



THE BATTLE FOR EYE SPACE IN A TV-EVERYWHERE WORLD

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DIGITAL WORLD

the way people engage with media **HAS TRANSFORMED**

more than half of the viewers that visit their favorite sites
each month visit them **ON A WEEKLY BASIS**

companies need **STRONGER BONDS WITH CONSUMERS**

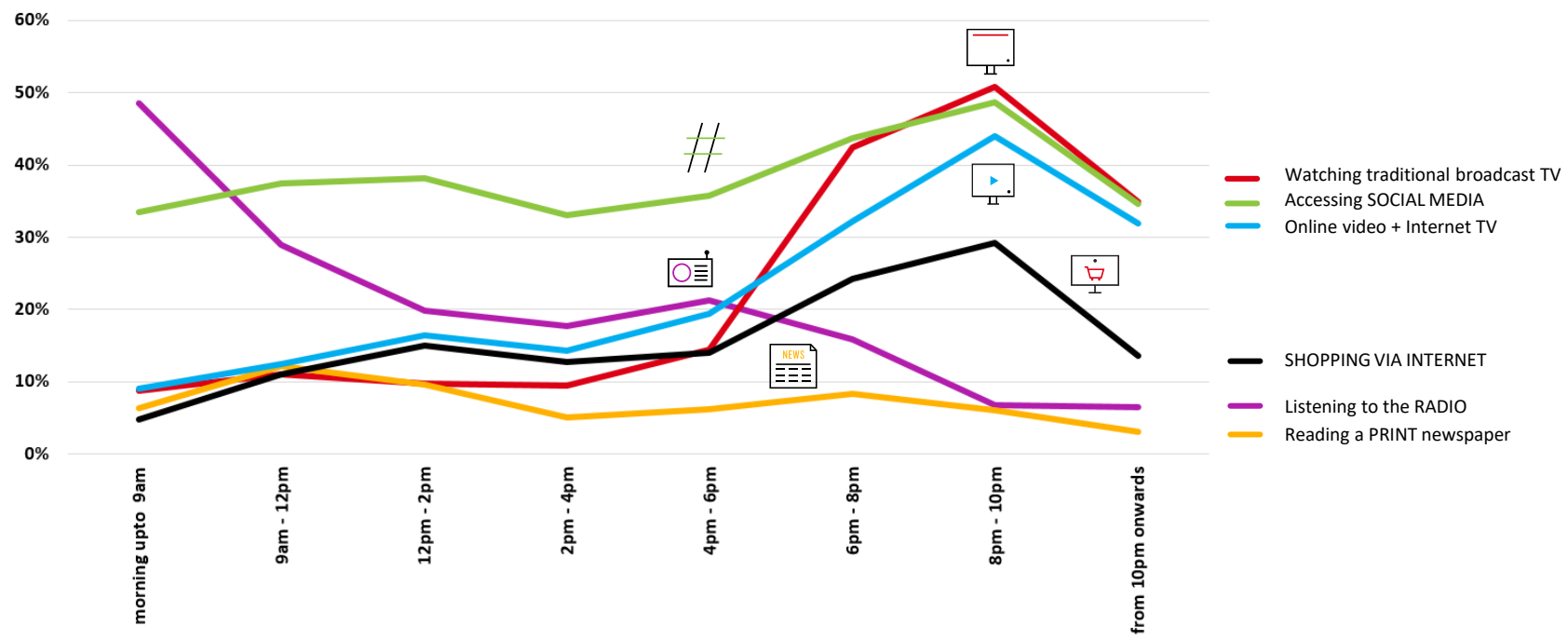
Let's learn more about the audiences
that consume media content day-to-day



