



Are All Screens Created Equal?

7-25-2012

A Research Study by the IPG MEDIA LAB

RESEARCH QUESTIONS

1) Does device/screen have an impact on the effectiveness of video ads?

2) Do other variables play a role in video ad effectiveness?

- Ad clutter*
- Creative quality*
- Type of video content*
- Location of consumption*

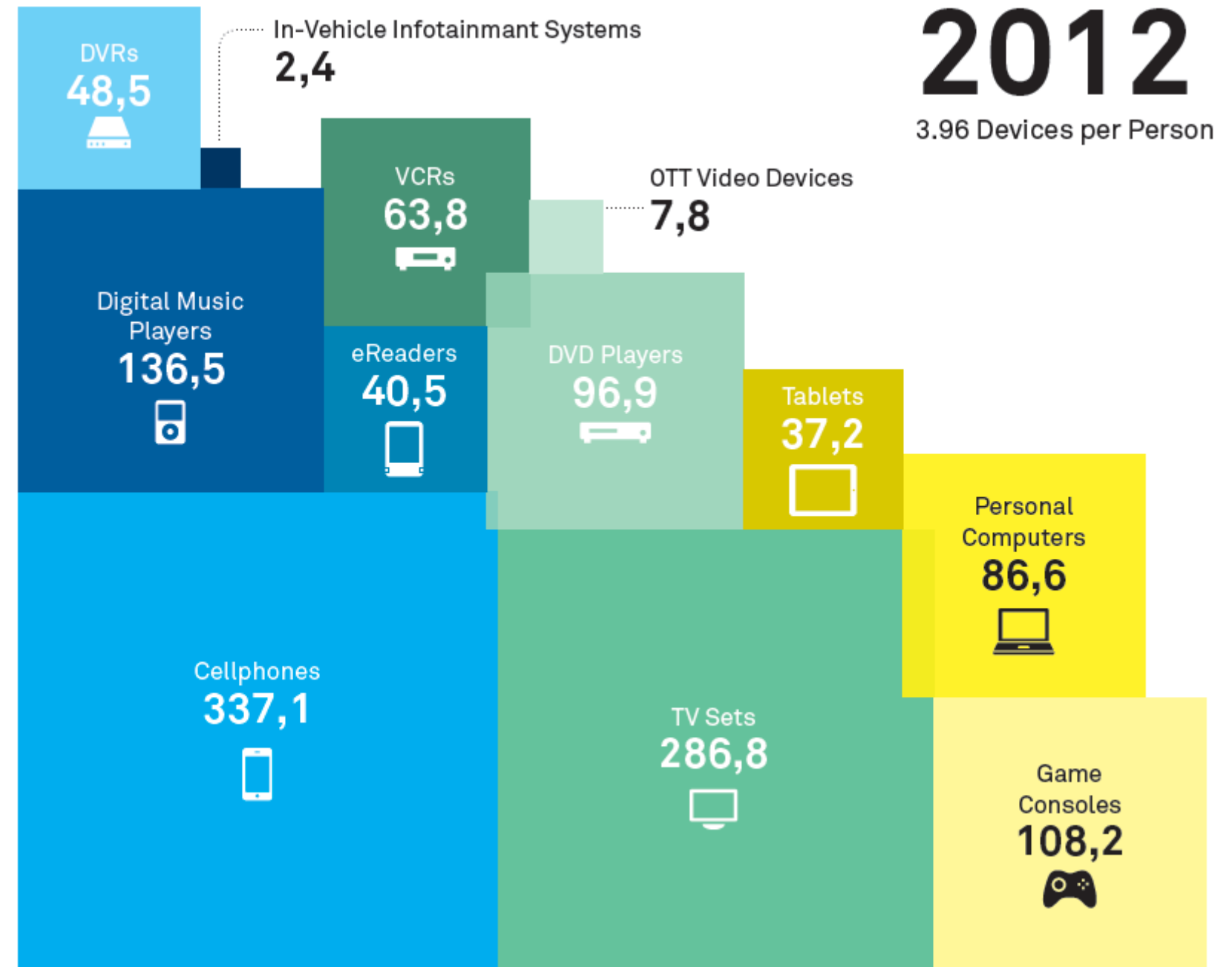
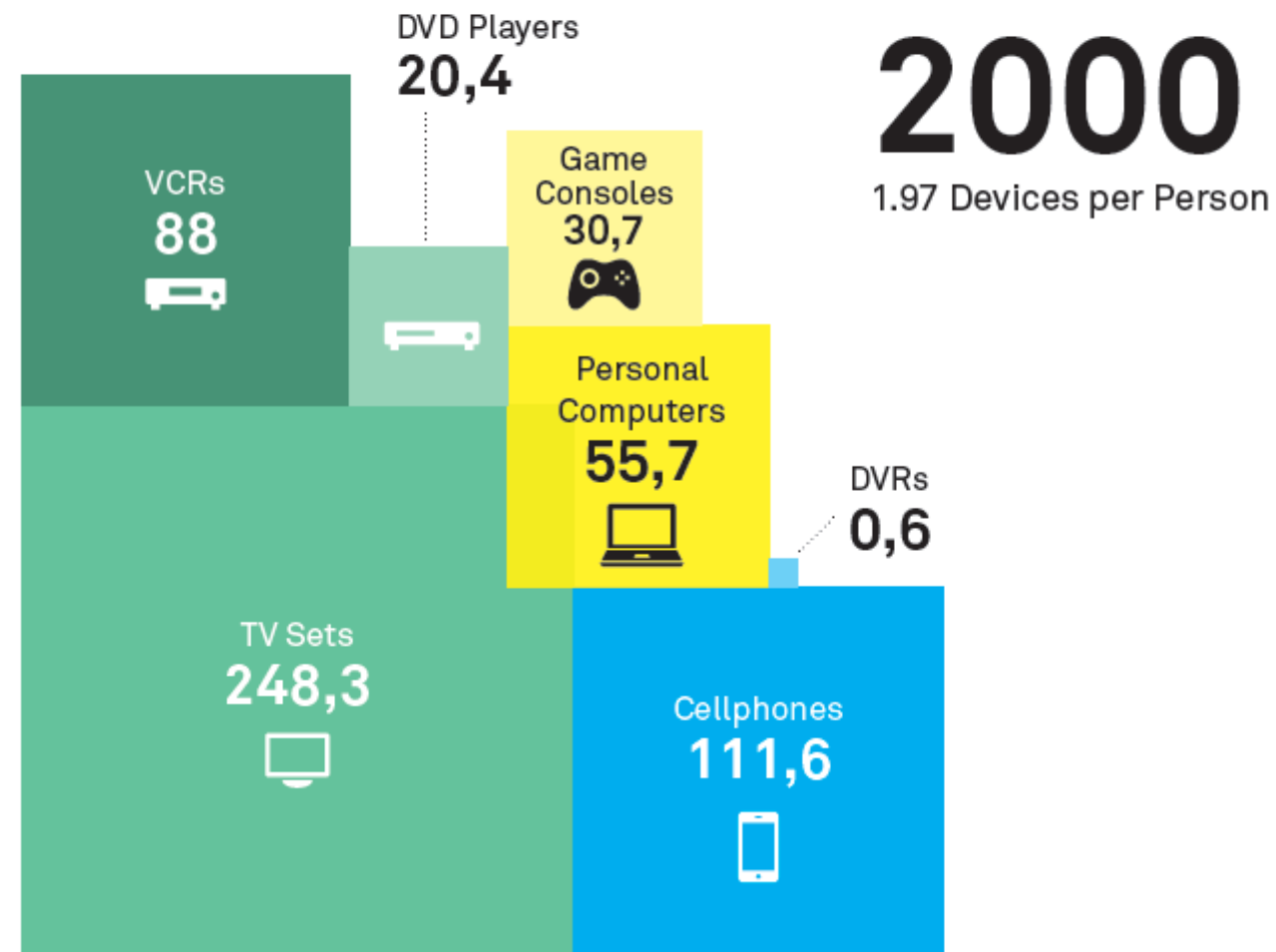
Ownership of Video Playing Devices has Skyrocketed

