



Annual  
**Conference**  
RE!THINK 2017

# The Mind of the Viewer

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#ARFannual17

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# 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 [viewing] may need to expand to accommodate additional behaviors beyond the current “watching” and “listening.”*

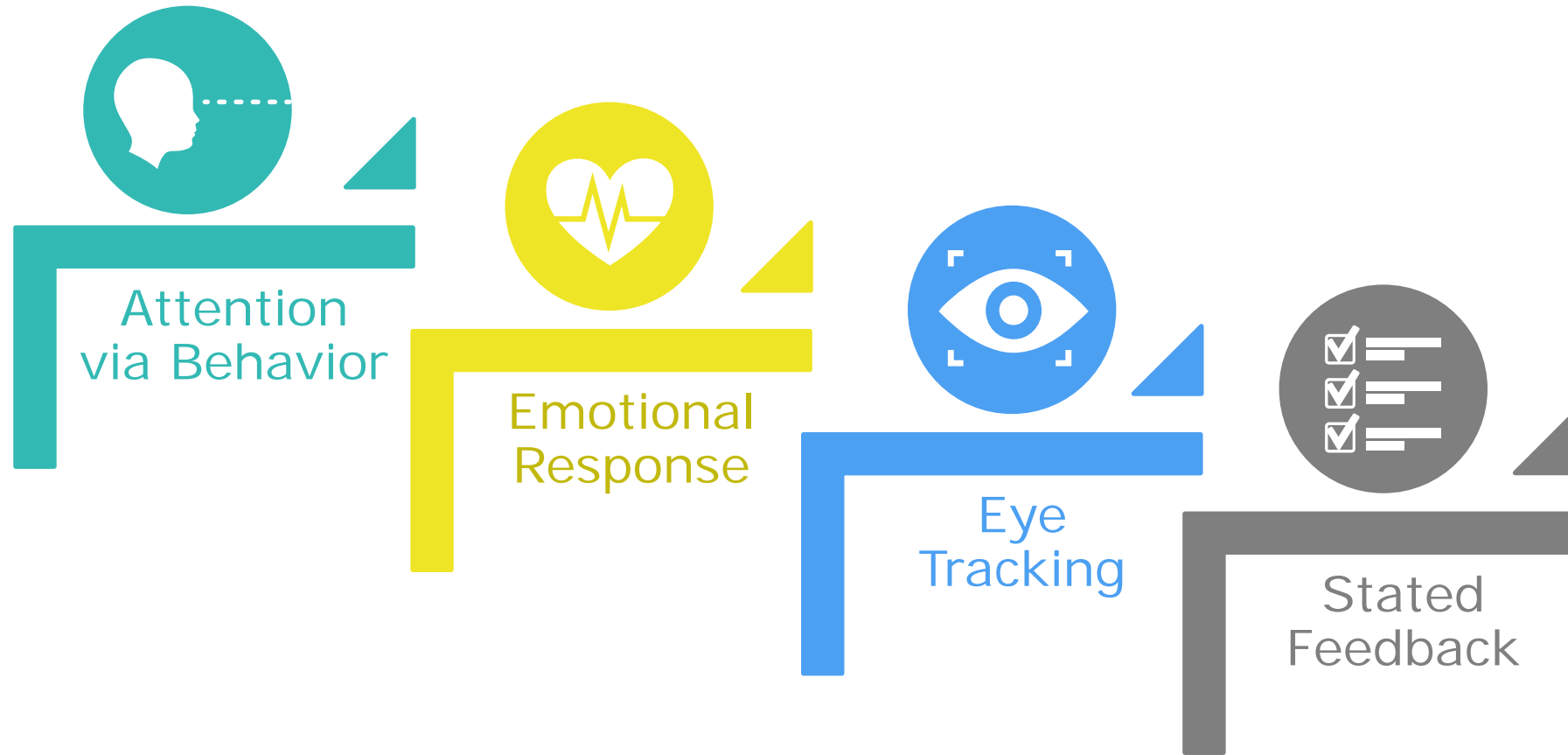
## BENEFITS TO THE INDUSTRY:



➤ 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.

# Understanding the Mind of the TV Viewer: Two Phases, Multiple Methodologies



Phase 1 In-Lab, n=202

Phase 2 In-Home, n=126

# Phase 2 In-Home Study Demographics



## PARTICIPANT CUSTOM RECRUIT

N (Total) = 126



## GENDER

Male : 47%  
Female: 53%

## AGE

18 – 34 years: 37%  
35 – 49 years: 43%  
50 – 59 years: 20%



## CHILDREN IN THE HOME (UNDER 18)

Children Under 18: 47%  
No Children in the Home: 53%



## HOUSEHOLD INCOME

\$59,999 or less: 34%  
\$60,000 - \$79,999: 22%  
\$80,000+ : 44%



## HOUSEHOLD COMPOSITION

Single Person Household: 12%  
Multi-person Household: 88%



## RACE

White: 73%  
African-American: 13%  
Asian: 2%  
Other: 12%



Participants fielded in 3 US markets



# Phase 1 In-Lab Snapshot

*Highlights of Distraction Research in the Lab*

# Behavior while Watching TV is Constantly Changing and More Complex when with a Co-Viewer or Second Screen

Sample Individual Participants During Natural Viewing Behavior In a Lab

IN-LAB NATURAL EXPERIENCE



Sample Solo Viewer



5:50 PM

6:00 PM

6:10 PM

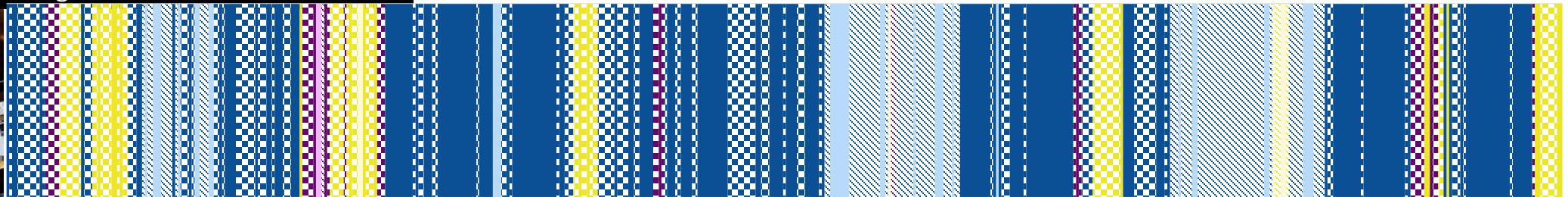
6:20 PM

6:30 PM

■ Ad      ■ Channel Change      ■ Content



Sample Co-Viewing Pair w/ Second Screens



5:50 PM

6:00 PM

6:10 PM

6:20 PM

6:30 PM

■ Ad, 2nd Screen, Conversation  
 ■ Ad  
 ■ Channel Change, Conversation,  
 ■ Content, 2nd Screen,

■ Ad, 2nd Screen  
 ■ Channel Change, 2nd Screen, Conversation  
 ■ Channel Change  
 ■ Content, Conversation

