Track the Success

Study on perception and reactions to moving image platforms

eye square

Agenda

01 Background & Methods

About Screenforce

The initiative of marketers of TV- and moving image content in Germany, Austria and Switzerland

Who we are:

- 12 partners representing 95% of the total advertising market in Germany, Austria and Switzerland

What we do:

- Research, marketing and communication for TV- and moving image content media

About eye square

- User, Brand & Media, Shopper Experience Research since 1999

- Offices in 6 countries

- 82 Consultants

- 300+ renowned customers worldwide

- Extensive global benchmarks of implicit data

- Innovation leader: Groundbreaking software (US patented)

- Licensing software to 8 out of the top 10 GRIT listed companies

Berlin   London   Hong Kong   Tokyo
          New York Mumbai
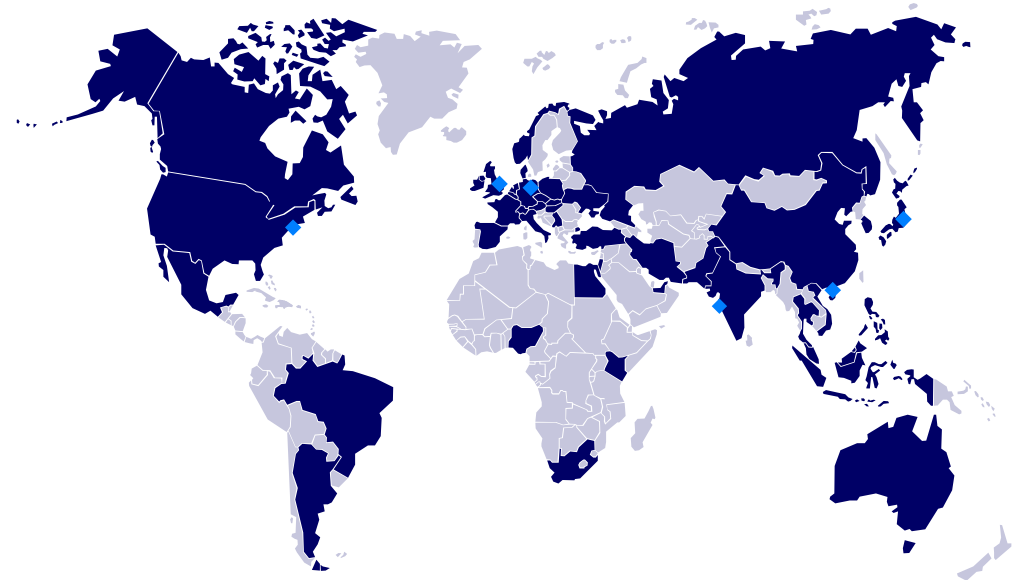
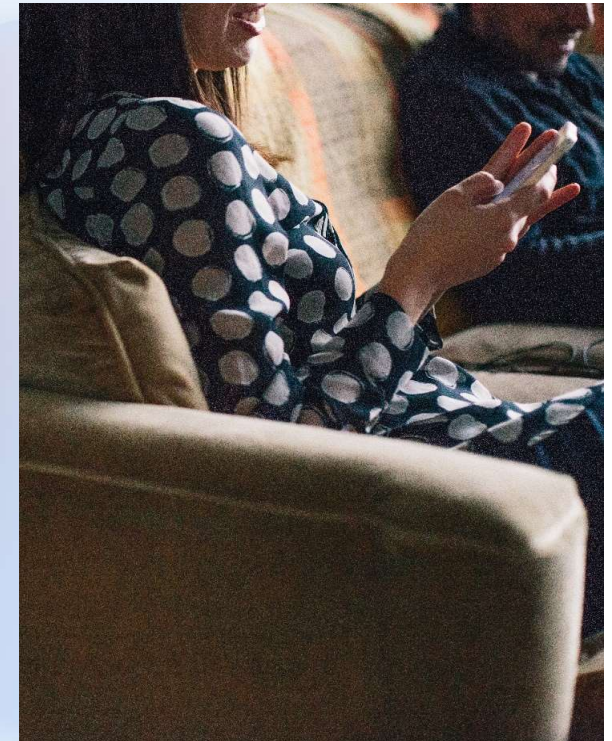eye square

The continuation of the basic study

Eye square takes the „Not all reach is equal" study to the next level

Main research questions:
- Media reception (perception and reaction) during the consumption situation
- Advertising impact on various channels

Additional influencing factors:
- Devices used
- Second screen usage
- Age effects

549 In-Home media ethnographies

The sample was composed of:

- Total N = 549
- 52% male, 48% female
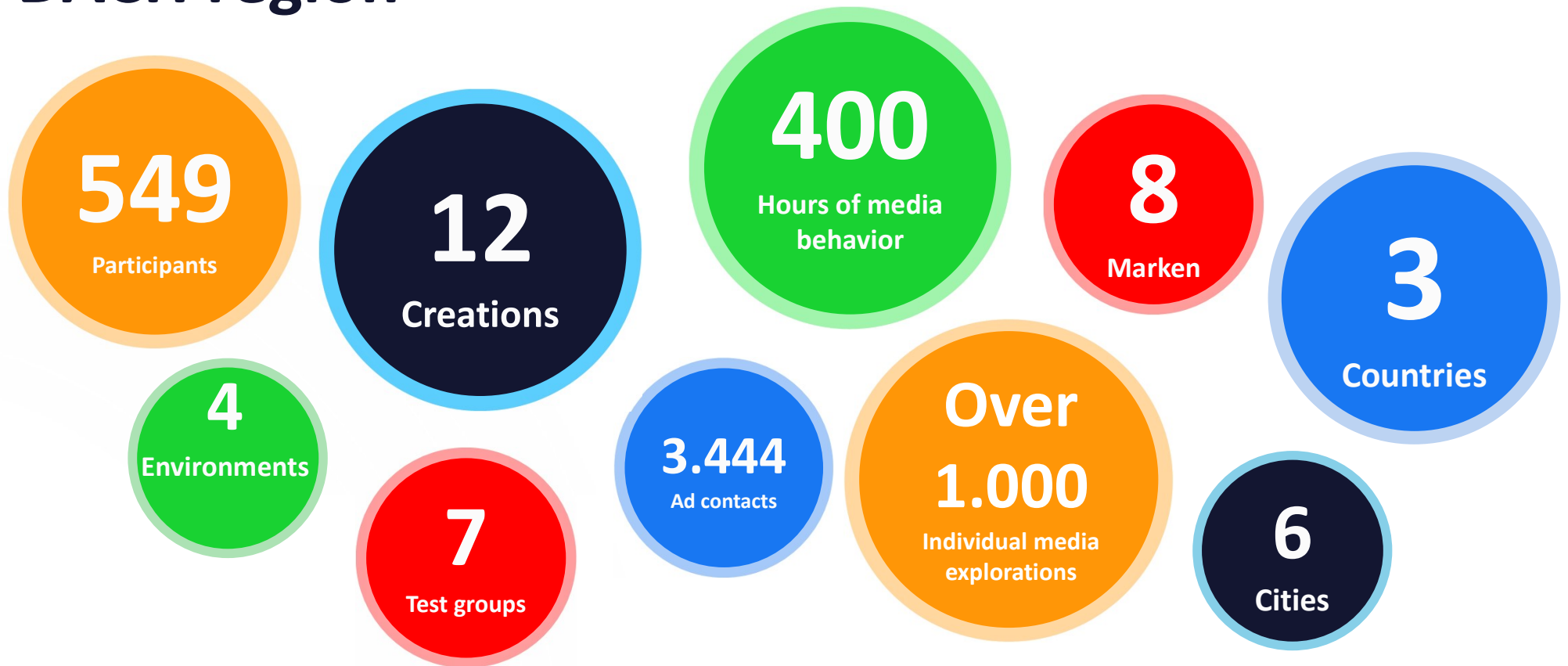- 51% 18-39 years old, 49% 40+ years old

