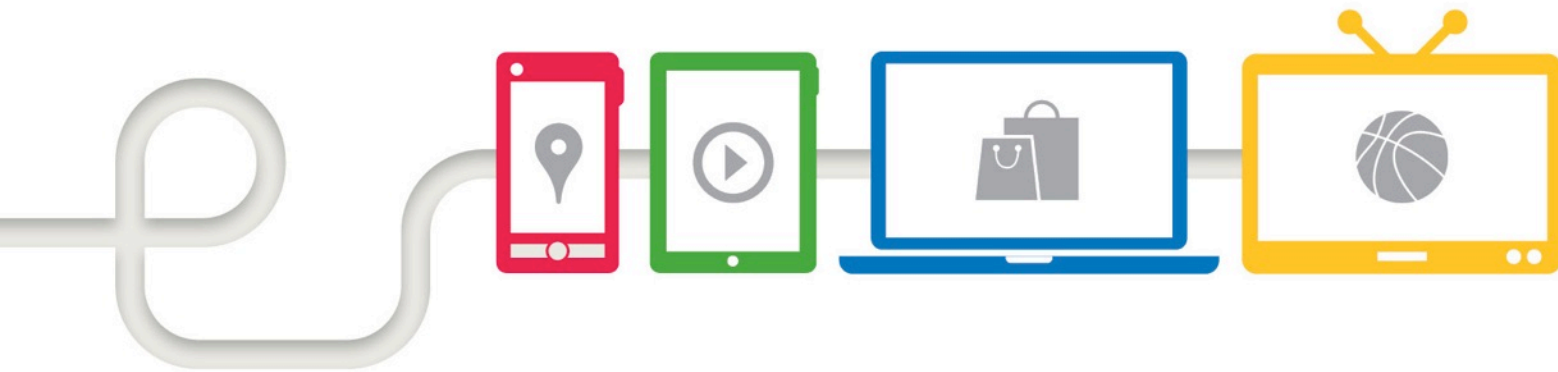




The New Multi-screen World:

Understanding Cross-platform Consumer Behavior



Executive summary

1 We are a nation of **multi-screeners**. Most of consumers' media time today is spent in front of a screen – computer, smartphone, tablet and TV



2 The device we choose to use is often **driven by our context:** where we are, what we want to accomplish and the amount of time needed



3 There are two main modes of multi-screening:
Sequential screening where we move between devices.

Simultaneous screening where we use multiple devices at the same time



4 **TV** no longer commands our full attention as it has become one of the most common devices that is used **simultaneously** with other screens



Executive summary

5 Portable screens allow us to move easily from one device to another to achieve a task. **Search** is the most common bridge between devices in this sequential usage



6 The majority of the times that we use devices simultaneously, our **attention is split** between distinct activities on each device



7 Smartphones are the backbone of our daily media interactions. They have the highest number of user interactions per day and serve as the most common starting point for activities across multiple screens



8 Multiple screens make us feel more efficient because we can act spontaneously and get a sense of accomplishment – this results in a feeling of **“found time”**

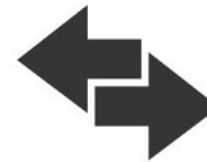


Research objectives

Gain a deep understanding of consumer media behavior over a 24-hour period, specifically with regard to:



How is media used in **daily life**?



How do **activities** on one screen impact another?



What are consumers' motivations in **engaging with media**?



How is **mobile** used in conjunction with other screens?



How are consumers using multiple screens to **accomplish their tasks**?



What is the role of **search** among multiple devices

What did we do?



In partnership with Sterling Brands and Ipsos this research was conducted in two phases:

Qualitative phase: mobile text diaries, online bulletin boards and in-home interviews in LA, Boston and Austin

Quantitative phase:



Participants logged each of their traditional and digital media interactions in a mobile diary over a 24 hour period. A survey probing further into observed behavior was deployed the day following diary participation



Participants were given an online survey to understand attitudes and behaviors associated with various digital activities, specifically when using multiple screens



Agenda

Multi-screen behavior moves mainstream

Putting our devices in context

The two modes of multi-screening

- Sequential usage
- Simultaneous usage

The changing role of television in a multi-screen world

Found time

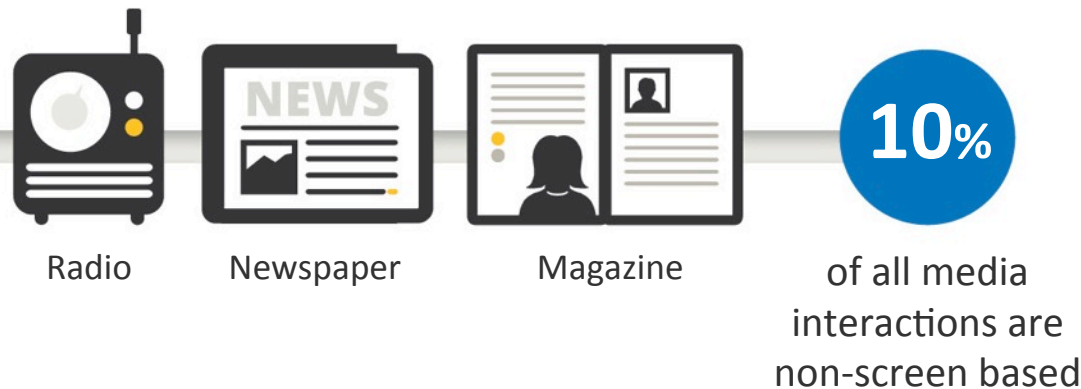
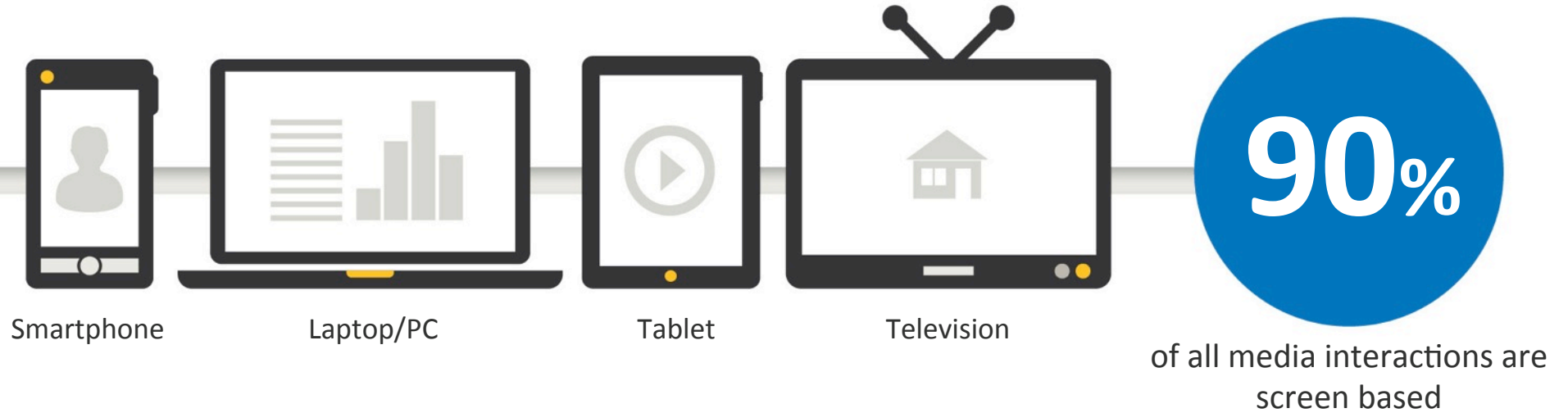
Multi-screen and shopping

