INTRODUCTION

– For more than 10 years, AdReaction has delivered insights on perceptions of advertising, particularly digital formats. This year’s report explores multiscreen advertising on and across TV, laptops, smartphones and tablets.

– AdReaction 2014 helps marketers build brands in a multiscreen world.

– AdReaction findings assert that brands should evaluate the multiscreen landscape by considering both the scale of screens (reach/opportunity to contact) as well as the receptivity of people to various marketing approaches, both within and across screens.

– We used quantitative, qualitative and behavioral research methods to determine the scale, motivators and creative qualities that drive multiscreening.
CONDUCTED IN 30 COUNTRIES AROUND THE WORLD

www.millwardbrown.com/adreaction
Brief 15-question survey conducted via mobile devices among 16-44 year old multiscreen users, defined as people who own, or have access to, a TV and a smartphone and/or tablet.

Surveyed more than 12,000 consumers across 30 countries.

U.S. Sample Size = 444

+ 4-day mobile check-in (n = 30) to record instances of multiscreening, type of device used, duration, and reason.

+ 12 in-depth interviews to understand the “why’s” behind multiscreening behavior recorded in phase 1.

+ 6 executive interviews with industry leaders to understand how multiscreening is utilized today and predictions for the future.

+ Monitoring of traffic to 2014 Super Bowl advertisers’ websites in the 1-hour window that TV advertising ran the day of the Super Bowl and the same time the week prior.
FOUR ELEMENTS SHOULD BE CONSIDERED WHEN MULTISCREENING

- Audiences’ usage path and device preferences
- Mindset and motivations of the multiscreen consumer
- First screen advertising or content
- Ease and relatedness of the second screen progression
A SUCCESSFUL MULTISCREEN CAMPAIGN DEPLOYS ALL FOUR ELEMENTS

- **Mindset**: The typical multiscreen user is driven to a second screen by boredom to fill gaps in content and by habitual multitasking; but also by desires to be more productive, connected, informed, and engaged. **Users may cycle through many** or all of these **mindsets in a single viewing session**.

- **Usage Path**: TV remains the **most common first screen**; however, as video consumption on wireless devices proliferates, mobile is poised to step into that space.

- **First Screen Content**: TV advertising that is **integrated** with **content** of interest inspires users to continue their interaction with a brand through social or mobile channels.

- **Ease and Relatedness**: The most successful **second screen content** is additive and efficient.
SUMMARY OF U.S. FINDINGS

- A typical U.S. multiscreen user consumes 7 hours and 24 minutes of screen media per day during a 5 hour and 14 minute period. Smartphones and TV are virtually tied as the dominant screens (smartphones take up 2 hours and 31 minutes of time and TV takes 2 hours and 27 minutes of time).

- 41% of screen time is simultaneous usage of TV and a digital device. Of this, just 13% is meshing (simultaneous usage for related content), which is on par with the global average. 29% of screen time is stacking (simultaneous usage for unrelated content).

- The biggest multiscreen marketing opportunity is shifting (59% of screen time) – in which brands can take advantage of using synergistic multiscreen campaigns.

- TV is generally more of a starting point and digital devices are generally used more to continue/complete tasks. Multiscreen sequences are most likely to start on TV and continue on a smartphone. However, all screen sequences are possible.

- Marketing receptivity is higher for TV than for ads on digital screens, but brands cannot rely just on TV ads. Consumers expect brands to be present on multiple devices and are impressed by those finding entertaining and useful ways of delivering across screens.
U.S. CONCLUSIONS & IMPLICATIONS

- First screen content must raise the bar for the quality of creative expression, because TV advertisers are battling the second screen for viewers’ attention. Multiscreen users engage with content rather than brands.

- The successful multiscreen brand will partner with content providers who connect with your audience to create engagement opportunities that are fueled by these second and third devices.

- Boredom, a compulsion to multitask, a desire to feel connected, and curiosity are among motivators that compel audiences to use a second screen. First and second screens need to be agile enough to accommodate varied, rapid cycling mindsets.

- Multiscreening has huge lower funnel potential. Consumers aren’t coy about responding to brands when they offer value; brands shouldn’t be coy in offering.

