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meet the Screens

all screens are not created equal

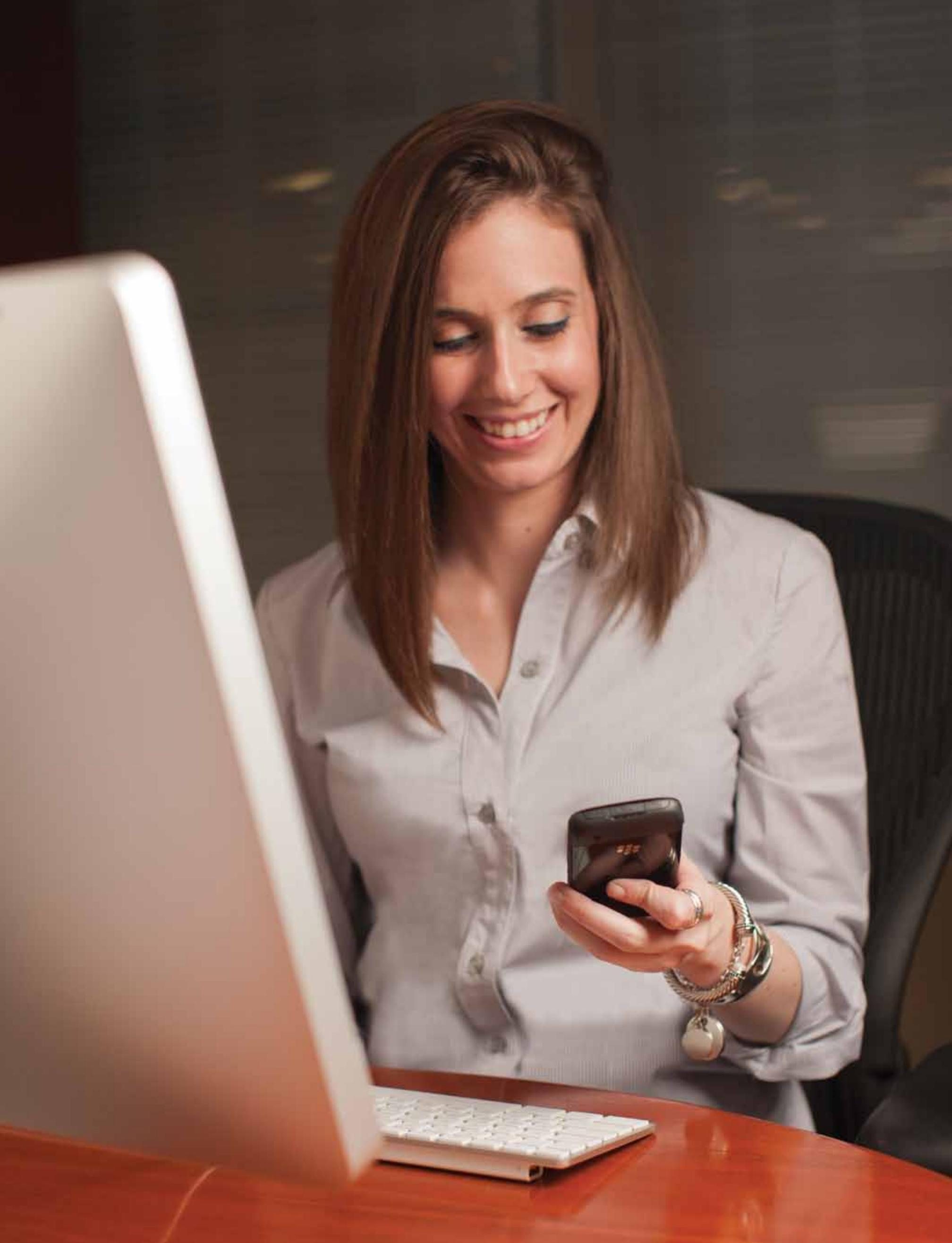
Not long ago, there was just one screen in our lives. The TV. It was front and center in the living room; everyone surrounded it at predetermined times.

Now screens *surround us* – they're on our desks, in our laps, in our pockets. They're in airports, on airplanes, in cabs, in grocery store aisles, and on gas pumps. We're entertained by them, informed by them, challenged by them, connected by them. We watch them, write on them, work on them and play on them.

In fact, screens are so ubiquitous, we don't think or feel much about them.

Or do we?

Are screens just sheets of glass that deliver content? Or are they something more? Do they have distinct personalities? Do consumers feel differently and interact differently with different screens? And, as marketers, should the content we create be tailored to the screen on which it will appear?



so many screens, so little information

Screens outnumber people on earth. By a lot. So you'd think this would be an area rich in data and understanding. But the study we undertook had never been done before.

These are the kinds of things we wanted to know:

how do people around the world engage with, socialize around and add value to their lives with different screens?

do consumers from emerging economies, like Russia and China, view TV differently than consumers in developed markets, like the United States and the United Kingdom?

