CONCURRENT PLATFORM USAGE STUDY

Janet Gallent, NBC Universal
CONCURRENT PLATFORM COMMITTEE

> Tim Brooks
> Natalie Davis
> Janet Gallent (Chair)
> Hadassa Gerber

> Janice Finkel-Greene
> Ceril Shagrin
> Redjeb Shah
> Lauren Walton (Nielsen)
> Richard Zackon (CRE Facilitator)
BACKGROUND: 2014 MCE CROSS PLATFORM METRICS ALIGNMENT

Interviews with experts from different sectors of media business

> Conducted by Betsy Frank Insights/Horowitz Research
> Challenges in establishing a cross platform currency

2015 MCE research projects:

> Aligning metrics across the platforms
> Understanding concurrent platform usage
RESEARCH QUESTIONS ABOUT CONCURRENT PLATFORM USAGE

> How much is happening? By Whom? And Why?
> What media platforms are being used? When? And for How long?
> Which combinations of media platforms are most commonly used?
> What is the perceived impact on attention?
> What are the implications of concurrent platform usage on measurement?
RESEARCH DESIGN & GOALS: GfK

**Quantitative Online Survey**

Size Concurrent Usage Across Platforms

4,020 P13+
GfK Knowledge Panel® (Spanish Dominant sub-sample)

Yesterday media use
• 6 Media Platforms
• 6 Dayparts
• Not just video

Sept. 9 – 28, 2015

**Passive Measurement**

Digital Concurrence at Content Level

310 A18+
GfK Knowledge Panel®
Digital participants

2 Week Track of PC plus
• Smartphone and/or
• Tablet

Sept. 7 – 20, 2015

**Qualitative Deep Dives**

“Why” behind concurrent media use

90 A18+
Quantitative Participants (across US)

In-Home or Remote Session

Oct. 21 – Nov. 30, 2015
MEDIA PLATFORMS TESTED

- **Quantitative Online Survey**
  - TV (Any TV screen use)
  - Computer (Desktop or Laptop)
  - Smartphone
  - Audio (Radio or other audio only device)
  - Print (Printed Newspaper or Magazine)

- **Qualitative Deep Dives**
  - Tablet/E-reader

- **Passive Measurement**
  - Personal Computer
  - Smartphone
  - Tablet

* Passive Measurement: The panel used for the passive measurement portion of this study, KnowledgePanel® Digital, does not passively measure TV. Users with a tracked computer had to have at least one mobile device tracked (Smartphone or Tablet).
68% of Persons 13+ use two or more media platforms at the same time in an average day.

Skews female, upscale and have children in the household; Also higher tech ownership.

19% One in five of consumers are heavy concurrent platform users (6+ concurrent usage events in an average day).

Base: Total Gen Pop 13+ (N=3,165), Concurrent User (N=2,203), Non-Concurrent User (N=962)
AVERAGE DAILY USERS OF MEDIA OVERALL & CONCURRENT WITH OTHER MEDIA: GENERAL POPULATION P13+

75

63

60

51

31

25

TV
Computer
Smartphone
Audio
Print
Tablet/E-reader

% Use this Media

Base: Total Gen Pop 13+ (N=3,165)
Which of the following did you use at any time yesterday for any reason? Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…
In a typical day, at least 40% of P13+ use a TV, computer or smartphone concurrently with another media platform.
In an average day, 77% of smartphone users consume other media at the same time, the highest of all platforms.
TOTAL AND CONCURRENT USE BY DAYPART BY PLATFORM: GENERAL POPULATION P13+

Concurrent use of computers & smartphones consistently high throughout the day
Concurrent use of tablets highest in primetime

Base: Total Gen Pop 13+ (N=3,165)
At any time between [daypart] yesterday did you use …(asked for all media and dayparts)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…

TV+

Audio+

Print+

Computer+

Smartphone+

Tablet+

Any Use

Concurren...
CONCURRENT TIME SPENT BY PLATFORM: GENERAL POPULATION P13+

The average P13+ watches TV for 4 hours and 12 minutes a day; 1 hour of this TV time is spent using another media device at the same time.

