



Advertising on Second Screens: Insights From Advertising Professionals

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Johdon yhteenveto

Useiden medioiden samanaikainen käyttö, yleisöjen pirstaloituminen, vuorovaikutteisuuden hyödyntäminen mainonnassa sekä tarve entistä paremmille mainonnan kohdennus- ja mittausmenetelmille ovat kaikki trendejä, jotka vaikuttavat markkinointikäytäntöihin. Televisiomainonnassa yksi tapa vastata näihin tarpeisiin on kehittää mainontaa ”second screenissä” eli hyödyntämällä kasvussa olevaa television katselun aikana tapahtuvaa toisten näyttöjen (esimerkiksi tablet-tietokoneiden tai älypuhelinien) käyttöä. Tämänkaltaiset mainoskonseptit hakevat kuitenkin vasta muotoaan ja kehitystyössä keskeistä onkin huomioida myös mainostajien näkemykset siitä, millaisia etuja mainostaminen kakkosnäytöillä voi heille tarjota.

Tässä tutkimuksessa analysoidaan suomalaisten mainosalan ammattilaisten näkemyksiä toista näyttöä hyödyntävän mainonnan mahdollisuuksista. Tavoitteena on luoda pohjaa toista näyttöä hyödyntävien mainontakonseptien kehittämiseksi:

- ymmärtämällä mainostajien tärkeimpiä TV- ja Internet-mainontaan liittyviä kipupisteitä
- ideoimalla ja suunnittelemalla yhdessä ominaisuuksia, joita kehittämällä mainonnasta toisessa näytössä tulisi houkuttelevaa

Tutkimus toteutettiin maaliskuussa 2012 järjestämällä kahdeksan laadullista tutkimushaastattelua suomalaisille mainonnan ammattilaisille. Haastattelut koostuivat kolmesta osiosta: mainonnan nykytrendejä ja haasteita luodanneesta avoimesta keskusteluosuudesta, yhteissuunnitteluosuudesta sekä erilaisten ominaisuuksien tärkeyteen pureutuneesta yhteenvetokeskustelusta.

Yhteenvetona raportissa esitetään haastatteluiden perusteella tunnistetut viisi keskeisintä mainostajan kipupistettä. Kaikista merkittävimäksi kipupisteeksi nousi kasvava tarve helposti mitata mainonnan tehokkuutta ja vaikutuksia yhä tarkemmin ja mahdollisimman reaaliaikaisesti. Toisen näytön sovelluksen avulla olisi mahdollista tarjota monipuolisempaa taustatietoa mainoksiin reagoineista katsojista. Toinen merkittävä kipupiste liittyi niin ikään katsojien reaktioiden mittaamiseen: toista näyttöä hyödyntävä sovellus voisi tarjota joustavan ja edullisen keinon tehdä muutoksia markkinointiviestinnän sisältöön jopa kesken mainoskampanjan. Toisen näytön sovelluksen ominaisuudet voisivat myös auttaa katsojien aktivoimisessa, kustannustehokkaassa mainonnan entistä tarkemmassa kohdentamisessa ja erottumisessa mainosvirrasta sekä lisätietojen välittämisessä katsojille.

Keskittymällä kehittämään näihin mainostajien keskeisimpiin kipupisteisiin vastaavia mainosratkaisuja, voidaan helpottaa mainostajien kynnystä ottaa uudet konseptit osaksi markkinointiviestintäänsä ja edistää kestävien bisnesmallien rakentamista konseptien ympärille.

Executive Summary

Media multitasking, audience fragmentation, advertising utilizing active user interaction and the need for better targeting and measuring of advertising are all current trends influencing daily marketing practice. In the context of TV advertising, these trends can be answered for example by utilizing growing second screen usage (i.e. using tablet computer or smart phone) while watching television. However, the most effective and useful second screen solutions are only gradually taking shape and advertisers' ability to see the benefits and integrate second screen solutions in to their marketing communications cannot be ignored in planning.

In this report, we explore Finnish advertising professionals' insights in second screen advertising. The goal is to find focus for developing second screen advertising solutions by:

- understanding advertisers' most important pain points related to current advertising in TV and online
- discovering and co-designing features for future use of 2nd screens in advertising

Eight qualitative interviews with advertising professionals in Finland were carried out in March-April 2012. The interviews consisted of three sections: discussion about the current trends and future challenges in advertising, 2nd screen concept co-creation, and summarizing discussion about relative importance of different second screen features.

This report summarizes advertising professionals' insights into possibilities of second screen with illustrative quotations. As a result, five most significant advertiser pain points in current TV advertising are recognized and possible implications to developing second screen advertising solutions described.

According to the analysis the most significant pain point is the ever growing need to measure TV advertising effectiveness in real-time with a precise and easy way. Second screen can provide richer background information about those users who have reacted to ads. The second pain point is also related to measuring user reactions: second screen could provide more flexible and cheaper way to make changes to content during the campaign. Second screen could also offer different kinds of solutions to activating the advertising audience, and targeting advertising in order to be cost-effective and stand out from advertising stream. Utilizing a second screen could also answer to the requirement to communicate more information to consumers with growing expertise and awareness.

We suggest that focusing on answering to these challenges in developing second screen solutions would benefit advertisers and make it easier to gather the needed revenue streams and business ecosystem around future second screen concepts.

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3 List of Acronyms and Abbreviations

IPTV	Internet protocol television
GRP	Gross rating point
ROI	Return of investment
SMS	Short messaging service
MMS	Multimedia messaging service
NFC	Near field communication

4 Introduction

The share of TV-advertising has been quite stable in recent years: 8 percent from advertising expenditure including planning and production costs and 20 percent from media advertising in 2011 (Finnish Advertising Council 2012) and TV advertising is still proved to be effective in the era of digital marketing (see for example Rubinson 2009). On the other hand, consumers' ability to skip advertising with digital devices, more fragmented audiences and high production costs are examples of challenges for TV advertising (Viljakainen et al. 2008).

Advertisers have started to look for answers to these challenges by combining the benefits of TV and mobile advertising. At the latest, the hype around second screen in Superbowl 2012 raised second screen advertising under public discussion. When talking about second screen in this report, we refer to other supplemental media-related devices people use during television watching. Usually this additional electronic device is for example a tablet or a smart phone.

