



THE ANATOMY OF A VIDEO EXPERIENCE

M/GNA

IPG MEDIA LAB

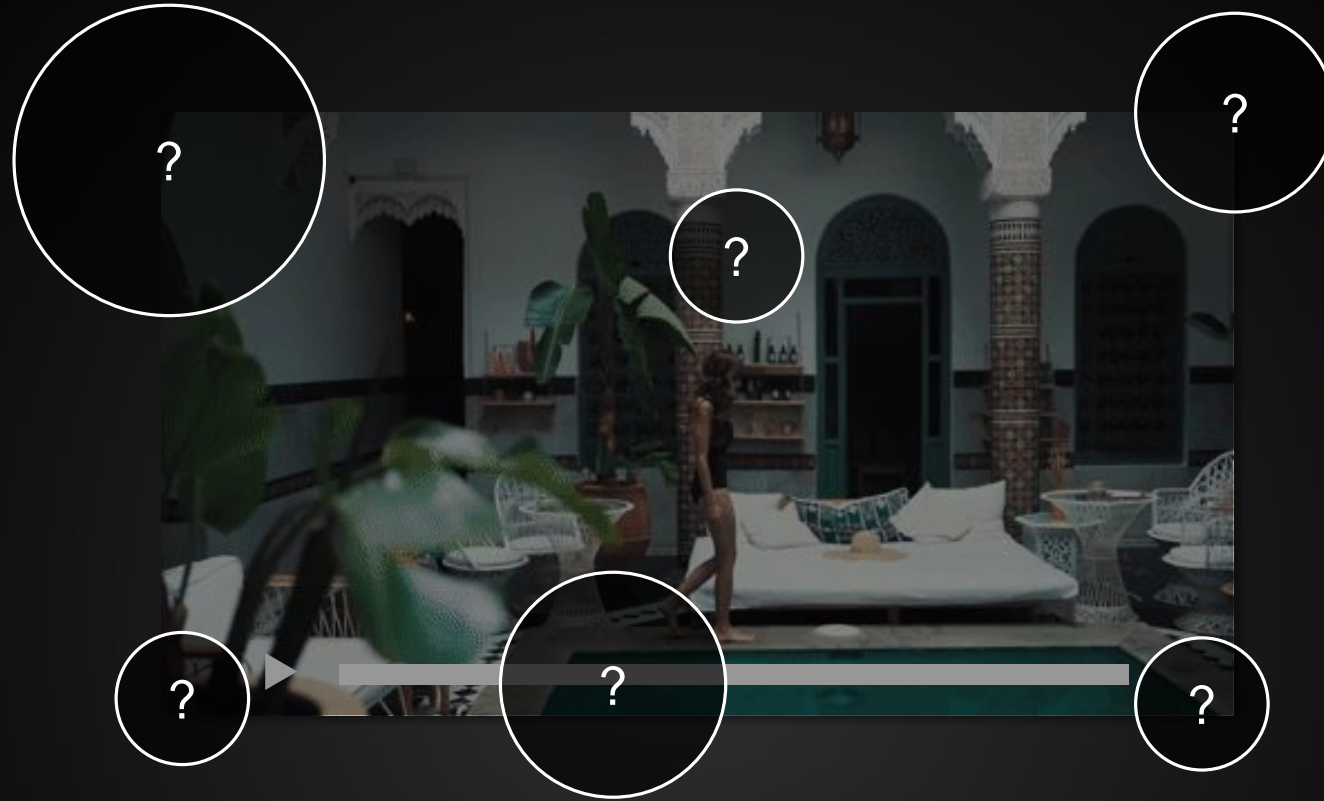
vevo

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



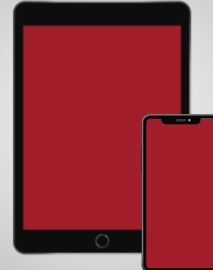
OVER-THE-TOP (OTT)

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

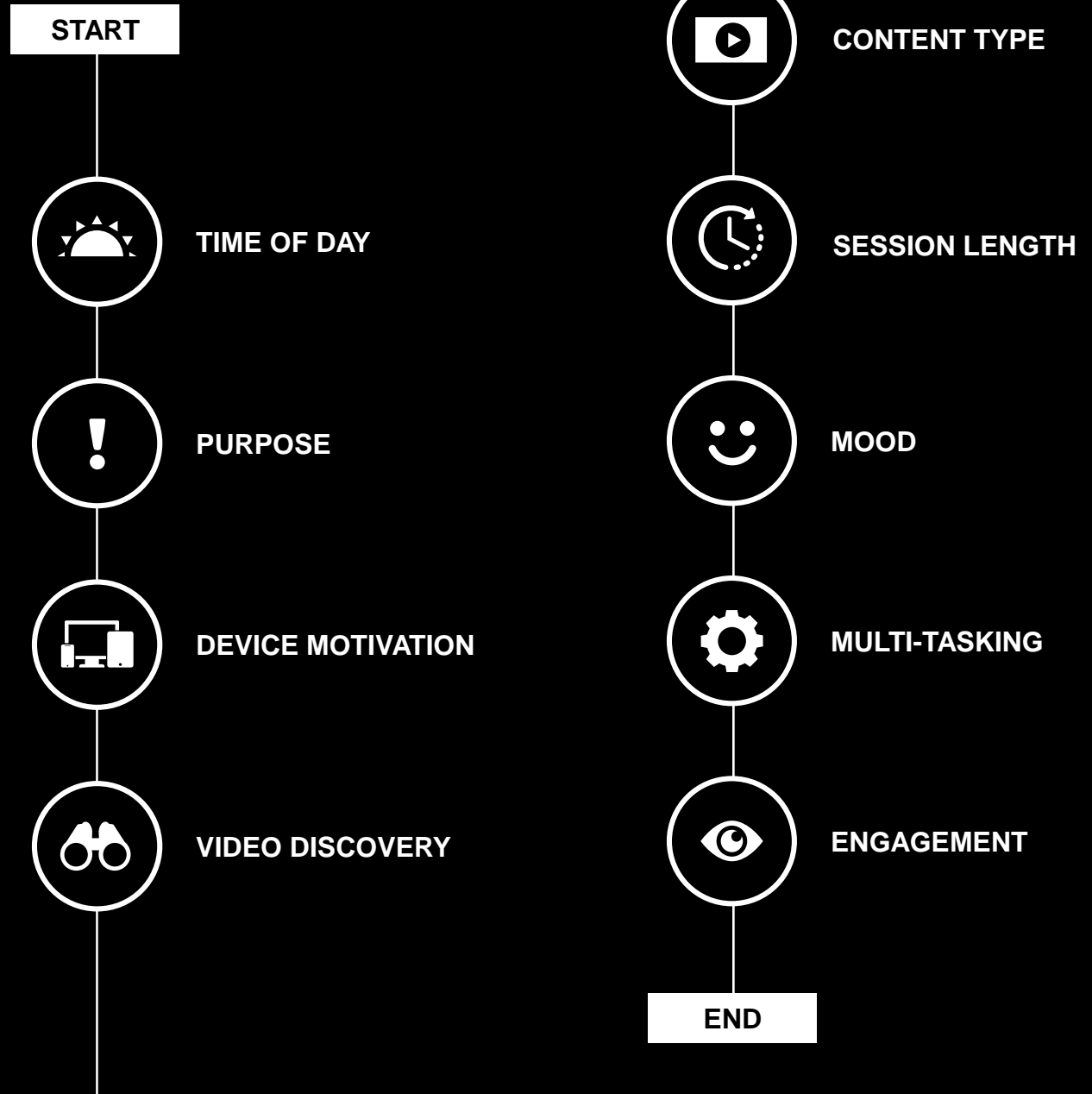


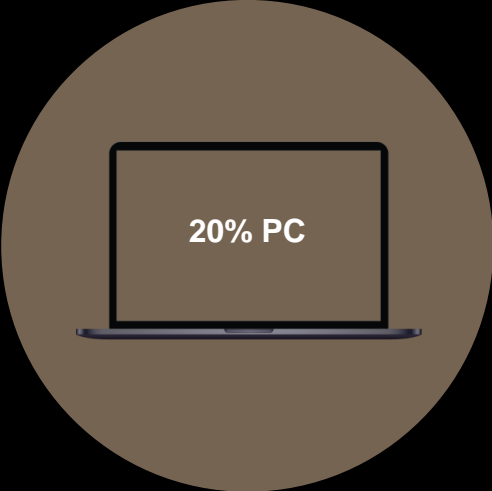
PC

Desktop or laptop

WHAT WAS TRACKED

VIDEO LIFECYCLE FROM INCEPTION TO CONSUMPTION

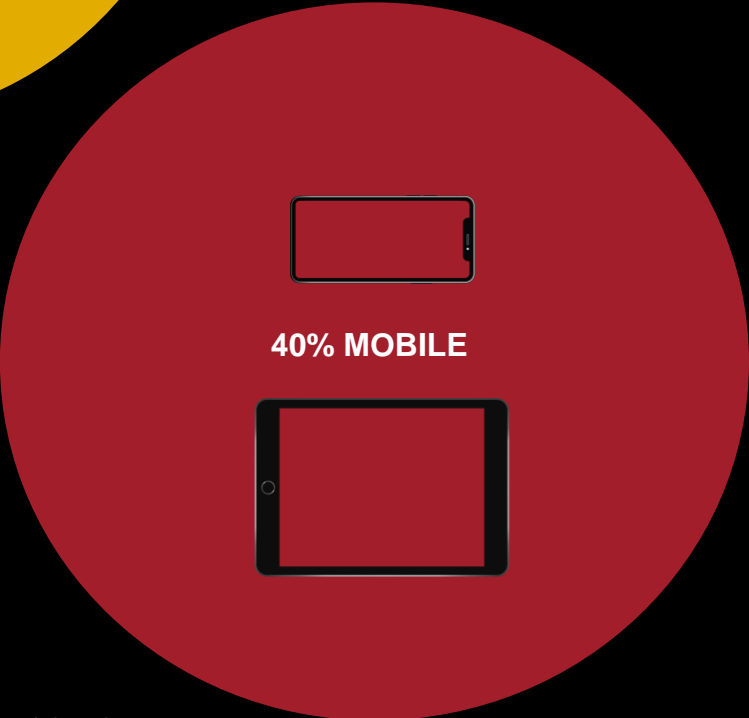
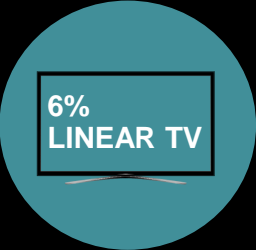




DEVICE MAKEUP OF VIDEO DIARIES

DEVICE COMPOSITION | % OF VIDEO SESSIONS

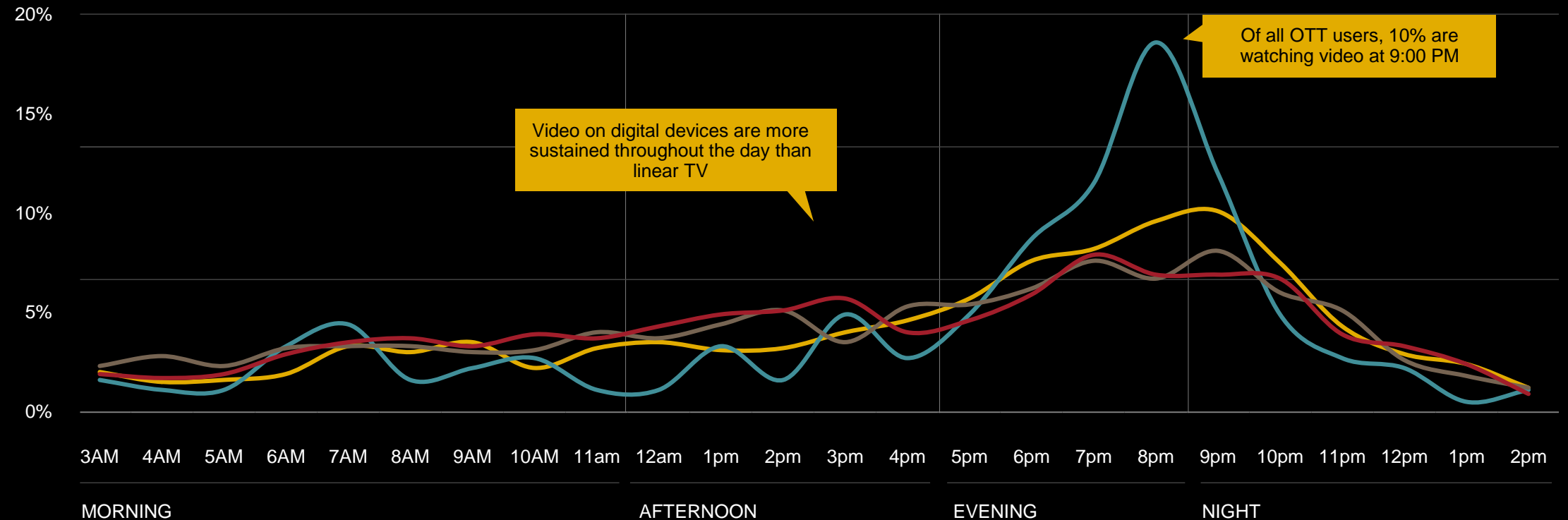
Of all Gen Pop video sessions, 34% were on OTT