- Each second device has a sweet spot. Understand how your users interact with the second device and build content to enhance that experience.
A comprehensive review of multiscreen marketing opportunities

NOTE: ALL DATA IS BASED AMONG TOTAL RESPONDENTS UNLESS OTHERWISE SPECIFIED

HOW MUCH ARE SCREENS USED?
- Usage (time spent)
- Usage by time of day

HOW ARE SCREENS USED?
- How much screen usage is simultaneous?
- How much simultaneous usage is meshing (same content) vs. stacking (unrelated content)?

HOW DO SCREENS INTERACT?
- Simultaneous usage by device
- Screen shifting sequences
- Qualities of first screen marketing that drive users to second screens

MULTISCREEN MINDSETS AND MOTIVATORS
- Mindsets that drive to multiscreening and resultant screen behaviors

WHAT DO PEOPLE THINK OF MULTISCREEN MARKETING?
- Receptivity and attention to marketing across screens
- Noticeability and receptivity of specific multiscreen marketing activities

IMPLICATIONS & BEST PRACTICES FOR MARKETERS
- Optimal device utilization
- Content generation and integration
HOW MUCH ARE SCREENS USED?
A typical multiscreen user in the U.S. consumes over 7 hours of screen media daily. This is slightly higher than the overall global average.

It is driven mainly by high smartphone and TV usage. Smartphone minutes are on par with the global average, but TV usage is 34 minutes higher than the global average of 113 daily minutes.

**Device Key**

- **TV**
- **Laptop**
- **Smartphone**
- **Tablet**

**TOTAL MINS**: 444 U.S. vs. 417 global

**Roughly how long did you spend yesterday...**

- **33%** of respondents spent 114 minutes
- **34%** of respondents spent 151 minutes
- **23%** of respondents spent 103 minutes
- **10%** of respondents spent 43 minutes

**Global Average**: 113 (27%) TV

**Global Average**: 108 (26%) Smartphone

**Global Average**: 50 (12%) Tablet

**Global Average**: 147 (35%) Laptop

**Global Average**: 151 (34%)
There is still a significant gap between time spent on mobile devices and mobile media investment levels in the U.S.

**Device Key**

- TV
- Laptop
- Smartphone
- Tablet

**DAILY SCREEN MINUTES VS. MEDIA SPEND**

- **DAILY SCREEN USAGE (minutes)**
  - TV: 147 (33%)
  - Laptop: 103 (23%)
  - Smartphone: 151 (34%)
  - Tablet: 43 (10%)

- **U.S. MEDIA SPEND (projected 2014)**
  - $68.5B (59%)*
  - $34.5B (30%)**
  - $13.1B (11%)

* Multiscreen spend share
** Total ad spend share

*Roughly how long did you spend yesterday...*  
*Source: 2014 predicted Media Spend data: eMarketer August 2013*
HOW SCREEN MINUTES COMPARE ACROSS COUNTRIES

U.S. screen minutes are in line with the global average, largely because U.S. TV minutes are the second highest globally (one minute less than the UK).

Smartphone minutes are lower than many Asian and African countries, but higher than in Canada and most European countries.

Laptop and tablet minutes are fairly typical.

Device Key

- [TV]: TV
- [Laptop]: Laptop
- [Smartphone]: Smartphone
- [Tablet]: Tablet

Roughly how long did you spend yesterday … watching television (not online)/ Using the Internet on a laptop or PC/ on a smartphone/ on a tablet?
SCREEN USAGE DURING THE DAY

Smartphones dominate daytime screen usage in the U.S., while TV and smartphones are equally used in the evening.
SCREEN USAGE DURING THE DAY VS. GLOBAL AVERAGE

U.S. TV usage is on par with global average until 6PM and then peaks more sharply. Both drop significantly after 9PM.

U.S. tablet usage spikes in the 6PM-9PM timeframe, but is lower than the global average earlier and later in the day.

Device Key

- TV
- Laptop
- Smartphone
- Tablet

What times of day yesterday were you...?
HOW ARE SCREENS USED?
LANGUAGE FOR A NEW ERA OF MULTISCREENING

• SIMULTANEOUS MULTISCREENING
  Using another digital screen at the same time as watching TV
    — MESHING
      Using an internet-enabled second screen to enhance the media experience by researching, talking about or engaging in the program being viewed on the television screen
    — STACKING
      Using an internet-enabled second screen to conduct unrelated media tasks while watching TV

• SHIFTING
  All non-simultaneous usage of screens throughout the day
MULTISCREEN MINUTES BY TYPE

41% of screen time is simultaneous usage of TV and a digital device. Whereas 59% was shifting, using one device at a time.

