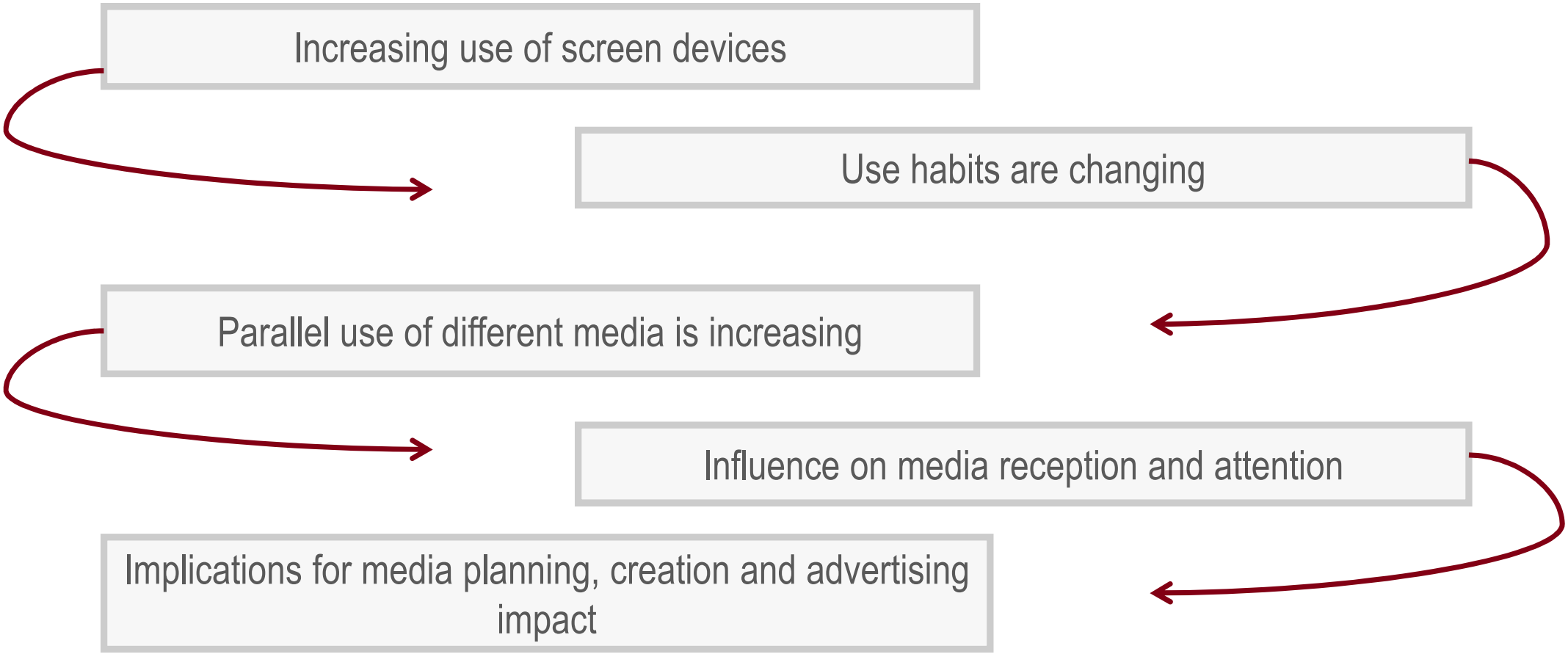
MULTI-SCREEN – A PEEK INTO THE LIVING ROOM

New Findings On Multi-Screen

What Is This About?



WHAT WE ALREADY KNOW…

Catch Me If You Can! – 2013 Baseline Study
The Five Most Important Facts About Multi-Screen

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 regards to their content
5. Email portals are the central entry point for Multi-Screen situations

shortlisted for:
research awards 2014
Powered by INTERACT PARIS 2014

2014 FOLLOW-UP STUDY: ETHNOGRAPHIC MULTI-SCREEN STUDY

MULTI-SCREEN – A PEEK INTO THE LIVING ROOM

ETHNOGRAPHIC MULTI-SCREEN STUDY

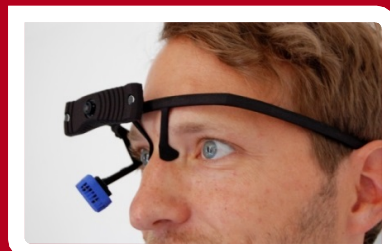
20 HOUSEHOLDS IN APRIL/MAY 2014 IN BERLIN

