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Interview with Marvin Vogt, eye square and Sebastian Westphal, JOM

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Moving Image Trends

# "TV Can Serve as a Universal Weapon and Establish Brands Particularly Effectively"

What developments, platforms, and technologies will shape the moving image landscape in 2025? How can data-driven approaches and programmatic TV help brands reach their target audiences even more precisely? And how do advertising contacts truly impact people? We discussed these topics with Marvin Vogt, Senior Research Consultant at eye square, and Sebastian Westphal, Director Media Consulting at JOM, both speakers at the JOM Impulse event on February 27 under the theme *"Moving Image 2025 - Trends, Impact, Technologies."*

**markenartikel: How do you currently evaluate TV as an advertising medium in terms of reach and audience coverage?**

**Sebastian Westphal:** TV reach is declining among younger audiences, a trend that has been ongoing for years. Nevertheless, the channel remains relevant for brands. Overall, compared to the previous year, usage time has only slightly decreased. Daily reach still stands at nearly 60%.



**Marvin Vogt:** That's correct. TV remains the most important advertising environment—by a significant margin over online advertising. Moreover, marketing strategies are no longer solely about precisely targeting a narrowly defined audience but rather about bringing the brand into the general consciousness with a broader approach. At its core, this aligns with the concept of *mental availability* as described by Byron Sharp, Jenni Romaniuk, and others.

## markenartikel: How does that work?

**Vogt:** TV can serve as a universal weapon, effectively establishing brands. And the notion that an excessive focus on online segments may not be optimal—or even harmful—to business can be seen in the now-legendary example of Nike.

## markenartikel: Which trends and technologies in video advertising should brands watch for in 2025?

**Vogt:** In terms of content and environments, the trend toward short-form content raises the question of whether this also means a trend toward short ads. From a market and media research perspective, the increasing differentiation of various platforms is also noteworthy: the style and execution of moving images function differently on each platform today. Failing to hit the right tone results in wasted impact. In media planning and technical delivery, the enhanced integration of Smart TVs through Addressable and Programmatic TV is definitely a trend to watch.

**Westphal:** Speaking of Programmatic TV: The fusion of linear structures with digital booking and targeting capabilities will be a key trend in 2025. Additionally, connected Smart TVs in households continue to grow, and streaming numbers are increasing—meaning Connected TV will remain a critical touchpoint for brands in 2025.

## markenartikel: What specific opportunities do you see in Programmatic TV?

**Westphal:** Programmatic TV combines the benefits of linear television with those of the digital world—offering simple booking and targeting capabilities. Currently, compared to traditional TV planning, the available options remain limited. For example, focusing on specific environments is not yet possible, nor is customizing a mix of individual channels and time slots. A contact is still just a contact. However, we know that a prime-time contact has a completely different impact than one during daytime programming. Programmatic TV will continue to evolve and already enables cross-device incremental and contact sequencing logic. In my view, it is only a matter of time before Programmatic TV offers even more impactful opportunities.



**Vogt:** Addressable and Programmatic TV are undoubtedly two exciting innovations because they promise to combine the best of both worlds: the premium advertising environment of linear TV with the precise targeting capabilities of the digital realm. Initial studies indicate positive effects. However, this promise does not automatically mean that brands can advertise more effectively.

## markenartikel: Why not?

**Vogt:** Firstly, new technologies almost never enter households suddenly but rather gradually, meaning their integration into a media mix takes time. Secondly, it remains to be seen how accurately socio-demographic variables in this method align with reality. Thirdly, every trend has a counter-trend, which in this context includes stricter user privacy preferences, disabled cookies, geo-tagging restrictions, or even ad blockers on Smart TVs. For now, it should not be seen as a replacement for linear TV but rather as an interesting supplementary option—especially for more localized campaigns.

## markenartikel: Which platforms are essential for a moving image strategy in 2025—and why?

**Westphal:** That depends entirely on the target audience and cannot be answered universally. The key is to identify possible synergies and incremental effects between touchpoints. In terms of impact, advertising on the big screen is particularly relevant and should be part of every moving image strategy.