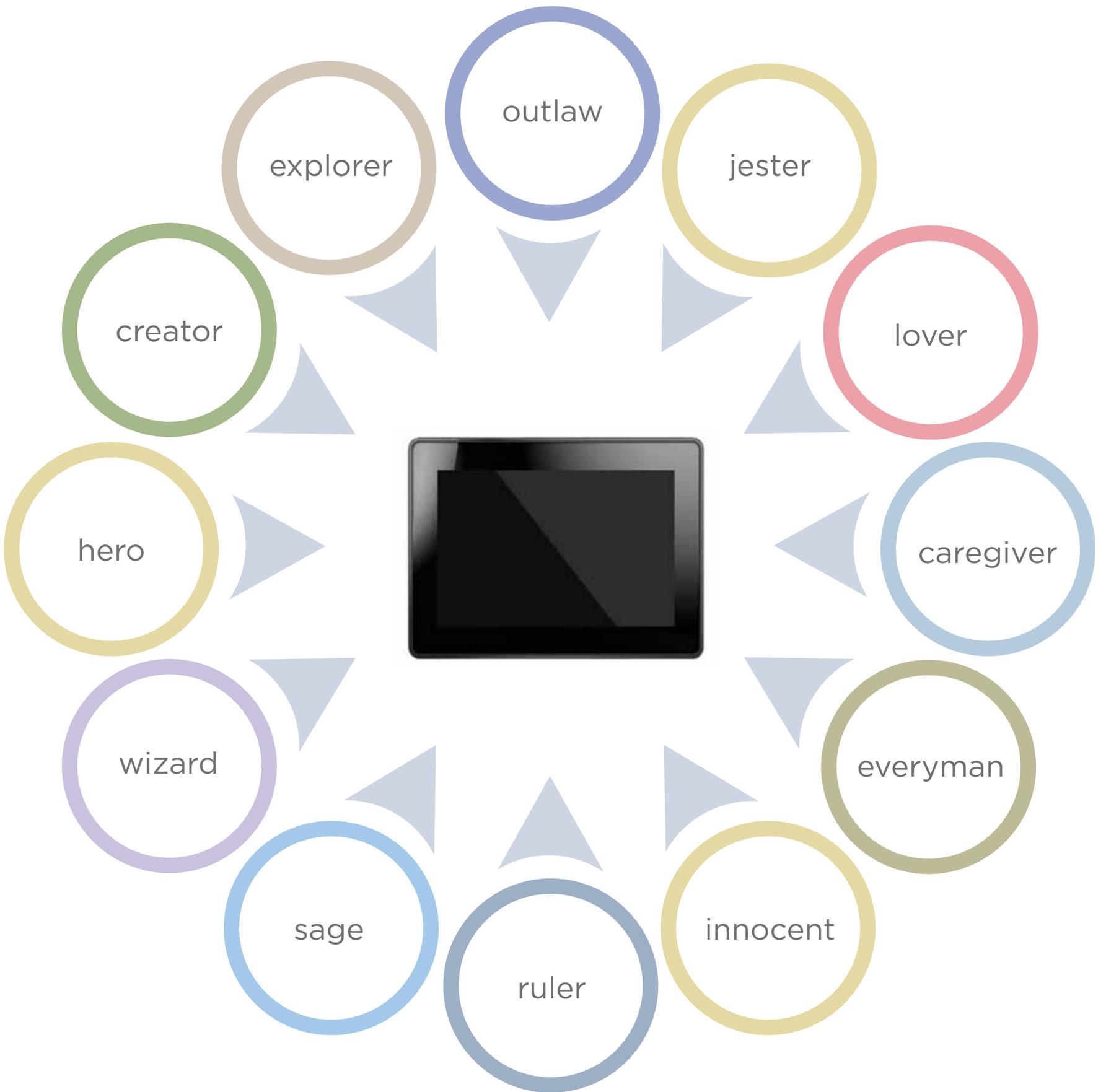
what's the difference in how a 17-year-old student in Shanghai and a 55-year-old executive in Manhattan view their smartphones?

Our investigation took us to five countries: the United States, the United Kingdom, Saudi Arabia, Russia and China. In each country, we conducted a quantitative study with 300 subjects, ranging in age from 18 to 64. Qualitatively, we spoke to dozens more people around the world, often for days at a time.

we learned immensely.

And gained more insight than we could have even hoped for.

We didn't know what to expect going into this. But coming out of it, we're sure that you will never look at – or produce content for – these screens the same way again.



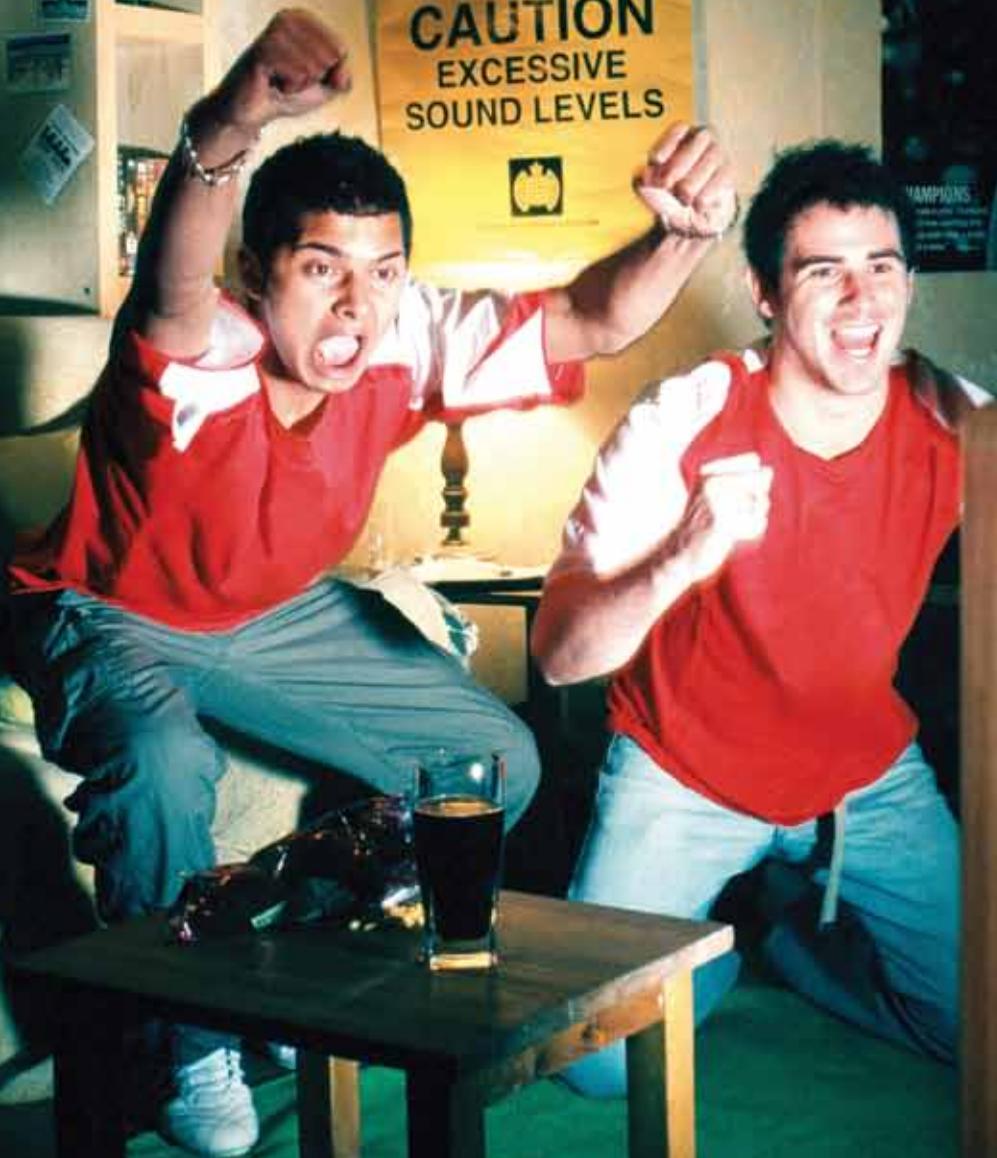
“If this screen were a person, it would be a _____.”

