



# A Day in the Life of Video Viewers

The influence of consumer motivations/mindset on digital video and ad receptivity

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# Acknowledgements

## Acknowledgements

This report would not have been possible without oversight from the IAB Video Center of Excellence board members, the collaboration and financial support of our sponsors, and the research expertise of our commissioned partner, listed below.

The final report, findings and recommendations were not influenced by sponsors.

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## Commissioned Partner

maru/matchbox

# Objective, Outcome & Methodology

## Objective:

This study was designed to help illuminate:

1. How consumer digital viewing habits—i.e., the motivations and mindset which lead them to video watching—impact their receptivity to advertising
  - ✓ Contextual Relevance
  - ✓ Mindset/Motivation Relevance
  - ✓ Behavioral Relevance
  - ✓ Demo Relevance
  - ✓ General, Untargeted
2. Identify any existing correlations between video and ad attention/relevance/receptivity

## Outcome:

- ✓ Why is this important to publishers?
- ✓ How can advertisers use this information?

Research results will provide both insight and guidance to advertisers and publishers for creation and delivery of messaging.

## Methodology:

- An online survey was fielded among online panel (~250,000 US members)
- The total sample included
  - 1,544 U.S. consumers
  - ages 13+
  - representative of Census
- Field dates: 3/19/19-3/27/19

# A Day in the Life of Video Viewers

## Study Introduction

This study delves into how consumers really watch digital video – beyond dayparts, demos and/or personas. It illuminates how perception of different types of video advertising is impacted by the motivations and mindset a consumer is experiencing as they choose to watch.

The research results are demonstrated through six categories representing 11 different motivations/mindsets. These categories are mapped to video types viewed and by device used. The analysis provides correlations between video content and attention to ads, ad relevance and ad receptivity when in these motivation/mindset states.

Overarching findings show that video viewing motivations/mindsets change throughout the day—as one would expect. And as consumers move between these states, their ad receptivity changes. Contextual, behavioral and demographics all have impact on ad receptivity within the context of motivation and mindset. Consumers report having different preferences for ad relevance types when experiencing different motivations/mindsets (e.g., one might prefer contextually vs. behaviorally relevant ads—or be open to completely untargeted ads—given their typical motivation/mindset when watching particular digital video types).

The results are intended to help marketers and ad sellers better understand ways in to leverage video viewing opportunities by consumer intent and preference, setting up a foundation for better ad testing and optimization of delivery.

Motivation/Mindset Description	
<b>Relaxation</b>	To relax at the end of the day/during free time
<b>Appointment</b>	I have planned to watch alone
	I have planned to watch with others
<b>Spontaneous</b>	I stumble-upon or get pulled into watching
	To spontaneously view/share with others
	To catch up on popular/viral videos
<b>Escapist</b>	To take a break during the day
	To pass time while traveling
<b>Educational</b>	To learn a new skill
	To help me with a project/task
<b>Informative</b>	To get ready for the day

Ad Relevance				
<b>Contextual Relevance</b>	<b>Mindset/Motivation Relevance</b>	<b>Behavioral Relevance</b>	<b>Demo Relevance</b>	<b>General, Untargeted</b>

# General Findings

The following general insights were identified during analysis of this study and should be kept in mind:

74% of U.S. consumers age 13+ watch streaming/online video at least weekly

- 41% watch daily+

Younger online video viewers (13-17) watch digital video much more frequently than older segments

- Nearly 5x as many in the 18-34 age range stream daily vs those 55+ adults

On average, Weekly Online Video Viewers:

- Watch video while experiencing 3+ motivations/mindset states each day
- Watch while in 7+ motivations/mindset states each week

# Key Findings: Motivations, Mindset & Content

- Nearly 90% of weekly online video viewers say that they stream to relax at the end of the day/during free time—the highest percentage of any motivation/mindset
  - Males are more likely to watch video to pass the time while traveling or to help them with a particular project (females do not over index for any particular state)
- Overall, consumers are most attentive to content when they are preparing for the day, learning a new skill or working on a task/project
  - The younger the audience, the more likely they are to report watching digital video when experiencing particular motivations or in a particular mindset. For example, 18-34s over index when in the following states: Spontaneous, Escapist, and when Appointment Viewing

# Key Findings: Content + Ads

- Digital video viewers are significantly more attentive to both content and ads when watching Educational videos
- When content attention is in “background” mode (e.g., to relax or be entertained), ad attention is higher

# Key Findings: Ad Specific

- Nearly 80% of digital video viewers accept free content as a value exchange for watching advertising
- Overall, consumers are highly attentive to ads when they are preparing for the day, learning a new skill or working on a project
- More digital video viewers—56%—say that they prefer ads related to the content they're watching than other choices (e.g., receiving a supermarket ad when watching a cooking video vs other motivations/mindsets)
- And receiving a contextually relevant ad increases ad receptivity
- An average of 37% of consumers surveyed reported that ad receptivity increases when their preferred ad type is delivered for that particular motivation/mindset
- Overall, consumers say they prefer content relevant video ads. However, other types of relevance can be effectively leveraged for ad delivery given the right time and device, including: motivations/mindset, behavioral based, demographics and untargeted ads



# Key Findings: Ad & Devices

- When examining devices: consumers viewing on smartphone, tablet and computer prefer short or skippable ads; Connected TV viewers prefer short ads
- “Countdown” ads are less important to all digital video viewers surveyed

# Introduction to Motivation & Mindsets

Consumer Motivation and Mindset states have been studied to determine which might increase ad receptivity while watching digital video:

Motivation/Mindset	Description
Relaxation	To relax at the end of the day/during free time
Appointment	I have planned to watch alone
	I have planned to watch with others
Spontaneous	I stumble-upon or get pulled into watching
	To spontaneously view/share with others
	To catch up on popular/viral videos
Escapist	To take a break during the day
	To pass time while traveling
Educational	To learn a new skill
	To help me with a project/task
Informative	To get ready for the day

# Top viewing motivations/mindsets: relaxation, appointment viewing and escapist/break time

% Who View Online/Streaming Video Weekly+ in Each State

75%+

To relax at the end of the day, at free time	89%
I have planned to watch alone	76%
To take a break during the day	75%

50-74%

I stumble-upon or get pulled into watching	68%
I have planned to watch with others	63%
To spontaneously view/share with others	60%
To get ready for the day	58%
To catch up on popular, viral videos	57%

40-49%

To learn a new skill	46%
To help me with a project/task	46%
To pass time while traveling	43%

A woman with long, wavy blonde hair is shown in profile, looking down at a smartphone she is holding in her hands. The scene is dimly lit, with a dark, blurred background that suggests an outdoor setting at dusk or night. The lighting highlights her hair and the screen of the phone.

