
22/01/2014

How multi-screening and on-demand changes, and what this means for brands

Neil Mortensen, Thinkbox

Zeeland

Agenda for today

01 Who are Thinkbox

02 Multiscreening insights and innovations

03 On demand consumers and commercial development

04 Implications and questions

Thinkbox is supported by 92% of UK broadcasting

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Main shareholders



Associates, supporters and some partners



What do we mean by TV?

Spots

TVoD
Television
on Demand

Sponsorship

AFP
Advertiser
Funded
Programming

PP
Product
Placement

Promotions
&
Competitions



What do we do?

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Information
Inspiration
Innovation



...more time is now spent explaining TV's future

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It's available
on the move

It's available
on-demand



A brief taste of these 2 pieces of Screen Life research

The view from the sofa



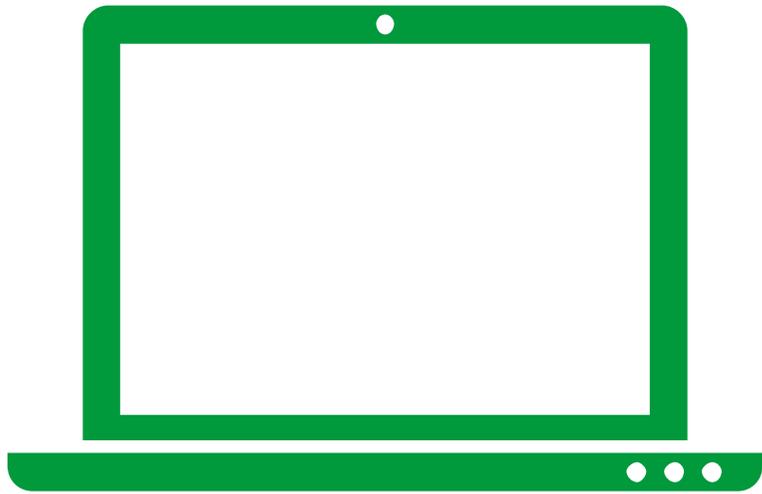
Exploring multi-screening

TV in demand

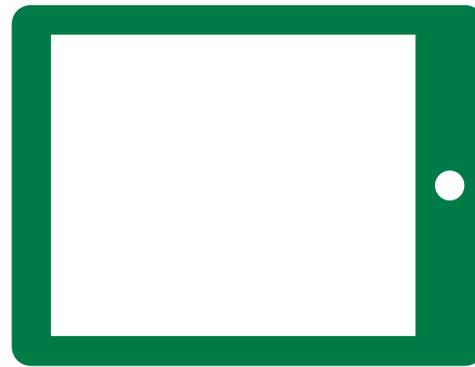


Exploring VOD

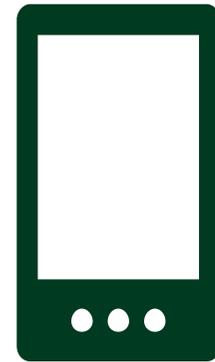
Opportunities to view are on the increase



81%



26%



59%

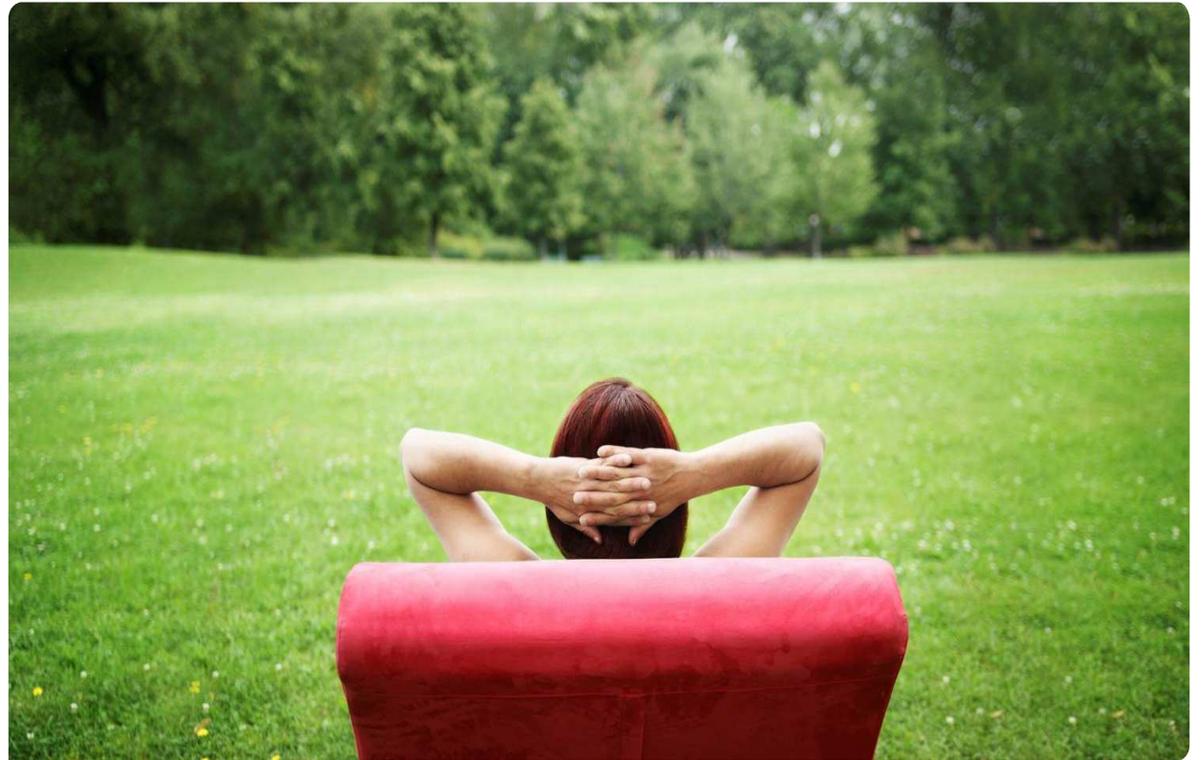
Source: Ipsos Tech Tracker Q4 2013. Adults 15+ penetration figures