Total Media Time = 11:58
SHARE OF TIME SPENT THAT MEDIA WAS USED CONCURRENTLY IN AVERAGE DAY: GENERAL POPULATION P13+

Base: Total Gen Pop 13+ (N=3,165)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also...
Note: Size of circle represents the incidence of the platform in an average day: the larger the circle, the higher the incidence of platform use; the smaller the circle, the lower the incidence of platform use
COMBINATIONS OF MEDIA USED CONCURRENTLY IN AN AVERAGE DAY: GENERAL POPULATION P13+

TV, Smartphone and Computer are the three media platforms most commonly used together in an average day.

[Bar chart showing combinations of media used concurrently]

Base: Total Gen Pop 13+ (N=3,165)

Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…

Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
COMBINATIONS OF MEDIA USED CONCURRENTLY IN AN AVERAGE DAY: AGE GROUP INDEXED TO GEN POP 13+

A55+ over-index on using print and another media platform concurrently
Teens and Young Adults over-index on using smartphones concurrently

% Gen Pop 13+
31% 25% 24% 16% 13% 11% 10% 9% 8% 6% 5% 5% 4% 3% 1%

Indexed to Total..

Base: Total Gen Pop 13+ (N=3,165), A13-17 (N=265), A18-34 (N=612), A35-54 (N=928), A55+ (N=1,360)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…
Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
COMBINATIONS OF CONCURRENT MEDIA: HISPANIC POP

Audio and Smartphone concurrence is greater among Hispanics

Concurrent use of audio plus computer or smartphone is 1.5x+ higher among Spanish dominant Hispanics vs. English dominant

Indexed to Gen Pop 13+

Base: Total Hispanics 13+ (N=1,066); Total Gen Pop 13+ (N=3,165)

Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
PRIMETIME CONCURRENT USE COMBINATIONS

38% of P13+ use at least two media concurrently during primetime in an average day

<table>
<thead>
<tr>
<th>Combination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV and Smartphone</td>
<td>17%</td>
</tr>
<tr>
<td>TV and Computer</td>
<td>12%</td>
</tr>
<tr>
<td>TV and Tablet</td>
<td>8%</td>
</tr>
<tr>
<td>Computer &amp; Smartphone and Tablet</td>
<td>7%</td>
</tr>
<tr>
<td>TV and Print</td>
<td>3%</td>
</tr>
<tr>
<td>Audio and Smartphone</td>
<td>3%</td>
</tr>
<tr>
<td>Computer and Tablet</td>
<td>2%</td>
</tr>
<tr>
<td>TV and Audio</td>
<td>2%</td>
</tr>
<tr>
<td>Audio and Computer</td>
<td>1%</td>
</tr>
<tr>
<td>Computer and Print</td>
<td>1%</td>
</tr>
<tr>
<td>Print and Smartphone</td>
<td>1%</td>
</tr>
<tr>
<td>Print and Tablet</td>
<td>0%</td>
</tr>
<tr>
<td>Audio and Print</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: Total Gen Pop 13+ (N=3,165)

Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…

Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
TOTAL TIME SPENT USING MEDIA CONCURRENTLY IN AVERAGE DAY: GENERAL POPULATION P13+

Among Persons 13+

14% of total media time is concurrent use

Average Daily Time (h:mm)

1:40 concurrent use

11:58 total media

Time Spent on Top 5 Combinations (h:mm)

<table>
<thead>
<tr>
<th>Combination</th>
<th>Time Spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV and Smartphone</td>
<td>0:19</td>
</tr>
<tr>
<td>TV and Computer</td>
<td>0:23</td>
</tr>
<tr>
<td>Computer and Smartphone</td>
<td>0:13</td>
</tr>
<tr>
<td>Audio and Smartphone</td>
<td>0:08</td>
</tr>
<tr>
<td>TV and Tablet</td>
<td>0:09</td>
</tr>
</tbody>
</table>

As a proportion of total media time, concurrent usage is relatively low
Top 3 combinations account for 55% of all time spent concurrently

Base: Total Gen Pop 13+ (N=3,165) Includes non-concurrent users
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also...
Rank ordered from high to low on total day incidence
TOTAL TIME SPENT USING MEDIA CONCURRENTLY IN AVERAGE DAY: CONCURRENT USERS

> Concurrent users spend 25 min more than gen pop on Top 3 combinations
> Top 3 combinations account for 55% of all time spent concurrently