Average device ownership has doubled since 2000

Advertisers now have many more platform choices for communicating with consumers

MEDIA DEVICE OWNERSHIP

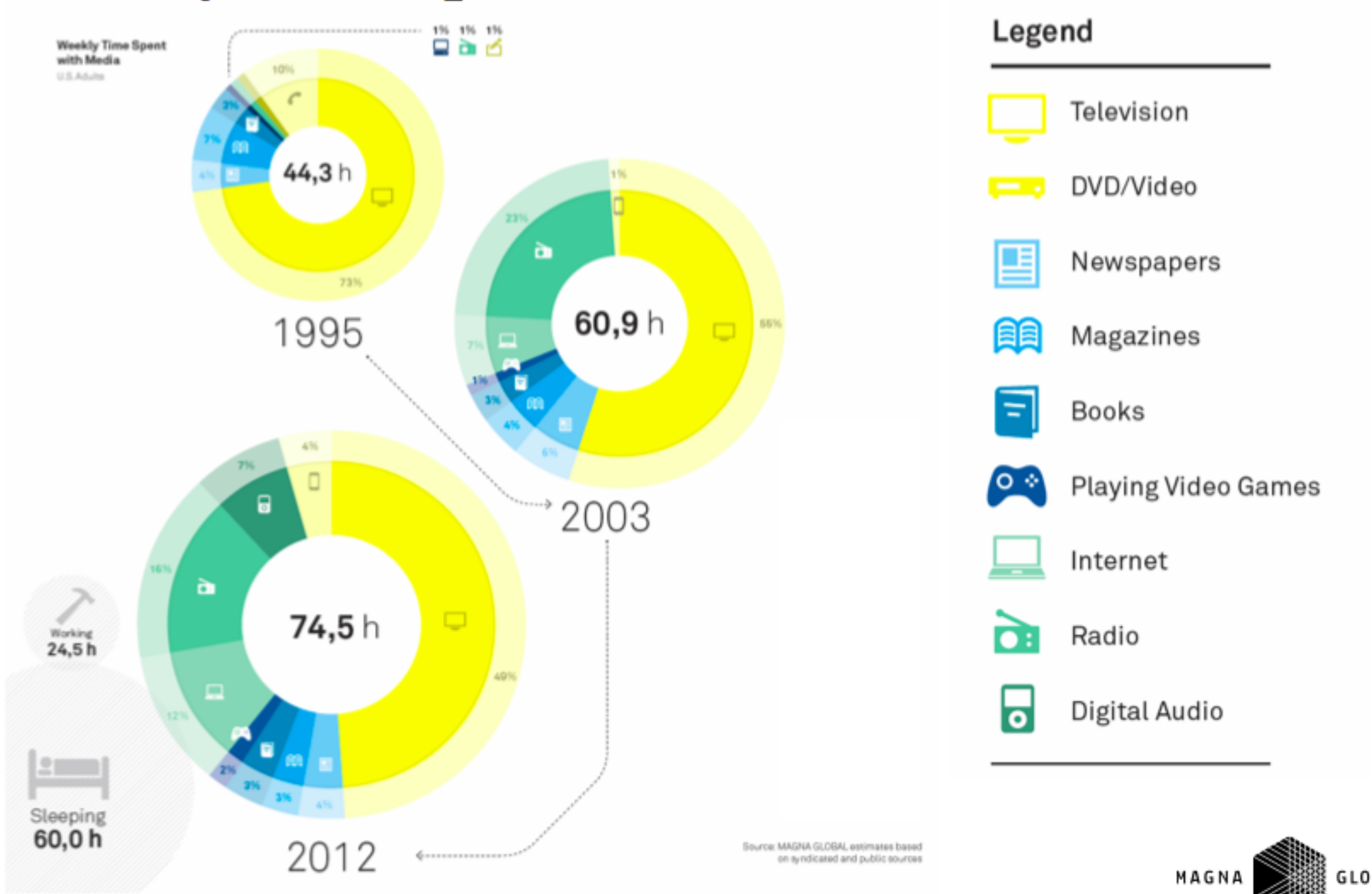
Millions of Units, U.S.



Source: MAGNA GLOBAL estimates based on syndicated and public sources

We spend more time with media than working or sleeping

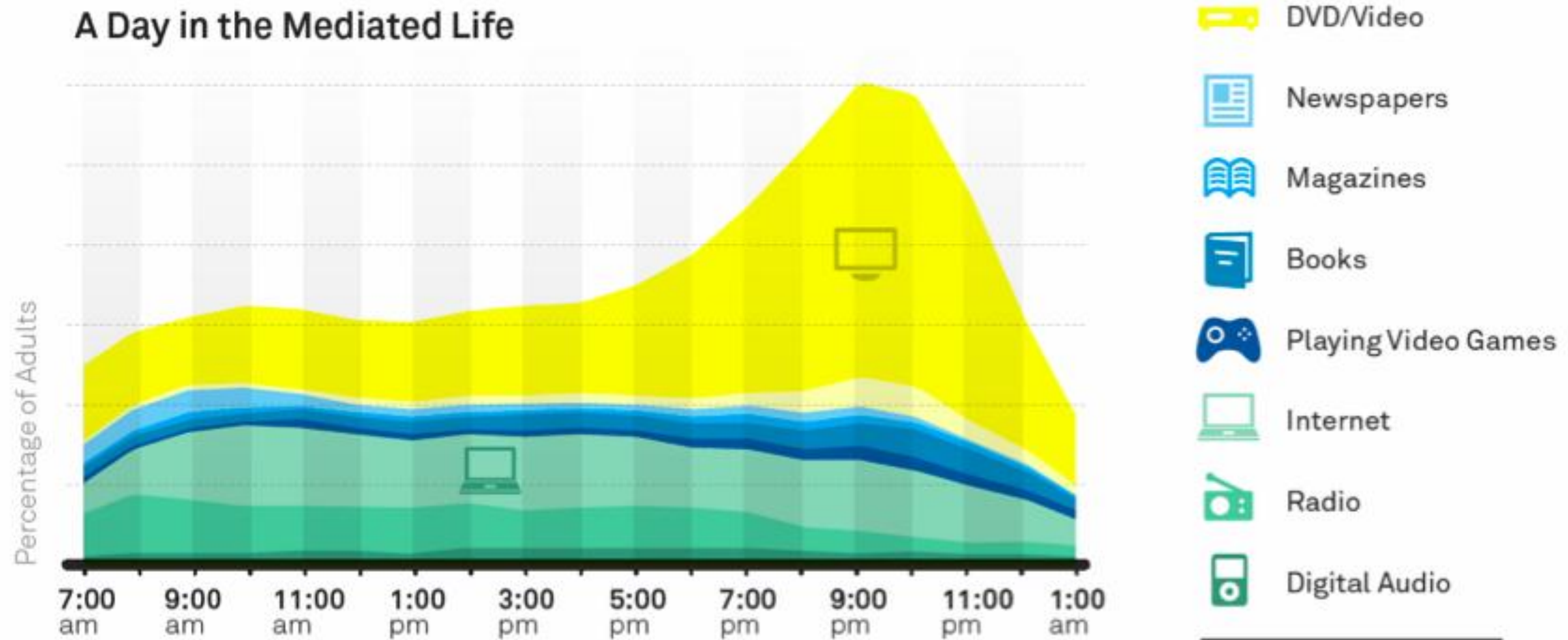
Weekly Time Spent with Media



Source: MAGNA GLOBAL estimates

We are constantly connected to media

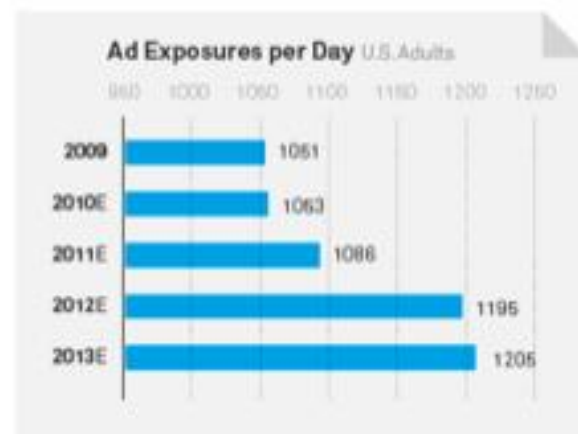
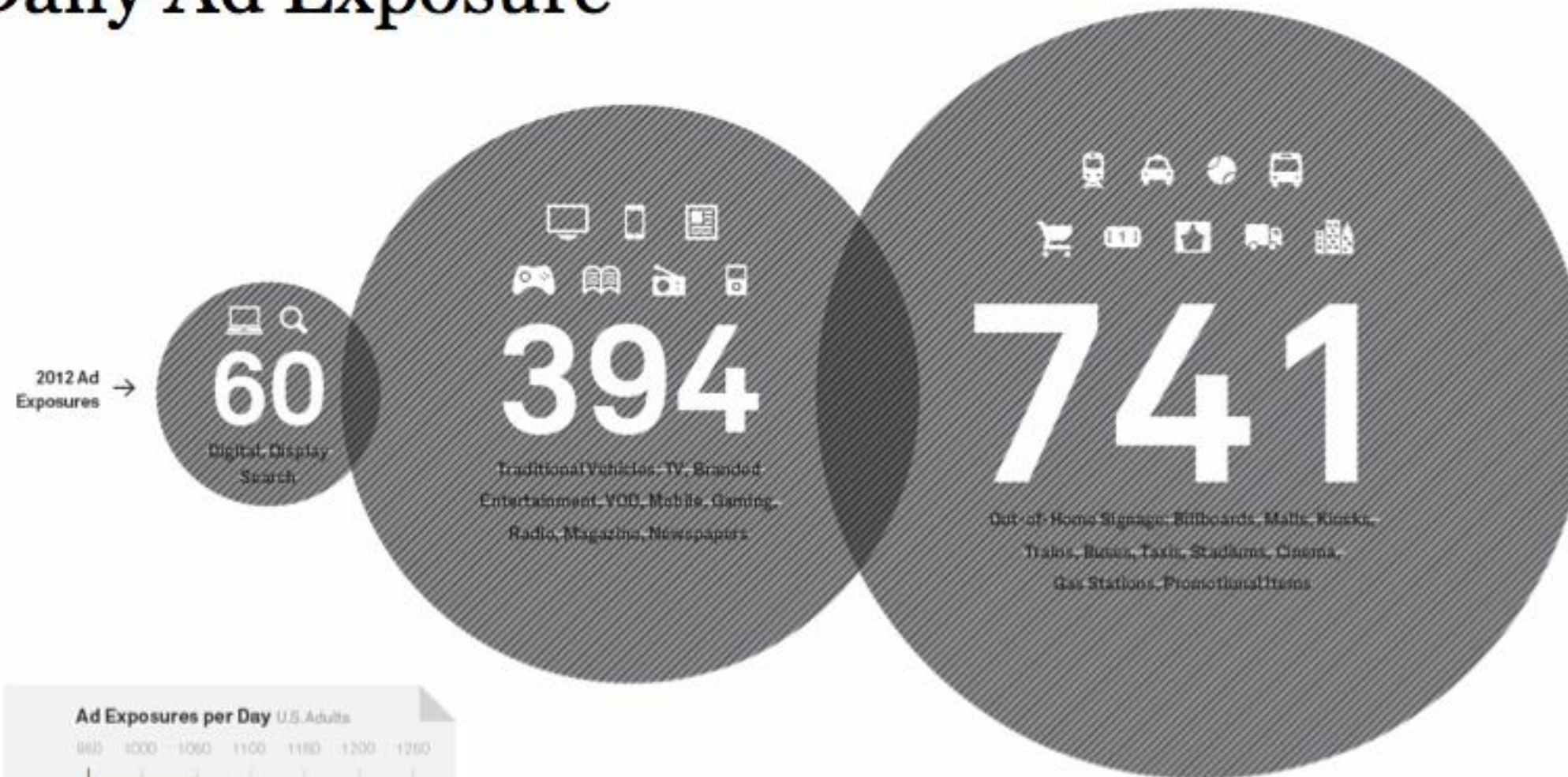
A Day in the Mediated Life



Source: UM Media in Mind, April 2012, U.S.

