IAB

Media Multitaskers and Purchase Influence

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IAB Research Analysis of Prosper Insight Data

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Methodology

IAB conducted a custom analysis of syndicated Prosper Insight data to look at consumer and media behaviors of 'Media Multitaskers', or those who regularly go online while watching TV as compared to the general Adult 18 and over population in the US. Regularly is defined as "routinely, as a set pattern; occasionally means no set pattern, as mood suits." The report is derived from the Media Behaviors & Influence™ (MBI) Study (Jan 2014) of 15,410 respondents surveyed online. The study has a margin of error of less than 1%, at a 99% confidence level. Two percentage points is statistically significant at 99% confidence level.

Sample Sizes

- **Prosper Insights & Analytics Media Behaviors & Influence Annual Survey**
  - **15,410 Adults 18+** representative of the general US population
  - **6,074 Media Multitaskers, Adults 18+** who regularly go online while watching TV

About ProsperInsight™

ProsperInsight delivers customized timely market intelligence from various sources through its cloud-based technology-driven Integrated Solutions Platform. Solutions are delivered on multiple devices (PC/Tablet/Smartphone) though the InsightCenter™ tool using diverse information sources relevant to clients' business needs. www.GoProsper.com.

Executive Summary

- **Media Multitaskers:** It is commonly reported that TV viewers are increasingly using digital media simultaneously but what is not known is whether advertising on either media gets their attention. This study shows that TV and digital ads do break through and even influence the online searches and purchases of these media multitaskers.
- **82% of US Adults Go Online While Watching TV and Nearly Half of Them Do So Regularly:** This number has grown over the years, especially among 18-34 year olds, where TV and online Multitasking is becoming the norm. Media Multitaskers are more likely to be young, single, females who are heavy media users, especially of digital media. Within digital, they're also heavier Video Streamers and users of Social Media and Mobile. Media Multitaskers are most likely to watch TV and go online during primetime.
- **Media Multitaskers are Active on Both Screens During Primetime**: Media Multitaskers are most active online during primetime TV viewing hours (8-11pm). Since they're watching TV and online and are influenced by both, primetime TV may be a good time for an integrated campaign (to hit them with a TV commercial that they can search about online, where they'll encounter a digital ad).
- **Media Multitaskers Are Reacting to What They're Seeing**: Both digital ads and TV trigger Media Multitaskers' online searches, which in turn influence Media Multitaskers' purchases more than the general population. They're more likely to be influenced by Sponsored Search results.

Executive Summary

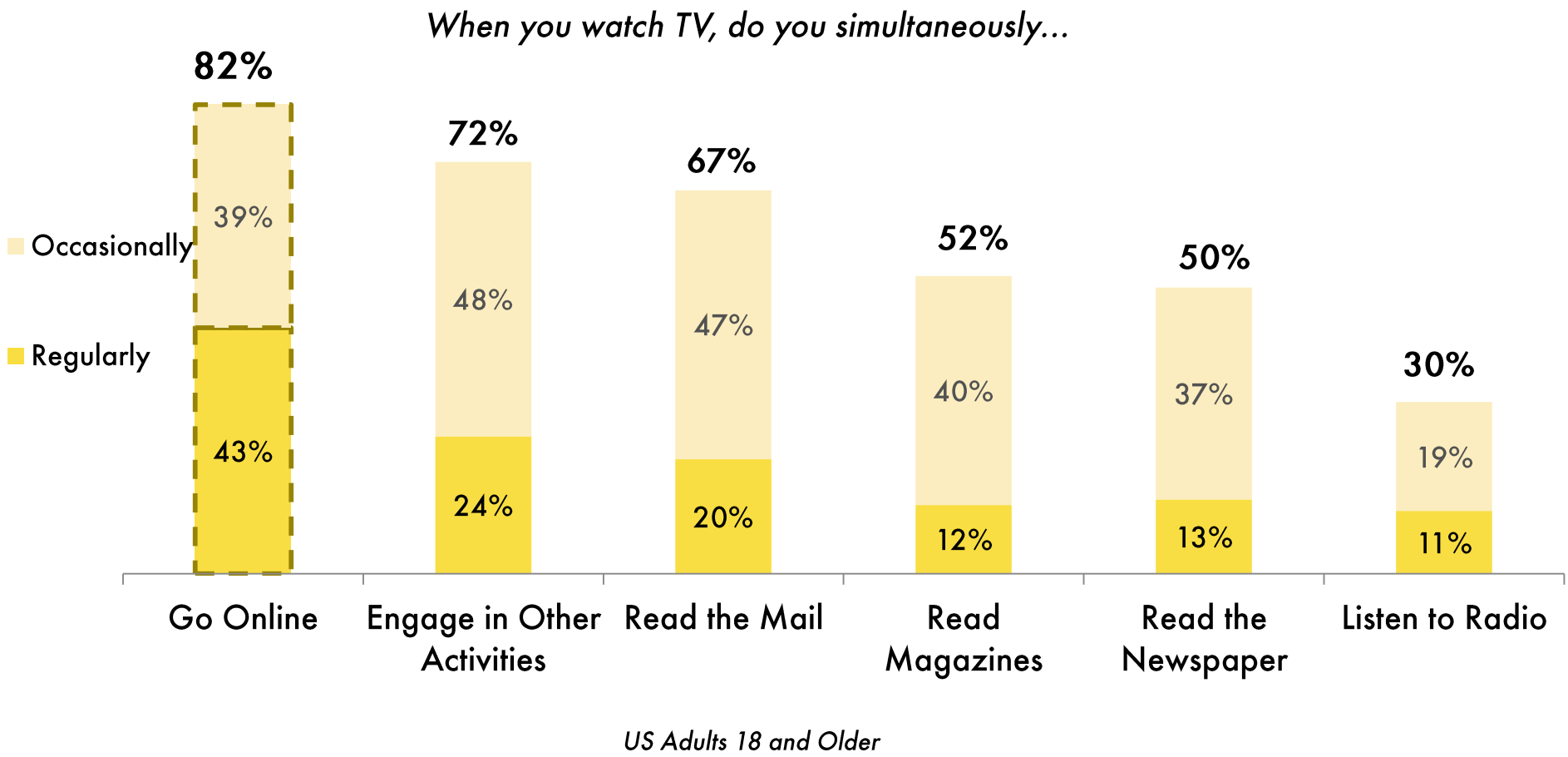
- **Despite Multiscreening, Both TV Commercials and Internet Advertising Break Through and Influence Purchases:** Media Multitaskers are more likely than the general population to report regularly watching TV commercials and Digital Video Ads. Broadcast and Cable TV are more likely to influence Media Multitaskers' purchases than those of the general population. Internet advertising is even more likely to influence Media Multitaskers' purchases (especially Electronics, Clothing and Dining) than it does the general population. Other stronger purchase influences include Email Advertising, Social Media and Mobile.

- **Media Multitaskers' #1 Activity is Shopping Online:** They're also more likely to do product research online before making a purchase. Media Multitaskers are also more likely than the general population to be planning major purchases in the next 6 mos. How will you reach them?

Media Multitasking Trends

The Most Popular Simultaneous Activity While Watching TV is to Go Online

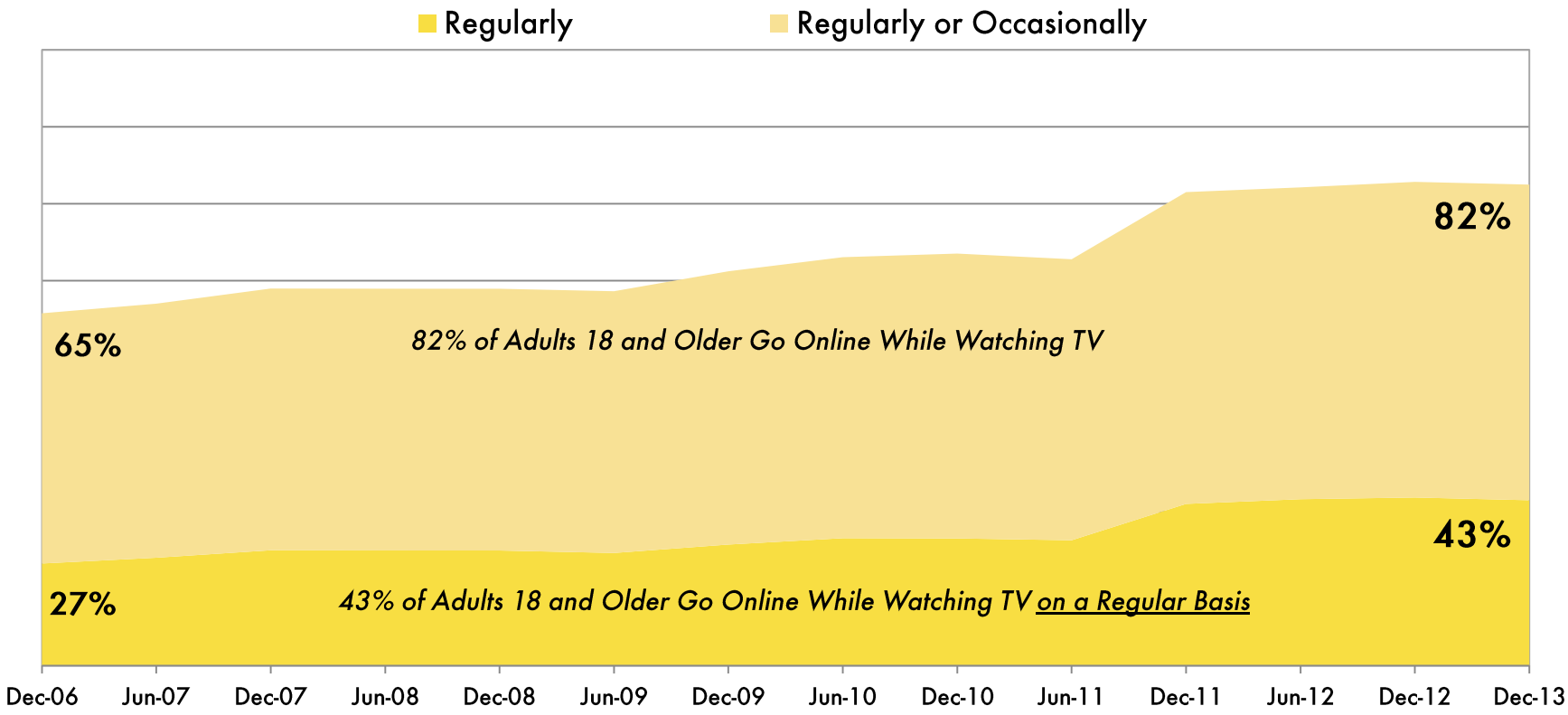
- **82% of US Adults Go Online While They Are Watching TV at Least Sometimes**



US Adults 18 and Older

Surfing While Watching TV is Growing

When you watch TV do you simultaneously go online?

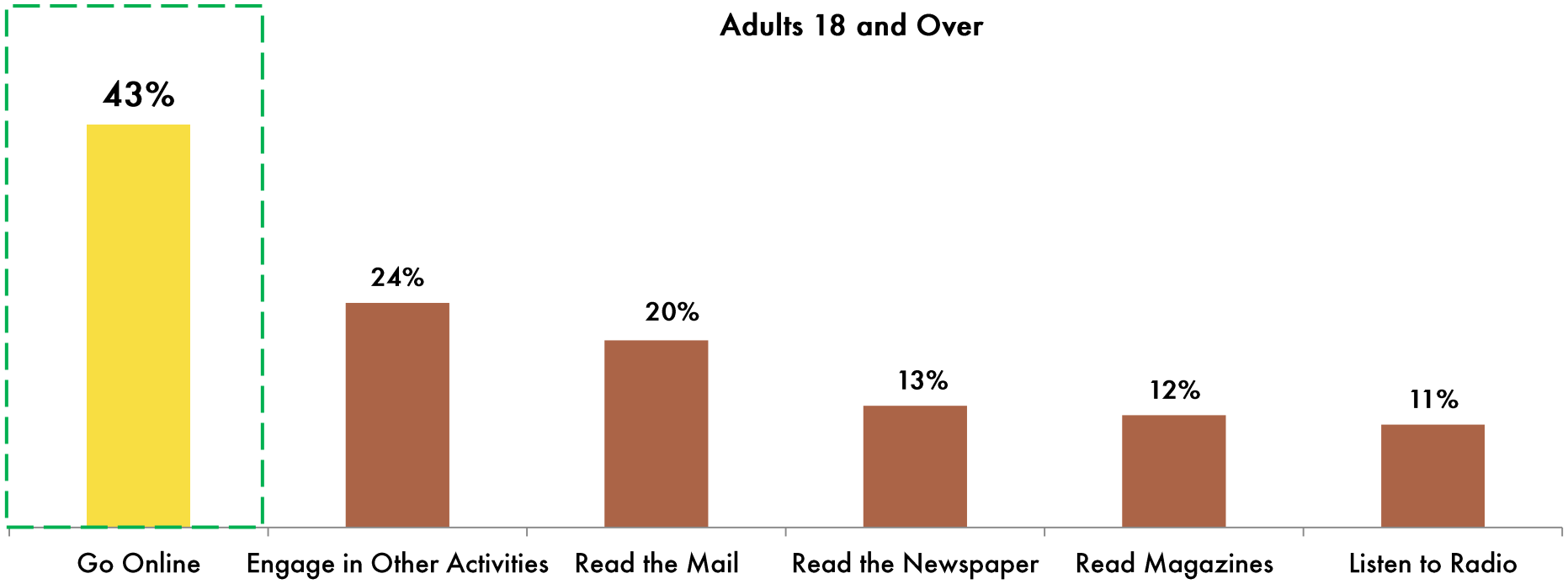


Media Multitaskers are Adults 18 and older who regularly go online while watching TV. N = 15,410 A18+, N = 6,074 Media Multitaskers

Nearly Half of US Adults Regularly Go Online While Watching TV

- **These 'Media Multitaskers' are the focus of this report**

When you watch TV, do you simultaneously… (Regularly)



