 to 64, seasonally adjusted %).

Discussions on flexible working have been prominent in recent years, especially since the pandemic caused major changes. The peak proportion of people primarily engaged in paid work has risen by 7% since 2020. ONS data also shows a slight increase in employment rates and nearly two more hours worked per week on average.

Source: Trajectory 2024/2020/2016

COMMUTING HAS FOUND AN EQUILBRIUM – UP ON PANDEMIC LOW

Any Travelling as Primary Activity – Amongst Those In Work – Weekdays: 2016 to 2024



Two-thirds of workers doing at least three days – up from less than half in 2023

Source: Centre for Cities June 2024. https://www.centreforcities.org/reader/return-to-the-office/how-have-london-working-patterns-changed-since-the-pandemic/

Journey counts by bus tube: (July-Sept totals)*

51.6M 2020	**85.M** 2022	**107M** 2024

Largest increases in journey counts by day seen on Monday (+25%)

Source: TFL

Working from home has declined since lockdown, and weekday peaks in travel amongst those in work have increased by 5pp since 2020. 2024 commuting remains 7pp below 2016 levels, with more flexible attendance patterns in evidence. TfL data confirms steady growth in journeys since the pandemic.

Source: Trajectory 2024/2020/2016

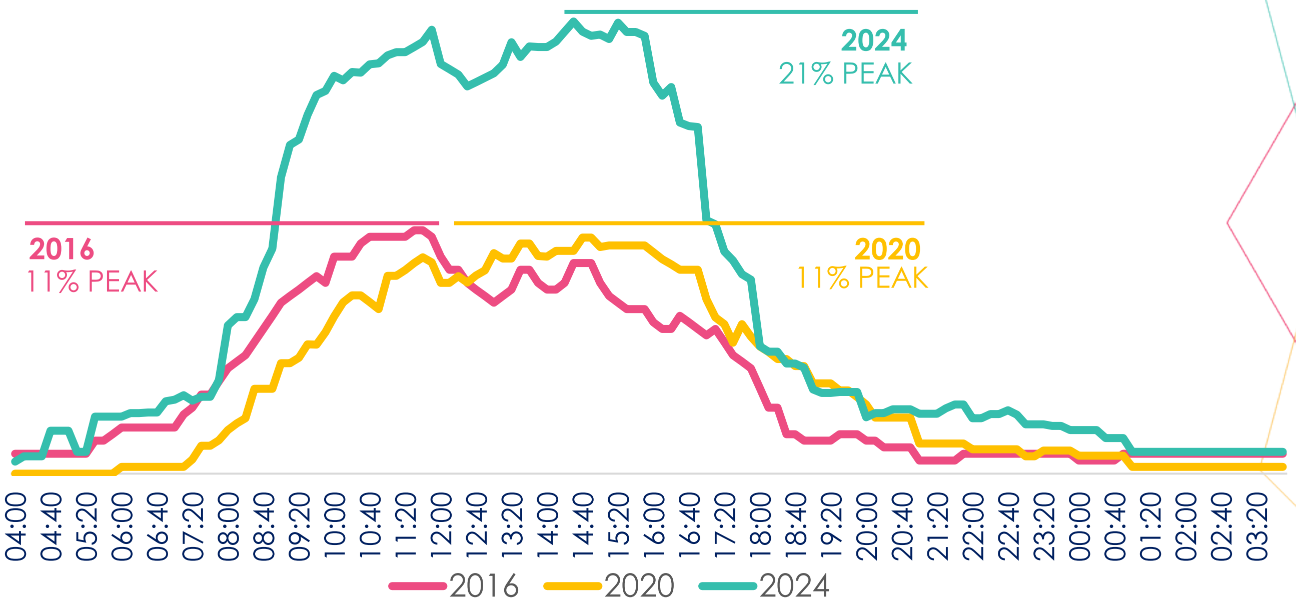
SIGNIFICANT RISE IN WEEKEND WORKING

21%
OF BRITONS SAY THEY HAVE WORKED AT THE WEEKENDS TO MAKE EXTRA INCOME
SOURCE: Ipsos 2022

120%
INCREASES IN 'WEEKEND ONLY' JOB SEARCHES
SOURCE: Indeed, Jan 2023 VS Jan 2022

110%
INCREASES IN 'NIGHT SHIFT PART TIME' JOB SEARCHES
SOURCE: Indeed, Jan 2023 VS Jan 2022

% of people working as primary activity – weekends: 2016-2024



The peak in people working on weekends has nearly doubled, rising from 11% in 2016 and 2020 to 21% in 2024. Studies show many Britons work weekends to earn extra income due to the rising cost of living. Increased searches for weekend and night shifts support this trend. This shift may reduce leisure spending and activity in 2024.

