

ADVERTISING TO GEN



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AGENDA

1

The New State
of Content
Consumption

2

Driving
Engagement
Through Audience
Relevance

3

When Formats
Collide

4

Key
Takeaways



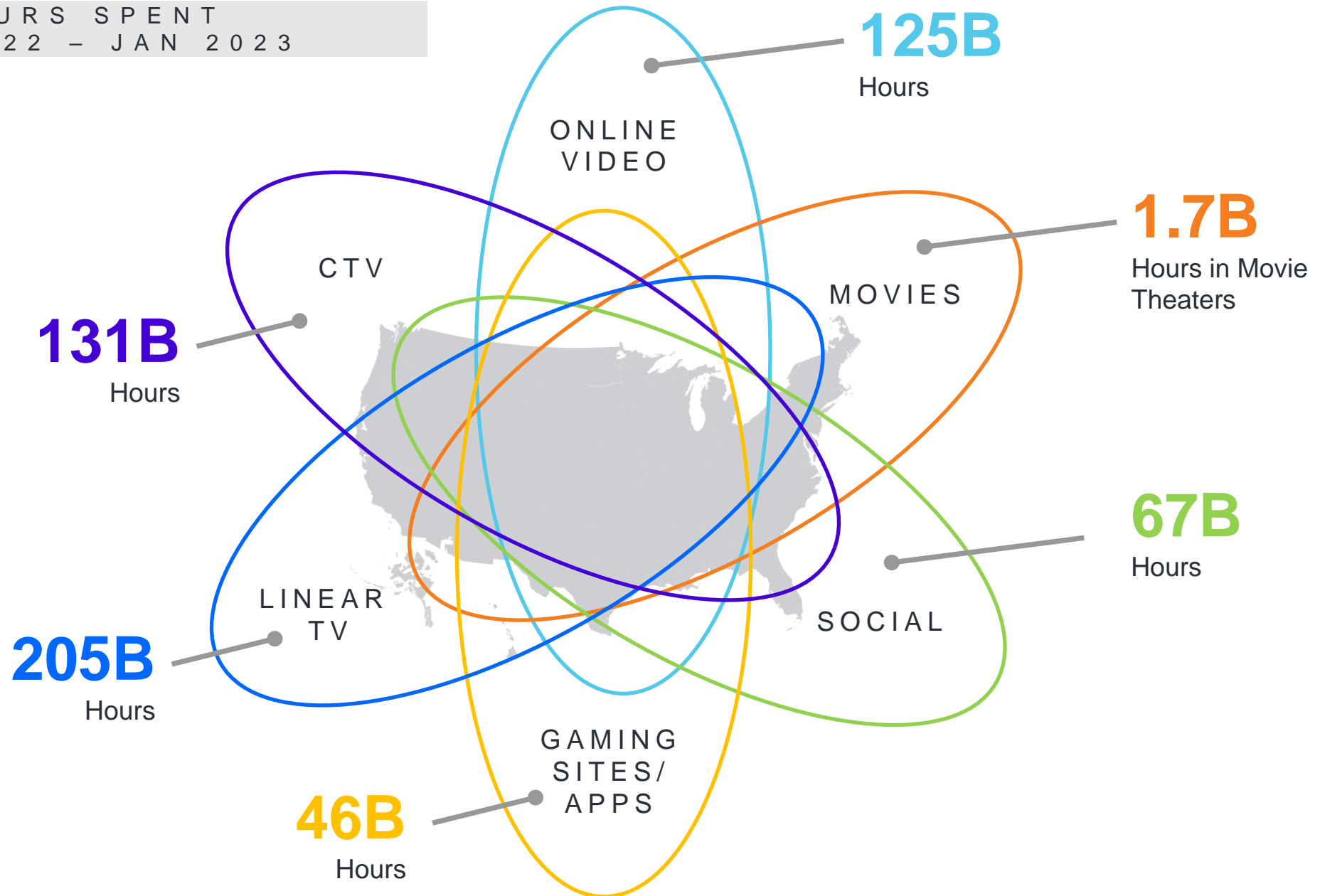
PART I

The New State of Content Consumption



ADVERTISING TO
GEN Z

HOURS SPENT
JAN 2022 – JAN 2023

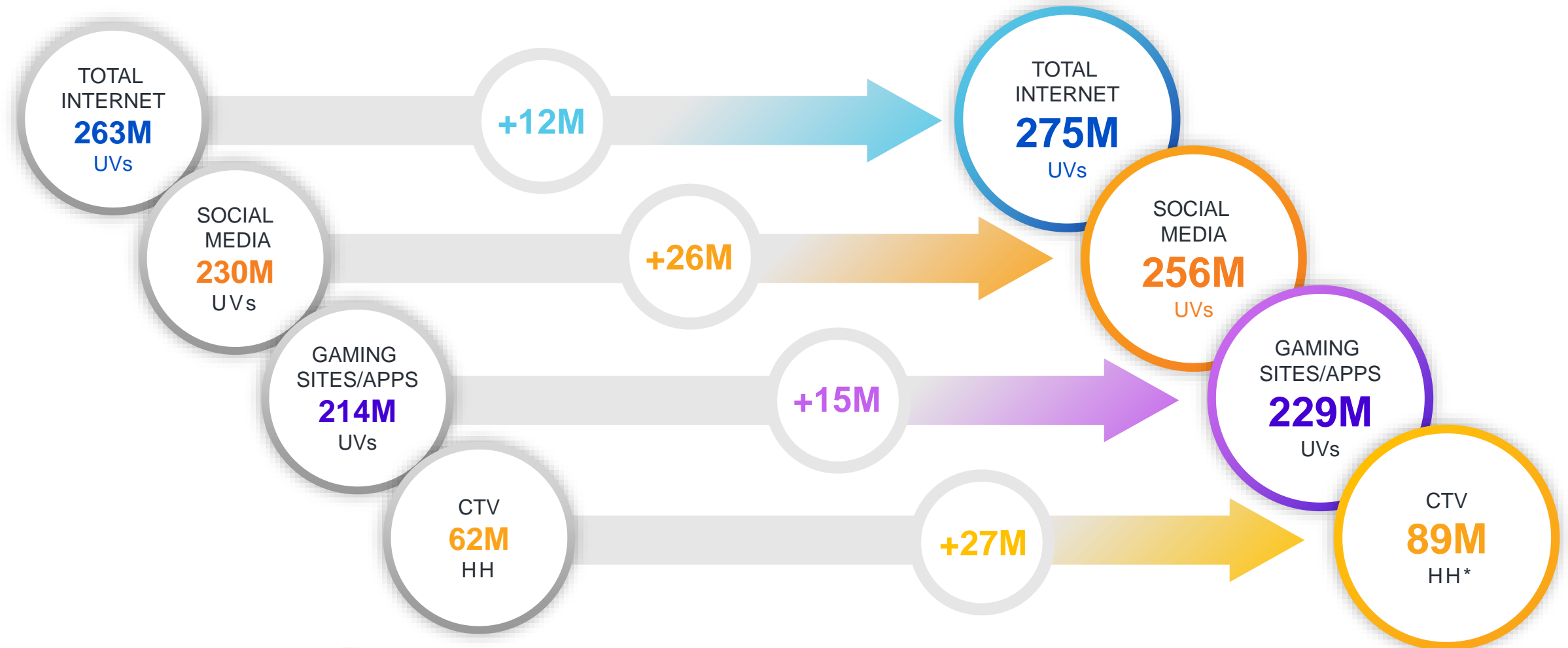


MORE CONTENT IS CREATED AND CONSUMED THAN EVER BEFORE, TO LARGER AUDIENCES

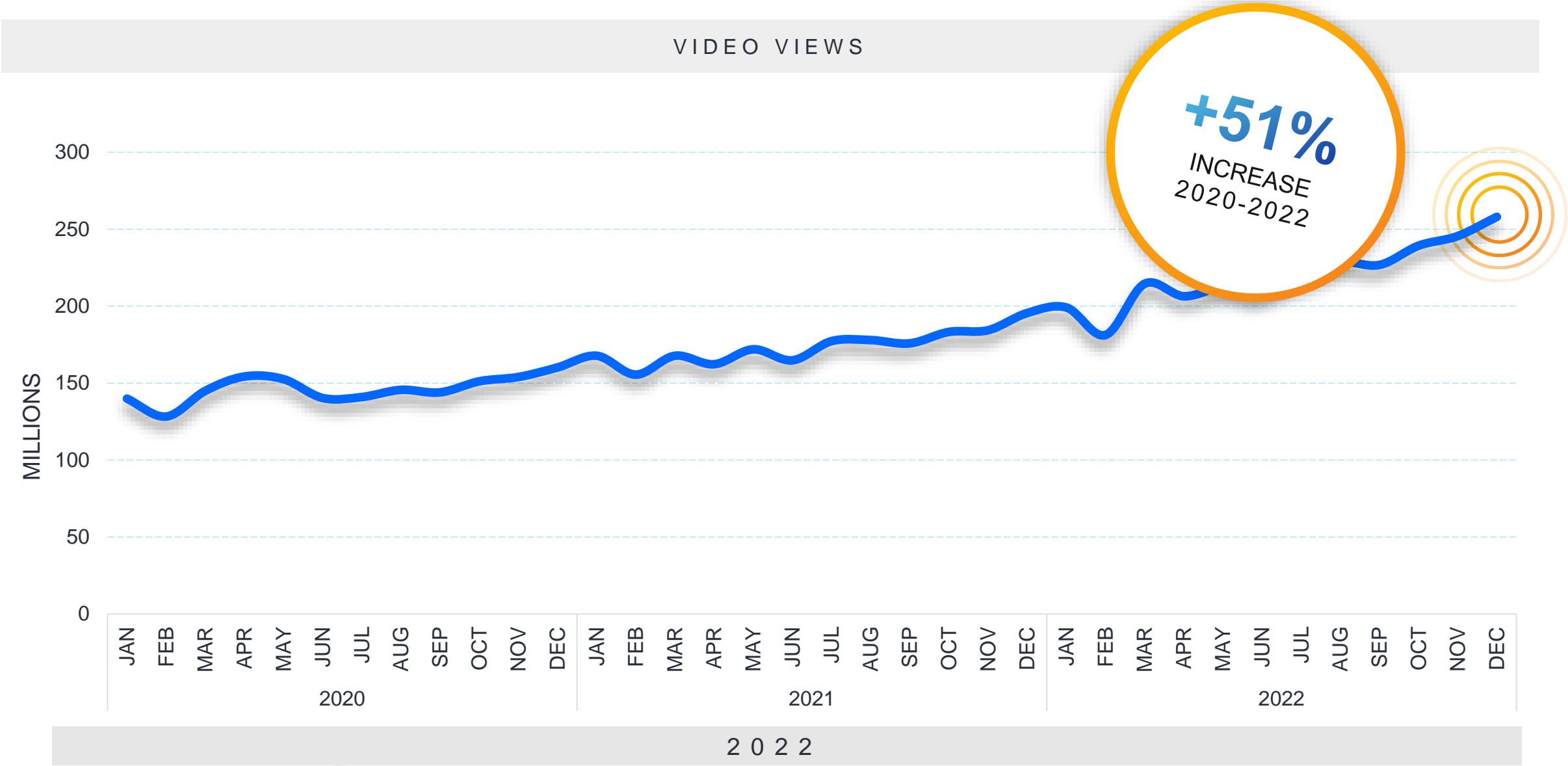
UNIQUE VISITORS ACROSS SOCIAL MEDIA AND TOTAL INTERNET

