



LONGITUDINAL ETHNOGRAPHY & ACCELERATION STUDY

August 6, 2014

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WiFi information:
SSID: TimeInc_Guest
Passcode: piaffe

AGENDA

12:00 Lunch

12:30 Introductions: Richard Zackon, Ceril Shagrin, Bryon Schafer

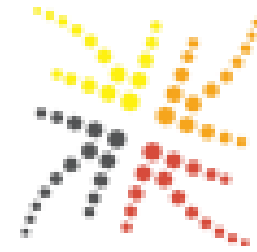
12:45 Research Report: Heather Coffin, GfK

1:30 Council POV: Cheryl Brink, Laura Cowan

1:40 Audience Questions

2:00 Panel Discussion Brad Adgate, Bryon Schafer, Eric Solomon,
Dave Tice

2:30 Adjourn



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ABOUT THE CRE

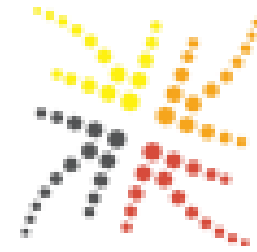
The Council for Research Excellence is a body of senior research professionals, formed in 2005 to identify important questions about audience measurement methodology and to find, through quality research, the answers to those questions.

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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Chair

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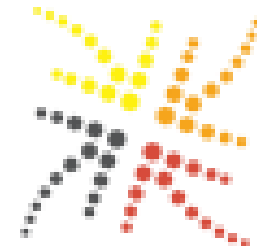
Beth Rockwood

Laura Cowan

Ceril Shagrin

Sherrill Mane

Antonia Toupet



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ACCELERATION COMMITTEE

Laura Cowan

Chair

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Tim Brooks

Susie Thomas

Janet Gallent

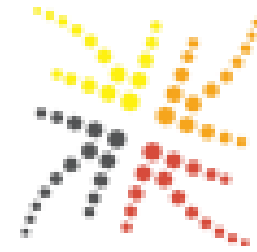
Antonia Toupet

Bryon Schafer

Emily Vanides

Ceril Shagrin

Jack Wakshlag



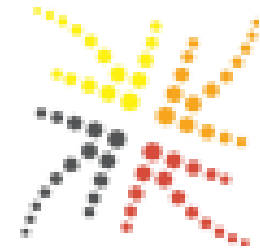
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CERIL SHAGRIN

CRE Chair

EVP Corporate Research
Univision



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BRYON SCHAFER

CRE Digital Committee Chair

SVP

Media Research & Insights
Warner Bros. Television Group



OBJECTIVES & RESEARCH QUESTIONS



KEY RESEARCH QUESTIONS



What new viewing patterns are arising?



KEY RESEARCH QUESTIONS



How does video viewing differ by device in the home, and outside of the home as well?



KEY RESEARCH QUESTIONS



What motivates the selection and purchase of new viewing technologies and services?



RESEARCH OBJECTIVES

- 1** *Understand the changing media landscape resulting from internet technology and video platform proliferation*
- 2** *Inform the development of strategies for audience measurement*



TWO STUDIES

ACCELERATION

50 households in the Chicago area tracked over a 15 week period

Project duration: Nov. 2013 to April 2014

Initial visits of 50 households

In-store or online purchase event

Continual tracking of all households via a Participant Toolkit (PTK) and behavior and usage surveys

Follow up questions based upon incoming data

LONGITUDINAL ETHNOGRAPHY

National sample of **100** households tracked over two years

Project duration: Nov. 2013 to Oct. 2015

Initial visits of 100 households

Continual tracking of all households via a Participant Toolkit (PTK)

Targeted, in-person time with 25 households

Visit 25-50 new households in 2015

WHY ETHNOGRAPHY

 **Rooted in Anthropology**

 **Based on observations from the perspective of the consumer**

 **Has played a role historically in the development of audience measurement systems.**

- Helps with various issues, such as:
 - Practical issues (e.g. measuring kids)
 - Philosophical issues (e.g. what constitutes an exposure)

A NOTE ABOUT THE METHODOLOGY



Ethnographic research is qualitative research



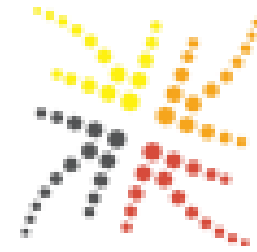
By design, it is:

- Not meant to be representative
- Not meant to be projectable



It is framed to oversample users of specific groups, such as:

- SVOD Subscribers
- Latinos

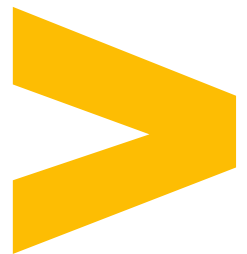


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HEATHER COFFIN

Senior UX Lead
User Experience
GfK



APPROACH

In-Person & Digital Ethnography

CO-DISCOVERY & ENGAGEMENT

*Build Trust and
Maintain Engagement*

Ethnography

Track Over Time

*Synthesize and
Visualize Data*



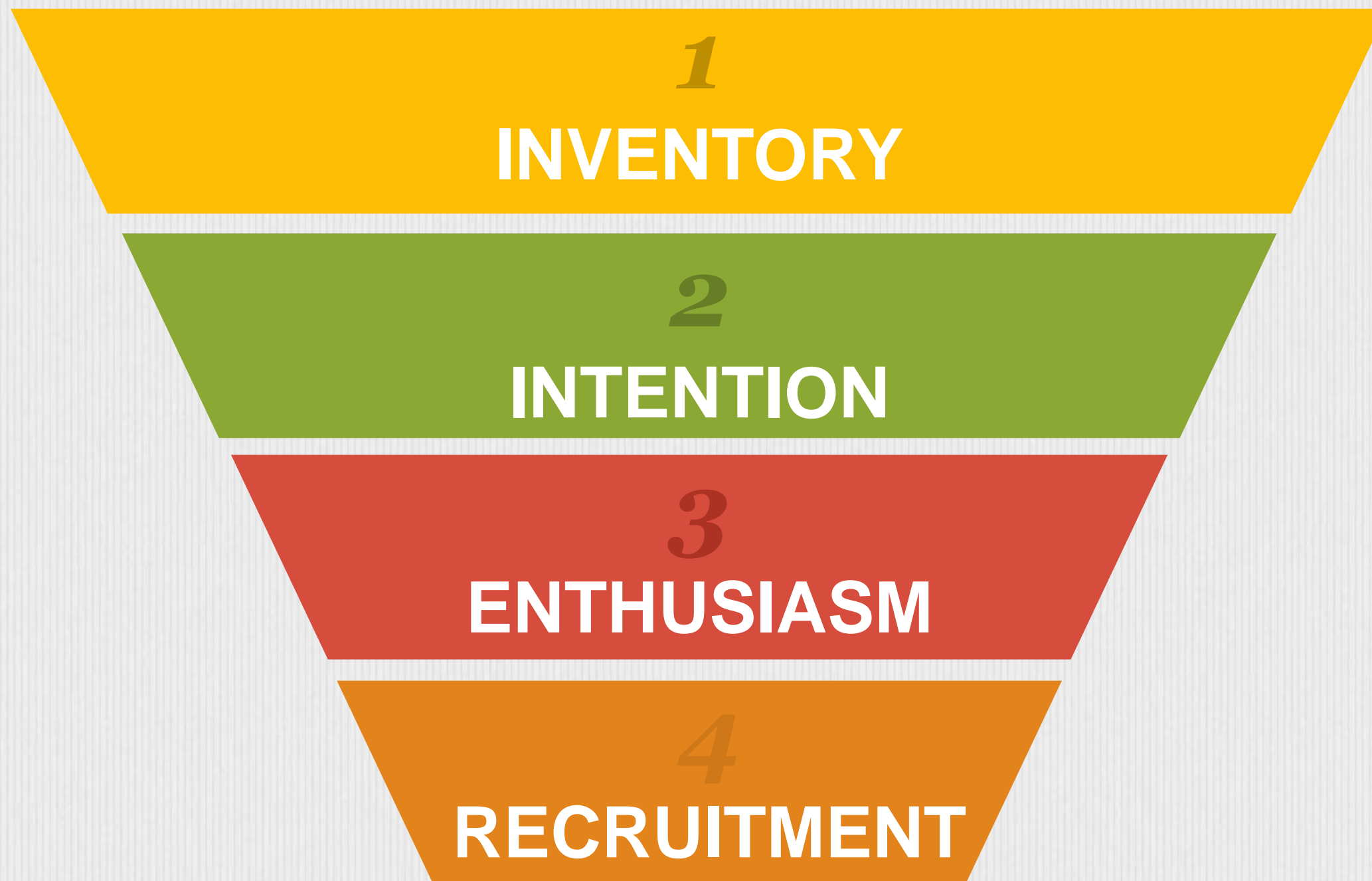


ACCELERATION STUDY

Sample and Method

RECRUITMENT FUNNEL

Recruitment was designed to identify households intending to make a media technology upgrade before remuneration was discussed.



