



Personal Prime Time

February 2018

Background

Prime Time - the moment of greatest consumer engagement with media – was once seen as monolithic; a single daypart on a single screen shared by all. As platforms have multiplied and consumers have taken control, this monolith has shattered, and individual consumers are creating different, individualized Prime Times across dayparts, content verticals, and screens. Along with these new **Personal Prime Times** come new moments of greatest engagement in which publishers can leverage their unique strengths and relationships with their audience on behalf of marketers seeking to build more relevant, and more impactful, connections with consumers.

Objectives and Methodology

Objectives:

This study, as the first step to understand Personal Prime Time, will focus on the consumer journey and map the contexts (when), drivers (why), and modes (how) through which consumers are creating their own Prime Times, the moment of high value and high engagement, across content and devices throughout their day. In addition, this research will consider how different consumer attributes (e.g., age, parental status) impact these contexts, drivers, and modes, to allow for better targeting across dayparts and platforms.

Methodology:

- An online survey was fielded among MARU/Matchbox's Springboard America online panel (~250,000 US members).
- The total sample included 1,901 consumers ages 18+ in the US, representative by Census.
- The survey was fielded 1/17/2018 – 1/23/2018.

Key Takeaways

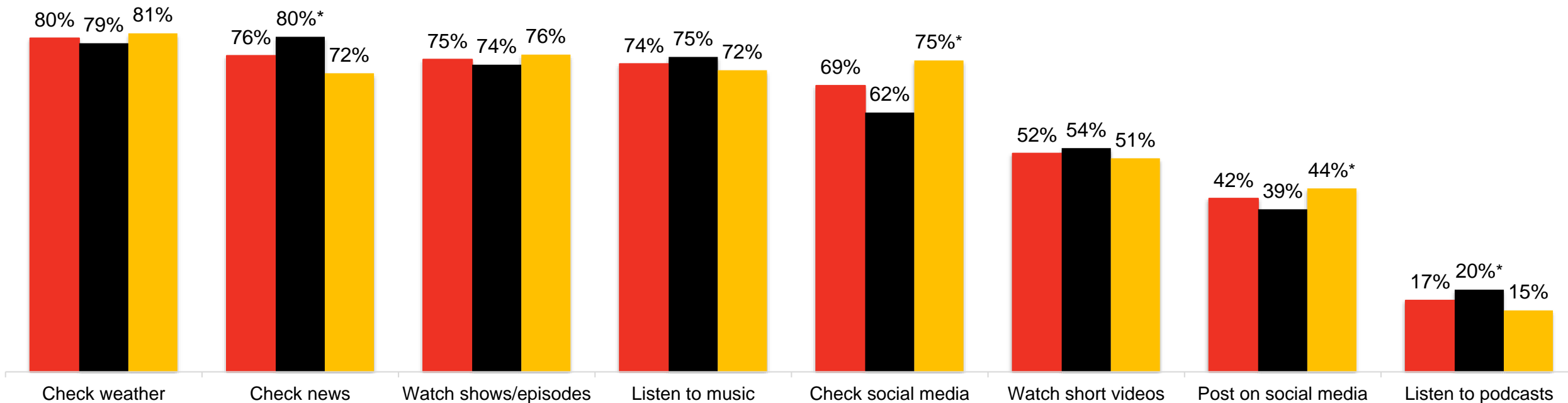
- **Majorities** of consumers who regularly engage media are doing so **multiple times** per day – this multi-engagement behavior is occurring **across content verticals** from social media (both posting and checking), to music, to watching shows/episodes, to short videos, to news, weather, and podcasts.
- The **need states** driving these multiple engagements throughout the day vary, both by content vertical, as well as within content verticals as the day progresses.
- Consumers are **investing concentration** in each of these engagements, and **deriving value from** them, creating a series of multiple, **Personal Prime Times** throughout the day. There is no longer a single, universal moment of greatest engagement. Now, **every daypart** is rich with opportunities for meaningful consumer engagement.
- These engagements move **across screens**, both within and across dayparts, to match consumers' specific needs and contexts. Mobile devices in particular are regular (and in some cases dominant) screens to which consumers turn to engage the content they need.
- Each of these **Personal Prime Times** creates opportunities for marketers to **add relevant value** to consumers' engagements by creating **need state-** and **device-specific experiences** throughout the consumer's day.

MEDIA LANDSCAPE: A broad range of media are used regularly

Activities Conducted on a Regular Basis

Among Total US 18+, Male, Female

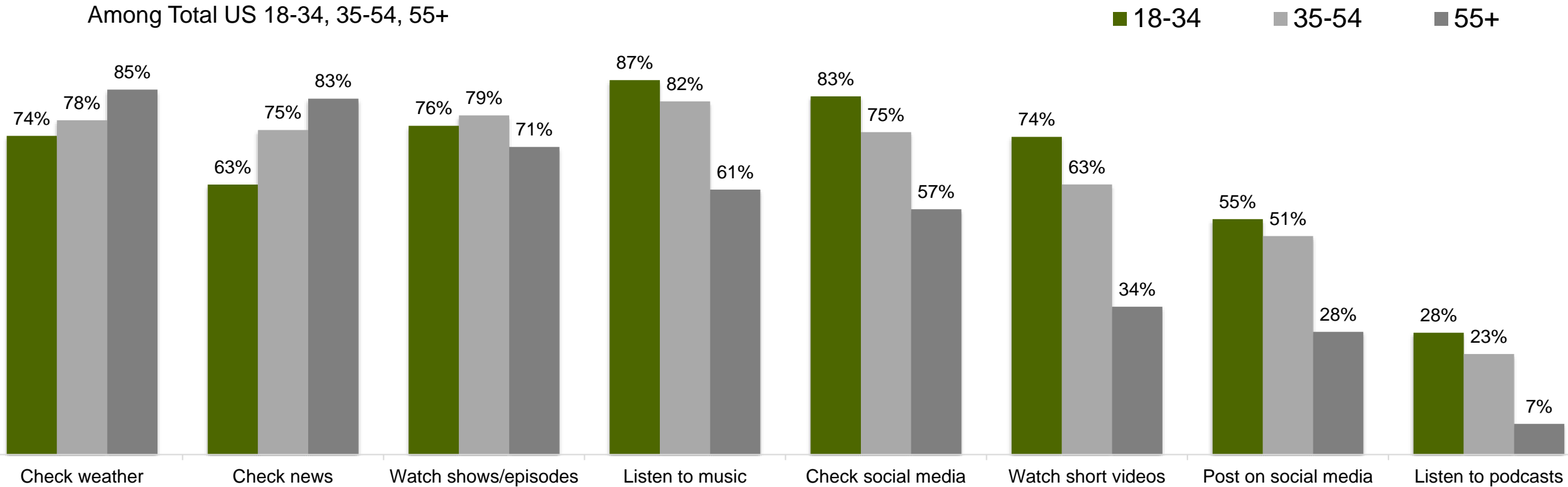
■ Total ■ Male ■ Female



MEDIA LANDSCAPE: Engagement varies by generation

Activities Conducted on a Regular Basis

Among Total US 18-34, 35-54, 55+



THE STRUCTURE OF **PERSONAL PRIME TIME**

- **MULTIPLE DAILY ENGAGEMENTS**
- **MIX OF NEED STATES THROUGHOUT DAY**
- **CONSUMER ATTENTION INVESTED (**CONCENTRATION**)
THROUGHOUT DAY**
- **CONSUMER **VALUE** DERIVED ACROSS DAYPARTS**
- **DIVERSE DEVICE/SCREEN CHOICE**

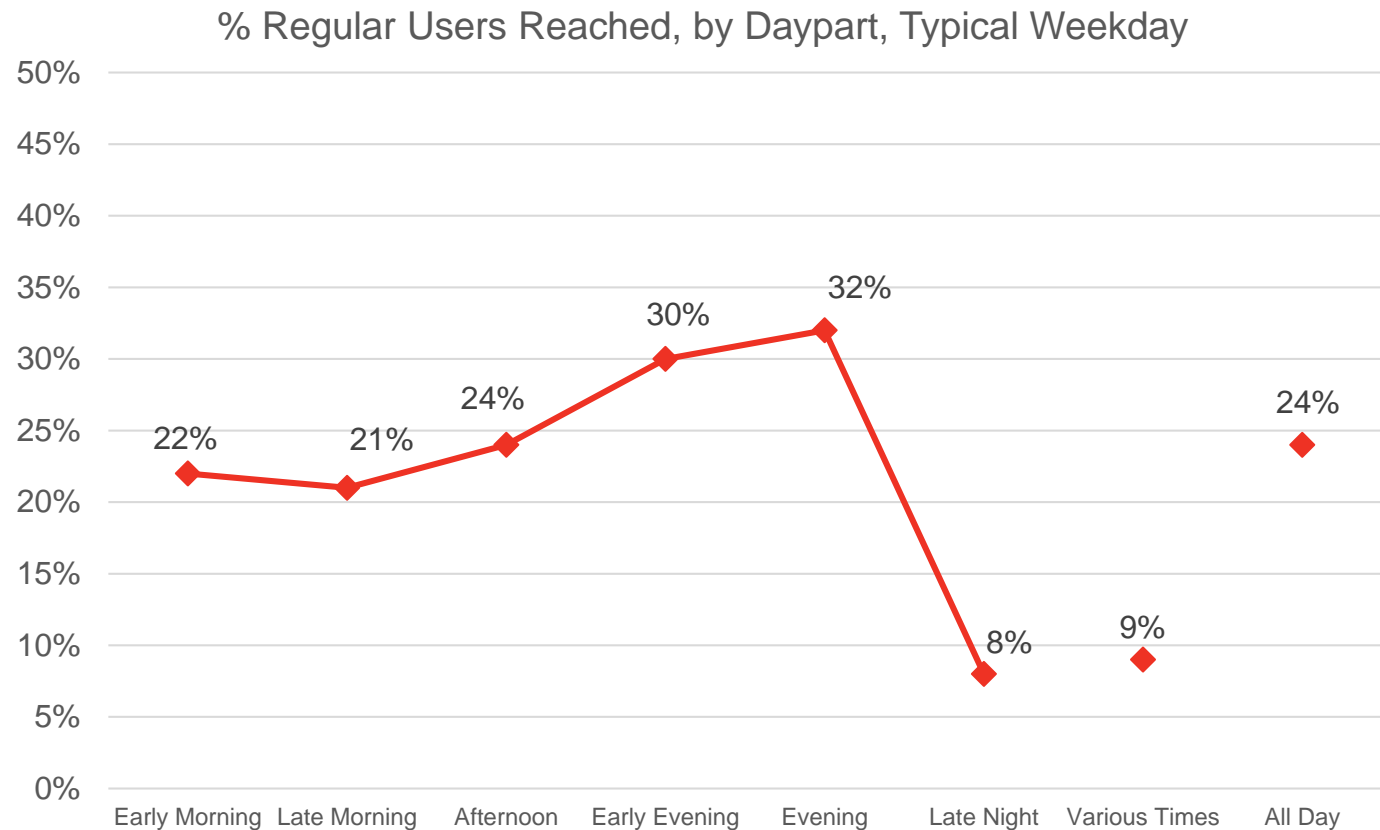
PERSONAL PRIME TIME: CHECK SOCIAL MEDIA

CHECK SOCIAL MEDIA: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

69%

of consumers say they **regularly** check social media

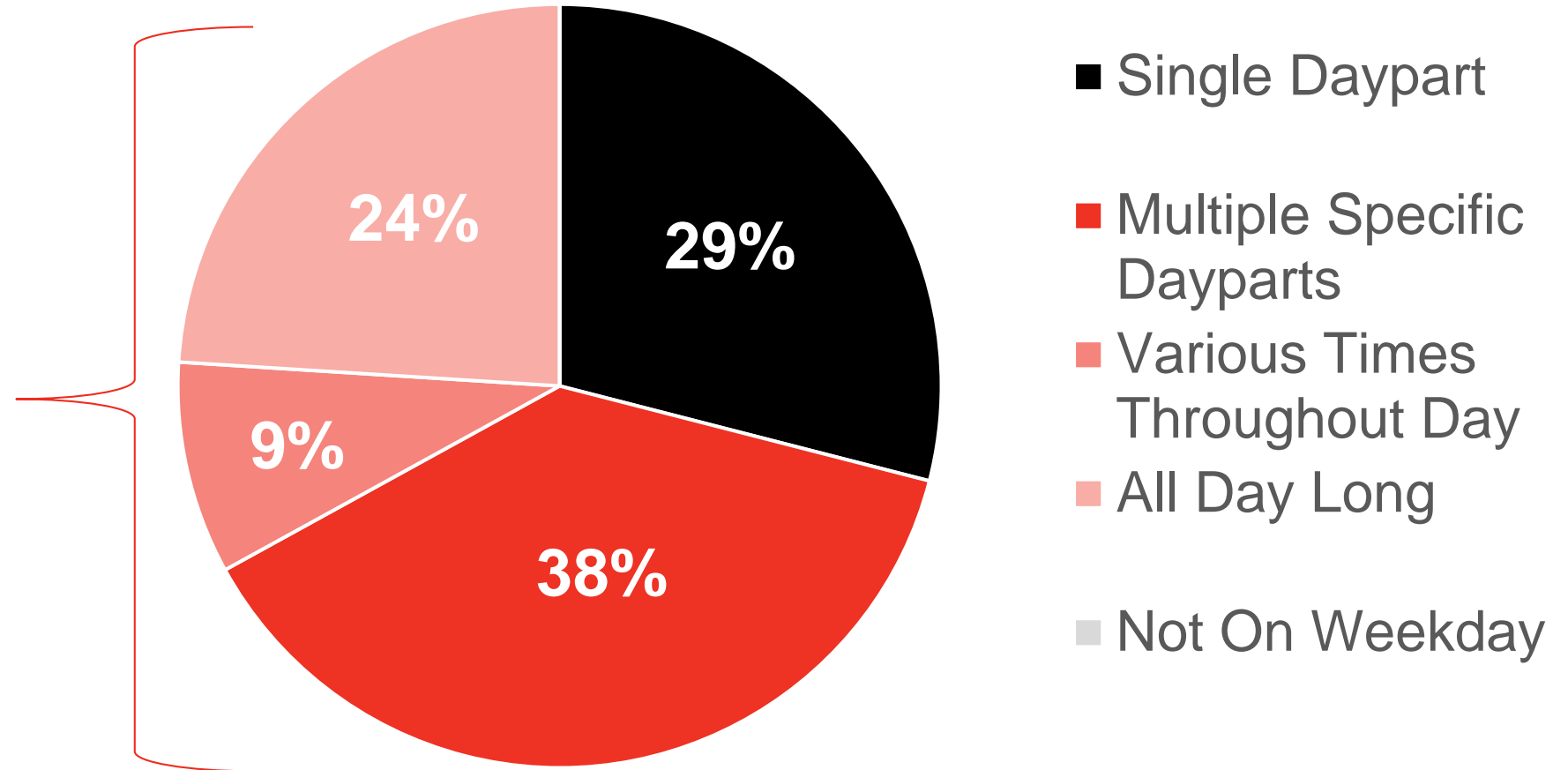


CHECK SOCIAL MEDIA: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

71%

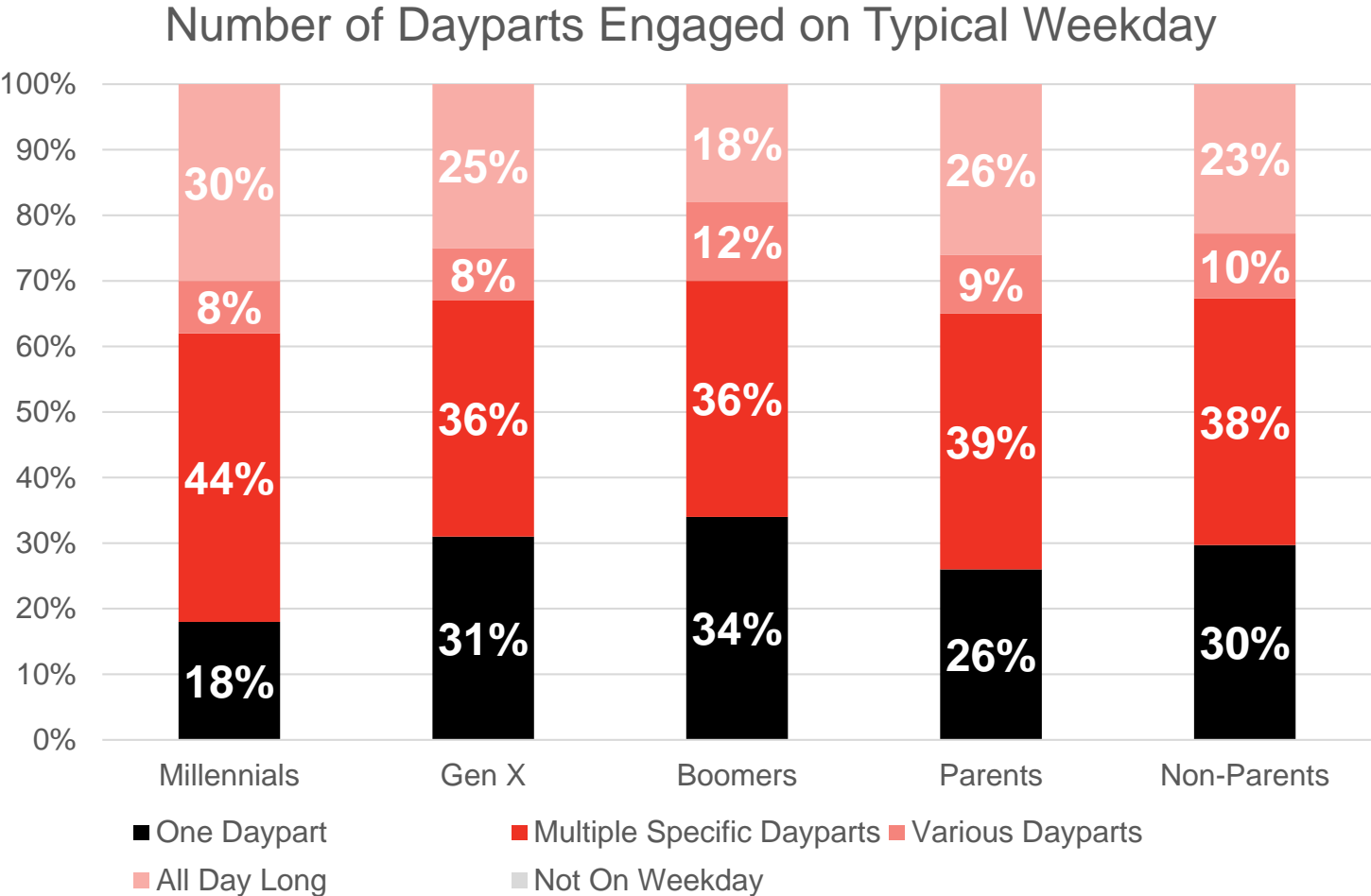
of consumers who say they regularly check social media say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

CHECK SOCIAL MEDIA: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



CHECK SOCIAL MEDIA: Need States drive the ‘why’ for each of these engagements

Connect with Others and **Be Entertained** are each top need states throughout the day. **Get Information**, **Take A Break**, and **Pass The Time** move in and out of the need state mix as the day unfolds.

Need States vary by generation as well. For example, for Millennials, **Pass The Time** and **Be Entertained** alternate as their top need state throughout the day, for Boomers, **Connect with Others** is consistently the top need state throughout the day.

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Connect with Others 50%	Be Entertained 34%	Get Information 33%	Pass The Time 32%
Late Morning	Connect with Others 51%	Be Entertained 40%	Pass The Time 35%	Get Information 31%
Afternoon	Connect with Others 45%	Pass The Time 40%	Be Entertained 38%	Get Information 29%
Early Evening	Connect with Others 50%	Be Entertained 45%	Pass The Time 39%	Get Information 28%
Evening	Connect with Others 49%	Be Entertained 44%	Pass The Time 41%	Get Information 25%
Late Night	Be Entertained 50%	Pass The Time 42%	Connect with Others 41%	Get Information 25%
Various Times	Connect with Others 61%	Pass The Time 43%	Be Entertained 43%	Take A Break 27%
All Day Long	Be Entertained 64%	Connect with Others 61%	Pass The Time 59%	Take A Break 39%

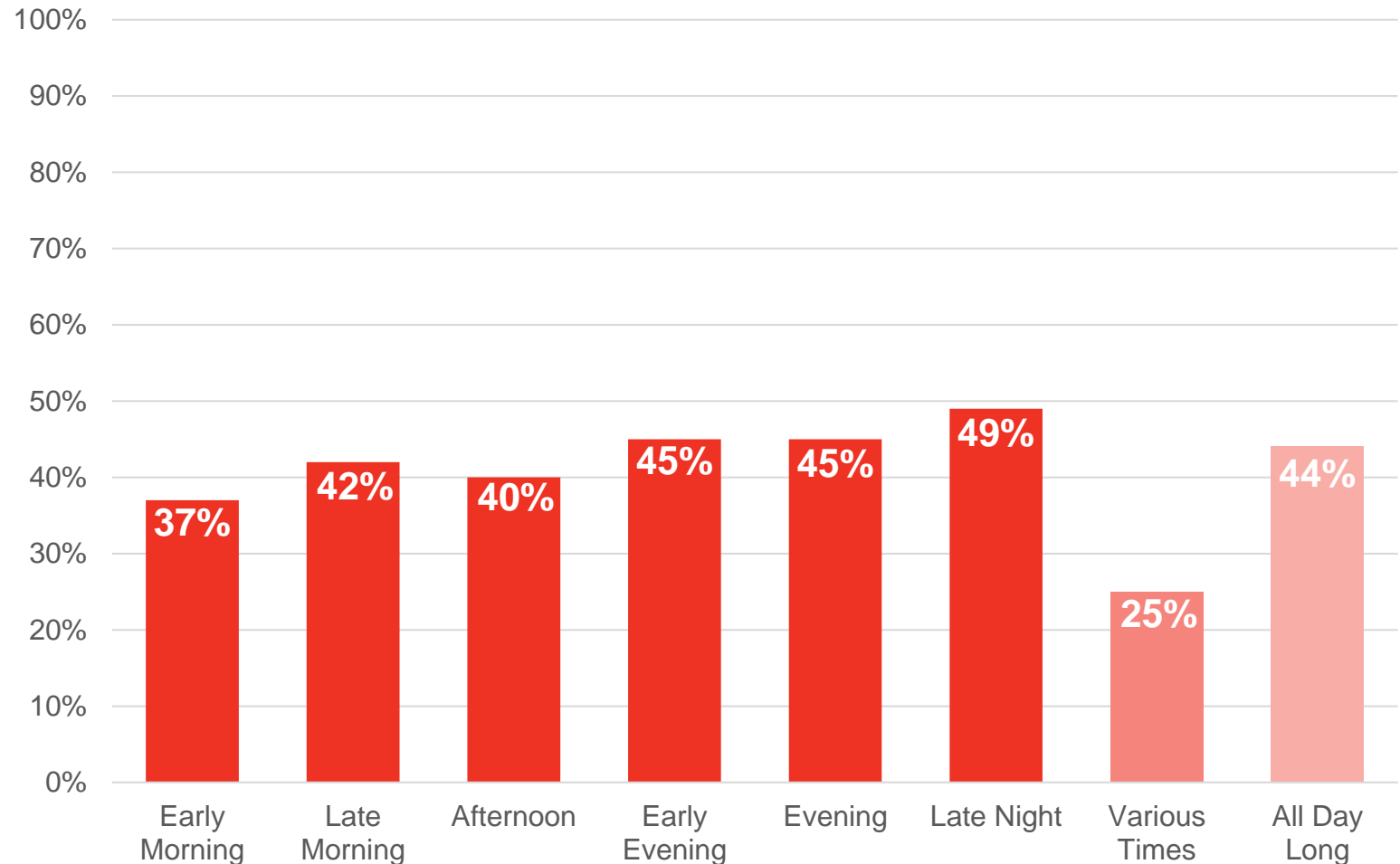
CHECK SOCIAL MEDIA: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they **check social media** remains **largely consistent** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



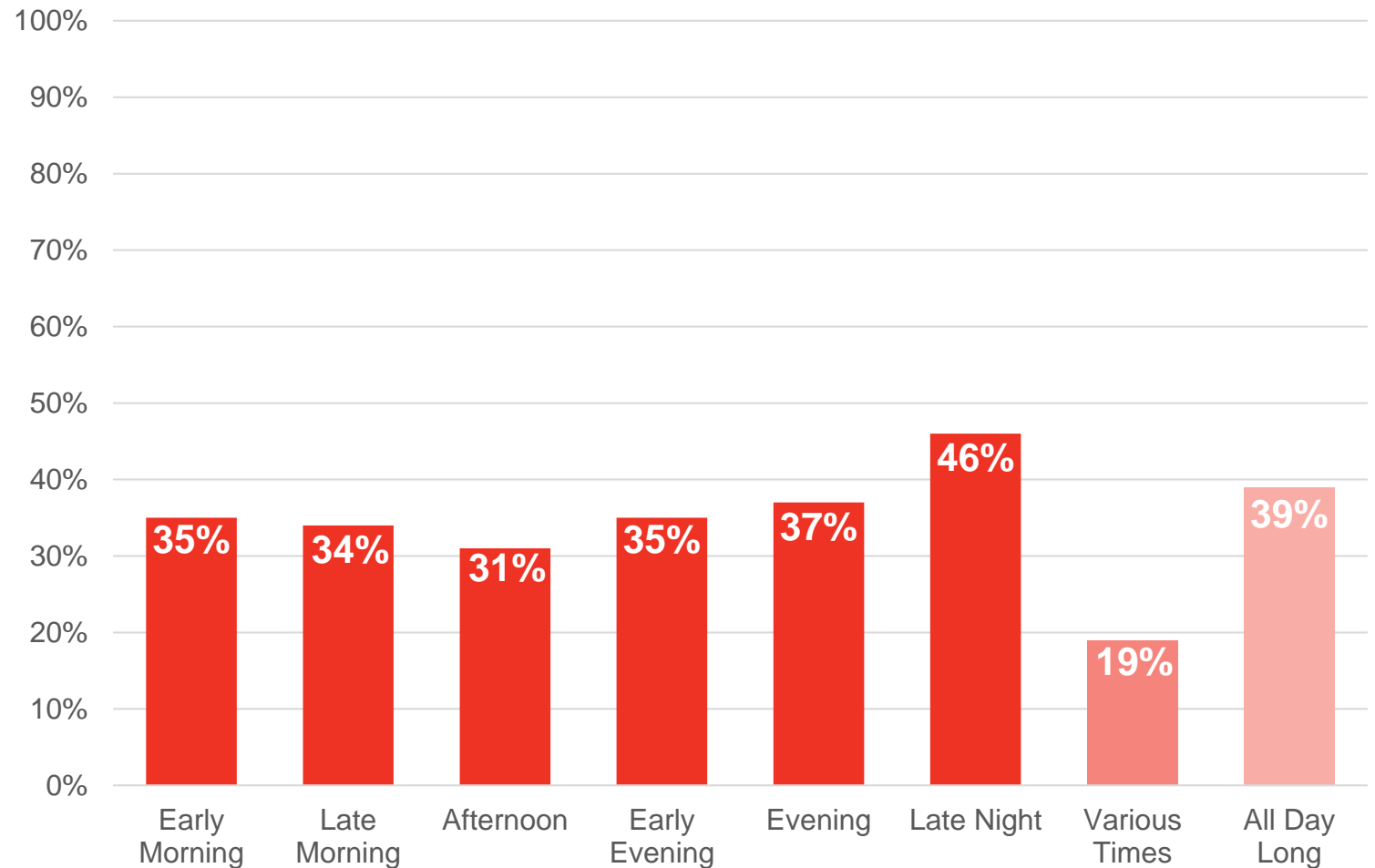
CHECK SOCIAL MEDIA: Engagements create value across day

Similarly, the **level of value** consumers report feeling when they **check social media** remains **largely consistent** throughout the day as well

Value Scale:

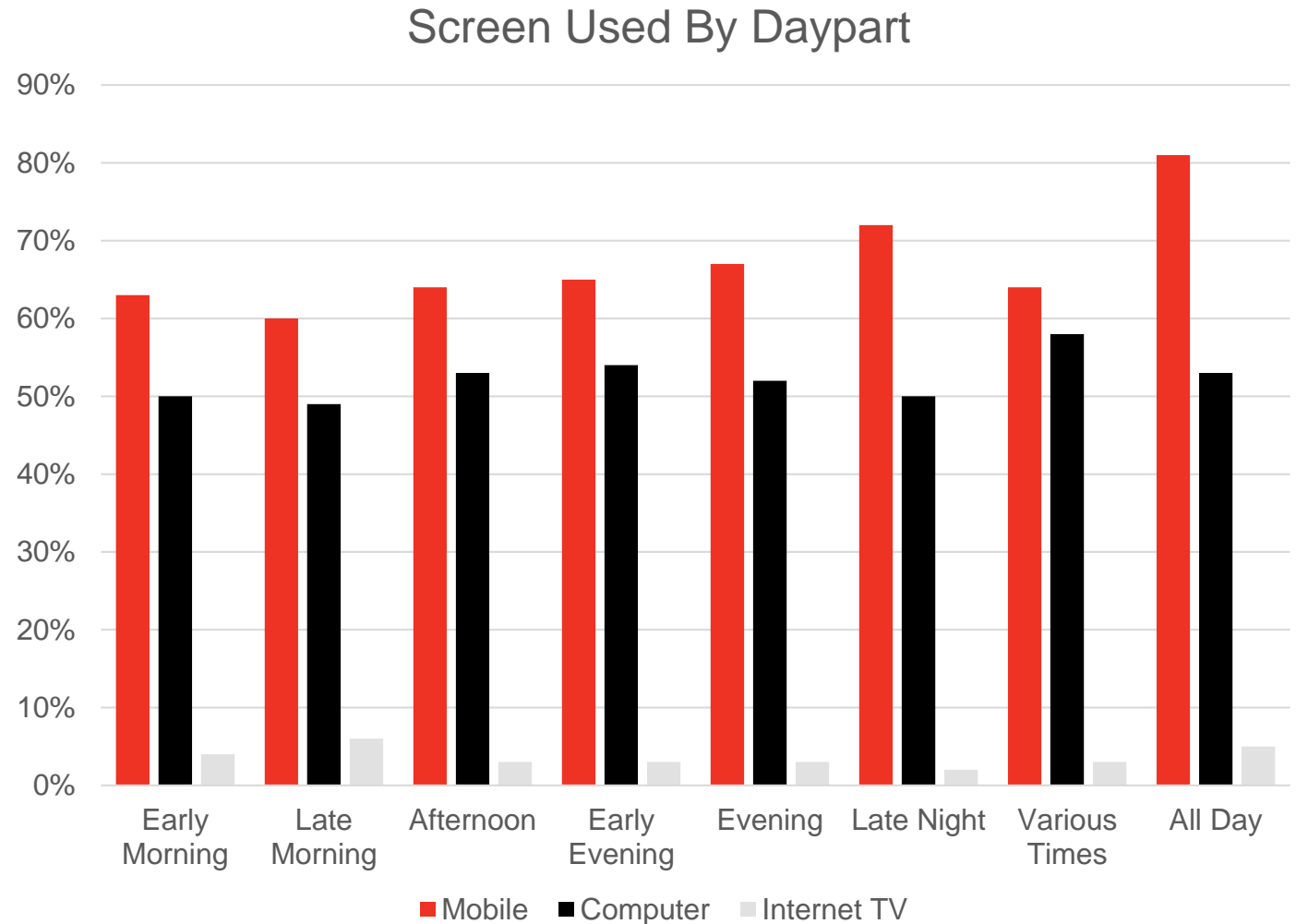
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



CHECK SOCIAL MEDIA: Mobile leads, but multiple screens are in play

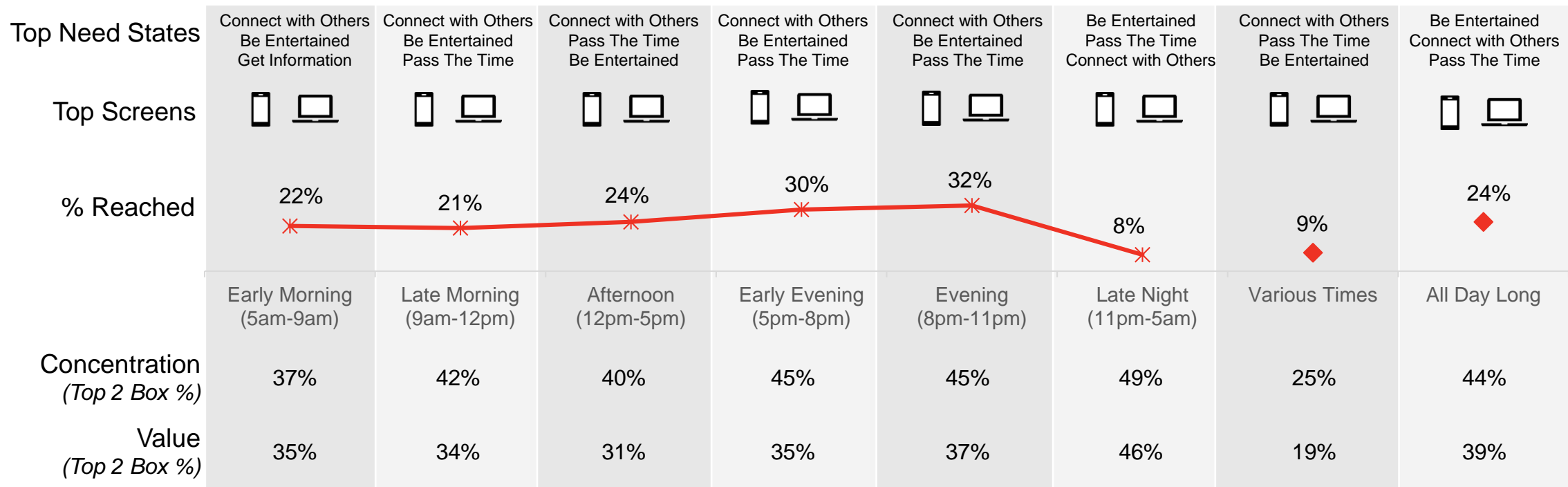
Mobile dominates social media checking throughout the day, but Computers and even Internet-Connected TVs also play a role across dayparts



CHECK SOCIAL MEDIA: Reach fluctuates, but engagement value is consistent across the day

➤ Check Social Media - Weekday

Among The 69% Of Consumers Who Regularly Check Social Media



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.

Q2a_WeekDayDaypart. Base: Selected activity at Q1.

Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.

Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.

IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

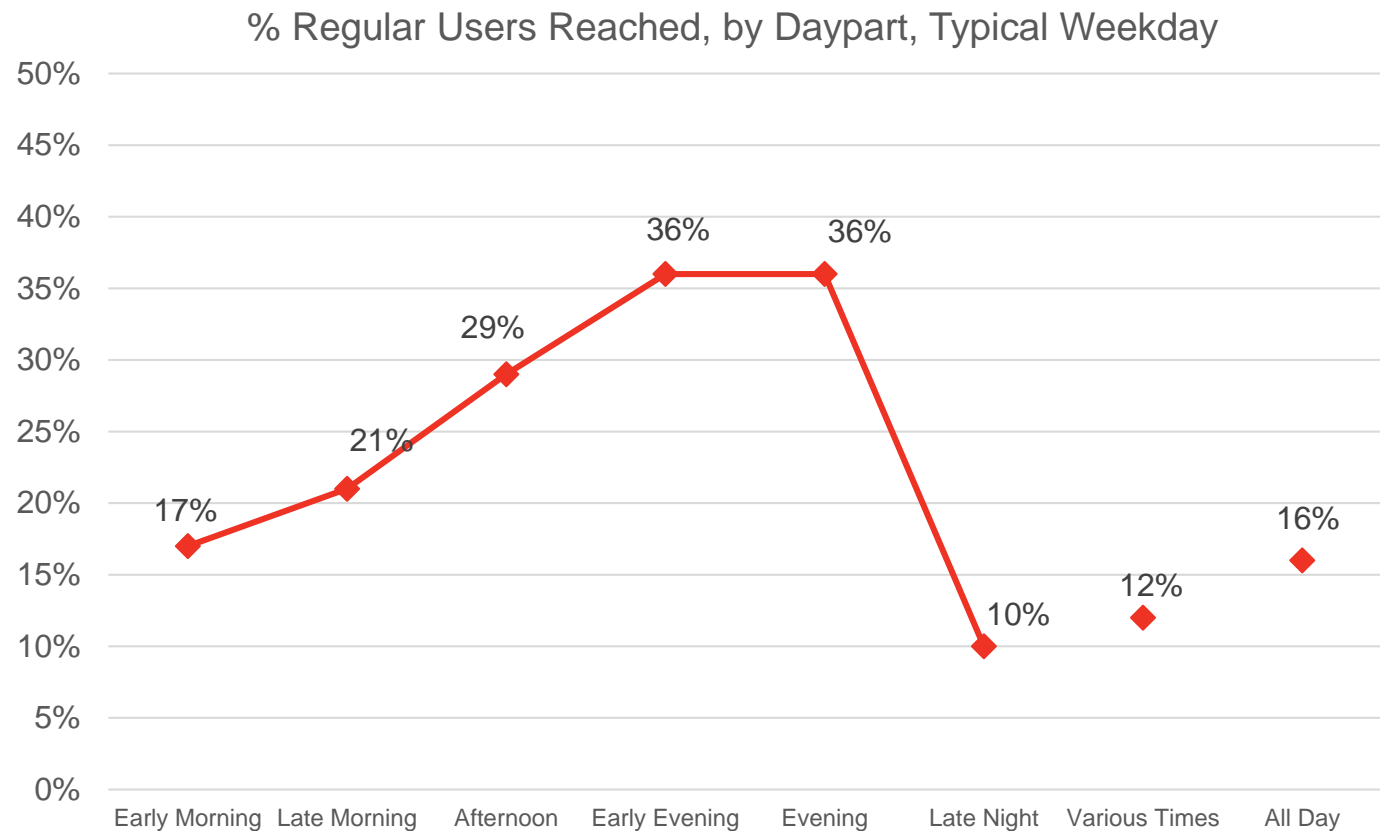
PERSONAL PRIME TIME: POST ON SOCIAL MEDIA

POST ON SOCIAL MEDIA: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

42%

of consumers say they **regularly** post on social media

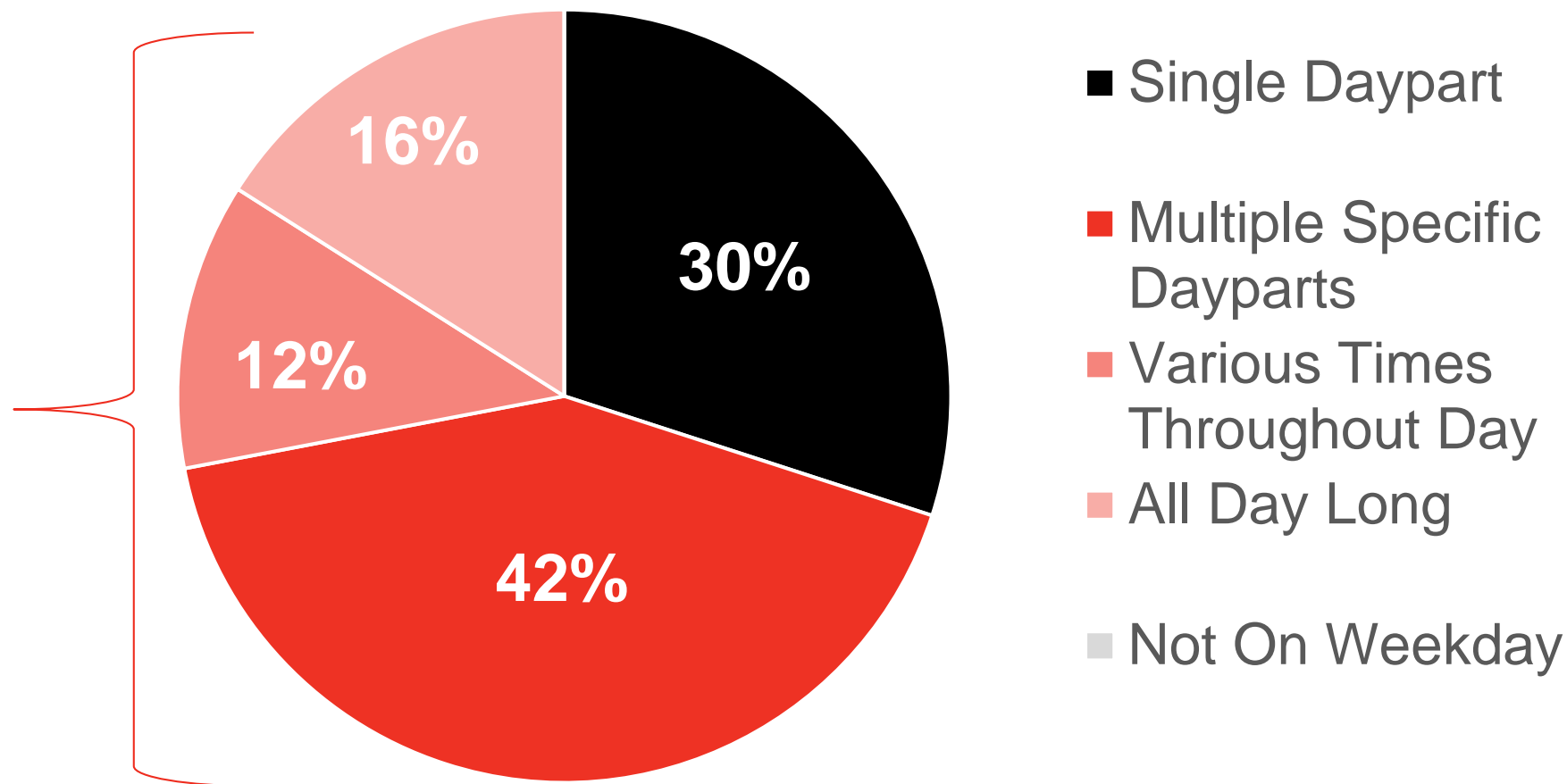


POST ON SOCIAL MEDIA: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

70%

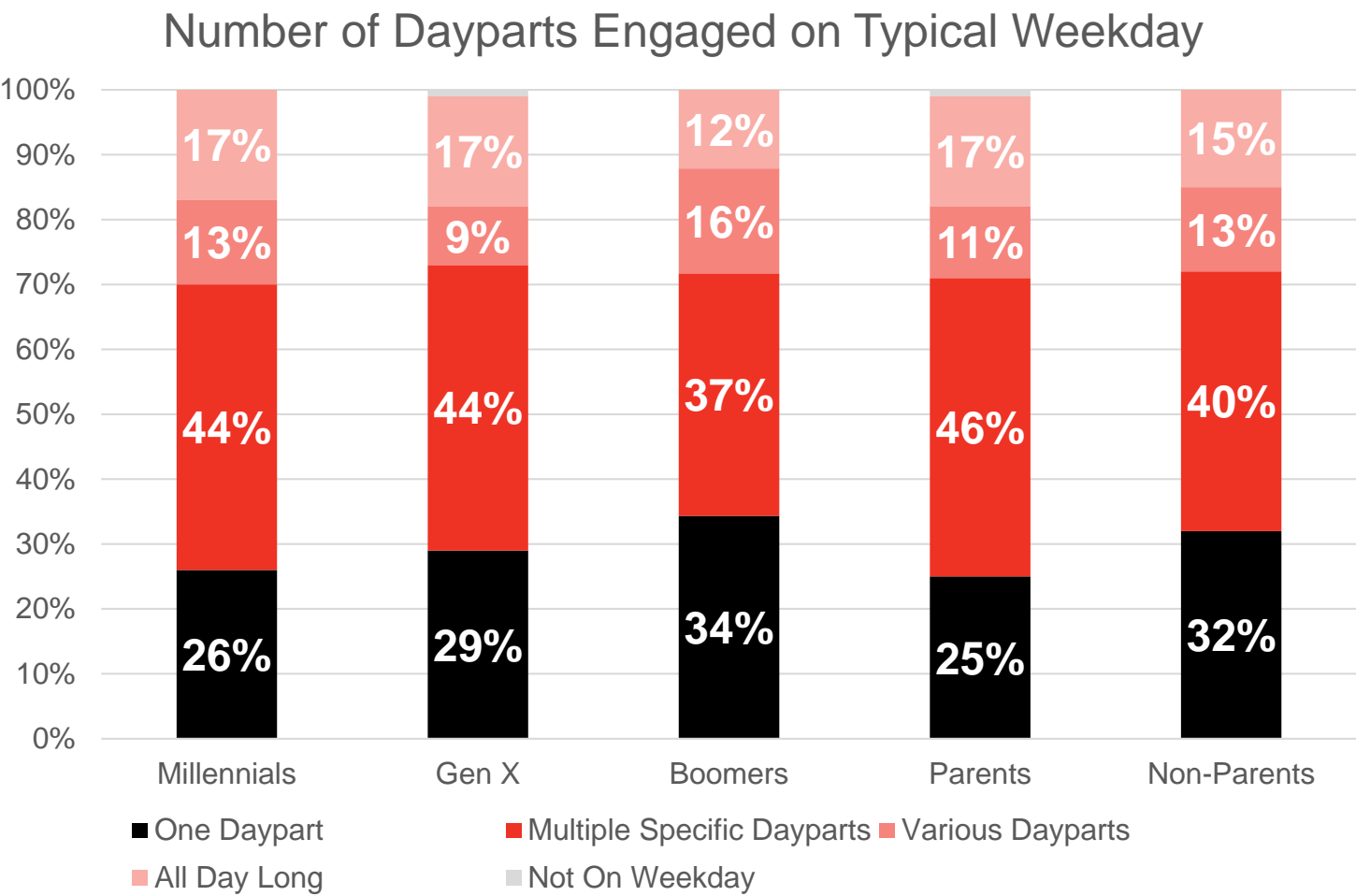
of consumers who say they regularly post on social media say they do so **multiple times** during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

POST ON SOCIAL MEDIA: Multiple engagements are a common pattern

The pattern of multiple engagements per weekday is **consistent** across generations and parental status



POST ON SOCIAL MEDIA: Need States drive the ‘why’ for each of these engagements

While **Connect with Others** is a consistent motivator for posting on social media, need states shift their overall mix throughout the day, with **Express Myself**, **Be Entertained**, and **Pass The Time** all playing different roles in consumer motivation across dayparts

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Connect with Others 58%	Be Entertained 37%	Express Myself 35%	Pass The Time 27%
Late Morning	Connect with Others 57%	Express Myself 46%	Be Entertained 37%	Pass The Time 31%
Afternoon	Connect with Others 58%	Express Myself 46%	Be Entertained 40%	Pass The Time 36%
Early Evening	Connect with Others 57%	Express Myself 52%	Be Entertained 39%	Pass The Time 37%
Evening	Connect with Others 59%	Express Myself 49%	Be Entertained 42%	Pass The Time 36%
Late Night	Connect with Others 51%	Express Myself 49%	Be Entertained 42%	Pass The Time 39%
Various Times	Connect with Others 67%	Express Myself 55%	Pass The Time 36%	Be Entertained 22%
All Day Long	Connect with Others 69%	Express Myself 60%	Be Entertained 49%	Pass The Time 34%

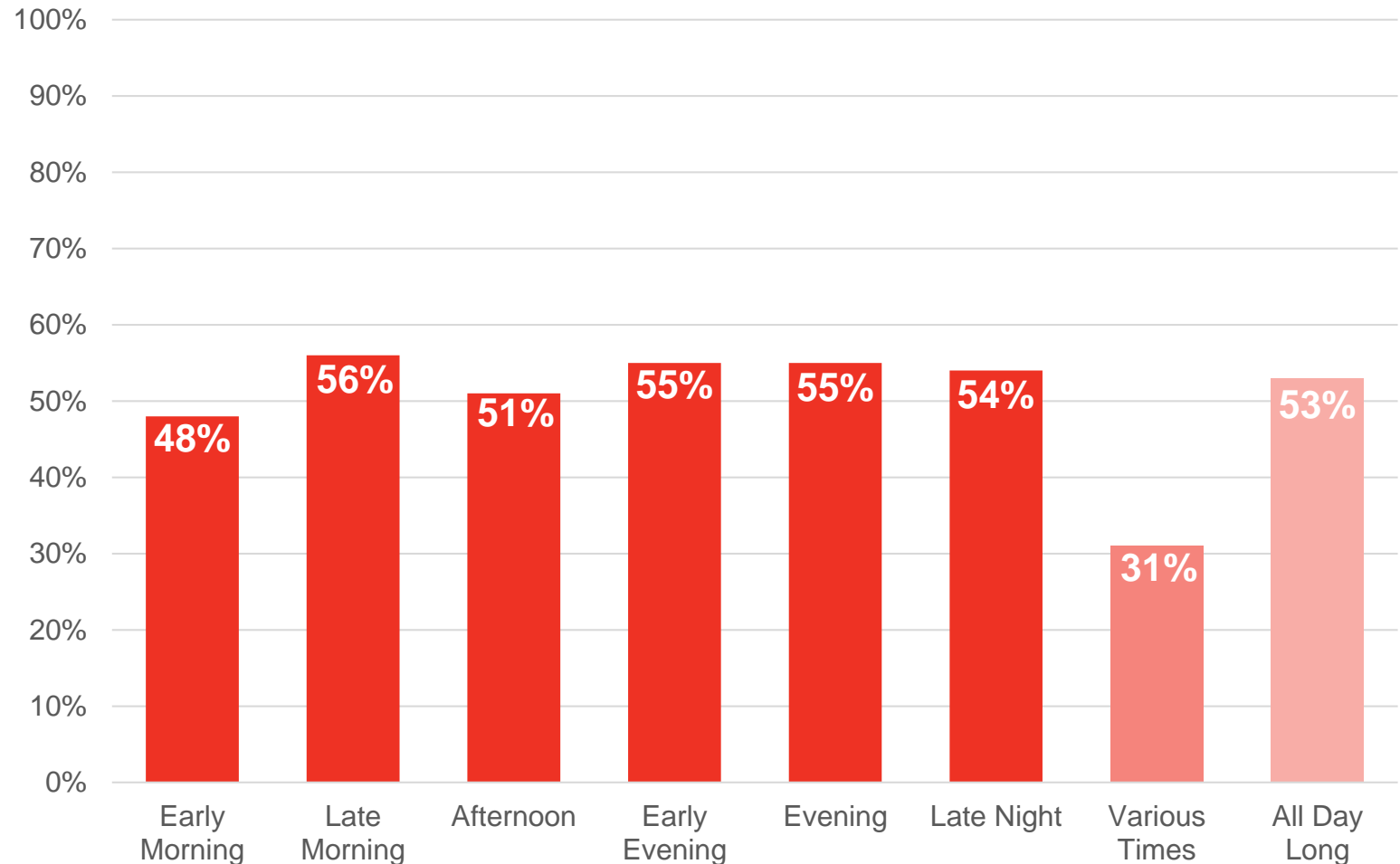
POST ON SOCIAL MEDIA: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when **post on social media** remains **largely consistent** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



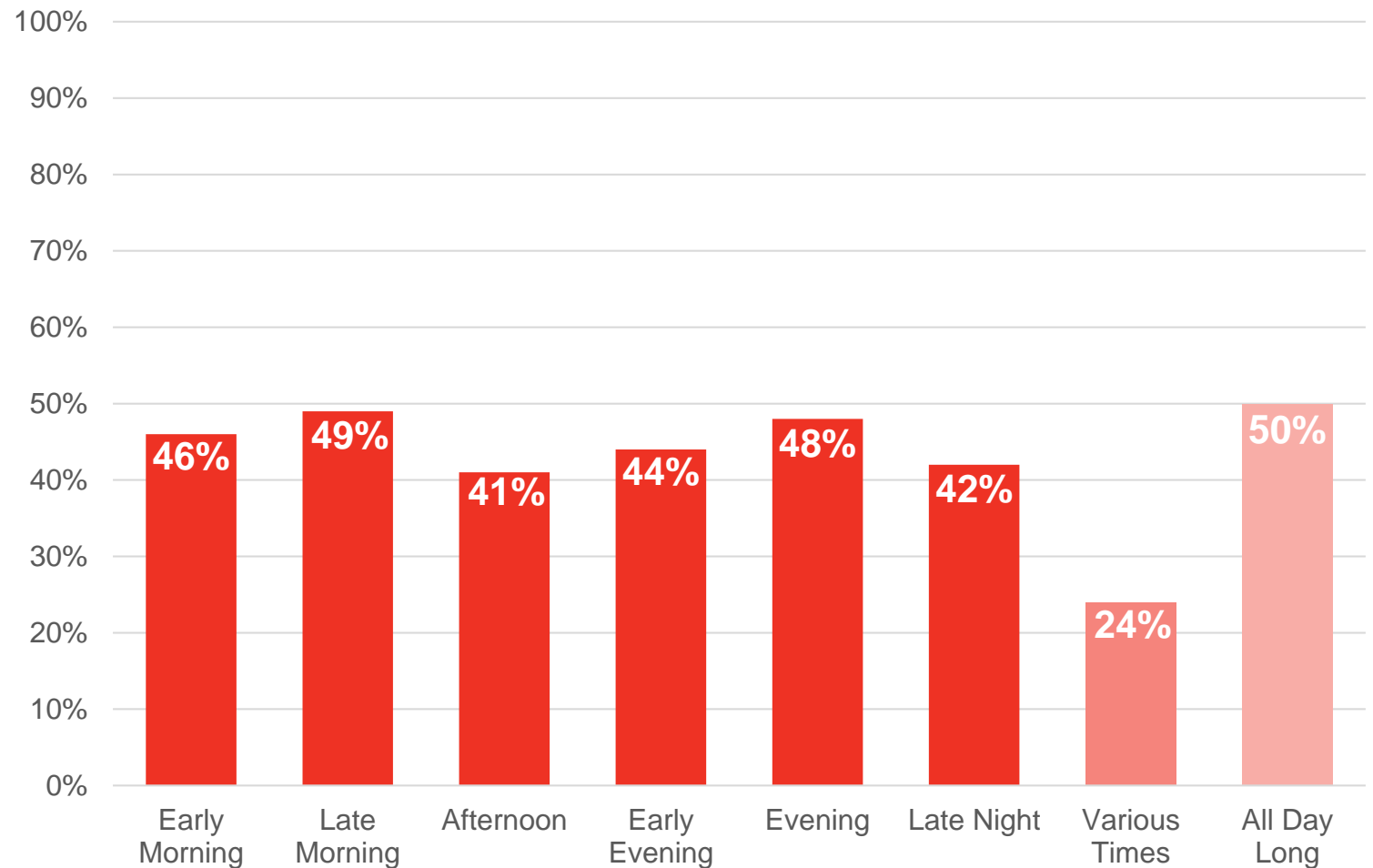
POST ON SOCIAL MEDIA: Engagements create value across day

Similarly, the **level of value** consumers report feeling when they **post on social media** remains largely **consistent** throughout the day

Value Scale:

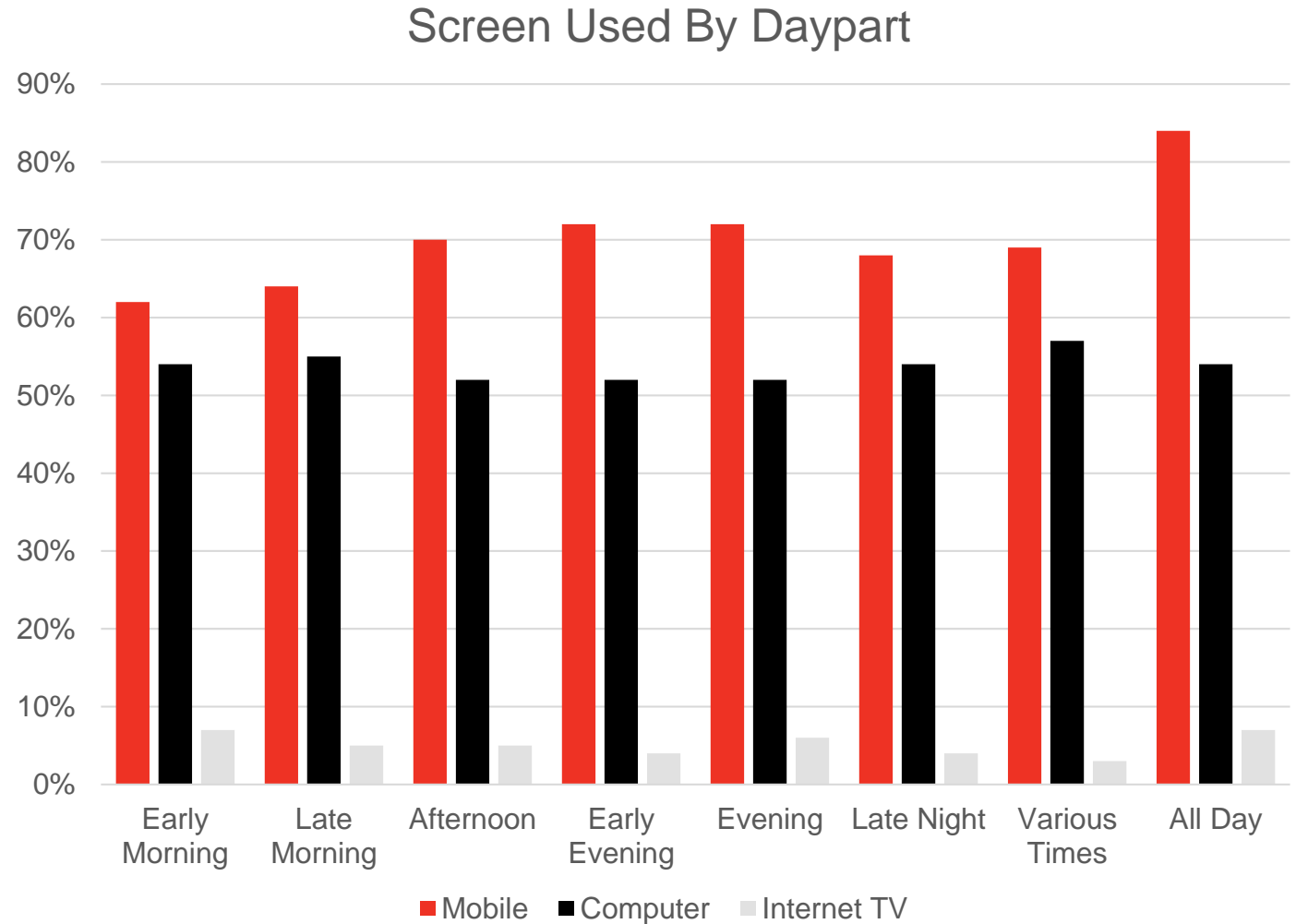
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



POST ON SOCIAL MEDIA: Mobile leads, but multiple screens are in play

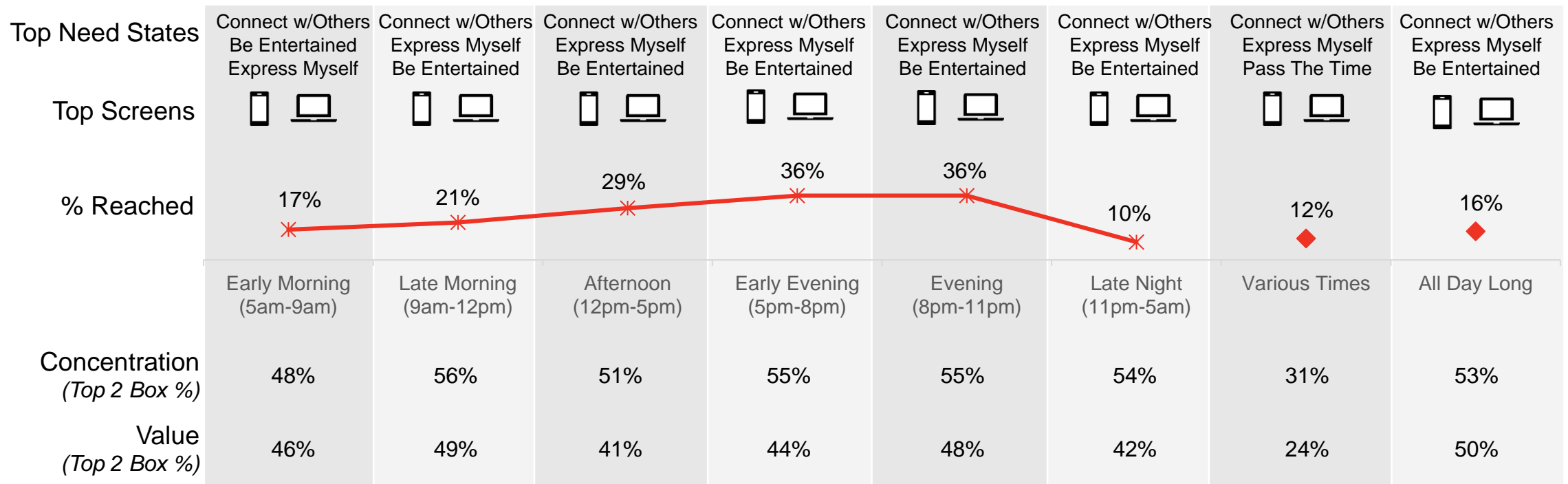
Mobile dominates social media posting throughout the day, but Computers and even Internet-Connected TVs also play a role



POST ON SOCIAL MEDIA: Reach fluctuates, but engagement value is consistent across the day

➤ Post On Social Media - Weekday

Among The 42% Of Consumers Who Regularly Post On Social Media



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.

Q2a_WeekDayDaypart. Base: Selected activity at Q1.

Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.

Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.

IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

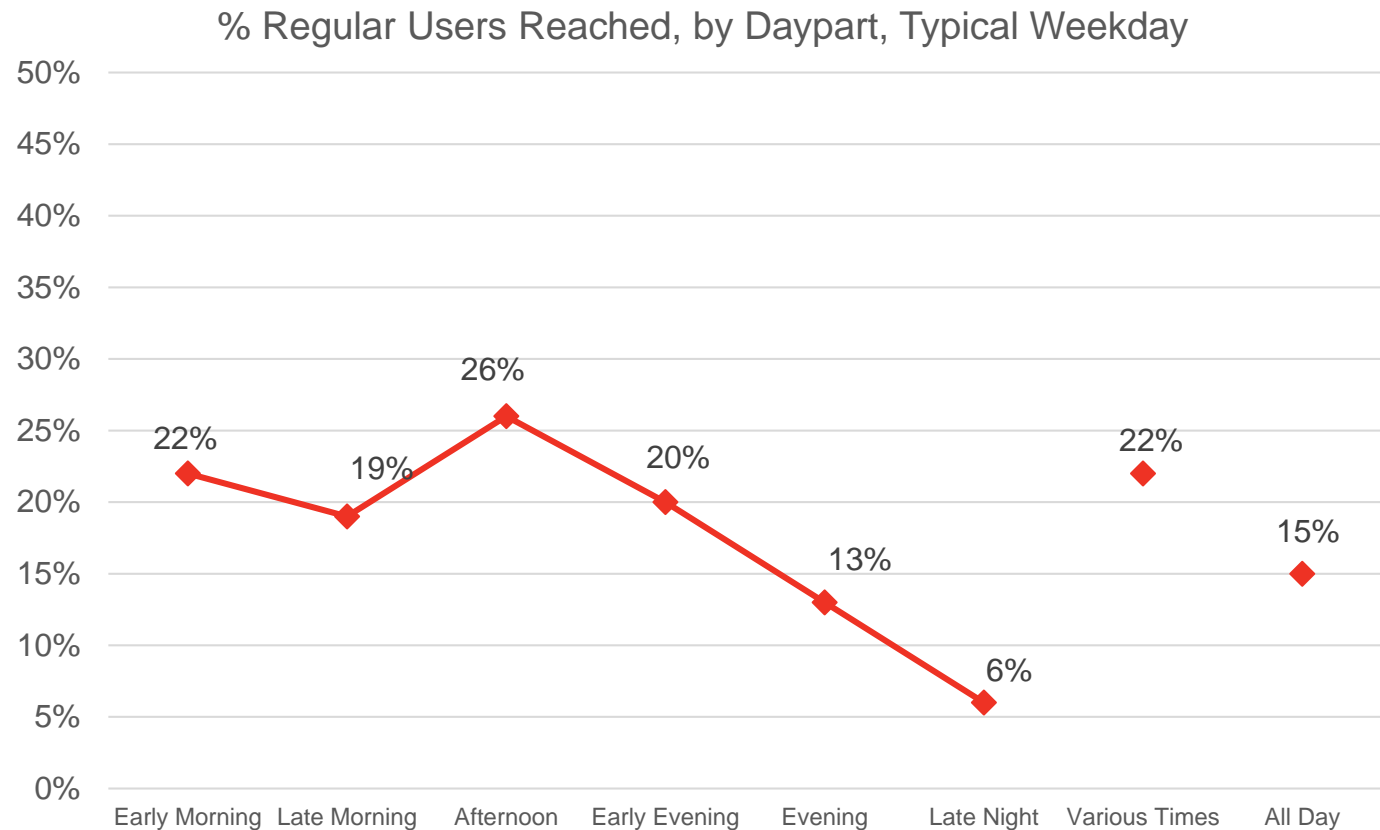
PERSONAL PRIME TIME: LISTEN TO MUSIC

LISTEN TO MUSIC: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

74%

of consumers say they
regularly listen to
music

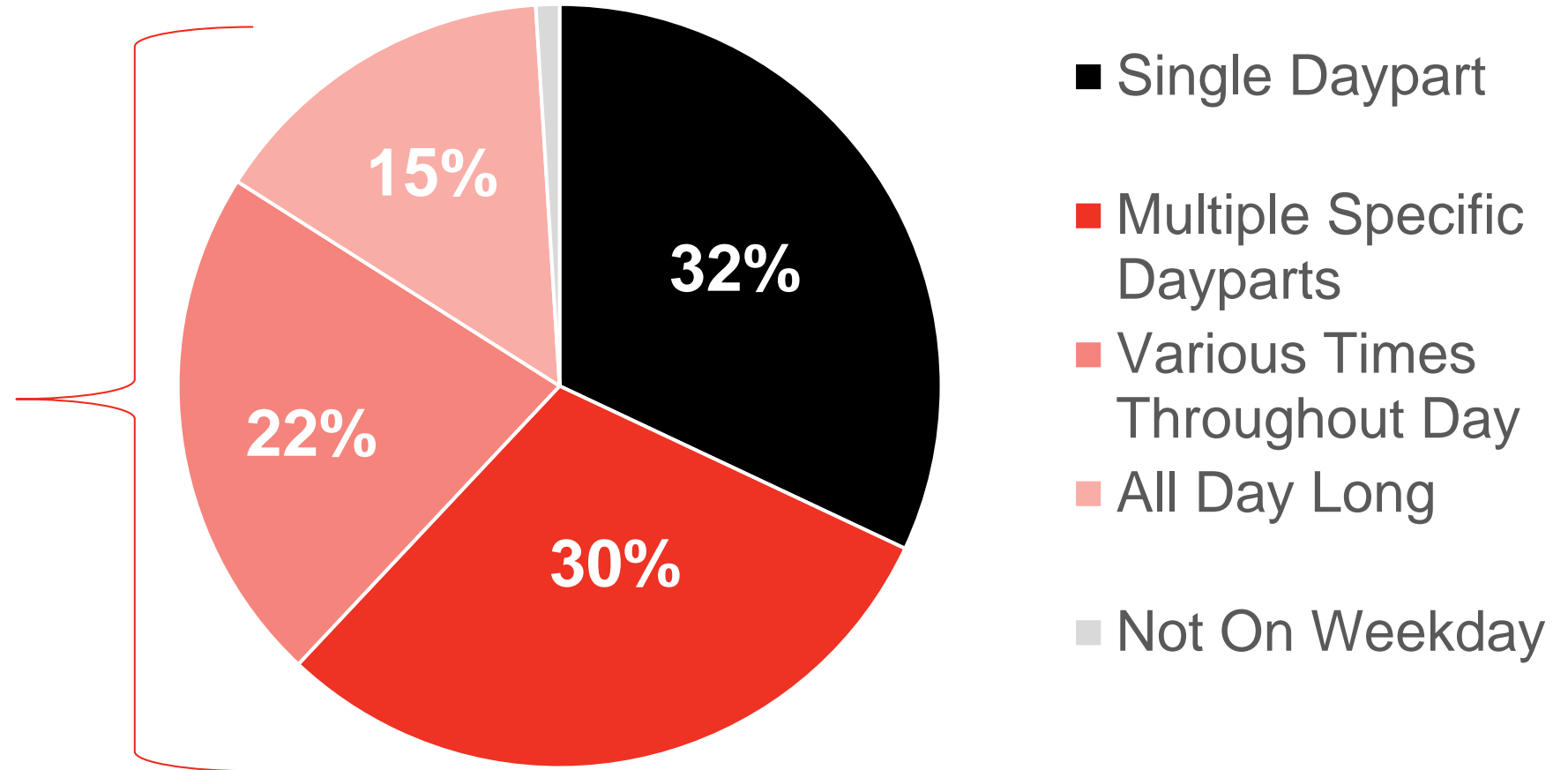


LISTEN TO MUSIC: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

67%

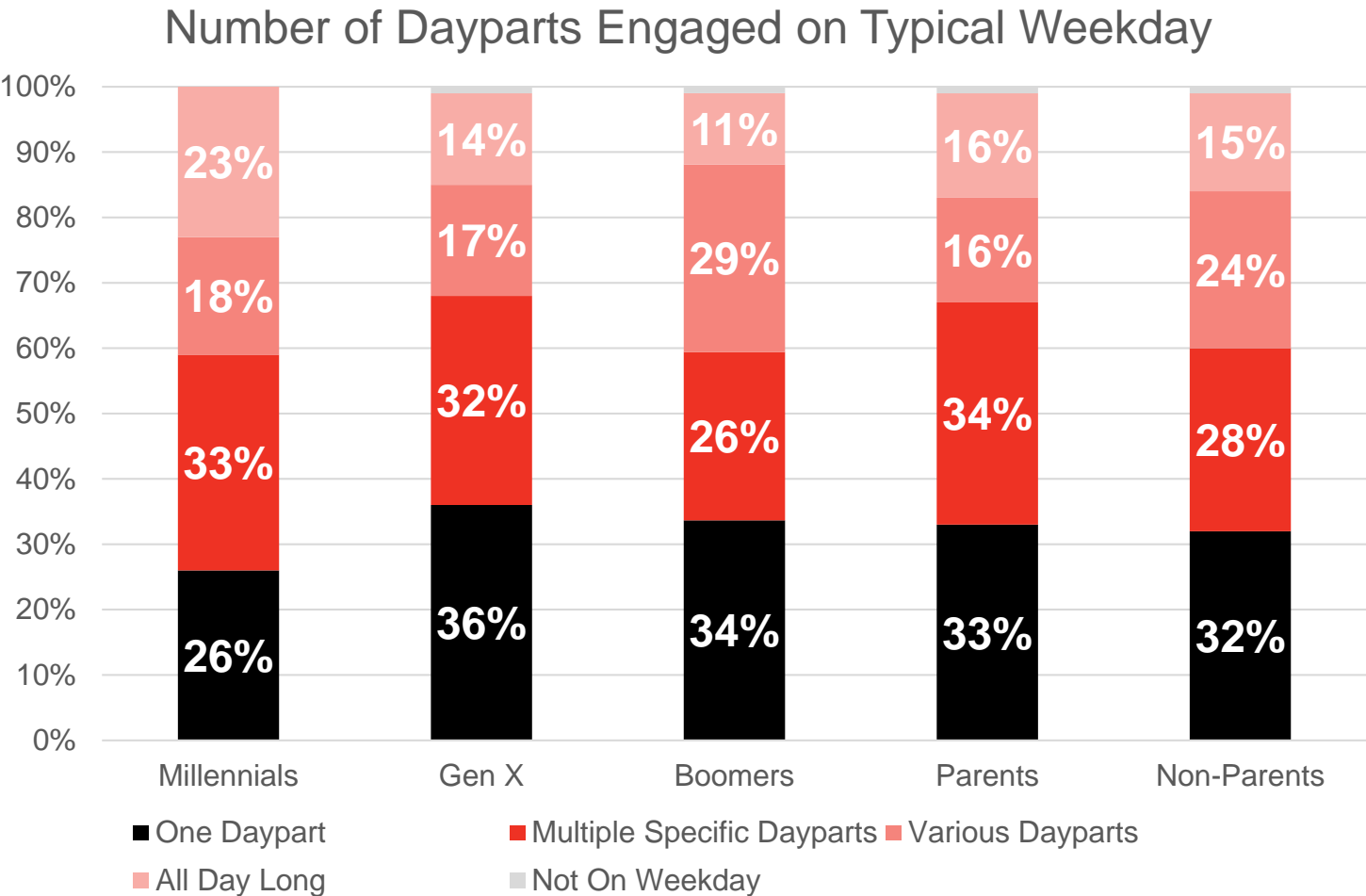
of consumers who say they regularly listen to music say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

LISTEN TO MUSIC: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



LISTEN TO MUSIC: Need States drive the 'why' for each of these engagements

Music's need state mix is largely consistent, and focused on **Be Entertained. Take Care of Self** is present in Early Morning, and the relative weights of **Pass The Time, Take A Break**, and **Express Myself** shift as the day progresses

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Be Entertained 75%	Pass The Time 42%	Take A Break 18%	Take Care of Self 9%
Late Morning	Be Entertained 72%	Pass The Time 37%	Take A Break 17%	Express Myself 12%
Afternoon	Be Entertained 76%	Pass The Time 35%	Take A Break 20%	Express Myself 15%
Early Evening	Be Entertained 76%	Pass The Time 38%	Take A Break 27%	Express Myself 16%
Evening	Be Entertained 75%	Pass The Time 32%	Take A Break 27%	Express Myself 15%
Late Night	Be Entertained 67%	Pass The Time 28%	Take A Break 20%	Express Myself 12%
Various Times	Be Entertained 85%	Pass The Time 32%	Take A Break 24%	Express Myself 10%
All Day Long	Be Entertained 83%	Pass The Time 48%	Take A Break 37%	Express Myself 35%

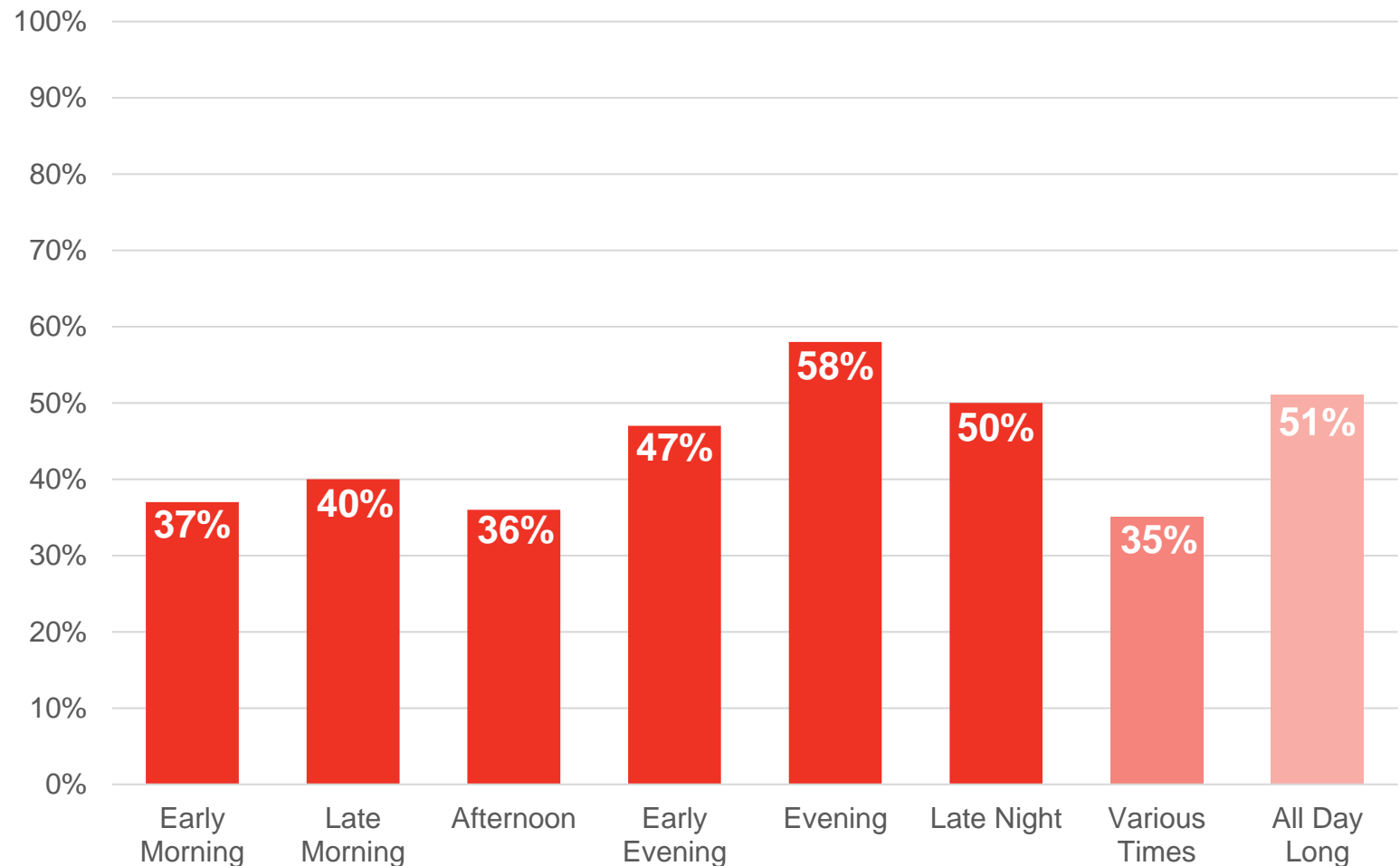
LISTEN TO MUSIC: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they **listen to music** peaks in the evening and late night, but is **significant** in various dayparts throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



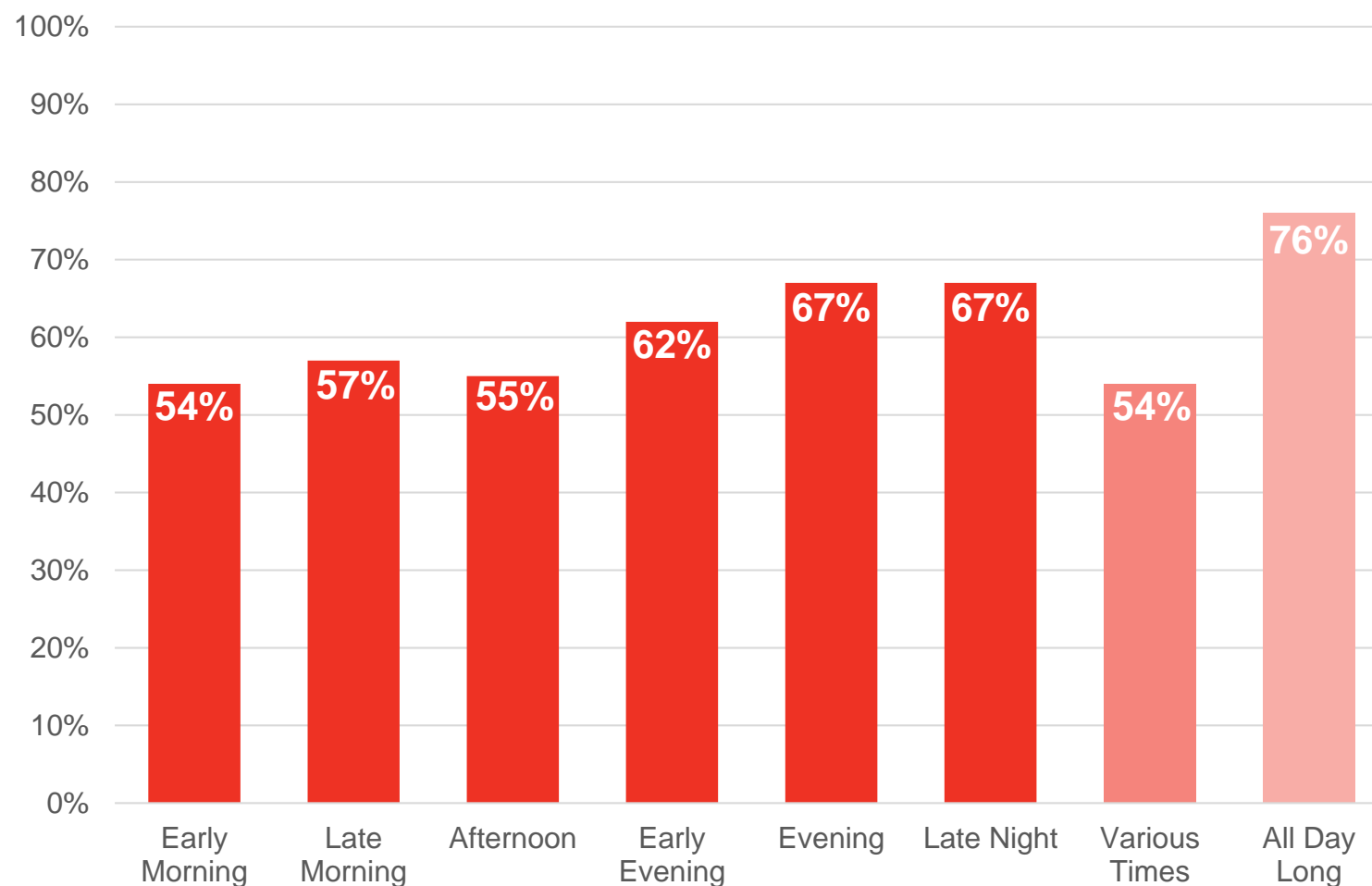
LISTEN TO MUSIC: Engagements create value across day

The **level of value** consumers report feeling when they listen to music remains **strong** and **largely consistent** throughout the day

Value Scale:

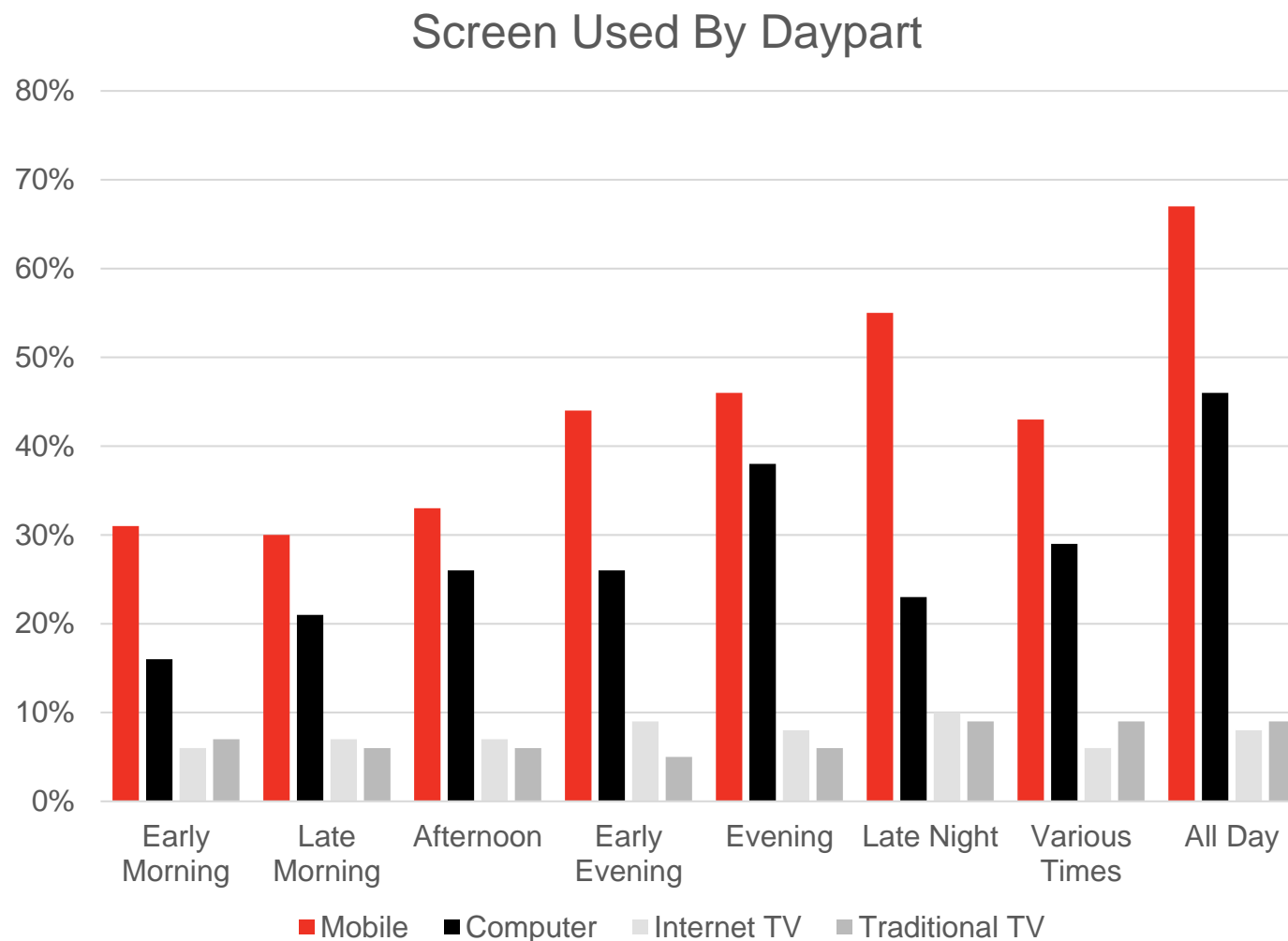
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



LISTEN TO MUSIC: Mobile leads, but multiple screens are in play

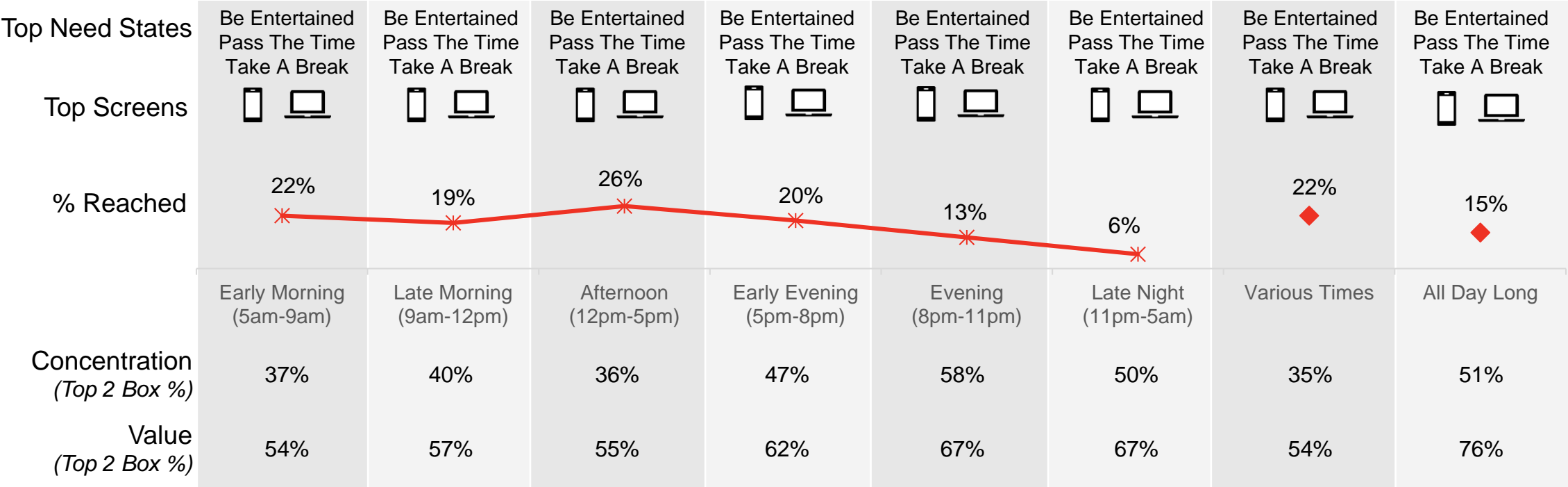
Consumers who say they **listen to music** regularly during weekdays most often turn to their **Mobile** device to do so. **Computers** are increasingly in play as the day progresses as well.