If consumers paid attention to all the ads they would be paralyzed

Daily Ad Exposure



Source: MAGNA GLOBAL

RESEARCH OVERVIEW

What:

In-Lab Test Across 4 Screens: Connected TV,
Linear TV, Mobile, PC

Who:

Adults 18+, familiar with at least one of the
screens, intentionally recruited tourists (n=147)

Where:

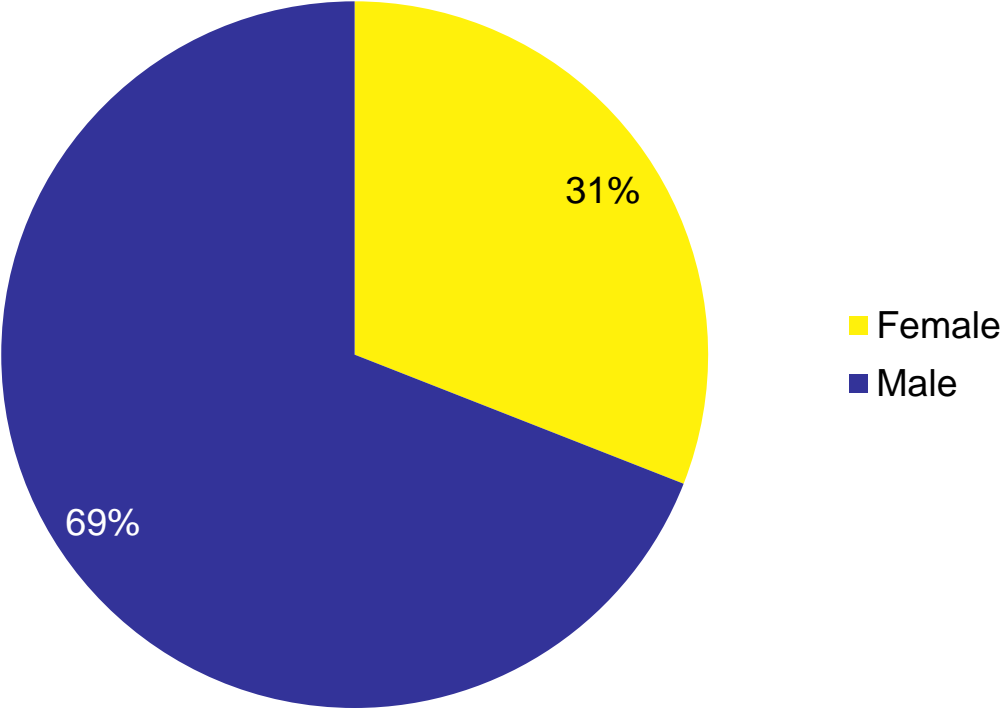
IPG Media Lab in San Francisco

When:

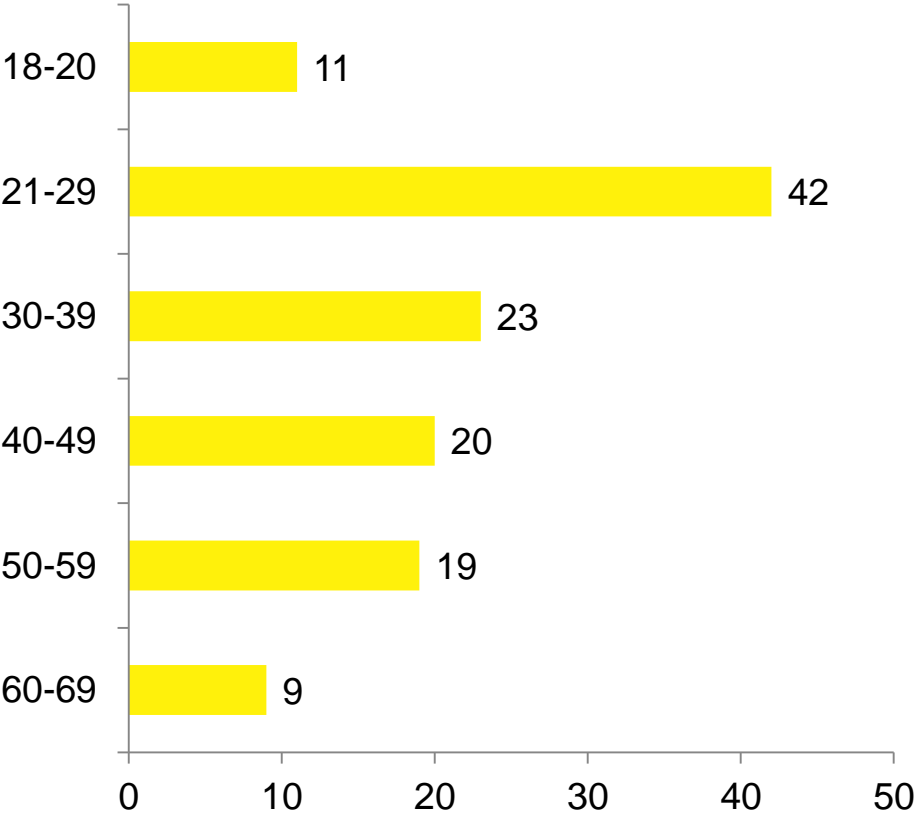
5/9/2012 – 5/14/2012

DEMOGRAPHICS

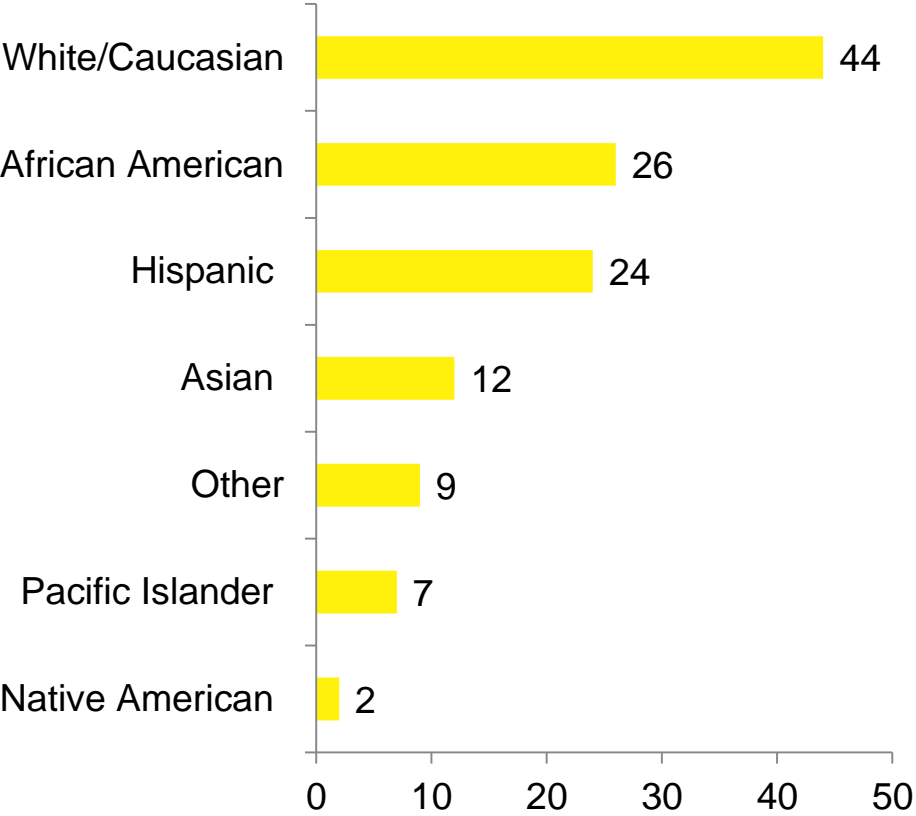
Gender



Age Range



Ethnicity



PARTICIPANT USER EXPERIENCE



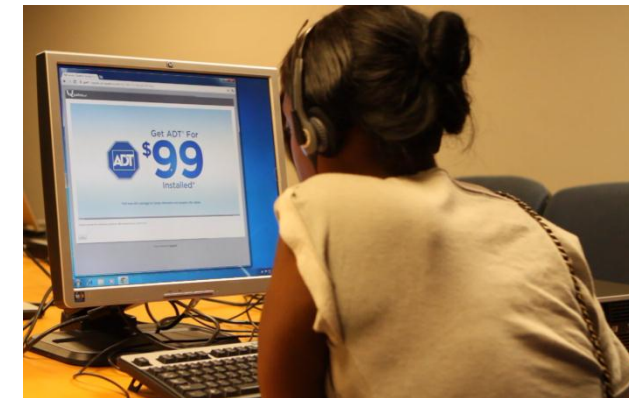
*147 participants
recruited into IPG's lab*



*Assigned to screen(s) and
content type via survey*



*Participants watched pre-
recorded videos on designated
screen(s), then answered follow-
up survey about media*



*Final Survey,
respondents
asked unaided
and aided recall
then re-exposed
to one ad*

CONTENT MATRIX

- *Content was based on participants' interests.*
- *Ads were matched to content types based on relevancy.*
- *Ad load/frequency was designed to match the typical viewer experience.*

| Screen | Avg. # of Ads | Content/Advertiser by Screen | | | |
|--------------|---------------|------------------------------|------------------|---------------------|--------------|
| | | Hip Hop | News | iFood | Syfy |
| Connected TV | 3 | Mobile Phone, Auto | Technology, Auto | Home Security, Auto | Retail, Auto |
| PC | 4 | Mobile Phone, Auto | Technology, Auto | Home Security, Auto | Retail, Auto |
| Mobile | 2 | Mobile Phone, Auto | Technology, Auto | Home Security, Auto | Retail, Auto |
| Linear TV | 11 | Mobile Phone, Auto | Technology, Auto | Home Security, Auto | Retail, Auto |

KEY METRICS

Attention

Excitement

Ad Recall

*Observed
Data*

How long do participants
visually fixate on the
screen?

