

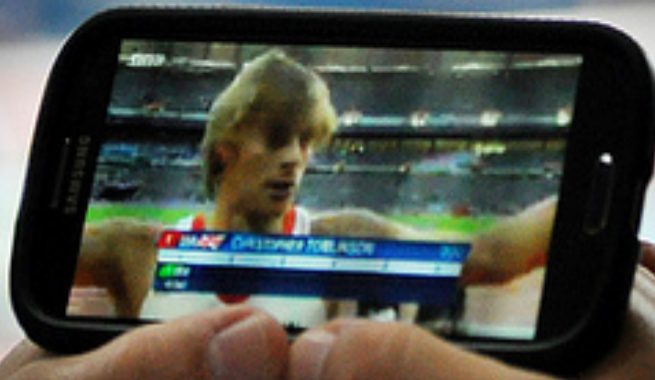


The Multi-Screen Olympics

Google research into London 2012 Olympic-related media consumption across four screens in the UK

Mark Riseley, Senior Research Manager , Google UK

We live in a multi-screen world



How does that affect live event experiences?

Olympics by the numbers

The event cost ~ £8.8 billion to stage

4 billion global viewers, 90% of UK population tuned in (15 mins+)

~21,000 accredited media workers covering the Games

Up to 24 dedicated BBC TV channels on cable / satellite / online

8.8 million tickets sold for 302 medal events at 34 venues

Estimated 20 million spectator journeys in London

London 2012 online: 431m visitors, 15m app downloads

UK 2012 Olympics primary research objectives

Understand the roles of different screens in following the Olympics

- Focus on television, smartphones, tablets and computers
- Time spent, locations used and types of content accessed across devices
- Multi-screening and simultaneous device usage
- How smartphones are used while attending the Olympics

Establish if compelling Olympic content drives people to try new media behaviors

- eg catch up video, live streaming on mobiles, sharing on social networks

Studies referred to in this presentation

Device ownership and usage study (TNS)

- TNS nationally representative phone survey to establish device access & usage

Olympic media usage tracker (YouGov)

- Questions inserted into daily YouGov online Omnibus survey
- Representative sample, timely survey on recent Olympic media activity

Media diary study of digitally savvy Olympic enthusiasts (Sparkler)

- Early adopter / ticket holder sample given smartphone-based media diary app
- In-depth exploration of Olympic media consumption

Analysis of EE mobile network online usage during the Olympics (Ipsos)

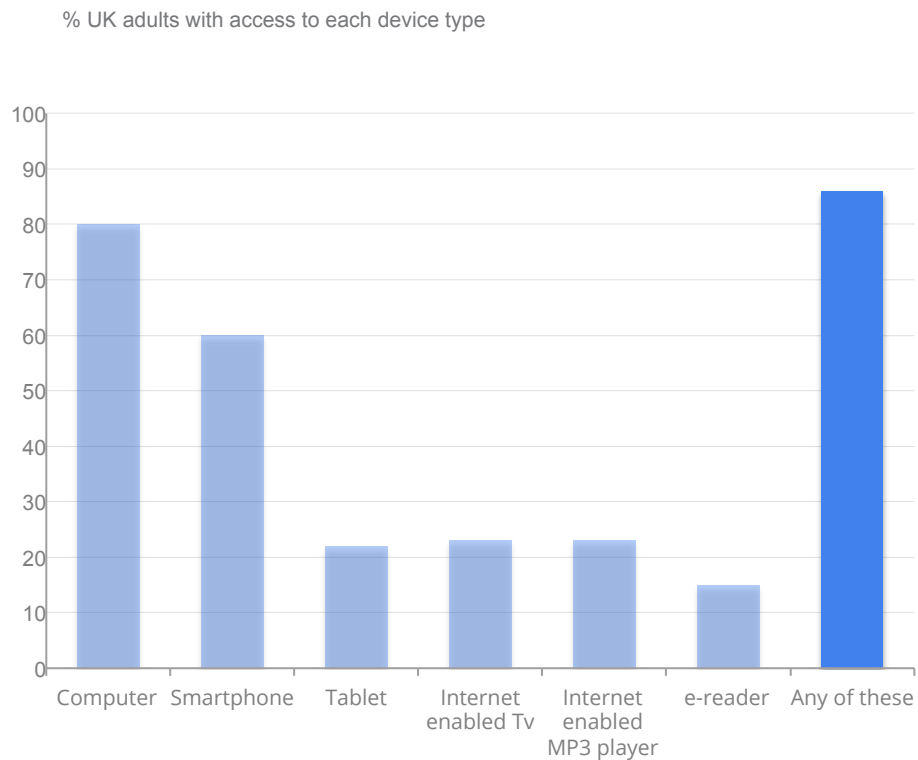
- Aggregate online activity of Olympic Park attendees compared to other locations

Key Findings

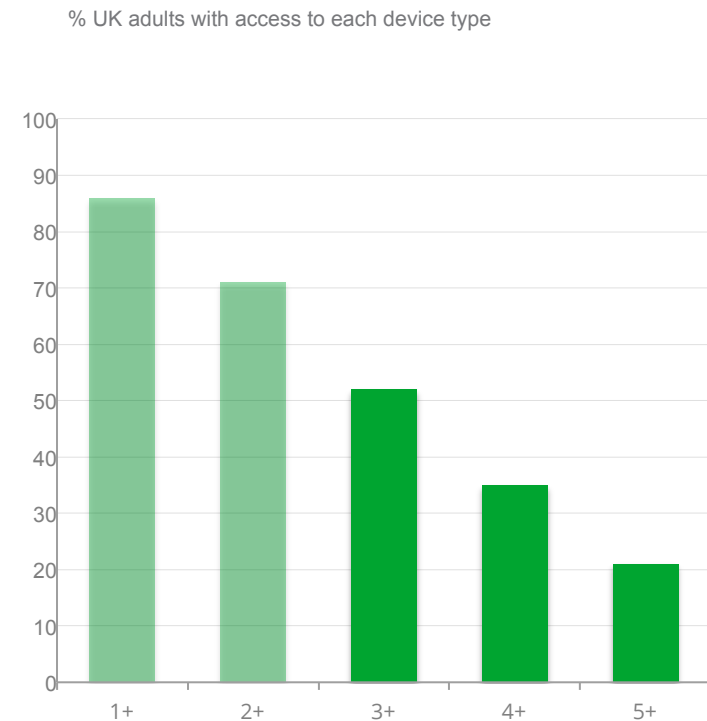
- 1 1 in 3 people followed the Olympics on multiple screens on any given day
- 2 Smartphones extend event engagement – in home & out of home
- 3 The Olympics caused people to try new things in particular on phones, tablets
- 4 50% of spectators contributed to the Olympics' digital afterlife by sharing photos and videos online

Proliferation of connected devices in the UK

UK adults have access to multiple types of connected device



UK adults had access to an average of 2.9 devices for going online



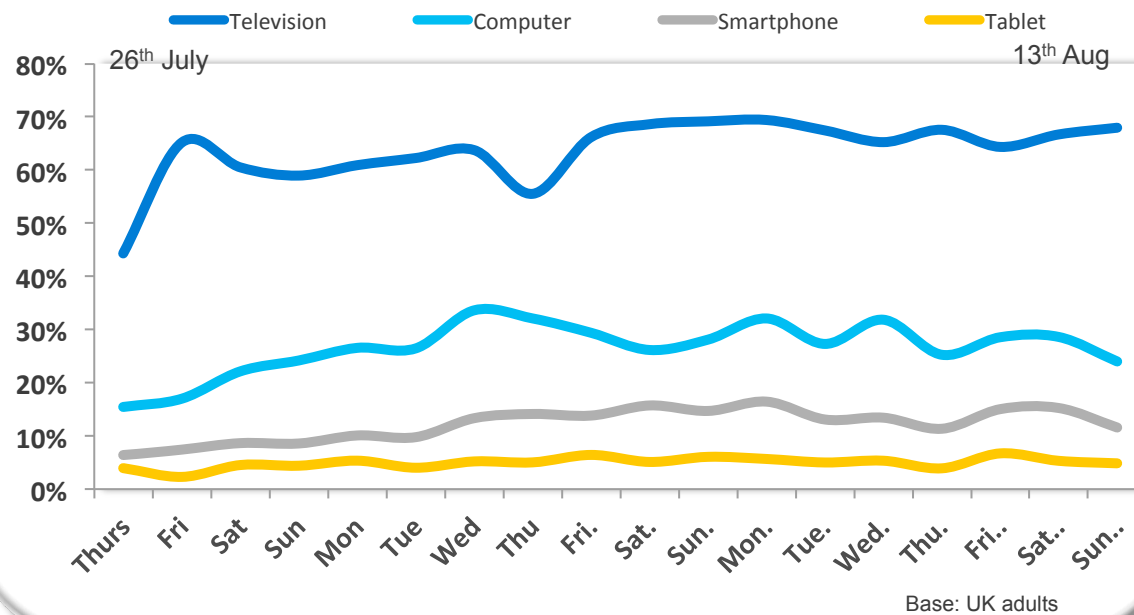
Source: TNS global connected devices usage study, October 2012

