ACB
Actual Customer Behaviour

Phase 6 Results
Sample of report

I-3-9
Longitudinal Media Lab

October 2013

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Introduction

Since March 2012, when ACB presented the last research findings to members at BBC Council Chambers, there has been a rise in interest regarding use of complementary apps to drive engagement in content on the main screen.

There is much evidence to suggest that second-screen use is becoming increasingly common, rising from 43% in 2012 to a predicted 90% in 2017 in one recent study, while tablet ownership in the UK (currently at 12%) is also set to rise sharply (68% in 2017) (Source: Oliver & Ohlbaum, December 2012).

By comparison, complementary apps still have much work to do. According to a similar study, only 10% of viewers currently access programme website alongside TV viewing, and only 12% have used companion apps while viewing TV (Source: Oliver & Ohlbaum Consumer Survey 2012).

In addition, many consumer electronic companies are now heavily promoting split-screen TVs, hailed as a platform where the 'ideal social TV' experience can happen.

At the TV Of Tomorrow (TVOT) San Francisco Conference in June 2012, content and app developers were working mainly separately to create the new apps designed to complement TV experiences that engage the viewer asynchronously and, even better, synchronously, to keep the audience engaged in live TV. A vote taken at this event revealed that the proportion of attendees was around hundred app developers to one content delegate. However, there were interesting examples that showed the industry had been working 'in sync'. The release of a book by Stephen King was one such case: Plans for the production of a Stephen King series were to be accompanied by three complementary apps, each designed for different types of reader/viewer.

Clearly, there is evidence to suggest that the industry is beginning to find its way to work on niche, easy-to-target fan markets to keep them engaged in longer-tailed content. However, bigger events are where the real commercial opportunities must surely lie.

With big events in mind, it's important to see how the industry can best leverage these insights for more normative viewing, focusing particularly on broad-based audience.

This background drove the emerging interest in ACB conducting an industry-neutral, grounded evaluation of the drivers and barriers of second screen apps, to determine how interactivity with high-urgency TV events can be maximised in the future. ACB also considered the questions that had emerged from members following Phase 5 and wanted to deliver a future perspective that leveraged key events of high engagement in the TV Calender in the UK and also in the US. So ACB ventured on an eight month study focusing on the three peaks of engagement: London 2012 Olympics, the Autumn schedule and the Super Bowl to seek best insights on this subject.

So to begin with, 2012 was the year of the biggest multimedia event in UK TV history: 17 days of the London 2012 Olympic Games in July. The mantra of the BBC was to 'Never Miss a Moment'. With such heavy investment from the media industry in the propensity for worldwide audiences to interact with the Games across multiple screens, there is an opportunity to understand a peak in viewing, and how technology and apps are used by a broad based audience in such highly engaged content.

ACB aimed to analyse the buzz created by content at its most engaging, and the impact on the nation, observing how the content dominated and prompted conversations. We aimed to understand how these heightened conditions drive behavioural change in the audience , and how the appetite to share content takes place, with particular focus on the effect this has on device use.

Other important industry developments driving the need for greater understanding of consumer behaviour included the launch of YouView in July 2012, the emergence of split-screen TVs in the marketplace by Panasonic offering Skype and simultaneous TV; multiple ways to use voice and gesture commands with the new Samsung ES7000 (the first ever TV with an in-built camera); and the impact of increased Video-on-Demand (VoD) offerings via Sky and on mobile devices.

Questions raised at BBC Council Chambers by members, including Microsoft, ITV, Samsung, Sky, BBC and Skype working in industry-neutral clusters, were broad and future facing, and many centred around the issue of how viewers are potentially multi-tasking, using the many options available to them.

ACB is well positioned to address these questions from a qualitative perspective. Indeed, ACB designed the 1-3-9 Media Lab as an industry-neutral, consortium-backed longitudinal research project in 2007, to help the industry gain a better understanding of audience behaviour.

Award-winning research from past phases of the lab has provided perceptive insights into the discrepancy between claimed and actual behaviour, the prevailing dominance of live TV over other forms of viewing, and the power of social drivers in determining the adoption of new technology. ACB has completed industry-neutral research since 2005 and been capturing from all screens including the mobile since 2008, both in and out of the home.

