

# In Sight: new trends in TV



thinkbox<sup>■</sup>

# Context Effects



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Map the Territory

thinkbox<sup>■</sup>



# Context Effects

London, 6<sup>th</sup> March 2024

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THE  
TERRITORY

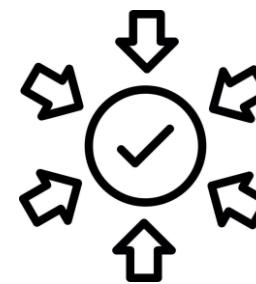
# Objectives

1



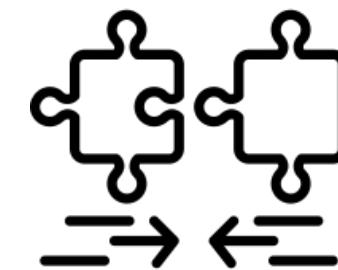
Does viewing context  
matter?

2



The optimal context  
at home?

3



Implications for  
advertisers?

# Approach

Inform

Explore

Understand

Measure

Literature review

Academic interviews:

- *Daniel Richardson, cognitive psychologist at UCL*
- *Patrick Alexander, anthropologist at Oxford Brookes*



20 x

households across UK

10 x

week long viewing experiments

ALONE / TOGETHER

DIFFERENT ROOM

DIFFERENT DEVICE

DIFFERENT CONTENT

8 x

household interviews

2,000

sample past day viewing diary

5,000

viewing occasions providing data for

**Structural Equation Modelling**

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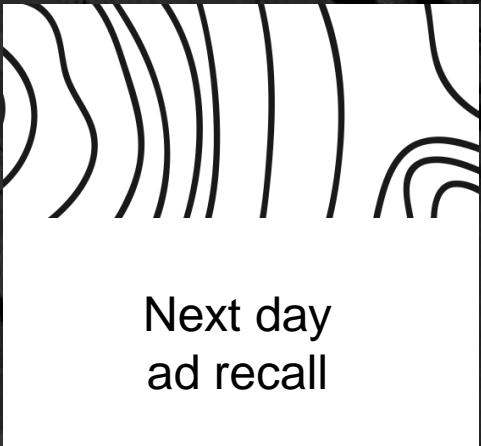
# Meet our households

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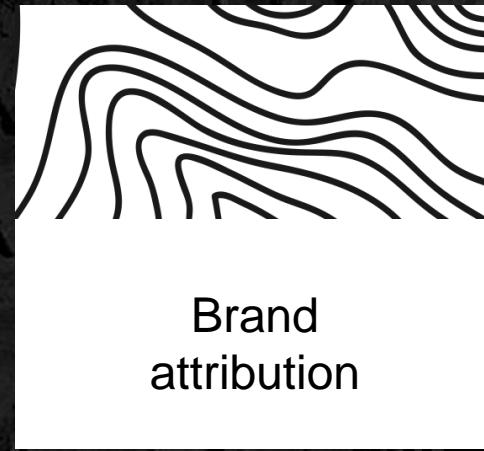


# A note on measuring ad effectiveness

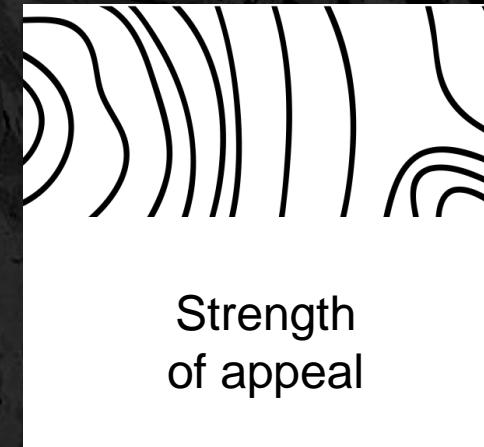
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Next day  
ad recall



Brand  
attribution



Strength  
of appeal



Took action after the  
ad

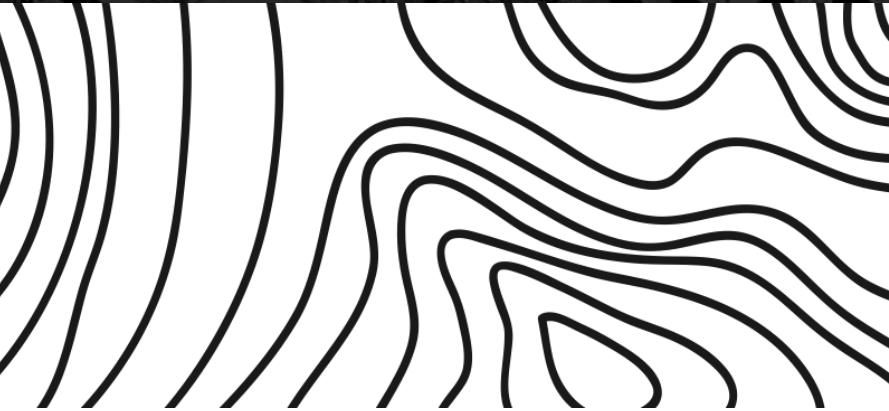
ad recall

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# A note on measuring ad effectiveness

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Next day  
ad recall

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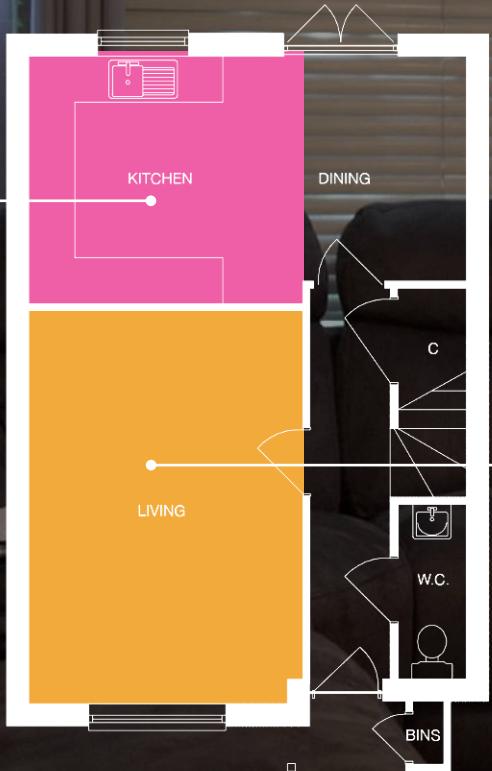


So where is  
ad recall highest  
in the home?

# The living room

176% ↗

higher vs.  
the kitchen



22% ↗

higher than  
all other rooms  
in the home



10% ↗

higher than  
in the bedroom

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A18. Do you remember seeing any advertising when you watched [OCCASION]? A5. Where were you when you watched [OCCASION]?

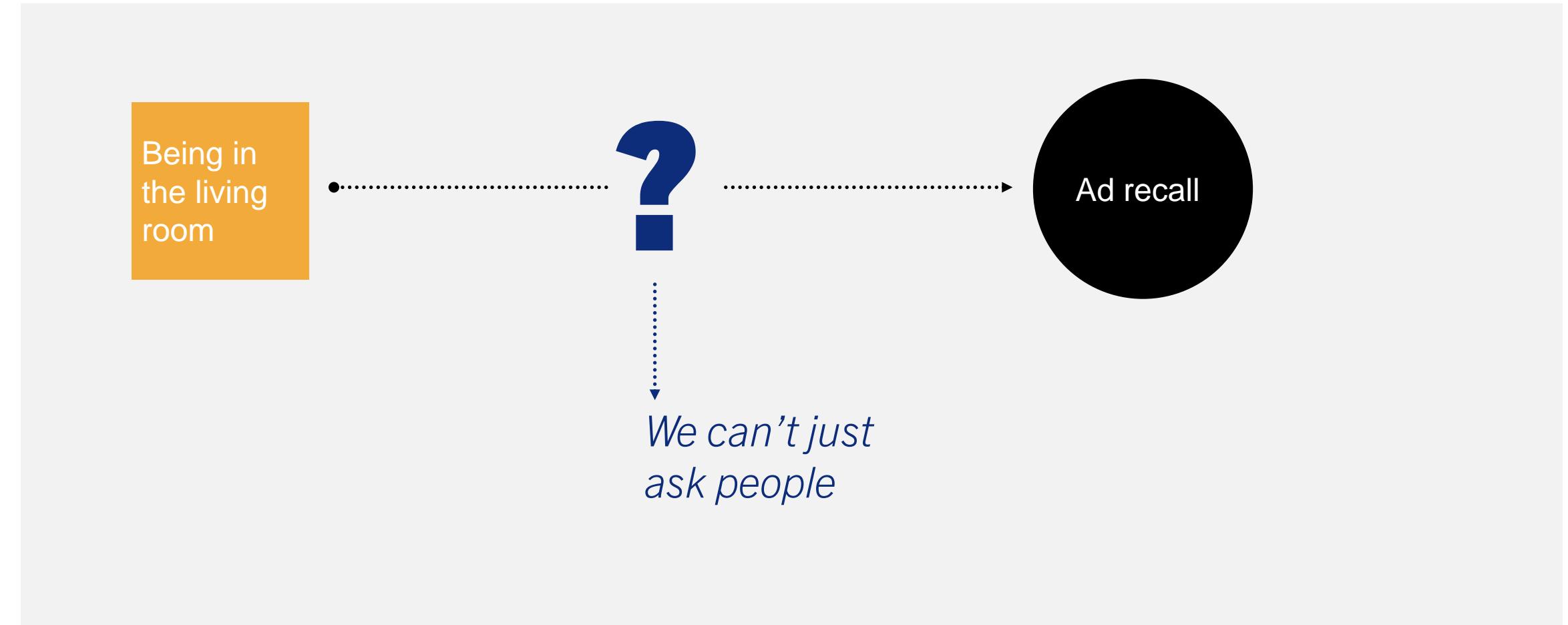
Base: 4,005 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

