



Second-Screening: Opportunity or Threat?

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A White Paper, by:

MEDIACOM
People first, better results

and

 ViewersLogic



The Big Myth

In recent years many have believed that there is a significant threat to the advertising and television industries as a result of the second-screening phenomenon

The argument underpinning this view has been that as a result of second-screening during ad-breaks, the effectiveness of TV advertising has been falling

In being distracted by their mobile screen, viewers are thought to be paying less attention to the ads appearing on their TVs, and are therefore less predisposed to reacting to those ads in a positive way



We discovered
three truths
that run counter
to the myth

Truth 1

As a result of second-screening, the direct-response rates for TV advertising are much higher. It appears that although partially distracted, people are still engaged with the content of TV advertising, and can now also react immediately because they have immediate internet access in the palm of their hand

Truth 2

Even for brand image ads, where immediate response is not a primary communication objective, we are seeing no shortfall in advertising effect versus those viewers who are not second-screening.

Truth 3

As a result of second-screening people are zapping less frequently, and programme view-through is consequently higher



Methodology

ViewersLogic uses the consumer's mobile device to collect information about TV and second screen viewing. On each individual, the App passively collects their TV viewership (content + advertising) and their mobile phone usage including searches, web browsing, online purchases, online ads viewed, applications usage, offline store and cinema visits, and more.

Panel information

ViewersLogic maintains a representative panel of 4,500 users in the UK. All data on these users is collected by the app in an entirely passive manner.

For the purpose of this report, we also conducted a pre- and post- online awareness survey among a sub group of 600 of ViewersLogic's panellists (again, representative) who self-completed a questionnaire.



ViewersLogic

Single Source Platform



VL'S PANEL




MEDIA PLANNING TOOL /
DATA SOURCE


CAMPAIGN ANALYTICS



TV VIEWING DATA:

- Channel Viewed
- Ads Viewed
- PVR
- VOD
- In-House Location



BEHAVIOUR DATA:

- Applications and usage
- Sites visited
- Items browsed
- Online purchases
- Search activity
- Online ads viewed
- PC / Laptop usage



LOCATION | SOCIAL

- Location Data
- Store Visits
- Social activity
- Outdoor media





Detailed Results



Truth 1

As a result of second-screening, the active response rates for TV advertising are much higher. It appears that although partially distracted, people are still engaged with the content of TV advertising, and can now also react immediately because they have immediate internet access in the palm of their hand



Active Response Definition and Methodology

Active response' is defined as a site visit or app usage that happened within 15 minutes of watching a TV ad for the same brand

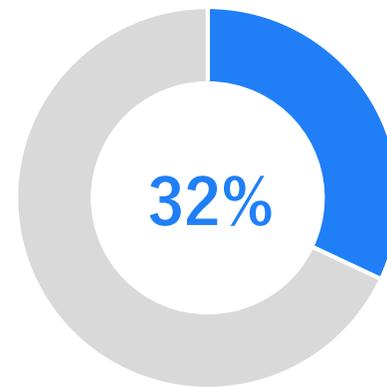
In this research we looked at 4,067 active responses by 1887 people between July 2016 and April 2017.



Second-Screening significantly increases active response

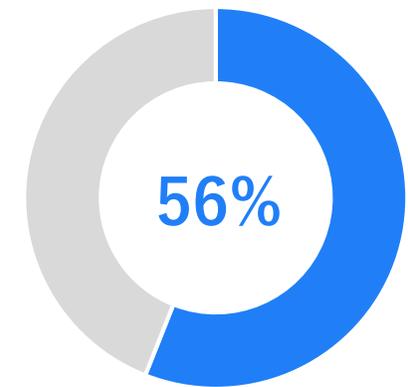
The response rate is improved by a factor of **1.75 for 2nd screeners**

ACTIVE RESPONSE DURING 2nd SCREENING



AVERAGE SECOND-SCREENING RATE DURING COMMERCIAL BREAKS

+75%
→



AVERAGE SECOND-SCREENING RATE DURING ADVERTS THAT WERE FOLLOWED BY AN ACTIVE RESPONSE FOR THE ADVERTISED BRAND

(*) The data refers to people who entered a site or used an app within 15 minutes of watching an ad on TV, of the same brand, between July 2016 and April 2017.