TV still the high reach medium but other screens feature strongly



© [CC/BY/2.0] Gary Bembridge, 2012

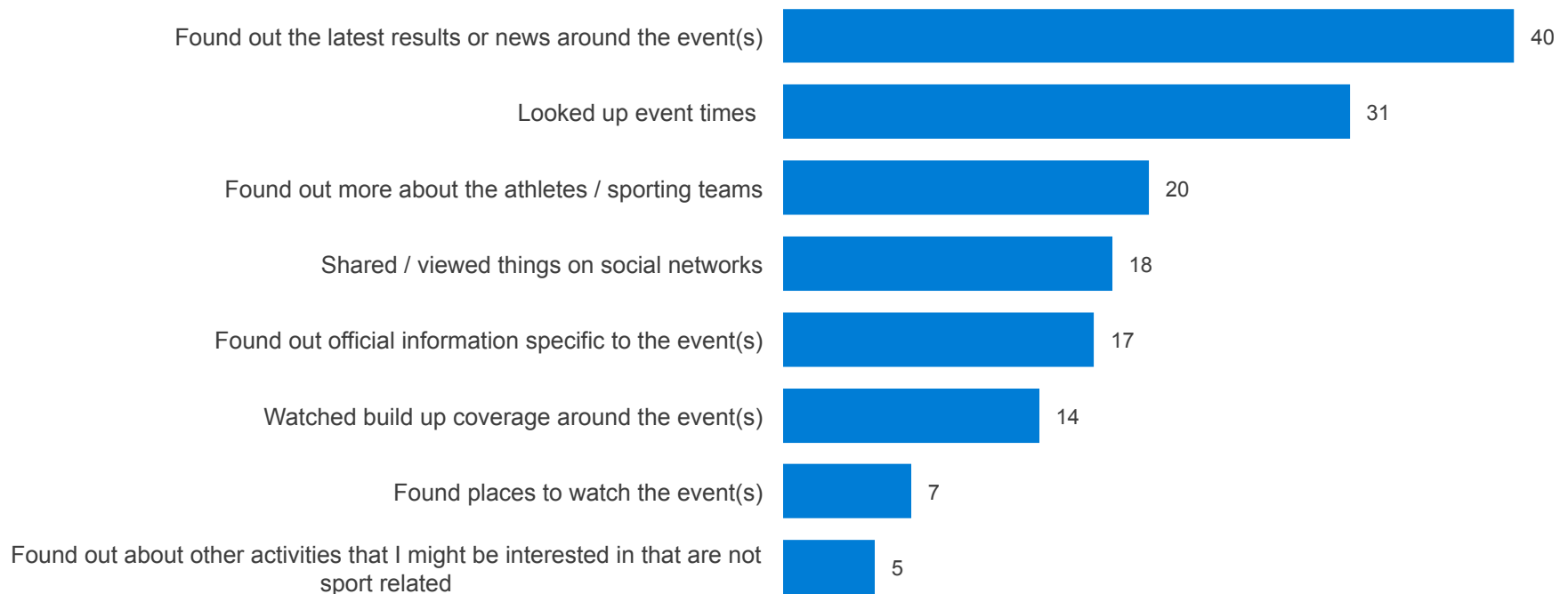
% followed Olympics that day via each screen



Source: YouGov UK Omnibus, August 2012

The Olympics was an information-fest

% doing various Olympic related online activities 4th / 5th August



Base: UK adults with Internet access

Source: YouGov UK Omnibus, August 2012

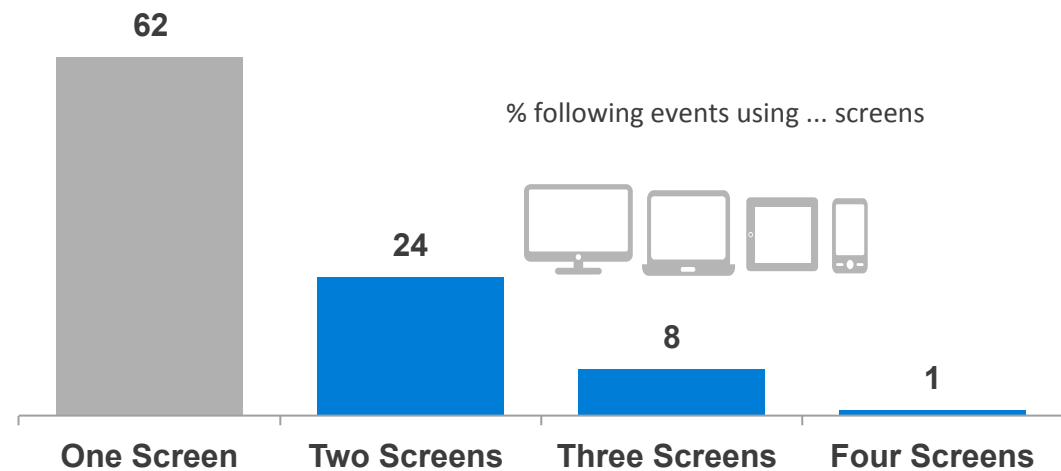
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1 in 3 Olympics followers used more than 1 screen in a day



© [CC/ BY/2.0] Ian Patterson, 2012

Number of screens used to follow a day's Olympics

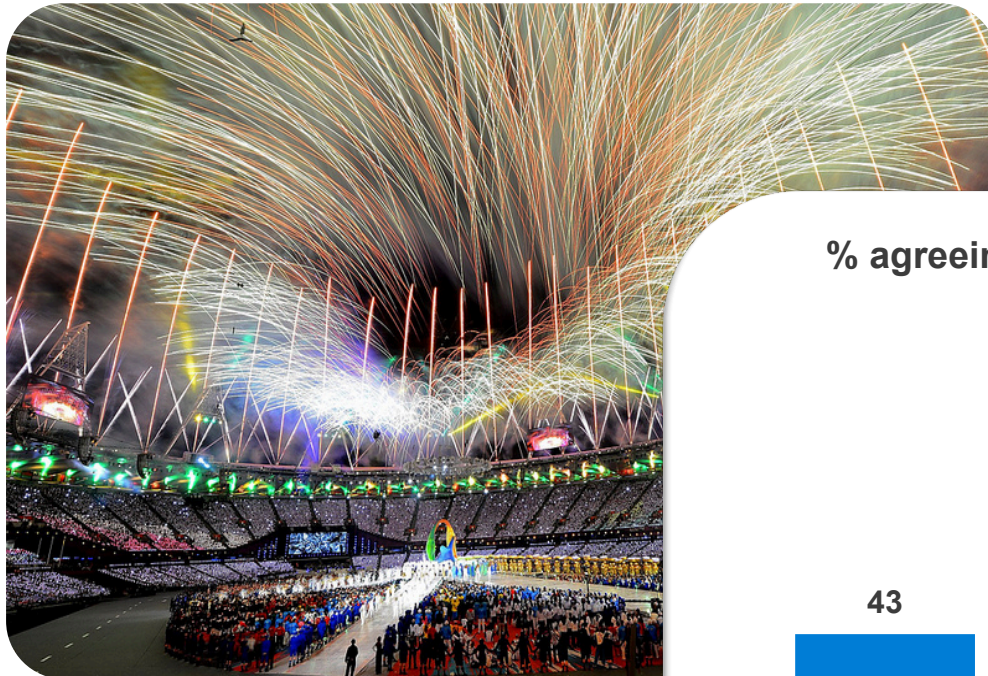


Base: UK adults

Source: YouGov UK Omnibus, August 2012

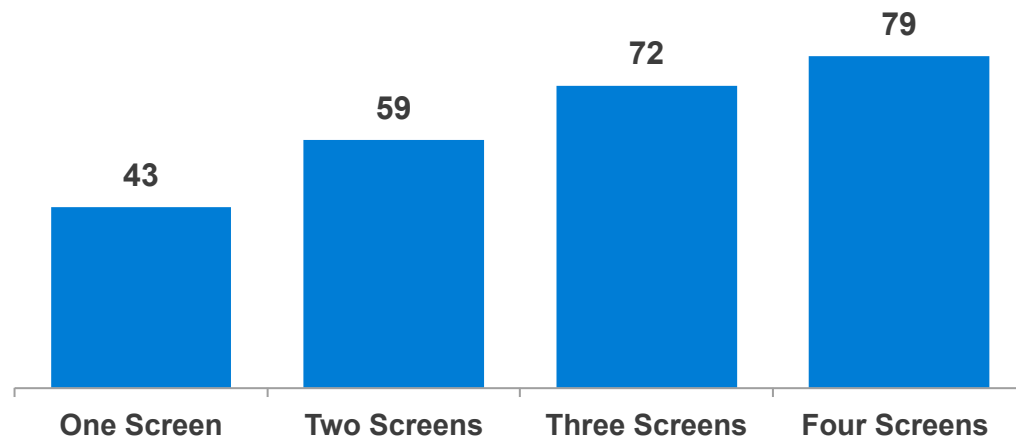
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More enthusiastic people use more screens



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% agreeing: I am excited about the Olympics