2 HOURS OF MEDIA CONSUMPTION

OWN AT LEAST 2 DEVICES IN ADDITION TO TV

Home Ethnographics

Technology



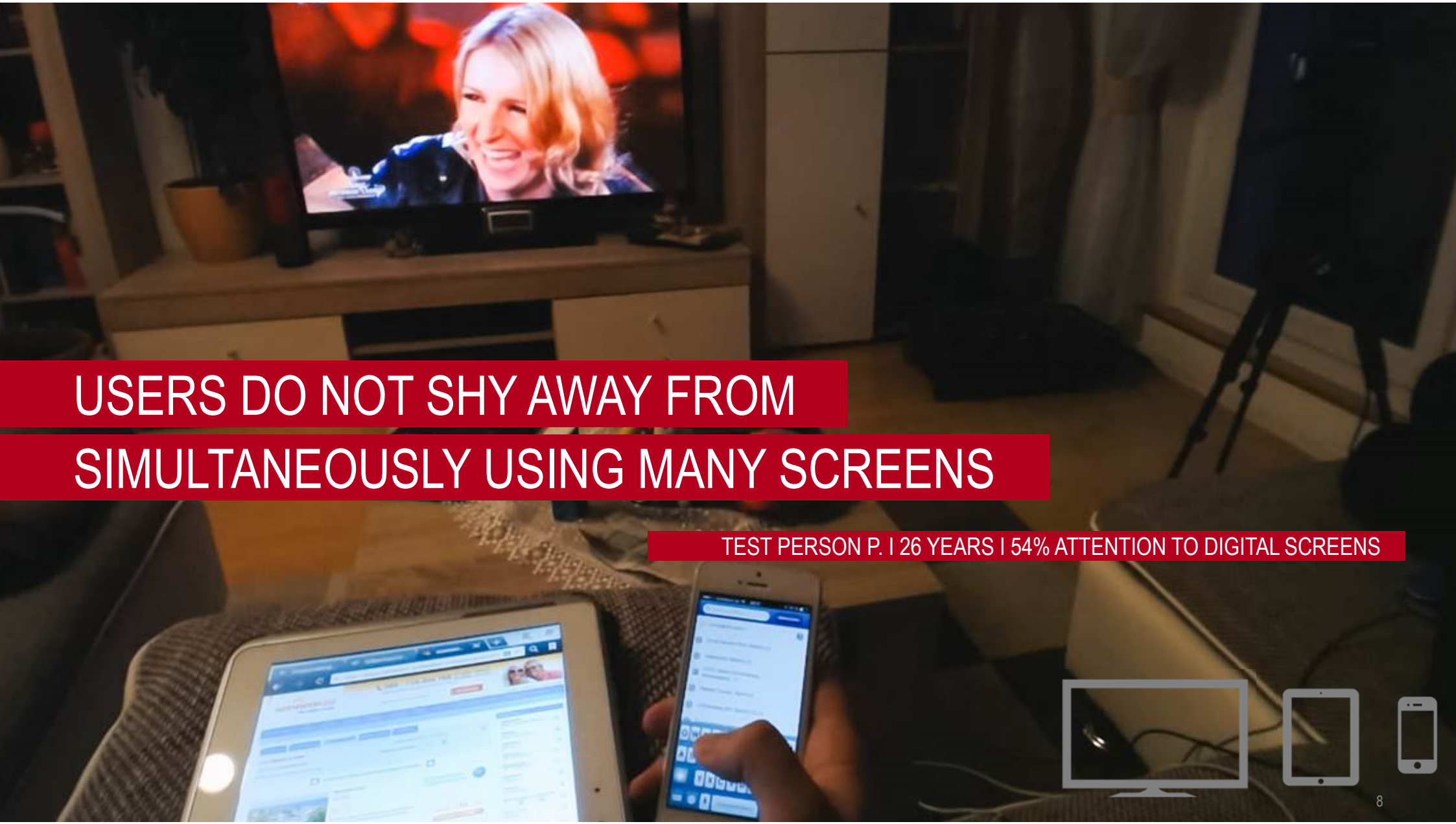
Subject of analysis

- Multi-Screen situation @home
- Multi-Screen users
- Use of one or more combinations
- Age: 18 to 59 years

