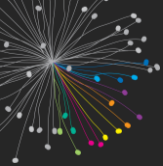


IAB Multi-Screen Research

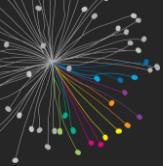


Research approach, sample, methodology

IDENTIFY & EXPLORE	Desk research, in-depth ethnographic and focus groups	<ul style="list-style-type: none">• Desk Research & workshop• 12 in-depth interviews in their homes/lives• 4 * 2 hour focus groups across spectrum of digital behaviours and levels of engagement/device ownership
MEASURE	Quantitative measurement and evaluation	<ul style="list-style-type: none">• Online 20 minute survey of n=2088 nationally representative across age gender, location• Have at least one screen (Smartphone, tablet, TV, laptop or PC)
VALIDATE	Quantitative Diary study	<ul style="list-style-type: none">• n=880 respondents completing the diary, each respondent completed the diary 3 times. In total there were n=2640 entries• Full weeks data, different participants complete over the different days and hours, over 300 entries across each of the 7 days of the week

*Comprehensive, robust methodology
Research conducted by Pollinate*



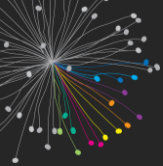


1. Listening to the TV screen is the new default TV screen consumption

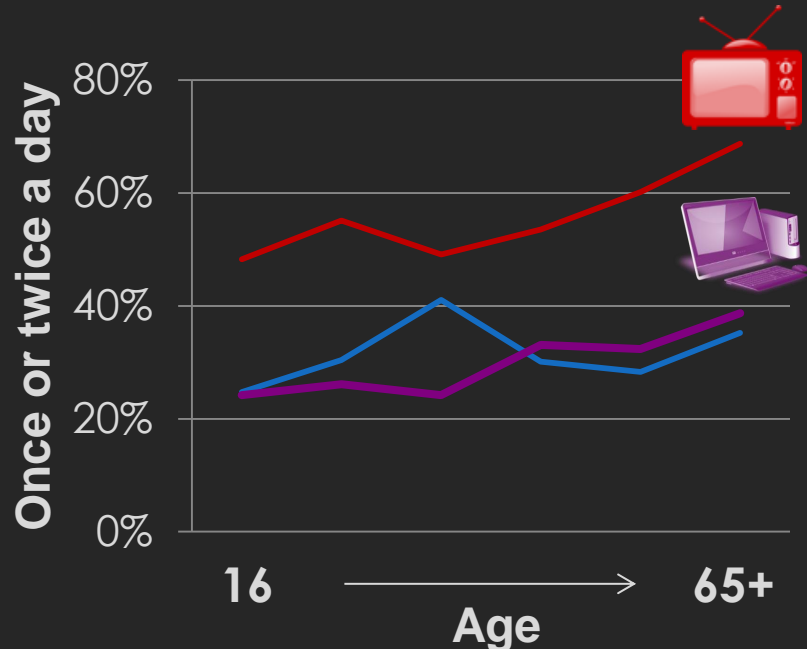
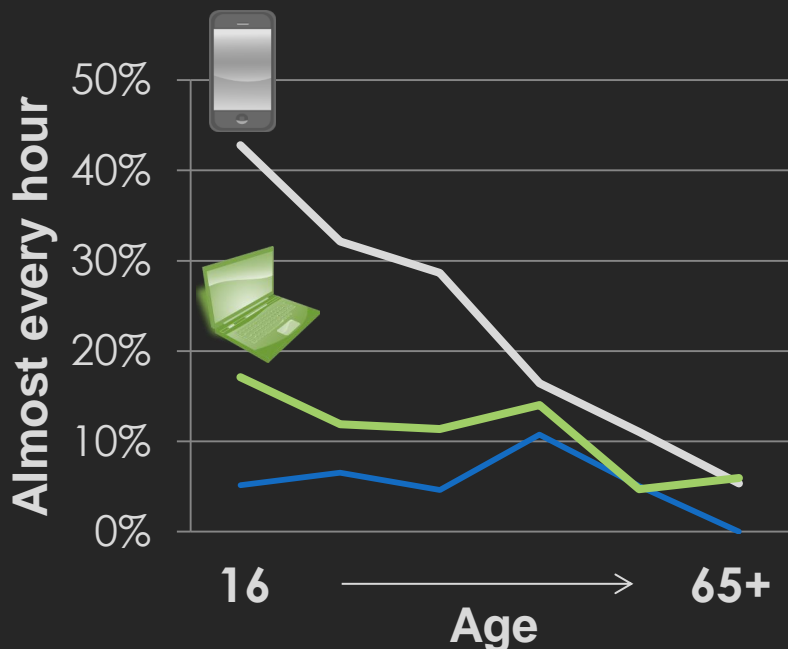
People are listening to the TV screen more than they are watching it

The OTS for youth is digital: half watch a TV screen less than once a day

Is TV the new radio? Digital makes it seen and shared



'Opportunity to see' differs dramatically by age across screen



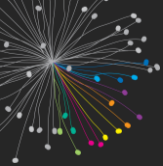
For younger people their greatest opportunity to see is digital