ON WEEKDAYS, VIDEO CONSUMPTION NATURALLY PEAKS AFTER-WORK HOURS

WEEKDAY DEVICE USAGE BY HOUR | % INCIDENCE

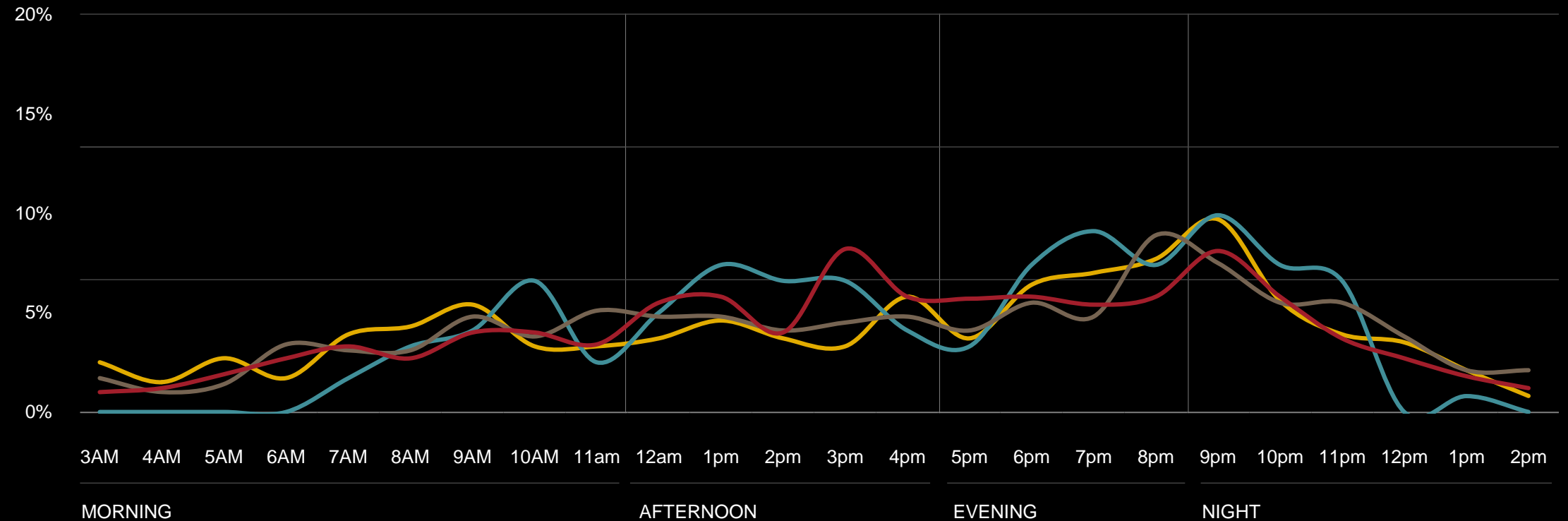
■ OTT ■ Linear TV ■ Mobile ■ PC



ON WEEKENDS, VIDEO ON ALL DEVICES ARE CONSISTENT THROUGHOUT THE DAY

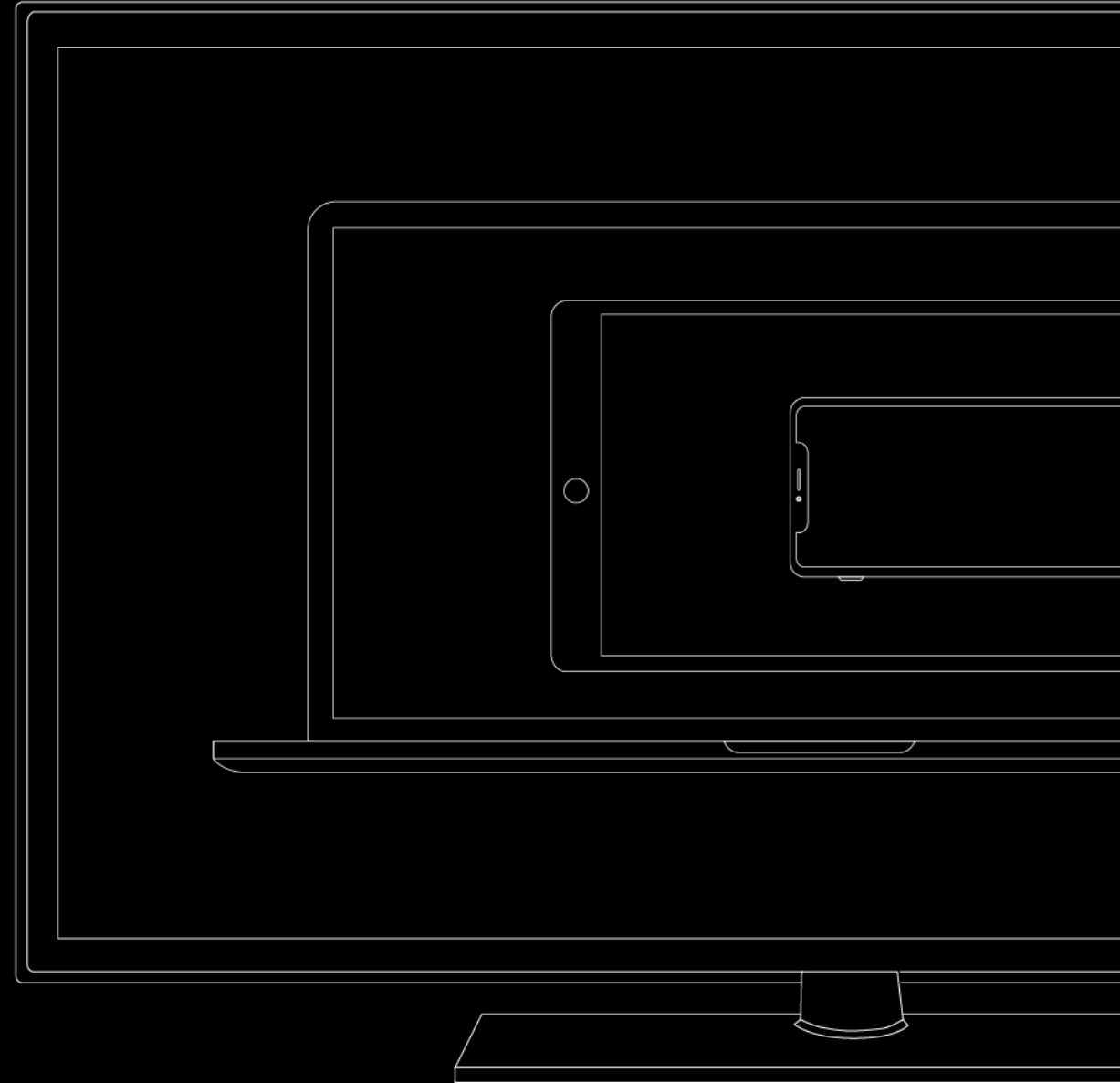
WEEKEND DEVICE USAGE BY HOUR | % INCIDENCE

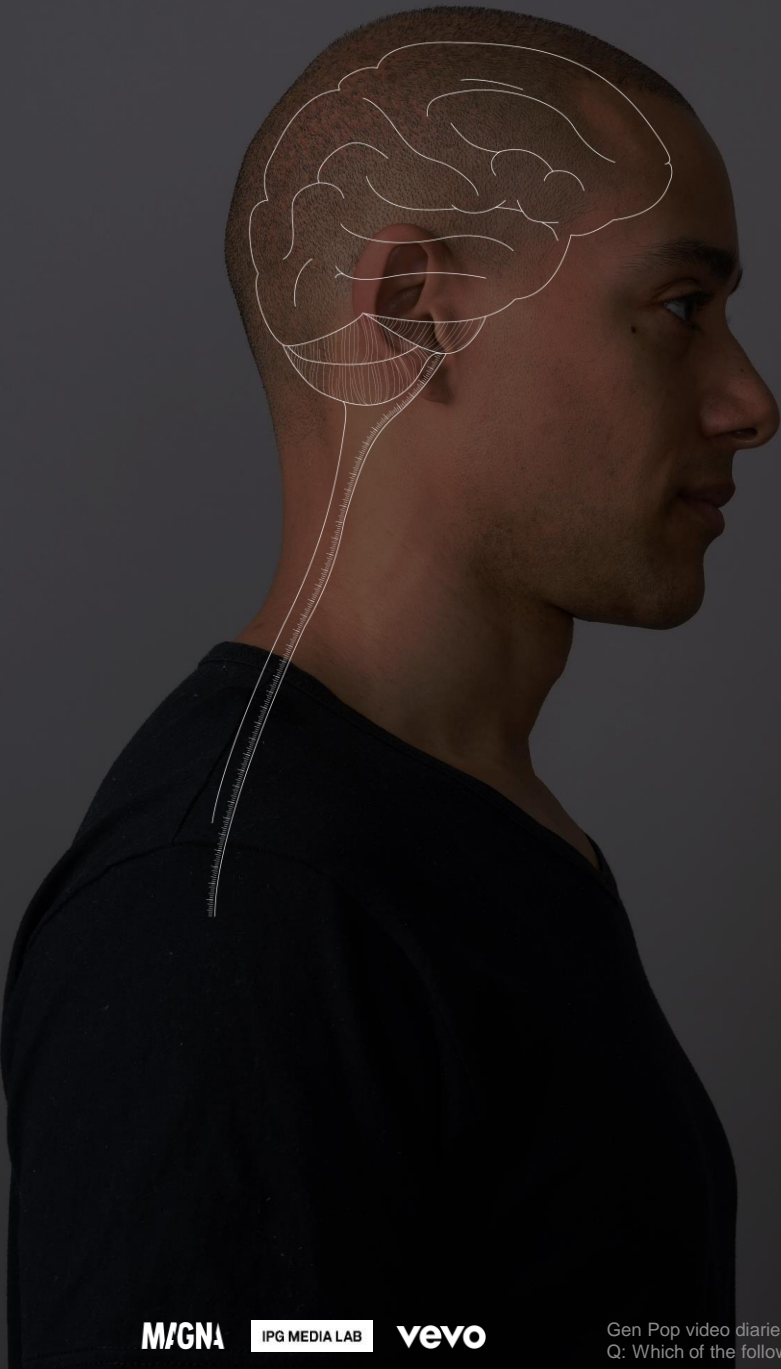
■ OTT ■ Linear TV ■ Mobile ■ PC



THE MOTIVATION BEHIND THE DEVICE

WHICH DEVICE IS CHOSEN + WHY





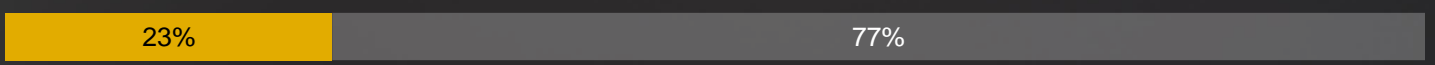
MOST DON'T HAVE A "GO-TO" DEVICE, NOT EVEN MOBILE

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

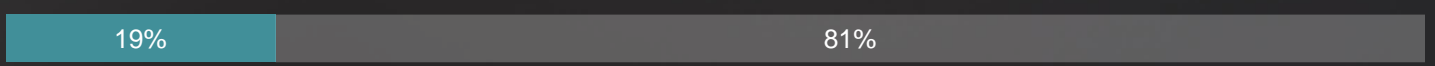
MOTIVATION FOR DEVICE SELECTION BY DEVICE

■ It's my go to device ■ Total other reasons

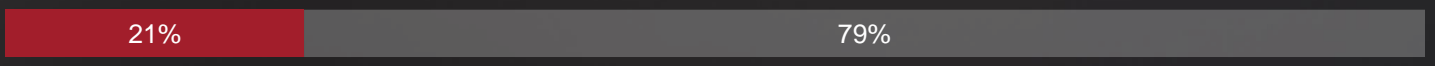
OTT



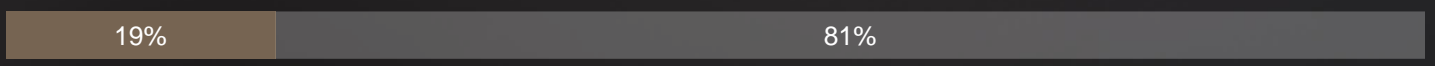
Linear TV

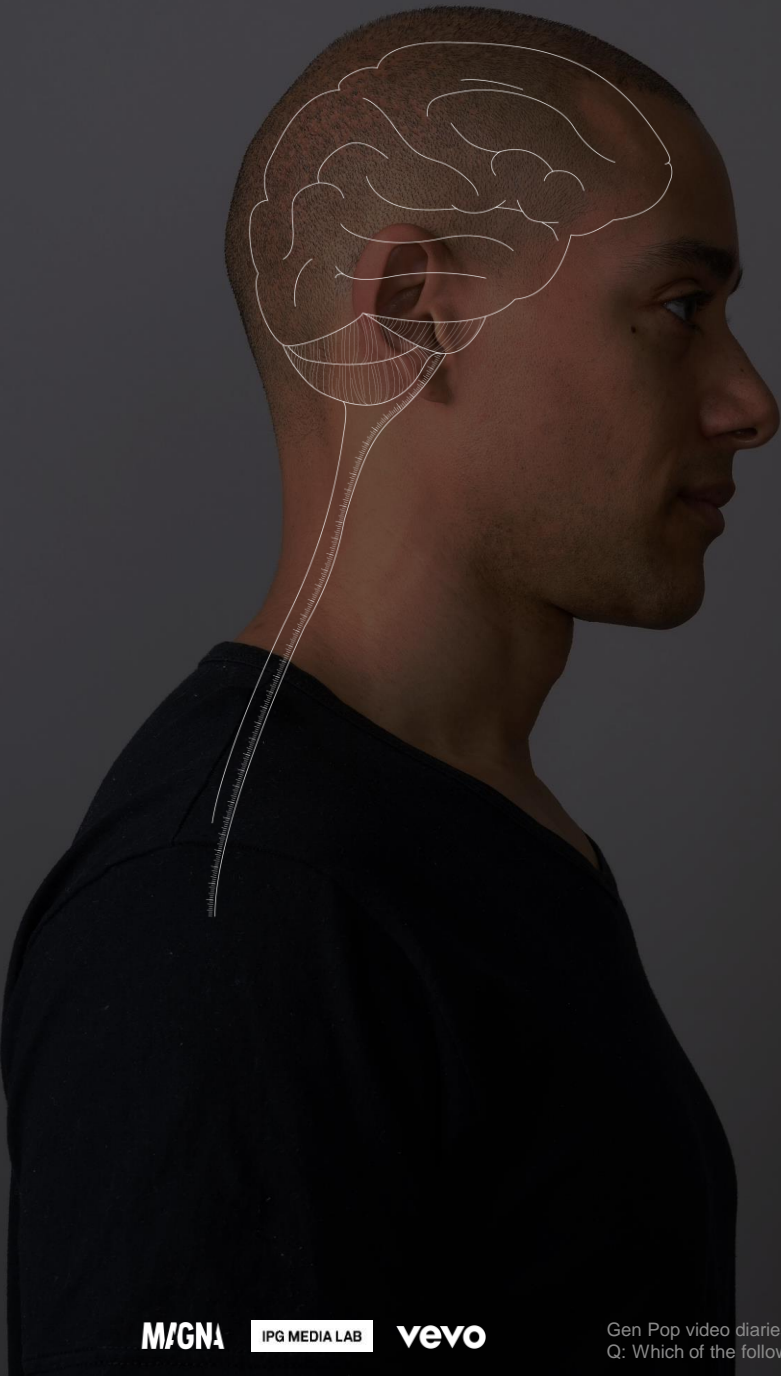


Mobile



PC



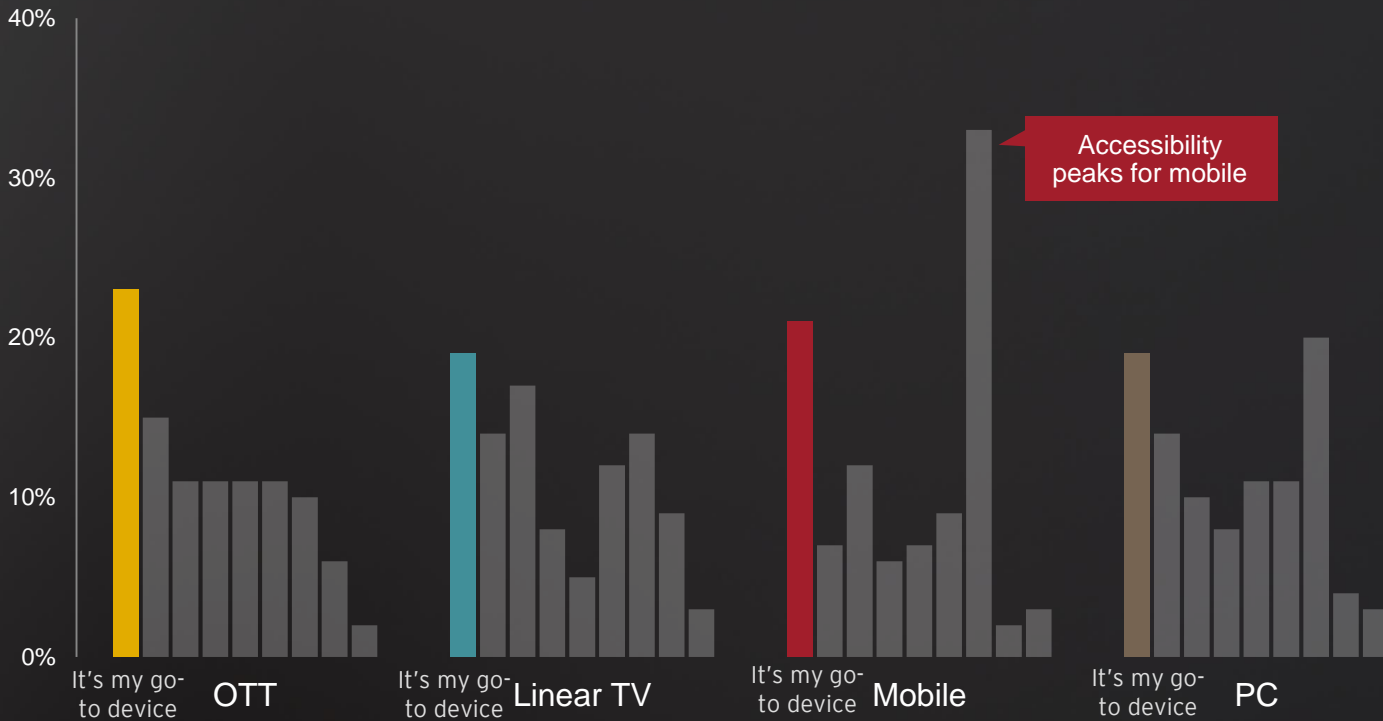


DEVICE SELECTION IS COMPLICATED

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

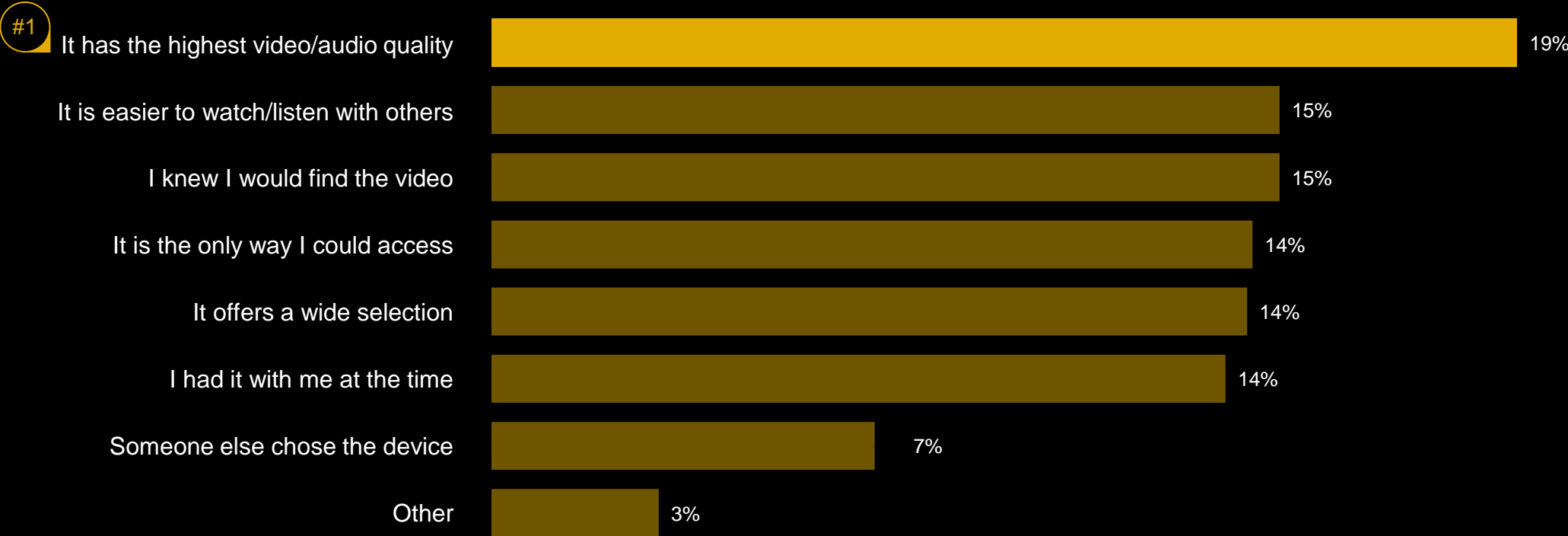
BREAKDOWN | MOTIVATION FOR DEVICE SELECTION BY DEVICE

