



SECOND SCREEN RESEARCH:

“THE WHITE SPACE”

octa8on

WHAT OCTAGON KNOWS ABOUT SECOND SCREEN AUDIENCE BEHAVIOUR AND HOW THAT CAN HELP BRANDS ENGAGE WITH FANS THROUGH SPORT



76%

of adults have used a second screen in the past year while watching a sports match on TV. This compares to 62% in 2011, an increase of 14% in just 2 years from when we last commissioned research on this topic.



1.038

billion smart phones in use worldwide in 2012 compared to 708 million in 2011. That's a 46.6% growth rate in a year.¹



94%

of people are watching sport live versus time shifted viewing.²



1500%

increase in discussion around the Budweiser brand following ads run during the Olympic Games in the US market.³

The mass adoption of second screen devices has changed how we engage in sport. Understanding this new landscape is critical for brands seeking to maximise their return on investment in sport. Ahead you'll find the 6 key take outs from our research.

1. Strategy Analytics
2. The Shift in 'Time Shifted' Viewing, Rob Bienes (Discovery Communications)
3. Associated Press: Are You Adapting?

1. THE TV AS SECOND SCREEN: WHO'S DRIVING WHO?



The term **second screen** evolved to describe the computer or mobile device. The accompanying assumption is that the first screen is television. However, the terms can be misleading.

As a consequence of people spending more time online, social media is driving people to live sport. For these people, **television is the second screen**.

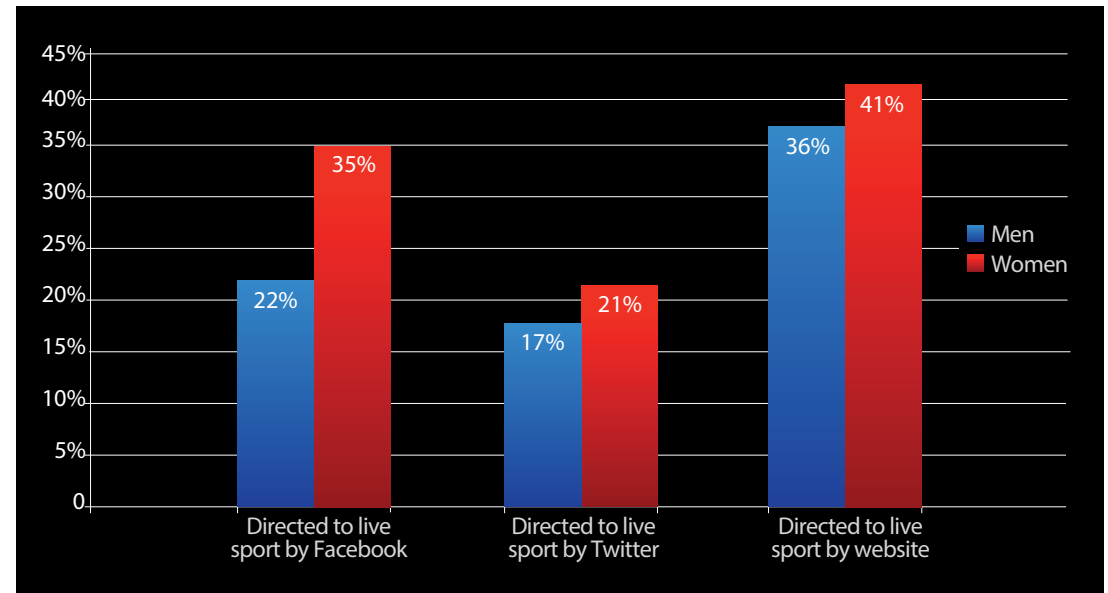
Young males and females (18-34) are almost twice as likely to be using social media channels than their elder counterparts.

What's more surprising is how online resources and communities are driving people to watch live sport programming.

Our survey identified that **38% of adults have turned on to live sports programming due to something they have read online in general**. 28% have turned live sport on due to Facebook and 19% have done so because of Twitter. We suspect the Twitter number is lower simply due to the fact that the number of UK users of Twitter (26%) is lower than the number of Facebook users (56%).⁴

This trend is further evidence of the how live sport and the online community are increasingly interlinked.

