

# CATCH ME IF YOU CAN! 2.0

Update of Multi-Screen Baseline Study



# Catch Me If You Can! – 2013 Baseline Study: The Five Most Important Facts



E-paper:  
[www.multi-screen.eu](http://www.multi-screen.eu)

1. Multi-screen is practised media reality
2. Screens are used in any combination
3. There is NO first screen
4. Multi-screen situations are generally independent with regard to their content
5. Email portals are the central entry point for multi-screen situations

Update of the baseline study to answer the following questions:

- Has the share of multi-screen use changed since 2013?
- Which devices are used most often in multi-screen situations? Are there any changes since 2013?
- Which device combinations are being increasingly used by multi-screen users in 2015?
- What are the top activities in multi-screen situations in 2015?
- Has the attitude of Internet users changed with regard to multi-screen use?

# Representative Internet Study Using Custom Online Panel

## 2015 Update of the 2013 Catch Me If You Can! Study

### Subject of analysis

- Representative Internet Study using custom online panel
- Basis: Internet users from 14–59 years
- Data weighted by AGOF digital facts 2015-06 (cross-referenced by age, gender and education)
- N=1,005

### Valid comparison to 2013

Both waves:

- Representative Internet Study using custom online panel
- Weighted by the respectively updated AGOF waves; cross-referenced by age, gender and education
- Internet users from 14–59 years

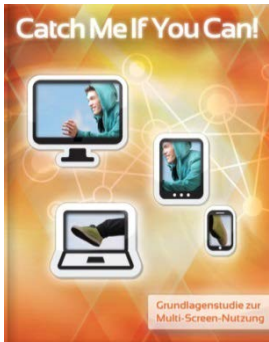
Institute conducting  
survey:

**dcore**

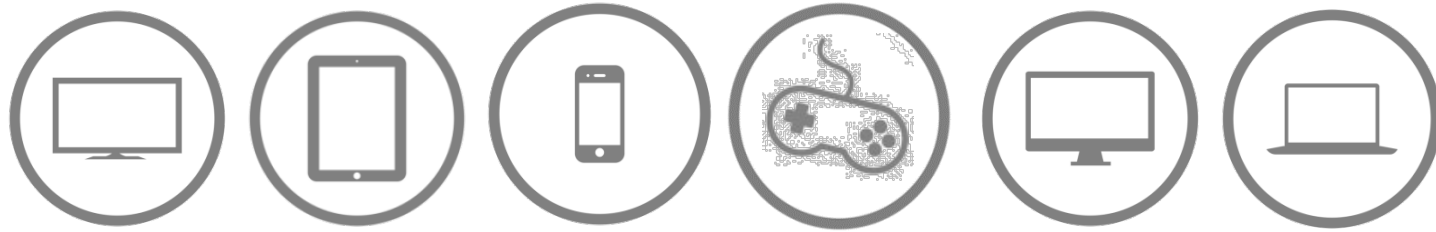
Initiator:

**united  
internet  
media**

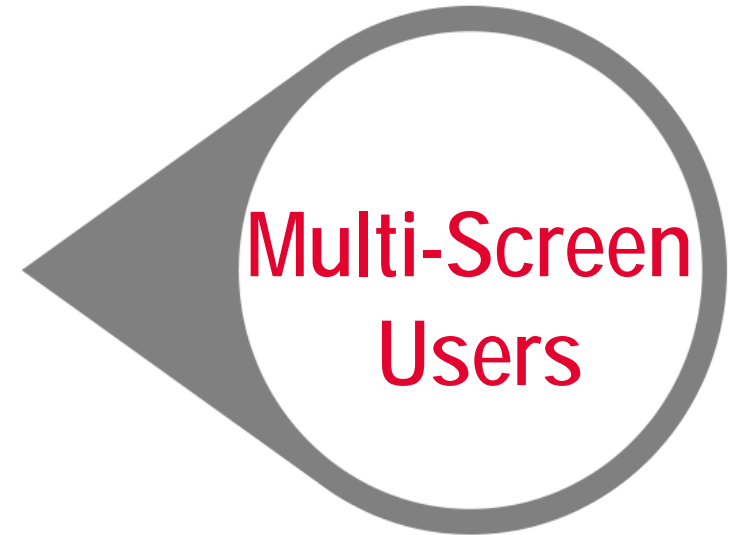
2013  
Catch Me If You Can!



## Definition of Multi-Screen Users: Use a Minimum of Two Screen-Based Media



Simultaneous use of at least two devices to watch videos or TV, surf the Internet or run apps.



# SUMMARY

# Significant Increase of Multi-Screen Users from 86% to 89% - So 9 Out of 10 Internet Users are Multi-Screen Users

## Update of Catch Me If You Can!

Increase of smartphone and tablet users since 2013 by almost 30% and 80%, respectively  
Share: 90% smartphone and 57% tablet users

**Significant increase of multi-screen users from 86% to 89%**  
Increase especially among women and the 50-59 age group

**Half of multi-screen users are heavy multi-screen users**  
Daily (several times) multi-screen use

New  
in 2015!

**Combination of TV and smartphone replaces TV and laptop**  
Two-thirds of multi-screen users use combination of TV and smartphone; share of TV and laptop is 55%

Device combinations with smartphone are increasing;  
combinations with Tablet and TV combinations without smartphone are decreasing

Decrease of users who use laptop (-6%) or tablet (-18%) in multi-screen situations  
65% and 47% of device users use the respective device for multi-screen

## Email is still the Central Entry Point to the Internet for Multi-Screen Situations

### Update of Catch Me If You Can!

More multi-screen users who do not correlate TV and Internet for simultaneous use  
Share of 90%; increase by 6%

**TV commercial breaks are used even more for online activities**

Top-3 box agreement of 81%; increase by 23%

**Email is still the central entry point to the Internet for multi-screen situations**

Almost 80% of multi-screen users read/write emails in multi-screen situations

Increase of activities from areas of social media/entertainment in multi-screen situations

Decrease for activities of organisational nature such as the area of personal business matters

The prevalence of multi-screen use has increased even more, but activities and device use are subject to change.

