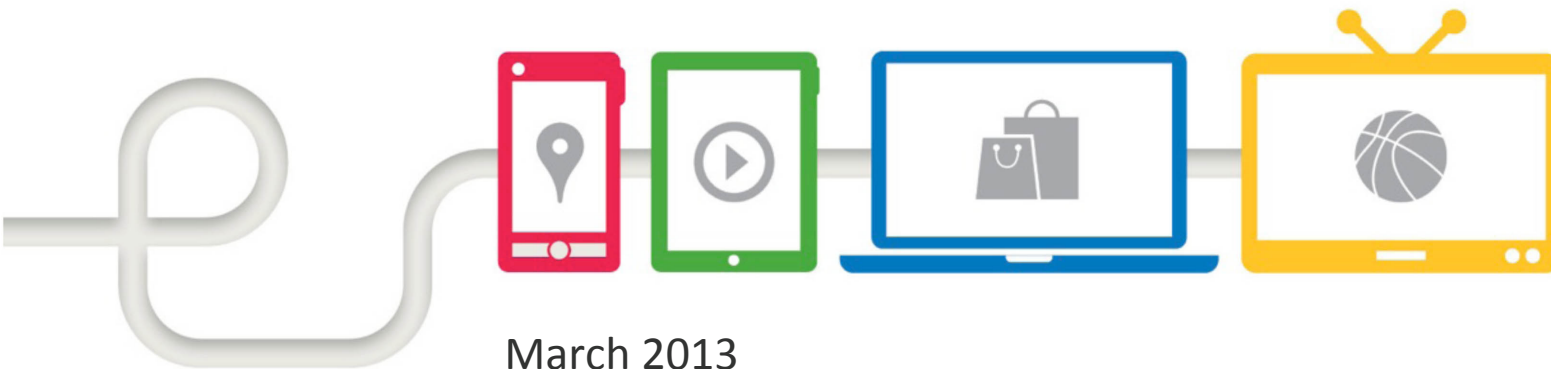




The New Multi-screen World:

Understanding Cross-platform Consumer Behaviour

AUSTRALIA



March 2013

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

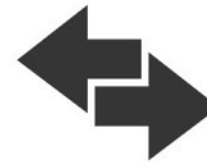


Research objectives

Gain a deep understanding of consumer media behaviour 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 Ipsos this research was conducted in two phases:

Quantitative:



976 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 behaviour was deployed the day following diary participation



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



1,745

Participants



5361

Entries



8591

Media Interactions



3,717

Hours of activity

Research conducted in Q1 2013

Agenda

Multi-screen behaviour 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

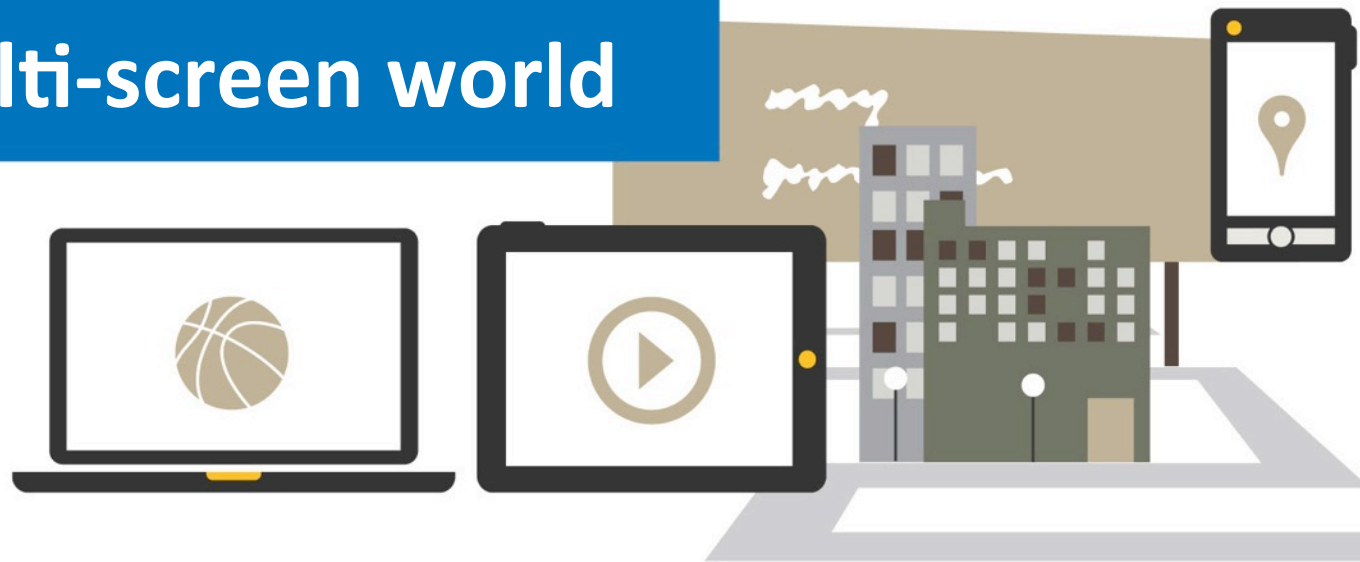
Spontaneous device usage

Multi-screen and shopping

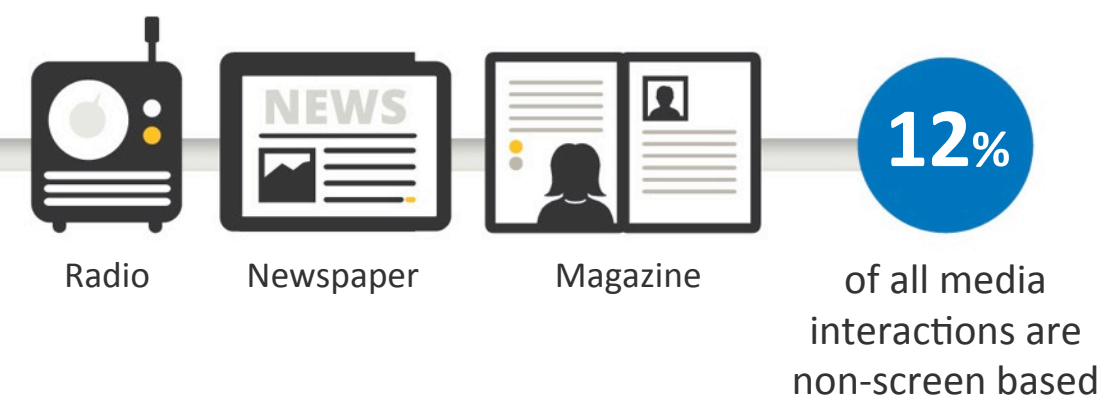
Implications for businesses



The new multi-screen world



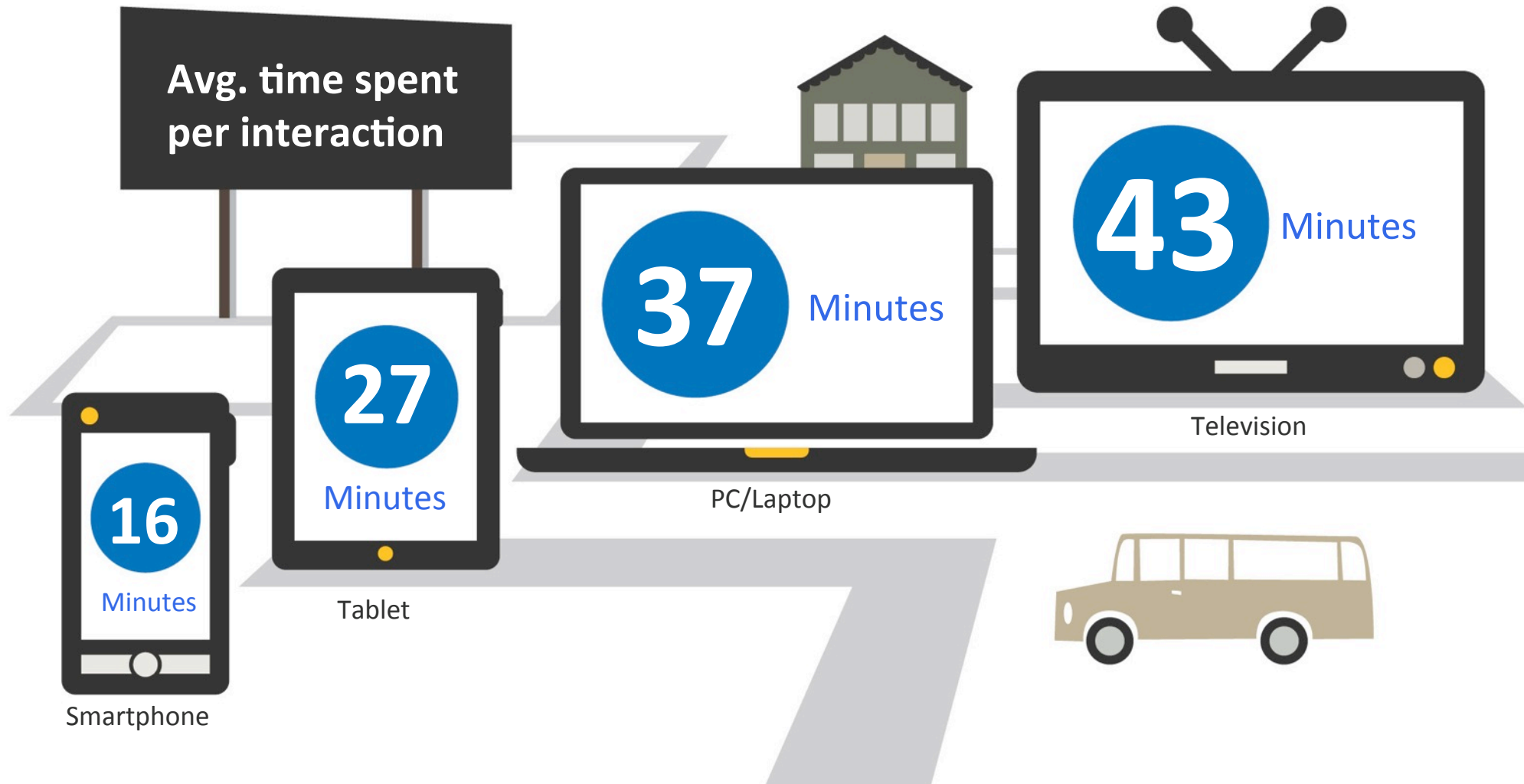
Majority of our daily media interactions are screen based



