

Forget Mobile — Think Multiscreen

As is the case with many new technologies, consumers are moving faster than brands. They're already using smartphones and tablet devices in front of the TV to communicate with friends and family, look up information related to the show they are watching, or else surf content that is completely unrelated to what's on the big screen. Razorfish partnered with Yahoo! to conduct a study to better understand this rapidly evolving consumer behavior and to provide guidance for how marketers should approach the corresponding opportunity.

Mobile devices are used frequently in conjunction with other screens, including the big TV in your living room. Anyone who has ever tapped out an email on their iPhone, while checking a score on the VAIO balanced on their lap, while keeping an eye on American Idol on their 40-inch BRAVIA knows this. Yet many marketers today are ignoring this ubiquitous consumer behavior as they over-focus on mobile as a stand-alone medium.

Media multitasking is not a new thing, of course. People have used laptops in front of the TV since... well, probably since the first laptop entered someone's home. We've seen data on this behavior for years, and yet, beyond putting a URL on screen or asking people to "like" a brand on Facebook, most TV spots don't acknowledge or attempt to capitalize on the fact that the consumer is watching with a Web-enabled device on their lap or in their pocket.

At a minimum, multitasking adds another layer of complexity to the evolution of media measurement. At most, it's a massive disrupter to television, the medium that receives the most ad spending. DVRs threw the industry for a loop, and

WRITTEN BY



Jeremy Lockhorn
VP, Emerging Media
@NEWMEDIAGEEK

WITH CONTRIBUTOR



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of respondents are **mobile multitasking while watching TV.**

C3 ratings were born to begin to address a world where the consumer is increasingly in control.¹ Now, add mobile and tablet multitasking to the mix and marketers everywhere wrestle with measuring the latest evolution in consumer TV viewing behavior. On one hand, there is a potential distraction factor with connected devices, and on the other, there is a much more engaged viewer who is passionately chasing down more content on devices beyond the TV. How do marketers account for that with Gross Rating Points (GRPs) and Target Rating Points (TRPs)? We don't yet have a clear answer — give us six months — but most marketers seem to be ignoring the question and failing to capitalize on the corresponding opportunity created by mobile multitasking.

Which leads us to this: Lots of data has been published about the fact that consumers are using mobile and tablet devices while watching TV, but little of it has gone deep enough to be really useful in planning a multi-screen strategy. So Razorfish

partnered with Yahoo! to conduct a survey among Web-enabled phone owners with the goal of better understanding this rapidly evolving consumer behavior and providing some guidance for how marketers should approach them.

We found that a stunning 80 percent of respondents are mobile multitasking while watching TV. Below are some highlights and key implications for marketers.

MOBILE MULTITASKING IS ADDICTIVE. 70 percent of respondents who multitask do so at least once a week, with nearly half (49 percent) reporting everyday multitasking. Furthermore, during the course of a TV program, more than 60 percent check their phones at least "once or twice," and 15 percent stay on the mobile Web for the full duration of the show.

MULTITASKING IS BOTH AN ENHANCEMENT AND A DISTRACTION. An equal percentage of multitasking respondents (38 percent) agreed or strongly agreed with these statements:

¹ "C3" TV Ratings Show Impact of DVR Ad Viewing," *blog.nielsen.com*, October 14, 2009, http://blog.nielsen.com/nielsenwire/media_entertainment/c3-tv-ratings-show-impact-of-dvr-ad-viewing/.

- 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.

This seems to be an opportunity for content producers and advertisers alike. Some people find multitasking to be a boon, and we have only begun to scratch the surface in terms of providing an engaging dual-screen experience. It's like the early days of smartphones where it was remarkable that people were making purchases from sites that were not mobile-optimized. If folks were willing to go through that much effort, it stands to reason that making the experience easier and more streamlined will lead to even more passionate participants.

CERTAIN PROGRAMMING GENRES LEND THEMSELVES TO MULTITASKING. The top five categories that attract multitaskers are:



While the top results may not seem surprising, what struck us about the results further down the list were that drama edged out genres like talk shows, music videos, how-to and others. We thought drama and action/adventure shows would be less likely to see multitasking behavior. Perhaps these intense programs stoke multitasking as viewers get hooked and seek ways to further immerse themselves in the show's world. Think about *Breaking Bad*, *CSI*, *Dexter* or *True Blood* — those shows are intense but they also beg viewers to dig a few levels deeper than what happens during those weekly 40-plus minutes.

