

Mobile (And Tablet) TV Multitasking

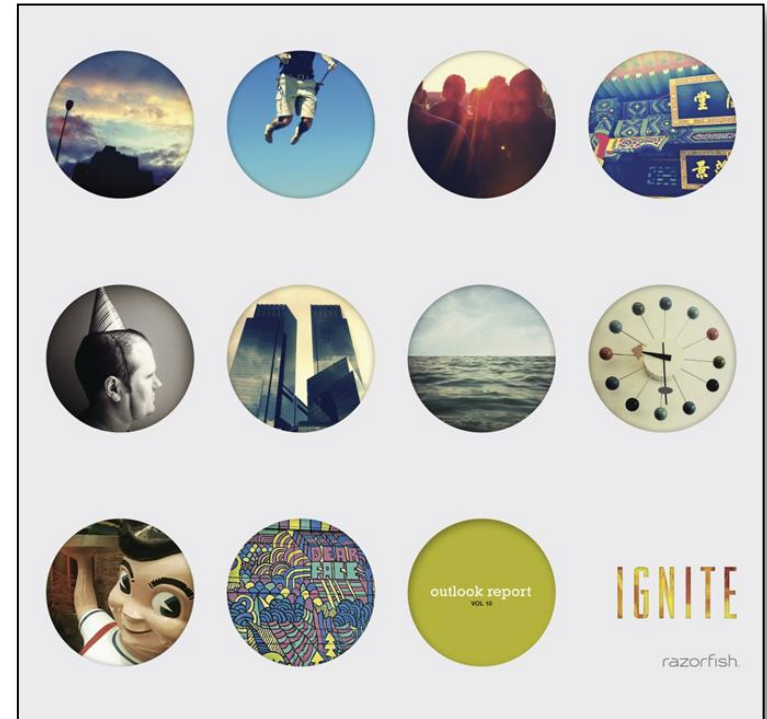


This study was conducted as part of the 2011 edition of the Razorfish Outlook Report. The full report can be accessed here:

razorfishoutlook.razorfish.com

To see our full POV including implications and recommendations for marketers, see this article:

<http://razorfishoutlook.razorfish.com/articles/forgetmobile.aspx>



Key players

Razorfish:

- Jeremy Lockhorn
VP, Emerging Media
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Yahoo!

- Ashmeed Ali
Senior Manager, Strategic Insights
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Introduction



Like most technologies, TV
is constantly *evolving*



People have been digital multitasking in front of the TV since the **first laptops...**



Today, devices like these are taking the **multitasking spotlight**, with ever-increasing capability and relatively small form factors



We've all known intuitively and have seen data pointing to this behavior. But few studies have gone deep enough to provide enough detail about what, **exactly**, people are doing on their mobile/tablet devices. Absent this knowledge, it's hard for marketers to know what to do about multitasking.

So we decided to **find out**.



METHODOLOGY | PHASE 1

WHO 3,000 mobile device owners

HOW 22-minute online survey with **Ipsos**

WHEN July 2011

METHODOLOGY | PHASE 2

Measured U.S. user activity on Yahoo! Mobile

Super Bowl

Sun, Feb 6 2010, 3-9 pm PST
Same time & day a week before and after

World Cup

July 11, 2010, 10:30-1:30 pm PST
Same time & day a week before and after

Academy Awards

March 7, 2010, 5-8pm PST
Same time & day a week before and after

* Mobile user activity measured with Yahoo! internal data. TV commercial data sourced from TNS.

Survey Highlights





First, a slight
diversion...





21%

of respondents admit to
texting while driving

59%

are more responsible;
they text in the car while
NOT driving

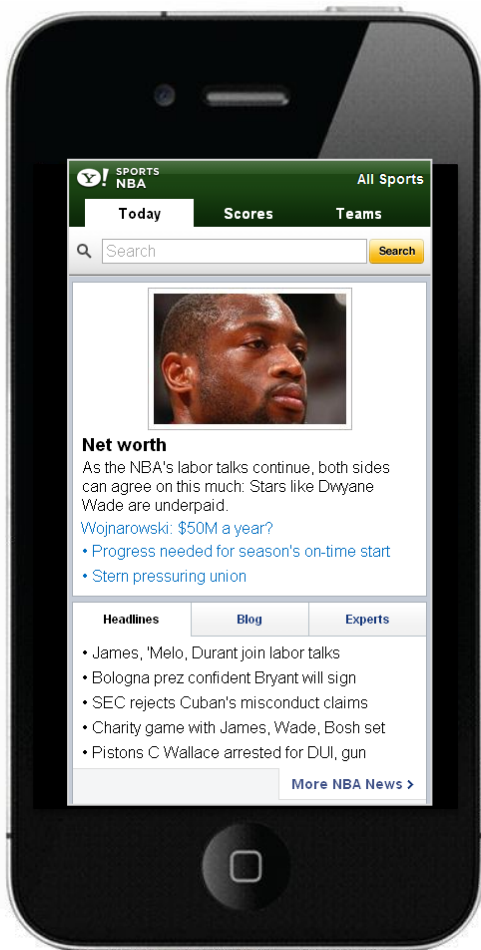




52%

**pretend to use their
mobile device
to avoid awkward
situations**





46%

of men check sports content at least a few times per week

24%

occasionally fight with significant others about checking sports content on their phones



8% report frequent fighting



Okay, seriously:
Mobile TV
multitasking
results

With 122M mobile Internet users....

80%  **98 million**

of respondents
are mobile
multitasking while
watching TV

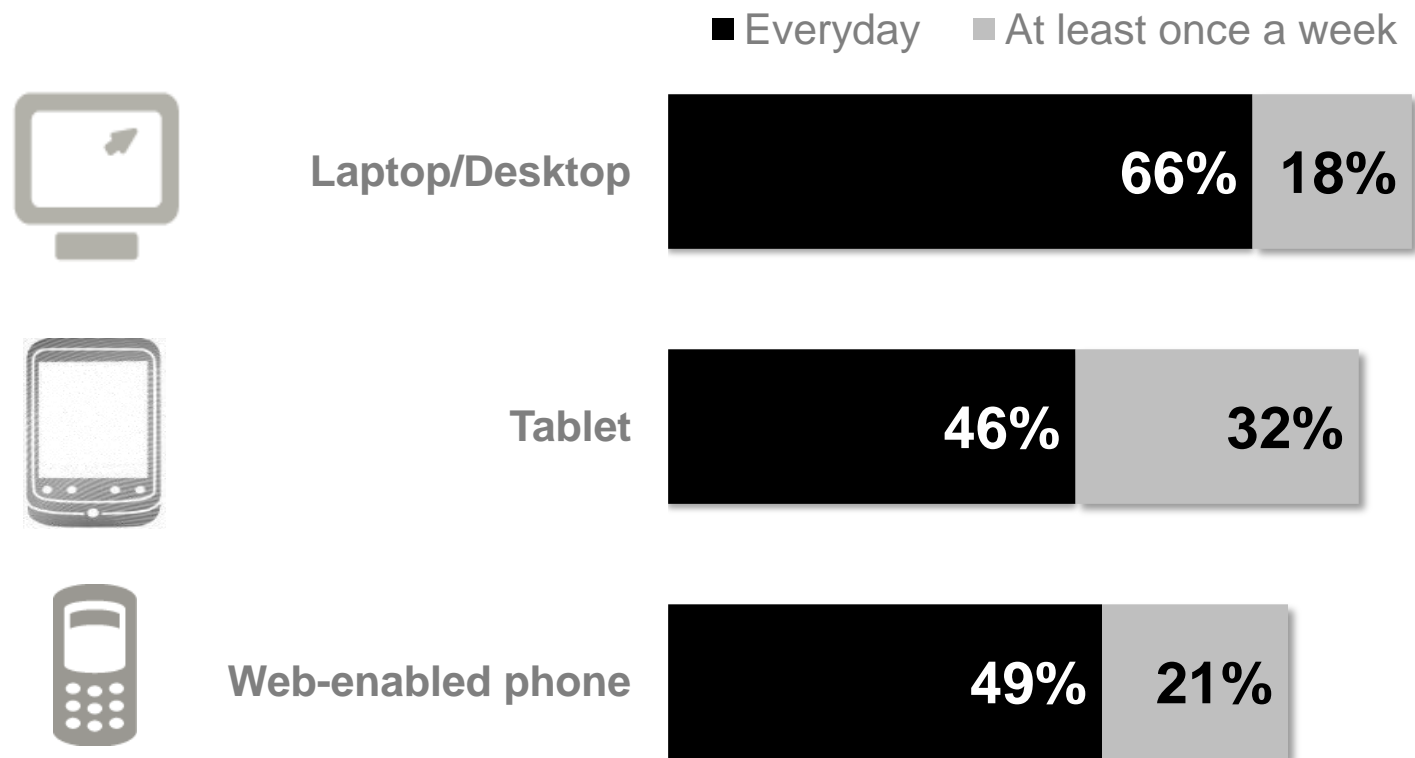
mobile TV multitaskers

SOURCE: Base used for projections based on ComScore MobileLens, June 2011(3 MO. AVG.), Total Mobile Internet Users 18-64 = Used browser or application or SMS (except mobile to mobile)



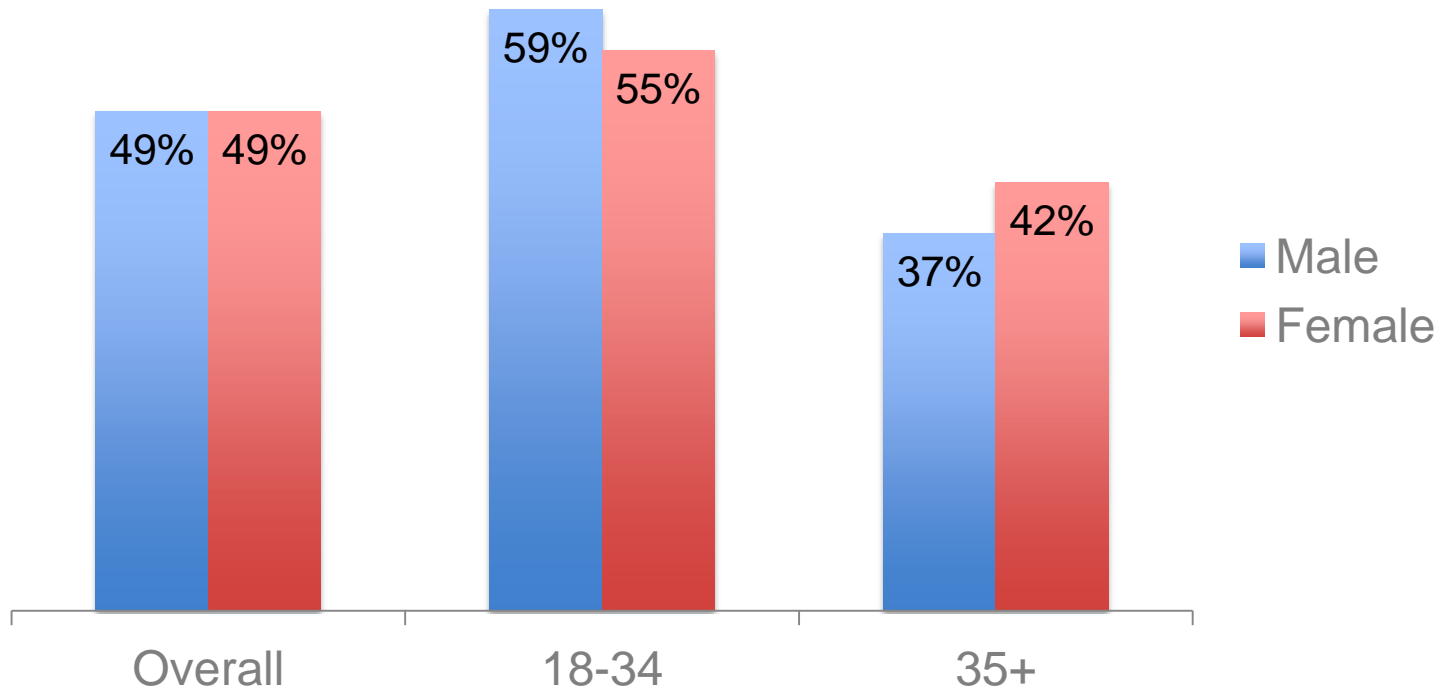
Multitasking happens much more frequently on laptops and mobile devices

I use the following to multitask when watching TV...