The need to explore this new landscape

New opportunities driven by behaviour
– not by us – & it's growing

Confirms some beliefs & delivers new
exciting insights

Implications for TV advertising



Robust multi-dimensional study

In partnership with COG research this study was conducted in six phases



1,000 UK Online Adults quant surveys

1,200 hours of footage



2,800 'digi ethno' interactions

40 hours of depth interviews



74 Adults through innovative lab study

1,000 UK Online Adults quant surveys



A chance to capture real life behaviour

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Screen Life

Capturing real life
behaviour



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Multi-screening brings a dynamic new relationship with TV

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Bringing viewers closer to their programmes

Gives programmes extra depth

Viewer empowerment

Interaction with both ads & programmes



Multi-screening brings a dynamic new relationship

thinkbox

Screen Life

Multi-screening brings a
dynamic new relationship



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TV drives interaction

Researching content/buying

Sharing/playing with online friends

Participating with content and ads

Multi-screening drives word of mouth
online



TV drives interaction

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Screen Life

TV drives interaction



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Multi-screening triggers more live viewing

Connected people

Virtual shared moments

Optimise interaction & minimise spoilers

Principle of 'loss avoidance'



Multi-screening keeps us in the room

A benefit we never predicted

Perceived as 'time well spent' -
reduces compromise

Growing sense of togetherness



Multi-screening keeps us in the room

thinkbox

Screen Life

Multi-screening keeps
us in the room



thinkbox

There is huge potential for advertisers to get on board

Respondents like/use apps – used to instant response

Apps for programmes, less so for ads

Rewards for instant action

Logical extension



Does attention even matter?

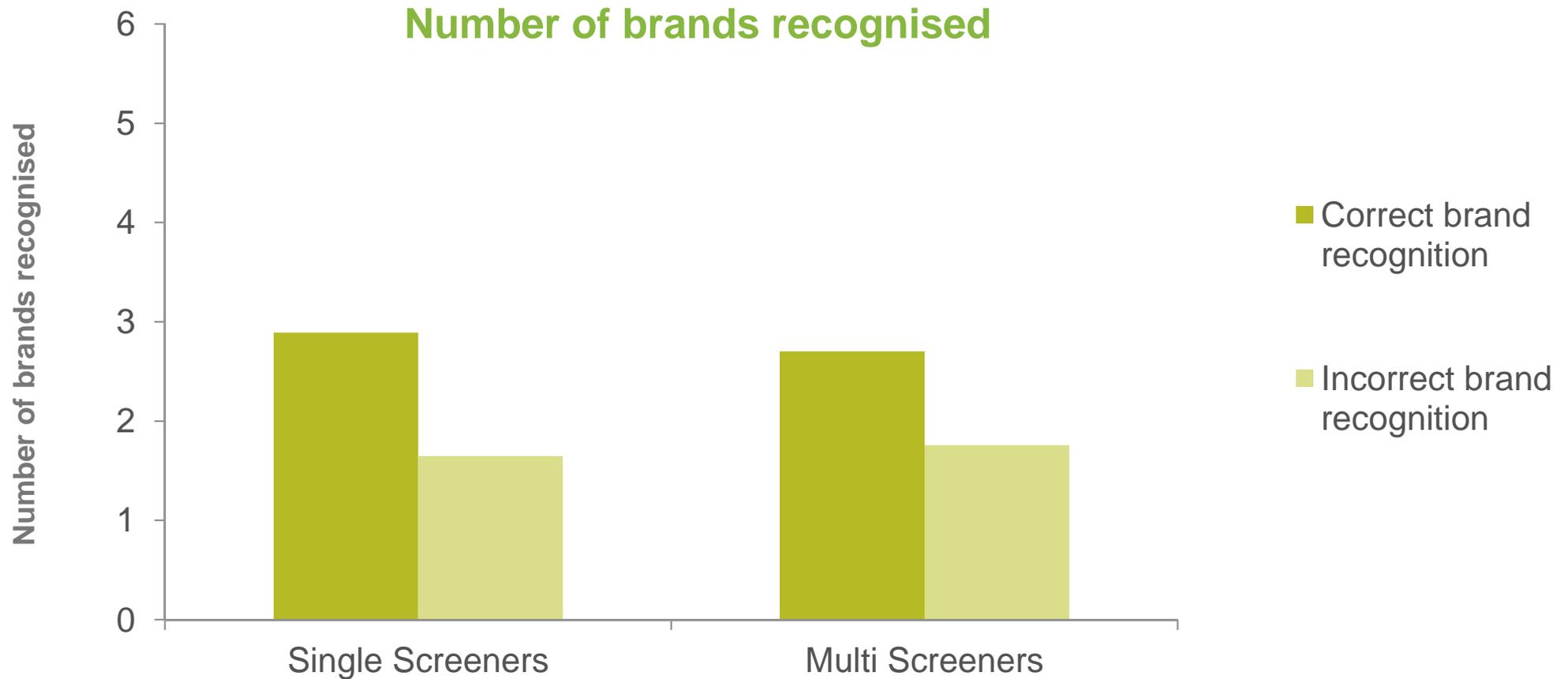
Is there a cocktail party effect when multi-screening?

