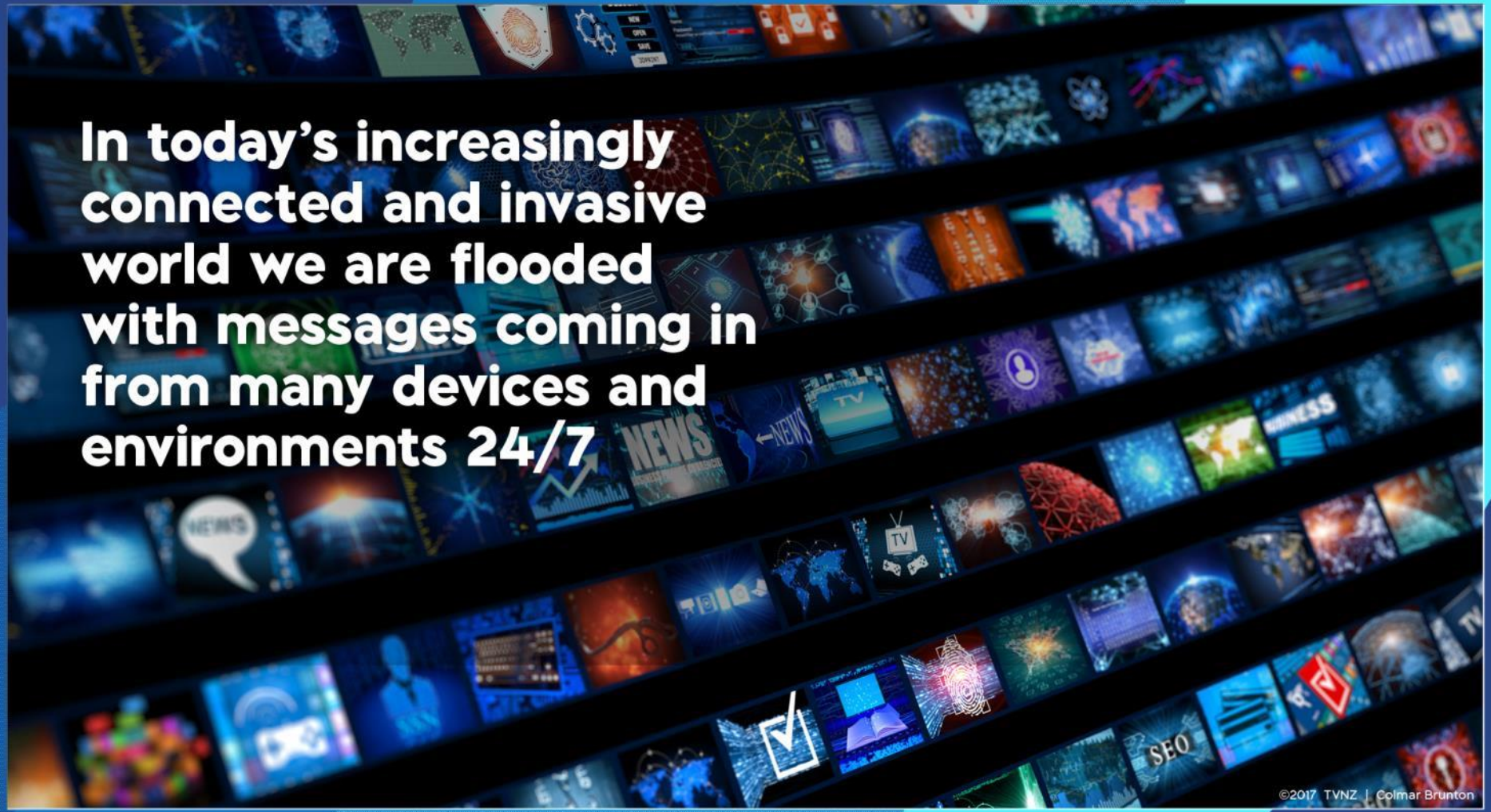
Getting “their” attention

tvnz

Forecast Series

It's always been the battle ground for marketers – how do we get people to lift up their heads and pay attention to our messages


In today's increasingly connected and invasive world we are flooded with messages coming in from many devices and environments 24/7
NEWS
TV
SEO
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We wanted to look at what's happening to attention for consumers today, and in particular look at what's happening in the homes of our NZ consumers with all those screens.