# INSIGHTS DERIVED FOR MEDIA PLANNING





# Developing Additional Impact Potential Through Comprehensive Online and TV Planning

## Media plan

- Integration of **online and mobile, big, mid and small screen and classic TV** commercial in the media plan
- **Content coordination of online and TV campaign** and use of **online-optimised TV contents**
- Time-based **synchronisation of TV and online plans** depending on product category and communication goal (high online reach required)



## Contacts

- **Practical device sequence** that considers media use of target group, communication goal and product category
- Definition of a **story** that is communicated to the target group based on the contact sequence, which is **built upon each previous step**
- Contact-optimised addressing of target group with **cross-device frequency capping**

## Online advertising media

- Use of **various advertising media formats and designs** depending on employed devices and communication goal
- Use of **multi-screen advertising media** (e.g. **responsive** advertising media based on **HTML5/CSS** technology)



**Consideration of specific online activities:** Almost 80% of multi-screen users read/write emails in multi-screen situations. This makes **online portals a central entry point for multi-screen campaigns.**

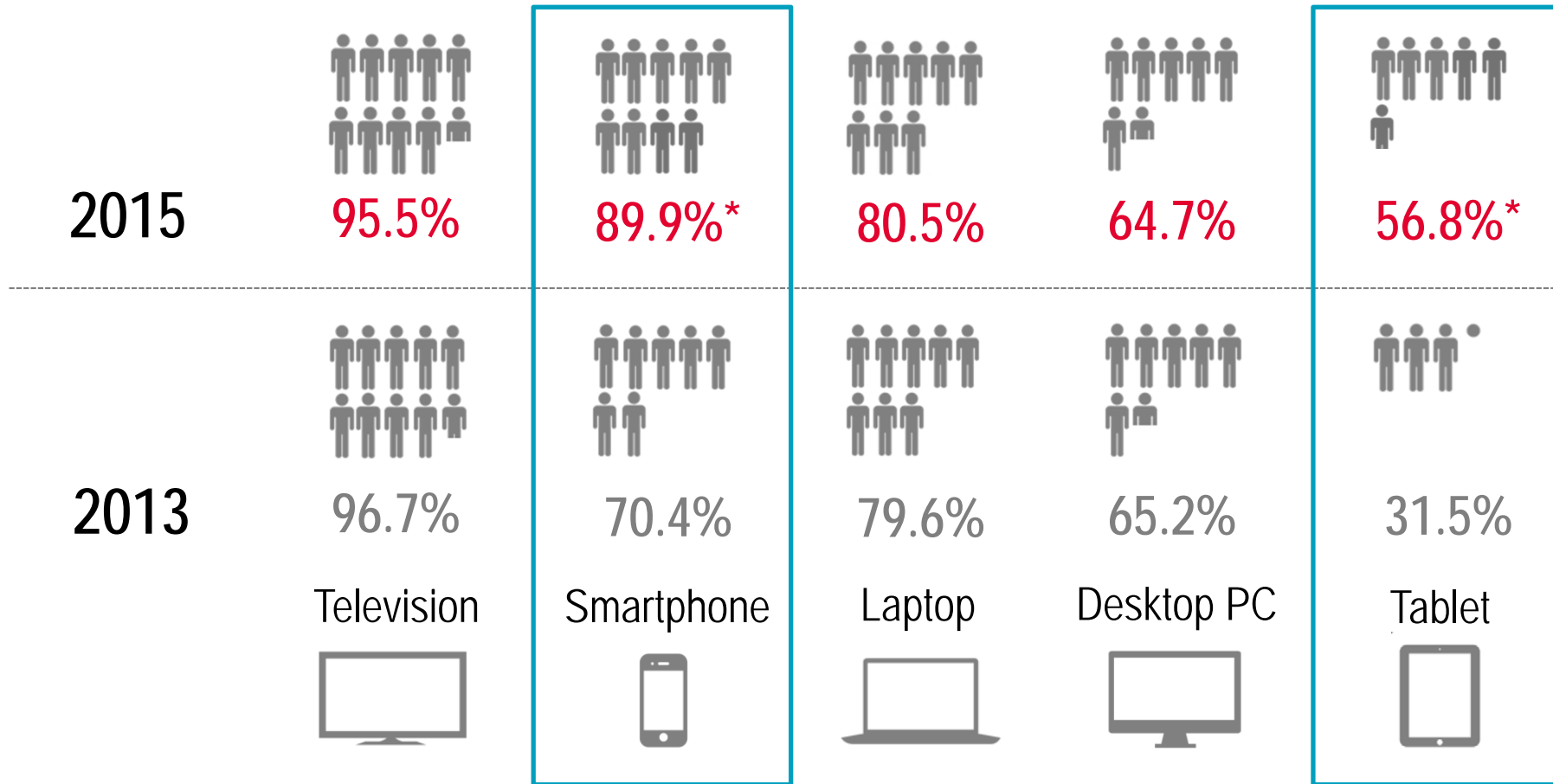
Concrete campaign design depending on target group, product and communication goal

