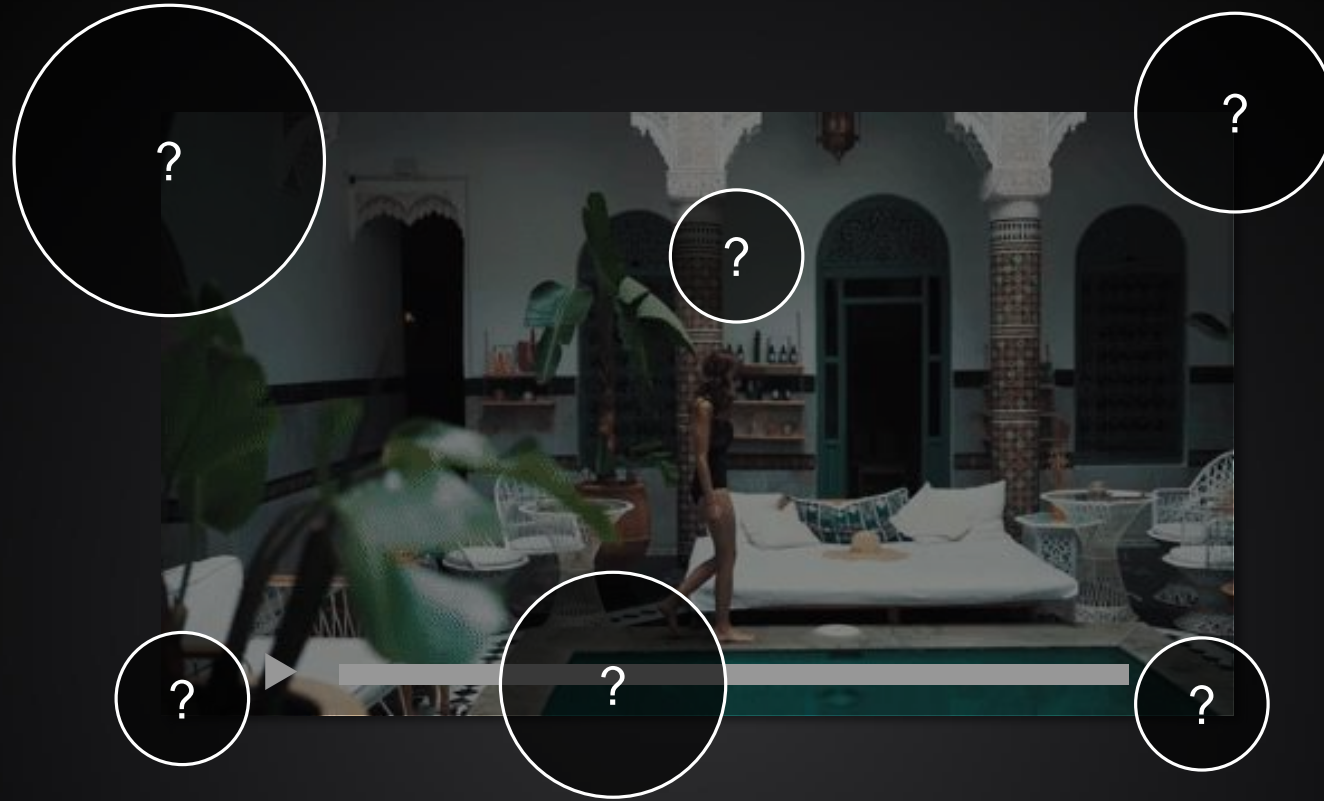# THE VIDEO DEVICE LANDSCAPE IS FRAGMENTED...

IN FACT, THE AVERAGE U.S. HOME OWNS OVER 10 DEVICES*

* Source: MAGNA's US Media Access Quarterly, Q2 2019

2

WE WANTED TO UNDERSTAND THE NUANCES OF A VIDEO SESSION TO HELP ADVERTISERS PLAN ACROSS DEVICES

OUR QUESTIONS

1 What are the motivations behind when and why consumers watch video on specific devices?

2 How receptive are consumers to advertising by device? Does attention to the video vary by device?

3 How can advertisers optimize across devices for future planning?

METHODOLOGY /
DAY BY DAY VIDEO DIARIES

METHODOLOGY

Tracked the natural nuances of video experiences across devices via online diaries

- Over-the-Top (OTT)
- Linear TV (LTV)
- PC
- Mobile

OTT devices include: Chromecast, Roku, internet-connected Blu-ray player, internet-connected gaming console, etc.

THE 5 W'S OF VIDEO CONSUMPTION

| WHY? | Motivations for watching video and selection of video device |

| WHAT | Video content type and specific genre chosen to watch, as well as *how* the selection was made |

| WHEN | Time of day and day of week video content was viewed |

| WHERE | Everything associated with environment, including location, co-viewing, other activities |

| WHO | General population, ethnicity/race, generation, music savvy consumers, etc. |

SAMPLE

Nationally representative online panel, with representative weekend and weekday diary entries. Offered in English and Spanish

Sample Size N=3,500
- General Population n=2,000
- Multi-cultural Booster n=1,500

Tracked Video Sessions N=9,613
- General Population n=5,530
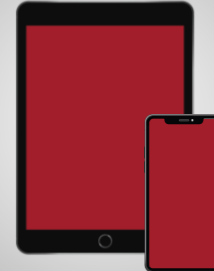- Multi-cultural Booster n=4,083

THE DEVICES

OVER-THE-TOP (OTT)

Any streaming video on a television set, including video streamed through smart TVs and OTT

LINEAR TV (LTV)

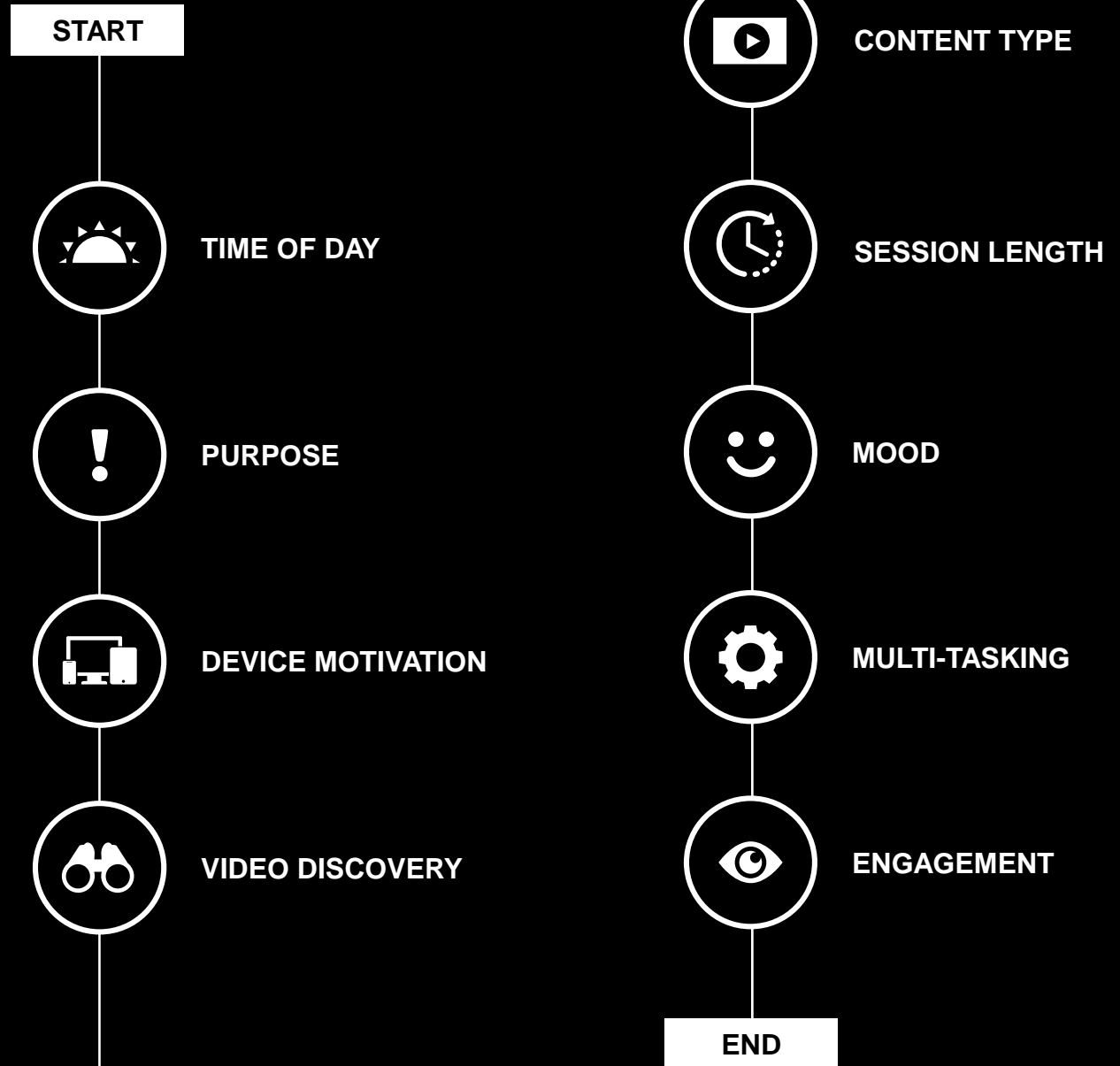Traditional linear, non-digital video on a television set
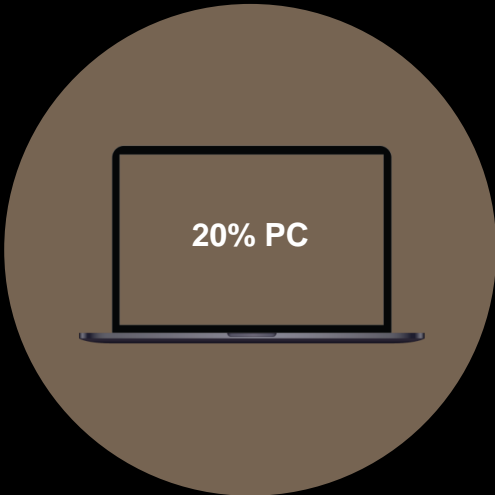
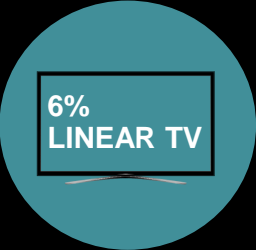**MOBILE**

Smartphone or tablet

PC

Desktop or laptop

34% OTT

20% PC

Of all Gen Pop video sessions, 34% were on OTT

6% LINEAR TV

40% MOBILE

DEVICE MAKEUP OF VIDEO DIARIES

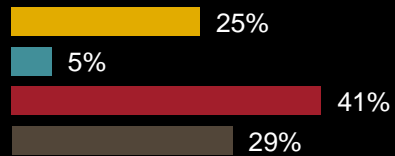**DEVICE COMPOSITION | % OF GEN POP VIDEO SESSIONS**

8

DEVICE MAKEUP OF VIDEO DIARIES

DEVICE COMPOSITION BY RACE/ETHNICITY | % OF VIDEO SESSIONS

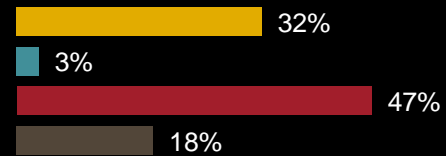■ OTT   ■ Linear TV   ■ Mobile   ■ PC

ASIAN

- OTT 25%
- Linear TV 5%
- Mobile 41%
- PC 29%

BLACK/AFRICAN-AMERICAN

- OTT 32%
- Linear TV 3%
- Mobile 47%
- PC 18%

HISPANIC/LATINO

- OTT 37%
- Linear TV 4%
- Mobile 43%
- PC 16%

WHITE

- OTT 34%
- Linear TV 7%
- Mobile 38%
- PC 21%
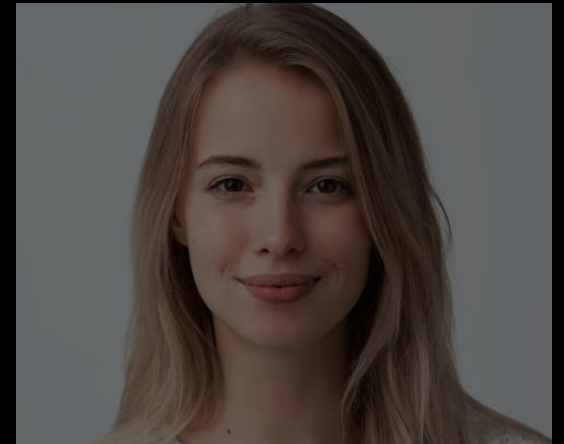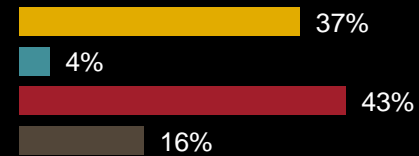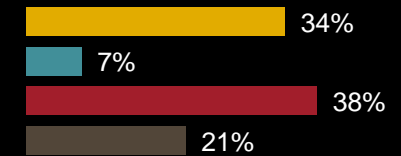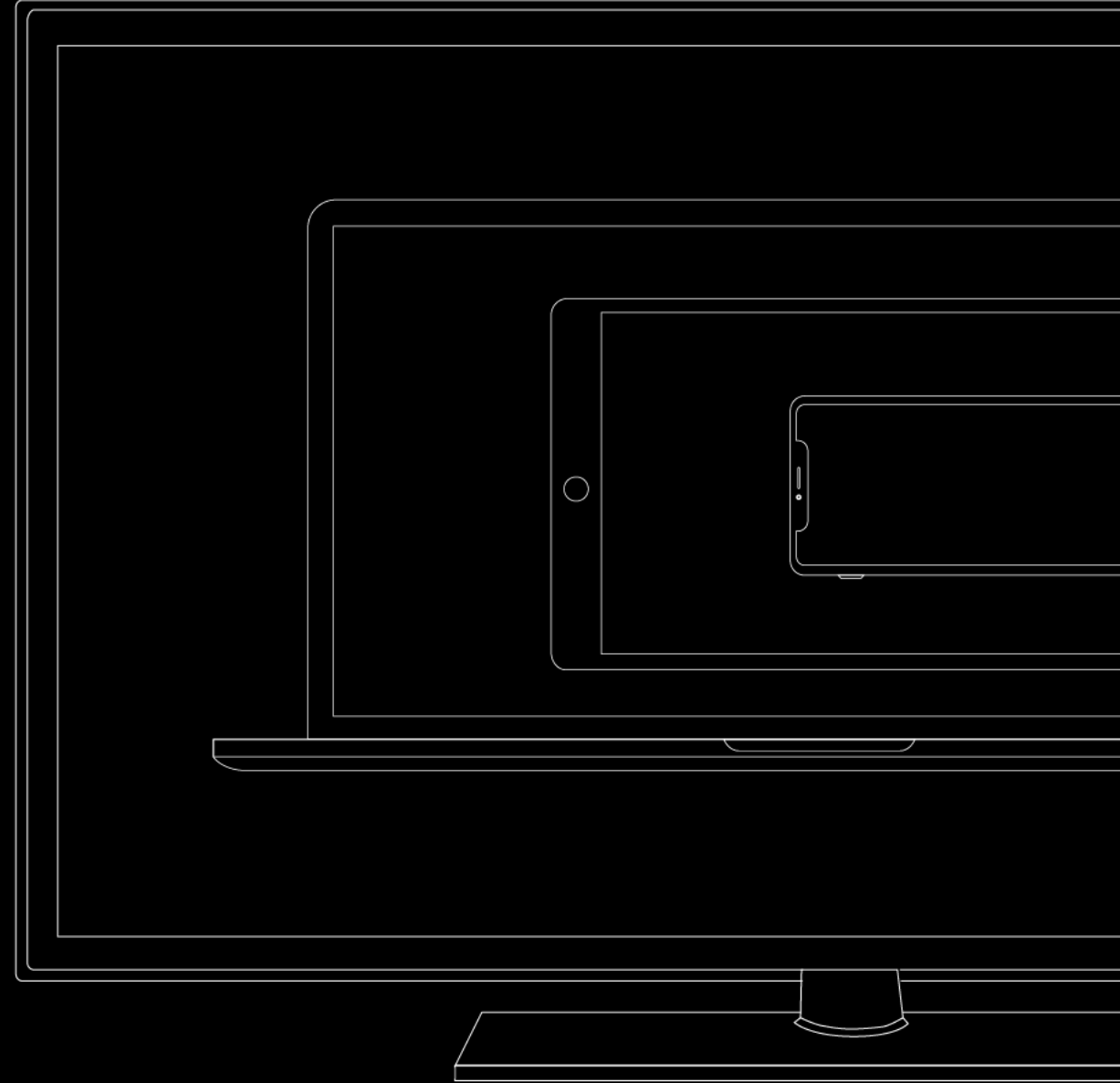
ASIAN AUDIENCES

ASIAN VIEWERS ARE MOST LIKELY ON MOBILE, BUT PC IS RUNNER-UP

Asian audiences are more likely to be on PC than other races/ethnicities

DEVICE COMPOSITION | ASIAN | % OF VIDEO SESSIONS

- ■ OTT
- ■ Linear TV
- ■ Mobile
- ■ PC

29%

41%

5%

25%
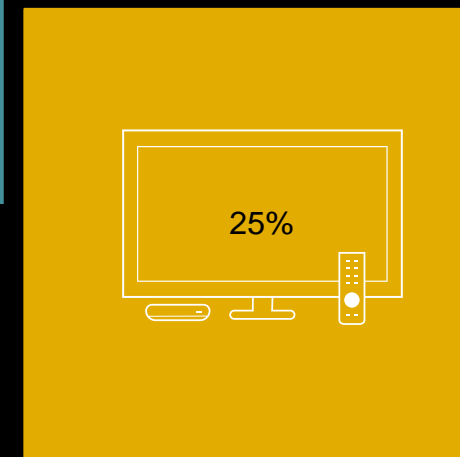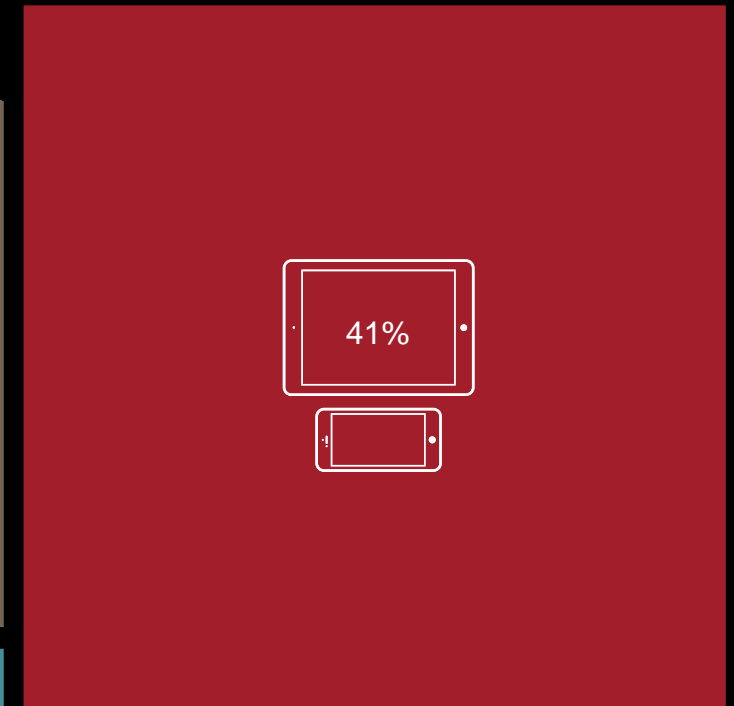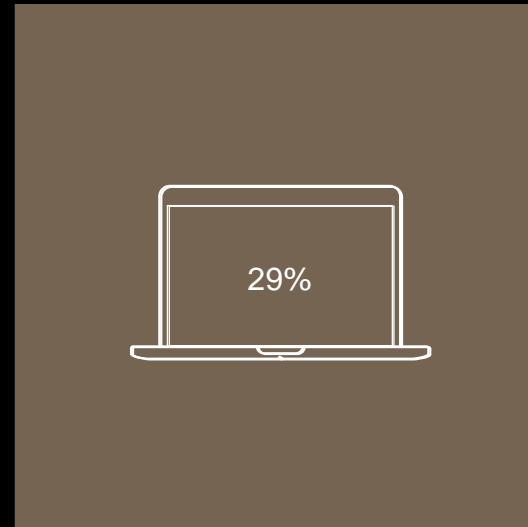
ASIAN AUDIENCES ARE LIKELY CO-VIEWING ON OTT, BUT MOBILE AND PC ARE CLOSELY TIED