Implications for businesses

The new multi-screen world



Majority of our daily media interactions are screen based

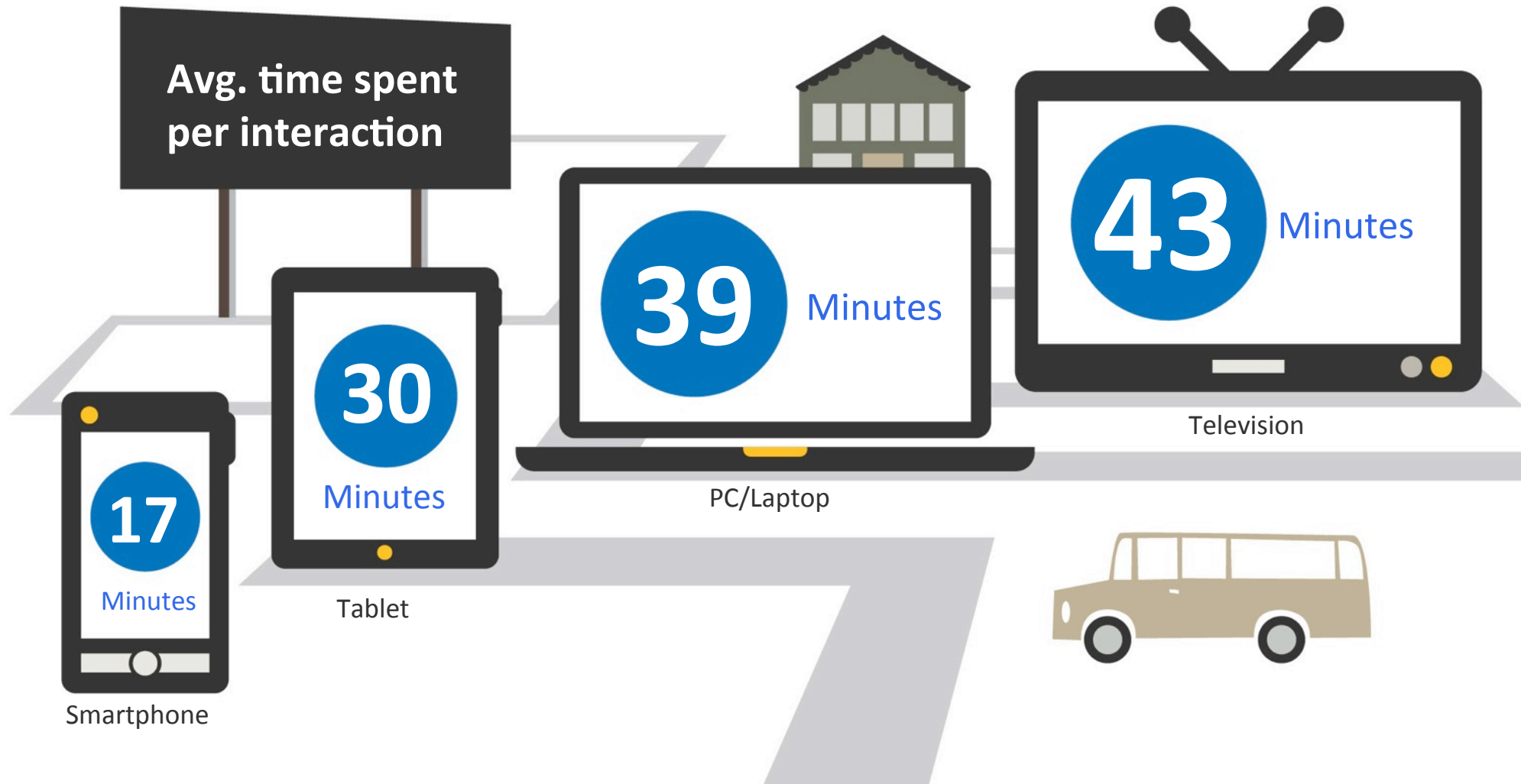


On average we spend

4.4 hours

of our leisure time in front of screens each day

Our time online is spread between 4 primary media devices



Putting our devices in context

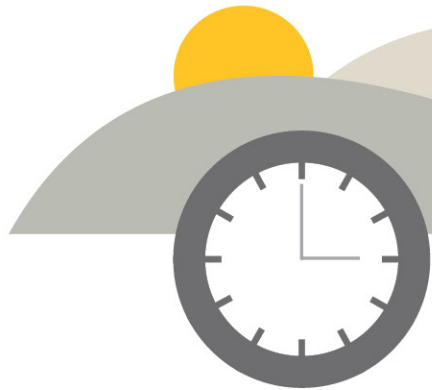


Context drives device choice

Today consumers own multiple devices and move seamlessly between them throughout the day



The device we choose to use at a particular time is often driven by our **context**:



The amount of **time** we have or need



The **goal** we want to accomplish



Our **location**



Our **attitude** and state of mind

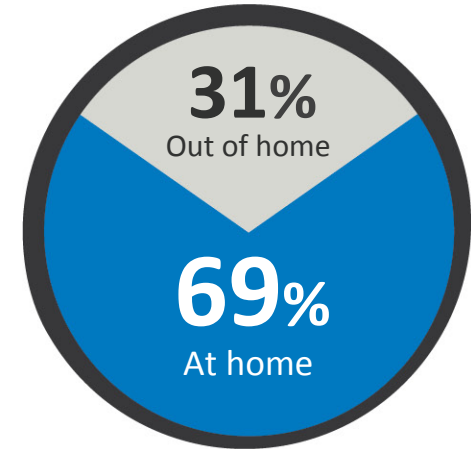
Computers keep us productive and informed

Context:

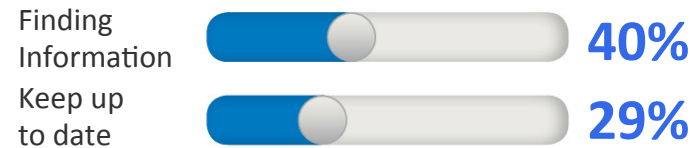
- Office or home use
- Productive, task-oriented
- Requires lots of time & focus
- Serious, research intensive attitude

24%

of our daily media interactions occur on a PC



PC use is motivated by:



Smartphones keep us connected

Context:

- On-the-go as well as at home
- Communicate and connect
- Short bursts of time
- Need info quickly and immediately

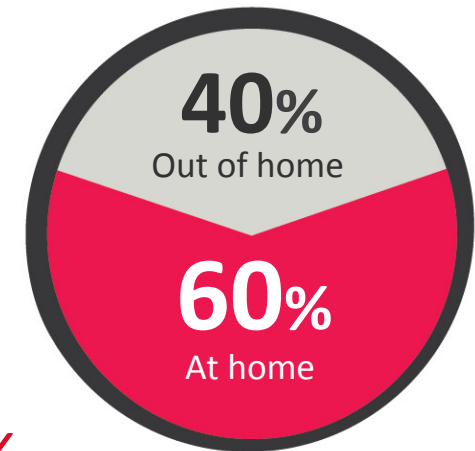
38%

of our daily media interactions occur on a smartphone

Smartphone use is motivated by:

Communication 54%

Entertainment 33%

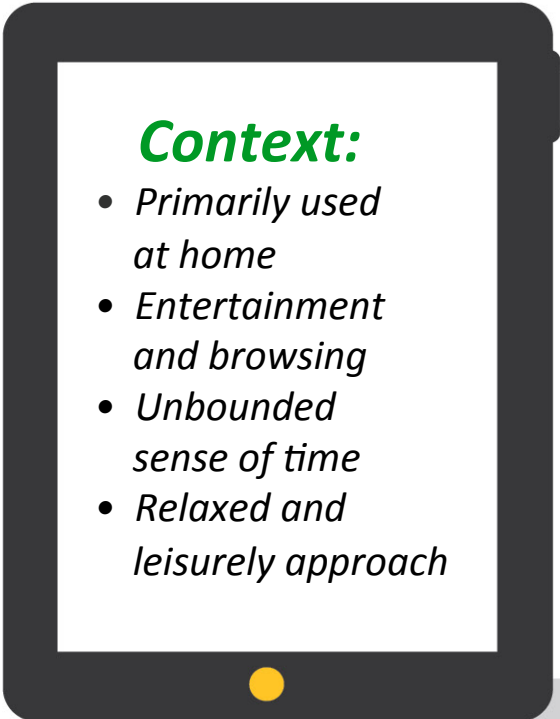
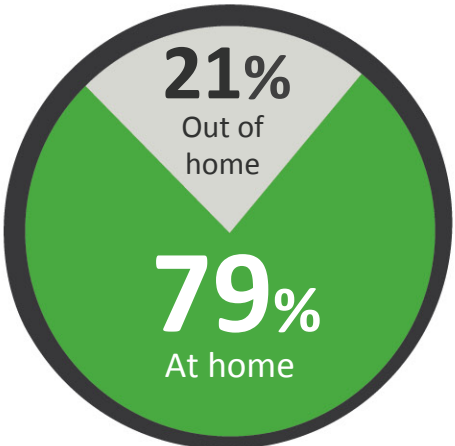


Tablets keep us entertained

Tablet use is motivated by:

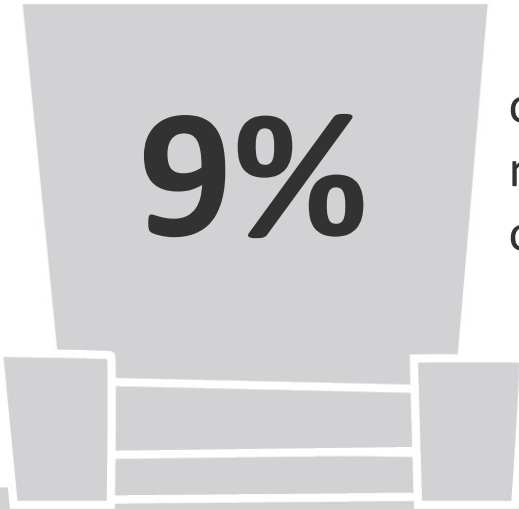
Entertainment  **63%**

Communication  **32%**

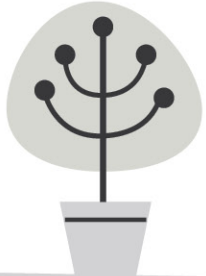


Context:

- *Primarily used at home*
- *Entertainment and browsing*
- *Unbounded sense of time*
- *Relaxed and leisurely approach*



of our daily media interactions occur on a tablet



Consumer viewpoints on device differences



“**My phone...** I consider it my **personal device**, my go-to device. It’s close to me, if I need that quick, precise feedback.

When I need to be more in depth, that’s when I start using **my tablet**. The other part of it is where I **disconnect from my work** life and kind of go into where I want to be at the moment..... I’m totally removed from today’s reality. I can’t get a phone call, I don’t check my **email it’s my dream world**.

And then moving to the **laptop**, well, for me **that’s business**. **That’s work**. I feel like I’ve got to be crunching numbers or doing something.”