DECEMBER 2019

DECEMBER 2022



ONLINE VIDEO CONSUMPTION CONTINUES ON ITS GROWTH TRAJECTORY



SHORT FORM VIDEO ALSO CONTINUES TO RISE

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

+91%

ACTIONS
2021-2022



Reels

+95%

ACTIONS
2021-2022



TikTok

+70%

LIKES
2021-2022



Shorts



PART II

Driving Engagement Through Audience Relevance



GEN Z AUDIENCE PERSONA ON DIGITAL

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

OPEN TO NEW BRANDS

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

16% purchased brands they grew up with

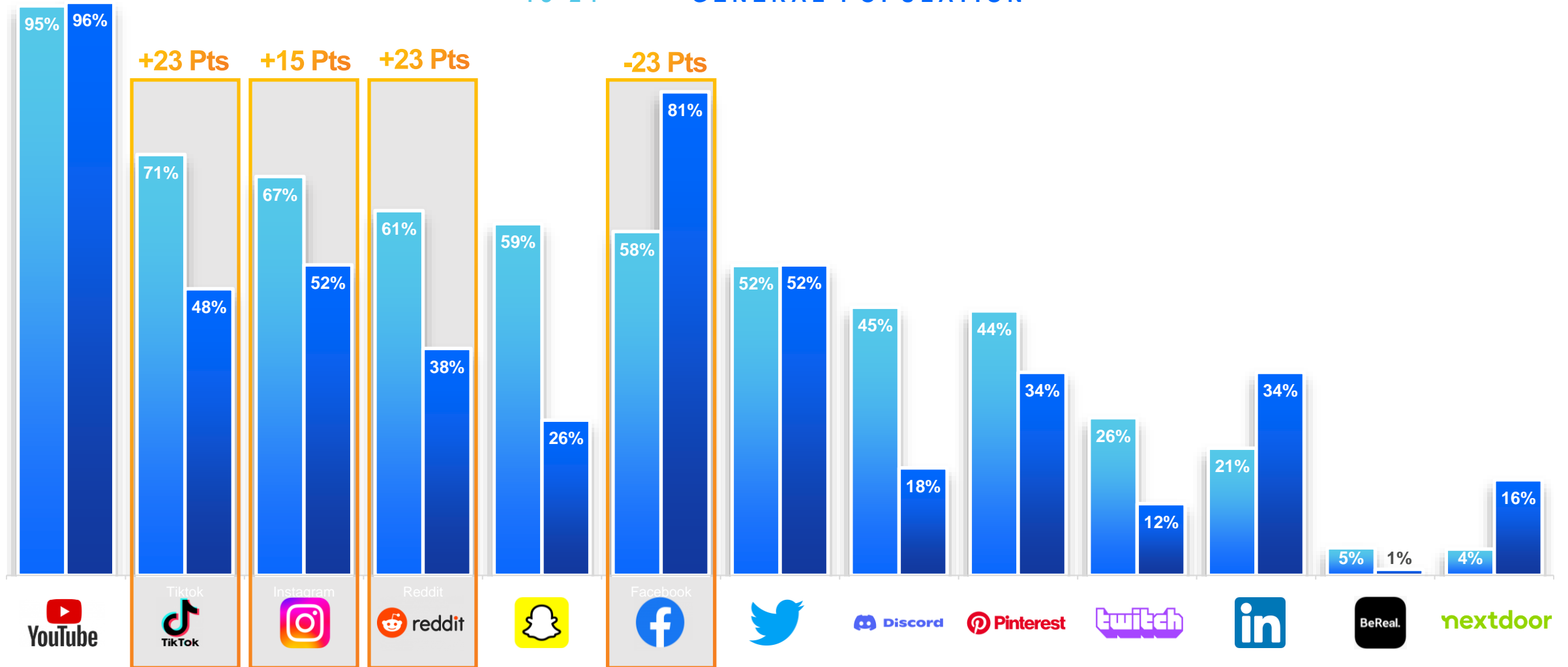
GAMING ENTHUSIASTS

86% are interested in various topics related to video gaming

SO HOW DO WE REACH THE GEN-Z COHORT?

Their Social Media habits are quite different – and reaching them requires brands to leverage a unique approach

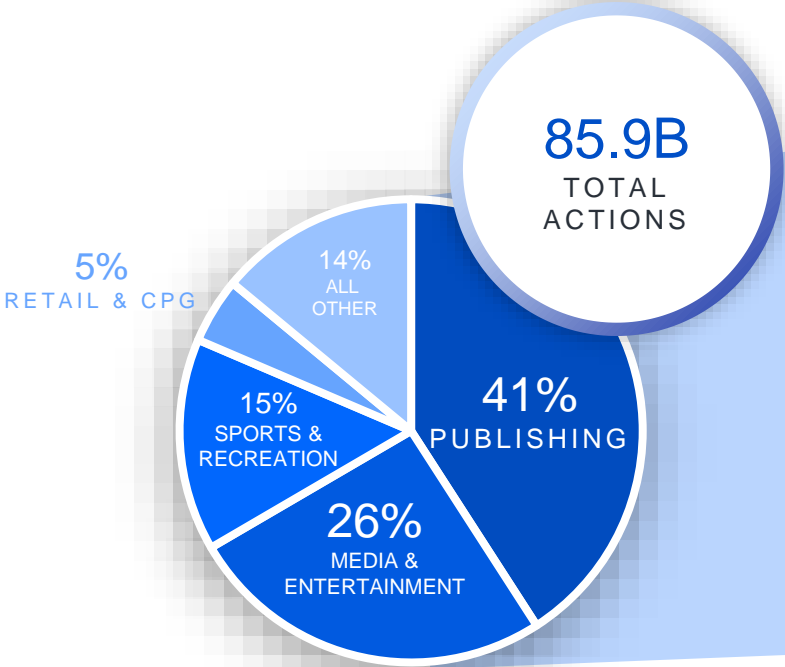
18-24 GENERAL POPULATION



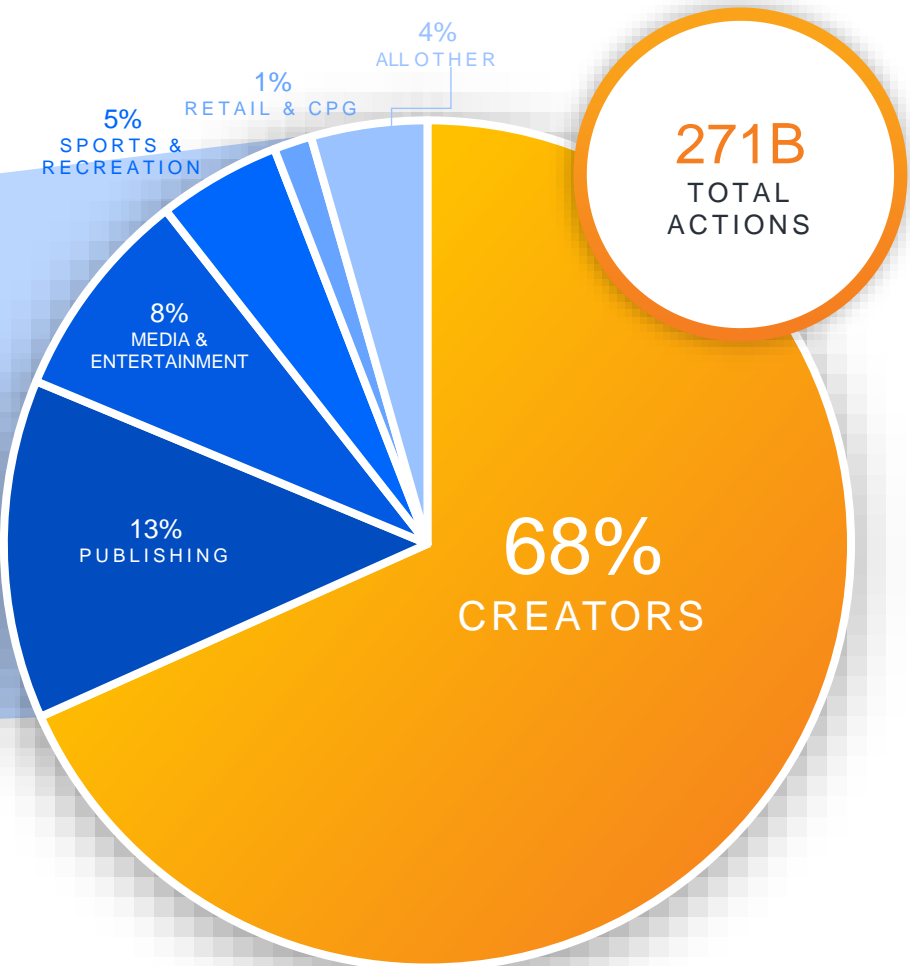
CREATORS DROVE HUGE ENGAGEMENT LEVELS IN 2022