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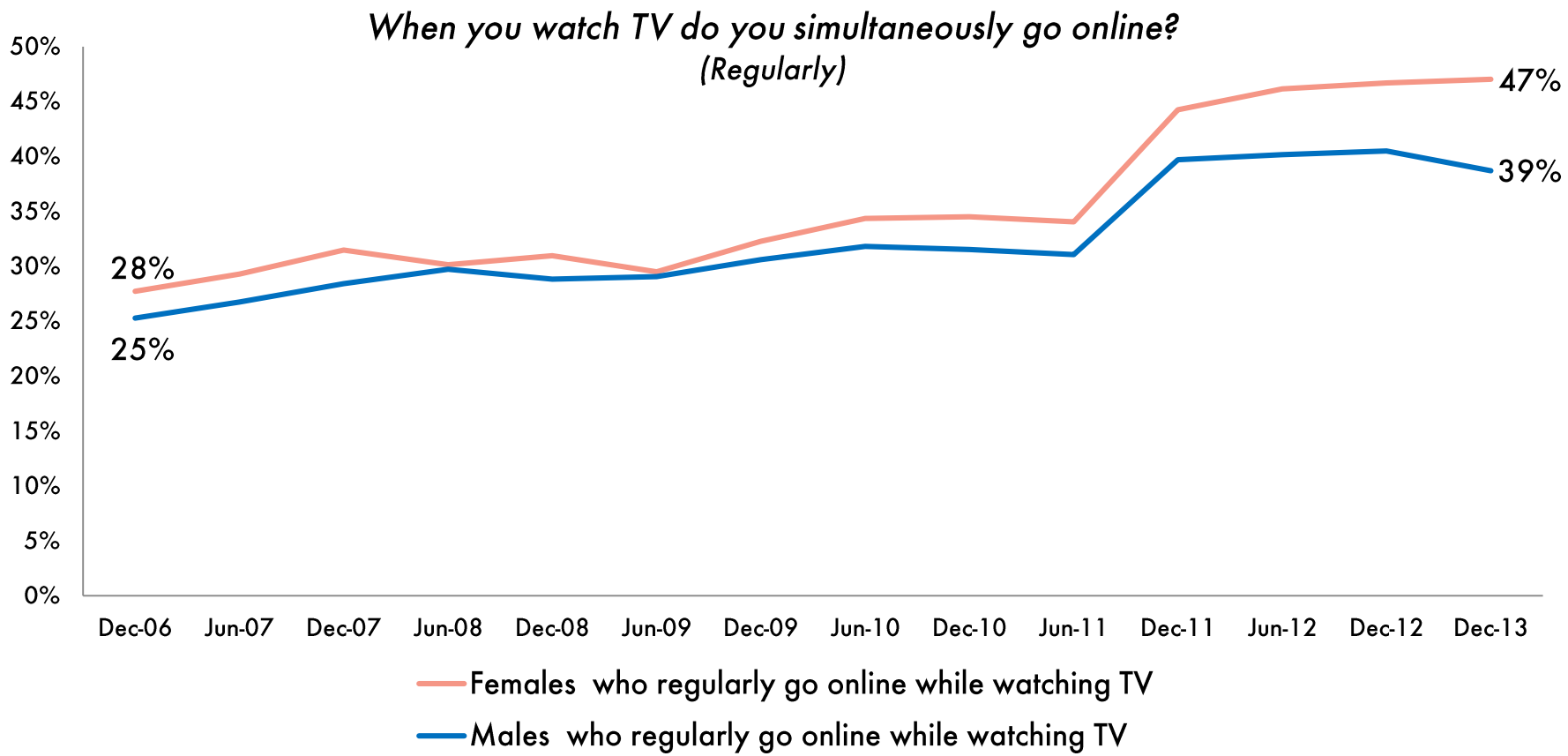
Women are Increasingly More Likely to Go Online While Watching TV

- Nearly Half of Women 18 and Older Regularly Go Online While Watching TV



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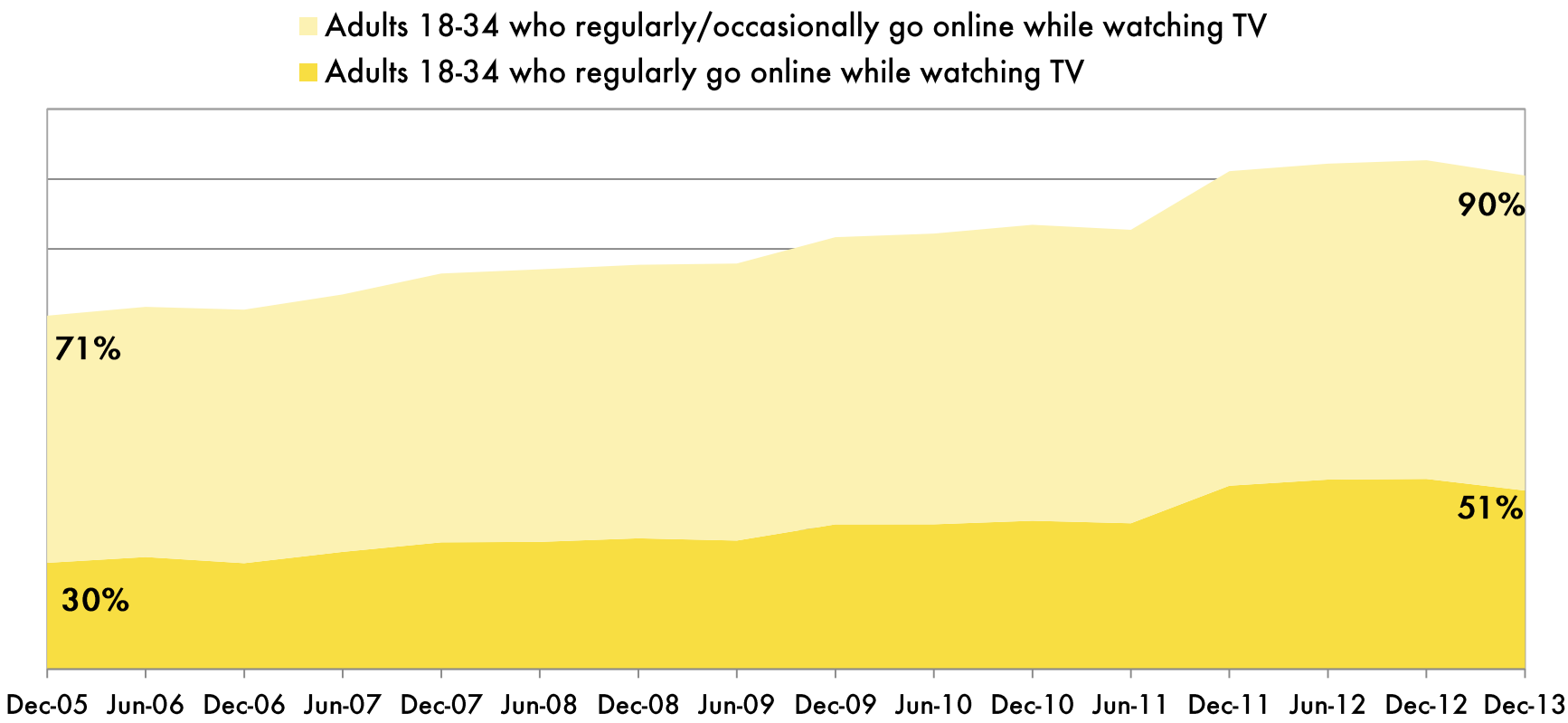
TV and Online Multitasking is Becoming the Norm for Younger Consumers

- Nearly all 18-34 year olds go online regularly or occasionally while watching TV
- More than half do so regularly

When you watch TV do you simultaneously go online?



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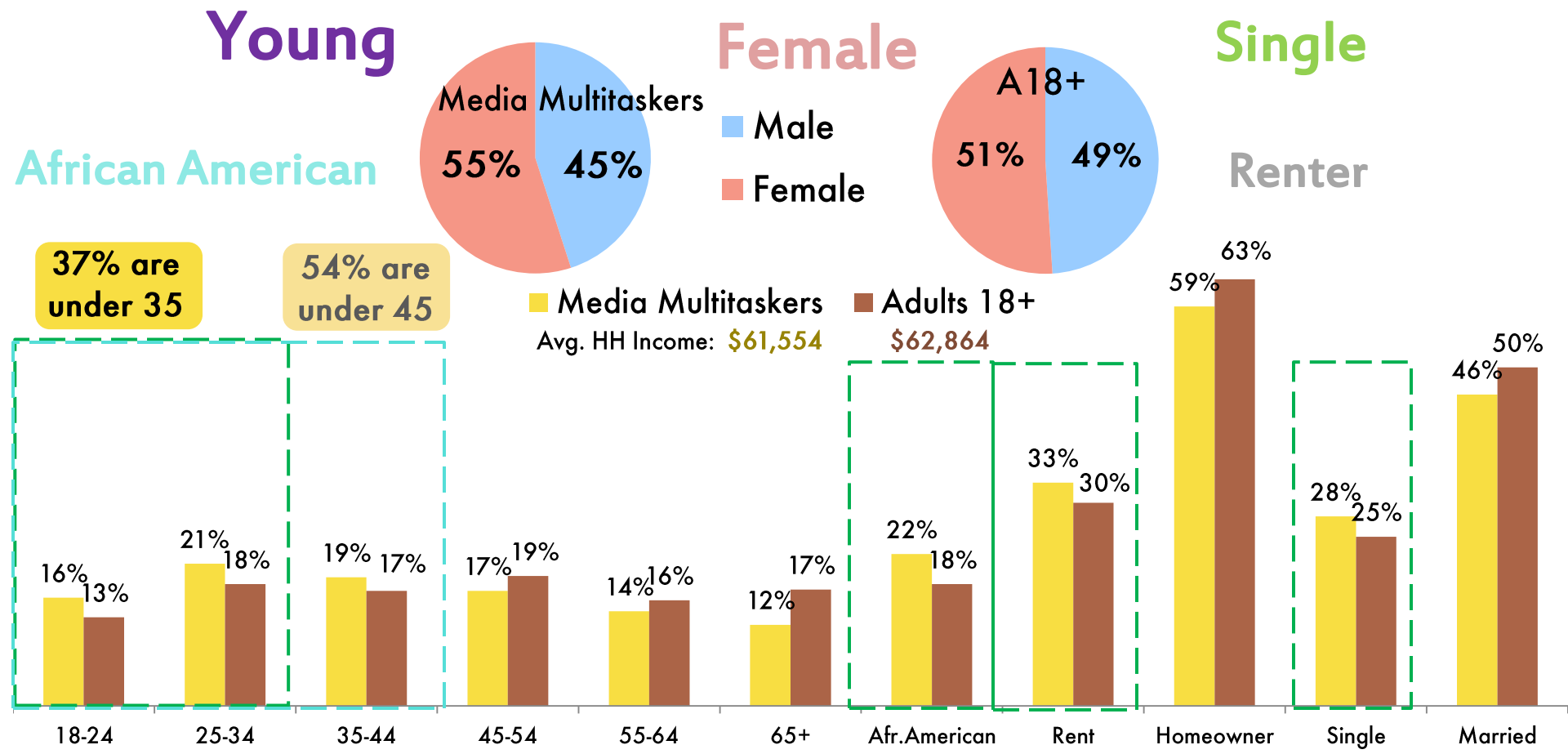
Who Are Media Multitaskers?

Who are TV and Online 'Media Multitaskers'?



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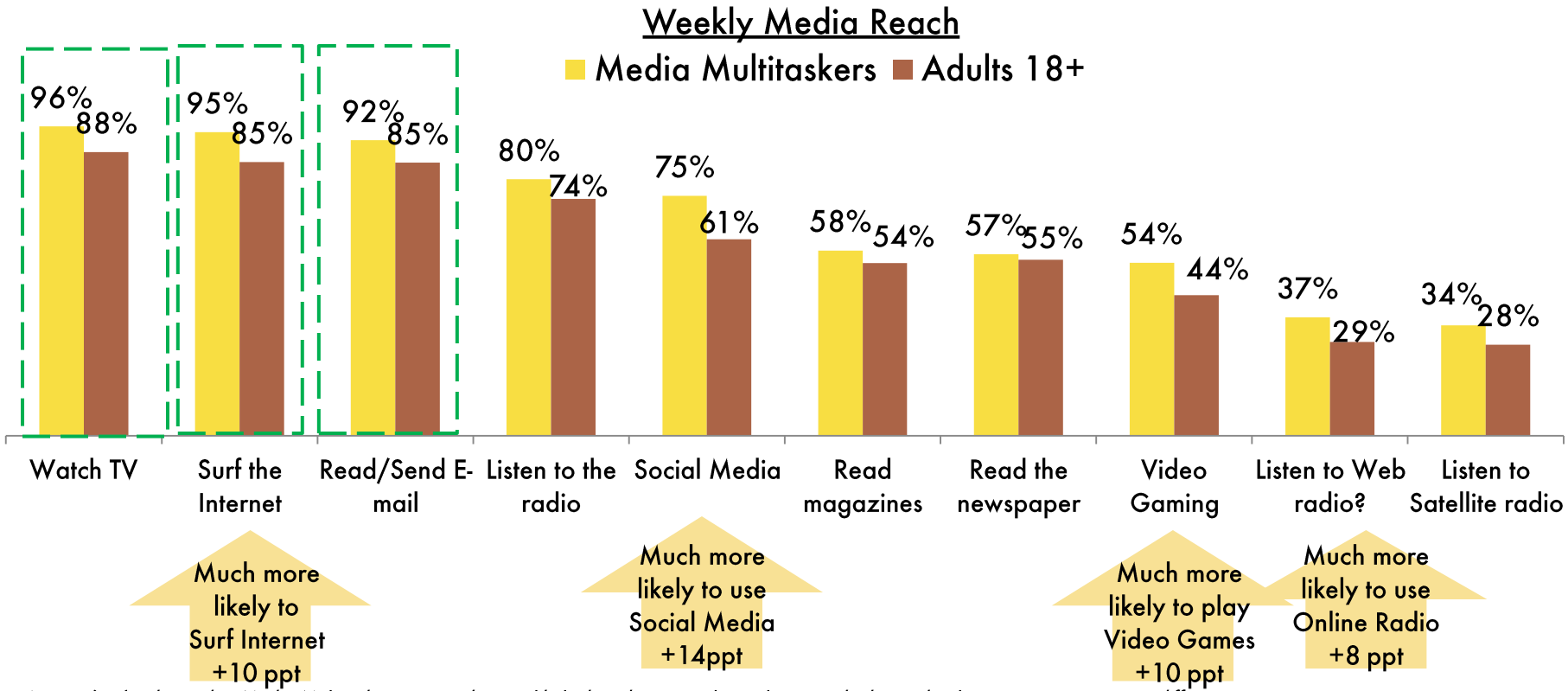
Media Multitaskers Use All Media More, Especially Digital

- **Nearly all watch TV, surf the internet and check email**
- **Media Multitaskers are much more likely than the general population to use digital media like Internet, Email, Social Media, Stream Radio**

During an average WEEK (MONDAY-SUNDAY), do you...?