Assigning characteristics and personalities to different objects and people creates something called **archetypes**. Pioneering psychiatrist Carl Jung used archetypes to better define and understand personality and behavior in humans. We used archetypes to do the same for screens.

In our study, consumers were probed about the roles different screens play in their lives and were asked to describe the bonds and connections they felt with those screens. Interestingly, different screens came to embody distinct archetypes that were common among the consumers who use them.

People don't view screens as tabulae rasae, mere sheets of inanimate glass through which content is consumed. Rather, each screen has its own characteristics and its own relationship with the consumer. Additionally, each screen brings its own agenda to the content that appears on it.

That means that on each screen, there's an archetypal subtext to the conversation a marketer is having with a consumer. It's no longer just what you say or how you say it that's important. It's what screen you say it on. Messaging can be much more effective if it's customized for the screen on which it appears.



the tv: everyman & the jester

The TV screen fits two distinct archetypes. The first is **Everyman**. Consumers' relationship with their TV screens is like that with an old friend. TV is a regular guy/gal, part of the family. You've seen it naked. You've heard it burp. You grew up with it and are comfortable around it.

The TV screen is also endlessly entertaining like **The Jester**. It's chatty and interesting. It makes you laugh and cry. It's done a lot, seen a lot and wants to tell you all about it.

When people are with the TV screen, they are open and passive. It's a one-way relationship; they expect to be entertained.

So, TV is a great place to **tell stories**. Consumers will go where you take them, willing to explore and discover. They're open to feeling something and forming a close emotional bond.





zoom out for a global perspective and it gets even more interesting.

Consumers in the United Kingdom and the United States have this **strong friendship** with TV. They trust it and enjoy spending time with it. Nostalgia plays an important role, too. TV was their first and – for many years – only screen.

go to the other side of the world and it's a different story.

In Russia and China, TV was state owned and controlled. So while consumers are used to having it around, they're wary of it and less trusting. Over time, this may change. Meanwhile, **entertainment**, rather than rational information, may be more readily accepted on TV screens in these countries.

relationships with TV also vary by age.

Those over 45 prefer TV for viewing content. Watching programs and movies on a TV screen is more relaxing than watching on a computer.

Among younger consumers, though, the relationship is more **casual**. The TV screen is a friend, but one they may be losing interest in. Getting content on other screens is accepted and often preferred.

Marketers: *When people of any age are viewing a TV screen, they are open and passive. **It's a one-way relationship.** They expect to be entertained. TV is a great place to tell stories. Consumers are open to feeling something and forming close emotional bonds.*

百TVゲーム&DVDビ

10月
鬼特価
27
50
150



買取価格案内

PlayStation 2	¥2500	PlayStation 2	¥4200
PlayStation 2	¥2500	PlayStation 2	¥4500
PlayStation 2	¥2000	PlayStation 2	¥4800
PlayStation 2	¥2400	PlayStation 2	¥5000
PlayStation 2	¥2500	PlayStation 2	¥4200
PlayStation 2	¥2000	PlayStation 2	¥2000
PlayStation 2	¥18000	PlayStation 2	¥3000
PlayStation 2	¥9500	PlayStation 2	¥2400



Percentage of U.S. homes with three or more TV sets:

66



“An unconditional friend to kill time with, break free, and not expect anything in return.”

Mexico

“It’s someone to hang out with when there’s no one else around...it keeps me company.”

United Kingdom

There are over 1.5 billion television sets in use in the world.

Men and women tend to watch TV with different people: men are more likely to watch TV with just a spouse or partner, while women are more likely to watch with just a child or children.

Number of hours per day that TV is on in an average U.S. home: 6 hours, 47 minutes

Number of TV sets in the average U.S. household:

2.44

“You don’t have to try too hard with (a TV). At the end of a hard day, you just enjoy yourself...”

United Kingdom

Over \$189 billion will be spent on television advertising globally in 2011.



“...whenever I’m down...
whenever I’m bored...
whenever I don’t have
anything to do, one of my
best friends is a TV.”

Saudi Arabia

Percentage of U.S.
households that possess
at least one television:

99

“A big fellow that occupies a
whole lot of space...pays no
rent, and costs me a lot of
money...but it keeps me
entertained when there’s no
one else to hang out with.”

Singapore

Percentage of Americans
that regularly watch
television while eating
dinner:

66



More than half of those who watch TV (52%) usually do so socially - with other people. This is especially true for those living in multi-person households, 63% of whom usually watch TV with others.

“Entertaining...comforting...
fun...engaging...”

