



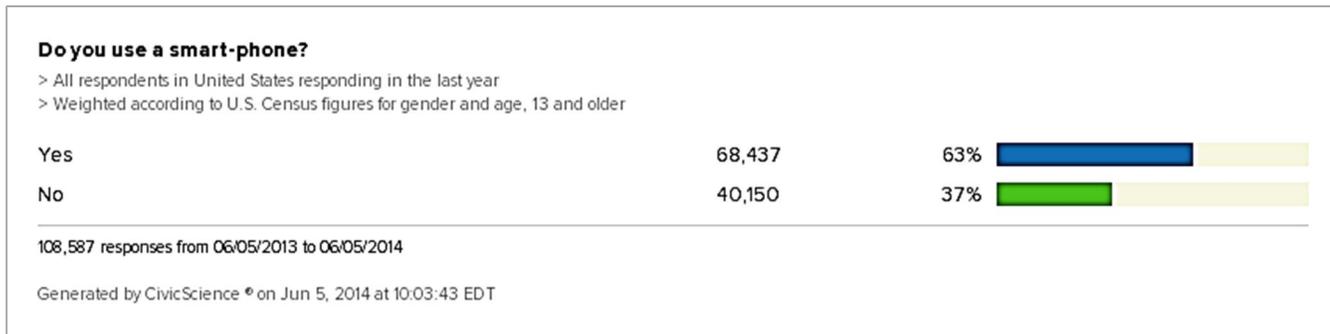
# Insight Report

## TV Viewing and the “Second Screen” – What Audiences are Doing with Mobile, Tablet Devices

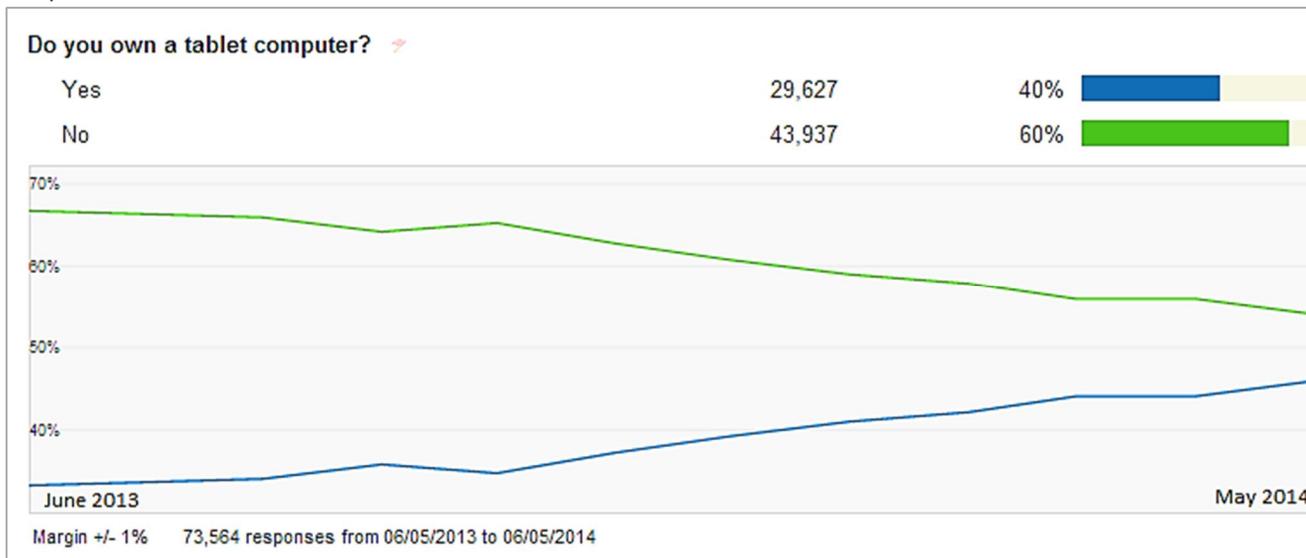
By Joel Rubinson, president and founder, Rubinson Partners | June 2014

This study by Rubinson Partners for CivicScience sheds light on the relationship between TV viewing and mobile devices from the consumer audience perspective. There is strong interest among content producers, distributors/providers, and advertisers in better understanding audience behavior given the multitude of screens easily available to most U.S. consumers today. In this report, we use data from CivicScience to surface insights about this relationship.

