Capturing attention on TV

Admap, September 2018

Until now, TV viewing has been remarkably resilient despite the overall proliferation of digital media. As far as Belgium is concerned, in spite of the growth of (mobile) internet, the booming adoption of smartphones and the attractive offers made by subscription video on demand (SVOD) players, consumers have maintained their loyalty to their traditional TV screens: 10 years ago, people aged 12 and over spent an average of three hours a day in front of these screens, and today they continue to view as long, if we take into account 23 minutes in time-shifted viewing. However, advertisers regularly ask the (right) question:'OK, viewers sit in front of their TV as long as they used to do in the past, but are they as engaged as they were, when years ago they had less potentially distracting devices at their disposal?' In other words, are the audience engagement values worth the same as in the past?TAM (television audience measurement) does not provide direct answers to this question, since it only reports on 'presence in the room, technically able to watch TV' (the precise definition of TV viewing in Belgium), but does not provide clear evidence on actual attention. Aware of this lack of insight into the topic, in spring 2016, Space conducted an online survey among 1,181 Belgians aged 18 and over. The questionnaire examined declared attention levels to TV programmes, by genres, but also by dayparts and weekdays. This survey helps develop a more qualitative view on TV planning and scheduling as it promotes the value of context.

Somewhat ironically, the questionnaire about attention also covered distraction. Respondents were asked about what they were doing when not watching attentively. Mobile devices came first in terms of activity but the use of a smartphone or tablet during TV viewing sessions is most often reported as 'not linked to the programme' or 'for other purpose' (37% of respondents). Routine tasks such as household cleaning and preparing meals were second (28%), chatting with other people is another common activity when distracted (13%), while eating comes next (6%). Activities related to what viewers are watching are rather infrequent: 'sometimes chatting about the content' is reported by 11% of respondents, while using a mobile device in activities linked to the programme is even less common (only 4%). As a general conclusion, the larger part of distraction has nothing to do with the content on TV, and second screening is (still) not the norm.

A large part of the questionnaire addressed 11 programme genres (including advertising) that are listed in Figure 1. For each of them, respondents were asked about their reasons for watching: is it usually their own choice; is it something they accidentally watch as a consequence of zapping or is it generally other people's (for instance relatives' or parents') choice? Next to this, attention or distraction was captured via four modalities: engaged (attentive and second screening related to the programme); attentive; distracted but not doing something else; or distracted and doing something else. As shown in Figure 1, the programme category most often chosen personally is films; it is also the one that is reported as most attentively watched. Generally speaking, the programme that respondents choose themselves is also the one they are most likely to pay attention to. Not surprisingly, information magazines on TV prompt their viewers to search for information or interact online (to be engaged) more than any other programme category. And news comes second for this metric. Shows aimed at children are rarely selected by respondents themselves and therefore watched with the lowest levels of attention. In fact, these programmes for children (when watched by adults) only slightly differ in attention from advertising. Advertising as a 'programme genre' generates little claimed attention, albeit it was expected to be even closer to zero in people's declarations.

Figure 1: Choice and attention by genre

% of all respondents	Chosen	Engaged	Attentive	Engaged + attentive
films	69,0	8,1	68,3	76,4
news	62,6	9,9	50,6	60,5
series	50,7	4,9	47,8	52,7
magazines	41,6	12,6	39,0	51,6
documentaries	30,9	5,4	36,2	41,6
entertainment	33,3	4,8	30,1	34,9
live sports	25,5	3,5	23,0	26,5
sports shows	26,4	6,3	20,2	26,4
reality tv	25,0	4,7	16,8	21,5
kids	3,3	1,2	4,3	5,5
advertising	3,6	1,8	2,1	4,0
all genres excluding advertising	**36,8**	**6,1**	**33,6**	**39,7**

Interestingly, the programme genres and dayparts that respondents watch more are also the ones that are most attentively watched. But one might argue that is all declarative, and that people do not do what they say. That is why we compared declarations from respondents of the survey and measured TAM data for the same target groups and time periods. Generally speaking, programmes and dayparts that our respondents claimed to watch the most are also the ones that get the largest ratings in the TAM data. But we also found fair correlations between high ratings programme genres or dayparts as measured by TAM data and reported attention levels in our survey: the more popular a programme is on TV, the more attentive are the viewers it attracts. Conversely, low ratings are generally in line with lower attention reported.

The specific analysis was undertaken with regard to respondents aged 18-54. It found a moderate correlation between daily reach of programme genres and reported attention (Pearson's coefficient = 0.55; $p = 0.01$). The coefficient found between daily reach of dayparts and claimed attention was a bit higher: 0.67 ($p = 0.003$). Statistically significant correlations were also found between viewing duration and attentiveness but they were lower than the ones we observed with reach. Correlations between dayparts viewing in the TAM results and attention were higher than those measured for programme genres and attention. This difference may simply be the consequence of an easier-to-understand and less ambiguous definition:a question on watching during the weekend between 5 and 7pm is more obvious for any individual than categories like'series' or'reality TV' for instance, which might be seen differently by respondents versus what TAM typologies classify as a series or reality TV.

Based on the statement that 'high reach generally equals high attention', it seems that the double jeopardy law, as defined by Byron Sharp, may somewhat apply to TV attention as well. As explained in *How Brands Grow,* small brands are at double risk: first, they have a lower buyers' base, resulting in lower revenues; and second, their loyalty levels are smaller than large brands. Hence the double jeopardy that threatens them. In terms of TV, 'buying' could be translated into 'viewing' and 'loyalty' into 'attention'. So the double jeopardy law may also be valid for TV programmers. Beyond that, the learning for advertisers is that high-ratings programmes are still key for television effectiveness as they are likely to generate more attention.

Unsurprisingly too, older people in our sample are more likely to attentively watch TV programmes. Upmarket people, younger respondents, or individuals living in households with children are less likely to report high attention levels to programmes. Interestingly, these segments are also the ones who generally own more screens and portable devices than the rest of the population, and our survey also shows that mobile is most often used for other purposes than interacting with programmes or socialising about them. We must however emphasise that primetime TV with higher ratings tends to be watched more attentively by all demographics, including the most elusive ones.

What's next for TV planners and advertisers?

Fragmenting audience levels today often lead to schedules with dozens of small rating spots. Our survey on attention however shows that a part of these schedules still needs good old programme environments with high reach levels – they seem to provide advertisers with significant bonuses in attention. The additional cost for these premium contexts is in our view balanced by the additional impact they provide. As recently emphasised by Les Binet and Peter Field in their *Media in Focus* report, high-reach media such as TV are still key for advertising effectiveness. And within a high-reach medium, such as television, popular programmes and dayparts still make perfect sense for advertisers. Instead of simply adding GRPs at the lowest possible cost, taking a look at programme contexts should provide extra impact to campaigns.

In addition, our survey also showed that the programmes people choose themselves are more likely to draw their attention. Here, rating figures are not always helpful. For TV planners, identifying programmes that their target groups might want to watch is not an easy task. In our view, the personal choices of audiences might however be anticipated by following reviews of TV shows in the media and, of course, refined social media listening. The latter may help identify what groups of consumers consider must-see television content, that they afterwards could actively select for their television menu. Of course, this does not provide certainty to advertisers, but it is a way to reappraise the value of context. TV advertising must not be only about summing ratings, even in sophisticated ways, but also about trying to discover what appeals the most to the audiences we try to connect with. Getting the attention of consumers, old and young, is also a matter of knowing what they like.