Among Concurrent Users

17% of total media time is concurrent use

Average Daily Time (h:mm)

2:27 concurrent use 14:44 total media

Time Spent on Top 5 Combinations (h:mm)

- TV and Smartphone
  - 0:28
  - +9 min vs. gen pop

- TV and Computer
  - 0:34
  - +11 min vs. gen pop

- Computer and Smartphone
  - 0:19
  - +6 min vs. gen pop

- Audio and Smartphone
  - 0:11

- TV and Tablet
  - 0:13

Base: Total Gen Pop 13+ (N=3,165), Concurrent User (N=2,203)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also...
Rank ordered from high to low on total day incidence
## Concurrent Users Demographic and Media Usage Profile

Concurrent platform users are higher on tech ownership than non-concurrent platform users.

<table>
<thead>
<tr>
<th>Concurrent Group</th>
<th>Concurrent time per day</th>
<th>Total Media Day</th>
<th>% Concurrent usage in average day</th>
<th>Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy Users</td>
<td>5:09</td>
<td>20:58</td>
<td>25%</td>
<td>Young, upscale, have children in HH</td>
</tr>
<tr>
<td>6+ events per day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium Users</td>
<td>2:14</td>
<td>14:43</td>
<td>15%</td>
<td>Female, more affluent than heavy users</td>
</tr>
<tr>
<td>3-5 events per day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light Users</td>
<td>0:44</td>
<td>10:21</td>
<td>7%</td>
<td>White, employed</td>
</tr>
<tr>
<td>1-2 events per day</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
While “heavy” concurrent users account for 28% of total concurrent media users, they account for 58% of total concurrent time spent.

68% concurrent users

- **Heavy**: 19% of total population, 28% of concurrent users, 58% of concurrent time
- **Medium**: 23% of total population, 34% of concurrent users, 31% of concurrent time
- **Light**: 26% of total population, 38% of concurrent users, 11% of concurrent time
- **No Concurrent Use**: 32% of total population
DIGITAL CONCURRENT USE VS. OTHER MEDIA: CONCURRENT USERS

Almost all concurrent users report digital concurrent use

94% report Digital Concurrent Use
(Computer, Smartphone or Tablet used with any other device)

80% report TV Concurrent Use
(TV used with any other device)

77% report Mobile Concurrent Use
(Smartphone or Tablet used with any other device)

39% report Audio Concurrent Use
(Radio/Audio device used with any other device)

Among the 68% of concurrent users...

Base: Concurrent Users (N=2,203)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also...

Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
DIGITAL ONLY CONCURRENT BEHAVIOR: PC WITH SMARTPHONE OR TABLET

15% of all passively metered respondents engaged in any digital concurrent activity in an average day.

90% of digital concurrent users engaged in key concurrent activities less than twice a day.

Typical digital concurrence activity lasted 30 seconds.

First bullet point based on n=310 panelists in the passive digital metering study. Second and Third bullets based on n=147 panelists who tracked concurrence with key digital properties.
DIGITAL CONCURRENCE WITH KEY DIGITAL PROPERTIES AND AVERAGE TIME SPENT: DIGITAL ONLY CONCURRENT USERS

% who were on this type of site/app while also on another digital device over the course of two weeks

- Social Network: 58% for 3:51 mins:secs
- Search Engines (Google): 50% for 0:56 mins:secs
- Other portal activities: 47% for 3:10 mins:secs
- Mail: 34% for 1:20 mins:secs
- Video Aggregator: 24% for 1:30 mins:secs
- News & Weather: 16% for 1:25 mins:secs
- Music Only (does not...): 12% for 2:17 mins:secs
- Chat: 12% for 1:35 mins:secs
- Entertainment Portal...: 12% for 0:55 mins:secs
- Movies/Premium Content: 10% for 2:02 mins:secs
- Cable Ent & Broadcast TV: 9% for 0:38 mins:secs
- Sports: 7% for 7:07 mins:secs
- Maps: 7% for 0:43 mins:secs

n=147 panelists who tracked concurrence with key digital properties
MOTIVATIONS FOR CONCURRENT MEDIA USE

- Making “good” or “better” use of time
- Changing perception of time
- Mental stimulation
- Facilitating being together
GROUP VIEWING AND CONCURRENT MEDIA USAGE

