



Evaluating Engagement & Recall by Platform

June 29, 2016



SPEAKERS



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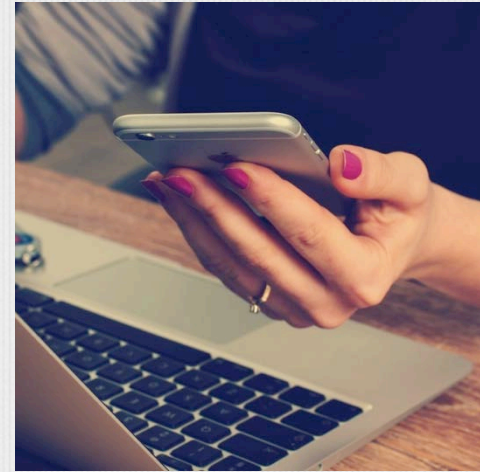
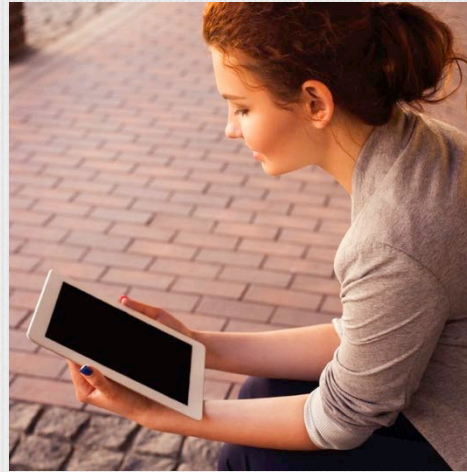
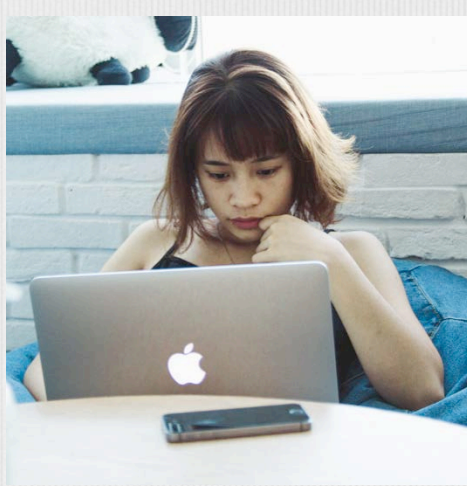


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TODAY'S BIG QUESTION

Does platform affect viewer engagement and recall?



AGENDA

- > **Goals**
- > **Methods**
- > **Key Findings**
- > **Differences By Platform**
- > **Multi-Tasking**
- > **Implications**
- > **About the CRE**

OUR GOALS

Compare viewing of TV shows and advertising across screens to:

- 1. Explore the Experience**
Do engagement and recall differ across platforms?
- 2. Identify the Drivers**
What has the greatest impact on the viewing experience?
- 3. Consider Implications**
What are the best strategies to ascribe value to each platform?

Hub Entertainment Research conducted an online study



RECRUITMENT

- > Nationwide 16-54 sample, targeted platform and shows



WATCH SHOW










- > Respondents watched one show on one targeted platform
- > Show content and ads identical across platforms



SURVEY

- > 15 minute online post-viewing survey
- > Self-reported measures of enjoyment, attention and emotional response
- > Measures of show and ad recall utilizing questions provided by Nielsen Brand Effect
- > Sample weighted for show, age, and gender
- > Fielded October 9-15, 2015

Sample Size: The shows were chosen to capture a mix of viewer and platform segments

					
	TV	Computer	Tablet	Phone	Total
	90	117	104	96	407
	103	103	100	106	412
	92	125	110	108	435
	160	72	73	58	363
	84	85	81	101	351
	529	502	468	469	1,968



THE BIG PICTURE

Key Findings

KEY FINDINGS



- > Program engagement and enjoyment showed little to no difference by platform



- > Ad engagement and recall are similar for all digital platforms, but higher among those watching a TV set



- > The TV platform is associated with greater ad engagement and recall, independent of other factors



- > Multi-tasking negatively impacts engagement with ads, but not with show—and only with online/digital multi-tasking



WHERE PLATFORM DOES NOT MATTER

Platform has little to no association with engagement and recall related to show content

The findings show little to no relationship between platform and...

SHOW ENJOYMENT

- > How much viewers enjoyed the show



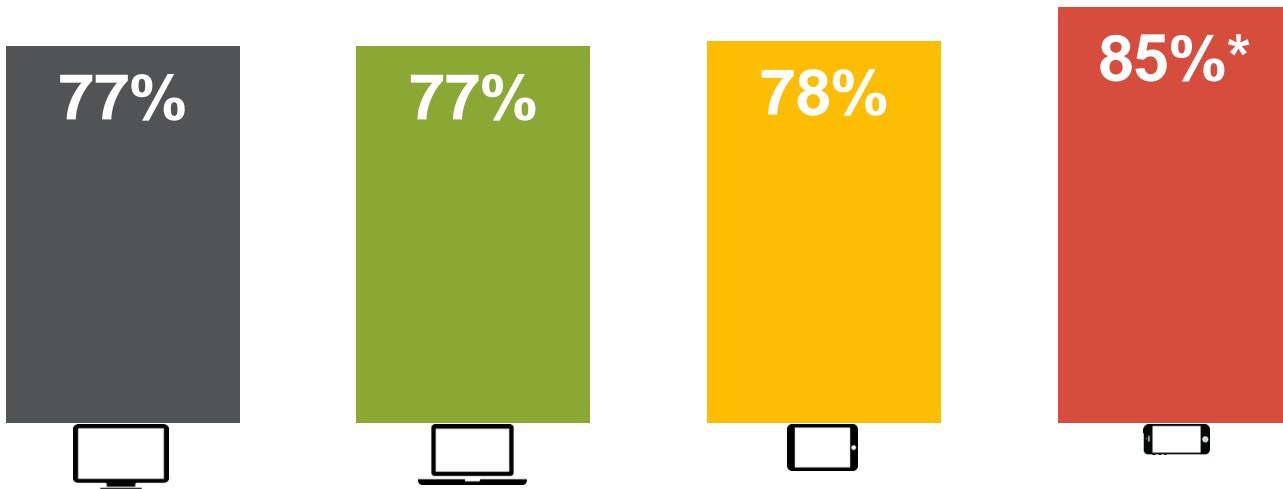
SHOW ENGAGEMENT

- > Specific emotions associated with the show
- > Self-reported level of attention paid to the show
- > How much of the show they paid attention to
- > Ability to recall specific plot points

SHOW ENJOYMENT

Enjoyment was high for all platforms, higher for phone viewers

How does platform influence enjoyment of the show itself?
Scored 8-10 (10 = highest level)



*Significantly different.