Arrows (ppt) indicate that Media Multitaskers are much more likely than the general population to do this, with a larger percentage point difference.

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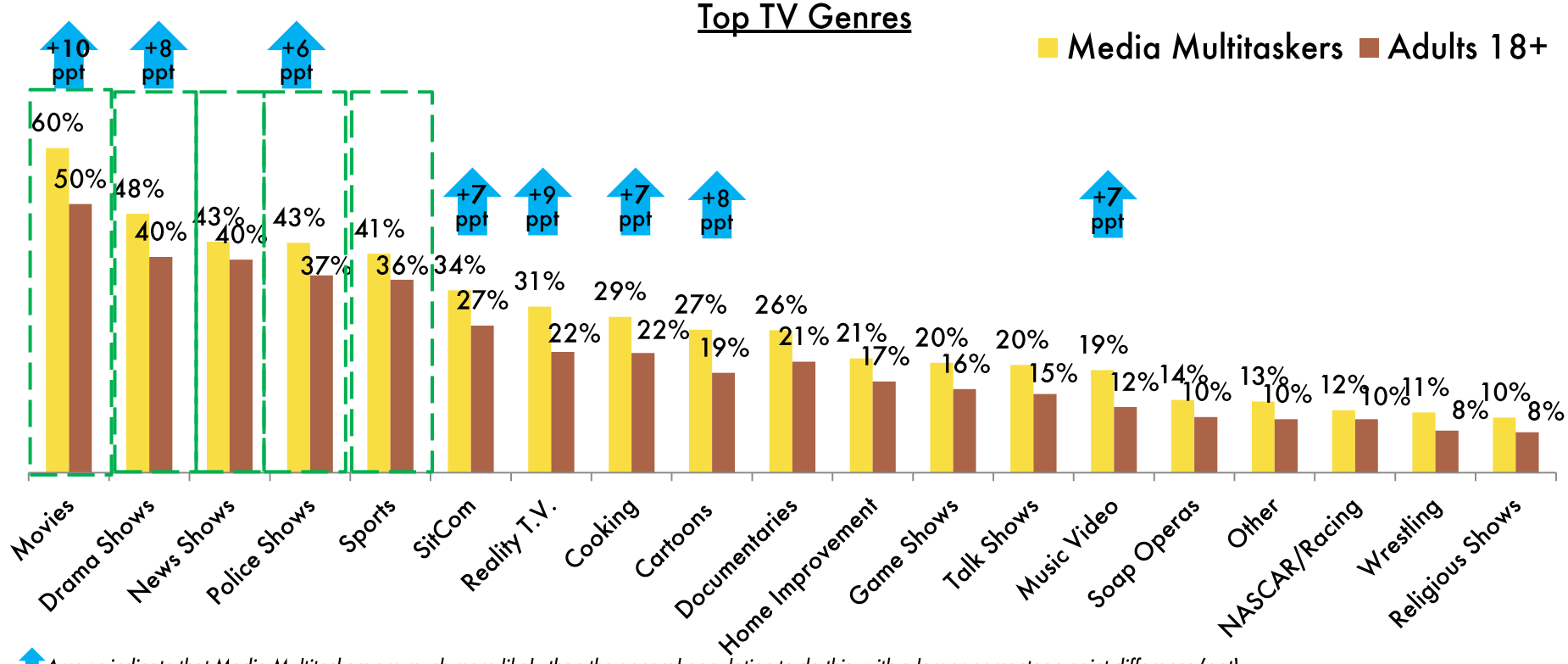
Media Multitaskers Regularly Watch More TV Genres Than the General Population

- **Top TV genres watched are Movies, Drama, News, Police and Sports**
- **Media Multitaskers are much more likely to watch Movies, Drama, Police, SitComs, Reality TV, Cooking, Cartoons and Music Videos**

Which type of T.V. shows do you watch? (Regularly)



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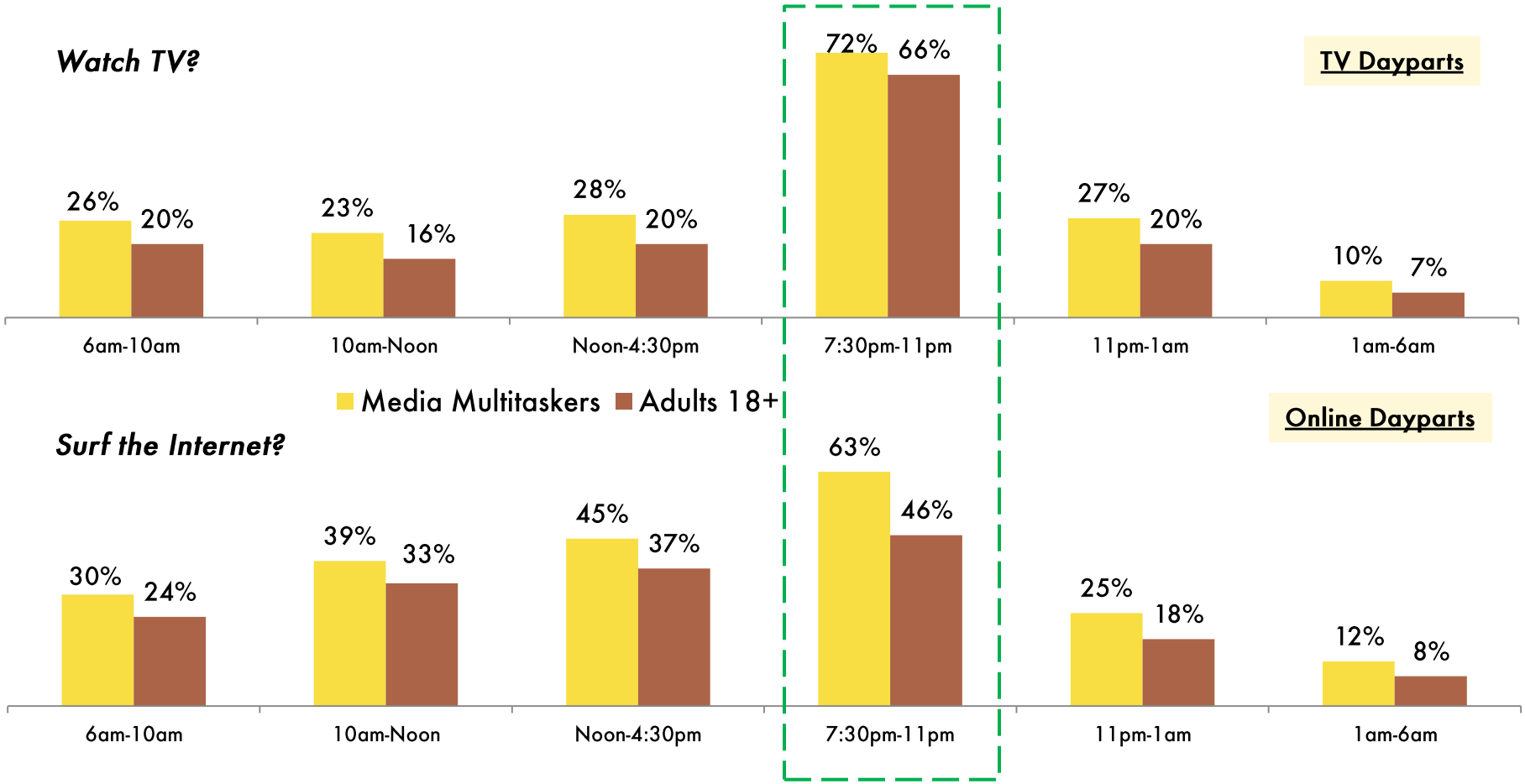
Media Multitaskers are Most Likely to Watch TV and Go Online During Primetime

On an average WEEKDAY (MONDAY-FRIDAY), during which hours do you... (Check all that apply).



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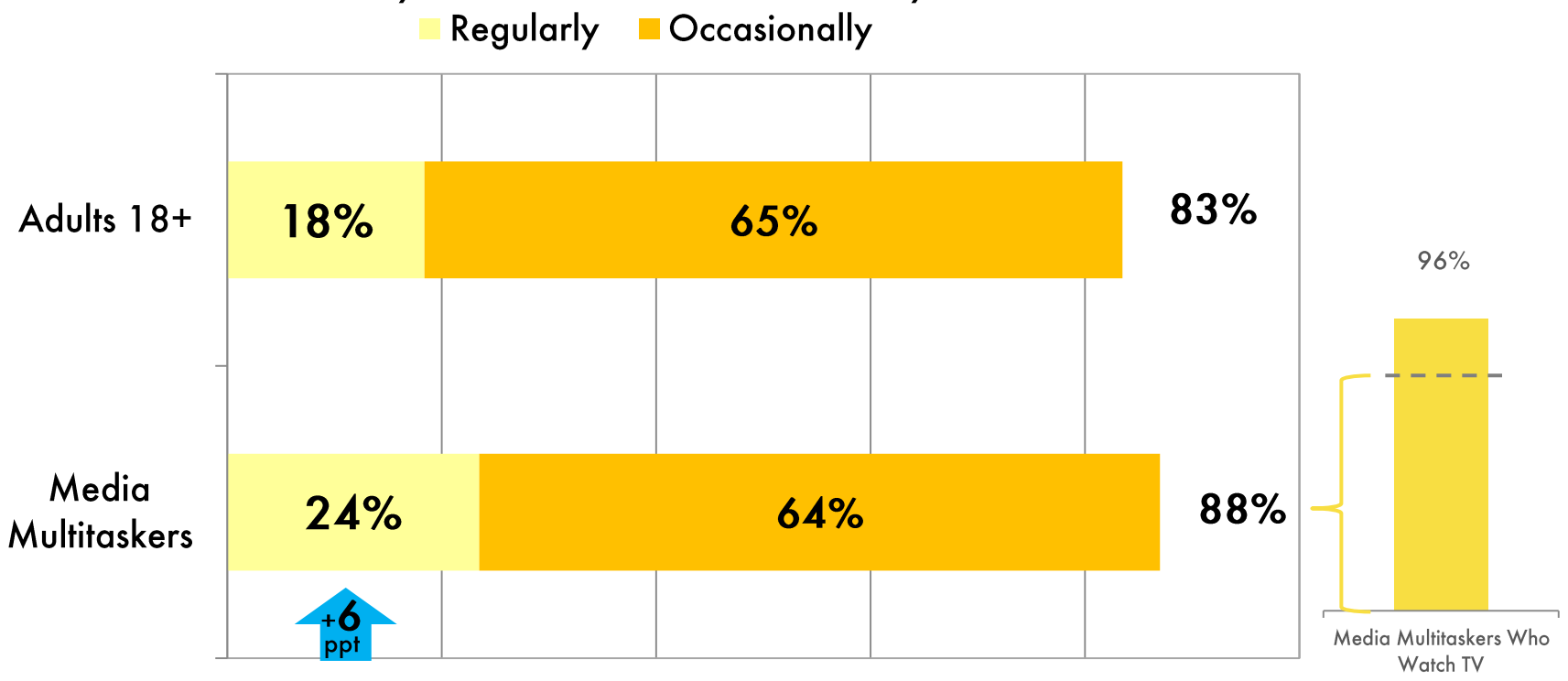
Despite Multitasking, TV Commercials Break Through

- **Media Multitaskers are just as likely as the general population to watch TV commercials**
- **And more likely to <u>regularly</u> do so**

How often do you watch commercials when they air on television?



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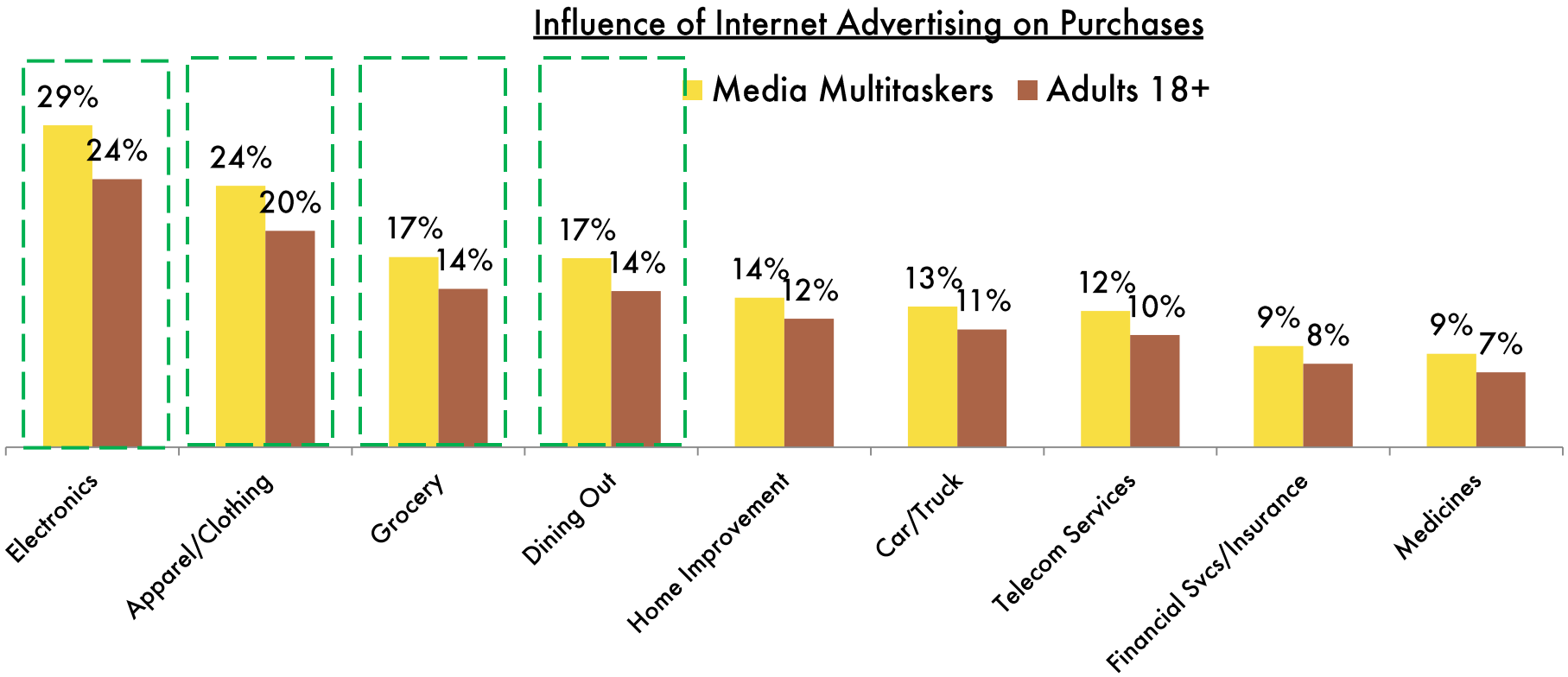
Internet Ads Influence Them