- Bradley



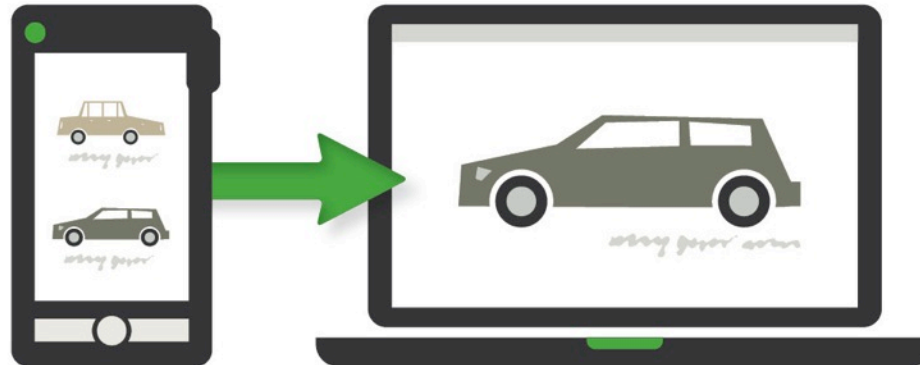
Two main modes of multi-screening



There are two modes of multi-screening

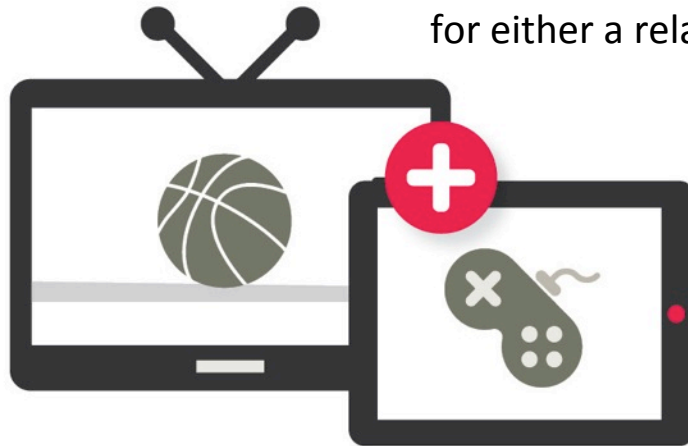
Sequential Usage

Moving from one device to another at different times to accomplish a task

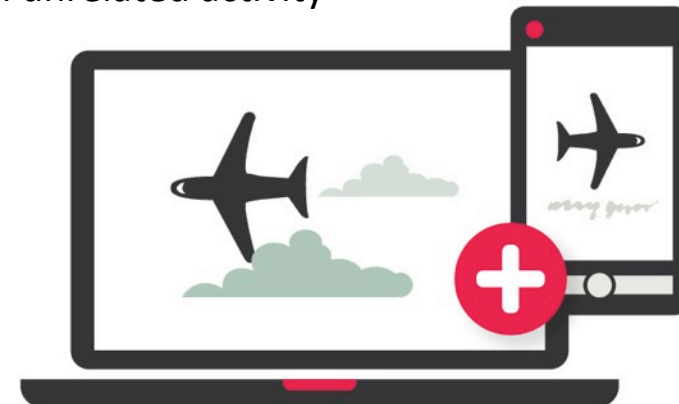


Simultaneous Usage

Using more than one device at the same time for either a related or an unrelated activity



Multi-tasking - Unrelated activity

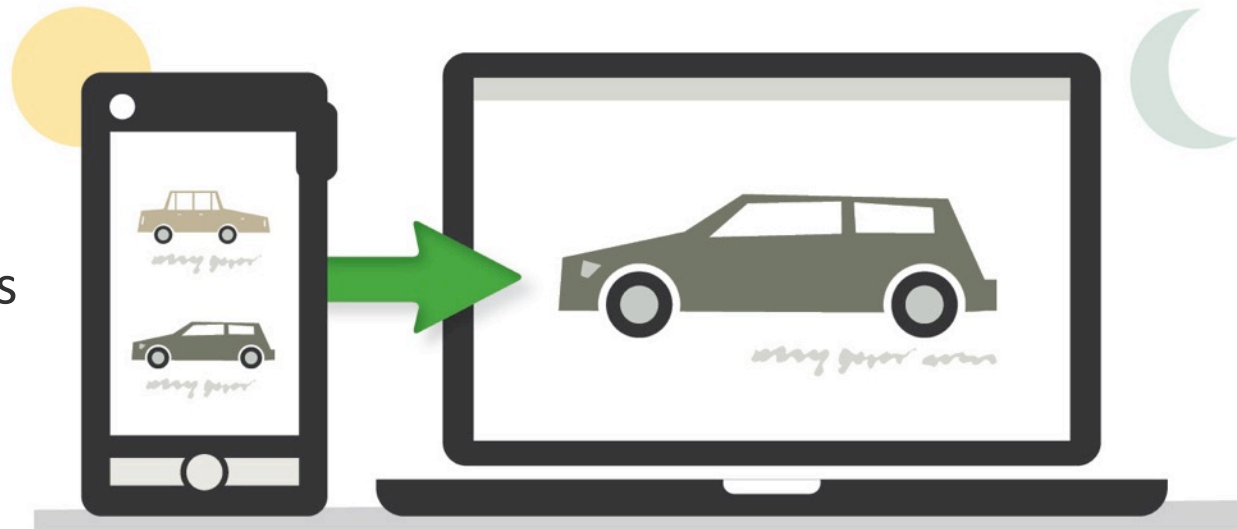


Complementary Usage - Related activity

Sequential screening is common & mostly completed within a day

90%

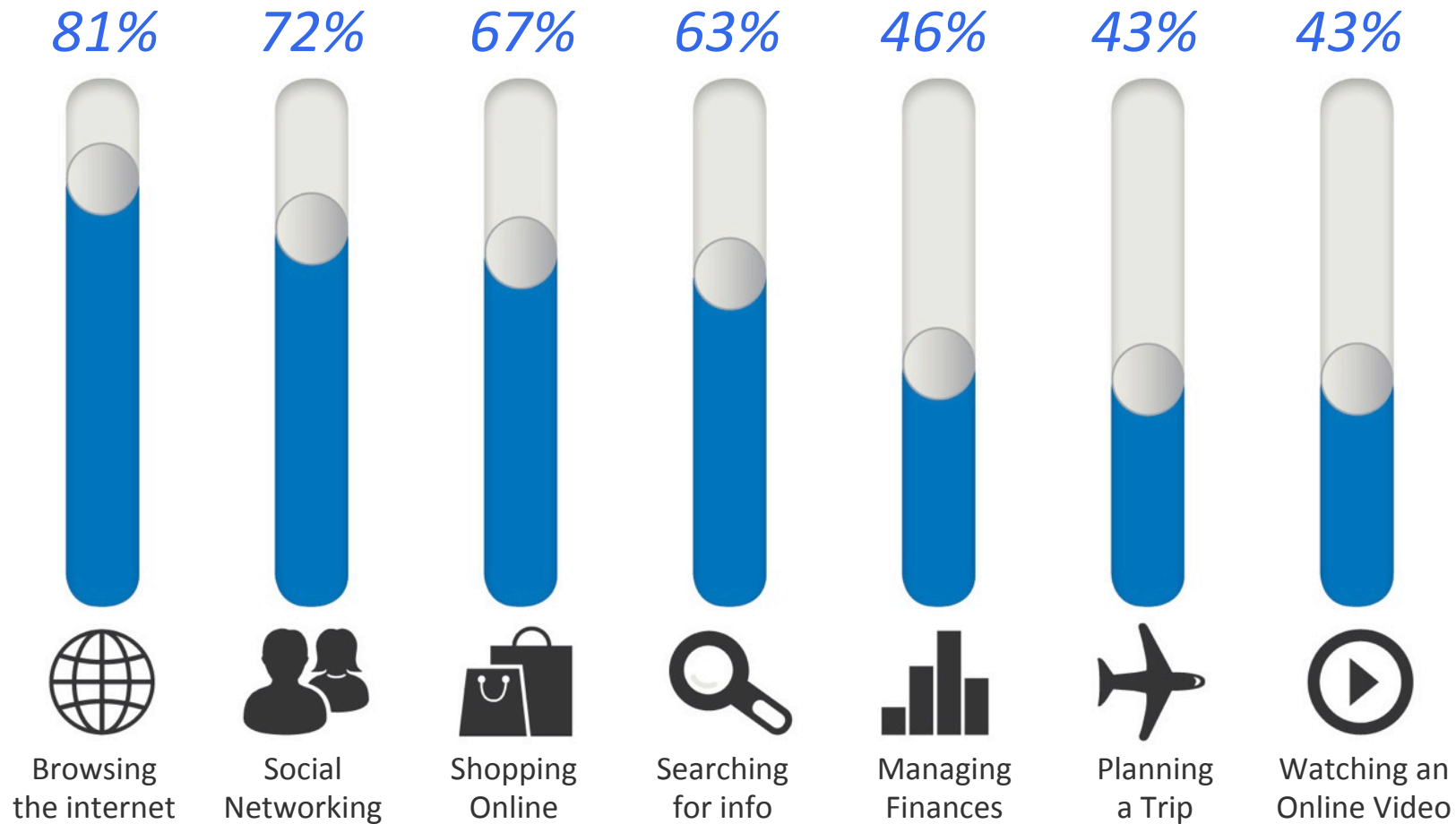
Use multiple screens **sequentially** to accomplish a task over time



98% move between devices that same day



Top activities performed when sequentially screening between devices



Base: Have Started Activity on One Device & Continued on Another (1455). Q. For the activities listed below, think about the last time you started each activity on one device and then continued or finished the same activity on another device. Please select which device you started and then continued on. If you have not done this, select "I have not done this".



