

Connected experiences

Cross-Screen Engagement:

Multi-screen pathways reveal new opportunities for marketers to reach and engage consumers

As attention shifts from evening primetime to 'always-on' screen time, consumers are combining devices in new ways to multi-task, amplify experiences, share and connect with others and get things done. New research reveals four common multi-screen pathways and the underlying consumer needs that drive each one. Understanding the motivations behind these behaviors can help marketers gain digital advantage through authentic interaction with customers under a new set of 'always-on' rules.

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Executive summary

Consumers are increasingly reliant on laptops, mobile phones, tablets and gaming consoles for inspiration, information, communication and entertainment. The hyper-mobility and seamless connection among these devices is changing the way publishers drive content—and consequently, the way businesses shift marketing dollars.

Individual screens provide a device-driven layer of context that affects how consumers absorb and react to content. As a result, marketers must now take a multi-layered approach to content distribution, one that enables portable, personal and interactive engagement across devices. Understanding the consumer motivations underlying cross-screen engagement is therefore a critical part of planning and executing multi-channel marketing campaigns.



Key take-aways

1. Four pathways of multi-screening behavior exist, with distinct motivations behind each: Content Grazing (68%: separate multi-tasking or 'distraction behavior'), Investigative Spider-Webbing (57%: simultaneous, information- & discovery-driven), Social Spider-Webbing (39%: simultaneous, connection and sharing), and Quantum (46%: sequential, intent-based).
2. Consumers relate to each device in unique ways; Carl Jung's archetypes can help marketers adjust messaging to meet the consumer's mindset. The television is 'The Everyman', the computer is 'The Sage' and the mobile is 'The Lover'. The new Cross-Screen Engagement study introduces 'The Jester' as the gaming console, the e-reader as 'The Dreamer' and the tablet as 'The Explorer'.
3. It's now critical that marketers take a holistic view of their content strategy, one where they pivot to the consumer need-state driving multi-screen behavior, while also adjusting content to fit the context of each screen.

Cont...

4. While each archetype illustrates unique motivations and behaviors, screens are no longer used in isolation. Multi-screening, including sequential, simultaneous and separate usage, is increasingly the default mode for consumers. In fact, seven out of 10 consumers use a second device in some capacity while watching television.

5. Consumers are connected for nearly all their waking hours: mornings tend to be reserved for task-based, orientation activities, while evenings are more reflective, emotive and open. Marketers should tailor their messaging throughout the day, while shifting from traditional 'primetime' moments to meeting consumers in their moment.

It's now critical that marketers take a holistic view of their content strategy, one where they pivot to the consumer need-state driving multi-screen behavior, while also adjusting the content to fit the context of each screen.

6. The behaviors and motivations are similar across the five markets studied, though cultural and infrastructure differences drive some distinct attitudinal variances. In Australia, Brazil and Canada, consumers view technology as adding significant value to their lives, while in the UK and US, there is some resentment related to the 'always-on' mentality. And in fact, 48% of consumers across all five markets say they miss the days when they could do just one thing at once.

7. Finally, multi-screening consumers are open to the right kind of advertising: 74% agree that "Advertising can be helpful in telling me about new products or brands that might interest me," while 87% of consumers agree that "It's great that I can check out products or brands that interest me whenever or wherever I see them."





Approach and methodology

To uncover new insights around multi-screen behavior, we took a two-phased approach. For the qualitative discovery phase, we interviewed early adopters in big city markets. For the quantitative phase, we validated our qualitative patterns using market-representative panels.


Qualitative

We partnered with Flamingo Research to recruit consumers aged 18-54 who owned multiple devices (a mix of smartphones, tablets, e-readers, gaming consoles and laptops) and used a second screen on a daily basis. They participated in eight digital diaries for five days across large cities in five markets: Sydney, Australia; Sao Paulo, Brazil; Toronto, Canada; London, UK and Chicago, USA. The four most compelling respondents in each market also participated in in-home ethnographies. Finally, we conducted two “leading edge” group interviews in the US, UK and Brazil for consumers aged 26-35 and 36-50 in order to establish super users whose behavior and motivations would indicate future adoption.

Quantitative

The quantitative portion of the study included approximately 1000 consumers aged 18>65 in the US and UK respectively, as well as approximately 500 consumers in Brazil, Australia and Canada for a total of 3586 consumers globally. We partnered with Ipsos OTX to use a representative market sample via panel and required that consumers own a representative mix of devices (smartphones, tablets, gaming consoles and laptops). We analyzed the results throughout February 2013.

To uncover deeper motivations and need-states behind each multi-screen pathway, we asked consumers a series of questions related to their reasons for multi-screening, activities while multi-screening and their deeper motivations while multi-screening. We define these motivations or need-states (seen in charts on pages 6 & 7) as follows:

Motivations	Feeling/Phrase	
 Enjoyment	Like anything is possible Daring A sense of fun, enjoyment	Laughter, comedy, humor Joy or happiness
 Conviviality	Joy or happiness A feeling of community or neighborliness	Like I can let my guard down or be silly A sense of togetherness
 Belonging	A sense of togetherness A sense of comfort	Reassured
 Security	Reassured A feeling of trust	Simplicity Safe
 Control	Safe In control Organized and on top of things	Like I am being technologically advanced
 Recognition	Like I am being technologically advanced Unique or standing out from the crowd	Expert Pioneering A sense of pride in achievement
 Power	A sense of pride in achievement A sense of commitment	A feeling of strength The buzz of achievement
 Vitality	The buzz of achievement On top of the world An adrenaline rush	A feeling of being alive In awe of aware of what's possible in the world

We also refer to Carl Jung's archetypes throughout the study, defined in the questionnaire as:



Innocent:

Romantic, optimistic, a dreamer.
Wants simply to be happy and to do things right.



Regular guy/gal:

A good neighbor, an everyman.
Wants to connect with others and belong to society.



Explorer:

An adventurer, individualist, wanderer.
Wants to be free to find out who she is, doesn't want to be trapped.



Lover:

A friend, enthusiast, team builder.
Wants to develop relationships and share experiences.



Sage:

Thinker, researcher, scholar. Wants to discover the truth, understanding the world through analysis.



Jester:

A joker, entertainer, prankster.
Wants to live in the moment with full enjoyment.



Hero:

Soldier, athlete, rescuer.
Wants to show one's worth and improve the world through action.



Caregiver:

An altruist, helper, supporter.
Wants to help people and protect them from harm.



Outlaw:

Rebel, revolutionary, outsider.
Wants to undo what's not working and revolt against the stale, boring normal.



Creator:

An artist, inventor, dreamer.
Wants to create something of enduring value, giving form to a vision.



Magician:

Visionary, innovator, mediator.
Wants to know how the world works and make dreams come true.



Ruler:

Responsible, a role model, leader.
Wants to create a successful family and life, achieving control.



Introduction: from Primetime to Always-On Screen Time

Our screens—televisions, computers, tablets, gaming consoles, e-readers and mobile phones—have become more powerful than the sum of their parts. The content we engage with on our devices, whether our intent is social, productive or entertaining in nature, helps us make sense of our lives, our communities and even ourselves.

This shift presents both a challenge and an opportunity for marketers. While content was once generated to fit manufactured, marketer-created primetime spots and static advertising placements, consumers now

control their own flow of content—from day to night, and from screens large and small. We now believe User Experience has toppled content's reign as king: the ease with which consumers can use a device to enhance specific moments in his or her life is just as important as the content that's enabled through the screen.

Our Cross-Screen Engagement research quantifies four key pathways to multi-screen engagement and the underlying need-states driving each pathway, and identifies resulting implications for marketers.





The Paths to Engagement: Content Grazing, Spider- Webbing and Quantum

While understanding the unique relationships people have with each screen is important, consumers are no longer using screens in isolation. Multi-screening, defined as using more than one screen at a time—sequentially, simultaneously or separately—is increasingly the default mode of consuming content.

Screens merge, separate and rejoin in varying combinations. Identifying these patterns and the need-states that motivate them can help marketers simplify their approach to cross-screen consumer engagement.



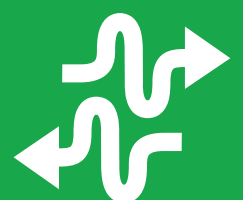
Content Grazing

The first and most common of the four pathways is called Content Grazing. Grazing occurs when consumers use two or more screens simultaneously to access separate or unrelated content. While consumers identify this behavior as “multi-tasking”, we found that it tends to be the most habit-forming pathway, and likely closer to distraction behavior. In fact, the high prevalence of entertainment activities suggests consumers are less concerned with getting things done and more focused on grabbing a quick moment of fun or escape.

The challenge for marketers trying to engage Content Grazing audiences lies in inserting themselves into this moment of distraction; marketers must either provide a quick snippet of content that satisfies this need or attempt to overcome short-attention spans and encourage deeper engagement.