A typical multiscreen user spends 2h and 10 minutes each day watching TV while simultaneously using a second device.

**AT THE SAME TIME**
- Simultaneous: 130 minutes
- 41%

**AT DIFFERENT POINTS IN TIME**
- Shifting: 184 minutes
- 59%

**TOTAL MINS:** 444 U.S. vs. 417 global
**NET MINS:** 314 U.S. vs. 308 global
MULTISCREEN MINUTES BY TYPE

We can then break down the simultaneous minutes into “meshing” (where TV and a digital screen are being used to consume related content) and “stacking” (where the content is unrelated).

In the U.S., stacking is much more common than meshing.

**Shifts and Stacks**
- **Shifts (184 minutes)**: 59% of minutes
- **Stacks (91 minutes)**: 29% of minutes

**Related Content**
- **Meshing (39 minutes)**: 13% of minutes

**Unrelated Content**
- **Stacking (91 minutes)**: 29% of minutes

**Total Mins:**
- U.S.: 444
- Global: 417

**Net Mins:**
- U.S.: 314
- Global: 308
MULTISCREEN MINUTES ACROSS COUNTRIES

The number of minutes spent meshing in the U.S. are in line with the global average.

Stacking minutes in the U.S. are higher than in any other country.

Globally, Thailand meshes the most, U.S. stacks the most, and Vietnam shifts the most.
MULTISCREEN MINDSETS

A multiscreen user can potentially cycle through all of these mindsets in one multiscreening session.

- Boredom
- Compulsion to multitask
- Curiosity
- Pull to productivity
- Guilt / anxiety
- Desire to feel connected
- Guilt / anxiety
PEOPLE USE SCREENS SIMULTANEOUSLY TO:

1) Explore content
2) Relieve boredom
3) Boost productivity

What's your main reason for using multiple screens? How do they make your life better?

“TV is just TV. Laptop is for work, and smartphone is for socializing.”

“I sometimes look at stuff on smartphone and then look more in depth on laptop.”

“I feel alone if I don’t have the sound from the background.”

“Using multiple screens allows me to keep up with the fast pace of information, like when a commercial mentions a promo code and I can open a new window on my smartphone and quickly use that code to make the purchase I’ve been putting off.”

“TV can be boring.”

“I use laptop and TV at home, smartphone and tablet with Netflix and Hulu Plus at work.”

“They all work slightly differently, and sometimes it’s easier to focus using the different devices. Which one I use depends on how long the job will take. Sometimes I have the TV on for background noise for whatever I’m doing online. Sometimes the laptop is background to the TV (something to keep me occupied during commercials), and sometimes what’s on TV just isn’t enough to occupy my mind, so I do PC and TV both.”
Ad Reaction 2014 (USA)

REASONS FOR SIMULTANEOUS MULTISCREENING

Stacking is most common to fill time during ad breaks and to keep up with friends.

Multiscreen audiences are most likely to mesh to get more information about what’s on TV.

Why do you also use a second device (laptop, smartphone, or tablet) when you are watching TV?

<table>
<thead>
<tr>
<th>Reason</th>
<th>U.S.</th>
<th>Global Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>To keep up with friends on social media (not TV related)</td>
<td>38%</td>
<td>39%</td>
</tr>
<tr>
<td>To fill time during ad breaks</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Someone else has chosen what's on TV</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Just have TV on for background noise</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Need to get other things done</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>TV is not interesting enough for all my attention</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>More information about what's on TV</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>To discuss what I’m watching (e.g. via social media)</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>To interact with what’s happening on TV</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>To follow up on a TV ad</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>

ANY STACKING REASON: 88% (85% global)

ANY MESHING REASON: 36% (41% global)
THE PULL TO “BE PRODUCTIVE” DRIVES SOME MULTISCREENING, PARTICULARLY VIA LAPTOP

Laptop is the second device of choice for being productive while watching TV, but smartphone is also frequently used. It’s harder to be truly productive with a smartphone’s smaller keyboard for much other than email.

