Multiscreen Generation

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High Level Description

In marketing there is a key framework used which is three C’s which highlights the importance of understanding customers, competitors and corporations. This framework helps shape many decisions that go into how to differentiate and create sustainable business decisions. In this ever changing consumer landscape where we are inundated with new information across platforms, a new framework to understanding this multiscreen world becomes important. Stats alone state that 35% of screen time people are simultaneously watching TV and using a digital device. How then as marketers and consumers of this information can we best be prepared to create and distribute the right information in the right way to reach the right audience? The different channels play different roles and understand and tailoring messaging to meet these needs is critical. Therefore the new three C’s to understand how to create impact in this area as seen from the company as consumer are: Consistent, Connected and Concise. In looking at brands today there are some that are able to differentiate and excel based on abilities to meet these and as we look to the future it becomes ever more apparent to understand the impact of the multiscreen and multimedia era to produce and consume content.

Key Challenges

The challenges arise as there is no one size fits all model for all brands to understand the impact of multi-screens. We live in a global world there is not one uniform global consumer of all this information. As brand managers and producers of content there must be a shift to not only be concerned with producing the right content but understanding what platform best fits to distribute the content.

Challenges include:

- Understanding the role of each device and role that content creation must play to format the message correctly to be effective
- Fluid global landscape, as countries and demographics are shifting and digesting information in new ways. In countries in Africa majority of internet access is granted through mobile phones, however the older consumer targets do not have smart devices which makes reach to this target difficult. Another example is in South Korea where consumers are some of the most digitally and tech savvy there is high penetration of new devices such as a phablet (cross between a phone and a tablet) which can in turn cause challenges when analyzing data and usage patterns.
- Understanding the two modes of multi-screening: sequential and simultaneous. Sequential relates to moving between devices to complete a task and is used widely (98% Americans state they move between devices in the same day). As a brand it is
important to allow consumers to save progress or save items in a cart so as to allow
for this switch between devices and continued engagement. Another challenge is
simultaneous use of devices at the same time for multi-tasking (unrelated activities)
or complementary usage (related activities). As marketers and brands it is
challenging as consumers are doing different activities at the same time (78% multi-
tasking on average); however this also allows for content on one device to trigger
behavior on another and create fluidity of information.

Industries / Groups Impacted

The reality is that there is not one party or group that is solely impacted by the multiscreen
world that we are currently in. This in turn makes understanding the role of devices and
content ever more important and top of mind from all sides. The main groups that are
directly impacted by the multiscreen generation are publishers, advertisers and ultimately
consumers.

For publishers there is the need to ensure that content is readily available on all devices as
multi-tasking and multiscreen use are no longer a future threat but a present reality. The
idea of remaining connected and consistent play a large role for the publishers. The role of
connectivity is allowing consumers to interact with content and stay connected to the brand
wherever they are. As the screen gets smaller it may seem that it could be harder to
integrate branding in meaningful ways but allowing content to flow from devices to extend
the message can prove to be powerful. The technical logistics to create connected content
can have huge creative and consumer benefits. For example, if a TV show has a way to
prompt dialogue on social media, go to site to see extended interviews or have music or
other products that are available to purchase during the episode a consumer is now part of
an ecosystem that all connects. There is not a need to over brand each experience; however
all the aspects of the ecosystem tie back to the publisher’s content. The main idea is to
create fun and interactive ways to engage consumers across platforms that will rise above
the clutter of the digital landscape. The idea of consistency is also important as device
proliferation increases, consumer’s expectation to digest the same content on many devices
will continue to increase. Streaming across platforms and the use of time stamps to depict
where the consumer is in the viewing process to easily pick up on another device are all
important tactics for publishers.

Advertisers must reframe the relationship with consumers from selling to interaction. In
thinking about the marketing mix there is a heavier focus on digital as a larger piece of the
pie as a TV centric approach is too narrow to reach a consumer who is on the go and using
multi-screens while interacting with content. Staying connected, consistent and concise are
important for advertisers. The message of advertisers must translate and connect across
devices so whether a consumer is watching TV, streaming online, visiting a social page or on
their mobile device the branding must remain the same. The way that the content is
represented may change based on the screen; however the core brand attributes and meaning stay the same. As consumers use multi-screens the content on the related sites needs to be timed with show breaks, and fit for mobile to ensure that advertisers are reaching consumers in the right time of purchase (commercial breaks). The messaging from advertisers also must be concise to remain salient. The reason is not only will consumers retain the information but also the messaging will fit the smaller screen (mobile).

