



Video Consumer Mapping Study

Additional Data Mining

The question asked by many:

**“What do viewers do
during commercials?”**



Nielsen data has documented most viewers do not change channels during commercial breaks.

Using observational research, the “*Video Consumer Mapping Study*” (VCM) study explored to what extent viewers do or do not pay attention during programs and ad/promotion breaks.

The findings from this study are enlightening and to some, might be somewhat surprising.

Source: The “*Video Consumer Mapping Study*” observed 376 adults 18+, in two phases, during 2008. All data reported is based on live³ viewing only.



**TV advertising and program promotions daily reach
85% of all adults and total 73 minutes of viewing.**

of Ads/promo pods viewed DAILY

26.3 pods

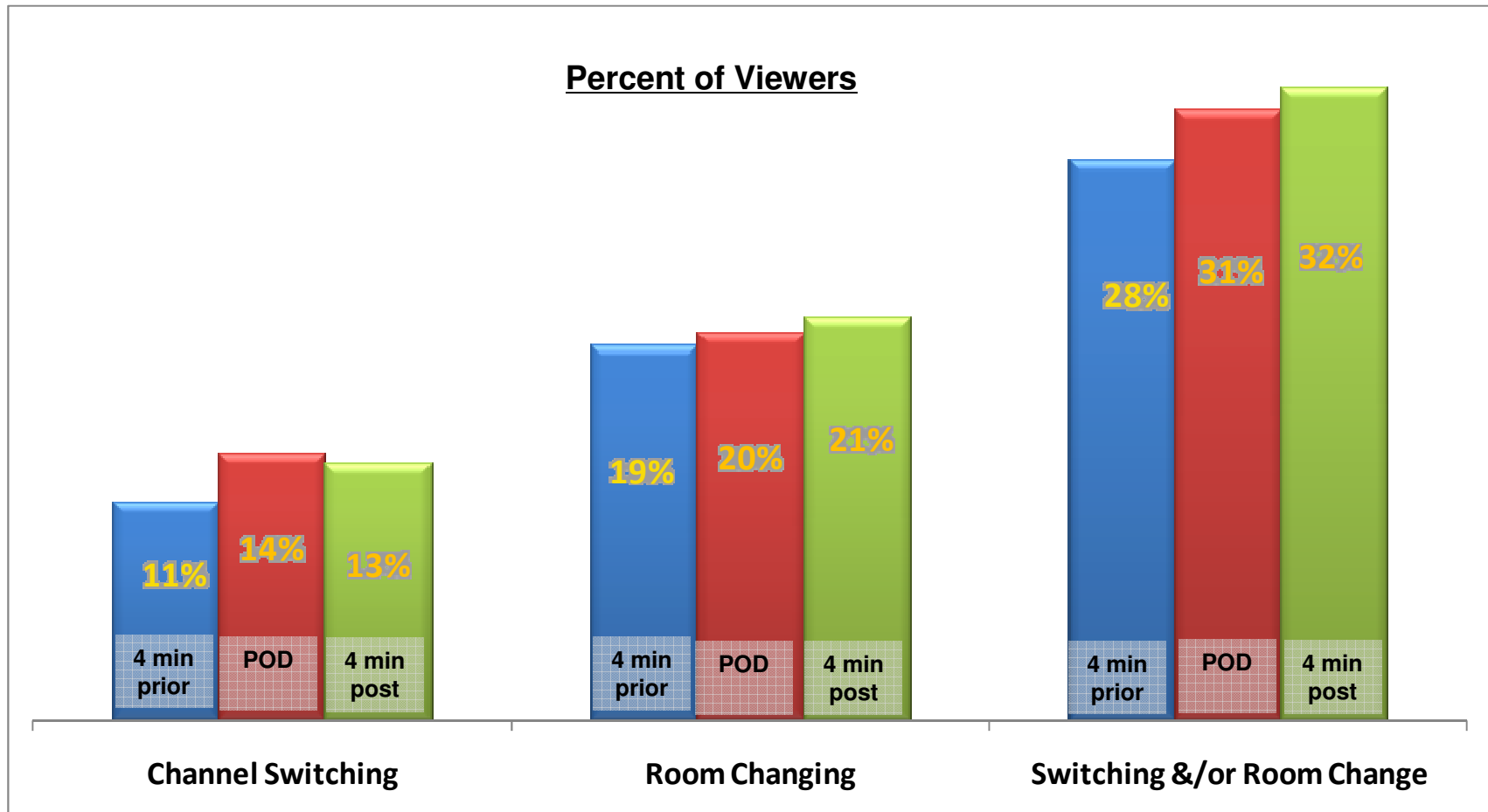


Average length of ad/promo pods viewed

2 minutes 46 seconds



The amount of channel switching and/or room changing during ad/promo pods and during programming is very similar

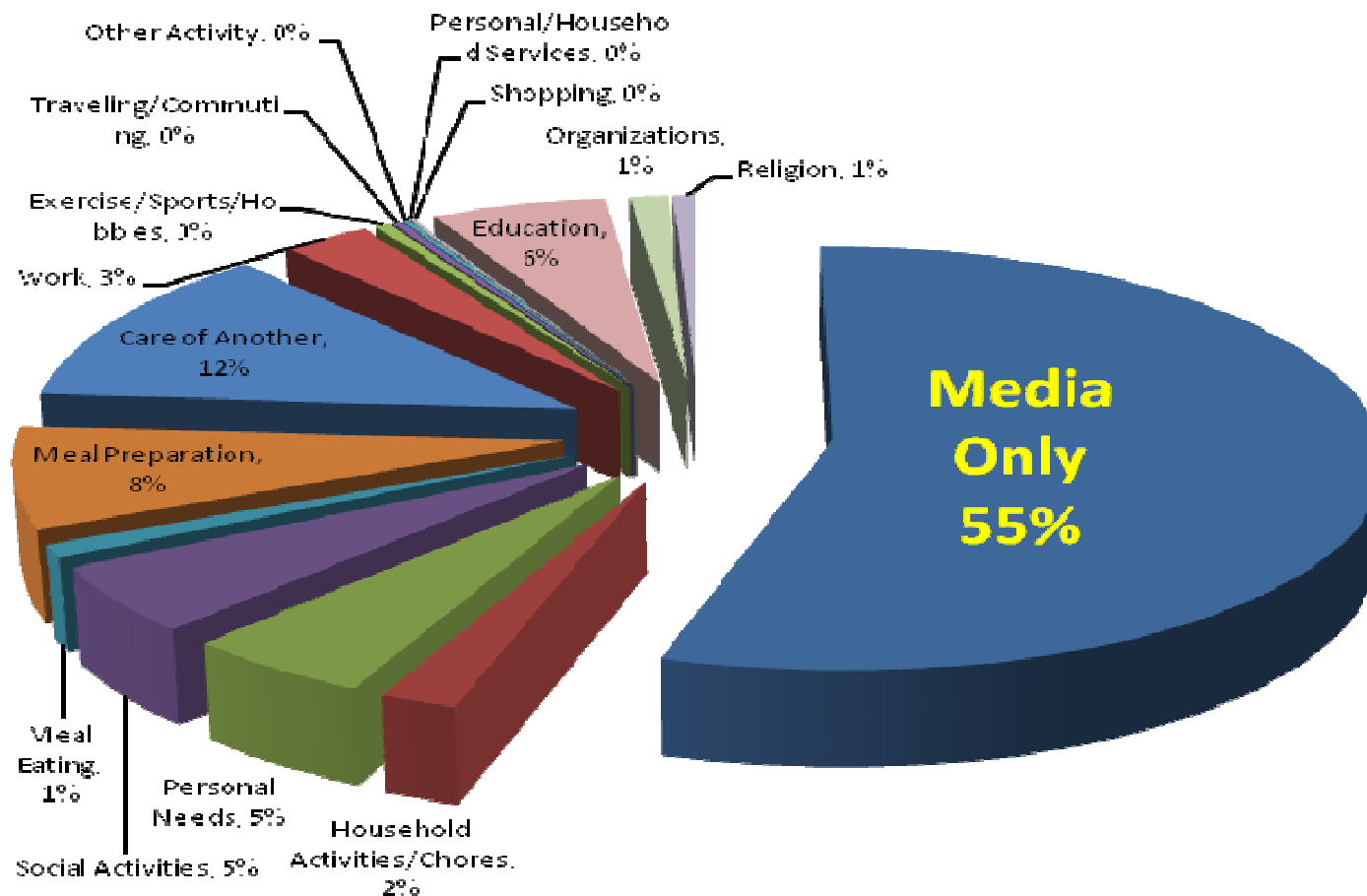


4 Minute Periods: Prior to onset of commercial/promo pod, beginning with onset of commercial/promo pods and the next 4 minutes following the commercial/promo pod

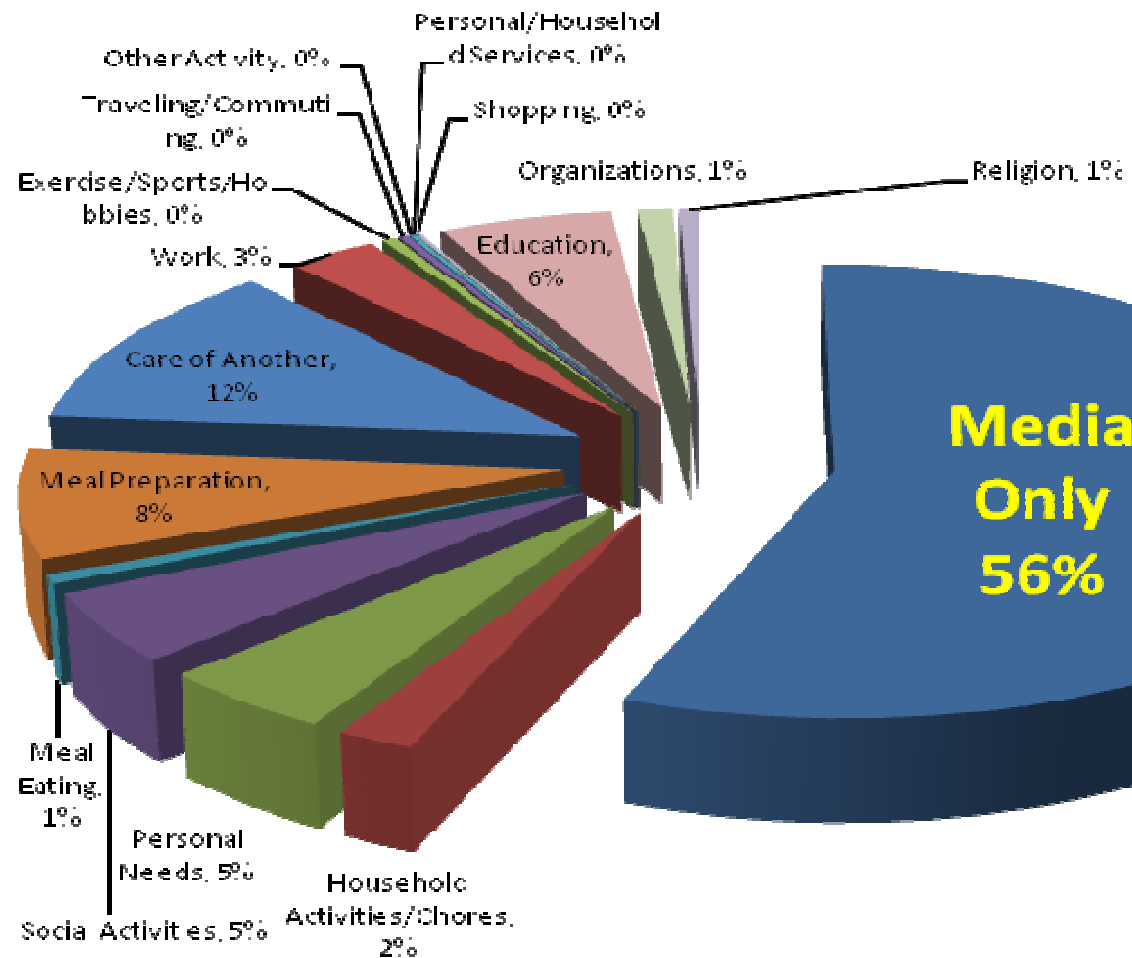
Note: Viewers in the room when someone else changes channels/channel surfs is counted as having changed channels.