LISTEN TO MUSIC: Reach fluctuates, but engagement value is consistent across the day

Listen To Music - Weekday

Among The 74% Of Consumers Who Regularly Listen To Music



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.
Q2a_WeekDayDaypart. Base: Selected activity at Q1.
Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.
Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.
IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

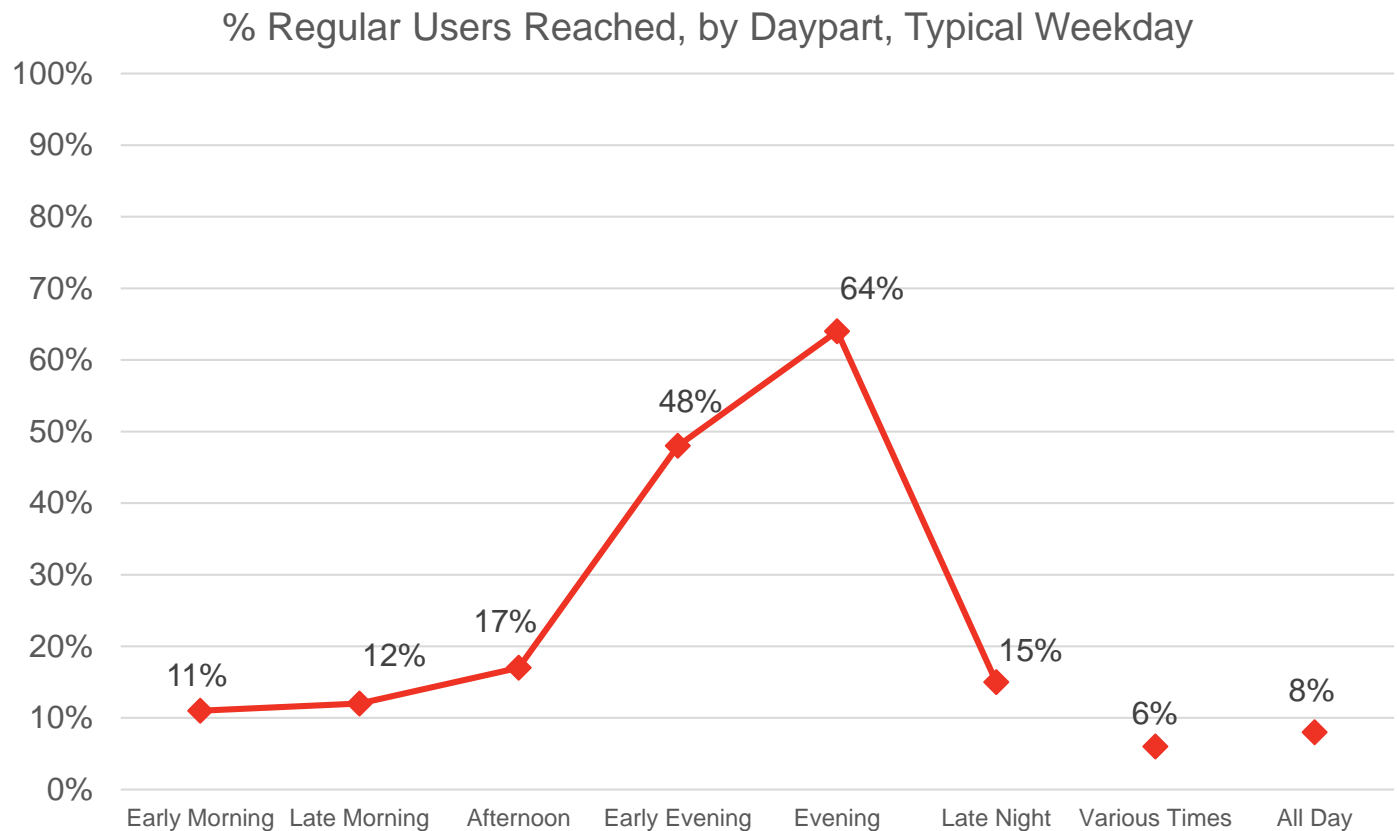
PERSONAL PRIME TIME: WATCH SHOWS/EPISODES

WATCH SHOWS/EPISODES: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

75%

of consumers say they **regularly** watch shows/episodes

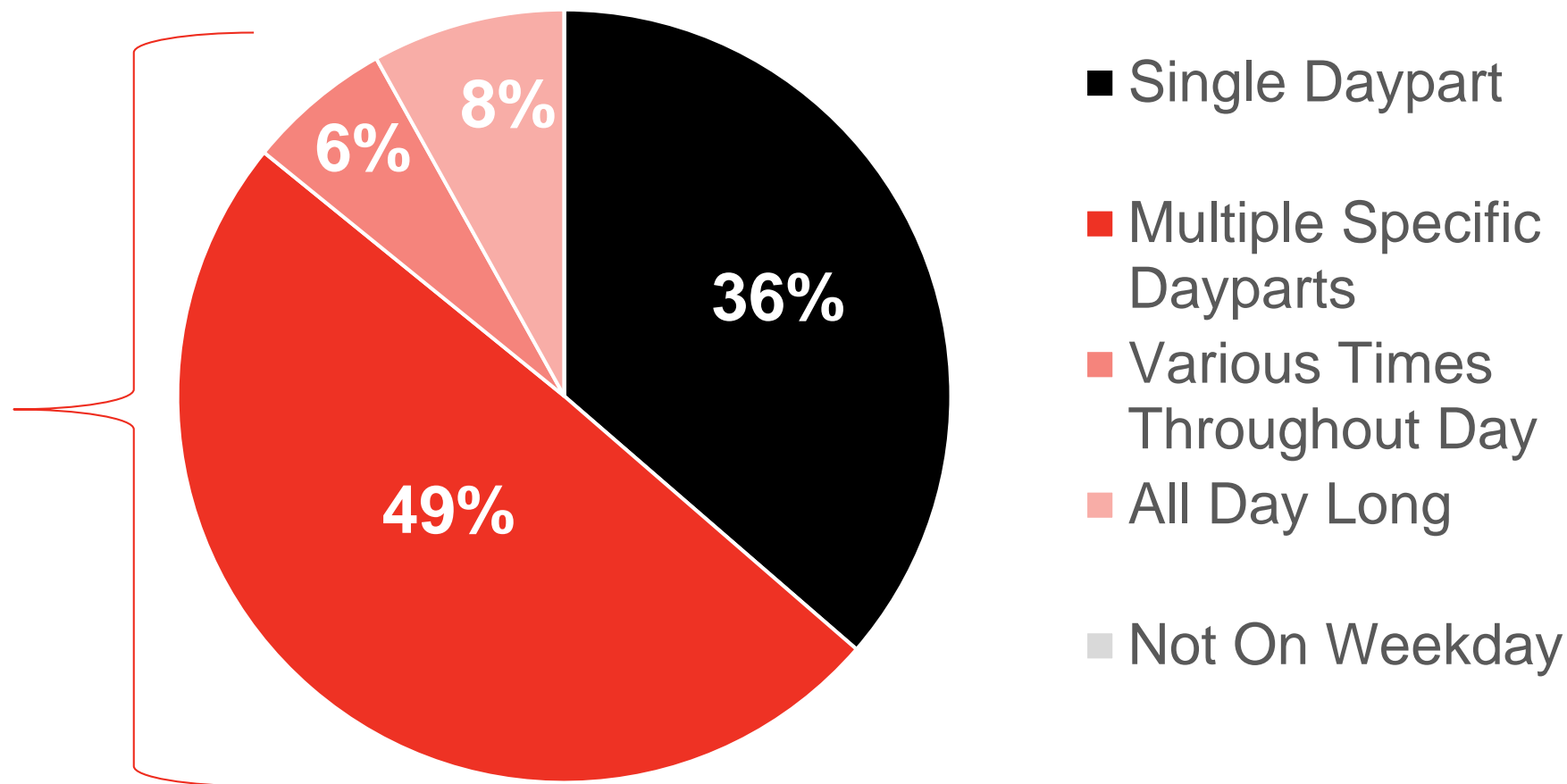


WATCH SHOWS/EPISODES: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

63%

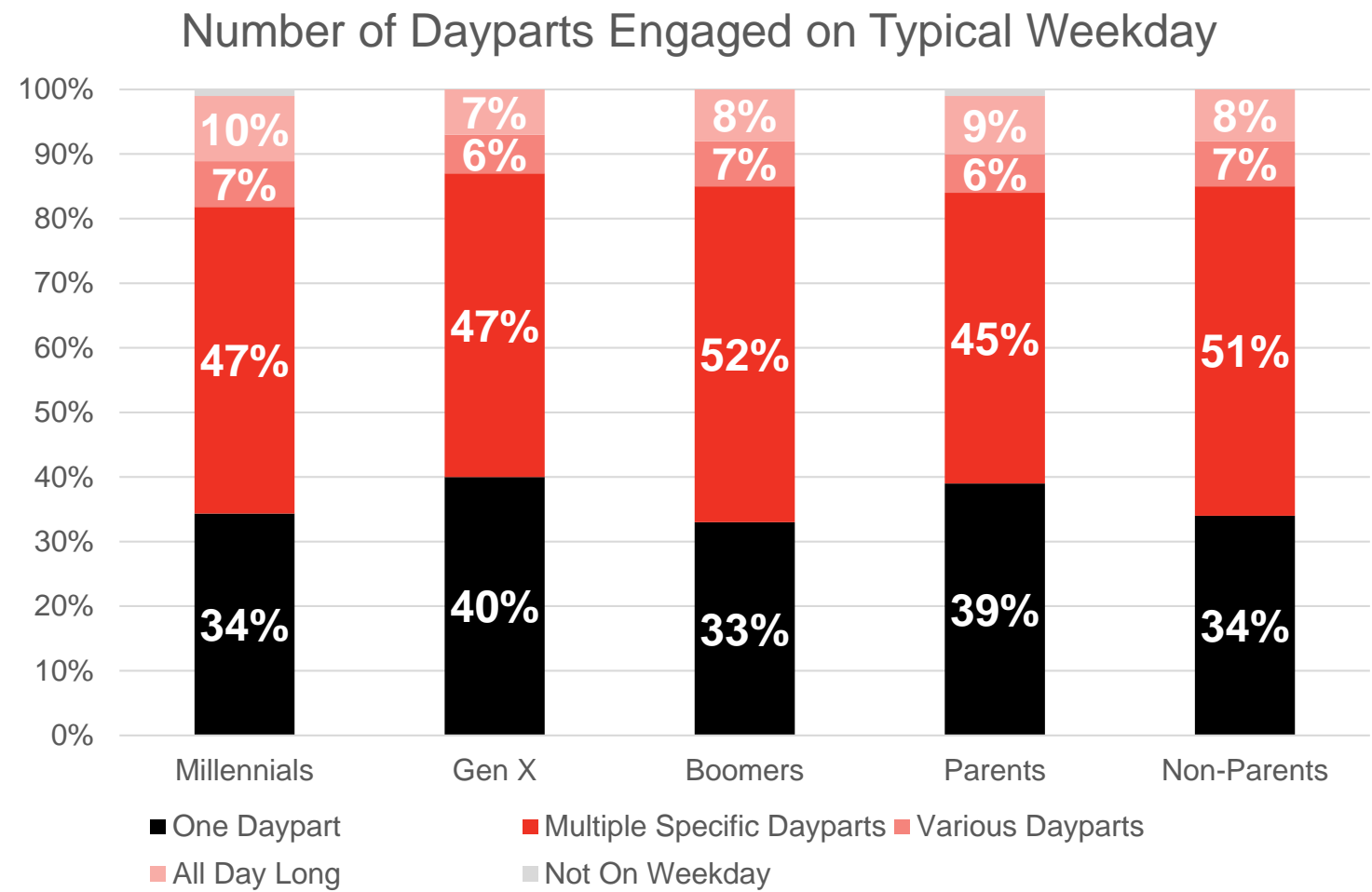
of consumers who say they regularly watch shows/episodes say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

WATCH SHOWS/EPISODES: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



WATCH SHOWS/EPIISODES: Need States drive the ‘why’ for each of these engagements

Early Mornings are about **Get Information**, while in the rest of the day **Be Entertained** dominates. **Learn** and **Get Information** change up the mix throughout the day

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Get Information 48%	Be Entertained 41%	Pass The Time 34%	Learn 28%
Late Morning	Be Entertained 66%	Pass The Time 38%	Get Information 28%	Learn 22%
Afternoon	Be Entertained 69%	Pass The Time 38%	Take A Break 32%	Get Information 18%
Early Evening	Be Entertained 74%	Pass The Time 35%	Take A Break 27%	Get Information 23%
Evening	Be Entertained 83%	Pass The Time 34%	Take A Break 27%	Get Information 15%
Late Night	Be Entertained 83%	Pass The Time 36%	Take A Break 31%	Get Information 21%
Various Times	Be Entertained 86%	Pass The Time 37%	Take A Break 33%	Learn 18%
All Day Long	Be Entertained 80%	Pass The Time 59%	Take A Break 27%	Learn 25%

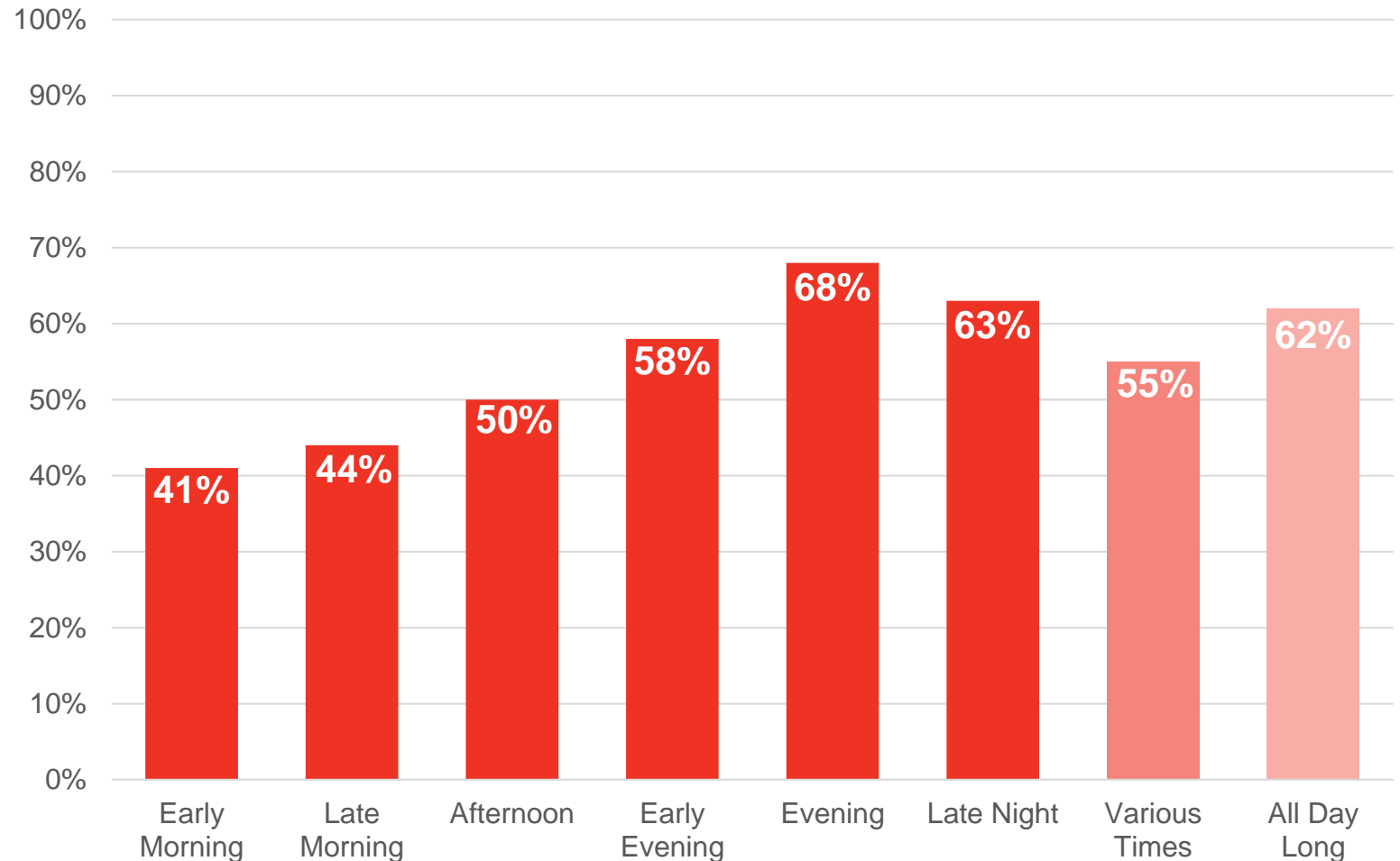
WATCH SHOWS/EPISODES: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when **watch shows/episodes** builds **towards evening**, but shows strength in **multiple dayparts** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



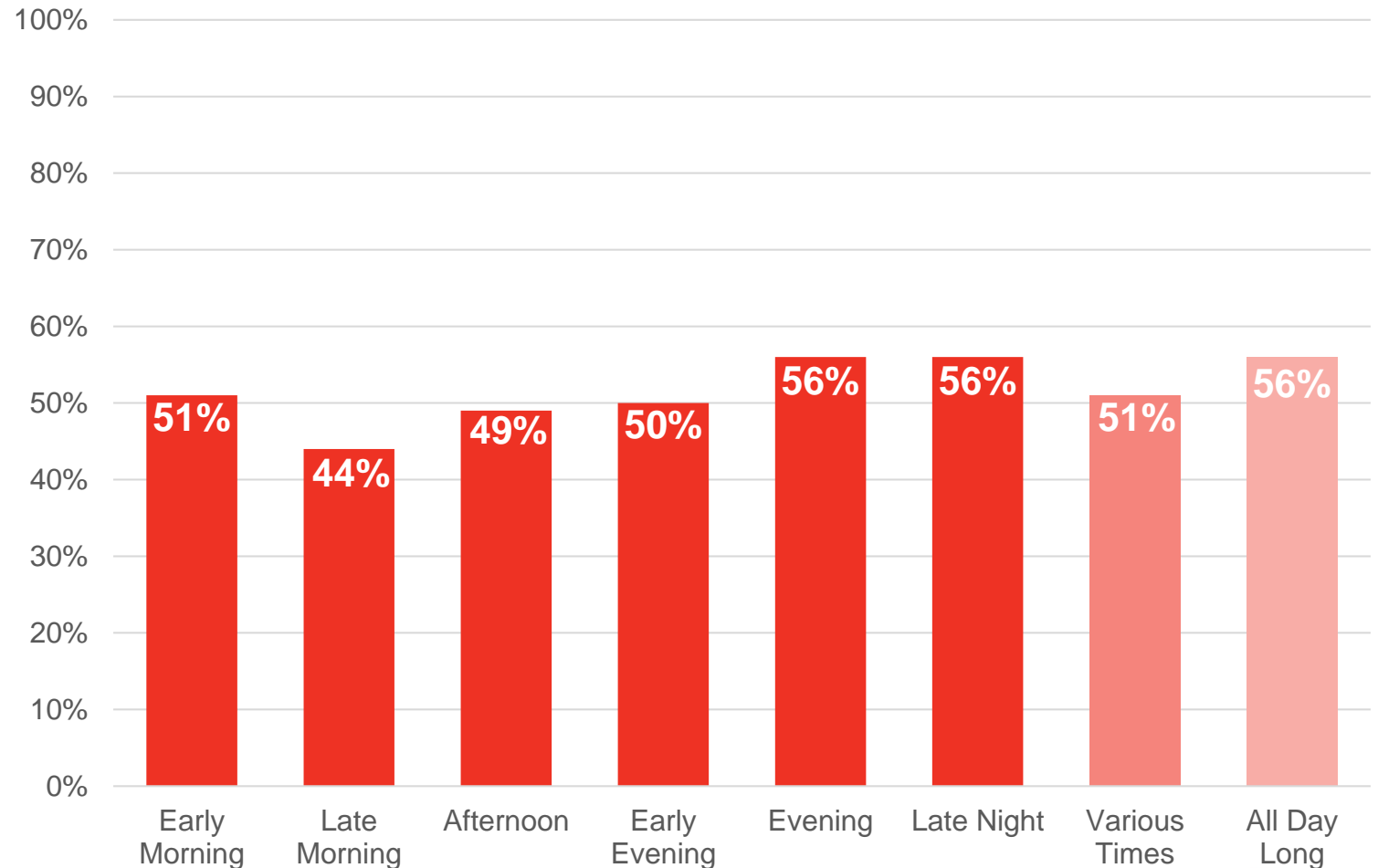
WATCH SHOWS/EPISODES: Engagements create value across day

Though concentration levels build throughout the day, the **level of value** consumers report feeling when they **watch shows/episodes** remains largely **consistent** throughout the day

Value Scale:

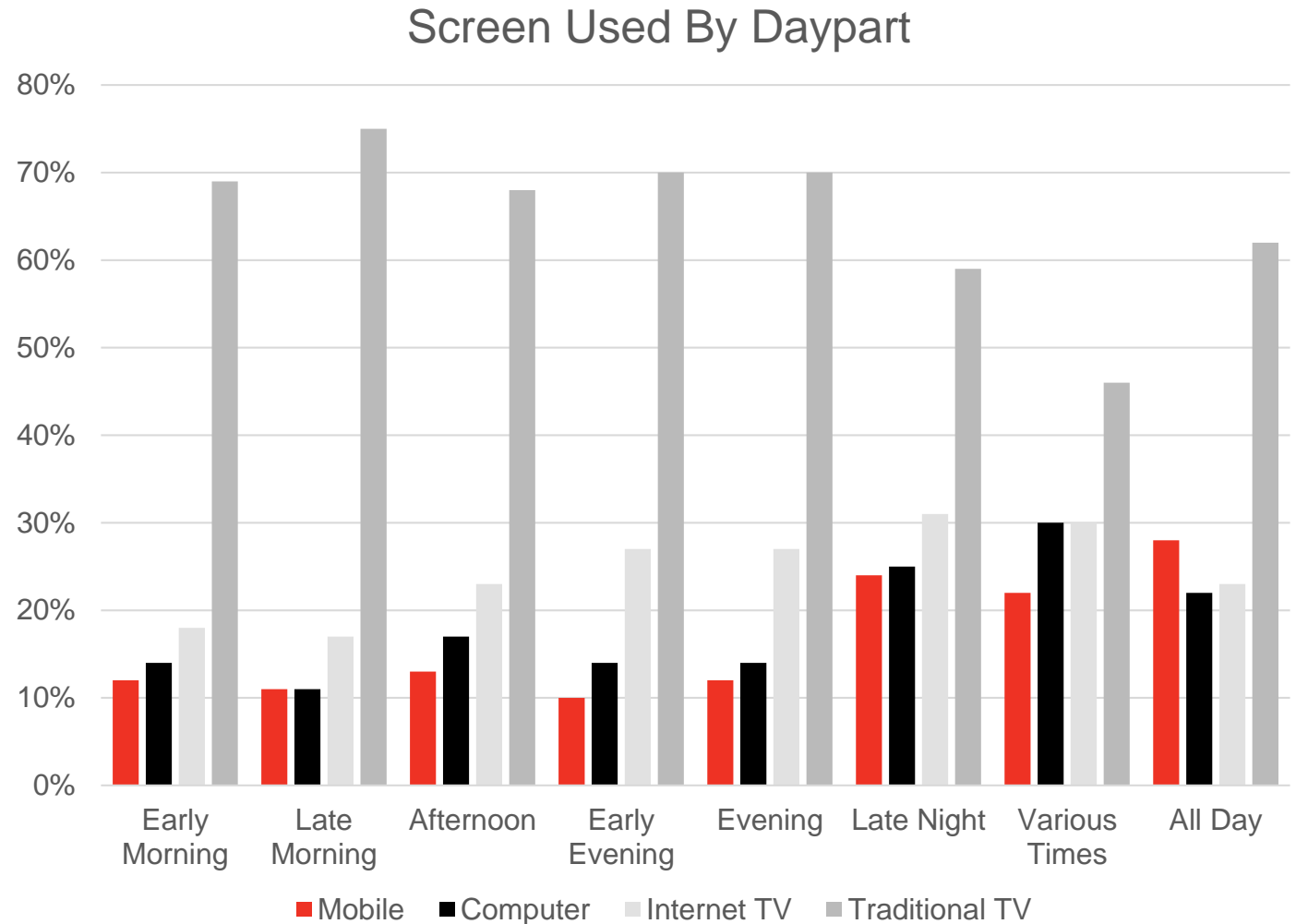
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



