



MULTI-SCREEN ADVERTISING

Unveiling Cross Platform Advertising Solutions



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We are living in a connected, digital world that just a decade or two earlier could only have been imagined. A relentless stream of powerful new handsets, tablets, PCs and televisions is enriching the lives of hundreds of millions of individuals. Increasingly, consumers will not be satisfied with a single screen experience and instead will expect content to be seamlessly delivered across multiple devices and screen types.

This trend offers opportunities and challenges for the media industry. On the one hand, the number of consumer touch points is on the rise offering new advertising and content monetization opportunities. In fact, online video ad spending is projected to surpass US \$11 billion globally by 2016¹. But on the other hand, the multi-screen world introduces new technical complexities the media industry has not previously faced.

With their large subscriber base and access to consumer data, Telco-Media companies are uniquely positioned to help marketers thrive in a multi-screen world. This paper presents a framework for multi-screen ad management that drives deeper and more meaningful consumer engagement. The framework helps Telco-Media companies grow revenues while delivering greater value to marketers.

Introduction

Rich media and gaming applications have become an everyday part of the consumer's life. Consumers no longer want to simply be connected. They want a media experience that enables them to consume 'whatever they want, whenever they want' irrespective of the device or medium.

This new generation of consumers is sensitive to advertising and is not receptive to invasive pitches - particularly for products that are not relevant. This means advertising executives have to rethink their media plans as well as how they view their purchase funnel. Though this increases the complexity of media planning and analysis, it also offers marketers an unprecedented opportunity to target audiences with a unified experience that will generate significantly more value than traditional approaches.

To embrace this opportunity, marketers need to understand:

- The characteristics of consumers who are watching multi-screens
- The nature in which multi-screens are accessed
- A strategy to leverage the unique attributes of a multi-screen environment to optimize marketing strategy and maximize ROI

The adoption of a multi-screen marketing strategy can expand the reach of advertisers, help them achieve innovations in campaigns and enable entirely new business models.

Emergence of the Multi-Screen Digital World

Research has documented the emergence of the multi-screen world. Consider some of the evidence we've gathered. According to a study from Google, 90% of users who move between devices do so to accomplish a goal². While watching a TV show on a large LCD television, they may react to it on a social network using a smartphone; or adjust the recording settings of their DVR with a tablet. These activities are no longer restricted to a

DESCRIPTION	PC (DESKTOP AND LAPTOP)	TV	MOBILE	E-READERS AND TABLETS	GAMING CONSOLES
Device Consumption Attributes	Forward leaning with applications such as office productivity, search, blogging, product research, purchasing and more	Predominantly backward leaning with very limited interactions or activities	Forward leaning with activities that include social networking, instant messaging, email and increasingly, mFinance	Forward leaning with activities that include newspaper and magazine subscriptions, books and videos	Predominantly backward leaning with activities that include playing games, watching DVDs / Blu-Rays, listening to music
Device Influence on Product Purchasing	Strong influencing factor in purchase decisions (specially branded products)	Influences brand recall and drives the user to search for more information before purchase	Influences at the point of purchase through deals / offers and price comparisons	Influences shopping experience through product reviews and enables purchase	Minor influence on brand recall
Interactivity of Device	2-way communication and highly interactive	Limited 2-way communication, but changing with the rise of smart TVs and cloud-based Set-Top Boxes	Immersive 2-way communication, especially through location-based services	Rich interface induces interactivity, an excellent option for those on the go	Interactive; growing popularity of online gaming, and streaming services
Consumer Perception of Device	Productivity, Information and Entertainment Almost 8 in 10 American users aged 13-24 have responded to an online ad's call to action ⁶	Infotainment Vast reach and an important component of media mix for any promotion	Information and Entertainment Smartphones account for 38% of consumers' daily media interactions according to a survey by Google and Ipsos in 2012; enable consumers to connect on-the-go and get quick feedback ⁷	Entertainment and Lifestyle Device Score high on cool factor and convenience 39% of owners purchase physical goods on their tablets; 7 in 10 play games ⁸	Entertainment Device Enhanced by touch, gestures and voice recognition 76% play games online versus only 64% of the general population ⁹

Figure 1: Multi-Screen Consumer Behavior | Source: Wipro Technologies

single screen. According to Forrester Research, 18% of tablet owners connect their tablets to their TVs³. By the end of 2015, DisplaySearch forecasts that over half a billion connected televisions will have shipped to consumers⁴. And finally, a report from Ericsson found that 35% of iPhone and Android users admit to using non-voice applications before they even get out of bed in the morning⁵. The popularity of the multi-screen experience is poised to dramatically change content consumption habits, with far reaching implications for marketers as well as Telco-Media companies.

