THE ANATOMY OF A VIDEO EXPERIENCE
THE VIDEO DEVICE LANDSCAPE IS FRAGMENTED...

IN FACT, THE AVERAGE U.S. HOME OWNS OVER 10 DEVICES*

* Source: MAGNA’s US Media Access Quarterly, Q2 2019
WE WANTED TO UNDERSTAND THE NUANCES OF A VIDEO SESSION TO HELP ADVERTISERS PLAN ACROSS DEVICES
OUR QUESTIONS

1. What are the motivations behind when and why consumers watch video on specific devices?

2. How receptive are consumers to advertising by device? Does attention to the video vary by device?

3. How can advertisers optimize across devices for future planning?
METHODOLOGY / DAY BY DAY VIDEO DIARIES

METHODOLOGY

Tracked the natural nuances of video experiences across devices via online diaries
- Over-the-Top (OTT)
- Linear TV (LTV)
- PC
- Mobile

OTT devices include: Chromecast, Roku, internet-connected Blu-ray player, internet-connected gaming console, etc.

THE 5 W’S OF VIDEO CONSUMPTION

| WHY? | Motivations for watching video and selection of video device |
| WHAT | Video content type and specific genre chosen to watch, as well as how the selection was made |
| WHEN | Time of day and day of week video content was viewed |
| WHERE | Everything associated with environment, including location, co-viewing, other activities |
| WHO | General population, ethnicity/race, generation, music savvy consumers, etc. |

SAMPLE

Nationally representative online panel, with representative weekend and weekday diary entries. Offered in English and Spanish

Sample Size N=3,500
- General Population n=2,000
- Multi-cultural Booster n=1,500

Tracked Video Sessions N=9,613
- General Population n=5,530
- Multi-cultural Booster n=4,083
THE DEVICES

OVER-THE-TOP (OTT)
Any streaming video on a television set, including video streamed through smart TVs and OTT

LINEAR TV (LTV)
Traditional linear, non-digital video on a television set

MOBILE
Smartphone or tablet

PC
Desktop or laptop
WHAT WAS TRACKED

VIDEO LIFECYCLE FROM INCEPTION TO CONSUMPTION

START

TIME OF DAY

PURPOSE

DEVICE MOTIVATION

VIDEO DISCOVERY

CONTENT TYPE

SESSION LENGTH

MOOD

MULTI-TASKING

ENGAGEMENT

END
Of all Gen Pop video sessions, 34% were on OTT.

34% OTT

20% PC

6% LINEAR TV

40% MOBILE

DEVICE MAKEUP OF VIDEO DIARIES

DEVICE COMPOSITION | % OF VIDEO SESSIONS

Of all Gen Pop video sessions, 34% were on OTT.
ON WEEKDAYS, VIDEO CONSUMPTION NATURALLY PEAKS AFTER-WORK HOURS

WEEKDAY DEVICE USAGE BY HOUR | % INCIDENCE

- OTT
- Linear TV
- Mobile
- PC

Video on digital devices are more sustained throughout the day than linear TV.

Of all OTT users, 10% are watching video at 9:00 PM.
ON WEEKENDS, VIDEO ON ALL DEVICES ARE CONSISTENT THROUGHOUT THE DAY

WEEKEND DEVICE USAGE BY HOUR | % INCIDENCE

<table>
<thead>
<tr>
<th>OTT</th>
<th>Linear TV</th>
<th>Mobile</th>
<th>PC</th>
</tr>
</thead>
</table>

Q: Yesterday, which time(s) did you begin a video playing session on these device(s)? Select all that apply for each option.
THE MOTIVATION BEHIND THE DEVICE

WHICH DEVICE IS CHOSEN + WHY
MOST DON’T HAVE A “GO-TO” DEVICE, NOT EVEN MOBILE

Advertisers need to be thoughtful with how they plan on each device, given vast majority of device decisions are situational.