The development of advertising in second screen is backed up by some other advertising megatrends: media multitasking by users, new advertising forms utilizing active user participation and interaction, and growing need for better targeting and measuring of advertising. The increasing usage of tablet devices has evolved in accordance with this discussion: for example in the beginning of 2011 almost 30 percent of time spent with tablet was while watching TV (Nielsen 2011). Recent results also suggest that media multitasking could give synergy benefits to advertising: for example Chang and Thorston (2004) showed that simultaneous exposure to TV ad and Web site is more effective than repetition of traditional TV ad. However, the most effective and useful second screen solutions in the Finnish context are still gradually taking shape.

The trend of using multiple media platforms simultaneously is in accordance with the ideas of integrated marketing communications theory: marketers should have separate but complementary goals and strategies for each media and campaign. Hence, advertisers' ability to see the benefits and integrate second screen solutions in to their marketing communications cannot be ignored in planning.

In this report, we explore some Finnish advertising professionals' insights in second screen advertising. **The goal is to find focus for developing second screen advertising solutions by:**

- **understanding advertisers' most important pain points related to current advertising in TV and online**
- **discovering and co-designing features for future use of 2nd screens in advertising**

The study was conducted as a thematic study. Eight qualitative interviews were carried out in March-April 2012. Interviews consisted of three sections and lasted around an hour. They started with an open discussion about the current

advertising trends and challenges, which interviewees encounter in their daily work, especially related to TV, online and mobile advertising. The purpose of the next section was to co-create future second screen concepts. Some possible features of future second screen concepts with pictures were presented to interviewees in order to inspire discussion. These features were a result of concept creation workshops carried out in research project with University of Tampere, TeliaSonera, VTT and Osumus. Examples included for example possibilities to create targeted advertising for 2nd screen to support the television advertising, features to persuade users to participate in interactive activities, possibility to save advertising material seen on TV for observing it on any suitable time later on, and possibilities for advertisers to gain real-time feedback on users reactions to advertising. However, these features were presented as possibilities with different implementation choices, and purpose was not to test any single ready-made concept. Instead, considerations about benefits, drawbacks and ideas for further development were encouraged. In the end, interviews ended with summarizing discussion about the relative importance of different second screen features brought up earlier in the interview. A short questionnaire rating the importance of different features was utilized as a starting point for discussion.

Interviews were recorded and transcribed. The analysis of interviews was based on reading the open, freely formulated answers of respondents. The pain points that emerged from the data were written down with practical examples and illustrating quotations. They were then combined with the discovered future features of second screen advertising. Through these categorizations, suggestions for focus in future development of second screen advertising concepts were recognized.

Table 1: Eight interviewees

	Number	Description	Interviewee
4 TV advertisers	1	Fast moving consumer goods (food)	Marketing Manager
	2	Fast moving consumer goods (food)	Marketing Manager
	3	Durables (cars)	Marketing Manager
	4	Services and entertainment	Marketing Director
2 media agencies	5	Established player, full service range	Account Director
	6	Smaller player, digital image	Account Director
2 advertising agencies	7	Digital background	Creative Director
	8	More traditional background	Digital Planner

Because purpose of the interviews was to gain a broad insight and diverse opinions, the most important criteria for choosing interviewees was to find experts with different backgrounds. Consequently, eight interviewees were chosen to represent different kinds of industries and agencies (Table 1). We chose four big brand advertisers that are used to advertise on TV and covered different kind of businesses from daily consumer goods (food) to durables (cars) and services (entertainment). Four media- and advertiser agencies were chosen to represent both established players and slightly smaller players with strong digital image. All interviewees were decision makers in marketing and/or handling advertiser accounts daily. We would like to thank Katariina Uljas-Ahl from Dagmar, Tiina Mörttinen from Särkänniemi, Jaana Ehrnrooth from Volkswagen and five other anonymous marketing experts for their valuable insights into current advertising practices and future ideas.

This report is part of Smart and Targeted Ads -project, which aims to study and develop new advertising concepts and services which integrate TV, online media and social networks by using 2nd screen applications. The project is carried out in cooperation with VTT, TeliaSonera, Nelonen Media, Osumus and Geniem, and is part of Next Media research program.

5 Insights into targeting 2nd screen ads based on user profiles

One recurring theme in the interviews was the possibilities that second screen could offer for targeting advertising. Traditionally, TV-ads are targeted based on the data about the audience of TV programs complemented with some regional targeting. Second screen could offer more versatile or more precise basis for targeting: based on for example preferences, social media data or behavior in online pages or applications. This leads to the possibility to customize advertising material on second screen for different target groups for example during commercial breaks or during sponsored TV-shows. From the user point-of-view, this could decrease the amount of irrelevant advertisements.

5.1 Perceived benefits from standing out more cost-effectively

Targeting in TV advertising was not considered especially difficult as such: advertisers are so used to the traditional way of targeting advertising based on TV programs and their audience profiles that it is often perceived to be enough. Instead, even though receiving user data and measuring the user actions are somewhat easier tasks online than in regular TV, targeting in online world is perceived more difficult. The Internet provides such a wide number of different kinds of venues that it becomes difficult to know where exactly are those people that are needed to reach. As the number of different social media platforms rises the more fragmented the environment and customer pool becomes and getting in touch with the audience is seen even more difficult.

”Before, the increase of new TV channels was perceived challenging. Nowadays the situation is that there are those specific two or three big channels that stand out if you want to reach big masses. It’s easier to

categorize that this program interests 40 year old women, the choice is not that difficult to make. The challenge has nowadays relocated into social media. You have to figure out if you should create a banner or go to Habbo-hotel and create a room or what to do. It's so new and diverse field."

Current ways of targeting were not seen as challenging, however new ways of targeting were seen important in the means of gaining better results by standing out from advertising stream and increasing cost-effectiveness. The traditional key challenges of marketing communication are still valid with current trends and new digital channels: getting in contact with target groups, standing out from the advertising stream and finding the right messages and creative solutions. Nowadays there are more channels and imaginative ways for advertisers to encounter customers, but it also has become more difficult to figure out where the target group spends their time and how they should be approached.

"There are so many different channels and customers receive so many different messages so that standing out from the stream is difficult."

Two target groups that were perceived to be the most challenging ones were the group of young men and the group of busy families and especially women who are not heavy-users of media.

"Perhaps one challenging group is young men because they are not that loyal users of any particular service, and even if they are, these are usually smaller services, so that reaching them online in one specific place is difficult."

"The most challenging target group is the group of consumers who don't have a lot of time to spend with media. Quite often they are busy women with the family. Youngsters are usually easy to reached, whether it is via the Internet or mobile, even with TV we are able to reach them more easily than these women. So that is one of the greatest challenges. Those persons who don't see themselves using traditional media that much."

