

**Åbo Akademi  
University  
School of  
Business  
& Economics**



# Media consumption trends

WIVE WP2 QUARTERLY REPORT

PERIOD JULY – SEPTEMBER 2017

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# Introduction to Q3 2017

## Multitasking, simultaneous use of media devices and streaming services

Reports and research published during the third quarter of 2017 continues to highlight the multitasking nature of media consumers regardless of age, and also the use of second screens while viewing linear TV. Attention is slowly turning from aspects related to brain structure, effects and behavior to engagement and attention. Analysis on the consequences of multitasking show that media consumers' multitasking may result in cognitive overload, which makes it hard to reach consumers through, e.g., advertising messages. There is still much to research in terms of effects of one medium while simultaneously using another.

Our western neighbors have published a comprehensive report related to media development, which confirms the popularity of

Youtube among 9-19 year-olds. Concurrently, the service providers (Youtube, Snapchat etc.), which are popular among youngsters, are extending their business models by launching news video streaming services. Services such as YoutubeTV and Snapchat Discover have potential to further change future media consumption patterns as news are increasingly consumed in video format.

During Q3 2017, Deloitte has expressed their perception of today's mobile consumer. Also, Ericsson discusses their view of the future through the concept of merged reality, which combines virtual and augmented reality.

Turku, 10<sup>th</sup> October 2017

# Media multitasking and second screen viewing

**Second screen viewing** involves the use of a computing device to provide an enhanced viewing experience for content on another device, such as the television. But are the second screens really enhancing the TV experience? Or is this kind of media multitasking actually distracting us?

## # Media multitasking: How visual cues affect switching behavior

Brasel, S.A. & Gips, J. in *Computers in Human Behavior* 77 (2017) 258-265

An observation-based study showed that lower-level visual cues (such as motion) were more effective at creating switches towards content, while higher-level perceptual cues (such as faces) were more effective at discouraging switches away. Another study showed that among participants using a computer and television simultaneously, media switching is rapid and constant. TV shows and commercial onsets favored switches from TV towards computer.

Single screen multitasking is also increasing as larger computer monitors enable consumers to access simultaneous media streams, tablets add split-screen multitasking, and large smartphones offer pop-out media players that overlay video content above other applications.

## # eMarketer report: More people are multitasking while watching TV

Source (16 November 2016): <https://www.emarketer.com/Article/More-People-Multitasking-While-Watching-TV/1014726?ECID=SOCX1473>

74.1 % of adults surf the web while they watch TV.

The use of second screen is not limited to smartphones, but relates to laptop and tablet use as well. People are browsing the web for content

related to what they are watching (31 %) and also, to have social conversations related to what they are watching (19 %). 20 % of viewers watch two or more programs at the same time (compared to 15 % in 2014). Also, US internet users are most likely to multitask while consuming live/linear TV (53 %), timeshifted TV (28 %) and streamed content (OTT) (19 %).

## # iab: The changing TV experience 2017

Source (May 2017): <https://www.iab.com/wp-content/uploads/2017/05/The-Changing-TV-Experience-2017.pdf>

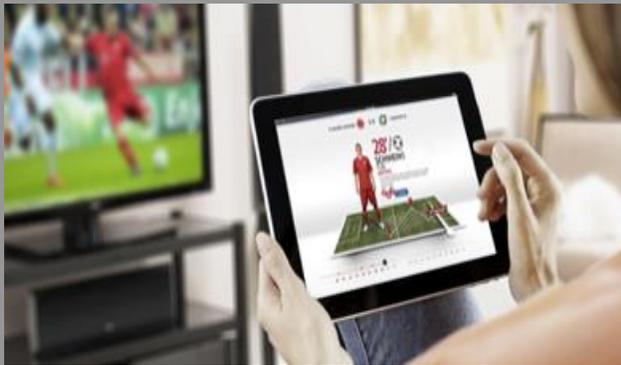
While watching any video content on a TV screen the top multitasking activities on smartphones are checking social media (unrelated to the video, 72 %), e-mail (unrelated to the video, 67 %), browsing the internet (unrelated to the video, 66 %), catching up on news (55 %), looking up or posting information about something else (53 %), and playing games (50 %). The tablet features the same activities, but in addition, shopping (54 %) is mentioned. In terms of computers, browsing the Internet (77 %) and e-mail (73 %)(unrelated to the video) as well as shopping (64 %) and checking bills/finances (60 %) are mentioned.