High frequency but short duration interactions

Infrequent but long duration interactions

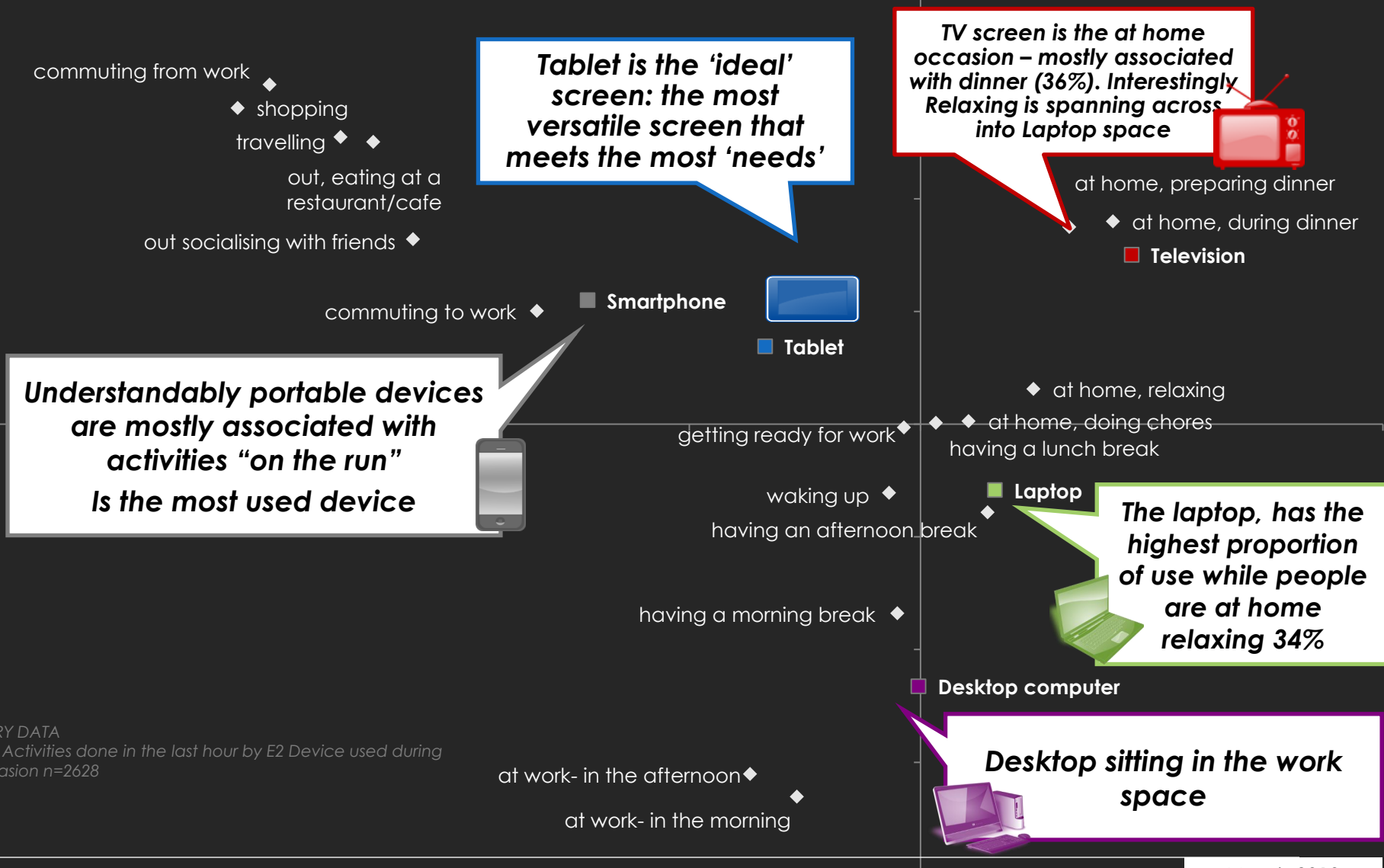
Note on **Tablets**: They show no strong discriminations either way

QB1 How often do you use each of the following devices? (Base: Smartphone n=1,347, Laptop n=1,663, Tablet n=649, Desktop n=1,453, TV n=1,860)



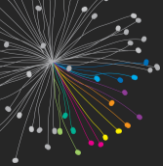
Occasions are principally defined by being mobile or still, 'active/working' or 'passive/play'

Dimension 2 (vertical 32%)

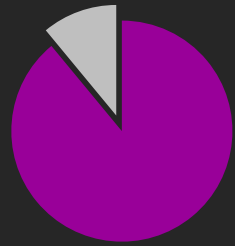


DIARY DATA
QE1 Activities done in the last hour by E2 Device used during occasion n=2628

Dimension 1 (horizontal 62%)



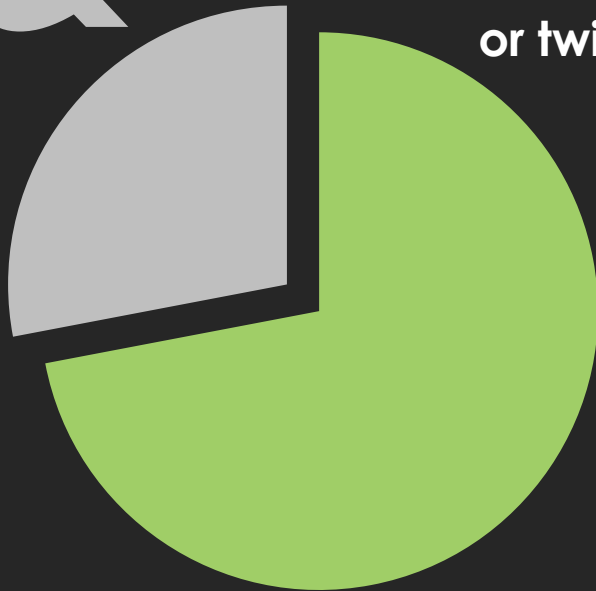
The only screen occasion that the TV screen still dominates is the evening 'gathering'



