3 Screen Behaviour

The effect of three screen ownership on online and offline behaviour

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Google and Ipsos MediaCT
Friday 16 November

Shift to continuous, anytime, anywhere online use

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Smartphone ownership is at critical mass and tablet ownership is reaching this. This three screen use (PC, smartphone and tablet) has changed the rules of online use from being planned and in a fixed location to 'anytime, anywhere'.

And advertisers need to better understand how these new rules have changed online and offline use to make the most of the evolving online opportunity.

What truth did we want to get to?

How, if at all, does being a three screen user affect online and offline behaviour?

Does tablet ownership create new online behaviour or cannibalise existing use on PC and mobile?

Does three screen ownership lead to a change in use of offline media such as TV and print?
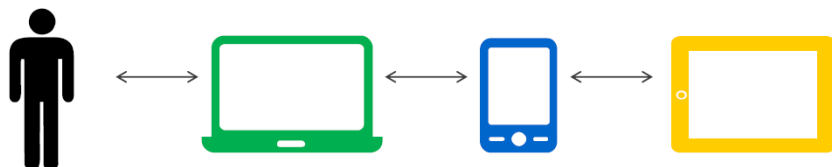
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So, what truth did we want to get to with this research?

Overall, we wanted to understand How, if at all, does being a three screen user affect online and offline behaviour?

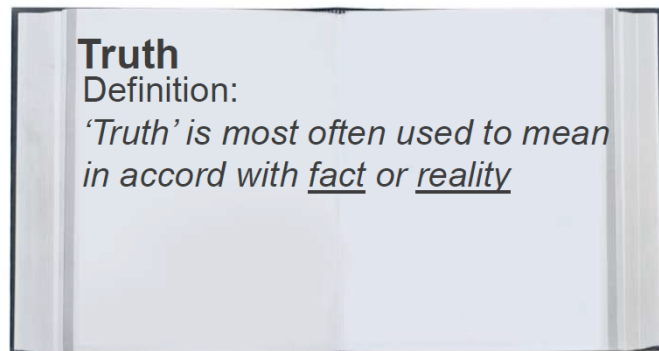And within this, we specifically set out to understand:

Does tablet ownership create new online behaviour or cannibalise existing use on PC and mobile?

Does three screen ownership lead to a change in use of offline media such as TV and print?

Having a better understanding of these changes or consistency in online behaviour would likely help advertisers better navigate the online opportunities to reach their target consumers.

What was our criteria for the 'truth'?
We wanted 'facts' or 'reality' to help deliver insights from the research

Truth
Definition:

'Truth' is most often used to mean in accord with <u>fact</u> or <u>reality</u>
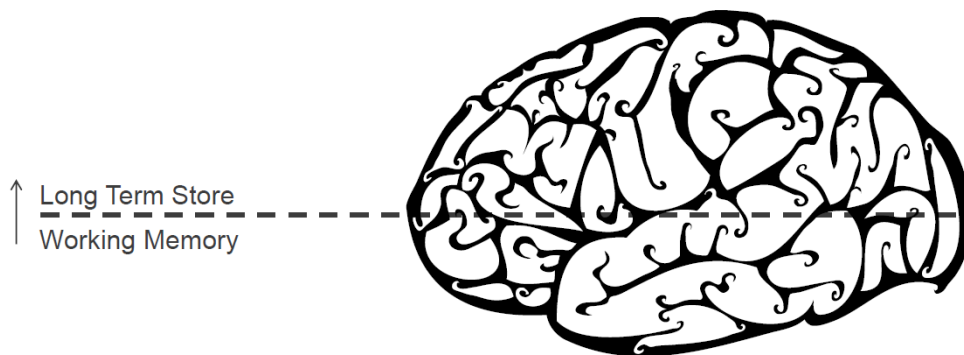
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Before we share more detail on what we did and what we learnt, we thought it best to outline our criteria of the 'truth' we wanted to achieve?

The truth in itself can be a broad concept, though the truth we agreed on was to get research insights as near to fact or reality as possible to best advise advertisers of the online opportunity.

What did we do to get to the truth?

Short term working memory[2] filter limits retention capacity, so delayed recall of online use likely not accurate enough

↑ Long Term Store
| Working Memory

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with Google   2. Baddeley, A.D., Hitch, G.J.L (1974). Working Memory, *The psychology of learning and motivation: advances in research and theory* , New York: Academic Press.