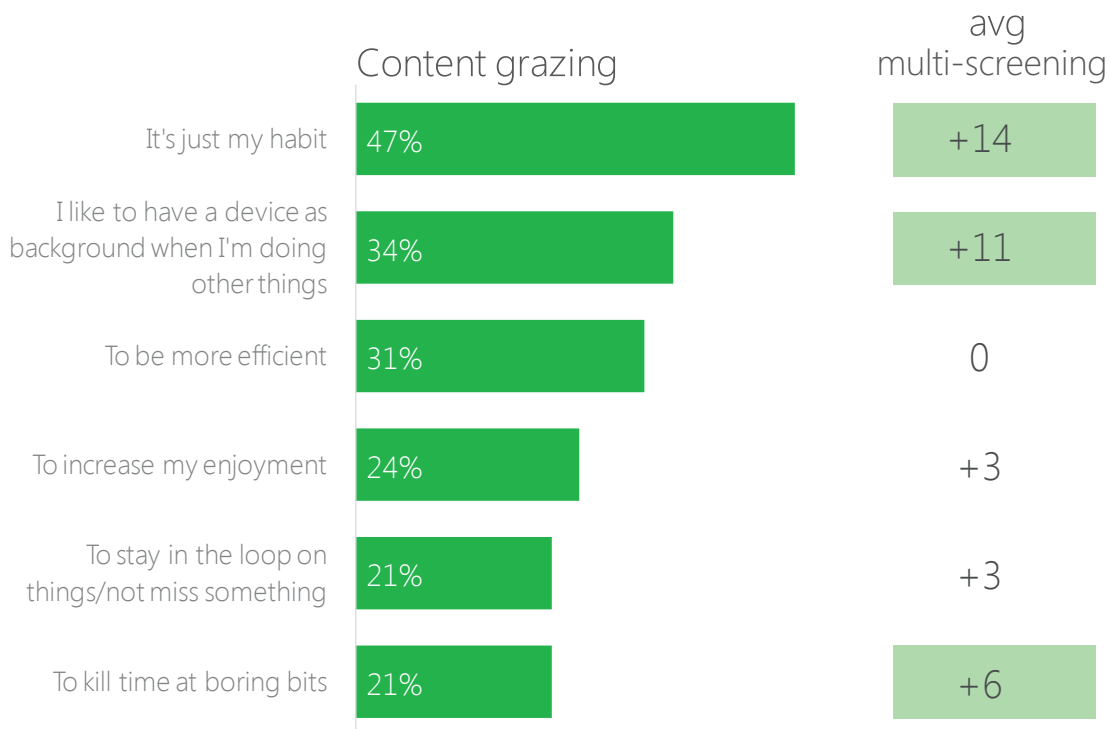
“When the ad breaks come on, I’ll check Facebook and my email, just to see what’s going on, and catch up on any news.”

Super Group, US



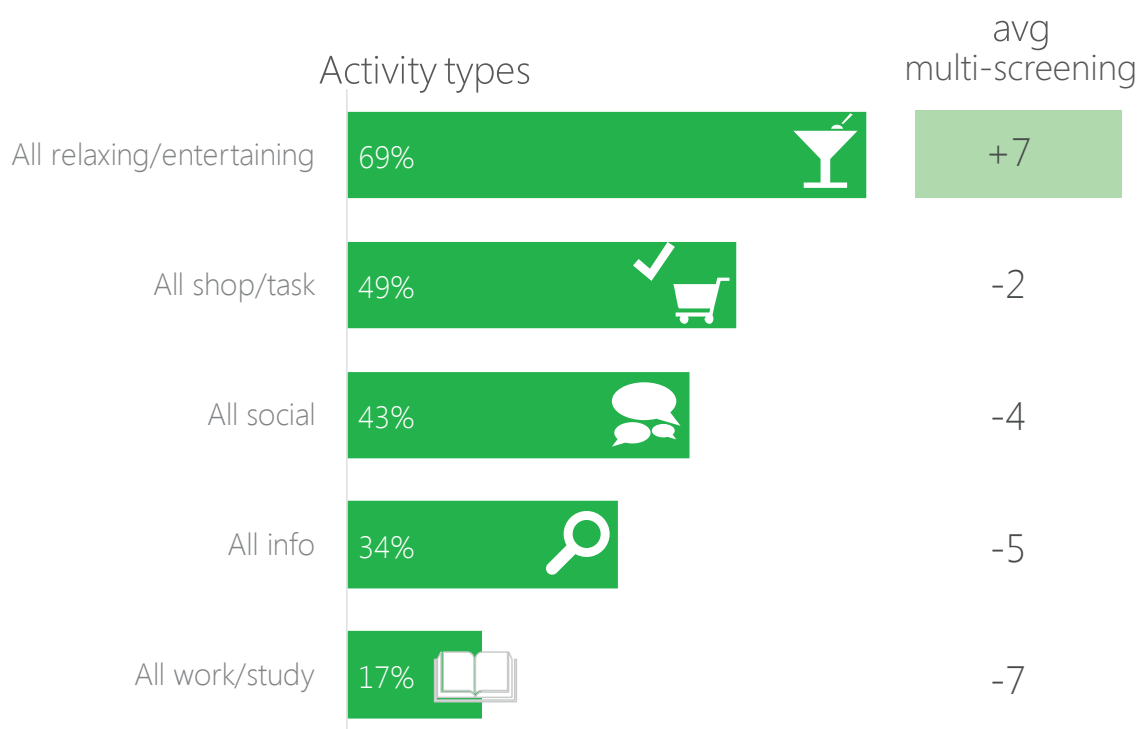
Habit, distraction and killing time are highest for Content Grazing

Habit is highest in Content Grazing scenarios compared to the other three pathways. While most consumers choose efficiency as a reason to graze, background noise and killing time are higher, suggesting that this habit is less about getting things done and more about overcoming boredom or tedium with quick bursts of distraction.



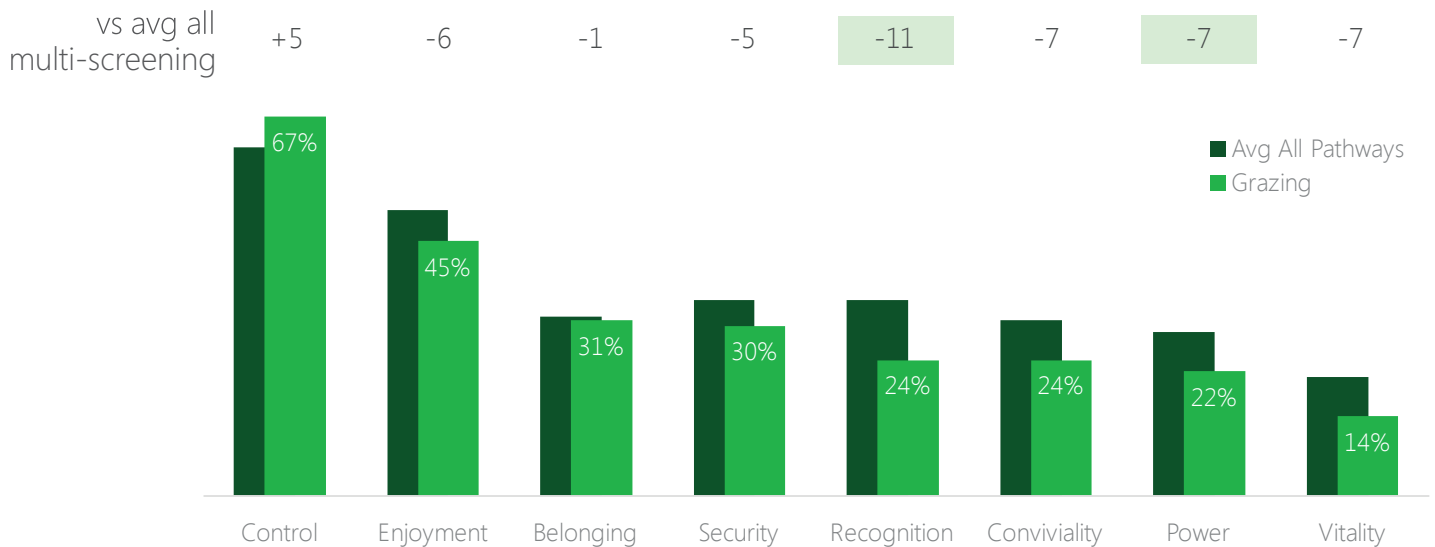
Relaxation and Entertainment lead Content Grazing Activities

Relaxation and entertainment activities are higher, suggesting that even separate content pathways offer consumers some form of entertainment and an enjoyable moment of escape.



Content Grazing helps consumers feel more in control

It's important to note that while control is the highest, feelings normally associated with staying organized and on top of things such as power and recognition under-index. 'Always on' doesn't necessarily mean consumers feel empowered; they likely prefer to turn on (and off) the faucet of ever-growing content on their own terms. Easy access to quick bursts of contextual content that consumers can pick up easily will help them feel in control of how, when and where they digest it.



"Why do I multiscreen? I always want to feel like I'm occupied and I'm doing things. I don't like doing one thing at one time—we're always constantly wanting to do things and feel engaged, occupy our minds..."

Anthony, Australia

"I don't get home from work until 7pm and have much to do and not much time to do it in before bed, so I do several things at once to save time."

Super User Group, US

What the screens bring to Content Grazing

Device	Role within Pathway
<div>TV & Streaming Console Content</div> 	<ul style="list-style-type: none">• Used at home and in the evening, often with others present• Likely shows normal TV content, often as background noise—it's often a secondary device to other activities on the partner screen• The TV's purest 'everyman' and 'jester' performance, simply providing some entertainment and little else
<div>Laptop</div> 	<ul style="list-style-type: none">• More likely to be chosen if alone—and sometimes in the morning, when more pragmatic and time-sensitive tasks are carried out• Brings control and efficiency—the TV is there to soften the task and ensure there is some enjoyment involved• A workhorse in this situation, often used for investigation and understanding as it relates to decision-making
<div>Mobile</div> 	<ul style="list-style-type: none">• More likely to be used if others are present• Distracts less from company and from the other device being used• One-to-one communication is the key task here, important emails or texts• Brings a social aspect to the activity; it's less of an intimate 'lover' and more of a 'caregiver' and 'everyman'• Can also help with information if required, however
<div>Tablet</div> 	<ul style="list-style-type: none">• Slightly more likely than the phone to be used when alone, partly because it takes a bit more attention away from the moment• Often used for involved activities such as gaming or video viewing, distracting from what's on the other screen• A demanding 'ruler', but can also deepen the enjoyment of the entire situation—tablet + TV is often more enjoyable than TV alone, even among separate multi-screening scenarios



Investigative Spider-Webbing

Investigative Spider-Webbing is a simultaneous journey where consumers view related content on two or more devices at the same time. This is a curiosity-led moment of deep engagement, where consumers seek information or content that complements and amplifies the primary screen experience.

Consumers may face frustrations if they can't find compelling enough supplementary information and subsequently abandon even the original content or activity. There's an opportunity for marketers to distribute content thoughtfully, dispersing it along exploratory threads to encourage deeper exploration and to satisfy the consumers' need to search and find more.