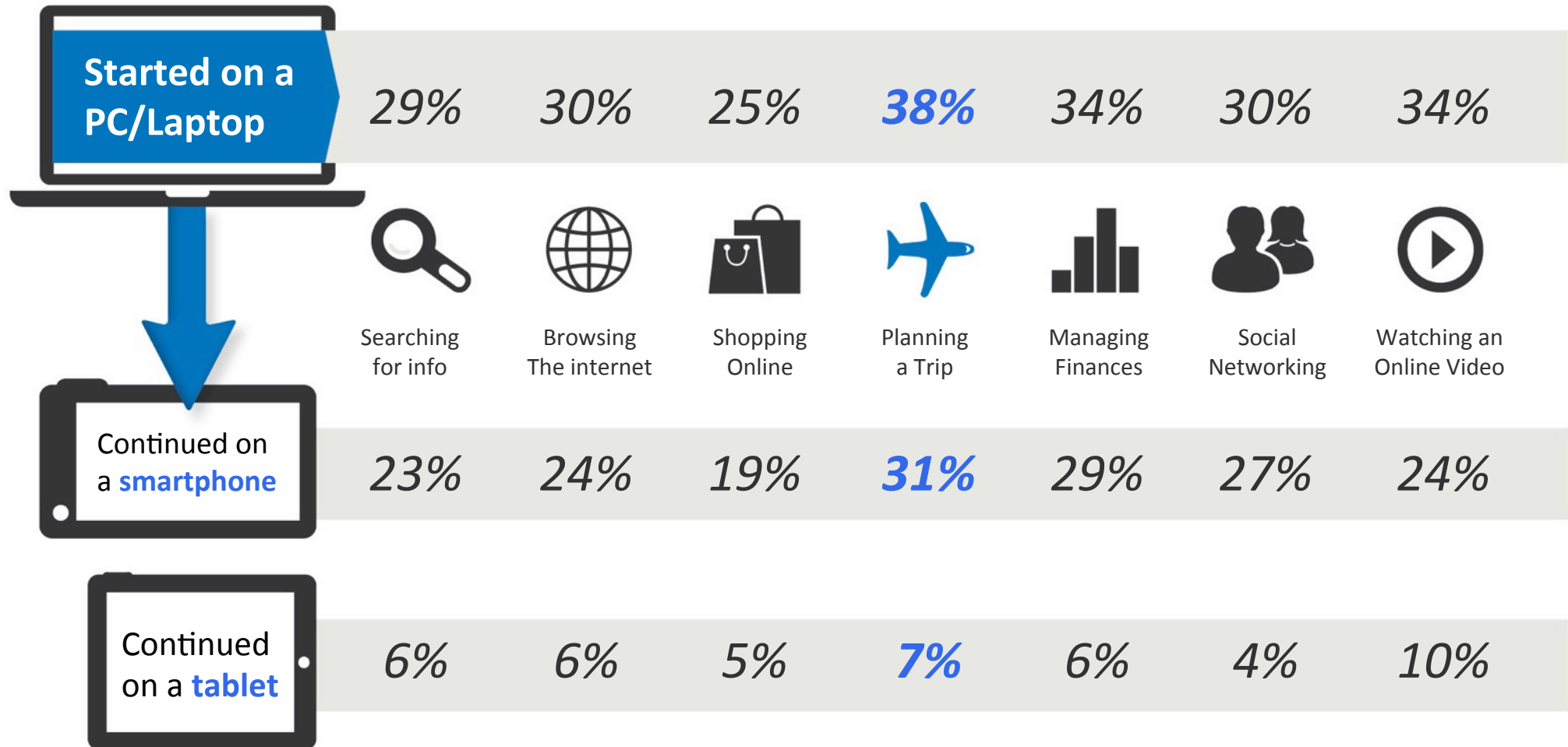
Smartphones are the most common starting place for online activities



Base: Have Started Activity on One Device & Continued on Another (1455); Searching (923), Browsing (1172), Shopping (969), Planning a Trip (627), Finances (675), Social (1041), Watching a Video (623). Q. For the activities listed below, think about the last time you started each activity on one device and then continued or finished the same activity on another device. Please select which device you started and then continued on. If you have not done this, select "I have not done this".



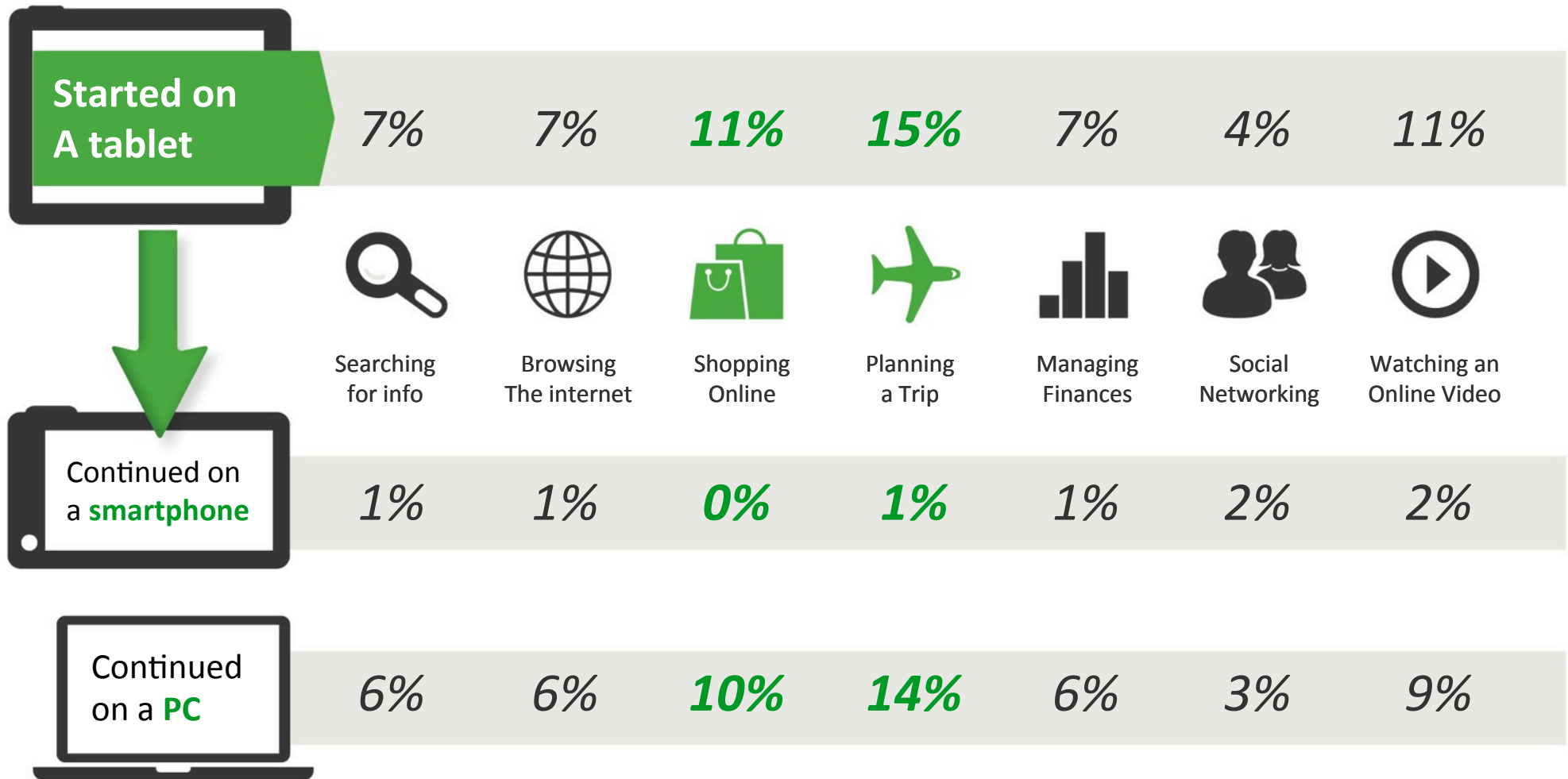
PCs are most often a starting point for more complex activities



Base: Have Started Activity on One Device & Continued on Another (1455); Searching (923), Browsing (1172), Shopping (969), Planning a Trip (627), Finances (675), Social (1041), Watching a Video (623). Q. For the activities listed below, think about the last time you started each activity on one device and then continued or finished the same activity on another device. Please select which device you started and then continued on. If you have not done this, select "I have not done this".



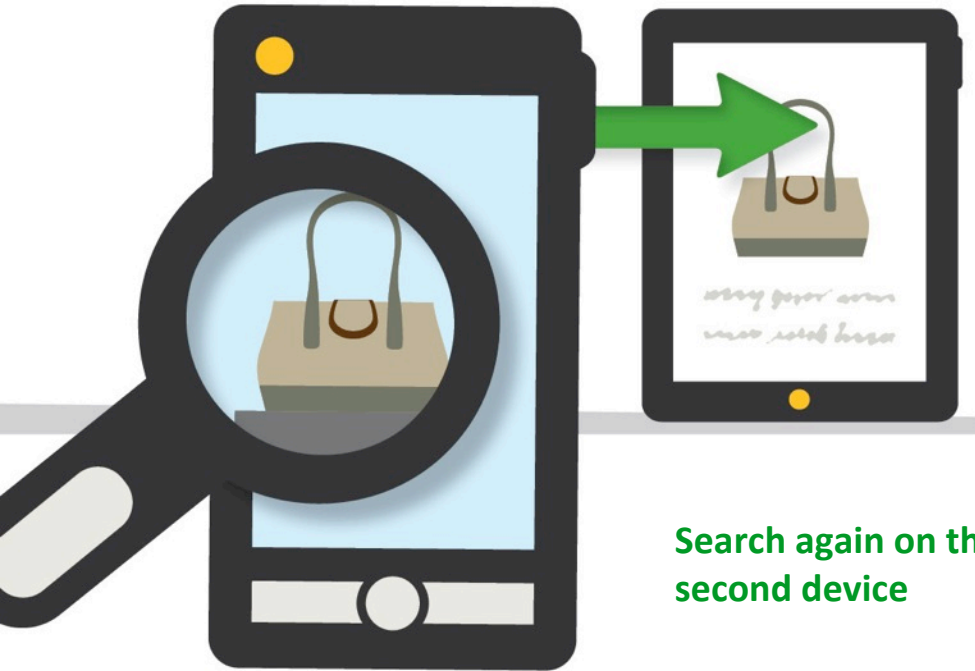
Tablets are most often a starting point for shopping and trip planning



Base: Have Started Activity on One Device & Continued on Another (1455); Searching (923), Browsing (1172), Shopping (969), Planning a Trip (627), Finances (675), Social (1041), Watching a Video (623). Q. For the activities listed below, think about the last time you started each activity on one device and then continued or finished the same activity on another device. Please select which device you started and then continued on. If you have not done this, select "I have not done this".