Interviewees were unanimous about the great potential of customizing advertising content and messages to different target groups in second screen. The benefits of this were mainly seen in standing out and offering more relevant advertising messages in order to appeal specific target groups.

"Absolutely, this targeting is one thing that interests all the advertisers, because by targeting you are just able to improve profits a lot."

"I think that the possibility of defining yourself which kind of ads interest you is something customers do want in the future [...] it's less messy and it becomes more easy to stand out, and it probably allows us to reach those good contacts."

"Well, it costs to create different materials for different profiles. But on the other hand, we are then able to optimize better, to see what actually does work and what doesn't. It's more efficient."

"Perhaps we are just wasting our efforts by paying for useless contacts. This would be clear and fair that if someone wants to receive these adverts then she/he more probably is part of my target audience and the advert doesn't go wasted."

In conclusion, paying only for the right contacts was seen to increase cost-effectiveness. Even though creating different materials generates more production costs, the prominent attitude among the interviewees was that it is not a problem.

5.2 Different ways for creating profiles for targeting

The interviews included more precise questions about advertisers' insights into different profiling methods (Figure 1). Three different methods were presented as examples:

- i) Users would be able to create their personal advertising profile on their mobile application by rating which categories of activities, products and services they are interested in general. Based on these ratings advertisers would be able offer these users targeted commercial material on those categories they are interested in
- ii) Users would be able to log in to application by using their Facebook accounts. The application could pick up interests from Facebook profile and advertisers could offer targeted commercials based on this information
- iii) The application could be a system that learns user's preferences by the actions he/she makes. Application could learn from the actions (whether user clicks an ad or whether user seeks information about products) or he/she could give feedback to application about the relevance of the ad. The rating system of the relevancy could be based for example on simple functions of giving the ad a thumb up or down.



Figure 1: Different methods for profiling

Overall, advertisers prefer a combination of these methods. Additionally, they would still want to use the traditional targeting based on TV programs watched beside the three profiling methods suggested.

Voluntariness was seen as a key factor for successfully carrying out the profiling as it was seen to increase commitment and positive attitude towards the service. The most preferred way to form a basis for targeted adverts was therefore seen to be the option that permits users themselves to define their own preferences. By defining their own areas of interests they would agree to receive commercial messages of products and services that belong to certain categories.

“Because if you have yourself given permission, I believe that you would be more committed and would not perceive it that disturbing.”

However, solely relying on this profiling method would pose some challenges too: advertisers and users might not have similar view about which services and products belonging to certain categories. Some advertisers might consider it as a disadvantage to restrain their product to just one category whereas users might get irritated when receiving a message they themselves don't perceive to have accepted.

“As an advertiser one might start to wonder that how could we reach for example moms, and not only people who are interested in cars and read car-related magazines. Because when the purchasing of the new family car is topical, we should already have a mental image of our brand in their minds. And this is strength of traditional TV advertising.”

In addition to users self-reported interests some basic demographic information collected by the application was seen beneficial, for example gender, age, family situation and location. Location could be used especially to offer regional information about retailers.

“Age and probably the situation of family or life. Our customers behave differently if they are single in comparison to those ones who have children. It has effects on everyday life so that's why this kind of information is very important.”

“We would check out where the customer is living and then we'd assume that people in, let's say 50 kilometers range from the store would be willing to travel there, so we would send this messages to those people. That could be very interesting, even if something like that can be done already for example with postal codes.”

Other option that was seen as potential was a possibility for users to tell whether the advert received is relevant or not by giving the advert evaluation by either liking or disliking it via their mobile device. System could learn and begin to provide only the relevant messages.

Even though Facebook profile information would be desired for creating more precisely targeted advertisements, it was seen as a most difficult option. The interviewees took into account the rising concerns about privacy in online world and were doubtful about users' willingness to log into the commercial service with their Facebook accounts.

”There is this problem with Facebook that you can’t be totally sure of what information they give away. It’s important to feel that you are in control of giving away the information you actually want to give.”

It could be concluded that the richer the information the better from the advertiser point-of-view. For example information about the usage of media in general could give valuable information for targeting.

“The music I listen, books I read, movies and TV-programs I watch, tells a lot of me and my interests. And it helps with targeting, even though these are always stereotypes. But if you read classic novels, visit opera houses and watch Kaurismäki movies, we would like to advertise red wine and blue cheese to you. And if you watch only ice hockey and formula one, we would probably like to sell you beer and unhealthy food.”

5.3 Suggested guidelines for designing targeting for second screens

From the advertisers’ perspective, the key questions about targeting highlighted in this research can be summarized as follows:

- Standing out from the advertising stream and increasing the cost-effectiveness are the most important starting points for targeting in second screen.
- Traditional challenges in marketing communications should still be kept in mind: target groups should still be large enough in order to be appealing and solutions should give enough space to differentiating creative solutions. Second screen solutions for challenging target groups, young men and busy young mothers, would be especially beneficial.
- Profiling should be as versatile as possible combining different methods and including rich information.
- Planning the incentives for users to give information for profiling is crucial.

6 Insights into offering interactivity via 2nd screens

Second screen enables interactivity related to advertisements. The potential of different possible interactive features were discussed in interviews (Figure 2). Interactive features covered for example social media features (commenting, liking, sharing), discount coupons and competitions, making purchases, getting extra information, playing games and combining game mechanics into an advertisement context for adding entertainment value. Additionally, as the most advanced interactivity, feedback about the possibility to even control TV stream and skip uninteresting ads on television by using a mobile device was proposed to interviewees.



Figure 2: Different interactive features

6.1 Perceived benefits from activating and motivating users

Advertising on TV has several acknowledged benefits: reaching large audiences including media light-users and creating emotional effects through videos. However, addition to relatively high production costs, the common topic puzzling advertisers' minds is how to mobilize the potential customers and how to activate the viewers to spend awhile focusing on the message conveyed. The changing habits make this challenge even more central: people have more possibilities to skip TV commercials either by fast-forwarding through commercial breaks or leaving a room and/or engaging their attention to other tasks instead. Interactive features on second screen could make activating easier, because it can happen instantly without extra effort from the user compared to the traditional way of including an internet address into commercial. Interactive features were seen as a great way of making a user to spend some time with the brand and building attachment to the brand.

"Interactivity is really important because it's a way for making people to stop and spend awhile with our product and our message, and that is what increases the attachment and liking and it's very important."