Activity Two Minutes Prior to Onset of a Commercial Break



Activity Two Minutes After the Onset of a Commercial Break

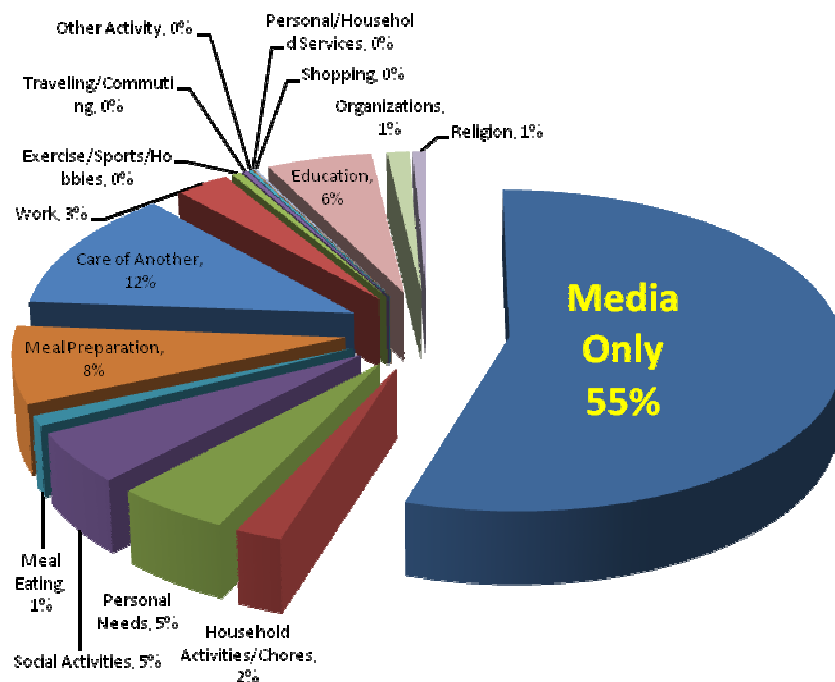


Very few viewers change their activities during commercials

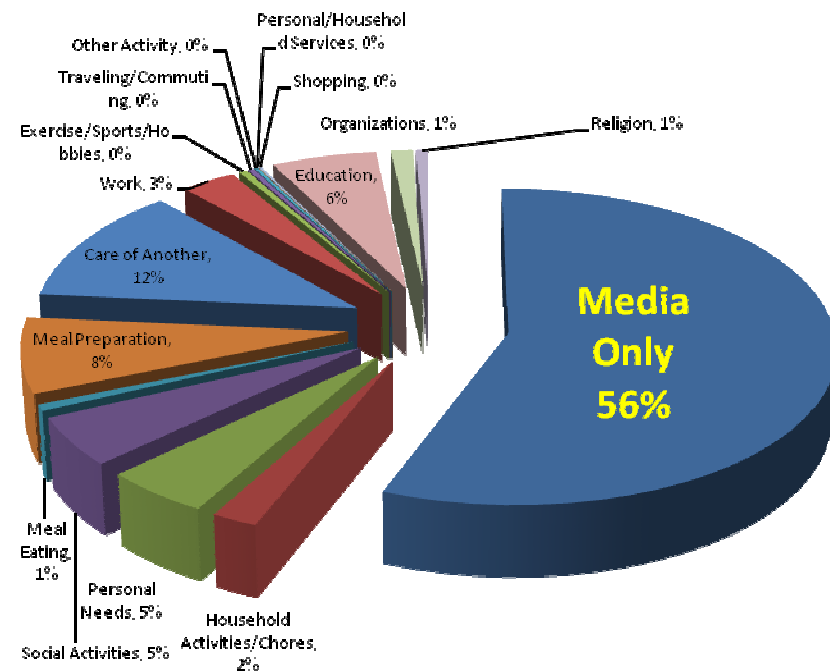
Concurrent activities during viewing of Programming and Ad/Promo pods are strikingly similar.
Behavior does not change for most viewers at the onset of Ad/Promo pods.

Share of TV viewers' activities the two minutes preceding and following the onset of a commercial pod

Preceding ...



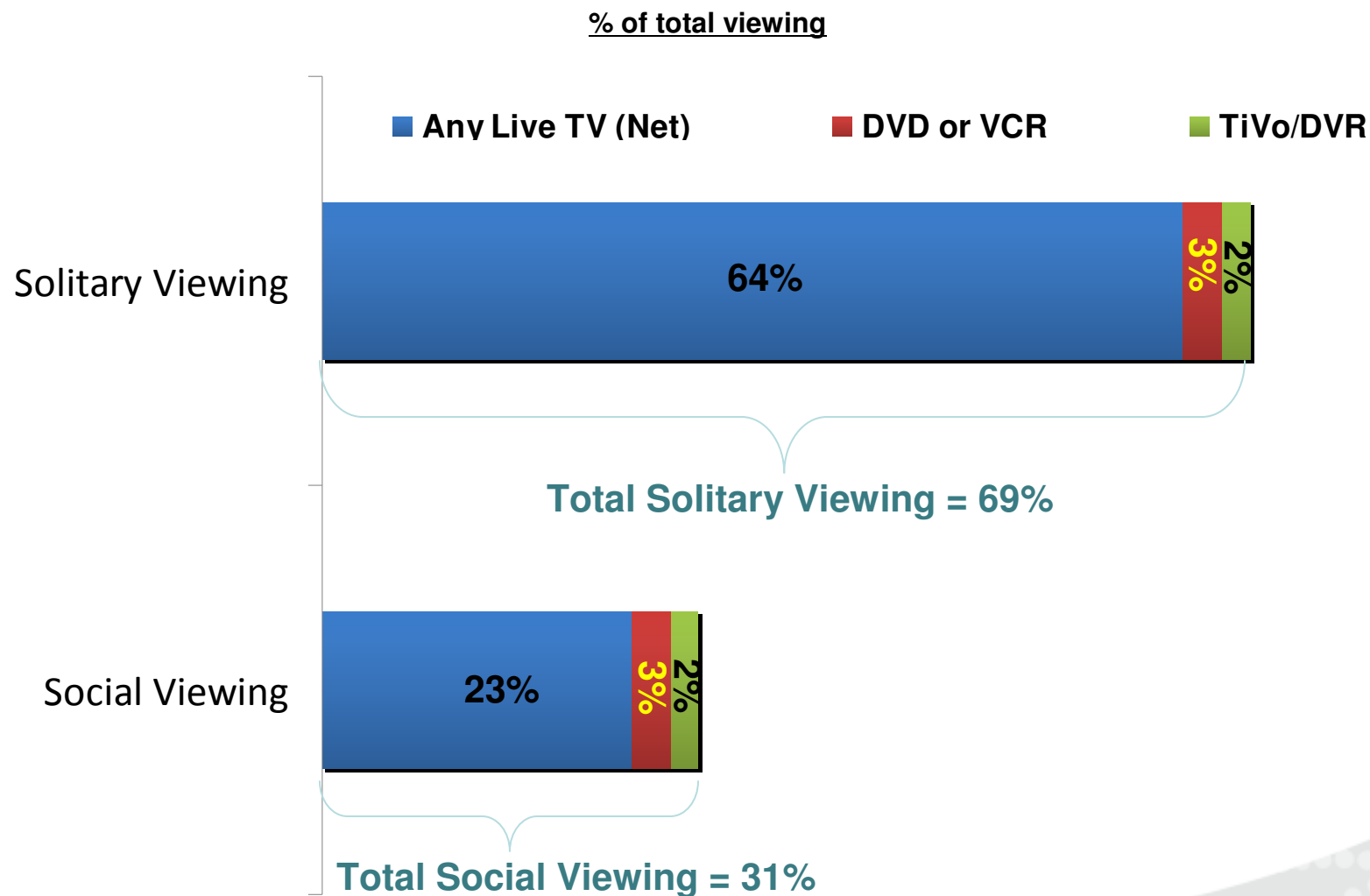
Following onset ...



Solitary vs. Social Viewing



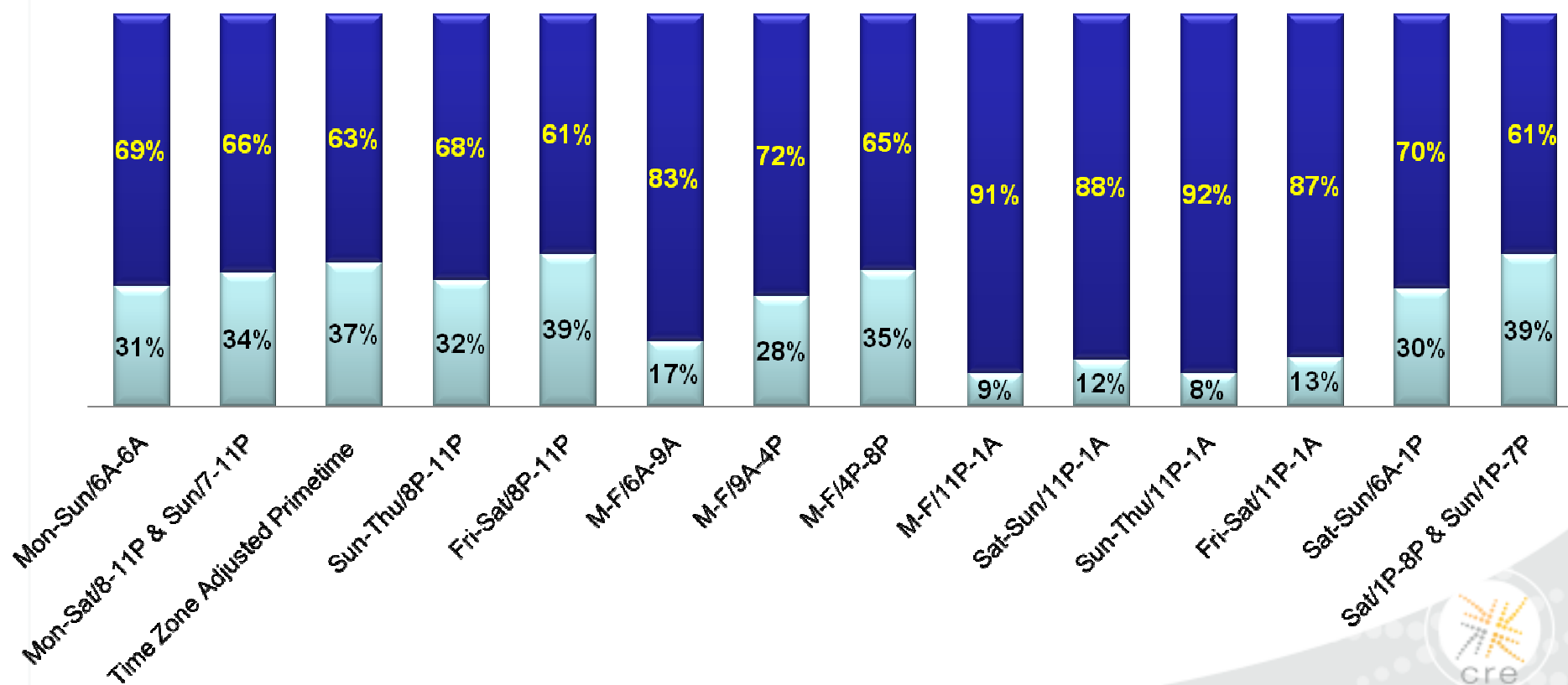
Over two-thirds of all TV viewing occurs without the presence of anyone else watching in the room at the same time.



The highest concentrations of social viewing occur during primetime and weekends.