Consumers rely on search to move between devices



Search again on the second device

Directly navigating to the destination site

Via email / sending a link to myself



Searching for info

63%

52%

49%



Browsing The internet

61%

58%

45%



Shopping Online

51%

48%

31%



Watching an Online Video

43%

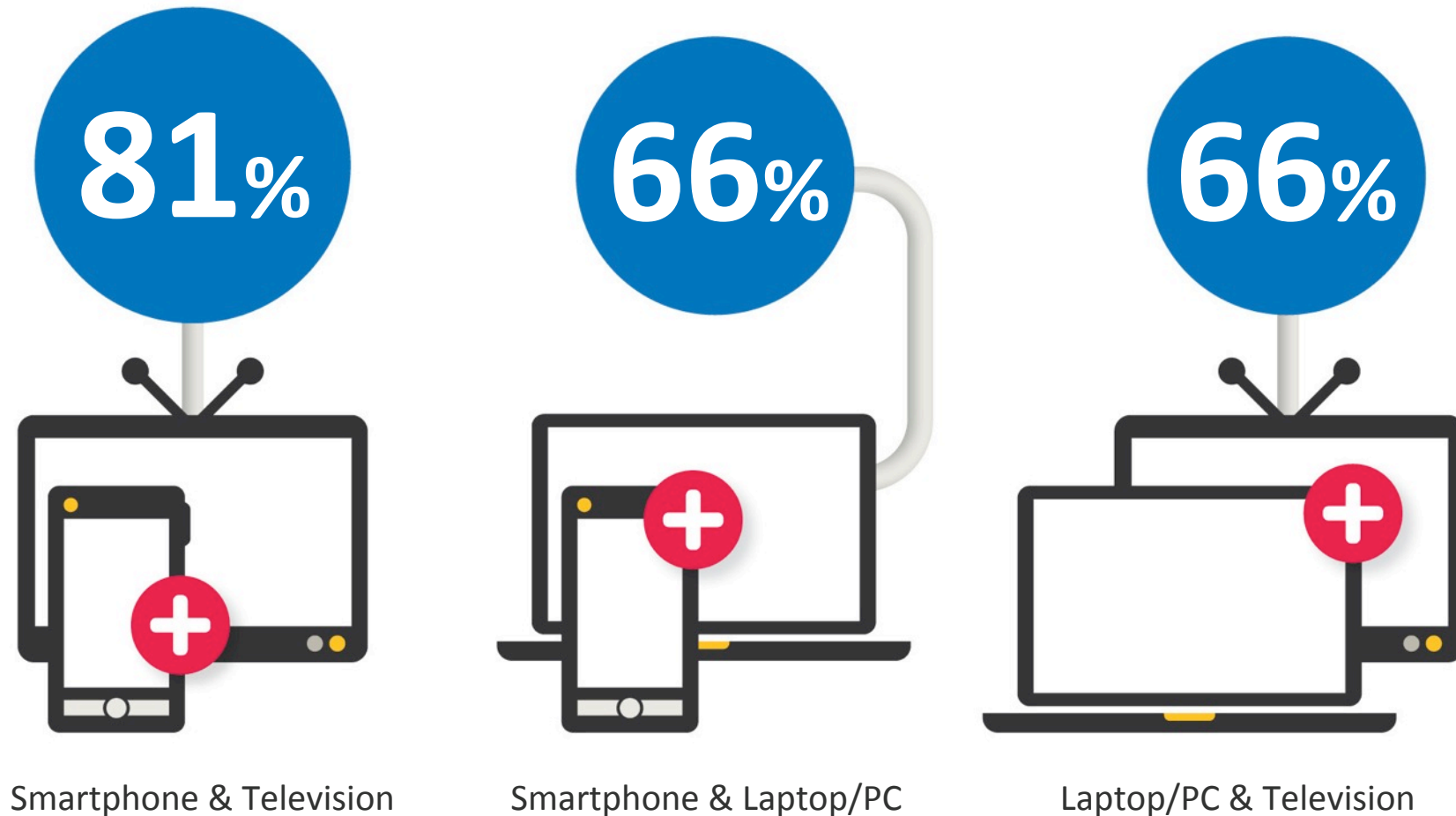
43%

30%



We also multi-screen by using more than one device simultaneously

We use an average of three different screen combinations every day



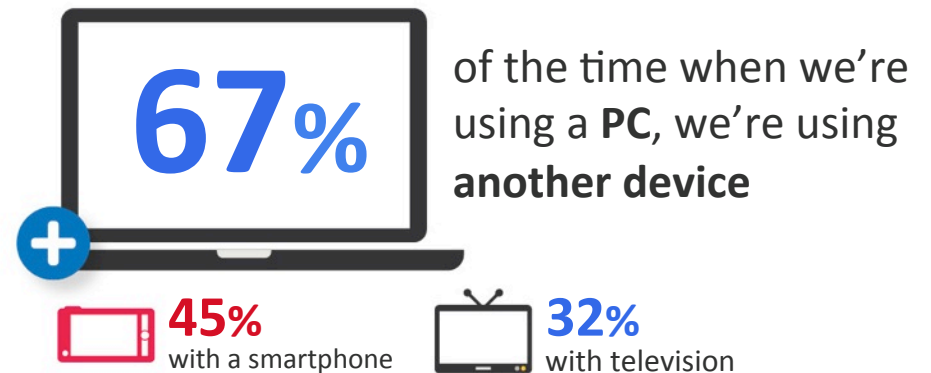
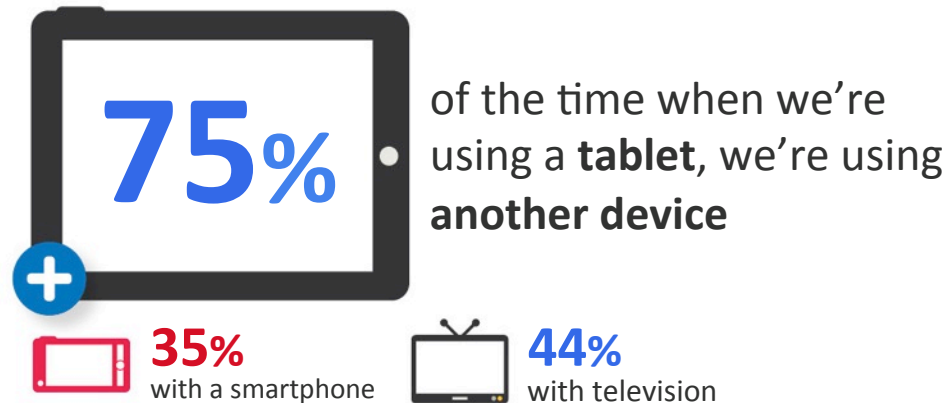
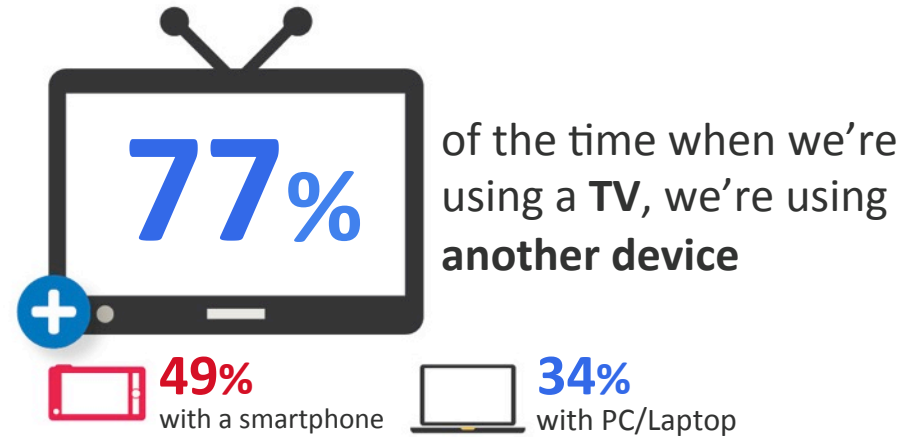
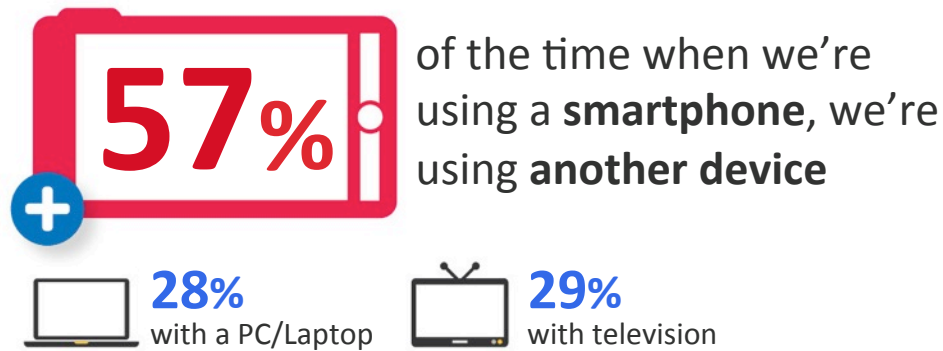
Smartphone & Television

Smartphone & Laptop/PC

Laptop/PC & Television



Smartphones are the most frequent companion devices during simultaneous usage



Top activities performed during simultaneous screen usage

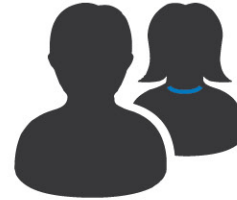
60%
Emailing



44%
Internet Browsing



42%
Social Networking



25%
Playing a Game



23%
Searching



15%
Work Documents



9%
Watching Video



Most consumers are multi-tasking and juggling different activities at the same time

78% of simultaneous usage is **multi-tasking**



Key multi-tasking device combinations



"I do find myself being distracted from what I'm watching a lot more, now that I have these devices. I'll find myself, just out of habit, picking up the touchpad or the phone and deciding to search on the internet for a little bit. I've never understood why I do it, but I just do it in the middle of a TV show, and start searching... It's frustrating that I do it though, because you feel like you don't stay as engaged with the show that you're watching." - Bradley