# What's going on?

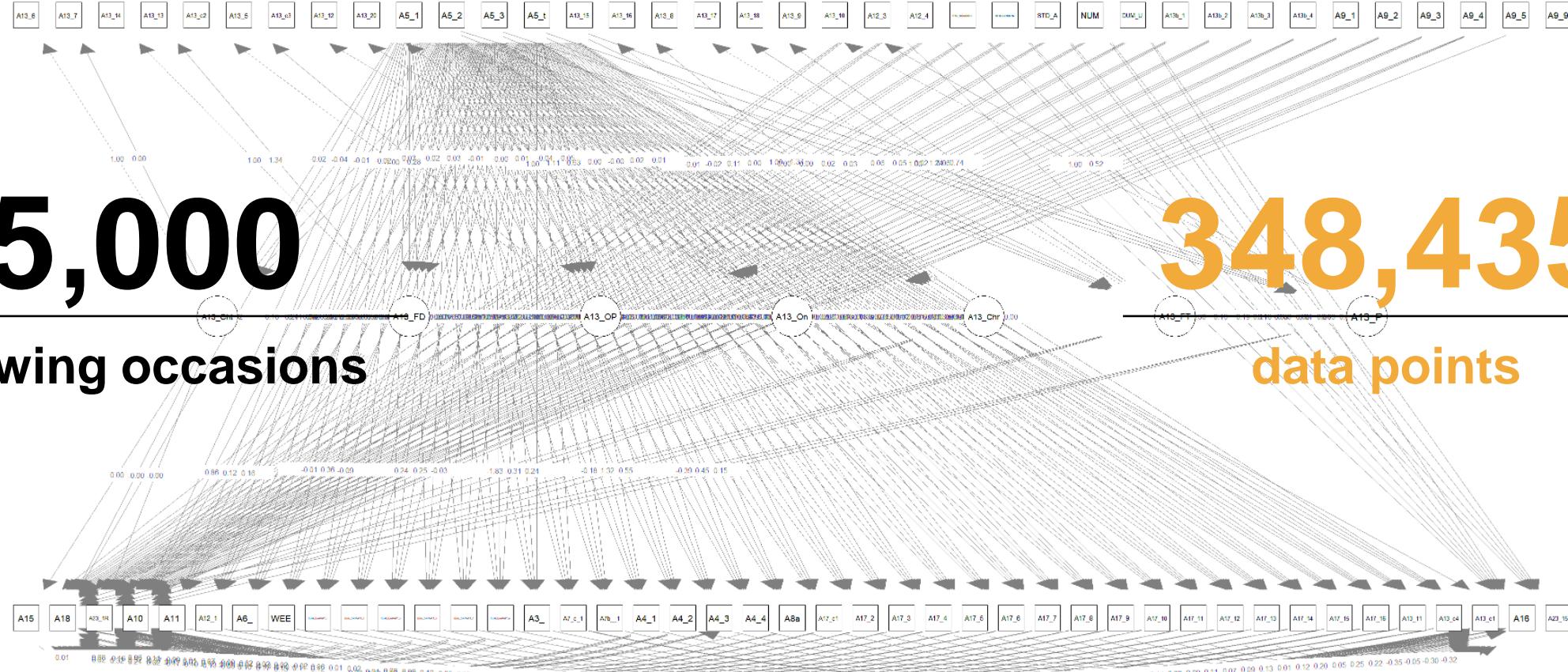
Being in  
the living  
room



*We can't just  
ask people*



# The data driving the Structural Equation Model



Analysis of 87 variables reveals **four big factors** that drive ad recall in the home – individually & collectively