Aims

The 1-3-9 Media Lab has a broad scope that allows flexible integration of research topics from our consortium members. This is inductive research examining emerging behaviours. Rather than testing hypotheses, the lab explores relevant and emerging themes. The specific aim for each phase of the lab is determined at the annual members' meeting for the 1-3-9 consortium.

Phase 6 focused in particular on audience behaviour during peak TV viewing and the use of second screen apps. For this reason, and to be able to provide broad insights into high urgency content viewing, Phase 6 research included analysis of two major sporting events: the London 2012 Summer Olympic Games and the US Super Bowl in February 2013.

In the main, Phase 6 focused on the following key areas of interest, as outlined by the 2012 consortium members:

- How is the IETV interface used?
- What else, besides content viewing, is IETV used for?
- How are apps used on different screens?
- Which platform/device is chosen to watch content, and how does the platform affect content choice?
- The impact of recommendations systems – on TV, through VoD and other applications
- Insights into brand pull. What makes viewers loyal to certain VoD options?
- New technology and broadening the audience
- Demographics and new behaviour

Method

The 1-3-9 Media Lab is a pioneering longitudinal study into audience behaviour. ACB uses video ethnography to capture audience behaviour in its natural environment. Specifically, ACB installs discreet filming equipment into participants' homes, and capture software onto mobile devices, to record both what is happening on all screens and the surrounding real-time behaviour. Prior to capture, participants are hot-housed[1] with new technology.

The sixth phase[2] of the 1-3-9 longitudinal lab included:

- Phase 6 (a) – a study on the London 2012 Summer Olympic Games
- Phase 6 (b) – the main research phase, capturing peak UK TV viewing in Autumn 2012
- Phase 6 (c) – a pilot study of the US Super Bowl in 2013

All parts of Phase 6 used the robust 1-3-9 methodology.

The main part of the study, Phase 6 (b), will be discussed in this report. This year, footage has been analysed to specifically address the questions posed by members.

As part of Phase 6 (b), new technology was added to the sample, including: YouView, Windows 8 on laptops, Microsoft Surface tablets, Samsung Slate tablets with Windows 8, voice and hand gesture controlled Samsung ES7000's and 2012 split- screen Panasonic Smart Viera TVs, as well as 2012 models of Skype TV cameras.

The sample is made up of nine UK families representing early majority users. The viewers are paid for their involvement in the study, and false names are used in any references to their behaviour. All clips and images used have the consent of the participants for sharing by ACB, within their agreed terms of reference.

For a full list of the Phase 6 sample and the latest technology, see sample page.

Filming took place from October to December 2012, and two weekdays and two weekend days towards the end of the capture period were analysed for this report. ACB's unique analysis of footage combines ethnographic analysis, behavioural coding and post-analysis interview. Behavioural coding provides semi-quantitative data on a qualitative sample, which can be used to complement large-sample quantitative research. In this particular phase, ACB has focused on delivering ethnographic analysis to address the questions of the study, as requested by consortium members.

while F12 (the eldest and dominant daughter) uses the Wii to play a game on the main TV, her younger sisters each have access to a tablet, which they are both using to play games

Peppa Pig on the mobile device to entertain her daughter

Figure 11: F20 (Kara Harrison) uses Facebook on her tablet while watching TV.

How can multiple devices enhance the viewing experience?

At 2012 TV Of Tomorrow conference, there was a debate on where the apps should be – on the main screen delivering an interactive experience with optional apps, on the hub, or on the second (or third) screen?

Overall, viewers typically use multiple devices in front of the TV for unrelated browsing, often for keeping up to date with social networks, reading news or online shopping.

F37 (Verity Gardner) values her access to multiple screens in front of the TV, as it *"allows you to layer up what you want to do… if you are being efficient".*

Across the phases of the 1-3-9 Media Lab, we have also observed that multiple screens are often used to create a compromise in the social viewing area, providing individuals with the means to access their own chosen content on a private screen. In Phase 6, viewers rapidly adopted tablets and would soon routinely use them to watch their own content in the social area, when the content on the TV did not suit their particular taste or mood.