STUDY SAMPLE



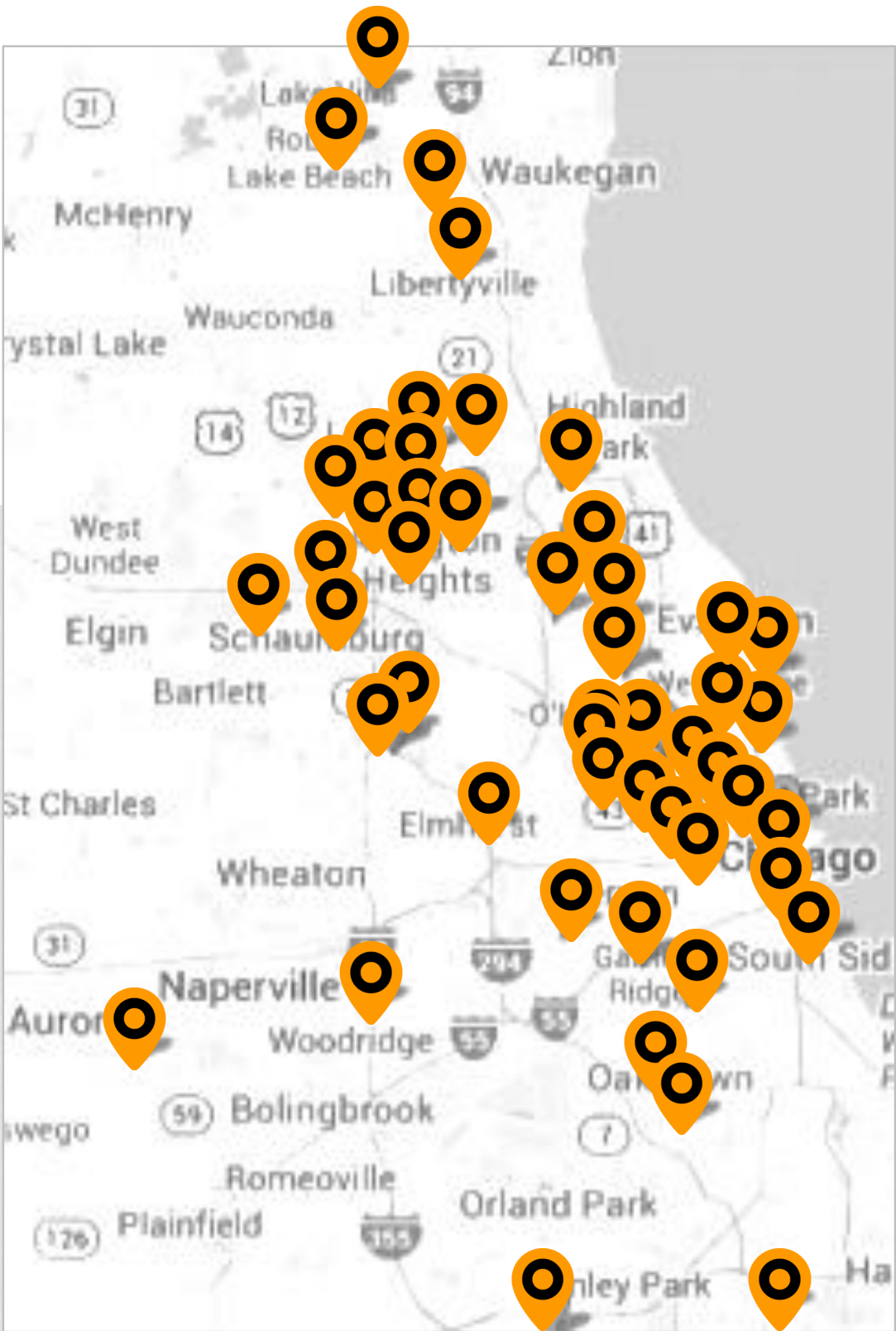
50 *households*

Households were located in the Chicago-land area, covering both urban and suburban locales.

HOUSEHOLD TYPES



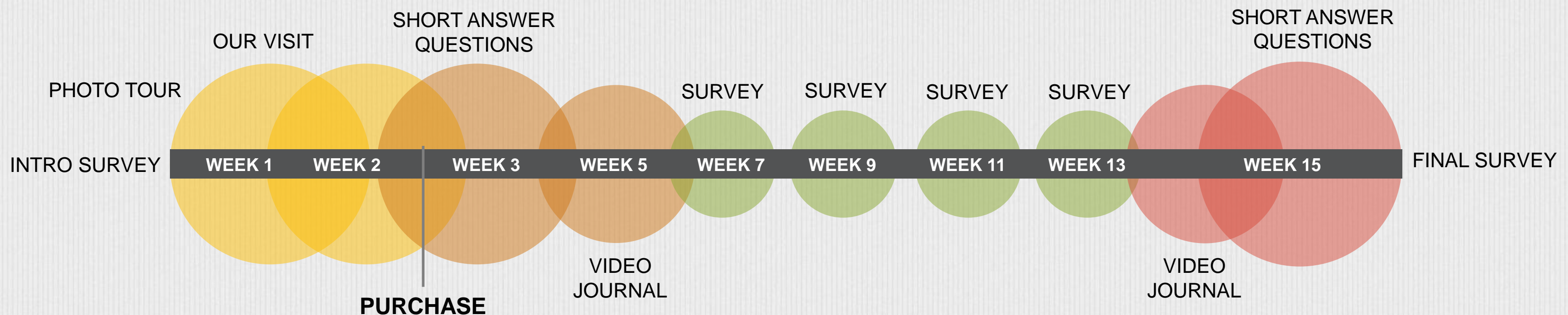
DEMOGRAPHICS



BLENDED METHOD

A purchase acceleration technique was used to speed up the adoption of new video viewing technologies.

A blended research approach combined both ethnographic observation and periodic survey queries.





ACCELERATION FINDINGS

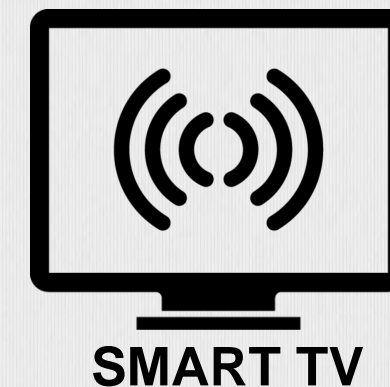


PURCHASES

A total of
63 devices
were purchased by
50 households
with an average
expenditure per
household of
\$870
before subsidization

Most households
only purchased
a single device
37 households
while some
purchased two
13 households

The most frequently
purchased items were

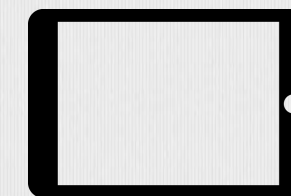


x26



STREAMING DEVICE

x18



TABLET

x11

SUMMARY OF OVERALL FINDINGS



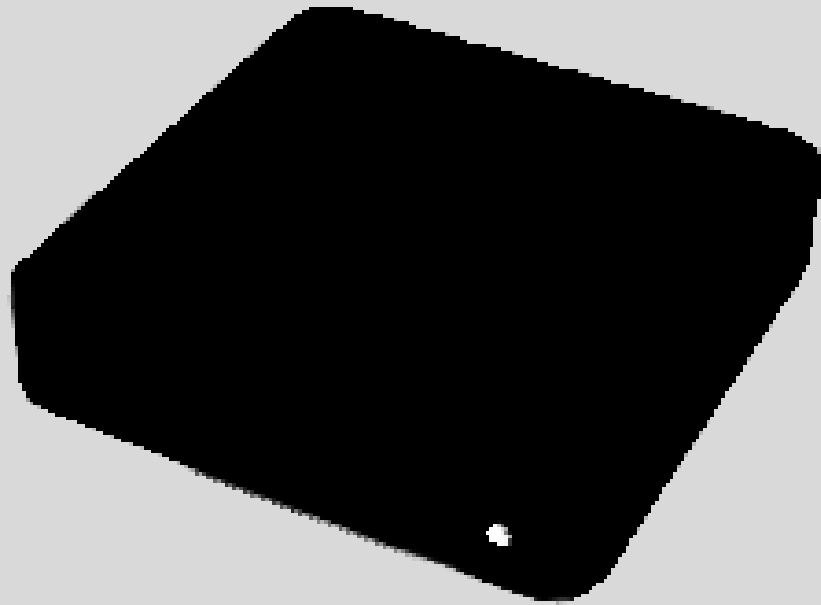
Smart TVs emerged from this study as the viewing device most participants intended to purchase in the near future.

SUMMARY OF OVERALL FINDINGS



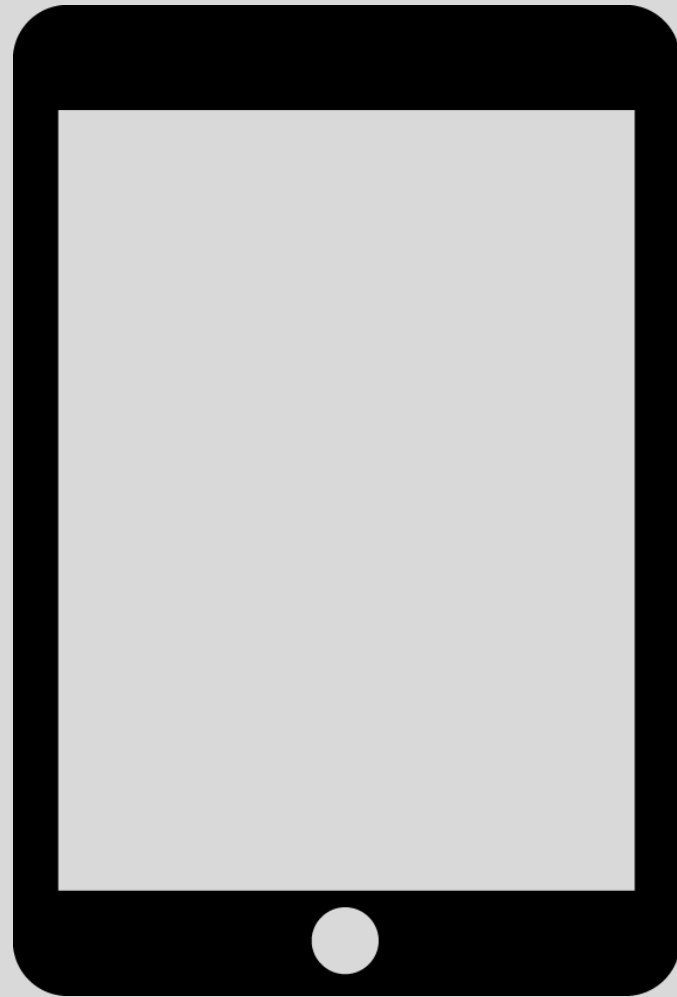
The introduction of a Smart TV drew viewing time away from other devices in the household and became the stimulus for more group viewing.

SUMMARY OF OVERALL FINDINGS



***Streaming Devices
(the 2nd most purchased item)
show the potential to shift
household viewing patterns.***

SUMMARY OF OVERALL FINDINGS



While a new Tablet (the 3rd most purchased device) did not become a primary screen, it tended to establish a solid position in the household device hierarchy.

SUMMARY OF OVERALL FINDINGS



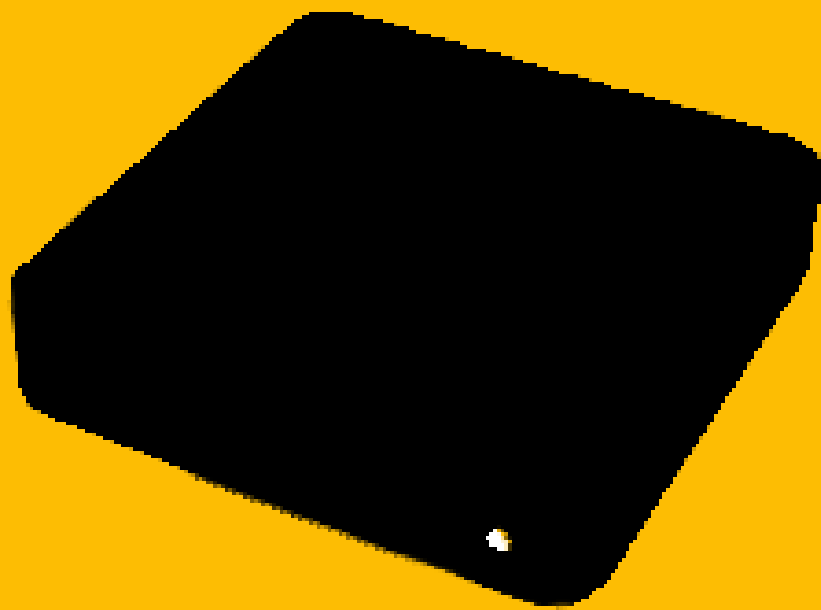
When both a new Smart TV and Streaming Device enter a household, the household focuses on the Smart TV and uses the Streaming Device to supplement a non-Smart TV in another room of the house.

