



# E-commerce in a Multiscreen World

Mobilio, April 2014



# Contents

---

A Multiscreen World



Romanian Context



Devices Used  
in E-commerce



Conclusions

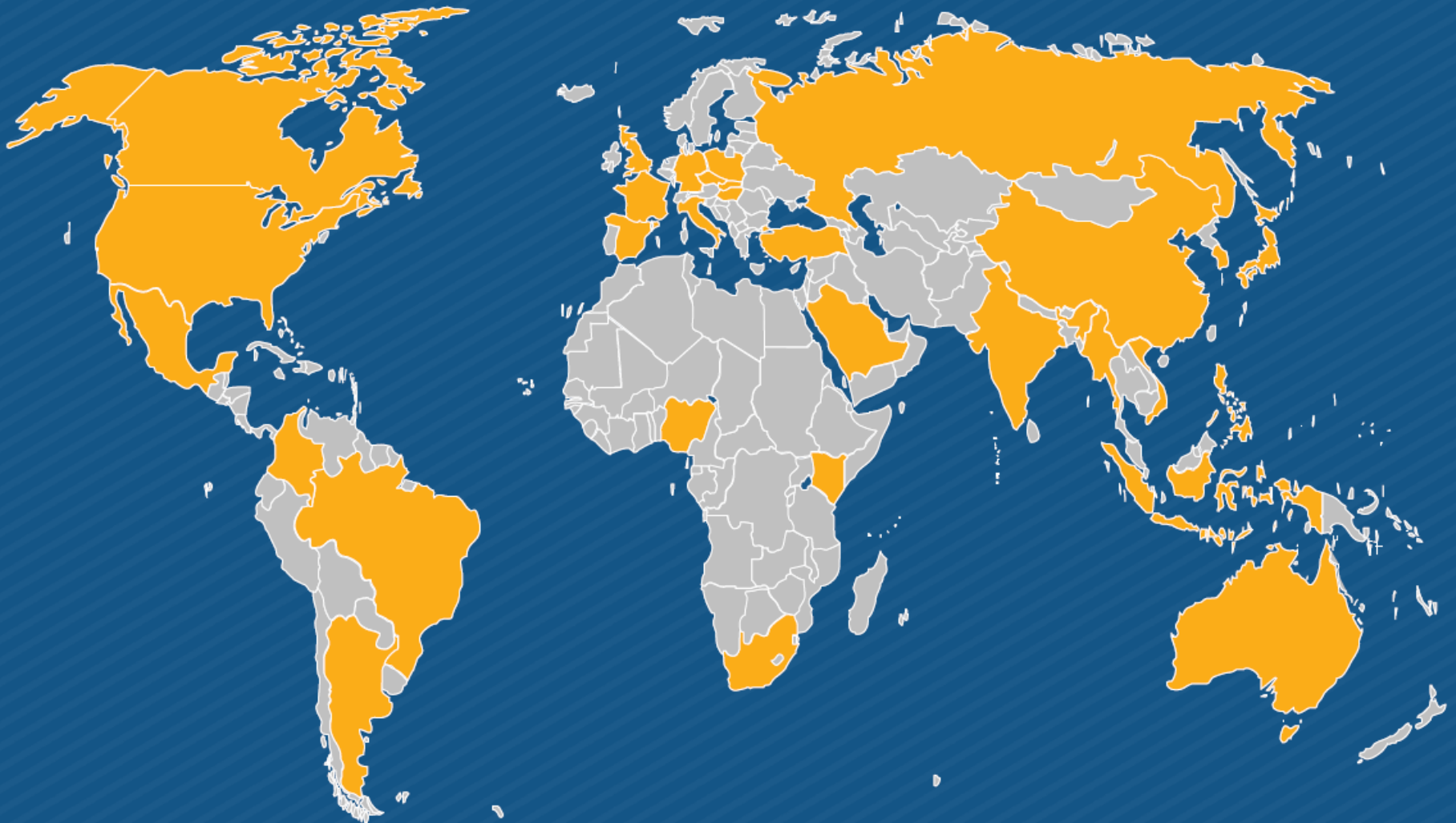
# A Multiscreen World



# AdReaction Global Survey\*

## CONDUCTED IN 30 COUNTRIES AROUND THE WORLD

[www.millwardbrown.com/adreaction](http://www.millwardbrown.com/adreaction)



# No of tablets/smartphones sold in 2013

## Global:

- ✓ 217 m tablets
- ✓ 1,000 m smartphones



## Local:

- ✓ 400k tablets
- ✓ 1,500k smartphones



# DAILY SCREEN USE (MINUTES)

A typical global multiscreen user consumes just under 7 hours of screen media daily.

Smartphones are now comfortably the largest single screen medium around the world.

Combined with tablet minutes, mobile devices now take up 47% of all screen time.