Actual: F10, F10 and F12 (Layla, Tabitha and Ruby Andrews) are gaming, sitting across the sofas in the living room. While F12 (the eldest and dominant daughter) uses the Wii to play a game on the main TV, her younger sisters each have access to a tablet, which they are both using to play games too. No-one feels left out and they can all sit in the same room and talk to each other about the games they are playing. Mother F46 (Susan Andrews) describes this as 'competitive interplay'.

Figure 12: Everyone has a gaming device. Twins F10 and F10 (Layla and Tabitha Andrews) are gaming on their tablets while F12 (Ruby Andrews) plays on the Nintendo Wii.

Actual: Routinely, the devices fit into domestic lives and create the perfect peace (cf. the compromise viewing situation in Figure 12). Most mornings, this is the case for Julia Foster (F34) who we saw in the London 2012 Olympic Games study keeping the peace, using Peppa Pig on the mobile device to entertain her daughter (F3), while M32 (Adam Foster) watched the Games – both individuals were highly engaged in their respective viewing. These multiple screens provide Julia (F34) with a way to entertain

There are occasional instances of adult viewers using apps to keep up to speed with one story while watching another – effectively watching two stories at the same time.

Actual: F33 (Nina Irwin-Cole) uses her iPad to access the F1 Timing app so she can keep up to date, while watching her favoured football content on the main set.

Figure 13: F34 (Julia Foster) keeps the peace, using Peppa Pig on a mobile device to entertain her daughter F3 (Rachel Foster), while M32 (Adam Foster) watches the Olympic Games. F3 is now used to viewing multiple screens.

CASE STUDY

3 year old watches content tablet and film from F3 (Rachel Foster) and F34 (Julia Foster) 26.11.2012

In Phase 6(b), we saw emerging new behaviours in F3 (Rachel Foster): her appetite was to watch two screens at the same time, both showing her favoured content.

Actual: F34 (Julia Foster) is watching 'This Morning' on TV, but her daughter Rachel (F3) wants to watch 'CBeebies'. Julia (F34) finds 'CBeebies' using the tablet but Rachel (F3) is not happy with this. She demands to watch 'The Wizard of Oz' on the TV and 'CBeebies', wanting both screens at the same time. Her mother Julia (F34) gives in for a little while. We can see that Julia (F34) tells her daughter off by saying "You're not watching that and that" and eventually persuades her daughter to settle on one screen.

Figure 14: Appetite for a multiple viewing experience: F3 (Rachel Foster) demands to have her content on the TV as well as her preferred VoD on the tablet.

The observation that young children are demanding two screens and perceive that they can follow two stories on two screens, gives us some exciting new insights to work on.

"I love Miranda, so I'd hate to have an app to interfere with it"

Often, viewers were seen using mobile devices to entertain others in the room when the TV content was not engaging these individuals' engagement.

Actual: News is on the ES7000 but neither F46, M18 nor F15 (Kathy, Harvey and Hattie Drucker) are watching. F15 (Hattie Drucker) is singing, F46 (Kathy Drucker) and M18 (Harvey Drucker) are talking. F15 (Hattie) starts playing a song by Basement Jaxx through YouTube on her mother's iPad. The family joins in with the daughter, singing and dancing to the music from the iPad.

Figure 15: M18 (Harvey Drucker) watches 'Never Back Down' on the TV in the back room and simultaneously researches and views images from the film on the IMDb website on the Samsung 2012 Slate. He clicks on the trailer and sends it to a friend on Facebook.

While ACB predict an increased use of multiple devices in the future, viewing content and conducting complementary searches for further information is still rare behaviour at the present time.

Actual: M18 (Harvey Drucker) watches films on the back room TV, using IMDb to look up further information from his Slate, while occasionally discussing films on Facebook with his friends.

When it comes to interacting with TV content using additional screens, viewers had a clear belief that there were only certain types of TV shows where apps would be appropriate.