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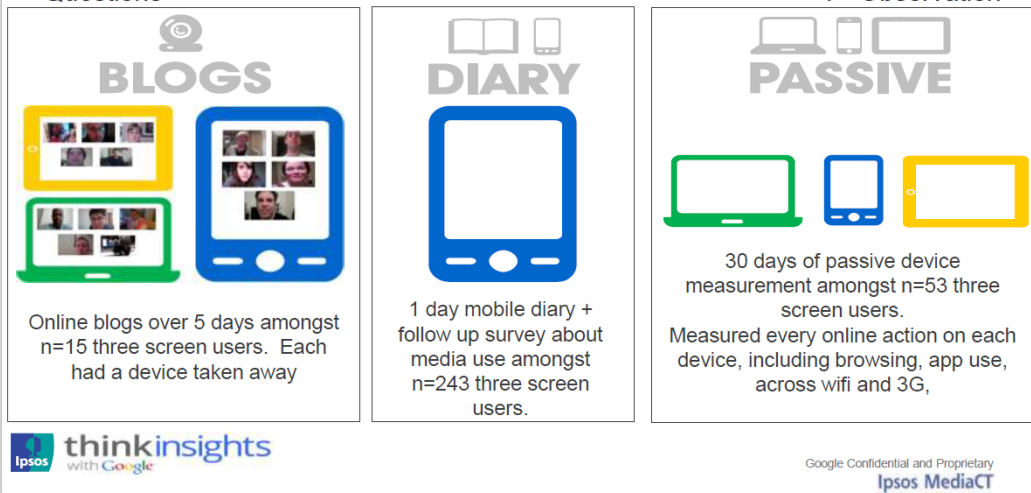Ipsos MediaCT

To get to the truth or 'reality', we decided we would risk gambling with the truth by asking survey questions only.

Using Baddeley and Hitch's model of working memory, it is questionable how much users can remember about their online use and accurately recording and relating this to behaviour was critical to the research. So we knew we had to help respondents as best we can by giving them context to their responses and also measuring their online behaviour.

What did we do to get to the truth?

Questions ——————————————————→ Observation

BLOGS

Online blogs over 5 days amongst n=15 three screen users. Each had a device taken away

DIARY

1 day mobile diary + follow up survey about media use amongst n=243 three screen users.

PASSIVE

30 days of passive device measurement amongst n=53 three screen users.
Measured every online action on each device, including browsing, app use, across wifi and 3G,

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1. Online blogs over 5 days amongst a sample of 15 three screen users, to **further explore the impact tablets have on online behaviour.**

Each respondent had one of their three devices taken away, to better understand the importance of how each relates to the other.

2. **1 day mobile diary amongst three screen users**. 243 respondents respondents download an app to their smartphone which sounds two hourly alarms asking them to record their online and offline media behaviour across PC, smartphone, tablet, radio, print and TV and other sources.

Asking: what they did; what prompted them; when and why they did it; where they were.

Sent an online survey the next day to understand if use **replaced or created new online and offline behaviour.**

3. 30 days of passive device measurement across PC, smartphone and tablet amongst a separate sample of 53 three screen owners.

Participants were asked to install an application on each device to measure their online behaviour and use patterns across the 3 screens.

These applications recorded every online action on each device, including online browsing, app use by frequency, time and, for mobile and tablet, across both wifi and 3G.

Being overwhelmed with data was also a gamble

Different data sources gave us more insight opportunities but there was also the challenge of retaining focus on what was important

BLOGS
75 hours of user generated content across text and video diaries, in and out of the home

DIARY
1,782 diary entries covering **1,546 hours** of media activity

PASSIVE
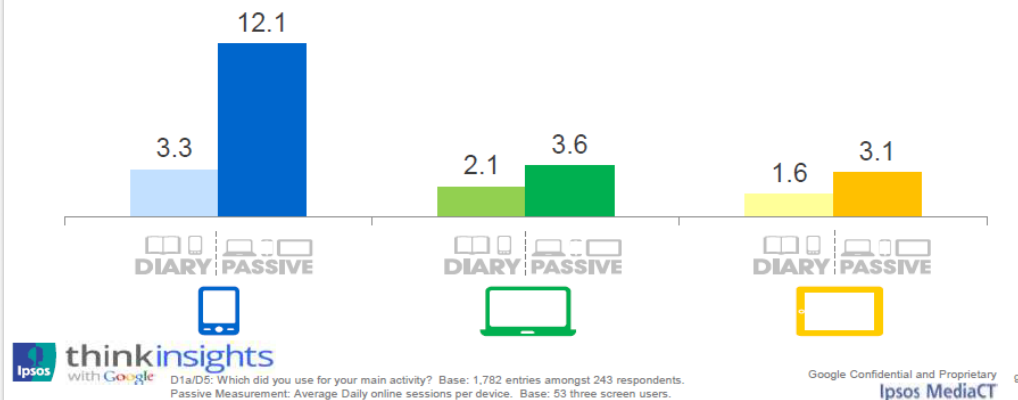30 days of online use, totalling **30,814 online sessions**