Multitasking is [slightly] more prevalent among younger and male audiences

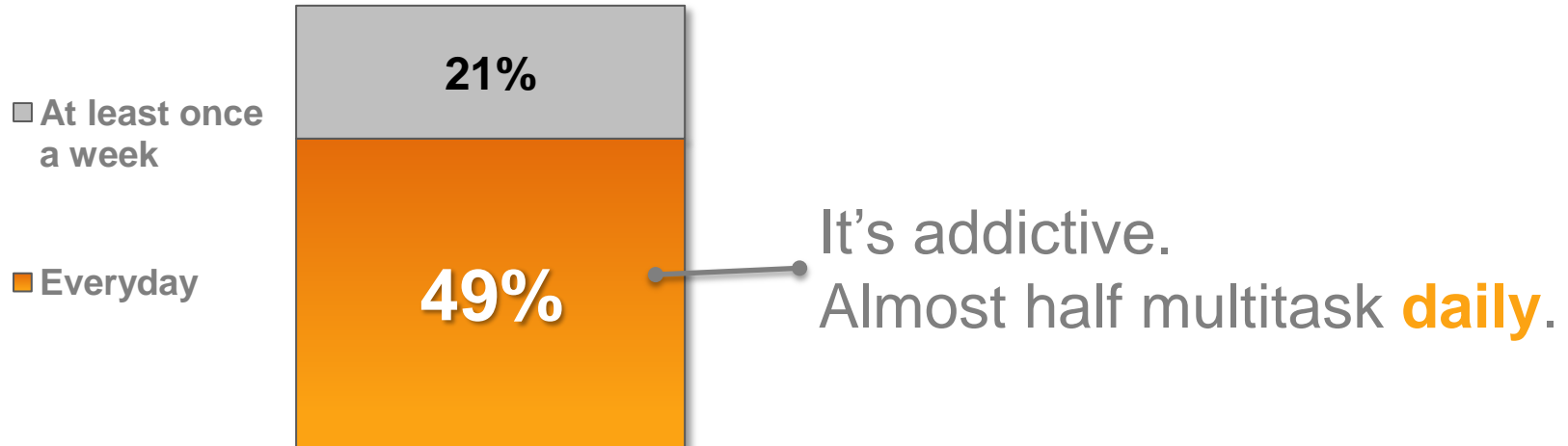
I use my mobile to multi-task when watching TV



Q: How often do you use any of the following devices while watching TV at home? Base: Own Device (Floating Bases)

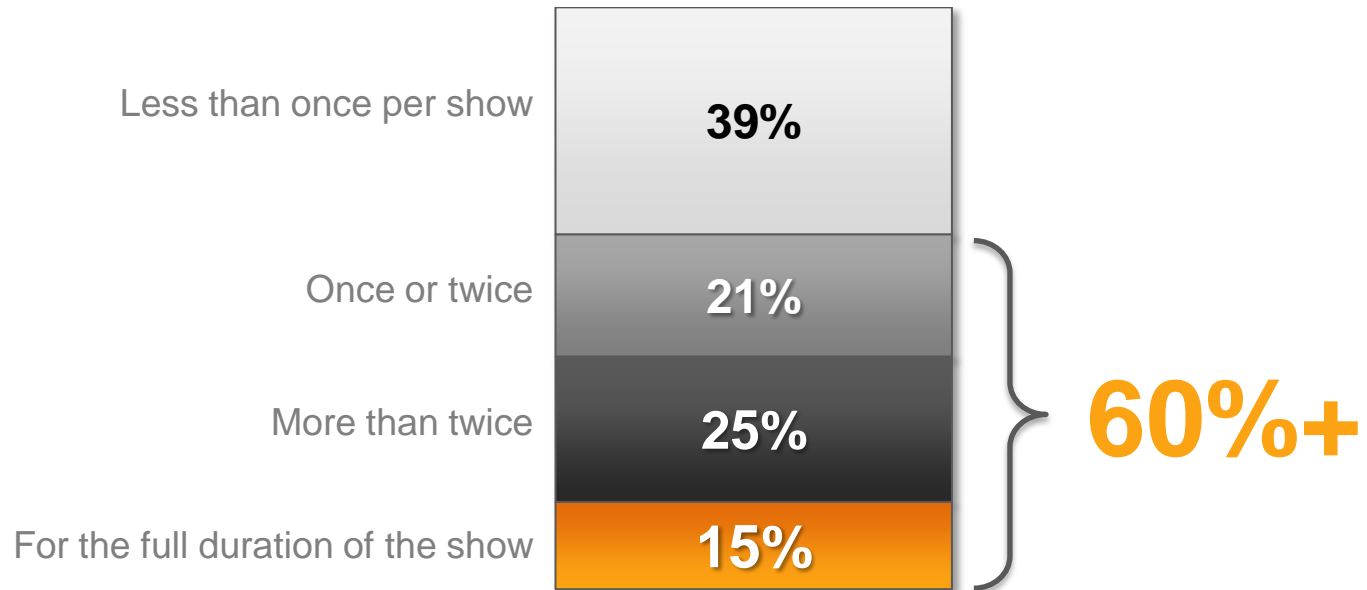
Half mobile multitask while watching TV daily

I mobile multi-task while watching TV (Frequency)



With a majority checking their mobile devices at least once per show

I mobile multi-task while watching TV (Program Duration)



It's both an enhancement and a distraction

38%

Each Agreed/strongly agreed
with these statements:

- Using the Internet on my mobile or tablet device while watching TV enhances my viewing experience
- I find using mobile devices while watching TV to be distracting



What do they do?

I do the following...

2C's

94%

Are engaged with
some kind of
communication

60%

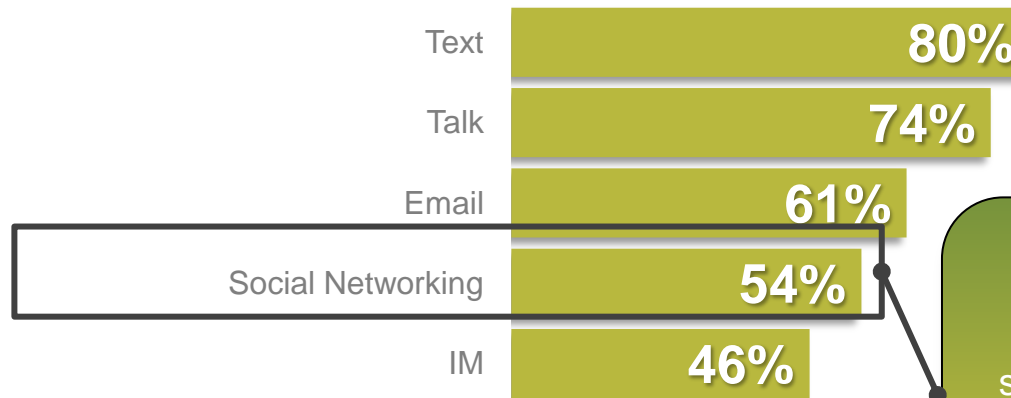
Are engaged with
some kind of
content



Connection & content are main drivers

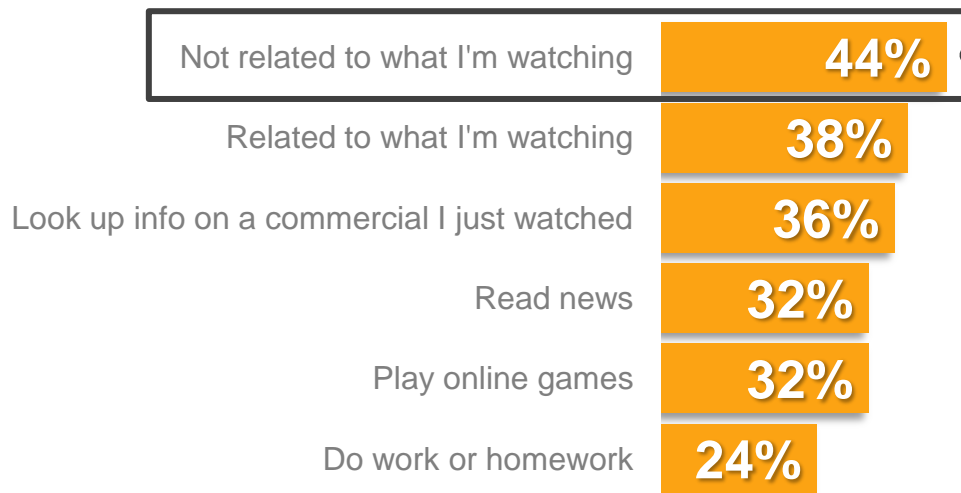
What were you doing when mobile multi-tasking while watching TV?

CONNECT
94%



Despite the general dominance of social networks, more direct forms of communication are favored

CONTENT
60%



There's a shocking amount of random web surfing happening.

Depending on device, multitaskers engage differently

I use the following device to...

