

# ResearchBods<sup>®</sup>

**THE CUSTOMER AGENCY**

DRIVEN BY CURIOSITY  
POWERED BY TECHNOLOGY

---

**PUBLIC MOMENTS, PRIVATE MOMENTS**

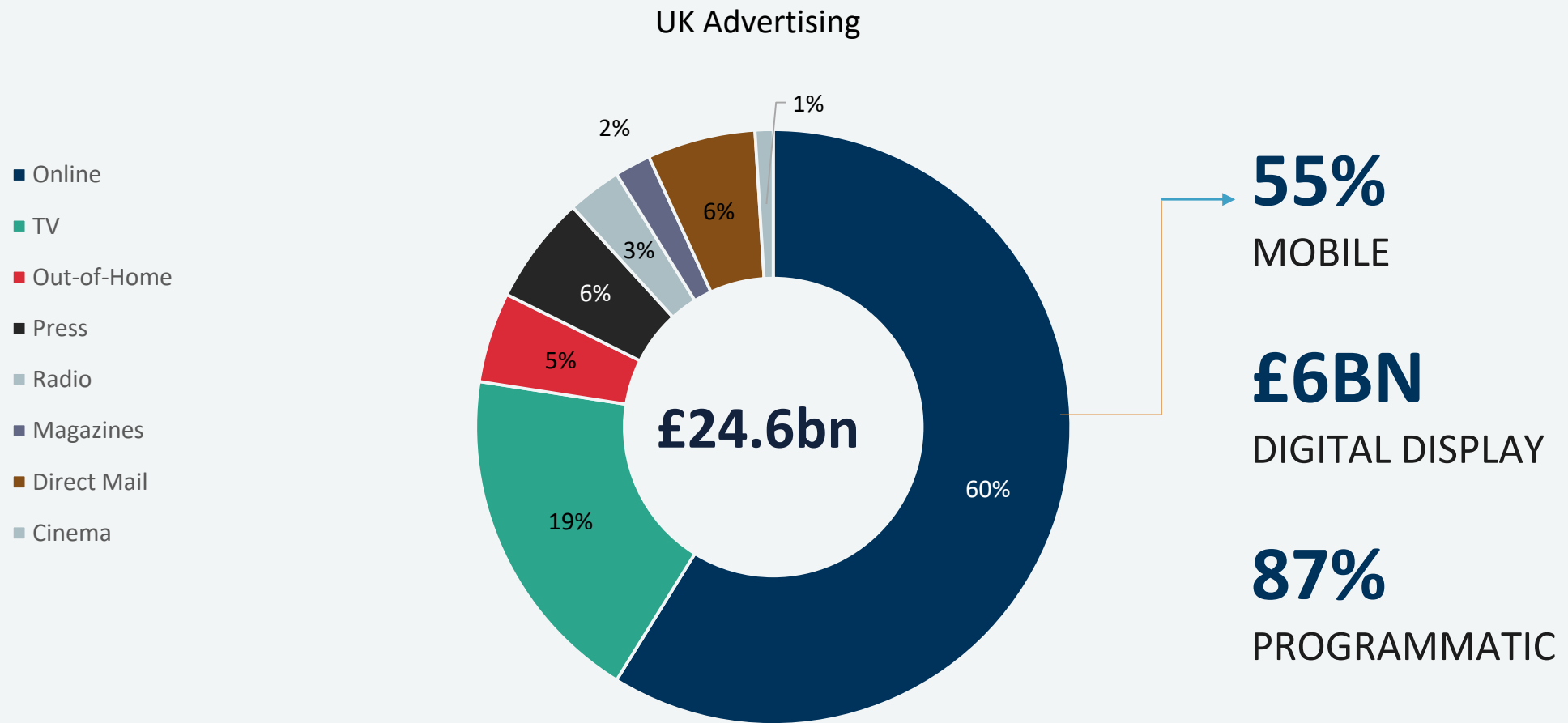
Understanding mood, mindset and location to better target advertising.

---

# JCDecaux

## ONLINE ADVERTISING

MAKES 60% OF THE ADVERTISING MARKET, OVER HALF OF WHICH IS ON MOBILE.



Online video will reach half of conventional television viewing this year

Online video ad spend will be worth a third of the TV ad market in 2021

Press Release



16 September 2019

## Online video viewing to reach 100 minutes a day in 2021

The average person will spend 100 minutes each day watching online video in 2021, up from 84 minutes this year, according to Zenith's *Online Video Forecasts 2019\** report, published today. That's the equivalent of watching 25 continuous days of video in 2021.

The amount of time people spend viewing online video has grown rapidly across the world, at an average rate of 32% a year between 2013 and 2018, boosted by improvements in display sizes and quality of mobile devices, faster mobile data connections, and the spread of connected TV sets.