**MOTIVATION FOR DEVICE SELECTION BY DEVICE**

- **OTT**: 23% (It’s my go to device) 77% (Total other reasons)
- **Linear TV**: 19% (Total other reasons) 81%
- **Mobile**: 21% (Total other reasons) 79%
- **PC**: 19% (Total other reasons) 81%

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)
Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
DEVICE SELECTION IS COMPLICATED

There’s a lot of variety in why people chose a specific video device.

BREAKDOWN | MOTIVATION FOR DEVICE SELECTION BY DEVICE

- It’s my go-to device
- Total other reasons

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
QUALITY IS PRIORITY WHEN CHOOSING OTT

MOTIVATION FOR SELECTING OTT | % OF OTT VIDEO SESSIONS (REBASED*)

#1 It has the highest video/audio quality 19%
It is easier to watch/listen with others 15%
I knew I would find the video 15%
It is the only way I could access 14%
It offers a wide selection 14%
I had it with me at the time 14%
Someone else chose the device 7%
Other 3%

*Rebased without "It's my go-to device"
Gen Pop video diaries n=5,530 (OTT n=1,792)
Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
**LIMITED OPTIONS FOR DESIRED CONTENT DRIVES**

**LTV SELECTION**

**MOTIVATION FOR SELECTING LINEAR TV | % OF LINEAR TV VIDEO SESSIONS (REBASED*)**

<table>
<thead>
<tr>
<th>Reason</th>
<th>% of Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is the only way I could access</td>
<td>21%</td>
</tr>
<tr>
<td>It has the highest video/audio quality</td>
<td>18%</td>
</tr>
<tr>
<td>I had it with me at the time</td>
<td>17%</td>
</tr>
<tr>
<td>I knew I would find the video</td>
<td>15%</td>
</tr>
<tr>
<td>Someone else chose the device</td>
<td>11%</td>
</tr>
<tr>
<td>It is easier to watch/listen with others</td>
<td>9%</td>
</tr>
<tr>
<td>It offers a wide selection</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Rebased without “It’s my go-to device”

Gen Pop video diaries n=5,530 (Linear TV n=304)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
MOBILE IS MOST LIKELY CHOSEN FOR IT’S ACCESSIBILITY

MOTIVATION FOR SELECTING MOBILE | % OF MOBILE VIDEO SESSIONS (REBASED*)

1. I had it with me at the time 43%
2. It is the only way I could access 15%
3. I knew I would find the video 12%
4. It has the highest video/audio quality 9%
5. It offers a wide selection 9%
6. It is easier to watch/listen with others 7%
7. Someone else chose the device 2%
8. Other 4%

*Rebased without "It’s my go-to device"
Gen Pop video diaries n=5,530 (Mobile n=2,165)
Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
**PC PROVIDES BEST OF BOTH WORLDS**

PC offers accessibility, and compared to mobile, quality is a close second.

**MOTIVATION FOR SELECTING PC | % OF PC VIDEO SESSIONS (REBASED*)**

1. *I had it with me at the time* 25%
2. *It has the highest video/audio quality* 18%
3. *I knew I would find the video* 14%
4. *It offers a wide selection* 13%
5. *It is the only way I could access* 13%
6. *It is easier to watch/listen with others* 9%
7. *Someone else chose the device* 5%
8. *Other* 4%

*Rebased without “It’s my go-to device”
Gen Pop video diaries n=5,530 (PC n=1,068)
Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
DIFFERENT FACTORS IMPACT MOTIVATIONS FOR CHOOSING EACH DEVICE