Source: Trajectory 2024/2020/2016

ABOUT TIME

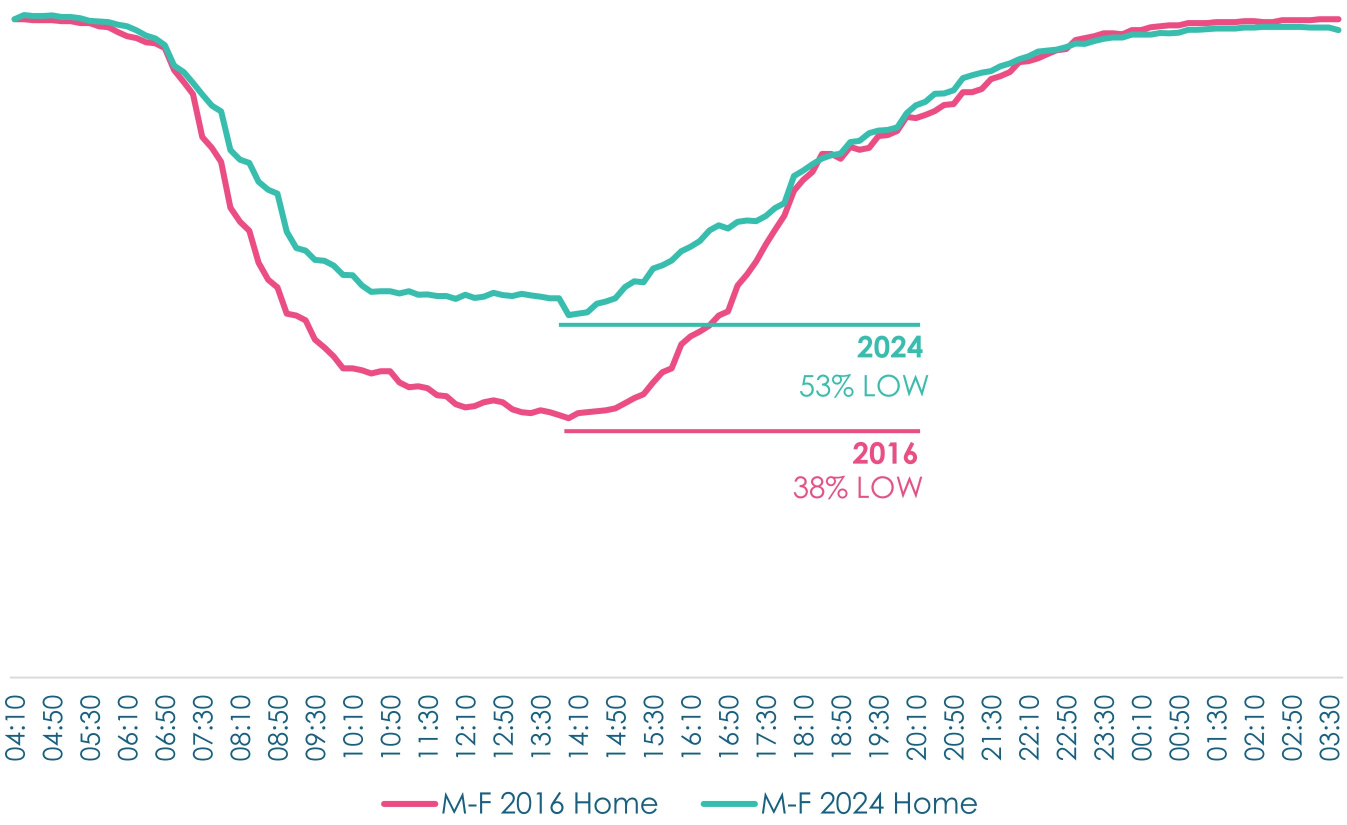
CHANGES IN SOCIALISING VS ALONE TIME

CHANGES IN SOCIALISING VS ALONE TIME

1. MORE LIKELY TO BE AT HOME DURING WEEK
2. INCREASINGLY SPENDING MORE TIME ALONE; IMPACT ON SOCIALISING
3. YOUNGER GROUPS MORE LIKELY TO SPEND WEEKDAYS ALONE

MORE LIKELY TO BE AT HOME DURING THE WEEK

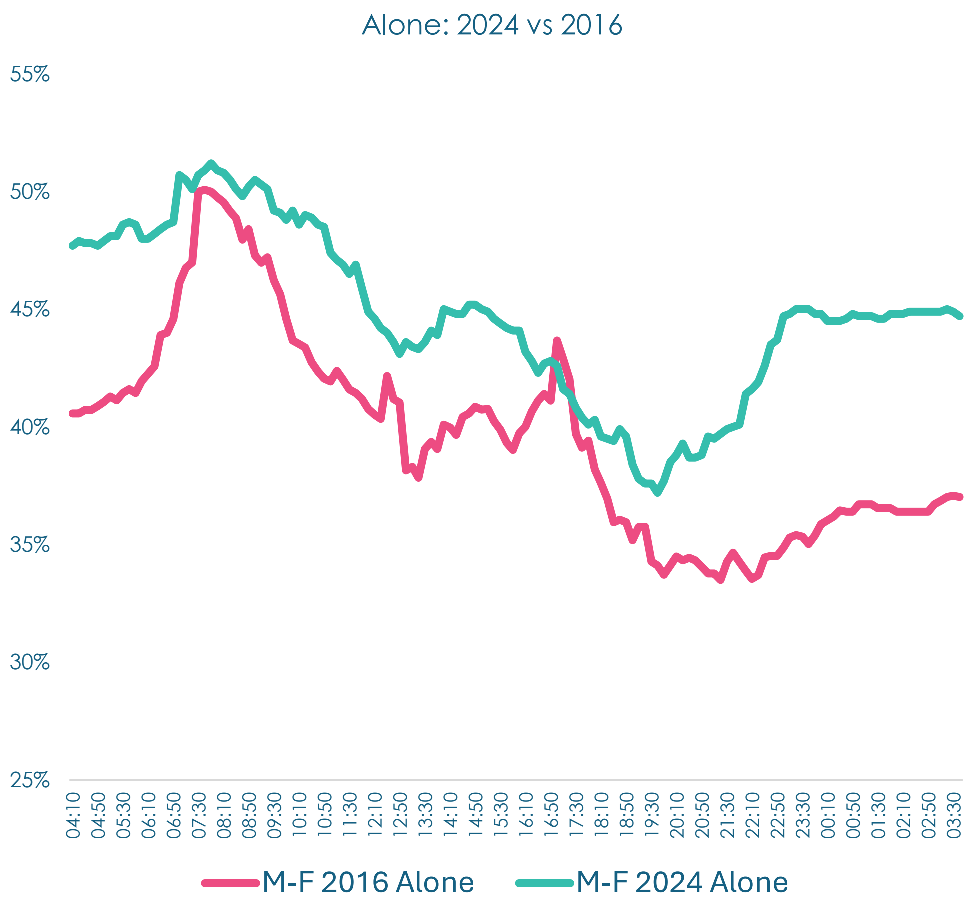
Location Home: Weekday average (2024 vs 2016)



Increased flexibility in working life means that in 2024, individuals are more likely to be at home on weekdays compared to 2016.

Source: Trajectory 2024/2016

PEOPLE ARE INCREASINGLY SPENDING MORE TIME ALONE, BUT ARE NOT NECESSARILY LONELY



Source: Trajectory 2024/2016

18-34 **62%** PEAK

55+ **46%** PEAK

35-54 **52%** PEAK

Weekdays see 18-34 year olds more likely to spend more of the day alone than any other demographic group.

Average time alone per day (hrs)

8.5 2016

10.6 2024

5% 2016

7% 2024

% regularly lonely

Source: Bobby Duffy, Policy Institute at King's College London

DECREASE IN TIME WITH OTHERS

There has been a marked decline in the time we are spending socialising with others, a trend we have seen reflected in other studies. Work from Opinium shows that the average UK adult socialises or goes out with friends, colleagues, or their wider social circle around 50 days a year. Over half (52%) of adults meet with friends, colleagues, or their social circle only once a month or less. Two in five (39%) say their financial situation limits their ability to socialise as often as they would like.

Research shared by agency Modern Citizens reveals that more than one in five (22%) Britons say that their social circle has become smaller in the last three years.

Source: Trajectory 2016 / 2024. https://www.opinium.com/socialising-in-the-uk-how-adults-connect-and-whats-holding-them-back/
https://lbbonline.com/news/more-than-1-in-5-britons-say-that-their-social-circle-has-become-smaller-in-the-last-3-years

