

Track the Success

Study on perception and reactions to
moving image platforms

Agenda

- 01** Background and method
- 02** Advertising impact
- 03** Perception
- 04** Reaction
- 05** Special analysis devices
- 06** Special analysis second screen
- 07** Special analysis age groups

01

Background & methods

The continuation of the basic study

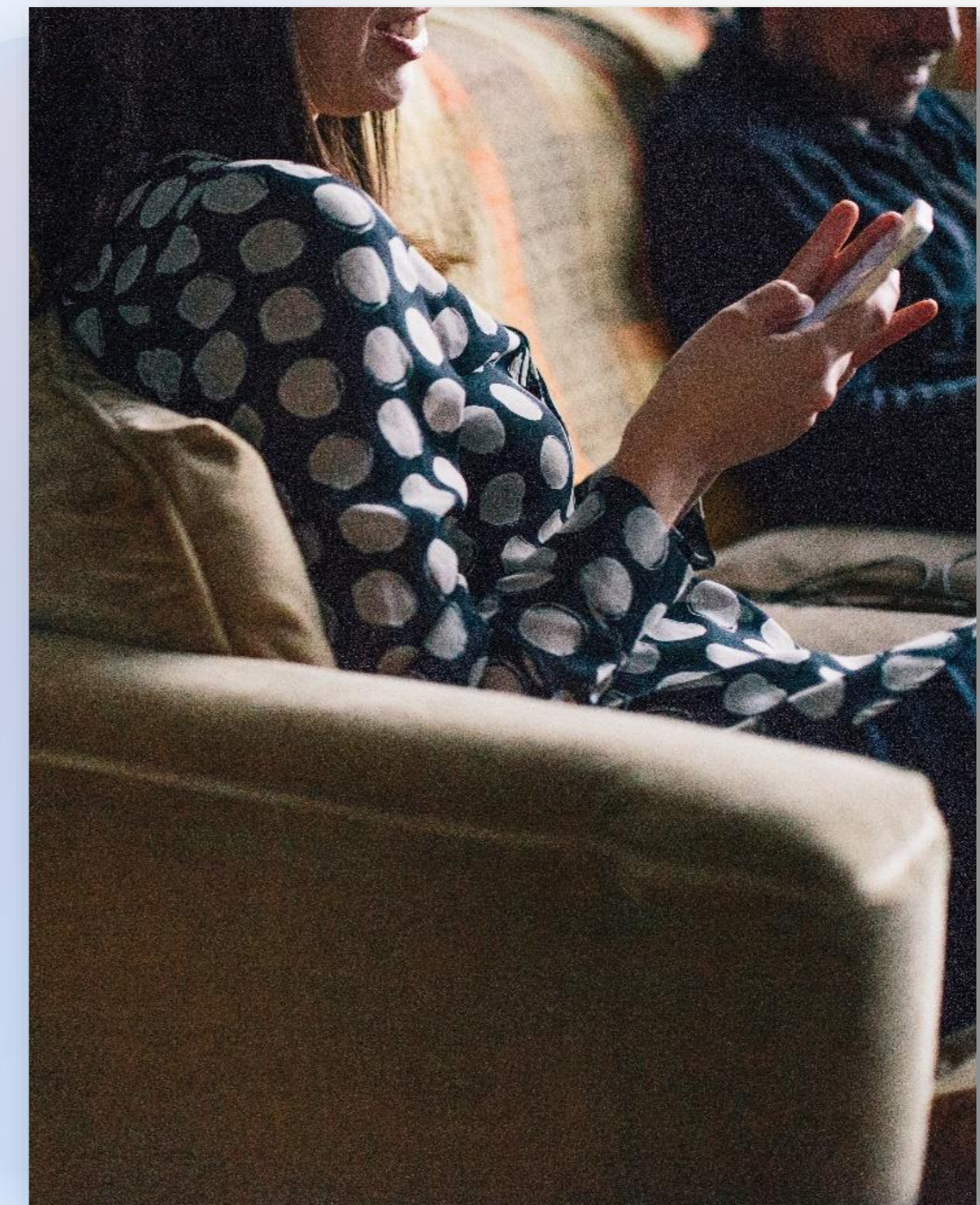
Eye square takes the „Not all reach is equal“ study to the next level

In the foreground:

- The reception situation (perception and reaction) during media consumption
- Advertising impact on various channels

Additional influencing factors:

- Devices used
- Usage of a second screen
- The effect of age



549 In-Home media ethnographies

The sample was composed of:

- Gesamt N = 549
- 52% male, 48% female
- 51% 18-39 years old, 49% 40+ years old

- 79% from DE (N = 434)
- 11% from AT (N = 58)
- 10% from CH (N = 57)

Test locations:

Berlin, Hamburg, Frankfurt a.M., München as well as Wien and Zürich



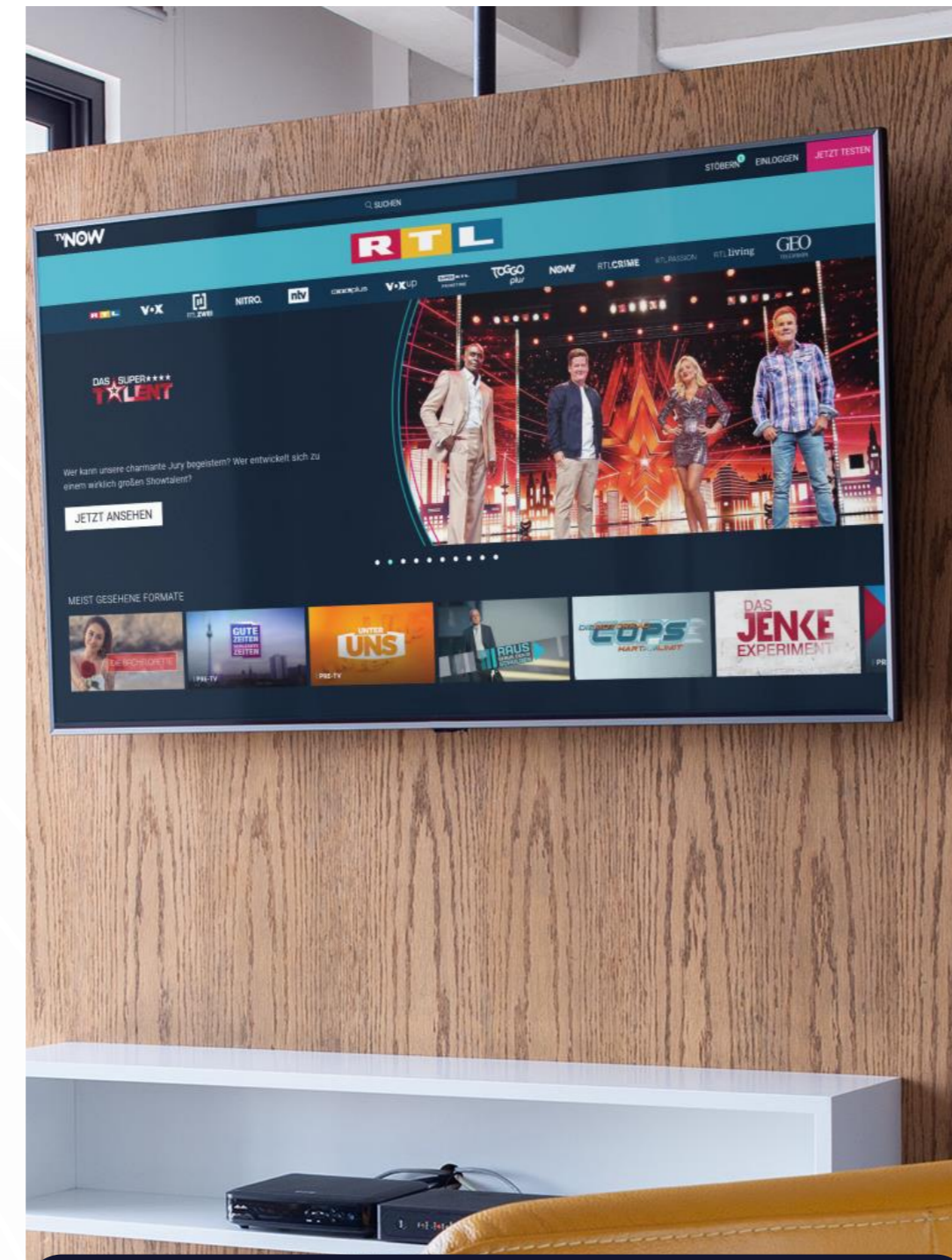
The largest media ethnography in the DACH region



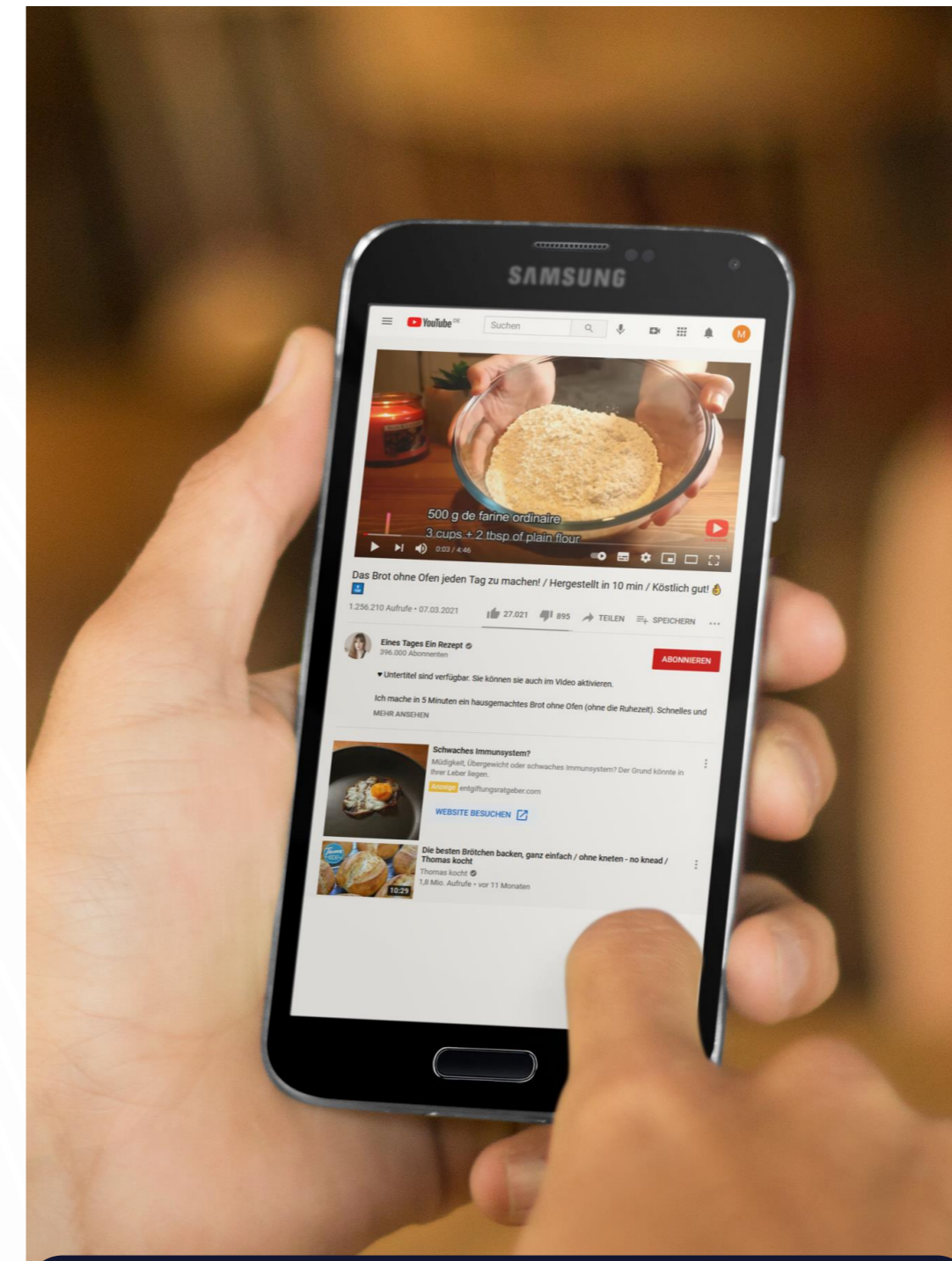
Media platforms used



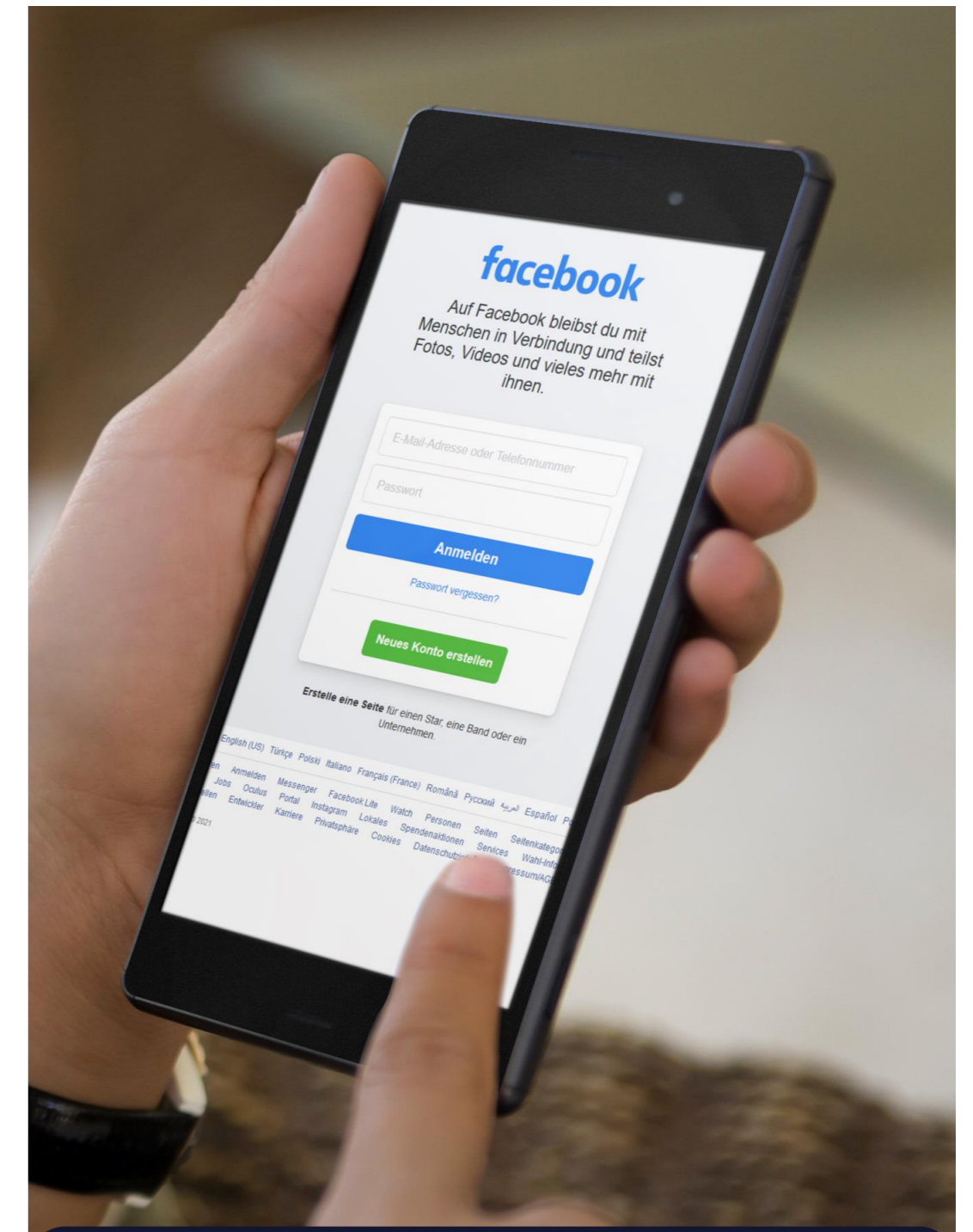
TV



BYOD



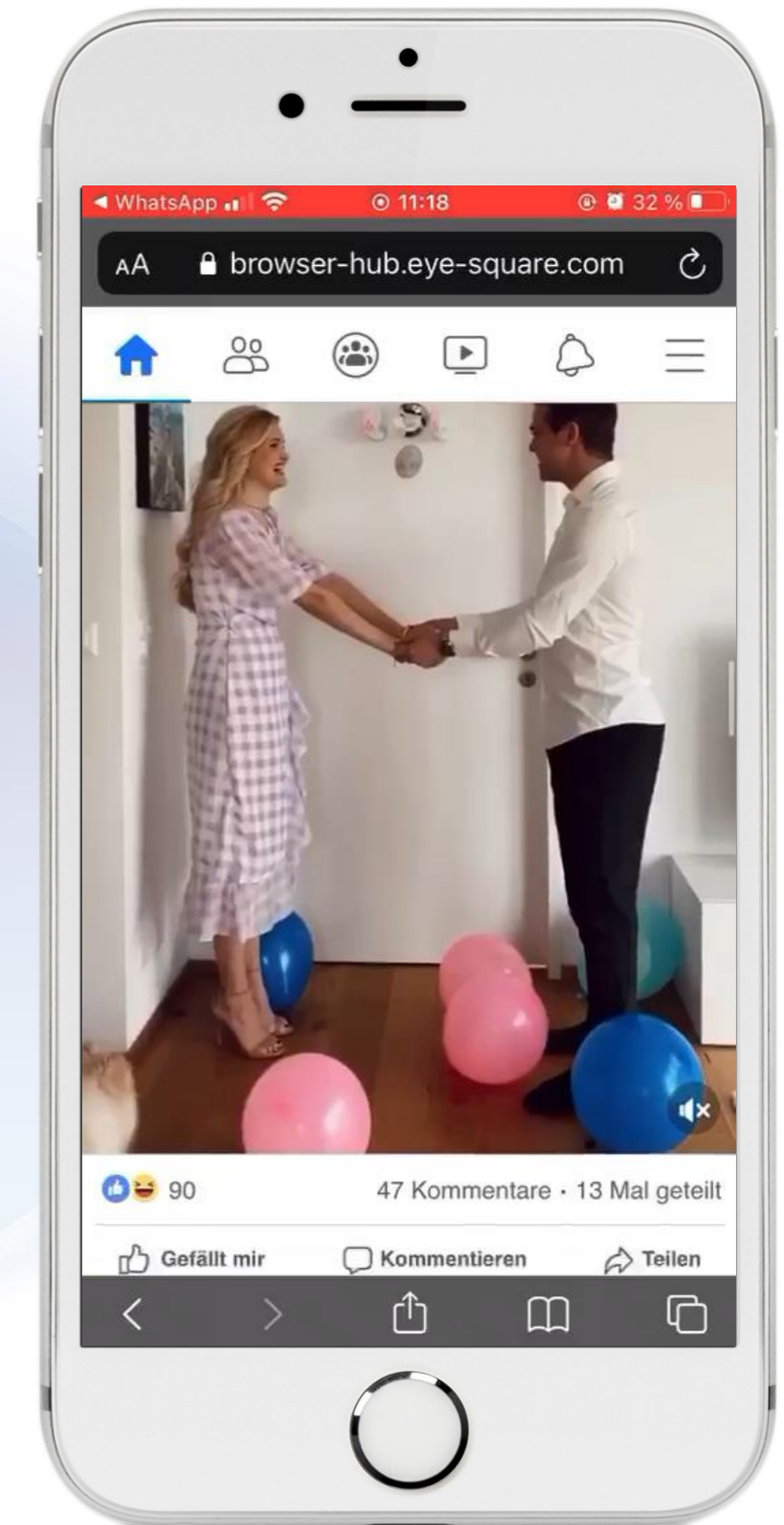
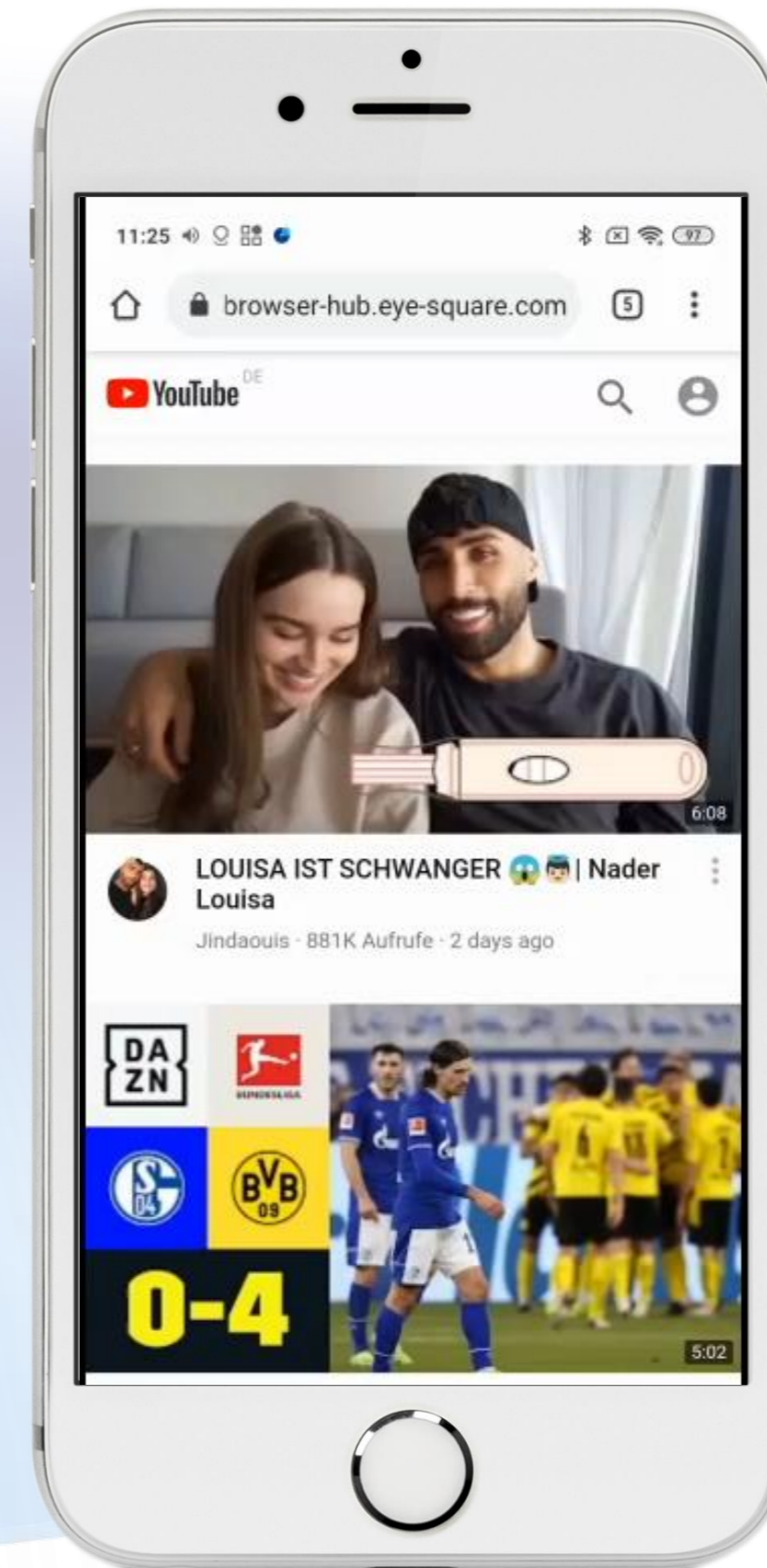
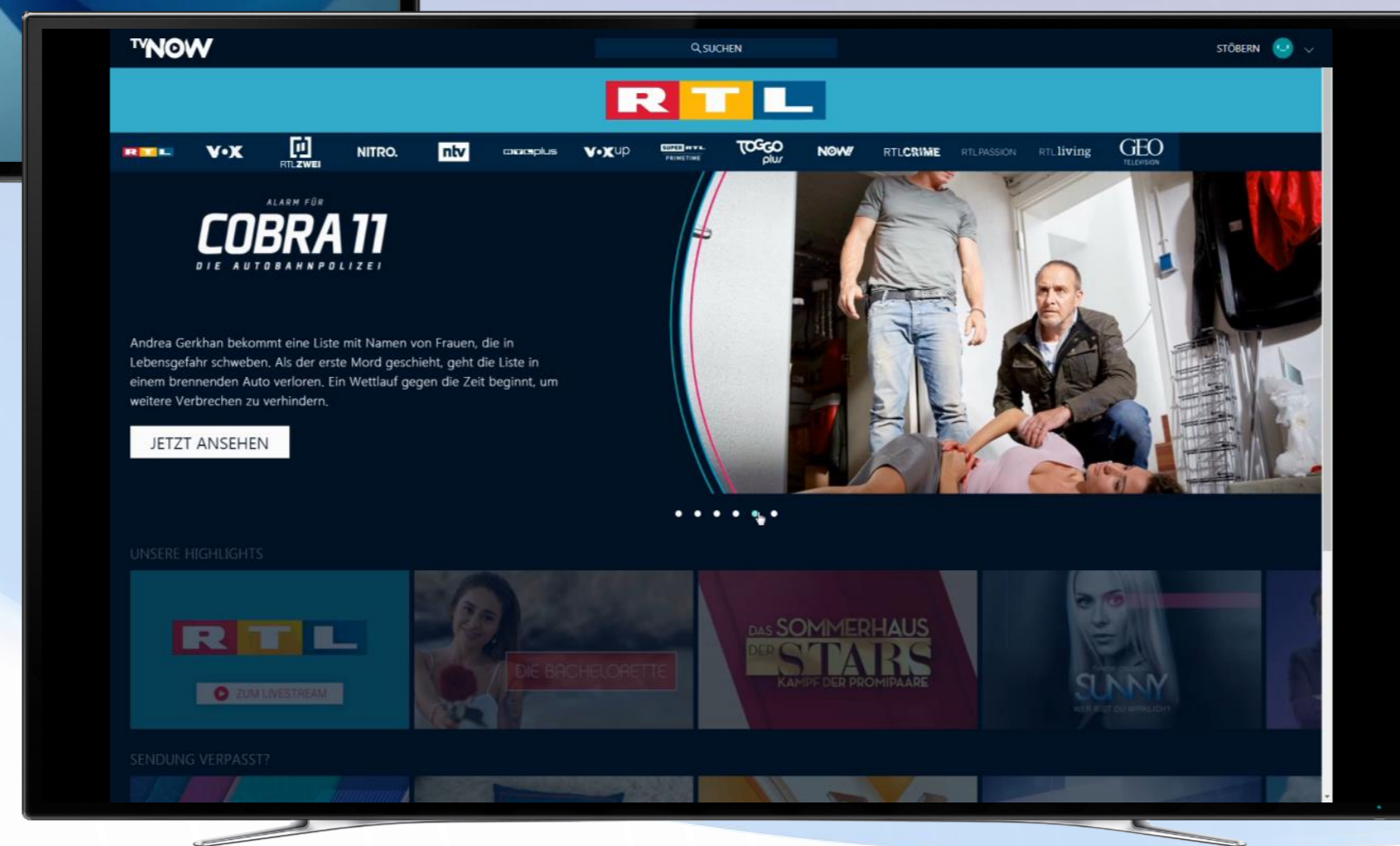
YouTube