China and Sweden have the keenest online video viewers, with the average person in each country expected to spend 103 minutes a day watching online video this year. These are the only countries where online video viewing exceeds 100 minutes a day, but by 2021, Zenith expects Canada, India, Mexico, the UK and the USA to join the list.

"The consumption of online video is growing rapidly, and the average person will spend half as much time viewing online video as they spend viewing conventional television this year," said Jonathan Barnard, Head of Forecasting at Zenith. "This fast-expanding supply of audiences is fuelling rapid growth in demand from advertisers, making online video the fastest-growing digital channel by advertising expenditure."

## Online video adspend will be worth a third of the TV ad market in 2021

Zenith forecasts that advertising expenditure on online video will rise from US\$45bn this year to US\$61bn by 2021, at an average rate of 18% a year, compared to 10% a year for internet advertising as a whole. Meanwhile television adspend will shrink from US\$183bn to US\$180bn over the same period, as ratings continue to drop in key markets. Online video will therefore rise to the equivalent of a third of the entire TV market in 2021, up from a quarter this year.

## DOOH & MOBILE CREATIVES ALIGNED

---

FOUR DIFFERENT **ASPECT RATIOS** GENERATE **96%** OF ALL WEEKLY VIEWED IMPRESSIONS.

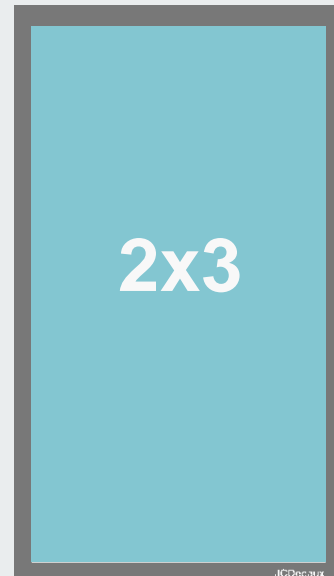
**71%** of all viewed impressions available for video content.



