

SCREEN
FORCE

THE MAGIC OF TOTAL VIDEO



Into the Wild

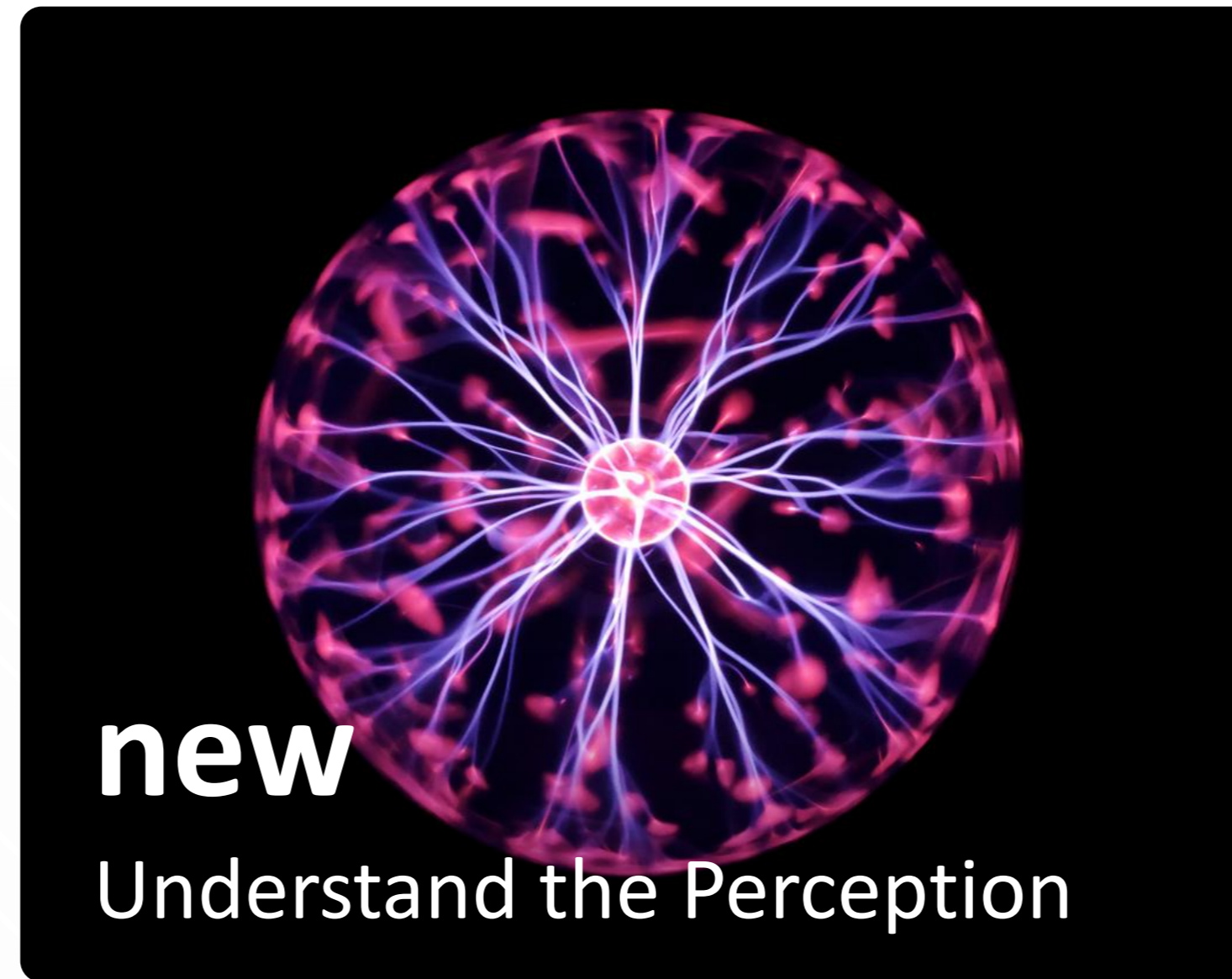
How do advertising contacts
work in the real world?

Management Summary: Into the Wild is the most realistic research

An expedition into the world of media use: real content, real advertising, real behaviour



- Completely free and genuine media usage without methodical guidelines:
- Personal feed and authentic advertising in the real world
- Holistic understanding of what happens with individual advertising contacts



- Extended and detailed analysis of attention:
- Brand elements are also perceived more intensively on TV and BVOD
- The link between viewing and memory explains the impact even more clearly



- TV and BVOD have a clear advantage in terms of impact:
- High acceptance, high-quality content, moderate advertising pressure and optimal perception conditions lead to a strong advertising experience

01

Background and Methods

Screenforce Research: The study journey continues



Track the Success

Controlled comparison
of media channels

most fair

Mapping the Moods

Deep dive into the moti-
vation behind video use

most universal

Mapping the Impact

Linking usage situations
with creations

most practical

Into the Wild

Media experience on
different channels

most realistic

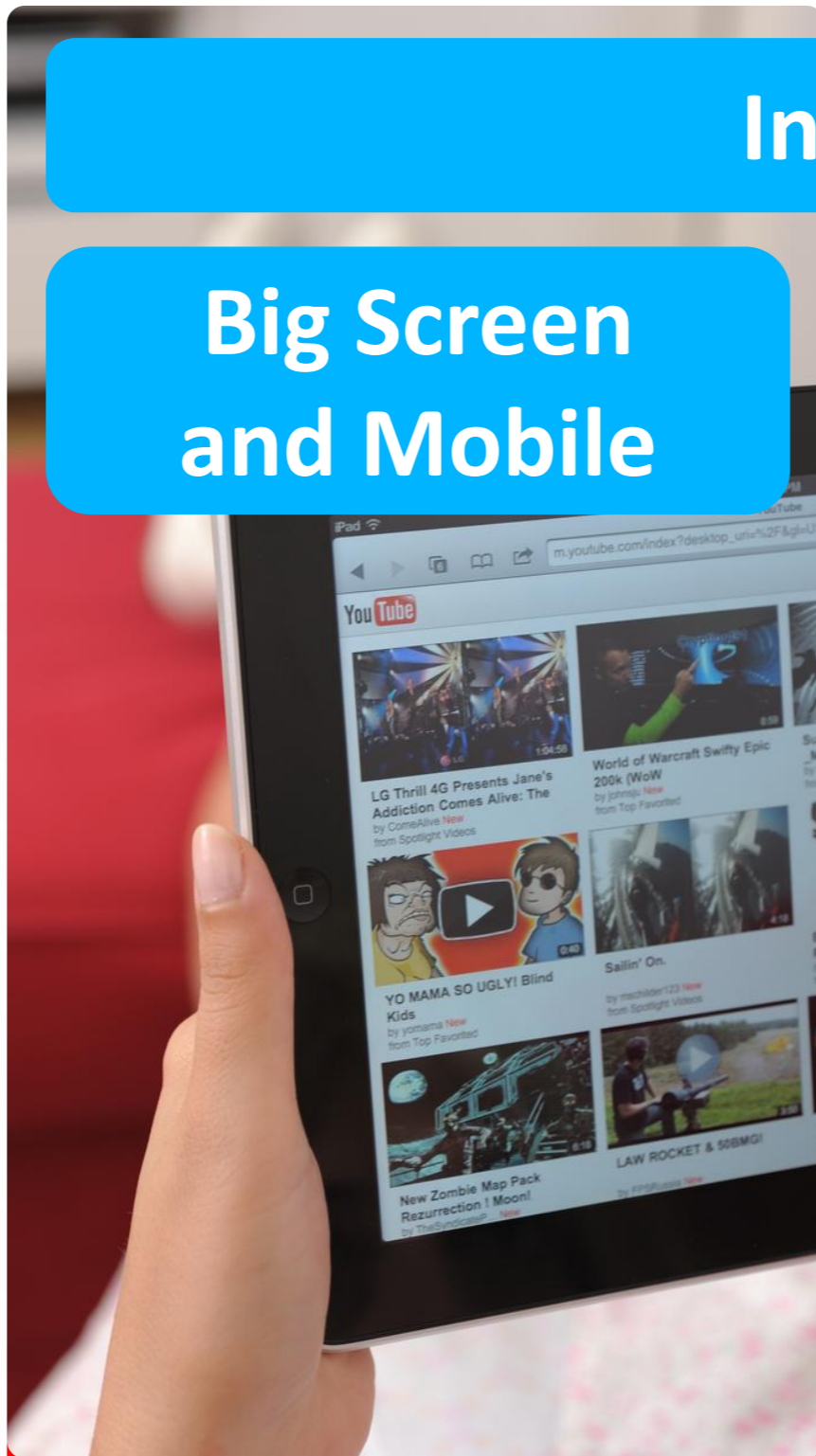
Tested media channels



TV



BVOD



Big Screen
and Mobile

YouTube



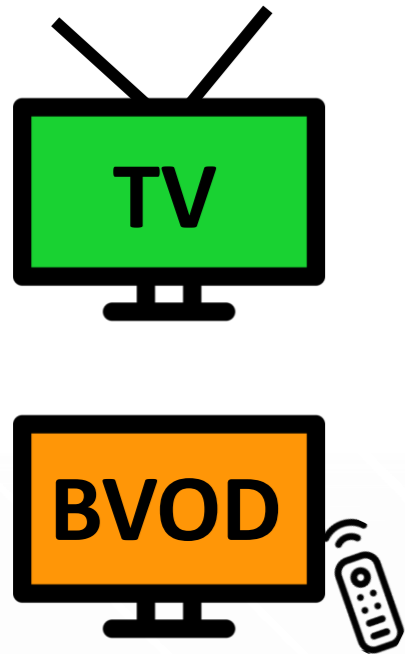
InHome and Out of Home

Instagram



TikTok

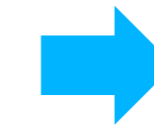
Where content and advertising meet with people



- No pre-produced TV spots
- No preselected spots
- Switch to other content at any time



- Use of the personal device and personal content from the feed
- Real advertising contacts (reel, sponsored etc.)
- Switching between the various platforms is expressly permitted
- At home or on the move



Recruitment, scheduling, dispatch
and technical setup (self-service)



Followed by a survey on memory,
ad perception and media experience

The InContext approach: testing as it really is



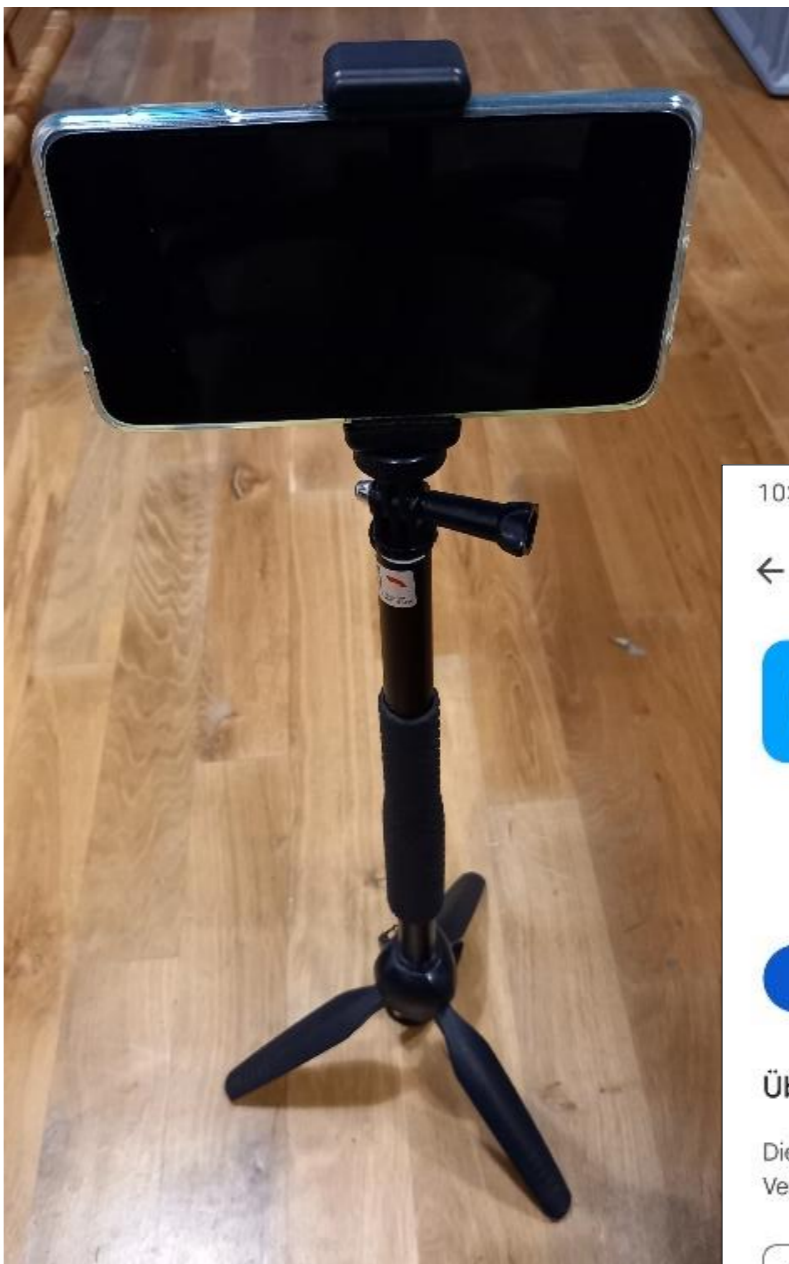
Attention

The participants' real gaze behavior was recorded using eyetracking glasses.



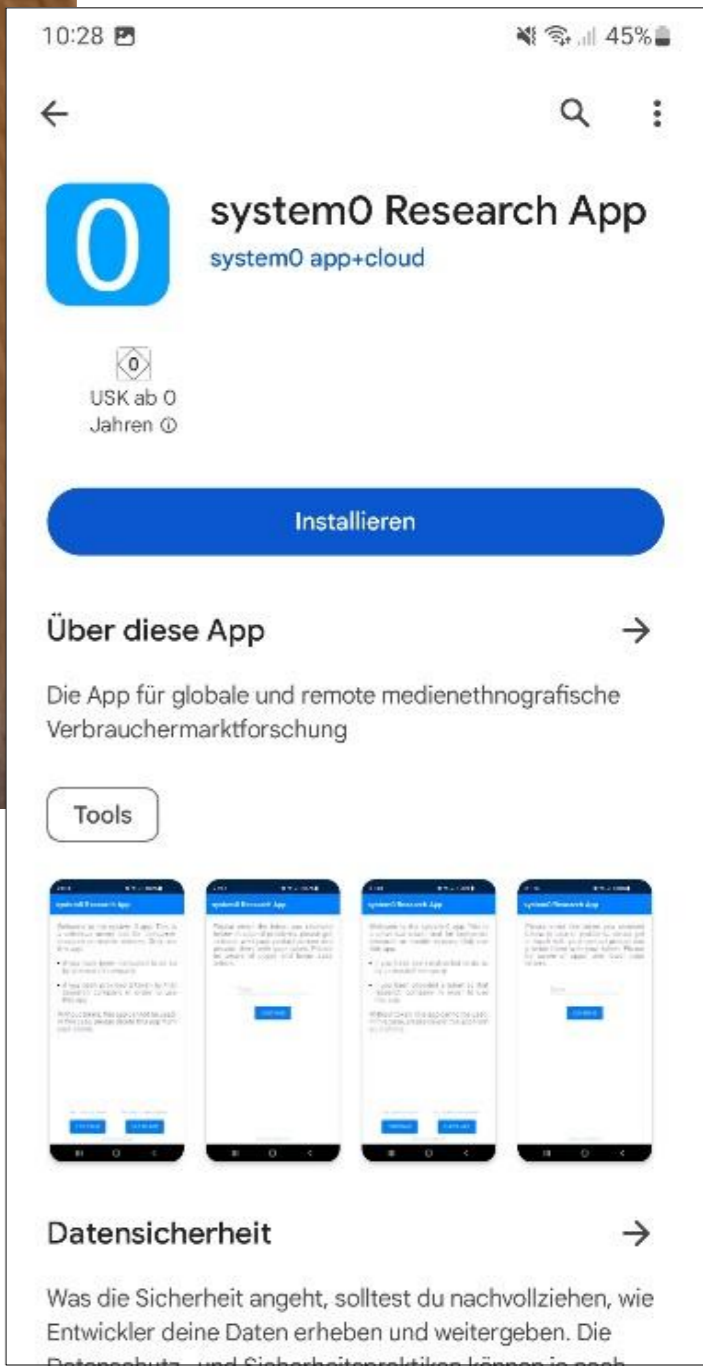
Activation:

To understand the tension/excitation, the super-light measuring device records the skin resistance.

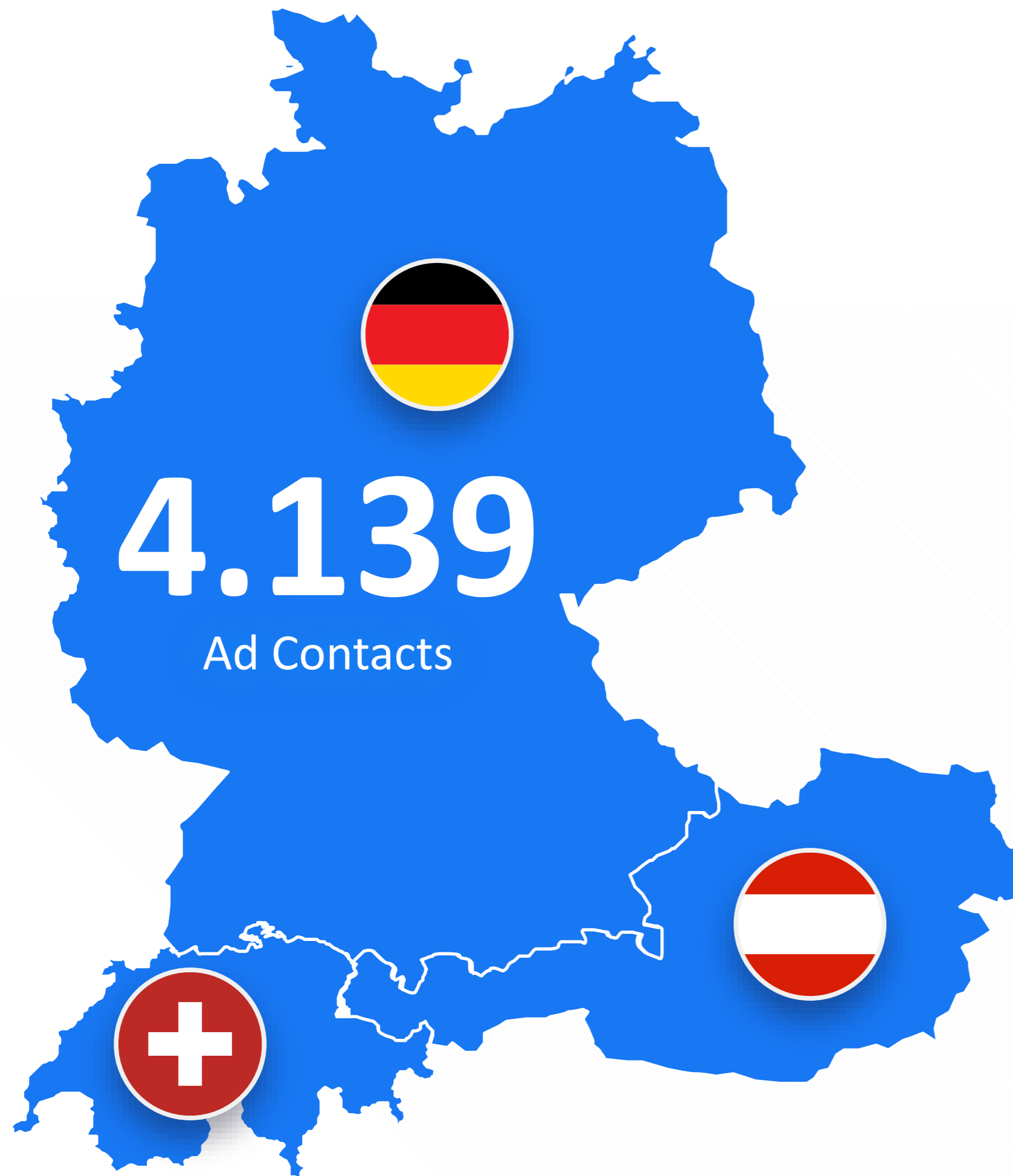


And how do we know what actually happened?

The big screen is filmed with a cell phone; the smartphone is recorded with a specially developed app.