Engage in some kind of
COMMUNICATION

Engage with some kind of
CONTENT



91%

89%



94%

60%



73%

78%

Reality and news are tops when it comes to multitasking

Top genres that trigger multitasking behavior, in rank order

Reality
News
Comedy
Sports
Food

These top 5 categories
stand to benefit most from
augmented second-screen
experiences



There are some not entirely surprising gender differences

Top genres that trigger multitasking behavior, in rank order

True to stereotype, sports jumps to the second slot for guys; doesn't appear in top five for ladies

Total	Male	Female
Reality	News	Reality
News	Sports	News
Comedy	Reality	Comedy
Sports	Comedy	Food
Food	Food	Drama

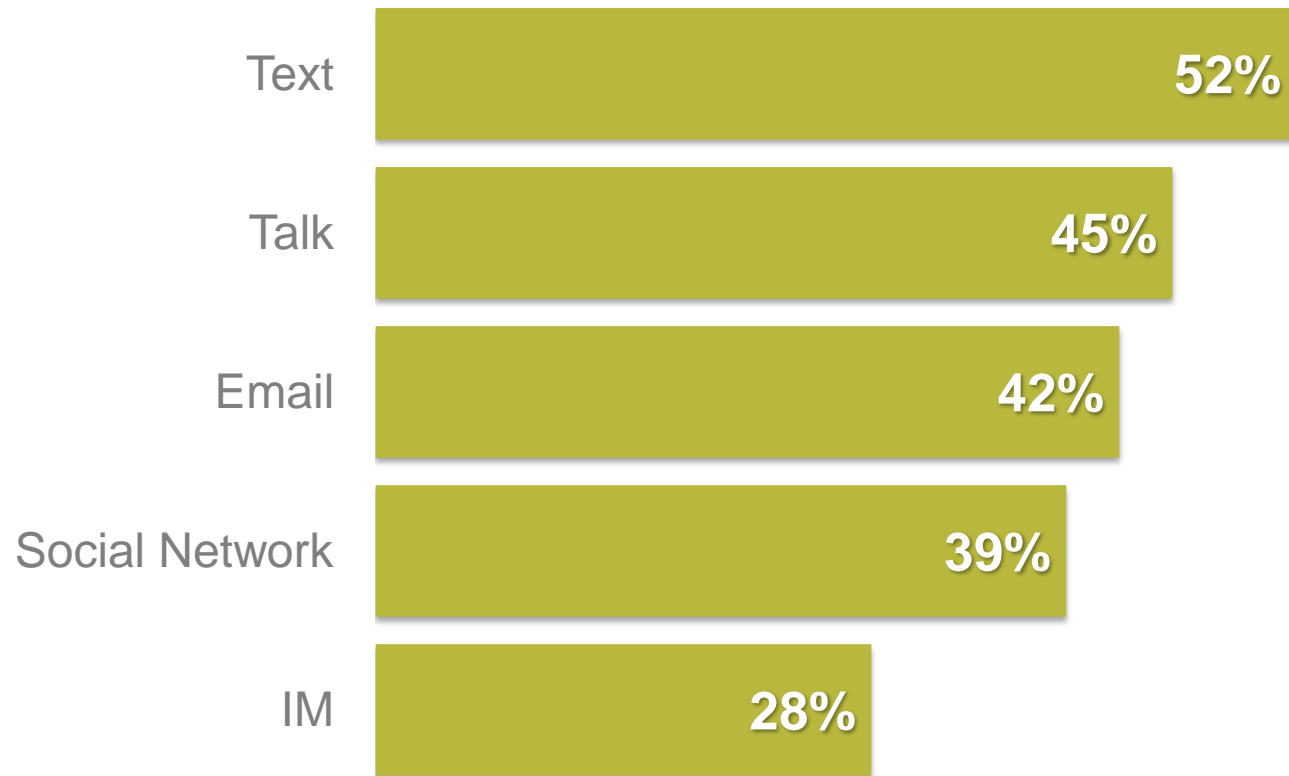


Multitasking during commercials



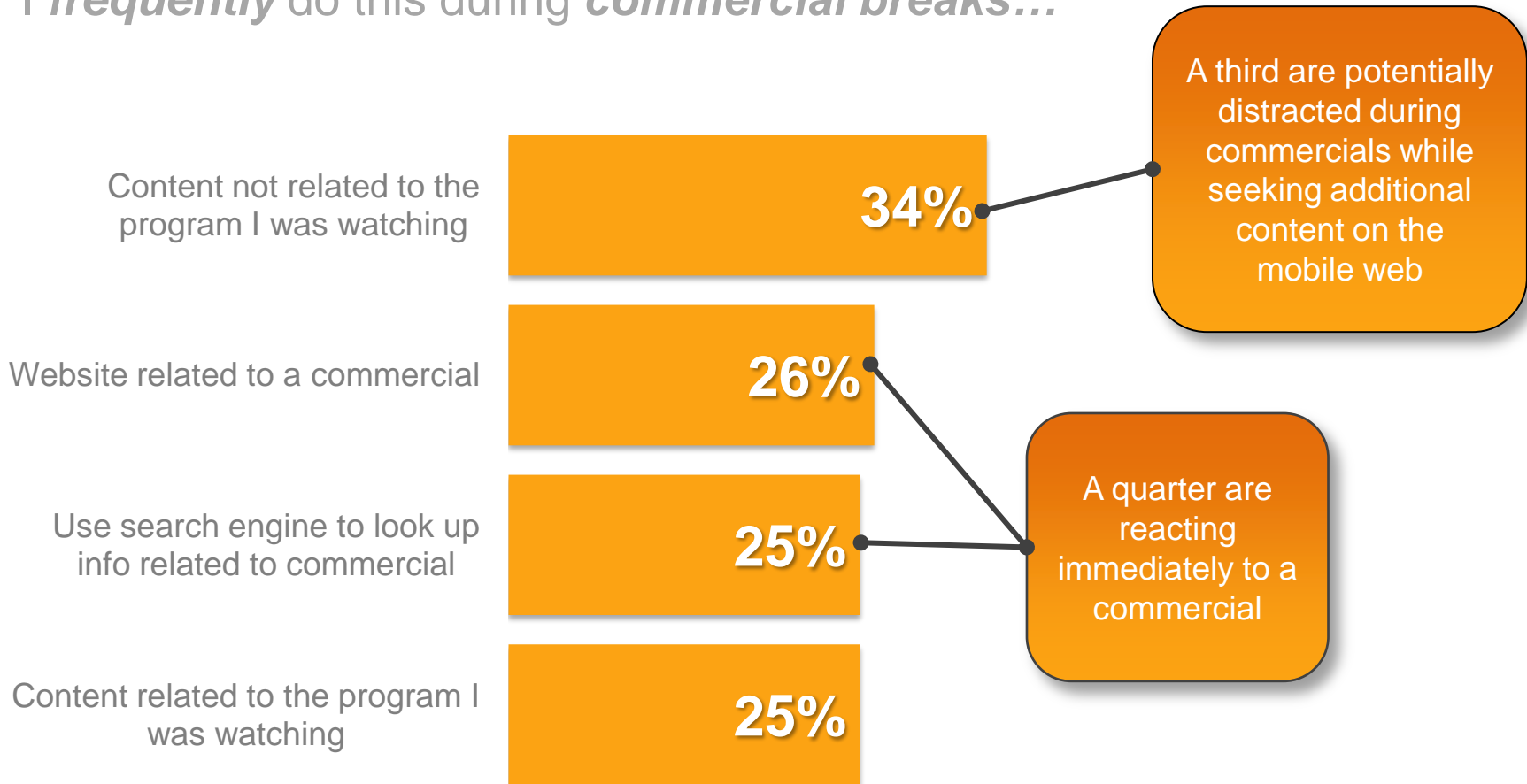
Communication with others is a frequent activity

I frequently do this during commercial breaks...



1/4 connect with content around the TV program and ads frequently during breaks

I *frequently* do this during *commercial breaks*...



DVR usage impacts multitasking slightly

I *multi-task* on mobile web during...

During a live TV show

59%

During a recorded TV show

55%

Commercials during live TV

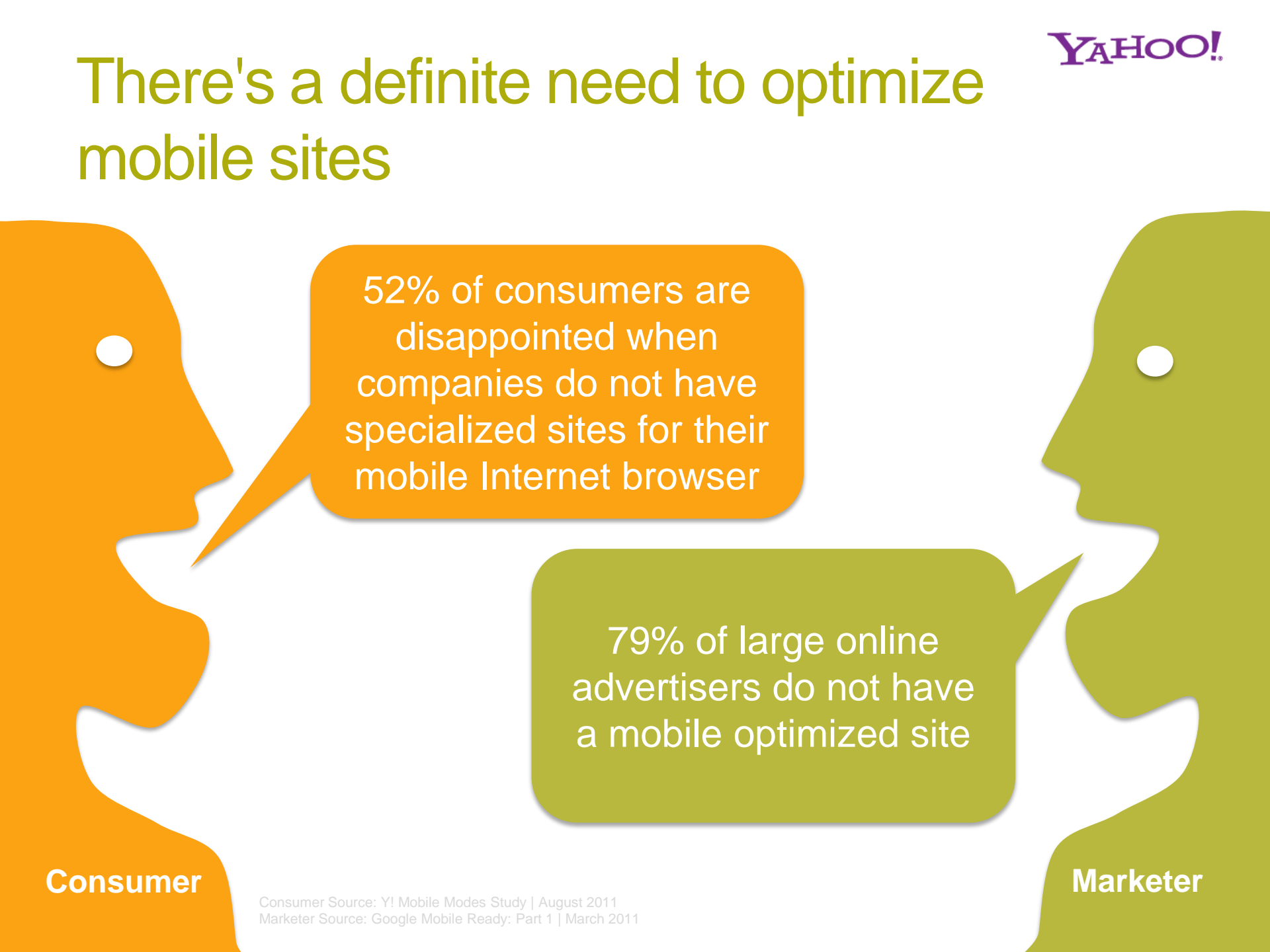
61%

Commercials during recorded TV

52%



There's a definite need to optimize mobile sites

An infographic featuring two stylized human profiles facing each other. The profile on the left is orange and labeled 'Consumer'. The profile on the right is green and labeled 'Marketer'. Two speech bubbles are positioned between them. The orange bubble, pointing towards the consumer, contains the text '52% of consumers are disappointed when companies do not have specialized sites for their mobile Internet browser'. The green bubble, pointing towards the marketer, contains the text '79% of large online advertisers do not have a mobile optimized site'.