CHANGES TO LEISURE

CHANGES TO LEISURE…

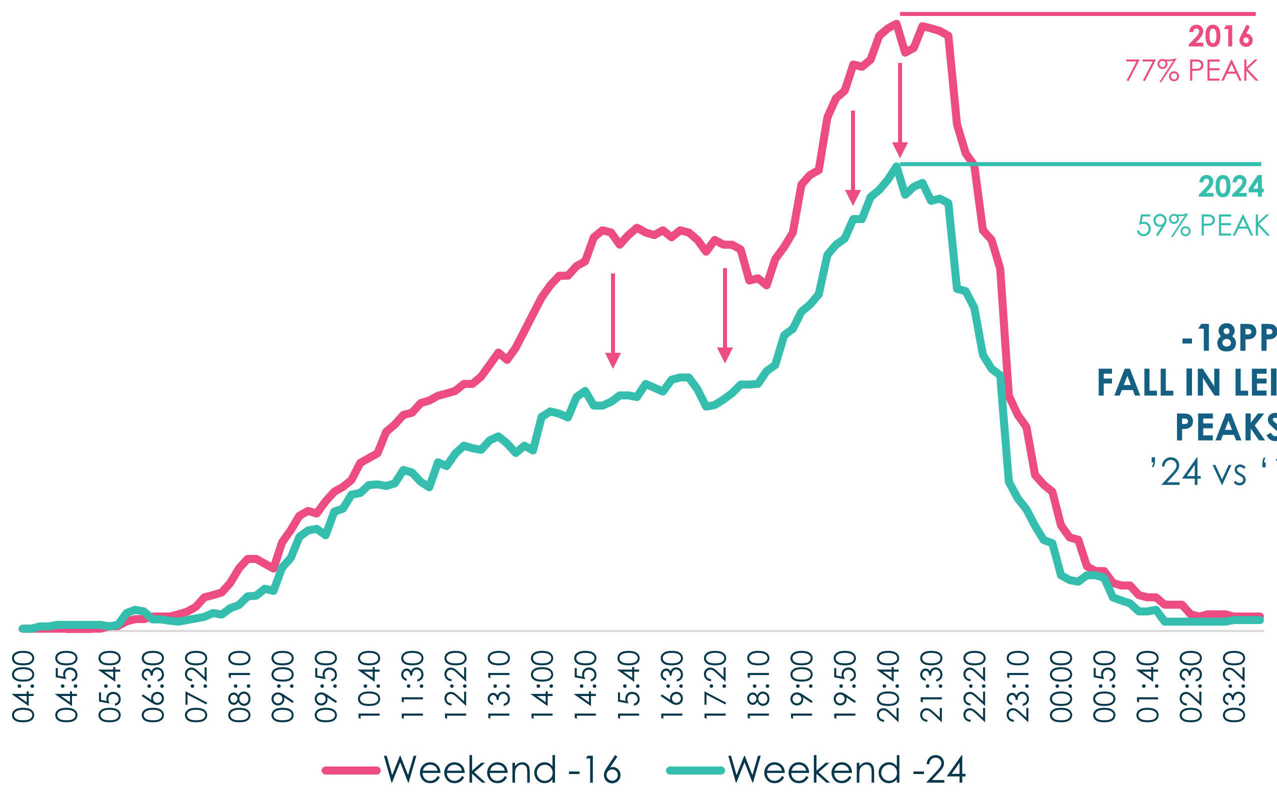
1 LESS TIME SPENT ON LEISURE

2 INCREASES IN HOME ACTIVITIES

3 DECLINE IN PERSONAL LEISURE

LEISURE ACTIVITY DECLINING

Leisure: 2024 vs 2016



-18PP FALL IN LEISURE PEAKS
'24 vs '16

46 MINUTE
fall in the average daily time spent on entertainment, socialising and other free time activities.
Source: ONS March 2020 vs March 2023

WHY?
Less disposable income available for out of home leisure.

Distractions are dampening demand for in-home leisure.

Source: Trajectory 2024/2016

IMPACT ON IN-HOME LEISURE HABITS

Average time spent on food preparation and eating has risen by 14% from 2016 to 2024. Greatest increase in the proportion of people prepping food is on a SATURDAY! (+6PP)

Time spent has risen from ca 1.5 hours in 2016 to over 2.8 hours in 2024, an increase of more than 80%. This growth reflects efforts to improve home comfort and appearance, and the changing nature of socialising – accelerated by the pandemic. More people are also doing these tasks during long weekends, aligning with flexible work patterns.

+14%
Increase in average time on food preparation / eating

+80%
Increase in average time spent on DIY / home maintenance / gardening

Source: Trajectory 2024/2016

IMPACT ON LEISURE HABITS

-41%
Increase in average time on hobbies

-16%
Decrease in average time spent on exercise

Time spent on hobbies has declined, likely due to lower available income, while more people exercise but for shorter periods.

Source: Trajectory 2024/2016

IMPACT ON LEISURE HABITS

-60%
Decline in average time spent attending cultural events

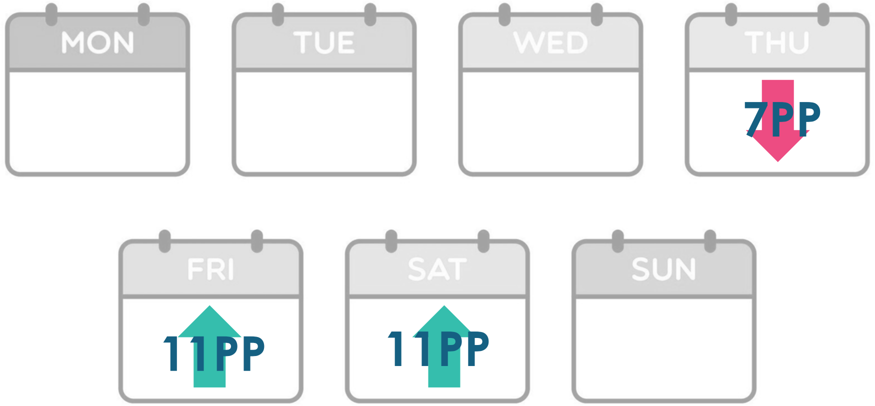
3PP
Decrease in the proportion attending cultural events - greatest fall on SATURDAY! (-6PP)

Source: Trajectory 2024/2016

IMPACT ON LEISURE HABITS – INCREASED REST AND RELAXATION

4.6HRS
PER WEEK
2016

6.1HRS
PER WEEK
2024



Our study shows that time spent relaxing has increased by over an hour and a half in the past eight years. Data also indicates more people rest on Fridays and Saturdays, with fewer resting on Thursdays. This maybe reflective of greater work flexibility – potentially evidence of Friday being worked at home; Thursdays signalling the end of the "at-work" week. It could also reflect a stronger focus on health and well-being, with rest being increasingly prioritised on weekends.

Source: Trajectory 2024/2016

ABOUT TIME

CHANGES TO OUR ENJOYMENT OF TIME

SIMPLE PLEASURES

1

GREATER CONTENTMENT?

2

OUTDOOR LEISURE STILL VALUED

3

GREATER ENJOYMENT OF SIMPLER THINGS

PEOPLE REMAIN HAPPY

2016

5.3

2024

5.5

Average enjoyment of activities has slightly increased over the eight years to 2024, even though overall life satisfaction may not have improved, indicating people might find more pleasure in their pursuits despite other pressures.

Source: Trajectory Time Use Research 2016 / 2024. Average Enjoyment (Scale 1 to 7 Where 7 = Highest) At Each Ten Mins

A CHANGED VIEW OF WORK?

This shows changes in average enjoyment ratings by activity. Most areas have increased, with notable upticks in some unexpected areas.

Average enjoyment of paid work has risen, possibly due to more flexible schedules.

Cleaning has become more enjoyable, perhaps as people spend more time at home.

Highest increase in enjoyment
Increase in enjoyment
Static / Decrease in enjoyment

Top 12 ranked by time spent – enjoyment by activity 24 vs 16.

Source: Trajectory 2024/2016

INCREASED ENJOYMENT OF FAMILY TIME

This ranking compares activity enjoyment to 2016, showing some changes. Cultural events (theatre, gigs etc) and dining out remain popular but with slightly less participation. Reading and family time have risen up the ranks, while hobbies and watching TV have declined.