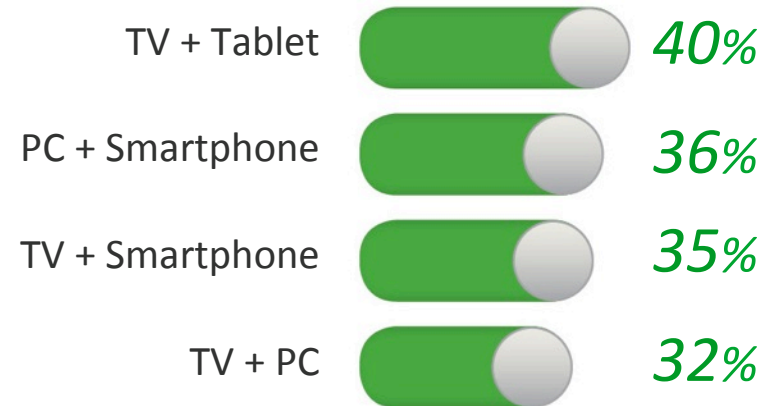


Consumers are also conducting complementary activities across screens

22% of simultaneous usage is **complementary**



Key complementary device combinations




“It depends on the program like with certain programs like “The Wire” I was really into what other people were saying about it. So I would go on to the blogs and you know, what did you guys think about this and stuff like that. Or if there’s an actress that I recognize, but I can’t remember where I recognize her from, I’ll just do a quick search on IMDB, or something like that.” - Andrew



The changing role of television in a multi-screen world



TV no longer commands our full attention



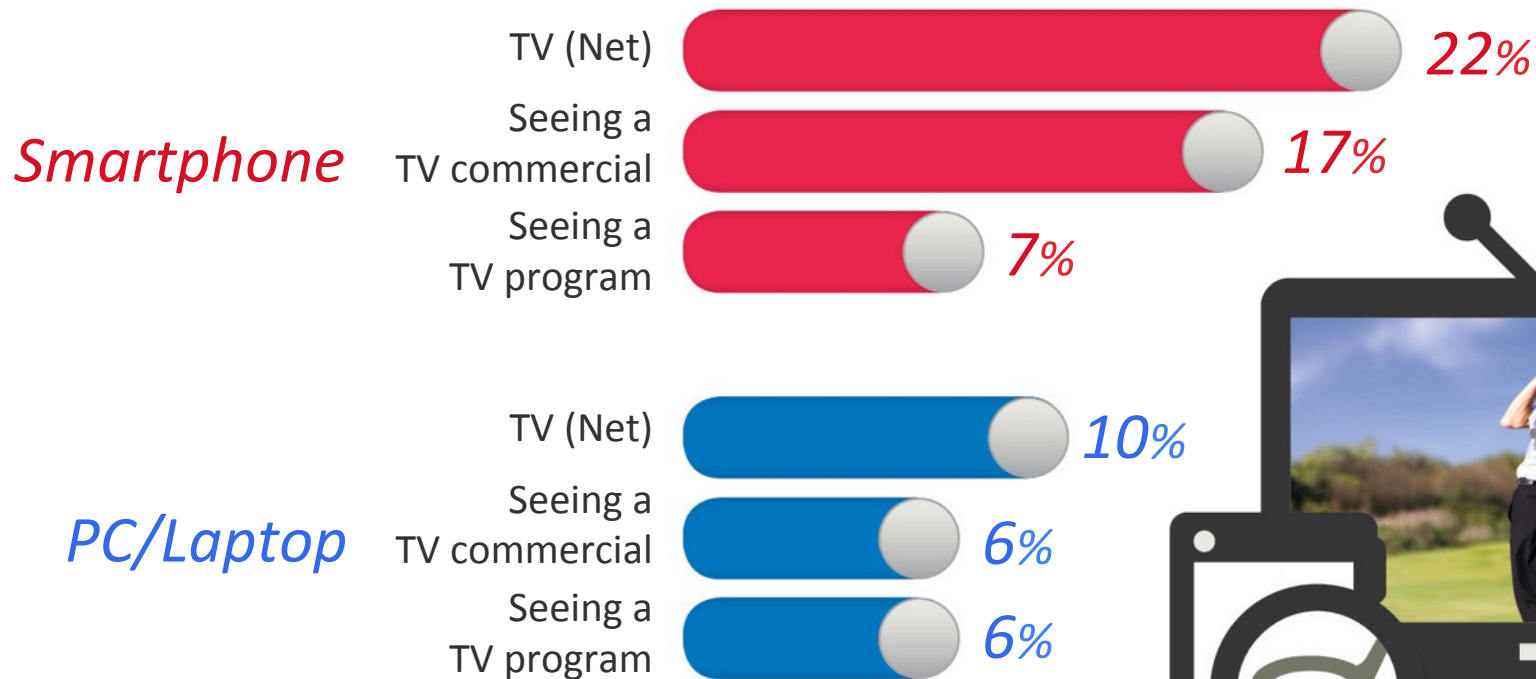
77%
of TV viewers
use another
device at the
same time in a
typical day



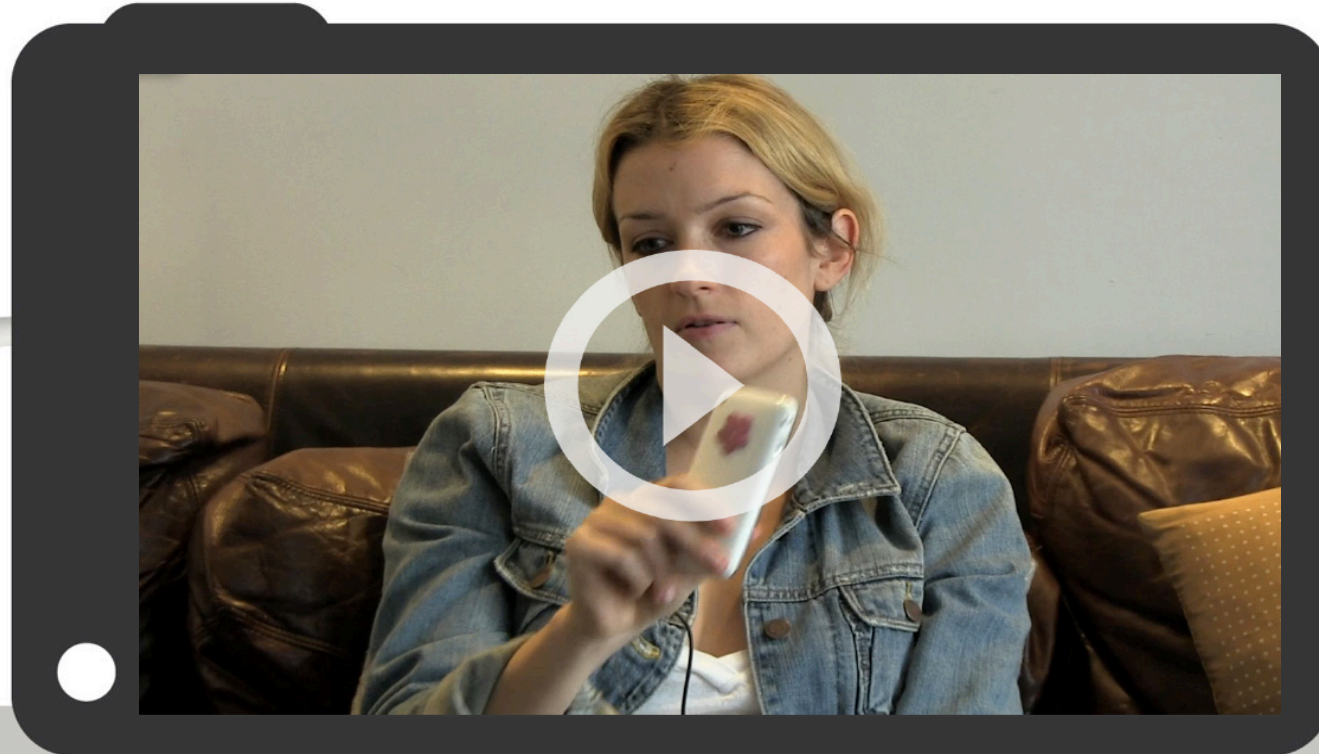
“I’m sometimes shopping, sometimes looking for recipes, sometimes typing them up, you know. Sending emails, reading, I could do anything on there. It’s not often that I just sit and watch TV and do just that.” - *Lori*

TV is a major catalyst for search

Percent of search occasions that were prompted by television



Consumers search for things they see on TV



“I’ll be watching a movie or TV show and I’ll look up the actor or actress on IMDB or I’ll Google image them, or I’ll see when it was made or how it was filmed. I’m always doing that. And I use my phone a lot for stuff like that.” - *Kelly*

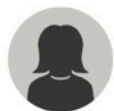
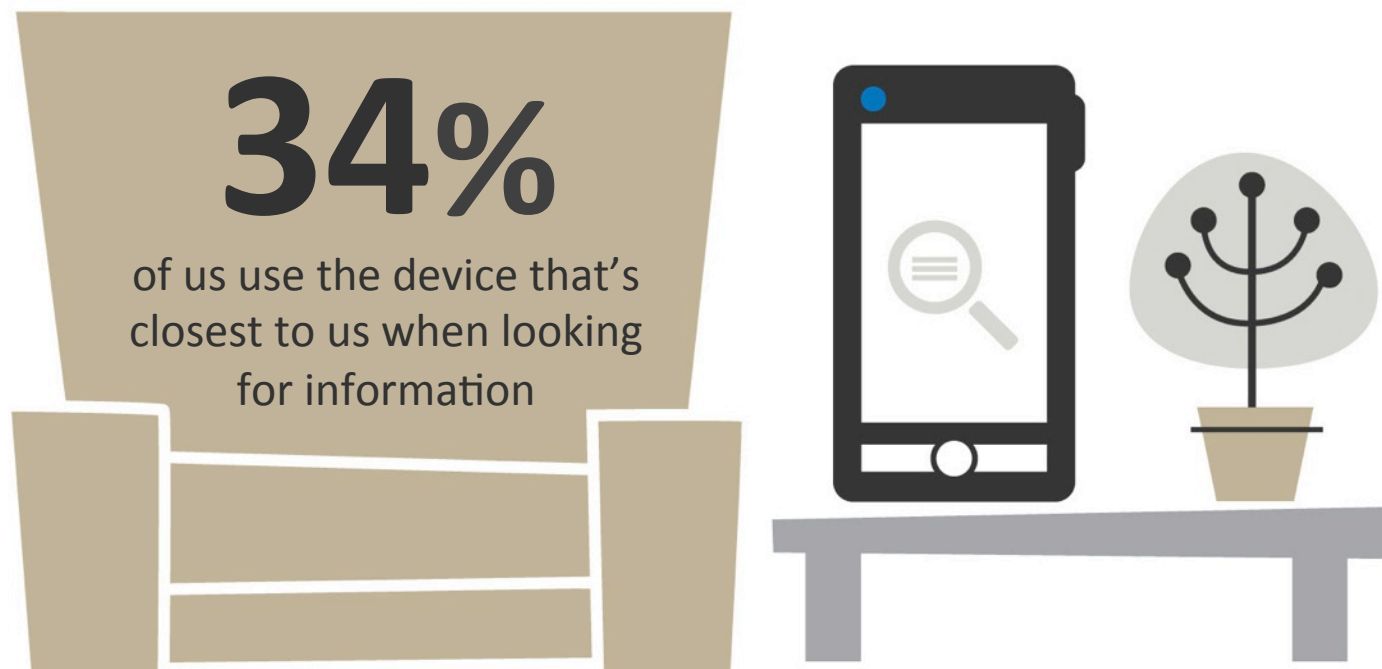