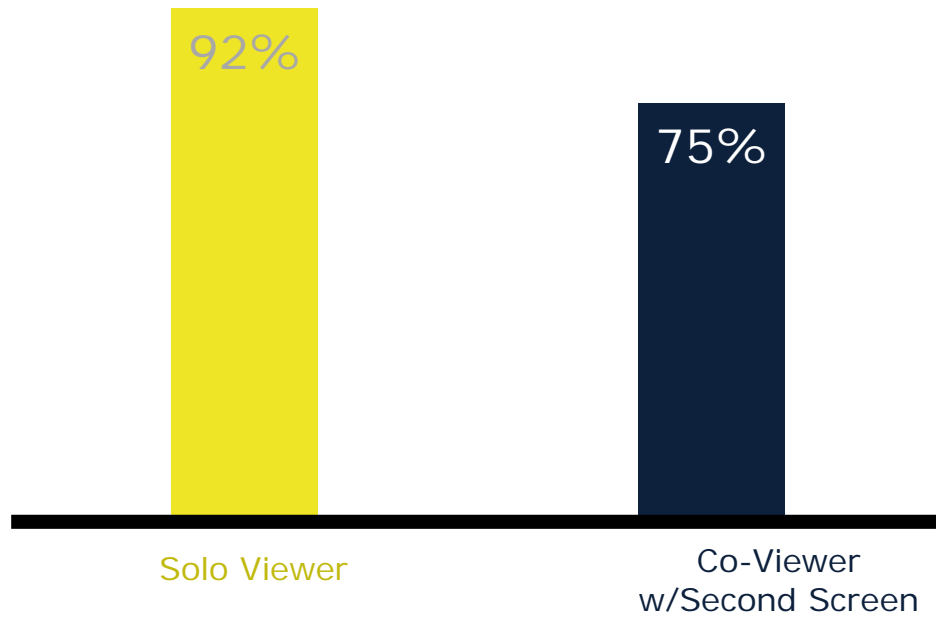
■ Ad, Conversation  
 ■ Channel Change, 2nd Screen,  
 ■ Content 2nd Screen, Conversation  
 ■ Content



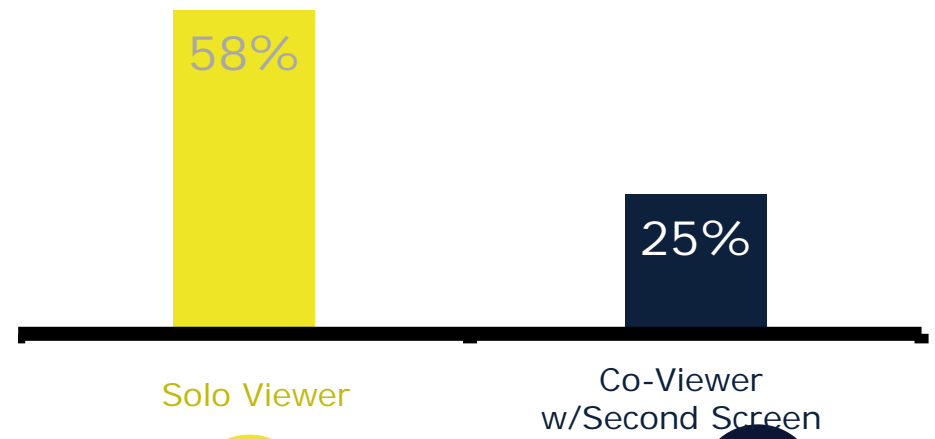
# Attention to Ads Drops Among Co-Viewers with a Second Screen

IN-LAB CURATED EXPERIENCE

% Audience who Fixate on Ad at Least Once



% Time Spent in Fixation on Ad



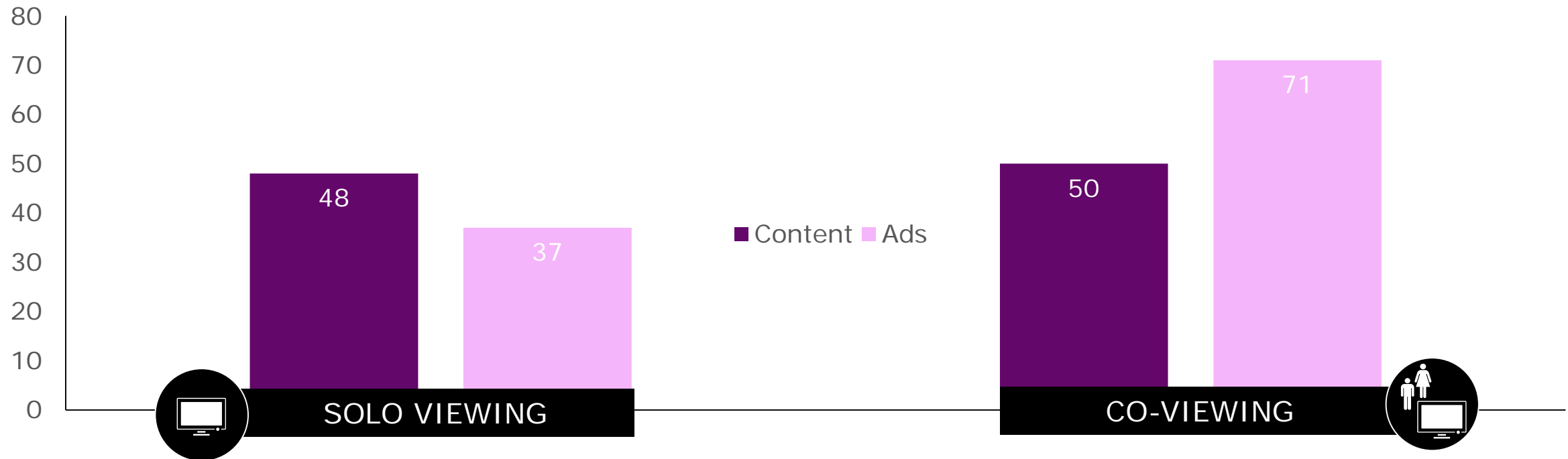


# For Co-viewers, Emotional Response for Ads is Impacted by Conversation

IN-LAB NATURAL EXPERIENCE

Among Solo Viewers, Content Stimulates Greater Response than Ads

Intensity Emotional Response Across All Ads vs. Content



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

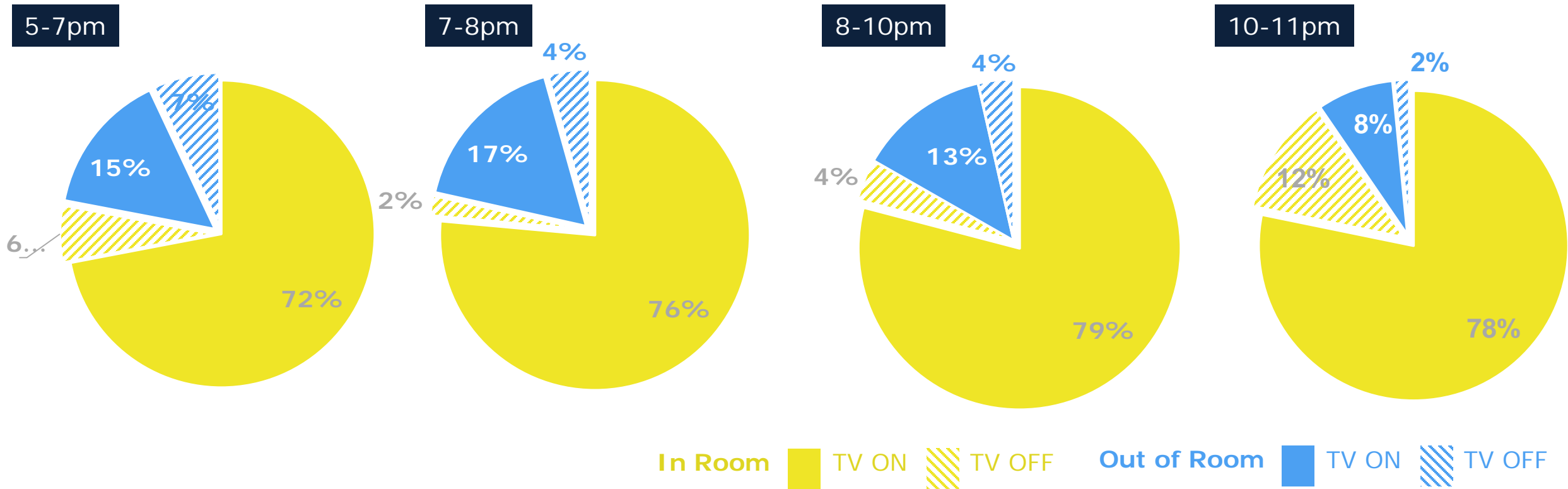


# What is the Viewing Environment in the Home?

*Phase 2 In-Home*

# In a Typical Evening, TV is on with Viewers In the Room, an Average 77% of the Time

Percentage of Time TV was turned on vs off and the Participant was in vs out of the room for Evening Hours