We've uncovered some critical considerations:

- Multi-screening **doesn't** mean less awareness of your TV advertising. In fact, in some circumstances, it creates better conditions for getting attention than the pre multi-screening era.
- Understanding the different role TV plays on different viewing occasions helps us better understand the influence of multi-screening.
- There have always been distractions to our TV viewing attention – we are as distracted and distractable as we've ever been – it's just the distractions that have changed.

The Methodology

1. Unique **qualitative** observational study

2. **Quantitative** measurement of multi-screening behaviour – measuring behaviour in the last 30 mins.

3. **Ad effectiveness** studies
   - Supplemented by six advertising case studies

4. **The psychology of attention**
   - A literature review of the psychology of attention and how we shift attention

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1 Qualitative Methodology

What?

An observation of natural multi-screening behaviour in the home viewing context. Actively looking for extremes in behaviour.

Why?

Explore the what, why, when and how

Observe and document behaviour

Identify triggers and distractions

Understand primary and secondary screens and related motivations

Lift out specifics (devices, platforms)

How?

In-home Go recording* of prime viewing period

(5.30-10.30pm) over 7 days in 3 lounges across Auckland

Completion of a viewing and multi-screening log from various perspectives for duration

In-home visit with household - extended depth interview

*2 cameras: seating and screen

Who?

3 households with:

- in-home Wi-Fi, access to multiple devices
- a main TV viewing room (lounge)
- a pattern of regular viewing of scheduled content

including some viewing of on-demand content, and viewing of varied content types

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1 Qualitative Methodology

Household 1

Traditional older family

One Tree Hill

- Tongan family with 5 members including three children aged 25, 19 and 17.
- They have SKY TV
- Favourite programmes include Shortland Street, sport and any crime programmes.
- Family active on social media (Facebook and Twitter) and own tablets and smartphones.

Household 2

Younger family (with grandparents)

Mount Albert

- Single parent with three children aged 11, 10 and 7.
- They don't have SKY TV but have Netflix and watch YouTube.
- Favourite programmes include Shortland Street, Home & Away and MKR.
- They own tablets and smartphones.

Household 3

Flatting

Milford

- Flatting household with three males (28, 26 and 25) and one female (26).
- They have basic MySKY TV and Netflix.
- Favourite programmes include Newshub, Shortland Street and Police Ten 7.
- They also access on demand content and YouTube through their Xbox One.

1 Qualitative Methodology

2 Quantitative Methodology:

3,807

Diary entries collected

- We recruited 595 **multi-screeners*** aged 18+ years
- Own a TV and at least one other device. Watch broadcast TV (including Sky) on their TV screen at least 3 days a week, watch TV during primetime (5.30pm – 10pm), and at least occasionally use another device while watching TV.
- **Real Time:** The surveys were sent and completed on mobile and the first question asked about their **behaviour in the last half hour**.
- Modelling using decision tree analysis

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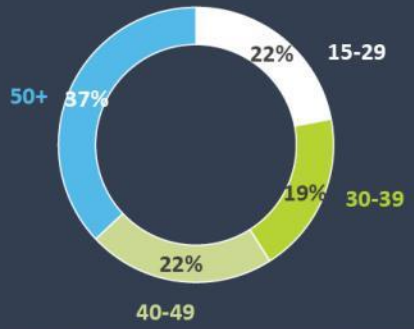
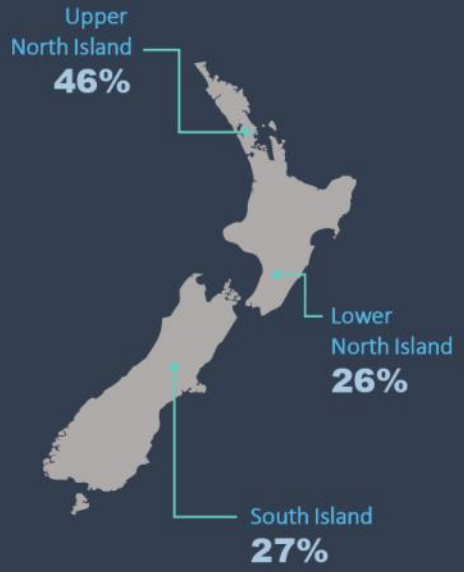
2 Quantitative Methodology: Sampling

