HUMANGRAPHEXPERIENCE

presents

ROMANIANS MULTI-SCREENING HABITS

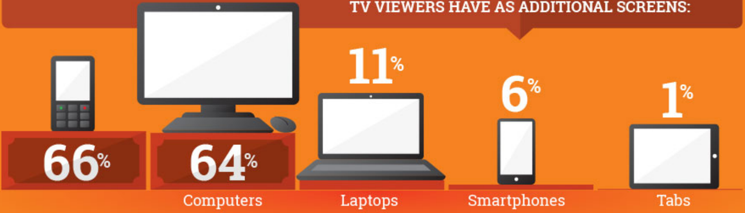
61% of TV viewers are on line connected.

HOWEVER, TV IS CONSUMED MORE HEAVILY VS. ON LINE:

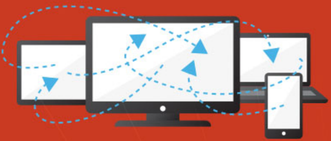
17% of TV viewers go online more than 3 hours/ day

68% of TV viewers watch TV more than 3 hours/ day

TV VIEWERS HAVE AS ADDITIONAL SCREENS:



WHAT IS MULTISCREENING?

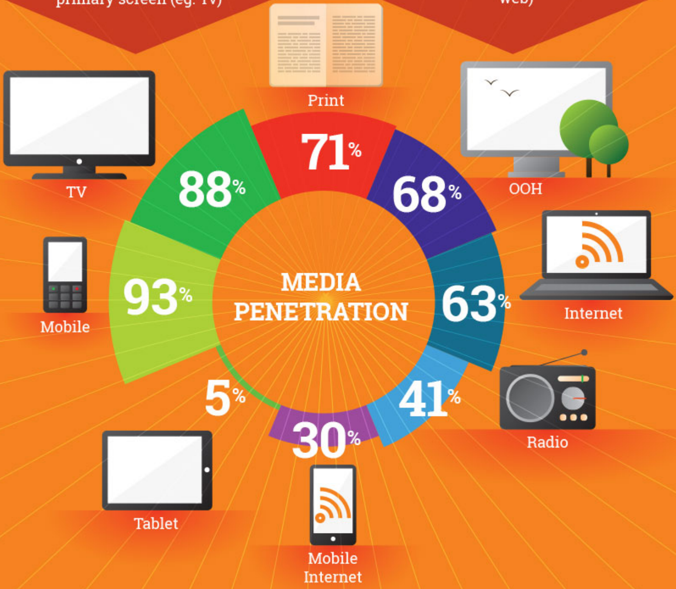


IS ENHANCING A VIEWING EXPERIENCE

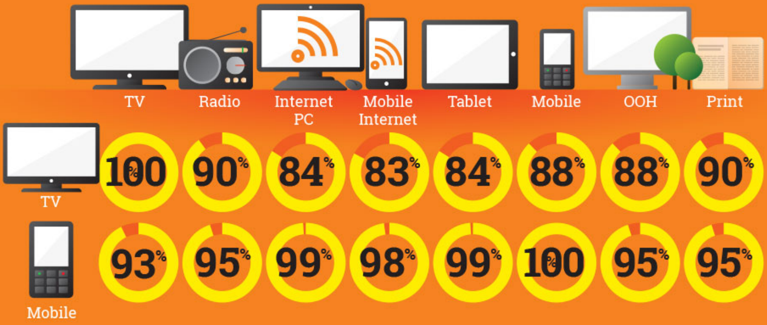
IS NOT MULTI-TASKING DURING A VIEWING EXPERIENCE

Interacting with content via an additional screen (eg. Mobile, tablet, laptop) that is a complement to the content they are consuming on a primary screen (eg. Tv)

Interacting with content via an additional screen that is unrelated to the primary screen (eg. Texting a friend, searching unrelated items, surfing the web)

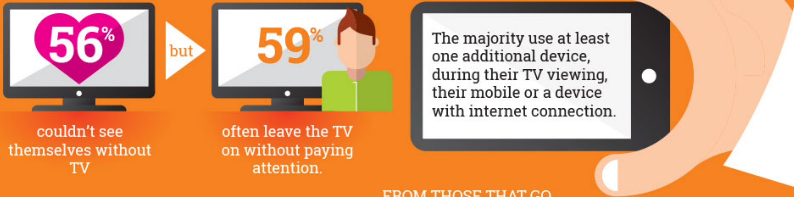


HOW DO SCREENS OVERLAP



	TV	Radio	Internet PC	Mobile Internet	Tablet	Mobile	OOH	Print
TV	100%	90%	84%	83%	84%	88%	88%	90%
Mobile	93%	95%	99%	98%	99%	100%	95%	95%

TV INTERACTION WITH MOBILE AND INTERNET

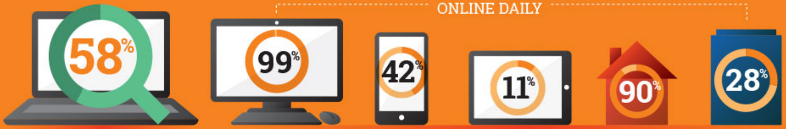


56% couldn't see themselves without TV

but

59% often leave the TV on without paying attention.