Solitary vs. Social: share of minutes viewed by daypart

■ Social ■ Solitary

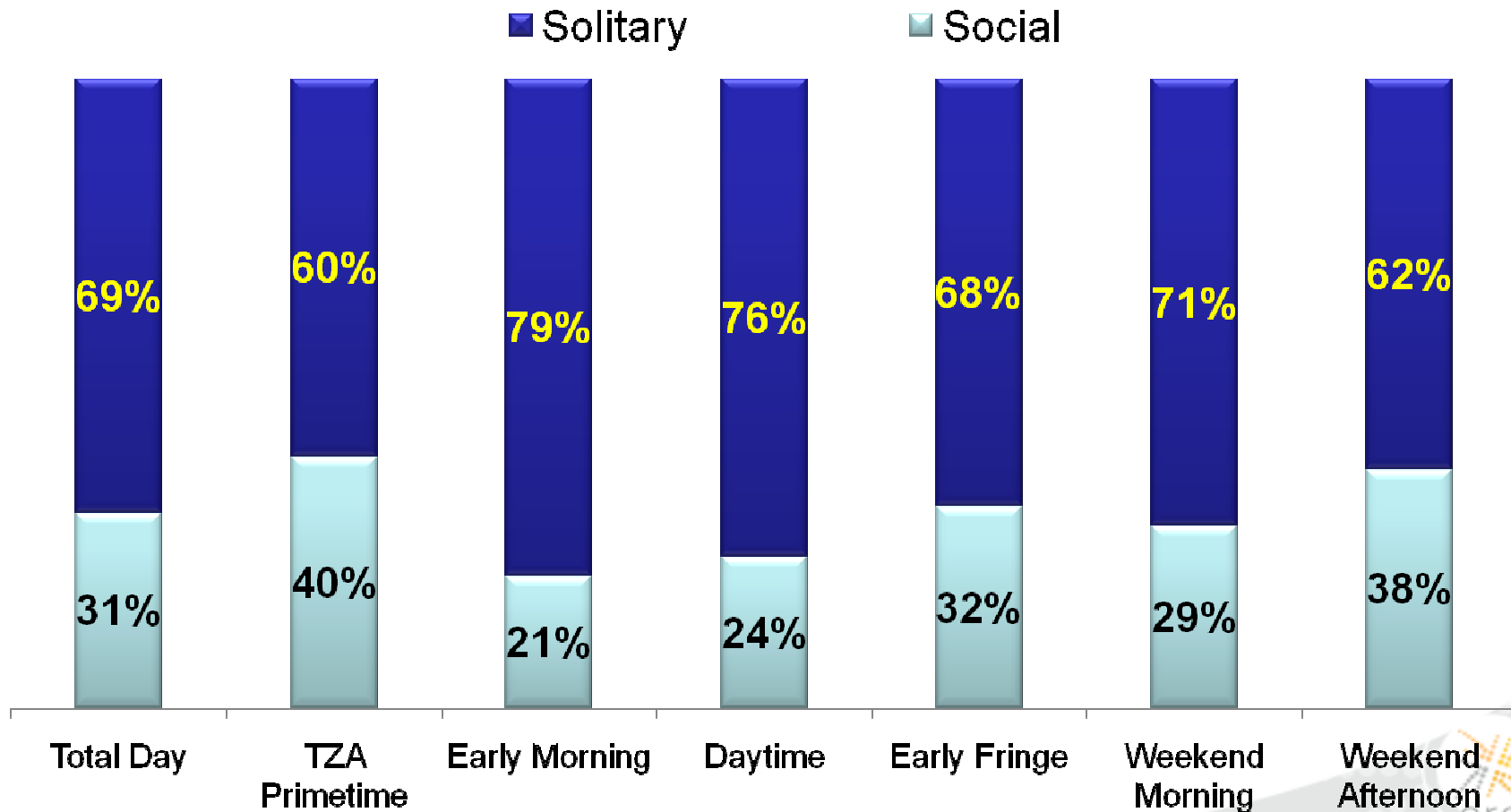


Note: Early morning and Late Night based on recall methodology; Total Adults TV viewing minutes



Primetime and weekends also have the highest % of social viewing minutes during commercials/promos.

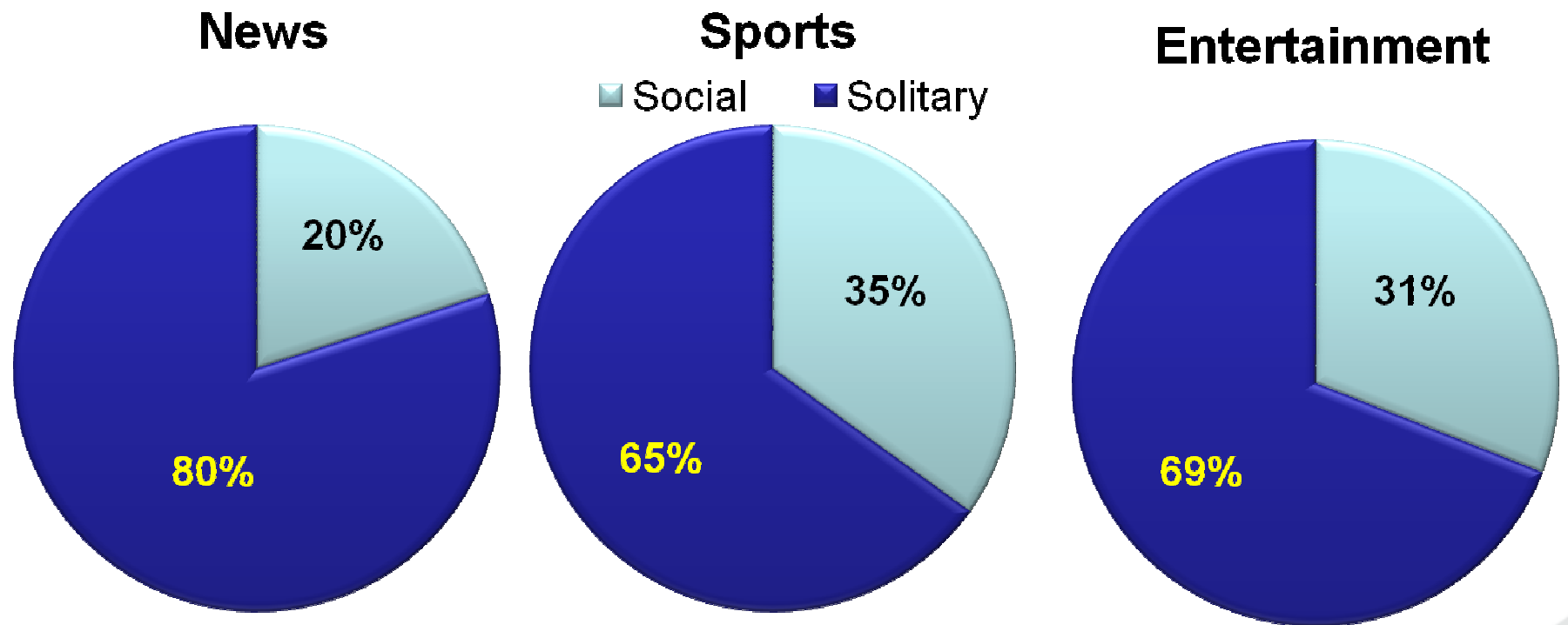
Solitary vs Social: share of minutes viewed by daypart:
Commercial viewing only



Note: Early morning and Late Night based on recall methodology; just Total Adults commercial viewing

**As a whole, the Sports genre has the highest % of social viewing,
but 65% of sports viewing is solitary.**

Solitary vs Social: share of minutes viewed by genre

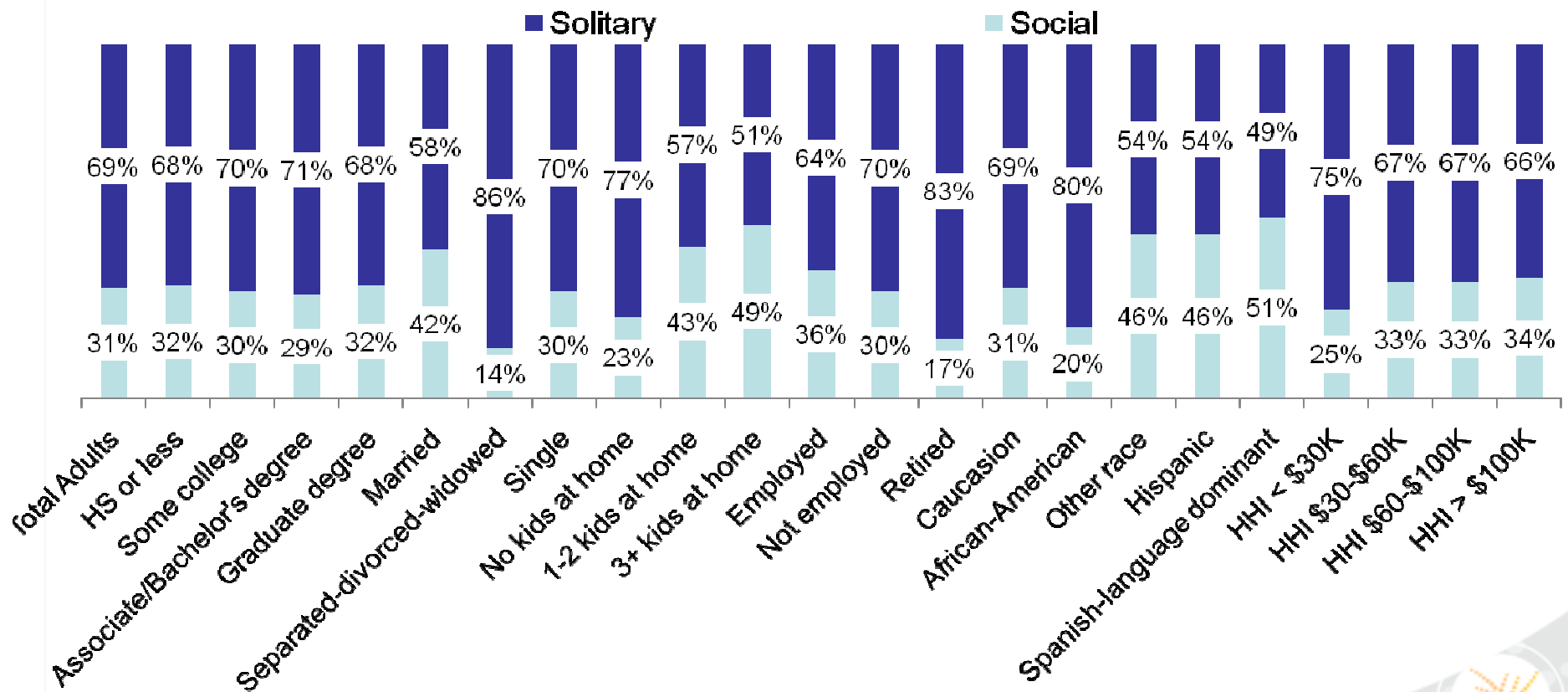


Note: Total Adults TV viewing minutes



Solitary viewing is highest among those Separated/Divorced/Widowed, Retirees, No children, African Americans and HHI <\$30M.
Social viewing is highest among Hispanics, 3+ Kids.

