

Going Steady: How Long Will (My Cross-Media Campaign) Last?



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Comscore



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CONNECTING THE DOTS

AGENDA

Consumer trends...
connecting the dots

How does this impact
how we think about
reaching and
influencing
consumers?

Where do we
go from here?

It was the best of times,

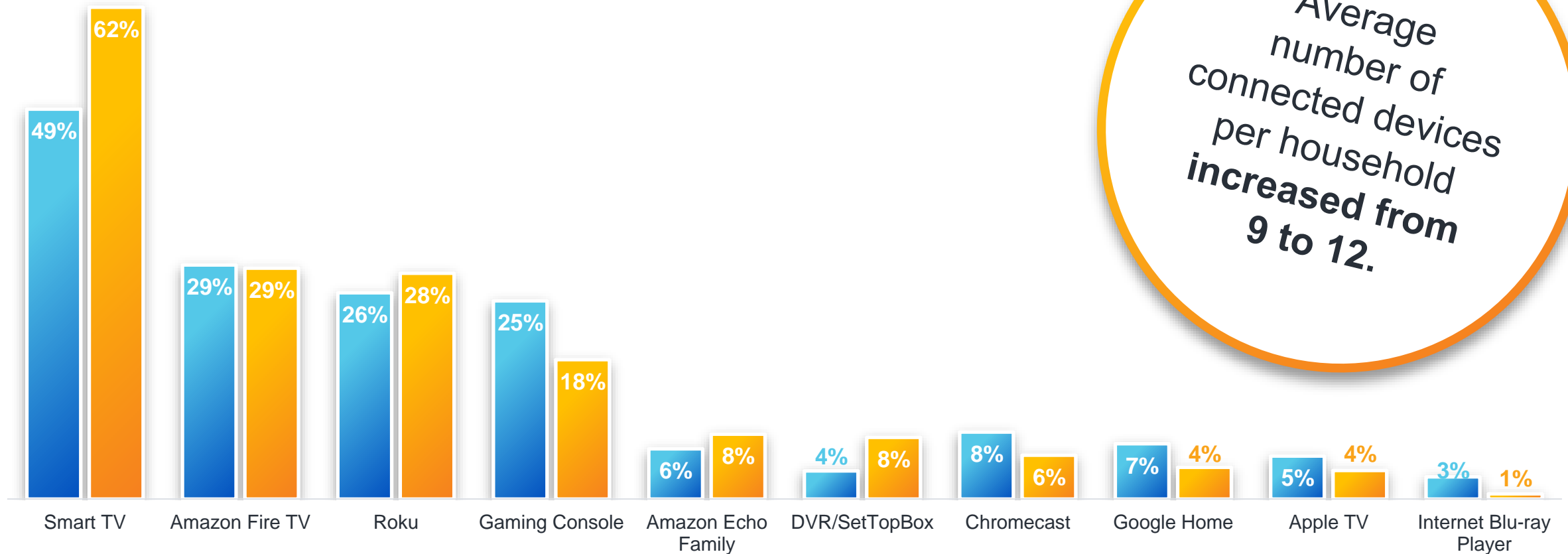
it was the worst of times...

CHARLES DICKENS

"CROSS PLATFORM" IS NOT JUST CROSS PLATFORM ANYMORE...

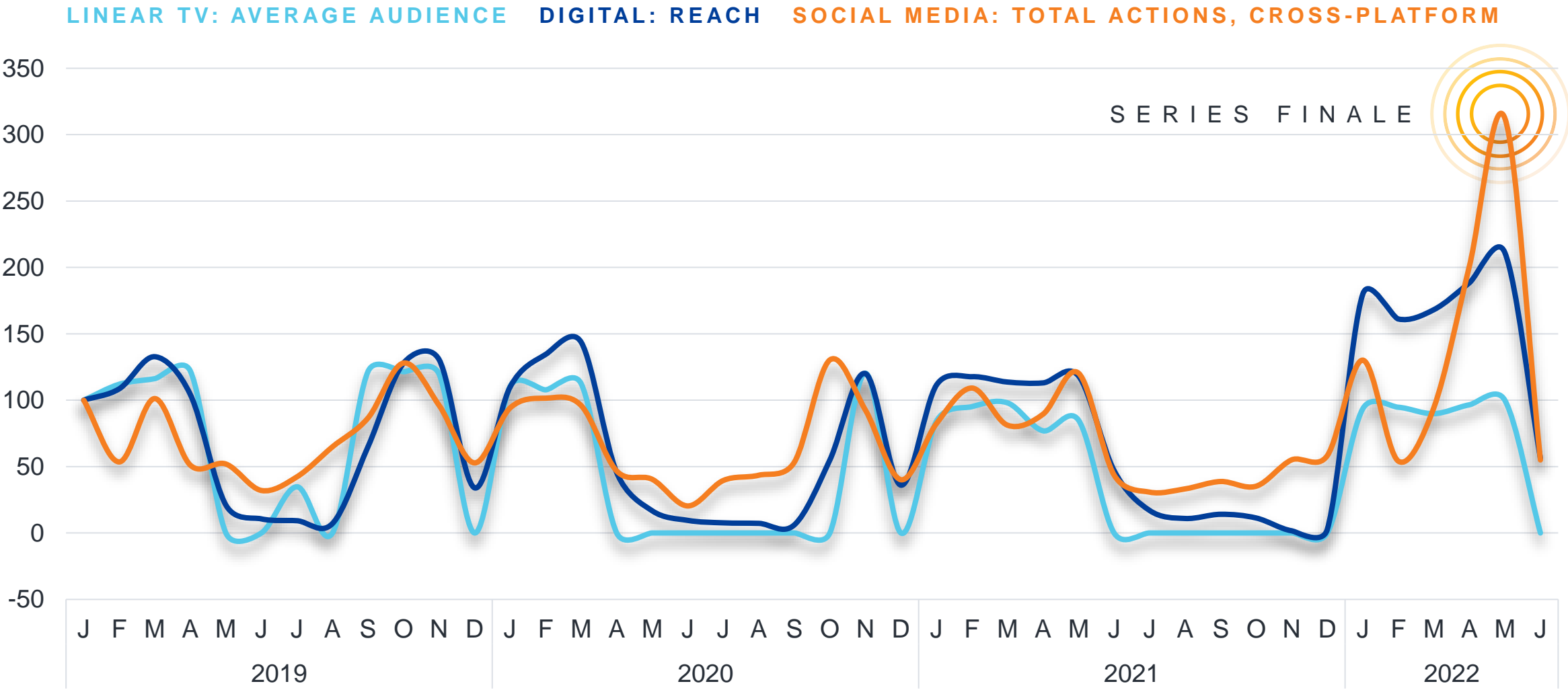
TOP TEN CTV DEVICES: % OF TOTAL CTV HOUSEHOLDS