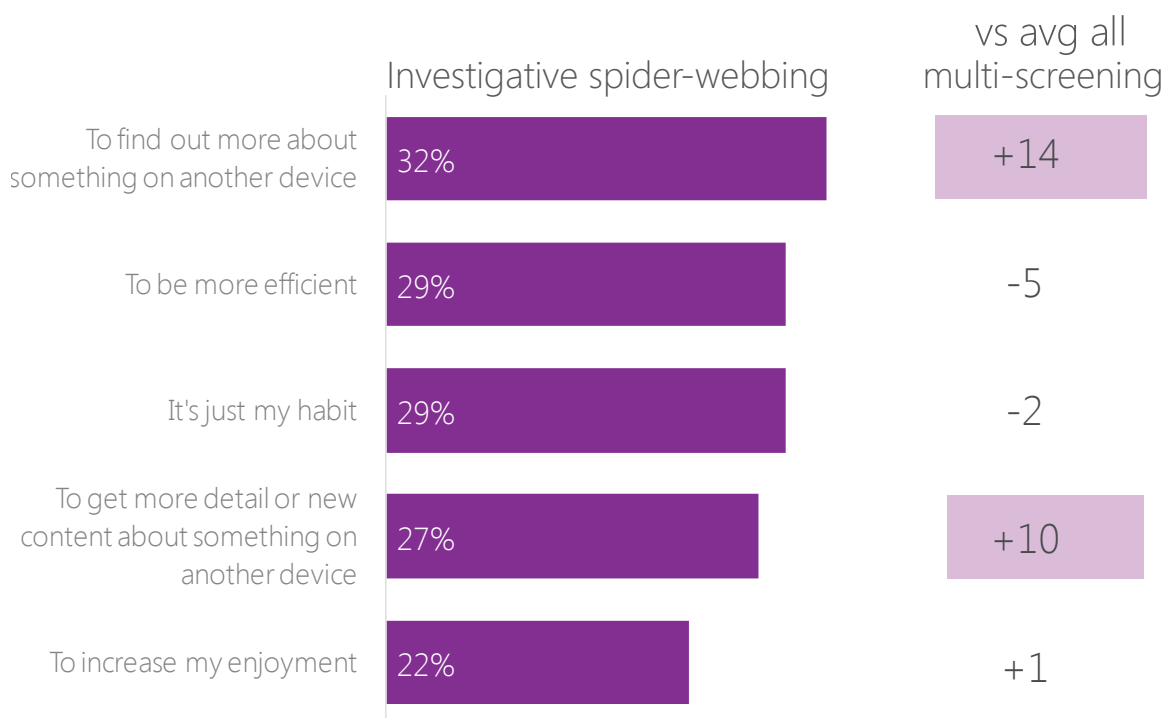
"I'll be watching a film and IMDB'ing, check stuff about the film, I'll think, where have I seen this guy before then go on an epic journey to find him!"

Super User Group, UK



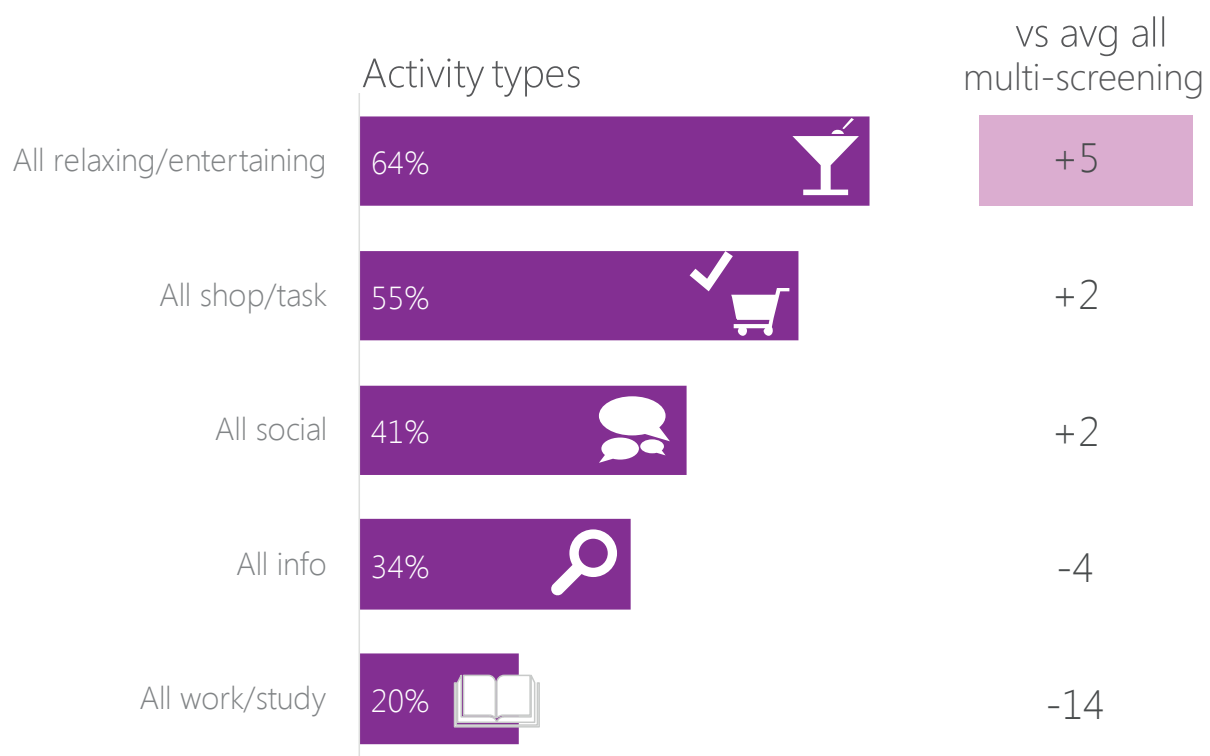
A desire to learn more drives Investigative Spider-Webbing

Investigative Spider-Webbing fulfills a need for depth: consumers simply want more, and they turn to another device to find it.



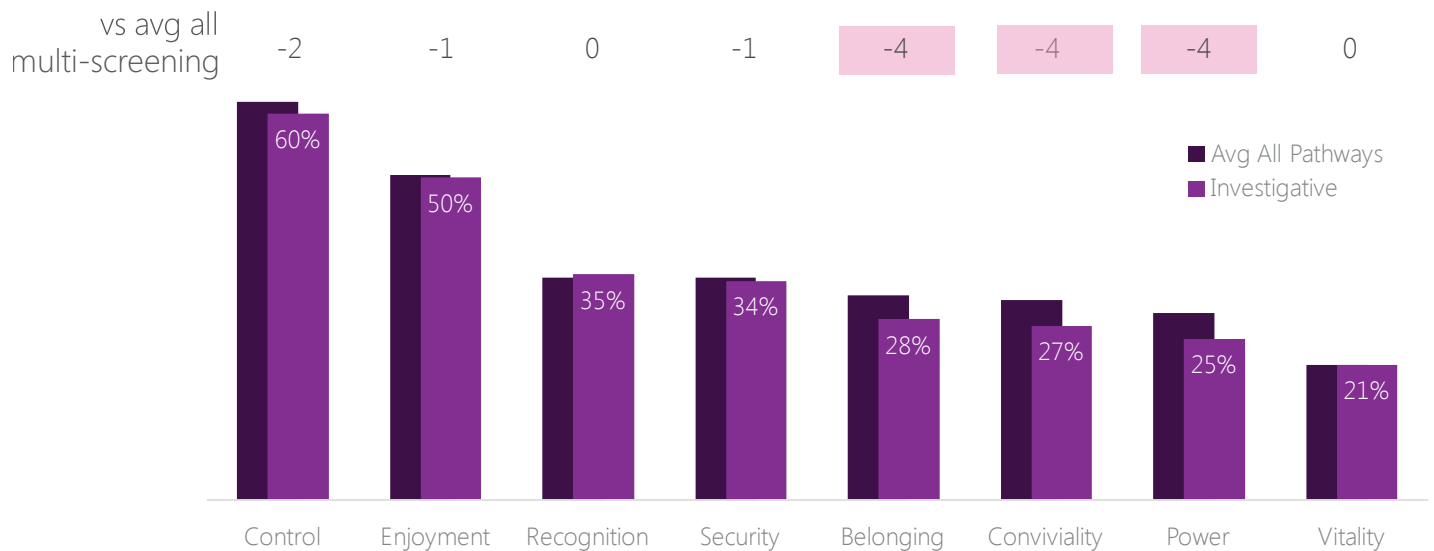
Investigative Spider-Webbing is ultimately about entertainment

Compared to other pathways, Investigative Spider-Webbing fulfills entertainment and relaxation needs, but also enables a possible entre into shopping or other transactional activities.



Investigative Spider-Webbing indexes lower on social motivations

It's clear that Investigative Spider-Webbing is a much more introverted, information-seeking behavior; belonging and conviviality are significantly lower compared to other multi-screening paths. This is an individual pathway, where marketers can leverage consumers' innate sense of curiosity to enhance an experience with rich branded content.



"I use my tablet to make what I'm watching on TV more interesting. I'll watch football on TV while getting information on the teams and players on my tablet."

In-home, UK

"Now I don't want to watch TV by itself; there is just a lot more that entertains me. I find that there is time when I am resting and relaxing, to find out more, to do it all—because it interests me so much."

Super User Group, US

What the screens bring to Investigative Spider-Webbing

Device	Role within Pathway
<p>TV & Streaming Console Content</p> 	<ul style="list-style-type: none">• Usually the spark for further action• Typically at home in the evening and when others are present• Brings the fun and enjoyment to the activity—but if anything, the content on the primary screen loses some of its power as attention switches to the other device• Can introduce new ideas, but more detailed or more personalized needs are met by the second device
<p>Laptop</p> 	<ul style="list-style-type: none">• Provides the control to the TV's enjoyment• Knowledgeable, 'Sage'-like personality comes through• Satisfies information-seeking, comprehension and understanding needs, making it a strong partner to the TV
<p>Mobile</p> 	<ul style="list-style-type: none">• More likely used if others are present as a more 'polite' device, though the overall situation (at home, in the evening) is similar to the laptop• When used with other devices, it becomes less of a knowledge-seeking device than when it's alone
<p>Tablet</p> 	<ul style="list-style-type: none">• Even more likely to be used at home, in the evening and with others present• Adds to the enjoyment of the overall activity, more so than the laptop or the smartphone• Provides both key aspects of the other devices—the softer, connecting side and the deeper knowledge-seeking side• And as the 'Explorer' archetype, it's ideal for finding more information to help with decisions



Social Spider-Webbing

Social Spider-Webbing is the mirror image of Investigative Spider-Webbing; it's extroverted, and focused on sharing and connecting. Content is a catalyst for this pathway; it provides the spark that provokes consumers to connect to like-minded communities and add to the conversation. One in five consumers engage in social spider-webbing pathways while watching live events on TV.