Analysed devices

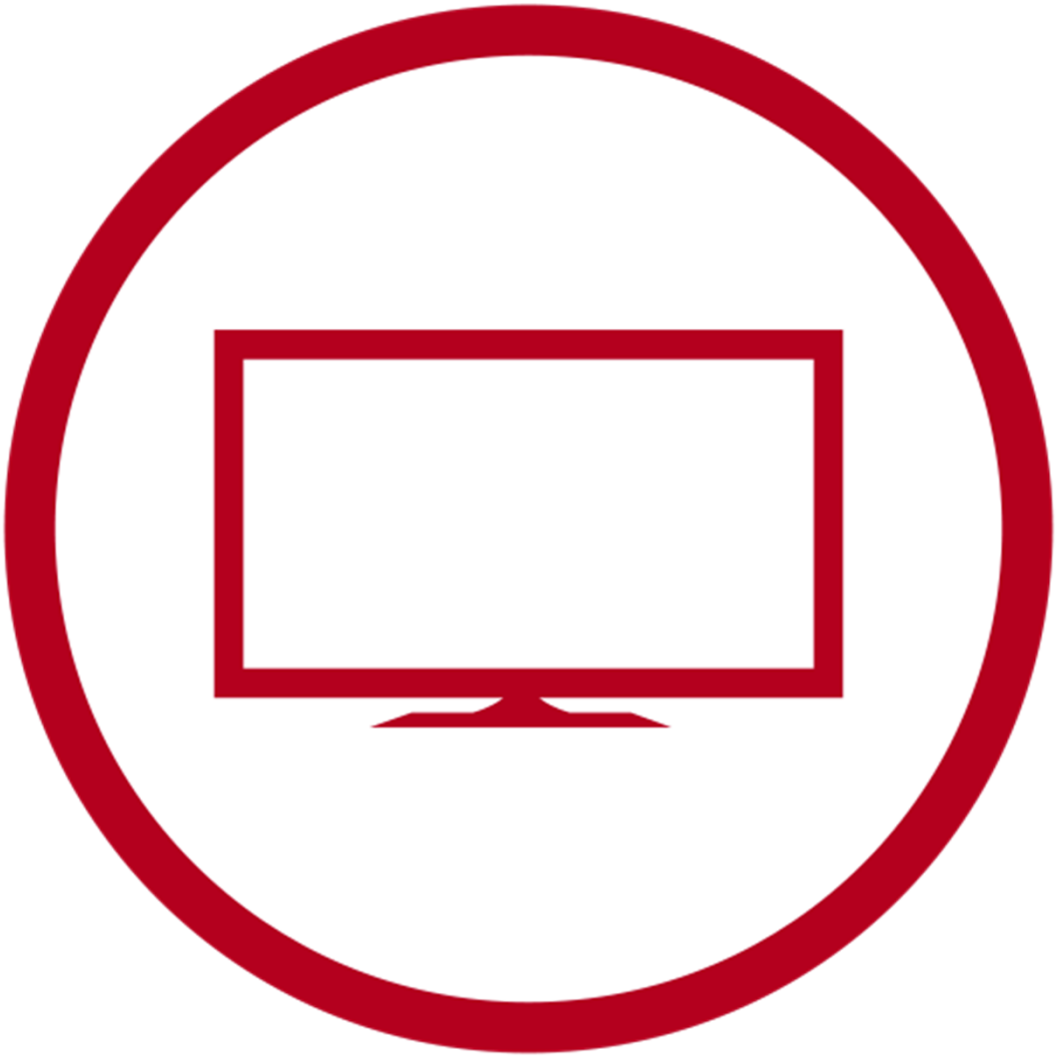
Analysis

- Analysis of video material (incl. audio material)
- Eye-tracking analysis (eye movement with pupil eye tracker)
- Day-after interview (CATI)