JAN 2020 JAN 2023



MEDIA CONSUMPTION IS GETTING SMUSHED TOGETHER

NETWORK TV SERIES CROSS-SCREEN ENGAGEMENT • INDEX, JAN 2019=BASE 100



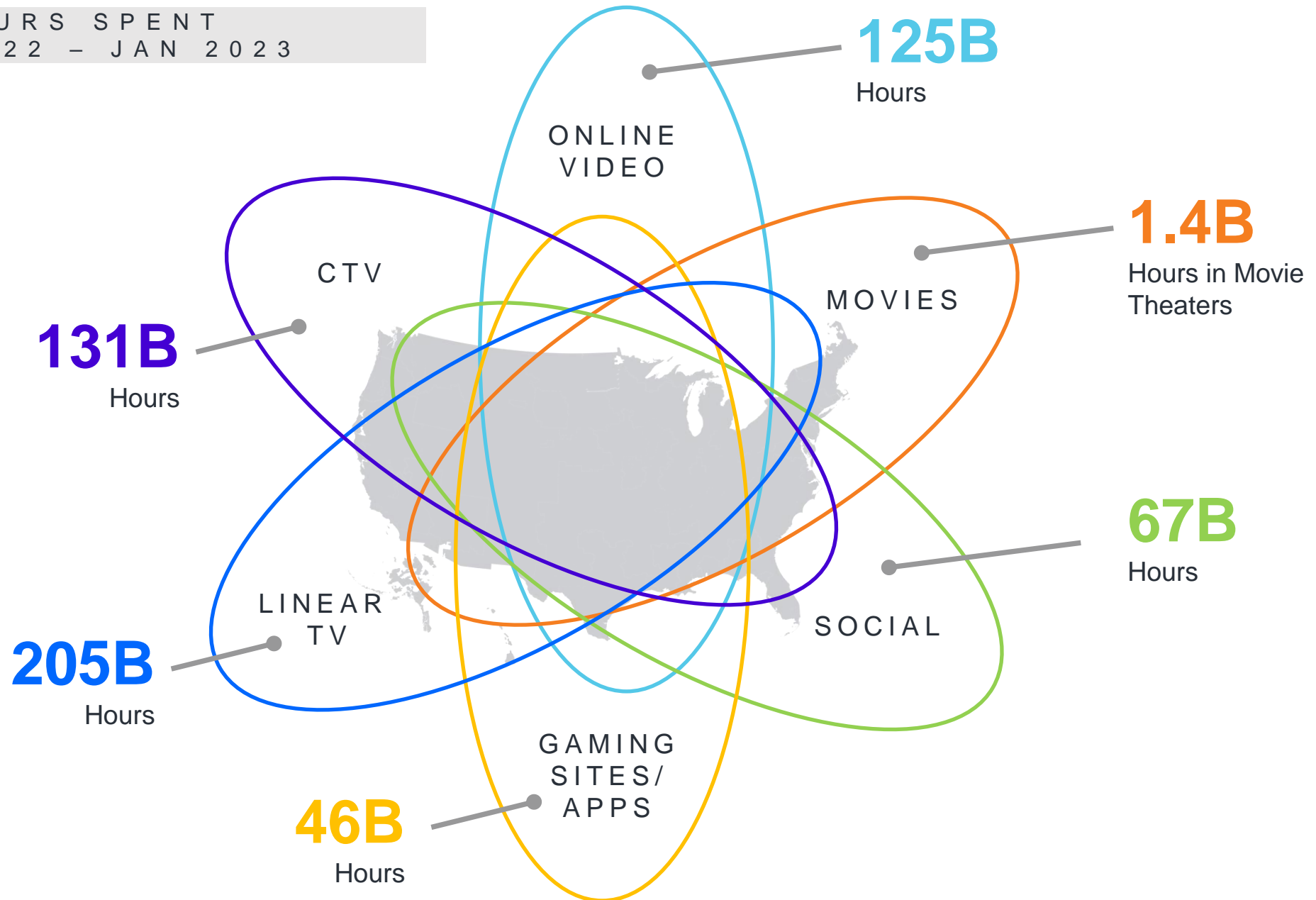
WHILE CONTENT CONTINUES TO CONVERGE

TOTAL SOCIAL ENGAGEMENT – US BRANDS & INFLUENCERS (FB, TT, TW, IG)

28%
ACROSS
PLATFORMS
'22 VS '20

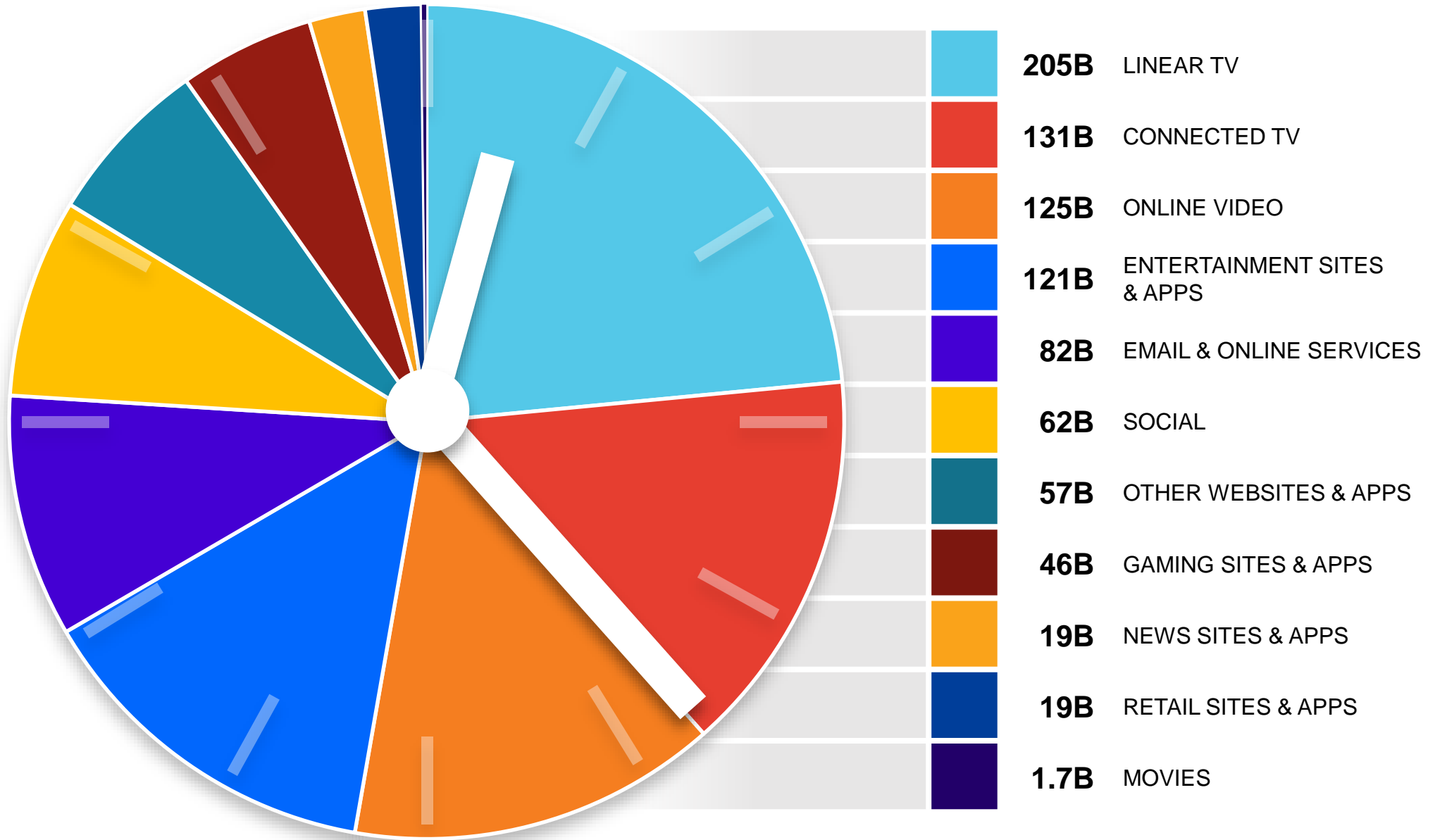


HOURS SPENT
JAN 2022 – JAN 2023



HOURS SPENT

JAN 2022-
JAN 2023



Total video across **linear**,
CTV & **digital** grew

5%

year-over-year in the U.S.



SHORT FORM VIDEO ALSO CONTINUES TO RISE

Engagement on Reels, TikTok, and Shorts are all growing for US Brands & Publishers