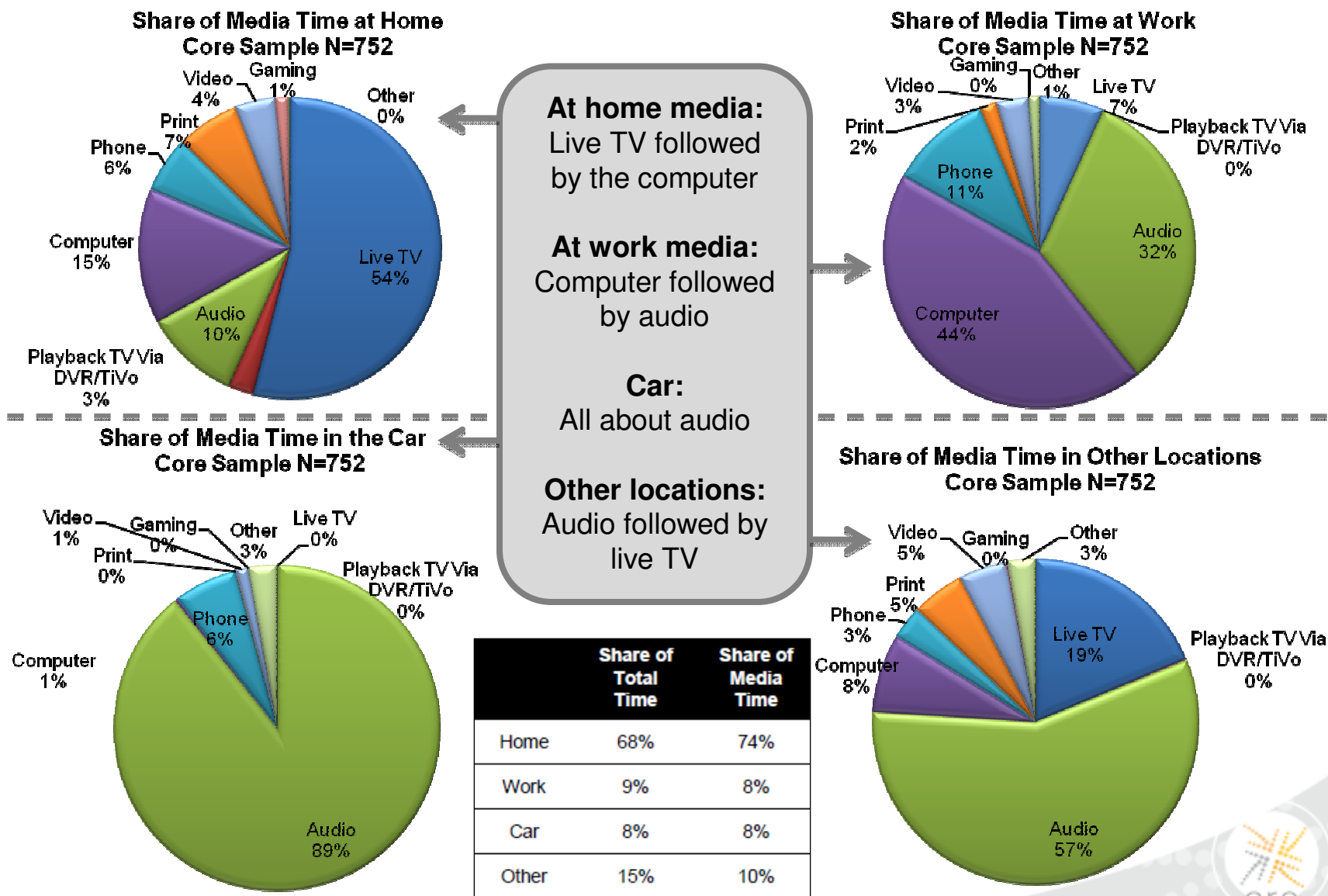
Share Of Minutes Viewed by Demography



Out of Home Viewing

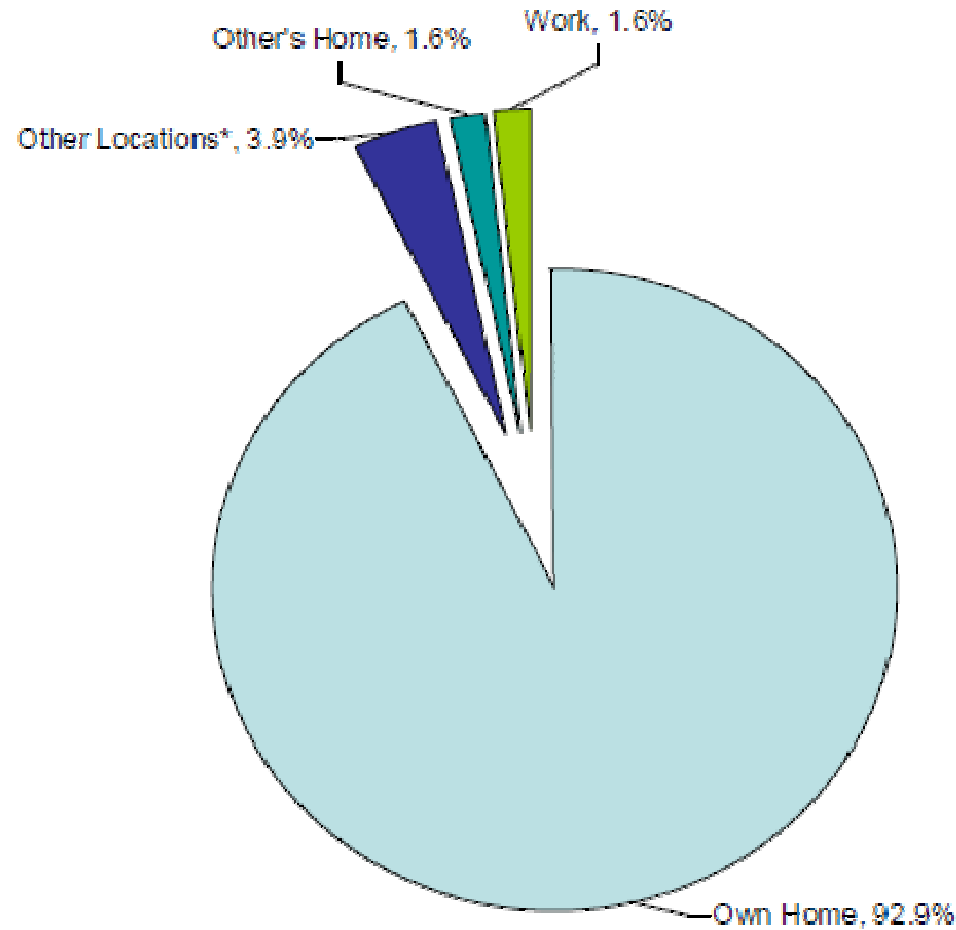


Share of media usage varies by location



**Although the majority of TV usage happens at home,
7% of viewing occurs outside the home.**

Percentage of minutes of live television viewing/exposure by location

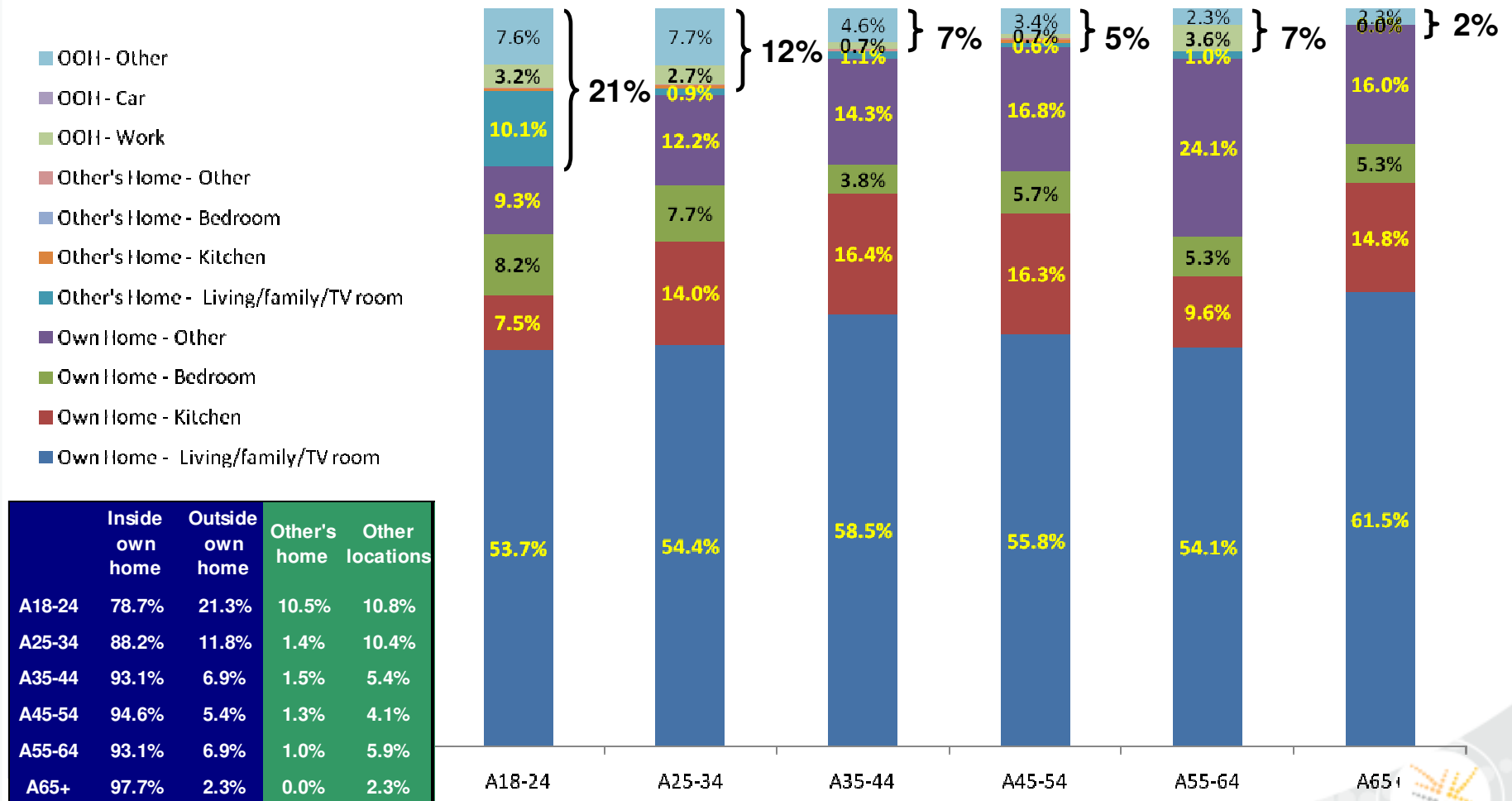


*Other locations include restaurants, bars, schools, stores, outside or any other public place



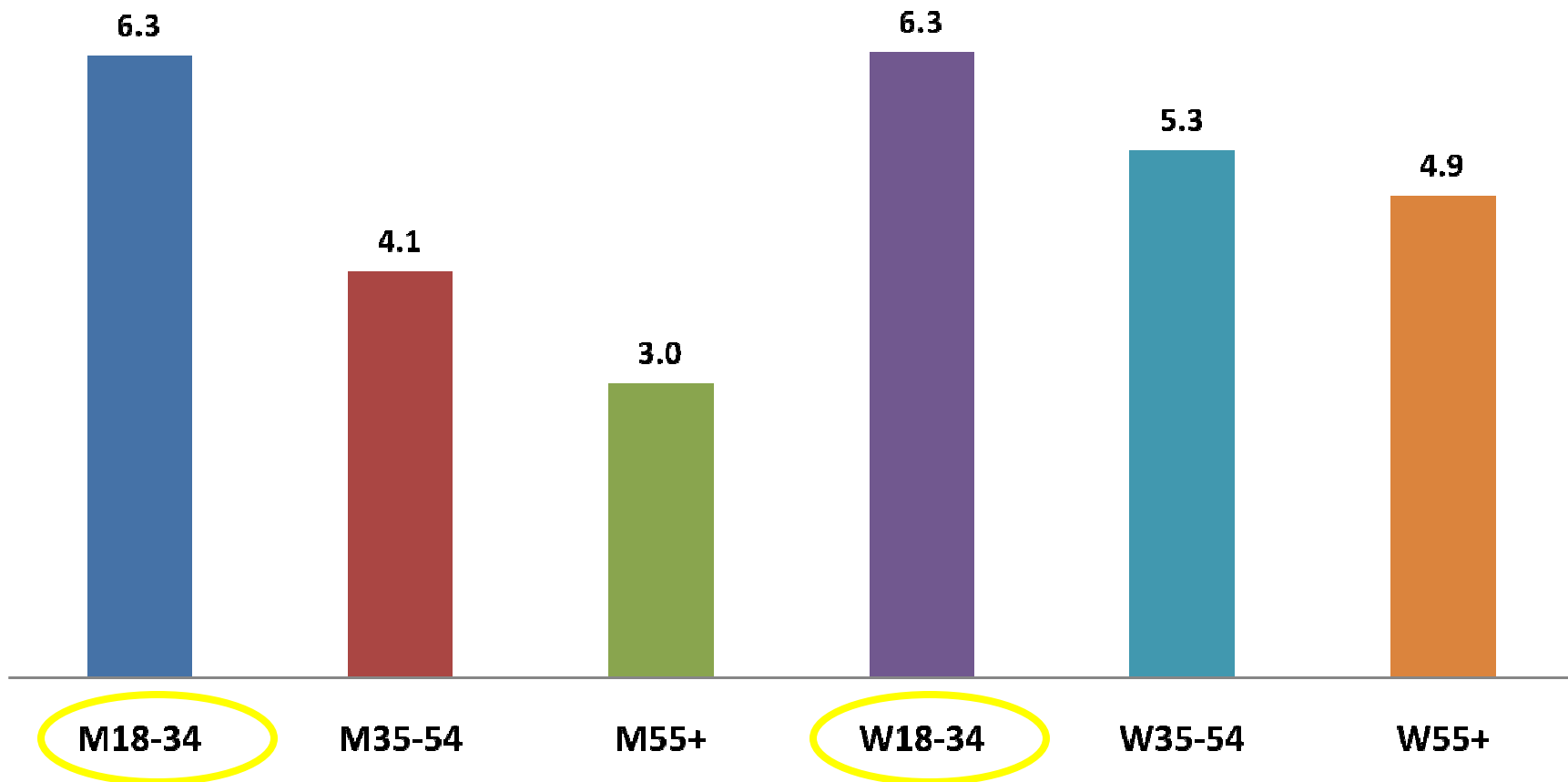
Younger viewers are most likely to watch TV away from their home ... comprising 21% of their total TV day.

Share of Total TV Viewing By Location by Age



Working young adults spend the most time with media.

