



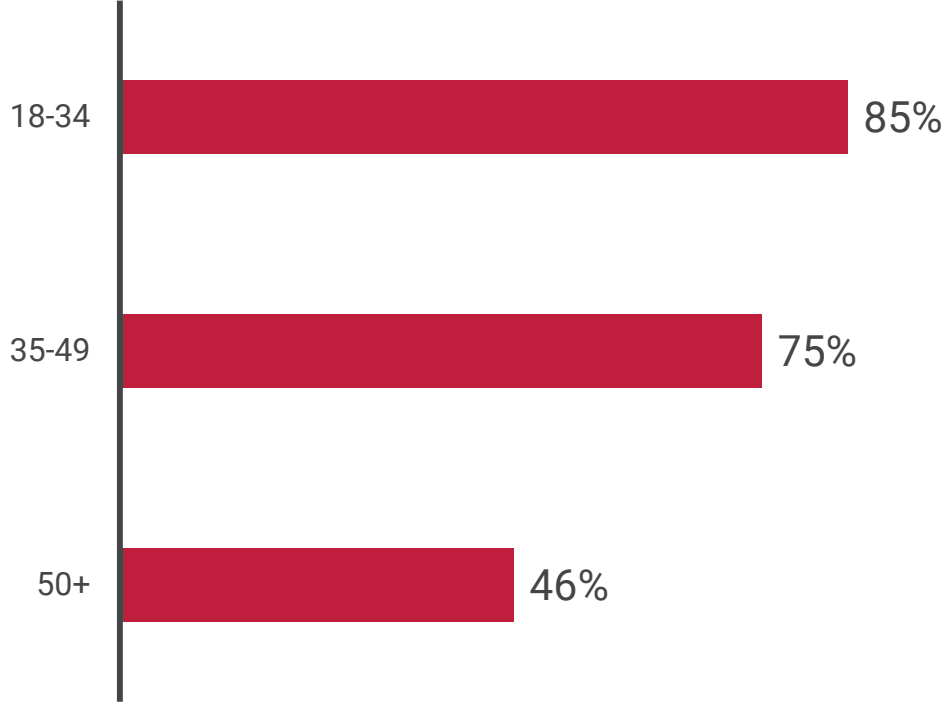
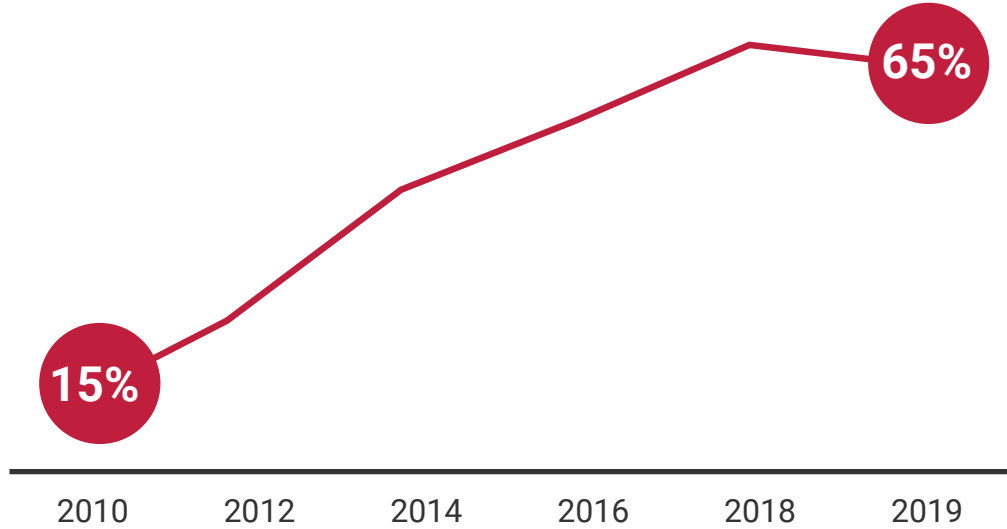
THE **HUMAN** APPROACH IN THE AGE OF BIG DATA

Combining Qualitative, Quantitative and
Eye-Tracking Research to Deliver Insights for
Brands, Advertisers and Media Companies