Checking email is the most frequent multiscreening “productivity” activity.

Consumers also catch up on work or household tasks like scheduling. Some work-at-home consumers always have their laptops going when they are watching TV.

GET SOMETHING DONE

STACK

I pretty much always need to get something done, whether it’s checking email for school projects, or checking my community college website to see my class schedule. - Garrett, 20

When watching TV, I am always checking my email on my phone to make sure I don’t miss anything.

- Beth, 23

Traditionally advertisers don’t like it when people look away from their TV spots to get a snack, fold their laundry or take a bathroom break. Being "distracted" with a screen is different – it gives us rich opportunities to interact with consumers, opportunities that just weren’t possible in the kitchen, laundry room or bathroom. At Bravo we call this "productive distraction," because consumers are being productive. But it’s also potentially a productive time for brands, an opportunity to enhance the TV experience that they’re taking a quick break from. Multiscreening gives us a whole new take on distraction that’s productive for brands.

- Dave Kaplan, NBC Universal
Multiscreen users often grab their second device to relieve their boredom, particularly during commercial breaks. Typically, this is to do something different from what’s happening on TV (stacking).

Any device can help relieve boredom, but a smartphone is the easiest second device to grab when bored, because it’s ever present and great for fast, “bite-sized” functionality like social check-ins, which can engage briefly.

If I’m bored with what my husband is watching on TV, I’ll get out my laptop and start watching something different. - Ashley, 41

Sometimes when I’m bored I’ll shop online or play games. If I’m bored, it gives me another option. - Haley, 18

I get so bored watching Dora with my kids. I pick up my device to do something else. - Ana, 32

When I don’t have a device with me, I am more bored, distracted and annoyed during commercials. - Beth, 23

It’s pretty common for me to get bored when I am watching TV. I use my smartphone to kill time. - Garrett, 20

I use my phone a lot to fill the ad breaks. I text people and fill in the time until the show comes back. - Anthony, 22

BOREDOM LEADS TO MULTISCREENING, PARTICULARLY STACKING
Social media is utilized for meshing and stacking; it’s often in conjunction with finding out more information. For example, you found out something interesting that you then decide to share.

Social media is also well utilized when driving participation and content interaction.

Texting can also achieve the same purpose.
CONTENT EXPLORATION IS THE MOST IMPORTANT REASON CONSUMERS MESH

Consumers want to know more about what they are watching, so, they pick up a second device to get that information or additional entertainment related to what’s on TV (meshing).

Most of this behavior is about interacting with content, not brands. People want to know more about the TV show/movie, look at behind the scenes footage, get to know the cast a bit, etc.

If I didn’t have my phone with me, I couldn’t interact. And that’s the key for me. - Anthony, 22

MESH

I get curious about things. Mike Myers is in this movie, what else has he been in? Or during a game, I’ll look up an NBA player who scored 35 points. - AJ, 37
I was using my laptop while I was watching CNN. I saw an ad for a documentary called “The Imposter,” and I used my laptop to find out more about it. - Beth, 23

Sometimes I see someone in a show I recognize but don’t know. I’ll go to IMDB to find out who they are. - Beth, 23

Ellie Kemper was guest-hosting Ellen, I didn’t know much about her so I went to her Facebook page, and made a comment about what a great job she did on the show. - AJ, 37

I was looking for personal info about the characters on the show. It lets me get more in depth about the show. - Garrett, 20

I frequently look up recipes at the Food network website. - Beth, 23

I used the CBS app to find out about other episodes of Undercover Boss and watch background videos. - Garrett, 20

The History Channel app gives me great background info about the shows. - Adam, 41

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I looked up their songs and downloaded them on my phone. - Ana, 32

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I looked up their songs and downloaded them on my phone. - Ana, 32

While watching the Grammys, we looked up the acts online to learn more about them and their records. And all of my friends were sharing their reactions to the live show on Facebook. We all connected around this event. - Ashley, 41

It was really fun during the Grammys to be able to see different camera angles on Facebook. - Adam, 41
AUDIENCES ARE USING THEIR SECOND SCREENS FOR LOWER FUNNEL PURCHASE BEHAVIORS

Many people use a second device to browse and shop while they watch, and in many cases, they respond to something they saw or heard mentioned on TV.

Often users end up at sites to look at product reviews.