While brands still face challenges integrating with socially-generated content, the opportunity to target audiences where they are likely to interact deeply and emotionally within communities is compelling.

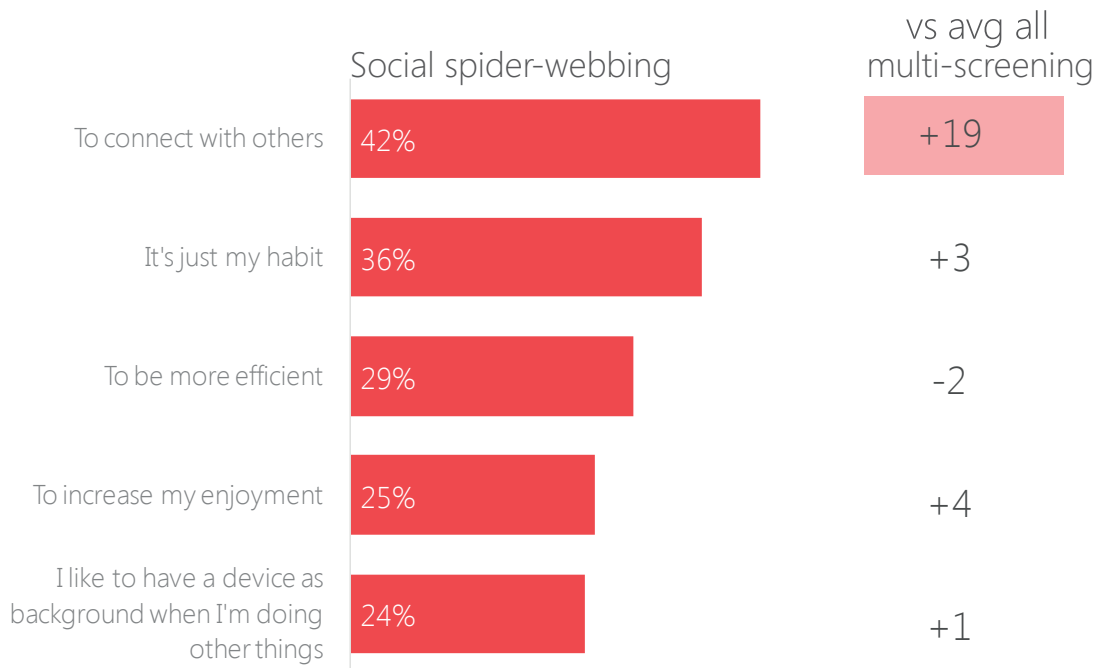
"You're in touch with a lot more stuff—like if I'm watching TV and I want to tell someone about it: I can contact anyone around the world at any time."

Super User Group, US



Social Spider-Webbing is focused on connection

Consumers engage in Social Spider-Webbing to connect with others. Solitary experiences are transformed into social occasions.

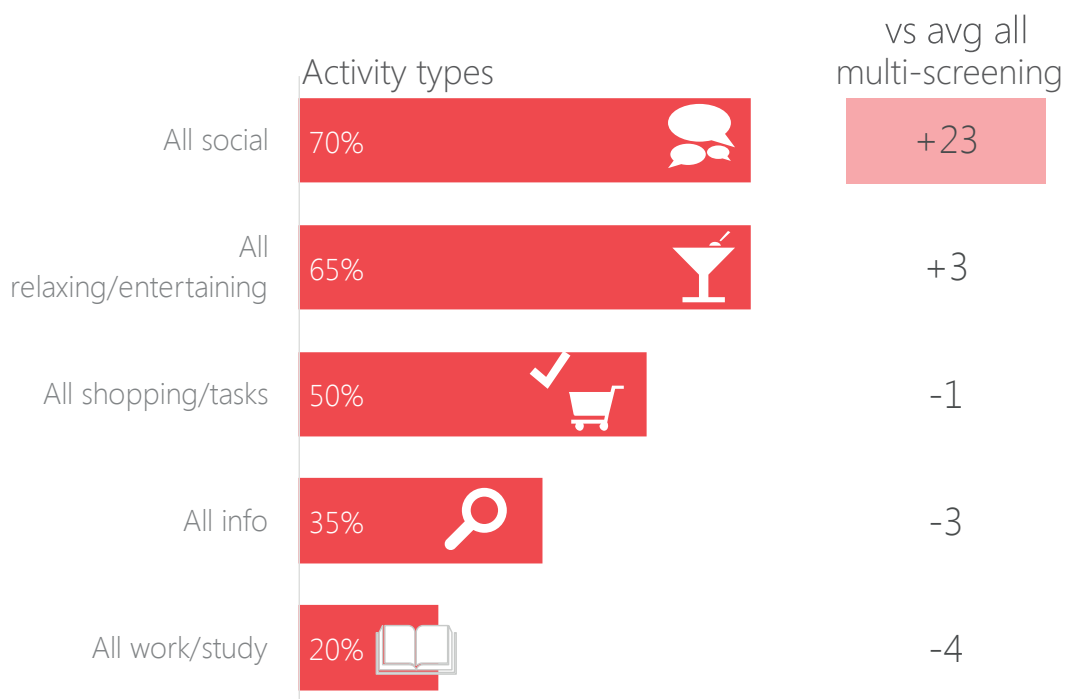


TV is often the catalyst

While television acts as the catalyst, tablets and mobile phones draw a significant amount of attention.

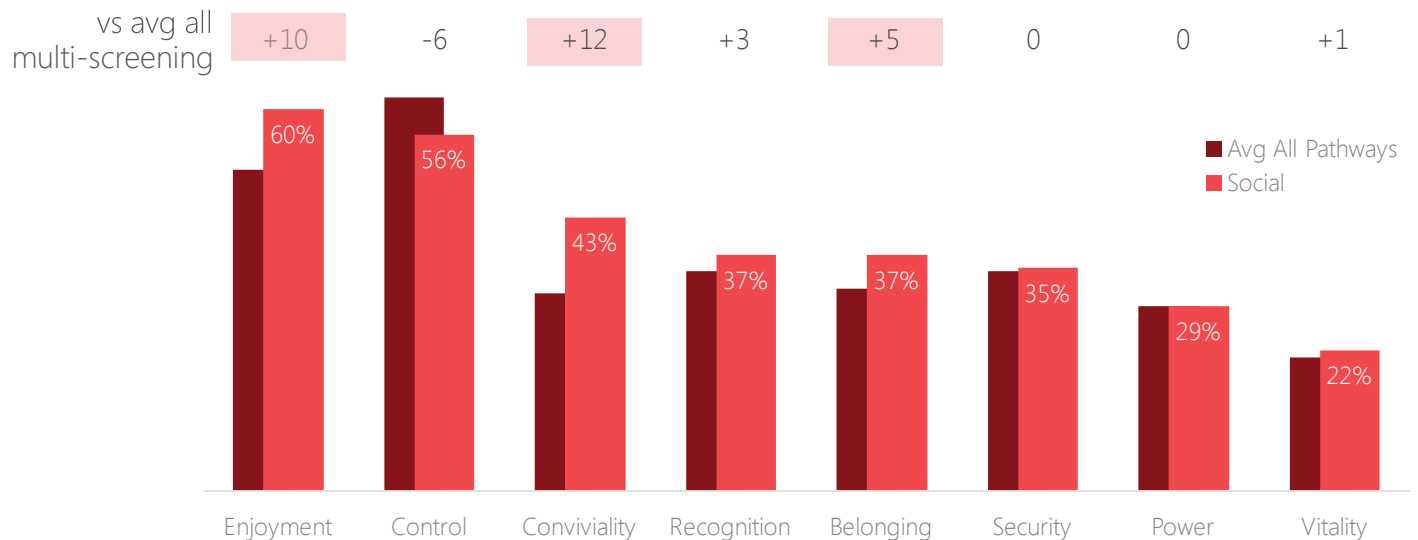
Social Spider-Webbing is first and foremost social, but also entertaining and relaxing

True to its name, Social Spider-Webbing contains lifts for all social activities, including sharing and connecting over social networks, emailing, texting and reading ratings and reviews.



Conviviality pops in Social Spider-Webbing behaviors

Social Spider-Webbing is a shared experience; enjoyment, conviviality and a sense of belonging are all important. This is a natural place for marketers to connect consumers to like-minded communities and provide a sense of belonging through reviews, localization and discussion forums.




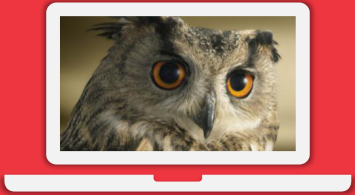


"No matter what I am doing, I'm always talking to someone. We've evolved to rely on our devices so much: I Facetime with my kids, get messages from friends in other countries... everything."

Michael, 30, Canada

"I'll watch X-Factor on the TV, text with my boyfriend about it on my phone and see what my friends are writing about it on Facebook."