Activities ranked by average enjoyment

CULTURE
#1
- up from 2

EAT OUT
#2
- down from 1

FAMILY
#3
- up from 4

EXERCISE
#4
- down from 3

DOG WALKING
#5
- up from 6

READING
#6
- up from 8

OWN KIDS
#7
- up from 11

WATCHIN G TV
#14
- down from 12

HOBBIES
#15
- down from 5

Highest increase in rank
Increase in rank
Decrease in rank

Source: Trajectory 2024/2016

ABOUT TIME

A WEEK IN REVIEW

THE WEEK

1

THE BLURRING OF THE WEEKEND

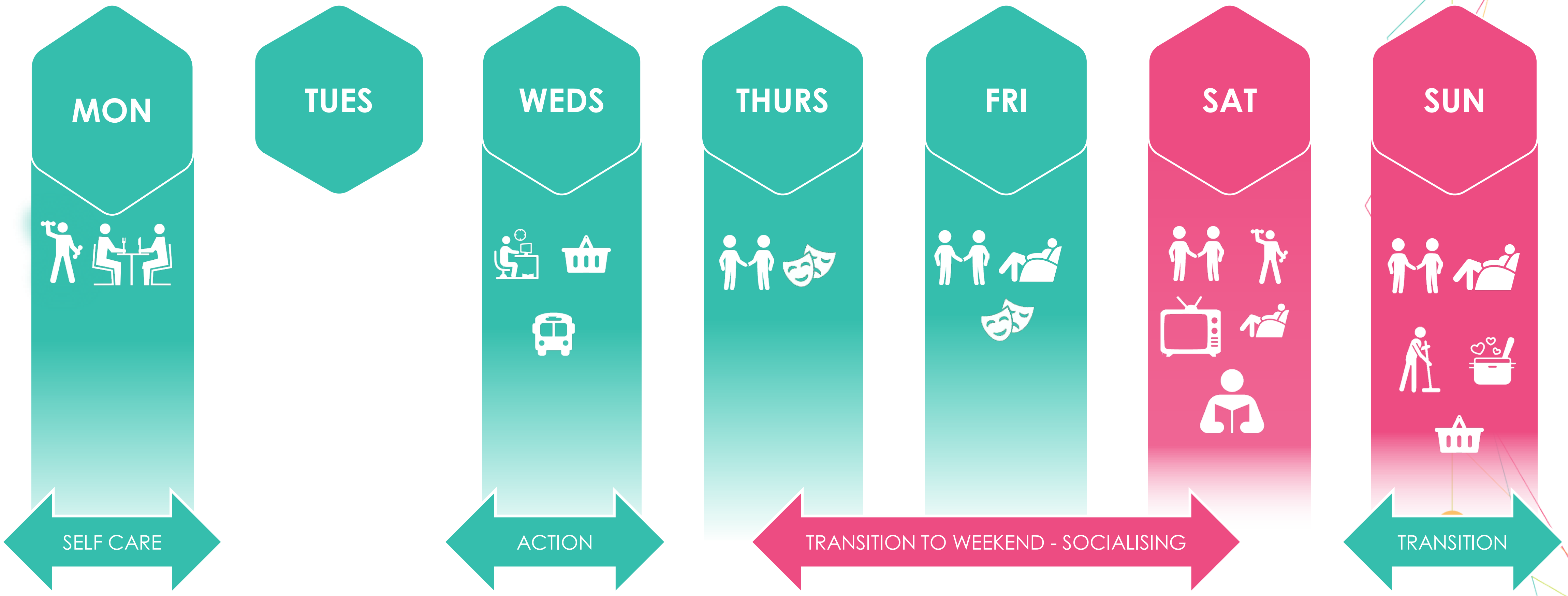
2

MOOD IMPROVES THROUGHOUT WEEK

3

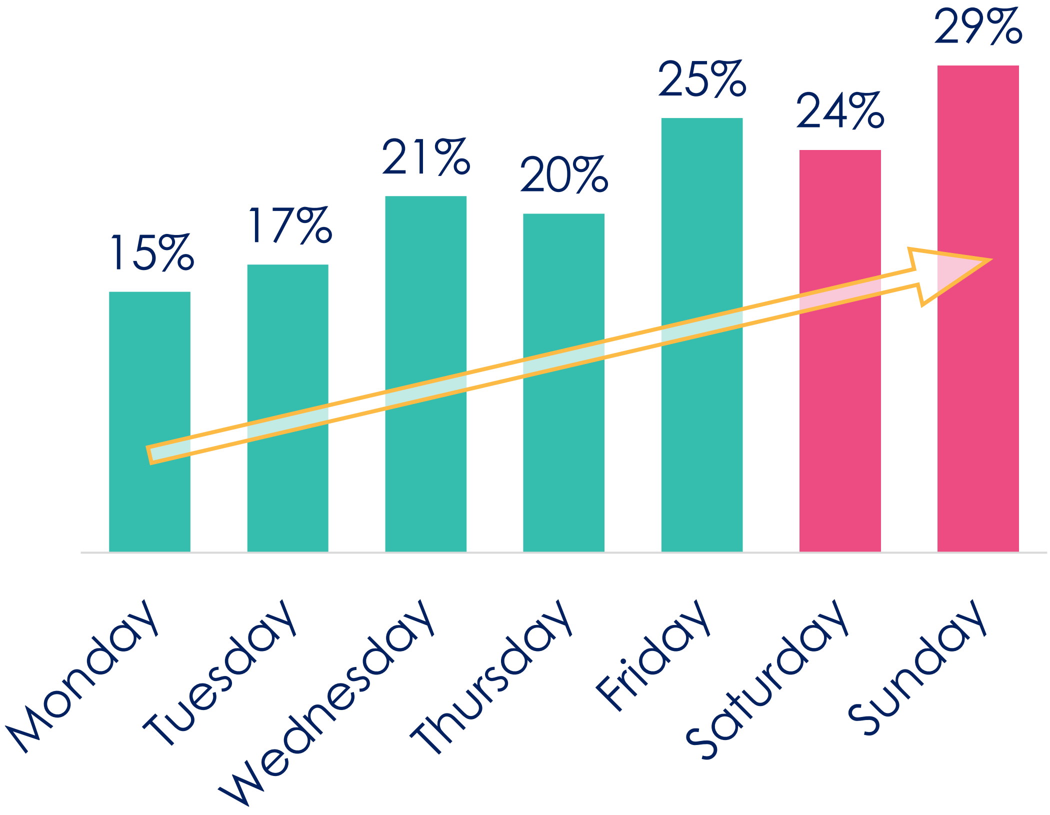
EARLY EVENINGS HOLD GREATEST ENJOYMENT

THURSDAY'S MARK THE TRANSITION TO WEEKEND ACTIVITIES



Source: Trajectory 2024.

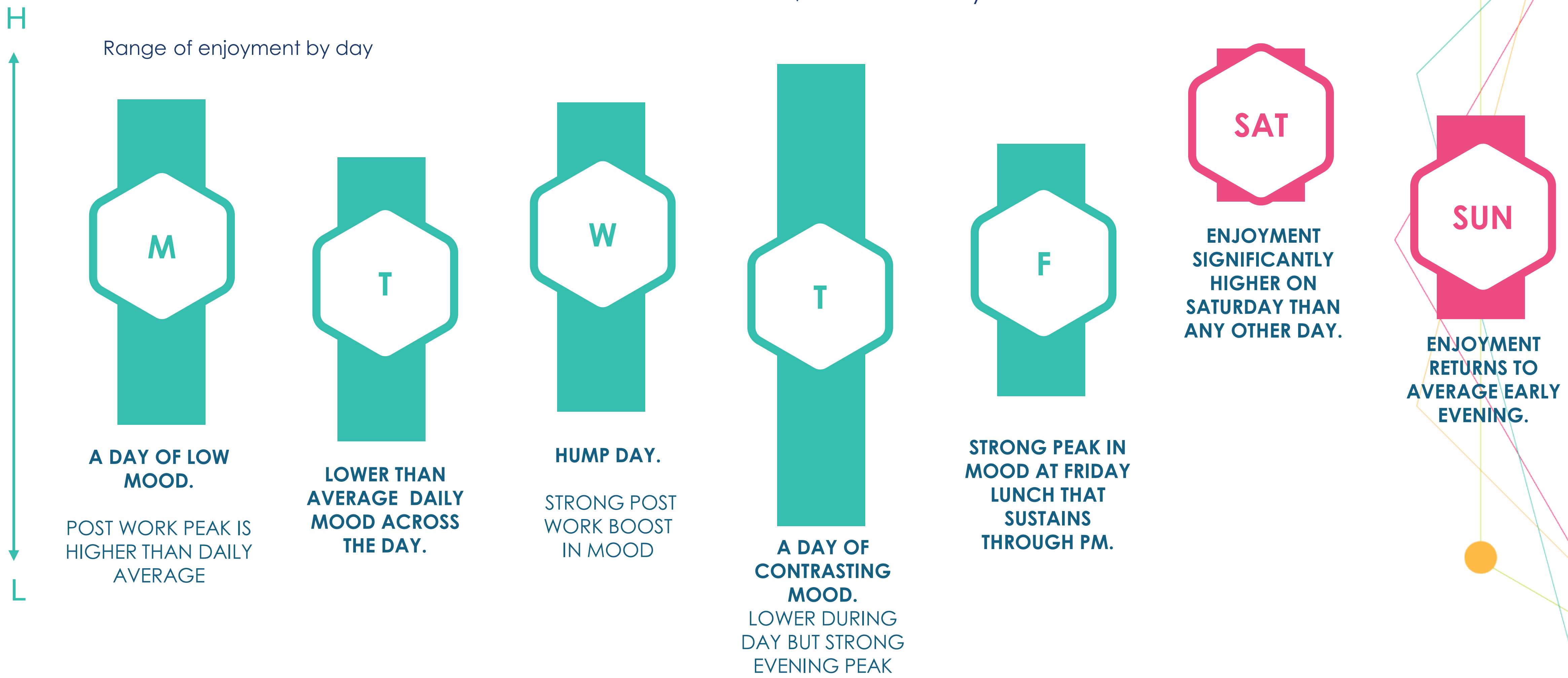
OVERALL FRIDAY-SUNDAYS ARE MORE PLEASANT DAYS



