

The Second Screen Fallacy

What It All Really Means

September 2013

IPG MEDIA LAB

MAGNA



GLOBAL

Executive Summary

Second screen is an artifact of total mediation, and specifically refers to the act of using a computer device while the TV is on, which is true of the majority of consumers who own smartphones and tablets.

Occasionally, viewers are using their second screen as a companion or complementary media device for what is happening on the “first screen”—the TV. In fact, second screen is probably the best method we currently have for personalizing the TV experience.

Of course, the trick lies in turning something that is often a distraction from the TV set into an enhanced viewing experience.

Key Takeaways

Here's what you can expect to learn in the following pages:

- Second screen is an industry coping mechanism for the **consumer attention crisis**
- Second screen is helping marketers **recapture consumer attention in the living room**
- Second screen is creating **more targeted television**
- Second screen as an industry **is in its infancy**, but that doesn't stop marketers from profiting
- Social media & TV **are better together**
- Second screen is *[finally]* turning TV into an **interactive, participatory medium**
- Second screen is **not “one size fits all,”** you must think about your audience's behaviors and desires
- For content creators and marketers, **ignoring the second screen is a big mistake**
- Brands can (and should!) **contribute to the story-telling**
- **Participation is enabled in multiple ways;** gameplay is one, but note that badges are dead
- As robust commerce solutions emerge, second screen **can help brands “seal the deal”**
- For some, the **“second screen” will become the first screen**

Though Second Screen is in its Infancy...

There are hundreds of players emerging in the space



However, consolidation is coming:



“In the app ecosystem, there’s definitely going to be convergence and consolidation... Apps that are focused exclusively on second screen are going to consolidate with others, because that’s the reality of trying to attract more attention from users... **Apps are going to be doing more things by consolidating and regrouping.**”

– Guillaume Orain



“Every Comcast, Verizon and AT&T will give you a tablet app that has this remote control functionality on it...they will then **buy up GetGlue, Viggle, Miso or whatever app** and it will all be incorporated into these different apps which they will use to compete with each other.”

– Alan Wolk



What's Happening Today?

Social

2.8 million TV-related tweets per day in 2013



TV "Sidekick" Apps

Check-ins, program guides, games, and chatting

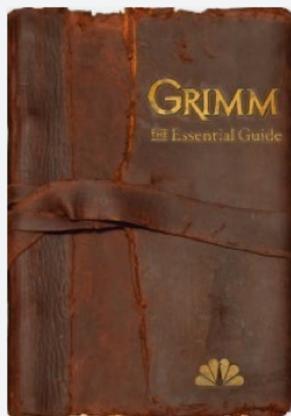


Shazam

Embedded audio codes trigger brand content on mobile devices

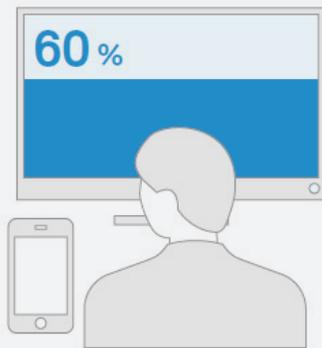


Network and Show-Specific Apps



An Attention Dilemma: Facts and figures on smartphone and tablet owners

60% look at secondary device during TV ad breaks



YuMe

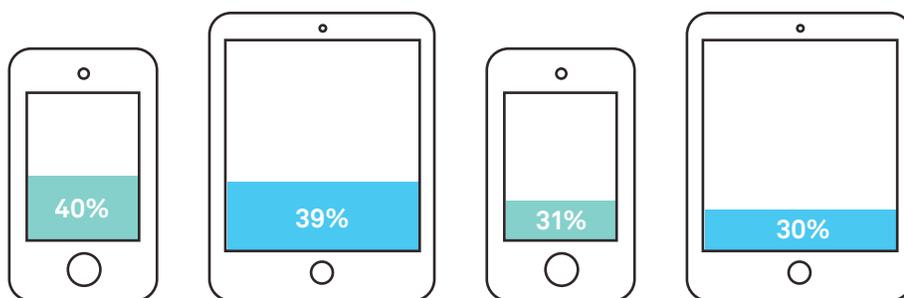
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Users Switch attention between screens 27 times per hour