89% Still own a TV



72% of people still watch the TV once or twice a day



36% At home doing the chores

37% Relaxing on the couch

TV screen occasions seem to be all about relaxing and distracting



TV screen content is either news OR entertainment



Catching Up on news & events

Entertainment

Waking up/
getting ready
for work
58%



At home
preparing/ during
dinner
52%



Having a work
break
(morning/ arvo)
69%*



At home
relaxing
63%

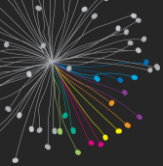


At home doing
the chores
52%



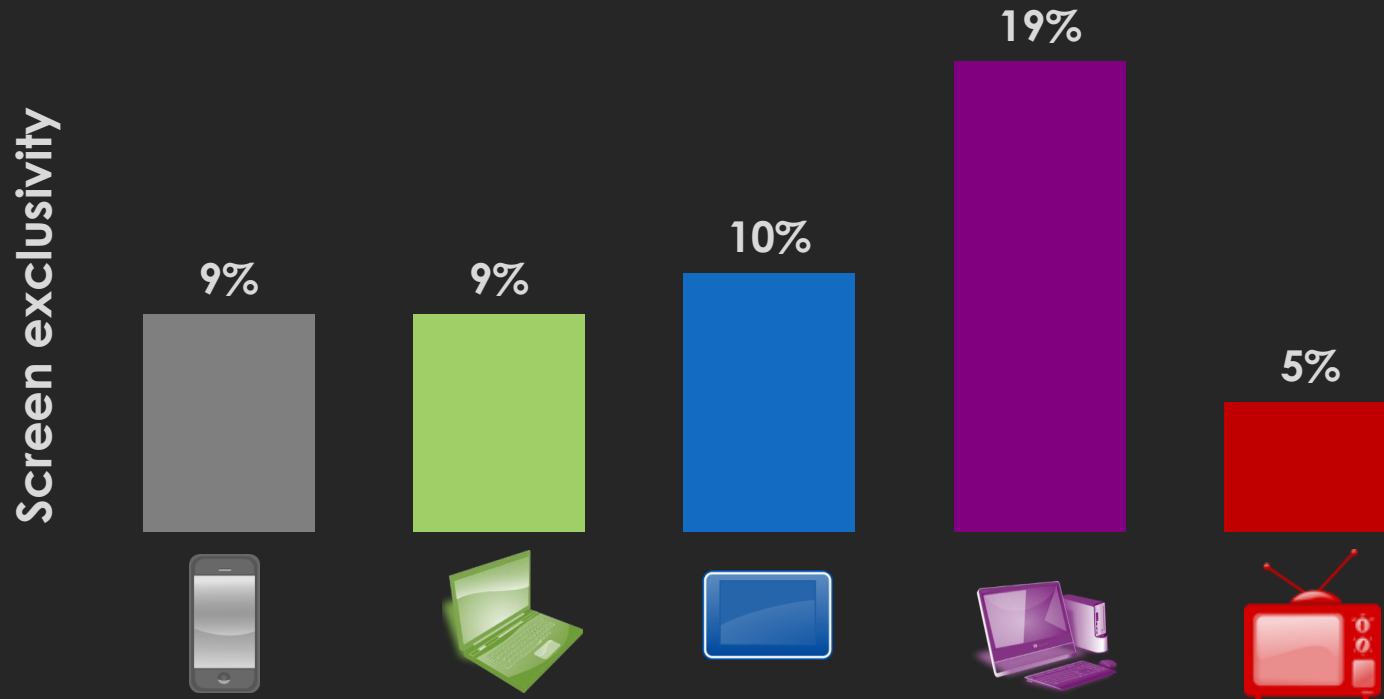
* NOTE: Is this TV on the "TV Box Screen" or TV viewed on another device?

The TV screen plays a role to help people transition their 'mood' from home to work or back again



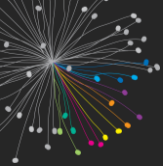
Most people 'do' multi screen behaviour (75%)

And only **5%** of those people watch TV without any other screens

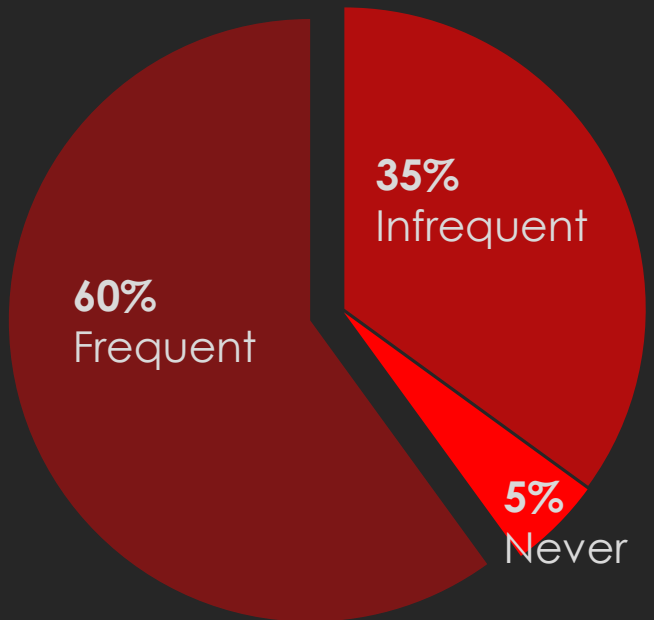


QB12-16 When using your SCREEN, how much of the time do you spend using each of the following devices? (Base: Smartphone n=1,347, Laptop n=1,663, Tablet n=649, Desktop n=1,453, TV n=1,860)*

The TV screen is the least likely screen to capture people's undivided attention



And attention to the TV is frequently shared with another screen



Screen share rate

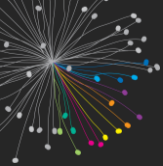
60% of people often use a second screen while using the TV screen

...and "**18%** of TV viewing is not TV content"
- Oztam

QB12-16 When using your SCREEN, how much of the time do you spend using each of the following devices? (Base: Smartphone n=1,347, Laptop n=1,663, Tablet n=649, Desktop n=1,453, TV n=1,860)