> Highest when togetherness is the only reason for being in the room
> Lowest when content is the reasons for group viewing
> Concurrent usage levels vary across the continuum (e.g., peripheral or incidental viewing)
CONCURRENT USAGE – SELF-REPORTED IMPACT ON ATTENTION

> Concurrent users intentionally configure media and content combinations to allow for desired levels of attention

> I know I’m missing some things, but that’s okay
> While concurrent users manage attention around media and content, they also behave responsively to content streams

  • Audio cues (e.g. music, volume, keywords) were a common draw to switch from one device to another

> The playback activity revealed these unconscious behaviors
CONCURRENT PLATFORM USAGE – RELATED VS. UNRELATED CONTENT

Most concurrent use is **unrelated to main content**.

When related use does occur, it is **to get more information**

Common with sports, news, and ads

Typically performed using a **mobile device**
IDENTIFYING PRIMARY MEDIA

- Primariness is not inherent to any device
- Primariness is influenced by intended action
- Contexts change primariness
- Users actively manage primariness
SO WHAT DOES THIS MEAN?

> Many people use media concurrently in a typical day but not for long periods of time
  • 68% of P13+ use media concurrently in an average day
  • Only 14% of the total media day is spent using two+ media platforms concurrently

> Most are moderate/light concurrent users; 1 in 5 P13+ are heavy concurrent users
  • Heavy concurrent users are younger
  • Account for 58% of all concurrent platform use in an average day

> Smartphone especially likely to be used concurrently with other media
  • Radio/Audio-only device users are least likely to do so

> TV, Computer and Smartphone are especially likely to be used in combination
  • These three combinations account for 55% of all concurrent time spent in an average day

> Concurrent users intentionally configure media and content combinations to allow for desired levels of attention
RESEARCH LIMITATIONS

> Self-reported time spent using media concurrently likely understated
  • Short, digital “bursts” of concurrent activities
  • Other unconscious concurrent behaviors

> Passive digital metering data for concurrent use of PC likely to be understated
  • Only measured personal PC which may not capture workplace usage

> Important to have passive digital metering on the TV as viewing through Smart TV sets and connected devices continues to increase

> Measuring impact of concurrent platform usage on attention needs more rigorous exploration, possibly through biometrics
> Consistent with CRE VCM study, time spent with digital media overestimated; traditional media underestimated

<table>
<thead>
<tr>
<th>Average Day</th>
<th>% P18+ REACHED Nielsen</th>
<th>% P18+ GFK Knowledge Panel</th>
<th>Self Reported Average Daily Reach</th>
<th>Time Spent in Average Day Total P18+ Nielsen</th>
<th>Time spent in avg day Total P18+ GFK</th>
<th>Self Reported Time Spent in Average Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV+TV-Connected</td>
<td>69%</td>
<td>75%</td>
<td>Over estimated</td>
<td>5:02</td>
<td>4:18</td>
<td>Under estimated</td>
</tr>
<tr>
<td>Radio</td>
<td>68%</td>
<td>52%</td>
<td>Under estimated</td>
<td>1:50</td>
<td>1:19</td>
<td>Under estimated</td>
</tr>
<tr>
<td>Smartphone</td>
<td>60%</td>
<td>59%</td>
<td>Good estimate</td>
<td>1:09</td>
<td>2:13</td>
<td>Over estimated</td>
</tr>
<tr>
<td>PC</td>
<td>32%</td>
<td>63%</td>
<td>Over estimated</td>
<td>0:41</td>
<td>3:01</td>
<td>Over estimated</td>
</tr>
<tr>
<td>Tablet</td>
<td>21%</td>
<td>25%</td>
<td>Good estimate</td>
<td>0:22</td>
<td>0:44</td>
<td>Over estimated</td>
</tr>
</tbody>
</table>
QUESTIONS FOR CROSS PLATFORM, CONCURRENT PLATFORM MEASUREMENT

> How should concurrent use be measured?
  • How to combine audience-centric (TV, radio) with device-centric (digital) measures?
  • Should analog (newspapers, magazines, books) media be included?
    And if so, how?

> How do we define and measure attentiveness or primariness?
  • “Eyes on” is a relatively easy measure, but how to measure “ears on”?
  • How to measure the “primariness” in highly specific contexts?