In the table below, we have analyzed the key features of multi-screens, across various consumer experience characteristics.

According to research by Microsoft on the behavior and attitudes of multi-screen consumers, adults aged 18 to 34 find more value in multi-screen experiences than adults in the 35 to 64 age range¹⁰. Multi-screens enhance the content consumption experience for this younger market segment. Naturally, a younger generation that can afford multiple, connected devices and is actively engaged on social networks is a desirable advertising target.

The advance of technology has blurred the line between content and commercialization. This has led to a growth in consumer acceptance of advertising and marketing programs; as long as it is done well. For instance, multi-screen consumers are often willing to share their personal information to ensure they get more relevant coupons, deals and offers.

Implications for Multi-Screen Advertising

As today's consumers demand pervasive connectivity and accessibility, it is imperative for marketers to integrate a multi-screen strategy into their plans. Success will yield the following benefits:

- **Increased brand awareness** creating a competitive edge in the market. A study conducted in Nielsen Media Labs proved that for groups that saw a specific ad across multiple screens - TV, PC, smartphone and tablet - the brand recall jumped dramatically to 74%, versus 50% for TV only¹¹.
- **Influence the consumer's brand association and buying behavior** by constantly engaging them with meaningful dialogue and branded experiences. For instance, media buys should target the second screen that consumers use to search and shop during commercial breaks. Marketers, along with publishers, agencies and networks, should provide timely and compelling consumer experiences for specific mediums, at a specific consumer touch point.
- **Drive the purchase intent** as 78% of multi-screener choose higher-valued products or services as a result of digital media versus 66% of non-multi-screener according to one study¹².

Smart marketers understand that consumers have begun to control brands. In this scenario, it is wise to listen to consumers while gently persuading them every now and then. Telco-Media companies can play a key role in driving multi-screen conversations with consumers. In the process, multi-screen advertising can generate enormous benefits for Telco-Media companies in the form of new revenue streams and strong competitive differentiation.

Leveraging the Multi-Screen Advertising Opportunity

Campaign planning and management in the new and complex digital media ecosystem can pose a critical challenge for brand marketers and agencies. Marketers need to understand how their brands can stay ahead of the curve by effectively building multi-touch cross-media campaigns. With their vast subscriber reach and access to subscriber data, Telco-Media companies can help marketers navigate the changing dynamics of a multi-screen world. This section presents the key elements of building effective multi-screen advertising strategies. These include:

- Multi-Screen Touchpoint Identification
- Ad Targeting
- Ad Innovations
- Ad Delivery
- Privacy Protection

Each of these elements is explored in greater detail in the following sections.

I. Multi-Screen Touchpoint Identification

Marketers need to understand the perceptions and usage patterns of multi-screens in order to optimize spend allocation. Typically, marketers focus brand planning efforts and investment on the medium that has mass reach – most often, TV. Even in cases where they pick both TV and online video, the focus is often skewed heavily in favor of TV. However, marketers must recognize the amplifying effect of the online medium. Those who watch online ads tend to research the product further, discuss it with friends, and end up transacting.

With multi-screens gaining popularity, marketers need to provide a unified experience across screens. Multi-screen consumers are more likely to make a purchase after viewing an ad if it provides a unified experience. For example, Reebok as part of their multi-platform approach experienced a 131% lift in brand response conversions after extending its video creative across all digital screens - PCs, mobile phones and tablets - to promote a specific product line¹³.

Telco-Media companies can leverage their access to consumer homes and devices to deliver data-driven insights on multi-screen consumer behavior. These include insights on time of use, device preference by type of activity, and patterns in media consumption by customer segment. These insights can serve as the foundation for building unified cross-screen advertising strategies.

II. Ad Targeting

To create high-impact multi-screen campaigns, marketers need to align multi-screen ads with their desired market, just as they do for TV ads. Relevant and personalized communication that complements the user experience will increase multi-screen ad effectiveness. This requires marketers to expand their targeting capabilities to address the digital medium. Marketers should go beyond demographic profiling and target

users based on specific interests and behavioral patterns. For example, social graph targeting can help marketers target users based on their social network footprint including interests and connections. Users can also be targeted based on content, keywords and hash tags, shared on social networks.

With the growth in content consumption on mobile devices, Telcos can help marketers reach the right customer at the right time based on their knowledge of customer location data. In addition, new media companies such as social networking service providers can dramatically increase the impact of multi-screen ad campaigns with their understanding of consumers' social networking usage behavior. Together, media companies and telecom service providers can add enormous value in the delivery of targeted ads.