AGE



GENDER

REGION



AGE WITH GENDER

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3 Ad effectiveness case studies

- Six independent consumer case studies
- Identifying the incremental reach in advertising awareness across each media channel
- Identifying how different channels work together to deliver superior campaign results using Kantar TNS AdEffect™
  - A post testing tool that evaluates the creative and media elements of a campaign by linking brand and ad metrics with campaign exposure.
  - 6,047 respondents

KANTAR TNS

tvnz

3 Ad effectiveness case studies

4 The psychology of attention: Methodology

A review of academic literature on attention, specifically exploring:

- Active perception
- Attention and memory
- How the brain moves attention from one thing to another and why it sometimes fails

Findings:

Observing the key roles that TV plays in the lounge

The 3 key roles TV plays in the lounge for multi-screeners

TV – THE CORE REASON

Devices are present but not necessarily in hand but everyone is more focused on TV.

'We are sitting down to watch TV'

TV – THE HUB

Our focus of attention may vary, but one will be more focussed on device, others will be more focussed on TV.

'We are spending some time together watching TV'

TV – THE COMPANION

Devices are in hand, but attention deviates from TV to device.

No one is more focussed on TV.

'TV is on (keeping us company) whilst we do other things on our devices'.

Findings:

Key learnings from these observations:


The content we consume on devices whilst we are multi-screening is very seldom “unmissable”...
Facebook mobile
19:04
facebook
Home
Profile
Friends
Messages (1)
News Feed
Events
Places

The content we consume on devices whilst we are multi-screening is very seldom “unmissable”...

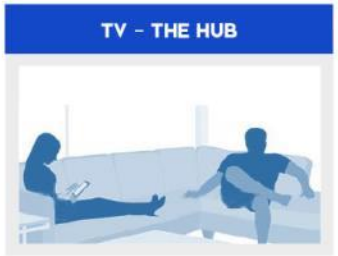
- What we do on device is unstructured and rarely related to TV content.
- When we are multi-screening, most of the time we are social networking or viewing unrelated content on our device.
- We may use our device to seek out information that is related to the content that we are watching (i.e. finding out more about actors in movies, proving/disproving things we have just heard on TV, sometimes after we see an ad for something we like), but there are few examples of true content meshing.

Contrary to popular opinion...

- The device keeps viewers away from the remote when the ads come on, presenting the opportunity for attention to shift to the TV
- Multi-screeners are **less** likely to leave the room creating the opportunity for attention to be retained or shift to the TV

Quantitative findings:

Now you're in the lounge, what are the distractions? And, what's happening to my attention?



Quantitative findings:

Now you're in the lounge, what are the distractions? And, what's happening to my attention?

TV attention

TV is receiving their full attention. It's their reason for being in the room – e.g. to focus on a favourite show

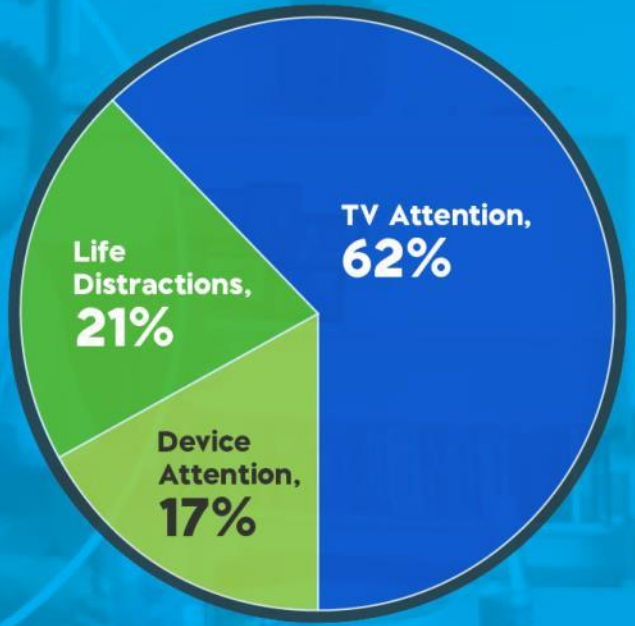
Life distraction

E.g. Putting the kids to bed, making a cup of tea, paying some bills.