STREAMING HAS BECOME THE NORM

Incidence of TV Content Viewers 18+ Who Stream

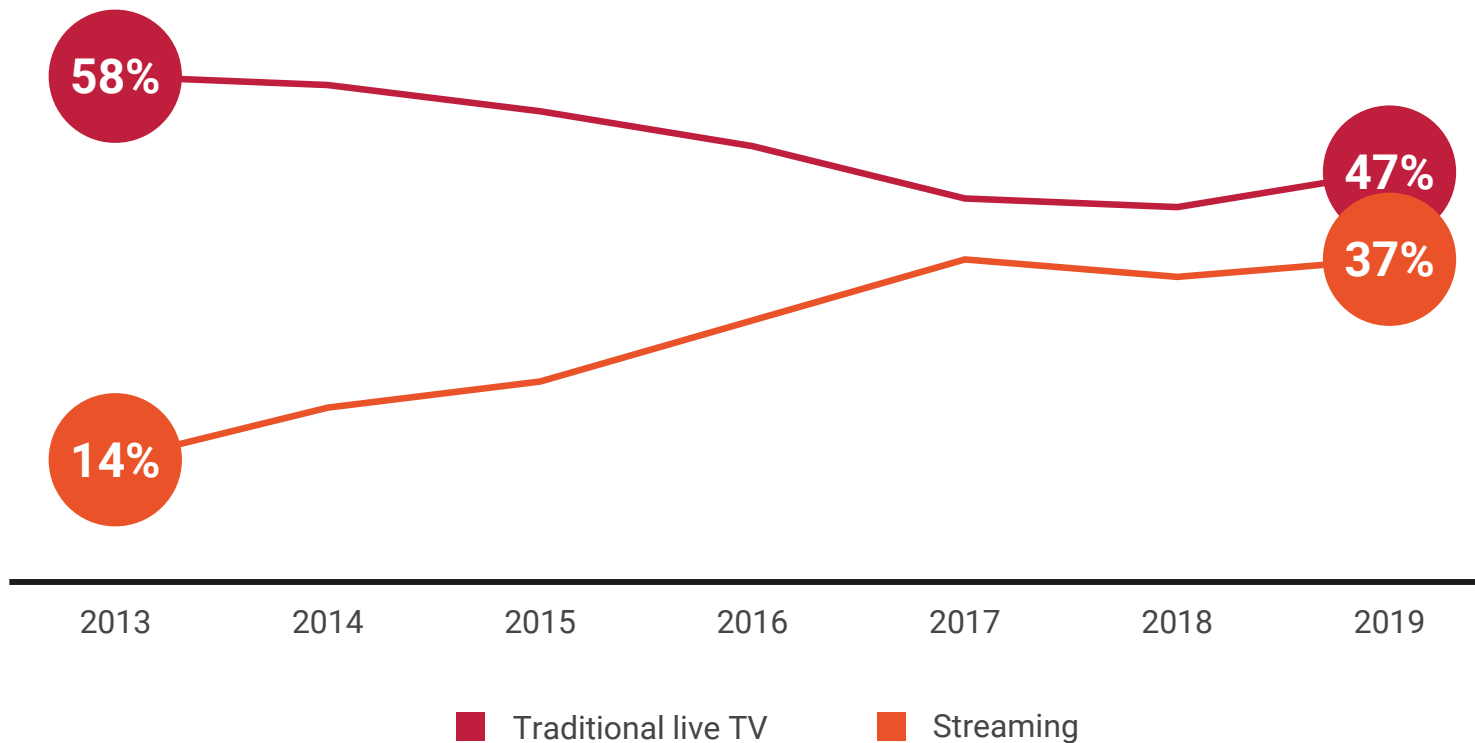
Base: TV Content Viewers 18+



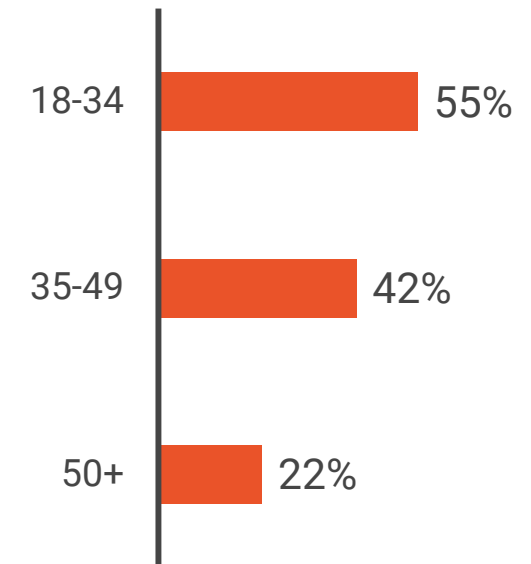
LIVE VIEWING HAS DECLINED, BUT HAS BEGUN STABILIZING