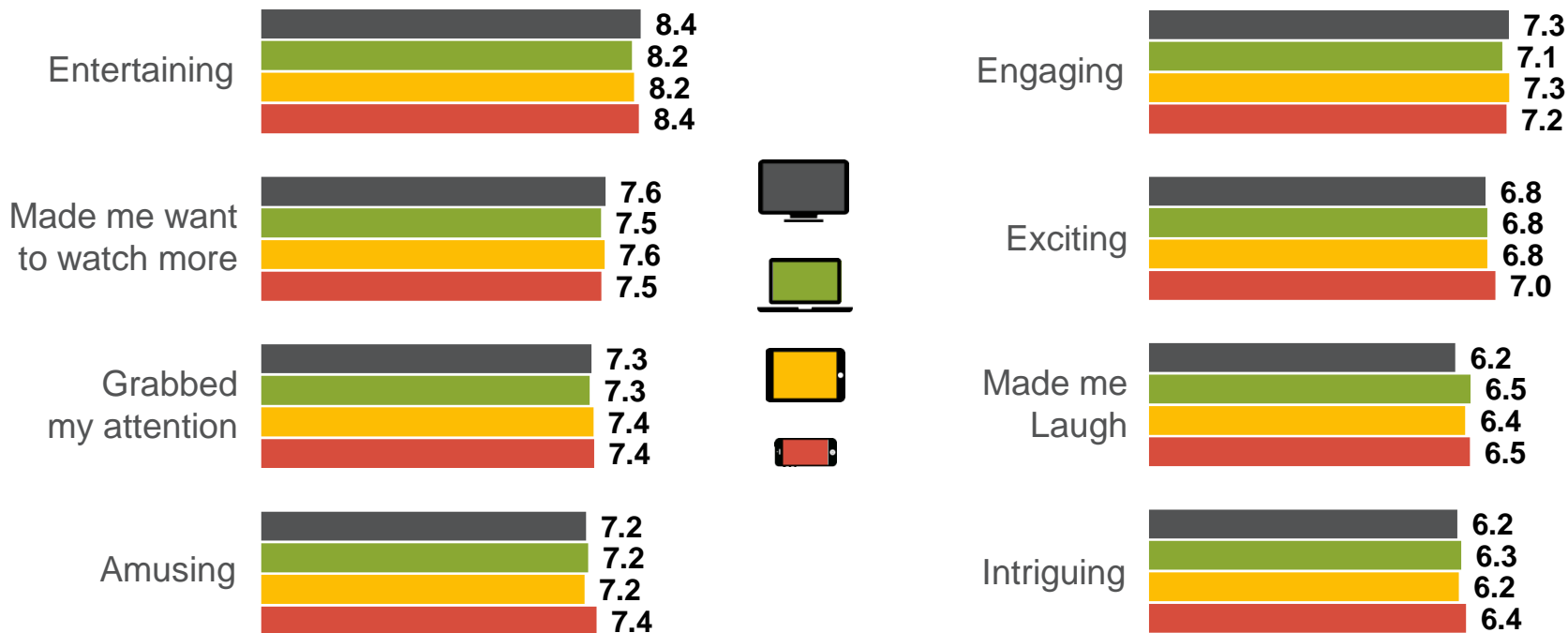
QF3A: On a scale of 0 to 10, where 0 means you didn't enjoy the show at all and 10 means you enjoyed the show a lot, how much would you say you enjoyed this episode of SHOW?

SHOW ENGAGEMENT

Emotional reactions showed little difference by platform

How does the viewing experience differ by platform?

Mean score by attribute/platform





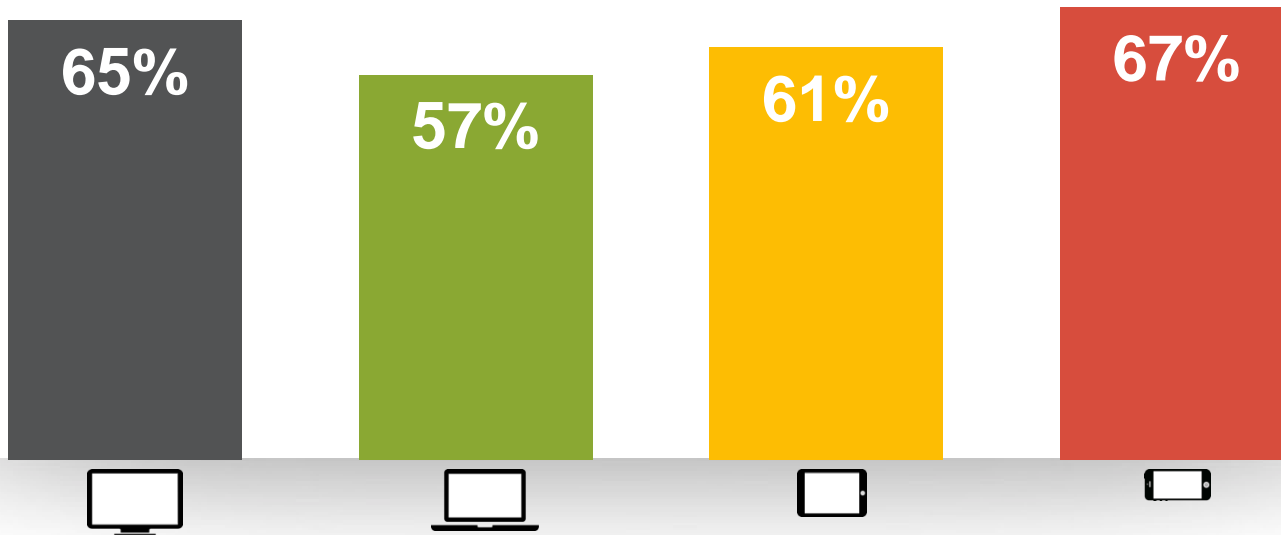
SHOW ENGAGEMENT

TV and phone viewers were more likely to pay attention to “all” of the show

But differences were directional, not significant

How much of the show did you pay attention to?

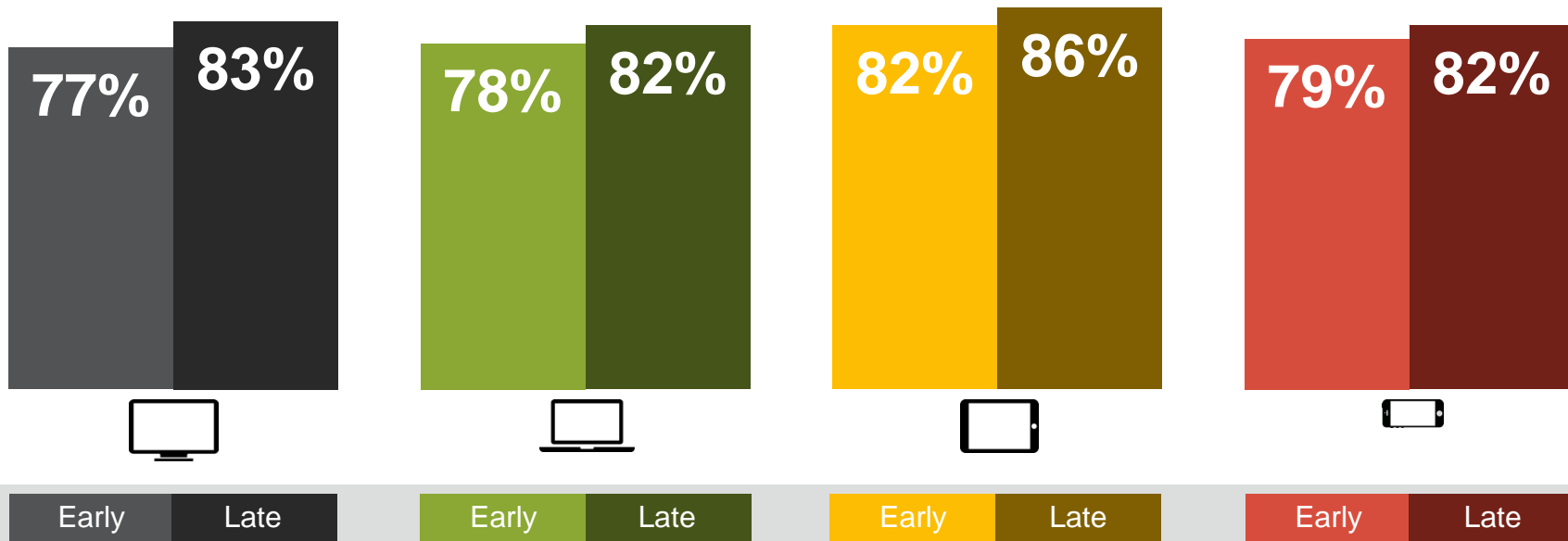
Percent answering “all of it”



SHOW ENGAGEMENT

Plot point recall, using Nielsen Brand Effect questions, nearly identical by platform

On which platform do viewers engage best with the plot?
Percent that correctly identify plot points