WHICH OF THE FOLLOWING SITES HAVE YOU BEEN REFERRED TO LIVE SPORT FROM IN THE LAST 12 MONTHS?

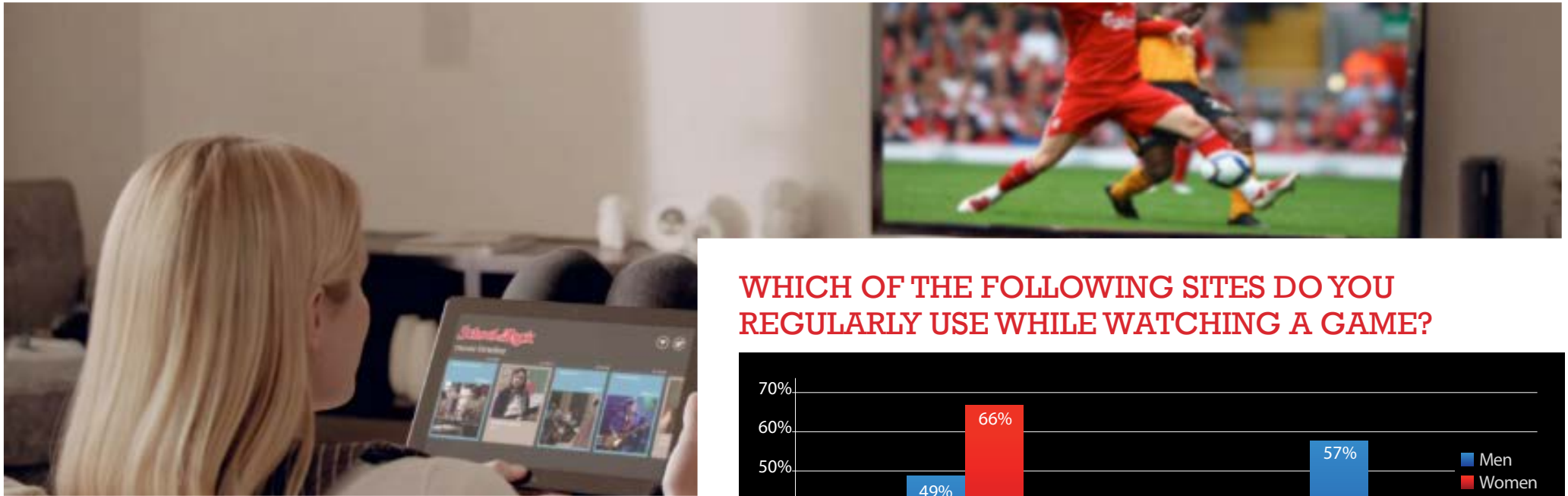


WHERE'S IT GOING? A NEW ERA OF COLLABORATION BETWEEN BRANDS AND RIGHTS HOLDERS?

This insight has implications for brands. It highlights the importance of generating conversation around sport events that they are involved in order to broaden reach. There are mutual benefits for the brands and the rights holder involved in driving a larger viewing audience. This could be a key area for collaboration to maximise potential reach, especially for those involved with lower profile sports.