WATCH SHOWS/EPISODES: Traditional TV leads, but all screens are in play

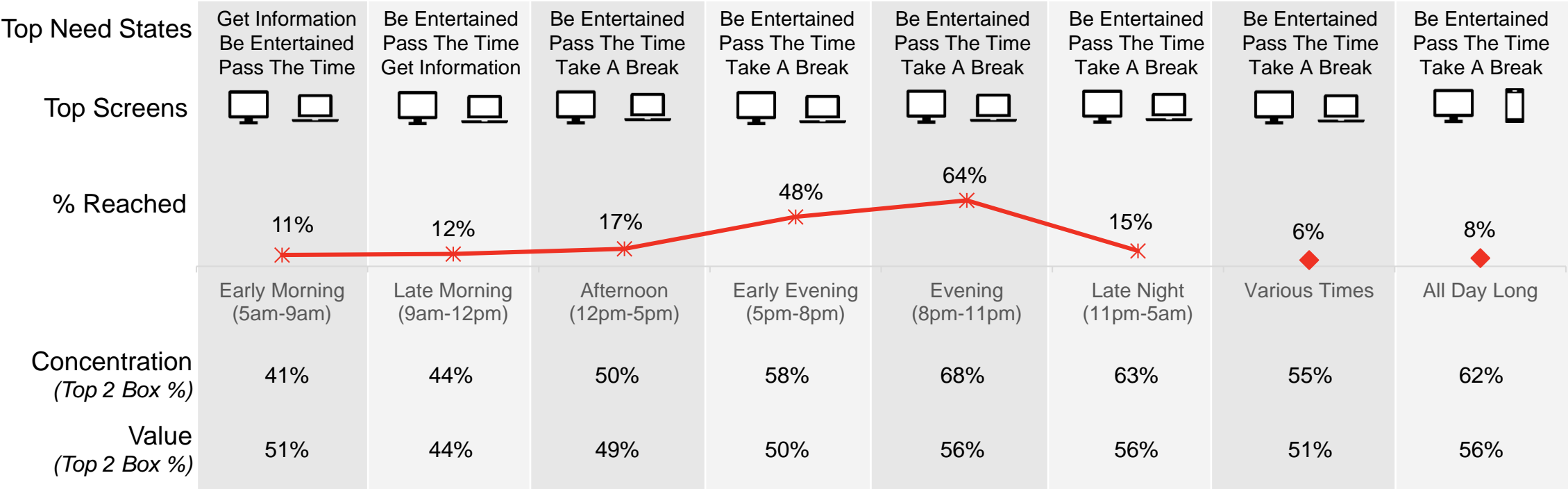
Traditional TV (including cable/satellite, broadcast, live or VOD/DVR) is still the main way the majority of people say they regularly **watch shows/episodes**, but significant audiences are regularly leveraging **digital screens** throughout the day as well



WATCH SHOWS/EPISODES: Reach fluctuates, but engagement value is consistent across the day

Watch Shows/Episodes - Weekday

Among The 75% Of Consumers Who Regularly Watch Shows/Episodes



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.
Q2a_WeekDayDaypart. Base: Selected activity at Q1.
Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.
Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.
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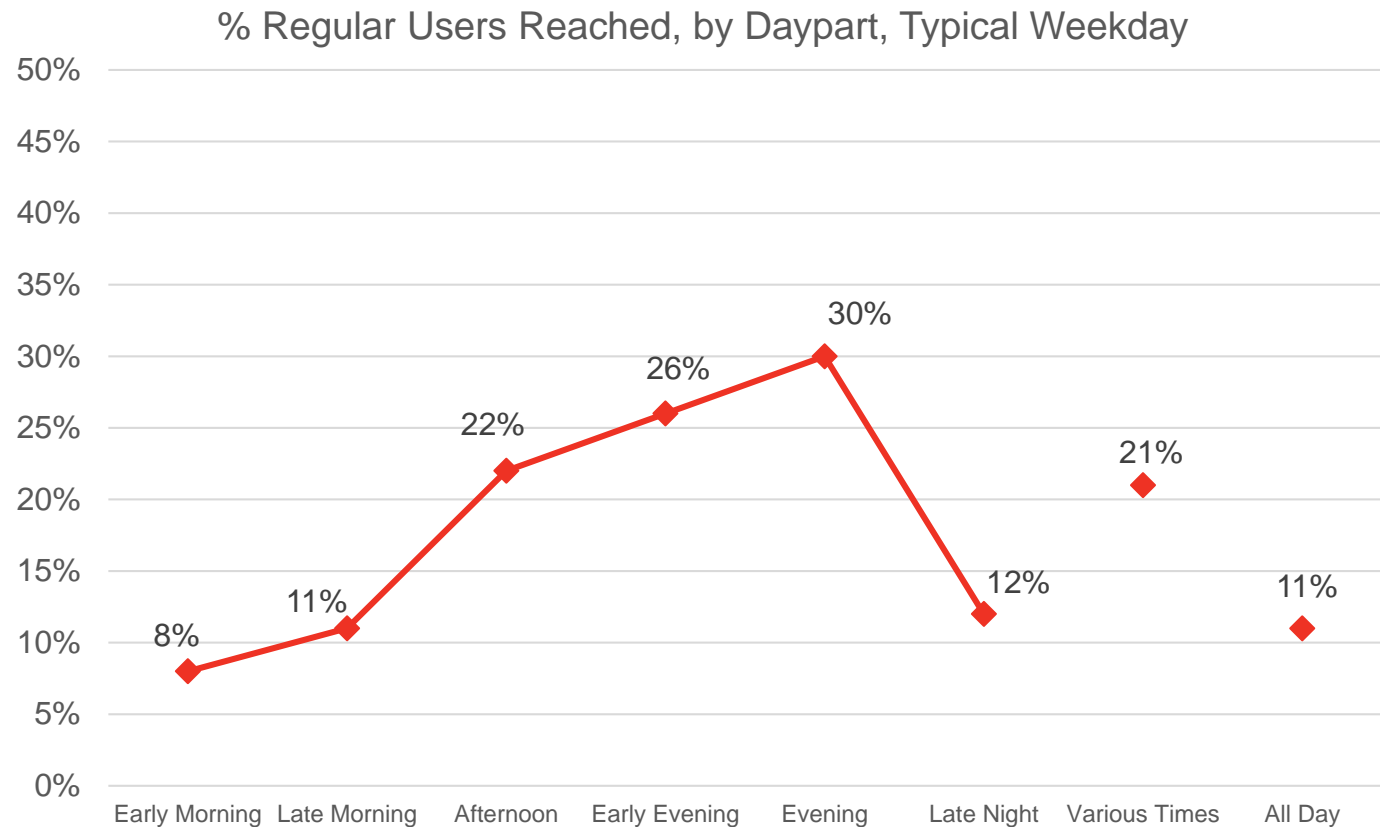
PERSONAL PRIME TIME: WATCH SHORT VIDEOS

WATCH SHORT VIDEOS: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

52%

of consumers say they **regularly** watch short videos

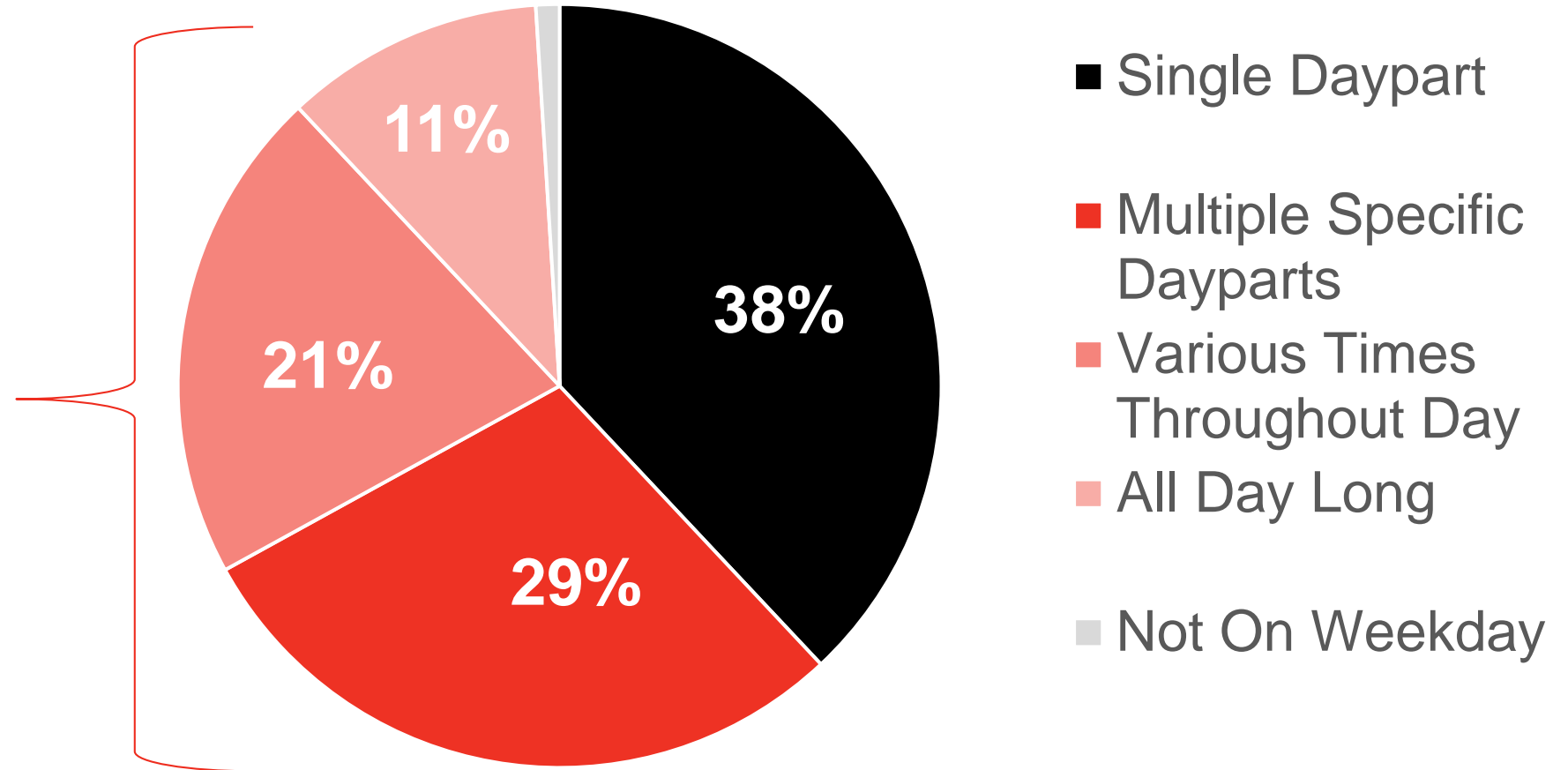


WATCH SHORT VIDEOS: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

61%

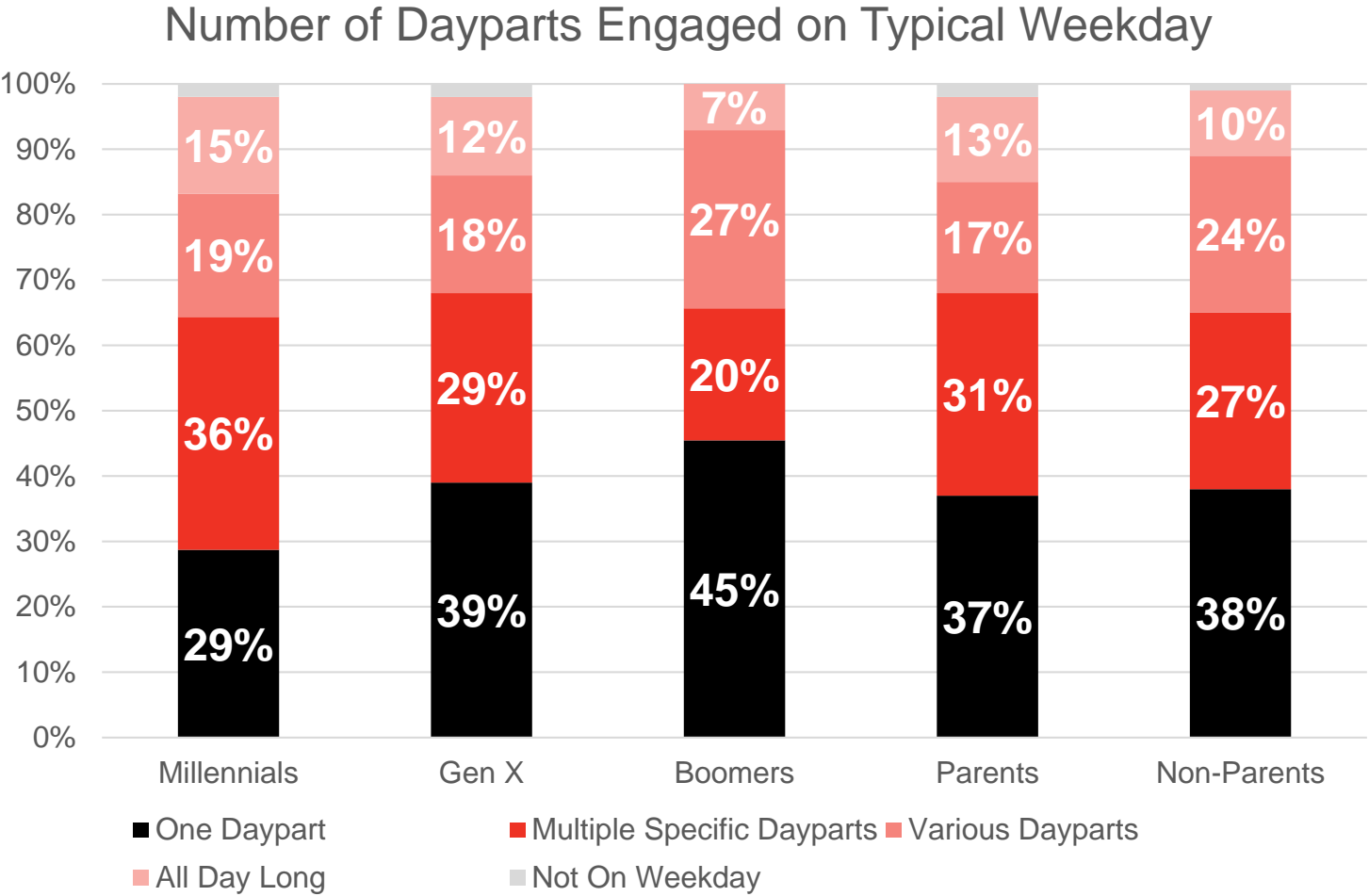
of consumers who say they regularly watch short videos say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

WATCH SHORT VIDEOS: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



WATCH SHORT VIDEOS: Need States drive the ‘why’ for each of these engagements

Be Entertained is the primary need state for consumers who watch short videos regularly. **Pass The Time, Learn, Get Information, and Take A Break** all shift the need state mix throughout the day

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Be Entertained 68%	Pass The Time 37%	Learn 32%	Take A Break 28%
Late Morning	Be Entertained 73%	Learn 36%	Pass The Time 34%	Get Information 33%
Afternoon	Be Entertained 74%	Pass The Time 38%	Learn 32%	Take A Break 32%
Early Evening	Be Entertained 77%	Pass The Time 40%	Take A Break 33%	Learn 24%
Evening	Be Entertained 81%	Take A Break 36%	Pass The Time 34%	Learn 25%
Late Night	Be Entertained 81%	Pass The Time 40%	Take A Break 34%	Learn 29%
Various Times	Be Entertained 78%	Pass The Time 35%	Learn 31%	Take A Break 27%
All Day Long	Be Entertained 81%	Pass The Time 52%	Take A Break 41%	Get Information 32%

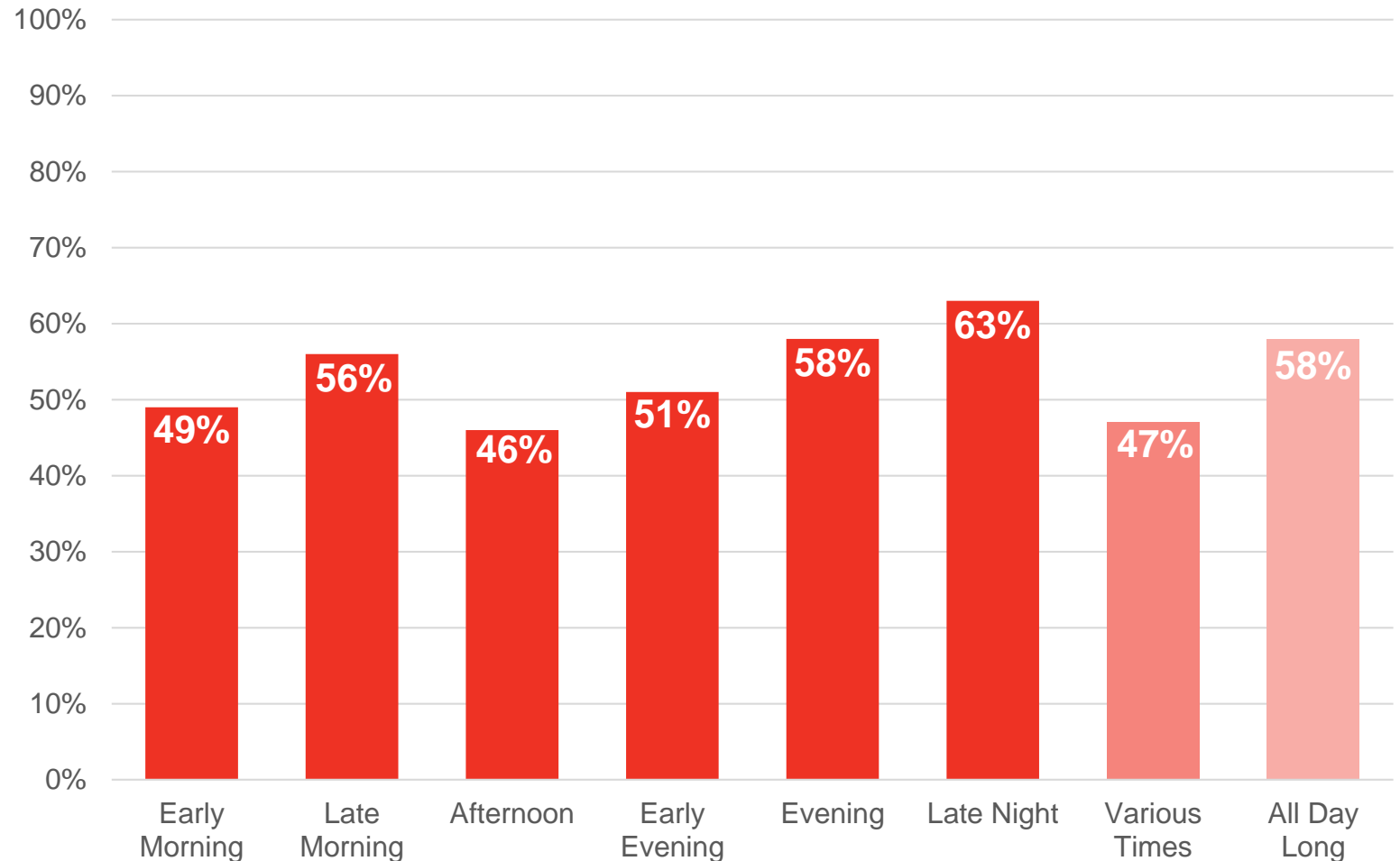
WATCH SHORT VIDEOS: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they **watch short videos** shows strength throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



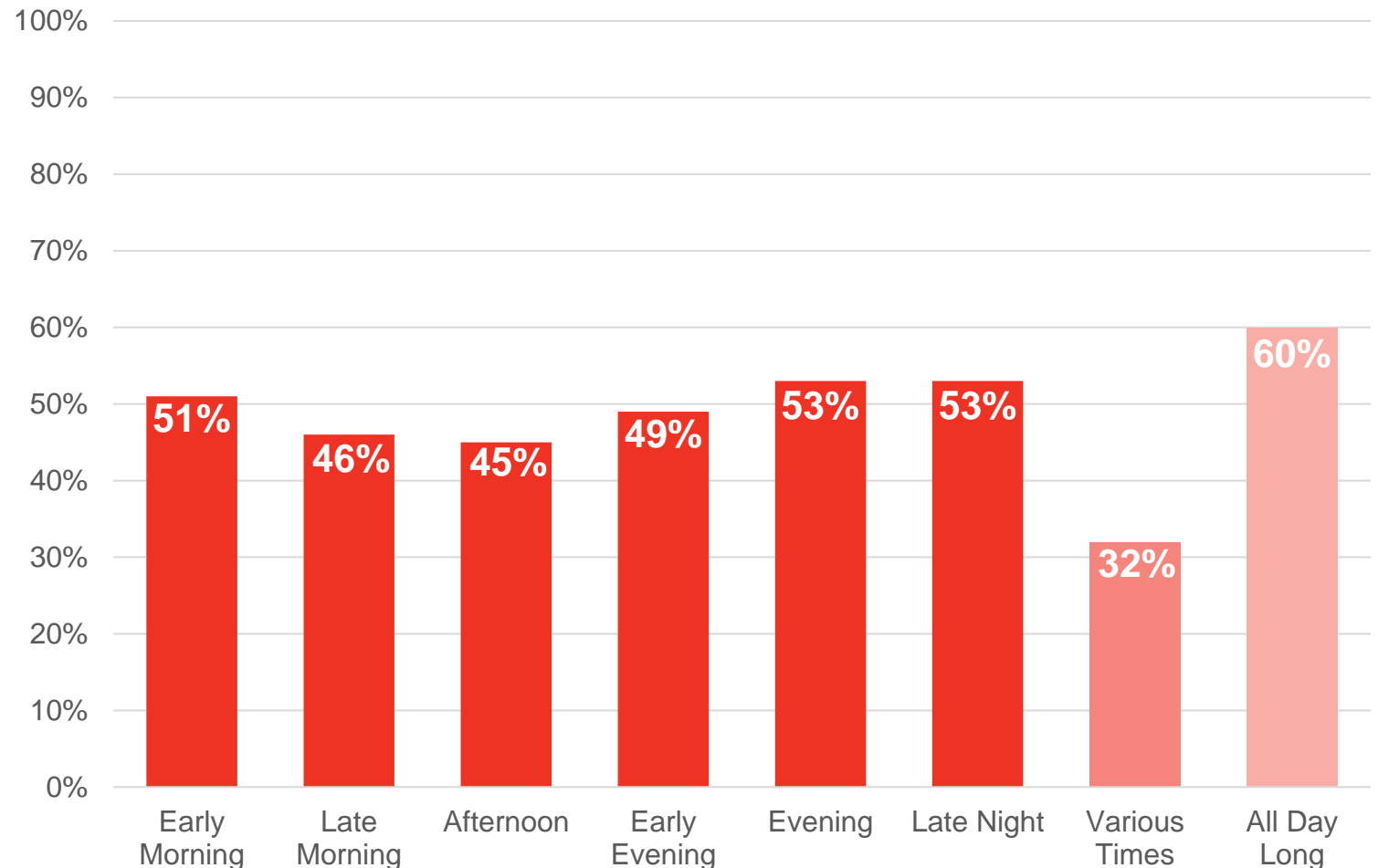
WATCH SHORT VIDEOS: Engagements create value across day

Similarly, the **level of value** consumers report feeling when they watch short videos remains **consistent** and **solid** throughout the day as well

Value Scale:

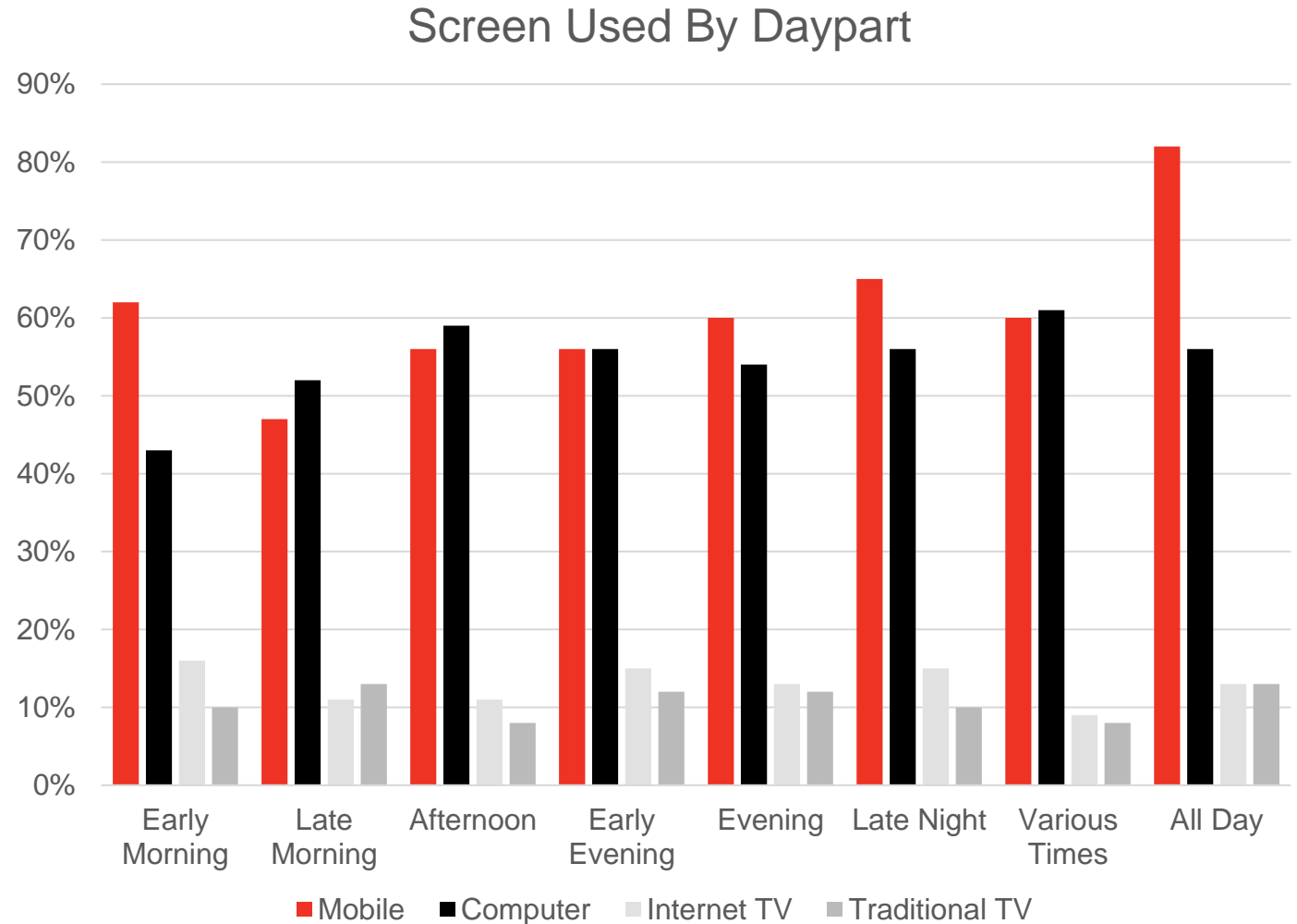
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



WATCH SHORT VIDEOS: Mobile and Computer screens share duty

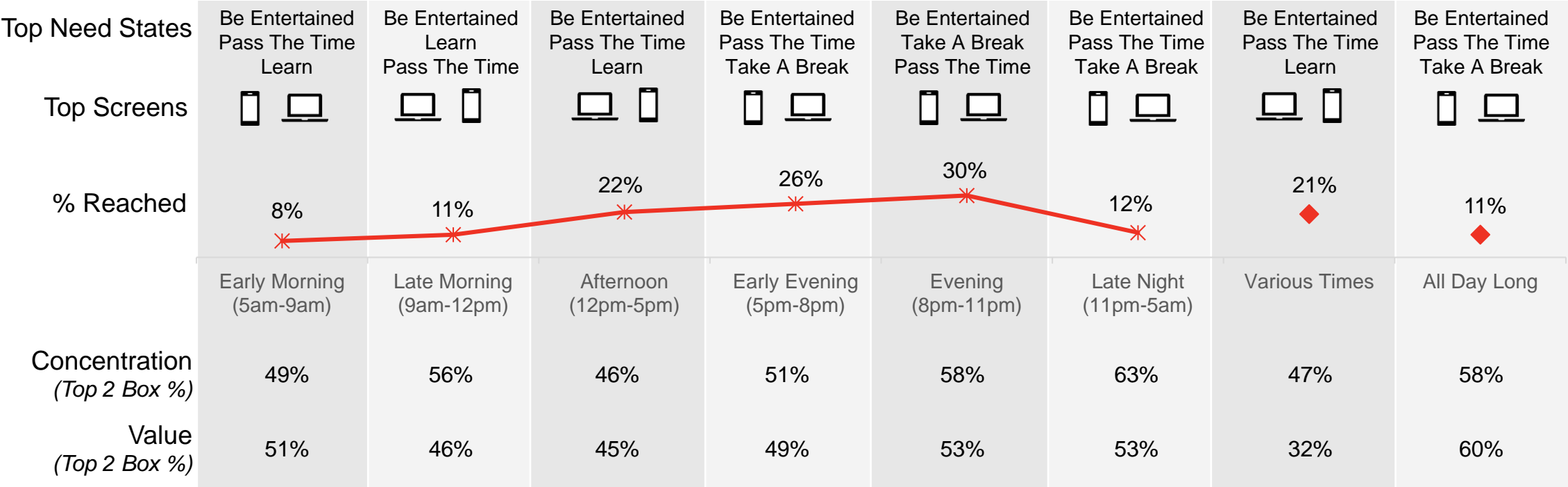
Consumers who regularly **watch short videos** tend to turn to both their **Mobile** and **Computer** screens throughout the day, but TVs are an option that is in play as well