On average we spend
4.1 hours
of our leisure time in
front of screens each day

Base: All Device Interactions – PC/Laptop (1958); Smartphone (3117); Tablet (567); TV (1955). Q. Which of the following did you use? Q. What else did you use at the same time? Note: Respondents were asked to consider printed hard copies of Newspaper and Magazine.

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

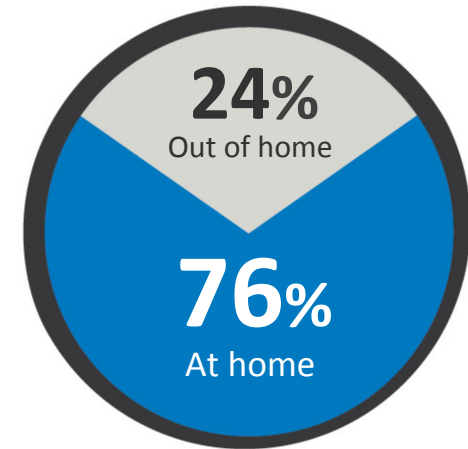
Computers keep us informed and productive

Context:

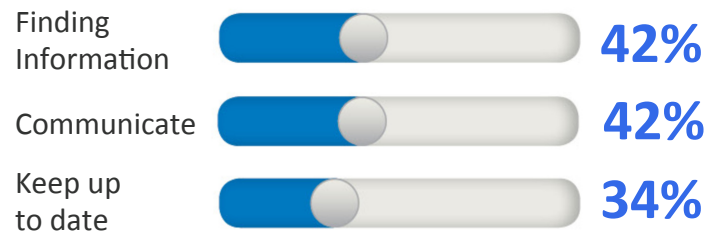
- Office or home use
- Productive, task-oriented
- Requires lots of time & focus
- Serious, research intensive attitude

23%

of our daily media interactions occur on a PC

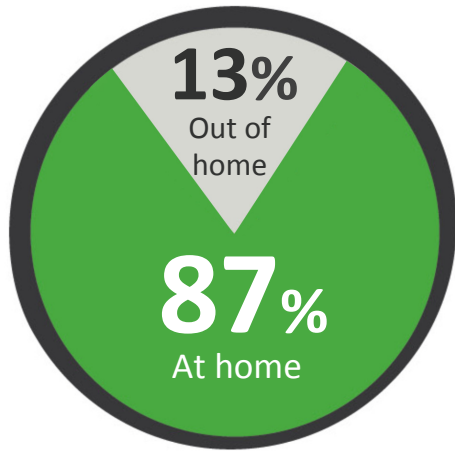
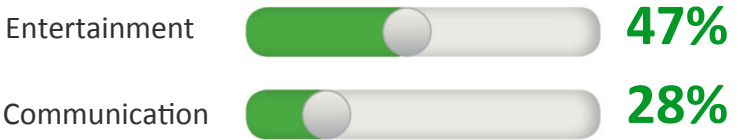


PC use is motivated by:



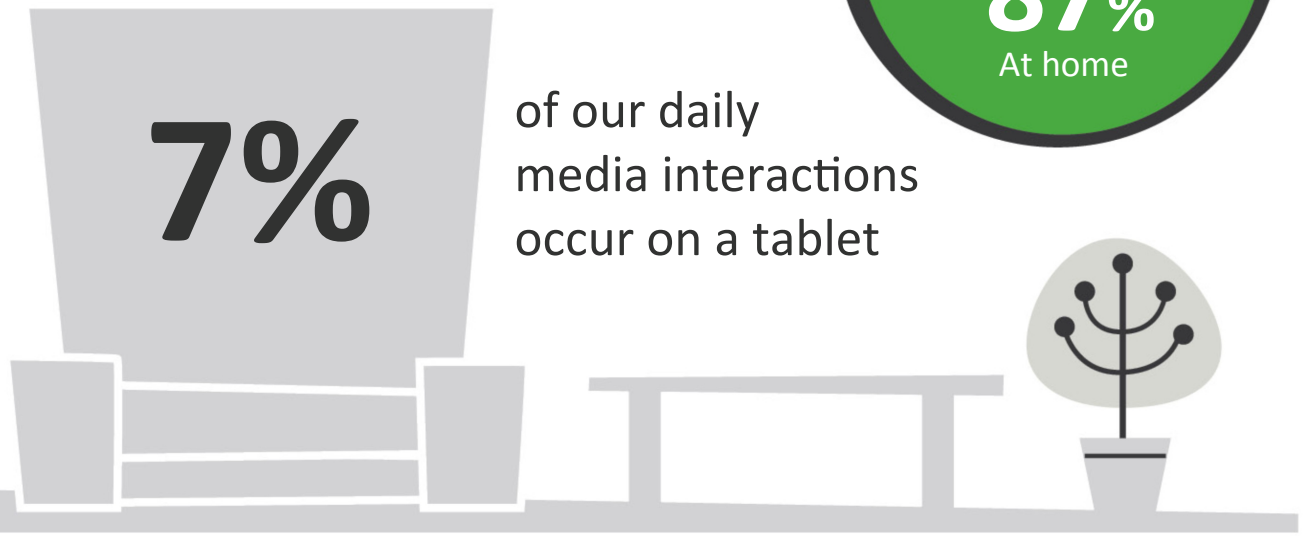
Tablets keep us entertained

Tablet use is motivated by:



Context:

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



Base: All Interactions Among Tablet Users (8591). Q. Which of the following did you use? Base: Total Tablet Interactions (567). Q. Which activities did you do on your tablet? Q. Did you do this to...? Q. Were you... Note: Out-of-Home represents net of the following: on-the go, in-store, at work and somewhere else

Smartphones keep us connected

Context:

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

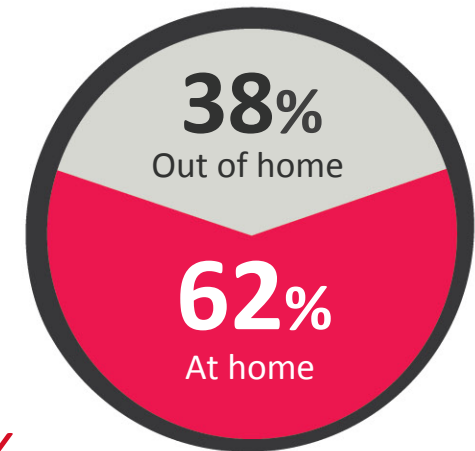
36%

of our daily media interactions occur on a smartphone

Smartphone use is motivated by:

Communication  **49%**

Entertainment  **31%**

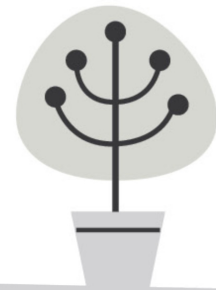
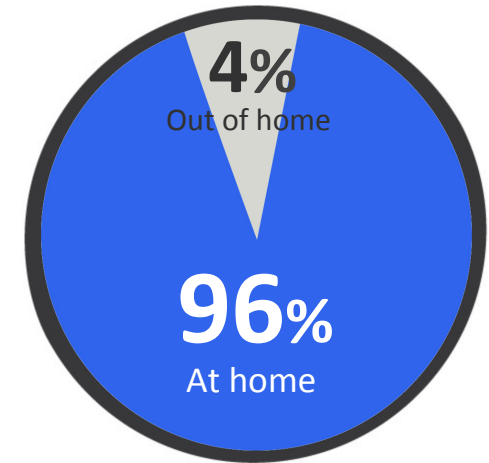