DEVICE SELECTED | % OF CO-VIEWING VIDEO SESSIONS

40%
OTT

25%
PC

6%
LINEAR TV

29%
MOBILE
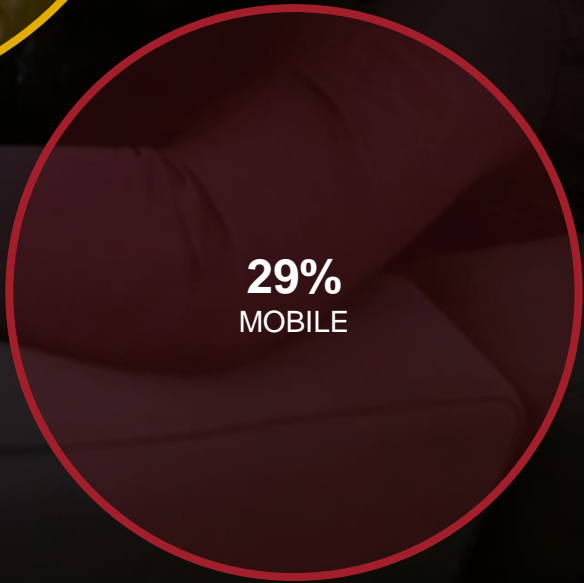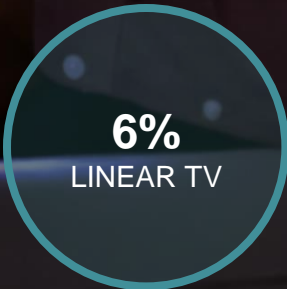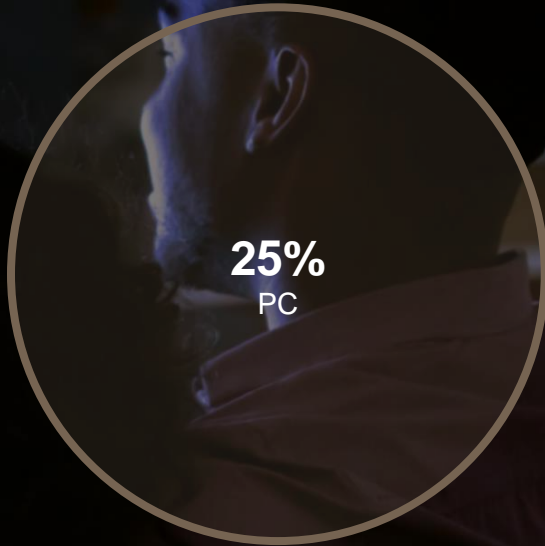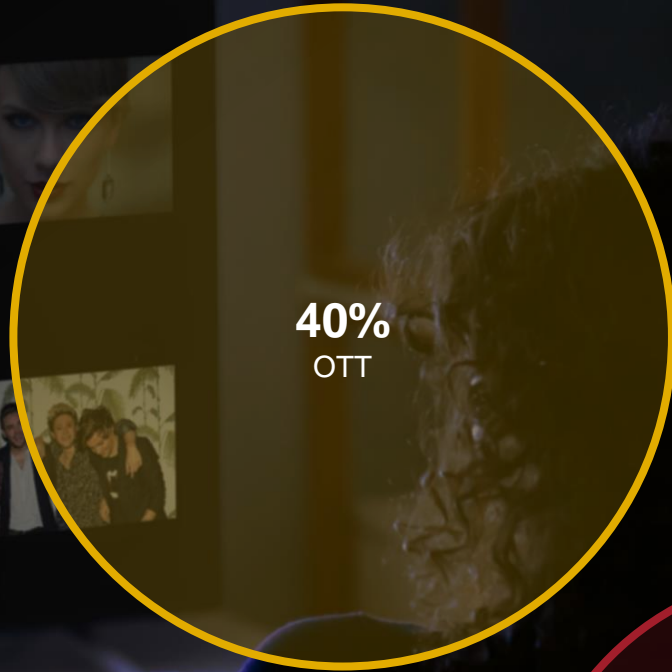
ASIAN VIEWERS ARE MORE LIKELY TO SEEK OUT INFORMATIVE VIDEOS, AS WE TEND TO SEE WITH PC USAGE

In general, PC is the most convenient device for viewers seeking informative content.

CONTENT GENRE | ASIAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)
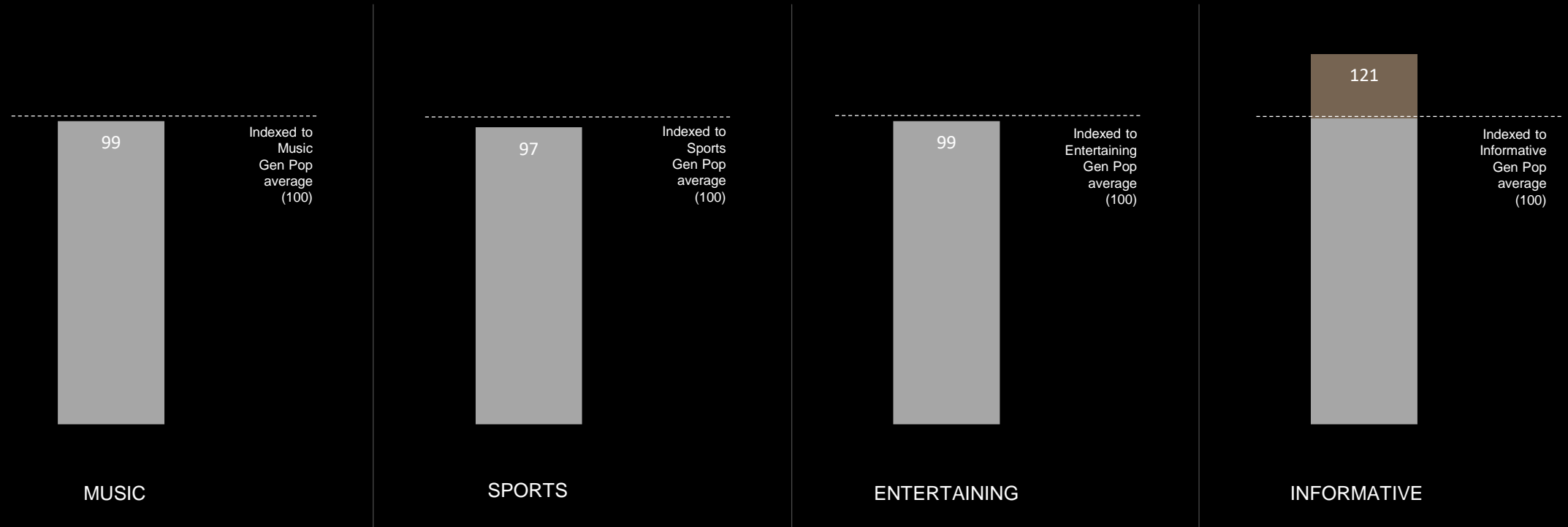
99	97	99	121
Indexed to Music Gen Pop average (100)	Indexed to Sports Gen Pop average (100)	Indexed to Entertaining Gen Pop average (100)	Indexed to Informative Gen Pop average (100)
MUSIC	SPORTS	ENTERTAINING	INFORMATIVE

BECAUSE THEY'RE IN A TASK-BASED VIEWING SESSION, ASIAN VIEWERS WATCH FOR SHORTER SESSIONS

Asian viewers are likely engaged in a focused video session, as they're watching informative genres, and more likely to be on a PC than the average viewer.

SESSION LENGTH BY RACE/ETHNICITY | % OF VIDEO SESSIONS

■ Asian   ▨ Gen Pop Video Viewer

< 30 MINS	30 - 59 MINS	> 1 HOUR

< 30 MINS: 35% / 29% ↑

30 - 59 MINS: 39% / 37%

> 1 HOUR: 26% / 34% ↓
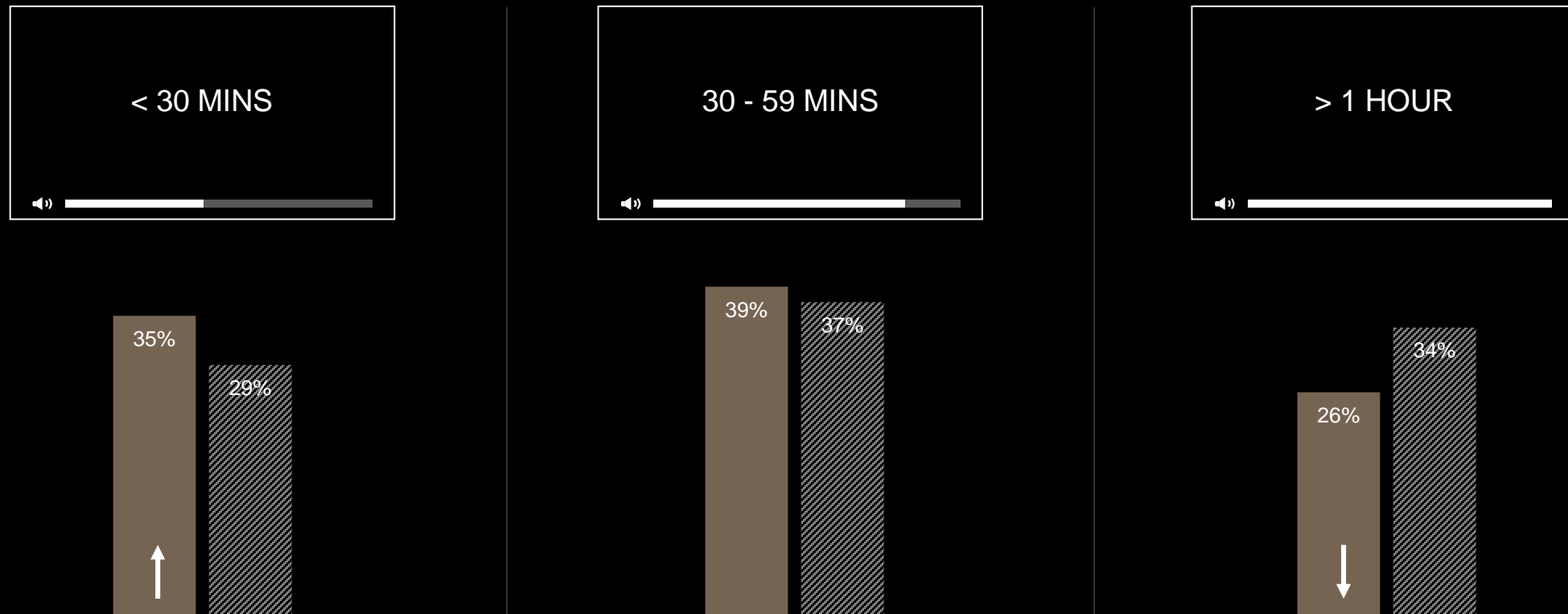
OLDER GENERATIONS ARE DRIVING THE VIEWERSHIP OF INFORMATIVE GENRES, WHILE THE YOUNG WATCH MUSIC

CONTENT GENRE BY GENERATION | ASIAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)
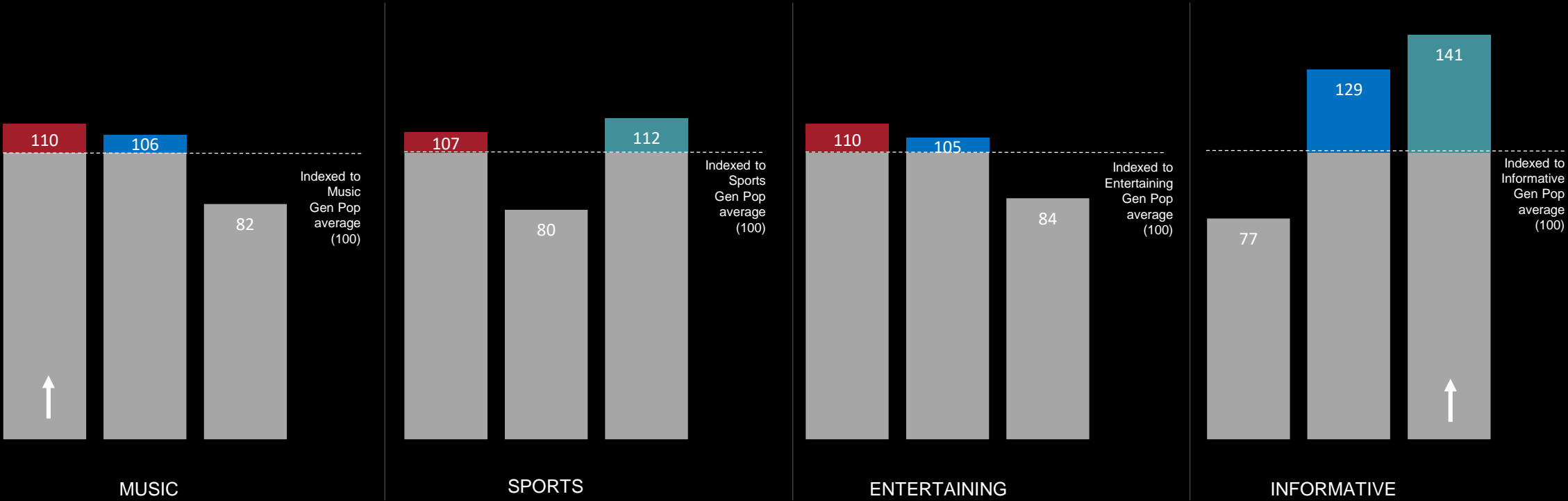
■ Gen Z (A13-21) ■ Millennials (A22-37) ■ Gen X (A38-54)

MUSIC
- 110
- 106
- 82

Indexed to Music Gen Pop average (100)

SPORTS
- 107
- 80
- 112

Indexed to Sports Gen Pop average (100)

ENTERTAINING
- 110
- 105
- 84

Indexed to Entertaining Gen Pop average (100)

INFORMATIVE
- 77
- 129
- 141

Indexed to Informative Gen Pop average (100)

15

SINCE THEY'RE WATCHING BINGE-FRIENDLY GENRES LIKE MUSIC, YOUNGER ASIAN VIEWERS WATCH FOR LONGER

On the other hand, older Asian viewers are watching for shorter sessions, likely of informative content.

SESSION LENGTH BY GENERATION | ASIAN | % OF VIDEO SESSIONS

■ Gen Z (A13-21)   ■ Millennials (A22-37)   ■ Gen X (A38-54)

< 30 MINS

- Gen Z: 30%
- Millennials: 36%
- Gen X: 38% ↑

30 - 59 MINS

- Gen Z: 37%
- Millennials: 38%
- Gen X: 40%

> 1 HOUR

- Gen Z: 33% ↑
- Millennials: 26%
- Gen X: 22%
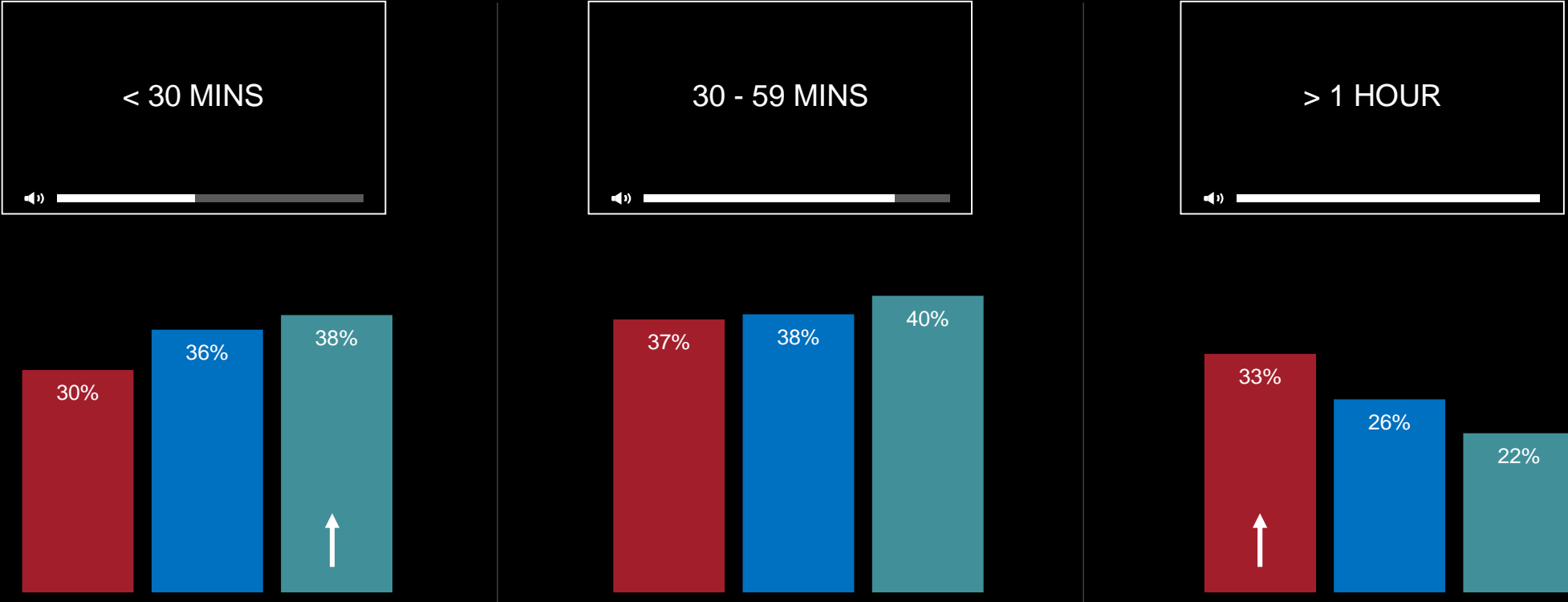
REGARDLESS OF DEVICE, ASIAN VIEWERS ARE LESS ATTENTIVE AND RECEPTIVE

Despite lower engagement, there are certain content genres these groups are most attentive/receptive to, such as music content.
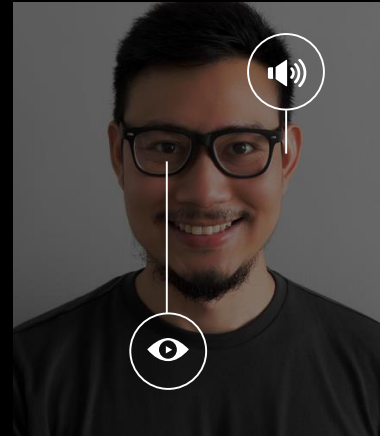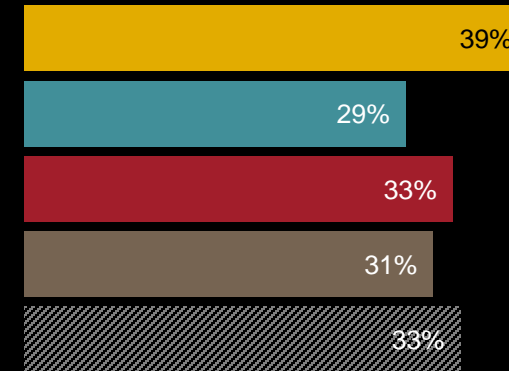
ENGAGEMENT METRICS (TB) | ASIAN | % OF VIDEO SESSIONS

- 🟨 OTT
- 🟦 Linear TV
- 🟥 Mobile
- 🟫 PC
- ▨ Asian Video Viewer on Any Device

ATTENTION TO AUDIO + VISUAL (TB)

OTT	39%
Linear TV	29%
Mobile	33%
PC	31%
Asian Video Viewer on Any Device	33%

AD RECEPTIVITY (TB)

OTT	49%
Linear TV	29%
Mobile	52%
PC	47%
Asian Video Viewer on Any Device	49%
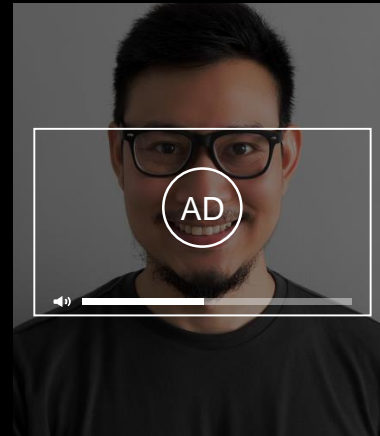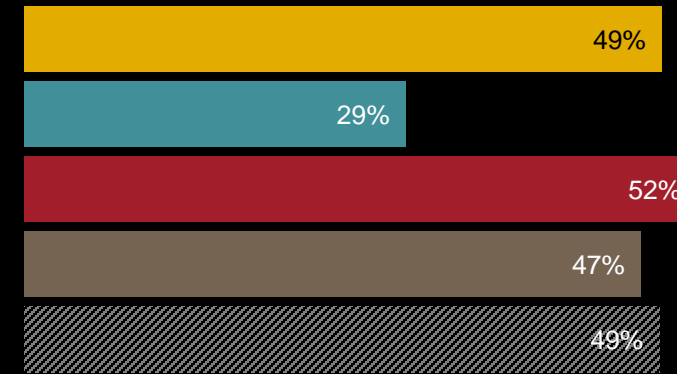
A whopping 70% of Asian viewers watching music content on OTT are receptive to ads