+91%

ACTIONS
2021-2022

Instagram Reels

+95%

ACTIONS
2021-2022

TikTok

+70%

LIKES
2021-2022

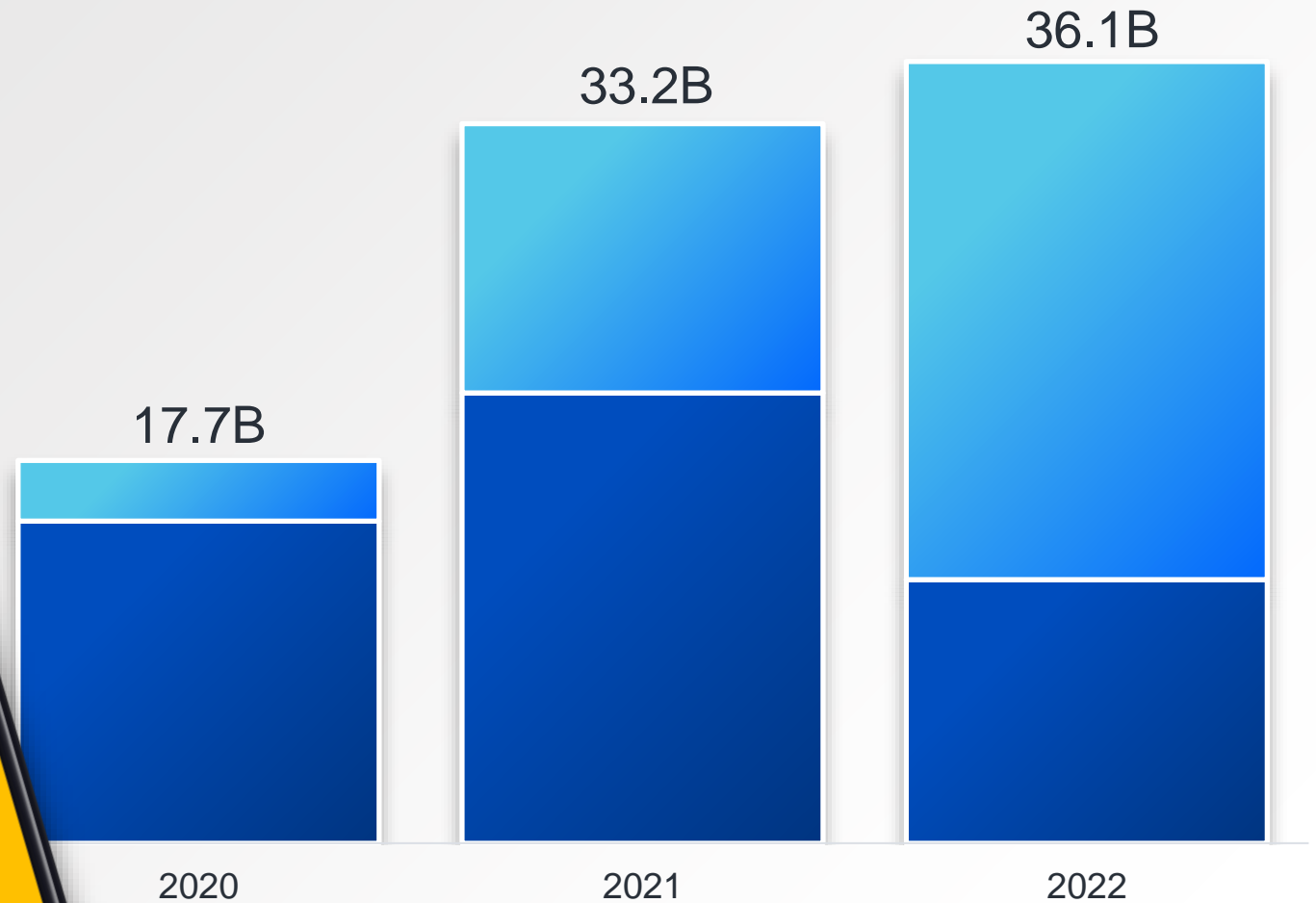
YouTube Shorts

TRENDS WE SEE: U.S. SHORT FORM VIDEO ENGAGEMENT UP 92% OVER 2021



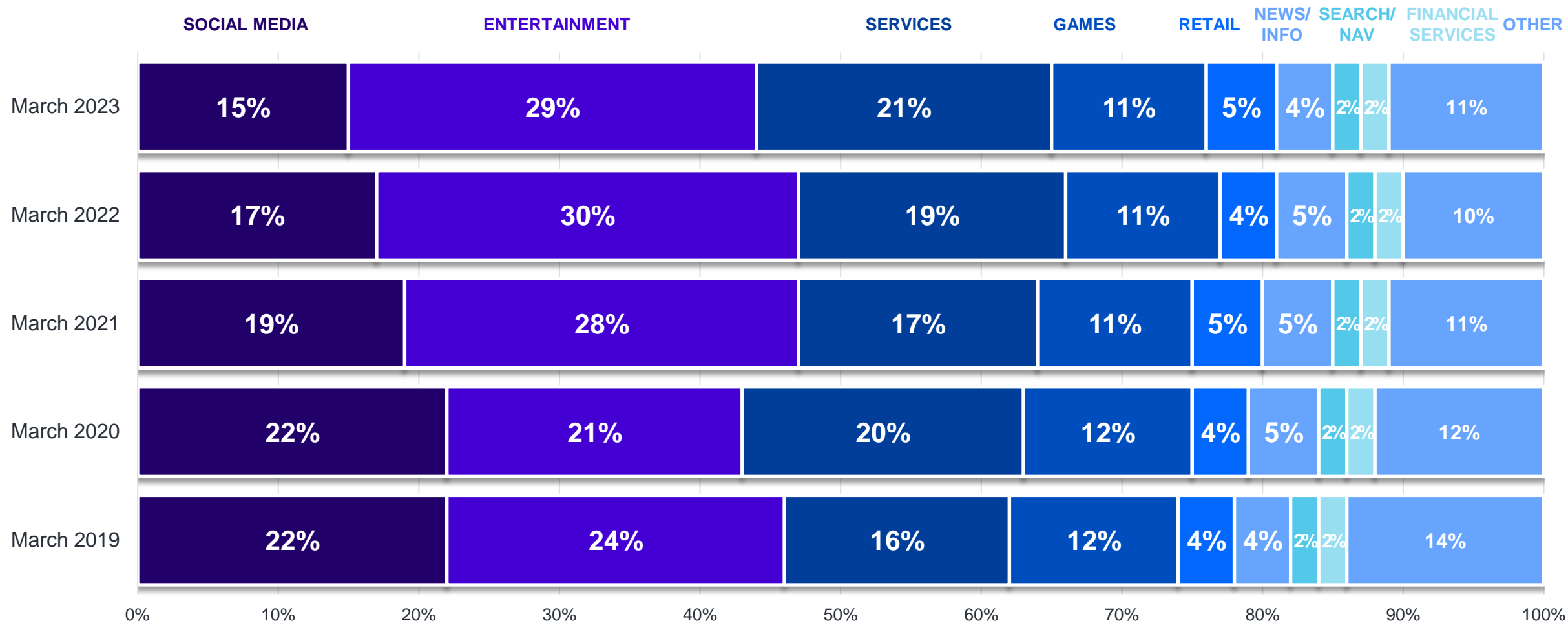
REELS ACTIONS

CAROUSEL ACTIONS



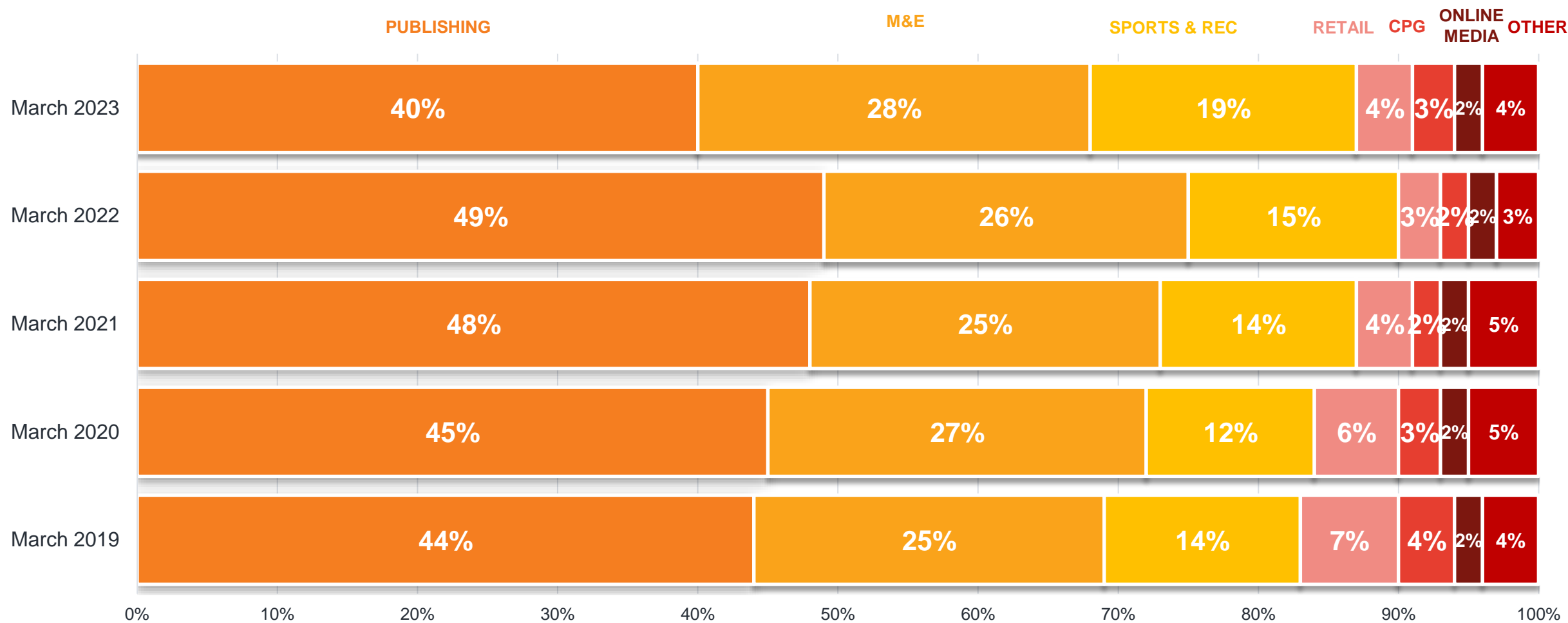
WHERE ARE PEOPLE SPENDING THEIR TIME ONLINE?

