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 45, across 30 countries. Multiscreen users were defined as people who own, or have access to, a TV and/or a smartphone.
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 related content). 22% is stacking (simultaneous use for unrelated 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.
A comprehensive review of multiscreen marketing opportunities

**CONTENT OUTLINE**

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?
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

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>Laptop</th>
<th>Smartphone</th>
<th>Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL MINS:</td>
<td>113 minutes (27%)</td>
<td>147 minutes (35%)</td>
<td>108 minutes (26%)</td>
<td>50 minutes (12%)</td>
</tr>
</tbody>
</table>

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?
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.

<table>
<thead>
<tr>
<th>Device Key</th>
<th>TV</th>
<th>Laptop</th>
<th>Smartphone</th>
<th>Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Screen Minutes</td>
<td>113</td>
<td>108</td>
<td>147</td>
<td>50</td>
</tr>
<tr>
<td>2013 Media Spend</td>
<td>66%</td>
<td>29%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>2016 Media Spend</td>
<td>60%</td>
<td>29%</td>
<td>12%</td>
<td></td>
</tr>
</tbody>
</table>

*Source: ZenithOptimedia Advertising Expenditure Forecasts December 2013 (repercentaged within screen media)
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).

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

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

**Shifting:** At different points in time

**Total Mins:** 417

**Net Mins:** 308
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.

**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

**Total Mins:** 417

**Net Mins:** 308
**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.

<table>
<thead>
<tr>
<th>Country</th>
<th>Meshing</th>
<th>Stacking</th>
<th>Shifting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thailand</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phillipines</td>
<td></td>
<td>53%</td>
<td></td>
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<tr>
<td>South Korea</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Turkey</td>
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<td></td>
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<td>Czech</td>
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<td></td>
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<tr>
<td>Indonesia</td>
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<td>China</td>
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<td>Poland</td>
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<td>Slovakia</td>
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<td>Colombia</td>
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<td>Germany</td>
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<td>Mexico</td>
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<td>Russia</td>
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<td>USA</td>
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<td>Brazil</td>
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<td>Vietnam</td>
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<td>Nigeria</td>
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<td>Australia</td>
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<td>Japan</td>
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<td>Canada</td>
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<tr>
<td>Italy</td>
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<td></td>
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<tr>
<td>Hungary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saudi</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Argentina</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>France</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Usage Key**
- **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
- **Shifting**: At the same time as you were watching TV yesterday, how much time did you also spend using the Internet
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?
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?
HOW DO SCREENS INTERACT?
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

<table>
<thead>
<tr>
<th>Device</th>
<th>TV</th>
<th>Laptop</th>
<th>Smartphone</th>
<th>Tablet</th>
</tr>
</thead>
</table>

AT THE SAME TIME

- 54 MINS (37%)
- 31 MINS (29%)
- 24 MINS (49%)
- 25 MINS (51%)

AT DIFFERENT POINTS IN TIME

- 77 MINS (71%)
- 93 MINS (63%)
### 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.

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>LAPTOP</th>
<th>SMARTPHONE</th>
<th>TABLET</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET (ANY START %)</td>
<td>57</td>
<td>28</td>
<td>33</td>
<td>13</td>
</tr>
<tr>
<td>NET (ANY CONTINUE %)</td>
<td>25</td>
<td>40</td>
<td>50</td>
<td>25</td>
</tr>
</tbody>
</table>

*In which of the following ways do you sometimes shift the same task from one device to another at a later time? (By a task, we mean things like watching a show or video, searching for information, shopping, planning a trip or social networking)*
SEQUENCES OF SCREEN SHIFTING (RELATED CONTENT)

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)

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.
WHAT DO PEOPLE THINK OF MULTISCREEN MARKETING?
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.

<table>
<thead>
<tr>
<th>Format</th>
<th>VERY/SOMEWHAT FAVORABLE %</th>
<th>PAY AT LEAST SOME ATTENTION %</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
<td>41</td>
<td>72</td>
</tr>
<tr>
<td>Laptop</td>
<td>25</td>
<td>52</td>
</tr>
<tr>
<td>Smartphone</td>
<td>24</td>
<td>51</td>
</tr>
<tr>
<td>Tablet</td>
<td>23</td>
<td>52</td>
</tr>
</tbody>
</table>

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

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

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

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)
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.

What do you think a brand is trying to tell you when it advertises in each of these places?
EACH DIGITAL DEVICE CAN PLAY MULTIPLE ROLES, BUT HAS A “SWEET SPOT” FOR MULTISCREEN EXPERIENCES

**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

**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

**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

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

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)
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 |

Source: Millward Brown’s MarketNorms database (1,968 online campaigns and 317 mobile campaigns through Q4-13)
MULTISCREEN TYPOLOGIES
SEGMENTATION ANALYSIS HAS REVEALED SIX UNIVERSAL MULTISCREEN TYPOLOGIES

- **Digital Dynamos**: 8%
- **MEGA Multiscreeners**: 6%
- **Couch Chatters**: 10%
- **Phonistas**: 19%
- **Laptop OPERATI**: 15%
- **Passivists**: 42%
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 per device.
Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)
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.

<table>
<thead>
<tr>
<th>DEFINED BY:</th>
<th>WHO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>High use of TV and smartphone</td>
<td>More female</td>
</tr>
<tr>
<td>Similarly more positive towards TV and phone ads</td>
<td>More common in Kenya, Nigeria</td>
</tr>
<tr>
<td></td>
<td>U.S., UK and Germany</td>
</tr>
</tbody>
</table>

**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
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

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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.

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

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

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

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

“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.”

“I liked that Domino’s was on TV and on the X Factor app at the same time. They also had a game too.”

“Domino’s adverts on X Factor made me more interested in their products.”
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.

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.

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

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.

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

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<th>MULTISCREEN = MULTIPARTNER</th>
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### 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
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.

“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.”

“It’s not surprising that smartphone minutes are higher than TV minutes among smartphone users. That’s the new daily reality.”

“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.”

“I’m not surprised that mobile ad favorability is lower. This is why we have developed specific mobile approaches.”

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.

“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.”

“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.”

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

“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.”

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

SMARTPHONE PENETRATION
SAMPLE REPRESENTIVITY BY COUNTRY

By conducting AdReaction 2014 among 16-45 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 18-45 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