BUT YOUNGER ASIAN VIEWERS ARE ESPECIALLY RECEPTIVE TO ADS

ATTENTION TO AUDIO + VISUAL (TB)

- 30%
- 31%
- 39%
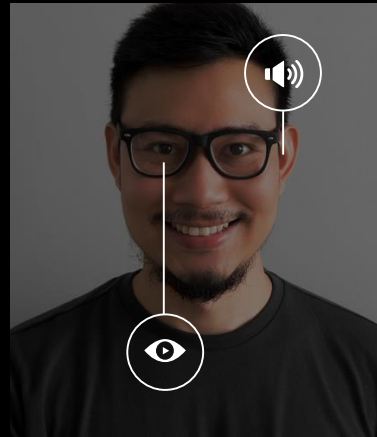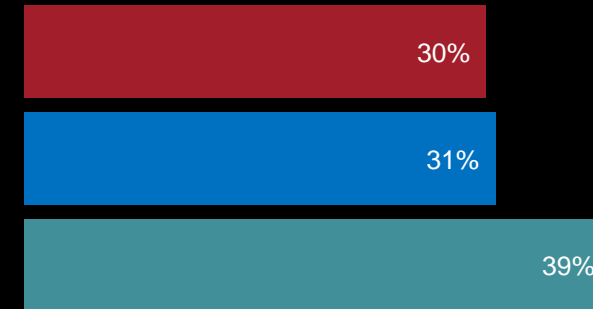
ENGAGEMENT METRICS (TB) BY GENERATION | ASIAN | % OF VIDEO SESSIONS
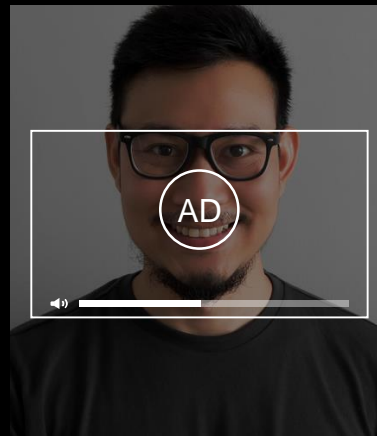
- ■ Gen Z (A13-21)
- ■ Millennials (A22-37)
- ■ Gen X (A38-54)

AD RECEPTIVITY (TB)
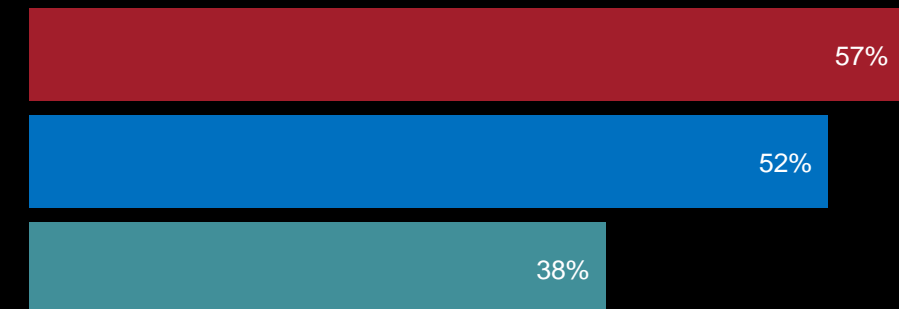
- 57%
- 52%
- 38%

AD

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TAKEAWAYS ON ASIAN AUDIENCES

1 After mobile, PC is the second most frequented video viewing destination for Asian audiences.

2 Informative genres reigns supreme among Asian audiences, particularly among older generations.

3 Session length is a key differentiator between younger and older Asian viewers. The young tend to watch longer, while older viewers watch for shorter sessions.

4 In general, Asian audiences are less attentive and receptive than the average viewer, but younger Asian viewers are particularly open to ads.

5 Asian viewers are particularly open to ads on OTT when watching music content.

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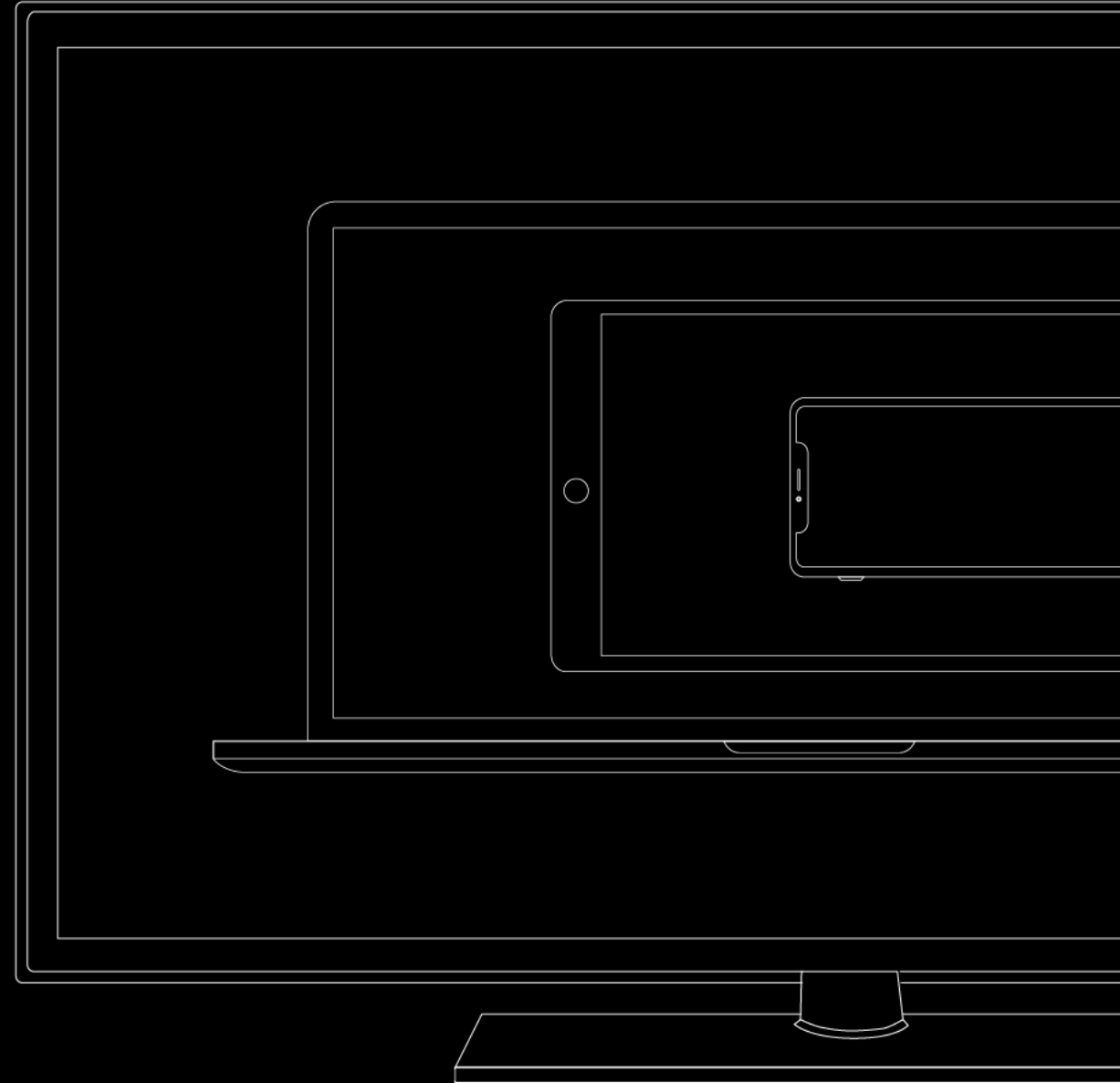
BLACK/
AFRICAN-
AMERICAN
AUDIENCES

BLACK/AFRICAN-AMERICAN VIEWERS ARE MOST LIKELY ON MOBILE, THEN OTT

Black/African-American viewers are more likely to use mobile than other ethnic groups.

DEVICE COMPOSITION | BLACK/AFRICAN-AMERICAN | % OF VIDEO SESSIONS

- ■ OTT
- ■ Linear TV
- ■ Mobile
- ■ PC

32%

47%

3%

18%
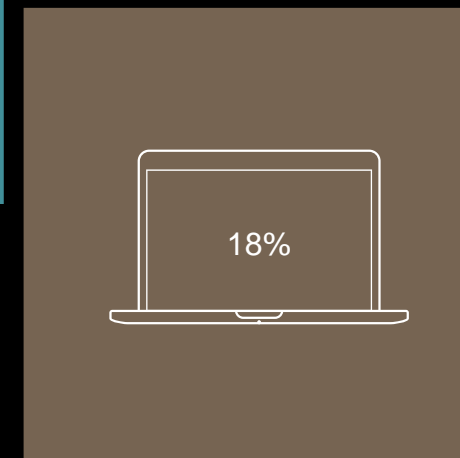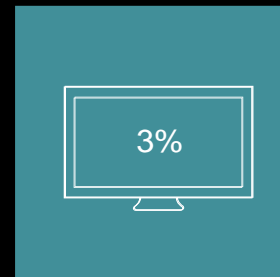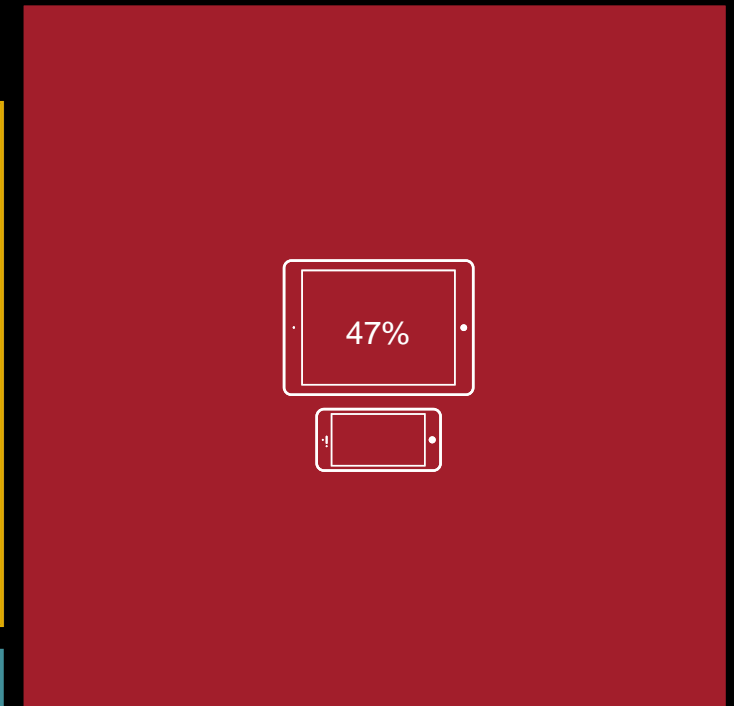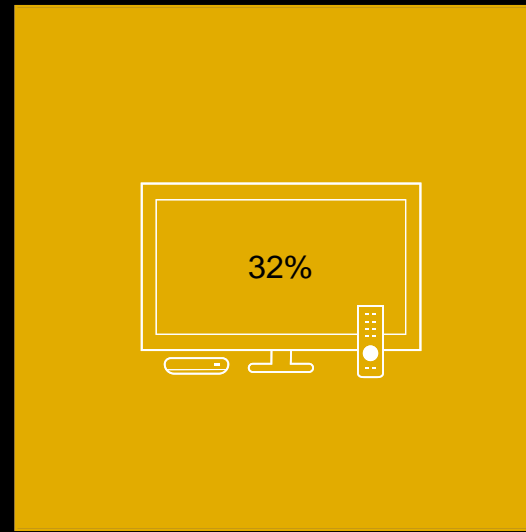
BLACK/AFRICAN-AMERICAN VIEWERS ARE THE MOST LIKELY AUDIENCE TO SEEK OUT MUSIC AND SPORTS CONTENT

CONTENT GENRE | BLACK/AFRICAN-AMERICAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)
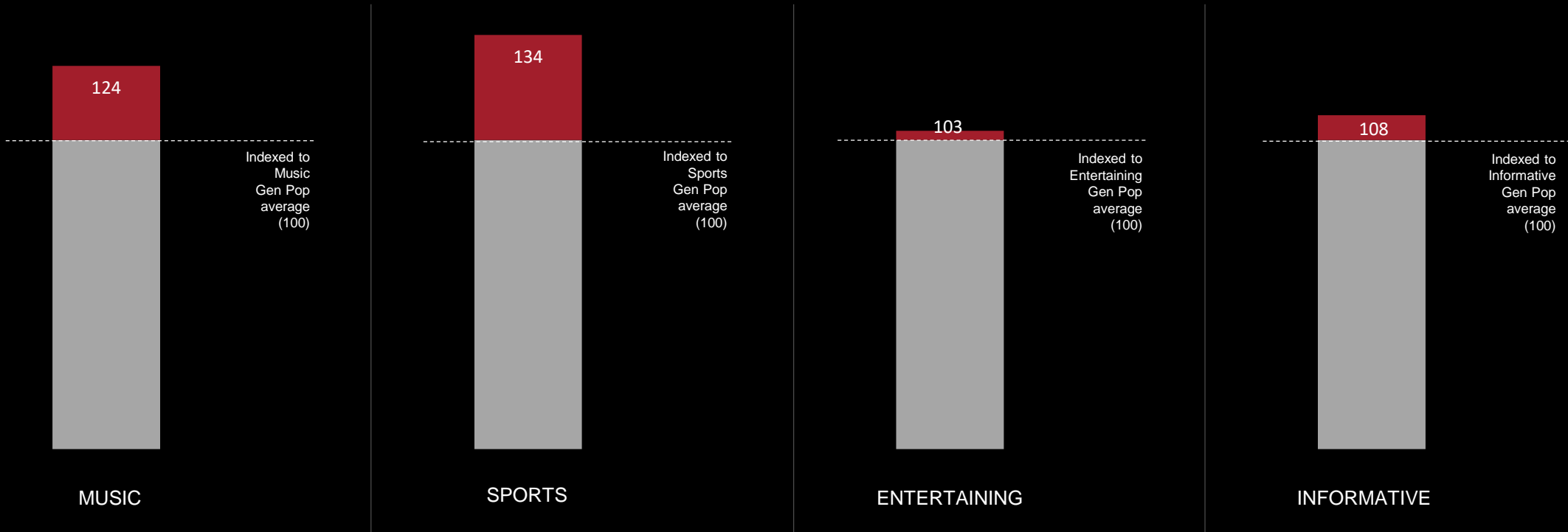
124	**134**	**103**	**108**
Indexed to Music Gen Pop average (100)	Indexed to Sports Gen Pop average (100)	Indexed to Entertaining Gen Pop average (100)	Indexed to Informative Gen Pop average (100)
MUSIC	SPORTS	ENTERTAINING	INFORMATIVE

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
Black/African-American n=2,383
Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?

BLACK/AFRICAN-AMERICAN AUDIENCES WATCH FOR LONGER SESSIONS, OFTEN OF BINGE-FRIENDLY GENRES

SESSION LENGTH | BLACK/AFRICAN-AMERICAN | % OF VIDEO SESSIONS

■ Black/African-American   ▨ Gen Pop Video Viewer

< 30 MINS	30 - 59 MINS	> 1 HOUR

29% 29%	32% 37%	39% 34%
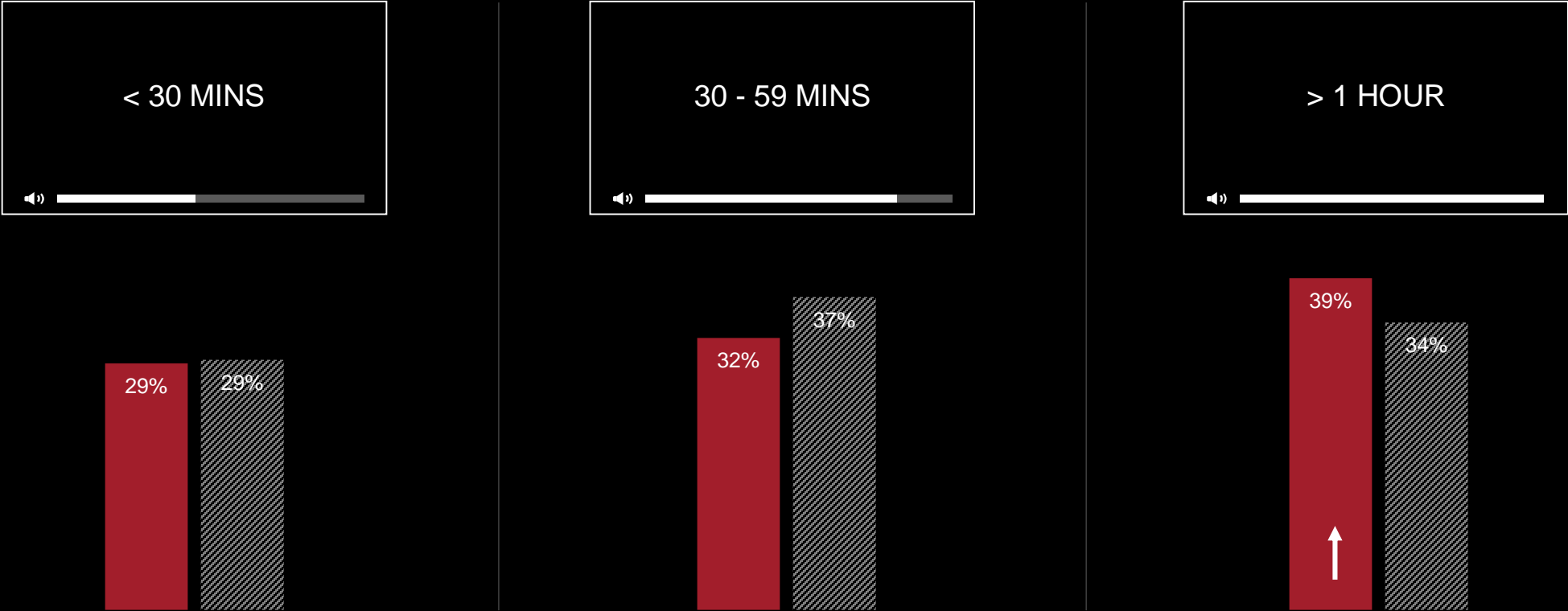
YOUNGER GENERATIONS ARE DRIVING VIEWERSHIP OF ALL VIDEO GENRES, PRIMARILY SPORTS

CONTENT GENRE BY GENERATION | BLACK/AFRICAN-AMERICAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Gen Z (A13-21)　　■ Millennials (A22-37)　　■ Gen X (A38-54)

MUSIC
- Gen Z: 110
- Millennials: 112
- Gen X: 150

Indexed to Music Gen Pop average (100)

SPORTS
- Gen Z: 161
- Millennials: 119
- Gen X: 135

Indexed to Sports Gen Pop average (100)

ENTERTAINING
- Gen Z: 122
- Millennials: 105
- Gen X: 88

Indexed to Entertaining Gen Pop average (100)

INFORMATIVE
- Gen Z: 111
- Millennials: 108
- Gen X: 106

Indexed to Informative Gen Pop average (100)
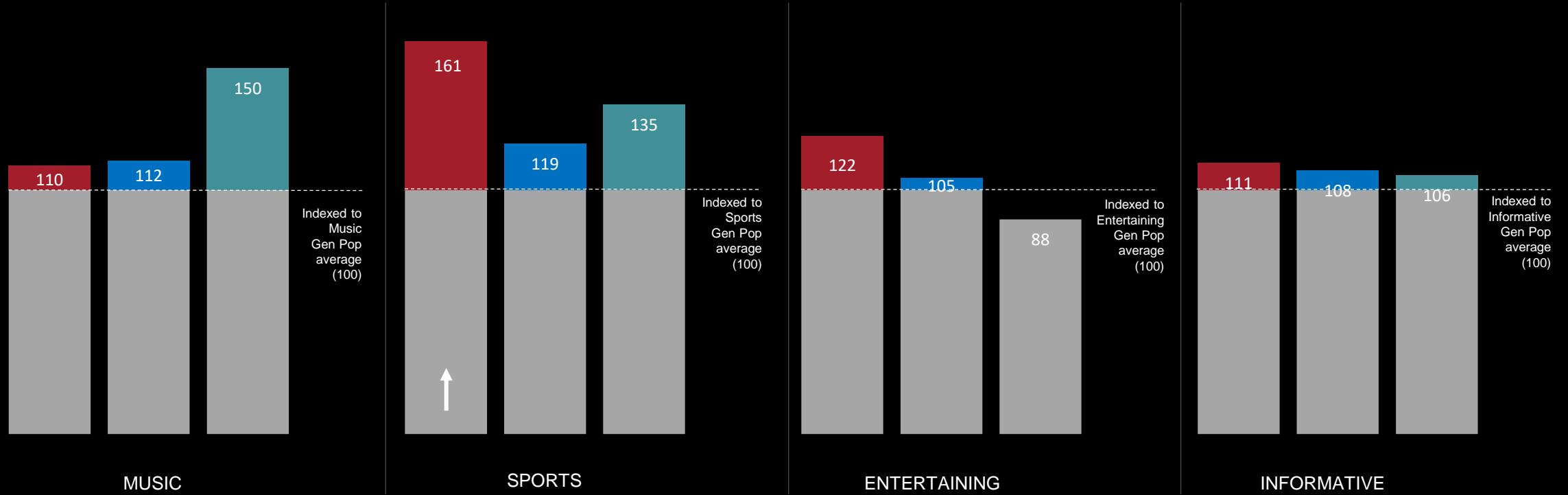
*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
Black/African-American: Gen Z n=521, Millennial n=1,009, Gen X n=752
Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?