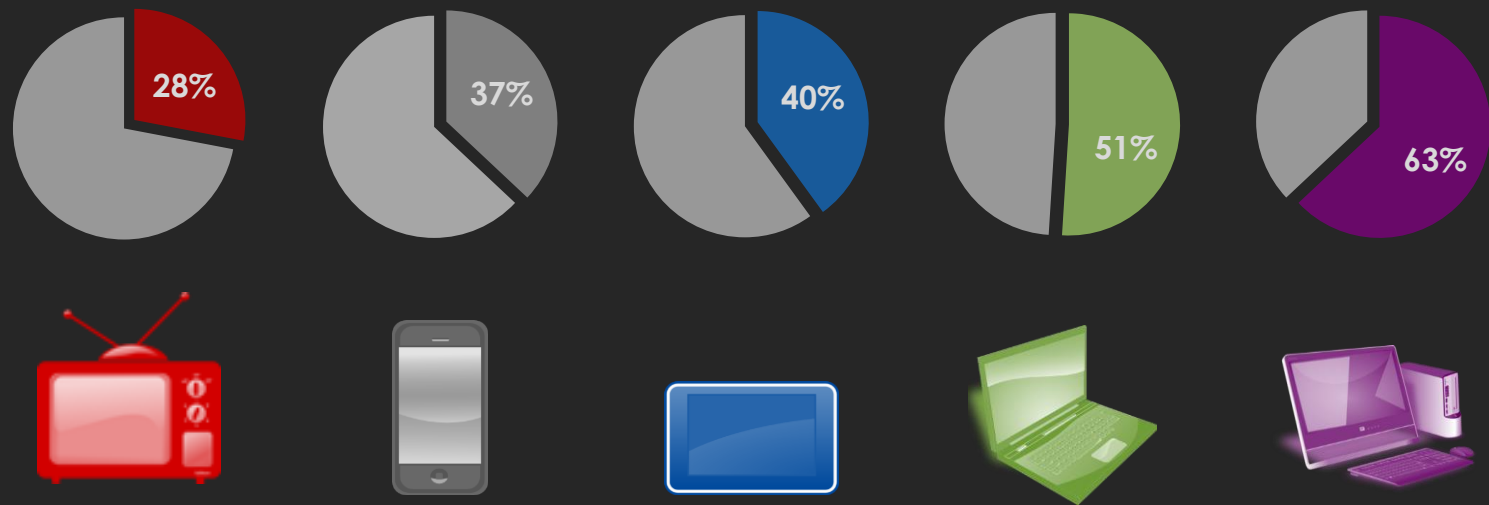
Is TV the new radio?

People don't watch the box, they listen to it whilst doing other things



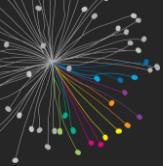
Attention is fragmented across all screens

Screen attention



DIARY DATA: QE7 Top 2 Box How engaged, or how much attention were you paying to what you were doing on each of the following devices while you were [INSERT OCCASION]. 7 point scale 1 giving it your full attention to 7 Was not paying attention at all

People pay the least attention to their TV screen but their attention to any screen is split.



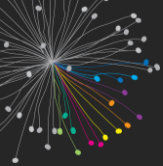
2. Multi-screen use is highest when the TV screen is on

People don't watch the TV screen: they listen to it

the OTS for youth is digital: half watch a TV screen less than once a day

Multi-screen use is highest whilst the TV screen is on: multi-screen is very much: TV + another screen

TV AND digital amplifies the message: without digital, will youth even notice?



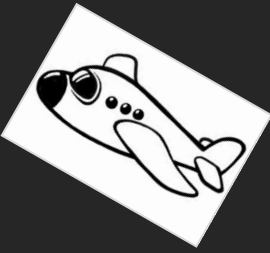
Multi device occasions are fairly static

Never



1% Commuting

1% Out socialising with friends



0% Travelling

0% Shopping



Occasionally



Having a break (morning or afternoon)