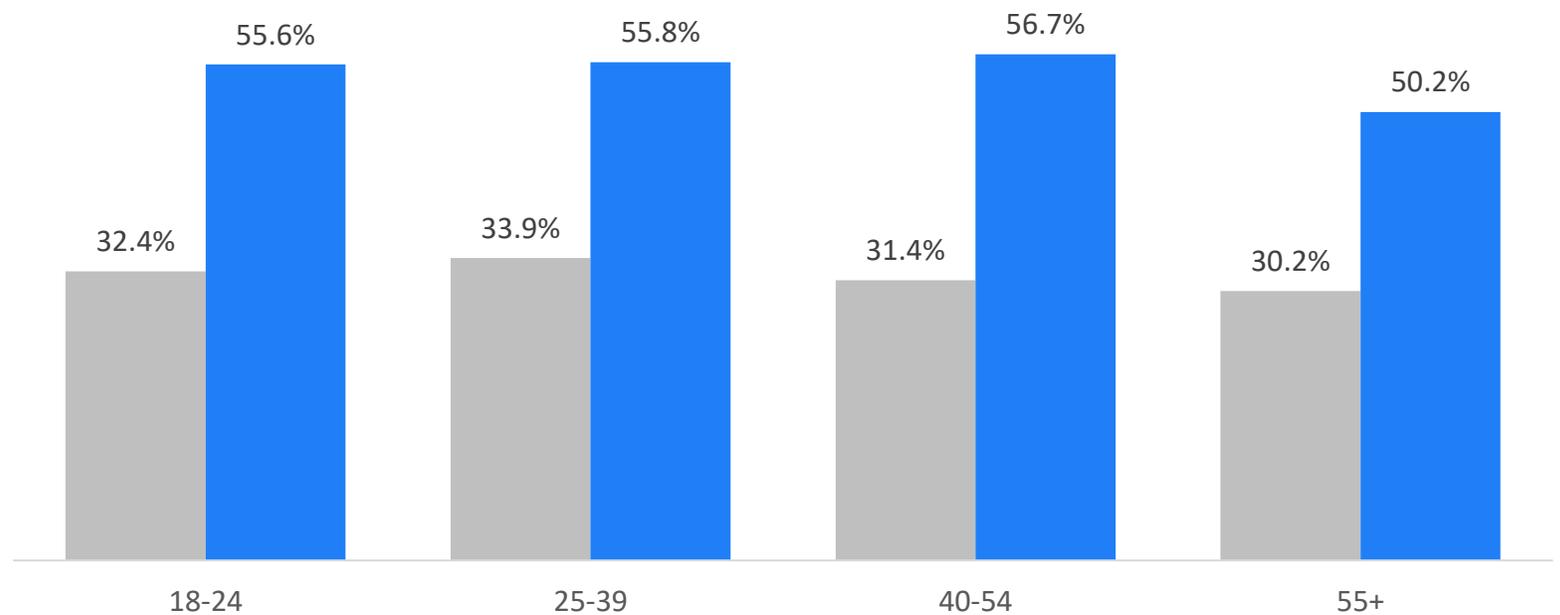
(*) Base: 2017 - 4,218,790 TV watching minutes during ads time, 4,067 active responses and 1887 people.