Recruitment and sample



Requirements:

- Regular use of TV, BVOD, YouTube, Instagram and/or TikTok (depending on test group)



Demographics:

- N = 190 participants
- 50% each 18-39 and 40-59 years old
- 50% female and male



Testorte:

- Berlin, Frankfurt, Munich, Vienna, Zurich (urban+rural)
- 75% in DE, 12,5% in A, 12,5% in CH

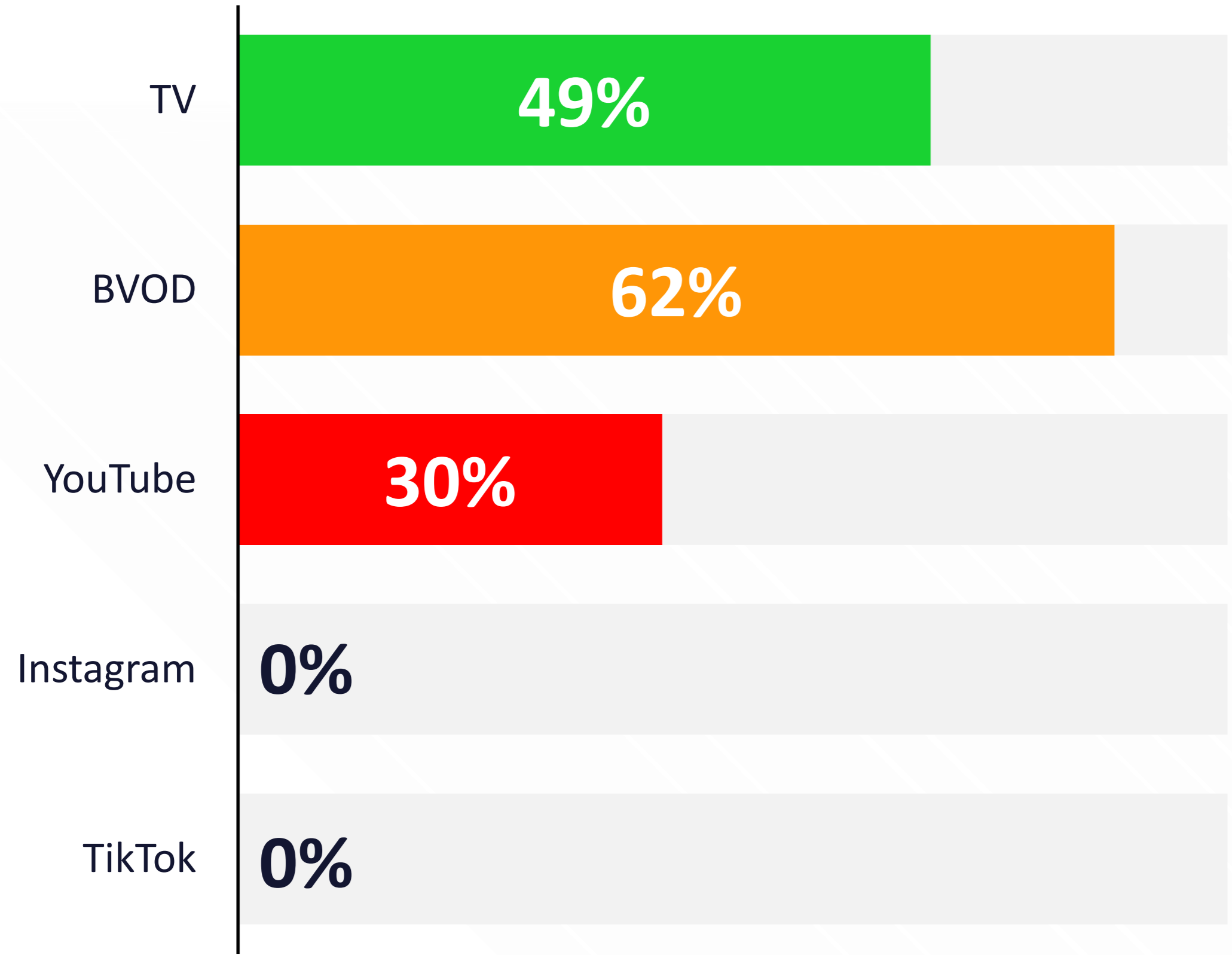
02

Media Experience

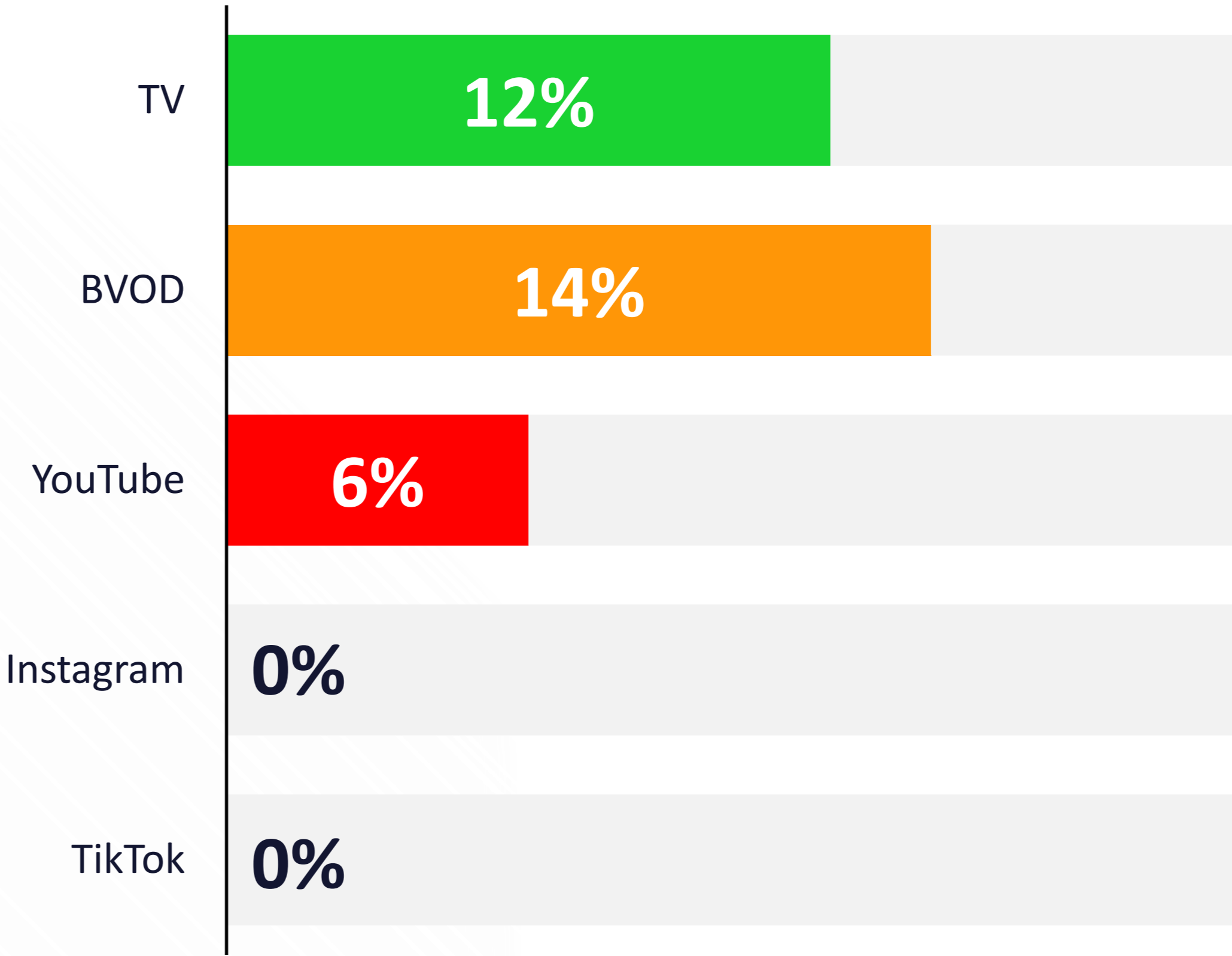
Total Video means quality time: Enjoying long content with others

Distribution of viewed content lengths and respective usage situation in %.

Primarily watch longer video content



Rather watch together with others



„Storm of images“ is particularly high on Instagram

Average number of content and advertising changes per hour and platform.



TV



BVOD



YouTube



Instagram

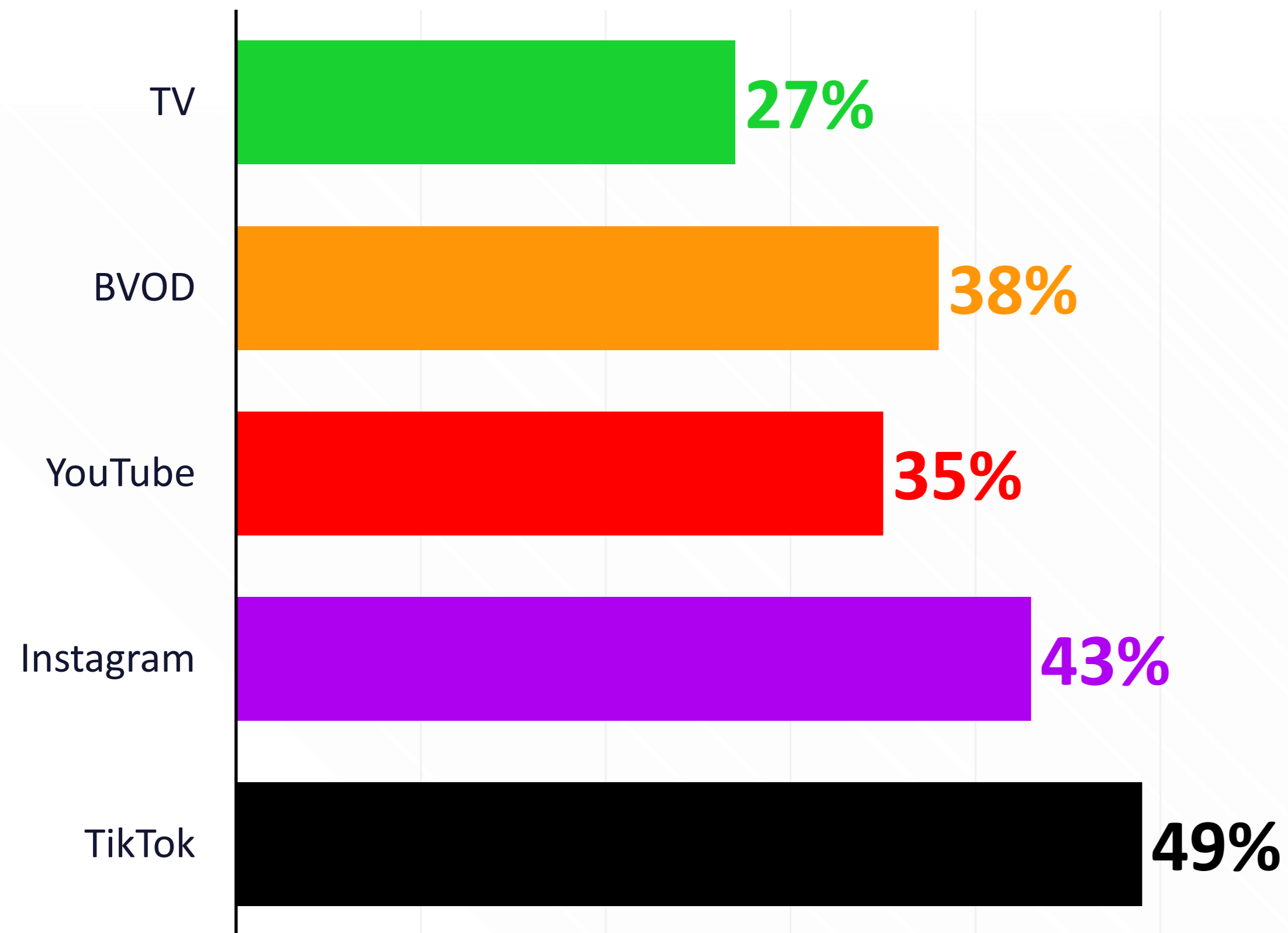


TikTok

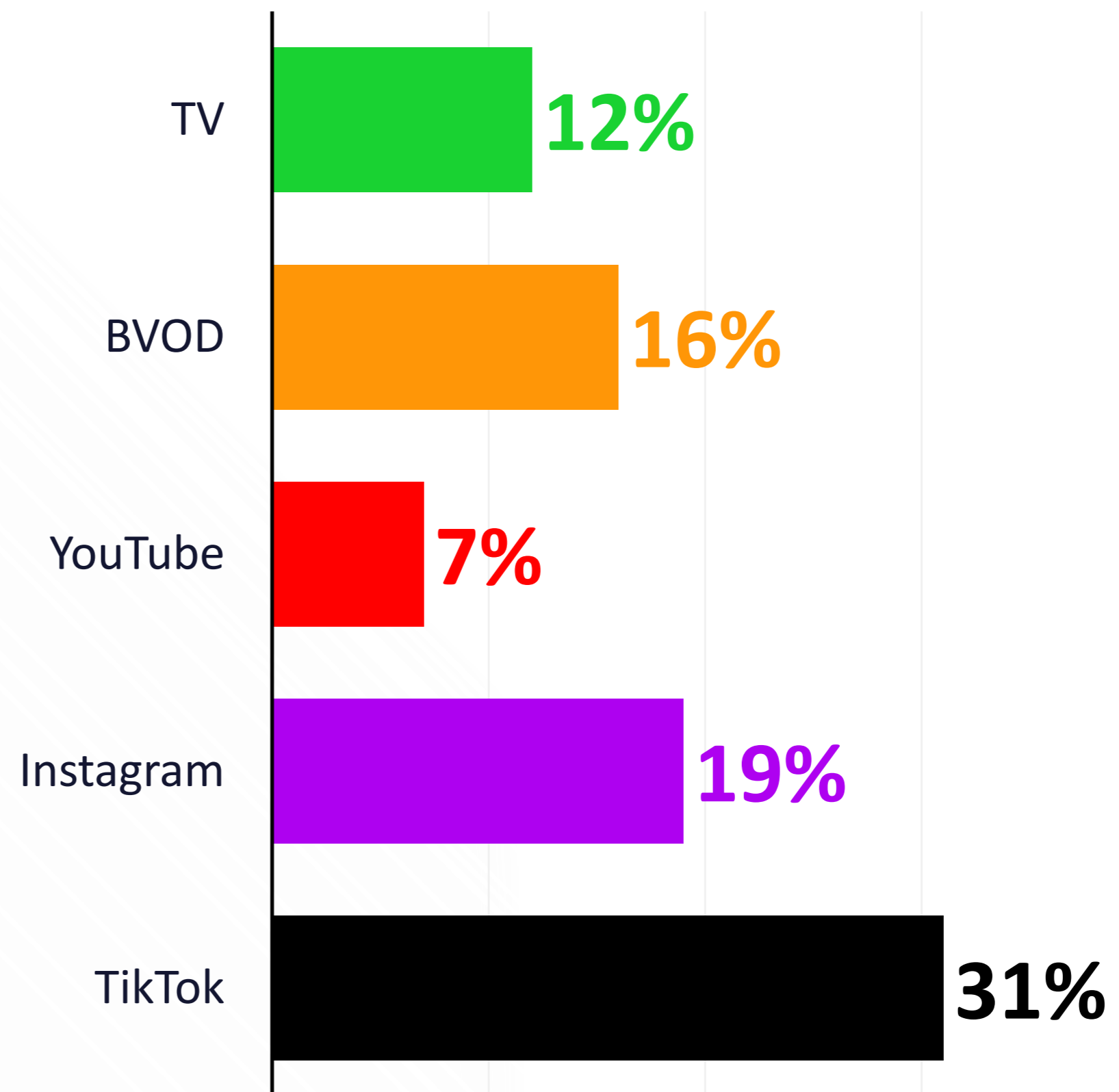
Much and fast: Short content on TikTok costs energy

Agreement with the experience of media use (top2) per platform in %.

“I sometimes feel exhausted after watching.”

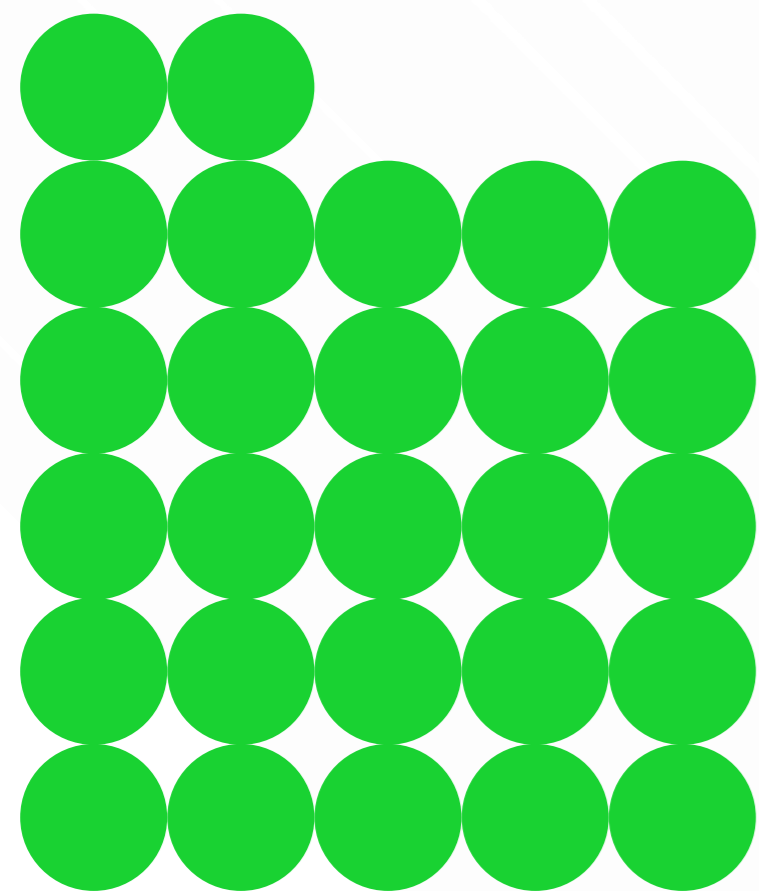


“I found the content tedious here.”



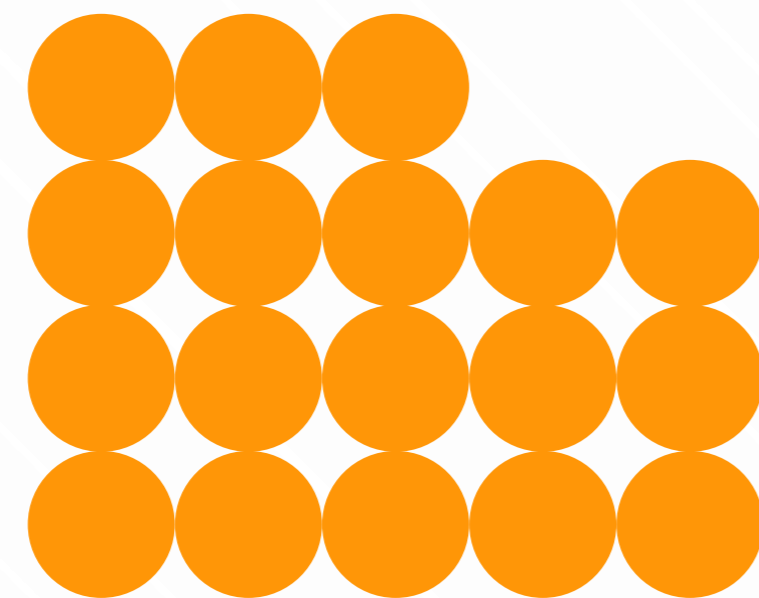
Highest advertising pressure on Instagram, TV in midfield

Ad load: Number of ads played per person and hour.