TIME SPENT ONLINE BY CONTENT CATEGORY



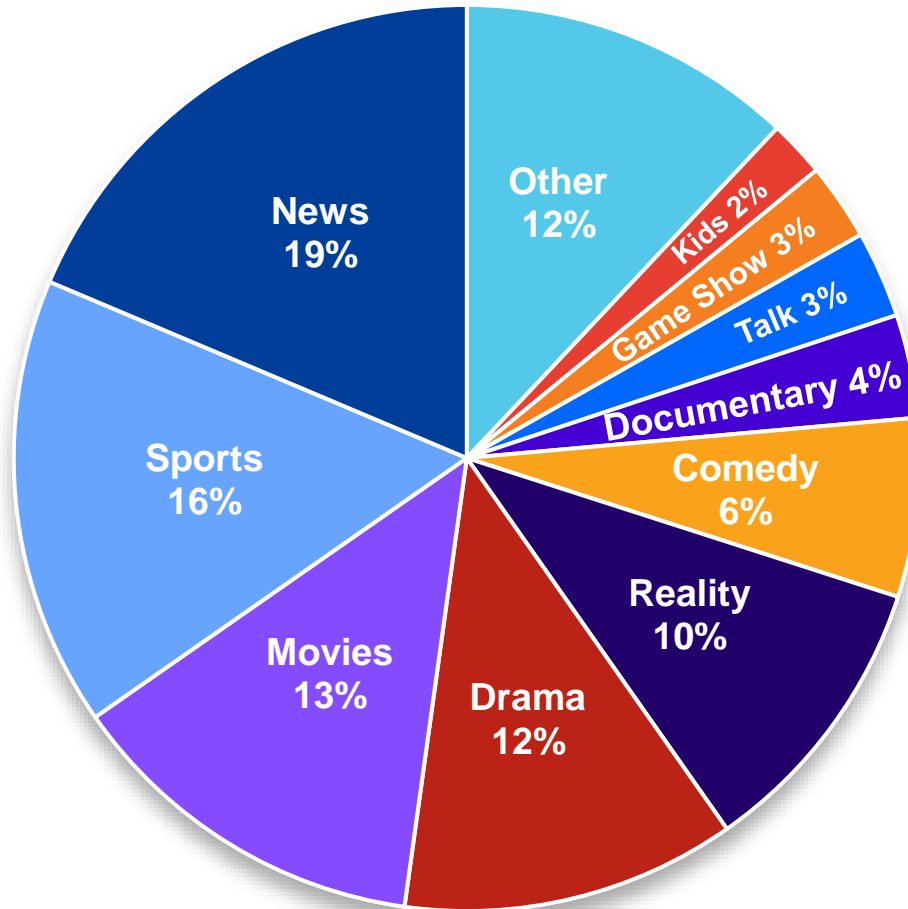
WHERE ARE PEOPLE ENGAGING ON SOCIAL?

SHARE OF ACTIONS BY CATEGORY



SPORTS IS THE SECOND MOST VIEWED GENRE ON TV, AND SAW THE LARGEST YOY INCREASE VERSUS 2021

% OF TOTAL HOURS VIEWED
ALL NETWORKS 2022: BY GENRE (LIVE)



LARGEST YOY CHANGE:
BY GENRE

Genre	% Change v. 2021
Sports	+0.9%
Drama	+0.8%
News	+0.5%
Talk	+0.5%
Comedy	+0.3%

Genre	% Change v. 2021
Movies	-1.8%
Kids	-0.6%
Animation	-0.3%
Home & Garden	-0.2%
Reality	-0.1%

GEN Z AUDIENCE PERSONA

HOUSEHOLD INCOME

54% have HHI income of \$75K+

EDUCATED

Over 1 in 5 have a Bachelors Degree

HEALTH AND SELF CONSCIOUS

93% seek new ways to lead healthier lifestyle

39% care what others think of them

ONLINE SHOPPING ENTHUSIASTS

69% use the internet to shop to get the best price

44% mention they shop online to try new things

30% mention they clicked on social ad

PHILANTHROPISTS

27% have volunteered in last 6 months

46% donated goods to non-profit org in last 6 months

ENVIRONMENTALLY CONSCIOUS

66% take part in environmentally friendly actions (i.e. recycling, using environmentally safe products, partaking in energy saving methods, etc)

ENTERTAINMENT ENTHUSIASTS

79% use OTT in their household

61% say that internet is a source of entertainment

48% mention they prefer watching shows on live TV

BUDGET CONSCIOUS / WILL SPLURGE ON RIGHT BRAND

1 in 5 mention price is the most important consideration when making a purchase

1 in 5 mention they will pay more for a product made by a company they trust

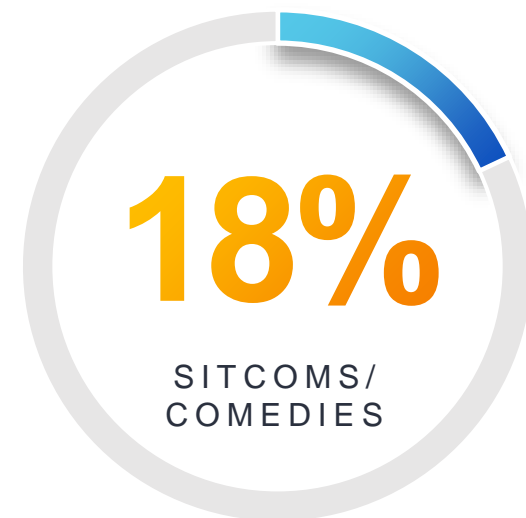
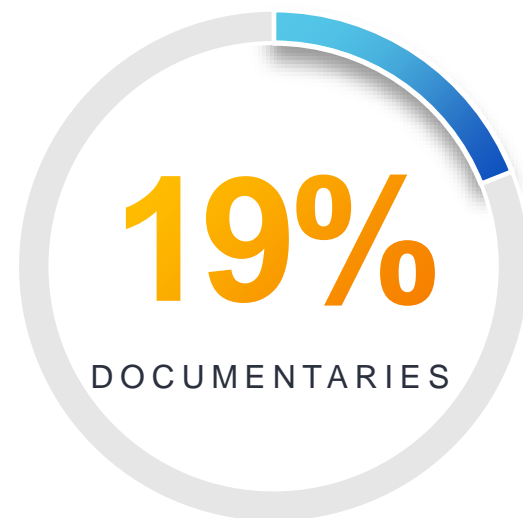
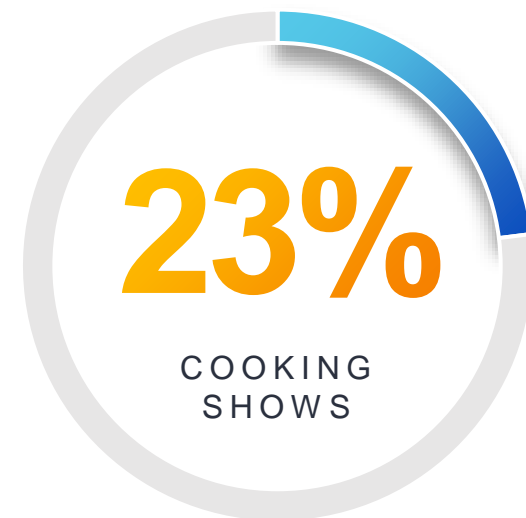
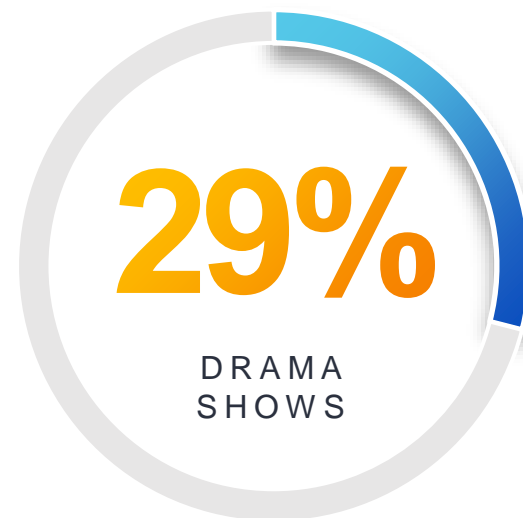
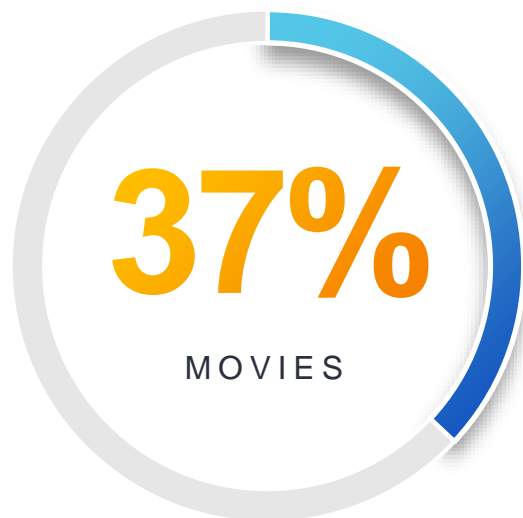
BRAND LOYAL

38% stick to a brand when they find one they like

GAMING ENTHUSIASTS

86% are interested in various topics related to video gaming

GENRES WATCHED BY GEN Z IN A TYPICAL WEEK



AND NO (AUDIENCE) IS ANY ONE THING...