## Device Key



TV



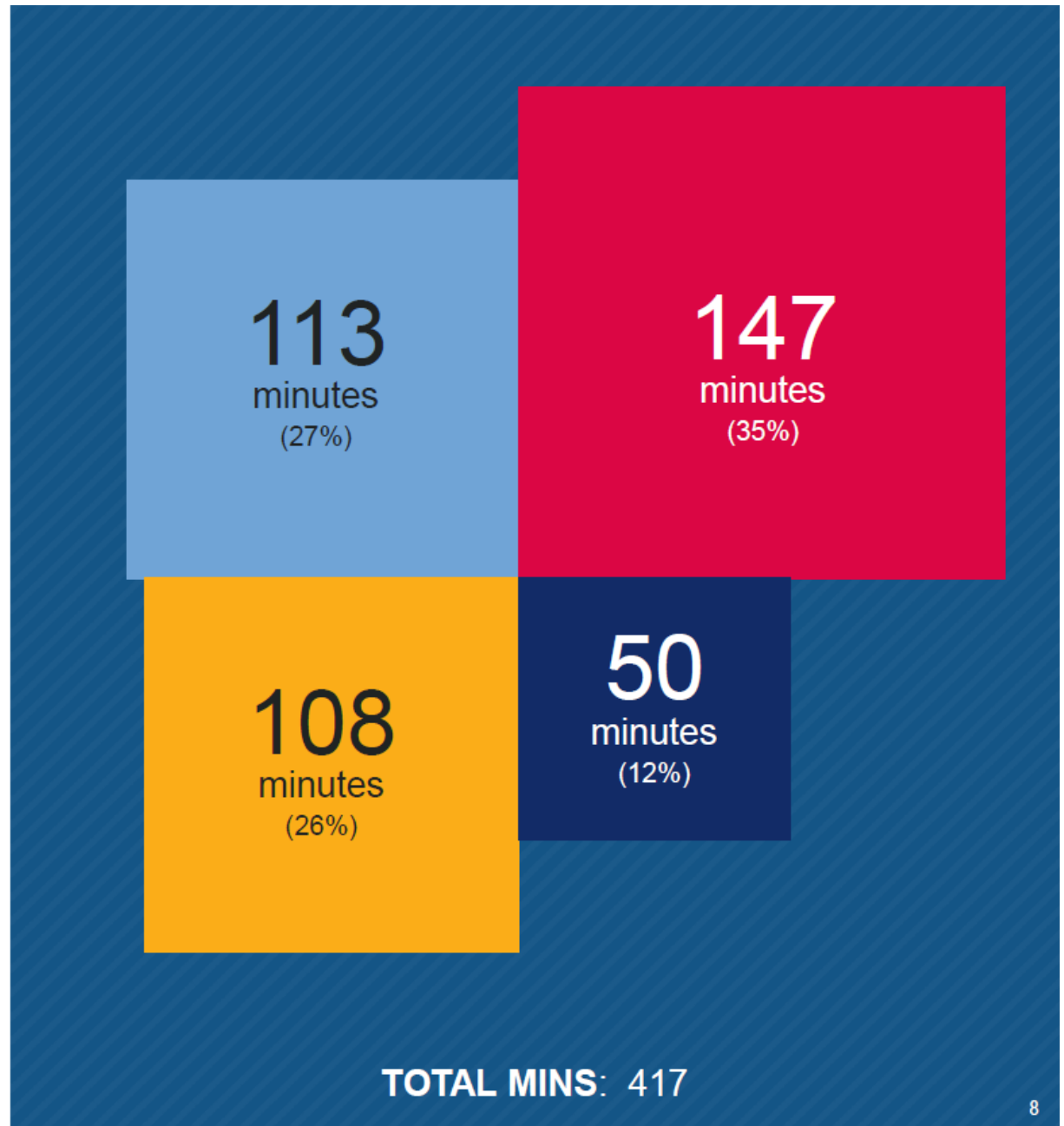
Laptop



Smartphone



Tablet



*Roughly how long did you spend yesterday...watching television (not online) / Using the Internet on a laptop or PC/ on a smartphone/ on a tablet?*

# HOW SCREEN MINUTES COMPARE ACROSS COUNTRIES

Overall screen minutes vary significantly by country, from 9 hours in Indonesia to just over 5 hours in Italy.

Smartphones are now the most viewed medium in all countries except UK, France and Spain (where TV leads) and Hungary, Poland, Russia, & Slovakia (where laptops lead).

## Device Key



TV



Laptop

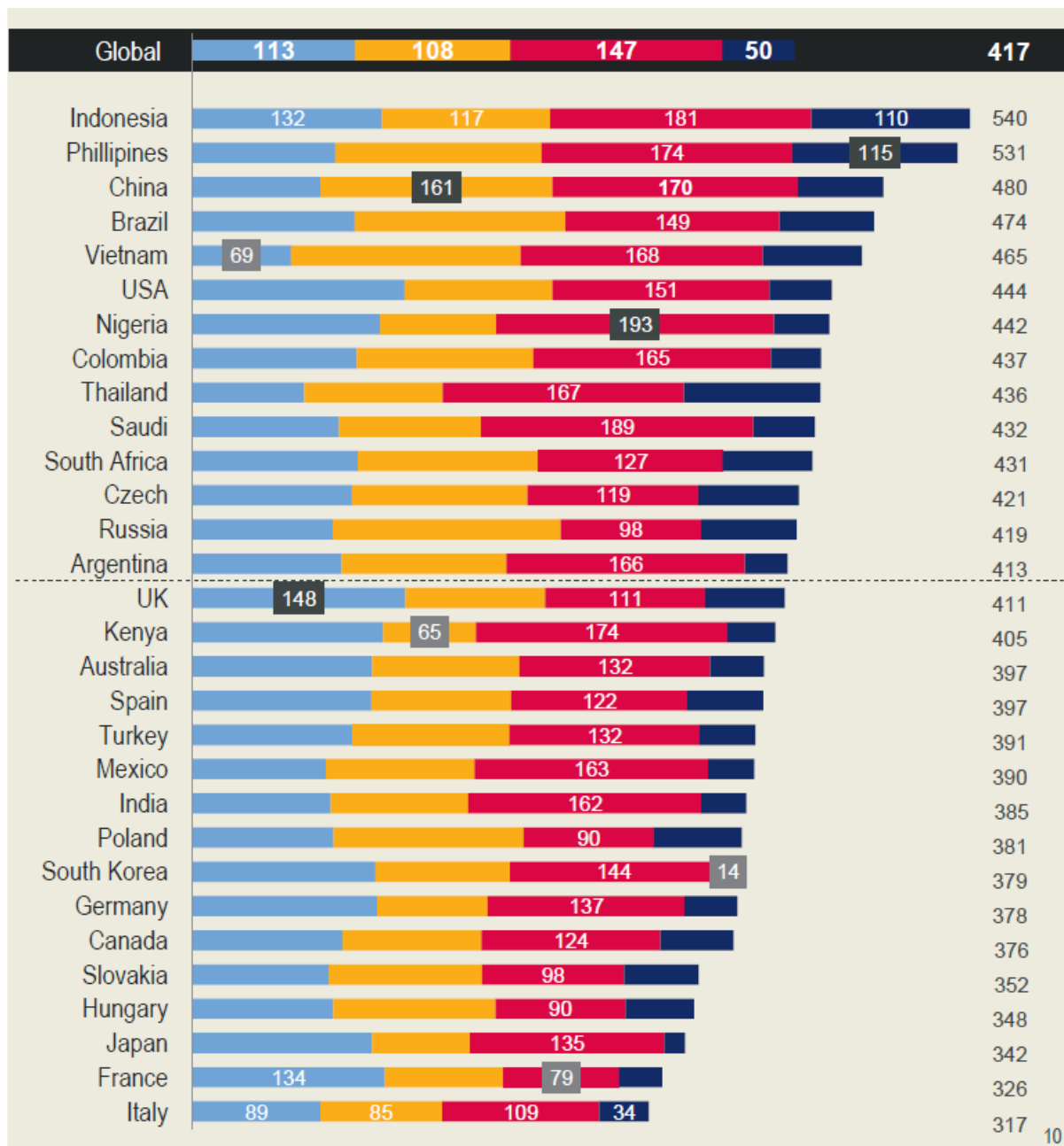


Smartphone



Tablet

*Roughly how long did you spend yesterday...watching television (not online)/ Using the Internet on a laptop or PC/ on a smartphone/ on a tablet?*



# SCREEN USE DURING THE DAY

Smartphones and laptops dominate daytime screen use, while TV takes center stage in the evenings.