**Who's viewing what  
and why?**

# Viewing motivations/mindsets are identified by video viewing need state

Motivations/Mindset		Top State
Relaxation	To relax at the end of the day/free time	Relaxed (50%)
Appointment	I have planned to watch alone	Entertained (38%); Relaxed (38%)
	I have planned to watch with others	Entertained (42%)
Spontaneous	I stumble-upon/get pulled into watching	Entertained (39%)
	To spontaneously view/share with others	Entertained (41%)
	To catch up on popular/viral videos	Entertained (35%)
Escapist	To take a break during the day	Relaxed (40%)
	To pass time while traveling	Entertained (42%)
Educational	To learn a new skill	Informed (43%)
	To help me with a project/task	Informed (45%)
Informational	To get ready for the day	Informed (35%)

# Viewing motivations fall into buckets that align with specific video types

Motivations/Mindset		Top Types Viewed
Relaxation	To relax at the end of the day/free time	TV Shows (42%)
Appointment	I have planned to watch alone	Movies (38%)
	I have planned to watch with others	Movies (46%)
Spontaneous	I stumble-upon/get pulled into watching	UGC Video Clips (46%)
	To spontaneously view/share with others	UGC Video Clips (39%)
	To catch up on popular/viral videos	UGC Video Clips (39%)
Escapist	To take a break during the day	UGC Video Clips (36%)
	To pass time while traveling	UGC Video Clips (32%)
Educational	To learn a new skill	Instructional Videos (46%)
	To help me with a project/task	Instructional Videos (47%)
Informational	To get ready for the day	News/Weather (46%)

# Viewing motivations fall into buckets that align with certain devices

Motivations/Mindset		Top Devices Used
Relaxation	To relax at the end of the day/free time	Connected TV (51%)
Appointment	I have planned to watch alone	Connected TV (51%)
	I have planned to watch with others	Connected TV (63%)
Spontaneous	I stumble-upon/get pulled into watching	Smartphone (52%)
	To spontaneously view/share with others	Smartphone (53%)
	To catch up on popular/viral videos	Smartphone (52%)
Escapist	To take a break during the day	Smartphone (49%)
	To pass time while traveling	Smartphone (61%)
Educational	To learn a new skill	Computer (50%)
	To help me with a project/task	Computer (52%)
Informational	To get ready for the day	Smartphone (45%)

# Summary: viewing motivations fall into buckets that align with specific video types, devices and emotions

Motivations/Mindset		Top Formats Viewed	Top Devices Used	Top State
<b>Relaxation</b>	To relax at the end of the day/free time	<b>TV Shows (42%)</b>	<b>Connected TV (51%)</b>	<b>Relaxed (50%)</b>
<b>Appointment</b>	I have planned to watch alone	<b>Movies (38%)</b>	<b>Connected TV (51%)</b>	<b>Relaxed, Entertained (38%) (tie)</b>
	I have planned to watch with others	<b>Movies (46%)</b>	<b>Connected TV (63%)</b>	<b>Entertained (42%)</b>
<b>Spontaneous</b>	I stumble-upon/get pulled into watching	<b>UGC Video Clips (46%)</b>	<b>Smartphone (52%)</b>	<b>Entertained (39%)</b>
	To spontaneously view/share with others	<b>UGC Video Clips (39%)</b>	<b>Smartphone (53%)</b>	<b>Entertained (41%)</b>
	To catch up on popular/viral videos	<b>UGC Video Clips (39%)</b>	<b>Smartphone (52%)</b>	<b>Entertained (35%)</b>
<b>Escapist</b>	To take a break during the day	<b>UGC Video Clips (36%)</b>	<b>Smartphone (49%)</b>	<b>Relaxed (40%)</b>
	To pass time while traveling	<b>UGC Video Clips (32%)</b>	<b>Smartphone (61%)</b>	<b>Entertained (42%)</b>
<b>Educational</b>	To learn a new skill	<b>Instructional Videos (46%)</b>	<b>Computer (50%)</b>	<b>Informed (43%)</b>
	To help me with a project/task	<b>Instructional Videos (47%)</b>	<b>Computer (52%)</b>	<b>Informed (45%)</b>
<b>Informational</b>	To get ready for the day	<b>News/Weather (46%)</b>	<b>Smartphone (45%)</b>	<b>Informed (35%)</b>

Q3. What types of video are you watching in each of those scenarios?

Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?

Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.

Base: Weekly Online Video Viewers who view in each scenario



# Younger audiences skew higher in watching video when experiencing particular motivations or in a particular mindset

Weekly Viewers' Age by Motivator/Mindset

	Total	Relaxation	Spontaneous		Escapist		Appointment		Educational		Informative	
		To relax	I stumble-upon	To spontaneously view with others	To catch up on popular videos	To take a break	To pass time/traveling	I have planned to watch others	I have planned to watch alone	To help me with a project	To learn a skill	To get ready
13-17	9%	128	138	149	158	134	170	132	129	167	139	129
18-34	29%	134	149	156	157	143	172	158	144	166	170	147
35-54	36%	98	90	91	88	95	83	92	94	83	86	96
55+	25%	54	45	30	31	45	17	34	48	24	26	42

# Males are more likely to watch video to pass the time while traveling or to help them with a particular project

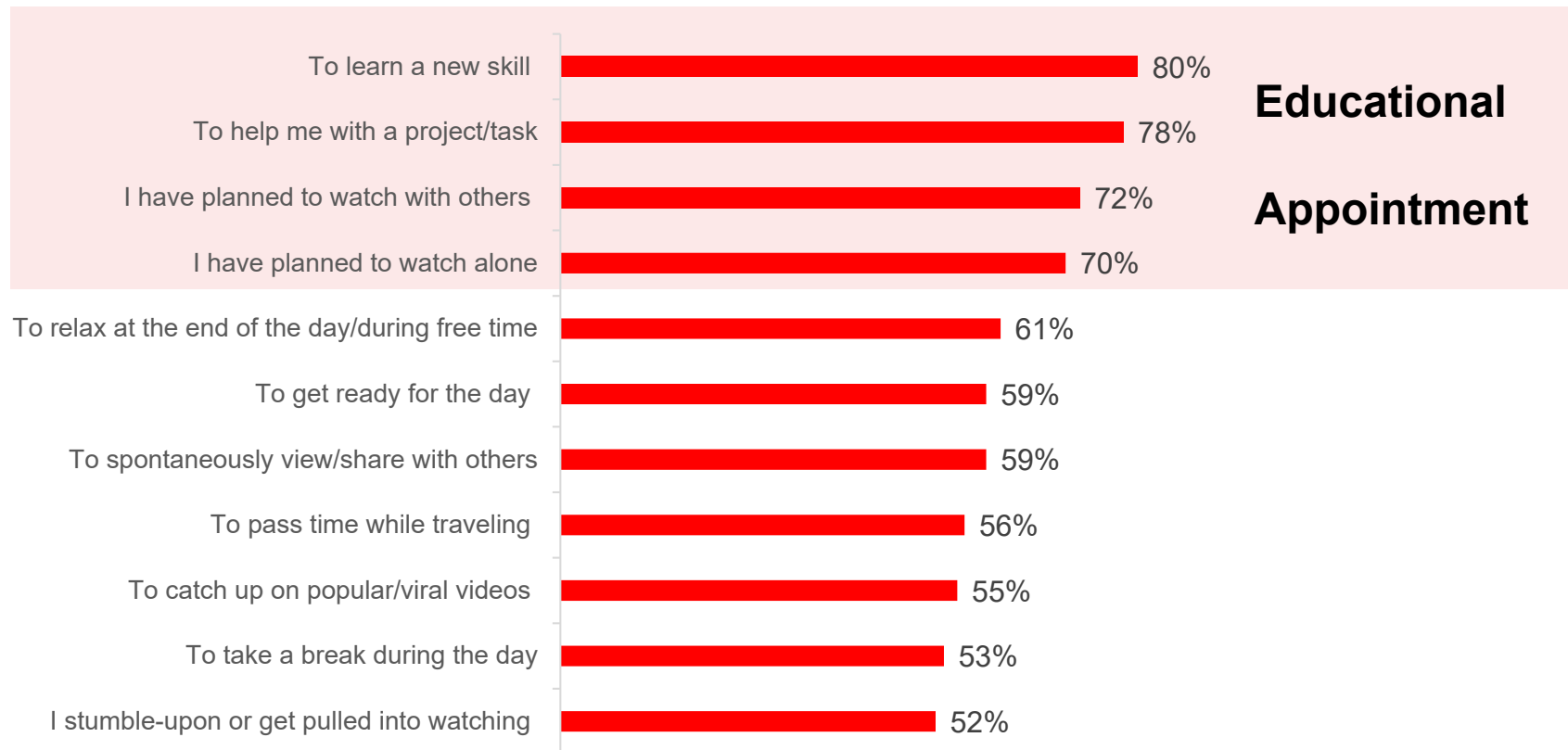
Weekly Viewers' Gender by Motivation/Mindset