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1 MOOD

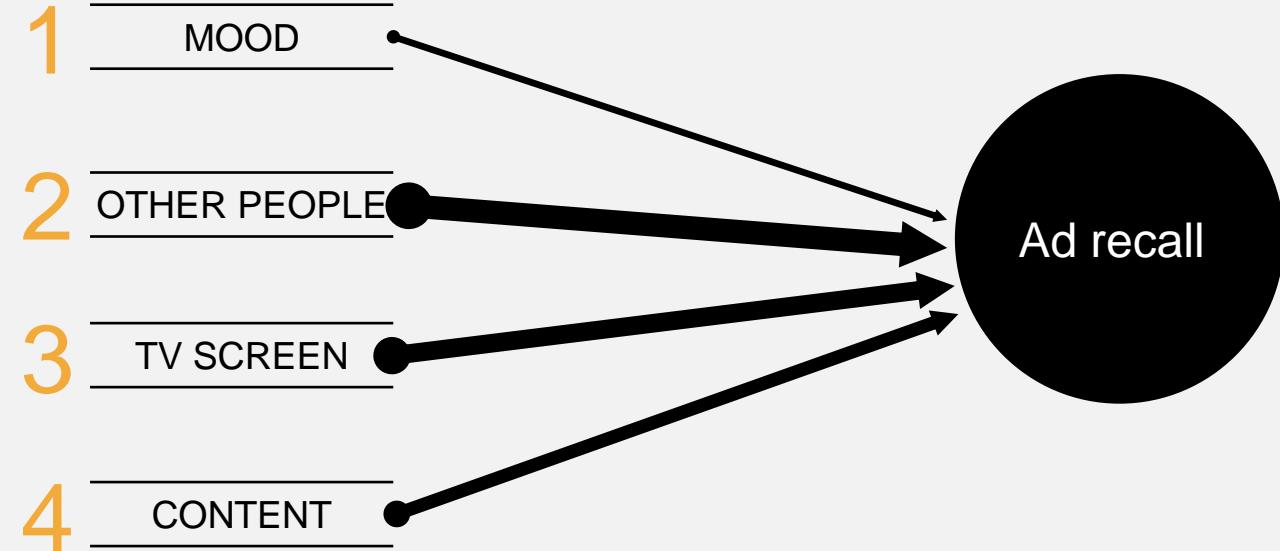
2 OTHER PEOPLE

3 TV SCREEN

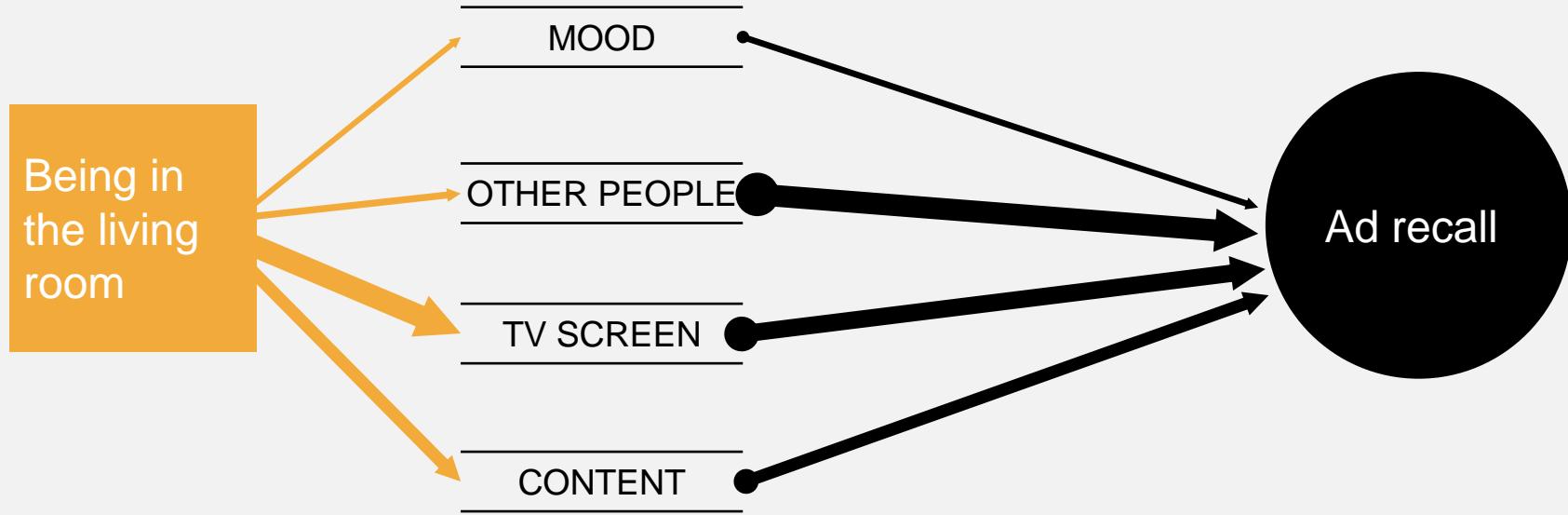
4 CONTENT

# The thicker the arrow the stronger the effect

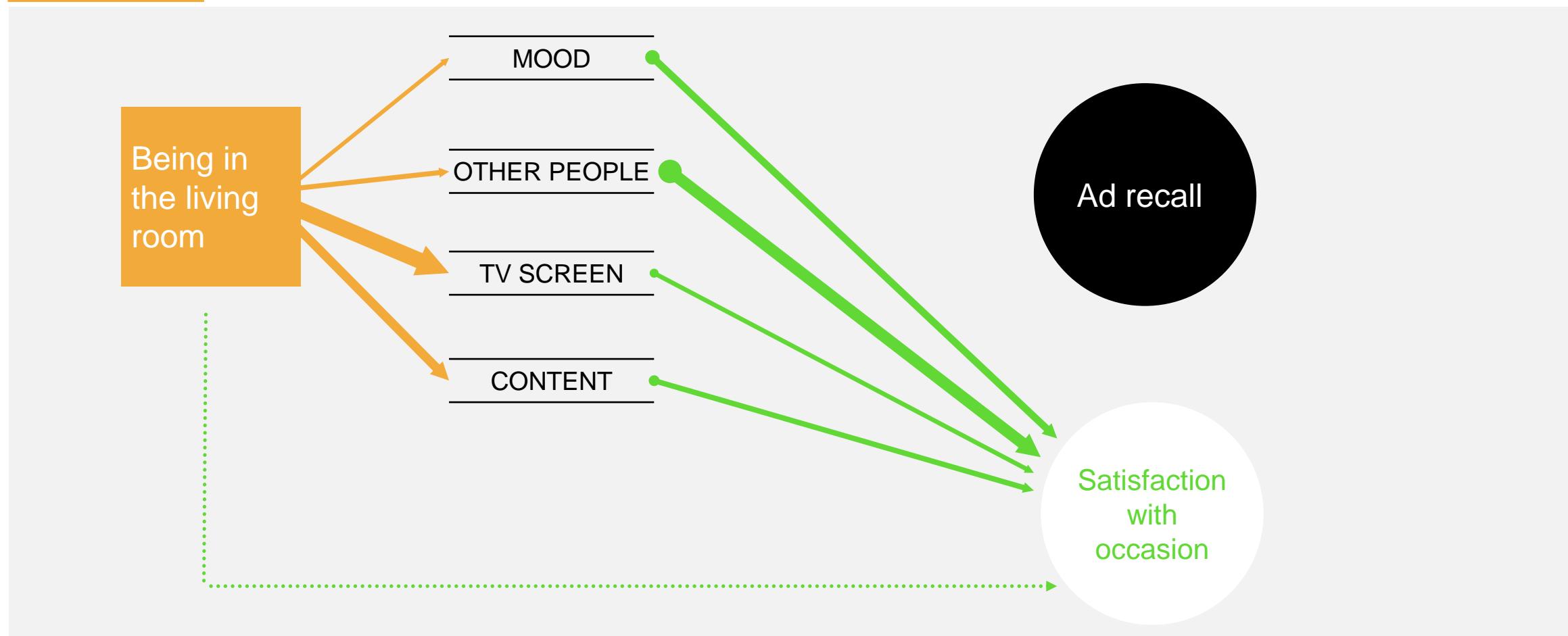
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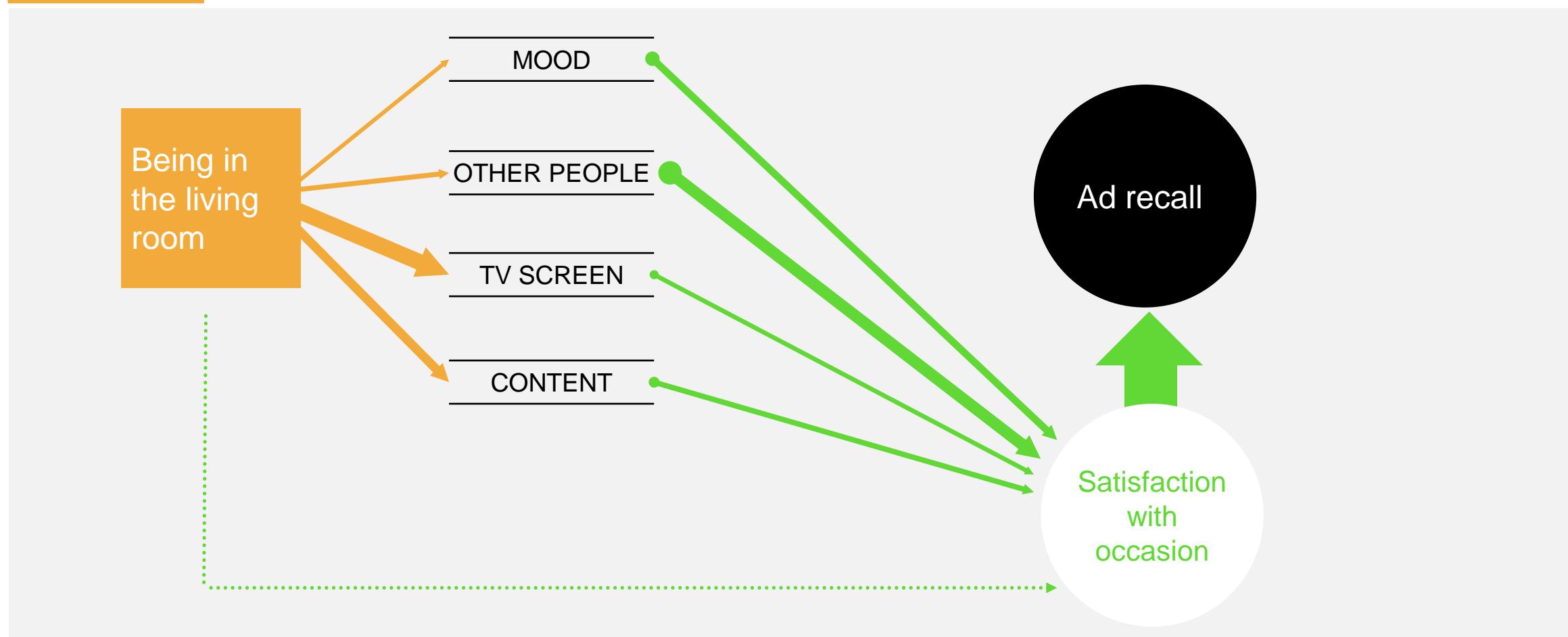
# The living room, uniquely, brings all these factors together



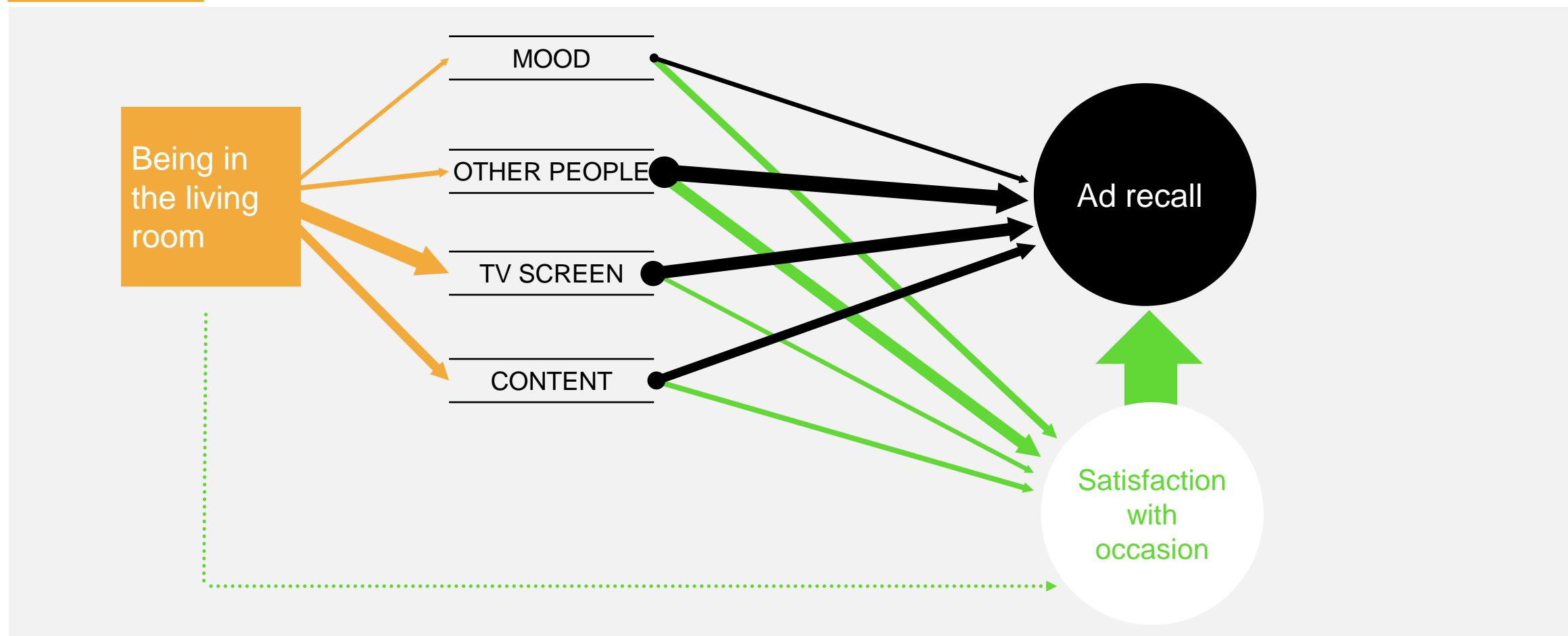
# And there's more - all these elements also affect satisfaction with the viewing occasion



# Satisfaction is a key driver of ad recall



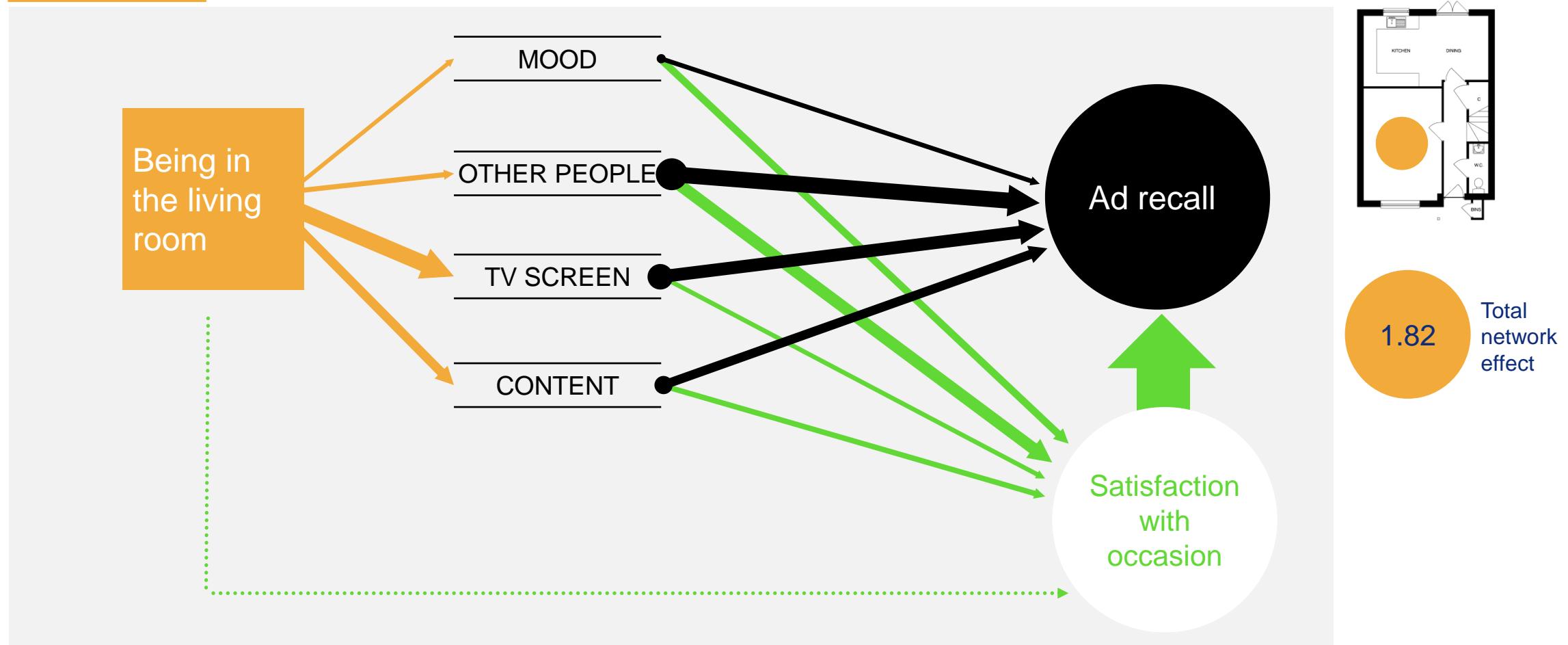
# The complexity of this system produces the strength of the effect



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# The total effect of this complex network produces a coefficient score of 1.82

