

Project Roadblock: Mobile Advertising Case Study

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Prepared by



In partnership with



Executive Summary

The real-world showcase of Mobile Digital Television taking place in Washington, DC from May through early November 2010 provides a much-needed opportunity to learn how consumers would interact with traditional television on new platforms. Managed by the Open Mobile Video Coalition and sponsored by LG Electronics and Samsung, the Consumer Showcase provided nearly 375 participants with either a specially-modified mobile phone, netbook, or mobile digital TV/portable DVD player. In exchange, Consumer Showcase participants provided feedback on their experience.

Full results of the Consumer Showcase will be forthcoming; this case study focuses on the findings of the Project Roadblock: Mobile advertising test that was conducted during the Showcase. In partnership with the OMVC, TVB and the AdCouncil planned and executed a mobile campaign, based on the longstanding local TV "Project Roadblock" PSA campaign designed to raise awareness of the dangers of drunk driving and buzzed driving.

The 3-week Project Roadblock: Mobile campaign (centered around the July 4th holiday) included three advertising elements: 30-second spots, interstitial billboards that appeared during channel changes, and interactive banner ads that appeared on the mobile DTV channel guide. Eight local broadcast stations participated in the campaign.

Key findings include:

- Recall of drunk driving advertising by mobile phone users in the Showcase more than doubled, from 15% prior to the launch of the campaign to 34% post-campaign.
- The majority of users who recalled seeing the ads saw them while they were out of home (69%).
- While the 30-second spots had the highest recall, fully one-third of mobile phone users who remembered seeing the ads remembered seeing the interstitial billboards.
- A number of respondents were able to recall key elements of the campaign, including specific visuals that were unique to the billboard ads.

With 147 mobile phone users in the study, the test results should be considered directional rather than statistically projectable; nonetheless, the results are noteworthy and provide a good starting point for future Mobile DTV tests and the promise of Mobile DTV advertising.

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Background

Mobile DTV is an efficient, effective extension of TV stations' digital over-the-air (OTA) broadcasting that enables the receipt of live television by mobile phones, laptop and desktop computers, in-car entertainment systems, media players, and navigation devices. Mobile DTV has the potential to extend viewing of live content by making it possible for viewers to tune in to programs that they would not previously have been able to access while on-the-go. Additionally, emergency messages pertaining to breaking news and weather can also be accessed. Currently, stations in such diverse markets as Washington, DC, New York, Detroit, Philadelphia, Charlotte, Raleigh, Atlanta, Orlando, Chicago, Austin, Omaha, Columbus OH, Fresno and Los Angeles are transmitting a Mobile DTV signal. It is estimated that by the end of 2010, the number of local broadcast stations doing so will total 100.



Beginning in May 2010 and continuing through early November 2010, the Open Mobile Video Coalition (OMVC) is conducting a Consumer Showcase to demonstrate the utility of mobile digital television. The Showcase is taking place in the Washington, DC area and involves approximately 375 participants. Each participant was given an enhanced mobile device able to receive and play the digital signal sent over-the-air from local television stations:

- 147 Sprint customers exchanged their cell phones for specially-modified Samsung Moment phones,
- 200 participants received prototype Dell Inspiron Mini 10 netbooks equipped with an HD display and Mobile DTV circuitry, and
- 24 participants received Mobile Digital TV/Portable DVD Player combos from LG Electronics.

Mobile phone and netbook users are taking part in surveys, polls and focus groups during the Consumer Showcase, and participating in an online social media platform, or "community," to enable even richer insights about their experiences. Research being conducted by Harris Interactive and Rentrak during the Showcase examines participants' viewing habits, comfort with the devices and opinions on the overall experience of being able to view television – live television – via a mobile device.