USAGE FINDINGS



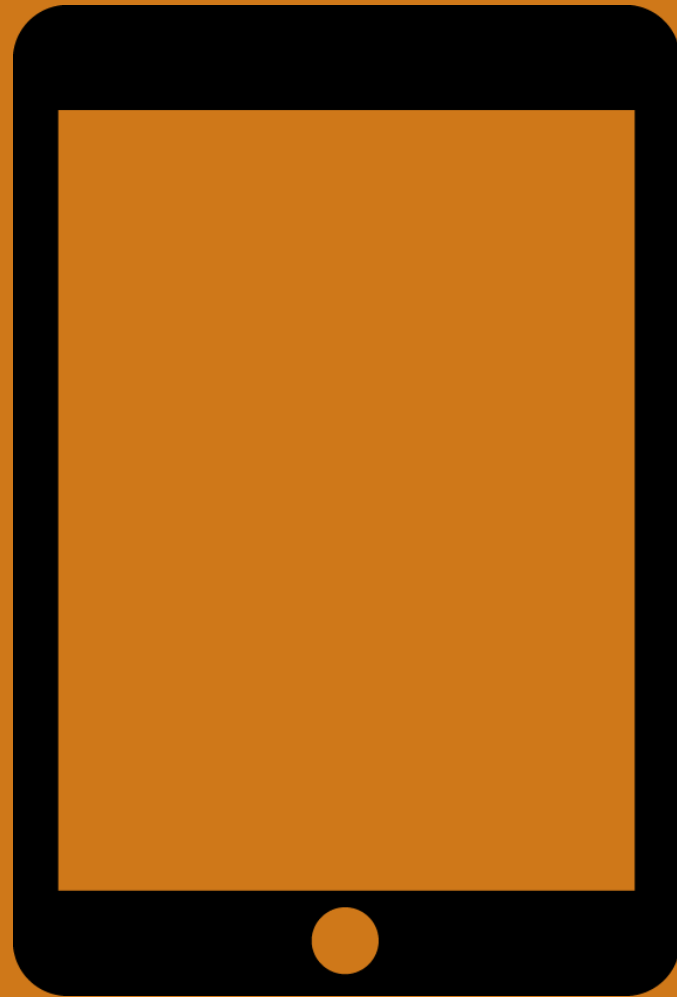
When Smart TVs were introduced into households they became the most used screen for video consumption, reducing the time spent with other devices.

USAGE FINDINGS



***Streaming Devices
(e.g. Apple TV, Roku,
Chromecast) often became
the second most used devices,
decreasing the usage of laptops,
tablets, and game consoles.***

USAGE FINDINGS



Households that purchased a Tablet for the study reported viewing with the device less as the study progressed. Viewing time drifted from the TV to the Tablet and back over the course of the study.

USAGE FINDINGS



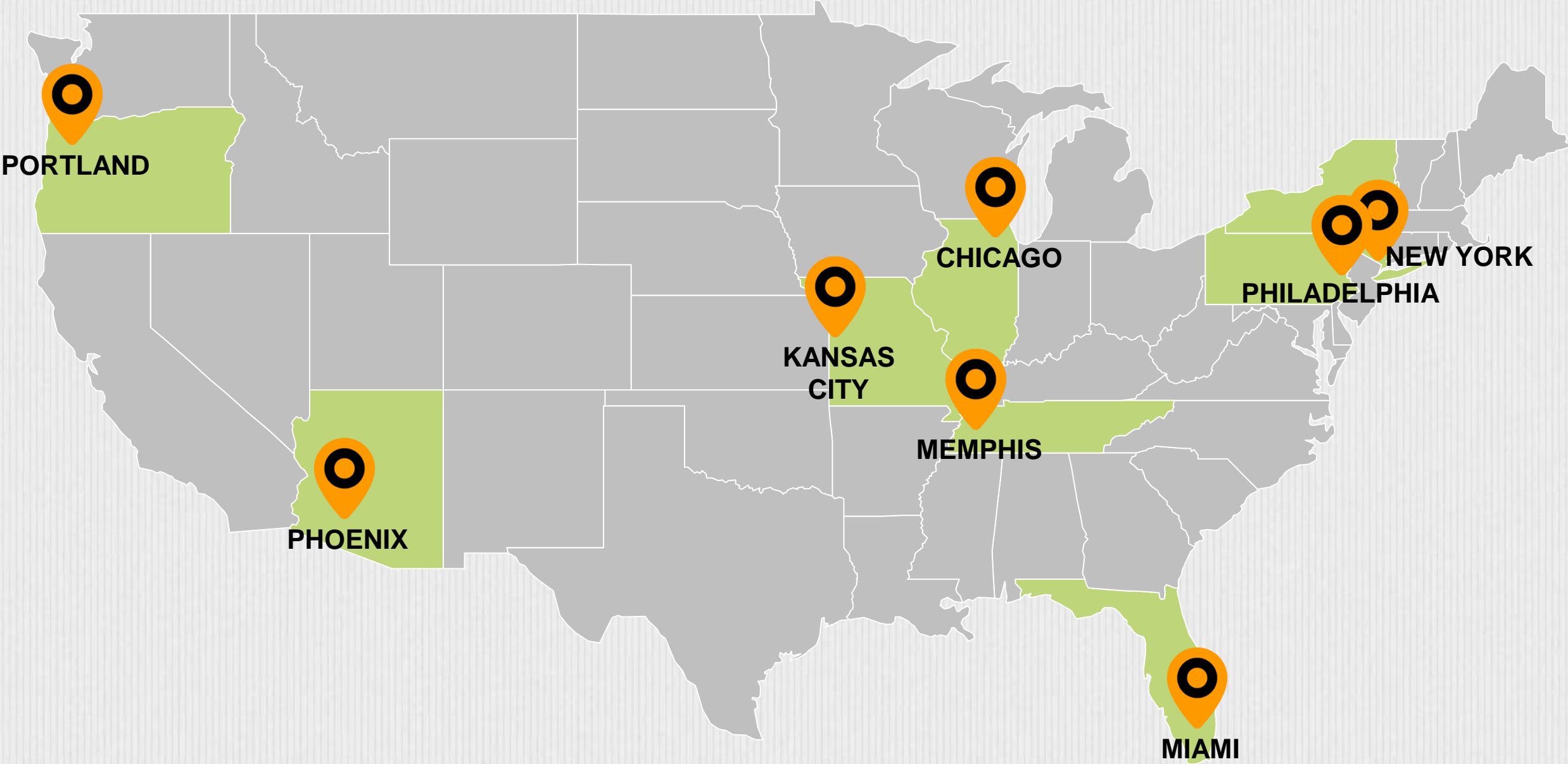
When a Smart TV and a Streaming Device were simultaneously introduced the Smart TV received more viewing time than the Streaming Device.