WHAT OUR DAYS LOOK LIKE

ACTIVITY ACROSS DAY PARTS - IRELAND

Video in the evenings

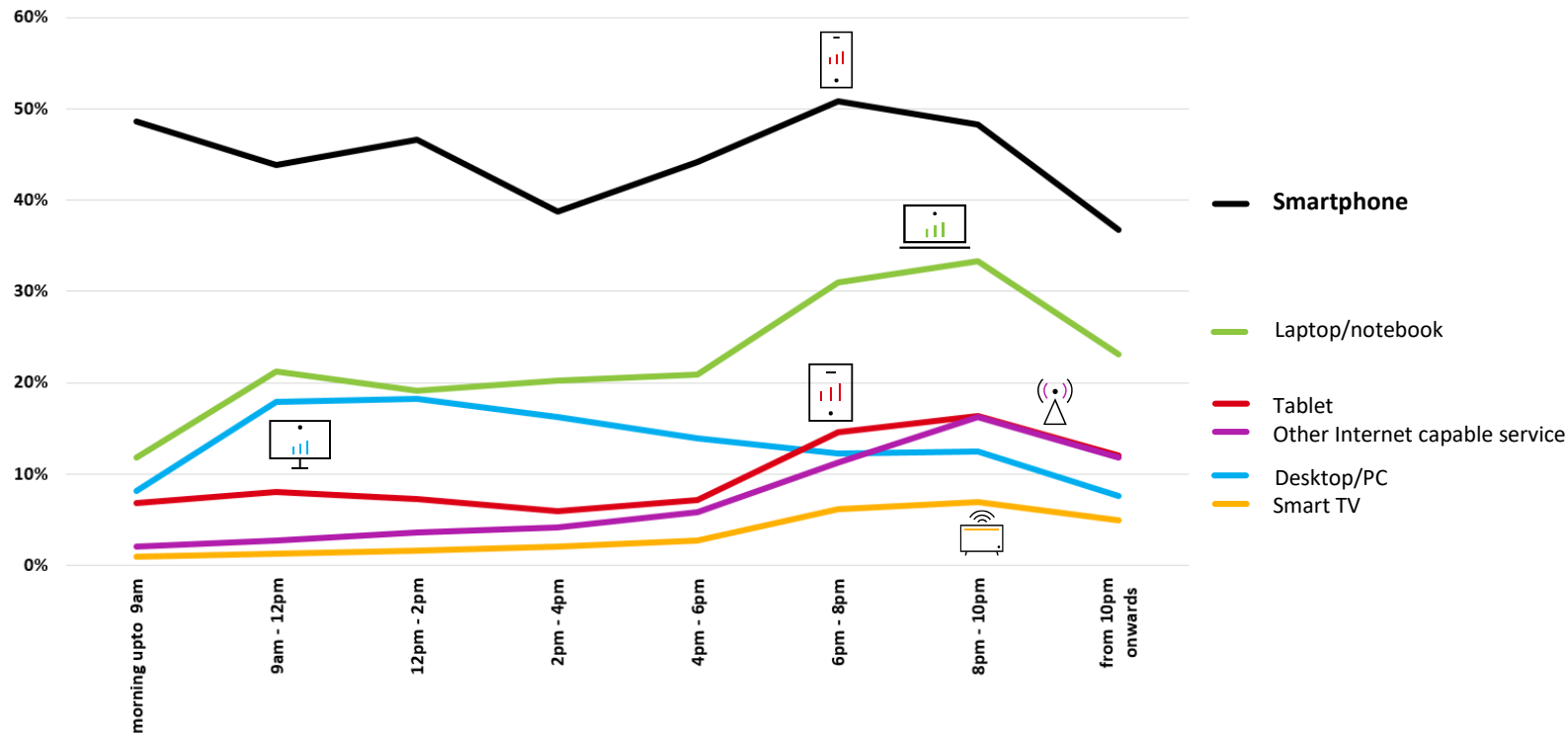


Note: At what times in the day do you perform the following activities?
 Source: Digital Consumer survey



DEVICES ACROSS DAY PARTS – IRELAND

Smartphone during whole day



Note: At what times in the day do you use following devices?
 Source: Digital Consumer survey 2017



NOWADAYS WE USE ELECTRONIC DEVICES TO...



65%



63%



63%



61%

IN FUTURE WE PLAN



52%



52%



48%

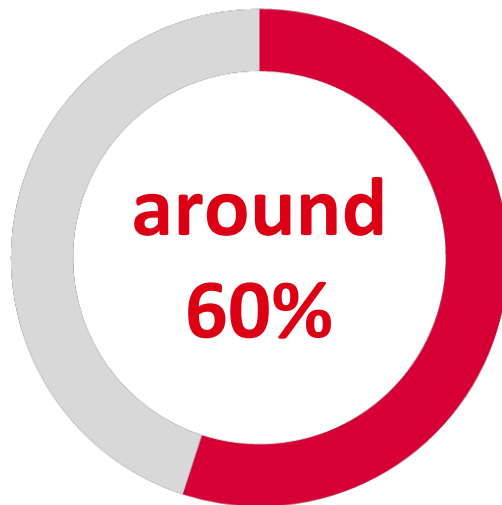


46%



CONSUMPTION OF VIDEO CONTENT

WORLDWIDE, WHAT PERCENTAGE BELIEVE WATCHING VIDEO CONTENT IS AN IMPORTANT PART OF LIFE?