Discovering “found” time



Many times we turn to the screen that's closest

While we all have screen preferences for certain activities,
we are also creatures of convenience



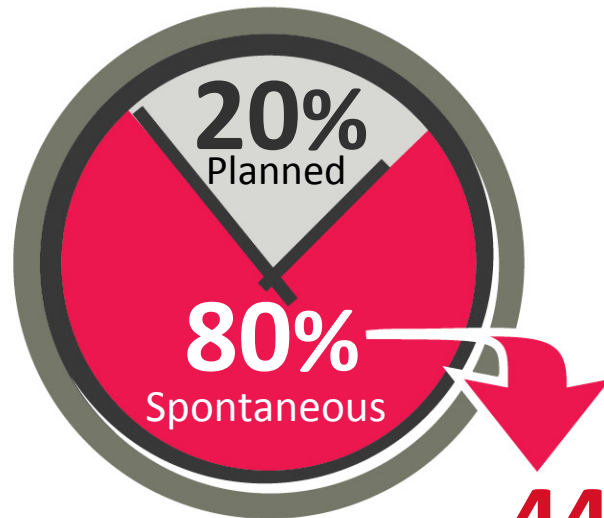
“If I’m watching TV I won’t go upstairs to grab my laptop to follow up on a product I see, I’d just pull out my phone.” - *Sophie*



We accomplish goals through spontaneous device usage

Spontaneous vs. Planned Search

Smartphone

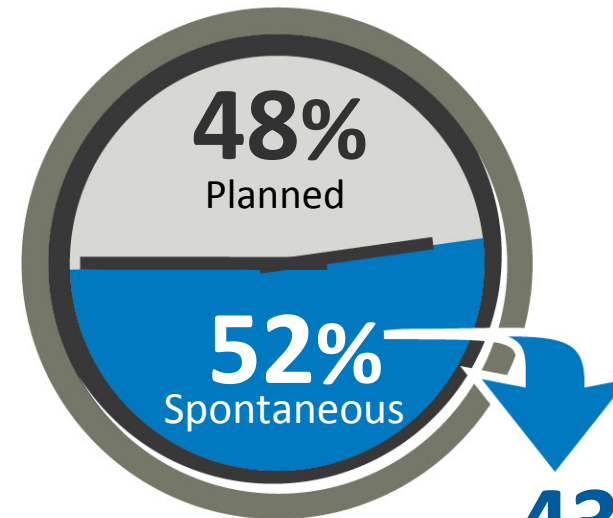


44%



of all **spontaneous** searches on smartphone were to **accomplish a goal**

PC/Laptop



43%



of all **spontaneous** searches on PCs were to **accomplish a goal**



All the answers to all my questions



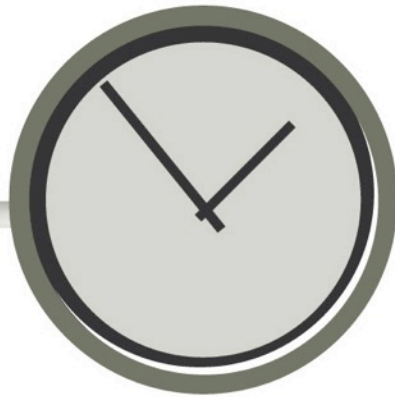
“Now that I know I have some device that has all the answers to all my questions, it’s just so easy. Like I could be at the train station, as an example; I see an ad for something. Oh, that sounds cool, let me check that out, and I’ll go on to Wikipedia on my phone. I’ll do some research about it. Oh there’s a new show. I saw an ad for Mad Men a few months ago and I just wanted to know what date it was starting. So, I went on to my phone, went to Google, typed in Mad Men start date and within three seconds I found out the start date. I came home and set my DVR to record Mad Men, and stuff like that.” - Andrew

“Found time” arises from this spontaneous usage

This combination of device accessibility and spur-of-the-moment usage to get something done leads to a sense of “found time”

Consumers use these “micro-moments” across multiple screens to search, shop, communicate and keep entertained.

This offers advertisers more touchpoint opportunities to engage consumers throughout the day.



“I’m online more than before, for sure. I check a lot more stuff every day than I normally would have never done, because it’s so easy to check. I can go to 10 apps, when I have 15 free minutes, I can check my bank account or I can check the news or I can check some music websites that are very cool.” - Leum

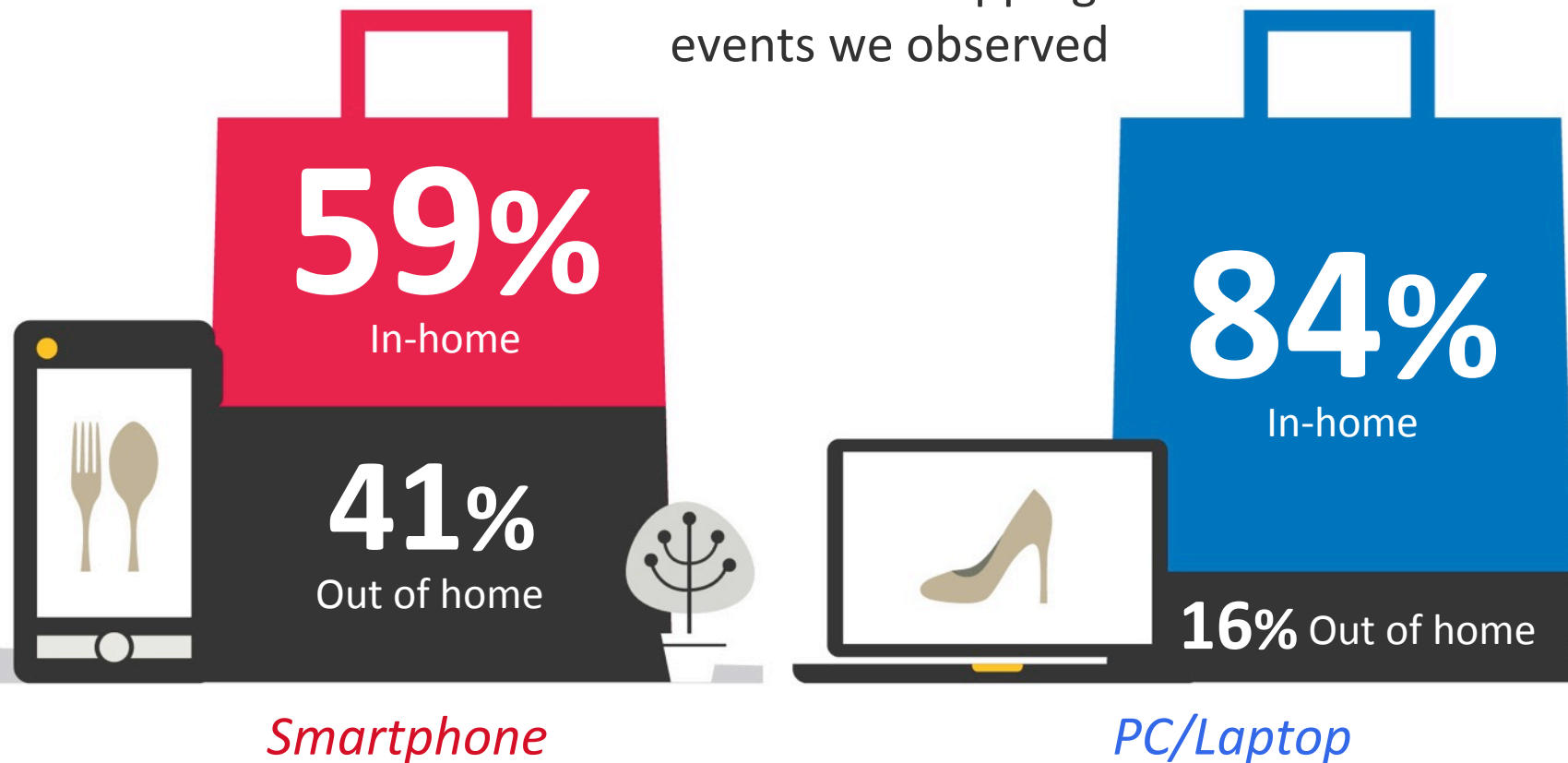
“I scan for deals on Groupon or Twitter when I’m waiting in line. It’s life time management. Whether it’s something urgent for business or something fun – I get to choose what to look at.” - Maria