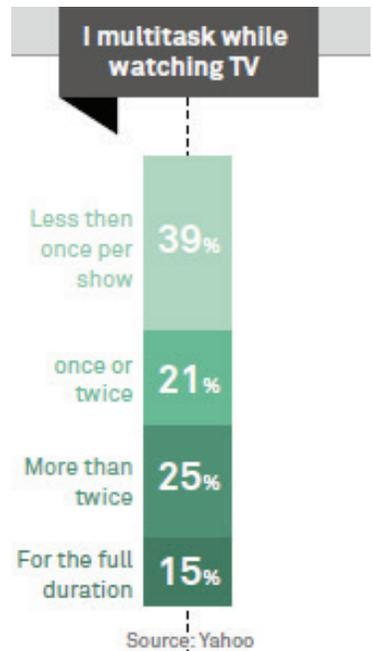
rovi

Percentage that use their devices daily while watching TV
(a comparison of sources)



nielsen

tdg | the diffusion group



What Are They Doing?

Tablets and TV

Skews Older

Age groups 25-34 and 55-64 are the most likely to use their tablets multiple times per day while watching TV.

Typical Activities

Seeking Information

36% of people 35-54 and 44% of people 55-64 use their tablets to dive deeper into TV programs they are currently watching.



Surfing and emailing

55-64 are the heaviest web surfers and email-checkers on tablets during commercial breaks and programs.



Sport Scores

Nearly a third of all tablet users age 25-64 check sports scores on their tablets while watching TV.



Smartphones and TV

Skews Younger

Nearly half of 18-24 year olds use their smartphones while watching TV at least once per day.

Typical Activities

Social Media

44% of 18-24 year olds and close to 50% of 25-34 year olds are visiting social network sites on their smartphones during both commercials and programs while watching TV.



Emailing

is the heaviest simultaneous smartphone activity across all demos, with over 50% of users checking during commercials and programs.



Shopping

29% of 25-34 year-olds shop on their smartphones while watching TV.



Recapturing Consumer Attention

New solutions are emerging to harness “multi-tasking” second screen activity



Uses TV set-top box and mobile exchange data to determine what ads are being seen on television and then serving up related content in apps that viewers happen to be using.



A smart TV operating system provider whose Samba platform allows viewers to quickly sync their mobile devices and share information as long as they are on the same home network. The software can also determine what the viewer is watching on the set.



New “always on” feature automatically tags content and ads it “hears,” without the user having to actively check-in (or “Shazam”).



Twitter’s Amplify ad product enables dual-screen sponsorships and in-tweet video content to be served up in real time. Current TV partners include A&E, BBC America, FOX, and the Weather Channel.

Social and TV are Better Together

Twitter leads the way on cross-screen brand messaging



TV Ad Targeting

Twitter, through its acquisition of Bluefin Labs, uses video fingerprinting to identify when TV ads have aired and finds users that have contemporaneously tweeted about the show. They can then be retargeted with promoted tweets.

Brands that have beta-tested:



Reported
Stats:*

95%

Stronger message
association

58%

Higher purchase
intent

27%

Higher
engagement

New Social TV ad product: Twitter Amplify

Earlier this year, the NBA tweeted sponsored video highlights during the playoffs. Major League Baseball and PGA Golf signed on as Amplify partners shortly thereafter.

*based on TV viewers that interacted with a promoted tweet



TV as Participatory Medium: Deeper Content Integration

Case Study #1 Movie, App

What: Dutch director Bobby Boermans produced a horror film with a built-in second screen experience. The movie is centered around an app called IRIS, a killer version of Siri that sends texts to both the characters and the audience throughout the movie.

There are also additional scenes, and background information regarding what's currently taking place on screen.

How: Viewers download the free App on an Android or iOS device.



Still shot from movie, App

Platform: iOS/Android App

Technology: Audio-watermarking

When: Released April 2013

Insight: The second screen experience was integrated at script-level making the consumer participation critical to the overall content experience.

Our POV: Though this particular example was for a film, we feel the findings apply to TV as well. As with brand integration, the earlier the advertiser can participate in the production process, the more organic the second screen experience will feel.