**THE WAY AUDIENCES WATCH
VIDEO, HOWEVER, IS SHIFTING...**

AT HOME, TV REMAINS THE **PRIMARY DEVICE OF CHOICE** FOR **VIDEO CONSUMPTION.**

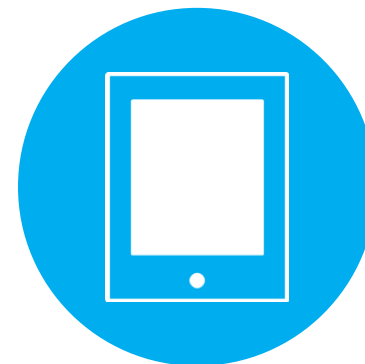


BUT WHICH DEVICE TAKES A CLOSE SECOND?

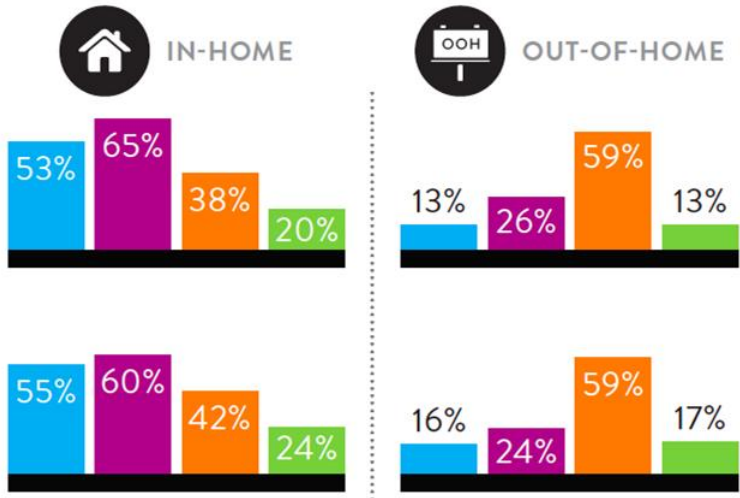
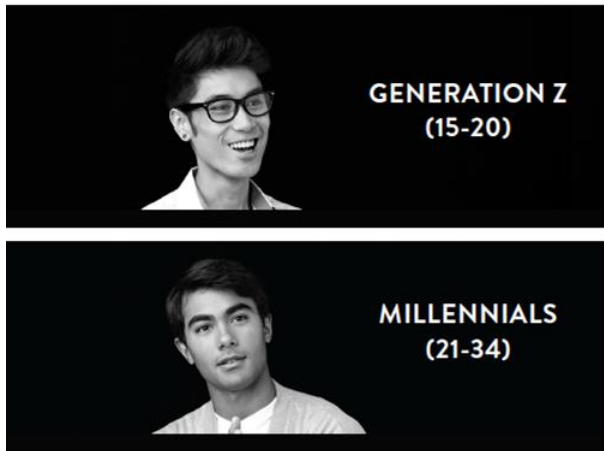


GLOBALLY, 56% SAY THEY WATCH VIDEO PROGRAMMING ON COMPUTERS AT HOME
(ONLY 7 PERCENTAGE POINTS BEHIND TV (63%).

34% SAY THEY USE A MOBILE PHONE
AND 22% MENTION A TABLET.