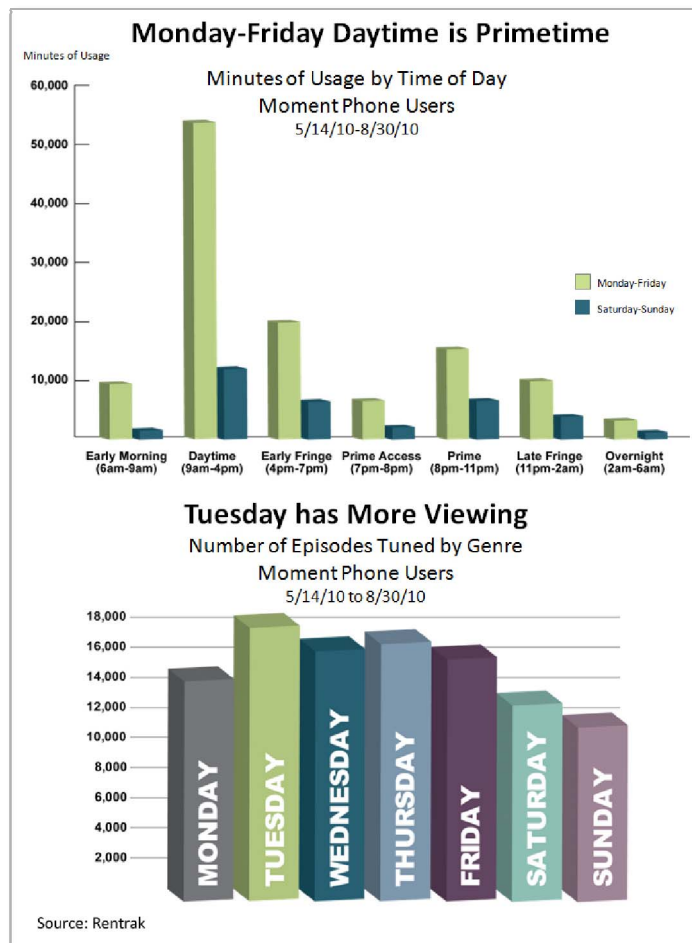
The showcase enables all participating parties – broadcasters, advertisers, device manufacturers, content providers and public officials – the opportunity to learn how consumers interact with content on this new platform. Nine local broadcast stations are participating in the Consumer Showcase. In addition, content from several subscription TV networks is available to viewers during the test. In all, 23 channels are available.

The OMVC will be releasing the complete results from the Washington Showcase, including more information on the consumer experience across all three platforms, later this year. The interim findings reported in this case study focus on users of the Samsung Moment phone.