	Total	Relaxation	Spontaneous		Escapist		Appointment		Educational		Informative	
		To relax	I stumble-upon	To spontaneously view with others	To catch up on popular videos	To take a break	To pass time while traveling	I have planned to watch others	I have planned to watch alone	To help me with a project	To learn a skill	To get ready
Male	49%	<b>103</b>	<b>107</b>	<b>113</b>	<b>118</b>	<b>107</b>	<b>122</b>	<b>113</b>	<b>108</b>	<b>122</b>	<b>119</b>	<b>119</b>
Female	51%	97	93	88	83	94	79	88	92	79	82	82

Motivations that skew most heavily male

# Educational and Appointment viewing gets the most content attention

Pay attention to content in the following viewing motivations (Top 2 Box)



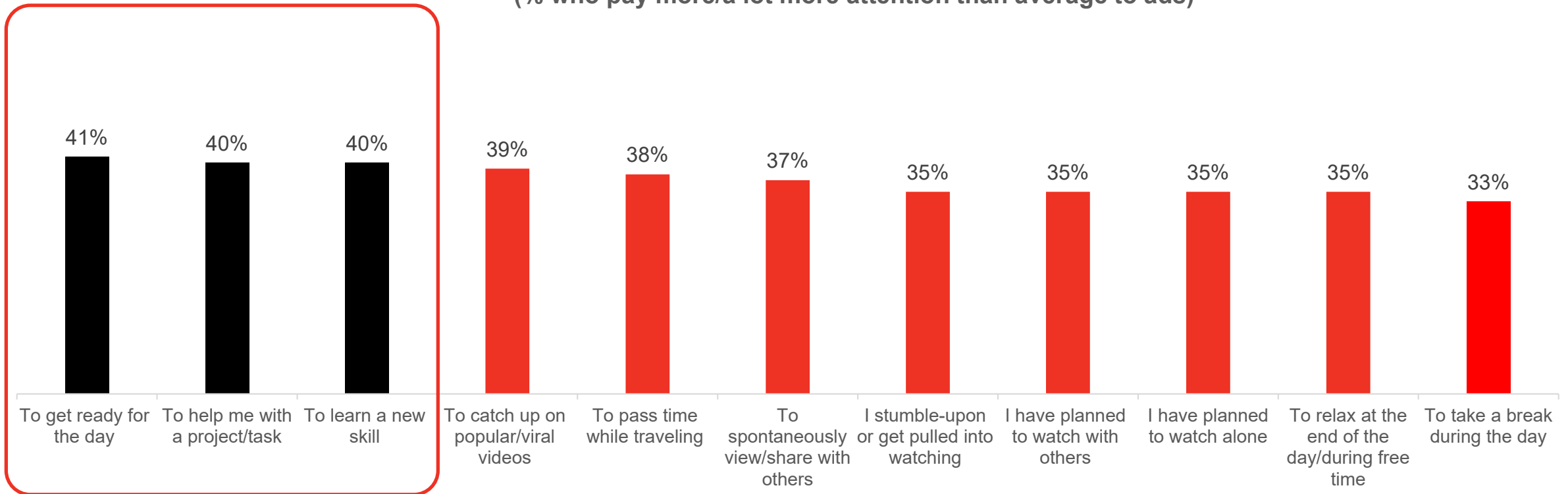
A woman with long, wavy blonde hair is shown in profile, looking down at a smartphone she is holding in her hands. The scene is dimly lit, suggesting dusk or dawn, with a dark, hazy background of hills or mountains. The lighting highlights her hair and the screen of the phone.

**Viewing advertising:**  
**When are they paying attention?**

# Consumers pay more attention to ads depending upon the motivation/mindset

When preparing for the day or when learning, consumers are highly attentive to ads

Pay above average attention to ads in the following Motivations/Mindsets (Top 2 Box)  
(% who pay more/a lot more attention than average to ads)



# Viewers significantly more attentive to both content and ads when watching Educational videos

		Top Feelings	Above Average	
			Content	Ads
Relaxation	To relax at the end of the day/free time	Relaxed (50%)	61%	35%
	I have planned to watch alone	Relaxed, Entertained (38%) (tie)	70%	35%
Appointment	I have planned to watch with others	Entertained (42%)	72%	35%
	I stumble-upon/get pulled into watching	Entertained (39%)	52%	35%
Spontaneous	To spontaneously view/share with others	Entertained (41%)	59%	37%
	To catch up on popular/viral videos	Entertained (35%)	55%	39%
	To take a break during the day	Relaxed (40%)	53%	33%
Escapist	To pass time while traveling	Entertained (42%)	56%	38%
	To learn a new skill	Informed (43%)	80%	40%
Educational	To help me with a project/task	Informed (45%)	78%	40%
	To get ready for the day	Informed (35%)	59%	41%
Informational				

Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.

Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios? (more/a lot more attention)

Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios? (more/a lot more attention)

Base: Weekly Online Video Viewers who view in each scenario

# We also see increased ad attention for particular mindsets when content attention is in 'background' mode

		Top Feelings	Above Average	
			Attention Paid To: Content	Ads
Relaxation	To relax at the end of the day/free time	Relaxed (50%)	61%	35%
	I have planned to watch alone	Relaxed, Entertained (38%) (tie)	70%	35%
Appointment	I have planned to watch with others	Entertained (42%)	72%	35%
	I stumble-upon/get pulled into watching	Entertained (39%)	52%	35%
	To spontaneously view/share with others	Entertained (41%)	59%	37%
	To catch up on popular/viral videos	Entertained (35%)	55%	39%
Spontaneous	To take a break during the day	Relaxed (40%)	53%	33%
	To pass time while traveling	Entertained (42%)	56%	38%
Escapist	To learn a new skill	Informed (43%)	80%	40%
	To help me with a project/task	Informed (45%)	78%	40%
Educational	To get ready for the day	Informed (35%)	59%	41%
Informational				

Q3. What types of video are you watching in each of those scenarios? Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

