YouGov BENlabs

US

Product Placement Plotted 2024

The Standard vs. Standout Formula

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Foreword from BENlabs

“

Product placement is experiencing incredible growth, with more and more brands investing in this marketing strategy.

This growth is partially being driven by ad-distraction and the rapid shift of viewership from linear channels to streaming platforms on which many audiences opt to avoid advertising altogether.

But another key factor driving the adoption of product placement is the ever-increasing volume of data demonstrating its effectiveness as a marketing channel. Research conducted by BENlabs in 2023 found that 75% of consumers have searched for a product after seeing it in content and that **63%** feel positive emotions after seeing a product placement in film or TV.

For many marketers, the discussion has shifted away from whether product placement should be part of their marketing mix to how they can do it best. YouGov’s study provides insight on a key aspect of this discussion: the value of large, scripted placements in breakout hits versus prominent placements across a variety of shows.

The knowledge provided in this study should be considered essential when building out a data-driven approach to product placement.”

Aaron Frank
Senior Vice President, Strategy, Research & Insights**, BENlabs**

What is product placement?

For decades, television and film have served as powerful cultural mirrors, capturing human experiences, reflecting our times, and shaping our worlds. Audiences around the world are naturally drawn to these art mediums and have only grown more engaged since the development of streaming services.

Product placement is a fascinating element born from the evolving relationship between content and advertising, allowing brands to integrate themselves into television and film. In 2021 YouGov **published research** defining the market for product placement – the deliberate and often paid-for inclusion of branding into a work of media. Since then, the product placement industry has only grown in significance and sophistication as advertisers continue to see the effect of brand placements on consumer recall, purchase intent, and loyalty.

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In light of product placement's development, one critical question takes center stage:

Is it better to land one standout, strategic placement or leverage a series of standard integrations when it comes to maximizing impact?

YouGov partnered with BENlabs, an entertainment AI company specializing in human behavior, content intelligence, and brand integrations, to understand the world of scale within product placement, exploring the advantages and considerations associated with both standout and standard approaches.

Using research collected and conducted in the United States in 2024 across a complementary set of YouGov products, we'll unpack conventional wisdom vs. what the data really tells us, analyze real-word examples, and offer insights into other key factors advertisers should be considering in addition to the question of scale.

The State of Product Placement

Product placement has traditionally been viewed as a tertiary form of brand marketing that supports broader marketing initiatives like 30-second ads, e-mail marketing, or out-of-house advertising. The latest research from YouGov on ad awareness shows that while product placement does see lower levels of awareness than other forms of advertising, the difference is not as significant as some may think.

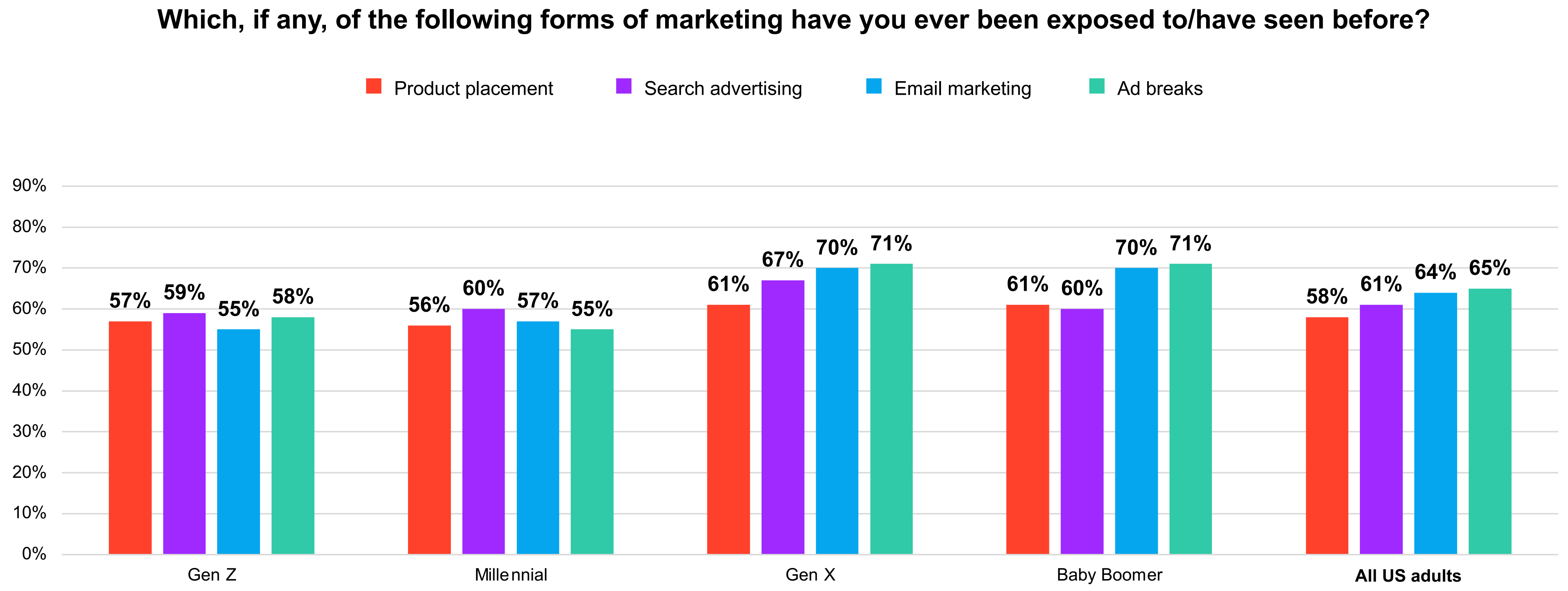
More than half **(58%)** of US respondents said that they had been exposed to/had seen product placement before, while traditional advertising such as ad breaks were most commonly seen at **65%.** The gap is even narrower when comparing awareness of search ads against that of product placements **(61% vs. 58%; a 3-point difference).**

