

COUNCIL FOR RESEARCH EXCELLENCE UNVEILS FINDINGS FROM TWO STUDIES THAT HELP ANSWER THE QUESTION:

WHAT DOES IT MEAN TO WATCH TV IN TODAY'S MULTI-SCREEN WORLD?

New York, March 29, 2016 – The Council for Research Excellence (CRE) today unveiled findings from a pair of research studies designed to help answer the question of what it means to watch TV in today's multi-screen world. The two studies, one on concurrent platform usage and the other a longitudinal ethnography, were discussed in detail at an event in New York attended by senior media research professionals from networks, local stations, syndicators, advertisers and agencies.

"The CRE's mission is to help the research community better understand how audiences consume media as a means of improving research methodology and, in turn, the quality of audience measurement," said Billy McDowell, Vice President, Research for Raycom Media and Chair of the CRE. "These two new studies help us in our quest by tackling the complex issue of what exactly is meant by 'watching TV' in today's highly fragmented video media world."

Concurrent Platform Usage Study

"This study was designed as a deep dive into concurrent usage," said Janet Gallent, Senior Vice President of NBC Consumer Insights and Innovation Research, who oversaw the project as part of her role within the CRE's Media Consumption & Engagement Committee. "The study utilized both quantitative and qualitative methodologies to answer industry-relevant questions that have measurement implications."

Key insights and implications from the research study, which explored concurrent platform usage among six different media platforms (TV, computer, smartphone, audio, print, tablet/e-reader) include:

- Many people use media concurrently in a typical day but not for a long time.
 - 68% of the general population of P13+ use at least two media platforms concurrently in an average day.
 - Only 14% of the total media day is spent using two or more media platforms concurrently.
- The heaviest concurrent platform users account for the majority of the behavior.
 - Only one in five (19%) P13+ is a heavy concurrent user (defined as having six or more concurrent platform activities in an average day).
 - They account for 58% of all concurrent platform use in an average day.
- Smartphone users are especially likely to use this platform concurrently with another platform in an average day.
 - Radio/audio-only device users are least likely to use these media platforms concurrently with another platform in an average day.
- TV, computer and smartphone are especially likely to be used in combination with each other in an average day.

- These three combinations account for 55% of all concurrent time spent in an average day.
- Concurrent users intentionally configure media and content combinations to allow for desired levels of attention.

Passive metering of digital devices revealed that digital only concurrent behavior is relatively infrequent and comes in short bursts. Specifically, only 15% of online media consumers used their personal computer concurrently with either a smartphone or tablet in an average day. The vast majority (90%) of these digital concurrent users engaged in key concurrent activities less than twice a day. Of particular note is that the typical digital concurrence lasted about 30 seconds.

In-home and remote sessions revealed many reasons for concurrent platform usage, including the desire to feel productive and to foster togetherness. Behavioral observations of concurrent platform usage revealed that attention frequently shifts from one platform in response to content cues, sometimes outside of conscious awareness. Moreover, in-depth interviews with concurrent platform users uncovered the difficulty of identifying the “primary” media platform because it is not inherent in the device and changes with context as well as the user’s intentions.

Taken together, these findings also shed light on questions that need to be addressed in future research, specifically: How should concurrent use be measured? Should there be an attempt to measure attentiveness or primariness? How should concurrence and attentiveness be reported or integrated into audience data?

Conducted by GfK, the study encompassed three components, each providing insight to concurrent platform usage. Using GfK’s nationally representative KnowledgePanel®, CRE fielded a survey among 4,020 respondents age 13+ which included a sample of 1,066 Hispanics, to measure behaviors across various consumer segments. A passive digital metering component tracked 310 participants and enabled researchers to explore which digital platforms are being consumed concurrently. And a user experience (UX) component consisting of 90 sessions allowed researchers to study the motivations behind the previously quantified behaviors, as well as to explore the impact of concurrent platform usage on consumers’ experiences with program content and advertising.

Longitudinal Ethnography

The ethnography sought to understand the impacts of internet technology and video platform proliferation on video viewing practices from a cultural perspective. The qualitative findings will help inform the development of strategies for future audience measurement.

The study found that:

- The concept of "attention" is a complicated one. Attention is not necessarily correlated with presence and it is impacted by many factors, including multi-screen usage. In some cases, lack of attention might not even correlate to lack of engagement, as in a case where a viewer is using a second screen to look up information about the show being watched.

- Change in viewing habits and device usage occurs gradually but rarely results in drastic, long-lasting shifts in overall time spent viewing.
- TV remains king. Even with the proliferation of second and third screens, the TV is almost always the preferred viewing device, regardless of demographics. Viewers prefer the TV for its size, quality of picture and sound, and, commonly, its location in parts of the home that are more comfortable for viewing.
- Viewers tend to seek a streamlined experience.
- Even though there is a desire to streamline, there are factors that can trump consolidation of devices and services. Ease of use, convenience and quality are more important than the desire to consolidate. A smart TV with a Netflix button on the remote, for example, rapidly increases adoption because of its convenience and ease of use.

Implications for measurement were divided into three categories: technical, environmental and philosophical.

Technical issues pertaining to measurement include:

- How can measurement methods be future-capable by anticipating new modes of delivery such as 4k?
- How can research identify all content being viewed?
- How all can media on mobile devices be measured, regardless of in app or out?
- In the event of concurrent media usage, how can attention be measured across multiple devices?

Environmental issues include:

- How can measurement accommodate the fact that, in a group setting, individuals' presence, attention and screens might be highly dynamic?
- How can group viewing/listening on digital devices be measured?
- How can measures ensure that an audience is unduplicated, in light of the fact that individuals view the same content across platforms?
- The need to develop a robust set of use cases to account for myriad viewing scenarios.

Philosophical issues identified were:

- The TV set is still the king: the highest priority should always be to measure all TV viewing.
- The need to move toward measures that are people-based and to stop "chasing devices."
- How will viewer behavior -- such as attention -- be modeled?
- What is a viewer/listener, i.e., should there be factors such as attention, engagement, viewing and listening attached to audience numbers?

The in-person ethnography was conducted by GfK User Experience and Media researchers to observe viewing behaviors as they occurred, as well as to probe further into specific behaviors. The study tracked a national sample of 100 households from November 2013 through October 2015. The households were selected to represent a balance of urban, suburban and rural characteristics nationwide. Digital ethnography allowed researchers to gain insight into viewing behaviors over time; all households

were given a personal smart-device serving as a “participant toolkit” including a camera and co-discovery tool with study-specific apps to enable self-reporting.

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 representing advertisers, agencies, broadcast networks, cable, syndicators, local stations and industry associations. CRE members represent advertising agencies, media buying firms, media companies, advertisers, digital publishers, social media companies and industry organizations including ABC, AMC Networks, Annelect, CBS, Cox Media Group, CoxRep, Discovery Communications, ESPN, Greater Media, Havas Media, ITN Networks, Katz Media Group, LIN Media, Magna Global, Media Rating Council, NBC Universal, Nielsen, Radio Advertising Bureau, Raycom Media, Scripps Networks Interactive, Simulmedia, Tribune Co., Turner Broadcasting, TVB, 20th Television, Twitter, Univision Communications, Viacom Entertainment Group and Weigel Broadcasting.

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