Super User Group, Brazil

What the screens bring to Social Spider-Webbing

Device	Role within Pathway
<p>TV & Streaming Console Content</p> 	<ul style="list-style-type: none">• Evening-based, at home and with others present in the room• Live events make up 1/5 of these situations• More than in any other situation, the TV is the 'hero', providing the content that sparks conversation• Can also introduce new ideas, which are subsequently explored with friends
<p>Laptop</p> 	<ul style="list-style-type: none">• More likely to be used when alone• More information-focused than the phone; it's less about one-to-one communication and more about helping people explore TV content with the assistance of others• Like the phone, 'lover' characteristics can be deepened, but it also delivers the knowledgeable 'sage' aspect and helps with investigation activities
<p>Mobile</p> 	<ul style="list-style-type: none">• Consumers turn to their mobile when others are present; the behavior occasionally creeps into the morning, as well as in the evening• It's more likely to be used for one-to-one (or few) communication, though wider social networks also plays a part• It deepens the enjoyment of the situation and heavily calls on its 'lover' and 'caregiver' aspects
<p>Tablet</p> 	<ul style="list-style-type: none">• Halfway between the laptop and the phone—it's a bit more likely to be used when others are present than the laptop, but not as much as the phone• Adds more fun, closer connections and more engagement than either of the other devices, likely because it's a tactile, immersive screen experience• Not as serious as the laptop if more information for key decisions is needed



Quantum

In quantum journeys, consumers leap over time, space and screen to achieve a goal. They start an activity on one screen and continue it on another. This pathway is sequential and distinctly intent-based; as a result, ease and productivity are paramount. Efficiency is the dominant reason consumers take quantum pathways, with activities such as working, shopping and completing tasks coming to the forefront. This is also the pathway consumers are most likely to start at work or on-the-go.

While consumers expect consistent, cohesive experiences across screens, technology is often not seamless. Quantum paths can be chaotic and disjointed with clunky workarounds. Marketers should seek out partners who can help seed ideas on one screen for further exploration on another, and then encourage consumers to move to the screen that best suits the marketer's goal.

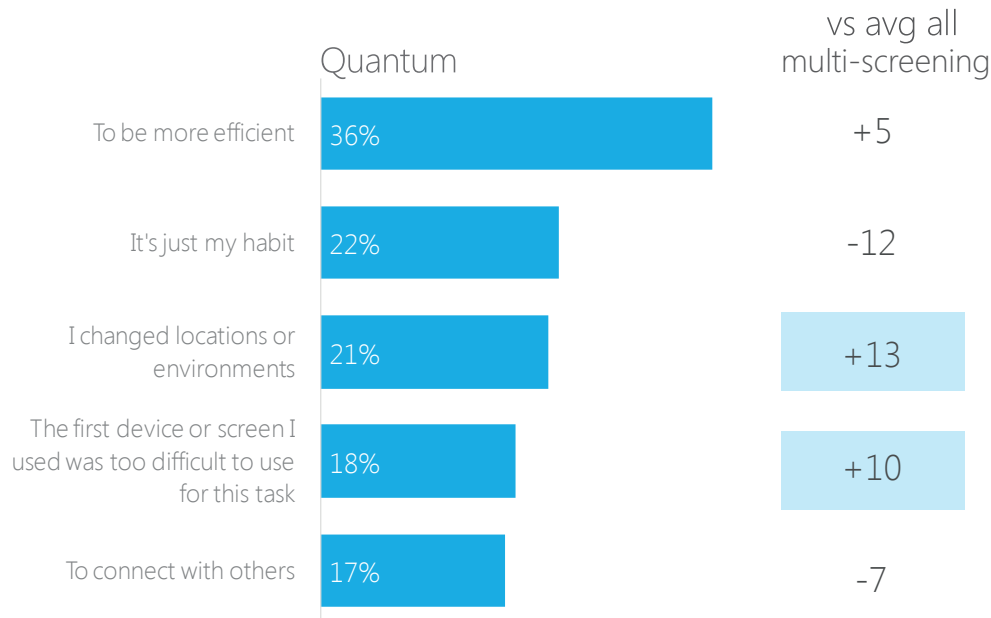
“With more than one screen, I can get information much faster—it’s faster to look it up on another screen than to open and change tabs.”

Super User Group, Brazil



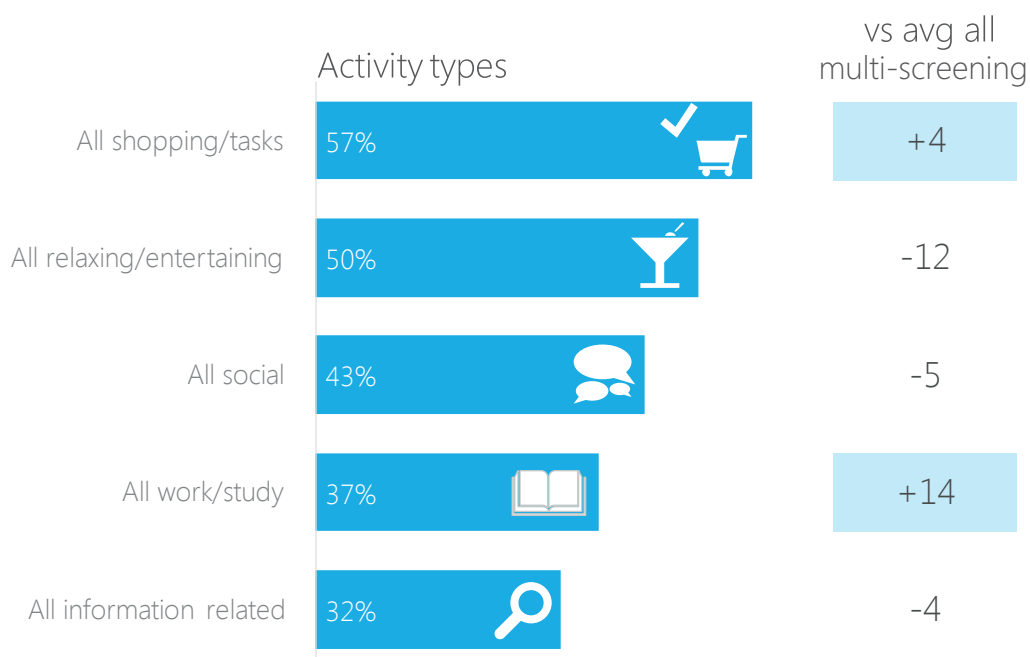
Quantum paths are about efficiency: changing screens due to location or ease of use

Quantum pathways are perhaps the most futuristic of all, signaling the ability to complete tasks anywhere and on any screen. Consumers move to a second screen in this scenario because they're on the move, they need a better device or they want to do something with greater efficiency.



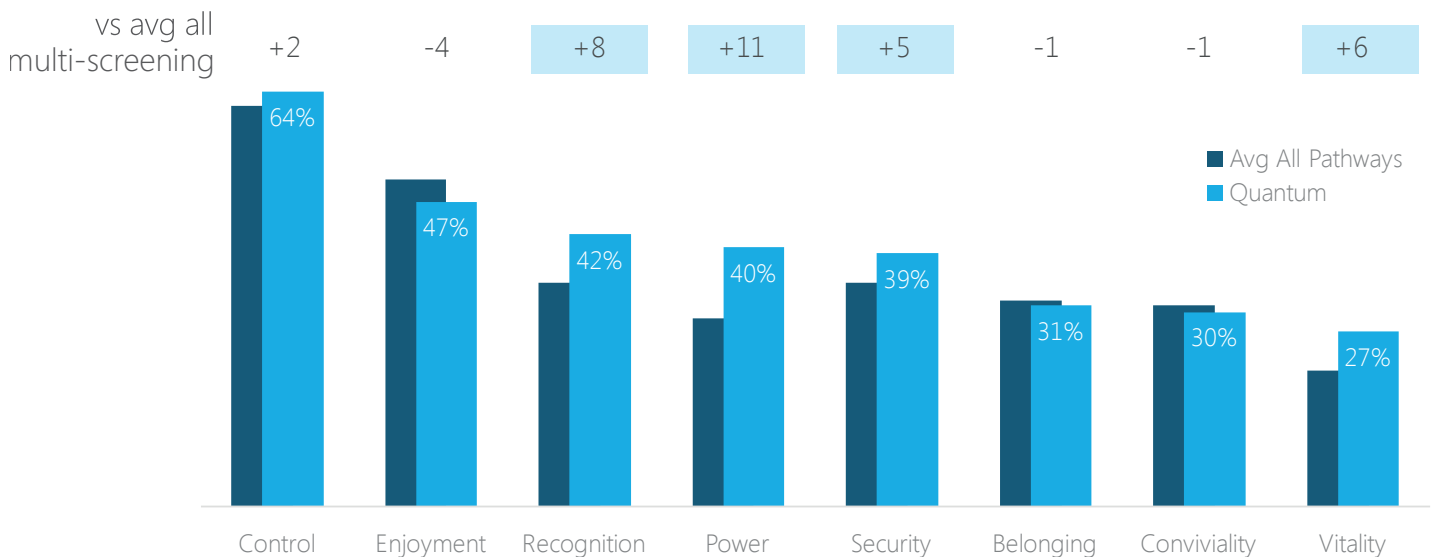
Quantum activities are task-based and pragmatic

Within this pathway, consumers are likely to conduct work-related or task and shopping-related activities. It's by far the most pragmatic of the four pathways.



Quantum paths fulfill the need for control, but also power and recognition

Quantum pathways suggest a strong need for consumers to feel on top of things. Power, recognition, security and vitality are higher compared to the other pathways and indicate a desire for consumers to feel organized, get things done—and know how to use technology effectively to help them do it. Marketers should seek out opportunities to help consumers feel more efficient through seamless cross-screen experiences, access to cloud storage, personalization and rewards for using digital channels.



"I see stuff when I'm out, like a poster for a concert that I'm interested in. So I'll take a photo of it on my phone and then later at home I'll look into it properly on my laptop."

Peter, US

"The main reason I multi-screen is if I start looking at something on the train or at work, like I started my Tesco shop on the way home on the train, now finally finishing it off on Sunday on the laptop."