TV keep us entertained



23%

of our daily media interactions occur on a TV



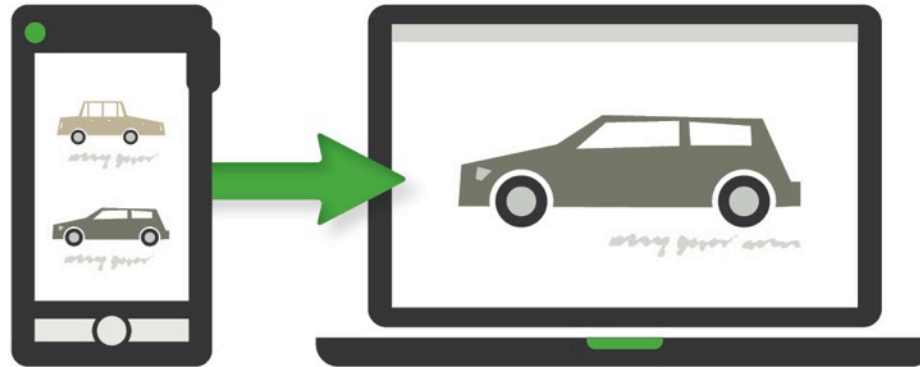
Two main modes of multi-screening



There are two modes of multi-screening

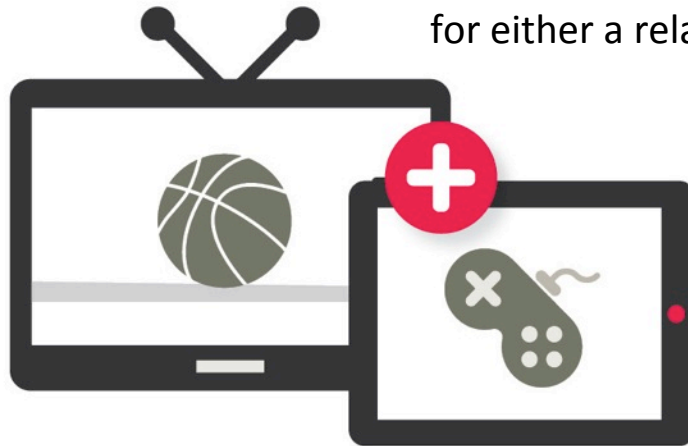
Sequential Usage

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

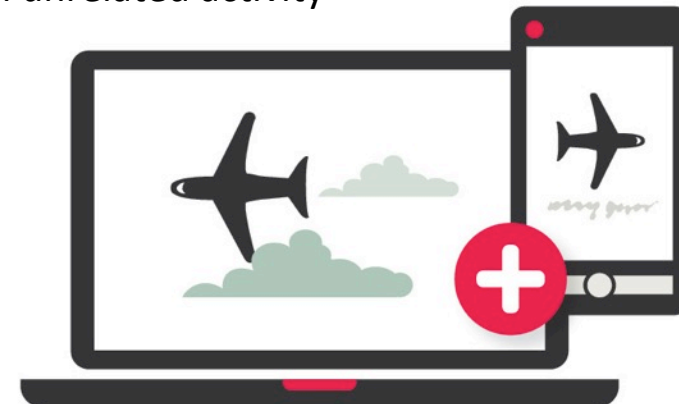


Simultaneous Usage

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



Disruptive Usage- Unrelated activity

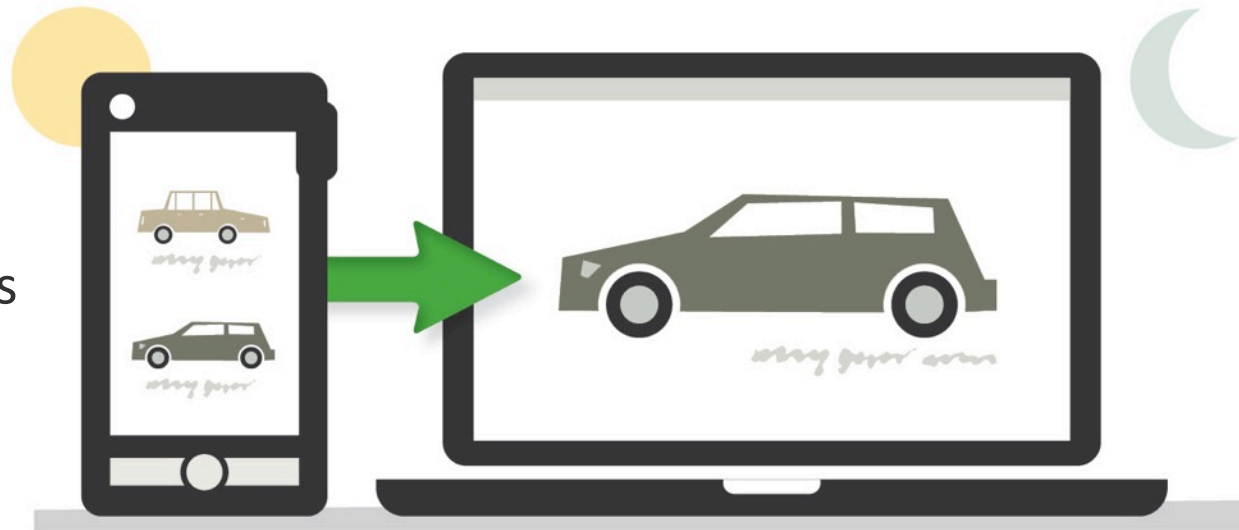


Complementary Usage - Related activity

Sequential screening is common & mostly completed within a day

81%

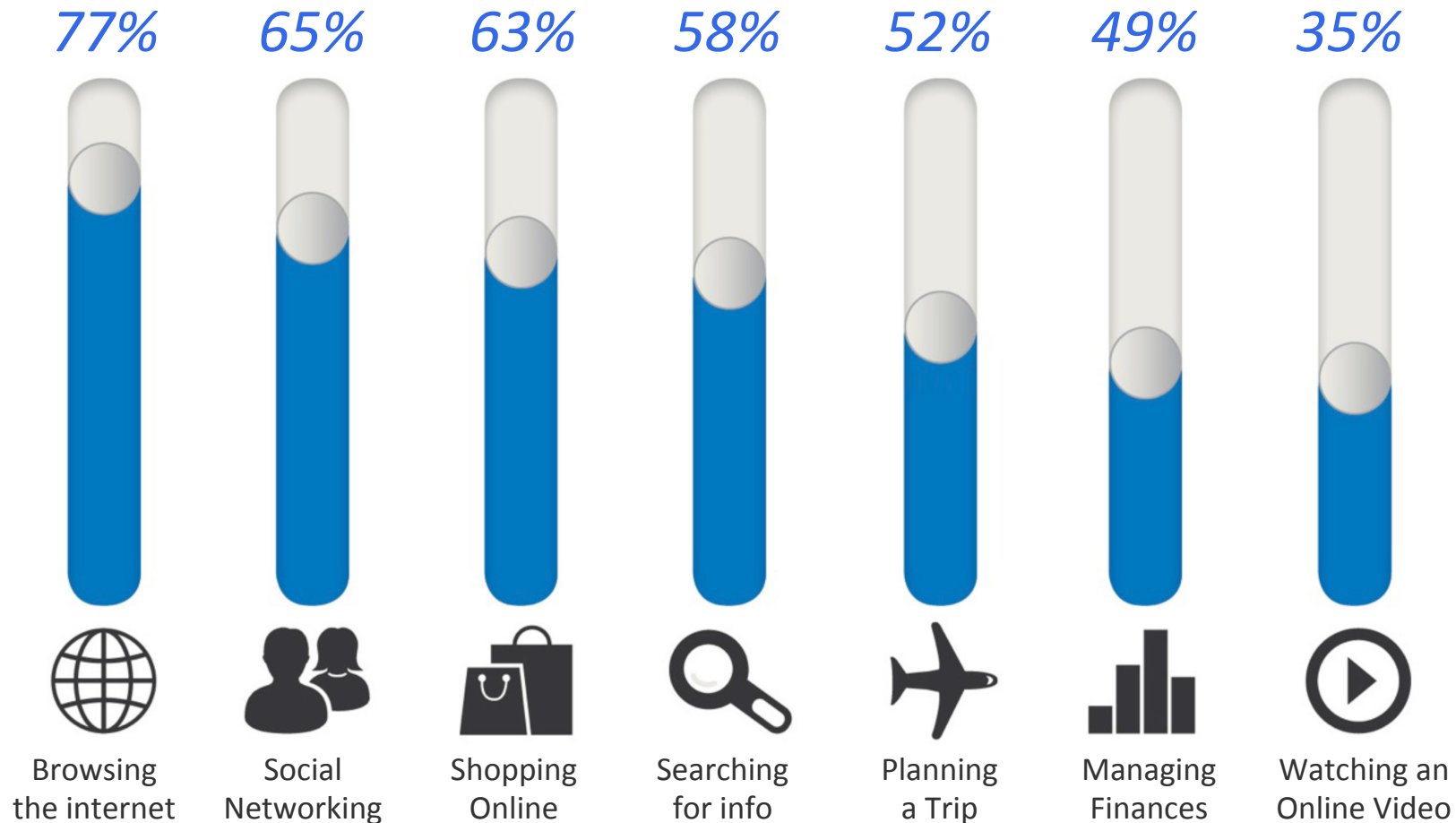
Use multiple screens **sequentially** to accomplish a task over time



97% move between devices that same day



Top activities performed when sequentially screening between devices



Base: Have Started Activity on One Device & Continued on Another (1435). 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 (1435); Searching (862), Browsing (1117), Shopping (925), Planning a Trip (731), Finances (704), Social (962), Watching a Video (503). 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".



