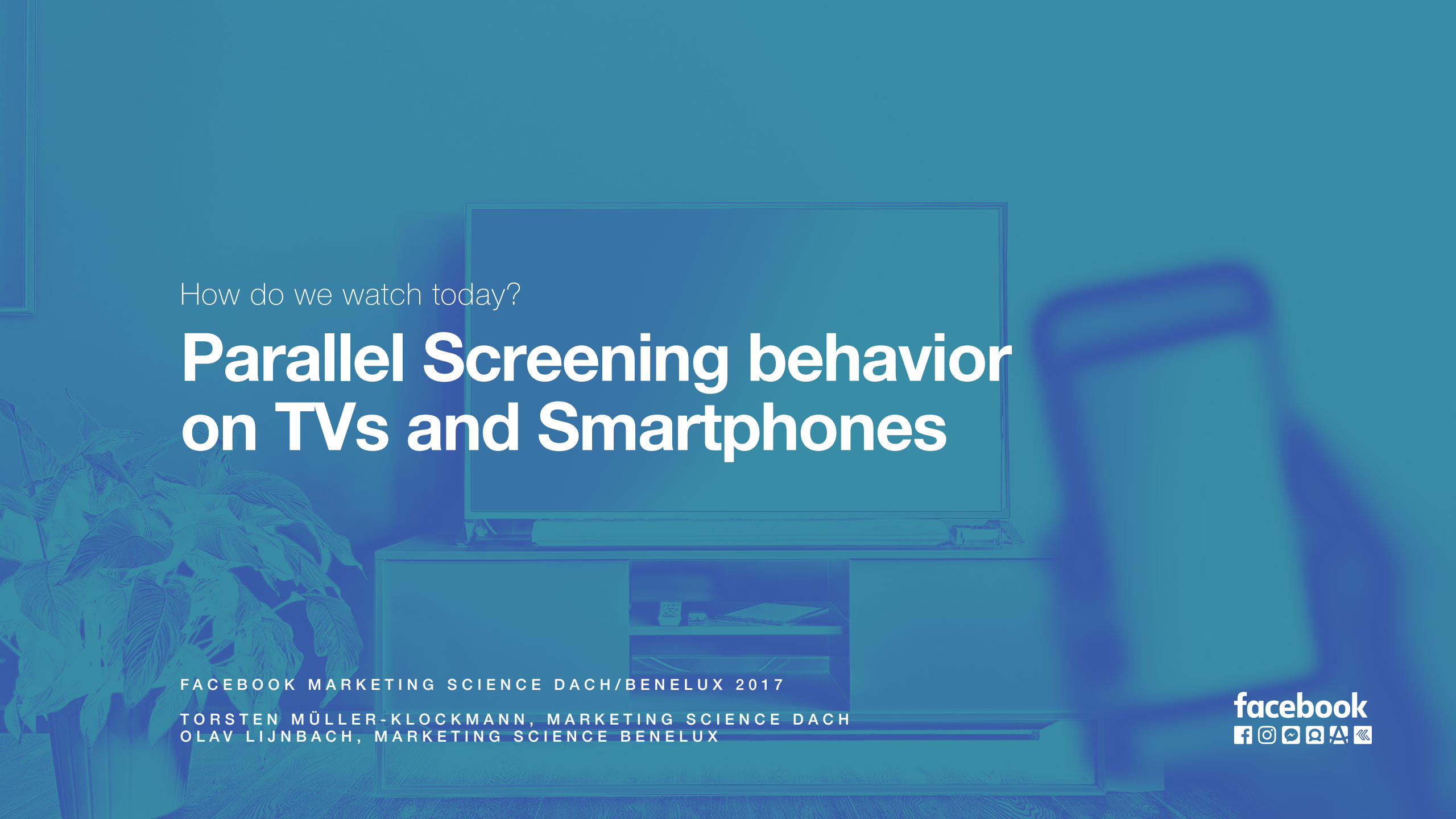

How do we watch today?