# RESULTS



# Increase of Smartphone Users by Almost 30%, Tablet Users Almost Doubled and Slight User Decrease for TV

## Device users

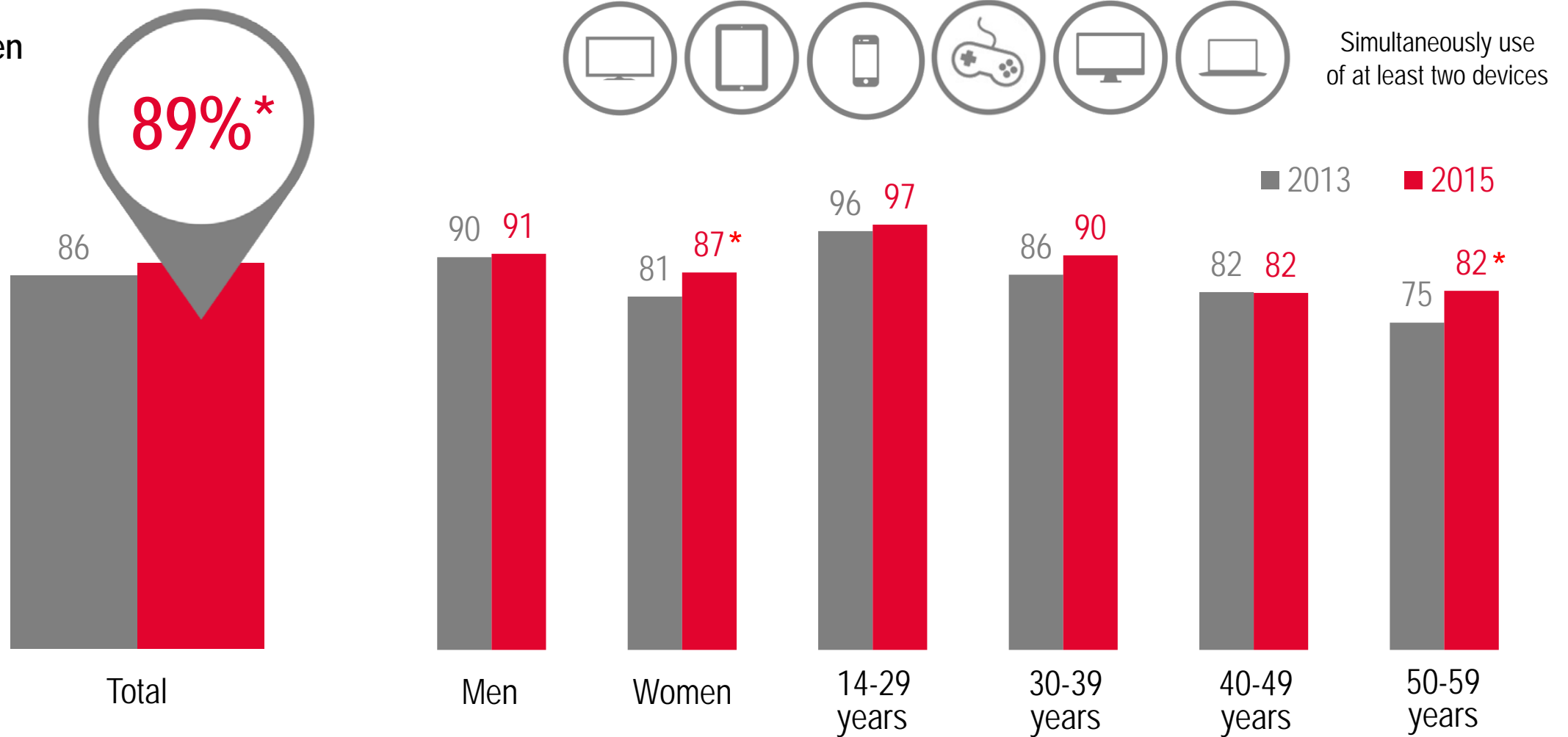


Respective device users:  
 "available in the household, I use it" and "not available in the household, but I use it (e.g. borrow from friends or acquaintances)"

Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: Internet users 14–59 years, n=1,005  
 Catch Me If You Can! – Interactive Media, United Internet Media; basis: Internet users 14–59 years, n=1,251; \*significant change

# Significant Increase of Multi-Screen Users to Almost 90% – Especially Women and Older Persons Have Caught Up

Multi-screen  
users in %



Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: Internet users 14–59 years, n=1,005  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: Internet users 14–59 years, n=1,251; \*significant change

# Half of Multi-Screen Users Are Heavy Multi-Screen Users

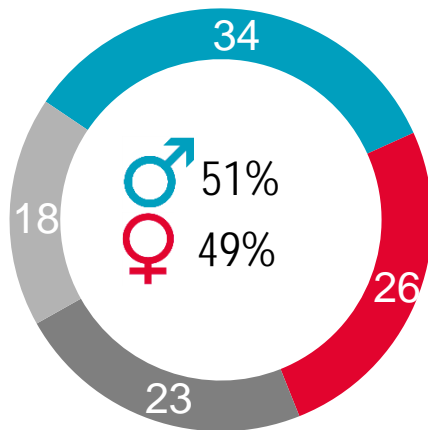
## Light Multi-Screen Users Are Older and Show a Higher Share of Women

New  
in 2015!

### Heavy multi-screen users

(several times)  
daily

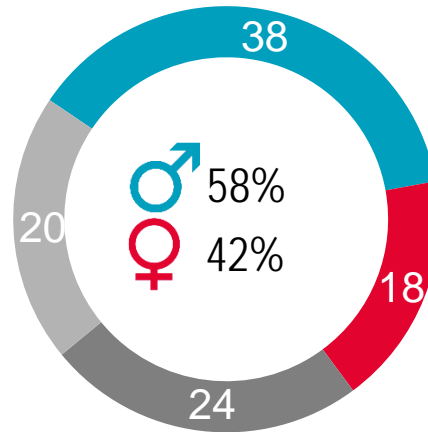
48%



### Medium multi-screen users

1-2 times per week /  
several times per week

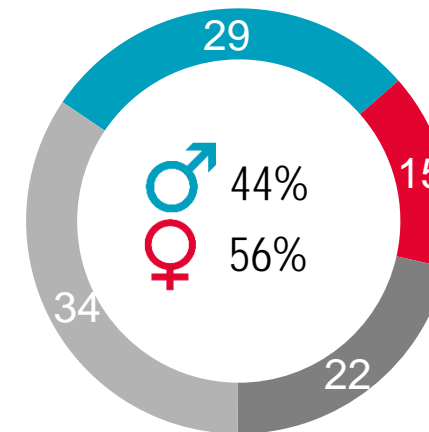
39%



### Light multi-screen users

several times / 1-2 times per  
month / less often

13%








Simultaneously use of at least  
two devices; share of total  
multi-screen users

- 14-29 years
- 30-39 years
- 40-49 years
- 50-59 years

Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: multi-screen users 14-59 years, n = 892  
Heavy multi-screen users (n=429), medium multi-screen users (n=347) and light multi-screen users (n=115)

## Tablet and Smartphone Use is Least Prevalent Among Light Multi-Screen Users

New  
in 2015!