Do participants show
physical signs of
excitement/arousal?

Eye-tracking hardware

tobii

Biometric bracelets

affectiva

*Self
Reported
Survey
Data*

How much attention do
participants feel they would
pay outside the lab?

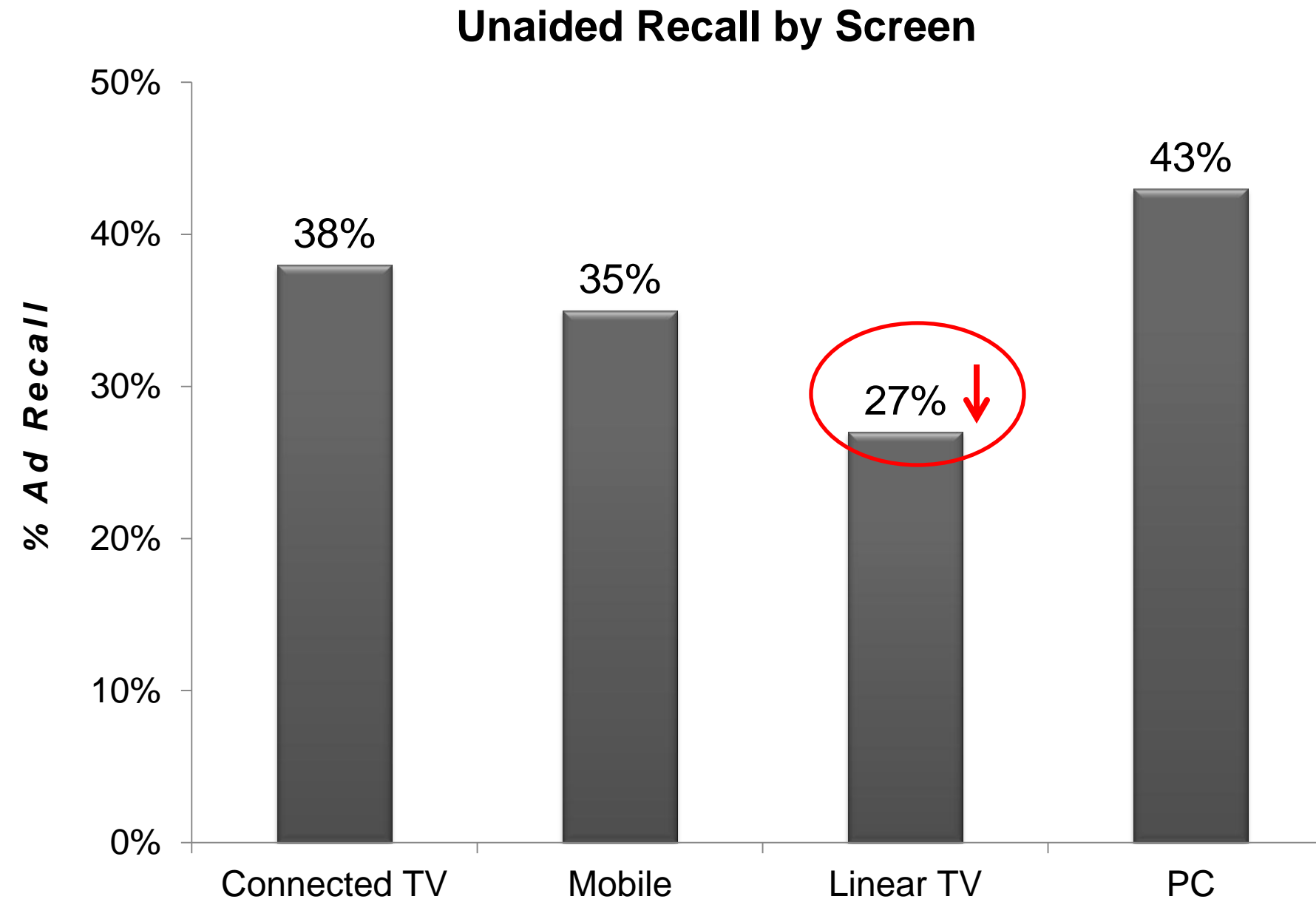
How engaging did
participants find the
content?

Did participants recall
seeing the advertisement?

Survey

Finding #01

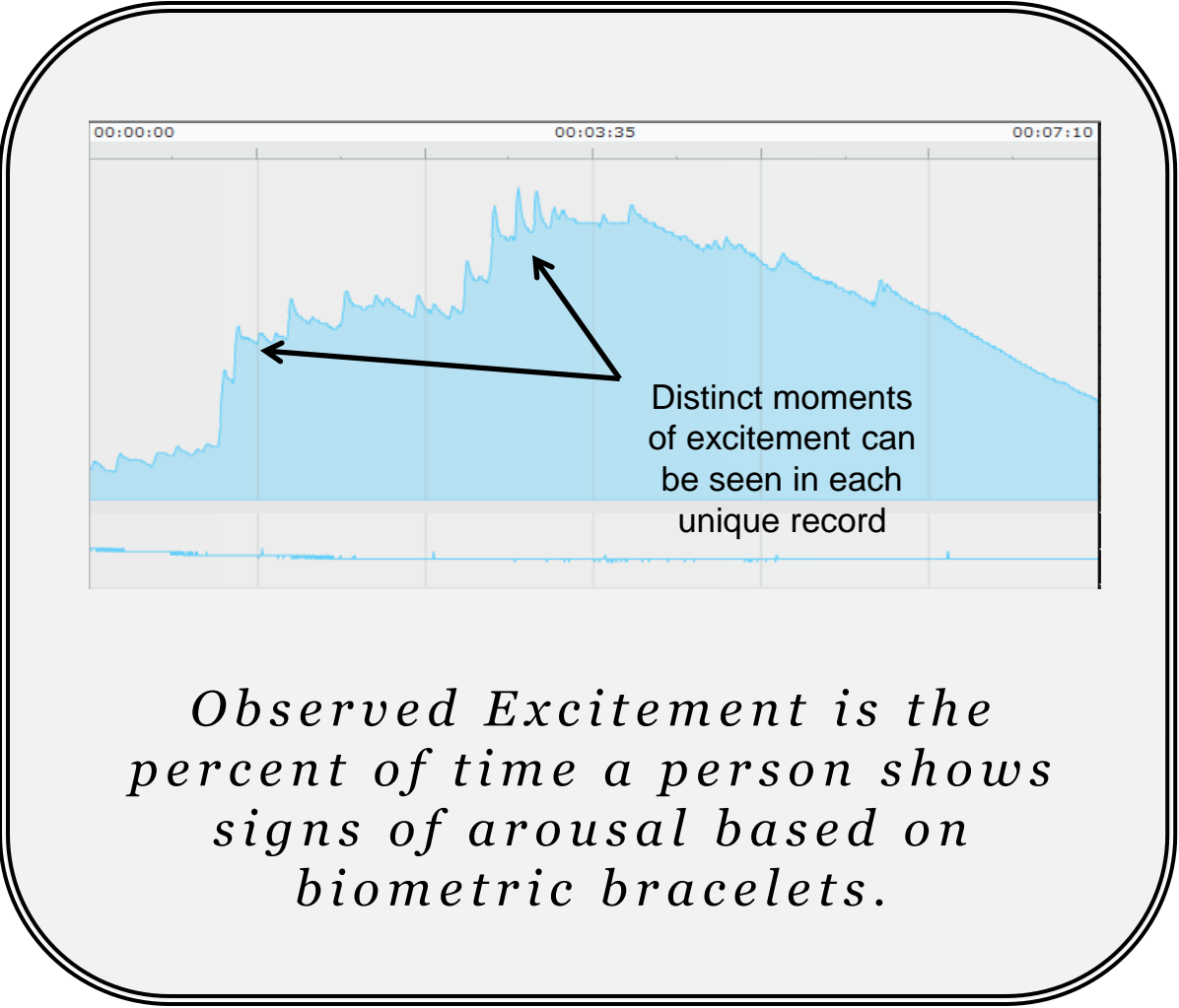
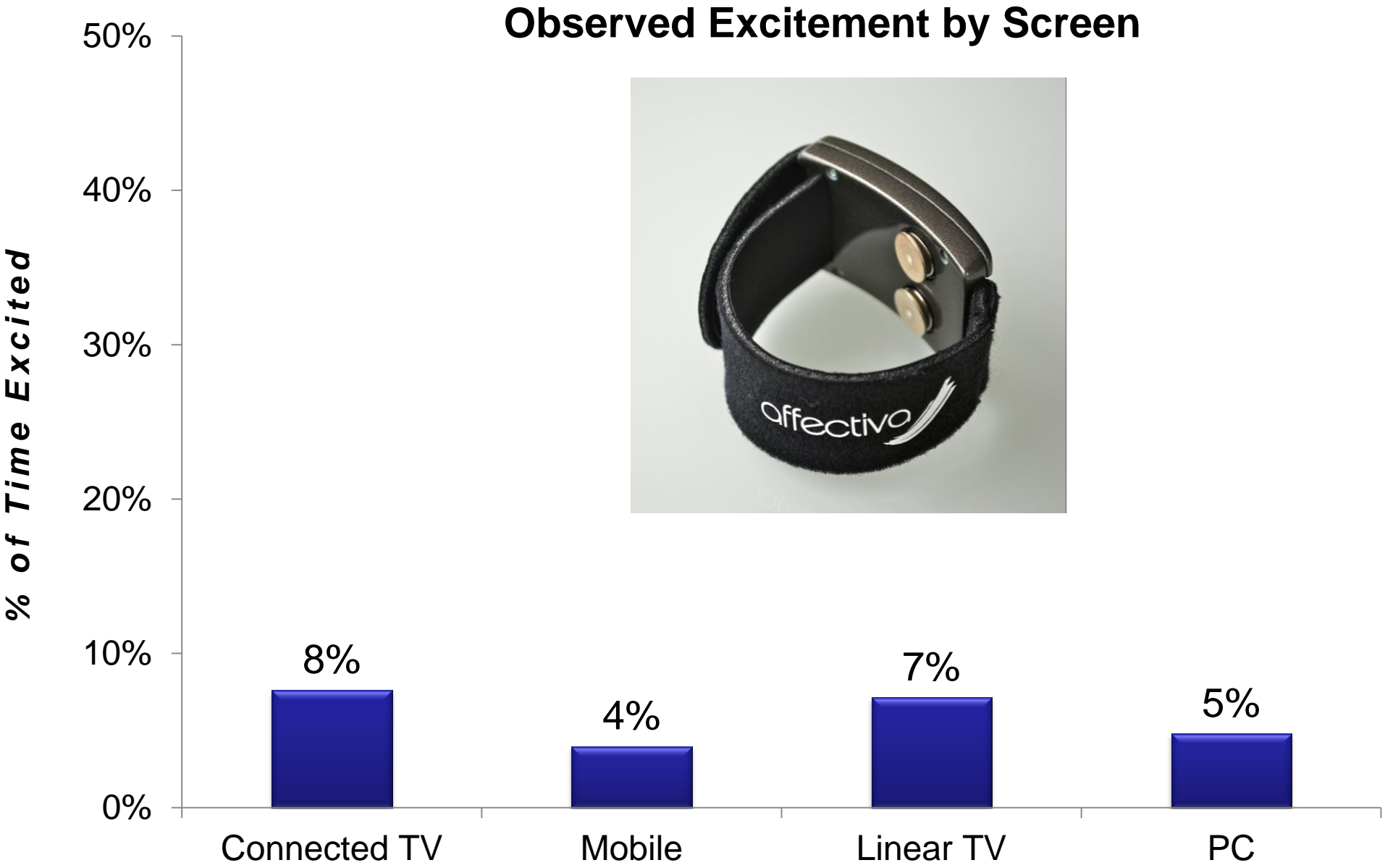
Screen type clearly plays a role in ad effectiveness, with TV lagging behind in ad recall