⁴ Kantar, October 2013

2. WHAT WOMEN DO DURING THE GAME



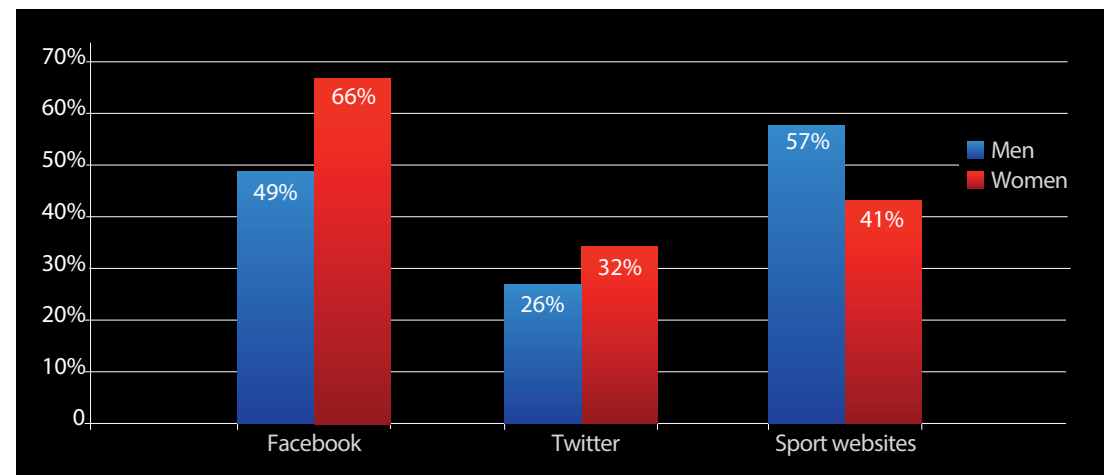
Sponsorship of women's elite sport in the UK makes up less than 1% of the total market compared to 61.1% for men's sport over the same period, according to the Women's Sport and Fitness Foundation.

These figures reflect the old media driven model of sponsorship that chases broadcast eyeballs delivered in the main by live mega events and football.

But insights derived from our research in to second screen audience behaviour tells a different story - interestingly, the way men and women use second screen devices while watching sport differs.

Whilst men are more likely to be using their devices for purposes related to the action, women are more likely to be engaged in activities that are removed from the sport they are consuming.

WHICH OF THE FOLLOWING SITES DO YOU REGULARLY USE WHILE WATCHING A GAME?



So where are they going? To social media of course. **Women view Facebook as the undoubted champion for second screen usage during sport.** The sports they second screen around also differ. **Women are noticeably more likely to be second screening around Athletics and Tennis than men.**

Points of differentiation such as this start to build a picture, and clever sponsors can use these findings to reach the greatest white space in the sports marketing industry: young women.

3. THE FUTURE OF PUNDITRY: SECOND SCREEN HEROES

A key trend in sports media is the development of second screen brands – brands within a brand – that use data and insight to supplement traditional TV sports coverage.

For example, Nate Silver's FiveThirtyEight blog moved from its previous home at the New York Times to ESPN, the Disney owned sports conglomerate. Silver is famous as a political forecaster, using data to correctly predict the outcome of the 2008 and 2012 American elections. Before creating statistical models for elections, Silver was a baseball sabermetrician, who built a highly effective system for projecting how players would perform in the future.

Other examples of second screen brands in other spheres such as business and politics include Andrew Ross Sorkin's pioneering DealBook and Ezra Klein's Wonkblog at The Washington Post.

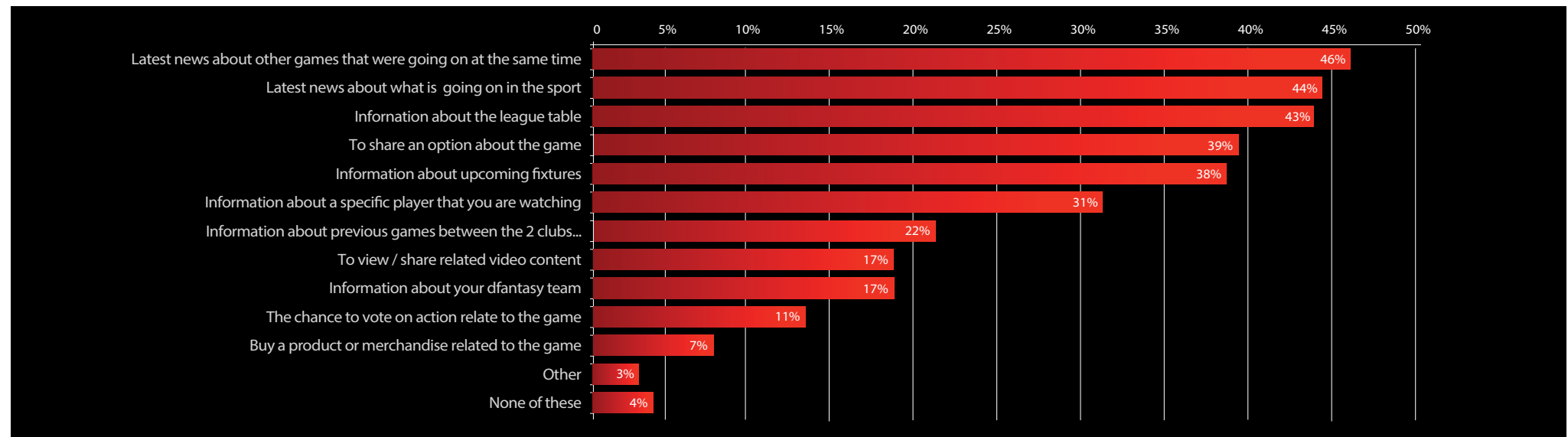
Clearly, the sport viewing experience is no longer a passive one – fans are searching for a wide range of additional information while they are watching sport. Exploring this in more depth, we can identify two clear themes for second screen usage related to the game – a desire for supplementary, real time, information related to the action (live scores, results, statistics etc.) and a willingness to share opinions / seek out the opinions of others.

