

TELEVISION – QUALITY TIME FOR DIGITAL NATIVES



THE RESEARCH QUESTIONS



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**What role does TV
play in the media
consumption of
Digital Natives?**

**And what does this
mean for TV as an
advertising medium?**

STUDY DESIGN



HAPPIISODES

30 participants documented their consumption of moving images over the course of 10 days, using our research app Hapisodes.



EXPLORATIONS

We conducted 60-minute one-on-one interviews with 18 participants to explore the documented consumption habits in greater depth.



ONLINE SURVEY

The results of the qualitative study were validated by an online survey among 1004 participants from German-speaking Switzerland.

A study by:

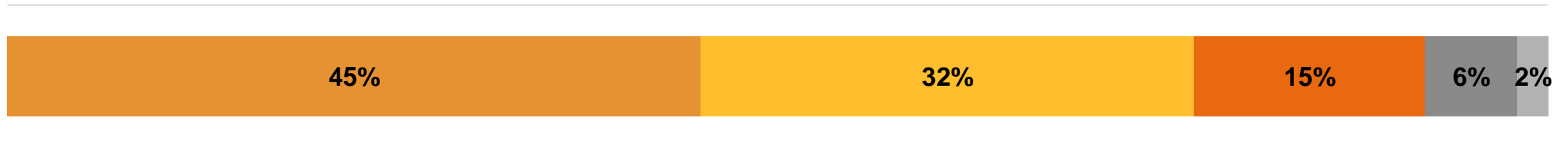


THE PEOPLE UNDERSTANDING COMPANY

for Screenforce Schweiz.

DIGITAL NATIVES LIKE TO WATCH TV

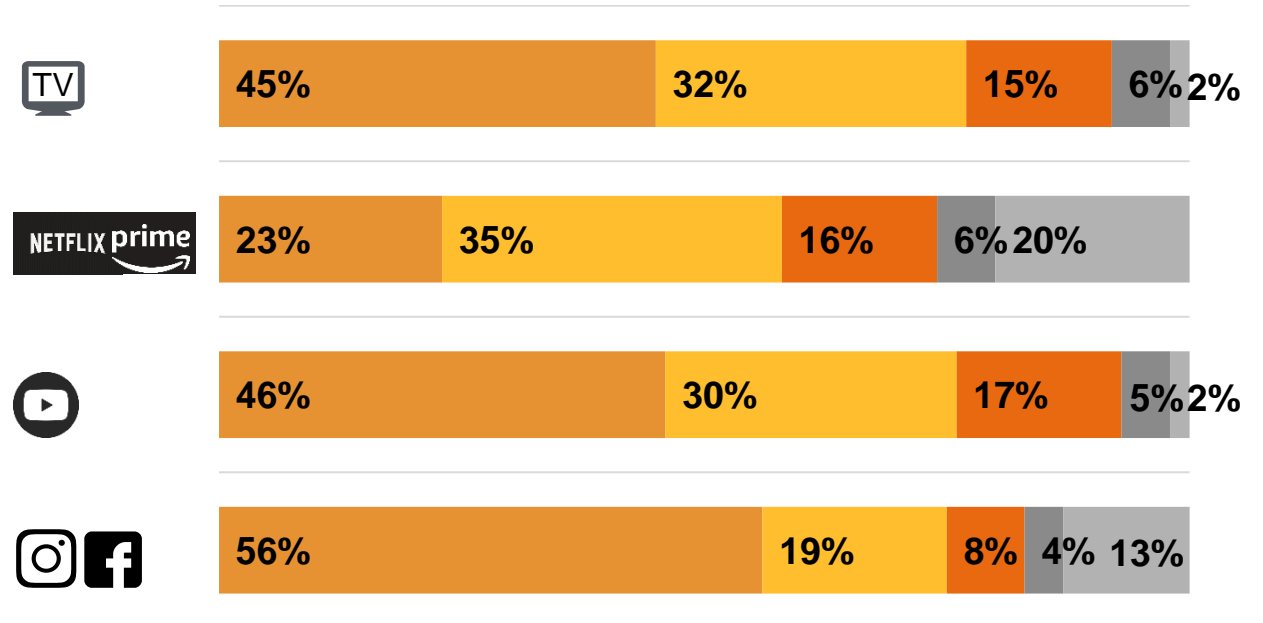
How often do you watch content produced for television on your TV, your computer/laptop or a mobile device?