WHERE PLATFORM DOES MATTER

Platform matters in areas of audience measurement important to the TV and advertiser communities

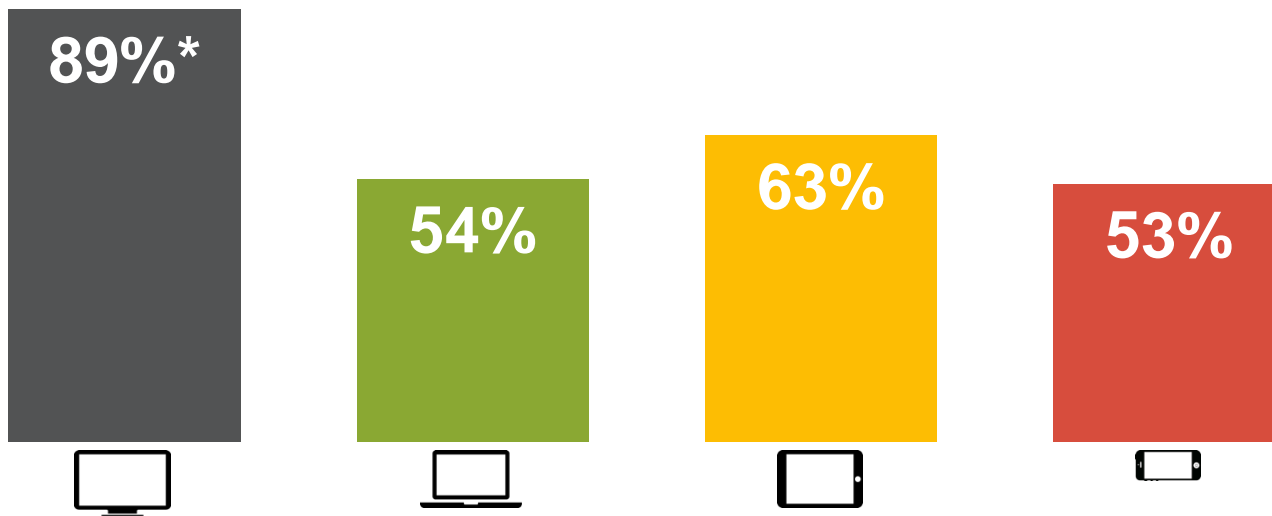
PLATFORM EXPERIENCE

TV participants had a much more positive viewing experience than others

Tablet viewers ranked a distant second

How was the overall experience of watching on the platform?

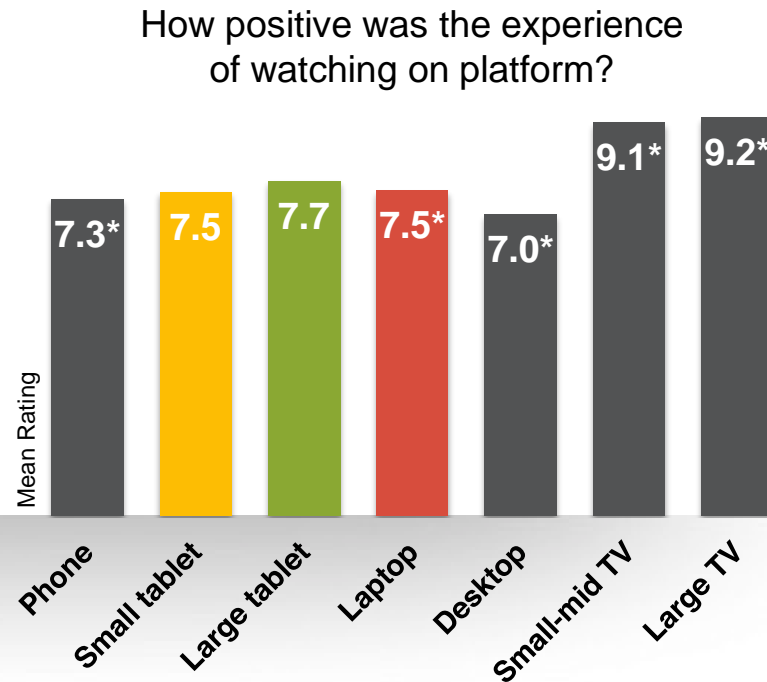
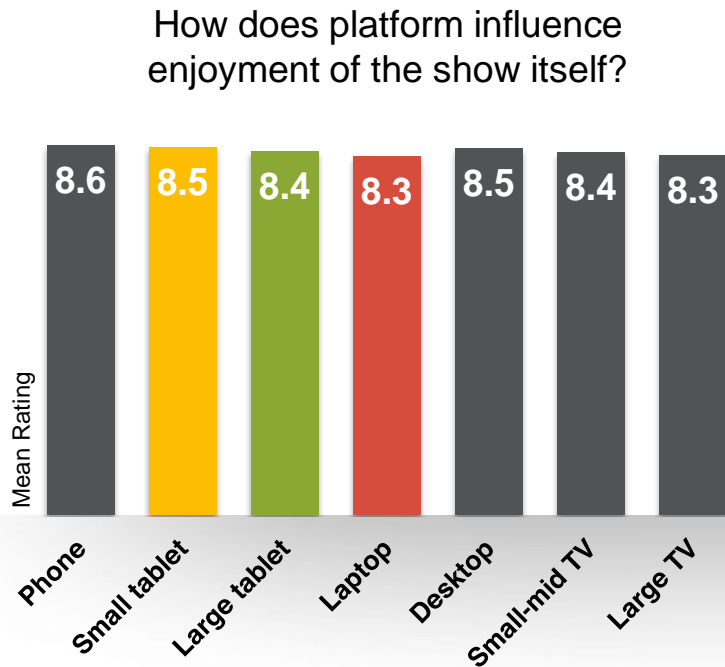
Percent scored 8-10 (10 = most positive)



*Significantly different. QF4C: QF3B: And on a scale of 0 to 10, where 0 means very negative and 10 means very positive, how would you rate the experience of watching the episode on a [platform]?

PLATFORM EXPERIENCE

Unlike show enjoyment, platform enjoyment is related to actual screen size



*Significantly different.

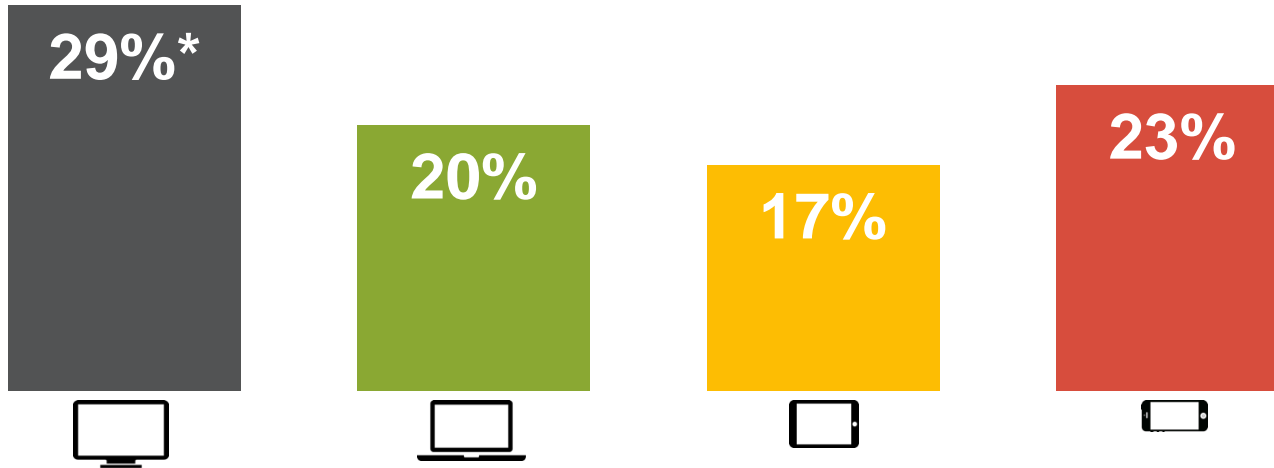
QF3A: On a scale of 0 to 10, where 0 means you didn't enjoy the show at all and 10 means you enjoyed the show a lot, how much would you say you enjoyed this episode of SHOW?