The majority use at least one additional device, during their TV viewing, their mobile or a device with internet connection.



58% use the internet as the main place to look for extra info

FROM THOSE THAT GO ONLINE DAILY

99% go online from a PC

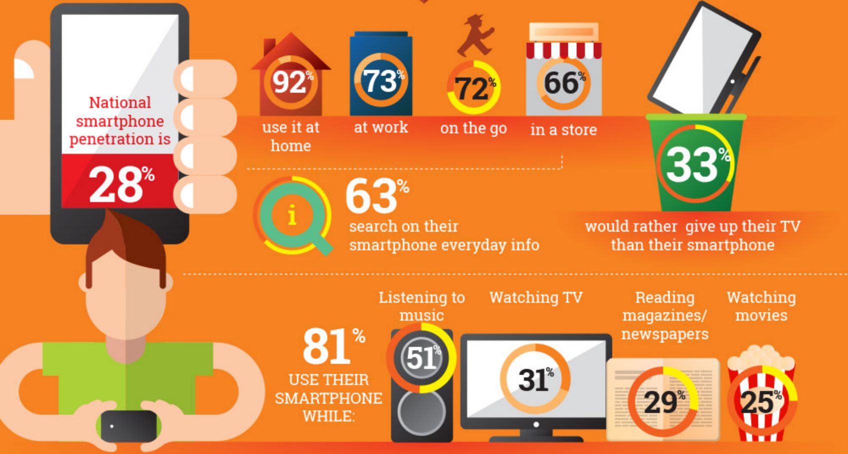
42% go online from a smartphone/ mobile phone

11% go online from a tablet

90% access it from home or on the go

28% access it from work

THE WORLD OF MOBILE



National smartphone penetration is **28%**

92% use it at home

73% at work

72% on the go

66% in a store

63% search on their smartphone everyday info

33% would rather give up their TV than their smartphone

81% USE THEIR SMARTPHONE WHILE:

Listening to music **51%**

Watching TV **31%**

Reading magazines/ newspapers **29%**

Watching movies **25%**

THE WORLD OF APPS

17 apps

installed on average per phone by smartphone on line users

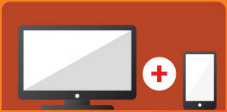
8 apps

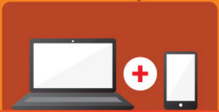
used in last 7 days

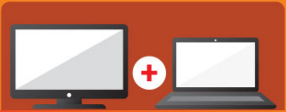
2 paid apps

installed on average per phone

MULTISCREEN COMBINATIONS







WHAT THEY DO ON MOBILE:

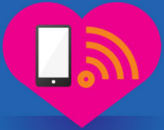
- view, listen to music/ videos
- use email
- access social networks
- use messenger / chat

WHAT THEY DO ON INTERNET:

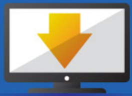
- search info
- use email
- access social networks
- use messenger / chat

FOCUS ON MILLENNIALS MULTISCREENING

WHAT MEDIA THEY CONSUME?

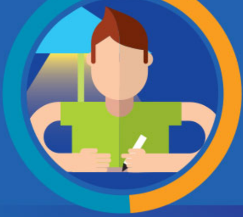


Favorite media channels are mobile and Internet.



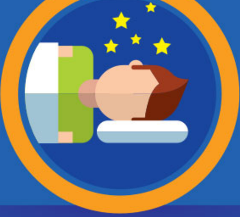
TV has a good penetration but rather low affinity.

A NORMAL DAY FOR MILLENNIALS



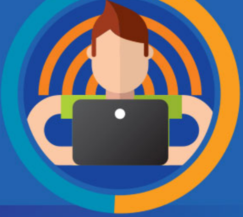
work >= 8h

49%



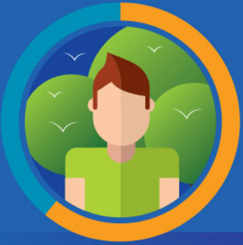
sleep >= 7h

100%



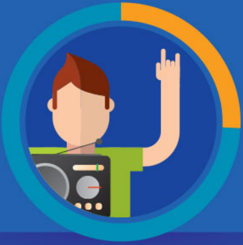
spend online >= 3h

51%



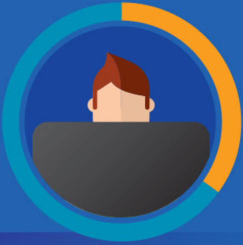
spend time outside >= 3h

61%



listen to radio >= 3h

26%



watch TV >= 3h

35%

27 OUT OF 24 HOURS/ DAY AND PLENTY MULTISCREENING OCCASIONS

	TV	Radio	Internet	Mobile Internet	Tablet	Mobile	OOH	Print
Internet	90%	93%	100%	97%	97%	92%	93%	93%
Mobile	98%	99%	99%	99%	99%	100%	98%	99%

THEIR "SECOND SCREEN" IS THEIR FIRST SCREEN: MILLENNIAL SECOND SCREEN IS DIGITAL FIRST

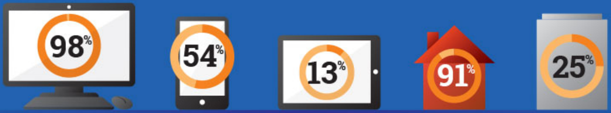
47% of the Millennials couldn't imagine living without a TV

62% often leave the TV on without paying attention

67% say that the Internet is essential in their lives.