Share of Weekly Viewing

Base: TV Content Viewers 18+



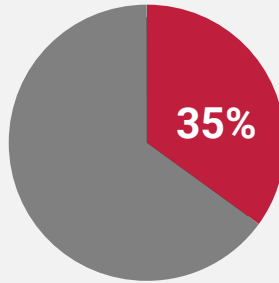
Percent of Weekly TV Viewing Streamed



VIEWING SEGMENTS

THE 5 O'CLOCK DINERS

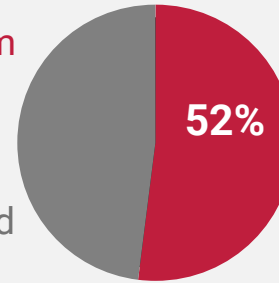
Traditional Only viewers (viewers who watch TV content only by using traditional sources; no streaming)



56.8	56%	\$57.9K
AVG AGE	FEMALE	AVG INCOME
14%	6.1	91%
KIDS IN HH	HRS TV/DAY	MVPD

THE CONTENT OMNIVORES

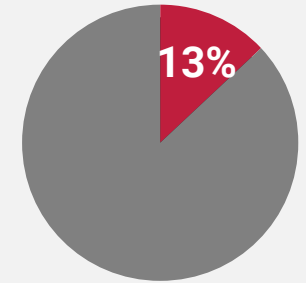
Traditional + Stream viewers (viewers who use both traditional – live/DVR/VOD – and streaming sources)



41.0	46%	\$62.8K
AVG AGE	FEMALE	AVG INCOME
38%	6.4	87%
KIDS IN HH	HRS TV/DAY	MVPD

THE CONTENT PALEOS

Stream Only viewers (viewers who only consume TV content via streaming; no traditional sources)