Parallel Screening behavior on TVs and Smartphones

FACEBOOK MARKETING SCIENCE DACH/BENELUX 2017

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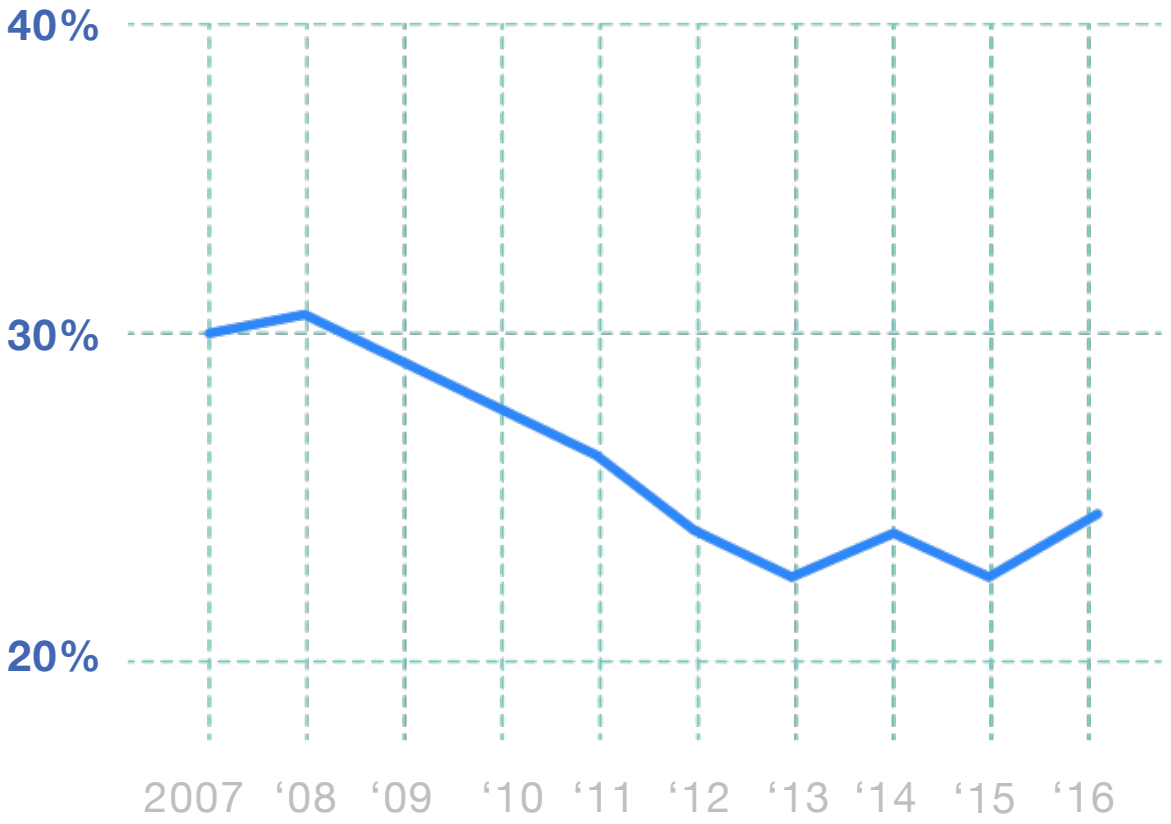
facebook

Observation

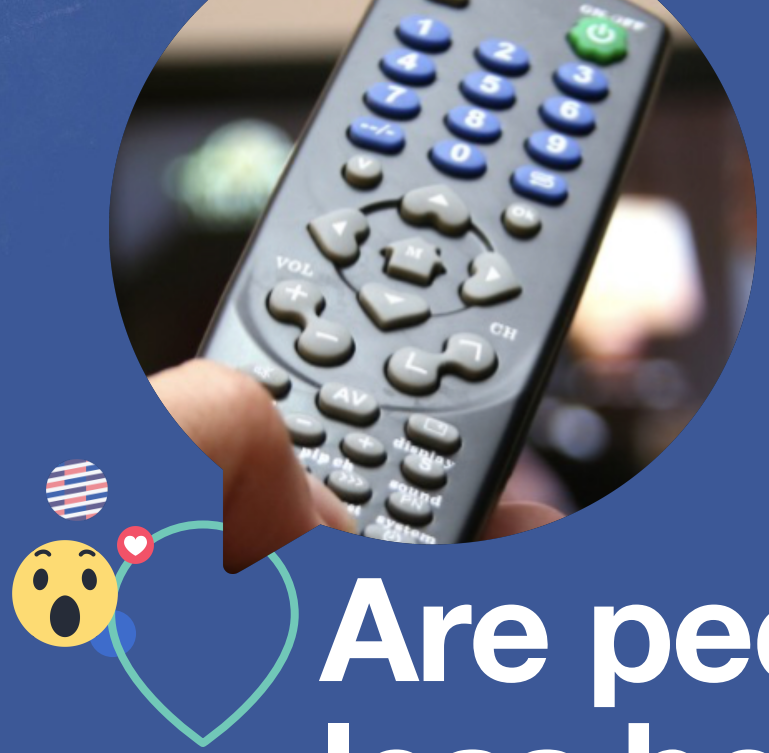
Less zapping during commercial breaks since 2009

% zapping 18:00 – 24:00 hour (March)



The percentage of people who switch to another TV channel. This is based on the comparison of the average viewing density (=number of viewers) of commercial breaks and the average viewing density of TV programs before and after these commercial breaks. Because it is based on the average viewing density, quick switchers through various TV channels will have little impact on the outcomes for those various TV channels.

Source: TV Scope /AGF



Are people changing channels less because they change to their digital device during commercial breaks instead?



Quantitative analysis of parallel screening behavior

MEC / GfK Crossmedialink

Source: GfK Cross Media Link Panel research. Meas. programmatic TV viewing vs. mobile device usage during ad breaks; Mar, May, Jul, Nov 2014, 2015 and Mar, May, July 2016. N=3.631 / Avg. 4,600 observations/mo.; German adults age 20+.

