



THE MIND OF THE VIEWER

Nielsen Consumer Neuroscience

September 8, 2016



NEUROMETRICS COMMITTEE

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SETTING UP THE RESEARCH QUESTION

SITUATION:

Nielsen People Meter households log in and out of meters attached to their televisions to let Nielsen know when they are watching or listening to TV.

Current definitions of engagement include:

“Watching in Room”



Audible Exposure “In-Room”



“Listening or Watching”



where being in the room is not required.

Results from research will provide insight into how the proliferation of multi-platform devices impact what the future definition of engagement might be.

WHY FOCUS ON THE MIND OF THE VIEWER?

HYPOTHESIS STATEMENT:

As more households include multi-platform devices as part of their regular viewing behavior, the industry definition of engagement may need to expand to accommodate additional behaviors beyond the current *“watching”* and *“listening.”*

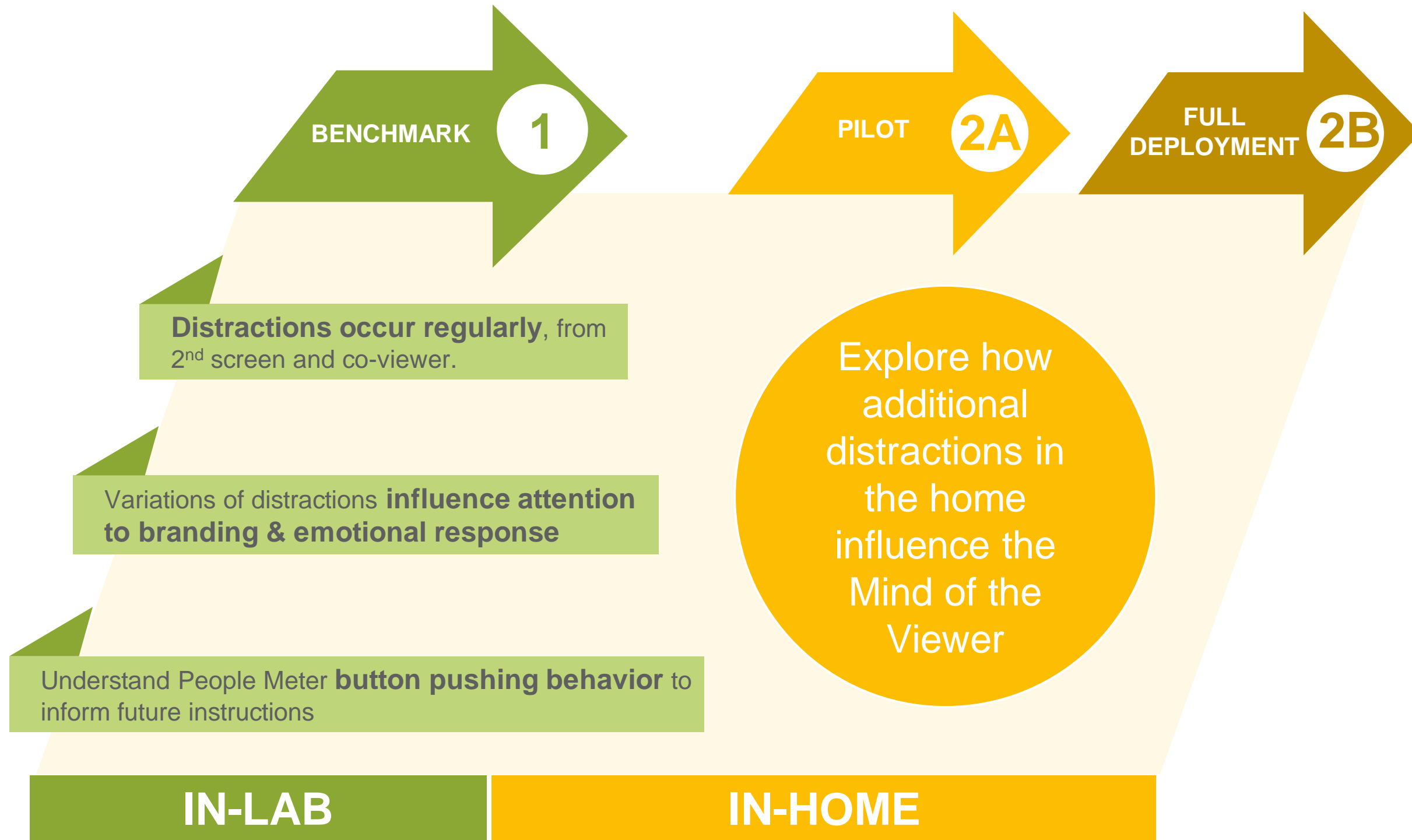
BENEFITS TO THE INDUSTRY:

- Improve understanding of how multi-platform device use in a household may increase opportunities for exposure to content.
- Help inform the development of new technologies & metrics used to capture viewing behavior.

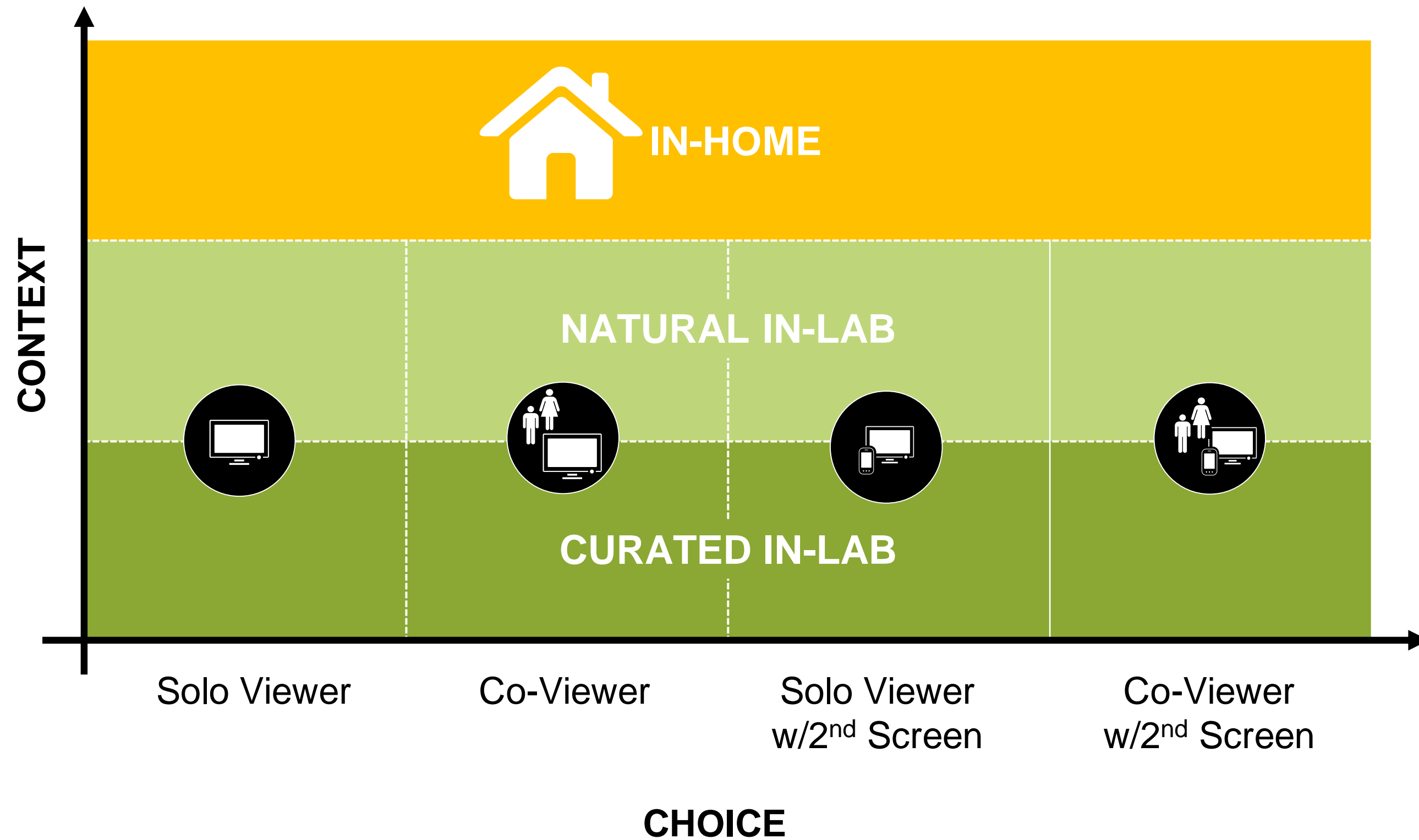


MULTI-PHASE STUDY: FOCUS ON IN-LAB



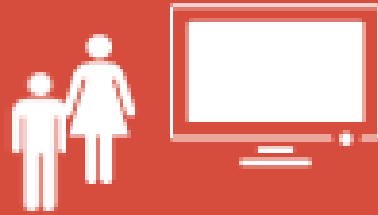
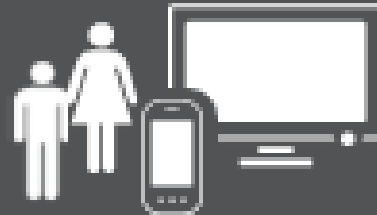

In-lab insights feed framework to dive deeper in-home



SPECTRUM OF CHOICE



SUMMARY OF IN-LAB EXPERIENCE

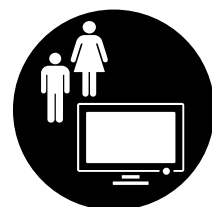
				
CELL 1	CELL 2	CELL 3	CELL 4	CELL 5
Solo viewer without 2 nd screen	Solo viewer with 2 nd screen	Co-viewing pairs without 2 nd screen	Co-viewing pairs with 2 nd screen	Solo viewer with 2 nd screen People Meter Usage
N=40	N=40	N=60 (N=30 PAIRS)	N=62 (N=31 PAIRS)	N=14