Active response when second-screening is heightened across all age groups

- 2nd Screening out of population
- 2nd Screening out of Active Response

ACTIVE RESPONSE DURING SECOND-SCREENING – BY AGE

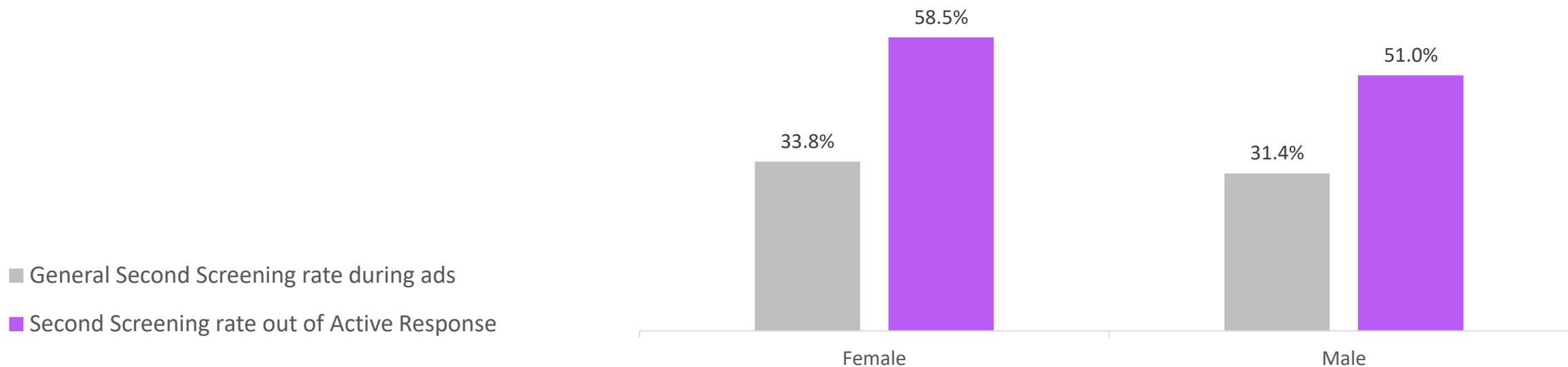


(*) Base: 2017 – 4,218,790 minutes of TV watching during ads time, people: 18-24 (97), 25-39 (801), 40-54 (746), 55+ (194)



And for both men and women

ACTIVE RESPONSE DURING OND-SCREENING – BY GENDER



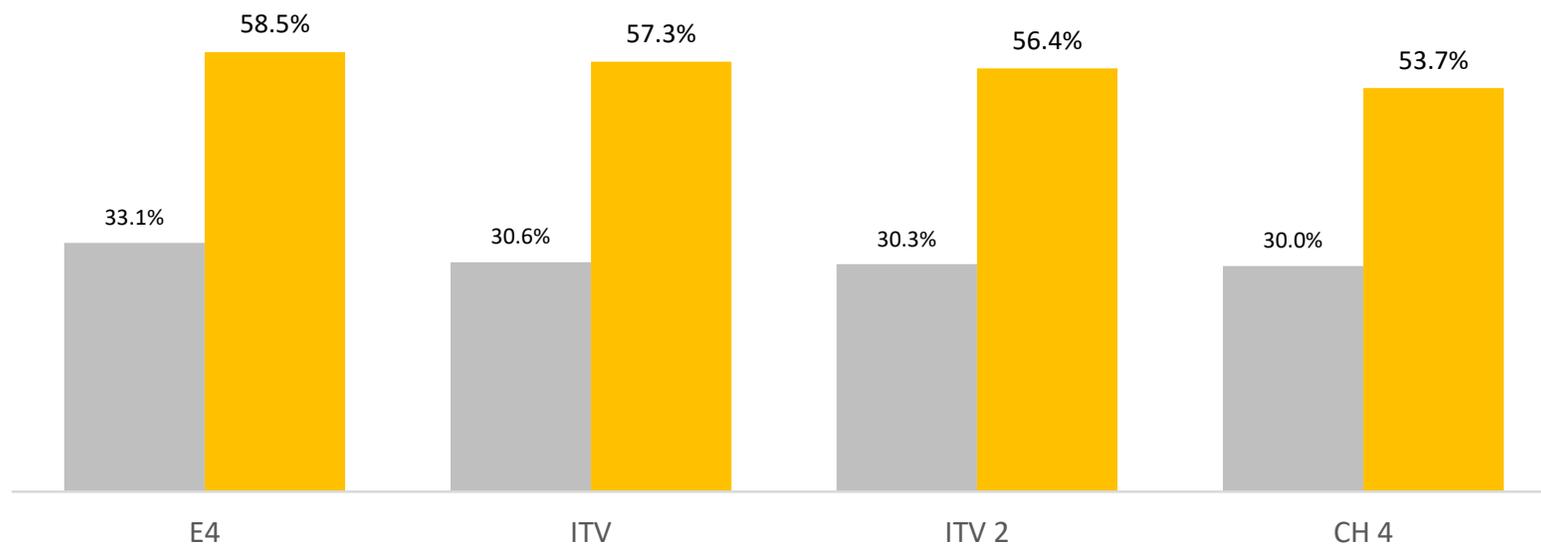
(*) Base: 2017 – 4,218,790 minutes of TV watching during ads time, people: female (1045), male (832)



The effect is also consistent across channels

ACTIVE RESPONSE DURING SECOND- SCREENING – BY CHANNEL

- General 2nd Screening rate in channel
- Active Response rate out of 2nd Screening



(*) Base: 2017 – E4 – 179 people, ITV – 754 people, ITV2 – 174 people and CH4 – 349 people.



Conclusion

When it comes to driving active response, 2nd screening, far from being a hindrance, is a factor for significantly improved effectiveness.

Media plans should take into account the 2nd screening effect in order to improve campaign efficiency.



Truth 2

It is not just response-oriented campaigns where we see a positive second-screening effect.

