The Mind of the Viewer

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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:
- Denver, CO
- Atlanta, GA
- Tampa & Orlando, FL
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

Sample Co-Viewing Pair w/ Second Screens
Attention to Ads Drops Among Co-Viewers with a Second Screen

- % Audience who Fixate on Ad at Least Once:
  - Solo Viewer: 92%
  - Co-Viewer w/Second Screen: 75%

- % Time Spent in Fixation on Ad:
  - Solo Viewer: 58%
  - Co-Viewer w/Second Screen: 25%

IN-LAB CURATED EXPERIENCE
For Co-viewers, Emotional Response for Ads is Impacted by Conversation.

Among Solo Viewers, Content Stimulates Greater Response than Ads.

Intensity Emotional Response Across All Ads vs. Content

SOLO VIEWING

CO-VIEWING

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

5-7pm
- TV ON: 15%
- TV OFF: 7%
- In Room: 62%
- Out of Room: 38%

7-8pm
- TV ON: 4%
- TV OFF: 17%
- In Room: 72%
- Out of Room: 28%

8-10pm
- TV ON: 4%
- TV OFF: 13%
- In Room: 76%
- Out of Room: 24%

10-11pm
- TV ON: 8%
- TV OFF: 12%
- In Room: 78%
- Out of Room: 22%

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

- 5-7pm: 3.1
- 7-8pm: 2.8
- 8-10pm: 2.2
- 10-11pm: 1.5
Second Screen Usage and other Activities Compete for Viewer Attention at Least 40% of the Time

Viewing Environment in the Room

<table>
<thead>
<tr>
<th>Time</th>
<th>TV off</th>
<th>TV only</th>
<th>Coded Activity with no Gaze on Second Screen</th>
<th>Gaze on Second Screen (with or without Coded Activity)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-7pm</td>
<td>37%</td>
<td>30%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>7-8pm</td>
<td>49%</td>
<td>24%</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>8-10pm</td>
<td>47%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>10-11pm</td>
<td>47%</td>
<td>19%</td>
<td>19%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Emotional Response When TV is On (Average Peaks per Minute &amp; Amplitude)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV only</td>
</tr>
<tr>
<td>52</td>
</tr>
</tbody>
</table>

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

Between 5-11pm

Using Second Screen: 0.8
Not Using Second Screen: 2.3
While TV is On, Second Screen Distracts from TV 27% of the Time

Gaze Patterns While TV is On

- On TV: 52%
- Second Screen: 27%
- Other Person: 3%
- Other: 18%

*Other includes looking around the room and looking at reading materials TV is on and participant is in the room
Gaze on Second Screen Increases during Ads

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

- **Content**
  - On TV: 59%
  - Second Screen: 23%
  - Other Person: 14%
  - Other: 3%

- **Ads**
  - On TV: 40%
  - Second Screen: 17%
  - Other Person: 4%
  - Other: 39%

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

- **5pm - 11pm**
  - **Solo Viewing**: 1.9 changes per hour
  - **Co-Viewing**: 1.6 changes per hour
Occasions to Glance at Second Screen Decrease when Co-viewing

Median Number Of Second Screen Glances Per Hour, Per Person

- **Solo Viewer**
  - Content: 28
  - Ad: 38

- **Co-Viewer**
  - Content: 27
  - Ad: 29

*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

- On TV: 56%
- Second Screen: 28%
- Other Person: 7%
- Other: 15%

Co-Viewing

- On TV: 56%
- Second Screen: 23%
- Other Person: 14%
- Other: 7%

*Other includes looking around the room and looking at reading materials TV is on and participant is in the room
During Ads, Co-Viewers Spend More Time on TV and Less Time On Second Screen

Gaze Patterns as Percentage of Total Time

SOLO VIEWING

- Content: 60%
- Ads: 38%

CO-VIEWING

- Content: 58%
- Ads: 43%

*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

- 85% content
- 75% ads

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

Co-Viewer

Co-Viewer w/ Second Screen

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

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

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

Sample Household During Natural Viewing Behavior
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.