Consumers are ever changing in this digital age and different groups have different expectations when it comes to multiscreen use. Outlined are the main consumer groups across the globe and how they consume media and utilize multi-screens in different ways.

- **Digi-craze (20%)** consumer (primarily 35 and under) who has many devices and is constantly multitasking and searching for more information. The main focus for publishers and advertisers is therefore to create interactive multiscreen connections. Examples include TV ads with hashtags and integrated TV and online sponsorships.

- **Phonistas (23%)** who use their mobile device more than any other screen as they are constantly on the go. This group (primarily female) uses their smart device to stay connected to friends socially but also to get advice on new products and stream content. The main focus for publishers and advertisers therefore is to create ads specific to mobile that are concise but also speak to the important brand message. Examples include mobile apps, and social sponsorships.

- **Laptop mafia (15%)** who use their laptop the most of any screen and primarily go to brand websites and share videos through links with friends. This group (primarily male) tends to be working on their computer for work and therefore also use their laptop to stream content. The main focus for publishers and advertisers therefore is to create ads for laptops, and also micro-video and TV ads with web URL’s to easily share.

- **Digital-dinos (42%)** this group is not using multi-screens and still relies solely on TV to digest most content. This group (primarily over 40) though getting smaller and smaller remains important for publishers and advertisers as they are difficult to target and prove that screens do operate in isolation. This group still relies on TV for media and offline for advertising (print, outdoor or radio).

### Best / Representative Practices

The way to understand multiscreen use is to understand the role of each device. In doing so brands are able to deliver the right content on the right device to meet the needs of their target consumers.

Based on recent studies the average American spends time across four primary media devices: Smartphones, Tablets, Laptops and TV. The largest reason to choose one device over another is due to content: time, goals and location.
Computers are best used for education, work and productivity with a task. The use of the device is primarily in the home or at work (69%) and on average consumes 24% of the daily media use. The laptop is used for focused activity and less for leisure, and therefore a brand should focus to help consumers create, stay organized, get work done compare purchases and shop online as seamless as possible.

Smartphones are focused to keep consumers connected. The use of the device is primarily at home (60%) but content must be able to be digested on the go as mobile consumes 38% of daily media use. This device is the most personal and therefore target messaging, promotions and customized language works best with consumers. This device is the most common starting place for search and therefore as a brand mobile first mindset is ever more important for success.

Tablets are used mostly for entertainment, shopping and exploration. The use of the device is primarily at home (79%) and consumes only around 9% of daily media use. This device is primarily used for leisure and entertainment, and therefore marketers must create more multi-dimensional experiences through rich media and videos to adhere to consumer needs.

TV remains the everyman and most popular device for multi-screening. TV is seen as a more passive device and used primary for entertainment. As marketers there is a strong need to break through the clutter and create a meaningful message that is concise and memorable, as around 77% of viewers today are also using another device when watching TV. TV is a catalyst for search and therefore as brands and marketers there is a need to still have strong branding and advertising through TV to drive consumers to connect to other devices. As advertisers and publishers there is opportunity to integrate across devices and streamline messaging to allow for multi-screen use.

Business Benefit

The largest benefit from a business perspective is understanding how to target certain consumer groups and understand their media consumption, device preference and underlying demographics. The exhibits (A-D) showcase the demographic breakdowns between smartphone, online video and TV. These metrics in conjunction with understanding the role of each device are critical for brands as their tailor their messaging and target their audience on certain screens. The quantifying data is difficult to decipher in terms of specific ROI measures, however engagement metrics (brand awareness, likes, shares etc.) can be a powerful tool for brands which is enhanced through multi-screens. Understanding who is using your device for what activity and targeting the message appropriately helps brand loyalist and new consumers connect with your brand.

Case Examples

Through different case studies the importance of concise messaging, connected devices, and consistent messaging are critical to attain success in a multiscreen generation.
Sailthru is a firm that is playing a pivotal role in creating a customized experience for consumers as they consume content across different platforms. The belief is that through personalized connection and content a consumer is much more willing to interact with your brand. This personalization must be pushed across channels based on the ways in which consumers use specific devices. The firm creates a profile for consumers based on data consumption patterns to help brands know when and where to push out messaging. For example, if brands know that a user primarily clicks into emails around 9 in the morning and 3pm, 5 days a week and has spent around $500 in the last month shopping for similar items they can tailor the messaging to create a 1:1 conversation. It is no longer enough to send a blast email with just a personalized name, brands must work to create a meaningful customized message tailored to the device the consumer is using. Sailthru has worked with clients such as Everlane, a quality apparel designer who had a large consumer base that they were not able to manage. Sailthru allowed Everlane to segment users based on our pre-defined and their custom-created variables, and target users based on their interests to glean insights that have resulted in a 128% increase in user growth, 28% increase in average open rate for email and a 100% increase in clicks on recommended products. This level of personalization and connectivity shows lift in revenue for brands and continued longevity of brand engagement post 30 days of content.