Drivers of device selection motivation

<table>
<thead>
<tr>
<th>Device</th>
<th>Purpose*</th>
<th>Time of Day</th>
<th>Co-viewership</th>
<th>Location</th>
<th>Multi-Tasking</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTT</td>
<td>(151.2)</td>
<td>(154.6)</td>
<td>(140.5)</td>
<td></td>
<td>(156.6)</td>
</tr>
<tr>
<td>Linear TV</td>
<td>(151.2)</td>
<td>(154.6)</td>
<td></td>
<td></td>
<td>(140.2)</td>
</tr>
<tr>
<td>Mobile</td>
<td></td>
<td></td>
<td></td>
<td>(154.0)</td>
<td>(140.2)</td>
</tr>
<tr>
<td>PC</td>
<td>Video Genre</td>
<td>Multi-Tasking</td>
<td></td>
<td></td>
<td>(123.0)</td>
</tr>
</tbody>
</table>

Whether consumers are multi-tasking has the greatest impact on motivations to use OTT

*Purpose includes: to unwind, to spend time with others, to learn something new, etc.

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)
Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one
**MULTI-TASKERS CHOOSE OTT FOR CONTENT VARIETY; FOCUSED VIEWERS ARE DRIVEN BY SPECIFIC VIDEO**

When multi-tasking, people are passively searching for content. While those who aren’t multi-tasking are actively searching, they have a specific video in mind.

**MOTIVATION FOR DEVICE SELECTION BY MULTI-TASKING | OTT | % OF VIDEO SESSIONS**

<table>
<thead>
<tr>
<th>MOTIVATION FOR DEVICE SELECTION</th>
<th>Multi-Tasking*</th>
<th>Not Multi-Tasking</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's my go-to device</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>It has the highest video/audio quality</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>It offers a wide selection of content</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>It's easier to watch or listen with others</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>I had it with me at the time</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>It's the only way I could access the content I wanted to watch</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>I knew I would find the video I'm looking for</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Someone else chose the device</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

* Multi-tasking activities include: pursuing hobbies, running errands, cooking, shopping, socializing, commuting, working, browsing online on a different device, browsing online on the same device Gen Pop video diaries n=5,530 (OTT n=1,792)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
LTV IS CHOSEN FOR EXCLUSIVE OPTIONS IN THE MORNING, SOCIALIZING IN THE EVENING

Advertisers can reach co-viewers on LTV in the evening.

**MOTIVATION FOR DEVICE SELECTION BY DAY PART | LINEAR TV | % OF VIDEO SESSIONS**

<table>
<thead>
<tr>
<th>MOTIVATION FOR DEVICE SELECTION</th>
<th>LINEAR TV</th>
<th>% OF VIDEO SESSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's my go-to device</td>
<td>21%</td>
<td>Morning</td>
</tr>
<tr>
<td>It has the highest video/audio quality</td>
<td>20%</td>
<td>Afternoon</td>
</tr>
<tr>
<td>It offers a wide selection of content</td>
<td>21%</td>
<td>Evening</td>
</tr>
<tr>
<td>It's easier to watch or listen with others</td>
<td>16%</td>
<td>Night</td>
</tr>
<tr>
<td>I had it with me at the time</td>
<td>13%</td>
<td>Morning</td>
</tr>
<tr>
<td>It's the only way I could access the content I wanted to watch</td>
<td>23%</td>
<td>Afternoon</td>
</tr>
<tr>
<td>I knew I would find the video I'm looking for</td>
<td>23%</td>
<td>Evening</td>
</tr>
<tr>
<td>Someone else chose the device</td>
<td>15%</td>
<td>Night</td>
</tr>
</tbody>
</table>

Gen Pop video diaries n=5,530 (Linear TV n=304)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
MOBILE IS CHOSEN OUT OF ACCESSIBILITY BOTH IN AND OUT OF THE HOME

**MOTIVATION FOR DEVICE SELECTION BY LOCATION | MOBILE | % OF VIDEO SESSIONS**

<table>
<thead>
<tr>
<th>Location</th>
<th>Home</th>
<th>Out and about*</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's my go-to device</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>It has the highest video/audio quality</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>It offers a wide selection of content</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>It's easier to watch or listen with others</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>I had it with me at the time</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>It's the only way I could access the content I wanted to watch</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>I knew I would find the video I'm looking for</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Someone else chose the device</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Out and about locations include: restaurant or bar, store, school, gym, work, commuting, vacation

Gas Pop video diaries n=5,530 (Mobile n=2,165)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
PEOPLE OPT FOR PC FOR ENTERTAINING VIDEOS; FOR INFORMATIVE, PC IS THE MOST CONVENIENT

However, people watching music content in particular choose to watch on mobile because they knew they would find the specific content.