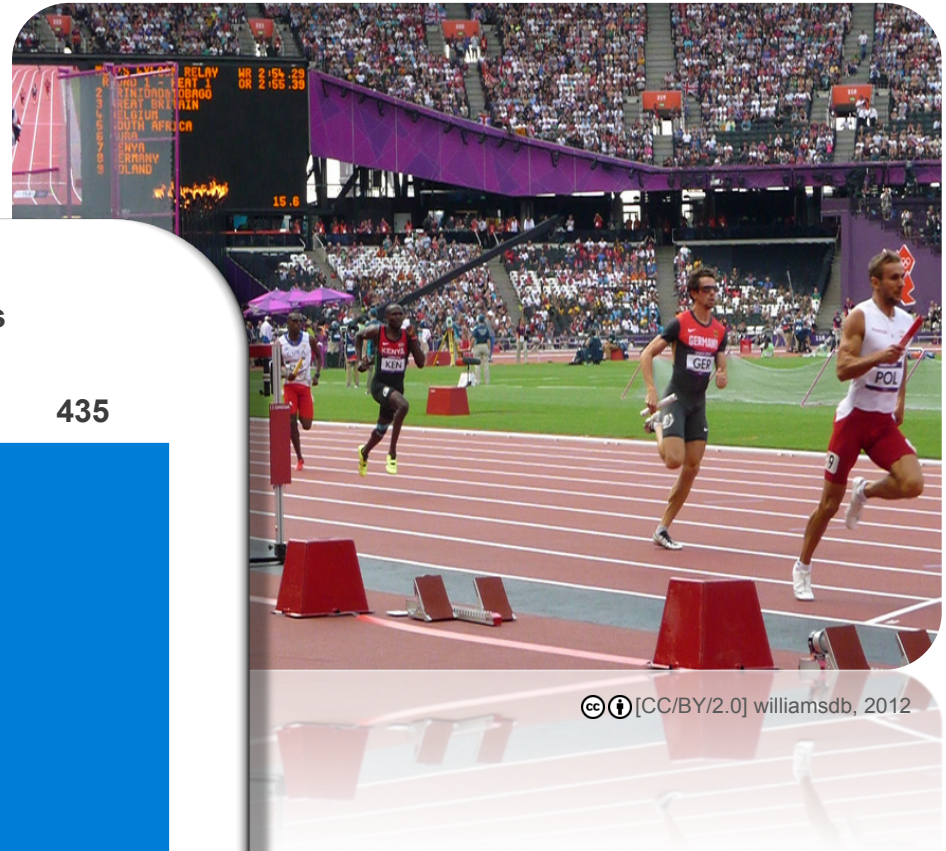
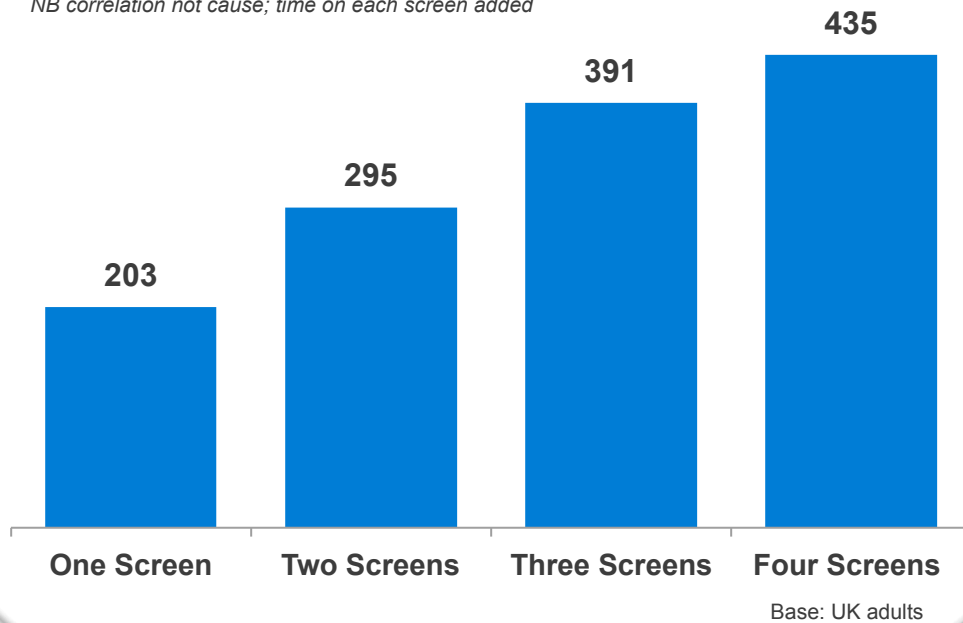
Base: UK adults using ... screens (TV, computer, tablet, smartphone) to follow the Olympics the previous day

Source: YouGov UK Omnibus, August 2012

More screens = more time following the Olympics

Average time spent following per day in minutes

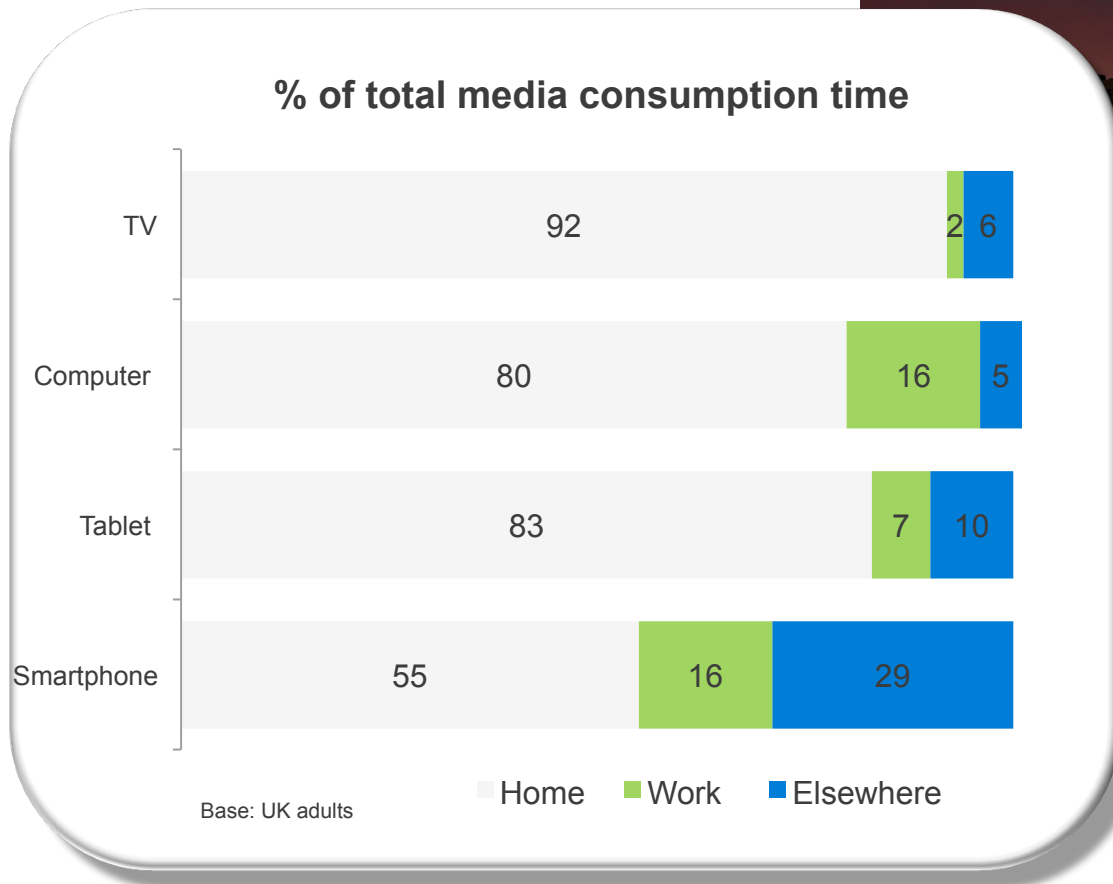
NB correlation not cause; time on each screen added



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Source: YouGov UK Omnibus, August 2012

More screens = more places to follow events



CC BY [CC/BY/2.0] iwillbetimesoon, 2012

Source: YouGov UK Omnibus, August 2012

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Smartphones aid three flavours of multi-tasking



