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The 2013 European Television Symposium

Screen Life : TV in demand



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Screen Life : TV in demand

asi 2013 European Television Symposium
November 2013

Neil Mortensen, Thinkbox
@neilmortensen

Good morning and thank you for inviting me here this morning,

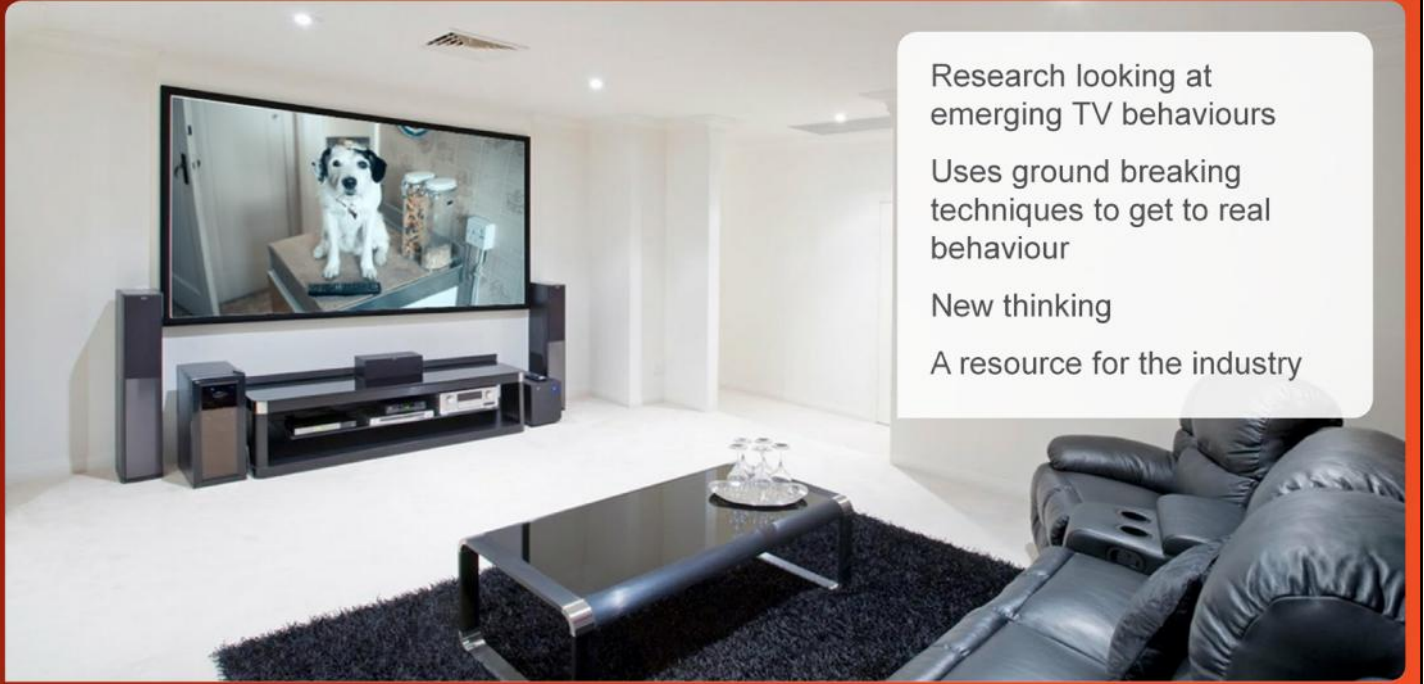
I'm frankly over excited to be talking to you all about our latest new piece of research:
Screen Life: TV in demand.

I can't quite believe that this is actually the first time I've been to the asi conference, and
I'm delighted to be here sharing this work with such an esteemed audience.

So esteemed, I'm actually a little bit nervous

What is Screen Life?

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Research looking at emerging TV behaviours

Uses ground breaking techniques to get to real behaviour

New thinking

A resource for the industry

Screen Life is our on-going series of research studies looking at emerging TV technologies and behaviours.

This new stuff is often difficult to research, especially if you want to get to real behaviour

But it often rewards us with brand new significant insights and a useful resource for ideas, insight, and planning

What we're talking about today

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Why this, why now?

How we are going about the research

The results so far

What next?

Our first 'Screen Life' study – 'the view from the sofa' - explored the new world of multi-screening and now we are back, looking at the expanding world of Video on demand.

With video becoming so ubiquitous, it is important for us understand exactly what is going on

So, in the next 20 minutes I'm going to run through the why, the how and the what next.

It's going to be a whistle-stop tour on what is it seems a never ending research project...in a good way....

In the beginning...

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Cast your minds back to 2006. If you wanted to watch The IT Crowd on-demand with a mate you'd have to gather round a desktop and peer at the screen, moving the mouse now and then to stop the screen locking.

It all felt a bit hard to do. Not very flexible, hard to share, a bit of a lonely experience

...was VOD

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...and VOD was just these:



Nov
2006



June
2007



Dec
2007

the other broadcaster VOD services were quite slow to follow and the experience wasn't always as good as the promise

BUT

It started to deliver that easy catch-up, and the convenience, control and choice we have come to expect

2009 – 2013: a flowering of VOD

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New services



New screens & boxes



Since then there has been an explosion.....a flowering.