We keep our mind's eye (& ear) open – always on the look out for relevant things

We went into the lab to find out



Multi screening did not influence ad recognition



N= 37 for both single and multi-screeners. Difference non-significant ($p>0.1$)

People take ads in even when they don't look like they are

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Screen Life

Food for thought



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Second screen innovation



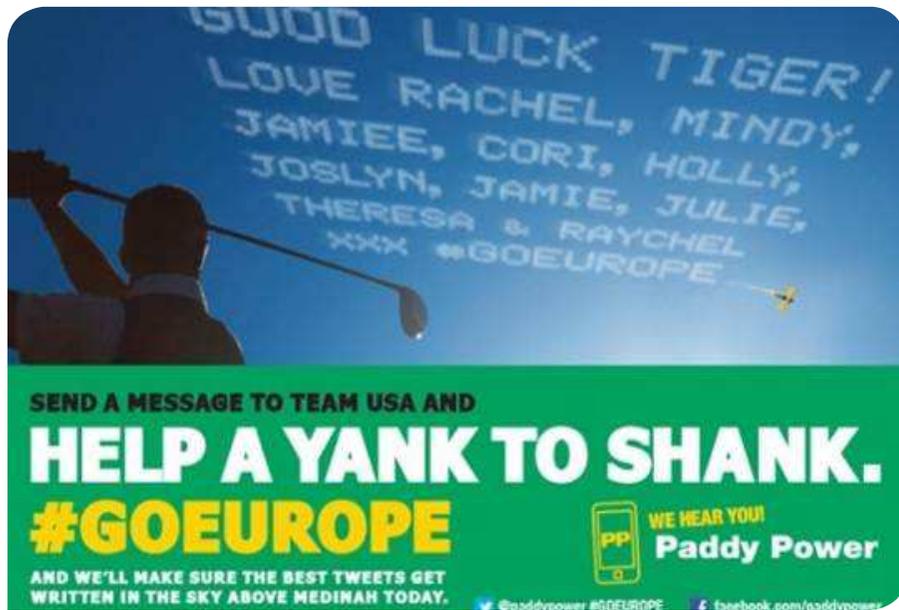
Chat

Play

Discover

Buy

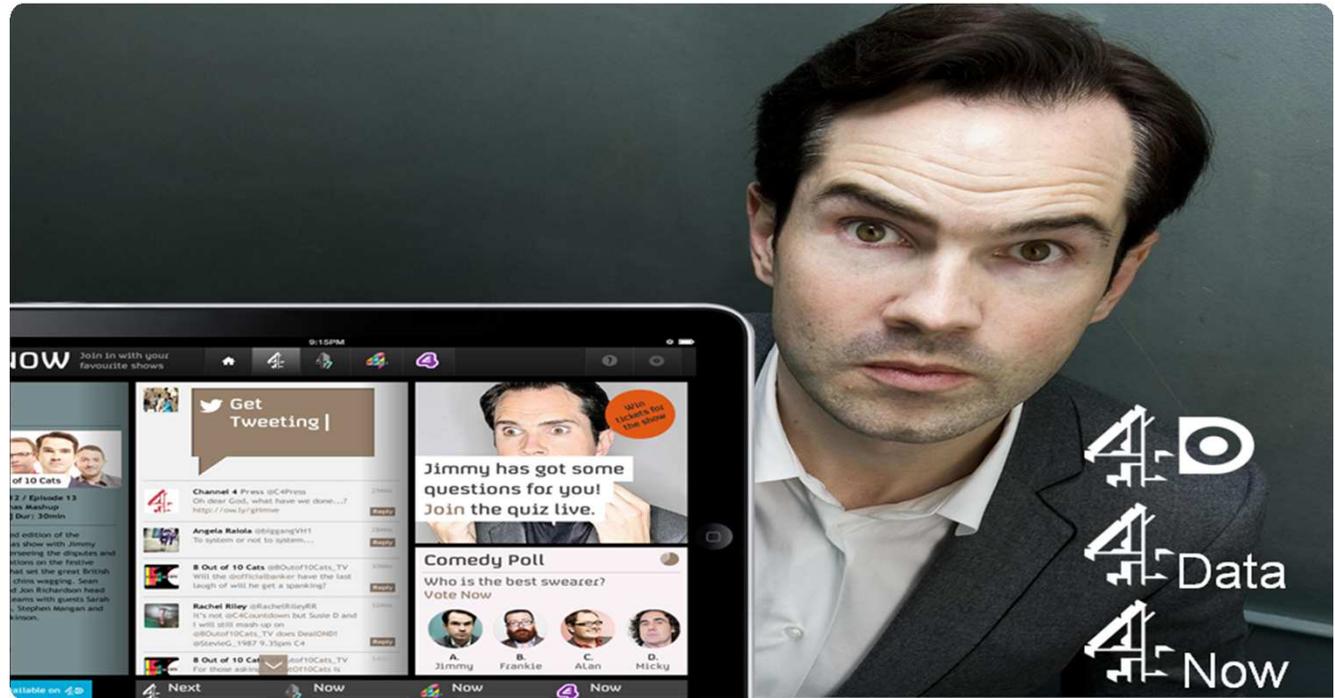
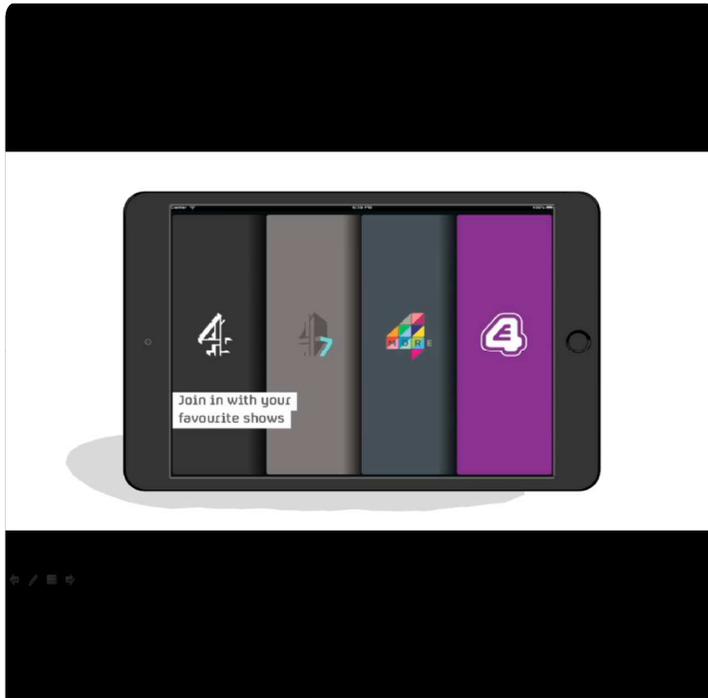
Enabling tweeters to become Europe's 13th man