**=57%**



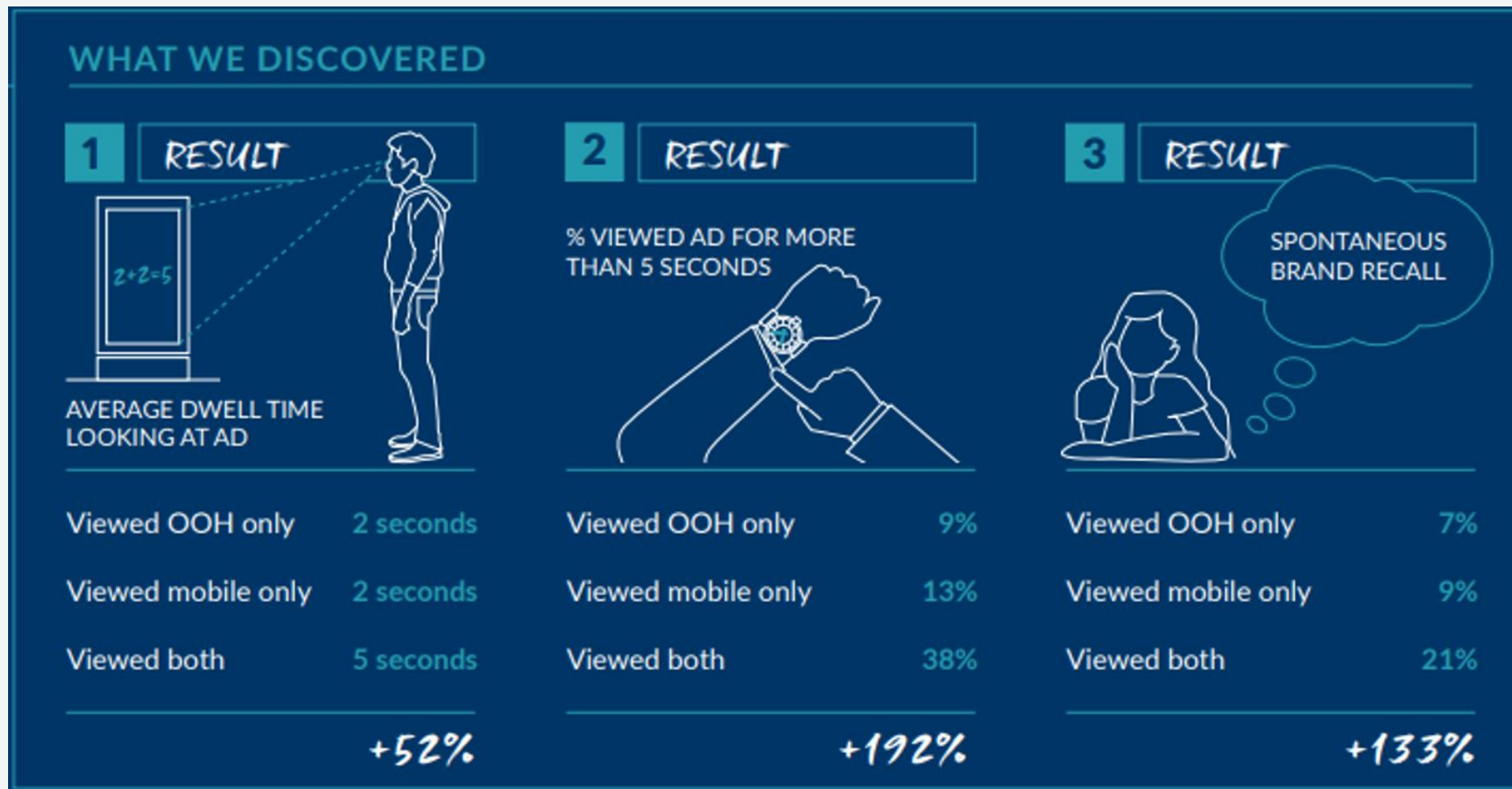
**=27%**



**=7%**



**=5%**





## THEREFORE... THE 2 SCREEN FUTURE

---



# THE HYPOTHESIS

Mobile usage & behaviours are different when at home & when out of home