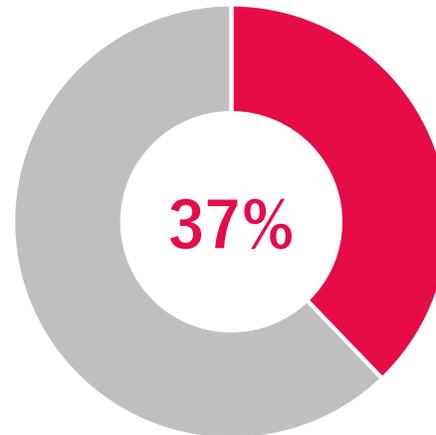
Even for brand image ads, where immediate response is not a primary communication objective, we are seeing a small positive effect in advertising effectiveness versus those viewers who are not second-screening.

Campaign Effect 2nd Screening

Surprisingly, people who saw ads only while 2nd screening were more brand aware than those who saw the ad only while not 2nd screening

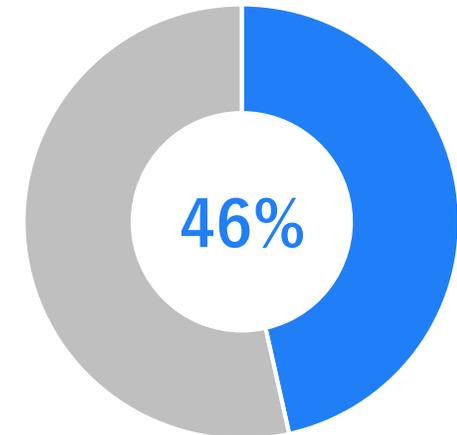
AWARENESS BY SECOND-SCREENING NUTRACEUTICAL BRAND

NOT SECOND-SCREENING



The NOT 2nd Screening group is based on people who saw one or two ads, **both NOT** in 2nd Screening. (148 people)

SECOND-SCREENING



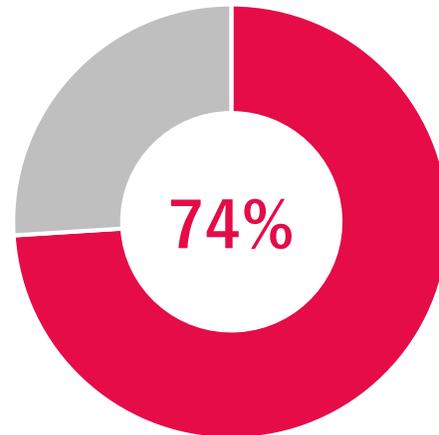
The 2nd Screening group is based on people who saw one or two ads, **both** in 2nd Screening. (43 people)

Campaign Effect 2nd Screening

Surprisingly, people who saw ads only while 2nd screening were more brand aware than those who saw the ad only while not 2nd screening

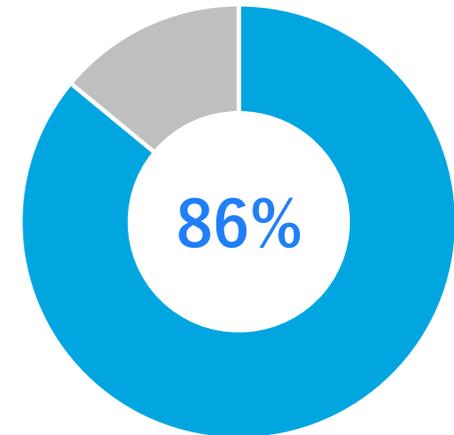
AWARENESS BY SECOND-SCREENING MAJOR MOVIE LAUNCH

NOT SECOND-SCREENING



The NOT 2nd Screening group is based on people who saw one or two ads, **both NOT** in 2nd Screening. (105 people)

SECOND-SCREENING



The 2nd Screening group is based on people who saw one or two ads, **both** in 2nd Screening. (42 people)



Conclusion

People who saw ads only while 2nd screening were observed as being more brand aware than people who saw the ad only while not 2nd screening.



Truth 3

As a result of second-screening people are zapping less frequently, and programme view-through is consequently higher.



2nd Screening's effect on Zapping

The 'Zapping rate' is defined as the **average number of channel changes a user does per hour**.

The zapping rate for each panellist was monitored while they were watching TV without using their phone (e.g. not 2nd screening).

We then calculated **FOR THE SAME PEOPLE** their zapping rate while 2nd screening.

