AdReaction
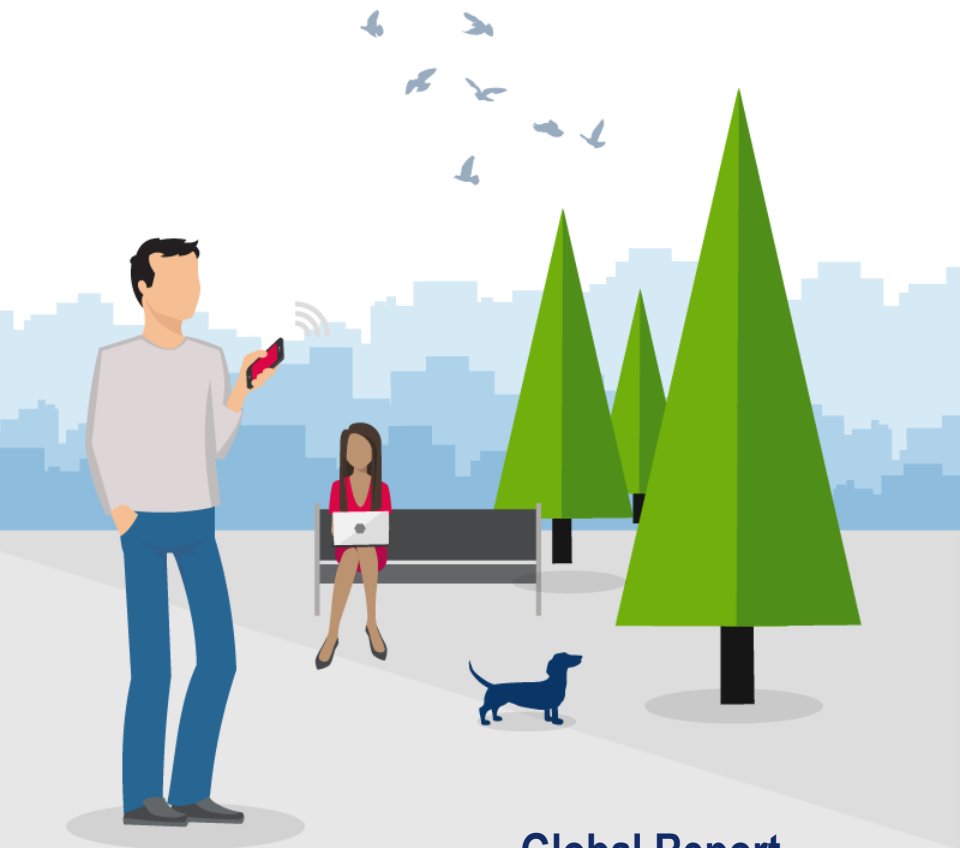
Marketing in a multiscreen world

Global Report

INTRODUCTION

– Every year, channels change. Every year, Millward Brown helps you learn more about optimizing your media plans to move with change. This year, we're **making sense of the multiscreen world for brand building**.

– For more than 10 years, AdReaction has delivered insights and findings related to the opinions and perceptions of advertising, particularly digital formats. AdReaction 2014 dives into multiscreen advertising by studying ads on TV, laptops/PCs, smartphones and tablets.

– The core underlying principle of AdReaction is 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.

– For this year's study, we administered a 15-question survey, via smartphone or tablet, to more than 12,000 multiscreen users, ages 16 to 44, across 30 countries. Multiscreen users were defined as people who own, or have access to, a TV *and* a smartphone *and/or* a tablet.

CONDUCTED IN 30 COUNTRIES AROUND THE WORLD

www.millwardbrown.com/adreaction

SUMMARY OF FINDINGS

– **A typical multiscreen user consumes 7 hours of screen media per day during a 5 hour period**. In most countries, smartphones are now the primary screen, taking up 2.5 hours of time daily. Smartphones and laptops dominate daytime screen use while TV takes center stage in the evenings, when tablet use also peaks.

– **Just 35% of screen time is simultaneous use of TV and a digital device**. Of this, just 14% is meshing (simultaneous use for <u>related</u> content). 22% is stacking (simultaneous use for <u>unrelated</u> content).

– **Therefore, the biggest multiscreen marketing opportunity is shifting (65% of screen time)**. Brands can take advantage of shifting by 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.

– **Receptivity is higher for TV than for ads on digital screens,** but brands cannot rely TV ads alone. Consumers expect brands to be present on multiple devices and are impressed by those who find entertaining and useful ways of delivering across screens.

– **Different channels play different roles**, both in terms of their effectiveness and implied messaging.

CONCLUSIONS & IMPLICATIONS

In order to reach and engage a large number of multiscreen users, most global brands will need to deploy media plans with a far heavier mobile emphasis than they do at present. This is increasingly the primary way to access many groups of people.
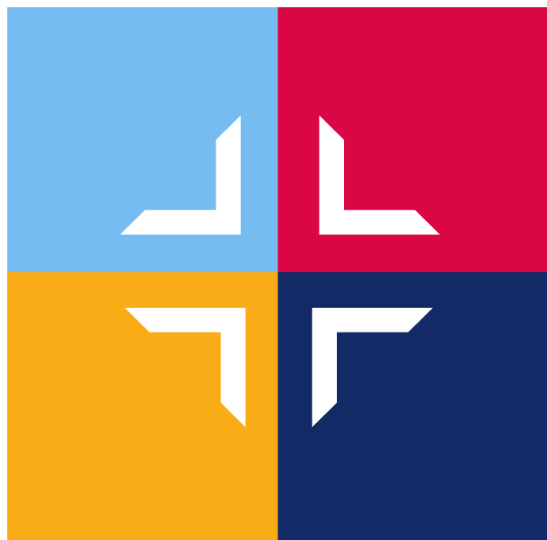
The main principles for success across screens are:

- **Be Consistent** – Whenever someone engages with you, whatever screen they're using and wherever they are, your brand experience and messaging should be uniform.
- **Be Connected** – Think about second-screen experiences, specifically how your marketing can interact engagingly between screens and travel seamlessly across screens.
- **Be Considered** – Some screens are better than others at communicating particular aspects of your brand's personality.
- **Be Concise** – Use mobile-friendly, shareable content that entertains first, informs second.

This report contains examples from marketers around the world who are successfully putting these principles into practice, as well as the perspectives of industry experts.

CONTENT OUTLINE

A comprehensive review of multiscreen marketing opportunities

HOW MUCH ARE SCREENS USED?

- Time spent
- Use by time of day

HOW ARE SCREENS USED?

- Simultaneous screen use
- Meshing (related content) vs. stacking (unrelated content)
- Reasons for simultaneous multiscreen use

HOW DO SCREENS INTERACT?

- Simultaneous use by device
- Screen shifting sequences

WHAT DO PEOPLE THINK OF MULTISCREEN MARKETING?

- Receptivity and attention to marketing across screens
- Noticeability and receptivity of multiscreen marketing activities
- Screen roles - medium as message and effectiveness learning

HOW DO DIFFERENT PEOPLE MULTISCREEN?

- Useful typologies as you target across screens

WHAT SHOULD BRANDS DO?

- Recommendations brought to life via best-in-class examples
- Reactions and opinions of industry experts

Notes:
1) All data in this report is based among total respondents unless otherwise specified
2) All figures in this report are global averages across countries unless otherwise specified

HOW MUCH ARE SCREENS USED?

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DAILY SCREEN USE (MINUTES)

A typical global multiscreen user consumes just under 7 hours of screen media daily.

Smartphones are now comfortably the largest single screen medium around the world.

Combined with tablet minutes, mobile devices now take up 47% of all screen time.

Device Key

TV	Laptop	Smartphone	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?

113
minutes
(27%)

147
minutes
(35%)

108
minutes
(26%)

50
minutes
(12%)

TOTAL MINS: 417

DAILY SCREEN USE VS. MEDIA SPEND

As of 2013 there is still a significant gap between time spent on mobile devices and global mobile media investment levels.*

It's no surprise that mobile spend is forecast to grow rapidly in the next few years. If anything, it should be growing faster than forecast.

	TV	Laptop	Smartphone	Tablet
DAILY SCREEN MINUTES	113	108	147	50
	27%	26%	35%	12%
GLOBAL MEDIA SPEND				
2013	66%	29%	4%	
2016	60%	29%	12%	

Device Key

TV   Laptop   Smartphone   Tablet

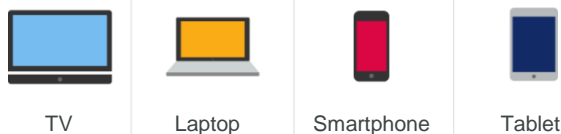*Roughly how long did you spend yesterday…watching television (not online)/ Using the Internet on a laptop or PC/ on a smartphone/ on a tablet?*
*Source: ZenithOptimedia Advertising Expenditure Forecasts December 2013 (repercentaged within screen media)

AdReaction 2014

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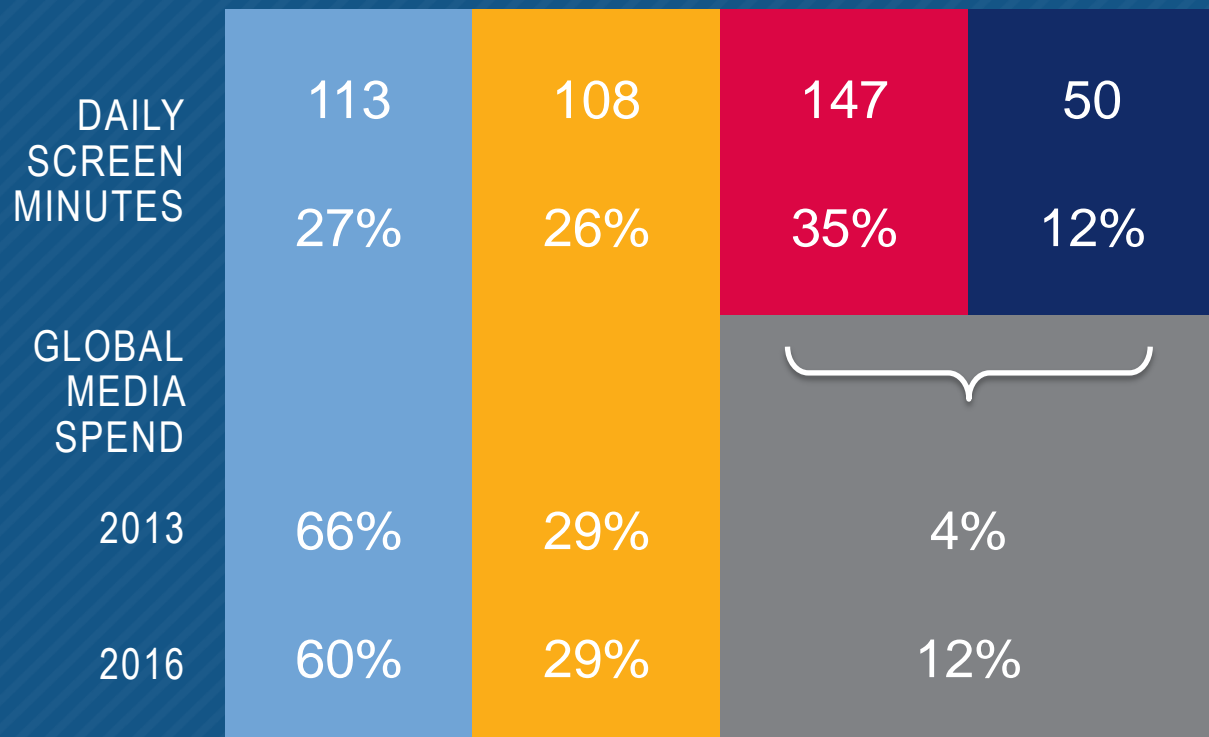
HOW SCREEN MINUTES COMPARE ACROSS COUNTRIES

Overall screen minutes vary significantly by country, from 9 hours in Indonesia to just over 5 hours in Italy.