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The key truths that we learnt…

So, we've seen that our assumptions can at times depart from the facts or reality of truth we were looking to get to – putting accurate behaviour in context of use. Without accurate behaviour as a foundation, any context respondents gave could have been misleading.

Recall is not as accurate as passive at measuring more frequent online mobile use

Average Daily Online Sessions
Mobile diary recall (last 2 hours) vs. Passive Device Measurement

D1a/D5: Which did you use for your main activity? Base: 1,782 entries amongst 243 respondents.
Passive Measurement: Average Daily online sessions per device. Base: 53 three screen users.

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Before we share some key insights that relate to the brief, we thought it would be useful to share how different recall can be from reality of behavioural measurement when estimating daily use on each device.

With recall via the two hourly diary, we can see that mobile has a higher frequency use, but in reality this is much higher based on device measurement amongst a comparable sample.

This is obviously important to us when wanting to better understand online opportunities in different contexts.
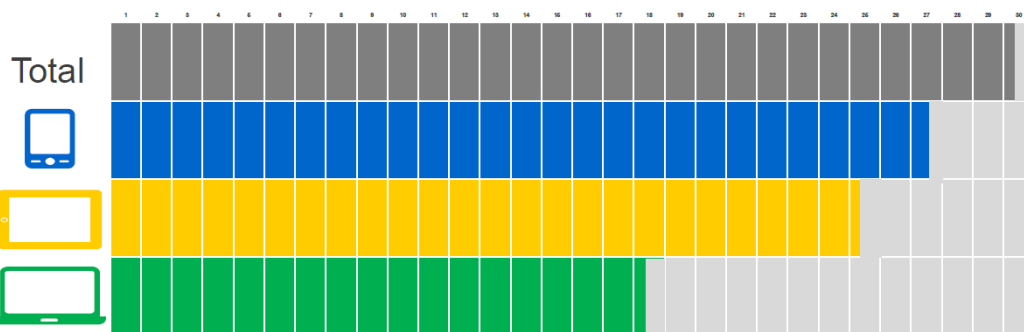
Looking at the passive device measurement we can see that three screeners are online nearly all the time, with only half a day on average when they do not use the internet.

Smartphones drive this as a the constant online companion, but tablets closely follow, with both mobile based devices higher than the PC.
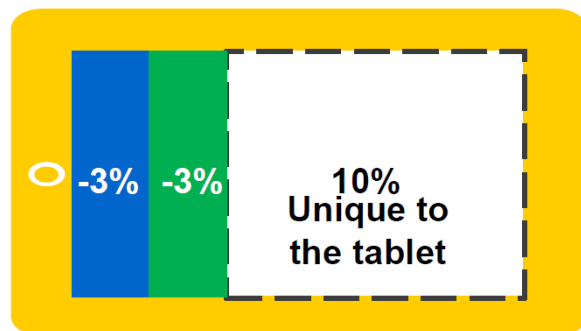
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Tablets create more online use than they cannibalize

TRUE

Tablets have created a net increase in online use +4%

Tablets = 16% of online sessions

-3% -3% **10% Unique to the tablet**

DIARY + PASSIVE

We measured in the passive study that tablets represent 16% of online sessions per month

In our diary study, we asked participants to tell us if they would / would not have gone online at that particular time if they did not have the tablet. If they would have done, we asked which device they would have used.