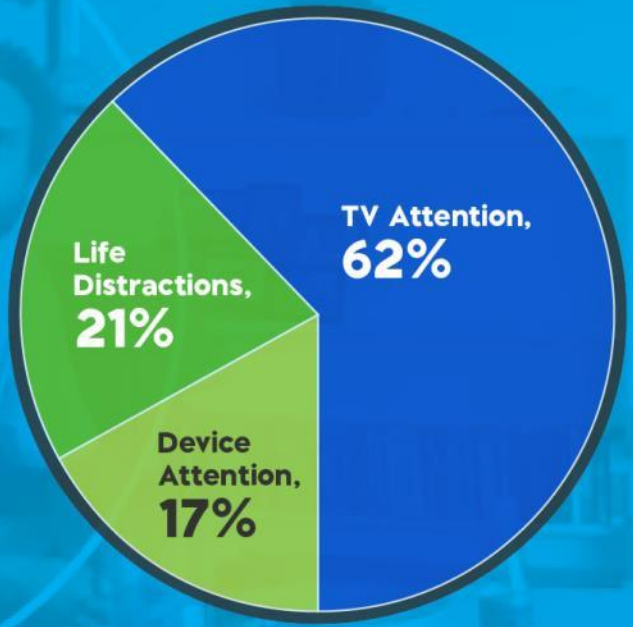
Device attention

E.g. Messaging, social media, emails, checking news

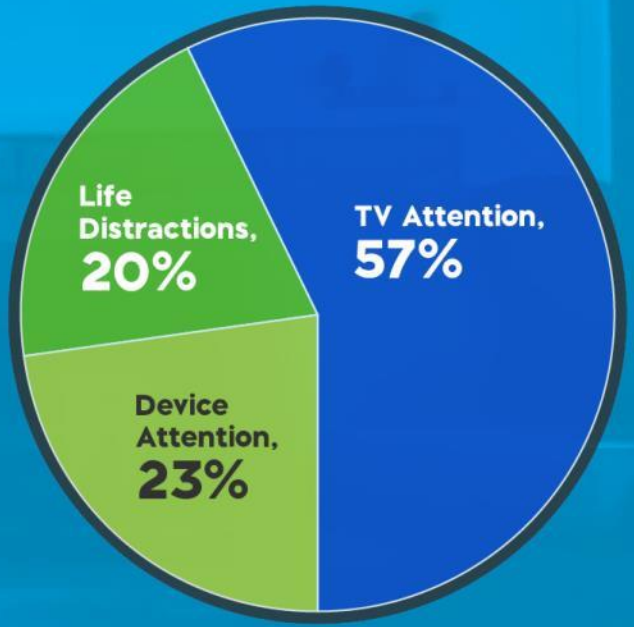
In an average half hour of TV viewing, the majority of attention is on the TV



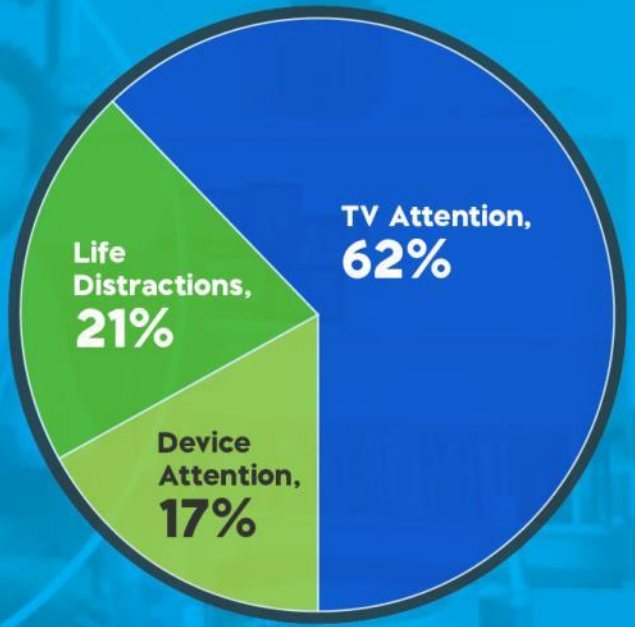
This is even true when we look at the under 30's