- 79% from DE (N = 434)
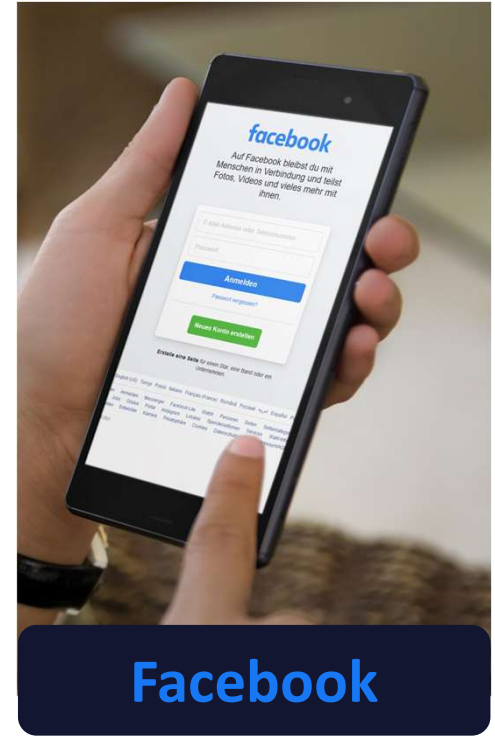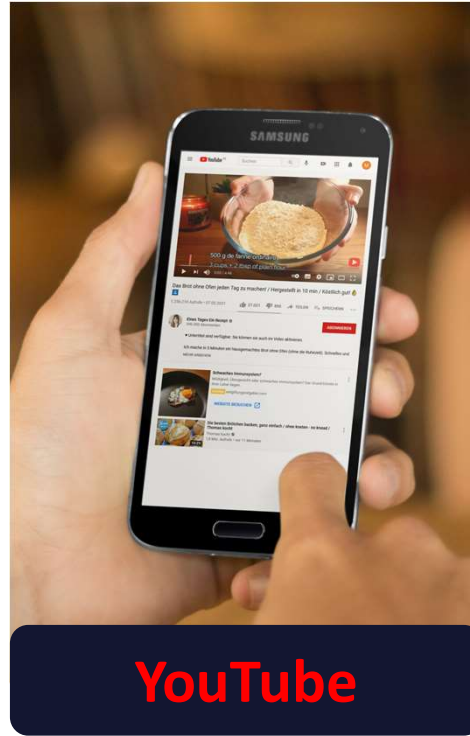- 11% from AT (N = 58)
- 10% from CH (N = 57)
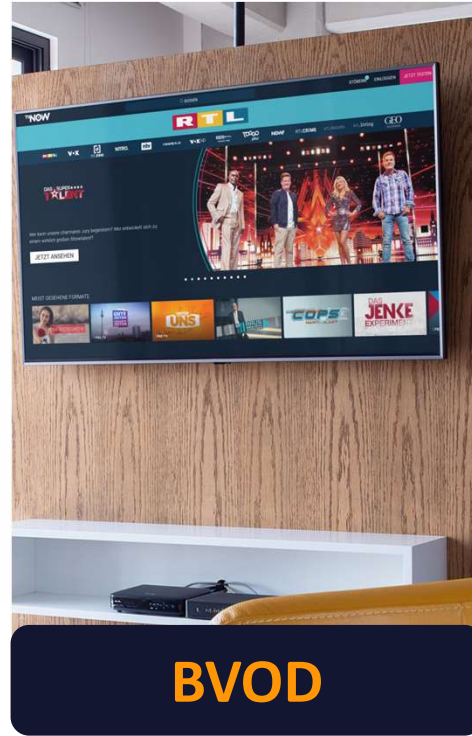
Test locations:
Berlin, Hamburg, Frankfurt a.M., München as well as Wien and Zürich

The largest media ethnography in the DACH region

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

549
Participants

12
Creations

400
Hours of media behavior

8
Marken

3
Countries

4
Environments

7
Test groups

3.444
Ad contacts

Over 1.000
Individual media explorations

6
Cities

eye square

Media platforms used

TV

BVOD

YouTube

Facebook
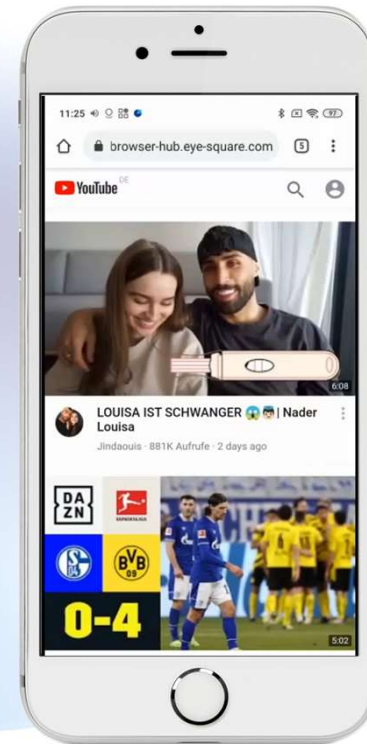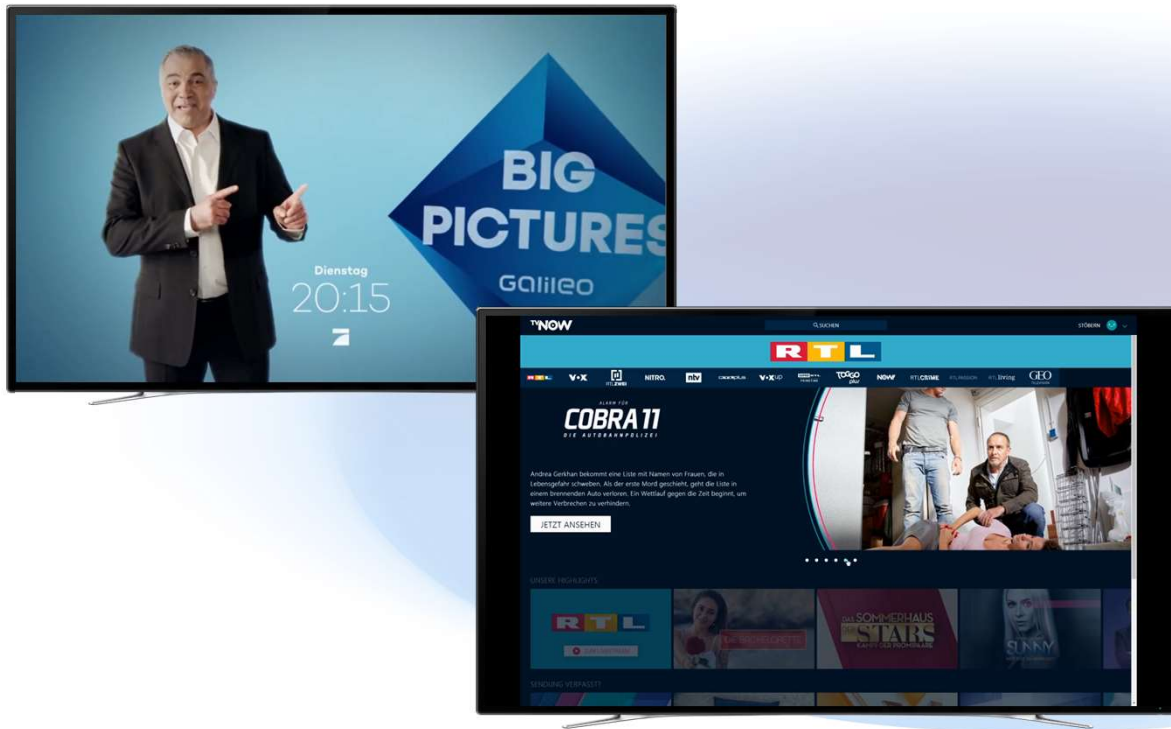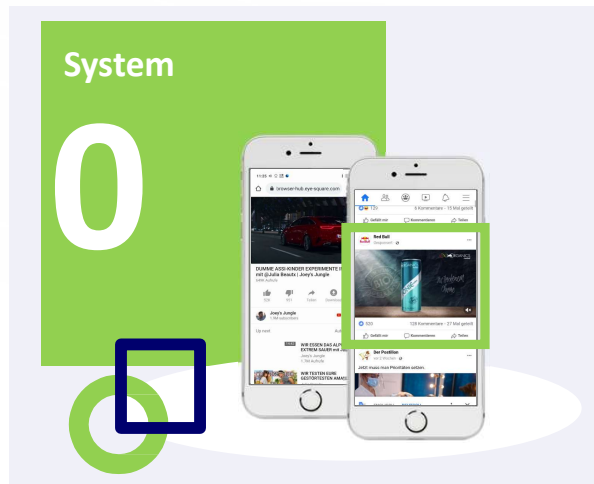
InContext: Ad replacements in detail

Realistic embedding of advertising into different platforms
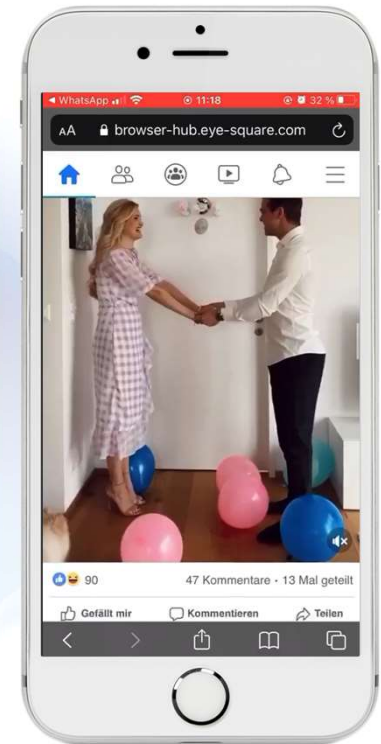
Advertising impact model

From advertising contact to individual response to final effect

Perception

Reaction
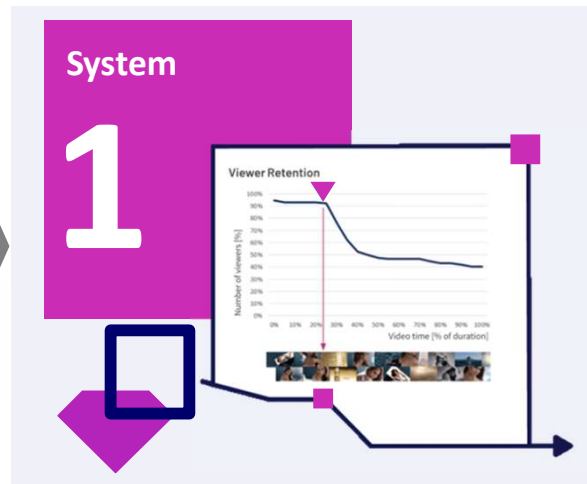
Effect

Advertising in the context of media

Gain detailed insights into the media experience via the setting
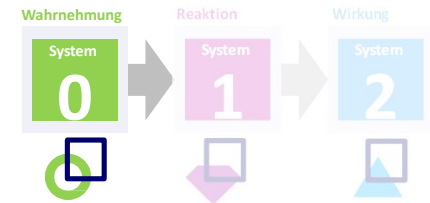
Screencover