The multi-screen shopper



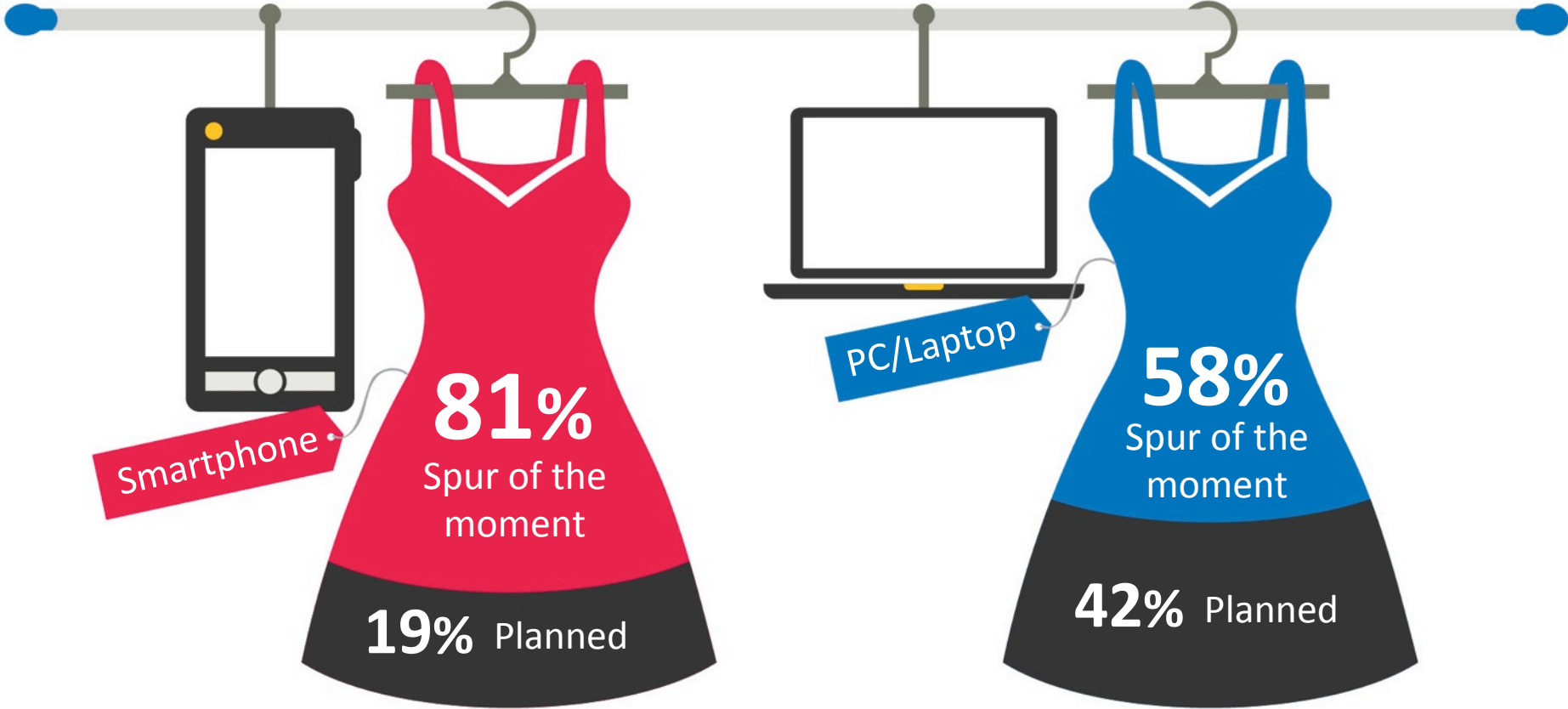
Smartphones allow us to shop at home or on-the-go

Of all the shopping events we observed



Spontaneity plays a major role in shopping

Spur-of-the-moment vs. Planned shopping



Base: Total Answering Follow-Up Activity and Were Looking for Shopping-Related Info– PC/Laptop (297); Smartphone (131). Q. Would you consider your use of a [DEVICE] to be planned or spur of the moment (spontaneous)? *Note: Data represents aggregate of the following activities probed on in follow-up survey: Browsing and Search.

Search drives access to shopping content more on mobile



How shopping related content is accessed



	Smartphone	Laptop
Typed website directly into browser	36%	50%
Already had it bookmarked	27%	36%
Through email	28%	29%
Through a search engine	30%	24%
Via social networking site	25%	16%



We often move from one screen to another while shopping

67%

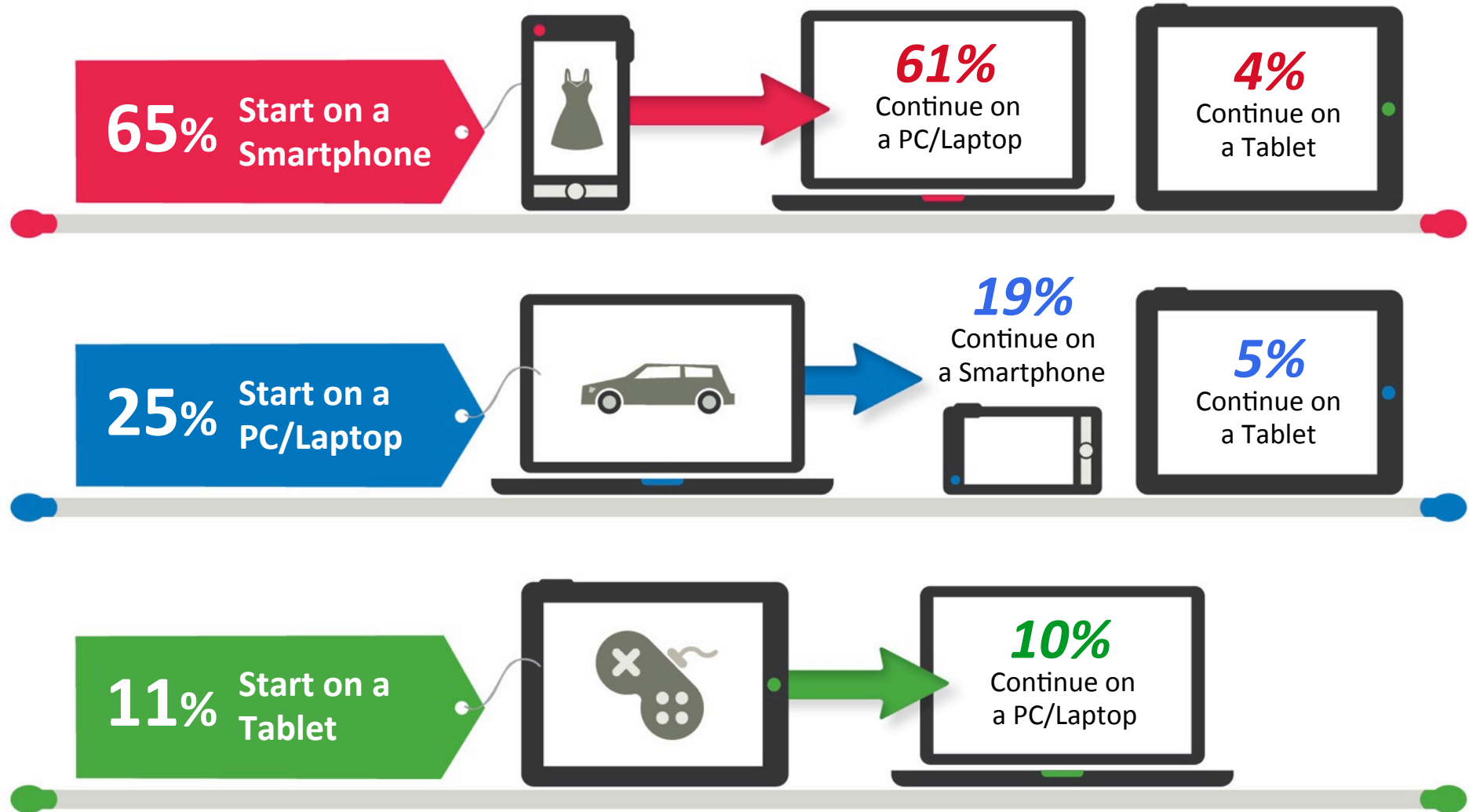
of us start shopping on one device and continue on another



“No, I’ll usually check to see on my phone if they have it online. I’ll usually order it when I get home. **a)** because I just feel more comfortable, and **b)** if I’m going to order it online sometimes I’ll look to see if there’s anything else online that wasn’t in the store that I want to add into the purchase.” - *Jennifer*



Consumers take a multi-device path to purchase



Multi-screen lessons to apply

- 1** The vast majority of media interactions are **screen-based**, and so marketing strategies should no longer be viewed as “digital” or “traditional”. Businesses should understand all of the ways that people consume media, particularly digital, and tailor strategies to each channel
- 2** Consumers turn to their devices in **various contexts**. Marketing and websites should reflect the needs of a consumer on a specific screen, and conversion goals should be adjusted to account for the inherent differences in each device
- 3** The prevalence of **sequential usage** makes it imperative that businesses enable customers to save their progress between devices. Saved shopping carts, “signed-in” experiences or the ability to email progress to oneself helps keep consumers engaged, regardless of device used to get to you
- 4** **Consumers rely on search** to connect their experiences across screens. Not only should brands give consumers the opportunity to find them with multi-device search campaigns, strategies such as keyword parity across devices can ensure consumers can find the brand when resuming their search

Multi-screen lessons to apply

5 During **simultaneous usage**, content viewed on one device can trigger specific behavior on the other. Businesses should therefore not limit their conversion goals and calls to action to only the device where they were initially displayed

7 Consumers shop differently across devices, so businesses should **tailor the experience to each channel**. It's also important to optimize the shopping experience across all devices. For example, consumers need to find what they are looking for quickly and need a streamlined path to conversion on smartphones

6 Most of the time when **TV** is watched, **another screen is being used**. These instances present the opportune time to convey your message and inspire action. A business's TV strategy should be closely aligned and integrated with the marketing strategies for digital devices

8 **Smartphones are the backbone** of our daily media use. They are the devices used most throughout the day and serve as the most common starting point for activities across multiple screens. Going mobile has become a business imperative



Google™