Adult Animation Fans engagement with **Bel-air** has a **124.34** index compared to the average engager on social.



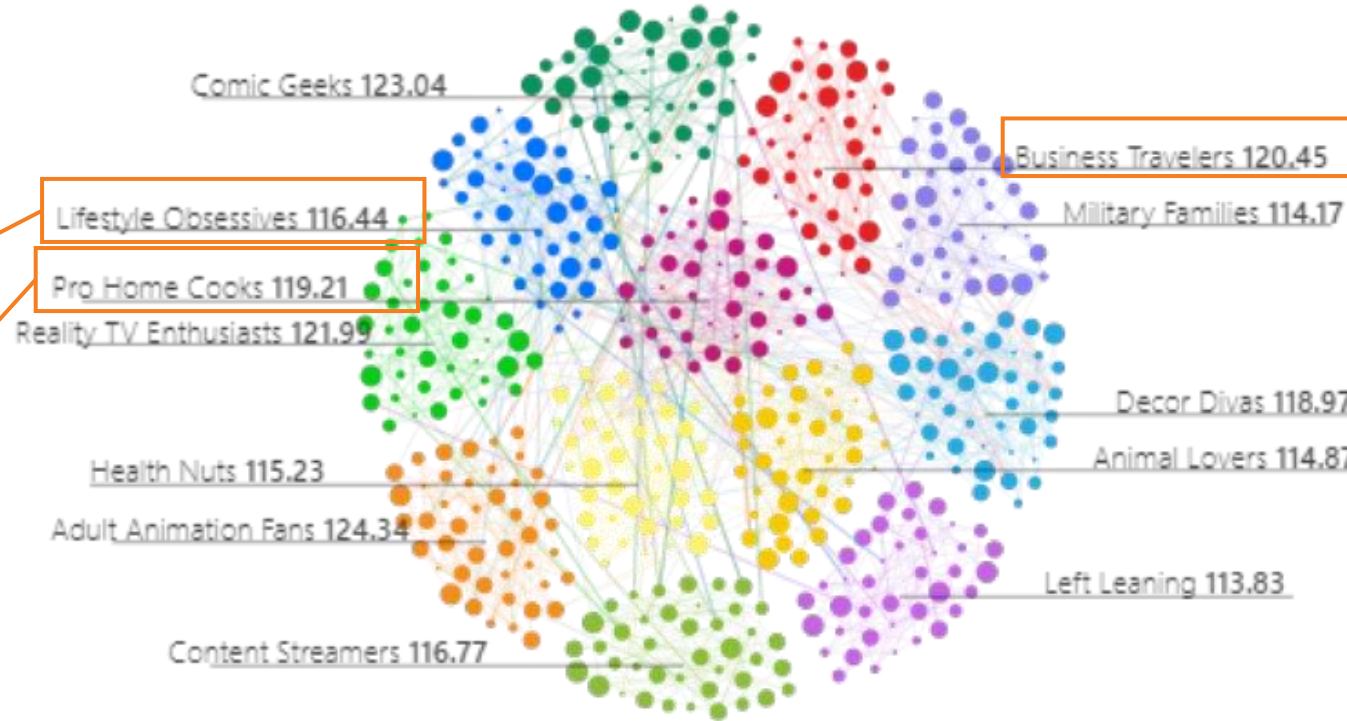
BUSINESS TRAVELERS



LIFESTYLE OBSESSIVES



PRO HOME COOKS



Audience Affinities:

15x
MOVIES

12x
INSURANCE

11x
LEISURE & TRAVEL

AGENDA

Consumer trends...
connecting the dots

How does this impact
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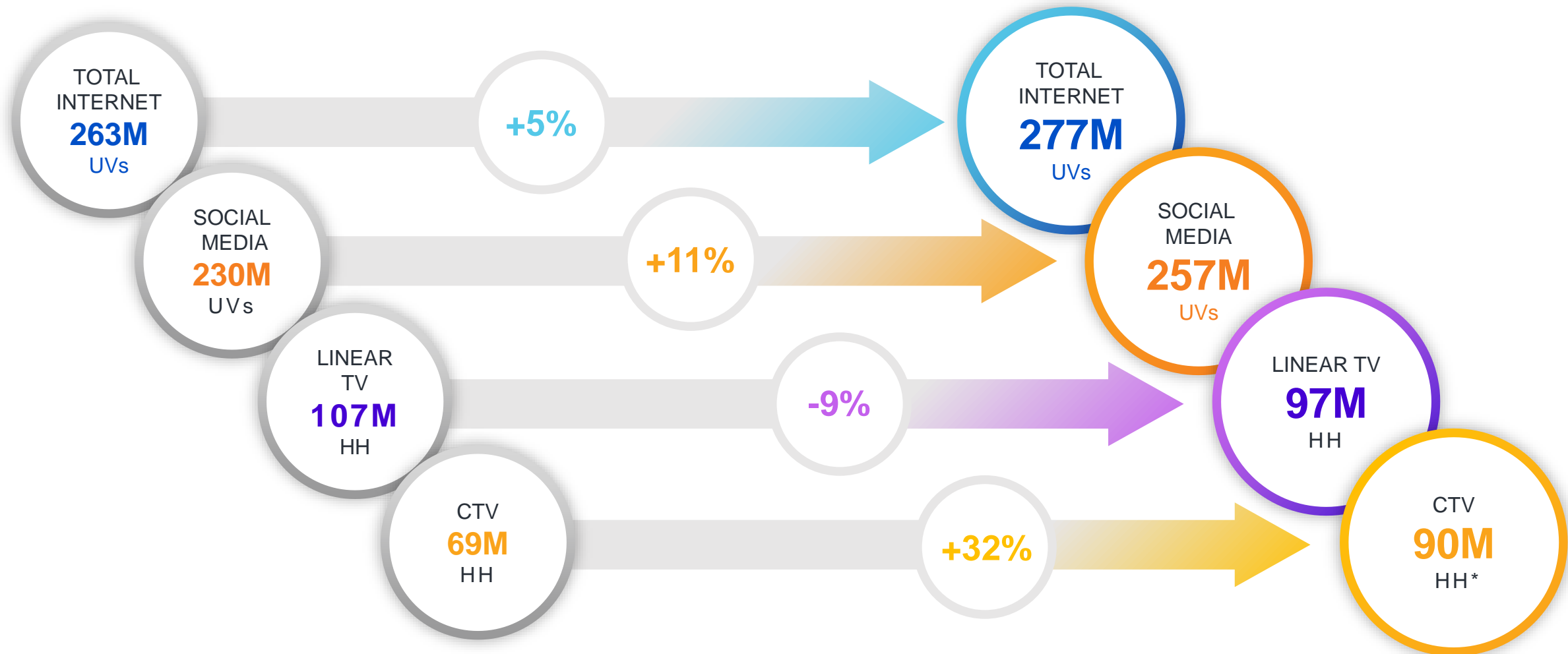
Where do we
go from here?