How smartphones were used to follow the Olympics on 5th August

Following same event on
phone + other way

11%

Following two events – one on
phone, one another way

14%

Following Olympics on the phone
while doing something unrelated

10%



Base: UK adults with smartphones

Source: YouGov UK Omnibus, August 2012

At the Olympic Park, spectators followed the Games on their smartphones

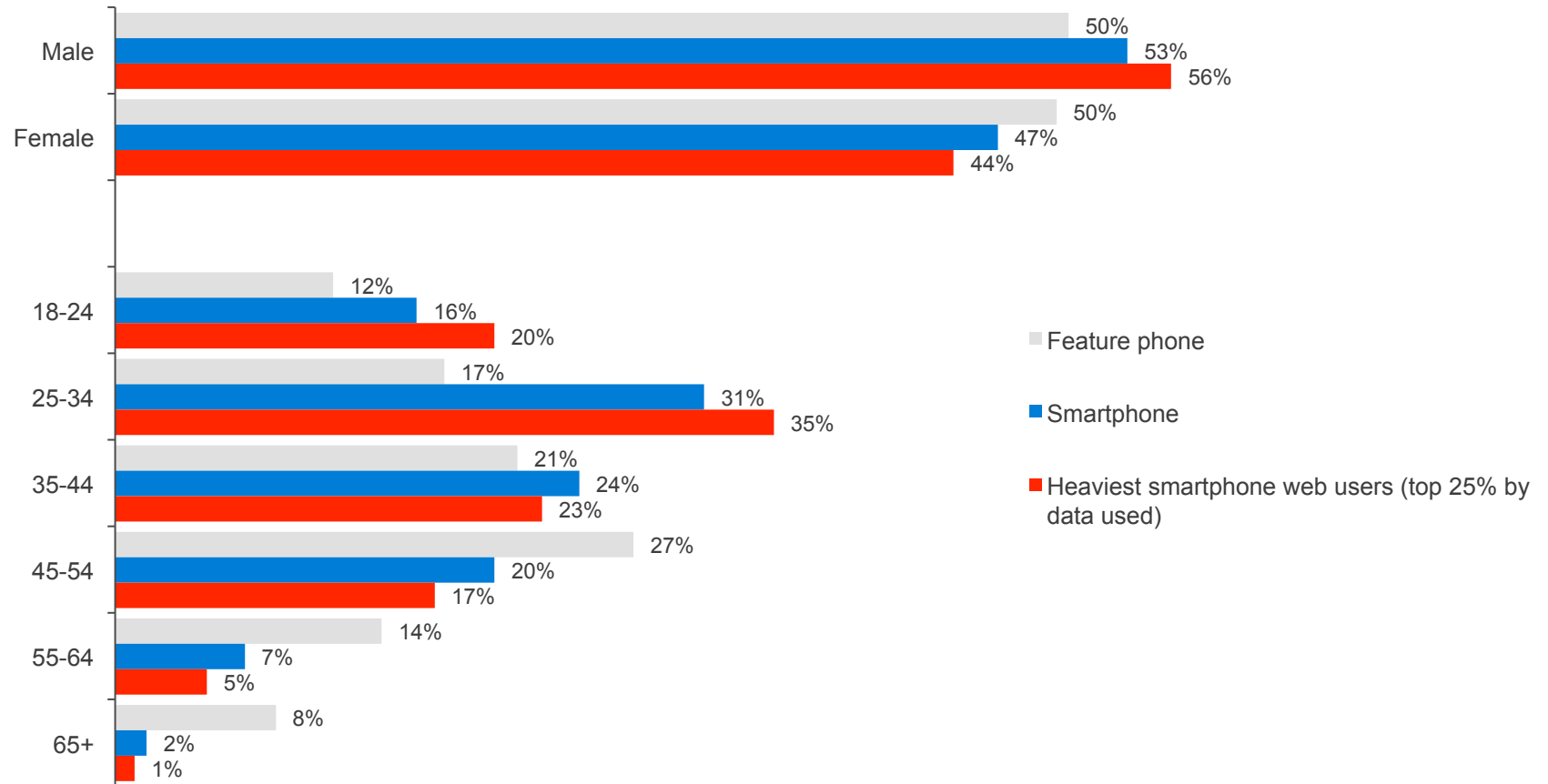
	Olympic Park visitors	Same people on the previous Saturday
% going online:	29%	11%
No. of domains visited:	3.2	2.5
Sports / news sites reach:	41%	32%

NB mobile network usage tracked after making / receiving call/text in defined location:
Median measurement period 3.2 hours at Olympic Park

Source: Ipsos / EE mData mobile network
traffic analysis, July / August 2012

Smartphone web users in Olympic Park skew younger, male

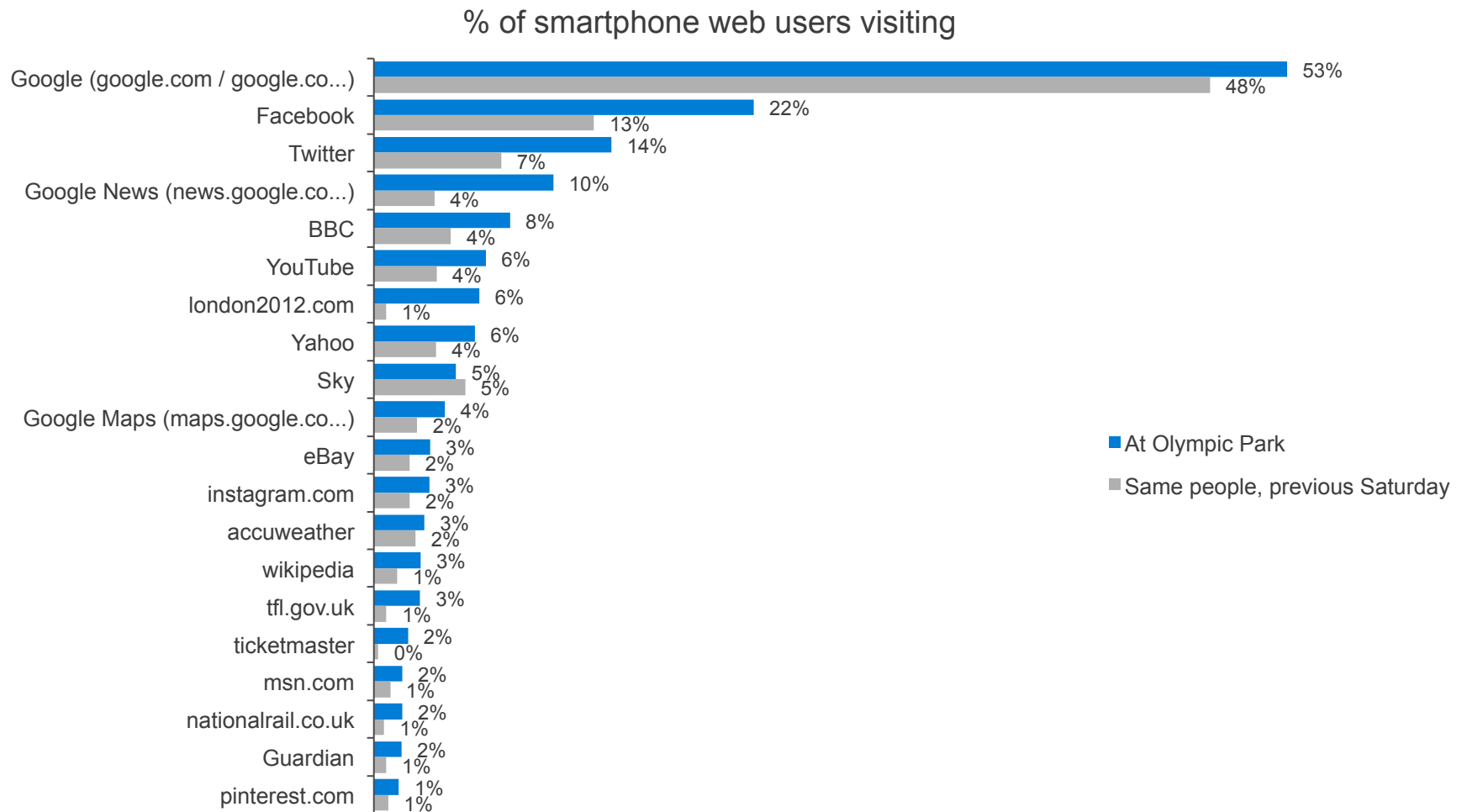
Distribution of phone user visitors Olympic Park by gender & age



Base: EE (Orange) customers who logged call/text in Olympic Park during Games & age/gender known