SHARE OF ENGAGEMENT BY CATEGORY

US BRAND ENGAGEMENT ACROSS SOCIAL MEDIA



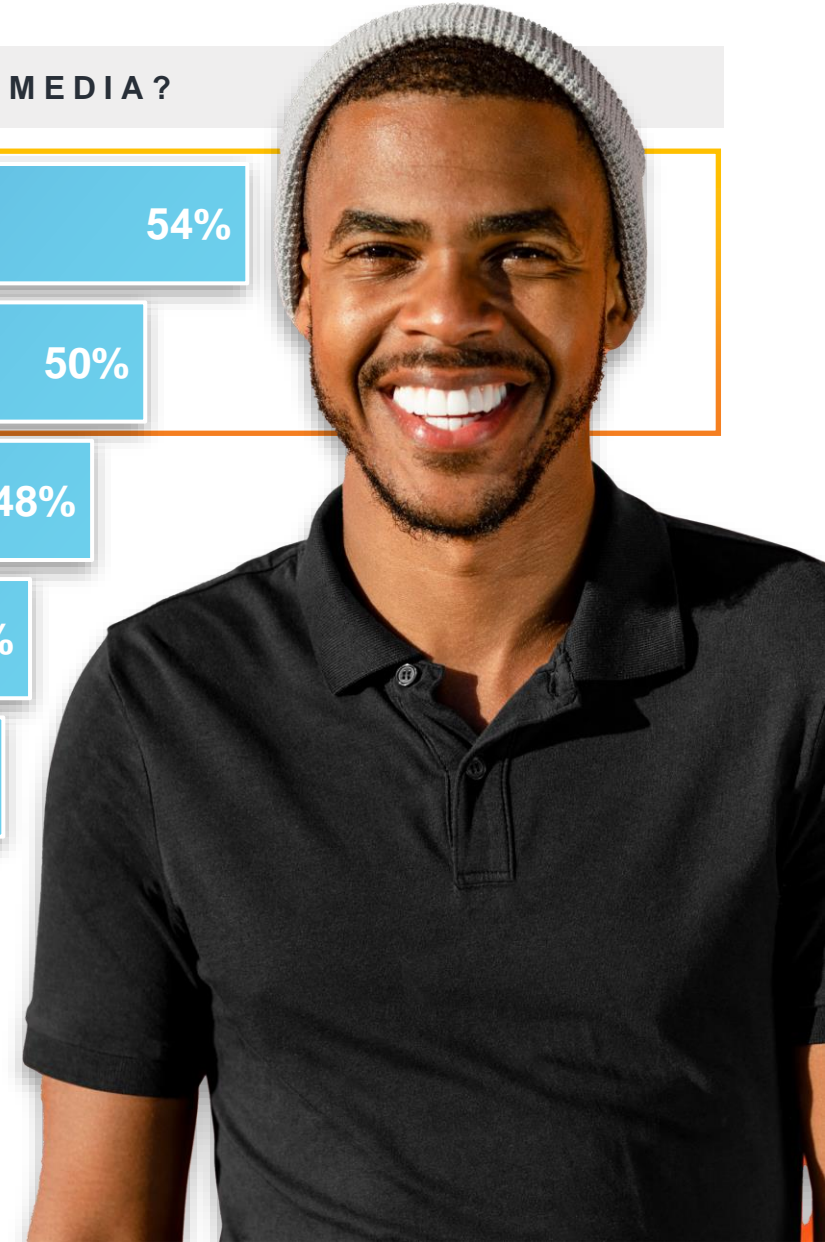
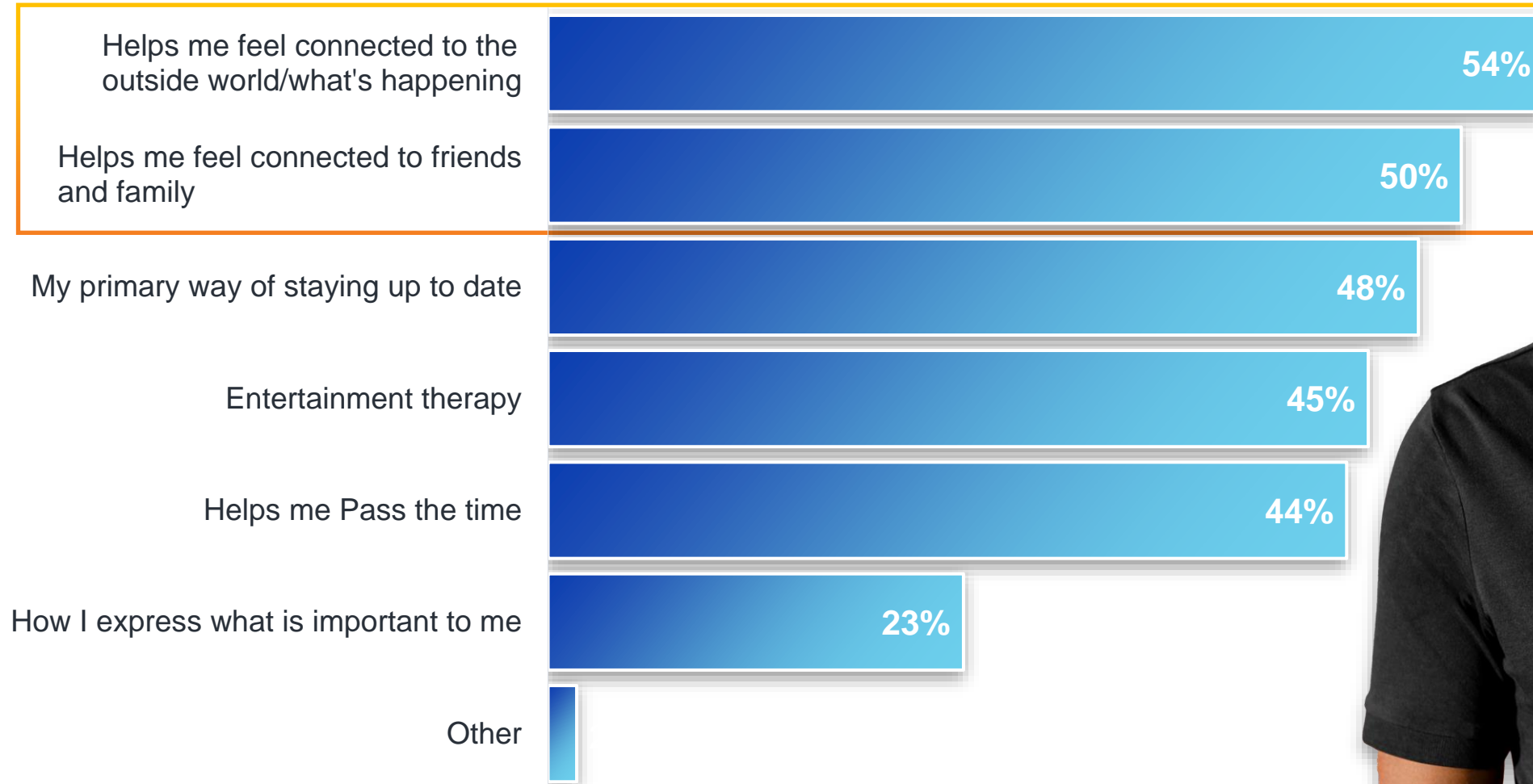
CREATOR-DRIVEN CONTENT ON SOCIAL



AND WHAT IS IT ABOUT INFLUENCERS?

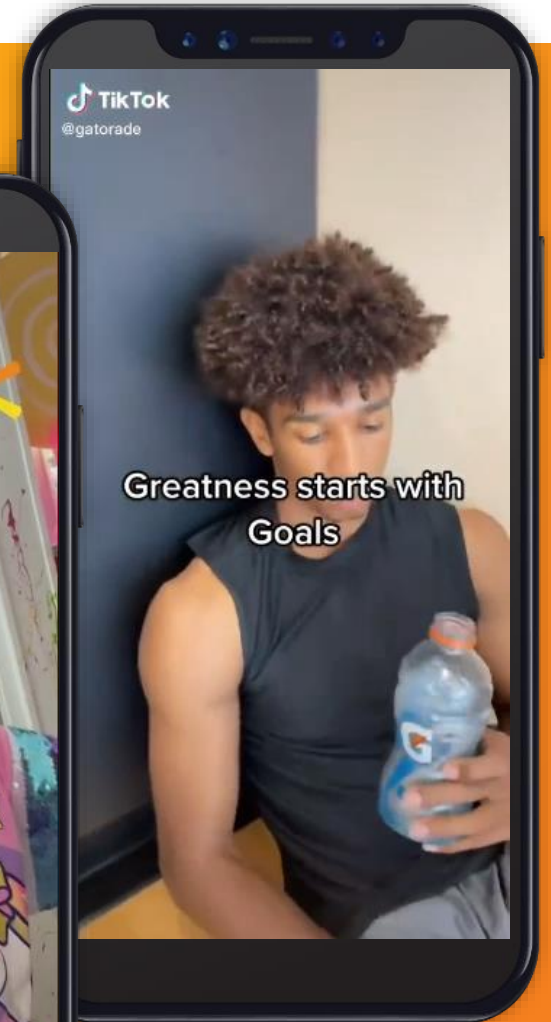
WELL IT ALL GOES BACK TO WHY WE ARE ON SOCIAL – PEOPLE ENGAGE WITH PEOPLE...