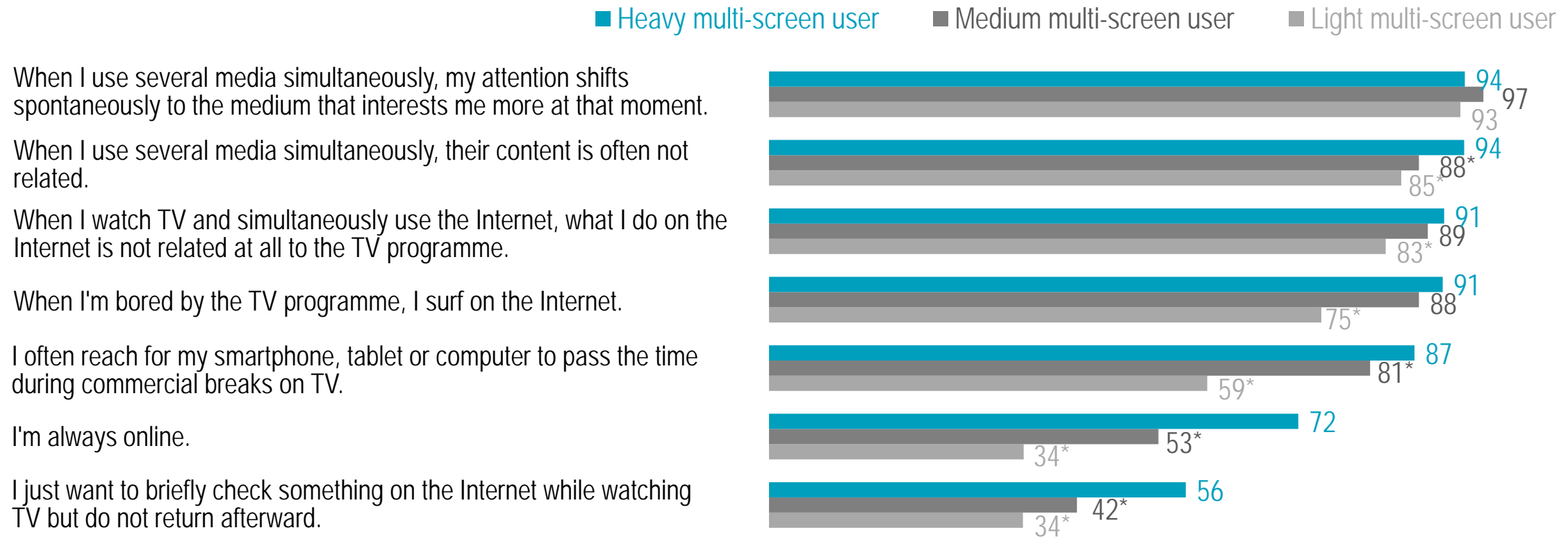
		Heavy multi-screen users (several times) daily	Medium multi-screen users 1-2 times per week / several times per week	Light multi-screen users several times / 1-2 times per month/ less often
Device users				
Television		94%	98%	100%
Smartphone		92%	94%	85%
Laptop		81%	84%	82%
Desktop PC		65%	65%	62%
Tablet		63%	57%	52%

Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: heavy multi-screen users (n=429), medium multi-screen users (n=347) and light multi-screen users (n=115)

# Significant Differences between Heavy, Medium and Light Multi-Screen Users Re Their Media Use: Even One-Third of Light Multi-Screen Users Indicate that they are Always Online

New  
in 2015!

Statements on multi-screen use, top-3 box, in %  
6-point scale: from strongly agree to strongly disagree