All respondents

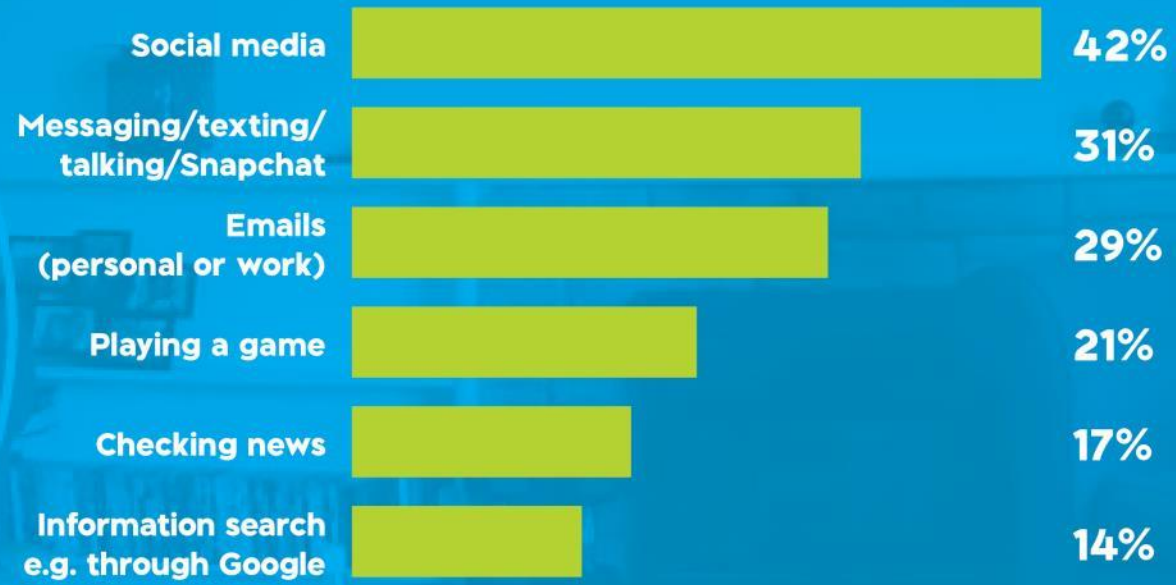


Under 30's

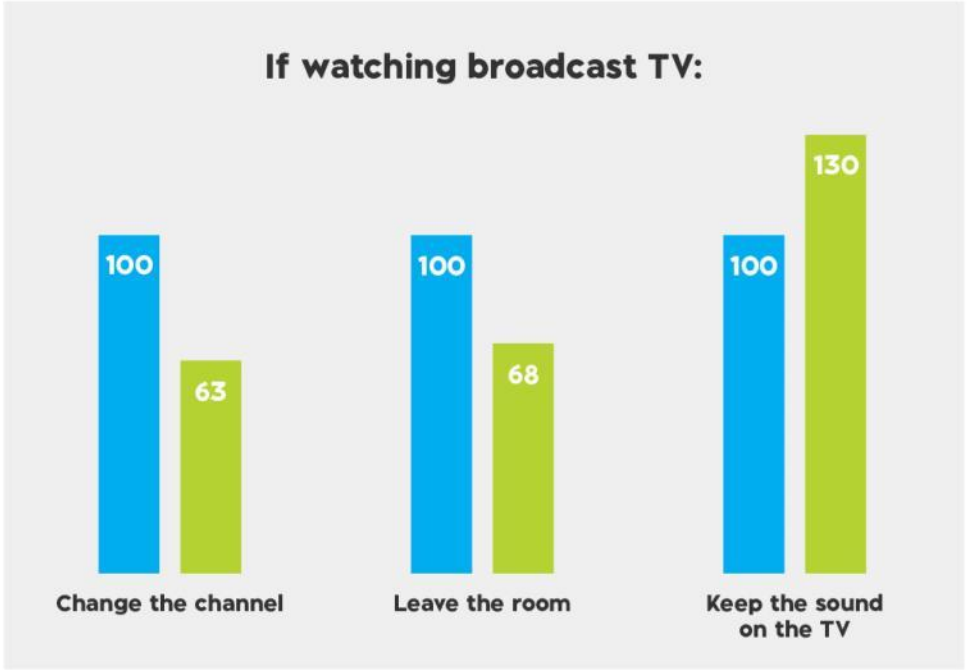


The highest TV attention is driven by pre-recorded TV and watching drama with Sunday night the highest attention spot

What are people doing on their devices?