Daily hours of media time at the workplace by Gender/Age*



* Reflects time spent with the computer, Live TV, audio, print, video, telephone and other media



Media in Context: Location and Life Activities

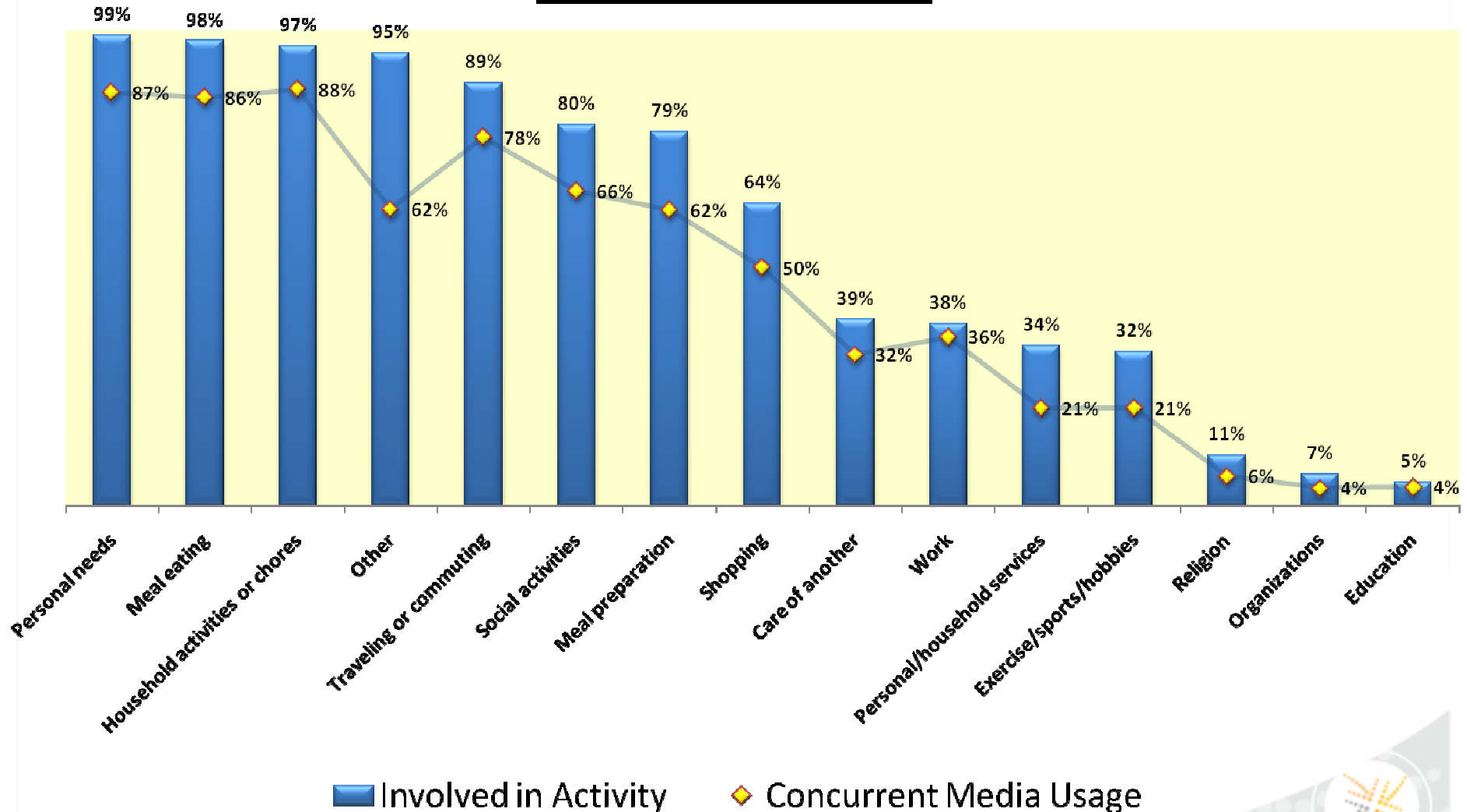


**The observational methodology utilized for the
“*Video Consumer Mapping Study*” provided
the ability to confirm that we truly are a
“multi-tasking” society
when it comes to media consumption
in the context of peoples’ daily lives.**



Media usage, in varying degrees, is a constant companion during daily life activities.

Media usage during life activities

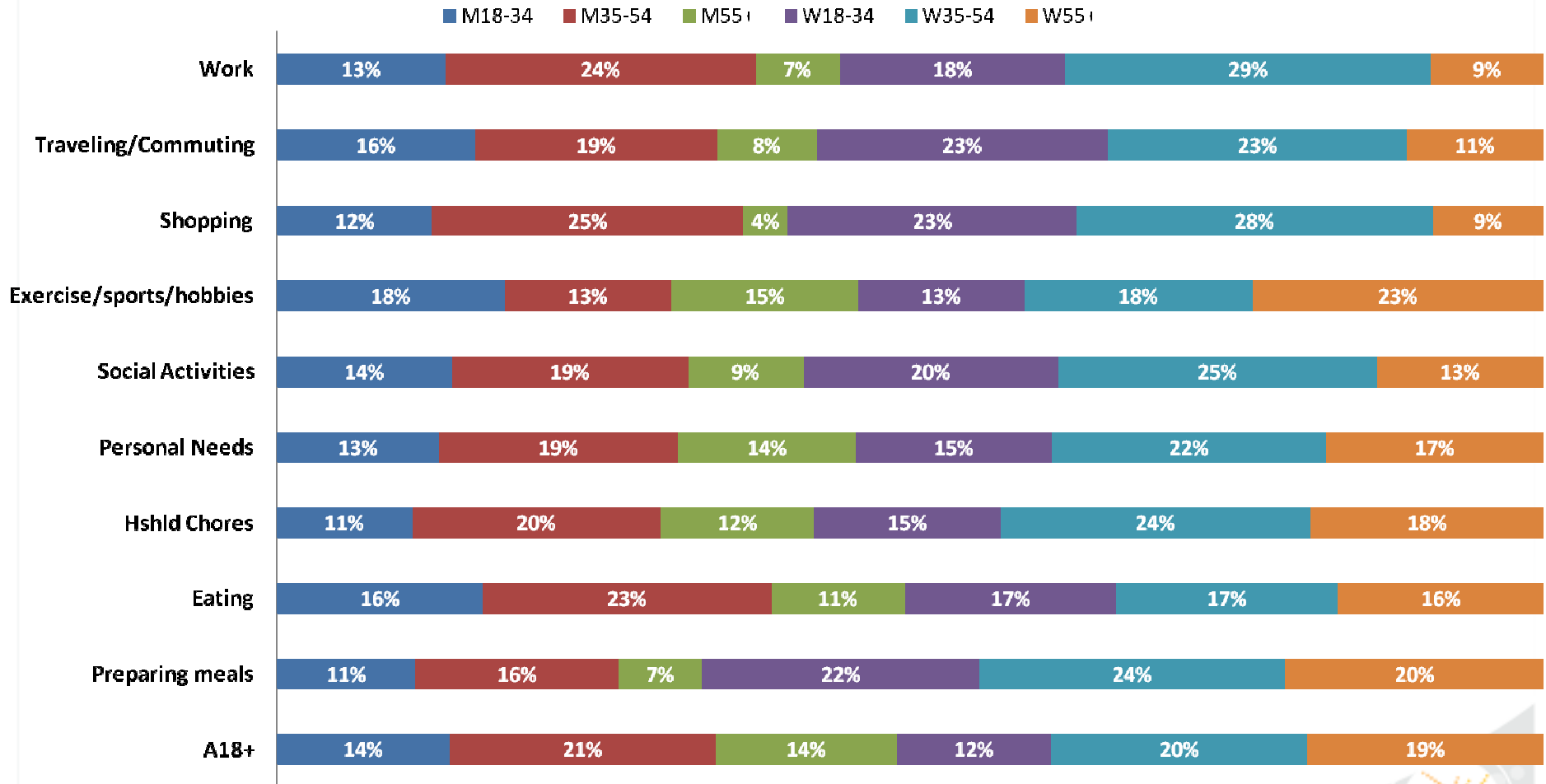


To be read: 79% of all Adults engage in meal preparation daily. 62% of all adults consume media while involved in meal preparation.

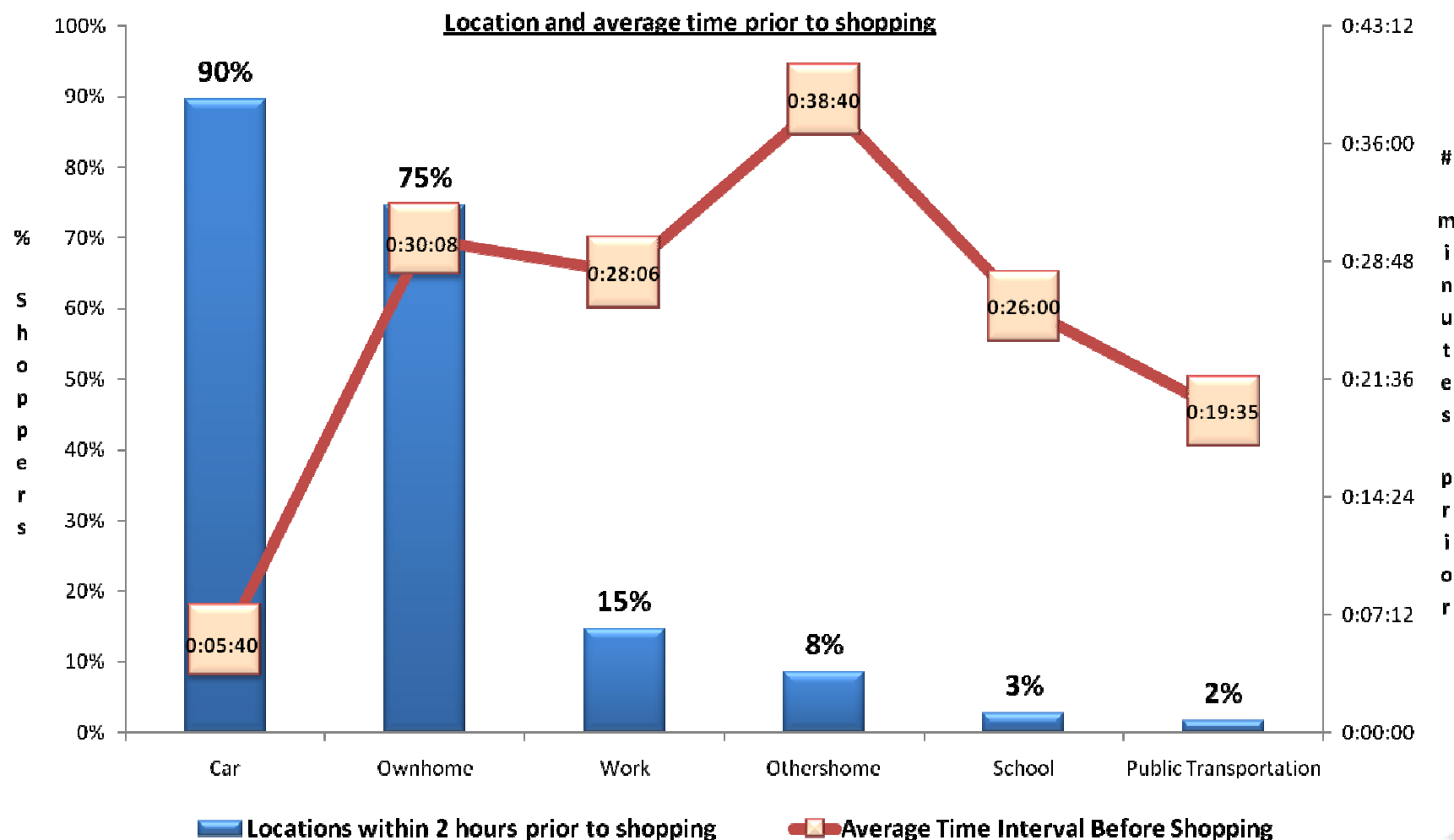


Primetime is still a very busy time for W18-34 and W35-54.