The Voice and Vodafone (Holland)



4Now represents the next step



Discover - ITV's ad sync format



Multi screen synchronous ad format

Debut during X-Factor

When TV ad airs, on second screen rich media takeover appears

22/01/2014

Screen Life : TV in demand

Neil Mortensen, Thinkbox
@neilmortensen

Broadcaster VOD has now moved to all screens

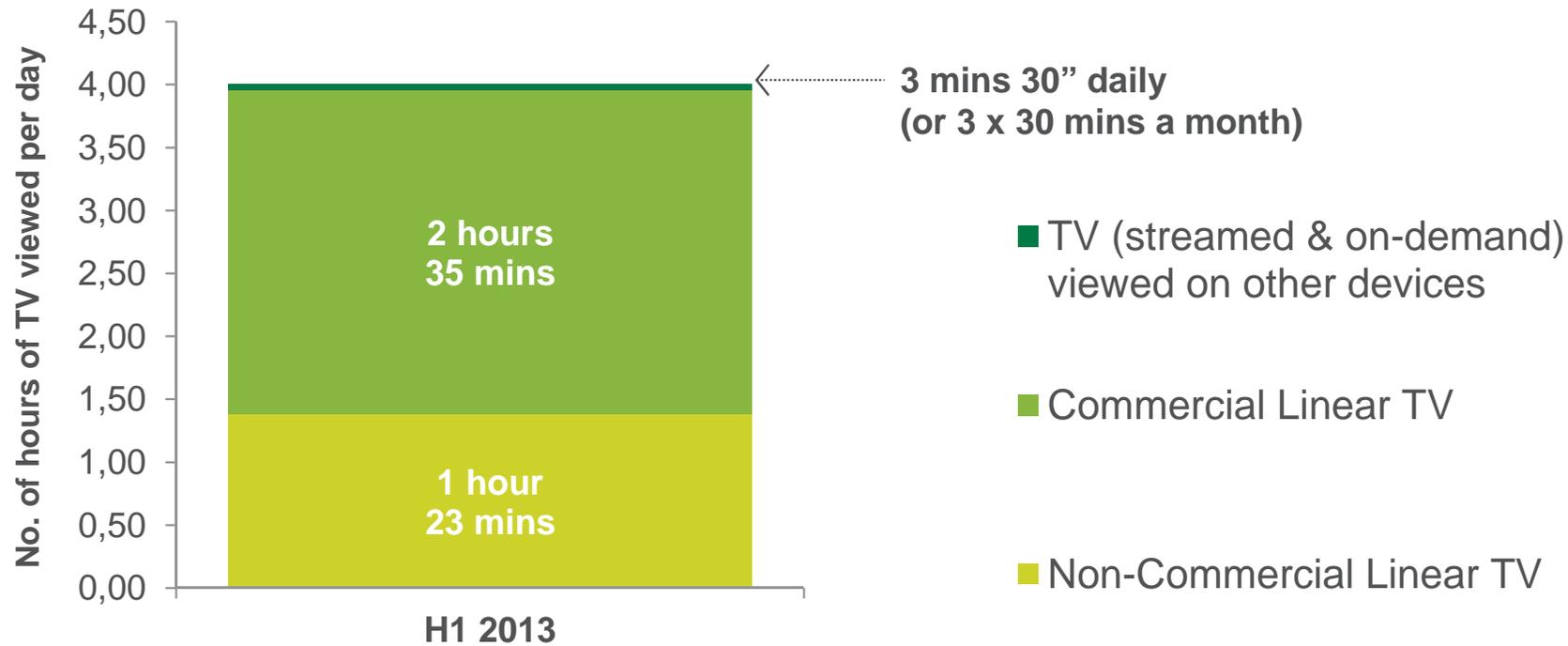
Broadcaster VOD



All Screens

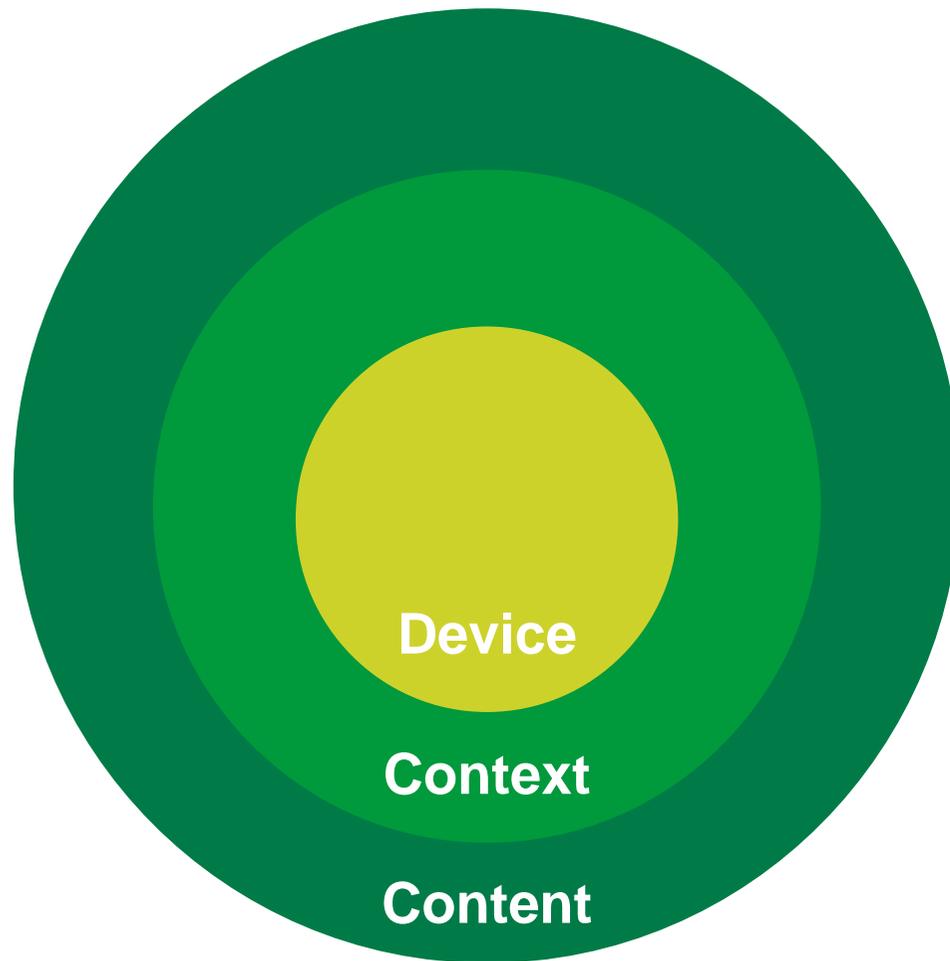


And this is growing TV viewing



Source: BARB Jan-Jun 2013 and UK broadcaster data, individuals

A media planning minefield



What are differences and similarities between watching live TV, time-shifted TV and all types of VOD?

The implications for advertisers

Not easy to research....