24

...BUT YOUNGER VIEWERS ARE MORE LIKELY TO WATCH IN SHORT SPURTS THAN OLDER AUDIENCES

Unlike younger Asian audiences, younger Black/African-American viewers tend to watch for shorter sessions.

SESSION LENGTH BY GENERATION | BLACK/AFRICAN-AMERICAN | % OF VIDEO SESSIONS

■ Gen Z (A13-21)　　■ Millennials (A22-37)　　■ Gen X (A38-54)

< 30 MINS	30 - 59 MINS	> 1 HOUR

< 30 MINS
- Gen Z: 36%
- Millennials: 28%
- Gen X: 27%

30 - 59 MINS
- Gen Z: 29%
- Millennials: 33%
- Gen X: 33%

> 1 HOUR
- Gen Z: 35%
- Millennials: 40%
- Gen X: 40%

MAGNA　IPG MEDIA LAB　vevo
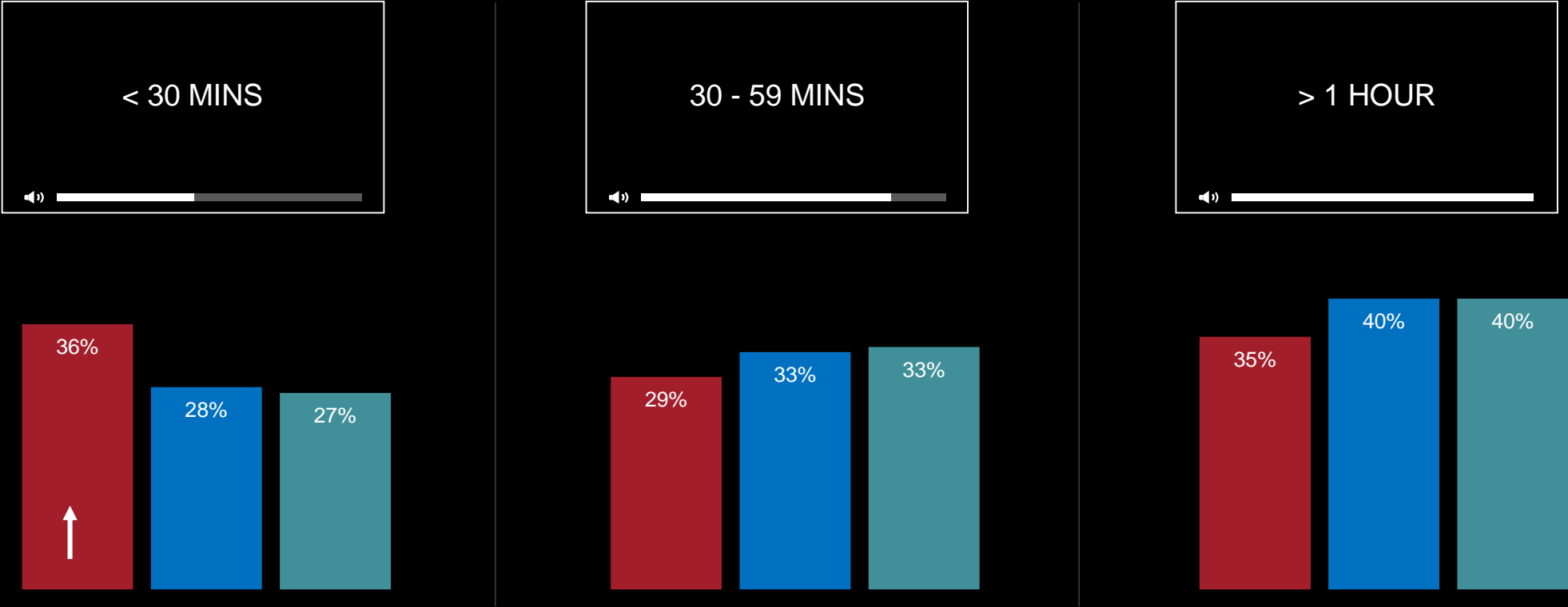
BLACK/AFRICAN-AMERICAN VIEWERS ARE LIKELY MULTI-TASKING ON A PC

Despite their multi-tasking tendencies on PC, they are still highly receptive to advertising on this device.

MULTI-TASKING BY DEVICE | BLACK/AFRICAN-AMERICAN | % OF VIDEO SESSIONS

■ OTT   ■ Linear TV   ■ Mobile   ■ PC   ▨ Black/African-American Video Viewer on Any Device

HIGH INVOLVEMENT (E.G. WORKING)

- OTT: 32%
- Linear TV: 20%
- Mobile: 34%
- PC: 41%
- Any Device: 34%

JUST WATCHING THE VIDEO

- OTT: 49%
- Linear TV: 46%
- Mobile: 43%
- PC: 37%
- Any Device: 44%
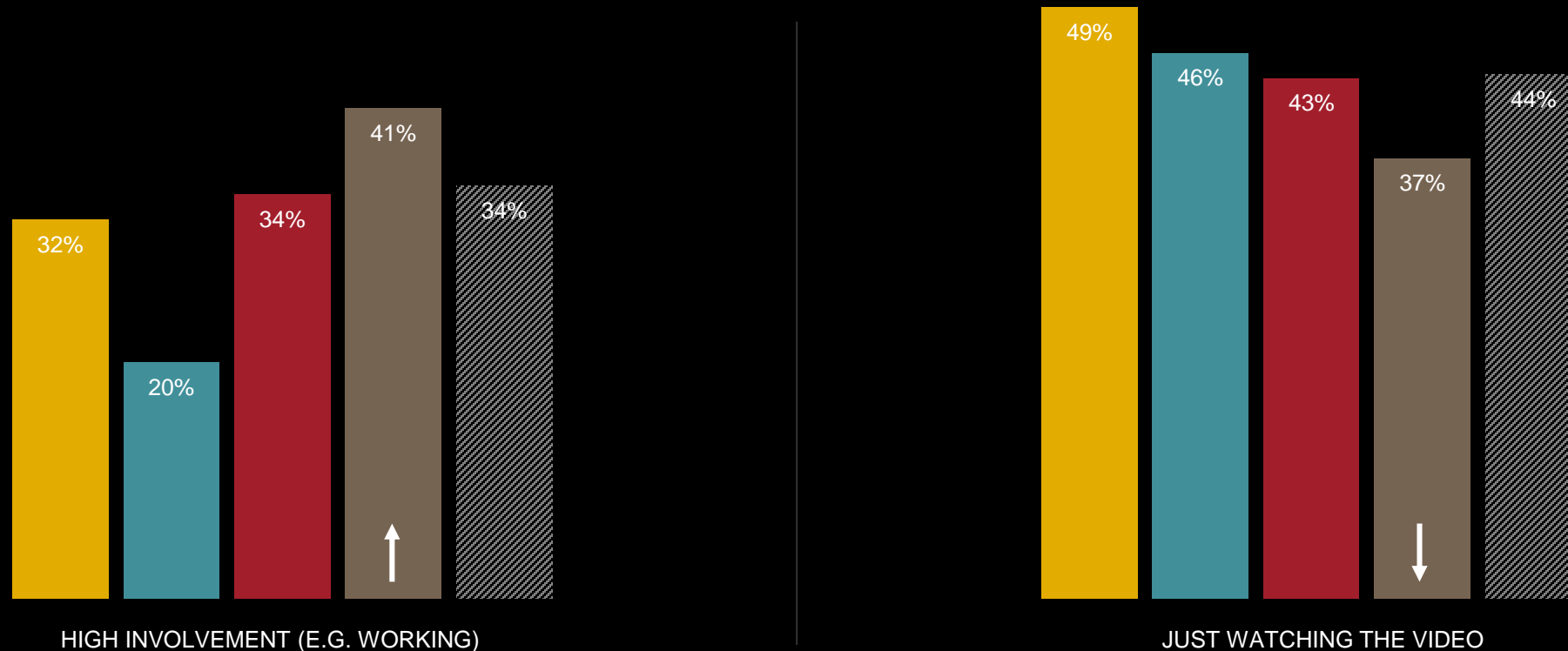
BLACK/AFRICAN-AMERICAN AUDIENCES ARE ESPECIALLY RECEPTIVE ON OTT

Though Black/African-American viewers on OTT are just as attentive as the average viewer, they're remarkably more receptive to ads on OTT.

ENGAGEMENT METRICS (TB) | BLACK/AFRICAN-AMERICAN | % OF VIDEO SESSIONS

- OTT
- Linear TV
- Mobile
- PC
- Black/African-American Video Viewer on Any Device

ATTENTION TO AUDIO + VISUAL (TB)

OTT	43%
Linear TV	49%
Mobile	41%
PC	36%
Any Device	40%

AD RECEPTIVITY (TB)

OTT	63%
Linear TV	38%
Mobile	53%
PC	62%
Any Device	58%

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TAKEAWAYS ON BLACK/ AFRICAN AMERICAN AUDIENCES

1 After mobile, OTT is a close second for Black/African-American audiences.

2 Black/African-American audiences are more likely to watch music and sports content.

3 Even though Black/African-American viewers generally watch for longer, younger audiences are watching in short sessions while multitasking on mobile.

4 OTT and PC devices are optimal devices to resonate with Black/African-American audiences, as they are in their most receptive state.

HISPANIC/ LATINO AUDIENCES
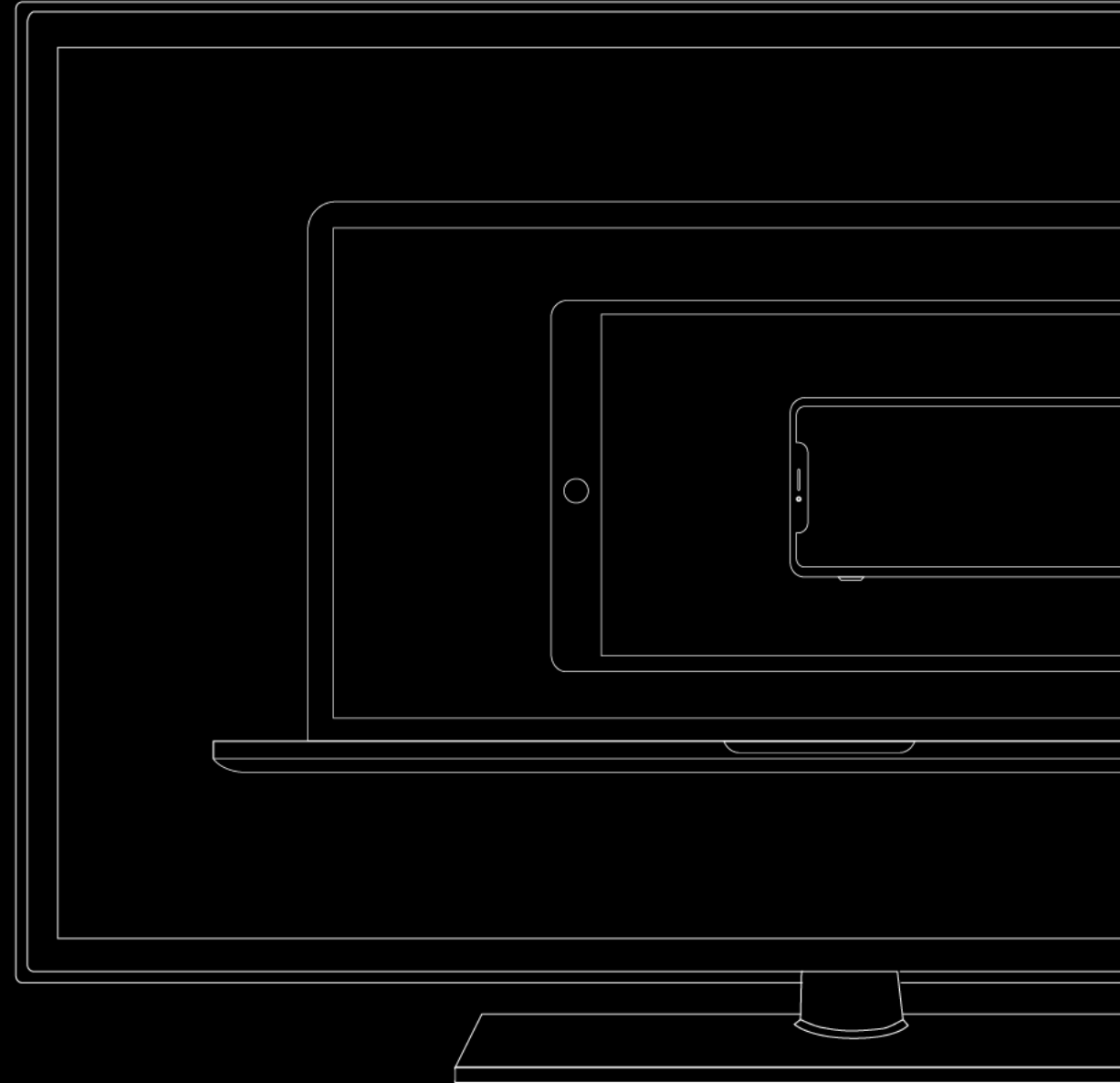
HISPANIC/LATINO VIEWERS ARE MOST LIKELY ON MOBILE, THEN OTT

Hispanic/Latino viewers are more likely to use OTT, and less likely to use PC than other ethnic groups.

DEVICE COMPOSITION | HISPANIC/LATINO | % OF VIDEO SESSIONS

- ■ OTT
- ■ Linear TV
- ■ Mobile
- ■ PC

37%

43%

4%

16%
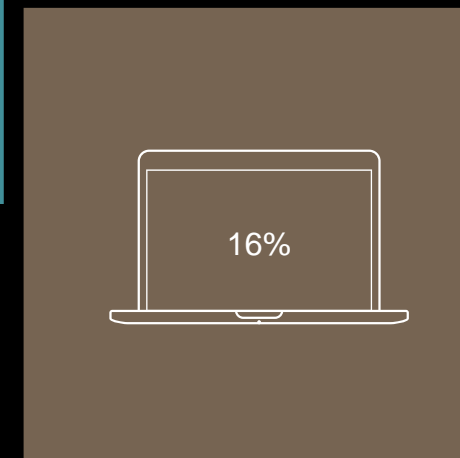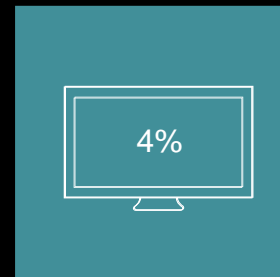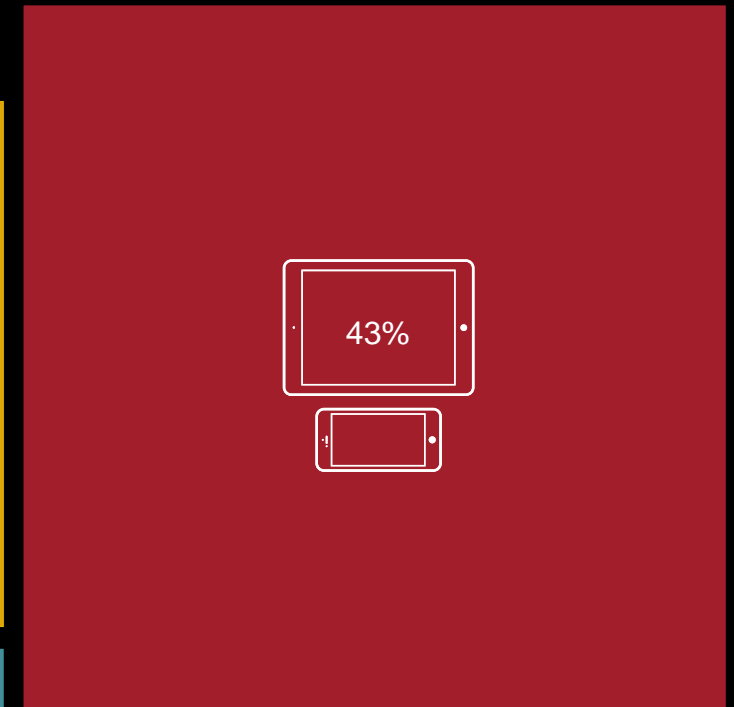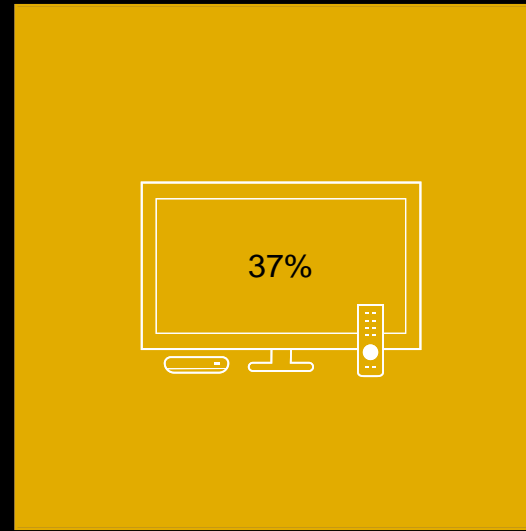
ENGLISH-SPEAKING HISPANIC/LATINO VIEWERS ARE MORE LIKELY WATCHING VIDEO ON OTT

There is a clear opportunity for OTT to highlight more Spanish language options and bring more unacculturated Hispanic/Latino audiences into the fold.