> How to report or integrate concurrence and attentiveness into audience data?
  • How would such data be used in the marketplace
    (by media sellers or media buyers)?
THANK YOU
## MASTER LIST OF KEY DIGITAL SITES

<table>
<thead>
<tr>
<th>Broadcast</th>
<th>Cable Ent</th>
<th>Cable News &amp; Sports</th>
<th>MVPD</th>
<th>Chat</th>
<th>Entertainment Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>ABC Family</td>
<td>Disney Jr</td>
<td>Syfy</td>
<td>CBS News</td>
<td>AT&amp;T U-Verse</td>
</tr>
<tr>
<td>CBS</td>
<td>AMC</td>
<td>Disney XD</td>
<td>TBS</td>
<td>CNN</td>
<td>Comcast</td>
</tr>
<tr>
<td>CW</td>
<td>BET</td>
<td>Food</td>
<td>TLC</td>
<td>ESPN</td>
<td>Cablevision</td>
</tr>
<tr>
<td>FOX</td>
<td>Cartoon Network</td>
<td>HGTV</td>
<td>TNT</td>
<td>Fox News</td>
<td>Cox TV Connect</td>
</tr>
<tr>
<td>NBC</td>
<td>Centric TV</td>
<td>History</td>
<td>TruTV</td>
<td>Fox Sports</td>
<td>Direct TV</td>
</tr>
<tr>
<td>PBS</td>
<td>CMT</td>
<td>Lifetime</td>
<td>TV Land</td>
<td>MTV News</td>
<td>DISH</td>
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<tr>
<td>Telemundo</td>
<td>Comedy Central</td>
<td>Logo</td>
<td>USA</td>
<td>NBC News</td>
<td>Time Warner</td>
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<tr>
<td>Univision</td>
<td>Discovery</td>
<td>Nickelodeon</td>
<td>VH1</td>
<td>Verizon FIOS</td>
<td>Skype</td>
</tr>
<tr>
<td></td>
<td>Disney Channel</td>
<td>Spike</td>
<td></td>
<td></td>
<td>SMS (Cell)</td>
</tr>
</tbody>
</table>
# MASTER LIST OF KEY DIGITAL SITES

<table>
<thead>
<tr>
<th>Internet Radio</th>
<th>Movies/Premium Content</th>
<th>Music Only</th>
<th>Search Engine-Mail Provider</th>
<th>Social Media</th>
<th>Streaming Video</th>
<th>Video Aggregator</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccuRadio</td>
<td>Amazon Prime</td>
<td>Apple Music</td>
<td>Google</td>
<td>Snapchat</td>
<td>Popcorn Time</td>
<td>Frequency</td>
</tr>
<tr>
<td>Iheartradio</td>
<td>Cinemax</td>
<td>Jango</td>
<td>Yahoo</td>
<td>Tweetdeck</td>
<td>Epix</td>
<td>Funnyordie</td>
</tr>
<tr>
<td>Live365</td>
<td>Crackle</td>
<td>Pandora</td>
<td>MSN</td>
<td>HootSuite</td>
<td>Twitch</td>
<td>Showyou</td>
</tr>
<tr>
<td>NPR</td>
<td>Google Play</td>
<td>Plug.dj</td>
<td></td>
<td>Vine</td>
<td></td>
<td>SlingTV</td>
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<tr>
<td>RadioTuna</td>
<td>HBO</td>
<td>Rdio</td>
<td></td>
<td>Facebook</td>
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<td>SlackerRadio</td>
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<td>Linked In</td>
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<td>VevoTV</td>
</tr>
<tr>
<td>Tuneln</td>
<td>Netflix</td>
<td>Spotify</td>
<td></td>
<td>Twitter</td>
<td></td>
<td>Vodio</td>
</tr>
<tr>
<td>Showtime</td>
<td>Google Music</td>
<td></td>
<td></td>
<td>Pinterest</td>
<td></td>
<td>YouTube</td>
</tr>
<tr>
<td>Starz</td>
<td>Sirius/XM</td>
<td></td>
<td></td>
<td>Instagram</td>
<td></td>
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<tr>
<td>Vessel</td>
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</tbody>
</table>
RECENTLY IN THE PRESS: MULTI-TASKING MILLENNIALS

The Deloitte Digital Democracy study
Nov. 5 to 19, 2015
Online survey of 2,205 P14+
(data weighted to the most recent U.S. census)

Difference between average day vs. “almost always/always”

Which are things you **typically** do while watching your home TV?