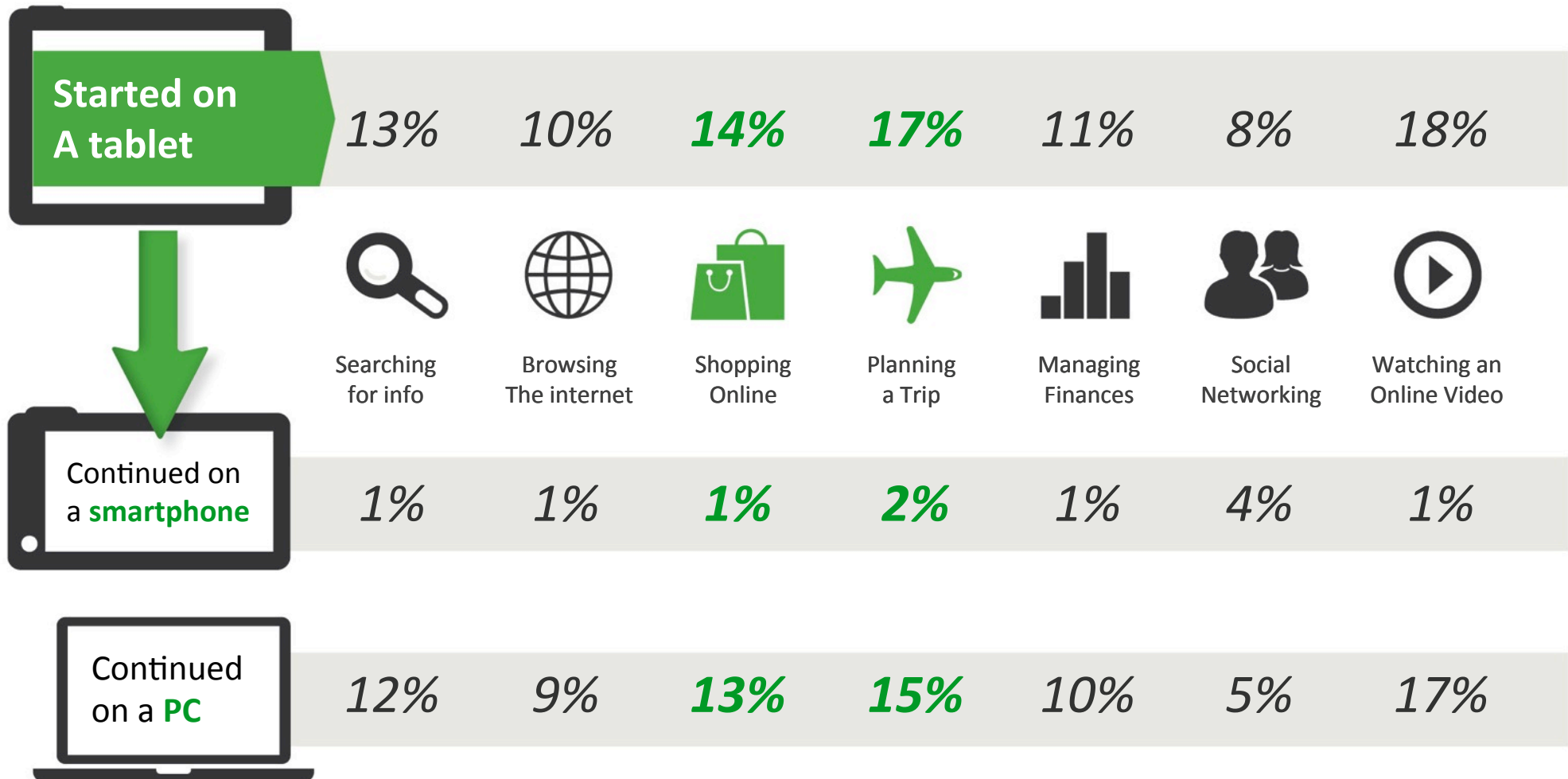
PCs are most often a starting point for more complex activities



Base: Have Started Activity on One Device & Continued on Another (1435); Searching (862), Browsing (1117), Shopping (925), Planning a Trip (731), Finances (704), Social (962), Watching a Video (503). 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 (1435); Searching (862), Browsing (1117), Shopping (925), Planning a Trip (731), Finances (704), Social (962), Watching a Video (503). 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