DEVICE COMPOSITION BY LANGUAGE SPOKEN | HISPANIC/LATINO | INDEXED TO HISPANIC/LATINO CATEGORY AVERAGE (100)

■ OTT　■ Linear TV　■ Mobile　■ PC

Indexed to Hispanic/Latino average (100)

SPANISH DOMINANT: 99, 46, 110, 97

BILINGUAL: 114, 67, 95, 97

ENGLISH DOMINANT: 115, 91, 110, 58

SPANISH DOMINANT　　BILINGUAL　　ENGLISH DOMINANT

31
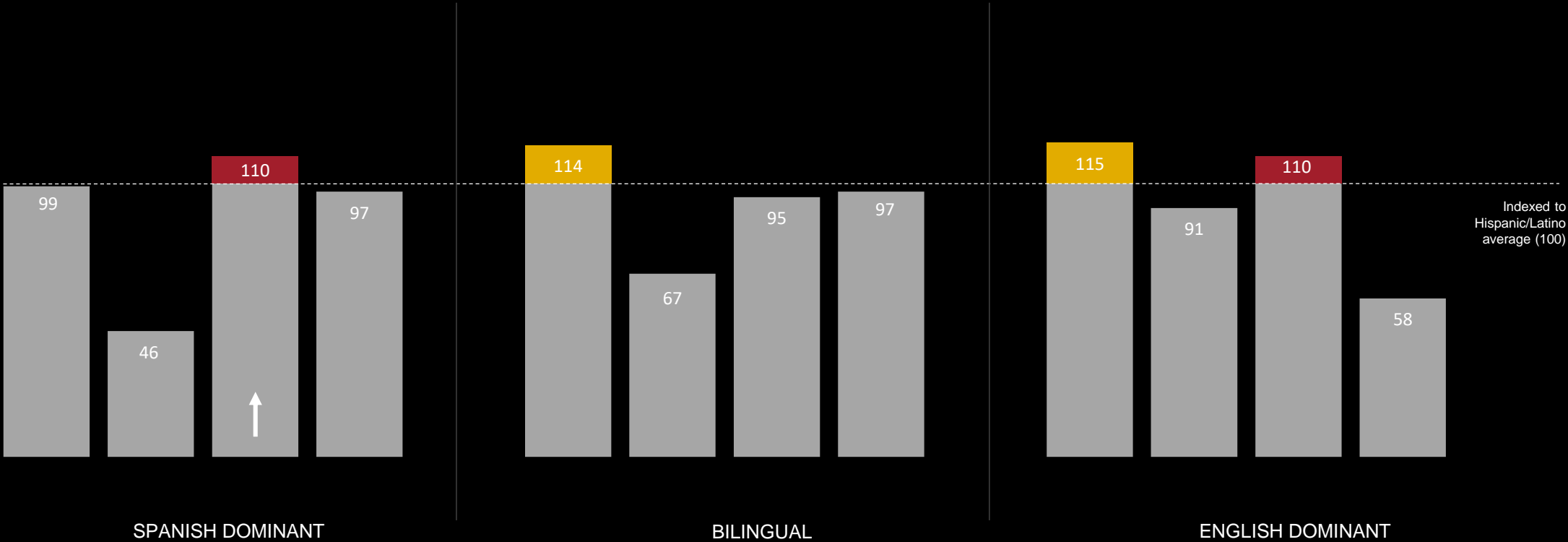
HISPANIC/LATINO AUDIENCES ARE MORE LEAN-BACK WHEN SEARCHING FOR CONTENT ON MOBILE

PURPOSE | HISPANIC/LATINO | % OF VIDEO SESSIONS

■ OTT   ■ Linear TV   ■ Mobile   ■ PC   ▨ Hispanic/Latino Video Viewer on Any Device

To unwind: OTT 39%, Linear TV 49%, Mobile 35%, PC 36%, Any Device 37%

To kill time: OTT 27%, Linear TV 25%, Mobile 32%, PC 22%, Any Device 29%

To keep up with what's going on: OTT 15%, Linear TV 23%, Mobile 15%, PC 17%, Any Device 16%

To cheer up: OTT 16%, Linear TV 7%, Mobile 15%, PC 18%, Any Device 16%

To spend time with others: OTT 21%, Linear TV 17%, Mobile 10%, PC 16%, Any Device 16%

To get other tasks done: OTT 12%, Linear TV 7%, Mobile 14%, PC 18%, Any Device 14%

To learn something new: OTT 10%, Linear TV 7%, Mobile 12%, PC 17%, Any Device 12%
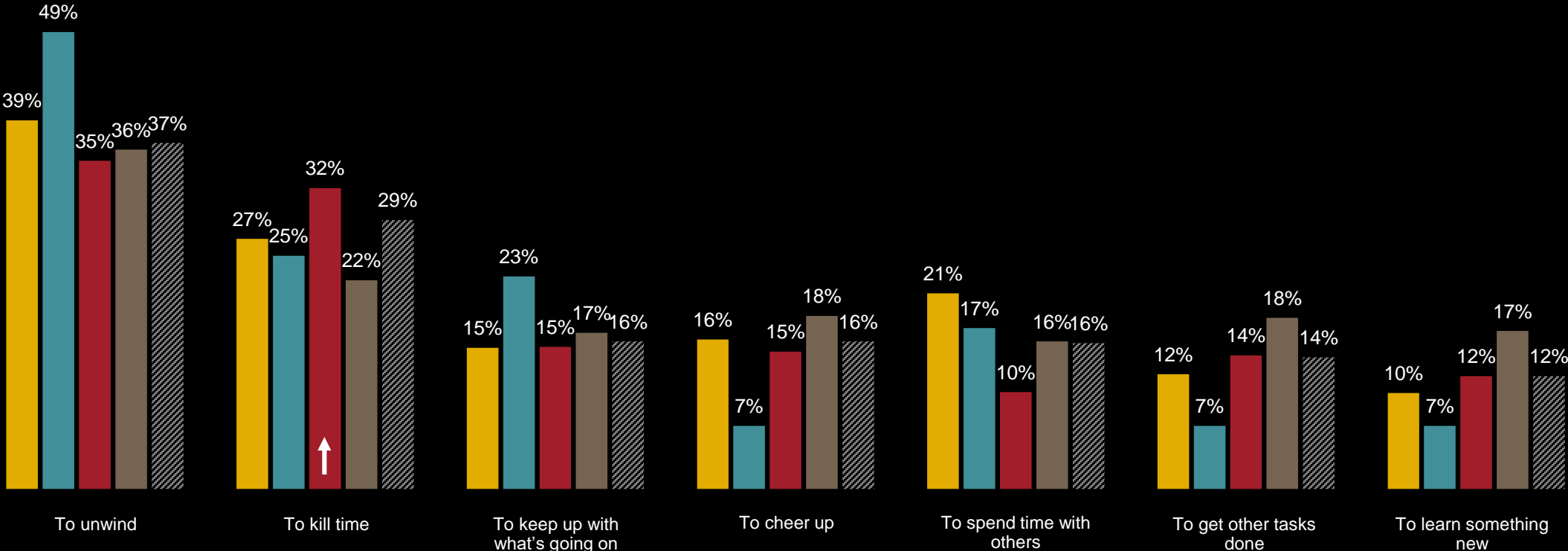
HISPANIC/LATINO VIEWERS ARE GENERALLY WATCHING ENTERTAINING GENRES, BUT THE SPANISH DOMINANT ARE MOST LIKELY TO WATCH MUSIC

CONTENT GENRE BY LANGUAGE SPOKEN | HISPANIC/LATINO | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Spanish Dominant   ■ Bilingual   ■ English Dominant
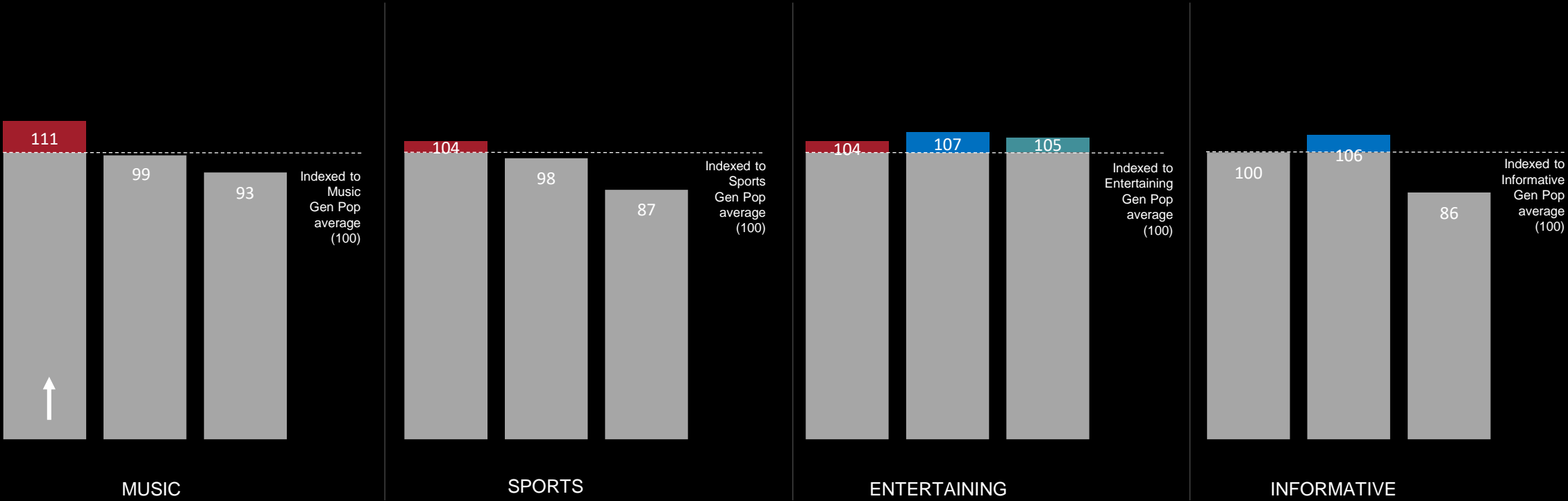
MUSIC

- 111
- 99
- 93

Indexed to Music Gen Pop average (100)

SPORTS

- 104
- 98
- 87

Indexed to Sports Gen Pop average (100)

ENTERTAINING

- 104
- 107
- 105

Indexed to Entertaining Gen Pop average (100)

INFORMATIVE

- 100
- 106
- 86

Indexed to Informative Gen Pop average (100)

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
Hispanic/Latino: Spanish Dominant n=706, Bilingual n=975, English Dominant n=1,049
Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?

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33

ENGLISH DOMINANT HISPANIC/LATINO VIEWERS WATCH FOR LONGER SESSIONS

Spanish dominant Hispanic/Latino audiences tend to watch for mid-length sessions.

SESSION LENGTH BY LANGUAGE SPOKEN | HISPANIC/LATINO | % OF VIDEO SESSIONS

■ Spanish Dominant　■ Bilingual　■ English Dominant

> 33% of total Hispanic/Latino viewers watch for sessions longer than an hour

< 30 MINS	30 - 59 MINS	> 1 HOUR

< 30 MINS
- Spanish Dominant: 33%
- Bilingual: 28%
- English Dominant: 25% ↓

30 - 59 MINS
- Spanish Dominant: 42%
- Bilingual: 37%
- English Dominant: 37%

> 1 HOUR
- Spanish Dominant: 26%
- Bilingual: 35%
- English Dominant: 38% ↑
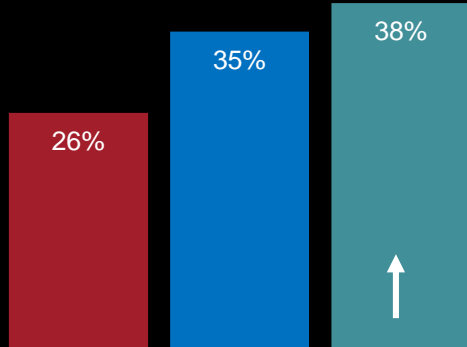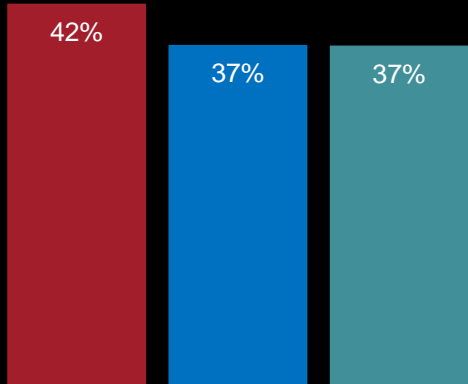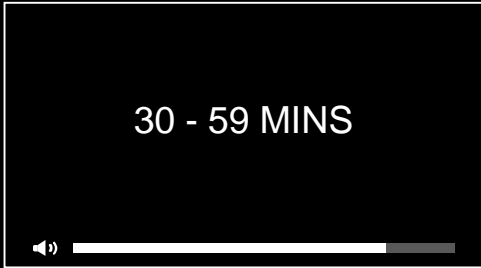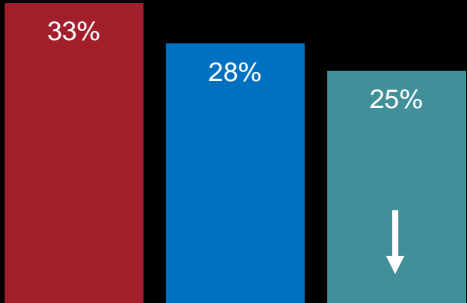
HISPANIC/LATINO AUDIENCES ARE MOST ENGAGED ON LINEAR TV

Hispanic/Latino viewers are more likely to just be watching the video and not multitasking on linear TV than other video devices, making it an optimal device to reach them in their most attentive state.

MULTI-TASKING BY DEVICE | HISPANIC/LATINO | % OF VIDEO SESSIONS

■ OTT　■ Linear TV　■ Mobile　■ PC　▨ Hispanic/Latino Video Viewer on Any Device

HIGH INVOLVEMENT (E.G. WORKING)
- OTT: 31%
- Linear TV: 23%
- Mobile: 35%
- PC: 43%
- Any Device: 35%
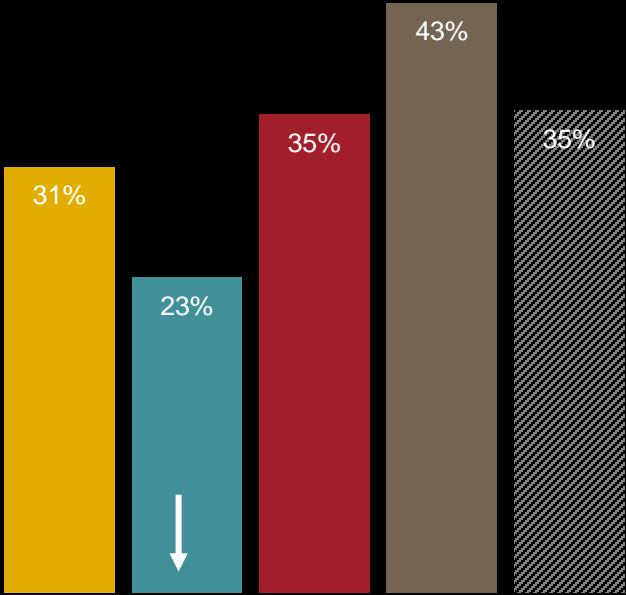
JUST WATCHING THE VIDEO
- OTT: 47%
- Linear TV: 62%
- Mobile: 37%
- PC: 45%
- Any Device: 44%
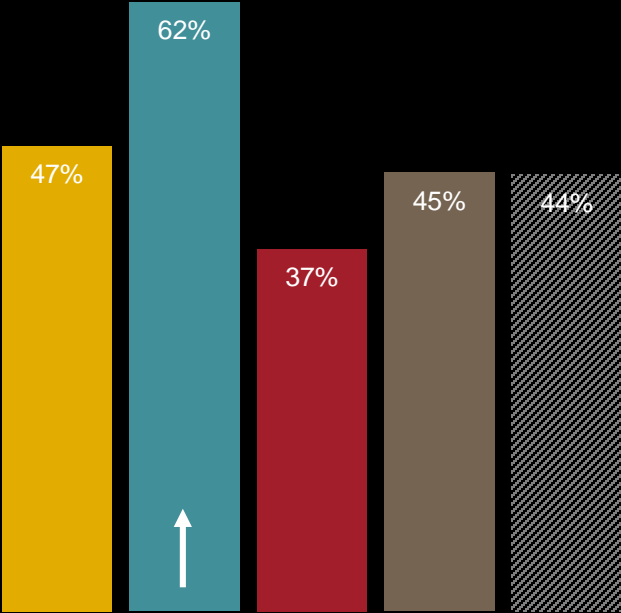
WHILE HISPANIC/LATINO VIEWERS MULTI-TASK, THEIR ATTENTION DOESN'T SUFFER

Hispanic/Latino audiences are most attentive on linear TV, but most receptive on PC.

ENGAGEMENT METRICS (TB) | HISPANIC/LATINO | % OF VIDEO SESSIONS

- 🟨 OTT
- 🟦 Linear TV
- 🟥 Mobile
- 🟫 PC
- ▨ Hispanic/Latino Video Viewer On Any Device

ATTENTION TO AUDIO + VISUAL (TB)

- 42%
- 47%
- 42%
- 34%
- 40%

AD RECEPTIVITY (TB)

- 53%
- 37%
- 53%
- 65%
- 55%
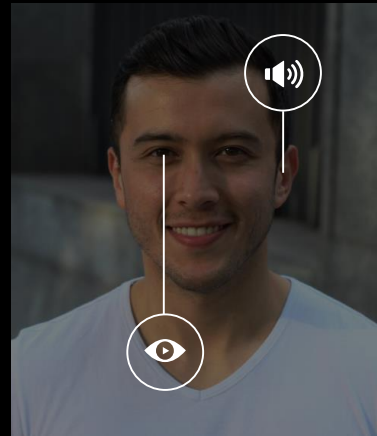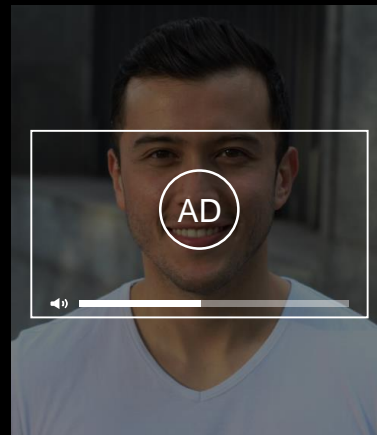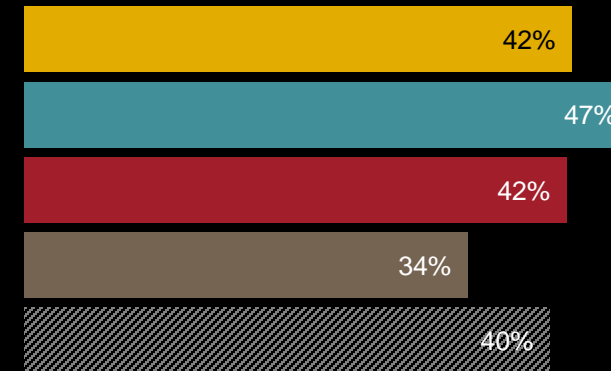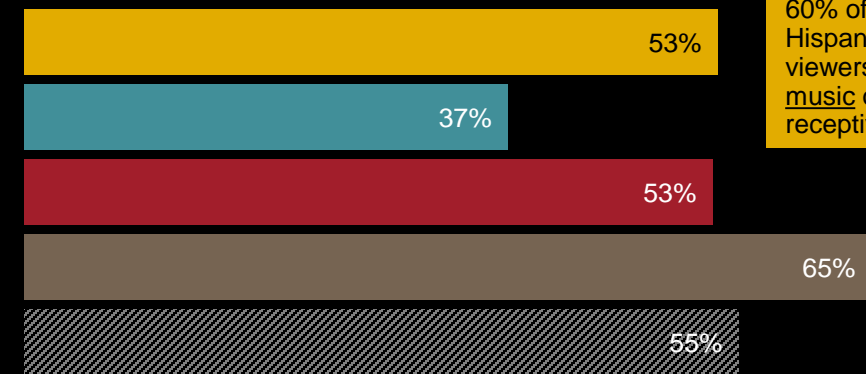
60% of Hispanic/Latino viewers watching <u>music</u> on OTT are receptive to ads

BILINGUAL AND SPANISH DOMINANT HISPANIC/LATINO VIEWERS ARE ESPECIALLY RECEPTIVE

ATTENTION TO AUDIO + VISUAL (TB)

- 41%
- 45%
- 35%

ENGAGEMENT METRICS (TB) BY LANGUAGE SPOKEN | HISPANIC/LATINO | % OF VIDEO SESSIONS

- ■ Spanish Dominant
- ■ Bilingual
- ■ English Dominant

Suggested Ad Formats:

Spanish Dominant:
- Personalized ads
- Ads that offer a free service

Bilingual
- Ads that offer ad-free viewing

English Dominant
- Ads that offer ad-free viewing

AD RECEPTIVITY (TB)

- 63%
- 60%
- 44%

TAKEAWAYS ON HISPANIC/ LATINO AUDIENCES

1 After mobile, OTT is a close second for Hispanic/Latino audiences.

2 English-speaking Hispanic/Latino viewers are more likely watching video on OTT, presenting a clear opportunity for OTT to highlight more Spanish-language content options.

3 English dominant Hispanic/Latino viewers tend to watch for longer sessions.

4 Hispanic/Latino viewers are receptive on all video devices, except linear TV, where they highly attentive to the video.