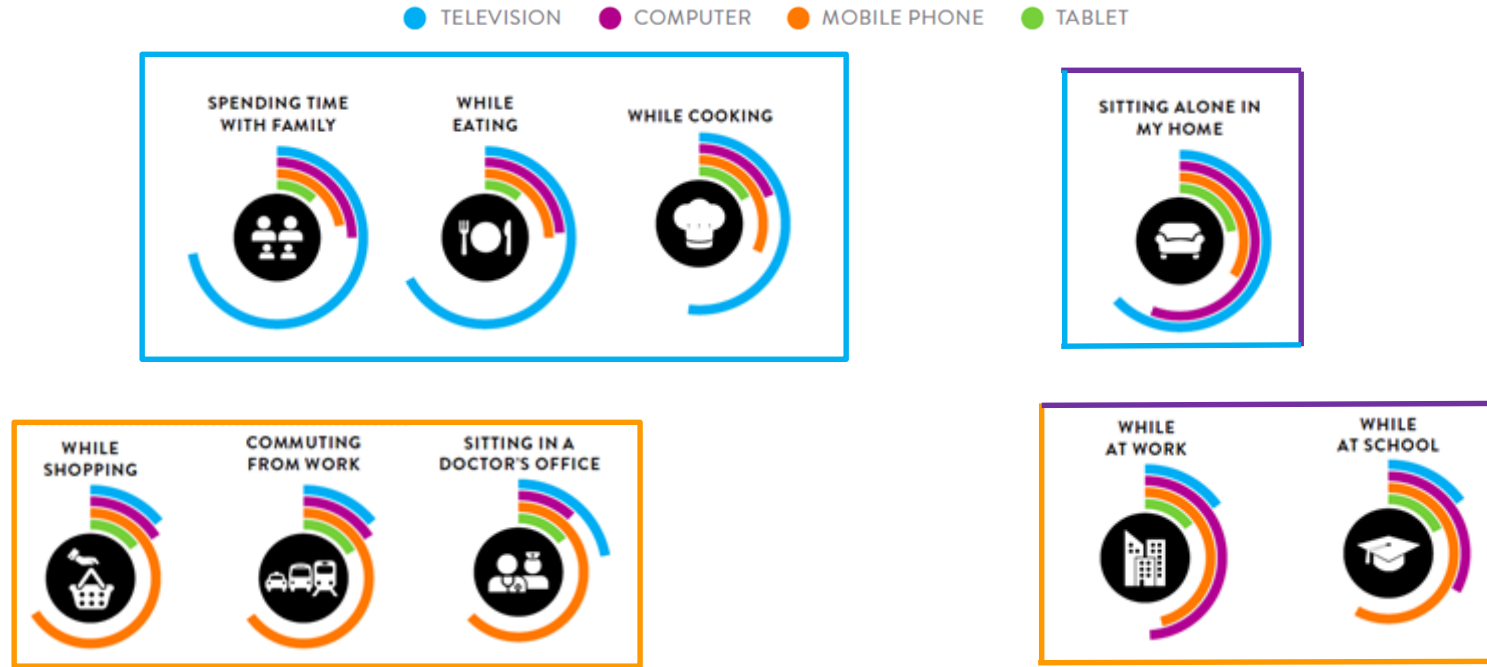


YOUNGEST CONSUMERS USE MOBILE FOR VIDEO CONSUMPTION THE MOST, REGARDLESS OF LOCATION



Note: AVERAGE PERCENTAGE WHO SAY THEY USE DEVICE TO WATCH VIDEO PROGRAMMING IN SELECTED LOCATION
 Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World

PREFERRED SCREEN FOR VIDEO DEPENDS ON ACTIVITY AND LOCATION

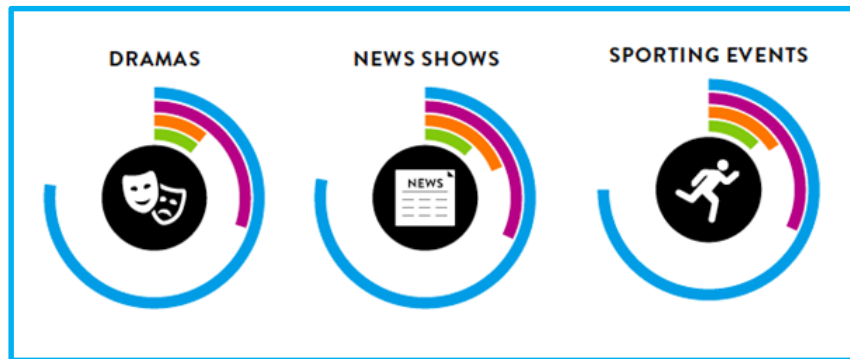
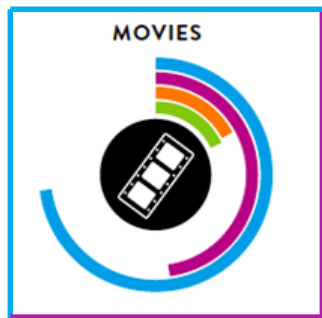


Note: SELF-REPORTED DEVICE PREFERENCES FOR WATCHING VIDEO BY ACTIVITY

Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World

DEVICE CHOICE ALSO DEPENDS ON THE GENRE

● TELEVISION ● COMPUTER ● MOBILE PHONE ● TABLET



Note: SELF-REPORTED DEVICE PREFERENCES FOR WATCHING VIDEO BY ACTIVITY

Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World

TRADITIONAL TV STILL SUFFICIENT FOR MANY

IRELAND

I have no need to,
traditional TV is sufficient

43%

I don't want to watch TV
via a computer, tablet or mobile phone

31%

POLAND

38%

24%

ITALY

32%

42%

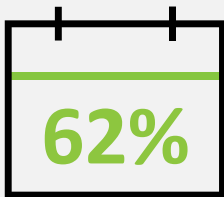
Note: Reasons for not watching TV programs or movies from internet sources / video on demand services
Source: Digital Consumer Survey 2017

MULTITASKING AND ENGAGEMENT

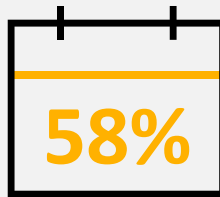
WATCHING TV AND USING INTERNET AT ONCE

DAILY OR NEARLY DAILY...