Objectives

Questions

- Do people use their digital devices during commercial breaks and what is the development since 2014?
- To what extent do people use their digital devices during commercial breaks in terms of reach, % time spent and frequency and how does this compare to digital device usage during TV programs?

Selection of commercials breaks and programs

- Minimum of 1 minute length of commercial breaks
- Comparison with program snippets of 4 minutes during the break
- In the comparisons usage in March, May, July in 2014, 2015 and 2016 are analysed.

Sample

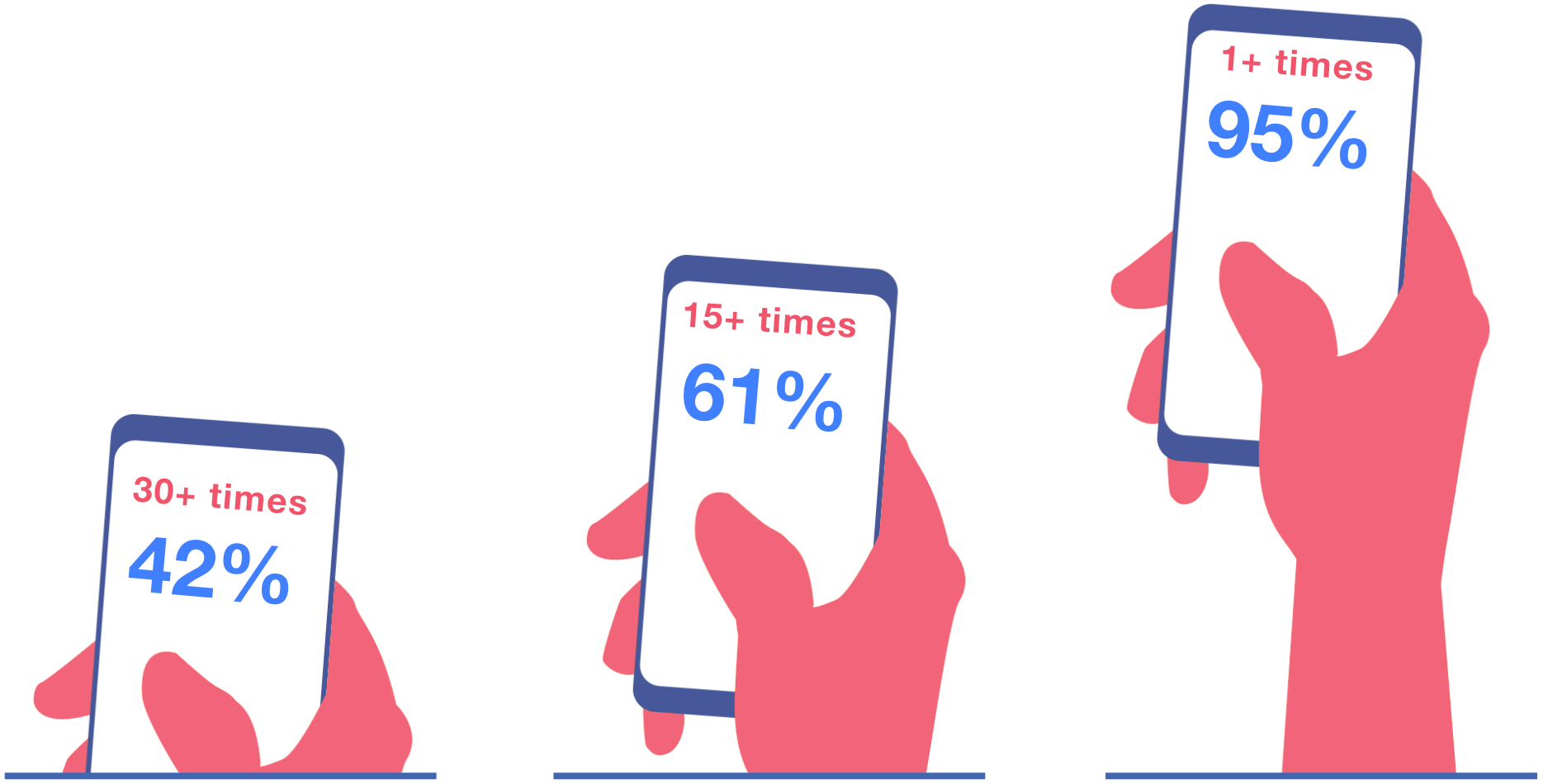
- 432-1249 respondents per month in Germany
- Representative according to age and gender in the German population

Source: GfK Cross Media Link Panel research. Meas. programmatic TV viewing vs. mobile device usage during ad breaks; Mar 2014: N=432; May 2014: N=674; Jul 2014: N=817; Mar 2015: N=502; May 2015: N=482; July 2015: N=1144; Mar 2016: N=1188; May 2016: N=1249; July 2016: N=1194, German adults age 14+.