Despite Multitasking, Internet Advertising Breaks Through

- **Internet advertising is more likely to influence Media Multitaskers' purchases, especially of Electronics, Clothing, Grocery and Dining**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Internet Advertising)



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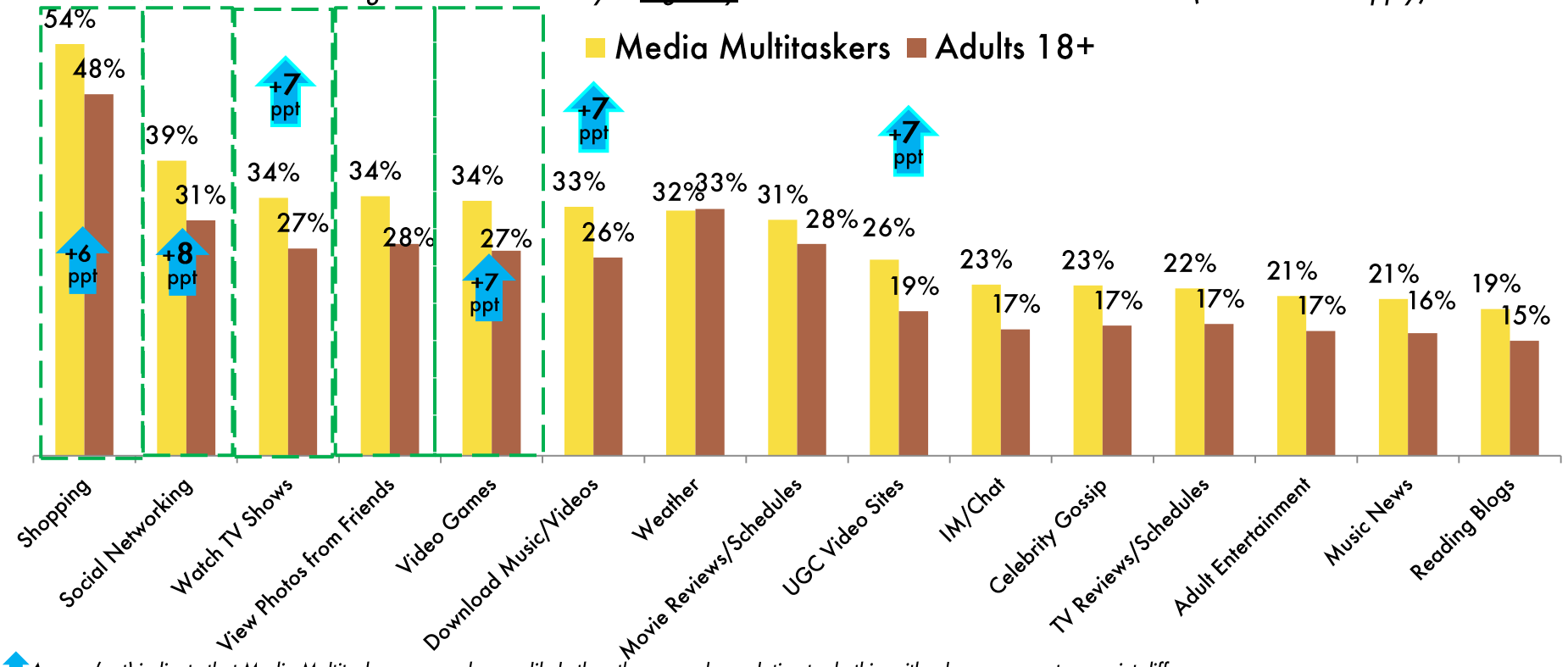
Media Multitaskers Use Digital More Than the General Population

Media Multitaskers are Heavy Digital Media Users

- **They're more likely to do <u>any</u> online activity than the general population**
- **Top online activities are online shopping, social networking and watching TV online**
- **Notably, Media Multitaskers are much more likely to do any online video activity**

Which of the following online activities do you <u>regularly</u> do for Fun & Entertainment while online? (Check all that apply)



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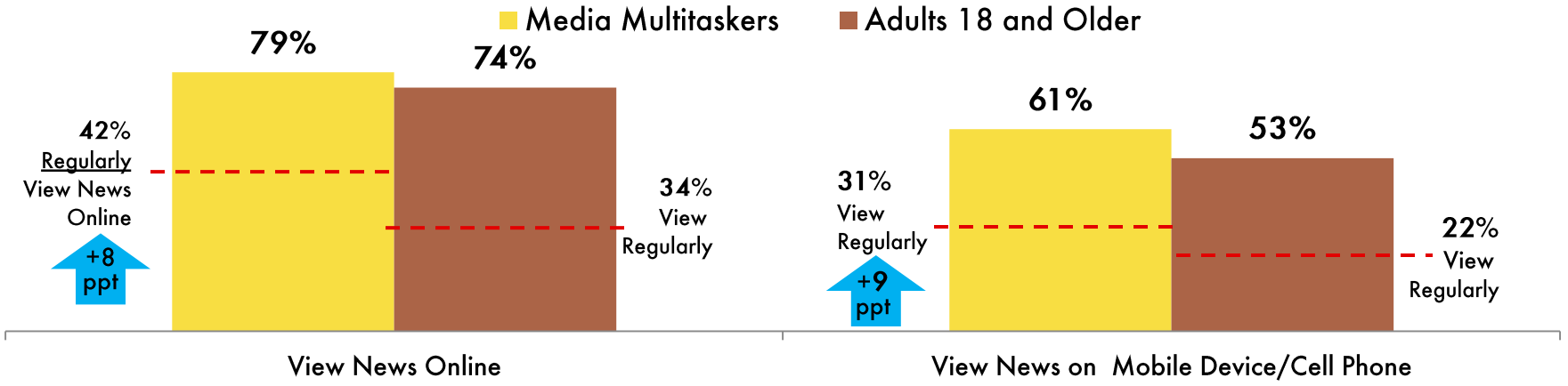
Media Multitaskers are More Likely to Get Their News and Sports Online or on Mobile

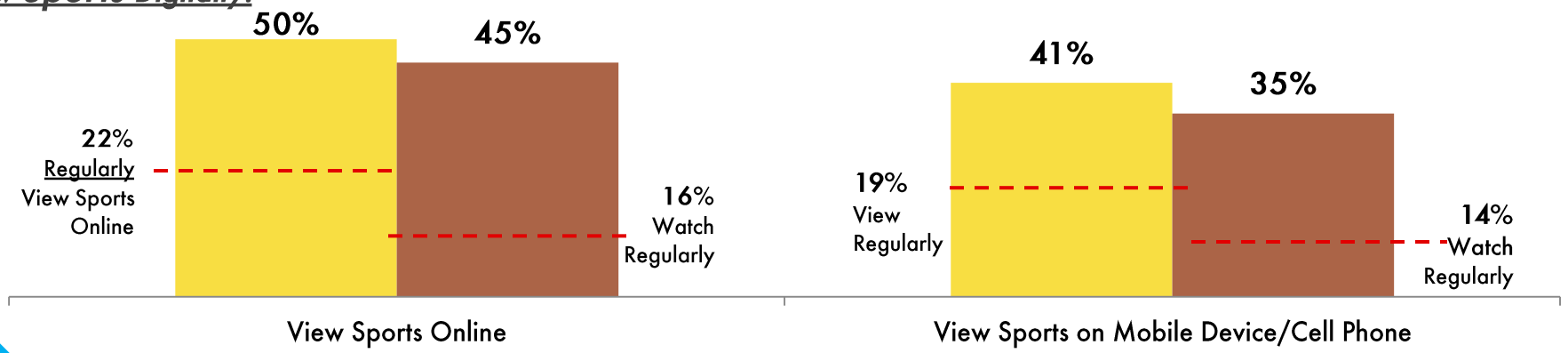
- Three in four Media Multitaskers view News online and nearly two-thirds do so on their mobile
- About half view Sports online or on their mobile device

View News Digitally:

How often do you do any of the following? (Regularly/Occasionally)



View Sports Digitally:



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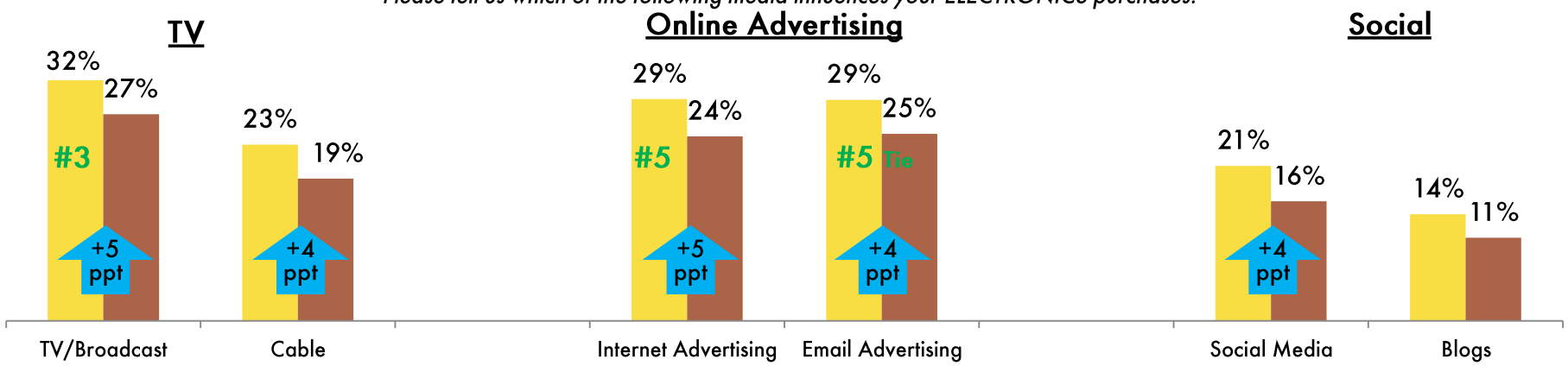
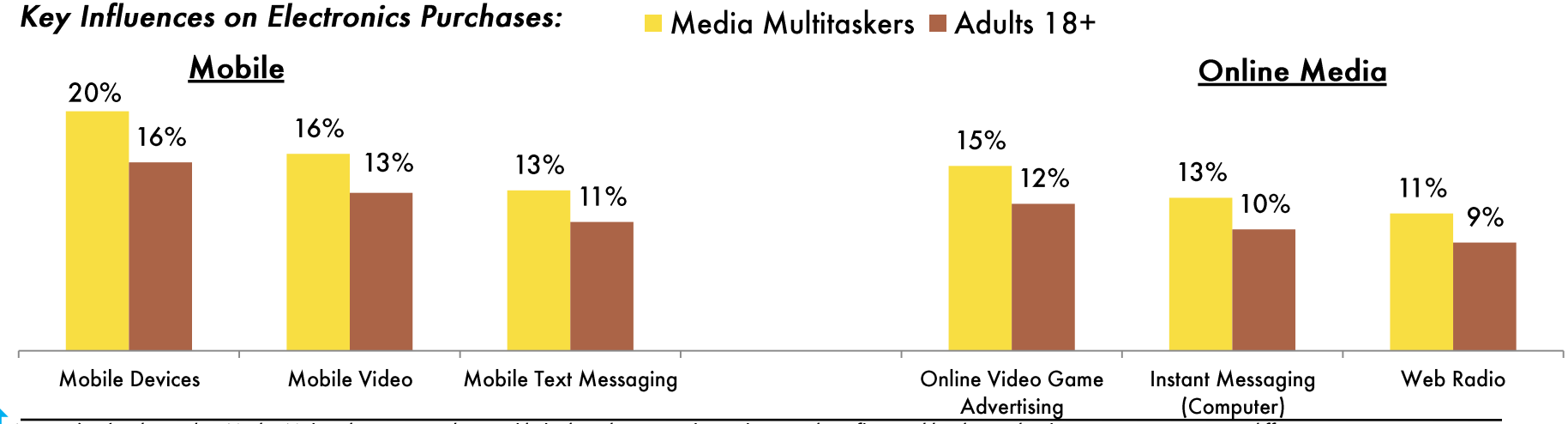
Media Multitaskers' Electronics Purchases Are More Influenced by Digital and TV

- Almost one in three Media Multitaskers are influenced by Network TV, Internet or Email Advertising in their Electronics purchases, compared to about one in four among the general population

Please tell us which of the following media influences your ELECTRONICS purchases:



Key Influences on Electronics Purchases:



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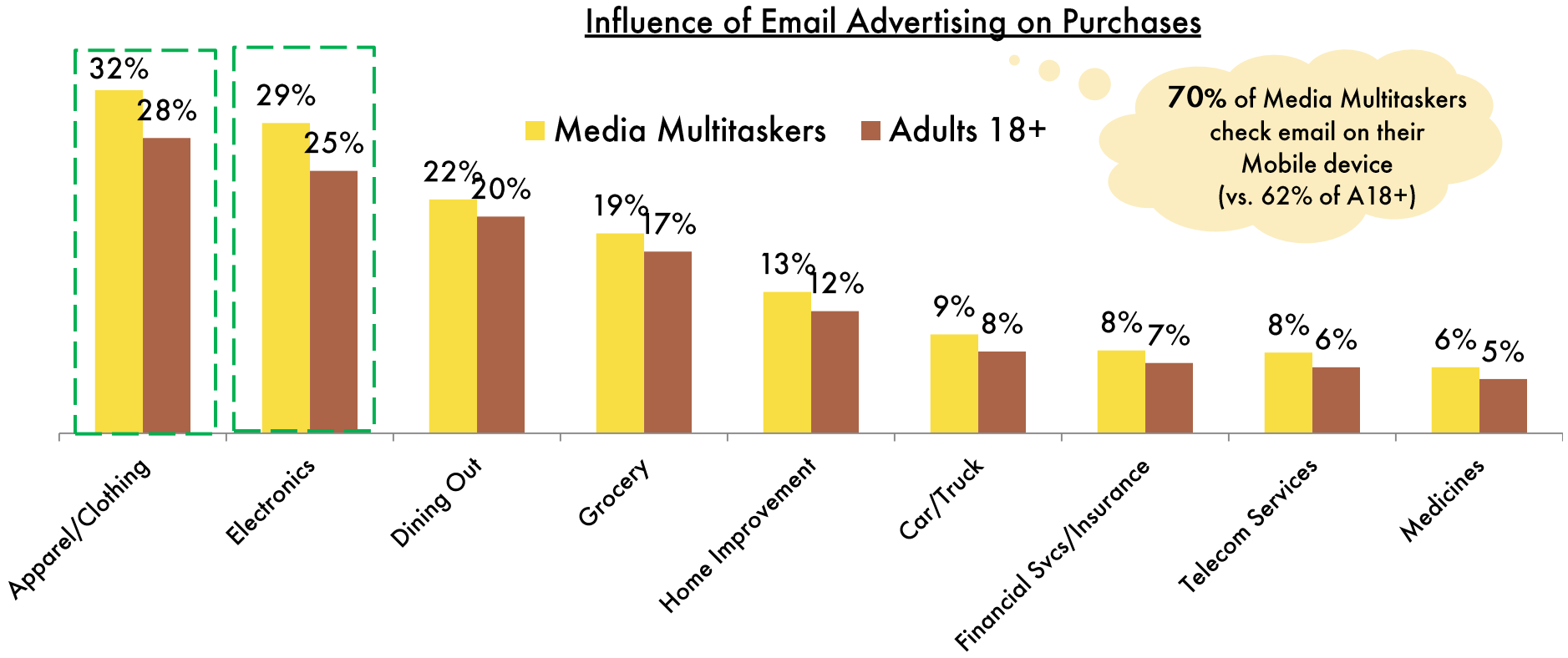
Email Also Influences Media Multitaskers' Purchases More

- **Especially Clothing and Electronics**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Email Advertising)



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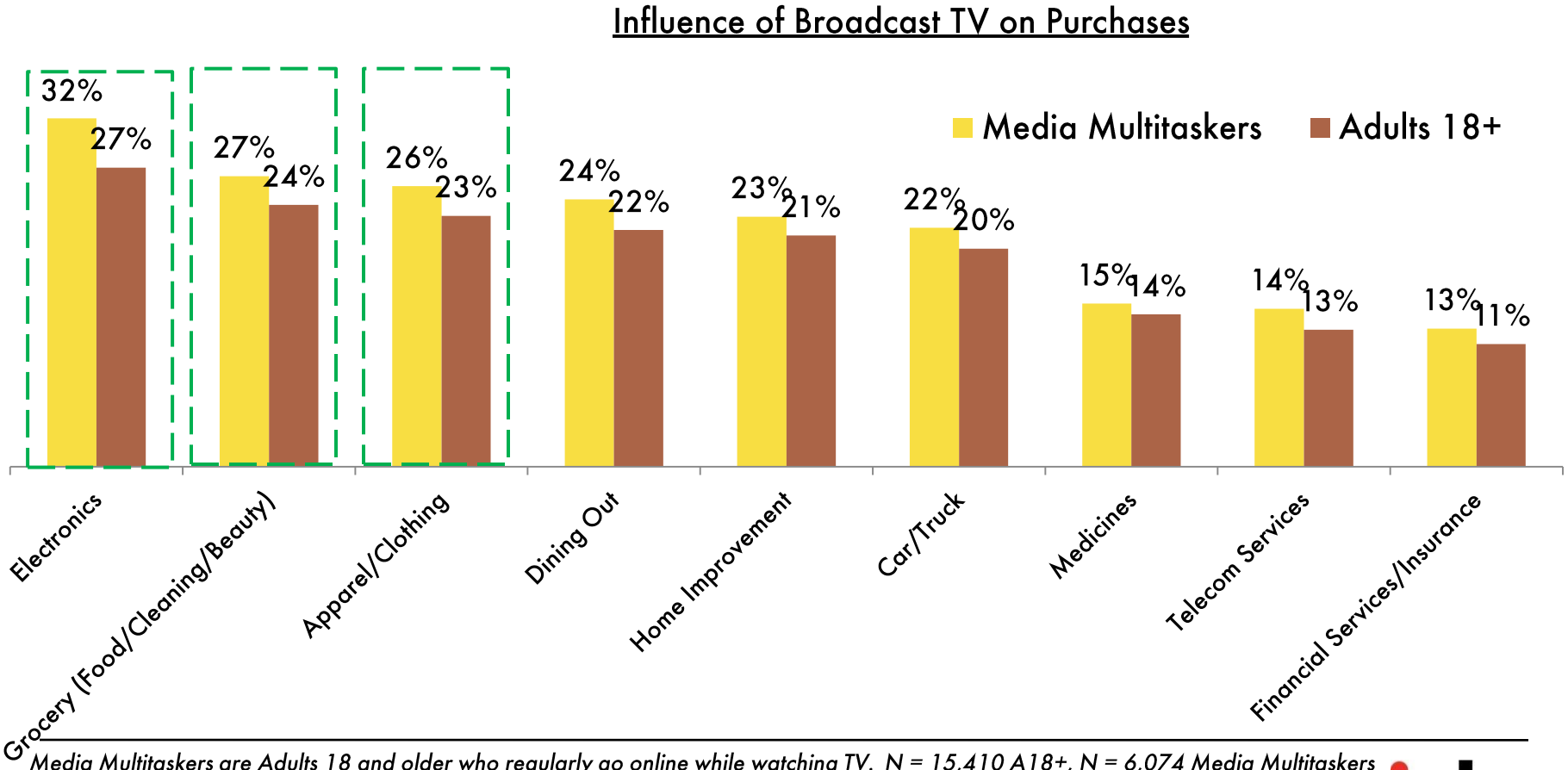
How Does TV and Digital Influence Media Multitaskers' Purchases?

They're Paying Attention:

TV Influences Media Multitaskers' Purchases More Than It Does the General Population

- **Especially Electronics, Groceries and Clothing**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Broadcast TV)



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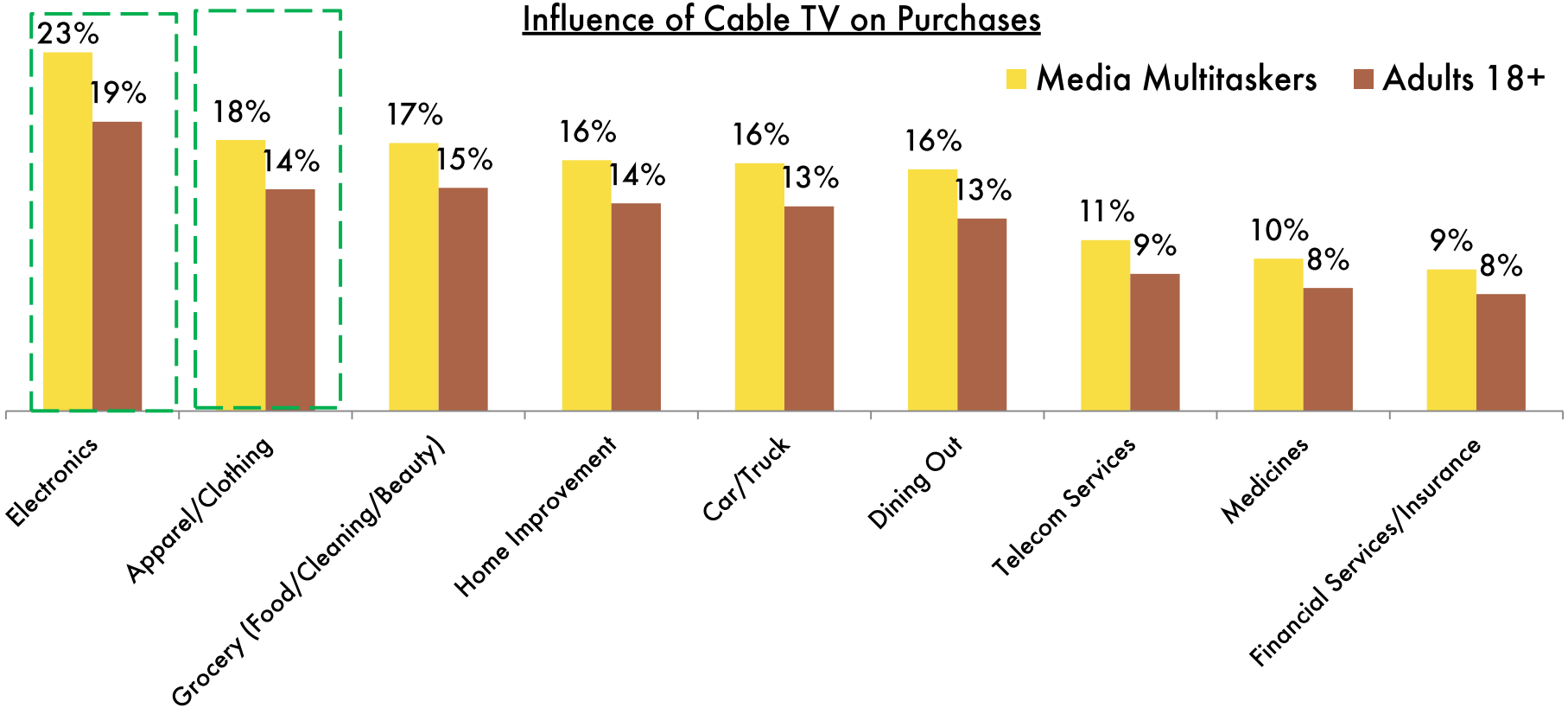
They're Paying Attention:

Cable TV Influences Media Multitaskers' Purchases More Than It Does the General Population

- **Especially Electronics and Clothing**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Cable TV)



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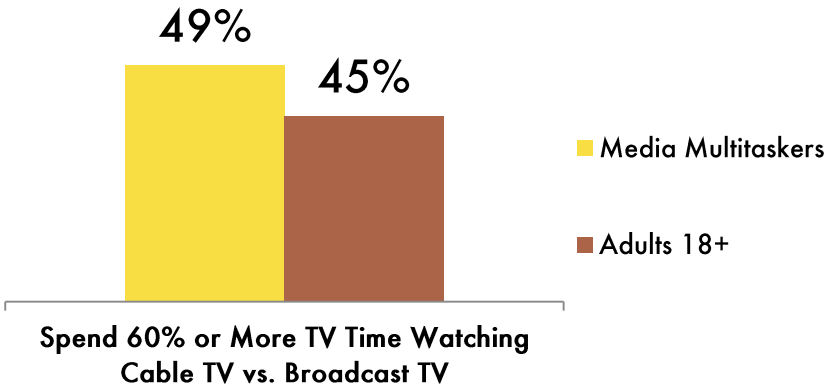
They're More Likely to Watch Cable TV but More Influenced by Digital Ads

- 49% of Media Multitaskers spend over half their TV time on Cable (vs. 45% gen pop)
- Digital Advertising influences Media Multitaskers' Electronics and Clothing purchases more than Cable TV does

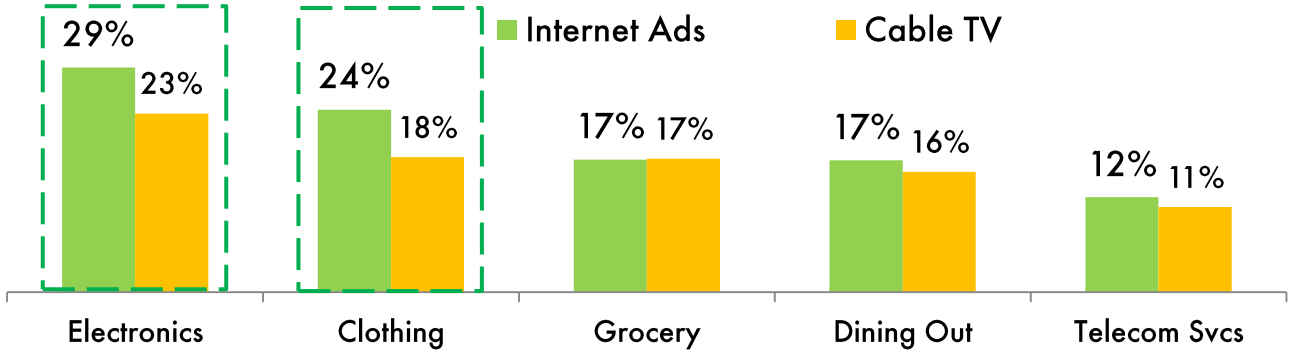
When watching television, on average, what percentage of your time is spent viewing Cable networks (e.g. CNN, Lifetime, USA, TNT, etc.) vs. traditional broadcast networks (e.g. ABC, CBS, NBC, FOX, etc.)?