## HOW DO WE CAPTURE ACTUAL, INSTEAD OF CLAIMED, MOBILE USAGE DATA?

---



107 COMMUTERS RECRUITED



PASSIVE METERING APP DOWNLOADED



MOBILE USAGE MONITORED

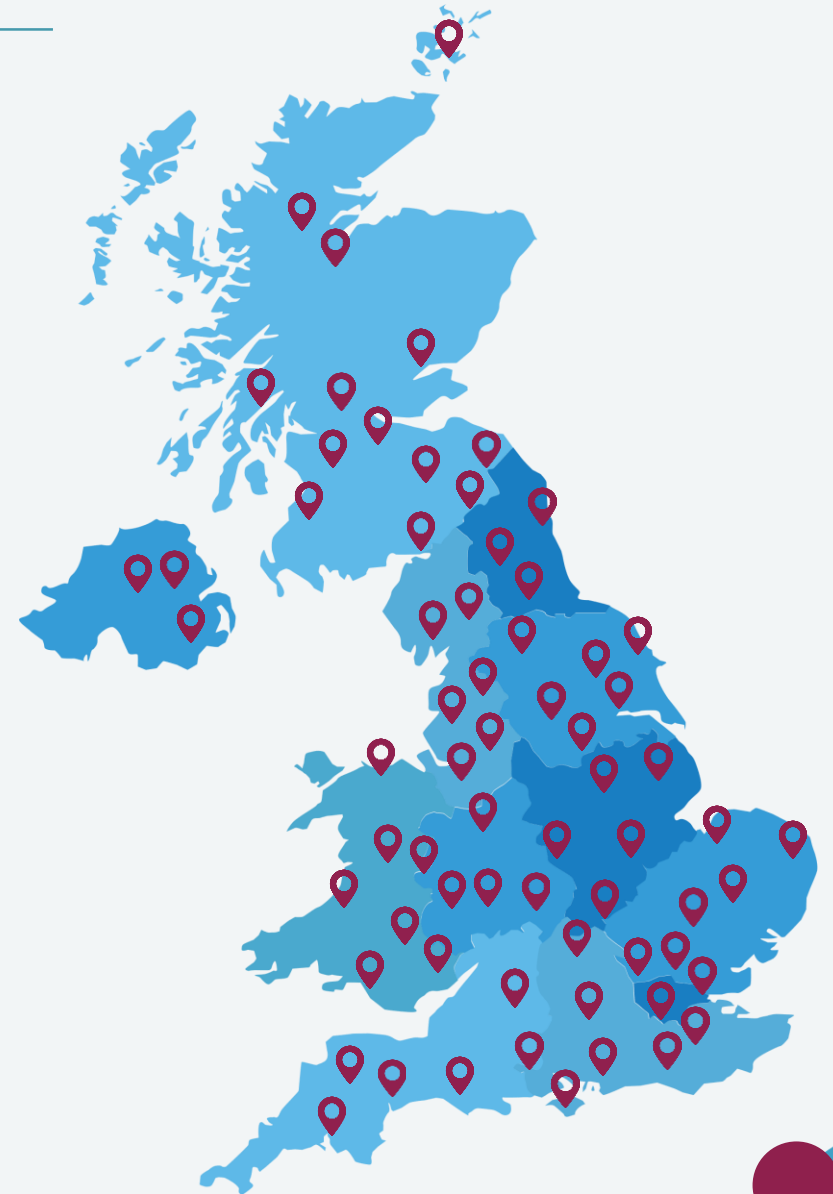
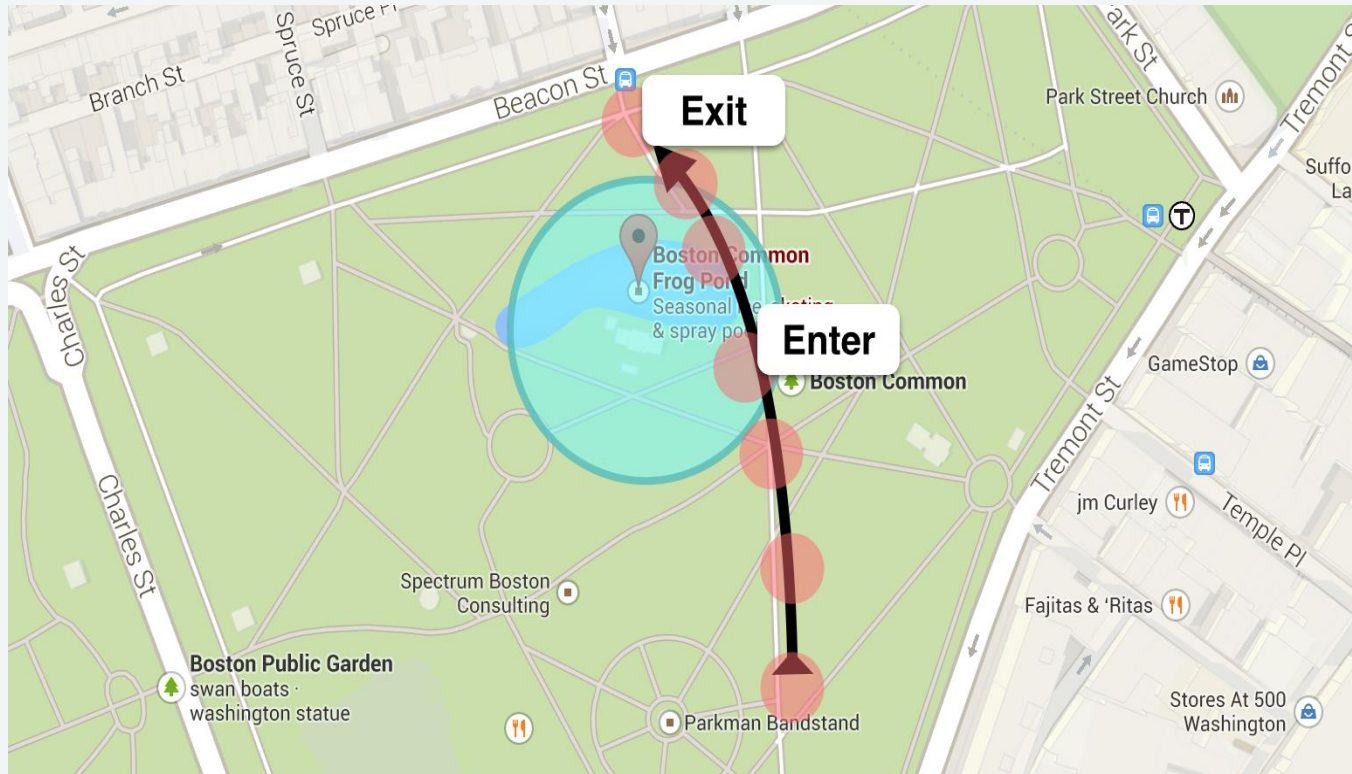