Device Key



TV



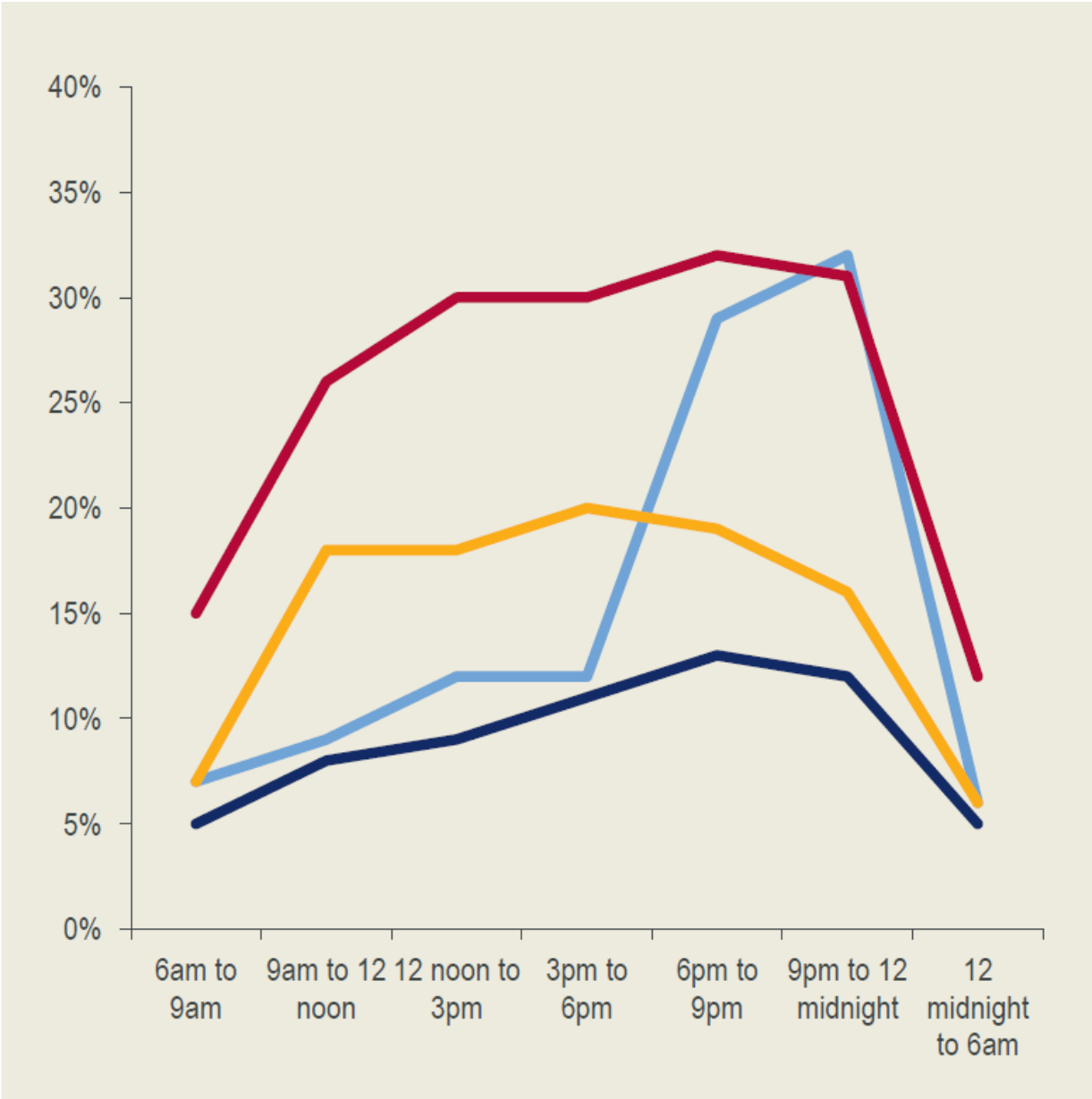
Laptop



Smartphone



Tablet





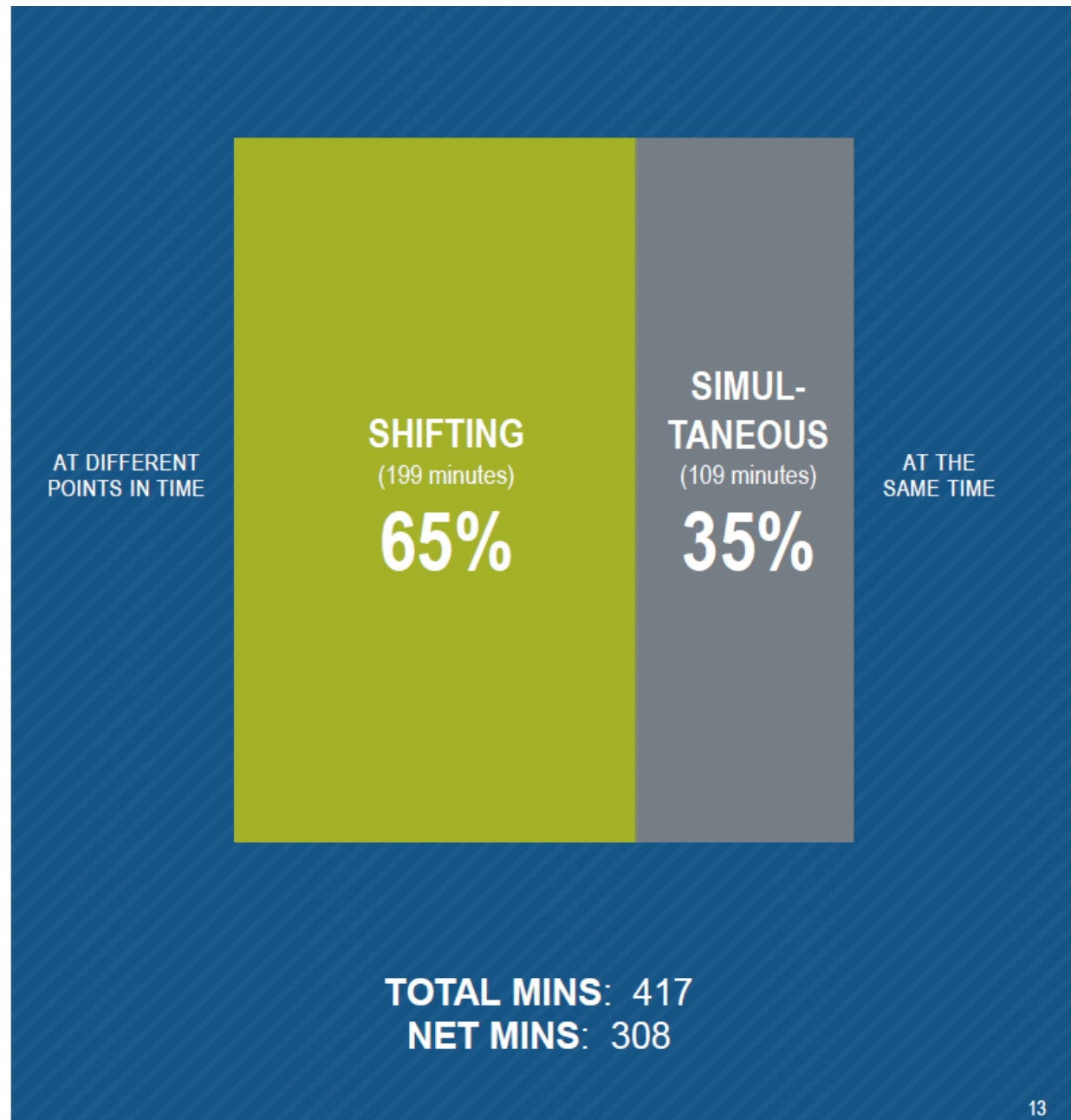
# MULTISCREEN MINUTES BY TYPE

Of the total time screens are being viewed, simultaneous use with TV is taking place around a third of the time.

Of their 7 hours screen consumption, 109 minutes is