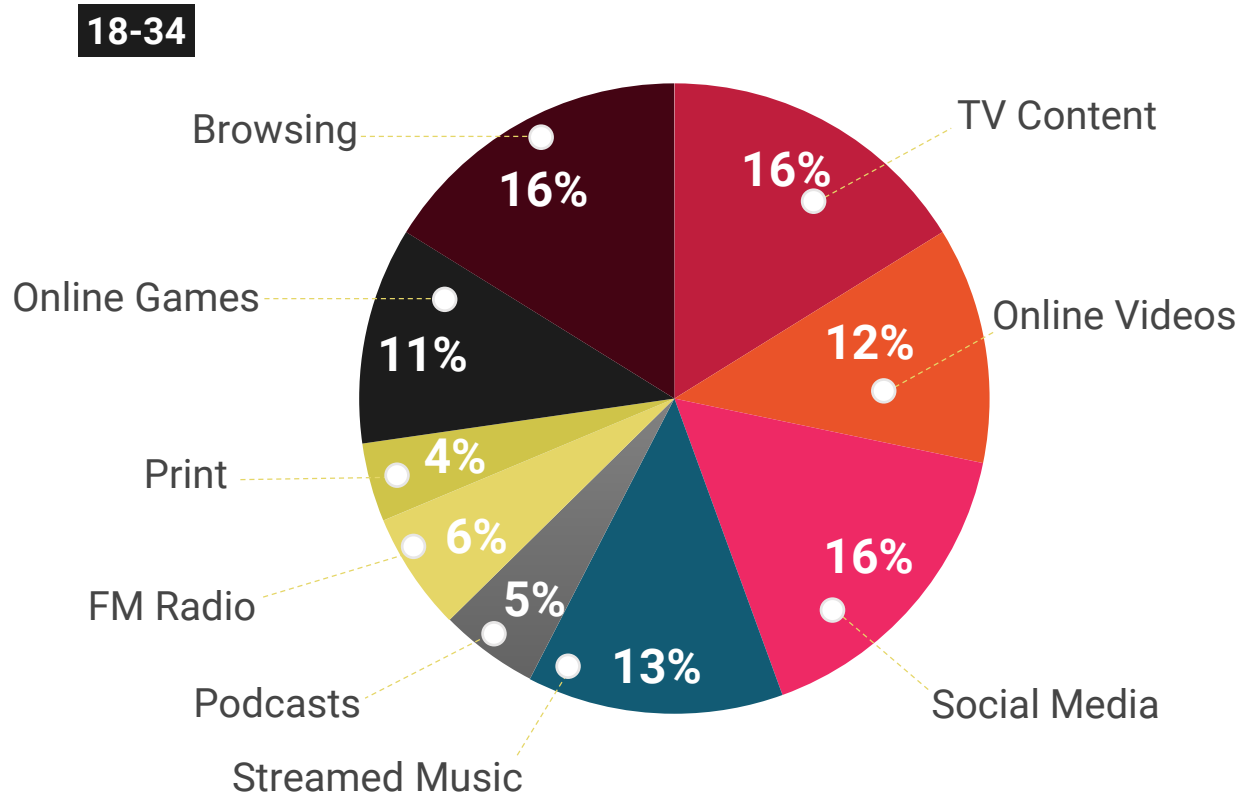
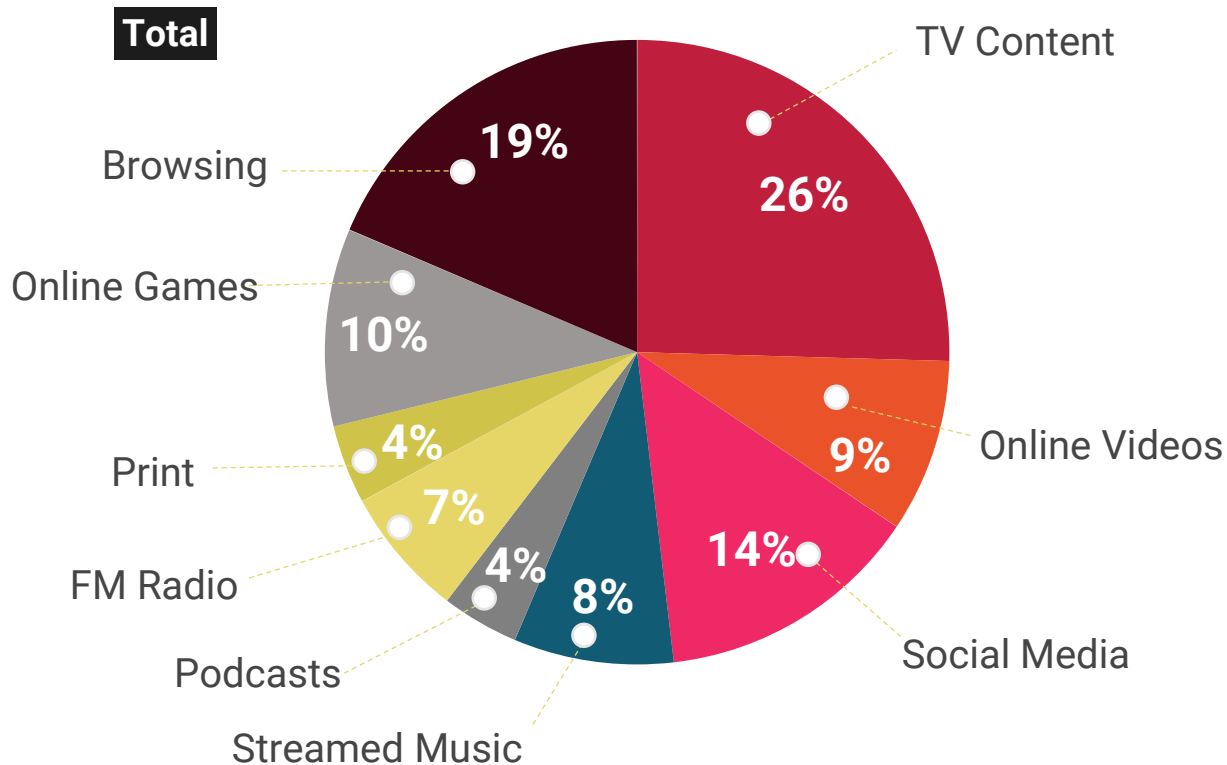
41.8	59%	\$55.6K
AVG AGE	FEMALE	AVG INCOME
25%	5.3	38%
KIDS IN HH	HRS TV/DAY	MVPD

Over-index Under-index

TV STILL MAKES UP A QUARTER OF MEDIA TIME, BUT THERE'S SO MUCH MORE TO DO!