■ Every day
■ Several times a week
■ Several times a month
■ Several times a year
■ Never

HYBRID, INTENSIVE MOVING IMAGE CONSUMPTION

- Highly diversified moving image consumption with a high frequency across all channels.
- The different media are able to position themselves in a differentiated way via divergent motives and consumption situations.



■ Every day ■ Several times a week
■ Several times a month ■ Several times a year
■ Never

MEDIA PROFILES BY COMPARISON

Social media

The Time Filler

YouTube

The Allrounder

TV

The Social
Medium

HABITUALISATION VS RITUALISATION

PASSIVE VS ACTIVE

INDIVIDUAL VS SOCIAL

STRESS VS RELAXATION

TV AS THE MOST VIEWED MEDIUM IN A SOCIAL CONTEXT

Individual consumption: several times a week Social consumption: several times a week



SOCIAL MEDIA – THE NEW WALLPAPER MUSIC



SOCIAL MEDIA: CONSUMPTION HABITS



Filler consumption



Habituation



**Passive individual
consumption**

SOCIAL MEDIA STRESS SYNDROME



SOCIAL MEDIA STRESS SYNDROME

Frequent questioning of one's own social-media consumption. Many consumers perceive the content as meaningless or uninteresting.



Simultaneous feeling of a loss of control. Automated consumption leads to careless, sometimes unintentional overconsumption.



Increasing need to reduce one's own consumption of social media and 'make better use of one's time'.

REMINDS ONE OF...



YOUTUBE – THE ALL-ROUNDER



YOUTUBE: CONSUMPTION HABITS

It's...

- Filler function
- Habitualisation
- Passive

... and also

- Targeted, focussed
- Ritualisation
- Active

TV: ON OUR OWN, WE WATCH IT EVERYWHERE AND OFTEN



TV: HYBRID INDIVIDUAL CONSUMPTION

Hybrid consumption on all available devices and channels.