USERS DO NOT SHY AWAY FROM SIMULTANEOUSLY USING MANY SCREENS

TEST PERSON P. I 26 YEARS I 54% ATTENTION TO DIGITAL SCREENS

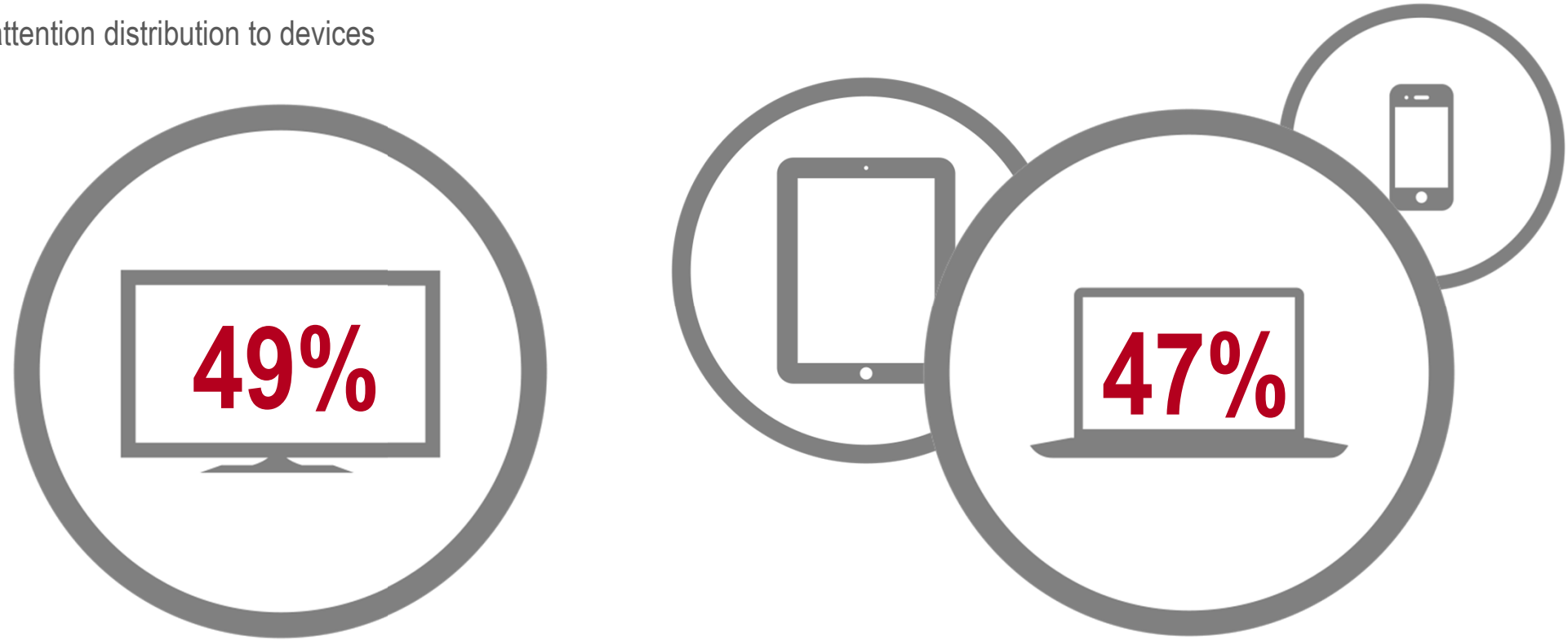


What happens during an evening when the TV is on?

How much attention does each screen get?

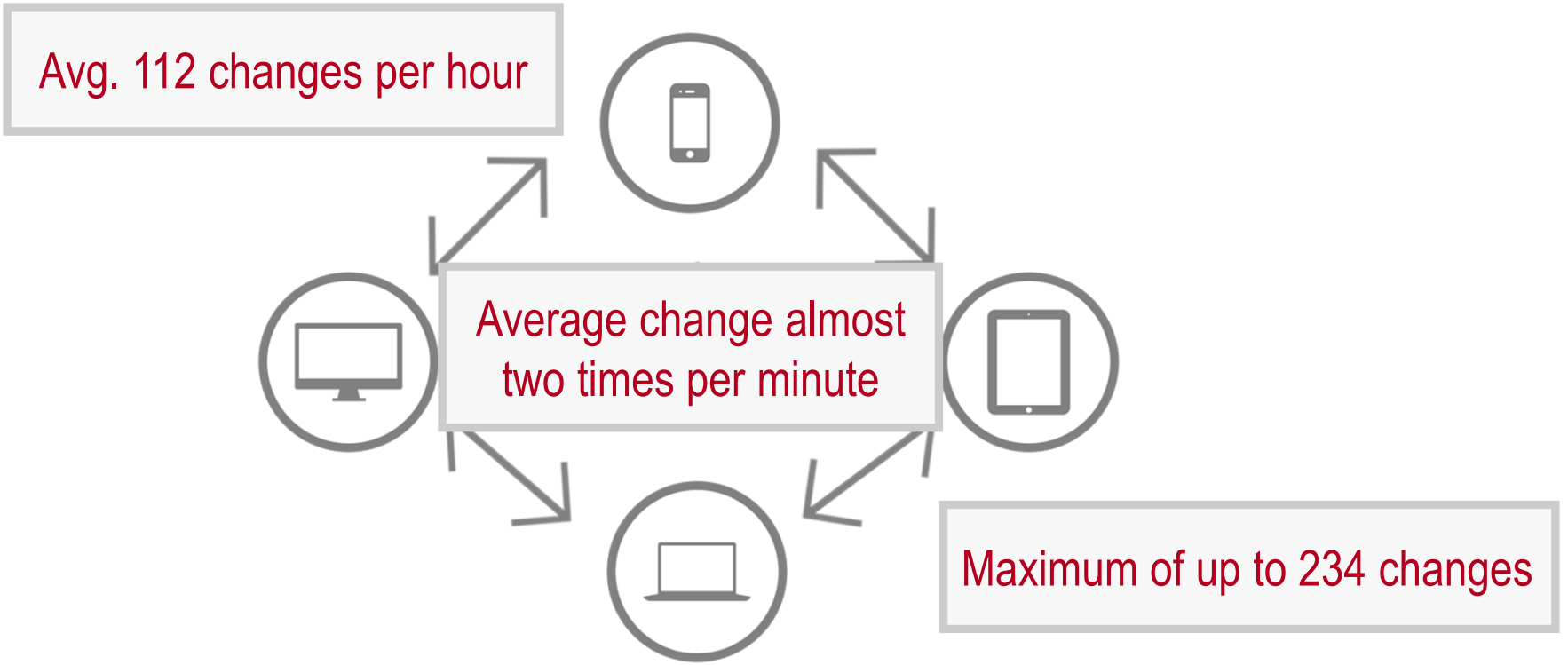
Almost Half Of The Attention Is Dedicated To Digital Contents