Another benefit would be the motivating effect for giving information for profiling or using second screen in the first place. Users must first be convinced that by creating a profile or by accepting extra advertisements they could be able to gain some extra benefits, for example financial benefits or entertaining content.

"This interactivity has to be somehow rewarding. It doesn't necessarily mean that one should gain some financial benefit, as it could be some other content aswell. The idea of activating viewers with gamification seems to hit that spot. And also this additional material, whatever it might be, lets you to get beyond the surface."

6.2 Virality and sharing ads with friends

Altogether the idea of sharing advertisements as such was not seen something that enough people would be interested to do. Sharing even more ads on Facebook could lead to overload of commercial messages on Facebook walls which is not seen as a profitable outcome and was rather assumed to lead to irritation and possibly even to negative images of the brand.

"I've noticed that people get fed up with someone sharing a lot of stuff on Facebook, they receive a lot less likings and comments than personal status updates do, so I'm a bit on a fence about this."

On the other hand, it was seen as an intriguing possibility to be able to share some specific elements of ads. One example of this is the theme song that would at the same time include a brand name or a logo of advertiser. Thus social media visibility is accomplished without sharing the actual ad and it might be seen less irritating by friends.

"For example, I might not be interested in that specific advert at all, but I still could share its theme song somewhere. One incident with Stockmann's commercial comes to my mind, I was trying to track down which song there was playing until I found out that it was a song by some advertising agency and I would not be able to download it. So, it would be clever if there was different elements available for sharing."

Other way of making sharing on Facebook more appealing could be the possibility of gaining some profit by doing so. This could include for example discount coupons, competitions and similar mechanisms that are used already in social media campaigns.

"You could for example notify three friends, and if everyone of them will purchase Sonera Urho –channel with all the national ice hockey league games available, then everyone gets a discount for twenty-five percents. For sure I would try to find friends who'd be interested. This is something I could share myself."

6.3 Additional interactive features on 2nd screens

Interviewee brought up a wide range of possible interactive features from discount coupons to testing new products, but it is not possible to give general guidelines about the most important features. Different industries and brands are not able to gain equal benefits of all the features presented. As an example, not all the industries are able to benefit from the purchase option; or neither are they all able to offer discount coupons to users.

The most effective way of making users committed to using the application was assumed to be features that offer some kind of financial benefit for users, as for

example receiving discount coupons to mobile device as an extra commercial material.

"I somehow believe that it is significant to be able to gain some financial benefits, to be able to get something with a lower price. And also the entertainment factor is significant, for example some sort of gamification."

Gamification was also seen as one of the most fascinating features. Game mechanics were seen as a way to possibly commit users to watching the commercial break on television for example by making users to spot certain figure in commercial during some period of time to gain some benefit (either financial in the form of a discount coupon or enjoyment by as an example beating one's friend in scores). Game mechanics were also seen as a potential way to reach challenging group of young men.

"This gamification. The idea of spotting adverts is very interesting from advertisers' point of view. So that there would be a good reason to watch commercial breaks. You could for example be able to get some code that will grant you some kind of reward. That's a very good idea."

Additional idea for interaction with second screen users came from the food industry: second screen could also provide a platform for giving product samples and asking feedback for new products or services users have tried.

"You could add to this a possibility to ask feedback from the users who have decided to receive a coupon. You could ask something like has she/he used the product and if she/he liked it. Many times we have been wondering how to get people to try out our new products."

6.4 Possibility of skipping TV ads

The interactivity was taken also a one step further in the interviews and interviewees were asked to comment an idea of the possibility for users to have an impact on a commercial stream seen on TV during the commercial breaks. In this scenario, users would be able to skip uninteresting adverts on television by using their mobile devices and they would receive a new and hopefully more relevant advert instead of an uninteresting one. Overall the feature of skipping the adverts was seen as a great challenge to advertising professionals. It would create even greater competition and pressure for creating even more impressive ads.

"It makes me wonder about the future of advertising. It would increase the competition on the field. Adverts would have to be even more exotic and exceptional to gain people's attention. It would have a great impact on a quality of adverts for sure. Nevertheless, on the other hand it would make it very easy to verify whether people like your advert or not."

In addition to growing pressure to create even more interesting advertisements, the other challenge is that family members sharing one main TV might each have their own personal 2nd screen devices. Questions of who's in control over the TV

commercial stream might be difficult to take into account while building a functioning prototype of the concept. If more than one member of the family is using the application of being able to skip ads on TV, the other members who actually might belong to the target group of certain ads will also miss them.

Possible existence of this skipping feature was assumed to create new ways for determining the costs of TV advertising. New ways of defining the cost of placing adverts on TV were envisioned to be based on the amount of times the certain spot was actually watched. Another imagined possibility was users to decide themselves whether they watch the commercials on TV or whether they are willing to pay for being able to skip them.

“Certainly advertisers don’t want their adverts to be skipped. You’d rather offer a chance to choose to pay for not to watch them instead, since whoever will eventually launch this kind of service wants a cash flow.”

6.5 Suggested guidelines for designing interactive features for second screens

From the advertisers’ perspective, the key questions about interactive features highlighted in this research can be summarized as follows:

- Developing features that activate and motivate users to watch, react and try out products is interesting for advertisers. Discount coupons and game-like elements were perceived the most motivating features by respondents.
- In order to encourage sharing, second screen advertising could include elements that are familiar from marketing in social media.
- Different interactive features should be designed for different industries and brands in mind.
- Advertisers perceive the idea of affecting the actual advertising stream inside commercial breaks in TV quite unfamiliar and far-fetched. Ideas are concentrated around providing something extra with second screen.

7 Insights into providing extra information on 2nd screens

As one interactive feature, the relatively simple benefit of providing users more information about products and services in TV programs or TV commercials was valued surprisingly high. In television, the spot time is often limited and the goals of building attention and affecting emotions can limit the amount of informative content. Second screen offers a possibility to tackle this challenge.

7.1 Perceived benefits from extra information and “ads on demand”

Advertisers feel the growing need for supplying more information about their products and services to customers as the ongoing societal debate creates new

concerns. The consumer awareness and expertise are growing and consumers are more conscious about the environmental, ethical and health related issues, just to mention a few. Second screen was seen as a useful way of offering the customers the extra information that the advertisers are not necessarily able to present on a television spot. For example, the information user could receive on mobile device could include details about nutritional facts, technical details, green solutions or origin of raw materials.