WEB AND APP ACTIVITY RECORDED





# WE NEEDED TO PUT PEOPLE ON THE MAP WITH GEO – LOCATION



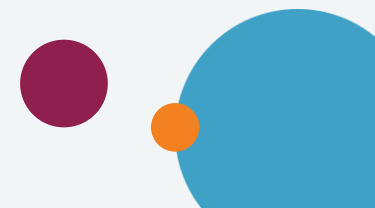
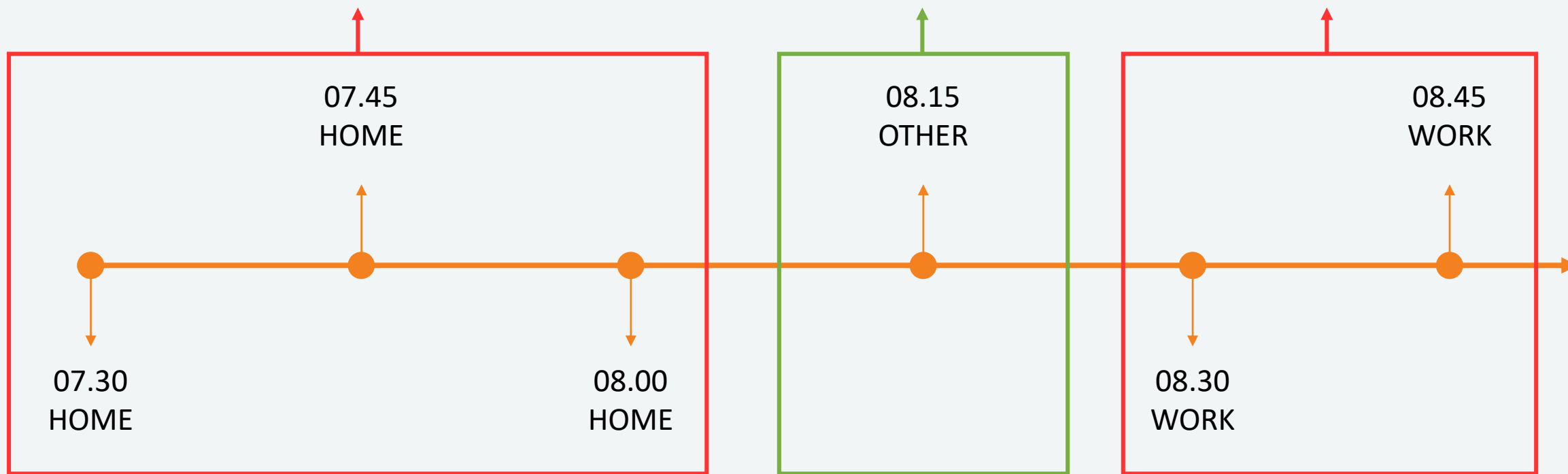
# HOW DO WE PINPOINT THE COMMUTING PERIOD?