QF3B: And on a scale of 0 to 10, where 0 means very negative and 10 means very positive, how would you rate the experience of watching the episode on a [platform]?

AD/BRAND ENGAGEMENT (self reported)

TV viewers were most likely to pay attention to ads, phone viewers ranked second

On which platform do viewers perceive greatest attention to ads?
Percent scored 8-10 (10 = highest level)



*Significantly different. QF5A: Now we have some questions about the commercials in the show. Using a 0 to 10 scale, where 0 means no attention and 10 means complete attention, how much attention did you pay to the commercials during the show in general?

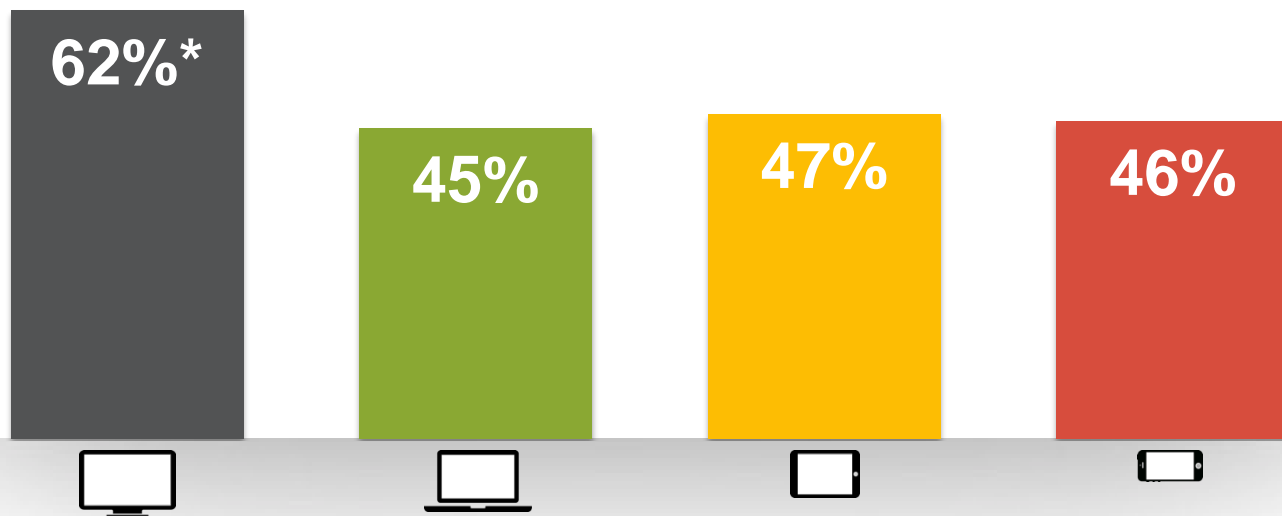
AD/BRAND ENGAGEMENT

TV viewers were most successful at recalling brands

Total of 38 national ads tested across the five shows

On which platform are viewers most likely to recall sponsors?

Percent who correctly recall half or more of advertisers



*Significantly different. QF5H: During the show, did you see commercials for any of these brands/products?

AD/BRAND ENGAGEMENT

The strength of television extends to other diagnostics of ad engagement

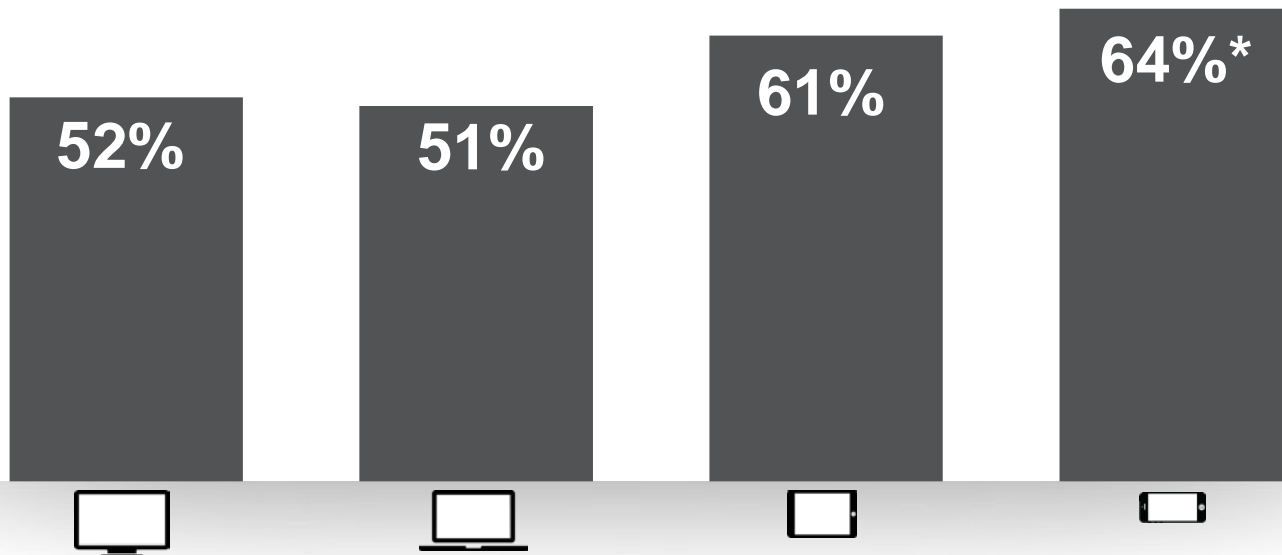
TV viewers more likely to

- > Recall a higher percentage of advertisers
- > Identify plot points within the advertising
- > Identify the brands within the advertising



**Most say the acceptable number of ads is the same regardless of device.
TV and computer viewers are more divided than tablet and phone viewers.**

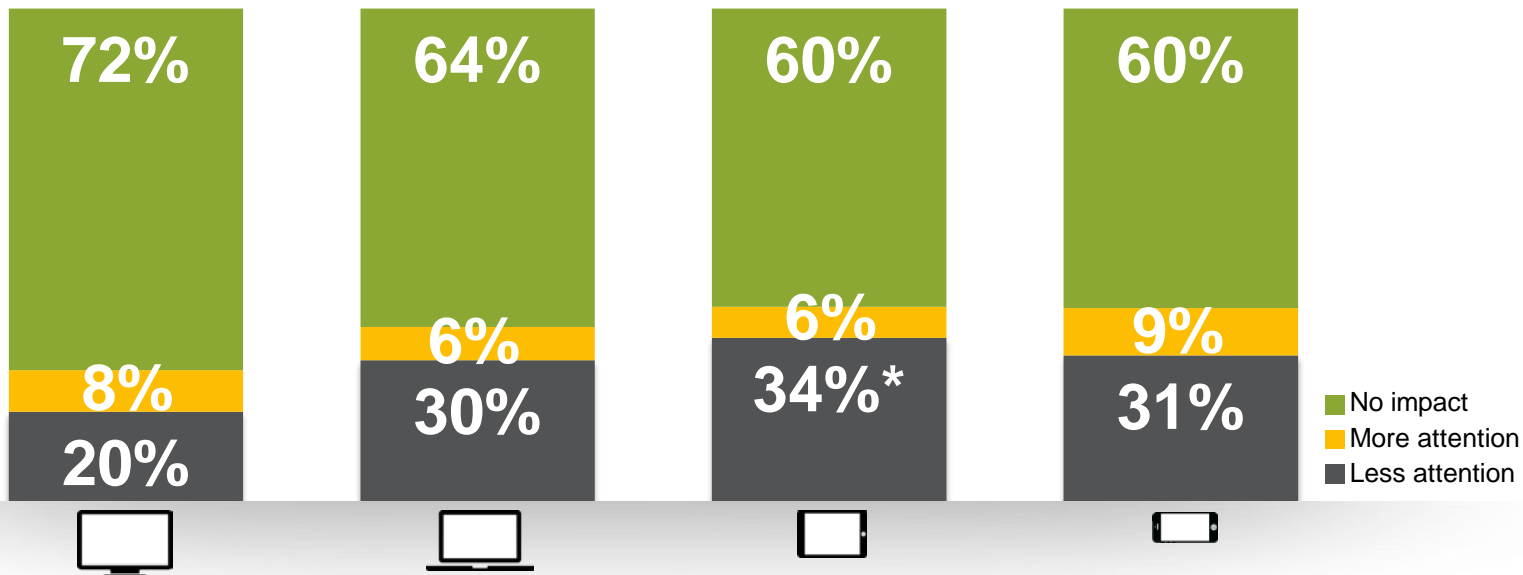
Percent saying number of acceptable ads is same across devices



*Significantly higher than total. QF5L: In general, would you say that the number of commercials you find acceptable during a TV show is different or the same by device?