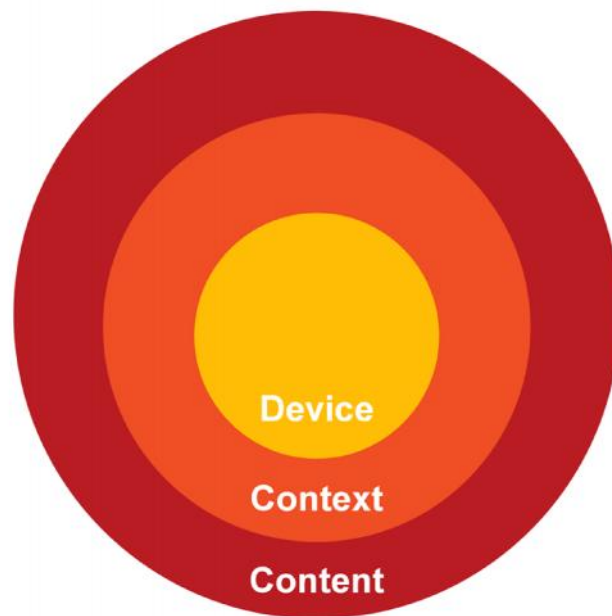
The VOD landscape is unrecognisable with new services from the existing TV players but also new entrants wanting to get into the TV game.

When you add these services to the growing array of different screens that VOD is now available on – including people's main TV sets – then you are looking at a very rich but complex scenario.

But is it all TV? How can we unpick the expanding spectrum of TV, VOD and online video.

What does all this mean for advertising communication?

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And what are the implications for advertising?

We know that advertising is affected by the content that is being consumed (the type of media and genre),

the context in which you are consuming it (where and with whom),

and the device you are watching on.

So in practice what this means is that watching Broadchurch on live TV in the living room along with 10 million other people, is different from watching it on your planner 2 days later, which is different again from watching it on your tablet on the train on ITV Player – and the advertising may work differently too.

But with so many combinations of content, context and device, how can the media buyer and advertiser work with such complexity?

In-depth understanding of VOD:

- The differences and similarities between watching live TV, time-shifted TV and all types of VOD
- The implications for advertisers

So how do you go about researching that?

It is complex but the objective was pretty simple.

What is the difference between watching linear TV and broadcaster VOD? And what are the similarities? And how do other on demand services fit in?

And what is the effect on advertising, the acceptability of it and the ideal format for it.

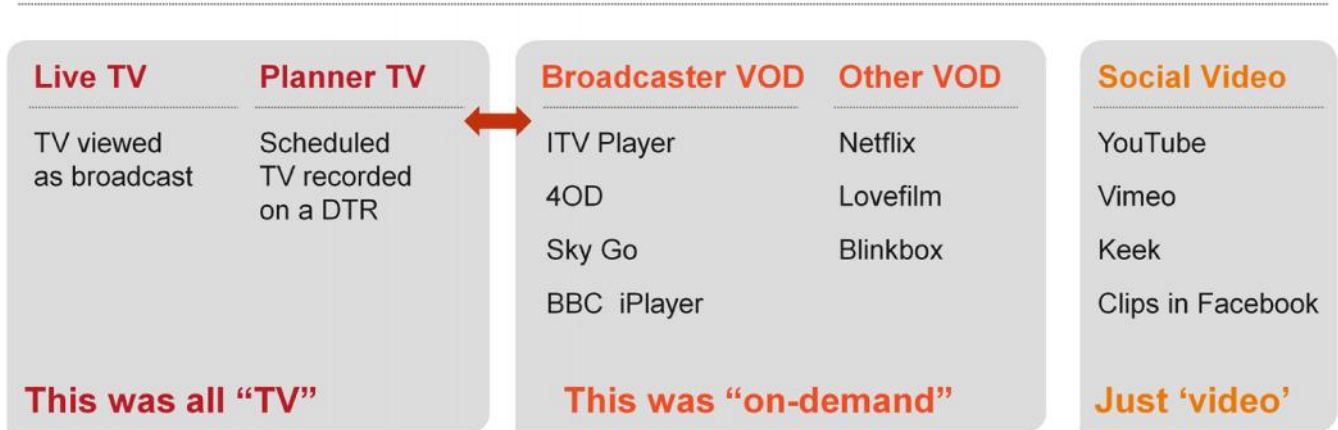
But researching it is not simple...We can't just ask people.

People are rubbish at revealing their own behaviour.

So we needed to go deeper, beyond the rational, and into the real reasons why people do the things they do

In short the answer was to get to people's real emotions, their needs and wants....in video consumption of course

Viewers don't use the same terms as us



For a start "normal" people don't talk about this stuff like we do.

They haven't heard of "transmedia story telling" or "big data"

Viewers lumped their media into three chunks which were mostly defined by the interface used and where the content came from.

So Live TV and stuff on the planner was mostly referred to as "TV" – although the **longer** something sat in your planner the more it felt like an on demand experience.

Broadcaster on-demand services and other on-demand stuff **that** delivered film and TV was called "On-demand" and sometimes "Catch up".

And what many of us would call social video – the likes of YouTube and clips in Facebook - was just called "Video". And they were more likely to cite the platform name than the originator of the content.

Getting to the answers was hard

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We have tended to use CCTV style ethnography in our Screen Life research but we had two main problems with that this time

Firstly VOD can be viewed anywhere at anytime, we couldn't possibly start setting up cameras in peoples bedrooms, although I did think twice – and of course CCTV capture only works for in home, VOD media is available everywhere

Secondly you can see here filming someone is not going to tell us much about the state of mind or needstate someone is in.

This man is changing mindset right in front of our eyes

So how do we work out what is going on?