UNDERSTANDING THE MIND OF THE TV VIEWER: MULTIPLE METRICS INFORM HOLISTIC INSIGHTS



OVERVIEW OF PRESENTATION

1 IMPACT OF CO-VIEWING



2 IMPACT OF USING 2ND SCREEN



3 PEOPLE METER BEHAVIOR



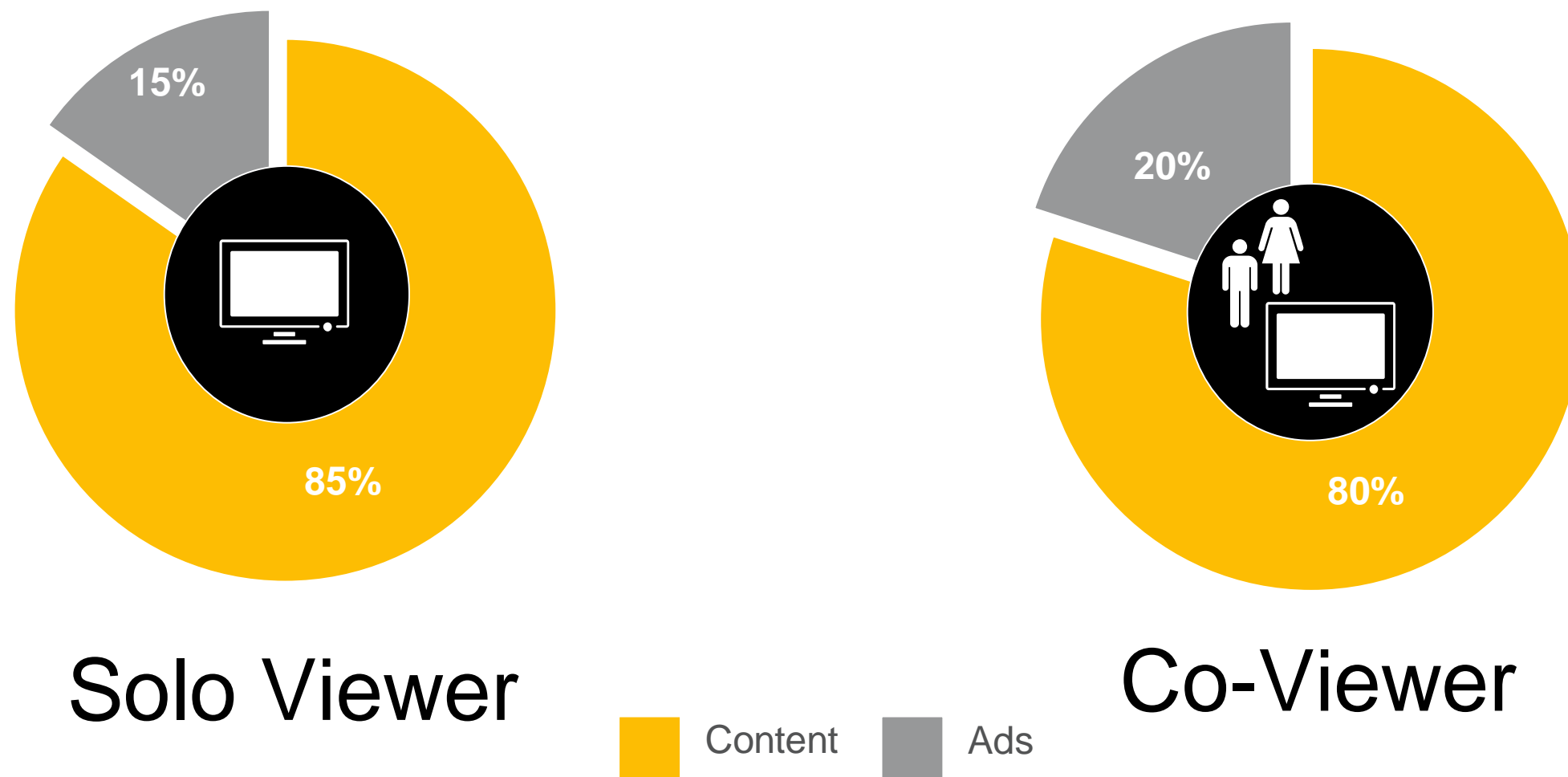


WHAT IS THE IMPACT OF CO-VIEWING WHEN WATCHING TV?

PEOPLE'S ATTENTION IS PRIMARILY FOCUSED ON TV CONTENT WHILE WATCHING TELEVISION

Ads Benefit from Longer Tune In Among Co-Viewers

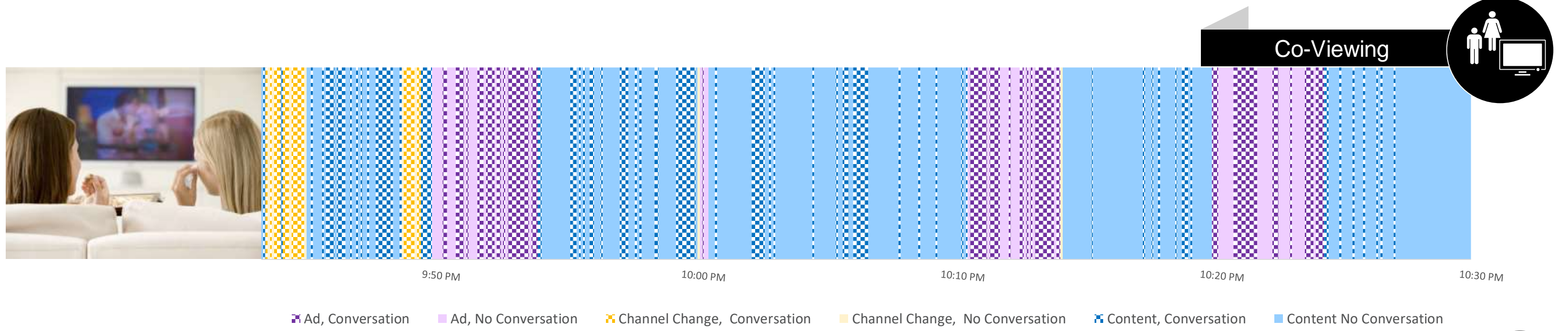
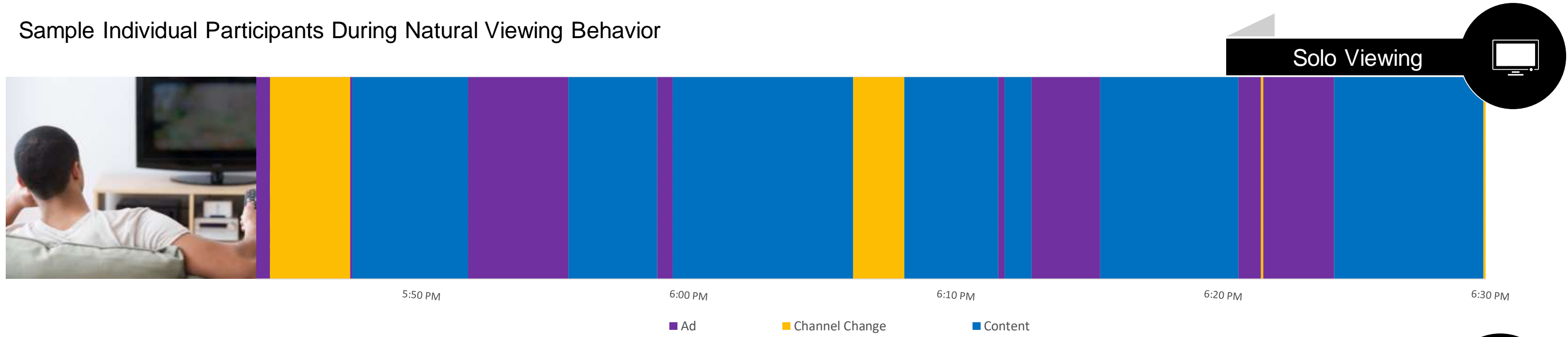
Attention to TV: Time Spent on Ads vs. Content



Average Total Time in Natural Viewing Experience (mm:ss): 42:57

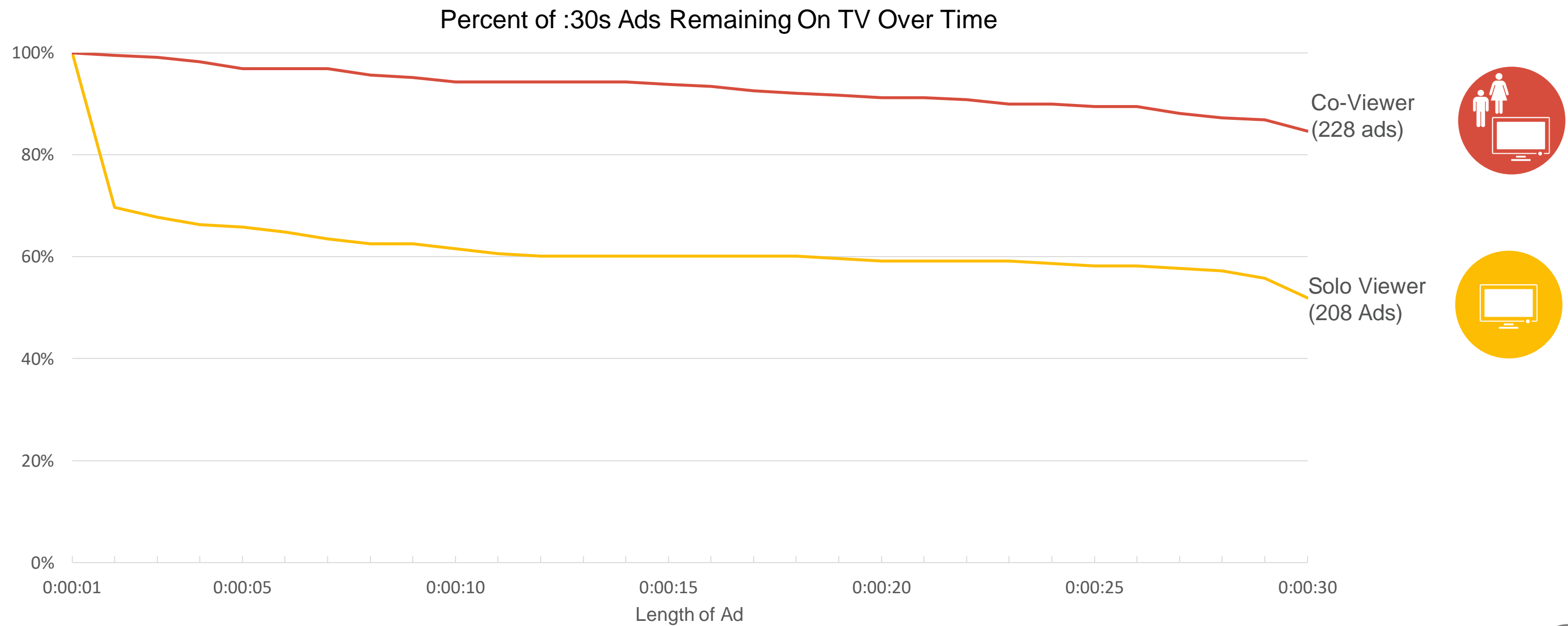
BEHAVIOR WHILE WATCHING TV IS CONSTANTLY CHANGING AND MORE COMPLEX WHEN WITH A CO-VIEWER