% Composition by Gender/Age : TZA Primetime



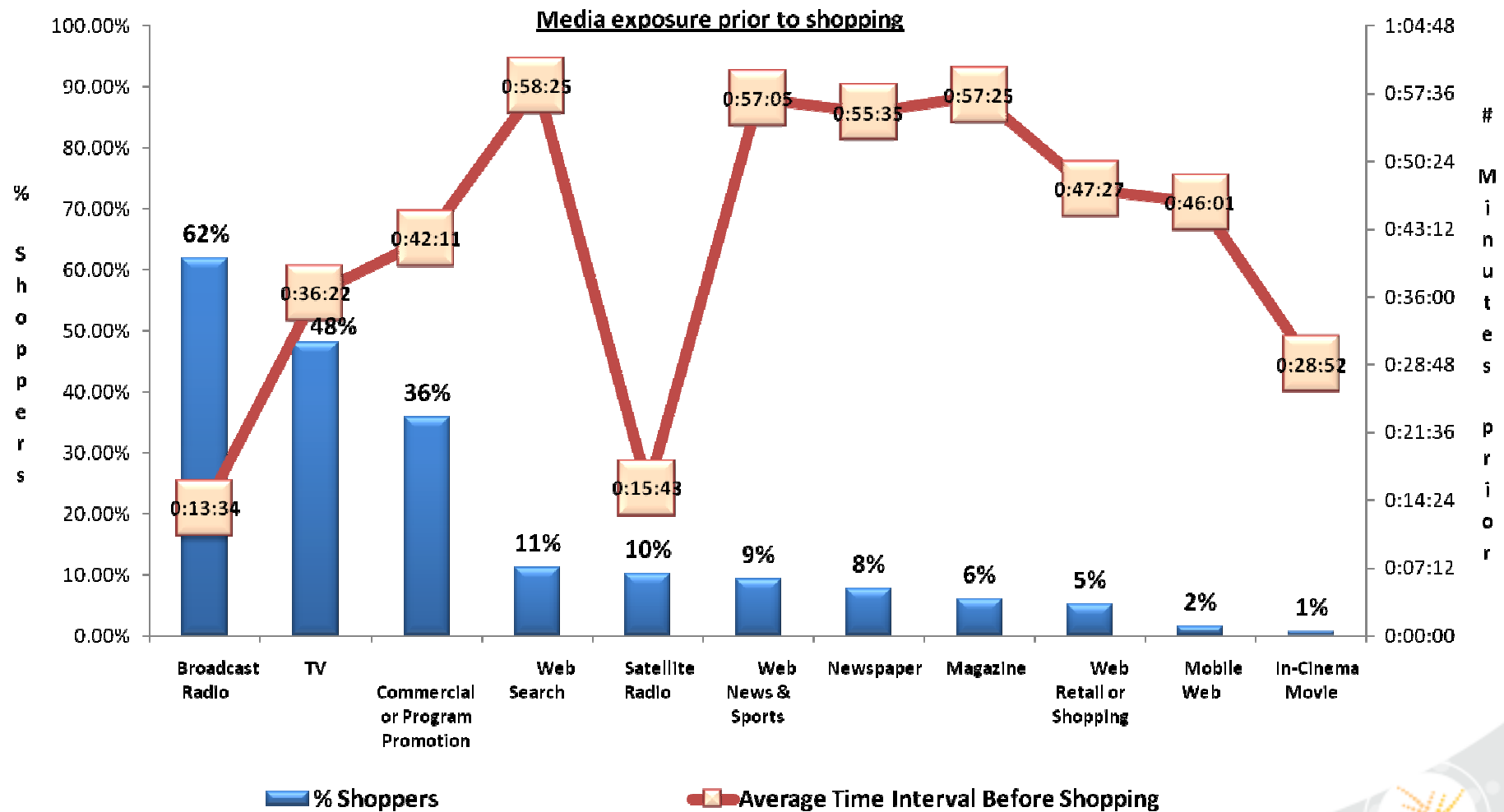
On average, 90% of shoppers are in cars 5 minutes before shopping and 75% are in their own homes 30 minutes prior.



Note: Additional shopping within 30 minutes of the initial target event were considered part of the same shopping event

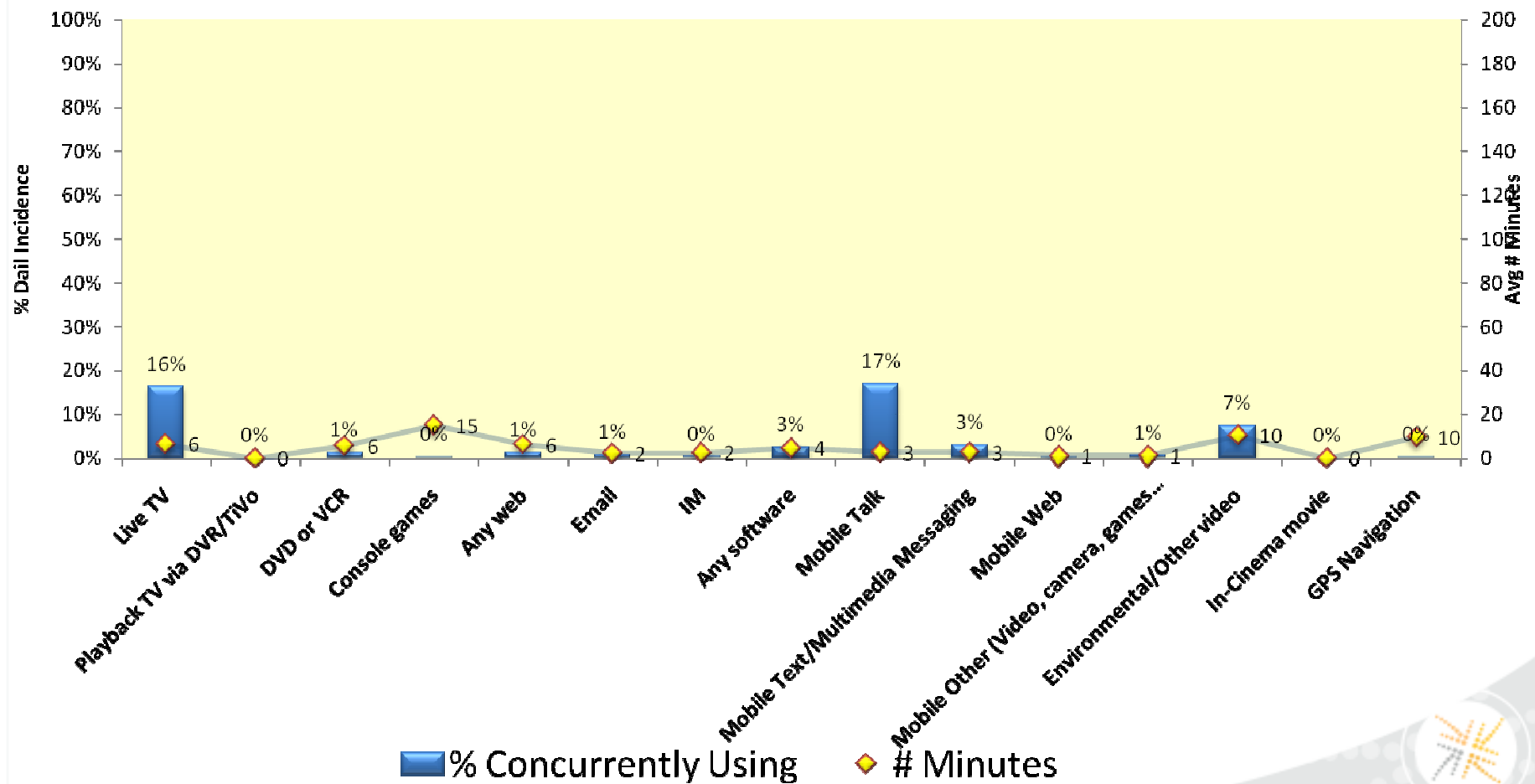


**62% of shoppers listened to the radio 13 minutes prior to shopping;
36% saw a TV commercial 42 minutes before shopping.**



While shopping concurrent screen media usage is virtually non-existent.

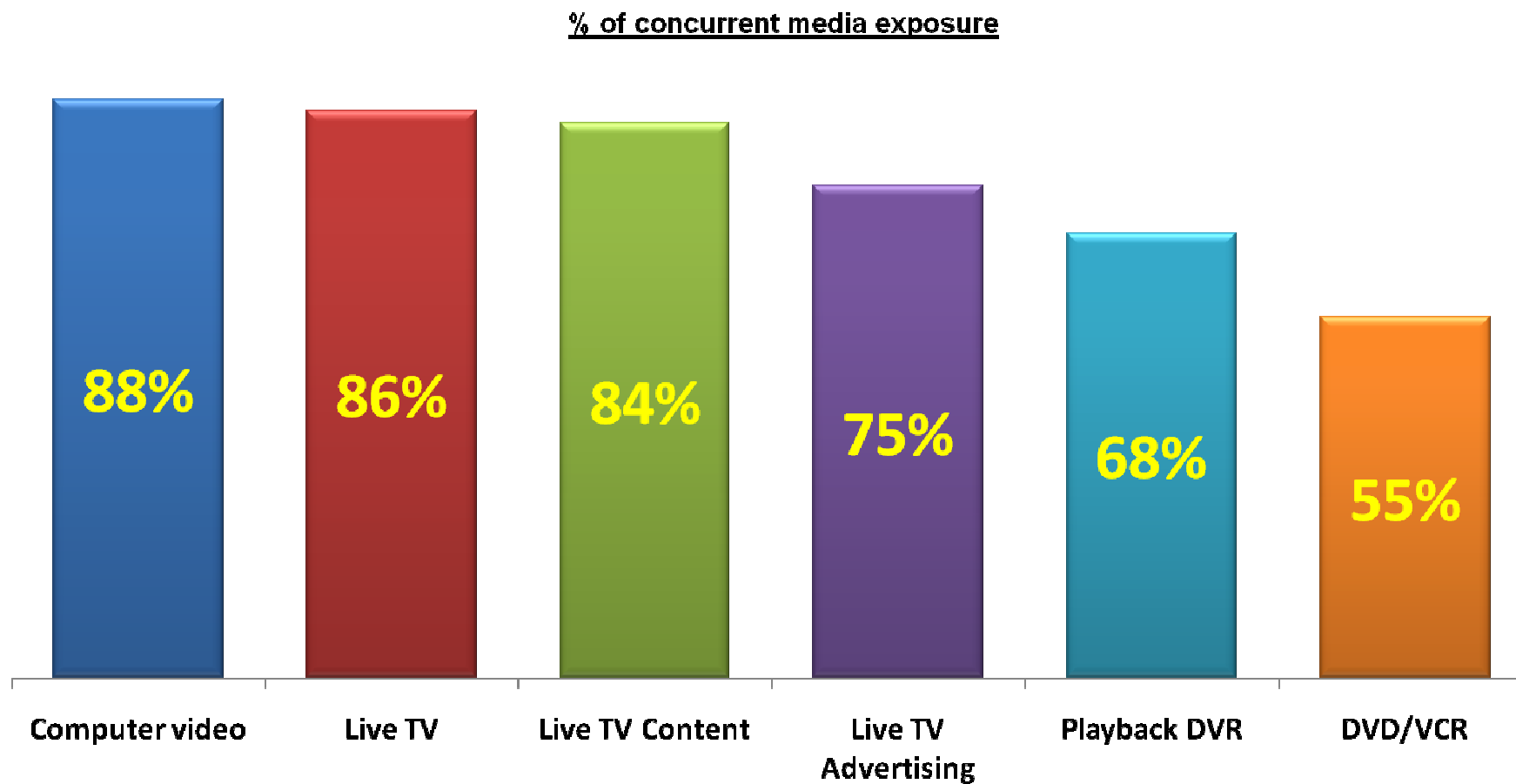
Base: Adults Shopping (64%)



Concurrent Media Usage



There is a very high degree of more than one media activity occurring at the same time.

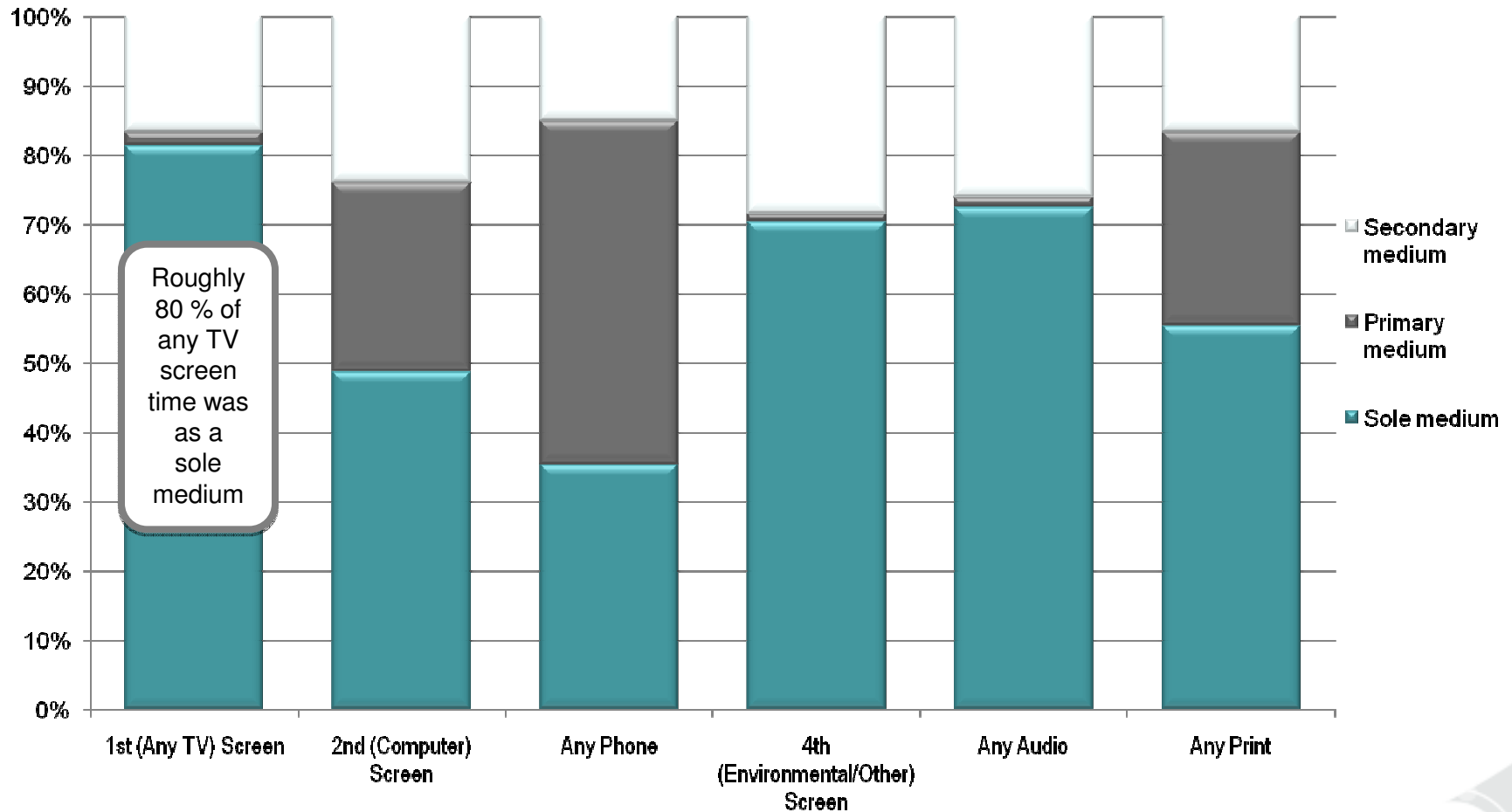


Read: 86% of Live TV viewers had some degree of current exposure to other media









1st (Any TV) screen exposure tended to exclude other media

Share of Concurrent Media Exposure For Screen and Other Major Media



The following chart shows which specific media were disproportionately used concurrently