TV as Participatory Medium: Gamification

Case Study #2 Million Pound Drop

What: A companion app to the hit British game show The Million Pound Drop, which allows viewers at home to play along in real-time, and continue playing anytime for a minor in-app purchase.

How: Viewers download the app to play along anytime. Within the app, they can apply to be a contestant on the show, play against friends, and share scores to social networks.



Platform: Proprietary iOS / Android app

When: Premiered June 2012

Results: At its peak, 189,000 people (8.6% of the viewing audience) were playing along.

Insight: The viewers become active participants in the show, blurring the lines between content and audience.

Our POV: Gamification, as a way to drive audience participation, works best when the game-play is **intrinsic** to the show content.

TV as Participatory Medium: Gamification

Case Study #3 Oreo

What: The Oreo “Cookies or Creme” real-time social media campaign that ran during the Super Bowl 2013.

How: Viewers of the TV spot were asked to post a photo to Instagram and tag it with one of two hashtags: #cookiehis or #cremethis. Selected photographs were transformed into sculptures using either Oreo cookies or creme as the medium.



Platform: Instagram

Technology: Time-stamping (synched with local programming schedules)

When: Super Bowl XLVII (2013)

Results: In the 60 seconds following the spot, the number of @OREO Instagram followers jumped from 2,000 to over 20,000.

Insight: If you invite viewers to participate in a way that enhances their viewing experience, they will.

Our POV: While the Super Bowl is second-to-none in commercial attentiveness, inviting the viewer to engage with the brand and put their own stamp on it is good practice for other programming as well. The real-time element is probably best utilized in live tentpole events.

Gamification: The death of the “check-in”

BADGES ARE DEAD!

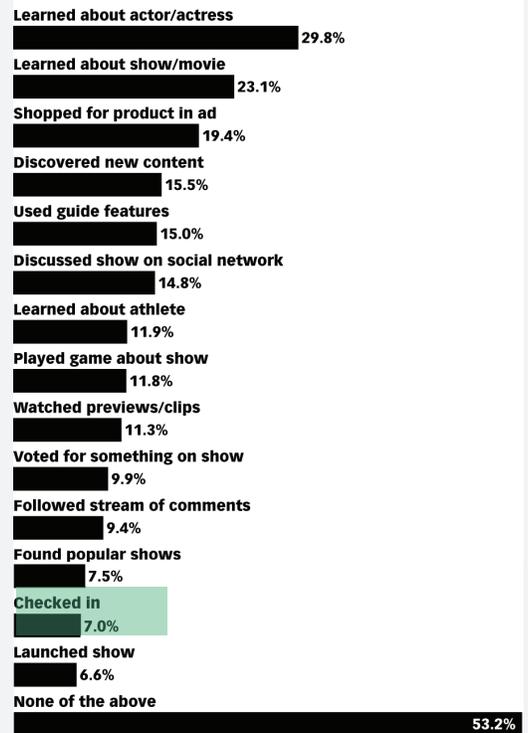
“Checking in,” especially to earn a badge, is amongst the things “second screeners” are least likely to do.

Gaming (in second screen) overall is low: only a few people participate in games (12% of people played a game about a show while only 7% checked in).

There is high repeat usage amongst those that do game... However, we don’t see this amongst those who check in.

Source: NPD Group / Second Screen Summit, June 2013
eMarketer, February 2013

Simultaneous Activities Performed on Devices* While Watching TV** According to US TV Viewers, Feb 2013
% of respondents



The continuing demise of the “check-in”



GetGlue :
moves on from social check-in to become mobile entertainment app,
February 2013



Shazam :
launches auto-tagging for iPad,
May 2013



Foursquare :
tests seamless check-in app,
August 2013

Sealing the Deal: T-Commerce

Going from seeing to buying, instantly

There is some disagreement on the definition of T-commerce, but in this case we are defining it as any online shopping behavior driven by TV viewing, whether it occurs directly on a smart TV or a secondary device.

The key to creating a “shoppable” experience is making it as simple and seamless as possible for the user, hence we think the real potential lies in retailer apps which have large built-in user bases.