COMMUNICATION AND CONTENT ARE THE MAIN DRIVERS FOR MULTITASKING. 94 percent of multitaskers engage in some kind of mobile communication. In order — text, talking, email, social networking and IM. It's somewhat surprising to see talking

so high and social networking so low; we expected the reverse. On the content side of things, 60 percent of multitaskers are accessing additional content of some type. 44 percent is unrelated to what's on TV versus only 38 percent related to TV. Clearly there can be a distraction factor here when it comes to TV commercial time, but the good news for marketers is that 36 percent of multitaskers use their connected devices for looking up information on a commercial they just saw.

TV AD TIME = MOBILE PRIME TIME. TV ad breaks are triggers for multitasking because phones and tablets are, not surprisingly, more likely to get fired up and accessed during regular commercial pods. And, our survey respondents were more likely to state that they frequently engaged in multitasking during ad breaks. What people do during this time doesn't change all that much. It's still communication first and content second. An analysis of mobile Web traffic to the Yahoo! homepage during this year's Academy Awards broadcast indicated clear spikes in traffic during TV ad breaks.

CONNECTED DEVICES ADD FUEL TO THE FIRE OF SPORTS FANDOM. Almost half of respondents reported multitasking during sporting events, with little difference shown between live or pre-recorded. In fact, even when attending a live sporting event in person, more than a third can't stay away from their devices. Another key difference between sports and other genres is that with sports, people are driven more by content than by communication (recall it was the other way around overall). Texting still rules, but after that, other communication styles drop off — and various content rises to the top. Leading behaviors include checking scores and schedules of other games, and looking up team and player information or statistics. Smack talking showed up surprisingly low (20 percent) — maybe that's because it's not as rewarding when you can't see the look on the other guy's face — this feels like an opportunity for an inventive developer (or enterprising marketer).

Again, an analysis of Yahoo! mobile traffic confirmed that with sports content (in this case, World Cup 2010 and Super Bowl 2011), commercial breaks spark mobile usage. Even bigger spikes are seen at halftime and after the games. For example, during the Super Bowl halftime show, Yahoo! Sports saw a 305

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percent increase in mobile traffic. After the game, even more users flooded the sports section, pushing overall increase up 387 percent. And, not surprisingly, Yahoo! saw massive spikes in mobile search traffic related to TV spots, including several movies and automobile manufacturers.

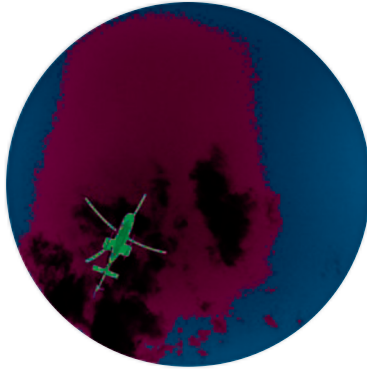
Implications for marketers

YOUR TV CONTENT STRATEGY MUST EVOLVE (AGAIN). It used to be relatively easy. Crank out a few 30-second spots and call it a day. But then came the Web, video on demand, basic interactive TV capabilities and so forth. Most marketers are still struggling to figure out how to truly capitalize on the opportunities represented by long-form video and — more recently — social content. Now, a new imperative is clear, especially for those spending heavily on TV. Content and experiences that move seamlessly from one screen to another are an absolute must. This is bigger than simply having a mobile- or tablet-optimized Web site. It means a cohesive communications strategy where the spots and the experience on mobile devices work together and build toward a greater whole. It means a mobile-optimized site that knows what's

happening in the TV spots, and perhaps even what's happening in the current program — especially if it's live. At a bare minimum, it's time to consider what kind of mobile call to action may be appropriate in the brand's TV spot.