Sample Individual Participants During Natural Viewing Behavior



FOR 30% OF ADS, SOLO VIEWERS WILL CHANGE THE CHANNEL WITHIN THE FIRST THREE SECONDS

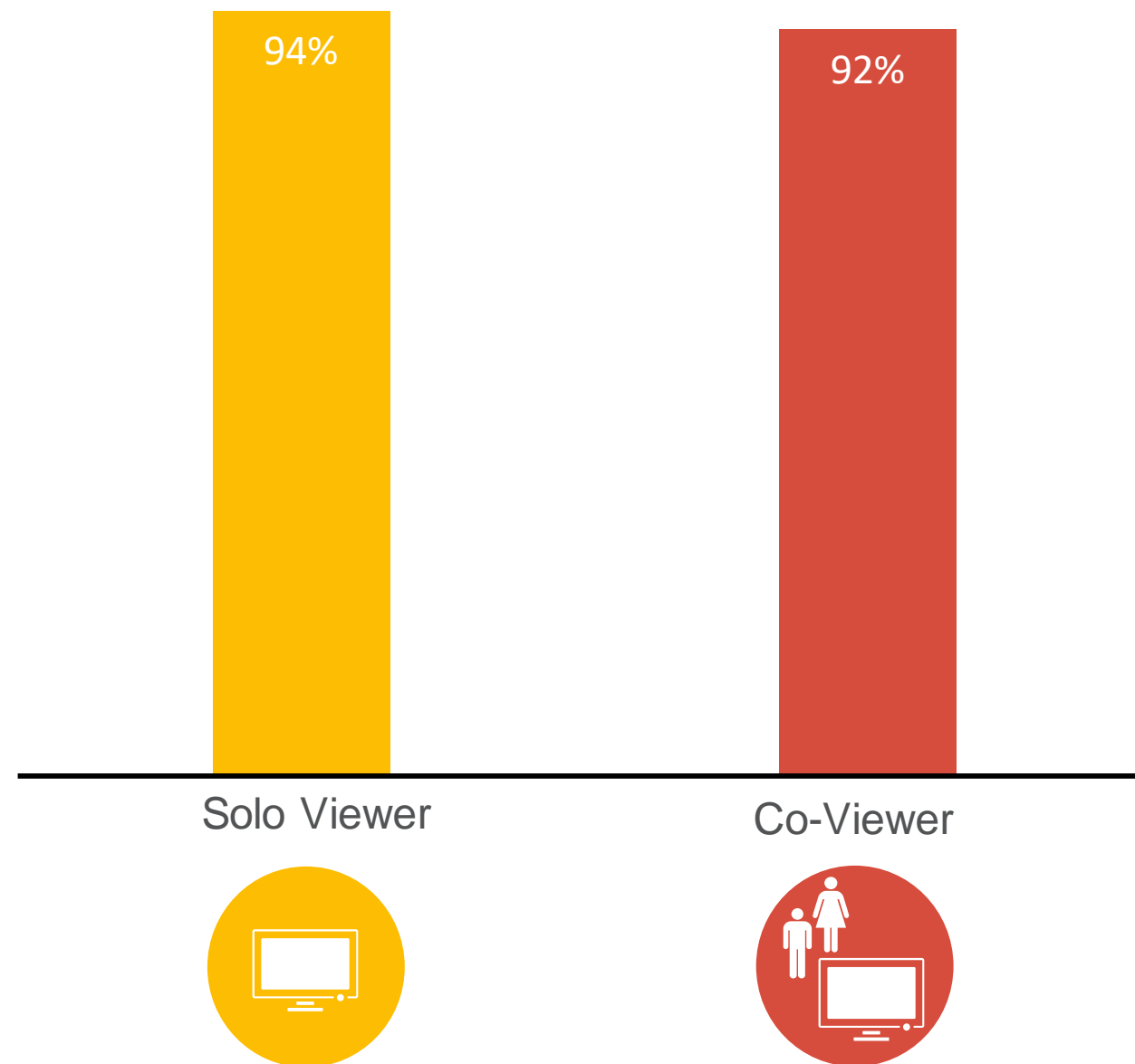
Co-Viewers Less Likely to Change Channel Due to Presence of Another Person



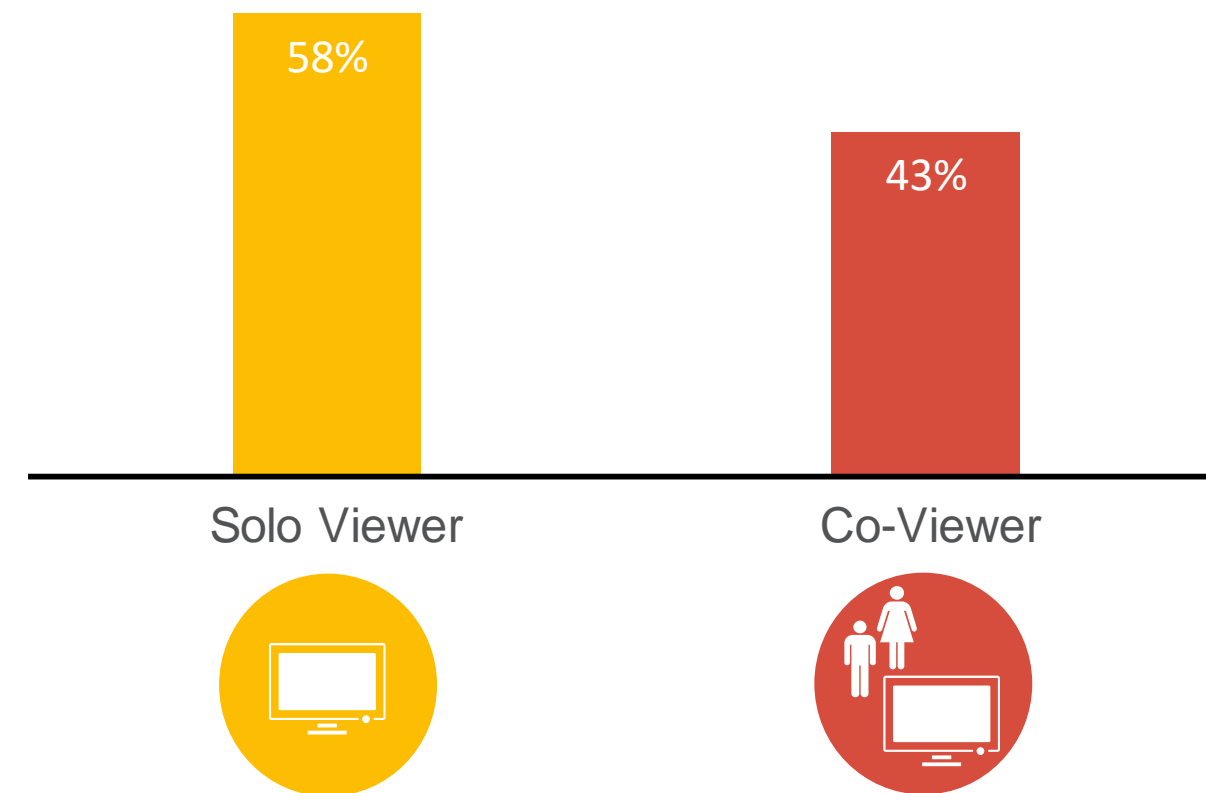
CO-VIEWERS & SOLO VIEWERS EXHIBIT SIMILAR PATTERNS OF VISUAL ATTENTION TO ADVERTISING