## # Can you really multitask?

Youtube video available at URL:

<https://www.youtube.com/watch?v=hEPCTFuuqgY>

# Second screen viewing in Finland and the Nordic countries



**# The share of second screen use among TV watchers in the Nordic countries has increased in the past few years, reaching 66 % by the end of 2016.**

**# Smartphones are the most used device for second screen viewing while watching TV.**

**# In Finland, the devices most used for accessing online content while watching TV are:**

Smartphones 59 %

Computer 33 %

Tablet 29 %

<https://www.statista.com/statistics/571620/usage-of-a-second-screen-while-watching-television-in-the-nordic-countries-by-device/>

<https://www.statista.com/statistics/369811/second-screen-device-usage-finland/>

**# Around 80% of the population in the Nordic countries are watching traditional TV on a weekly basis, however, more than 2 out of 3 use other devices while watching TV.**

**# In Finland 86 % are watching traditional TV on a weekly basis.**

**# In Finland 56 % use other devices while watching TV. This number is slightly lower than in the other Nordic countries. While the use of second screens while watching TV seems to have stabilized in Finland, it still increases in, for example, Sweden.**

**# 36 % of Finns who use second screens while watching TV say they do this often. 21 % say they do it very often.**

[https://www.audienceproject.com/wp-content/uploads/audienceproject\\_study\\_traditional\\_tv\\_streaming.pdf](https://www.audienceproject.com/wp-content/uploads/audienceproject_study_traditional_tv_streaming.pdf)

# Media diary study at Åbo Akademi

## Second screen viewing among diginatives

Diaries collected in January 2017 (20-26.1)  
N = 123, age group 19-26

These preliminary results are part of a longitudinal media diary study conducted between 2013 and 2017 aiming at exploring youngsters' media use patterns, trends, media multitasking behavior etc.

**“At home in the evening, there is always some kind of media present” (Adam, 20).**

The majority of the diginatives in this media diary study are so-called heavy media multitaskers. They use media frequently throughout the entire day, often at the same time as they are studying, while travelling to and from places, and while exercising and hanging out with friends.

The majority of their media multitasking in the morning and during the day includes doing several things at the same time on their laptops or frequently checking social media updates on their smartphones while trying to for example read or write.

Media multitasking involving two (or more) screens is most often done at home in the evening. As many of these youngsters do not own a TV, their attention is usually split between the computer screen and the smartphone or tablet. Some identified trends among these diginatives concerning second screen use are presented below.

### **Trend #1 Laptop + second screen**

Smartphones and tablets are very often used while working, playing or watching video content on the laptop. Sometimes the content on the secondary screen is related to the primary computer screen, but most often it is not related at all and serve as entertainment while taking short breaks from the main activity.

“I watch Netflix and Viasat on my laptop to stay up to date with my favorite TV-series as I don't own a TV. I regularly take short breaks from staring at the computer screen to check social media updates.” (Ben, 20)

“Whenever I work with study assignments I use several devices at the same time. I always listen to background music. Now I have also installed WhatsApp on my laptop so that it is easier to chat with friends while working. Although, this is not always really that effective!” (Amanda, 20)

### **Trend #2 TV + second screen**

The number one online content that youngsters access while watching TV is social media. They very seldom access any kind of content related to the TV program, except for when watching sports or some special events.

“When I watched Trump's inauguration on TV, I used more media than usual because I also actively checked news and social media on my phone at the same time.” (Anna, 20)

“When I watch TV I often use my phone or my iPad at the same time, especially if the program is not that interesting or if the TV is on primarily as “background noise”. During commercial breaks I grab for my phone 99 % of the times. This is really quite sick when you start thinking about it.” (Lisa, 26)

### **Trend #3 TV becomes second screen**

For those who own a TV, it is often on in the background while they are really doing something else. The TV content is seldom related to the primary screen.

