

COUNCIL FOR RESEARCH EXCELLENCE UNVEILS SECOND PHASE OF “THE MIND OF THE VIEWER” STUDY AT ARF ANNUAL CONFERENCE

In-Home Phase Used Consumer Neuroscience to Evaluate Impact of Second Screens and Co-Viewing on Viewing TV Content and Ads

NEW YORK, March 21, 2017-- The Council for Research Excellence (CRE) today unveiled findings from the second of a two-phased neuroscience-based study designed to better understand how consumers view television programming and advertising in a multi-platform world. The in-home phase of “The Mind of the Viewer” reinforces that networks and brands have opportunities to engage with viewers but that it’s important to understand how different types of distractions compete for viewer attention.

In this naturalistic study, viewers were distracted nearly 48% of the time while the TV was on, whether by gazing at a second screen or engaging in other activities. Importantly, the second screen was the predominant competitor for viewer attention, accounting for nearly half of all distractions. Interestingly, the presence of a second screen minimized the incidence of channel changing while the presence of a co-viewer not only reduced the amount of time spent on second-screen devices, it also increased emotional response while ads were on the TV by more than 25%.

The results were presented at the Advertising Research Foundation's annual conference today by Nielsen's Dr. Carl Marci, EVP and Chief Neuroscientist, and Naomi Nuta, VP Client Services, along with Richard Zackon, CRE Facilitator.

"The results show there is a significant amount of competition for the attention of viewers whether in the lab or in the home," said Dr. Carl Marci, Chief Neuroscientist at Nielsen. "The bar is higher than ever for brands, content producers and research firms to understand and measure the forces at play for viewers in the modern media landscape."

Building upon data from a comprehensive, multi-condition lab-based study, the second phase took place in the home in late 2016 and was designed to examine the following claim: "As more households include multi-platform devices as part of their regular viewing behavior, the industry definition of viewing may need to evolve to accommodate additional behaviors."

The study reported findings in three areas: General Viewing Environment, Impact of Second Screen, and the Impact of Co-Viewing.

General Viewing Environment

The study, which was conducted between 5pm and 11pm, found that when the TV was on, respondents were in the room on average 77% of the time. While the TV was on, participants were distracted from viewing nearly 48% of the time by gazing at a second screen or engaging in other activities, with the second screen the predominant competitor for viewer attention, accounting for nearly half of all distractions. Viewers left the room relatively infrequently, on average 2.5x per hour while the TV was on.

Impact of Second Screen

Gaze (as a percent of total time) to second screen was found to increase during ads, more so during prime time.

	During Content	During Ads
Gaze on TV:	59%	39%
Gaze on second screen:	23%	48%

Also, the incidence of channel changing is nearly 3x higher without the competition from the second screen.

Impact of Co-Viewing

The study found that, on average, co-viewing occurs 39% of the time, predominantly among 35-49 year olds.

During ads, co-viewers spent more time viewing the TV screen and less time on a second screen than did solo viewers.

	Gaze at TV	Gaze at Second Screen
Solo viewers (during ads)	38%	45%
Co-viewers (during ads)	43%	31%

The in-home study reported out at the ARF event was conducted over two weeknights among 126 participants. Recruited viewers were assigned to watch television as they normally would, and to have a second screen accessible as they normally would. Their behavior was monitored via observational glasses and cameras in the room. Participants' emotions were monitored via biometric wrist devices, and second screen usage was monitored via passive metering. Holistic insights were informed by multiple metrics: attention via gaze tracking, conversation via behavioral coding and emotional response via biometrics.

Last September, the CRE reported out findings from Phase 1 of its consumer neuroscience research, an in-lab study conducted jointly at the Time Warner Media Lab in New York and Nielsen Consumer Neuroscience's lab in Boston. In that study, 202 participants were seated in a simulated living room environment, and data were collected with biometric devices to measure emotional response, eye tracking devices to measure visual attention, facial coding cameras to capture expressed emotion, and video cameras to capture behavior at second-by-second levels.

Data sets uncovered strong similarities between behaviors in a lab environment compared with in the home, suggesting that in-lab studies provide more data reliability than previously considered.

Both phases of the study were led by Howard Shimmel, Chief Research Officer, Turner Broadcasting System and Chair of the CRE's Neurometrics Committee, and Beth Rockwood, VP, Portfolio Research and Chief of Staff at Turner and Vice Chair of the CRE committee. Research was conducted by a Nielsen team led by Marci.

"This study leaves little doubt that the definition of viewing is evolving," said Billy McDowell, Vice President, Research for Raycom Media and Chair of the CRE. "The CRE will continue to work to help ensure that audience measurement methodologies evolve in kind."

Shimmel added: "The two phases of our 'The Mind of the Viewer' study provide significant insights into how people watch TV in today's multi-screen world. As we consider multi-screen measurement, it's important to understand how consumers are navigating seamlessly across screens. We look forward to sharing these findings with Nielsen Measurement Sciences."

About the Council for Research Excellence

The Council for Research Excellence (CRE) is an independent research group created in 2005 and funded by Nielsen. The CRE is dedicated to advancing the knowledge and practice of audience measurement methodology and comprises senior-level industry researchers.

CRE members are ABC Owned Stations, Beasley Media Group, CBS, clypd, Comcast, Cox Media Group, CoxReps, ESPN, ITN Networks, Katz Media Group, the Media Rating Council, NBC Universal, Nielsen, Omnicom Media Group, Radio Advertising Bureau, Raycom Media, Scripps Networks Interactive, Television Bureau of Advertising, Tribune Co., Turner Broadcasting, 20th Television, Twitter, Univision, Viacom Entertainment Group and Weigel Broadcasting.

For more information about the Council for Research Excellence, please visit:
<http://www.researchexcellence.com/>

#

CONTACT

Mark Braff
Braff Communications LLC
201-612-0707
mbraff@braffcommunications.com