"This debate over food on past years has reflected to our business as well. People being uncertain about the ingredients used is a real challenge to all our industry."

"For example, as this new model of [product name removed] was launched and we have been marketing it, it's interesting and it looks cool. So during a TV spot there would be an opportunity to go forward, and get extra information about it, about the resellers, and a possibility to book a test drive."

Another benefit could be to provide users access to extra information or commercials whenever it's convenient and interesting for them. The idea of this "ads on demand" service could be for example to save ads for later use (e.g. after TV show) or to gather all the ongoing television commercials to one service. Users would be able to seek out the most liked and most popular commercials. Commercials could also be browsed categorically based on a certain product or a service. Users would benefit from the feature as it could make it effortless for them to gain the extra information needed.

"Nowadays customers appreciate it, if you make things easy for them. So that any given time they would be able to ask for more information and someone to contact them."

"You could imagine that those people who are thinking about purchasing a new car would check this content out in order to find more information, so that this would become another channel for seeking information, much like the Internet."

7.2 Challenges with the concept of "ads on demand"

The simple provision of extra information in an interesting way via second screen was considered to be useful for many brands, because the content is so easy to customize and produce. However, the idea of saving ads for later use and for watching them any time suitable for users awakened more questions.

The most profound challenges started from the speculated motivations to use this service either because of current need for a certain product or service or the interest to watch commercials just for fun and entertainment. Users' motives for using the service would define what kind of content is most suitable for this service. If the main incentive for using the service was to seek out the best offers for some currently needed item, the content of the service would rather be

presented as a short information spots, preferably on regional categories. On the other hand, if the purpose was based on entertainment, the content could include longer and more impressive commercial films.

"If you want to make comparisons between let's say ten washing machines if you are planning to buy one, you might not be interested in watching ten long adverts, you would rather want to see short bulletins. And later on, if you wanted to get some extra information it would be possible, and you could be able to watch a longer video as well."

"People are interested in finding funny commercial videos and car advertising video to share with friends."

This kind of service would be suitable only for some brands. For example daily consumer goods might not be the potential targets for the service. The industries that promote products that evoke emotions and are able to become a part of their owners image, i.e. cars, technological devices, might be able to benefit from the concept since people are perceived to be interested in looking for well-made commercial videos.

"I wouldn't consider this very potential on our branch since we don't advertise any weekly offers. Our advertising is more focused on brand marketing and on seasonal products. Furthermore, I don't believe people are particularly interested in saving and sharing adverts of this branch."

7.3 Suggested guidelines for providing extra material on second screens

From the advertisers' perspective, the key questions about extra material highlighted in this research can be summarized as follows:

- Simple feature of providing extra material can be an important benefit for advertisers.
- The possibility for users to access extra material or commercial videos whenever it is convenient for them is more challenging to design: it is difficult to serve users seeking information and users seeking entertainment with the same advertising content.

8 Insights into more precise measuring of advertising effectiveness

Second screen provides opportunities to measure advertising effectiveness differently from the traditional measuring of TV. It is possible to get real-time feedback about the actions users commit via 2nd screen application, for example likings, sharings, clicks made, coupons reclaimed and purchases made. By combining this data with social media or the profiling information discussed

earlier in this report it would be possible to describe in detail the user groups that have reacted to ad and groups that have not reacted.

8.1 Perceived benefits from more precise and richer measurement

Different kinds of goals for advertising campaigns require different kinds of evaluation methods for drawing conclusions on whether the campaign has succeeded or not. Measuring the effectiveness mainly lies on monitoring some key statistics, for example GRP or effects on brand awareness in TV and click-through rates in mobile. The importance of monitoring the sales rates and other behavioral measures is perceived to become more important.

”The sales. It must show immediately. If the spot is on line at 18:35 then it should be seen in online store at 18:45. More preferably at 18:36. Because the tendency is moving towards real-time platforms we are monitoring the sales, numbers of visits in web and Google searches. Or even the sales in a brick-and-mortar.”

The quest of more precise measurements is not related only to TV advertising but is a wider phenomenon. And even though there are number of ways for advertisers to keep in track of how the certain campaign is welcomed by the customers, it is difficult to tell which element of the advertisement combo has been the effective one

”All marketing could use more precise measurements. For example, if you have a campaign with a little bit of radio, little bit of printed media, little bit of the Internet, then there’s no way of telling what has made the customer to walk in to the store. There’s a lot of talk about measuring the effectiveness of advertising, and about ROI and so on.”

But the benefits of more precise measurements through second screen are perceived especially useful with TV commercials for two reasons. First, the connection between sales TV advertising is currently difficult to prove.

”In other words, statistics might point out that the sales was good, and the amount of TV advertising was big, but those two are not necessarily connected with each other.”

”After the campaign is over [the name of the company removed] will execute a research and an interview study. What have been the expenses and what has been accomplished, how effective it (campaign) has been among different target groups and how our messages have been conveyed. The value of this lies much in the fact that they have been done in several years so the comparison is interesting [...] but does it necessarily collate to what the sales are, not necessarily.”

Secondly, TV statistics are only an estimate of viewers based on a panel. However, during the commercial breaks many people concentrate on other tasks instead of actually watching the ads. Advertisers find information insufficient

since it lacks the actual facts about how many people saw the ad and if they perceived the ad interesting or not; and more crucially, did the ad mobilize anyone to take an action.

"And if I say yes then you are able to monitor my TV watching habits, and the information builds up in a data bank, and then you'd be rewarded let's say once every six months by giving you for example movie tickets for being monitored. So I'd say, that we would be able to get hundreds of thousands of people that do it, so it'd be a great deal of information, it's much more valuable than when a certain number of people are pressing a button while watching TV. "

"At the moment we only get information about how many TV's have been turned on, and not about how many people actually see the advert. This way it'd be possible to get more precise statistics about the people who actually saw the ad and in addition to also get feedback on whether they liked it or not."

The other benefit would be to get richer information about the specific customer groups that have reacted to the advert. The advertising professionals were interested to be able to get as much background information about the users that have reacted to their ads as possible. However, this more qualitative data requires notable amount of active users in order to be useful for advertisers.

"This could serve as a clear signal, you could be able to spot if your ad has a certain kind of effect on certain target group, and some other effect on other groups. For advertising agencies it would be good to gain feedback, also the negative one. It's more effective to create targeted adverts than to create adverts that are neutral to all of the groups."