Smartphone break

In 2016 42% of Germans surveyed use a digital device daily during commercial breaks

Reach:
Percentage of participants using their digital device during commercial breaks in one month

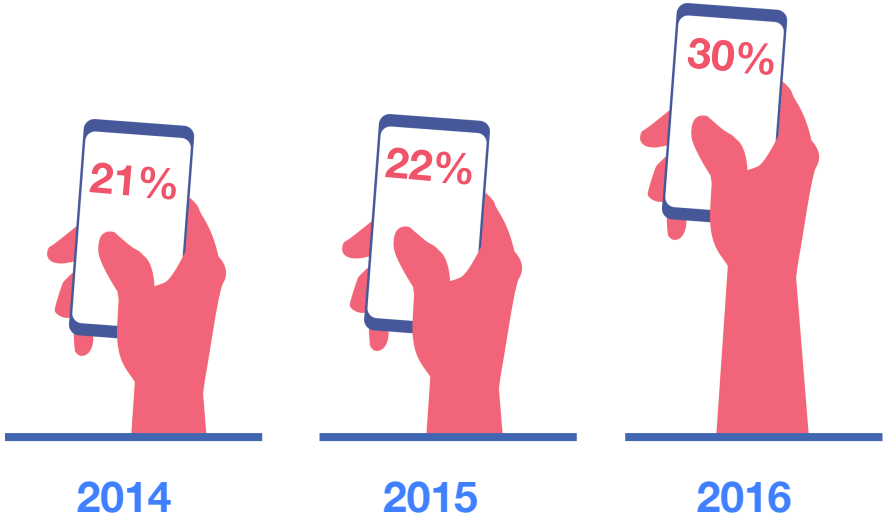


Source: GfK Cross Media Link Panel research. Meas. programmatic TV viewing vs. mobile device usage during ad breaks; Mar 2014: N=432; May 2014: N=674; Jul 2014: N=817; Mar 2015: N=502; May 2015: N=482; July 2015: N=1144; Mar 2016: N=1188; May 2016: N=1249; July 2016: N=1194, German adults age 14+.

Switching to mobile during commercials increases

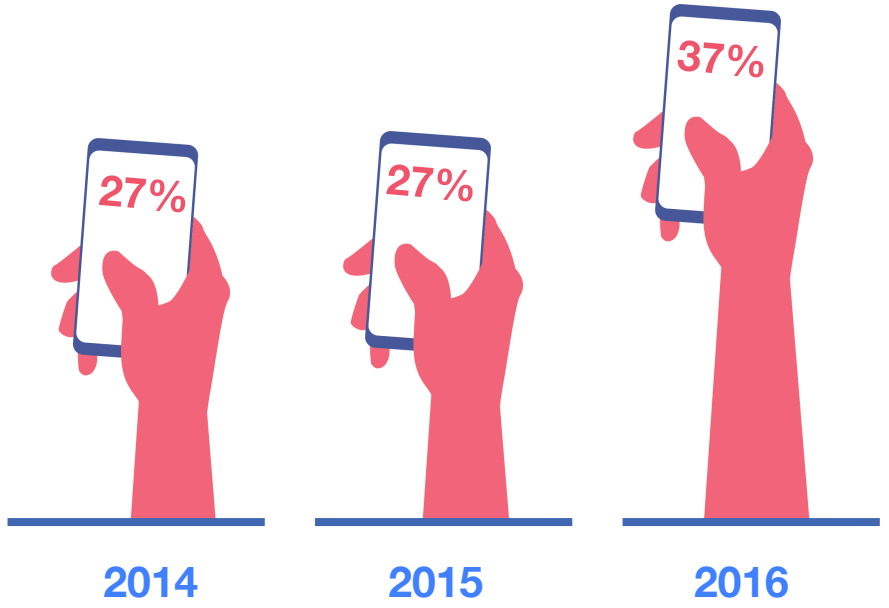
Among Germans surveyed, the number of people using their device during commercial breaks strongly increased in 2016. Percentage of time spent and frequency are also on higher levels than previous years

Percentage of time spent using digital device while watching TV commercials

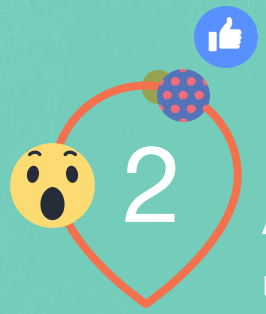


If people switch to their digital device during a commercial break, they are on for 3:20 or 78% (avg) of that commercial break (Nov 2015-Jul 2016)

Frequency: **Percentage of watched commercial breaks** and/or TV programs in which digital device is used



Source: GfK Cross Media Link Panel research. Meas. programmatic TV viewing vs. mobile device usage during ad breaks; Mar 2014: N=432; May 2014: N=674; Jul 2014: N=817; Mar 2015: N=502; May 2015: N=482; July 2015: N=1144; Mar 2016: N=1188; May 2016: N=1249; July 2016: N=1194, German adults age 14+. 95% significant



Attention paid to TV vs. Smartphones

Annalect Eyetracking

Background and Methodology

The aim of this study is identifying **differences in usage and attention between TV and Smartphones**, with a particular **focus on Facebook users.**

To assess this assumption a group of **55 people (age 14 to 49y)** was recruited. The goal was to observe **their natural media usage via eye-tracking over a span of one and a half hours at home** to get a realistic impression of their media usage in a familiar environment.