45% of football fans feel there aren't enough in game football statistics available during a match.⁵ Fans have developed a deeper interest in the sports they follow going far beyond the teams / individuals that they support and, in line with the instantaneous dissemination of data online, are seeking this information to enhance their live viewing experience.

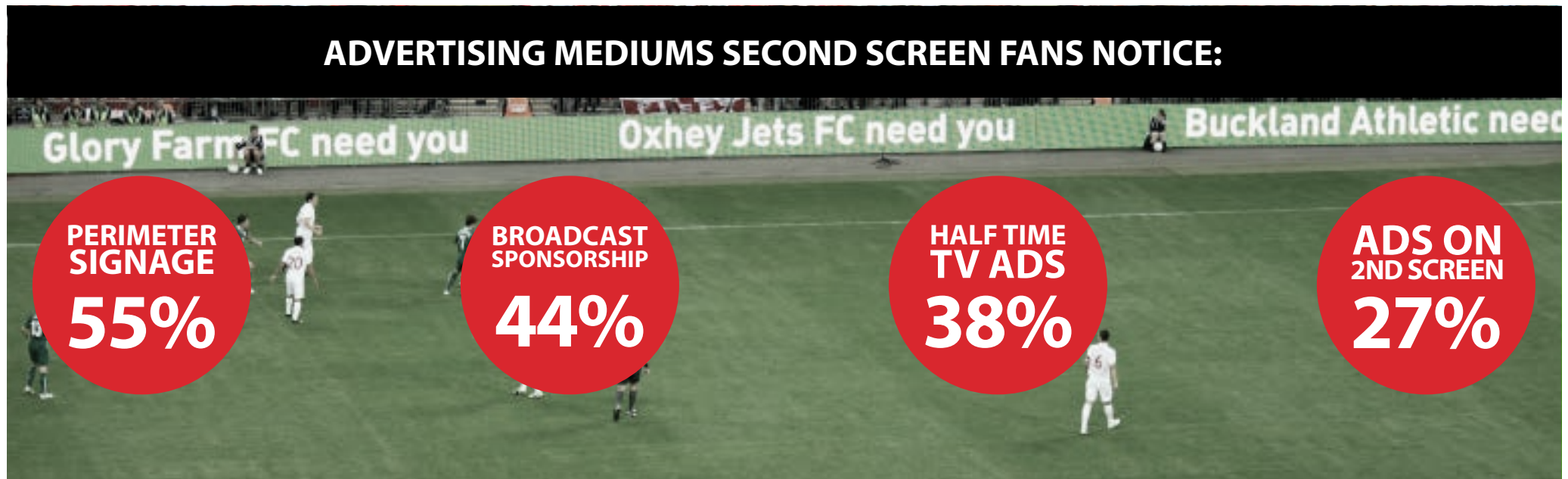


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This is a trend that hasn't gone unnoticed by brands, broadcasters and rights holders who are all vying to be the primary outlet for fans to access this information. For example, the list of partners of Opta, the world's leading sports data company, includes the likes of Sky Sports, BT Sport, Adidas, Nike, Castrol and AIG.