---

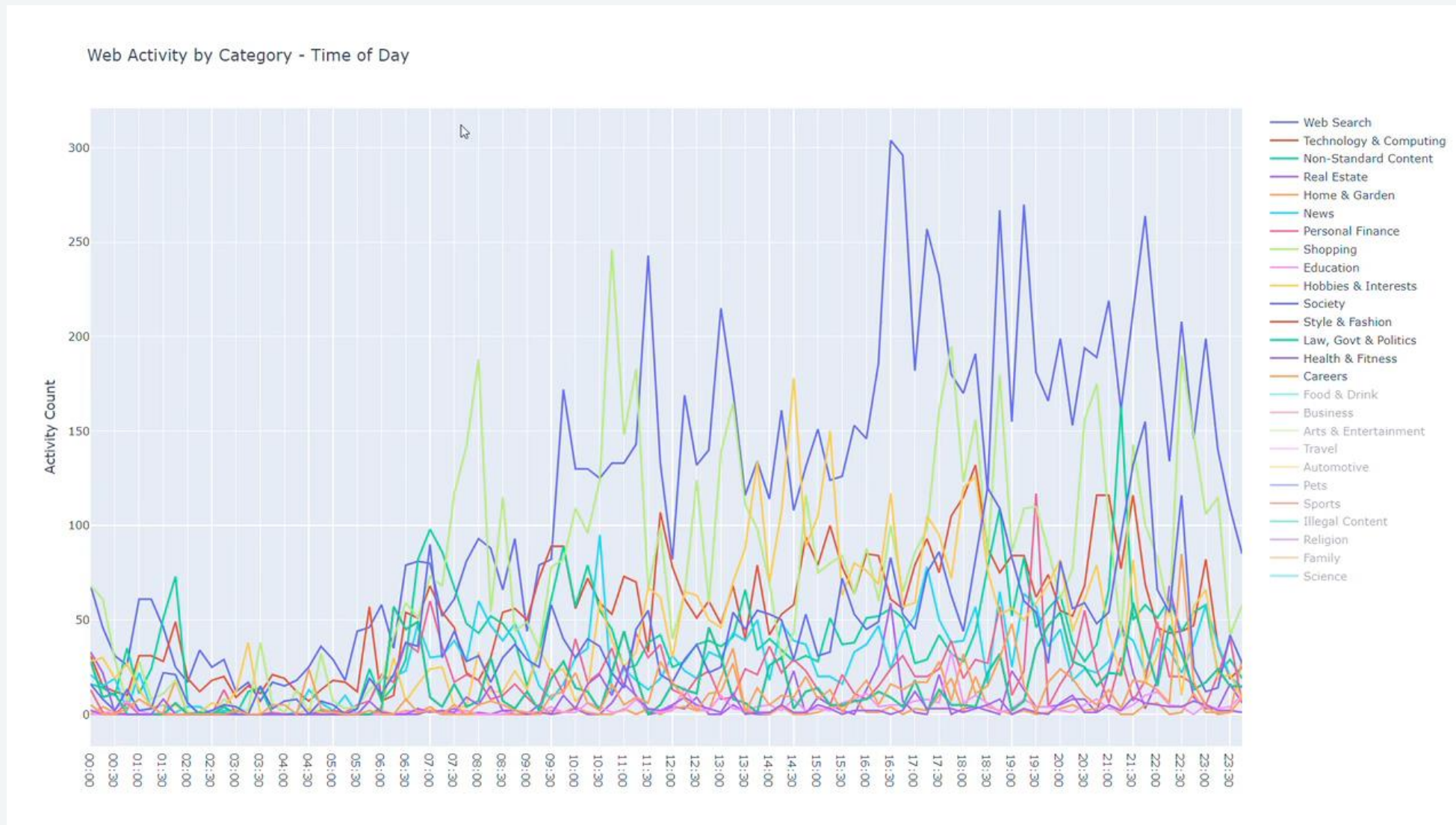
REPEAT LOCATION RECORDINGS  
FROM HOME

COMMUTING PERIOD

REPEAT LOCATION RECORDINGS  
FROM WORK



# DRILLING DOWN INTO THE DATA WITH INTERACTIVE CHARTING



# THE RESULTS

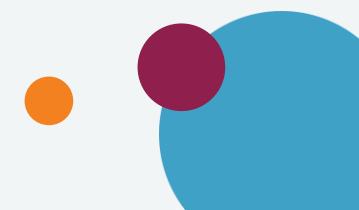
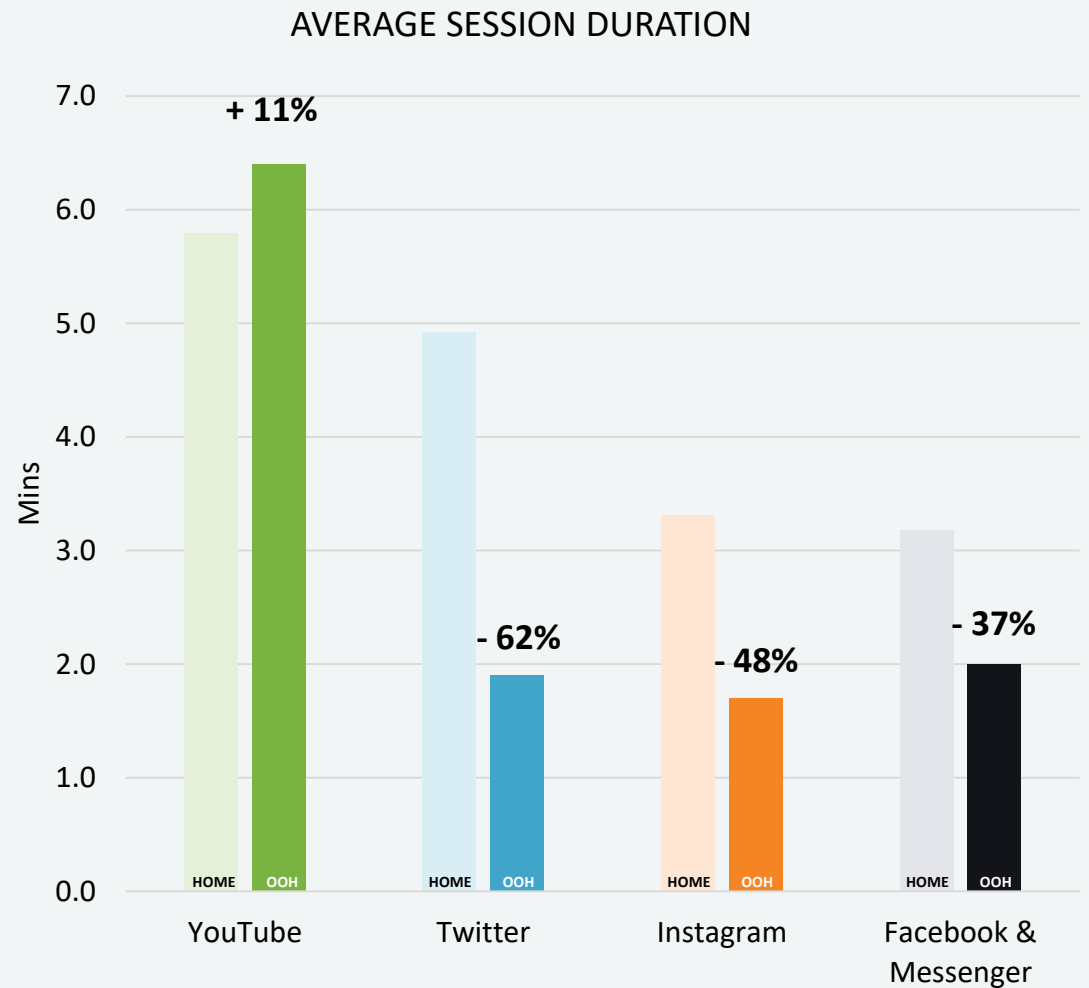
Commuters are less focused while commuting compared to at home, spending less time in apps and flitting between categories more often. Visual content is king