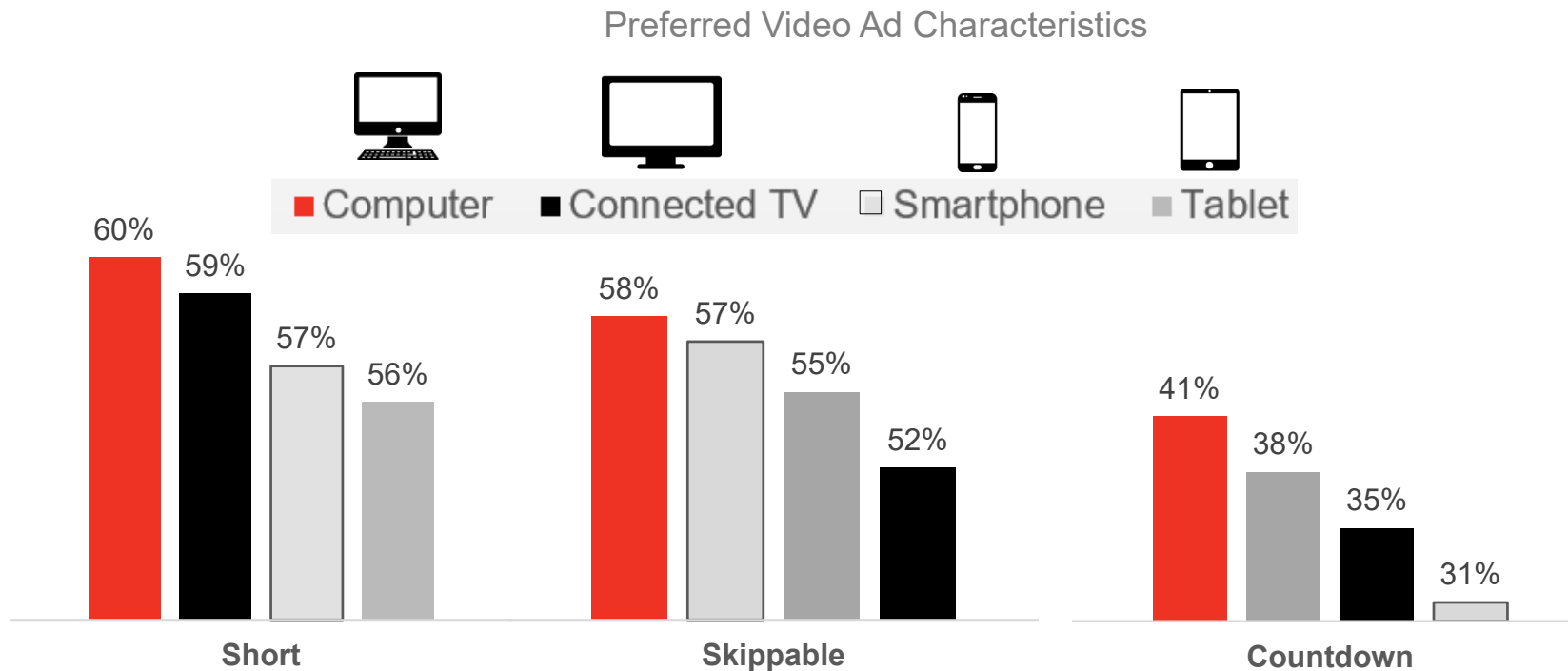
A woman with long, wavy blonde hair is shown in profile, looking down at a tablet device she is holding with both hands. The scene is dimly lit, with a soft light source from the left illuminating her hair and the device. The background is dark and out of focus, suggesting an outdoor setting at dusk or dawn. The word "Devices" is written in a clean, white, sans-serif font to the right of the woman.

# Devices



# Viewers prefer short video ads, especially when viewing on a computer or connected TV

- Computer users prefer short, skippable and countdown ads more than other device users
- Smartphone users have equal preference for short or skippable ads
- Skippable ads are preferred more by smartphone users than by connected TV users
- Countdown ads are preferred more by computer and tablet users than by connected TV or smartphone viewers



Q9A. When you watch streaming or online videos on a connected TV, are you okay with seeing video ads when the video ads: Base: Use a connected TV to watch online video, n=858

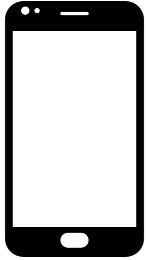
Q9B. When you watch streaming or online videos on a computer, are you okay with seeing video ads when the video ads: Base: Use computer to watch online video, n=789

Q9C. When you watch streaming or online videos on a tablet, are you okay with seeing video ads when the video ads: Base: Use tablet to watch online video, n=569

Q9D. When you watch streaming or online videos on a smartphone, are you okay with seeing video ads when the video ads: Base: Use a smartphone to watch online video, n=821

# Smartphones are the reality for advertisers; and for younger viewers, smartphones are the preferred viewing device regardless of mindset

Smartphone is the top device used in the following viewing Motivations/Mindsets:



	Among All (13+)	Among 13-17s	Among 55+
<b>Informational:</b>	To get ready for the day	To get ready for the day	
<b>Spontaneous:</b>	I stumble-upon or get pulled into watching To spontaneously view/share with others To catch up on popular/viral videos	I stumble-upon or get pulled into watching To spontaneously view/share with others To catch up on popular/viral videos	
<b>Escapist:</b>	To take a break during the day To pass time while traveling	To take a break during the day To pass time while traveling	To pass time while traveling
<b>Other Mindsets:</b>		To relax at the end of the day/during free time I have planned to watch alone To learn a new skill	

# Connected TV is the top device for Relaxation and Appointment viewing; also used more by 55+ for video viewing

Connected TV is the top device used in the following viewing Motivations/Mindsets:



	Among All (13+)	Among 13-17	Among 18-34	Among 35-54	Among 55+
<b>Relaxation:</b> To relax at the end of the day/free time			To relax at the end of the day/free time	To relax at the end of the day/free time	To relax at the end of the day/free time
<b>Appointment:</b> I have planned to watch alone I have planned to watch with others	I have planned to watch with others	I have planned to watch alone I have planned to watch with others	I have planned to watch alone I have planned to watch with others	I have planned to watch alone I have planned to watch with others	I have planned to watch alone I have planned to watch with others
<b>Other Mindsets:</b>					To get ready for the day To take a break during the day

# Computers are the top device for Educational viewing

Computer is the top device used in the following viewing Motivations/Mindsets:



	Among All (13+)	Among 13-17	Among 18-34	Among 35-54	Among 55+
<b>Spontaneous:</b>				I stumble-upon or get pulled into watching	I stumble-upon or get pulled into watching To catch up on popular/viral videos To spontaneously view/share with others
<b>Educational:</b>	To learn a new skill To help me with a project/task	To help me with a project/task	To help me with a project/task	To learn a new skill To help me with a project/task	To learn a new skill To help me with a project/task

A woman with long, wavy blonde hair is shown in profile, looking down at a smartphone she is holding in her hands. The scene is dimly lit, suggesting dusk or dawn, with a dark, silhouetted background of hills or mountains. The lighting highlights her hair and the screen of the phone.