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Boom

As you can see, not much difference outwardly as the difference is within



The Observation

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



Uses mobiles to get up close and personal

Deprivation task

Get beneath claimed behaviour

So we developed three main stages for the work along with our research partners Flamingo and Tapestry

Firstly there was a large observation stage with people filming themselves as well as us filming them.

We got them to use mobiles because as it allowed us to spend long periods of time with our viewers and it is amazing what they will reveal

And they reveal even more when we were a bit mean to them.

Central to the approach was a deprivation task where we removed their TV and their VOD for 4 days each - working on the premise that 'you don't know what you what you've got till its gone'

Right away this approach helped us get beneath claimed behaviours and see what was really going on

Straight away our research revealed a number of apparent contradictions in consumer behaviour...

A stand out one was that people often claim to almost exclusively watch VOD content

...but it accounts for a tiny proportion of total viewing

Nevertheless when we took it away people did miss it felt it too. We have lots of footage of them moaning about the inconvenience of it all.

People found it fantastic at delivering content. And life without on demand could sometimes be a bit frustrating and boring.

**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?

So it begs a question: if VOD offers the ultimate experience of exactly what you want, whenever you want it, wherever you are...

The purest and most perfect piece of tailored entertainment if you will...

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

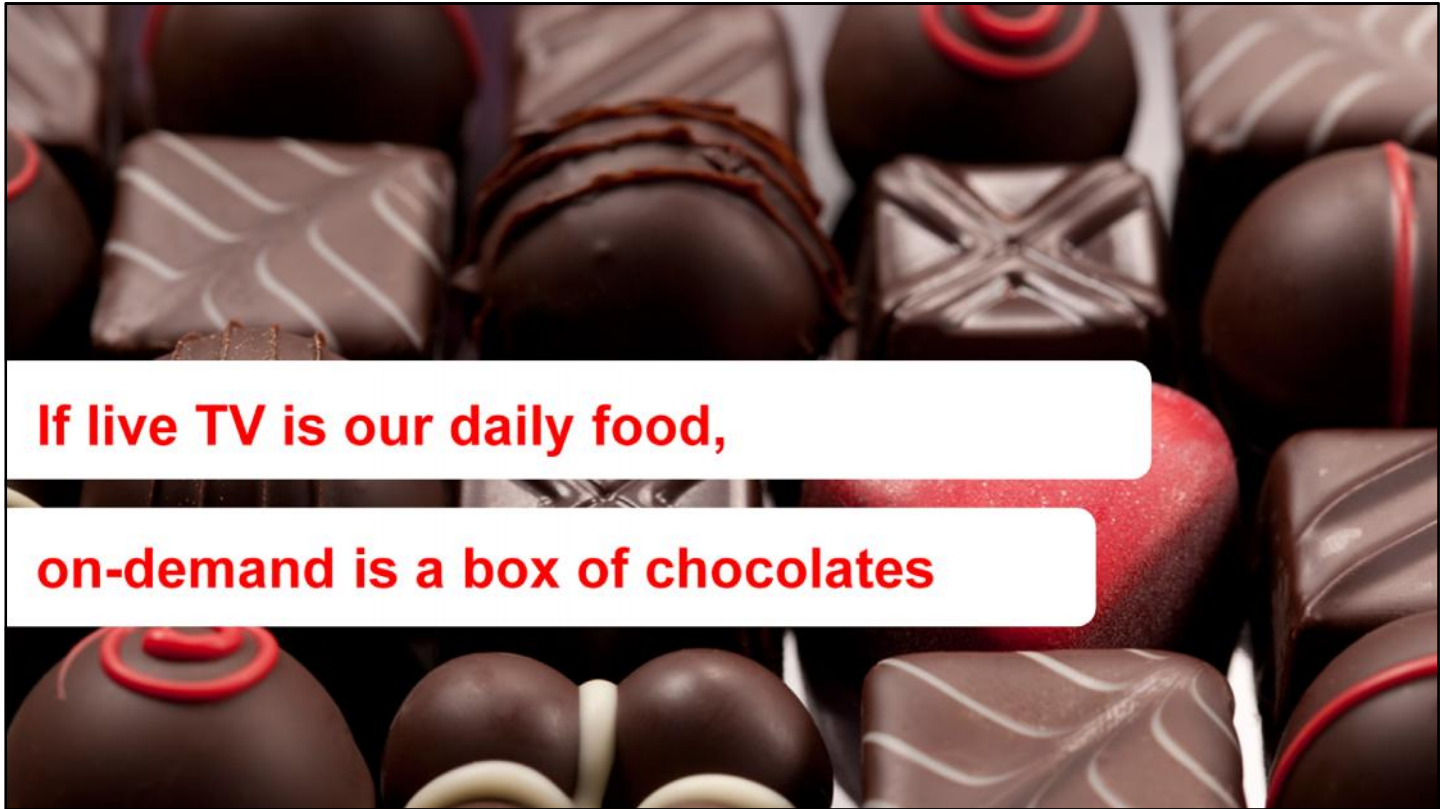
Well the answer lay in what we found when we took away live TV

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

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Deprivation of live TV

Here's some of the footage we captured



If live TV is our daily food,

on-demand is a box of chocolates

Our viewers sorely missed both TV and VOD – the difference was – Beforehand they were confident they could easily live without ‘normal telly’ and feast solely on on-demand.

But, once linear TV was gone, these people developed a form of televisual cold turkey when they realised how much they missed it.

With VOD it was like you’d taken their box of chocolates away, a treat or indulgence, it frustrated them - its like TV had gone back to the 90s.