13% Preparing/eating dinner at home



10% Waking up/when getting ready for work

7% At home, doing the chores



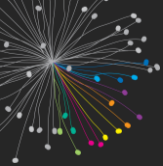
Often

40% At home Relaxing

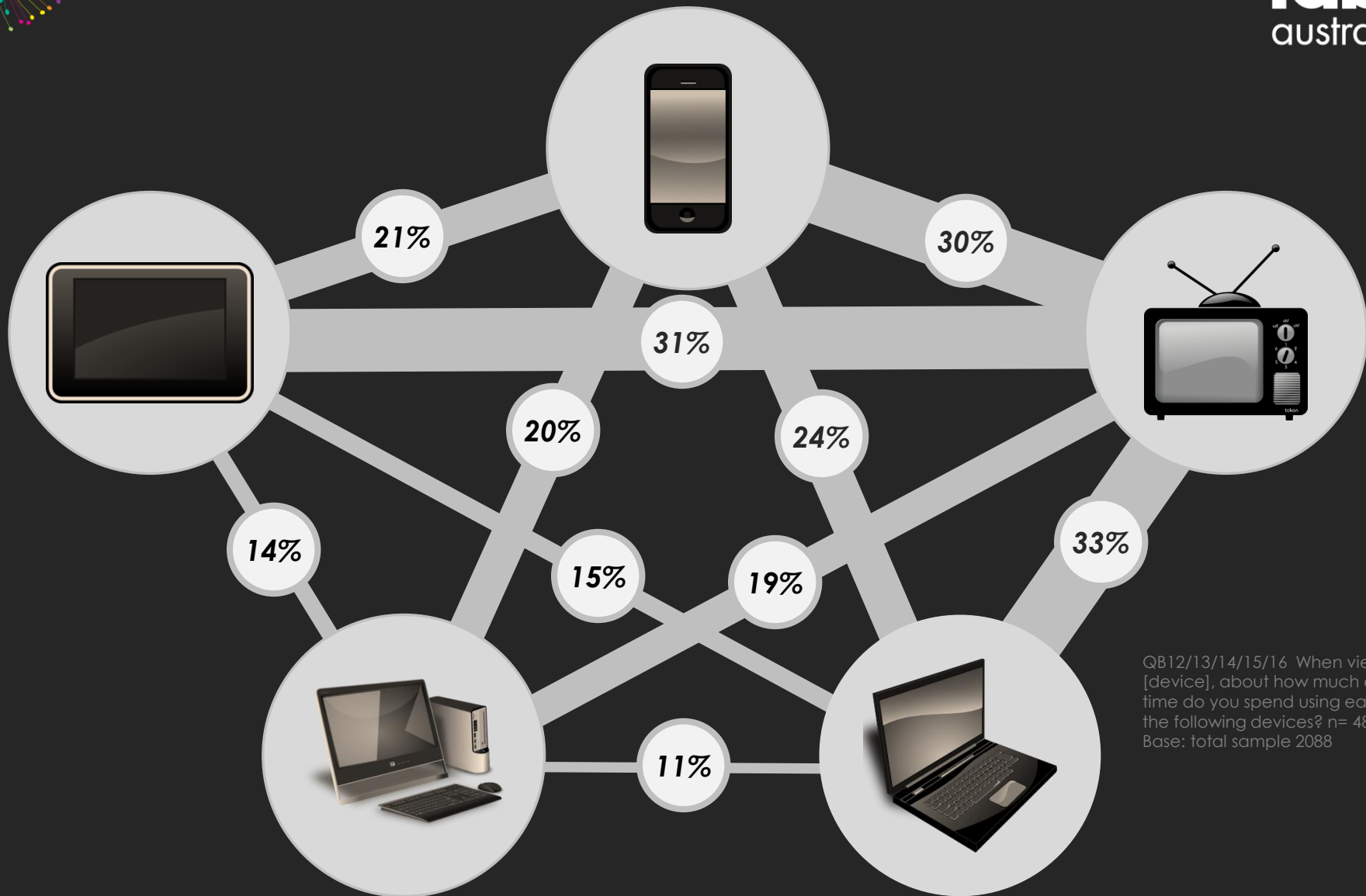


DIARY DATA: E1 Occasion by E3 Using multi-devices at the same time , n=326

Most mutli-device usage occurs while people are relaxing

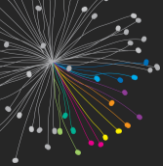


Mapping multi use relationships: TV is where they 'share'



QB12/13/14/15/16 When viewing [device], about how much of the time do you spend using each of the following devices? n= 485-2049, Base: total sample 2088

Multi-device use is predominantly TV + another screen



Multi-screen use amplifies the impact of the TV screen

15% of people watching TV **actively discuss** the ads and brands they see advertised on TV through social media

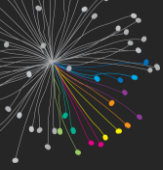
35% of people watching TV **actively discuss** the show they are watching on TV through social media



They provide TV advertising with a **amplification effect** through social media due to multi screen behaviour.

QB12B What do you typically use other devices for while watching TV? (Base n=1,124)

Digital amplifies the advertising messages from the TV screen



3. Women and FONK drive sharing of TV messages on social media

People don't watch the TV screen: they listen to it

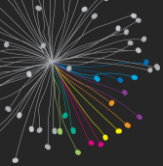
the OTS for youth is digital: half watch a TV screen less than once a day

Multi-screen use is highest whilst the TV screen is on: multi-screen is TV + another screen

Women drive multi-screen use whilst the TV is on: they are more social and phones/laptops facilitate sharing

FONK is the new 'FOMO': it's not knowing that matters, it's all about being in the know

Making it easy to 'know' matters: knowledge is social currency

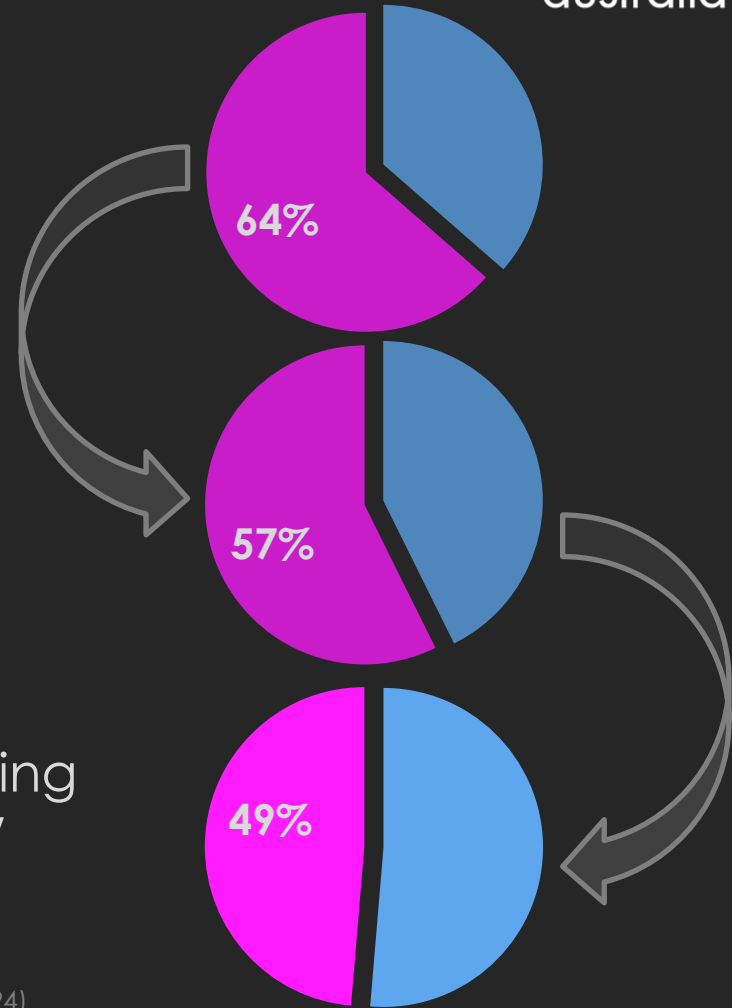


The social media amplification is driven by **women**

Using **Social media with the TV** screen is largely driven by women (64%)

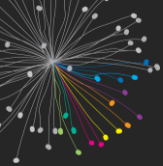
When looking at the social media driven by **TV content** itself the gender effect reduces (57%).