Spend 60% or More TV Time Watching Cable TV vs. Broadcast TV

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Cable TV, Internet Ads)

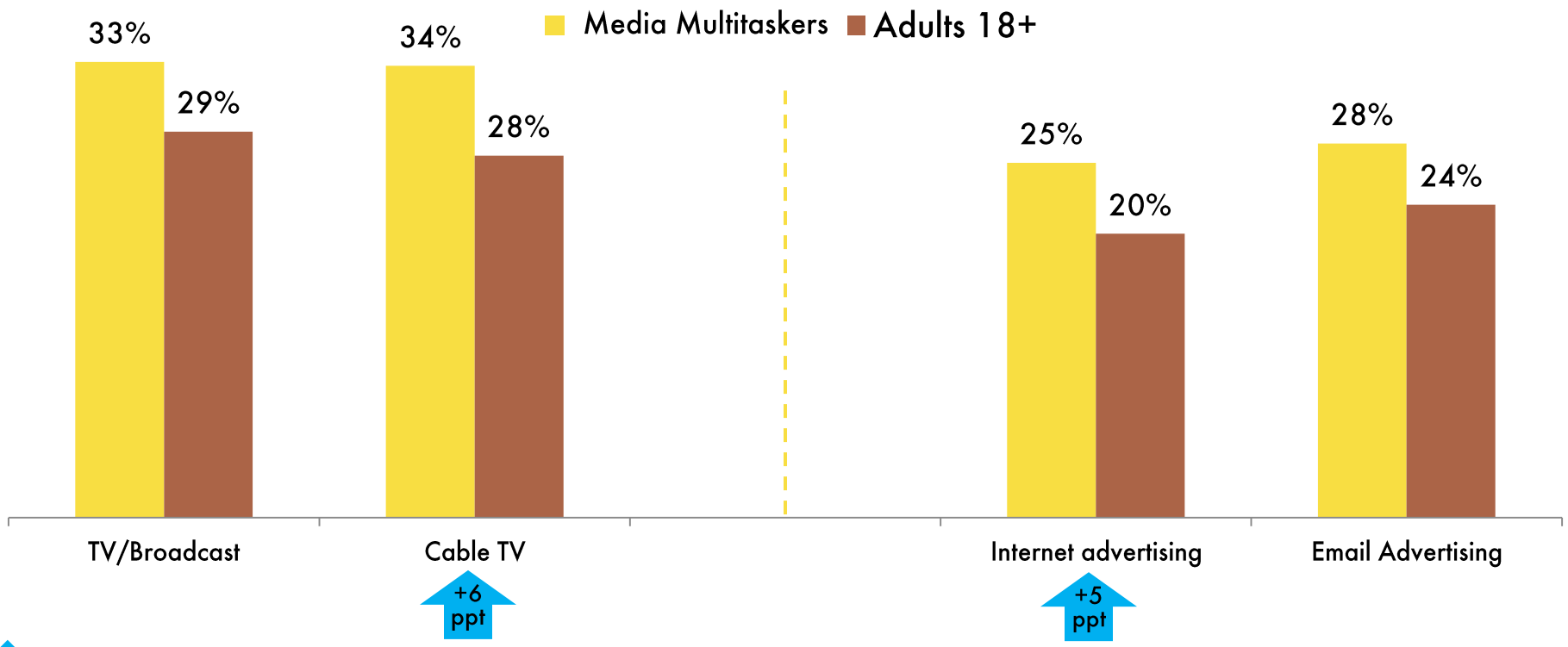
Influence of Cable TV and of Internet Adverising on Media Multitaskers' Key Purchases



They're Paying Attention: Both TV and Digital Trigger Media Multitaskers' Online Searches

- **TV and Digital Ads more likely to inspire Media Multitaskers to do a search**

Which of the following triggers you to start an online search? (Check all that apply)



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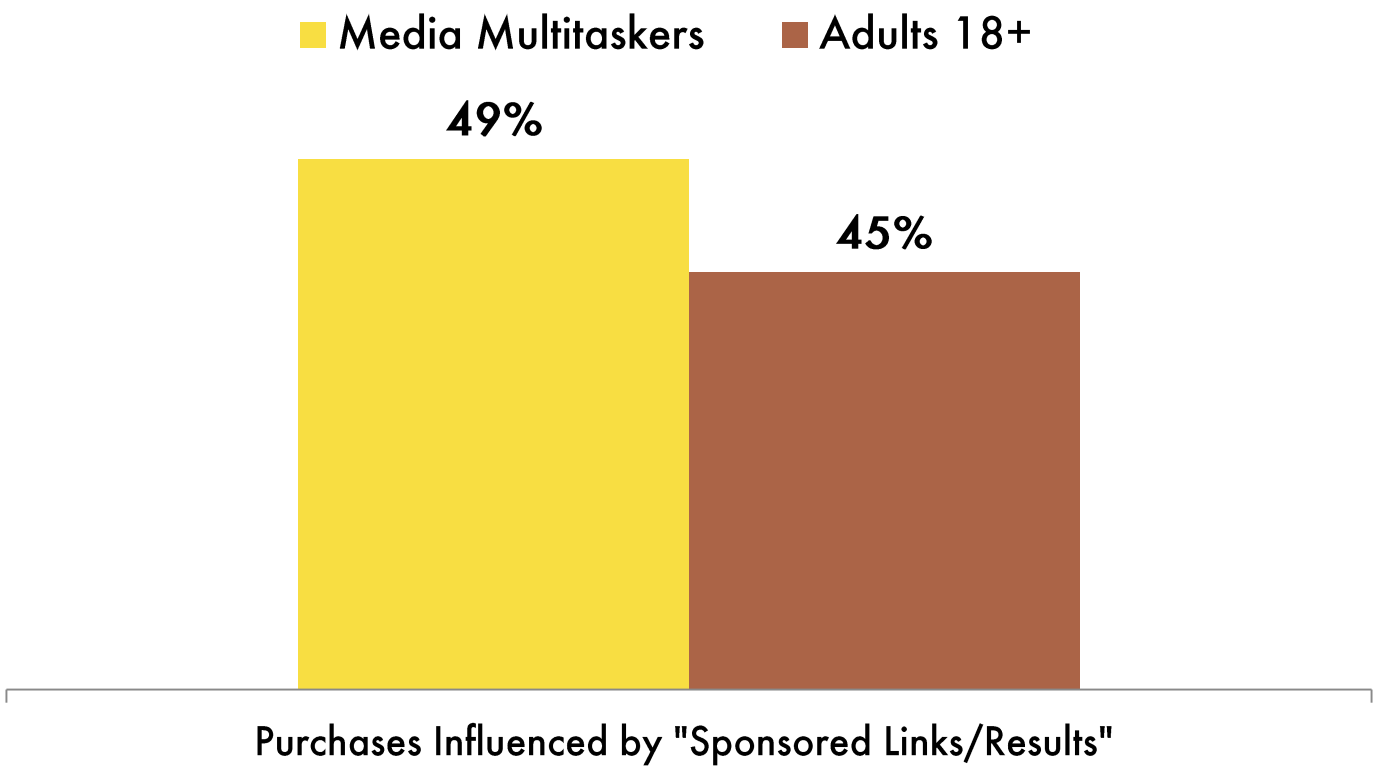
Sponsored Search Results Influence Media Multitaskers' Purchases

- **TV and digital ads send them online to search, where digital advertising influences their purchases**

When searching for products/services on the Internet, how do "sponsored links/results" influence your purchases? (Greatly/Moderately/Somewhat influence)



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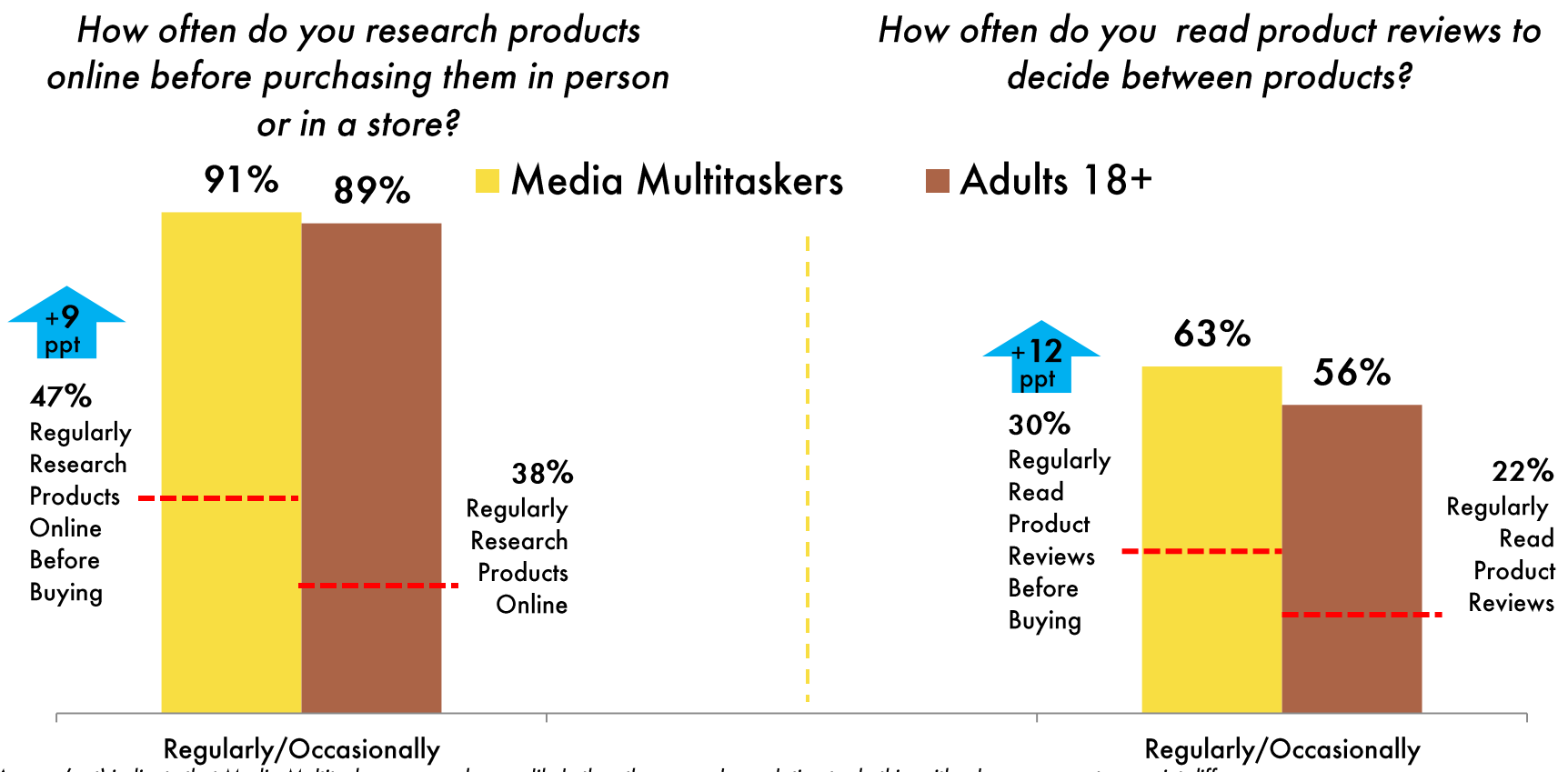
Media Multitaskers Regularly Do Product Research Before Buying

- **Media Multitaskers are more likely than general population to research online, where digital ads are more likely to influence them**



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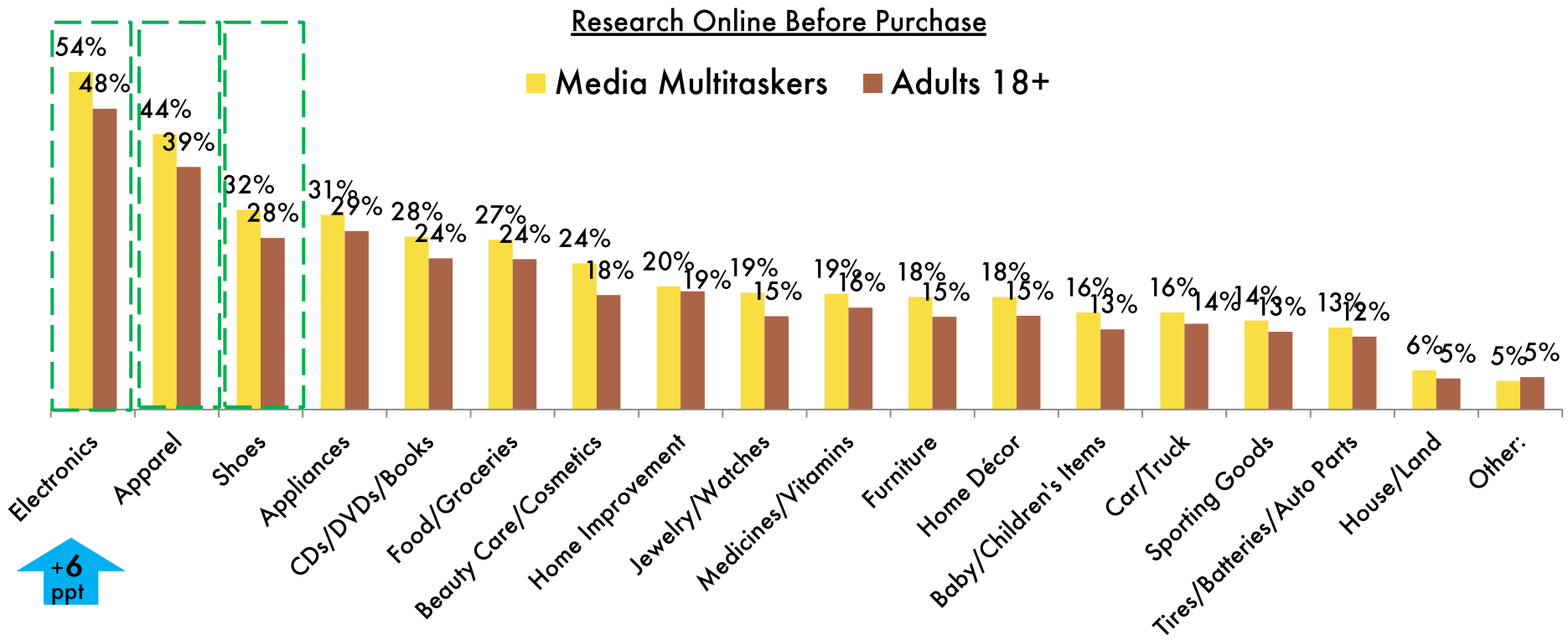
Top Products Researched Online Before Purchase

- **Media Multitaskers more likely to research Electronics, Clothing and Shoes online before buying**

Over the last 90 days, which types of products did you research online before buying them in person? (Check all that apply)