Play duration

Scrolling behavior
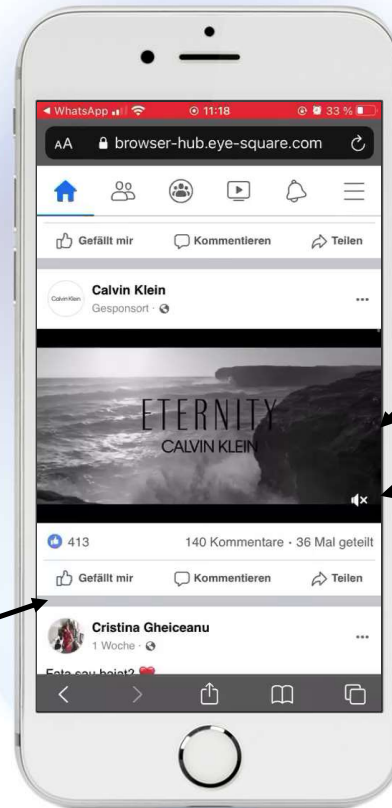
Attention to the screen

Comprehend the visual attention of the viewers
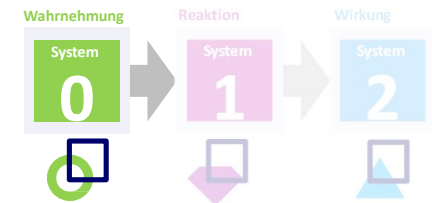
Facial recording through a normal webcam
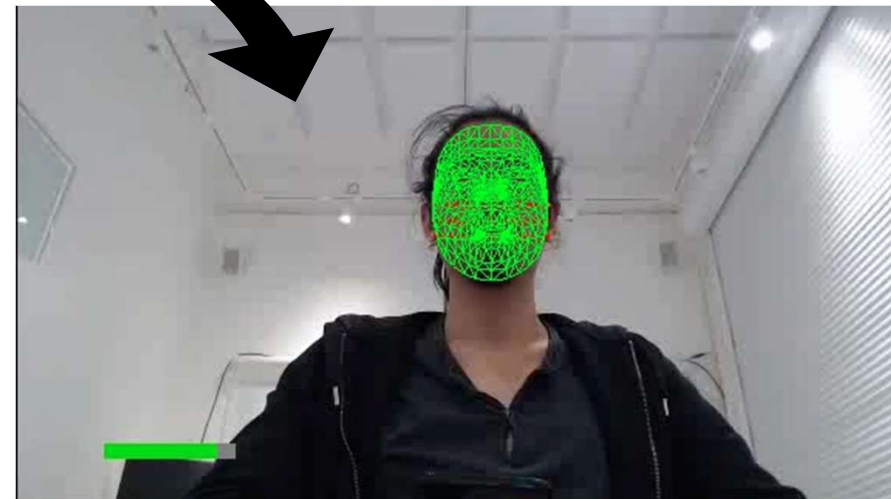
AI analyzes head rotations and indicates when attention was given to the screen

eye square

Reliably recognize emotions

Facial expressions provide insights into the emotionalization of the (ad) spots
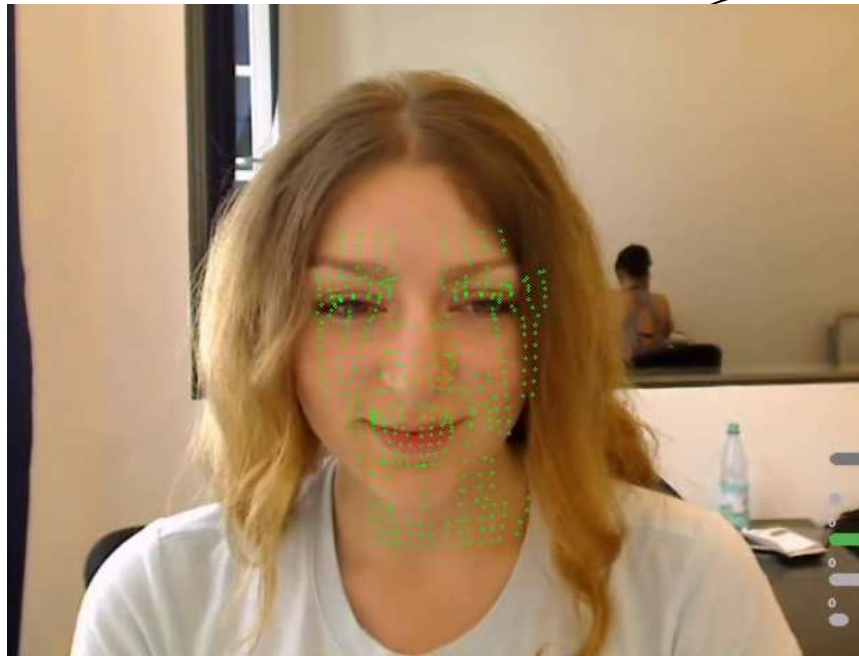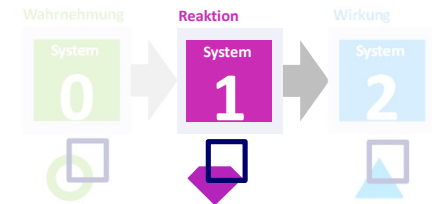
Relaxation and excitement

Detect reactions by measuring skin conductance
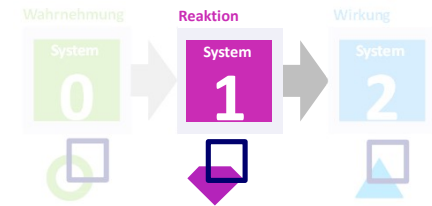
- In which state of mind is a viewer?

- How ‚activating' is the event

eye square
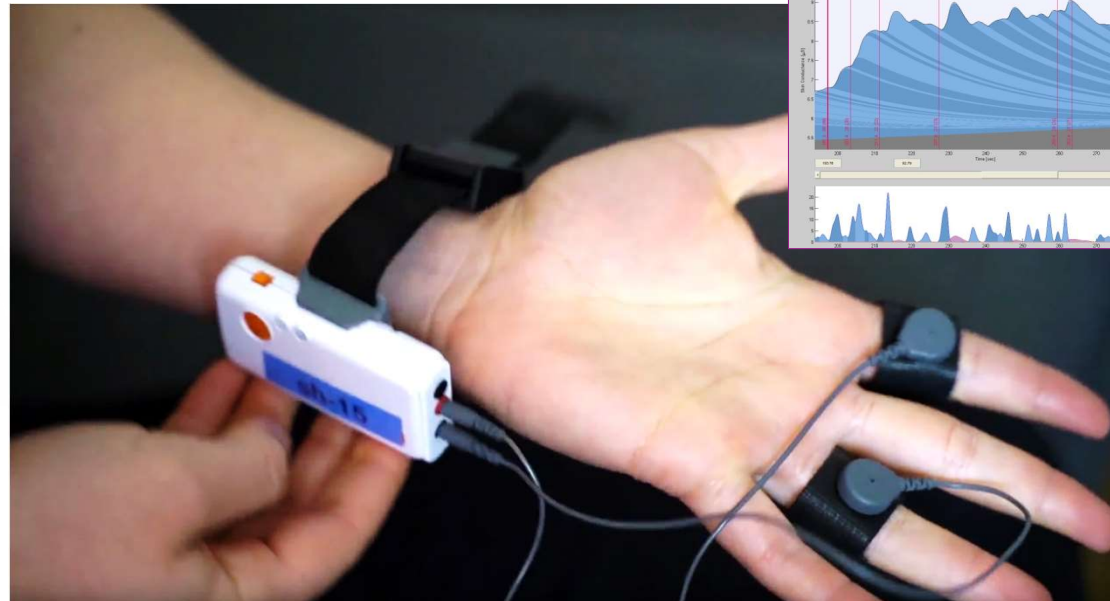
Advertising impact

A combination of classic and innovative survey methods
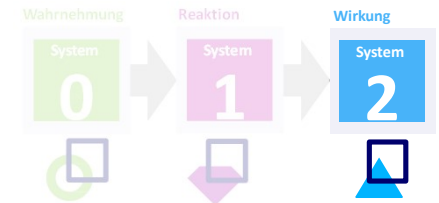
Online questionnaire:

- Advertising recall
- Open question about spot details
- Purchase intention
- Apps used during second-screen use
- Evaluation of media environments

eye square
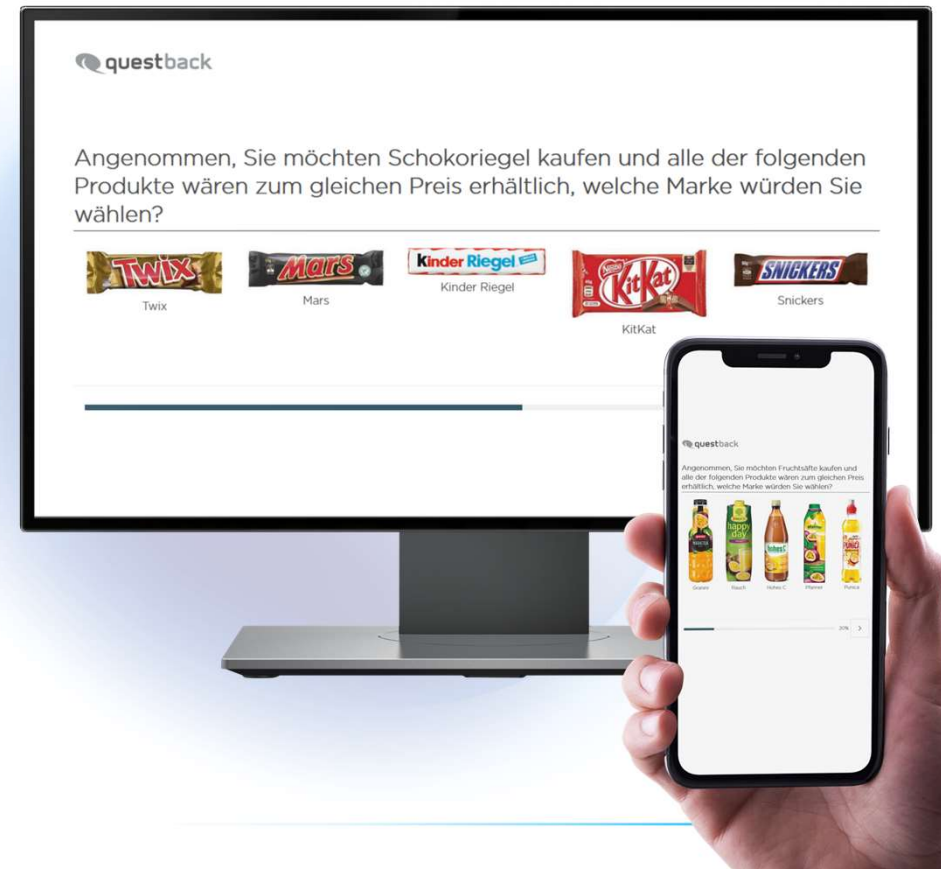
Home-Kit Technology

All equipment can be self-assembled by the participants

Laptop

Smartphone

Sämtliche Technik kompakt in einer Box

Webcam

Hautmessgerät

02 Advertising impact

eye
square

TV ads are best remembered spontaneously

Free ad recall

52%	**44%**	**34%**	**30%**
TV	BVOD	YouTube (non skip)	Facebook

Control Group

13%

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

eye square
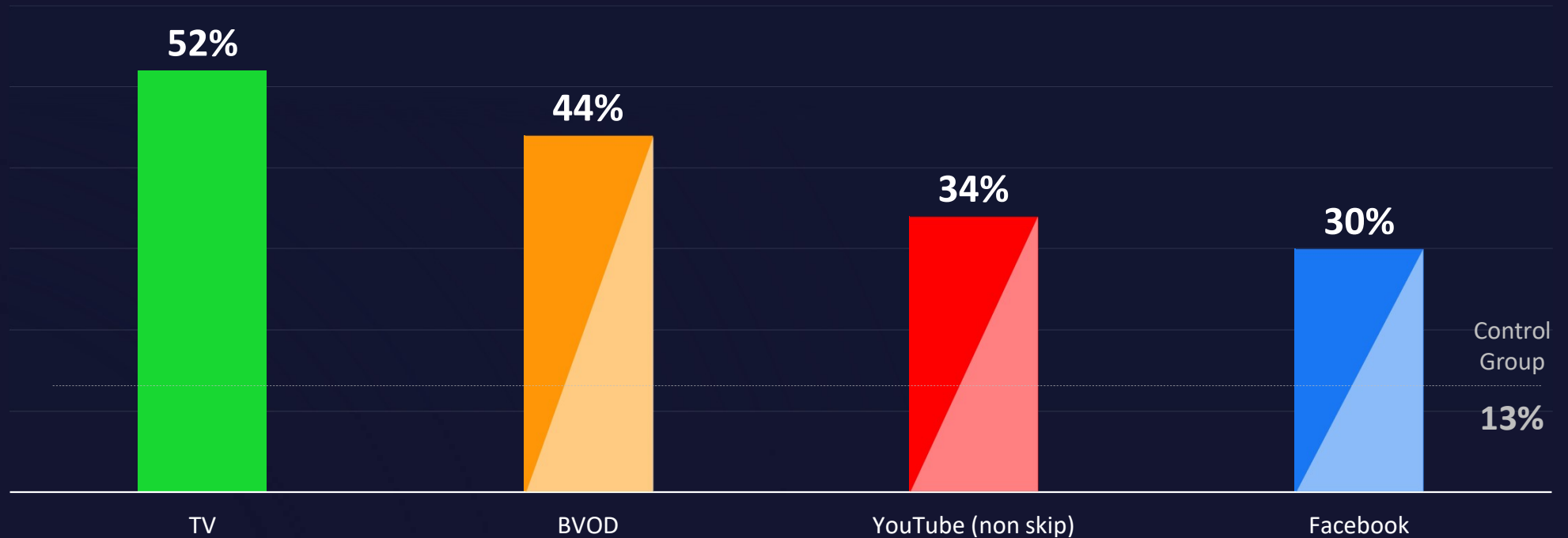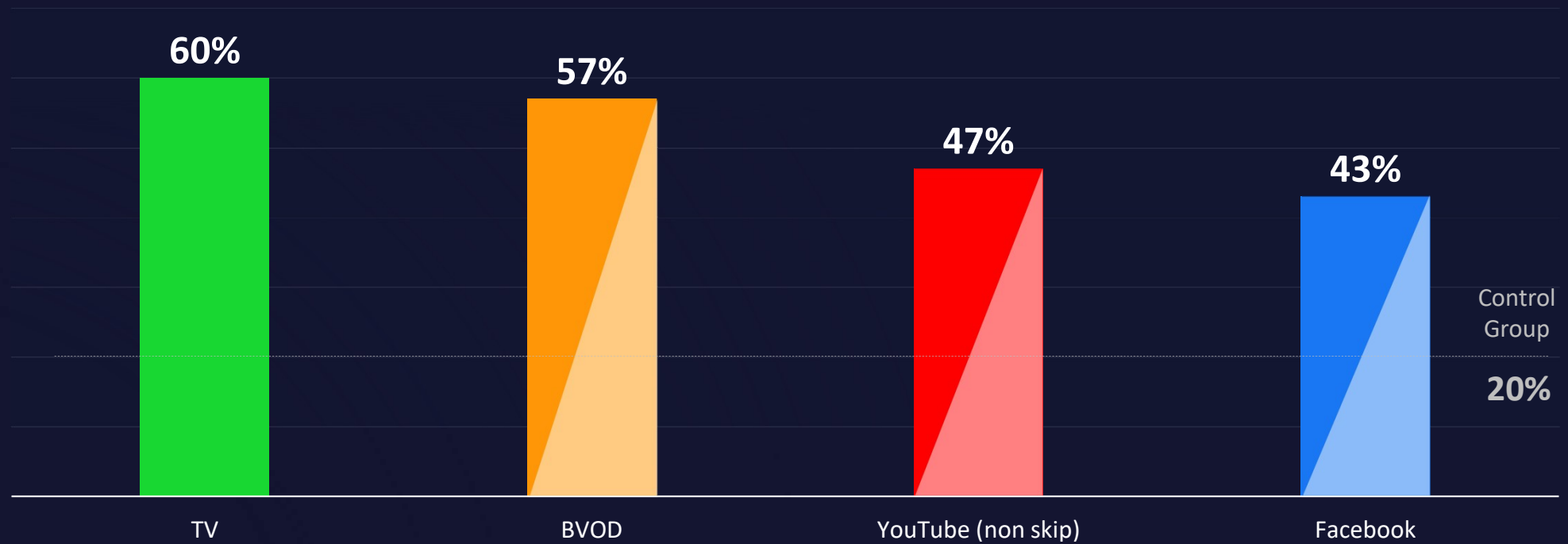
TV & BVOD even in terms of purchase intention

Purchase intention

26% — TV

26% — BVOD

23% — YouTube (non skip)

20% — Facebook

Control Group
13%

TV BVOD YouTube (non skip) Facebook

Question: „Suppose you wanted to buy [a product category] and all of the following products were available at the same price, which brand would you choose?" Number of ad contacts: N (TV) = 424, N (BVOD; TV and Smartphone) = 971, N (YouTube; TV and Smartphone) = 1027, N (Facebook; arithmetic mean of optimized and standard spots) = 515, N (Control group) = 436.

03 Perception

Ads on Facebook mostly muted

Proportion of ad contacts played back with sound and in full screen

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

	Sound on	Muted	Fullscreen	Not Fullscreen
TV	100%	0%	100%	0%
BVOD	100%	0%	100%	0%
YouTube (non skip)	100%	0%	59%	41%
Facebook	34%	66%	16%	84%

eye square

Technical delivery of ad contacts: proportion of ad contacts with sound on/off and replay in fullscreen/not fullscreen. Number of ad contacts: N (TV) = 476, N (BVOD; TV and Smartphone) = 804, N (YouTube; TV and Smartphone) = 774, N (Facebook; arithmetic mean of optimized and standard spots) = 380.

Attention to screen

Results of visual attention based on the viewers orientation towards the screen

An algorithm detects whether the subject's face is visible from the front when looking at the TV (camera 1) or smartphone (camera 2).

In this case, it's assumed that the tester is looking at the respective screen and this is interpreted as looking at the screen.

This method is different to classical eye tracking and delivers different results.