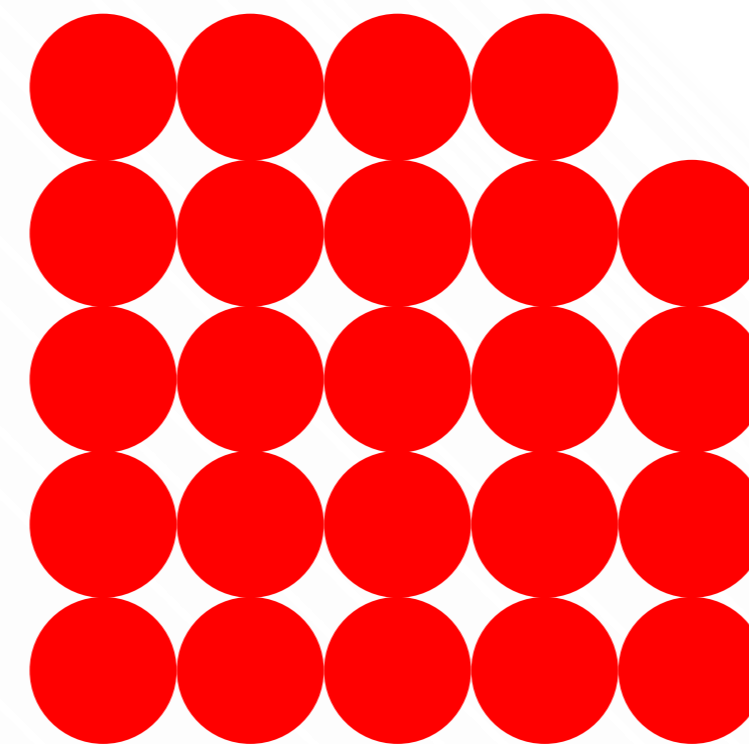
27

TV



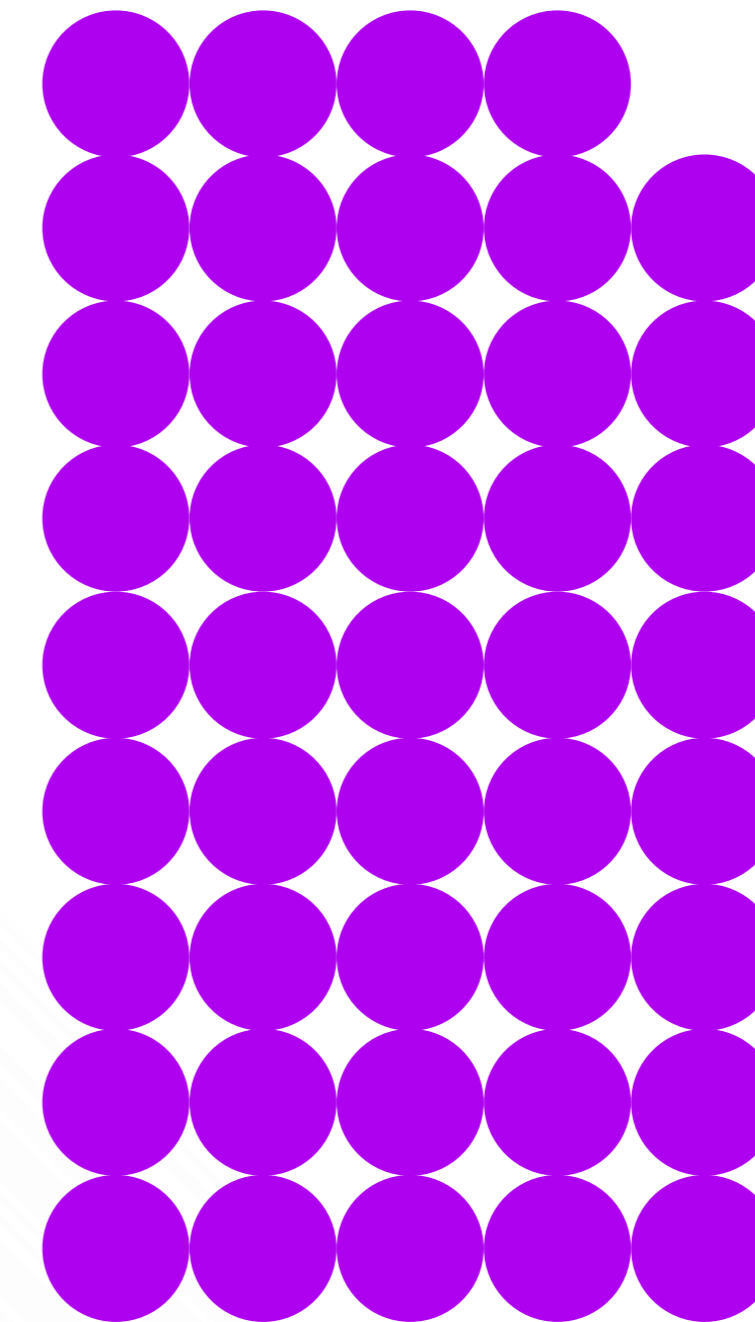
18

BVOD



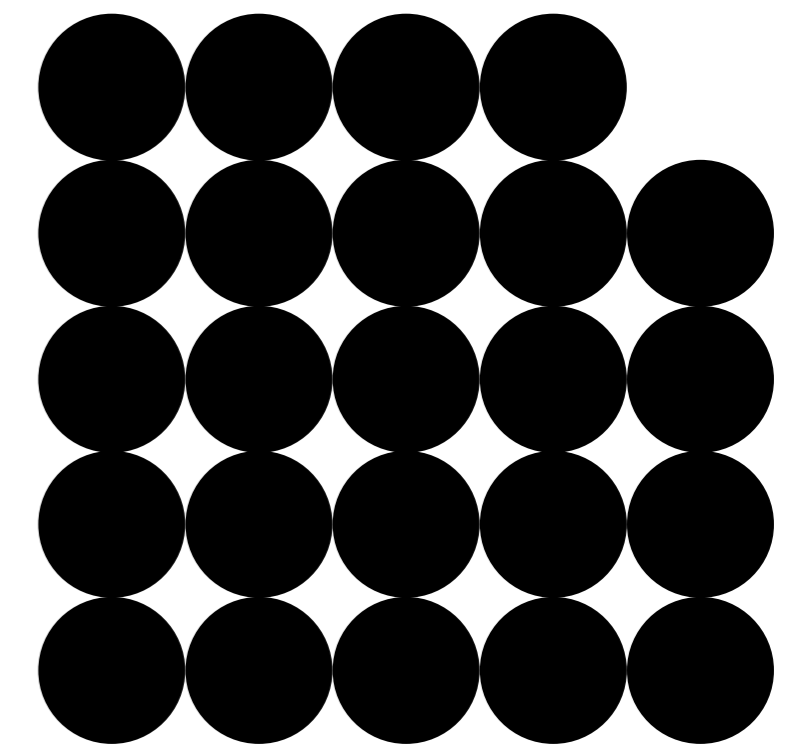
24

YouTube



44

Instagram

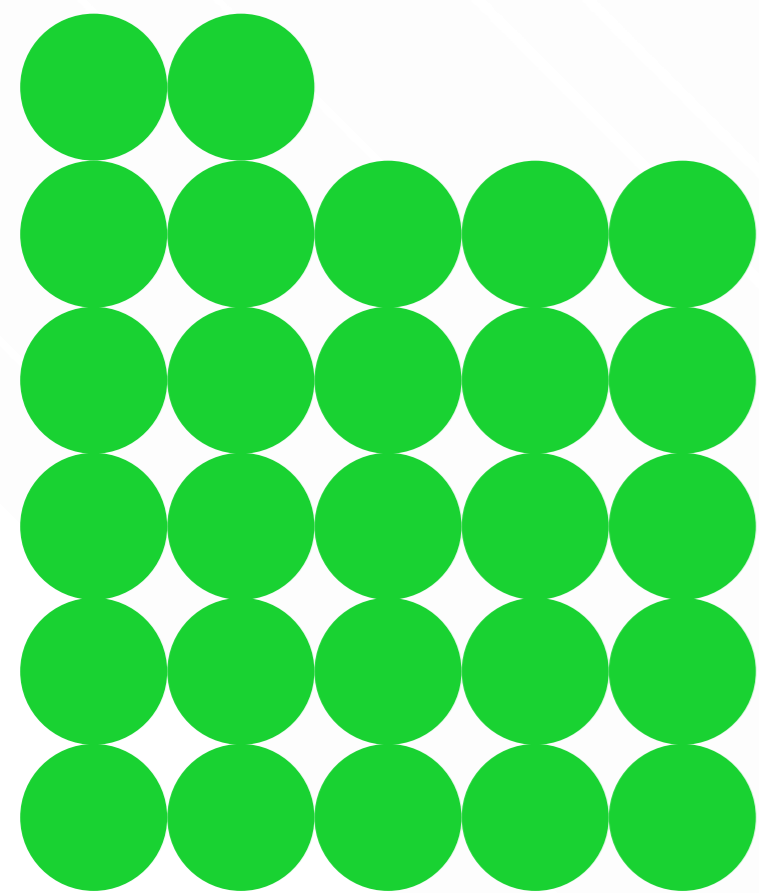


24

TikTok

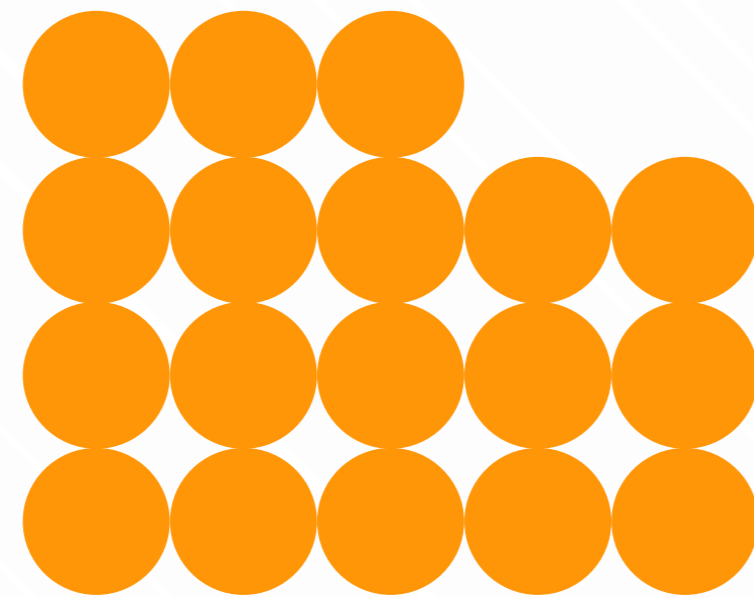
Highest advertising pressure on Instagram, TV in midfield

Ad load: Number of ads played per person and hour.



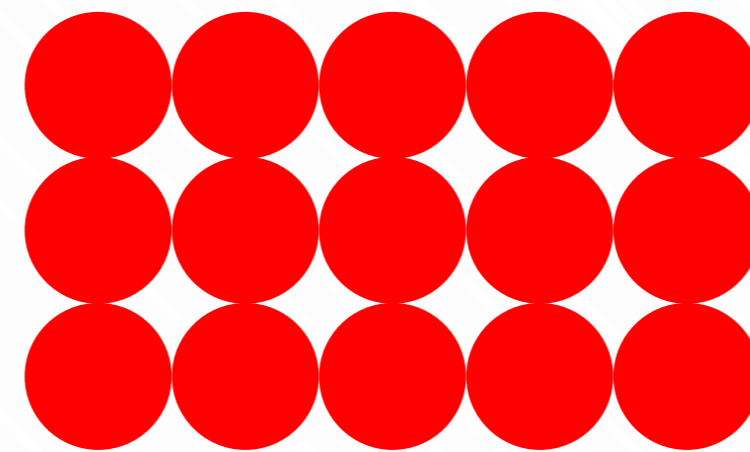
27

TV



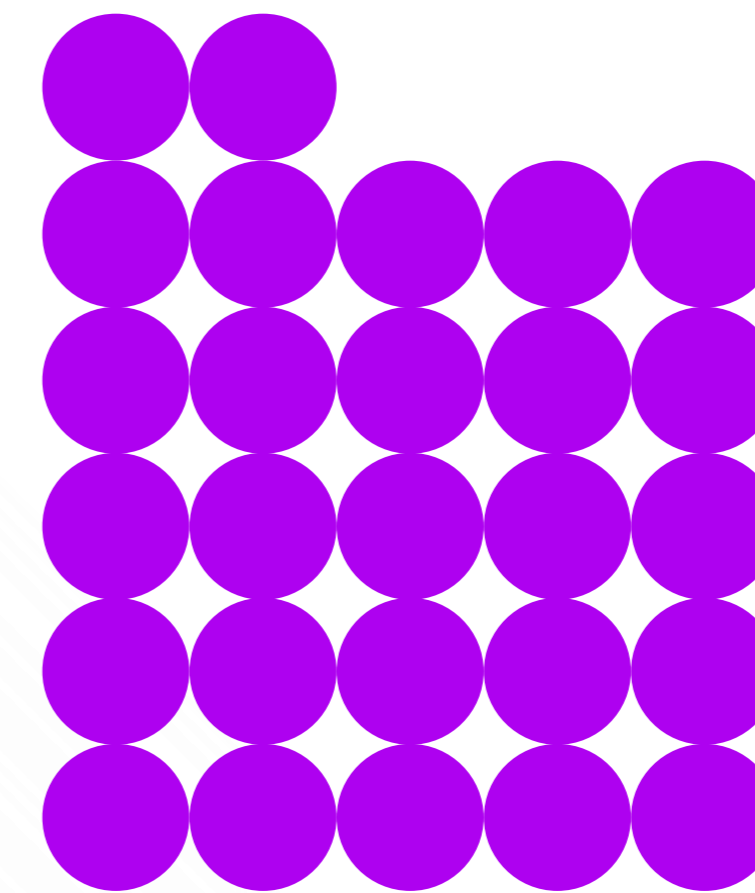
18

BVOD



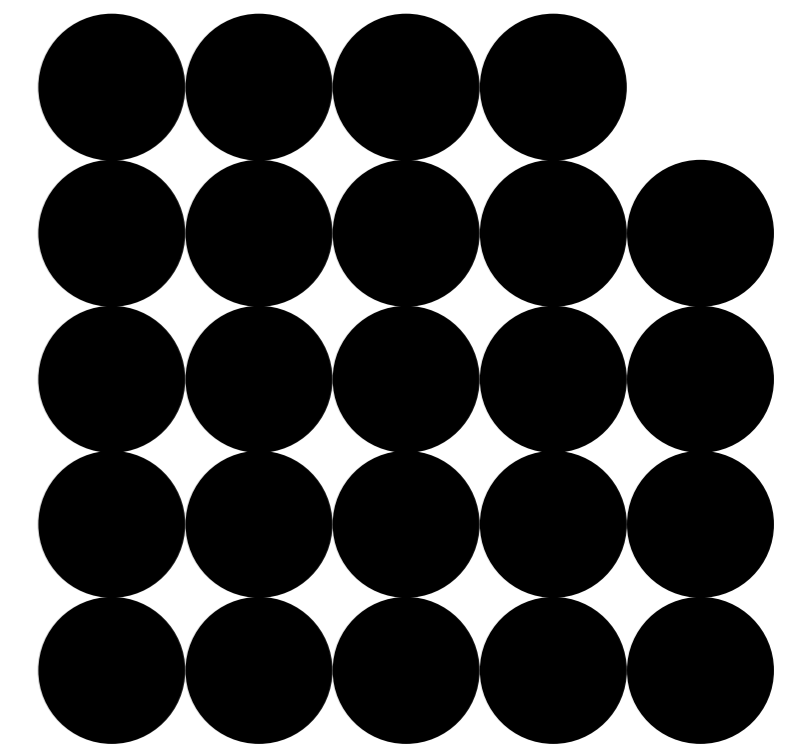
15

YouTube



27

Instagram



24

TikTok

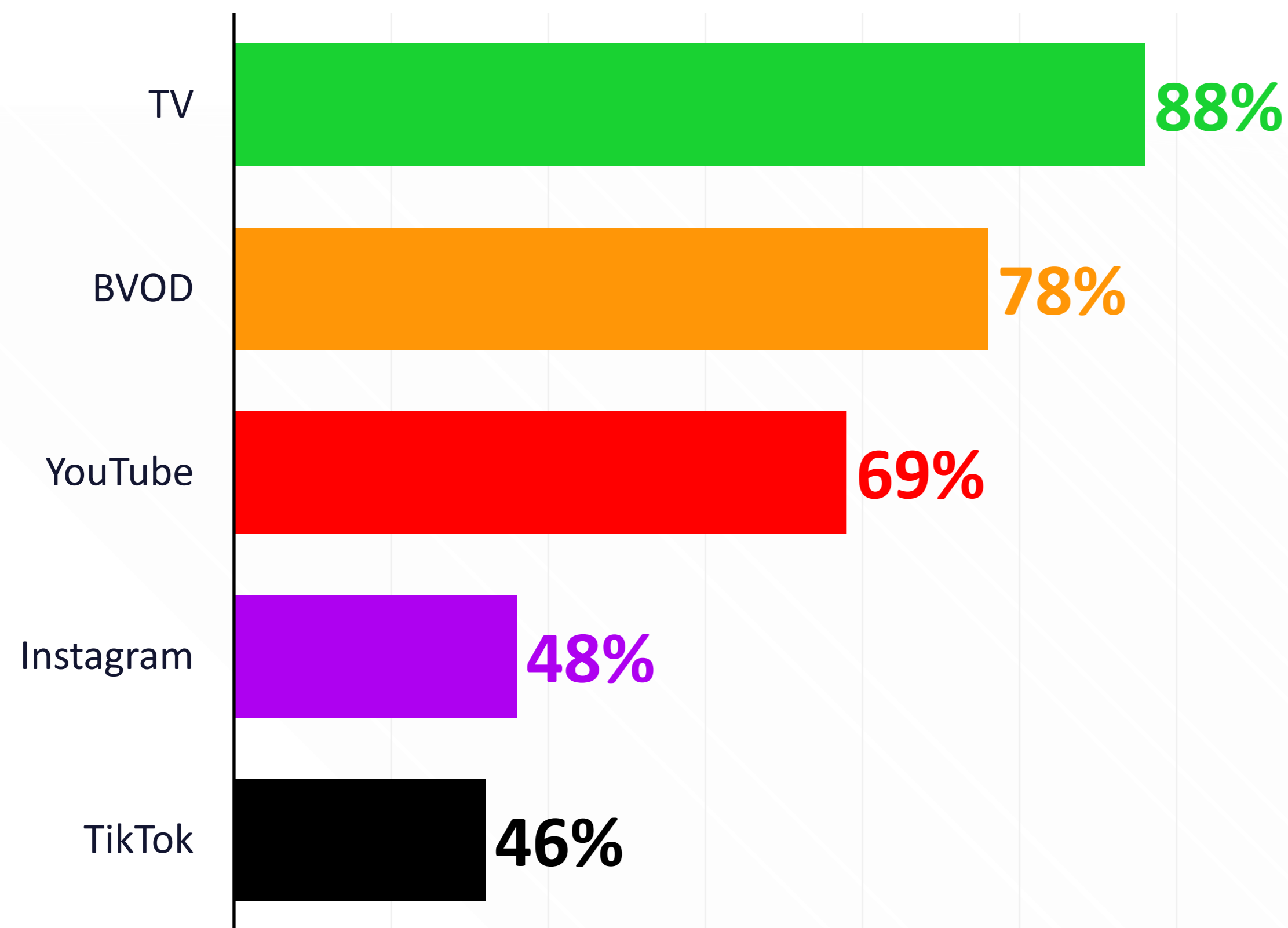
-9
static Ads

-17
static Ads

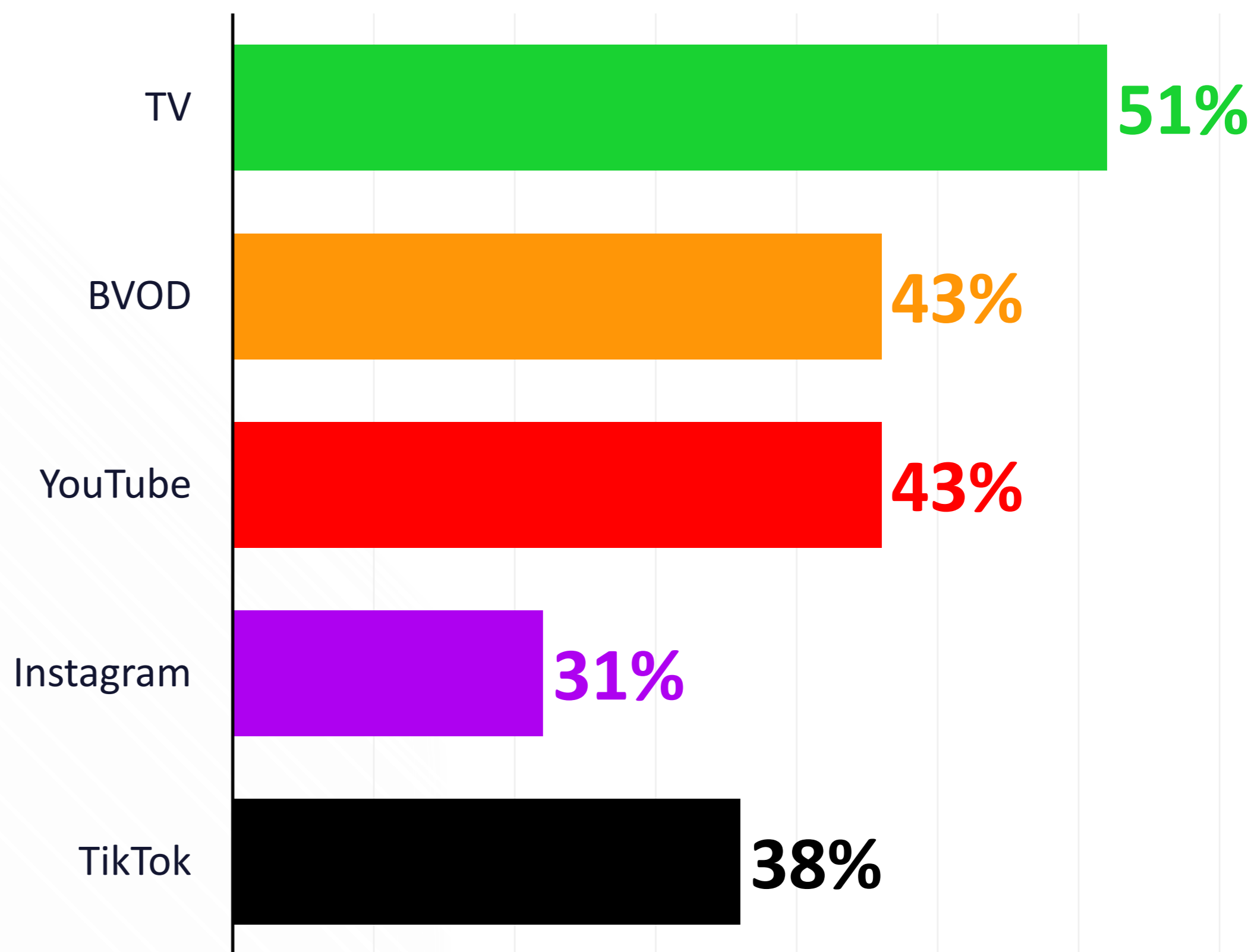
More professional TV environment also affects brand image

Agreement with brand image statements (top2) in %.

“Well-known brands advertise here”

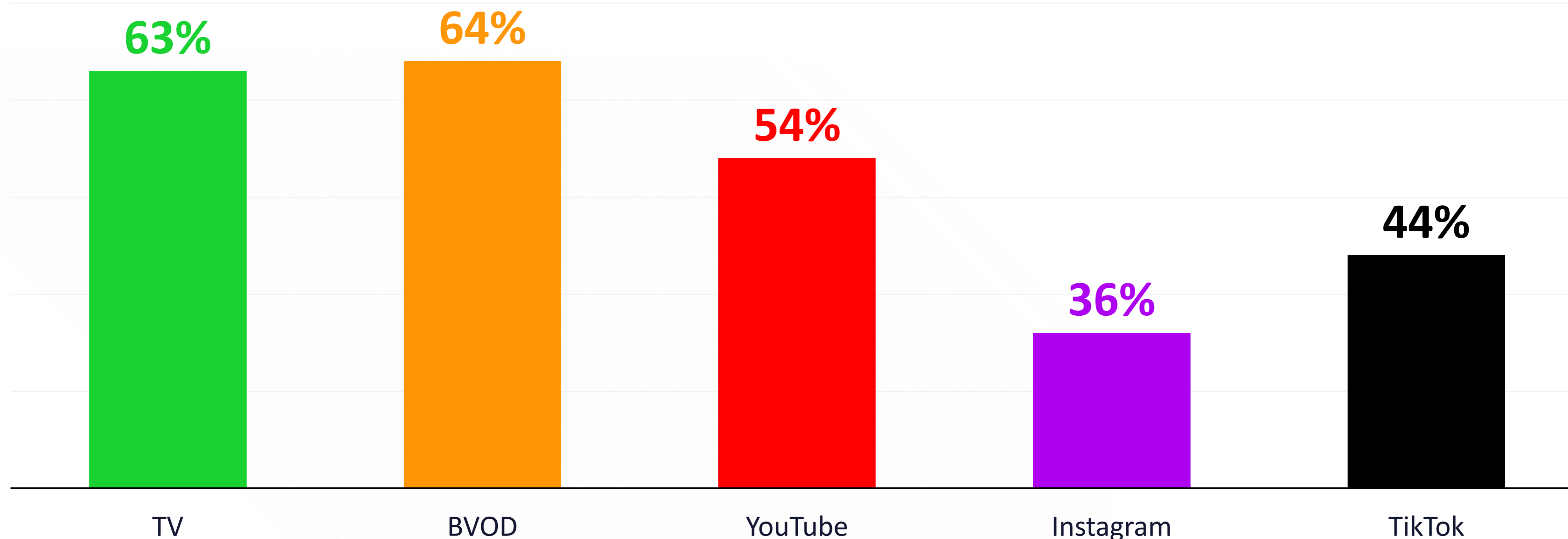


“Attractive brands advertise here”



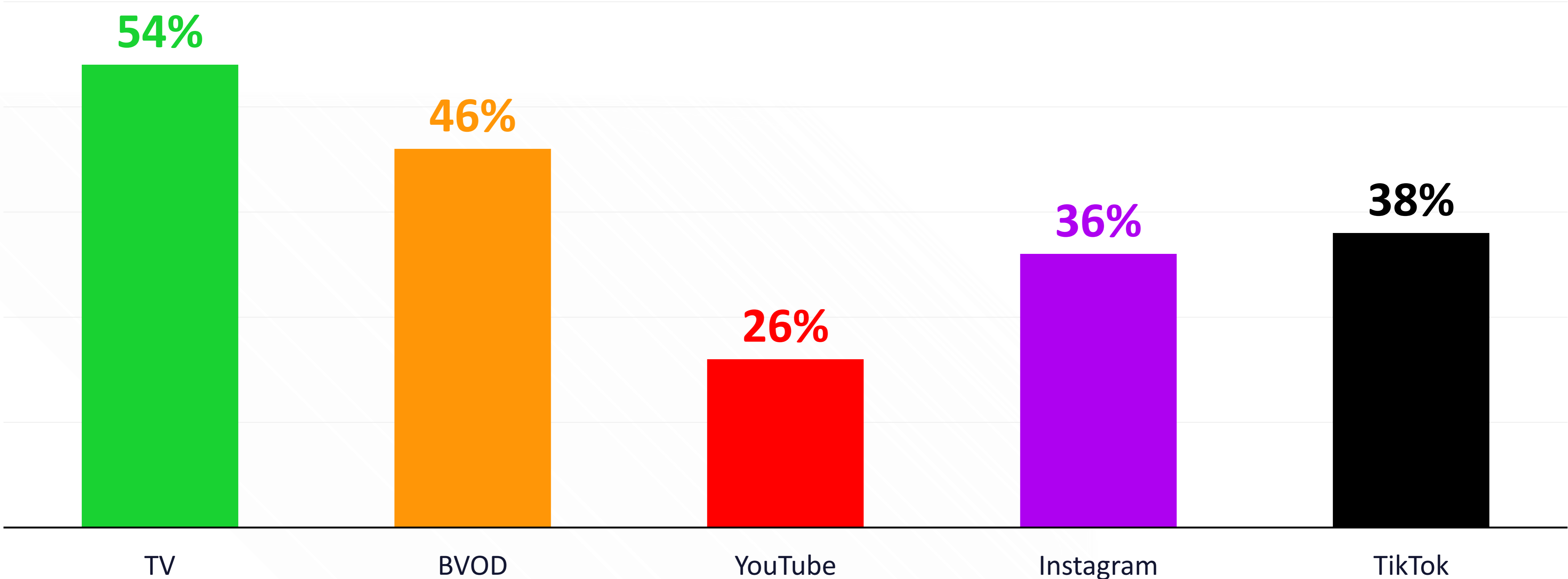
Lower image in social media environments, especially on Instagram

Overall image of the brands per platform (average of 10 top2 items) in %.