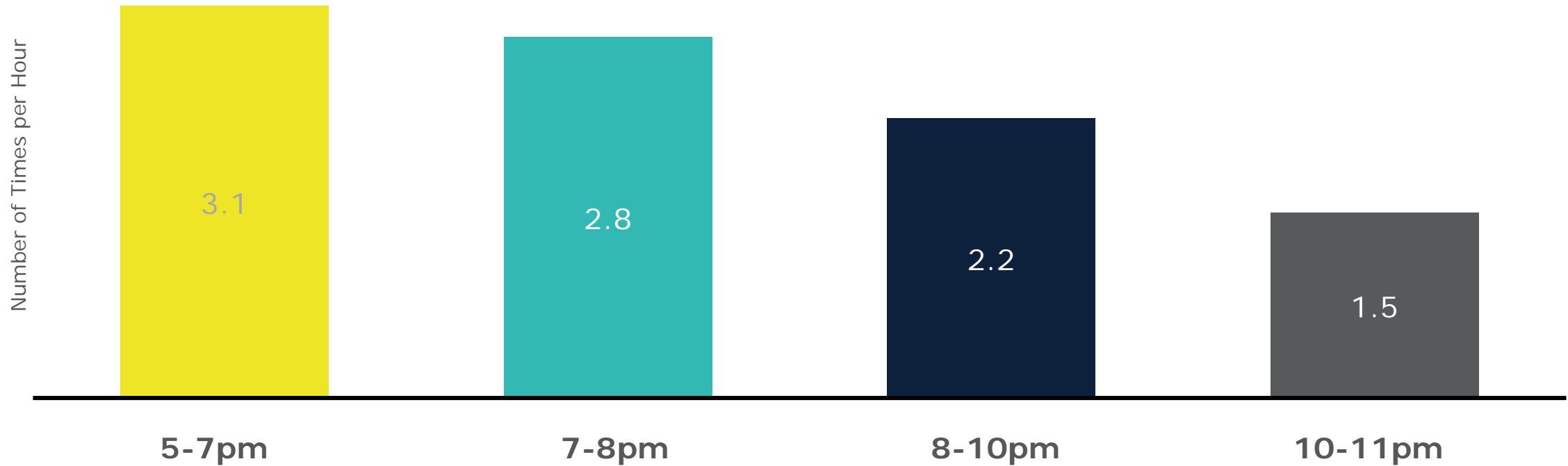


Average Time TV is on and Person is in Room, per night: **3:07 hours**

\*Only includes participants that are using the equipment during these time periods

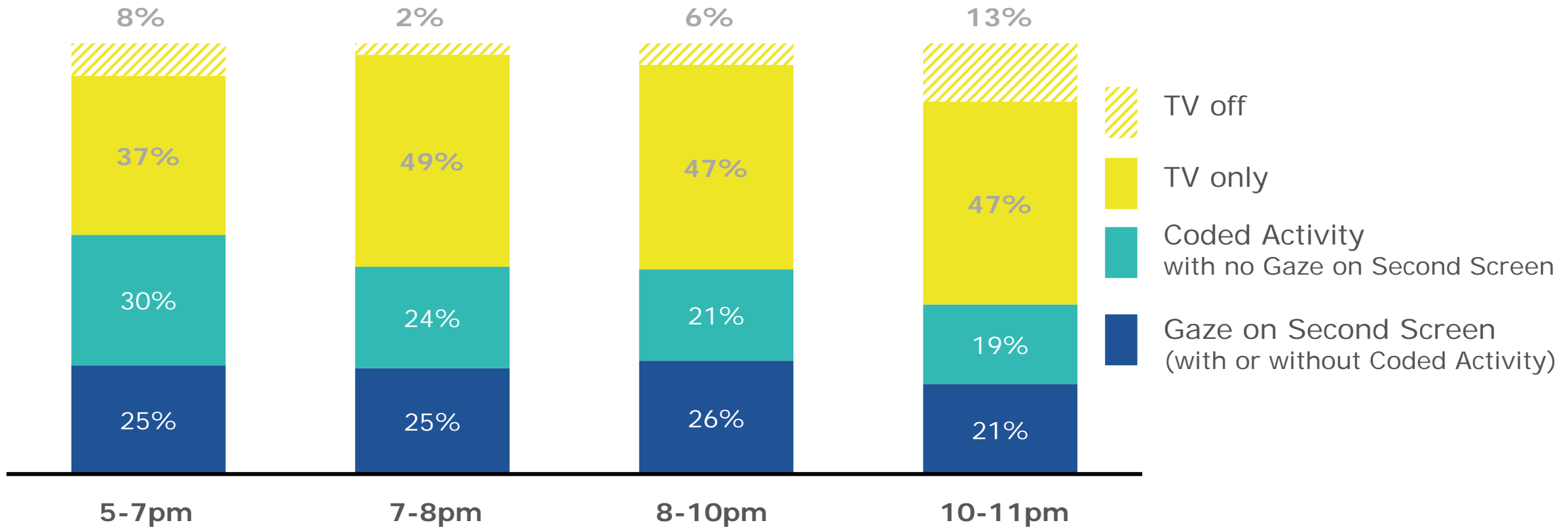
# People Tend to Leave the TV Room More Frequently During Early Evening