Consistent Drop in Visual Attention During Advertising

% Audience to Fixate on Ad at Least Once

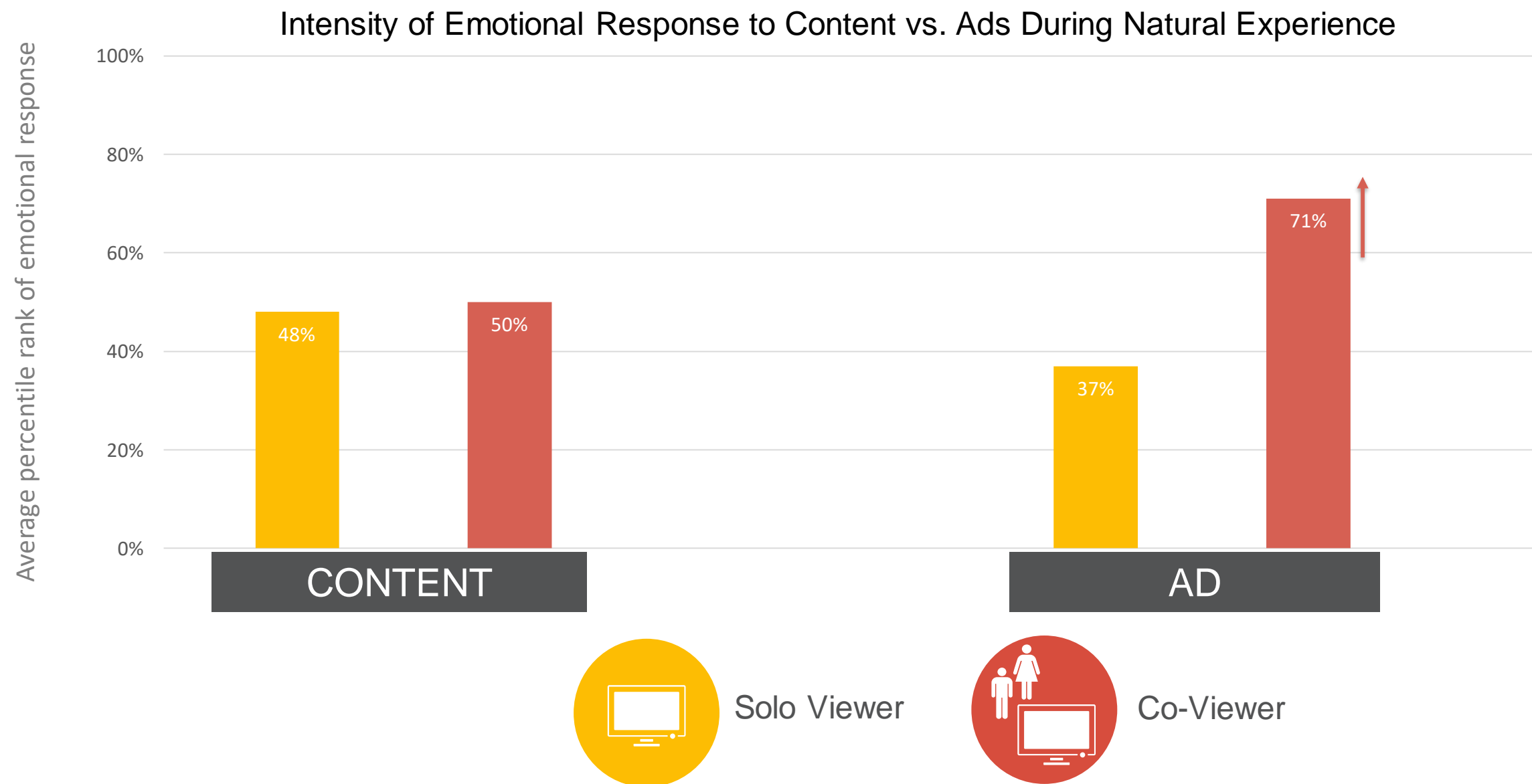


% Time Spent in Fixation on Ad



FOR CO-VIEWERS, EMOTIONAL RESPONSE FOR ADS IS IMPACTED BY CONVERSATION

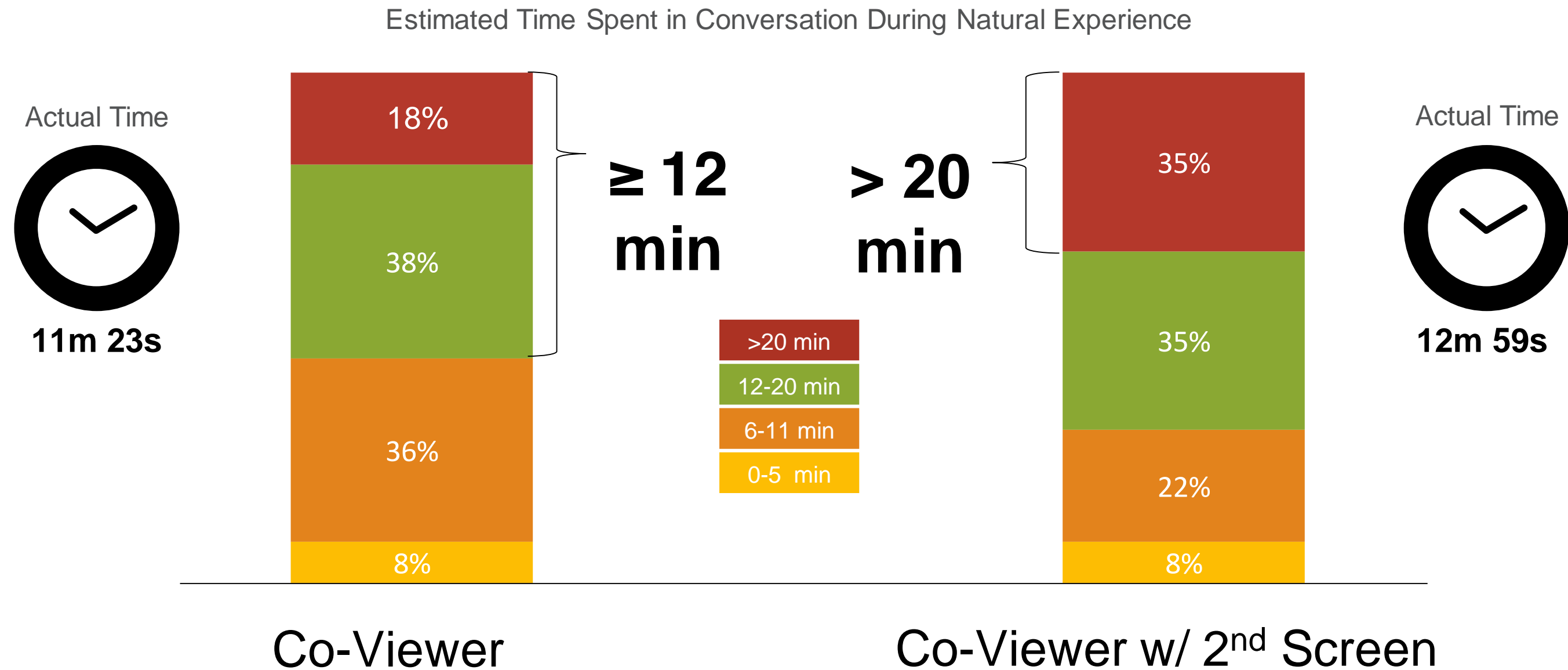
Among Solo Viewers, Content Stimulates Greater Response than Ads



INTENSITY: Height of "Peak" response captured across all ad exposure vs. content exposure. Amplitude refers to peak of emotional arousal.

CO-VIEWERS CONSISTENTLY OVERESTIMATE TIME IN CONVERSATION

However, Presence of 2nd Screen Does Not Reduce Time Spent in Conversation

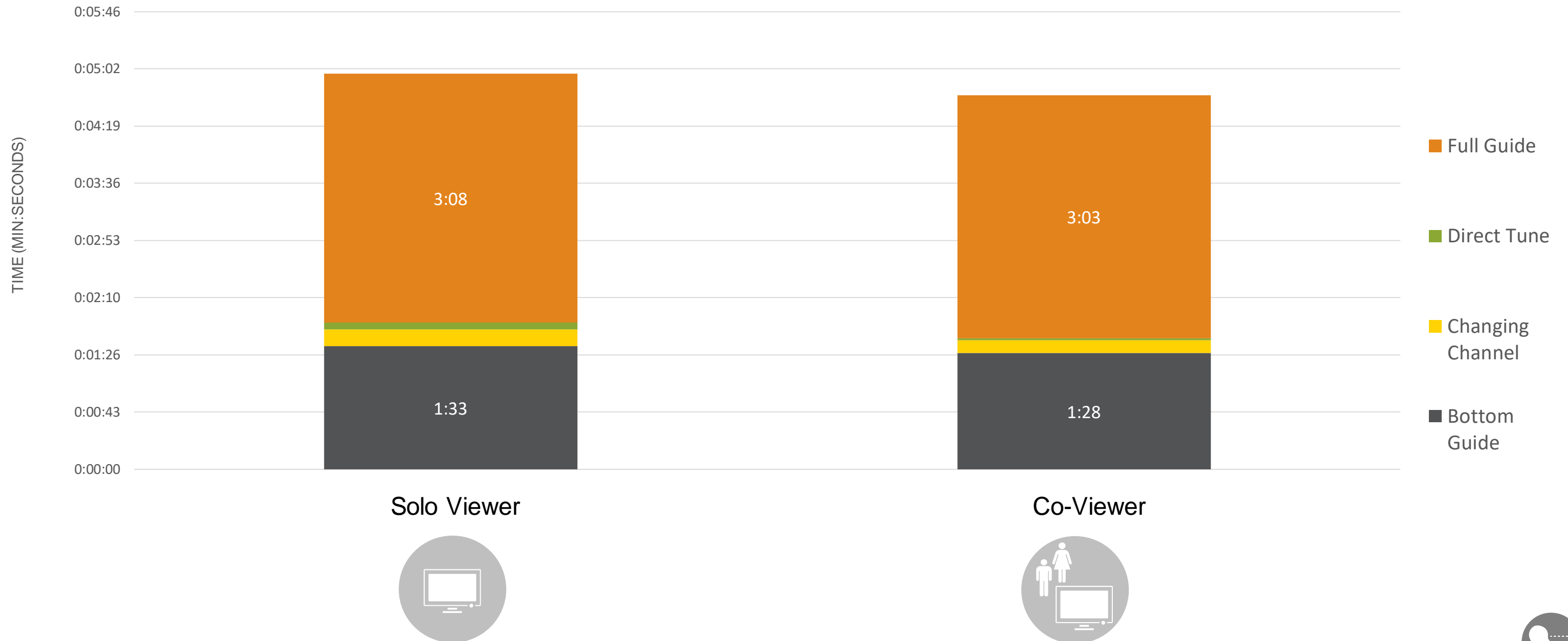


Q: What is your best estimate for the amount of time you spent in conversation with your viewing partner during tonight's free choice experience?