TV and BVOD advertising also lead in terms of product interest

General product interest (top2) through advertising per platform in %.

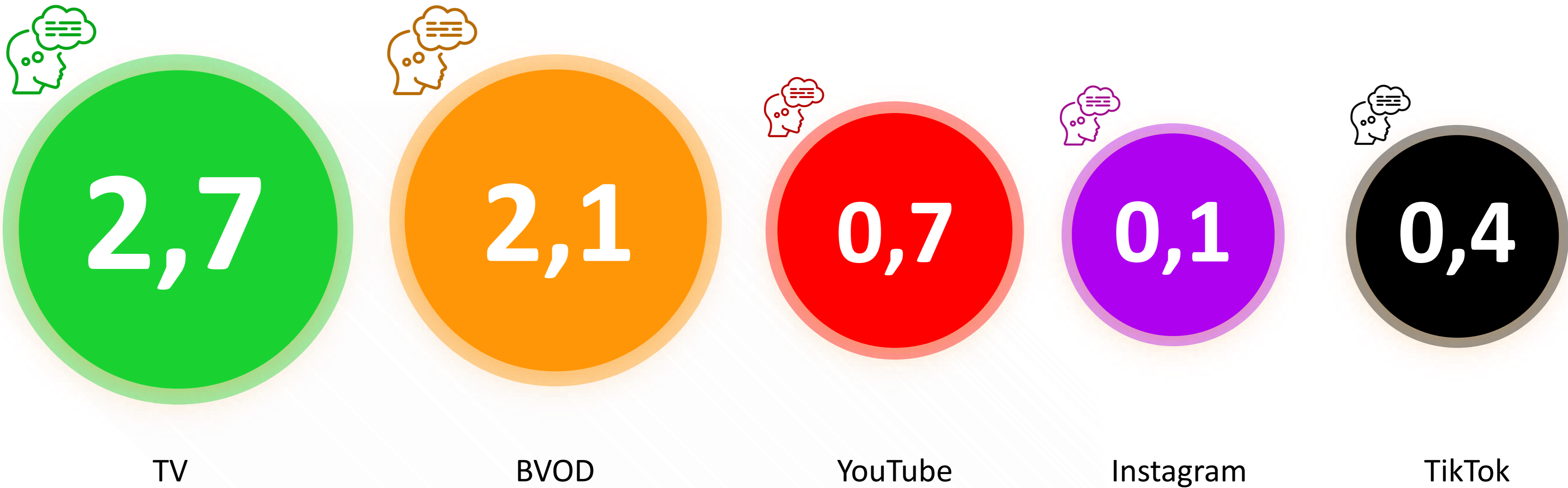


03

Advertising Impact

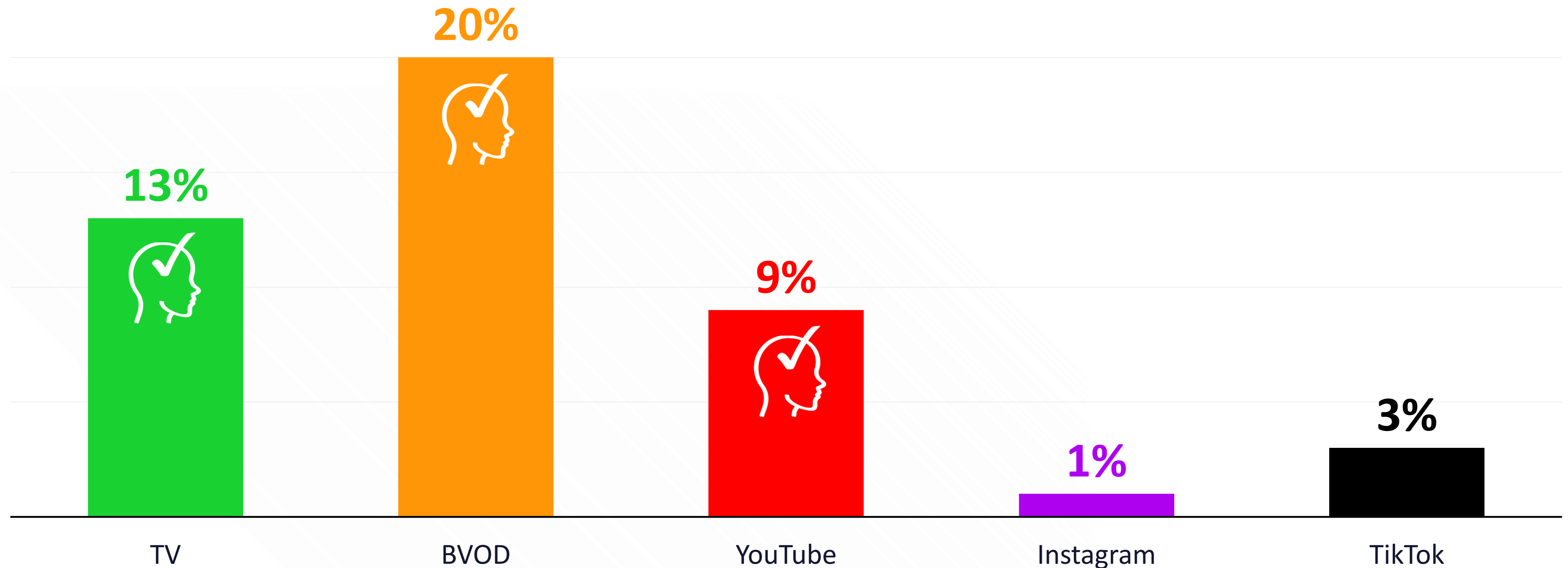
TV viewers can name the most brands

Number of free and correct brand mentions per person and platform.



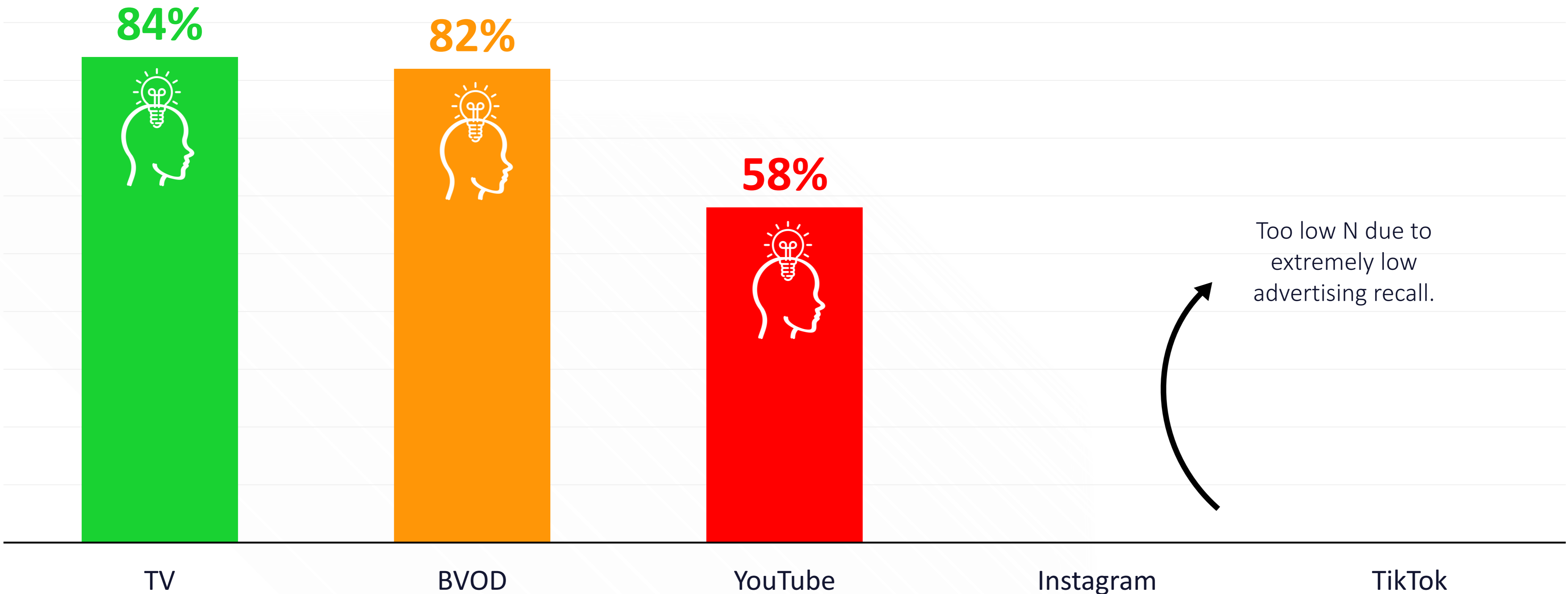
Highest advertising recall for BVOD and TV

Free advertising recall: Correctly recalled free video advertising contacts per platform in %.



TV advantage in Memory also remains in details

Detail recall: Proportion of correctly memorised ad contacts with recalled details per platform in %.

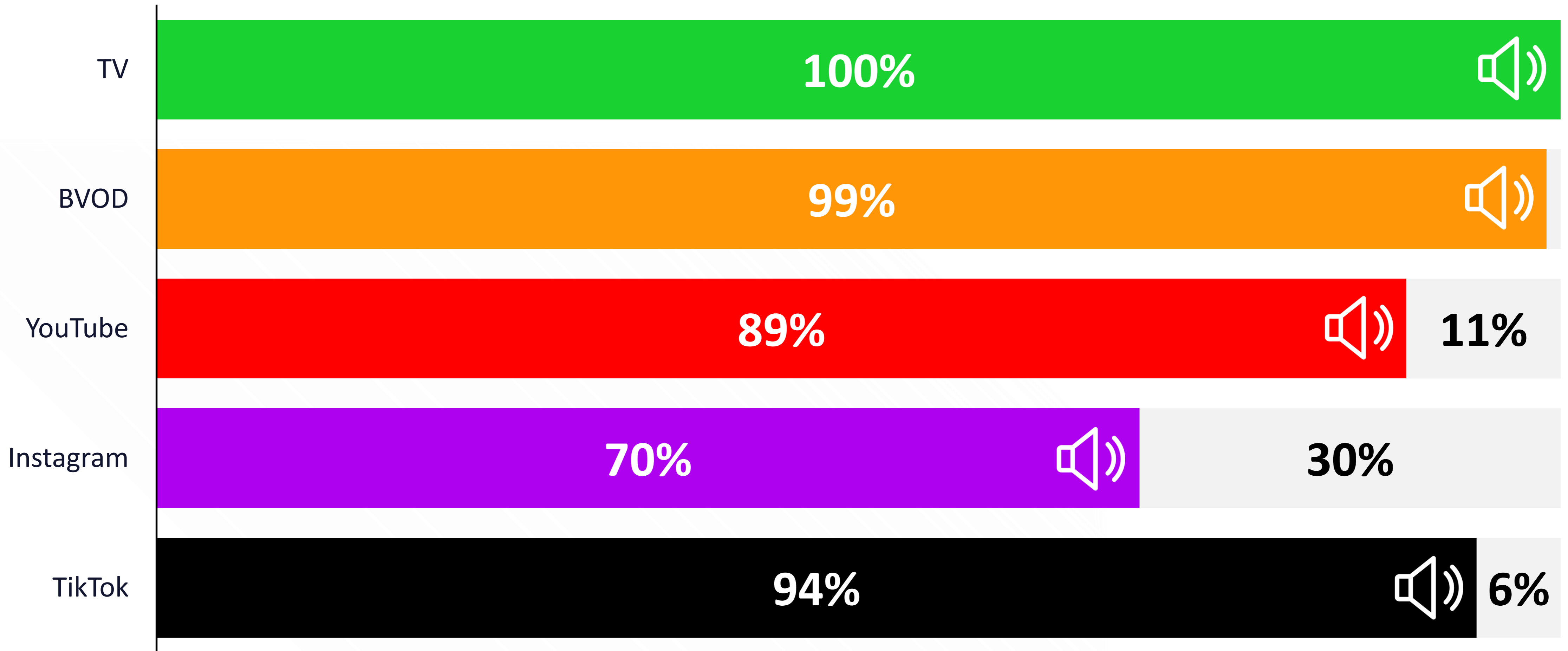


04

Attention and Perception

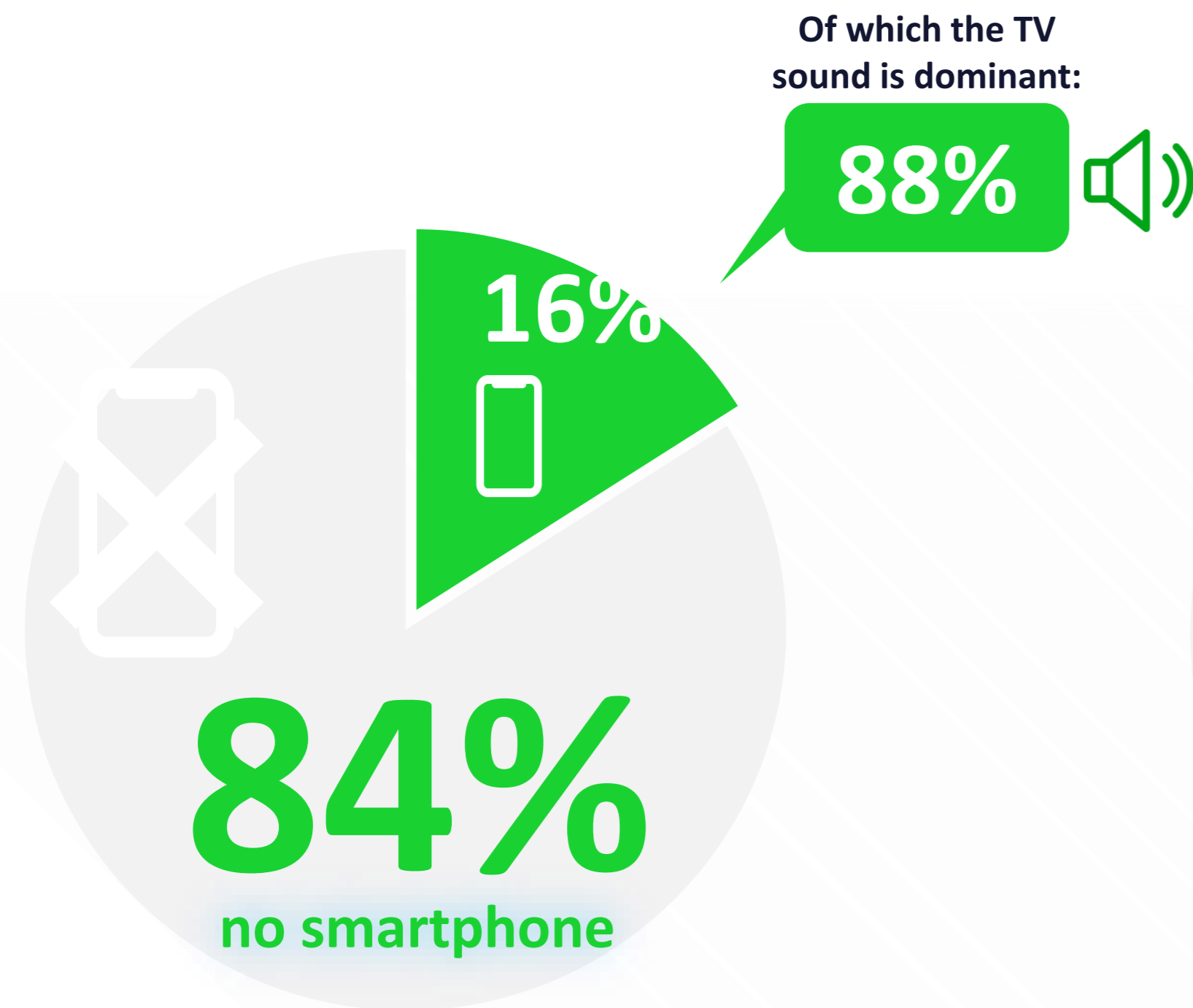
Almost one third of all Instagram ads are muted

Sound switched on during advertising contacts per platform in %.

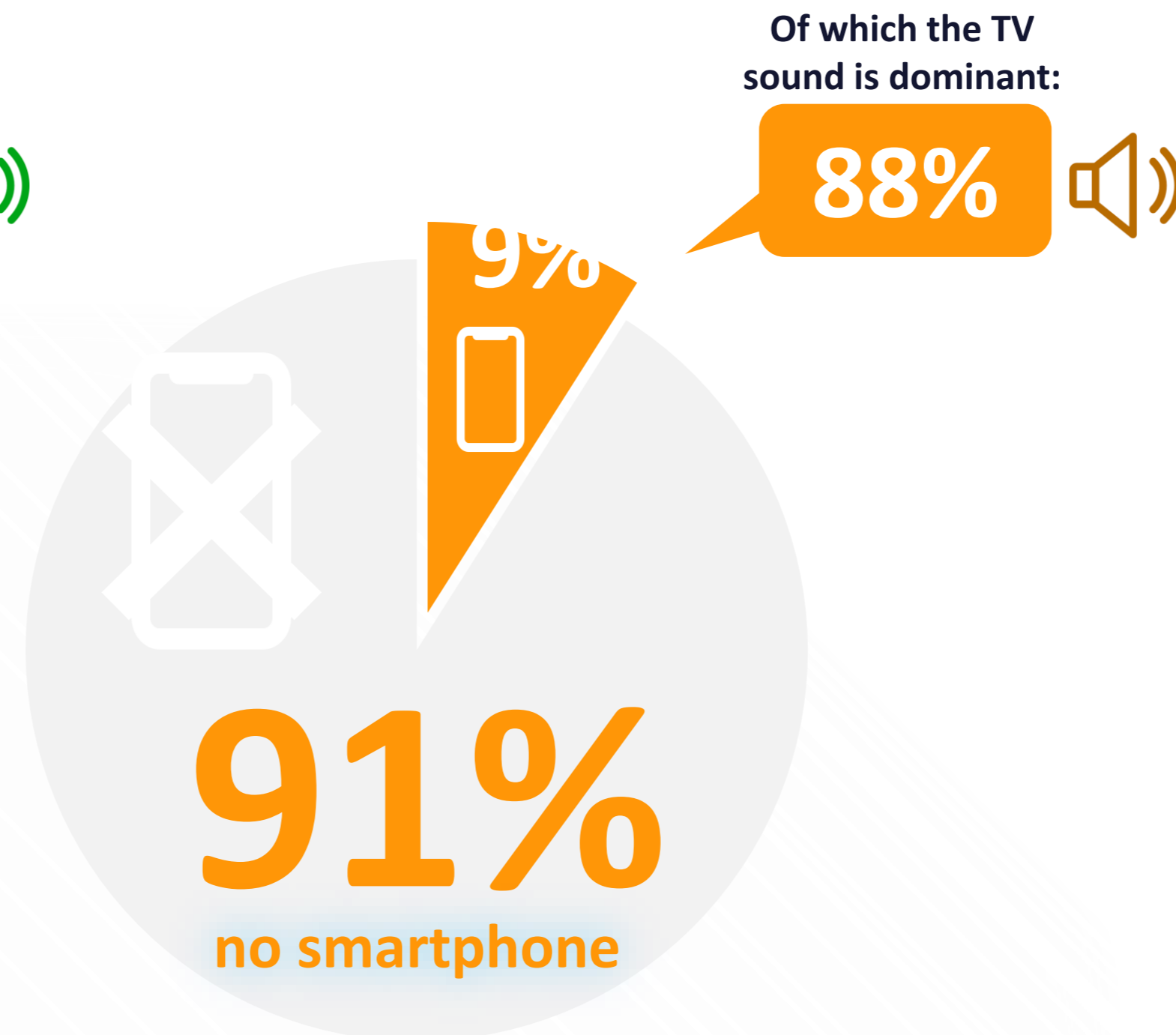


Don't fear the second screen during TV commercials

Share of smartphone usage for TV and BVOD during video advertising in %.