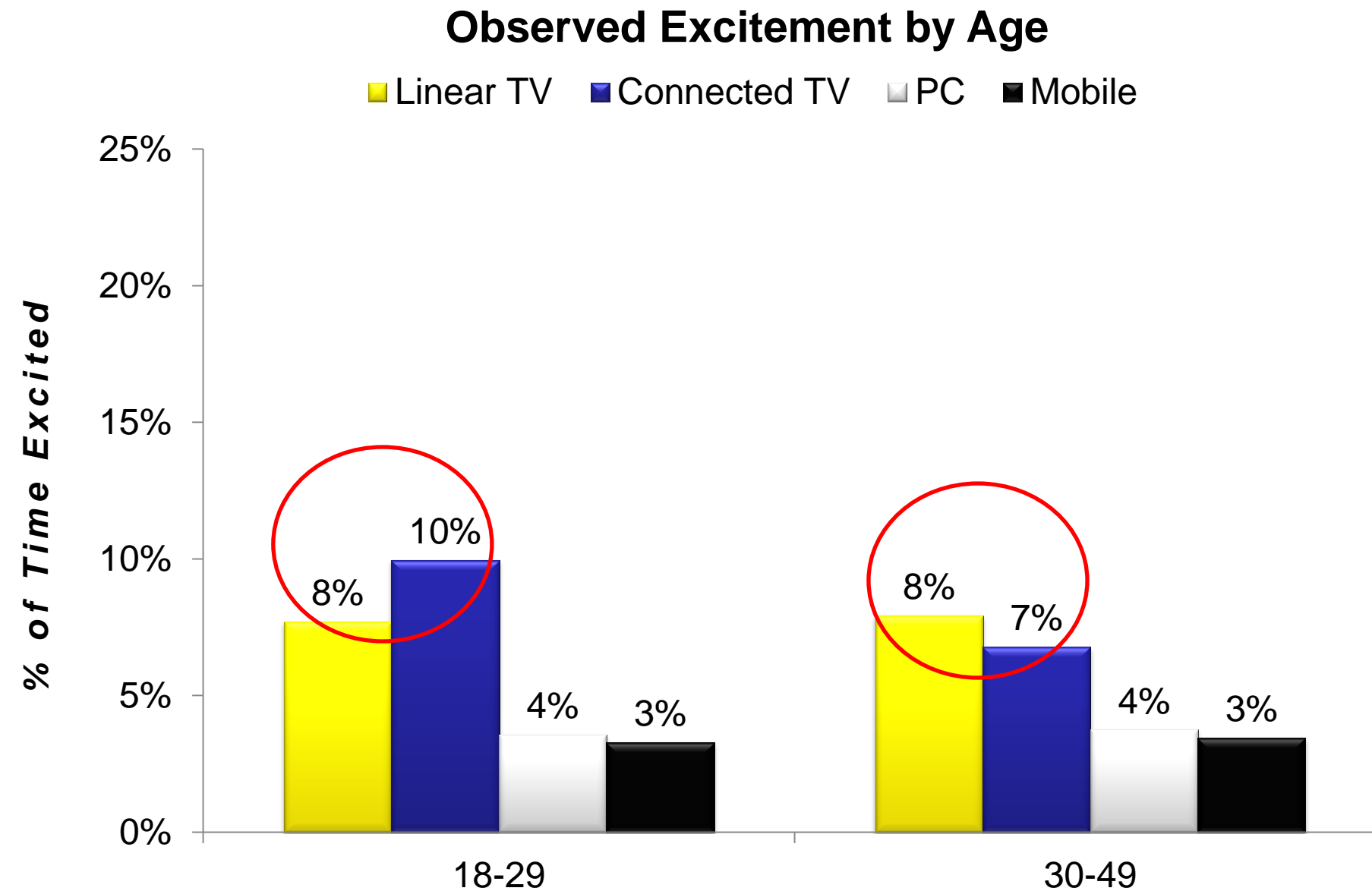
Unaided Recall is the percent of people who correctly recalled seeing the brand advertised.

↓ = Statistically lower than CTV and PC at 90% confidence
Linear TV n=64; PC n=63; Mobile n=71; CTV n=43

Finding #02
Each screen, however, elicits somewhat similar levels of arousal



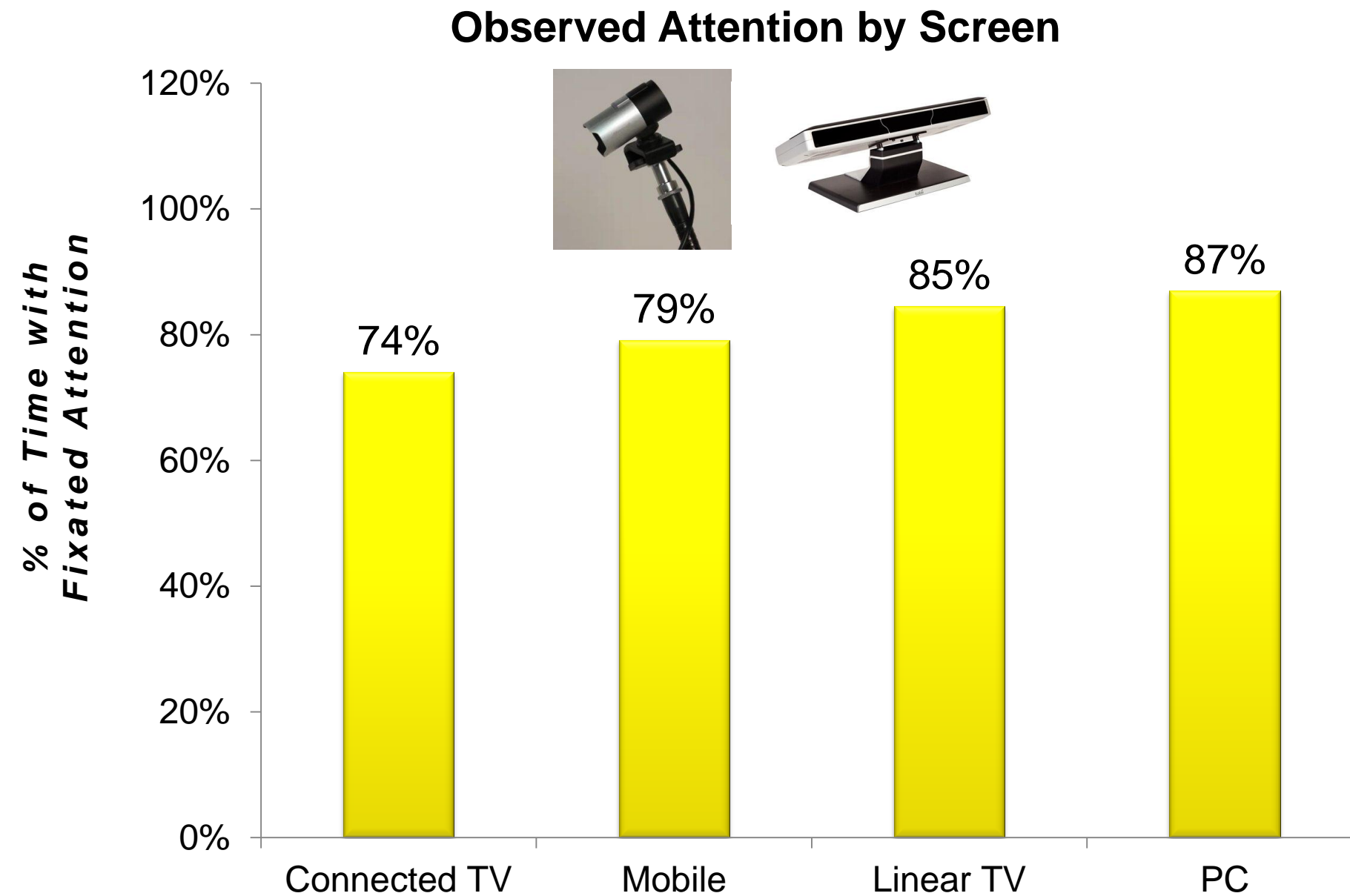
Younger viewers appear to get excited by big screens