Multi-screeners are less likely to miss the ads – their hands are busy with their device so they're less likely to change the channel, leave the room, or fast forward... and more likely to keep the sound on the TV, leaving them 'available' for advertising messages.



Our favourite distraction may be looking down at our device – but with the right content we will also look up at the TV

For **one-in-five** multi-screeners – it was something they heard that made them look up from their device.

Top reasons for returning concentration to TV

The ad break was over/programme re-started

32%

Nothing in particular/I'd finished what I was doing on my device

25%

I heard something that made me look up

21%

I realised I hadn't been following what was on

15%

We have two main senses when we are ‘watching’ TV

While TV advertising typically focuses on engaging consumers with the visual elements of video, don’t forget the role of sound to capture/re-capture attention particularly in out multiscreen world.

Audio plays a critical role to (re-)capture attention through:

Music	Verbal story-telling	Being different or unexpected	Cueing long-term memories
			

So, now we know the three roles of TV in the lounge and what reduces their attention in those circumstances.

Taking a closer look, we found four distinct scenarios:

TV – THE CORE REASON	TV – THE HUB		TV – THE COMPANION
Scenario 1	Scenario 2	Scenario 3	Scenario 4
Fully Engaged with TV **24%** of viewing occasions	Life Distractions (no device) **18%** of viewing occasions	Life and Device Distraction **27%** of viewing occasions	Device Attention **31%** of viewing occasions


So, let's take a closer look at the profiles of the 4 scenarios...

The 4 attention scenarios

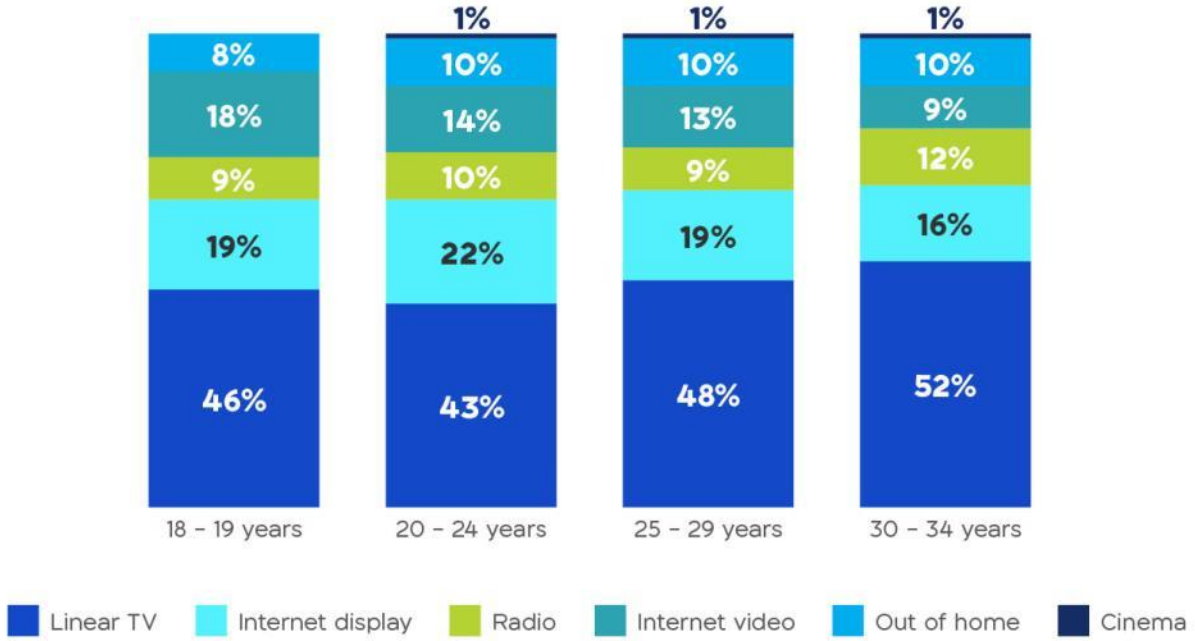
What's really interesting is that even in scenario 4 with high device distractions, TV ads are recalled at 80% of the recall we get in scenario 1