“The TV was on in the background while I was playing cards and checking social media on my phone. I kept an eye on it in case there would be something interesting on.” (David, 20)

“I often have the TV on in the background at home in the evening while I work on my laptop. Sometimes it's nice to take a break from working to check what is on TV.” (Emma, 19)





# Industry reports

The Swedish Press and Broadcasting Authority

## Media Development Report (July 2017)

Key findings and conclusions

# Traditional TV reaches less individuals (71 % in 2010 -> 64 % in 2016). Less people have access to a traditional TV device (95% in 2012 -> 88% in 2016). Young people are reducing watching linear TV, while the oldest respondents are increasing time spent watching linear TV.

# 11% consumes mobile video via their smartphone, 8 % via their tablet device. 15 % use their computer and 65 % use traditional TV devices.

# 86,9 % of 9-19 year-olds consume Youtube on a daily basis. They consume Youtube 69 minutes per day.

# Youtube is consumed 20 minutes per day (total Swedish population), followed by Netflix, which is consumed 17 minutes per day.

# 94 % of 9-19 year-olds use social media on a daily basis.

# Households are willing to pay for media content; the expenditure is increasing. The majority of household expenditure relate to mobile telephony and internet connections. Also, paid online services include digital newspapers, e-books and streaming subscriptions.

Source:

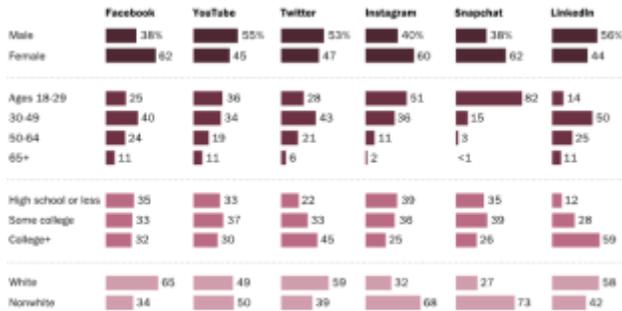
<https://www.mpri.se/Documents/Publikationer/Medieutveckling/Mediekonsumtion/Mediekonsumtion-2017.pdf> (in Swedish)

# Industry reports

## An overview of recent findings on media consumption

### Social media news user profiles

% of each social media site's news users who are ...



Note: Tumblr, Reddit, and WhatsApp not shown. Nonwhite includes all racial and ethnic groups, except non-Hispanic white.  
Source: Survey conducted Aug. 8-21, 2017.  
"News Use Across Social Media Platforms 2017"

PEW RESEARCH CENTER



### Pew Research Center: News use across social media platforms 2017

Date: 7 September 2017

#### Main findings & contributions

# Twitter, YouTube and Snapchat have grown in share of users who access news on these sites. For instance, Twitter has announced launches of news streaming partnerships (e.g., announcement 1 May 2017 on building a 24/t streaming video service with Bloomberg).

# YouTube has launched and expanded YouTubeTV (debut in April 2017), offering nearly 50 networks through its channel. The service is targeted at younger consumers as half of YouTubeTV viewership consists of 13-34 year-olds.

# Snapchat features CNN daily news shows (22 August 2017), as well as NBC and The New York Times.

Source: <http://www.journalism.org/2017/09/07/news-use-across-social-media-platforms-2017/>

### Ofcom: Adults' media use and attitudes. Report 2017 (UK specific)

Date: June 2017

#### Main findings & contributions

# Older people are embracing smart and social technology

# Smartphones are becoming an essential tool for navigating everyday life

# However, respondents report certain activities that they prefer not to do on a smartphone, such as watching TV, working on documents, and competing forms

# Managing mobile data is a challenge: there is confusion about how much data is required for different activities, leading to a range of strategies, such as changing contracts, buying top-ups, not doing certain activities online or only using public Wi-Fi