But when their live TV was removed, it was altogether more fundamental – it was like we’d taken their food away from them and suddenly, some deeply important human needs became extremely difficult for them to meet

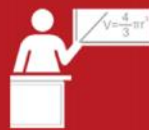
Even though on demand offers whatever you want when you want it

...it turns out... on demand doesn’t satisfy all the things we need and demand from TV



The Experts

- Semioticians
- Sociologist
- Behavioural Economist
- Cultural intelligence



This phase is about interpreting what people have said and what they mean

Developed a needstates model to reveal the underlying human motivations that drive behaviours

So our next stage was pour over the hundreds of hours of footage with the experts in order to understand their deeper emotional needs

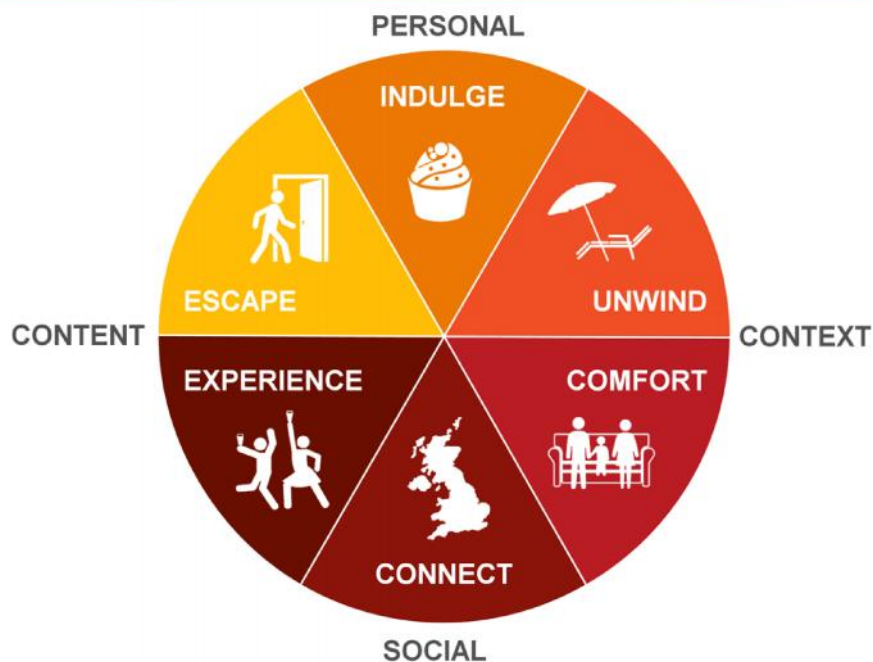
We also brought in an army of experts to help interpret: a semiotician, a sociologist, a behavioural economist...,cuddly toy, fondue set

Through their research, they developed a needstates model that allows us to tackle all of that complexity and **REVEAL the underlying human motivations that drive choices and behaviours in any given moment.**

The research identified 6 core needs from video

Research reveals 6 needstates in video

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And here it is

We have Personal vs. Social on one axis, or Inner directed needs v outer directed needs

And in broad terms, the three needstates on the right – Unwind, Comfort and Connect – are driven by context. They are less about the specific content and more about the social environment and personal situation of the audience.

The ones on the left – Experience, Escape and Indulge – are more about the content. It involves a more active selection of a programme.

You'll notice there is no 'relax' need state. This is because what we found was that every time a needstate was met, the viewer felt more relaxed. So we have invented 6 different words for relaxation.

Let's have a look at them quickly

THE NEED TO UNWIND IS ABOUT DEFERRING THE PRESSURES OR DE-STRESSING FROM THE PRESSURES OF THE DAY



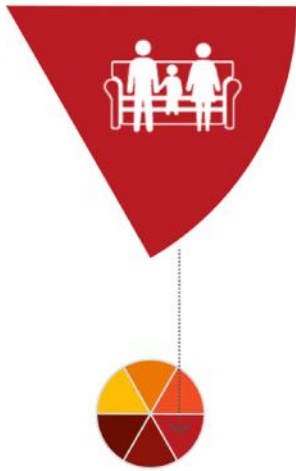
“ Usually I'll come home after work and just put TV on and slowly fall asleep. It doesn't matter what's on, it could be something I've seen 20 times

”

Young Family, Manchester

Unwinding is about relaxing after the stresses and pressures of the day and involves the least taxing, most un-demanding content. It is a positive excuse to do nothing, TV as a soother.

Come Dine With Me is a good example of a show to help you unwind and centre yourself for the evening.



THE NEED FOR COMFORT IS THE NEED FOR SHARED FAMILY TIME. WE SEEK TOGETHERNESS, RITUALS, FAMILIARITY AND ROUTINE



“After dinner, we'll all sit down round the sofa and watch The Simpsons or something like that. It's not about the programme though, it's about having that time together before doing our own thing later on”

Older Family, Manchester

The need for comfort is all about cosiness, warmth, familiarity and routine.

It is broad appeal, recognisable programme formats, watched with your family and friends – TV as the modern hearth.

So watching The Simpsons or the One Show with the family. But it's not about the programme though, it's about having that time together before the kids either go to bed or go and play Xbox and we have adult time.....in TV terms of course



THE NEED FOR CONNECTION IS THE NEED FOR A SENSE OF 'ANCHORING' – TO FEEL A SENSE OF CONNECTION TO PEOPLE, TO TIME OR TO PLACE



“ NO TV for four days? But I'll miss Geordie shore. It's not fair, all my friends will be talking about it, I'll have to avoid Facebook for the next four days! ”

Male teen, Manchester

The need to connect is not all about connecting to each other, it is more about plugging into the country.