■ ■ ■ ■ It's my go to device
 ■ Total other reasons



QUALITY IS PRIORITY WHEN CHOOSING OTT

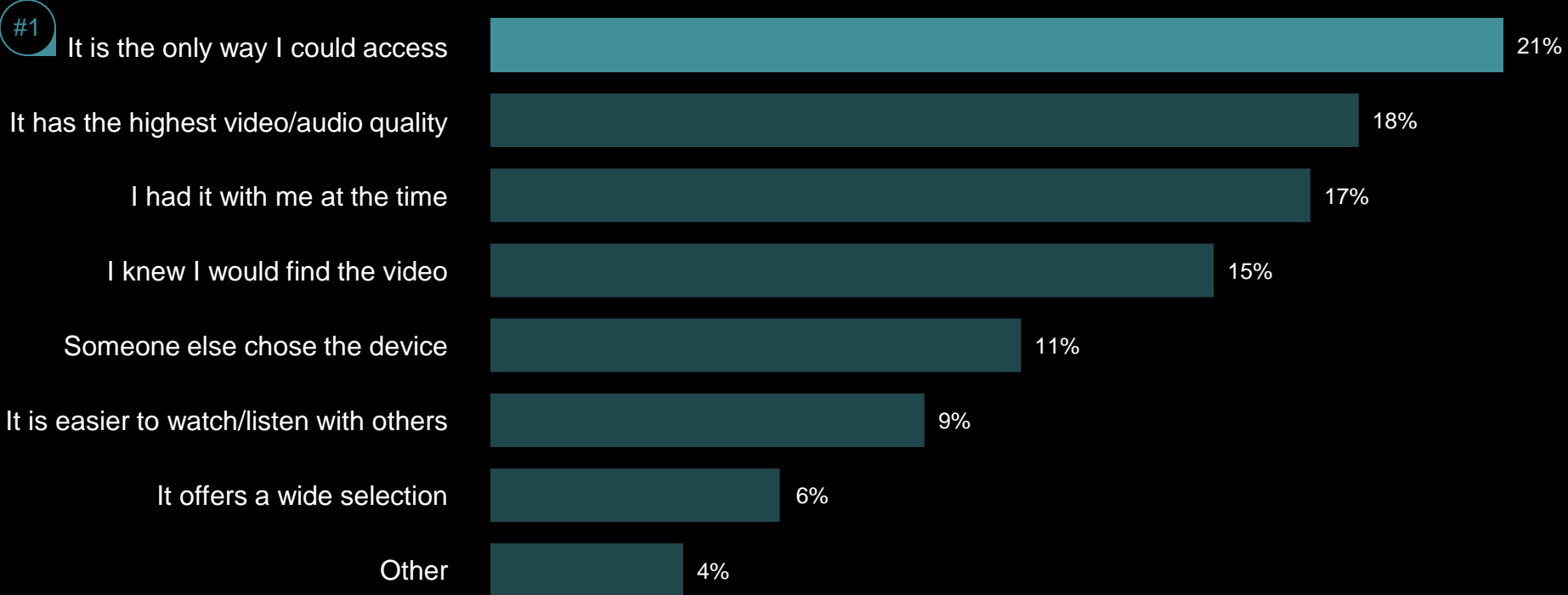
MOTIVATION FOR SELECTING OTT | % OF OTT VIDEO SESSIONS (REBASED*)



*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

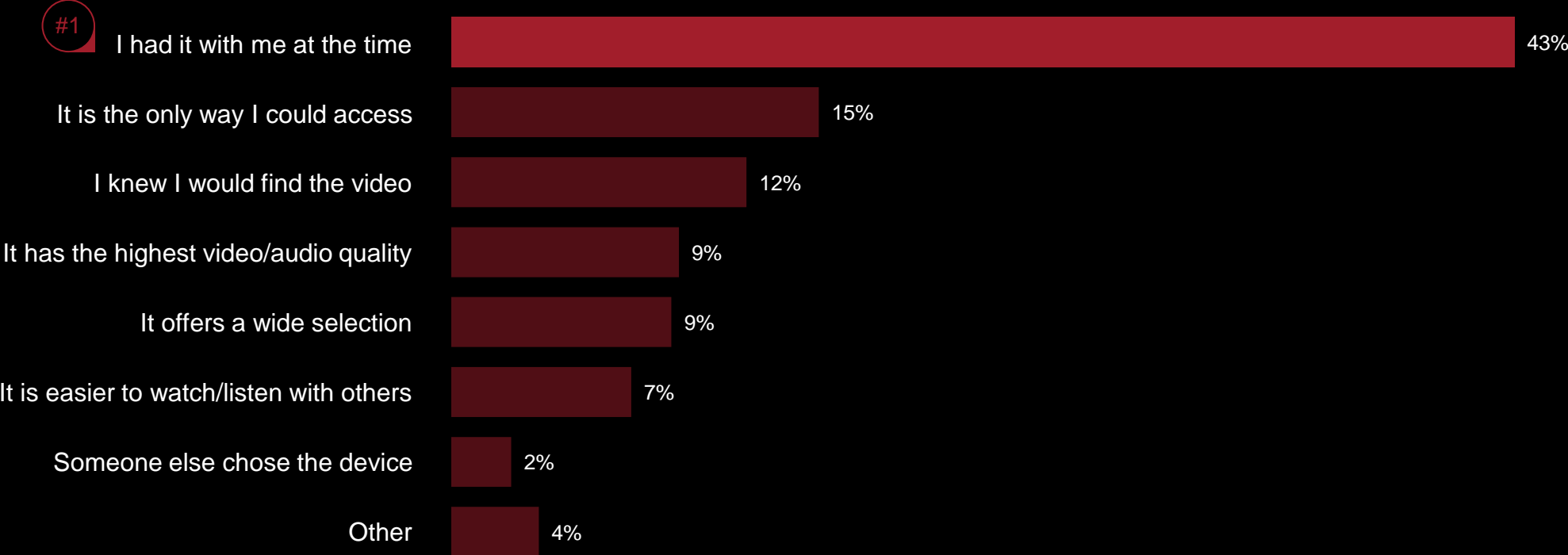
MOTIVATION FOR SELECTING LINEAR TV | % OF LINEAR TV VIDEO SESSIONS (REBASED*)



*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*)

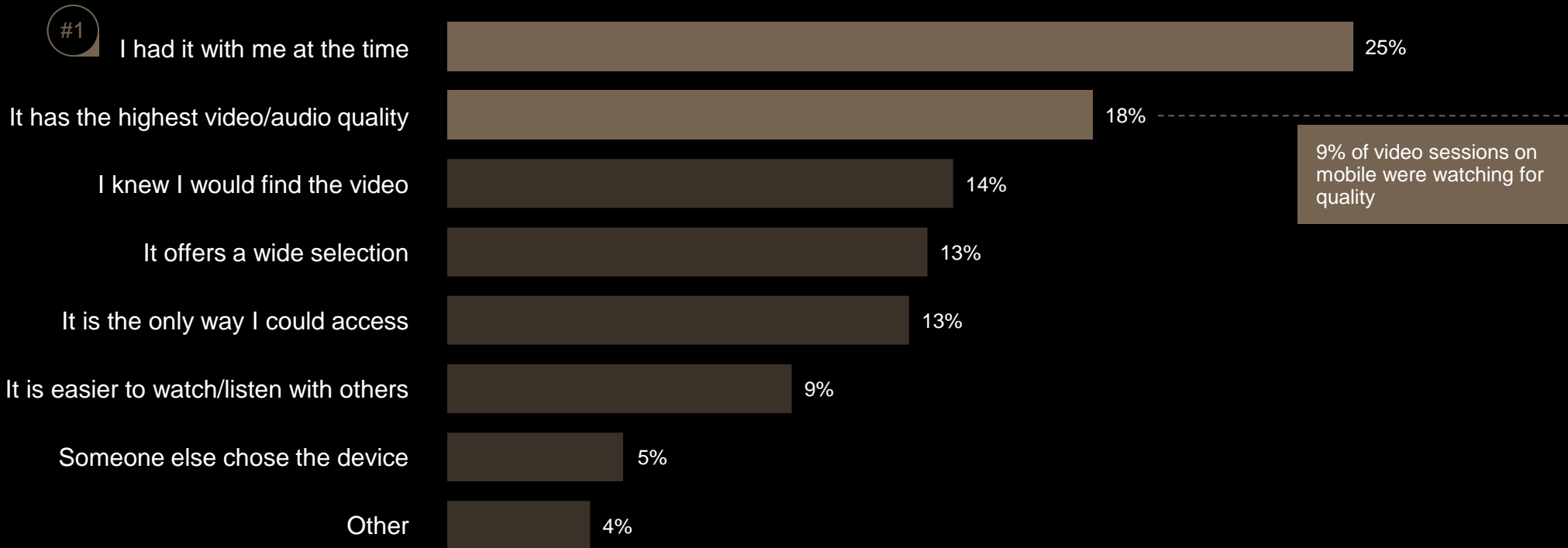


*Rebased without **It's my go-to device"
 Gen Pop video diaries n=5,530 (Mobile n=2,165)
 Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.

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*)

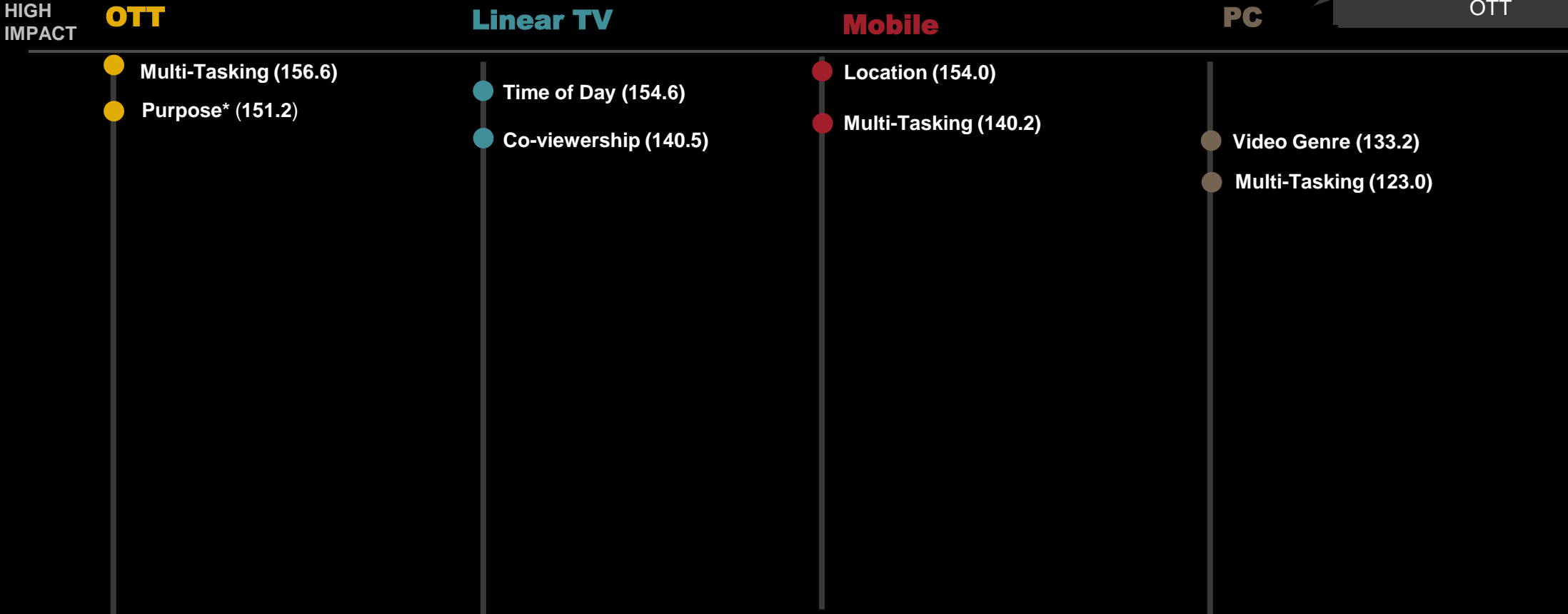


*Rebased without "It's my go-to device"
 Gen Pop video diaries n=5,530 (PC n=1,068)
 Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.

DIFFERENT FACTORS IMPACT MOTIVATIONS FOR CHOOSING EACH DEVICE

Drivers of device selection motivation

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



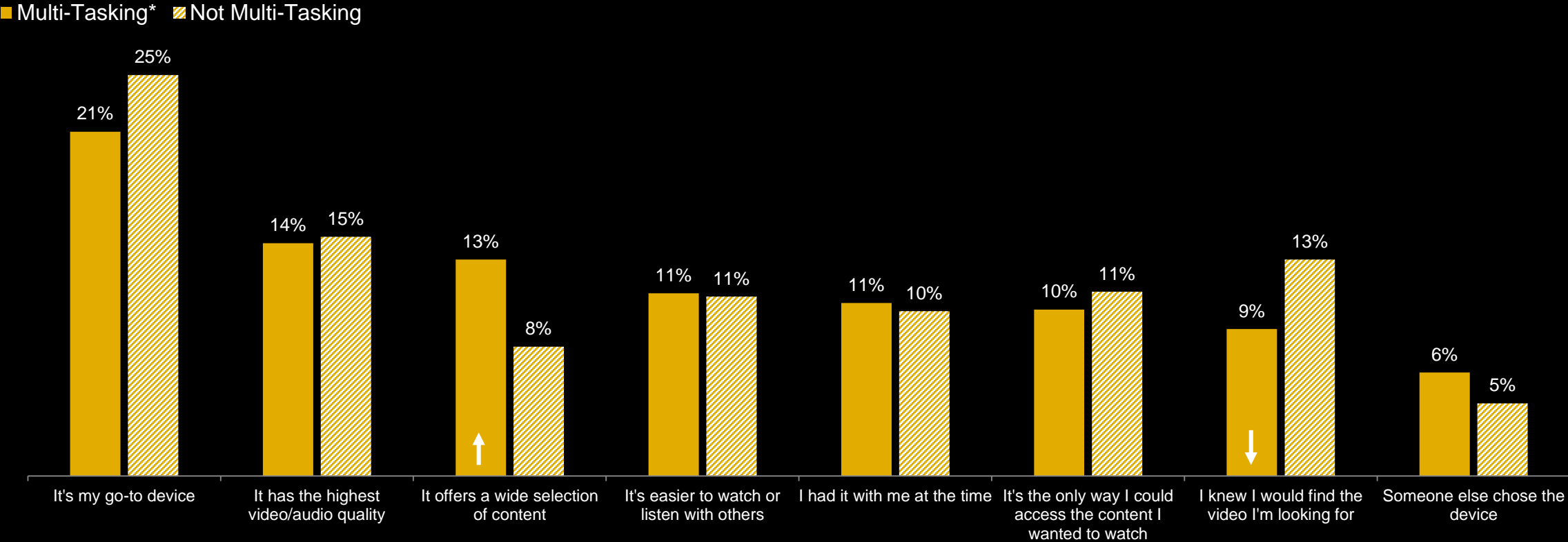
LOW IMPACT

*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



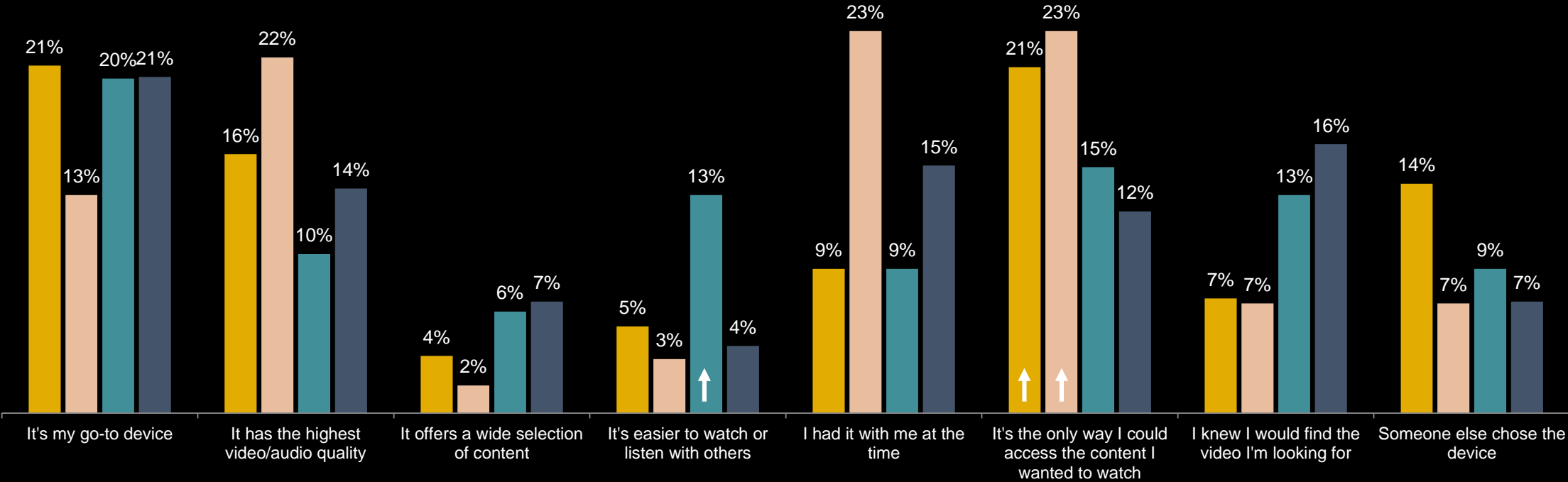
* Multi-tasking activities include: pursuing hobbies, running errands, cooking, shopping, socializing, commuting, working, browsing online on a different device, browsing online on the same device
 Gen Pop video diaries n=5,530 (OTT n=1,792)
 Q: Which of the following best describes your reason(s) for 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.