Smartphones are now the most viewed medium in all countries except UK, France and Spain (where TV leads) and Hungary, Poland, Russia, & Slovakia (where laptops lead).
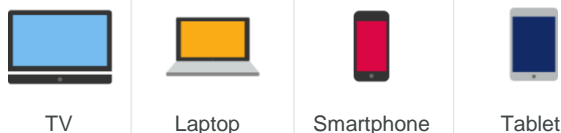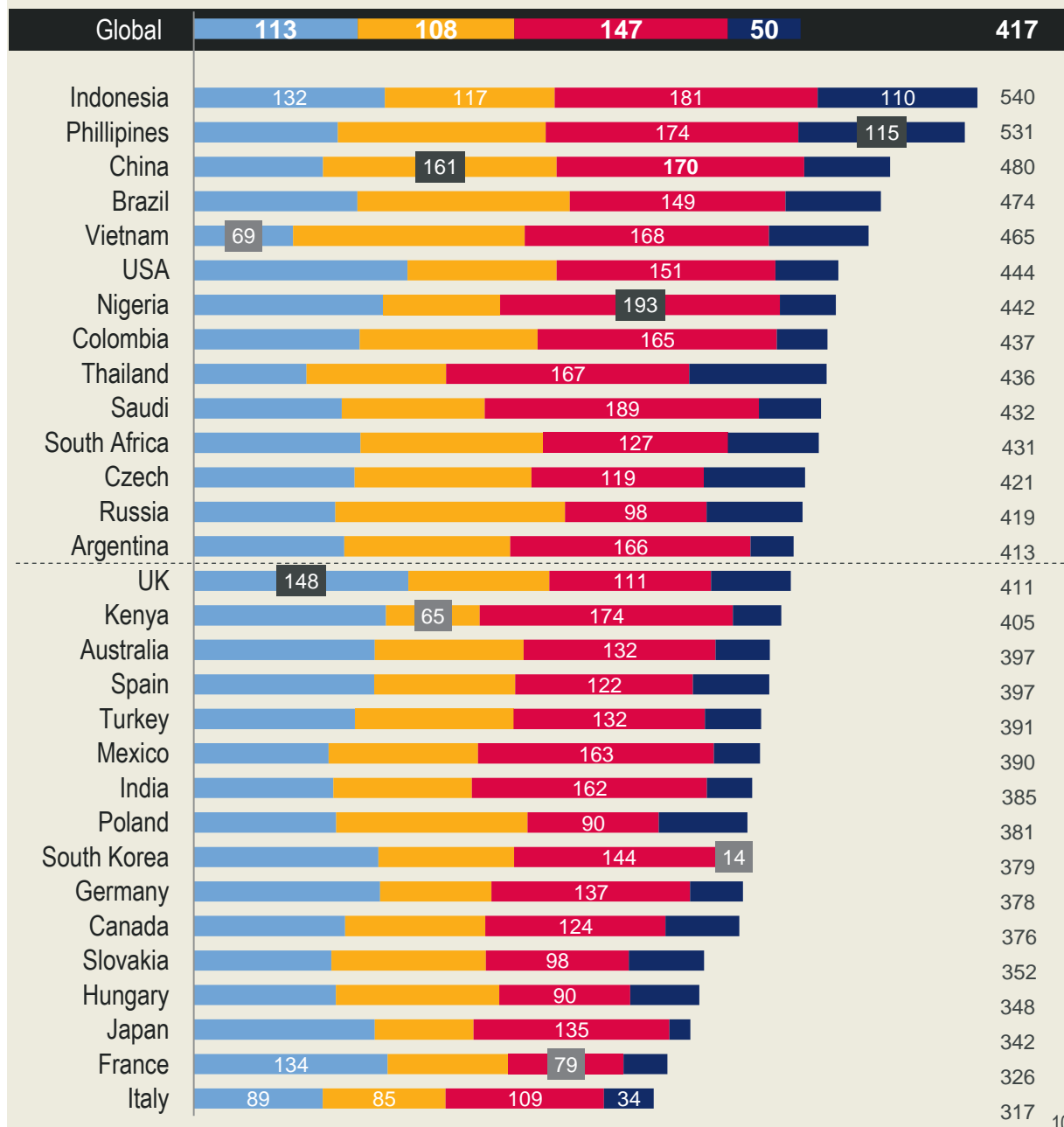
Device Key

TV | Laptop | Smartphone | 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?

Country	TV	Laptop	Smartphone	Tablet	Total
Global	113	108	147	50	417
Indonesia	132	117	181	110	540
Phillipines			174	115	531
China		161	170		480
Brazil			149		474
Vietnam	69		168		465
USA			151		444
Nigeria			193		442
Colombia			165		437
Thailand			167		436
Saudi			189		432
South Africa			127		431
Czech			119		421
Russia			98		419
Argentina			166		413
UK	148		111		411
Kenya		65	174		405
Australia			132		397
Spain			122		397
Turkey			132		391
Mexico			163		390
India			162		385
Poland			90		381
South Korea			144	14	379
Germany			137		378
Canada			124		376
Slovakia			98		352
Hungary			90		348
Japan			135		342
France	134		79		326
Italy	89	85	109	34	317

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SCREEN USE DURING THE DAY

Smartphones and laptops dominate daytime screen use, while TV takes center stage in the evenings.
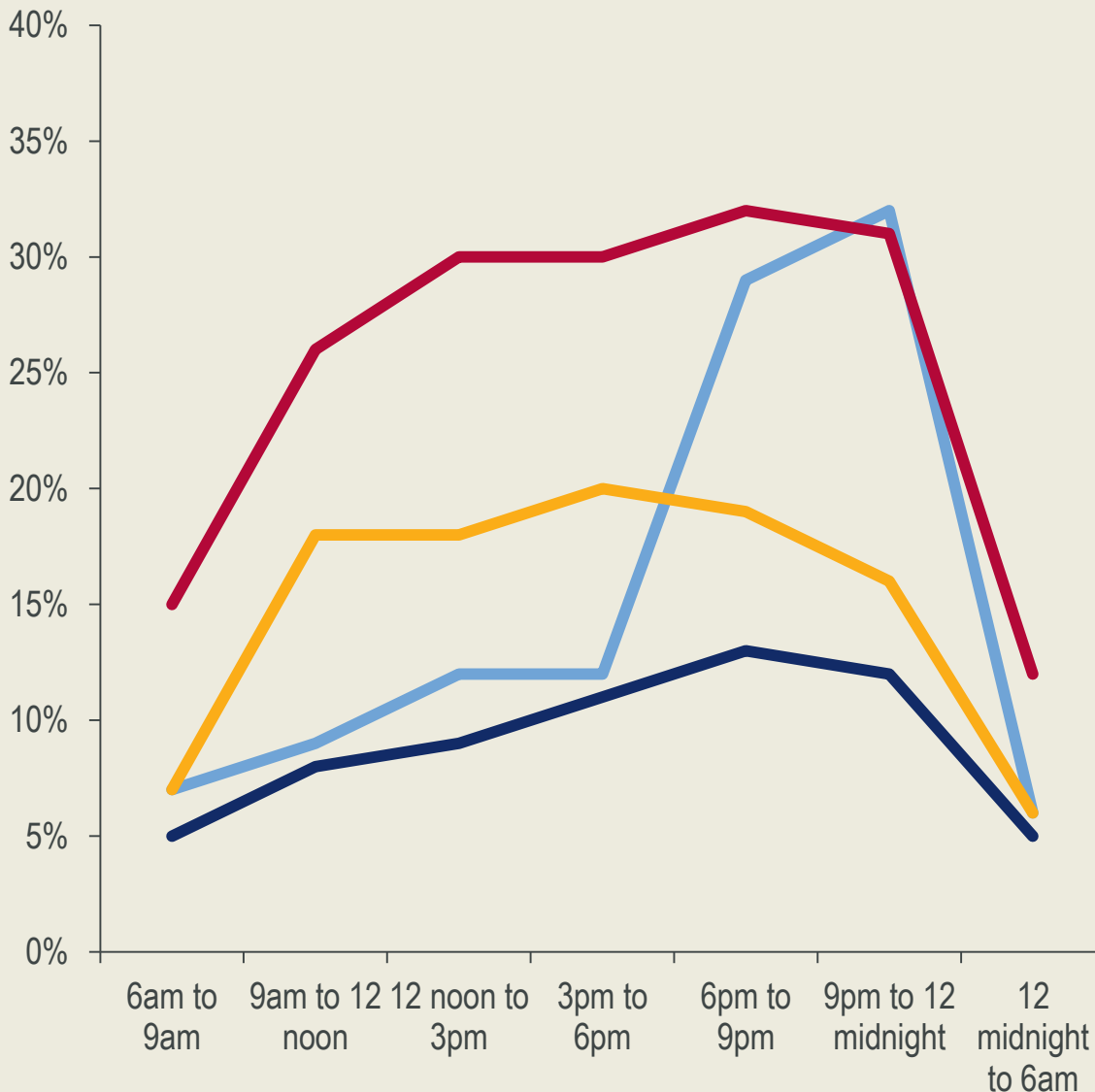
Device Key

TV   Laptop   Smartphone   Tablet

What times of day yesterday were you...

HOW ARE SCREENS USED?

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MULTISCREEN MINUTES BY TYPE

Of the total time screens are being viewed, simultaneous use with TV is taking place around a third of the time.

Of their 7 hours screen consumption, 109 minutes is simultaneous consumption of a digital screen while watching TV.

Hence, a typical global multiscreen user spends just over 5 hours (308 minutes) with screens every day.

AT DIFFERENT POINTS IN TIME

SHIFTING
(199 minutes)
65%

SIMUL-TANEOUS
(109 minutes)
35%

AT THE SAME TIME

TOTAL MINS: 417
NET MINS: 308

Simultaneous: *At the same time as you were watching TV yesterday, how much time did you also spend using the Internet?*

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MULTISCREEN MINUTES BY TYPE

We can then further 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).

Generally, more time is spent stacking than meshing.

