Are All Screens Created Equal?
A Research Study by the IPG MEDIA LAB
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

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 based on syndicated and public sources
We are constantly connected to media

A Day in the Mediated Life

Source: MAGNA GLOBAL estimates based on syndicated and public sources
If consumers paid attention to all the ads they would be paralyzed

Daily Ad Exposure

Source: MAGNA GLOBAL estimates based on syndicated and public sources
# 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
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.*

<table>
<thead>
<tr>
<th>Screen</th>
<th>Avg. # of Ads</th>
<th>Content/Advertiser by Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Hip Hop</td>
</tr>
<tr>
<td>Connected TV</td>
<td>3</td>
<td>Mobile Phone, Auto</td>
</tr>
<tr>
<td>PC</td>
<td>4</td>
<td>Mobile Phone, Auto</td>
</tr>
<tr>
<td>Mobile</td>
<td>2</td>
<td>Mobile Phone, Auto</td>
</tr>
<tr>
<td>Linear TV</td>
<td>11</td>
<td>Mobile Phone, Auto</td>
</tr>
</tbody>
</table>
KEY METRICS

**Attention**
- How long do participants visually fixate on the screen?

**Excitement**
- Do participants show physical signs of excitement/arousal?

**Ad Recall**
- 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?

**Observed Data**
- Eye-tracking hardware: tobii
- Biometric bracelets: affectiva

**Self Reported Survey Data**
- How much attention do participants feel they would pay outside the lab?
Finding #01
Screen type clearly plays a role in ad effectiveness, with TV lagging behind in ad recall

Unaided Recall by Screen

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

Connected TV n=43; Mobile n=71; Linear TV n=64; PC n=63

Observed Excitement is the percent of time a person shows signs of arousal based on biometric bracelets.
Finding #03

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

Observed Attention by Screen

- Connected TV: 74%
- Mobile: 79%
- Linear TV: 85%
- PC: 87%

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

Connected TV n=43; Mobile n=71; Linear TV n=64; PC n=63
Females tend to be more attentive; males show higher levels of excitement

### Observed Attention by Gender

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connected TV</td>
<td>80%</td>
<td>63%</td>
</tr>
<tr>
<td>Mobile</td>
<td>81%</td>
<td>75%</td>
</tr>
<tr>
<td>Linear TV</td>
<td>86%</td>
<td>82%</td>
</tr>
<tr>
<td>PC</td>
<td>87%</td>
<td>87%</td>
</tr>
</tbody>
</table>

### Observed Excitement by Gender

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connected TV</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Mobile</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Linear TV</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>PC</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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)

Observed Attention: +4%
Observed Excitement: +1%
Unaided Recall: -9%
Finding #05

Ad clutter appears to undermine the ad effectiveness of TV

Unaided Recall & Ad Clutter by Screen

Unaided Recall

Connected TV: 38%  
Mobile: 35%  
Linear TV: 27%  
PC: 43%

Percent Ad Time

Connected TV: 8%  
Mobile: 9%  
Linear TV: 27%  
PC: 12%

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)

Linear TV n=64; PC n=63; Mobile n=71; CTV n=43
Finding #06
As expected, creative quality is a strong driver of ad recall

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

Unaided Recall & Ad Likeability by Advertiser

<table>
<thead>
<tr>
<th>Advertiser</th>
<th>Unaided Recall</th>
<th>Ad Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Auto</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Home Security</td>
<td>19%</td>
<td>36%</td>
</tr>
<tr>
<td>Technology</td>
<td>8%</td>
<td>27%</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>7%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Ad Likeability

“On a scale of 1-10, how much did you like the ad/you just saw?”

(scored as top 3 box)

Unaided Recall: Auto n=33; Home Security n=67; Retail n=47; Technology n=76; Mobile Phone n=61
Finding #07
Content must be engaging to attract and hold attention

Survey Metrics by Content Type (△ from Average)

Observed Attention

- News: -1%
- Hip Hop: +2%
- iFood: +5%
- SyFy: -6%

Reported Engagement

- News: 0%
- Hip Hop: 0%
- iFood: 4%
- SyFy: -5%

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

<table>
<thead>
<tr>
<th>Location by Screen</th>
<th>Mobile</th>
<th>PC</th>
<th>Connected TV</th>
<th>Linear TV</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home, on the couch</td>
<td>33</td>
<td>26</td>
<td>24</td>
<td>35</td>
<td>118</td>
</tr>
<tr>
<td>Home, in bed</td>
<td>23</td>
<td>19</td>
<td>12</td>
<td>18</td>
<td>72</td>
</tr>
<tr>
<td>Home, sitting at a desk or table</td>
<td>14</td>
<td>18</td>
<td>7</td>
<td>9</td>
<td>48</td>
</tr>
<tr>
<td>Home, while doing an activity</td>
<td>11</td>
<td>9</td>
<td>11</td>
<td>12</td>
<td>43</td>
</tr>
<tr>
<td>Office</td>
<td>4</td>
<td>3</td>
<td>7</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Other, Neither Home nor Work</td>
<td>6</td>
<td>9</td>
<td>3</td>
<td>4</td>
<td>22</td>
</tr>
</tbody>
</table>

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.

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### Reported Attention by Location/Screen

(10 = Max)

<table>
<thead>
<tr>
<th>How much attention do you give when you watch x in y location?</th>
<th>Mobile</th>
<th>PC</th>
<th>Connected TV</th>
<th>Linear TV</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home, on the couch</td>
<td>6.2</td>
<td>7.3</td>
<td>6.1</td>
<td>6.3</td>
<td>6.4</td>
</tr>
<tr>
<td>Home, in bed</td>
<td>6.6</td>
<td>7.4</td>
<td>5.7</td>
<td>7.4</td>
<td>6.8</td>
</tr>
<tr>
<td>Home, sitting at a desk or table</td>
<td>5.8</td>
<td>7.1</td>
<td>7.9</td>
<td>6.8</td>
<td>6.8</td>
</tr>
<tr>
<td>Home, while doing an activity</td>
<td>5.0</td>
<td>6.1</td>
<td>5.0</td>
<td>4.4</td>
<td>5.1</td>
</tr>
<tr>
<td>Office</td>
<td>5.5</td>
<td>6.7</td>
<td>6.0</td>
<td>6.0</td>
<td></td>
</tr>
<tr>
<td>Other, Neither Home nor Work</td>
<td>5.5</td>
<td>6.7</td>
<td>6.0</td>
<td>6.0</td>
<td></td>
</tr>
</tbody>
</table>

n=

<table>
<thead>
<tr>
<th>Mobile</th>
<th>PC</th>
<th>Connected TV</th>
<th>Linear TV</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>91</td>
<td>84</td>
<td>57</td>
<td>78</td>
<td></td>
</tr>
</tbody>
</table>
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!