"The more profound insight you gain about the group of people who react to your ad, the more use you can make out of it. So I wouldn't say that there's only a few important background facts, I'd say that we should get as much information as possible."

In addition to basic demographic details also the information about their interests would be highly valued. Location, life situation, interests and TV programs followed would all be useful.

"Well, of course the interests listed on Facebook, and the daily amount of time spent on Facebook."

"Background information about those people who have reacted to the ad is important. For example interests, whether or not they perceive to be part of the target group and the information about during which TV program they moved forward to this ad, because based on this we could target our other advertising as well."

8.2 Perceived benefits from the possibility to react to feedback

The third benefit from measuring the effects of second screen advertising would be the possibility to flexibly react to received feedback by modifying campaign messages and content.

”Current campaigns lasting about couple of weeks usually have only one advertising material so it is not that flexibly altered. Real-time feedback about the campaign would be greatly appreciated if there was a way to flexibly modify the content during the campaign.”

The flexibility of the system was seen as an important benefit of second screen because television campaigns are often difficult and/or expensive to change during the ongoing campaign.

”Bottom line is that why bother doing a follow-ups if our client is not going to react on the results. If it seems that the advertising campaign is not working, is our client willing to change the advertising message, or alter advertising formats. For example, cancelling a TV campaign is extremely difficult. Well, it is possible but it's very expensive.”

Some interviewees developed this idea even further: they suggested that second screen concept could be used as testing platform for marketing messages and campaigns. By monitoring the results in second screen, alternative marketing messages could be tested with different target groups before launching them for wider public for example as a traditional TV commercial.

”There are advertisers who use a lot of money for testing their concepts in advance to see which one gets the best score. As a consumer you don't actually see the ongoing process. I see a potential for this service to serve as a real-time panel. On the other hand, then this would become our competitor on the field since we already conduct this kind of testing on online panels.”

8.3 Different ways for receiving the data

The companies that execute advertising campaigns usually receive the measurement data via their media agencies either in the end of the campaign or in real time via dashboard online reporting system. Media agencies commonly analyze the gained data for the customer companies. This is mainly because of the high expenses of purchasing the raw data and because of competence requirements for analyzing the data. With second screen data, following this same practice would be easy for advertisers.

”Probably the most convenient way would be to receive analyzed data via media agencies. It would be the easiest way to receive this data via the media agency who has reserved that certain campaign for us, gets the results and later on we can together check them out.”

Media agencies on the other hand are happy to receive all data that is available.

"It would be real-time data about the things that are going on. I'd have a simple access to that data any time, by hours and by minutes, that would be huge."

However, addition to this more complex data, advertisers would be interested to invest in gaining user data straight via second screen application if it was in real-time but in simple form.

"It is kind of a mathematical jargon. Even us, advertisers, do have inabilities to comprehend the data. Somehow you wish it to be more simple. Those companies who realise it, that even the companies who buy a lot of advertising do not necessarily understand it, they have an outstanding opportunity, if it somehow could be translated into understandable language and real-time. Kind of the same way as we once a day get information of the ongoing conversation about our company in online media."

"Information in a simple form without the need to go through matrixes and such would be greatly appreciated."

When talking about the reasonable price for this extra data, the usual costs of marketing research was mentioned as a reference point.

"Probably the regular cost of marketing research would be suitable. I mean that if you are able to get a good report this way, then the pricing should be similar to other marketing researches."

In conclusion, the data can be delivered both through media agencies in a more complex and detailed form and straight to the advertisers in more simpler but still real-time form.

8.4 Suggested guidelines for developing measurement on second screens

From the advertisers' perspective, the key questions related to measuring highlighted in this research can be summarized as follows:

- Complementing data about TV commercials with second screen data provides opportunities to get a better linkage to actions, to monitoring the real behavior and to analyzing background information about the groups that have reacted positively or negatively to ads.
- The same rule applies to background information in measuring effectiveness than in targeting: the more information the better.
- Second screen should provide advertisers an opportunity to flexibly and effortlessly make changes to the content of advertisements.
- Extra feature could provide possibility to use second screen as a testing platform for different campaign versions.

- The data could be delivered both through media agencies in a more complex and detailed form and straight to the advertisers in more simpler but still real-time form.

9 Insights into the business model of second screen advertising

The newness of technological solutions or the ability to try out new media channels do not seem to create a barrier for adopting second screen concepts to the advertising portfolio. Managing an advertising campaign in multiple media channels supplementing each other is a familiar procedure to advertisers. Both awareness and interest in using new kinds of advertising concepts utilizing the new technologies are growing.

Although advertisers generally keep an open eye for the uprising trends and new advertising solutions it is crucial and challenging to be able to spot the profits of each solution, because the information is coming from different directions. Usually, advertisers receive information and suggestions about the new advertising concepts either from their media or advertising agencies or straight from the smaller companies that are designing new concepts like different mobile marketing solutions. This would suggest that established players, for example an established media company or a telecommunications service provider, could have a central role in creating reliability and status for new second screen advertising concepts. This could also contribute to shifting the emphasis in mobile marketing from one-time experiments to more continuous practices.

“Entrepreneurs do approach us a lot, some of them we listen to and some of them not, and then some of it leads to co-operation [...] it is kind of a race, even though you don't need to jump into everything since there's a lot of hype out there. What increases the business, that is the thing I've asked many times.”

“The challenge lies in being able to see the big picture. As it is not the most important thing to be everywhere at once, but to be at the right place at the right time.”

Producing relevant content and advertising material to this kind of new environment is not considered to be a problem either. But legal questions lead to some restrictions: the using of material in second screen has to be clear already in advance, because copyright agreements usually require separate contracts to each media channel used. This means that old advertising materials can be difficult to utilize in second screen and it might be a risk to invest on producing complicated material if the benefits of second screen are not yet understood.

“It is both extremely difficult and expensive to make changes to contracts afterwards. It should be known from the early stages if you are later on going to use same materials on this kind of service.”

The most important practical concern of advertisers related to the business ecosystem is the simple question of how many people is theoretically possible to reach via second screen. If the main service provider is the actor in IPTV-field, the second screen solution reaches only the customer of IPTV. If the main service provider is a broadcaster and second screen solution is connected to a certain TV show, the second screen solution reaches only the viewers of that show. Even if all players in the field cooperate, there is still the challenge of device requirements and the need for uploading a specific application, which is assumed to be too troublesome for some potential users.