WATCH SHORT VIDEOS: Reach fluctuates, but engagement value is consistent across the day

Watch Short Videos - Weekday

Among The 52% Of Consumers Who Regularly Watch Short Videos



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.
Q2a_WeekDayDaypart. Base: Selected activity at Q1.
Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.
Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.
IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

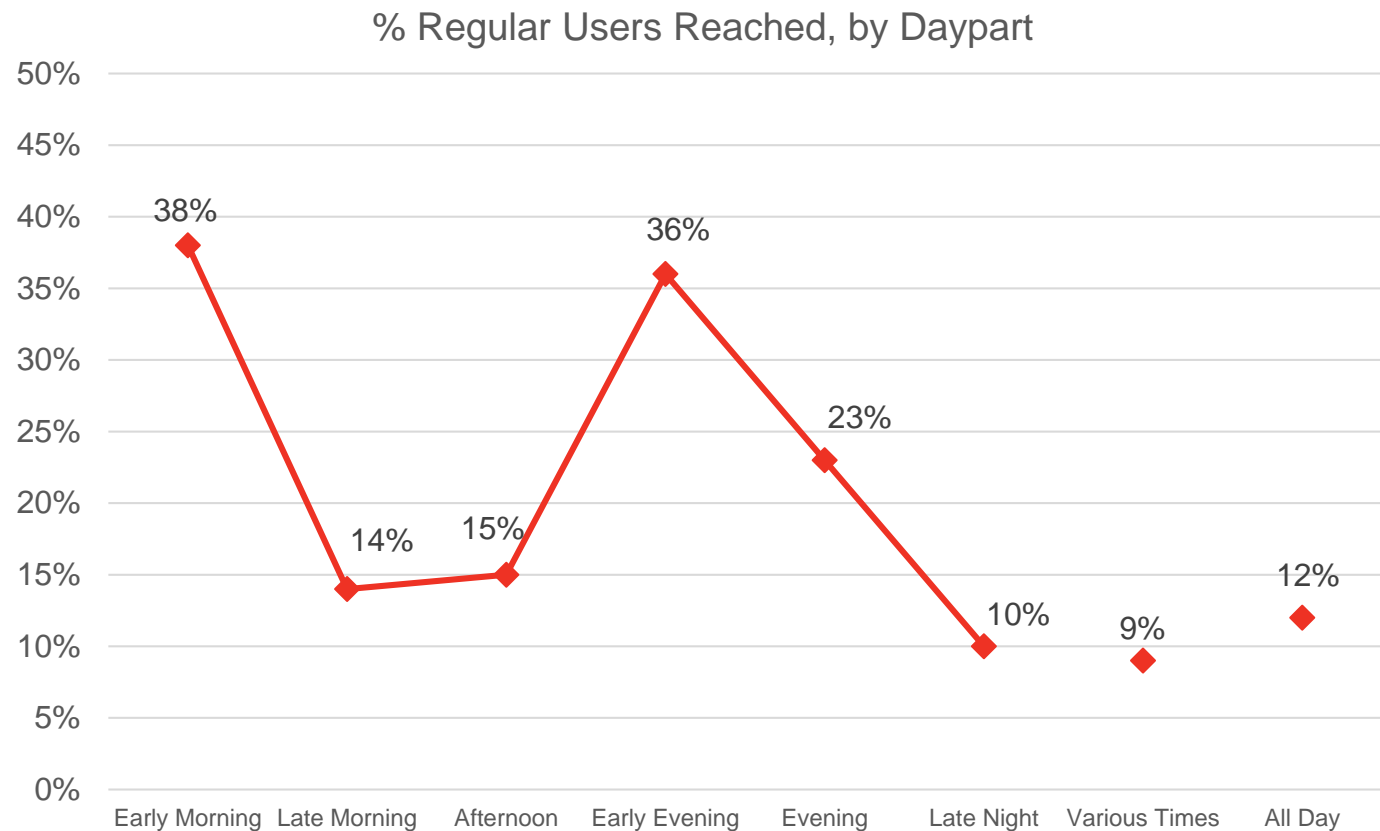
PERSONAL PRIME TIME: CHECK NEWS

CHECK NEWS: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

76%

of consumers say they
regularly check news

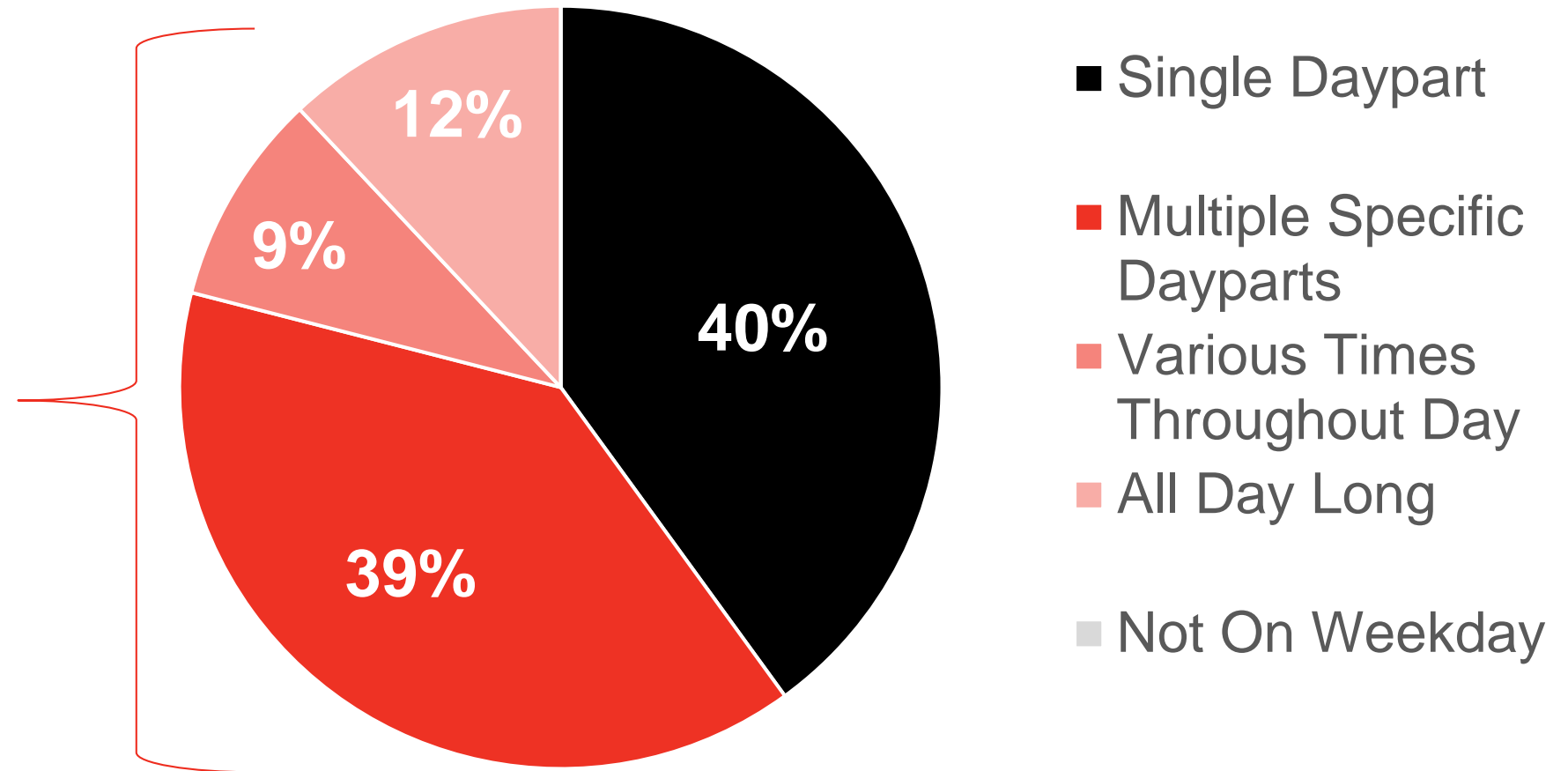


CHECK NEWS: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

60%

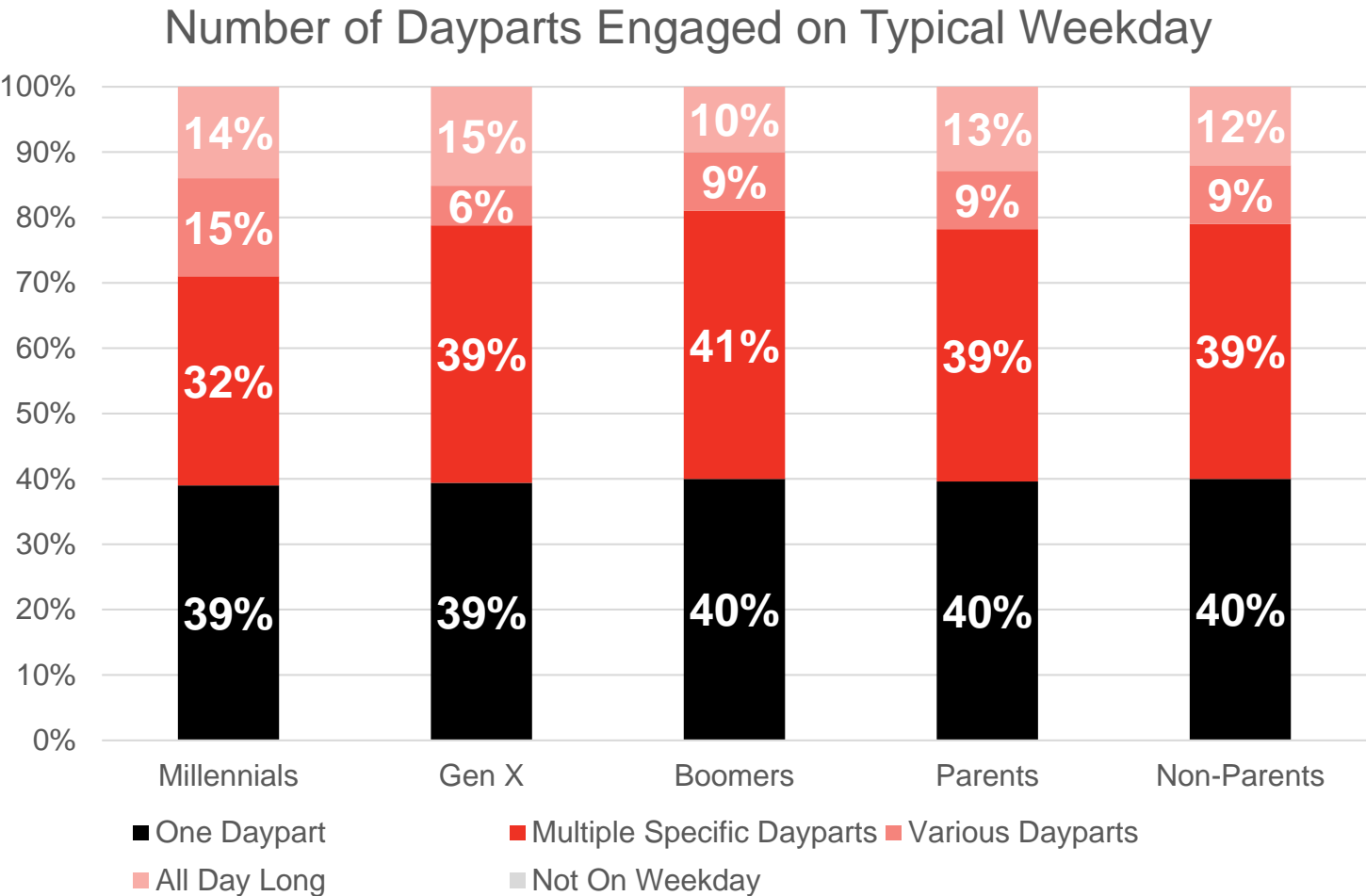
of consumers who say they regularly check news say they do so **multiple times** during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

CHECK NEWS: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



CHECK NEWS: Need States drive the 'why' for each of these engagements

While 'Get Information' and 'Learn' are consistent motivators for engaging with **news content** throughout the day, the specifics of the mix vary across dayparts

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Get Information 81%	Learn 55%	Be Entertained 9%	Pass The Time 9%
Late Morning	Get Information 74%	Learn 56%	Be Entertained 14%	Pass The Time 12%
Afternoon	Get Information 74%	Learn 54%	Pass The Time 15%	Be Entertained 15%
Early Evening	Get Information 80%	Learn 54%	Be Entertained 10%	Pass The Time 7%
Evening	Get Information 73%	Learn 54%	Be Entertained 17%	Pass The Time 13%
Late Night	Get Information 75%	Learn 55%	Be Entertained 13%	Pass The Time 10%
Various Times	Get Information 70%	Learn 60%	Be Entertained 10%	Pass The Time 7%
All Day Long	Get Information 81%	Learn 66%	Be Entertained 21%	Pass The Time 18%

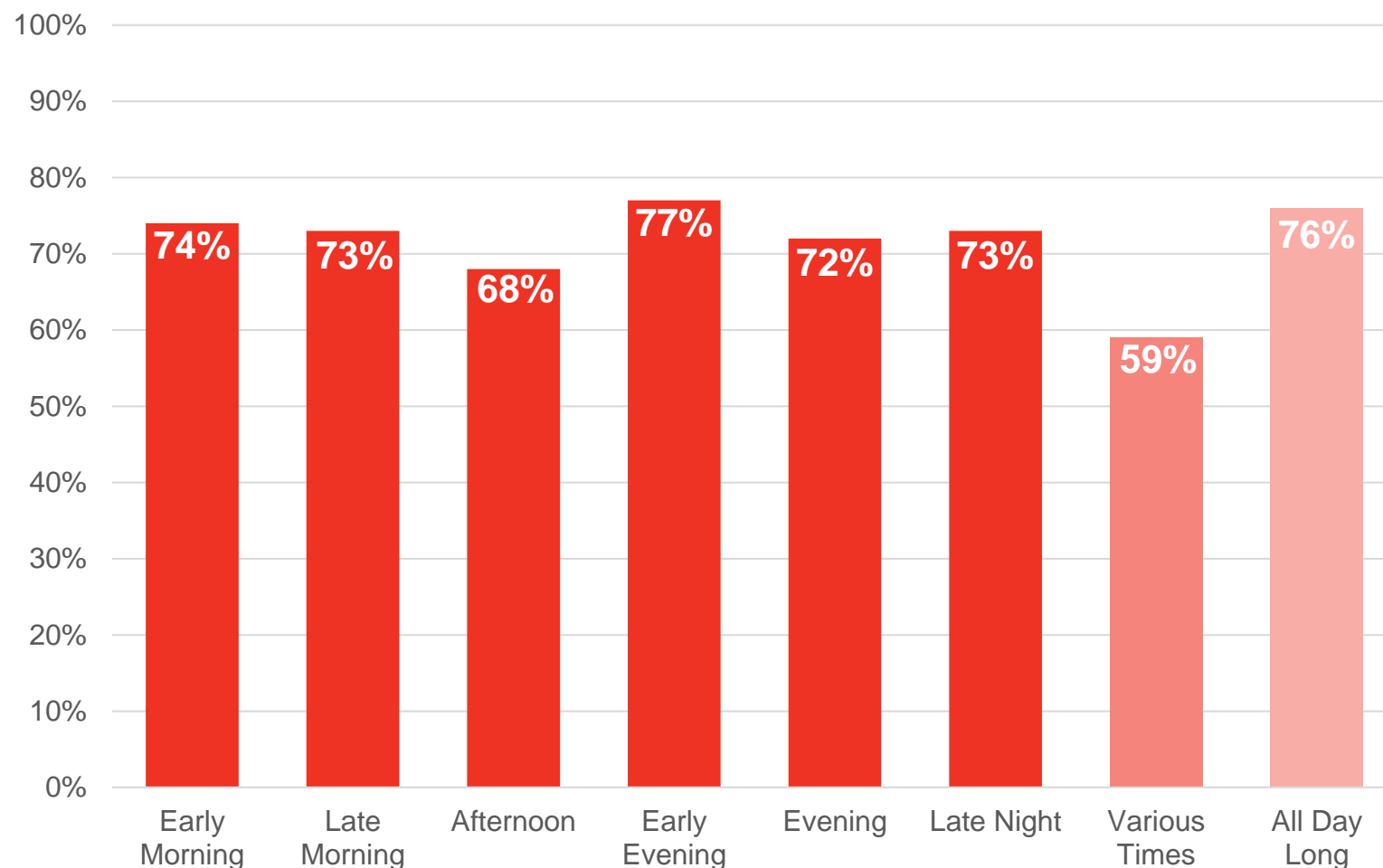
CHECK NEWS: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they **check news** remains largely **consistent** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



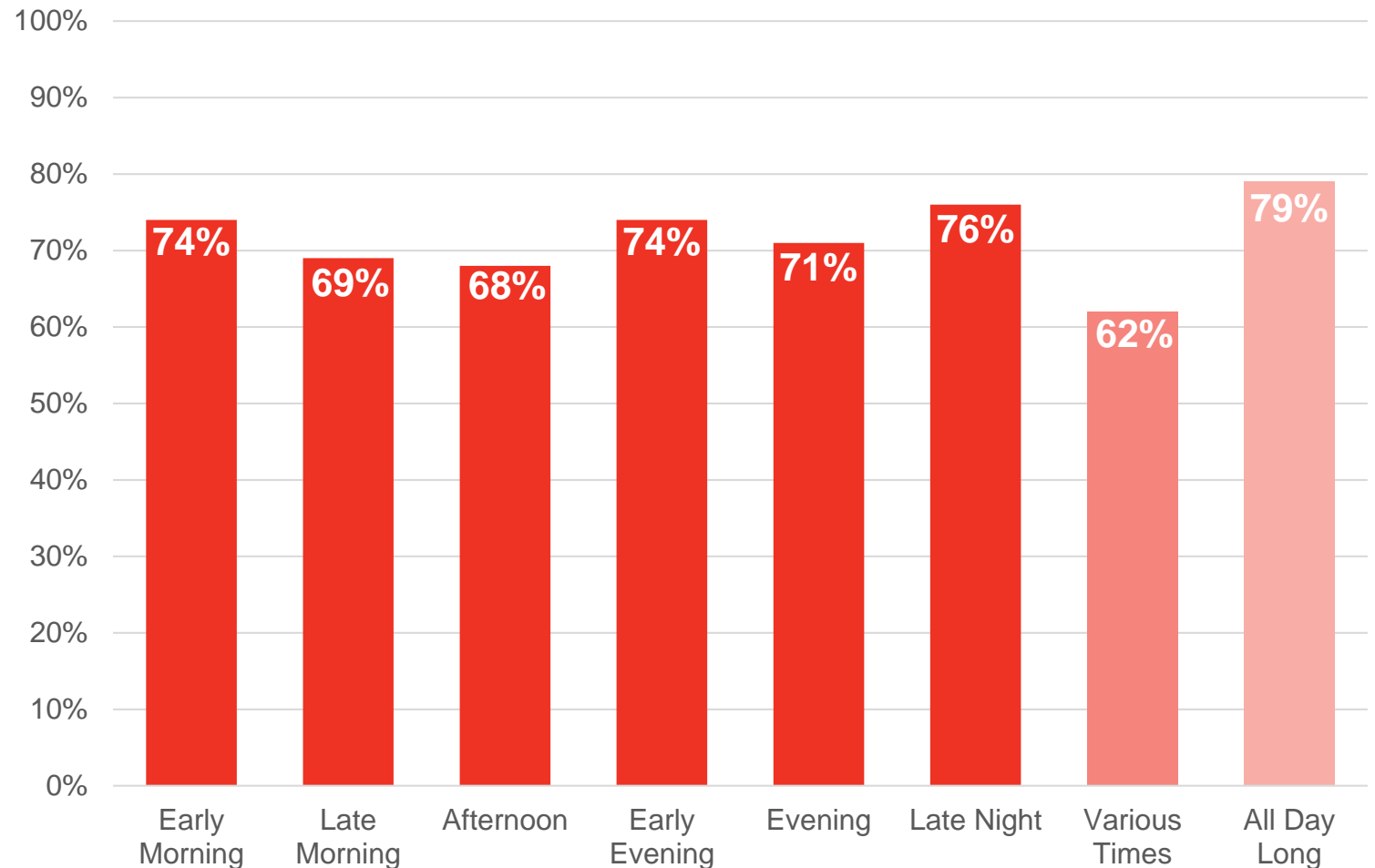
CHECK NEWS: Engagements create value across day

Similarly, the **level of value** consumers report feeling when they engage with **news content** remains largely **consistent** throughout the day

Value Scale:

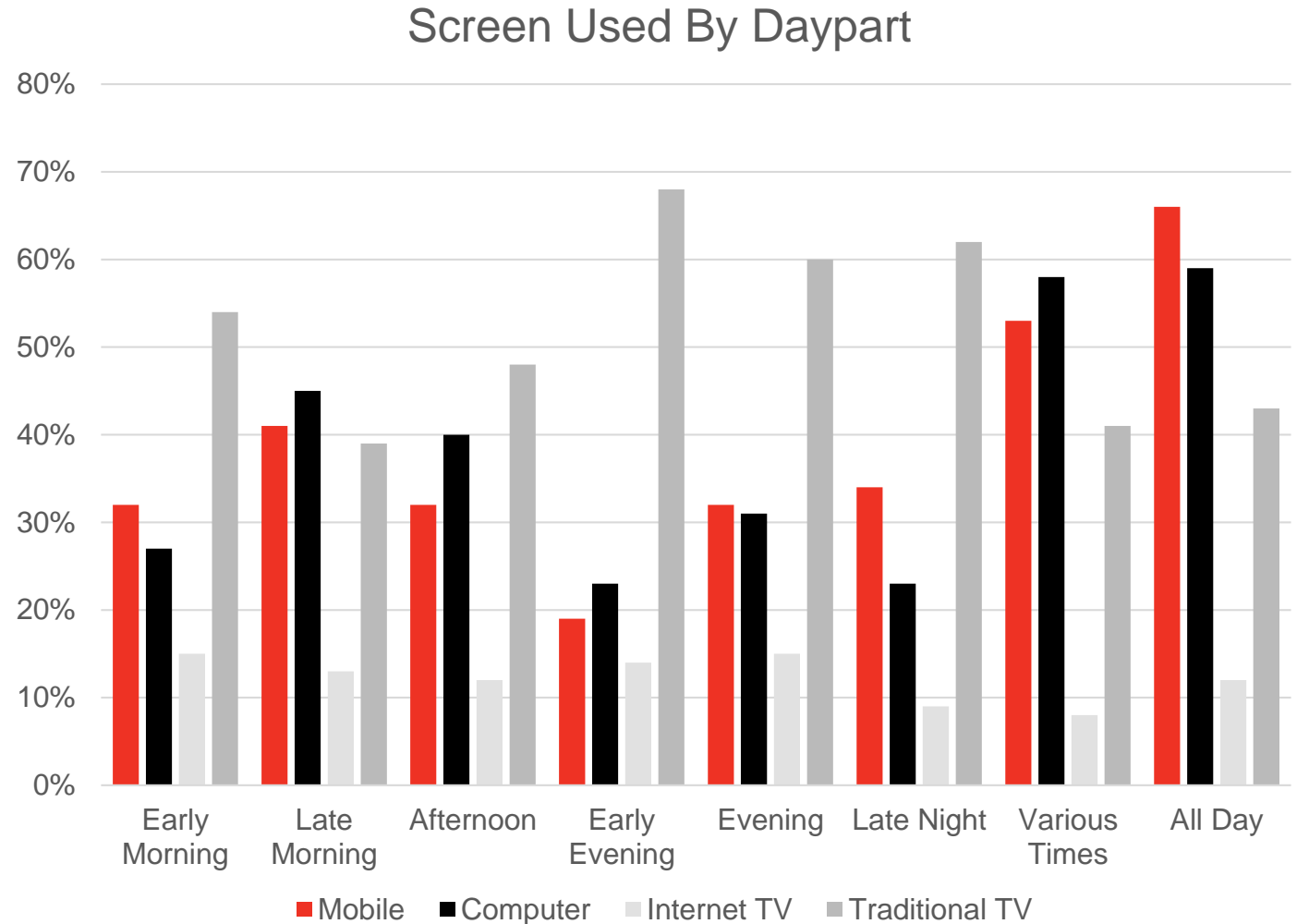
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



CHECK NEWS: TV, Computer, and Mobile trade the lead, depending on daypart and habit

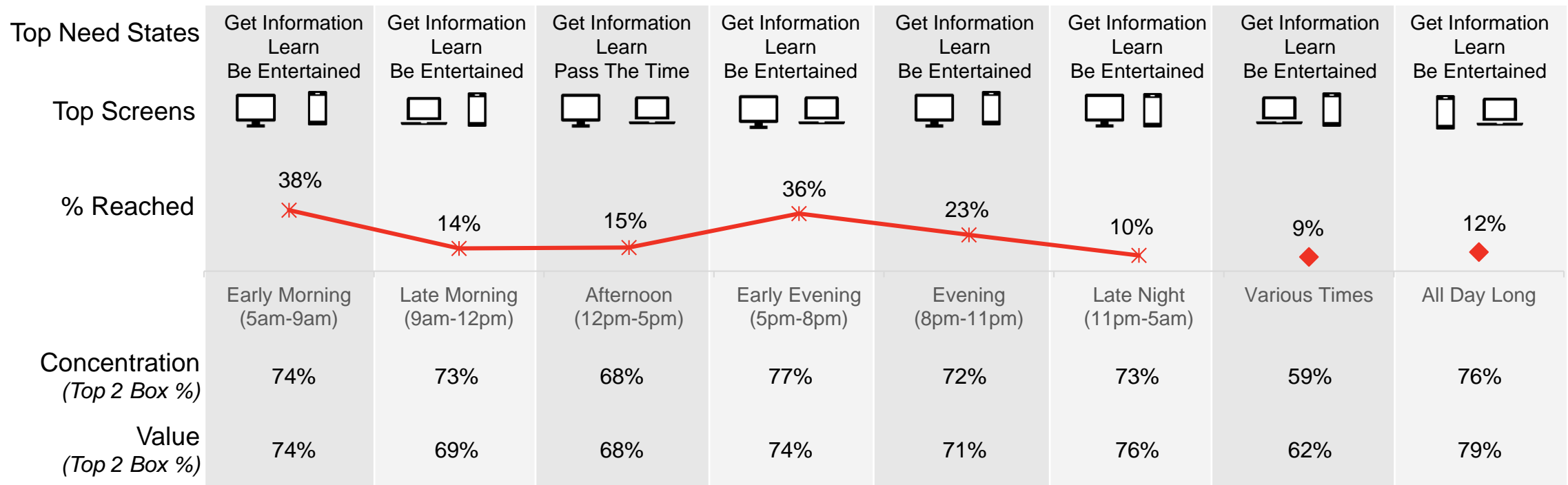
Consumers who **check news** regularly use a **mix of screens** throughout the day – **TV** at the start and end, **Mobile** and **Computers** during the late morning and afternoon hours. **Digital screens (Mobile and Computer)** play a **larger role** for consumers who say they regularly check news **all day**



CHECK NEWS: Reach fluctuates, but engagement value is consistent across the day

➤ Checking News- Weekday

Among The 76% Of Consumers Who Regularly Check News



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.