RELATED CONTENT

MESHING
(42')
14%

SHIFTING
(199')
65%

AT DIFFERENT POINTS IN TIME

AT THE SAME TIME

STACKING
(67')
22%

UNRELATED CONTENT

TOTAL MINS: 417
NET MINS: 308

Simultaneous: *At the same time as you were watching TV yesterday, how much time did you also spend using the Internet?*
Meshing: *While you were watching TV and using the Internet yesterday, how much of the time were you doing something related to what was happening on TV?*
Stacking: *Simultaneous minutes minus meshing minutes*

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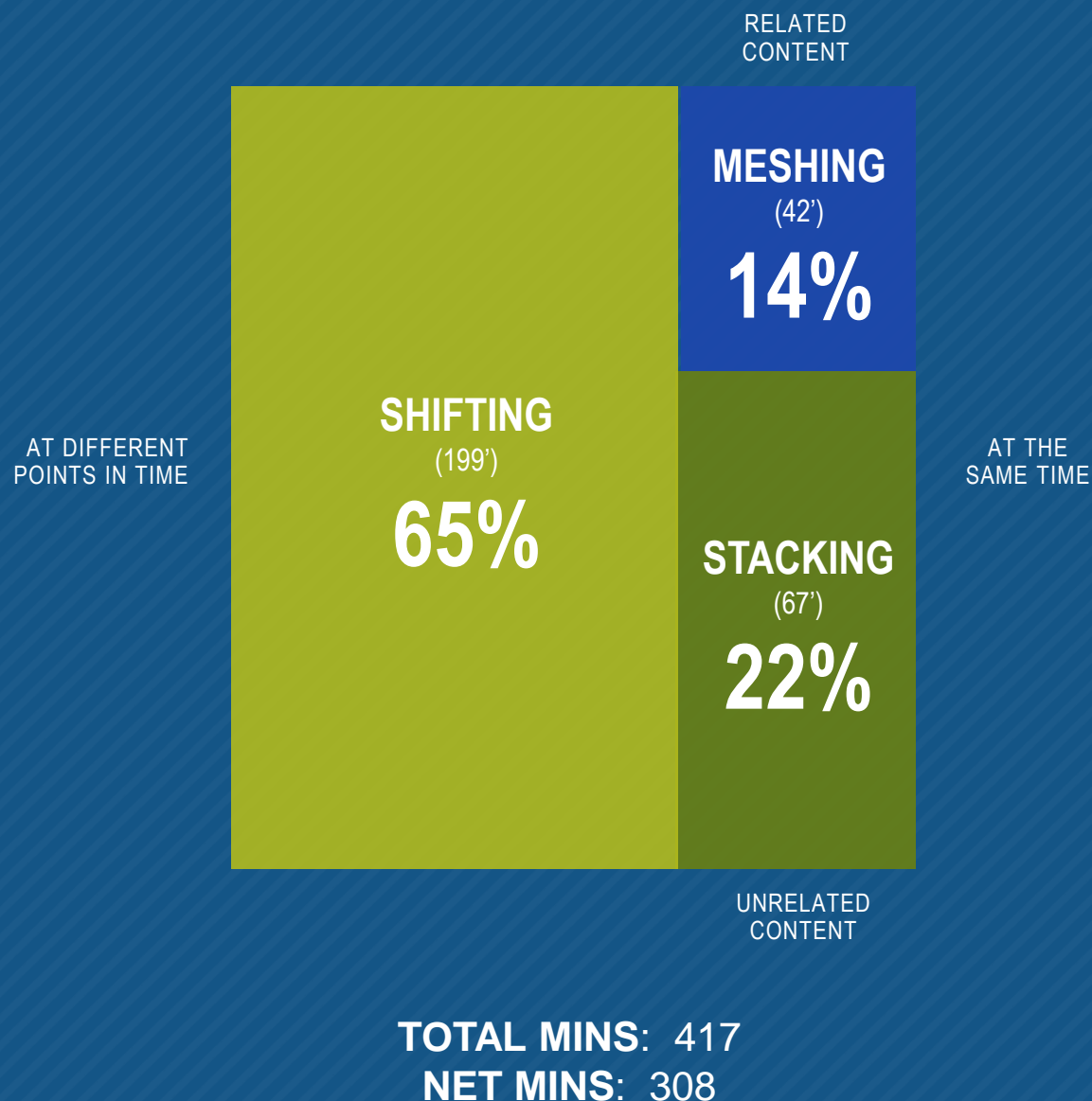
HOW MULTISCREEN MINUTES COMPARE ACROSS COUNTRIES

Meshing and stacking behaviors vary significantly by country.

Thailand meshes the most globally; U.S. stacks the most.

Italians are least likely to use screens simultaneously.
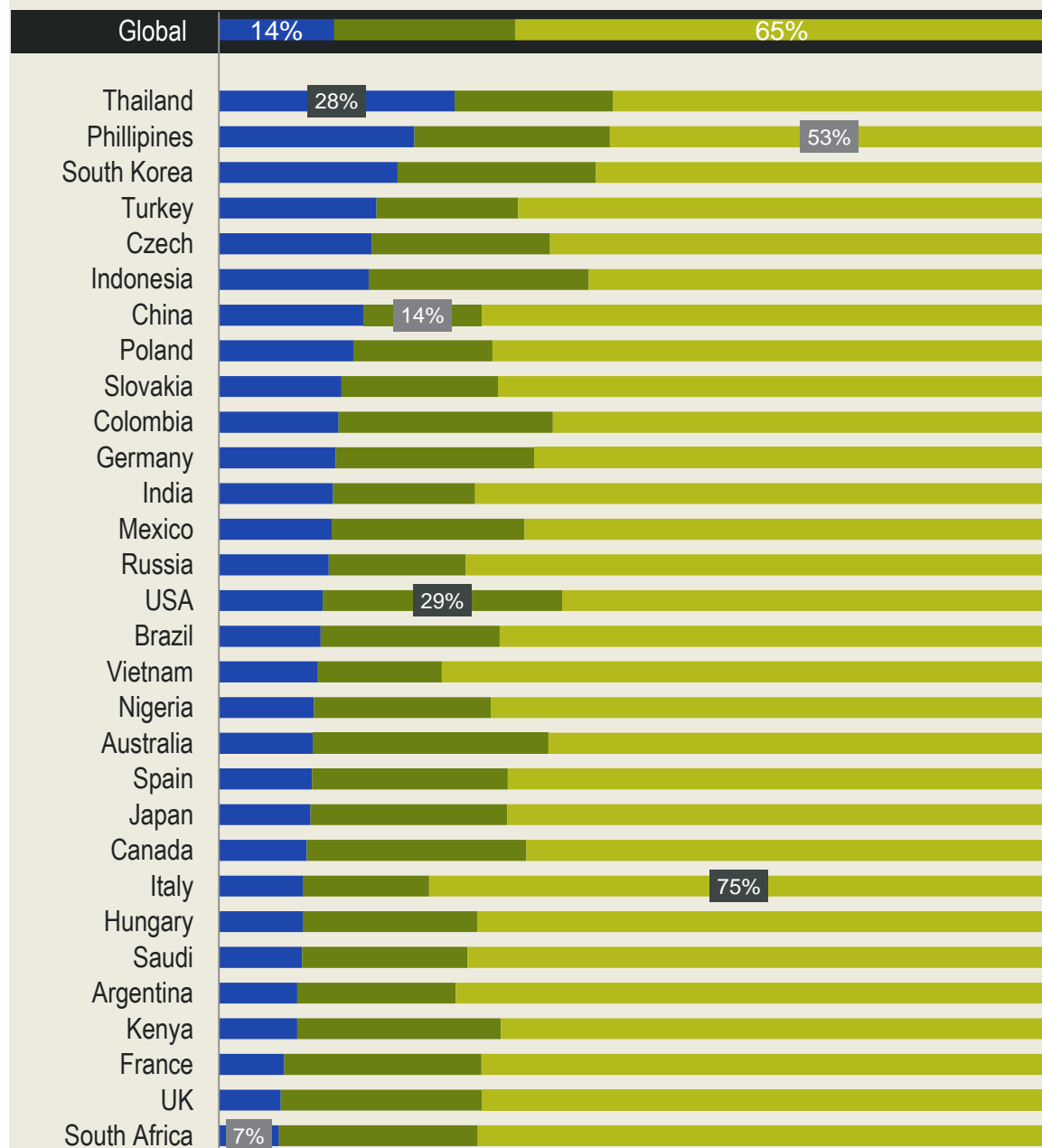
Usage Key

MESHING	STACKING	SHIFTING

Simultaneous: *At the same time as you were watching TV yesterday, how much time did you also spend using the Internet*
Meshing: *While you were watching TV and using the Internet yesterday, how much of the time were you doing something related to what was happening on TV?*
Stacking = *Simultaneous minutes minus meshing minutes*

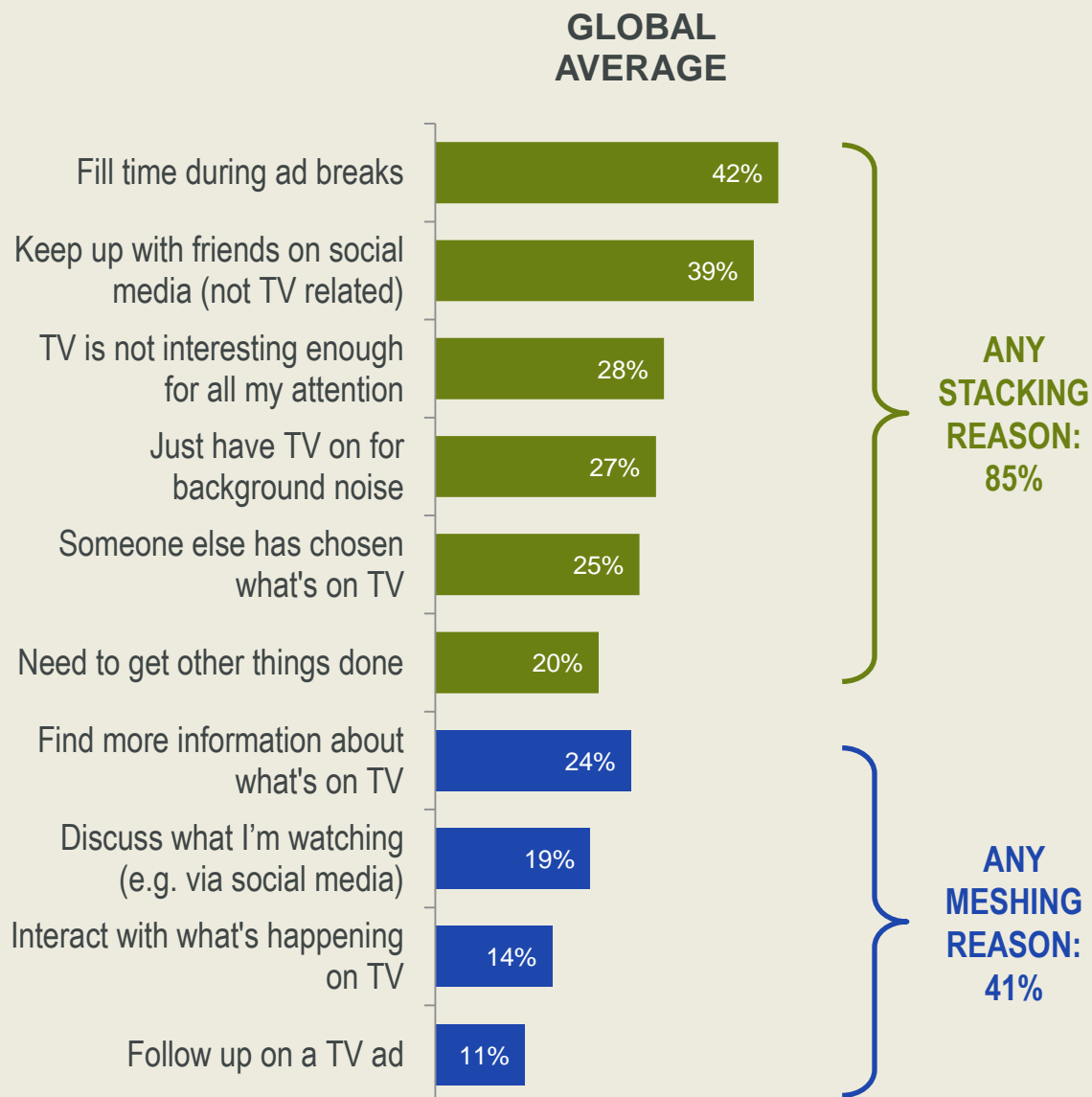| Country	Meshing	Stacking	Shifting
Global	14%		65%
Thailand	28%		
Phillipines			53%
South Korea			
Turkey			
Czech			
Indonesia			
China	14%		
Poland			
Slovakia			
Colombia			
Germany			
India			
Mexico			
Russia			
USA	29%		
Brazil			
Vietnam			
Nigeria			
Australia			
Spain			
Japan			
Canada			
Italy			75%
Hungary			
Saudi			
Argentina			
Kenya			
France			
UK			
South Africa	7%		

REASONS FOR SIMULTANEOUS MULTISCREENING

Social media stacking is the multiscreen equivalent of putting the kettle on. TV is also often being viewed partially/ passively. There are less reasons for people to mesh; more information is the main one. These reasons are fairly universal, with limited variation by country or region.