6 Degrees of Concurrency

		Sole or Concurrent Media Exposure		
		Sole medium	Primary medium	Secondary medium
Media With or Without Concurrent Life Activity	Media only	1  TV	3  Phone primary	5  Laptop secondary
	Media with another life activity	2  Newspaper while traveling	4  Phone primary while eating	6  Laptop secondary while eating

6

Secondary medium,
With other life activity

5

Secondary medium,
Media only

4

Primary medium,
With other life activity

3

Primary medium,
Media only

2

Sole medium,
With other life activity

1

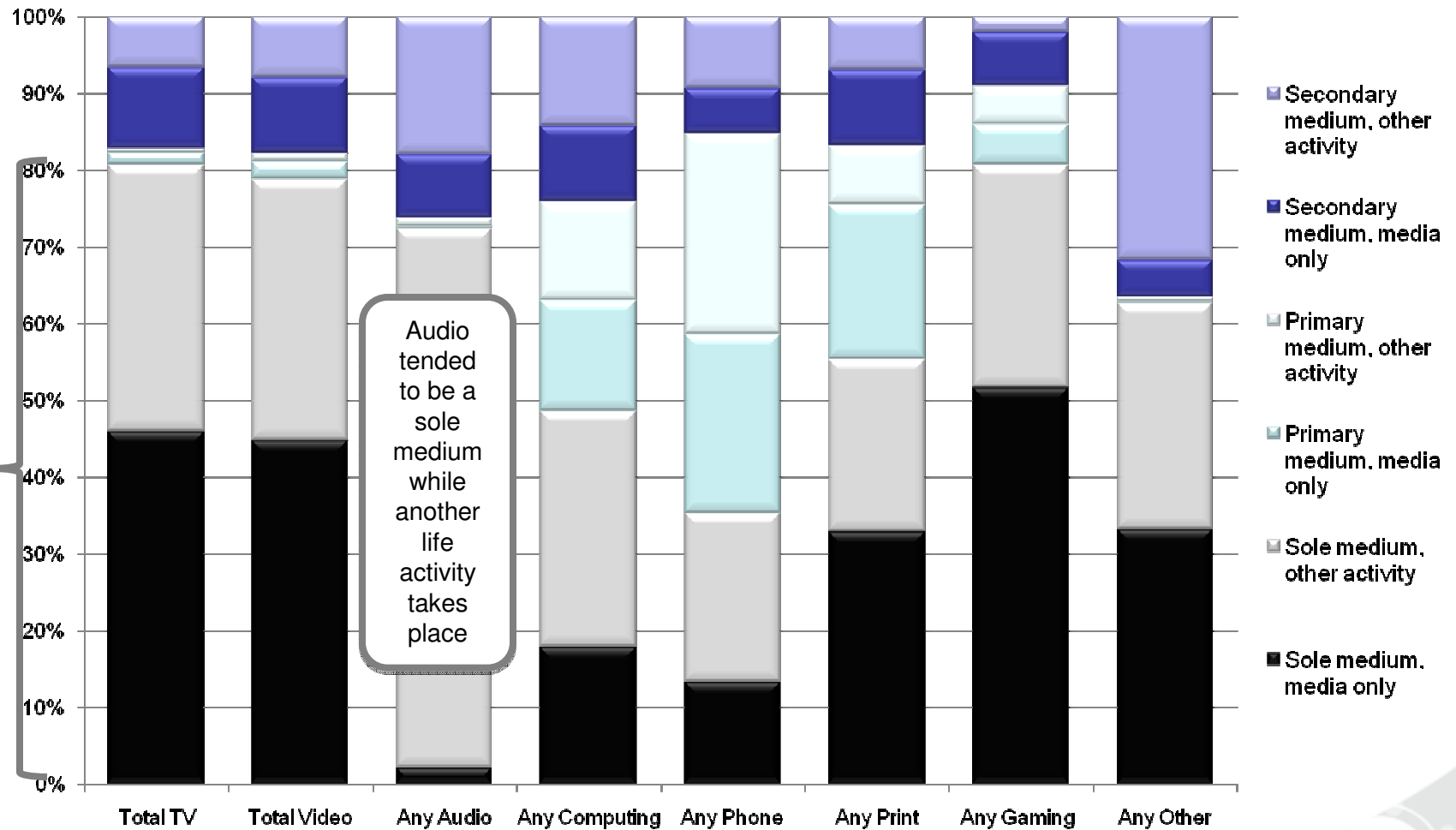
Sole medium,
Media only

Building from the bottom,
starting with the strongest degree



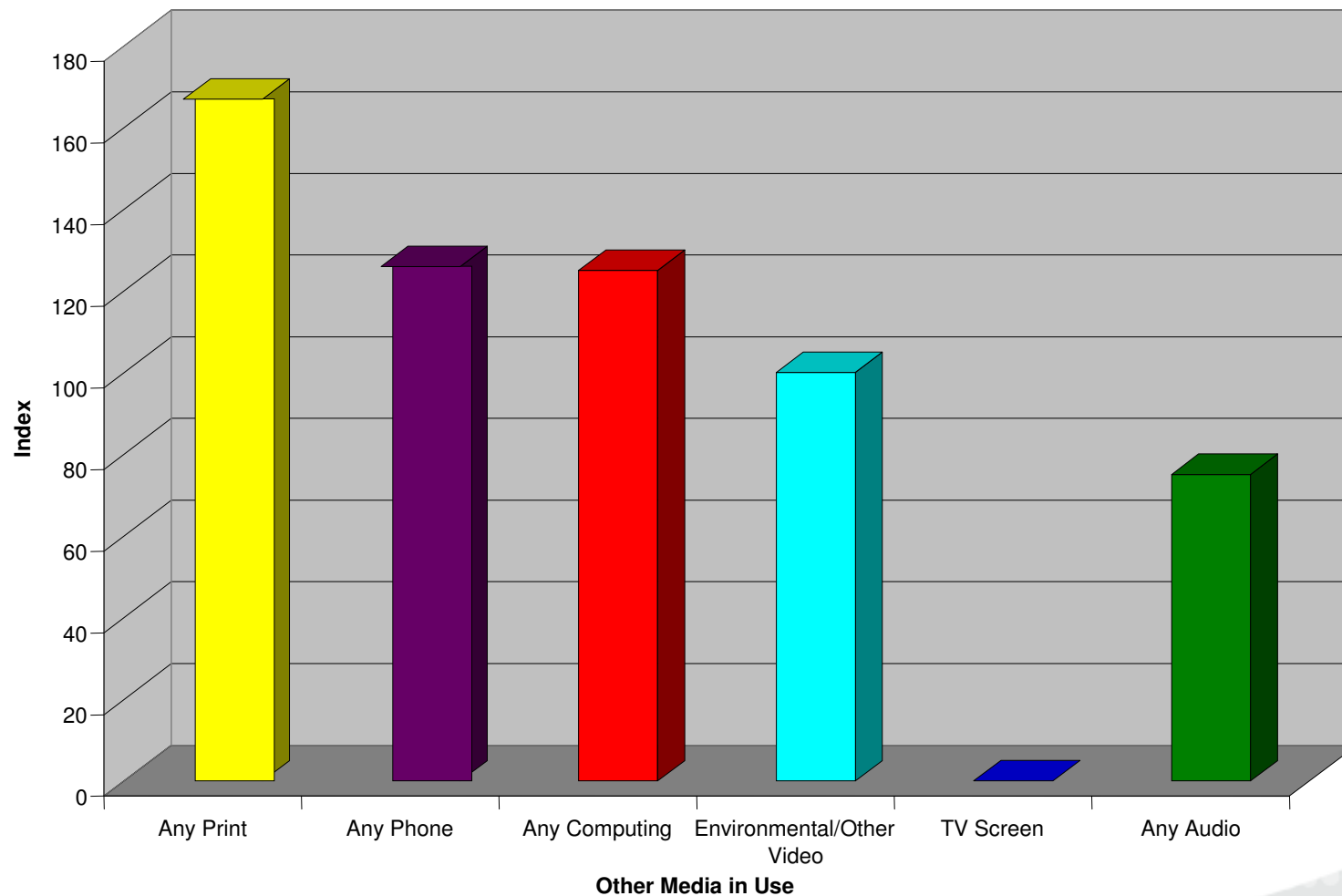
Major Media Varied Substantially By The 6 Degrees Of Concurrency

Share of Total Minutes, Core Sample, N=752, Spring '08 & Fall '08



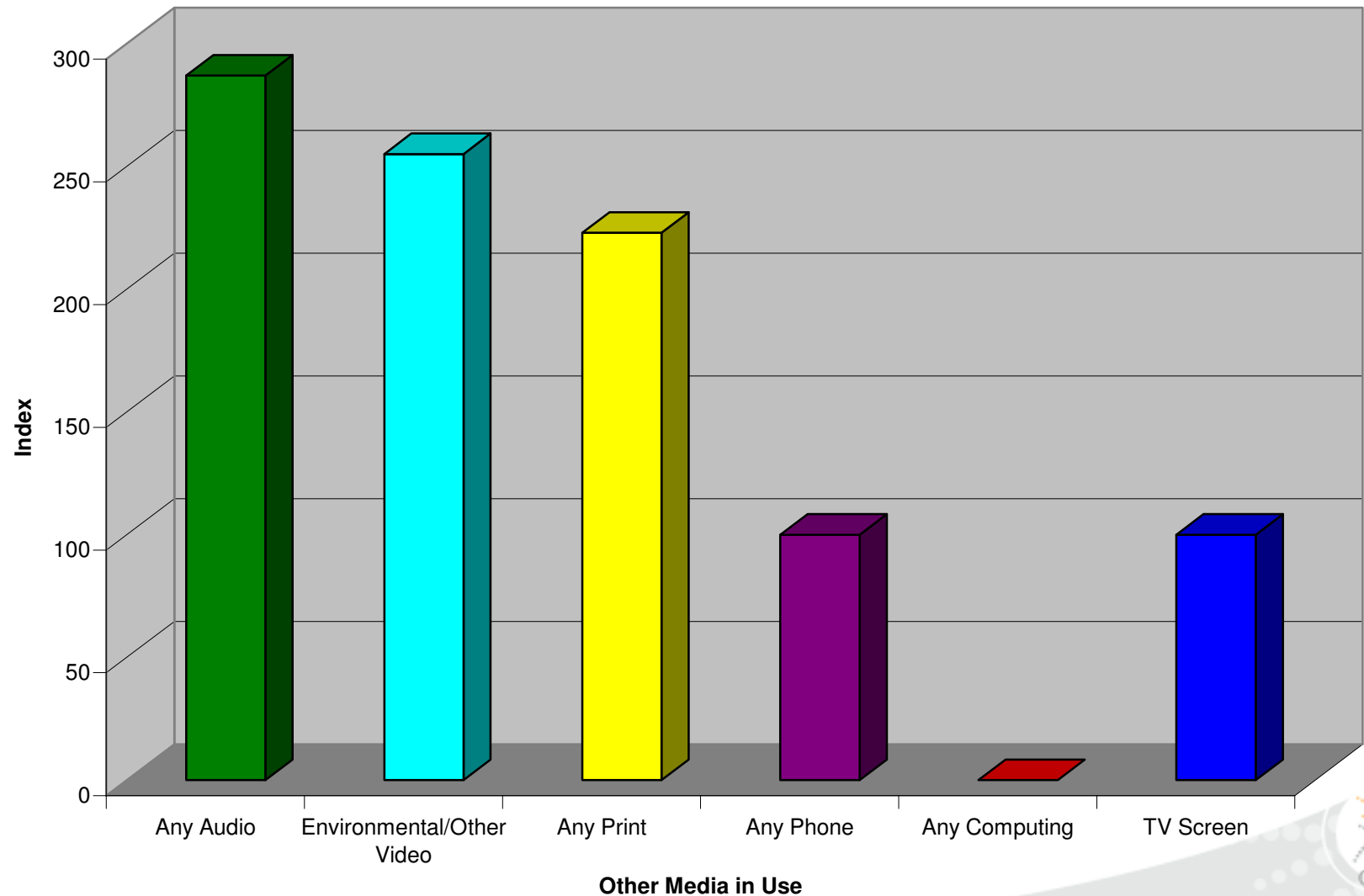
The media most often used while watching TV is print, followed by telephones and computers.