Robust process with depth and scale

The Observation

- **18 x 'on-demand' households**
2 week deprivation task
- **10 x households**
2hr media immersions



The Experts

- Semioticians
- Sociologist
- Behavioural Economist
- Cultural intelligence



The Validation

- **660** sample real time viewing diary
- **Additional survey** to capture broad attitudes



The Tools

- Planning Tool
- BARB fusion
- TouchPoints 5



If VOD offers the ultimate experience of

exactly what you want, whenever you want it,

wherever you are...

...why are we not watching VOD all the time?

And people's real reactions weren't what they predicted

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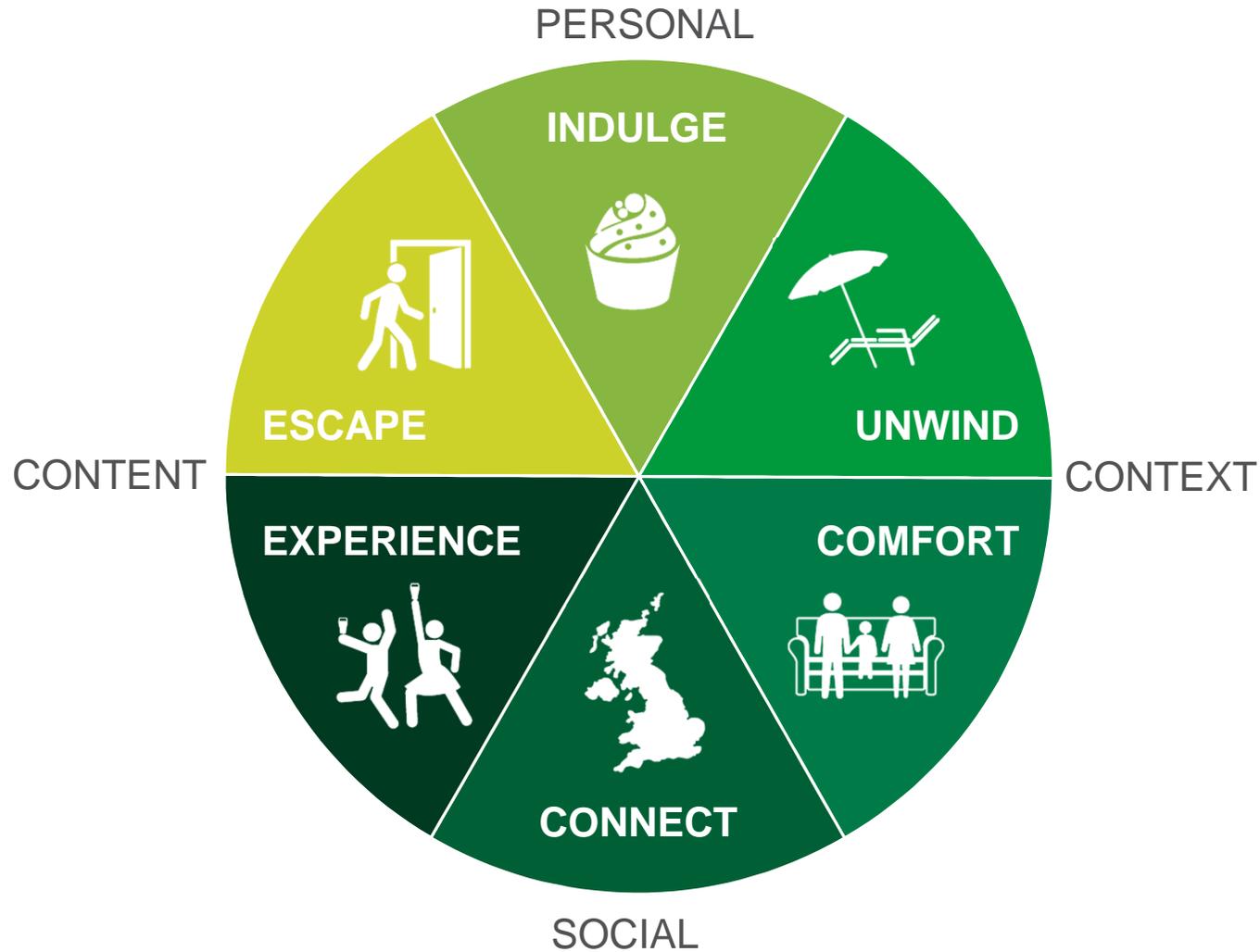
Deprivation of live TV