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

GLOBAL AVERAGE

Reason	%
Fill time during ad breaks	42%
Keep up with friends on social media (not TV related)	39%
TV is not interesting enough for all my attention	28%
Just have TV on for background noise	27%
Someone else has chosen what's on TV	25%
Need to get other things done	20%

ANY STACKING REASON: 85%

Reason	%
Find more information about what's on TV	24%
Discuss what I'm watching (e.g. via social media)	19%
Interact with what's happening on TV	14%
Follow up on a TV ad	11%

ANY MESHING REASON: 41%

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WHY PEOPLE USE MULTIPLE SCREENS

There are many reasons for multiscreening.

Some people will focus mainly on the TV and fill downtime (ad breaks etc.) with digital distractions.

Other people may focus primarily on a digital device, and delays on this device will drive attention to the TV.

Although meshing moments happen less often, they can clearly be very stimulating and involving when they do occur.

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

"To reduce squabbles when other family members are watching a different TV program from what I prefer." Kenya

"It keeps me up to date on latest trends and gives me topics to talk about in my status updates." South Africa

"Using multiscreens actually helps me get things done simultaneously. I only need to watch TV for important scenes." Korea

"For further information when I only have incomplete knowledge available." Germany

"I mainly have the TV on for my son and I go on my phone." Australia

"When my phone is loading, I can watch TV. During TV ads, I can use my phone. I take advantage of all the time." China

"I enjoy social media interaction. Tweeting about a TV programme makes you more involved." UK

"I can talk to my friends while watching TV. I can also fill the down time by gaining more information on the program or ad that I am watching." Philippines

HOW DO SCREENS INTERACT?

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SIMULTANEOUS AND EXCLUSIVE USE BY DEVICE

Due to highest overall viewing, smartphones are most likely to be used both simultaneously with TV, and standalone.

Laptops are proportionately most likely to be used exclusively.

Tablets are proportionately most likely to be used alongside TV.
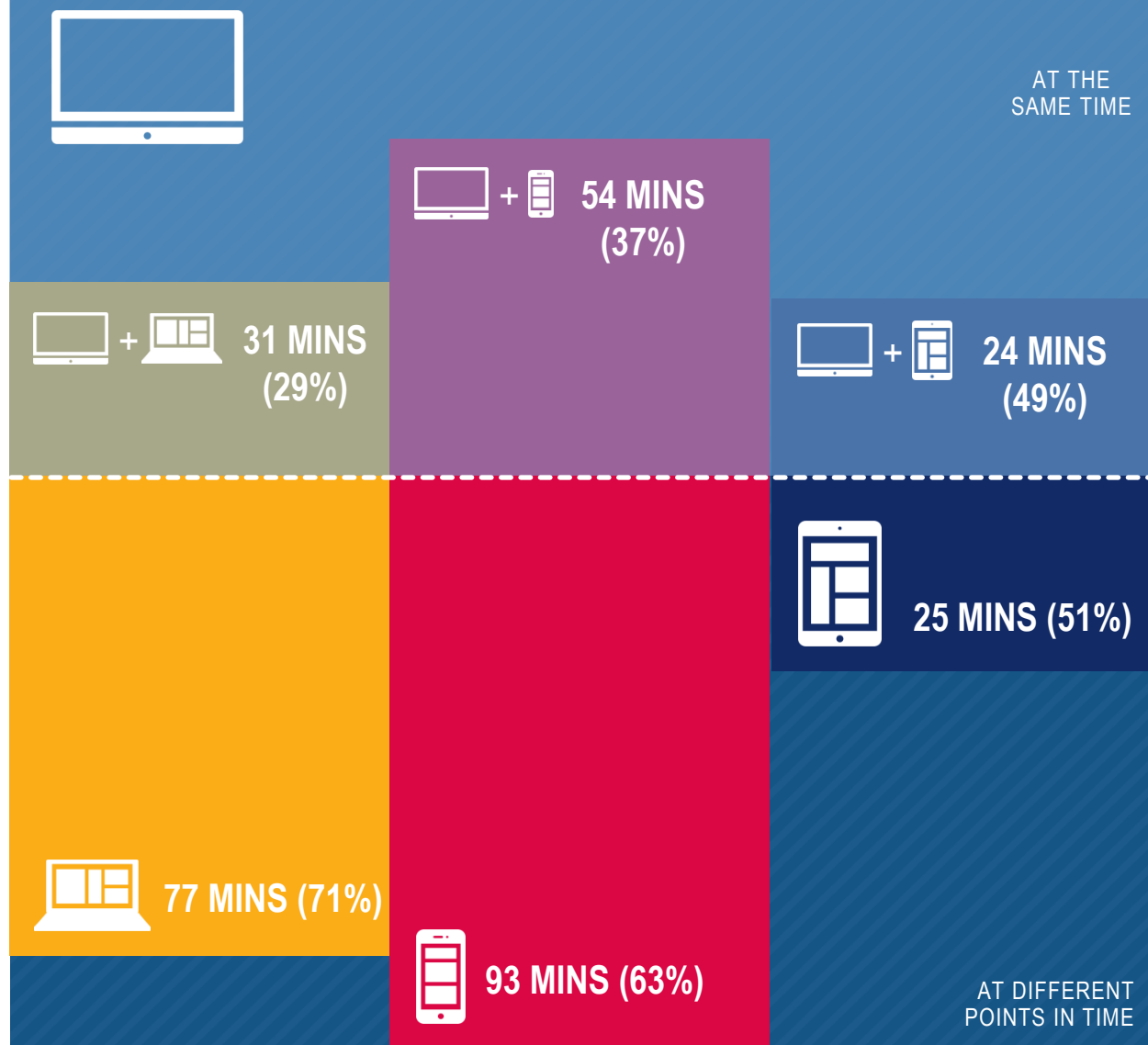
Device Key

TV　　Laptop　　Smartphone　　Tablet

AT THE SAME TIME

+ 54 MINS (37%)

+ 31 MINS (29%)

+ 24 MINS (49%)

25 MINS (51%)

77 MINS (71%)

93 MINS (63%)

AT DIFFERENT POINTS IN TIME

SEQUENCES OF SCREEN SHIFTING (RELATED CONTENT)

Globally, TV is the most common starting point and digital screens are more common continuations.

However, many tasks also start on digital devices, and some tasks can be continued on TV (e.g. online ads driving TV show viewing).

Smartphones are the most common continuation vehicle in all countries except Czech Republic, France, Japan, Poland, Russia and Slovakia, where laptops edge out phones.

GLOBAL AVERAGES	TV	LAPTOP	SMART-PHONE	TABLET
NET (ANY START %)	57	28	33	13
NET (ANY CONTINUE %)	25	40	50	25

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)

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SEQUENCES OF SCREEN SHIFTING (RELATED CONTENT)

The most common individual sequence is seeing something on TV and following up with an activity on a smartphone. This holds true in all regions and countries globally except China, France, Poland and Russia, where TV most often sparks laptop follow up.

Smartphones and laptops clearly operate as partner devices for many people.

START ON → CONTINUE ON (%) ↓	TV	LAPTOP	SMARTPHONE	TABLET
TV	-	11	15	5
LAPTOP	**25**	-	**19**	6
SMARTPHONE	**37**	**17**	-	6
TABLET	14	9	9	-

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)

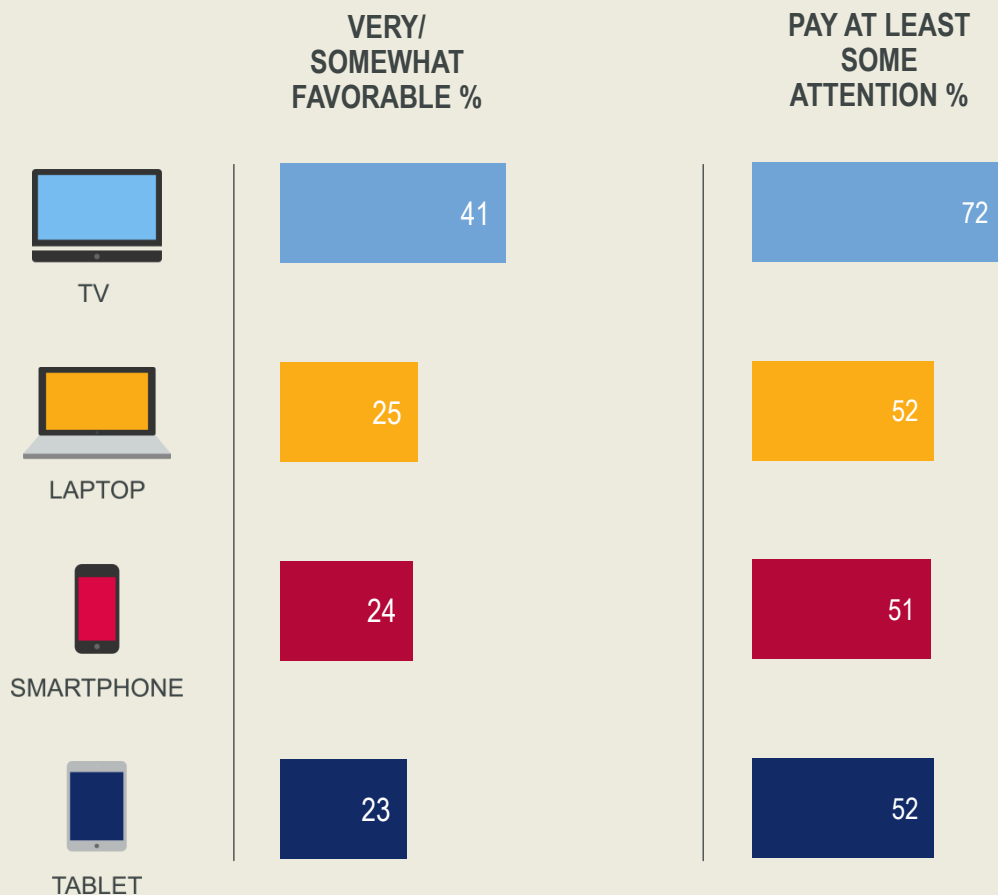WHAT DO PEOPLE THINK OF MULTISCREEN MARKETING?

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AD RECEPTIVITY BY SCREEN (FAVORABILITY AND ATTENTION)

Overall, TV advertising is the more well received, while digital ad receptivity is lower across devices.

This story applies equally to both components of receptivity: favorability and attention.