18-29 n=77; 30-49 n=57

Finding #03

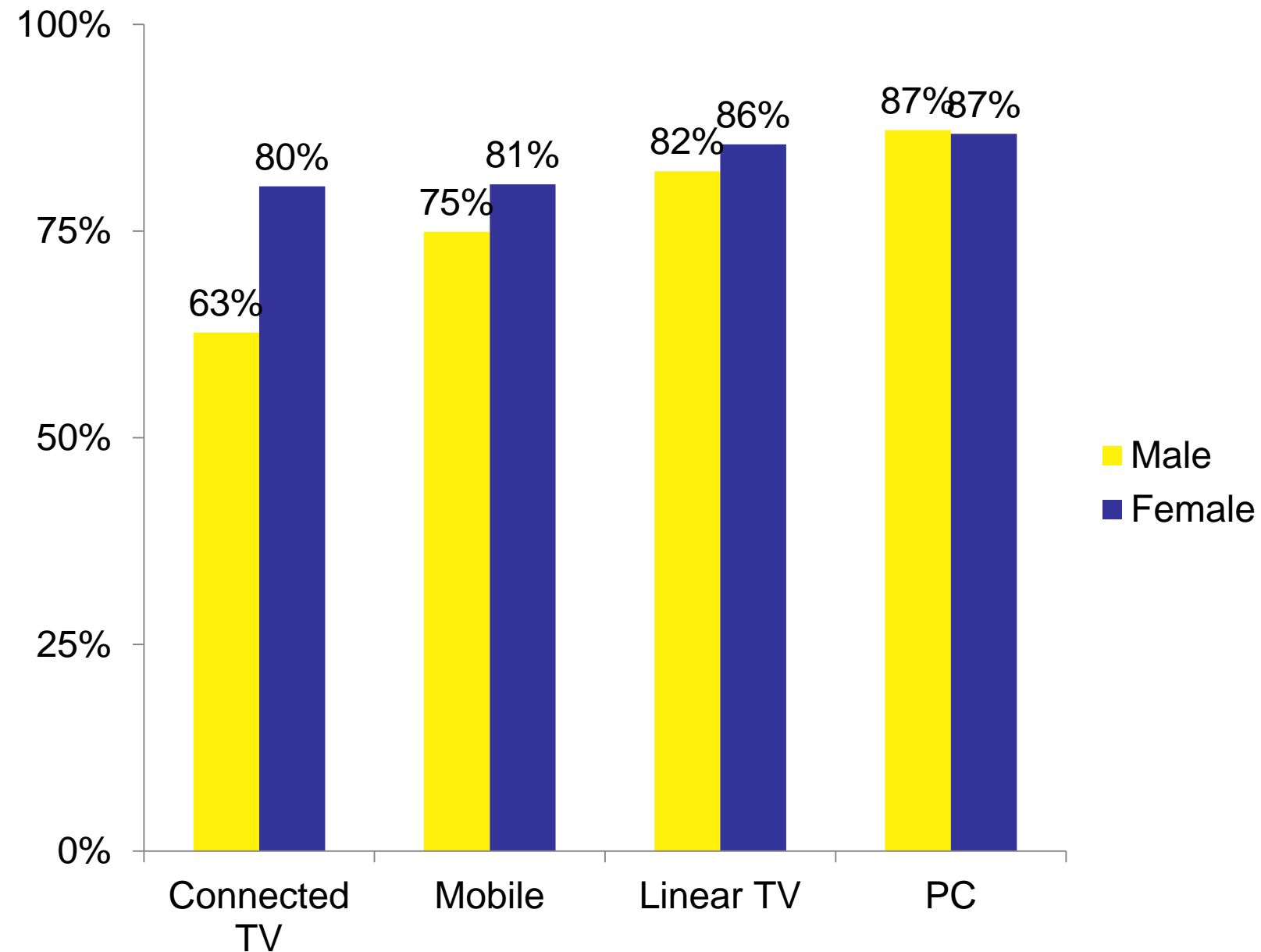
Attention levels are all high, particularly for screens consumers are most familiar with – TV and PC



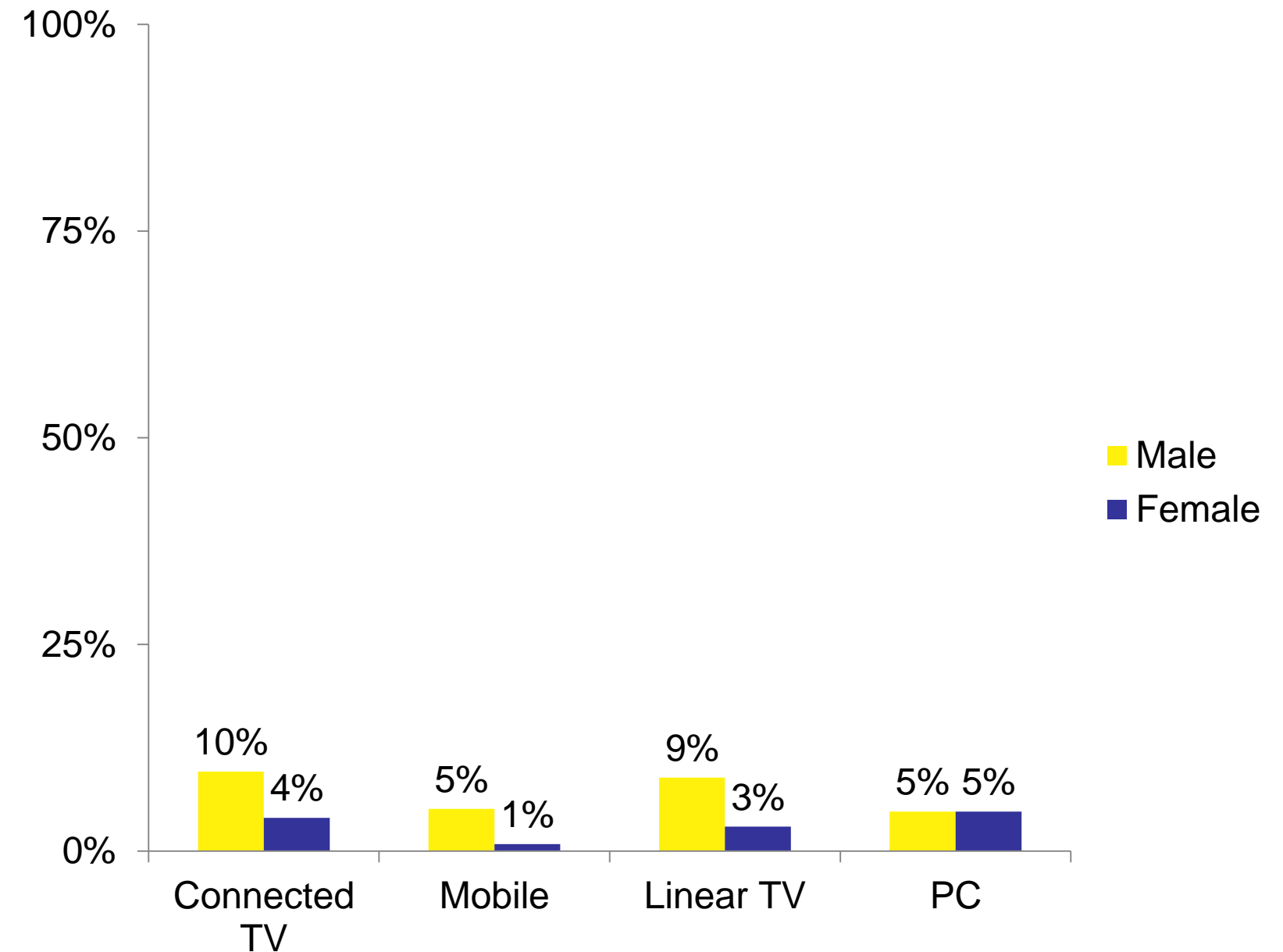
Observed Attention is the percent of time a person spends looking at the screen, based on eye-tracking data.

