BVOD in focus: planning for success

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@ThinkboxTV

Welcome

Anthony Jones, Head of Research
Thinkbox

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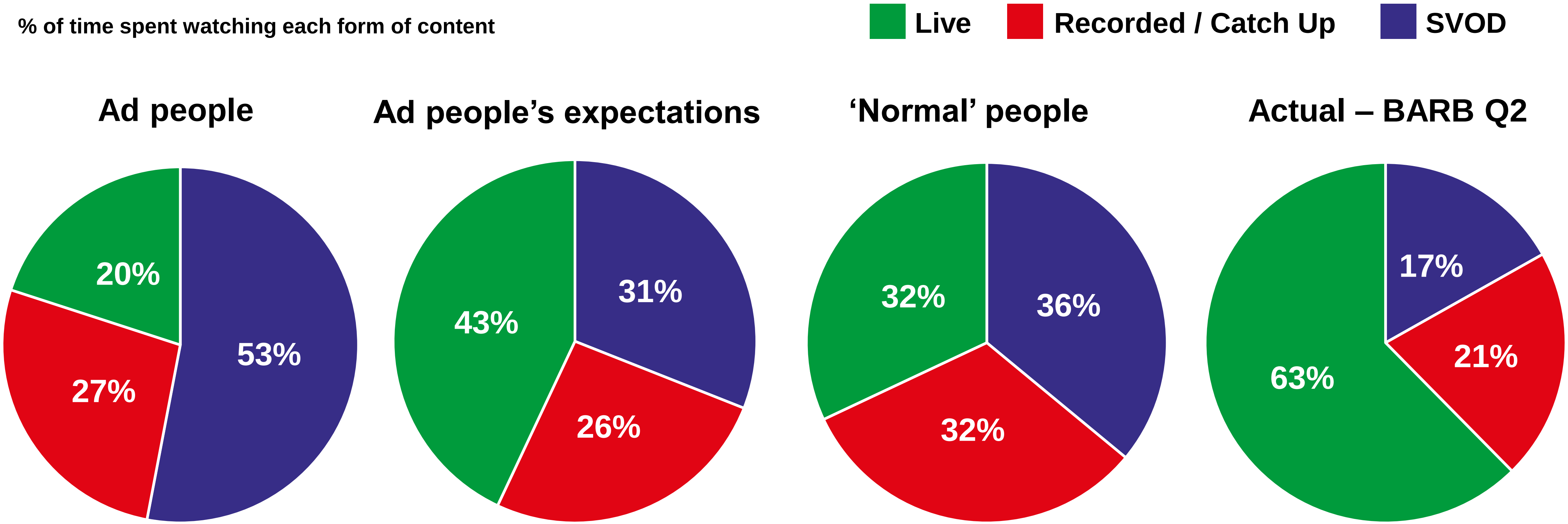
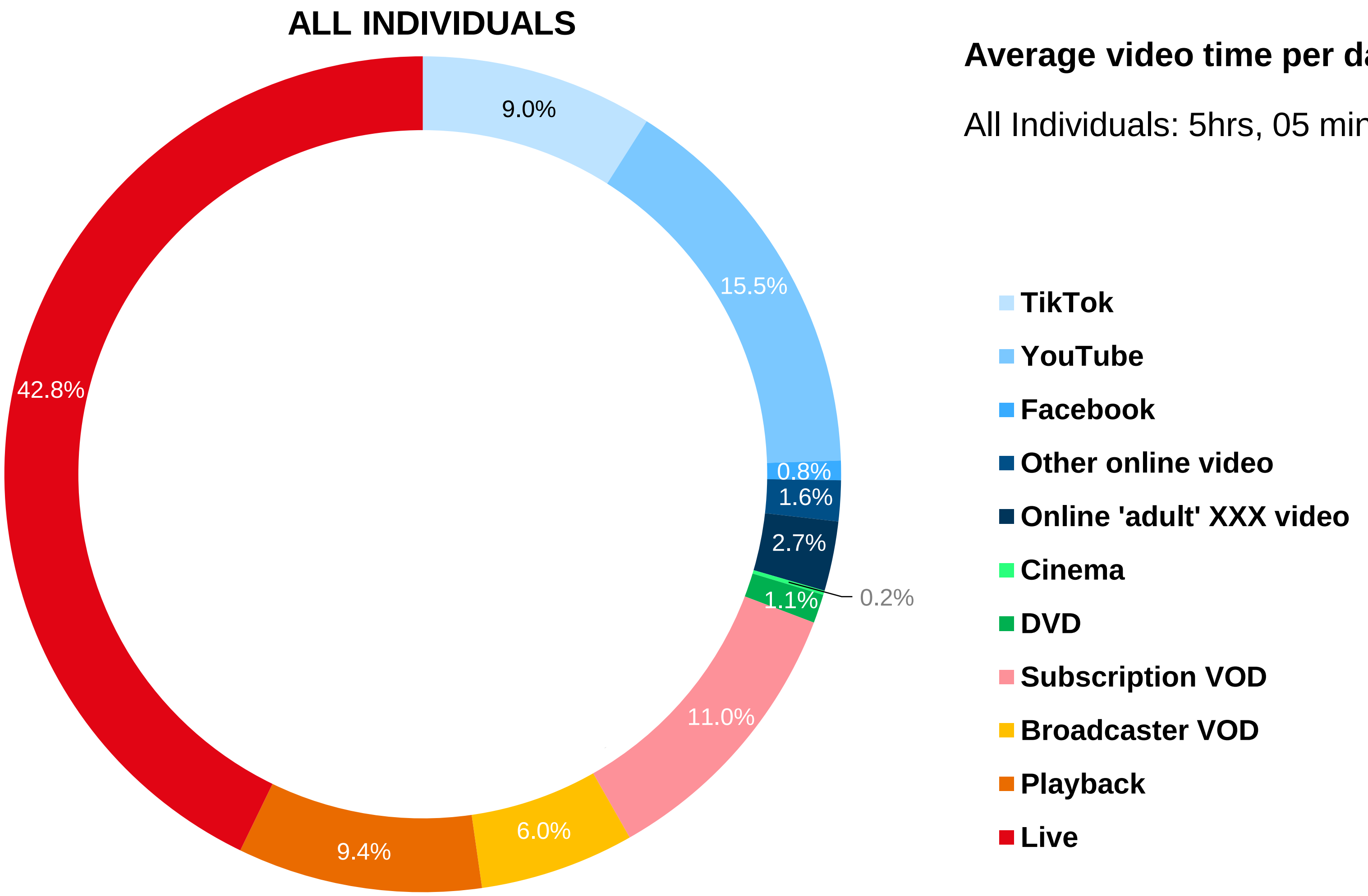
What content do people believe that are watching?

% of time spent watching each form of content



Source: Adnormal Behaviour, 2022, Ipsos / Thinkbox. Q.AN14 / TN14. Of the time you (the British public) spend watching television, what proportion of that time (do you think) is spent watching…
Base: 'normal' people (1,158); Ad people (216). BARB, Q2 2022, Adults 16+, Online Multiple Screens Network – viewing across four screens – TV sets, tablet, PCs and smartphones

BVOD accounts for 6% of all video viewing



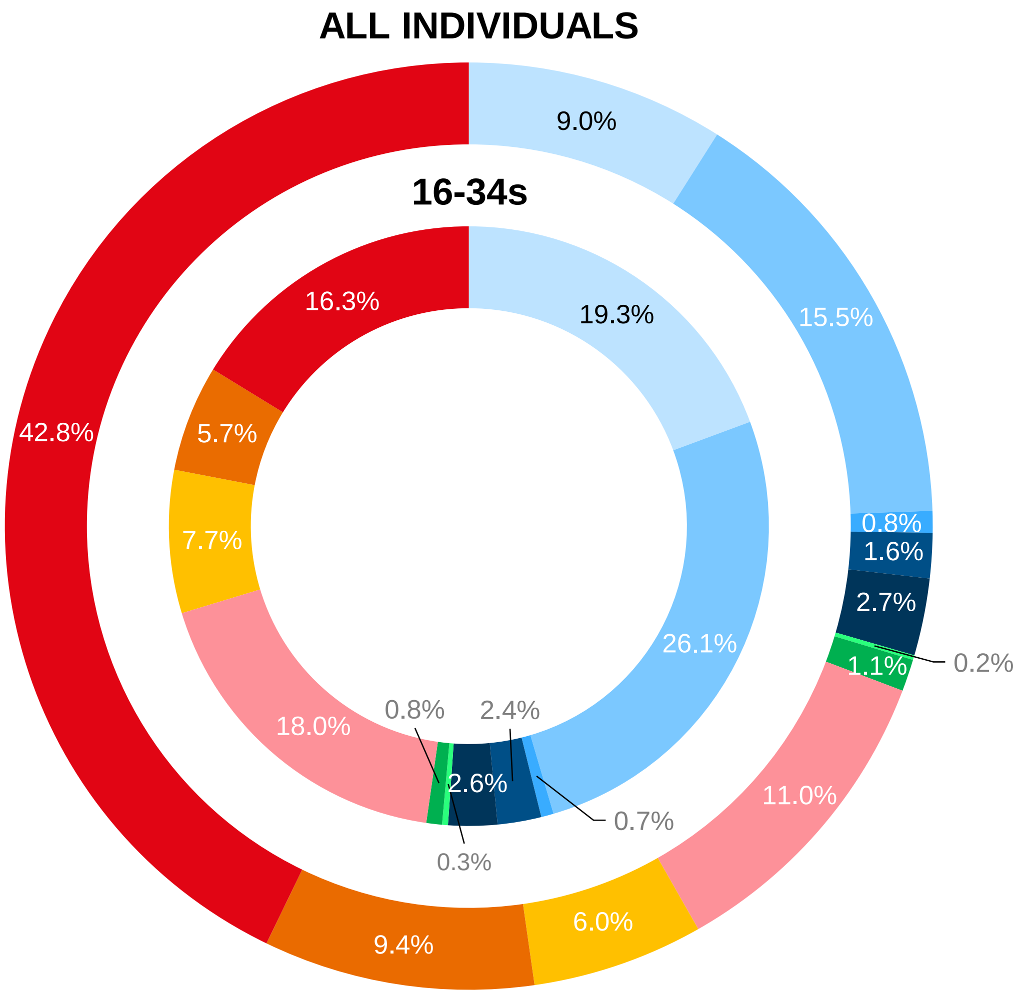
Average video time per day

All Individuals: 5hrs, 05 mins

Source: 2021, BARB / Broadcaster stream data / Comscore / IPA TouchPoints 2021 (wave 1 and 2) / Pornhub / UK Cinema Advertising Association (CAA), Office of National Statistics (ONS)

BVOD accounts for 6% of all video viewing

… and 7.7% of 16-34's video viewing

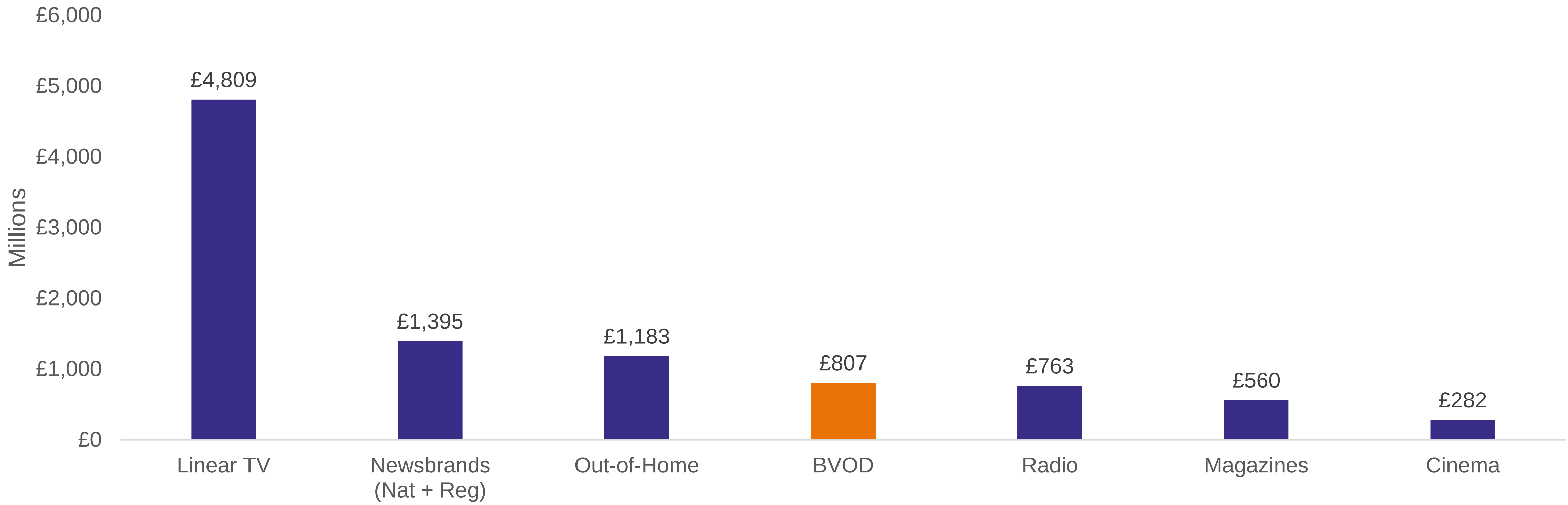


Average video time per day

All Individuals: 5hrs, 05 mins
16-34s: 4hrs, 44 mins

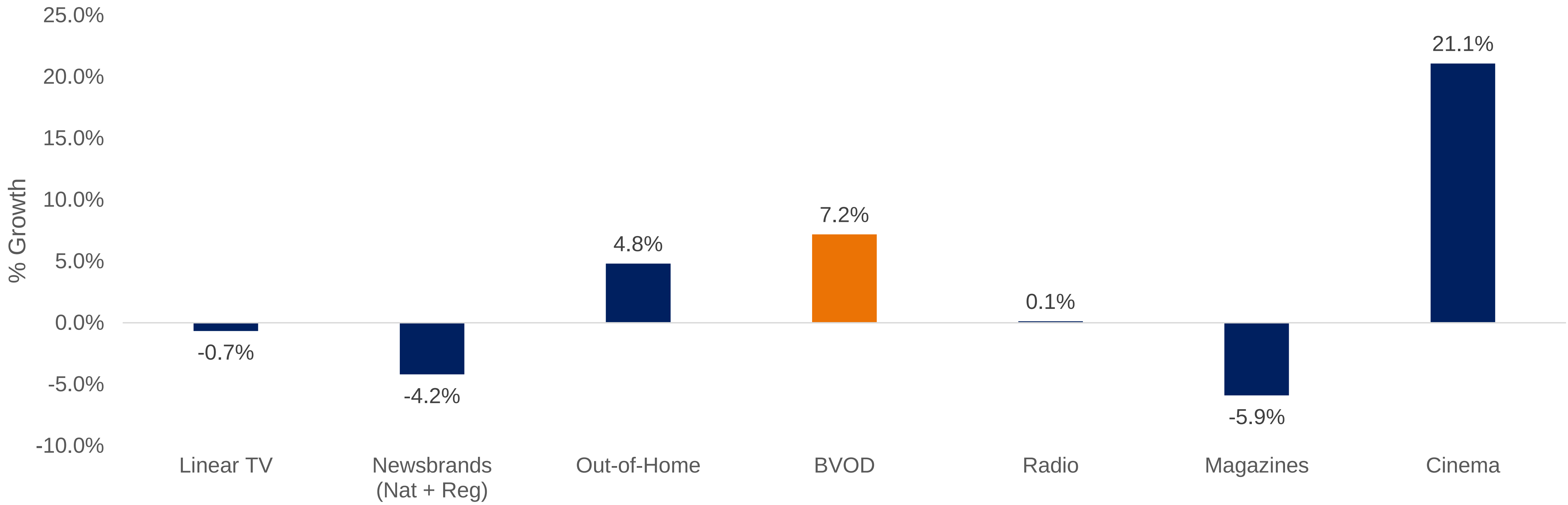
Source: 2021, BARB / Broadcaster stream data / Comscore / IPA TouchPoints 2021 (wave 1 and 2) / Pornhub / UK Cinema Advertising Association (CAA), Office of National Statistics (ONS)

BVOD is already a significant medium in it's own right



Source: AA/WARC Expenditure Report – Forecast for full year 2022 (October 2022)

And predicted to be one of the fastest growing in 2023



Source: AA/WARC Expenditure Report – 2023 growth forecasts (October 2022)

Questions asked of us about BVOD…

Does BVOD viewing following the same patterns as linear TV?

What guidelines do you have for how best to implement BVOD alongside linear TV?

Does BVOD have a role beyond reaching light viewers to help add incremental reach?

Should I plan BVOD in bursts or is it a more ‘always on’ medium?

Do consumers think about BVOD ads differently from the ones they see on video sharing platforms?

With a higher CPT than linear for most audiences, how can I be sure BVOD delivers an ROI?

BVOD Almighty: Reach and Return

Econometric analysis of £1.1 billion of advertising expenditure in video channels

What ROI does BVOD deliver?

Advanced data science evaluation of 1,259 campaigns using BVOD measured by CFlight

What variables impact total campaign reach?

Ethnographic and videographic study of video ad experience in 30 households

What impact do device, platform, environment and creative have on advertising engagement?