Digital viewers were somewhat more likely to perceive that ad load affected attention to show... but they were just as likely to recall plot points

Impact of numbers of commercials on attention to show, by platform





MULTI-TASKING

A force to be reckoned with



We captured other tasks viewers engaged in during the show and commercial breaks



face-to-face
conversation



telephone
conversation



texted
or IM'd



social media



browsed
websites



read or
wrote emails



job-related
work



household
related tasks



went to
another room



eating



read news
or book

We captured other tasks viewers engaged in during the show and commercial breaks

DIGITAL MULTI-TASKING



face-to-face
conversation



telephone
conversation



texted
or IM'd



social media



browsed
websites



read or
wrote emails



job-related
work



household
related tasks



went to
another room



eating



read news
or book

We captured other tasks viewers engaged in during the show and commercial breaks

ANALOG MULTI-TASKING



face-to-face
conversation



telephone
conversation



texted
or IM'd



social media



browsed
websites



read or
wrote emails



job-related
work



household
related tasks



went to
another room



eating



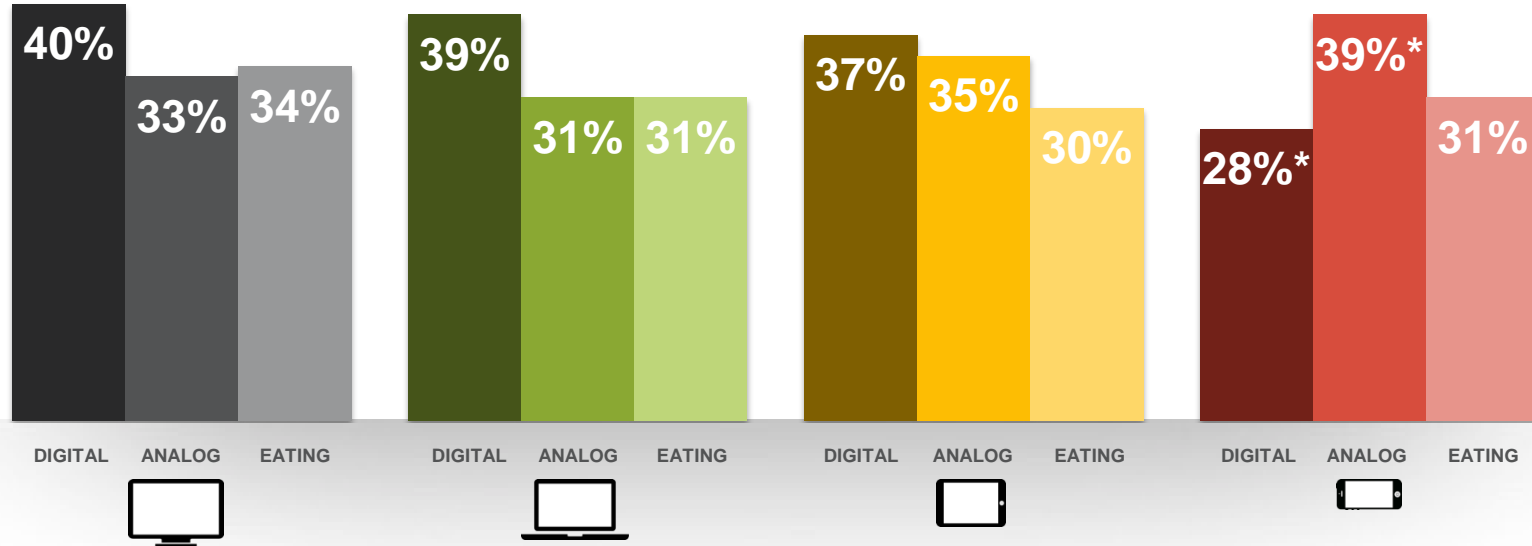
read news
or book

MULTI-TASKING DURING SHOW

Digital multi-tasking was most common across platforms

The exception: Phone viewers were more likely to analog multi-task

Any multi-tasking during show

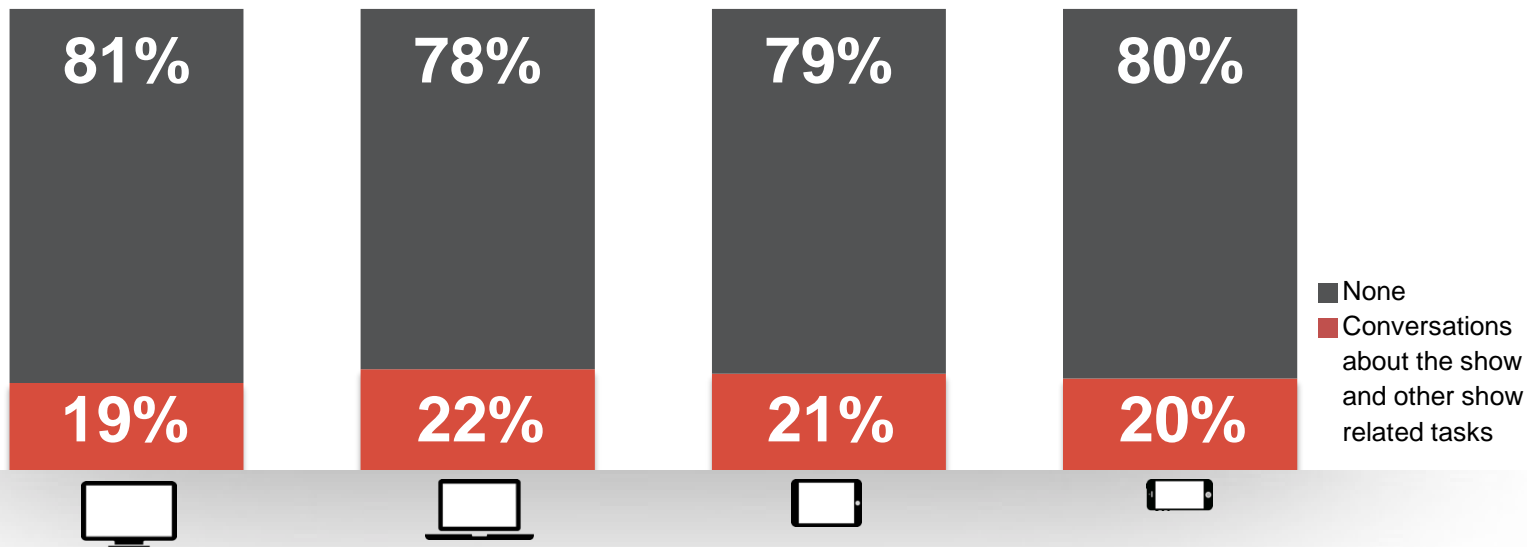


*Significantly different. QF4D: Did you do any of the following without pausing the show?