OTT: A DISTINCTIVE EXPERIENCE

NO MATTER THE RACE, OTT IS THE CO-VIEWER'S DEVICE

CO-VIEWING BY RACE/ETHNICITY | % OF VIDEO SESSIONS

■ OTT   ■ Any Device

ASIAN	BLACK/AFRICAN-AMERICAN	HISPANIC/LATINO	WHITE
52% / 33%	53% / 40%	56% / 44%	53% / 38%
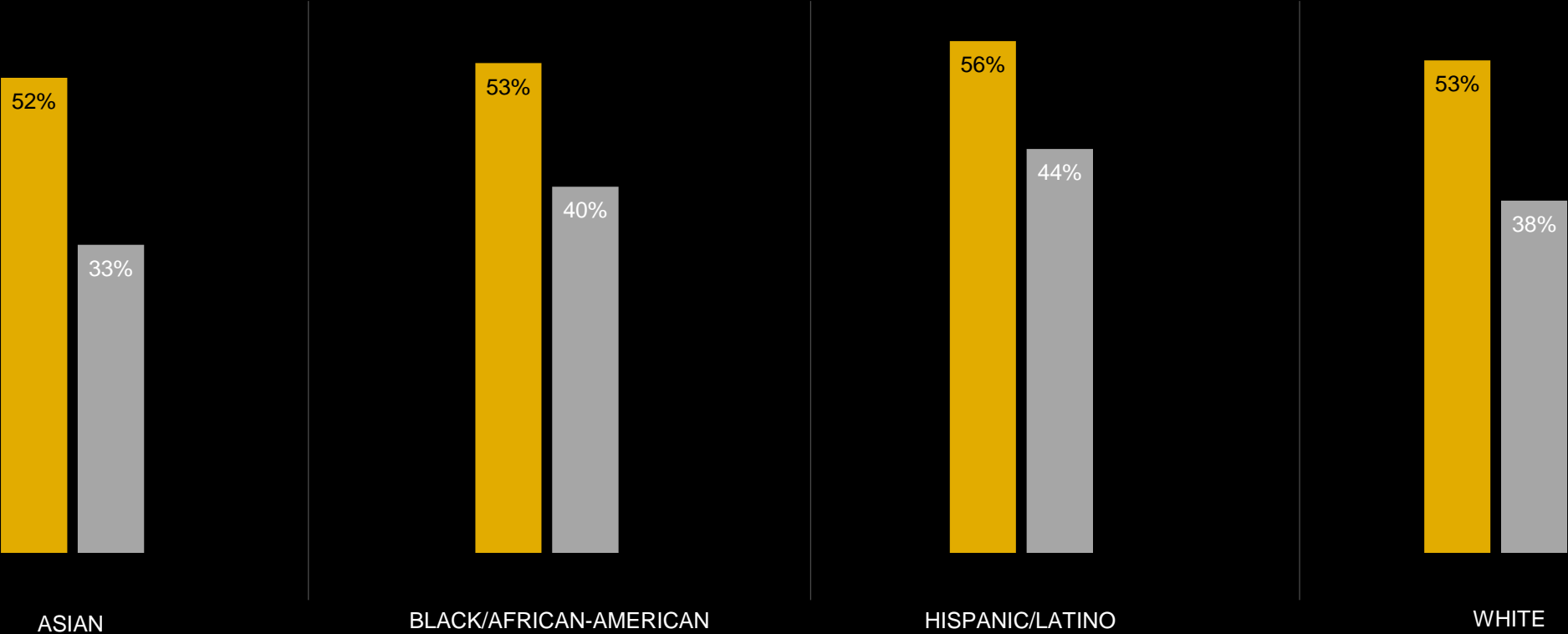
BLACK/AFRICAN-AMERICAN AND ASIAN VIEWERS ARE PARTICULARLY FOCUSED ON OTT

JUST WATCHING THE VIDEO BY RACE/ETHNICITY | OTT | % OF VIDEO SESSIONS

- ▉ Asian
- ▉ Black/African-American
- ▉ Hispanic/Latino
- ▉ White
- ▨ Gen Pop Video Viewer

55% 49% 47% 50% 47%
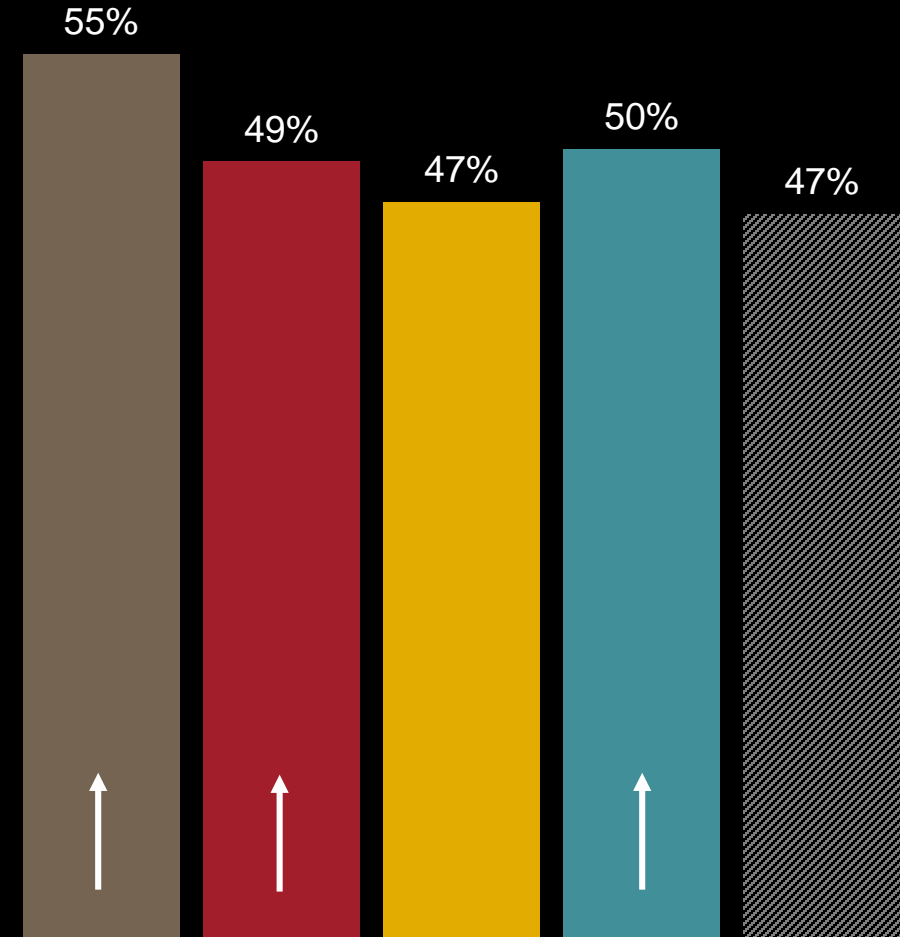
YOU CAN REACH BLACK/AFRICAN-AMERICAN AND ASIAN AUDIENCES IN POSITIVE MOODS ON OTT

MOOD BY RACE/ETHNICITY | OTT | % OF VIDEO SESSIONS

■ Asian ■ Black/African-American ■ Hispanic/Latino ■ White ▨ Gen Pop Video Viewer

	HAPPY	TIRED
Asian	22%	11%
Black/African-American	18%	8%
Hispanic/Latino	17%	11%
White	15%	14%
Gen Pop Video Viewer	16%	13%
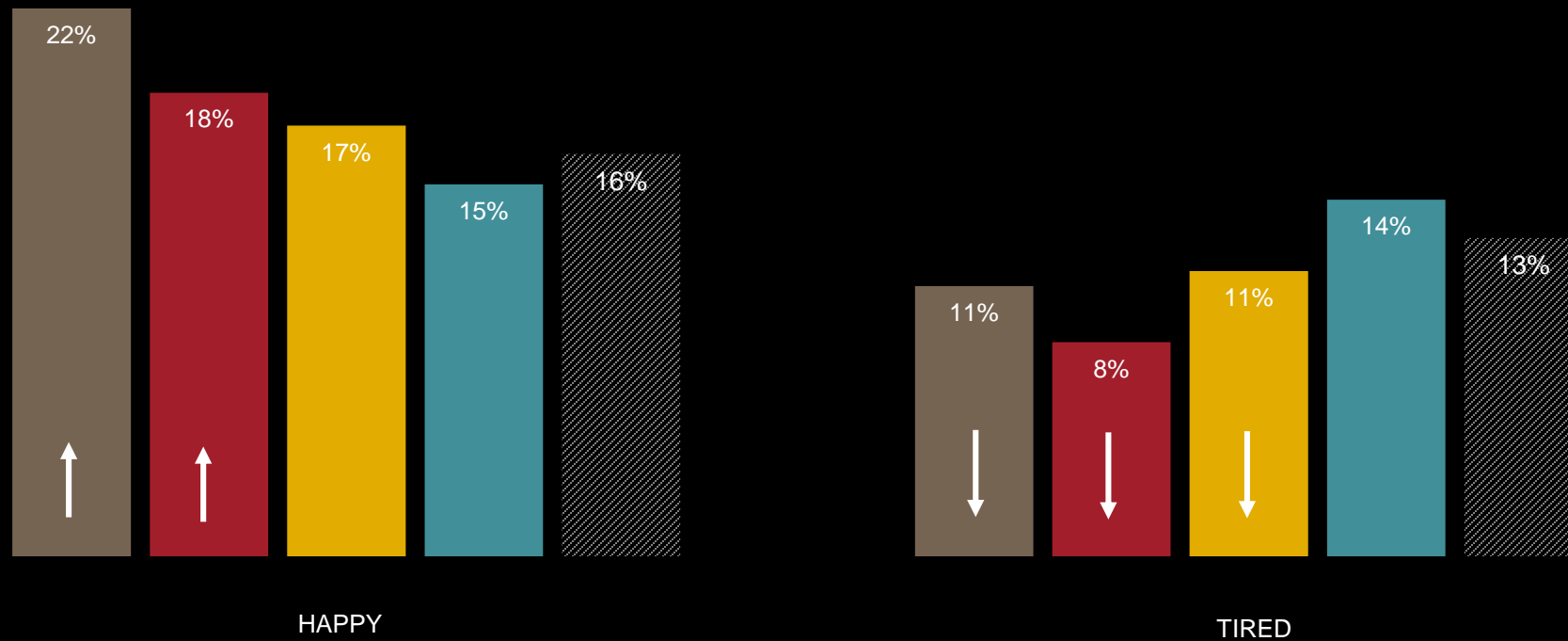
ASIAN AUDIENCES ARE LESS LIKELY TO BE MULTI-TASKING ON OTT

**MULTI-TASKING (HIGH DISTRACTION ACTIVITIES*)
BY RACE/ETHNICITY | OTT | % OF VIDEO
SESSIONS**

■ Asian
■ Black/African-American
■ Hispanic/Latino
■ White
▨ Gen Pop Video Viewer

24%   32%   31%   26%   31%
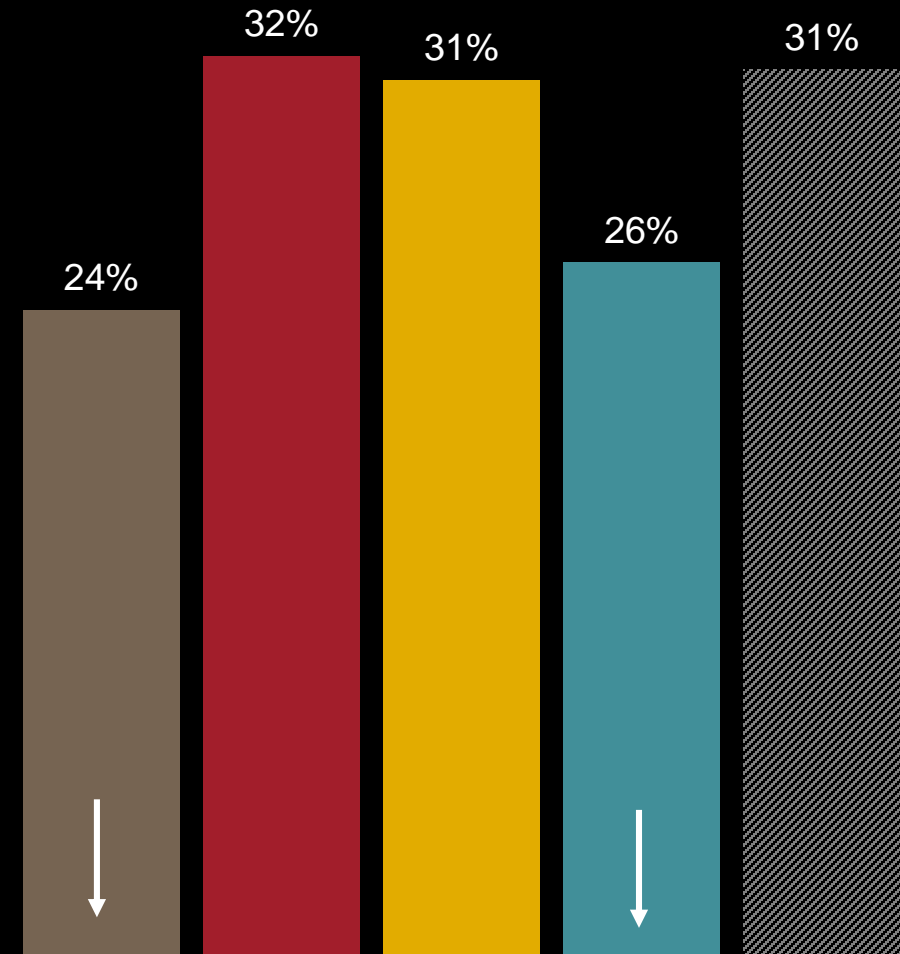
OTT + MUSIC = PRIME VIDEO SESSION, ESPECIALLY FOR ASIAN VIEWERS

AD RECEPTIVITY (TB) BY RACE/ETHNICITY | OTT | % OF VIDEO SESSIONS

- OTT
- Music + OTT
- Race/Ethnicity Average

ASIAN: 49%, 70%, 49%
BLACK/AFRICAN-AMERICAN: 63%, 65%, 58%
HISPANIC/LATINO: 53%, 60%, 55%
WHITE: 49%, 64%, 51%

TAKEAWAYS ON OTT

1 OTT is a co-view friendly device. Regardless of race/ethnicity, people are likely co-viewing on OTT.

2 Black/African-American and Asian audiences are particularly focused when watching video on OTT than other devices.

3 People tend to be in happier moods on OTT, making it an optimal device to reach viewers.

4 Music + OTT = the prime video session for ads.
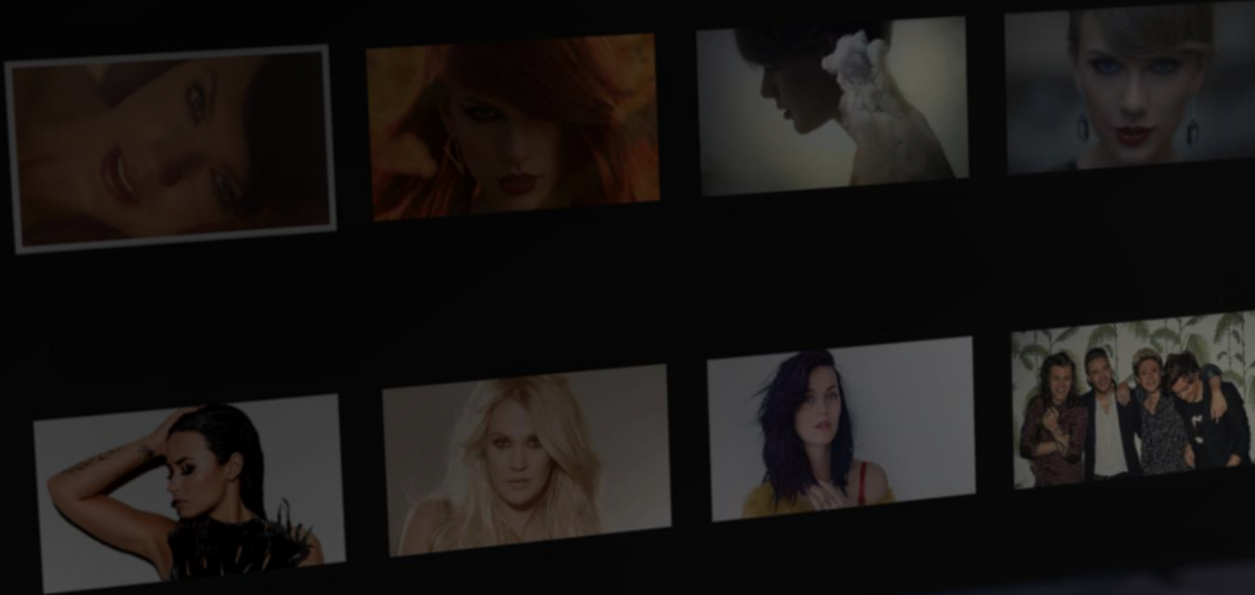
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CULTURAL RELEVANCE

RESEARCH FROM IDENTITY HAS HELPED FRAME OUR IDEAS ON THE POWER OF CULTURE

Identity's proprietary studies Cultural Dimensions and Wave X - Remix Culture have solidified hypotheses surrounding culture's impact on a micro and macro level

THE POWER OF CULTURE

CULTURE UNDOUBTEDLY PLAYS A KEY ROLE IN EVERYDAY CONSUMPTION

IMPACT OF CULTURE | % AGREE

■ Asian   ■ Black/African-American   ■ Hispanic/Latino   ■ White   ▨ Gen Pop

"I AM INTERESTED IN ENTERTAINMENT THAT FEATURES OTHER CULTURES" | % AGREE

- Asian: 53%
- Black/African-American: 62%
- Hispanic/Latino: 64%
- White: 52%
- Gen Pop: 54%
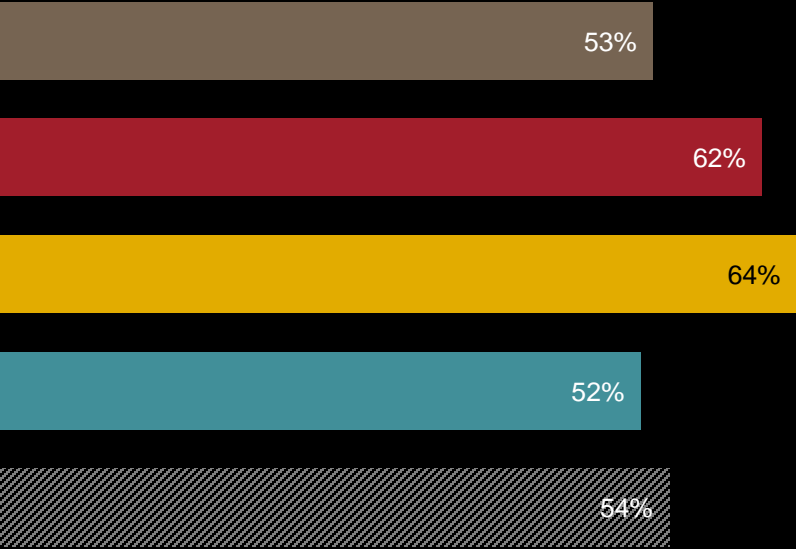
"I HAVE EMBRACED ASPECTS FROM OTHER CULTURES (E.G. FOOD, MUSIC, DANCE, ETC.) AND HAVE ADOPTED THEM AS PART OF MY REGULAR CONSUMPTIONS" | % AGREE

- Asian: 56%
- Black/African-American: 52%
- Hispanic/Latino: 63%
- White: 48%
- Gen Pop: 50%
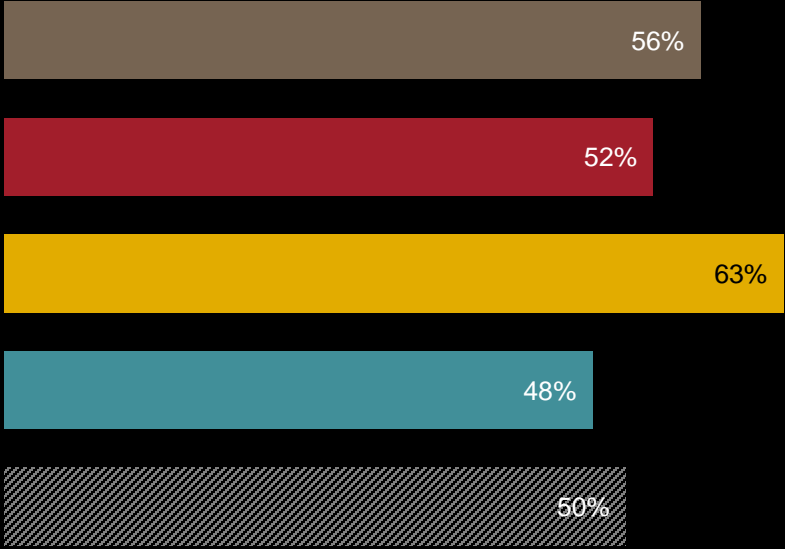
ETHNIC CULTURE IS DRIVING MAINSTREAM CULTURE