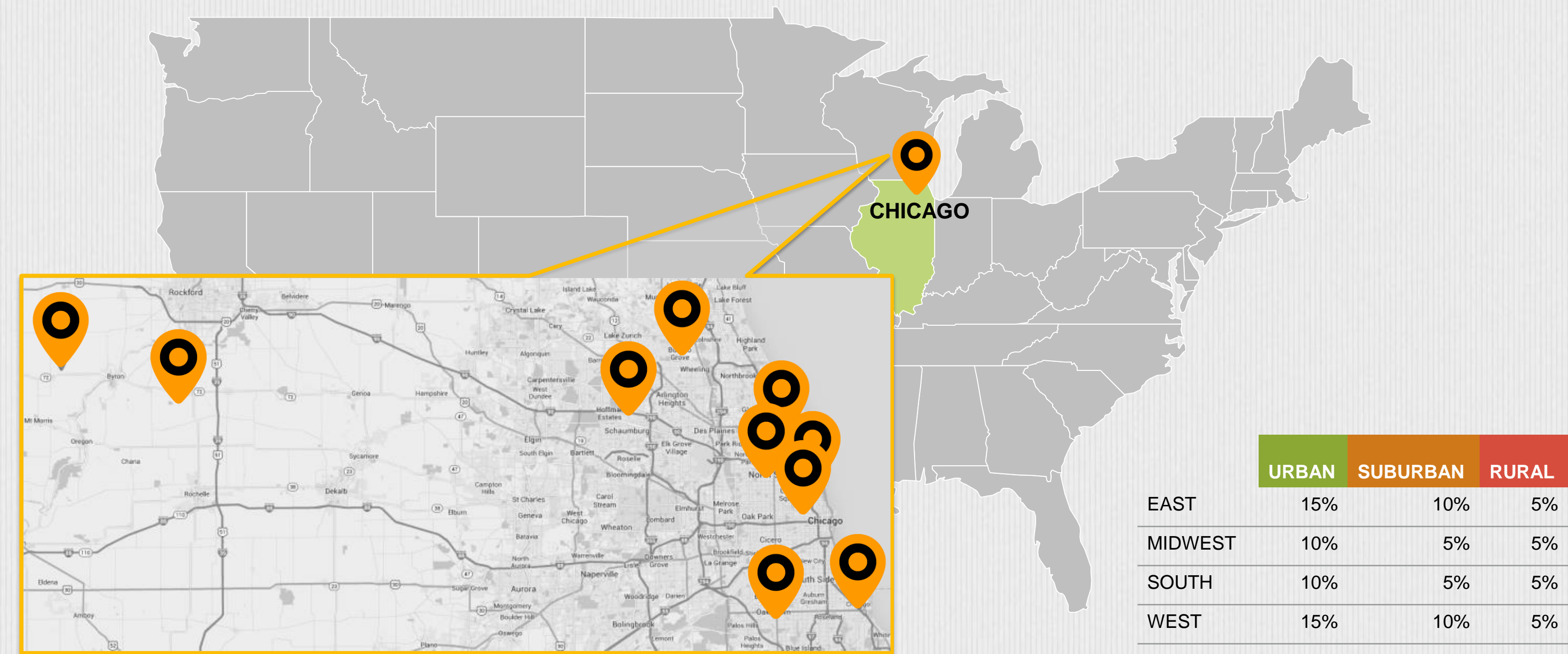
LONGITUDINAL STUDY

Sample

SAMPLE STUDY



LOCAL DISTRIBUTION

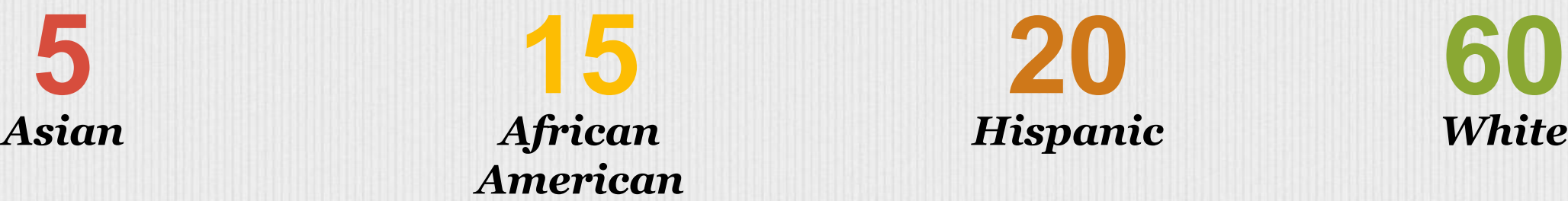


STUDY SAMPLE

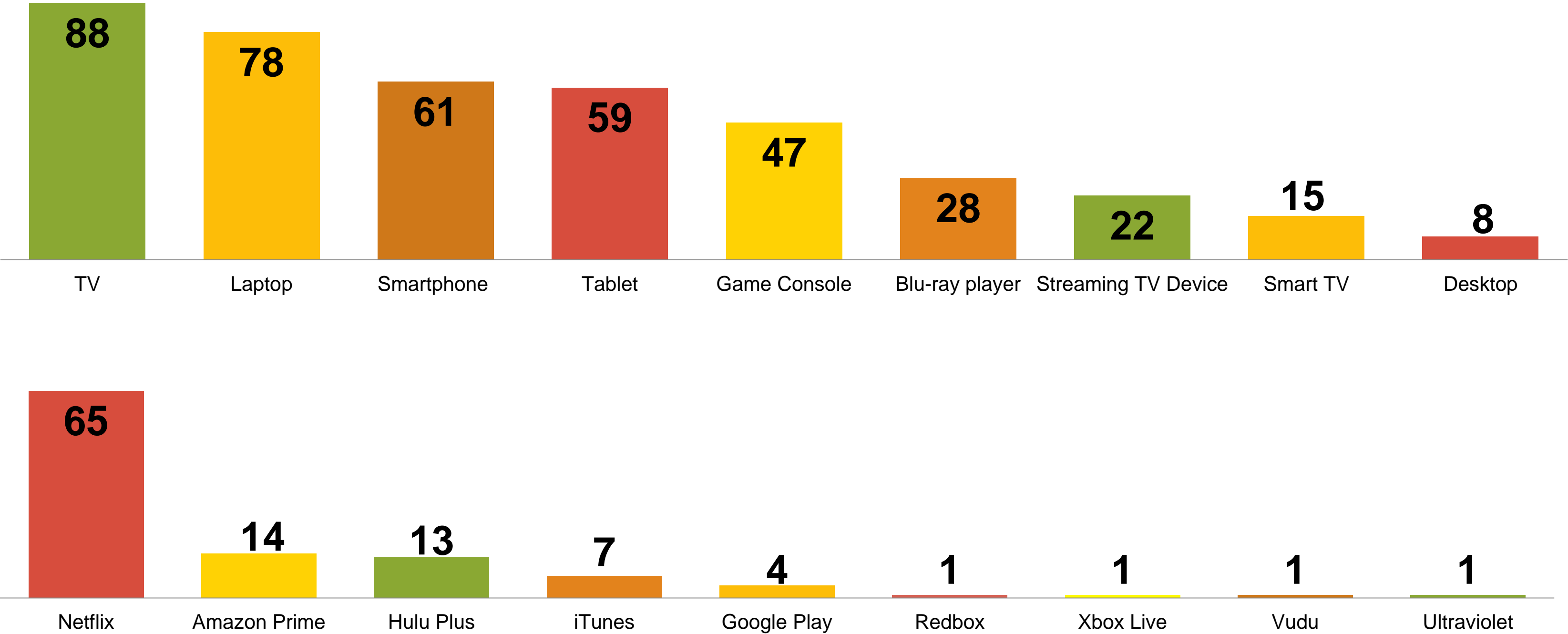
HOUSEHOLD TYPES



DEMOGRAPHICS

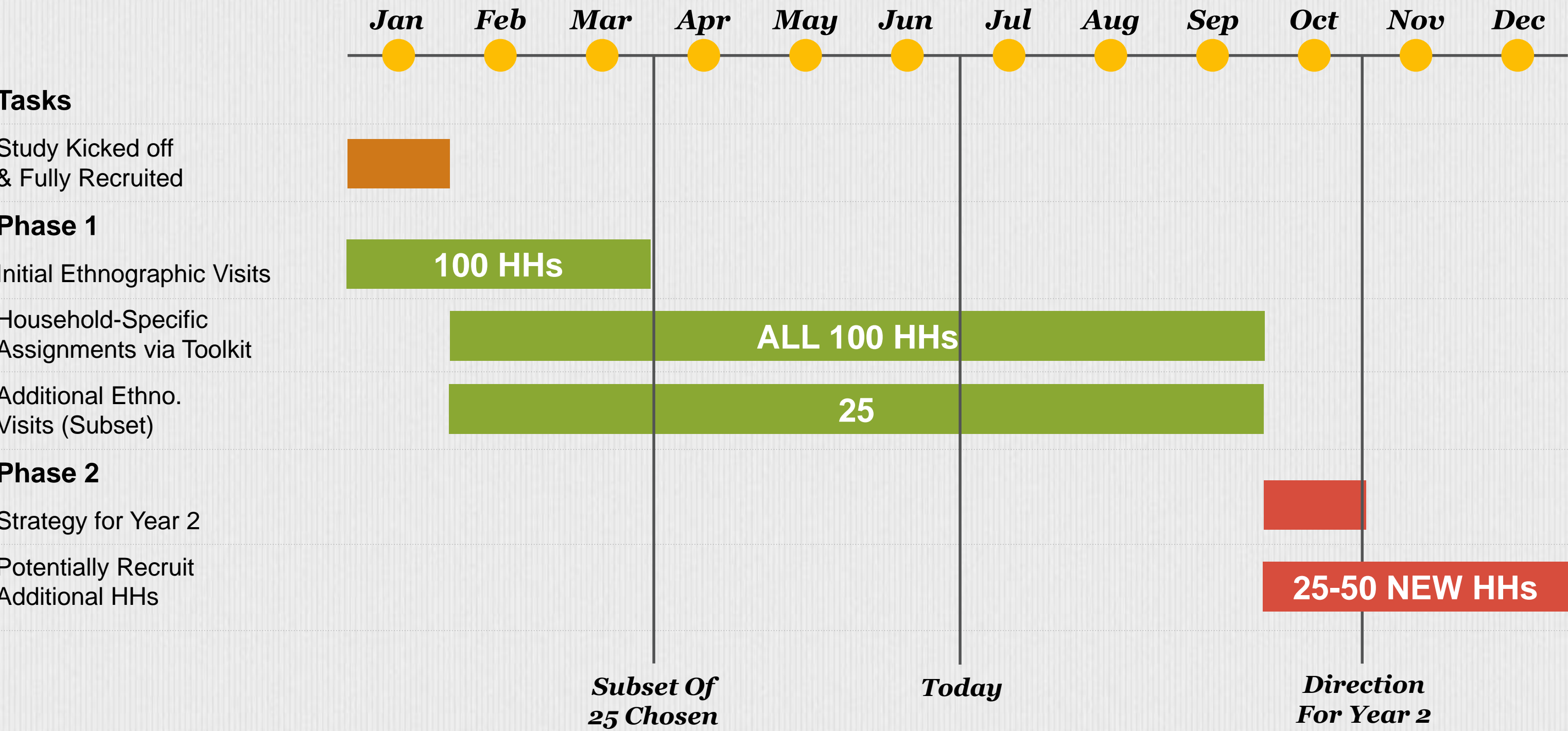


SELF REPORTED DEVICES AND SERVICES



2014 STUDY TIMELINE

100 homes visited at the end of March





LONGITUDINAL FINDINGS

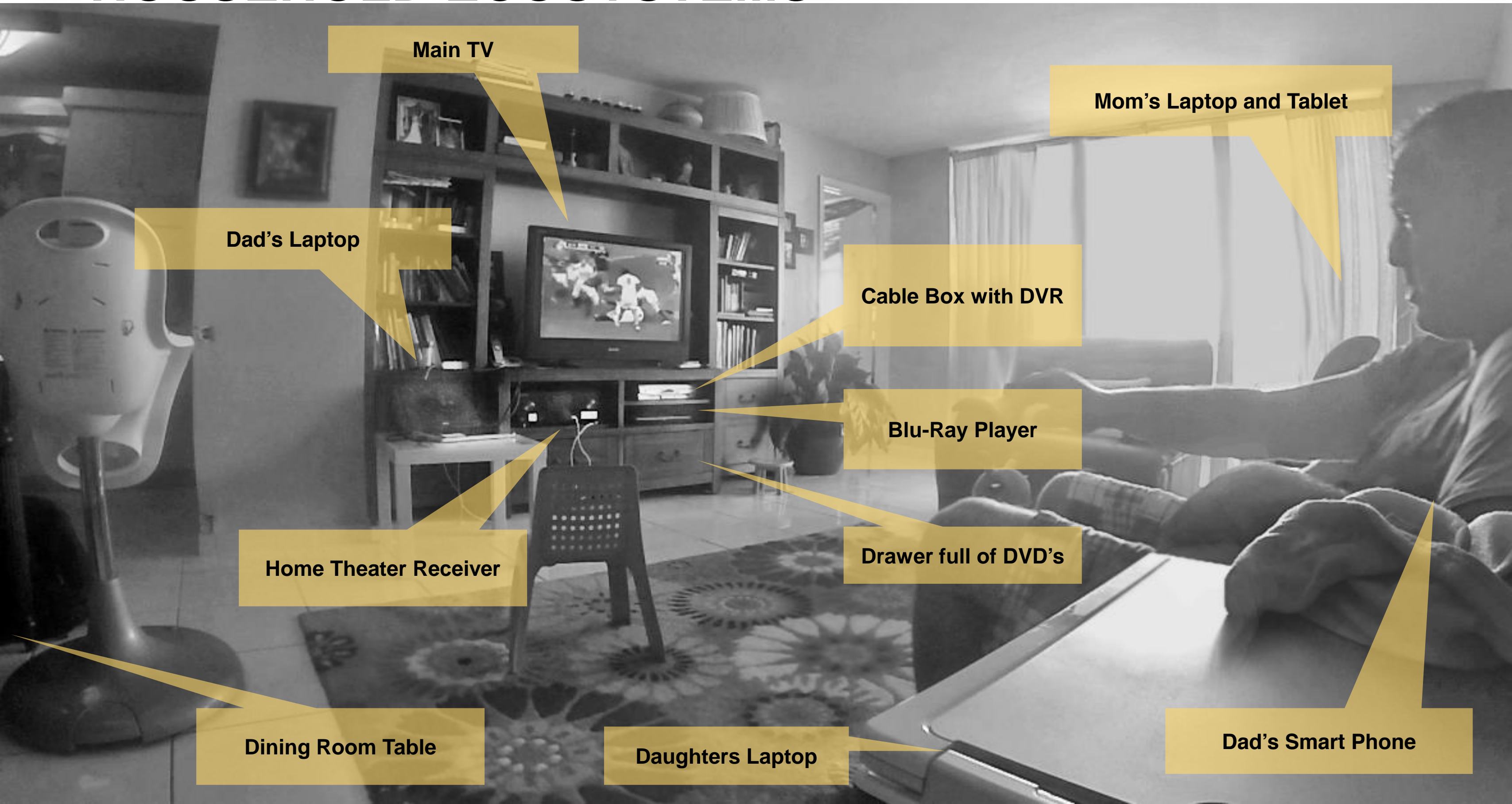


HOUSEHOLD ECOSYSTEMS



In-person ethnographies revealed a high level of complexity in ecosystems and behaviors.

HOUSEHOLD ECOSYSTEMS



Main TV

Mom's Laptop and Tablet

Dad's Laptop

Cable Box with DVR

Blu-Ray Player

Home Theater Receiver

Drawer full of DVD's

Dining Room Table

Daughters Laptop

Dad's Smart Phone