simultaneous consumption of a digital screen while watching TV.

Hence, a typical global multiscreen user spends just over 5 hours (308 minutes) with screens every day.

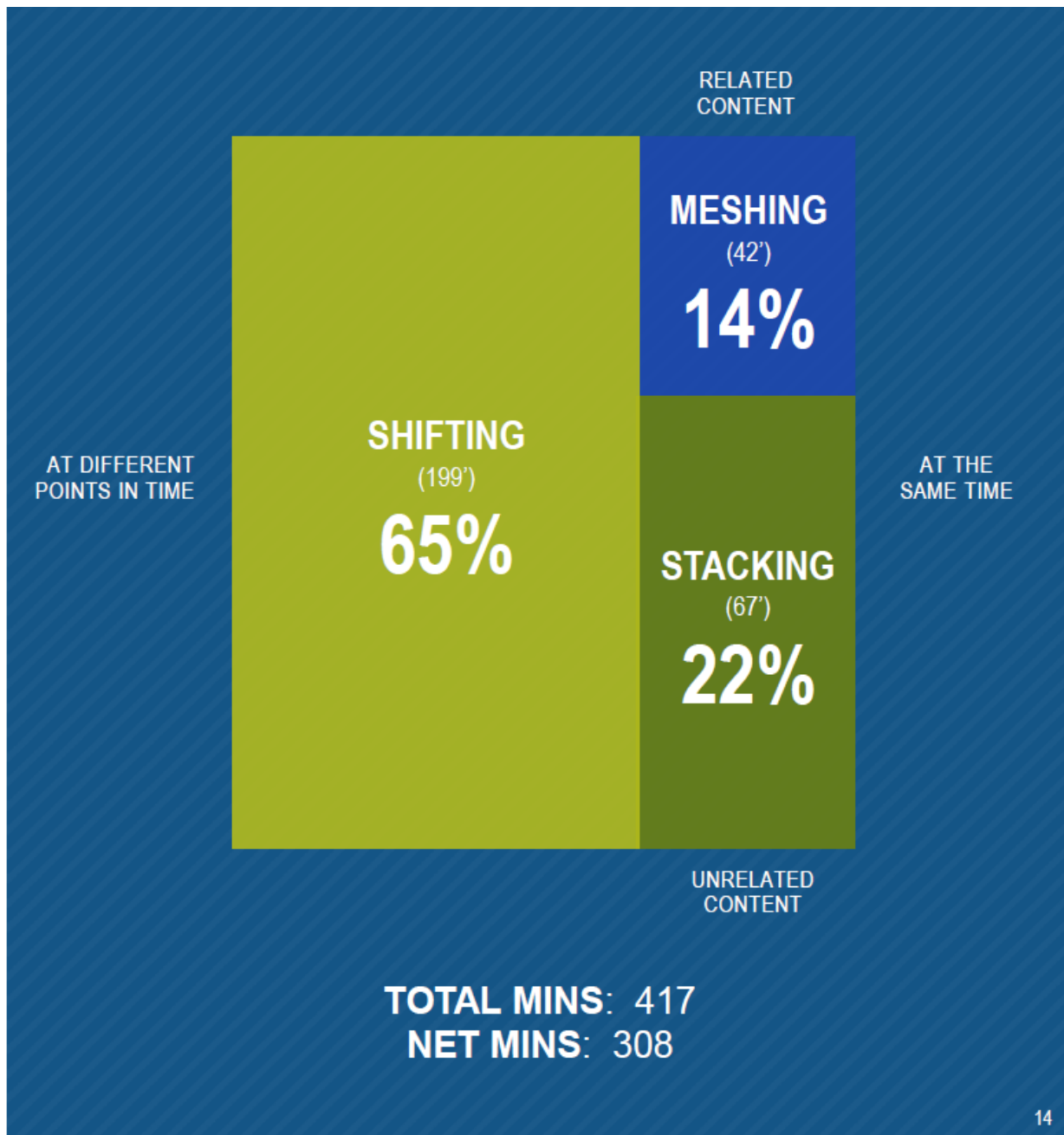
**Simultaneous:** At the same time as you were watching TV yesterday, how much time did you also spend using the Internet?