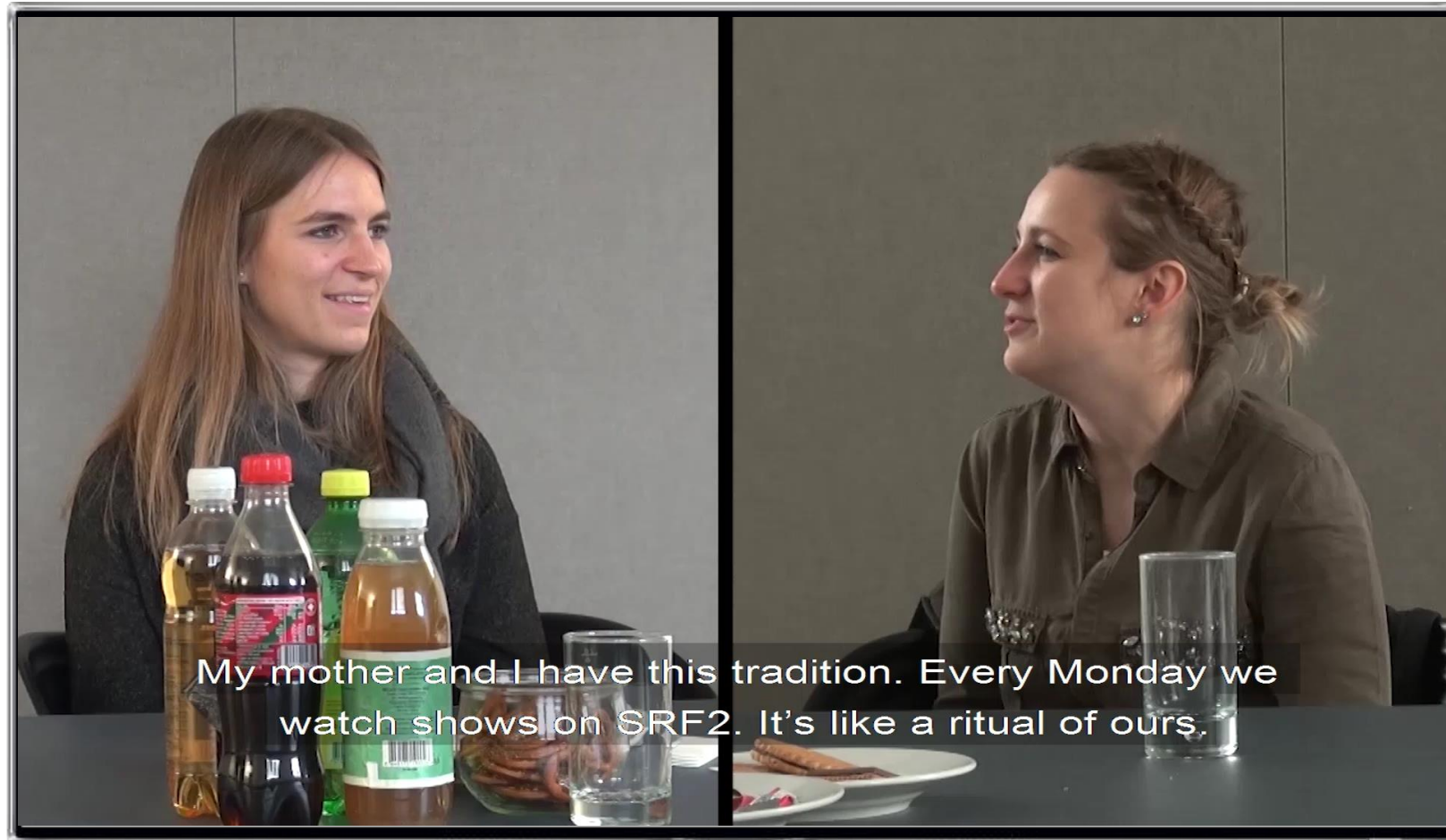


Active consumption: triggered primarily by content, unlike social media.



Compared to social media, individual TV consumption leads to **interpersonal exchange** more frequently.

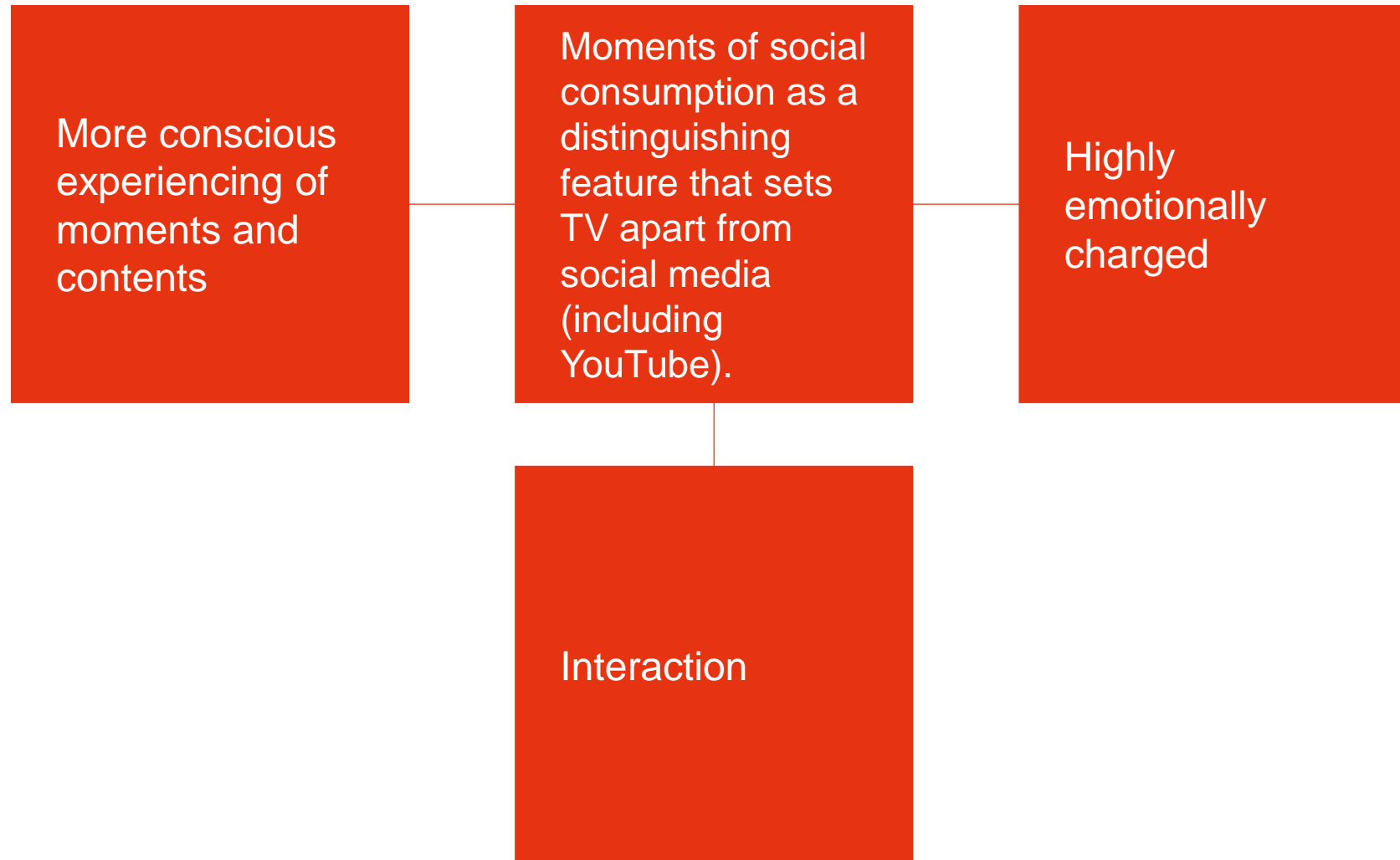
SOCIAL MEDIA. SAY WHO?