52% of consumers are disappointed when companies do not have specialized sites for their mobile Internet browser

79% of large online advertisers do not have a mobile optimized site

Consumer

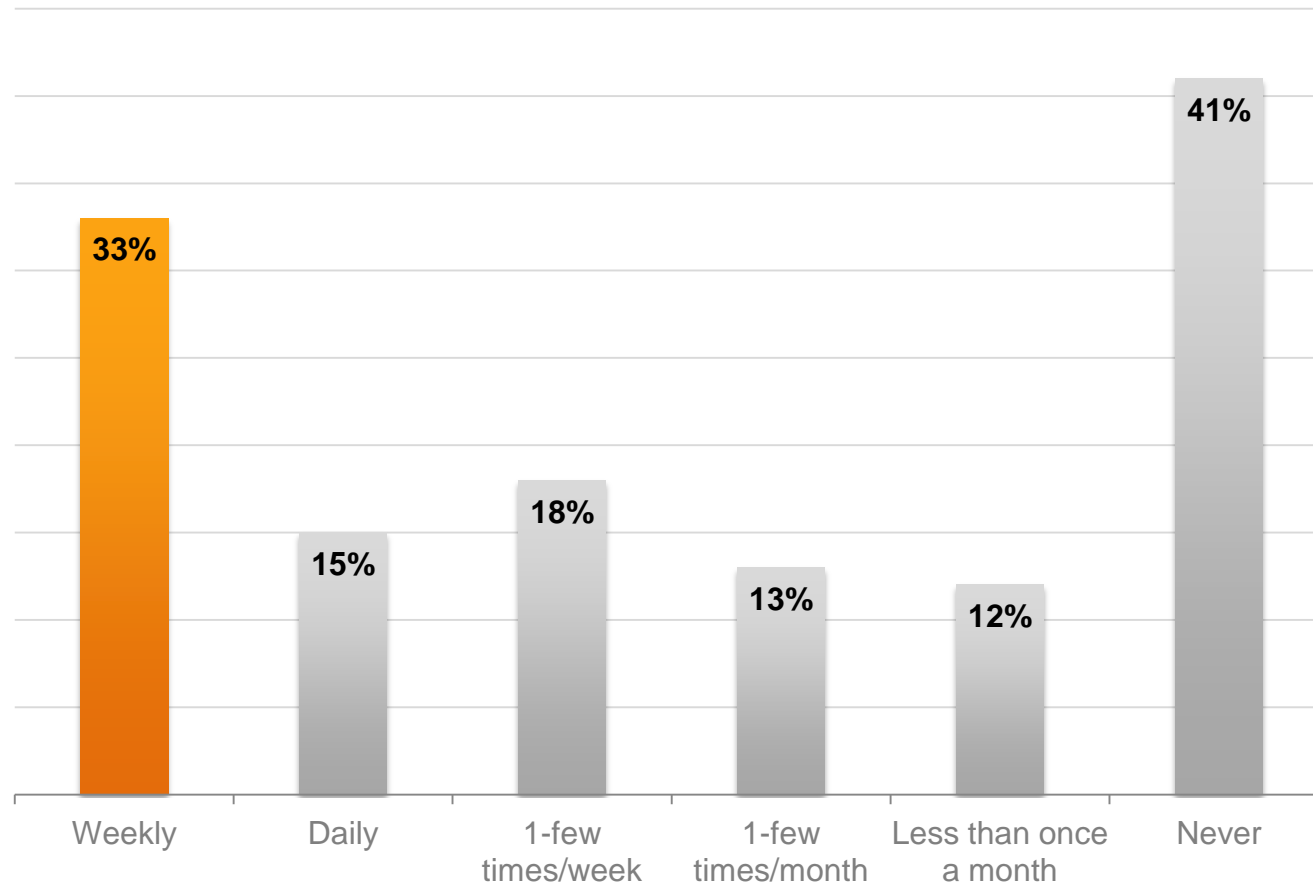
Marketer

Sports & Mobile Multitasking



A 1/3 use their mobile to check sports content several times a week

How often do you read sports content on your mobile device?



With 122M mobile Internet users....

60%



73 million

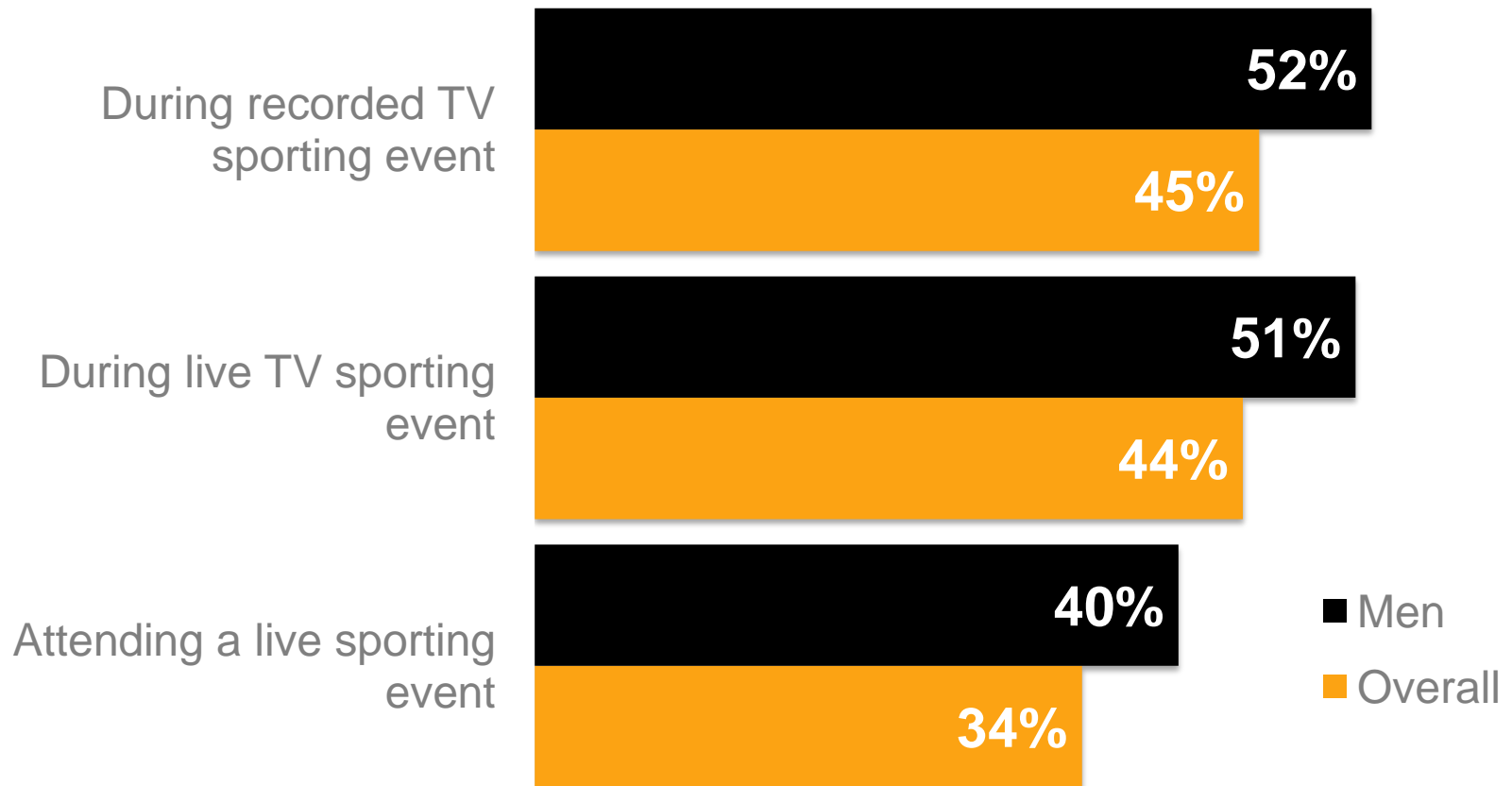
of respondents
mobile multitask
while watching
sports

mobile TV multitaskers

SOURCE: Base used for projections based on ComScore MobileLens, June 2011(3 MO. AVG.), Total Mobile Internet Users 18-64 = Used browser or application or SMS (except mobile to mobile)

Almost half multitask during sports events; guys more likely

I multitask on the mobile web during sporting events...



Reminder: what do they do, overall?

2 C's, in rank order:

1. Content

2. Communication



More of these multitaskers are engaging with some sort of content

I do the following...

2C's

60%

Are engaged with
some kind of
communication

69%

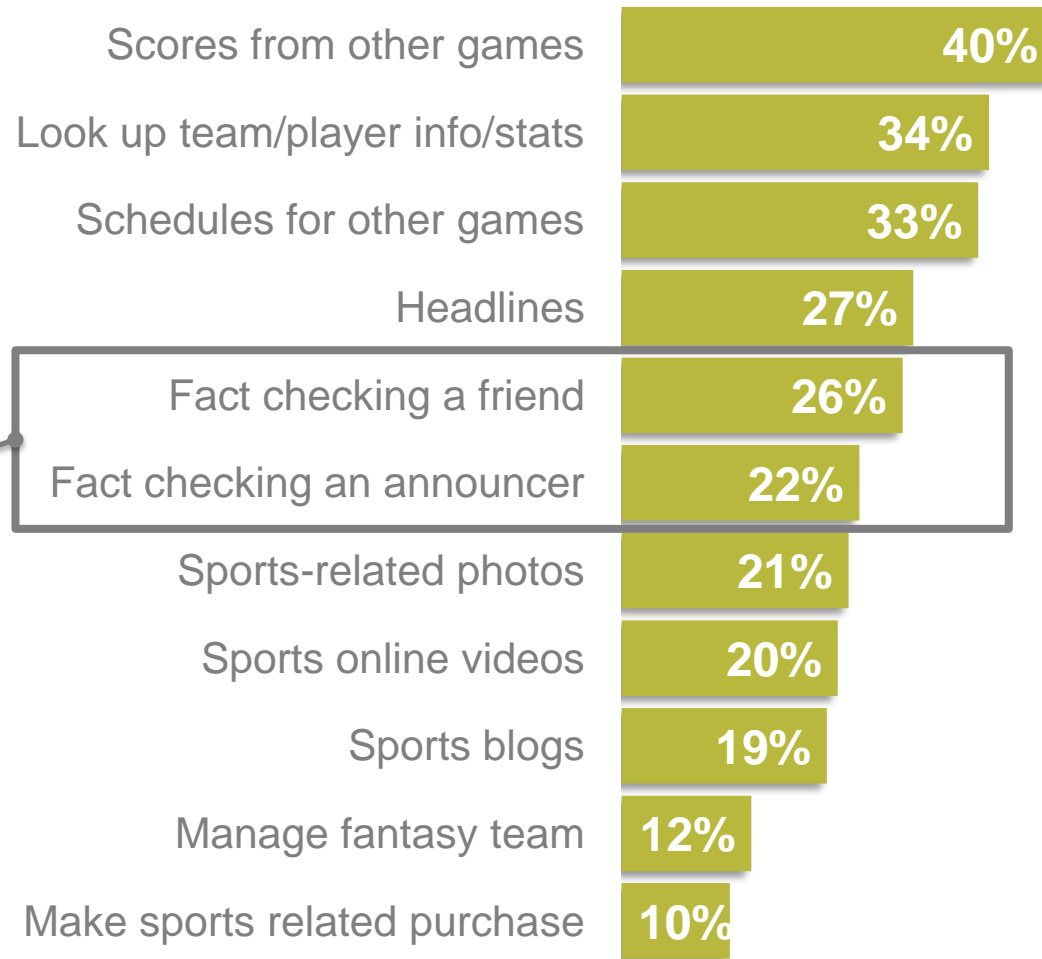
Are engaged with
some kind of
content



For sports, content dominates

I do the following...