Facebook

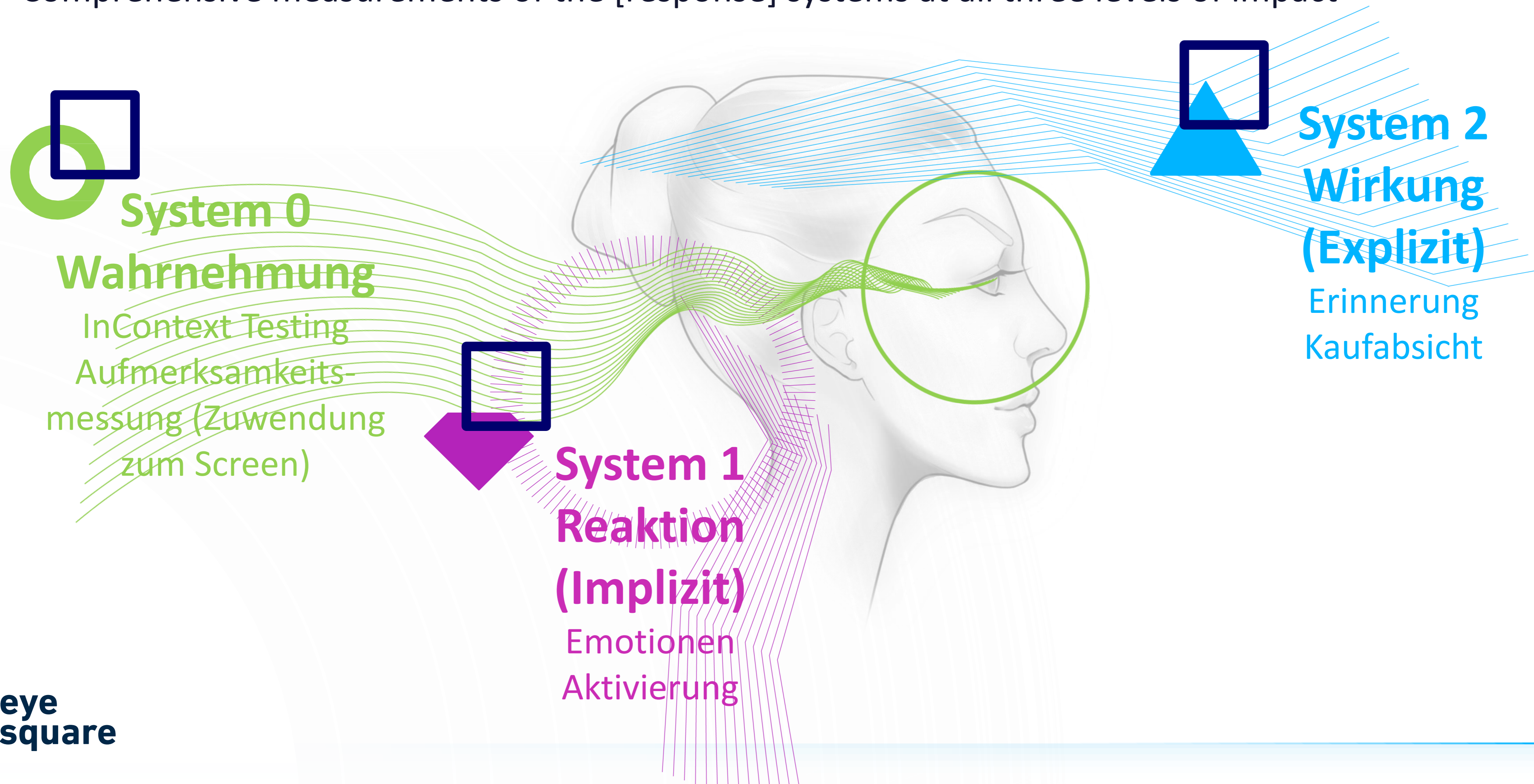
InContext: Ad replacements in detail

Realistic embedding of advertising into different platforms



Human Experience Testing

Comprehensive measurements of the [response] systems at all three levels of impact



Advertising impact model

From advertising contact to individual response to final effect

Perception

System
0

Reaction

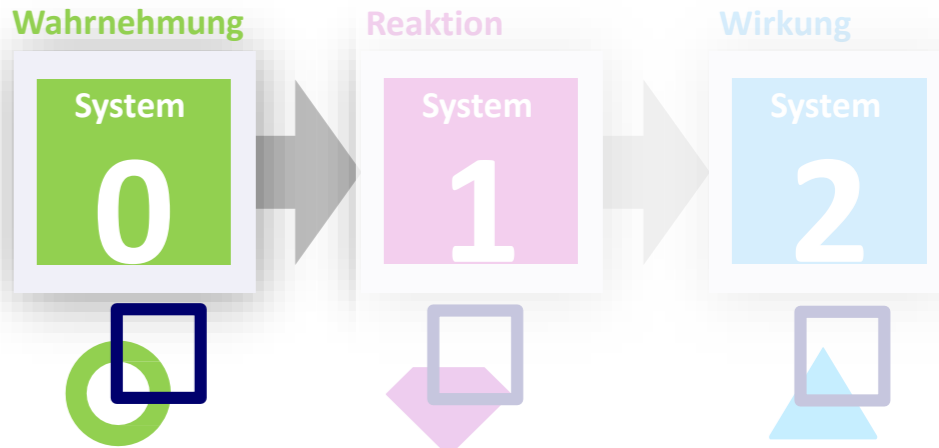
System
1

Effect

System
2

Advertising in the context of media

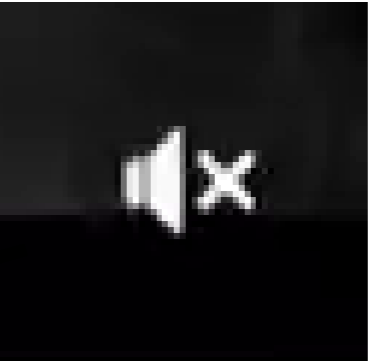
Gain detailed insights into the media experience via the setting



Screencover

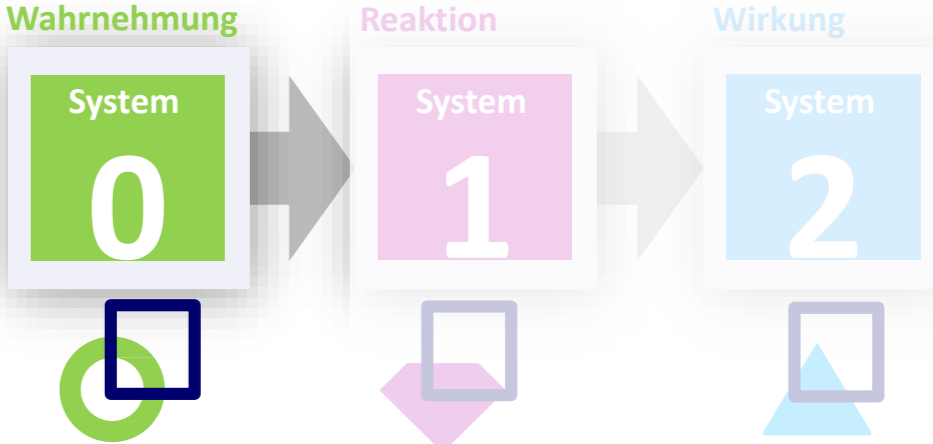
Play duration

Scrolling behavior



Attention to the screen

Comprehend the visual attention of the viewers



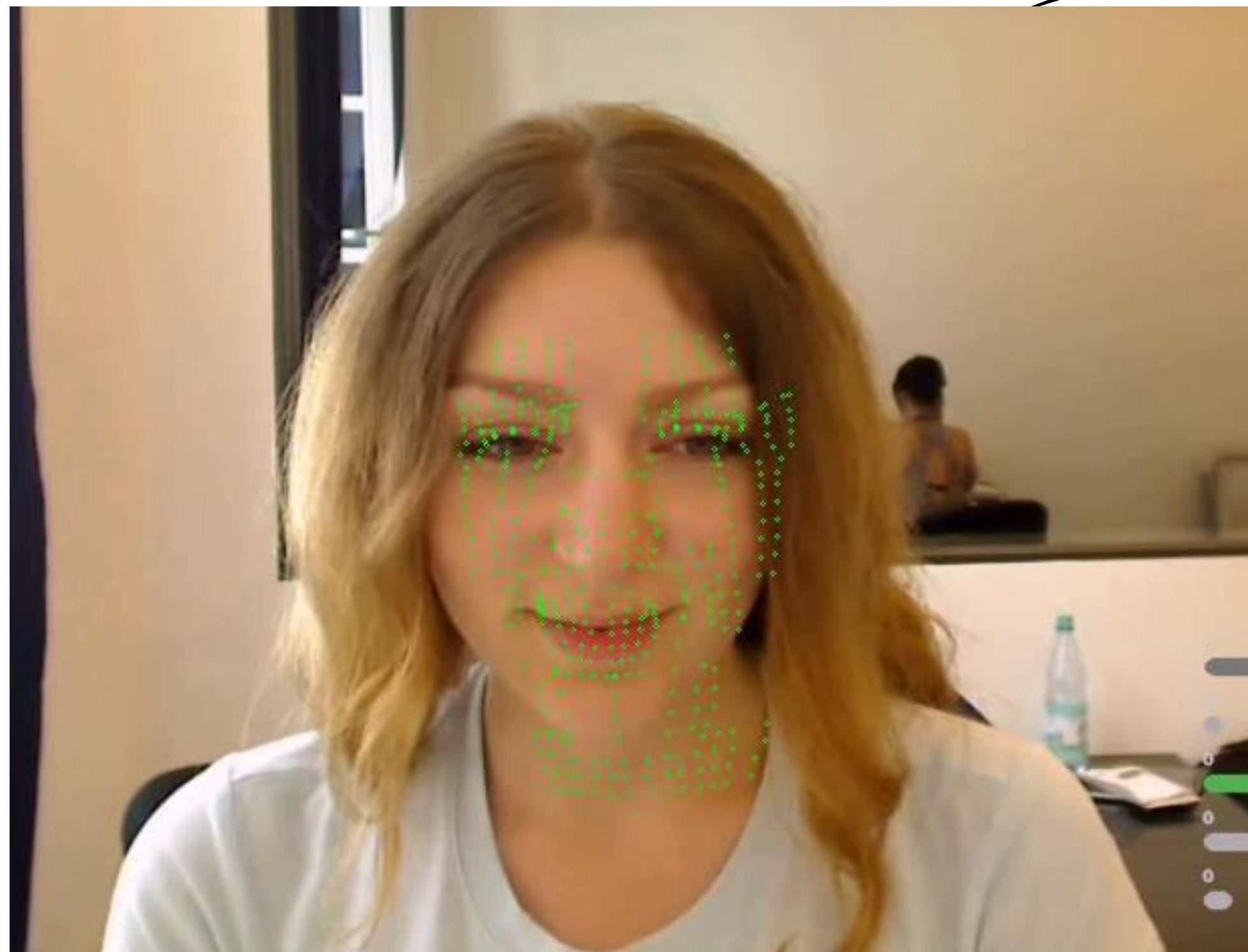
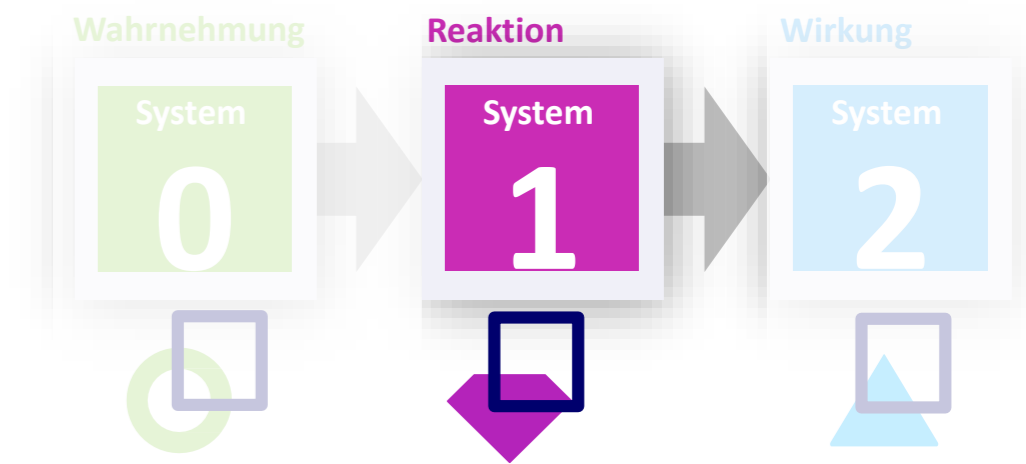
Facial recording through a normal webcam



AI analyzes head rotations and indicates when attention was given to the screen

Reliably recognize emotions

Facial expressions provide insights into the emotionalization of the (ad) spots



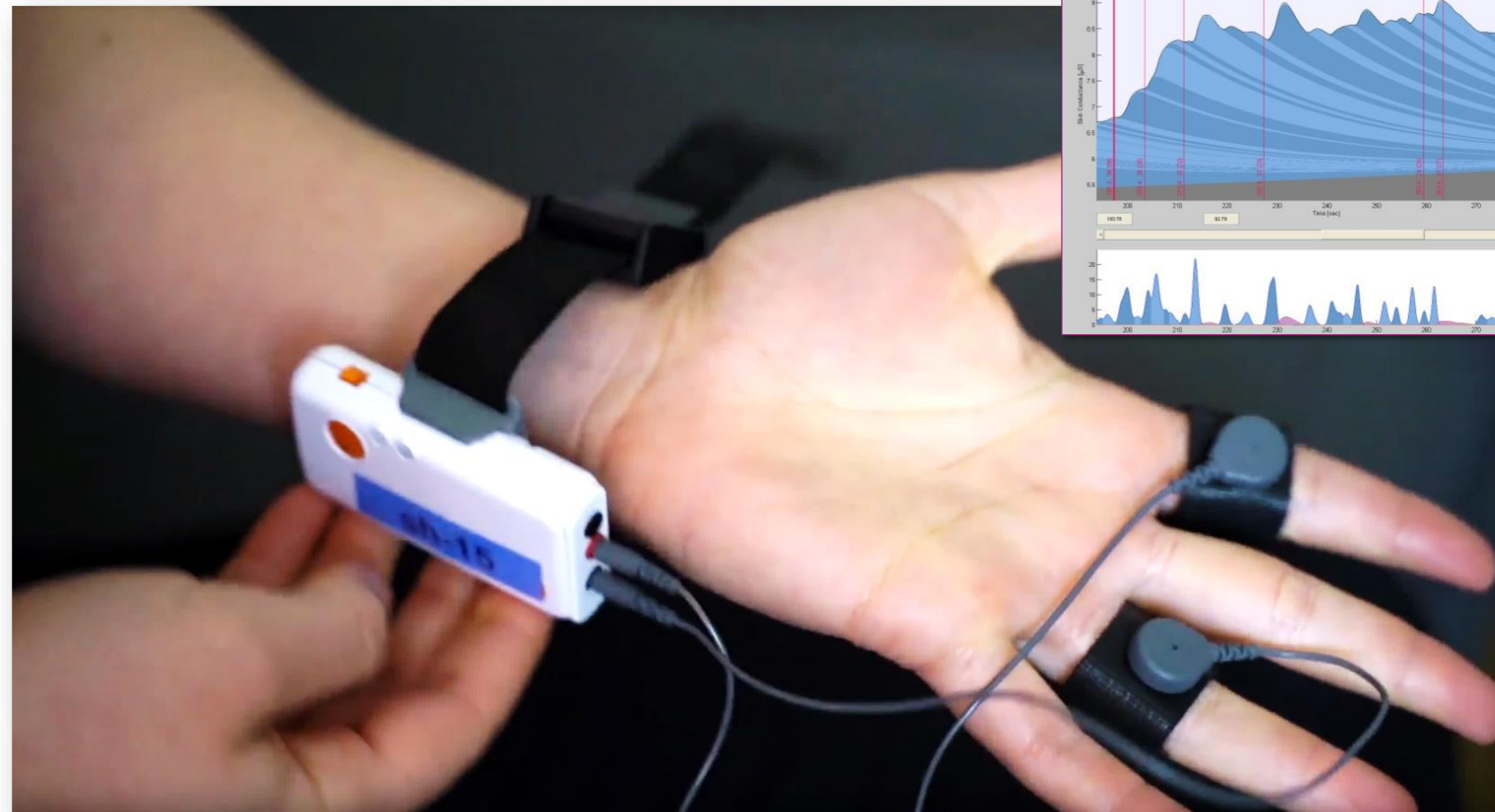
Emotion	Percentage
Neutral	0%
Happy	42%
Surprised	0%
Angry	18%
Disgusted	14%
Afraid	6%
Sad	17%

Relaxation and excitement

Detect reactions by measuring skin conductance

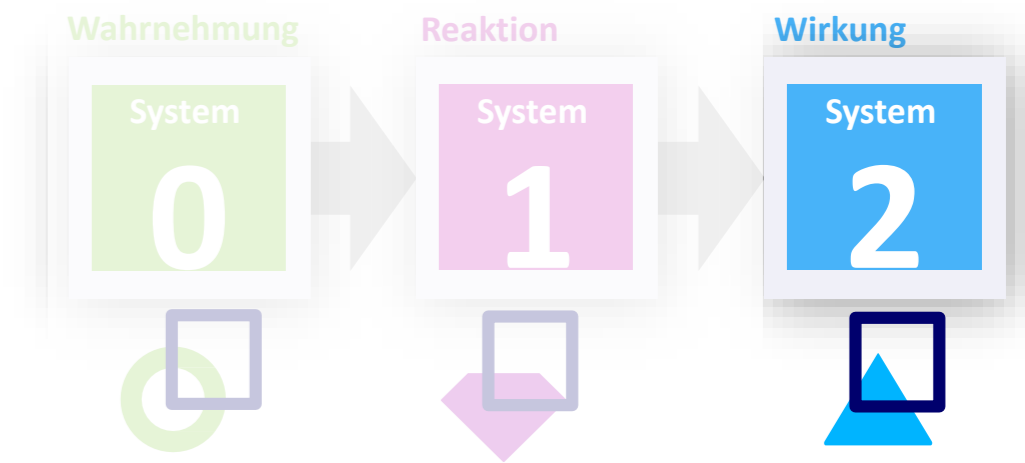


- In which state of mind is a viewer?
- How ,activating' is the event



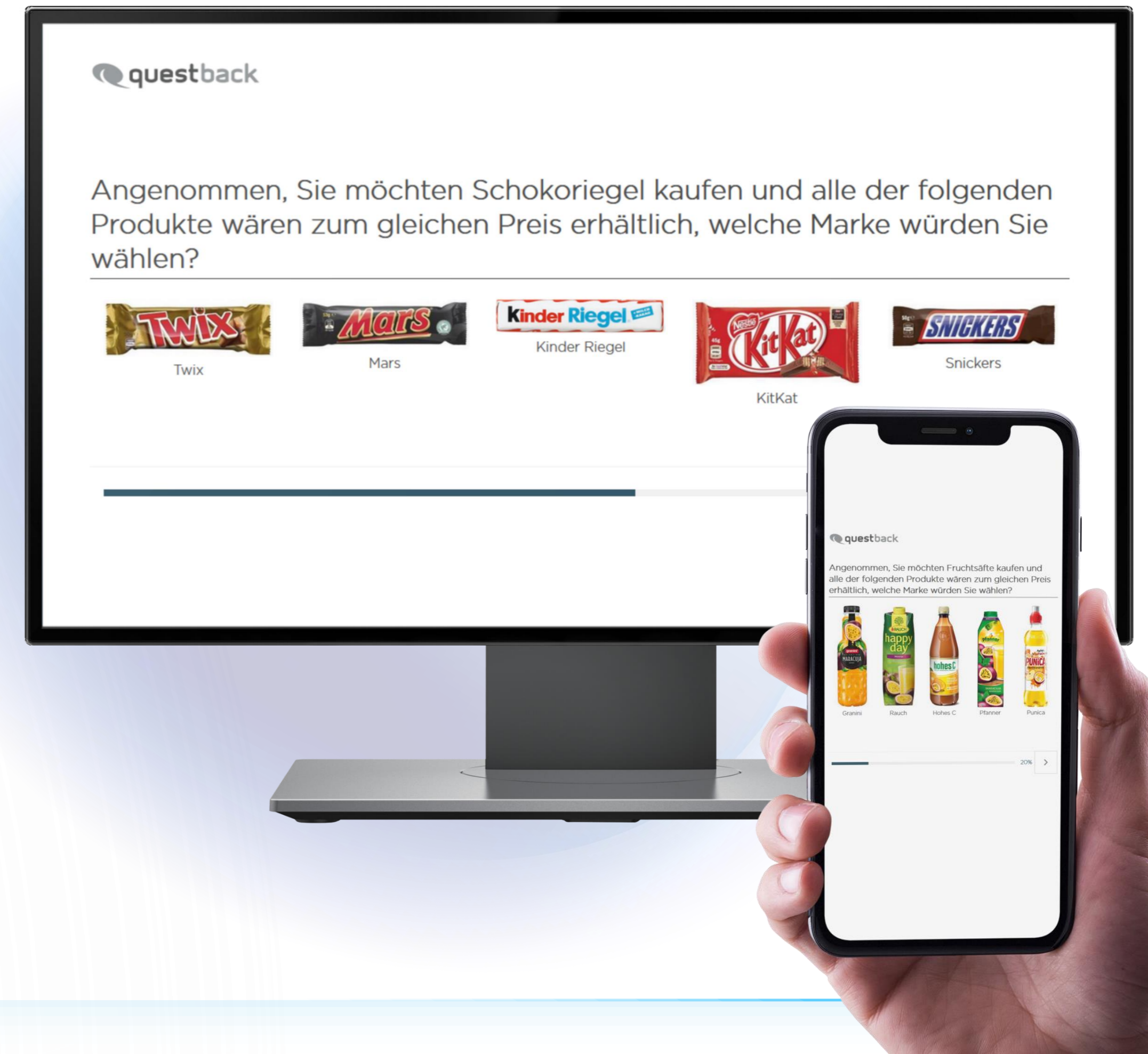
Advertising impact

A combination of classic and innovative survey methods



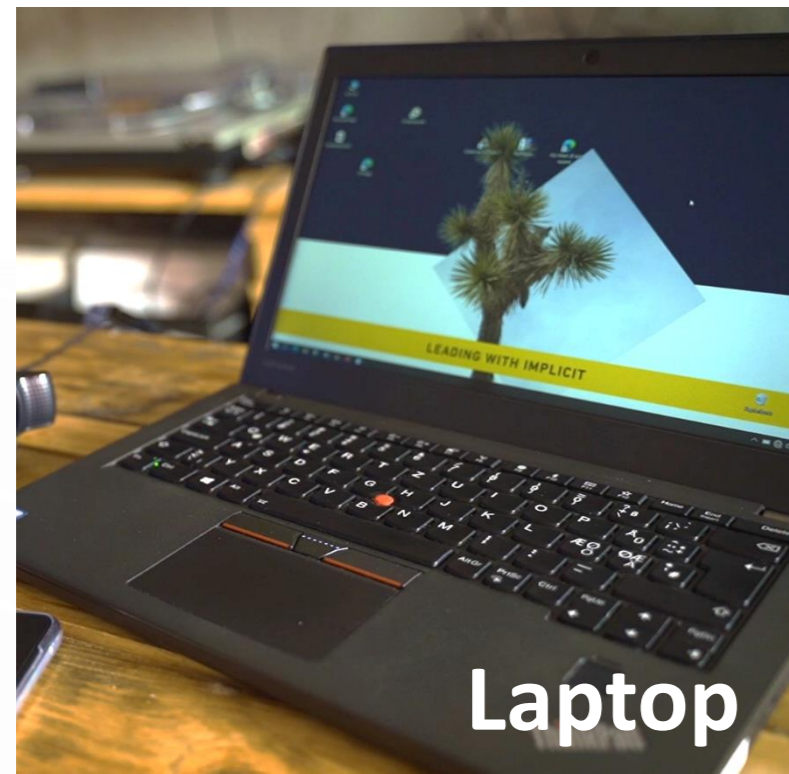
Online questionnaire:

- Advertising recall
- Open question about spot details
- Purchase intention
- Apps used during second-screen use
- Evaluation of media environments



Home-Kit Technology

All equipment can be self-assembled by the participants

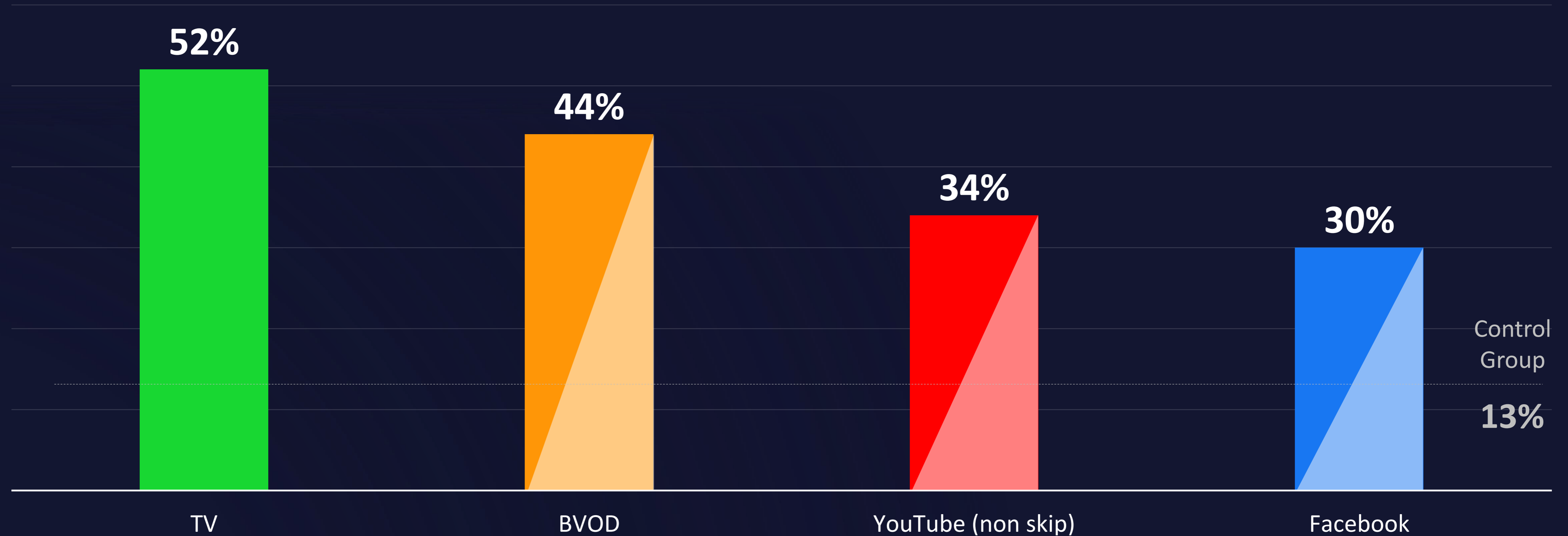


02

Advertising impact

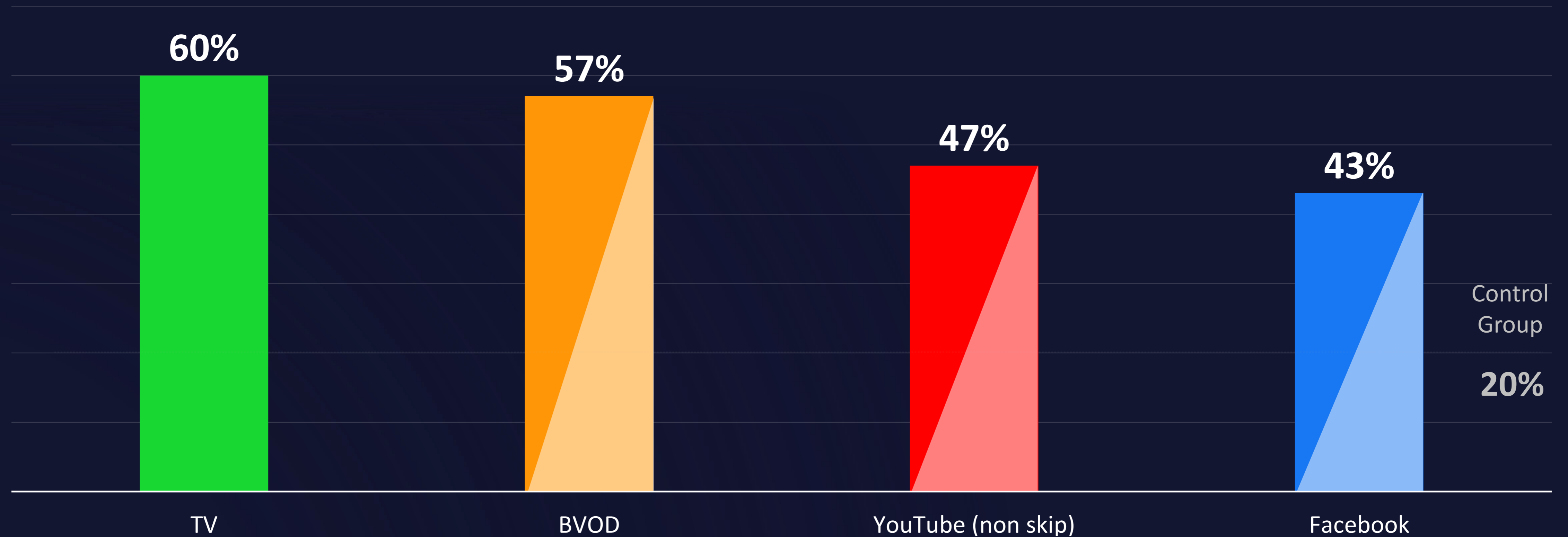
TV ads are best remembered spontaneously

Free recall of the ads



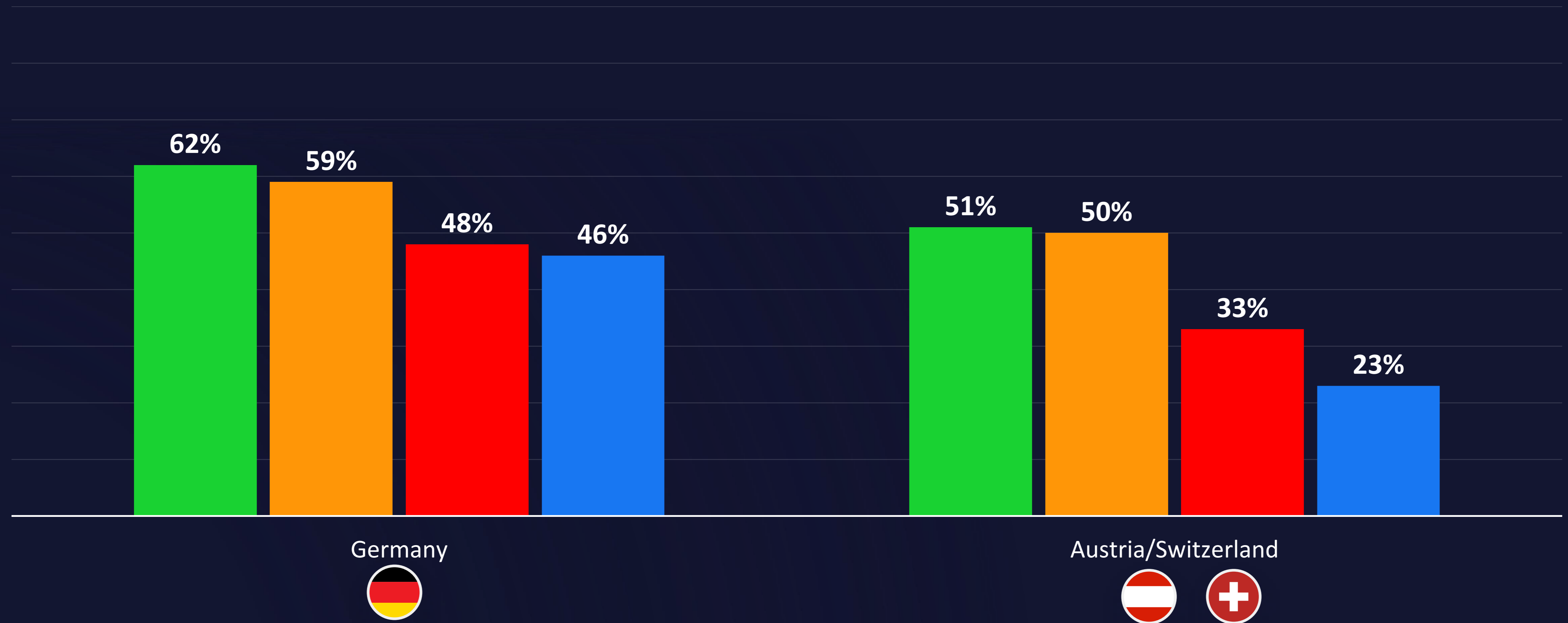
TV in the lead even with aided recall

Aided recall



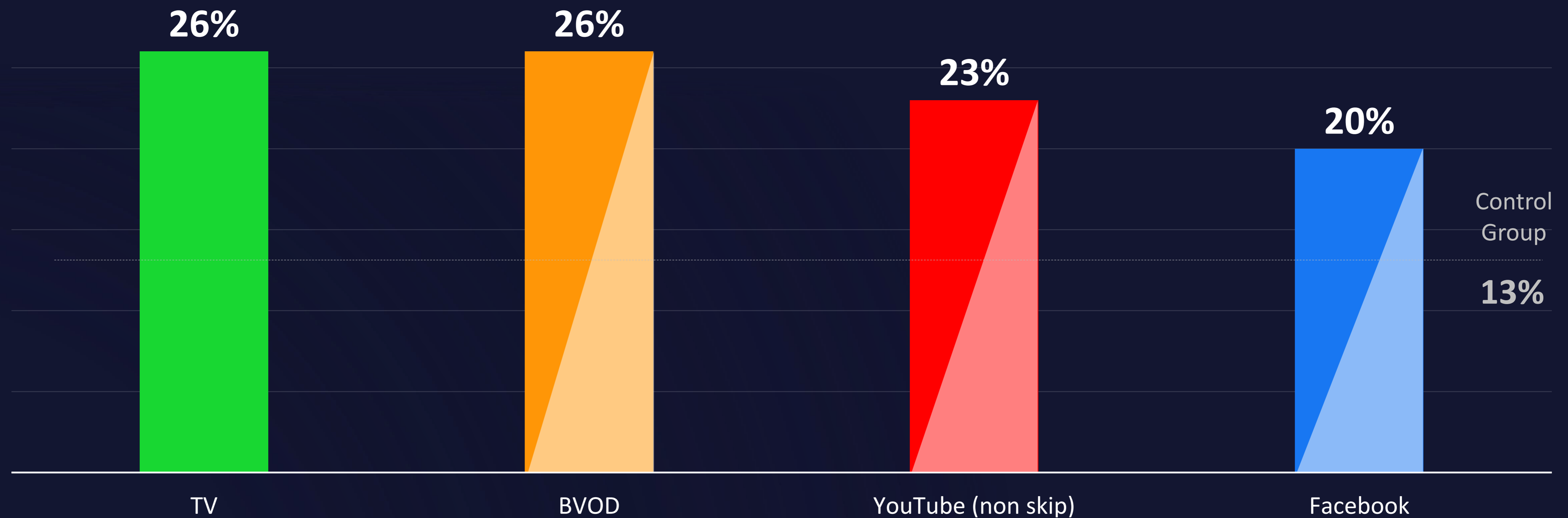
Trends are uniform across all countries

Example: aided recall of ads in Germany, Austria, and Switzerland



TV & BVOD are even when it comes to purchase intentions

Purchase Intention

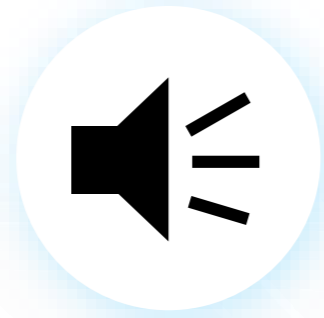
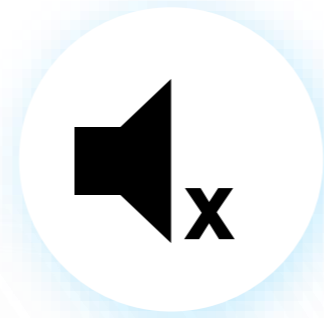
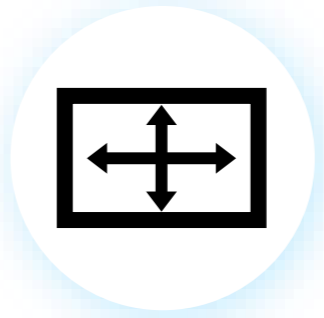
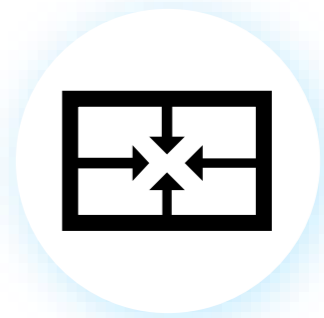


03

Perception

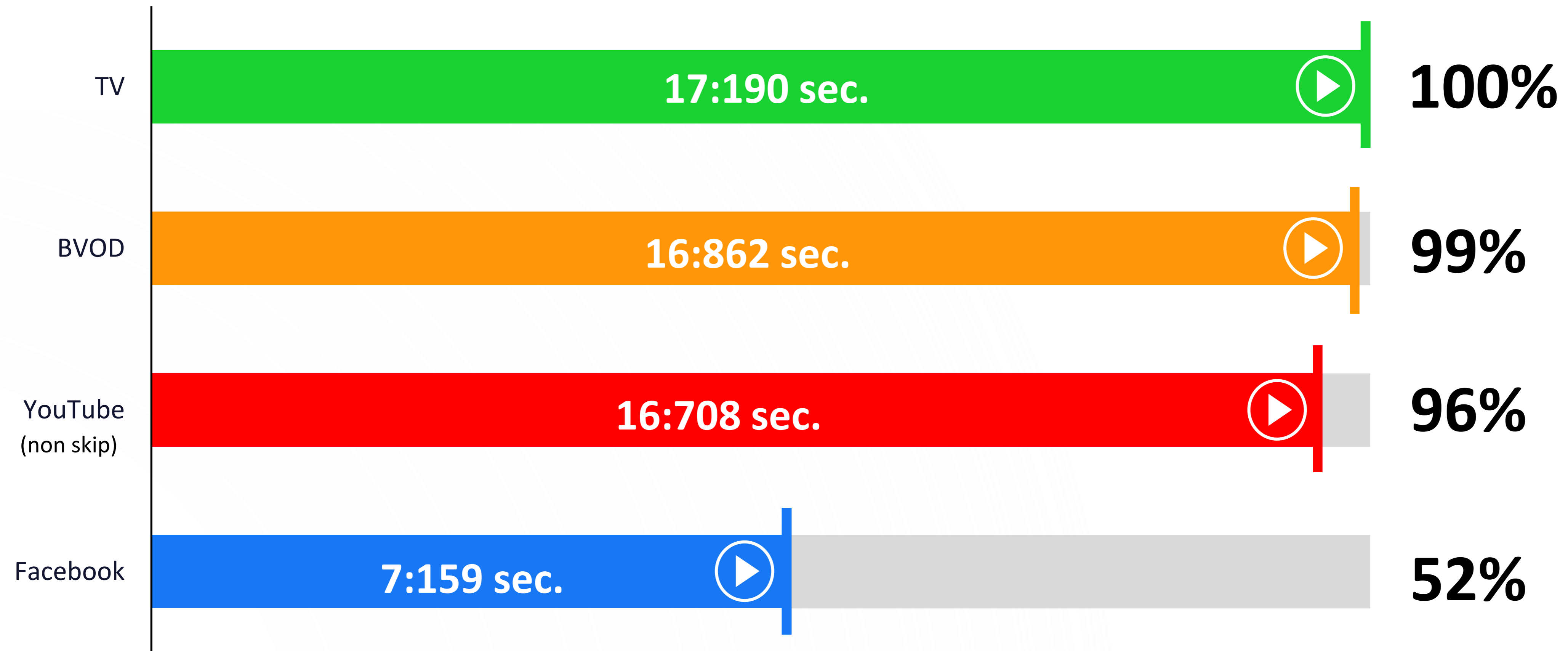
Ads on Facebook are mostly muted

Proportion of ad contacts that were played back with sound and in full screen

	 Sound on	 Muted	 Fullscreen	 Not Fullscreen
TV	100%	0%	100%	0%
BVOD	100%	0%	100%	0%
YouTube (non skip)	100%	0%	59%	41%
Facebook	34%	66%	16%	84%

Ads on TV are always visible

Viewing duration of the ads in proportion to the average length of commercials



Sichtbarkeitsdauer: Sichtbarkeitsdauer der Werbekontakte in Sek. Anteil an der Länge der Werbespots (in %). N (TV) = 476, N (BVOD; TV und Smartphone) = 804, N (YouTube; TV und Smartphone) = 774, N (Facebook;) = 380. N = Anzahl der Werbekontakte.

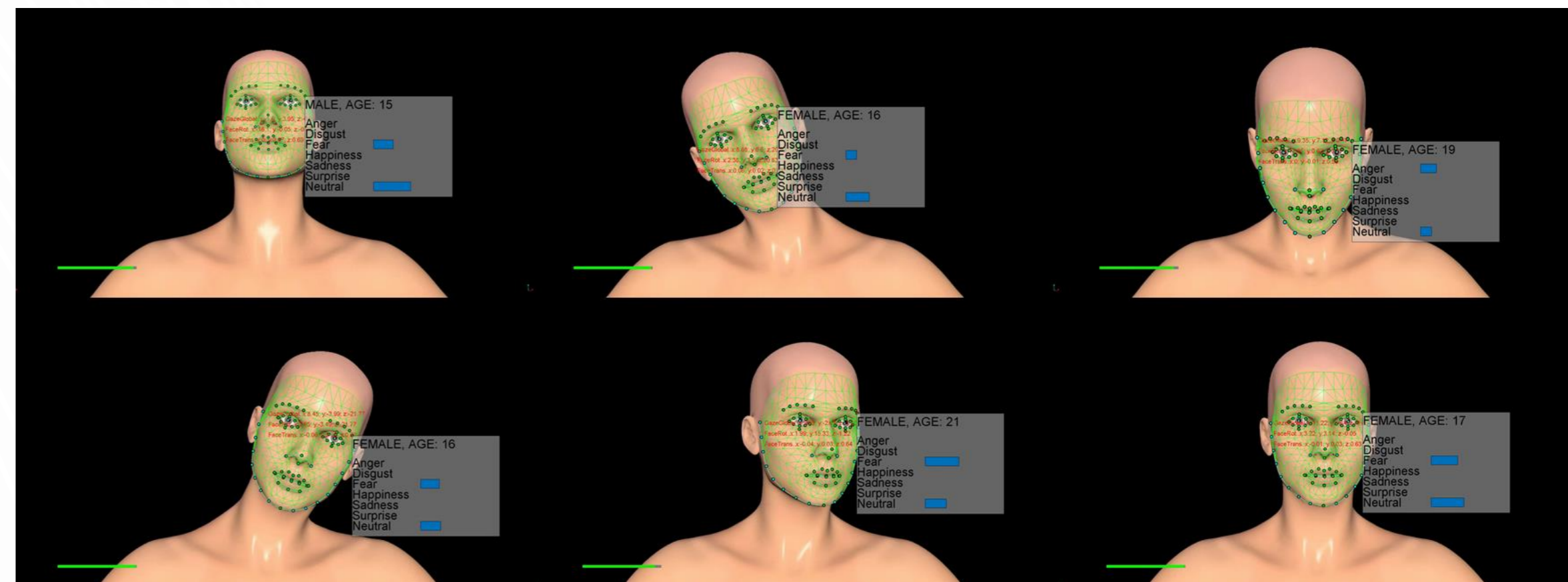
Attention to the screen

Inference of visual attention based on the viewers orientation towards the screen

An algorithm detects whether the subject's face is visible from the front when looking at the TV (camera 1) or smartphone (camera 2).

If this is the case, it's assumed that the tester is looking at the respective screen and this is interpreted as looking at the screen.

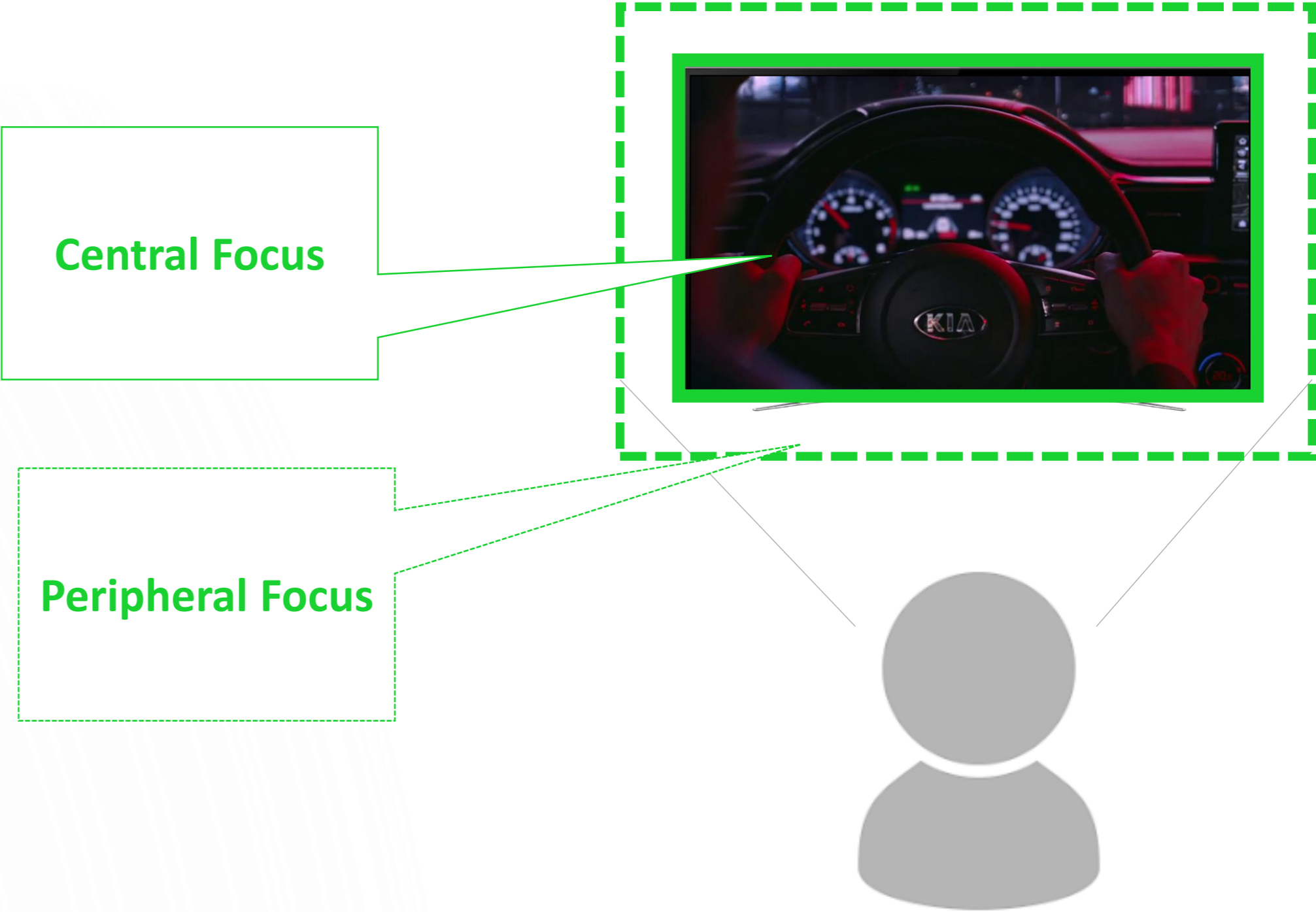
Analyse von Kopffrotation und frontaler Zuwendung für die Zuwendungsdetektion