Percent of Weekly Hours with Content

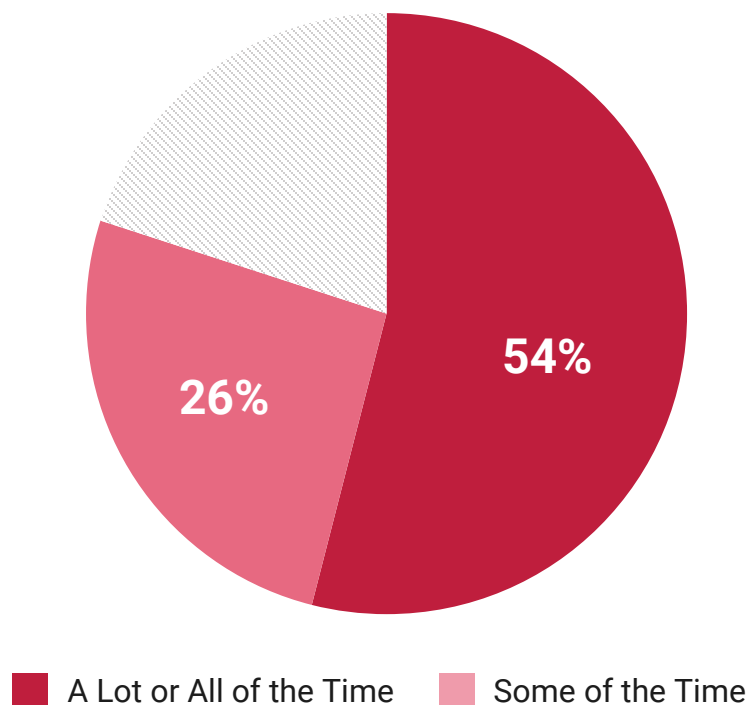
Base: Total Respondents



IN THIS FRAGMENTED WORLD, MULTITASKING IS THE NORM

Incidence of Using Another Device While Watching TV

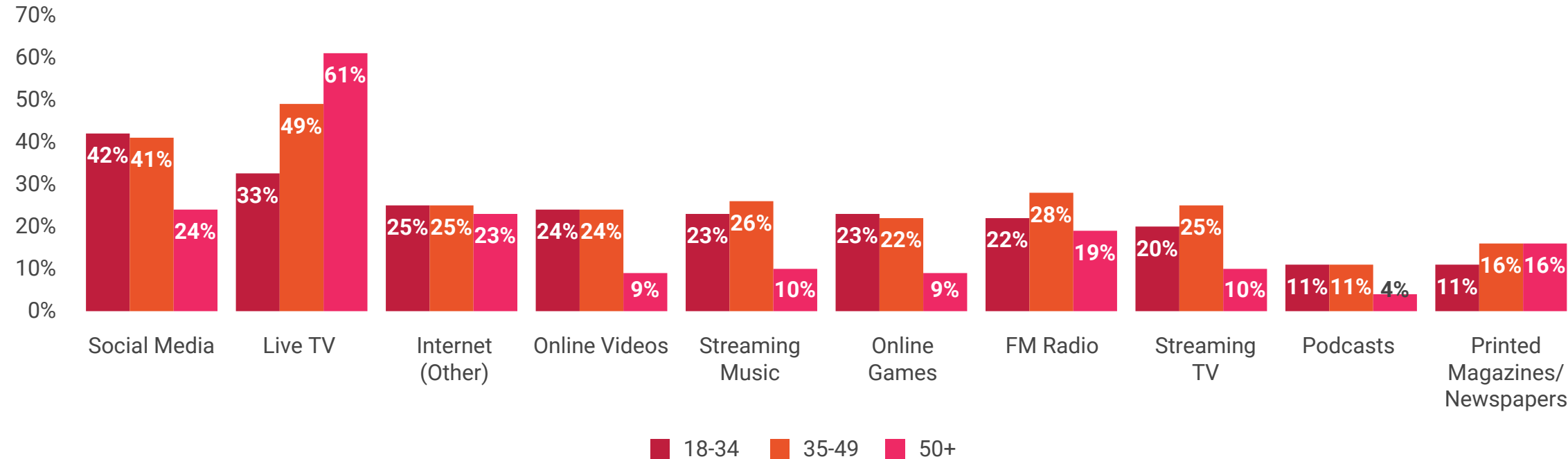
Base: TV Content Viewers 18+



MORE PLATFORMS MEAN MORE VEHICLES FOR ADVERTISING, BUT WHICH PLATFORMS WORK BEST?