Females tend to be more attentive; males show higher levels of excitement

Observed Attention by Gender



Observed Excitement by Gender

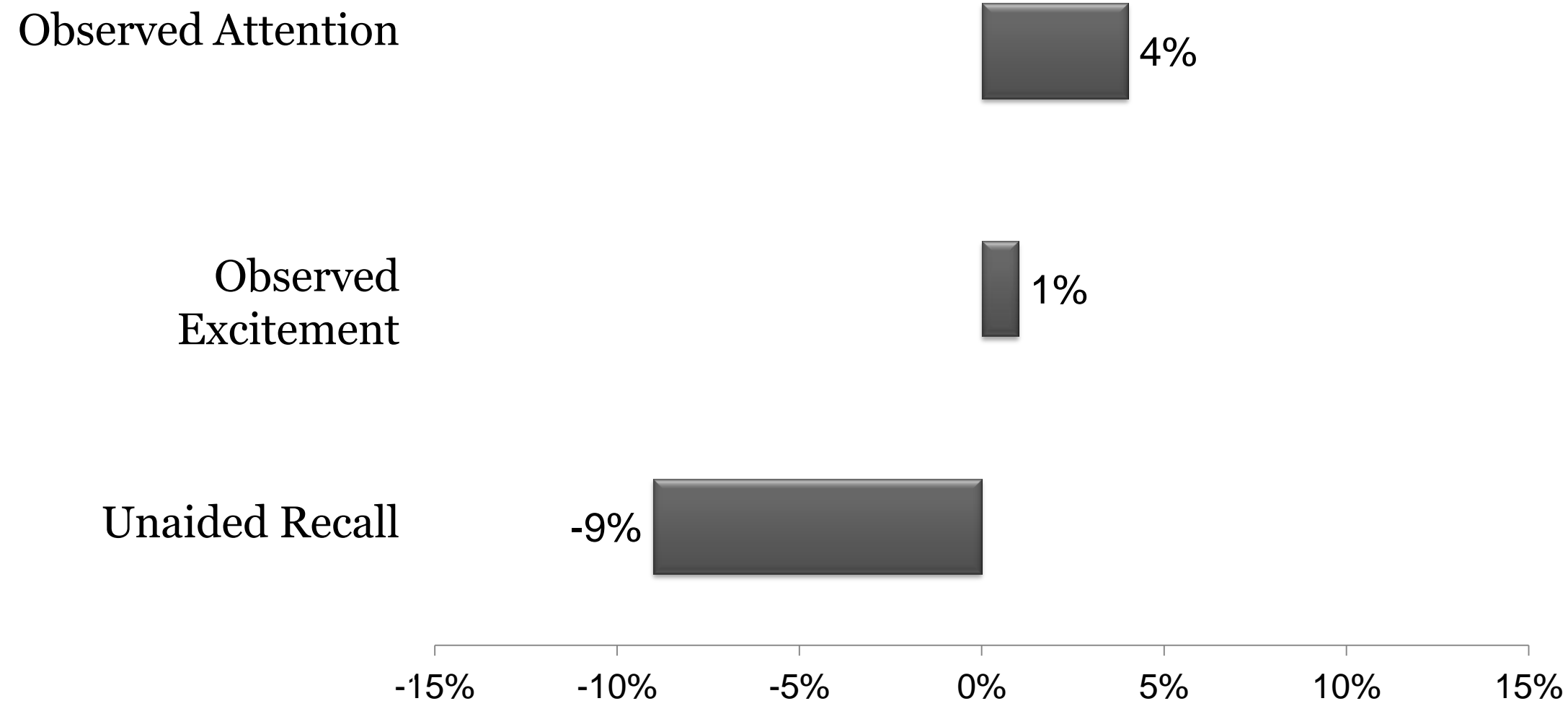


Linear TV n=40 (28 men, 12 women); CTV n=25 (16 men, 9 women); Internet 56 (35 men, 21 women); Mobile n=41 (30 men, 11 women)

Finding #04

In summary, TV performs well on attention and excitement, but that does not translate to strong recall

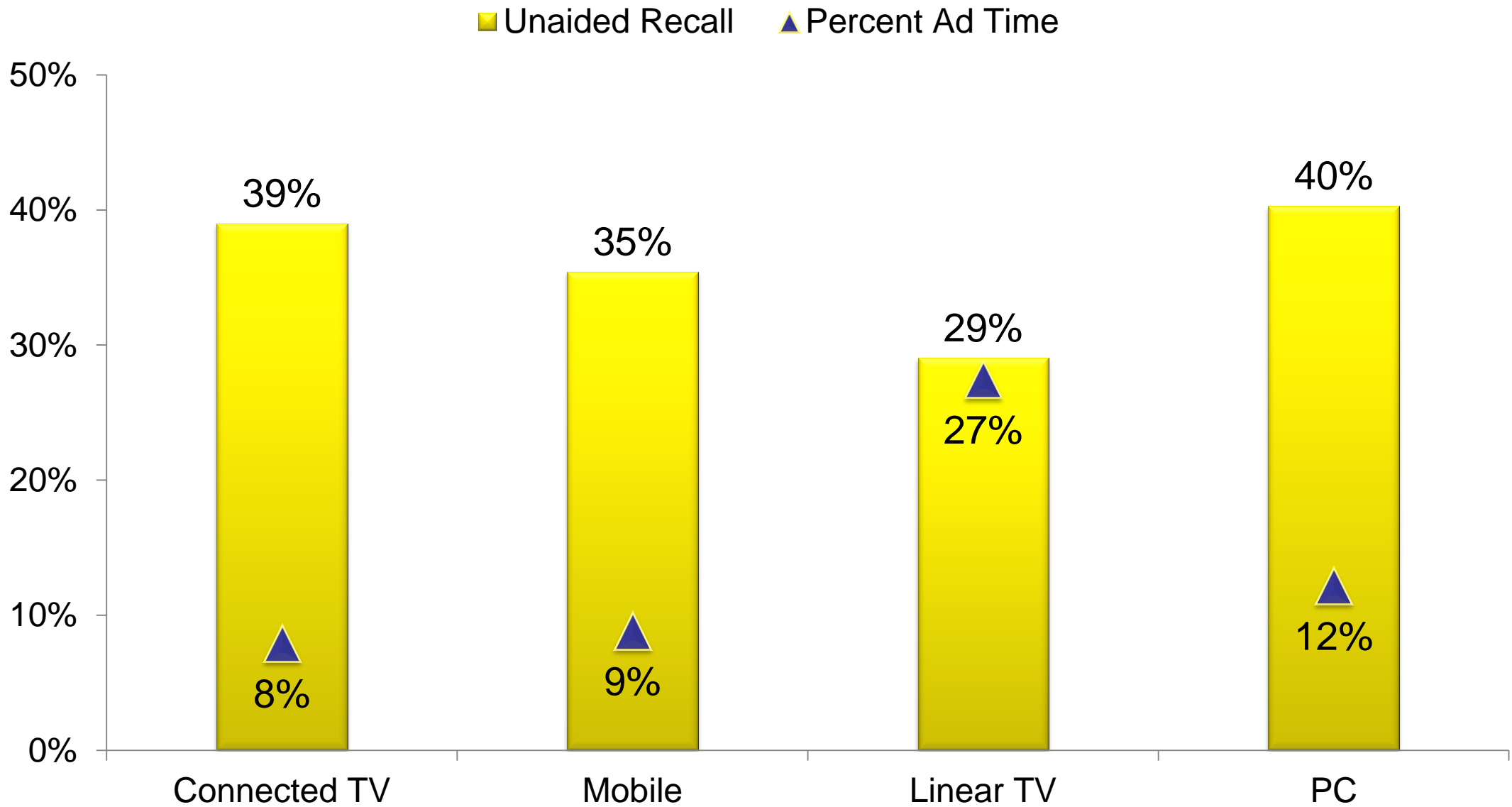
Key Metrics for Linear TV (Δ from Average)



Finding #05

Ad clutter appears to undermine the ad effectiveness of TV

Unaided Recall & Ad Clutter by Screen



Ad to Content Ratio

TV = 16 out of 60 minutes
(27% ads)

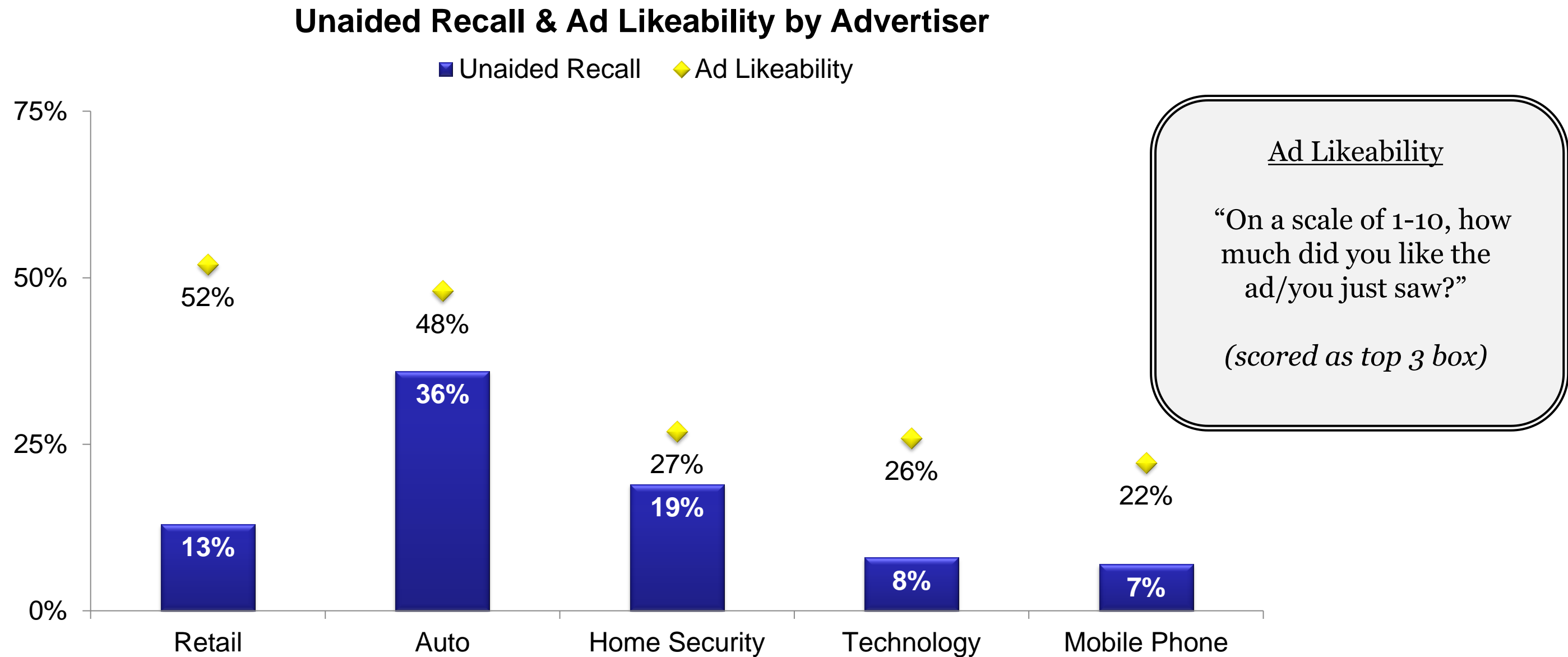
Hulu = 6 out of 60
minutes (10% ads)

YuMe = 5 out of 60
minutes (8% ads)