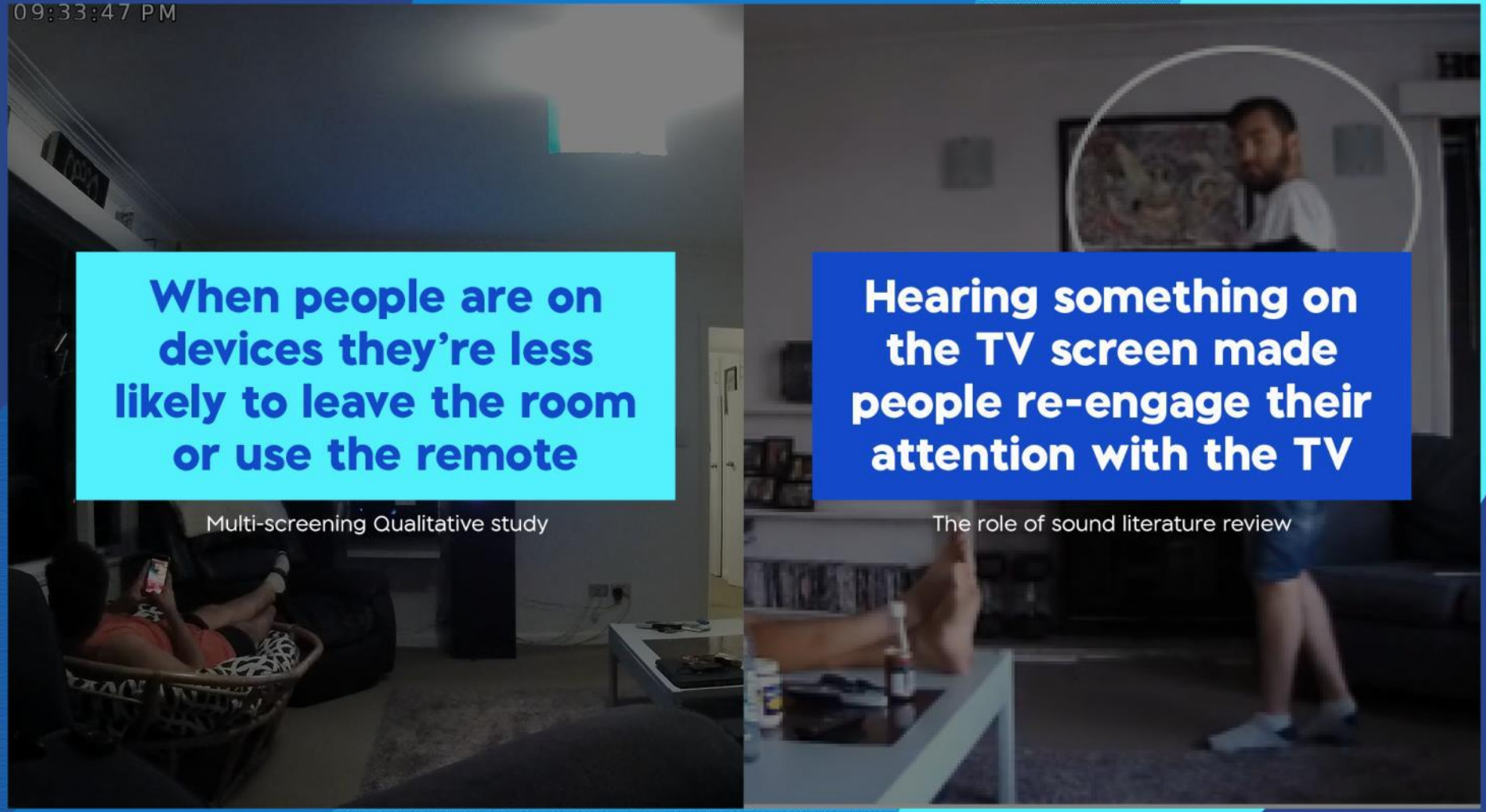
	TV: The Core Reason	TV: The Hub		TV: The Companion
	Scenario 1	Scenario 2	Scenario 3	Scenario 4
	100% of their attention is fully engaged with TV	Life distractions (no device)	Life distractions and device attention	Device attention
% of viewing Occasions	24%	18%	27%	31%
Attention Spread	TV 100%	TV 69% / 31% (Life distractions)	TV 42% / 47% / 11% (Life distractions / Device attention)	TV 47% / 7% / 46% (Life distractions / Device attention)
Recalled Adverts	33%	30%	24%	26%

Whilst, perhaps initially surprising, this is supported by our previous findings...