Return on demand

Jane Christian, Head of Systems Intelligence
MediaCom

Dom Charles, Head of Effectiveness
Wavemaker

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Broadcaster VOD: Return on Demand

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GAIN THEORY

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MINDSHARE

In 2019, we built the ultimate effectiveness databank

In 2022, we updated it to see what's changed

52 Brands

14 Categories*

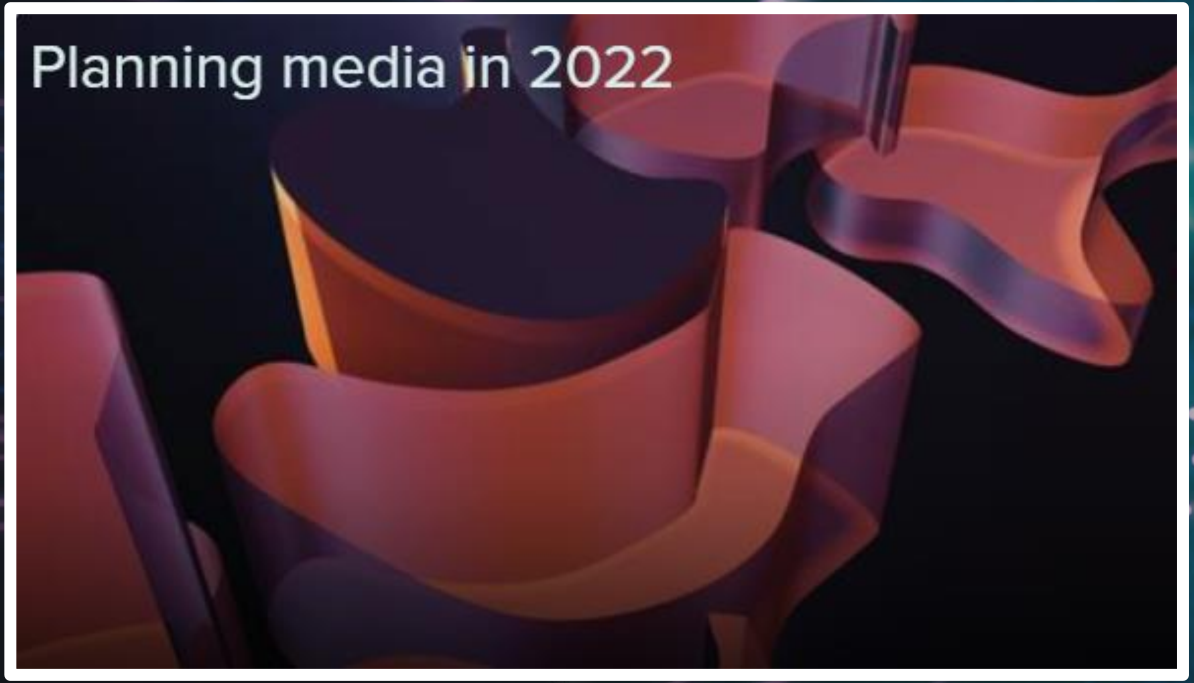
Breadth of budget levels & product types

10 Media Channels

£2.2bn Spend (2018-2021)

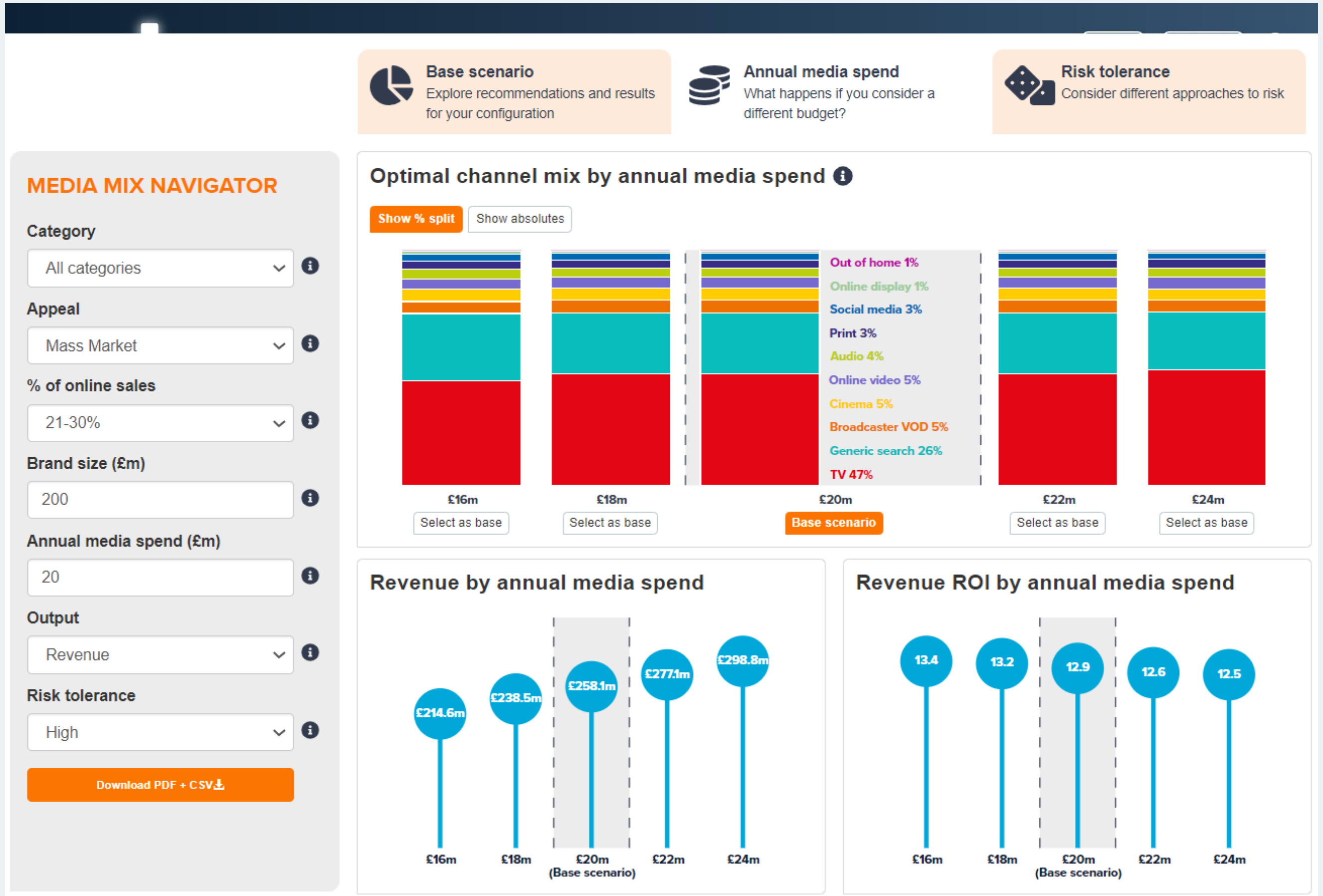
*7 reported individually

Our previous studies have focused on the learnings from the databank about what influences the most effective media mix



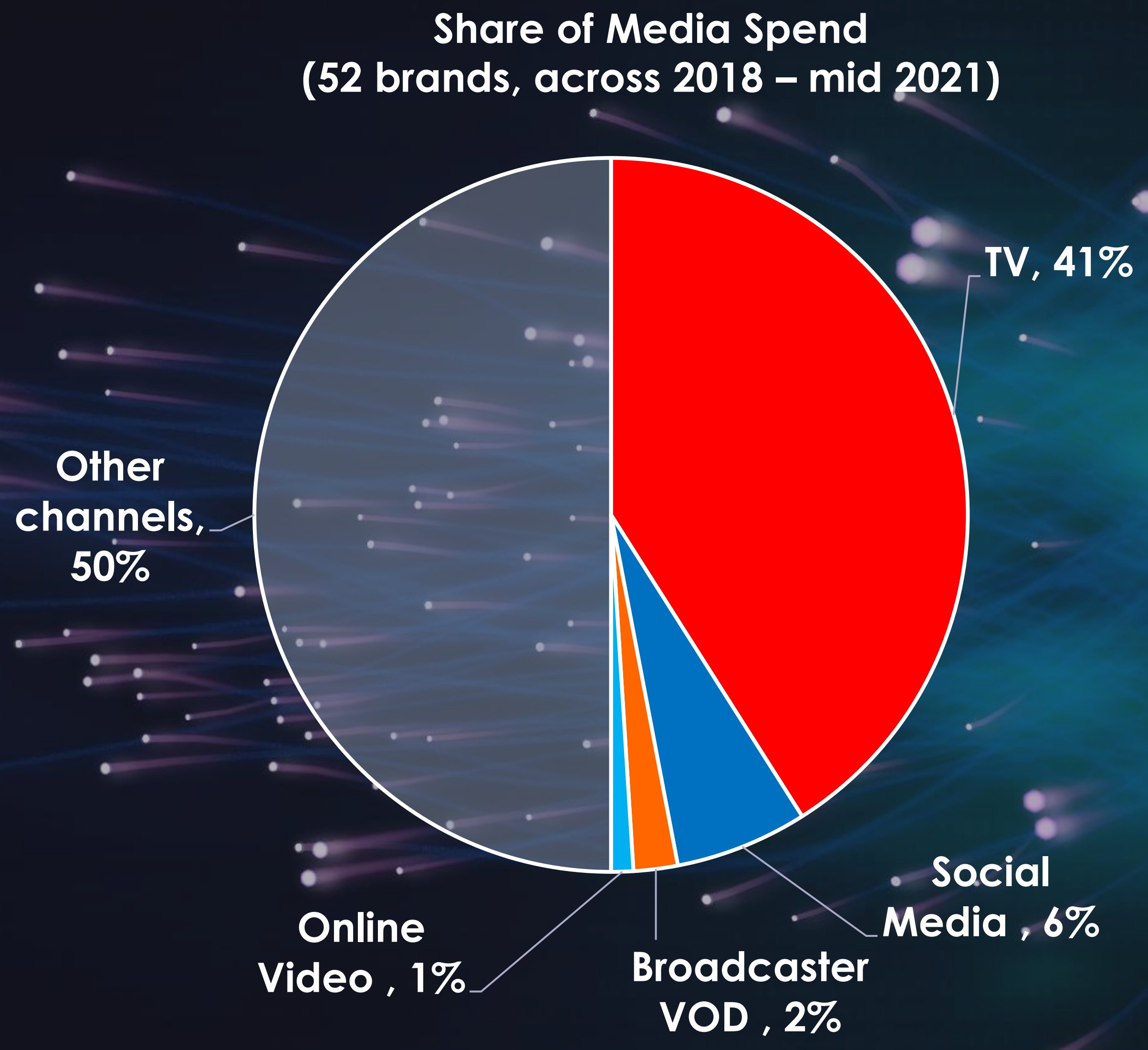
Demand Generation 2019: https://www.thinkbox.tv/research/thinkbox-research/demand-generation/
Planning Media in 2022: https://www.thinkbox.tv/news-and-opinion/events/planning-media-in-2022/

And we developed the *Media Mix Navigator* so you can work out the optimal media mix for your brand



https://www.thinkbox.tv/research/media-mix-navigator/

Today is all about video, accounting for £1.1bn in the databank



Four key take-outs for video in the latest data

1. Even at low spends, a diversified approach to video maximises ROI
2. The optimal video mix will vary brand to brand based on sector, nature of product & online sales percentage
3. Predictability of payback varies across the video channels. Attitude to risk has a bearing on optimal mix & potential ROI
4. Sustained long-term effects make up the majority of the payback for most forms of video

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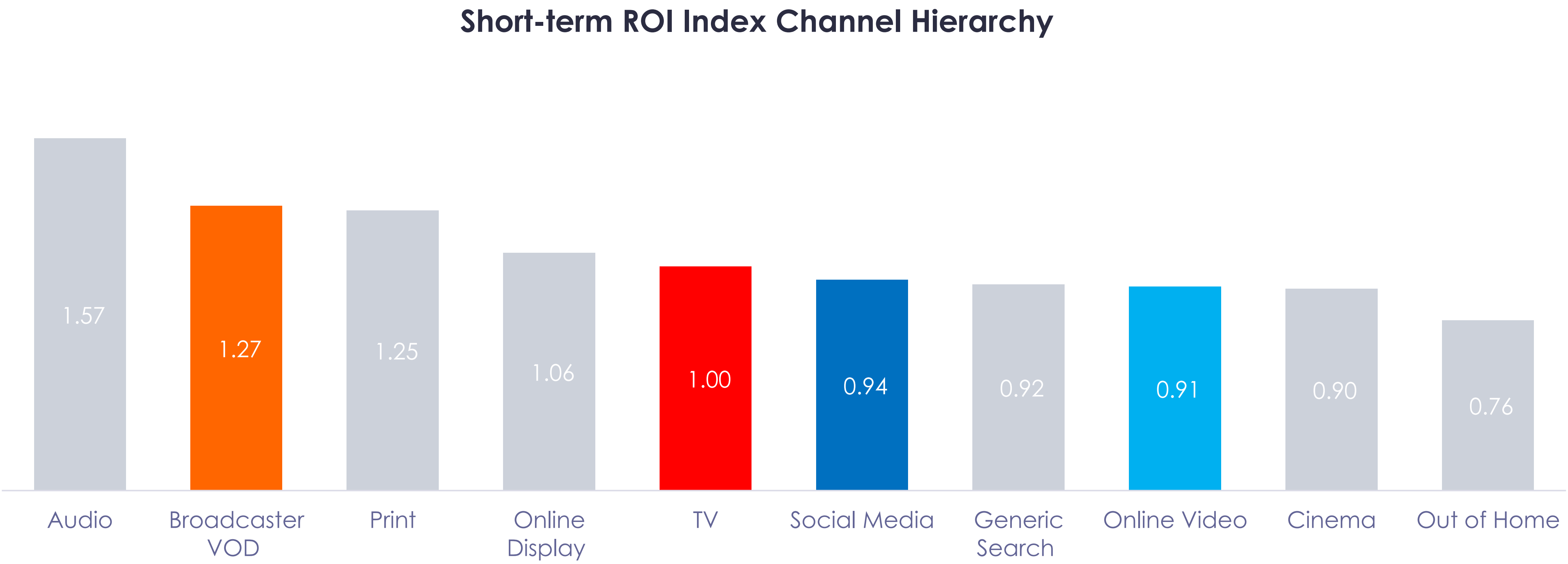
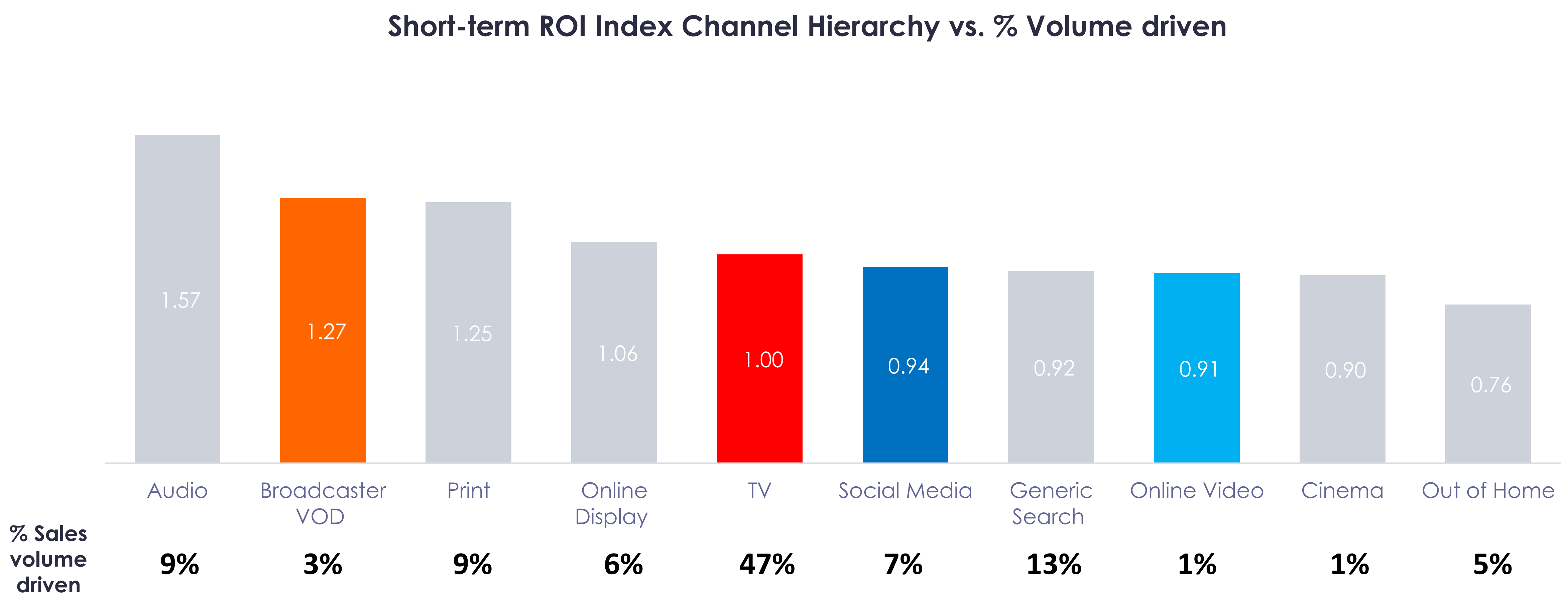
Broadcaster VOD is the most efficient video driver of short-term sales effects



Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

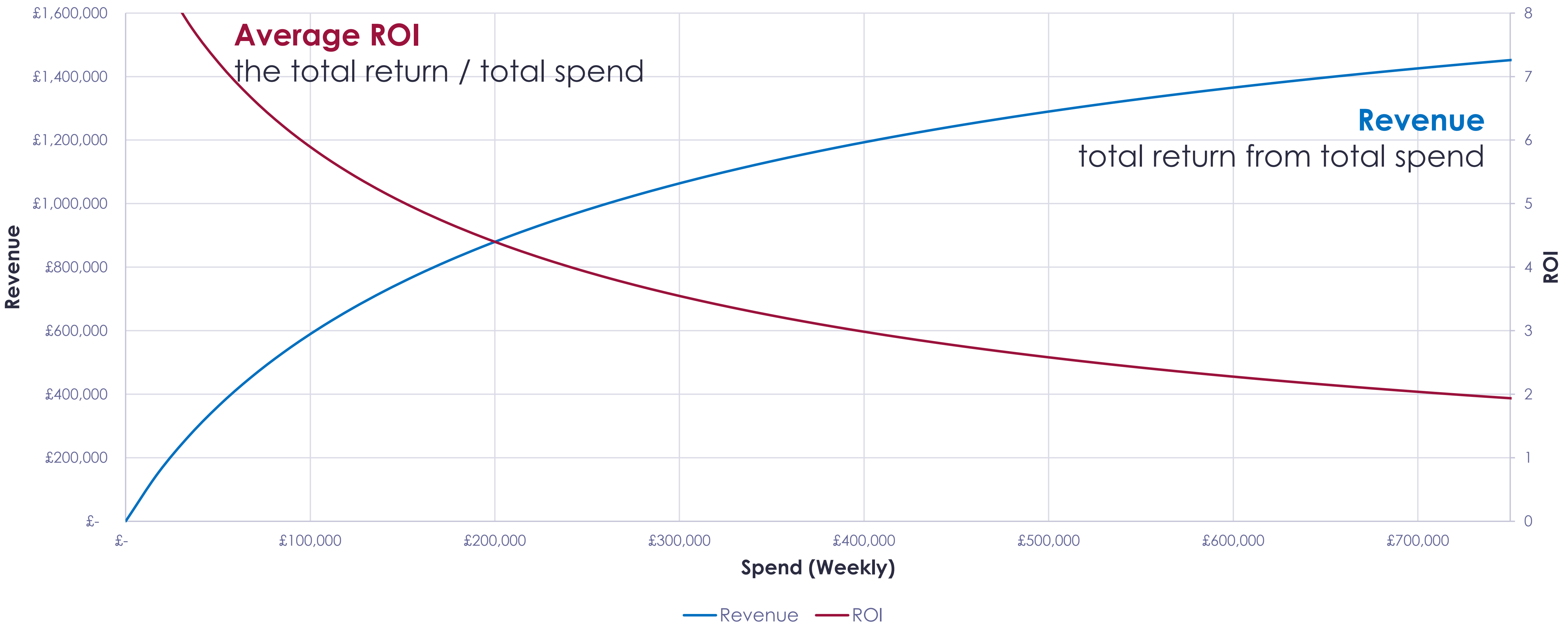
However Linear TV remains unmatched in terms of its ability to drive cost-effective sales volume



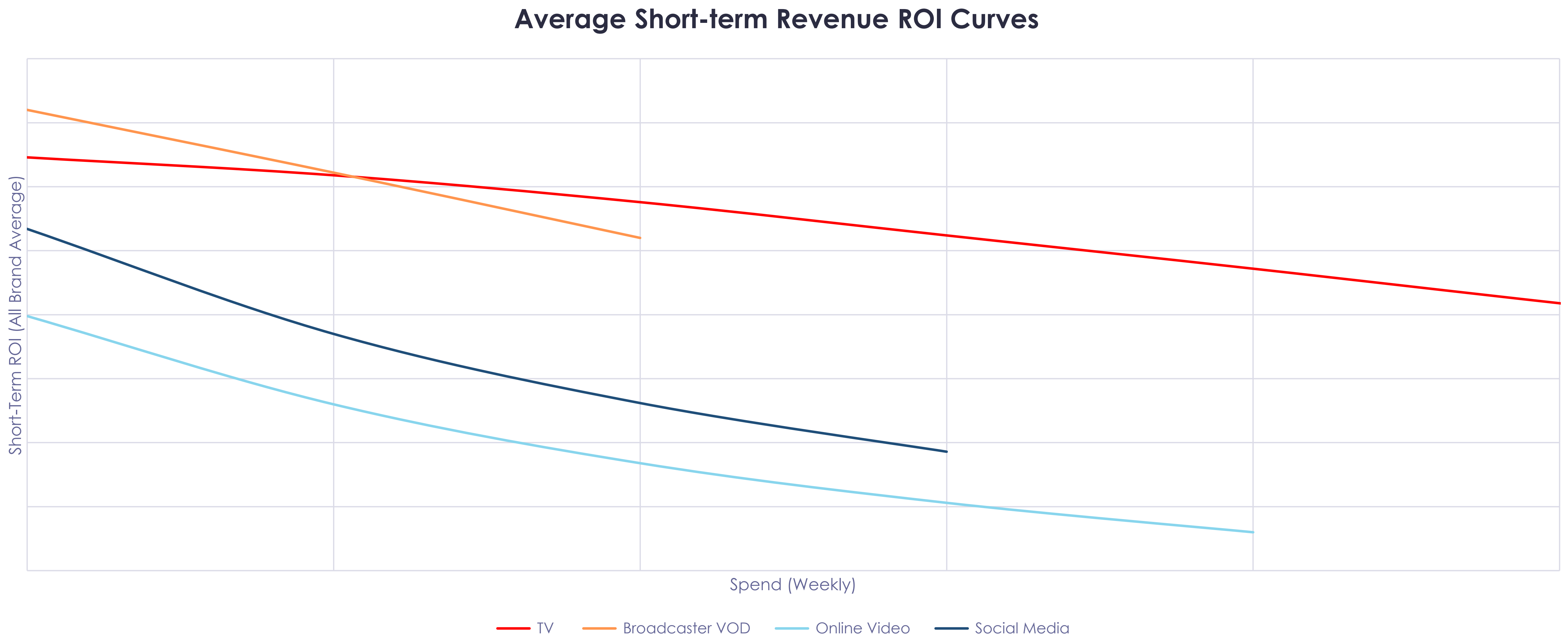
Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

"Couldn't we just spend more in BVOD & get the same sales as TV at a higher ROI?"

In short, no – all channels experience diminishing returns – the more we spend, the less efficient we get

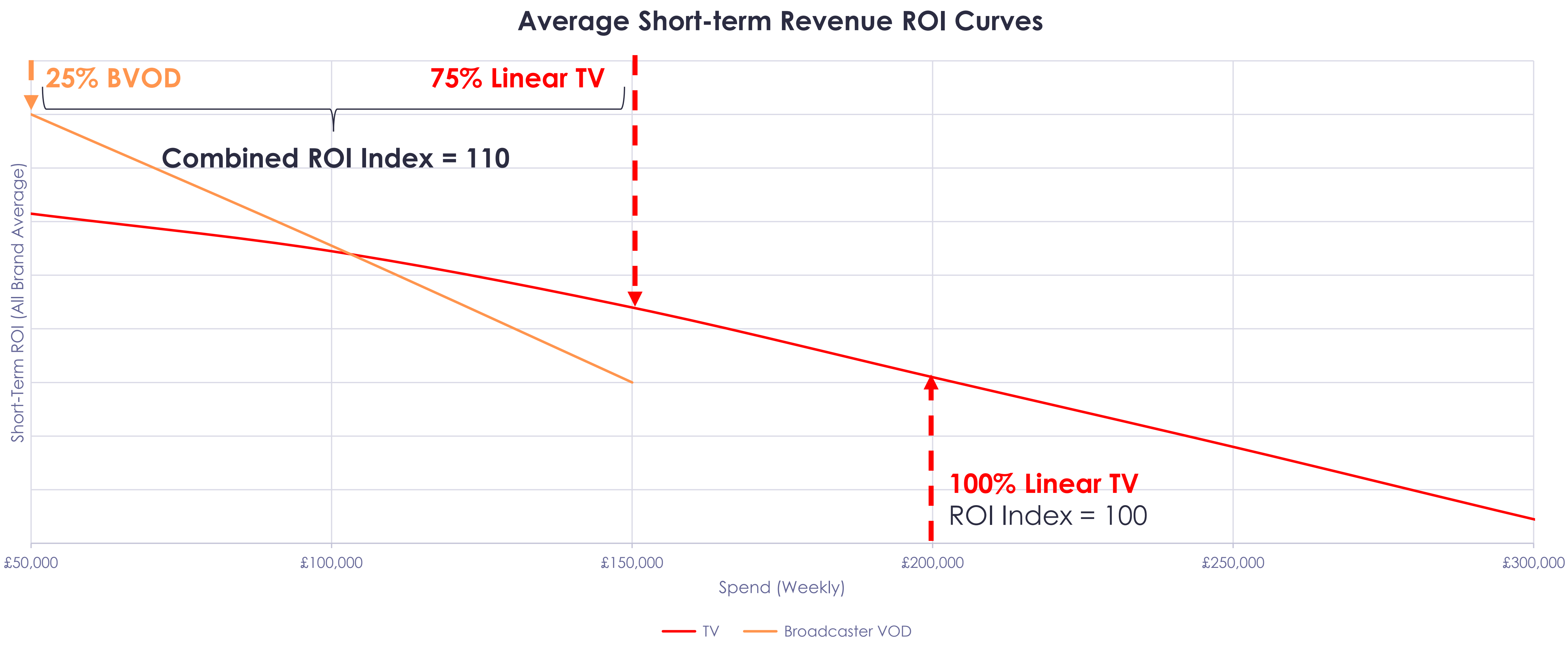


And these diminishing returns happen at different rates in different channels



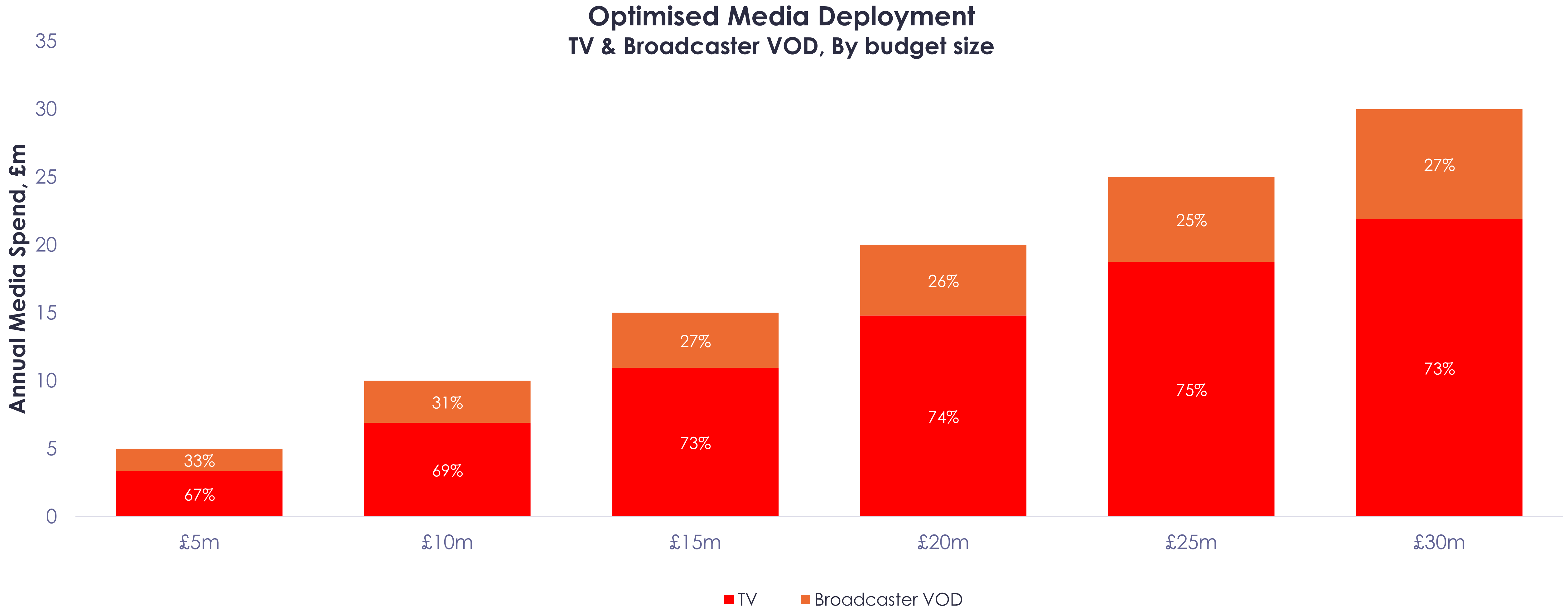
Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

A combination of BVOD and TV generates up to a 10% higher ROI than TV alone



Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

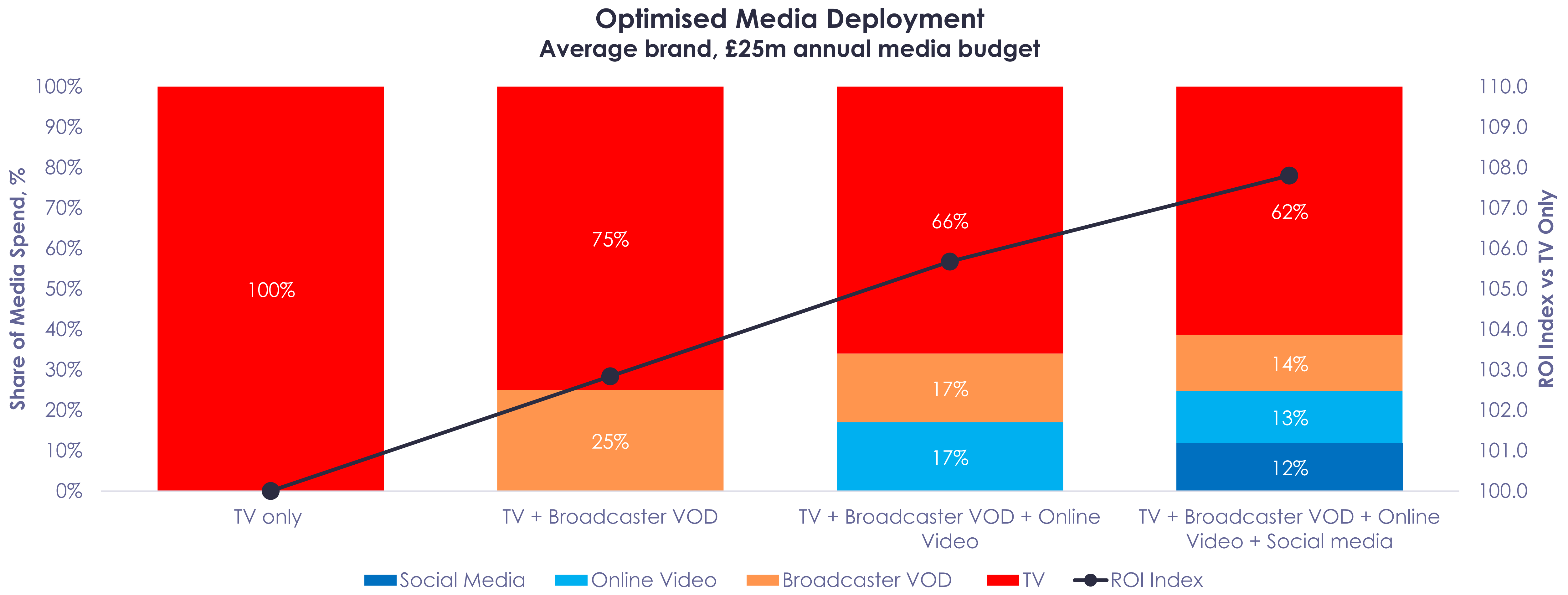
And so the optimal mix varies with spend – share of BVOD is the highest at lower budget levels



Note: These scenarios are based on a Mass Market brand, with 11-20% Online Sales, £500m brand size, high risk tolerance and across all categories.

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Generally, the more video channels we execute the higher the ROI



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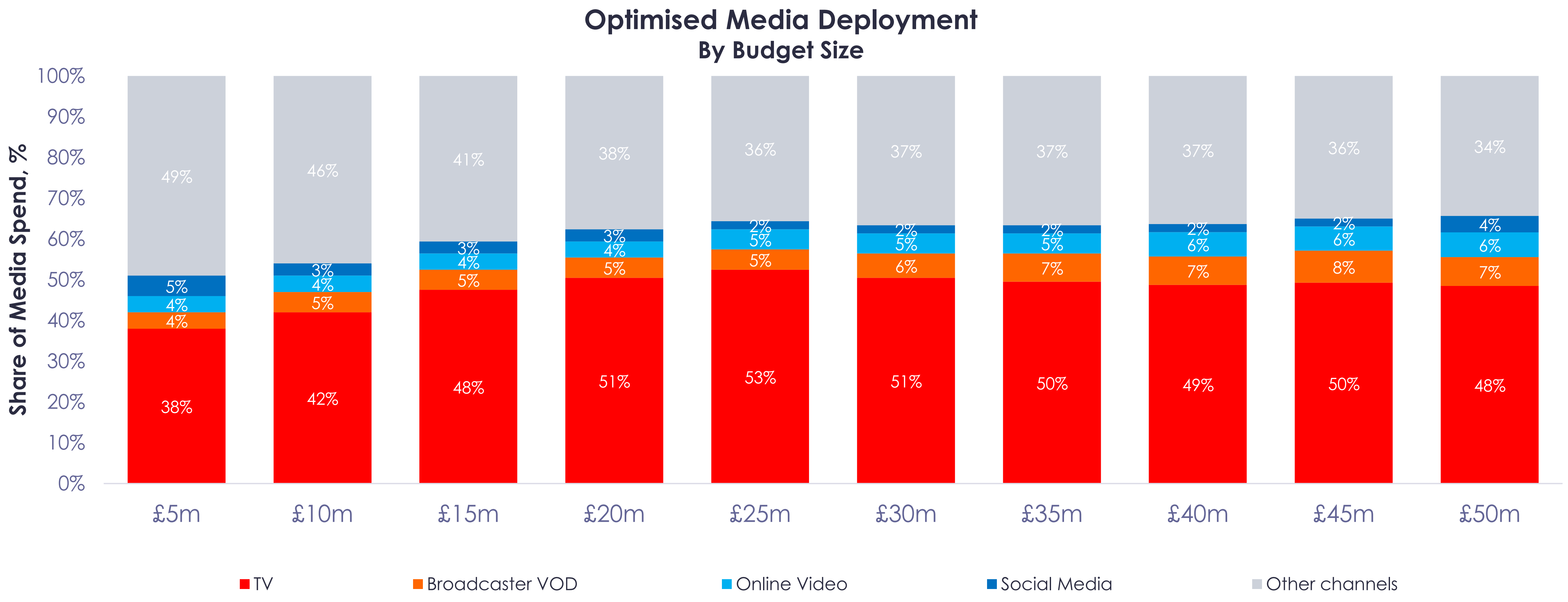
Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