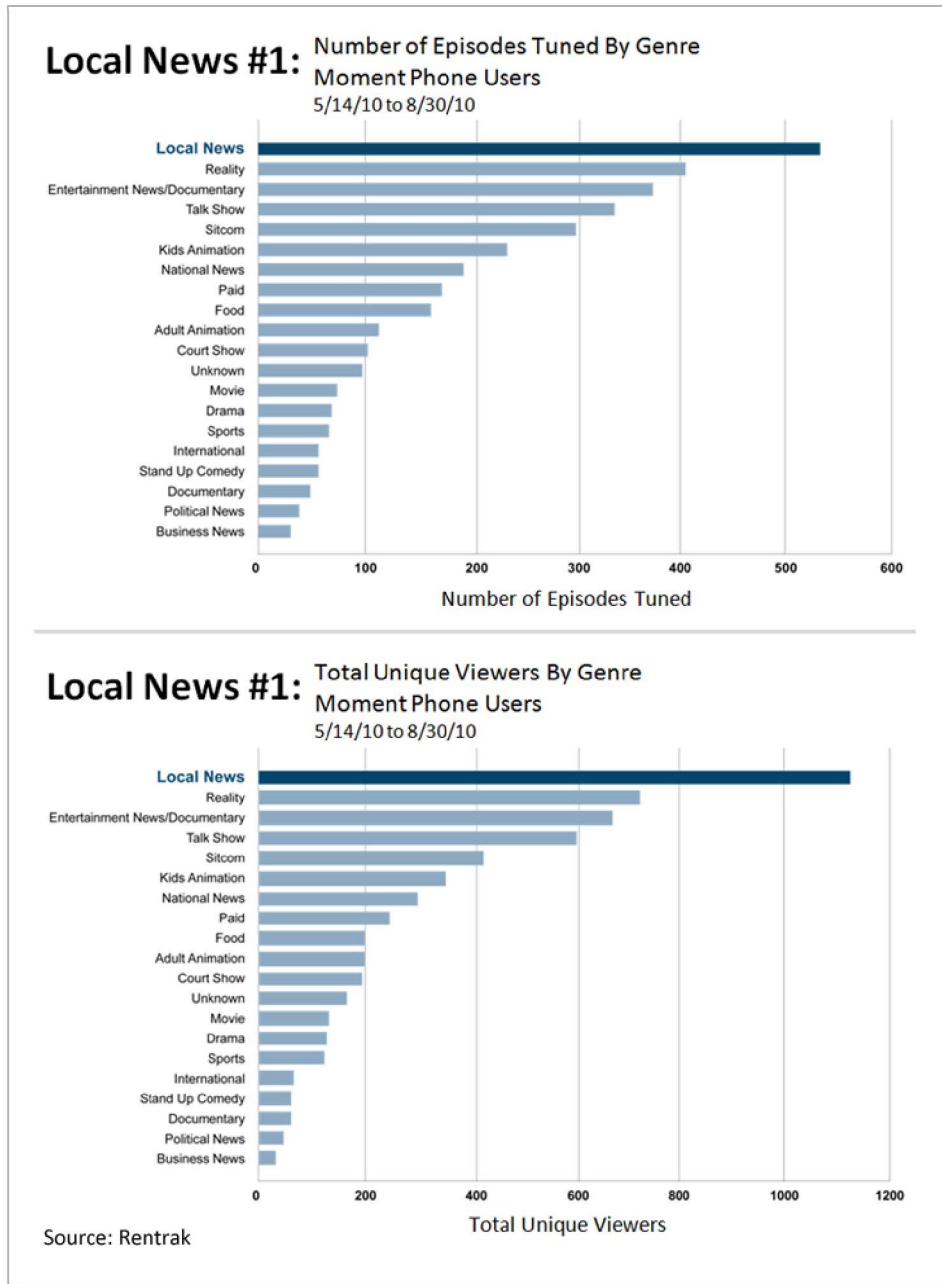
General Findings – Mobile Phone Users

Focusing on the users of the Samsung Moment phone, early results show strong interest in the ability to view programming from various locations outside of the home. The ability to watch live television, while carrying on daily tasks, while commuting (on public transportation or as a car passenger), in stores and malls, and virtually anywhere is welcome. Participants articulated their pleasure with the ability to tune to more local programming. With 147 mobile phone users in the study, results from the Showcase should be considered qualitative in nature, providing direction rather than statistically projectable results. Still, the findings are noteworthy and pave the way for future initiatives.

- Uninterrupted viewing is a benefit.*
Some noted that being able to watch part of a local morning news episode at home, and then head out the door while continuing to view that same episode on their mobile phone, was a strong benefit.
- The ability to stay apprised of breaking news is helpful and appreciated.*
The devices helped keep participants informed during emergencies such as storms and bomb threats, via local broadcast television coverage of breaking news.
- Participants reported watching more television than ever.*
This was due, in part, to the convenience of being able to view live local programming from various locations throughout the day. Over 33 program genres, and over 2,600 programs, were viewed.
- Mobile's "primetime" is daytime.*
Mobile DTV is primarily viewed during the work week, and viewing on mobile devices peaks Monday-Friday, 9am-4pm. Tuesday was the weekday that garnered highest viewing.



- *The most popular mobile program is local news.*
The likely popularity of local news was first noted in a pre-Showcase survey conducted by Magid Media Labs and was verified through viewing data gathered by Rentrak during the Showcase. Rentrak found that local news lead viewing by both total number of episodes viewed, and total unique viewers.



Advertising Implications

The fact that consumers embraced mobile DTV, and that live local broadcast news was a key reason for their positive reaction to mobile DTV, are significant findings. In addition to determining viewer interest in Mobile DTV, TVB viewed the Consumer Showcase as an opportunity to gather early insights into how consumers would react to advertising on a new platform. In partnership with the OMVC and the Ad Council, TVB formulated a plan to test advertising on mobile phones.

“Project Roadblock” is a longstanding public service campaign, developed by the National Highway Traffic Safety Administration (NHTSA), TVB and The Ad Council. The campaign is designed to raise awareness of the dangers of drunk driving, and “buzzed” driving.



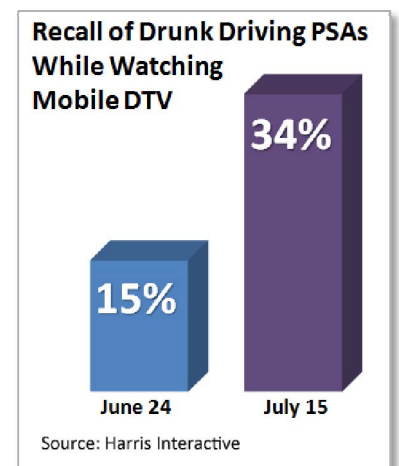
Traditionally this campaign has been aired most heavily between Christmas and New Year’s Eve when crashes and fatalities from drunk/buzzed driving increase. For the Consumer Showcase, a 3-week mobile Project Roadblock campaign (from June 21-July 11) was developed to tie-in to the July 4th holiday. The campaign included three advertising elements:

- *30-second spots* – both ROS and a simultaneous roadblock scheduled for July 1 at 4:59pm. These were live, over-the-air spots that were seen by all viewers of participating stations: on traditional TV and simultaneously via Mobile DTV.
- *Interstitial billboards* that appeared for 5-7 seconds between channel changes. These billboards included the key Buzzed Driving message points, slogan, and station call letters.
- *Interactive banner ads* on the Mobile DTV Channel Guide (ESG).