• Browse and surf the web (33%)
• Use a social network site (29%)
• Read email (29%)
• Text message (26%)
• Browse for products/services online (23%)
• Play video games (19%)
• **Nothing else-just watch TV** (8%)

Finding: 92% of consumers are multitasking while watching TV
And Millennials are typically, on average, doing four additional activities while watching TV
INSIGHTS & IMPLICATIONS FOR MEASUREMENT

> Many people exhibit concurrent media use but not for much of their media day
> TV, PC, and Smartphone are the dominant combinations used concurrently
> Most concurrent usage is unrelated; however, genres like sports and news generate more related concurrent usage than most
> Hispanics spend more time with concurrent media
> Users engage in concurrent use to fulfill specific needs
> Digital concurrent use puts focus on out-of-home measures
> Users may not always be aware that they are using media concurrently (e.g., short “digital” bursts), impacting self-report measures
> “Primariness” is highly context-specific
AVERAGE DAILY USE OF MEDIA OVERALL & CONCURRENT WITH OTHER MEDIA: P13+

**Base: Total Gen Pop 13+ (N=3,165)**

Which of the following did you use at any time yesterday for any reason?

Out of the [fit] minutes you spent with a [media] during that time, how many of those minutes were you also…

<table>
<thead>
<tr>
<th>Avg. Daily Time Spent (h:mm)</th>
<th>TV</th>
<th>Computer</th>
<th>Smartphone</th>
<th>Audio</th>
<th>Print</th>
<th>Tablet/E-reader</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:12</td>
<td>75%</td>
<td>52%</td>
<td>63%</td>
<td>60%</td>
<td>51%</td>
<td>26%</td>
</tr>
<tr>
<td>3:03</td>
<td></td>
<td>43%</td>
<td>46%</td>
<td></td>
<td>31%</td>
<td>17%</td>
</tr>
<tr>
<td>2:22</td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>1:17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>0:19</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25%</td>
</tr>
<tr>
<td>0:44</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>17%</td>
</tr>
</tbody>
</table>
Combinations involving TV, computers, and smartphones dominate the top concurrent use combinations across all usage groups.

**Heavy Users** (6+ events per day):
- 72% TV and Smartphone
- 63% Computer and Smartphone
- 59% TV and Computer

**Medium Users** (3-5 events per day):
- 45% TV and Smartphone
- 37% TV and Computer
- 35% Computer and Smartphone

**Light Users** (1-2 events per day):
- 26% TV and Smartphone
- 22% TV and Computer
- 17% Computer and Smartphone

Base: Concurrent Users 13+: Heavy (N=595), Medium (N=745), Light (N=863)

Out of the [X] minutes you spent with a [media] during that time, how many of those minutes were you also...

Note: Combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations within their user group.
CONCURRENT USAGE – SELF-REPORTED IMPACT ON ATTENTION

> Attention shifts from one media to another when ads play
> When attention is divided, less is recalled
> Some concurrent use does facilitate investigation of products
> Friday had the most passive respondents tracking concurrent behavior with key digital properties

No statistically significant differences in digital concurrent use with key digital properties across days of the week

<table>
<thead>
<tr>
<th>Day</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>42%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>44%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>47%</td>
</tr>
<tr>
<td>Thursday</td>
<td>42%</td>
</tr>
<tr>
<td>Friday</td>
<td>50%</td>
</tr>
<tr>
<td>Saturday</td>
<td>44%</td>
</tr>
<tr>
<td>Sunday</td>
<td>43%</td>
</tr>
</tbody>
</table>

Slight uptick in users (<5%) tracking digital concurrent use on entertainment portals and mail.

Slight uptick in users (<5%) tracking digital concurrent use on social networks and video aggregators.