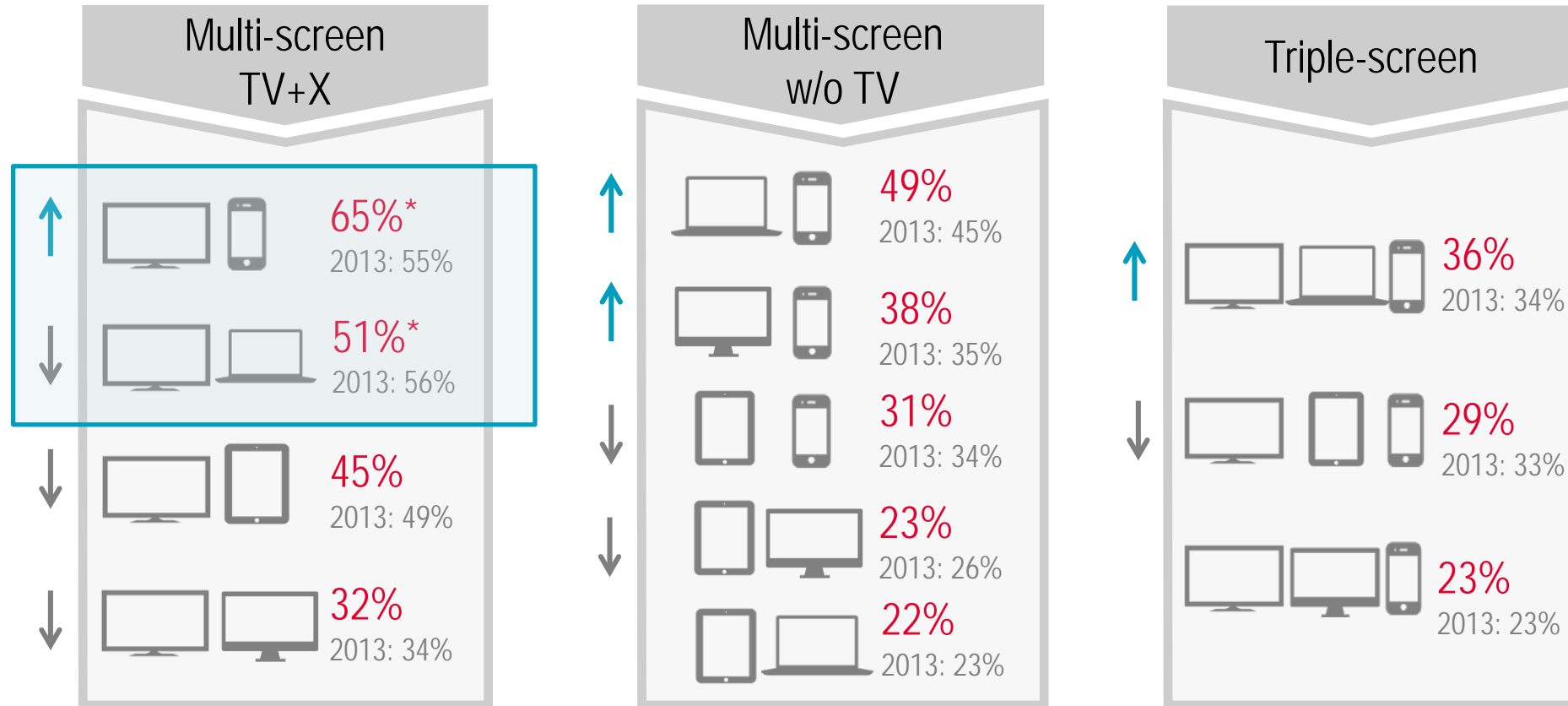


Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: heavy multi-screen users (n=429), medium multi-screen users (n=347) und light multi-screen users (n=115)

\*significant change to heavy multi-screen users

# TV & Smartphone Replaces TV & Laptop in Top Position: Two-Thirds of Multi-Screen Users Use TV and Smartphone in Multi-Screen Situations; Combinations with Tablet and TV Combinations without Smartphone are Declining

## Multi-screen combinations

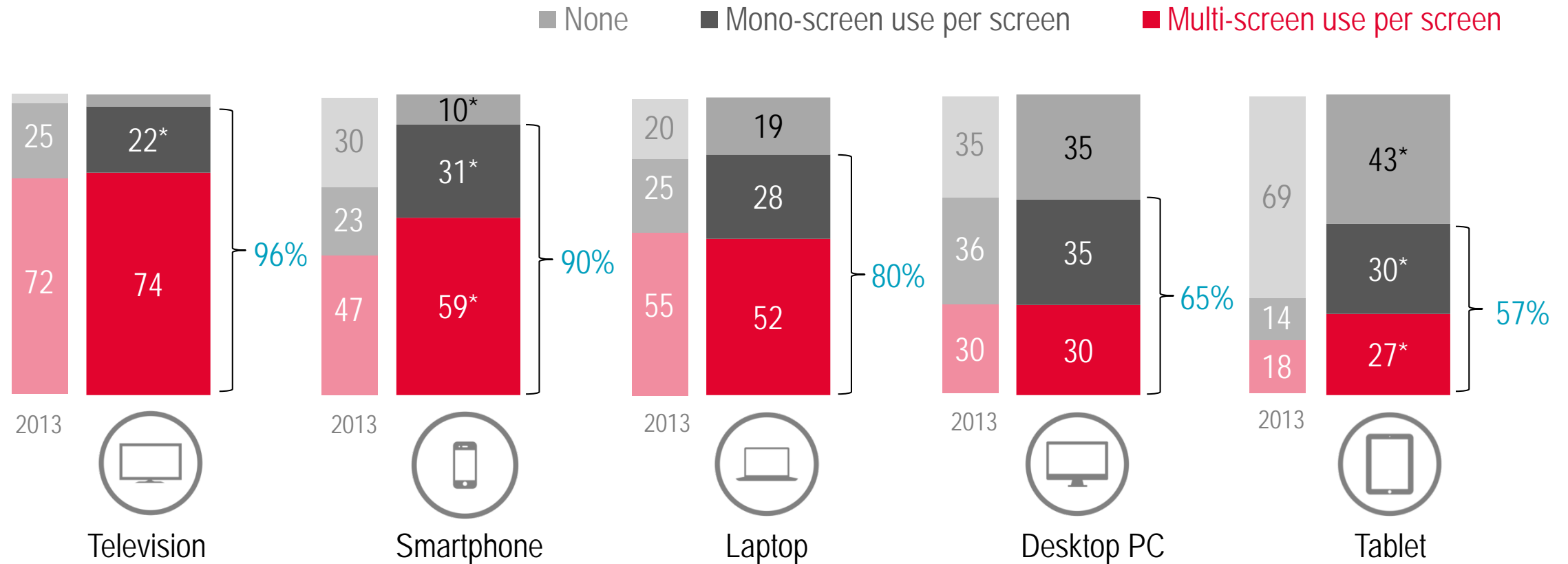


Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: multi-screen users 14–59 years, n = 892 respective device users, (very) frequent simultaneous use  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: multi-screen users 14–59 years, n=1,070 respective device users, (very) frequent simultaneous use; \*significant change



# Smartphone and Tablet: Decrease of Non-Users Leads to Significant Increase of Mono- and Multi-Screen Use TV Becomes Even More of a Multi-Screen Medium