United Kingdom

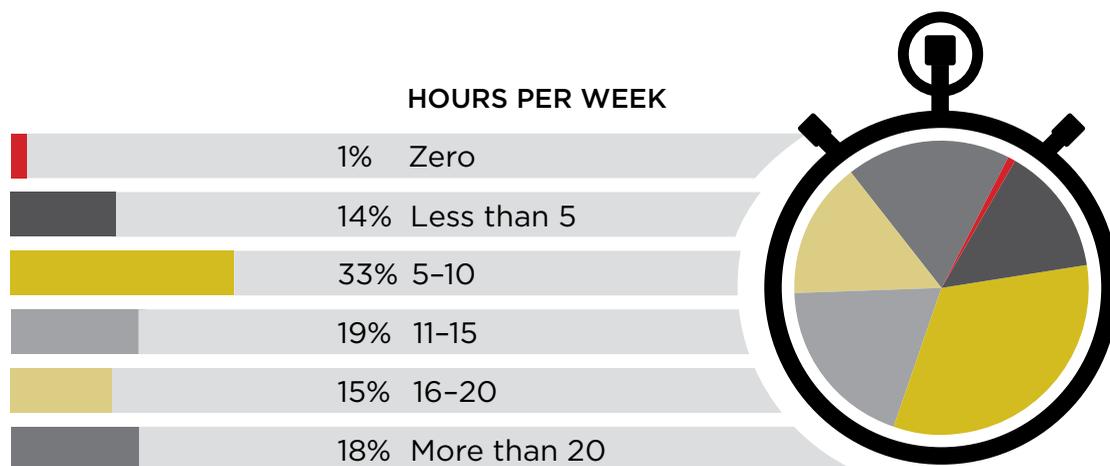
“...he can inform you,
entertain you, and show
you a good time.”

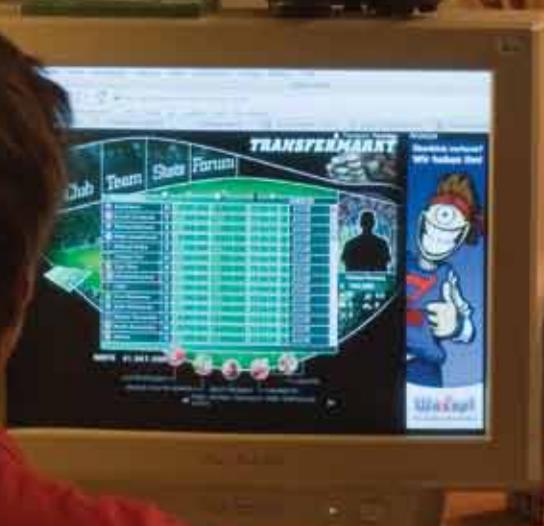
Mexico

Number of hours of TV
watched annually by
Americans: 250 billion

Value of that time
assuming an average wage
of \$5/hour: \$1.25 trillion

HOURS AMERICANS SPEND PER WEEK WATCHING TV





the pc: the sage

The PC screen is something to learn from and look up to. It's far more trusted than TV, especially in Eastern countries and among younger consumers, because they can control/choose its content. It can answer practically anything. It knows all, like a great, wise teacher, **The Sage**.

Unlike TV, though, the relationship with the PC screen is **two-way**.

The user engages with it, and gets advice and information in return.

The Sage helps its user build personal equity and self-esteem.





Consumers interact with The Sage the way they would with an older sibling: it's someone to look up to, someone who's smarter than they are. Thus computers provide a feeling of support beyond what TV (a friend) can: it **empowers** its user to compete and interact, giving them an edge.

again, though, geography changes everything. In countries where freedom and personal control have long existed, TV – the everyman/jester/old friend – is more trusted. In Russia and China, where, historically, TV has been viewed with skepticism, The Sage is **more trusted**. The stronger relationship with the Internet-connected PC in these countries reflects having more control over what is being viewed compared to the “pushed” content of TV.

Marketers: *It's not enough to run a passive display or image ad in order to connect with computer users. Deliver content that educates them and helps them fulfill their potential. **Challenge them** and give them opportunities to show what they've learned. Who doesn't want to show off that they're sharper, smarter and better... thanks to The Sage?*

现场演示

怡和餅屋
YI HO BING WU



The number of PCs sold globally will grow from over 222 million in 2010 to over **479 million** in 2015.

“...sometimes it’s my guardian angel...when I’m not sure what to do, I consult my laptop.”

Singapore

Percentage of consumers who own PCs in the U.S.:

83



The Commodore 64 was the best-selling personal computer of all time, with **17 million** units sold.

“Whenever I need to refresh my memory about anything or if I want to learn anything new, it’s always there.”

Saudi Arabia

For the first time ever, China became the world’s **biggest** consumer of PCs during the second quarter of 2011.



Percentage of consumers who own PCs in Brazil:

57

“My computer is a massive source of information for me...it is like my fountain of knowledge...”

United Kingdom





“What kind of person would it be? Albert Einstein.”

Saudi Arabia

“It’s kind of like a teacher in some ways...knowledgeable.”

United Kingdom

Percentage of consumers who own PCs in Western Europe:

89

In 1980, the U.S. accounted for nearly 70% of all PCs in use and, in 2010, its share declined to 20% representing over 280 million PCs in use.

As of June 2008, the number of personal computers in use worldwide hit one billion, while another billion is expected to be reached by 2014.



“...it helps you to...make the right decision...”