MORE CONTENT IS CREATED AND CONSUMED THAN EVER BEFORE, TO LARGER AUDIENCES

UNIQUE VISITORS ACROSS SOCIAL MEDIA AND TOTAL INTERNET

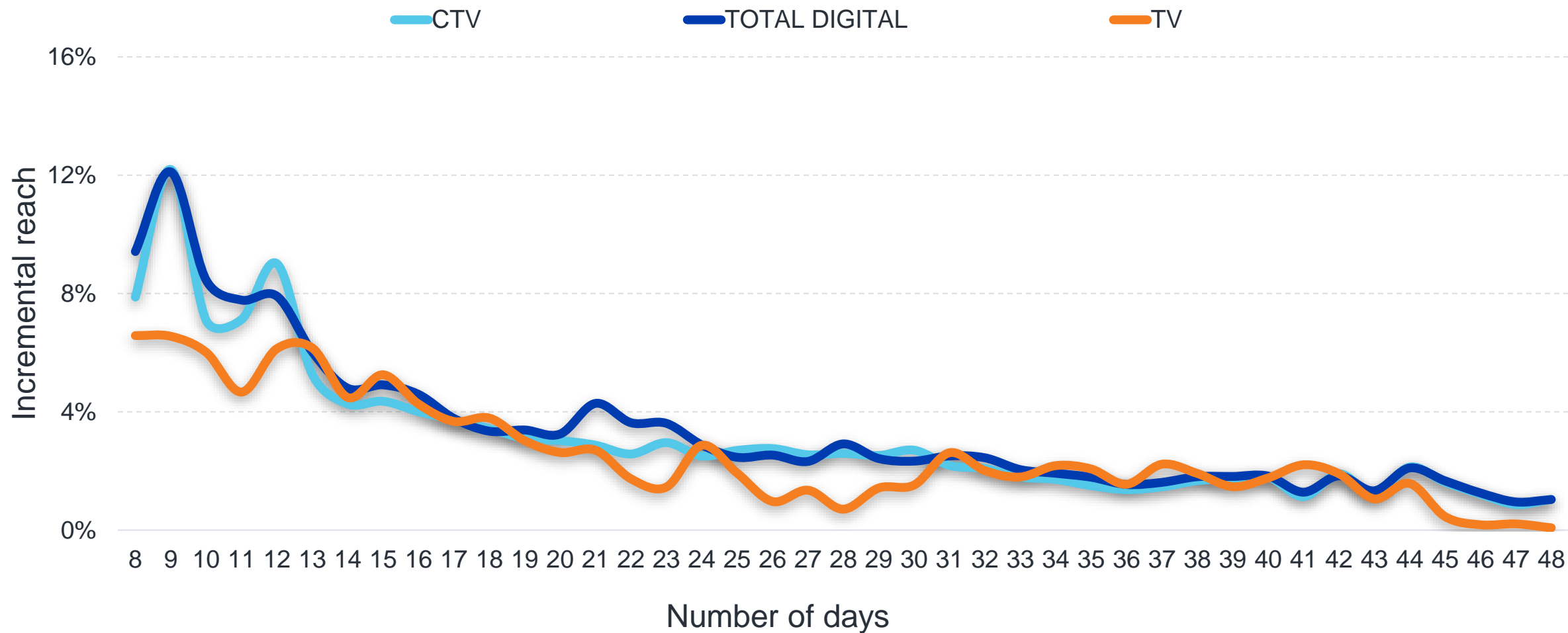
JANUARY 2020

JANUARY 2023

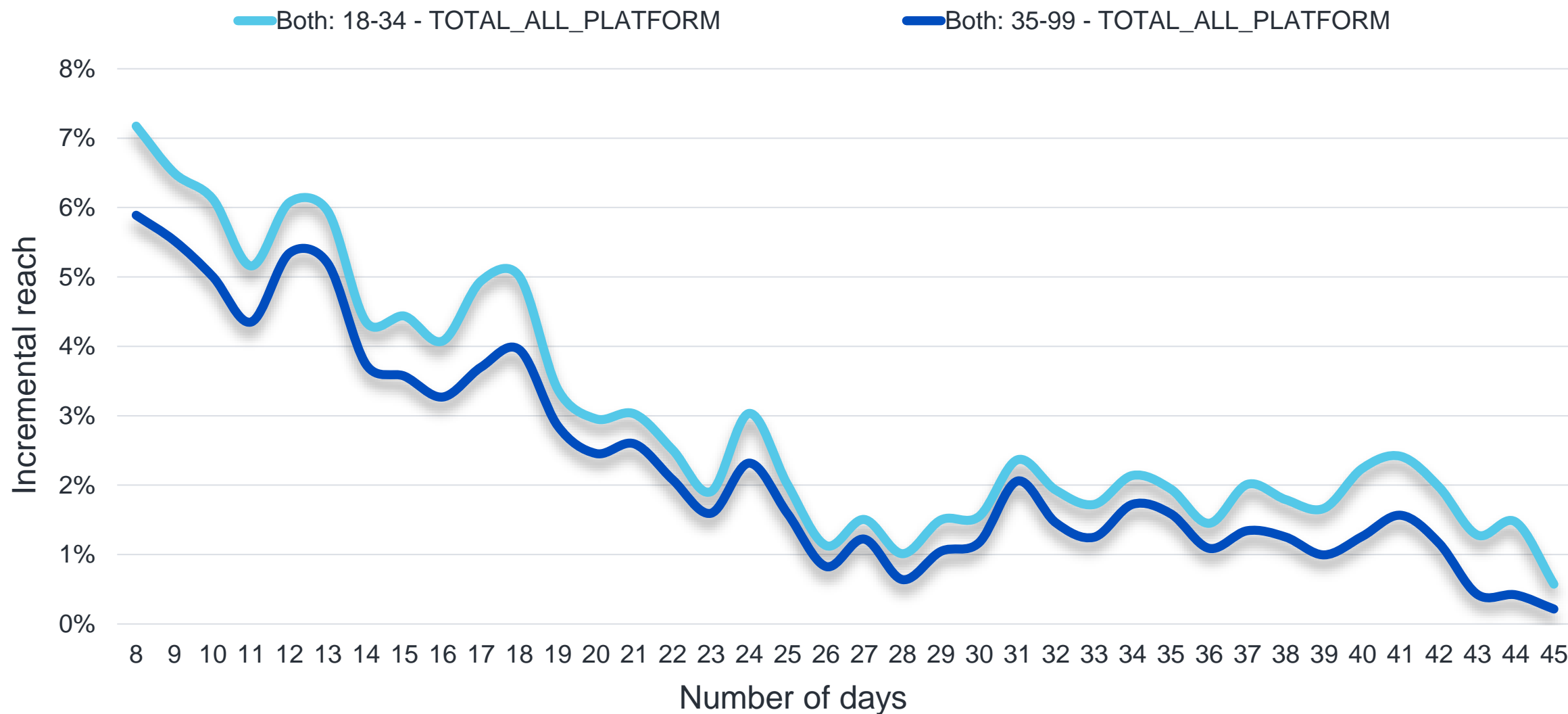


PAST 45 DAYS, INCREMENTAL LIFT IS NEGLIGEABLE

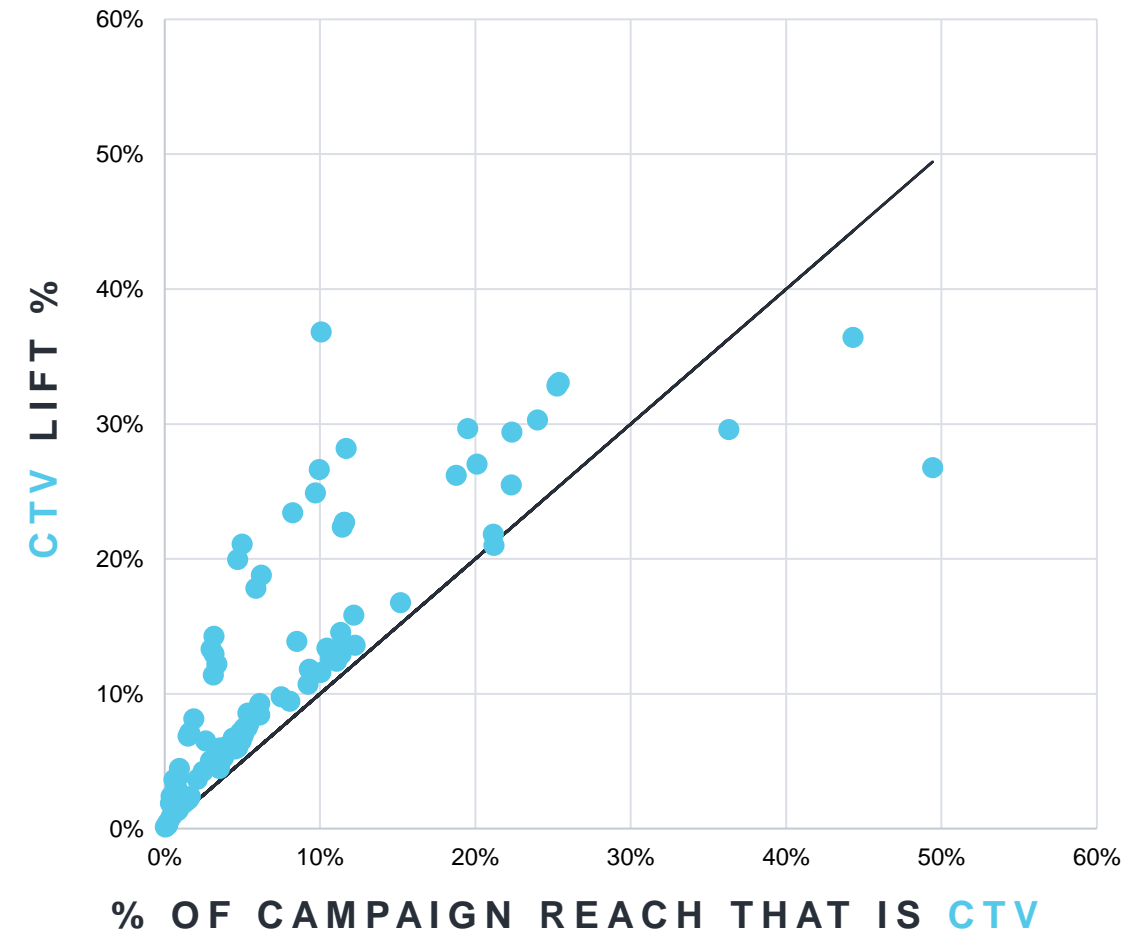