MULTI-TASKING DURING SHOW

One in five said their multi-tasking during the show was show related

Was multi-tasking during show about the show?

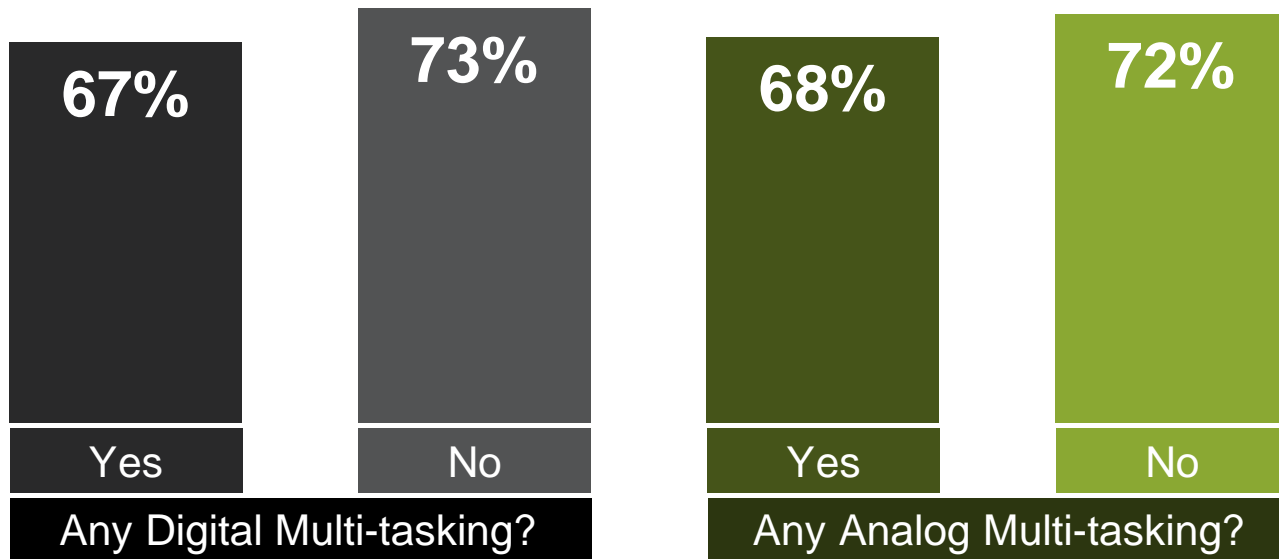


MULTI-TASKING DURING SHOW

Multi-tasking had no significant impact on plot recall

Whether digital or analog, those who multi-tasked were only slightly less successful in identifying plot points

Percent correctly identifying both plot points during show:
Multi-taskers vs. Non Multi-taskers

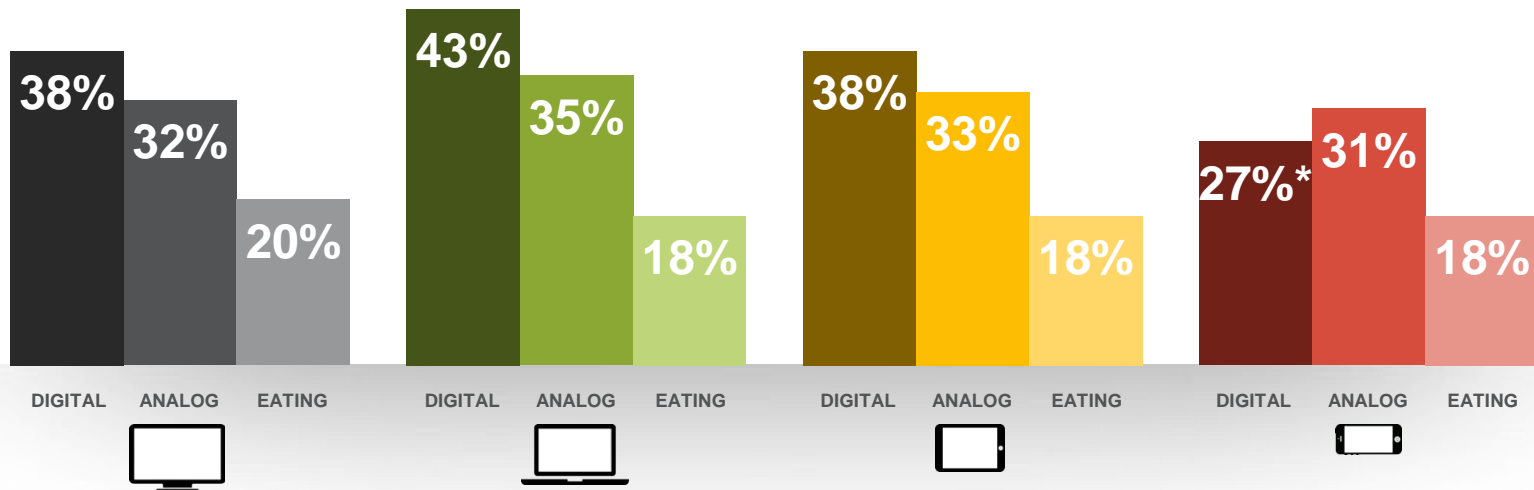


MULTI-TASKING DURING ADS

With one exception, multi-tasking was no higher during ads than shows

The exception: Computer viewers – 4 points more likely to digitally multi-task, 4 points more likely to analog multi-task during ads