76% go online when they need information

FROM THOSE THAT GO ONLINE DAILY



98% go online from a PC

54% go online from a smartphone/ mobile phone

13% go online from a tablet

91% access it from home or on the go

25% access it from work

PCs KEEP THEM INFORMED & ENTERTAINED

PC USE IS MOTIVATED BY:

58% surfing the net;

54% listening to music

48% watching movies

45% playing games

91% of the Millennials have a computer at home:

64% have a desktop

34% have a laptop

4% have a tablet

19 hours/ week

2-3 hours per day.

TIME SPEND IN AVERAGE ON THEIR PC:

SMARTPHONE USE IS MOTIVATED BY:

SMARTPHONES KEEP THEM ENTERTAINED & CONNECTED

17% access

16% chat on

15% view/

15% email

12% make

social networks

mess

listen to music/ videos

photos

98% have a mobile phone

27% have a smartphone

22% show interest for sites with apps for mobile phones.

USAGE CONTEXT:

At home or outside

Communicate & connect to get info quickly.

TABLETS KEEP THEM RELAXED

8% have a tablet

14% intend to buy a tablet in the next 12 months

11% go online from their tablet on a regular base

USAGE CONTEXT:

Primarily use at home

Relaxed and leisurely approach

Tablet users are a device-dependent group, and they are not abandoning legacy devices as they add new technology to the mix.

IT IS NOT ONLY ABOUT DEVICES. THEIR SECOND SCREENS ARE...

CURIOSITY SPACES

WIKIPEDIA
GOOGLE
IMDB/ CINEMAGIA
SHAZAM
YOUTUBE

SOCIAL SPACES

FACEBOOK
TWITTER
SOFTPEDIA
TPU
EVA/ KUDIKA

DEDICATED SPACES

ROL
STIRILE PROTV/ PROTV
REALITATEA
GANDUL
LIBERTATEA
GSP
SPORT

MULTISCREENING HAS FOUR KEY DRIVERS:

TO SATISFY CURIOSITY

Immediate gratification of content inspired intrigue

Eg. Imdb artist/ movie search, Shazam music search, Wikipedia topics

TO SOCIALLY CONNECT

Real time engagement with others sharing passions

Eg. Fan apps, twitter following, show apps

TO UPSKILL

Learning & deepening knowledge around content passions

Eg. Recipes, sports statistics, healthy eating

TO BE RECOGNISED

Gaining recognition for viewing behaviours

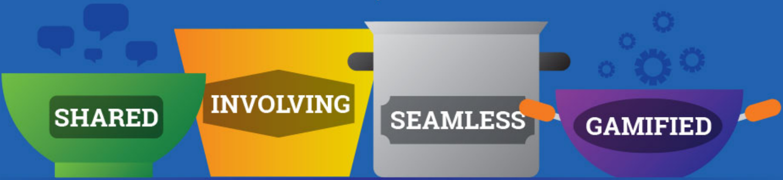
Eg. Reward apps for viewing

MILLENNIALS MULTI SCREEN TO MAKE THEIR VIEWING EXPERIENCES BETTER

PARTICULARITIES OF MULTI SCREENING ARE:

- **Content led** vs device dependent
- Purposeful play & interaction
- Enhancement to an existing behaviour
- Passion based - not for every show

THE KEY INGREDIENTS OF A "BETTER" VIEWING EXPERIENCE VIA MULTISCREENS



A connected experience with other fans like them. Following social reactions in real time.

Direct interaction with or impact on show content eg. Voting, tweeting.

Instantly enhanced by deeper information on content

Playing along with game shows.

TOP 5 MULTI SCREENING LESSONS FOR BRAND EXPERIENCE DESIGN:

THE VIEWING CONTENT IS THE MAIN EVENT NOT YOU

Always enhance, never distract

THERE IS VALUE BEYOND THE VIEWING OCCASION

Use second screens to transfer & share valuable related content that lasts beyond the broadcast

UPSKILLING IS A KEY DRIVER OF MULTISCREEN BEHAVIOUR

Use multiscreen occasions to impart knowledge and expertise

BE CREATIVE, NOT GIMMICKY

People are much more likely to engage if the content is ground breaking

MAKE SURE IT PASSES THEIR VALUE TEST

Use the occasion to meet their needs, not just yours or risk being ignored

Ask for details from consumer@ro.starcomworldwide.com