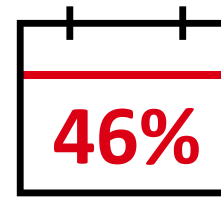
IRELAND



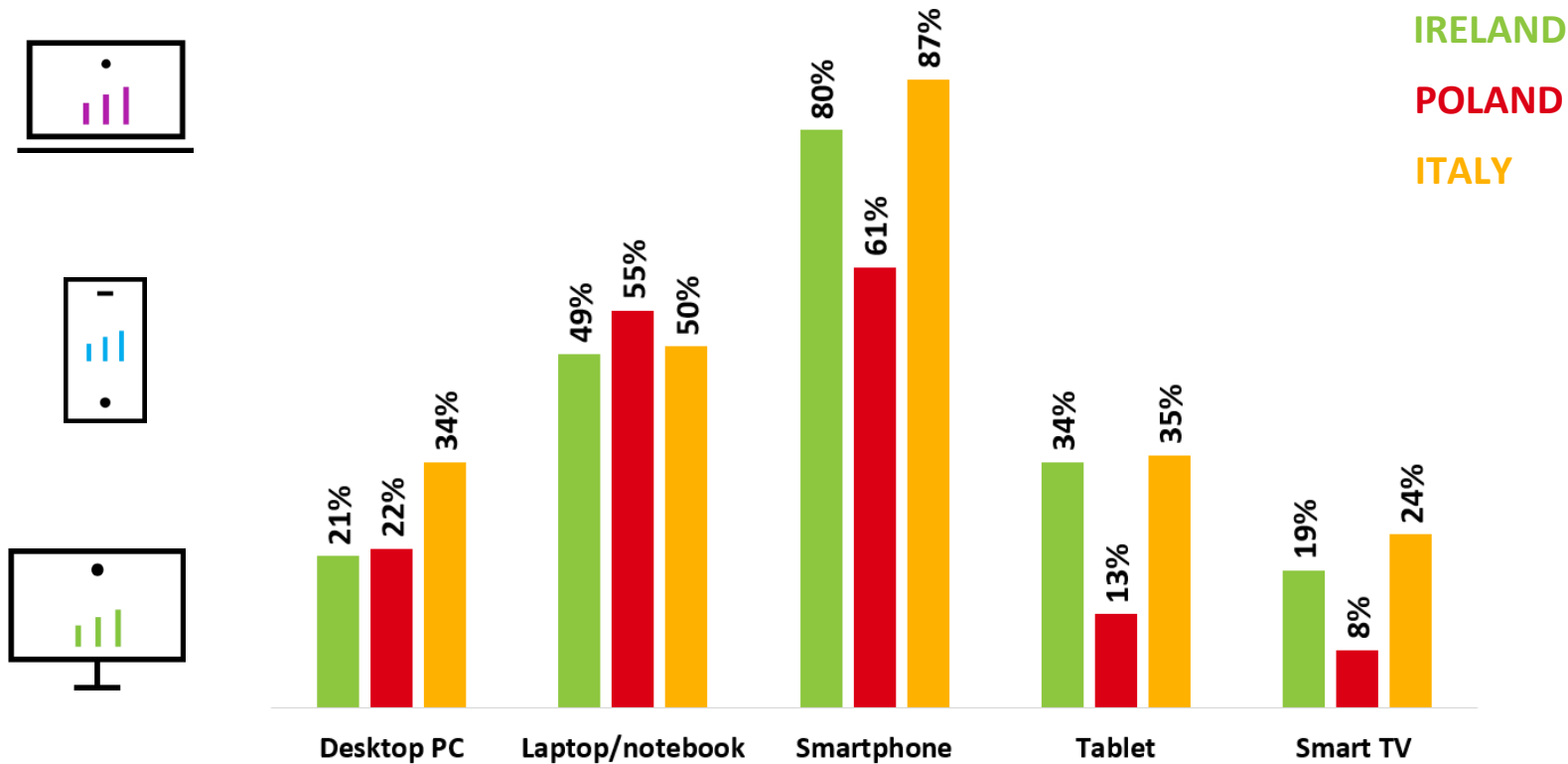
ITALY



POLAND



SECOND SCREEN WHILE WATCHING TV



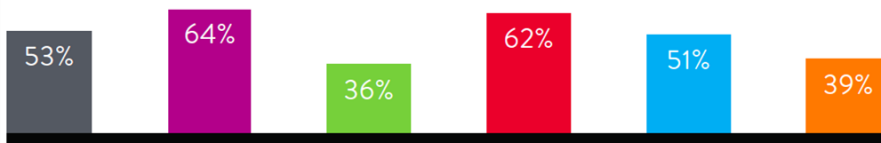
Note: device regularly used to access the internet when watching TV and using the internet at the same time