**AT LEAST 2-IN-5 AMERICANS SEE MULTICULTURAL/ETHNIC AUDIENCES AS
STRONG INFLUENCERS OF THE FOLLOWING PASSION POINTS:**

Food	Music	Fashion	TV Shows	Movies	Beauty	Sports	Haircare	Dance	Technology	Art	Politics
64%	55%	50%	49%	49%	47%	46%	45%	45%	43%	43%	42%
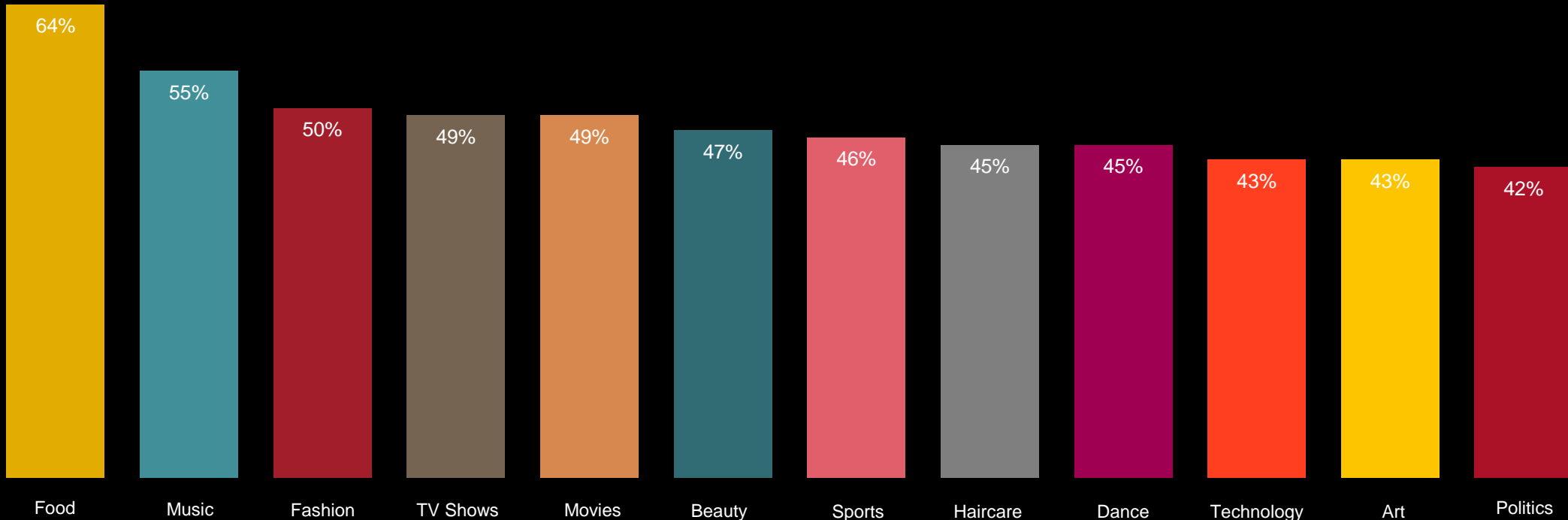
WHILE SOCIAL MEDIA PLATFORMS INFLUENCE WORLD OPINION, VISUAL CONTENT PLATFORMS INTRODUCE CULTURAL TRENDS

"IT INFLUENCES WORLD OPINION" –
TOP 5 SOCIAL PLATFORMS | % AGREE
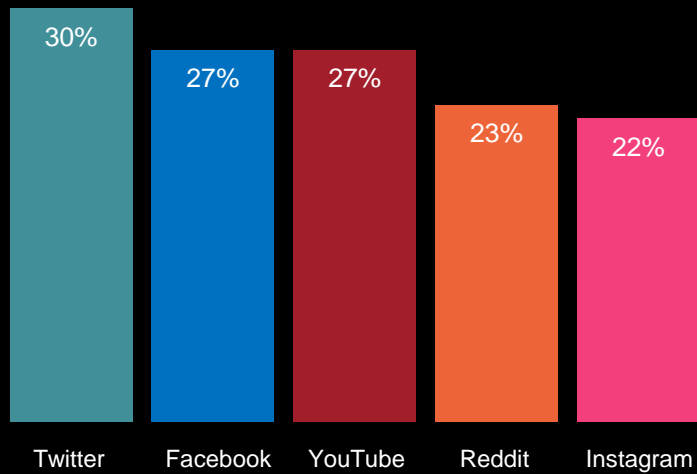
"IT INTRODUCES ME TO NEW CULTURAL TRENDS" –
TOP 5 SOCIAL PLATFORMS | % AGREE

Twitter	Facebook	YouTube	Reddit	Instagram
30%	27%	27%	23%	22%

YouTube	Pinterest	Instagram	Twitter	Reddit
28%	28%	27%	23%	22%
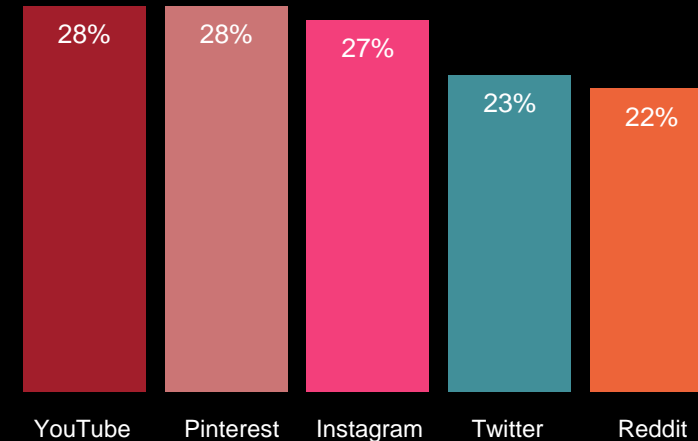
WE KNOW THAT CULTURE HAS THE POWER TO INFLUENCE CONSUMPTION HABITS...

SO WHAT IS THE SPECIFIC IMPACT OF PERSONAL CULTURAL RELEVANCE ON PEOPLE?

Videos that are culturally relevant to you are videos that align well with your personal identity via language, ethnicity, nationality, etc.

PEOPLE GRAVITATE TOWARDS VIDEOS THAT ARE CULTURALLY RELEVANT TO THEM...

OVERALL SHARE OF CULTURAL RELEVANCE | % OF GEN POP VIDEO SESSIONS

46%
HIGH CULTURAL
RELEVANCE (7-10)

22%
LOW
CULTURAL
RELEVANCE (0-3)

32%
MODERATE
CULTURAL
RELEVANCE (4-6)
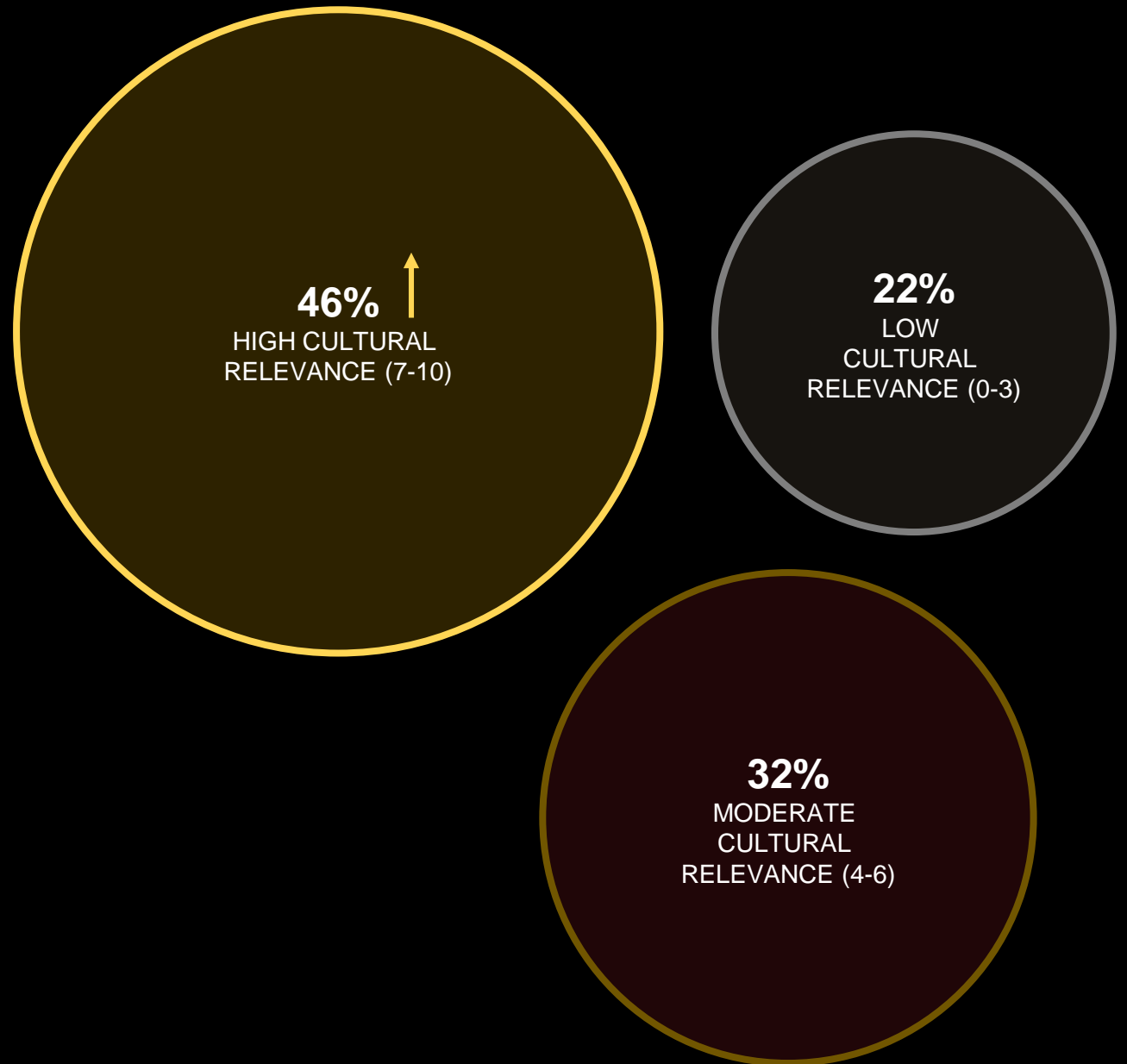
...AND THEY'RE DEVICE AGNOSTIC WHEN WATCHING CULTURALLY RELEVANT CONTENT

DEVICE SELECTION BY PERCEIVED CULTURAL RELEVANCE OF CONTENT | % OF GEN POP VIDEO SESSIONS

■ Low Cultural Relevance (0-3)　　■ Moderate Cultural Relevance (4-6)　　■ High Cultural Relevance (7-10)

OTT: 21%, 33%, 47%
LINEAR TV: 27%, 24%, 49%
MOBILE: 24%, 34%, 43%
PC: 20%, 30%, 50%

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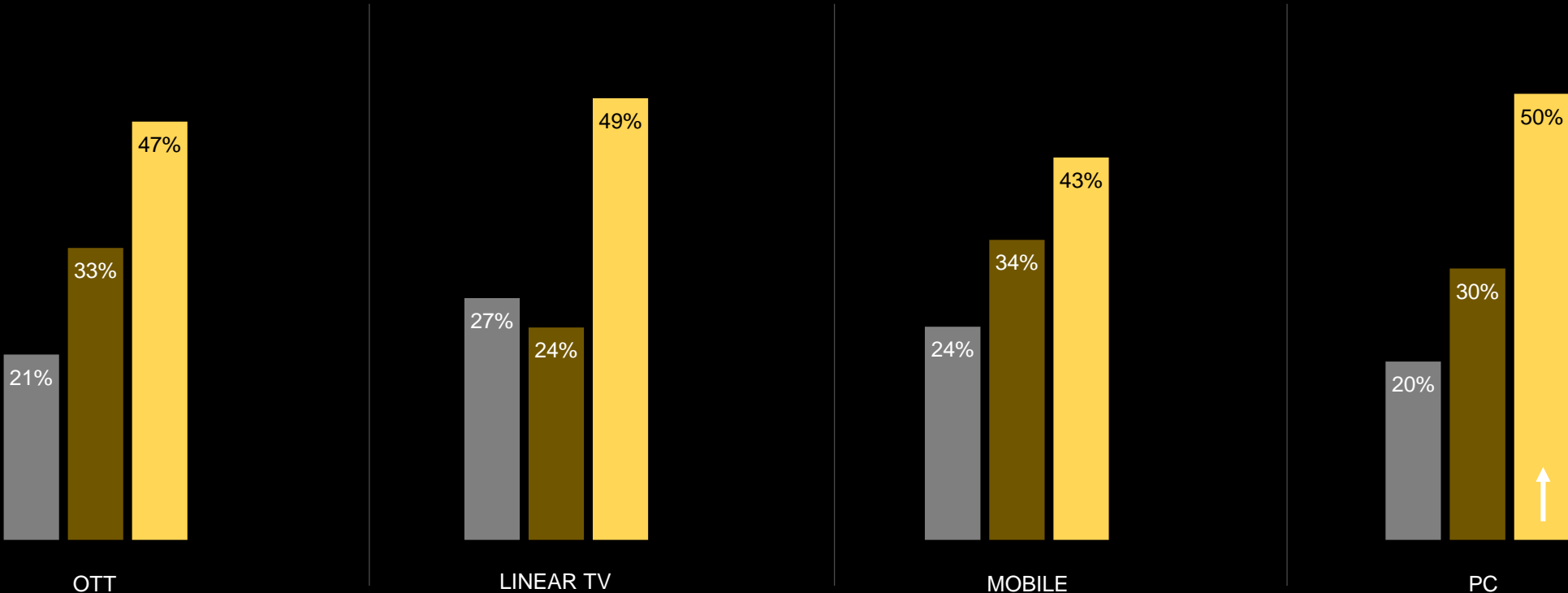
IN GENERAL, GENERATIONS DON'T DISCRIMINATE WHEN IT COMES TO CULTURALLY RELEVANT VIDEOS

PERCEIVED CULTURAL RELEVANCE OF CONTENT BY GENERATION | % OF GEN POP VIDEO SESSIONS

■ Low Cultural Relevance (0-3)   ■ Moderate Cultural Relevance (4-6)   ■ High Cultural Relevance (7-10)

GEN Z: 30%, 33%, 38%

MILLENNIAL: 19%, 33%, 48%

GEN X: 21%, 30%, 49%
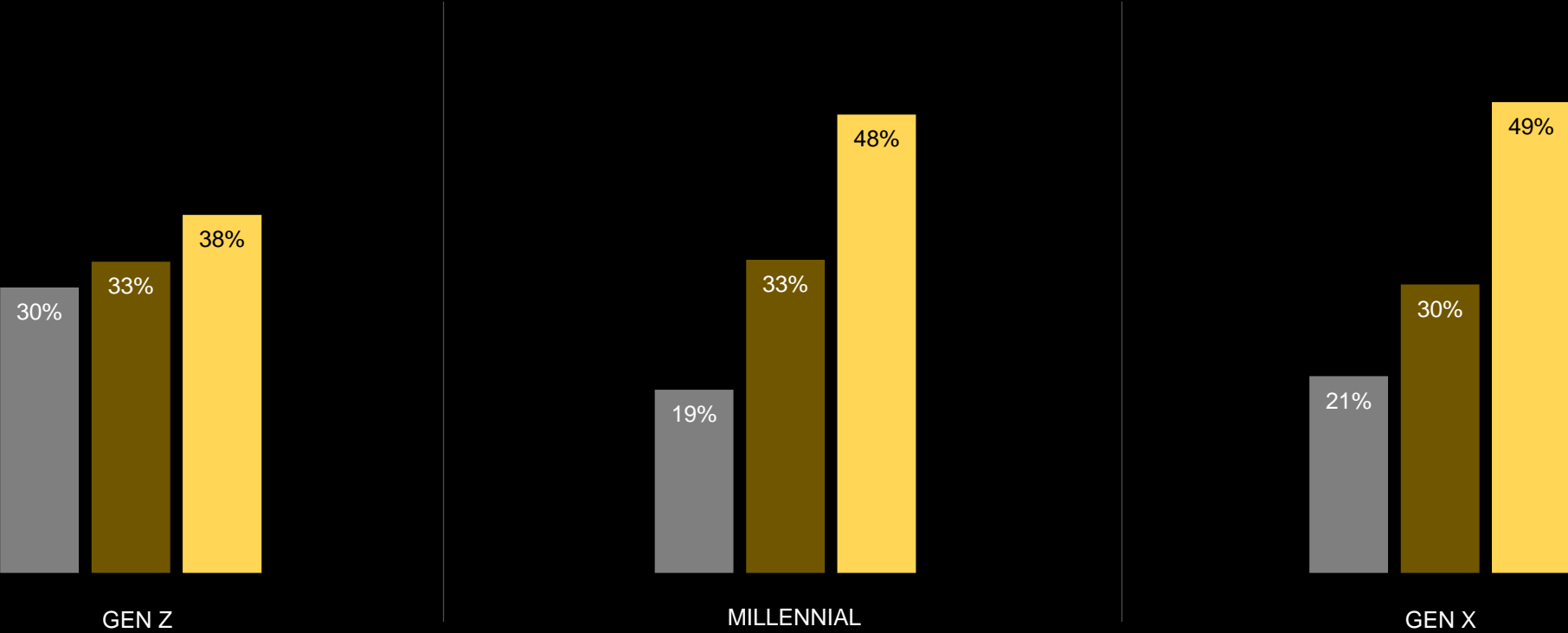
BUT YOUNGER VIEWERS ARE LEAN-BACK AND OLDER VIEWERS ARE LEAN-FORWARD

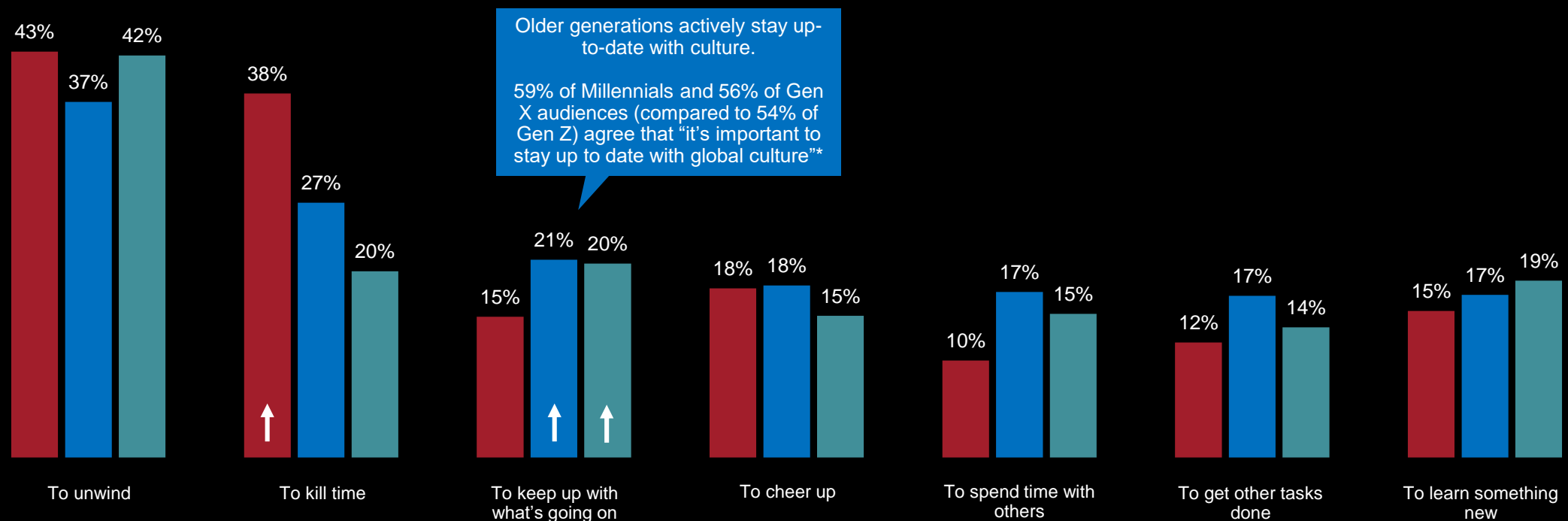**MOTIVATION FOR CONTENT SELECTION BY GENERATION | HIGHLY CULTURALLY RELEVANT CONTENT (7-10) | % OF GEN POP VIDEO SESSIONS**

■ Gen Z (A13-21)   ■ Millennials (A22-37)   ■ Gen X (A38-54)

Older generations actively stay up-to-date with culture.