62%

49%

46%



Browsing The internet

63%

59%

44%



Shopping Online

54%

47%

28%



Watching an Online Video

44%

37%

27%



Nett Behavior

88%

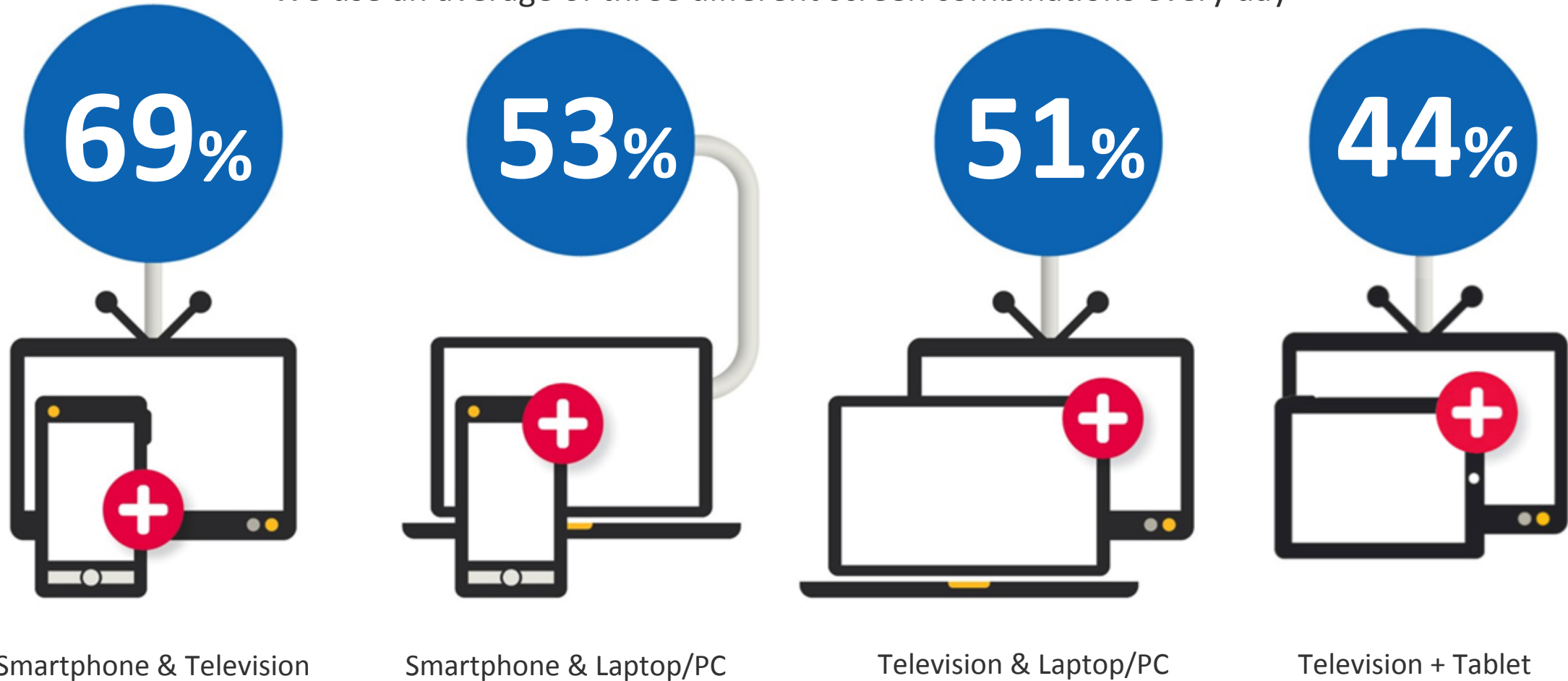
82%

68%

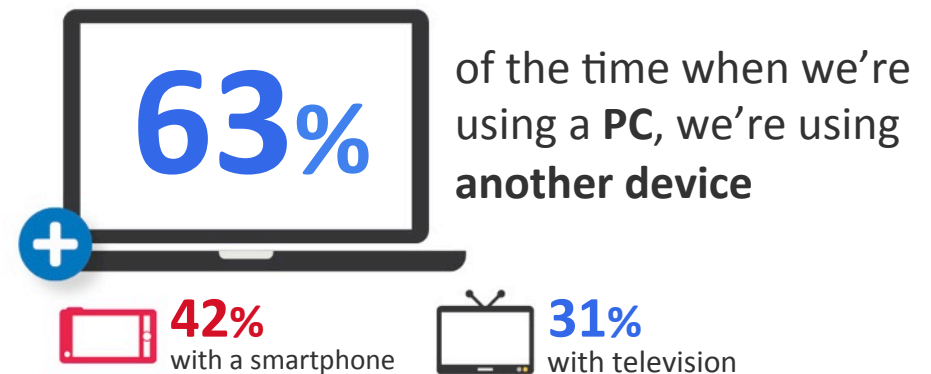
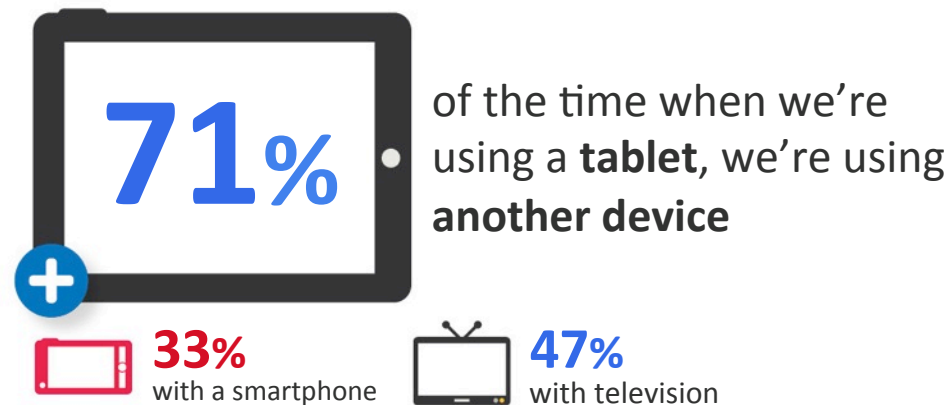
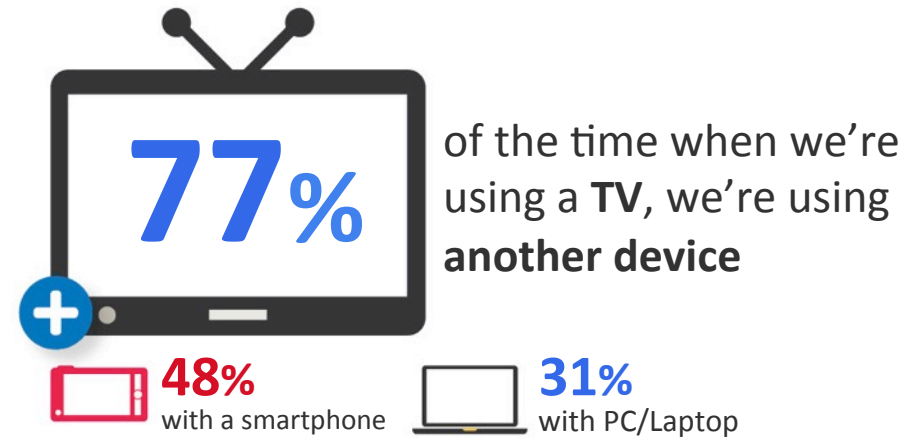
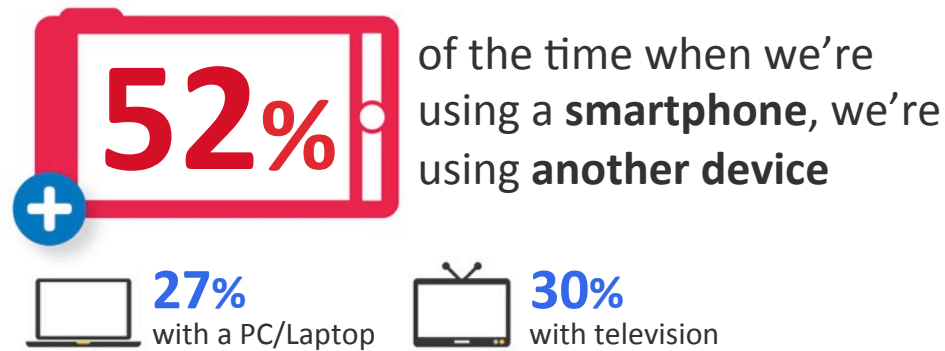


We also multi-screen by using more than one device simultaneously

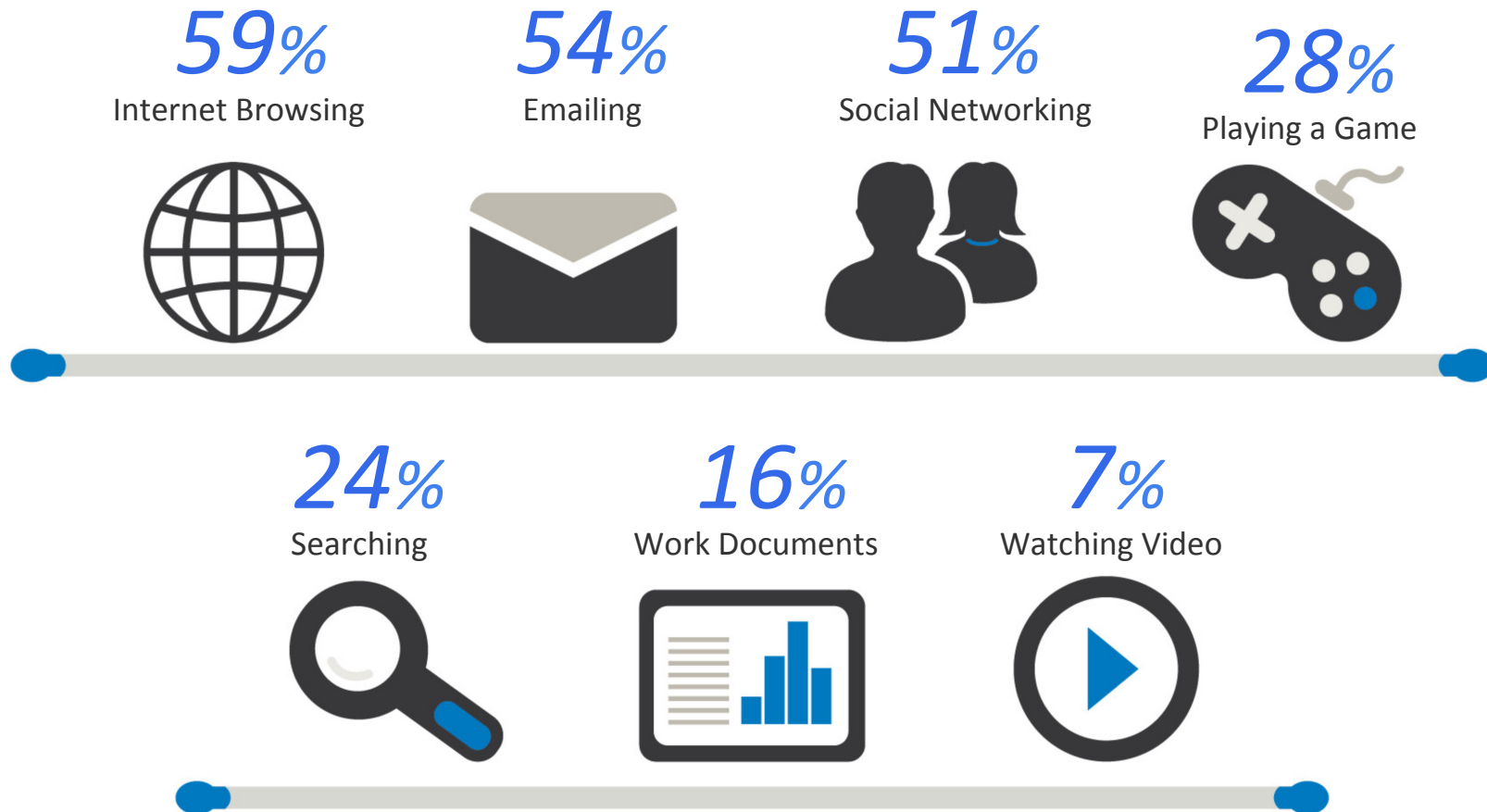
We use an average of three different screen combinations every day



Smartphones are the most frequent companion devices during simultaneous usage

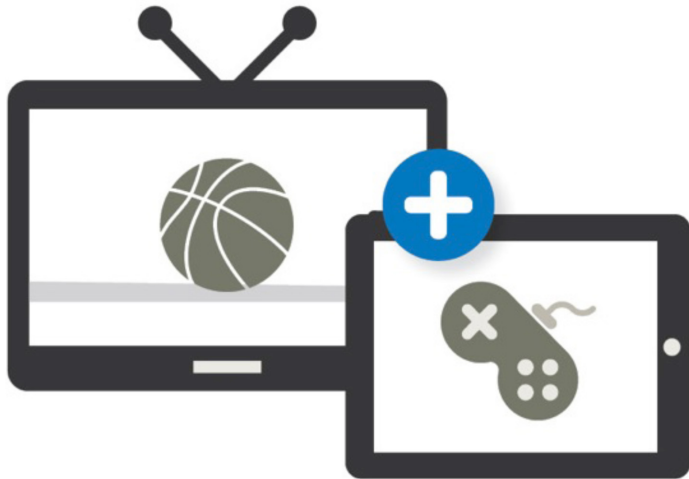


Top activities performed during simultaneous screen usage



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

75% of simultaneous usage is **multi-tasking**



Key multi-tasking device combinations



Base: Ever Use Devices at Same Time (floating bases) Q. Thinking about how you use each of these device combinations, please indicate how you use each combination most often. Do you mostly use the devices to multi-task (each device is used for a separate activity), to complement each other (to do the same or related activity), or to do both equally? Base: Total Answering Follow-Up Occasion – PC/Laptop: (171); Smartphone (328); Tablet (103). Q. Was the activity you were doing on your [SECONDARY DEVICE] related to your use of a [PRIMARY DEVICE]?