Attention to the screen

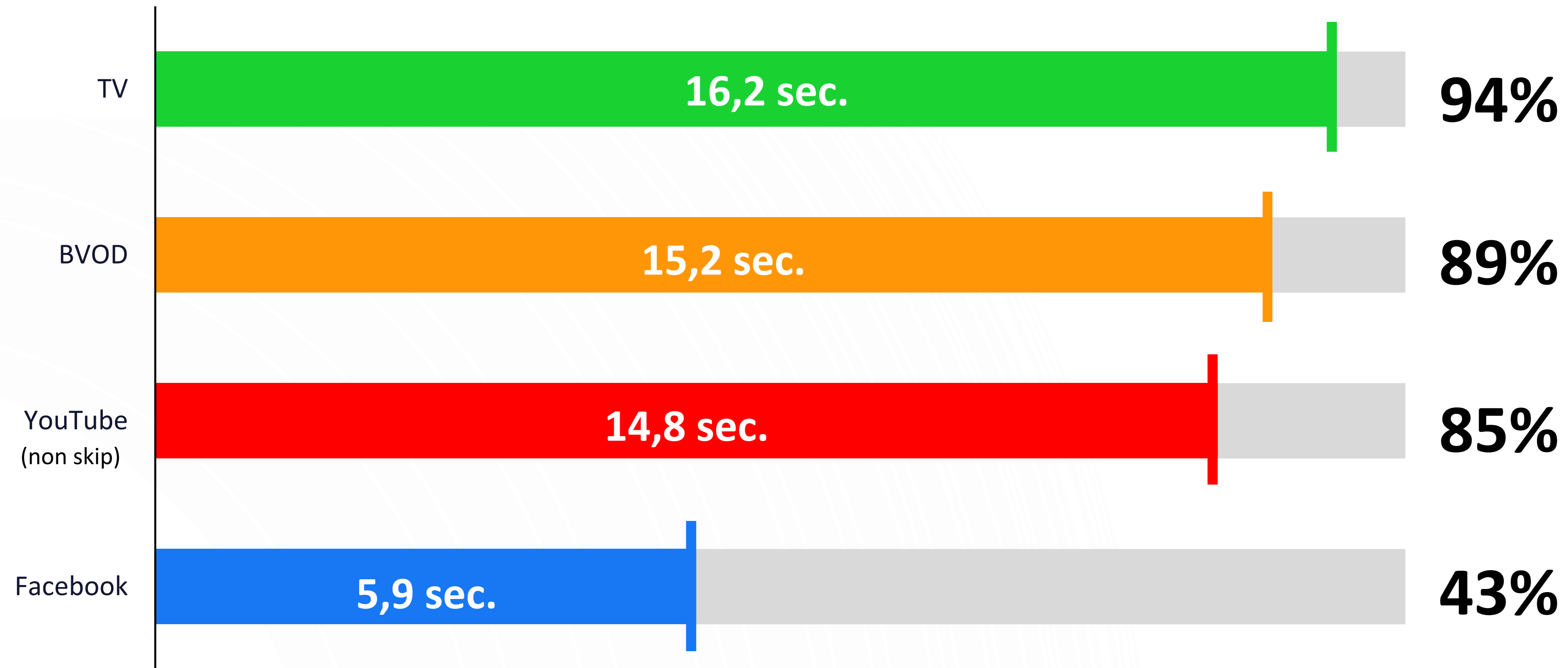
Inference of visual attention based on the viewers orientation towards the screen

Focus on the screen =
central + peripheral focus



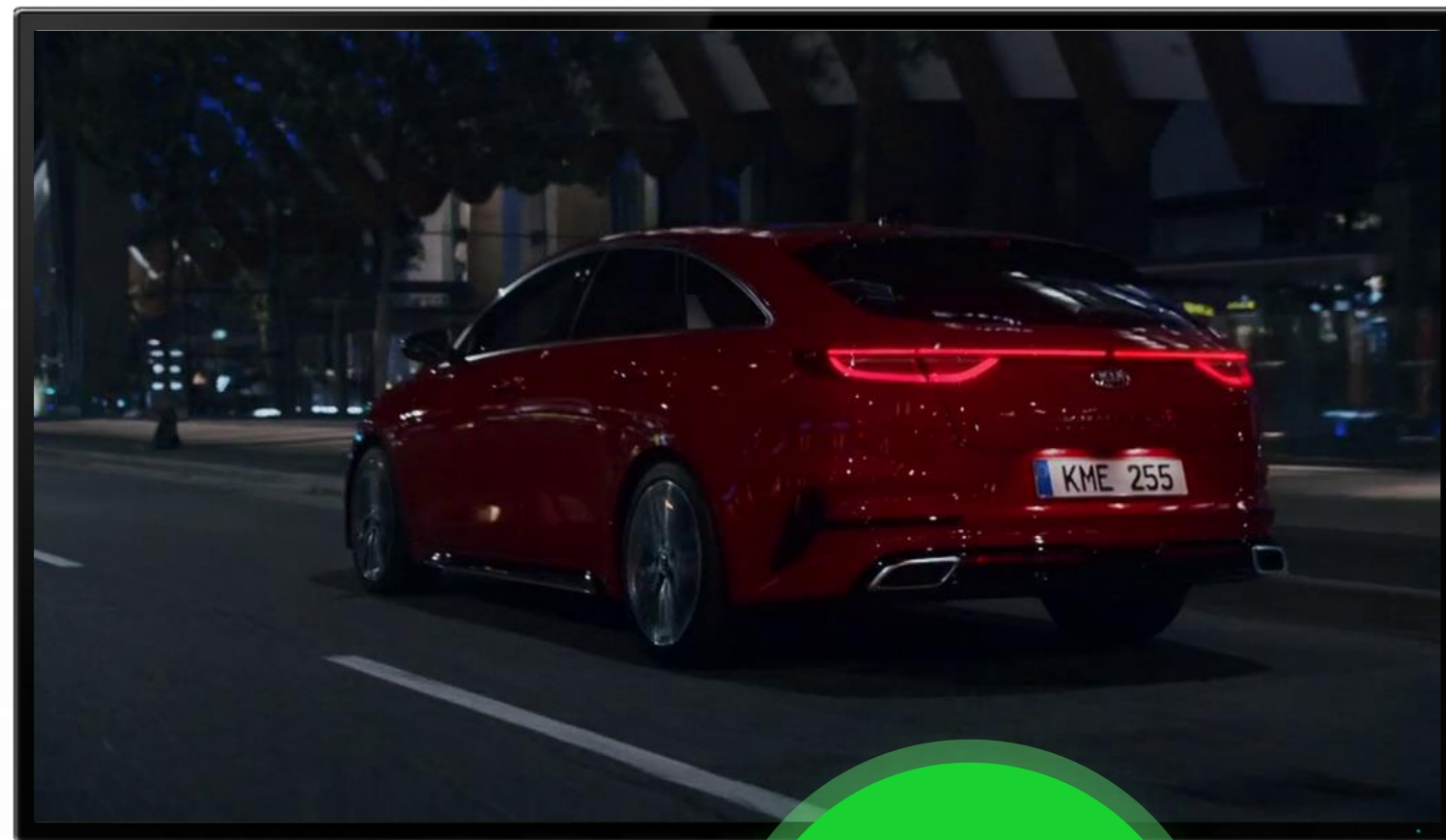
TV reaches the highest allocation of attention

Attention to the screen during advertising in seconds and proportion to the spot length

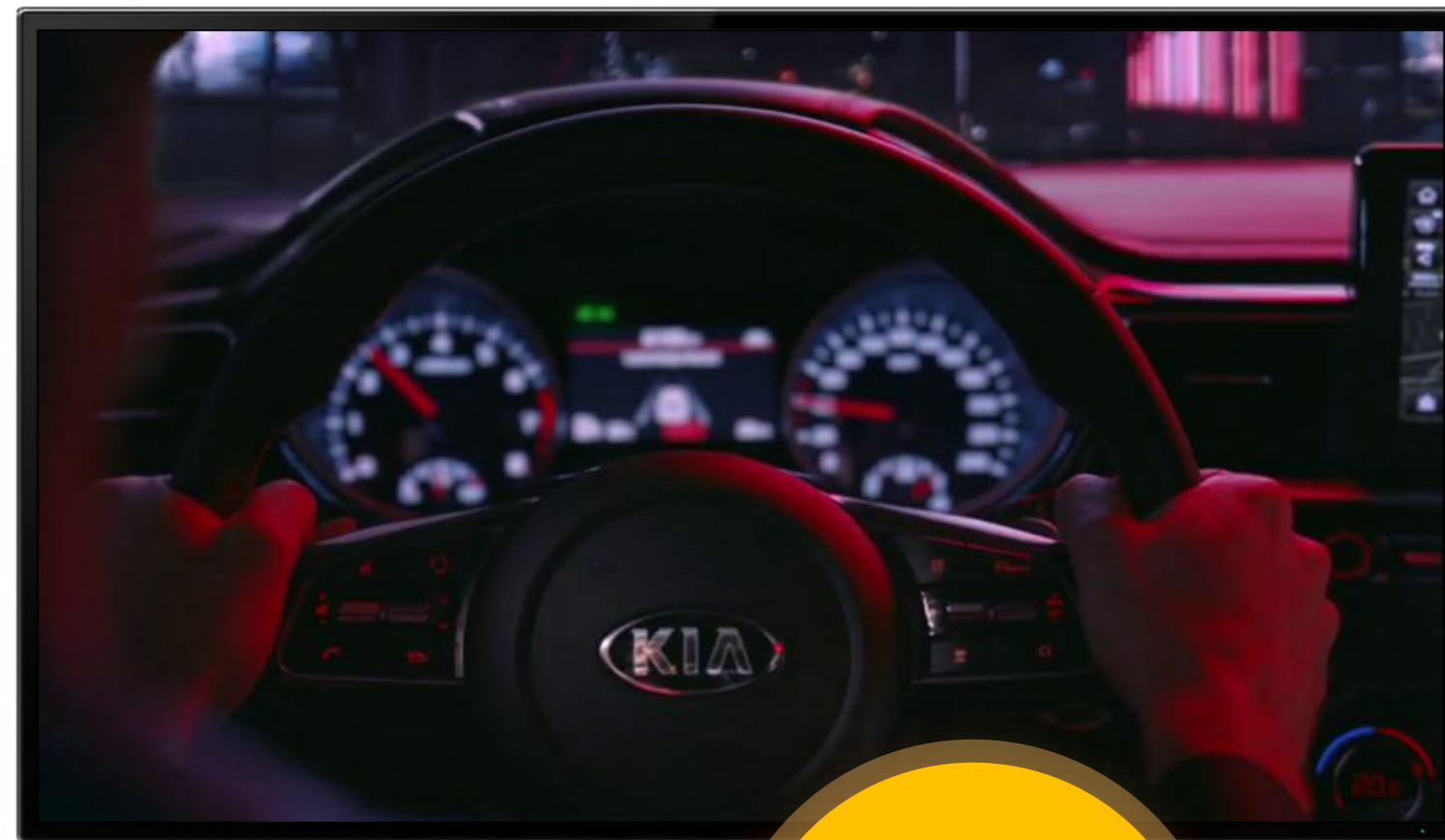


Screen coverage on TV sets

Coverage: Percentage of the total screen area represented by the advertising displayed



100%
TV



100%
BVOD



100%
YouTube

...but what does advertising look like on mobile devices?

Screen coverage on smartphones

Coverage: Percentage of the total screen area represented by the advertising displayed

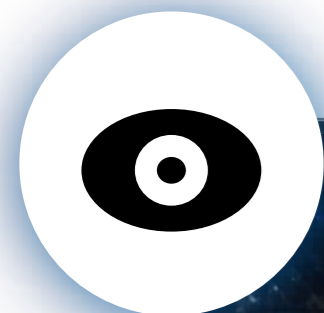


Perception chance of the ad on TV

Attention to the
screen

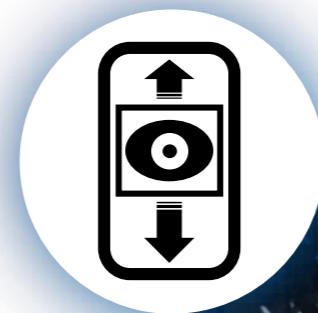
Screen coverage

Perception chance of
the ad



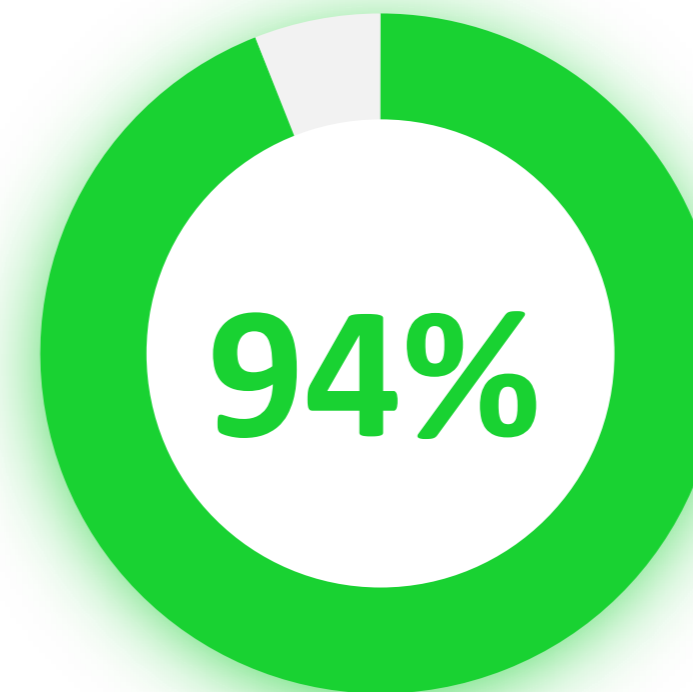
94%
TV

X



100%
TV

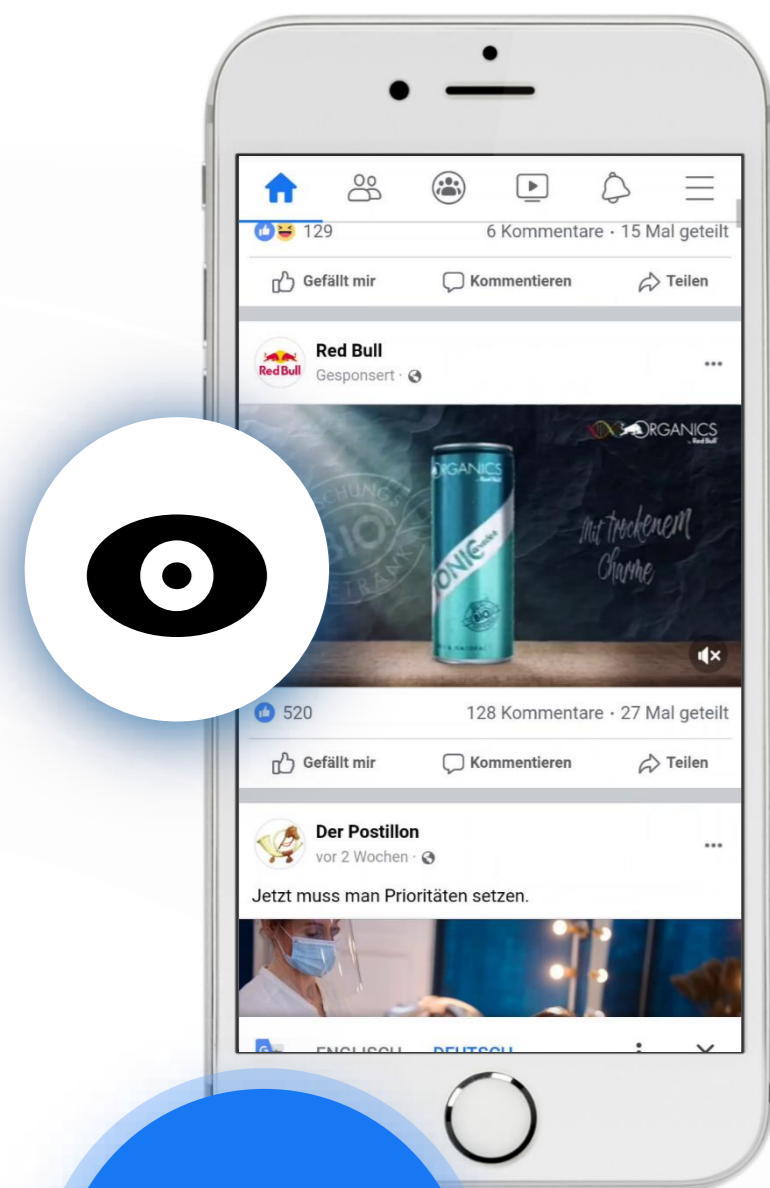
=



1. 94% of the spot length is devoted to the (entire) screen.
2. The ad covers 100% of the screen.
3. This results in a perception chance of 94% of the ad length.

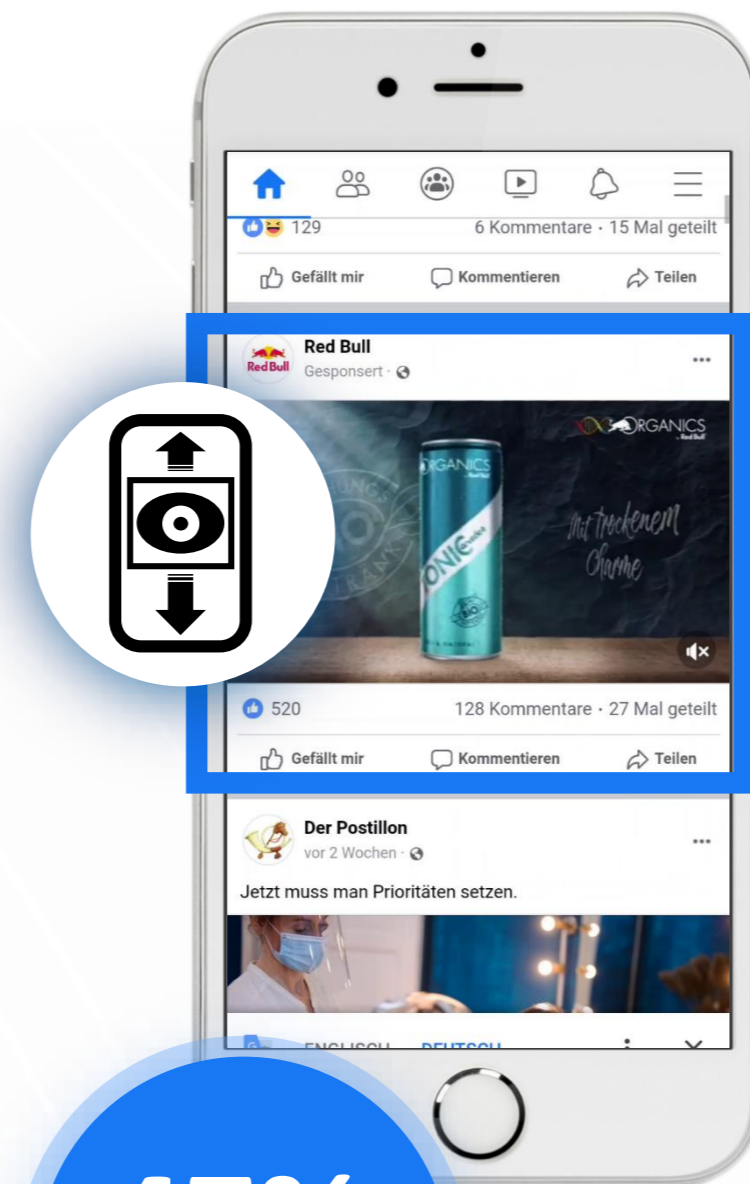
Perception chance of the ad on Facebook

Attention to the screen



43%
Facebook

Screen coverage

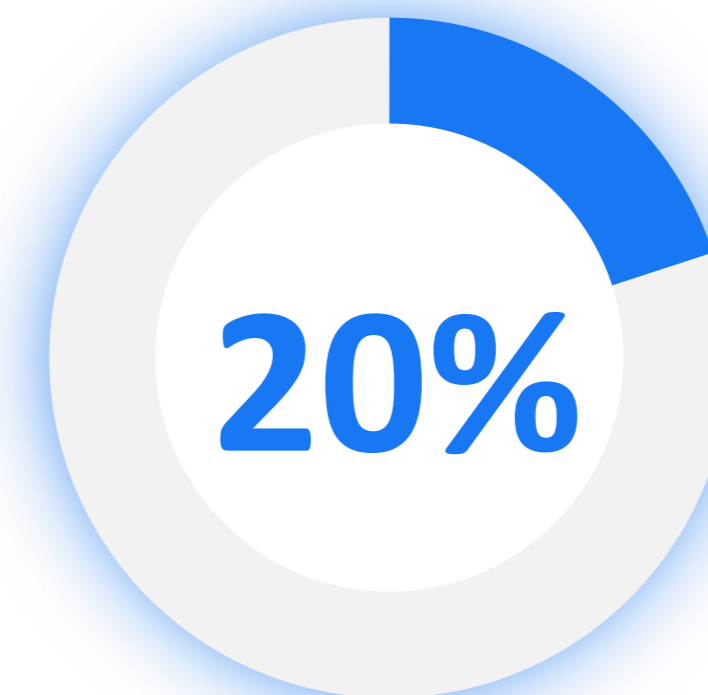


47%
Facebook

X

=

Perception chance of the ad



1. 43% of the spot length is devoted to the (entire) screen.
2. The ad covers 47% of the screen.
3. This results in a perception chance of 20% of the ad length.

Low awareness of Facebook ads

Perception chance: Allowance calculated against screen coverage



TV

16,2 sec.



BVOD

15,2 sec.



YouTube
(non skip)

10,3 sec.



Facebook

2,8 sec.

Wahrnehmungschance: Mittelwert der Zuwendung zum Screen während der Werbekontakte auf den Plattformen, sowie anteilig an der Durchschnittslänge der Werbespots, verrechnet mit der jeweiligen Bildschirmabdeckung des Werbekontaktes und der Darstellung im Fullscreen-Modus (in %). N (TV) = 476, N (BVOD; Mittelwert aus TV und Smartphone) = 804, N (YouTube; Mittelwert aus TV und Smartphone; 100% Non-Skippable) = 774, N (Facebook; Mittelwert aus optimierten und Standard-Spots) = 380. N = Anzahl der Werbekontakte.

04

Reaction

Emotional Reaction

Fundamental research

**„THE TRUTH IS WRITTEN
ALL OVER YOUR FACE“**

Paul Ekman

Since the early 1960s, research groups, such as those led by Paul Ekman, have been working hard to understand human emotions.

During their research, the group found strong evidence of universal facial expressions associated with emotions that are shown and correctly recognized around the world.