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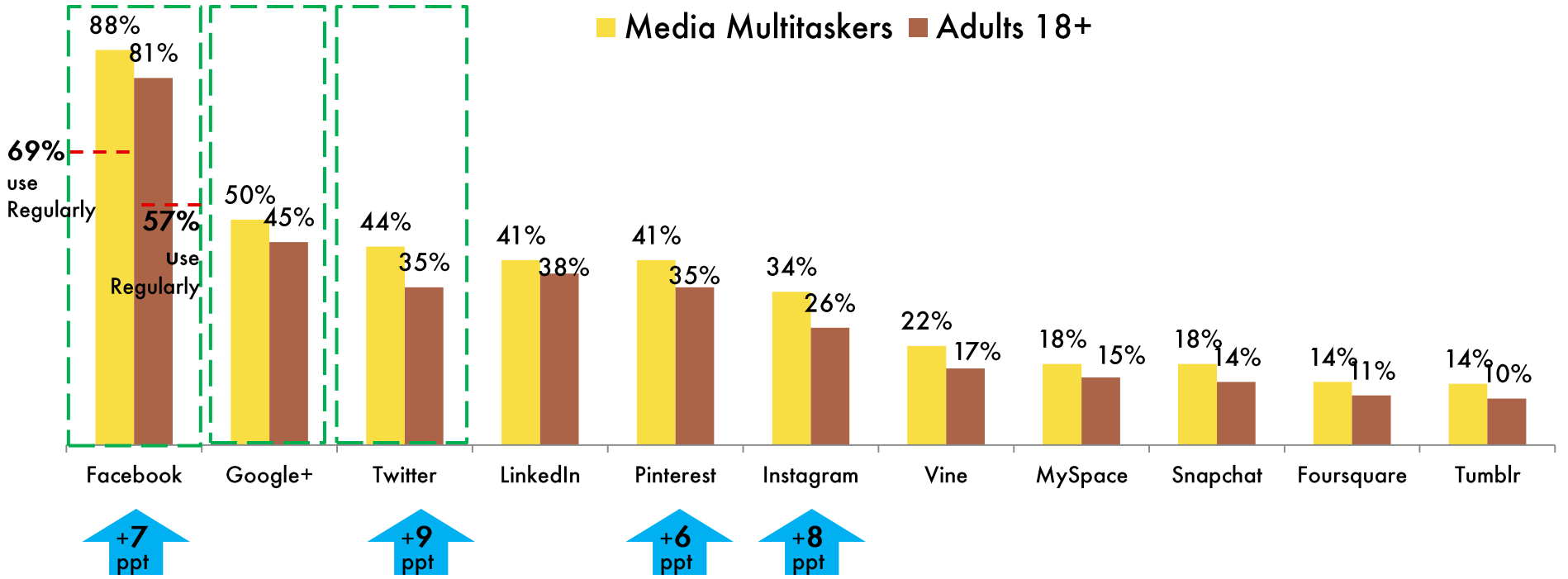
Media Multitaskers are Influenced by Social Media, Video and Mobile

Media Multitaskers are Heavier Social Media Users

How often do you use any of the following? (Regularly/Occasionally)



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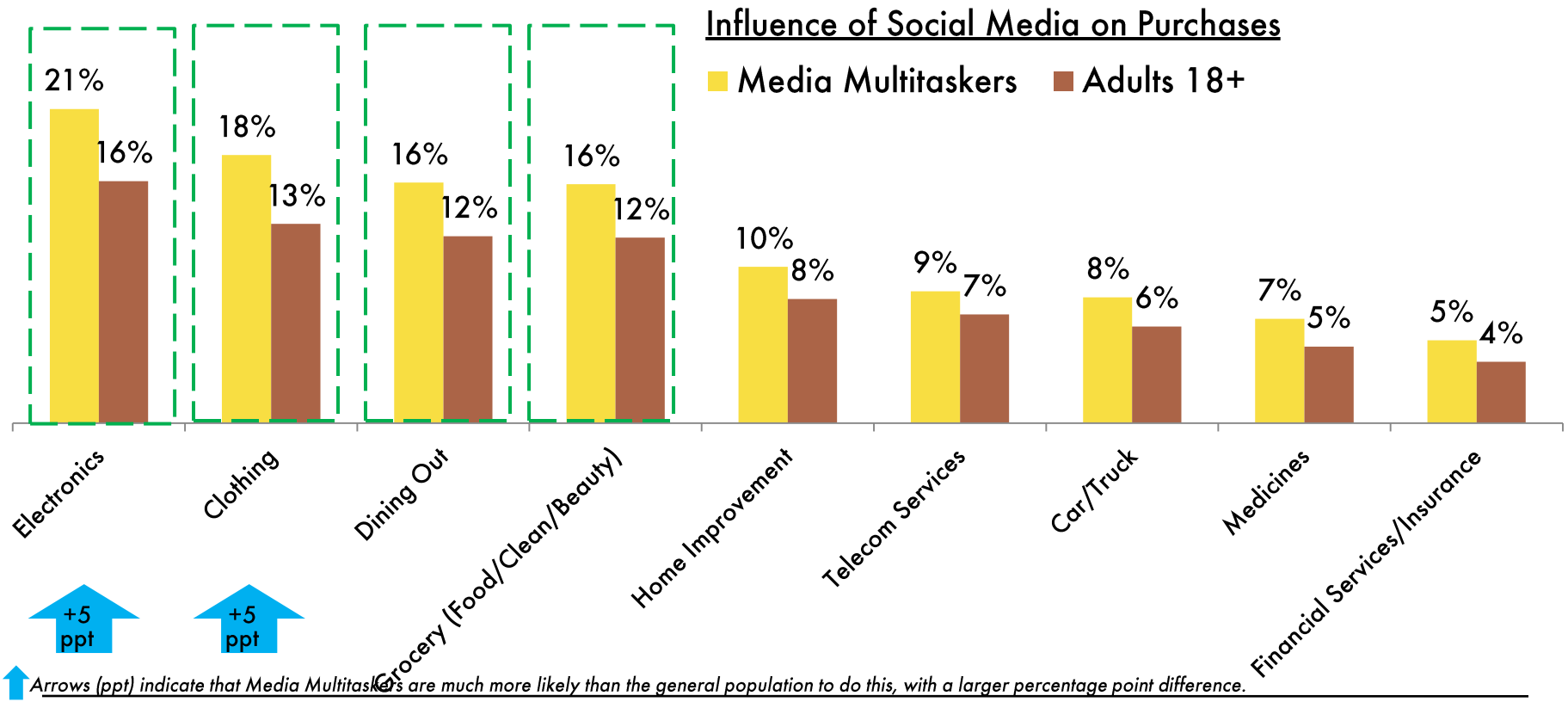
Media Multitaskers' Purchases are More Likely to be Influenced by Social Media

- **Especially Electronics, Clothing, Dining and Groceries**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Social Media)



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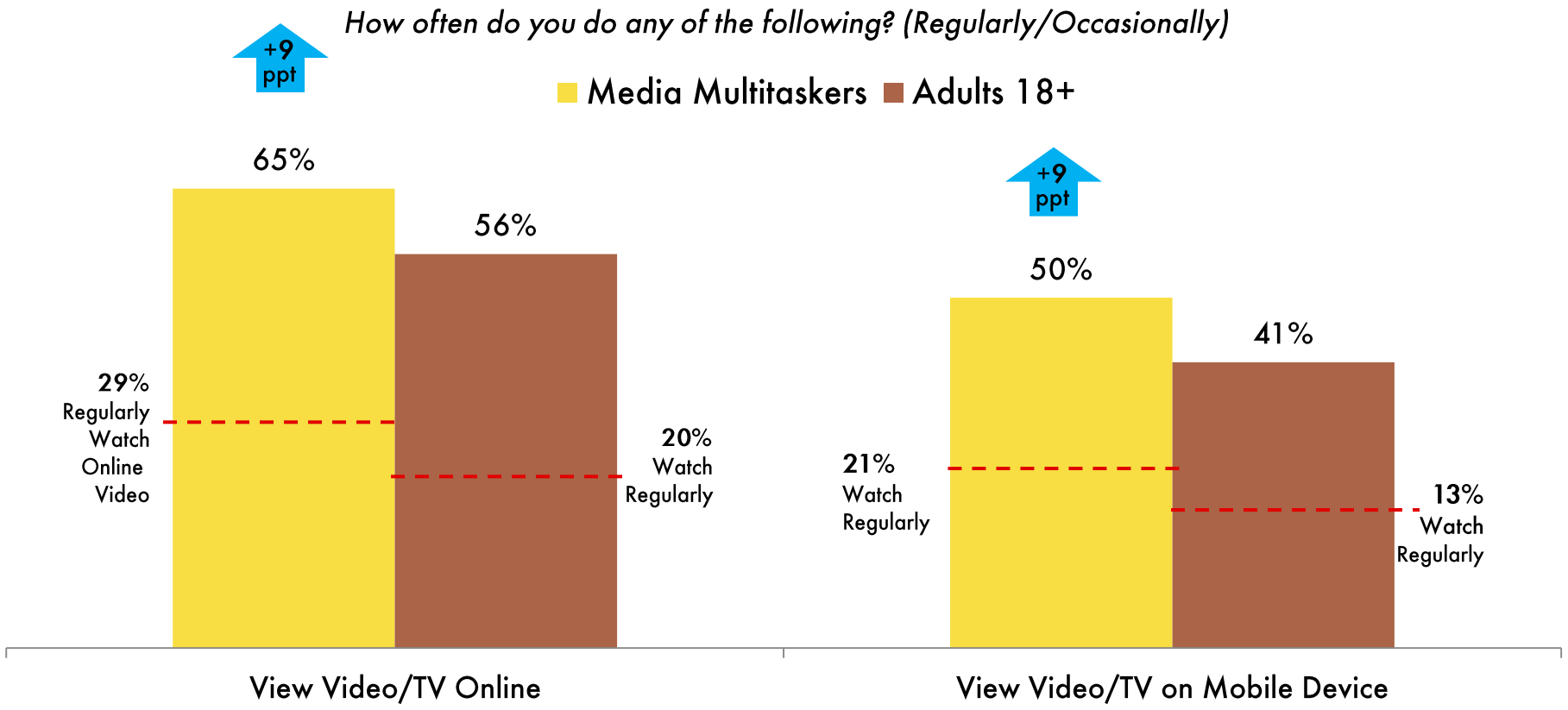
Media Multitaskers are Heavier Video Streamers Both Online and on Mobile

- Two-thirds of Media Multitaskers watch online video and half view video on their phones.



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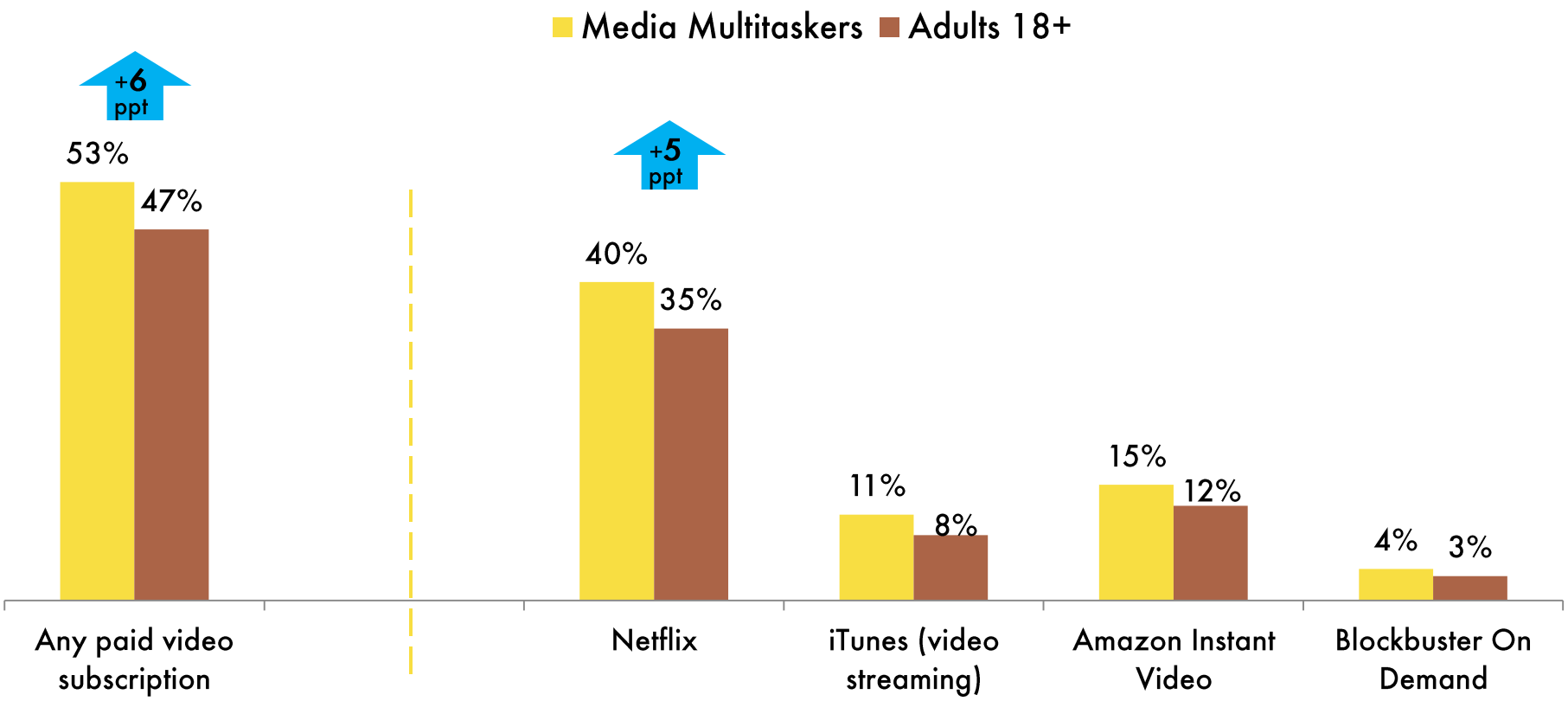
Media Multitaskers are More Likely to Pay for Video Content

Do you subscribe to any of the following paid video services? (Check all that apply)