Source; Trajectory 2024. Overall, how do you feel about this day? (Very pleasant) Average: 22%

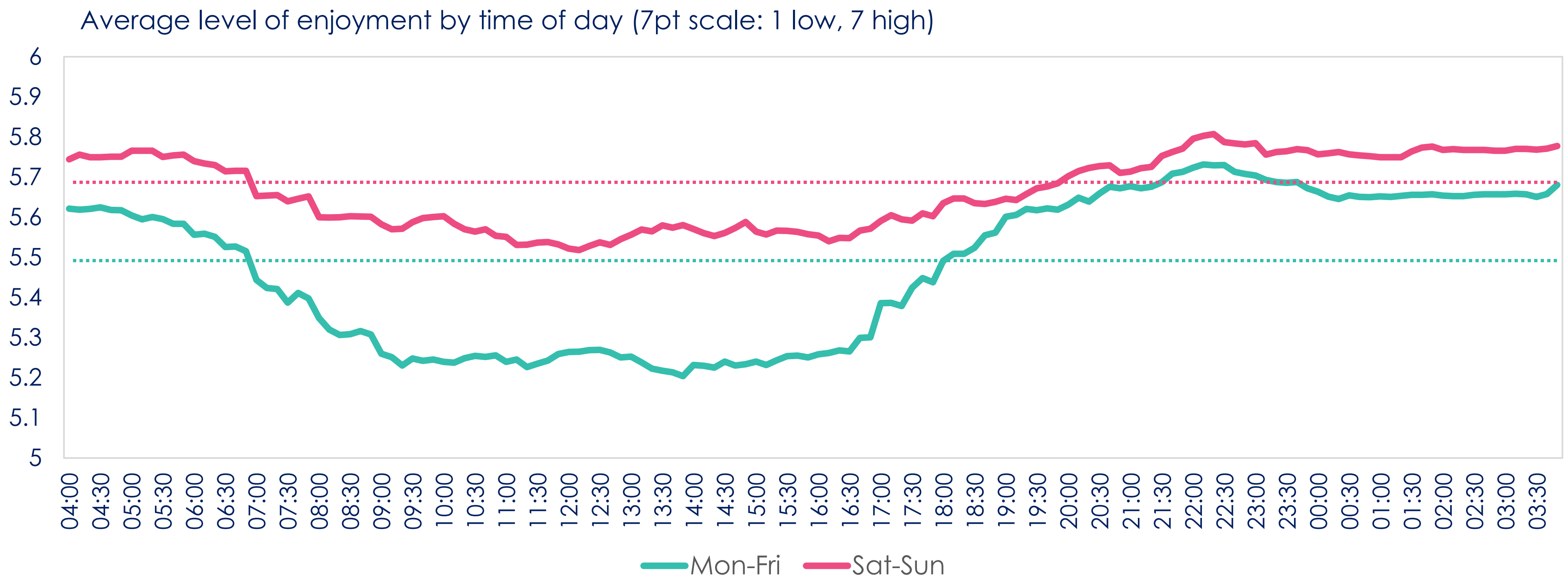
HIGHS AND LOWS OF THE WEEK

Average mood and average mood ranges vary throughout the week. Saturday and Sunday have the smallest mood variation, while Thursday shows the widest.



Source: Trajectory 2024

ENJOYMENT OF WEEKENDS CONSISTENTLY HIGHER THAN WEEKDAYS; ENJOYMENT OF DAYS BUILDS IN EARLY EVENING



Source: Trajectory 2024.

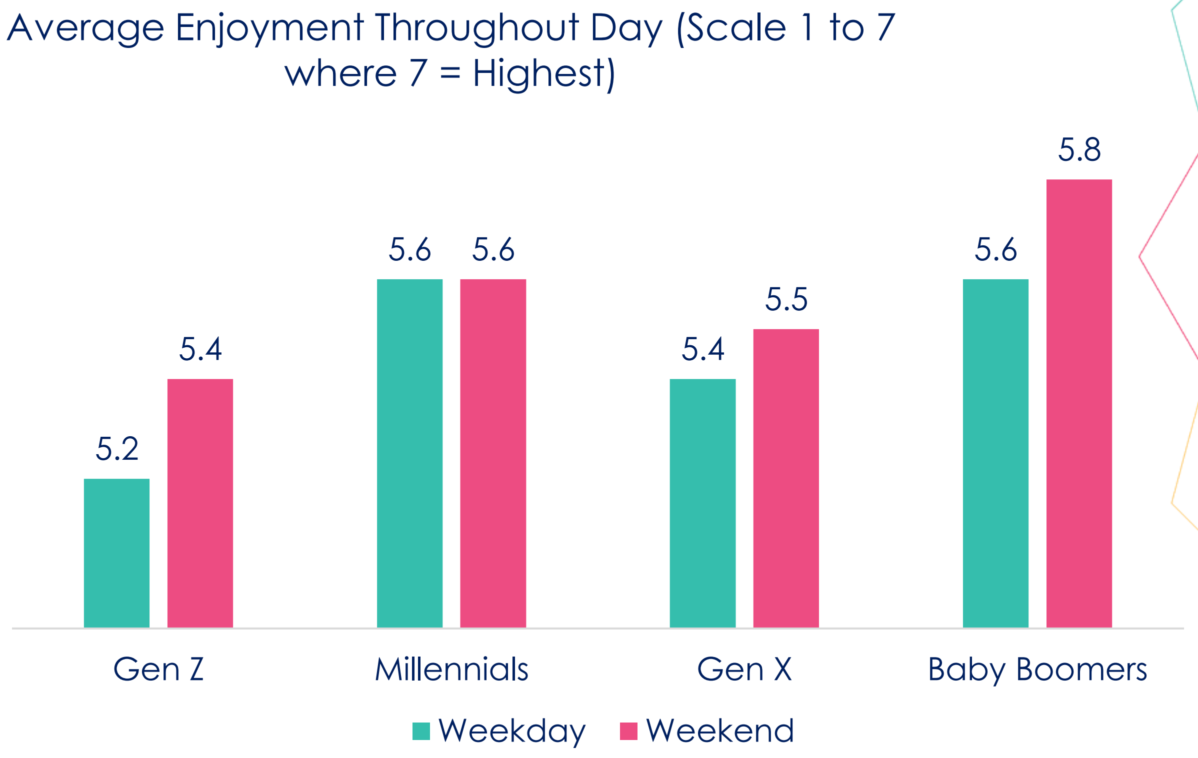
LIVING FOR THE WEEKEND? YOUNG AND OLD SEE GREATEST VARIATION IN MOOD (WEEKDAY vs WEEKEND)

Feelings about weekends differ by generation and behaviour.