Q2a_WeekDayDaypart. Base: Selected activity at Q1.

Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.

Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.

IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

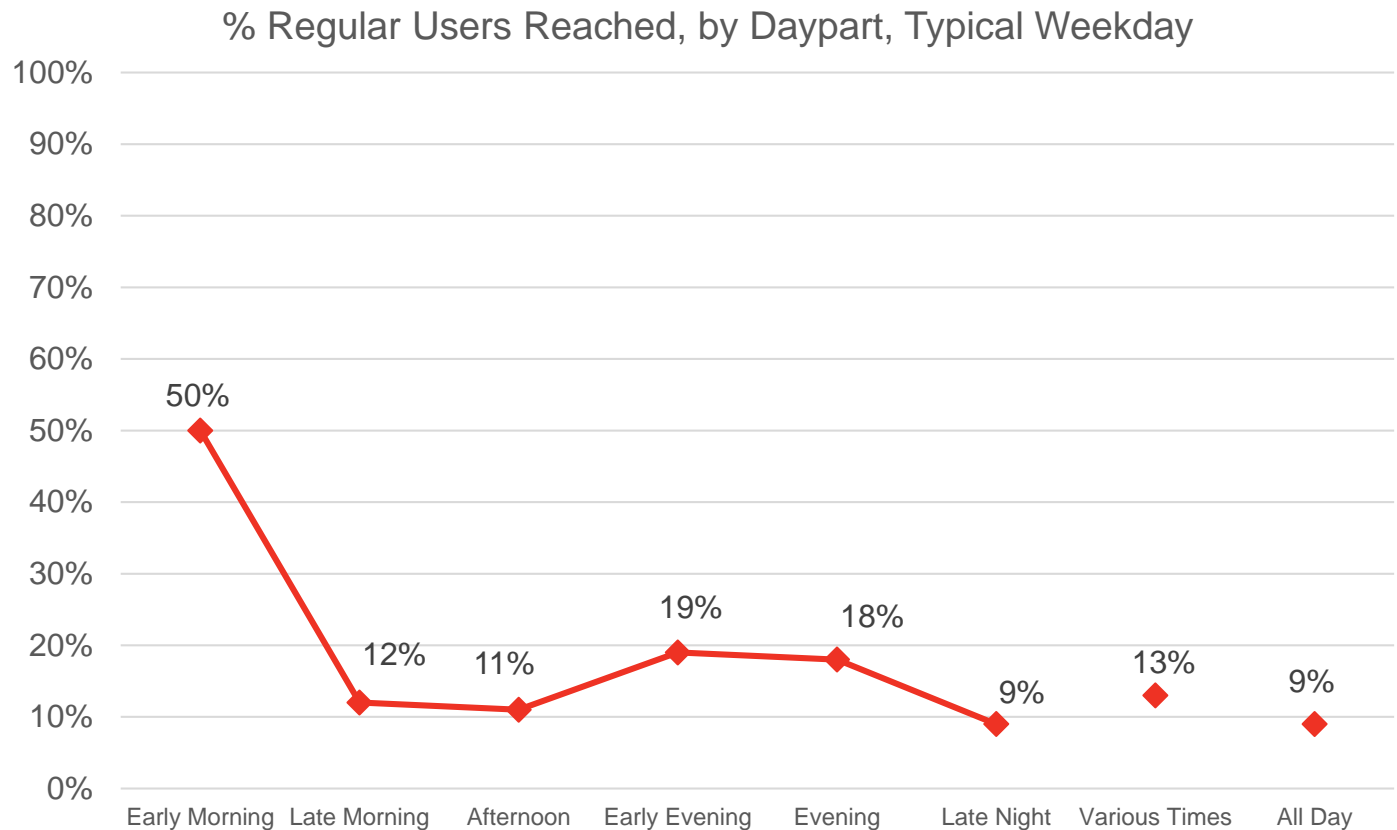
PERSONAL PRIME TIME: CHECK WEATHER

CHECK WEATHER: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

80%

of consumers say they
regularly check
weather

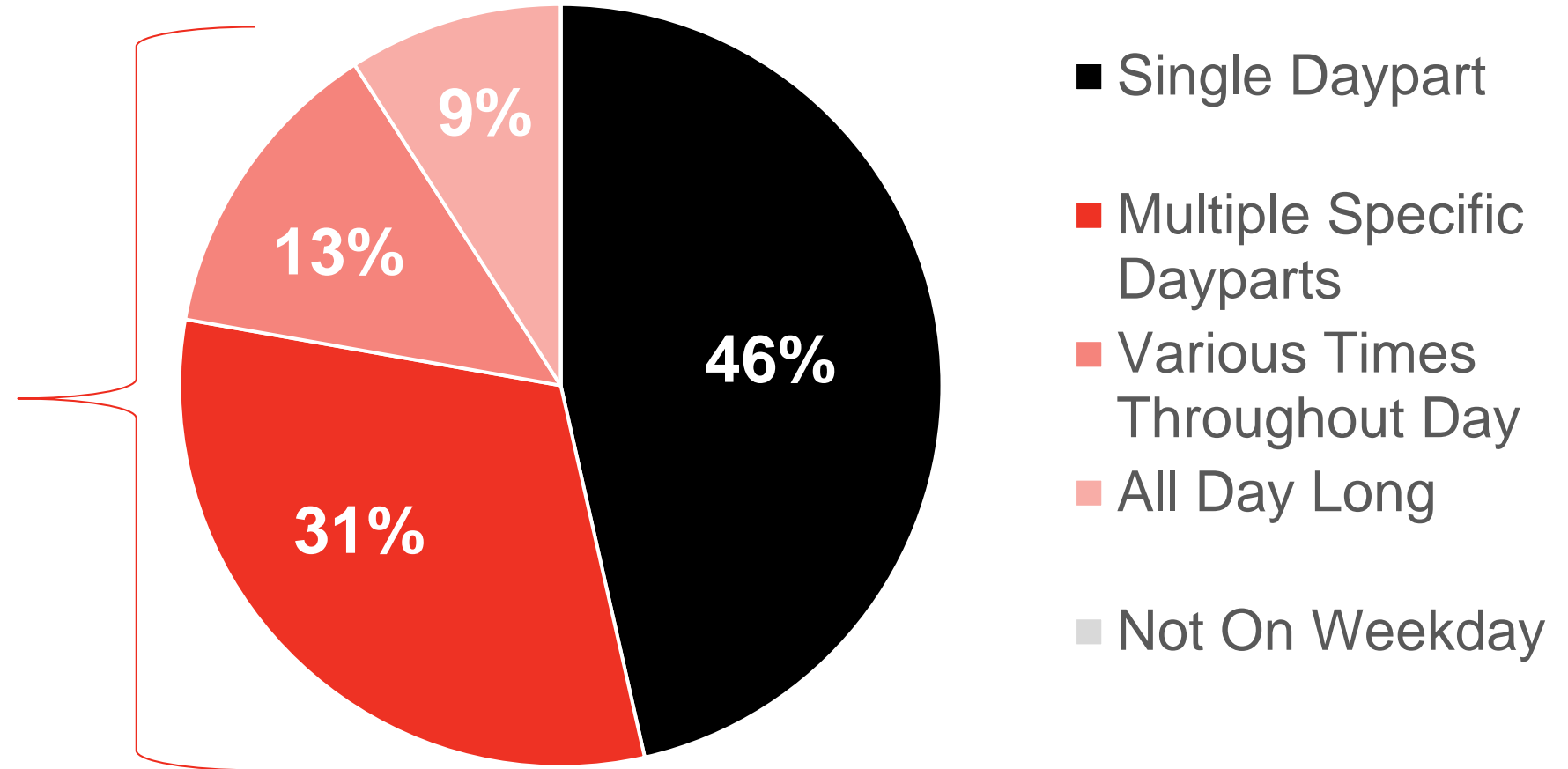


CHECK WEATHER: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

53%

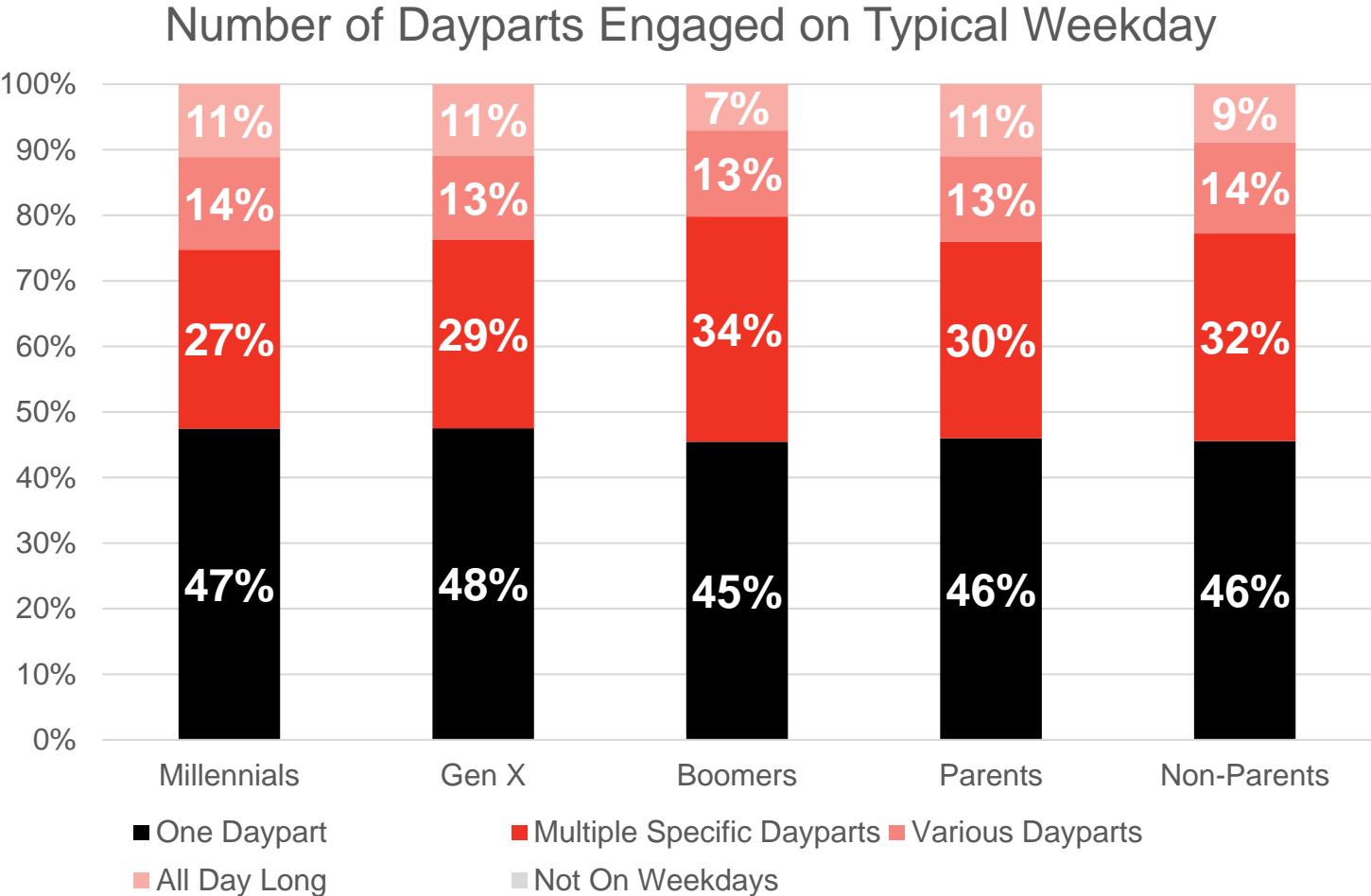
of consumers who say they regularly check weather say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

CHECK WEATHER: Multiple engagements are a common pattern

The pattern of multiple engagements per day is **consistent** across generations and parental status



CHECK WEATHER: Need States drive the ‘why’ for each of these engagements

Get Information, Learn, and Take Care of Self are consistent motivators for engaging with **weather content** throughout the day. **Get Something Done** is in the morning mix, while **Pass The Time** and **Connect With Others** appear later in the day

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Get Information 87%	Learn 30%	Take Care of Self 9%	Get Something Done 2%
Late Morning	Get Information 85%	Learn 22%	Take Care of Self 8%	Get Something Done 5%
Afternoon	Get Information 80%	Learn 30%	Take Care of Self 7%	Get Something Done 5%
Early Evening	Get Information 83%	Learn 33%	Take Care of Self 8%	Pass The Time 3%
Evening	Get Information 83%	Learn 30%	Take Care of Self 8%	Pass The Time 3%
Late Night	Get Information 86%	Learn 35%	Take Care of Self 8%	Connect with Others 3%
Various Times	Get Information 85%	Learn 21%	Take Care of Self 6%	Pass The Time 1%
All Day Long	Get Information 86%	Learn 32%	Take Care of Self 11%	Pass The Time 9%

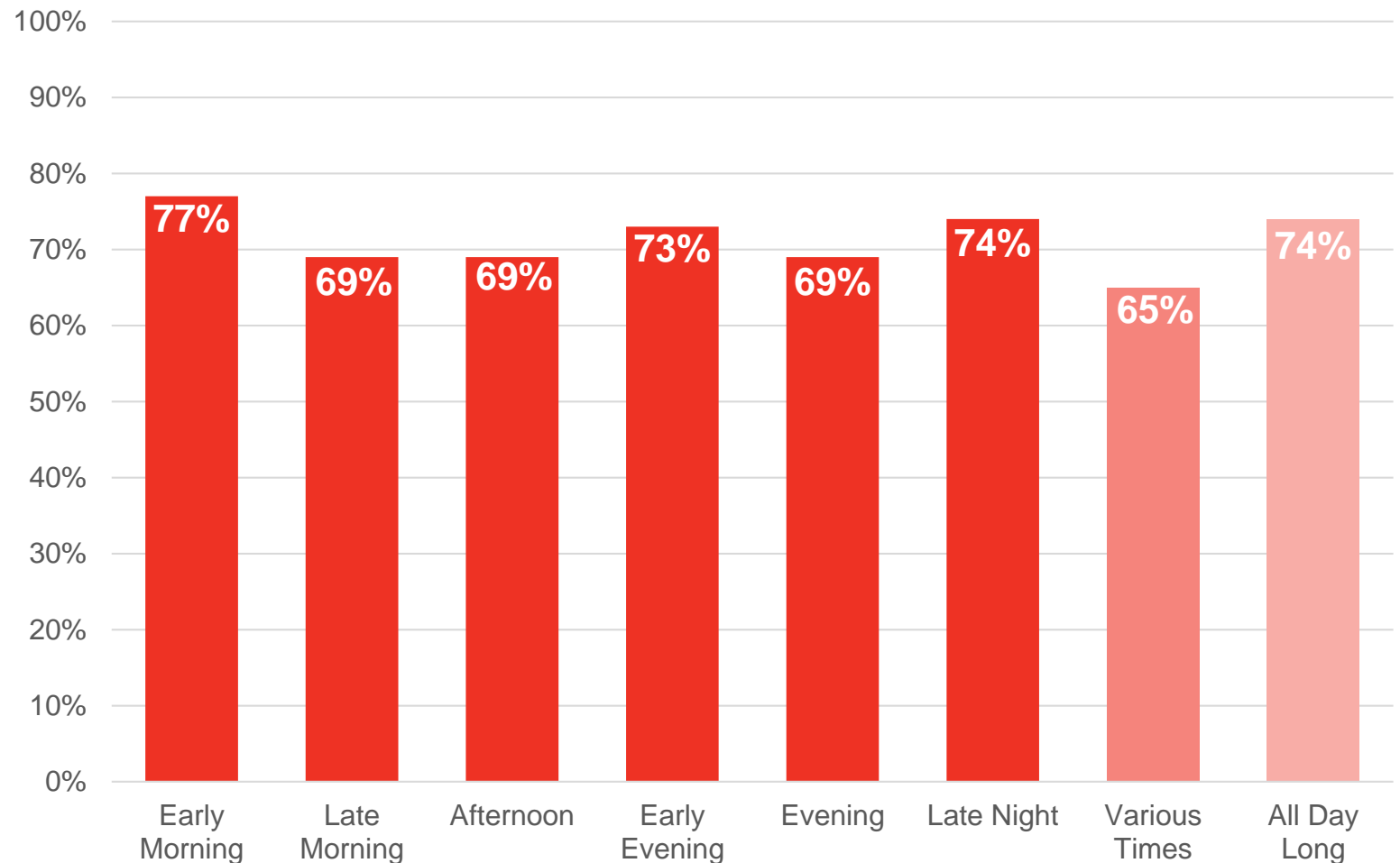
CHECK WEATHER: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they **check weather** remains largely **consistent** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



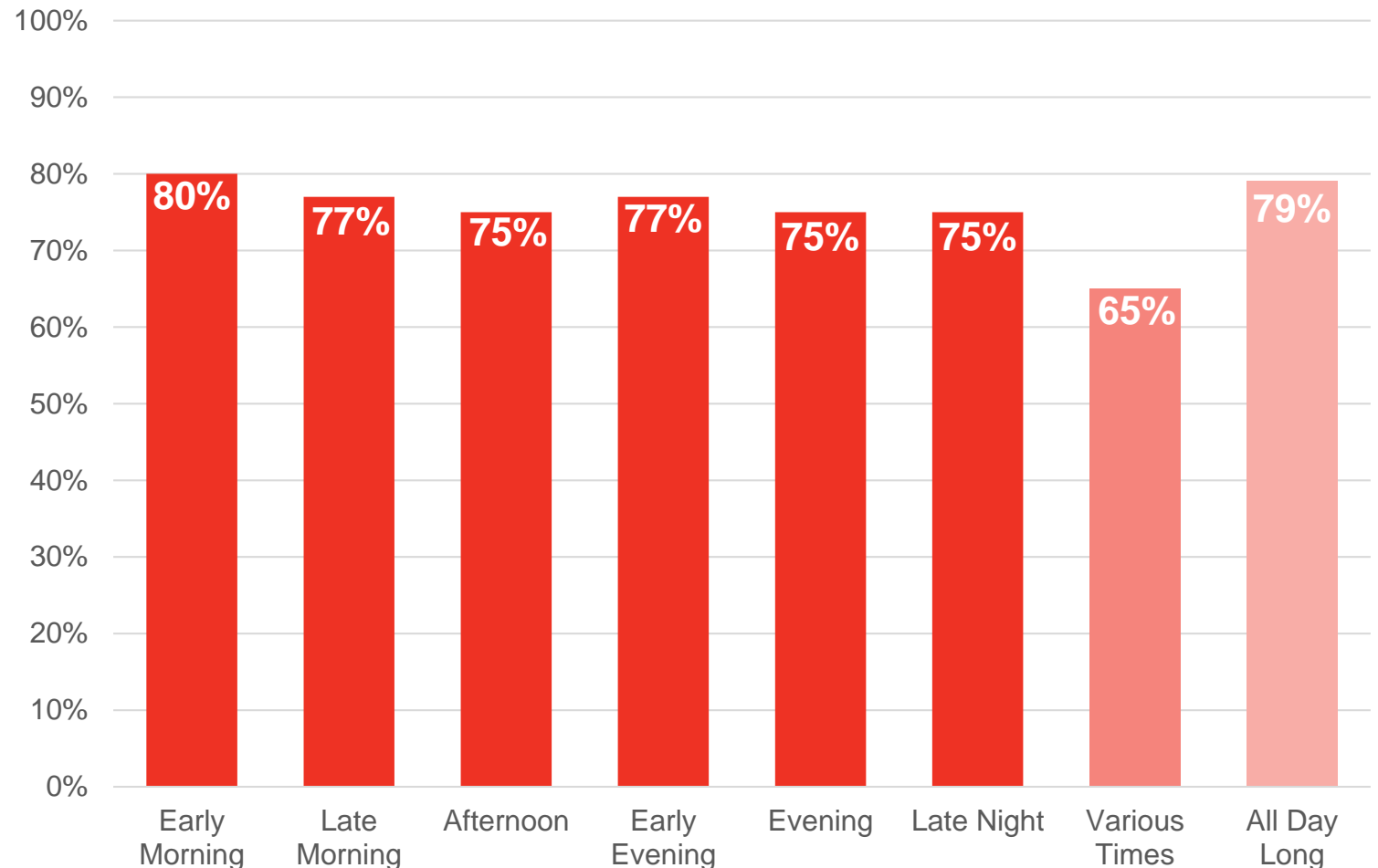
CHECK WEATHER: Engagements create value across day

Similarly, the **level of value** consumers report feeling when they **check weather** remains largely **consistent** throughout the day

Value Scale:

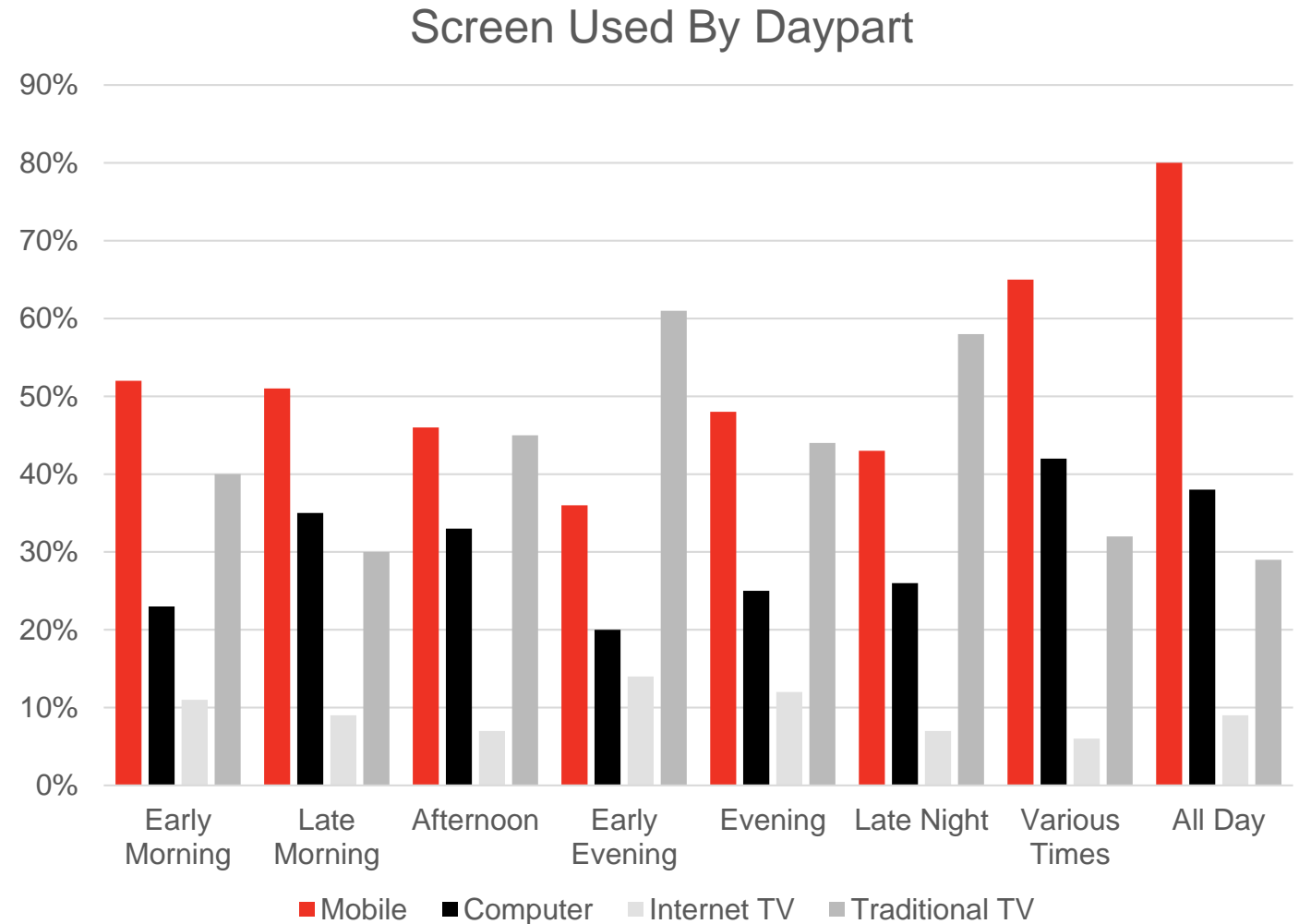
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



CHECK WEATHER: Mobile leads, but multiple screens are in play

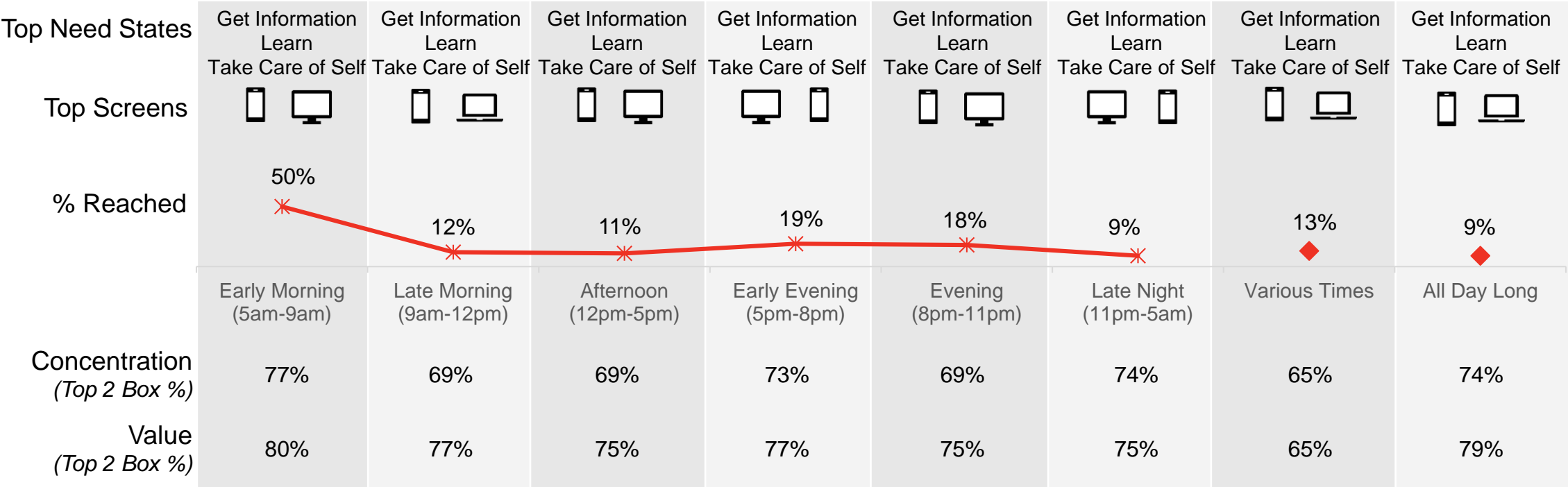
Mobile and **TV** screens are both go-to options for consumers who regularly **check weather**, but for those who do so all throughout the day, **Mobile** dominates.