The female skew disappears when looking at social media advocacy driven by **TV advertising**

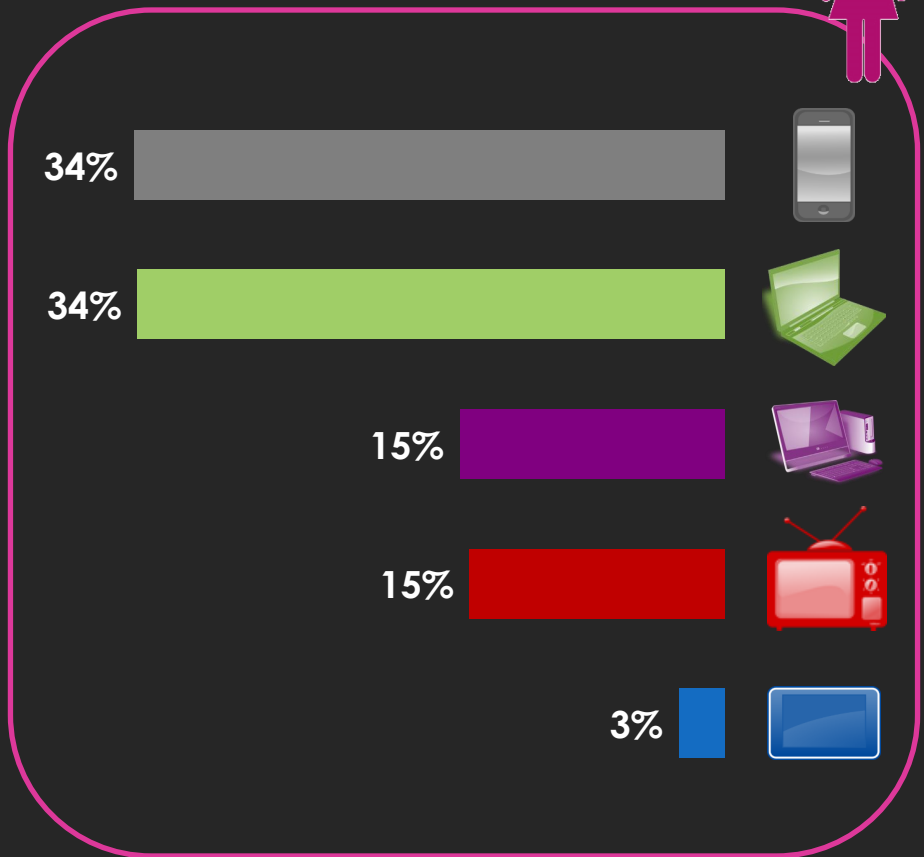
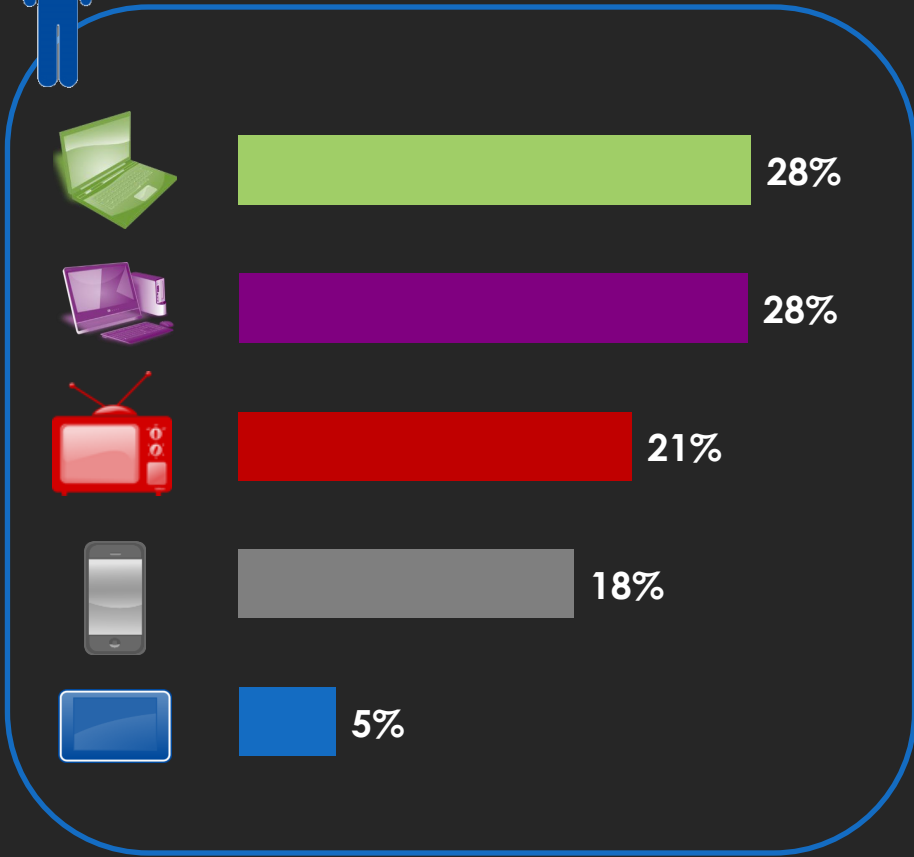


QB12B What do you typically use other devices for while watching TV? (Base n=1,124)

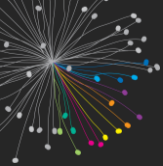
Social media use is highest amongst women but branded messages are not as prevalent in their social media conversations



If they could only own a single device...



**Portable sociability is a priority for women:
its all about being social, connecting and belonging**



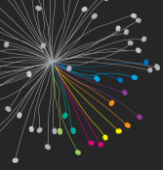
Why are women driving social media?

It's FONK.