III. Ad Innovations

In the midst of ad blockers and opt-in features, consumers prefer advertising formats that are personal, contextually relevant and enable real-time interactions in fulfilling their needs. To be effective, marketers need to make sure ad content and messages are relevant to the consumer who sees it. The proliferation of 4G mobile networks and an all-IP world provides wider scope for ad innovations, such as those indicated in Figure 2. In-page executions, pre and mid rolls, mobile video ads and overlays, in-app ads and campaigns with a clearly defined call for action are a few of the formats attracting major video ad spends. To appeal to multi-screen users, ads need to be interactive and searchable, with actionable items across medium or devices such as ratings, reviews and recommendations. In order to generate high click-through rates and better conversions, marketers are opting for rich media ads that use html-enhanced banners, sophisticated animation, audio and video to create compelling experiences. Marketers need to simultaneously ensure that such formats are non-intrusive to the user.

While an all-IP network allows Telco-Media companies to offer new content-based services, it can also help marketers deliver ad innovations.

IV. Ad Delivery

The Digital World has spawned new systems of ad delivery. Systems such as ad networks can increase marketing ROI by providing more efficient pricing and increased audience reach. Demand Side Platforms (DSPs) can help further streamline the ad delivery process by optimizing ad placement in real-time across multiple inventory sources. Telco-Media companies should embrace these systems in order to help marketers build more effective digital marketing campaigns.

V. Privacy Protection

All stakeholders involved in multi-screen ad delivery need to proactively address users' privacy concerns and commit themselves to protecting consumer data. This is a key to helping consumers overcome privacy fears, and will in turn be instrumental in driving the success of multi-screen advertising in the long term.

A Proposed Path to Building Multi-Screen Advertising Campaigns

In this section, we present a framework for a multi-screen ad platform that allows Telco-Media companies to help marketers deliver targeted, personalized ads. The platform enables Telco-Media companies to understand whom they are reaching with their non-addressable primary screen, mainly television, while strategically controlling reach and frequency with addressable digital media. The core components of the framework include:

Integrated Inventory Management. The proposed ad platform provides increased accuracy and visibility across a set of complex, overlapping



Figure 2: Multi-Screen Ad Innovations | Source: Wipro Technologies

products. The platform also offers a workflow management system that organizes communication from ad sales to ad traffickers and enables them to schedule campaigns seamlessly.

Integrated Ad Management. The platform is enhanced with a dynamic ad engine that enables real-time decisions and directs relevant advertising and content to customers by mapping content with customer data. The platform offers anonymous digital consumer targeting databases reaching a national audience. In addition, it provides digital advertising technology to reach video audiences at a national scale, with repurposed TV or other creative.

Integrated Analytics. The platform offers an advanced algorithm for optimization that evaluates ad performance in near real-time with complex business rules and prioritizes communication and creative packaging.

Single Dashboard. The platform provides a single dashboard for campaign management. The dashboard helps marketers take appropriate action and innovate with new formats and positions to provide a unified experience to consumers.

The benefits of a multi-screen ad platform include:

- Rich profiling of consumers to enable precise consumer targeting
- Unified experience to the end consumer to increase brand recall
- High levels of brand interaction that increase the brand loyalty index
- Increased ROI metrics and flexibility to experiment with campaign variables as part of optimization efforts
- Strong influence over the purchase intent and attribute weighting of the medium and channel that yields better conversions