Retailer apps represent some of the top-rated apps in various app stores



4th most visited mobile property
10 million Prime subscribers



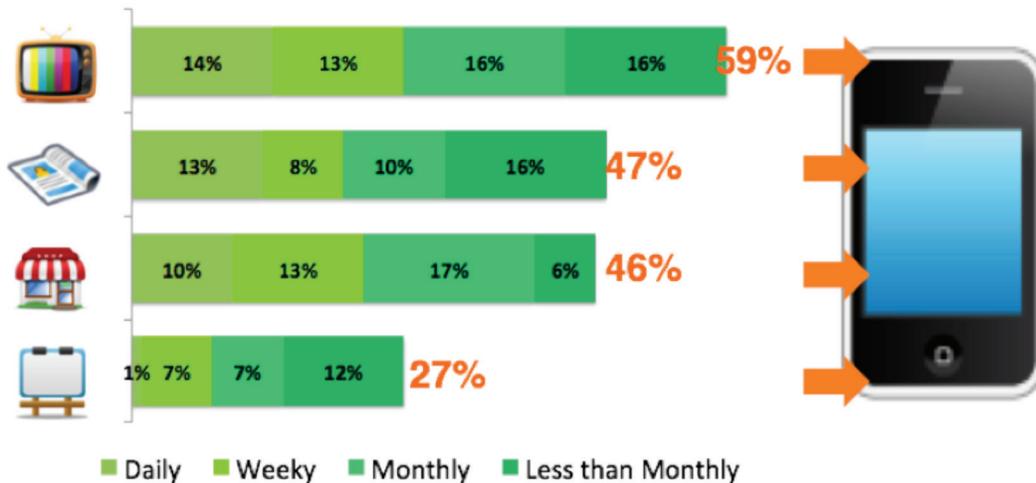
11th most visited mobile property
Watch with eBay already active since
march 2012



90 million users in the US
Shopping via Shazam enabled

Source: Comscore
Mobile Metrix,
April 2013

Users are more likely to search a brand following a TV ad than any other medium.



Frequency with which US Smartphone Owners Search on Their Smartphone in Response to Select Offline Ads, March 2012

Sealing the Deal: Buying from the Second Screen Directly

Case Study #4 Watch With eBay

What: The app allows users to find and buy items on eBay as they appear on screen in their favorite TV shows.

How: Viewers download the app, enter their zip code and cable provider, and select the channel they are watching. The app then brings up items for purchase related to the on-screen content.



Platform: iPad app

Technology: Time-stamping (synched with local programming schedules)

When: Launched as standalone app in March 2012 (previously part of the regular eBay app)

Insight: It's not just about "shoppable" content, but shopping as content.

Our POV: eBay's merchandise breakdown is now 70 percent retail and 30 percent auction, meaning there is a strong (push) to enable a relatively seamless and integrated shopping experience.

T-Commerce Vendor Spotlight: Delivery Agent

Case Study #5 Delivery Agent

What: Delivery Agent's EngageTV platform makes TV advertising interactive and actionable. For example, during an ad for the US Army, a banner pops up along the bottom of the TV screen. With one tap of the remote, a viewer can opt to receive further information in the mail. There is no need to enter an address, since the cable company already has that information.

How: Delivery Agent works with electronic manufacturers and cable providers to get their technology into TVs and set-top boxes. Delivery Agent's digital T-commerce marketplace, ShopTV, recently launched on Samsung SmartHub in July 2013.



Platform: Cable boxes / Smart TVs

When: Gradual rollout starting 2010

Insight: T-commerce, or commerce driven by TV content, is going to grow in general, regardless of screen. Mobile and tablet will be among many (important) screens in the commerce ecosystem.

Our POV: As the tech catches up and consumers are trained to shop the shows or ads they watch, the T-commerce marketplace will mature.

“We are at a pivotal moment in the industry, where the ecosystem has been developed to allow customers to shop directly from their TV with a mobile device or remote control.”

– Mike Fitzsimmons, Delivery Agent CEO

DELIVERYAGENT

Beginnings of Measurement



Nielsen/Twitter TV Rating

What it Measures: Unduplicated reach of TV-related tweets, impressions (number of tweets viewed), demographics

How: Combines de-duplicated Twitter TV activity from Nielsen-owned SocialGuide with Nielsen TV viewer data to determine audience profiles

Availability Timeline: 4th Quarter 2013 (reach metrics only)

Our POV: Nielsen has not provided a lot of detail on how the data will be reported, nor how the demographics will be ascribed. Plus, the release of the demo portion of the product has been pushed to early 2014. We are skeptical about the value this product will have in the early stages.