Pepsi, Old Navy and Heineken have begun experimenting here. Pepsi gave away a free bottle of Pepsi Max to users who tagged the commercial using IntoNow, a Yahoo! social tool that allows you to share what you're watching with your friends. Old Navy's "Old Navy Records" campaign encourages users to tag spots with Shazam to unlock related content like the featured looks, and even download the music tracks for free. Heineken's Star Player app gives users the chance to play along with soccer matches by attempting to predict which team will score within the next 30 seconds. These efforts begin to show the possibilities, but are only scratching the surface.

MOBILE SEARCH IS ABOUT MORE THAN LOCAL. There's no doubt that local search is very important. After all, mobile users are accessing local search 34 percent more than they were a year ago, according to research from comScore and the Local Search Association. But, with the massive amount of multitasking behavior highlighted here combined with the various studies suggesting that anywhere from 30-40 percent of mobile data usage happens at home, mobile



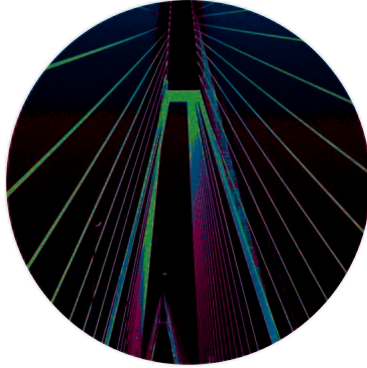
search isn't exclusively about finding the closest taco joint. Marketers must reconsider their search strategies. At a minimum, they need to ensure that their mobile properties are properly positioned in organic results. It may also be worth re-evaluating the keywords they're bidding on, perhaps to include terms that link the brand to shows and events they're sponsoring.

Let's take an automotive company launching a new luxury sports sedan, for example. Part of the launch is sponsorship of a live awards show — several spots appear throughout the show and the celebs hitting the red carpet arrive in the new vehicle. Bumpers include “sponsored by” mentions and on-screen logos. The spot closes with a URL. Some viewers might jump to their phones, fire up the browser and enter the URL. But a good portion of them will also take what they perceive to be a shortcut: typing the brand's name into a search box. Organic and paid results should appear and direct a relevant experience — perhaps the site's homepage temporarily features the new model as well as content related to the awards program. Perhaps the red carpet reporter films a walk-through of the vehicle, and that video is made available. To drive even more traffic and engagement, the brand could bid on search terms relevant to the awards show (and popular gossip sites). The call

to action could be something along the lines of “See your favorite celebs arriving in the new XYZ car,” linking through to a series of videos and also featuring the red carpet reporter's overview.

CONNECTED DEVICES ARE THE NEW WATER COOLER. People aren't waiting until the next day to discuss what happened on their favorite program anymore — it's happening in real time now, via text, email and social networking sites/services. Brands can ride along here as well, but it requires a smart social strategy that syncs the brand with the programs they're sponsoring. It's not easy, but with more than half of multitaskers getting active on social networks during TV viewing, there is a massive opportunity to engage the audience on a new platform.

In the automotive example above, there are several ways the brand might get involved in the real-time discussion. Aggregating Twitter feeds on their homepage, for example, allows users to explore the new sedan while staying connected. Perhaps sponsored tweets could go out from a few celebs talking about how much they liked the ride in the car. The brand's social network presences could all be talking about the show, perhaps launching real-time polls asking users to predict who will win the next category. And so on.



Connected devices are the **new water cooler.**

MULTITASKING MIGHT FINALLY KILL (OR AT LEAST REINVENT) THE GRP. The GRP debate rages on. The metric that has been the currency of the offline world for decades has tried time and time again to enter the digital world, only to be beaten back by legitimate arguments that it doesn't accurately account for different levels of engagement, among other weaknesses. But here's the remarkable thing about multitasking — increasingly, the devices are going to know what people are watching, providing a potentially more accurate view into what

large groups of people are tuning into. And, with so much brand engagement happening on these connected devices, effectiveness of spots may also be more accurately measured. Lastly — and this is the silver bullet — with massive growth expected in mobile payments and mobile wallets, the same device that knows what people are watching and what people are surfing will soon know what they're buying, creating the ideal closed loop for ROI-driven marketers. And who isn't ROI-driven these days? 🔥