# MULTISCREEN MINUTES BY TYPE

We can then further break down the simultaneous minutes into “meshing” (where TV and a digital screen are being used to consume related content) and “stacking” (where the content is unrelated).

Generally, more time is spent stacking than meshing.



**Simultaneous:** At the same time as you were watching TV yesterday, how much time did you also spend using the Internet?

**Meshing:** While you were watching TV and using the Internet yesterday, how much of the time were you doing something related to what was happening on TV?

**Stacking:** Simultaneous minutes minus meshing minutes

# MULTISCREEN OPPORTUNITY PLOT – COUNTRIES

Combining receptivity with screen time shows the varying screen opportunities around the world.

Among multiscreen consumers, overall marketing potential is highest in Asia, Africa and Latin America.

Marketers in North America and Europe face a tougher challenge.

## Device Key



TV



Laptop



Smartphone

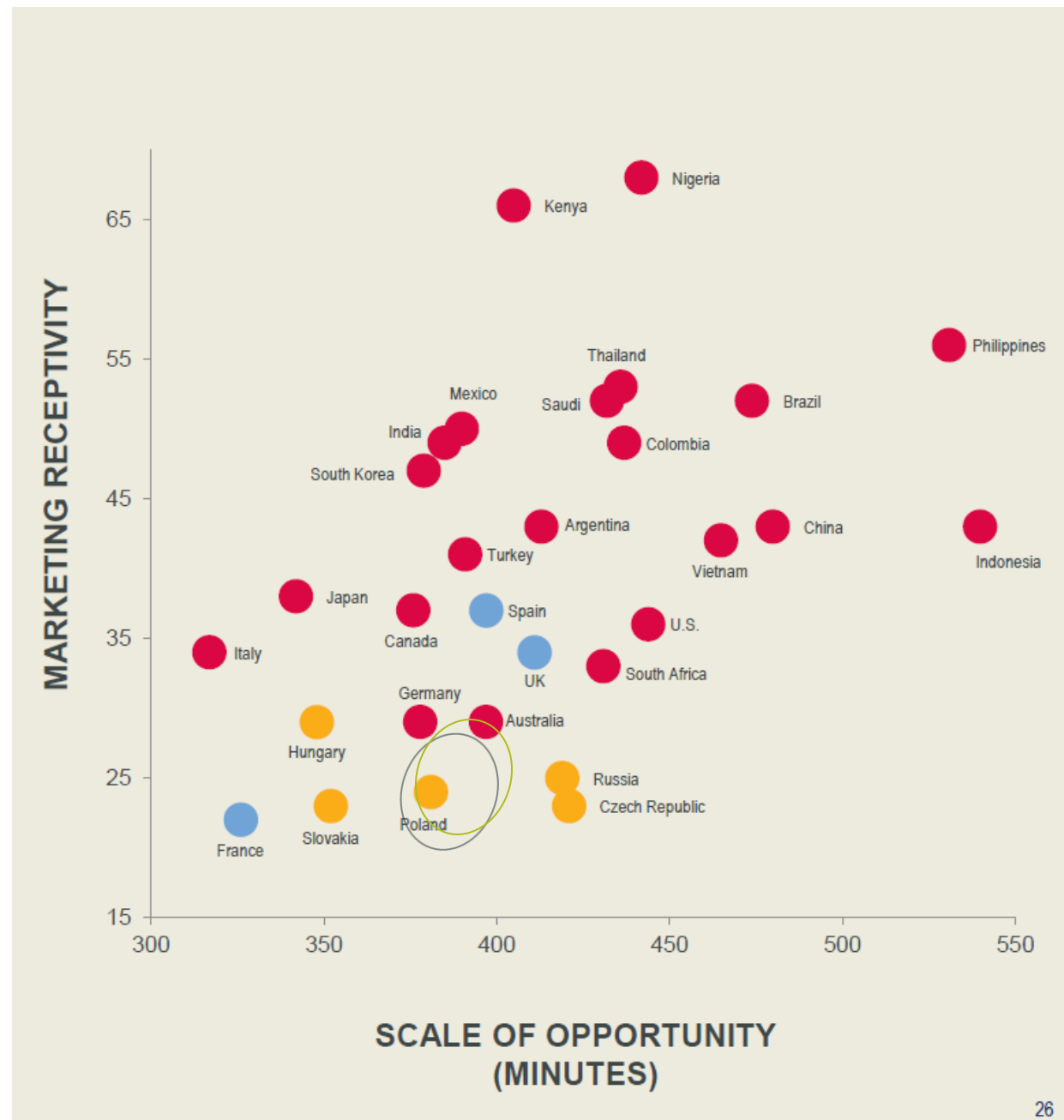


Tablet

Scale of opportunity = minutes per device.

Marketing receptivity = average of favorability (very/somewhat favorable) and attention (pay at least some attention)