General screen use and use in multi-screen situations, in %



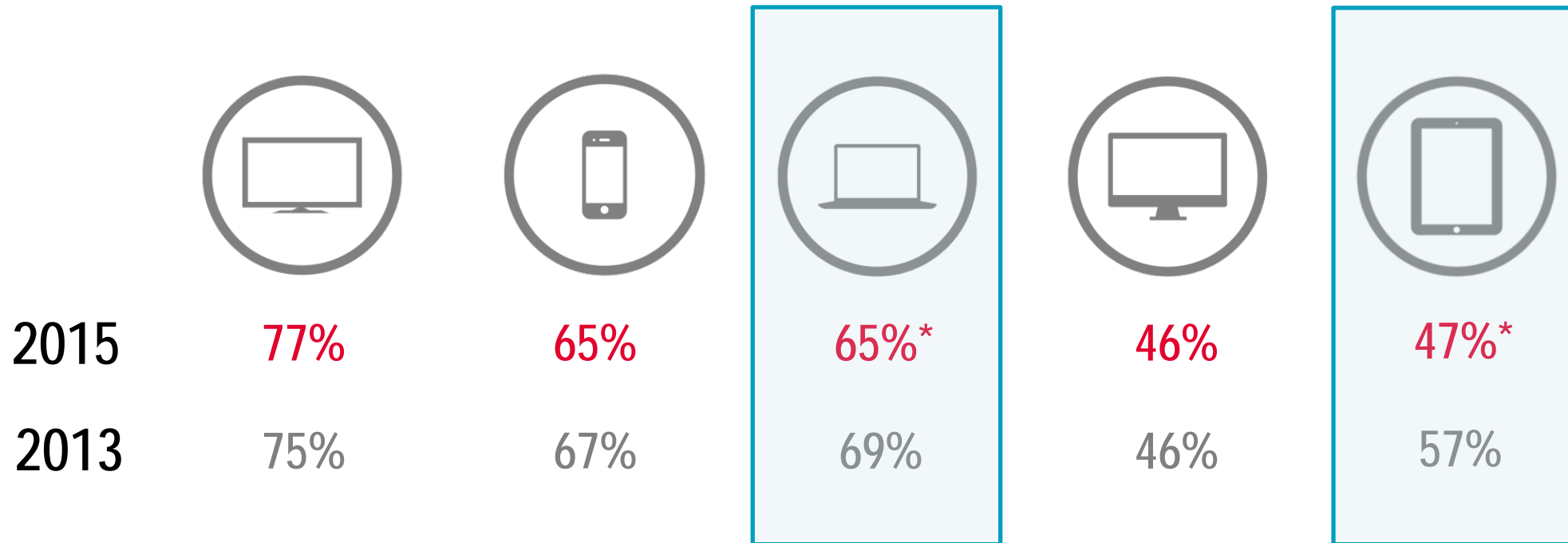
Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: Internet users 14–59 years, n = 1,005

Catch Me If You Can! – Interactive Media, United Internet Media; basis: Internet users 14–59 years, n=1,251, deviations of 100% are due to rounding; \*significant change

## 2015: Tablet and Laptop Used by Fewer Device Users in Multi-Screen Situations (Decrease of Almost 20% for Tablet)

Screen use in multi-screen situations, share of device users  
who use the device in multi-screen situations

The share of Internet users who use tablets in multi-screen situations increased (see previous chart), but the share of tablet users who use the device in multi-screen situations decreased.

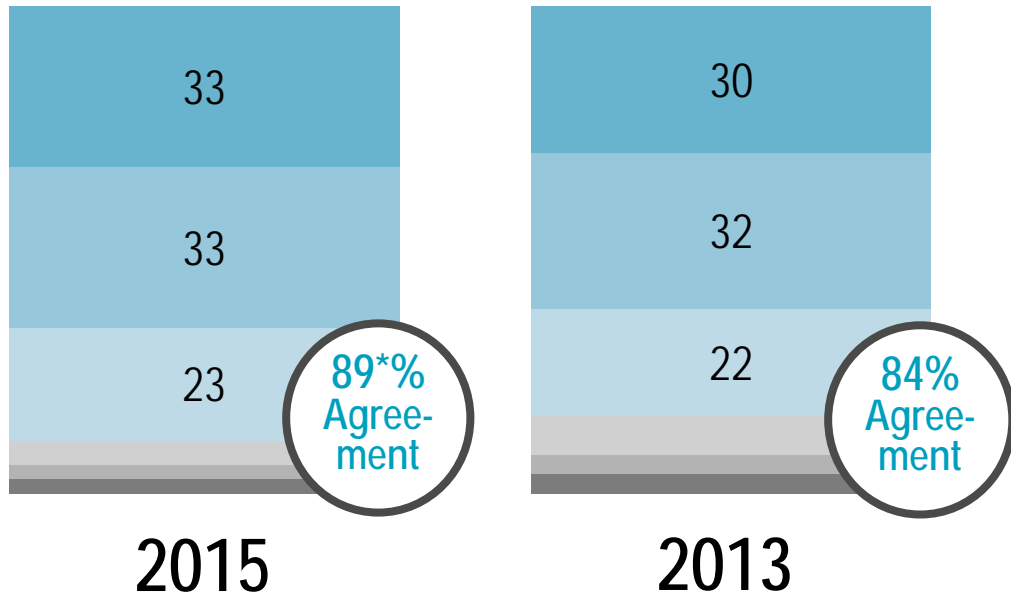


Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: Internet users 14–59 years, n = 1,005, respective device users  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: Internet users 14–59 years, n=1,251; respective device users; \*significant change

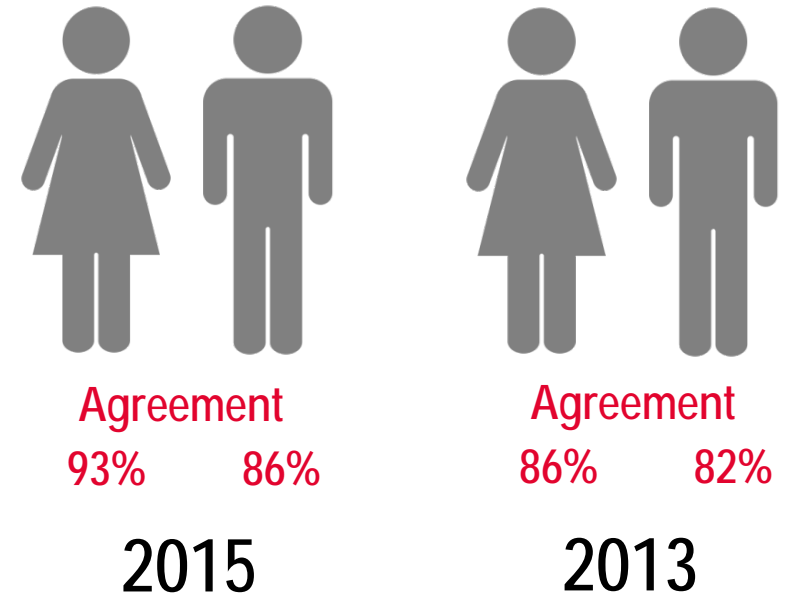
# No Content-Related Connection During Simultaneous TV and Internet Use for Majority of Multi-Screen Users Even More Pronounced than in 2013