However, we also need to consider the optimal video mix in the context of all media spends



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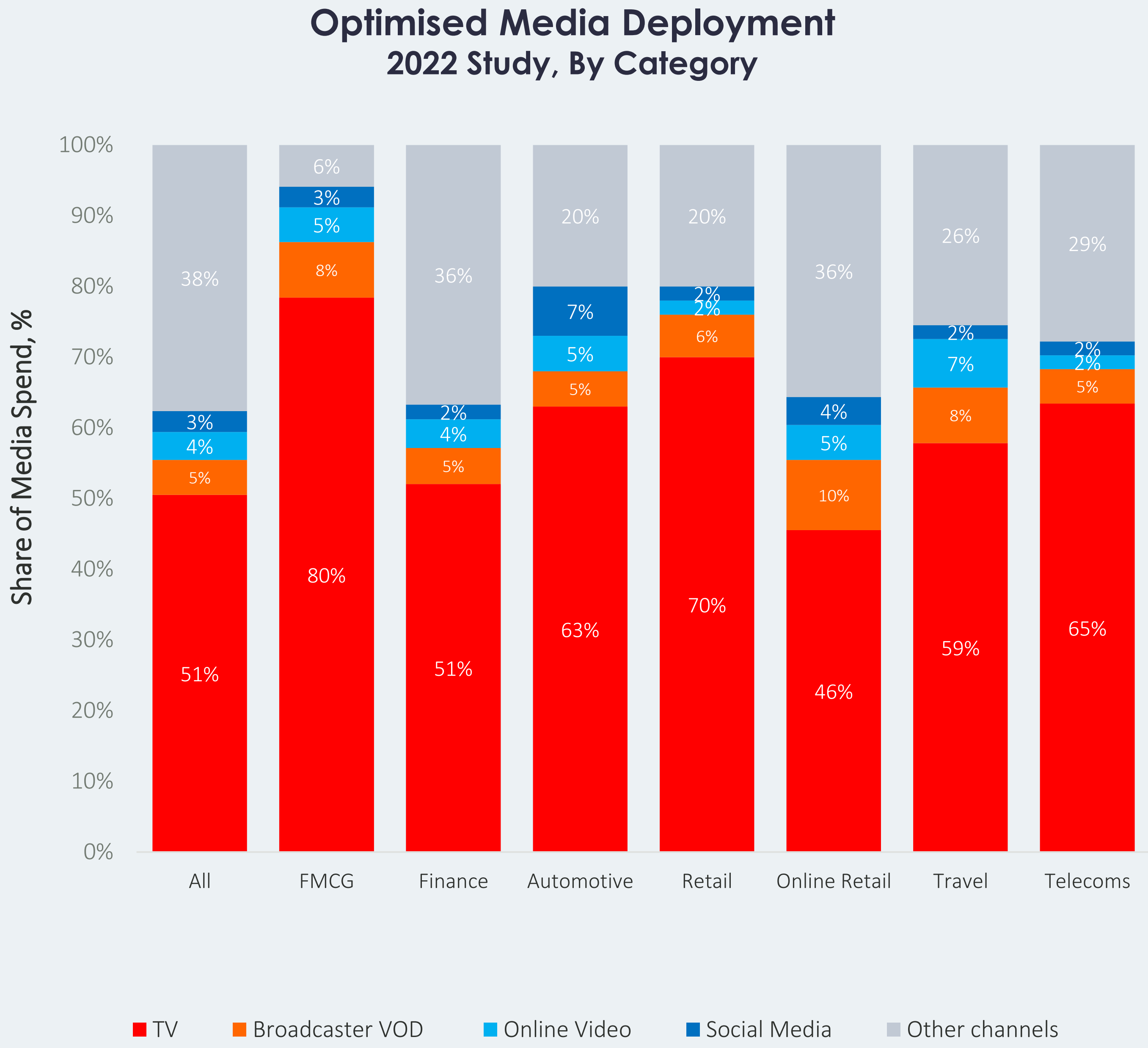
4 Sustained long-term effects make up the majority of the payback for most forms of video

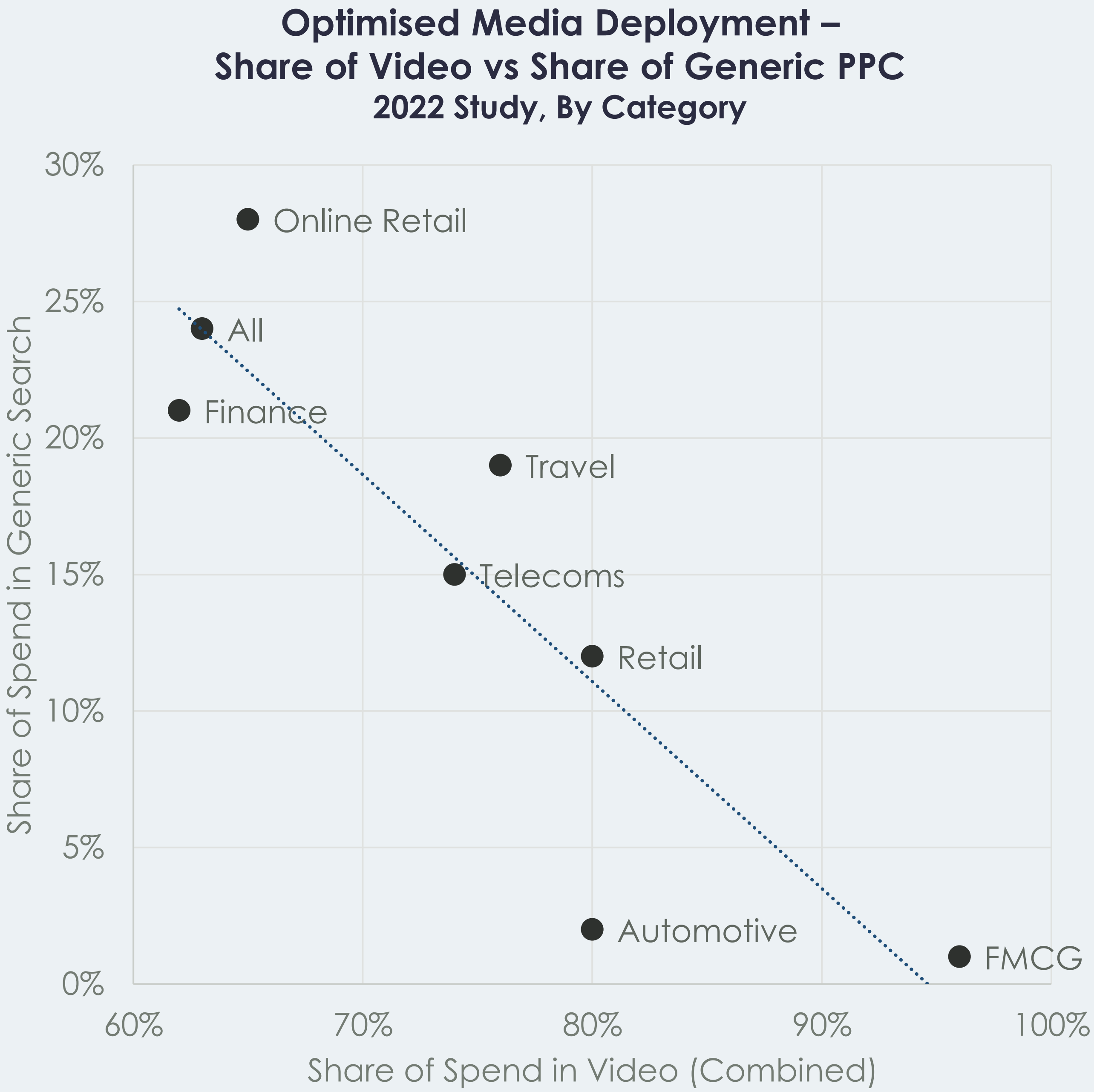
Share of total spend into video varies greatly by sector – highest in FCMG, lowest in Finance



Channels with sufficient sector level benchmarks only. Based on £500m brand size (£300m for FMCG), 10-20% online sales high risk tolerance and media budget of £20m.

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Video’s share is generally linked to how much scale is available in Generic Search



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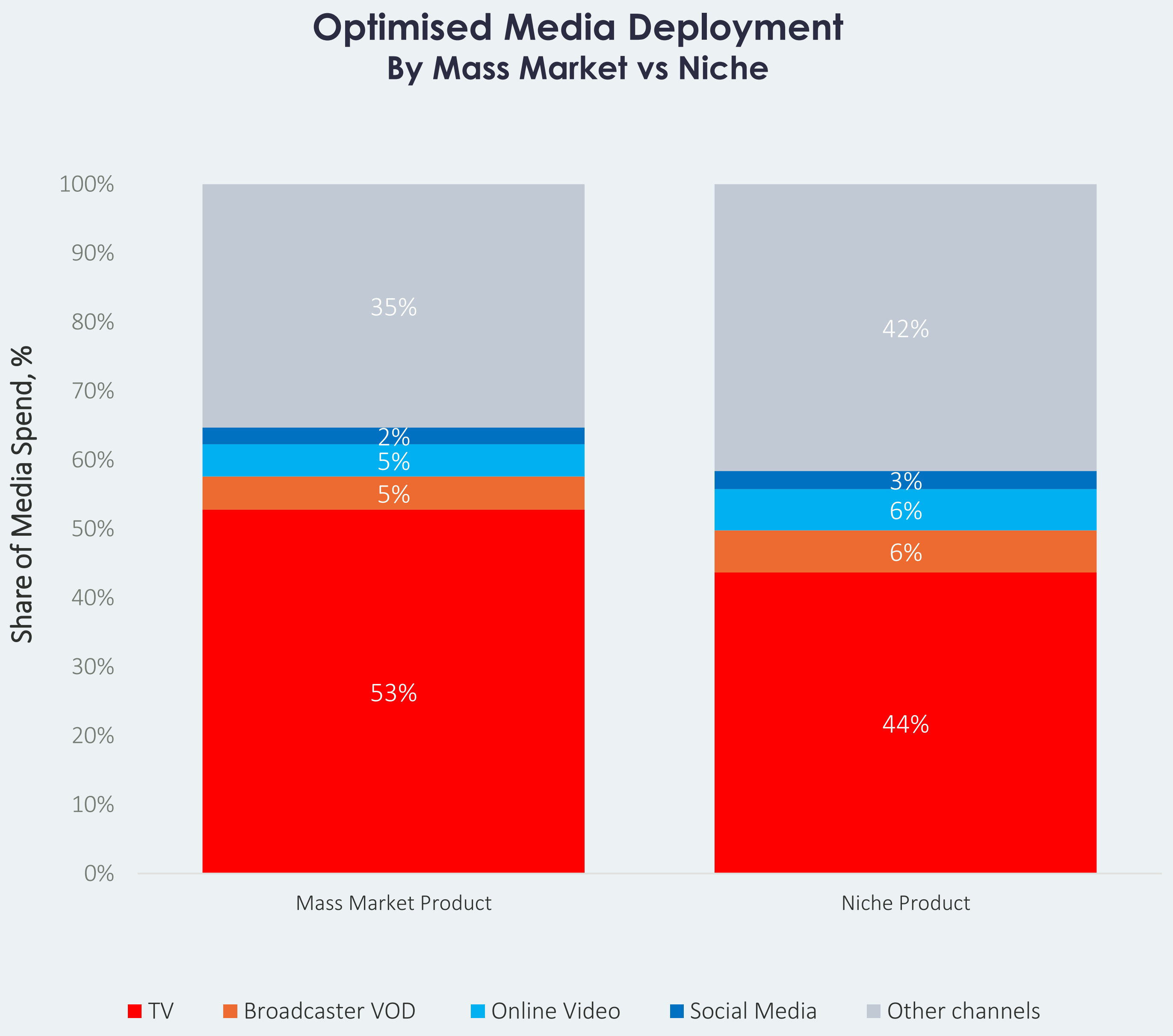
Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

More niche products benefit from a higher share of addressable forms of video



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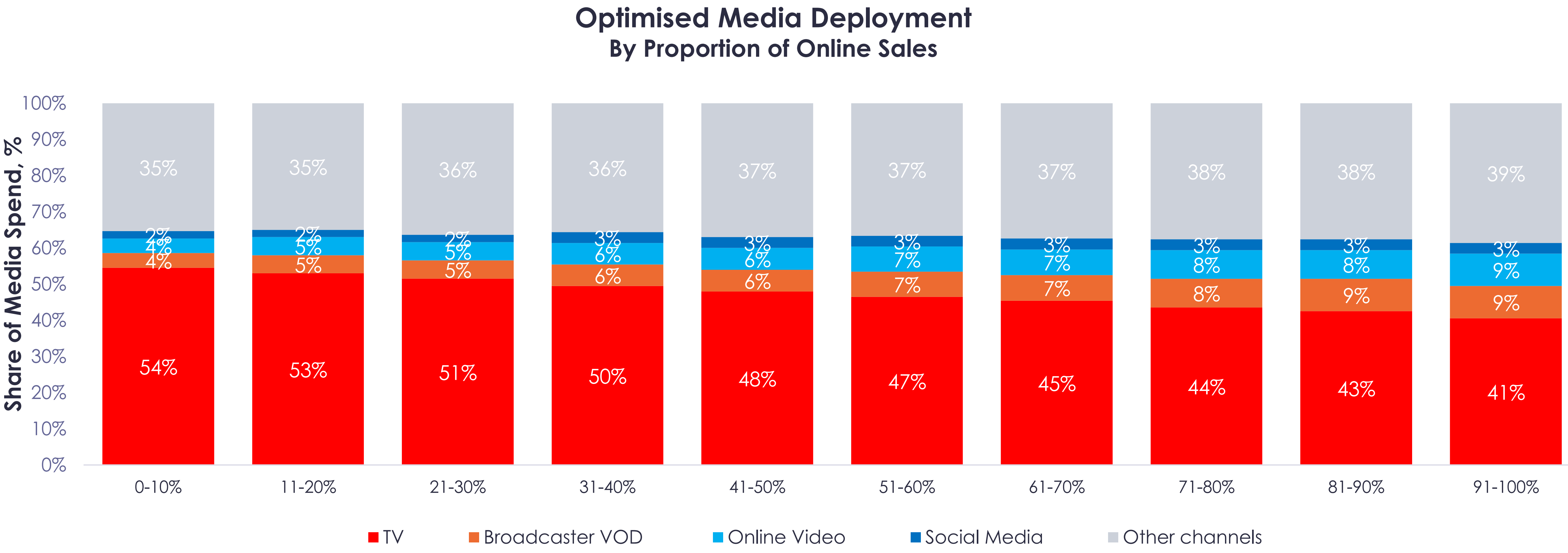
The more of your sales that are online, the more headroom in BVOD & Online Video



Note: These scenarios are based on a Mass Market brand, with 11-20% Online Sales, £500m brand size, high risk tolerance and across all categories.

With two main factors driving this effect

1. Audience synergies between those who buy online & those who consume video online

2. Availability of first party data signals to inform targeting decisions

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

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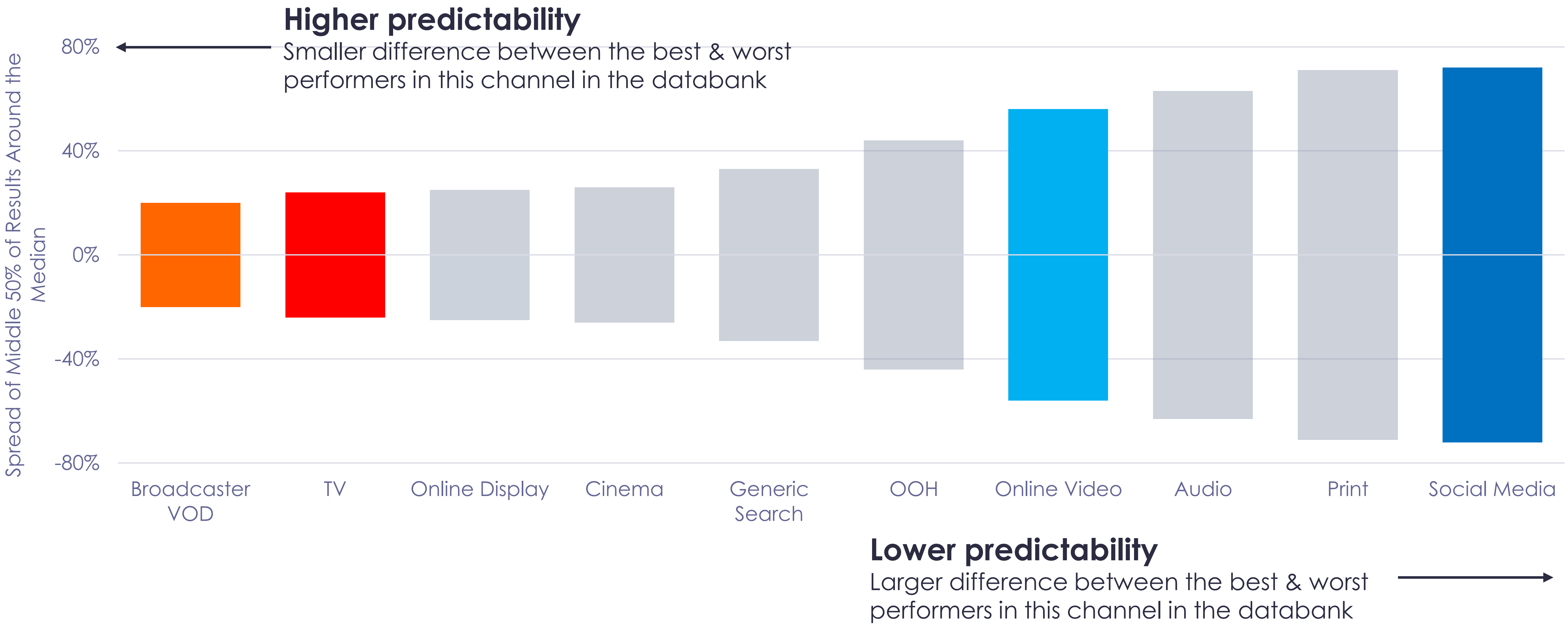
Different video channels sit at different ends of the predictability spectrum



Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

PRIORITISE CERTAINTY

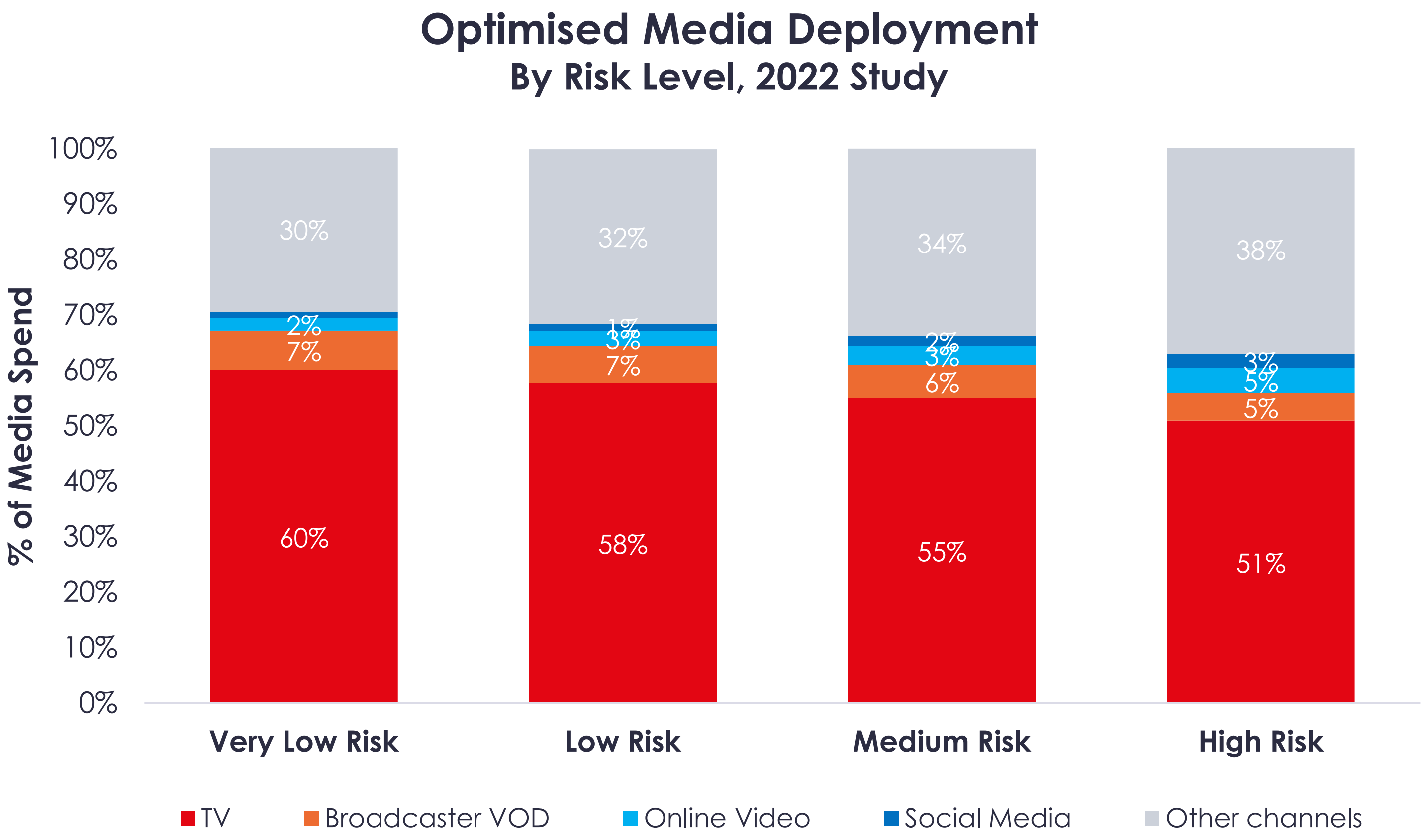
Focus a higher proportion of investment into channels with more **consistent performance** across all brands

PRIORITISE OPPORTUNITY

Focus a higher proportion of investment into channels with **highest potential returns** albeit increasing the risk of something not working for this brand

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

The higher your risk appetite, the lower the share of spend into video – particularly TV & BVOD



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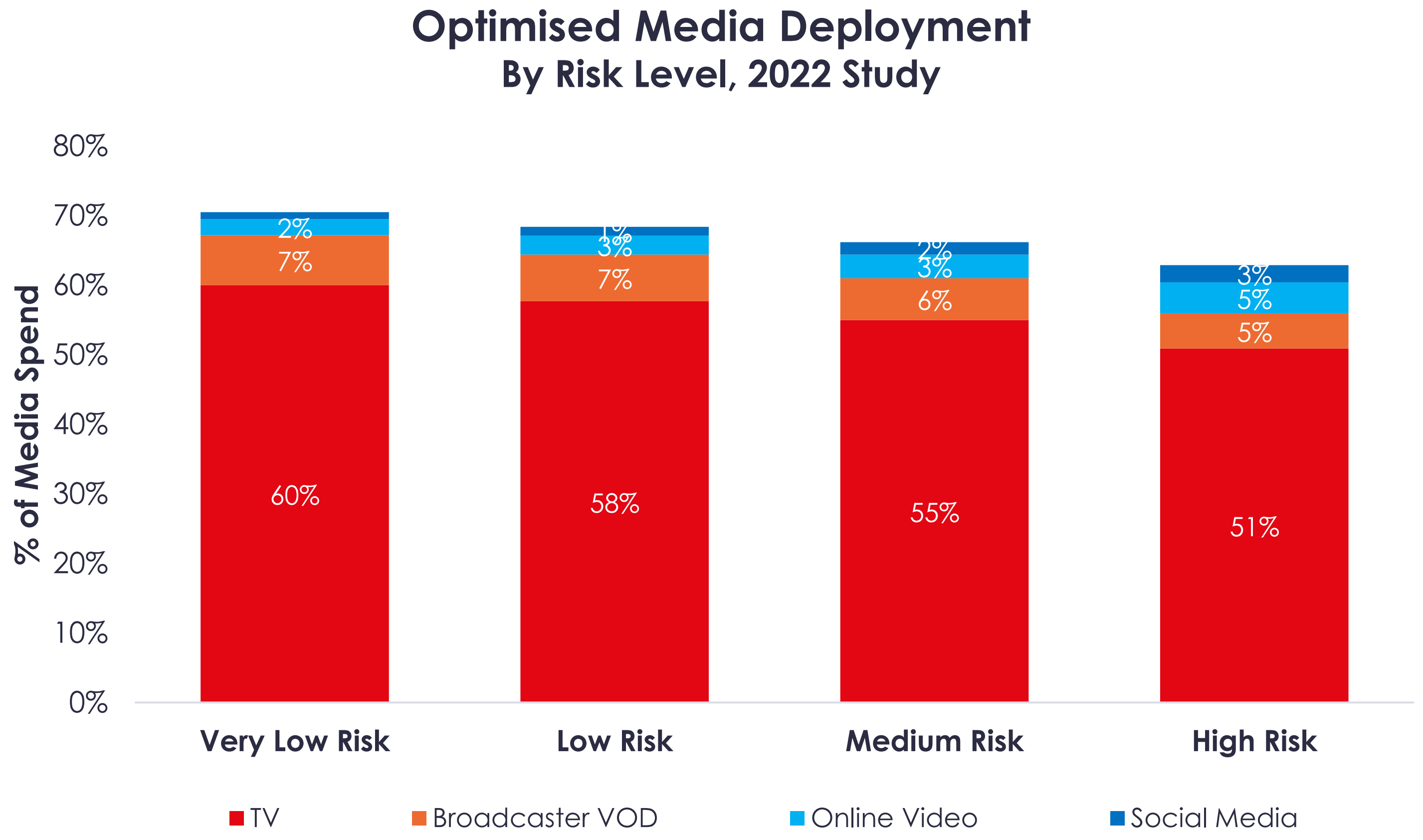

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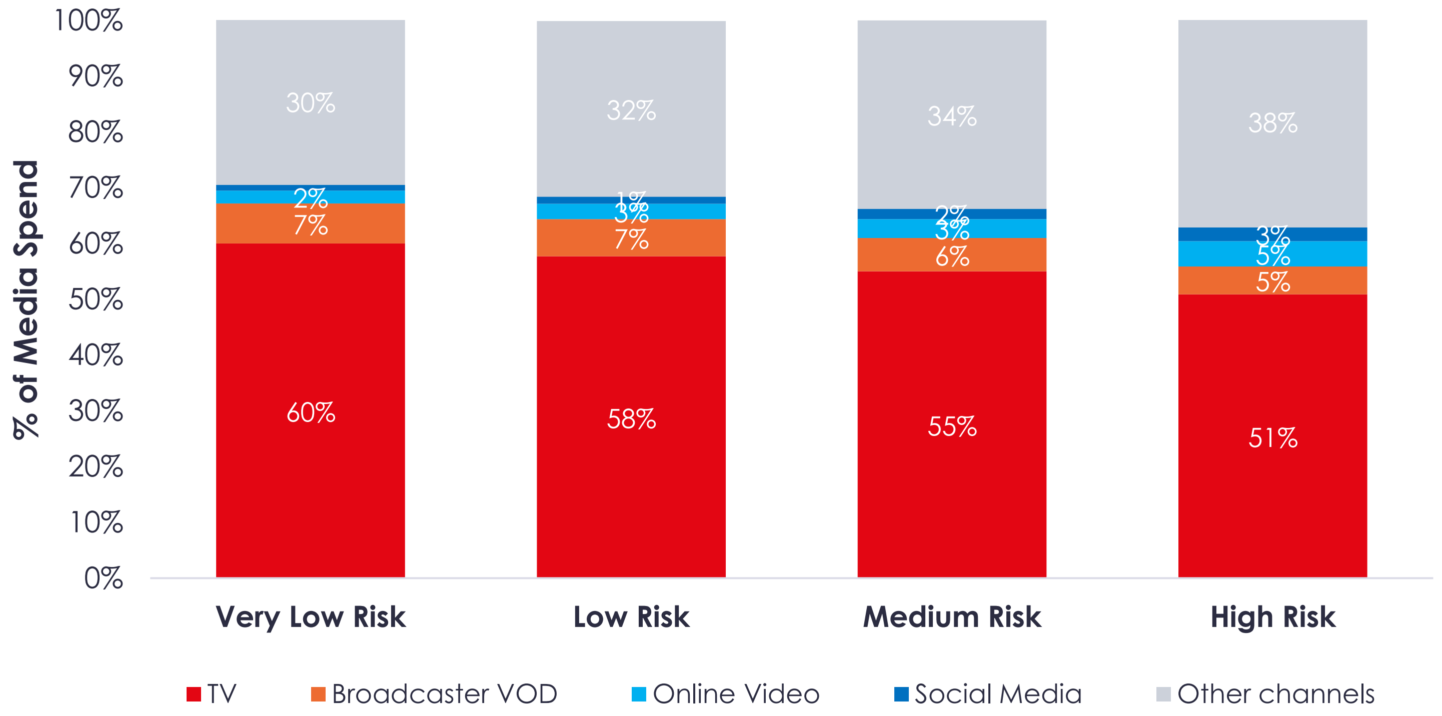
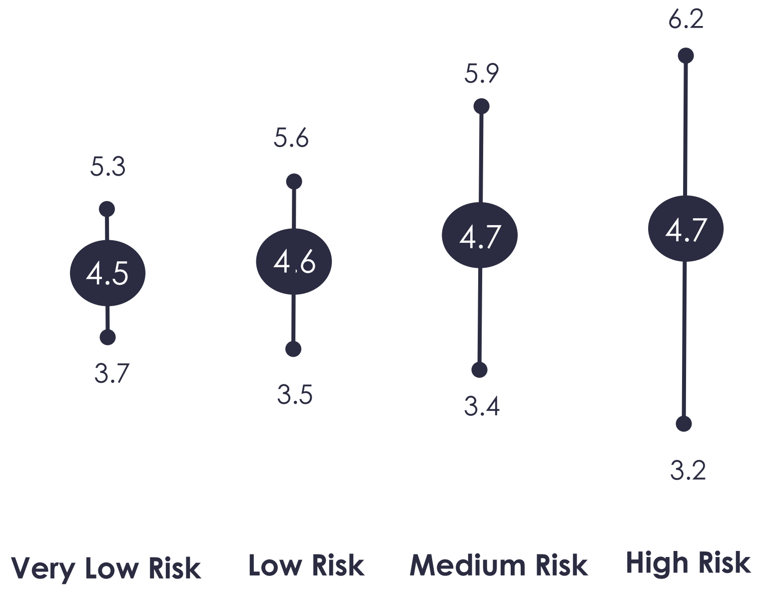
Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

With higher risk having greater potential upside (and downside)

Optimised Media Deployment
By Risk Level, 2022 Study



Profit ROI and confidence interval
By Risk Level, 2022 Study



Note: These scenarios are based on a Mass Market brand, with 11-20% Online Sales, £500m brand size, high risk tolerance and across all categories.

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

Five factors to consider when thinking about your attitude to risk

1. Health of the business overall (particularly post Covid)

2. Supply chain constraints

3. Demand pool changes (inc cost of living impacts)

4. ROI headroom in predictable channels

5. Competitor set & market

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

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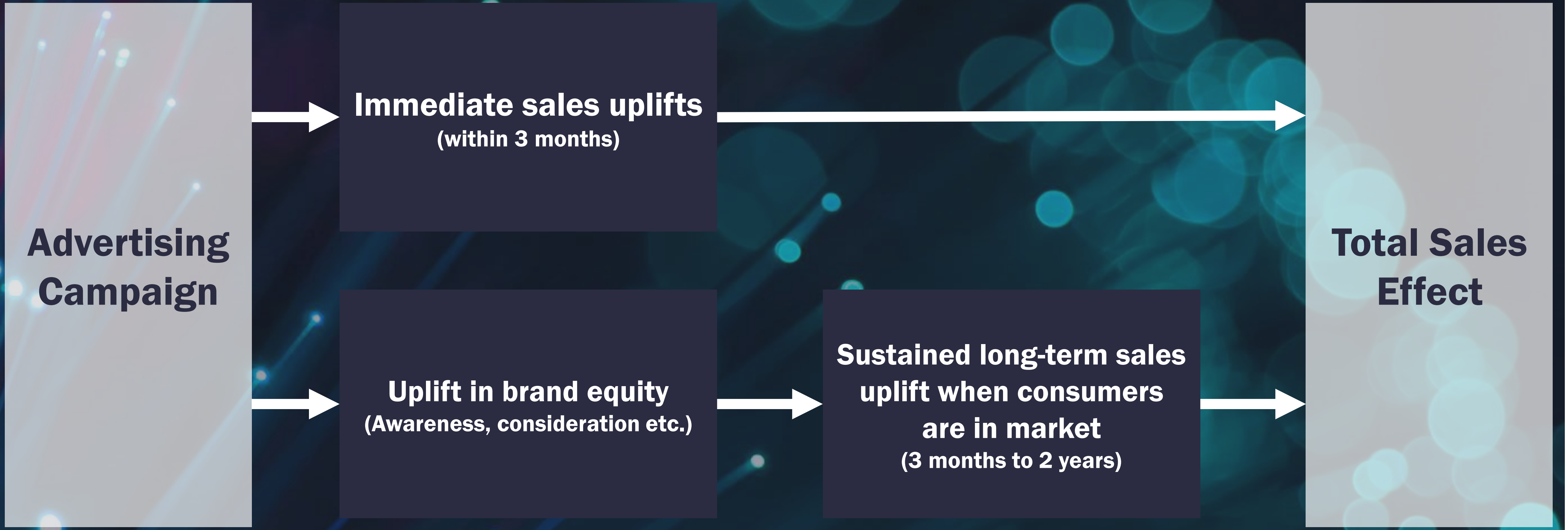
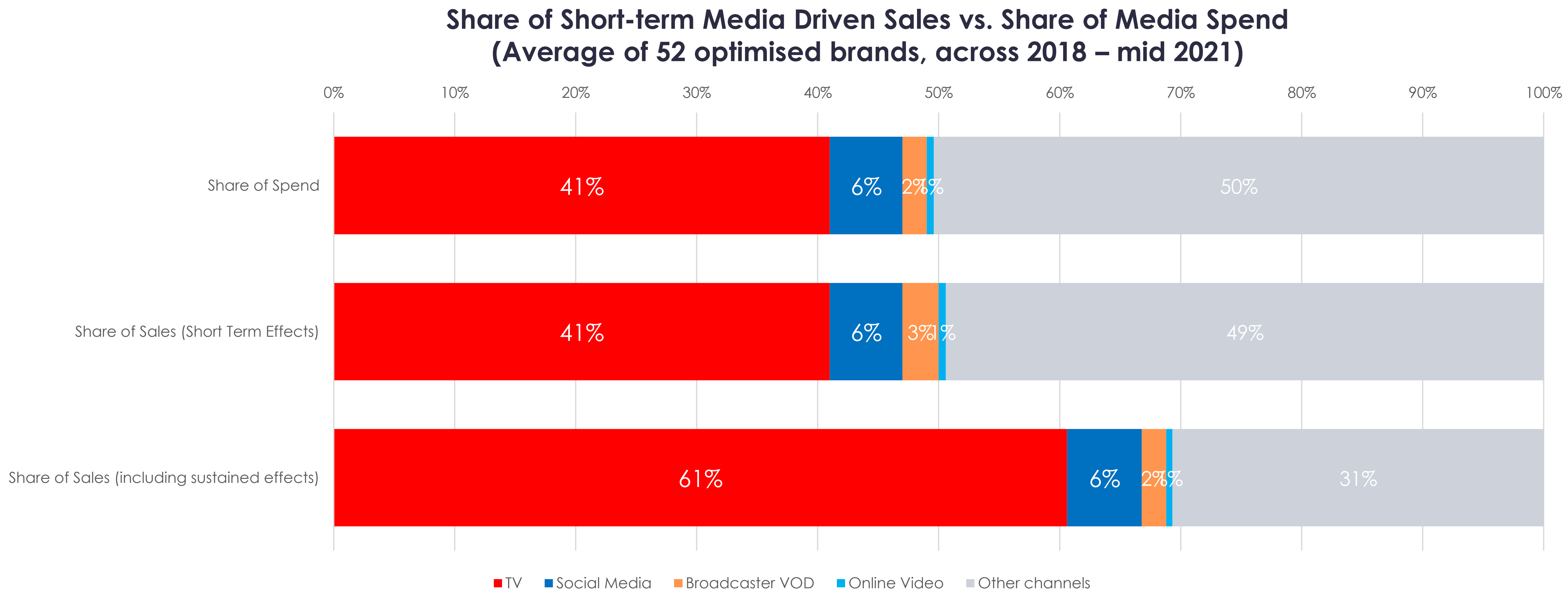
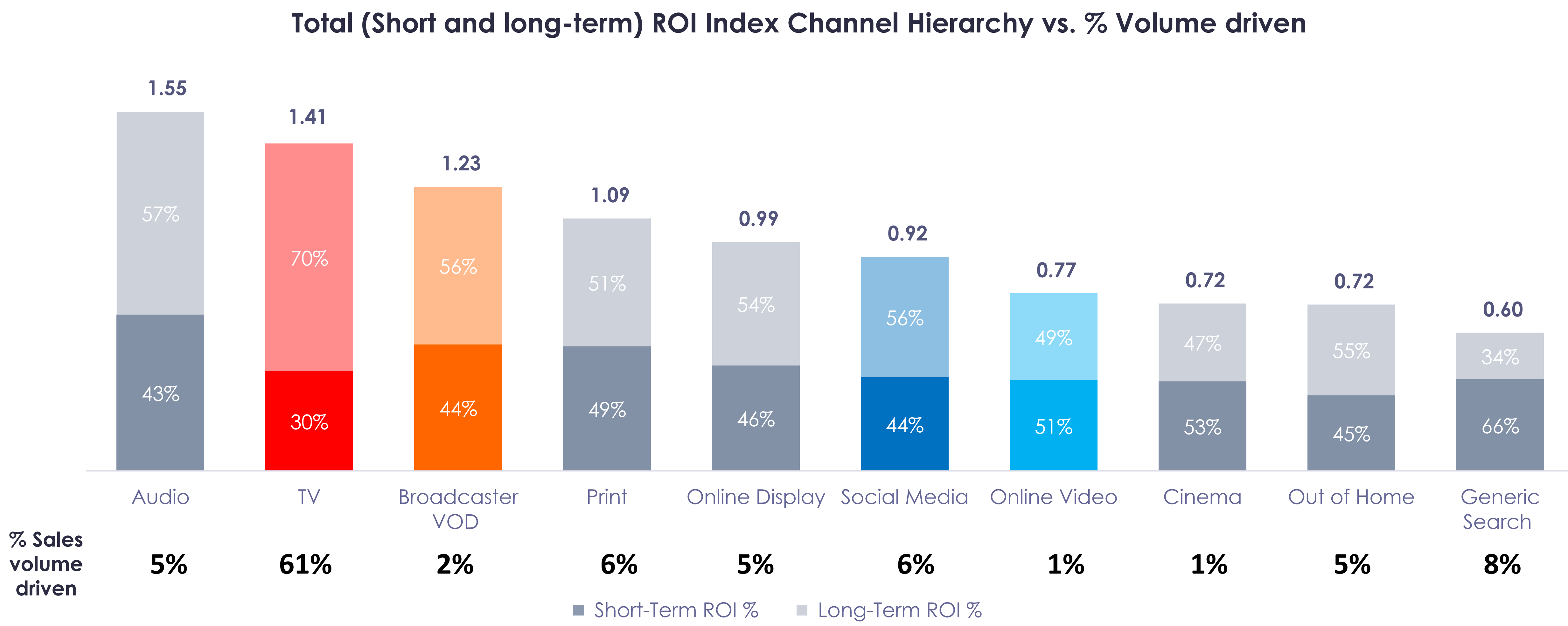
All advertising creates business value at two speeds