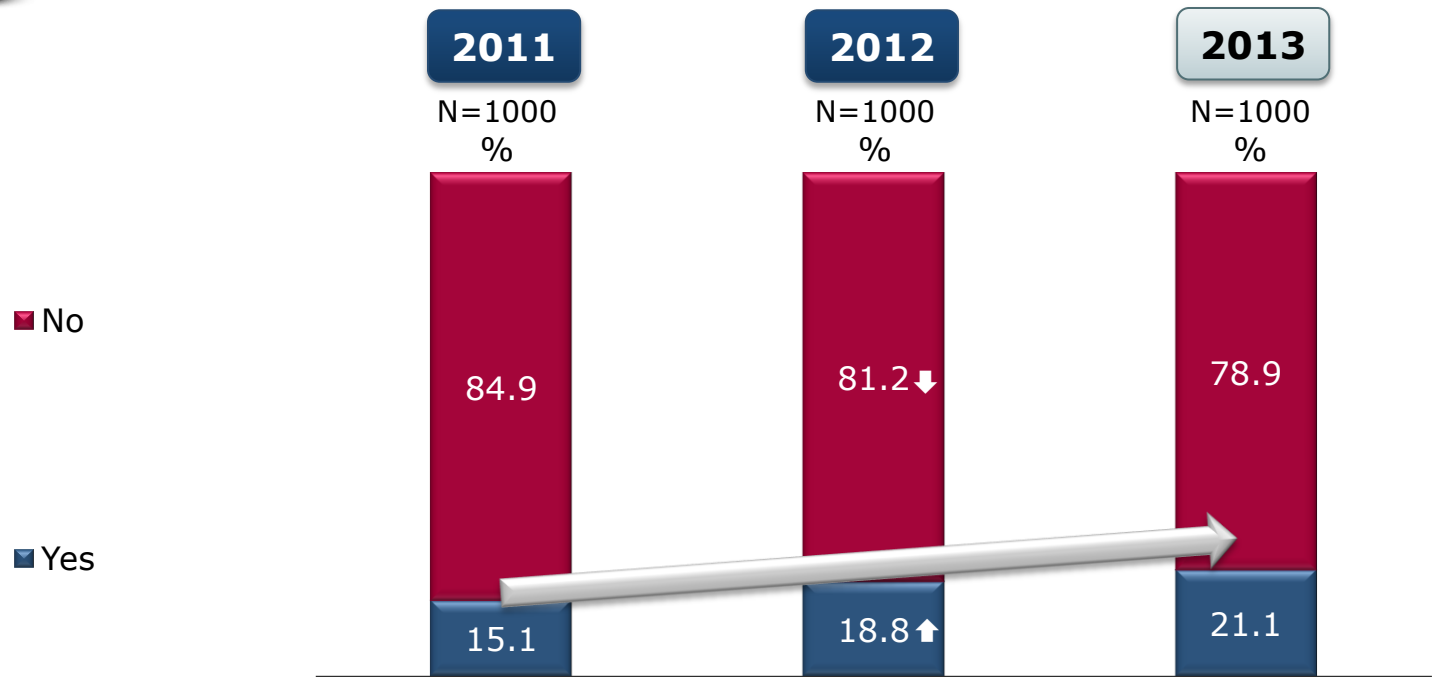
Color coding indicates the media with highest minutes in that country.



# Romanian Context



# E-commerce: Penetration (Urban)



**Source:** Living Standard (Daedalus Millward Brown annual study)

Q 8. Thinking about 2011/2012/2013, did you use the Internet for purchasing products or paying services?

# E-commerce: Purchase Frequency (Urban)



**Source:** Living Standards (Daedalus Millward Brown annual study)

\*Base: Respondents that used the Internet for purchasing products or paying services

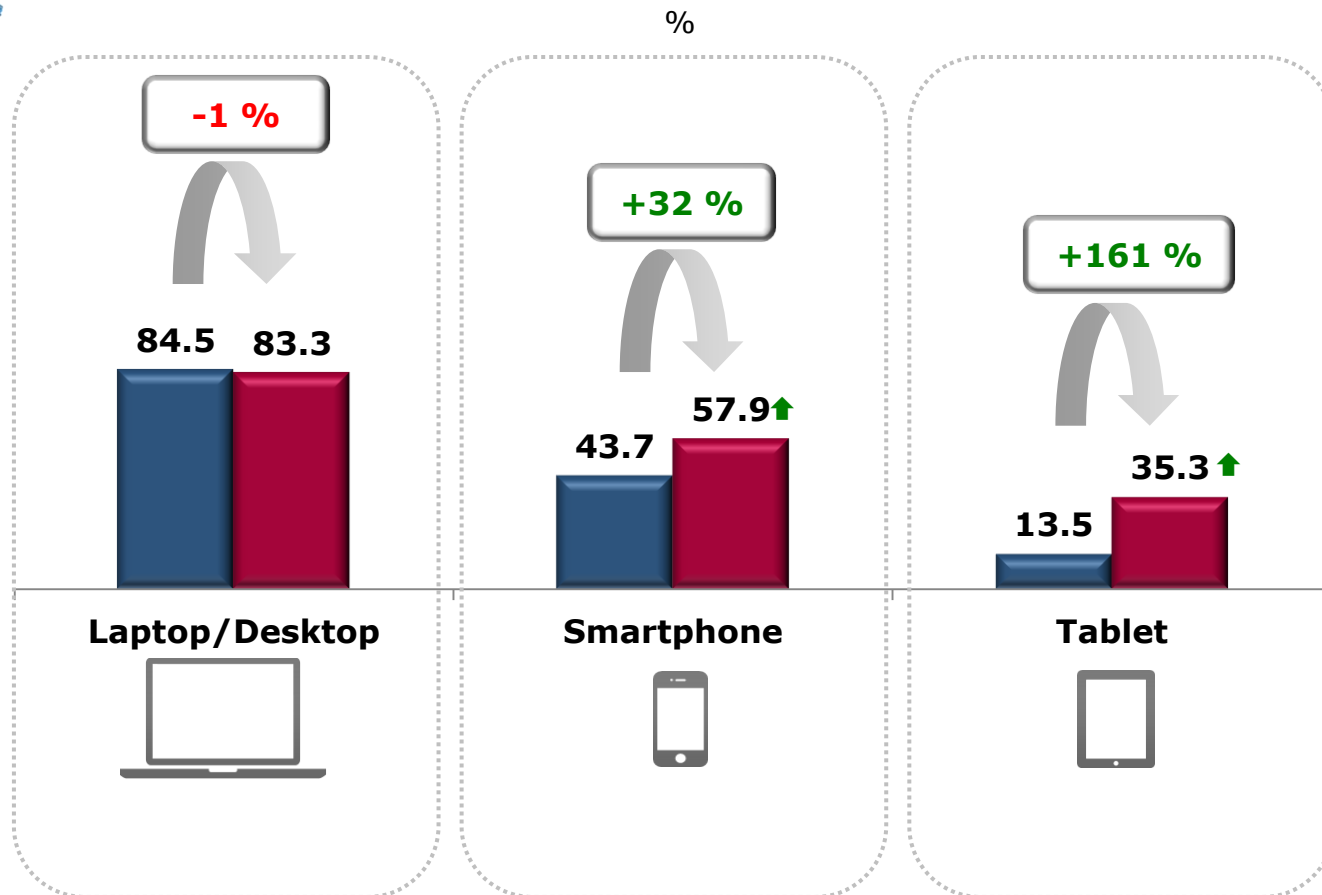
# Devices Used in E-commerce



# Ownership (2014 vs 2013)



## Romanian E-commerce users own...



\*xx - Difference between current year and past year  
\*\*Base: Respondents that purchased products /services online in the past 6 months

■ 2013 (N\*\*=444)

■ 2014 (N\*\*=484)