HOUSEHOLD ECOSYSTEMS



Consumers are still developing mental models of device and service pairings.

HOUSEHOLD ECOSYSTEMS

Main TV

Home Theater Receiver

Cable Box

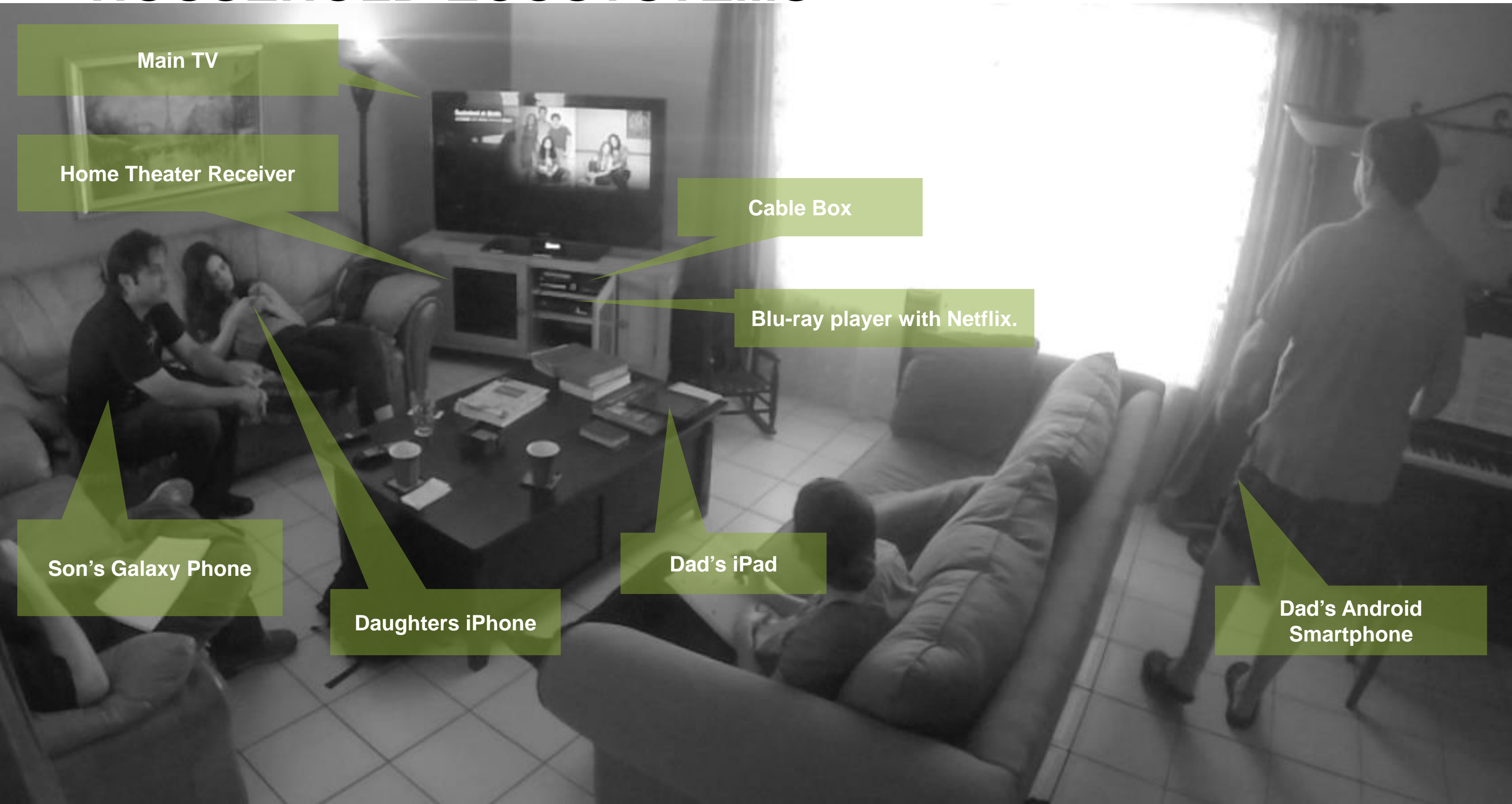
Blu-ray player with Netflix.

Son's Galaxy Phone

Daughters iPhone

Dad's iPad

Dad's Android Smartphone

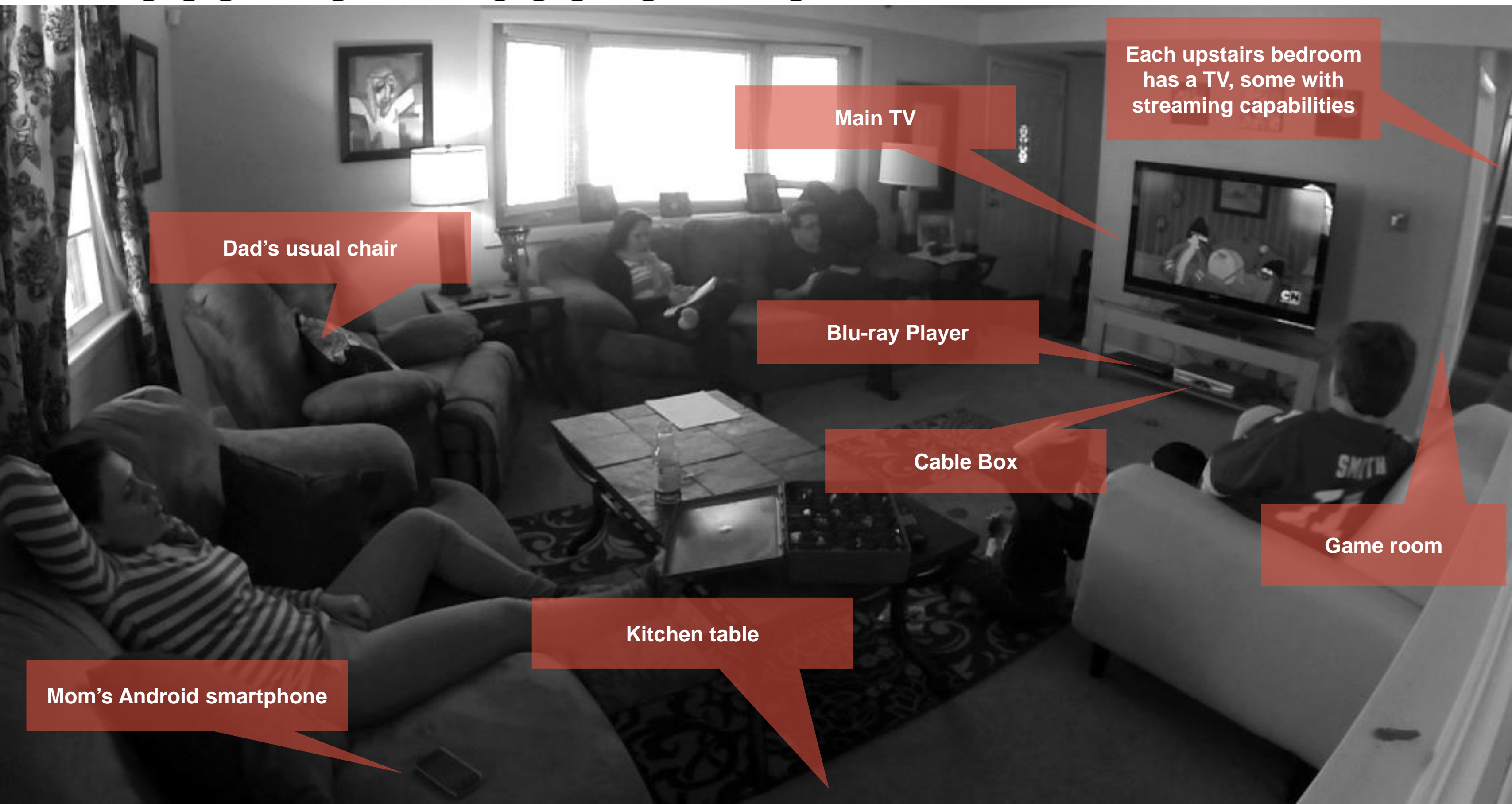


HOUSEHOLD ECOSYSTEMS



Many households have multiple “main” viewing devices, depending on the activity and group.

HOUSEHOLD ECOSYSTEMS



Dad's usual chair

Main TV

Each upstairs bedroom has a TV, some with streaming capabilities

Blu-ray Player

Cable Box

Game room

Mom's Android smartphone

Kitchen table

HOUSEHOLD ECOSYSTEMS



Portable devices create new flexibility in viewing environments.