Smartphone use during
advertising on TV

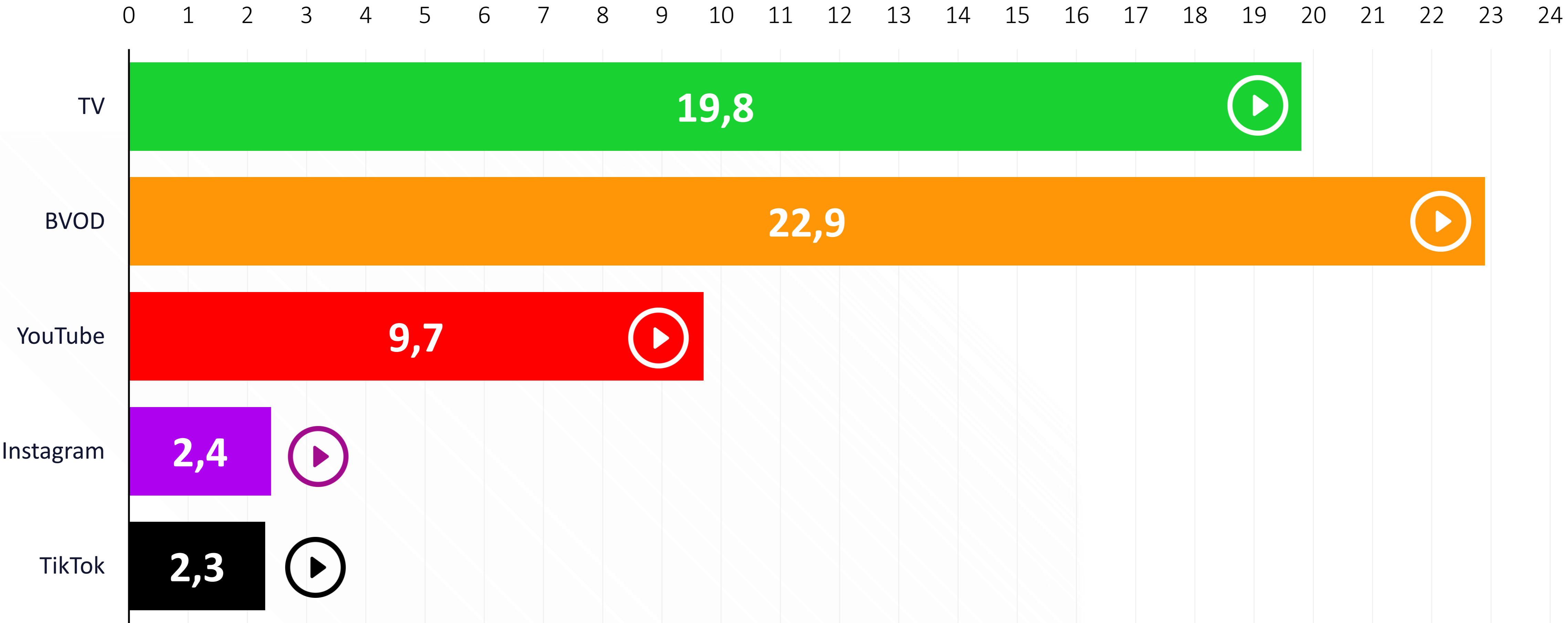


Smartphone use during
advertising at BVOD



Visibility shows pronounced advertising avoidance on social media

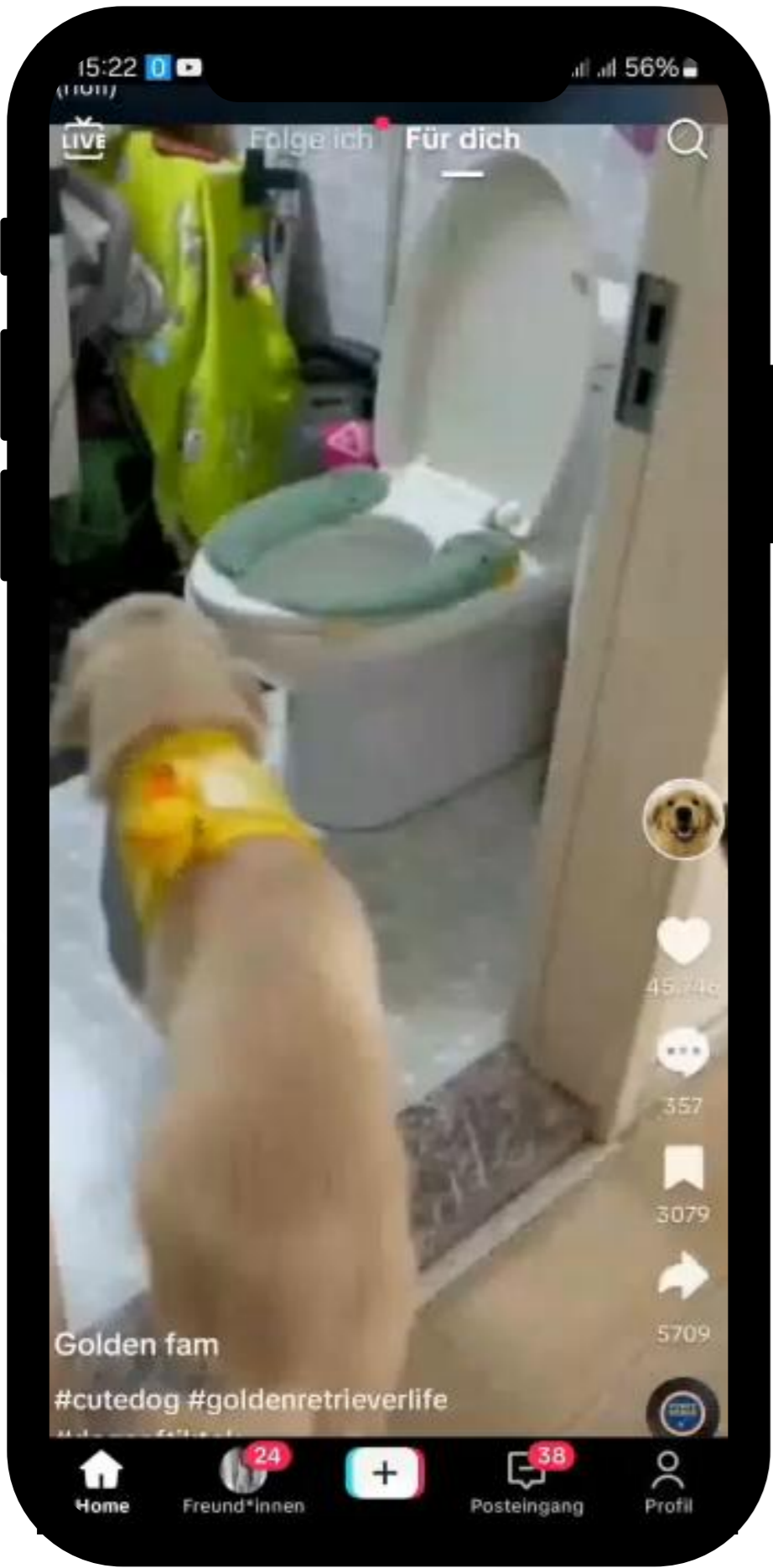
Visibility (median) of all video advertising contacts per platform in seconds.



Short contacts on social media hinder memorability

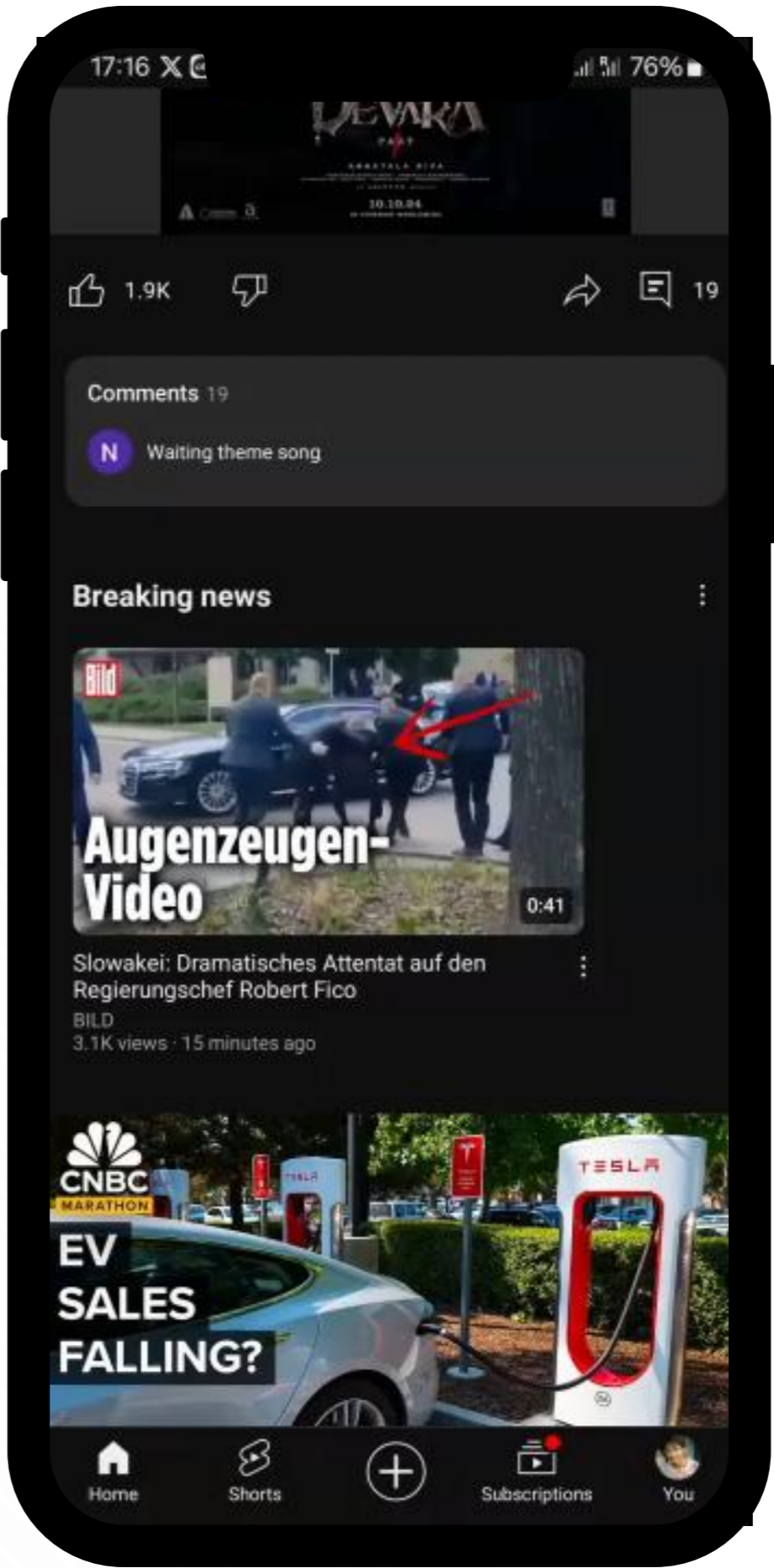
A brand message cannot be adequately communicated in only 2.5 seconds.

TikTok



zalando

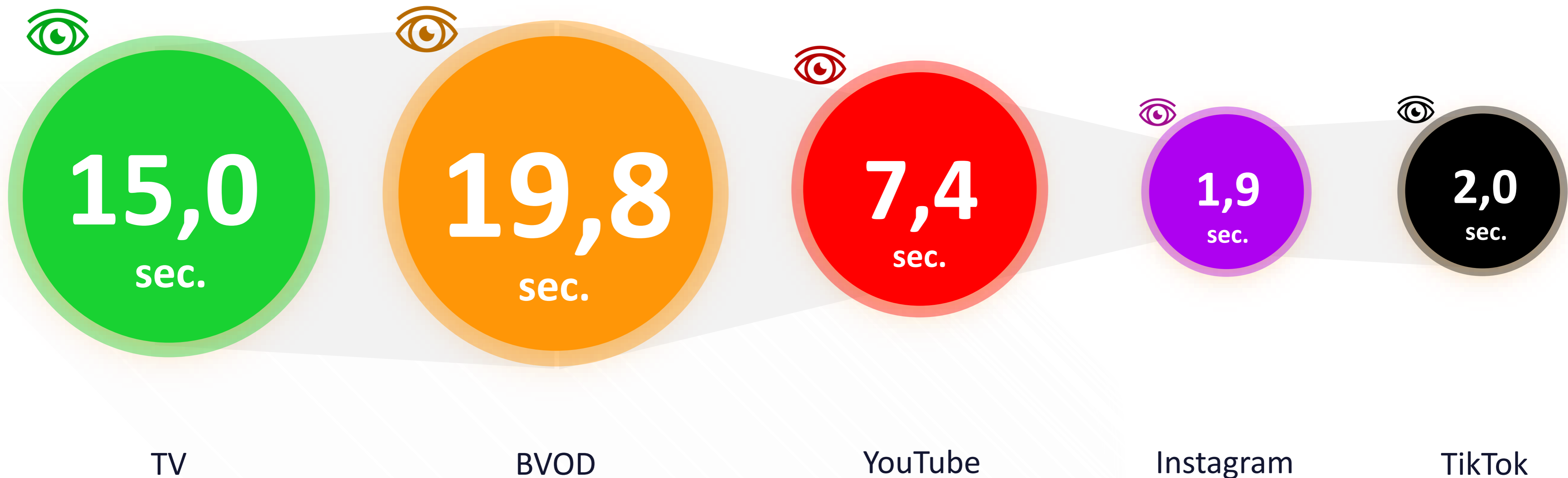
YouTube



taxfix

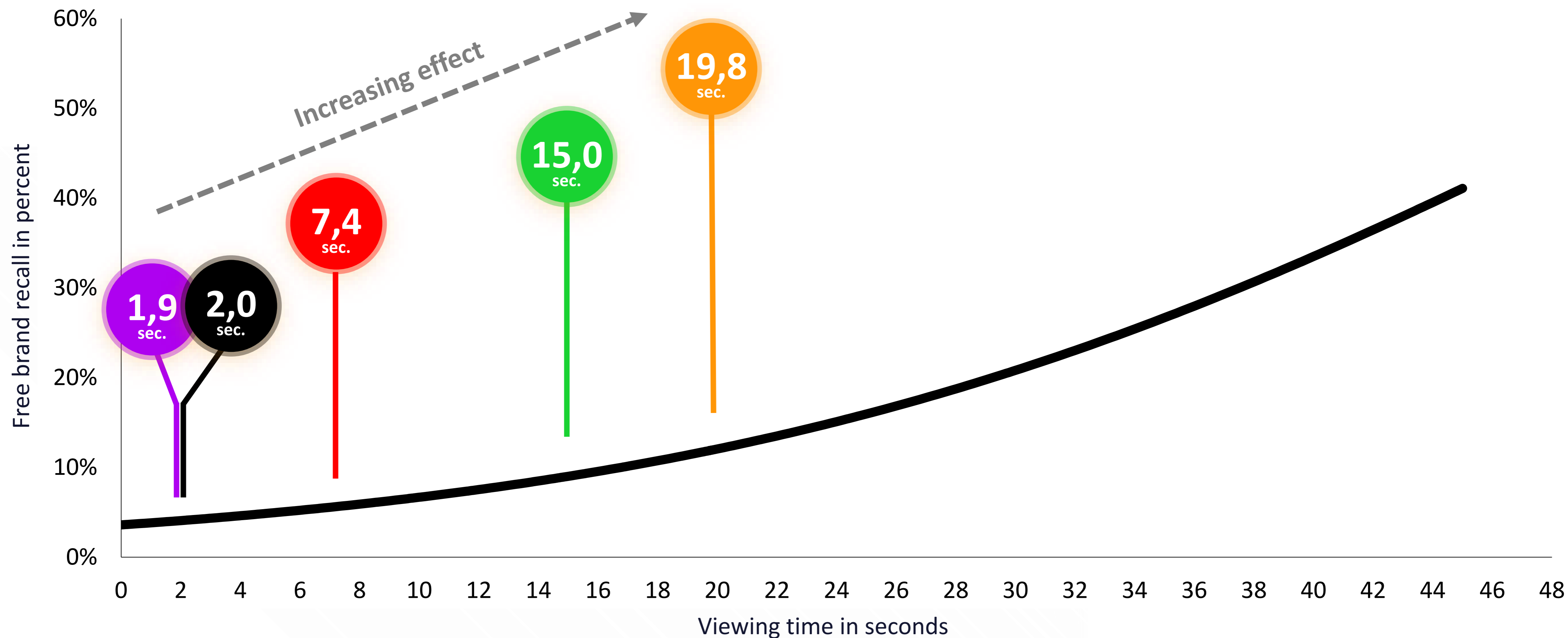
Just two seconds of actual attention on Instagram and TikTok

Eyes on Ad: Viewing time (median) of all video advertising contacts per platform in seconds.



Model reveals: Watching longer means remembering better

Correlation between viewing time and brand recall as well as median viewing times.



Products are longer in focus when shown on TV or BVOD

Viewing time (median) of participants on the product during advertising in sec.

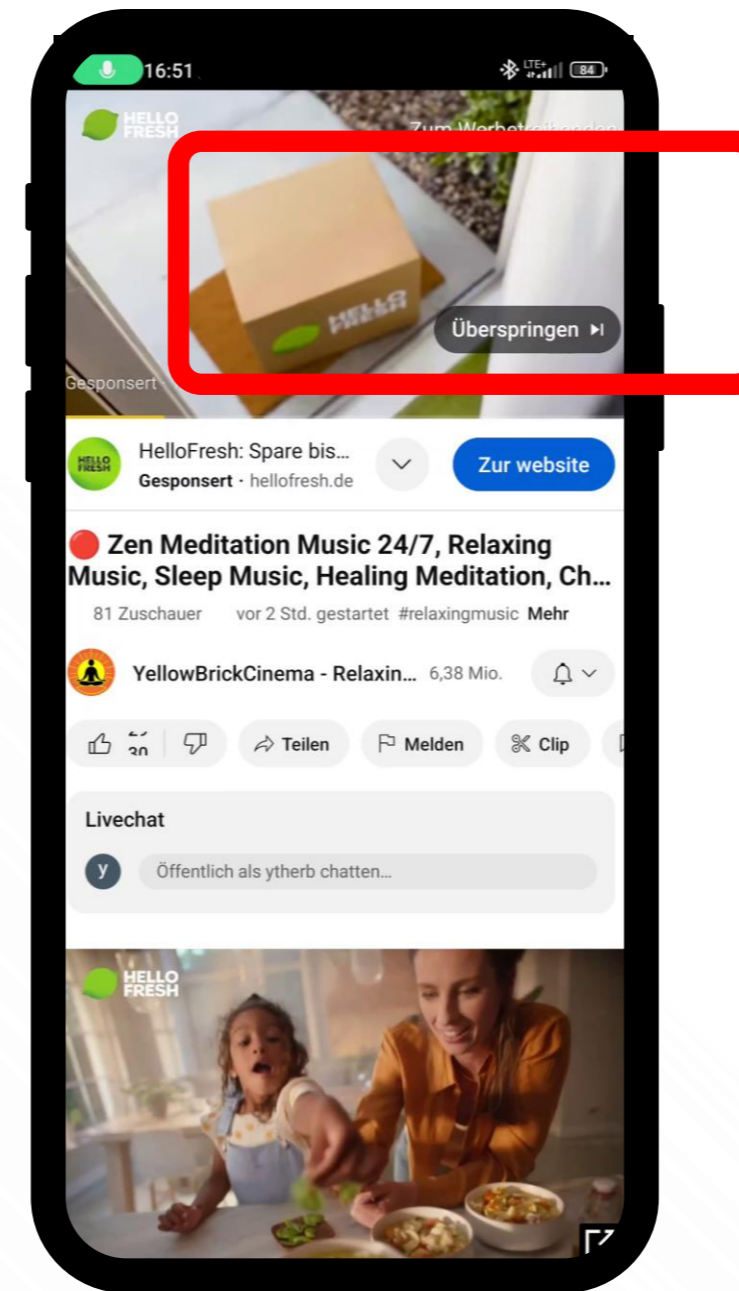
👁️
2,6
sec.

TV



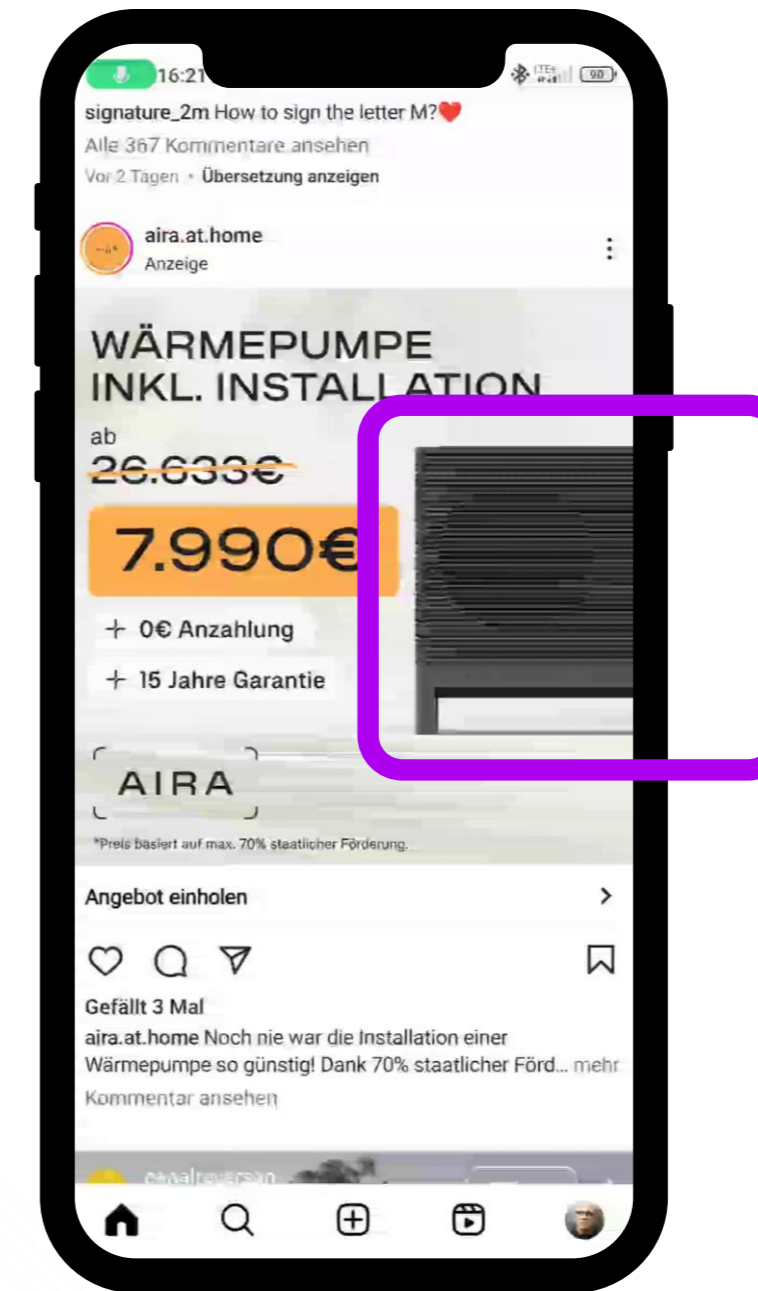
👁️
3,9
sec.