Multi-tasking done during commercial breaks:
Percent doing any

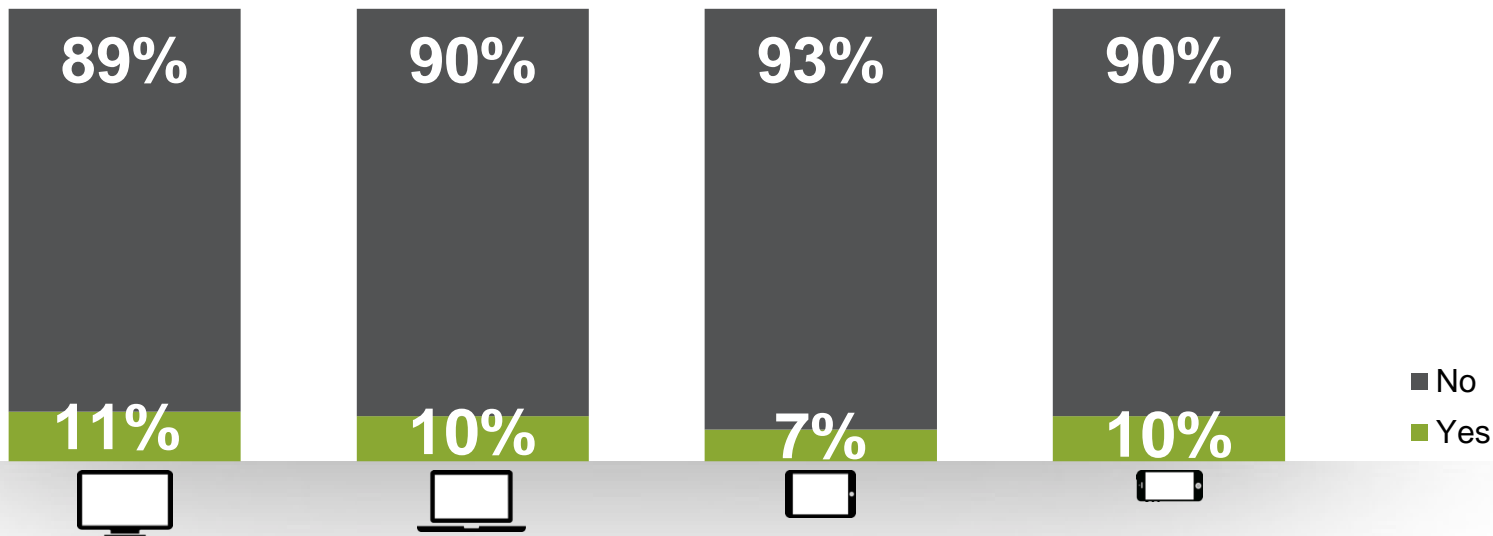


MULTI-TASKING DURING ADS

Very little multi-tasking behavior during ads was related to the brands

The results did not differ by platform

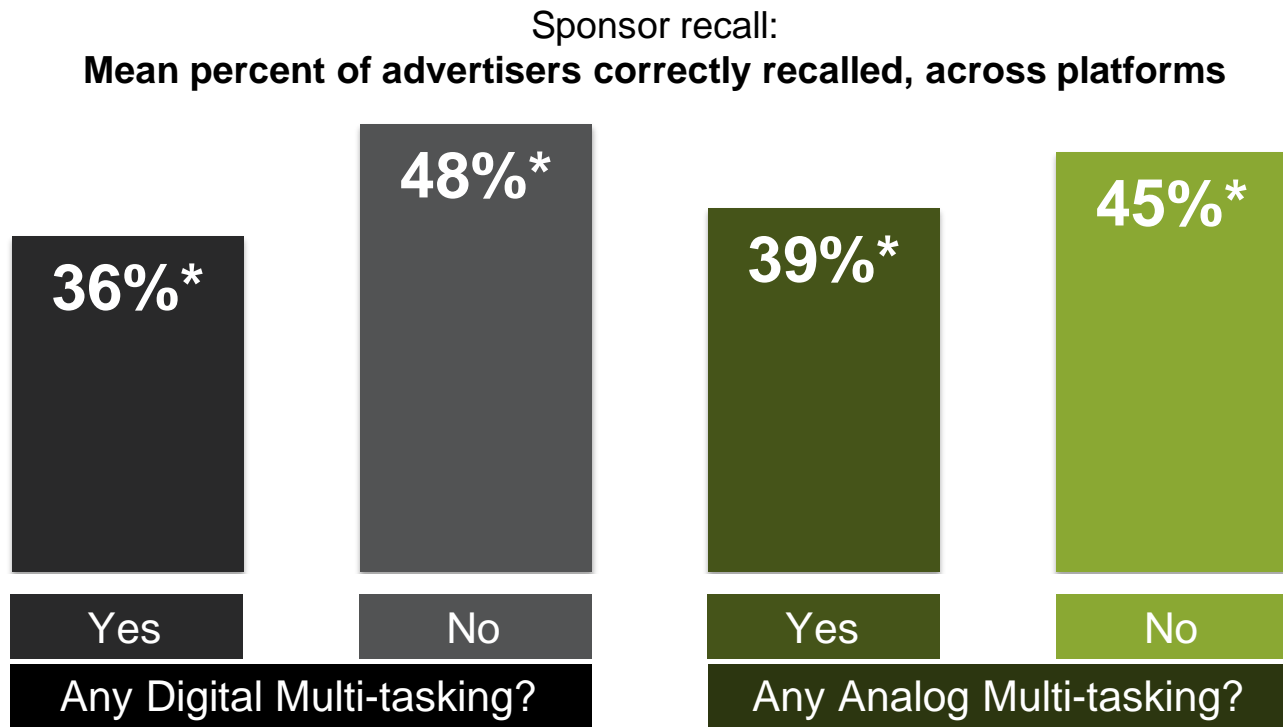
Was multi-tasking during ads about the brands?





MULTI-TASKING DURING ADS

Across platforms, multi-tasking had a negative impact on sponsor recall





IMPLICATIONS

What the findings mean

MARKETPLACE IMPLICATIONS

FINDING

IMPLICATION

SHOWS

Good content translates equally
across platforms

Continue to create great shows and
consumers will enjoy and engage, regardless



council for research excellence

ABOUT THE CRE

The Council for Research Excellence is a body of senior research professionals, formed in 2005 to identify important questions about audience measurement methodology and to find, through quality research, the answers to those questions.

The Council provides the Nielsen client community a means to undertake research projects no one company could undertake on its own.



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CURRENT CRE RESEARCH

- > **Concurrent Platform Usage**
- > **Platform Evaluation**
- > **TV Audio Diary**
- > **Data Validation White Paper**
- > **Neurometrics of Viewing**
- > **Online Target Authentication**
- > **Device Bias**

CRE is currently in the field replicating this research with additional variables



Ad Load

Ad Placement

Fast Forward

Short Form Programs

Spanish Language
Programming



WHAT IS IT TO WATCH TV? PART II

Results will be presented on September 8, 2016





**To join CRE or a committee, contact us at
info@researchexcellence.com**



 **THANK YOU**



Q&A



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info@researchexcellence.com**



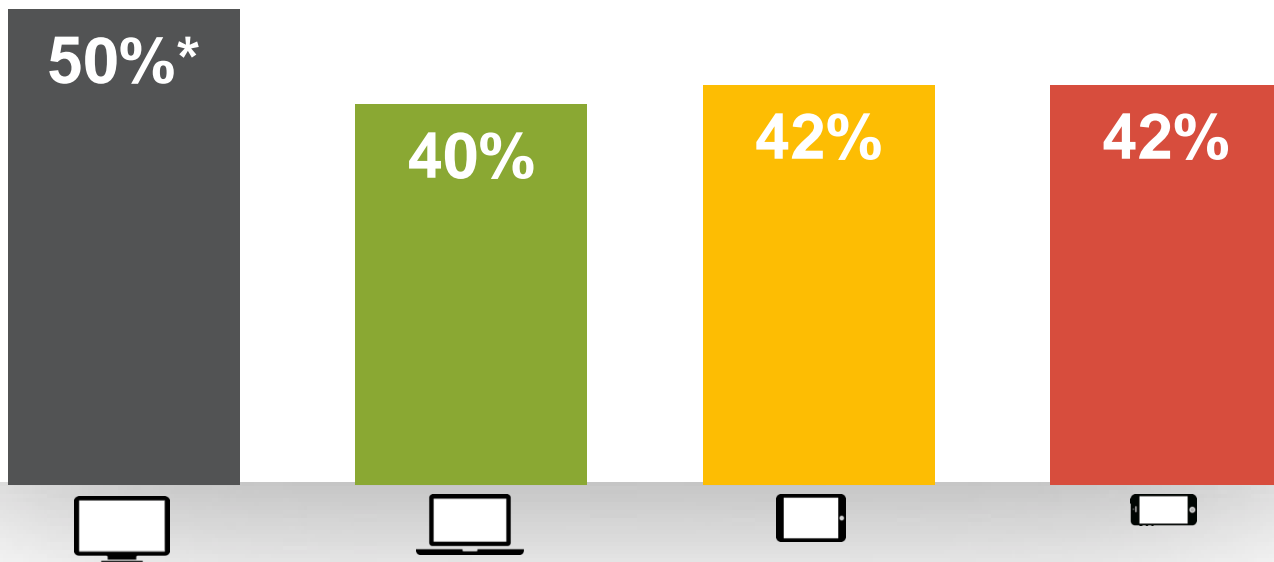
APPENDIX

AD/BRAND ENGAGEMENT

TV comes out highest when looking at recall by percent of sponsors correctly identified

On which platform are viewers most likely to recall sponsors?