WHAT IS DRIVING YOUR TIME SPENT ON SOCIAL MEDIA?

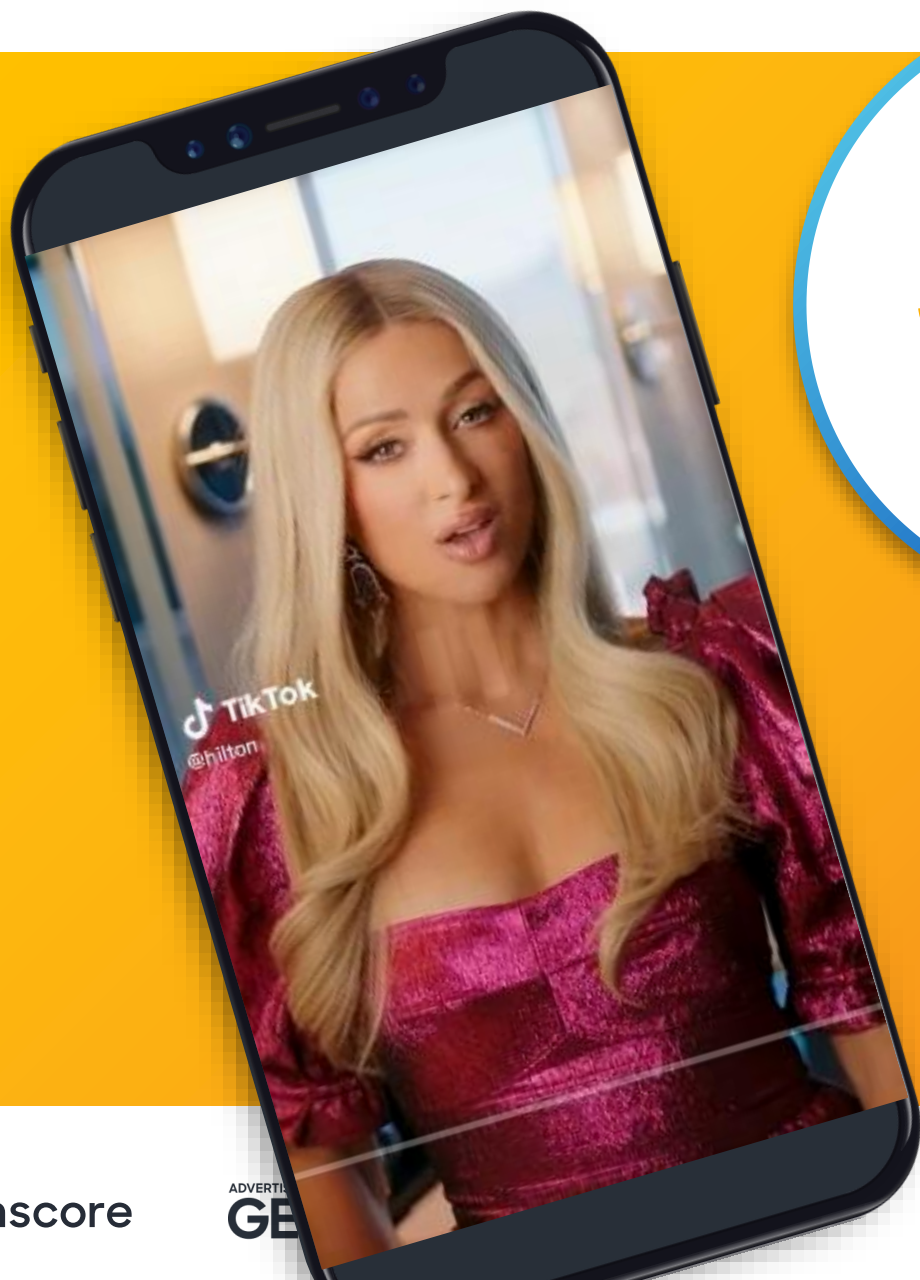


Authenticity is KEY.
Content, especially
content containing ads,
needs to feel native.

Audiences are more
fault tolerant on
production value for a
fast turnaround on
relevant content.



SHORT-FORM ENTERTAINMENT AND LONG-FORM CONTENT COLLIDE



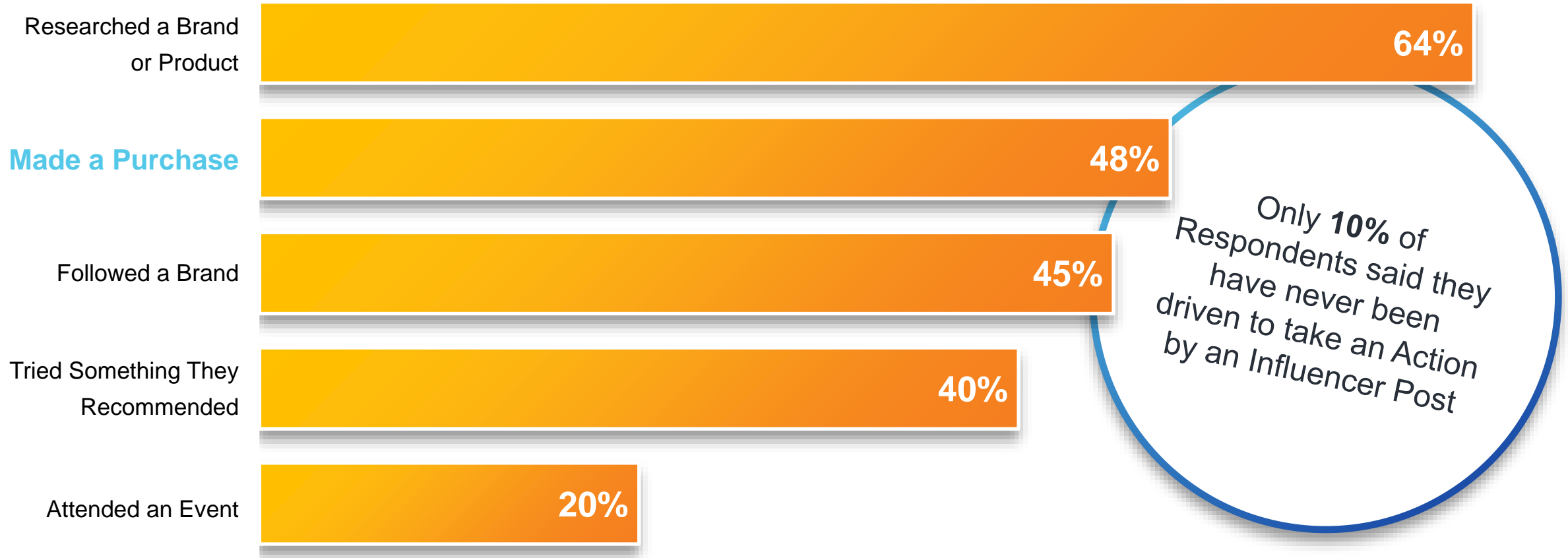
35M
VIEWS

86X
MORE VIEWS VS
AVERAGE US BRAND
ON TIKTOK

877X
MORE VIEWS VS
TRAVEL CATEGORY
ON TIKTOK

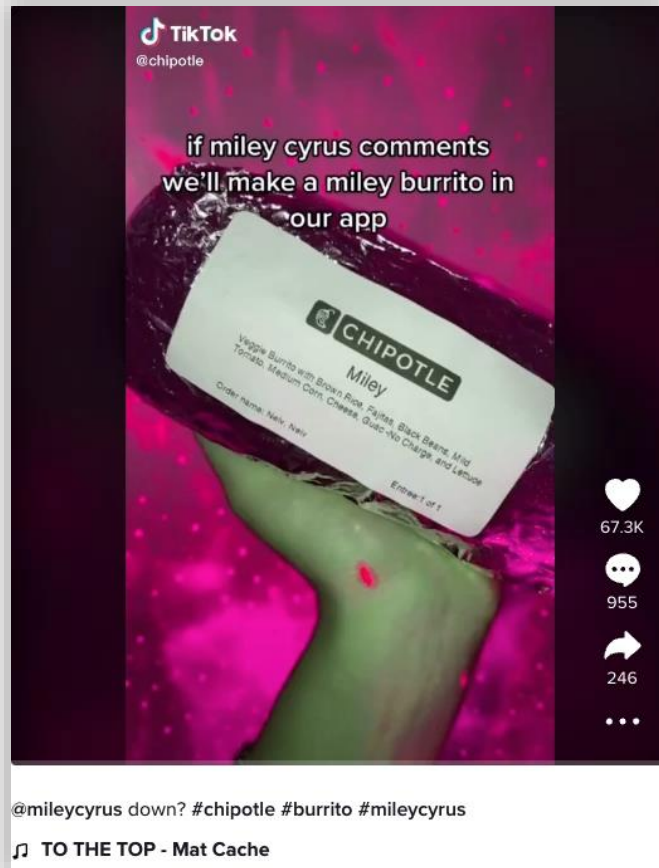
AND THIS CARRIES THROUGH IN DRIVING CONVERSION. ALMOST HALF OF ALL 18-24 YEAR OLDS SURVEYED MADE A PURCHASE BASED ON INFLUENCER RECOMMENDATION

As a result of viewing or interacting with Influencer posts on social media, did you take or were you motivated to take any follow-up action online or offline?
Select all that apply.

