

How US Viewer Attention Has Changed Post COVID-19

The pandemic has altered viewers' content consumption habits in ways that may never revert to pre-COVID norms. The marketing implications are significant.

By Yan Liu, CEO/Co-founder of TVision

Early on in the COVID-19 pandemic, when much of the world transitioned to a shelter-in-place environment, there was a significant spike in “screen time” of all types. Broadly, daytime television usage increased by 77%, while average daily OTT consumption increased 22%.

Over time, linear and OTT TV consumption has slightly decreased, as communities continue to open up and summer weather brings more people outside. Still, OTT viewership remains 13% higher, and Linear 7% higher than pre-COVID-19 norms.

What do the numbers mean to marketers?

These numbers reinforce the need for more precise methods of measuring viewer engagement, and for translating that engagement into actionable intelligence from a marketing perspective.

At TVision, we've devised a methodology for measuring actual viewer *attention* — by determining who is in the room when the screen is on, and whether their eyes are actually on the screen. And what we've found since the pandemic began is that while average viewability and attention ticked slightly lower, the total amount of television usage massively offset that decrease, making overall attentive television viewing significantly greater during this timeframe. So it becomes a matter of sifting through all the available opportunities to determine which ones offer the best potential ROI.

But the TV isn't the only screen anymore

In addition, research during the pandemic revealed that non-video content producers have also captured a significant portion of viewer attention. Specifically, gaming network usage has grown by more than 200%, according to Verizon. And because gaming competes directly with other ad-revenue-based video media, the implications for marketers are obvious.

The closer you look, the more you see

A more granular breakdown of evolving viewer habits illustrates the value of improved performance metrics. Another measure of the increased amount of time that people were spending at home early in the pandemic, for example, was the decline in mobile handoffs — that is, when service transfers from one tower to another as the person using the device is traveling. At the peak of the pandemic, mobile handoffs were down by 35%. Minutes of use, on the other hand, went *up* by 38%.

In other words, people were less mobile but were using their “mobile” devices more often.

An even deeper dive into the numbers is cause for concern among traditional TV providers. During the pandemic, there was a surge in gaming on devices, peaking at 213%, and streaming video, which peaked at 41%. (There was also an enormous increase in the use of collaboration tools — 982%. But this was due largely to a growing reliance on online meeting technologies, such as videoconferences, in the new work-from-home environment, so this has little relevance for marketers.)

COVID impacted *what* people watch as well as *how* they watch

One of the most obvious impacts of the pandemic on broadcast television programming was the sudden absence of live sporting events. The NBA and NHL both went on extended hiatus, college basketball canceled its annual “March Madness,” and Major League Baseball delayed the start of its season by four months. Viewable ads from live sports, which had comprised 6% of total TV ads during the previous year, suddenly dropped to considerably less than 1%. (It will be interesting to see how viewers respond to the resumption of live sports, with curtailed seasons and events contested without fans in attendance.)

On the other hand, ESPN’s showing of “The Last Dance,” a documentary about Michael Jordan that the network aired sooner than intended, performed well above expectations for linear programming. It was an object lesson on the importance of increased agility among network programmers and ad buyers in an ever-more-fluid environment.

Issue Fatigue Impacts Ad Effectiveness

Another finding that TVision’s research surfaced during the pandemic involved the fluidity of viewer attention. With so many brands across all categories rushing COVID-themed ads into production, TVision had the unique opportunity to study the phenomenon of “ad wear-out” in a real-world setting in real time.

The conclusion: ad wear-out is a real thing. Initially, COVID-19 ads outperformed the average, but overall attention declined by 13% over 10 weeks, almost irrespective of the brand.

“This is the first time I’ve been able to look at a whole pool of ads that have consistent messaging across multiple brands,” said Tristan Webster, TVision’s VP of Data and Analytics. “It is clear that the TV-watching public is tired of COVID-19-related messaging.”

Want to learn more?

If you would like additional insights into TVision’s improved performance metrics, you can watch this webinar: <https://info.tvisioninsights.com/tv-watching-has-changed-webinar>.