Analysis of head rotation and frontal alignment for attention to screen detection
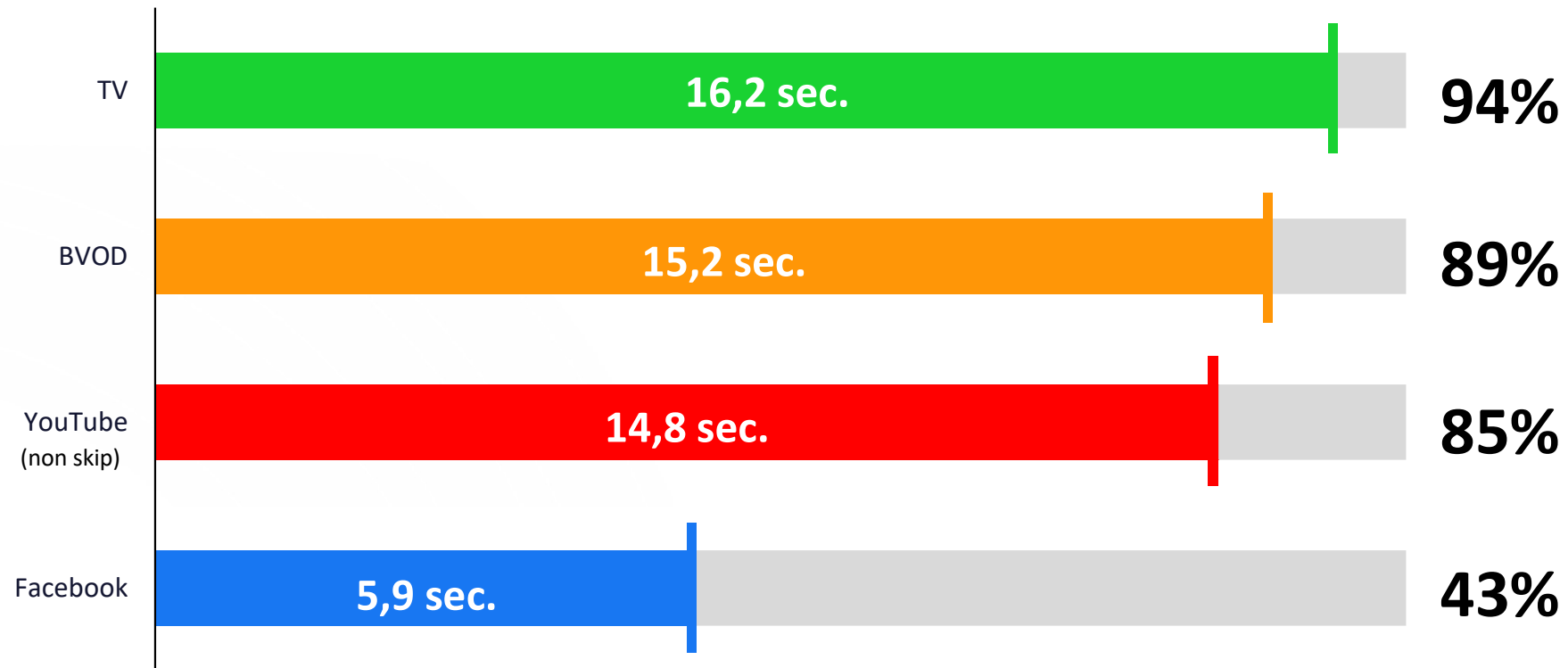
Screen coverage on TV sets

Coverage: Proportion of the full screen area covered by the advertising displayed
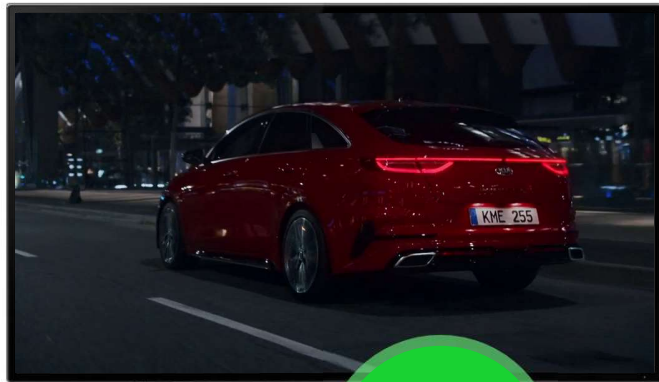
100%
TV

100%
BVOD

100%
YouTube

...but what does advertising look like on mobile devices?

Screen coverage on smartphones

Coverage: Percentage of the full screen area covered by the advertising displayed

100%
BVOD

25%
YouTube

47%
Facebook

Percentage of the full screen area covered by the advertising displayed (in %). Number of ad contacts: N (BOVD) = 336, N (YouTube) = 348, N (Facebook; arithmetic mean of optimized and standard spots) = 380.
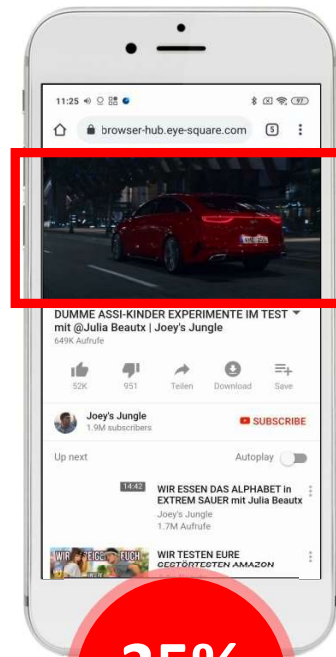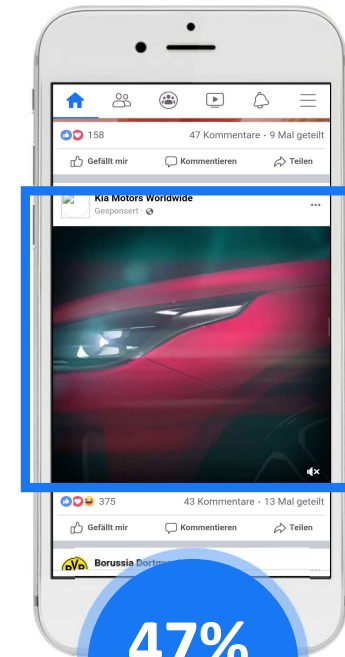
Ad Perception Rate on Facebook

Attention to screen
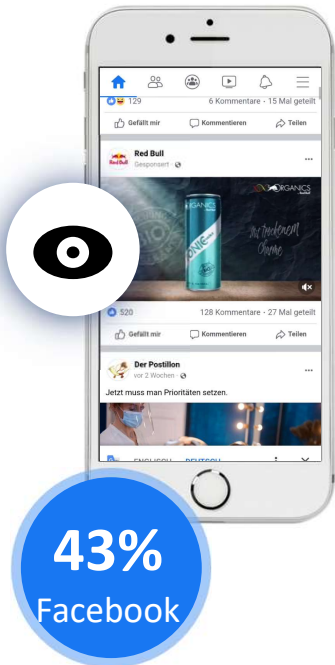
Screen coverage

Ad Perception Rate

43%
Facebook

X

47%
Facebook

=

20%
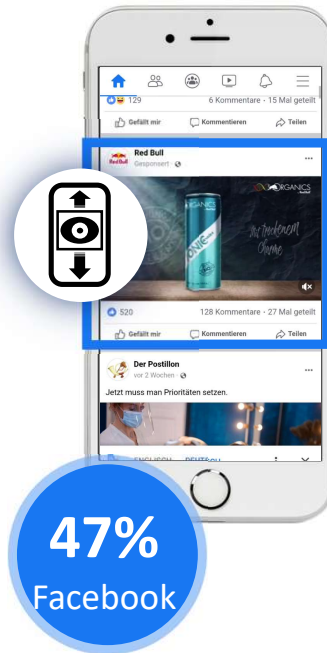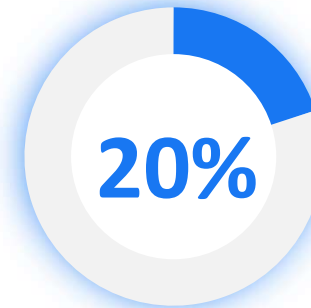
1. 43% of the spot length is devoted to the (entire) screen.
2. The ad covers 47% of the screen.
3. The result is an Ad Perception Rate of 20%.

Low perception of Facebook ads

Ad Perception Rate: Attention to screen times screen coverage

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

94%

TV

16,2 sec.

89%

BVOD

15,2 sec.

58%

YouTube
(non skip)

10,3 sec.

20%

Facebook

2,8 sec.

eye square

Ad Perception Chance: arithmetic mean of total attention to screen during ad contact on media platforms in proportion to average length of commercials on platforms (in %) multiplied with proportion of the full screen area covered by the advertising displayed (in %). Number of ad contacts: N (TV) = 476, N (BVOD; arithmetic mean of TV and Smartphone) = 804, N (YouTube; arithmetic mean of TV and Smartphone; 100% Non-Skippable) = 774, N (Facebook; arithmetic mean of optimized and standard spots) = 380.

Making the emotional impact measurable

The automatic analysis of facial key points by means of webcam and software.