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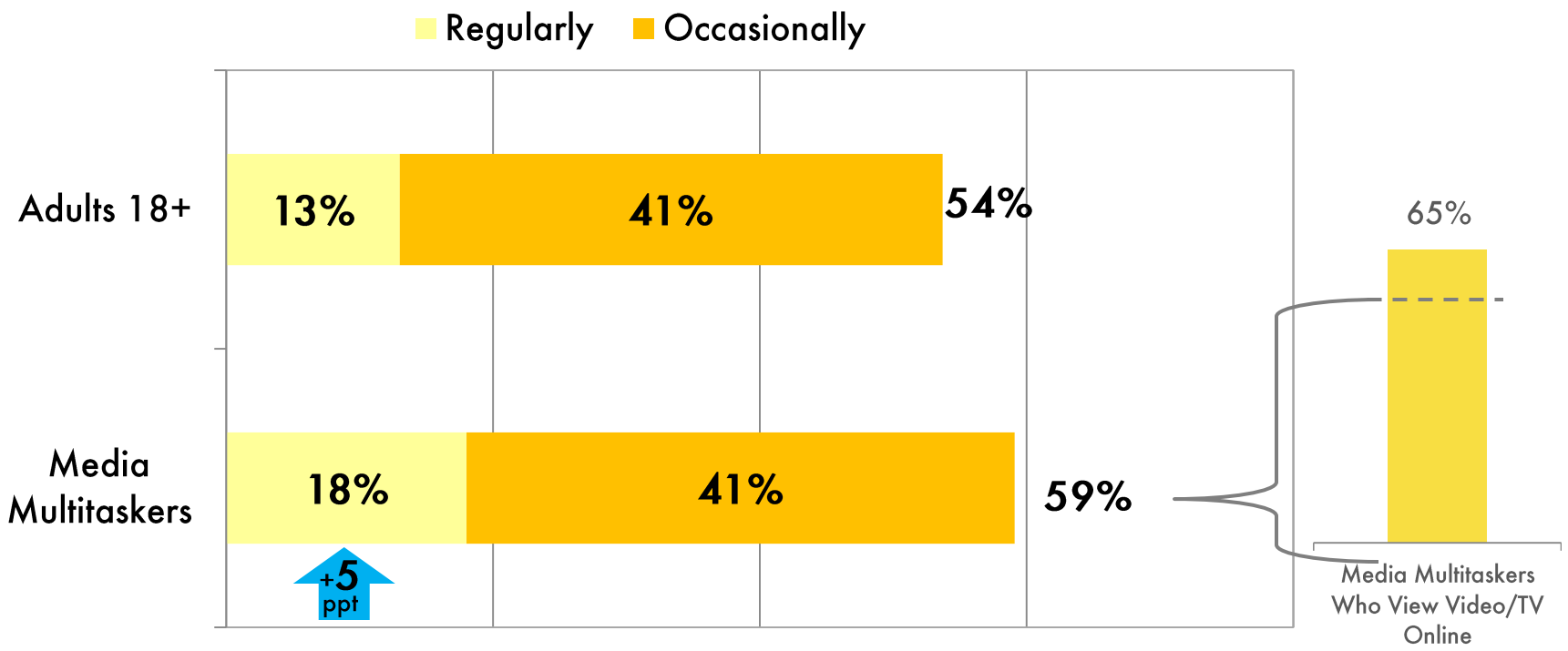
Despite Multitasking, Digital Video Ads Break Through

- **Media Multitaskers are just as likely as the general population to occasionally watch digital video ads and more likely to <u>regularly</u> do so**

Many websites play a video commercial prior to playing the video content. Please tell us how often you watch those commercials

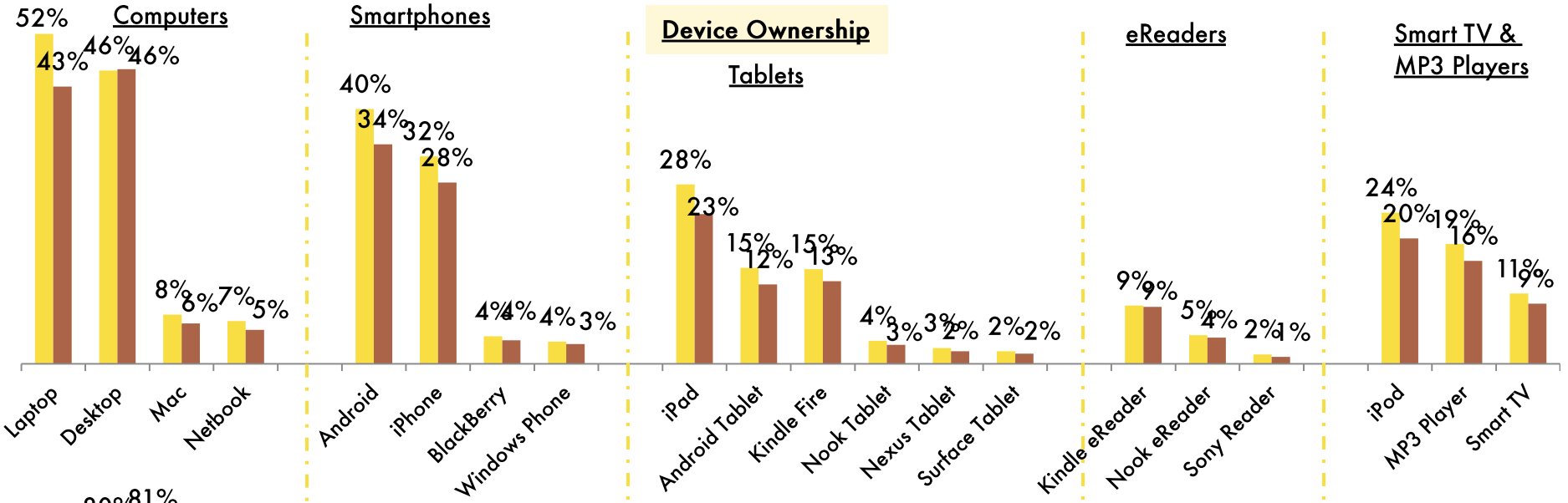


Arrows (ppt) indicate that Media Multitaskers are much more likely than the general population to do this, with a larger percentage point difference.

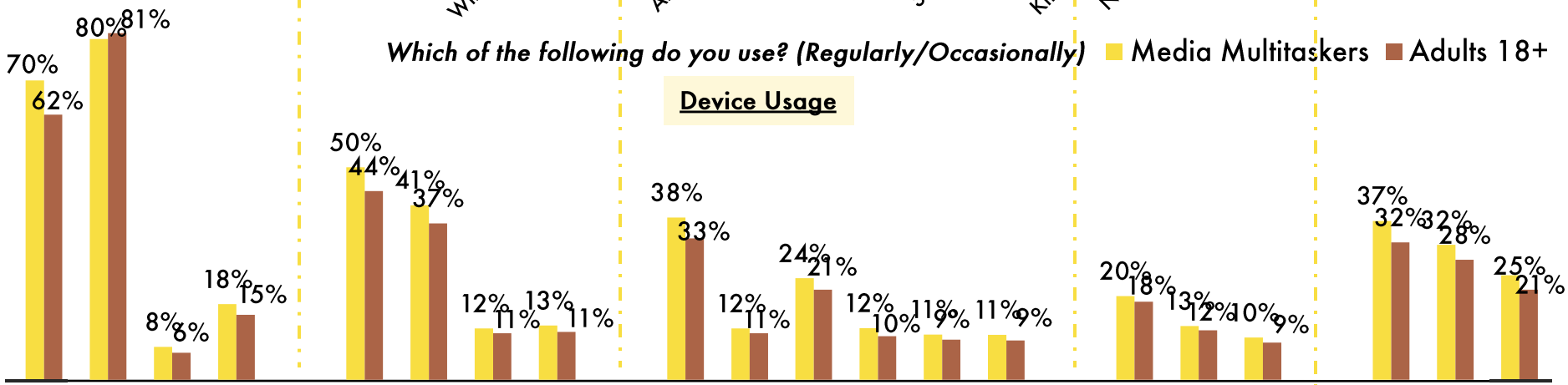
Media Multitaskers are Adults 18 and older who regularly go online while watching TV. N = 15,410 A18+, N = 6,074 Media Multitaskers

Media Multitaskers More Likely to Own & Use Devices

Which of the following do you have? (Check all that apply)



Which of the following do you use? (Regularly/Occasionally) Media Multitaskers Adults 18+

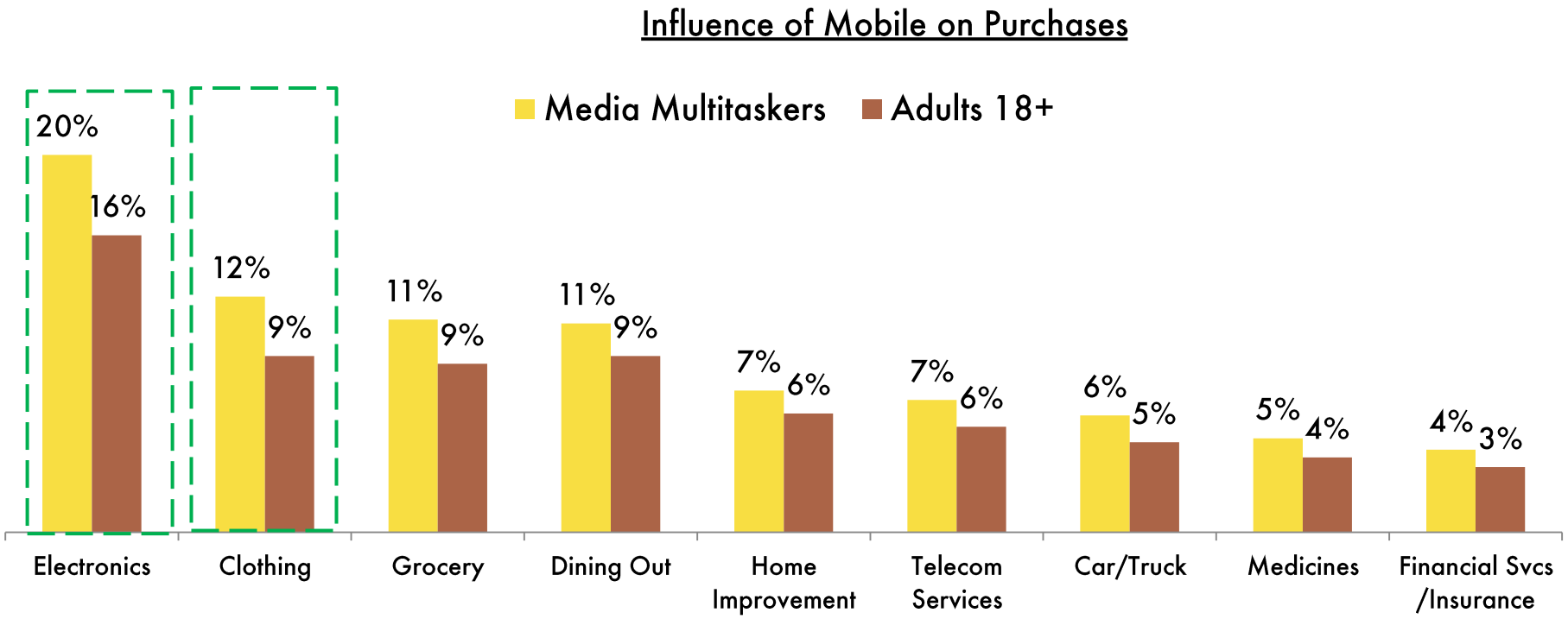


Media Multitaskers are Adults 18 and older who regularly go online while watching TV. N = 15,410 A18+, N = 6,074 Media Multitaskers

Mobile is More Likely to Influence Media Multitaskers' Purchases

- **Especially Electronics and Clothing**

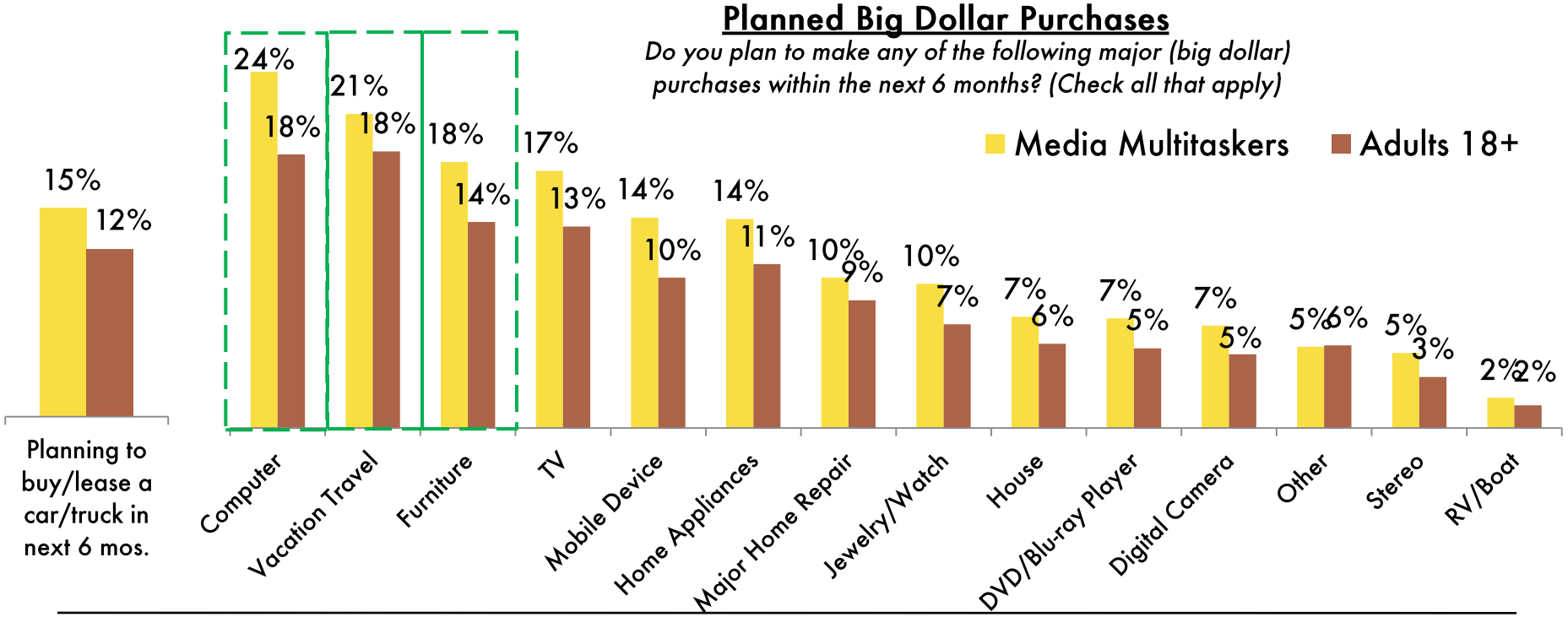
For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Mobile Devices)



Media Multitaskers are Adults 18 and older who regularly go online while watching TV. N = 15,410 A18+, N = 6,074 Media Multitaskers

Media Multitaskers are Planning Major Purchases: How Will You Reach Them?

- Despite multiscreening, they are more likely than the general population to notice ads both on TV and in Digital formats
- Media Multitaskers are more avid users of digital and mobile media and more likely to be influenced by digital media.
- Media Multitaskers' purchase plans combined with their digital purchase influence create ideal conditions for digital advertising to them.



Media Multitaskers are Adults 18 and older who regularly go online while watching TV. N = 15,410 A18+, N = 6,074 Media Multitaskers

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Media Multitaskers and Purchase Influence

Questions?
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