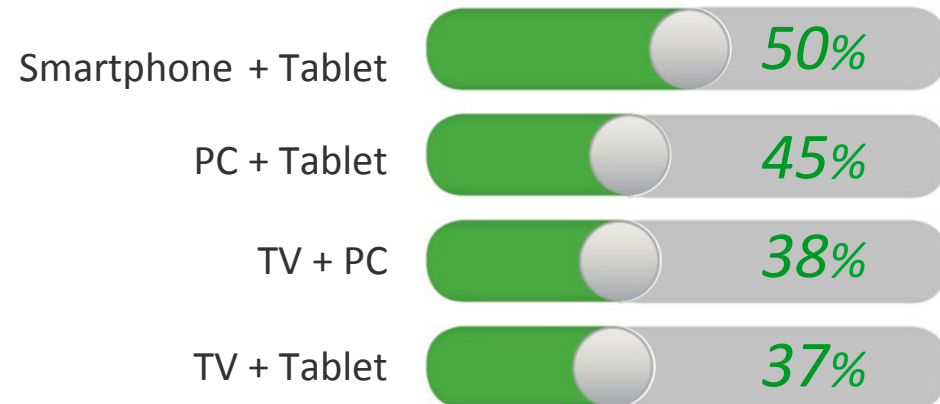


Consumers are also conducting complementary activities across screens



25% of simultaneous usage is **complementary**

Key complementary device combinations



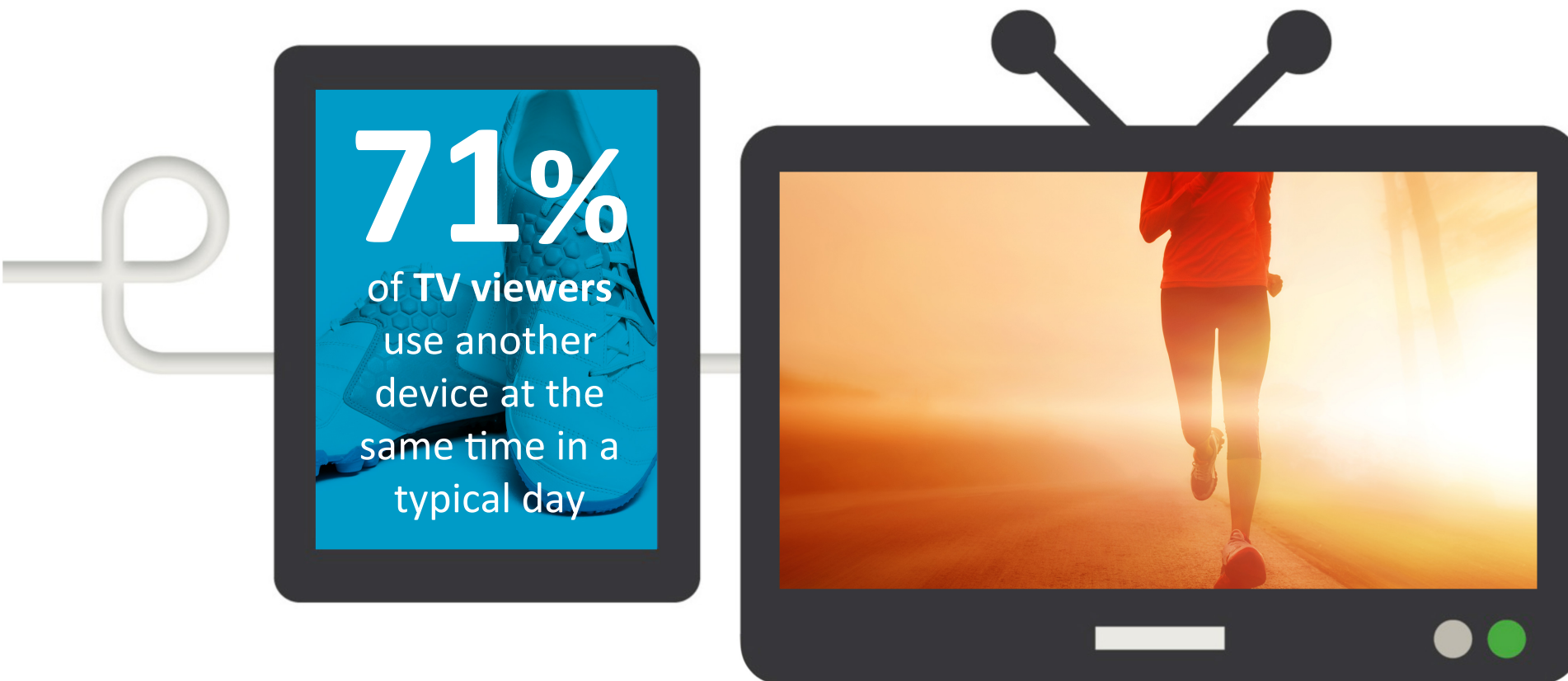
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The changing role of television in a multi-screen world



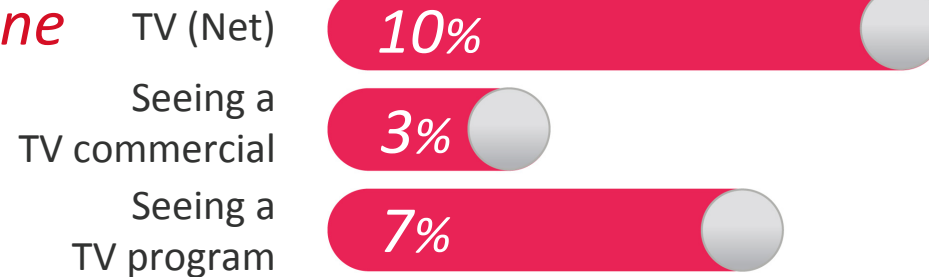
One device no longer commands our full attention