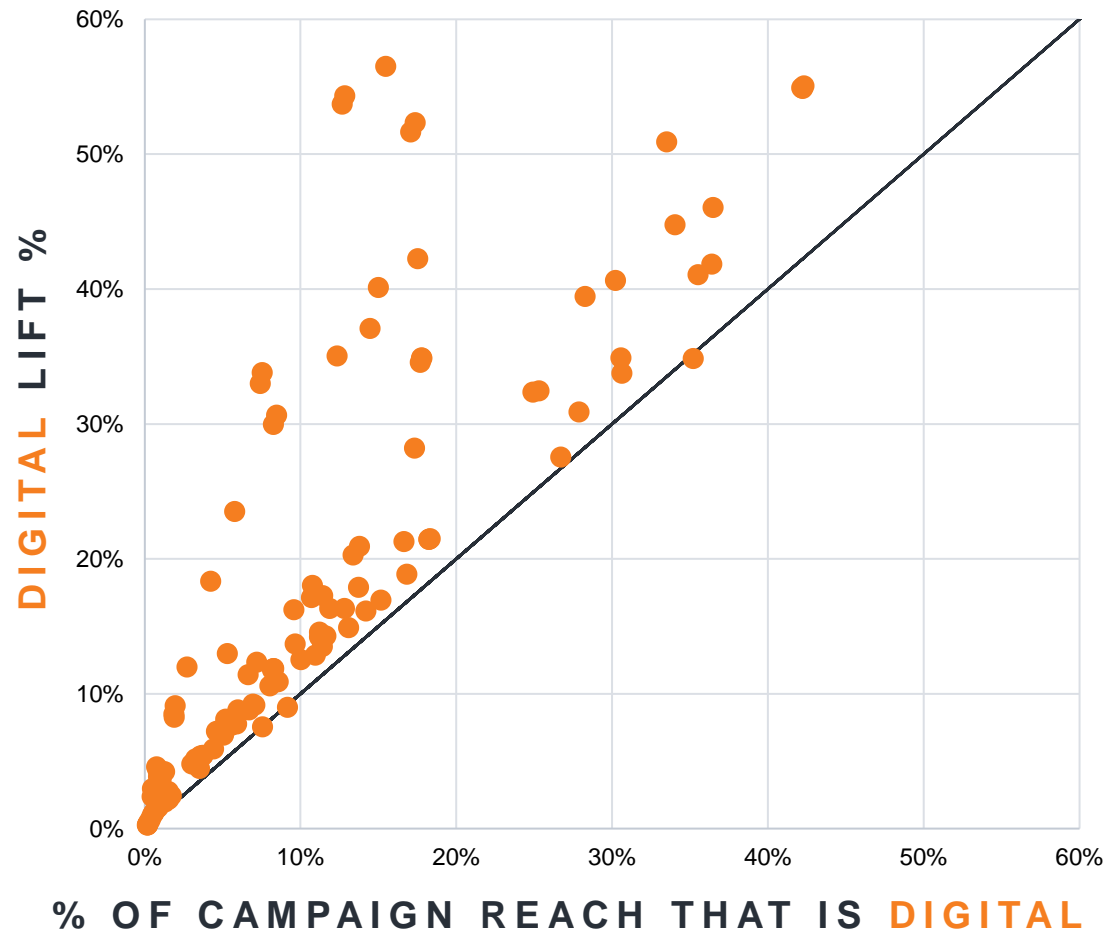
DAILY INCREMENTAL REACH FOR DAYS 8-48 (2-6 WEEKS VIEW), BY PLATFORM



18-34 VS 35+ INCREMENTALITY OVER THE COURSE OF A CAMPAIGN

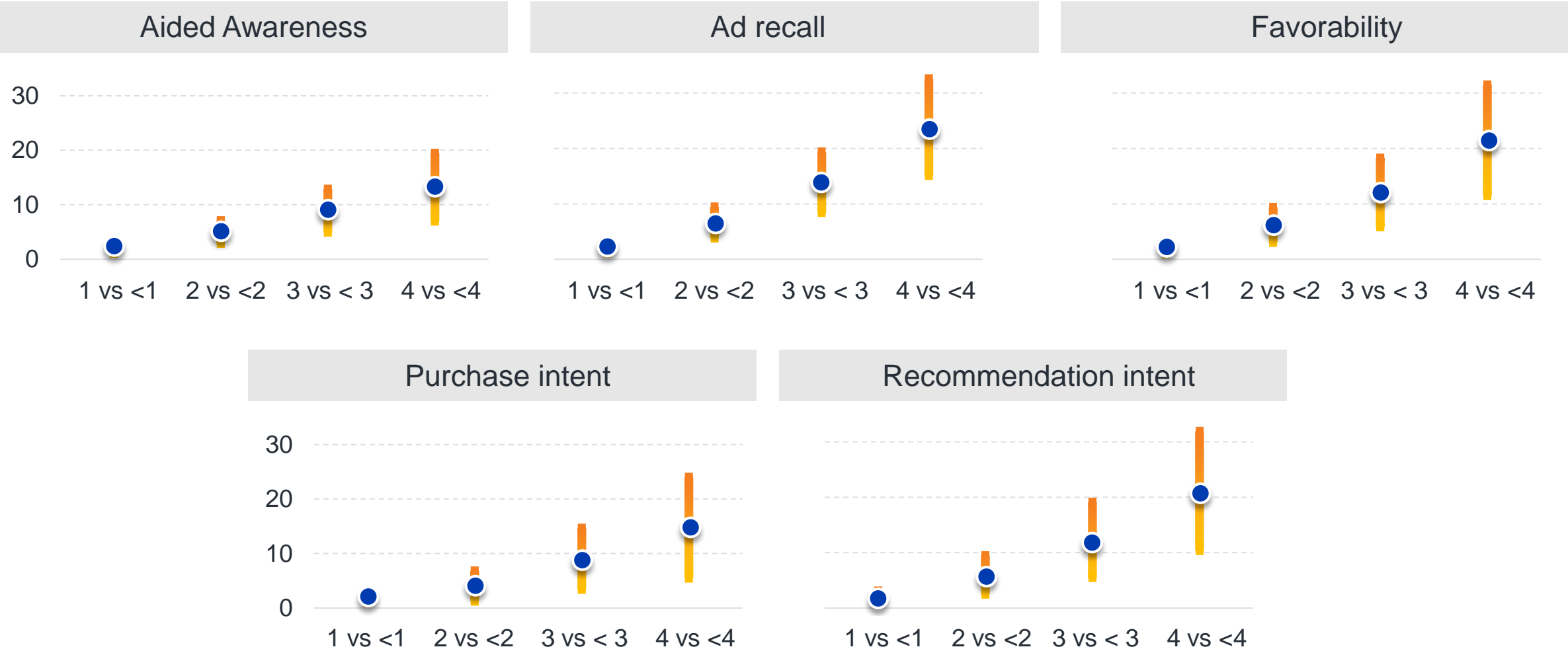


WHEN INCREASING REACH VS TV, DIGITAL AND CTV LIFT PUNCH ABOVE THEIR WEIGHT



ADDING SCREENS IMPROVES BRAND LIFT.
BUT VARIABILITY OF RESULTS ALSO INCREASES.