**MOTIVATION FOR DEVICE SELECTION BY CONTENT GENRE | PC | % OF VIDEO SESSIONS**

<table>
<thead>
<tr>
<th>Music</th>
<th>Entertaining*</th>
<th>Informative**</th>
</tr>
</thead>
<tbody>
<tr>
<td>It's my go-to device</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>It has the highest video/audio quality</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>It offers a wide selection of content</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>It's easier to watch or listen with others</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>I had it with me at the time</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>It's the only way I could access the content I wanted to watch</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>I knew I would find the video I'm looking for</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Someone else chose the device</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), Sports, True Crime
**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational

Gen Pop video diaries n=5,530 (PC n=1,068)

Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.
TAKEAWAYS ON DEVICE MOTIVATION

1. Multi-tasking is the strongest driver in motivations to choose OTT. Multi-taskers choose OTT for content variety as they browse, while focused viewers choose it with a specific video in mind.

2. Time of day is the strongest driver in motivations to choose linear TV. People opt for LTV for exclusive content earlier in the day, and for social purposes in the evening.

3. Location is the strongest driver in motivations to watch on mobile. However, mobile is most likely chosen out of accessibility whether or not they’re in or out of the home.

4. Content genre is the strongest driver in motivations to choose PC. It’s more likely a go-to device for entertaining genres and the most convenient for informative genres.
VIDEO FROM INCEPTION TO CONSUMPTION
**RELAXATION ON BIGGER SCREENS, TASKS ON PC**

Leverage need state targeting by aligning creative with consumer mindset.

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>% OF VIDEO SESSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>OTT</td>
</tr>
<tr>
<td>TO UNWIND</td>
<td>51%</td>
</tr>
<tr>
<td>TO KILL TIME</td>
<td>25%</td>
</tr>
<tr>
<td>TO KEEP UP WITH WHAT'S GOING ON</td>
<td>14%</td>
</tr>
<tr>
<td>TO CHEER UP</td>
<td>14%</td>
</tr>
<tr>
<td>TO SPEND TIME WITH OTHERS</td>
<td>19%</td>
</tr>
<tr>
<td>TO GET OTHER TASKS DONE</td>
<td>13%</td>
</tr>
<tr>
<td>TO LEARN SOMETHING NEW</td>
<td>12%</td>
</tr>
</tbody>
</table>

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)

Q: Which of the following describe why you played video during your video session on a [device] that began yesterday at [time]? Select all that apply.
NATURALLY, CONTENT GENRE ALIGNS WITH PURPOSE

Use content genre to target people with a task-based mindset.

CONTENT GENRE | INDEXED TO CATEGORY AVERAGE (100)

- OTT
- Linear TV
- Mobile
- PC

More music consumption is happening on digital devices, but there’s a lot more music content being watched on OTT than expected.

- Music: Indexed to Music average (100)
  - OTT: 142, Linear TV: 161, Mobile: 93, PC: 21
  - Indexed to Music average (100): 95

- Sports: Indexed to Sports average (100)
  - OTT: 63, Linear TV: 83, Mobile: 93, PC: 95
  - Indexed to Sports average (100): 85

- Entertaining: Indexed to Entertaining average (100)

- Informative: Indexed to Informative average (100)
  - OTT: 85, Linear TV: 96, Mobile: 96, PC: 85

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime

**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)

Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?
**DESPITE OTT BEING HAILED AS LEAN-FORWARD, MORE PASSIVE SEARCH THAN OTHER DIGITAL DEVICES**