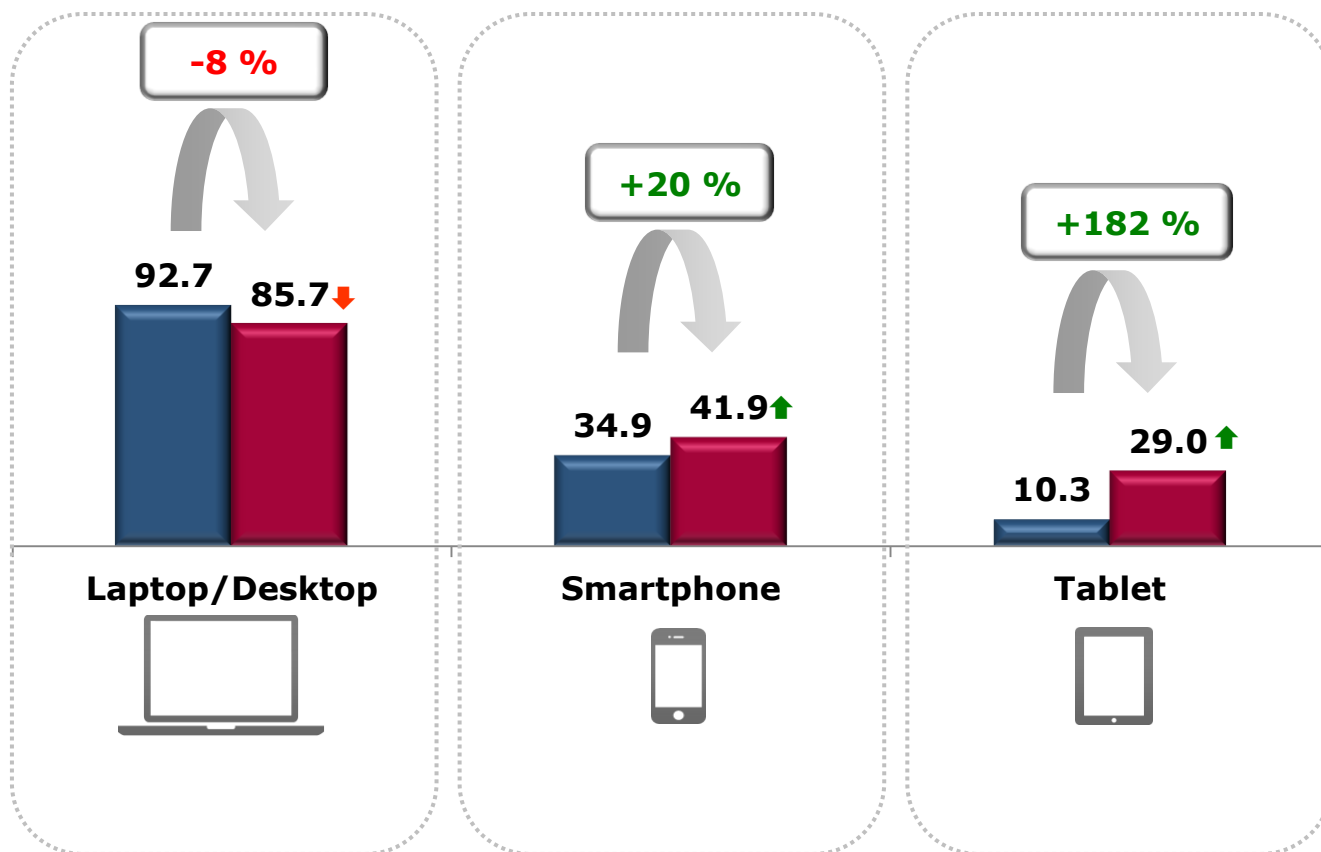
Q42.1 . Do you personally own a...



# Information (2014 vs 2013)

**They got informed about products or services through...**

%



\*xx - Difference between current year and past year

\*\*Base: Respondents that purchased products/services online in the past 6 months and own a tablet, laptop or a smartphone

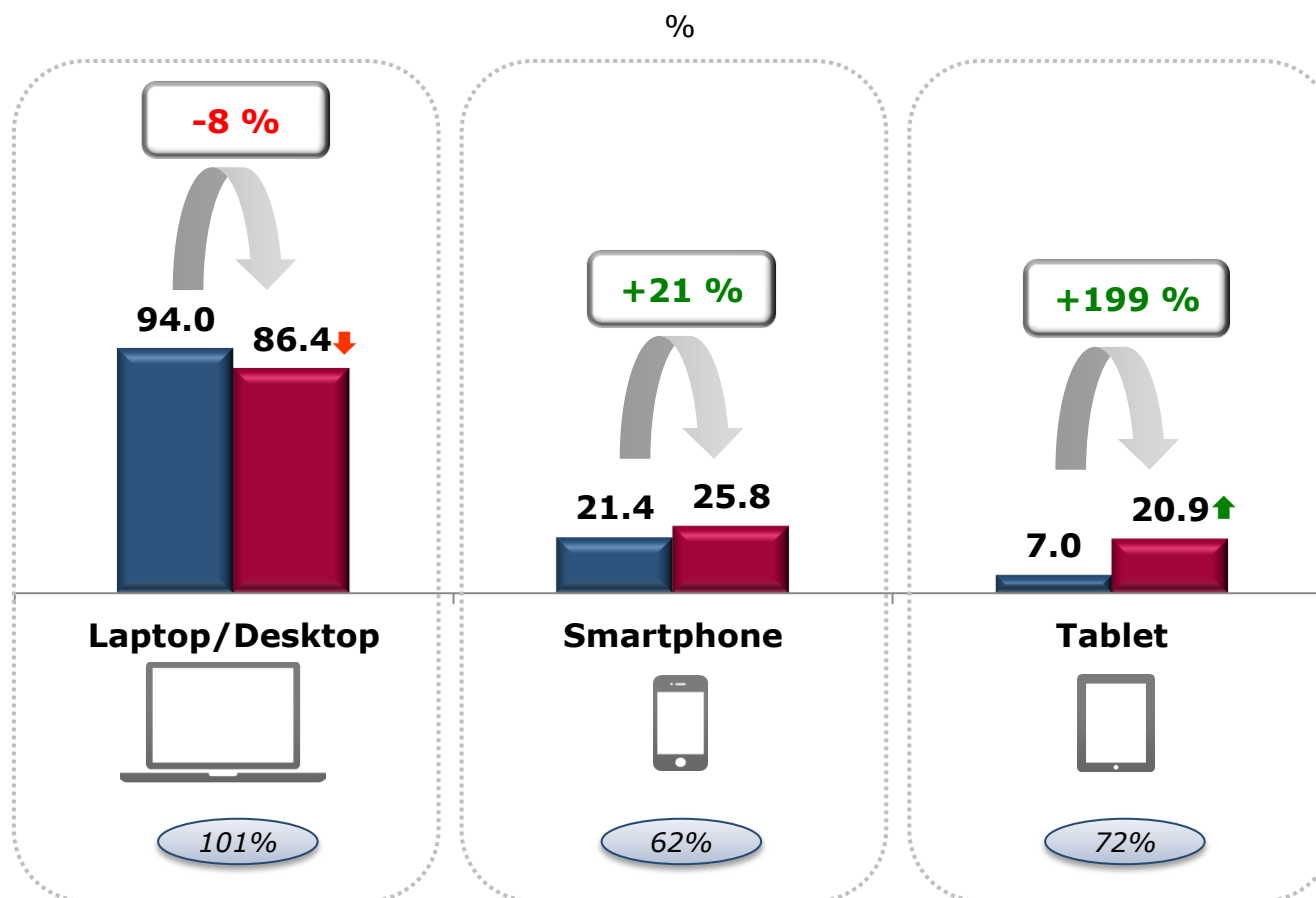
■ **2013** (N\*\*=398)