# Ad Relevance and Ad Receptivity

**Most Weekly Online Video Viewers**

**78%**

**accept the value exchange of  
ads for free video content**



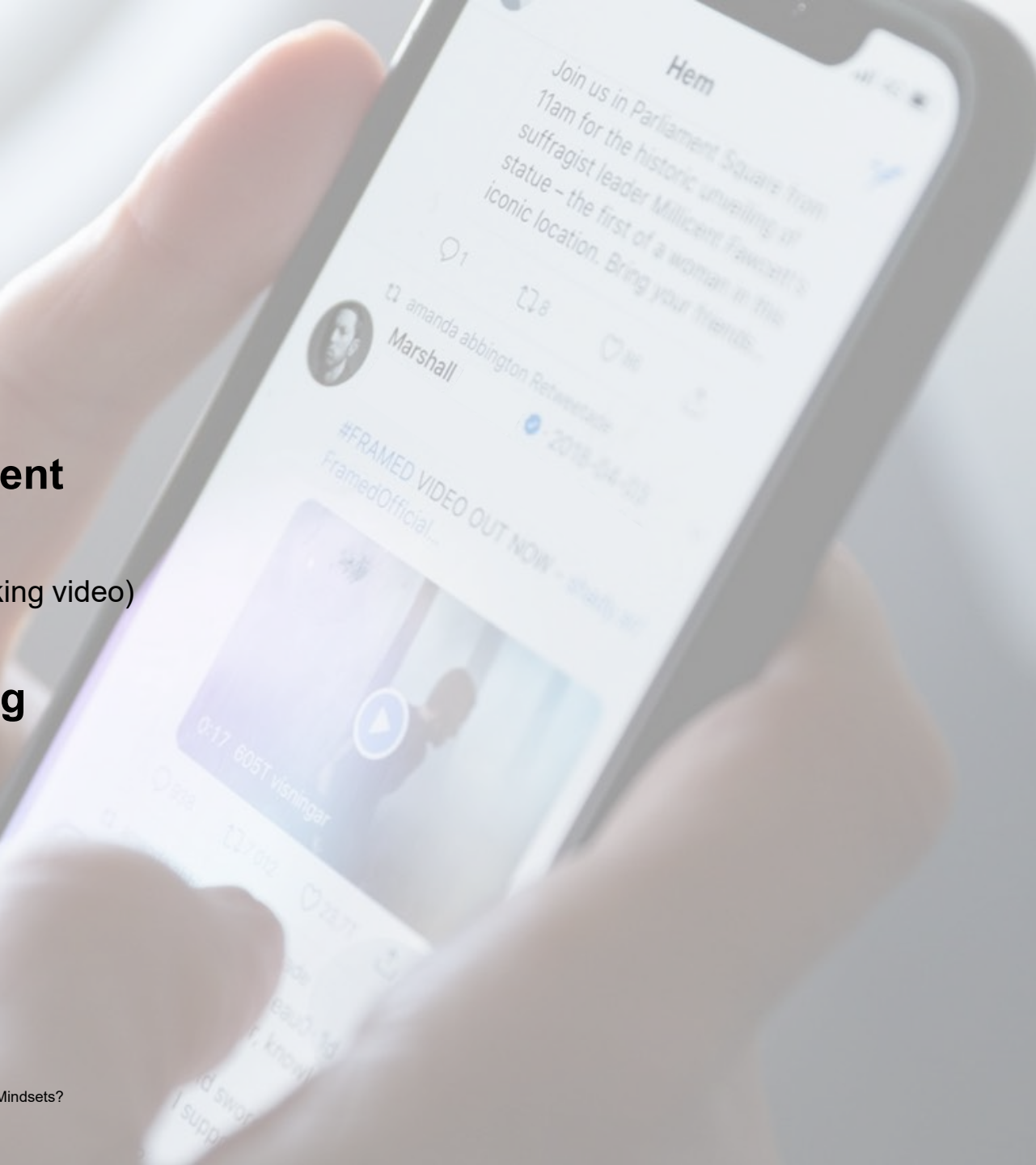
**Contextual relevance is key**

**56%**

**prefer video ads related to the content  
they're watching**

(e.g., an ad for a supermarket while they watch a cooking video)

**It's the top choice across all viewing  
motivations/mindset**

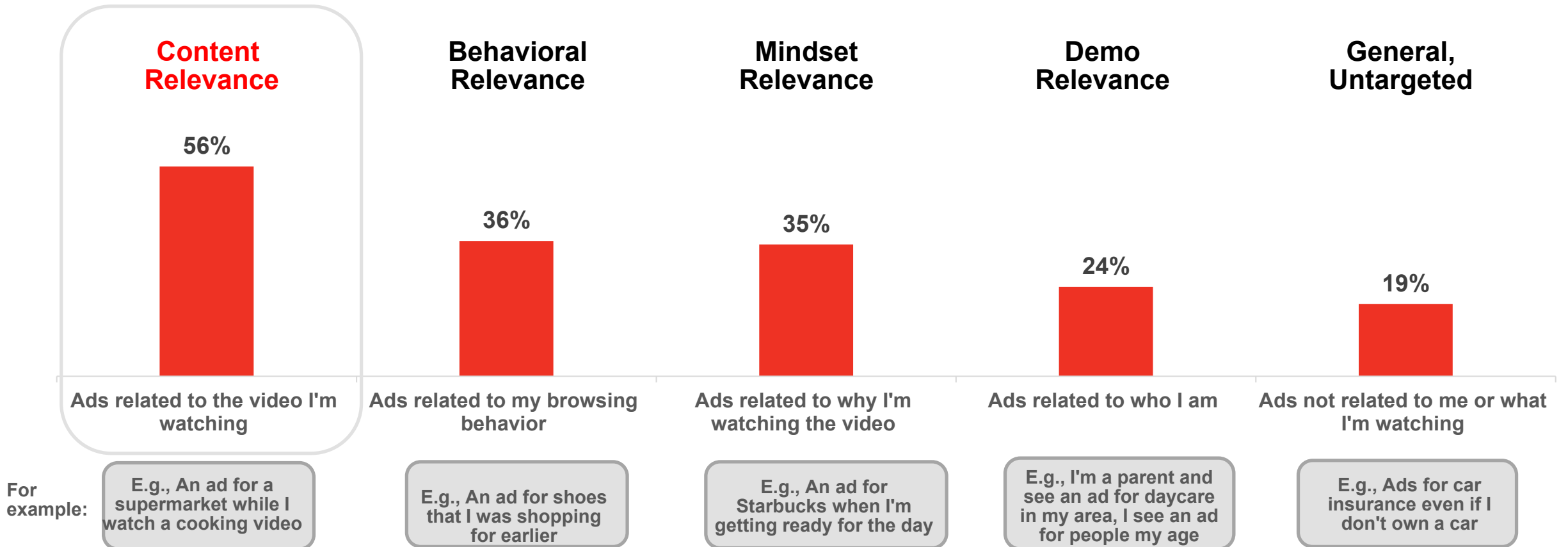


Q12. In general, which type of video ads do you prefer?  
Q13. Which type(s) of ads do you prefer when watching in each of the following Motivations/Mindsets?  
Base: Weekly Online Video Viewers, n=1,149

# Content-related ads are preferred over other types of relevance

(e.g., contextual ad for a supermarket while watching a cooking video)

% who prefer each type of advertising relevance





# Showing consumers content-related video ads increases their ad receptivity

There is a cause and effect between content-related ads and ad receptivity:

- 43% of consumers watching video to learn prefer video ads related to the content
- 37% of consumers watching video to learn say they're more open to ads when they see content-related video ads

Motivations/Mindset	% Who Prefer Ads Related to Videos They're Watching	% Who Report Being More Open to Such Ads
To learn a new skill	43%	37%
To help me with a project/task	42%	34%
To relax at the end of the day or during my free time	41%	34%
I have planned to watch alone	39%	33%
I have planned to watch with others	39%	29%
To spontaneously view/share with others	38%	34%
To take a break during the day	38%	32%
To catch up on popular/viral videos	38%	37%
To get ready for the day	37%	37%
To pass time while traveling	37%	34%
I stumble-upon or get pulled into watching	36%	34%

Q13. Which type(s) of ads do you prefer when watching in each of the following scenarios? (prefer to see video ads related to the video they're watching)  
Base: Weekly Online Video Viewers who view in each scenario

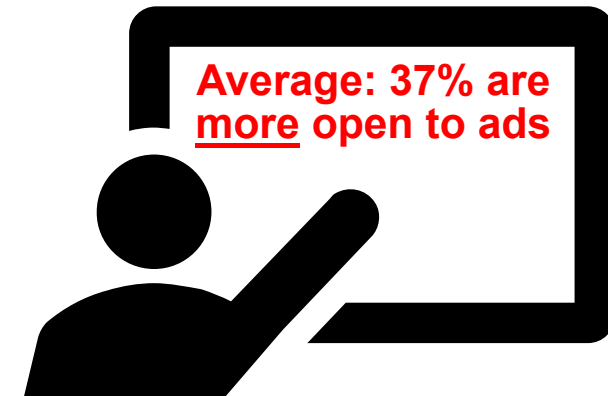
Q14. [Top 2 Box] When you actually see the type of ads you prefer in each of the following scenarios, does it affect how open you are to the ads? (% who answered that they are somewhat/much more open to ads of this type)  
Base: Weekly Online Video Viewers who view in each scenario and prefer to see content-relevant ads

# Video viewers report increased ad receptivity when shown ads of the relevance type they prefer

## Increase In Receptivity to Ads (when shown their preferred ad type)

### Viewing Motivations/Mindset

To learn a new skill	40%
To catch up on popular/viral videos	40%
To get ready for the day	40%
To pass time while traveling	40%
To help me with a project/task	39%
To spontaneously view/share with others	36%
To take a break during the day	35%
To relax at the end of the day or during my free time	35%
I have planned to watch with others	34%
I stumble-upon or get pulled into watching	34%
I have planned to watch alone	33%