"I would say that the majority of the advertisers would absolutely be interested. But their next question would be, that how many people are we able to reach with this service (...) They'd be interested to know what kind of audiences are using the service. Then the following question would be, that how active media users those people using the service actually are. They would be interested in this kind of basic information in order to see its potential."

"First of all, we should be able to get an idea of who we are able to contact with this service, and whether or not it is the right audience for us. Secondly, we would then have to figure out what kind of message we would want to target specifically for them. As far as I'm concerned, it is difficult to imagine us having a new solution and starting to use it blindly without knowing these facts."

One typical question from interviewees was also the need to limit the second screen usage in watching the television programs real-time. In the ideal situation the second screen solution would be so attractive that it motivates people to follow advertising even if they watch TV recorded or via Internet television.

"I'm not that sure whether the idea of being real-time is essential at this context. Perhaps we should concentrate on how to reward people for watching TV commercials."

"Would you be able to receive these ads even if you are watching an Internet TV, as an example. It would be interesting if these ads were received even though many people skip commercial breaks or change the channel during breaks."

Professionals were solid in their view that the new concept could have several different kinds of pricing mechanics at the same time as the functionalities of the concept are versatile. The pricing based on contacts in the beginning would attract advertisers to try the concept in order to see if it's beneficial for their marketing.

"If a very tactical advert is in concern, or let's say that you have an online store, then the pricing could be based on the sales. Whereas if it's more relevant to target the message to certain groups, then the pricing could be based on the reach. And if there's some additional material, then the pricing

could be based on the number of views. There are so many possible ways of pricing this service.”

”At the beginning the pricing should probably be based on the number of possible contacts. It is important to know how this is functioning, who are using the service and so on, as it creates a lower threshold for advertisers to invest on something new like this. Of course later on as the service becomes more commonly known, the pricing could be based on some other criterias.”

One focal question in future business models of second screen solutions are their impact on traditional TV advertising practices and thus, broadcasting companies. Overall, interviewees believe that TV will still be important media channel in the future. TV still has a great mass appeal and it reaches variety of people with different backgrounds, even the light-users of media. The possibility of creating impressive movie-like advertisements is still going to be the strength of TV.

Otherwise, the impact of second screen is under debate. Typical answer is that something is going to happen but it is impossible to say exactly what.

“Will the role of television alter in the future to something other than before? I’m sure that these kinds of subjects were debated back in the days as well, concerning the role of radio, TV and Internet. Some might have been concerned that there’s was no longer room for this or that, but as the time has gone by the simultaneous use of these mediums has yet increased. So, I’d say the role of TV is probably going to change in the future, yet you can’t predict in which ways. Simultaneous use with other media devices will certainly increase.”

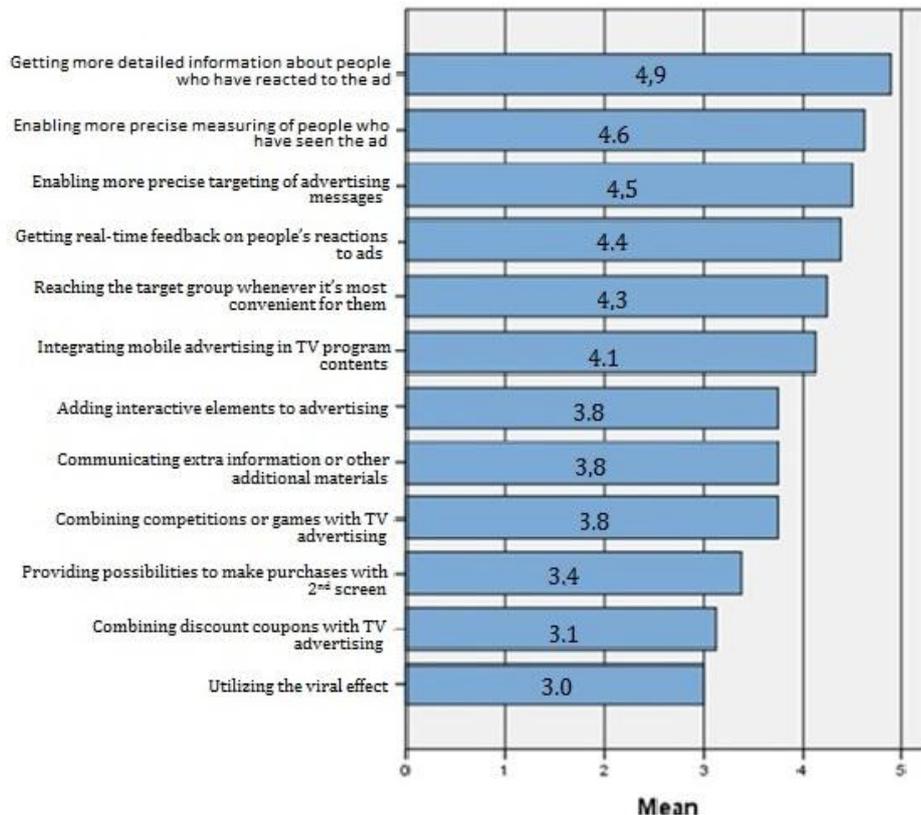
Some professionals saw a possibility that second screen might decrease the benefits of traditional TV commercials by aiming customers attention to accomplishing different kinds of other tasks instead of concentrating on the message the advertiser wants to convey. Also the role of commercial breaks was discussed, because with second screen advertising could become more integrated into television programs. Others are positive about the enriching value of second screen and its possibilities to motivating users to spend more time with advertisements.

”The role of commercial breaks in the future will definitely be debatable. There should be some kind of integration figured out so that people would be encouraged to watch commercial breaks. On the other hand, why not to transmit TV programs without commercials and advertising on other times, why would we have to stick to an idea about commercial “breaks”.”

10 Conclusions: Most significant pain points and related focus in second screen solutions

In the end of the interviews, relative importance of different possible second screen benefits was discussed. According to 5-scale questionnaire filled by the

eight participants (Figure 3), the most important second screen benefits were related to measuring and describing in more detail users who have seen or reacted to ads. Also the possibility for even more targeted advertising was perceived to be important. Different interactive features were not rated as important as more precise measurement of advertising effectiveness. Utilizing the viral effect gained controversial evaluations mainly because it is perceived to be very challenging to create a campaign that actually has good viral potential. This result cannot be statistically generalized, because it is only based on eight interviewees. However, its purpose is to illustrate and summarize the insights of interviewees.