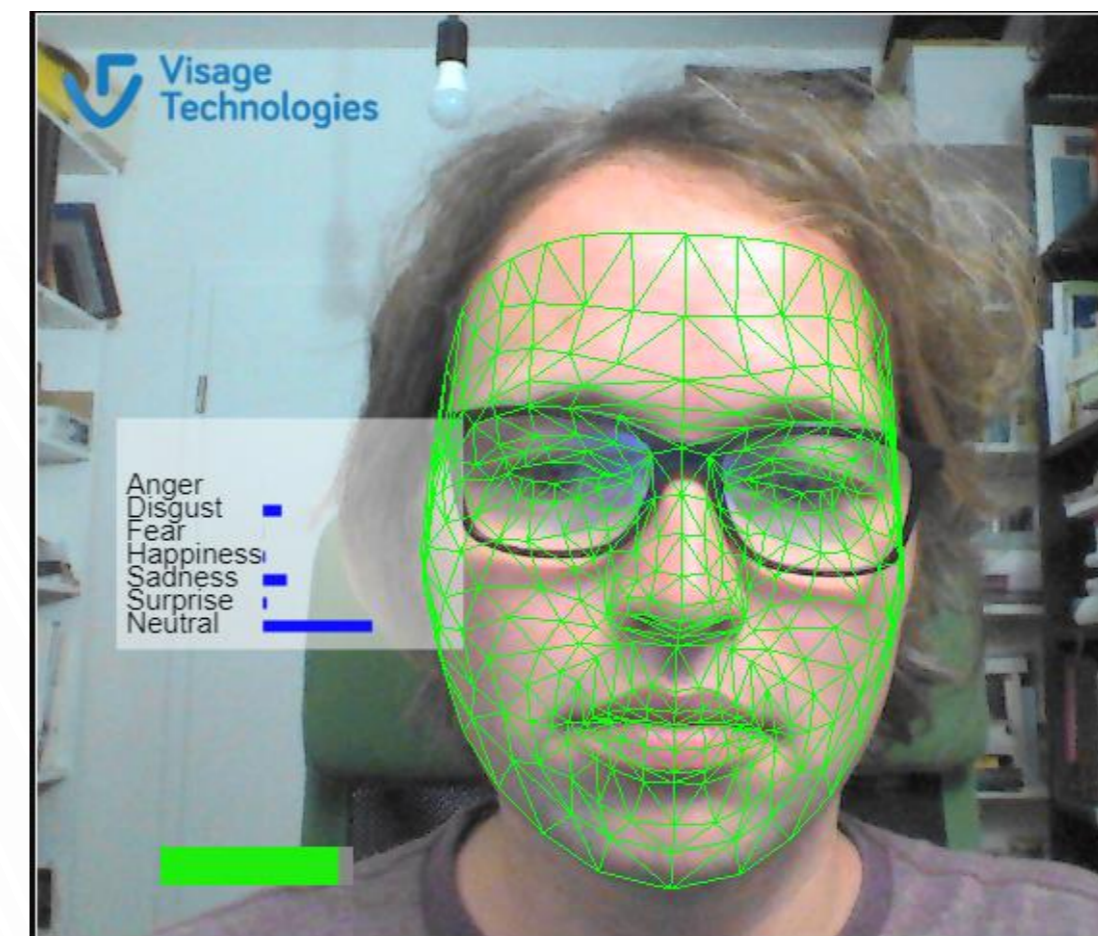


Studienteilnehmer in den USA,
Paul Ekman & Wallace V. Friesen, 1978

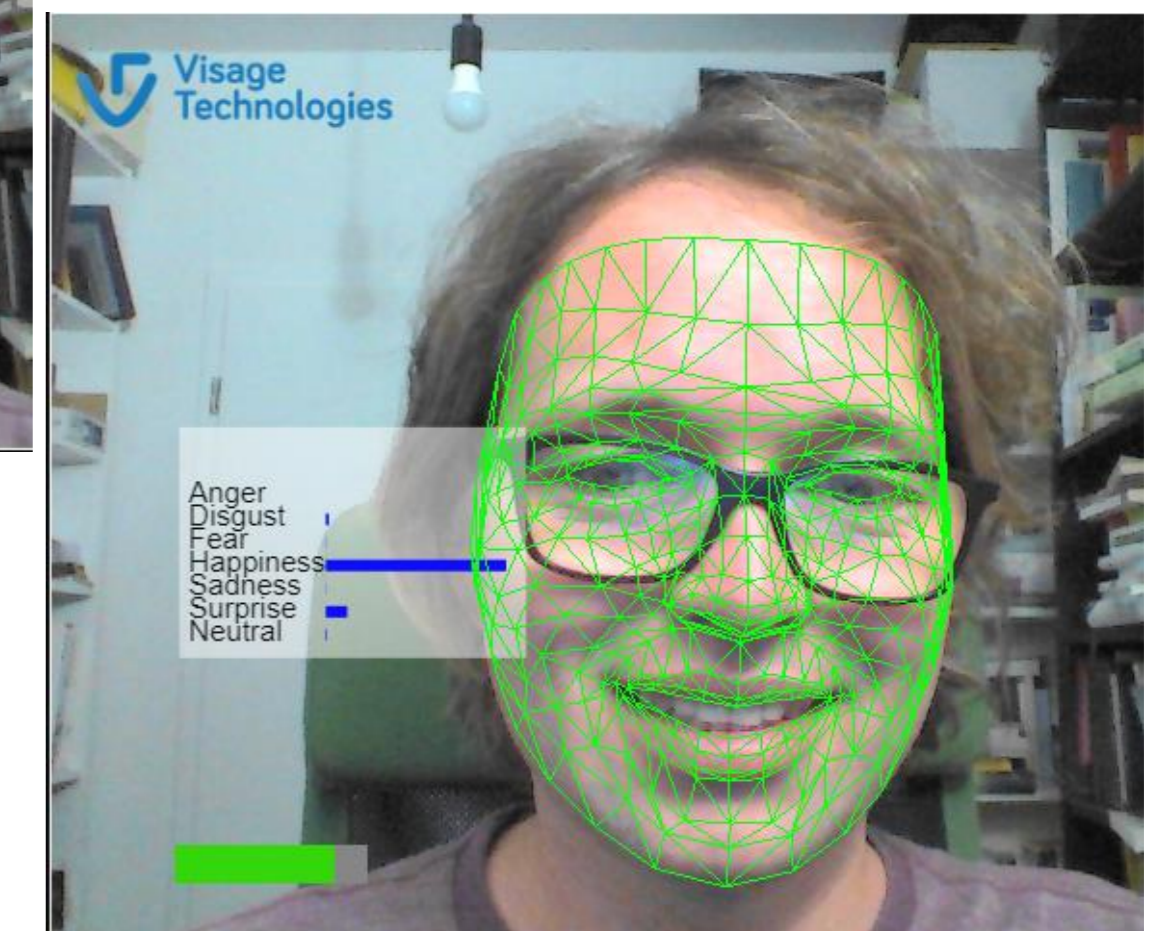
Making emotional impact measurable

The automatic analysis of facial key points by means of webcam and software.

- Through an algorithm, six basic emotions are identified and quantified in participants' facial expressions
- These emotional responses were compared across environments, test groups, and advertising contacts



Neutrale Reaktion



Starke Freude

TV achieves positive emotions the longest

Positive emotionalization while paying attention to the ad



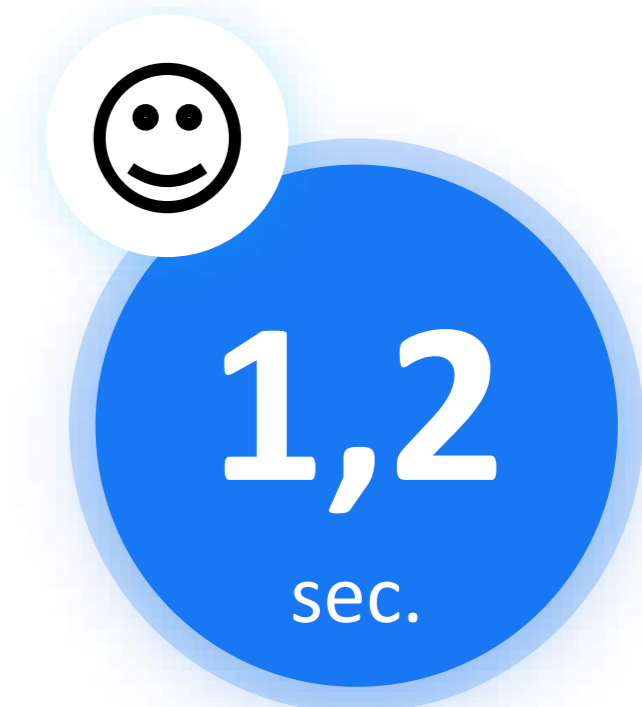
TV



BVOD



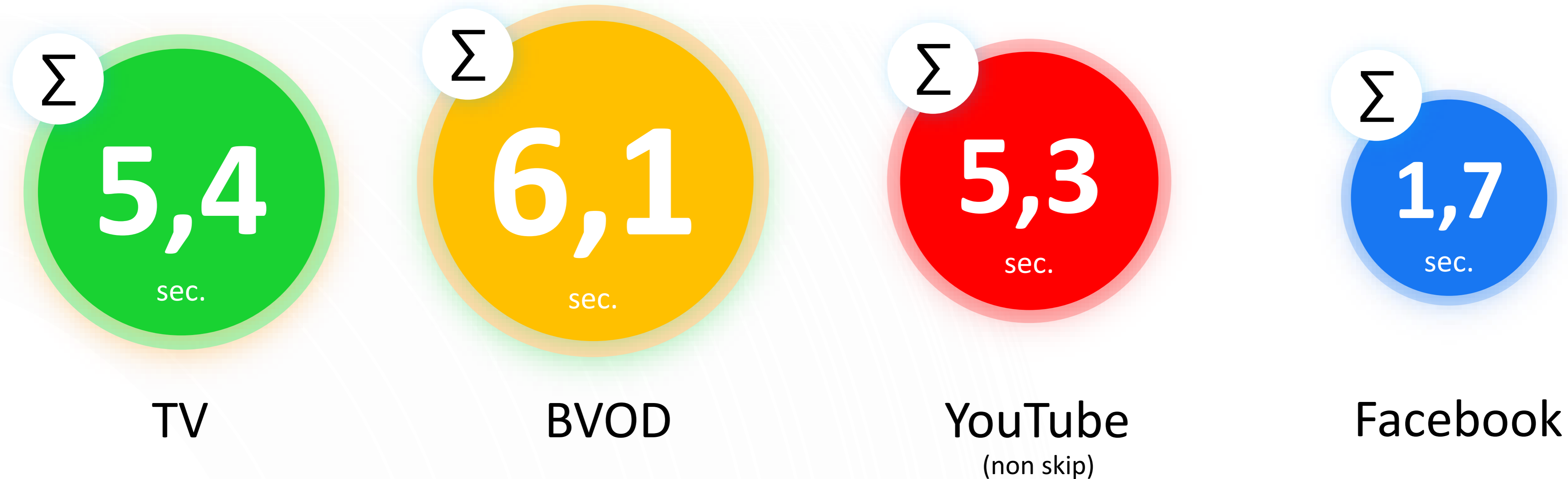
YouTube
(non skip)



Facebook

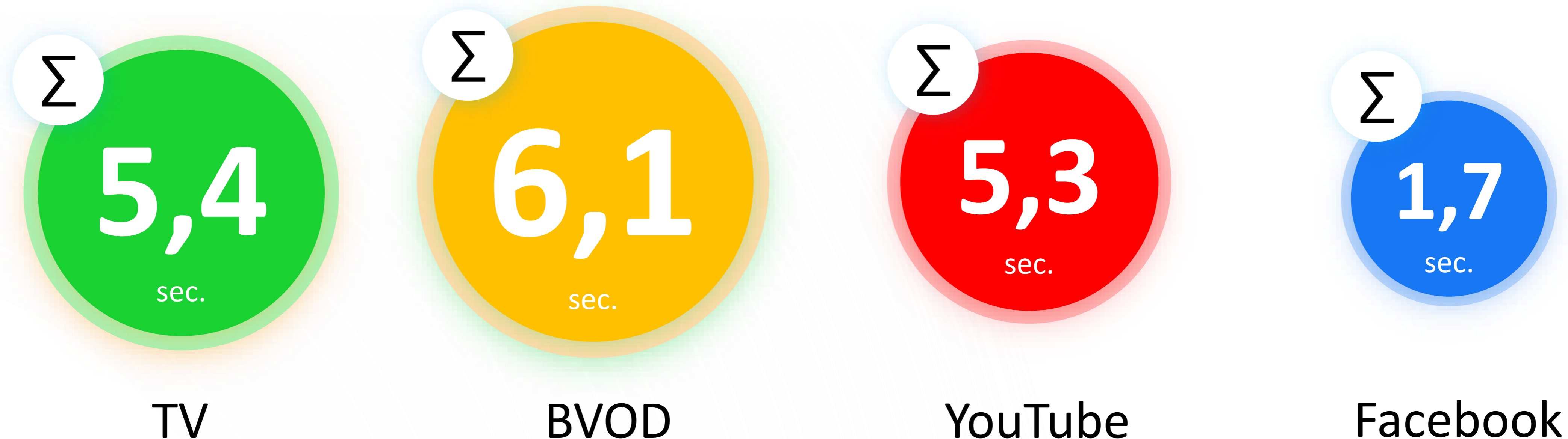
BVOD ahead in emotionalization

Overall emotionalization during attention to the advertising contacts



BVOD ahead in emotionalization

Overall emotionalization during attention to the advertising contacts



TV

BVOD

YouTube

Facebook

(non skip)

(share of spot length in %)

31%

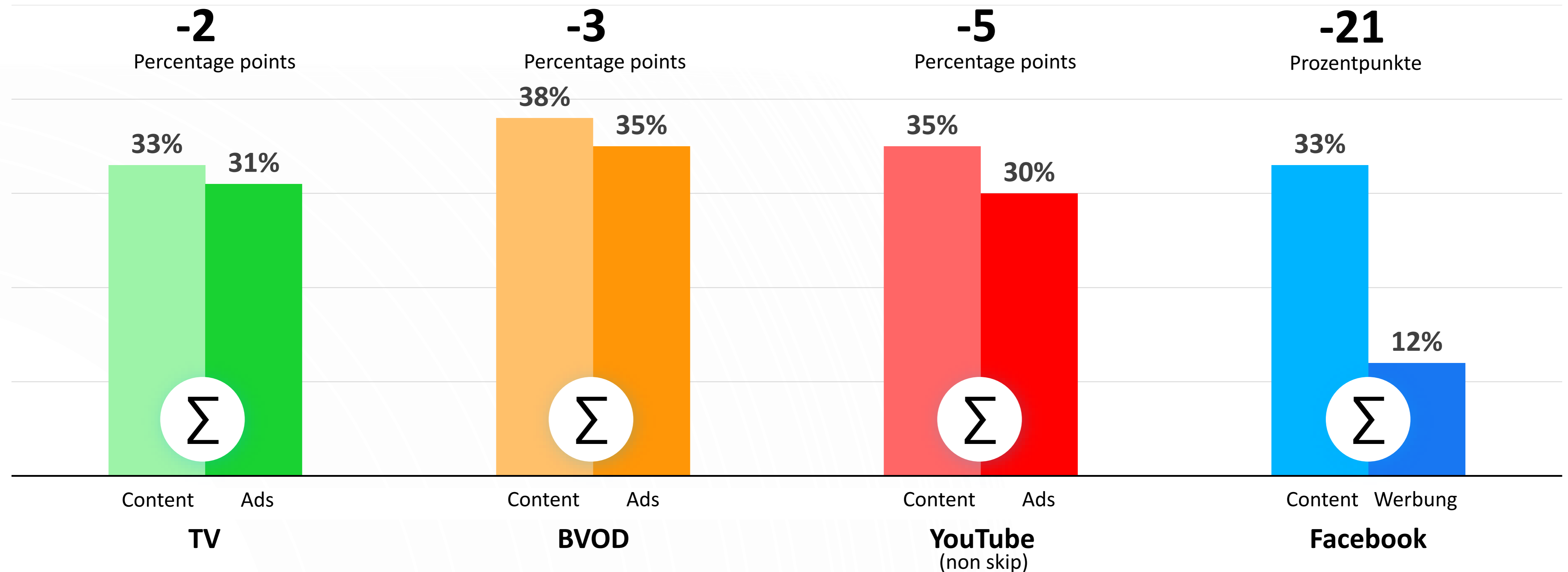
35%

30%

12%

High losses to the content on Facebook

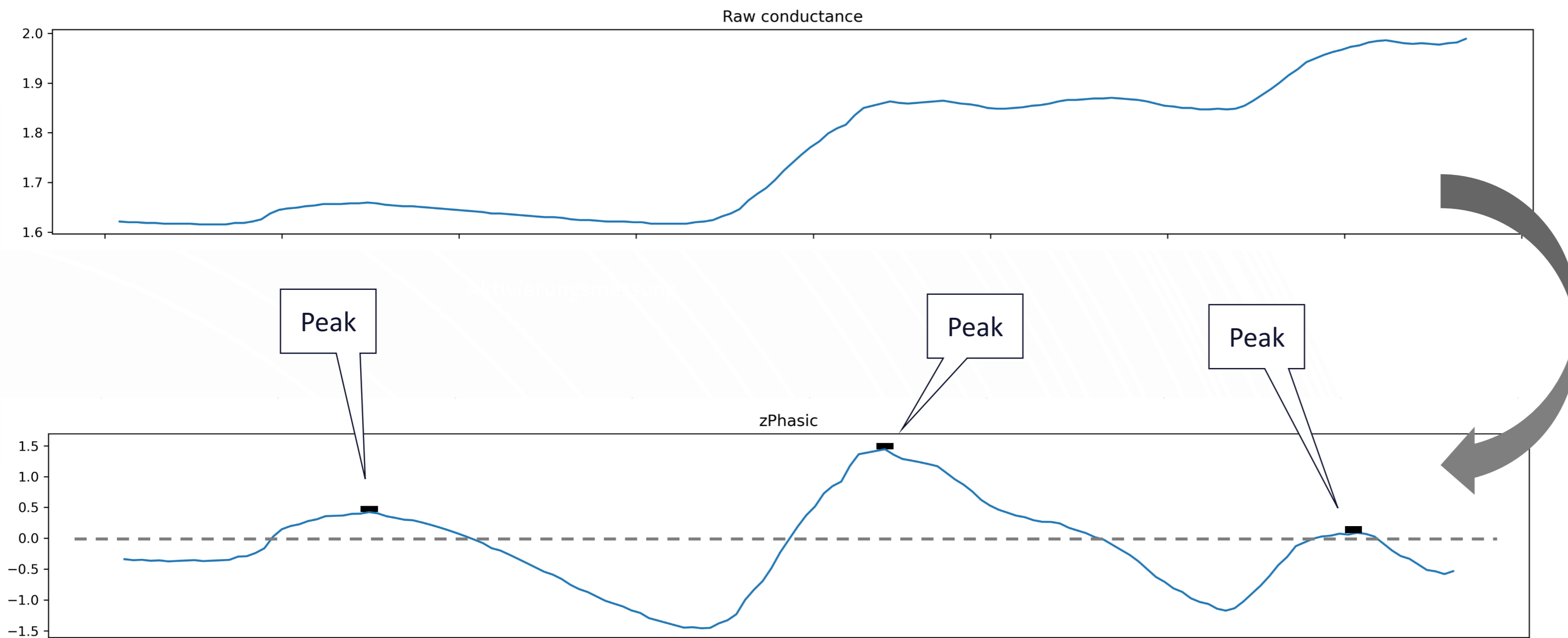
Differences in the overall emotionalization from the content during ads



Gesamte Emotionalisierung: Anteil Emotionalisierung in %; Vergleich zwischen Content und Werbung. Werbekontakte: N (TV) = 476, N (BVOD; TV und Smartphone) = 804, N (YouTube; TV und Smartphone) = 774, N (Facebook) = 380. Content: N (TV) = 120, N (BOVDTV und Smartphone) = 274, N (YouTube; TV und Smartphone) = 225, (Facebook) = 148.

Tension and relaxation

Example of a person, progression during the advertising contact



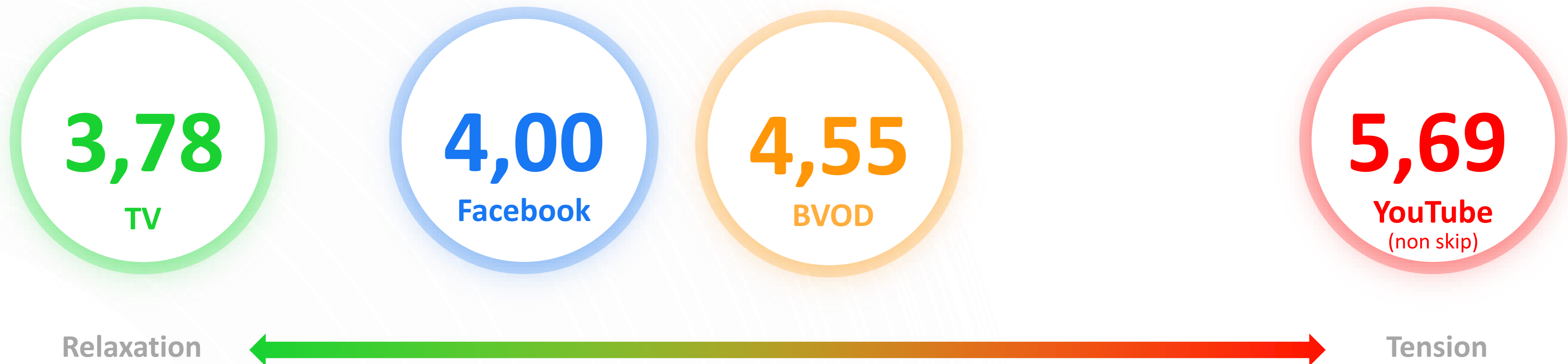
Number of peaks per minute in the z-transformed course during one advertising contact (30 seconds).

Activation measurement

In order to compare the different baseline levels of individual participants, a z-transformation is performed at the personal level and the values are aligned.

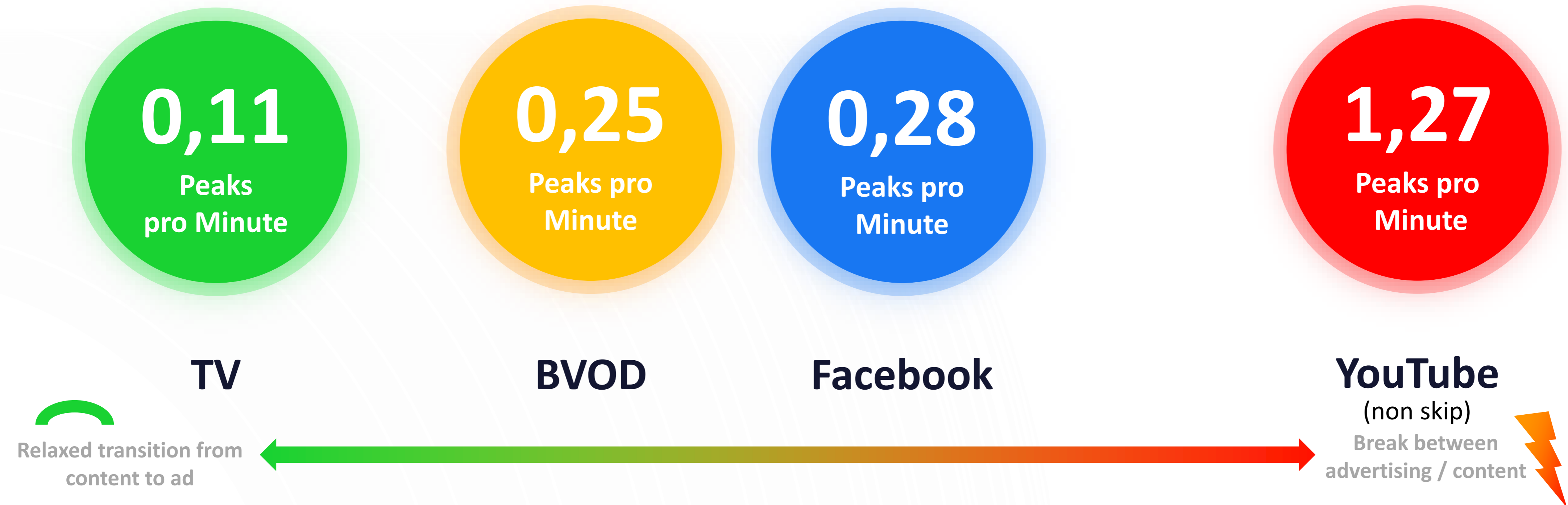
Highest excitement on YouTube and BVOD

Activation (peaks/minute) during advertising



Least change to TV advertising

Change in activation (peaks/minute) from content to advertising

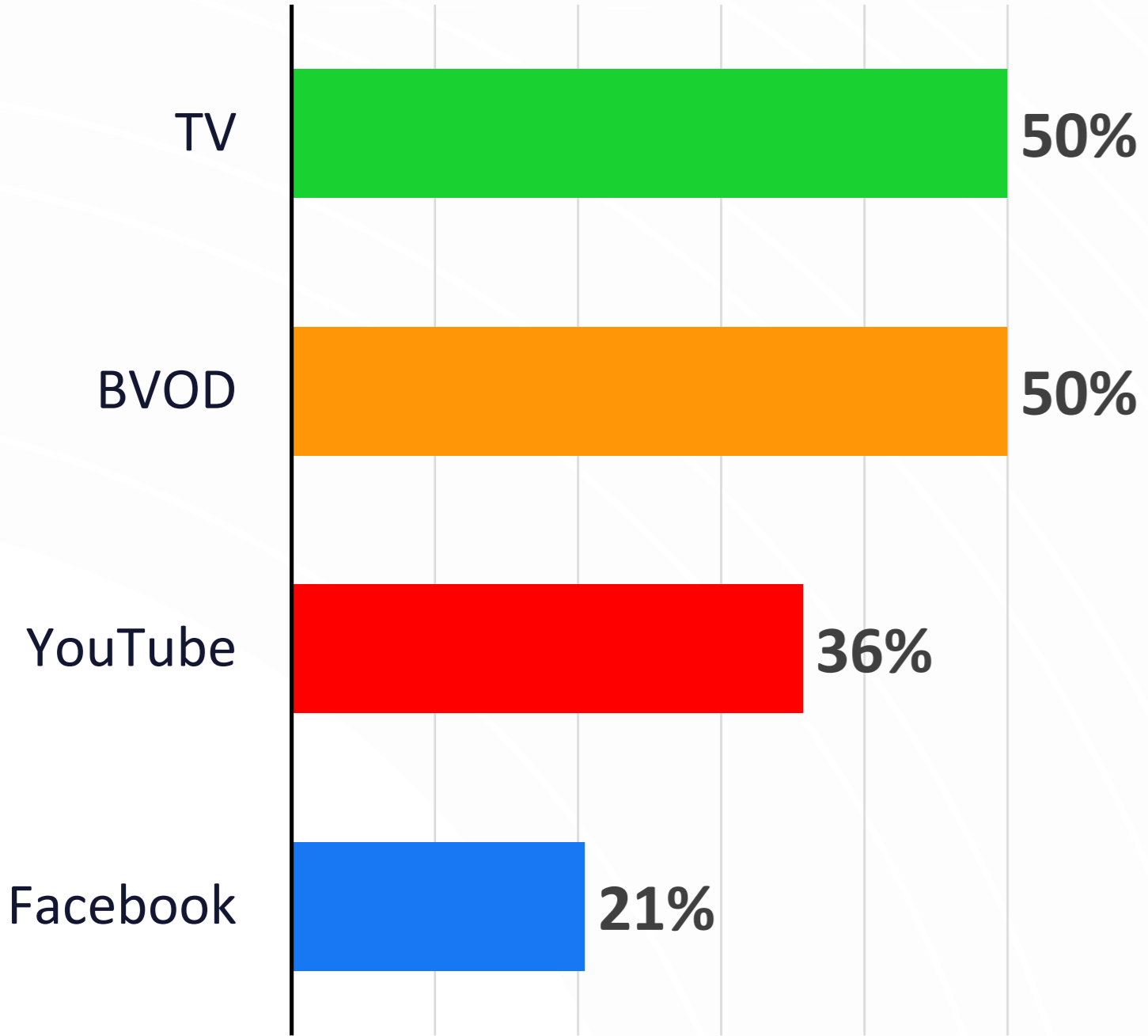


Aktivierungsrespons: Mittelwert der Peaks pro Minute, Veränderung von Content zur Werbung. Content: N (TV) = 97, N (BVOD; TV und Smartphone) = 235, N (YouTube; TV und Smartphone) = 179, N (Facebook) = 118. Werbekontakte: N (TV) = 384 N (BVOD; TV und Smartphone) = 678, N (YouTube; TV und Smartphone) = 617, N (Facebook) = 301.