Avg. attention distribution to devices



Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

Attention Is Heavily Fragmented In Multi-Screen Mode



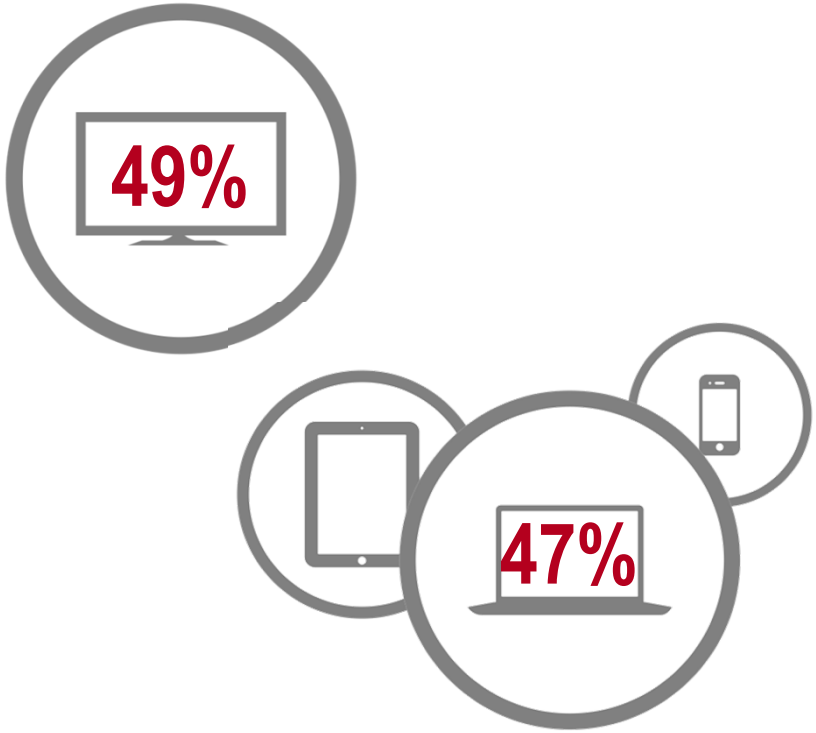
Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

What happens when advertising runs on TV?

How much attention does each screen get?

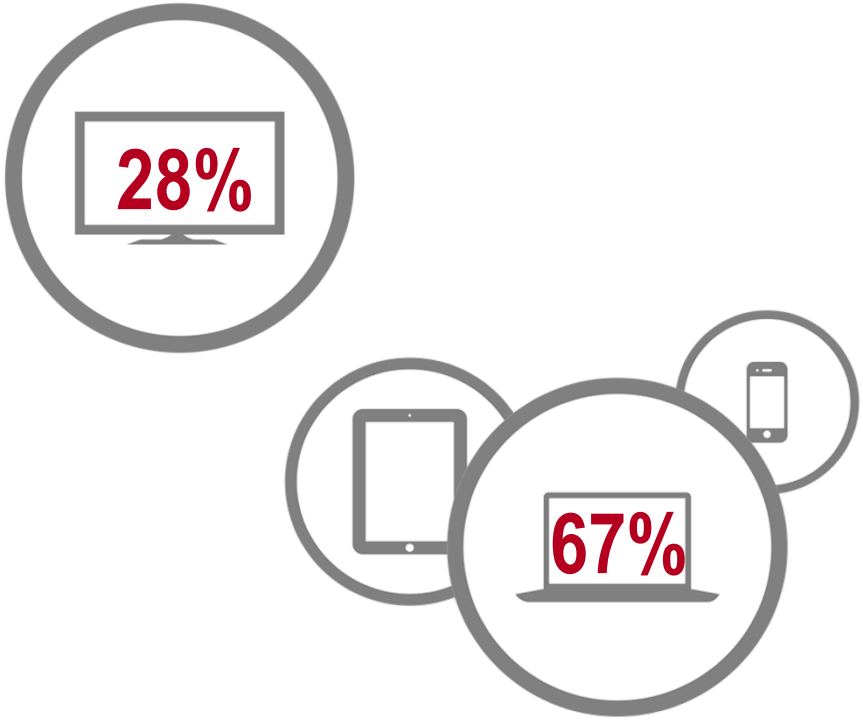
Significantly More Intensive Use Of Digital Screens During Commercial Breaks