Platform Where Consumers Perceive Seeing the Most Ads

Base: Total Respondents



IN THIS MULTISCREEN WORLD...

How do we make sense of the relationship between viewership, engagement, eyes-on-screen, and attention?



WHAT METHOD TELLS US THE TRUE STORY?



RATINGS



BIG DATA



SURVEY RESEARCH



EYE TRACKING



BIOMETRICS



**ETHNOGRAPHY/
QUALITATIVE**

UNDERSTANDING IMPACTS...



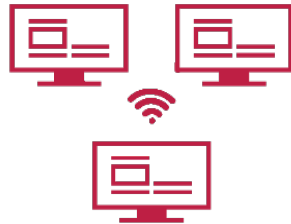
**CONTENT
CREATORS**



ADVERTISERS



AGENCIES



NETWORKS



RESEARCHERS

MIXING QUALITATIVE, QUANTITATIVE AND EYE-TRACKING RESEARCH



Ethnography

Watch and observe

Eye-tracking glasses

Eyesight to capture attention

In-depth interview

WE COLLECT...



Observed Attention:

How much attention they seemed to be paying to the TV screen (where their eyes were directed to as well as any reactions to the content)



Self-reported Engagement:

How “into” the content and how much attention they said to be paying to it



“Eyes on TV Screen (EOS)”:

How much of the time their eyes were actually on the TV set, from eye-tracking technology

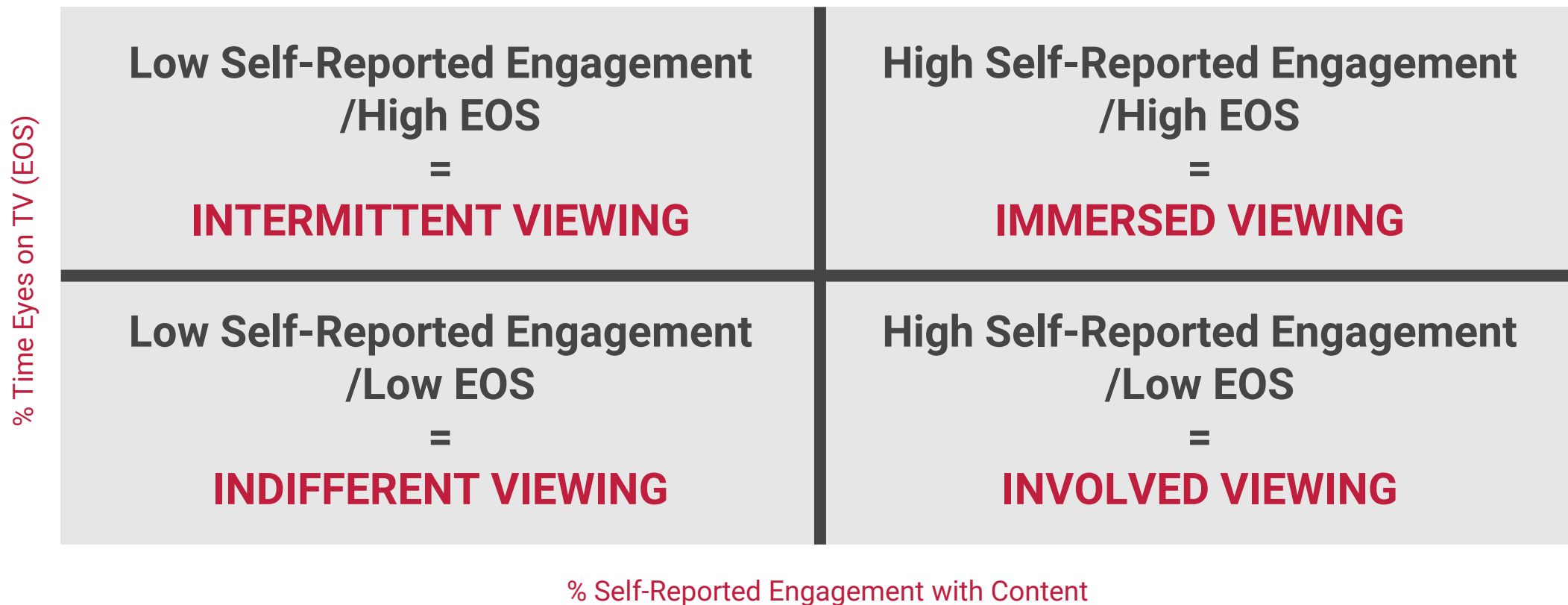


Recall:

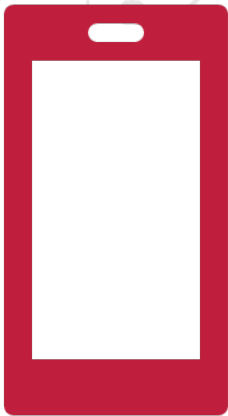
How much they remembered of the content and ads they were exposed to

ENGAGEMENT QUADRANTS

Viewing Spectrum

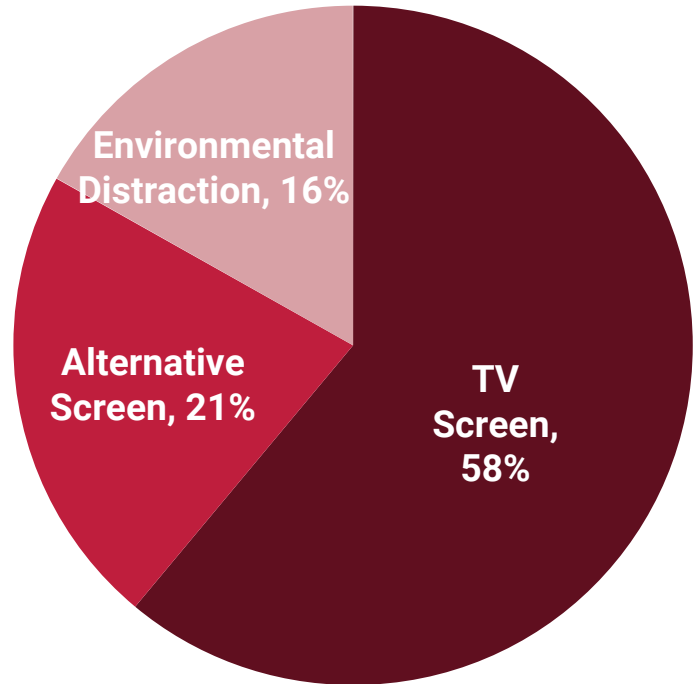



**Just because there's another
screen doesn't mean that it's the
dominant screen**



ENVIRONMENTAL DISTRACTIONS CAN BE EVEN WORSE THAN ANOTHER SCREEN

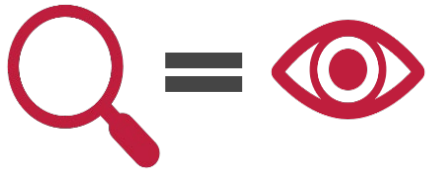
% of Time Eyes Were On...*
Among Total Participants (N=48)





Not all forms of
gathering
measurement
are **equal**

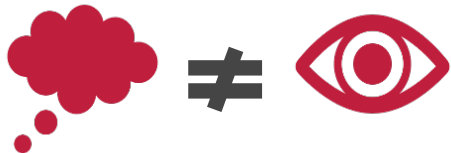
CORRELATIONS BETWEEN ENGAGEMENT, ATTENTION, AND EYE-TRACKING



Observed attention and eye-tracking often correlate.



Observed attention and self-reported engagement do not always correlate.



Self-reported engagement and “eyes on TV screen” do not always correlate.

NOT ALL VIEWING EXPERIENCES ARE EQUAL



GENRE



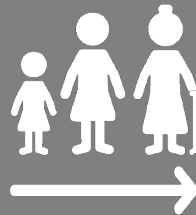
**APPEAL OF
CONTENT**



**FAMILIARITY
WITH CONTENT**



DEMOS



**LIFE STAGE/VIEWING
CIRCUMSTANCES**



**VIEWING
SEGMENT**

A background image showing a group of people, primarily young women, looking at a screen and smiling. They appear to be engaged with digital content. A diagonal line splits the image, with the top-left portion showing three women and the bottom-right portion showing a man and a woman. The text is overlaid on the center of the image.