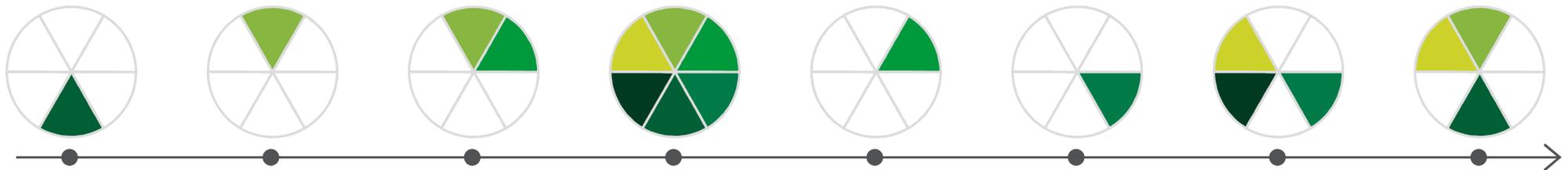
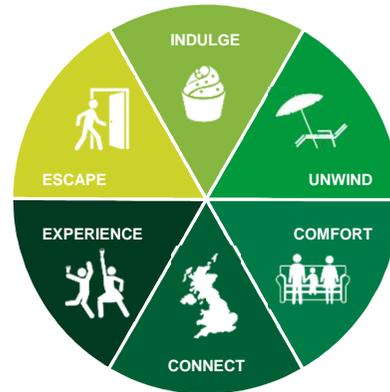
If live TV is our daily food,

on-demand is a box of chocolates

Research reveals 6 needstates in video



Weekday needstate timeline



BREAKFAST



COMMUTE



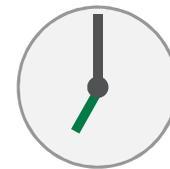
AFTER
SCHOOL
RUN



DAYTIME



ARRIVING
HOME



FAMILY
TIME



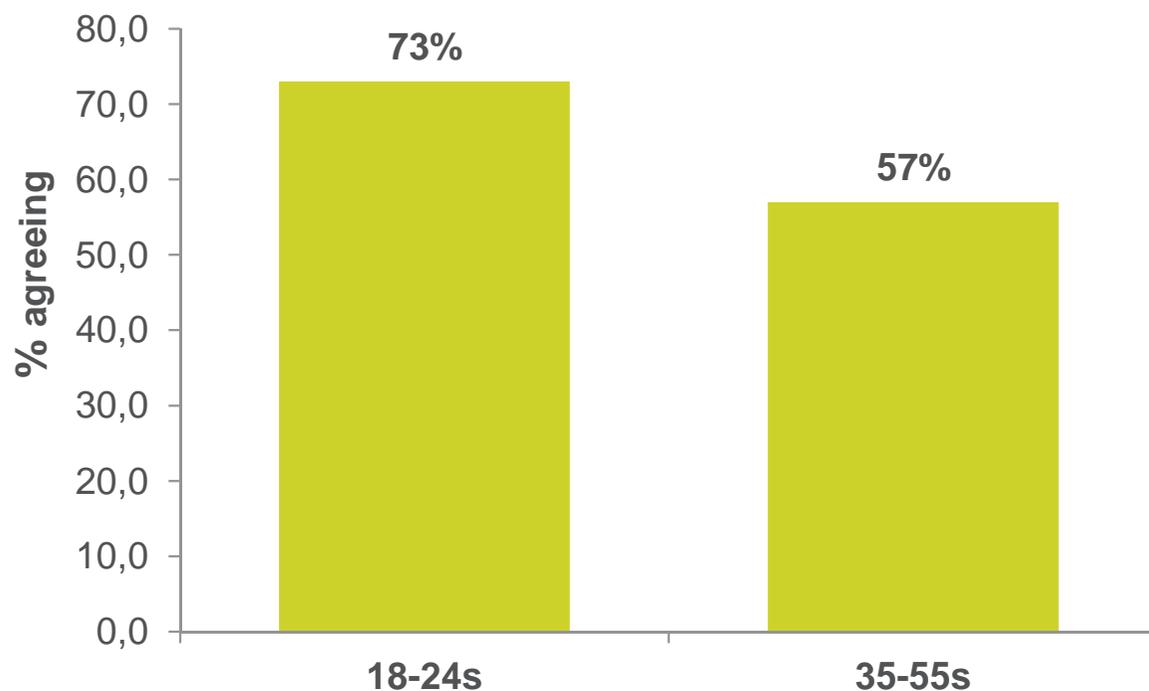
ADULT
'QUALITY
TIME'