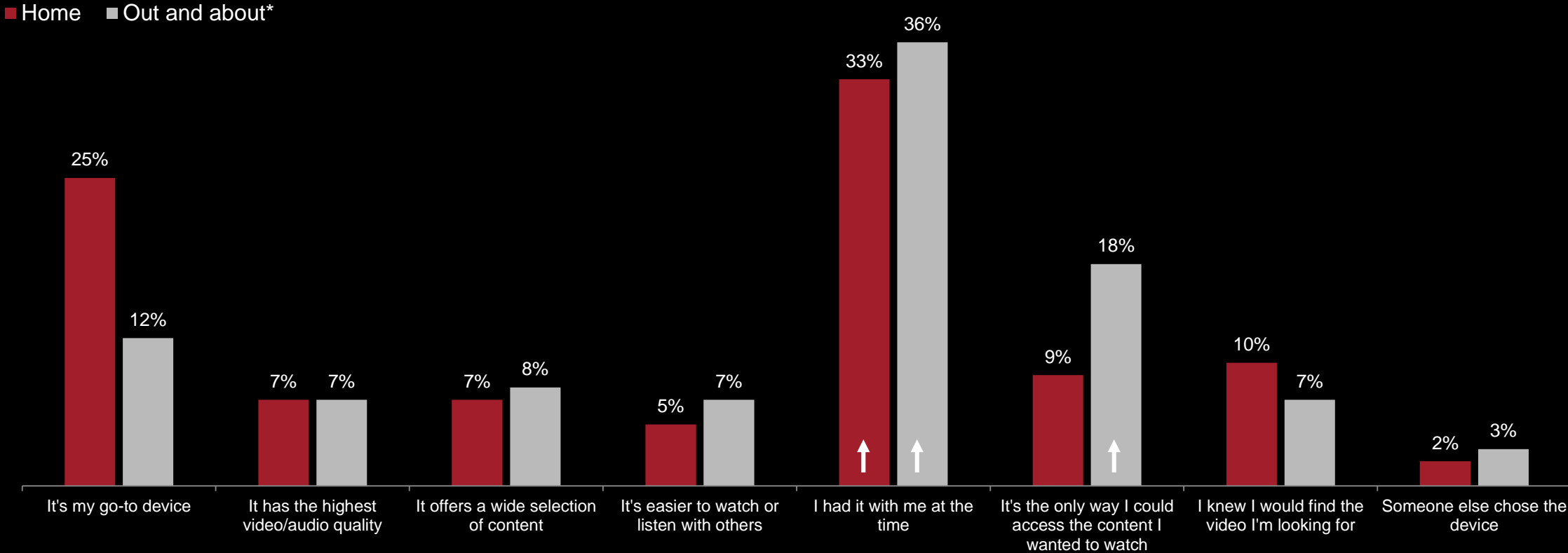
MOTIVATION FOR DEVICE SELECTION BY DAY PART | LINEAR TV | % OF VIDEO SESSIONS

■ Morning ■ Afternoon ■ Evening ■ Night



MOBILE IS CHOSEN OUT OF ACCESSIBILITY BOTH IN AND OUT OF THE HOME

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



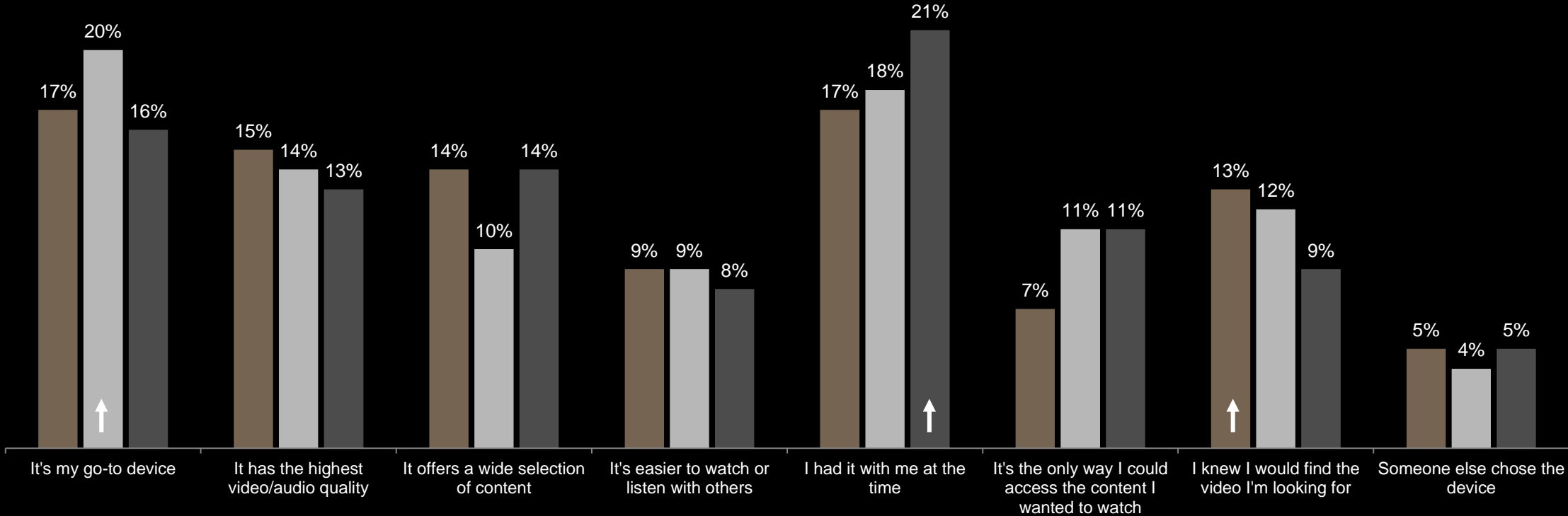
*Out-and-about locations include: restaurant or bar, store, school, gym, work, commuting, vacation
 Gen Pop video diaries n=5,530 (Mobile n=2,165)
 Q: Which of the following best describes your reason(s) for choosing a [device] when you played video during your video session that began yesterday at [time]? Select one.

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

■ Music ■ Entertaining* ■ Informative**



*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.



LEARN SOMETHING NEW

SPEND TIME WITH OTHERS
TO KILL TIME

CHEER UP

KEEP UP WITH EVENTS

GET OTHER TASKS DONE

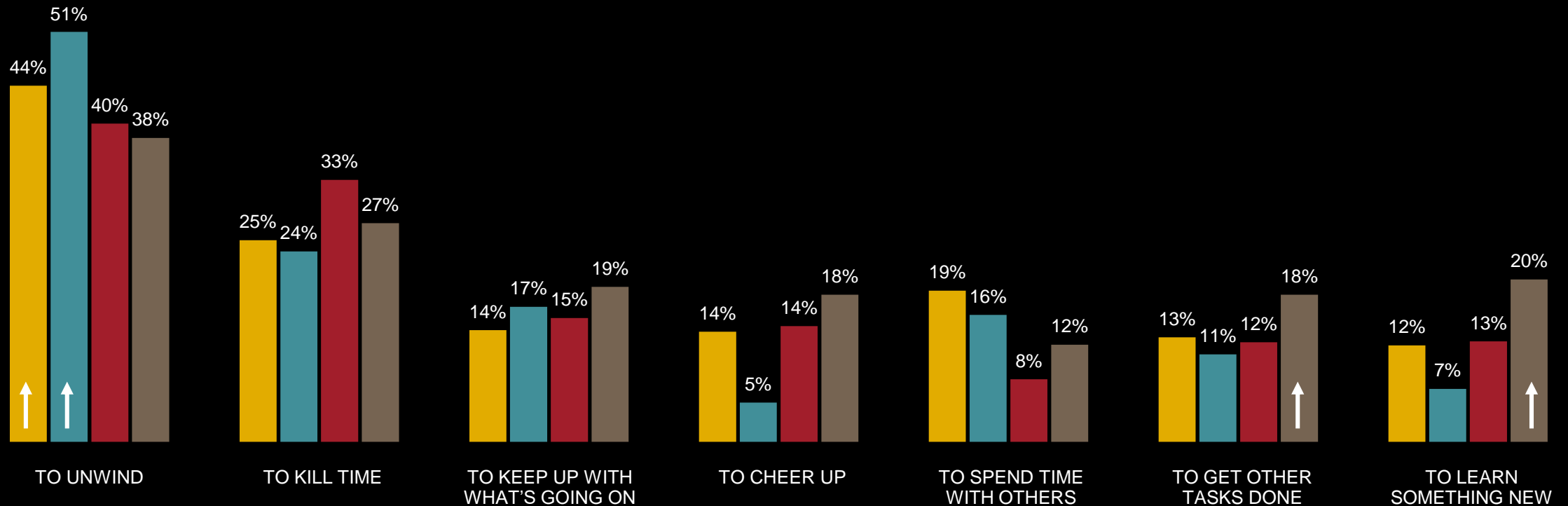
VIDEO FROM INCEPTION TO CONSUMPTION

RELAXATION ON BIGGER SCREENS, TASKS ON PC

Leverage need state targeting by aligning creative with consumer mindset.

PURPOSE | % OF VIDEO SESSIONS

■ OTT ■ Linear TV ■ Mobile ■ PC



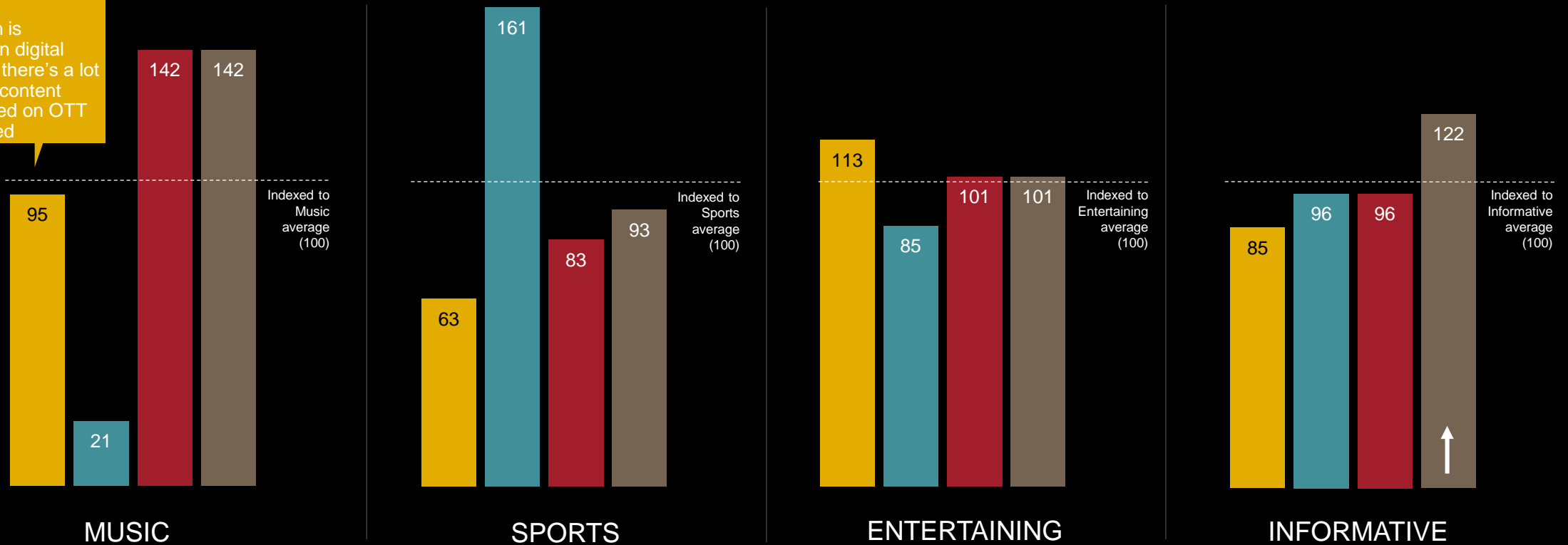
NATURALLY, CONTENT GENRE ALIGNS WITH PURPOSE

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



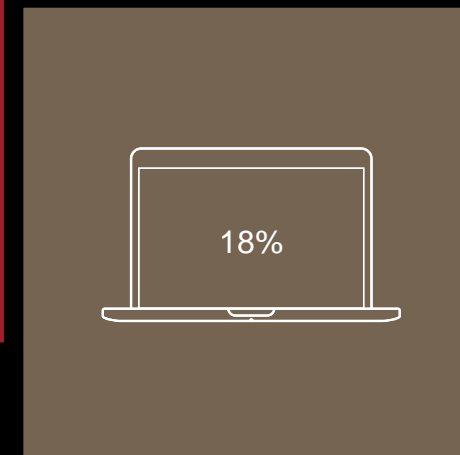
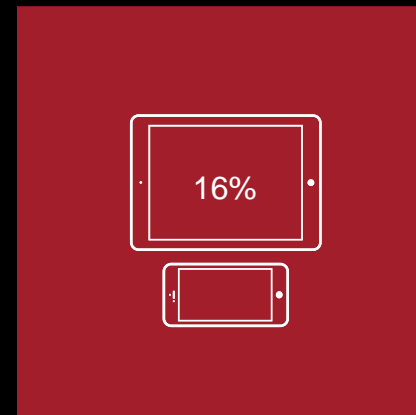
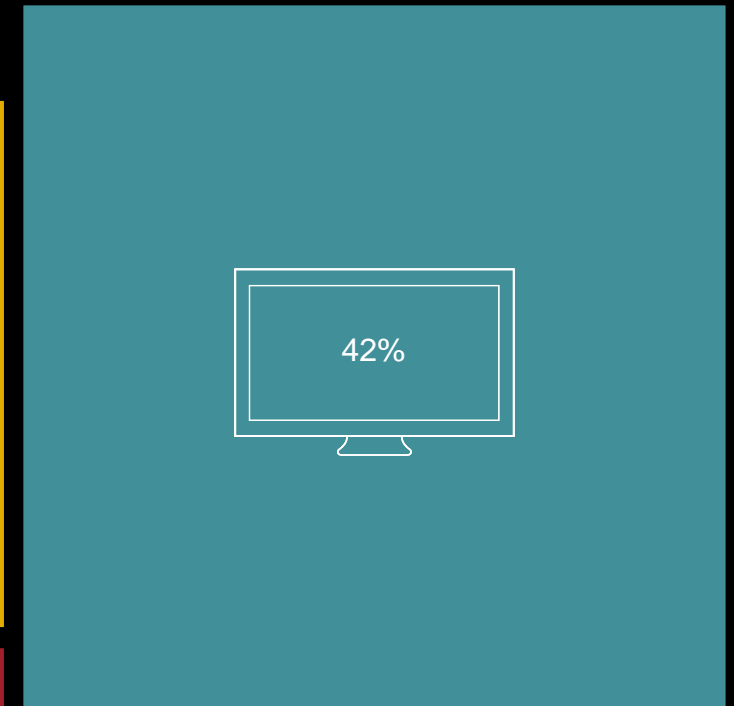
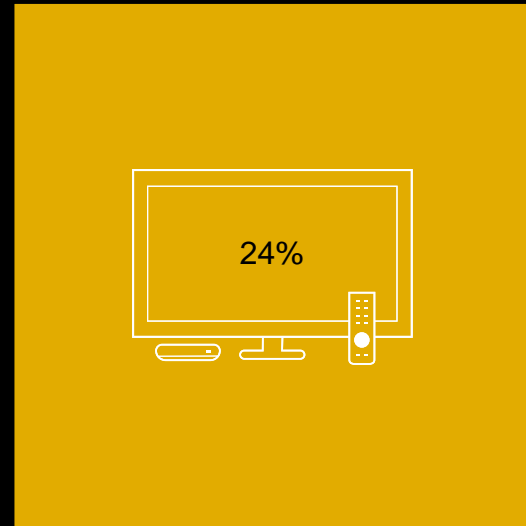
DESPITE OTT BEING HAILED AS LEAN- FORWARD, MORE PASSIVE SEARCH THAN OTHER DIGITAL DEVICES

Content Providers: Ensure good content discovery options on OTT.

Brands: Consider OTT sponsorships that assist with content discovery.