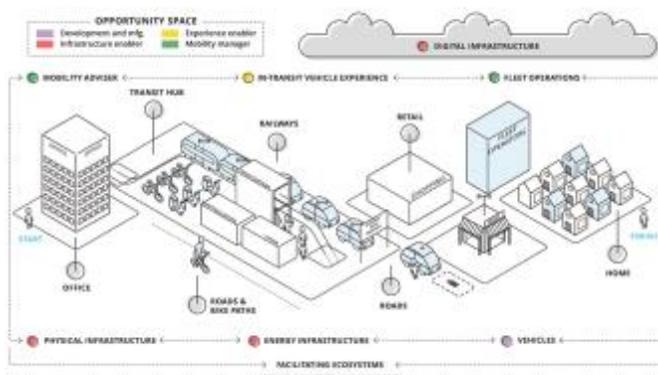
Source:

[https://www.ofcom.org.uk/\\_\\_data/assets/pdf\\_file/0020/102755/adults-media-use-attitudes-2017.pdf](https://www.ofcom.org.uk/__data/assets/pdf_file/0020/102755/adults-media-use-attitudes-2017.pdf)

# Industry reports

## An overview of recent findings on media consumption

Figure 1. The future mobility ecosystem



Source: Deloitte analysis.

Deloitte University Press | [dupress.deloitte.com](https://dupress.deloitte.com)

### Deloitte: Experiencing the future of mobility

Date: 17 August 2017

#### Main findings & contributions

The report offers an overview of potential product and service offerings for passengers in the new ecosystem of personal mobility (autonomous and connected vehicles).

# Video/broadcasting: There is more time available to consume video content; new types of interactive, AR/VR, immersive videos

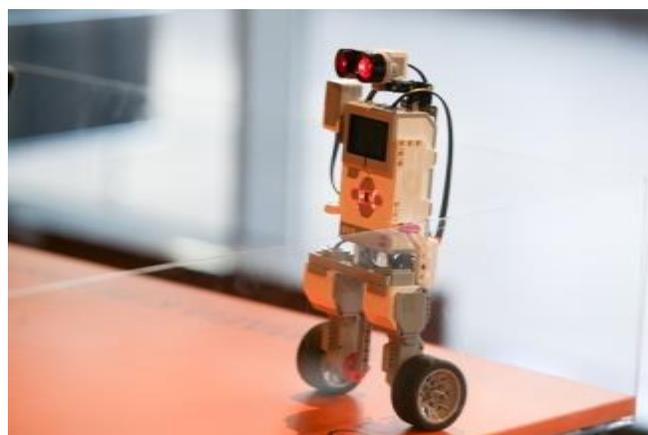
# Advertising: Targeted and more in-depth campaigns along journey routes; interactive in-vehicle advertising

# Music: Integrated personalized listening experiences

# Gaming: Interactive AR/VR gaming in vehicles

# Education: Vehicle interiors and content designed to support learning and productivity

Source: [https://dupress.deloitte.com/dup-us-en/focus/future-of-mobility/opportunities-for-media-and-entertainment-industry.html?icid=dcom\\_promo\\_featured|global;en](https://dupress.deloitte.com/dup-us-en/focus/future-of-mobility/opportunities-for-media-and-entertainment-industry.html?icid=dcom_promo_featured|global;en)



### Ericsson Consumer Lab: Merged reality. Understanding how virtual and augmented realities could transform everyday reality

Date: 21 June 2017

#### Main findings & contributions

# 7/10 early adopters expect VR/AR to change everyday life fundamentally in six domains; media, education, work, social interaction, travel and retail

# Consumers expect virtual screens to start replacing television and theaters in less than a year

# Lack of mobility, bulky headsets and network lag hinders merged reality

# 5G is central for merged reality and for providing mobility, improving social experiences and addressing nausea and sickness in VR

Source: <https://www.ericsson.com/en/networked-society/trends-and-insights/consumerlab/consumer-insights/reports/merged-reality>



# Media consumption trends Q3 2017



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