# LESS ATTENTION PAID WHEN USING SOCIAL CHANNELS OOH vs AT HOME

$$\text{AVERAGE SESSION DURATION} = \frac{\text{SESSION DURATION}}{\text{FREQUENCY}}$$



## WEB SEARCH HIGHER DURING EVENING COMMUTE VS MORNING

---



WEB ACTIVITY IS HIGHEST DURING THE TYPICAL EVENING COMMUTING PERIOD, BETWEEN 4.30-7PM.



SHOPPING SEARCHES PEAK ON WEEKDAYS AT 6.45PM



## INSTAGRAM USAGE GROWS WHILE COMMUTERS ARE OOH

---



INSTAGRAM ACCOUNTS FOR **22%** OF TIME SPENT ON SOCIAL MDEIA AT HOME



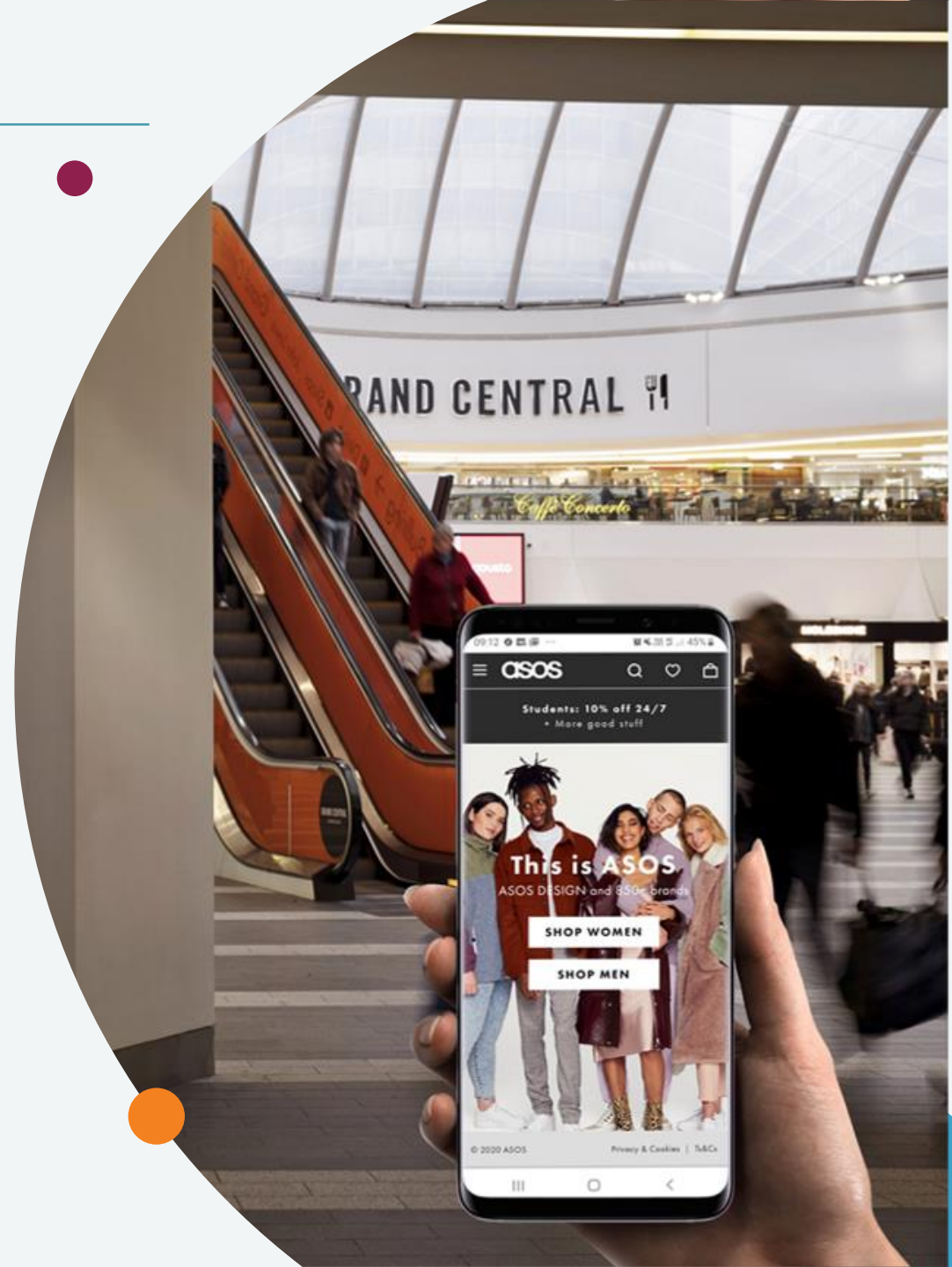
DURING THE COMMUTE INSTAGRAM'S SHARE RISES TO **30%**