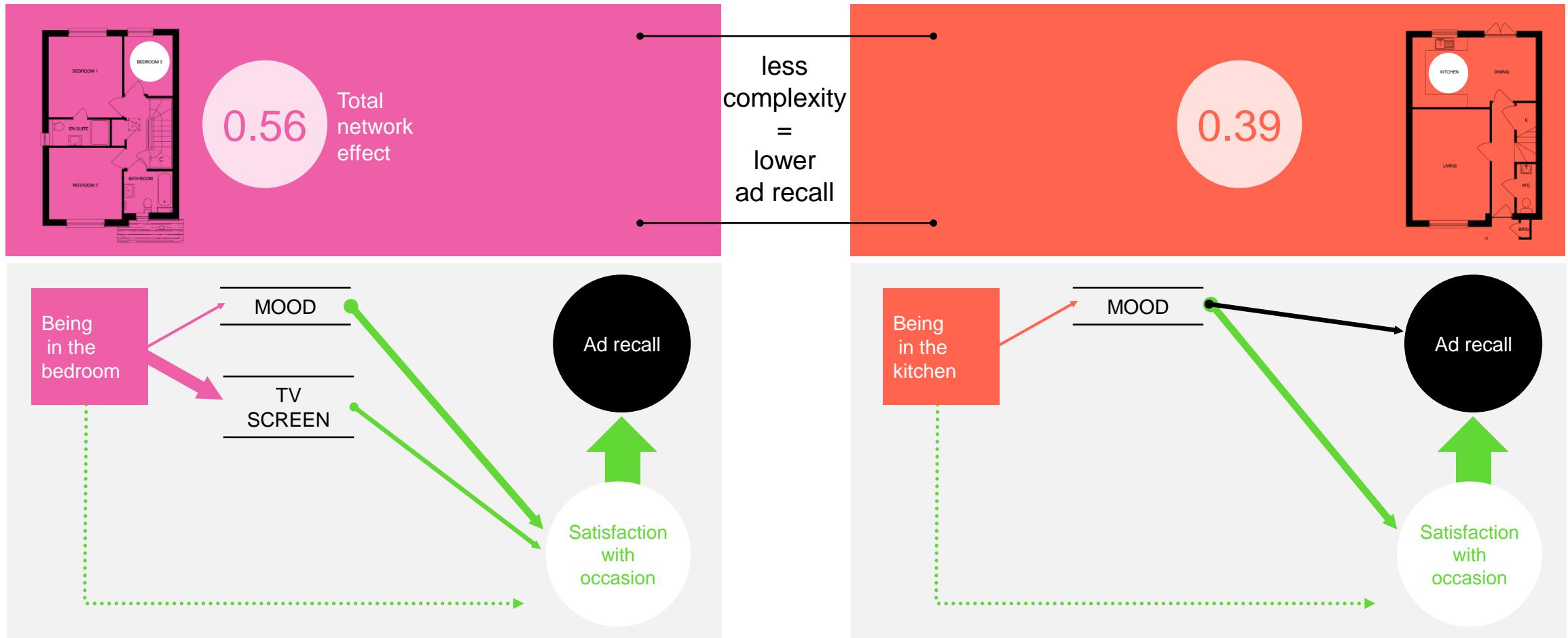


Source: Context Effects, Map the Territory & Tapestry Research, 2024

Sample: 2,017 adults aged 18-75 (nationally representative)

Structural Equation Modelling - calculated using 87 inputs and 4,004 viewing occasions where ads were present. Arrows are scaled based on coefficients obtained through SEM. Coefficients are calculated by combining direct & indirect effects of significant drivers of ad recall.

# For comparison - the less complex system in other rooms produces a much lower coefficient

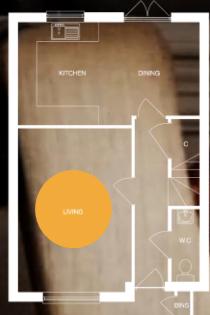


Source: Context Effects, Map the Territory & Tapestry Research, 2024

Sample: 2,017 adults aged 18-75 (nationally representative)

Structural Equation Modelling - calculated using 87 inputs and 4,004 viewing occasions where ads were present. Arrows are scaled based on coefficients obtained through SEM. Coefficients are calculated by combining direct & indirect effects of significant drivers of ad recall.

# Professional content dominates living room viewing



73%

Professional content on TV set

11%

Non-professional on phone / tablet

Barb data shows that 80.2% of TV set viewing is to professional content

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A3. Which of the following best describes the type of content that you watched, when you watched [Occasion]?

A7a. On which device did you watch [Occasion]? A5. Where were you when you watched [Occasion]?

Base: 5,003 past day viewing occasions.

Source: TRP Research & Thinkbox, analysis of full year 2023 Barb data, Individuals (4+)

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Why does the  
living room work  
in this way?

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# The living room is a unique environment

Living room

It's literally warmer

It's where the household spends most of its time

It's less hierarchical

It's where we have the important conversations

**It's the centre of gravity of the home**



# Other spaces are more hectic, hierarchical, and private

Kitchen

The kitchen is 'busy' in the minds of consumers (index: 240)

Bedroom

The bedroom is much more likely to be seen as 'private' (index: 208), a 'safe space' (index: 143), a 'sanctuary' (index: 186)

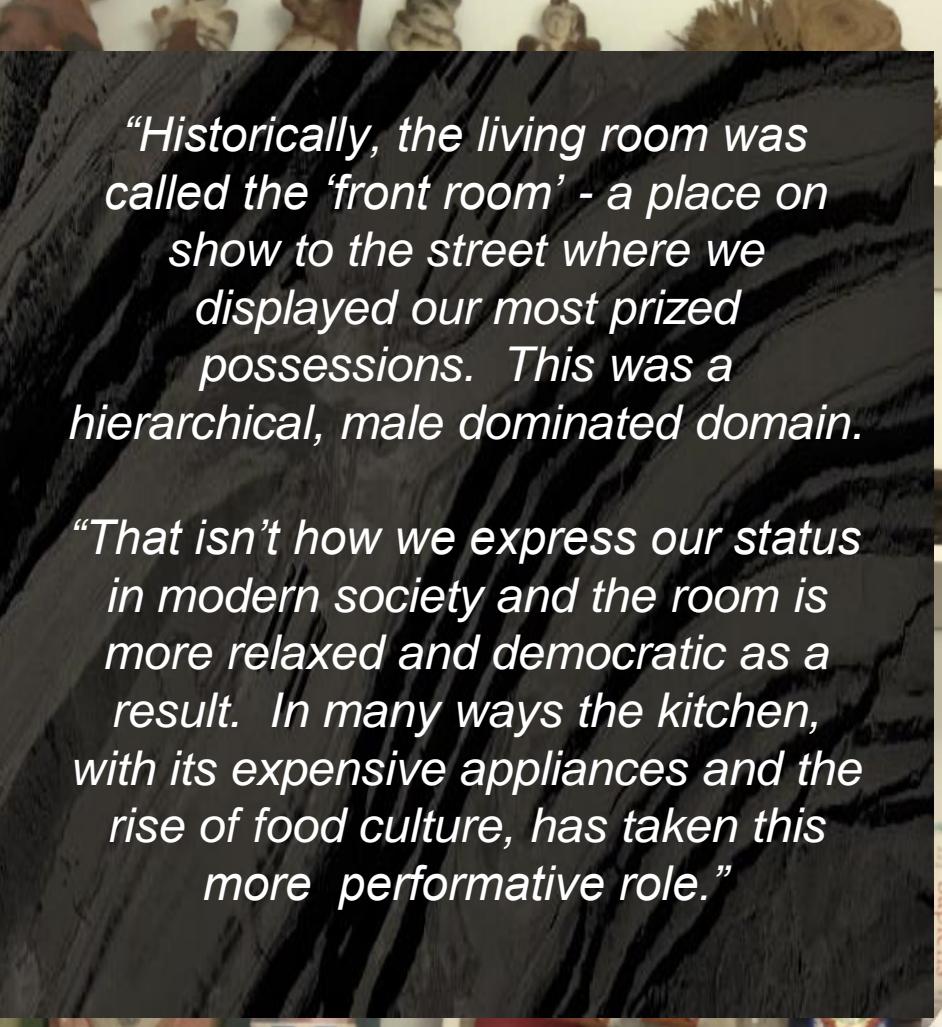


Source: Context Effects, Map the Territory & Tapestry Research, 2024

B1. Which of the following words or phrases do you associate with each of these rooms in your home? Index calculated vs. the average of three rooms (Bedroom, Kitchen, Living Room)

Base: 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

# Patrick Alexander, Anthropologist at Oxford Brookes



*“Historically, the living room was called the ‘front room’ - a place on show to the street where we displayed our most prized possessions. This was a hierarchical, male dominated domain.*

*“That isn’t how we express our status in modern society and the room is more relaxed and democratic as a result. In many ways the kitchen, with its expensive appliances and the rise of food culture, has taken this more performative role.”*





## Factor 1: Mood



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A photograph of three people sitting on a light-colored couch. On the left, a young man with blonde hair and a grey hoodie looks towards the center. In the middle, a young woman with brown hair and a black dress with a yellow and black patterned collar is smiling. On the right, a woman with blonde hair and a black top is laughing. A small white rectangular overlay is positioned in front of them, containing the text "Factor 1: Mood".