Claimed: F34 (Julia Foster): *"At the moment, I love 'Miranda', so I'd hate to have an app like that to interfere with it. No, I just want to watch it… With 'Dancing On Ice', I want to know about the dancers and the celebrities, and I want to find out a bit more about that, and you can do that while watching it, whereas with 'Homeland' you can't take your eyes off it"*[13].

It is clearly difficult to rely on claimed behaviour, though valuable insights may be gleaned.

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a wish to have an app that delivers a human interest dimension to existing content, sparking interest, adding depth to the viewing experience

TV is showing 'CBeebies' as he leaves the room. He is then observed using the Zeebox app on his mobile phone to change the channel to Sky F1 and then uses his SmartView app to watch this Formula 1 content on his mobile

Among viewers who were observed using a complementary second screen app, there were demands for a better service.

F49 (Sheila Bailey) described how she enjoyed the BBC Olympics app and that it held her interest, but she wanted to find out more about the athletes' backgrounds.

Claimed: F49 (Sheila Bailey) *"finding out about their stories – the girl who lost her mum, even for 'Strictly Dancing' and so on ..anything about people's stories…."*

M50 (Gavin Bailey) describes an instance where he was keen to obtain more information: *"There was this film 'Aviator' and Howard Hughes and how we never knew what happened to him and it would be good to know what actually happened in the end to him".*

Both viewers expressed a wish to have an app that delivers a human interest dimension to existing content, sparking interest, adding depth to the viewing experience and initiating further conversation. A more sterile and matter-of-fact source of information may be less able to satisfy this requirement.

It is interesting to see that viewers are engaged by a mix of factual information coupled with human interest content. This will be discussed further in Section 4 (Insights into Zeebox and Shazam). It is also important to note that appetites clearly exist for both synchronous and asynchronous information.

How are they being integrated into the main screen content, and how can this be improved? Synergy across devices.

Among the viewers of Phase 6, there is claimed appetite for increased synergy across devices, both in terms of control and content. Yet, at the moment, it is still not easy enough for the majority of viewers to synchronise all their devices so that their usage can be optimised.

One exception to this finding is M32 (Adam Foster), a participant who, in recent phases of the 1-3-9 Longitudinal Media Lab, has emerged as slightly further ahead of the curve than the rest of the sample.

There were a few other viewers who explored ways of linking their mobile devices to the TV but the experience did not prove to be valuable enough to prompt them to incorporate the facility into their day-to-day behaviour; it was more occasional.

CASE STUDY

M32 synergy of devices

Actual: Apps that allow M32 (Adam Foster) to connect his devices are part of his everyday routine: The TV is showing 'CBeebies' as he leaves the room. He is then observed using the Zeebox app on his mobile phone to change the channel to Sky F1 and then uses his SmartView app to watch this Formula 1 content on his mobile – doing all this while out of the room. For Adam (M32), the need for a remote is rapidly reducing; he is able to use his voice, motions and his mobile phone to achieve what he is able to do with his TV remote.

The importance of this synergy across devices is evident in much of what M32 (Adam Foster) describes when he talks about how he uses his devices and products. Familiar with Zeebox, Shazam and AllShare linking to his mobile and TV when other products fail to deliver these same features, he is frustrated, particularly when he sees other products advertised that are unable to deliver:

Claimed: M32 (Adam Foster) believes there is insufficient synergy between the devices. *"The EE advert where Kevin Bacon is saying 'watch a film on your phone while you are out and then you get home and you pause it and you start it again on your TV' is great – but there is no synergy between iPlayer or any of the on- demand apps, on the TV, on the Sky box or your phone or the tablet. It's great that if I'm watching a programme on my phone that I go out the app and go and play, watch something else or do something else on the phone and I go back to the app, I can watch three or four different programmes and each time I go back to each programme it will be in exactly the same place. But when I go and watch the same programme, say 'Top Gear', on my phone and then I come in and have to fast forward for 35 minutes to where I was watching …it's on the same network, why can't they talk to each other, start on the TV where I have left off on the mobile….that really frustrates me."*

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