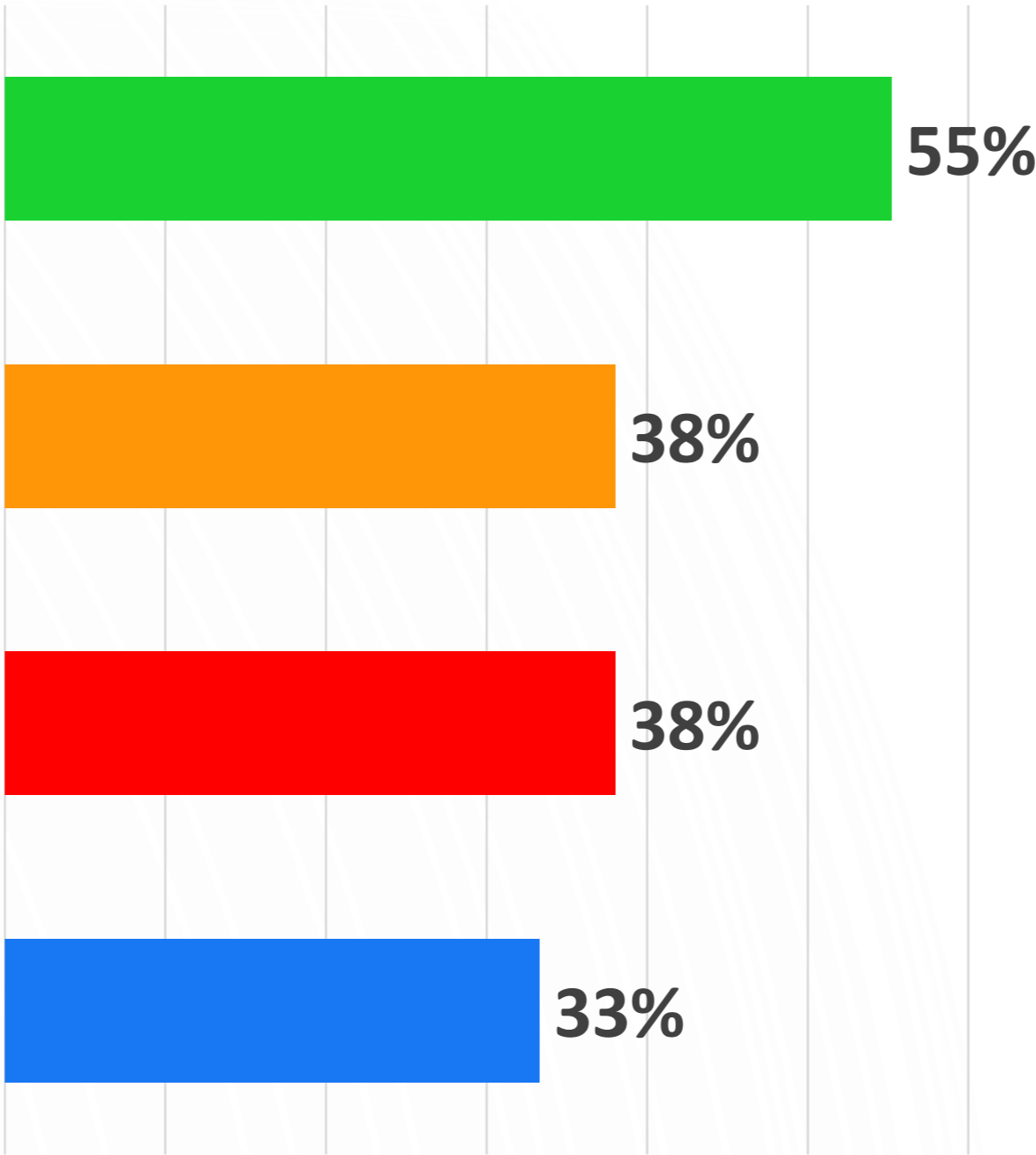
TV and BVOD achieve more trust

Excerpt: Acceptance of advertising on the platforms can also explain the effects

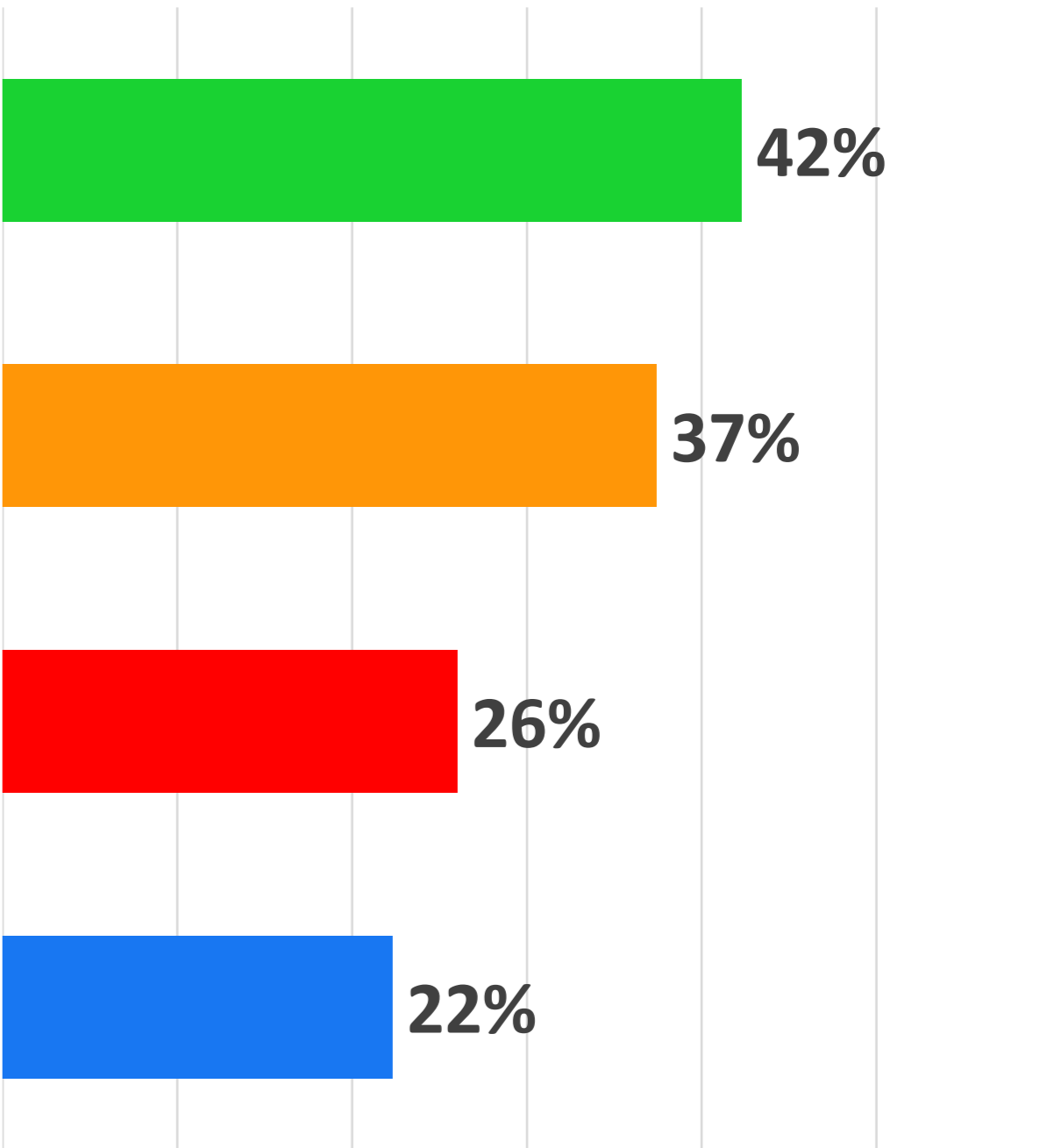
...is trustworthy. (Top 2)



...commercials belong here. (Top 2)



...shows advertising for brands of high quality. (Top 2)



Classic TV as a relaxing medium

Basic activation level across all four usage settings.



TV

Relax with content
and advertising



YouTube

Advertising gets in the
way of relaxation



BVOD

Television mood
despite selection



Facebook

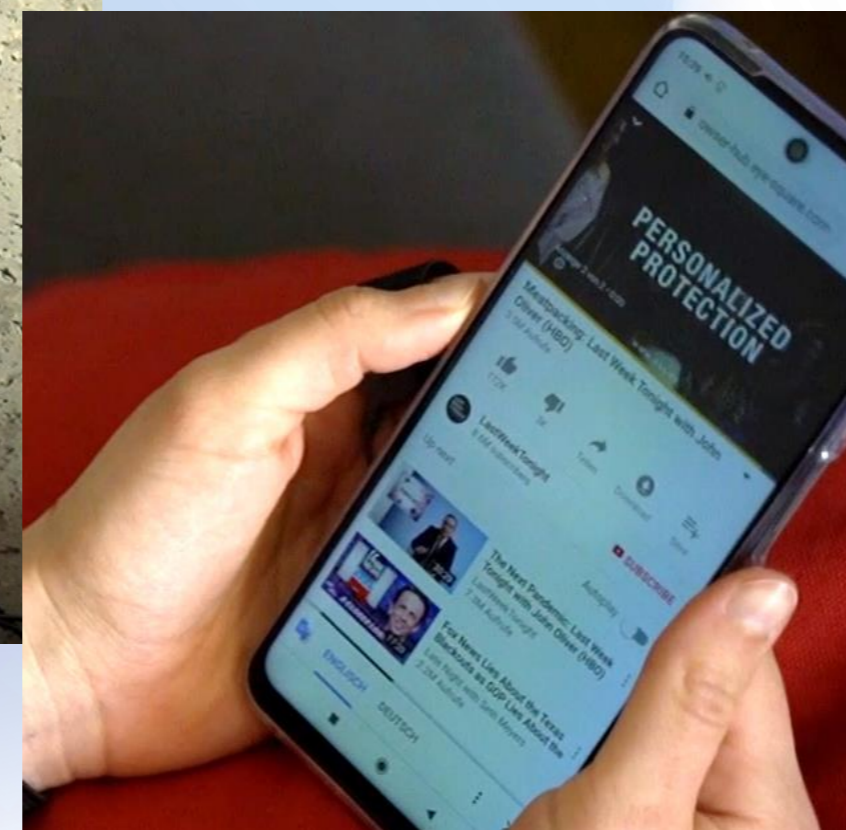
Surf through the
Facebook feed

05

Special analysis Devices

Usage patterns: TV vs smartphone

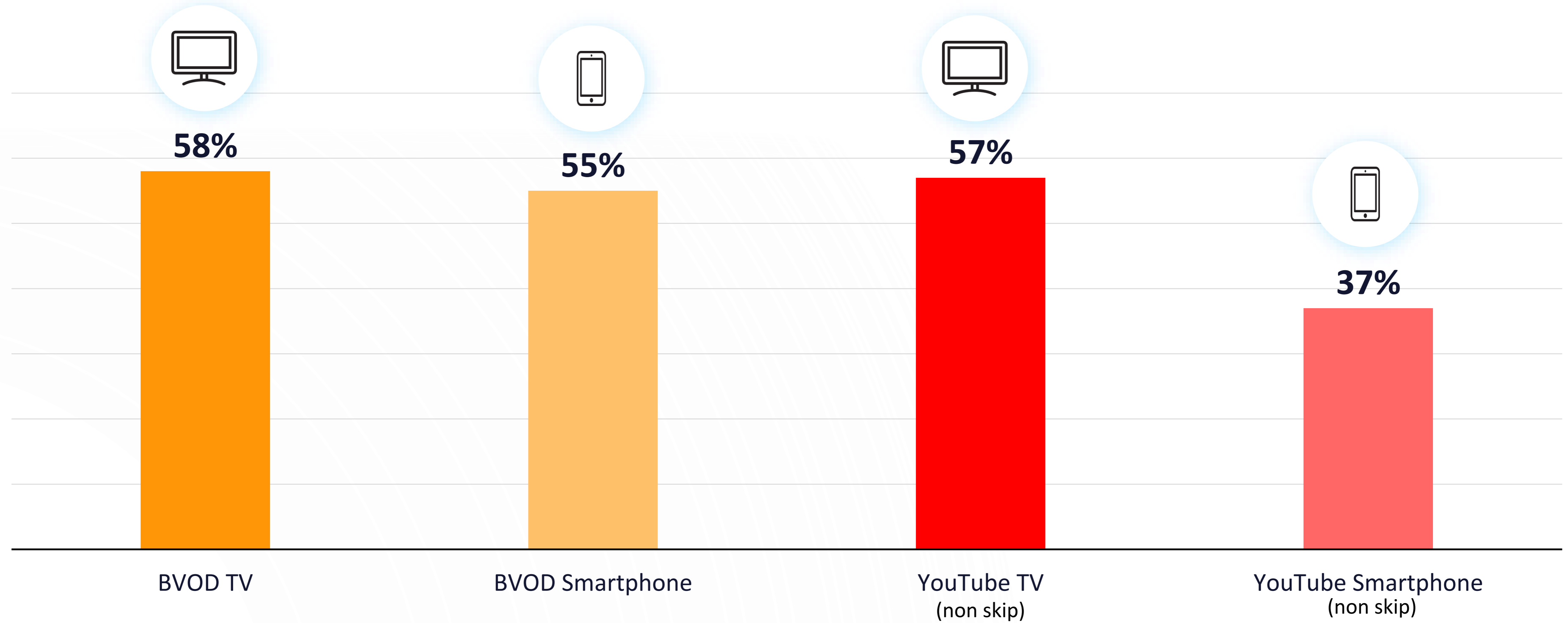
Where can advertising work better?



- Comparison of different usage perceptions by distinguishing the TV screen and smartphone.
- Investigated **BVOD** and **YouTube**

BVOD shows lower loss of effectiveness

Aided ad recall



Verschiedene Darstellungen auf den Medien

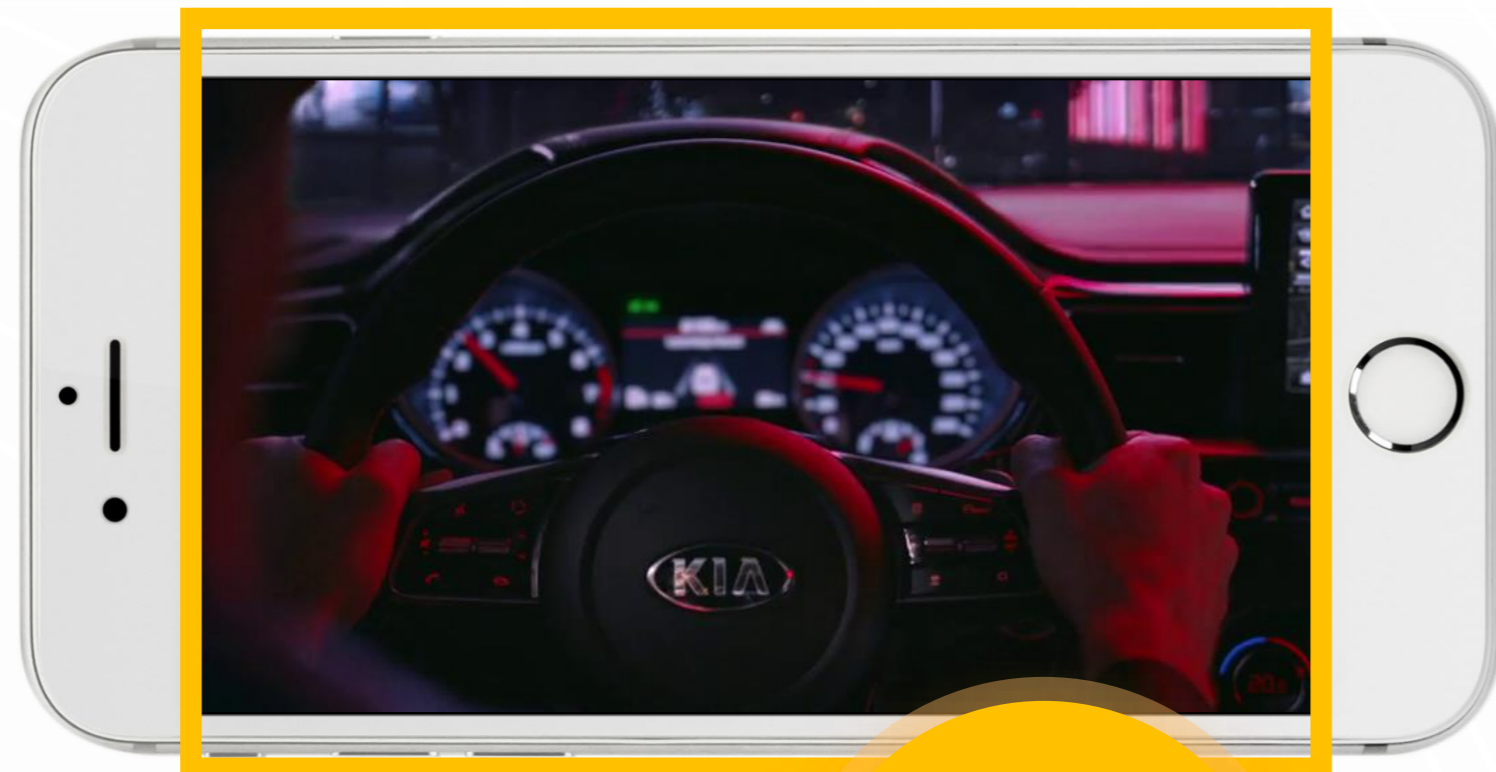
Bildschirm-Modus während der Darstellung von Werbekontakten (in % der Werbekontakte)



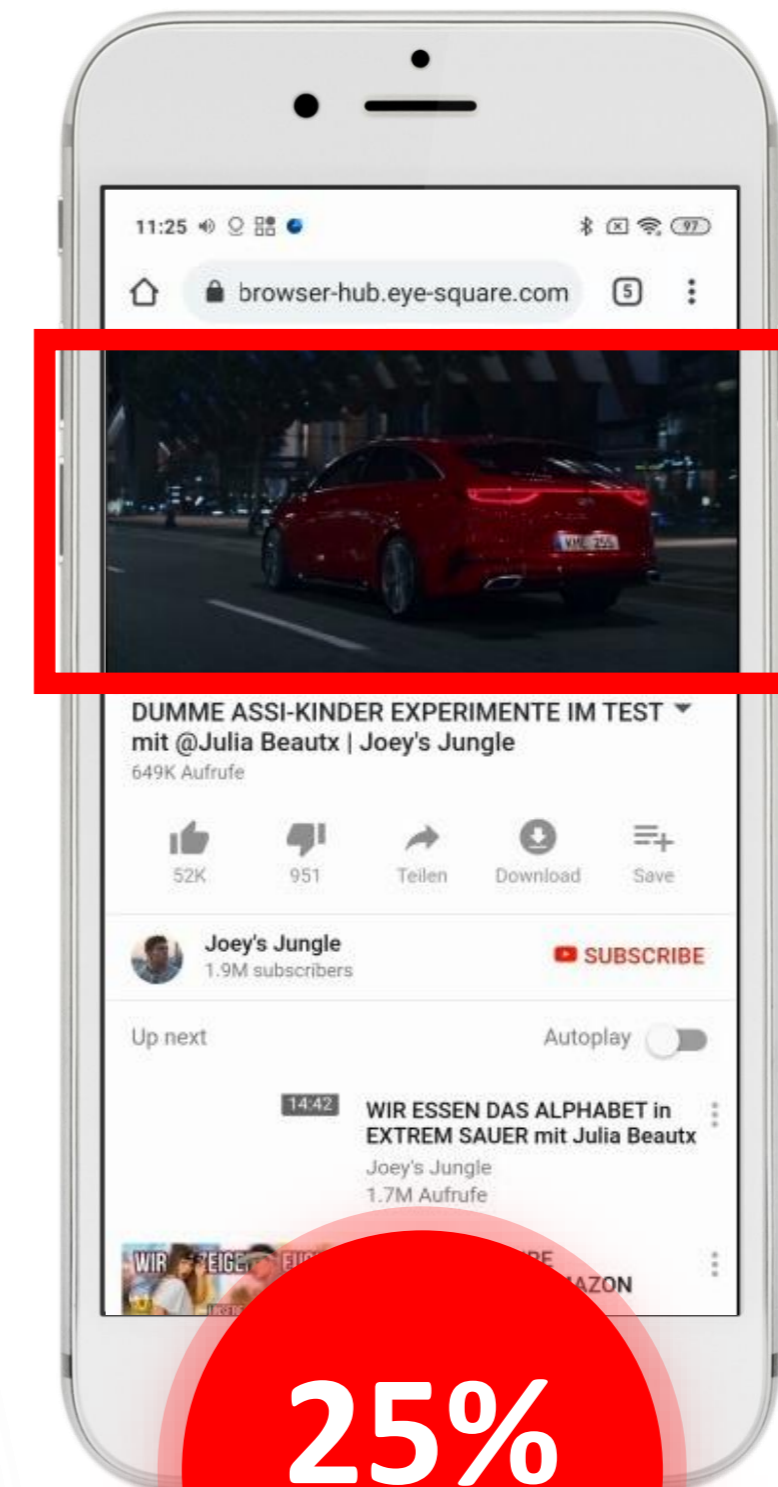
Anteilige Nutzung des Fullscren-Modus bei BVOD und YouTube getrennt nach Endgerät. N (BVOD TV) = 468, N (BVOD Smartphone) = 332, N (YouTube TV; 100% Non-Skippable) = 426, N (YouTube Smartphone; 100% Non-Skippable) = 347. N = Anzahl der Werbekontakte.