**Content Providers:** Ensure good content discovery options on OTT.

**Brands:** Consider OTT sponsorships that assist with content discovery.

**PASSIVE VIDEO DISCOVERY | % OF VIDEO SESSIONS**

<table>
<thead>
<tr>
<th></th>
<th>OTT</th>
<th>Linear TV</th>
<th>Mobile</th>
<th>PC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passive Discovery: I scrolled through a feed or home page, I scrolled through a channel guide, I flipped through the channels one by one, It was already playing Gen Pop video diaries n=6,520 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>24%</td>
<td>42%</td>
<td>16%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q: How did you find the video(s) that you played during your video session on a [device] that began yesterday at [time]? Select one.
SIGNIFICANT Bingeing on OTT and LTV

Explore frequency windowing & ad sequencing.

SESSION LENGTH & BINGE VIEWING | % OF VIDEO SESSIONS

- OTT
- Linear TV
- Mobile
- PC

- < 30 MINS
  - OTT: 20%
  - Linear TV: 12%
  - Mobile: 32%
  - PC: 39%

- 30 - 59 MINS
  - OTT: 37%
  - Linear TV: 45%
  - Mobile: 36%
  - PC: 36%

- > 1 HOUR
  - OTT: 42%
  - Linear TV: 43%
  - Mobile: 26%
  - PC: 32%

MULTIPLE VIDEOS FROM THE SAME SERIES, CONTENT CREATOR, OR CHANNEL

- 42%
- 52%
- 31%
- 32%

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)

Q: How long were you playing video during your video session on a [device] that began yesterday at [time]? Select one.

Q: You indicated that you played more than one video during your video session on a [device] that began yesterday at [time]. What types of videos did you play at this time? Select one.
LINEAR TV USERS
MULTI-TASK BY BROWSING ON DIGITAL

Explore planning simultaneous cross-screen exposure.

MULTI-TASKING BY “BROWSING ON ANOTHER DEVICE” | % OF VIDEO SESSIONS

- OTT
- Linear TV
- Mobile
- PC

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)

Q: What were you doing during your video session on a [device] that began yesterday at [time]? Select all that apply.
 REGARDLESS OF DEVICE, EARS ARE PLAYING MORE ATTENTION THEN EYES

Create video ads that are able to stand alone on audio.

ATTENTION TO CONTENT | % OF VIDEO SESSIONS

☐ OTT ☐ Linear TV ☐ Mobile ☐ PC

<table>
<thead>
<tr>
<th>Device</th>
<th>Full Attention to Visual</th>
<th>Full Attention to Audio</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTT</td>
<td>44%</td>
<td>54%</td>
</tr>
<tr>
<td>Linear TV</td>
<td>39%</td>
<td>50%</td>
</tr>
<tr>
<td>Mobile</td>
<td>42%</td>
<td>52%</td>
</tr>
<tr>
<td>PC</td>
<td>43%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Q: How much attention did you pay to the visual component of the video(s) you played during your video session on a [device] that began yesterday at [time]?
Q: How much attention did you pay to the audio component of the video(s) you played during your video session on a [device] that began yesterday at [time]?

Attention to audio is similarly high for music.

Gen Pop video diaries n=5,530 (OTT n=1,792, Linear TV n=304, Mobile n=2,165, PC n=1,068)
People have relaxation in mind when watching on bigger screens, and utility when on PC.

Surprisingly, there’s more passive search discovery happening on OTT than digital devices.

Linear TV users are more likely to multi-task on a different device, providing an opportunity for cross-screen exposure.