Base: Passive Respondents - Concurrent Users of Key Digital Properties (n=147)
DIGITAL CONCURRENCE ACROSS AN AVERAGE DAY

> Concurrent digital use more common in working hours for passive sample
> The drop during the 8PM hour is likely due to the television screen replacing a digital screen for these users
## DURATION OF DIGITAL CONCURRENT ACTIVITY

<table>
<thead>
<tr>
<th></th>
<th>Over two weeks</th>
<th>During Primetime 7pm-11pm</th>
<th>From 2pm-6pm</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Average digital concurrence is a “burst”</strong></td>
<td>29 seconds</td>
<td>25 seconds</td>
<td>31 seconds</td>
</tr>
</tbody>
</table>

*Only includes passive digital concurrence between smartphone, tablets, and PCs
**Directional/not determined to be significantly different

Base: Passive Respondents - Concurrent Users of Key Digital Properties (over two weeks n =147; primetime n=102; 2-6pm n=136)
SHARE OF TOTAL TIME SPENT USING MEDIA PLATFORMS (AVERAGE DAY)

Concurrent usage is proportionately similar to average daily media usage

Base: Concurrent Users (N=2,203), Total Gen Pop 13+ (N=3,165)
Which of the following did you use at any time yesterday for any reason?
For about how long did you use a [media] to…(asked for all media and dayparts)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…
CONCURRENT USE AND AD EXPOSURE DIFFER BY GENRE

Favorite Shows

> Less concurrent use
> Concurrent use will facilitate engagement with characters and story
> Social media
> Avoid ads: still fast forward through ads or watch via streaming
  • If fast forward or left room, final ad is likely viewed
“BURSTS” OF DIGITAL CONCURRENT ACTIVITY

Most digital use is unrelated to main content.

One device receives steady focus, other used in bursts (\(\bar{x} 29\) sec.)

Related use does occur for longer bursts for certain genres - e.g. for sports, looking up players, reading stats, meta game info.
The same top five combinations were found during qualitative research.

Within combinations the medium which was primary was consistent, but contextually dependent (primary medium identified in qual indicated in red box below).

- TV and Smartphone: 31%
- TV and Computer: 25%
- Computer and Smartphone: 24%
- Audio and Smartphone: 16%
- TV and Tablet: 13%

Base: Total Gen Pop 13+ (N=3,165)
Out of the [#] minutes you spent with a [media] during that time, how many of those minutes were you also…

Note: Concurrent use combinations are not mutually exclusive. Respondents may meet criteria across multiple combinations.
**AVerage Time Spent by Digital Concurrent Activity Type Over Two Weeks**

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Percentage</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Network</td>
<td>58%</td>
<td>03:51</td>
</tr>
<tr>
<td>Search</td>
<td>50%</td>
<td>00:56</td>
</tr>
<tr>
<td>Other Portal Activities</td>
<td>47%</td>
<td>03:10</td>
</tr>
<tr>
<td>Mail</td>
<td>34%</td>
<td>01:20</td>
</tr>
<tr>
<td>Video Aggregator</td>
<td>24%</td>
<td>01:30</td>
</tr>
<tr>
<td>News &amp; Weather</td>
<td>16%</td>
<td>01:25</td>
</tr>
<tr>
<td>Chat</td>
<td>12%</td>
<td>01:25</td>
</tr>
<tr>
<td>Music</td>
<td>12%</td>
<td>02:17</td>
</tr>
<tr>
<td>Ent. Portal</td>
<td>12%</td>
<td>00:55</td>
</tr>
<tr>
<td>Movies/Prem Content</td>
<td>10%</td>
<td>01:20</td>
</tr>
<tr>
<td>Maps</td>
<td>7%</td>
<td>00:43</td>
</tr>
<tr>
<td>Sports</td>
<td>7%</td>
<td>07:07</td>
</tr>
</tbody>
</table>

*High digital concurrence with sports content could be attributed to time of year i.e. beginning of football season
*Base: Passive Respondents - Concurrent Users of Key Digital Properties (n=147)
CONCURRENT USAGE: HISPANIC POP

68% Concurrent Users

English Dominant 64%
Spanish Dominant 70%

(vs. 68% Gen Pop 13+)

16% of total media time is concurrent use
(vs. 14% Gen Pop 13+)

Average Daily Time (h:mm)
2:16 concurrent use
(vs. 1:40 Gen Pop 13+)
14:31 total media
(vs. 11:58 Gen Pop 13+)

Among Hispanic Gen Pop…
THANK YOU