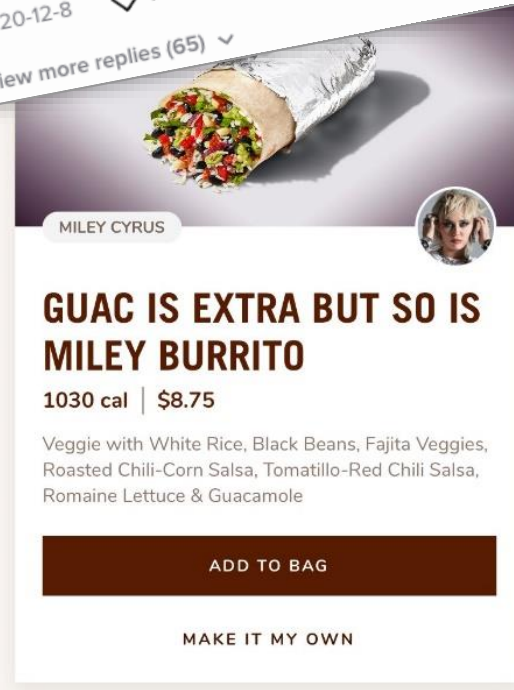


LET'S TAKE A REAL EXAMPLE OF HOW THIS CAME TO LIFE FOR A BRAND

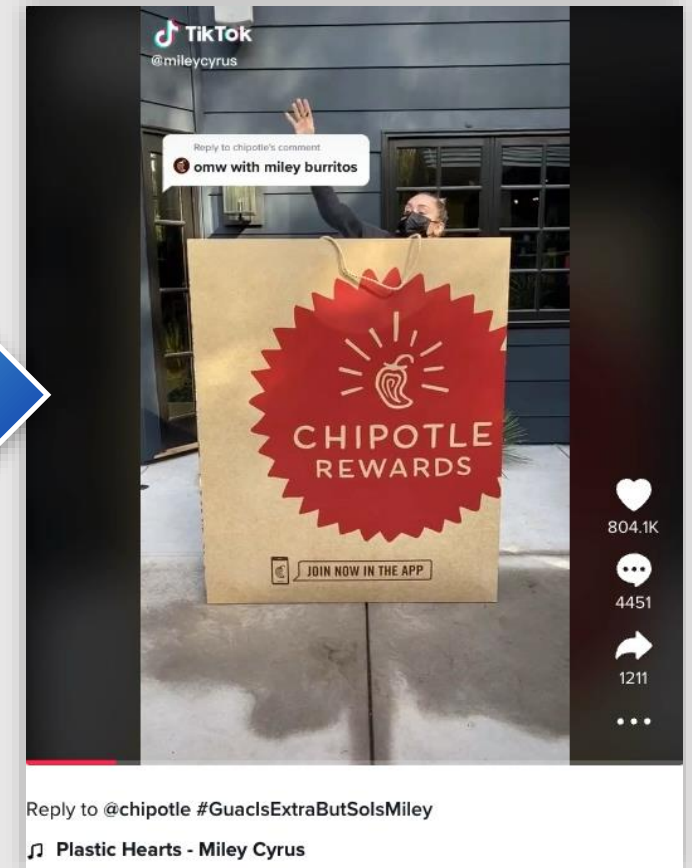
It starts off with a TikTok call-to-action...



...continues with some star-studded influencer engagement



...and ends with a product activation at point-of-sale





ALIX ASHLEY EARLE

77%

of the 18-24 cohort
who visited TikTok
in past month **also**
visited Amazon

50%

Percentage of her top trending posts from the past 90 days (IG, TT) relate to Amazon and her store front

2.1M

Number of actions over the last 90 days on 9 content pieces that mention the word "Amazon"

500M+

Number of views on TikTok *just* in December 2022

100%+

Follower growth on TikTok and Instagram



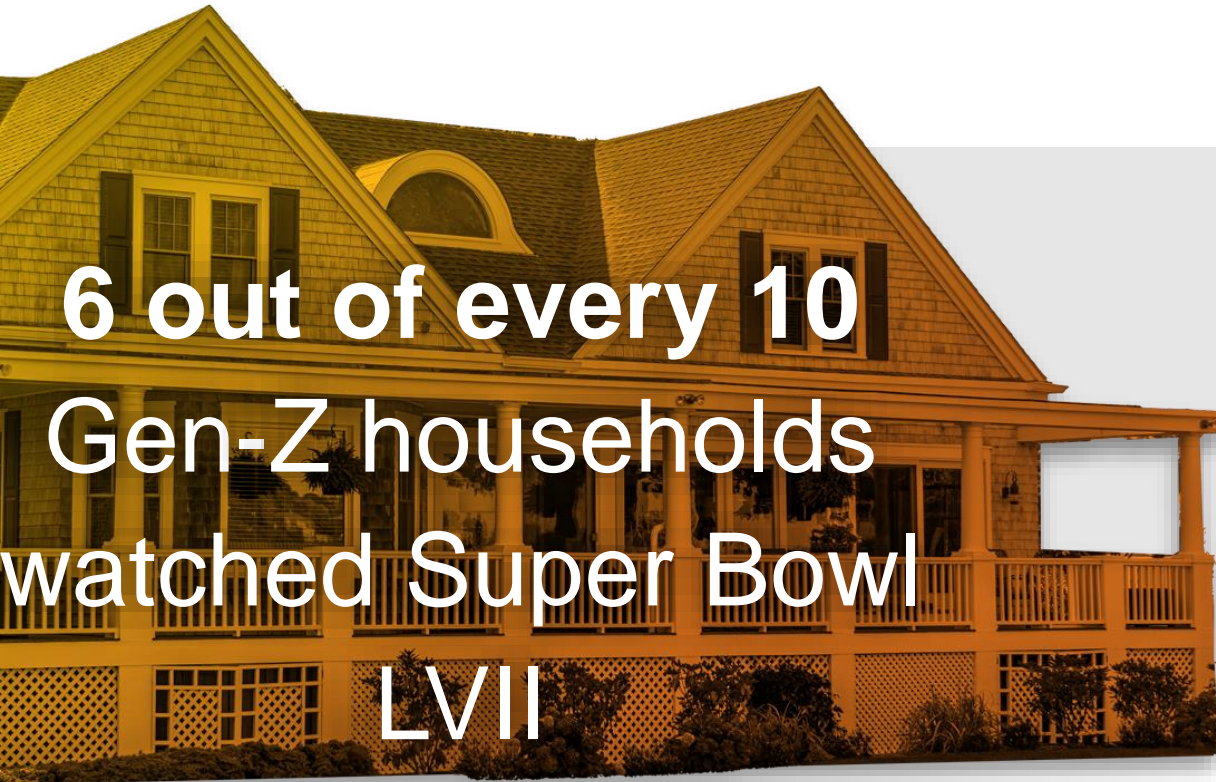
PART III

When Formats Collide

ADVERTISING TO
GEN Z



TENTPOLE SPORTS EVENTS DROVE VIEWERSHIP ON LINEAR...
SUPER BOWL LVII IS A PRIME EXAMPLE



6 out of every 10
Gen-Z households
watched Super Bowl
LVII

AVERAGE A18-24
AUDIENCE

9.6M

Households

THE GEN-Z GROUP
IS MORE LIKELY TO
WATCH THE
SUPERBOWL

105

Index vs Average
Program

TRENDS WE SEE:

YOUTUBE CTV DRIVES STRONGER INCREMENTAL REACH WITH THE GEN-Z COHORT

FORMAT MATTERS

**CTV remains strong during
tentpole Live events**

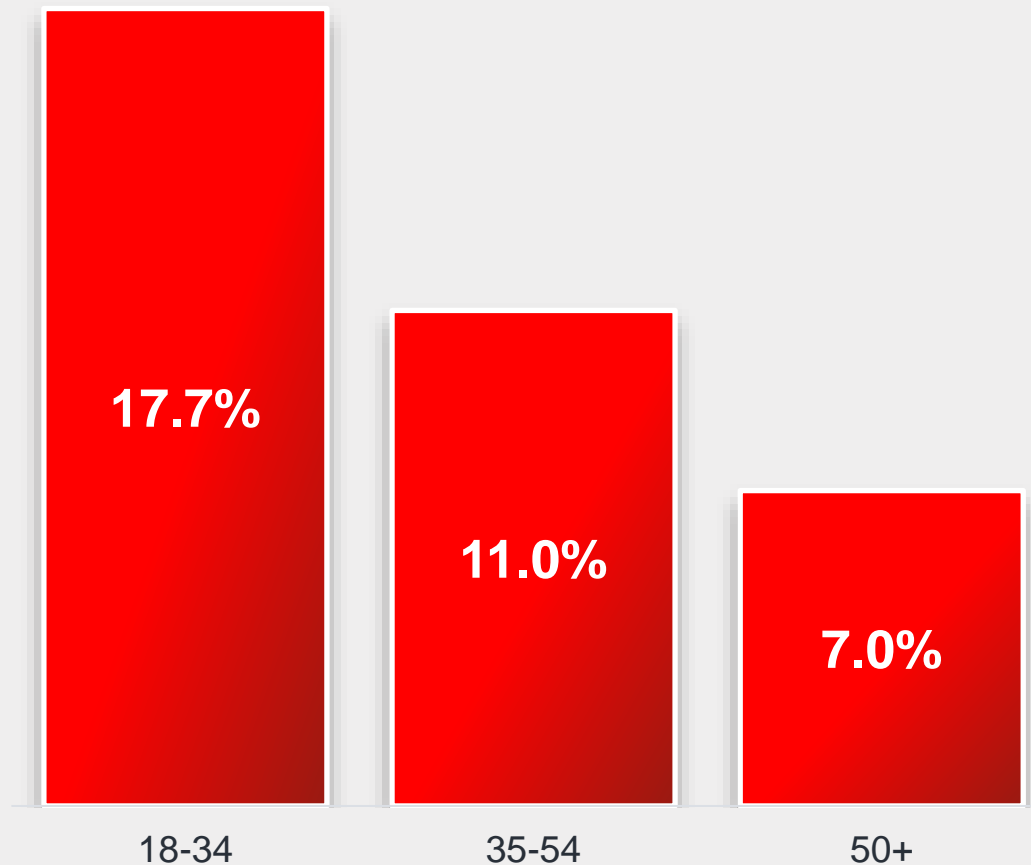
18% of the Gen-Z audience who saw a Super Bowl LVII ad ONLY saw it on YouTube CTV

DID YOU KNOW?