The Fear Of Not Knowing

- Information has become social currency.
- FONK is the powerful force behind the thirst to know, the insatiable information gathering, in order to belong.
- FONK is not a thirst for knowledge. It is a need to be in the 'know'
- FONK drives FOMO, the anxiety of not belonging
- And because women are more social, they are more likely to have FONK

Perpetual information gathering and sharing defines people who have 'FONK'

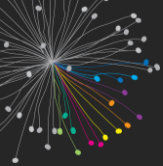


FONK is what people tell us is driving the frequency of social media use



“FONK. It’s a Fear Of Not Knowing. So if someone brings up something in conversation, say it’s the new iPhone, and I don’t know what its new features are I wouldn’t like that. I wouldn’t like to be in that conversation because I don’t know what they’re talking about. I want to know what they’re talking about because I’m a FONK.”

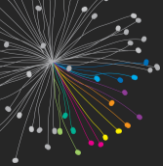
It’s knowing that allows people to belong. The knowledge itself is not important: they have to know, they have to check the phone...



4. 'TV' means content – not 'box'

People watch TV across all of their screens: TV means content

***TV is an interchangeable word: it's still the box to old people
but it's content to youth***



'TV' is screen agnostic



TV refers to the content, not "the box"



'TV' means content

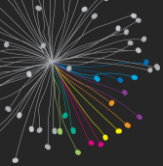
People don't watch **"the box"** ...

They watch **TV programs**

People match the content to the occasion and they have the screen to match



Screens are chosen based on occasion



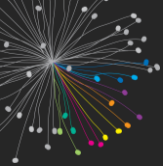
5. Ads work across all screens but differently

People interact more with ads seen on laptops/desktops than phones: it's a more active device

Ads in digital environments are seen as annoying interruptions: but most people do click through

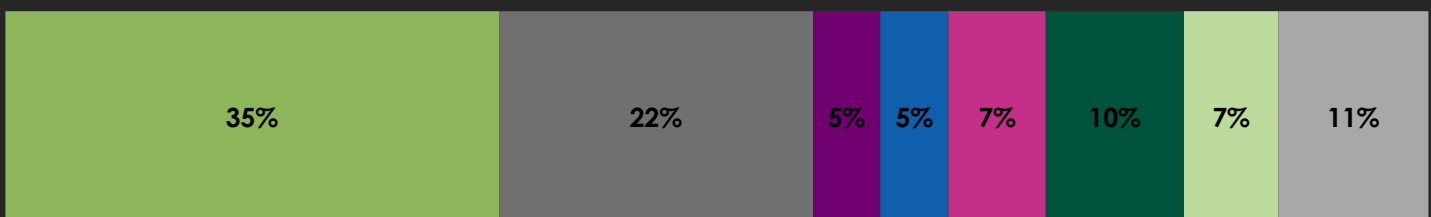
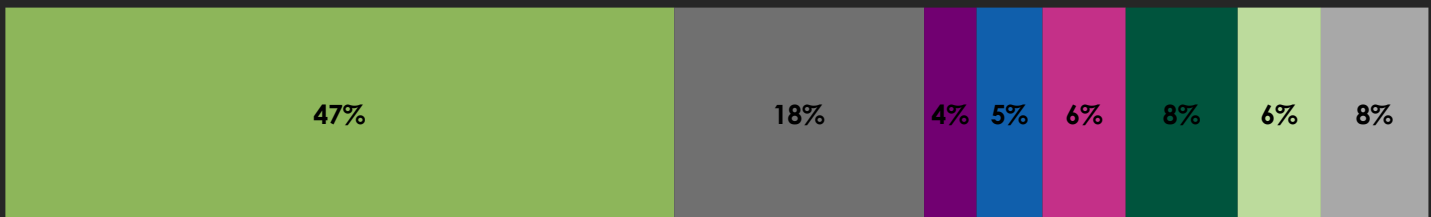
And digital clearly drives sales: from awareness and advocacy to attitude change and action

People are quite comfortable clicking through when the screen fits



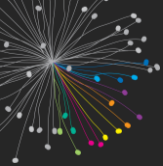
Frequency of interaction with ads

- Never
- Less often
- Once a month
- Once a fortnight
- Once a week
- A few times a week
- Once a day
- A few times a day



QD9 How often do you click/tap/interact with an advertisement on each of the following devices? n= 649 – 2-49

The majority of Smartphone users never interact with ads, with computer users interacting with ads the most



Different actions from seeing ads on different screens



27% Bought a product or service
24% Spoken to friends/family about product I saw advertised

% of people who have 'clicked through':

45%



16% Posted about a product / service online

% of people who have 'clicked through':

53%



Nothing significant



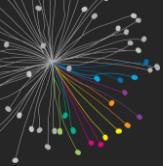
55% Searched online for a product / service
49% Learned more about a product / service
46% Found out about a new product of service
39% Clicked through an online ad

% of people who have 'clicked through':

65%

QD3C In the past 3 months which of the following have you done as a result of seeing an ad on each of the following devices? n= 485-2049

Mobile gets a high rate of attention but ads seen on different screens drive quite different behaviours