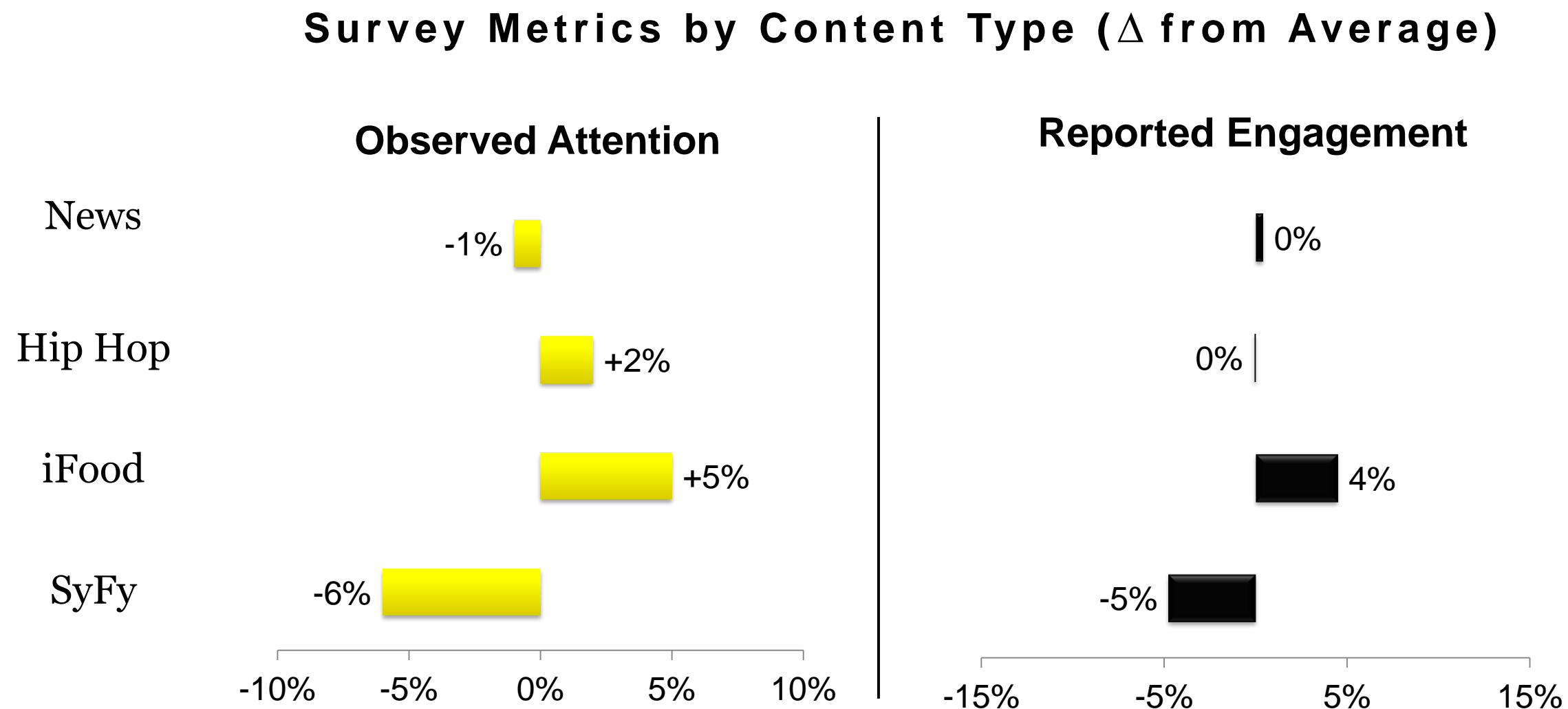
Finding #06

As expected, creative quality is a strong driver of ad recall

For the most part, ad effectiveness aligns with reported ad likeability



Finding #07
Content must be engaging to attract and hold attention



Observed Attention/Observed Excitement: News n=53; Hip Hop n=41; iFood n=49; SyFy n=32;

Finding #08

Regardless of the screen, consumers are most likely to watch video in comfortable spots, such as the couch or in bed

Location by Screen

| Where do you typically watch...? | Mobile | PC | Connected TV | Linear TV | Total |
|----------------------------------|--------|----|--------------|-----------|-------|
| Home, on the couch | 33 | 26 | 24 | 35 | 118 |
| Home, in bed | 23 | 19 | 12 | 18 | 72 |
| Home, sitting at a desk or table | 14 | 18 | 7 | 9 | 48 |
| Home, while doing an activity | 11 | 9 | 11 | 12 | 43 |
| Office | 4 | 3 | | | 7 |
| Other, Neither Home nor Work | 6 | 9 | 3 | 4 | 22 |
| n= | 91 | 84 | 57 | 78 | |

Finding #09

Surroundings also play a role in ad effectiveness, with consumers particularly attentive while in bed

Greater attentiveness is likely related to less multi-tasking and distraction in bed

Reported Attention by Location/Screen
(10=Max)

| How much attention do you give when you watch x in y location? | Mobile | PC | Connected TV | Linear TV | Total |
|--|--------|-----|--------------|-----------|-------|
| Home, on the couch | 6.2 | 7.3 | 6.1 | 6.3 | 6.4 |
| Home, in bed | 6.6 | 7.4 | 5.7 | 7.4 | 6.8 |
| Home, sitting at a desk or table | 5.8 | 7.1 | 7.9 | 6.8 | 6.8 |
| Home, while doing an activity | 5.0 | 6.1 | 5.0 | 4.4 | 5.1 |
| Office | 5.5 | 6.7 | | | 6.0 |
| Other, Neither Home nor Work | 5.5 | 6.7 | | | 6.0 |
| n= | 91 | 84 | 57 | 78 | |

Are All Screens Created Equal?

- 1) *Overall, the much-hyped screen size did not play a role in ad effectiveness.*
- 2) *However, other controllable variables did – 3C's.*

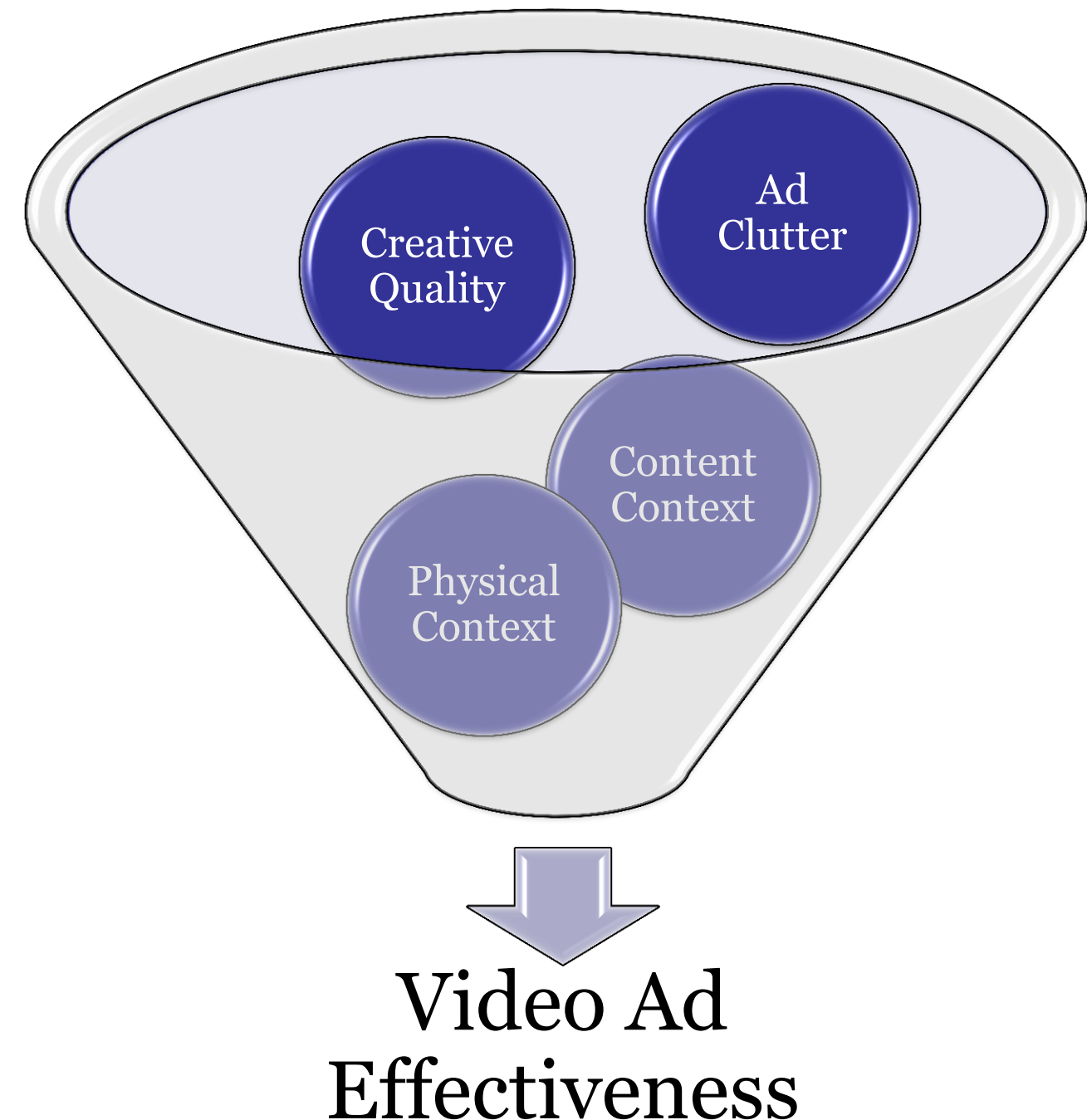
Clutter – *TV was effective at garnering attention and eliciting emotion, but fell short on ad break-through because of clutter*

Creative – *Ad effectiveness varied greatly by ad*

Context -

Content – *Most engaging content attracted the most attention*

Physical – *Lean-back environments with less distraction, such as at home in bed, enhance attentiveness*



IMPLICATIONS

- 1) *Clutter free environments, regardless of screen size, are a good value*
- 2) *Advertisers without media budgets for high GRP TV campaigns, should consider moving to screens with less ad clutter to ensure campaign break-through*
- 3) *Creative testing is strongly recommended when at all possible – digital video great platform for testing different ad creatives to find the best*
- 4) *Couch is now the ultimate multi-screen environment, while the bed is the ultimate single-screen environment*
- 5) *Since Primetime is companion media time, consider buying placements across devices during this day part when planning for duplication*
- 6) ***Connected TV is TV without the clutter—the benefits of attentiveness and emotion, with better chance for ad break-through***



THANK YOU!