4. PERIMETER BOARD 2.0 HOW THE SECOND SCREEN REINVIGORATED TRADITIONAL SPORT ADVERTISING



The perimeter board has been much maligned over the past few years, derided as a relic of the old school of sponsorship activation.

Not any more. Second screeners have breathed new life into perimeter board advertising.

WHY?

We have identified that 76% of sports fans can be categorised as 'second screeners' – a significant majority. Therefore, a key question for brands is how effective are traditional means of advertising around live sport?

Are fans too distracted to notice advertising mediums such as perimeter signage, broadcast sponsorship and TV advertising targeted during live sport broadcast? Would brands be better advised to target advertising to reach fans through the second screen device?

Our research shows that second screen fans are more likely than single screen fans to recall advertising around the game (72% compared with 58%). With the second screener likely to be a younger adult (18-35) this is good news for brands advertising through sport. So what advertising mediums are most noticed by second screen fans?

Perimeter signage is the most noticed advertising platform by second screeners, with traditional TV

advertising around the sport broadcast also remaining effective.

This important finding shows that traditional sponsorship assets remain a vital mix of an effective campaign despite an increasingly digital fan experience (to the collective sigh of relief of rights holders around the world). Brands should therefore strive to keep an effective balance in the platforms they select to reach fans through sport.

Much in the same way that the rumours of traditional ATL advertising's demise have long been exaggerated, the same is true of sponsorship rights inventory. Professor Bryron Sharp, with his position on the importance of mental and physical availability for brands, would probably agree.⁶

6. Byron Sharp, How Brands Grow

5. THE RHYTHM OF SPORT (AKA THE POLITICS OF THE INTERVAL) WHEN YOU ENGAGE WITH FANS IS JUST AS IMPORTANT AS WHAT YOU SAY

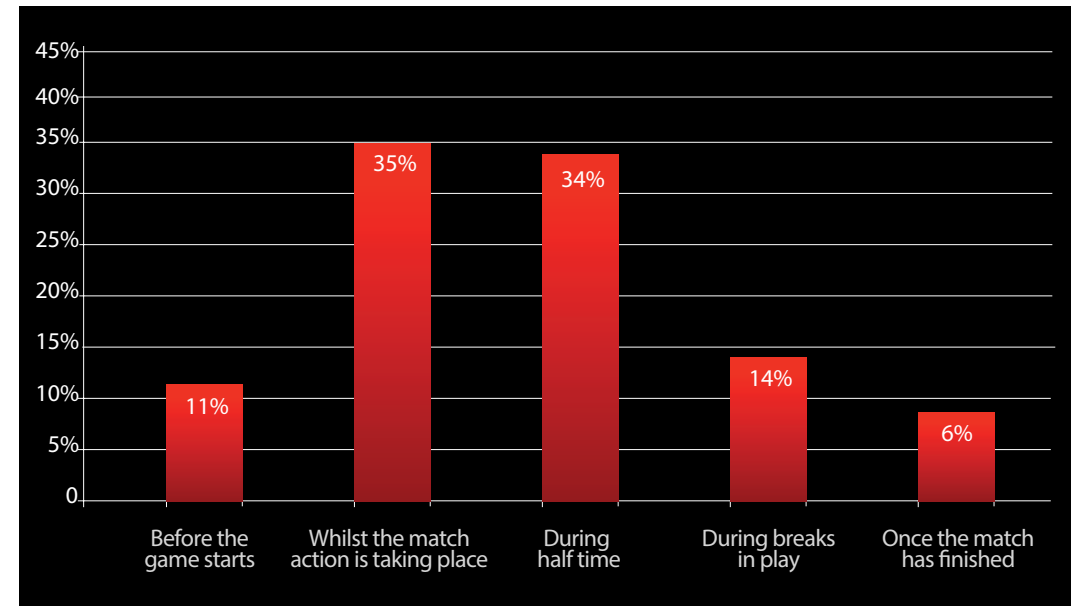


Every sports event has its own rhythm. A day of test cricket is different from an NBA game, which in turn has only marginal relevance to a multi sport mega event such as the Olympic Games.