Pepsi is a great example of a brand who uses consistent messaging in ways to engage the consumer. The ‘Get Hyped for Halftime” show is a prime example of how the brand was able to share a common message across screens for a sustained period to excite consumers. The campaign started through a PR sent through social media and online. The media around the event included a television commercial, viral videos, hashtags and vines all focused around gaining hype for the half time Super Bowl show. The content was not just focused around Pepsi the product but the experience that consumers have with music, football and fun to create a more personalized connection.

Domino’s X-factor app is a great example of a partnership that has shown how staying connected through devices and to the consumer is impactful. The Domino’s app was integrated with the X-factor show (users became the fifth judge on the show) in a way that was engaging and interactive. This app promoted not only the show but also the Domino’s product as consumers could order food directly from the app. This idea of connectivity was through the device but also the creative. The Domino’s logo was placed on the TV branding as well as the app to continue the partnership between screens. Domino’s advertised on TV and on the App as well as created interactive games about the show to keep consumers engaged and ultimately enticed them to order!

Vivo, a Brazilian telecom brand used the power of being concise to engage consumers in a campaign through social media and TV about the power of their network. The messaging was focused around a simple hashtag “#pegabem” which translates to “wonderful or good”. The focus was to allow consumers to engage through posting moments that spoke to this hashtag. The consumers felt connected to the brand through a simple tactic. The brand was
able to leverage the power of consumer’s social network and also connect to both the mission of the company ‘good network connectivity’. The campaign was consistent and connected across Facebook, a campaign website and also promoted through TV commercial.

Conclusion

Multiscreen generation is a reality that as consumers we are not only faced with many messages throughout the day, but also consume those messages differently according to the screen that we are using. As consumers, publishers and advertisers it is ever important to understand the role of content, and the role of devices to ensure that the right people are viewing the right messages on the right devices. To create meaningful differentiation in this area the ideals of Consistent, Connected and Concise content, as well as personalization and customization are critical. Through case studies across industries and geographies it is clear that as the digital footprint expands and technology advances, consumers demand interactive and valuable experiences throughout the day and device.

Exhibits

Demographics:

(A)- Gender

SMARTPHONE
50% FEMALE
50% MALE

SMARTPHONE VIDEO
49% FEMALE
51% MALE

ONLINE VIDEO
53% FEMALE
47% MALE

TELEVISION
54% FEMALE
46% MALE
(B)- Age

- Smartphone Users: 16% Ages 18-24, 22% Ages 25-34, 38% Ages 35-54, 24% Ages 55+
- Smartphone Video Users: 12% Ages 18-24, 25% Ages 25-34, 38% Ages 35-54, 18% Ages 55+
- Online Video Users: 12% Ages 18-24, 18% Ages 25-34, 40% Ages 35-54, 30% Ages 55+
- Television Users: 8% Ages 18-24, 13% Ages 25-34, 34% Ages 35-54, 45% Ages 55+

(C)- Household Income

- Smartphone Users: < 50K 27%, 50-75K 20%, 75-100K 15%, 100-150K 18%, 150K+ 10%
- Smartphone Video Users: < 50K 40%, 50-75K 20%, 75-100K 14%, 100-150K 17%, 150K+ 9%
- Online Video Users: < 50K 39%, 50-75K 24%, 75-100K 17%, 100-150K 14%, 150K+ 7%
- Television Users: < 50K 52%, 50-75K 22%, 75-100K 11%, 100-150K 10%, 150K+ 6%

(D)- Ethnicity

- Smartphone Users: Other 9%, Asian 6%, Black 13%, White 73%
- Smartphone Video Users: Other 10%, Asian 6%, Black 14%, White 70%
- Online Video Users: Other 8%, Asian 4%, Black 12%, White 77%
- Television Users: Other 10%, Asian 3%, Black 17%, White 70%
Works Cited:


In person interviews:

- Cassie Lancellotti Young, VP Customer Success, Sailthru
- Ken Strand, VP Commercial Integration, PepsiCo