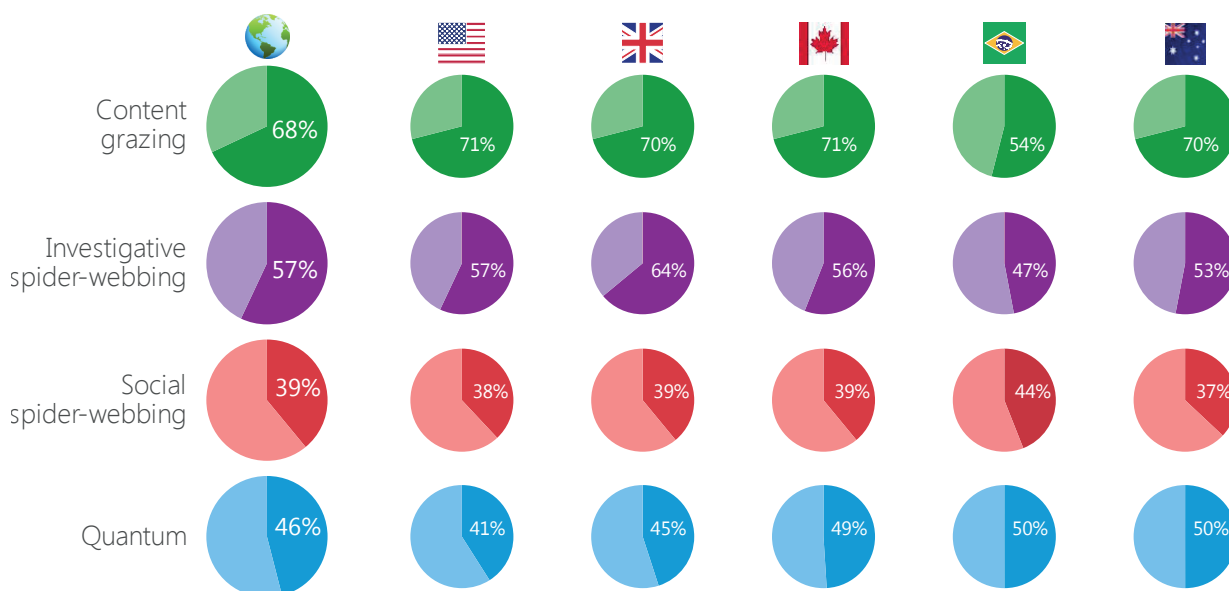
Beckie, US

What the screens bring to Quantum Pathways

Device	Role within Pathway
<p>TV & Streaming Console Content</p> 	<ul style="list-style-type: none">• Home and evening based, when others are present• Provides content that is either the spark for further action or the result of 'digital note-taking'• Inclusive, friendly side comes through strongly• Can meet vital discovery and enrichment needs when it comes to decision-making activities
<p>Laptop</p> 	<ul style="list-style-type: none">• Mainly used at home and in the evening• Used for information-gathering and social, but also for more involved tasks, such as video viewing and gaming• Adds greater control to the Quantum activities• Brings its 'ruler' and 'caregiver' aspects to the fore• Key to decision-making, if relevant, particularly info-seeking and understanding
<p>Mobile</p> 	<p>The phone plays a key role in Quantum activities</p> <ul style="list-style-type: none">• Can be used throughout the day, in home and away, to initiate and complete tasks• Usually used for communication or to dig deeper into something that has caught the consumer's eye• Brings the social, connected aspect to Quantum activities, often being the 'hero' or 'ruler' of the pathway• Can be used for decision-making needs, particularly information gathering
<p>Tablet</p> 	<ul style="list-style-type: none">• Mainly used at home, the tablet provides information and enrichment in a more pleasure-seeking state-of-mind• Discovery tool

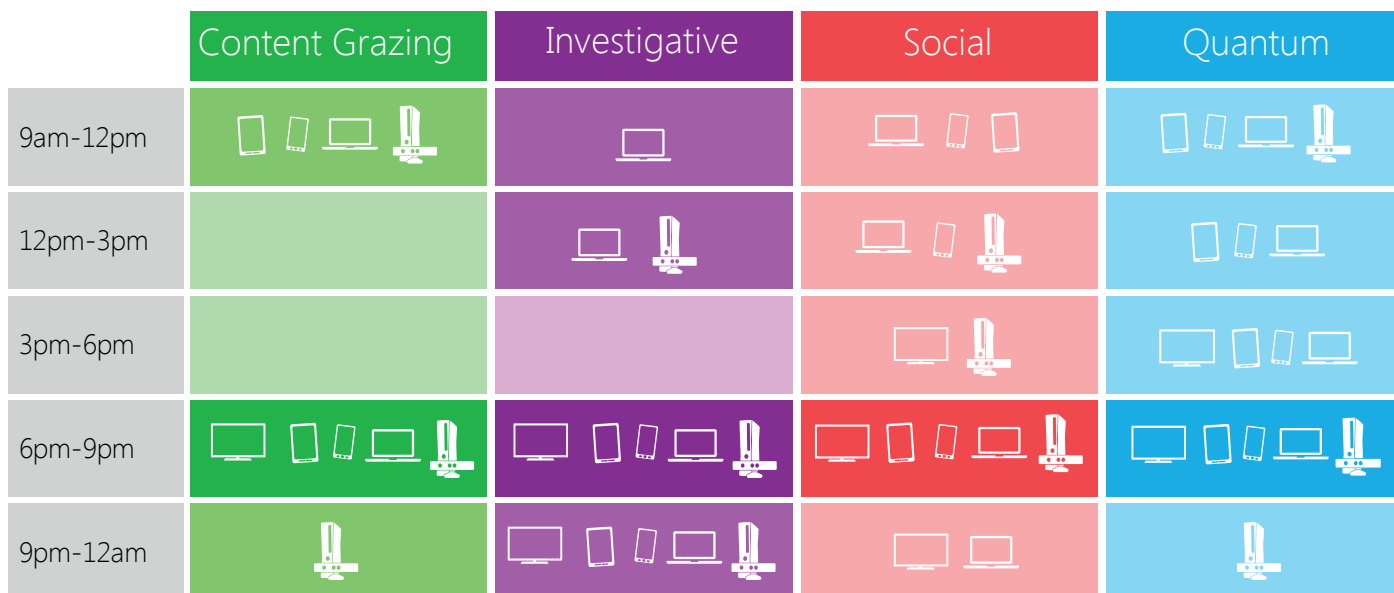
Incidence & Day-Parting

Perhaps not surprisingly, Content Grazing is the most common multi-screen pathway; consumers have grown accustomed to engaging with a constant stream of content. It's simply modern life. Investigative Spider-Webbing is the second most common, suggesting that consumers see significant value in adding a second screen to amplify what was once a single-screen experience. Conviviality-led Social Spider-Webbing is highest in hyper-communicative Brazil, but we expect it to increase even more across markets as social platforms expand to wider consumer audiences. And finally, 46% of consumers take Quantum Pathways, intent-led and often pragmatic in nature.



Pathway Day-Parts

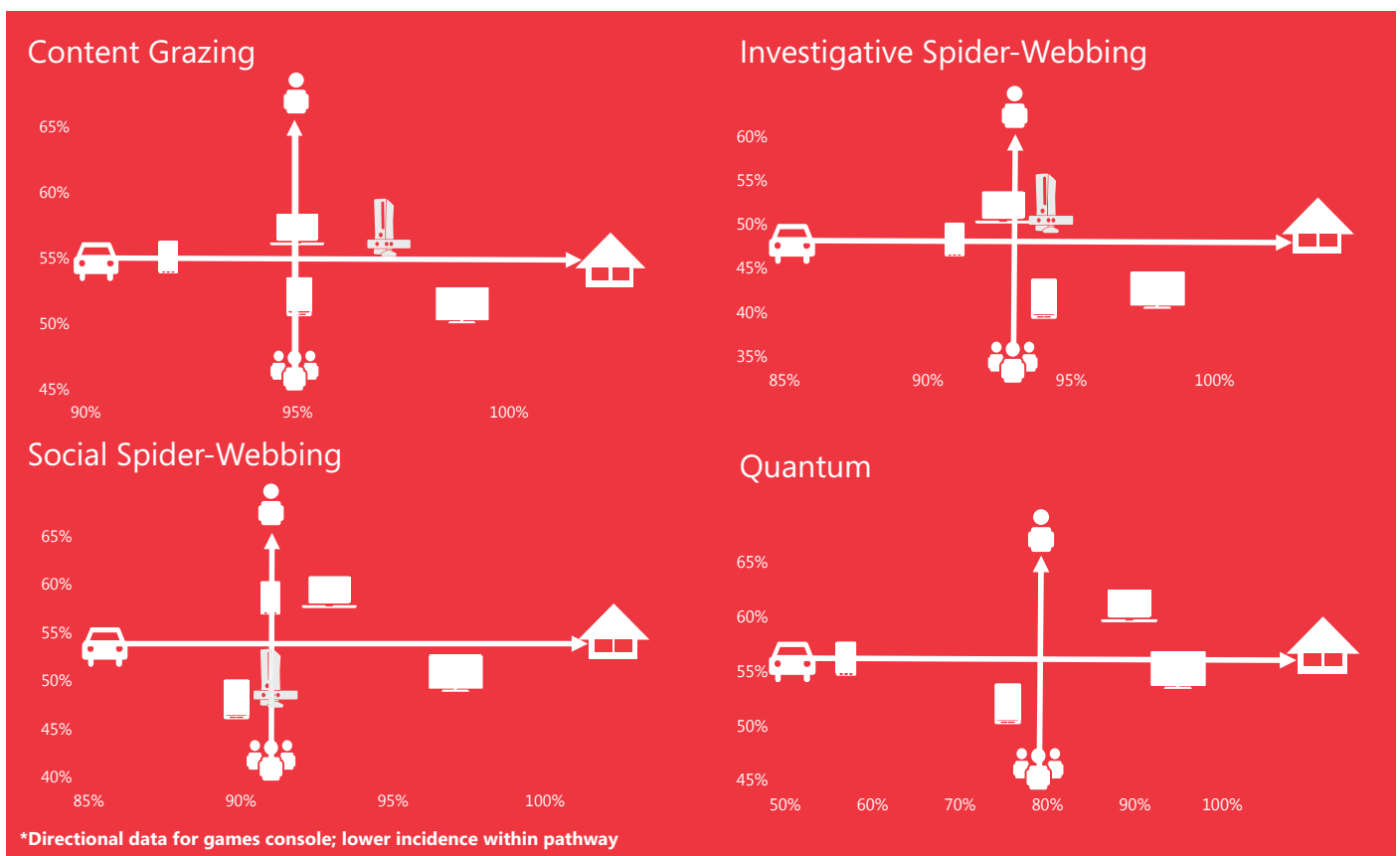
In the morning, consumers tend to be more task focused, orienting themselves to their day. Quantum Pathways, some Social Spider-Webbing and Content Grazing are prevalent. Content Grazing is noticeably absent in the afternoon, suggesting that consumers are more focused on a single task and likely absorbed at work or at home. In the evening hours, multi-tasking kicks into high gear, with Investigative Spider-Webbing continuing into the later hours.