Let’s start with adoption levels for second screen devices. The majority of U.S. consumer respondents (63%) own a smart phone:



And ownership of tablets among U.S. consumers has been steadily rising over the last 12 months, with current adoption levels at 40%:





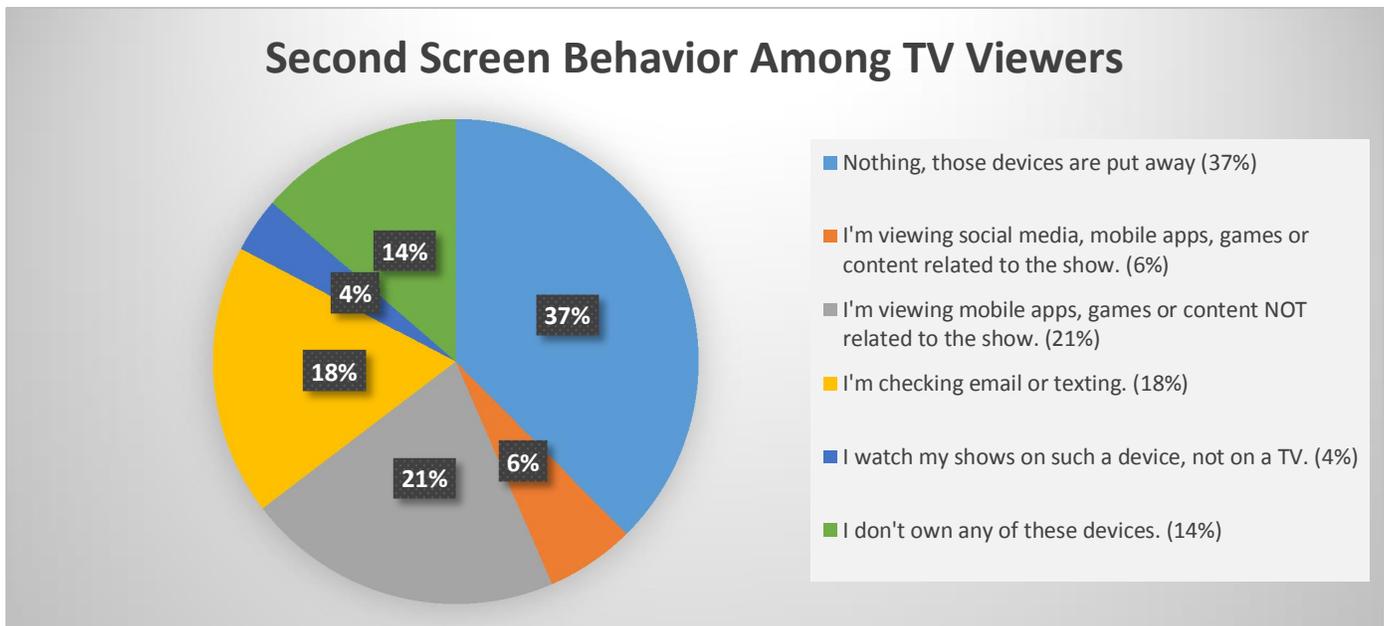
## Insight Report (continued)

We used the CivicScience syndicated polling network and InsightStore™ platform (methodology is summarized at the end of this report) to pose the following question to voluntary anonymous consumer participants, so that we could analyze more closely the dynamic between TV show viewing and these second screens:

**While you are watching your favorite shows or movies on TV, which best describes what you are doing with your smartphone, tablet, or laptop? (i.e. your "second screen")**

- Nothing, those devices are put away
- I'm reading and/or posting about the show on social media
- I'm viewing mobile apps, games or content related to the show
- I'm viewing mobile apps, games or content NOT related to the show
- I'm checking email or texting
- I watch my shows on such a device, not on a TV
- I don't own any of these devices
- I don't watch TV

We received 7,409 respondents (95% of which are U.S.-based) between 5/21/2014 and the morning of 6/3/2014. We eliminated those who don't watch TV, leaving 7,029 respondents for us to look at. Here are the top-line results:



Source: CivicScience, Inc. 7,028 respondents, weighted for U.S. Census representativeness for gender and age, 13 and older. Report date: 6/3/2014.