	VERY/ SOMEWHAT FAVORABLE %	PAY AT LEAST SOME ATTENTION %
TV	41	72
LAPTOP	25	52
SMARTPHONE	24	51
TABLET	23	52

BASE: ALL ANSWERING   BASE: OWN OR HAVE ACCESS TO DEVICE

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.*
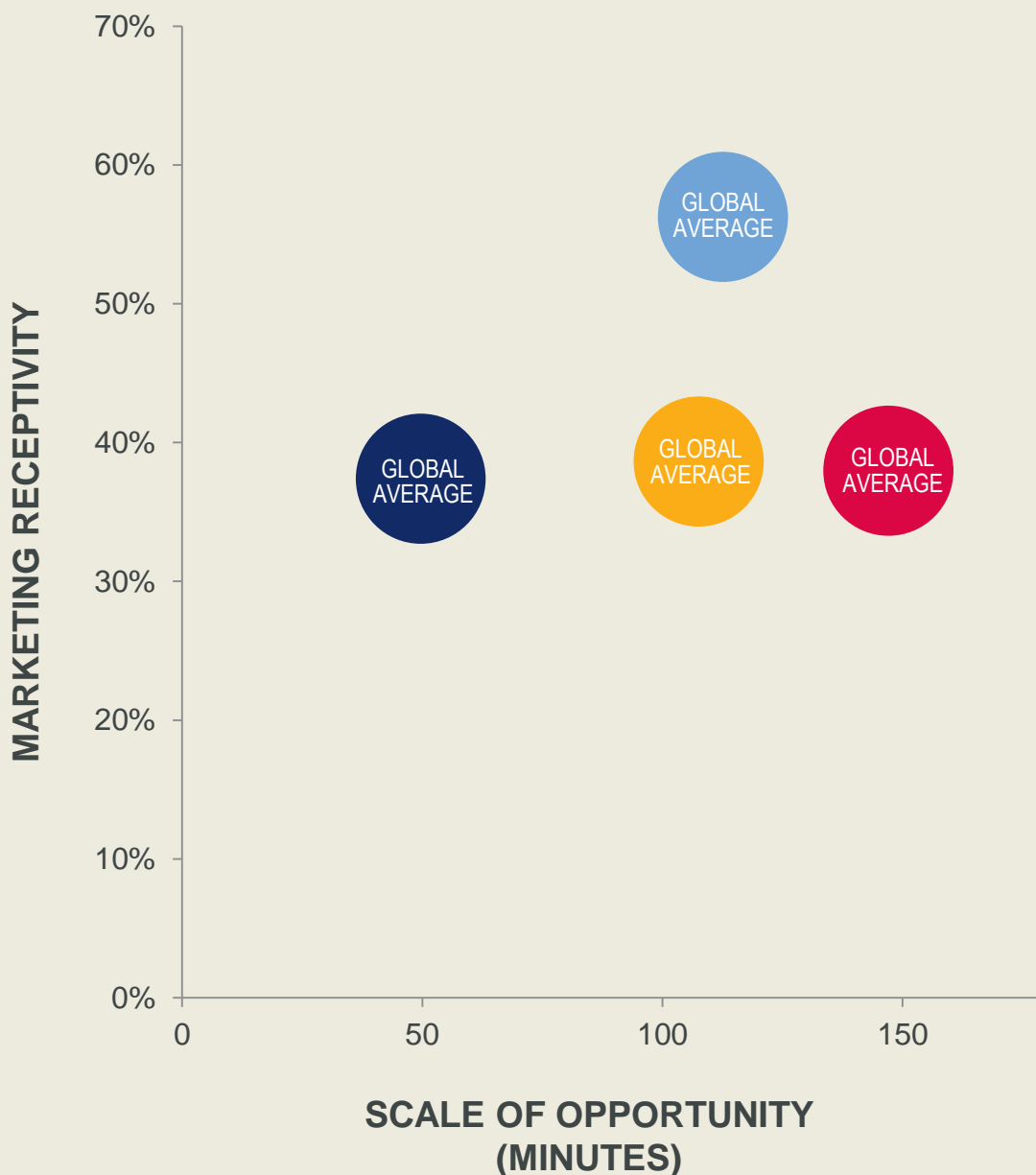
23

MULTISCREEN OPPORTUNITY PLOT – SCREENS

Combining receptivity with screen time shows that TV remains the largest media opportunity due to highest overall receptivity and still strong minutes.

Collectively, Digital still adds up to a huge opportunity (bigger than TV) if low receptivity challenges can be overcome.

Device Key
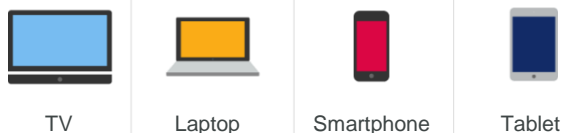
TV	Laptop	Smartphone	Tablet

Scale of opportunity = minutes per device.
Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)

24

MARKETING RECEPTIVITY

70%

60%   GLOBAL AVERAGE

50%

40%   GLOBAL AVERAGE   GLOBAL AVERAGE   GLOBAL AVERAGE

30%

20%

10%

0%

0   50   100   150

SCALE OF OPPORTUNITY (MINUTES)

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HOW RECEPTIVITY COMPARES ACROSS COUNTRIES

On the whole, receptivity rises and falls for all media by country.

Nigerians and Kenyans are most positive to ads generally, while receptivity is lowest overall in France.
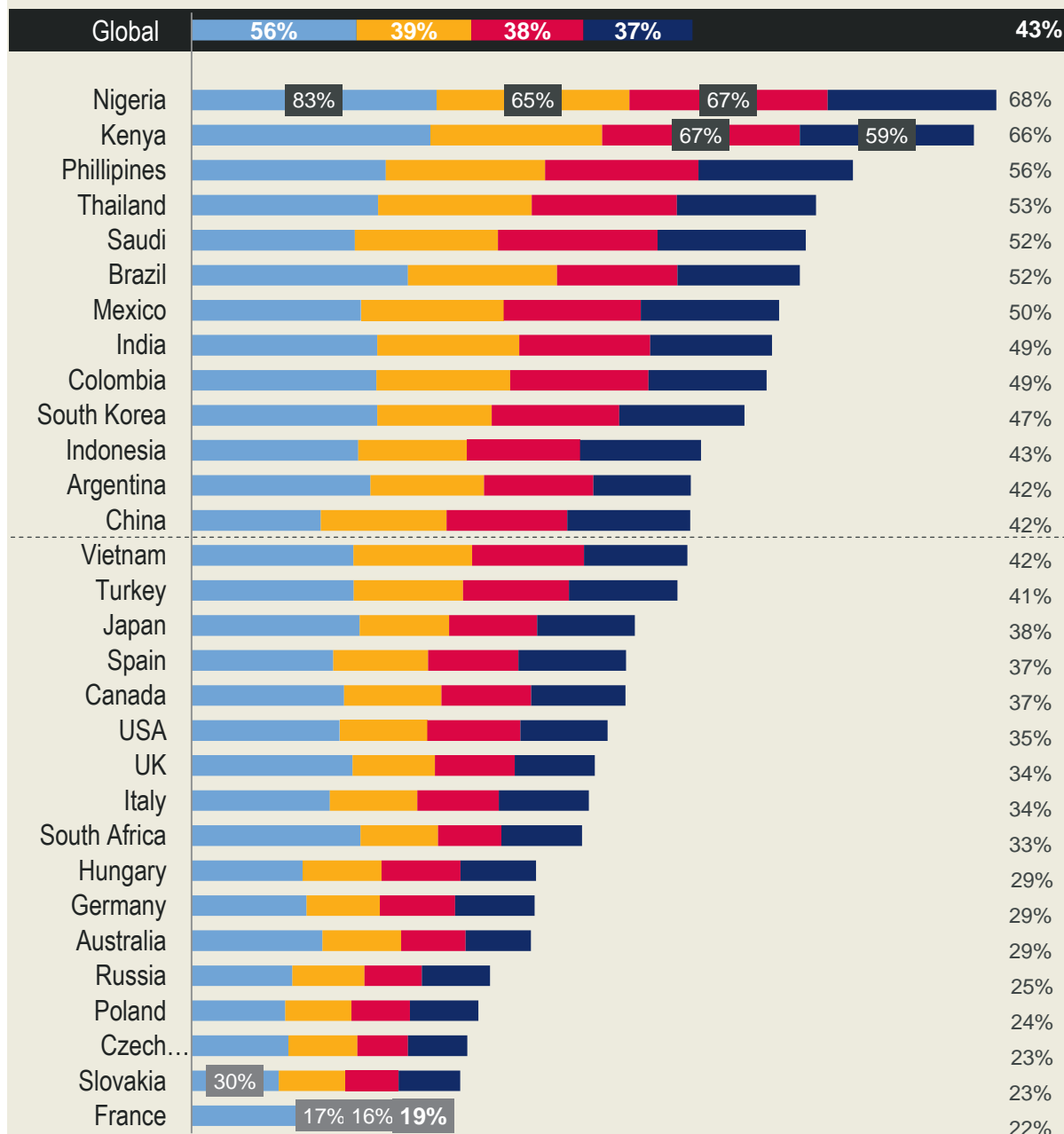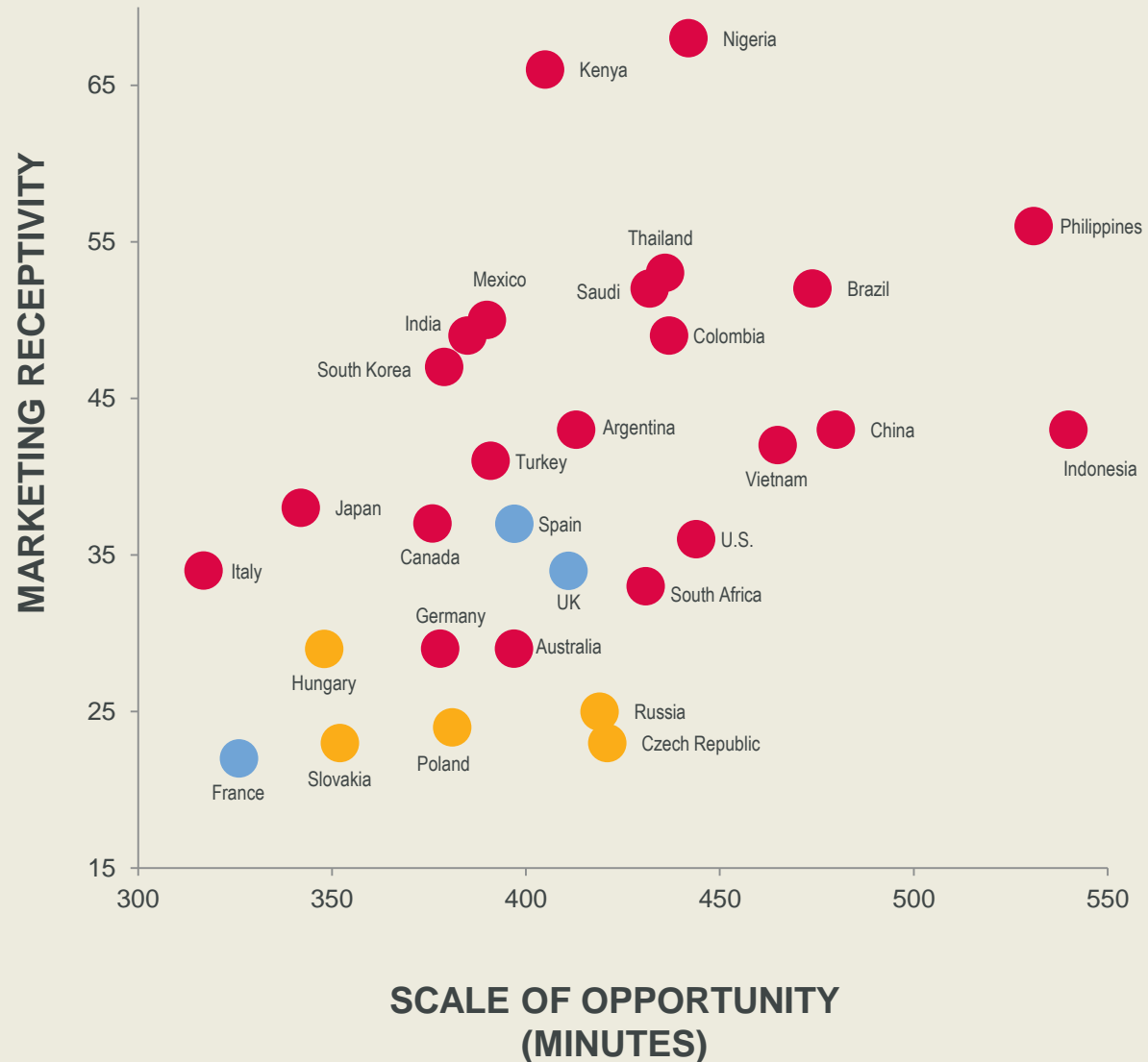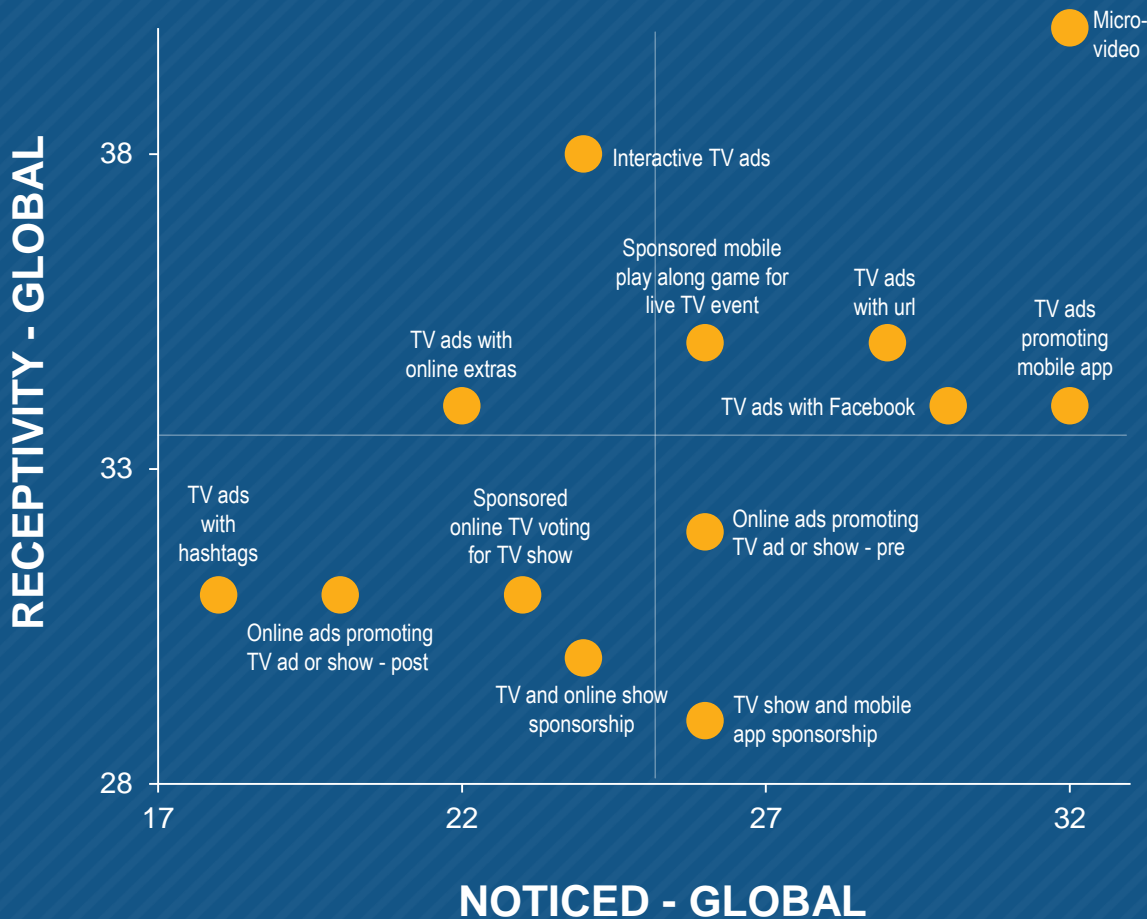
Device Key