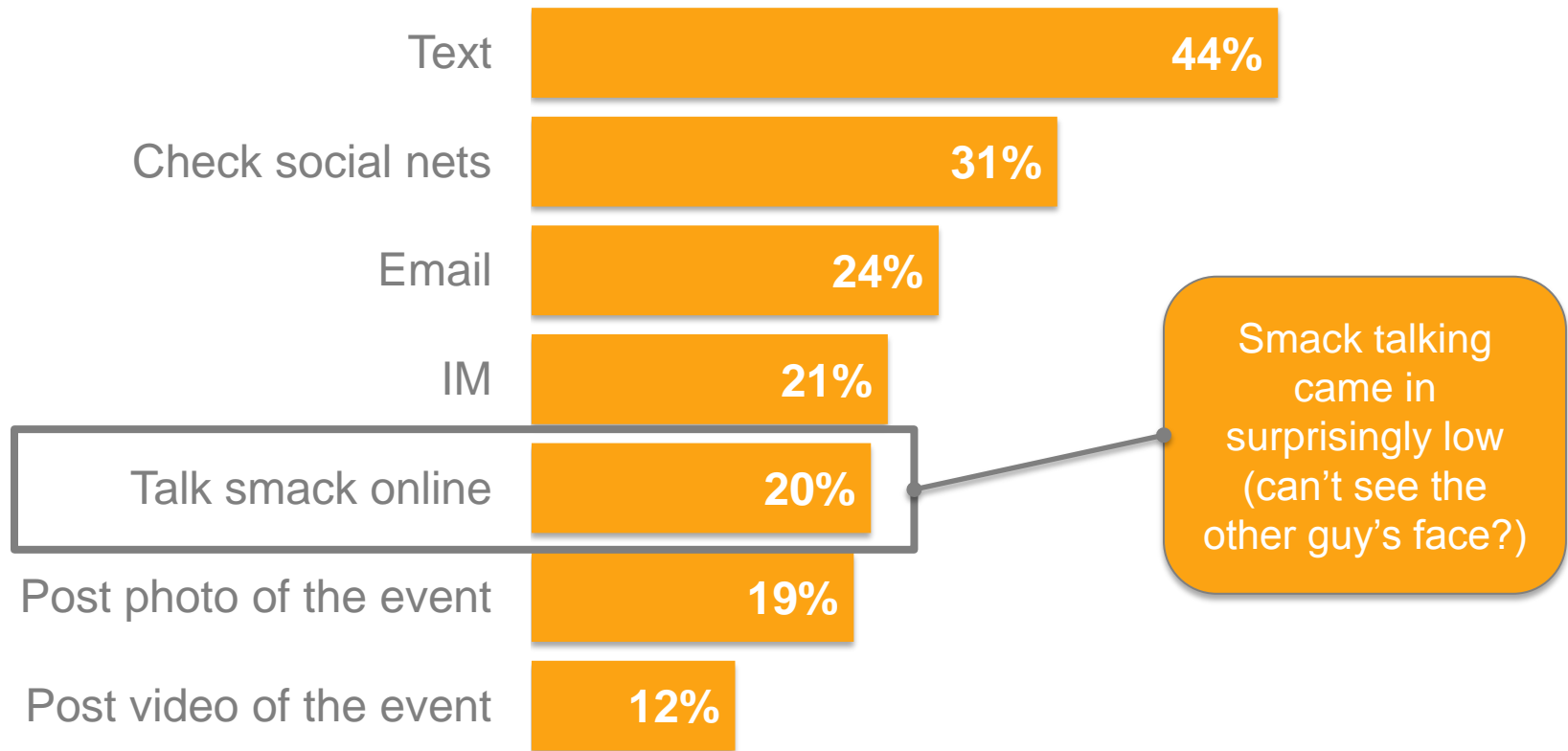
CONTENT
69%

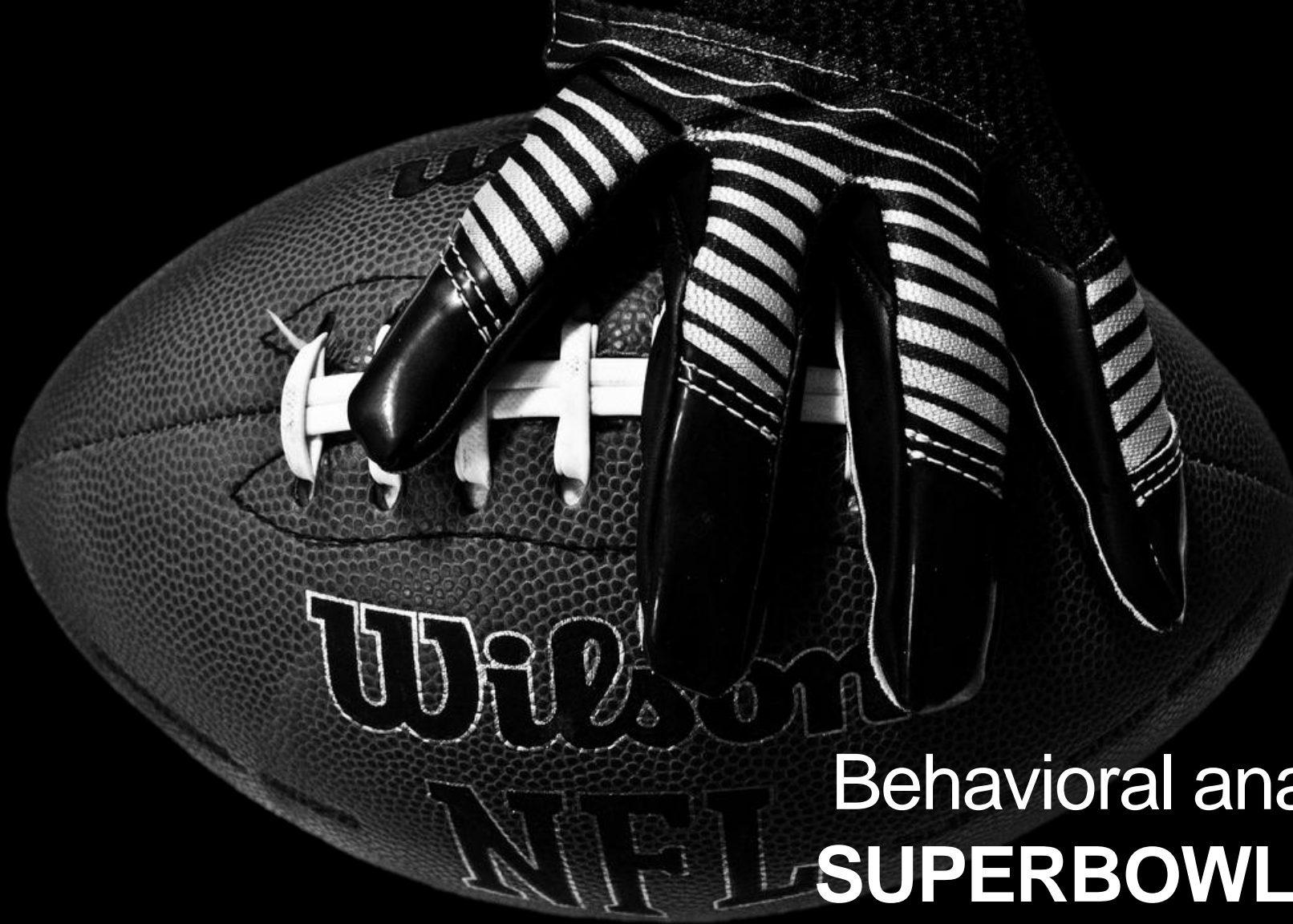


We love to bust somebody by proving them wrong, don't we?

Connection comes in many forms, including smack

I do the following...