One may have assumed that "boomers" would experience the least change in enjoyment between weekdays and weekends: given their life stage—they are generally afforded more freedom and financial stability—but weekends are noticeably more enjoyable for them. Similarly, and perhaps more expectedly, Gen Z show a significant boost in mood during weekends.

Although millennials are the largest generation in the UK, they face considerable pressure. This group experiences the smallest mood fluctuations between weekdays and weekends, likely due to work encroaching on their leisure time. Brands that provide time-saving solutions or help reduce daily stress are likely to resonate well with this demographic.

Source: Trajectory 2024/2016



THE AGE OF DISTRACTION & CAPTURING MENTAL AVAILABILITY

MENTAL AVAILABILITY

1

PEOPLE FEELING UNDER MORE PRESSURE

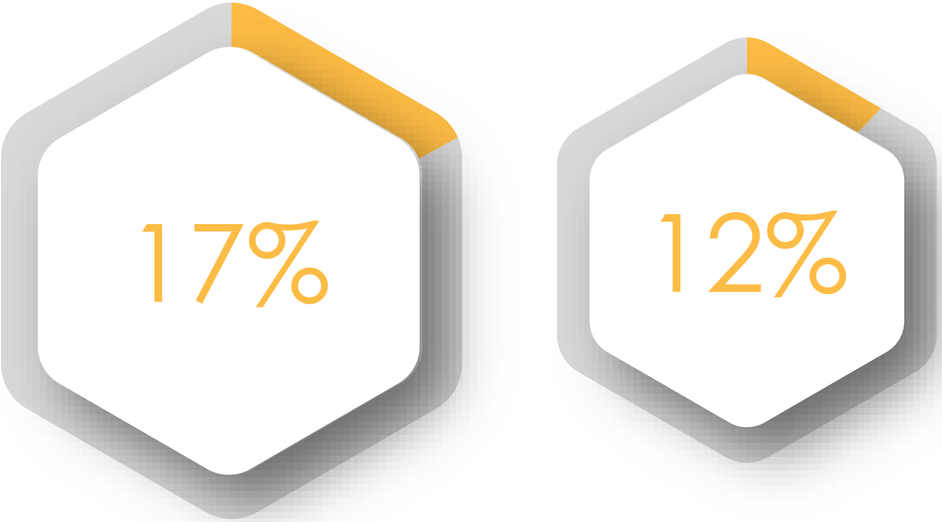
2

PEOPLE ARE INCREASINGLY DISTRACTED

3

SOME MEDIA DELIVERS HIGHER ATTENTION

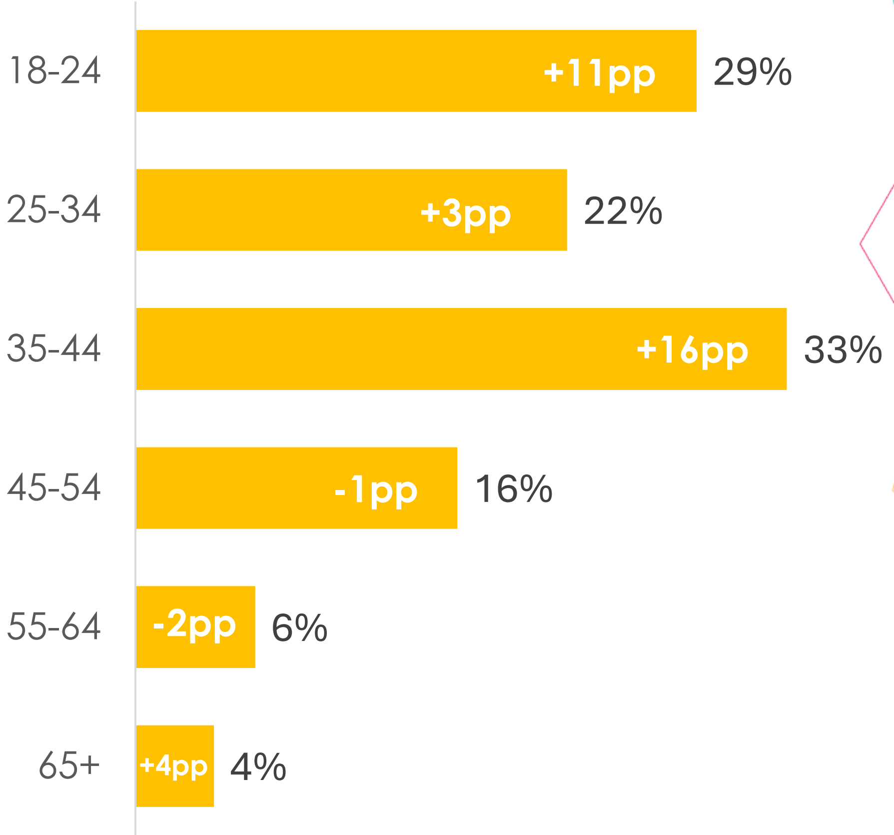
YOUNGER GROUPS FEELING INCREASED TIME PRESSURE



2024 2020

In the four years between surveys, it is apparent we are increasingly subject to or more likely to experience ‘stress’ or are feeling continually rushed; sentiment increasingly felt by those under 44.

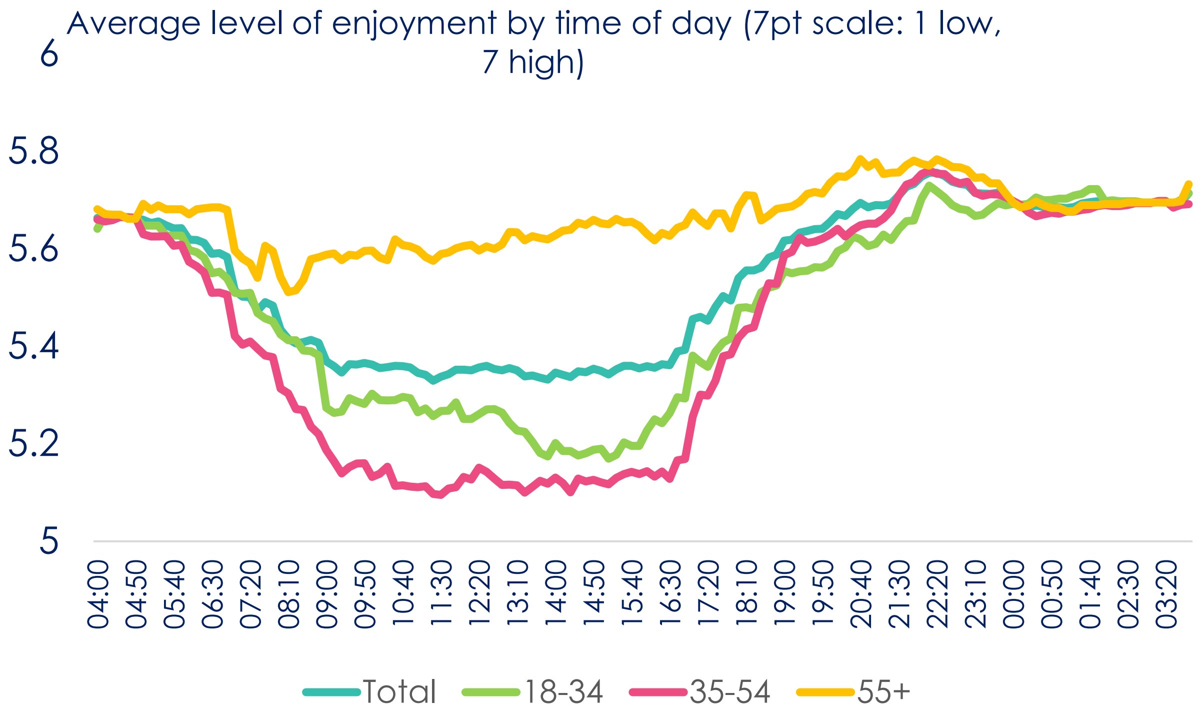
Always feel rushed (percentage point increase – ’24 vs 20)