THE SIGNIFICANCE OF TOGETHERNESS



'SOCIAL' MEANS: MORE CONSCIOUS, MORE EMOTIONAL

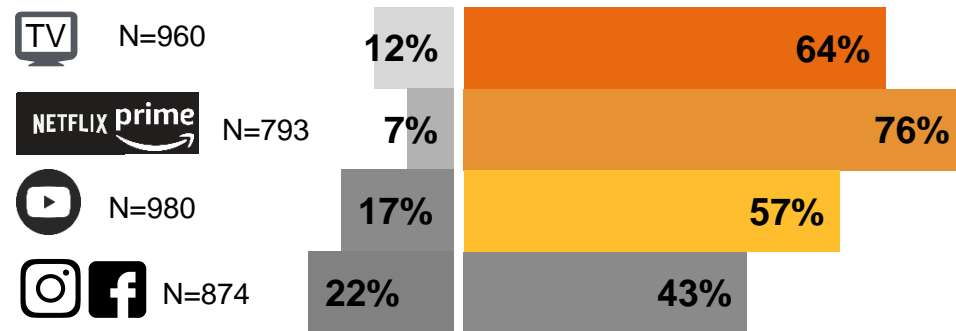


THE 'QUALITY TIME' FORMULA



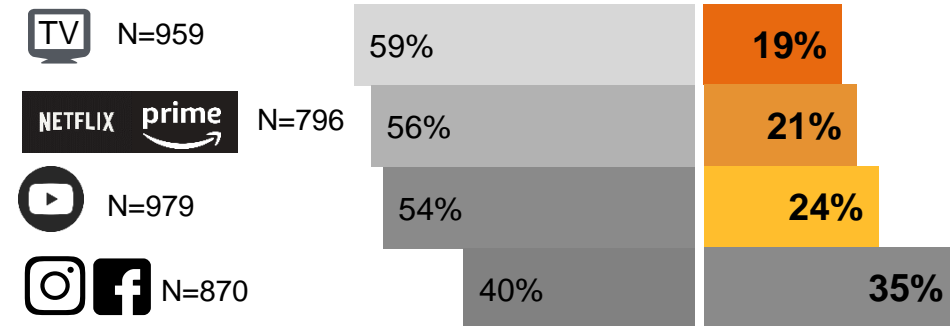
TV RELAXES

To me, watching TV/Netflix/YouTube/social media videos is a relaxing experience.



- The consumption of TV and Netflix (and Amazon Prime) is perceived as considerably more relaxing than YouTube and social media.

My consumption of videos on TV/Netflix/Amazon Prime/YouTube can be a stressful experience.