Avg. distribution of attention to total devices



Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

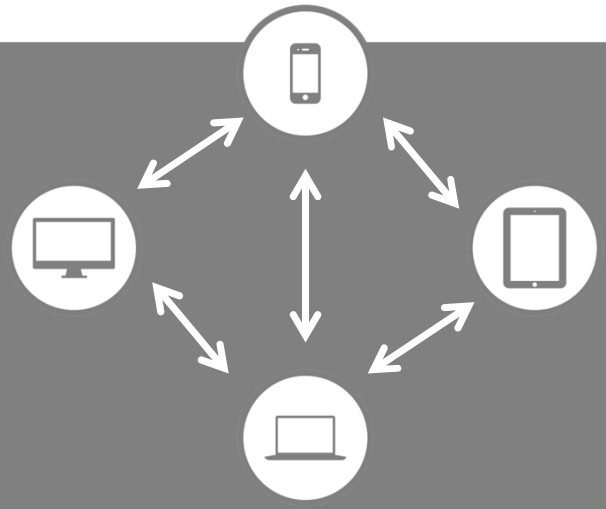
Avg. distribution of attention to devices during TV commercial break



Changes Between Devices Almost 3 Times As High During TV Ads

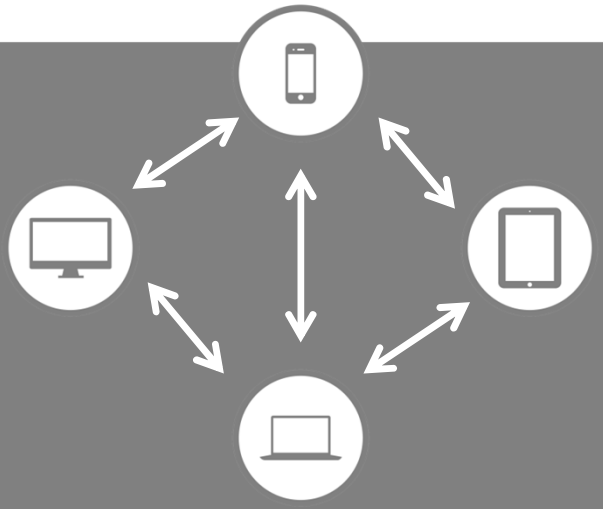
TV content

Avg. 1.5