Including sustained effects reveals the true contribution of advertising



With, generally, over 50% of video's effect coming in the long-term – TV over-indexes for long-term effects



The timeframe we need payback over will influence video choices

If payback is needed in a short horizon BVOD will take up a higher percentage

If we're interested in total payback (short & long term) a higher share of TV is optimal

No matter when payback is required it is optimal to use a mix of video channels

Source: Media Mix Navigator, Sep 2022, MediaCom/Wavemaker/MindShare/Gain Theory

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Thank You

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Planning for reach

Sam Tomlinson, PwC Partner
UK Media and Entertainment Leader

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Planning for reach

November 2022

pwc

Planning for reach with BVOD

Sam Tomlinson
PwC Partner
UK Media and Entertainment Leader

Purpose of this study

For the first time, we have the data from CFlight and BARB Fusion to fill current knowledge gaps into how best to use BVOD to drive maximum incremental reach.

Identify *drivers of incremental reach* to inform BVOD planning

Objective:

- Create actionable insights that planners can use to drive campaign success through BVOD

Data sources:

- ✓ CFlight deduplicated output files
- ✓ CFlight BVOD impression level input files
- ✓ BARB Fusion to predict demographic breakdowns
- ✓ WARC/AA data to inform indicative CPTs

Data period: 1 July 2021 - 31 August 2022

Supported by analysis of BVOD *viewing habits*

Objectives:

- Test our planning recommendations with real life viewing data from the BARB panel
- Explore how the lightest linear viewers are consuming content

Data sources:

- ✓ BARB Fusion (4-screens using the Focal Meter)

Data period: 30 November 2021 - 30 September 2022

BVOD viewing habits

64% of BVOD viewing is through the **TV set** with an **average Viewer-Per-View (VPV) of 1.34**

Primetime viewing accounts for **36% of BVOD** and **31% of linear**

16-34 and ABC1 proportionally view more **BVOD** than linear:

- 16-34s account for **26% of BVOD** and **8% of linear**.
- ABC1s account for **61% of BVOD** and **49% of linear**.

Drama and Entertainment are the most watched genres on BVOD, accounting for **77%** of average daily minutes.

Our approach

A unique combination of **data** to unlock **insights**

From data...

CFlight™

CFlight output data

- Campaign reach values (Linear, BVOD, Total, Incremental)
- July 2021 - August 2022
- 1,259 campaigns, 292 brand advertisers, 9 broadcasters

Enriched with:

CFlight impression data (from broadcasters)

- Additional metadata: device, content genre, dayparts

BARB

BARB demographics data (e.g. 16-34s)

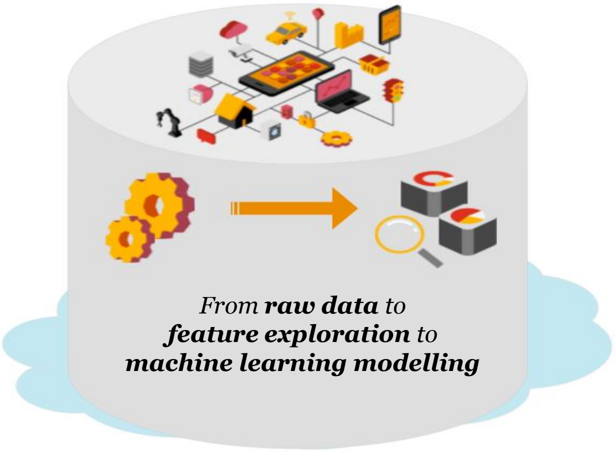
- July 2021 - August 2022
- Linear: 12 features, 98K points
- BVOD: 12 features, 50K points

WARC

CPT pricing data

- Estimated campaign costs

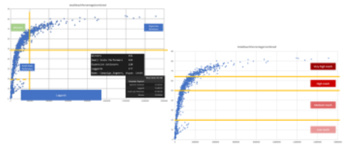
Analytics platform



...to *actionable* insights

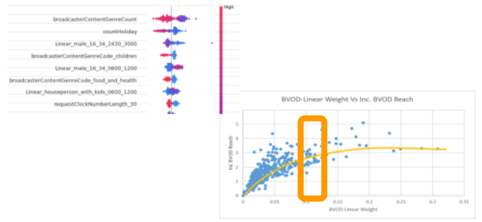
Campaign segmentation:

- splits existing campaigns into different sets based on their overall reach

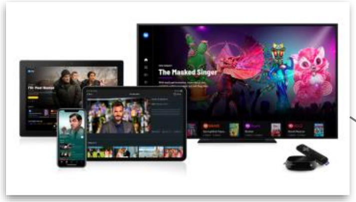


Feature estimation:

- aids in identifying the key features that impact a campaign's BVOD incremental reach
- providing deeper understanding of viewer demographics and viewing preferences



Segmenting campaigns based on overall reach



Campaigns and their reach

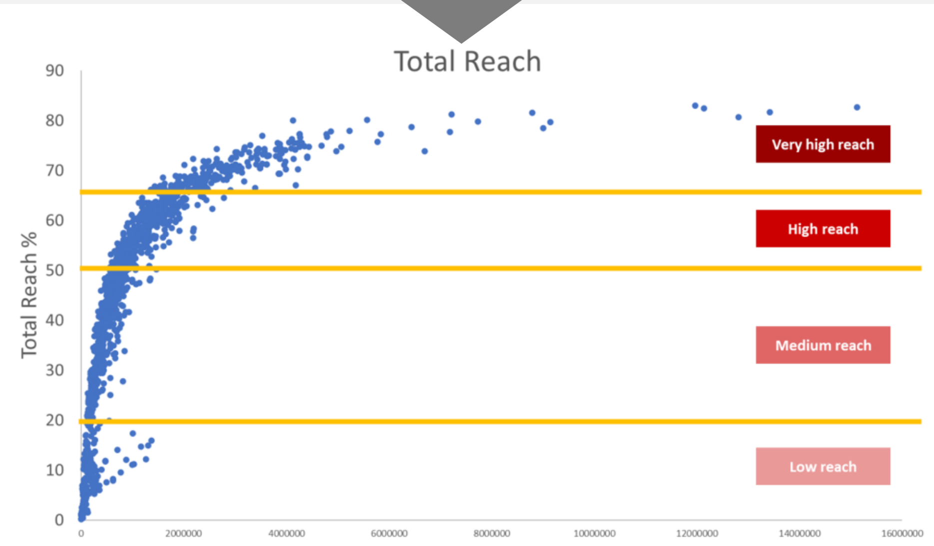
All campaigns have different budgets and reach objectives.

Therefore we have segmented campaigns by their reach in order to identify which features correspond with driving incremental reach.

Segmenting campaigns based on reach

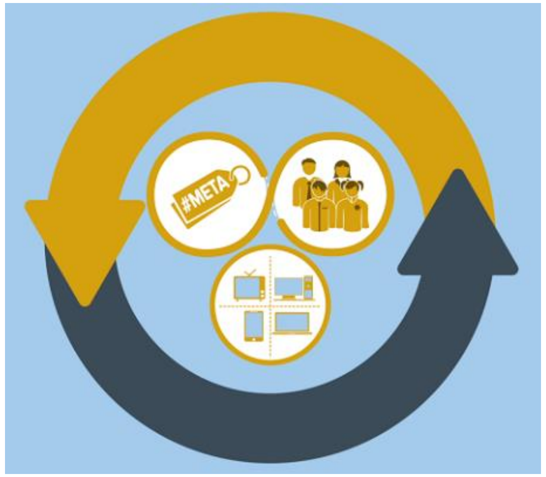
Reach

- Very high reach (> 65%)
- High reach (51-65%)
- Medium reach (21-50%)
- Low reach (0-20%)



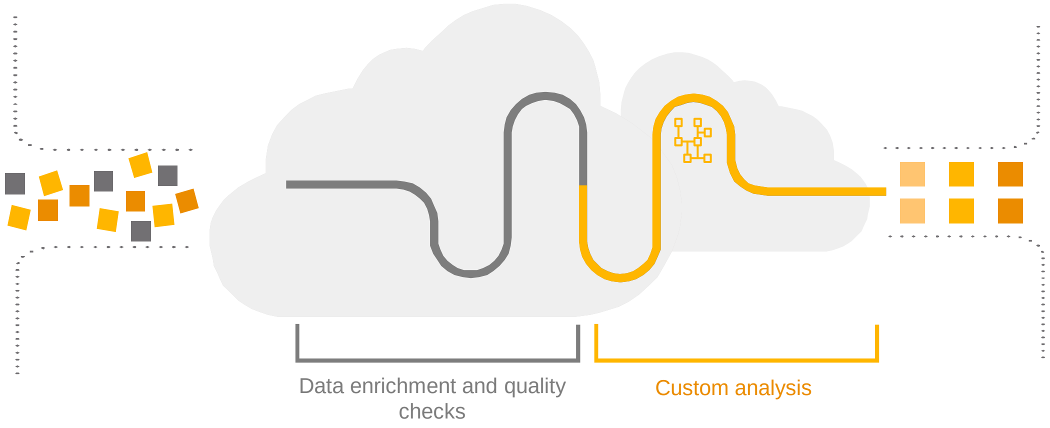
Supported by real life viewing habits

To support our insights, we have analysed viewing habits of the UK population using BARB Fusion data.



BARB

PwC data warehouse



Analytics to support BVOD planning recommendations

Data sources › **Bespoke data analysis** › **Supporting insights into BVOD viewing**

BVOD as driver of incremental reach

Features influencing BVOD incremental reach

BVOD Incremental Reach (IR)

- **Overall 4%** for all adults 16+ with top 10% campaigns yielding **9%**

- **~6% for ABC1s** and **~8% for 16-34s**
- Increasing to ~**8%** and **11%** for for top 10% campaigns respectively

Sales Houses Mix

Mix of Sales Houses drives up to 41% uplift in BVOD incremental reach than **single Sales House** campaigns

Content Genre

Campaigns delivered across **6-10** genres yield up to **2x** IR compared to those delivered across 1-5 genres

Campaign Duration

BVOD incremental reach increases by **3x** for **30-50 day duration** when compared to ones **sub 30 days**

Insights for BVOD incremental reach across reach segments

Low reach (0-20%)	Medium reach (21-50%)	High reach (51-65%)	Very high reach (> 65%)
Any 1 Sales House	Any 2 Sales Houses	3 Sales Houses	3 Sales Houses
2-3 genres (News being most prominent)	2-3 genres (News, Family most prominent)	6-8 genres (Food & Health, Action & Adventure most prominent)	6-10 genres (Children, Food & Health, Action & Adventure most prominent)
~ 30-34 Days	~ 30-39 Days	~ 38-42 Days	~ 40-47 Days
Breakfast Time, Daytime	Post Peak, Night Time	Early Peak, Primetime, Post Peak	Primetime, Early Peak, Post Peak

BVOD incremental reach

Insights for BVOD incremental reach across key demographics for "very high reach" campaigns

16-34 adults	ABC1 adults	Housepersons with children
Action & Adventure and Sports provide more incremental reach (IR) than others	**Lifestyle, Family, and Films** yield higher IR than others	**Children, Food & Health, Family** yield more IR than others
Peaktime and Post Peak yield higher IR than other times	**Peaktime and Early Peak** ads yield higher IR than other times	**Early Peak, Peaktime and Post Peak** ads lead to higher IR
Ads **<= 15 seconds** yield greatest IR	Ads **<=10 seconds** yield greatest IR	Ads **<=20 seconds** yield greatest IR

BVOD increases the chance of reaching lighter linear viewers

The odds of reaching audiences when targeting the '**middle tier'** of light linear users is **1 in 4 on BVOD** compared to **1 in 14 on linear** for the same group.

Light users in the **middle tier are 4x more likely** to be reached on **BVOD** than Linear.

Weight of Linear viewing	Average minutes per day	Proportion of TV consumption [%]		Contribution to platform [%]		Odds of reaching each segment (1 in x)		
	Total TV	Linear	BVOD	Linear	BVOD	Linear	BVOD	BVOD to linear odds
Bottom 0-10%	4	41%	59%	0%	3%	185	12	17x
Bottom 10-20%	12	64%	36%	1%	6%			
Bottom 20-30%	25	77%	23%	1%	7%	14	4	4x
Bottom 30-40%	47	83%	17%	2%	10%			
Bottom 40-50%	75	88%	12%	4%	11%			
Top 50-60%	115	92%	8%	6%	11%	1.1	2	0.5x
Top 60-70%	169	94%	6%	9%	12%			
Top 70-80%	244	96%	4%	14%	13%			
Top 80-90%	360	97%	3%	21%	13%			
Top 90-100%	734	98%	2%	42%	15%			
Total average	**89**	**95%**	**5%**	**100%**	**100%**			

The middle tier skews towards **ABC1 adults (71%) and 16-34 adults (42%)** segments.