Russia

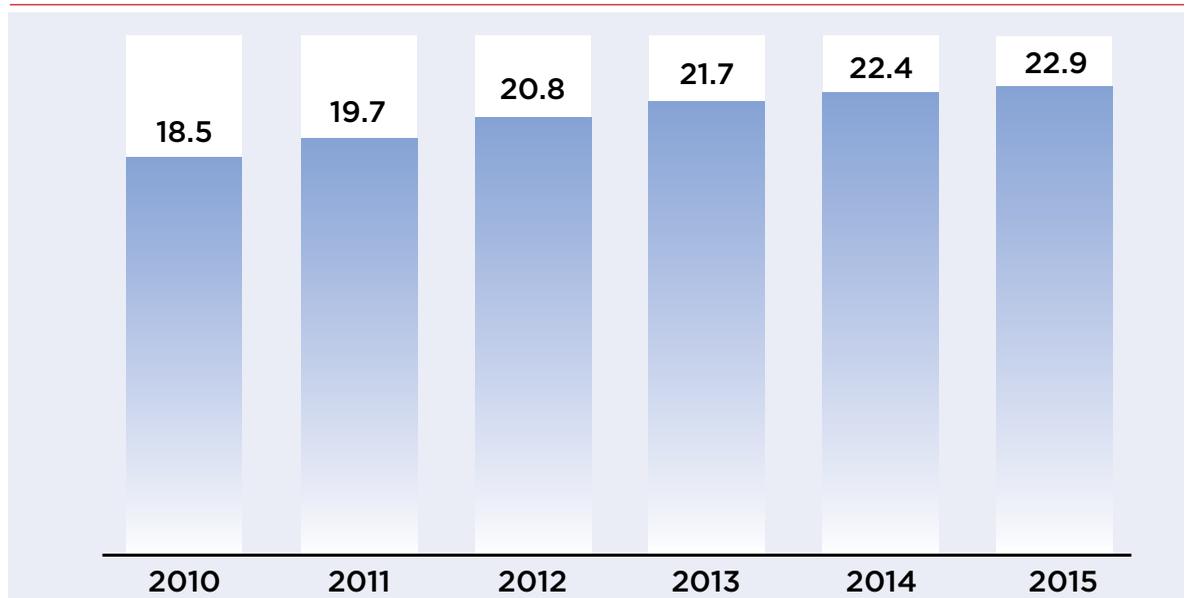
Percentage of consumers who own PCs in Russia:

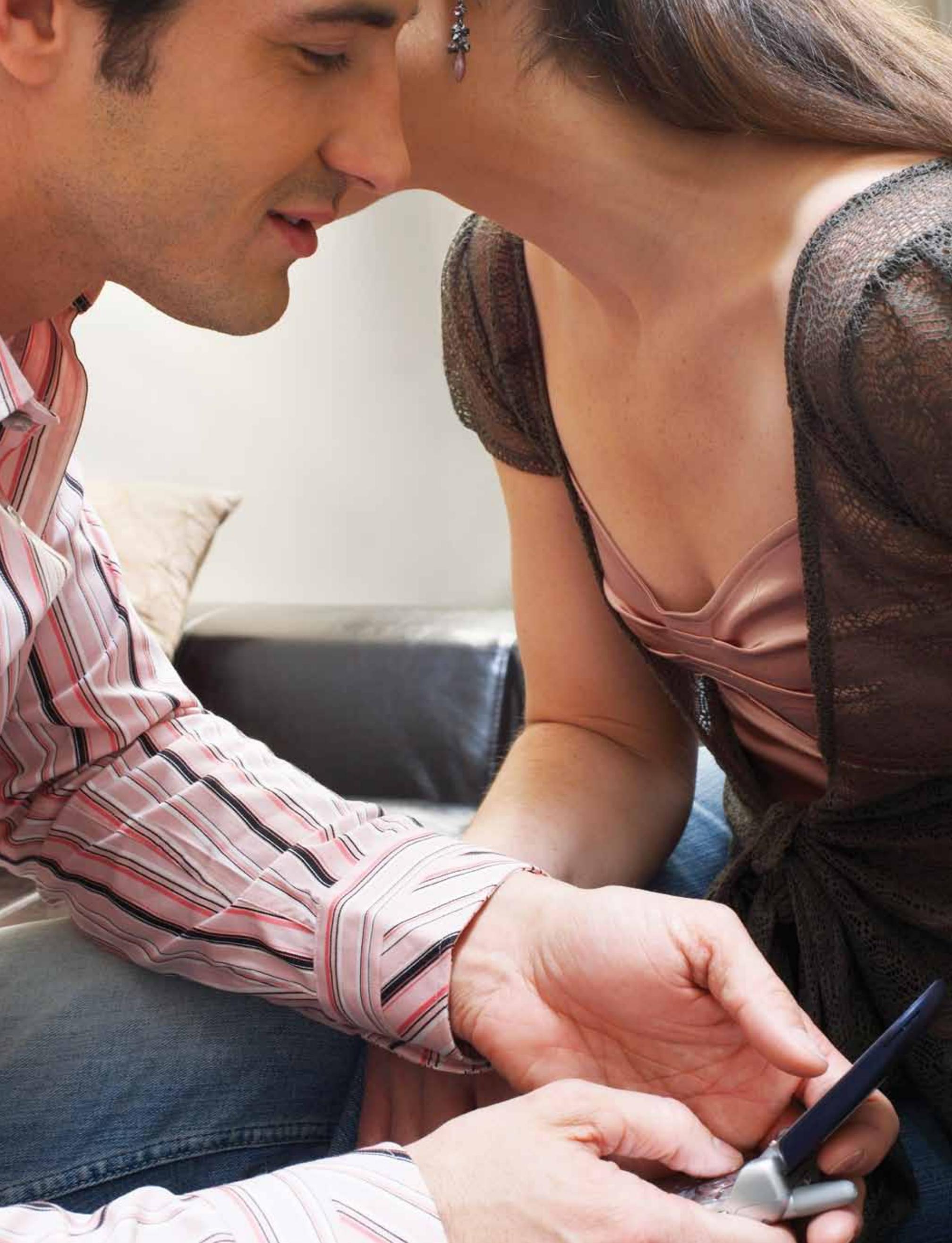
72

“A person who knows a little about everything...it’s very informative.”

Saudi Arabia

U.S. TEEN ONLINE VIDEO VIEWERS, 2010-2015, IN MILLIONS





the mobile phone: the lover

Consumers have the most **personal** and **intimate** relationship with their mobile phone screen. It embodies the characteristics of a lover and engenders feelings of great affection while demanding intense closeness.

The relationship is one that's just beginning and is flush with all the promise and excitement of a new love affair. There's a whole world to explore with this new lover; each day is a new adventure. Consumers don't want to be apart from their mobile screen and can't keep their hands off of it.

It's the last device they look at before they go to bed. The first one they reach for when they get up. It goes everywhere with them.

Everywhere.