Number of Times Participant Leaves Room per Hour



# Second Screen Usage and other Activities Compete for Viewer Attention at Least 40% of the Time

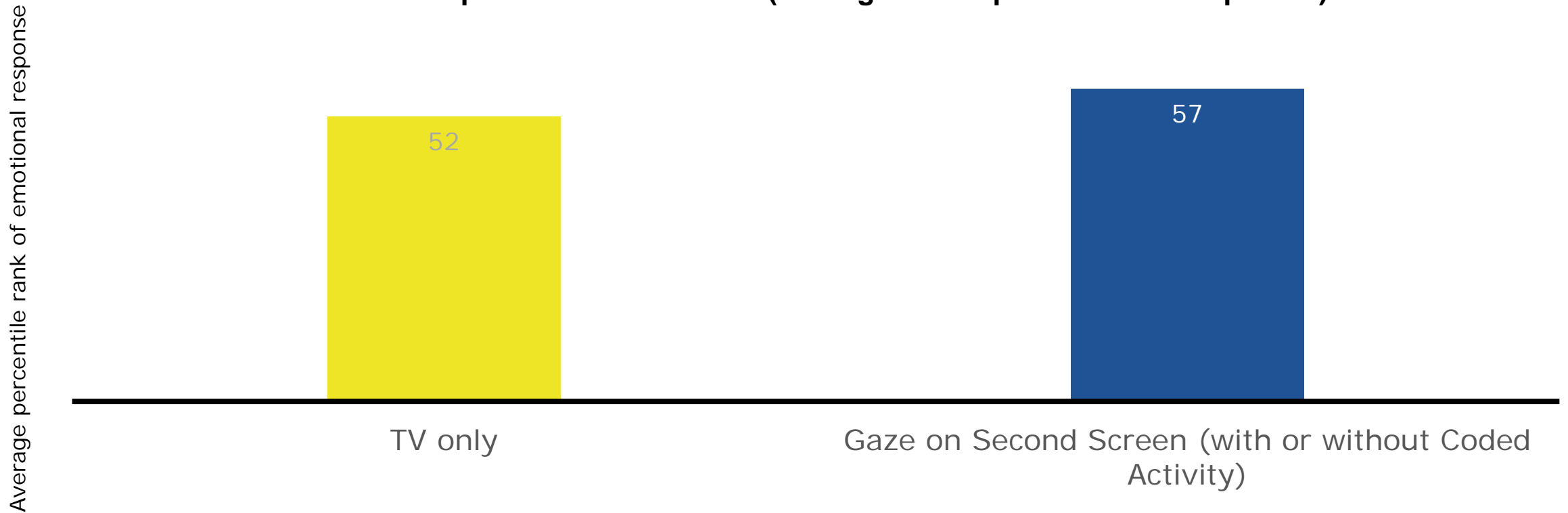
Viewing Environment in the Room



# Emotional Response when Viewing TV or Using Second Screen at Parity

Second screen & TV offer a range of experiences, some more immersive than others

**Emotional Response When TV is On (Average Peaks per Minute & Amplitude)**



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

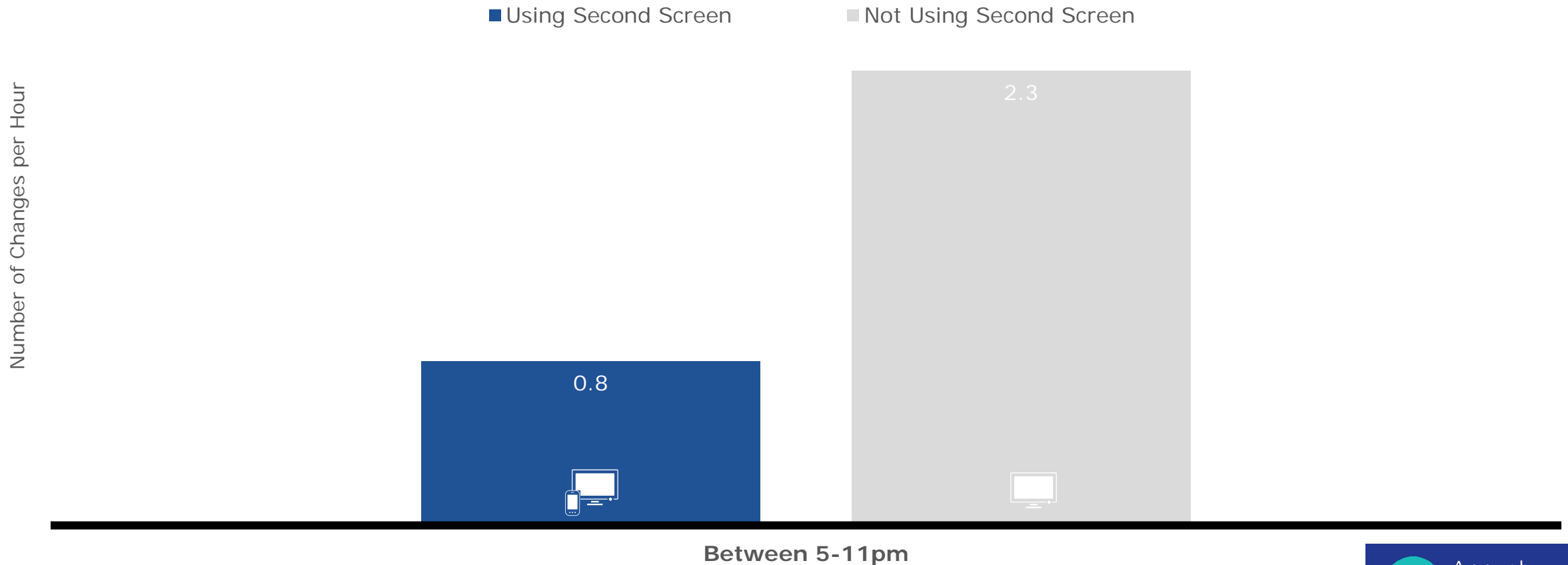


# How is Second Screen Impacting TV Viewing Behavior?

*Phase 2 In-Home*

# Use of Second Screen Decreases Incidence of Channel Changing Behavior

## Average Changes per Hour

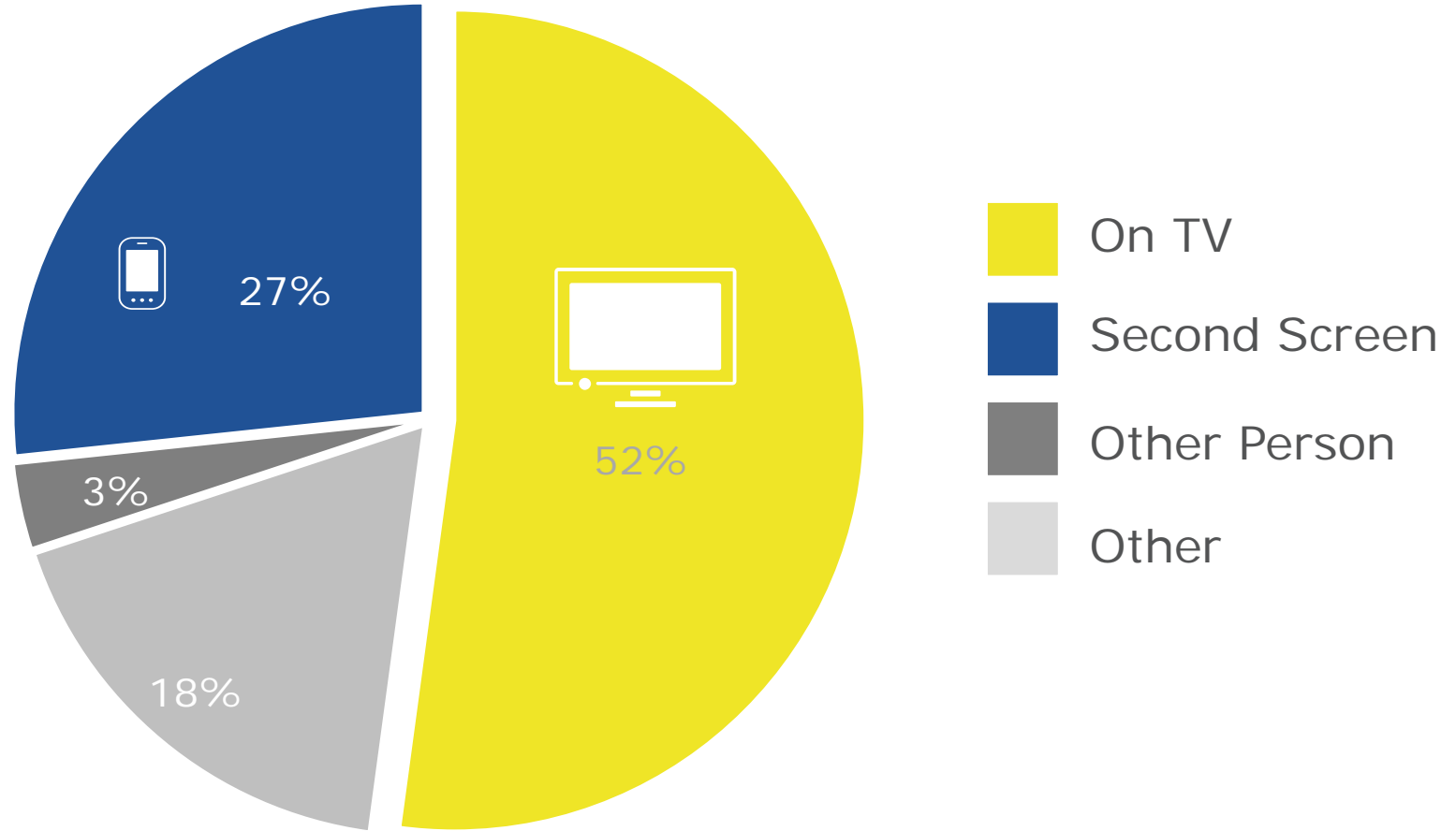


BEHAVIOR



# While TV is On, Second Screen Distracts from TV 27% of the Time

Gaze Patterns While TV is On



\*Other includes looking around the room and looking at reading materials  
TV is on and participant is in the room