59% of Millennials and 56% of Gen X audiences (compared to 54% of Gen Z) agree that "it's important to stay up to date with global culture"*

To unwind: 43% / 37% / 42%

To kill time: 38% / 27% / 20%

To keep up with what's going on: 15% / 21% / 20%

To cheer up: 18% / 18% / 15%

To spend time with others: 10% / 17% / 15%

To get other tasks done: 12% / 17% / 14%

To learn something new: 15% / 17% / 19%

HIGHLY CULTURAL VIEWING SESSIONS = LONGER PERIODS

SESSION LENGTH BY RACE/ETHNICITY | HIGHLY CULTURALLY RELEVANT CONTENT (7-10) | % OF GEN POP VIDEO SESSIONS

▨ Asian ■ Black/African-American ■ Hispanic/Latino ■ White ▨ Gen Pop Video Viewer

< 30 MINS

Asian 26%
Black/African-American 26%
Hispanic/Latino 28%
White 27%
Gen Pop Video Viewer 27%

30 - 59 MINS

Asian 43%
Black/African-American 30%
Hispanic/Latino 35%
White 37%
Gen Pop Video Viewer 36%

> 1 HOUR

Asian 31%
Black/African-American 44%
Hispanic/Latino 37%
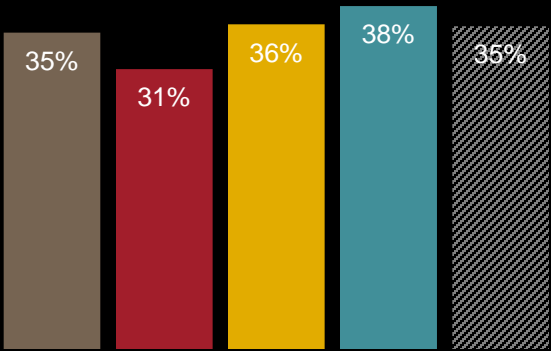White 36%
Gen Pop Video Viewer 37%
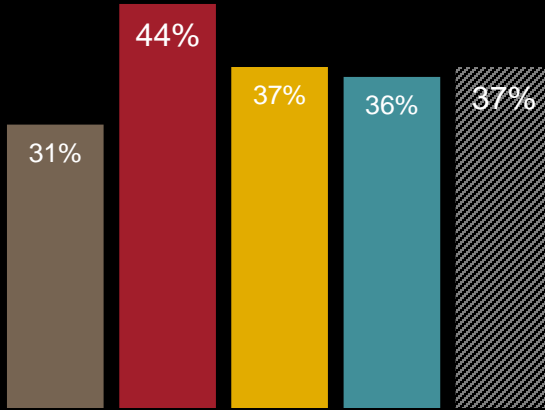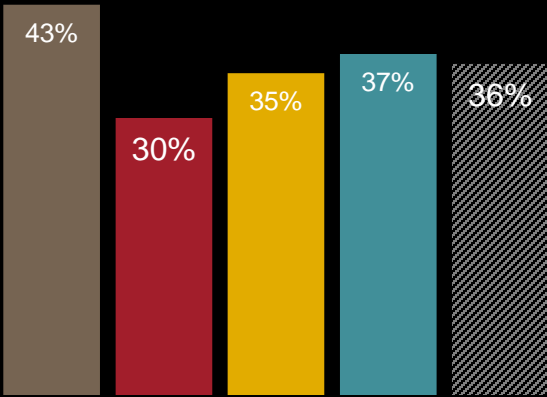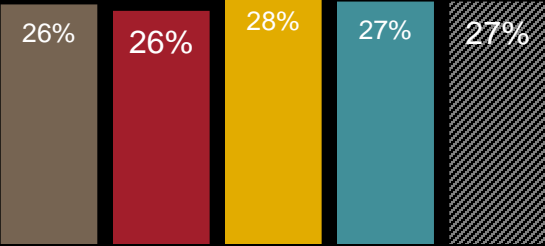
MOST ETHNICITIES ARE BINGE-WATCHING CONTENT FROM THE SAME CREATOR

On the other hand, Black/African-American audiences are more likely to watch binge-watch videos from the same genre, but different series and content creators.
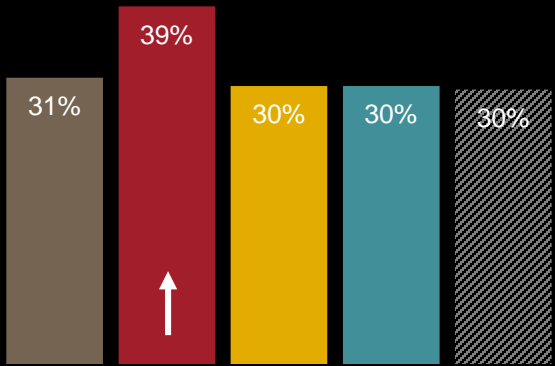
TYPE OF BINGE-VIEWING BY RACE/ETHNICITY | HIGHLY CULTURALLY RELEVANT CONTENT (7-10) | % OF GEN POP VIDEO SESSIONS

■ Asian   ■ Black/African-American   ■ Hispanic/Latino   ■ White   ▨ Gen Pop Video Viewer

MULTIPLE VIDEOS FROM THE SAME SERIES, CONTENT CREATOR, OR CHANNEL

- Asian: 35%
- Black/African-American: 31%
- Hispanic/Latino: 36%
- White: 38%
- Gen Pop Video Viewer: 35%

MULTIPLE VIDEOS FROM THE SAME GENRE, BUT DIFFERENT SERIES, CONTENT CREATORS, OR CHANNELS

- Asian: 31%
- Black/African-American: 39% ↑
- Hispanic/Latino: 30%
- White: 30%
- Gen Pop Video Viewer: 30%

MULTIPLE VIDEOS ACROSS A VARIETY OF GENRES

- Asian: 34%
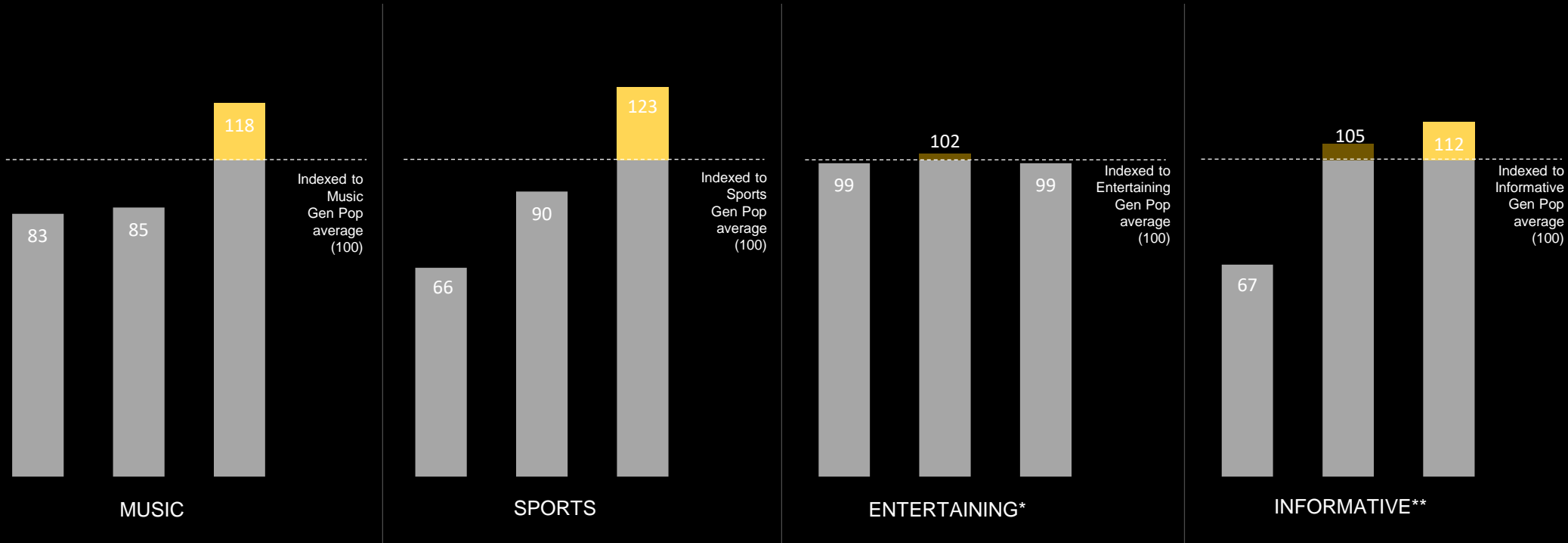- Black/African-American: 29%
- Hispanic/Latino: 30%
- White: 30%
- Gen Pop Video Viewer: 32%
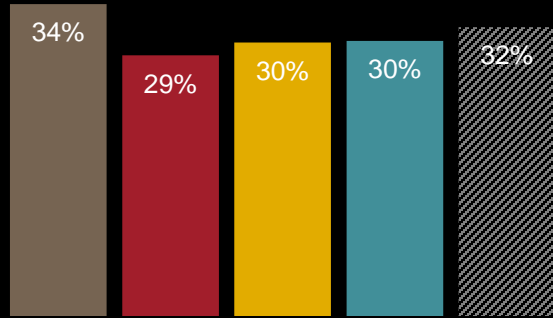
MUSIC AND SPORTS CONTENT = CULTURALLY RELEVANT

SHARE OF CULTURAL RELEVANCE BY GENRE | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Low Cultural Relevance (0-3)　　■ Moderate Cultural Relevance (4-6)　　■ High Cultural Relevance (7-10)

MUSIC: 83, 85, 118 — Indexed to Music Gen Pop average (100)

SPORTS: 66, 90, 123 — Indexed to Sports Gen Pop average (100)

ENTERTAINING*: 99, 102, 99 — Indexed to Entertaining Gen Pop average (100)

INFORMATIVE**: 67, 105, 112 — Indexed to Informative Gen Pop average (100)

CULTURAL RELEVANCE MAY NOT BE A PRIORITY FOR ASIAN VIEWERS, EXCEPT WHEN WATCHING MUSIC CONTENT

SHARE OF CULTURAL RELEVANCE BY GENRE | ASIAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Low Cultural Relevance (0-3)　　■ Moderate Cultural Relevance (4-6)　　■ High Cultural Relevance (7-10)

MUSIC
- 76
- 104
- 108

Indexed to Music Gen Pop average (100)

SPORTS
- 72
- 118
- 101

Indexed to Sports Gen Pop average (100)

ENTERTAINING*
- 106
- 111
- 89

Indexed to Entertaining Gen Pop average (100)

INFORMATIVE**
- 101
- 120
- 86

Indexed to Informative Gen Pop average (100)

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CULTURAL RELEVANCE IS KEY WHEN RESONATING WITH BLACK/AFRICAN-AMERICAN VIDEO VIEWERS

SHARE OF CULTURAL RELEVANCE BY GENRE | BLACK/AFRICAN-AMERICAN | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Low Cultural Relevance (0-3)　　■ Moderate Cultural Relevance (4-6)　　■ High Cultural Relevance (7-10)

MUSIC
- 52
- 84
- 134
- Indexed to Music Gen Pop average (100)

SPORTS
- 37
- 112
- 122
- Indexed to Sports Gen Pop average (100)

ENTERTAINING*
- 84
- 104
- 105
- Indexed to Entertaining Gen Pop average (100)

INFORMATIVE**
- 45
- 118
- 113
- Indexed to Informative Gen Pop average (100)

*Entertaining genres include: Action, Comedy, Drama, Family, Gaming, Game/Talk Shows, Mystery, Pet or Animal, Reality (e.g. reality shows, personal live streams), True Crime
**Informative genres include: Business, Cooking or Home Design, How-To/DIY, News & Politics, Science/Technology/Educational
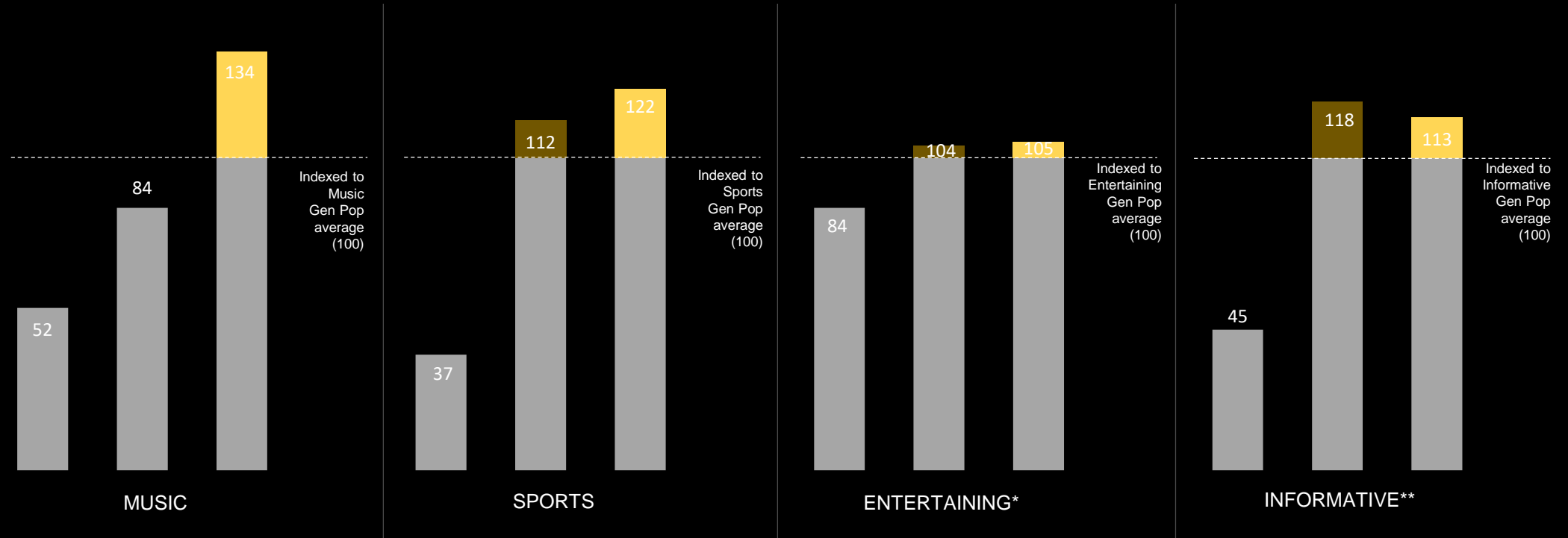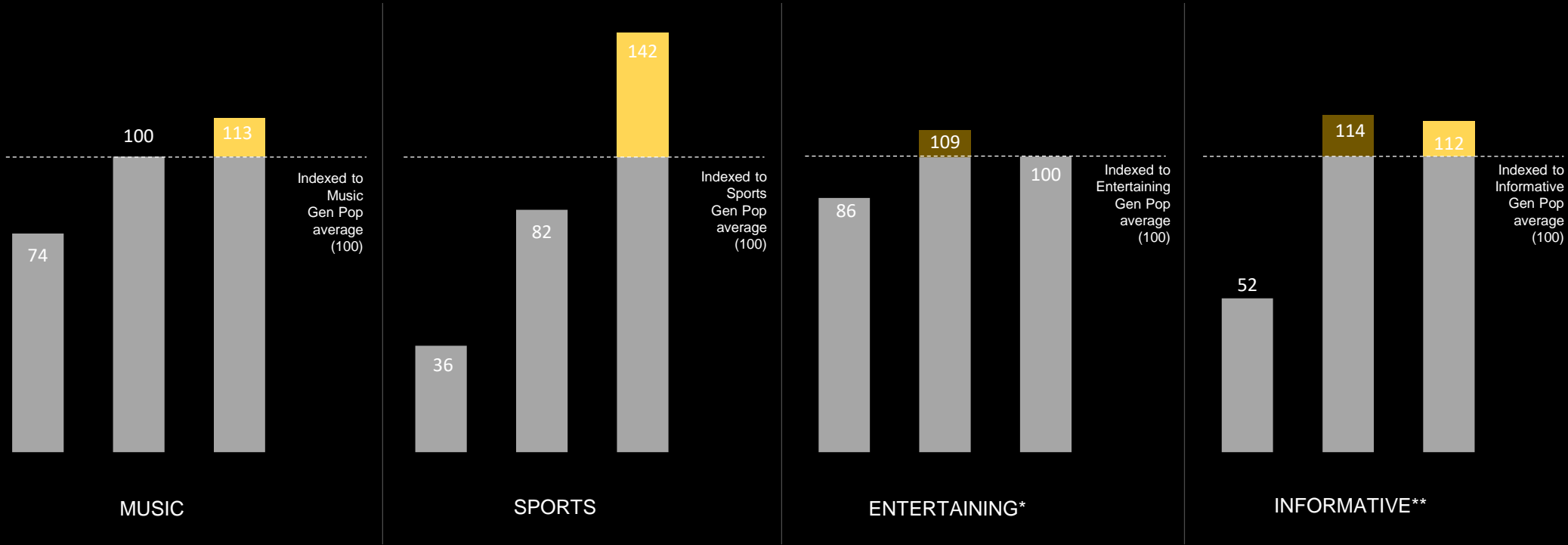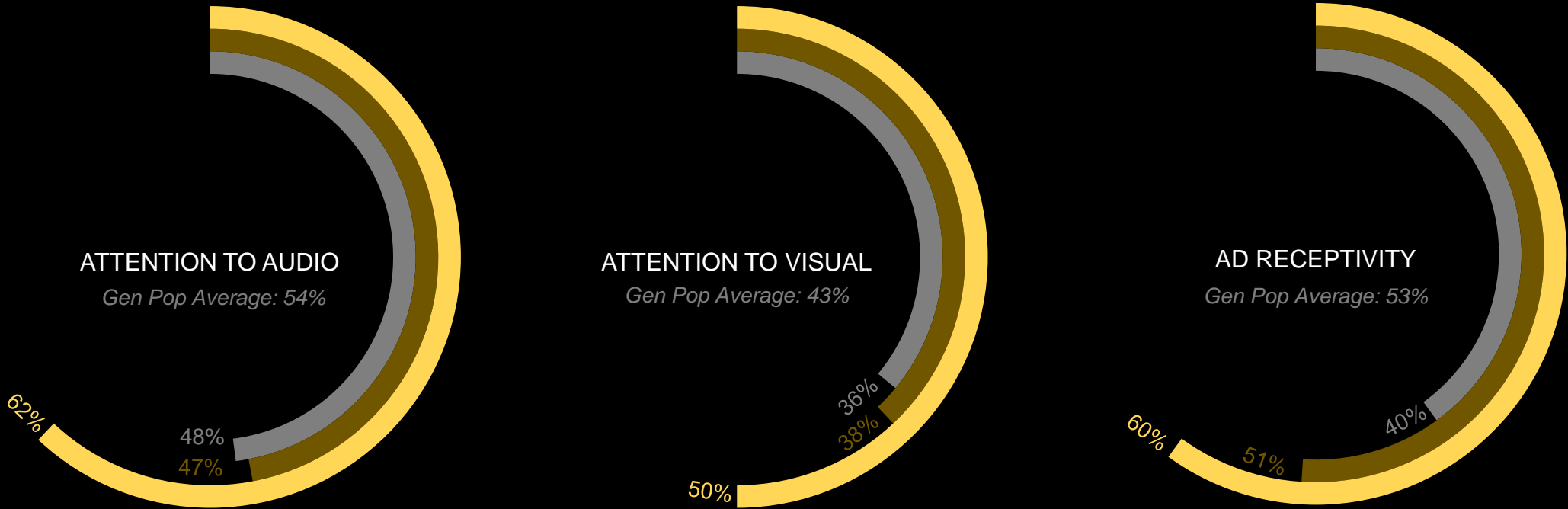Black/African-American n=2,383
Q: Which video genre(s) did you play during your video session on a [device] that began yesterday at [time]?

SPORTS CONTENT IS ESPECIALLY CULTURALLY RELEVANT TO HISPANIC/LATINO AUDIENCES

SHARE OF CULTURAL RELEVANCE BY GENRE | HISPANIC/LATINO | INDEXED TO GEN POP CATEGORY AVERAGE (100)

■ Low Cultural Relevance (0-3)   ■ Moderate Cultural Relevance (4-6)   ■ High Cultural Relevance (7-10)

MUSIC: 74, 100, 113 — Indexed to Music Gen Pop average (100)

SPORTS: 36, 82, 142 — Indexed to Sports Gen Pop average (100)

ENTERTAINING*: 86, 109, 100 — Indexed to Entertaining Gen Pop average (100)

INFORMATIVE**: 52, 114, 112 — Indexed to Informative Gen Pop average (100)

CULTURALLY RELEVANT CONTENT = ENGAGED VIDEO AUDIENCES

ENGAGEMENT METRICS (TB) BY PERCEIVED CULTURAL RELEVANCE OF CONTENT | % OF GEN POP VIDEO SESSIONS

■ Low Cultural Relevance (0-3)　　■ Moderate Cultural Relevance (4-6)　　■ High Cultural Relevance (7-10)

ATTENTION TO AUDIO
Gen Pop Average: 54%

62%
48%
47%

ATTENTION TO VISUAL
Gen Pop Average: 43%

36%
38%
50%

AD RECEPTIVITY
Gen Pop Average: 53%

60%
40%
51%

TAKEAWAYS ON CULTURAL RELEVANCE

1 Cultural relevance is key when watching videos, no matter what device they're watching on.

2 Cultural relevance may not be a key factor in video viewing for Asian audiences, except when watching music genres.

3 For Black/African-American and Hispanic/Latino audiences, cultural relevance comes out on top, especially with music or sports genres.

4 You can reach viewers in their most engaged state when they're watching videos that relate to them culturally – they're attentive <u>and</u> receptive.

THANK YOU