Source: Trajectory 2024/2020. Q: In general, how rushed do you normally feel? (Always)

ENJOYMENT OF DAYS BY AGE IS MARKED.

35-54s ARE MOST LIKELY TO EXPERIENCE A WIDER RANGE OF MOOD & MORE LIKELY TO FEEL TIME PRESSURE



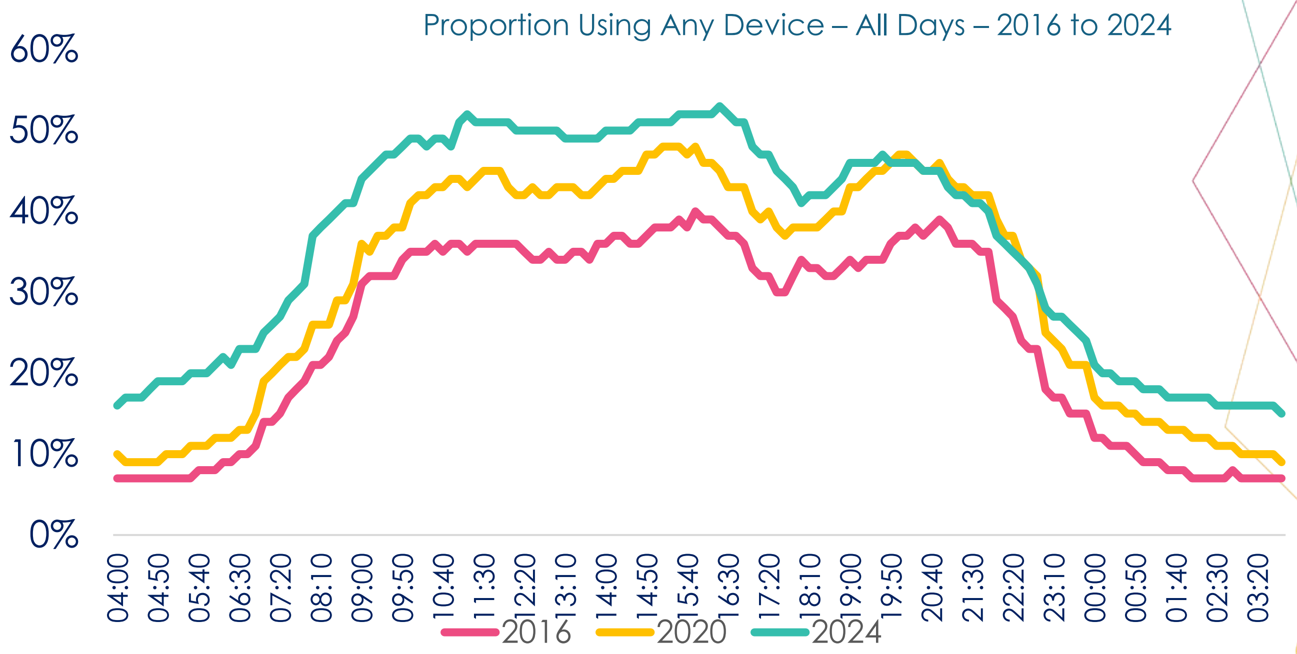
Older adults on average tend to report better moods throughout the day, likely due to having more free time and perhaps less financial pressure.

In contrast, middle-aged individuals, especially those aged 35-54, experience a wider range of emotions and we know there is a rising number reporting feeling constantly rushed.

Source: Trajectory 2024.

DEVICE USAGE IS CONTINUING TO INCREASE

THE PHONE IS A CONSTANT COMPANION

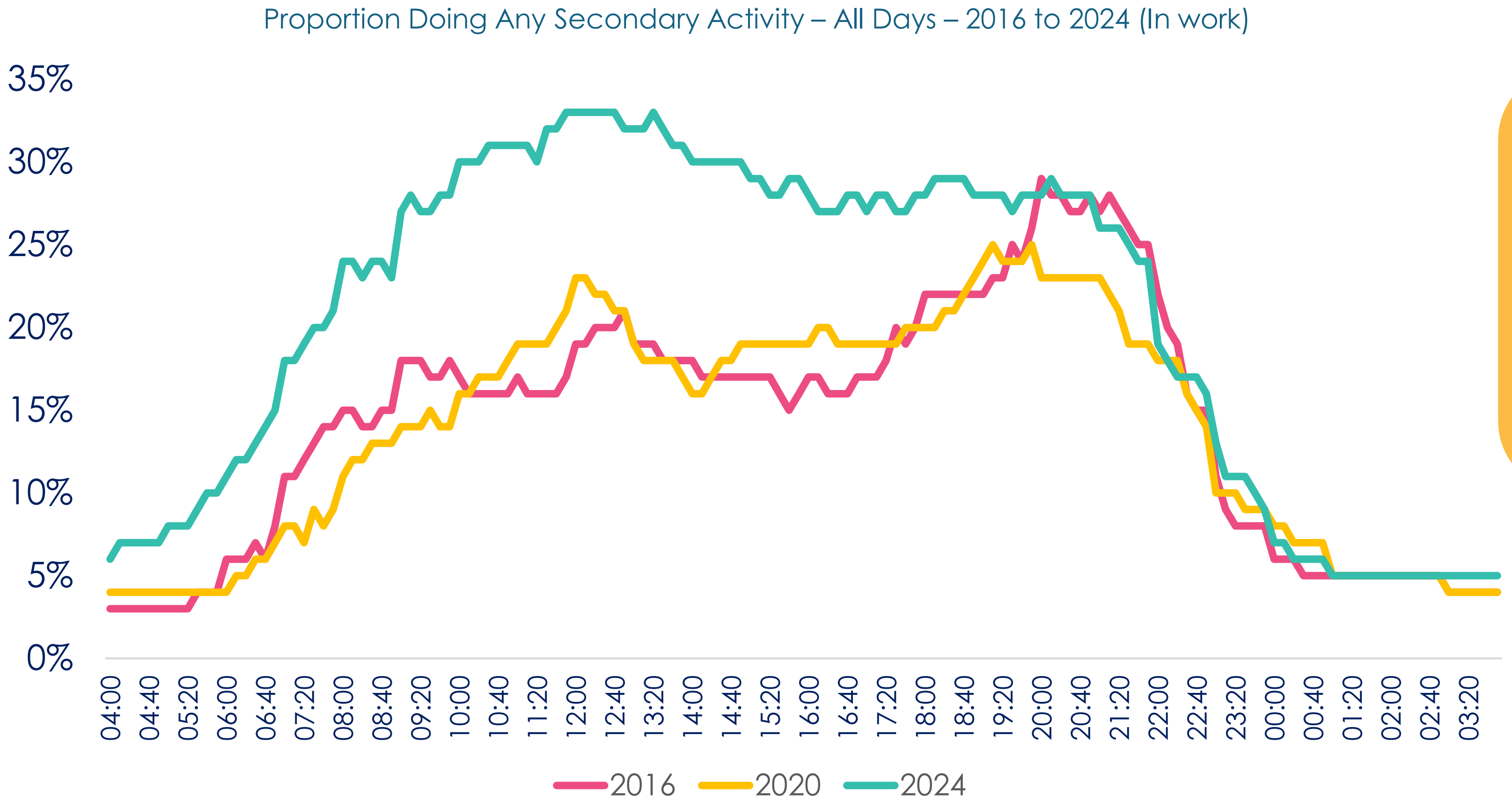


Device usage has grown throughout the day, making people more reachable – they are 'always on'.