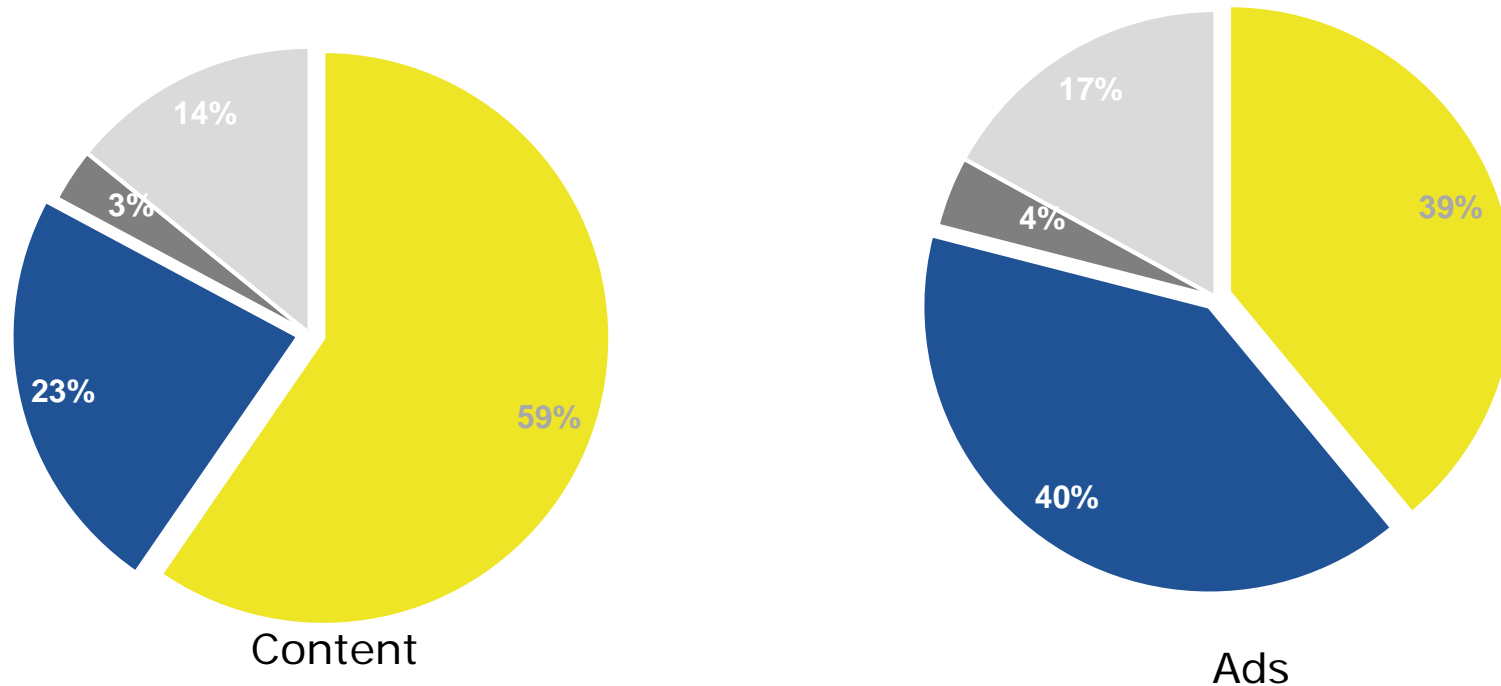


GAZE

# Gaze on Second Screen Increases during Ads

IN-HOME

Gaze Patterns as Percentage of Total Time between 5-11pm



■ On TV ■ Second Screen ■ Other Person ■ Other

\*Other includes looking around the room and looking at reading materials  
TV is on and participant is in the room



GAZE



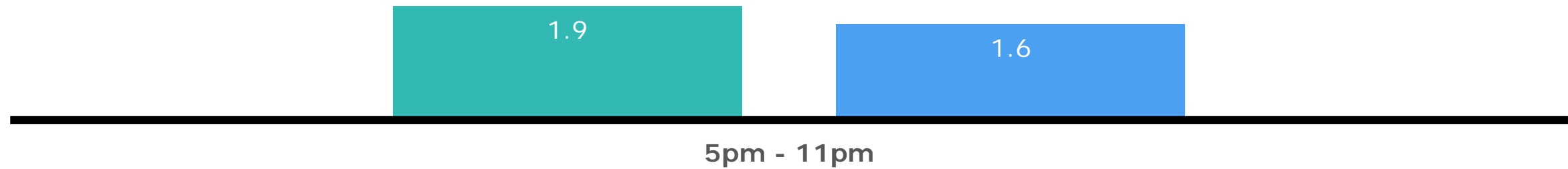
# What Is the Impact of Co-Viewing When Watching TV?