Source: Digital Consumer Survey 2017

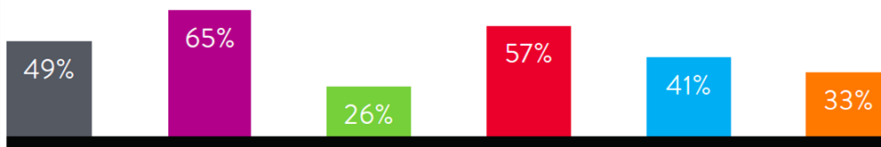
SECOND AND THIRD SCREENS ARE BECOMING AN EXTENSION OF THE VIEWING EXPERIENCE



LIKE TO KEEP UP WITH SHOWS SO I CAN JOIN THE CONVERSATION ON SOCIAL MEDIA



WATCH LIVE VIDEO PROGRAMMING CONTENT MORE IF IT HAS A SOCIAL MEDIA TIE IN



Note: PERCENTAGE WHO STRONGLY OR SOMEWHAT AGREE

Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World



SOCIAL
MEDIA



VIDEO
PROGRAMMING



ENGAGED
AUDIENCE

Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World

ADVERTISING AND SHOPPING IN A DIGITAL WORLD

ADVERTISING IN A DIGITAL WORLD

NOT TOO LONG AGO **CREATIVE/ADS** WAS THE MOST IMPORTANT PART OF THE MIX

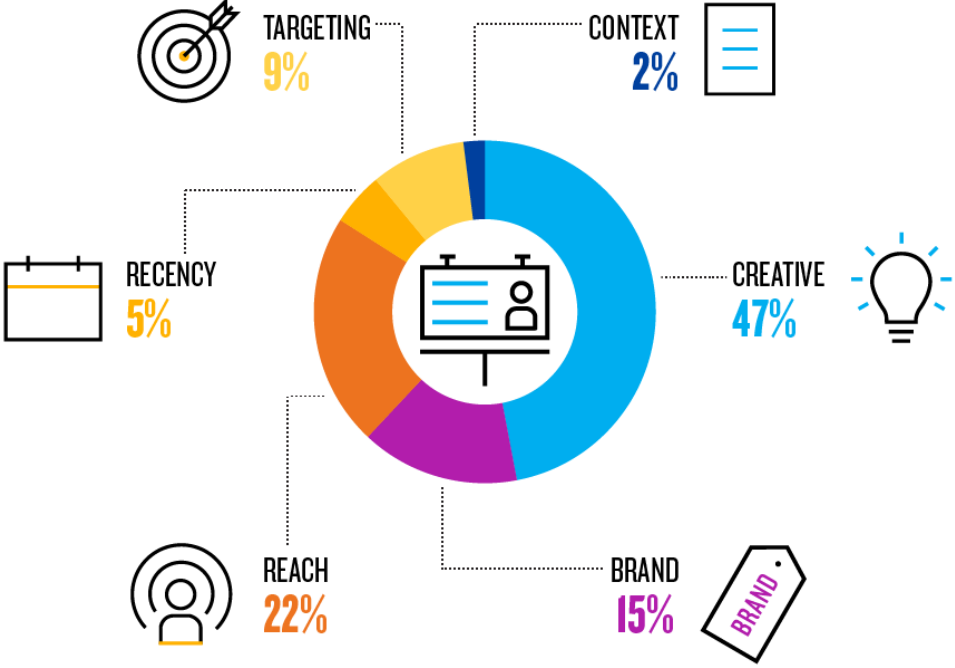
→ the balance has shifted

FIVE KEY ELEMENTS:



but also the impact of “**brand factors**” related to the characteristics, such as **PRICE** and **PENETRATION**

PERCENT SALES CONTRIBUTION BY ADVERTISING ELEMENT



Nearly 500 campaigns across all media platforms
Source: Nielsen Catalina Solutions © 2017; Period 2016-Q1 2017

CONCLUSION

WHO IS YOUR ONLINE AUDIENCE AND HOW TO REACH THEM?