Screen coverage on smartphones

Coverage: Percentage of the total screen area represented by the advertising displayed



100%
BVOD



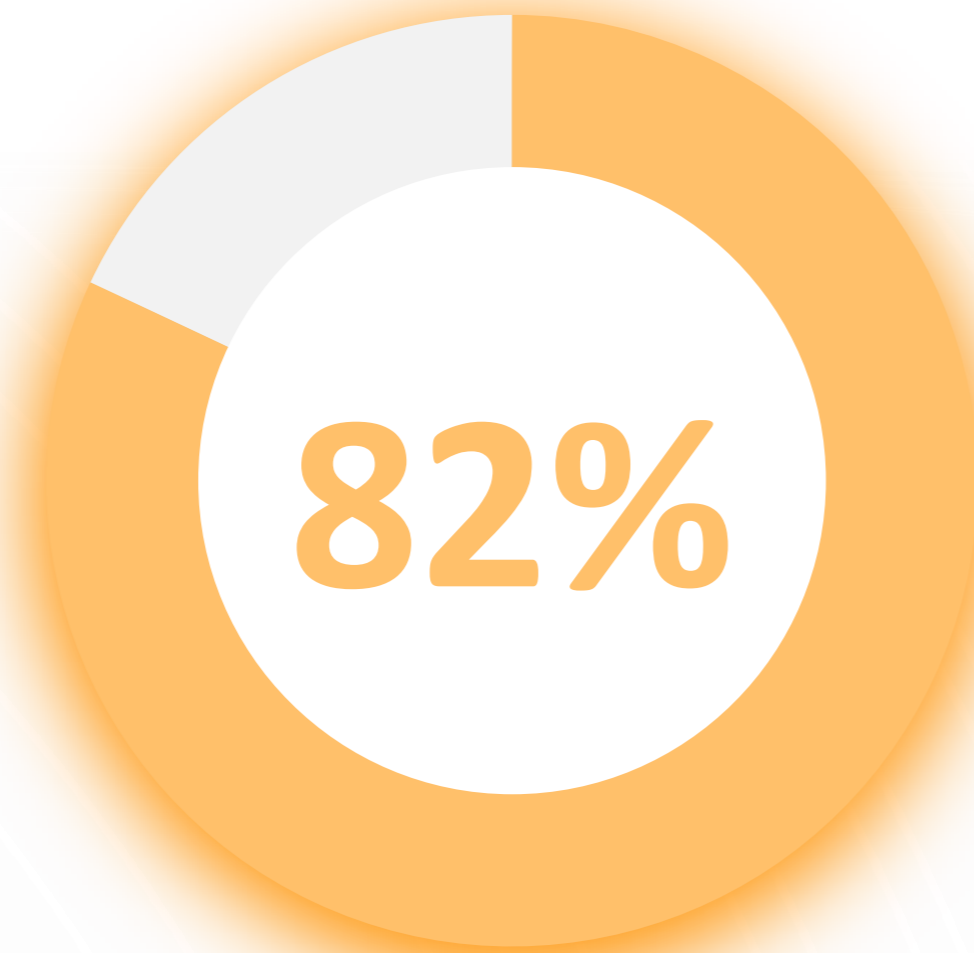
25%
YouTube

YouTube is losing on smartphones

Perception chance: Allowance accounted for by screen coverage



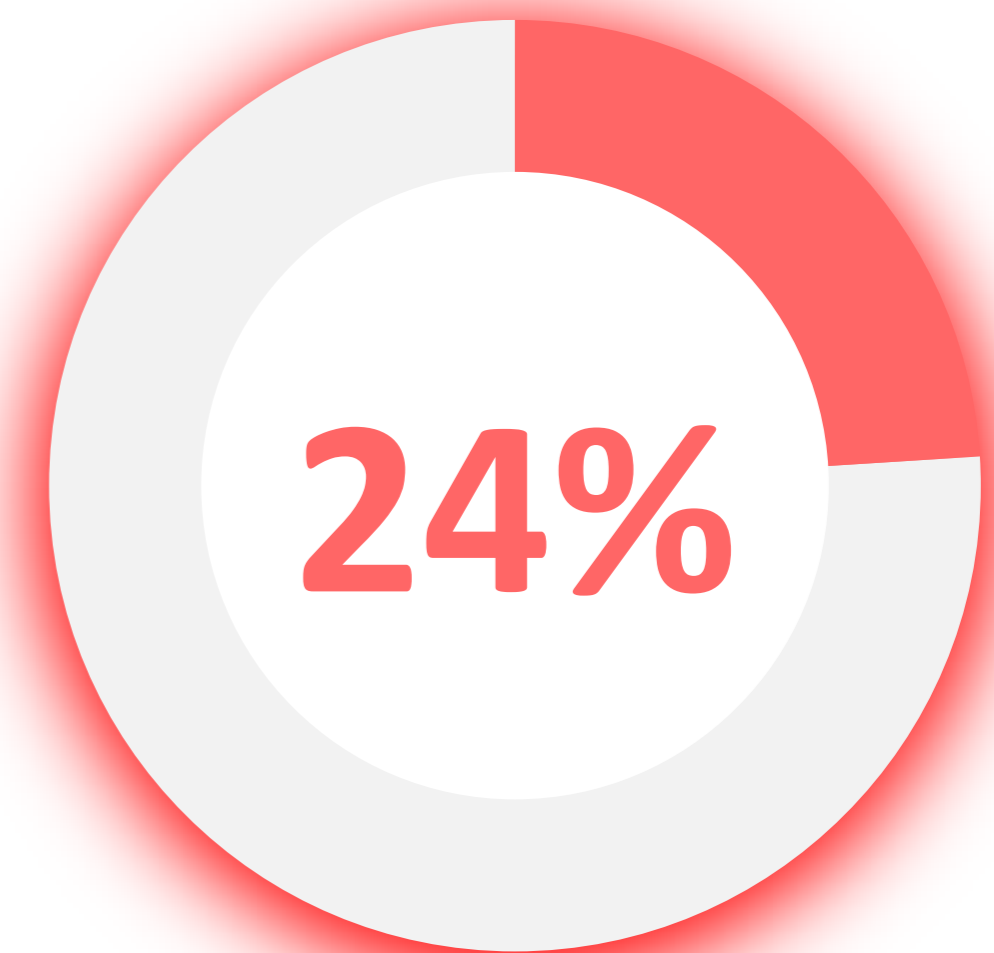
BVOD TV



BVOD Smartphone



YouTube TV
(non skip)

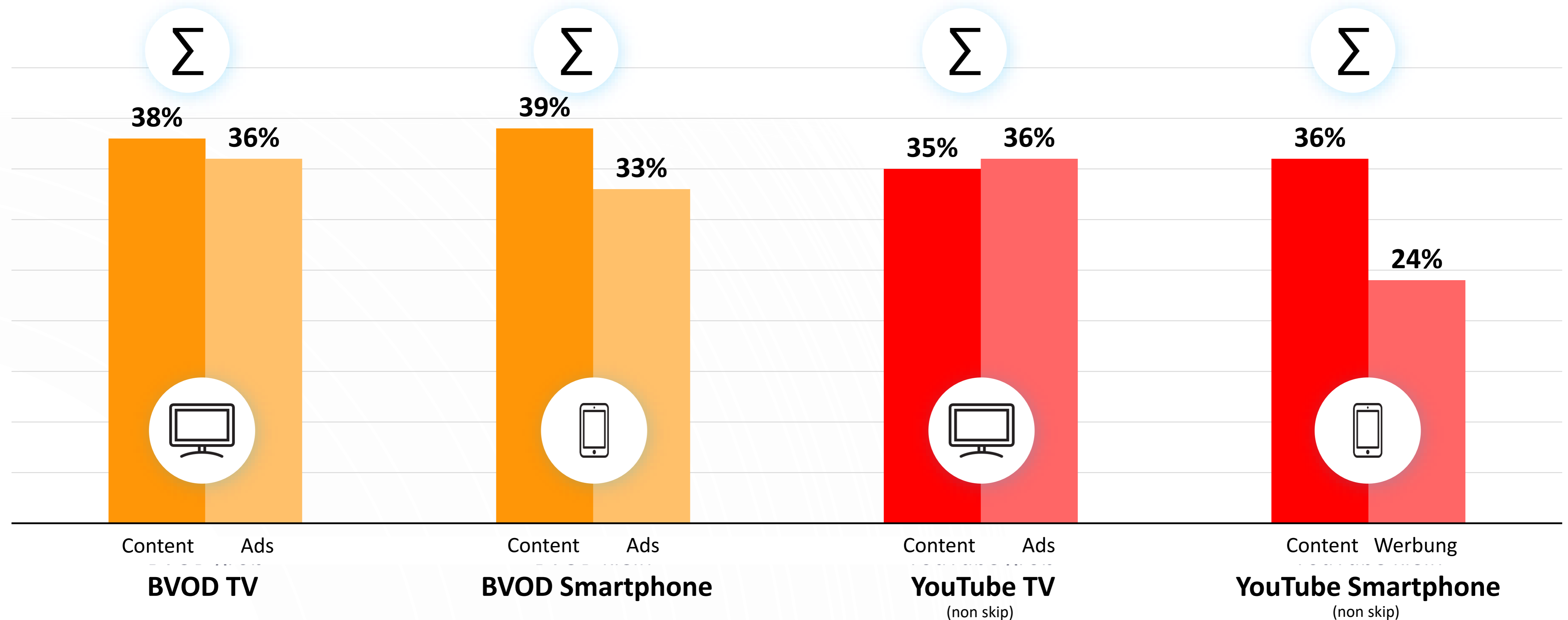


YouTube Smartphone
(non skip)



Content Ad Comparison: Total Emotions

Overall emotionalization of content and advertising

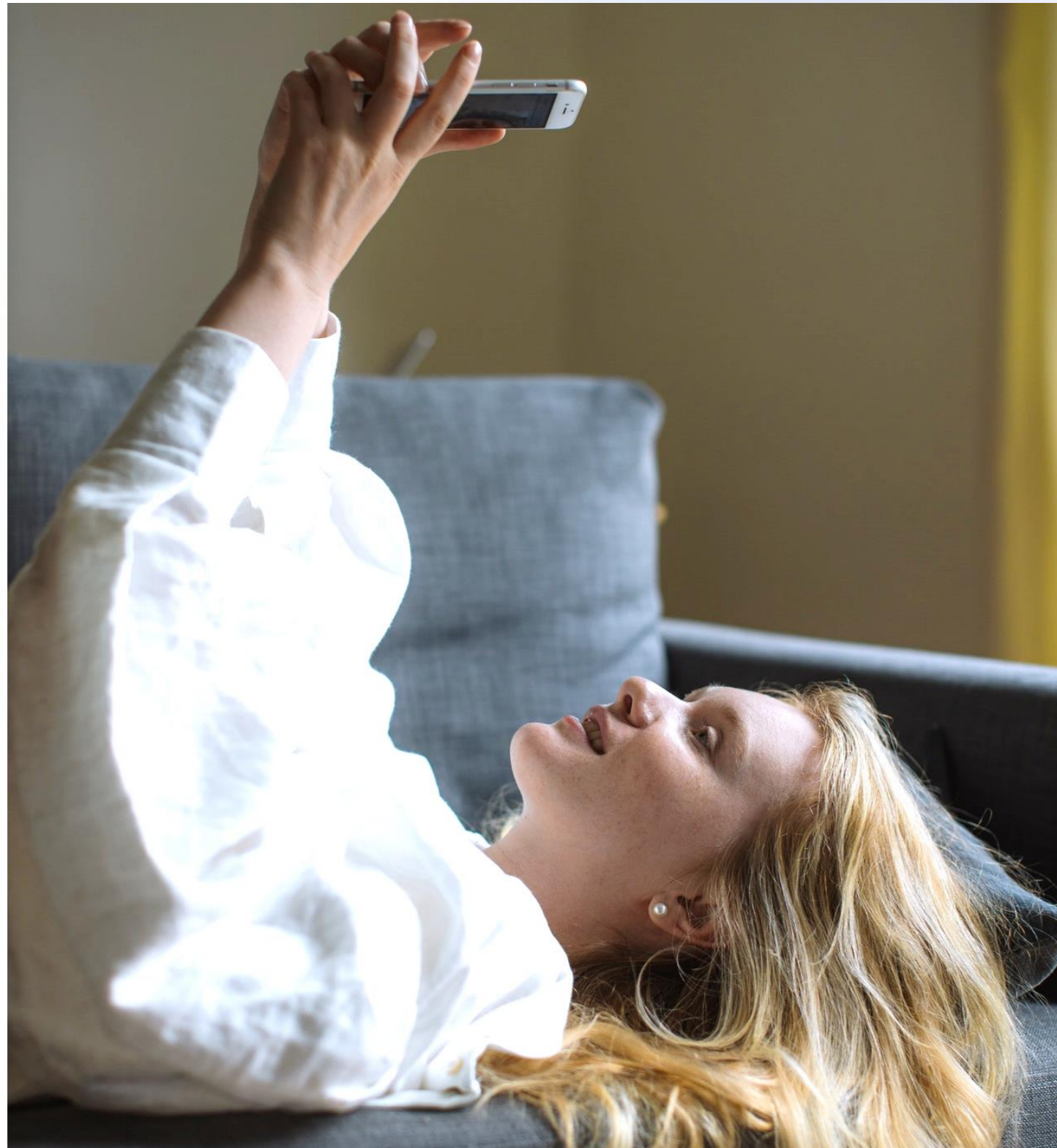


06

Special analysis
Second Screen

Distraction due to second screen use

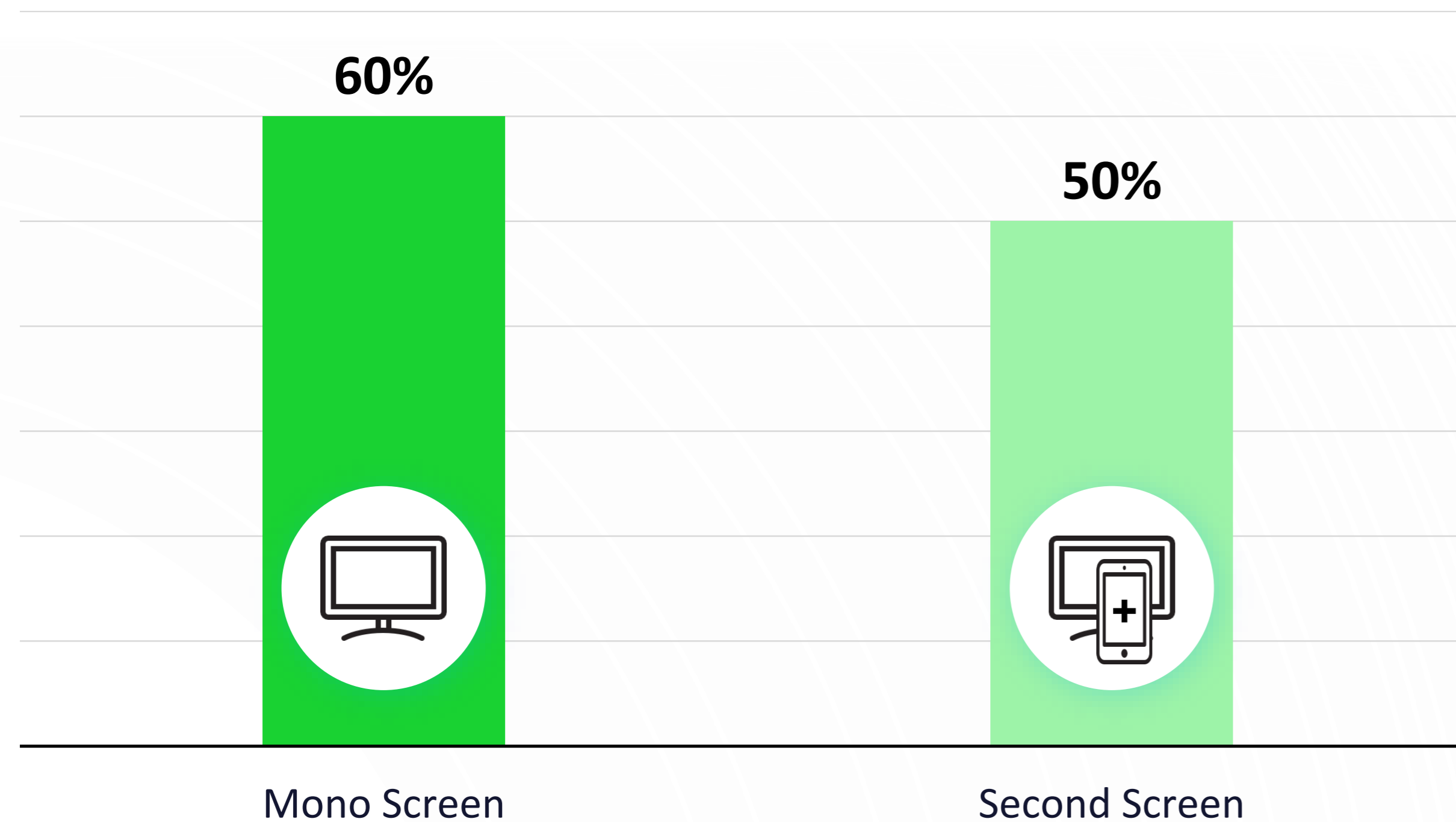
How distracting is the smartphone when consuming media on big screens?



- Investigation of the effect of parallel smartphone use during media consumption, utilizing TV as an example.

Advertising also works with second screen

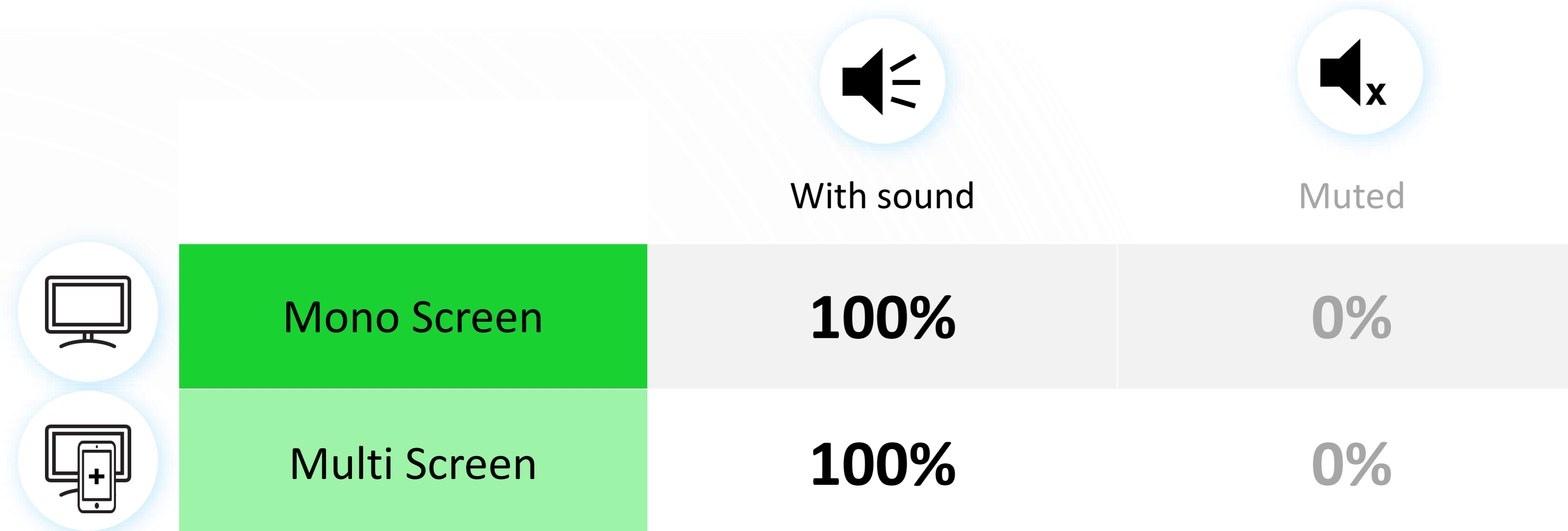
Effects of second screen use during aided ad recall.



**...but even with
Second Screen, TV
is still ahead of
YouTube and
Facebook**

TV with a second screen always has sound

Proportion of spots that were played back with sound switched on



N (Mono Screen) = 476, N (Second Screen) = 434. N = Werbekontakte.

Second screen costs only 2.5 seconds

Focus in sec. and share of advertising in %.



Mono Screen

Second Screen

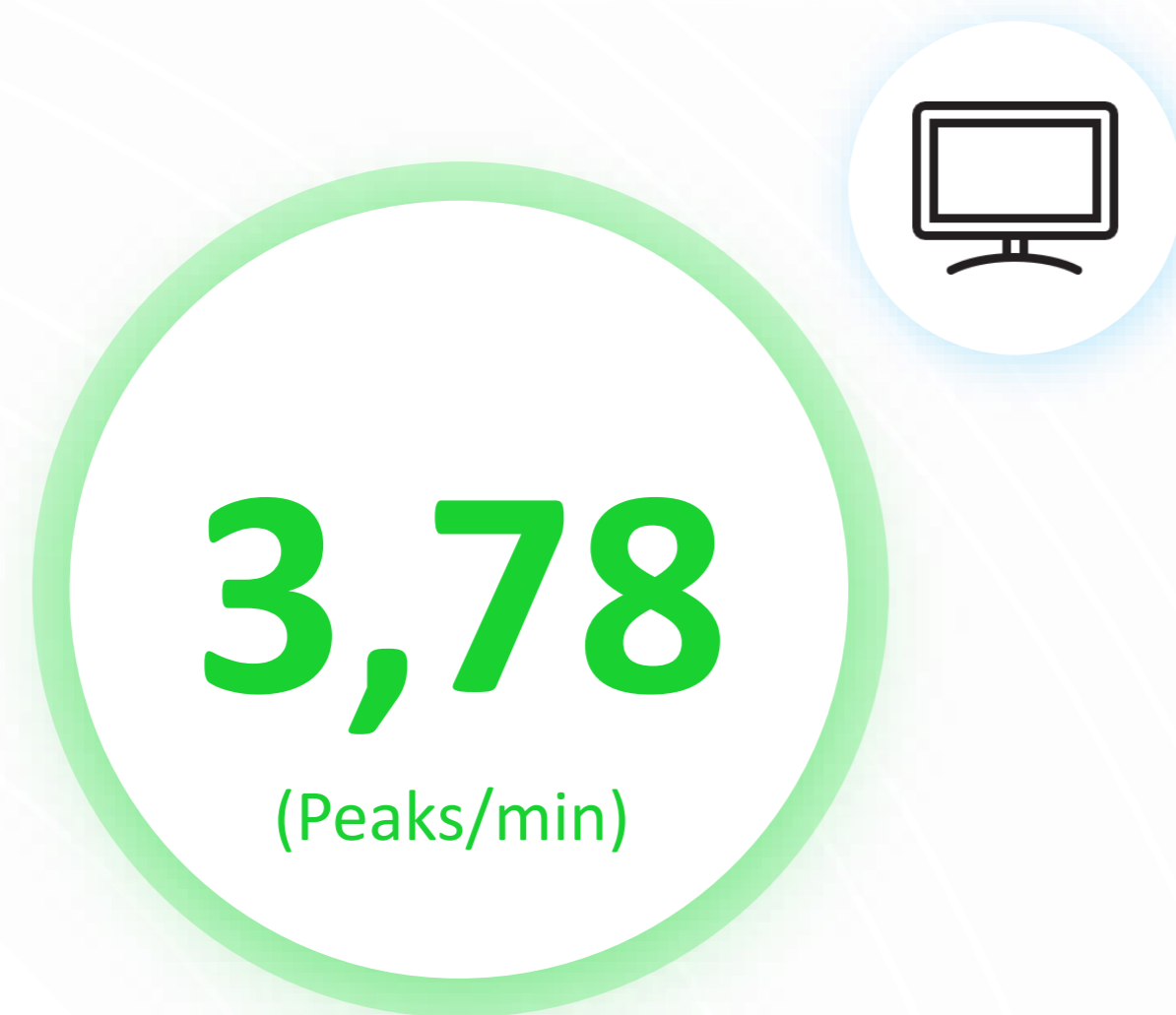
94%

78%

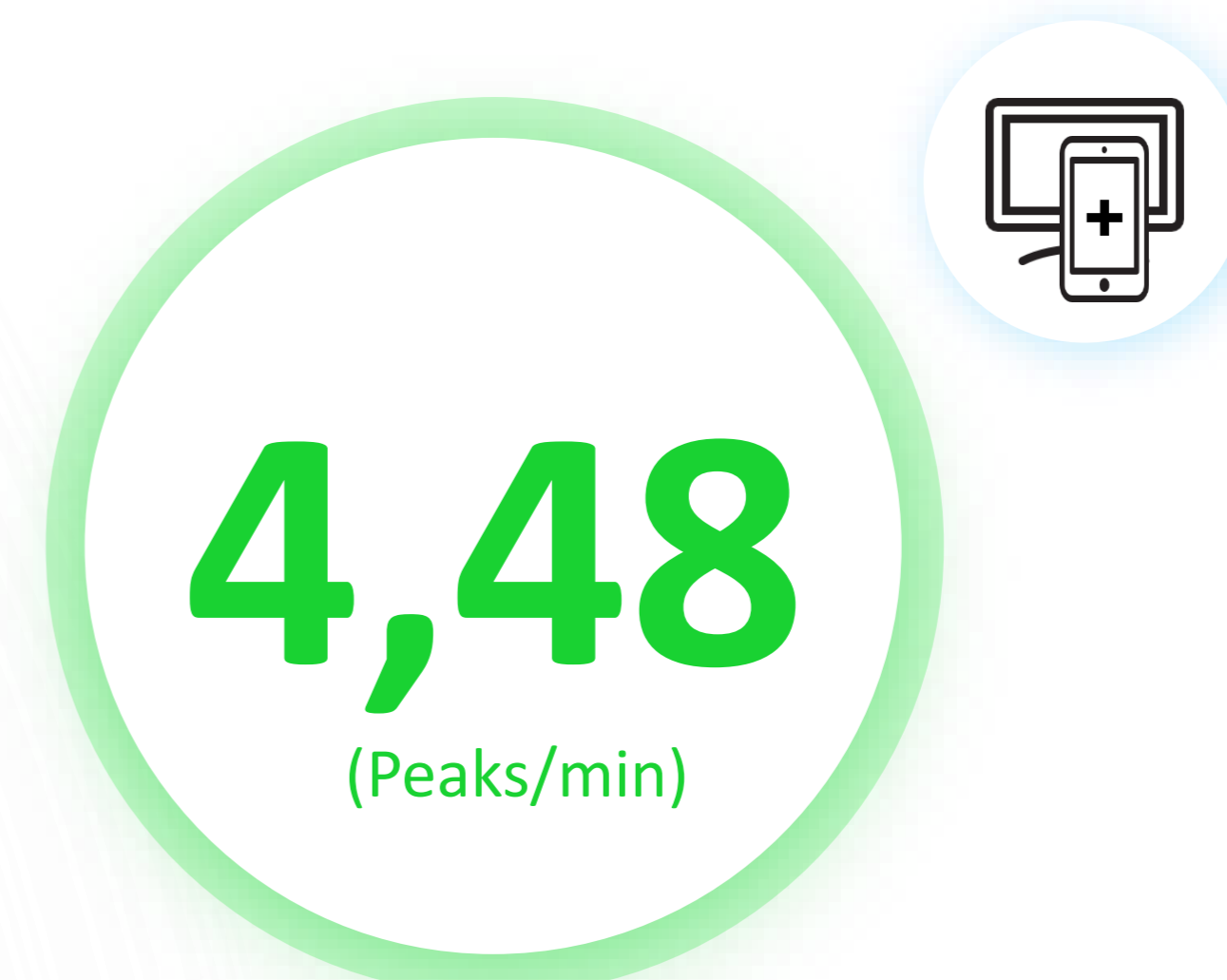
Durchschnittlicher Focus (Zuwendung zum Screen) in sec. und im Verhältnis zur durchschnittlichen Dauer der Werbung in sec. N (Mono Screen) = 476, N (Second Screen) = 434. N = Werbekontakte.

Activation increases: less lean-back mode

Advertising activation
Mono Screen



Advertising activation
Second Screen



Aktivierungslevel (Peaks) während Werbung bei Mono und Second Screen. Werbung: N (Mono Screen) = 384, N (Second Screen) = 374. N = Anzahl Werbekontakte.