YouTube CTV reached 9.4M adults 18-34 who did not see a Super Bowl ad live on TV and expanded TV reach by 44%.

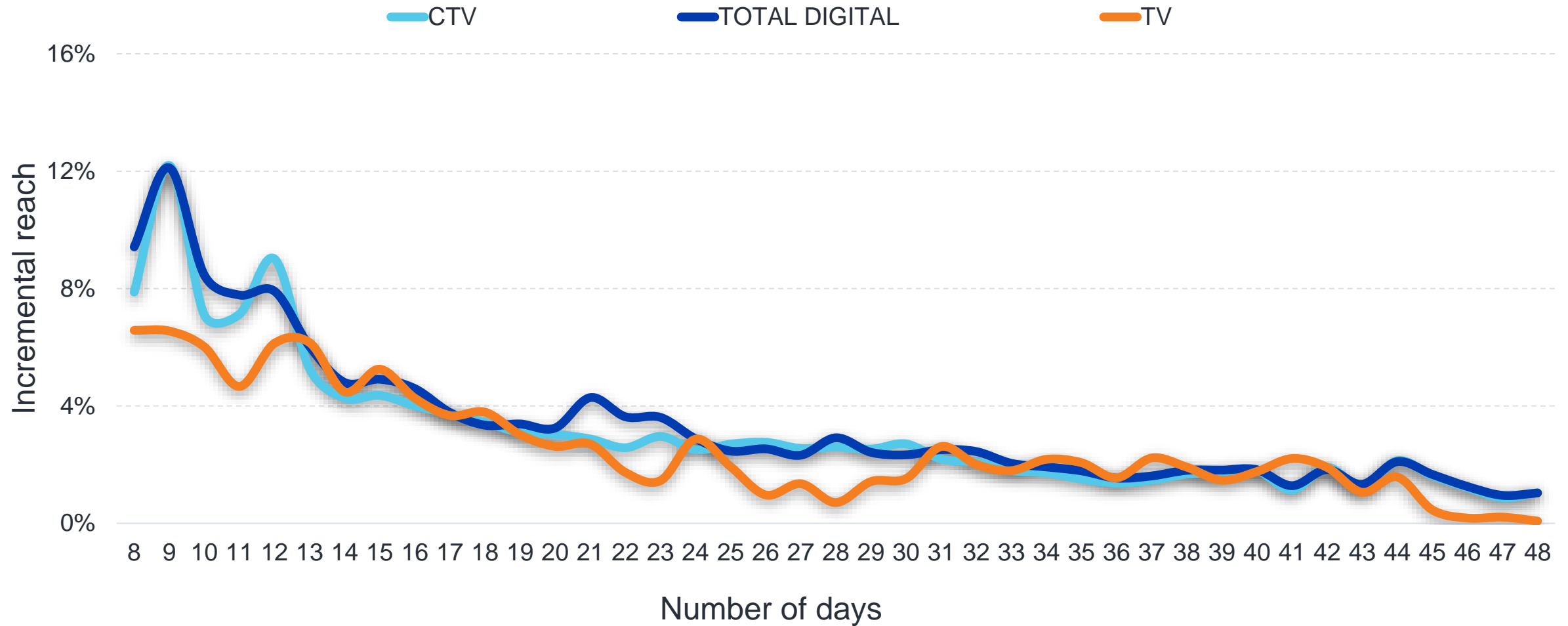


% WHO SAW A SUPER BOWL AD ON YOUTUBE CTV AND NOT ON LINEAR TV

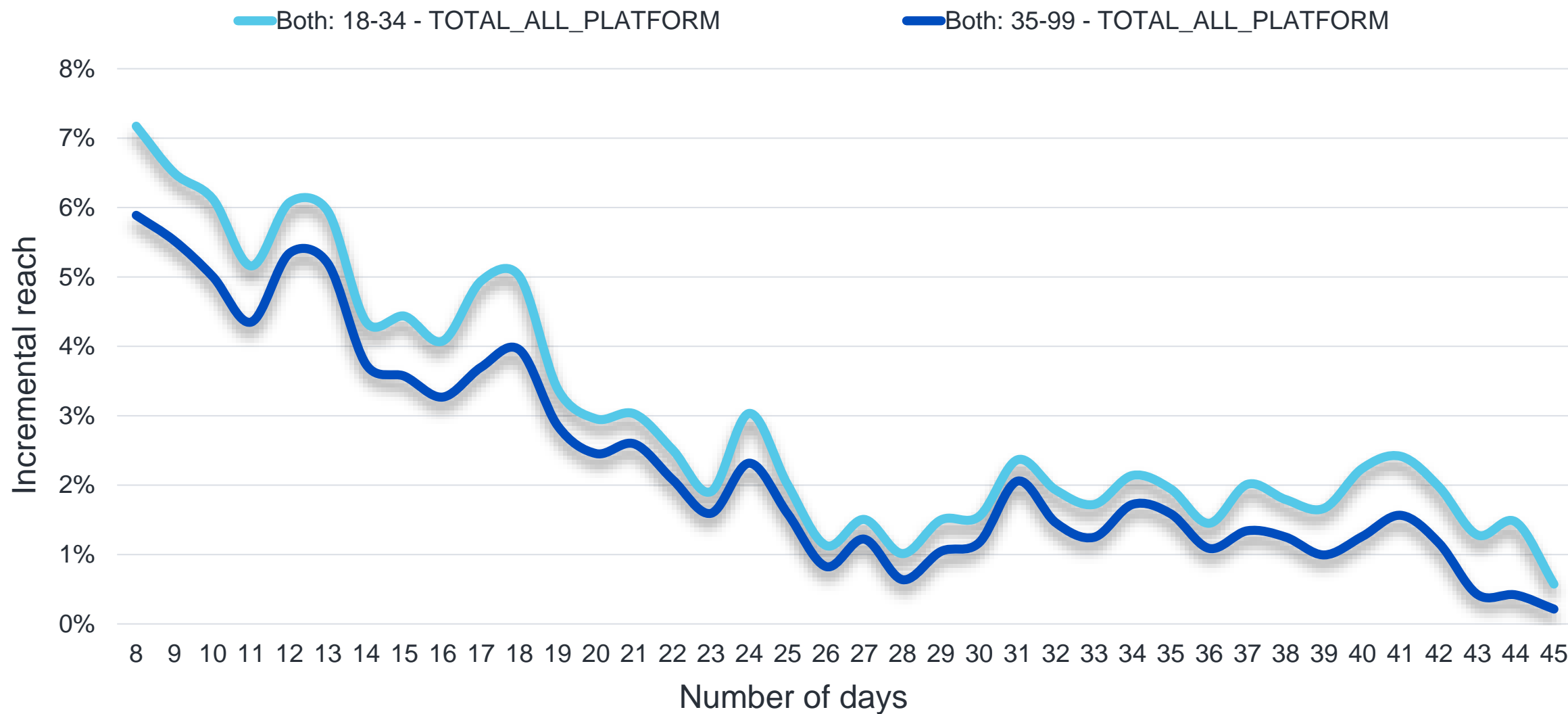


PAST 45 DAYS, INCREMENTAL LIFT IS NEGLIGEABLE

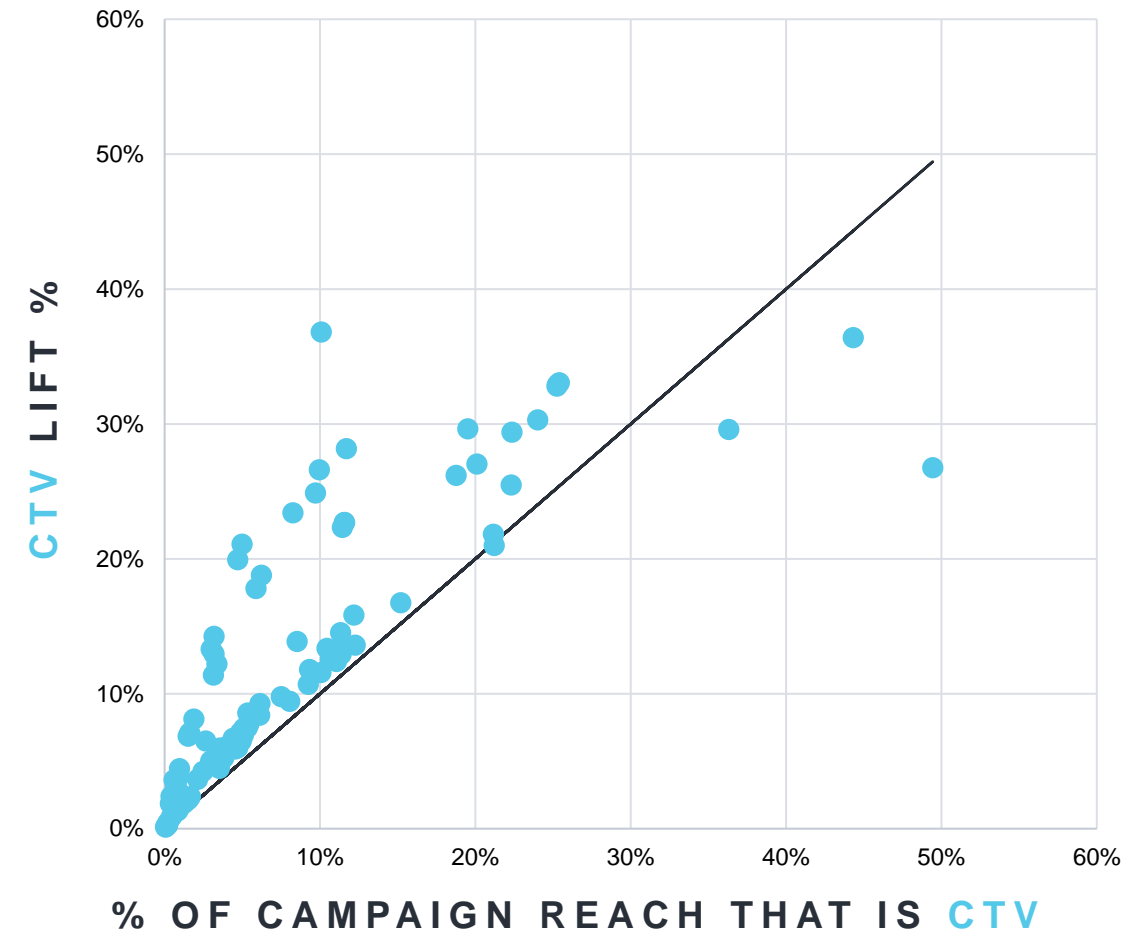
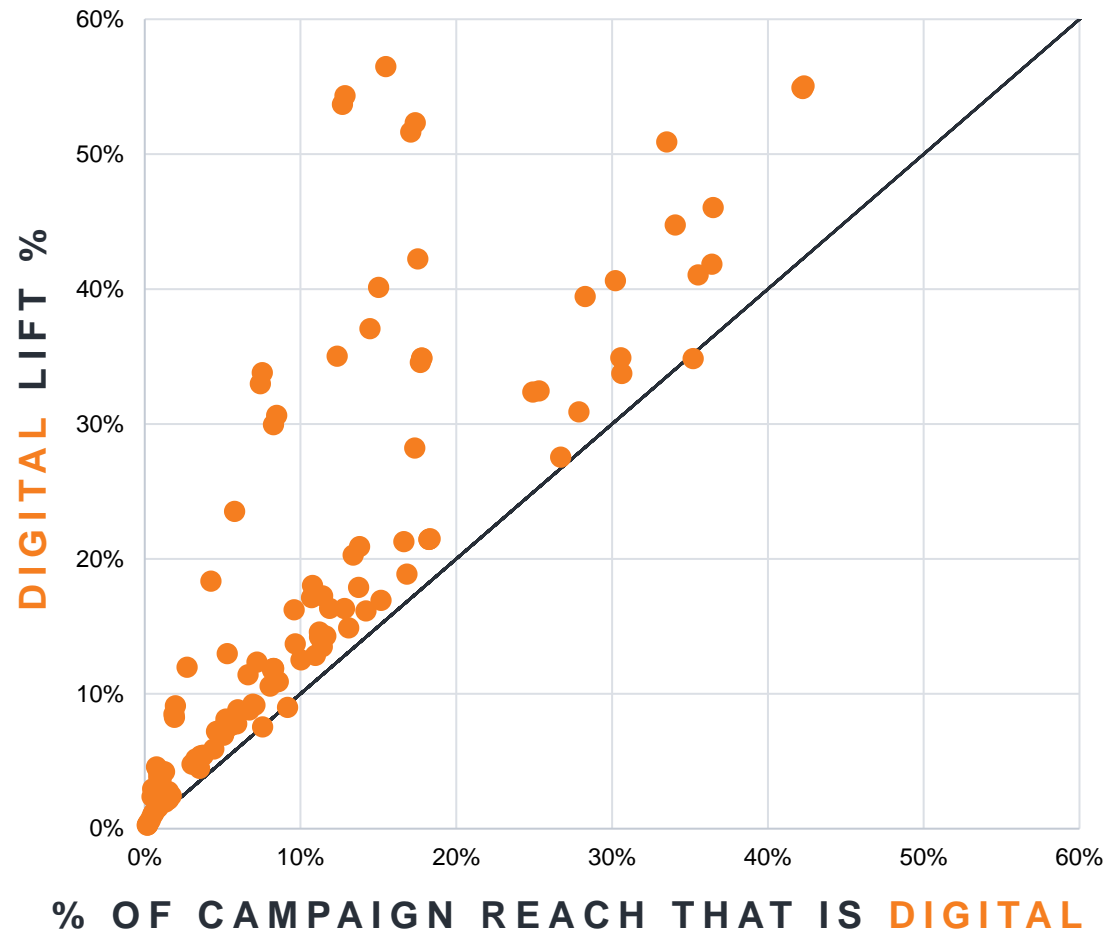