YOUNG

15-20 and 21-29 y.o.
Internet users watch video online more

But **do not forget older users**



MULTISCREEN

Smartphone addicted but still preferring to watch video online on laptop

Sitting in front of many screens at the same time



FREQUENT

Watching video online every day or every other day

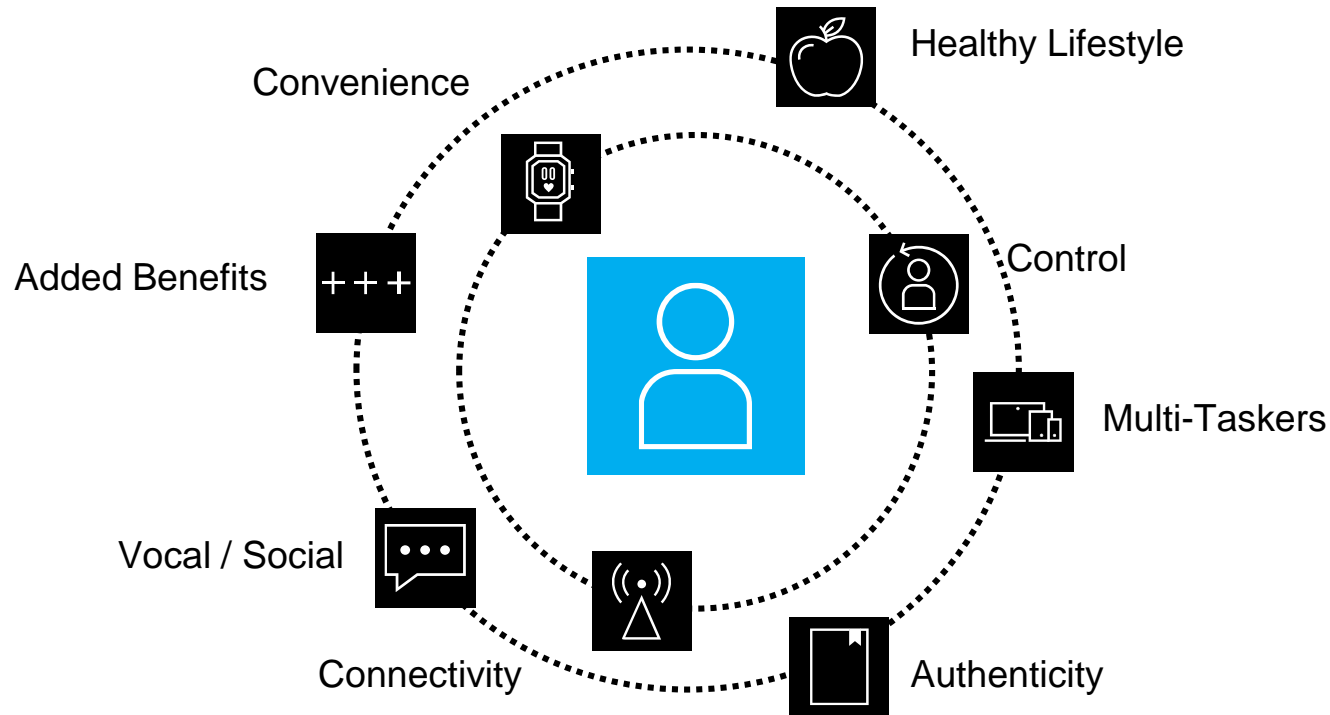
Evenings are the peak as well as for traditional TV