Content-related correlation during simultaneous TV and Internet use on 6-point scale, in %

■ Strongly agree ■ Strongly disagree



*"When I watch TV and simultaneously use the Internet, what I do on the Internet is not related to the TV programme."*

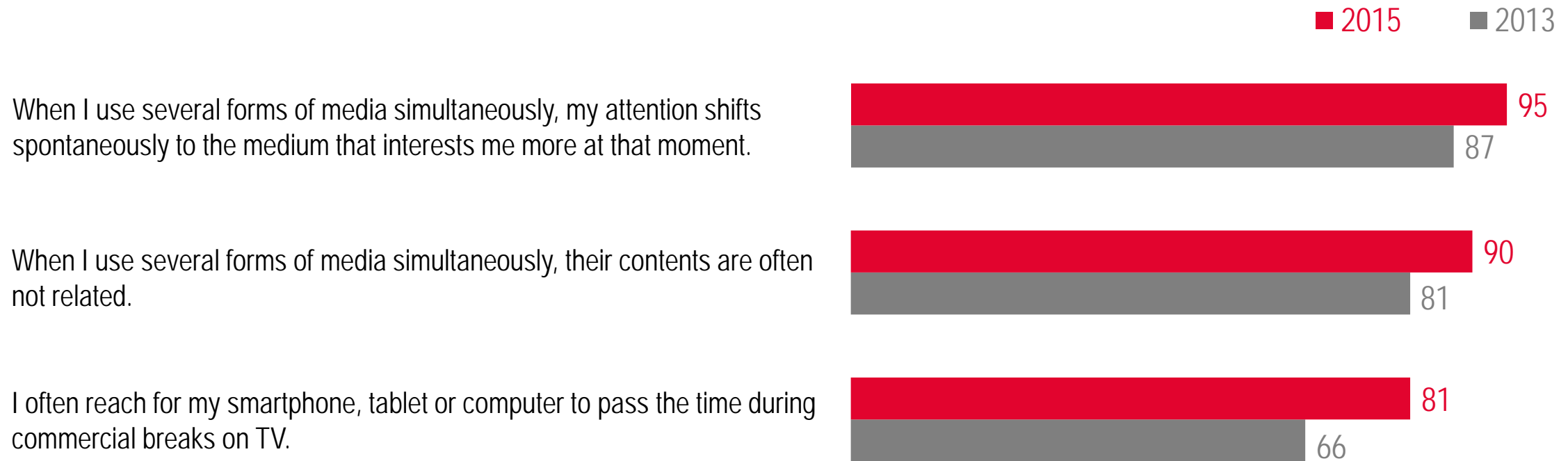


Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: multi-screen users 14–59 years, n = 1,070  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: multi-screen users 14–59 years, n=892; \*significant change

## The First Screen is the Respective Screen that Attracts Initial Attention: Agreement Increased by 10%

### 2015: TV Commercial Breaks are Used Even More for Online Activities

Statements on multi-screen use; top-3 box, in %  
6-point scale: from strongly agree to strongly disagree



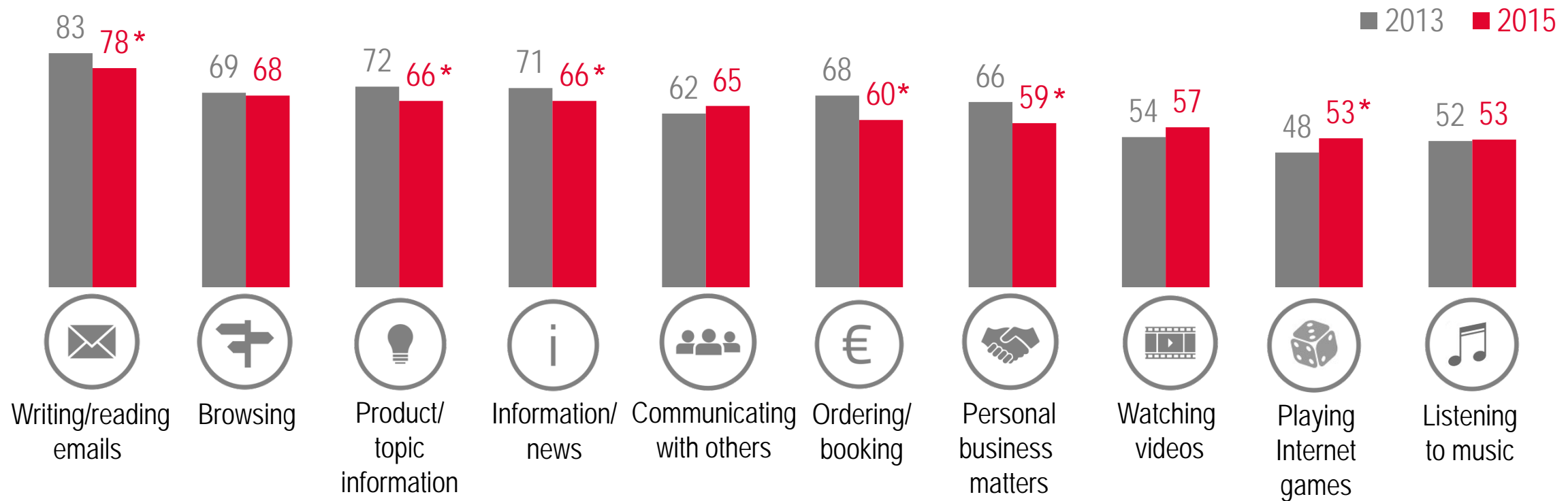
Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: multi-screen users 14–59 years, n = 1,070  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: multi-screen users 14–59 years, n=892; \*all changes are significant