BUY SOMETHING FROM TV

I saw a story on E! about Kate Hudson’s new fitness gear line. I used my laptop to Google it, and I ordered $80 worth of stuff. - Beth, 23

I saw an ad for Nutribowl and went to YouTube on my tablet to find videos about it, read the testimonials, then used my tablet to order one. Adam, 41

I saw a new cycle brand when I was watching TV, so I looked it up online right away. - Randy, 39

Expedia advertised an app where you’d get 15% off if you downloaded, so I downloaded it to plan a trip. I also downloaded shopping apps from Target and Walmart. - AJ, 37

A lot of times, when I’m watching TV, I’ll get the idea to shop for something, whether it’s something I see on the show or advertising or something random. - Garrett, 20

I saw a commercial for Keurig, then I used my laptop to look at the reviews to compare it to other machines. - Ana, 32
HOW DO SCREENS INTERACT?
SIMULTANEOUS AND EXCLUSIVE USAGE BY DEVICE

Smartphones are used most – both alone and together with TV.

Simultaneous smartphone + TV usage is above the global average, as is TV + PC usage.

In the U.S., tablets are more likely to be used simultaneously than exclusively.

Device Key

- TV
- Laptop
- Smartphone
- Tablet

Global Average: 31 (29%)
- 38 MINS (37%)
- 65 MINS (63%)

Global Average: 54 (37%)
- 68 MINS (45%)
- 83 MINS (55%)

Global Average: 24 (49%)
- 24 MINS (55%)

Global Average: 25 (51%)

Global Average: 77 (71%)

Global Average: 93 (63%)

AT THE SAME TIME

AT DIFFERENT POINTS IN TIME
SEQUENCES OF SCREEN SHIFTING (RELATED CONTENT)

The most common sequence is starting on TV and continuing to a smartphone, but starting on smartphone is also emerging as a common sequence.

<table>
<thead>
<tr>
<th>START ON</th>
<th>TV</th>
<th>LAPTOP</th>
<th>SMARTPHONE</th>
<th>TABLET</th>
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<tr>
<td></td>
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<td>9</td>
<td>20</td>
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<td>CONTINUE</td>
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<td>TABLET</td>
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*In which of the following ways do you sometimes shift the same task from one device to another at a later time? (By a task, we mean things like watching a show or video, searching for information, shopping, planning a trip or social networking)*
### SEQUENCES OF SCREEN SHIFTING (RELATED CONTENT)

TV is the most common start point, while digital screens are more common continuations. However, TV is a less common start point in the U.S. than globally.

Smartphones and laptops are the most common continuation devices.

Tablets are a more common start point in the U.S. than we see globally.

<table>
<thead>
<tr>
<th></th>
<th>U.S.</th>
<th>Laptop</th>
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<tbody>
<tr>
<td><strong>NET (ANY START %)</strong></td>
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<td>U.S.</td>
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<td>Global</td>
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<td>28</td>
<td>33</td>
<td>13</td>
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<tr>
<td><strong>NET (ANY CONTINUE %)</strong></td>
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<td>U.S.</td>
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<td>Global</td>
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</tbody>
</table>

In which of the following ways do you sometimes shift the same task from one device to another at a later time? (By a task, we mean things like watching a show or video, searching for information, shopping, planning a trip or social networking)
WHAT DO PEOPLE THINK OF MULTISCREEN MARKETING?
AD RECEPTIVITY BY SCREEN (FAVORABILITY AND ATTENTION)

TV receptivity is highest overall, in line with global averages.

Digital ad receptivity is lower across devices and below global averages.

This story applies equally to both components of receptivity (i.e. to favorability and attention).

How would you characterize your attitude towards each of the following formats of advertising?

Each time you see each of the following, how much do you typically pay attention? Base: access to device.
MULTISCREEN OPPORTUNITY

Combining receptivity with screen time shows that TV clearly remains the largest U.S. media opportunity due to highest overall minutes & strong receptivity.

Digital minutes & receptivity trail the global average, but still add up to a huge opportunity (bigger than TV), if low receptivity challenges can be overcome.

Device Key

TV | Laptop | Smartphone | Tablet

Scale of opportunity = minutes per device. Marketing receptivity = average of favorability and attention.
SCREEN ROLES (MEDIUM AS MESSAGE)

All screens can achieve all tasks, but there are slight differences in implied messaging by screen.