- Through an algorithm, six basic emotions are identified and quantified in participants' facial expressions

- These emotional responses are compared across environments, test groups, and advertising contacts
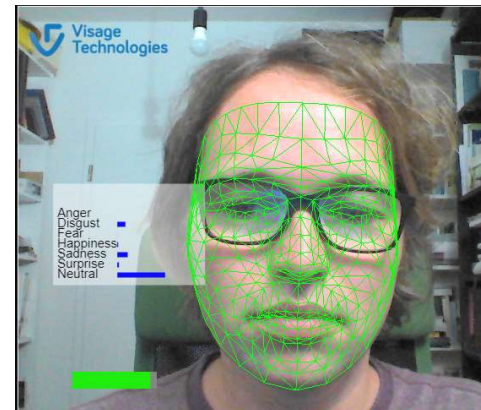
neutral reaction
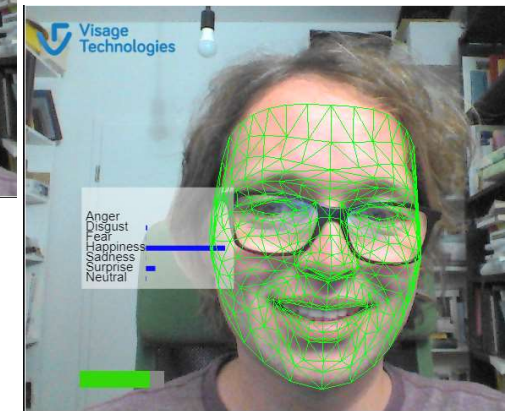
strong happiness

TV stimulates positive emotions the longest

Positive emotionalization while paying attention to advertising

5,1 sec.	4,9 sec.	4,4 sec.	1,2 sec.
TV	BVOD	YouTube (non skip)	Facebook

Highest excitement on YouTube and BVOD

Activation (peaks/minute) during advertising

3,78
TV

4,00
Facebook

4,55
BVOD

5,69
YouTube
(non skip)

Relaxation ⟵ ⟶ Tension

Activation response: Average number of peaks per minute during ad contact on media platforms. Number of ad contacts: N (TV) = 384 N (BVOD; arithmetic mean of TV and Smartphone) = 678, N (YouTube; arithmetic mean of TV and Smartphone; 100% Non-Skippable) = 617, N (Facebook; arithmetic mean of optimized and standard spots) = 301.

TV: Change to advertising smallest

Change in activation (peaks/minute) from content to advertising
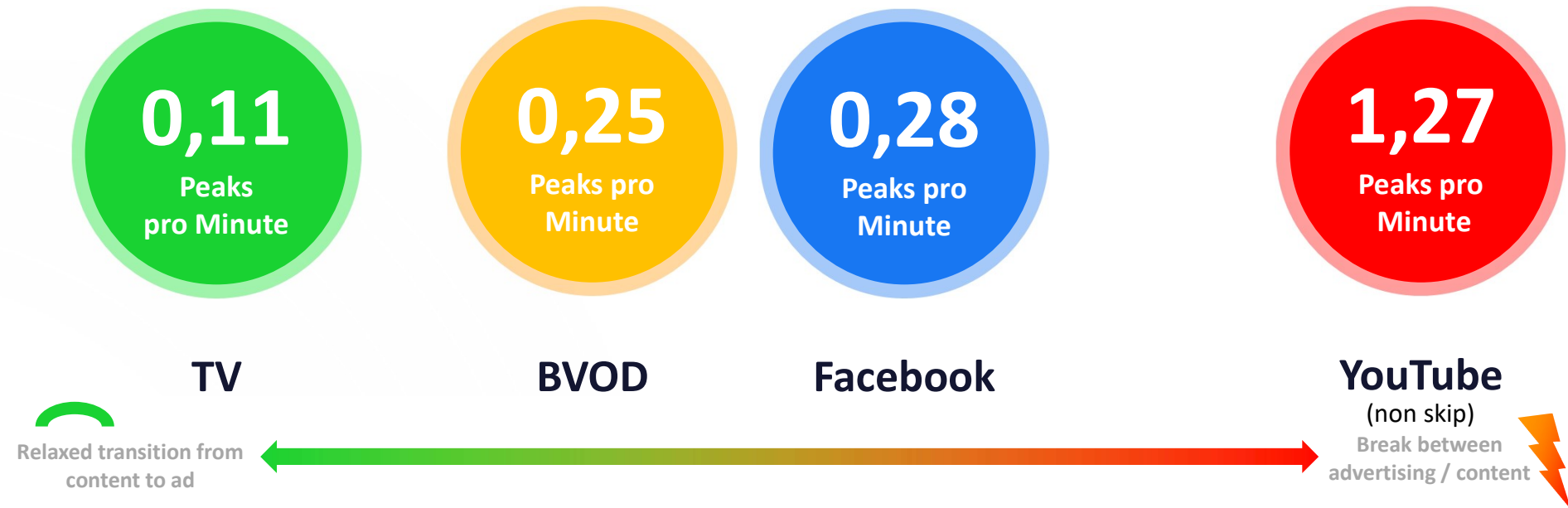
SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

0,11
Peaks pro Minute

TV

0,25
Peaks pro Minute

BVOD

0,28
Peaks pro Minute

Facebook

1,27
Peaks pro Minute

YouTube
(non skip)

Relaxed transition from content to ad

Break between advertising / content

Activation response: Average number of peaks per minute during ad contact on media platforms. Comparison between content and advertising. Ad contacts: N (TV) = 384 N (BVOD; arithmetic mean of TV und Smartphone) = 678, N (YouTube; arithmetic mean of TV and Smartphone = 617, N (Facebook; arithmetic mean of optimized and standard spots) = 301. Content: N (TV) = 97, N (BVOD; arithmetic mean of TV and Smartphone) = 235, N (YouTube; arithmetic mean of TV and Smartphone) = 179, N (Facebook) = 118.

Classic TV as a relaxing medium

Basic activation level across all four usage settings.

TV
Relax with content and advertising

YouTube
Advertising gets in the way of relaxation

BVOD
Television mood despite selection

Facebook
Surf through the Facebook feed

05 Special Analysis Devices

Usage patterns: TV vs smartphone

Where does advertising work better?
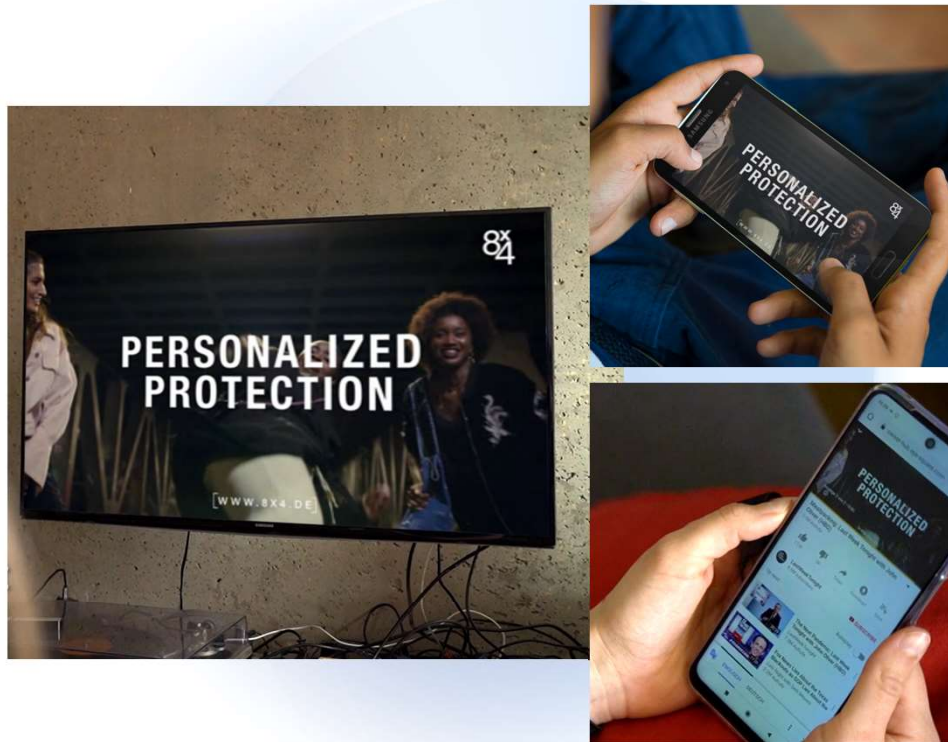
So far:

- Comparison of small and big screens

Next up:

- Direct comparison of TV and smartphone.

- Investigated with **BVOD** and **YouTube** (content the same)