## Average Increase in Ad Receptivity

# 37%

of Weekly Online Video Viewers  
say they're more open to video ads when  
they are shown the type of relevant ads they prefer

Q14. [Top 2 Box] When you actually see the type of ads you prefer in each of the following scenarios, does it affect how open you are to the ads? (% who answered that they are somewhat/much more open to ads of this type)

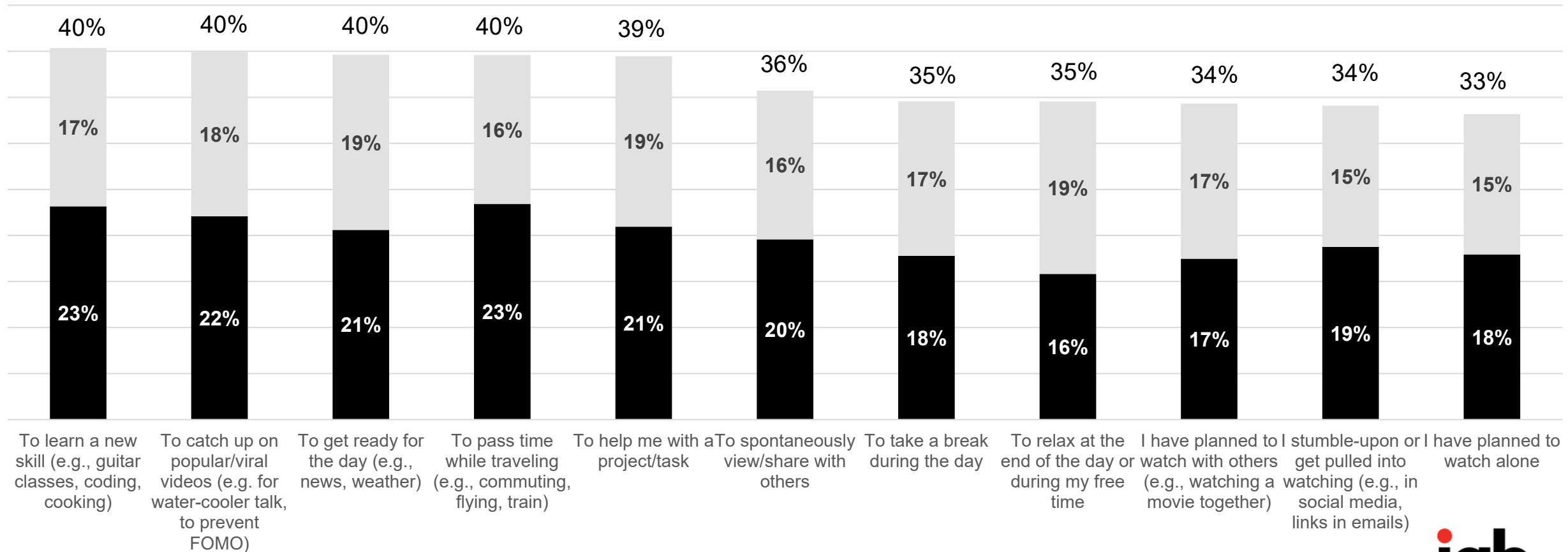
Base: Weekly Online Video Viewers who view in each scenario. Average across all scenarios.

# Showing consumers video ads of their preferred relevance has a positive impact on ad receptivity

## Impact of Ad Relevance on Ad Receptivity

(% of Weekly Video Viewers who say they are more/much more open to ads when shown their preferred relevance type)

■ More open to ads      ■ Much more open to ads



# Slight differences in ad relevance preferences emerge among viewing mindsets

## Preferred Ad Relevance Type

(% who prefer each type of advertising relevance)

↑ Stronger than avg. preference

No preference


↓ Weaker than avg. preference

		Contextual Relevance	Mindset/Motivation Relevance	Behavioral Relevance	Demo Relevance	General, Untargeted
<b>Relaxation</b>	To relax at the end of the day or during my free time	105		107		
<b>Appointment</b>	I have planned to watch alone			104		
	I have planned to watch with others					
<b>Escapist</b>	To take a break during the day					104
	To pass time while traveling		89	104		105
<b>Educational</b>	To learn a new skill	111	107			
	To help me with a project/task	108	112		85	
<b>Spontaneous</b>	I stumble-upon or get pulled into watching			109	108	
	To spontaneously view/share with others				89	108
	To catch up on popular/viral videos					
<b>Informative</b>	To get ready for the day		116			


# Other ad relevance types also have impact in different viewing mindsets

## Preferred Ad Relevance Type

(% who prefer each type of advertising relevance)

 Stronger than avg. preference

No preference

Weaker than avg. preference 

Ad Relevance	
<b>Ad Relevance Types:</b>	<ul style="list-style-type: none"> <li>Overall, consumers say they prefer Content relevant video ads. But in some mindsets, they're more open than usual to other types of ad relevance</li> </ul>
<b>Content Relevance</b>	<ul style="list-style-type: none"> <li>Contextually relevant ads (related to the video content) are most preferred during Educational videos and when Relaxing</li> </ul>
<b>Mindset Relevance</b>	<ul style="list-style-type: none"> <li>Mindset related ads (like ads about learning unrelated skills when you're watching a guitar instruction video) are more likely to be preferred in watching Informative and Educational videos</li> </ul>
<b>Behavioral Relevance</b>	<ul style="list-style-type: none"> <li>Behavioral ads (for items for which you previously shopped) are preferred when in Relaxing, Escapist, or Spontaneous viewing mode</li> </ul>
<b>Demo Relevance</b>	<ul style="list-style-type: none"> <li>Demo relevance (e.g. ads targeting your age group) is preferred when Stumbling Upon videos</li> </ul>
<b>General, Untargeted</b>	<ul style="list-style-type: none"> <li>When watching video for Escapist reasons—or when Spontaneously viewing—consumer are also open to receiving untargeted ads</li> </ul>

A woman with long, wavy blonde hair is shown in profile, looking down at a tablet device she is holding. The scene is dimly lit, suggesting dusk or dawn, with a dark, silhouetted background of hills or mountains. The lighting highlights her hair and the edges of her face.

# Video Mindset /Motivations Fact sheets

# Relaxation Viewing

*To relax at the end of the day/during free time is the top weekly+ viewing scenario*

- When Relaxing, the top video viewing mindset, consumers typically view TV Shows on a Connected TV in a relaxed state and 35% of viewers pay more than average attention to the ads.