Regardless of device, people are paying more attention to audio, than visual.
SPOTLIGHT ON CO-VIEWERSHIP
WITH AN EMPHASIS ON OTT
OTT IS WHERE IT’S AT FOR CO-VIEWERS

DEVICE SELECTED VIDEO SESSIONS | % OF CO-VIEWING

- OTT: 49%
- Linear TV: 27%
- Mobile: 18%
- PC: 7%
- PC: 18%

Q: Which of the following devices did you use to play video yesterday? Select all that apply.
CO-VIEWING IS INTENTIONAL QUALITY TIME RATHER THAN TIME TO PASS

PURPOSE BY CO-VIEWERSHIP | % OF VIDEO SESSIONS
--- | ---
Co-Viewers | Solo Viewers

Q: Which of the following describe why you played video during your video session on a [device] that began yesterday at [time]? Select all that apply.
CO-VIEWERS ARE WATCHING A WIDE VARIETY OF CONTENT

Advertisers should focus creative on themes that appeal to wider audiences.

CONTENT GENRE BY CO-VIEWERSHIP | INDEXED TO CATEGORY AVERAGE (100)

<table>
<thead>
<tr>
<th>Genre</th>
<th>Co-Viewers</th>
<th>Solo Viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>108</td>
<td>92</td>
</tr>
<tr>
<td>Sports</td>
<td>121</td>
<td>79</td>
</tr>
<tr>
<td>Entertaining</td>
<td>106</td>
<td>94</td>
</tr>
<tr>
<td>Informative</td>
<td>107</td>
<td>93</td>
</tr>
</tbody>
</table>

Indexed to Music average (100)
Indexed to Sports average (100)
Indexed to Entertaining average (100)
Indexed to Informative average (100)

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
*Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
Co-viewing video diaries n=2,138, Solo viewing diary entries n=3,393
Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?
CO-VIEWERS WATCH VIDEO FOR LONGER, LIKELY BECAUSE IT’S INTENTIONAL

Consider frequency windowing and ad sequencing when co-viewing is likely.

SESSION LENGTH BY CO-VIEWERSHIP | % OF VIDEO SESSIONS

- Co-Viewers
- Solo Viewers

- < 30 MINS
  - Co-Viewers: 24%
  - Solo Viewers: 33%

- 30 - 59 MINS
  - Co-Viewers: 36%
  - Solo Viewers: 38%

- > 1 HOUR
  - Co-Viewers: 41%
  - Solo Viewers: 29%
CO-VIEWING MEANS OPENNESS TO ADS

While co-viewers pay equal attention to the content as solo viewers, ad receptivity is higher.

**ATTENTION TO THE CONTENT & AD RECEPTIVITY BY CO-VIEWERSHIP | % OF VIDEO SESSIONS**

- Co-Viewers
- Solo Viewers

<table>
<thead>
<tr>
<th>ATTENTION TO AUDIO + VISUAL (TB)</th>
<th>38%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-Viewers</td>
<td>39%</td>
</tr>
<tr>
<td>Solo Viewers</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AD RECEPTIVITY (TB)</th>
<th>62%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-Viewers on OTT</td>
<td>47%</td>
</tr>
<tr>
<td>Solo Viewers on OTT</td>
<td></td>
</tr>
</tbody>
</table>

Co-viewing video diaries n=2,138, Solo viewing diary entries n=3,393

Q: How much attention did you pay to the visual component of the video(s) you played during your video session on a [device] that began yesterday at [time]?

Q: How much attention did you pay to the audio component of the video(s) you played during your video session on a [device] that began yesterday at [time]?

Q: During your video session on a [device] that began yesterday at [time], how open would you have been to the following ad formats?
CO-VIEWERS ARE ESPECIALLY ATTENTIVE ON OTT

While co-viewers pay equal attention to content as solo-viewers, co-viewers are even more attentive when on OTT.

ATTENTION TO THE CONTENT (TB) | OTT CO-VIEWING | % OF VIDEO SESSIONS

| | | |
| | | |
| | | |
| | | |

43% OTT CO-VIEWERS
41% OTT
39% AVG VIDEO SESSION

OTT Co-View n=977, OTT n=1,792
Q: How much attention did you pay to the visual component of the video(s) you played during your video session on a [device] that began yesterday at [time]?
Q: How much attention did you pay to the audio component of the video(s) you played during your video session on a [device] that began yesterday at [time]?
OTT Co-viewers More Open to New Ad Types

Newer ad formats, such as interactive ads, should be considered on OTT.