*Phase 2 In-Home*

# Incidence of Channel Changing Behavior while Co-Viewing Decreases Slightly

Average Changes per Hour

Number of Changes per Hour



BEHAVIOR



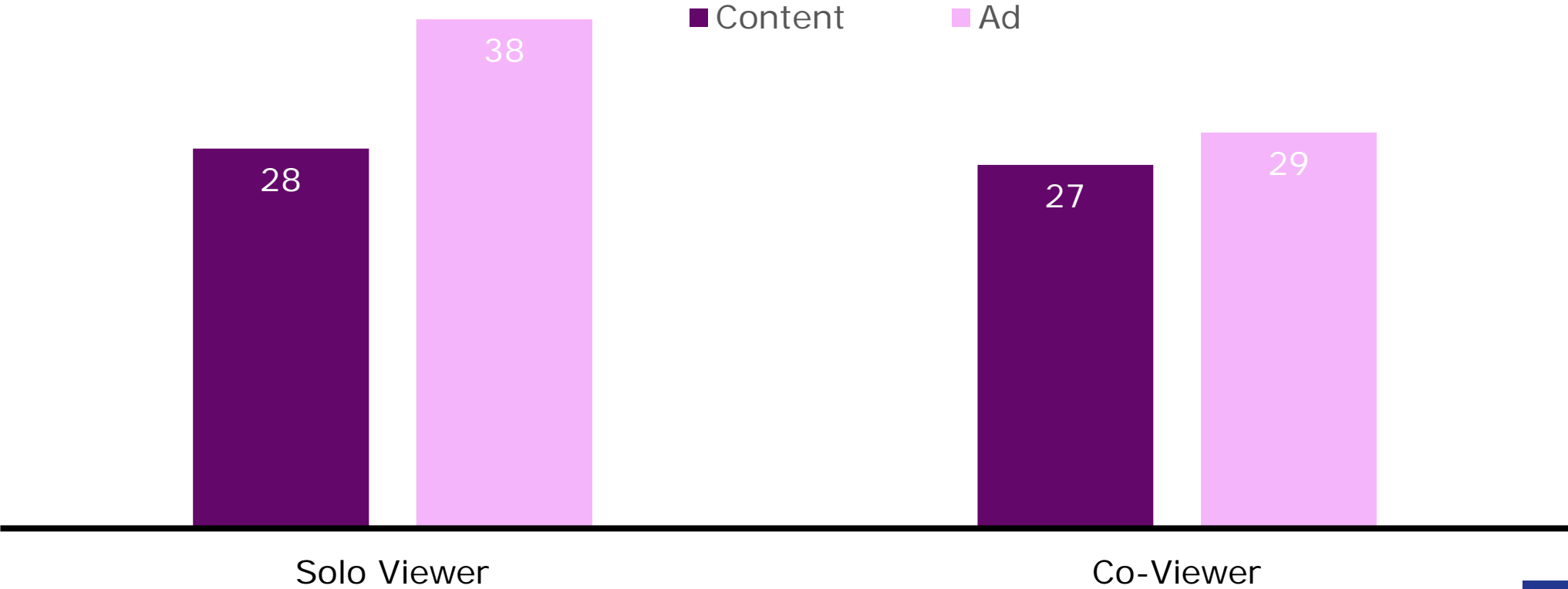
Solo Viewing



Co-Viewing

# Occasions to Glance at Second Screen Decrease when Co-viewing

Median Number Of Second Screen Glances Per Hour, Per Person

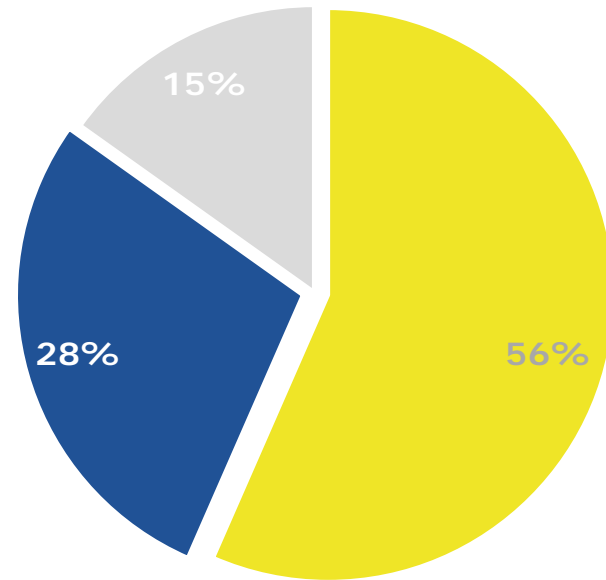


\*Solo Viewing includes any participant who watches TV alone regardless of household composition

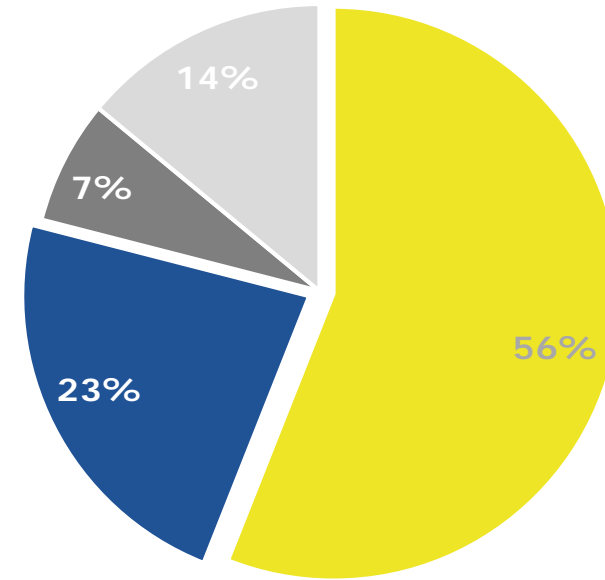
TV is on and participant is in the room

# Time Spent on Second Screen Decreases when Co-Viewer Present

Gaze Patterns as Percentage of Total Time between 5-11pm



Solo Viewing



Co-Viewing



\*Other includes looking around the room and looking at reading materials  
TV is on and participant is in the room

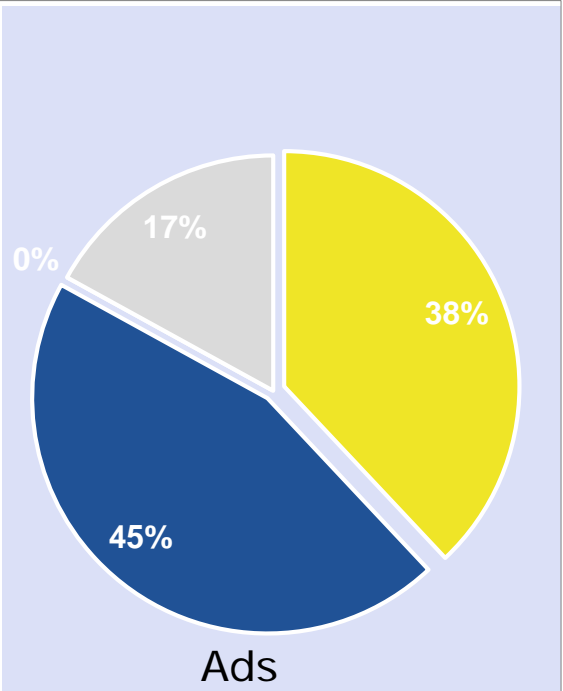
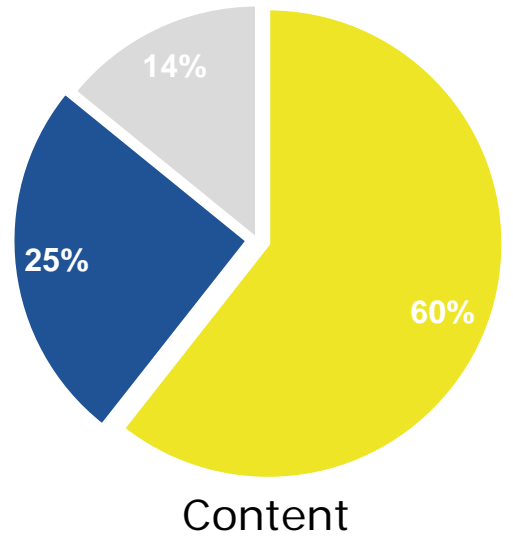


GAZE

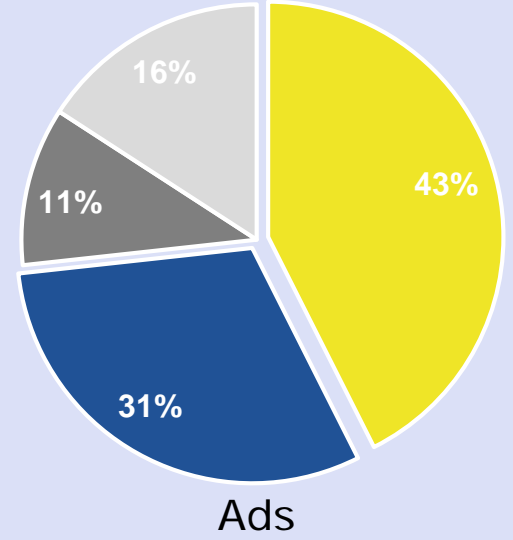
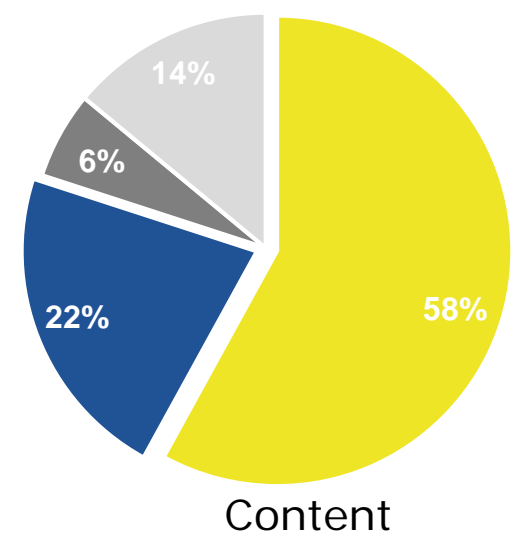
# During Ads, Co-Viewers Spend More Time on TV and Less Time On Second Screen