In the U.S., TV ads are still most associated with salience, meeting needs and trend setting, while smartphone ads help brands be seen as different.

What do you think a brand is trying to tell you when it advertises in each of these places?

Device Key

<table>
<thead>
<tr>
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<td>LOVE</td>
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<td>SETTING TRENDS</td>
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<td>MEET NEEDS</td>
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</tbody>
</table>
We see a similar picture globally. TV ads are most associated with salience, love and meeting needs, but digital ads on all devices help brands be seen as different.

Device Key

TV  Laptop  Smartphone  Tablet

What do you think a brand is trying to tell you when it advertises in each of these places?
MULTISCREEN OPPORTUNITY BY MARKETING APPROACH

TV ads promoting Web URLs and mobile apps are most familiar.

Receptivity is strongest to interactive TV ads and TV event engagement. Generally, “entertainment” is more appealing than “more information.”

The lack of a single familiar and popular approach means that U.S. marketers will likely need to experiment with multiple ways of connecting across screens.

Which of the following types of multiscreen advertising have you ever noticed?

Which types of multiscreen advertising do you feel positive towards? (data among those ever noticed)
MULTISCREEN OPPORTUNITY BY MARKETING APPROACHES (GLOBAL)

Globally, micro-video is the most familiar and popular marketing format. This suggests that multinational marketers should invest here to develop content which can transfer easily across screens.

TV ads promoting mobile apps, Facebook pages and websites are also familiar. Receptivity is high for TV ads with interactivity.

Which of the following types of multiscreen advertising have you ever noticed?
Which types of multiscreen advertising do you feel positive towards? (data among those ever noticed)
INTERACTIVITY IS KEY TO CONTINUING THE CONTENT EXPERIENCE

Consumers like to use content provider sites, apps, and games while they are watching the content on TV (meshing). They like getting involved in what’s happening on TV, particularly “continuing” the content experience during commercial breaks.

When they’re doing this with a brand, it’s usually about information, not entertainment or interaction. Interactions with content seem to be deeper.

**BRANDS**

- I saw Odwalla advertised then went to their site to see how much sugar is in it. - Beth, 23
- I saw a Tide commercial, then went to their Facebook page, watched a clip of an old Tide commercial, and posted about it. - Matthew, 20
- If I don’t know the brand or product I will visit the brand’s Facebook page – that’s easier than having to Google. - AJ, 37

**CONTENT**

- I went to the Facebook page for the antique store owned by the guy on American Pickers. The commenters said it’s not a very good store. - Randy, 39
- While I was watching Walking Dead, I was playing their game and interacting with the AMC app during the commercial break. It’s cool to have something to do during the commercial break that is connected to the show. - Haley, 18
- I like participating in the polls on Pardon the Interruption. - AJ, 37
- Sometimes I’ll Facebook friend the talent on the show. - Adam, 41
IMPLICATIONS AND BEST PRACTICES FOR MARKETERS
INDUSTRY EXPERTS HAVE GUIDELINES FOR SUCCESSFUL MULTISCREENING EXECUTION

There’s no hard and fast rule for how best to use each device. You’ve got to determine how best to use a particular device with a consumer in a specific situation.

Andy Lees, Lumi

The multiscreen experience you deliver needs to reflect the content the consumer is watching and their motivations for watching it.

Dave Kaplan, NBC Universal

You can’t make people work too hard for the payoff. They’re not as engaged, even if they’re loyal.

Michael Angelovich, McGarryBowen

Each of the parts has to tell the whole story.

Michael Angelovich, McGarryBowen

Don’t take people away from the content by sending them to YouTube. Vine is a better complement for TV viewers.

Scott Kreci, PBS Equitrekking

People are so used to being broadcasted at with TV, the interaction experience doesn’t come naturally to them. It requires a lot of behavioral change for people to use TV this way.