For brands to effectively connect with second screeners during live sport it is critical to appreciate the right - and wrong - time to engage in conversation, whether this is pre-match, break in play, post-match) or whether they are most likely to be multi-tasking during the action itself. Our research shows that **there are two key times when fans are most likely to be doing the majority of their second screening – during the match itself, and during intervals in play (i.e. half time).**

These two periods present the most effective time to engage with the sports fan via their second screen whilst they are watching a sport live on TV. It also illustrates the importance of brands being able to react to events in real time if they wish to capitalise on the second screen opportunity: **there is very little point in creating great content for second screen post match: only 6% of your audience will be engaged by it.**

WHAT TIME DURING THE GAME /MATCH DO YOU TEND TO USE YOUR SECOND SCREEN THE MOST?



Coupled with the information of the kind of activities they are engaged in, and the platforms with which they interact, brands should be able to gain a good understanding of how to design an engagement strategy relevant to sport fan behaviour. A great example of this is SKY Sport's recent deal with Twitter to bring real time Champions League video clips to the social media site. This follows multiple insights uncovered by our research – bringing the kind of content second screening fans want, to a platform that they use, at the most relevant time for them.

6. WHAT OREO'S SUPERBOWL MOMENT TELLS US ABOUT SPORTS MARKETING'S FUTURE



What happened?

During the third quarter of Super Bowl XLVII when a temporary black out suspended play, the brand tweeted the ad above, and was deemed the unofficial 'winner' of the SuperBowl advertising battle.

Why do we care?

The Oreo moment is useful as it illustrates the risk and reward equation faced by brands seeking to use second screen to engage with sports fans.

The reward for Oreo was a huge global media moment and a warm feeling toward the brand for being a smart and witty companion. The subtext was that the brand understood sports fans, their often ironic sense of humour.

The Oreo moment also told us much about how the brand works behind the scenes. They were quick to take advantage and crucially for any brand seeking to live in real time sport, it was able to convert a good idea in to reality quickly. How many companies could get a creative idea to market so quickly under such deadline pressure without wading through a whole series of time laded sign off procedures? Not many is our guess.

Where's it going?

Oreo were not sponsors of Super Bowl XLVII, but they arguably received more publicity from it than any of the NFL's official partners. It was a further reminder that sponsorship success does not end on the signing of rights, it begins there, fueling creativity and a commitment to add value to the fans' experience.

What does all this mean for rights holders?

This does of course encourage an interesting debate around the role of official versus unofficial rights, and opportunities for brands to capitalise on sport events without paying for rights fees (the Oreo Superbowl viral is a good example of this).

Rights holders will undoubtedly become extremely proficient at policing the social media space in order to identify examples that could be construed as ambush, but there will always be grey areas and brands who remain reluctant to go official (whether based on their strategic brand positioning or cultural appetite for investment in rights fees), and who do occasionally seize the moment very effectively.

However, the demand consumers have for additional, high quality content and data via the second screen (as we have seen in this report) make it likely that the most effective second screen campaigns will be likely to involve brands who are using the second screen to magnify and extend the reach and engagement of their official associations.



THE TAKE OUT

The impact technology has had upon the viewing experience of sports fans is evident. As internet devices have become more widely adopted and an intrinsic part of modern life, their usage by sports fans during live action has consequently evolved to become a norm. This should come as little surprise, as mobile technology has infiltrated most parts of everyday life.

The important distinction with usage amongst sports fans is how second screen devices are being used as a natural extension, and an enhancement of the viewing experience. Sports fans have embraced the technology in a way that it has become an integral part of their experience – an extension of the all-consuming nature of their passion for sport.

By understanding the how, why, what and when of sport fans second screen usage, brands, and rights holders, have a fantastic opportunity to add value to a fans viewing experience and be rewarded with deeper connections with their target consumers and fans.

For more information about our data on the second screening sport fan, or how to use these insights to effectively reach your consumers, please contact:

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