USE OF FULL GUIDES ARE A PREFERRED WAY TO ACCESS CONTENT BUT MAY BE A DISTRACTION

Use of Guides Does Not Eliminate Show Content Playing in a PIP Window

Average Time Spent Searching for Content



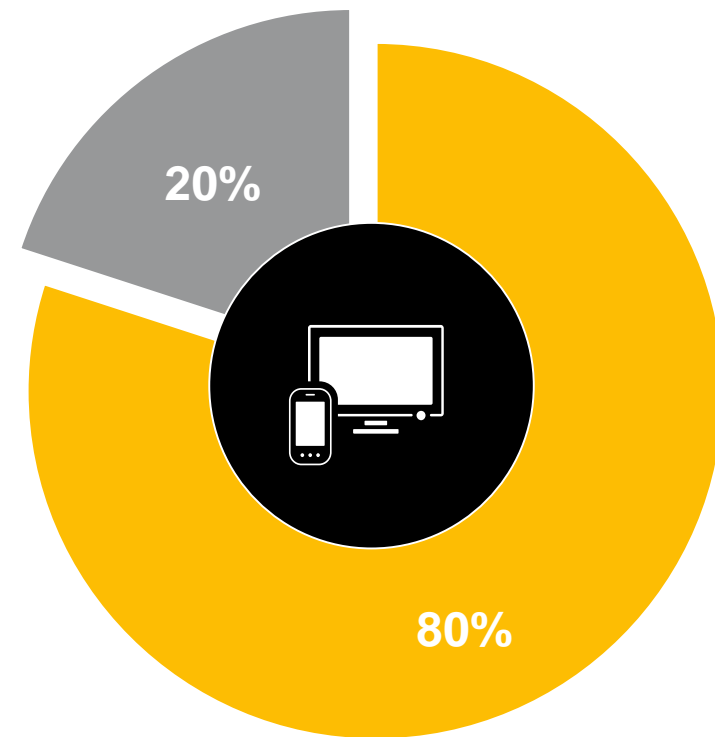


WHAT IS THE IMPACT OF 2nd SCREEN WHEN WATCHING TV?