It roots you in a time and place. TV brings the public world into your private space.

There is a person on the other end. Things are OK, life is ticking over, but you just need to check that world is still turning....

I tend to imagine it as that urge to put on BBC World when you are in a far-flung hotel room.

But it's not just about news, it's about keeping up with the conversation too. You need to be in the know. That may be politics for one person and the latest on TOWIE for another.



THE NEED FOR AN EXPERIENCE IS THE NEED FOR FUN, ENERGY AND A SENSE OF OCCASION. EXPERIENCES CREATE THE GLUE THAT CAN BIND FAMILIES, FRIENDSHIPS TOGETHER



“ We love Ant and Dec's Saturday Night Takeaway. Every Saturday we watch that, get into our PJs. and get a takeaway ”

Young Family, London

The experience needstate is all about being at the party.

It's the stuff that is highly social and creates the glue that binds friendships and even the nation together – the unmissable is really still missable ...so you need to be there in front of the screen to enjoy it with everybody else.

As you would imagine big shared viewing occasions dominate the experience need.

It is all about being there, experiencing the event together, sure you can watch it on catch up, but the adrenaline is lower.

THE NEED TO LEAVE THE 'EVERYDAY' BEHIND.
HERE, TV ACTS AS A PORTAL TO ANOTHER
TIME AND PLACE ENTIRELY



“ Me and my husband love watching Game of Thrones after the kids have gone to bed. We record it because it can be quite explicit. We love it, it's basically total fantasy ”

Older Family, Bristol

Then we have the need to escape....The need to leave the monotony of everyday behind us.

So TV can transport you to another time and place.

This is often high quality, international, highly compelling drama. Imagine watching Mad Men or Game of Thrones.

These are the shows that you would like the outside world to know you watch. You are particularly proud of these ones.

You think they are your discoveries that you share with a few other cool mates. Like those bloody Danish dramas everyone bangs on about.



INDULGENCE IS ABOUT YOUR TRULY PERSONAL FAVOURITES, NOT GENERALLY SHARED BY THOSE YOU LIVE WITH. IT'S ABOUT SATISFYING YOUR (TYPICALLY GUILTY) PLEASURES



“ I get in around 9:30 a.m. after dropping the kids off. I put on Real Housewives, or some other show my husband can't stand and get out some biscuits, it's pure indulgence **”**

Young Family, London

And finally Indulgence is about getting what you want, when you want; satisfying your often guilty pleasures, often on your own, watching something of purely personal interest. Private 'me' time.

Indulgence is all about personal favourites, this is the stuff that planners are stuffed full with.

It could be Gardeners World , Peter Andre's 'My Life', or a documentary on The Grateful Dead. Whatever floats your boat really. This is the real private you. It's the late night cross dressing of video.



The Validation

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



74% of our sample use VOD at least once a week (vs 17% est)

26% subscribe to Netflix/Lovefilm (vs 16%)

100% own a smartphone (vs 53%)

46% own a tablet (vs 30%)

The next stage for us was to populate the model. We needed to know the size of each needstate, the composition of each – device, content, and context - and of course how people respond to advertising in each needstate.

We collected data as close to real-time as possible using the same style diary app the IPA Touchpoints study

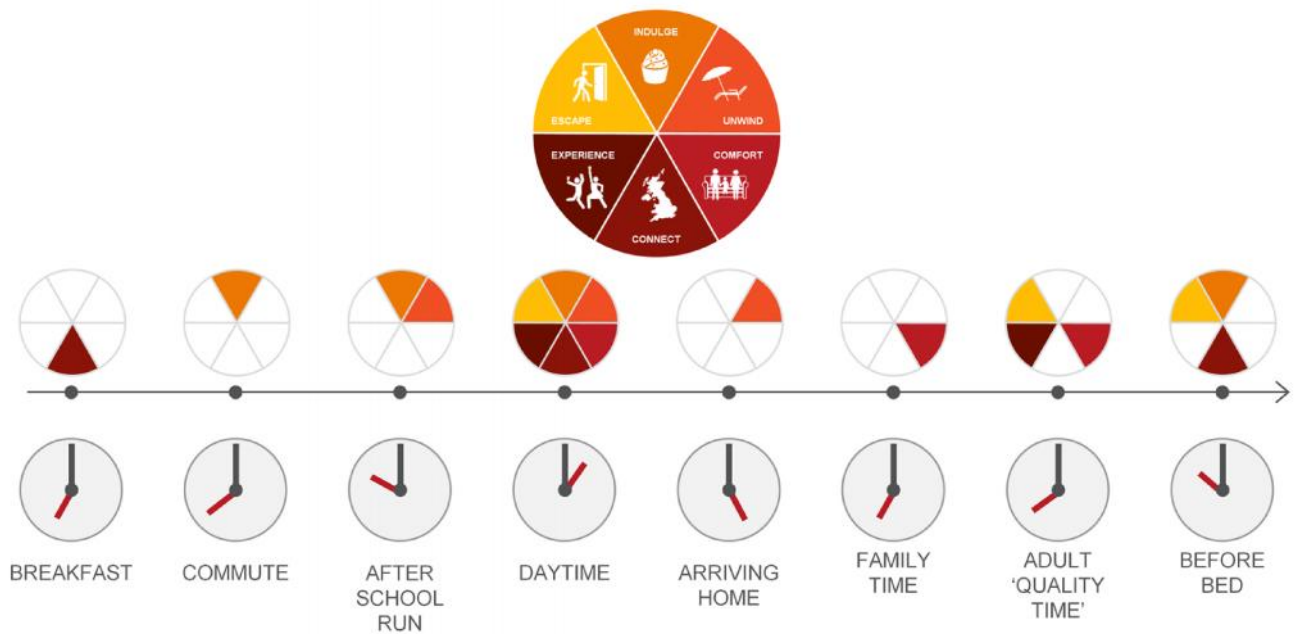
Consumers are good at telling us what they have just done, so we asked them and captured behaviours 'in the moment' along with a follow up survey

And we wanted to future proof our work so we recruited a VOD using tech savvy sample.