DAILY INCREMENTAL REACH FOR DAYS 8-48 (2-6 WEEKS VIEW), BY PLATFORM



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

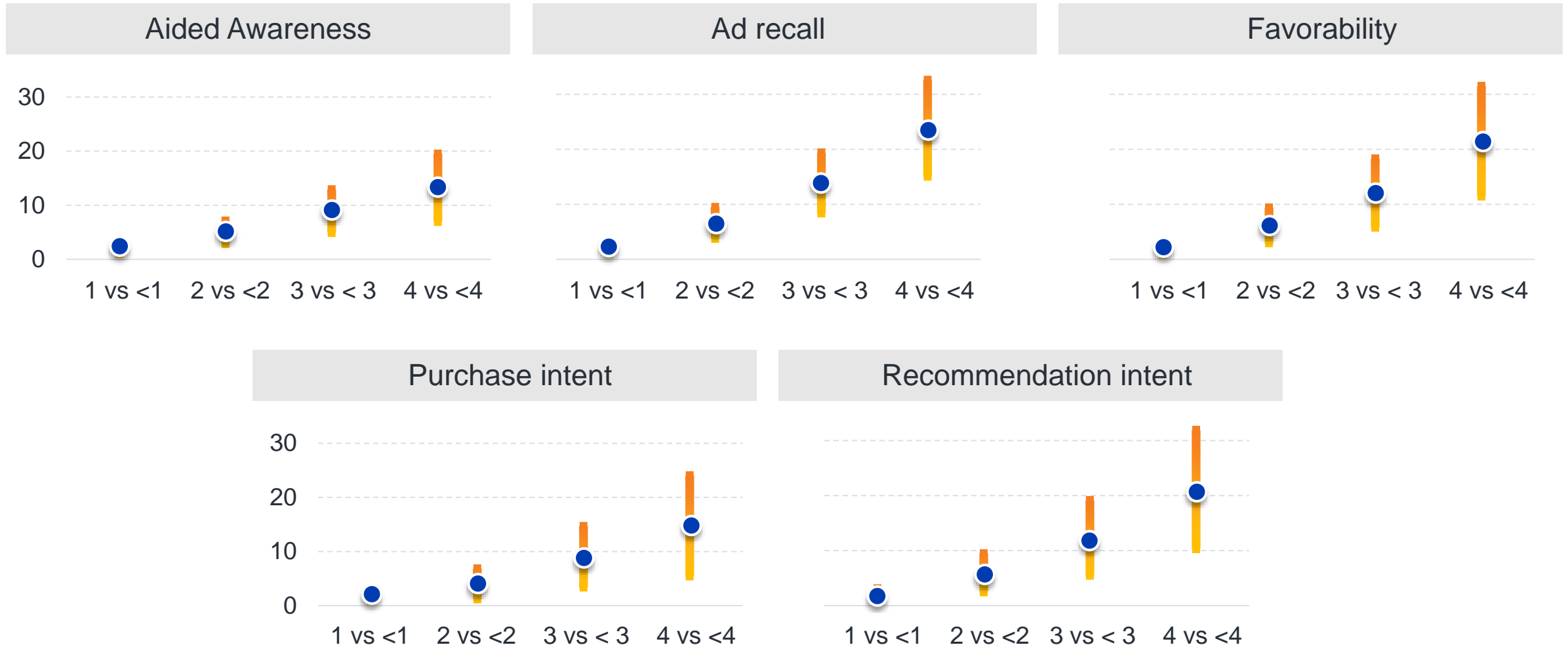


WHEN INCREASING REACH VS TV, DIGITAL AND CTV LIFT PUNCH ABOVE THEIR WEIGHT



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

Predicted average % point lift (Helmert contrasts)