From work to home: Mobile travels, tablets connect

While Spider-Webbing activities occur mostly in the home, Quantum pathways are rife with opportunity to reach consumers on-the-go. The mobile phone is most likely to be the bridge from at-work and on-the-go activities to the home. Tablets, gaming consoles and televisions are the devices most likely used with more than one person, while mobile phones, and for the most part, computers, remain firmly in the grasp of individual hands.



Pathway Summary

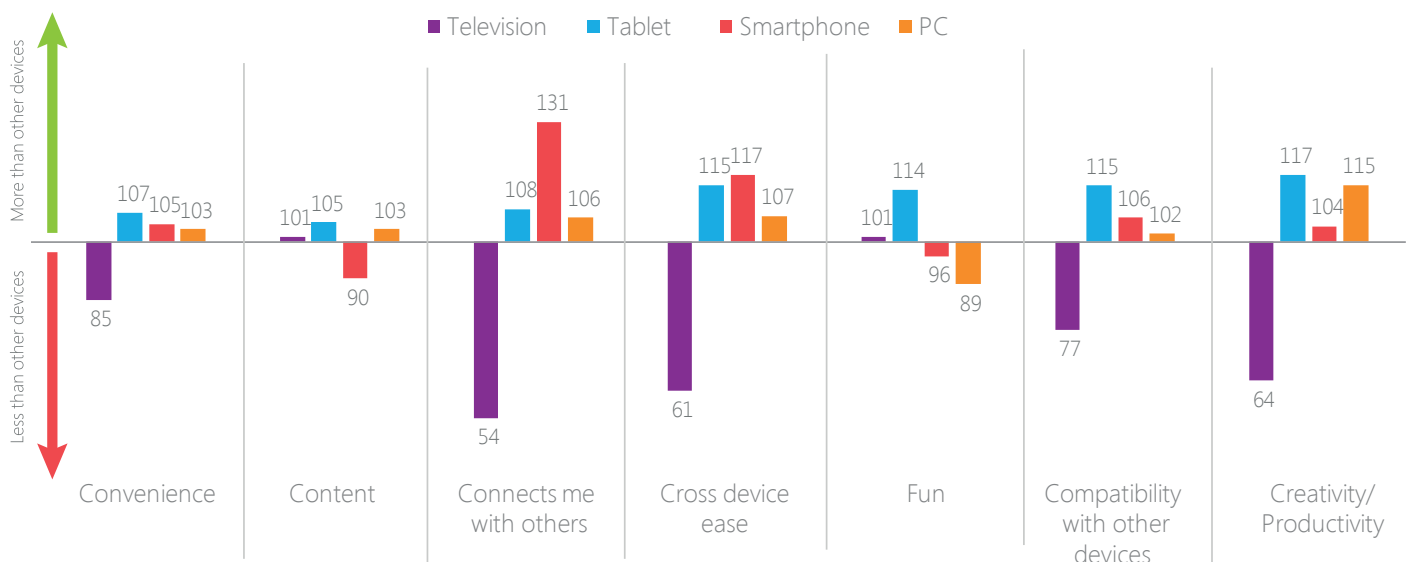
	 <p>Content Grazing</p>	 <p>Investigative Spider-Webbing</p>	 <p>Social Spider-Webbing</p>	 <p>Quantum</p>
Dominant activity	Relaxation/entertainment	Relaxation/entertainment, alongside shopping & tasks	Social/Enjoyment	Shopping/Tasks
Most common reason for multi-screening	Habit, distraction	Seeking detail & design	Connect with others	Efficiency, location change, better user experience
Prime day-parts	Morning & Evening	Evening & Night	Morning, Noon & Evening	Morning, Afternoon & Evening
Work, On-the-go or Home	Work, On-the-go, Home	Home	Home	Work & On-the-go
Dominant need-states (by index)	Control: "I'm in control of my moment—whether it's a task or a quick bit of fun"	Recognition, vitality, enjoyment: "I want to satisfy my curiosity; going deep on a topic is an enjoyable way to spend my down time"	Enjoyment, conviviality, belonging: "Adding a social element makes me feel like I'm part of a community"	Power, recognition, vitality, security: "I'm on top of things; and it feels good to use tech to get things done well"



The Screens: The Everyman, The Jester, The Sage, The Explorer, The Dreamer and The Lover

In 2010, we partnered with BBDO and Ipsos OTX on a study called Meet the Screens, which identifies Jungian archetypes as a way of uncovering the dominant relationship consumers have with each device. Our new study deepens our understanding of the archetypes through multiple points of consumer interaction, including qualitative interviews, ethnographies and quantitative data to validate the ways consumers engage with each screen.

Index of Screens according to their primary use attributes





Television: The Everyman



Television, our most established screen, has fully grown into “The Everyman”; it’s the most popular device for multi-screening behavior. TV delivers passive entertainment, enjoyment, familiarity and comfort. It’s best positioned to provide emotional brand experiences that are intuitive and easy to understand, but more

and more consumers are using a second device while watching television: seven out of 10 consumers use a second device while watching TV. Marketers will likely find deeper engagement when driving consumers from the TV to alternate screens, such as the tablet.

“Something about a giant TV makes you feel less lonely. I’m a student living alone, and having the TV on as background noise as I’m folding laundry or doing other menial tasks makes me feel less like a crazy cat lady.”

Nicolette, US



Gaming console: The Jester



Gaming consoles immerse consumers in another world through beautifully rendered graphics, compelling games, social interaction and streaming video. It's also a highly social device, with 60% of consumers globally associating it with a sense of conviviality.

Marketers should invite interactivity and a sense of fun on this medium, tapping into consumers' need for competition, achievement and escape.

"I'm usually in a good mood and find myself quite immersed. It's the best for relaxing my mind from other frustrations even if it might only be for a temporary moment."

Markus, Canada



Laptop: The Sage



The laptop and desktop informs, empowers and teaches. Productivity is key and usually seamless. Here, consumers want a powerhouse environment that deepens their knowledge and helps them be productive. It's about control, but consumers also associate it with enjoyment; after all, people

like learning, investigating and showing off what they know. Brands should adjust to this mindset by helping consumers create, get work done, stay organized, shop, compare and make purchases online.

"The PC is more about work, information and education.
It's the best for detailed information, research and large content."

Ben, Australia



Tablet: The Explorer



The tablet is still coming into its own, but as “The Explorer”, it travels light. Consumers are reluctant to download as many apps as they have on their mobile phones, likely because they want to keep the experience clean and streamlined. They tend not to want too much baggage along the way. While tablets facilitate discovery and investigation,

they also have the potential to be the go-to device at home; they offer consumers more engaging experiences, even when conducting routine tasks such as search and email. Marketers should approach advertising on the tablet by inviting consumers into compelling, multi-dimensional experiences through rich media and video.

“There’s a reason why it is called a tablet. It’s a blank slate. There is an ocean of things you want to learn about.”

Michael, Canada



E-reader: The Dreamer



The e-reader is “The Dreamer”, a place of purity and a sanctuary from busy lives. And while e-readers are capable of web browsing and other common online activities, they are primarily single-use devices; consumers use them to escape deeply into a book, newspaper or magazine. Content for this platform must be thoughtful and non-intrusive.

“It just does one basic function but it does it extremely well.”

Super User Group, US



Mobile phone: The Lover



As the most personal device, the mobile phone evokes intimacy, commitment and trust. But there are signs of strain in the relationship, and many consumers are starting to detect 'the lover's shadow'. The 'ruler' archetype begins to emerge; mobile can have a dark side, which can nag at consumers and demand unwanted attention.

The two sides emphasize the need for mobile content to strike a balance—"grow with me, help me, but give me space." It's imperative that marketers avoid intrusive commercial messages here, and instead, deliver relevance and value at a personal level.

"My phone is part of me. It has everything on it and is always by my side. I'm happy, safe, complete when I have my phone... apart from when it runs out of battery."

Karen, Brazil

The Markets: Australia, Brazil, Canada, the UK and the US

Our qualitative interviews yielded compelling nuances among markets, yet we found surprising consistency in the way consumers use screens—both individually and in combination.

Device Ownership: Cross-Screen Engagement study

Device	Total	US	UK	AUS	CAN	BRZ
Television	90%	90%	91%	88%	90%	90%
Desktop Computer	69%	72%	64%	65%	74%	72%
Laptop Computer	81%	83%	85%	82%	83%	67%
Tablet	50%	52%	49%	48%	54%	44%
Smartphone	77%	70%	83%	81%	77%	73%
eReader	30%	34%	41%	20%	33%	11%
Gaming Console	64%	66%	67%	58%	73%	56%

Sydney, Australia

In our qualitative interviews, most Australians indicate that technology is slightly less central to daily life than consumers in the US and UK. They tend to focus more on quality of life and less on the frenetic nature of staying connected 24 hours a day.

São Paulo, Brazil

In Brazil, owning the latest devices and technology is highly desirable, yet still somewhat aspirational. While technology is lagging slightly behind due to unreliable broadband and 3G availability, consumer enthusiasm and creativity abounds: it's not unusual for consumers to have more than one SIM card or phone, for example.

Toronto, Canada

Compared to their North American neighbor to the South, Canadians have a slightly more positive view of technology. While it plays a significant role in productivity, it's primarily viewed as a pleasant and helpful set of tools, rather than as a source of anxiety. Widespread free wireless in Toronto and strong broadband provides easy access to content.