changes per minute



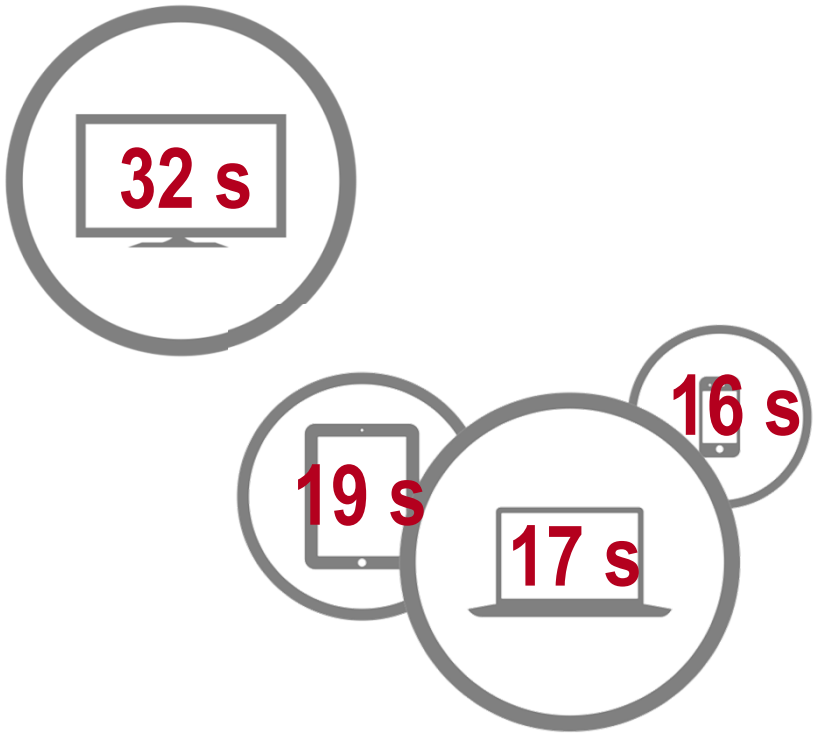
TV commercial break

Avg. 4.1
changes per minute



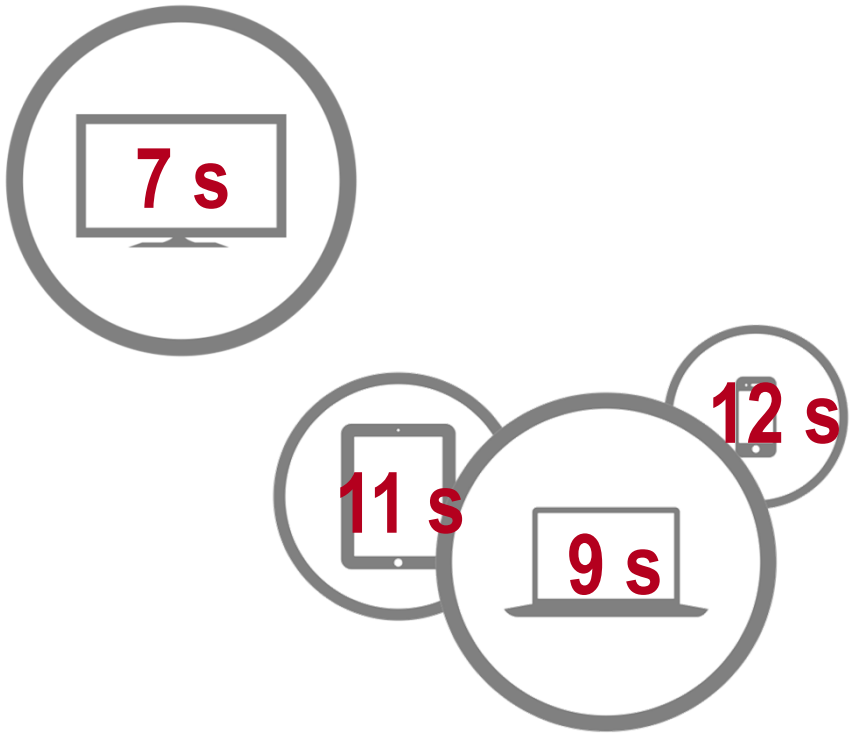
Use Time Per Use Is Shorter Overall During TV Commercial Break

Mean use time (per use) total



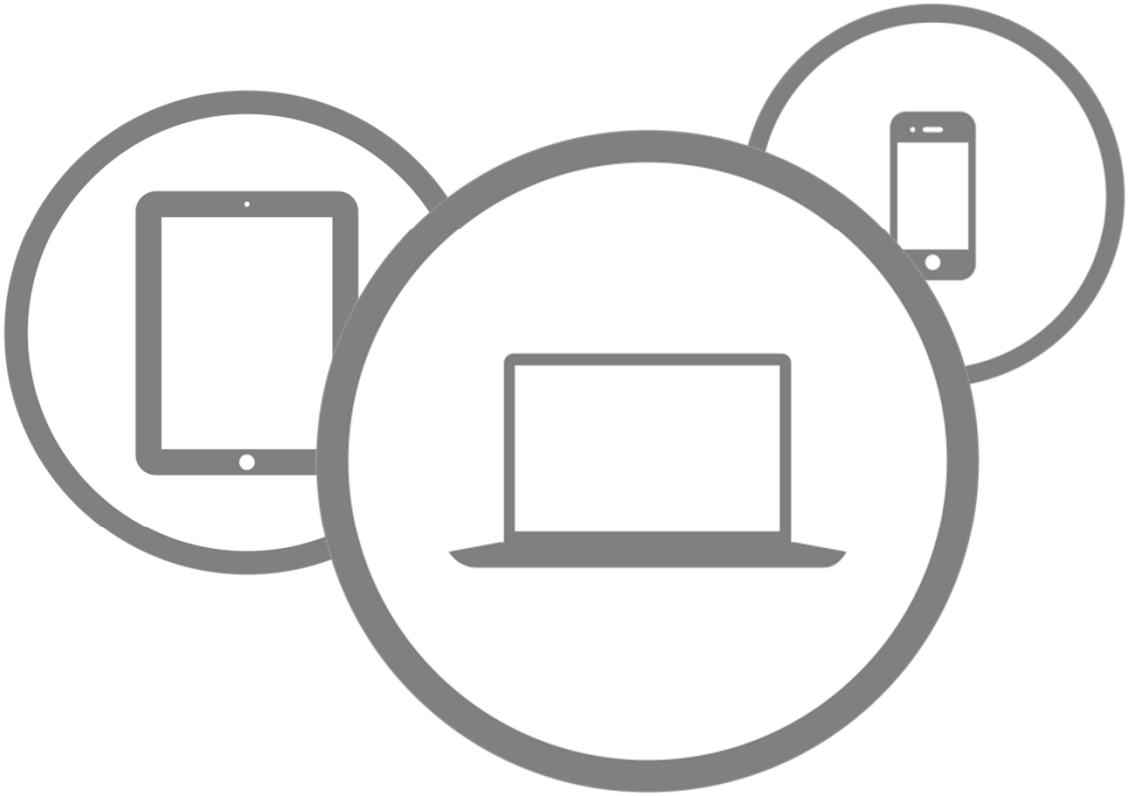
Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