BEFORE
BED

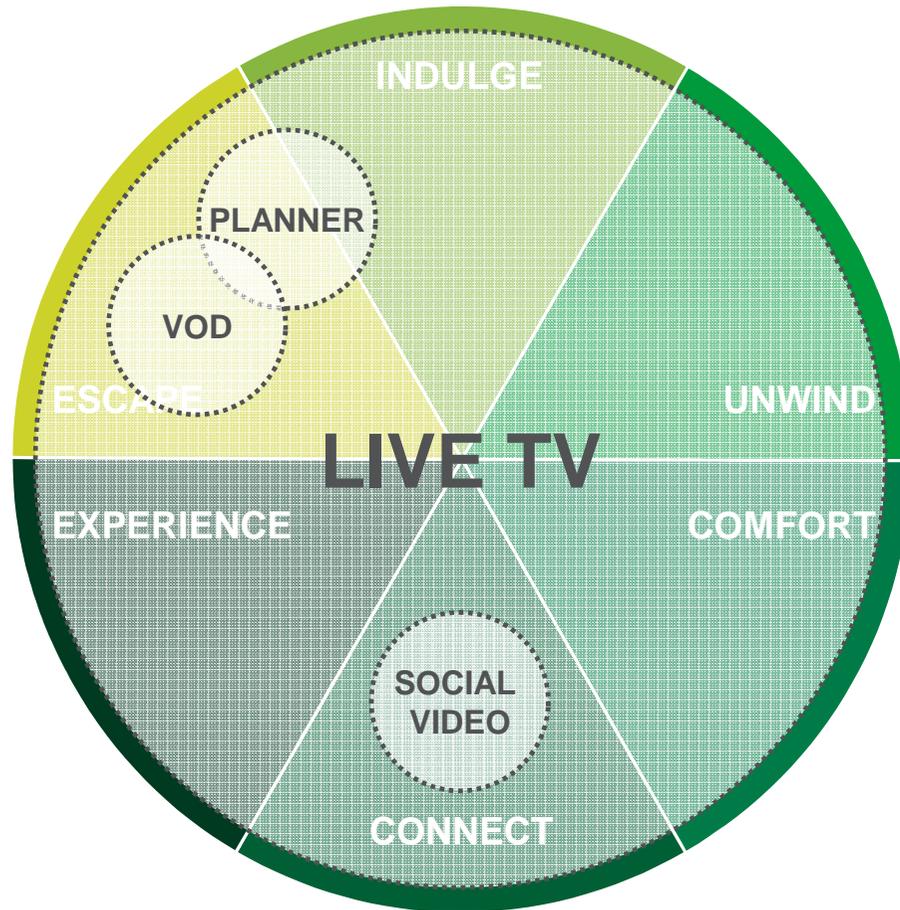
Not all age-groups are the same

Would rather watch a show they like week by week then download all the episodes in one go



18-24s spend almost twice as much time in the connected need state as 35-55s (28% v 15%)

Different platforms meet different needs

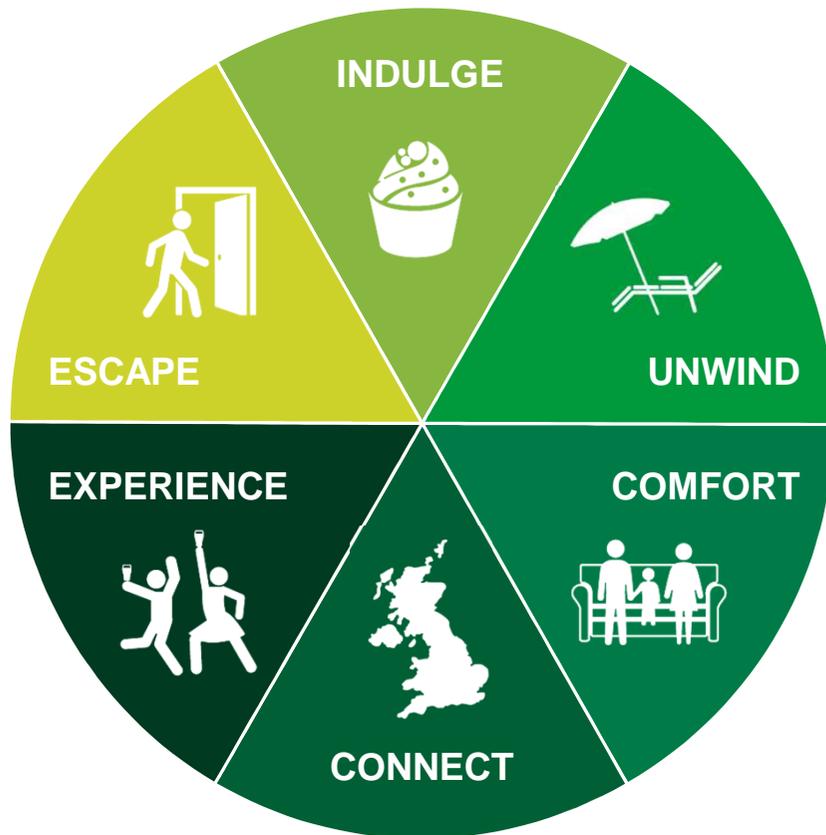


LIVE TV SATISFIES ALL NEEDSTATES

VOD & PLANNER GOLDPLATE ESCAPE

SOCIAL VIDEO ENHANCES CONNECT

Advertising works differently according to needstates



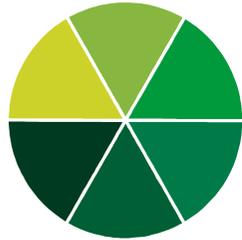
Acceptance

Ads are more readily welcomed in some needstates more than others.

Congruence

Certain product categories, narrative structures and tones are better suited to some needstates more than others.

So looking forward



NEEDSTATE

Understanding Content, Context and Device to make advertising work harder



INTERACTION & RESPONSE

Deeper brand immersion experiences.
Stepping stone to advertiser websites



MOBILITY

TV sets, PCs, tablets and smartphones.
Broadcast content in new contexts



ADDRESSABILITY

Additional ability to deliver personalised advertising

VOD – ITV's Ad Explore

The screenshot shows an interactive advertisement for ASOS Savvy Sunday. The ad is displayed within a video player interface. At the top left, it says "INTERACTIVE ADVERT" and "24 HR SAVVY SUNDAY". The main text reads "UP TO 60% OFF CASUAL WEAR FOR 24 HOURS ONLY. SHOP NOW*". Below this is the ASOS logo and the tagline "discover fashion online". A small disclaimer at the bottom of the ad says "*Ends 12pm Monday. Selected items only, whilst stocks last." The ad features two product images: a white t-shirt with "CONFESSION NO" printed on it, and a purple sneaker. Below each image are price tags: "RRP £60 NOW £28" for the t-shirt and "RRP £42 NOW £26" for the sneaker. A large banner at the bottom of the ad reads "ASOS SAVVY SUNDAY". The video player interface includes a play button, a progress bar, and a volume icon. The text "This Morning" is visible in the bottom left corner of the player, and "Advert: 1 of 2 (00:29)" is in the bottom right. A vertical button on the right side of the ad says "Hide this window".