## Factor 1: Mood

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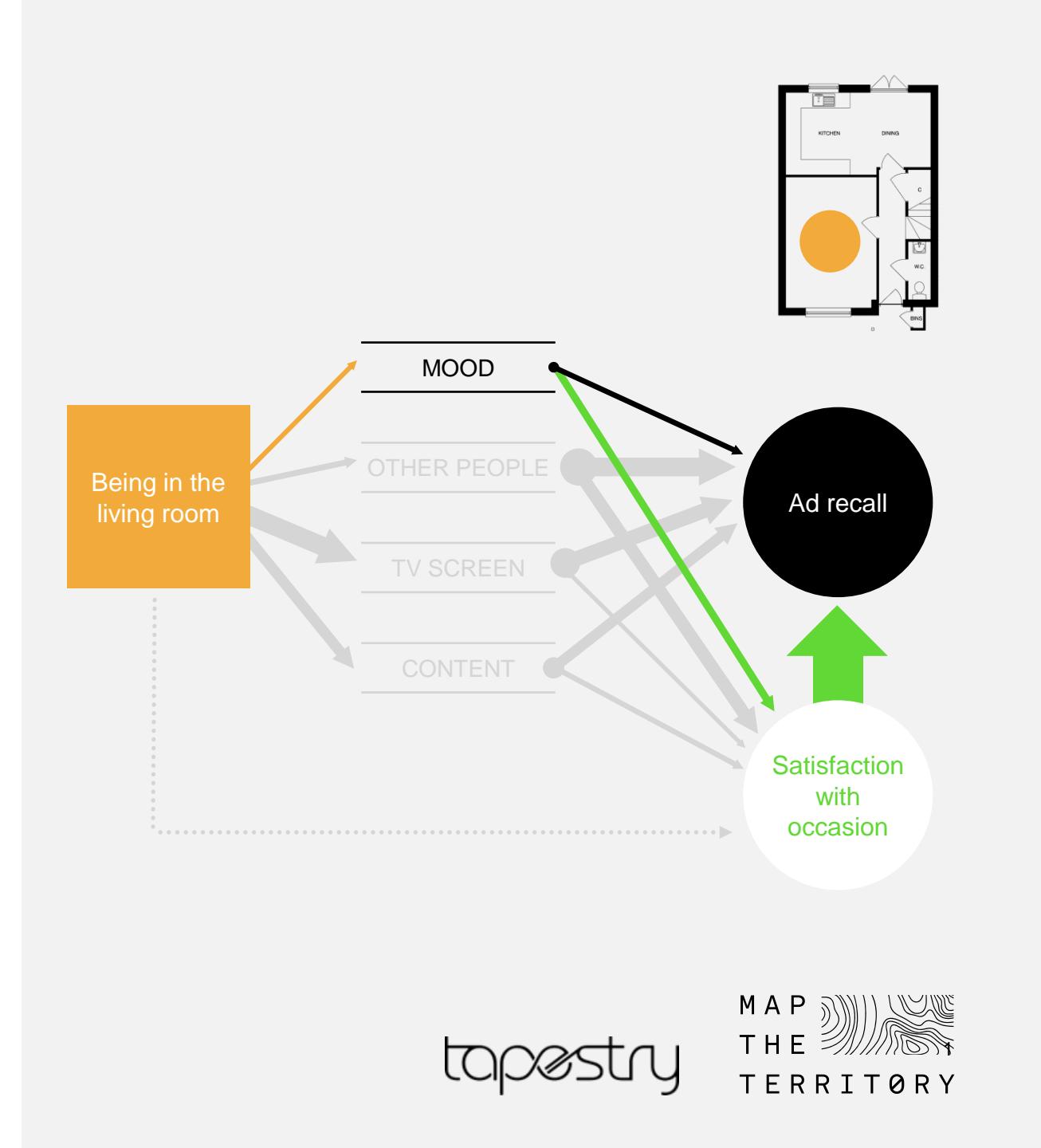


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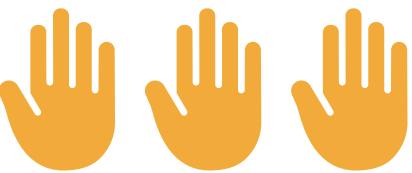


The living room makes us feel good. And when we're feeling happy, relaxed, and connected in this space we're most likely to recall an ad





## Factor 2: Other people

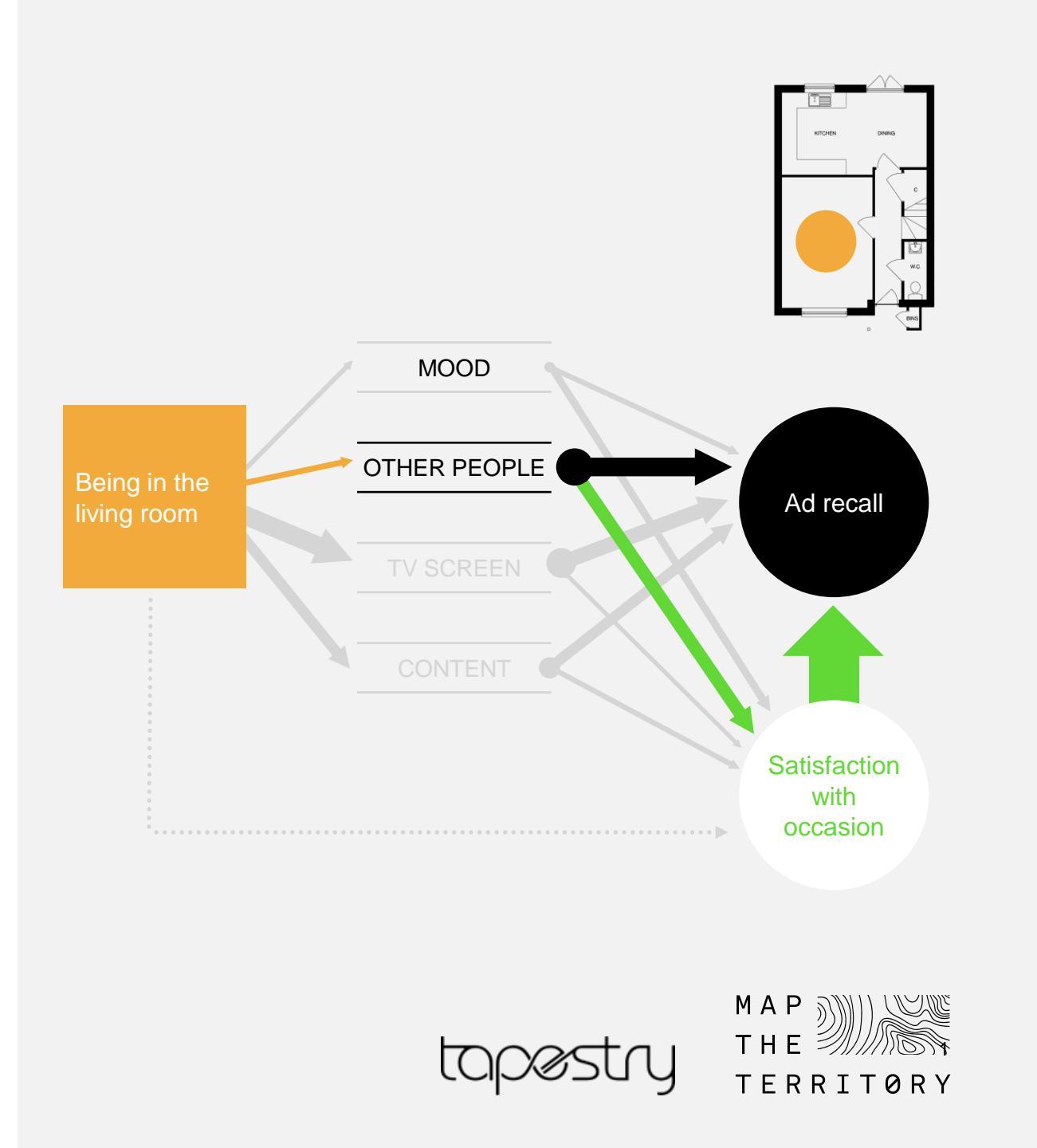


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In the living room  
we are more likely  
to **be with others**,  
in a more democratic  
way



# Being with others has a marked impact on ad recall



Ad recall  
increases by

↗ 23%

when watching  
with others vs. alone

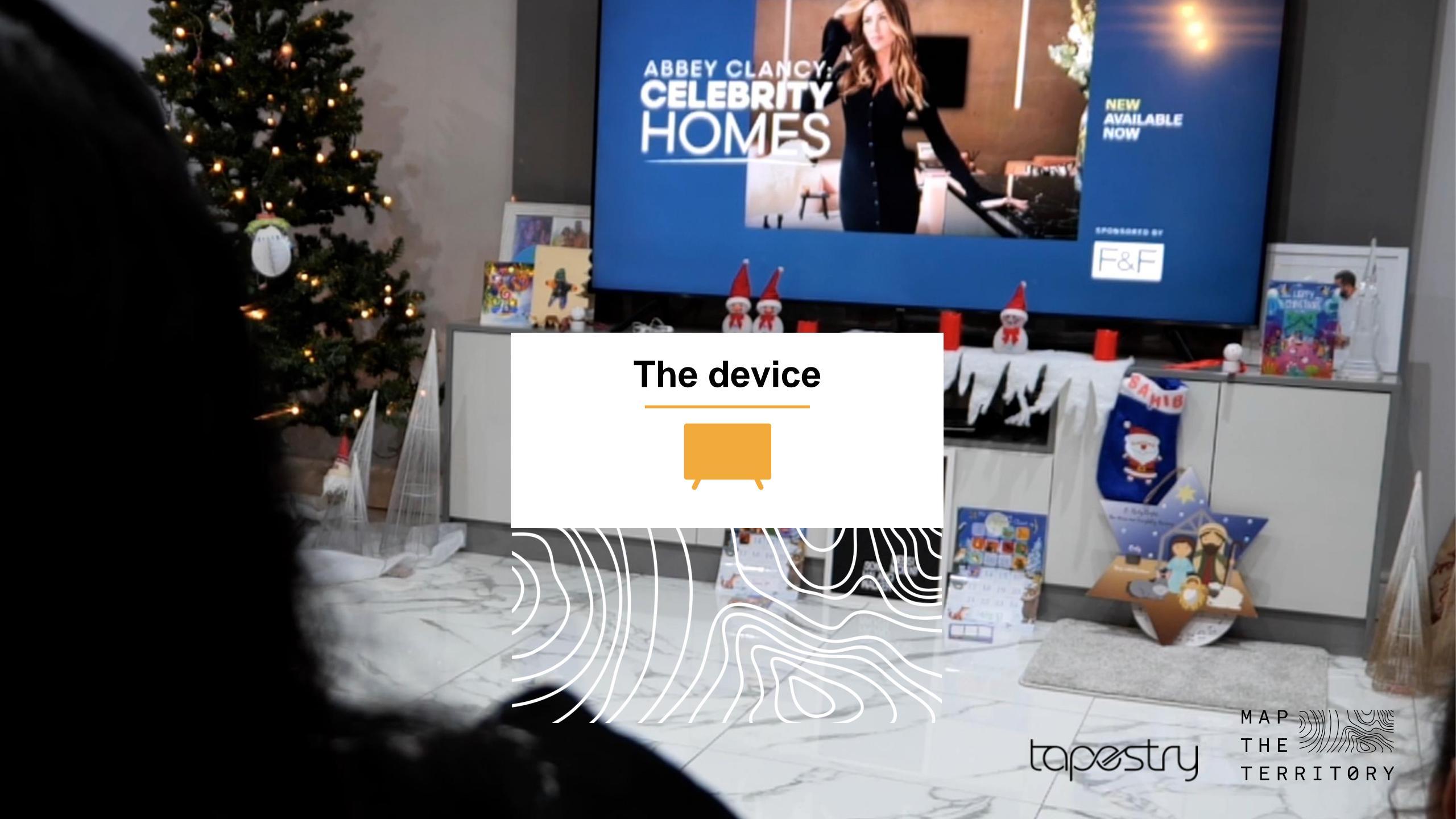
Source: Context Effects, Map the Territory & Tapestry Research, 2024

A18. Do you remember seeing any advertising when you watched [OCCASION]? A10. Who, if anyone, were you watching [OCCASION] with?