- Nearly half (45%) of TV watchers are multi-tasking with a second screen device. 37% of TV watchers put their devices away, and 14% don't own such devices.
- Only about 4% are using their mobile devices as a complete replacement for the big box for viewing TV content.



## Insight Report (continued)

### Of those who ARE using their devices while watching TV (3,427 respondents):

- 80% of them are distracted: they are checking e-mail, texting, or interacting with websites or apps that are **unrelated** to the show they are watching on TV.
- 12% of them are **engaged** with the show's content, with 64% of those engaged via social media and the rest interacting with apps or website content related to the show.
- The remaining are watching the TV content on these devices.

### The Age Factor:

When we look at the behaviors by age group, we see that most viewers are engaged at the same rate (roughly 2%) with show-related websites and games, while the younger viewers, aged 13 to 24, are much more likely to be interacting about the show on social sites:

Mobile Engagement	Ages 13-24	Ages 25-34	Ages 35-54
Engaged with show on social media site	9%	4%	2%
Engaged with show via websites, games, etc.	2.4%	2.4%	2.3%

Another way to look at the age groupings are by adults only and showing the very clear second-screen engagement distinction between Millennials and older age groups:

U.S. Adults - TV Viewing & Second Screens	Ages 18 to 34	Ages 35 to 54	Ages 55+
Nothing, those devices are put away.	28%	41%	46%
I'm reading and/or posting about the show on social media.	6%	2%	1%
I'm viewing mobile apps, games or content related to the show.	3%	2%	1%
I'm viewing mobile apps, games or content NOT related to the show.	29%	23%	11%
I'm checking email or texting.	24%	19%	14%
I watch my shows on such a device, not on a TV.	6%	1%	1%
I don't own any of these devices.	4%	11%	26%

### Effect of TV Viewing Levels:

When we look at the average consumption amount per day of TV content reported by respondents, we see an interesting pattern. We classified the hours of TV watched into three categories: Light (less than 2 hours per day); Medium (2-4 hours per day); and Heavy (4+ hours per day).

- Heavy viewers are somewhat more likely to be engaged with their second screen devices overall (45%) vs. Medium and Light viewers (both at 42%).
- Respondents watching Medium levels of TV on average per day are 2X more engaged with content related to the show than Light viewers (6% vs. 3%), while Heavy viewers fall in the middle (4%).



## Insight Report (continued)

### Summary:

The greater opportunity for advertisers might be to time their advertising on digital devices, via programmatic buying, with the timing of their TV commercials – and to do so across more than the show’s apps or website.

Synchronized second screen experiences have not hit “prime time” yet, as the large majority of TV viewers are engaged in distracting second screen behavior. Well-timed and well-placed online advertising that targets viewers on non-related sites may be warranted, as does getting a deeper profile of viewers who are showing better levels of online show engagement.

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**About the CivicScience methodology for this study:** Responses to the primary poll question that ran on the CivicScience syndicated network across hundreds of U.S. publisher websites were collected from May 21, 2014 to June 3, 2014. These anonymous responses were weighted for U.S. Census representativeness by gender and age, 13 years and older. Approximately 95% of respondents were U.S. based. The CivicScience InsightStore™ was used to cross-tabulate those respondents against other questions they have previously answered. A minimum of 1,000 combined responses to any cross-tabbed questions were required to be included in this analysis.

**Joel Rubinson Biography:** Joel is President and founder of Rubinson Partners, established in 2010. Prior to starting his consultancy, as Chief Research Officer at The Advertising Research Foundation (ARF), Joel interacted directly with hundreds of research leaders and drove the organization’s initiatives regarding listening, research transformation, and shopper path to purchase. Prior to joining the ARF, Joel was Senior Vice President, Head of Advanced Solutions for Synovate North America where he was their leading branding resource and was also the global thought leader for shopper research. Before that, Joel was managing director the advanced research for a leading consultancy, Vivaldi Partners. Joel was at The NPD Group for many years, leading the creation of modeling approaches for brand equity management, new product forecasting, category management and designed many of their data collection and sampling methodologies. Joel started his research career at Unilever. Joel is also a published author of numerous papers in professional journals and frequent speaker at industry conferences. He has taught the official American Marketing Association advanced tutorial on brand loyalty. Joel holds an MBA in statistics and economics from the University of Chicago and a BS from NYU. Blog: <http://blog.joelrubinson.net/>