<table>
<thead>
<tr>
<th>AD RECEPTIVITY (TB)</th>
<th>OTT CO-VIEWING</th>
<th>% OF VIDEO SESSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Static Ads (appears on screen when video is paused)</td>
<td>OTT Co-Viewers</td>
<td>OTT</td>
</tr>
<tr>
<td>Interactive Ads</td>
<td>22%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Q: During your video session on a [device] that began yesterday at [time], how open would you have been to the following ad formats?
Co-viewing is an intentional viewing experience, given purpose and longer watch times.

Though co-viewers are just as attentive as solo viewers, they’re especially attentive on OTT. OTT also happens to be the #1 device choice for co-viewers.

Co-viewing means openness to ads, especially on OTT where they’re open to new ad types like interactive ads and static ads.
WHAT’S UNIQUE ABOUT MUSIC
MUSIC PROVIDES A HIGHLY CULTURALLY RELEVANT EXPERIENCE

Music content is an ideal environment for brands aiming to connect with consumers culturally.

PERCEIVED CULTURAL RELEVANCE OF CONTENT BY GENRE | % OF VIDEO SESSIONS

- Low (0-3)
- Medium (4-6)
- High (7-10)

Music provides a highly culturally relevant experience

Music content is an ideal environment for brands aiming to connect with consumers culturally.

Q: During your video session on a [device] that began yesterday at [time], how culturally relevant were the video(s) to you? Note: Videos that are culturally relevant to you are videos that align well with your personal identity via language, ethnicity, nationality, etc.
MORE HAPPY, LESS TIRED WITH MUSIC VIDEOS

Advertisers can reach consumers in positive moods through music content.

MOOD BY GENRE | % OF VIDEO SESSIONS
Music | Other Video Genres*

RELAXED

HAPPY

TIRED

*Other video genres include: Action, Business, Cooking or Home Design, Comedy, Drama, Family, Gaming, Game/Talk Shows, How-To/Do-It-Yourself, Mystery, News & Politics, Pet or Animal, Reality (e.g. reality shows, personal live streams), Science/Technology/Educational, Sports, True Crime

Music video diary entries n=1,256

Q: Which of the following best describes your mood during your video session on a [device] that began yesterday at [time]? Select one.
YOUTUBE = THE MUSIC VIDEO BINGER’S PLATFORM

Consumers not only watching multiple pieces of content, but are also more exploratory.

BINGE WATCHING ON YOUTUBE (FREE) BY GENRE | % OF VIDEO SESSIONS

<table>
<thead>
<tr>
<th>Music</th>
<th>Other Video Genres</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ 23%</td>
<td>29%</td>
</tr>
<tr>
<td>✔️ 33%</td>
<td>33%</td>
</tr>
<tr>
<td>✔️ 41%</td>
<td>37%</td>
</tr>
</tbody>
</table>

AMOUNT OF VIDEOS I PLAYED...

I BINGE ON MULTIPLE VIDEOS FROM...

- The same series, content creator, or channel: 23%
- The same genre, but different series, content creators, or channels: 33% 33%
- Multiple videos across a variety of genres: 41%

Music video diary entries n=1,256
When targeting music content, ads should tell a story through audio.

**ATTENTION HIGHEST WITH MUSIC CONTENT**

**ATTENTION TO AUDIO BY GENRE | % OF VIDEO SESSIONS**

- Music
- Other Video Genres

Q: How much attention did you pay to the audio component of the video(s) you played during your video session on a [device] that began yesterday at [time]?

Music video diary entries n=1,256.
MUSIC WATCHERS ARE VISUALLY ATTENTIVE ON OTT

Advertisers can rely more on visuals within creative for OTT co-viewers compared to other devices.