Base: 4,005 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

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## The device

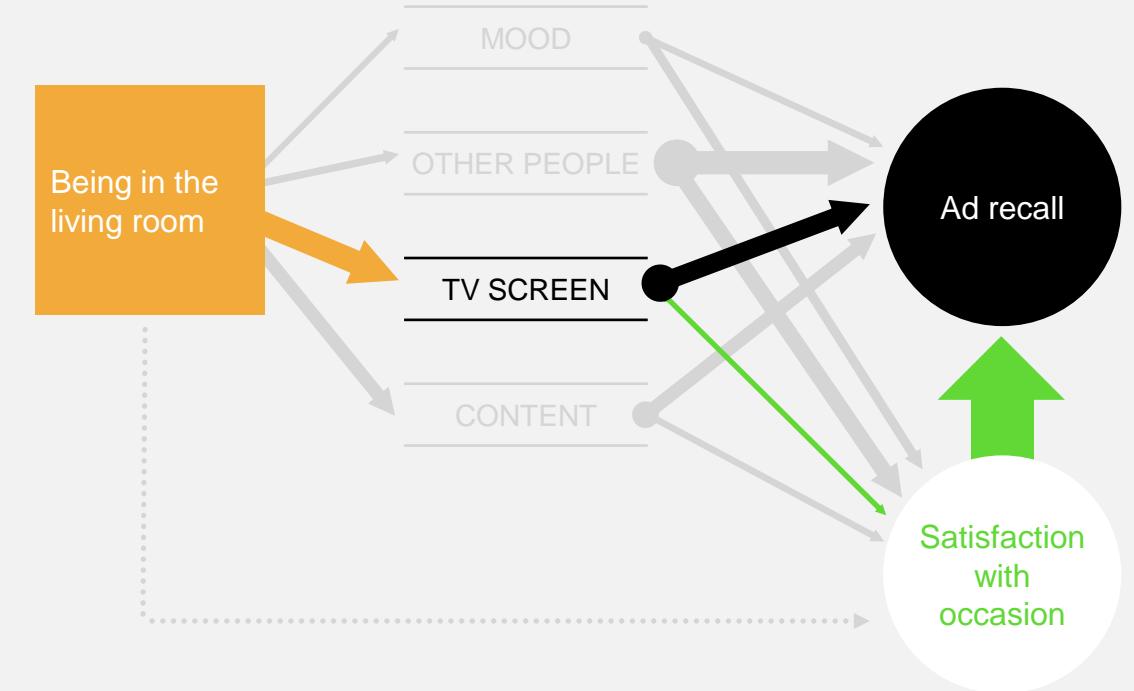
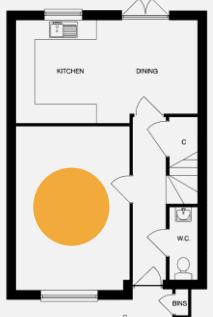


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In the living room  
we're more likely to be  
watching on a TV  
screen



# The TV screen drives highest ad recall of all devices

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TV screen

Ad recall

+34%

vs. computer

+60%

vs. tablet / smartphone

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A18. Do you remember seeing any advertising when you watched [OCCASION]? A7a. On which device did you watch [OCCASION]?

Base: 4,005 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

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# And don't neglect the audio

Having a soundbar in your  
TV set viewing occasion

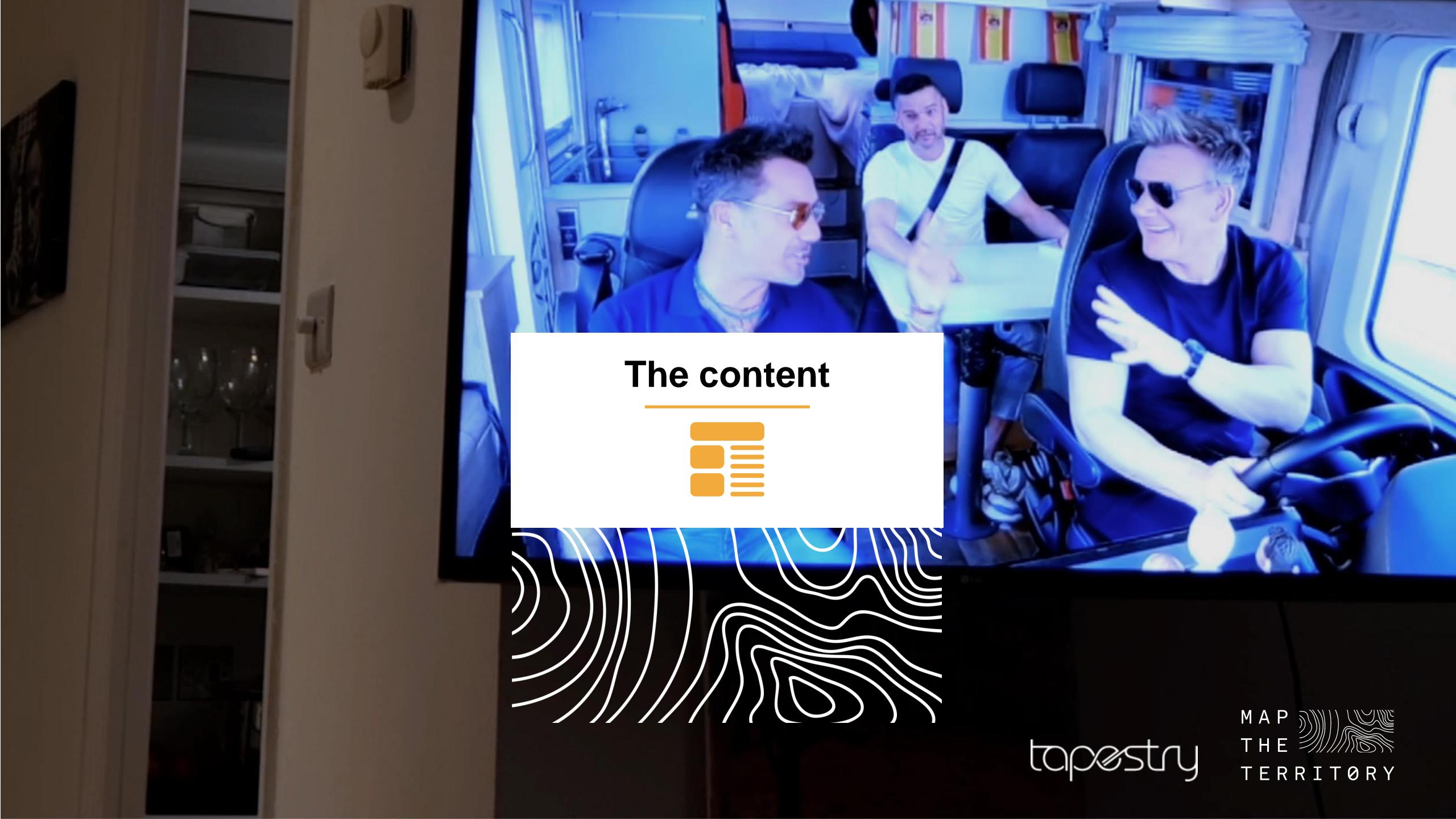
increases  
ad recall by

**+20%**

With soundbar  
vs. without

Source: Context Effects, Map the Territory & Tapestry Research, 2024  
A18. Do you remember seeing any advertising when you watched [OCCASION]? A7b. Did the TV on which you were watching have a 'sound bar' to enhance the sound quality?  
Base: 2,927 viewing occasions with ads watched via TV the previous day. Sample matched to Barb.

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SIDDIQI

A photograph of three men in a small boat or cabin. One man in a blue shirt and glasses is in the foreground, smiling. Another man in a white t-shirt and a hat is standing behind him. A third man in a dark shirt and sunglasses is seated in the background, gesturing with his hands.

## The content

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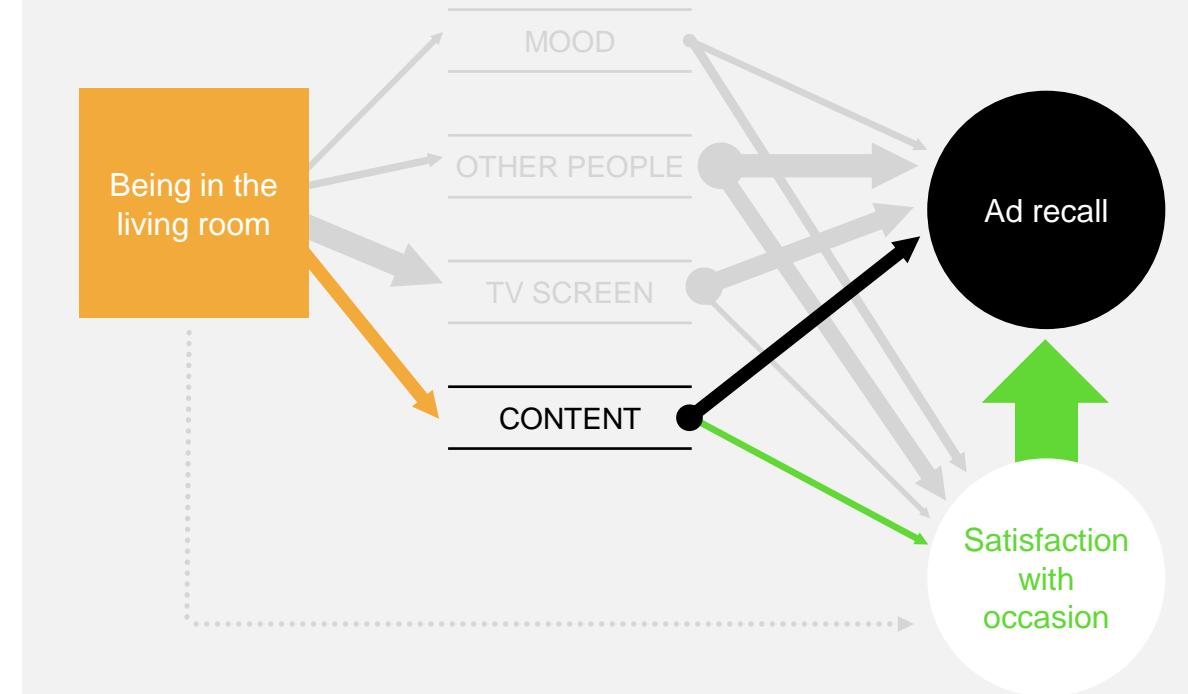
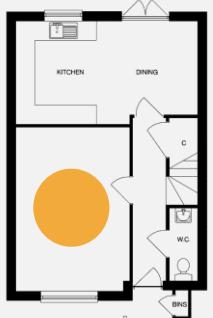