PASSIVE VIDEO DISCOVERY | % OF VIDEO SESSIONS

- OTT
- Linear TV
- Mobile
- PC

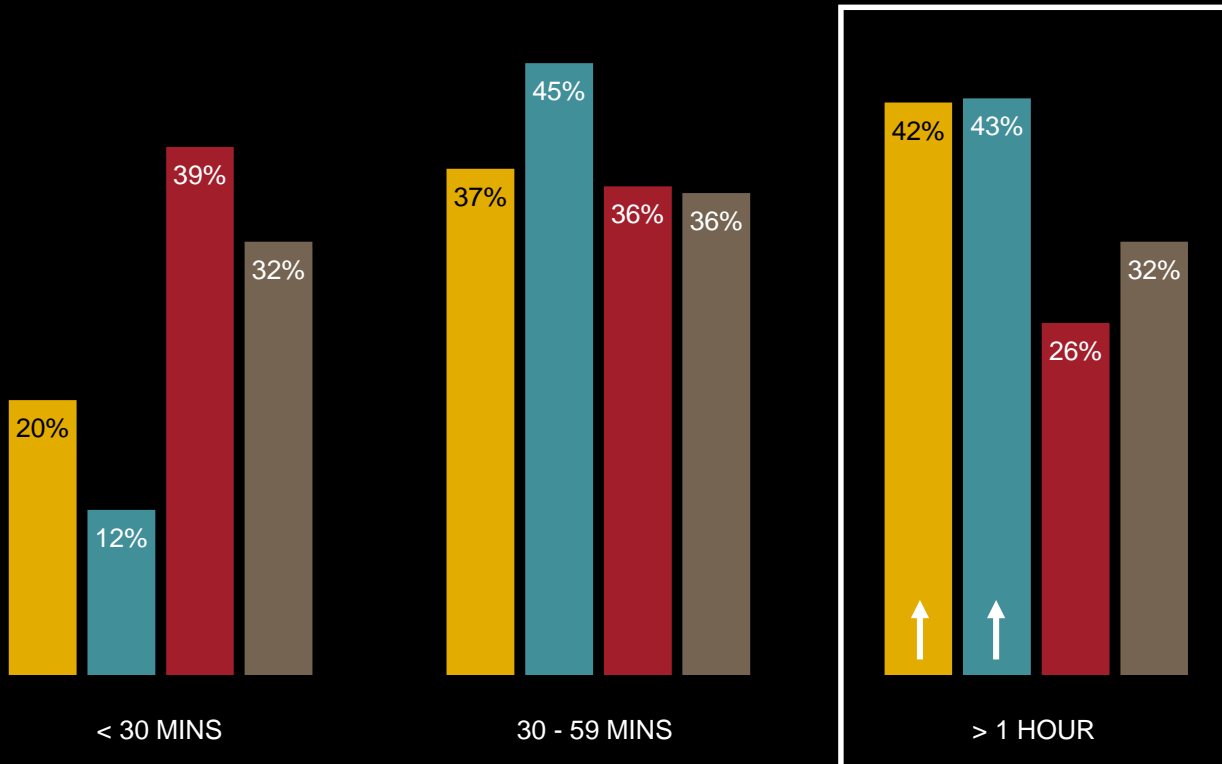


SIGNIFICANT BINGEING ON OTT AND LTV

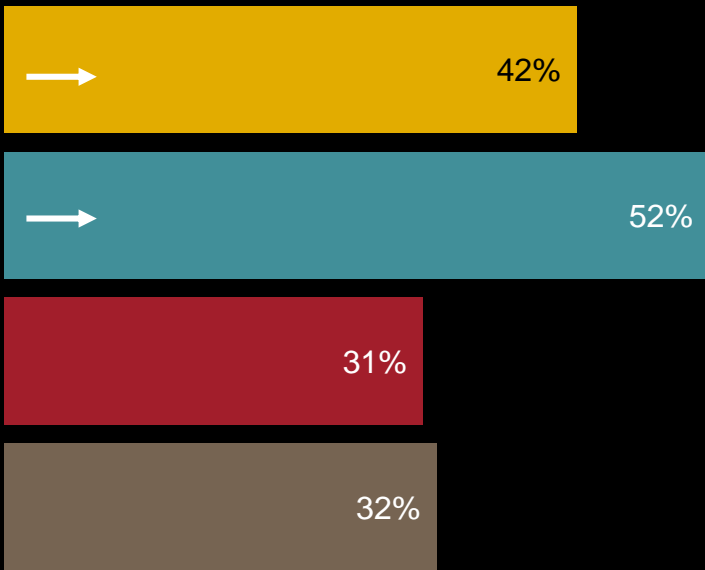
Explore frequency windowing & ad sequencing.

SESSION LENGTH & BINGE VIEWING | % OF VIDEO SESSIONS

■ OTT ■ Linear TV ■ Mobile ■ PC



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

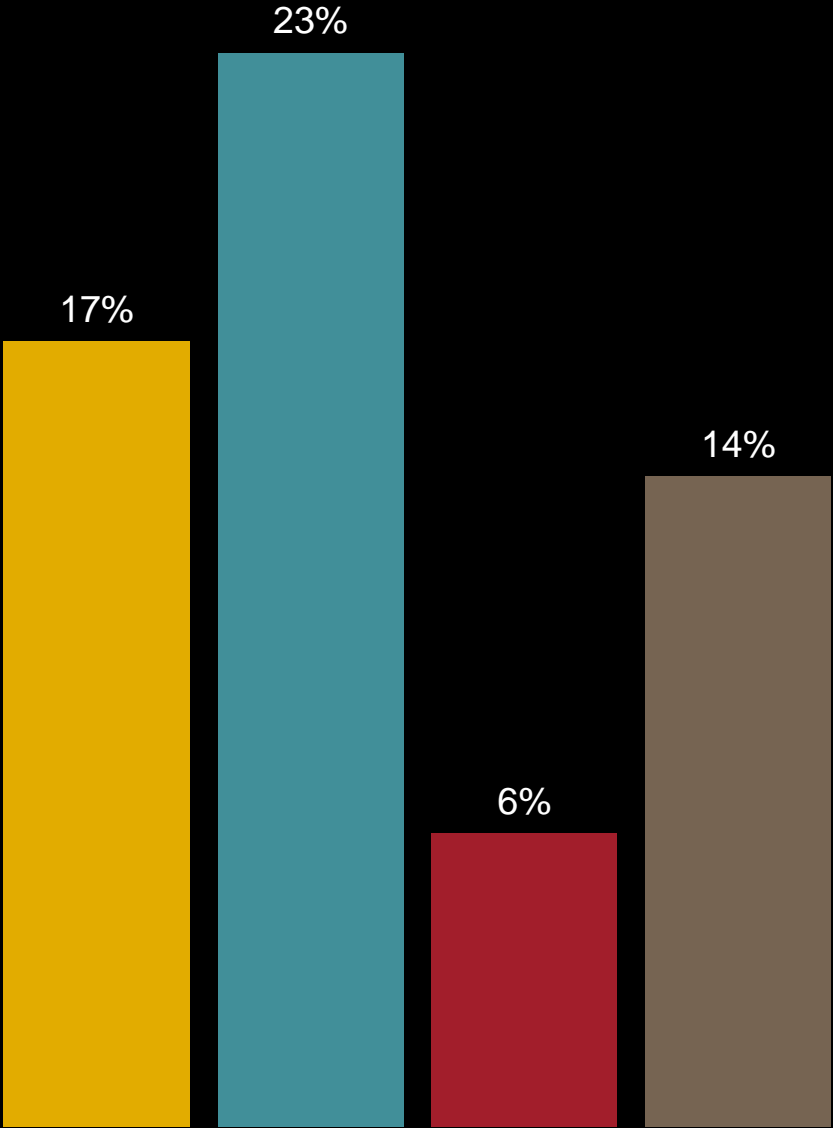


LINEAR TV USERS MULTI-TASK BY BROWSING ON DIGITAL

Explore planning simultaneous cross-screen exposure.

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

- OTT
- Linear TV
- Mobile
- PC



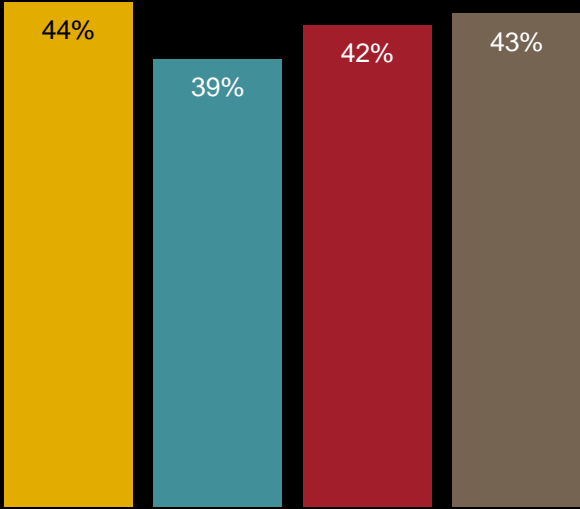
REGARDLESS OF DEVICE, EARS ARE PLAYING MORE ATTENTION THEN EYES

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

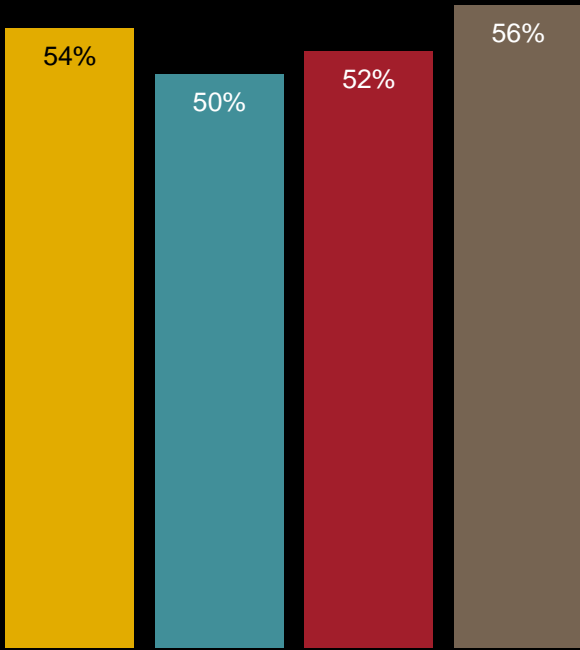
ATTENTION TO CONTENT | % OF VIDEO SESSIONS

■ OTT ■ Linear TV ■ Mobile ■ PC ▨

+  Attention to audio is similarly high for music
x



FULL ATTENTION TO VISUAL



FULL ATTENTION TO AUDIO

TAKEAWAYS ON VIDEO

1

People have relaxation in mind when watching on bigger screens, and utility when on PC.

2

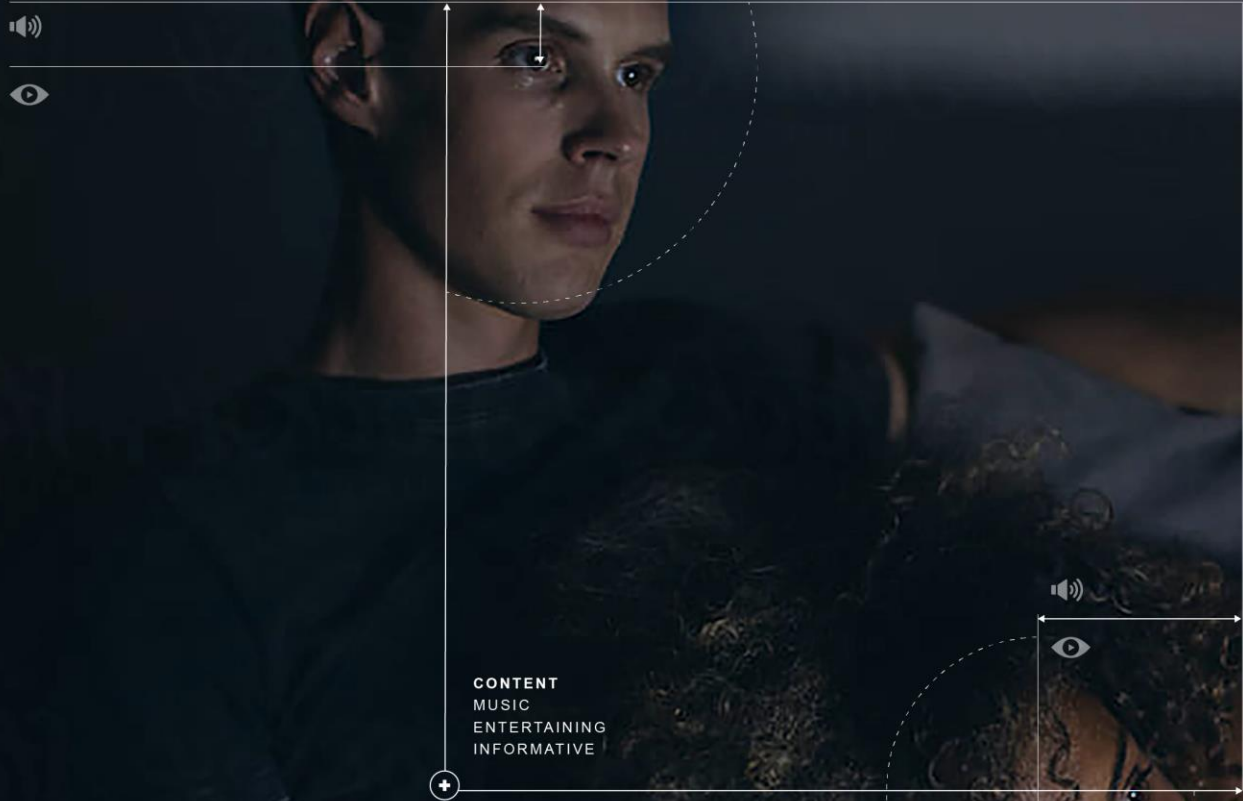
Surprisingly, there's more passive search discovery happening on OTT than digital devices.

3

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

4

Regardless of device, people are paying more attention to audio, than visual.



CONTENT
MUSIC
ENTERTAINING
INFORMATIVE

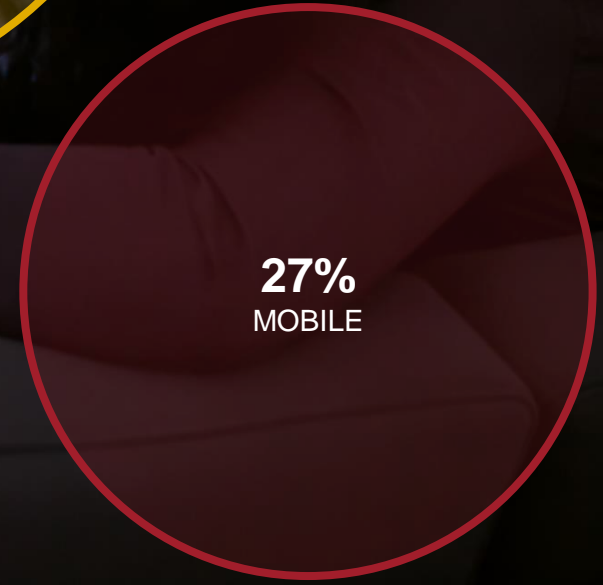
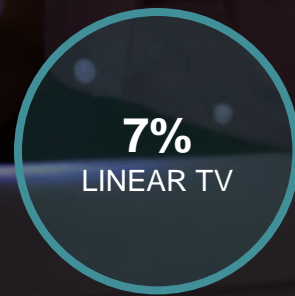
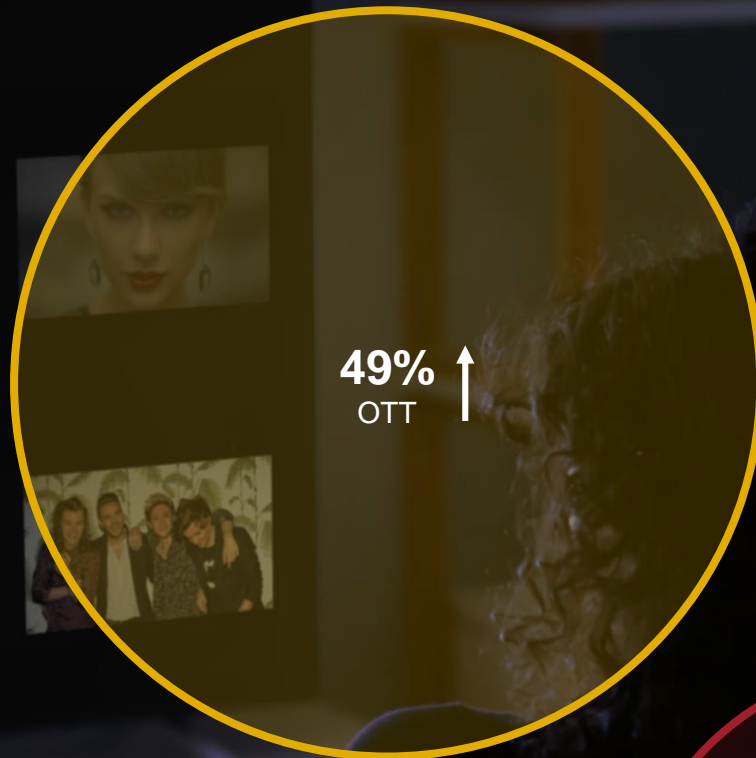
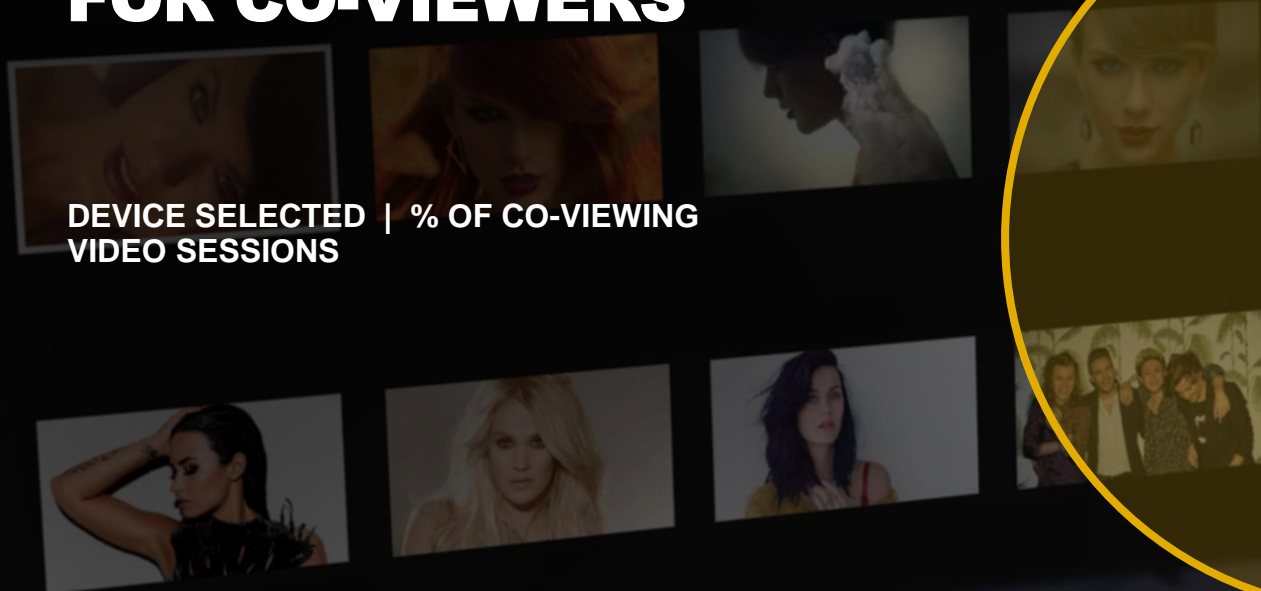