Andy Lees, Lumi
EACH DIGITAL DEVICE CAN PLAY MULTIPLE ROLES, BUT HAS A “SWEET SPOT” FOR MULTISCREEN EXPERIENCES

<table>
<thead>
<tr>
<th>Device</th>
<th>Default Device</th>
<th>Productivity Tool</th>
<th>Entertainment Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMARTPHONE</td>
<td>The “Do it All” device if you don’t have a laptop/ tablet</td>
<td>Faster for lots of content and the multitasking</td>
<td>Great for content in transit</td>
</tr>
<tr>
<td></td>
<td><strong>Frequently Used for:</strong> Social Media, Email, Texting</td>
<td><strong>Frequently Used for:</strong> Working, Searching, Online Shopping</td>
<td><strong>Frequently Used for:</strong> Social, Email, and Alternative entertainment when bored by TV</td>
</tr>
<tr>
<td></td>
<td><strong>Biggest Brand Opportunity:</strong> Calls-to-action like polls and sharing opinions via social</td>
<td><strong>Biggest Brand Opportunity:</strong> Detailed digging into TV content</td>
<td><strong>Biggest Brand Opportunity:</strong> Extensions of the TV experience w/ additional video content (e.g. behind the scenes)</td>
</tr>
</tbody>
</table>
AUDIENCES ARE CURIOUS AND WANT TO LEARN MORE AND PLAY ALONG

• Provide behind-the-scenes footage from TV commercial shoots and mention supplemental video in your TV spots
• Sponsor or advertise in content apps that are created by networks, as consumers are already spending time with these tools
• Invest in sharing updates about a show, not just advertising during the show
• Extend the show’s content through the commercial break via secondary devices (e.g., the Walking Dead game)

Evolve the 30 second TV spot. People are tethered to their device when they are watching TV. Use the second screen to enrich the first screen by providing audiences the opportunity to readily comment, vote, or express an opinion on the TV spots they’re seeing. Also, consider the importance of verbal cues in TV spots (such as sponsored vignettes featuring programming content or show talent) - as familiar or contextually relevant audio can help re-engage the multi-screening viewer with the primary screen.

Dave Kaplan, NBC Universal

I want more information about shows, more places to talk about shows live as the show is running, notify me when the show’s going to be on. - AJ, 37

I need to know if my show is coming back! - Ashley, 41
CONTENT IS KING. SUCCESSFUL BRANDS INTEGRATE WITH COMPPELLING CONTENT

Pepsi’s Get Hyped for Half Time was the most successful Super Bowl advertising campaign in increasing traffic to the brand’s website within the hour that the advertising occurred.

The month-long Get Hyped for Halftime master brand campaign included TV, out-of-home advertising elements, and a strong digital video presence.

In the hour after the commercial ran, Pepsi saw the largest increase in website traffic, versus that same time the prior week, compared than any other Super Bowl advertiser.
STORYTELL WITH GREAT MUSIC AND VISUALS

The Volkswagen *Wings* ad centers around VW's 100,000 mile claim—that the brand has the most vehicles on the road with over 100,000 miles.

It creates a story that every time a VW vehicle hits 100,000 miles, a German engineer gets his wings. There are feathered appendages sprouting from engineers' backs, guys float around a VW factory like angels in lab coats, a "wings envy" scene in the men's room.

The ad is replete with compelling visuals and a catchy soundtrack.
Mitchell Gold + Bob Williams, a maker of high-end furniture partnered with the network TV show “The Good Wife” to feature MGBW in the Good Wife set. Furniture is available for purchase on a special section of the MGBW website.
Goldieblox, a girls’ construction and storybook toy start-up, created a two-minute digital ad featuring a live action Rube Goldberg machine. The ad was covered on Upworthy, went viral and received over 8.5 million views in the first eight days it was up.
EMBRACE IMPACT

Multiscreening is ultimately about putting each device to its best use to engage audiences and thereby build brands.

Multiscreening challenges us all to embrace the language of impact and become more audience-centric in our measures of success.

When you're evaluating the impact of multiscreening, it's tempting to only look at the interaction numbers. But that doesn't really tell the full story. They might not be TV-size ratings, but the consumers who interact with multiscreen tools are deeply engaged, and in many cases the most receptive to a sponsor’s messaging. Also, it's important to remember that if several thousand people are interacting with a show on their second screen, and that content is being seamlessly injected into the on-air program itself, those individual can potentially influence the viewing experience of the millions of other people who are watching the show. So multiscreening isn't just about those who interact, it's about how those interactions can drive greater involvement and investment from the entirety of the on-air audience.

Dave Kaplan
NBCUniversal, Inc.