Gaze Patterns as Percentage of Total Time

**SOLO VIEWING**



**CO-VIEWING**

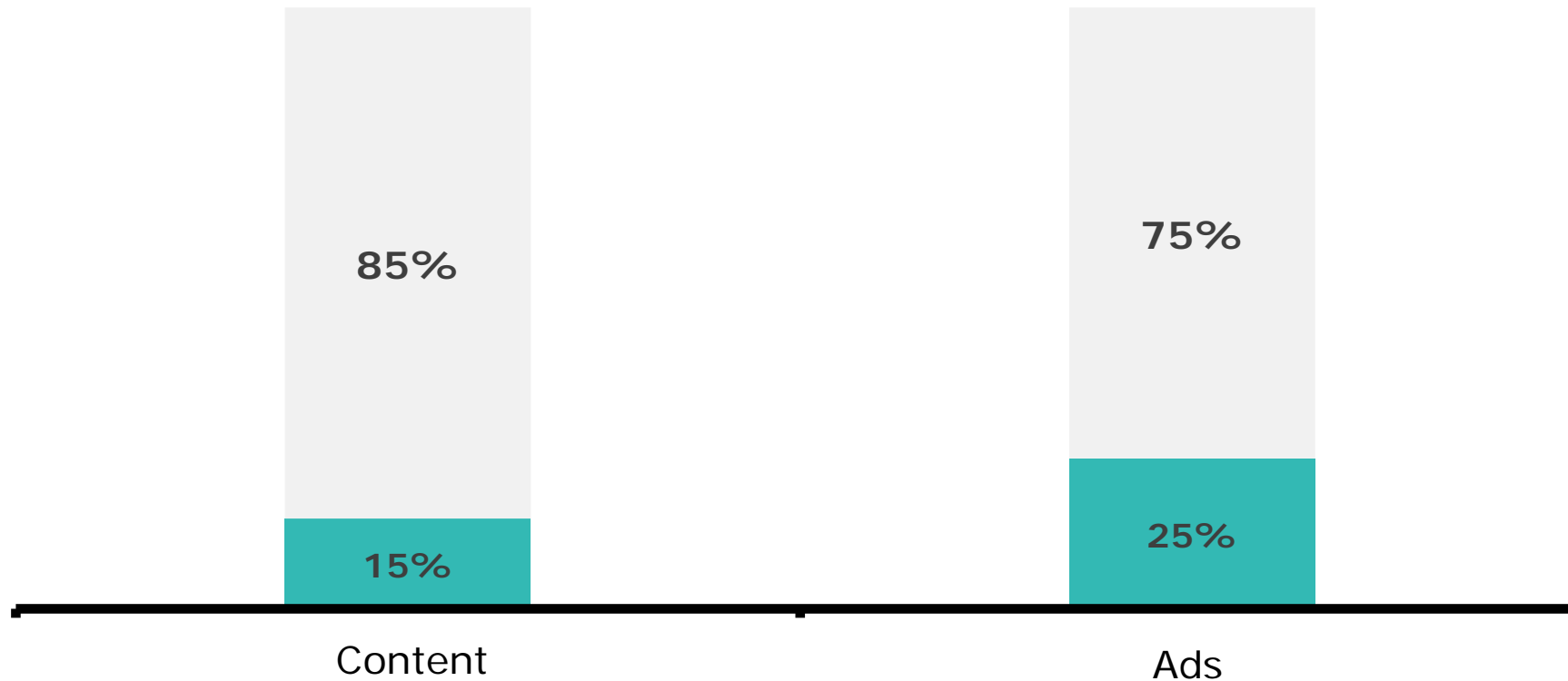


■ On TV    
 ■ Second Screen    
 ■ Other Person    
 ■ Other

\*Other includes looking around the room and looking at reading materials  
TV is on and participant is in the room

# Conversation More Likely During Ads than Content

Among Co-Viewers: Percentage of Time Spent in Conversation While TV is On During Ads or Content



TV is on and participant is in the room

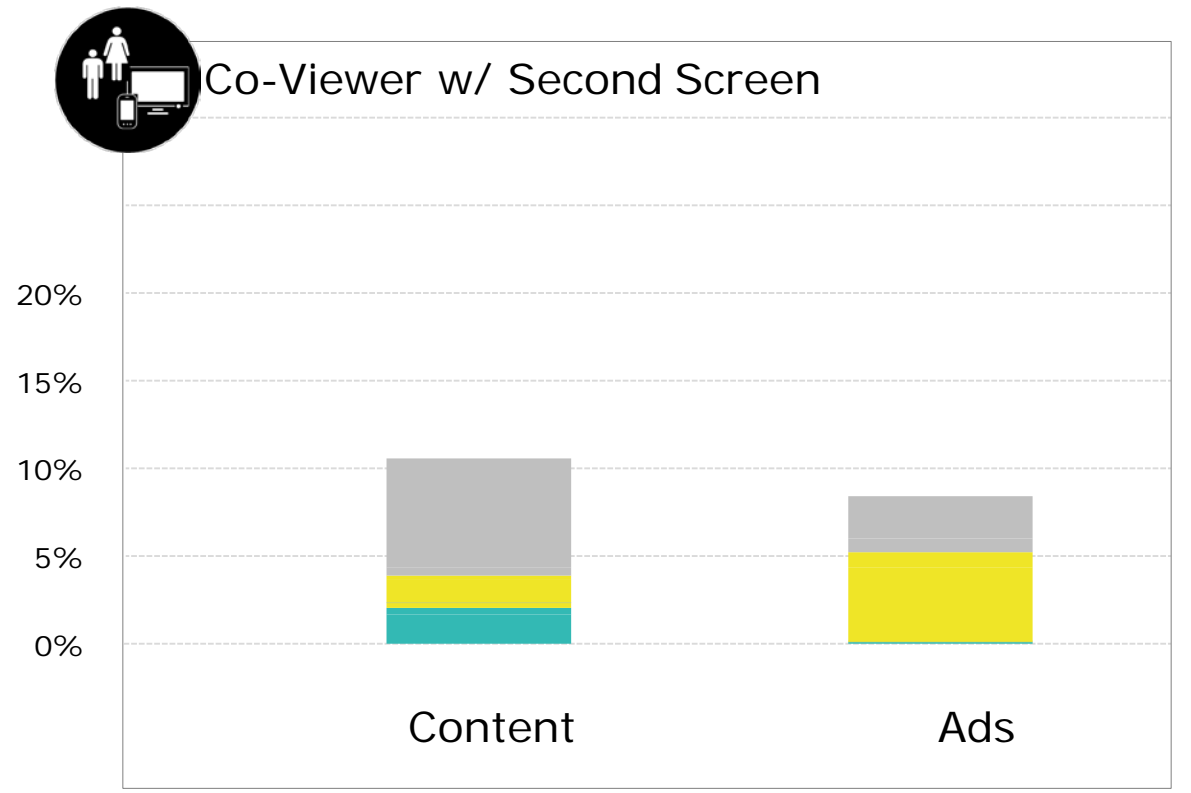
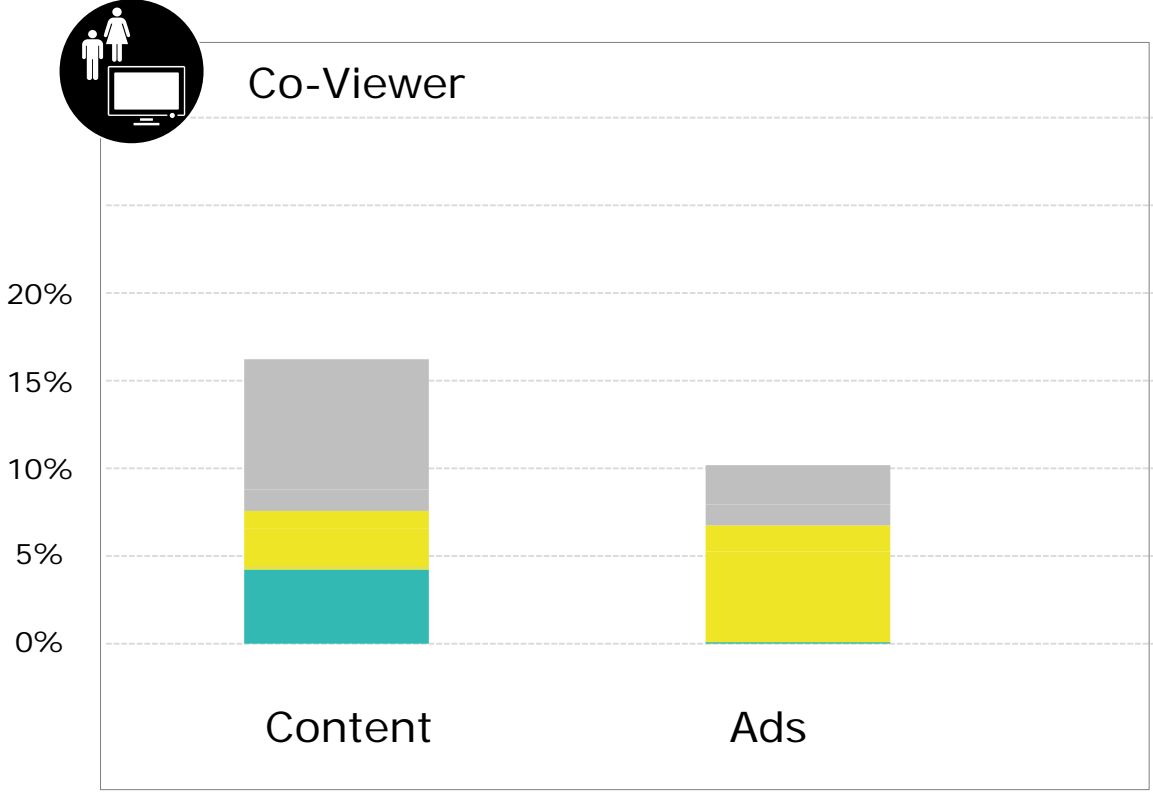