Advertising on various devices

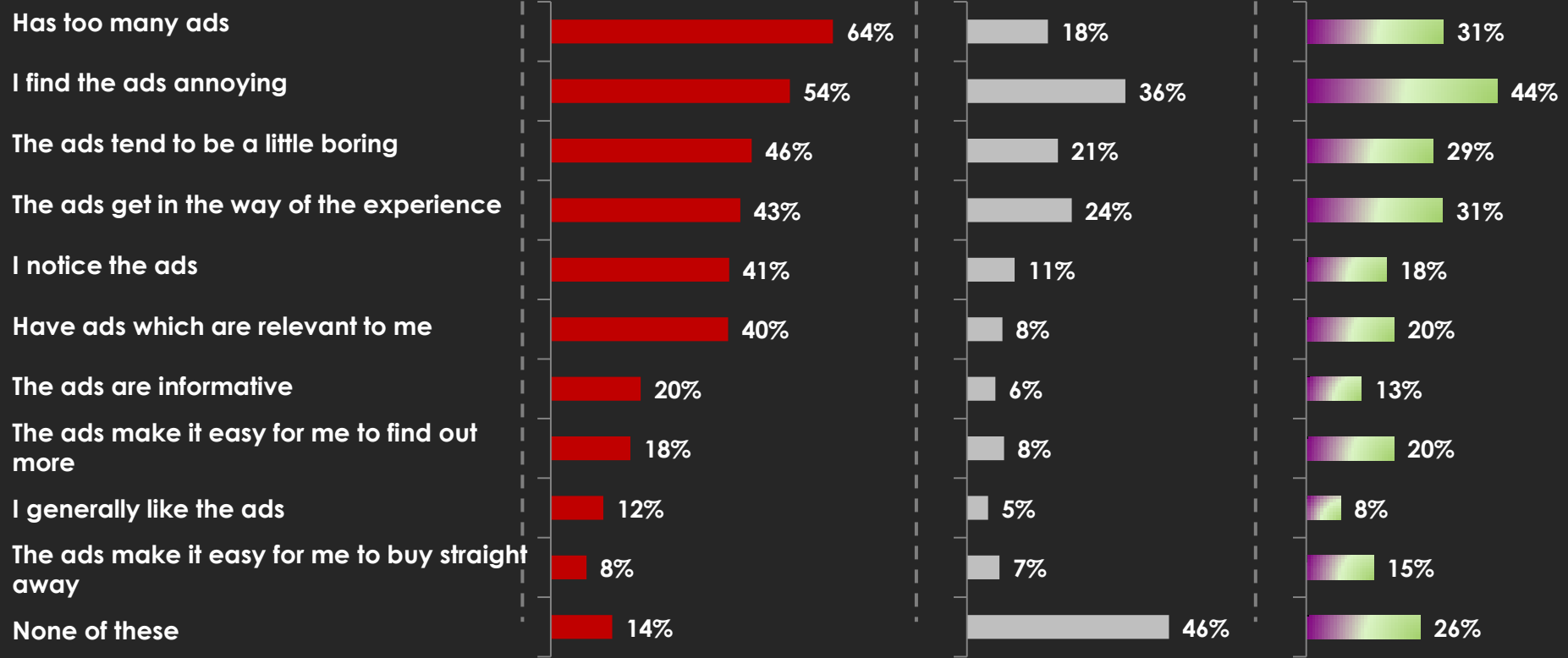
TV



Smartphone

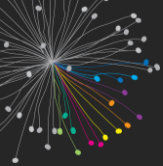


Computer



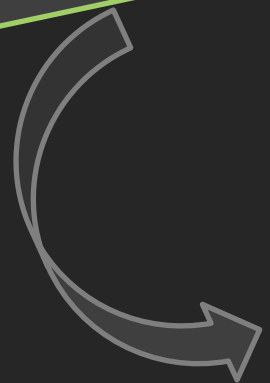
QD10C Statements about advertising on TV and online, click on the statements for the device you think is true. n=1180-2049

The majority of respondents don't believe that there are too many ads when using their computer, however, almost half find these ads annoying



But the consumer navigates between screens with ease: it is clear that digital drives purchase

"I felt frustrated knowing that the ad was popping up in front of my face but then it captured me in and made me aware that there is Sportsbet where you can bet on the NRL grand final online. I told my peers instantly (over email). When I got home I told my partner and he made a bet on the game and won! I like Sportsbet now"
- Native Family



"I felt frustrated knowing that the ad was popping up in front of my face but then it captured me in and made me aware that there is Sportsbet where you can bet on the NRL grand final online. I told my peers instantly (over email). When I got home I told my partner and he made a bet on the game and won! I like Sportsbet now"
- Native Family

AWARENESS
ADVOCACY
ADVOCACY
ACTION
ATTITUDE



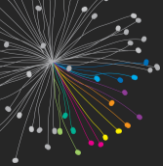
Further evidence for how digital drives all aspects of brand equity: from action to advocacy

"I saw a bright flashy ad for the iconic. There were some really nice looking bright pieces on there that looked interesting so I spoke about it with friends. Turns out that they were already using the site. The next time I went online I went to the site again and bought some shoes. I don't mind if it doesn't fit perfectly because my sister will happily take anything I can't wear off my hands"
Kim SINK

"I saw a bright flashy ad for the iconic. There were some really nice looking bright pieces on there that looked interesting so I spoke about it with friends. Turns out that they were already using the site. The next time I went online I went to the site again and bought some shoes. I don't mind if it doesn't fit perfectly because my sister will happily take anything I can't wear off my hands"
Kim SINK

AWARENESS **ADVOCACY**
ATTITUDE
ACTION
ADVOCACY





In summary:

People listen to the TV screen.

the OTS for youth is digital: half watch a TV screen less than once a day

Multi-screen use is highest whilst the TV screen is on: multi-screen is TV + another screen

Women drive multi-screen use whilst the TV is on: they are more social and phones/laptops facilitate sharing

FONK is the new 'FOMO': it's not knowing that matters, it's all about being in the know

People watch TV across all of their screens: TV means content

People interact more with ads seen on laptops/desktops than phones: it's a more active device

Ads in digital environments are seen as annoying interruptions: but most people do click through

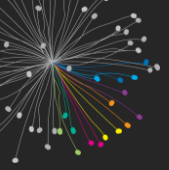
And digital clearly drives sales: from awareness and advocacy to attitude change and action



Why is this important?

- If they aren't watching the box **the ad they are listening to has to be integrated to the screen they are watching**
- They will only pass it on **if it is worth knowing**
- Women drive most of the social media: **miss the ladies, risk missing out**
- Multi-screen use happens around the TV screen: **the second screen amplifies the impact of TV**
- Youth watch TV on digital screens: **The second screen strategy should be the first line of attack for youth**
- People click through and buy on-line: **it is not click-through rate that matters, the consumer will wait until the time is right.**

Without a second screen strategy, the evidence suggests a media campaign will be second rate in terms of OTS and action



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