Among younger and older consumers, we saw that closeness to TV and the PC is inverse. This is not the case with the mobile screen. Regardless of age, consumers are closest to mobile phones across the board. **A lover is a lover!**





the relationship with The Lover is the most informed, the most demanding, and the **most sensitive**. There's a trust not to be broken. Because of this, consumers are least receptive to receiving advertising via their mobile phones. They don't want advertisers to violate their lover. They don't want mass and crass intruding on their relationship.

which is not to say they're totally against commercial content on their mobiles. It's just that their expectations are much higher. After all, if you are my lover, you know me **intimately**. And if you know me intimately, you know what I want. You won't communicate things I don't care about or don't like. And if you do, if you violate that relationship, well...we all know the consequences of crossing a lover.

Marketers: *Mass communication is not the way to engage with a consumer on a mobile phone. You must know the consumer intimately and use the mobile phone to provide them with **true utility** and value. Give them what they need and help them stay on top of their lives. Then your brand will start to live up to the expectations they have of a lover.*





“...a mobile phone would know all about you. It’s a one-on-one thing.”

United Kingdom

Brand spending on mobile advertising will grow from **0.5 percent** of the total advertising budget in 2010 to over **4 percent** in 2015.

“It is one screen that you, obviously, don’t share with anybody else.”

Singapore

Mobile ad revenue will be \$3.3 billion in 2011. This will skyrocket to **\$20.6 billion** in 2015.

On average, Americans spend 2.7 hours per day socializing on their mobile device. That is twice the amount of time they spend eating and over one third of the time they spend sleeping each day.

“My lover.”

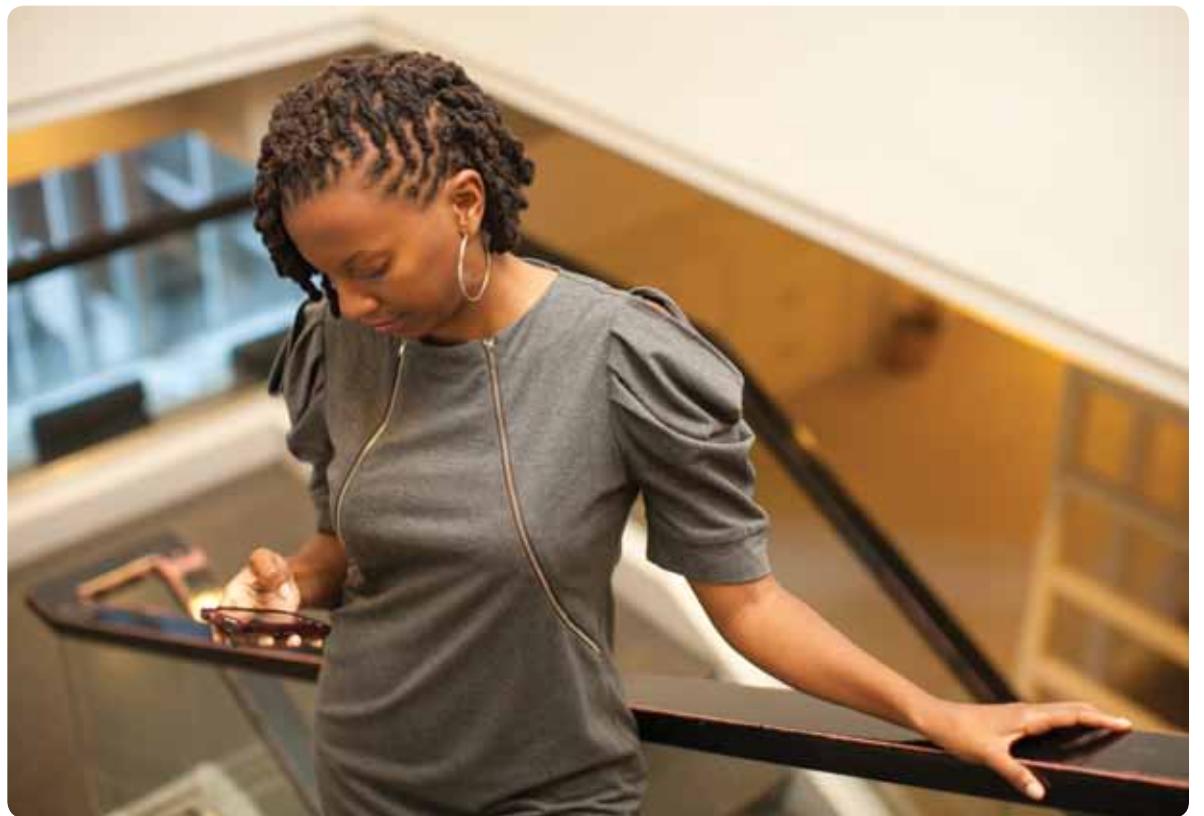
United Kingdom

Percentage of mobile Internet users who are using their devices while watching TV:

86



Women aged 35 to 54 are the **most active** group in mobile socialization.



“When I leave it behind, my world stops.”

United States

“It knows me very intimately... and it pretty much controls my life.”

United Kingdom



One in three U.S. mobile phones is a **smartphone**.

“I rely on it so much...it’s a bit of an obsession as well.”

United Kingdom

Percentage of the world’s population that now has a mobile phone:

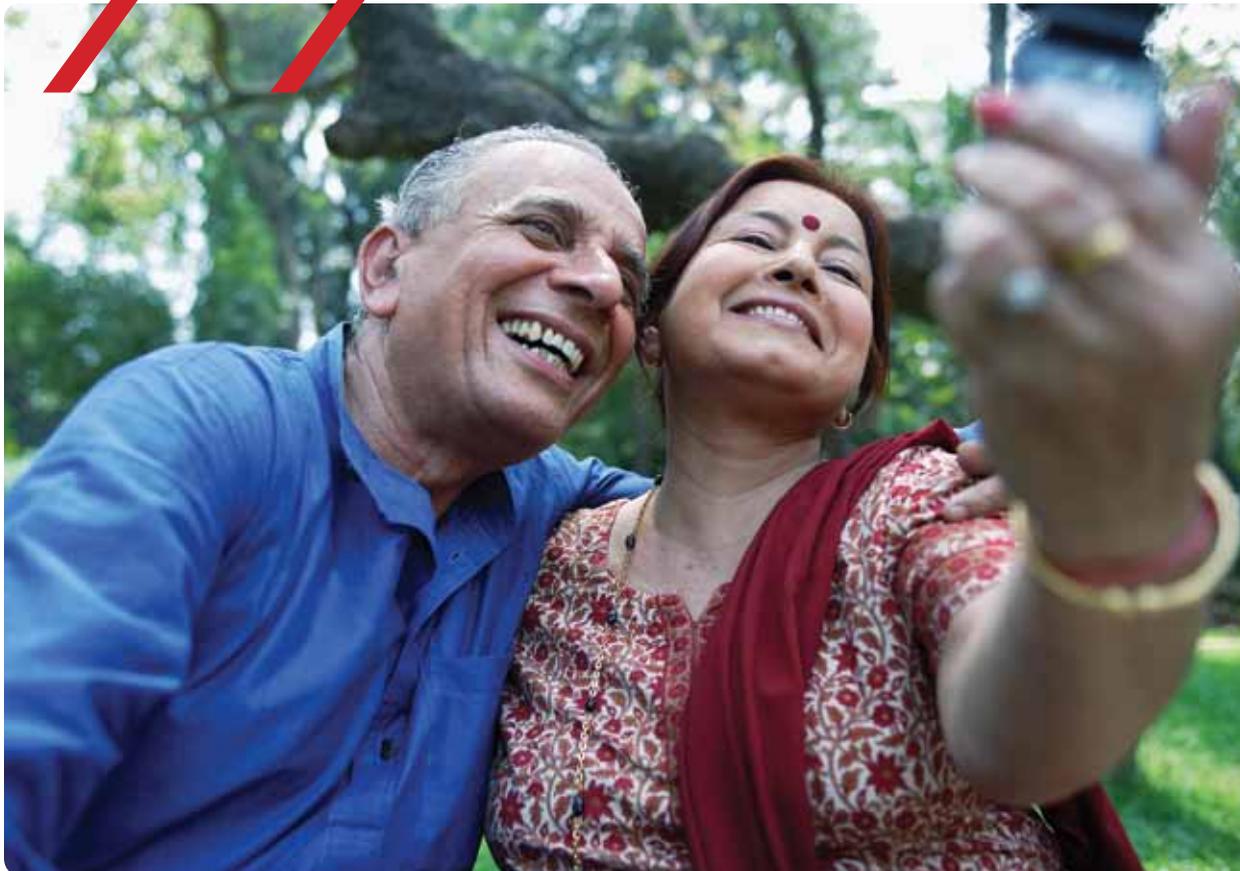
77



“It’s my best friend. I sleep with it. I eat with it. I bathe with it. I do everything with it.”

Singapore

Over **1.3 billion** mobile handsets were sold in 2010, up 18.5% compared with sales in 2009. And smartphone sales grew 74.4% between 2009 and 2010.



Mobile growth is being driven by demand in the developing world, and is being fueled by India and China in particular. These two countries collectively added 300 million new mobile subscriptions in 2010 – that’s more than the total number of mobile subscribers in the US.

Over **1 billion** of the world’s 5+ billion mobiles phones are now smartphones.

“Like a wife who knows everything about you, your bad and good habits, what you like and don’t like. She knows everything that you tell to your friends, what you think about your boss...a wife which always supports you.”

Russia

“He will save me if I need it, helps me plan my day, solves my problems...”

Russia

DOLLARS SPENT ON MOBILE SERVICES

IN 2010

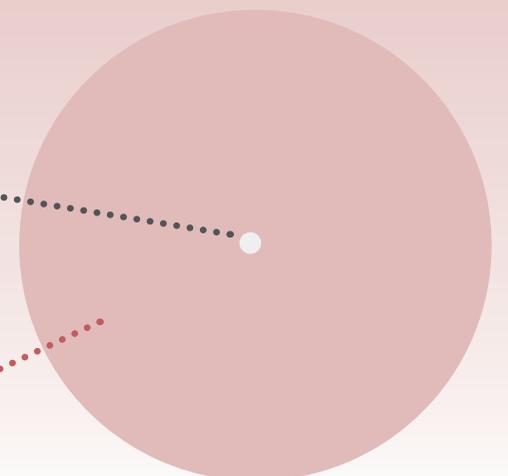
Americans spent

\$42.8 MILLION

IN 2015

Americans will spend

\$1.8 BILLION





the tablet: the wizard

People feel tablet screens can “do anything,” like a **Wizard**. This includes taking on the qualities of all the other screens as needed. The tablet is all powerful. It can go anywhere and do anything. Consumers can watch it like a TV. They can connect to the Internet with it and learn from it like a PC. And they can speak on it and communicate on it like a phone.

It amazes and surprises, and is a constant source of wonder. In a very short time, it has shown its **awesome power**, scope and range. Its growth and capabilities are exponential. It’s important to remember, though, that tablets are nascent in their development and consumers are still forming their relationships with them.

But the possibilities are **endless**.

Marketers: *Tablets can take on the attributes of any screen at any time. Be **flexible and nimble** when communicating through them. Be ready to adjust your message, tone and form quickly to jibe with what consumers are doing at any given time with the tablet. Whether providing information, provoking action or letting consumers interact with the world, marketing on a tablet should reflect the magic that only wizards are capable of.*



Percent of tablet users who are male:

60

“It’s...a tool I can use to create a lot of things and...it’s more flexible in that way...”

Colombia



Tablet sales will reach **81 million** units by 2015.

“It opens a whole wealth of knowledge...”

United States



“Young. Smart. Informative yet informal, at the same time. Cool...and slightly arrogant...”

United Kingdom

More than 50% of tablet users say tablets are ideal for researching products before making final purchases and ideal for browsing catalogs and retailers.

Percent of tablet users who have downloaded apps:

Tablets are shared: 43% of users say they share their tablets with others.