**Vogt:** If you're investing in moving images, you really can't avoid traditional television—for reach, broad appeal, and not to mention, the overall strong advertising effectiveness. Once that foundation is set, additional platforms can be incorporated: BVOD and streaming services cover slightly different usage behaviors and refine audience targeting through varied content offerings. Online platforms like YouTube and social media also play a role in media planning—to further refine reach, accommodate mobile usage, and enhance omnipresence. However, one must consider that advertising acceptance and effectiveness on these platforms are often lower. When viewed briefly in a social media feed, without sound, and on a mobile device, a brand cannot tell as compelling a story. Depending on the brand and industry, cinema ads or the new possibilities of DOOH (Digital Out-of-Home) can also be viable options to reach people holistically through moving images. After all, it's called a *mix* for a reason.



## markenartikel: What improvements should TV and moving image providers make to create more attractive advertising environments, particularly regarding content?

**Vogt:** Advertising environments should focus even more on high-quality content—think *brand safety*. We repeatedly observe a transfer or spillover effect onto advertising brands. TV already does this well. I like to call it the *gatekeeper effect*: If a brand appears on TV, the perception is often, "Wow, they made it onto television. Not just anyone gets in there." Platforms with user-generated content naturally face greater challenges in this regard. However, TV could learn from the increasing blend of ads and content seen in influencer marketing, brand partnerships, collaborations, and sponsorships.

## markenartikel: Where do you see potential for improvement in performance measurement?

**Vogt:** Performance measurement would benefit from a standardized framework across all environments, ensuring that only verified contacts—ideally validated by independent third parties—are counted and allowing for better cross-channel comparability.

**Westphal:** Measurement and a holistic approach are crucial. There are already positive developments toward unified measurement. Besides linear TV broadcasters, companies like Amazon and DAZN are collaborating with AGF, and discussions with Netflix are ongoing. This is a step in the right direction.

## markenartikel: A study by Screenforce and eye square analyzed what happens when content and advertising truly reach people. What insights on ad reception surprised you the most?

**Vogt:** The general effectiveness differences between platforms were not surprising—TV and BVOD advertising offer better contact quality and, consequently, higher advertising impact than YouTube or social media. However, what did surprise us was how strongly our latest study, *Into the Wild*, aligned with previous results despite its radically new research approach. Unlike traditional ethnographic studies, we did not predefine test groups, content, or ads—yet the findings mirrored previous outcomes exactly.



## markenartikel: What does that imply?

**Vogt:** It reinforces both the effectiveness differences between platforms and the overall validity of media usage research. And an average ad visibility of just 2.5 seconds on Instagram and TikTok becomes even more striking when derived from such a naturalistic scenario.

**Westphal:** The study's results confirm that in today's fast-paced media world, people occasionally need a break from short, stimulating impulses, making them more receptive to messages in this context. From an effectiveness standpoint, it underscores that *not all contacts are equal*. However, this does not mean brands should ignore platforms like TikTok—on the contrary. Some audiences can no longer be reached through traditional TV or big screens. Brands must adapt their messaging and creative approach accordingly.

## markenartikel: What are the implications for brands? What can they do to improve their advertising impact?

**Westphal:** That always depends on the target group. In principle, however, we have a better effect on the big screen and in a reclining position. So it should always be considered to include the big screen in the planning in order to maximise the effect - with the appropriate target groups.

## markentartikel: And what is your advice, Mr Vogt?

**Vogt:** Lower your expectations of online advertising. No, joking aside, it would be a good start to take into account the respective advertising impact when creating the media mix. Especially when we are talking about 2.5 seconds, this can only mean that advertisers, creative agencies and market research institutes have to work even more closely together: How can I make my ad stand out in the first few seconds, grab attention and generate interest so that people stay tuned, look longer and don't swipe away? The answer: trial and error, developing different routes, producing different versions and then testing them empirically. Unfortunately, there is no magic formula.



## About Marvin Vogt and Sebastian Westphal



**Marvin Vogt** works as a Senior Research Consultant in the Brand and Media Experience Unit of eye square. He holds a Master of Science in Marketing and Consumer Psychology with a focus on buying and consumer behavior from the University of Sussex, where he graduated with distinction.

Before joining eye square, he successfully established and developed a new medical technology brand in a pharmaceutical company. He also is a trained banker.

In addition to his work as a research consultant, he is a lecturer at Nuertingen Geislingen University, where he teaches empirical research methods. He also holds a lectureship in marketing at the Berlin School of Economics and Law.

As Director Media Consulting at JOM, **Sebastian Westphal** is responsible for advising clients across all locations with a focus on classic media planning. The qualified marketing communications specialist has been with the JOM Group in various roles since 2007 and demonstrates his extensive expertise on a daily basis.