SPOTLIGHT ON CO-VIEWERSHIP

WITH AN EMPHASIS ON OTT

OTT IS WHERE IT'S AT FOR CO-VIEWERS

DEVICE SELECTED | % OF CO-VIEWING
VIDEO SESSIONS

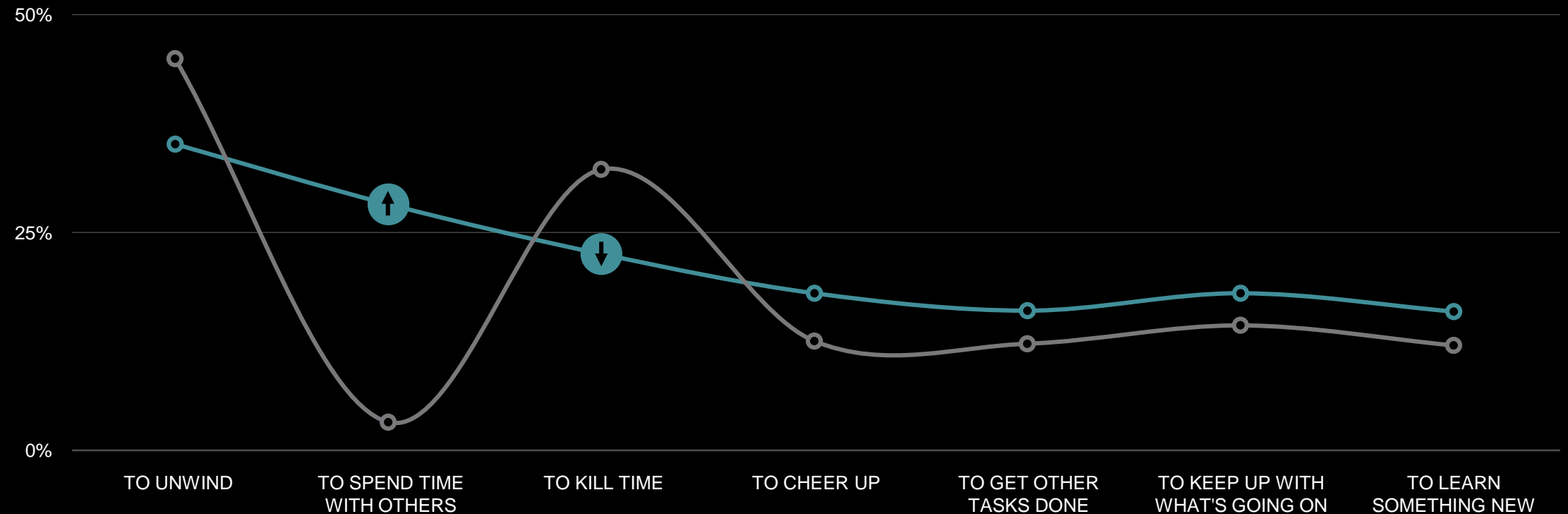


CO-VIEWING IS INTENTIONAL QUALITY TIME RATHER THAN TIME TO PASS

PURPOSE BY CO-VIEWERSHIP | % OF VIDEO SESSIONS

— Co-Viewers

— Solo Viewers

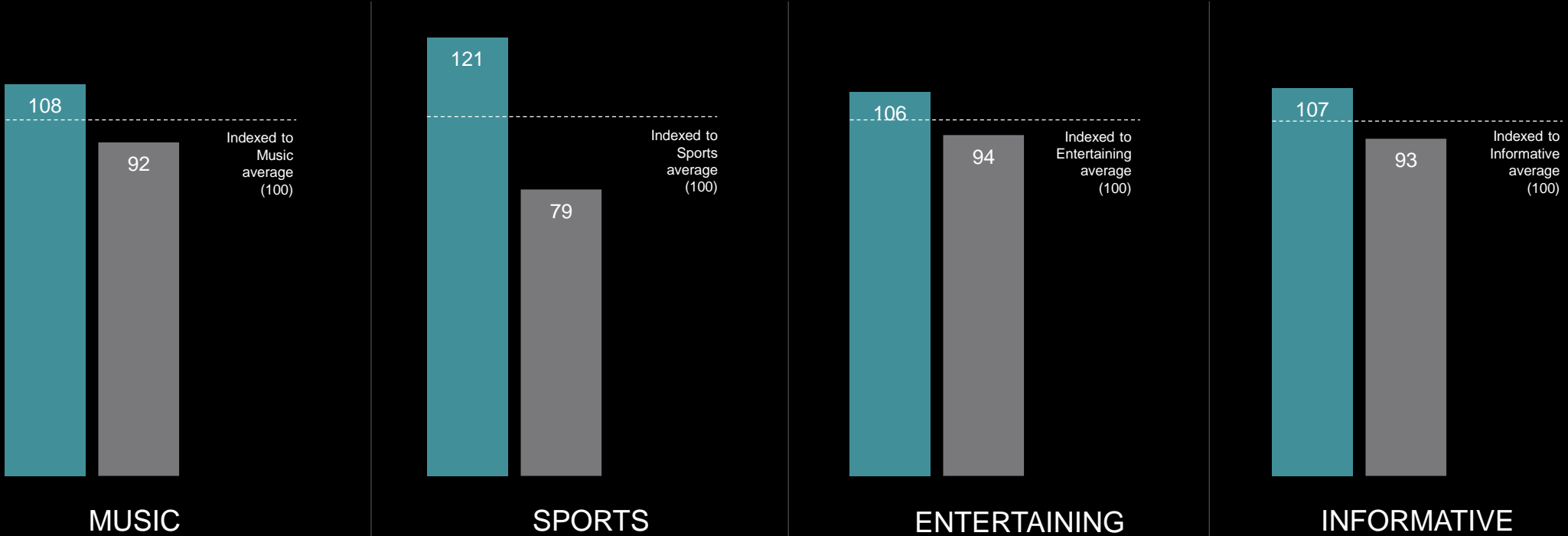


CO-VIEWERS ARE WATCHING A WIDE VARIETY OF CONTENT

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

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

■ Co-Viewers ■ Solo Viewers



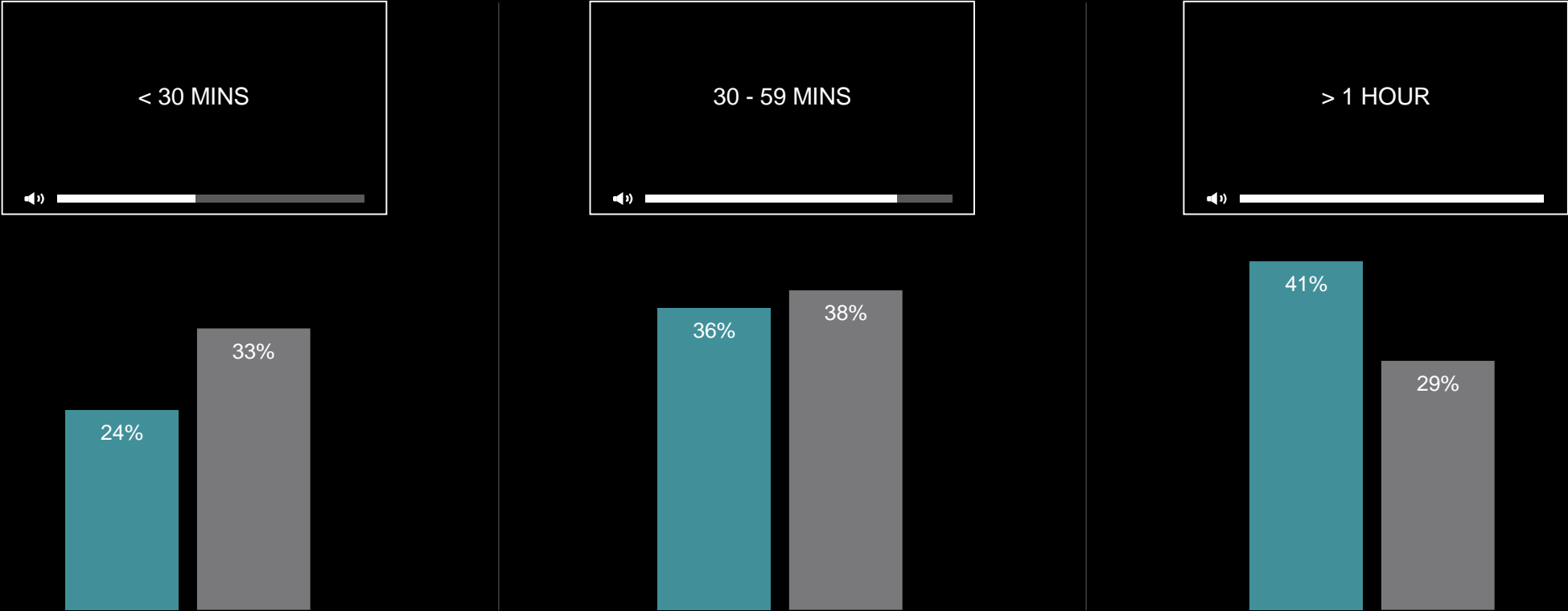
*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
 **Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
 Co-viewing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

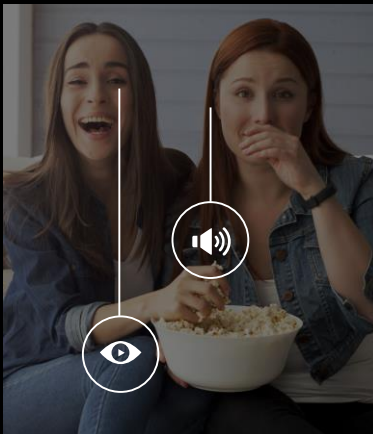


CO-VIEWING MEANS OPENNESS TO ADS

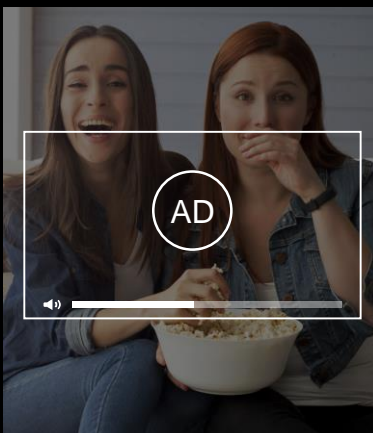
While co-viewers pay equal attention to the content as solo viewers, ad receptivity is higher.

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

- Co-Viewers
- Solo Viewers



ATTENTION TO AUDIO + VISUAL (TB)



AD RECEPTIVITY (TB)



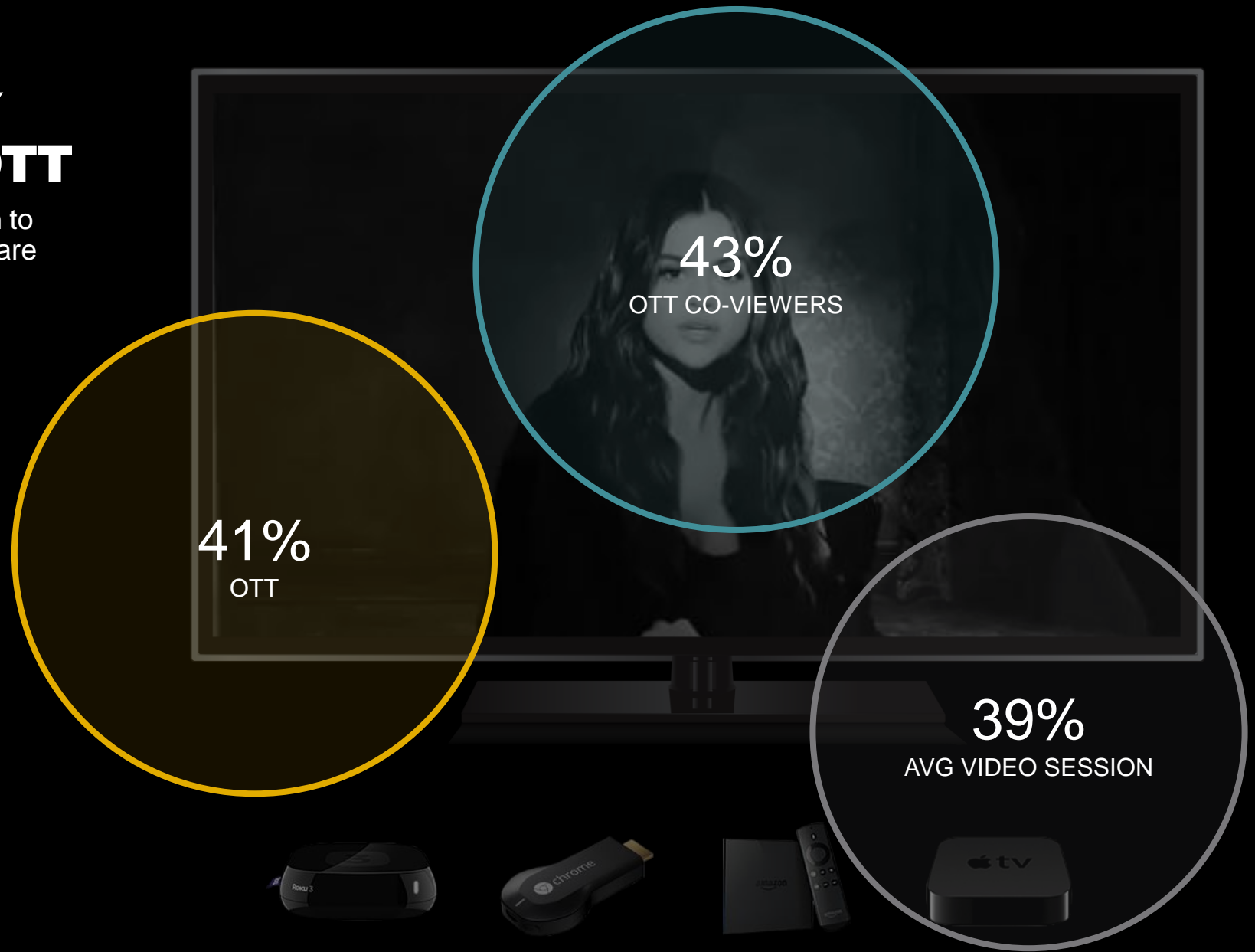
Co-viewers on OTT are more likely to be excited and happy and less likely to be bored and tired than solo viewers on OTT

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



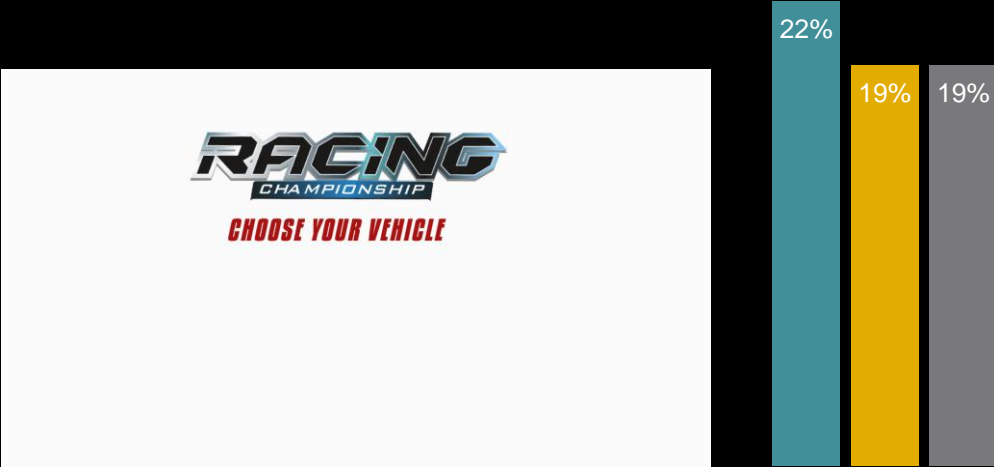
OTT CO-VIEWERS MORE OPEN TO NEW AD TYPES