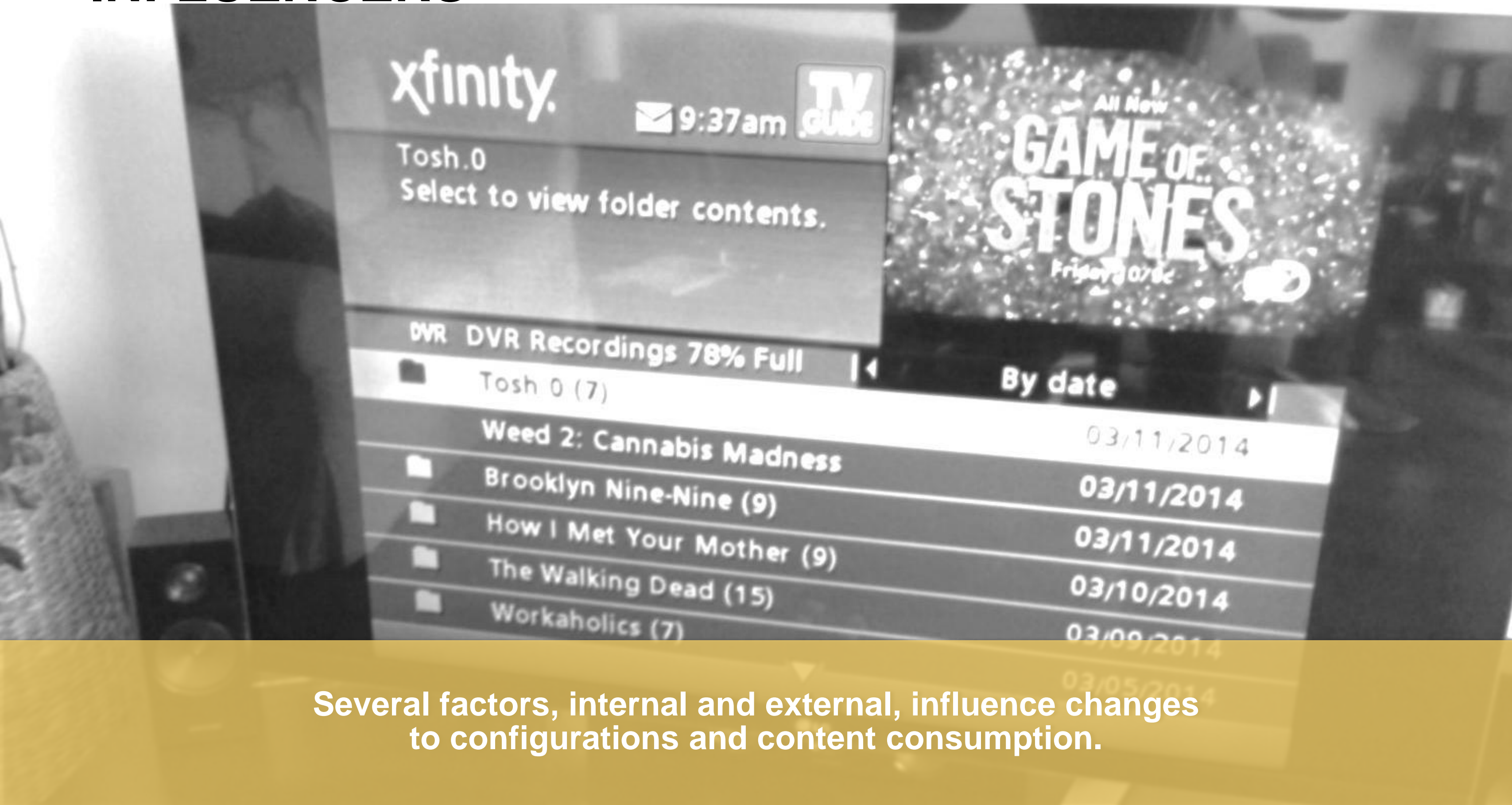
HOUSEHOLD ECOSYSTEMS



Laptop

iPhone

INFLUENCERS



Several factors, internal and external, influence changes to configurations and content consumption.

INFLUENCERS

**Content is a
primary driver.**

**The ability to stream
and cast is compelling.**

**Exposure to
advertisements and
popular media
informs and influences.**



INFLUENCERS

Household members, family, and friends often act as agents of change.

Young children, teens, and “boomerang” young adults are influencing technology purchases and subscription choice.



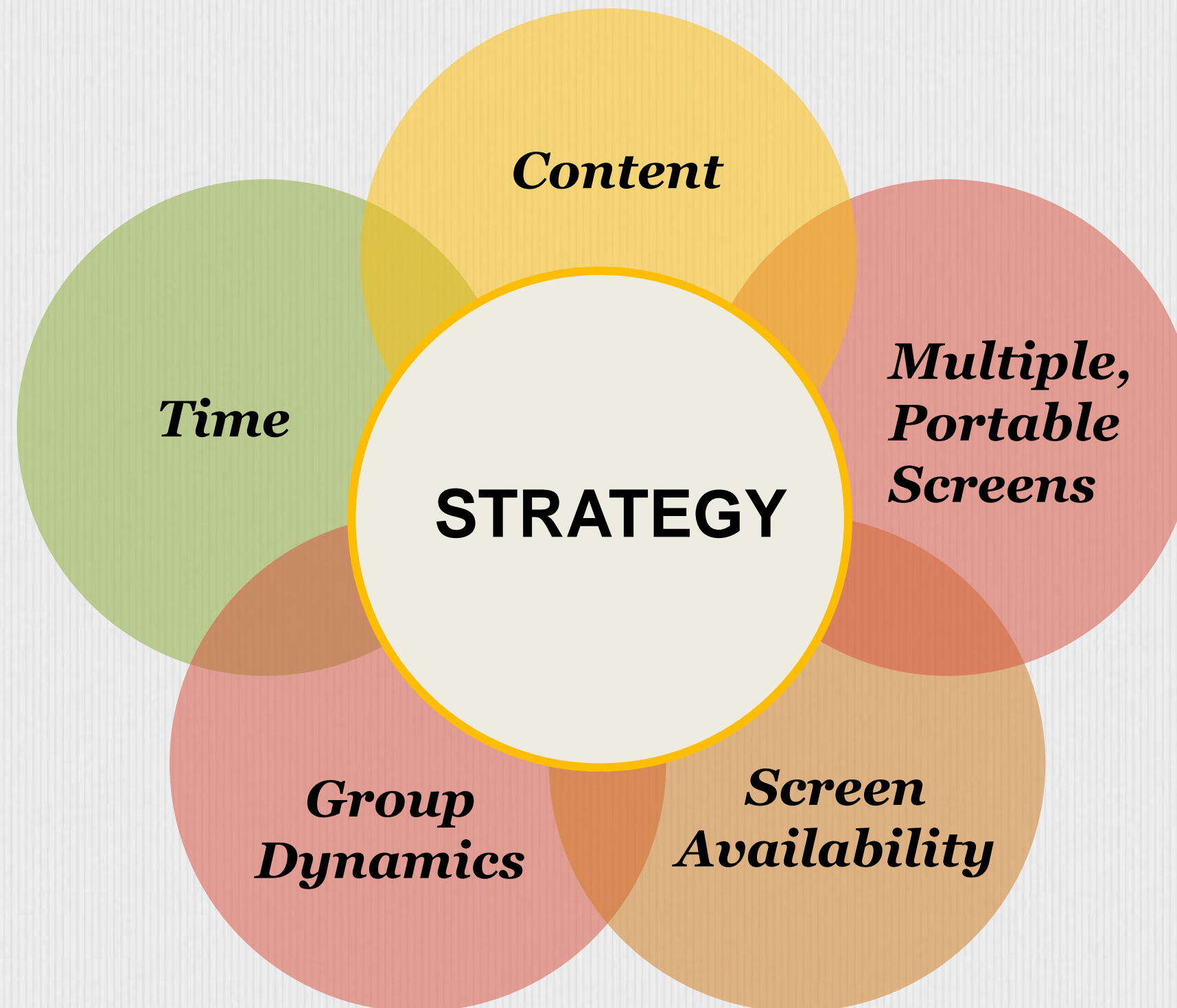
VIEWING STRATEGIES AND APPROACHES



Ecosystem configurations facilitate multiple viewing strategies and approaches.

CHOOSING A STRATEGY

Any of these factors can take priority depending on the circumstances.



STRATEGY: ATTENTIVE CO-VIEWING

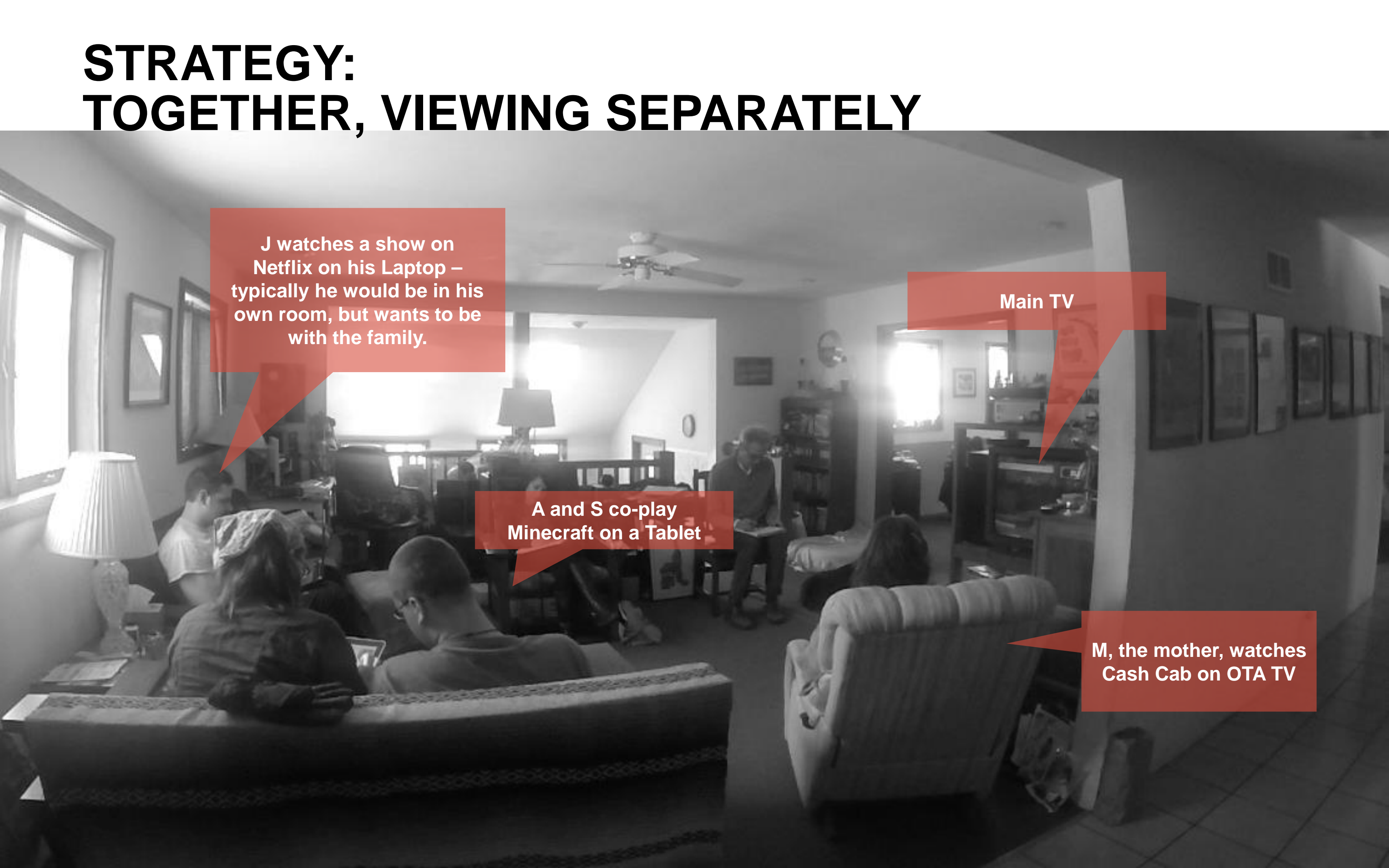
They watch the main TV during weekday evenings when they are home together. They view separately in their bedrooms on laptops between 9-10pm.