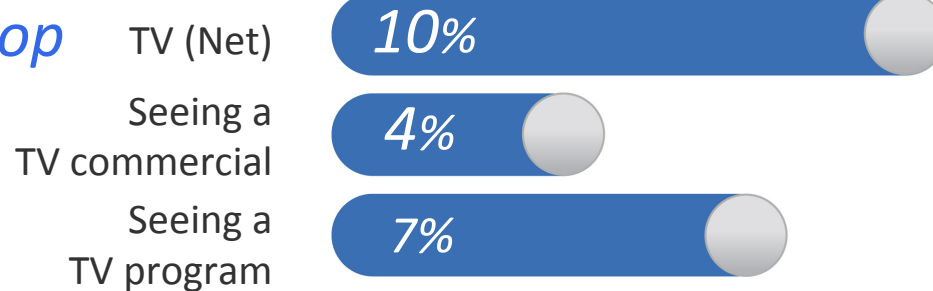
TV is a catalyst for search

Percent of search occasions that were prompted by television

Smartphone



PC/Laptop

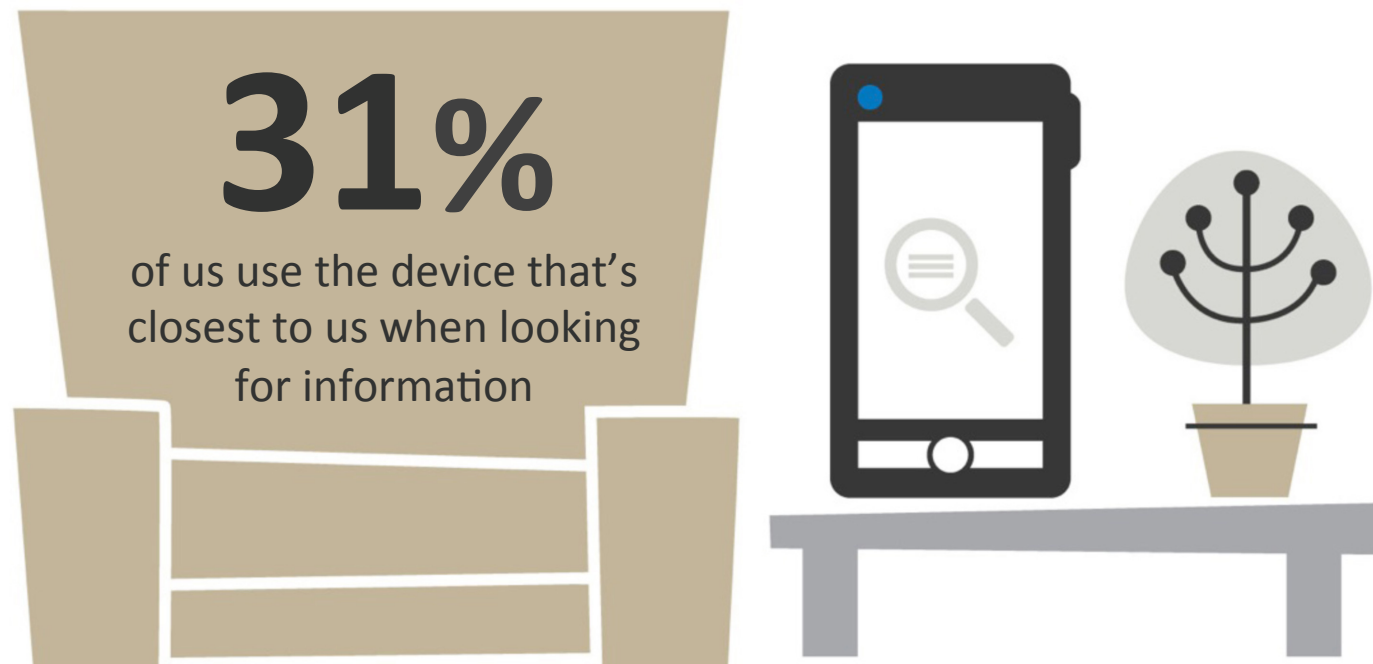


Spontaneous Device Usage



Many times we turn to the screen that's closest

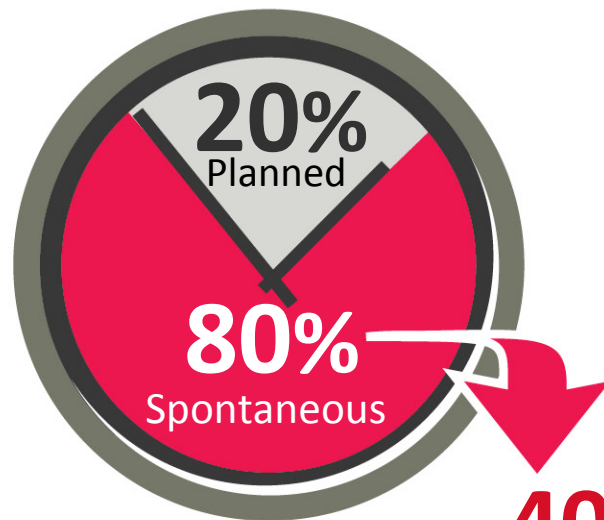
While we all have screen preferences for certain activities,
we are also creatures of convenience