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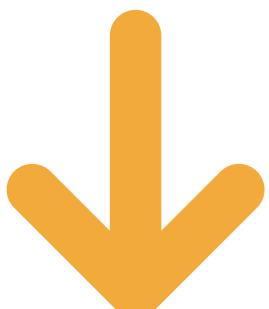
The living room  
encourages us to  
watch professional  
content





scroll

hole



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# Content matters for ad recall:

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Ad recall is much higher from occasions **involving professional content** vs. non-professional content

**+60%**

higher ad recall for professional content vs. non-professional content

**+44%**

Seeing an ad within professional content makes it feel more trustworthy

**+39%**

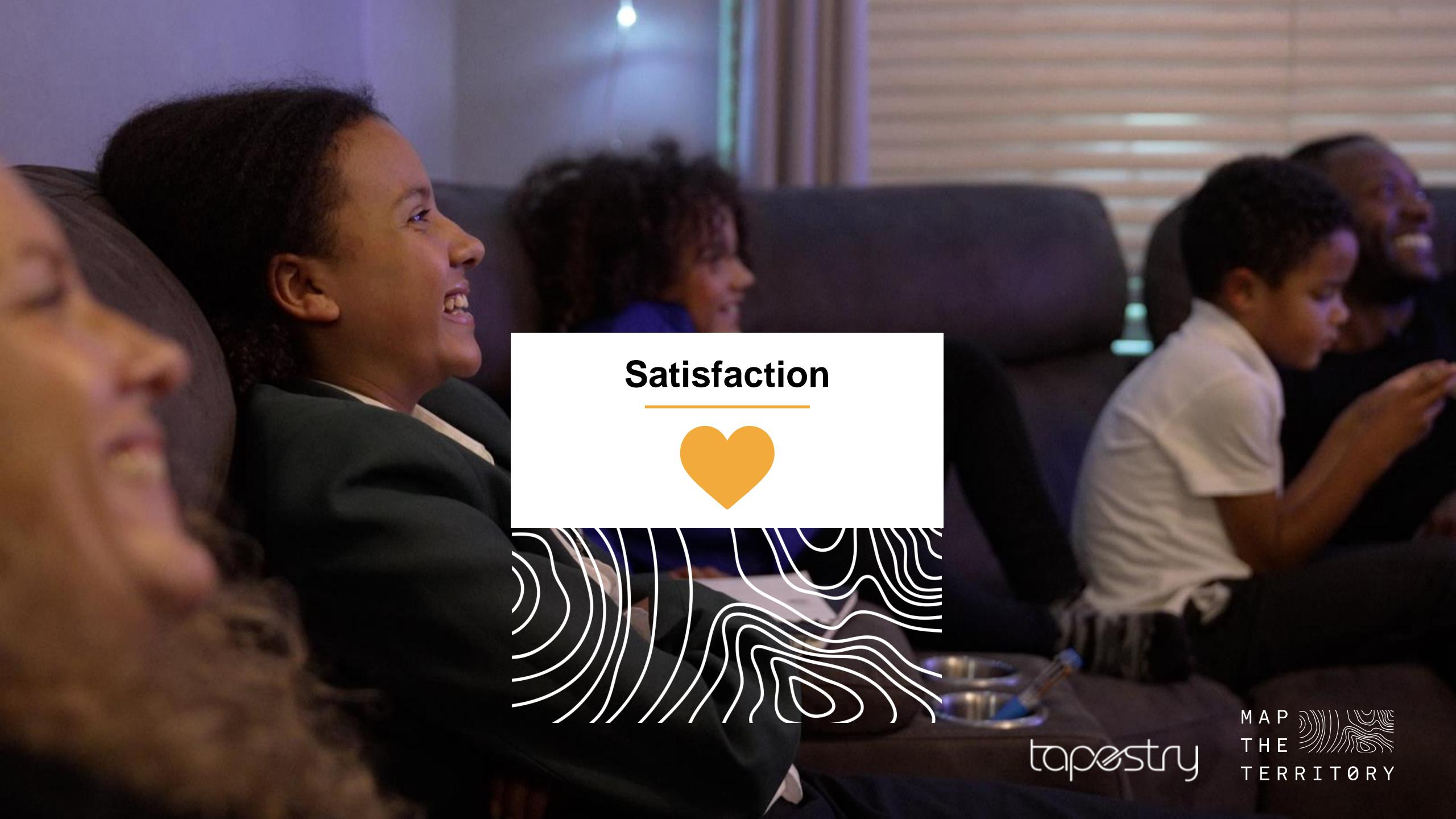
More entertaining

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A18. Do you remember seeing any advertising when you watched [OCCASION]? Base: 2,927 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

A23. How strongly do you agree or disagree with the following statements when it comes to the ads you saw when you watched [OCCASION]?

Base: 1,950 occasions where ads were recalled (1,499 Professional, 451 Non-professional).

A photograph of a diverse group of people, including children and adults, sitting in rows in what appears to be a theater or auditorium. They are all looking towards the same point off-camera with expressions of enjoyment and engagement.

**Satisfaction**

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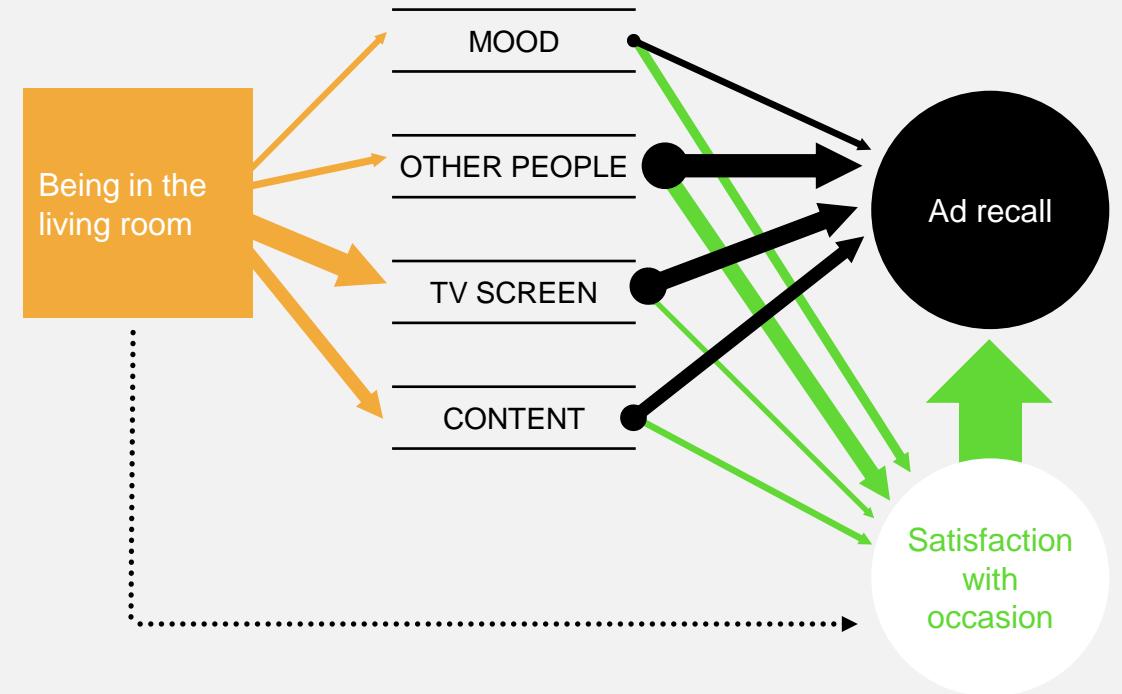
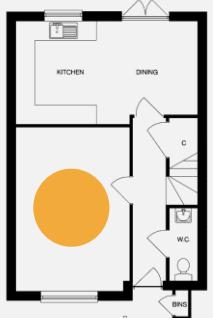
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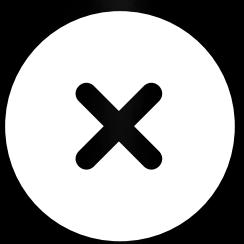


Watching content  
in the living room is  
**more satisfying**  
than other rooms



# Insight

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People don't gather  
to watch TV...



...they watch TV  
to gather

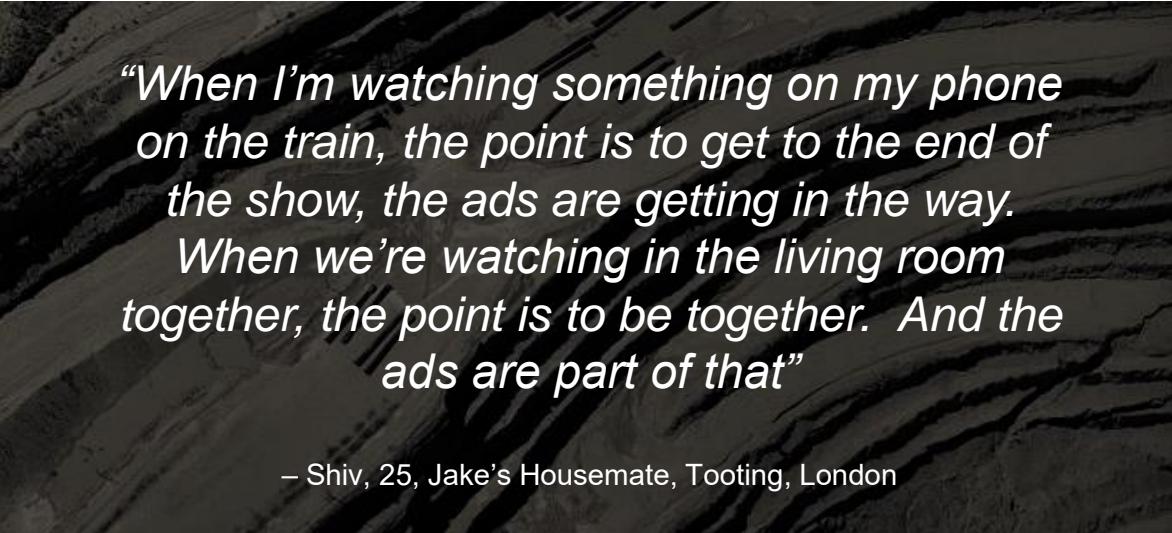


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# In this environment ads are all part of the experience

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*"When I'm watching something on my phone on the train, the point is to get to the end of the show, the ads are getting in the way.  
When we're watching in the living room together, the point is to be together. And the ads are part of that"*

– Shiv, 25, Jake's Housemate, Tooting, London

People find the ads

**-80%**

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**less intrusive in professional vs. non-pro content**

People are

**2X**

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**more likely to repeat / mimic the ads (more if watching with kids)**

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A23. How strongly do you agree or disagree with the following statements when it comes to the ads you saw when you watched [OCCASION]?