Of course we have a mountain of data, a few highlights

Weekday needstate timeline

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Needsates change throughout the course of the day and week.

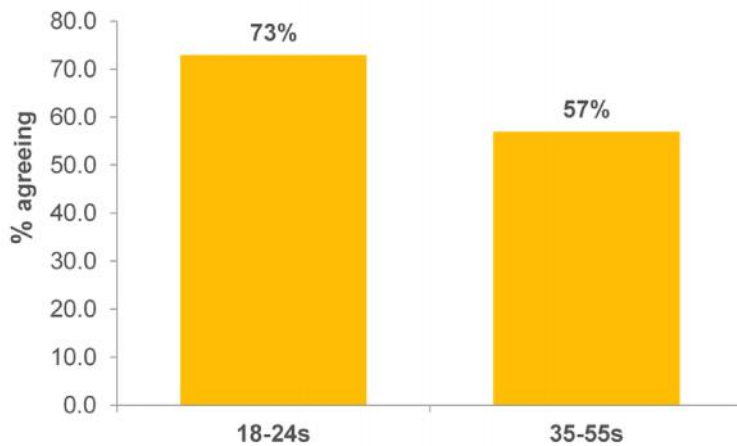
For example the research found that you are more likely to need to connect in the morning or before bedtime.

And you are more likely to escape and indulge yourself on your commute or perhaps for a while after the hectic school run.

Not all age-groups are the same

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

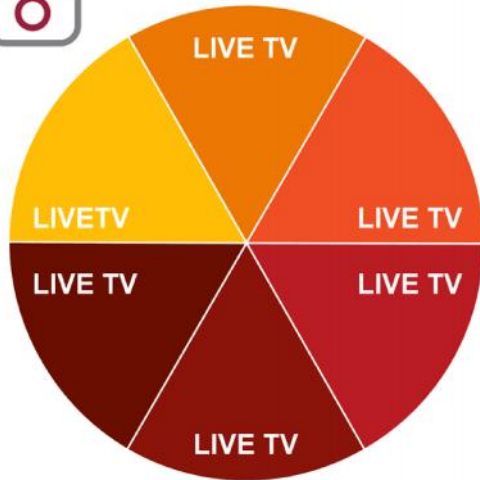


18-24s spend almost twice as much time in the connected need state as 35-55s (28% v 15%)

And not all age groups are the same,
as you may expect, younger people are much more likely to be in the connect needstate,
they have fiends and social lives....and want to part of their groups conversation.

Different video formats best suit certain needs...

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...but live TV delivers on every need

We have established that different video formats better suit certain needs

...but only live TV is capable of really delivering on every one of these needs in volume

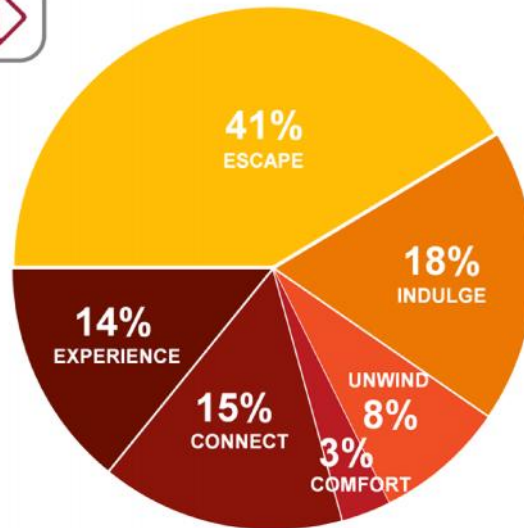
This explains why live TV is often the first place viewers start when sitting down to watch television

Even among the VOD-using audience for this study, 60% typically first looked at what's on (on live TV) before doing anything else.

So let's break it down a bit.

VOD excels at meeting the escape need state

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VOD is about delivering great content when you want it, therefore the Content-based needs – and Escape in particular – are much more likely to be met by this platform;

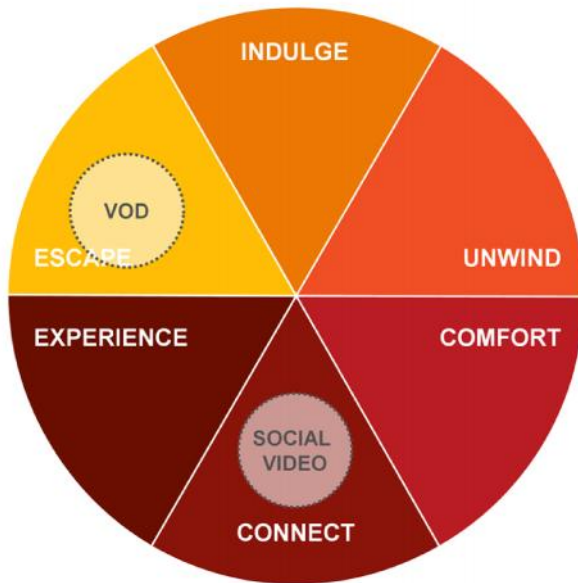
at the expense of context-based needs like Unwind, Comfort and Connect.