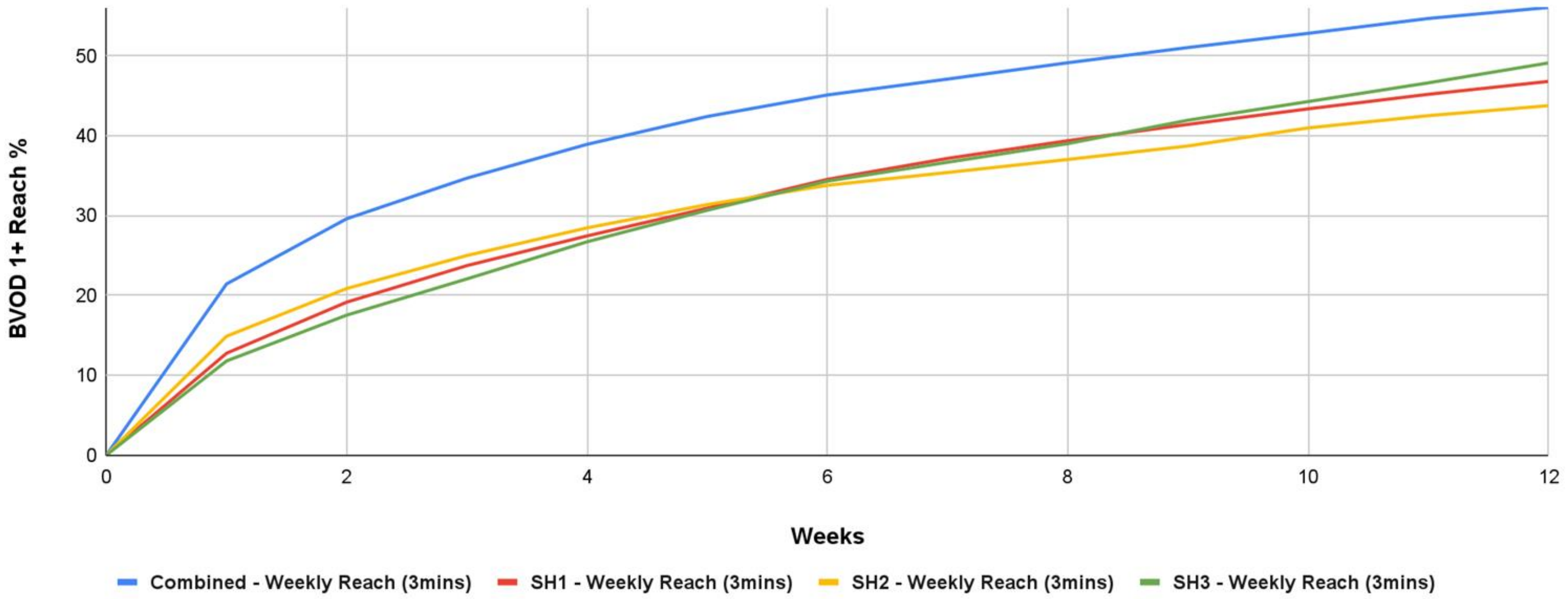
Light linear users: *The bottom 50% of audiences consuming linear by annual weighted minutes*
Middle tier: *30th to 50th percentiles*

BVOD planning recommendations

1. Planning across all three TV sales houses

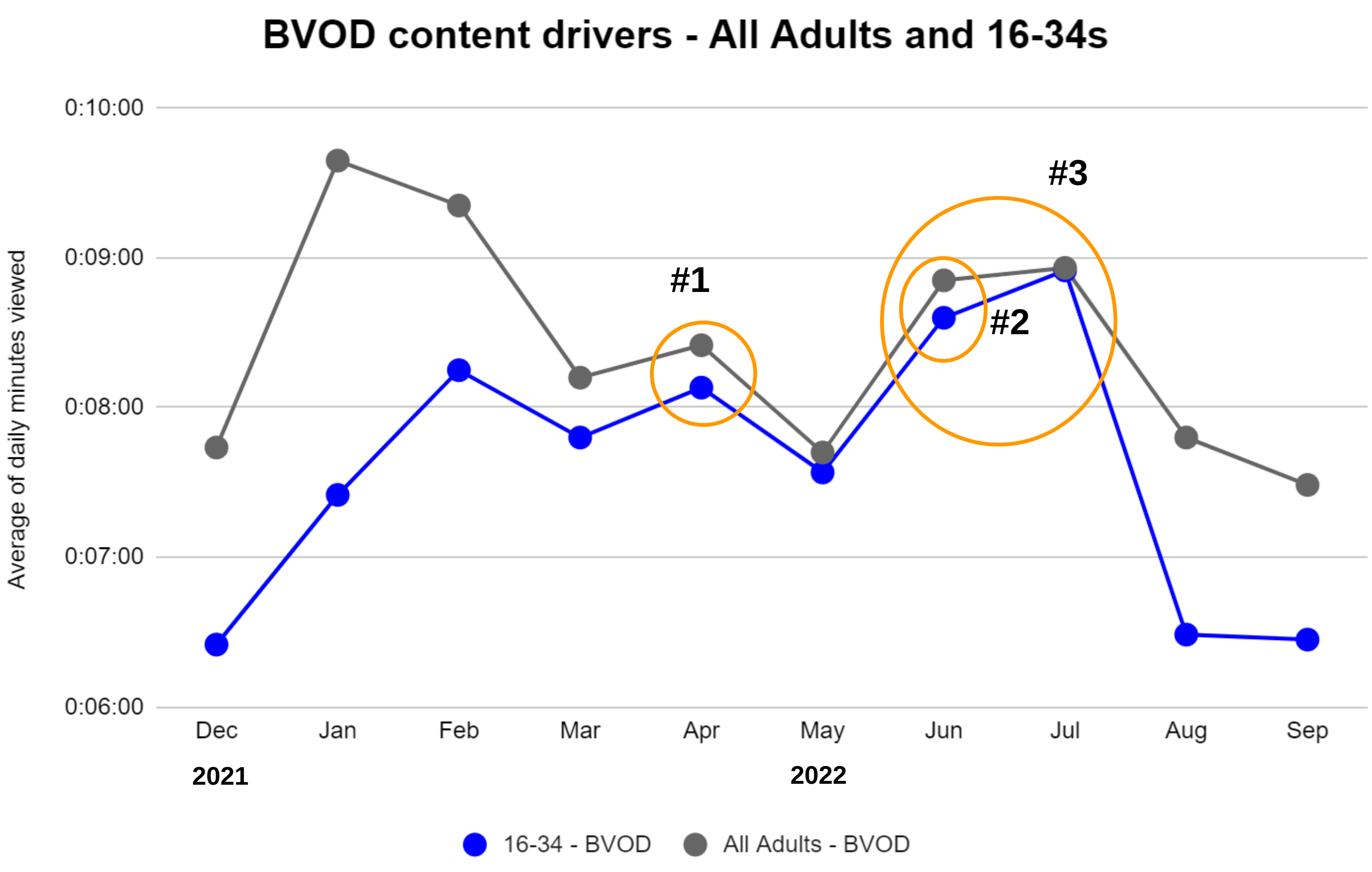
Our analysis of CFlight campaign data shows there is a **27% and 41%** lift in BVOD incremental reach for campaigns is delivered across **2 and 3 Sales Houses** respectively compared to single Sales House campaigns.

BARB data shows combined weekly reach is consistently higher than individual sales house reach over a 12 week period.



2. Plan in and around key programming

Peaks in **BVOD viewing** are **correlated** with the **release of key programmes.**

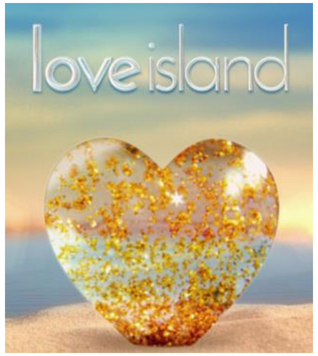


#1

Gogglebox season 19 drives up viewer minutes in March and April

#2

In June, the release of The Midwich Cuckoos spiked BVOD daily viewing



#3

Love Island season 8 contributed the lion's share of BVOD viewing in June and July

3. Plan across multiple genres for maximum incremental reach

Overall, campaigns delivered across **6-10** genres yield **2x** BVOD incremental reach compared with those delivered across 1-5 genres.

Some **specific genres** can be highly efficient for incremental reach for certain demographics, for example **Sports for 16-34s**, **Lifestyle for ABC1s** or **Children for Housepersons with Children**.

BARB data supports this hypothesis: the proportion of daily minutes consumed on BVOD compared to linear is higher for genres including **Lifestyle, Food & Health and Action & Adventure.**

Targeting these genres **is highly efficient** at increasing your odds of reaching lighter linear users and improving incremental reach.

16-34 adults

Action & Adventure and Sports provide more incremental reach (IR) than others

ABC1 adults

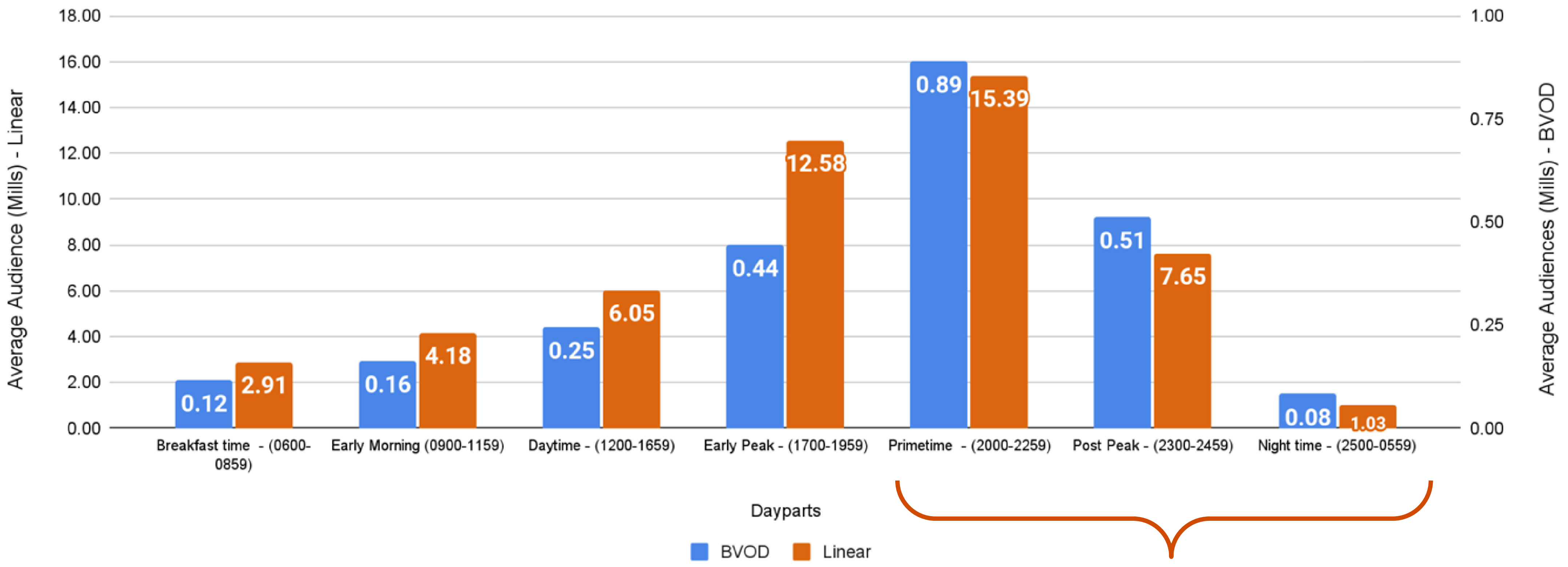
Lifestyle, Family, and Films contribute toward higher IR than others

Housepersons with children

Children, Food & Health, Family fetch more IR than others

4. BVOD peak time is a longer window than linear

Weekday BVOD viewing still peaks sharply during primetime hours, but the **peak window lasts longer** into the night compared with linear. Weekend patterns are similar but less pronounced.

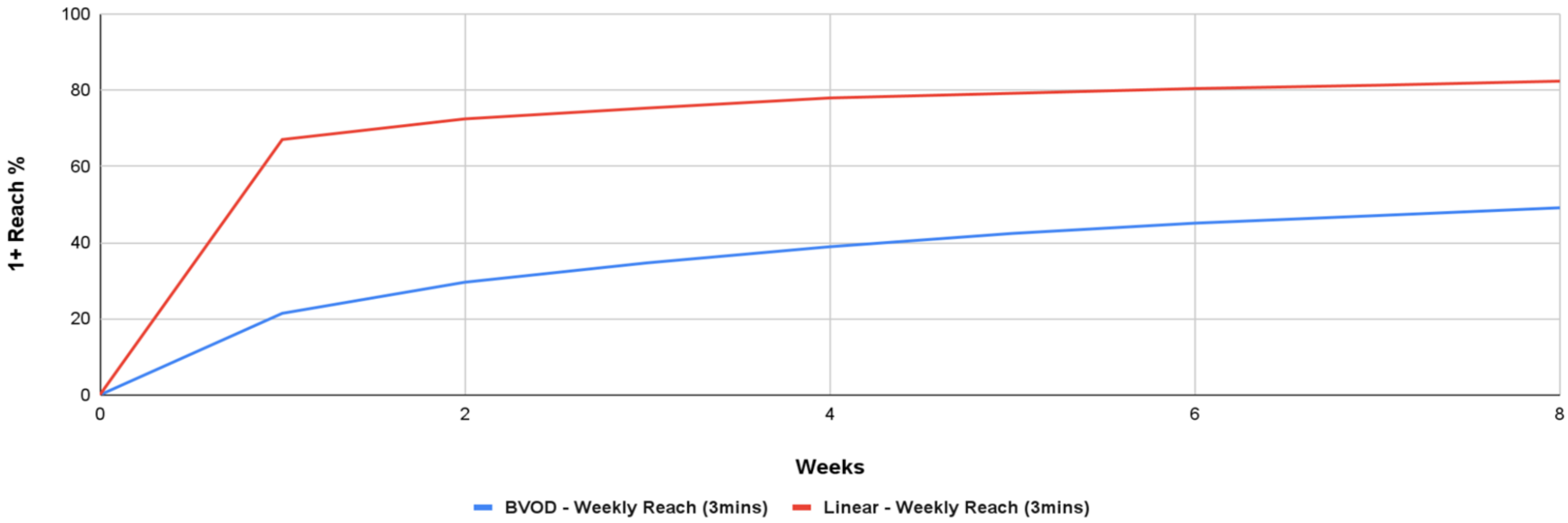


BVOD peak time (between 20:00 to 02:00) is a **longer window than Linear** (between 20:00 to 23:00).

5. Campaigns should run for ~30-50 days to optimise BVOD reach

We found that in high reach (51%-65%) and very high reach (>65%) campaigns, the most common BVOD campaign durations averaged between **38 and 47 days.**

BARB data analysis supports this as we see BVOD viewing weekly reach grow at a slower rate than linear across an 8 week period.



Summary

Summary

BVOD builds incremental reach

Our analysis found that, on average, BVOD adds **4% increase** in incremental adult (16+) reach to a linear campaign; **6% increase for Adult ABC1s and 8% increase for 16-34s**. Among the top performing 10% of campaigns, the % increase rises to **9% for Adults, 8% for Adult ABC1s and 11% for 16-34s.**

A major driver of this incremental reach is that he odds of reaching the lightest half of all TV viewing adults on BVOD are one-in-three compared with one-in-13 on linear.

Our analysis has identified five key BVOD planning tactics that lead to increased total TV reach. These are:

1. **Plan across all three TV sales houses:** 27% and 41% uplift* in BVOD incremental reach for campaigns delivered across 2 and 3 Sales Houses respectively
2. Plan in and around **key programming**, such as Love Island (ITV), Gogglebox (Channel 4) and high profile box sets like The Midwich Cuckoos (Sky)
3. **Plan across multiple genres:** campaigns delivered across 6-10 genres provide 2x BVOD incremental reach as compared to those delivered across 1-5 genres
4. **BVOD peak time is a longer window** than linear (17.30-00.30 compared with linear's 20.00-23.00)
5. Campaigns that run for **30-50 days deliver 3 times the incremental reach** of sub 30 day campaigns.

** Uplift is the average % increase on the BVOD incremental reach*

Thank you

A guide to BVOD success

Caroline Whitehill, Co-founder and strategist
Martin Lee, Co-founder and strategist
Acacia Avenue

Follow the conversation
#BvodInFocus
@ThinkboxTV

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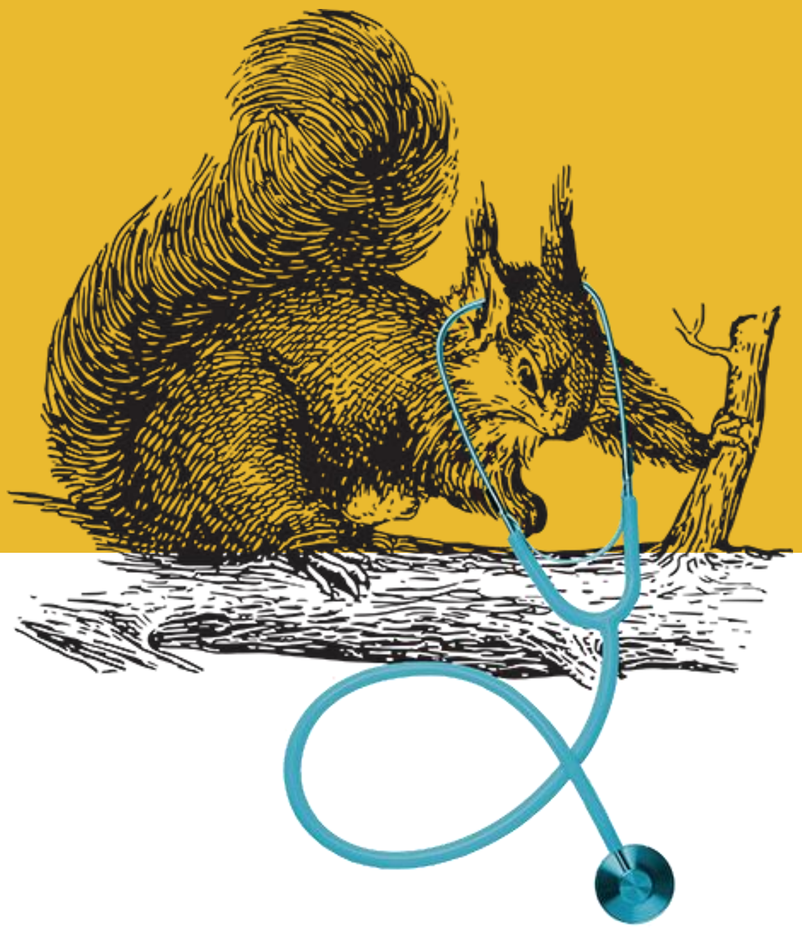
A guide to BVOD success