TV	Laptop	Smartphone	Tablet

Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)

Country	TV	Laptop	Smartphone	Tablet	Total
Global	56%	39%	38%	37%	43%
Nigeria	83%	65%	67%		68%
Kenya			67%	59%	66%
Phillipines					56%
Thailand					53%
Saudi					52%
Brazil					52%
Mexico					50%
India					49%
Colombia					49%
South Korea					47%
Indonesia					43%
Argentina					42%
China					42%
Vietnam					42%
Turkey					41%
Japan					38%
Spain					37%
Canada					37%
USA					35%
UK					34%
Italy					34%
South Africa					33%
Hungary					29%
Germany					29%
Australia					29%
Russia					25%
Poland					24%
Czech…					23%
Slovakia	30%				23%
France	17%	16%	19%		22%

25

MULTISCREEN OPPORTUNITY PLOT – COUNTRIES

Combining receptivity with screen time shows the varying screen opportunities around the world.

Among multiscreen consumers, overall marketing potential is highest in Asia, Africa and Latin America.

Marketers in North America and Europe face a tougher challenge.

Device Key

| TV | Laptop | Smartphone | Tablet |

Scale of opportunity = minutes per device.
Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)
Color coding indicates the media with highest minutes in that country.

SCALE OF OPPORTUNITY (MINUTES)

MARKETING RECEPTIVITY

Countries plotted: Nigeria, Kenya, Philippines, Thailand, Mexico, Saudi, Brazil, India, Colombia, South Korea, Argentina, China, Turkey, Vietnam, Indonesia, Japan, Spain, Canada, U.S., Italy, UK, South Africa, Germany, Australia, Hungary, Russia, Czech Republic, Slovakia, Poland, France

MULTISCREEN OPPORTUNITY PLOT – MARKETING APPROACHES

Globally, micro-video is the most familiar and popular marketing format. This suggests that multinational marketers should invest here to develop bite-sized content that 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.

RECEPTIVITY - GLOBAL

NOTICED - GLOBAL

- Micro-video
- Interactive TV ads
- Sponsored mobile play along game for live TV event
- TV ads with url
- TV ads promoting mobile app
- TV ads with online extras
- TV ads with Facebook
- TV ads with hashtags
- Sponsored online TV voting for TV show
- Online ads promoting TV ad or show - pre
- Online ads promoting TV ad or show - post
- TV and online show sponsorship
- TV show and mobile app sponsorship

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)

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SCREEN ROLES (MEDIUM AS MESSAGE)

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

Globally, we see that TV ads are most associated with salience, love and meeting needs, but digital ads on all devices help brands be seen as different.
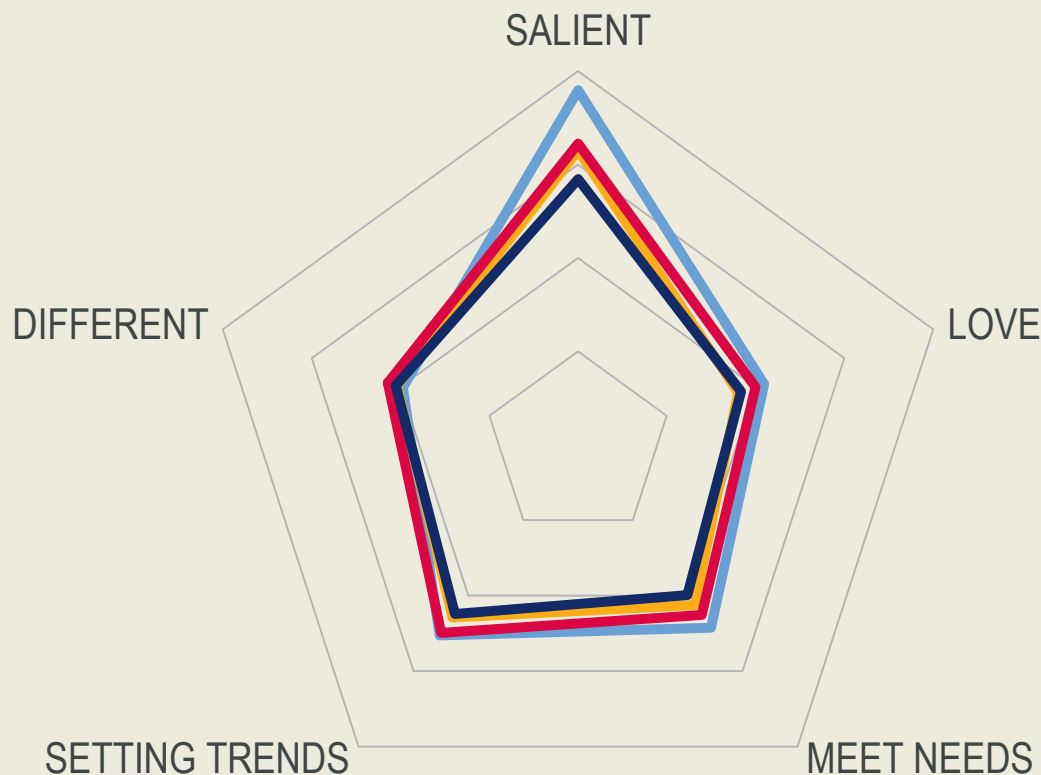
Device Key

TV	Laptop	Smartphone	Tablet

GLOBAL AVERAGE

SALIENT

LOVE

MEET NEEDS

SETTING TRENDS

DIFFERENT

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

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EACH DIGITAL DEVICE CAN PLAY MULTIPLE ROLES, BUT HAS A "SWEET SPOT" FOR MULTISCREEN EXPERIENCES

Smartphone

Default Device

"Do it all" device if you don't have laptop/tablet with you

Stacking
social check-ins

Meshing
polls; sharing opinions via social; messaging

Shifting
further digging on the move

Source: Firefly MillwardBrown; Consumer qualitative – U.S. only

Laptop

Productivity Tool

Faster for lots of content; Better for online shopping

Stacking
getting work done; searching

Meshing
detailed digging into TV content

Shifting
tasks where you need to be fully engaged

Tablet

Entertainment Tool

Great for content in transit

Stacking
alternative entertainment when bored by TV

Meshing
additional video content (e.g. behind the scenes)

Shifting
extensions of the TV content experience

IMPACT PER PERSON REACHED

We see variations in media performance across campaign objectives. This implies an opportunity to use the four screens as a portfolio delivering a rebalanced mix of effects.

The observed differences are most likely due to variation in media engagement driven by clutter and degree of "lean-forwardness." We believe this to favor (more consistently) smartphones and tablets over laptops and TV.

Device Key

TV	Laptop	Smartphone	Tablet

	TV	Laptop	Smartphone	Tablet
SALIENCE	★★★★★	★★	★★★★	★★★★
MEANINGFUL DIFFERENCE (MESSAGE)	★★★★	★★☆	★★★★★	★★★★★
MOTIVATION (PURCHASE INTENT)	★★★☆	★★★☆	★★★★★	★★★★★

Source: Qualitative summary of learning from Millward Brown CrossMedia database (250 studies) and Millward Brown Marketnorms AdIndex database (1,968 online campaigns and 317 mobile campaigns through Q4-13)

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ONLINE AND MOBILE IMPACT

Our MarketNorms® database reveals clear evidence of mobile campaigns having greater brand impact than online campaigns, on average. This may partly be due to a novelty effect, but the lack of clutter is also likely playing a role.