Because VOD doesn't meet the full spectrum of needs in the way live TV does,

it's not a replacement for live TV but a 'boost' when you need it.

Social video is not the same as VOD

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Device - Social video on PC, tablet and mobile

Content - Both high attention levels, VOD more planned to watch

Context – solo and out of the living room

Connecting with others

Conceptually there is a lot in common between social video and VOD, but in reality they are very different platforms.

The device is much more likely to be PC, tablet and mobile

Attention is high on both VOD and social video but VOD is more planned to watch and social video more spontaneous

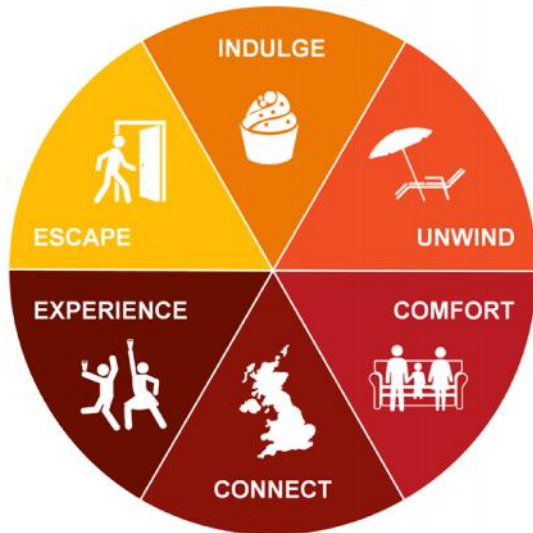
Social video is much more likely to be watched alone and out of the living room

Also, it's more about connecting with others by watching the video of the moment

If we think of VOD as being content that they like to watch; social video is more about content that they watch to be liked.

Advertising works differently according to needstates

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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.

Most importantly is that advertising will work differently and better or worse according to which needstate a person is in.

You are simply going to be more **accepting** of advertising at certain times in your day and when you are in a certain frame of mind.

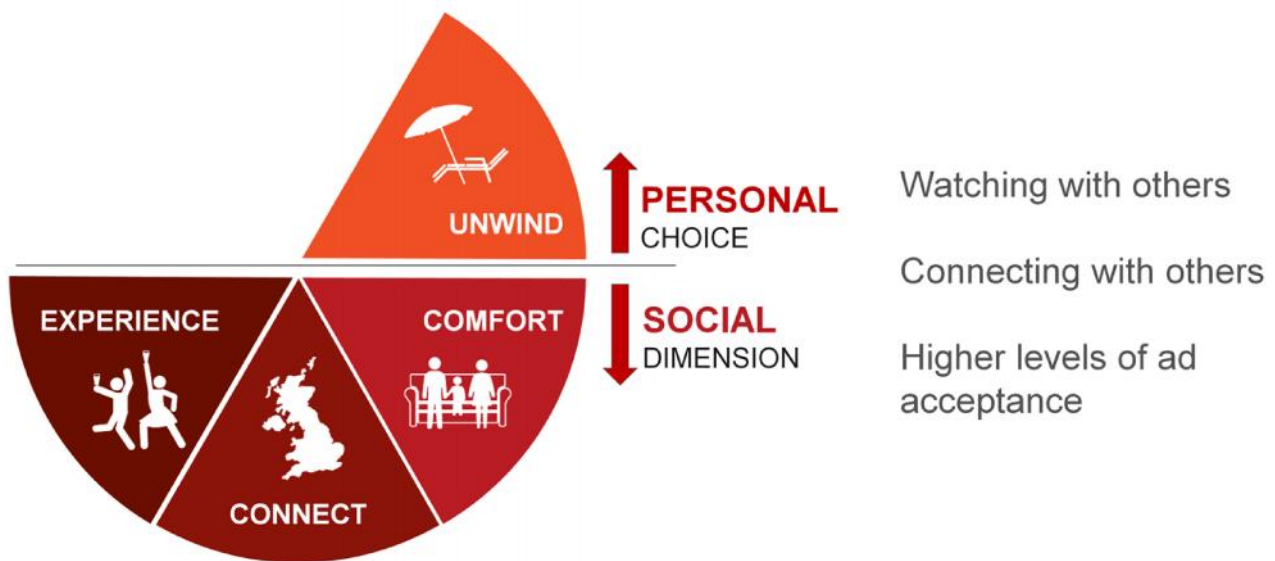
We already know a great deal about how the brain processes messages and makes decisions and that **congruency** plays a vital role.

Advertisers need to match need states with categories, tones and narratives. Doing so should deliver much better results for your brand.