# Approximately Half of Conversations are Related to Ad and TV Content


IN-LAB NATURAL EXPERIENCE

### Percentage of Total Time Spent in Conversation During Ads vs. Content



 Conversation Related to Ad

 Conversation Related to Content

 Laughing or Personal Conversation

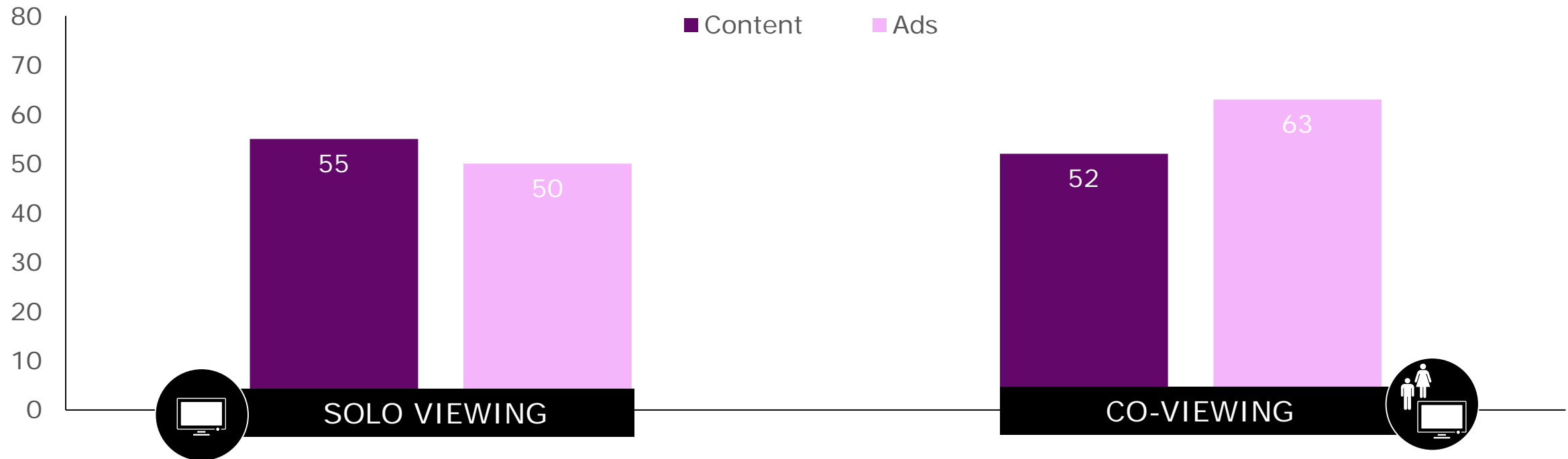


# For Co-viewers, Presence of another Viewer Increases Emotional Response to Ads

IN-HOME

Among Solo Viewers, Content Stimulates Greater Response than Ads

Intensity Emotional Response Across All Content vs. Ads

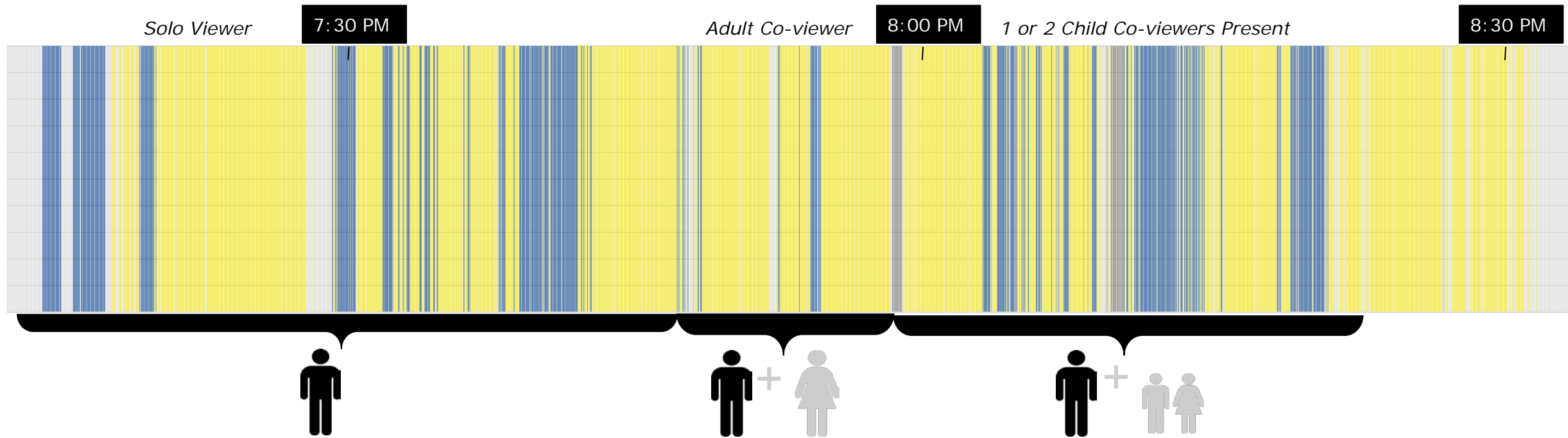


INTENSITY: Height of "Peak" response captured across all ad exposure vs. content exposure. Amplitude refers to peak of emotional arousal. Normalized z-scores for complete experience. 50 is the mean. Meaningful Differences between Content & Ads among Solo Viewers.

# Patterns of Gaze Shift Back to TV & Other Person When Co-Viewer Arrives in Room

IN-HOME

## Sample Household During Natural Viewing Behavior



GAZE PATTERNS



On TV



Second Screen



Other Person



Other

# Executive Summary



# Executive Summary

## DISTRACTING ENVIRONMENT

In the home, TV's are on for 77% of the evening from 5-11pm. When TV is on, consumers are distracted by second screens and other activities at least 40% of the time.