In relating these two data sets, we see that tablets cannibalise PC and Smartphone use equally, but net increase online use by +4%

This equates to an additional

9 online sessions

and

1 hour 43 mins a month

per user on tablets

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Measurement: Percentage of total online sessions over 30 days across devices
PC5/MO5: Thinking again about when you used your [DEVICE] would you have done this at this

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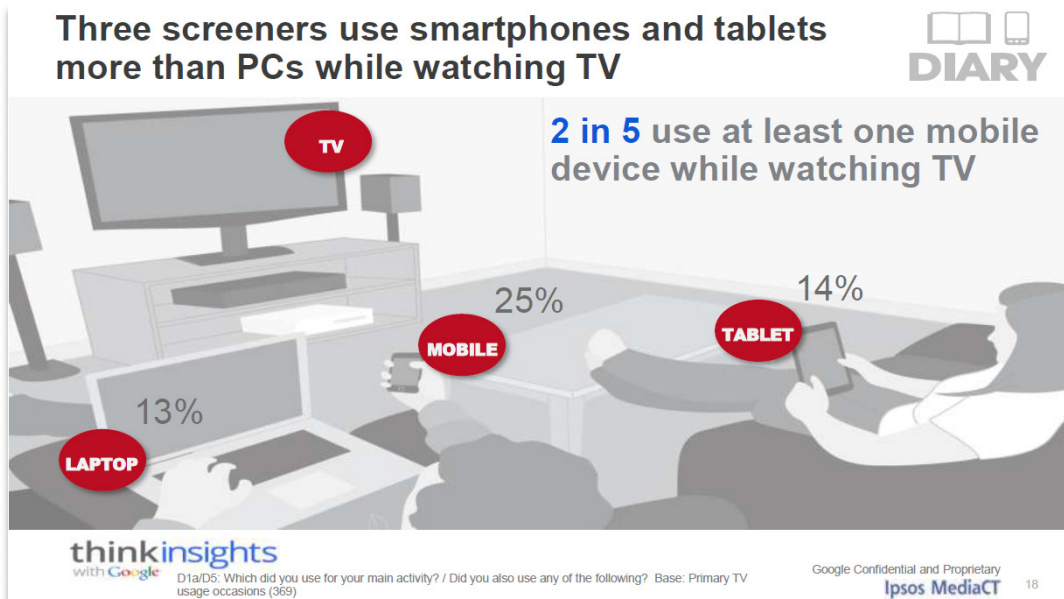with Google

PCs dominate in home online use

Although PC use in home is high, mobile based devices represent more than half of all in-home online use.

Suggesting a broader focus on particularly how the Smartphone opportunity can be exploited – not just 'on the go' but in-home as well.

People use smartphones and tablets while watching TV

Three screeners use smartphones and tablets more than PCs while watching TV

DIARY

2 in 5 use at least one mobile device while watching TV

TV

25%

14%

MOBILE

TABLET

13%

LAPTOP

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with Google   D1a/D5: Which did you use for your main activity? / Did you also use any of the following? Base: Primary TV usage occasions (369)

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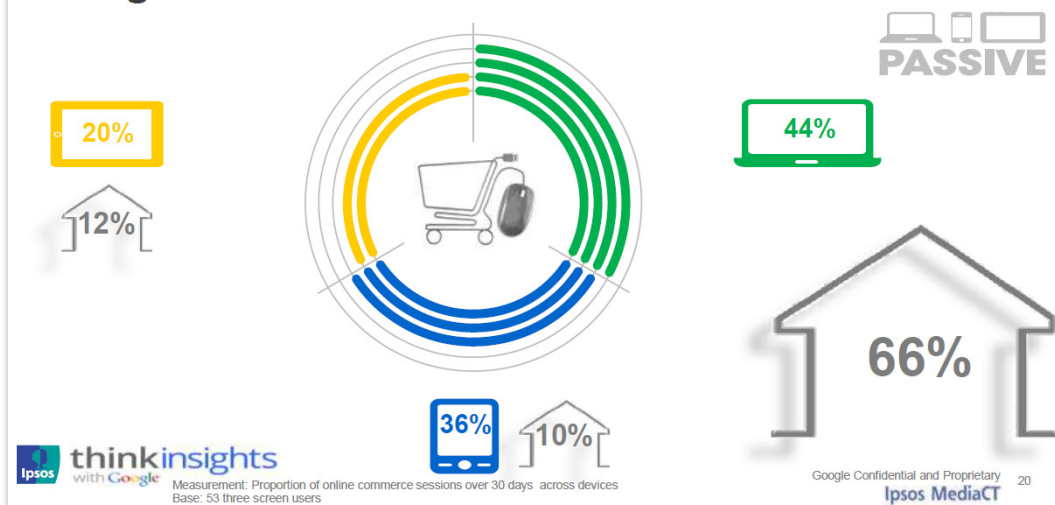TV appears to reflect overall online use in-home.