# Email is Still the Central Entry Point to the Internet for Multi-Screen Situations

## Decrease for Activities of Organisational Nature; Increase in Area of Social Media and Entertainment

### Activities in multi-screen situations, in %

Possible explanation for decreases: For some activities, users most likely develop some type of routine over the course of time and performs these activities less frequently. Their attention shifts to other activities instead. Multi-screen users have possibly turned increasingly to activities in multi-screen situations over the last two years that were not considered within the scope of this study such as using online services for sharing photos or blogging. A continuation of this study may provide more information about this question in the future.



Source: Catch Me If You Can! 2015 – United Internet Media GmbH; basis: multi-screen users, 14–59 years, n=892  
Catch Me If You Can! – Interactive Media, United Internet Media; basis: multi-screen users 14–59 years, n=1,070



Comprehensive Online and TV planning that considers dispersed attention and the target group's specific activities opens up additional impact potentials.

This can be achieved through content- and time-based synchronisation of multiple contacts by using multi-screen advertising media.

This creates touch points with users and increases the prospects of intensive interaction with the advertised product.

# CATCH ME IF YOU CAN! 2.0

Update Multi-Screen-Grundlagenstudie

NEU:

Jetzt mit Ergebnissen zu  
Heavy Multi Screenern



All study results in the  
brochure are available for  
download:

[www.multi-screen.eu](http://www.multi-screen.eu)

## VORWORT



Liebe Leserin,  
lieber Leser,

unser Alltag verändert sich. Die Zahl der Bildschirme, über die wir Inhalte empfangen und auch versenden erhöht sich rasant. Die mobile Internetnutzung ist allgegenwärtig:

Laut der Arbeitsgemeinschaft Online-Forschung (AGOF) ist über die Hälfte der deutschsprachigen Wohnbevölkerung ab 14 Jahren inzwischen im mobilen Internet unterwegs – das sind knapp 58 Millionen Menschen<sup>1</sup>. Im Vergleich: 2013 waren es noch rund 27 Millionen Menschen<sup>2</sup>. Tendenz: weiterhin steigend.

Damit einhergehend gibt es immer mehr und bessere Zugänge zur digitalen Welt: Die Telekommunikationsunternehmen stellen leistungsfähigere Mobilfunkstandards zur Verfügung, gleichzeitig werden die verfügbaren W-Lan-Hotspots ausgebaut. Smartphones dienen uns als Türöffner in die digitale Welt und gehören zu unseren ständigen Begleitern. Zudem verbessert sich die Ausstattung mit internetfähigen Geräten: Die Deutschen nutzen Tablets, Notebooks, PCs und auch TV-Geräte, um über das Internet Inhalte zu empfangen und zu senden. Die Verbreitung von Wearables wie Smartwatches ist noch vergleichsweise gering, doch in ein paar Jahren werden auch diese Geräte zum festen Bestandteil des digitalen Konsums gehören. Der Umgang mit Medien verändert sich stetig – vor allem hinsichtlich des Paralleleinsatzes von Bildschirmen, der Multi-Screen-Nutzung. Umso wichtiger ist die Anpassung des Marketings.

Mit „Catch Me If You Can! 2.0“ führen wir unsere Forschungsreihe zum Parallelkonsum von Medien fort. Die erste Ausgabe aus dem Jahr 2013 gab Einblicke in die Multi-Screen-Nutzung und deren mögliche Folgen für Werbewahrnehmung und -wirkung.

»Der Umgang mit Medien verändert sich stetig – vor allem hinsichtlich der Parallelnutzung mehrerer Screens.«

Rasmus Glese, Geschäftsführer

Tatsächlich ergaben sich alleine in den letzten zwei Jahren teilweise erhebliche Veränderungen im Verhalten der Medienkonsumenten. Wichtigstes Ergebnis: Den einen First Screen gibt es nach wie vor nicht. Je nach Nutzungssituation ändert sich das bevorzugte Gerät. Aber die Kombinationen ändern sich: Das Smartphone hat beispielsweise die Rolle als wichtigster digitaler Screen in der Parallelnutzung im Zusammenspiel mit der TV-Nutzung übernommen. Diese Position hatte zuvor noch das Notebook inne. Das Studien-Update „Catch Me If You Can! 2.0“ bildet die neuen Nutzungsmuster und Motivationen ab. Mit unseren Daten können wir konkrete Handlungsempfehlungen für die Kommunikationsstrategie und die Mediaplanung abgeben.

Die sich stetig verändernde Multi-Screen-Nutzung erfordert auch von der Werbebranche neue Bewertungs-, Planungs- und Gestaltungskriterien zur medialen sowie kreativen Ansprache der Zielgruppen.

Entdecken Sie mit uns die neue Multi-Screen-Realität und leiten Sie daraus wichtige Erkenntnisse für Ihre Zielgruppenansprache und Markenführung ab.

Herzliche Grüße

Rasmus Glese  
Geschäftsführer

<sup>1</sup> AGOF digital facts 2016-10, Nutzer mobile Angebote letzte drei Monate, 37,81 Mio. U19/Monat

<sup>2</sup> AGOF mobile facts 2015-03, 37,31 Mio. deutschsprachige Personen ab 14 Jahren in Deutschland haben innerhalb eines Monats das mobile Internet genutzt

Thank You for Your Attention!



**Daniela Schnedl**

Junior Project Manager Market Research

Telephone: +49 721 91374 -6740

Email: [daniela.schnedl@united-internet-media.de](mailto:daniela.schnedl@united-internet-media.de)

Web: [www.united-internet-media.de](http://www.united-internet-media.de)