BAFTA

November 15th 2022

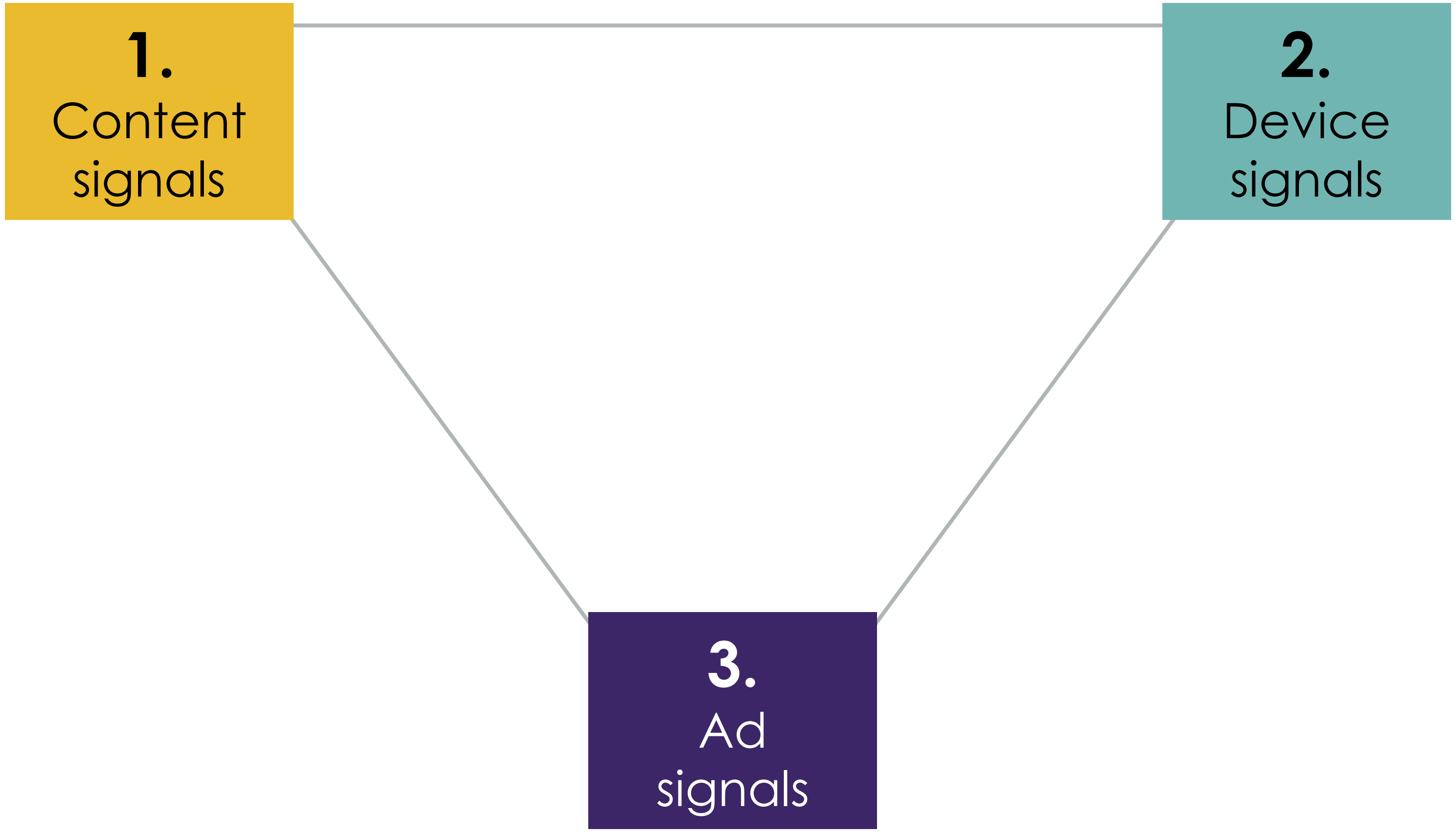
WHAT WE DID

Individual content and ad diaries

Ads close up and personal

Ads in a social environment

FACTORS INFORMING ADVERTISING ENGAGEMENT



FACTORS INFORMING ADVERTISING ENGAGEMENT

1. Content signals

Who?
How much value?
Content to ad ratio
New vs old content

2. Device signals

3. Ad signals

1.
Content signals

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

3.
Ad signals

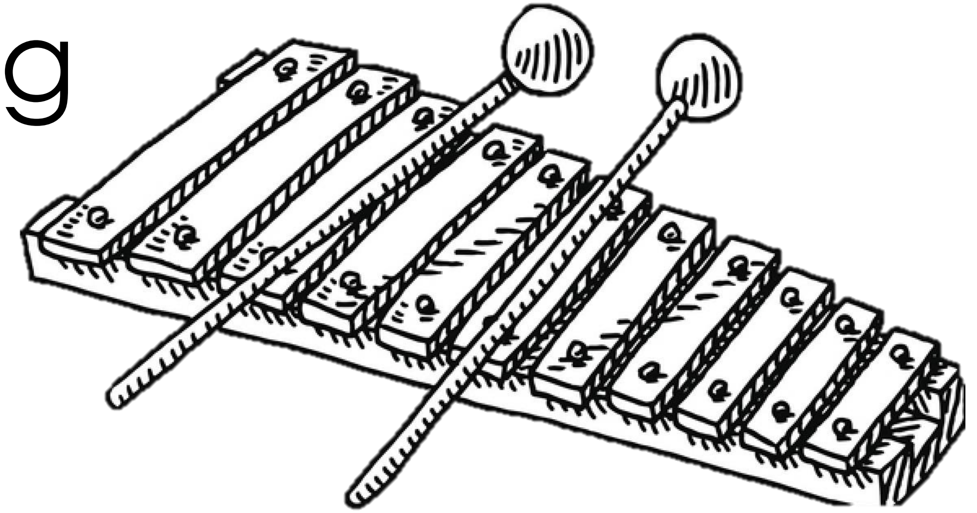
1.
Content signals

2.
Device signals

3. Ad signals

Nature + brand of ad
Frequency
How targeted/ tailored it is
Relationship to content

The interplay of these factors sets expectations for advertising



WORTH IT vs WORTH LESS

There are different value exchanges across advertising environments

Content signals

Who?
How much value?
Content to ad ratio
New vs old content

	RESPECTED · SOUGHT OUT · CURRENT
BVOD	
LINEAR	
YOUTUBE	
SOCIAL	
TIKTOK	

CONTENT SIGNALS: ACROSS ENVIRONMENTS

Content signals

Who?
How much value?
Content to ad ratio
New vs old content

BVOD	RESPECTED · SOUGHT OUT · CURRENT
LINEAR	ESTABLISHED · MIXED USE · OLD&NEW
YOUTUBE	
SOCIAL	
TIKTOK	

CONTENT SIGNALS: ACROSS ENVIRONMENTS

Content signals

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New vs old content

BVOD	RESPECTED · SOUGHT OUT · CURRENT
LINEAR	ESTABLISHED · MIXED USE · OLD&NEW
YOUTUBE	ADMIRED · FILLER · RANDOM SELECTION
SOCIAL	
TIKTOK	

CONTENT SIGNALS: ACROSS ENVIRONMENTS

Content signals

Who?
How much value?
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New vs old content

BVOD	**RESPECTED · SOUGHT OUT · CURRENT**
LINEAR	**ESTABLISHED · MIXED USE · OLD&NEW**
YOUTUBE	**ADMIRED · FILLER · RANDOM SELECTION**
SOCIAL	**VALUED · NETWORK-LED · MASH-UP**
TIKTOK	

CONTENT SIGNALS: ACROSS ENVIRONMENTS

Content signals

Who?
How much value?
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BVOD	RESPECTED · SOUGHT OUT · CURRENT
LINEAR	ESTABLISHED · MIXED USE · OLD&NEW
YOUTUBE	ADMIRED · FILLER · RANDOM SELECTION
SOCIAL	VALUED · NETWORK-LED · MASH-UP
TIKTOK	ENJOYED · RABBITHOLE · BLUR

CONTENT SIGNALS: KEY INSIGHTS FOR BVOD?

#TakenOnTrust

Bigger brands
=
Bigger budgets
=
Trusted, quality environment

#InTheClub

Willing to invest – time, money, energy

#HorsesForCourses

Advertising as a reward - match the viewing experience

WE vs ME

There are different rules of engagement across advertising environments

DEVICE SIGNALS: ACROSS ENVIRONMENTS

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

BVOD	LAID BACK · BIG SCREEN · OURS/ MINE
LINEAR	
YOUTUBE	
SOCIAL	
TIKTOK	

DEVICE SIGNALS: ACROSS ENVIRONMENTS

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

BVOD	LAID BACK · BIG SCREEN · OURS/ MINE
LINEAR	HANDS OFF · BIG SCREEN · OURS
YOUTUBE	
SOCIAL	
TIKTOK	

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

BVOD	LAID BACK · BIG SCREEN · OURS/ MINE
LINEAR	HANDS OFF · BIG SCREEN · OURS
YOUTUBE	ENGAGED · DEVICE RANGE · SHARED
SOCIAL	
TIKTOK	

DEVICE SIGNALS: ACROSS ENVIRONMENTS

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

BVOD	LAID BACK · BIG SCREEN · OURS/ MINE
LINEAR	HANDS OFF · BIG SCREEN · OURS
YOUTUBE	ENGAGED · DEVICE RANGE · SHARED
SOCIAL	HANDS ON · MEDIUM/ SMALL · MINE
TIKTOK	

Device signals

Nature of interaction
Size and volume
Solus vs co-viewed
Perceived use of data

BVOD	LAID BACK · BIG SCREEN · OURS/ MINE
LINEAR	HANDS OFF · BIG SCREEN · OURS
YOUTUBE	ENGAGED · DEVICE RANGE · SHARED
SOCIAL	HANDS ON · MEDIUM/ SMALL · MINE
TIKTOK	IMMERSED · MOBILE · MINE

#SizeMatters

Bigger screen
+
higher volume
=
win

#Chatterbox

Social space
+
social device
=
talkability

#FaceValue

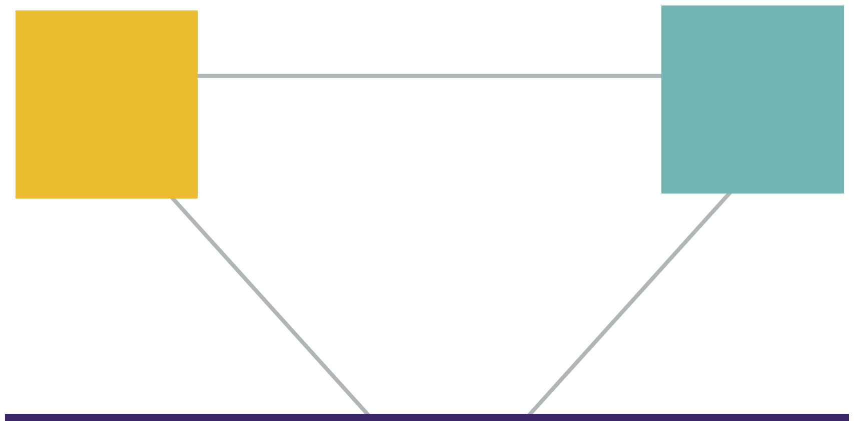
Communal device
=
less scrutiny for ads

AD SIGNALS: KEY THEME

RESONANCE vs RELEVANCE

The different backdrops between content and device affect how the ads fit

RESONANCE vs RELEVANCE



Ad signals

Type of brand + ad
How often it's shown
How targeted/ tailored it is
How it's used alongside content

BVOD

LINEAR

STORYTELLING · PAIRED TO CONTENT · EXPECTED

YOUTUBE

SOCIAL

TIKTOK

AD SIGNALS: ACROSS ENVIRONMENTS

Ad signals

Type of brand + ad
How often it's shown
How targeted/ tailored it is
How it's used alongside content

BVOD LINEAR	STORYTELLING · PAIRED TO CONTENT · EXPECTED
YOUTUBE	ALL SORTS · TARGETED · MANY WAYS OF SERVING
SOCIAL	
TIKTOK	

AD SIGNALS: ACROSS ENVIRONMENTS

Ad signals

Type of brand + ad
How often it's shown
How targeted/ tailored it is
How it's used alongside content

BVOD, LINEAR	STORYTELLING · PAIRED TO CONTENT · EXPECTED
YOUTUBE	ALL SORTS · TARGETED · MANY WAYS OF SERVING
SOCIAL, TIKTOK	MIX OF STYLES · TAILORED · ADS LABELLED

Ad signals

Type of brand + ad
How often it's shown
How targeted/ tailored it is
How it's used alongside content

BVOD LINEAR	STORYTELLING · PAIRED TO CONTENT · EXPECTED
YOUTUBE	ALL SORTS · TARGETED · MANY WAYS OF SERVING
SOCIAL	MIX OF STYLES · TAILORED · ADS LABELLED
TIKTOK	SMALLER NAMES · RANDOM FIT · INDISTINGUISHABLE TO CONTENT

AD SIGNALS: KEY INSIGHTS FOR BVOD

#HeartFirst
Resonance is emotional

#Engaged
Engaging content, engaging ads

#KeepItFresh
Multiple versions and mild twists hold attention

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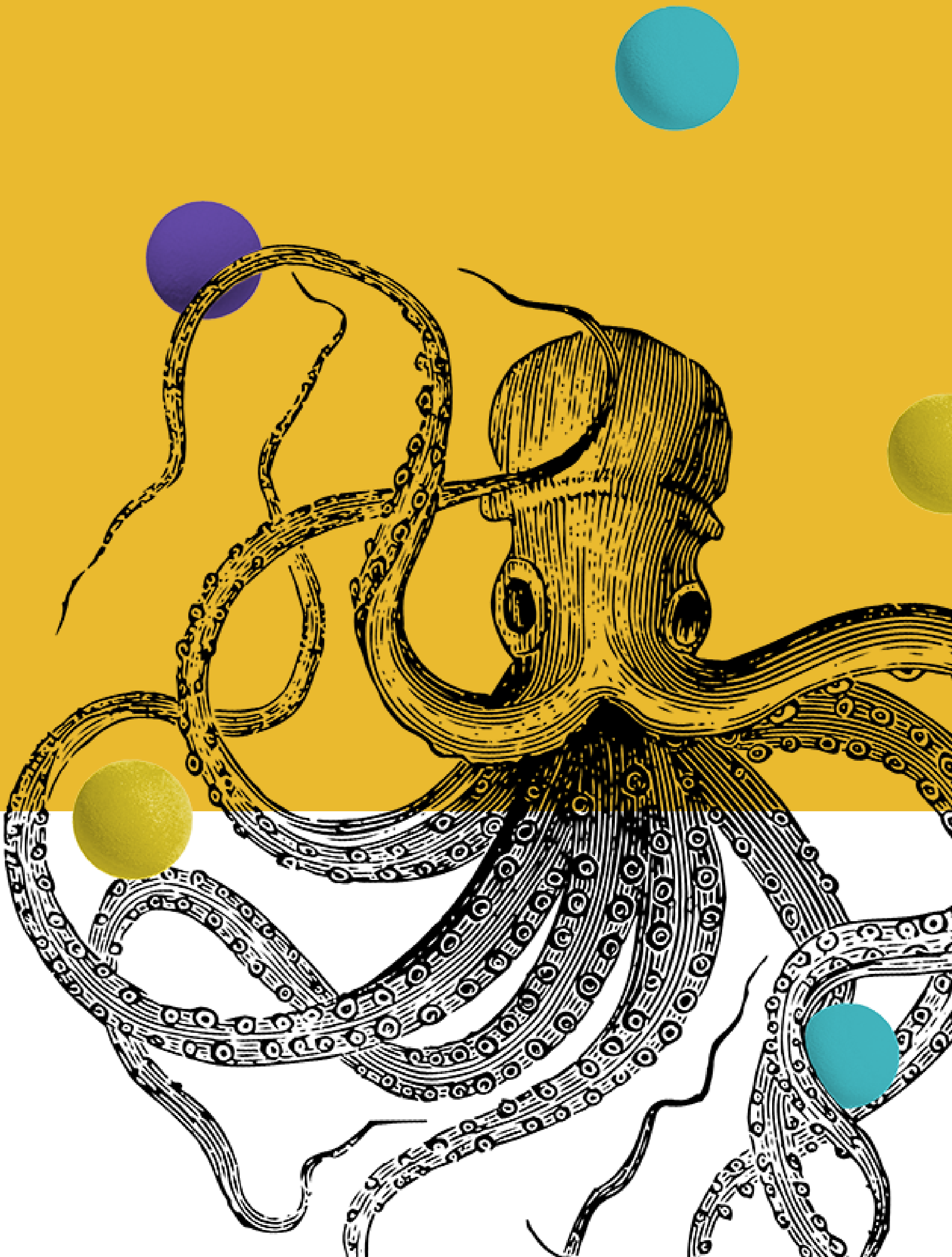
So what?



OPPORTUNITIES AND CHALLENGES

BVOD

Act like linear – think resonance.
Broad beam, long term brand building
But add another more targeted dimension

LINEAR

The rhythm of the linear ad break sets the standard
This drives the value exchange and acceptance of ads
BVOD would benefit from mirroring this more closely

YOUTUBE

Mix of content and ad styles is difficult to assimilate
By presenting the ads as countdowns and skippable,
YouTube is teaching viewers to scrutinise and resent the ads

SOCIAL

Platforms for narrow beam, sales focused messaging –
prime real estate for newer, lower priced brands

TIKTOK

Storytelling opportunity for brands – works best when genuinely
promoting content, either through credible third party,
or by labelling ads as ads

MEDIA:
SO WHATS for BVOD

1.
Linear + BVOD extends breadth and depth of engagement

2.
Think broadbeam

3.
Potential to be big and personal

4.
Halo effect for smaller brands

5.
Mix it up

CREATIVE: SO WHATS for BVOD

1.
Match the company you keep

2.
Low interest categories will benefit from high interest environment

3.
Create for big screen, shared environment… and personal forum

4.
Resonance, not just relevance - music, emotion, stories, humanity

5.
Distinctive assets are key

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