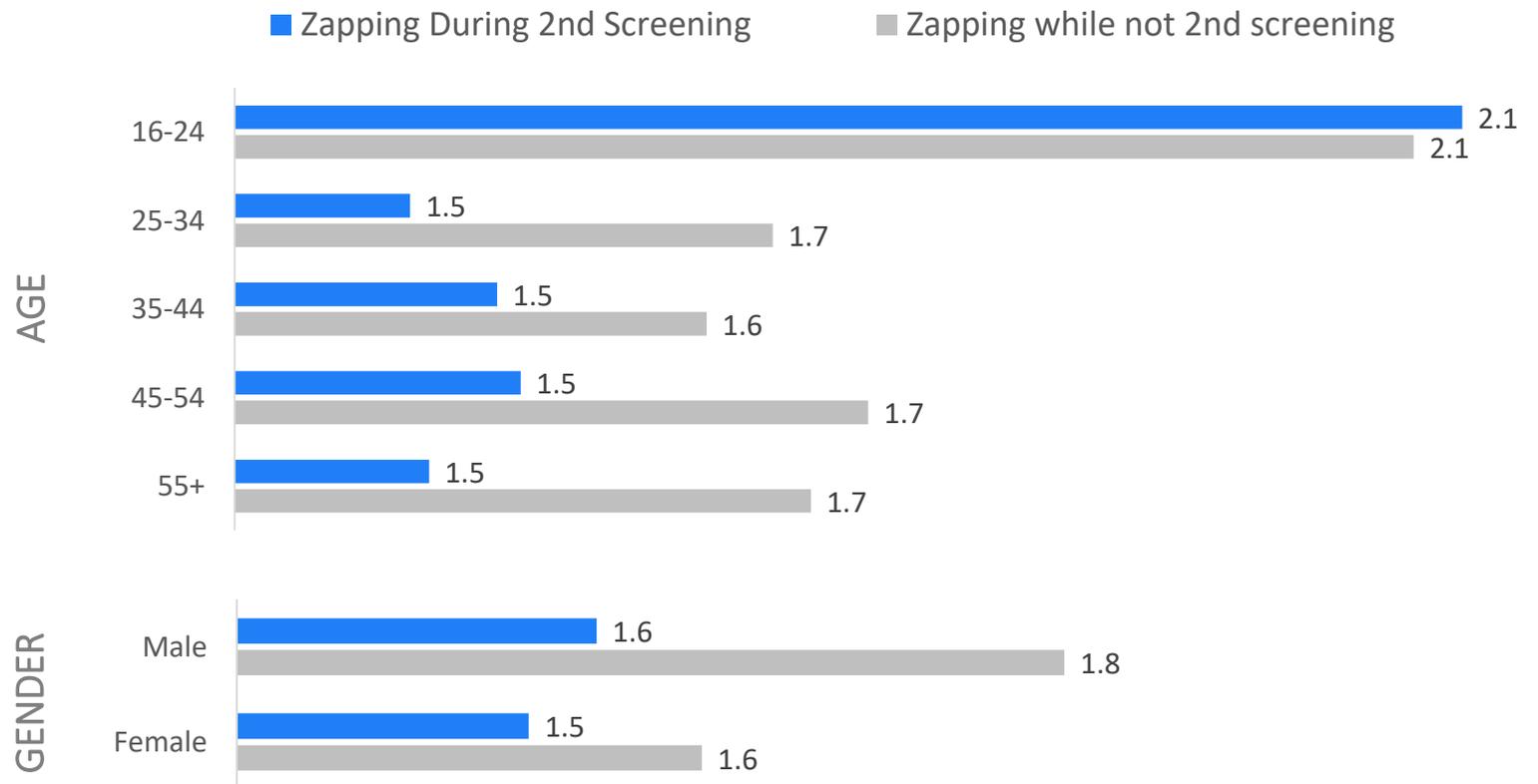
In this way we could check whether 2nd Screening reduces the amount of zapping between channels



On average, the amount of zapping is 10% lower when people are 2nd Screening

(*) The zapping rate represent the number of zapping performed per hour

(*) Base: April 2017 – Age (4,828 people), Gender (4,911 people)





Conclusion

2nd screening indeed reduces zapping rate. The industry has long believed that programme view-through has a positive effect on ad effect, So once again, we are seeing a positive effect of 2nd screening.



Recommendation

2nd screening should be viewed as an opportunity to improve TV ad effectiveness.

Any media plan (especially for active response) should take into consideration the user's 2nd screening behaviour and to place the ads in programmes where second-screening is high.