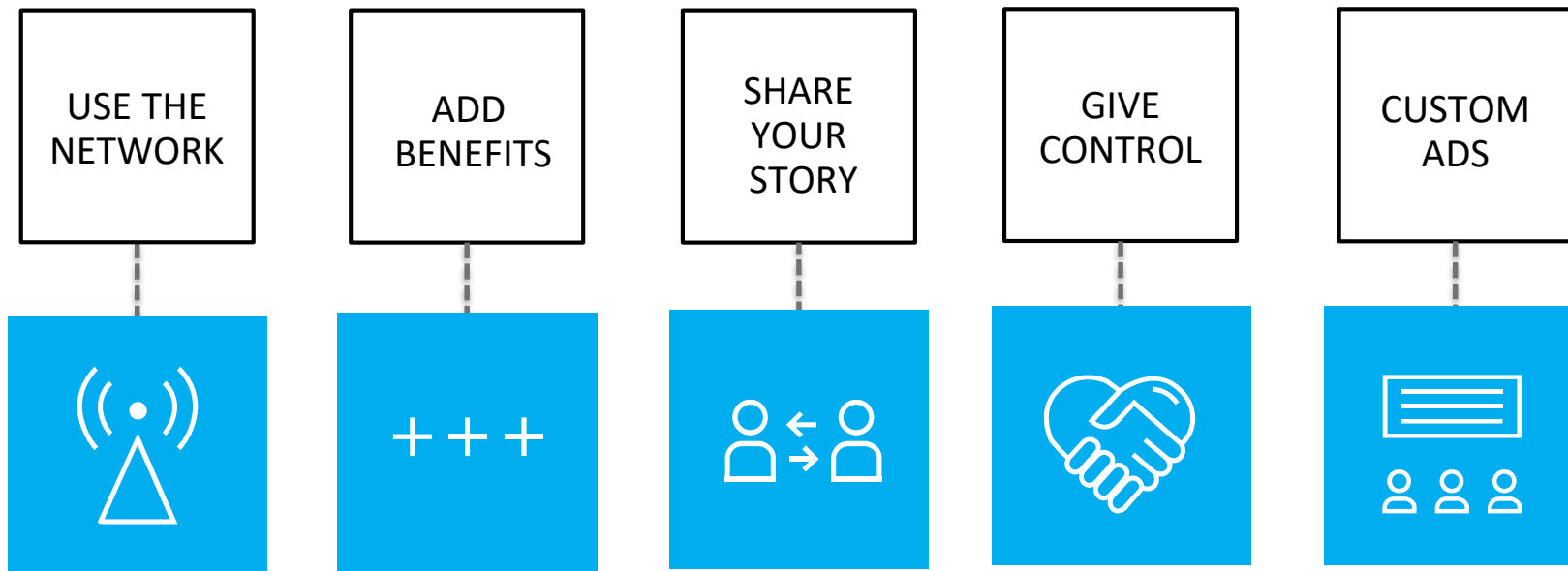
AT HOME

Wast majority is watching at home

ALIGN WITH THE values & characteristics of THE **WE, MORE AND NOW** GENERATION



MINE THE MILLENNIAL OPPORTUNITY



SHOPPING AND ADVERTISING IN THE DIGITAL AGE

CREATIVE IS STILL KING

CONTEXT AND CREATIVE — INSEPARABLY CONNECTED

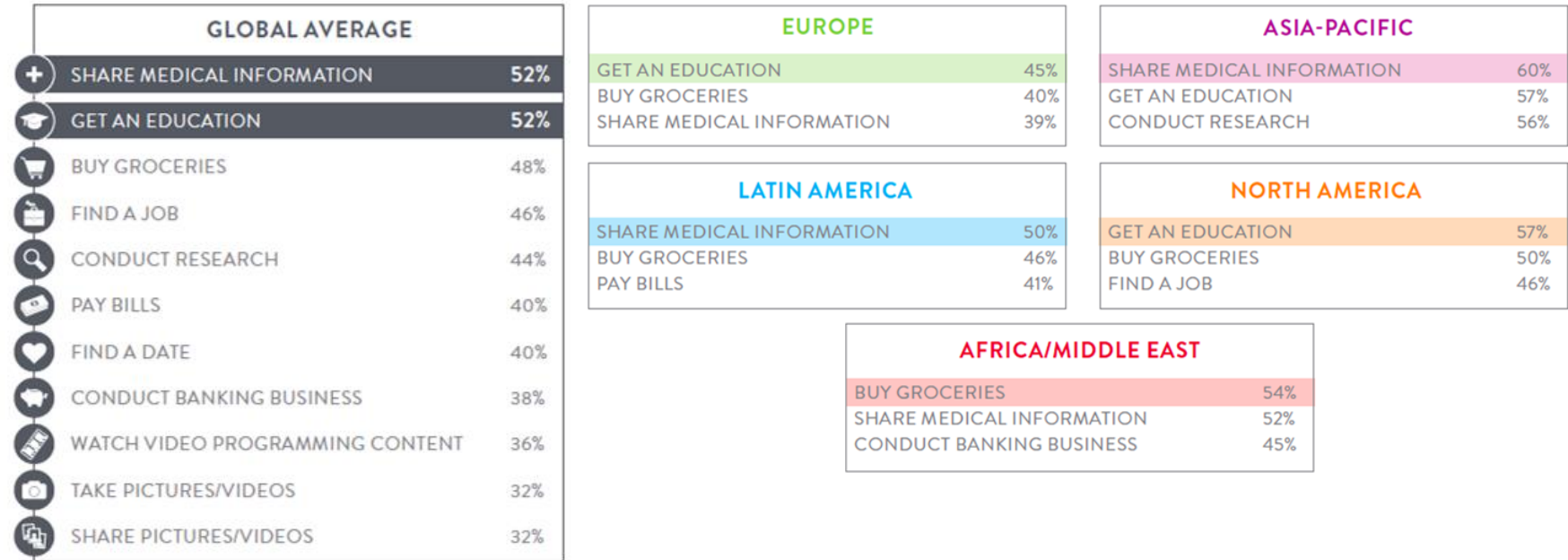
CAMPAIGN TARGETING / MULTI-DIMENSIONS

REACH AND RECENCY MATTER

RECOMMENDATIONS, REVIEWS

INTEGRATION OF RETAIL INFRASTRUCTURE WITH THE TECHNOLOGIES IN
CONSUMER HANDS

TOP DIGITAL OPPORTUNITIES BY REGION



Note: PERCENTAGE WHO ARE DEFINITELY/SOMEWHAT WILLING TO USE AN ELECTRONIC DEVICE FOR SELECTED ACTIVITIES

Source: Nielsen Global Digital Landscape Survey, The Battle for Eye Space in a TV-Everywhere World



nielsen

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