1=Very insignificant, 2=Rather insignificant, 3=Neutral, 4=Quite important, 5=Very important

Figure 3: The relative importance of possible second screen benefits by 8 respondents

In conclusion, the most significant pain point seems to be the ever growing need to measure advertising effectiveness in a more precise, real-time and easy way. Second screen can provide richer background information about those users who have reacted to ads. The second pain point is also related to measuring user reactions: second screen could provide more flexible and cheaper way to make changes to content during the campaign. Second screen could also answer to following challenges: activating the advertising audience, targeting advertising in order to be cost-effective and stand out from advertising stream, and communicating more information to consumers with growing expertise and awareness.

Following tables summarize these most significant advertisers' pain points. With each pain point, current trends affecting on the background are described and suggestions for focus on designing 2nd screen advertising solutions are pointed out.

The most significant pain point for advertisers was perceived to be the lack of sufficient and real-time measurement for effectiveness of TV advertising (Table 2). Advertising professionals feel that it becomes more and more important to measure effectiveness. However, the ways to measure traditional TV environment are limited and data is difficult to comprehend for some advertisers. The potential and wanted benefits of the 2nd screen solutions could include richer information about users' actions and feedback reported real-time in a simple form.

Table 2: Pain point number one: the lack of sufficient measurements for effectiveness of TV advertising

Trends and influences	Advertisers' challenges and pain-points	Focus on 2nd screen solutions
<ul style="list-style-type: none"> - There's a growing need for measuring advertising effectiveness 	<ul style="list-style-type: none"> - There's not enough customer data available about TV-commercials - Direct customer feedback is unavailable for many - Unanalyzed data is difficult to comprehend 	<ul style="list-style-type: none"> - Recording user activity & customer feedback and reporting it to advertisers real-time in a simple form - Providing richer background information about those who have reacted to ads (traditional demographic details, location, life situation, interests, TV programs followed etc.)

Table 3 presents the second significant advertisers' pain point related to measuring too. Currently, TV provides insufficient possibilities to flexibly react to customer feedback during a campaign. Even though the campaign is proven to be ineffective, it is not that common for the advertisers to alter the content during a campaign. The second screen solutions could give possibilities to effortlessly make changes to content even during the campaign. Second screen solution was also seen as a potential tool for testing advertising messages.

Table 3: Pain point number two: Insufficient possibilities to flexibly react to customer feedback

Trends and influences	Advertisers' challenges and pain-points	Focus on 2nd screen solutions
<ul style="list-style-type: none"> - Advertisers have a need to react according to customer feedback and measurement data 	<ul style="list-style-type: none"> - It's often difficult and/or expensive to change the content of TV-advertisement during a campaign even though it's not effective 	<ul style="list-style-type: none"> - Possibility to flexibly and effortlessly make changes to 2nd screen content during the campaign - Possibility to even use 2nd screen as a testing platform for marketing communications – "every ad becomes a marketing research"

The third most significant pain point is the question of how to get the audience activated (Table 4). Nowadays it's not uncommon for people to watch TV programs delayed, either as recorded or via Internet television. This change in TV watching habits has led to people increasingly skipping TV advertisement. Advertising professionals struggle with the challenges of firstly making the audience watch TV commercials and then secondly to make audience take an action after they see the commercial. Important potential benefit of 2nd screen solution was therefore perceived to be the possibility to offer users interactive features that enable them to react instantly and easily.

Table 4: Pain point number three: Activating the audience is difficult

Trends and influences	Advertisers' challenges and pain-points	Focus on 2nd screen solutions
<ul style="list-style-type: none"> - TV watching habits have changed: People have more possibilities to skip TV commercials 	<ul style="list-style-type: none"> - People skip TV commercials - It's difficult to activate the viewers to take actions by commercials. 	<ul style="list-style-type: none"> - Offering interactive features on 2nd screen so people can participate and react instantly to advert (possibility to give feedback about ads, make purchases, play games and share content on social media) - Rewarding people for watching commercials by offering them possibilities to earn discount coupons or to take part in competitions - Additional possibility to later on ask for feedback for new products or services customers have tried

The fourth most significant pain point was perceived to be the difficulty to stand out from the advertising stream (Table 5). In general, targeting advertising messages based on different TV programs was perceived to be effective, but even better targeting would be more appealing and more cost-effective. 2nd screen solution would be able to offer advertisers a possibility to offer customized contents to different user groups based on their personal profiles. Advertisers prefer a combination of different ways for profiling customers.

Table 5: Pain point number four: Difficulty to stand out from advertising stream cost-effectively

Trends and influences	Advertisers' challenges and pain-points	Focus in 2nd screen solutions
<ul style="list-style-type: none"> - Even though it feels relatively easy to target TV advertising based on TV programs, better targeting would be more cost-effective. 	<ul style="list-style-type: none"> - How to make my advertisement more appealing to different target audiences? - Viewers are annoyed by irrelevant advertisements. 	<ul style="list-style-type: none"> - Possibility to offer different kinds of contents to different target groups. - Providing customized advertising material to 2nd screen (e.g. either during commercial breaks or during sponsored TV-shows) - Advertisers prefer a combination of different ways for profiling customers: 1) creating a personal advertising profile, 2) system learns from user preferences, 3) connecting with Facebook account and 4) yet still, also the traditional targeting based on TV programs watched.

The fifth significant pain point is the advertisers need to communicate more information about their products and services in TV (Table 6). Customers are increasingly concerned for example about the origins of the products or interested in technical details. Second screen solution could offer users possibilities to easily access this extra information and other interesting materials. Users would be able to mark these commercials as their favorites and access this data anytime suitable for them.

Table 6: Pain point number five: Need to communicate more information about products in TV

Trends and influences	Advertisers' challenges and pain-points	Focus on 2nd screen solutions
<ul style="list-style-type: none"> - Growing customer awareness and expertise (e.g. health, technical details, green solutions, origin of raw materials) - Advertisers' growing interest to provide more information about products and services. 	<ul style="list-style-type: none"> - It is not possible to communicate all the sufficient information during a TV commercial since the spot time is often limited. 	<ul style="list-style-type: none"> - Possibility to communicate extra information on users' 2nd screen. - Possibility for users to access extra information easily whenever it's convenient for them, for example after the TV show or when the information is needed

Overall, advertising professionals were very interested in the second screen advertising as a whole and saw great potential in many of its features. By focusing on the most significant pain points in developing second screen solutions would benefit advertisers and make it easier to gather the needed revenue streams and business ecosystem around future second screen concepts. However, more understanding about the user experience of second screen advertising is still needed.

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