The recruitment focused on people who use Facebook on a daily basis. Additional criteria were Facebook usage on Smartphone and watching TV at least 3 days a week for a minimum of one and a half hours.

The Eye-Tracking was conducted from 23th June to 26th July 2016.

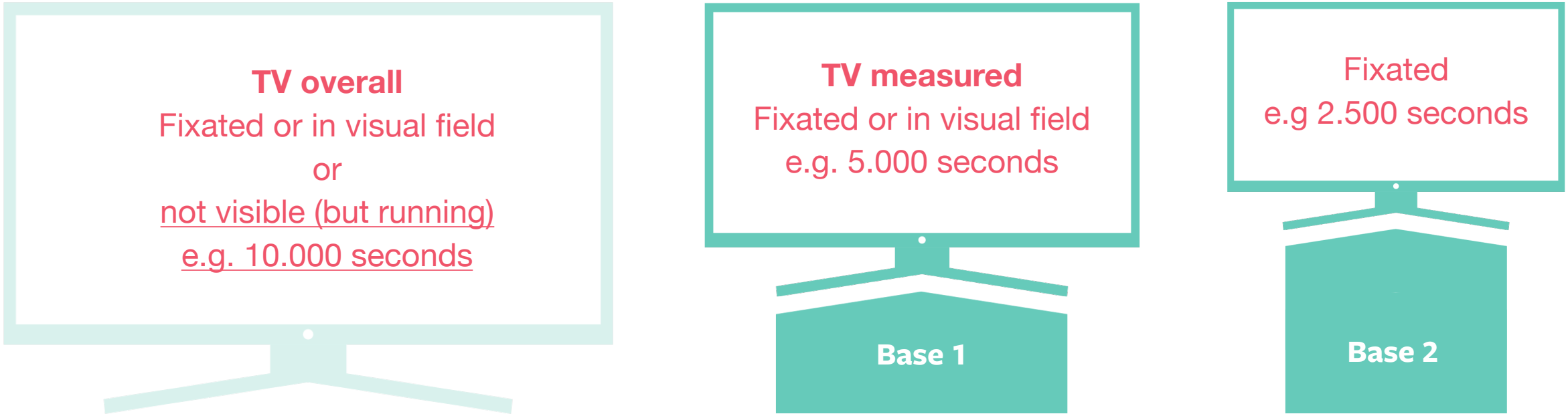
In order to get detailed insights about the participants behavior key events were defined. Those events were split into **fixated and in-visual-field events. As a result 90 possible events were identified and coded for the eye-tracking.**

For example each time a participant focused on the TV program this was coded as a *fixated contact* with TV program. If a device or an event was in the surrounding it was coded as a *visual field event*.

A human eye is able to focus only one object at a time. That is why only one fixated event can occur at a time. On the other hand it is possible to have multiple events in your visual field. For example: The participant is focusing the TV program. She fixates the TV program and has her Smartphone and PC in her visual field.

Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.

What we can report on



The evaluation is based on the seconds where the devices were „At least in visual field“. **Seconds of „TV is running, but not in visual field were not measured. As a consequence the fraction of TV fixation of running time is an over-estimation.**

For example: 2.500 fixated seconds to 5.000 seconds where TV is in visual field = 50% share of fixation. If TV was on for 10.000 seconds (we don‘t have this information) we would have just a 25% share of fixation.