PCs are used, but not as much as Smartphones and tablets combined while watching TV – 2 in 5

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PCs dominate secure activity such as commerce

FALSE

PCs represent under half of commerce use, though two thirds across devices are in-home

20%

12%

44%

PASSIVE

66%

36%

10%

Measurement: Proportion of online commerce sessions over 30 days across devices
Base: 53 three screen users

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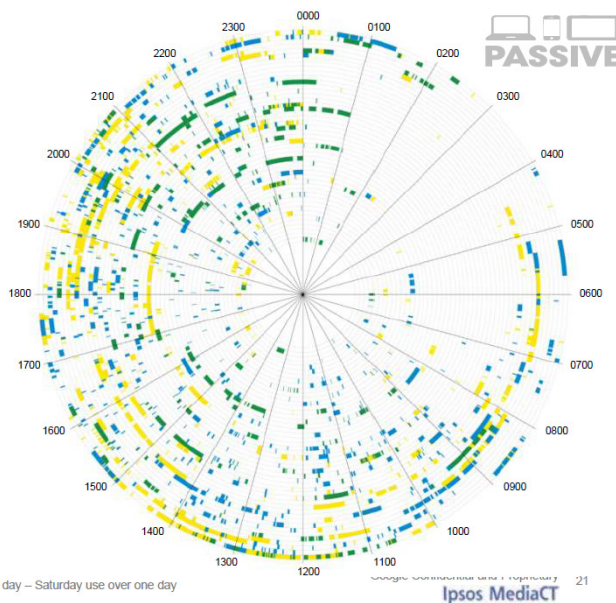**Ipsos MediaCT**

PCs still form most commerce use such as [confirm examples from taxonomy] but we see that mobile devices combined form over half.

There is still though a hesitancy about doing this on the move – combined across all devices, two thirds in home – so purchases may be on mobile, but this may be more considered in-home decision-making that needs further comms to support it.

Weekend - Saturday

Online use is continuous throughout the day across the three screens and each device has different patterns of use...

Measurement: Online time use per device over the day – Saturday use over one day
Base: 53 three screen users

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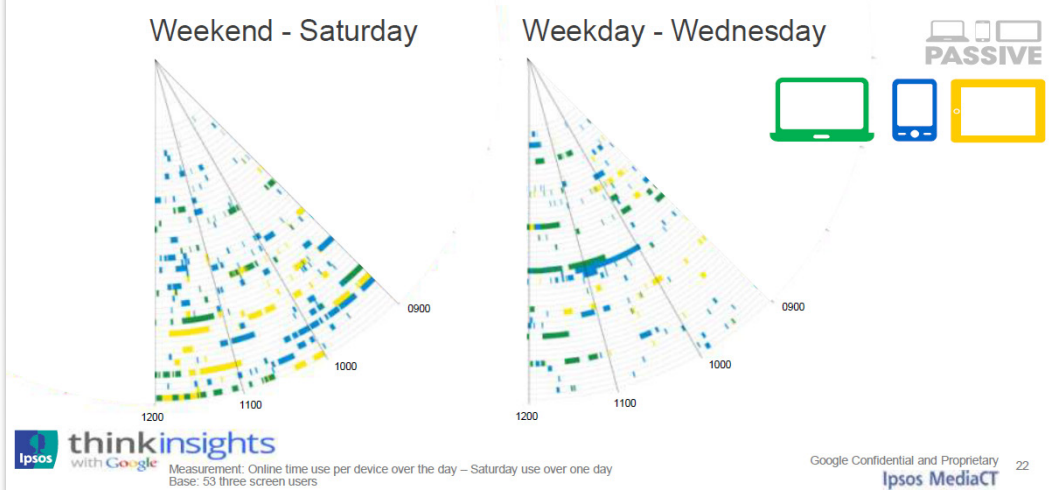
Multiplatform behaviour

But there are some changes, we are seeing a lot more multiplatform behaviour. On average 36% of those who now access content via one of the measured international media brands do so in more than one way/through more than one platform, compared to 20% before these mobile platforms were introduced.