Content is accessed through On Demand, via Cable Box

J's (Apple) Laptop, with blog page loaded



STRATEGY: TOGETHER, VIEWING SEPARATELY



J watches a show on Netflix on his Laptop – typically he would be in his own room, but wants to be with the family.

A and S co-play Minecraft on a Tablet

Main TV

M, the mother, watches Cash Cab on OTA TV

STRATEGY: SOCIAL VIEWING

Laptop used for short-form video, especially during commercial breaks and half time

Projector is used as the main TV

R and C, the parents in the household, are in and out of the room while they fix dinner.

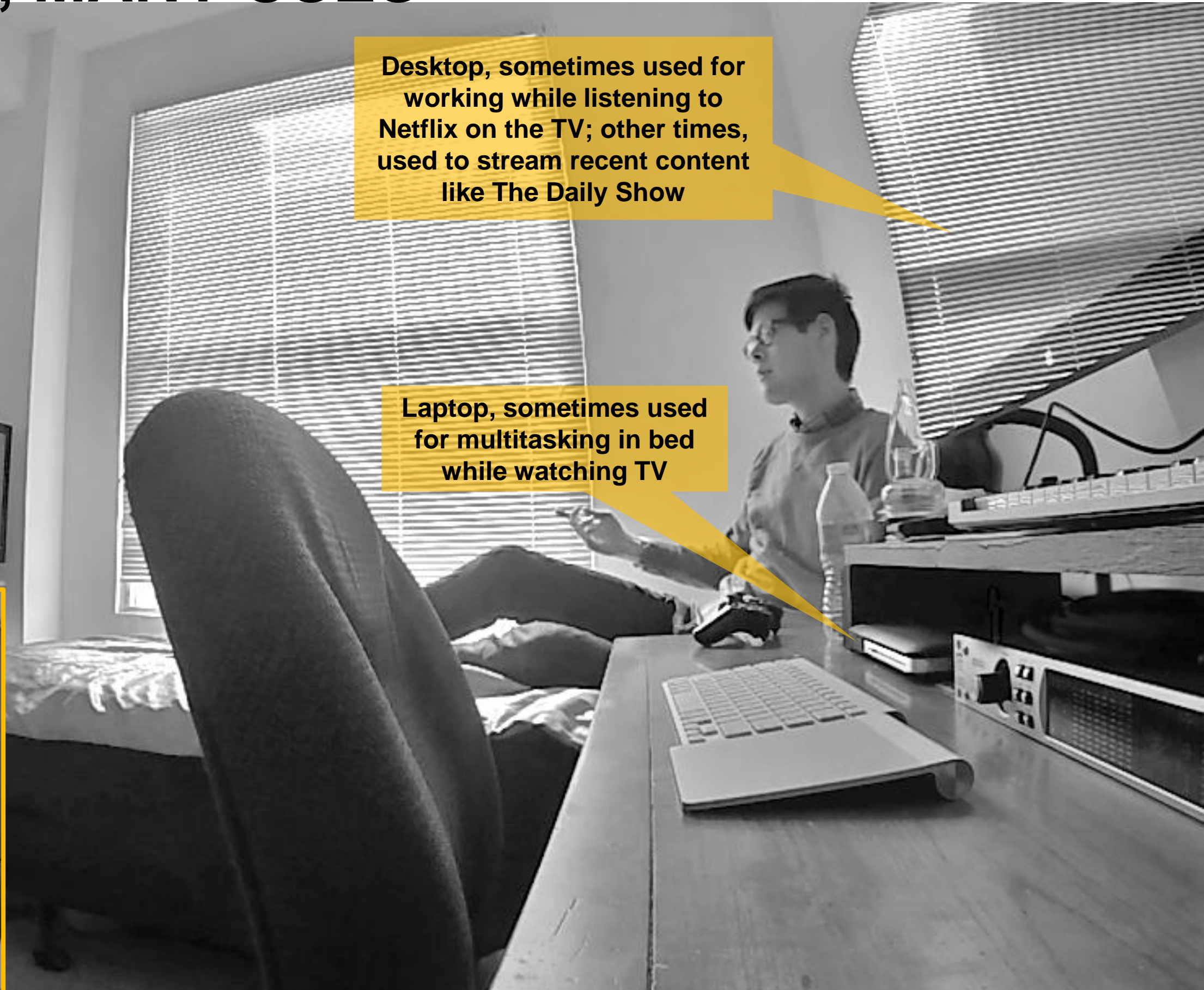


STRATEGY: SINGLE SOURCE, MANY USES

M watches The Office reruns on Netflix via his PS2 for background noise

Desktop, sometimes used for working while listening to Netflix on the TV; other times, used to stream recent content like The Daily Show

Laptop, sometimes used for multitasking in bed while watching TV



STRATEGY: VIEWING IMMERSION

L's friend is
focused on 24

The main TV, a projector,
plays 24, from the DVR

Muted sports game in
background. This TV is
constantly utilized for
this purpose

L (home owner) uses his Tablet
to check out social media or
follow sports scores during the
show.