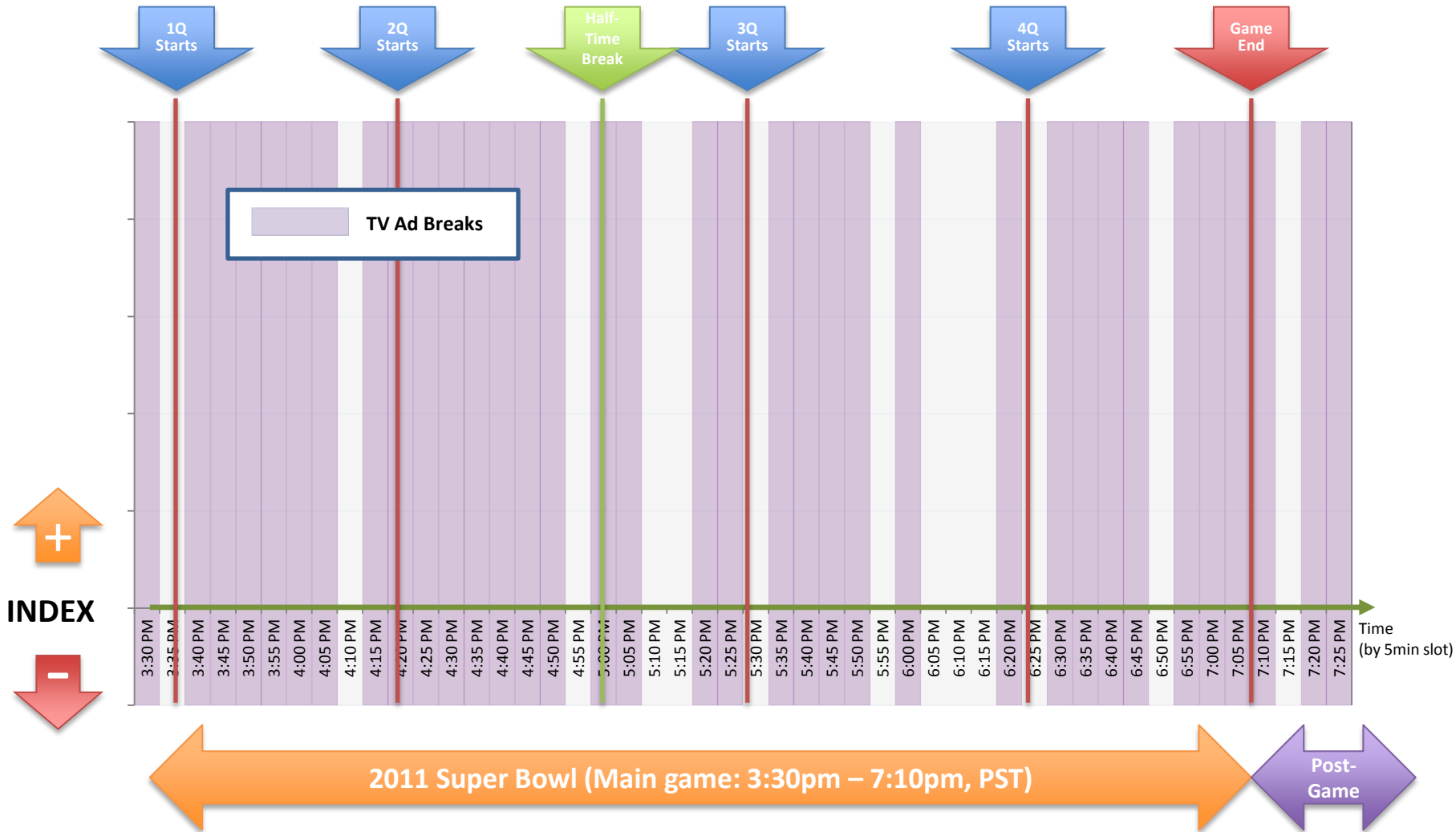




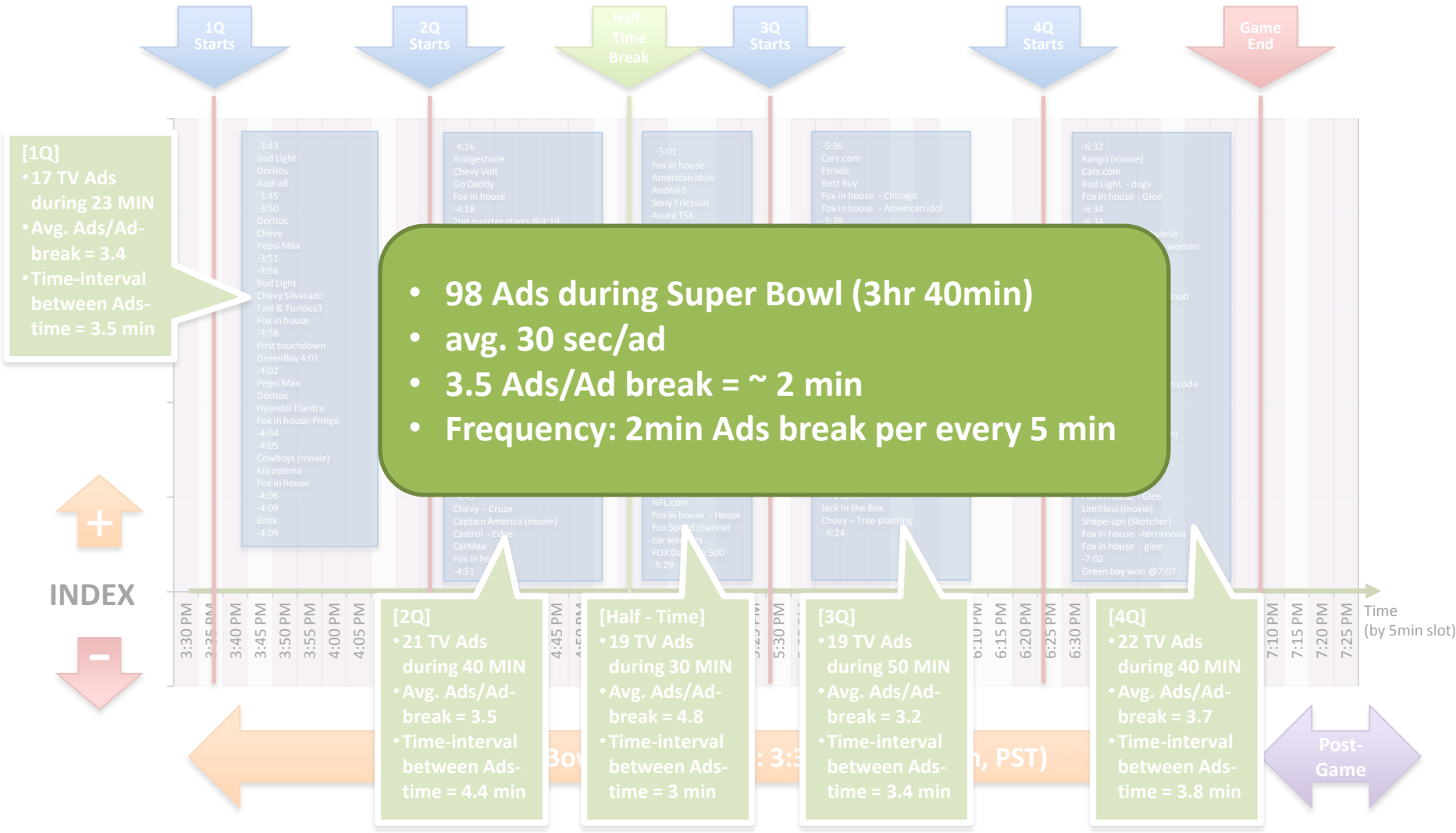
Behavioral analysis **SUPERBOWL 2011**



A look at the entire game

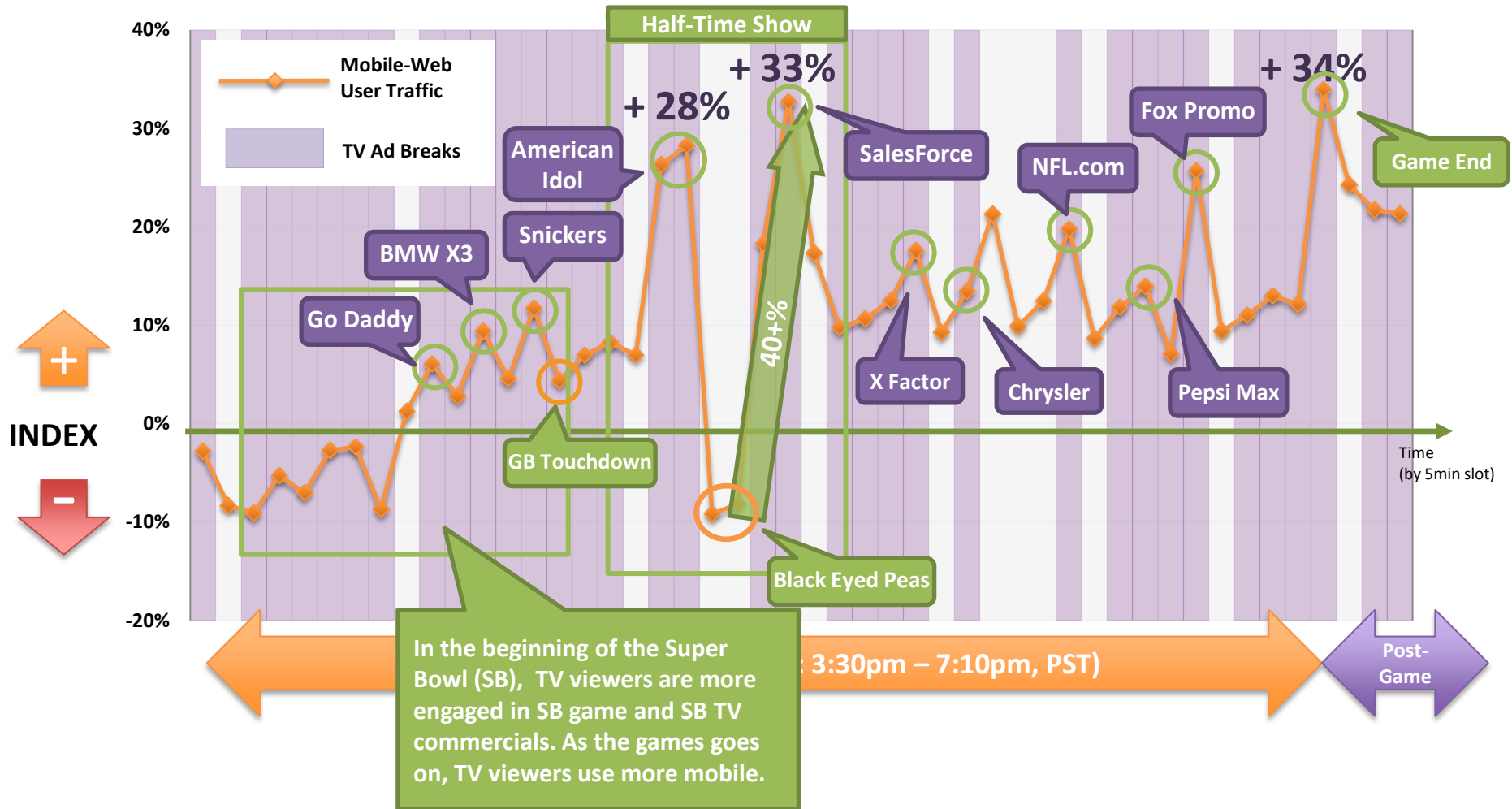


98 commercials played



Y! Mobile FP traffic saw spikes

Mobile-Web Front Page User Traffic

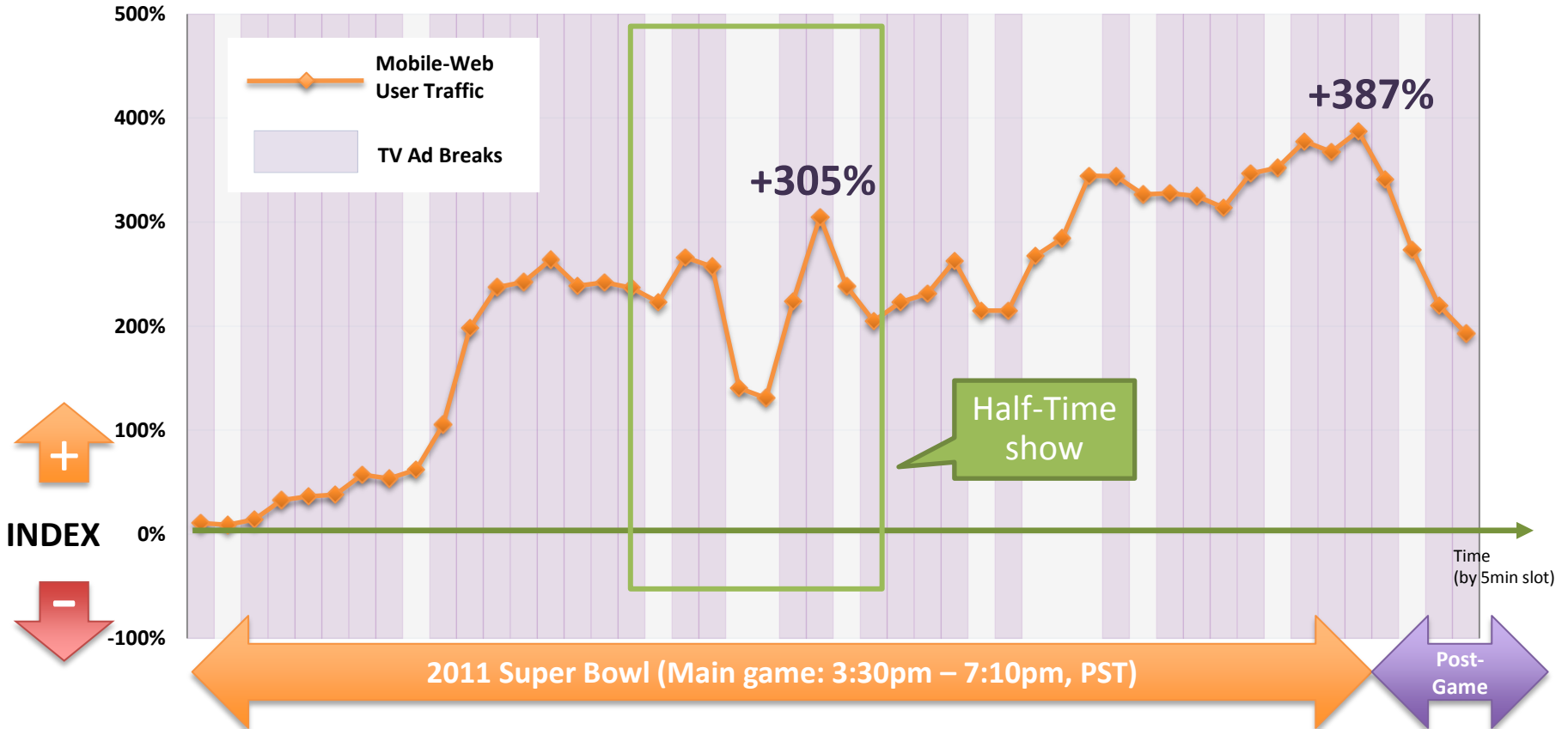


IGNITE

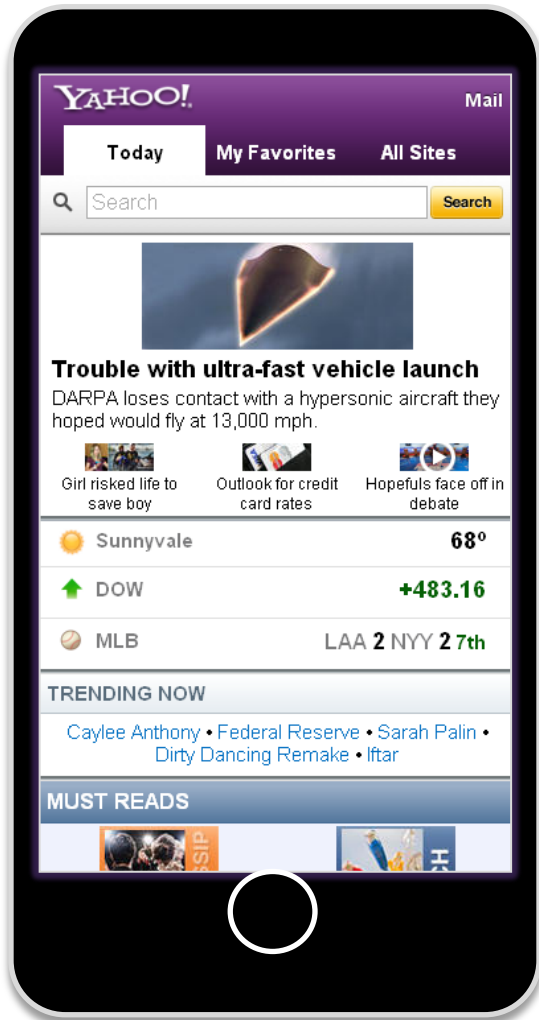
2011 Super Bowl: Sunday Feb 06, 2011, between 3:30-7:30 hrs PST
 Control dates: Same time & day a week before (1/30) and a week after (2/13)
 Measurement: User activity on m.yahoo.com (for US users), using Y! Internal Data
 TV Commercial data sourced from TNS

Y! Mobile sports also saw spikes

Mobile-Web Sports User Traffic



Mobile Search Queries Explode



“**Super Bowl**”^{*} is the most frequent search query

- More than 400 different search query terms related to ‘Super Bowl’ are observed in top 10,000 query terms in US on Super Bowl day (Feb 6, 2011)
- % change of “Super Bowl” query term, compared to previous two weeks average, is 980%