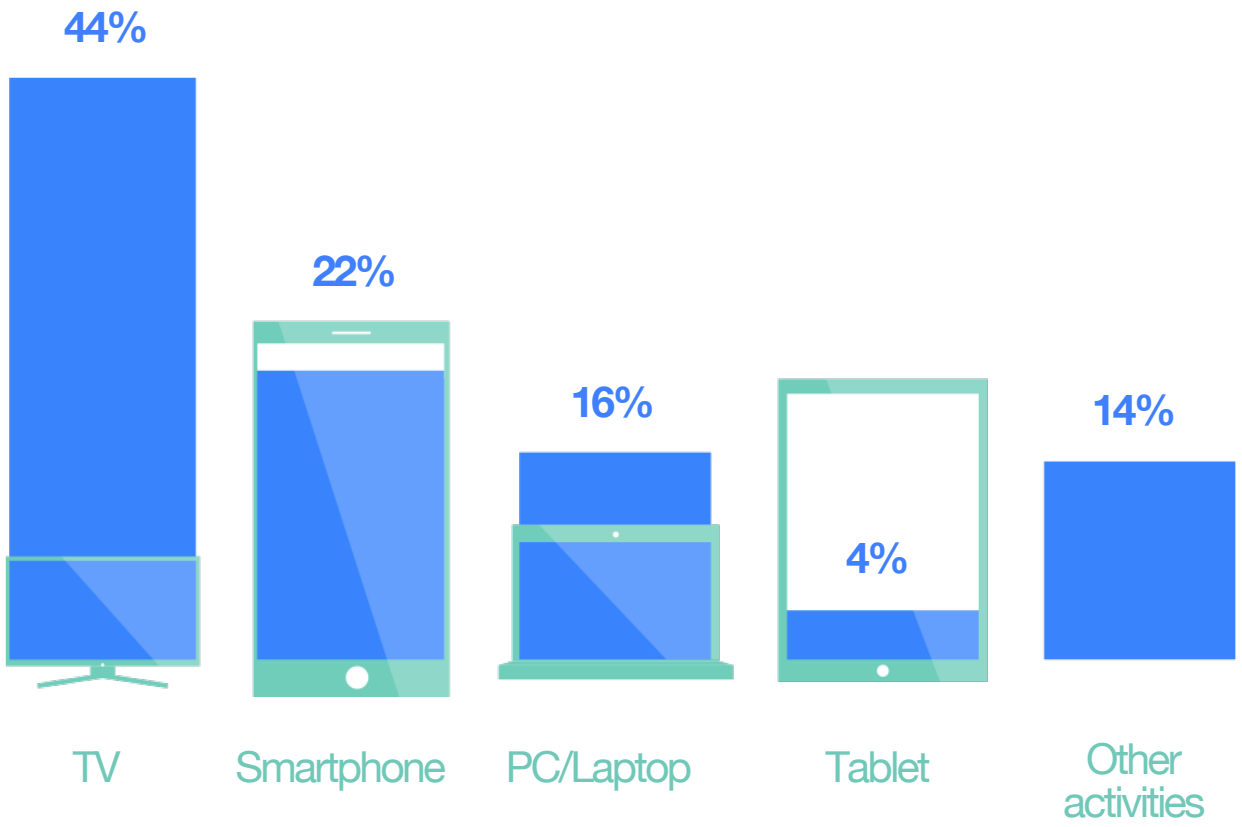
We coded events that were at least 0.25s long

Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.

Total share of attention

TV was the device with the most recorded focused time. It was focused 44% of the total fixation time recorded. Tablet was the device with the least recorded focused time representing only 3.8% of the total recorded fixation time.

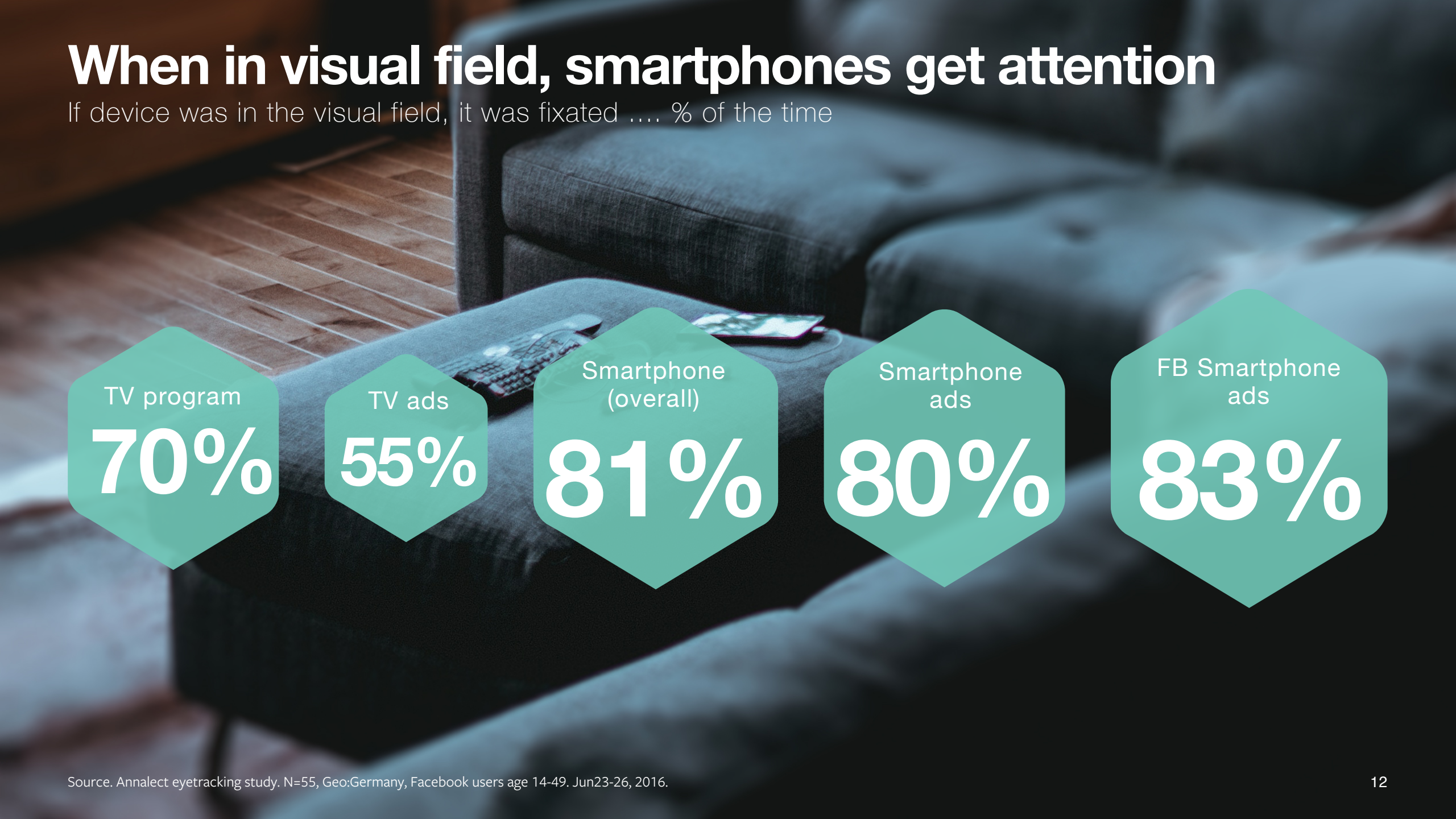
Other activities like position changing and conversations were represented 14.4% of total recorded fixation time.



Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.

When in visual field, smartphones get attention

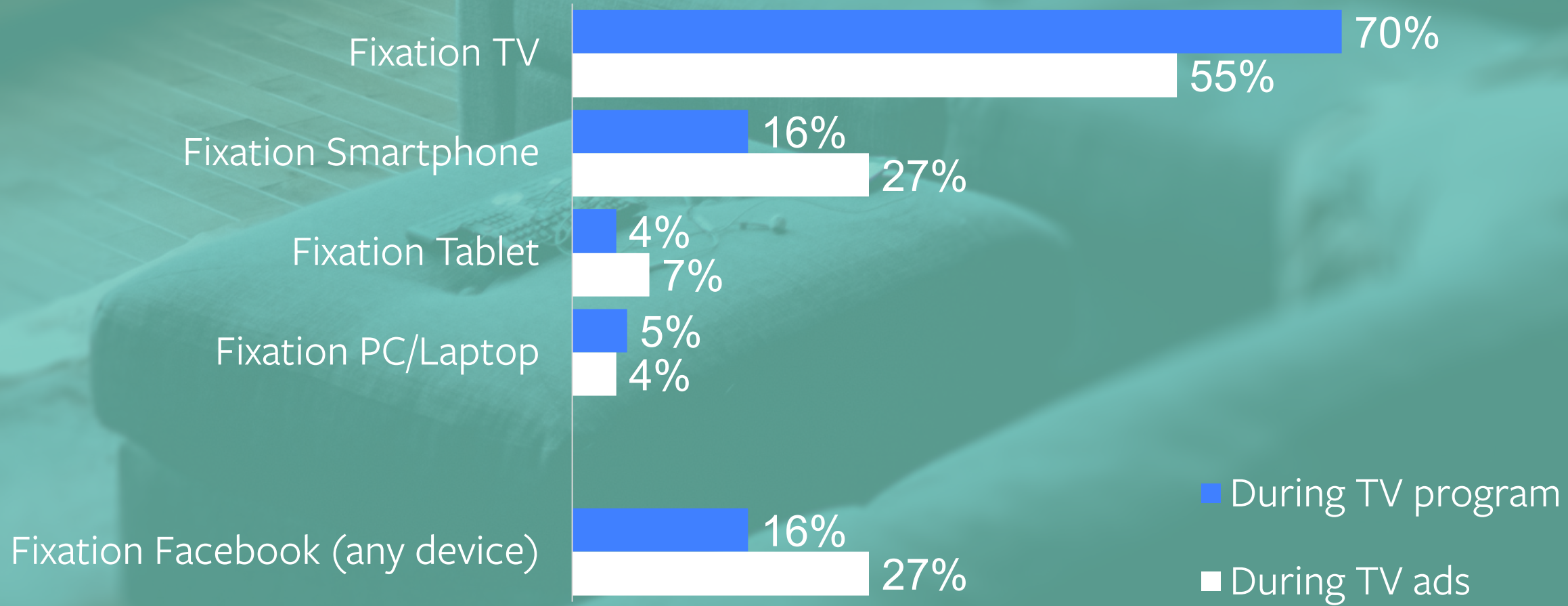
If device was in the visual field, it was fixated …. % of the time



Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.