<table>
<thead>
<tr>
<th>ATTENTION TO VISUAL (TB) BY GENRE</th>
<th>% OF VIDEO SESSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>37%</td>
</tr>
<tr>
<td>Other Video Genres</td>
<td>43%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ATTENTION TO VISUAL (TB) BY DEVICE</th>
<th>MUSIC GENRE</th>
<th>% OF VIDEO SESSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTT CO-VIEW</td>
<td>Music</td>
<td>42%</td>
</tr>
<tr>
<td>OTT SOLO VIEW</td>
<td>Music</td>
<td>37%</td>
</tr>
<tr>
<td>MOBILE</td>
<td>Music</td>
<td>37%</td>
</tr>
<tr>
<td>PC</td>
<td>Music</td>
<td>35%</td>
</tr>
</tbody>
</table>

Linear TV music video diary entries excluded due to low sample size
Music video diary entries n=1,256 (OTT Co-view n=193, OTT Solo view n=135, Mobile n=580, PC n=285),
Q. How much attention did you pay to the visual component of the video(s) you played during your video session on a [device] that began yesterday at [time]?
**MUSIC + OTT = OPENNESS TO ADS**

### AD RECEPTIVITY (TB) BY DEVICE | MUSIC GENRE | % OF VIDEO SESSIONS

<table>
<thead>
<tr>
<th>Device</th>
<th>Music</th>
<th>All Video Genres</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTT Co-viewing</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>OTT Solo viewing</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Mobile</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>PC</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

People are also somewhat more receptive on PC when watching music.

Linear TV music video diary entries excluded due to low sample size.

Music OTT Co-view n=193, OTT Co-view n=977, Music OTT Solo view n=135, OTT Solo view n=814, Music Mobile n=585, Mobile n=2,165, Music PC n=285, PC n=1,068

Q: During your video session on a [device] that began yesterday at [time], how open would you have been to the following ad formats?
Music is an uplifting video genre—people are more happy and less tired when watching music than other video genres.

When people are watching music content, they’re often binging across a variety of genres on YouTube.

Unsurprisingly, music watchers are highly attentive to audio. However, visual attention is especially important on OTT.

People are especially receptive to ads when watching music content on OTT.
DEVICE SELECTION AND USAGE IS NUANCED.
THE SAME SHOULD GO FOR THE ADVERTISER APPROACH.
WHAT TO DO ON ANY DEVICE

THE MINDSET
Consumers are in vastly different mindsets on each video device, so brands should consider aligning creative to match it.

THE CONTENT
Use content type to align with purpose. They naturally align, giving advertisers an additional trigger outside device to target relevant ads.

THE ENGAGEMENT
The music genre is king when it comes to positive moods, cultural relevance, and openness to ads. Consider advertising on music video while ensuring ads have a strong audio focus. However, don’t forget about visuals on OTT where they’re particularly important.

THE ENVIRONMENT
Co-viewing is all it’s cracked up to be. It’s intentional viewing for longer sessions with an audience open to ads.
WHAT TO DO ON BIGGER SCREENS...

OTT

- Explore frequency windowing and sequential storytelling given longer watch times
- Newer ad formats, such as interactive ads and static ads, should be considered
- Consider focusing creative on themes of family and community, when relevant
- OTT content providers should ensure good content discovery options
- Brands should look into OTT sponsorships assisting with content discovery
- OTT should be used to target co-viewers

LINEAR TV

- Advertisers should leverage needs state targeting, given LTV users’ relaxation purpose
- Plan for simultaneous, cross-device exposures given device-based multi-tasking
WHAT TO DO ON SMALLER SCREENS...

PC
- Consider prioritizing utility in ads on PC
- Targeting music content should be considered given high ad receptivity

MOBILE
- Because video sessions are shorter, brands should design their creative to tell a story through a single exposure
- Creative should standalone on audio