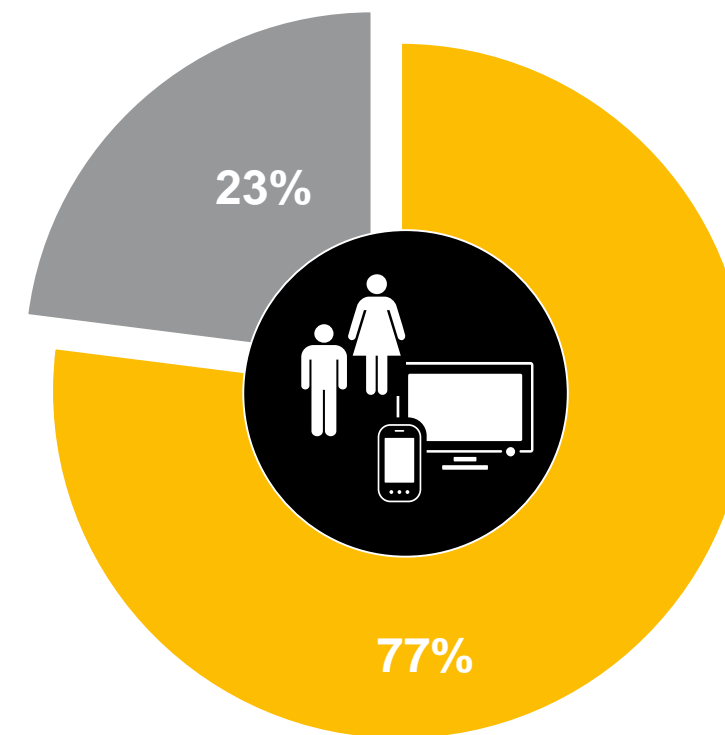
2ND SCREEN USERS EXHIBIT SIMILAR PATTERNS OF BEHAVIOR WITH ADS & CONTENT

Co-Viewers Remain Tuned in to Ads for Slightly Longer than Solo Viewers

Attention to TV: Time Spent on Ads vs. Content



Solo Viewer w/
2nd Screen



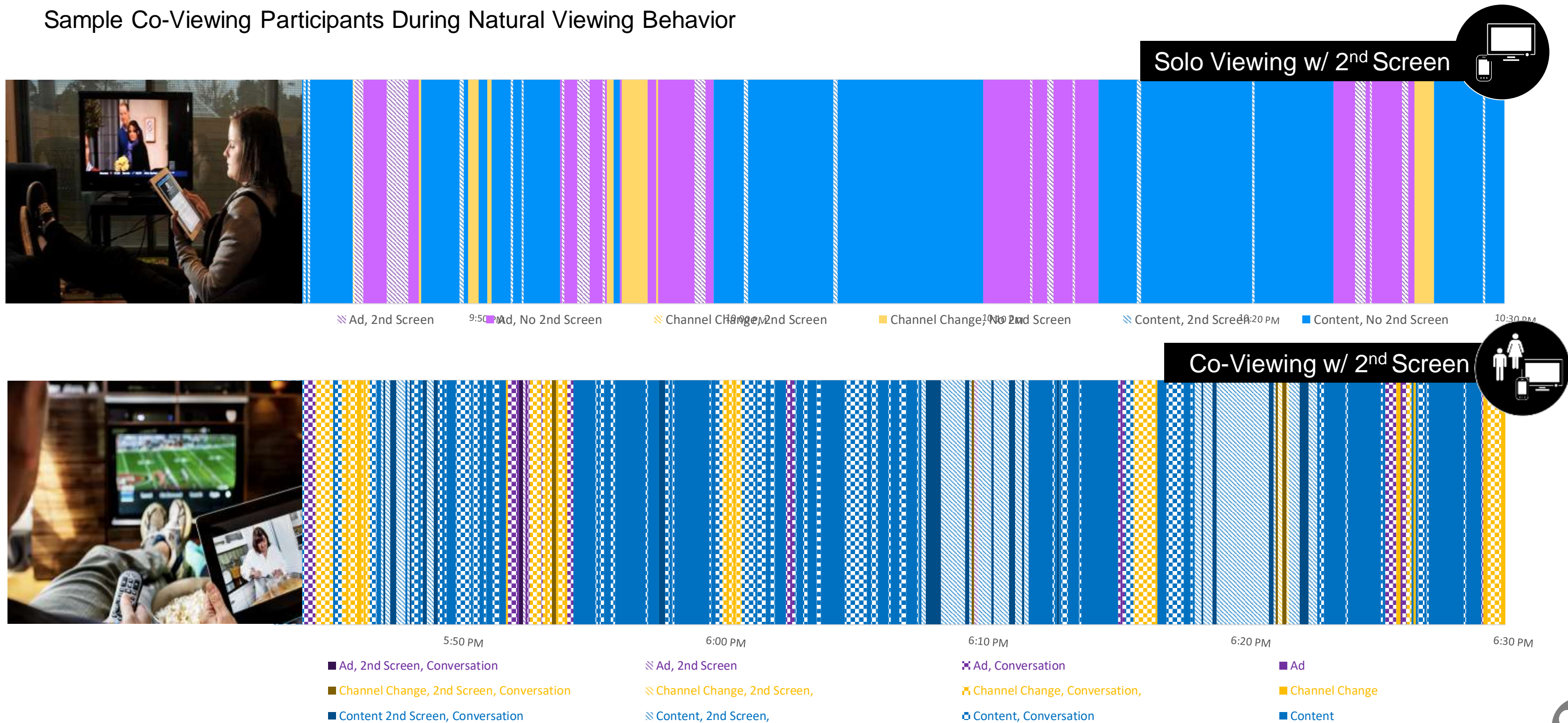
Co-Viewer w/
2nd Screen

Content Ads

Average Total Time in Natural Viewing Experience (mm:ss): 42:57

2ND SCREEN USAGE PUNCTUATES ALL ASPECTS OF WATCHING TV: CONTENT, ADS & CHANNEL CHANGING

Sample Co-Viewing Participants During Natural Viewing Behavior

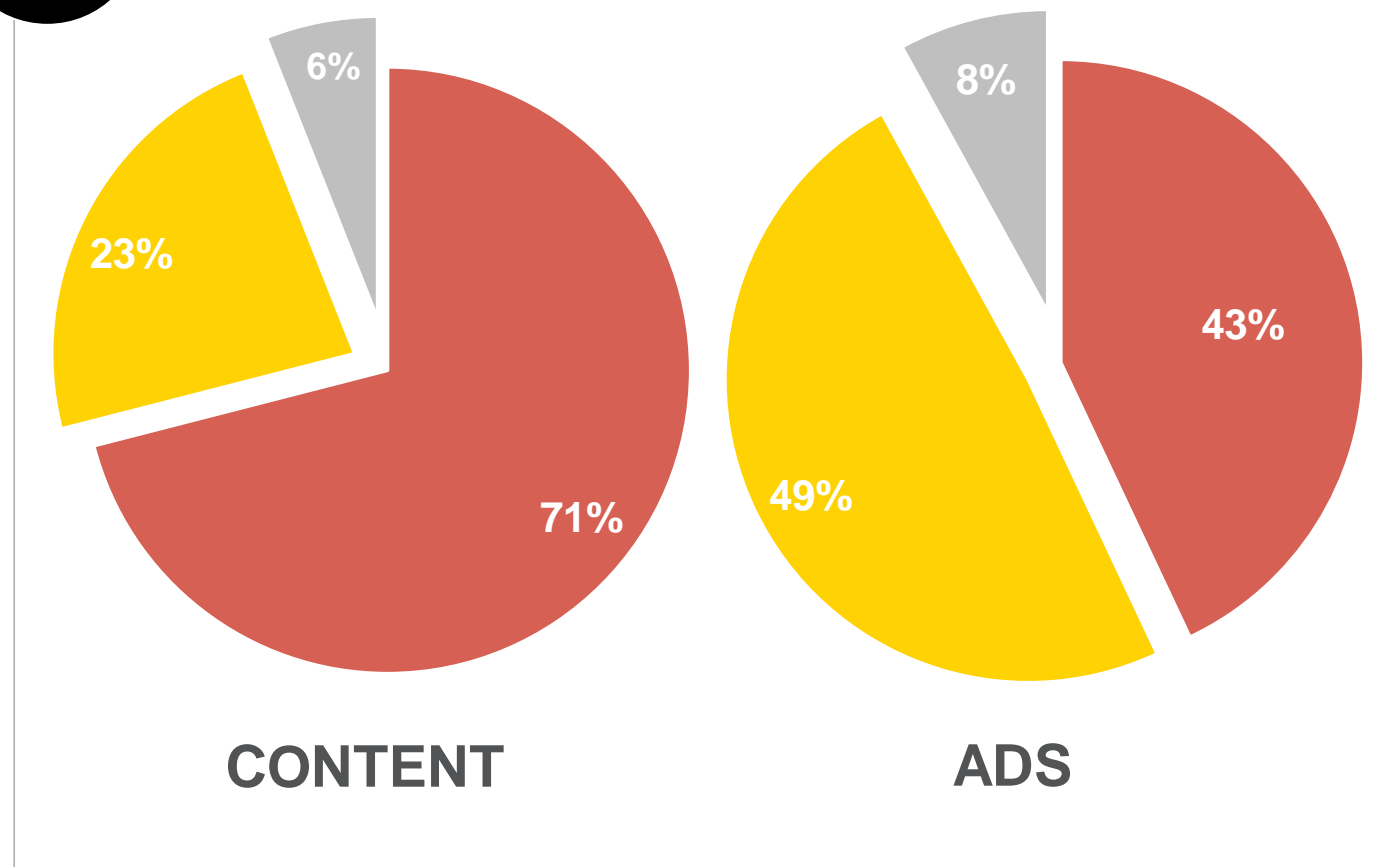


2ND SCREEN USAGE INCREASES AT LEAST 50% DURING ADS FOR BOTH SOLO AND CO-VIEWERS

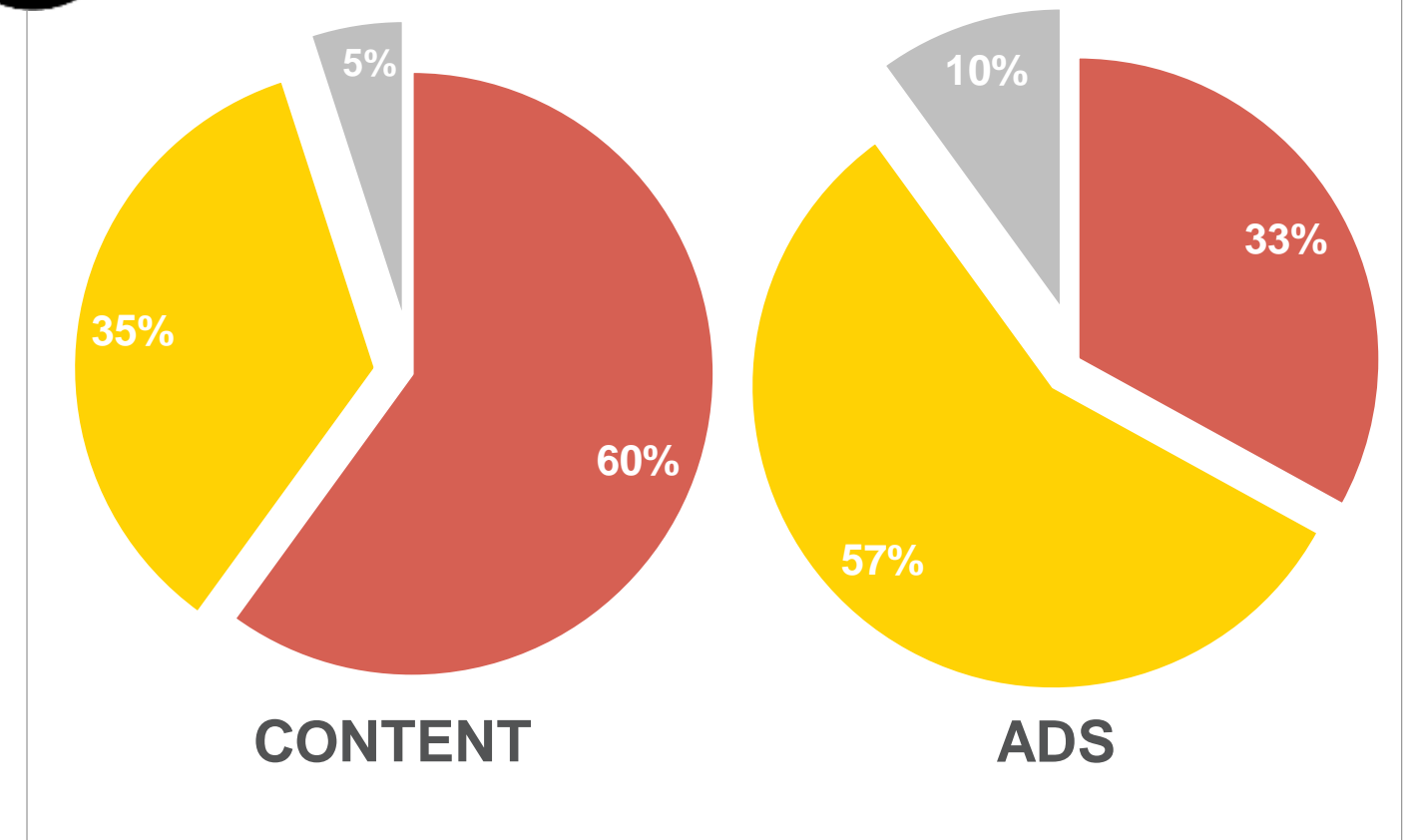
Attention Patterns as % of Total Time



Solo Viewer w/ 2nd Screen



Co-Viewer w/ 2nd Screen



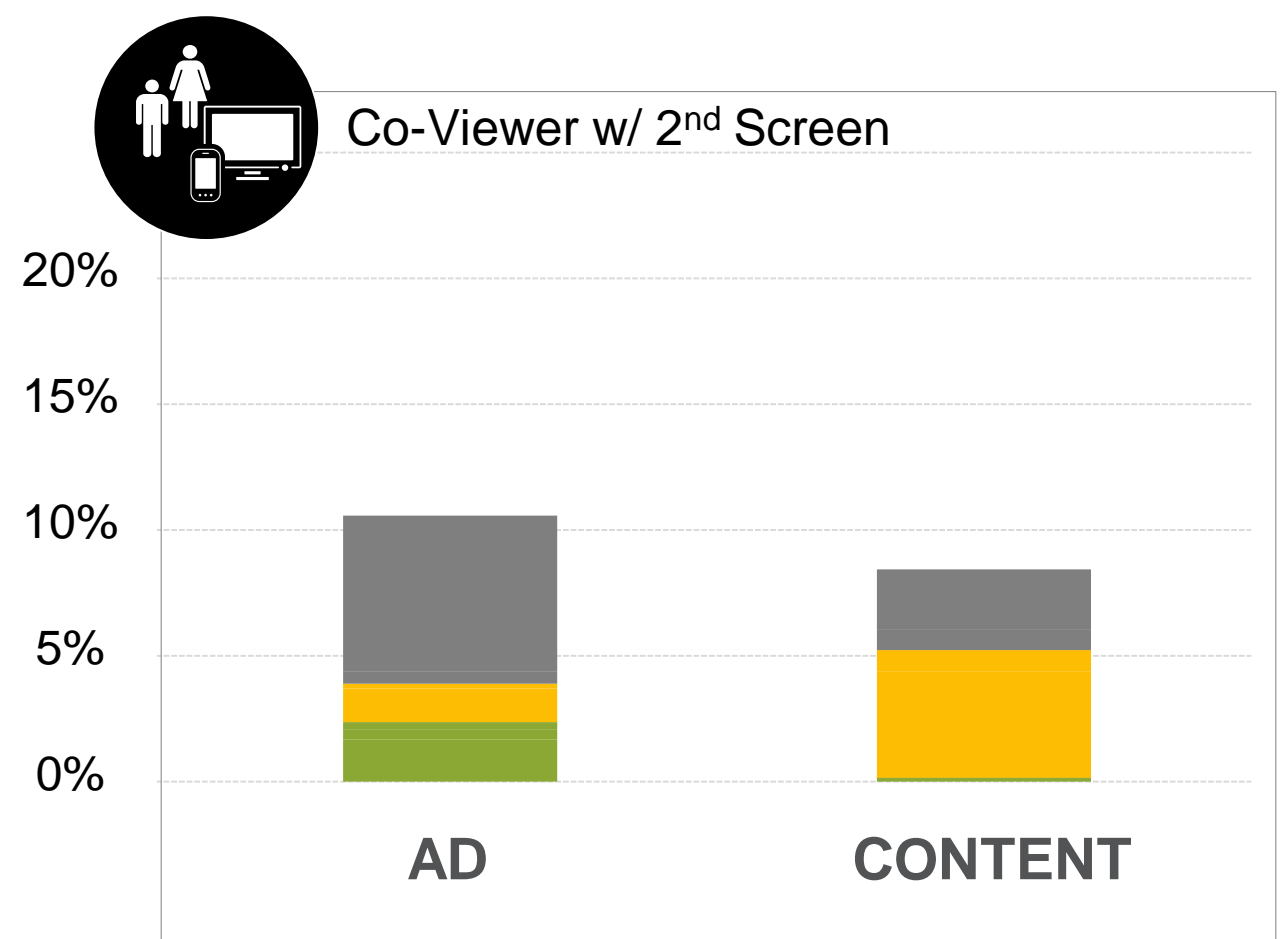
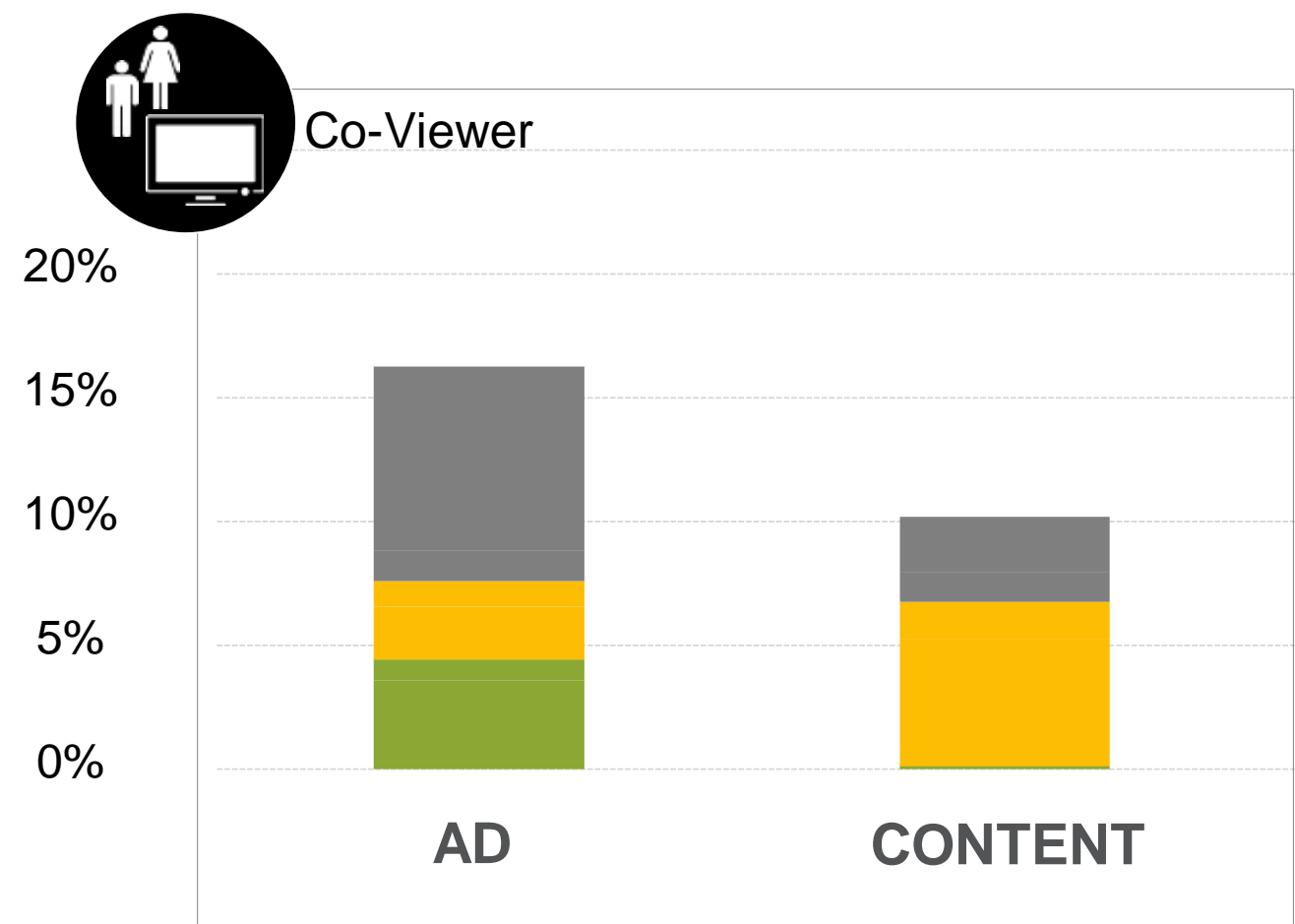
■ Watching TV
 ■ At least one person using 2nd screen
 ■ Other