93

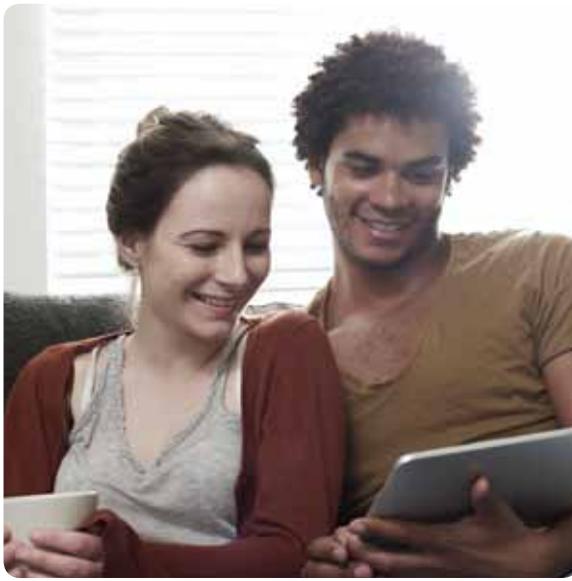


“A tablet is a reflection of whatever you want it to be.”

Saudi Arabia

Percent of tablet users whose household income is in excess of \$50,000:

43



Today’s tablet users represent 12% of the U.S. Internet population; that number is projected to grow to 23% by early 2012—a group that represents an estimated 54 million people.



87% of tablet users are accessing content and **information**, the dominant activity for this device.



“...an early adopter kind-of-a-character who just likes to show off a little bit.”

Singapore

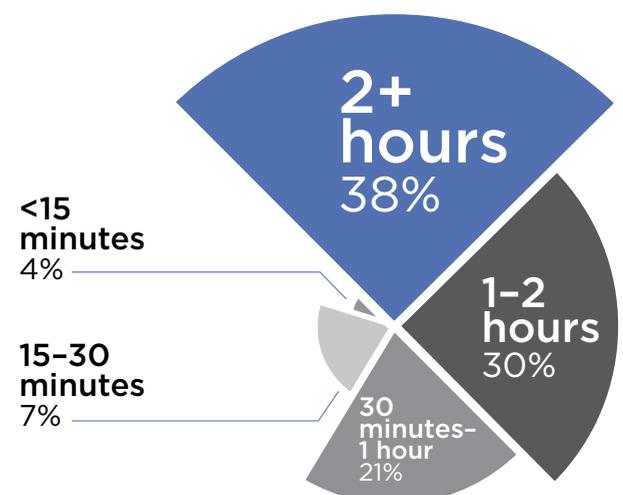
“I want to be a tablet. I don’t want to be a TV; I don’t want to be a computer; I don’t really want to be my phone... I’d want to be a tablet.”

United Kingdom

“I think the tablet is my fanciest friend because it’s... another level...one step ahead...”

Colombia

TABLET USAGE IN THE UNITED STATES



now what?

based on findings from this study, we recommend
that marketers consider the following:

TV is more relevant than ever. Consumers love to be entertained.

The **Everyman/Jester** is there to do it. Whether a TV screen is being viewed in America, Brazil or Saudi Arabia, audiences are receptive, waiting to be entertained and humored. TV is a rich, powerful way to reach consumers. Advertisers should continue to make great ads for it.



advertising on a PC should appeal to consumers' needs for knowledge, learning and challenge. It needs to be something they can share and show off, something befitting **The Sage**. It should tap into the users' **competitiveness** (e.g., maybe include a gaming component) and can be an especially appropriate way to reach younger consumers.

for mobile messages to be effective, they must recognize the personal nature of this "Lover" relationship. What works on television or other screens will not necessarily work on mobile devices. Messages must be **intimate, surprising and unobtrusive**. They must also be highly relevant, meaningful and useful, showing that you truly know the individual consumer.

Advertising for tablets needs to be similarly sensitive and must reflect which "hat" **The Wizard** is wearing.



reaching the next billion consumers

Truly **effective** creative advertising is not a one-size-fits-all proposition. In the future, the best campaigns will take full advantage of the different relationships that consumers have with screens and the archetypes they embody.

The number of media consumers is **growing rapidly**, especially in emerging markets. So is the number of screens. It's more important than ever for marketers to create and tailor their messaging to be most relevant – and for consumers to be most receptive – depending on what screen they're with at the time.

The real opportunity lies in knowing that consumers often interact with **more than one screen at a time**. They use and view different ones at once – surfing a laptop while watching TV while communicating on a mobile device or tablet.

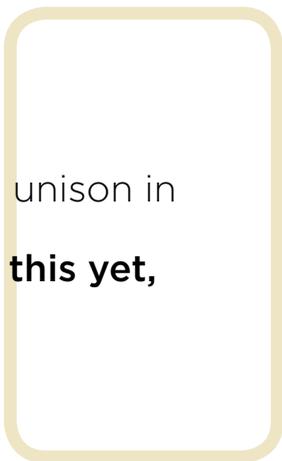




is this a problem?

no. Quite the opposite - it's a **giant opportunity**. All these screens don't limit a consumer's attention span. They multiply it. The commercial content you craft for and send through different screens can surround and engage the consumer as never before. The relationships that marketers have with consumers can actually be deepened and enhanced *because of* the number of screens in their lives.

Use this knowledge to hone how screen-specific messages can work in unison in a multiscreen environment for maximum effect. **No marketer has done this yet,** but one soon will. And others will follow.



Whether it's reaching an existing consumer base or "the next billion" customers in developing nations, one thing is certain: the insights revealed by this study can make you better equipped to engage with them effectively and meaningfully in this increasingly complex and fractured landscape.



remember, no matter how distant
consumers may seem—now or in the future—
they will never be far from a screen.



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Sources for screen statistics:

TV

California State University Northridge
Federal Communications Commission
Lab42.com
Pew Internet and American Life Project
The Nielsen Company
Zenith Optimedia

PC

eMarketer
eTForecasts
Gartner
HIS iSuppli
IDC
Kantar Media

Mobile

comScore
eMarketer
Gartner
GigaOm
IDC
mobiThinking
Morgan Stanley
New York Times
Onlineitdegree.com

Tablet

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Google/AdMob
IPSOS OTX Mediact
Juniper Research
Online Publishers Association
The e-tailing group
The Nielsen Company

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actual study interviews.

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