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

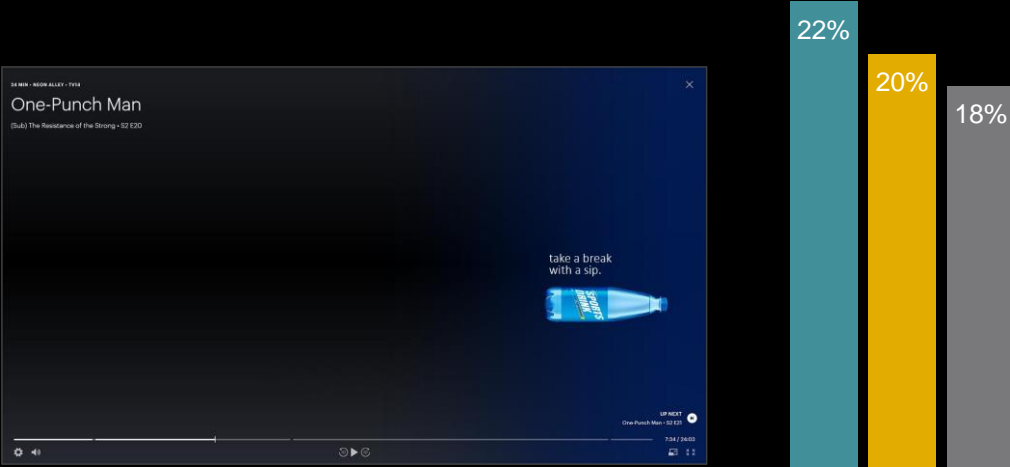
AD RECEPTIVITY (TB) | OTT CO-VIEWING | % OF VIDEO SESSIONS

■ OTT Co-Viewers ■ OTT ■ Average Video Session

INTERACTIVE ADS



STATIC ADS (APPEARS ON SCREEN WHEN VIDEO IS PAUSED)



TAKEAWAYS ON CO-VIEWING

1

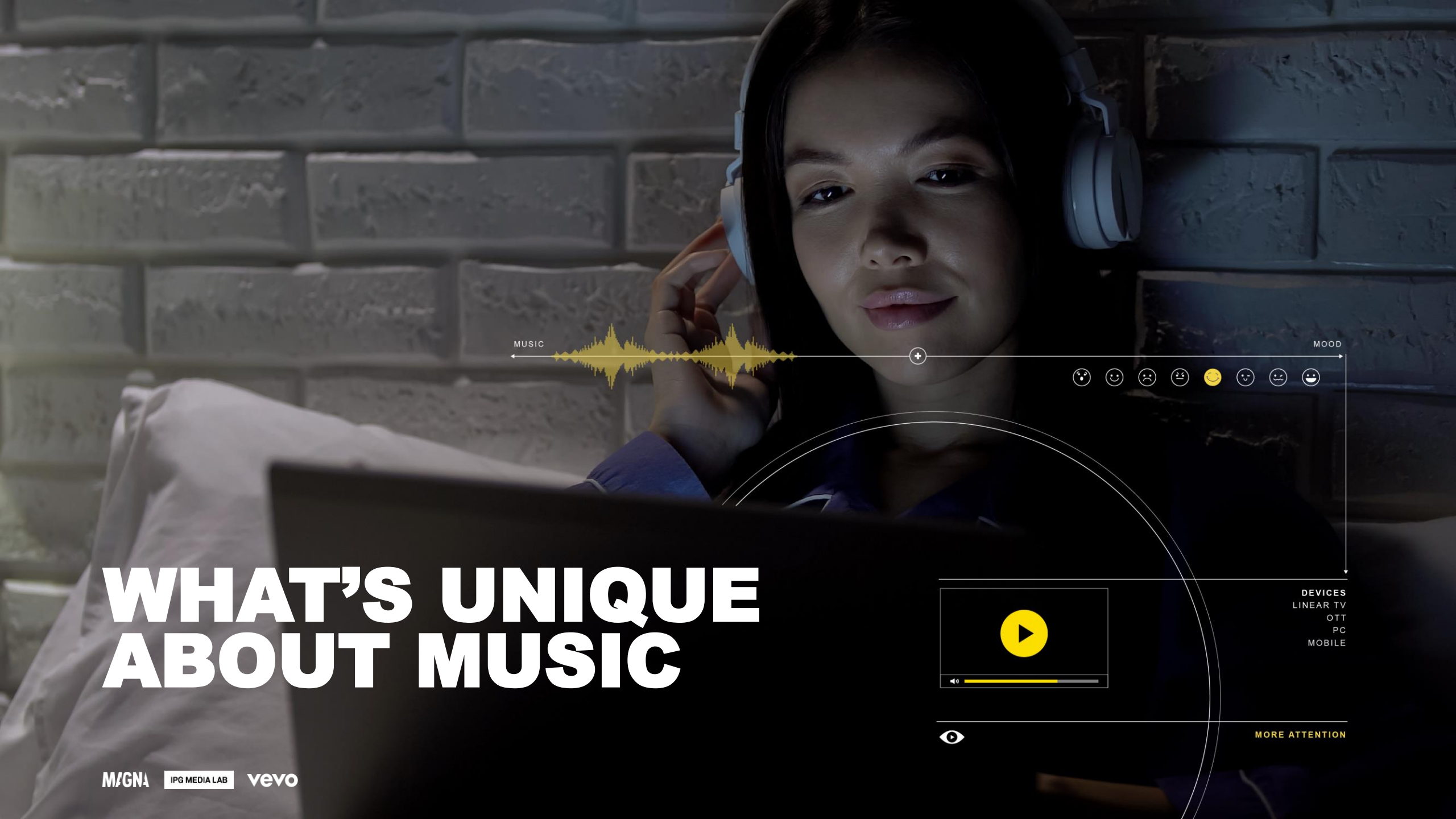
Co-viewing is an intentional viewing experience, given purpose and longer watch times.

2

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.

3

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



MOOD



DEVICES
LINEAR TV
OTT
PC
MOBILE



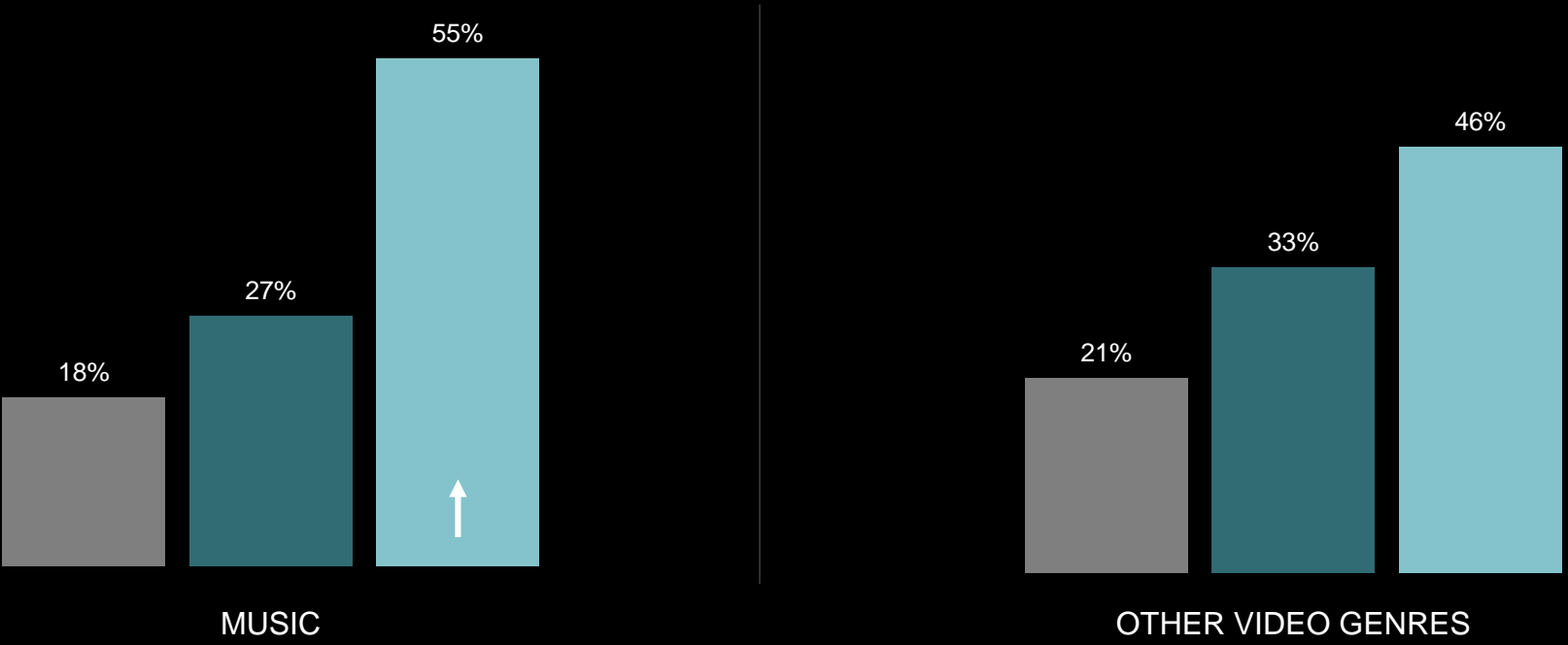
MORE ATTENTION

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)

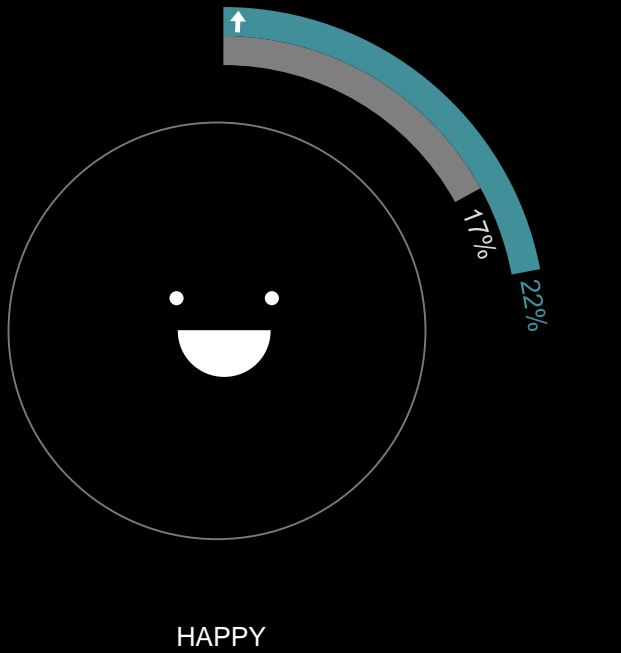
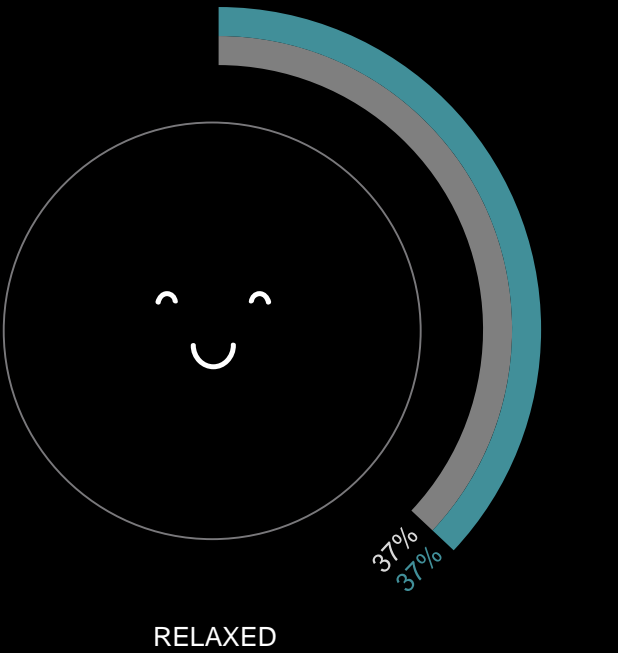


MORE HAPPY, LESS TIRED WITH MUSIC VIDEOS

Advertisers can reach consumers in positive moods through music content.

MOOD BY GENRE | % OF VIDEO SESSIONS

■ Music ■ Other Video Genres*



*Other video genres include: Action, Business, Cooking or Home Design, Comedy, Drama, Family, Gaming, Game/Talk Shows, How-To/DIY, 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.

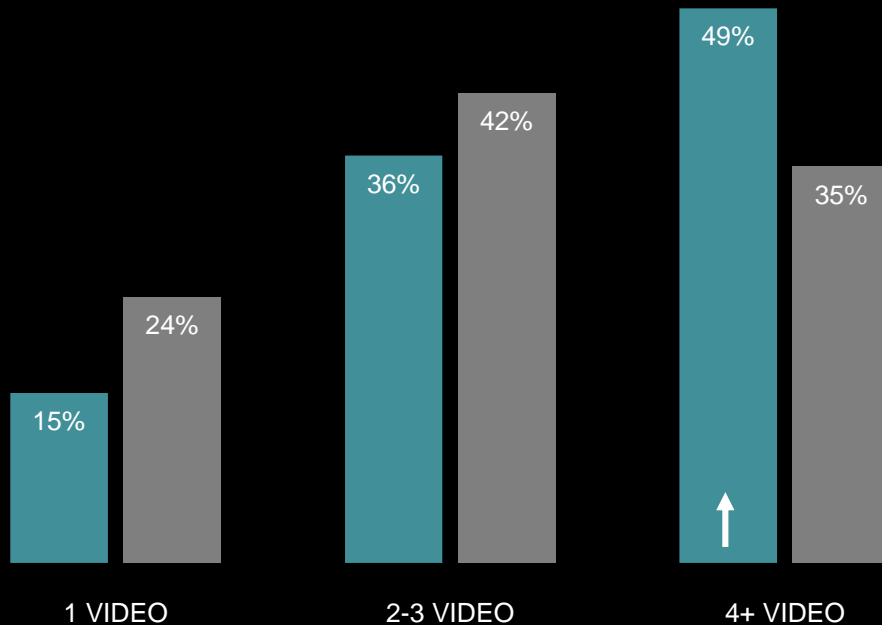
YOUTUBE = THE MUSIC VIDEO BINGER'S PLATFORM

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

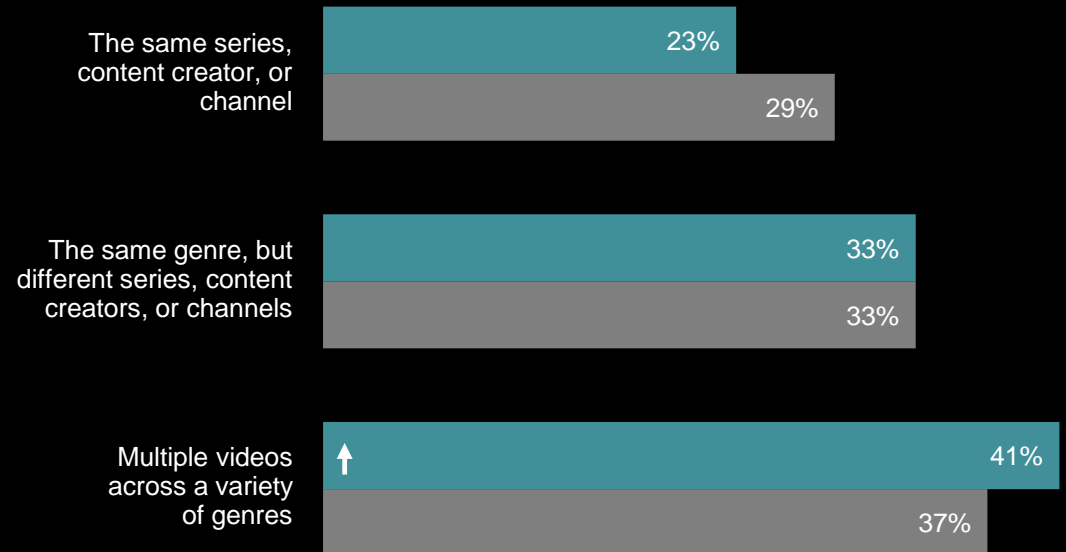
BINGE WATCHING ON YOUTUBE (FREE) BY GENRE | % OF VIDEO SESSIONS

■ Music ■ Other Video Genres

AMOUNT OF VIDEOS I PLAYED...



I BINGE ON MULTIPLE VIDEOS FROM...