Source: Ipsos / EE mData mobile network traffic analysis, July / August 2012

Top domains visited in the Olympic Park

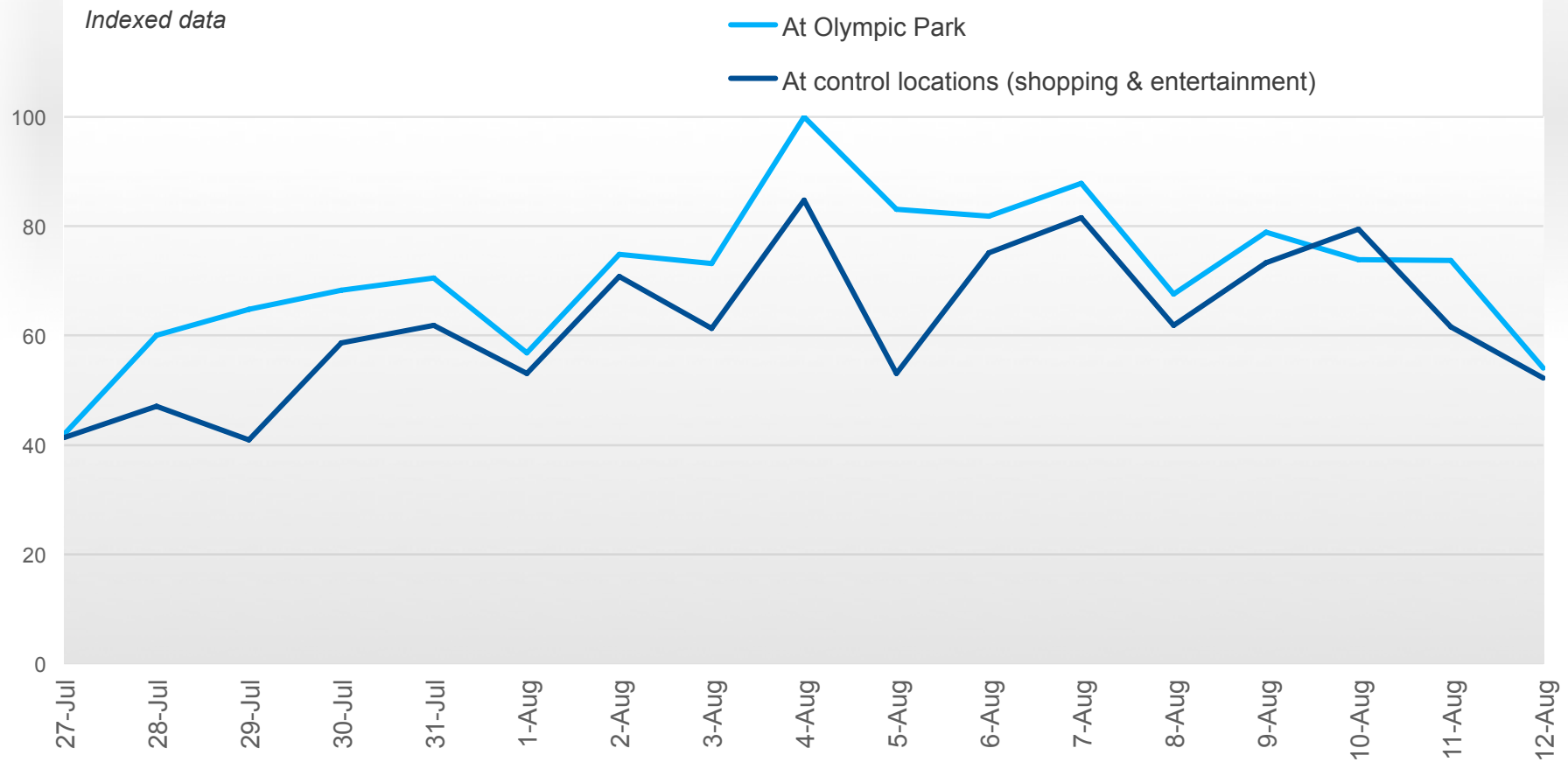


Base: EE (Orange) customers with smartphones who visited Olympic Park during 2012 Games

Domain list excludes domains identified as homescreens, app stores, email & messaging and ad serving / tracking and other background activity, reach based on anyone visiting any classified domain (1476 eligible domains were classified)

Park visitors more likely to check out sports content on phones

Sports category visitors (on smartphone)



Control locations:

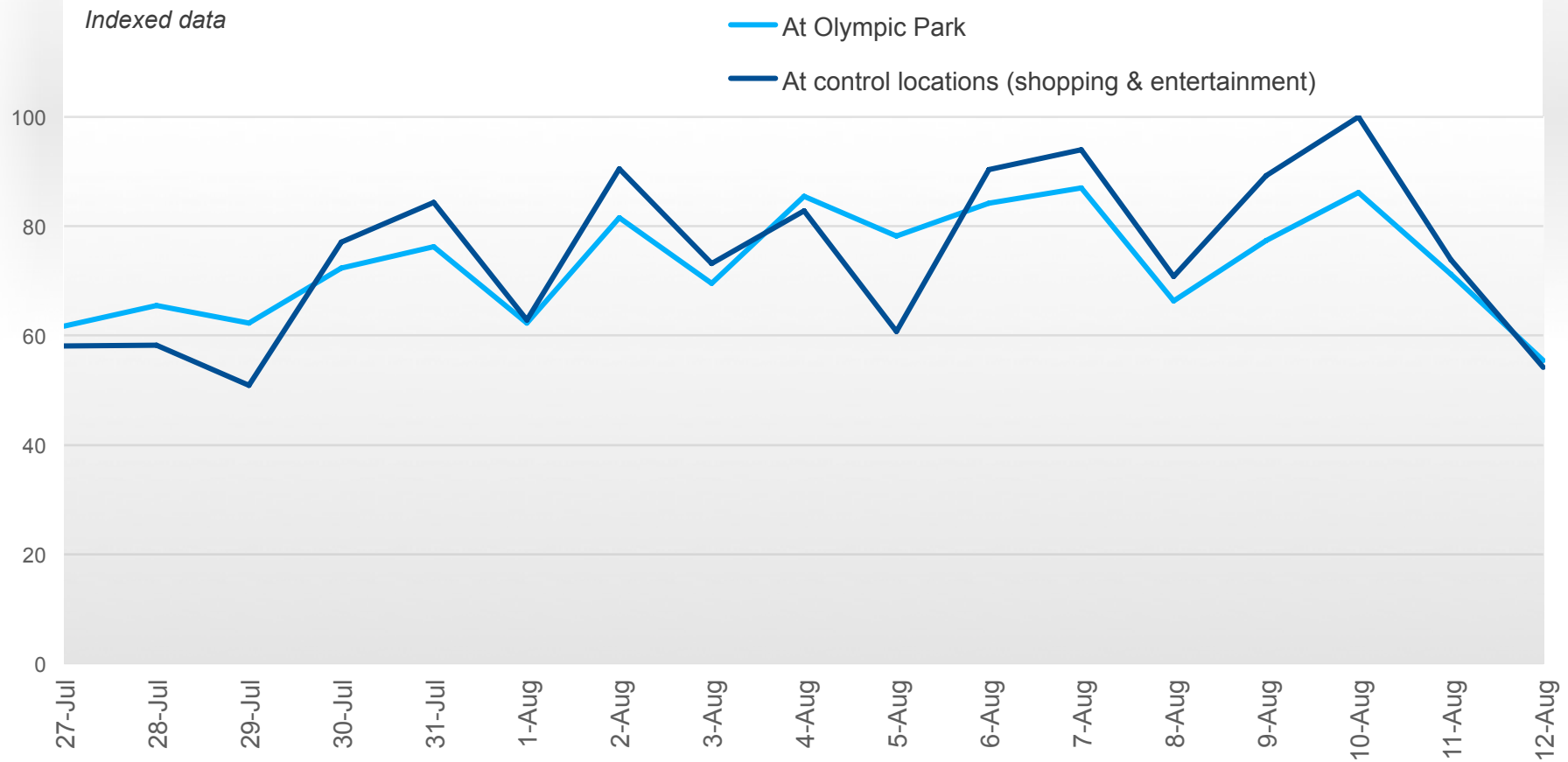
Westfield Shepherds Bush (London - shopping mall); Oxford Circus (London - city centre shopping);

Camden (London - shopping and entertainment); Thorpe Park (theme park near London)

Source: Ipsos / EE UK smartphone activity analysis, 2012

News category usage is similar in the Olympic Park and other outdoor locations

News category visitors (on smartphone)



Control locations:

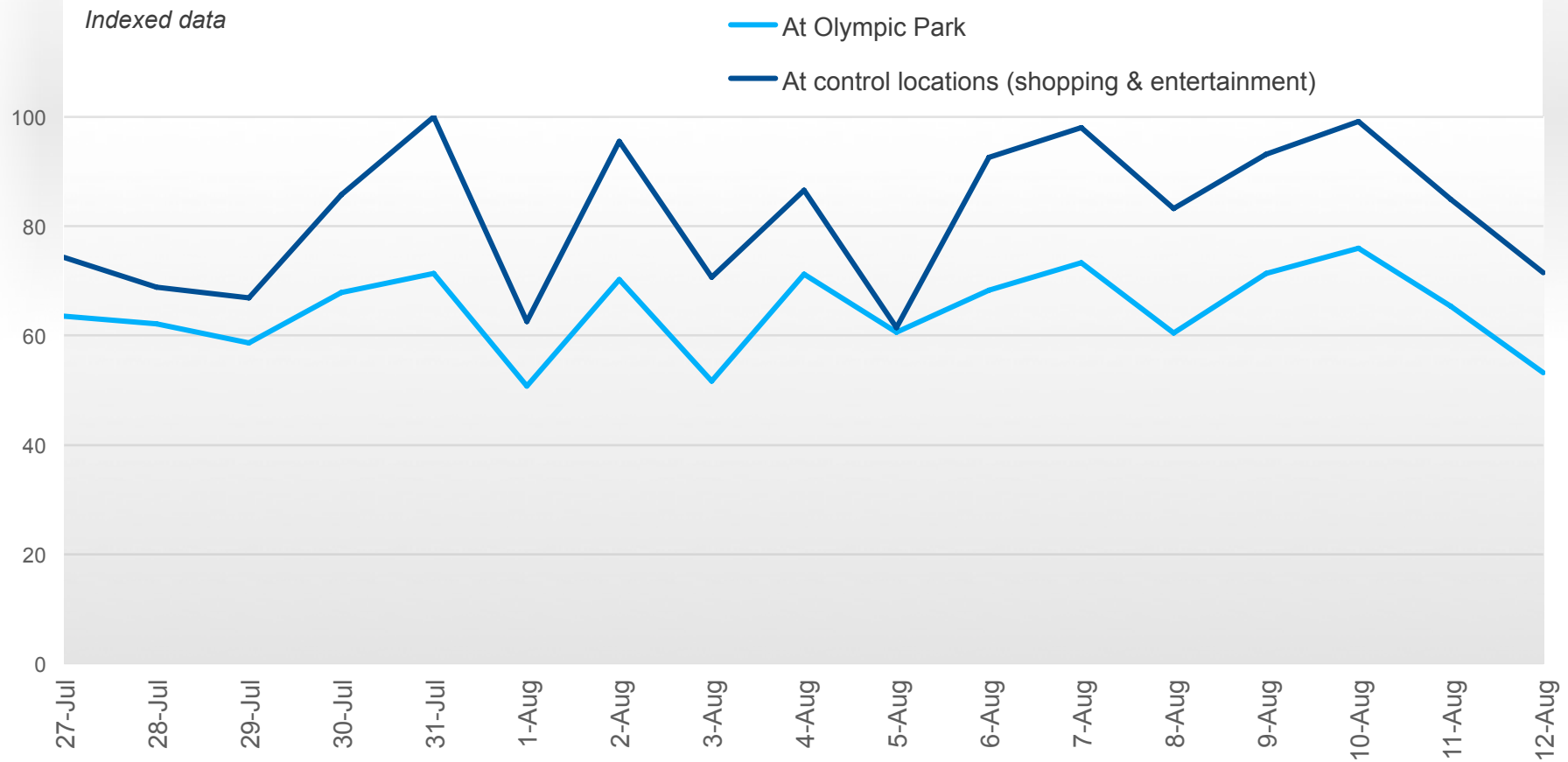
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Source: Ipsos / EE UK smartphone activity analysis, 2012