SPECIAL TOPIC

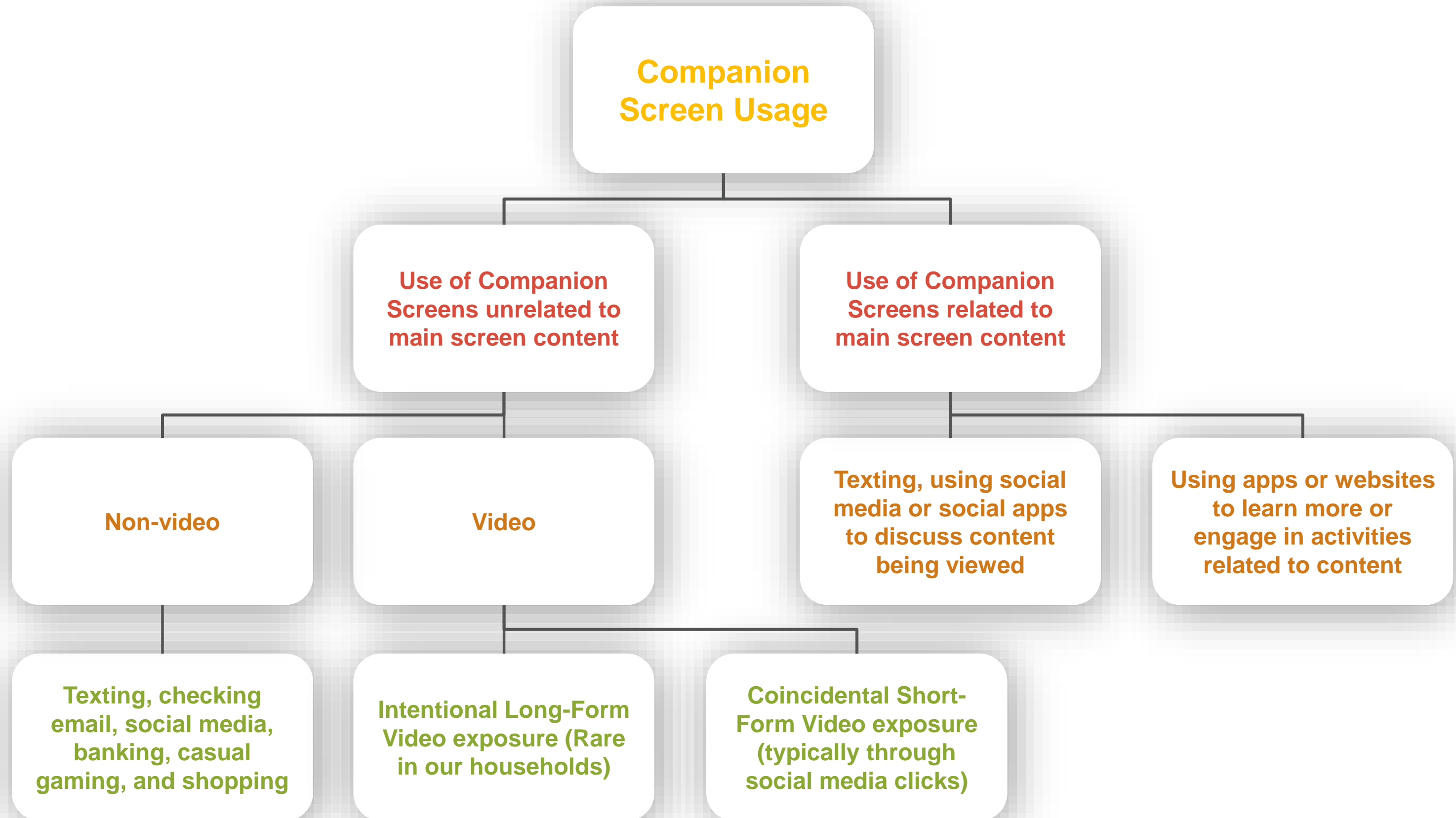
Companion Screen Use

COMPANION SCREENS



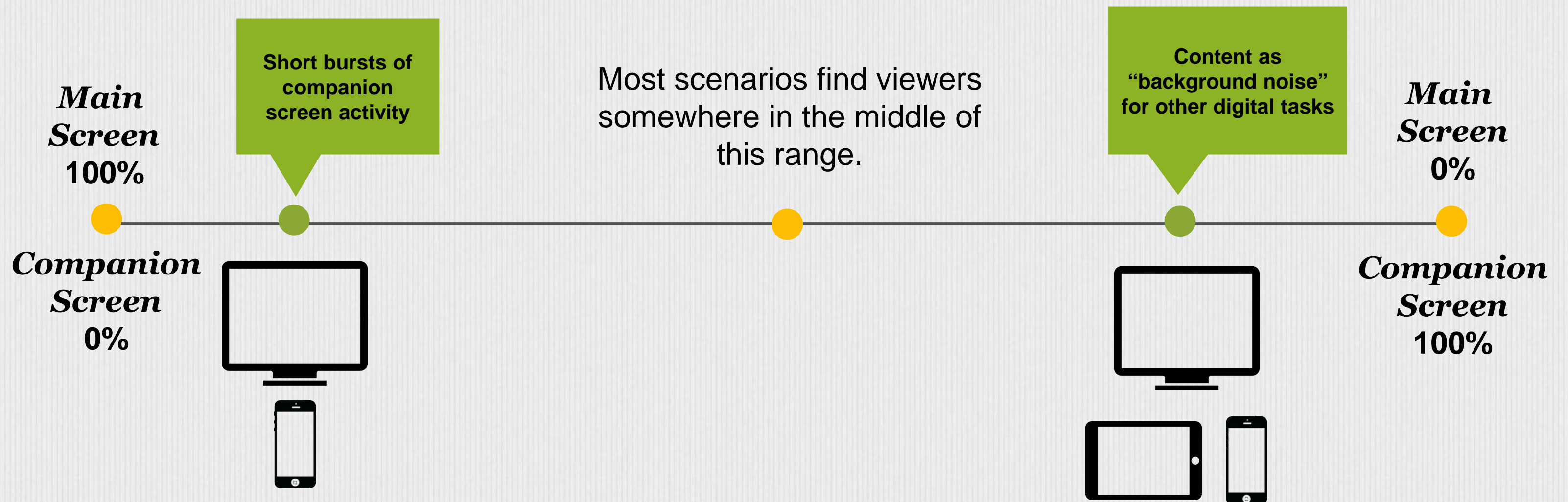
Second, and sometimes third screens, are used while viewing the main screen, typically a TV.

USE OF COMPANION SCREENS



UNRELATED COMPANION SCREEN USE

Smartphones, laptops, and tablets are used while viewing a main screen frequently and for a variety of reasons.



COINCIDENTAL SHORT-FORM VIDEO EXPOSURE

Infrequently, companion screen activities result in coincidental concurrent video viewing.

Short form video comes from many sources:

facebook



You Tube



“The videos in YouTube are short and I am able to watch YouTube during a commercial when I am watching live TV and if the TV is in DVR mode YouTube is very convenient and fast.”

Mom in her forties

“I like YouTube because it passes the time during commercials.”

Teen daughter

INTENTIONAL LONG-FORM VIDEO EXPOSURE

In certain circumstances, a single viewer uses multiple devices to view multiple forms of content.





“HYPER VIEWING”

Special viewing events and favorite shows promote hyper viewing behaviors.

- > Simultaneous, multi-screen usage and mobile viewing are more pronounced.
- > Continuous conversation via social media, IM, in-person, and remote chats.
- > Events and shows prompt people to explore and use applications, websites, and new platforms.
 - For many, new platforms provide an enhanced viewing experience.

“I can email, IM, and tweet... talk to people. It’s fun to socialize with people and interact with them while I’m watching.”

Young Mom in her early thirties

“On my lunch break I’ll sit out and watch some of the games on my phone and I’ll have my bracket with me. ”

Couple – the young man in his mid thirties

“The NCAA app allows me to see the game, and at the bottom you see the stats. The app allowed me to watch live!”

Young single man

IMPLICATIONS TO CONSIDER

- 1 TV is considered the primary screen in the home.
- 2 Portable devices are used for video throughout the household.
- 3 Households are seeking ways to access streaming content.
- 4 Consumers have moved from a single source, single device mental model to a multi-source, multi-device mental model.
- 5 Many households are heavily engaged in time-shifted viewing.
- 6 The number of viewers may change multiple times during viewing sessions given group dynamics.

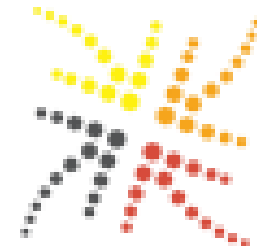
IMPLICATIONS TO CONSIDER

- 7 Multiple screens may be in use for video viewing in the same room by multiple people.
- 8 Personal devices are sometimes viewed by more than one person at the same time.
- 9 Companion screens can fuel engagement with content.
- 10 Alternatively, companion screens can distract attention away from content if they are used to do things unrelated to the content being viewed.
- 11 Multiple forms of social media are used to learn and engage with content; however, content being followed via social media may be different from the content being viewed (e.g., tweeting about *Scandal* while watching *South Park*).
- 12 People initiate streams from many different sources (e.g., links sent via Facebook, Twitter, or network application).



CRE RESPONSE





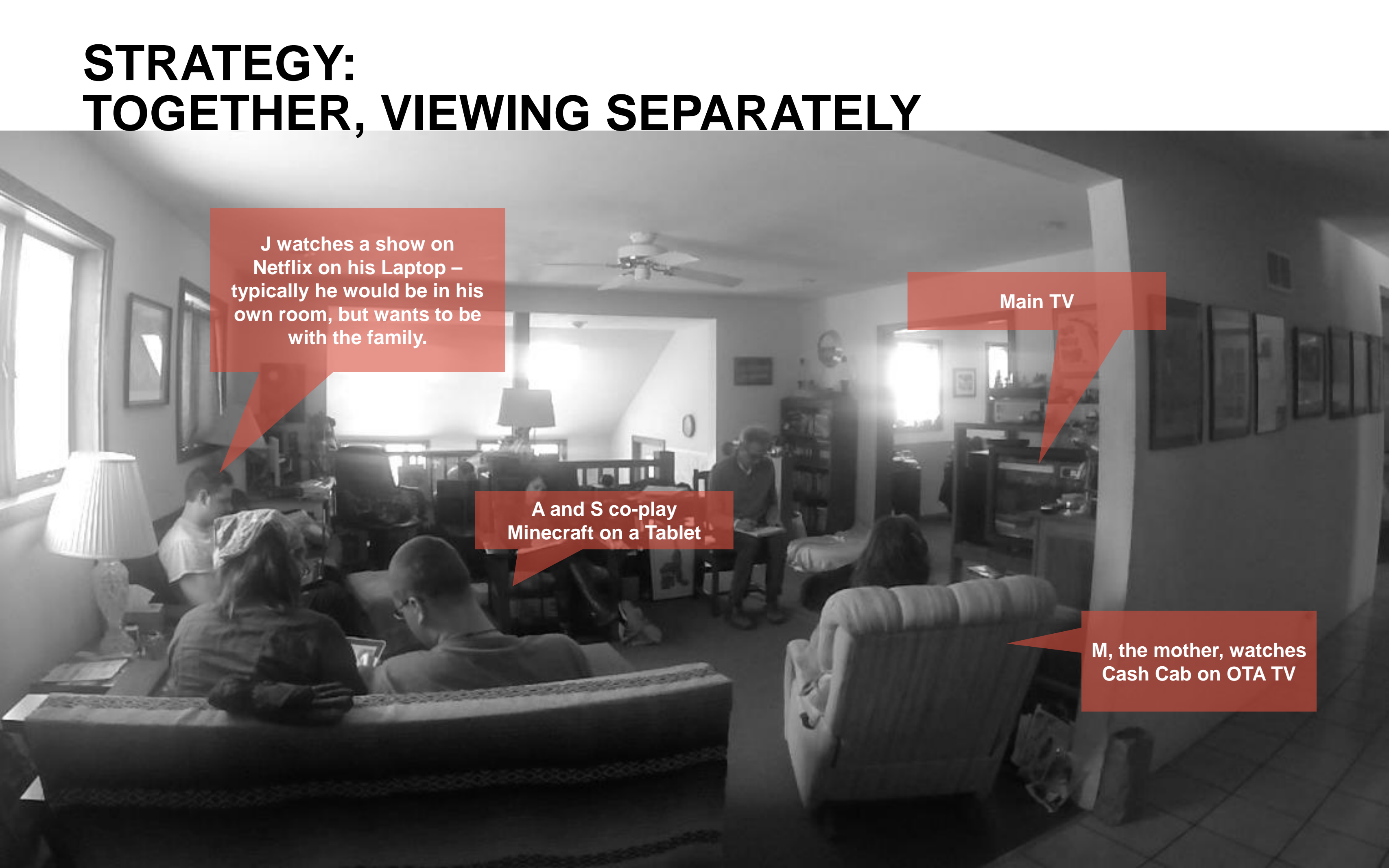
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CHERYL BRINK

VP, Digital Research & Analytics
Scripps Networks Interactive

STRATEGY: TOGETHER, VIEWING SEPARATELY



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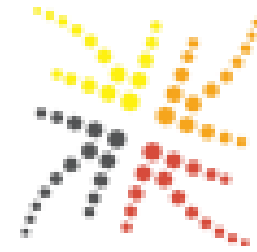
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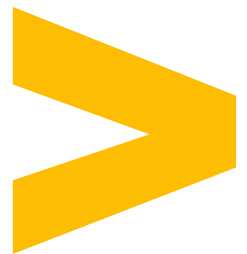


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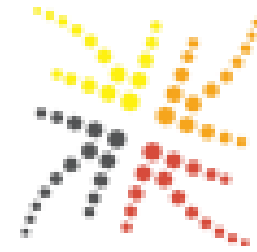
LAURA COWAN

Acceleration Committee Chair
Director Analytics and Insight
MEC Global



QUESTIONS





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PANEL DISCUSSION

BRAD ADGATE

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Research

Horizon Media, Inc.

BRYON SCHAFER

Senior Vice President
Media Research & Insights

Warner Bros. Television Group

ERIC SOLOMON

Senior Vice President
Global Audience Measurement

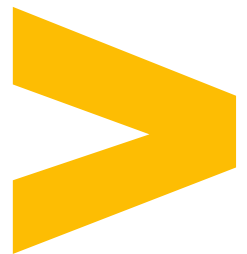
Nielsen

DAVID TICE

Senior Vice President
GfK

RICHARD ZACKON

CRE Facilitator



THANK YOU