Mobile use is more frequent in the morning at the weekend, possibly planning the day ahead

Weekend - Saturday

Weekday - Wednesday

PASSIVE

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Measurement: Online time use per device over the day – Saturday use over one day
Base: 53 three screen users

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The key truths that we learnt…

So these findings were just a selection of key insights Google are now using to best help our advertisers make the most of the online opportunity.

The implications of unearthing the truths of the always on consumer, more online opportunities with tablet ownership and role of mobile devices in cross-media planning and online purchases are already having an impact in our business.
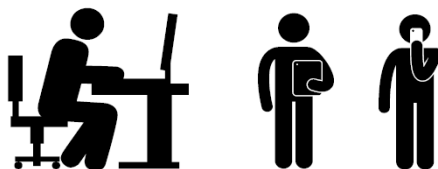
But we also learnt some key research truths…

The research truths we learnt

Users cannot accurately estimate the time they spend online: their devices do a better job at this

Only users can tell us whether their behaviour was new because they own a tablet: we just had to help them by reminding them of things they did

Only users can help tell a research story: observation from device measurement and diaries don't mean a lot without users giving us human context to understand it

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Users cannot accurately estimate the time they spend online: their devices to a better job at this.

Only users can tell us whether their behaviour was new because they own a tablet: we just had to help them by reminding them of things they did

Only users can help tell a research story: observation from device measurement and diaries don't mean a lot without users giving us human context to understand it.

What would do differently to get closer to the truth?

Measure the screen rather than devices: currently, we need to use different applications for each screens, which is not scalable

Link actual device behaviour to considered survey responses: meter the respondent devices and then list out key behaviours in a survey to ask them about the context

Mobile or wearable online devices will change everything: online use will be more continuous and fluid and measurement and research questions will need to evolve to reflect this.

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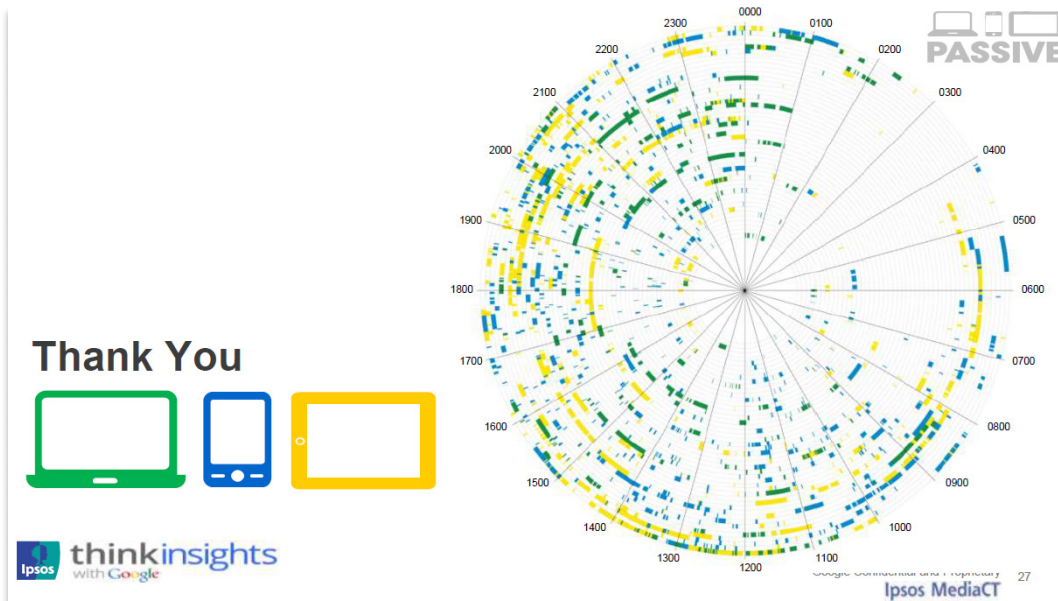Ipsos MediaCT
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While we learnt a lot, we are though mindful there may be a more accurate truth or reality that we have yet to find and as technology advances, we may be closer to identifying this...

So we took a gamble and felt we got to the truth...

...but the more accurate truth could be yet to come

Thank You

PCs still form most commerce use such as but we see that mobile devices combined form over half.

There is still though a hesitancy about doing this on the move – combined across all devices, two thirds in home – so purchases may be on mobile, but this may be more considered in-home decision-making that needs further communication to support it.

Further Information

If you would like to find out more about this study, please contact:

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