BVOD shows lower loss of effectiveness

Aided ad recall

BVOD TV	BVOD Smartphone	YouTube TV (non skip)	YouTube Smartphone (non skip)
58%	55%	57%	37%
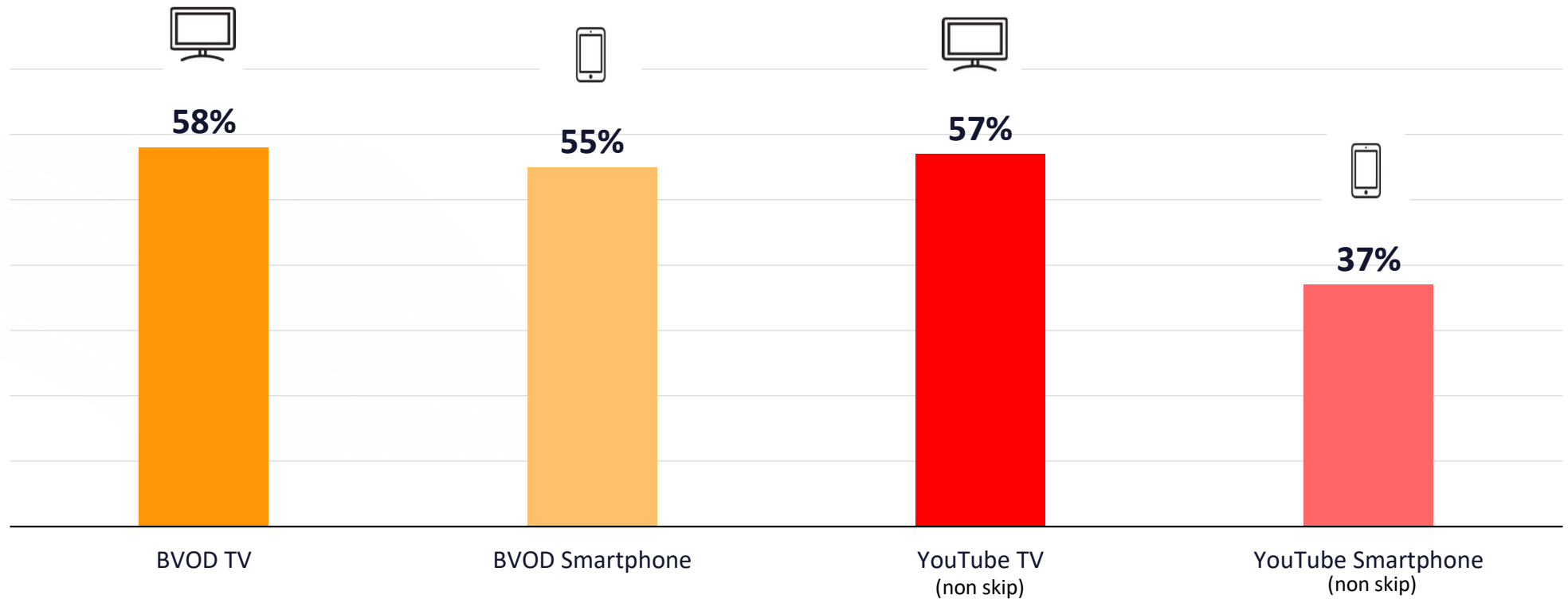
Differences in media screen coverage

Full screen coverage during advertising (in % of ad contacts)

100%
Full screen coverage
**BVOD
TV**

100%
Full screen coverage
**YouTube
TV**

100%
Full screen coverage
**BVOD
Smartphone**

8%
Full screen coverage
**YouTube
Smartphone**

Screen coverage on smartphones

Coverage: Percentage of full screen area covered by the advertising displayed

100% BVOD

25% YouTube

Coverage: Share of the full screen area covered by the advertising displayed (in %). Number of ad contacts: N (BOVD) = 336, N (YouTube) = 348.
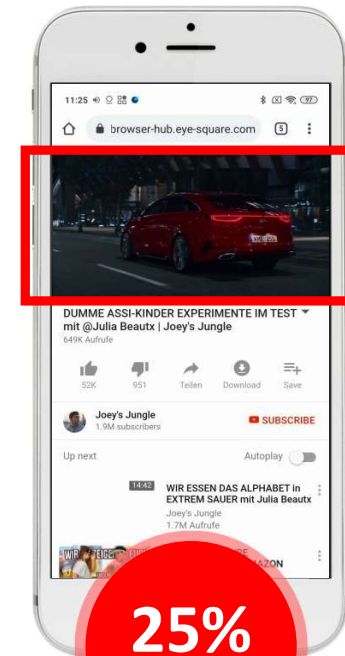
YouTube is losing on smartphones

Ad Perception Chance: Attention to screen times screen coverage

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

93%

BVOD TV

82%

BVOD Smartphone

92%

YouTube TV
(non skip)

24%

YouTube Smartphone
(non skip)

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Ad Perception Chance: arithmetic mean of total attention to screen during ad contact on media platforms in proportion to average length of commercials on platforms (in %) multiplied with proportion of the full screen area covered by the advertising displayed (in %). Number of ad contacts: N (BVOD TV) = 468, N (BVOD Smartphone) = 336, N (YouTube TV; 100% Non-Skippable) = 426, N (YouTube Smartphone; 100% Non-Skippable) = 348.

Content-Ad Comparison: Overall Emotions

Overall emotionalization of content and advertising

BVOD TV
- Content: 38%
- Ads: 36%

BVOD Smartphone
- Content: 39%
- Ads: 33%

YouTube TV (non skip)
- Content: 35%
- Ads: 36%

YouTube Smartphone (non skip)
- Content: 36%
- Werbung: 24%

Overall emotionalization: Share of emotionalization in %; Comparison between content and advertising. Number of ad contacts: N (BVOD TV) = 468, N (BVOD Smartphone) = 336, N (YouTube TV) = 426, N (YouTube Smartphone) = 348. Content: N (BVOD TV) = 175, N (BVOD Smartphone) = 99, N (YouTube TV) = 118, N (YouTube Smartphone) = 107.

06

Special Analysis
Skippable vs. Non Skippable Ads on YouTube

eye
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The study

The effects of skippable and non-skippable video ads on YouTube have to be researched as well. The participants use YouTube, either on their desktop or smartphone, and collect advertising contacts that are skippable or non-skippable. They are then surveyed.

- N=854 participants
- 8 different commercials (from the main study)
- Desktop vs. Mobile / Skip vs. non skip PreRoll
- Behavioural data (skipping percentage, duration of advertising)
- KPIs: recall performance and purchase intention

Skippable ads reduce advertising impact

If less of the spots are seen, they cannot unfold their effect.

	YouTube Desktop Effect discount	YouTube Smartphone Effect discount	Effect discount overall
Free ad recall	**-16%**	**-26%**	**-21%**
Aided ad recall	**-20%**	**-19%**	**-20%**
Purchase intention	**-4%**	**-6%**	**-5%**

- As soon as YouTube advertising becomes skippable, the advertising impact drops across all KPIs
- At the same time, the impact discount on smartphones is usually higher - especially for unaided KPIs.
- The influence of advertising diminishes as the marketing funnel progresses.

Number of advertising contacts: N (YouTube; mean of desktop and smartphone; non-skip) = 854, N (YouTube; mean of desktop and smartphone; skippable) = 854.

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THE MAGIC OF TOTAL VIDEO

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Chance to skip lowers free ad recall

Free ad recall

SCREEN FORCE
THE MAGIC OF TOTAL VIDEO

52%	44%	39%	31%	30%

-8
Percentage points

Control group

13%

TV · BVOD · YouTube non-skip · YouTube skippable · Facebook

eye square

Question: "From which brands [of a certain sector] have you seen advertisements for recently?" Number of ad contacts: N (TV) = 448, N (BVOD; mean of desktop and smartphone) = 1003, N (YouTube; mean of desktop and smartphone; non-skip) = 854, N (YouTube; mean of TV and smartphone; skippable) = 854, N (Facebook; mean of optimized and standard spots) = 523, N (control group) = 444.

Skipping rather the rule than the exception

Skipping behavior of users (total and per device) in % and sec.

75% skip

59% skip

66% skip

34% do not skip
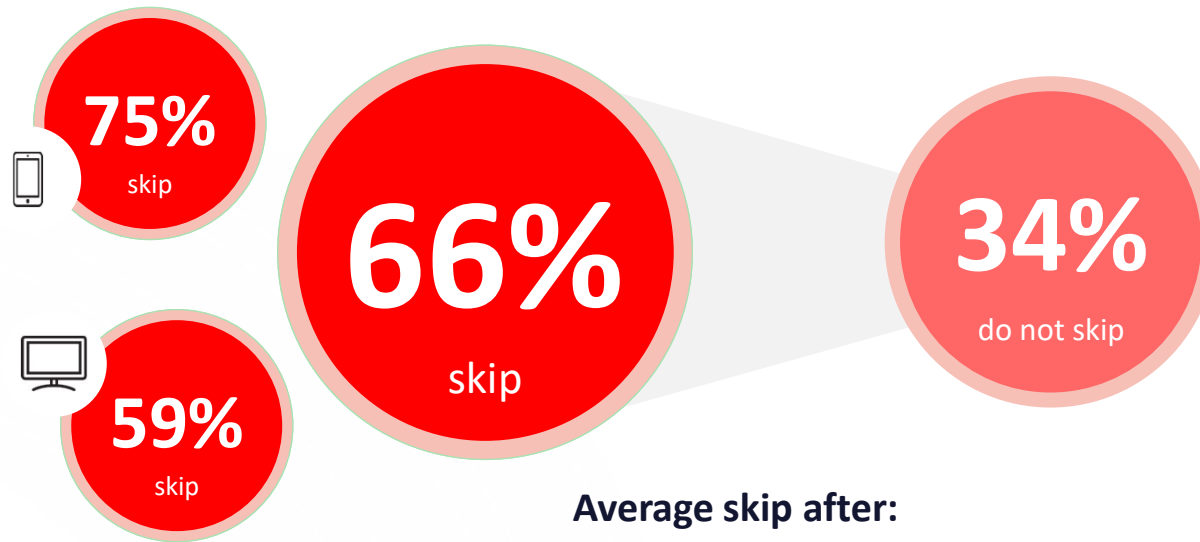
Average skip after:

7.8 sec.

(Skipping is only possible after 5 seconds)

- When advertising is skippable on YouTube, 66% of users make use of it.
- Skipping depends on the device: On the smartphone, as many as three quarters of all users skip.
- If a commercial is skipped, it happens after an average of 7.8 seconds.
- Since the skip button only appears after the first 5 seconds, this value shows that the vast majority skips as quickly as possible (only 2.8 seconds longer than technically possible at all).