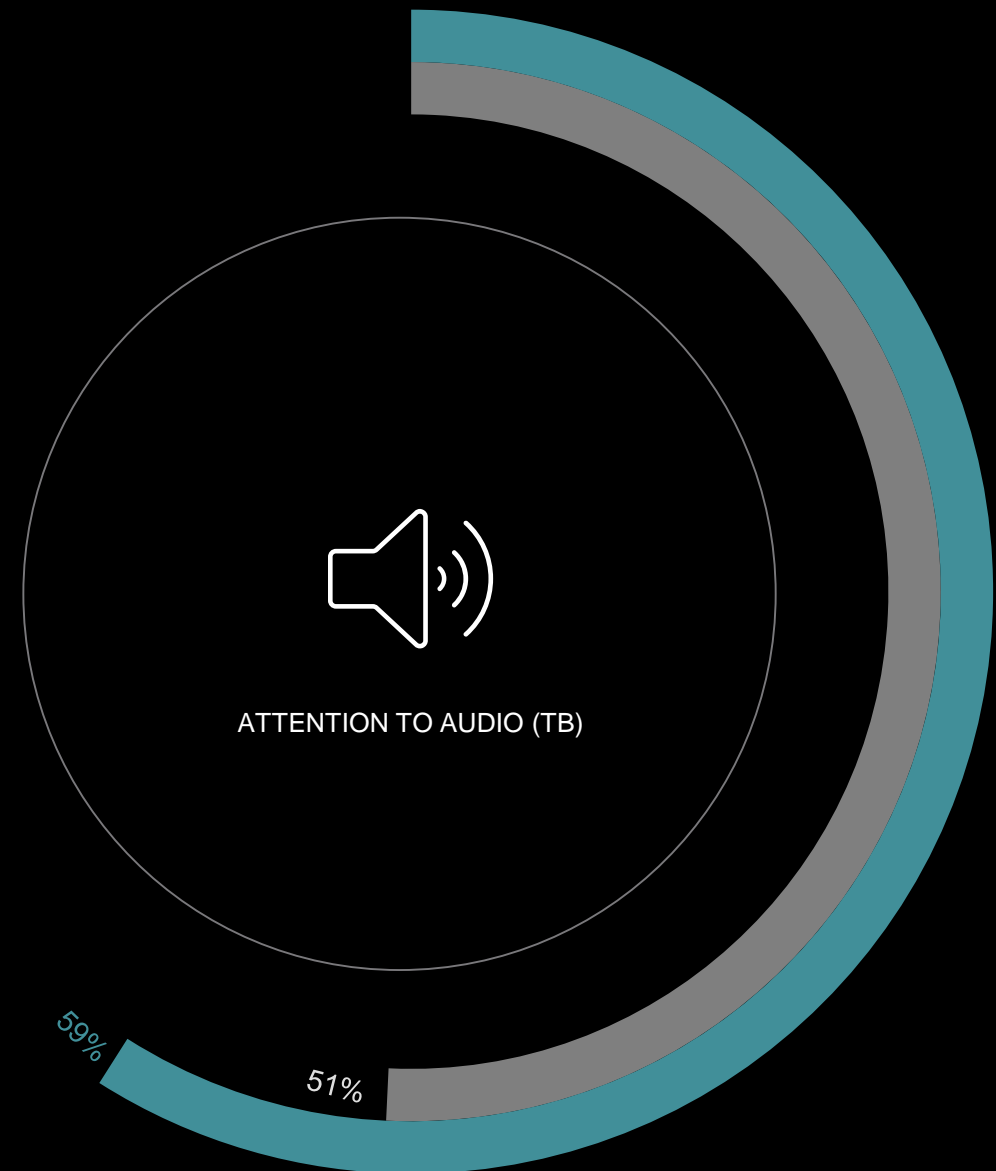


ATTENTION HIGHEST WITH MUSIC CONTENT

When targeting music content, ads should tell a story through audio.

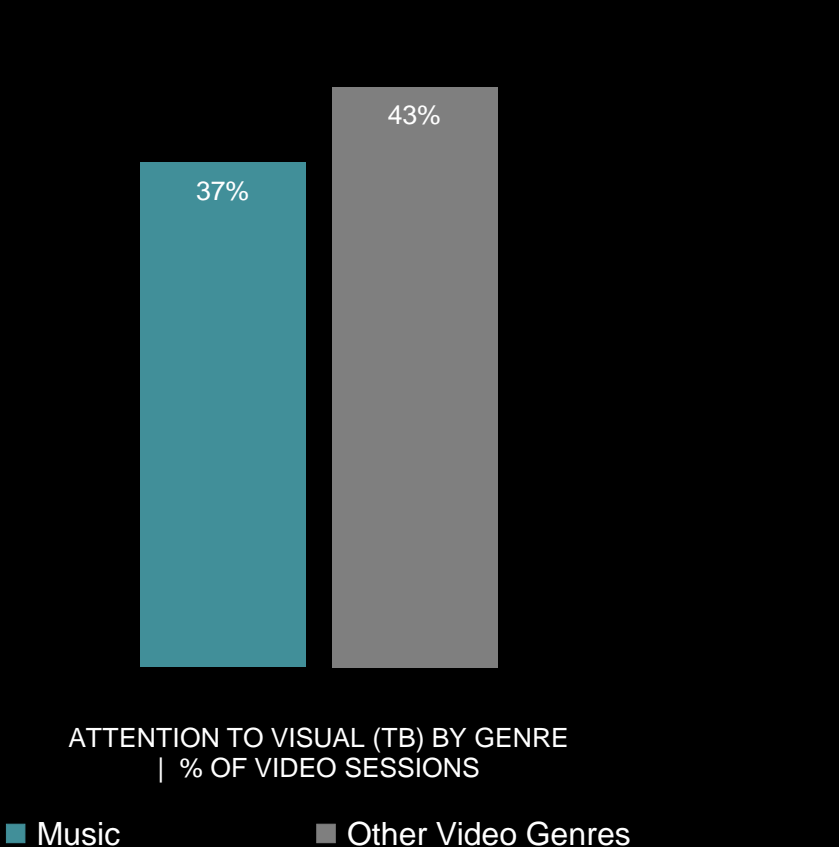
ATTENTION TO AUDIO BY GENRE | % OF VIDEO SESSIONS

■ Music ■ Other Video Genres

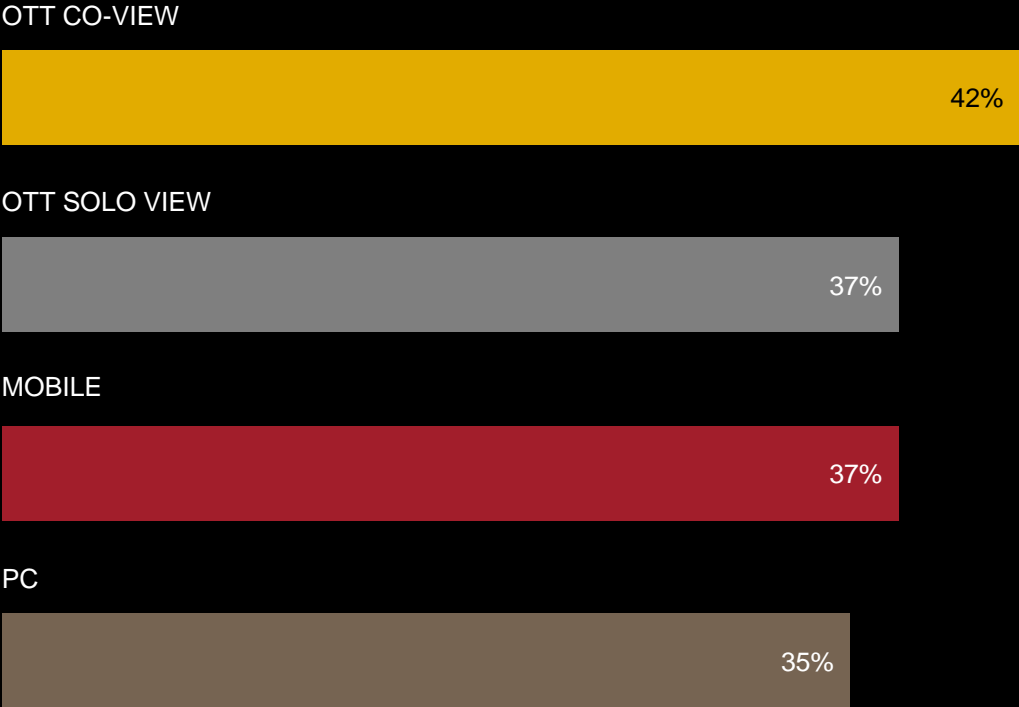


MUSIC WATCHERS ARE VISUALLY ATTENTIVE ON OTT

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



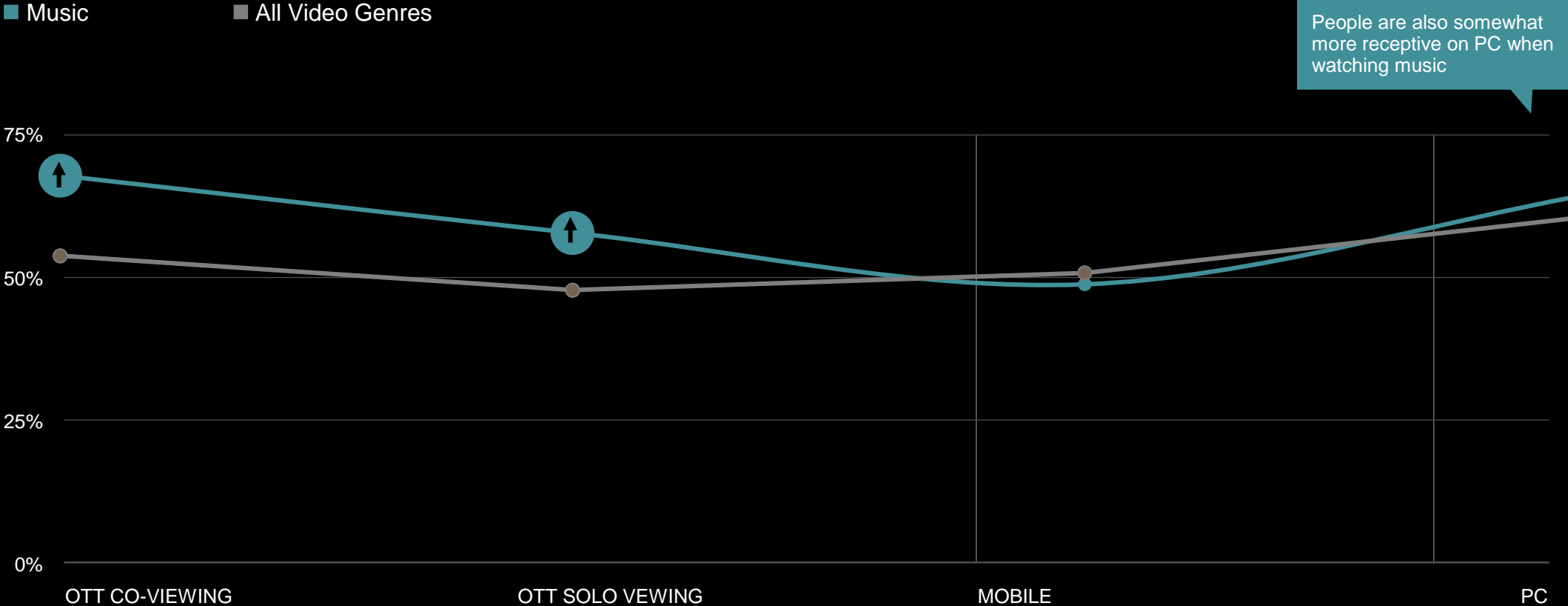
ATTENTION TO VISUAL (TB) BY DEVICE | MUSIC GENRE | % OF VIDEO SESSIONS



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



TAKEAWAYS ON MUSIC

1

Music is an uplifting video genre—people are more happy and less tired when watching music than other video genres.

2

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

3

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

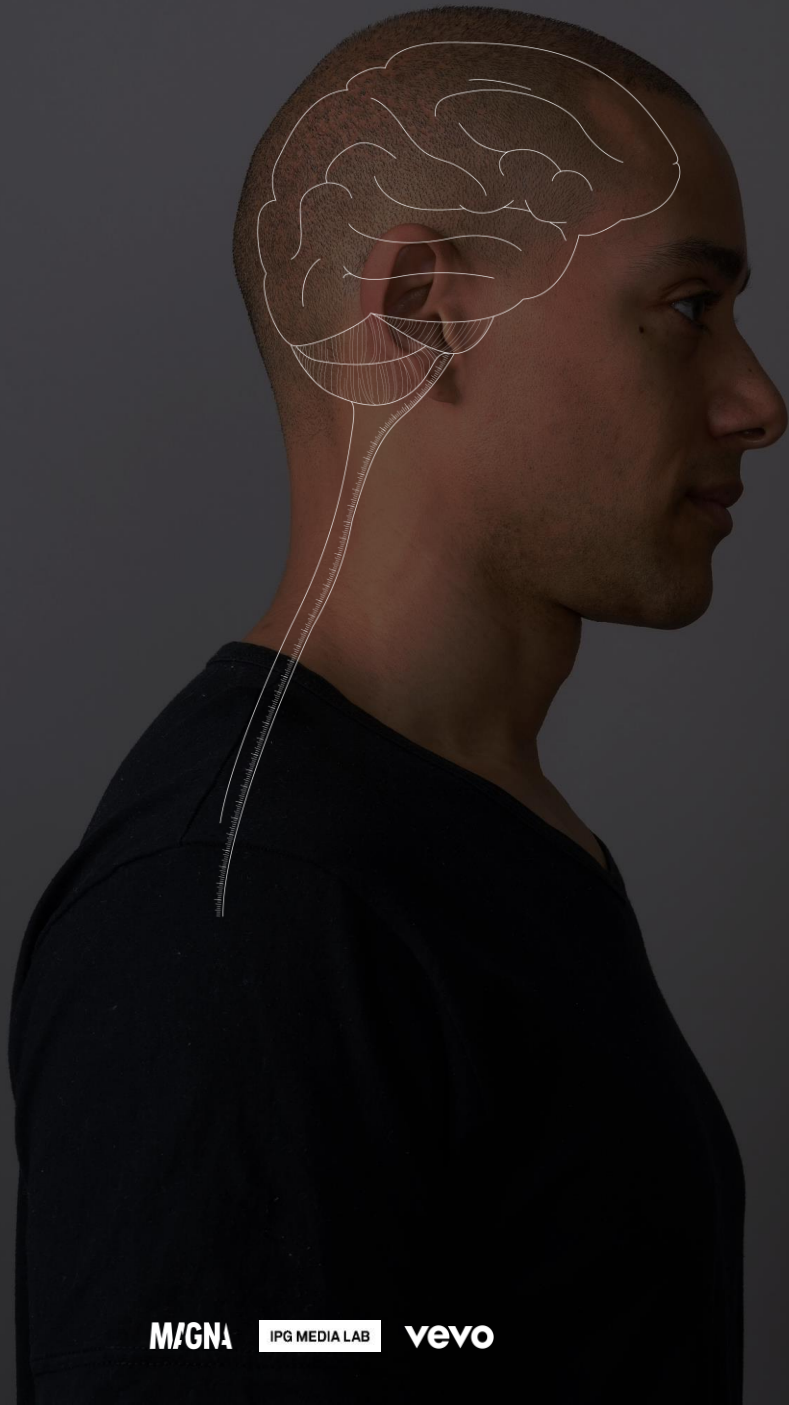
4

People are especially receptive to ads when watching music content on OTT.

WHAT NOW?

RECOMMENDATIONS





**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 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 CONTENT

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

THE ENVIRONMENT

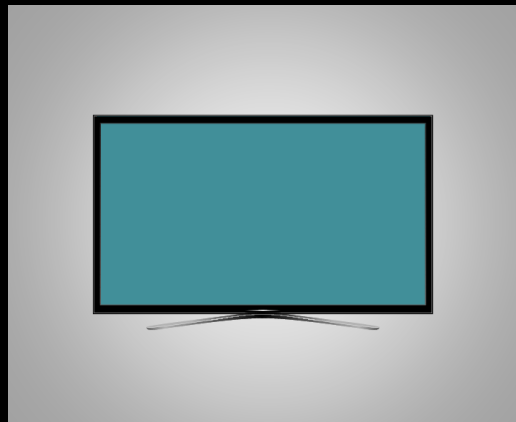
Co-viewing is all it's cracked up to be. It's intentional viewing for longer sessions with an audience open to ads

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

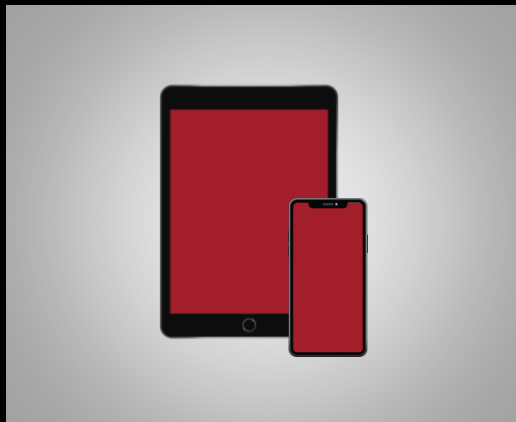
- Advertisers should leverage needs state targeting, given LTV users' relaxation purpose
- Plan for simultaneous, cross-device exposures given device-based multi-tasking

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



THANK
YOU