Search queries related to TV commercials during Super Bowl have significantly increased

- Go Daddy: 6900%
- Chevy Camaro: 1700%
- Super Bowl: 980%
- Super 8 (Movie): 1970%
- Transformer (movie): 610%
- Volkswagen: 300%
- Green Bay: 180%
- THOR (movie): 81%

Note:

- 1) Super Bowl query term*: Super Bowl, Superbowl, or query terms including Super Bowl or Superbowl
- 2) The most frequent query terms: excluding usual navigational query terms such as yahoo, facebook, google, etc
- 3) Top 10,000 query terms on Super Bowl day (Feb 6, 2011) in US



Behavioral analysis ACADEMY AWARDS 2010



... with strong increases to Y! News & FP especially during the "after party"

12%

Average increase in traffic and engagement on Yahoo! Mobile overall during commercials

39%

Increase in content consumption on Yahoo! Mobile Front Page

125%

Higher browsing activity on Yahoo! Mobile News

13%

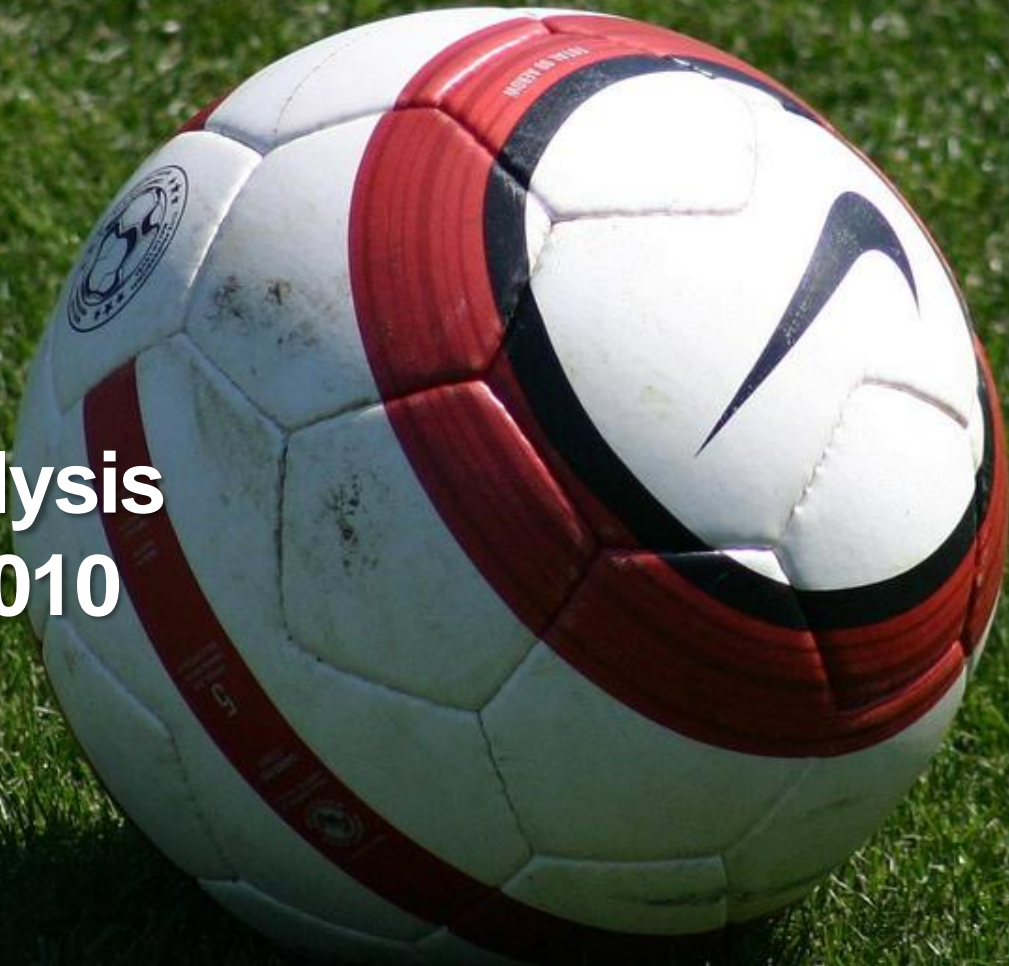
Increase in searches on Yahoo! Mobile Search