## FASHION IS A MAJOR SEARCH CATEGORY WHEN OOH

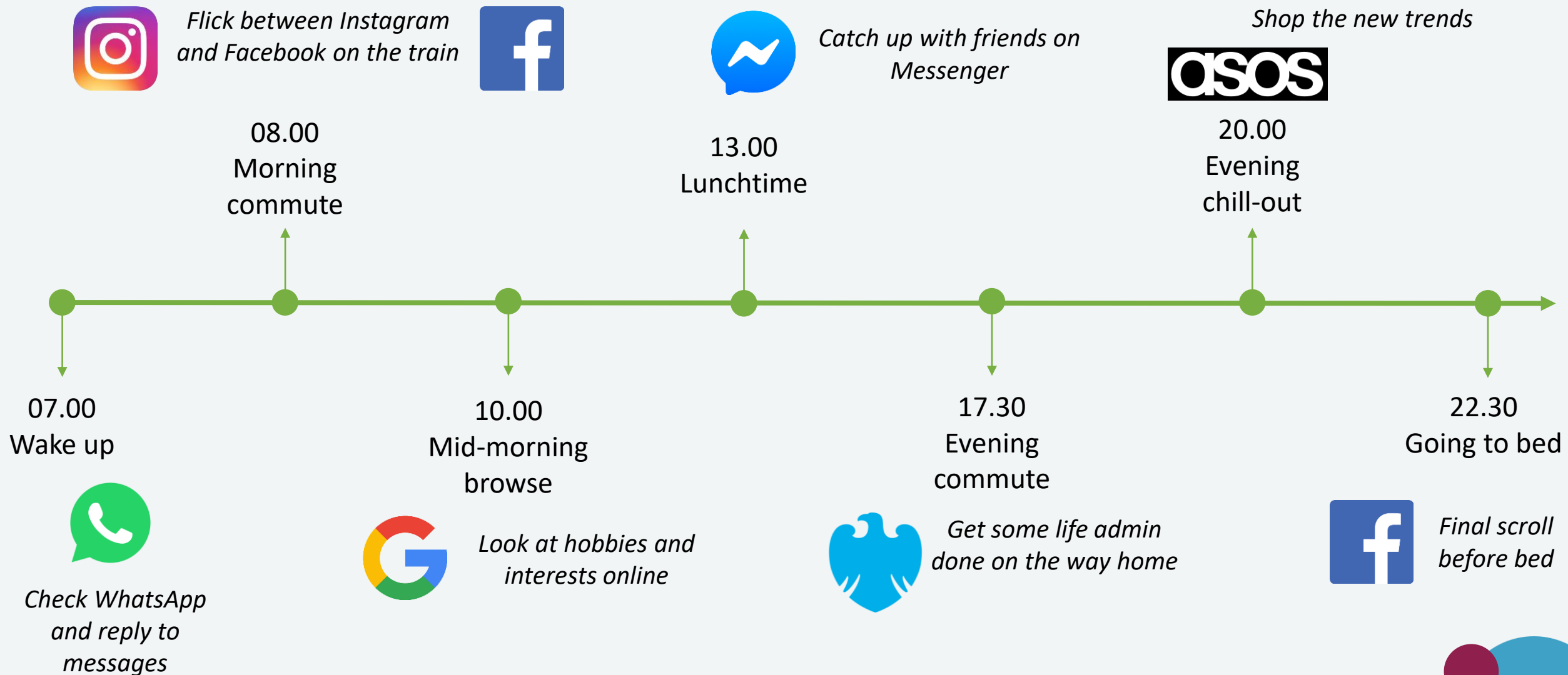


WHEN OUT OF HOME, SHOPPING FOR  
STYLE AND FASHION ACCOUNTS FOR  $\frac{1}{4}$  OF  
ALL MOBILE SHOPPING TIME





# SO WHAT MIGHT A TYPICAL DAY LOOK LIKE FOR THE AVERAGE COMMUTER'S MOBILE USAGE?



# ResearchBods<sup>®</sup>

# JCDecaux

**THE CUSTOMER AGENCY**

DRIVEN BY CURIOSITY  
POWERED BY TECHNOLOGY

---

For more information please contact:

Joe Phillips  
Senior Insight Executive  
jphillips@researchbods.com

George Kelly  
Marketing Executive  
george.kelly@jcdecaux.com

---

 **WATCH  
OUR VIDEO**



PLEASE THINK BEFORE YOU PRINT.

Part of the STRAT7 group