However, this 'constant connectivity' means we must think carefully about addressing the challenge of standing out.

Source: Trajectory 2024.

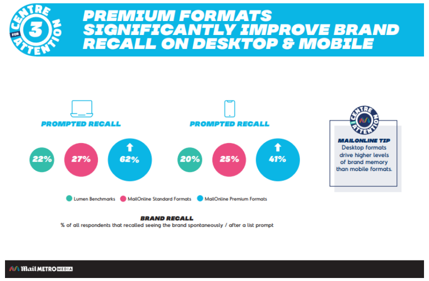
DAY TIME DISTRACTED – DRIVEN BY THOSE IN WORK



UK consumers are more distracted than ever, especially during the daytime. Device usage has reached its highest level in eight years, with distraction now peaking earlier in the day rather than in the evening. This is principally been driven by those in work.

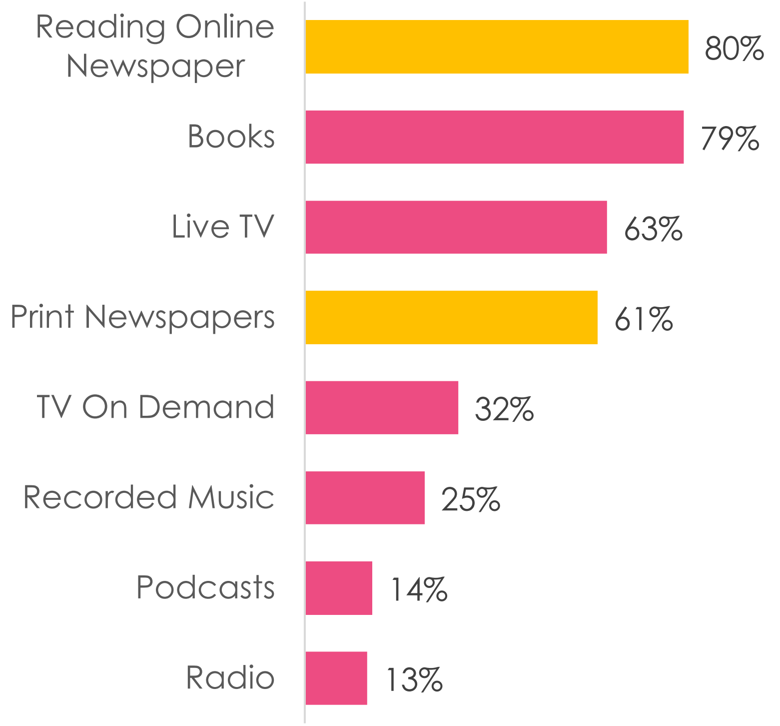
Source: Trajectory 2024.

HIERARCHY OF MEDIA ATTENTION



In our "Centre for Attention" work, we found the attention afforded to advertising broadly correlates with increases in brand metrics. The more attention an advert is afforded, the greater the uplift in brand recall and favourability to brand. There are advantages to being in a medium that delivers a consumer's full attention – especially when we have already seen that people are increasingly distracted.

Day part average (%) of activities recorded as primary activities



Source: Trajectory 2024.

ABOUT TIME

CONSIDERATIONS

Mail METRO MEDIA

CHALLENGE OF CONSTANT CONNECTIVITY

+5pp increase in device usage (2024 vs 2020) a 53% peak.

Considerations

Consumers are "always available" but attaining 'stand out' is difficult. People are increasingly multi-tasking, particularly those at work.

- When would the audience be most receptive?
- How can you cut through?
- What media and formats capture and hold attention?

Partner with media owners that can help you cut through and capture the attention of your audience. Mail Metro Media offers highly engaging advertising solutions across digital, social, print and audio.

CONNECT WITH CULTURAL MOMENTS

Cultural events (theatre, gigs etc) **ranked #1** in terms of enjoyment – increase from 2016.

Considerations

Advertising next to cultural events or moments that matter can be highly valuable, offering brands a unique opportunity to connect with a specific audience in a meaningful way. By aligning with the values and atmosphere of the event, brands can enhance their image and build positive associations.

In fact, attention increases by 23% on advertising that appears in culturally relevant editorial.

- How does your brand authentically connect to these?
- When is the right time and day to connect?

Partner with media owners that help put your brand at the heart of these cultural moments. Newsbrands are the original storytellers and 60% of our content is now lifestyle-based across all channels.

CONNECT WITH PERSONAL MOMENTS

People increasingly enjoy spending time with family members but have seen a **40% decrease in time spent** with others.

Considerations

People are feeling greater joy from spending time with others (particularly those close to home), despite increased time connected to devices and alone.

- Consider how you embody family and close personal connections to cut through?
- How does your brand authentically celebrate personal connection?
- Consider how community or togetherness can be reflected in creative executions or levelled in appeals?

Consider media owners who can connect with audiences in shared moments, in and out of households. Mail Metro Media covers the full gamut of family life reaching twenty-three million parents; two-thirds of millennials; and four-fifths of baby boomers.

BE SENSITIVE TO MOOD – AUTHENTICALLY EMPATHISE

Mood is lower in the week- hitting a low at 13.50 on a Thursday. Weekends sees people more buoyant with peak mood at 22:20 Saturday. Peak enjoyment across most days occurs early evening.

Considerations

Moods fluctuate by day of week, by time of day, and by demographic.

Whilst there are benefits to reaching people in positive mindsets, this is not always possible.

Brands that can recognise stressful moments and authentically empathise can also stand out.

- How can you capitalise on moments of high mood?
- How and when could you be empathetic to low consumer mood?

Not everyone experiences identical days or weeks. Understanding the range of different pressures by demographic can help you tailor messages more effectively and capture mood. First party data can help day-part targeting and help add real 'oomph' to sequential messaging. Mail Metro Media collects 200bn data points per month so are well placed to effectively target consumers by mood.

ABOUT TIME

CONSIDER DECISION CONTEXT

From our own data we see high value sales make up a great proportion of sales towards the end of the week – 2 in 5 sales are high value on a Monday compared to Monday where 1 in 5 is high value.

Considerations
Our commerce data suggests considering how social context affects decision making. High-cost purchases may benefit from decision makers being available, like on weekends when household discussions happen.

Low-cost items might sell better when people seek quick rewards or "pick me ups."

Consider the decision context in priming?

Purchase decisions are frequently driven by context. Consider media partners who have a continual presence across a week and day-part to fully capitalise on this. Whether it is pick me up or high involvement purchase, Mail Metro Media can offer proximity to purchase decisions – either when out and about, or while people are in their homes.