Concurrent usage when the TV Screen is the primary media

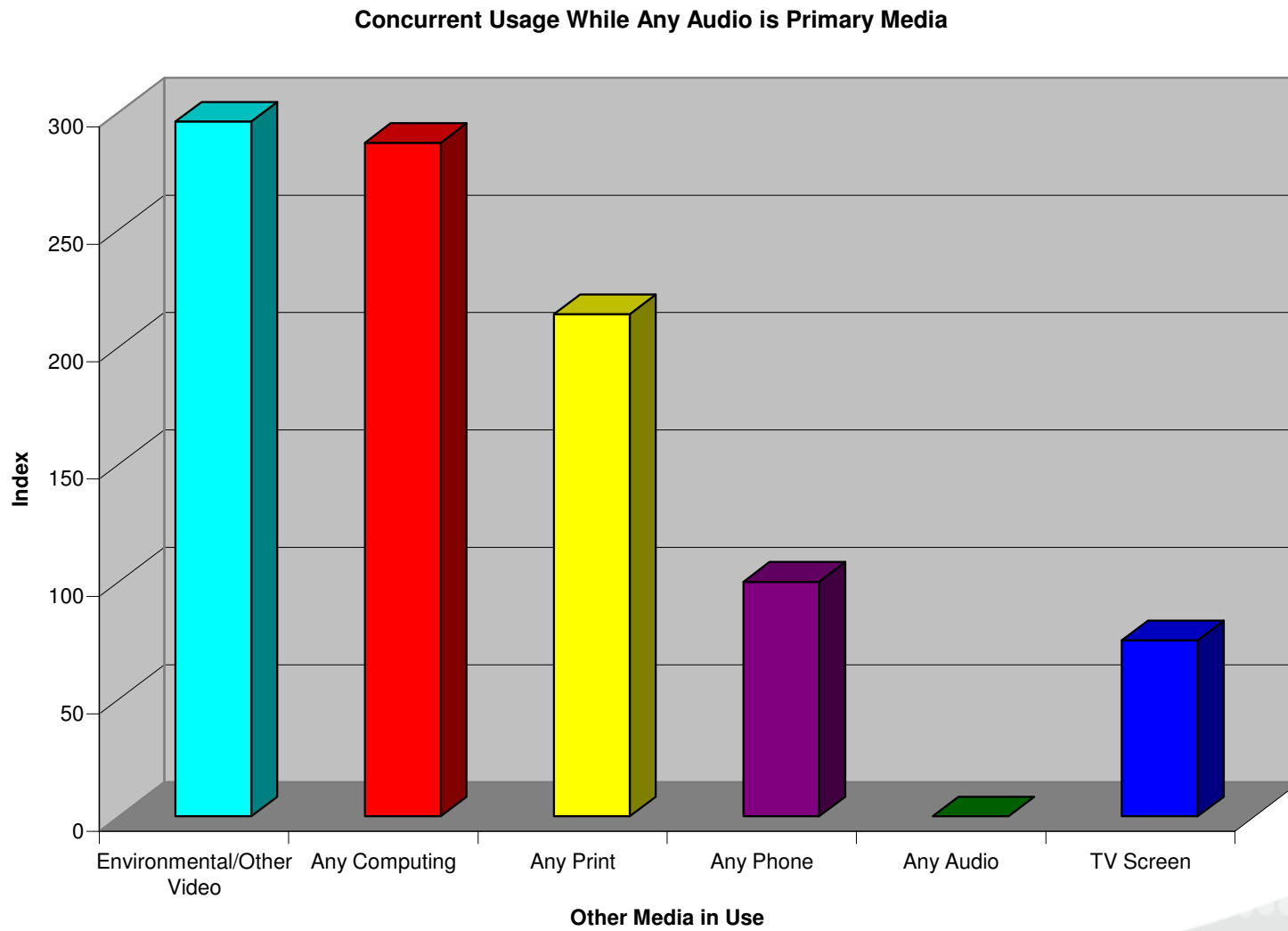


**The media most often used while using a computer is audio,
followed by environmental video, and print media.**

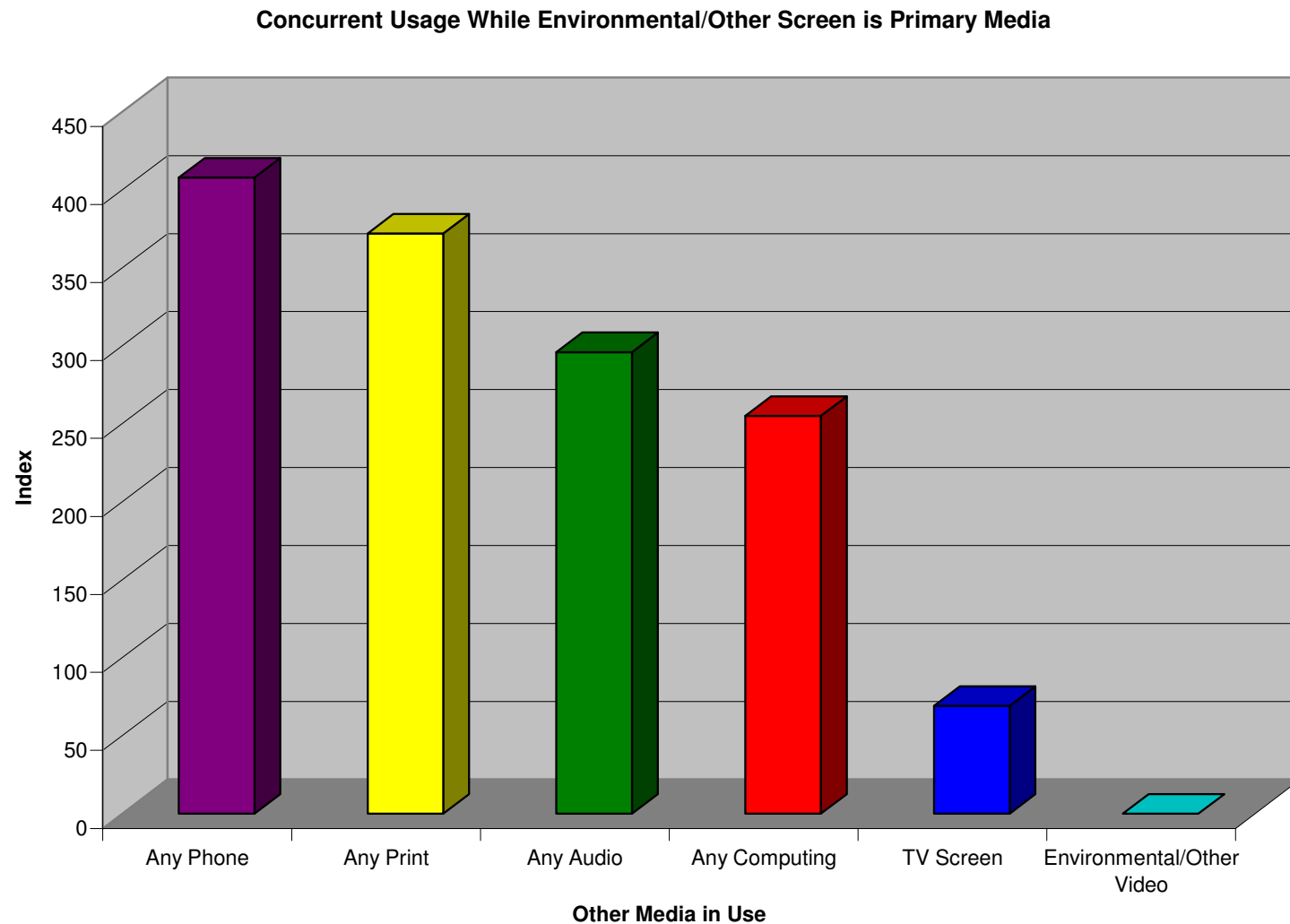
Concurrent Usage While Computer Screen is Primary Media



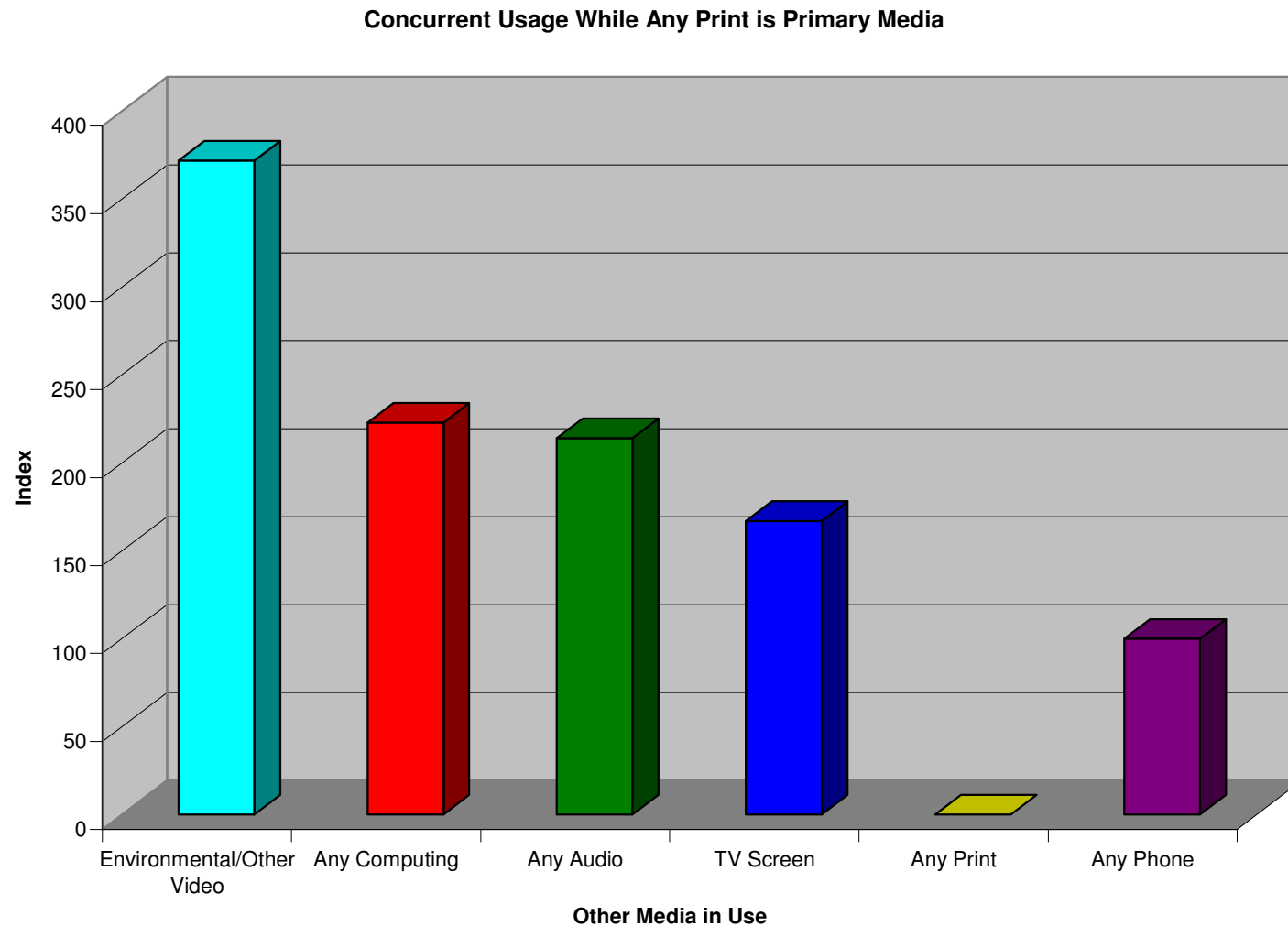
The media most often used while listening to the radio is environmental video, computers, and print media.



The media most often used while exposed to environmental video are phones, print media, audio, and computers.



The media most often used while using print media is environmental video, computers, audio, and TV.





Additional Detail Can Be Found At:

www.researchexcellence.com