asos
discover fashion online

itv PLAYER

Source: ITV

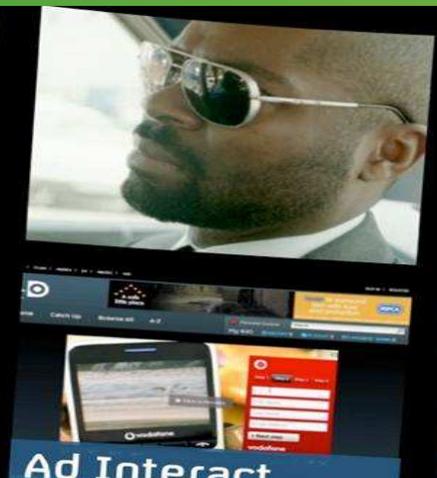
Channel 4 VOD formats



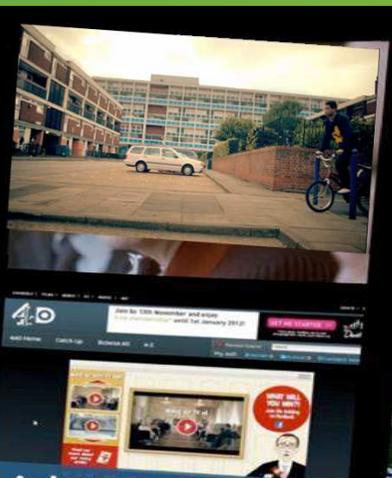
Ad Elect



Ad Social



Ad Interact



Ad Bloom



Ad Mix



Ad Pause



Ad Extend



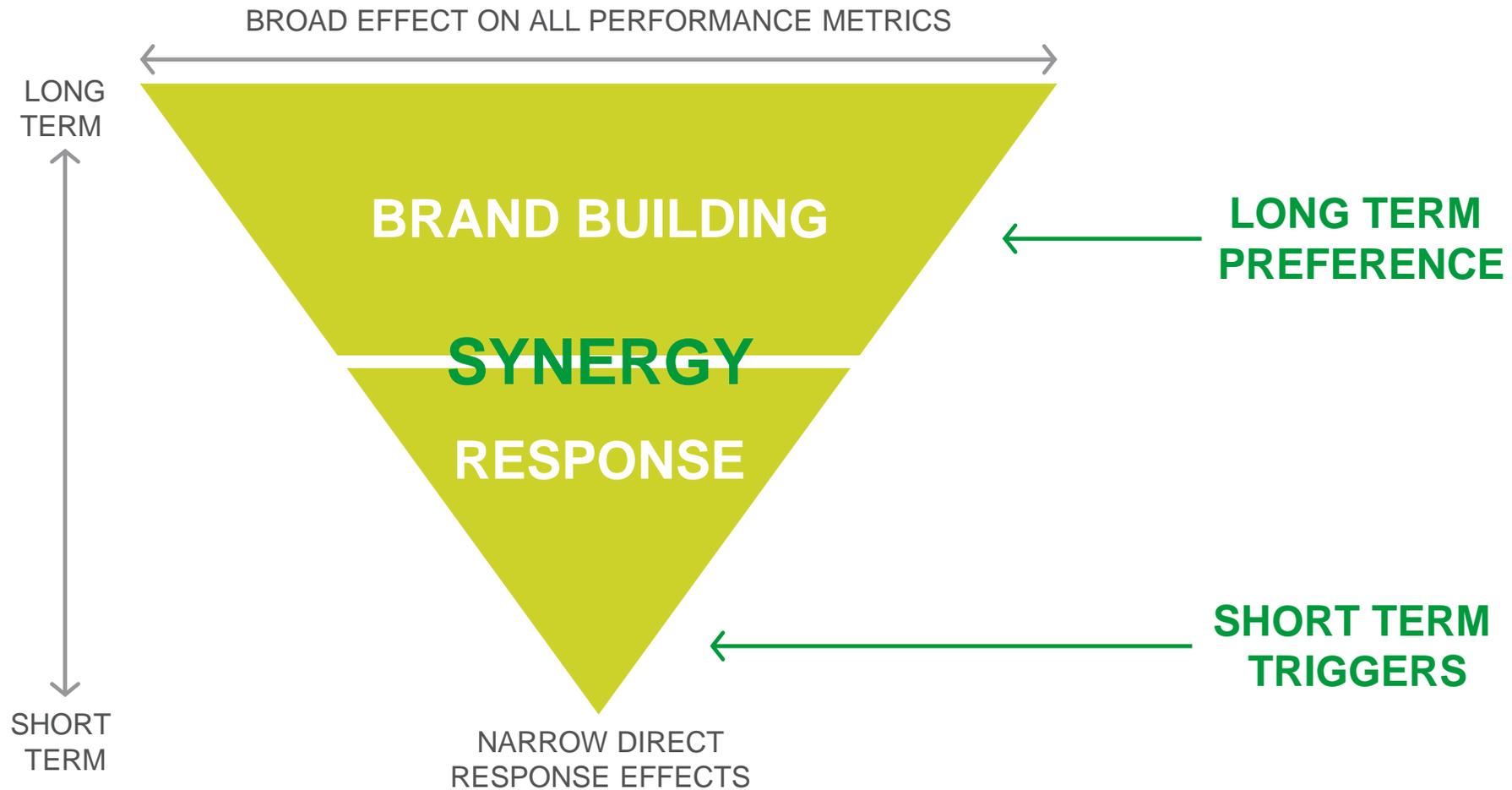
Ad Link



Implications



The next step is “buy”...TV’s role in the purchase funnel



Some final considerations

Give it time
and
investment

Keep reach
at the heart
of the
campaign

Respect
the
viewers

Think hard
about
measurement





Embracing new ways of watching TV

Bringing TV closer to purchase

Increasing value for viewers and performance for advertisers

Thanks for listening

www.thinkbox.tv
@thinkboxtv
@neilmortensen