	Top 3 Formats Viewed	Top Device Used	Top 3 Motivations/Mindsets	% Who Pay Above Average Attention to:	
				Content	Ads
<b>To relax at the end of the day/during free time</b>	TV Shows (42%) Subscription Originals (36%) Movies (36%)	Connected TV (51%)	Relaxed (50%) Entertained (38%) Content (26%)	61%	35%

Index shown below is for the pre/post  
 Q3. What types of video are you watching in each of those scenarios?  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario



# Appointment Viewing

Highest attention to content

- When Appointment Viewing, consumers typically view long content on a Connected TV when in a relaxed/entertained state—and 35% of viewers then pay more than average attention to the ads

	Top 3 Formats Viewed	Top Device Used	Top 3 Motivations/Mindsets	% Who Pay Above Average Attention to:	
				Content	Ads
<b>I have planned to watch alone</b>	Movies (38%) TV Shows (37%) Subscription Originals (36%)	Connected TV (51%)	Relaxed (38%) (tie) Entertained (38%) (tie) Satisfied (25%)	70%	35%
<b>I have planned to watch with others</b>	Movies (46%) Subscription Originals (40%) TV Shows (36%)	Connected TV (63%)	Entertained (42%) Happy (32%) Relaxed (32%)	72%	35%

Q3. What types of video are you watching in each of those scenarios?  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

# Spontaneous Viewing



- When Spontaneously Viewing, consumers typically view UGC on a Smartphone in an entertained state and 35%-39% of viewers pay more than average attention to the ads

	Top 3 Formats Viewed	Top Device Used	Top 3 Motivations/Mindsets	% Who Pay Above Average Attention to:	
				Content	Ads
<b>I stumble-upon or get pulled into watching</b>	UGC Video Clips (46%) Music Videos (20%) Live Stream Videos (19%)	Smartphone (52%)	Entertained (39%) Relaxed (21%) Satisfied (19%)	52%	35%
<b>To spontaneously view/share with others</b>	UGC Video Clips (39%) TV Shows (21%) Movies (21%)	Smartphone (53%)	Entertained (41%) Happy (26%) Satisfied (21%)	59%	37%
<b>To catch up on popular/viral videos</b>	UGC Video Clips (39%) TV Shows (22%) Original Dig Videos (20%)	Smartphone (52%)	Entertained (35%) Updated (23%) Informed (23%)	55%	↑ 39%

Note: Results also show that the youngest consumers studied, ages 13-17, pay higher attention to content vs 55+

Q3. What types of video are you watching in each of those scenarios  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

↑ Significantly higher than average

# Escapist Viewing

Younger viewers drive travel scenario

- When Escapist Viewing, consumers typically view UGC on a Smartphone in a relaxed or entertained state and 33%-38% of viewers pay more than average attention to the ads.

	Top 3 Formats Viewed	Top Device Used	Top 3 Feelings	% Who Pay Above Average Attention to:	
				Content	Ads
<b>To take a break during the day</b>	UGC Video Clips (36%) TV Shows (29%) Subscription Originals (24%)	Smartphone (49%)	Relaxed (40%) Entertained (35%) Content (21%)	53%	33%
<b>To pass time while traveling</b>	UGC Video Clips (32%) TV Shows (30%) Movies (29%)	Smartphone (61%)	Entertained (42%) Relaxed (31%) Satisfied (23%)	56%	38%

Q3. What types of video are you watching in each of those scenarios?  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

# Educational Viewing

Higher attention to content and ads

- When motivated/in a mindset for Education, consumers typically view Instructional videos on a Computer; 40% of viewers pay more than average attention to the ads at this time—higher than when in most viewing states

	Top 3 Formats Viewed	Top Device Used	Top 3 Feelings	% Who Pay Above Average Attention to:	
				Content	Ads
<b>To learn a new skill</b>	Instructional Videos (46%) Educational Videos (31%) UGC Video Clips (24%)	Computer (50%)	Informed (43%) Motivated (33%) Empowered (26%)	80%	↑ 40%
<b>To help me with a project/task</b>	Instructional Videos (47%) Educational Videos (30%) UGC Video Clips (18%)	Computer (52%)	Informed (45%) Motivated (30%) Empowered (25%)	78%	↑ 40%

Q3. What types of video are you watching in each of those scenarios?  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

↑ Significantly higher than average

# Informative Viewing

Mindset with highest attention to ads

- Consumers typically view News/Weather on a Smartphone; 41% of pay more than average attention to the ads—the highest ad attention mindset correlated to content/device

	Top 3 Formats Viewed	Top Device Used	Top 3 Feelings	% Who Pay Above Average Attention to:	
				Content	Ads
To get ready for the day	News/Weather (46%) UGC Video Clips (15%) TV Shows (14%)	Smartphone (45%)	Informed (35%) Updated (25%) Motivated (19%)	59%	↑ 41%

Q3. What types of video are you watching in each of those scenarios?  
 Q5. During each of the following scenarios, what device(s) do you typically use to watch streaming or online video?  
 Q6. Tell us how you feel when you are watching streaming or online video in each of those scenarios.  
 Q7. [Top 2 Box] How much attention do you pay to the streaming or online videos in each of the following scenarios?  
 Q11. [Top 2 Box] How much attention do you give the ads when you see them in each of the following scenarios?  
 Base: Weekly Online Video Viewers who view in each scenario

↑ Significantly higher than average

# Leveraging the Data: Overall

- **Contextual works:** the majority of weekly online video viewers prefer you to deliver video ads related to the content they're watching
  - They are also more open to other types of targeting when in specific viewing mindsets
  - **Maintain engaged viewing:** Those who are appointment viewing (planned watching) are over indexed for attention paid to content. They are engaged. To keep their attention, consider interactive, rewarded/value exchange ads
  - **Employ Behavioral ads for solo viewing:** Behavioral targeted ads are preferred by those who have "planned to watch alone"
  - **Use Connected TV for down-time:** The two motivation/mindset states that rise to the top for Connected TV Viewers are relaxation and appointment viewing
- 41% say they pay more or much more attention to ads when getting ready for the day
  - 40% say they pay more or much more attention to ads during viewing of content that helps them with a project or task
  - 40% say they pay more or much more attention to ads during viewing of content that helps them learn a new skill

# Leveraging the Data: Mobile

## Key motivations/mindsets for Mobile:

**Informative:** getting ready for the day ranks highest for stated ad attention

- Identify opportunities to connect with this audience especially in the context of “start of the day” news and weather

**Spontaneous:** “fomo” (fear of missing out) effect – e.g.: catching up on viral videos

- Consider sequential ads to message to consumers who are consuming recommended clips one after another

**Escapist viewing:** occurs as a way to (a) pass the time when traveling (b) take a break during the day

- Consider aligning your ad with UGC (user generated content)

## Additional Targeting and Creative Implications:

- Create and deliver shorter form ads
- Consider vertical video for native in-app experiences

For Professional Video content environments (not user generated):

- Consider ads that are informative in nature (e.g., product learning) as the consumer is already in that mindset, and receptive to informational educational messaging

# Leveraging the Findings: CTV

## Connected TV Viewer motivation/mindset states:

- Relaxed / entertained (watching movies and TV shows)
- Shared viewing with others

## Targeting and creative implications:

- Consider more entertaining storylines, shared viewing context can help reinforce brand relevance messaging for group activities (upcoming movies, tune in promotions)
- Since shared viewing occurs on the big screen across all age groups, typically in appointment viewing mindsets, with no strong ad relevance preference, consider ads for relevance types that work for any demo



# Leveraging the Findings: Desktop

## Desktop Viewer motivation/mindset states:

- **Educational:** ranks highest on desktop overall for all age demos
- These educational viewers over-index in terms of paying attention to content and ads
  - Consider ads that support learning (new skill etc.) as they are already in that mindset
- **Spontaneous viewing:** Adults 35+ over index on spontaneous viewing on desktop
  - Consider sequential ads that message to consumers who are consuming recommended clips one after another