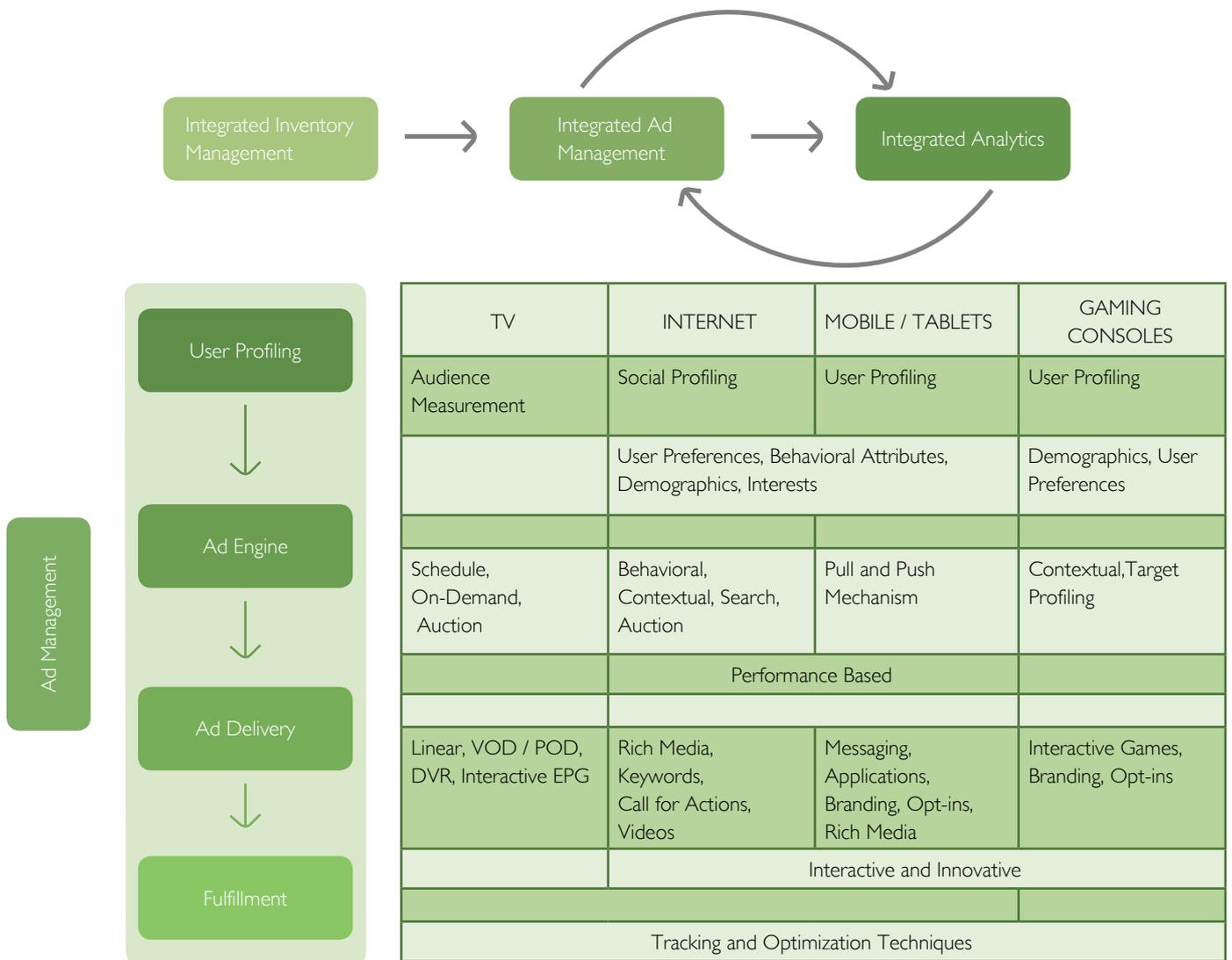


Figure 3: Framework for a Multi-Screen Ad Platform | Source: Wipro Technologies

Driving Integrated Outcomes

One of the major issues facing the digital advertising ecosystem is measuring the outcome of an integrated campaign. Paid search and display advertising are converging and industry bodies and agencies are attempting to define unified measurement metrics across media as part of their integrated advertising efforts. However, ad systems in use today were built prior to the advent of online video, social media, and search. The effectiveness of product placement and ad integration with online video and social media is difficult to measure quantitatively with a third-party ad serving system as the only metrics that can be gathered are those derived using click-tags.

We see a strong need for measurement platforms that will allow marketers to understand intent harvesting, generation and creation in an integrated manner. From planning to ad sales, inventory management, serving and measurement, we believe that optimal touchpoint analysis is essential to determining the relationships between digital, video, search, social and beyond. This requires the integration of complex ad systems to generate data driven plans, optimize media messaging and creative treatments and pave the way for attribution modeling. In addition, data warehousing can be used to manipulate data to understand the relationship between touchpoints beyond the “last click”.

Conclusion

A multi-screen strategy is a necessity. Brands are expanding their reach with this strategy and also generating accelerated ROIs with the right media mix. With a little extra time and effort put into audience targeting to core demographics, advertisers can coordinate their digital and mobile campaigns with their appearances on TV, greatly increasing the likelihood of a sale sparked by those appearances.

As consumer media and technology behaviors evolve, the culmination of market forces will drive the realization of an enriched, multi-screen experience to make interactive advertising a compelling revenue platform. We believe that with their access to vast amounts of consumer data, Telco-Media companies have a unique opportunity to shape multi-screen brand conversations. The strategies and the proposed multi-screen ad platform presented in this paper can help Telco-Media effectively leverage the multi-screen advertising opportunity.

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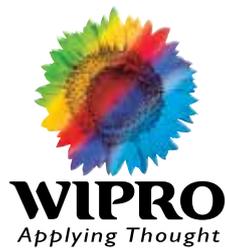
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