Early data indicates that this applies equally to smartphones and tablets, although smartphones seem particularly strong for lower funnel metrics.
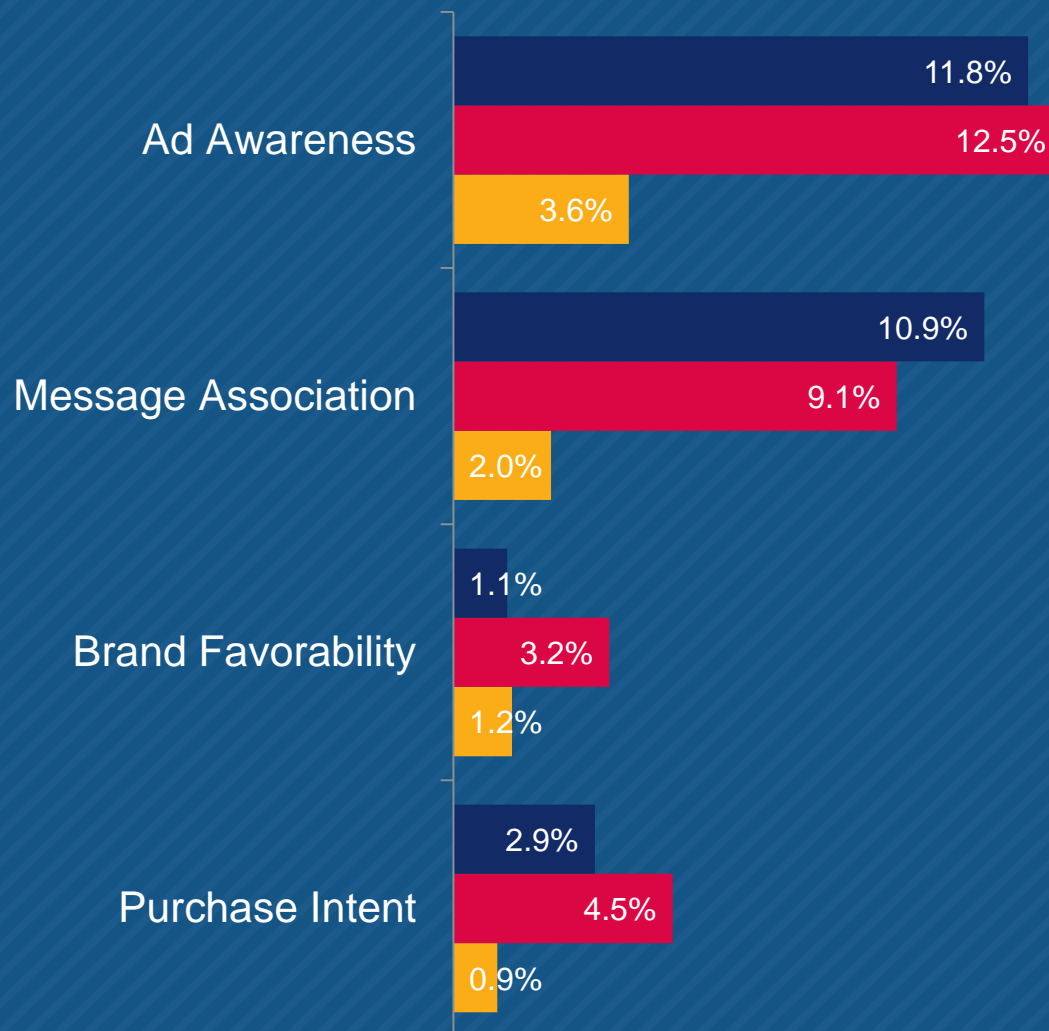
Device Key

| Laptop | Smartphone | Tablet |

BRAND IMPACT
(DIFFERENCE BETWEEN CONTROL AND EXPOSED GROUPS)

Ad Awareness
- 11.8%
- 12.5%
- 3.6%

Message Association
- 10.9%
- 9.1%
- 2.0%

Brand Favorability
- 1.1%
- 3.2%
- 1.2%

Purchase Intent
- 2.9%
- 4.5%
- 0.9%

Source: Millward Brown's MarketNorms database (1,968 online campaigns and 317 mobile campaigns through Q4-13)

MULTISCREEN TYPOLOGIES
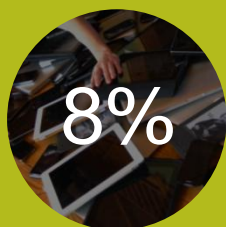
MillwardBrown
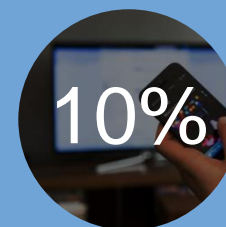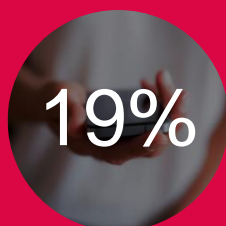
MULTISCREEN OPPORTUNITY PLOT – SEGMENTS

Digital Dynamos and Mega Multiscreeners are the easiest people to target across screens. However, they are only 14% of all multiscreen users combined, so most brands will also need to engage Couch Chatters and Phonistas.

Passivists are comfortably the largest group, but also the hardest to engage.
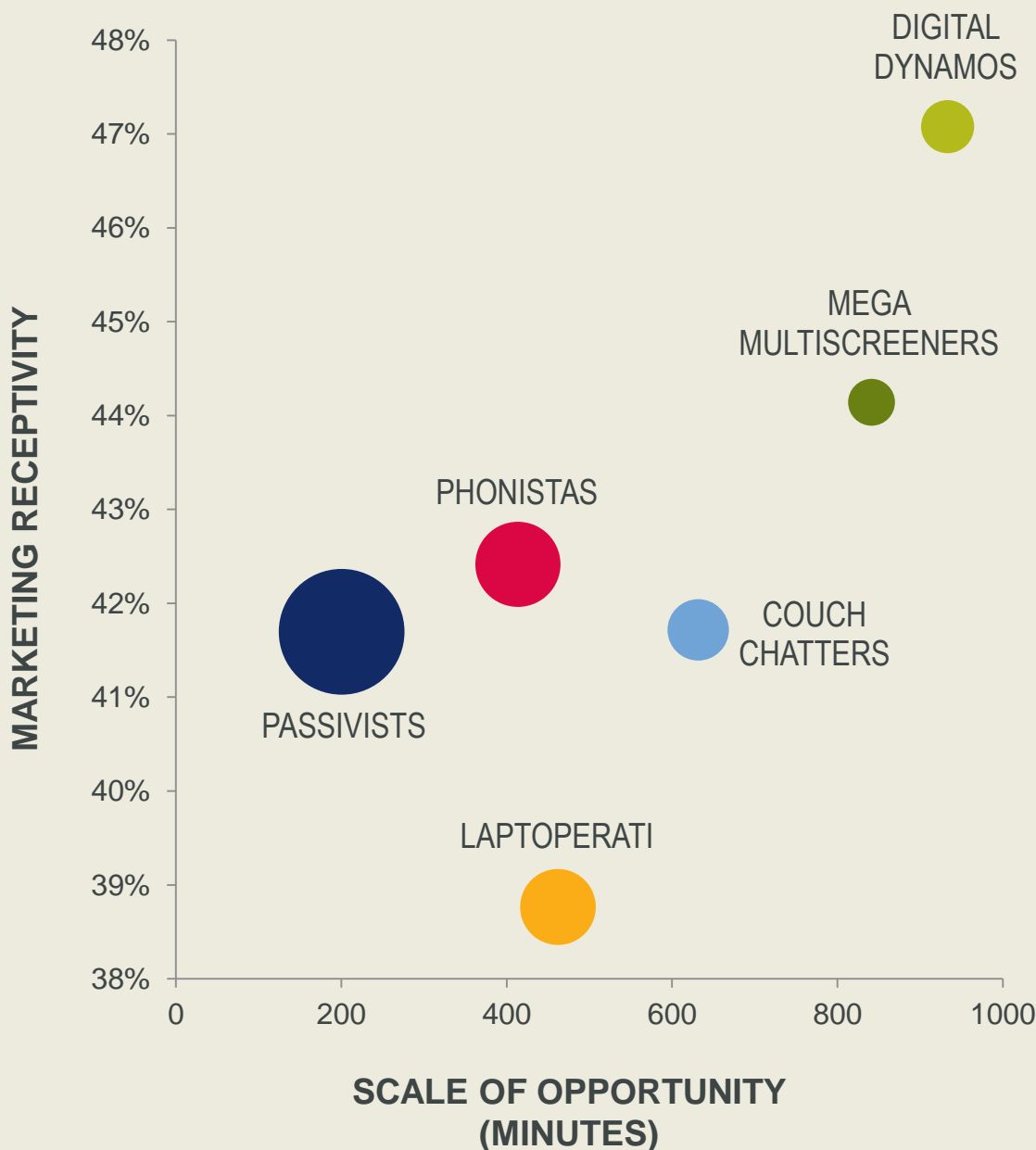
Device Key

TV	Smartphone	Laptop	Tablet

SCALE OF OPPORTUNITY (MINUTES)

MARKETING RECEPTIVITY

Scale of opportunity = minutes per device.
Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)

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DIGITAL DYNAMOS

Digital Dynamos are passionate about all of their digital devices. They can be reached via all kinds of digital and interactive marketing and actively move across devices to follow up on what interests them.

DEFINED BY:

High use of laptop, smartphone AND tablet

More positive towards ads, especially digital

WHO:

Mixed demos

More common in China, Indonesia, Philippines and Vietnam

MOTIVATIONS:

They stack because TV is not interesting

They mesh for more info, to chat about TV via social and to follow up on TV ads

TARGET VIA:

Digital ads and all kinds of interactive multiscreen marketing approaches

Based on respondent-level segmentation analysis.

MEGA MULTISCREENERS

This group watches a lot of TV, but are active across all media. They enjoy engaging across different media and finding ways to follow up on what they have seen on TV.

DEFINED BY:

High use of all media, particularly TV and laptops

Positive towards advertising but less so on mobile

WHO:

Fewer teenagers

More common in U.S., Brazil, Russia and South Korea

MOTIVATIONS:

They more actively mesh in multiple ways (for more info and to engage with and discuss content via social media)

TARGET VIA:

All kinds of TV-out interactive multiscreen marketing approaches (e.g., TV ads w/ hashtags, integrated TV & online sponsorships)

Based on respondent-level segmentation analysis.

COUCH CHATTERS

Despite high TV use, the TV is not grabbing all their attention. This group is spending time doing other things while the TV is on, such as catching up with friends on social media. They are more likely to notice ads with Facebook and mobile app links.

DEFINED BY:

High use of TV and smartphone

Similarly more positive towards TV and phone ads

WHO:

More female

More common in Kenya, Nigeria U.S., UK and Germany

MOTIVATIONS:

They stack to keep up with friends and fill time between ad breaks

TARGET VIA:

TV and phone ads with links to websites, Facebook and mobile apps

Based on respondent-level segmentation analysis.

PHONISTAS

This group uses smartphones more than any other media. This is a younger, more female group who use their phones to keep up with friends socially, but they are also positive towards brands that link TV and mobile.

DEFINED BY:

High use of smartphones

More positive towards phone and TV ads; don't like laptop/tablet ads

WHO:

Younger females

More common in Kenya, Nigeria, Saudi Arabia, Argentina and India

MOTIVATIONS:

They stack to keep up with friends

They're not particularly busy

TARGET VIA:

TV ads promoting mobile apps

Integrated sponsorships of TV show and app

Based on respondent-level segmentation analysis.

LAPTOPERATI

A more male group that makes the most use of their laptops/PCs. They are not receptive to advertising in general, but may notice ads more that have links to a brand's website, where they are more likely to share brand videos with friends.

DEFINED BY:

High use of laptop

Dislike all ads, except those on laptop

WHO:

More men

Most common in Russia, but also Vietnam, Saudi Arabia, Brazil and China

MOTIVATIONS:

Often stack because they don't find TV particularly interesting

Occasionally mesh for more info about TV

TARGET VIA:

Primarily laptop ads, but also micro-video and TV ads with web URLs

Based on respondent-level segmentation analysis.