07

Special Analysis

Age groups

Age as an additional influencing factor

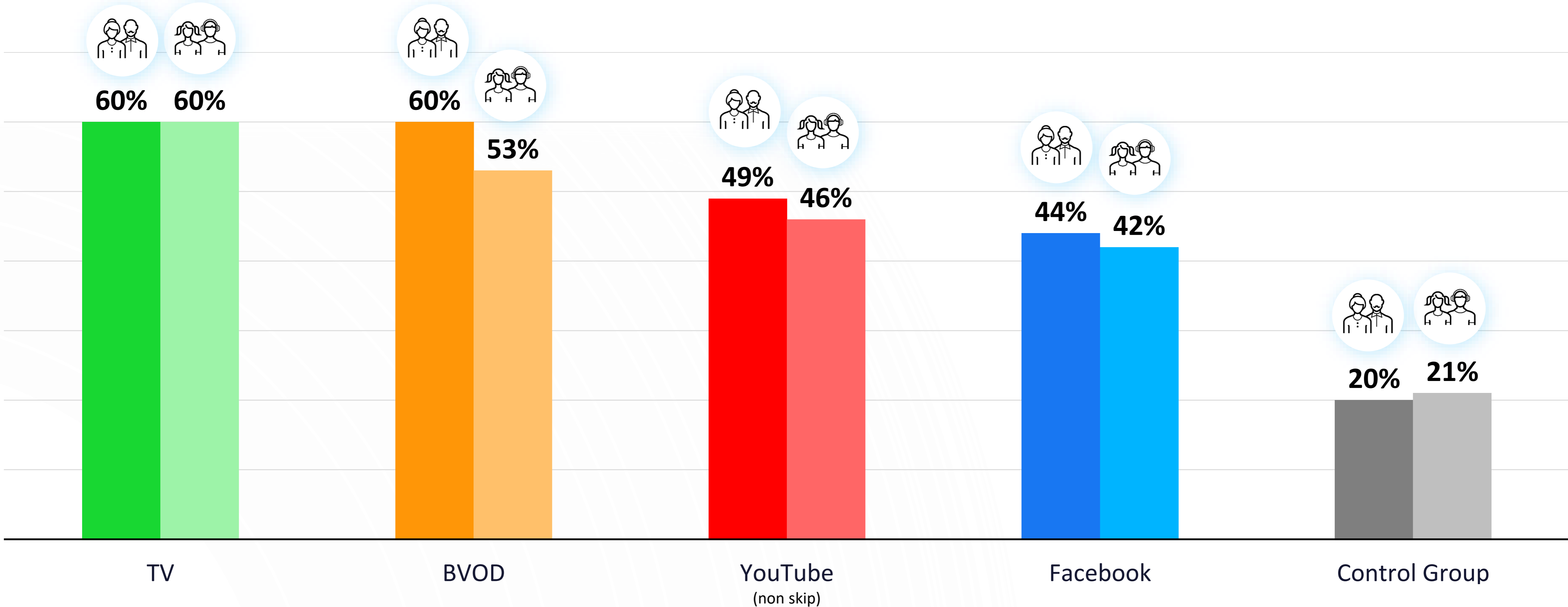
Are there fundamental differences between older and younger target groups?



- Subdivision of all test groups according to age
- Age groups 18-39 years (younger) and 40+ years (older)

TV works for young and old alike

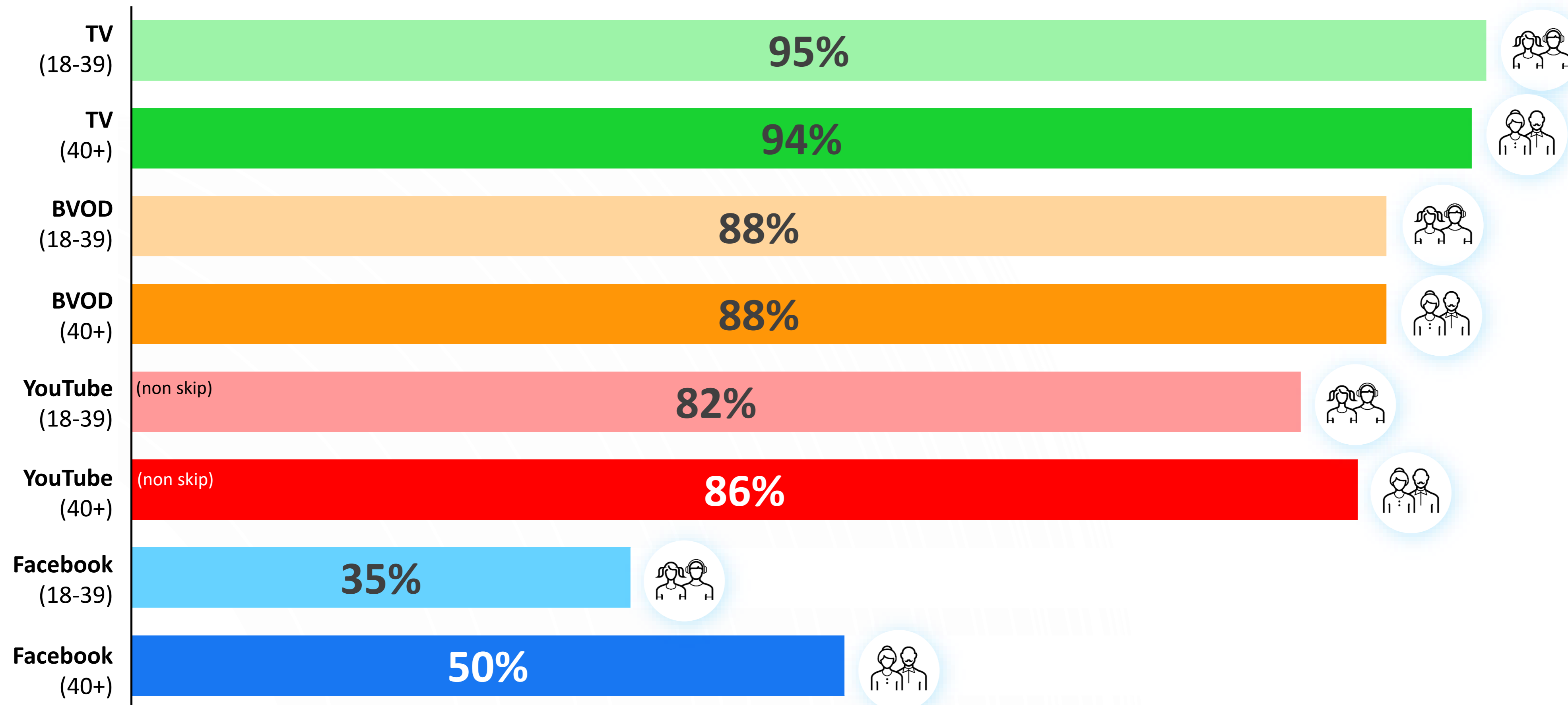
Supported advertising memory



Frage: „Für welche der folgenden Marken aus dem Bereich (Branche) haben Sie in letzter Zeit Werbung gesehen?“ N (TV; 18-39 J) = 199, N (TV; 40+ J) = 224, N (BVOD; 18-39) = 481, N (BVOD; 40+) = 490, N (YouTube; 18-39) = 511, N (YouTube; 40+) = 516, N (Facebook; 18-39) = 259, N (Facebook; 40+) = 257, N (Kontrollgruppe; 18-39) = 215, N (Kontrollgruppe; 40+) = 221. N = Anzahl Werbekontakte.

Facebook shows low values again

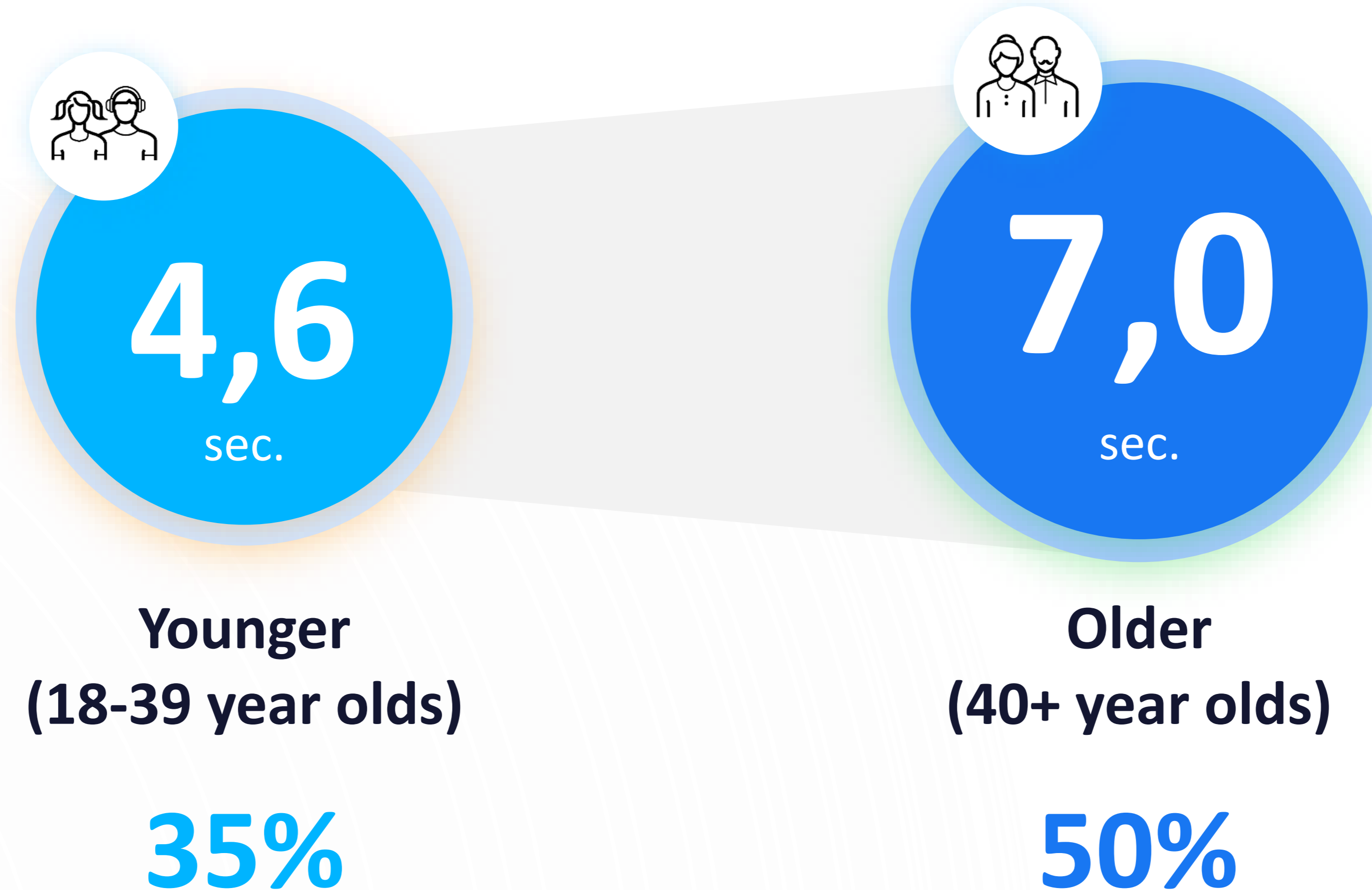
Proportionate focus on advertising with the average length of commercials



Durchschnittlicher Focus (Zuwendung zum Screen) im Verhältnis zur durchschnittlichen Dauer der Werbung N (TV, 18-39 J) = 227, N (TV, 40+ J) = 222, N (BOVD TV und Smartphone, 18-39 J) = 400, N (BOVD, TV und Smartphone, 40+ J) = 374, N (YouTube, TV und Smartphone, 18-39 J) = 363, N (YouTube, TV und Smartphone, 40+ J) = 401, N (Facebook, 18-39 J) = 174, N (Facebook, 40+ J) = 198. N = Anzahl der Werbekontakte.

Facebook: Significantly shorter for younger people

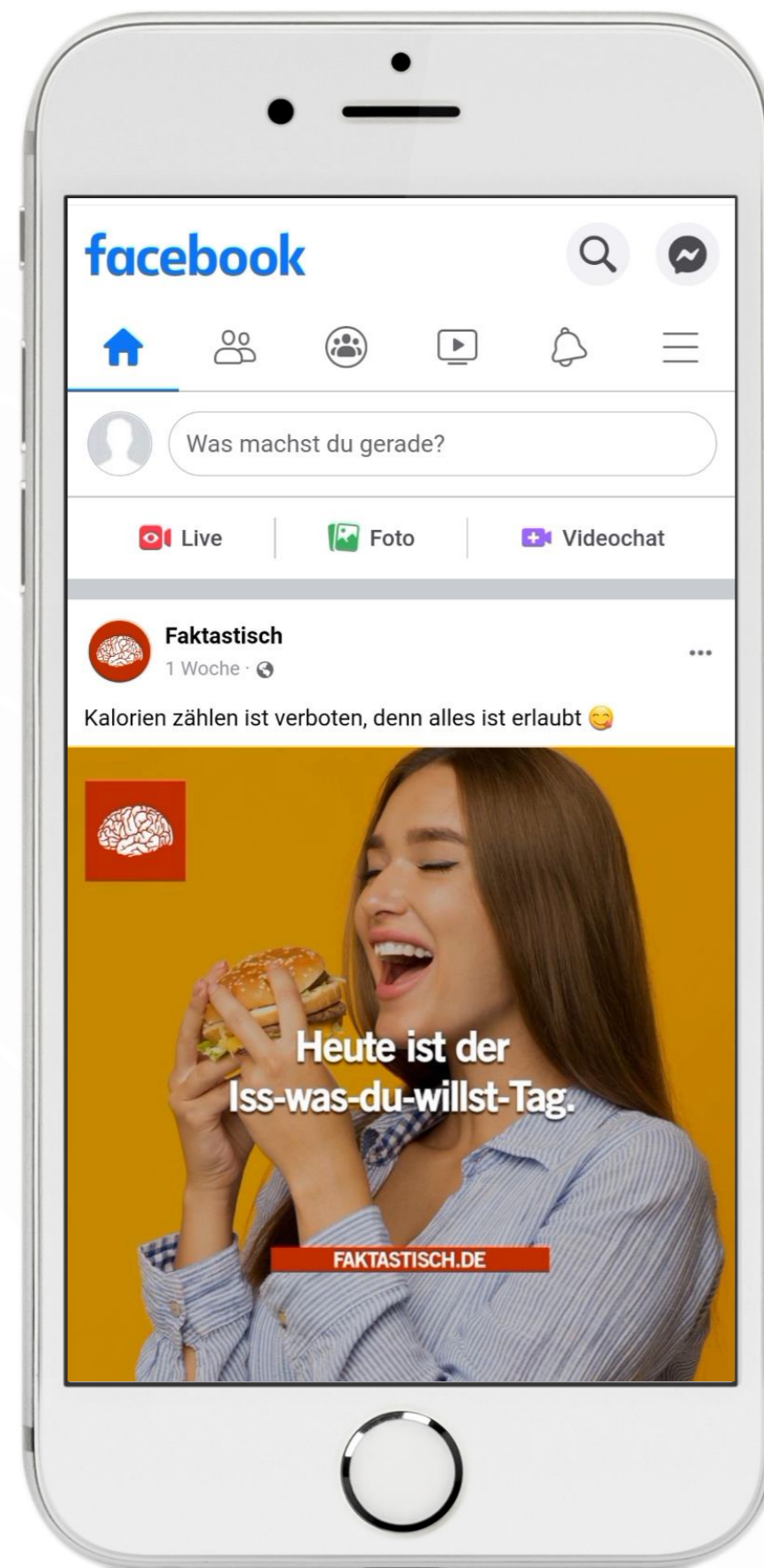
Focus and percentage of advertising contrasted in an age comparison



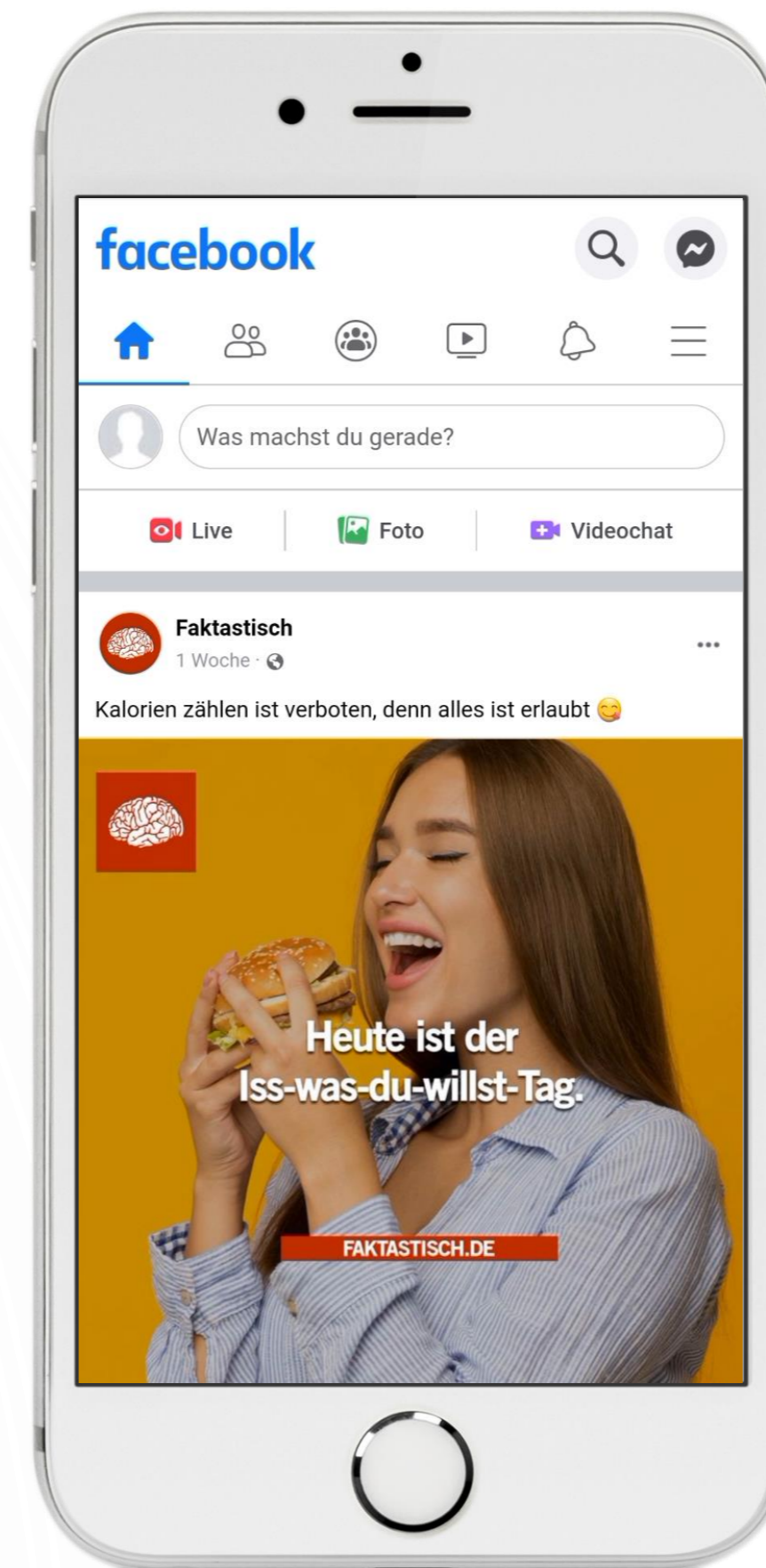
...but why is this?

Scroll speed is the explanation

Example differences in scrolling behavior for two Facebook users



Younger
(18-39 years old)



Older
(40+ years old)

08

Outline and Key Takeaways

Contact quality accounts for advertising potential



	Settings		Perception opportunity			Reaction		Acceptance	Advertising potential			
TV	1	1	1	1	1	2	1	1	1	1	2	1
BVOD	1	1	2	1	2	1	2	2	2	2	1	1
YouTube (non skip)	1	2	3	2	3	3	4	3	3	3	3	2
Facebook	2	3	4	3	4	4	3	4	4	4	3	3
	System 0 (Perception)					System 1 (Implicit condition)			System 2 (explicit effect)			

Settings: 1. Einschalteter Ton 2. Vollbild-Nutzung. Aufmerksamkeit: 3. Sichtbarkeit der Werbung 4.. Bildschirmabdeckung der Werbung 5. Reale Sichtbarkeit der Werbung (Eyes on Ad). Reaktion: 6. Gesamt-Emotionalisierung der Werbung 7. Aktivierung der Werbung (Unterschied Ad/Content, je höher desto schlechter, geht als negativer Wert ein 8. Akzeptanz = Mittelwert aus den Top2-Zustimmungen auf die Aussagen „Ist vertrauenswürdig“ und „Werbung gehört dazu“. Werbewirkung: 9. Freie Erinnerung 10. Gestützte Erinnerung 11. Detailliertheit 12. Kaufabsicht.

Key Takeaways

Media Comparison

1. TV content has the highest advertising impact, YouTube and Facebook well behind
2. TV content: highest visibility and most intensive perception
3. Advertising on TV content has the strongest emotional impact; the reception is very balanced

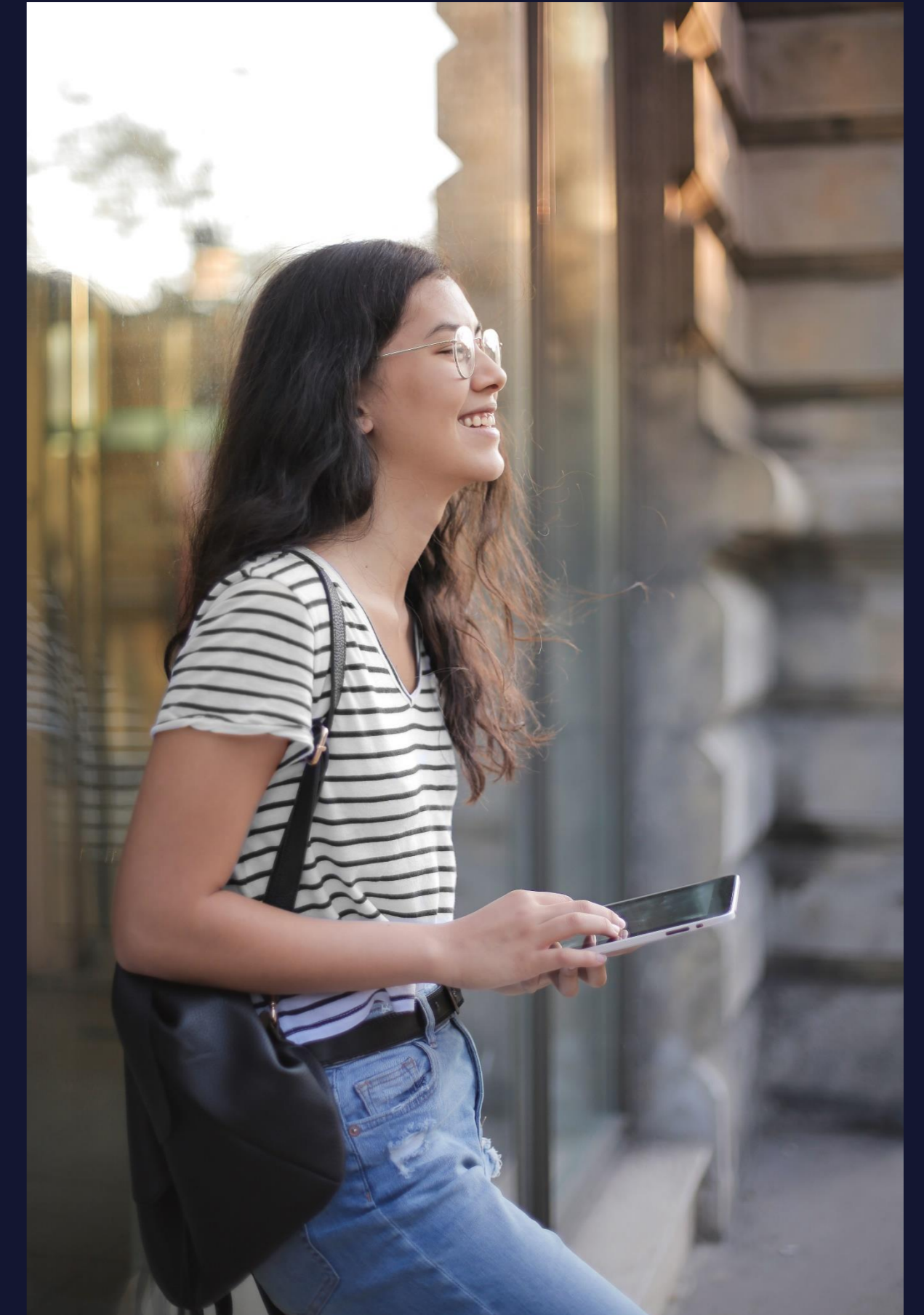
Special Analysis

1. **It is usage situation instead of the device that determines advertising impact; for YouTube, it's less about contact quality and advertising impact on smartphone**
2. Only slight loss of impact with second screen use; advertising is still very present
3. TV advertising just as strong with younger people as with older people; due to more fleeting use of YouTube on the smartphone and Facebook, the effect tends to be weaker with younger people.



Future plans

- The results on the effect reductions through skippable ads on YouTube are in progress.
- An extension of the study into the out-of-home area for BVOD, YouTube and Facebook is already planned and will be carried out in 2021.



Track the Success

Thank you for your attention!