Mean use time (per use) during TV commercial break



Significantly More Advertising Contacts On TV Than On Digital Screens

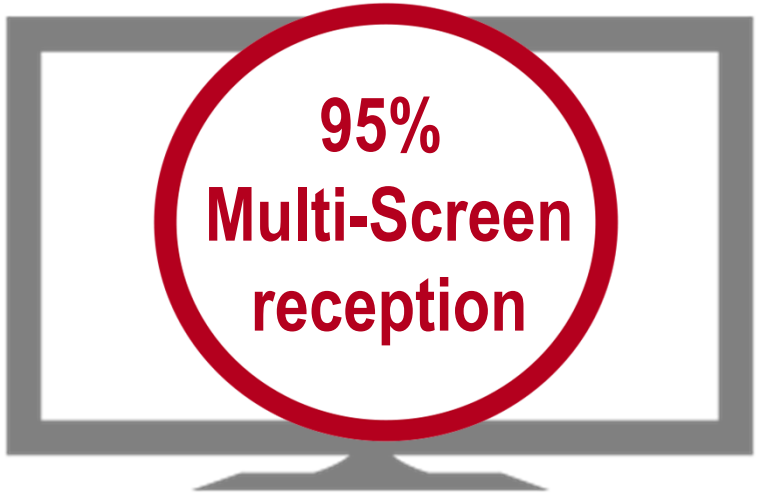
625 contacts



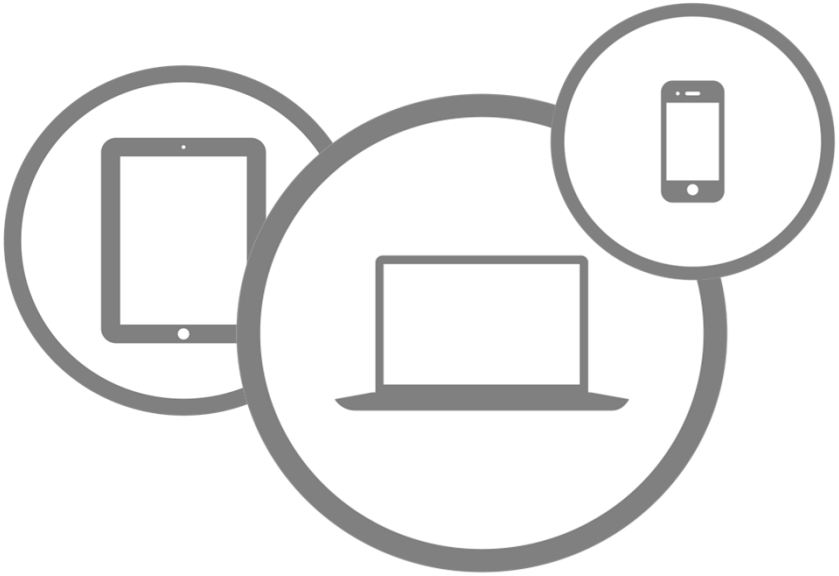
136 contacts

Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

Hardly Any TV Contacts Occur During Mono-Screen Situation



5% exclusive viewing of TV screen during presentation of advertising (Mono-Screen reception)



Use of additional screens during TV commercial break

Source: United Internet Media, Ethnographic User Study by eye square, 2014, n = 20

N = 625 TV advertising contacts

Good Advertising Recall For Digital Devices

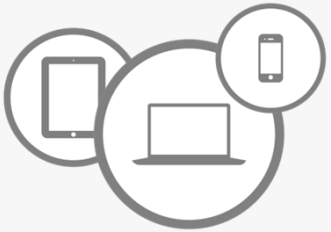
TV

Total:
625 advertising contacts

Per person:
31 advertising contacts

Recalled from this:
10 brands
≙ every 3rd brand
Basis: contacts per person

Online



Total:
136 advertising contacts

Per person:
7 advertising contacts

Recalled from this:
3 brands
≙ every 2nd brand
Basis: contacts per person

ALTHOUGH THERE IS SIGNIFICANTLY MORE TV ADVERTISING, THE MEDIA USER CAN REMEMBER THREE ONLINE ADVERTISING CONTACTS ON THE NEXT DAY.

N = 20; TV: N = 625; Online: N = 136

Conclusions

Multi-Screen is practised media use reality, which has been proven again on the basis of measurement data. About half of the attention is paid to TV and online.

Media use is heavily frequented in Multi-Screen mode. The gaze switches approx. two times per minute between the different devices.

Higher online use during TV advertising. With the start of the TV commercial break, users increasingly switch to digital devices.

There are (almost) no TV advertising contacts without Multi-Screen use: 95% Multi-Screen reception for TV; 5% exclusive viewing of the TV screen during the presentation of advertising.

Thank You For Your Attention!

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