■ **2014** (N\*\*=449)

Q42.2 In the past 6 months, have you informed online about products or services, using...

# Comparison (2014 vs 2013)

## They compared prices using...



\*xx - Difference between current year and past year

\*\*Base: Respondents that purchased products/services online in the past 6 months and own a tablet, laptop or a smartphone

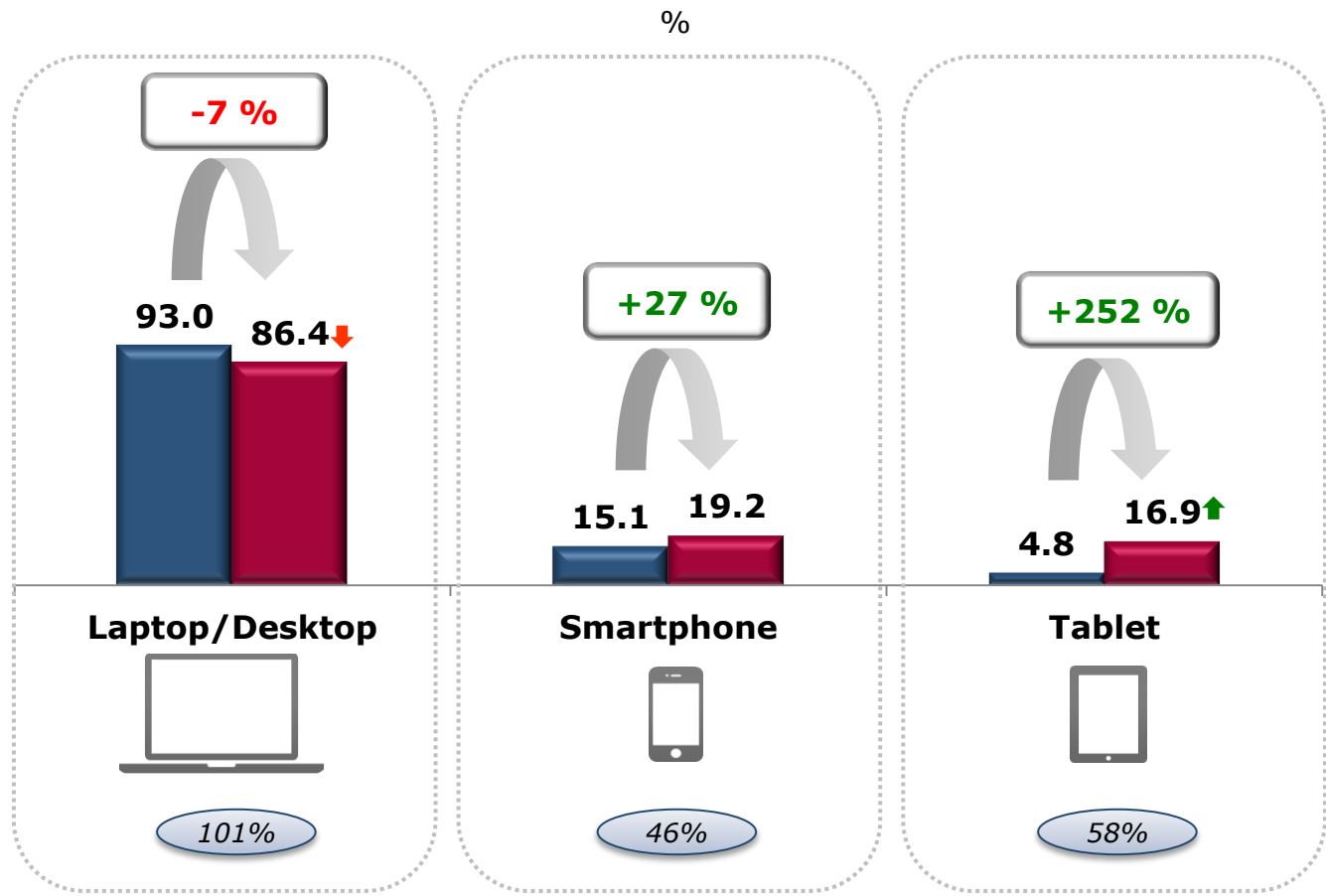
■ **2013** (N\*\*=398)

■ **2014** (N\*\*=449)

Q42.3 In the past 6 months, have you compared online prices for products or services using...

# Purchasing (2014 vs 2013)

## They purchased online using...



\*xx - Difference between current year and past year  
\*\*Base: Respondents that purchased products/services online in the past 6 months and own a tablet, laptop or a smartphone

■ **2013** (N\*\*=398)      ■ **2014** (N\*\*=449)

Q42.4 Have you purchased online in the past 6 months products or services using...

# Conclusions



# Conclusions

---

- ✓ Multiscreen is a reality. Presence on a single screen limits substantially the share of opportunity
- ✓ In many countries mobile devices have already overcome in usage the fixed devices in terms of time spent in a normal day
- ✓ Usage of tablets and smartphones in the decision making process boomed last year
- ✓ There is a huge opportunity in adapting the e-commerce sites to smartphones

Multimesc