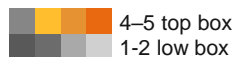
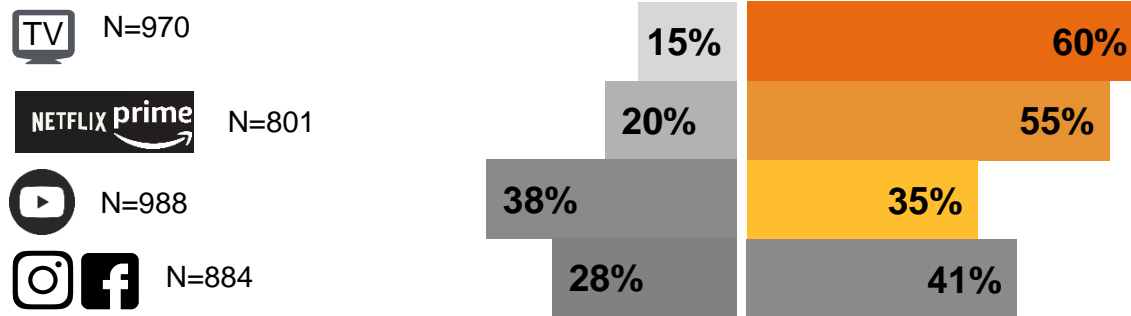
- More than a third of respondents find the consumption of videos on social media stressful.



On a scale from --1 to 5++

MOST TALKED-ABOUT TV CONTENT

I frequently talk to my friends, colleagues or family members about shows/videos I have watched on TV, Netflix/Amazon Prime, YouTube or social media (Facebook, Instagram).



On a scale from --1 to 5++

WHAT DOES THIS MEAN FOR ADVERTISING?

The emotionally engaging setting of TV consumption as an ideal breeding ground for advertising reception:

**Conscious
consumption**

WHAT DOES THIS MEAN FOR ADVERTISING?

The emotionally engaging setting of TV consumption as an ideal breeding ground for advertising reception:

Conscious
consumption

Positive
mood

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Relaxation

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Interaction

WHAT DOES THIS MEAN FOR ADVERTISING?

The emotionally engaging setting of TV consumption as an ideal breeding ground for advertising reception:

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consumption

Positive
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Relaxation

Interaction

Intensive
experience

ACCEPTANCE AND PERCEPTION OF TV ADVERTISING



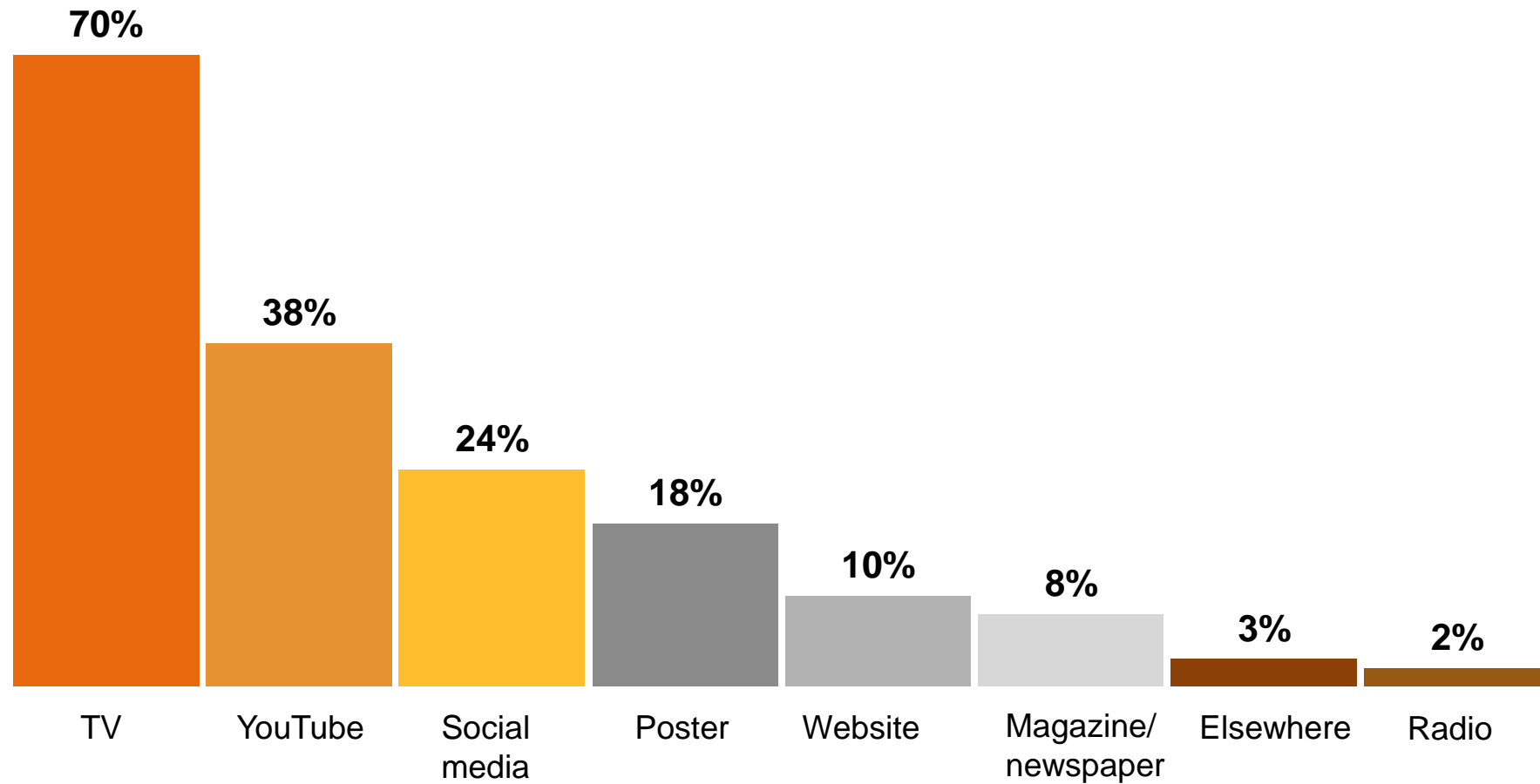
WE ASKED 1004 DIGITAL NATIVES...