BVOD



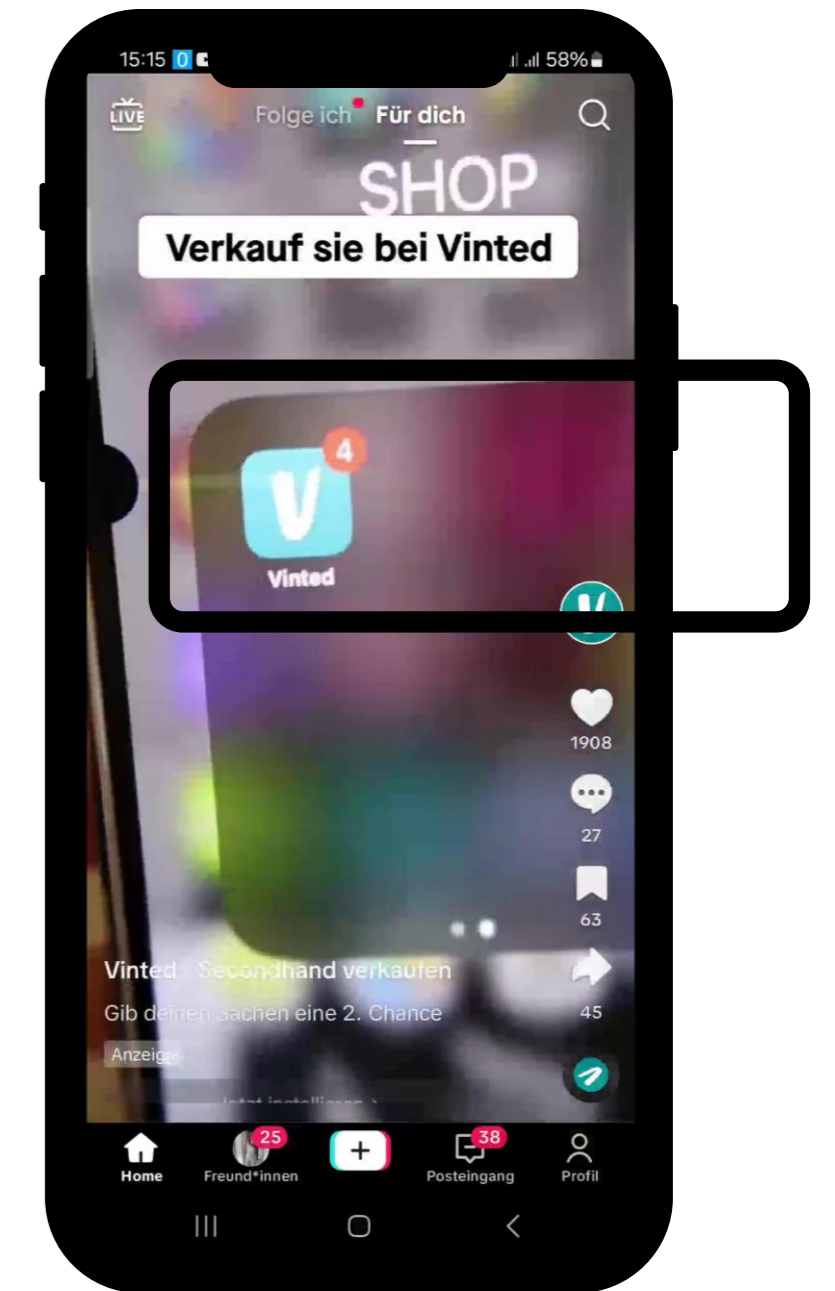
👁️
1,5
sec.

YouTube



👁️
1,1
sec.

Instagram



👁️
1,0
sec.

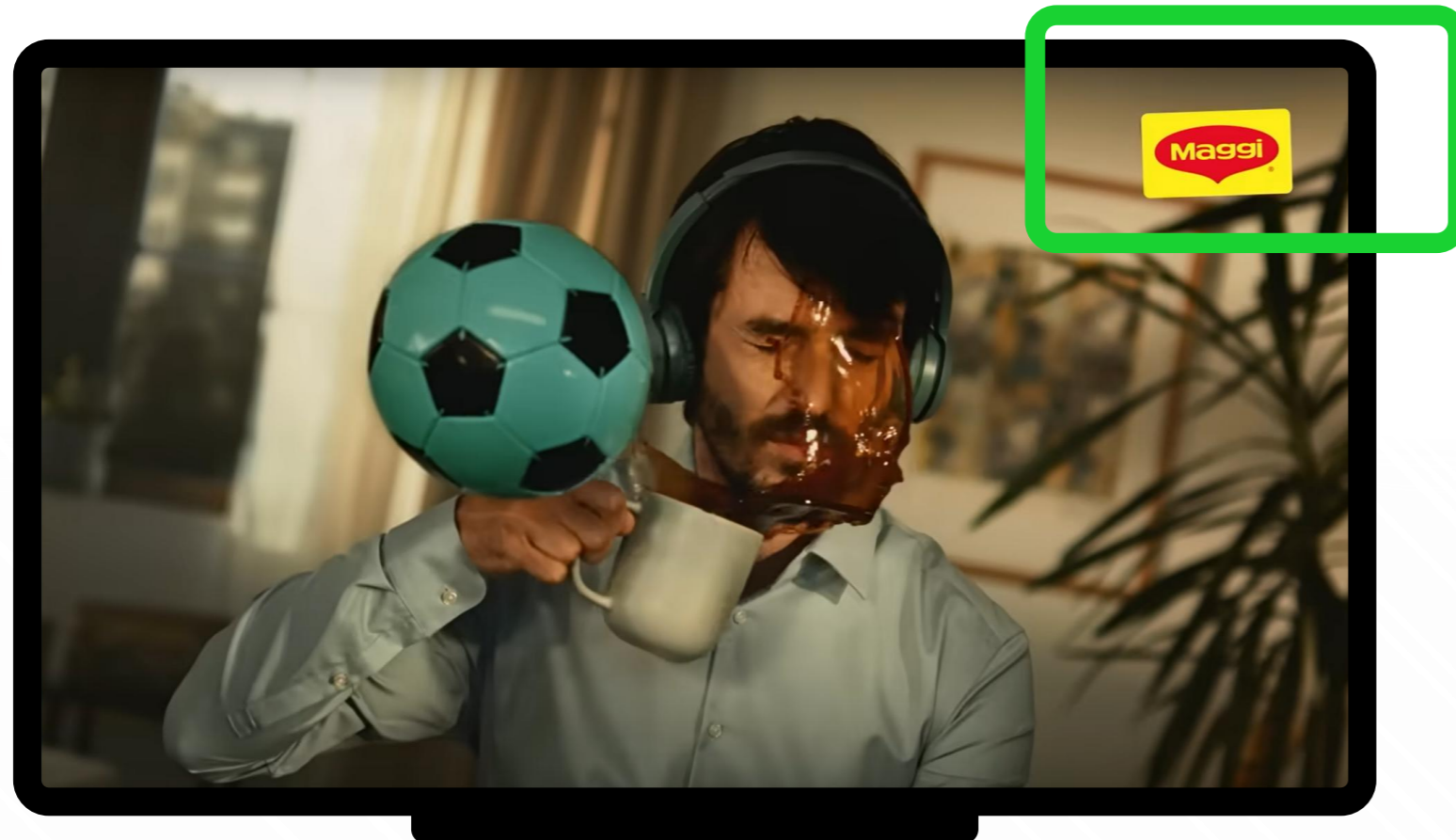
TikTok

Brand logo is focused for more than one second on BVOD

Viewing time (median) of participants on the brand logo during advertising in sec.

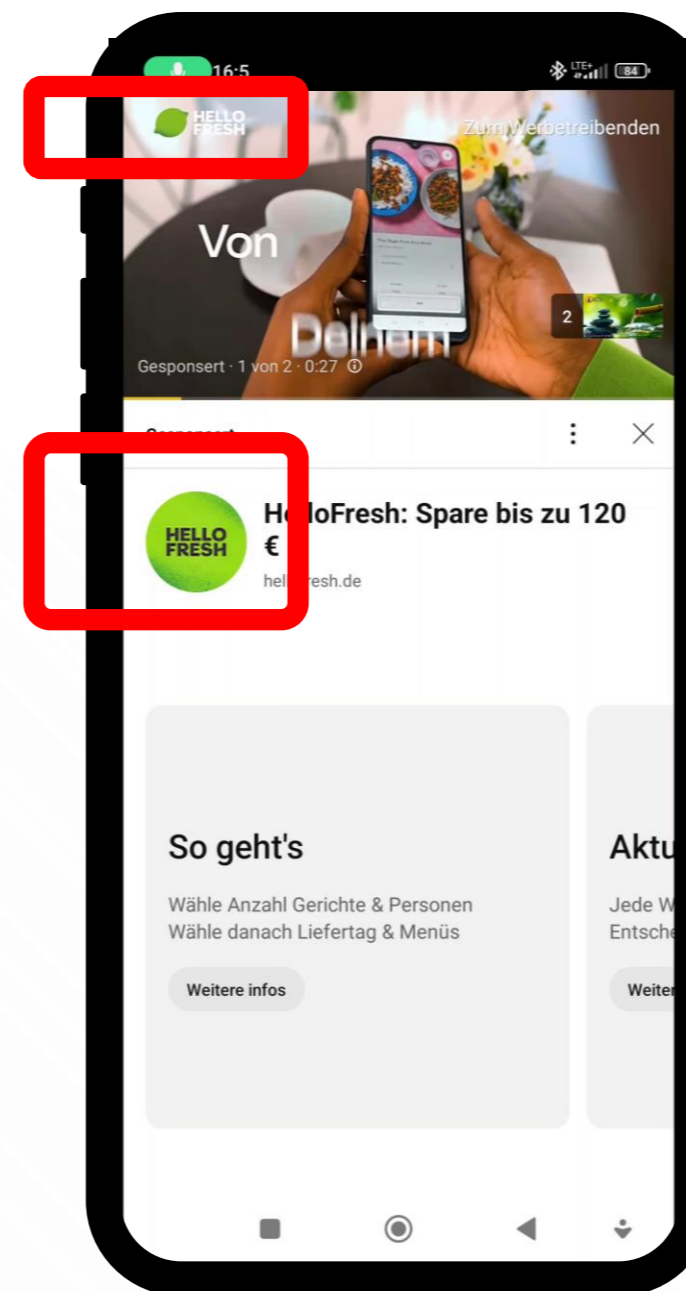
0,6
sec.

TV



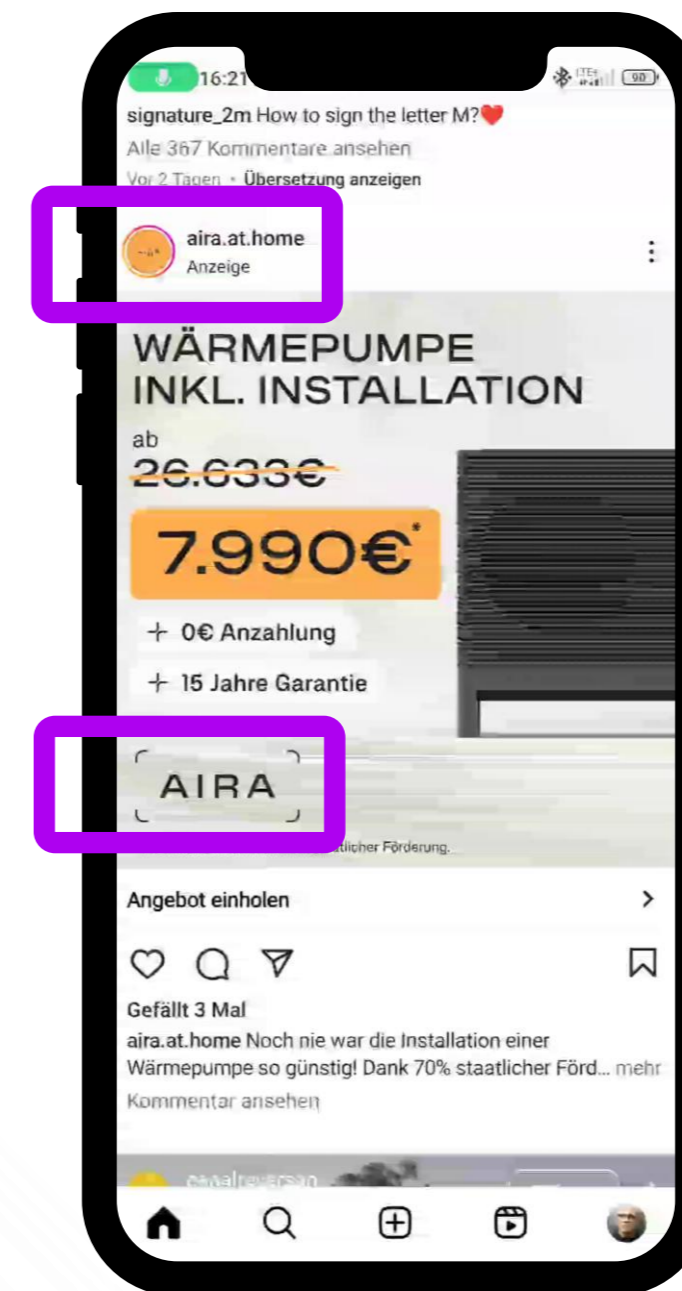
1,2
sec.

BVOD



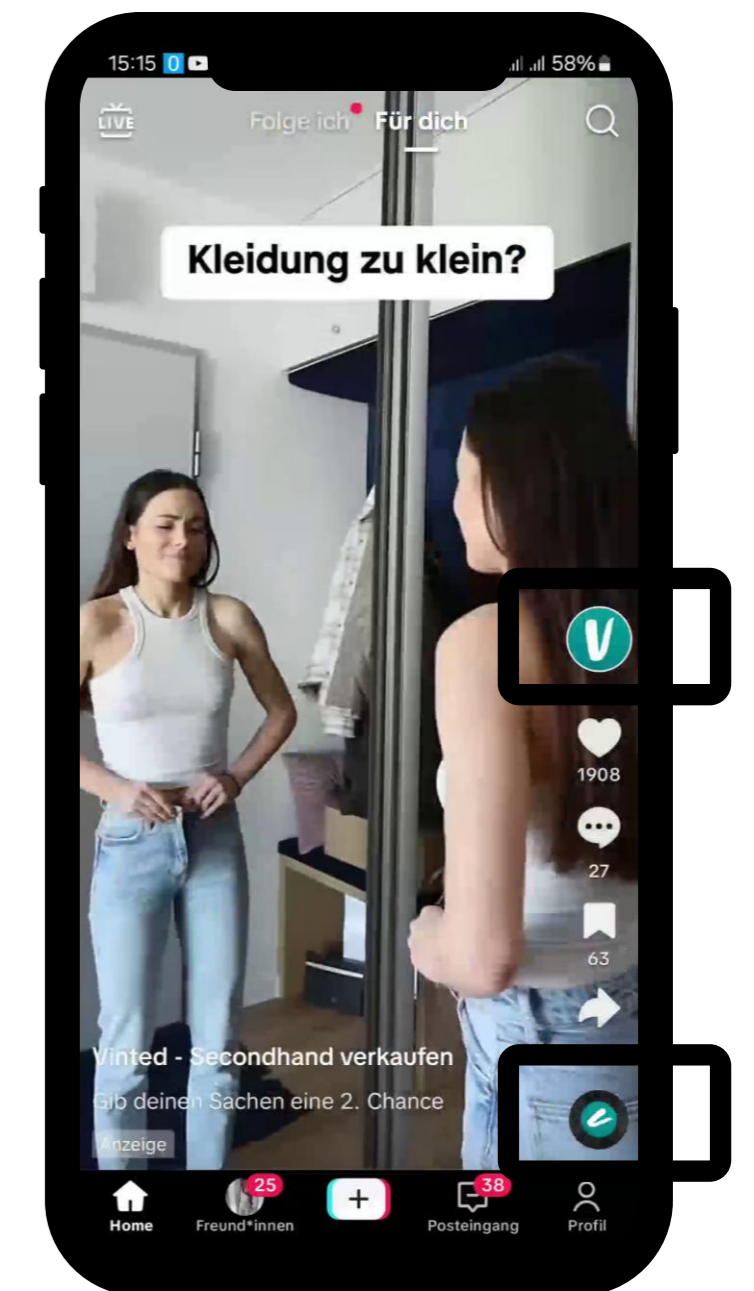
0,3
sec.

YouTube



0,0
sec.

Instagram



0,0
sec.

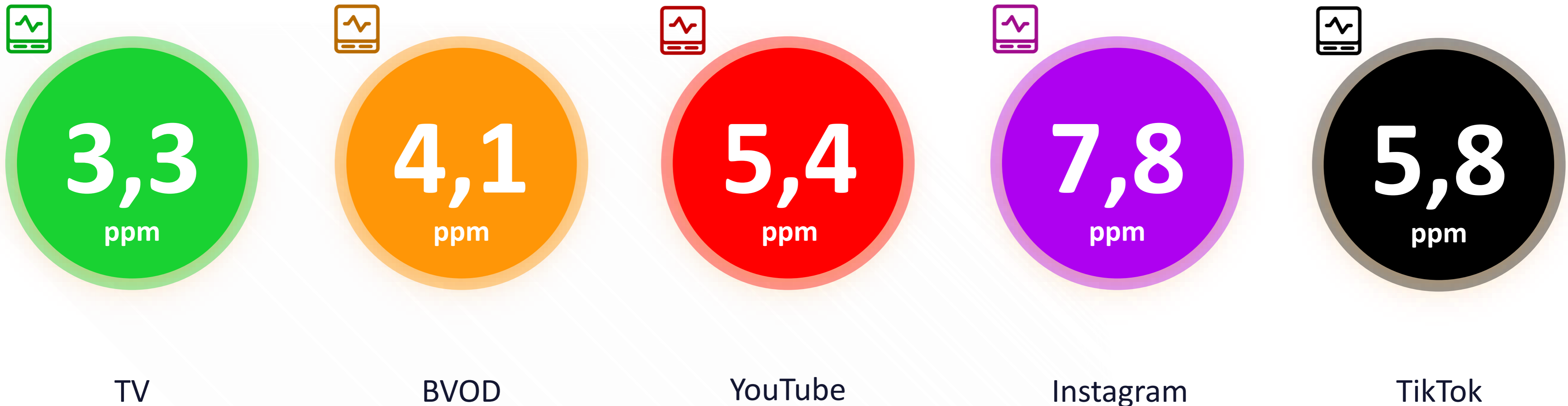
TikTok

05

Activation

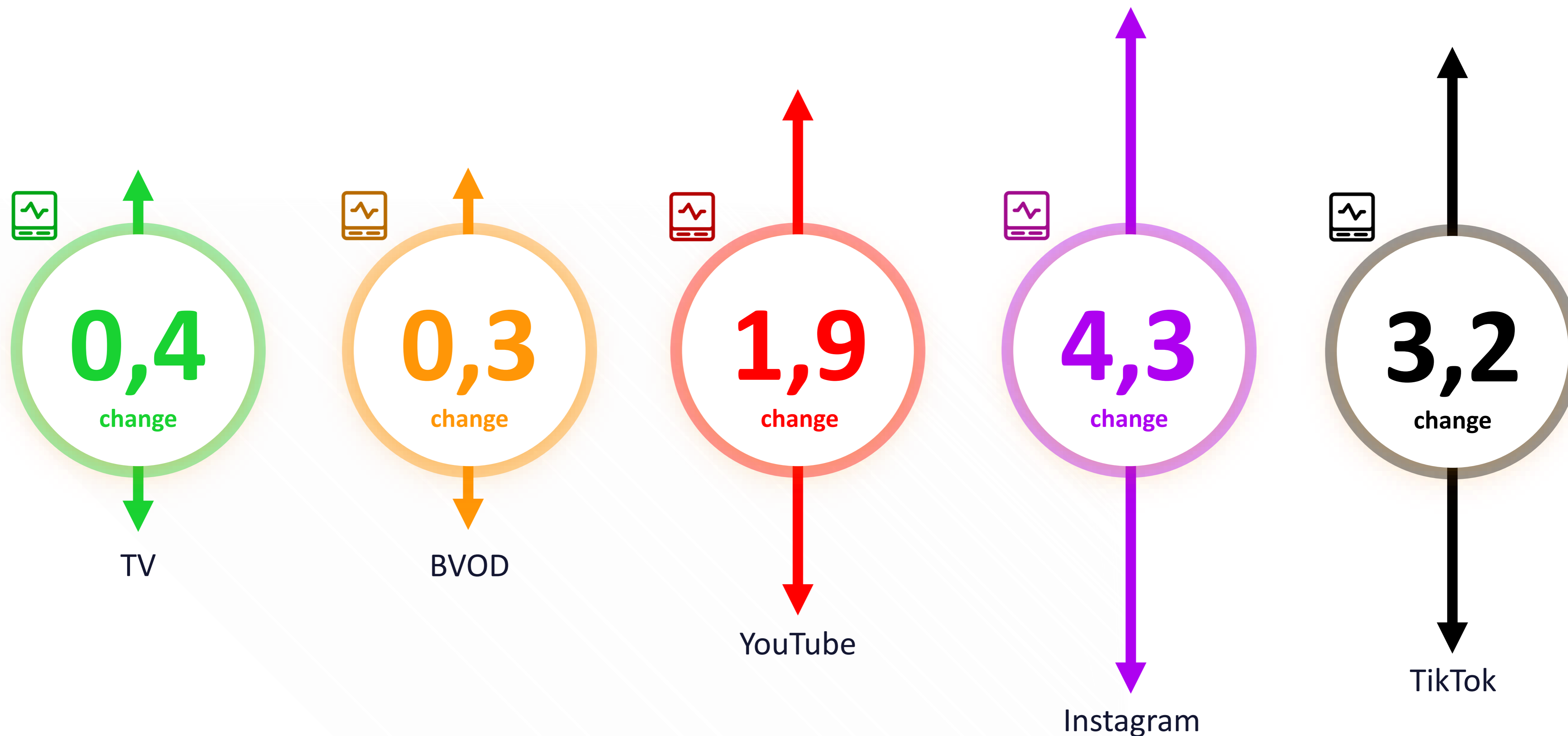
Lean back for TV and BVOD, social media ads activate more strongly

Activation: Tension/excitation as peaks per minute (ppm) during video advertising contacts.



Advertising on social media is far more disruptive than on TV

Activation: Tension/excitation as peaks per minute (ppm) from content to advertising.