London, UK

In the UK, technology is essential not just for enjoying life, but also for simple everyday survival within a busy, consumer-driven economy. UK consumers have high standards for content; the market tends to be on the leading edge of tech and app development. Broadband and 3G is widely available and reliable, while the high penetration of smartphone and tablets provide a content-ravid audience for marketers.

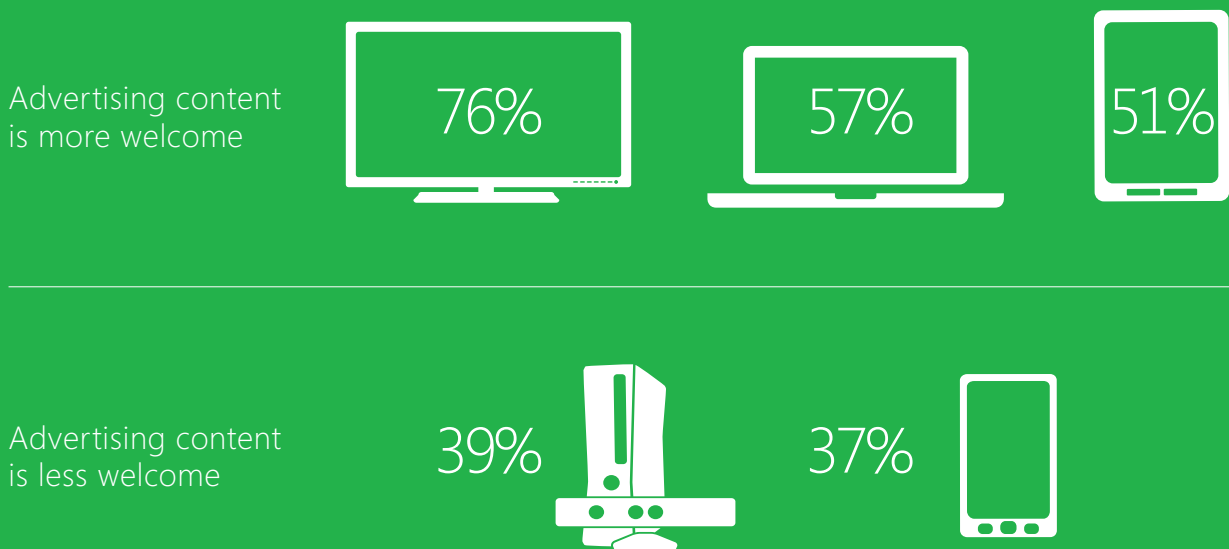
Chicago, US

In the US, technology plays a critical role in productivity: American workers typically seek a seamless existence between technology at work and home that helps them organize their lives and get things done. It's important to note that the US is also a saturated media environment; consumers typically view more advertising messages than they can possibly absorb in a typical day and this is reflected in somewhat negative views of technology throughout our interviews.

Consumer Reactions to Multi-screen Advertising

Multi-screening consumers are open to advertising, yet it's clear that this openness varies depending on how and where the content is delivered. Consumers have a lower tolerance for advertising on mobile phones, where the device demands more intimate and personal content. Similarly, consumers tend to be sensitive to interruptive advertising on gaming consoles.

Consumers are most open to advertising on the TV, computer and tablet



74% of consumers agree that "Advertising can be helpful in telling me about new products or brands that might interest me."

87% of consumers agree that "It's great that I can check out products or brands that interest me whenever or wherever I see them."

Marketer Implications

In order to succeed in an 'always-on' world, marketers need to take a multi-layered approach to content distribution, one that enables portable, personal and interactive engagement across devices. Understanding consumer needs and motivations throughout the pathways and partnering with the right digital enabler is essential in order to meet consumers where and when it's most relevant.

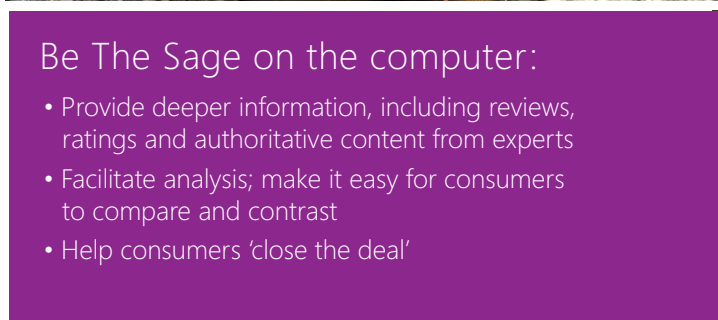
Be The Everyman on TV:

- Tell emotional stories
- Keep your message accessible
- Build your brand



Be The Jester on the console:

- Keep it interactive
- Appeal to the consumers' sense of fun
- Provide a sense of competition and reward achievement



Be The Sage on the computer:

- Provide deeper information, including reviews, ratings and authoritative content from experts
- Facilitate analysis; make it easy for consumers to compare and contrast
- Help consumers 'close the deal'



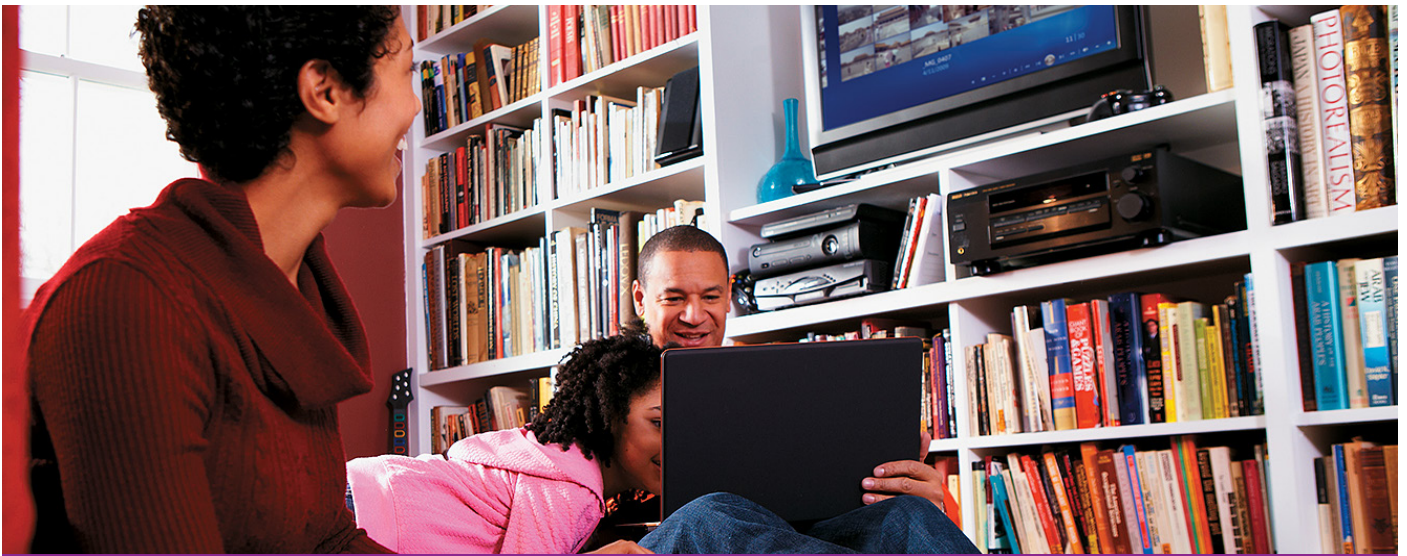
Be The Explorer on the tablet:

- Take consumers to new places; entice them and appeal to their sense of curiosity
- Tell stories using visual, evocative tools, such as rich media and video
- Give consumers control of the experience... but provide curation

Be The Lover on the mobile:

- Support consumers; make sure you're adding value, not interrupting them
- Give them ideas; this is an ideal place to plant a seed for later exploration
- Facilitate personal connection and foster a feeling of belonging





Play to Content Grazing:

- Keep it bite-sized, fun, quick and efficient
- Understand the measurement implications: consumers may not want to hang around, so dwell time and other engagement metrics likely won't be effective here
- Quick bites of content via Xbox and Bing apps in Windows 8 provide fast, fun engagement for short attention spans. And in fact, scores for ad recall for the Windows 8 Ads in Apps pilot program outperform the benchmark for microsite evaluation at a 92% rate of recall.

Windows 8 Ads in Apps PR Pilot Research, September 2012.



Play to Investigative Spider-Webbing:

- Pique curiosity and provide an appetite for supplemental information
- Curate content and leave a compelling trail for consumers to explore
- Windows 8 is the ultimate spider-webbing enabler. Spark a Spider-Webbing pathway by connecting an Xbox streaming experience to tablet's exploration mode using SmartGlass, which enables devices to work together to show rich interactive activities and new content



Play to Social Spider-Webbing:

- Facilitate social interaction through content that sparks conversation
- Weave your own social threads for consumers to explore; keep it valuable and interactive
- Skype is a powerhouse Social Spider-Webbing tool. Utilize Skype's broad social platforms in conversational spaces. Consider hosting branded Skype chat sessions during popular live events



Play to Quantum Pathways:

- Leverage connected devices to move the consumer to the best screen for your goal
- Add value to the experience as the consumer adds incremental screens, i.e., deliver coupons and other rewards utilized via the cloud and accessed anywhere: on laptops/desktops for online transactions and via mobile for in-store use
- Windows 8's consistent UI provides a unified user experience across PCs, tablets, mobile phones and the Xbox gaming consoles. Easy access to cloud-based efficiency tools such as Outlook.com make moving from work to home while getting things done simple and seamless

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While many tech and media companies conduct market research that describes what consumers are doing, the Microsoft Advertising Consumer Insights team believes innovation stems from getting at the why. As a result we go beyond behavior to focus on why consumers do what they do—whether that's choosing one brand over another, or exhibiting a preference for a specific platform. Our goal is to create more robust insights-driven narratives that reveal the people behind the data, making it easier for customers to tell creative, relevant and connected stories across platforms.



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