Our Ad Effectiveness case studies found that for millennials TV still contributes the bulk of advertising recognition.

Share of advertising recall by age band (5 case study average)




09:33:47 PM
When people are on devices they're less likely to leave the room or use the remote
Multi-screening Qualitative study
Hearing something on the TV screen made people re-engage their attention with the TV
The role of sound literature review

And let's not forget the majority of us are still watching 'live' TV

of any content viewing occasions on their TV (including SVoD) were watching TV live

- 51% watching FTA TV as it was broadcast

50+yr olds (63%) **Under 30yr olds (58%)**

21%
were watching pre-recorded broadcast TV
(16% watching pre-recorded FTA TV)

40-49yr olds (32%)

8%
were watching any free OnDemand TV
(4% Broadcaster OnDemand, 4% YouTube)

Under 30yr olds (13%)

8%
watching Subscriber VoD

Under 30yr olds (13%)

Conclusion:

Don’t fear the device

Next time you’re considering the impact of multi-screening on your planned campaign, here’s the

Top 10 reasons to embrace rather than fear the device

The Top 10

NUMBER 10:

59% of all TV/video occasions are being watched as they're broadcast.

NUMBER 9:

3/4 of multi-screeners are watching TV/ video content in an average prime-time half hour

(even 70% of Under 30's are)

NUMBER 8:

Just because younger audiences have a digital device in front of the TV does not mean you won't get their attention to the TV.

The Top 10

NUMBER 7:

The way we watch TV and respond to TV advertising hasn't really changed at all, we are as distracted and distractible as we have ever been.

It's just the distractions that have changed.

NUMBER 6:

It has moved on from the days when we would get up, leave the room and put the kettle on during the ad break to us picking up our device and staying in the room when the ads come on.

NUMBER 5:

Second screens are a better form of distraction that help to retain the opportunity for advertisers to engage with TV viewers.

Picking up a device means the audience is less likely to channel hop or time shift TV advertising.

The Top 10

NUMBER 4:

Auditory cues are really important

21% of people heard something that made them look up

NUMBER 3:

We are not passive recipients of the information we encounter. Even when our attention is divided we form conscious memories.

NUMBER 2:

Just 1/10 multi-screening occasions are related to TV content (meshing).

This is an opportunity to create engaging, consistent advertising that travels across screens

The Top 10

NUMBER 1:

A big

opportunity exists for you to exploit the multi-screen moments...

Appendix

A few words on attention and memory...

A few words on attention and memory

- Humans are not passive recipients of the information they encounter but rather are active participants in our own perceptual process. They have to switch on – it's not sufficient to have it in front of you – even if you are staring at it

- In order for information to be encoded into memory, we must first pay attention to it. The process of paying attention to a particular piece of information is called attentional capture.

A few words on attention and memory

- Memory has a limited capacity and so attention determines what will be encoded.

  Division of attention during encoding prevents the formation of conscious memories.

  Such memories can be encoded even when there is another concurrent task, however the stimuli that are to be encoded must be selected from among other competing stimuli.

- Memory from past experiences guides what should be attended to.

A few things to know regarding how the brain moves attention from one thing to another, and why sometimes it fails.

Three phenomena - three attention related phenomena are discussed: attentional blink, inattentional blindness and change blindness. Each of these explain why in certain situations, individuals may miss important information in their surrounding environment.


Attentional blink
When you shift attention from one thing to another there's a gap, essentially it's like an eye blink where nothing's going into the brain.


Inattentional blindness
Not seeing what's right in front of us.


Change blindness
Not picking up on obvious changes in what we are seeing now (when its right in front of you) compared to what you first observed.

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