Mean percent of advertisers correctly recalled



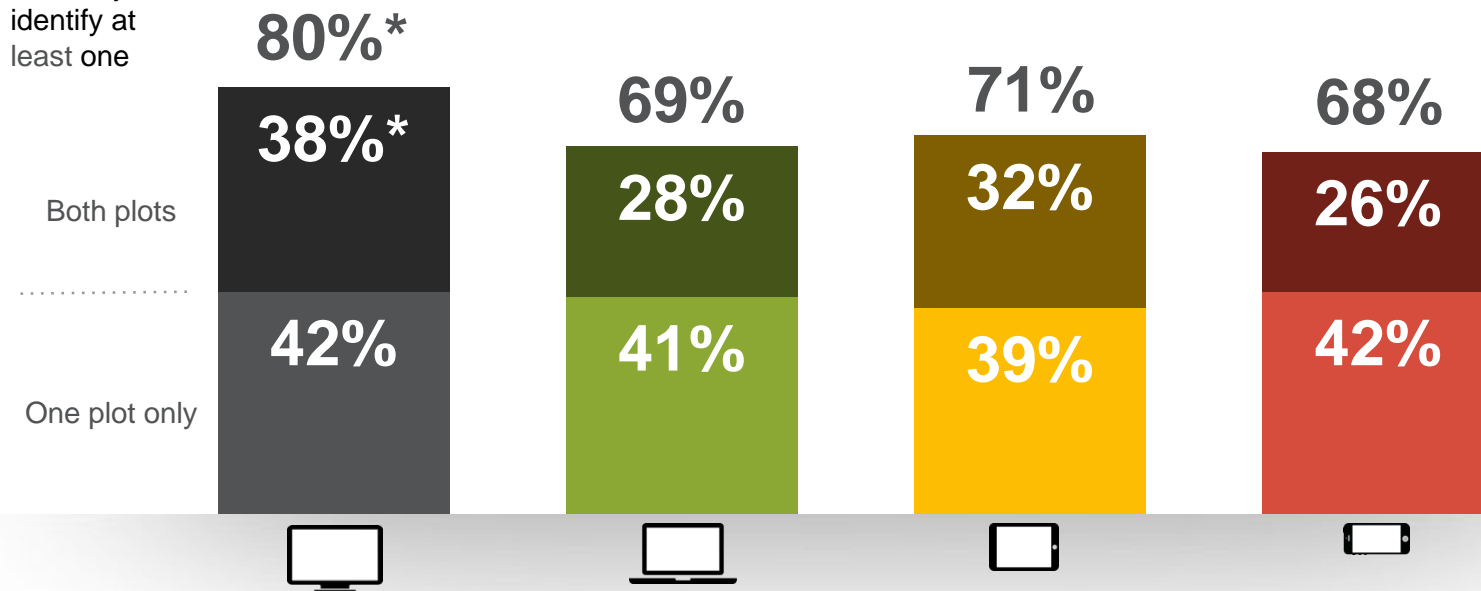
*Significantly higher than total. QF5H: During the show, did you see commercials for any of these brands/products?

AD/BRAND ENGAGEMENT

TV viewers were also best able to identify plot points in one or both ads tested

On which platform can viewers best identify creative elements of advertising they saw?

Correctly
identify at
least one



*Significantly higher than total. QF51: We're now going to ask you if you can remember things that happened during certain commercials.

AD/BRAND ENGAGEMENT

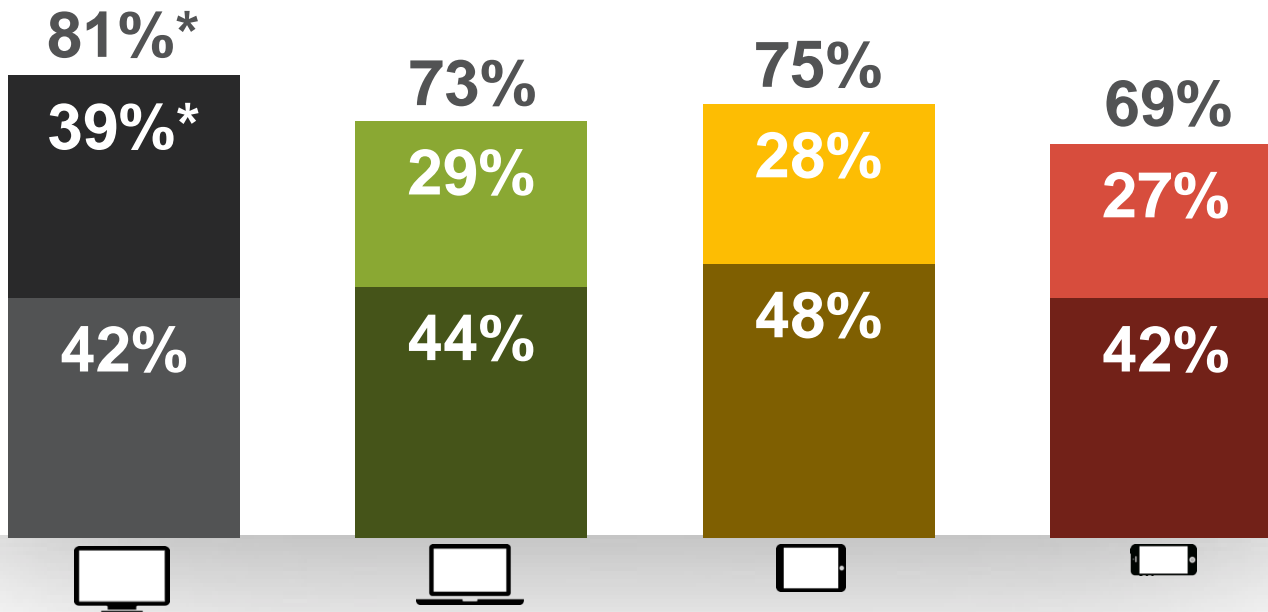
TV viewers were most likely to correctly ID the brands in the ads we asked about

On which platform can viewers best identify brands associated with the advertising they saw?

Correctly
identify at
least one

Both brands

One brand



*Significantly higher than total. QF51: What was this a commercial for?



CONFIRMATION

Multivariate analysis to diagnose differences observed by screen

Our analyses included a wide variety of factors that might have influenced engagement and recall

Platform <ul style="list-style-type: none">• TV• Computer• Tablet• Phone	Show <ul style="list-style-type: none">• Specific show watched• Half hour vs. an hour	Video <ul style="list-style-type: none">• Screen size• HD vs. SD	Setting <ul style="list-style-type: none">• At home vs. out• Room• Time of day	
With Whom <ul style="list-style-type: none">• Number of people in the room• Number of co-viewers	Multi-tasking <ul style="list-style-type: none">• Digital (texting, social media)• Analog (conversations, chores), eating and viewing	Physical Position <ul style="list-style-type: none">• Sitting vs. lying down	Mood <ul style="list-style-type: none">• Alert vs. distracted• Comfortable vs. stressed	Features Used <ul style="list-style-type: none">• Paused show• Rewound
Role of TV <ul style="list-style-type: none">• Hours per week• Importance of TV as entertainment	Tech Comfort <ul style="list-style-type: none">• Frequency of viewing on each platform• Adoption of technology overall	Brand Ties <ul style="list-style-type: none">• Use of brands featured in ads we tested	Demos <ul style="list-style-type: none">• Gender• Age• Education	

The results confirm a statistically significant relationship between watching on a TV and several key measures of engagement

STRONGEST RELATIONSHIPS WITH...

	POSITIVE VIEWING EXPERIENCE	ATTENTION PAID TO ADVERTISING	BRAND RECALL	TOTAL AD ENGAGEMENT (combined index)
1	Watched on a TV set	No digital multi-tasking	No digital multi-tasking	No digital multi-tasking

MEASUREMENT IMPLICATIONS

FINDING

IMPLICATION

EXPERIENCE	Screen size appears to matter, with larger TV screens providing a better viewing experience, potentially impacting attentiveness and engagement in advertising	Consider incorporating experience-related measures to existing Nielsen research to track changes over time
AD METRICS	TV holds advantage vs. digital platforms in converting from opportunity-to-see to measures of ad engagement and ad recall	Consider using Brand Effect as platform to develop metrics measuring conversion ratios by platform
AD LOAD	Although most accept a full ad load across platforms, digital viewers were somewhat more likely to say ad load reduced attention to the show	Explore effects of ad load on engagement and attentiveness for digital platforms

MEDIA CONSUMPTION & ENGAGEMENT COMMITTEE

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> Joanne Burns

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> Janice Finkel-Greene

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