Shazam Engagement Rate

What it Measures: Shazam tag volume for each commercial spot, divided by the GRPs for the TV airing

How: Combines Shazam tags and Nielsen ratings

Availability Timeline: Today, but only for advertisers partnering with Shazam

Our POV: We definitely see value in having this feedback for Shazam-tagged campaigns, as there is potential to adjust TV activity based on viewer interactions during programs.



SAM Cross-Media Measurement

What it Measures: Simultaneous media usage on TV and mobile devices

How: An app that both tracks what the user is doing on their device and picks up what they are watching on TV through audio fingerprinting

Availability Timeline: Today

Our POV: While the technology is not perfect, it is the only available detailed, single-source measurement of second screen activity. We think it has a lot of potential and has largely flown under the radar.

Looking Ahead: 3-5 Years

For some, the TV (and all other screens) will become the *second(ary)* screen

Some companies are seeing that mobile is not just a companion screen for TV, but a companion screen for life.

Mobile as content hub – the majority of web-based content is accessible through consumers' mobile devices

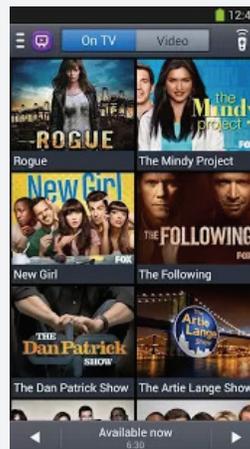
Samsung "WatchON" app – serves as a program guide and remote control for compatible TVs, and enables the user to start watching on their mobile device and finish on the set—also includes a recommendation engine and social features

Twitter/Sky relationship in Brazil - if a show has been tweeted, just re-tweet with #skyrec to save to your DVR

Mobile recommendation engines – GetGlue has expanded entertainment recommendations to films that are in theatre

Anytime/anywhere interactions – TVTak has expanded its visual recognition technology from TV to other media, including product

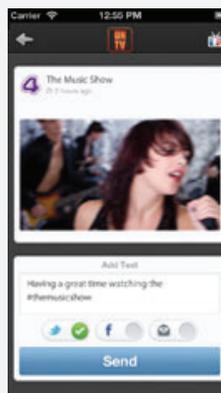
TV as display for mobile streaming – Google Chromecast and Apple TV enable viewers to stream video from their mobile devices to their TV set



Samsung "WatchOn"



Twitter/Sky, Brazil



TVTak



Chromecast



Apple TV

Conclusions and Recommendations

- Viewer attention can easily switch from one screen to another—use a multiscreen approach to create a fully realized experience for the consumer
- Viewers are already using social media while they watch TV—why not take the opportunity to reinforce your message there?
- Second screen is not only a way to intercept a distracted consumer – it is also a way to laser-target your consumer
- Get viewers involved; they will gladly engage with your brand if you let them contribute in some way
- Games, if done properly, can keep viewers tuned in
- Getting involved with a production as early as possible will help second screen elements feel organic
- Partnering with popular retailers could create the opportunity for viewers to quickly buy your product after seeing it on TV
- Be an early adopter—while some second screen solutions are still in the early stages, it pays to get in on the ground floor and test

“Attention is perhaps the most precious commodity in today’s media environment. With more and more media options competing for every waking moment, the battlefield quickly turns to capturing consumers’ attentiveness and receptivity to brand experiences... second screen is an area that has the potential to either destabilize or grow the television business. That business is incredibly important to us as marketers and as such we must continue to test, learn and explore how to capitalize on this emerging opportunity.”

– David Cohen, Chief Media Officer



About

The Lab's single focus is to find new ways to solve problems by applying the latest technology to marketing challenges through custom-tailored, client-led experiments. We start with talking to our clients and identifying their challenges, and then determine how to use emerging technology to solve that problem. We find successful solutions that are then implemented into the real world and utilized for all to see. [@IPGLAB / IPGLab.com](#)

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