Smartphone users less likely to watch video inside the Park – where they are focused on live action

Online video category visitors (on smartphone)



Control locations:

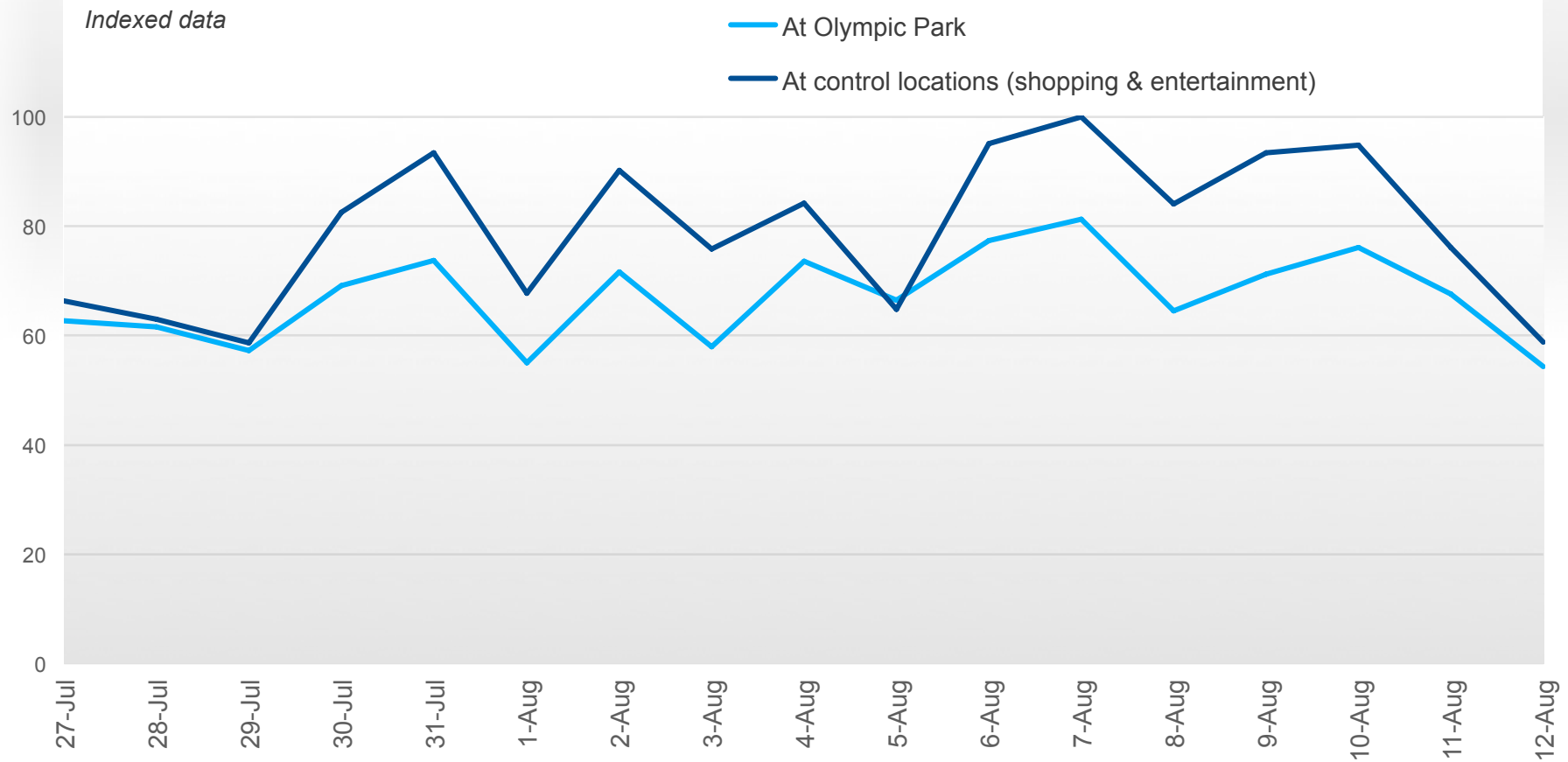
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Source: Ipsos / EE UK smartphone activity analysis, 2012

Overall, social networking more likely while out and about than those in the Olympic Park

Social networks category visitors (on smartphone)



Control locations:

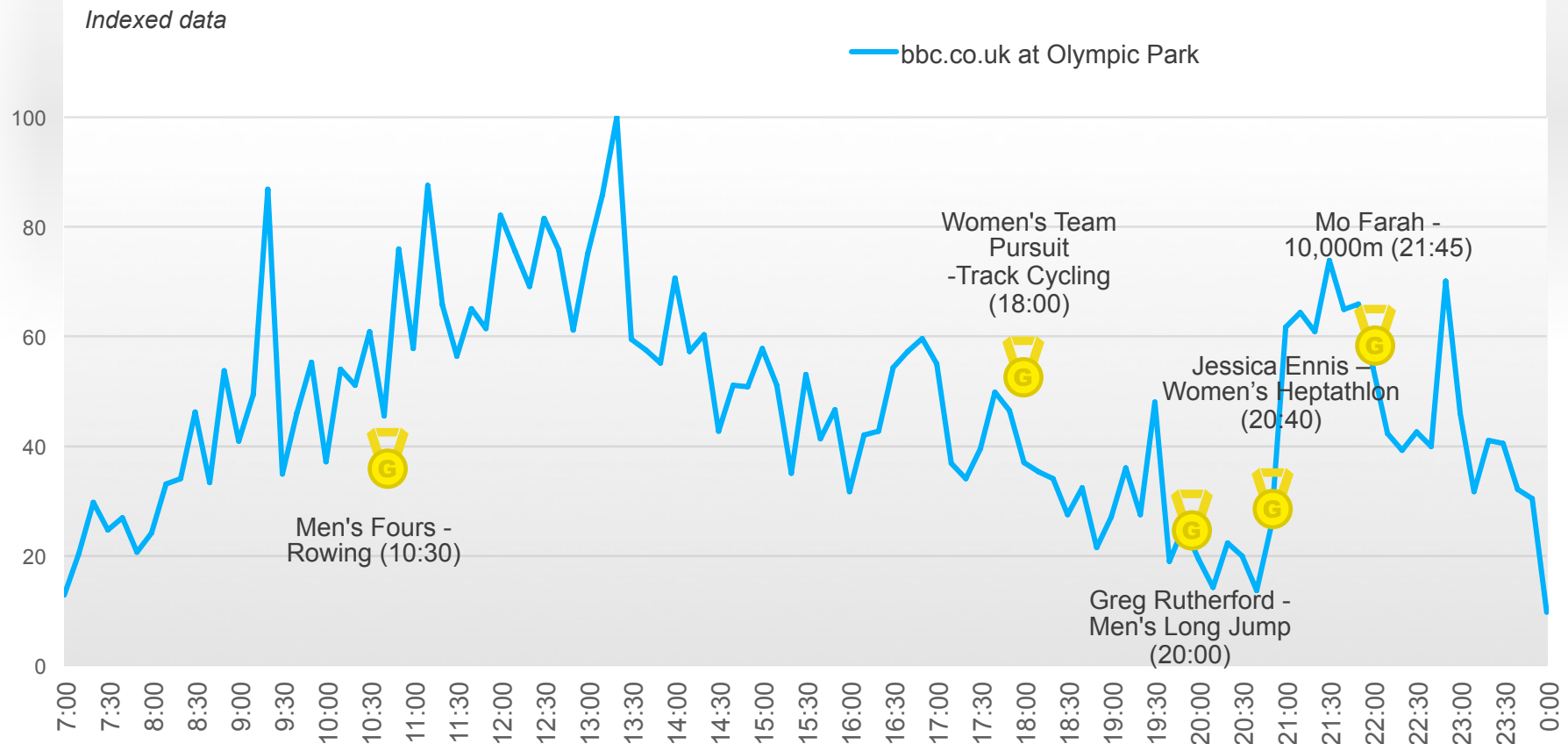
Westfield Shepherds Bush (London - shopping mall); Oxford Circus (London - city centre shopping);