06

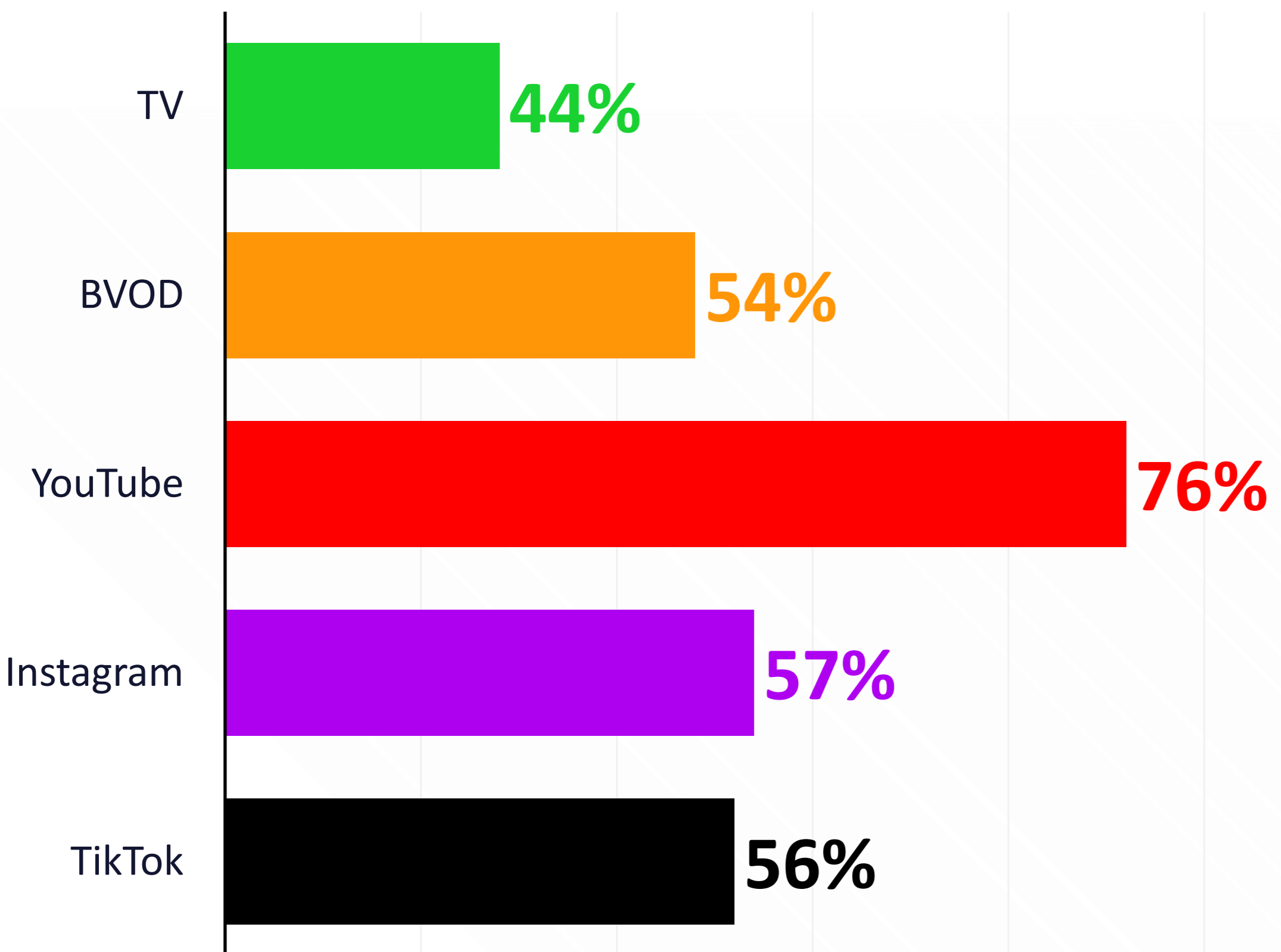
Deep Dive YouTube

YouTube is struggling with a particularly high level of advertising rejection

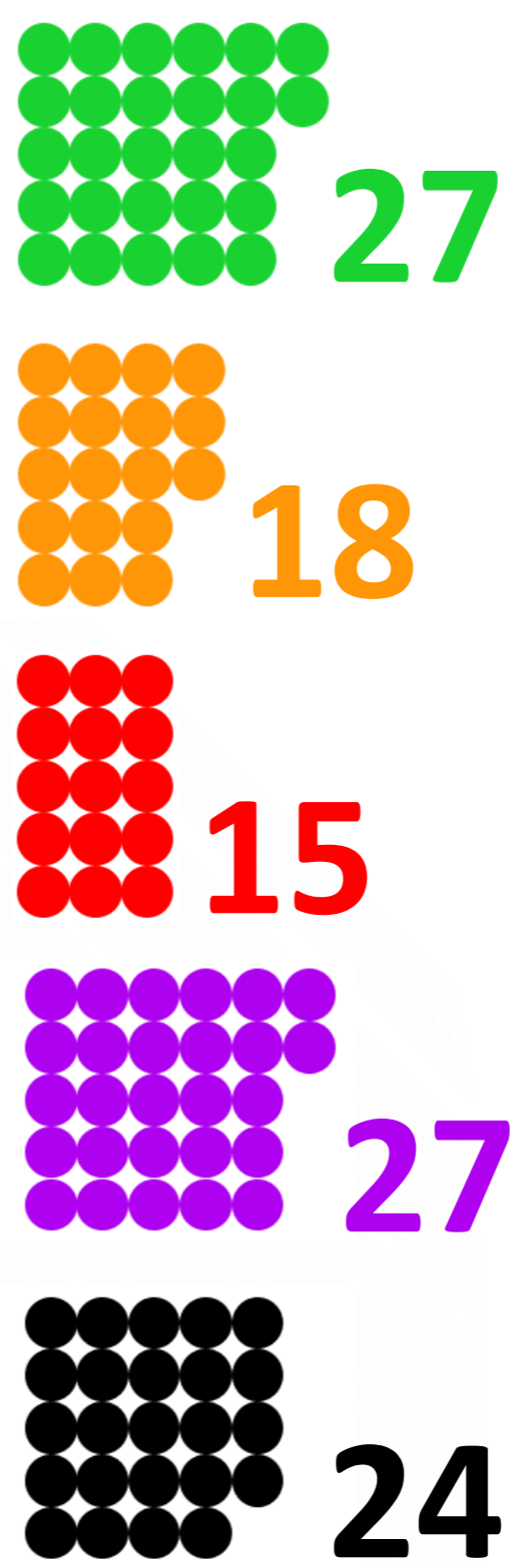
Advertising perception (top2) per platform in %.



“Advertising is particularly annoying here.”

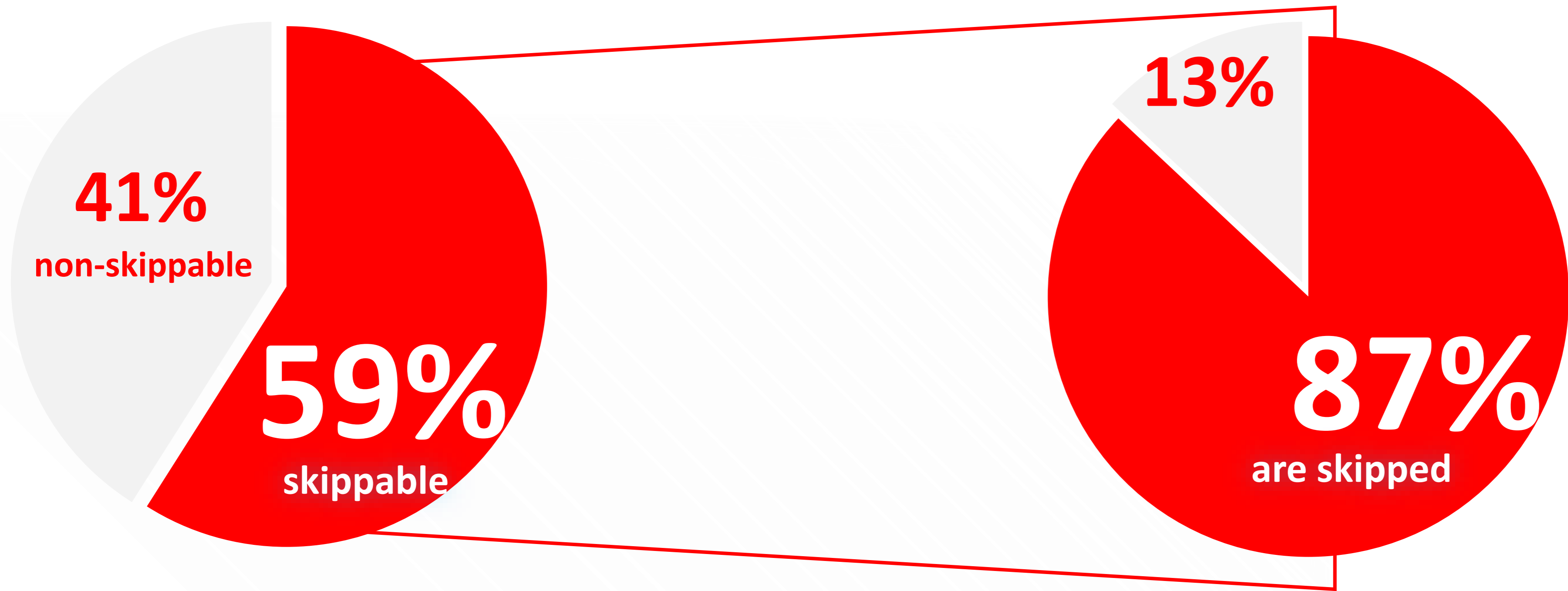


Ad load per hour and person



Simple ad avoidance on YouTube through skipping option

Proportion of skippable video advertising on YouTube and proportionate real skipping behaviour in %.

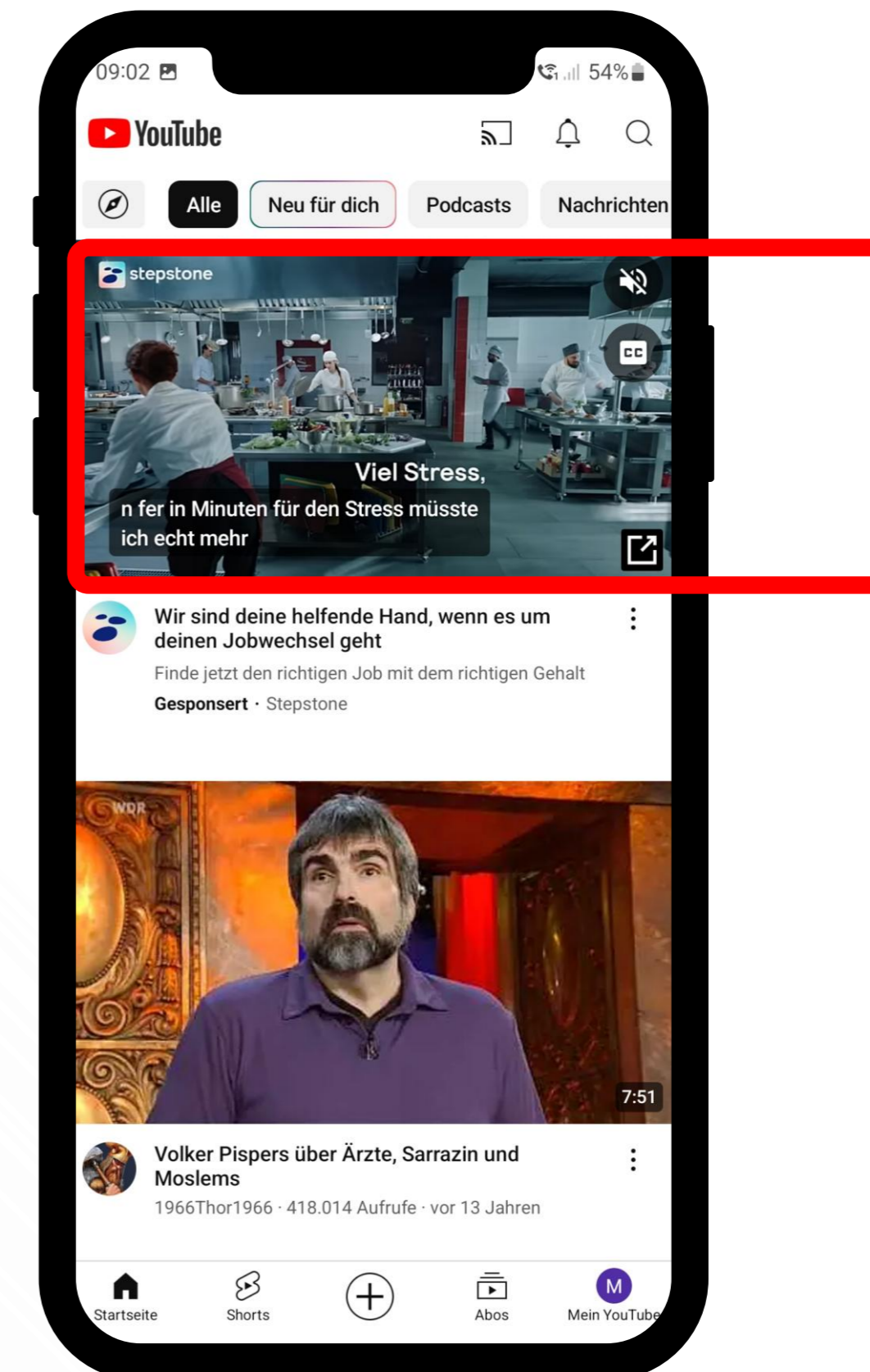


Share of skippable ads
on YouTube

Share of skipped advertising
on YouTube

Fullscreen experience strengthens the advertising impact

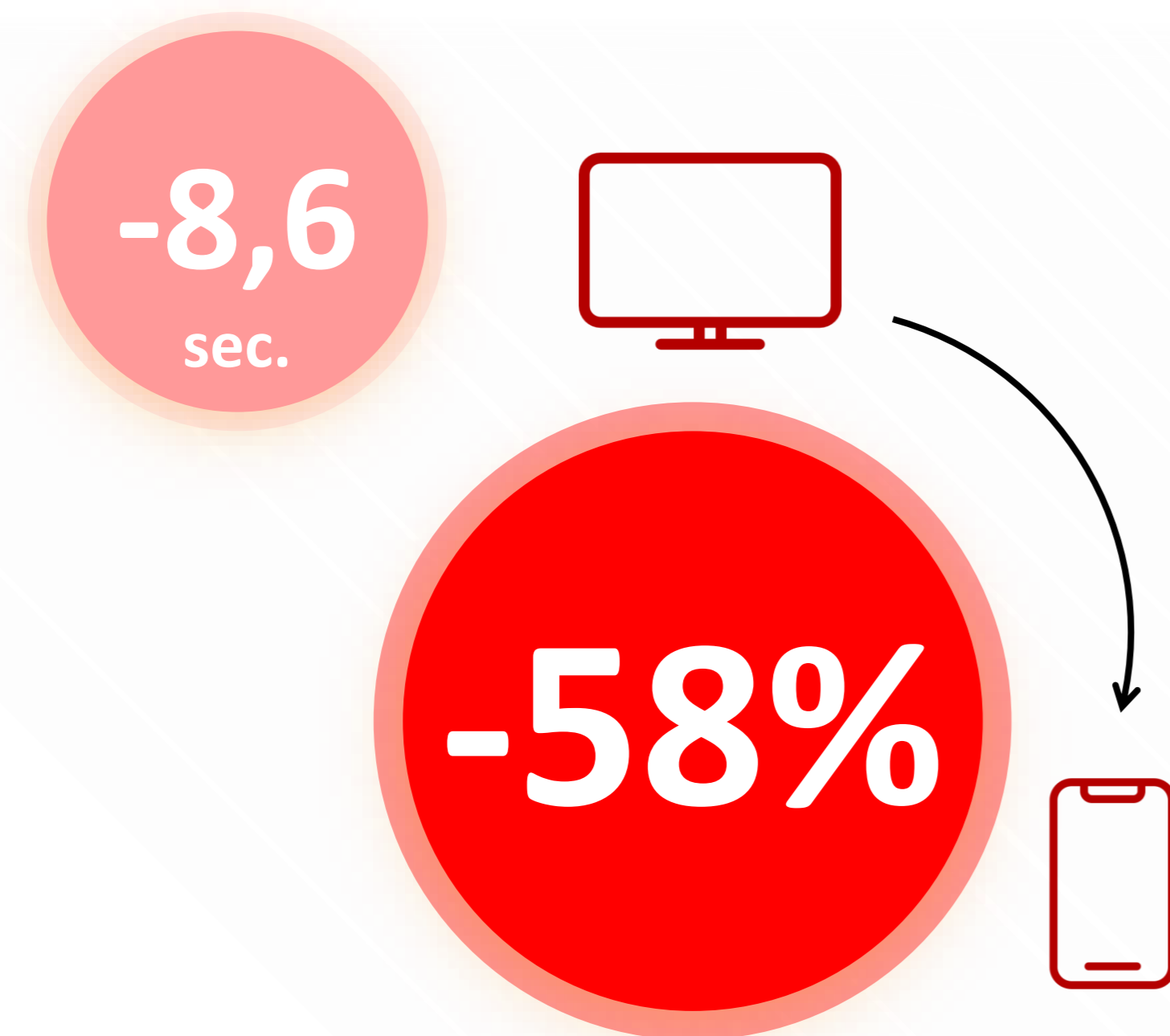
Different usage situations on YouTube Big Screen and Small Screen.



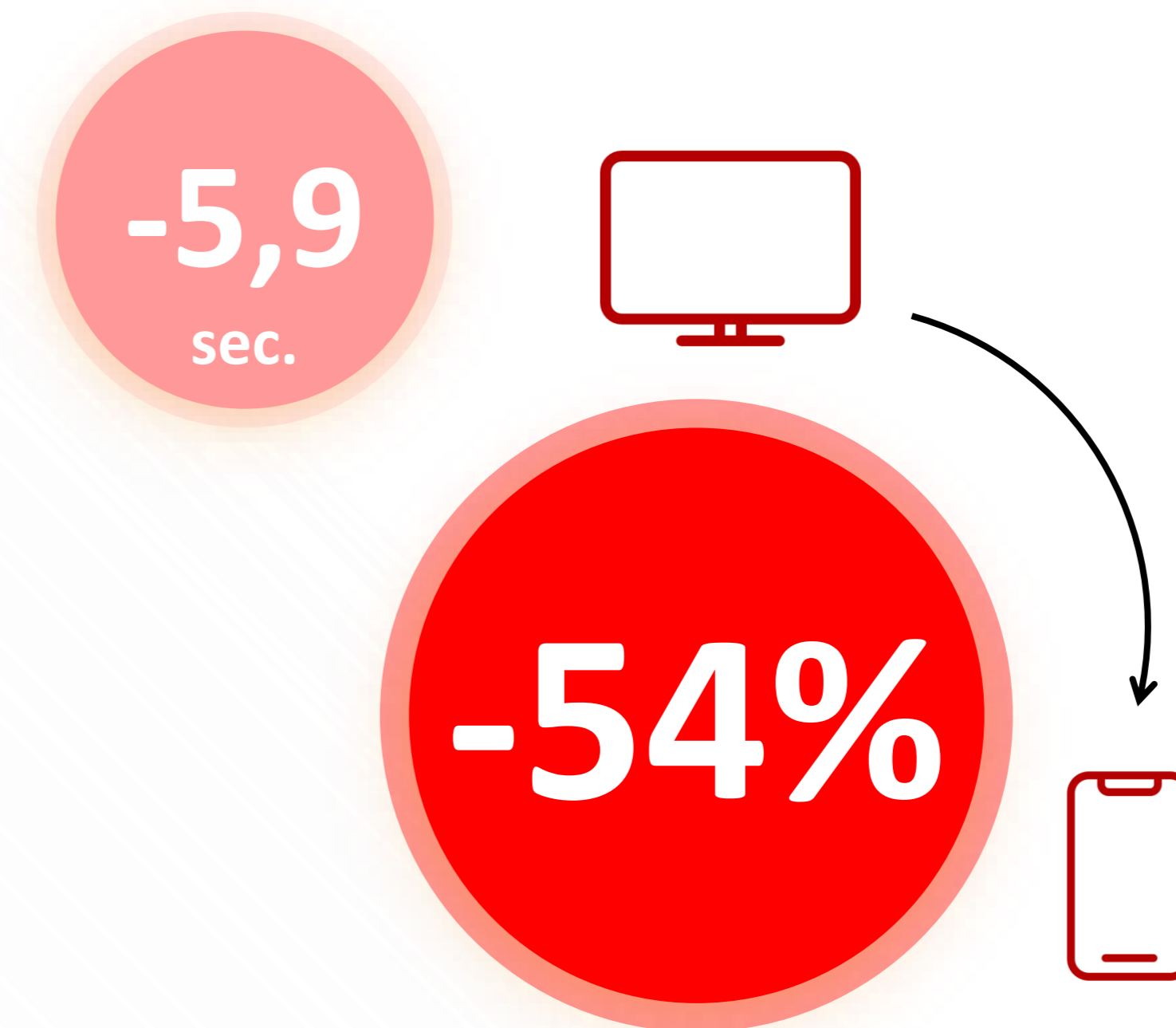
Substantially less attention for YouTube ads on smartphones

Change in visibility and eyes on ad (median) of all video advertising contacts on YouTube.