Base: 1,950 occasions where ads were recalled (1,499 Professional, 451 Non-professional)



This is  
memorable

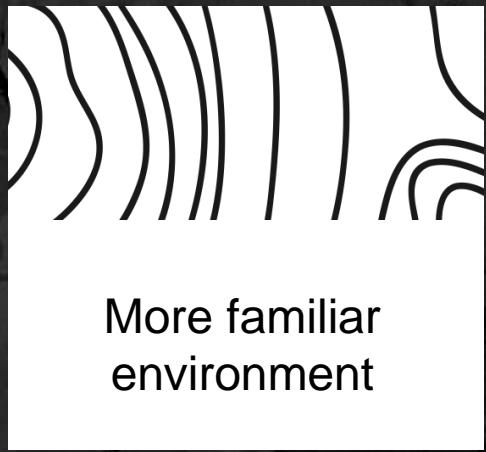
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# How ads get seared into the household's collective memory

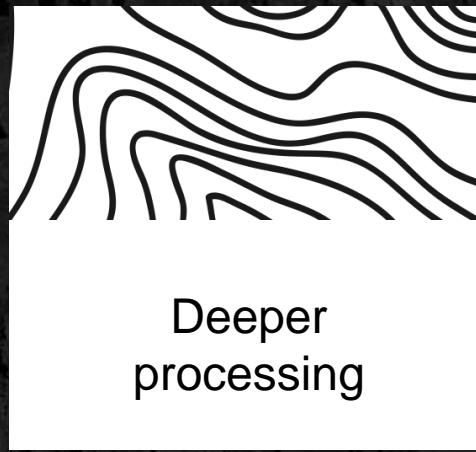
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1



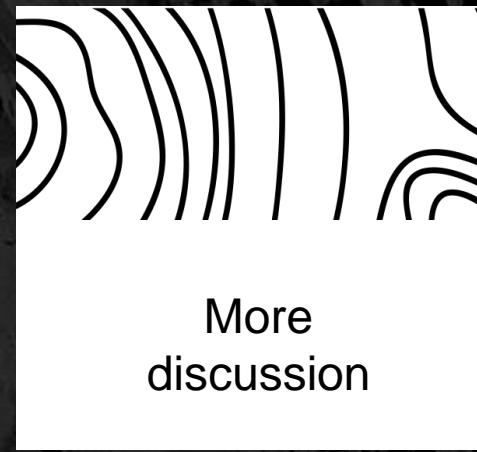
More familiar  
environment

2



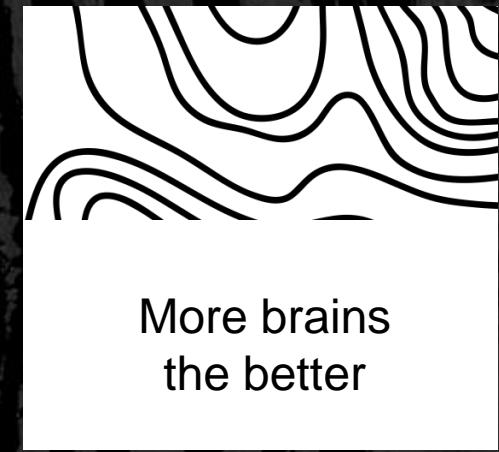
Deeper  
processing

3



More  
discussion

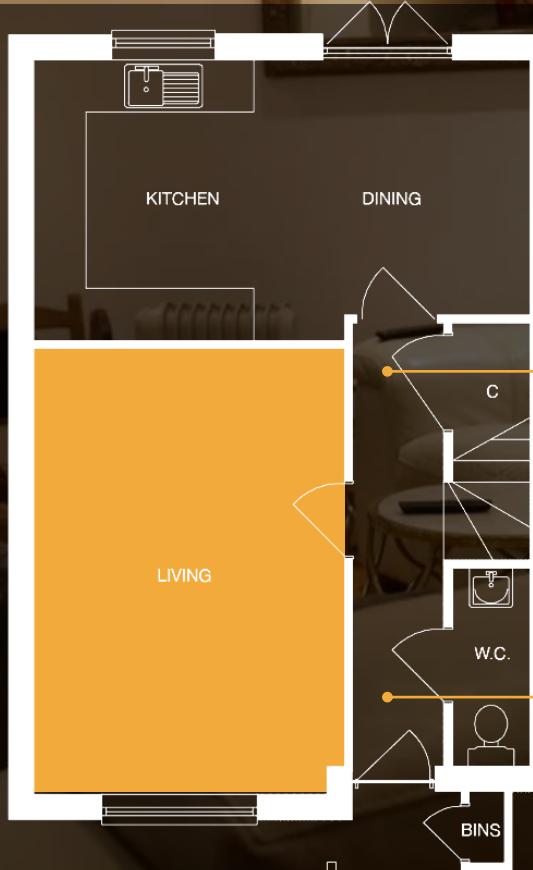
4



More brains  
the better

# TV in the living room is a unique environment

**Technology**  
makes it easier  
than ever to meet  
our personal needs  
– but we're a social  
species



**Professional content on TV in the living room** is a key means through which British households come together and bond

And **advertisers** are very much **welcome** here

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# Recap



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# The key numbers to know

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**6.3x**

More likely to recall ads

The living room is the **most effective room in the home** for advertising

**+23%**

Recall when watching with others

The living room makes us more likely to be **watching with others** in a democratic way, boosting ad recall

**+60%**

Recall watching TV vs. personal device

The living room makes us more likely to be **watching on a TV screen**, boosting ad recall

**+44%**

Higher trust vs. non-professional content

The living room makes us more likely to be **watching professional content** boosting ad recall and trust

**-80%**

Less intrusive vs. non-professional content

Combined this all makes us **satisfied**, boosting ad recall and creating an environment where ads are more welcome

Source: Context Effects, Map the Territory & Tapestry Research, 2024

A18. Do you remember seeing any advertising when you watched [OCCASION]? Base: 2,927 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.

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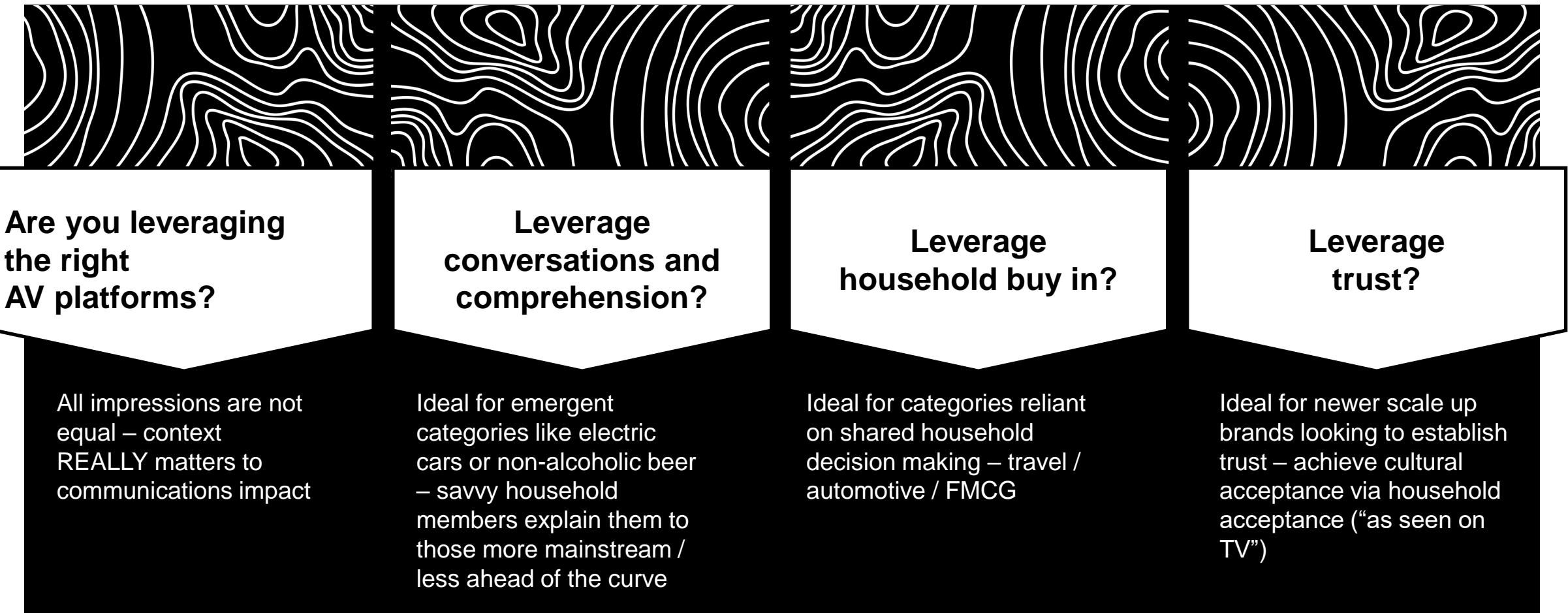
# Provocations for advertisers

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# Provocations for media planners

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# Provocations for creatives

## Write for WE not ME

The living room is a shared environment – address the collective

## Leverage the more playful household dynamic

It's less hierarchical here:

- Ads that catalyse / provoke debate and discussion between household members – e.g. Sainsbury's Bake Off 'Is it cake?'
- Ads that allow other householders to challenge the status quo

## Bring the outside world in

TV gives households a chance to understand what householders think about things beyond the home – highlight emergent trends / cultural practices to get them talking

## Leverage the cinematic / immersive nature of TV ads

Sound is particularly powerful to get the household group's attention

A woman with blonde hair tied back is sitting on a dark couch, looking down at a small, curly-haired dog (possibly a cockapoo) resting on her lap. She is wearing a white t-shirt. The background shows a wooden door and a light-colored wall.

Thanks for  
listening

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