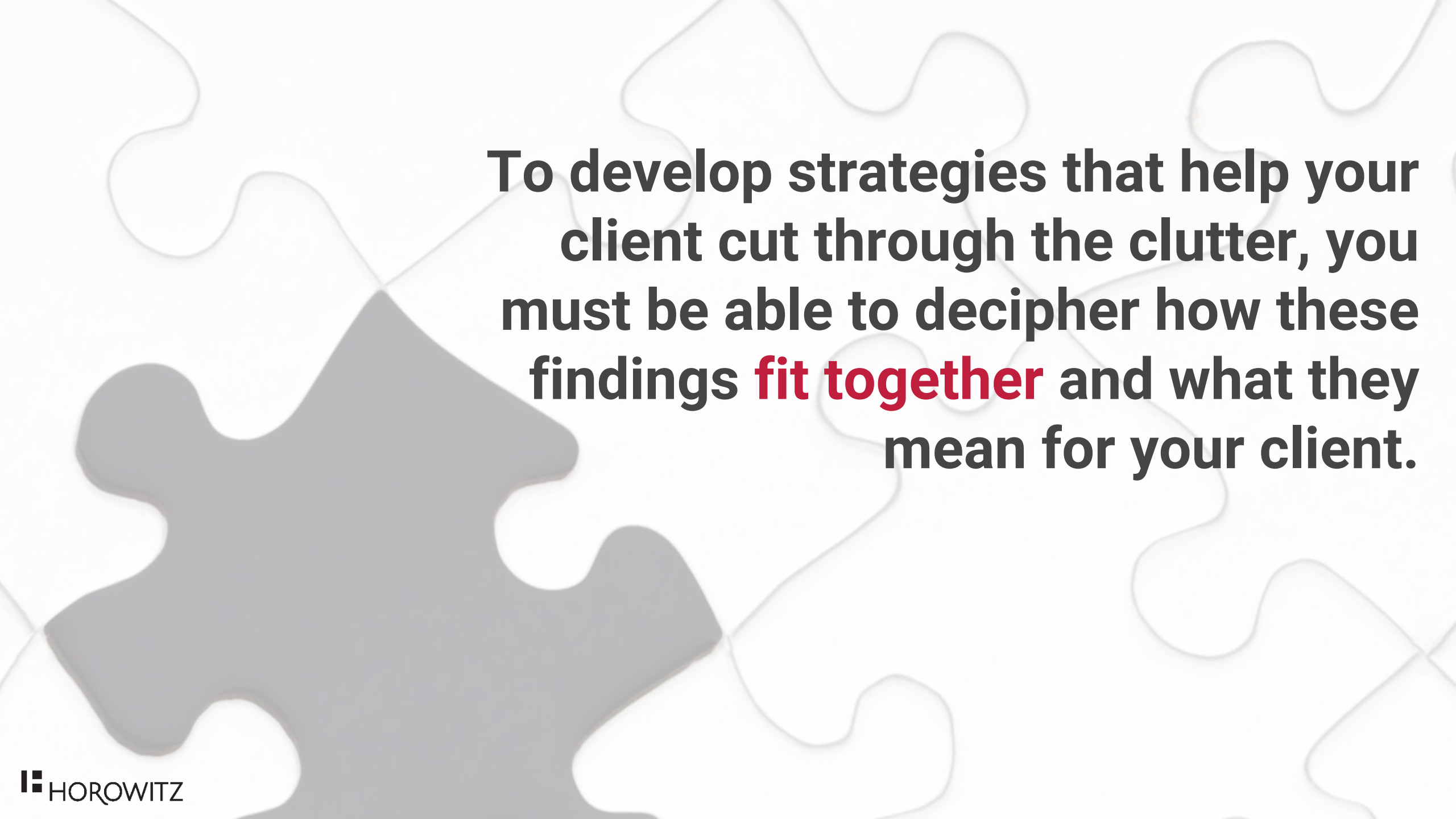
How people interact with content and how people
interact with ads is **NOT EQUAL**

A woman with dark, curly hair is shown in profile, smiling and looking up at a tablet she is holding with both hands. The background is a blurred indoor setting. Overlaid on the image is a text block in a bold, sans-serif font. The words "full story" are highlighted in red.

Neither observation, nor self-reported engagement, nor tracking “eyes on TV screen” tell the **full story** of attention in a multiscreen world.

In a multiscreen world, researchers must be able to implement **multiple methodologies** at once, and be skilled at interpreting the data.





To develop strategies that help your client cut through the clutter, you must be able to decipher how these findings **fit together and what they mean for your client.**

Thank you.



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