Change in the visibility
of advertising on YouTube Mobile



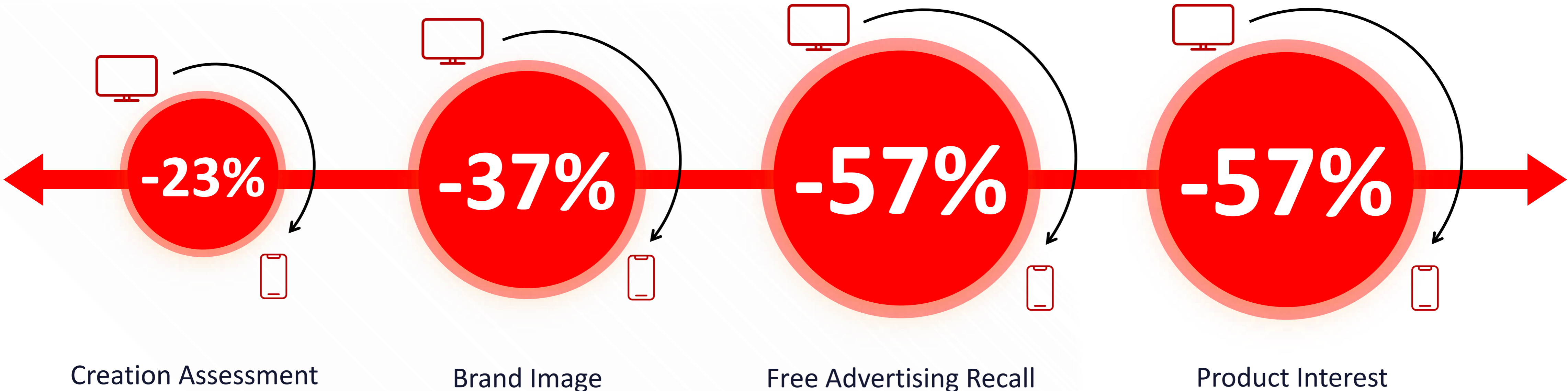
Change in the viewing time
of advertising on YouTube Mobile



YouTube shows screen effects in advertising impact

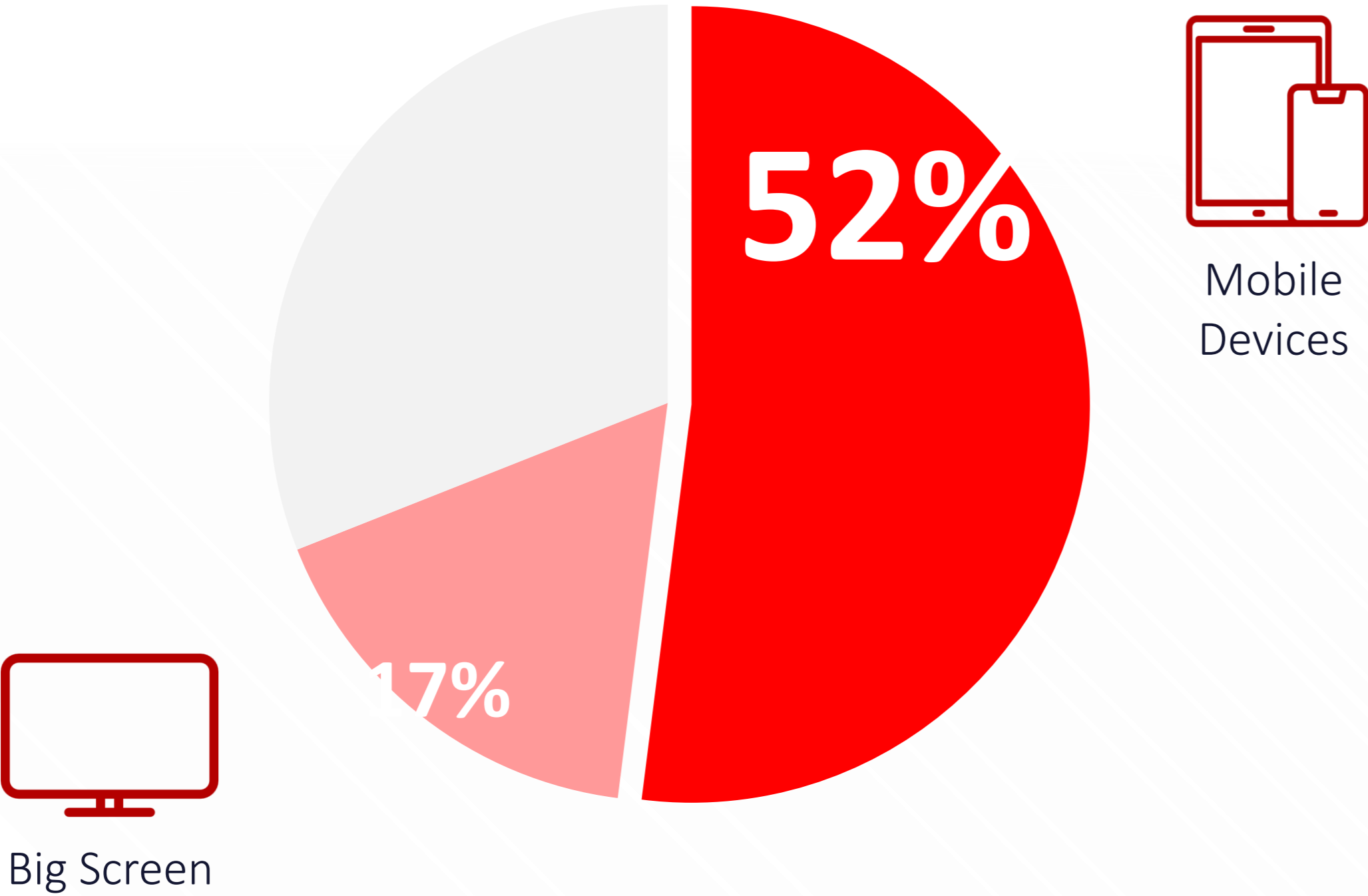
Advertising impact reductions from YouTube Big Screen to Small Screen in %.

Effectiveness reductions for ad impact KPIs
on YouTube Mobile



Small screens remain the norm for YouTube

Proportion of daily minutes on YouTube by used device in %.



Distribution of
YouTube usage by devices



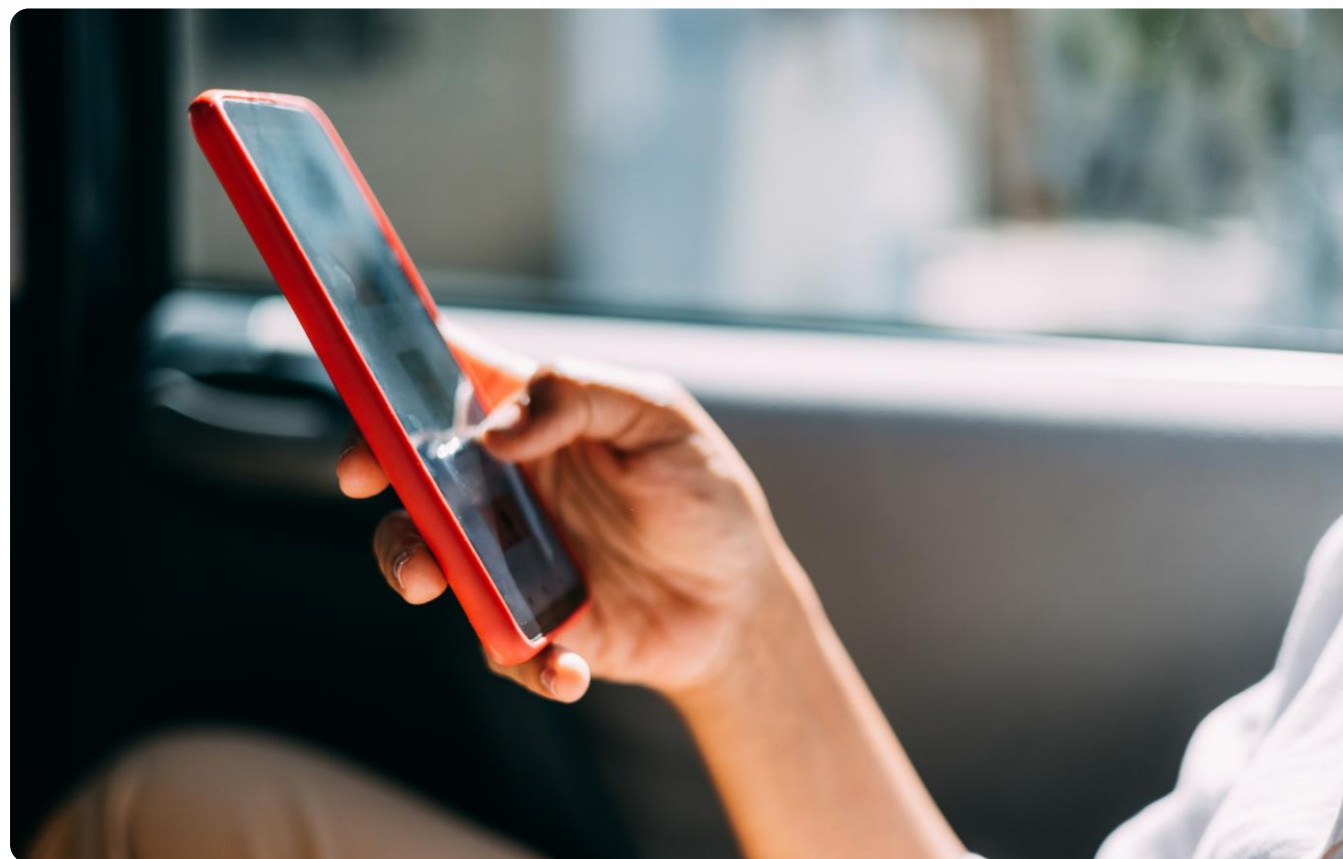
Low ad acceptance and small screen reduce YouTube's impact

Perception effects and impact factors for advertising on YouTube



Advertising is particularly annoying on YouTube

- › Delivered as pre-rolls, ads interrupt the media experience
- › Advertising stands in the way and annoys users
- › The majority of advertising is skippable, and this is done willingly and frequently



Small effects on small screens

- › YouTube Mobile is the usage reality, i.e. smaller screen, upright and more often without sound
- › Attention to advertising drops by half on smartphones
- › Advertising works noticeably worse on small screens: up to 57% reduction in effectiveness

07

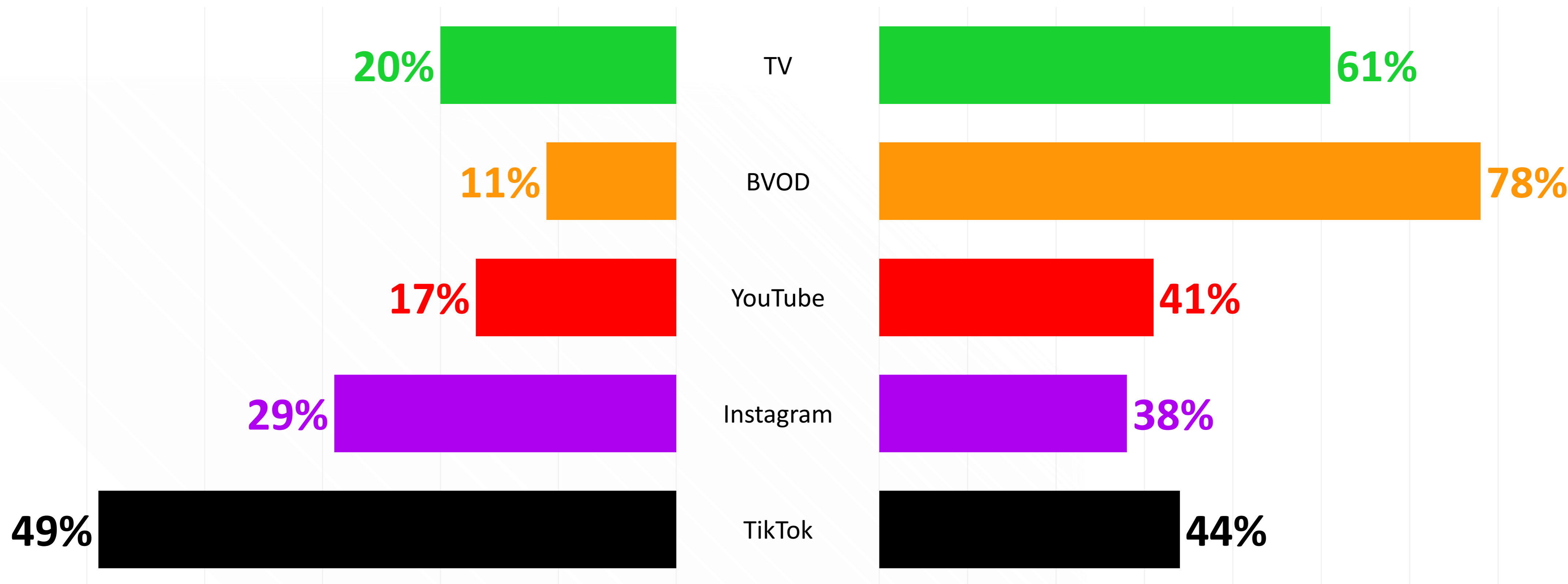
Deep Dive BVOD

BVOD as a mindful time-out: concentrated and relaxed watching

Agreement with the experience of the content viewed (top2) per platform in %.

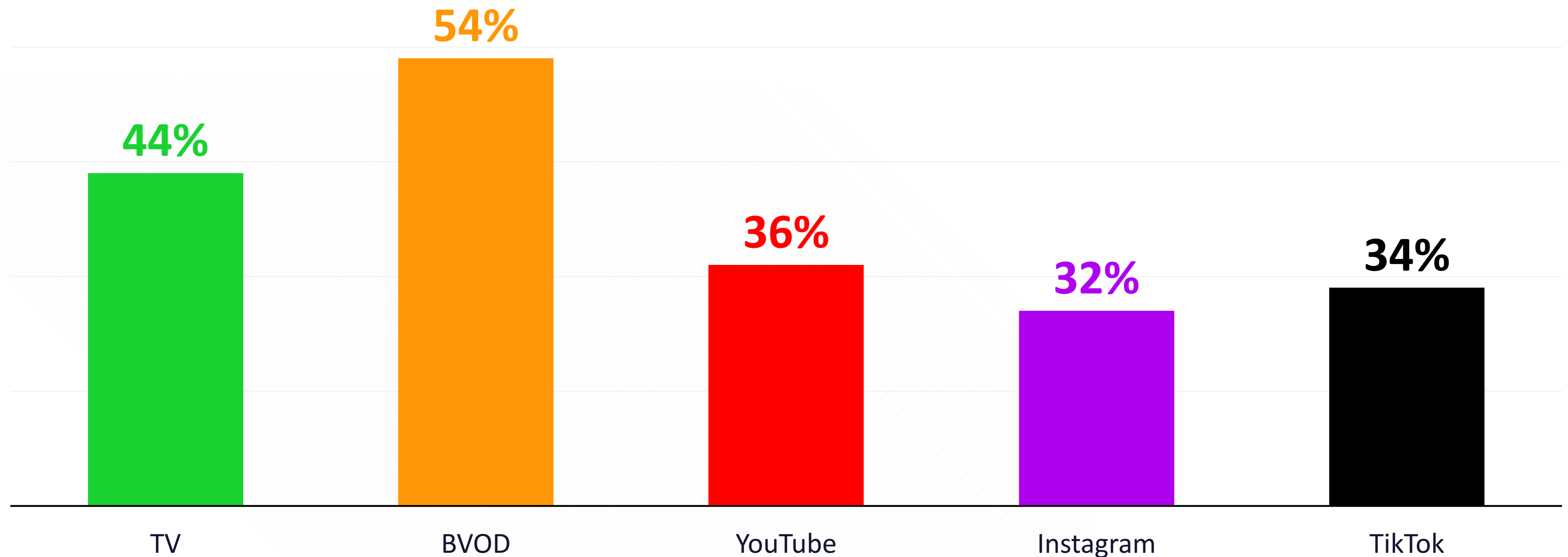
“I found the content here to be hectic.”

“I found the content here to be relaxing.”



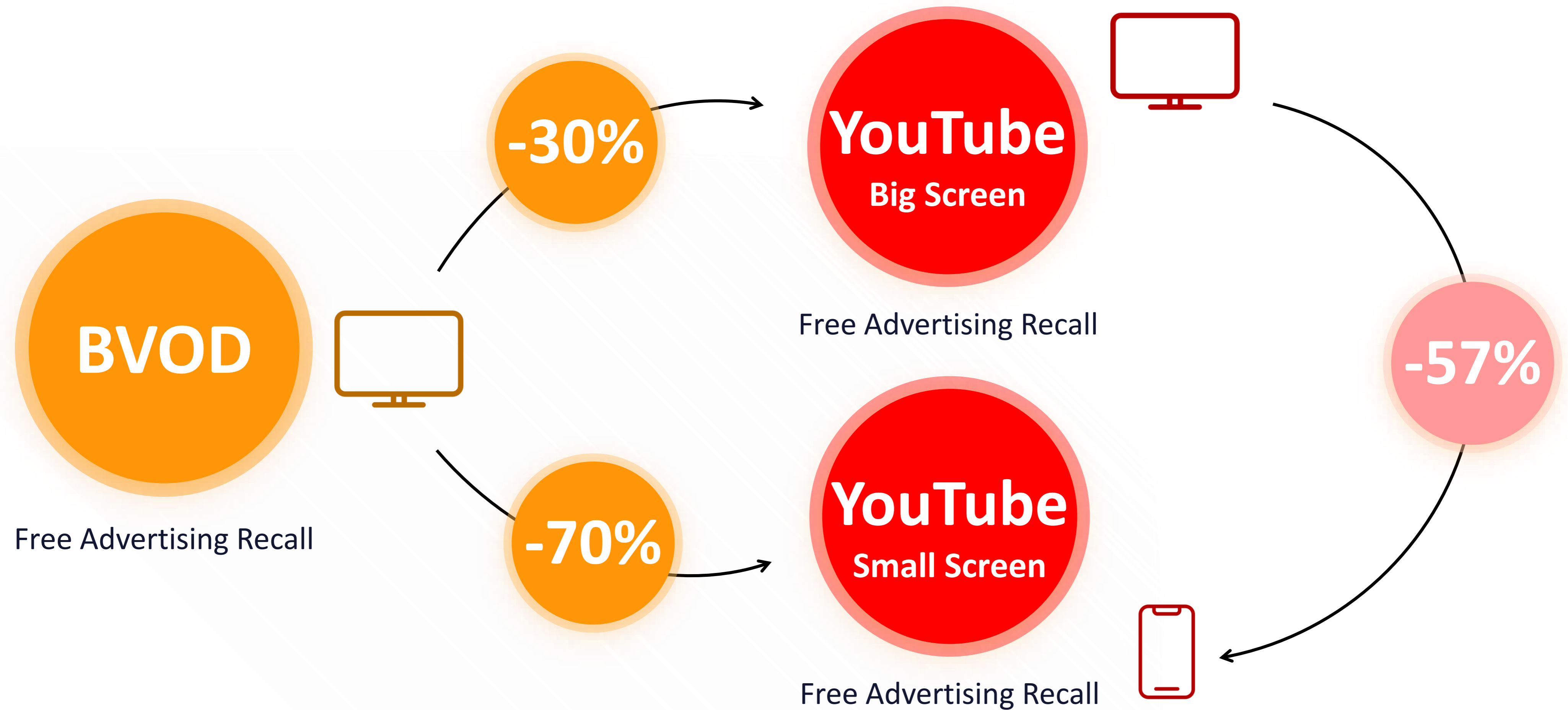
BVOD and TV advertising are also rated best

Overall rating of creations per platform (average of 9 top2 items) in %.



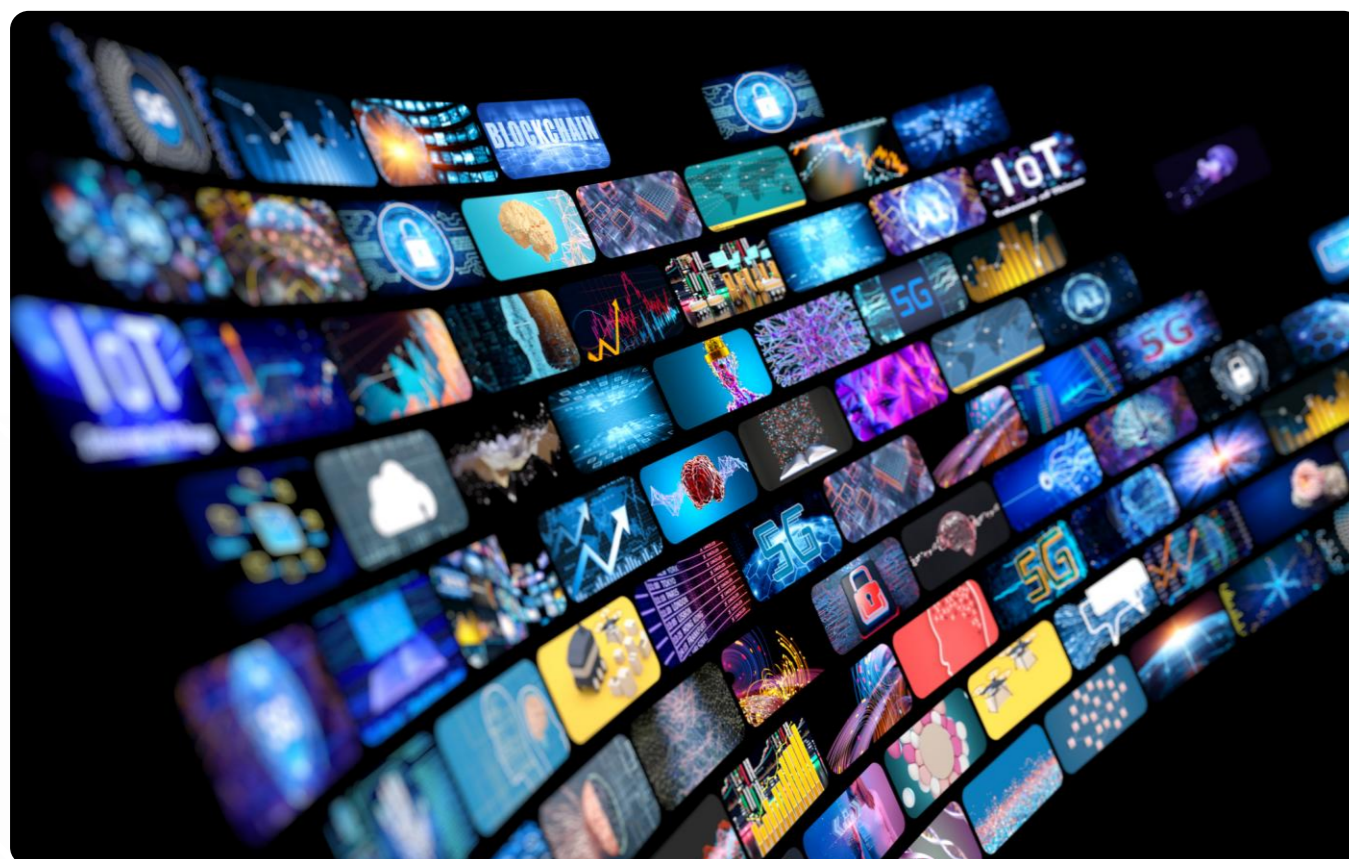
BVOD recall higher than YouTube on the big screen

Free advertising recall for BVOD compared to YouTube Big Screen and Small Screen.



BVOD combines lean-back attitude with good advertising exposure

Perception effects and impact factors for advertising on BVOD.



Media experience: The best of both worlds

- High-quality environment through TV content, but also flexibility and freedom to watch at the convenient time
- High acceptance through learned TV advertising and low ad load at the same time (exclusive brand presence)



Advertising formats: High-quality and memorable

- Pre- and mid-rolls in short commercial blocks
- Always non-skippable
- Always full-screen
- Always with good sound

08

Summary and Conclusion

Summary: There is no single success factor

BVOD

- Optimal interplay of high-quality content and low ad load
- Usage behavior with high attention ensures the best recall

TV

- Professional content with best advertising acceptance despite high ad load
- Very good memory, best recall of details and highest interest

YouTube

- Attention and advertising recall between TV/BVOD and social media
- Low advertising acceptance and loss of impact on mobile devices

TikTok

- Much, short and fast: attention is generally rare here; therefore bad recall
- But ad load and activation are slightly better than on Instagram

Instagram

- Most personalized and diverse content: excited and fast usage
- Highest ad pressure, shortest attention, lowest recall

The advertising impact is determined by the usage situation.

Usage situation is the interplay of many individual variables.

**SCREEN
FORCE**
THE MAGIC OF TOTAL VIDEO





THE MAGIC OF TOTAL VIDEO