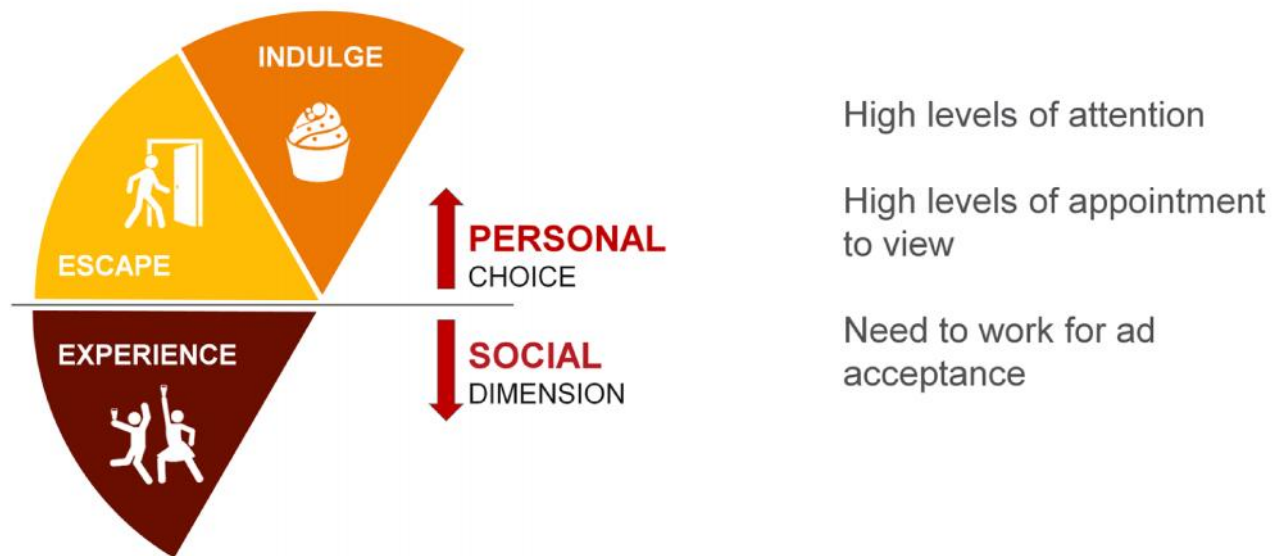
This is another presentation in itself but.....it all in my opinion boils down to relevance

Advertising in context-based needstates

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We found that there was higher levels of ad acceptance in the context based needstates, these need states are stronger on the social dimension and your mind is less fixated with the content and so the advertising plays a part in the natural rhythm of the TV experience.



You need to work harder on your advertising in content based needstates.

That's not to say advertising is less effective in the more content-driven need states

These occasions are typically higher attention and therefore more challenging environments in which to advertise – and there is likely to be a higher degree of risk and reward.

By understanding needstates one can minimising the risk of failure



CATEGORIES: brands that build identities

POSITIONINGS: you are special

NARRATIVE STYLES: include the consumer in an elite group – be an insider

TONE OF VOICE / AFFECT:

Aloof, aspirational, exclusivity, exotic, 'beautiful'

For VOD this is about understanding when a viewer is trying to escape or indulge in their favourite TV and then delivering creative formats, content and narratives that perfectly match their mind set.

For example the ESCAPE is the most challenging to advertise in – so the best way to leverage this most powerful needstate is to have advertising that 'fits' escaping,

Particularly suited to brands that want to build an 'identity' for the consumer, to offer them status or 'cool' – luxury, stuff that offers social and cultural capital

We know you have chosen to watch Mad Men, so we know you'll want to be part of our elite group that uses this brand.



NEEDSTATE

Understanding Content, Context and Device to make advertising work harder



MOBILITY

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



INTERACTION & RESPONSE

Deeper brand immersion experiences.
Stepping stone to advertiser websites



ADDRESSABILITY

Additional ability to deliver personalised advertising

So understanding VOD's strategic role for advertisers now and in the future will be about using the new tools and formats it can offer to target, personalise and enhance the experience that is already highly engaged.

We need our VOD advertising to help people indulge and escape and match the needs they are already in.

Luckily we have lots of we can do

More Validation and Tools for Planning



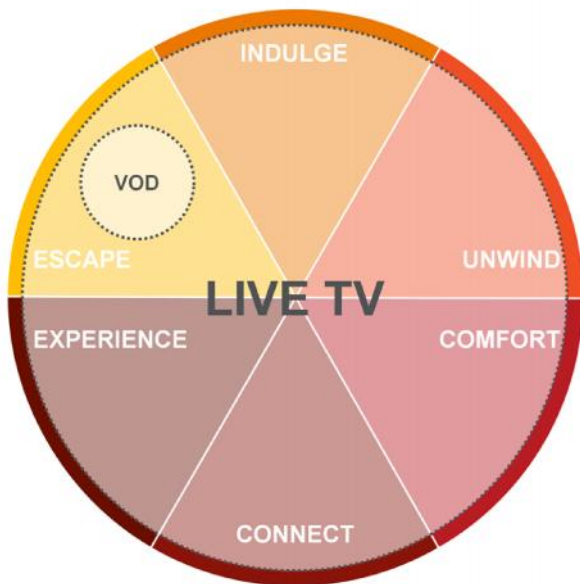
For us the next step is more validation,

this time on a nat rep sample and then we are looking to help inspire planners with some nifty tools to place their brands with programmes and viewer needstates.

And give guidance on how to satisfy them and how advertising fits in perfectly with each type of experience.

What have we learnt so far?

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Video on demand is helping TV viewing to grow

Ads in live TV and VOD can do different jobs

Screen Life insights can add an extra layer to your planning

So what have we learnt so far?

Well, VOD is helping TV to grow as viewing is incremental to linear TV.

The two co-exist and can play different roles...

Ads in live TV and VOD can do different jobs so it's about working as hard as possible, minimising the risk of failure

Going to work for the viewer

Of course we hope this is going to help planners answer those cross platform questions and add some deeper insight into their process.

Man cannot live by VOD alone

If VOD was all we wanted, we wouldn't watch anything else

But we watch TV content to meet a range of emotional needs,

some of which VOD is amazing at but some which it can't easily satisfy. But live TV can do everything.

Man cannot live by VOD alone.



So to finish....we think this work might have profound implications for some of our colleagues in other media.

It appears that when you take away live TV strange things can happen....

Thanks for listening

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