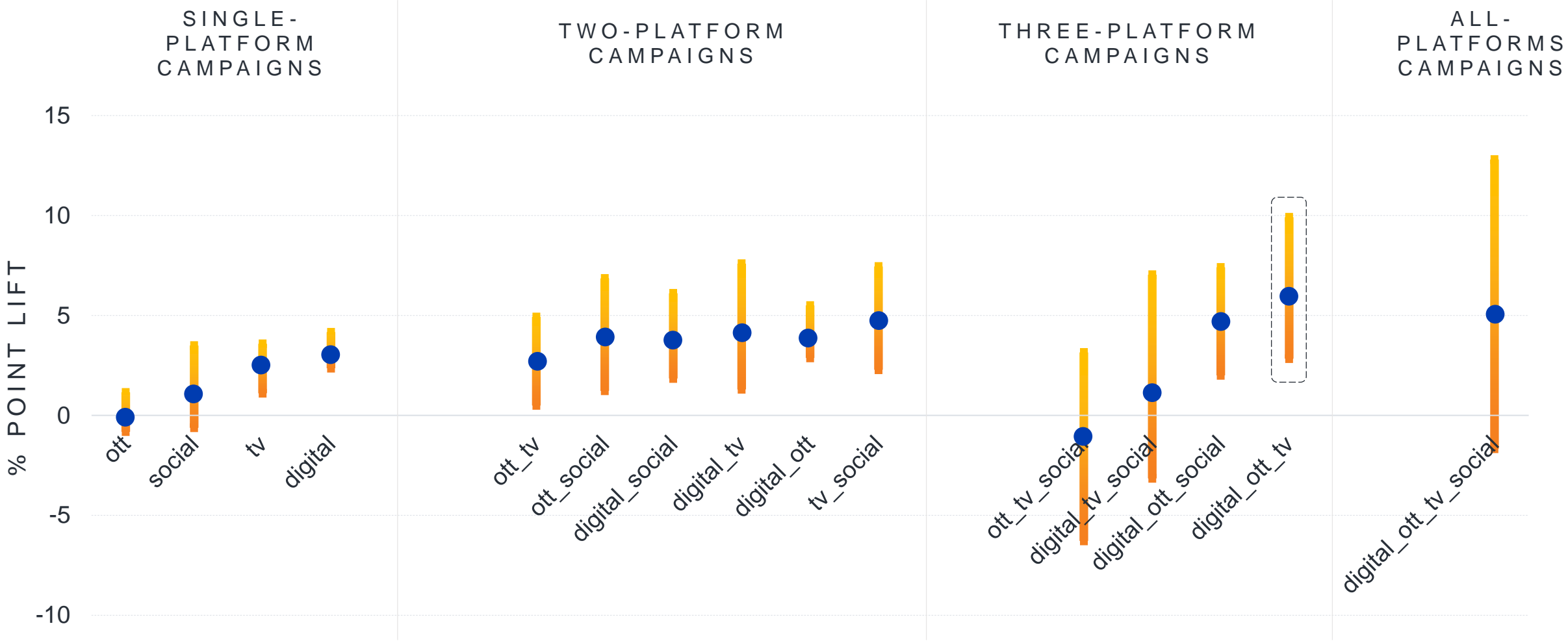
THIS TIME, WITHOUT SOCIAL MEDIA

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



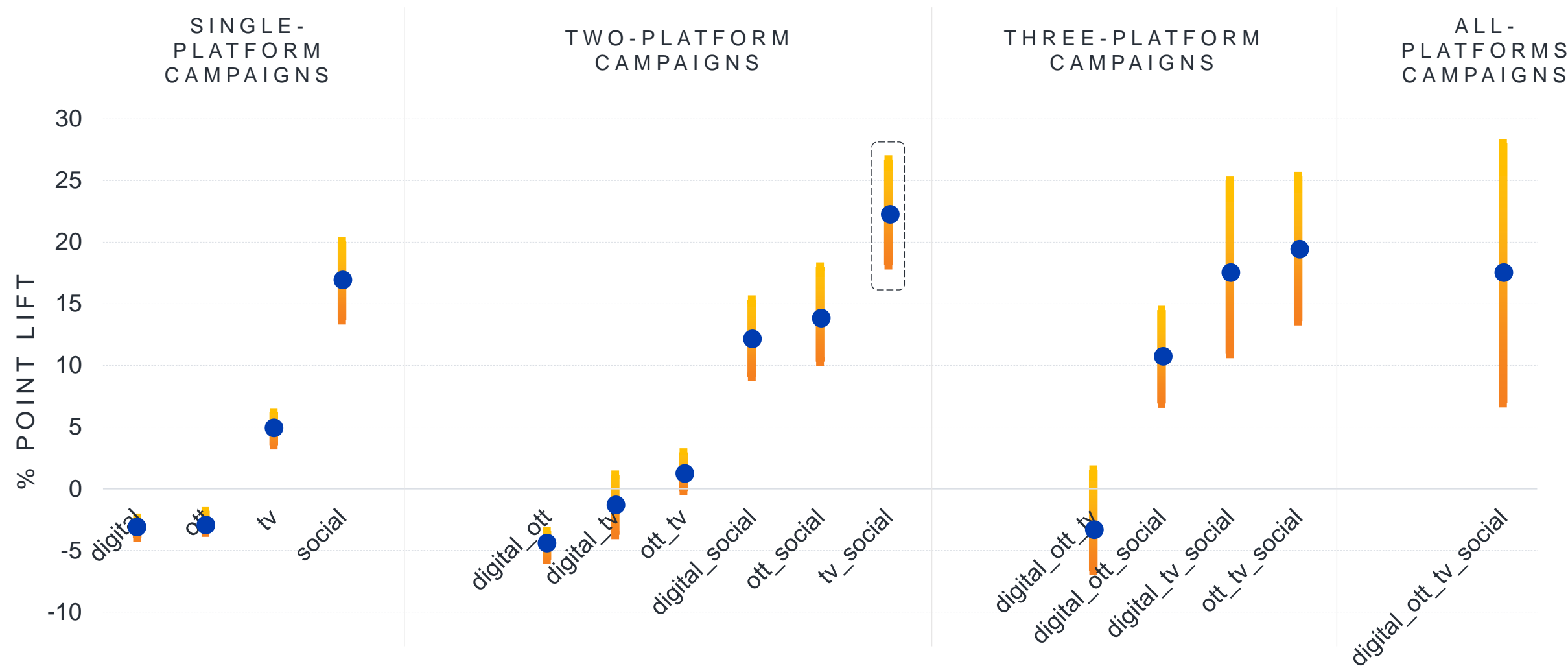
MULTI-SCREEN CAMPAIGNS PERFORM BETTER THAN SINGLE-PLATFORM CAMPAIGNS.
BUT VARIABILITY OF RESULTS INCREASES WITH THE NUMBER OF PLATFORMS.

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



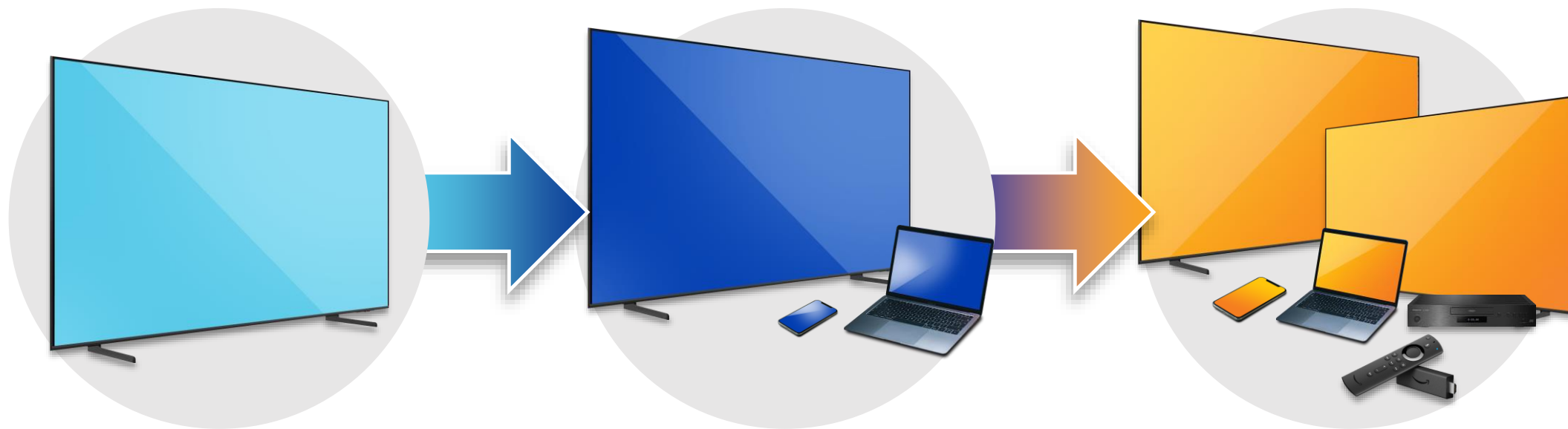
WE SEE A SIMILAR PATTERN WITH AD RECALL AND OTHER VARIABLES SUCH AS FAVORABILITY, PURCHASE RECOMMENDATION, OR RECOMMENDATION INTENT

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



OPTIMAL PLATFORM MIX DEPENDS ON THE TARGET AUDIENCE

Average Aided Awareness lift increases when adding platforms



TV

TV + DIGITAL

TV + DIGITAL + OTT

18 TO 24

6.0

15.8

17.4

TOTAL POP

2.4





















4.1

6.3

OPTIMIZING THE PLATFORM MIX DEPENDS ON THE OBJECTIVES OF THE CAMPAIGN

SOCIAL, TV, AND CTV FEATURES SOLIDLY IN OPTIMIZED CONFIGURATIONS

PLATFORM MIX THAT MAXIMIZES LIFT, BY TYPE OF LIFT FOR THE 18-24 AUDIENCE

	DIGITAL	SOCIAL	TV	CTV	AVERAGE % POINT LIFT 18-24 Audience	AVERAGE % POINT LIFT Gen Pop
Aided Awareness					17.4	6.3
Ad Recall					21.8	22.8
Favorability					21.2	18.8
Recommendation intent					20.5	20.0
Purchase Intent					18.9	11.6



Key Takeaways





1

Video is up overall.
Social & CTV are core drivers.



2

Be authentic & speak to your audience. Relevant content is critical to driving engagement. The power of influencers and advocates is REAL.



3

Channels shouldn't be approached in isolation; that's not how consumers behave in the real world.

Thank you!

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