CHECK WEATHER: Reach fluctuates, but engagement value is consistent across the day

Checking Weather - Weekday

Among The 80% Of Consumers Who Regularly Check Weather



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.
Q2a_WeekDayDaypart. Base: Selected activity at Q1.
Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.
Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.
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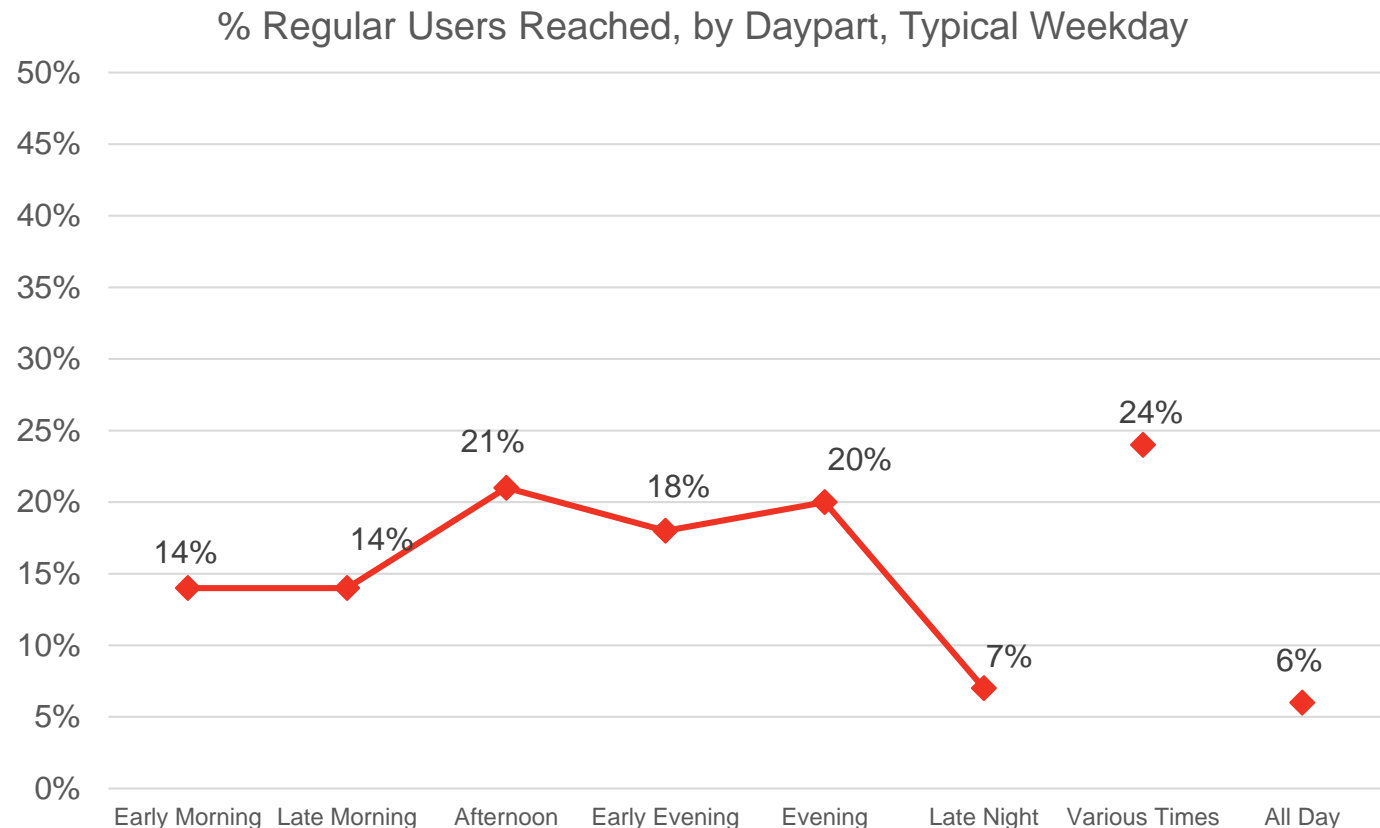
PERSONAL PRIME TIME: LISTEN TO PODCASTS

LISTEN TO PODCASTS: Reach-only view

The traditional view of Prime Time is focused on Reach – on when **the most people** are engaged.

17%

of consumers say they
regularly listen to
podcasts

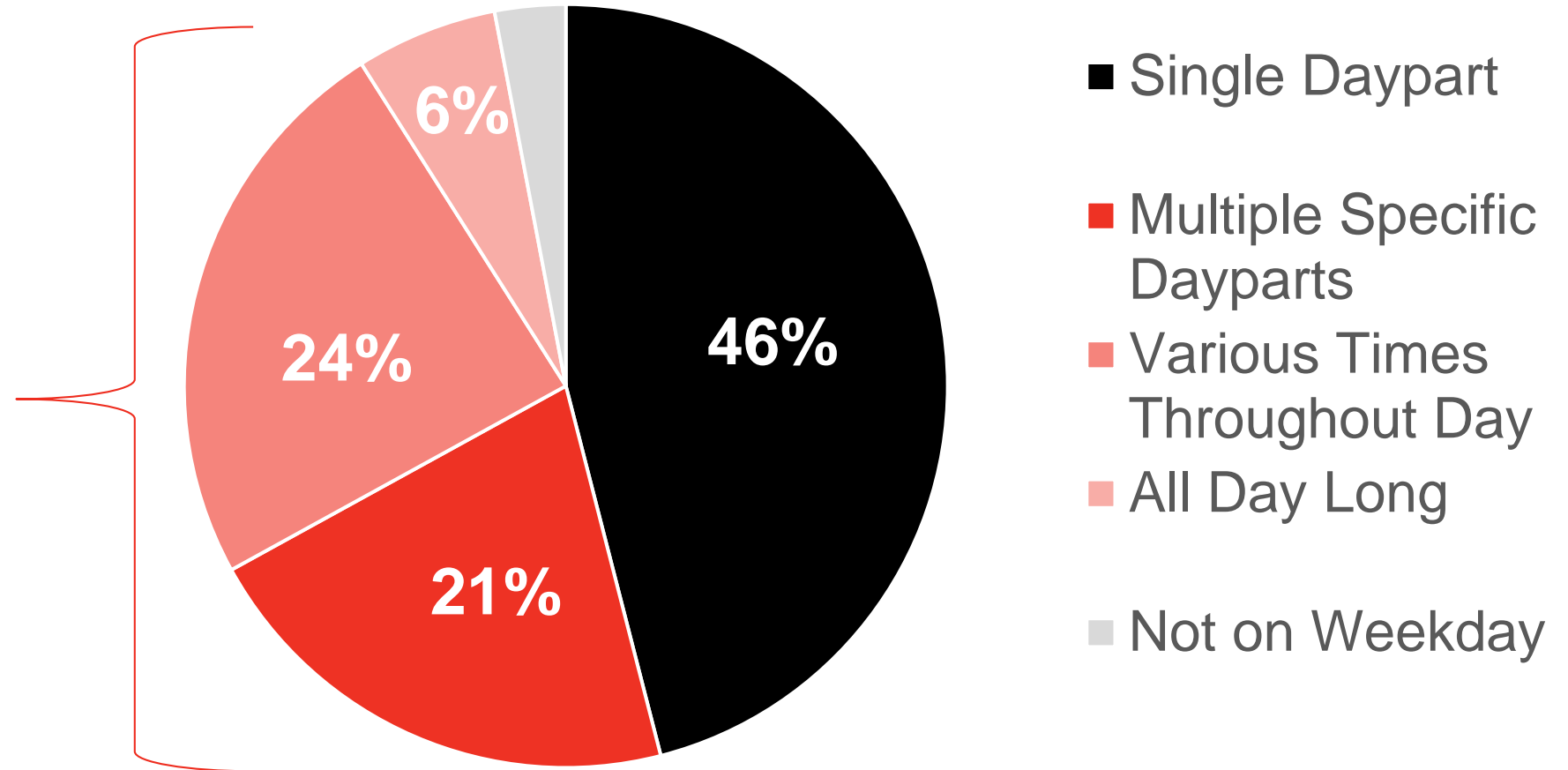


LISTEN TO PODCASTS: In reality, consumers engage throughout the day

Number of Dayparts Engaged on Typical Weekday

51%

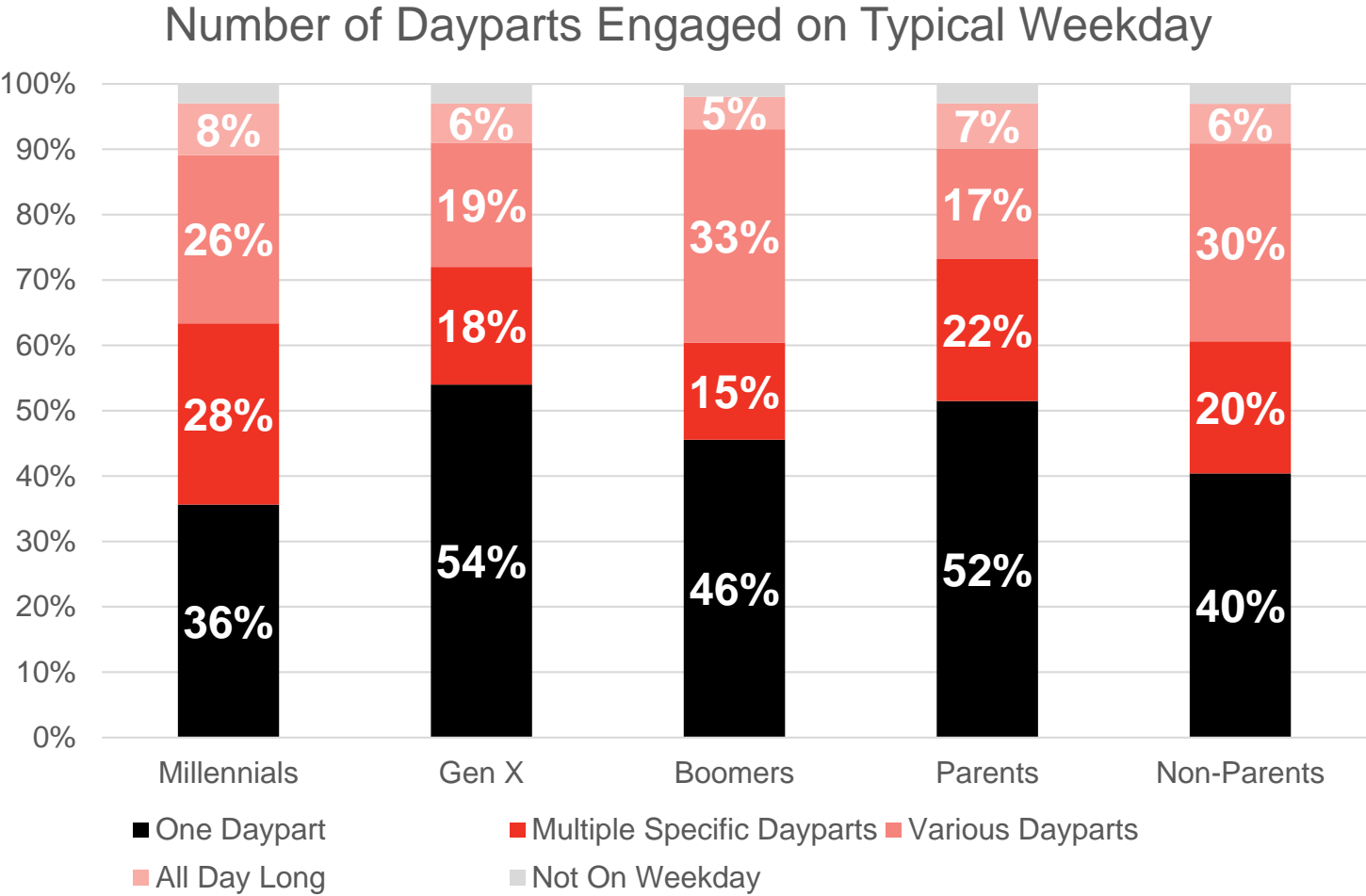
of consumers who say they regularly listen to podcasts say they do so multiple times during a typical weekday



Q2a/Q2b. Number of dayparts selected. Base: Selected activity at Q1.

LISTEN TO PODCASTS: Multiple engagements are a common pattern

The pattern of multiple engagements per day is more varied for Podcasts than other media, but significant percentages, if not outright majorities, do so across generations and parental status



LISTEN TO PODCASTS: Need States drive the ‘why’ for each of these engagements

Learn and Be Entertained trade the primary need state spot throughout the day. **Get Information** and **Pass The Time** are also in the need state mix

	Top Need State % Responding	Next 3 Need States % Responding		
Early Morning	Learn 53%	Get Information 49%	Be Entertained 47%	Pass The Time 34%
Late Morning	Learn 60%	Be Entertained 60%	Get Information 40%	Pass The Time 32%
Afternoon	Be Entertained 59%	Learn 55%	Get Information 49%	Pass The Time 32%
Early Evening	Be Entertained 63%	Learn 49%	Pass The Time 42%	Get Information 34%
Evening	Be Entertained 60%	Learn 49%	Pass The Time 32%	Get Information 26%
Late Night	Learn 58%	Be Entertained 58%	Get Information 50%	Pass The Time 25%
Various Times	Be Entertained 60%	Learn 55%	Pass The Time 35%	Get Information 33%
All Day Long	Learn 62%	Be Entertained 62%	Get Information 57%	Pass The Time 52%

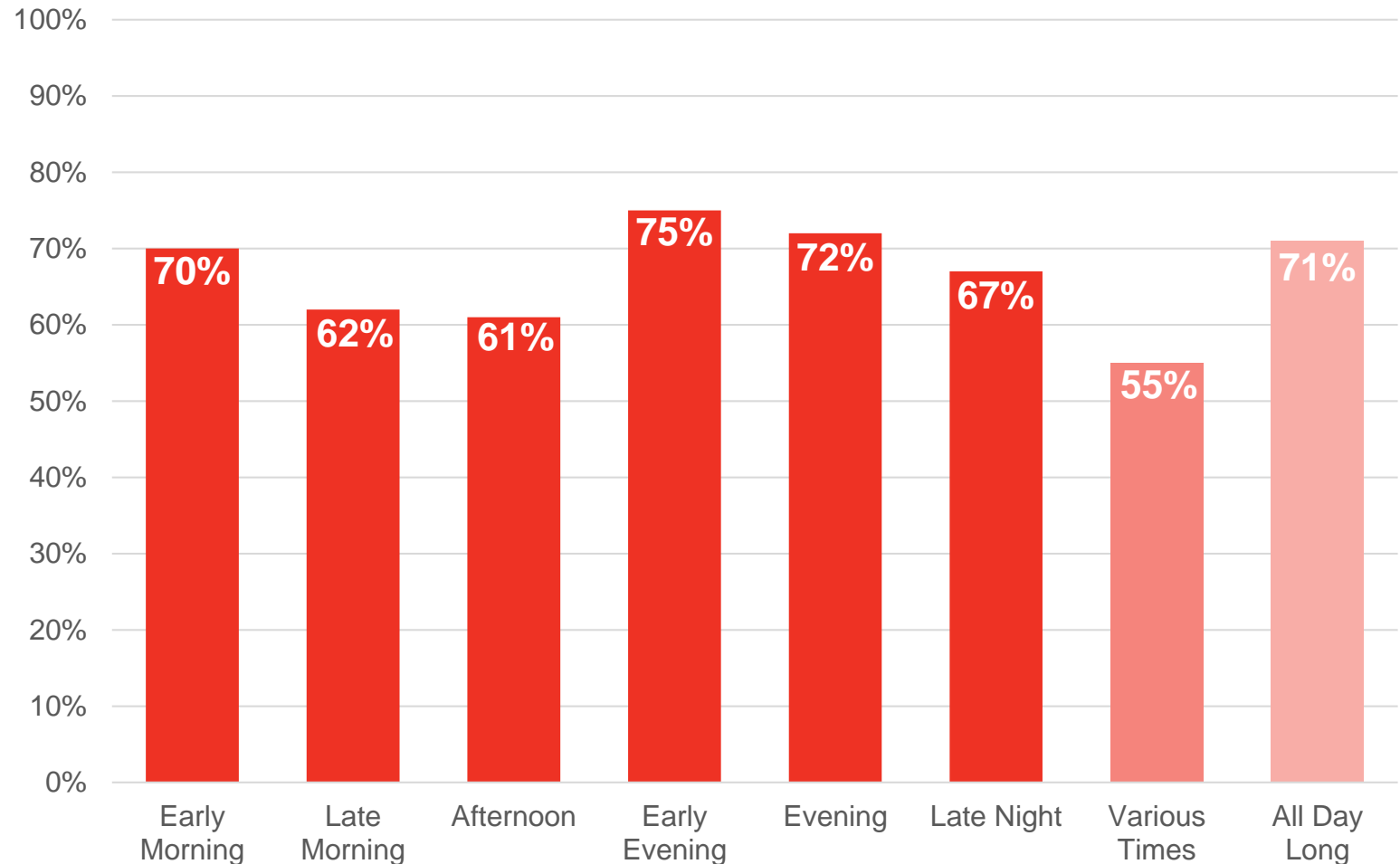
LISTEN TO PODCASTS: Consumers invest concentration in each engagement

The level of **concentration** consumers report paying when they listen to Podcasts peaks at **several points** throughout the day

Concentration Scale:
5 = Concentrating A Lot
to

1 = Not Really Concentrating On It

Concentration Levels During Engagement, Top 2 Box



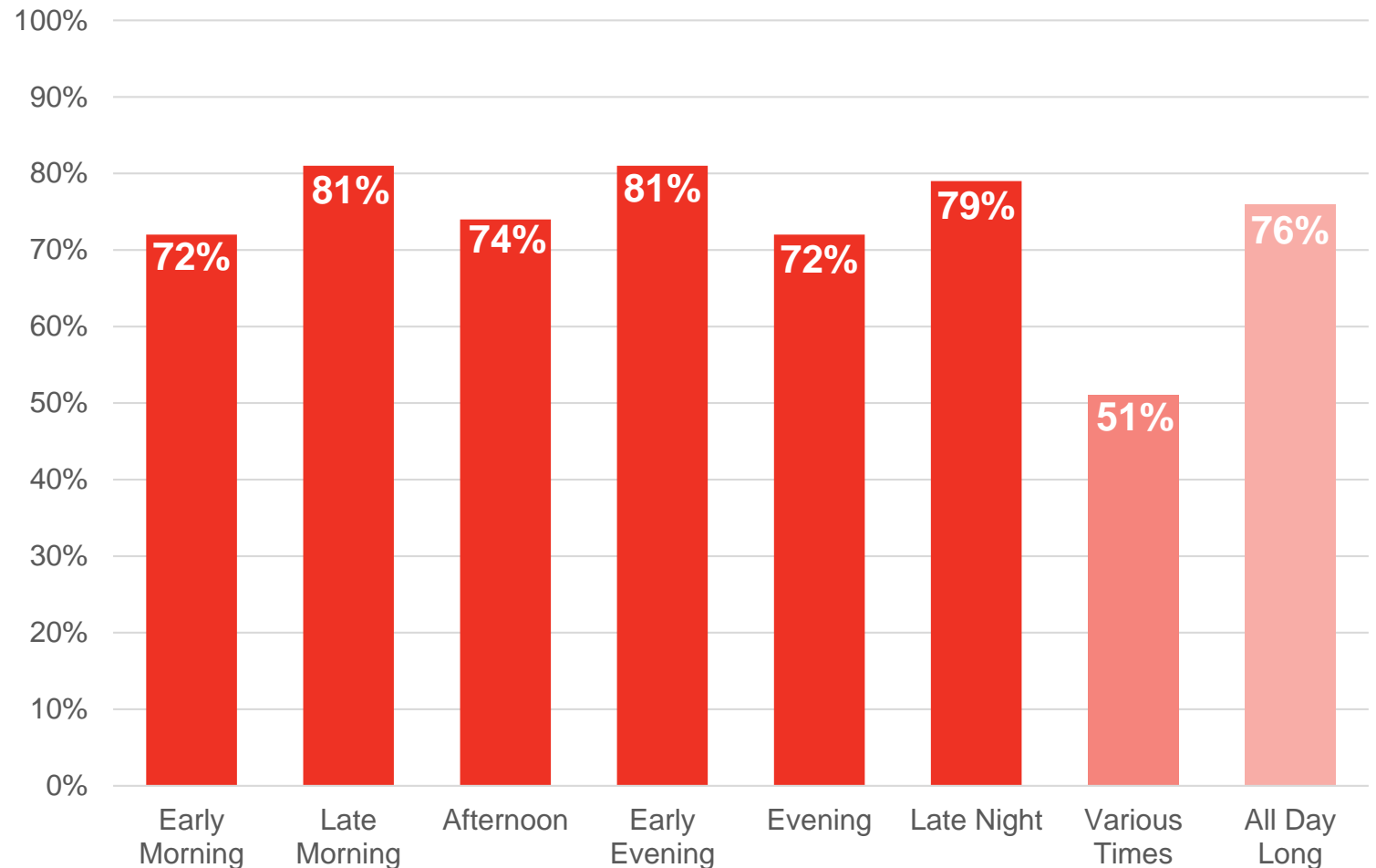
LISTEN TO PODCASTS: Engagements create value across day

The **level of value** consumers report feeling when they **listen to podcasts** is **consistently strong**, with **several peaks** throughout the day

Value Scale:

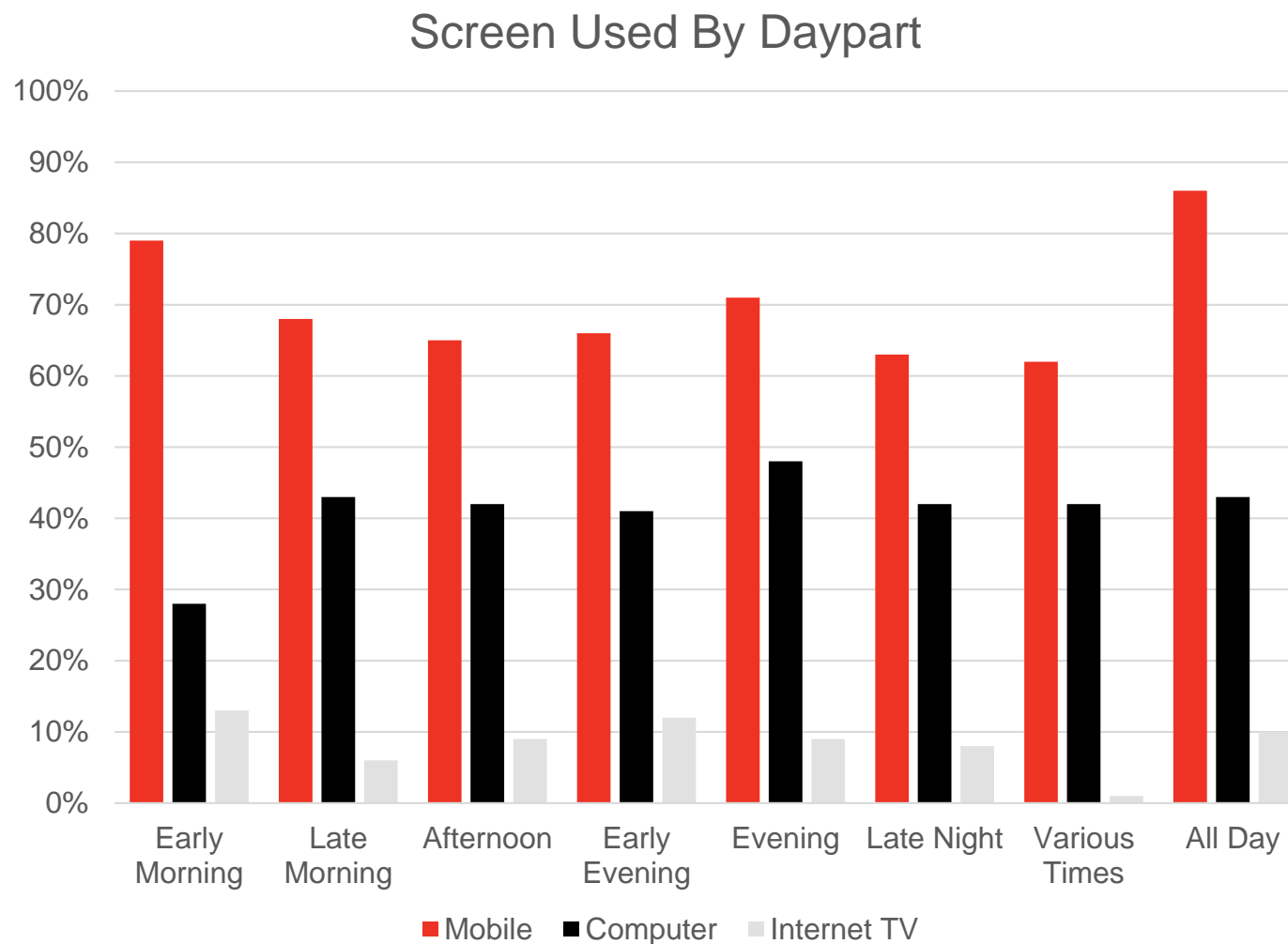
5 = Significant Value to 1 = Little Value

Level of Value Engagement Creates, Top 2 Box



LISTEN TO PODCASTS: Mobile leads, but multiple screens are in play

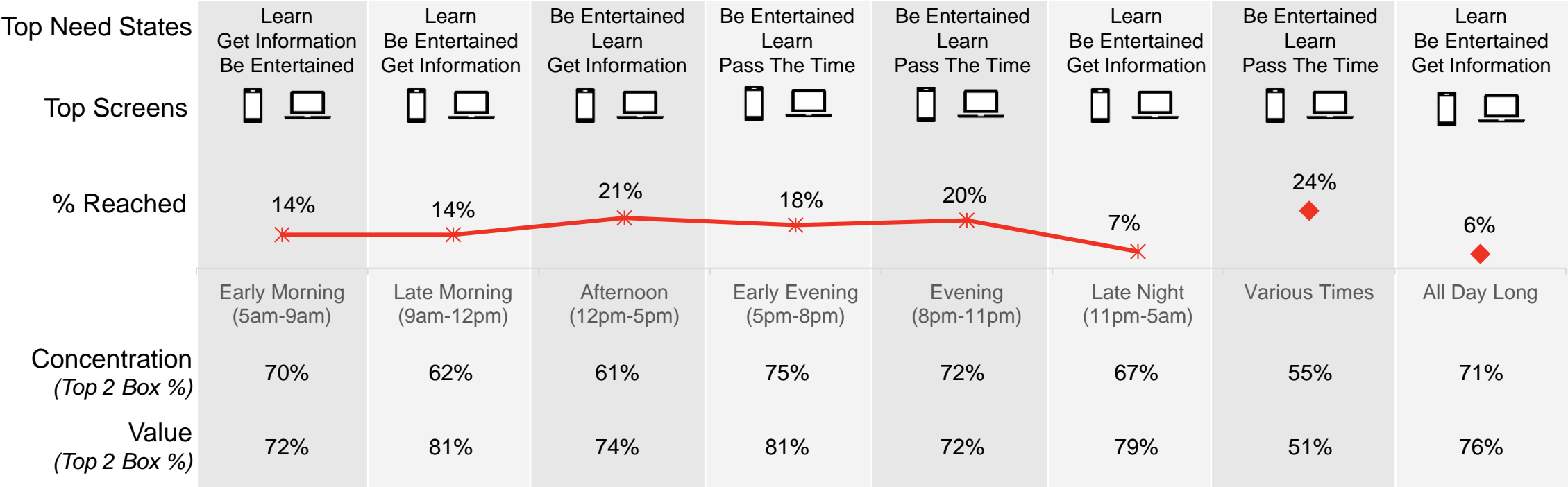
Mobile dominates podcast listening throughout the day, but **Computers** and even **Internet-Connected TVs** also play a role



LISTEN TO PODCASTS: Reach fluctuates, but engagement value is consistent across the day

Listen To Podcasts - Weekday

Among The 17% Of Consumers Who Regularly Listen To Podcasts



Q5. Why do you [INSERT ACTIVITY SELECTED AT Q1] on each type of day? Think about the time when you [INSERT ACTIVITY SELECTED AT Q1] the most. Base: Selected daypart at Q2.
Q2a_WeekDayDaypart. Base: Selected activity at Q1.
Q3. [Top 2 Box] Think about the time when you said you [ACTIVITY SELECTED AT Q1] the most. How much are you concentrating on it when you [ACTIVITY SELECTED AT Q1]? Base: Selected daypart at Q2.
Q4. [Top 2 Box] Think about the time when you said you [INSERT ACTIVITY SELECTED AT Q1] the most. How much value does this activity bring you? Base: Selected daypart at Q2.
IAB Research Using Maru/Matchbox's Springboard America Online Panel, Representative of General US Ages 18+ Online Population, January 2018

PERSONAL PRIME TIME: Implications for Brands

- **Consumers'** regular media diets cover a broad range of content, all throughout the day, multiple times a day. This creates **multiple opportunities** for connection, which can be tuned and sequenced for maximum engagement.
- **Need States** always drive consumer engagement, but they are not one-size-fits-always – across media or across time – and this is an opportunity to **tap into what moves consumers** across content and across the day, for **more relevant and valuable engagements**.
- Consumers are **investing concentration in** and **deriving value from** their media experiences **all throughout the day** – there is no down-time, and there are no 'throwaway' engagements. For brands, this means that **opportunities for connection** with consumers exist every time they engage with media. Leverage consumers' **persistent concentration** to bring **additional value** to these engagements.
- Be aware of **which screens** are in play at **what times**, and tailor content to unlock each screen's potential when it's the consumer's choice. **Mobile** devices are of particular importance across all content verticals and dayparts.

Thank You



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