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Source: Ipsos / EE UK smartphone activity analysis, 2012

Big peak in BBC mobile web activity among Park visitors shortly after Jessica Ennis' medal

Smartphone visitors to bbc.co.uk at Olympic Park during 4th August 2012



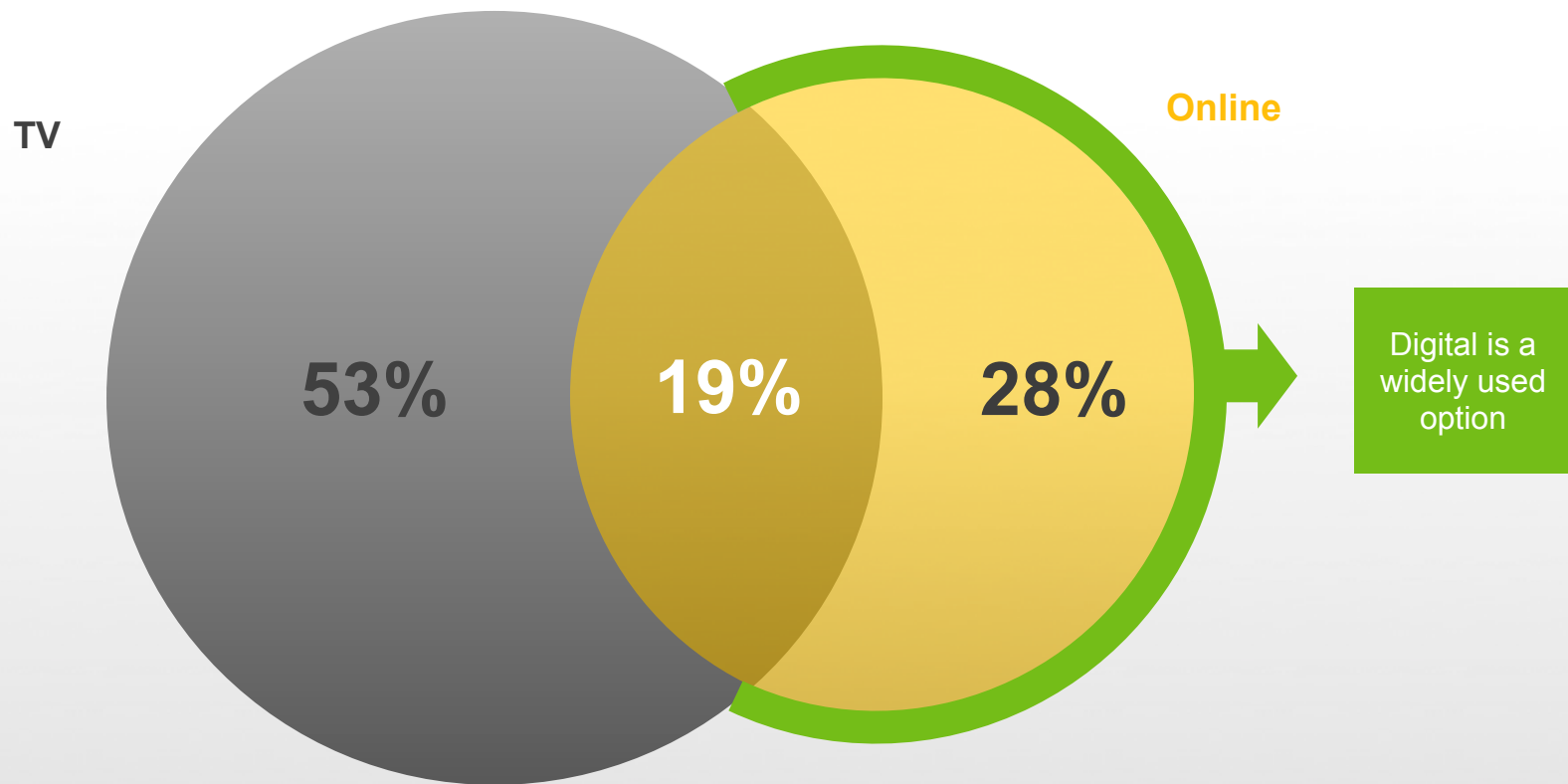
Source: Ipsos / EE UK smartphone activity analysis, 2012



= British Gold Medal

Before the Games began – before TV offered 24/7 coverage – digital screens plugged the gap

Build-up coverage viewing (% watching build-up coverage via medium)



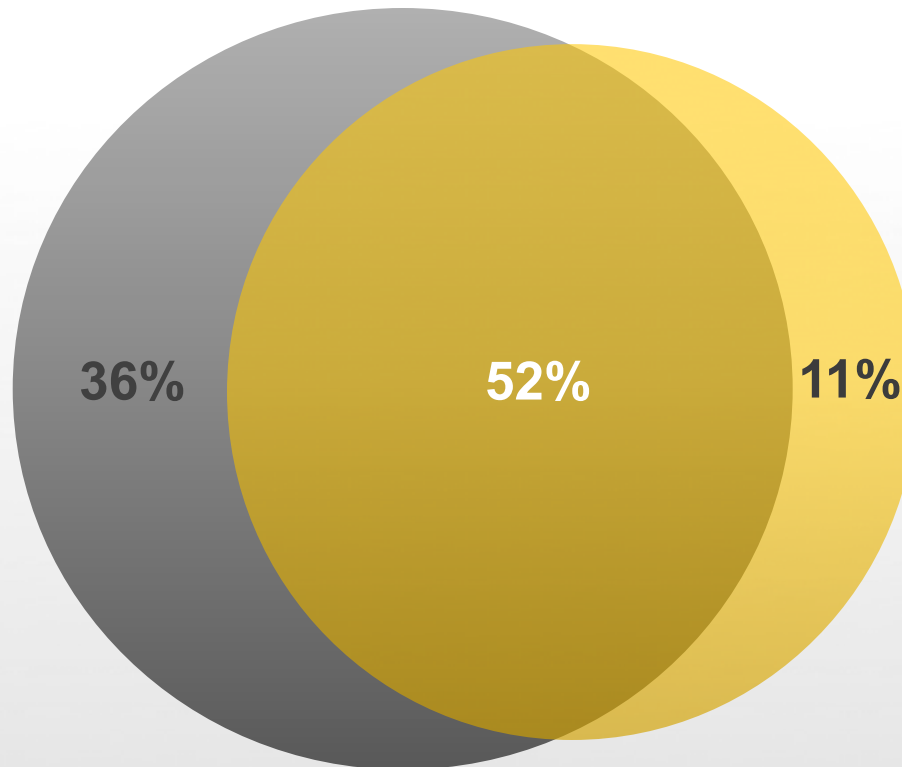
Source: Sparkler – Olympics UK mobile diary study, August 2012

During the games, strong overlap between TV and digital devices

% diary entries including various devices to follow Olympics

TV

Digital devices



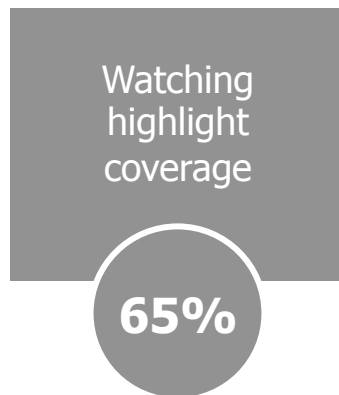
Source: Sparkler – Olympics UK mobile diary study, August 2012

Base: all diary-entries (n=6263)

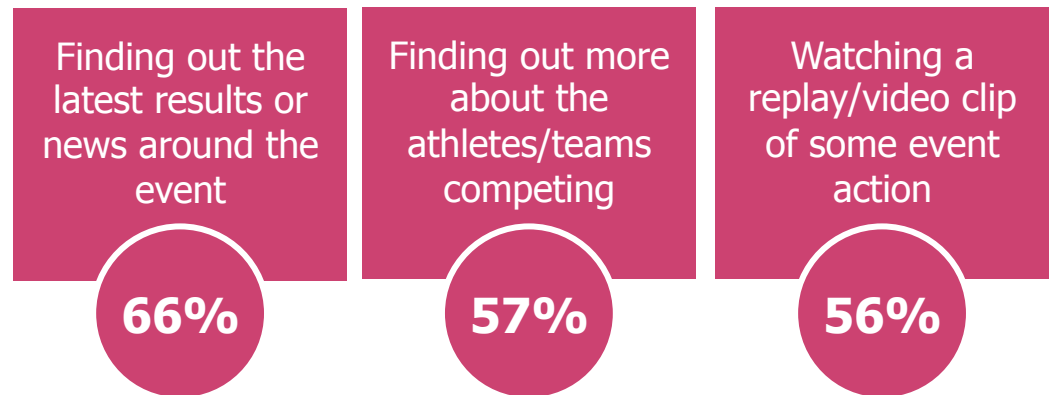
TV & digital screens complement each other

Top activities which **improved the experience** of the Olympics

'Traditional' viewing is important



But also important are the 'extras' that digital screens are best at



Source: Sparkler – Olympics UK mobile diary study, August 2012

Which of the following activities would you say made the Games a better experience for you?
Base: all respondents (n=585)