We accomplish goals through spontaneous device usage

Spontaneous vs. Planned Search

Smartphone

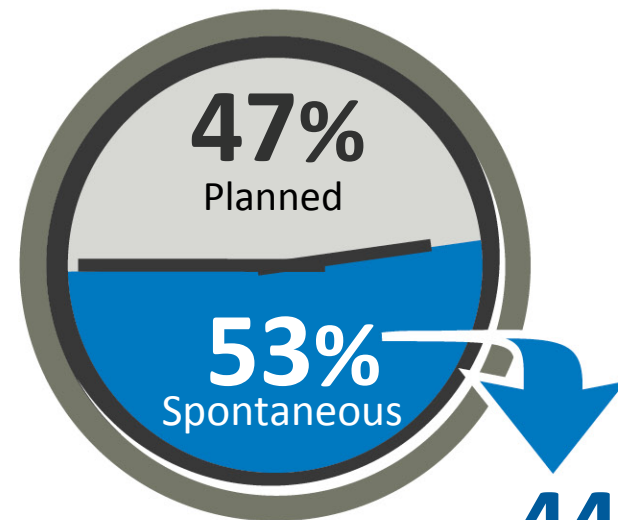


40%



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

PC/Laptop



44%



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

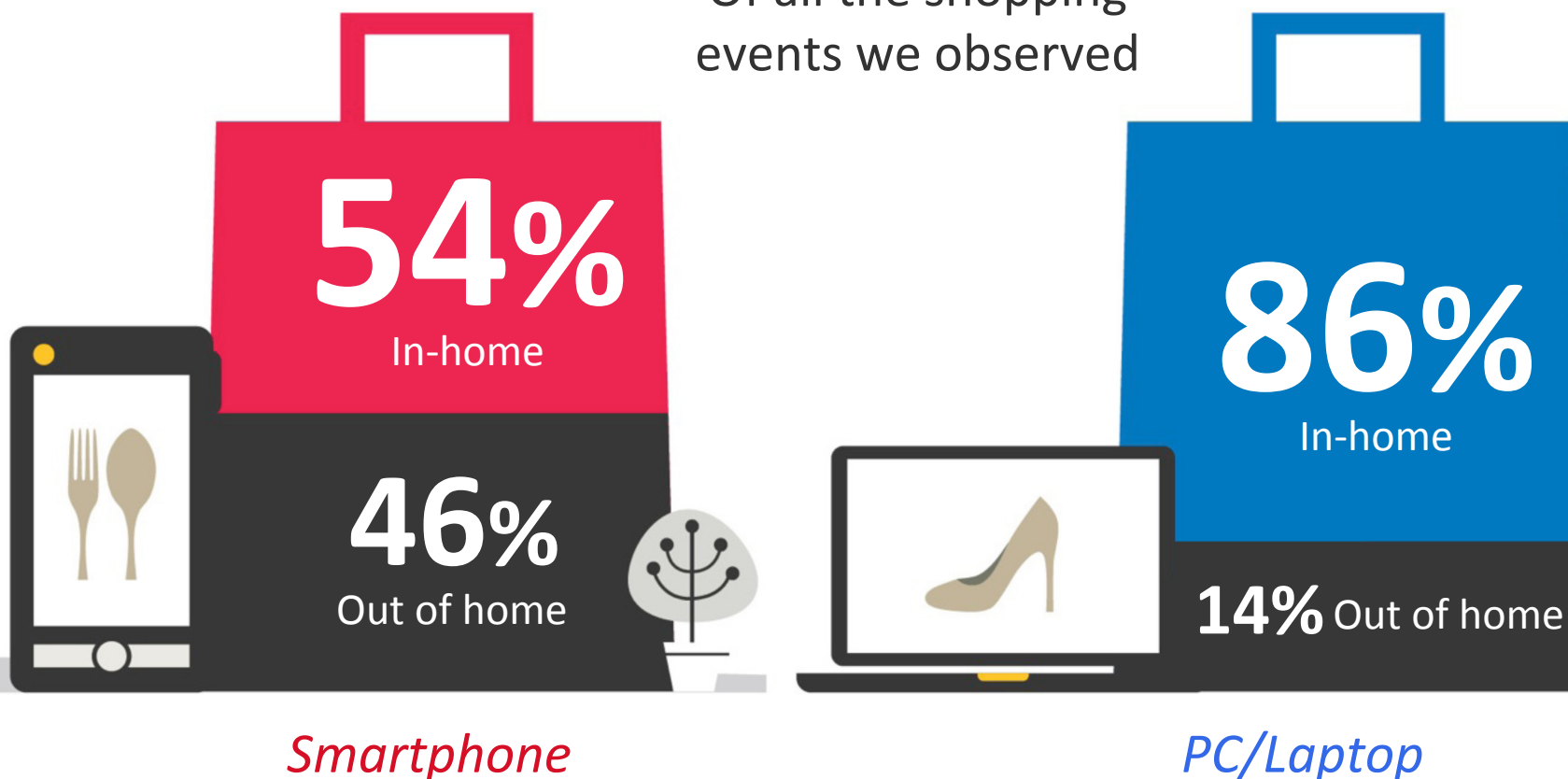


The multi-screen shopper



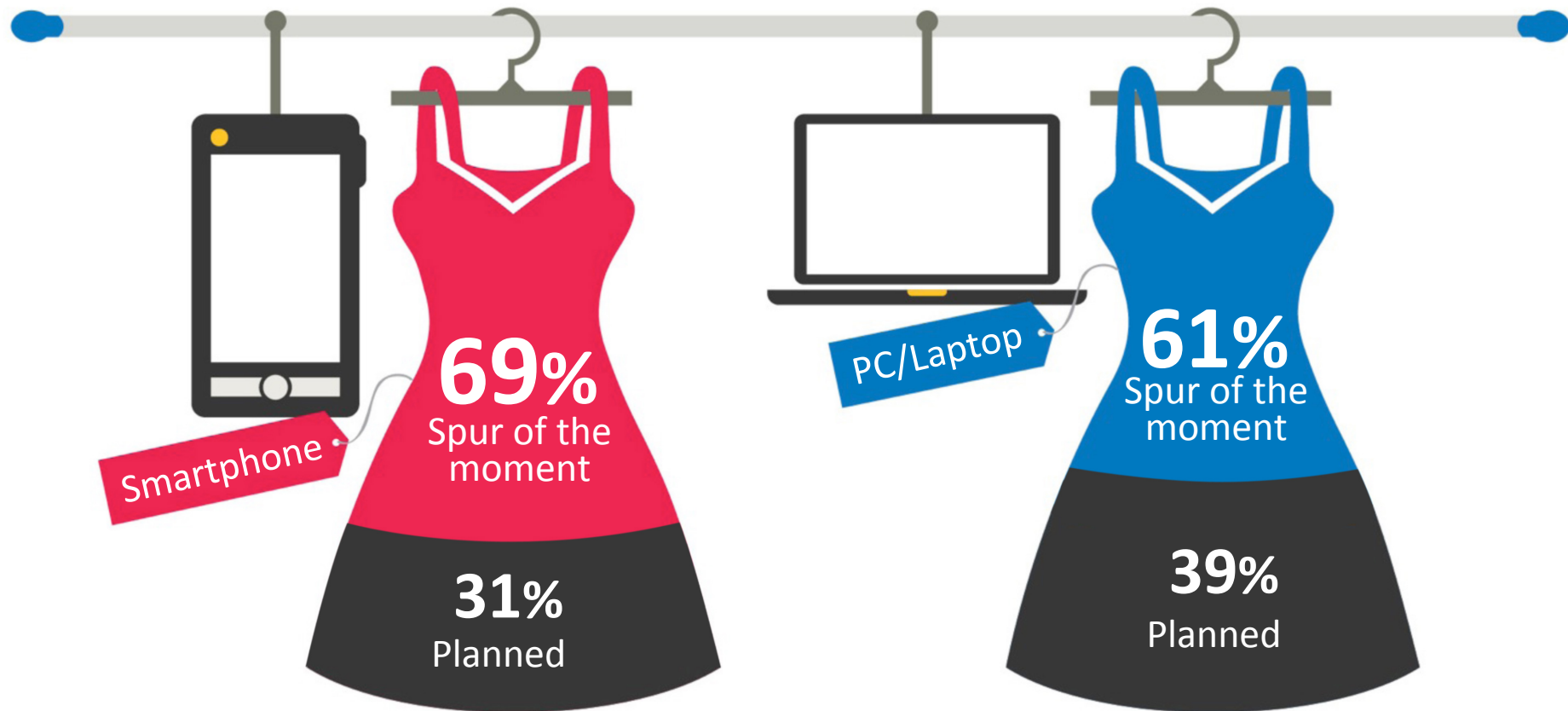
Smartphones allow us to shop at home or on-the-go

Of all the shopping
events we observed

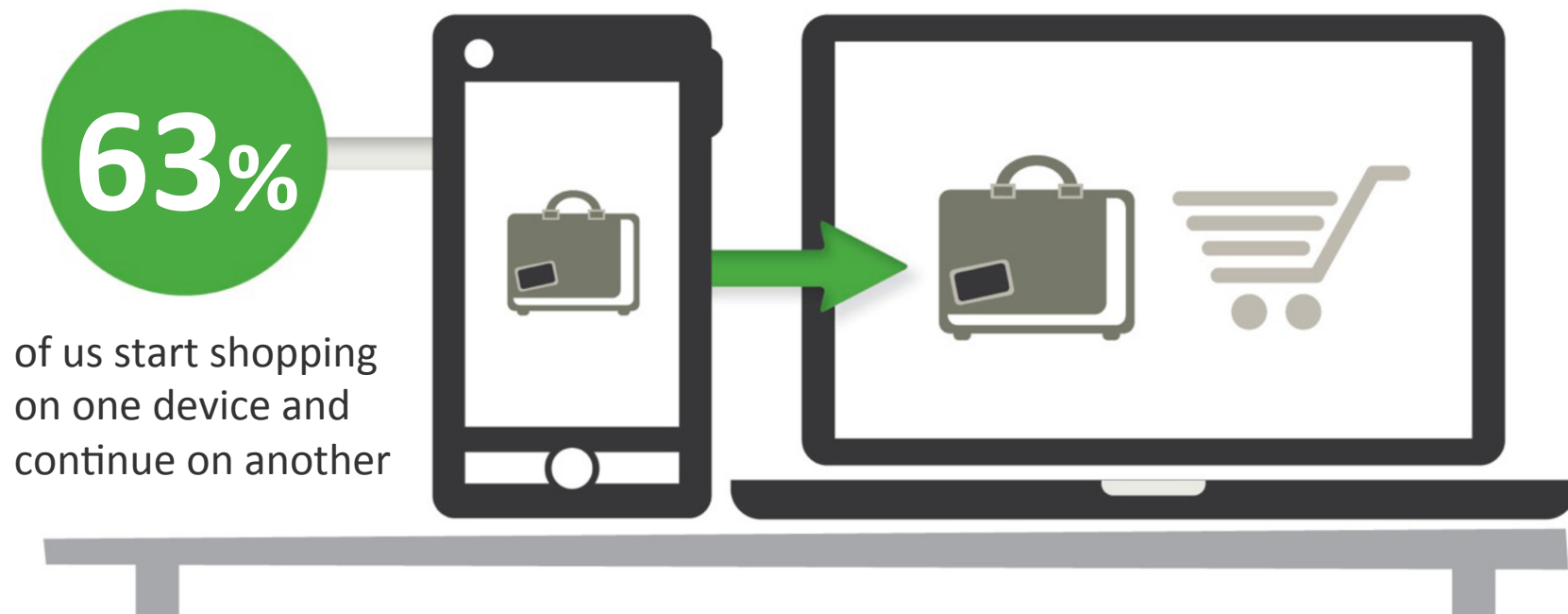


Spontaneity plays a major role in shopping

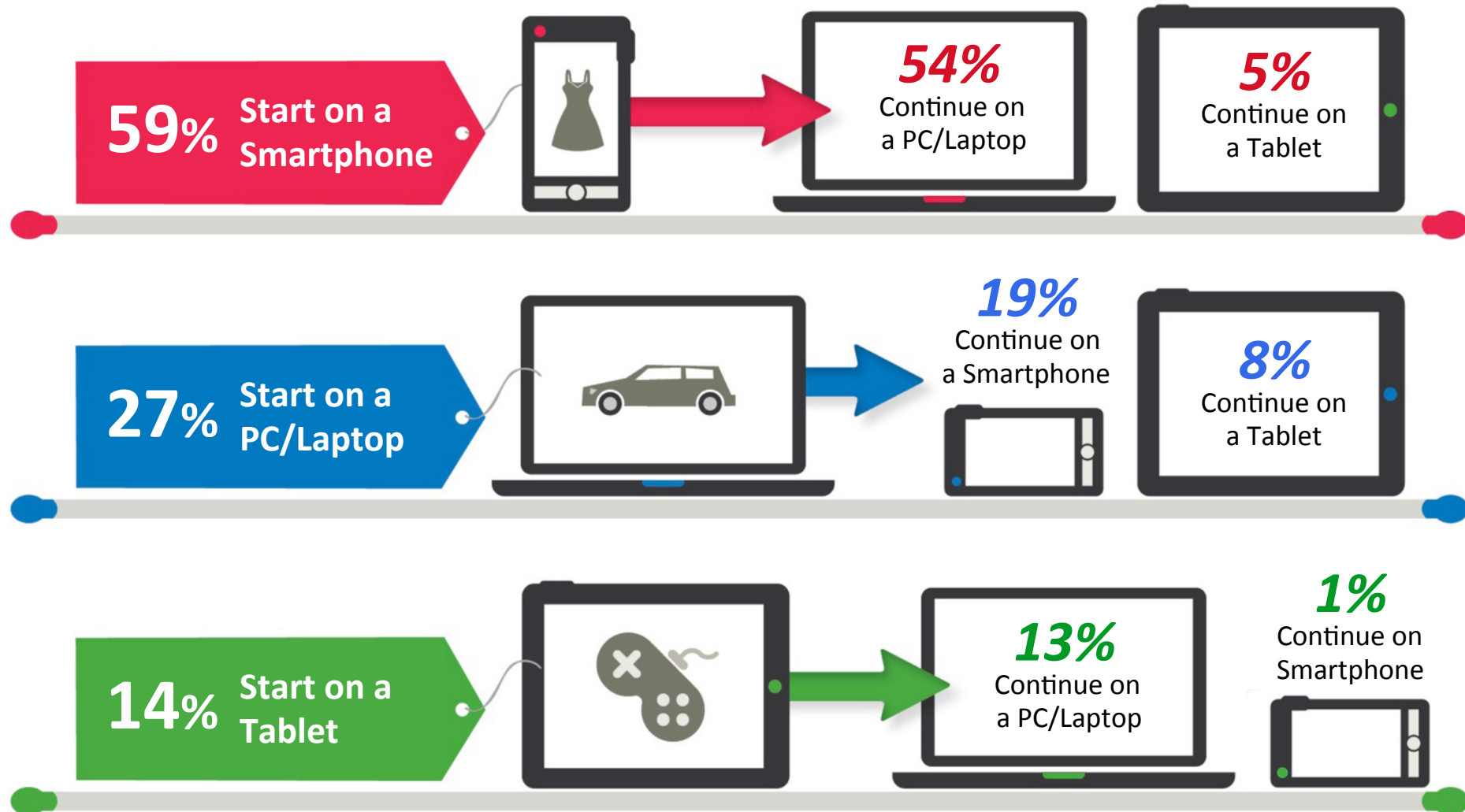
Spur-of-the-moment vs. Planned shopping



We often move from one screen to another while shopping



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 behaviour 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 optimise 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.