Predicted average % point lift (Helmert contrasts)



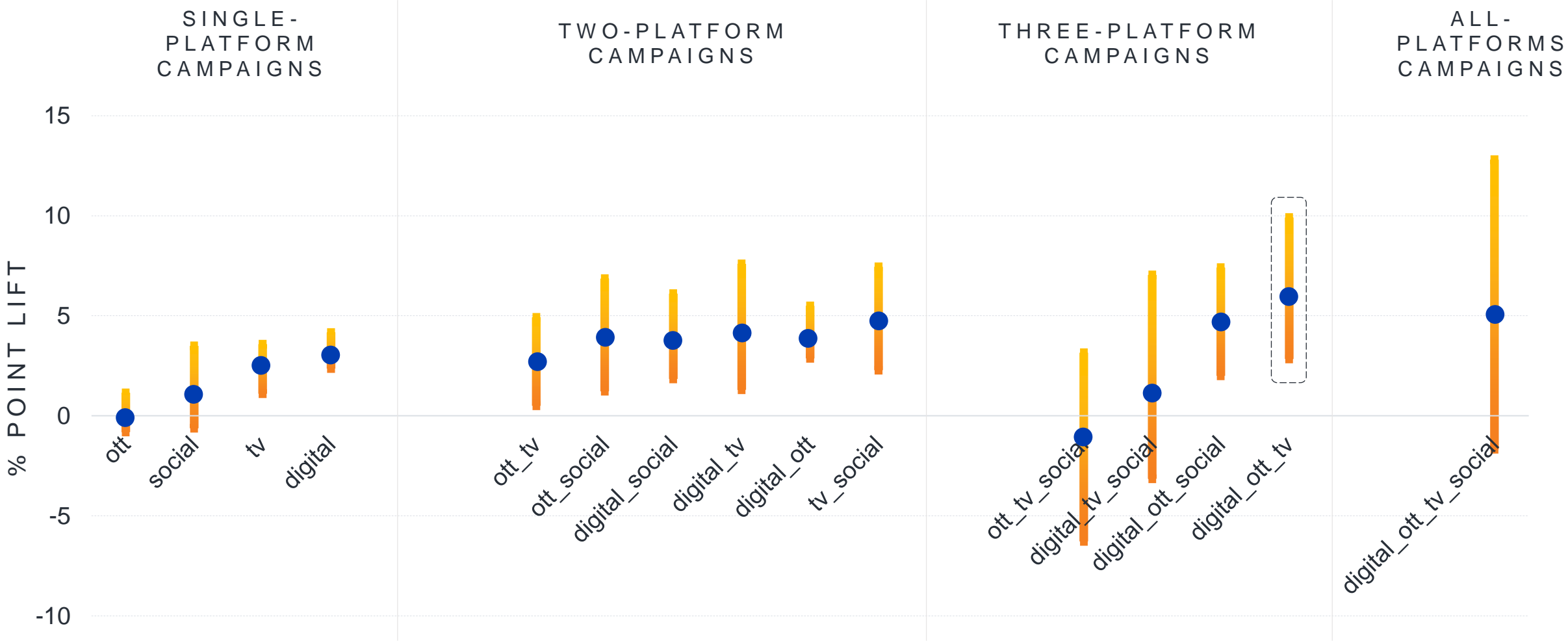
THIS TIME, WITHOUT SOCIAL MEDIA

Predicted average % point lift when excluding social media (Helmert contrasts)



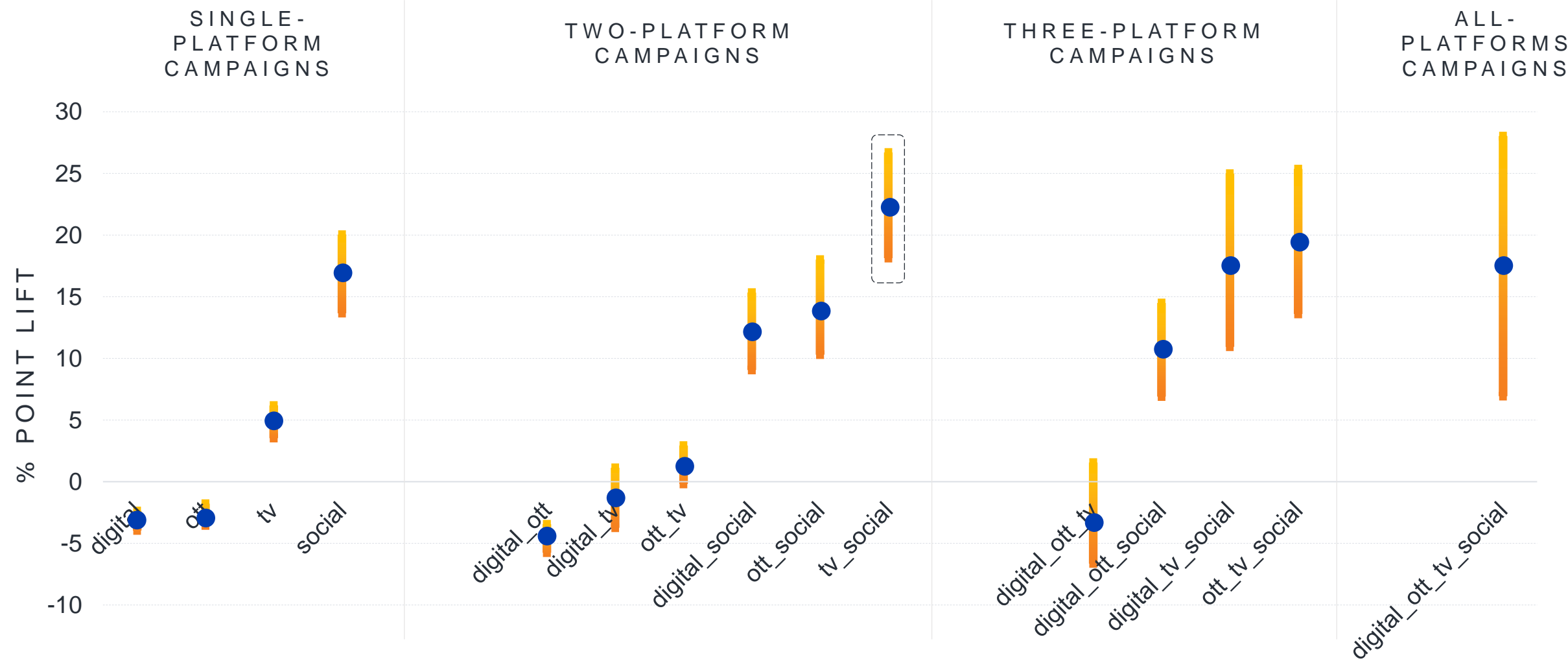
MULTI-SCREEN CAMPAIGNS PERFORM BETTER THAN SINGLE-PLATFORM CAMPAIGNS.
BUT VARIABILITY OF RESULTS INCREASES WITH THE NUMBER OF PLATFORMS.

Example 1: % point lift of **Aided Awareness**, by platform mix






WE SEE A SIMILAR PATTERN WITH AD RECALL AND OTHER VARIABLES SUCH AS FAVORABILITY, PURCHASE RECOMMENDATION, OR RECOMMENDATION INTENT

Example 2: % point lift of **Ad Recall**, by platform mix



















... OPTIMAL PLATFORM MIX DEPENDS ON THE TARGET AUDIENCE

Table below shows how average Aided Awareness lift increases when adding platforms.

	18 to 34	Total Pop
 TV	6.0	2.4
 TV + DIGITAL	15.8	4.1
 TV + DIGITAL + OTT	17.4	6.3





















OPTIMIZING THE PLATFORM MIX DEPENDS ON THE OBJECTIVES OF THE CAMPAIGN
TV FEATURES SOLIDLY IN OPTIMIZED CONFIGURATIONS

PLATFORM MIX THAT MAXIMIZES LIFT, BY TYPE OF LIFT

	DIGITAL	SOCIAL	TV	CTV	AVERAGE % POINT LIFT
Aided Awareness					6.3
Ad Recall					22.8
Favorability					18.8
Recommendation intent					20.0

FOR **PURCHASE INTENT**, SEVERAL PLATFORM MIXES NEARLY MAXIMIZED LIFT

PLATFORM MIX THAT MAXIMIZES LIFT, BY TYPE OF LIFT

	DIGITAL	SOCIAL	TV	CTV	AVERAGE % POINT LIFT
TV + Social					10.1
OTT + Social					10.6
OTT + TV + Social					11.4
Digital + TV + Social					11.5
Digital + OTT + Social					11.6

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Thank you!

Tania Yuki

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