Focus when TV is in visual field

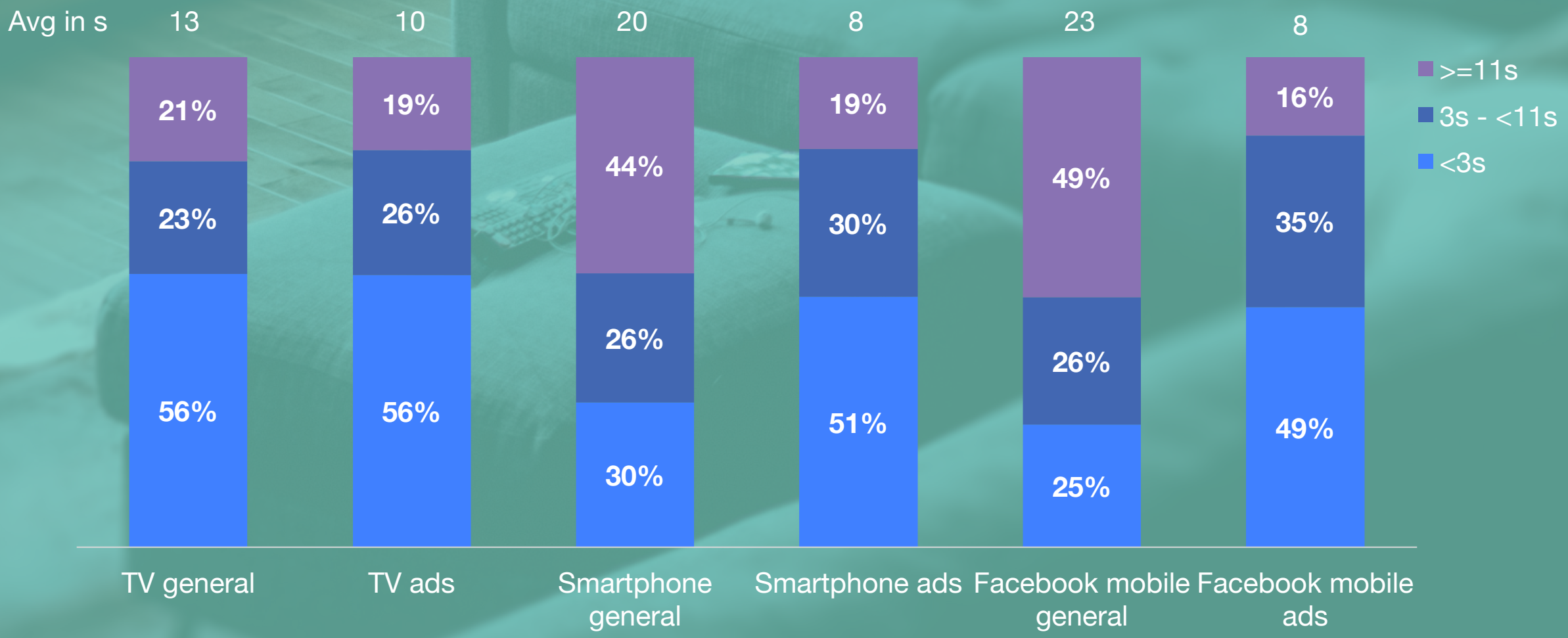
27% of the time TV ads were on, participating FB users were using their smartphone



Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.

Duration of fixations

If smartphones are fixated, attention is usually much longer than for TV.
Ad fixations are slightly shorter for smartphones, however, TV ads are usually much longer than mobile.



Source. Annalect eyetracking study. N=55, Geo:Germany, Facebook users age 14-49. Jun23-26, 2016.



Summary & Conclusion

The new elephant in the livingroom

TV is on for a long time, but often used as a background medium on which participating FB users only paid attention to if something interesting was on. **TV used to be the center of the livingroom and it‘s still a permanent companion but it‘s not the center of attention anymore.**

Parallel screening leads to less channel switching on TV ammong participants. **Especially when commercial breaks are on, viewers studied paid much less attention to TV even if they didn’t switch channels. When smartphones were used, they got the full attention and held participant’s attention spans much longer (even compared to TV program)**

For ads the attention span on smartphones is slightly lower than on TV, however, the usual TV spot is much longer (30s) than a smartphone ad.

View rates on TV need a deeper evaluation to more thouroughly understand watching behavior on TV which is not reflected by measuring usage time only. Todays viewtime metrics for all devices are based on the time an ad is on the screen, which does not necessarily mean it is watched.

This study shows that while smartphone/newsfeed ads are watched in 80% of the time they are on the screen, for TV this is just the case for 55% of the time. Actual watching durations are similar for TV and Facebook ads. However, it‘s fair to say that the audio line of TV ads can still be received.

For advertisers rethinking metrics for viewtime on TV would help to get a more realistic picture.

For advertisers / creatives the study suggests that for TV audio is very important to create attention for the TV ad. For mobile feed ads however, creatives should be optimized for sound off.

Thank you

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