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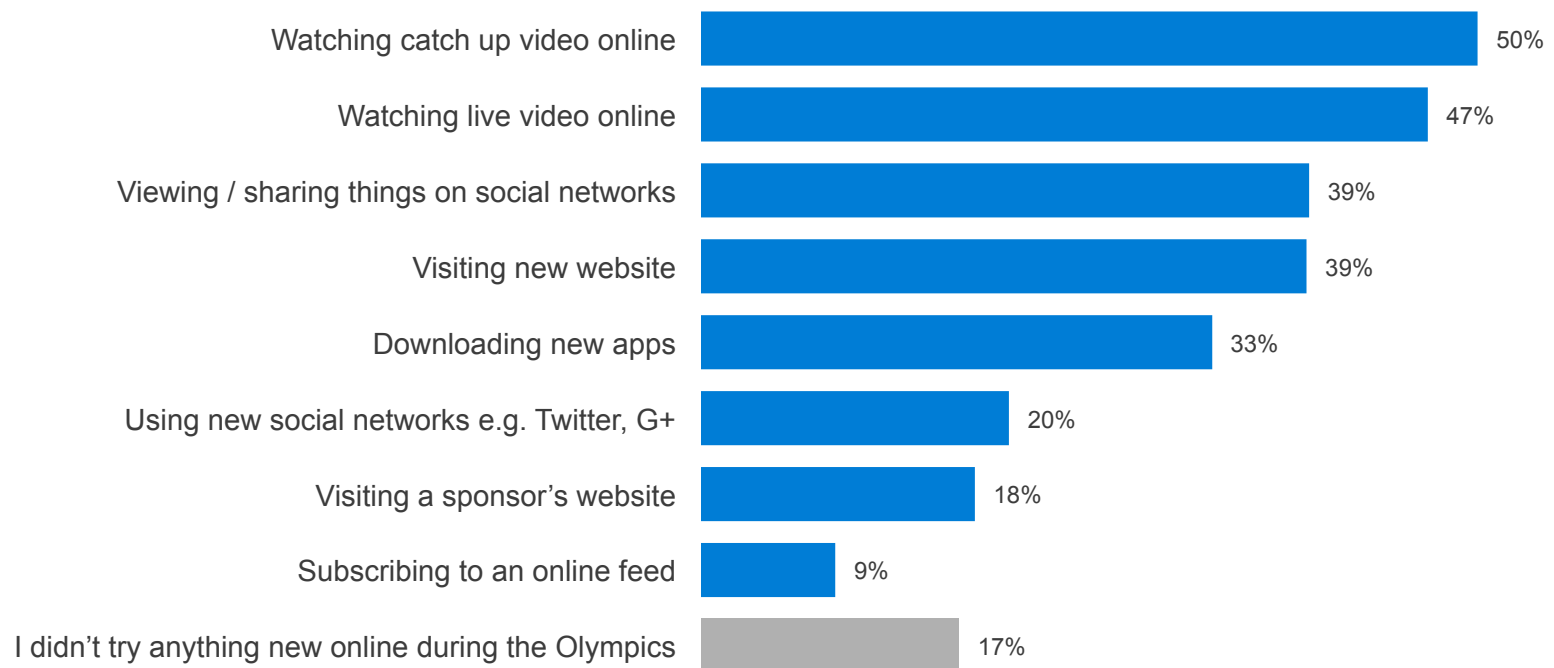
50% of spectators shared photos / videos after the event



Source: Sparkler – Olympics UK mobile diary study, August 2012

Great content drives digital behaviour change

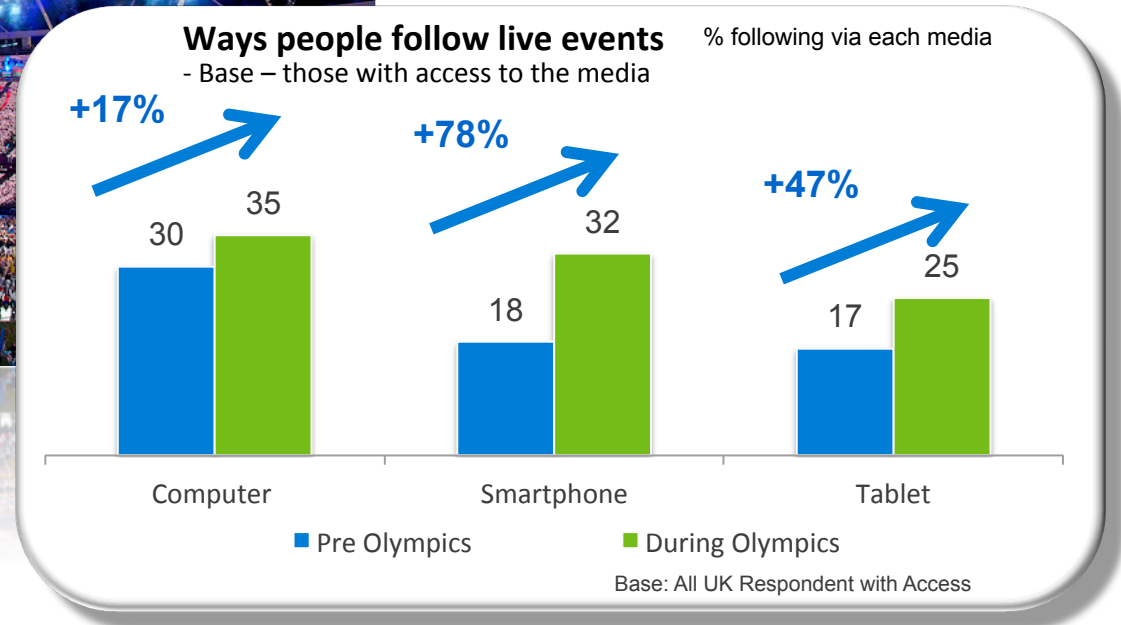
Which of these activities did you **try (for the first time) or do more** of during the Olympics?



Base: UK smartphone web using Olympic enthusiasts

Source: Sparkler – Olympics UK mobile diary study, August 2012

New devices benefit disproportionately from people trying new things to follow the Olympics



Source: YouGov UK Omnibus, August 2012

Key Findings

- 1 1 in 3 people followed the Olympics on multiple screens on any given day
- 2 Smartphones extend event engagement – in home & out of home
- 3 The Olympics caused people to try new things in particular on phones, tablets
- 4 50% of spectators contributed to the Olympics' digital afterlife by sharing photos and videos online

Appendix

Primary research methodology details

Device ownership & usage study methodology

- **TNS** ran a random digital dialling (fixed line & mobile) phone based survey in October 2012 on behalf of Google
- 2000 interviews were completed
- Results weighted and projected to be representative of UK adults (16+)
- The study goal was to establish levels of ownership and usage of various digital and audiovisual devices
- The study was also conducted in a number of other European markets in October, and is refreshed across ~40 countries globally each year

Olympics Omnibus study methodology

- **YouGov** fields a daily nationally representative Online Omnibus survey of 1500+ adults aged 18+
- Google inserted a set of media behavior questions before the Olympics (baseline) and every day during the Games. The core of the study is based on a consistent set of questions about how the Olympics in general and specific topical events were followed, with additional one off questions drilling down into online and media usage
- Questions were finalized in the morning for issuing in the afternoon to keep them as topical as possible
- Total sample size for surveys on 20-23 July and 27-13 August was **30238**

Ipsos / EE mobile network usage analysis methodology

- Near census scale data set of online activity on mobile network of EE customer base filtered according to defined business logic (eg restrict by location, time, OS, customer attributes etc.)
 - EE has approx 35% share of mobile phones in UK
 - Data based on Orange customers only (not T-Mobile)
- Online activity analysis limited to domain level during pilot phase of Ipsos / EE research partnership
- Aggregate outputs with minimum threshold of customers per observation – not user level data
- Focus on quantifying mobile web usage in terms of overall use, domain & category reach, time of day and volume of usage.

Ipsos / EE mobile network usage – data definitions

Location

- Detected when making receiving call / text within pre-defined areas as defined by bearing & distance from relevant mobile network cell masts

Time

- Data analyzed 30 mins either side of location observation, unless a different location is observed

Frequency

- Remove from sample where same customer is observed more than twice in the analysis period (to focus analysis on visitors and exclude local workers, residents, athletes, volunteers etc.)

Mobile OS

- Focus of analysis is on smartphone usage. Feature phones removed. Blackberry OS removed as well due to technical limitations in reading web traffic data

Olympic enthusiast diary study methodology

- Sparkler recruited a sample of digitally ready Olympic enthusiasts (all “excited about the Olympics” and keen to follow the action). The sample were all smartphone web users, 32% already owned a tablet; 53% considered themselves technologically advanced
- Sample design aimed to support in depth study of early adopter behavior patterns, complementing the nationally representative YouGov study.
- Three respondent segments:
 - supporters of 8 specific events (n=259)
 - planning to watch 100m final (n=124)
 - had event tickets (n=202)
- Research approach:
 - Media benchmark survey (pre-Olympics)
 - Smartphone diary app (regular check-ins on Olympic following activity)
 - Post-event survey
 - Post Games survey



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