Harris Interactive conducted surveys pre- and post-campaign to provide information on awareness and recall of the PSAs for Mobile DTV viewers. Key findings include:

- *Recall of Drunk Driving Advertising increased significantly.* In late June, before the mobile campaign, only 15% of respondents recalled seeing advertising or PSAs about drunk driving. After the Project Roadblock: Mobile Campaign, Harris found that 34% of respondents recalled seeing advertising or PSAs about drunk driving. We can conclude that the Project Roadblock Campaign made an impact on mobile users; recall of drunk driving messages more than doubled.



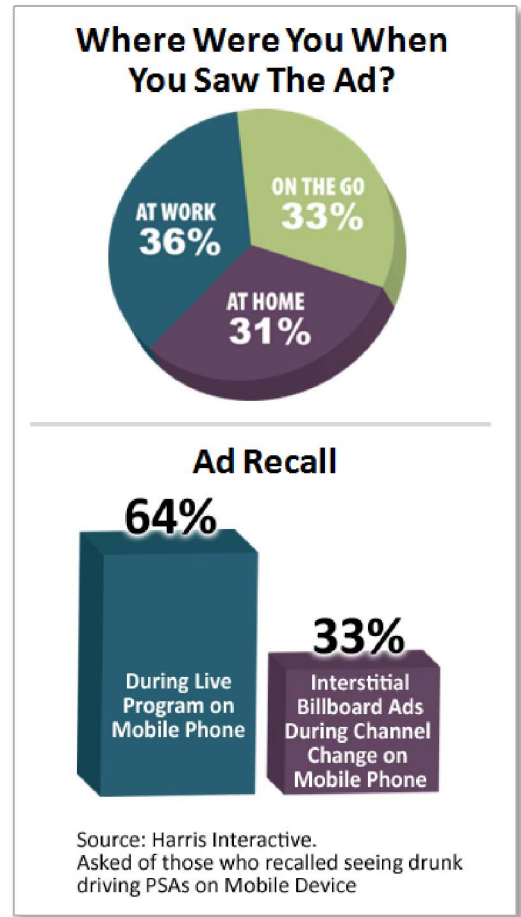
The majority of the mobile users who recalled seeing the ads saw them while they were out of home. This speaks to the power of mobile video for broadcasters and their advertisers. Viewing of the Project Roadblock ads took place in a variety of locations:

- 36% remembered seeing the ads while they were at work,
- 33% while they were “on the go,” and
- 31% while at home.

Clearly, reaching those mobile viewers opens up new possibilities for customized messaging.

- *Those who saw the drunk driving ads on their mobile phones were most likely to view the ads that ran in on-air programming:* 64% of respondents recalled seeing 30-second spots on their mobile phones during live programs. Also, 33% recalled the interstitial billboard ads that were visible during channel changes. This level of recall is even more significant when you consider that the interstitial ads appeared on only a small number of the channels that were available to mobile users - eight channels, to be exact.
- *A number of respondents were able to recall key elements of the campaign.* Viewers of the Project Roadblock: Mobile ads recalled distinct features of the ads, and articulated them in the following ways:

- That it was a “black and white advertisement using buzz words to get your attention about drunk driving,”
- “That it had the FOX5 logo attached to the advertisement,”
- “...it’s unexpected...it’s a quiet advertisement, not intrusive.”



Conclusions and Moving Forward

Broadcasters are encouraged by the viewers’ response to the Consumer Showcase. The showcase demonstrated that consumers have strong interest in Mobile DTV and that advertising on Mobile DTV holds much promise.

Vince Sadusky, CEO of LIN Media and president of the Open Mobile Video Coalition, sees great opportunity for mobile advertising through Mobile DTV. “One of our key findings from the OMVC’s Consumer Showcase of Mobile DTV is that ‘Daytime is the new Primetime,’ because viewers tuned in more frequently during the day than before and stayed with programs they could enjoy when away from the main living room TV. Whether during a break at work or while standing in line at the supermarket, it’s obvious that more people will watch local TV channels if given the opportunity to do so on a convenient device with interesting daytime programming. This is a great opportunity for mobile advertisers who want to reach more viewers more frequently.”

"The potential for Mobile DTV advertising is tremendous," said Abby Auerbach, TVB's executive vice president and chief marketing officer. "Research studies consistently demonstrate that television is the most persuasive ad medium, and local broadcast television has the strongest connection with communities. As Mobile DTV rolls out, local television will provide the added benefit of being the most portable and personal media connection to consumers."

Anne Schelle, executive director of the Open Mobile Video Coalition, said: "Our experience with the Washington Showcase should serve as a model for communities throughout the country, where local TV broadcasters can become both an ongoing resource for consumers and another distribution point for favorite premium content."

Leith El-Hassan, the Ad Council's VP - media marketing and distribution services, said: "The Ad Council is very excited about the results of the mobile video showcase in its ability to create awareness about our Buzzed Driving message. We are truly grateful for the support local broadcasters continue to provide for our sponsors' important messages."