Think about an advertisement that you have seen or heard and that you really liked. What brand was it?



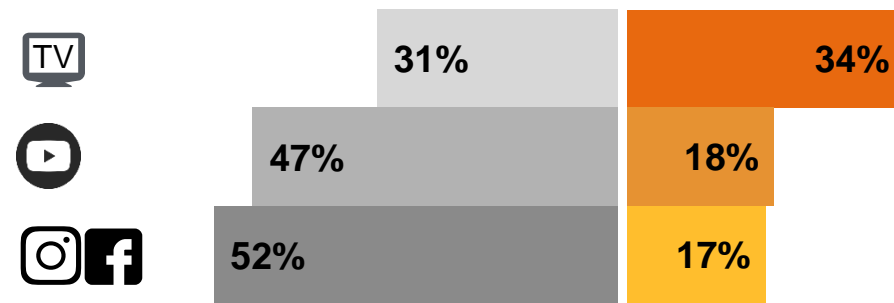
Where did you notice the advertisement?
(multiple answers accepted)

... TV COMES FIRST

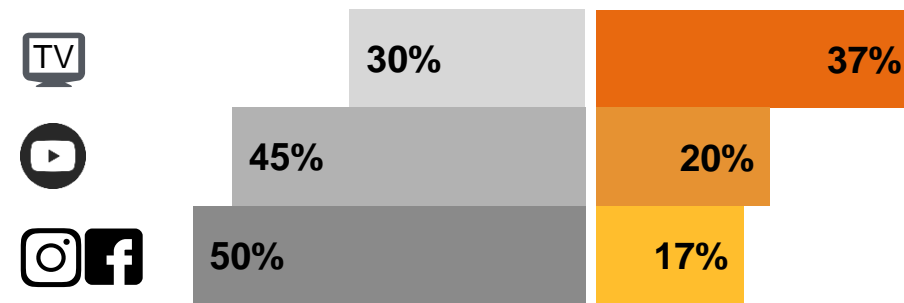


... AND FINALLY:

I find advertisements on TV/YouTube/social media trustworthy.



I perceive companies that advertise on TV/YouTube/social media as respectable and trustworthy.



4-5 top box
1-2 low box

On a scale from --1 to 5++

CONCLUSION

- **Television is a relevant part of Digital Natives' moving image media mix.**
- **It sets itself apart via its emotionally charged consumption context, which happens in an environment of cosiness and relaxation and which frequently leads to interpersonal interaction about the viewed content among family and friends.**
- **All of this makes the medium TV an ideal breeding ground for advertising reception. Especially suited for storytelling-based brand image ads.**