6%

Increase in checking and sending emails on Yahoo! Mail

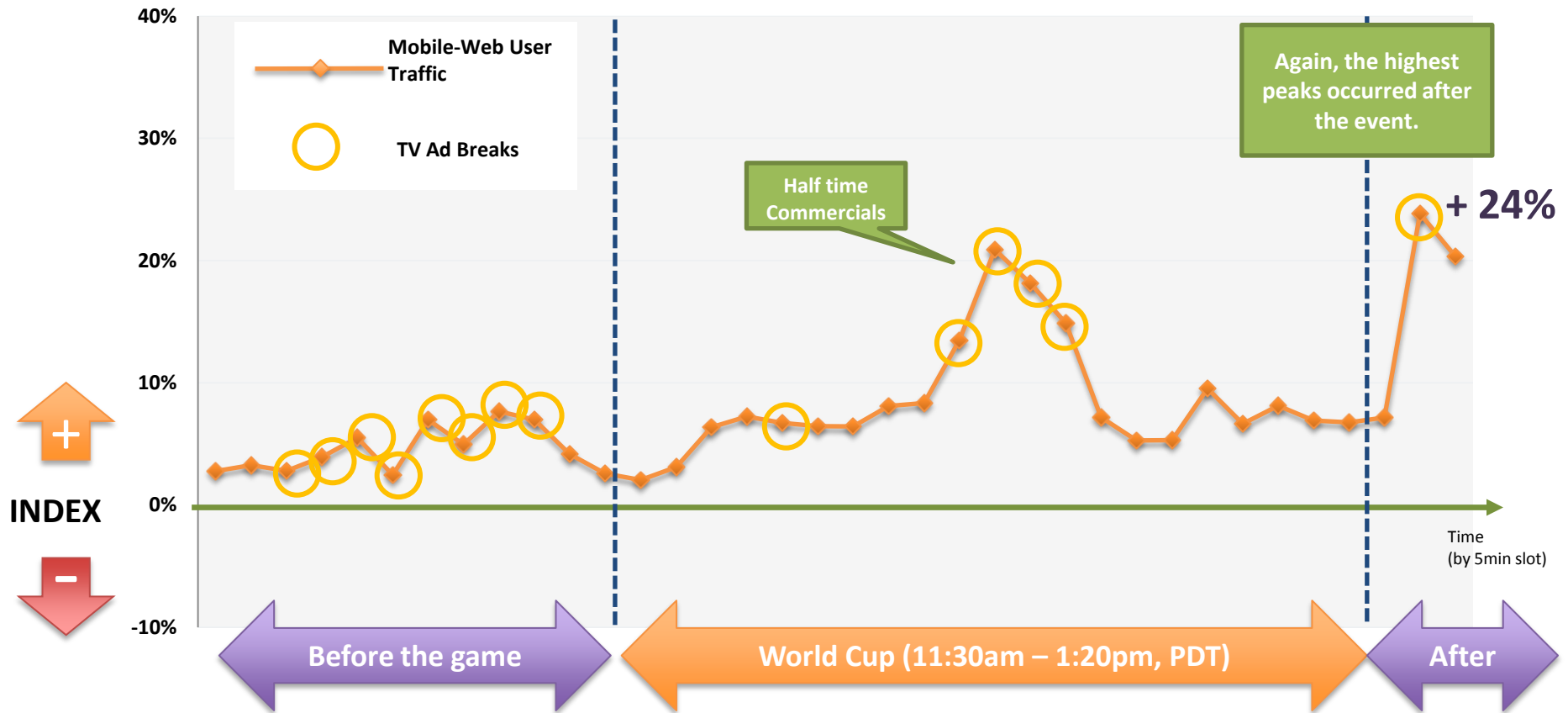


Behavioral analysis WORLD CUP 2010



Mobile traffic to Y! shows greatest spike during half time & post game ad slots...

Yahoo! Mobile Front Page User Traffic



...with strong increases on Y! News properties on the mobile device

10%

Average increase in traffic and engagement on Yahoo! Mobile overall

24%

Increase in content consumption on Yahoo! Mobile Front Page

57%

Higher browsing activity on Yahoo! Mobile News

12%

Increase in searches on Yahoo! Mobile Search



Mobile Multitasking Compared to Other Devices



Tablet users currently show higher levels of multitasking

I multitask when I watch...?

	LAPTOP OR DESKTOP PC	WEB-ENABLED MOBILE PHONE	TABLET PC
Reality - Competitions	34%	35%	42%
Reality - Makeovers	27%	27%	32%
News	50%	49%	56%
Sports	41%	42%	47%
Food	40%	41%	49%
Do-it-yourself/How-to	29%	29%	34%
Award shows	29%	30%	37%
Action-adventure	28%	28%	34%
Science fiction	25%	24%	32%
Adult animation	20%	20%	26%

Q: You mentioned that you multitask by using mobile and tech devices while watching TV. Based on your experience, during which types of shows are you likely to multitask using tech/mobile devices? Base: multitask With Mobile/Tech While Watching TV



Phone & PCs are more about communication

What were you doing when multitasking?

	LAPTOP OR DESKTOP PC	WEB-ENABLED MOBILE PHONE	TABLET PC
Email	82%	61%	60%
Social Networking	72%	54%	50%
IM	52%	46%	37%
Not related to what I'm watching	77%	44%	53%
Related to what I'm watching	65%	38%	57%
Look up info on a commercial	64%	36%	55%
Read news	60%	32%	50%

Q: You mentioned that you use the following devices while watching TV at home. Which of the following, if any, do you do on these devices while watching TV at home? Please select all that apply for each device. Base: Use Device While Watching TV Once a Month +

Laptop/phone is the most important device but Tablet PC rises in prominence

Which device is most important? (1st, 2nd, or 3rd)

Top 4 Devices Shown

Total Population

Tablet PC Owners

	1ST, 2ND, OR 3RD
Web-Enabled Mobile Phone	75%
Laptop computer	63%
Desktop computer	46%
Gaming console	27%

	1ST, 2ND, OR 3RD
Web-Enabled Mobile Phone	61%
Laptop computer	60%
Tablet PC	46%
Desktop computer	40%



Conclusions

- **TV multitasking is big.** 80% mobile multitask while watching TV.
- **Commercial time = mobile primetime.** Y! mobile web traffic during live TV events is strongly correlated to ad breaks.
- **I need to know more!** 25% frequently look up info on a TV ad during the commercial break.



Implications

- **Think tie-in.** Integrate mobile ads into your TV media buys to engage users on both screens.
- **Cater to the info-seekers.** Make sure additional info from your TV ad is easily accessible on your mobile site.
- **Be in the content.** During major live events, advertise on sites relevant to the sponsored program to reinforce your message.

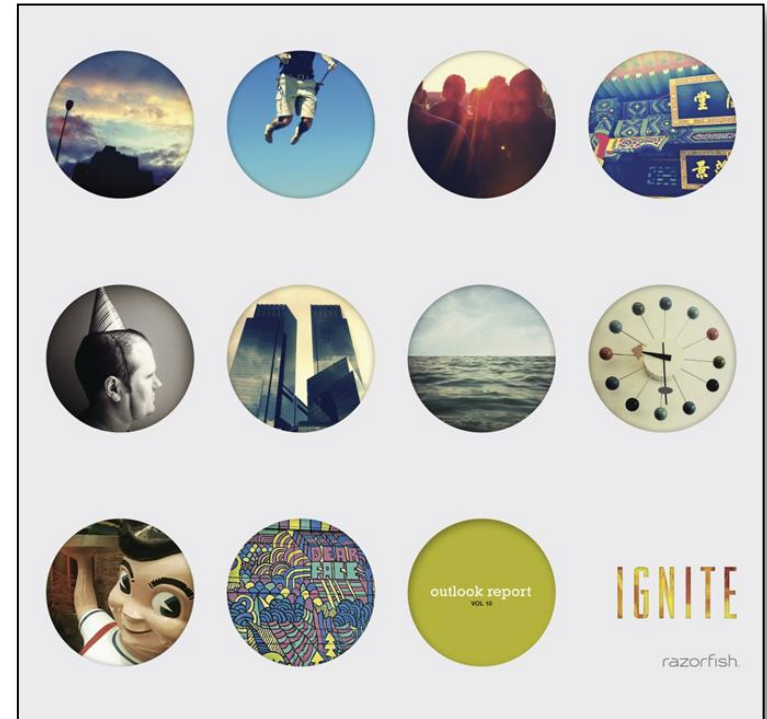


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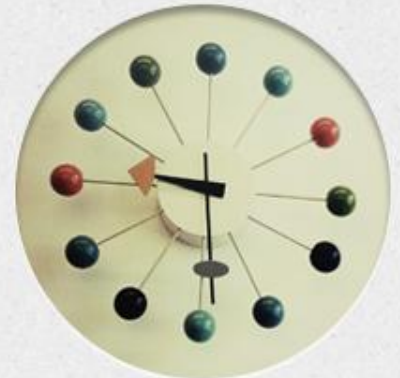
- Jeremy Lockhorn
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THANK YOU!



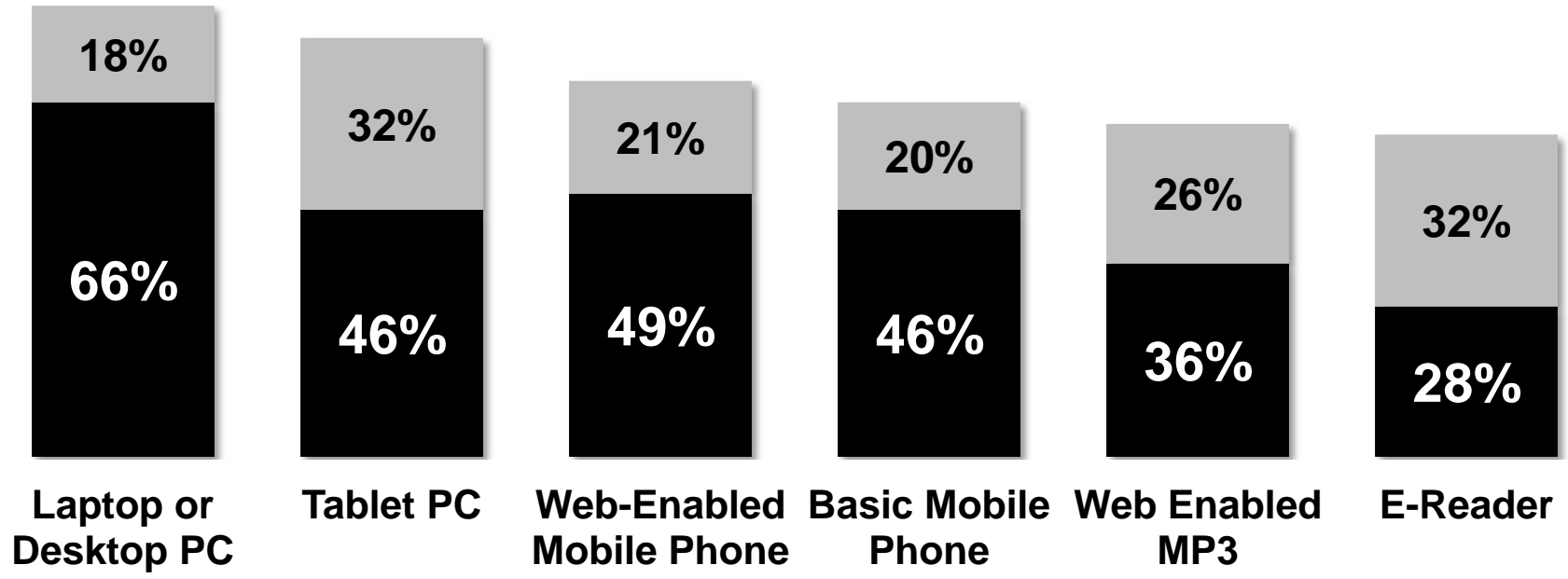
APPENDIX



PC users are bigger TV multitaskers. Tablet and mobile owners aren't far behind.

I use the following to multitask when watching TV
Among Device Owners

■ At least once a week
■ Everyday



Demographics play a key role in device driven multitasking

I use the following to multitask when watching TV everyday...
Among Device Owners

	Total	Male	Female	M(18-34)	F(18-34)	M(35+)	F(35+)
Laptop or Desktop PC	66%	64%	67%	70% ^E	67% ^E	58%	67% ^E
Web-Enabled Mobile Phone	49%	49%	49%	59% ^{EF}	55% ^{EF}	37%	42%
Tablet PC	46%	46%	46%	52% ^E	42%	36%	50%

Q: How often do you use any of the following devices while watching TV at home? Base: Own Device (Floating Bases)