High variance within the ad campaigns

Ranks of spot-discounts demonstrate high influence of creation

Free ad recall:

| -9% Best Spot | -21% Average | -41% Worst Spot |

Aided ad recall:

| -6% Best Spot | -20% Average | -47% Worst Spot |

Purchase intention:

| -5% Best Spot | -5% Average | -20% Worst Spot |
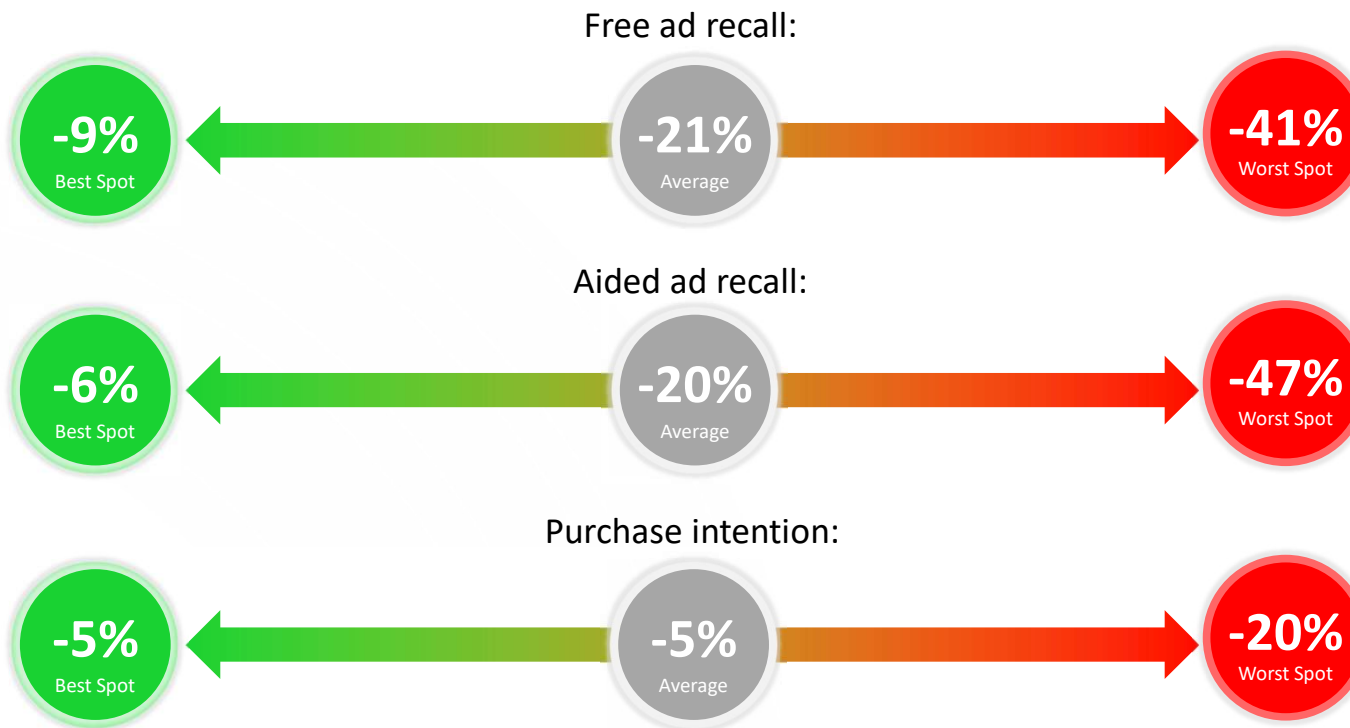
- Creation has an obvious effect whether ads are continued and for how long despite the skip option; quality can cushion the blow.
- Very good spots have lower impact losses, while bad spots can lose almost half their impact if they can be skipped.
- However, the introduction of the skip option leads to a drop in relevant effect parameters for all creations.

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THE MAGIC OF TOTAL VIDEO

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Participants = 854. Number of advertising contacts per brand between 315 (min) and 327 (max).

07 Outline and Key Takeaways

Contact quality accounts for advertising potential

|	Settings		Perception opportunity			Reaction		Acceptance	Advertising potential			
TV	1	1	1	1	1	2	1	1	1	1	2	1
BVOD	1	1	2	1	2	1	2	2	2	2	1	1
YouTube (non skip)	1	2	3	2	3	3	4	3	3	3	3	2
Facebook	2	3	4	3	4	4	3	4	4	4	3	3
	System 0 (Perception)					System 1 (Implicit condition)			System 2 (explicit effect)			
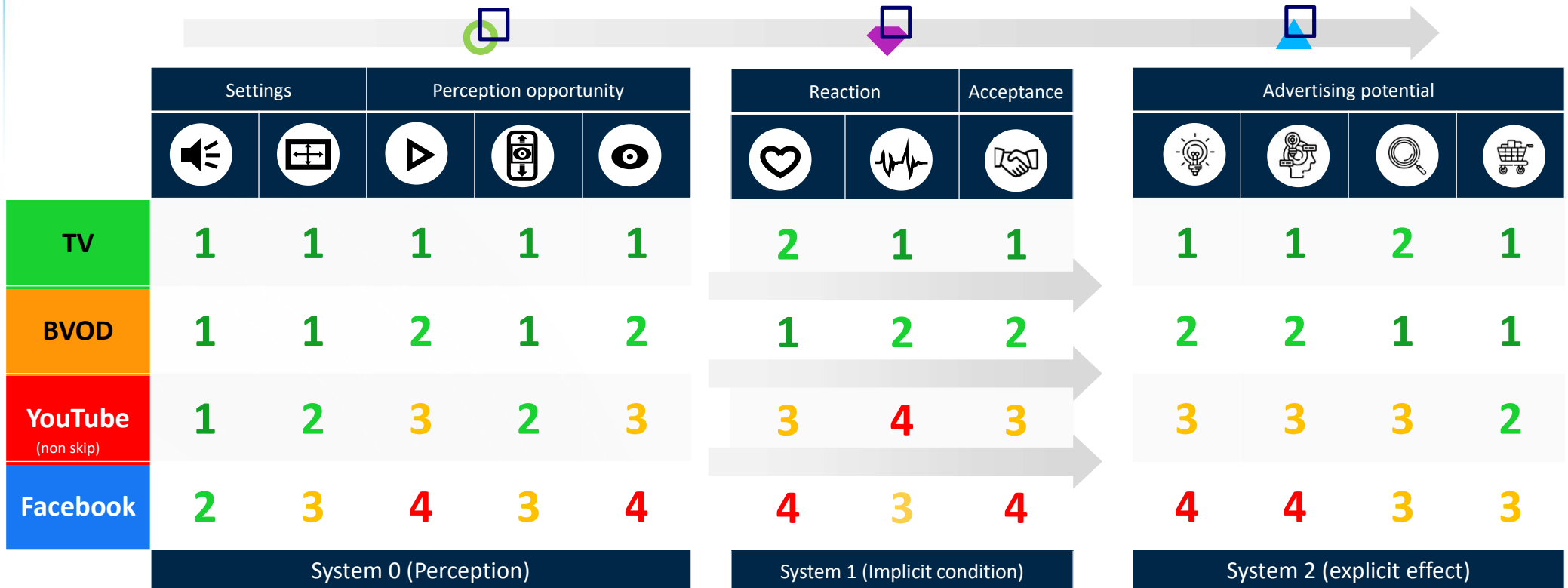
Settings: 1. With sound 2. Full screen ; Perception opportunity: 3. Visibility duration 4. Full screen coverage of advertising 5. Attention to Screen (Eyes on Ad) ; Reaction:
6. Overall emotionalization of advertising 7. Activation of advertising (Difference btw. ad-content, the lower the better) ; Acceptance: Average of Top2-Answers to questions „[Media Platform] is trustworthy"
and „commercials are part of it" on a 5-point scale. ; Advertising potential: 9. Free ad recall 10. Aided ad recall 11. Detail remembrance 12. Purchase intention.

Further Research Topics in the Study

1. **Second Screen-Usage**

2. **Young vs. Old**

3. **OOH Usage (BVOD and YouTube)**
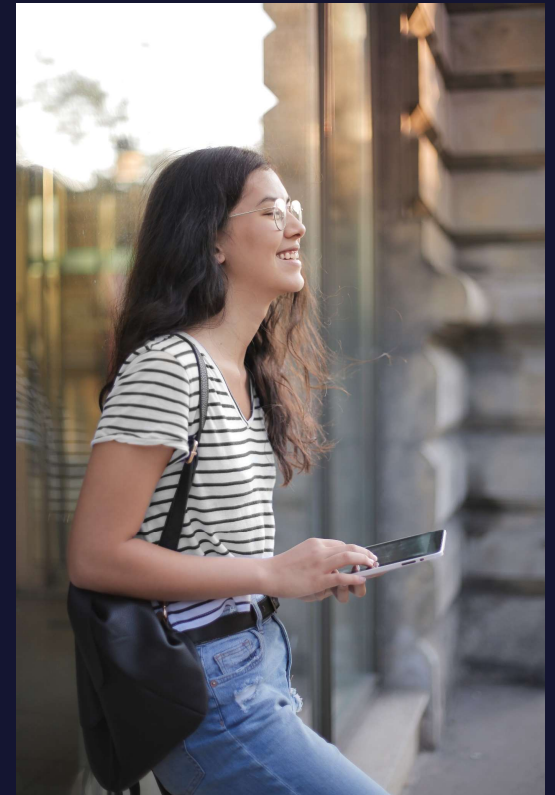
Track the Success

Thank you for your attention!

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