## Additional creative implications:

- Desktop viewing (unlike mobile) still occurs primarily in horizontal format

# Appendix

# Online video is being watched in many “viewing states”

## On average, Weekly Online Video Viewers...

watch in **3+ states** each **day**

watch in **7+ states** each **week**

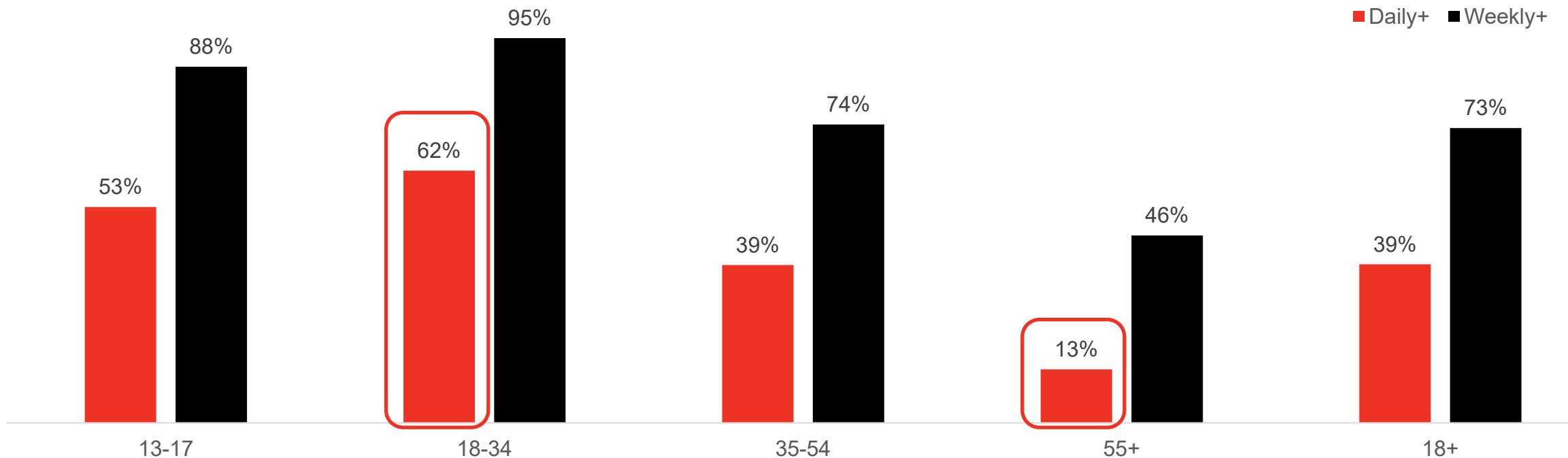
- To get ready for the day
- I stumble-upon or get pulled into watching
- To spontaneously view/share with others
- To catch up on popular/viral videos
- To learn a new skill
- To help me with a project/task
- To take a break during the day
- To pass time while traveling
- I have planned to watch alone
- I have planned to watch with others
- To relax at the end of the day/during free time

Q2. How often do you watch streaming or online video in the following scenarios? Base: Weekly Online Video Viewers, n=1,149

# Younger viewers watch online video much more frequently

Nearly 5x as many 18-34s watch daily or more vs. 55+

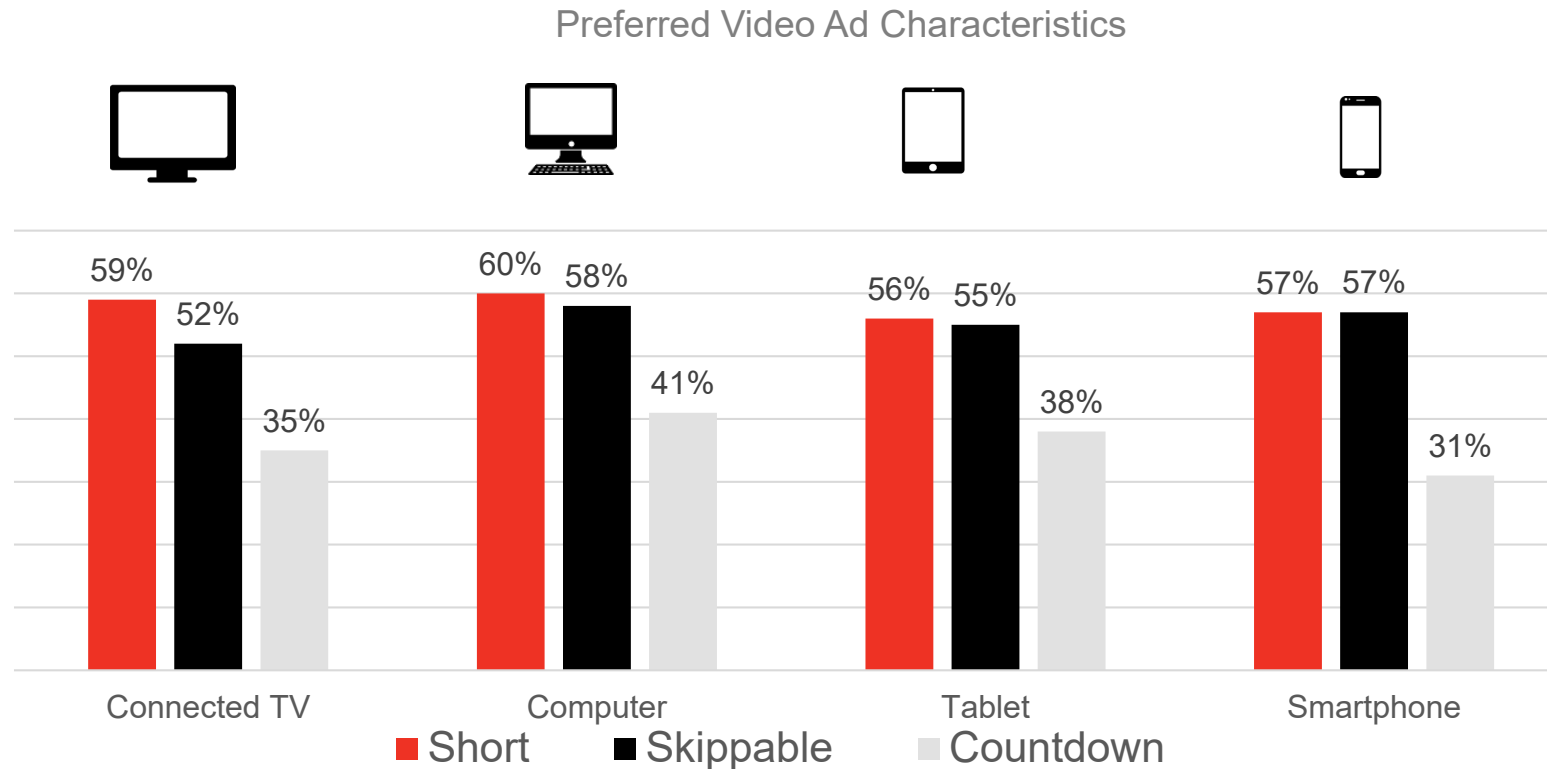
Frequency of Online Video Viewership



Q0. Do you watch streaming or online video?  
Q1. How often do you typically watch streaming or online video?  
Base: Total, n=1,544

# Short ads increase acceptance on any device

- Smartphone users have equal preference for short or skippable ads
- Skippable not as important for connected TV viewers
- Countdown ads are most preferred by computer users



Q9A. When you watch streaming or online videos on a connected TV, are you okay with seeing video ads when the video ads: Base: Use a connected TV to watch online video, n=858

Q9B. When you watch streaming or online videos on a computer, are you okay with seeing video ads when the video ads: Base: Use computer to watch online video, n=789

Q9C. When you watch streaming or online videos on a tablet, are you okay with seeing video ads when the video ads: Base: Use tablet to watch online video, n=569

Q9D. When you watch streaming or online videos on a smartphone, are you okay with seeing video ads when the video ads: Base: Use a smartphone to watch online video, n=821

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Maru/Matchbox has been pushing the boundaries of the customer market insights space for over a decade. We are a sector-focused consumer intelligence firm delivering better client outcomes. Our expert teams are deeply invested in key sectors of the economy, delivering insights and analysis backed by superior quality data.

# Thank You

**Sue Hogan**

**[Sue.Hogan@IAB.com](mailto:Sue.Hogan@IAB.com)**

**Rhiannon Shane**

**[Rhiannon.Shane@Maru.com](mailto:Rhiannon.Shane@Maru.com)**