PASSIVISTS

This large group have very low overall screen media use and are therefore particularly difficult to target. They are not digitally minded and are unlikely to be reached via any screen other than TV. They may be easier to target via offline media (print, outdoor, radio). A helpful reminder that screens don't operate in isolation.

DEFINED BY:

Lowest overall use of all screen media

Don't particularly care about ads at all

WHO:

Over 35, slightly more men

More common in France, Italy, Germany and Canada

MOTIVATIONS:

They are very unlikely to mesh or stack; they rarely watch TV; and rarely use multiple devices

TARGET VIA:

Non-screen media

Perhaps TV

NOT multiscreen approaches

Based on respondent-level segmentation analysis.

WHAT SHOULD BRANDS DO?

BE CONSISTENT

The biggest multiscreen opportunity is not simultaneous connections between screens, but rather, a consistent presence across screens, whenever and wherever someone chooses to engage with your brand.

Pepsi's "Get Hyped for Half Time" was a successful, month-long multiscreen campaign which culminated in their sponsorship of the Super Bowl's half time show.

The campaign started with PR around a concert set in the town of Milligan, NE in the middle of America.

Activities continued throughout January including a viral video during the Grammys, and multiple tweets & Vines.

GET HYPED FOR HALF TIME

pepsi HALFTIME SHOW

#HALFTIME

Their Super Bowl commercial acted as an intro to the half time show — a celebration of music and New York City.

In the hour after the commercial ran, it generated the largest increase in website traffic of any Super Bowl advertiser.

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BE CONNECTED

New multiscreen behaviors offer exciting opportunities for interactions between screens. Although not all brands will be able to achieve this, second screen play-alongs can be highly popular.
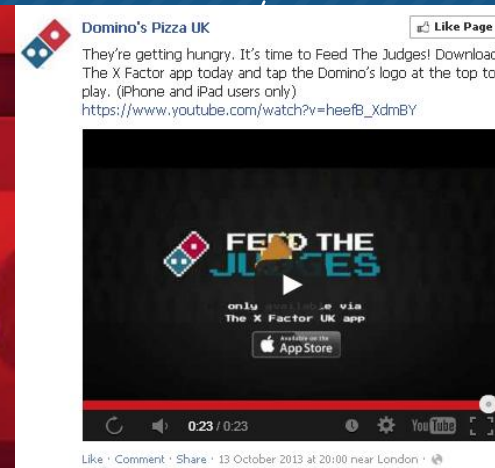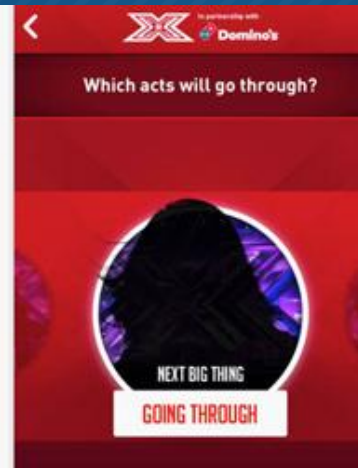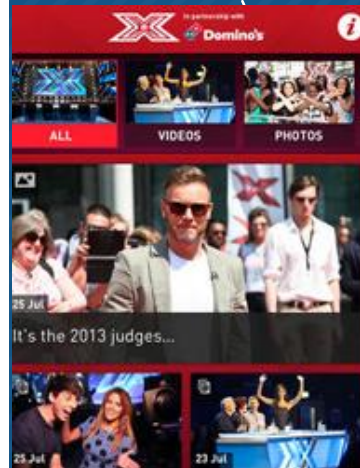
The Domino's X Factor app offers a roadmap for meshing success.

Not only was the app genuinely integrated with the show (users became the 5th judge on the show), it was well executed – and you could even order a pizza directly from the app!

Describe a positive experience you have had with the same brand across multiple screens. What was the brand, and what did they do that you liked?

"The Domino's logo was on TV and the app. It made me get one and I love them – it was a good excuse to treat myself!"

"Domino's advertised on TV and on the X Factor app. It's brilliant when you use the app alongside the show."

Domino's Pizza UK

They're getting hungry. It's time to Feed The Judges! Download The X Factor app today and tap the Domino's logo at the top to play. (iPhone and iPad users only)
https://www.youtube.com/watch?v=heefB_XdmBY

FEED THE JUDGES
only available via
The X Factor UK app
App Store

0:23 / 0:23

Like · Comment · Share · 13 October 2013 at 20:00 near London ·

"Domino's adverts on X Factor made me more interested in their products."
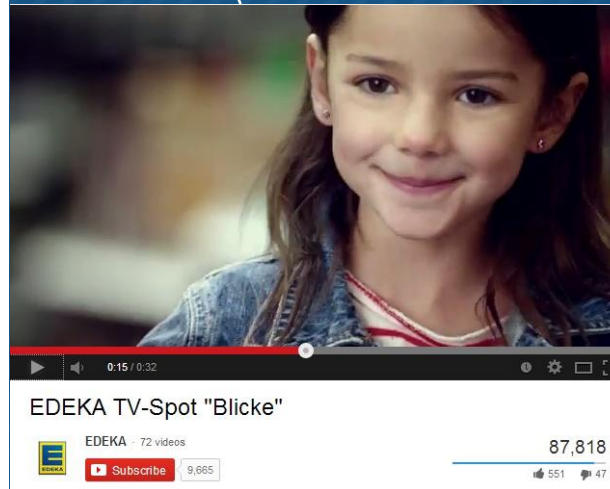
"I liked that Domino's was on TV and on the X Factor app at the same time. They also had a game too."

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BE CONSIDERED

All screens can achieve all brand-building tasks, but different screens do imply certain attributes and can play specific roles. Let these starting assumptions work to your advantage.

Edeka, a German supermarket, used two very different creative approaches to promote the variety of their own-brand products. The TV ad features children in a supermarket and is clearly aimed at a more conservative, family-focused demographic. The wacky online and viral elements are targeted at a younger, more fun-loving audience.

Edeka ran a cute, but "safe," TV ad featuring the variety of their own-brand products.

A much riskier, but memorable, "Supergeil" ad ran online – also featuring their own-brand products.

EDEKA TV-Spot "Blicke"
EDEKA · 72 videos   87,818
Subscribe 9,665   551   47

EDEKA Supergeil (feat. Friedrich Liechtenstein)
EDEKA · 72 videos   5,912,228
Subscribe 9,665   62,979   1,905

The TV ad achieved relatively few views online.

Supergeil has become a viral hit and spawned further digital elements.

BE CONCISE

Think carefully about how to overcome resistance to ads on digital screens. Use mobile-friendly, shareable content that entertains first, informs second.

Vivo, a Brazilian telecom brand, launched a TV and social media campaign to concisely promote its benefit of good network connectivity.

The brand used #pegabem (which means "it`s wonderful, it`s good") and asked consumers to post good moments of their lives with this hashtag.

Describe a positive experience you have had with the same brand across multiple screens. What was the brand, and what did they do that you liked?

"Vivo's television advertising is super funny, and they have very cool ads in social networks."

Their TV commercial encouraged people to share good moments of their lives.

Uploads were shared online with Vivo's 2 million Facebook fans and on other social platforms.

The #pegabem posts were also curated on a dedicated campaign website.

MULTISCREEN = MULTIPARTNER

Millward Brown's qualitative practice Firefly Millward Brown conducted interviews with industry experts alongside this research. One key finding to emerge was the idea that achieving multiscreen success is not just a media planning responsibility.

"There are no experts yet, everyone is learning."

"We all have only partial information."

"Experiences should be accumulated and communicated throughout organizations urgently."

"None of us really know what is going on. Is the opportunity about new targeting approaches, or is it a new event hijacking opportunity?"

MEDIA AGENCIES

Facilitate, orchestrate and be the experts

CREATIVE AGENCIES

Create ideas with multiscreen legs

RESEARCH AGENCIES

Inform, explain, educate and measure

MEDIA OWNERS

Facilitate multiscreen planning activities

BRANDS

Increase confidence, experience and competence

ALL

Integrate, partner, connect and collaborate

firefly
MILLWARD BROWN

INDUSTRY EXPERTS REACT

When exposed to the findings from this study, much of the data made intuitive sense and affirmed existing opinions about the growing importance of mobile and the need for sensitivity when marketing on mobile devices.

Yet the results also contained some surprises. Even though meshing minutes are lower than shifting minutes, some experts still find meshing the most interesting area. They hypothesized that meshing minutes are likely increasing.

"It's not surprising that smartphone minutes are higher than TV minutes among smartphone users. That's the new daily reality."

"Even though it's the lowest number of minutes, the meshing figure is surprisingly high. That's the most interesting area. The dialogue between screens is rich in possibility."

"This is good, relevant and timely information."

"It makes sense that TV ad receptivity is higher. It's surprising that mobile receptivity now matches that of laptops given how personal the device is."

"I'm not surprised that mobile ad favorability is lower. This is why we have developed specific mobile approaches."

"It's good news that the bigger media opportunity is non-simultaneous "shifted" time across multiple devices because this should result in more integrated campaigns using different channels."

Source: Firefly Millward Brown; Qualitative interviews with industry experts in U.S., UK, France, Hungary, Italy and Turkey. Interviews included agency planners and advertisers.

THE VIEWS OF INDUSTRY EXPERTS

Some experts view multiscreen proactively and are trying to capitalize on the opportunity to amplify experiences between brands and consumers.

Others view it more defensively and worry that multiscreen could potentially result in a "lack of attention" for traditional approaches.

Those in the middle are not yet sure if it presents opportunity or threat, but are investigating curiously and adjusting their approaches accordingly.

All agreed that multiscreen behaviors are impacting how they approach their media mix.

Source: Firefly Millward Brown; Qualitative interviews with industry experts in U.S., UK, France, Hungary, Italy and Turkey. Interviews included agency planners and advertisers.

"Don't make it hard for consumers to 'follow' what you're presenting. Make each part of the experience stand on its own. Each of the parts has to tell the whole story."

"Shifted multiscreen behavior is the phenomenon that can most easily be used for daily media planning since it can be planned in advance."

"People are so used to being broadcasted at with TV, the interaction experience doesn't come naturally to them. Make it easy for them to take part."

"There's no funnel any more. It's not linear, people like to bounce around. All of these screens are putting things in front of you that can trigger purchases instead of cueing up the purchase cycle. Brands have got to get out there or they won't be noticed."

"Multiscreening is simply how people are living their lives. Integrated marketing campaigns across Mobile-Internet-TV will make a real difference in terms of how they touch people, generating a deeper impact and creating word-of-mouth effects."

CONTACT US:

www.millwardbrown.com/adreaction

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APPENDIX

SMARTPHONE PENETRATION

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SAMPLE REPRESENTIVITY BY COUNTRY

By conducting AdReaction 2014 among 16-44 year-old multiscreen consumers (people who own or have access to both a TV AND either a smartphone OR tablet), we have deliberately spoken to an advanced sub-group of the overall population.

This smartphone penetration data from Google helps put our audience in context. Among 18-44 year olds, smartphone penetration is higher in the UK than every other market. Hence a relatively "mainstream" UK sample is being compared with a more niche sample from other countries.

Source: Google Our Mobile Planet, 2013.
Penetration among Total Population

%

Country	%
UK	85
Australia	81
Spain	81
Saudi Arabia	76
Canada	75
U.S.	72
China	68
Germany	65
France	65
Italy	62
Russia	53
Mexico	48
Thailand	47
South Africa	47
Argentina	44
Philippines	43
Japan	42
Turkey	40
Brazil	33
Vietnam	25
Indonesia	18
India	15