Note: Average Total Content Exposure 34:39, Average Ad Exposure 8:18



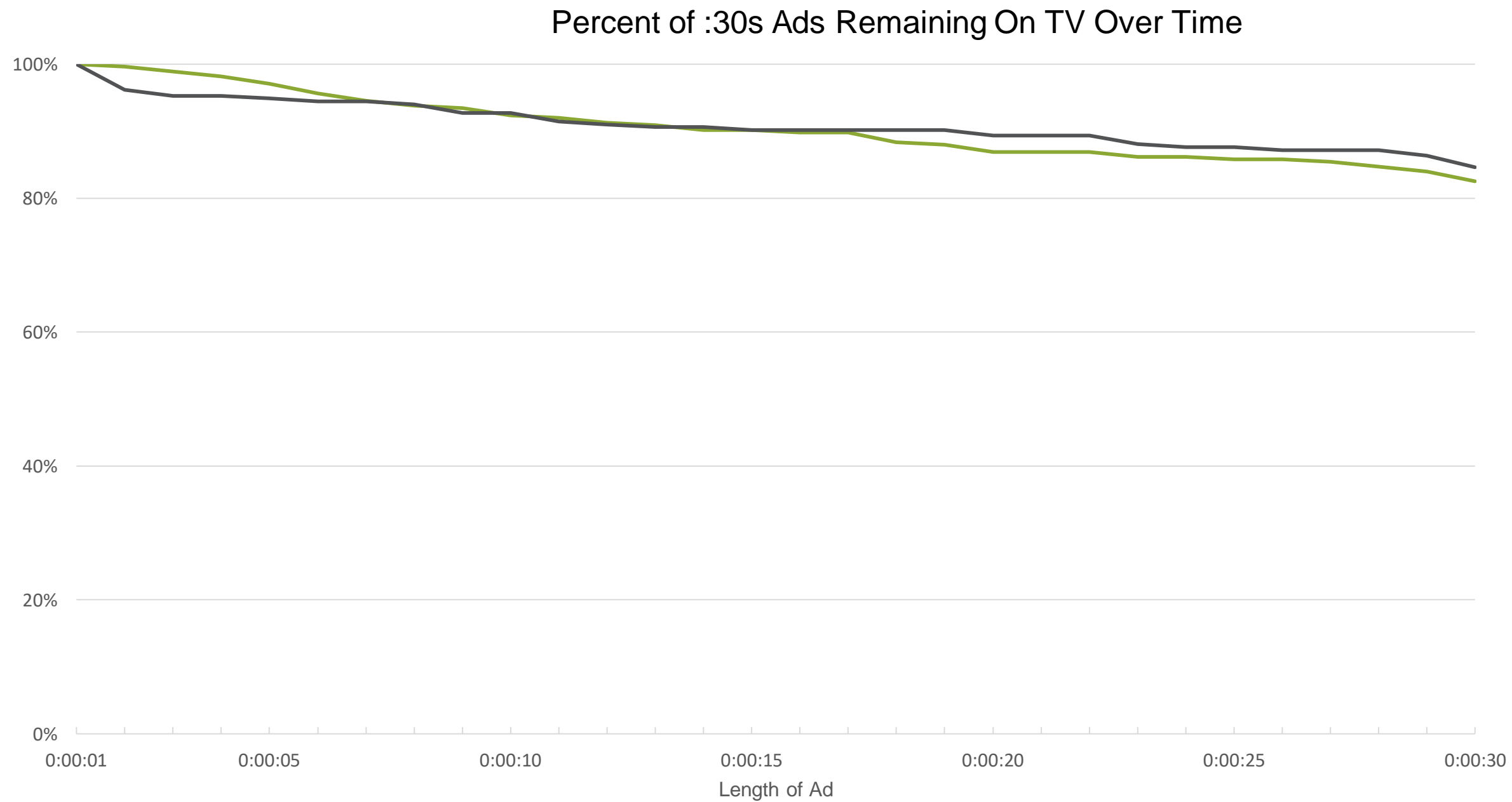
APPROXIMATELY HALF OF CONVERSATIONS ARE RELATED TO AD AND TV CONTENT

Percent of Total Time Spent in Conversation During Ads vs. Content



■ Conversation Related to Ad ■ Conversation Related to Content ■ Laughing or Personal Conversation

2ND SCREEN USERS REMAIN TUNED IN TO A HIGH PERCENTAGE OF FULL 30 SECOND ADS



Solo Viewer
w/2nd Screen
(275 ads)



Co-Viewer
w/2nd Screen
(234 ads)

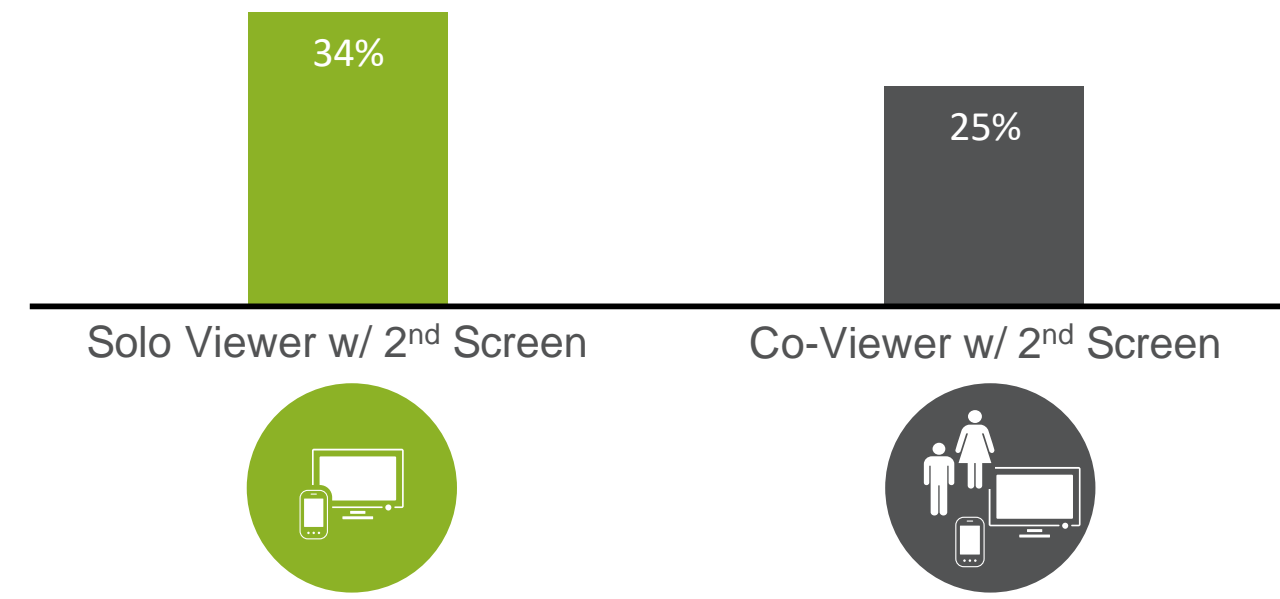
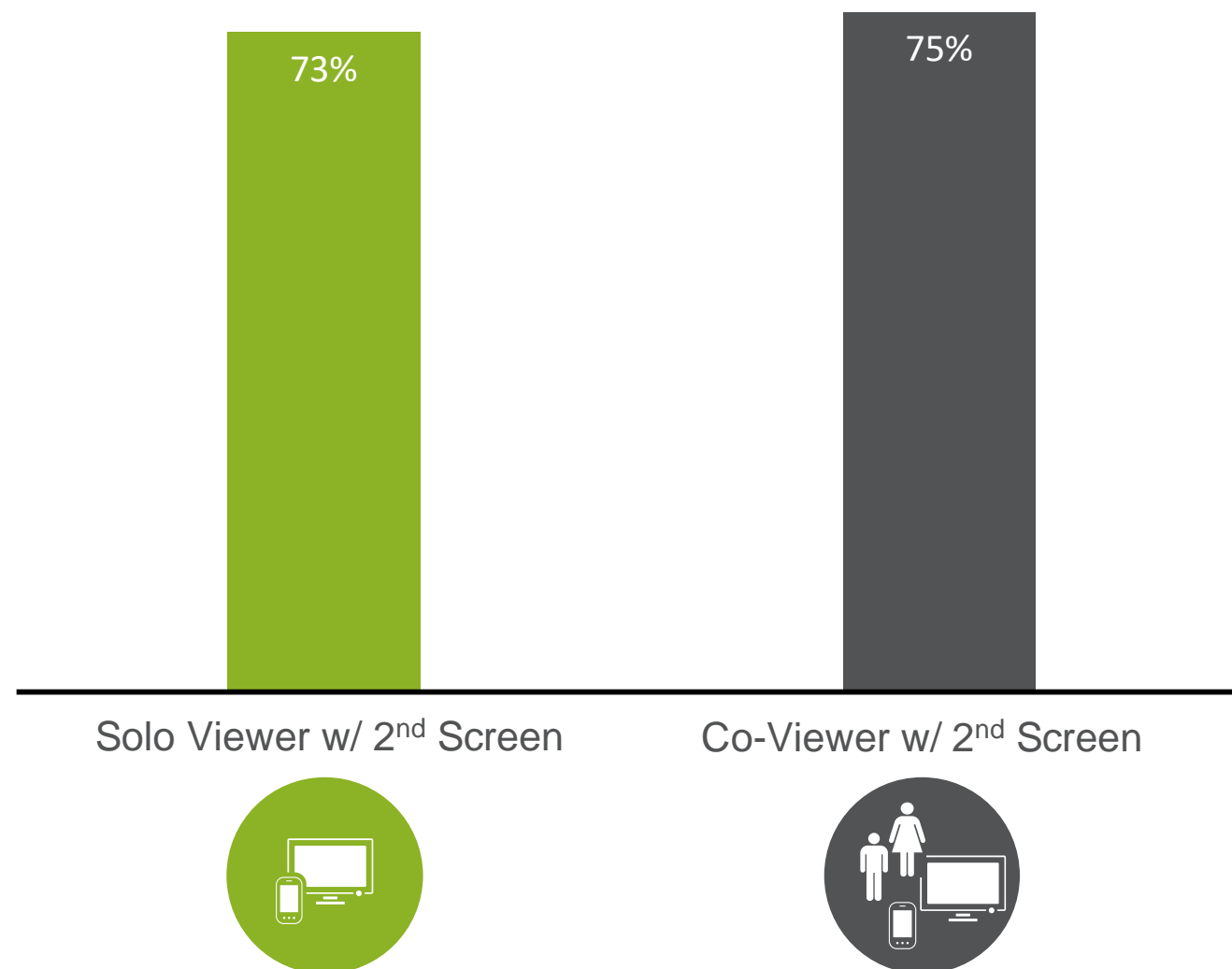


DESPITE BEING “TUNED IN,” 2ND SCREEN USERS SHOW LOW LEVELS OF FIXATION ON ADS

On Average, Viewers with 2nd Screen are 21% Points Lower than Viewers Without a 2nd Screen

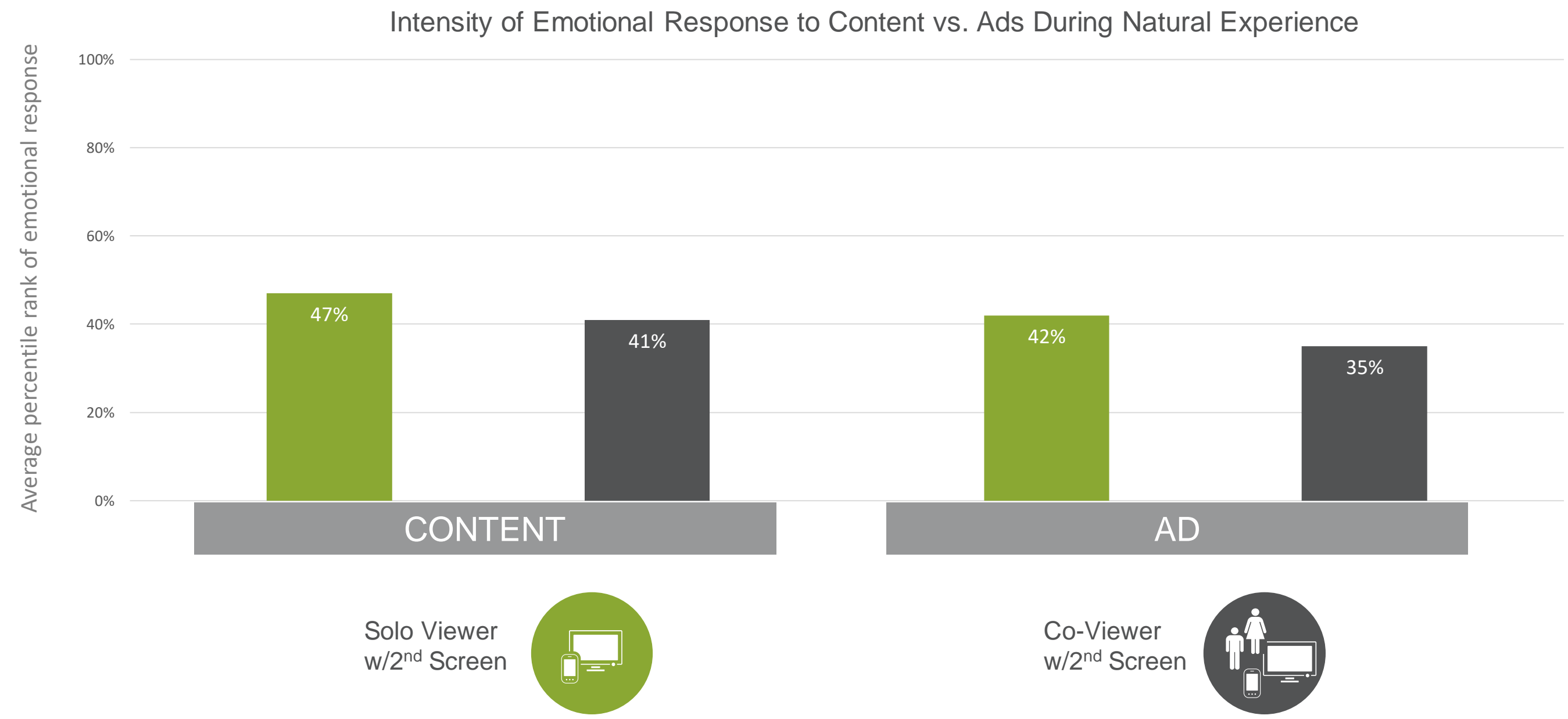
% Audience to Fixate on Ad at Least Once

% Time Spent in Fixation



ACCESS TO 2ND SCREEN MUTES EMOTIONAL RESPONSE TO ADVERTISING

In Contrast to Co-Viewing Without 2nd Screen



VIEWERS WITH 2ND SCREEN CONSISTENTLY OVERESTIMATE DEVICE USAGE

Co-Viewers Spend More Time on Their 2nd Screen Device than Solo Viewers

Estimated Time Spent Using 2nd Screen Device During Natural Experience



Q: What is your best estimate for the amount of time you spent using your device during tonight's free choice experience?



HOW DO VIEWERS RESPOND TO THE PEOPLE METER PROMPT?



This slide has been omitted from the deck due to reliability of (sample size) and validity (methodology) of data. Questions should be directed to info@researchexcellence.com

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EXECUTIVE SUMMARY



EXECUTIVE SUMMARY: CO-VIEWING



WATCH

Over 80% of TV watching behavior is on Content.
When ads are on screen, Solo viewers will spend 58% of time in fixation; this drops to 43% of the time among Co-viewers.



AUDIBLE EXPOSURE IN ROOM




The drop to 43% is likely due to conversation during ads relative to content as Co-Viewers are more likely to remain tuned in to 30 second ads in their entirety.



EMOTIONAL RESPONSE

Despite this distraction, the presence of Co-Viewer and opportunity for conversation increases the emotional response.

EXECUTIVE SUMMARY: 2ND SCREEN

 WATCH	<p>2nd Screen usage increases at least 50% during ads compared with content viewing for both Solo and Co-Viewers.</p>
 AUDIBLE EXPOSURE IN ROOM	<p>2nd Screen users are less likely to fixate on advertising compared to non-2nd Screen users by an average of 21 percentage points.</p> <p>However, 2nd Screen users are more likely to tune into a higher percentage of ads than Solo Viewers without a second screen.</p>
 EMOTIONAL RESPONSE	<p>2nd Screen use mutes the emotional response to advertising.</p>

This slide has been omitted from the deck due to reliability of (sample size) and validity (methodology) of data. Questions should be directed to info@researchexcellence.com



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