Age tends to play a key role in awareness of different types of advertising. Gen Z and Millennials under-index on awareness for more traditional forms of advertising, while Gen X and Baby Boomers over-index on advertising of this kind.

Among the coveted Gen Z demographic, awareness of product placement **(57%)** is higher than both billboards **(56%)** and email marketing **(55%),** demonstrating why brands have moved strongly towards product placements in recent years when trying to reach even the most hardened, ad-averse demographics.

“More than half (58%) of respondents said that they had been exposed to/had seen product placement before”

The State of Product Placement



YouGov Surveys: Serviced, 01/24/2024 (n = 2,304)

While product placement

as a means of marketing is growing, the question of how best to execute placements is still debated.

One key axis of debate is whether brands should go for a **single standout moment** with their product placement, or a series of **standard moments.**

What makes a standout product placement different?

According to BENlabs, standout placements are those that transcend simple product visibility. They are defined by:

Scripted integration

The product becomes a narrative element, woven organically into the script. These placements are crafted moments that foster positive associations with a brand and elicit memorability through emotions.

Tentpole content

The placement occurs within a highly viewed piece of content, such as blockbuster film, popular TV show, or established franchise. This broadens the reach and potential impact of the brand exposure.

Standard placements, by contrast, may involve less narrative integration or occur within content with a smaller audience. This doesn't necessarily negate their value, but the impact may be more subtle or focused on brand recognition rather than deeper engagement.

Using Data to Drive Strategy

Audiences now prefer integration over interruption; when done right, product placement is a win for audiences, advertisers and content creators alike."

"For years, marketers have understood the power of integrating their products into television shows and films as an effective way to drive cultural relevance and brand preference. The challenge has always been knowing which shows or movies will deliver the best return on investment.

Employing audience and content insights leveraged from BENlabs AI and YouGov data, allows brands to accurately identify their target audience's shared interests, passions and viewership habits to construct a data-driven product placement strategy that is most likely to drive results."

Erin Schmidt
Chief Strategy Officer, BENlabs

43%

of respondents agree with the statement, "I prefer product placement over other forms of marketing."

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Meet the brands

For our research, **BENlabs** shared **forty-three moments** they placed in partnership with four brands, classifying each as either a standout or standard product placement according to the definitions outlined previously. This allowed us to group both standout and standard placements and conduct research into their potential efficacies.

The placements analyzed include those for the **popular snack brand Cheetos, a global tech brand, a leading automotive brand, and a prominent paint and coatings industry brand.** They all featured in shows on major streaming platforms, whose viewership is tracked by YouGov Stream.

Traditionally, standout product placements have been seen as the gold standard. This aligns with one of the goals of this type of advertising, that is, embedding brands within the cultural conversation. Standout placements often occur in highly influential content and benefit from greater visibility and perceived prestige (think Coca-Cola in Stranger Things).

However, the burgeoning product placement industry has driven a demand for data to quantify effectiveness. The growth in this space has also fostered a more diverse and creative landscape, with brands employing a range of standout, high-impact placements and more frequent, standard integrations in TV and film.

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How we formulated the research

To gain a holistic understanding of product placement effectiveness, our research employed a multifaceted approach utilizing several YouGov research methods:

- **YouGov PQS (Placement Quality Scoring):** This tool, which provides an industry standard Net Placement Value (NPV) for product placements, offers a quantitative assessment of efficacy, accounting for factors like prominence, narrative integration, and emotional context.
- **YouGov behavioral research:** We conducted custom surveys to delve deeper into how viewers of the BENlabs integrations reacted to product placements, including brand awareness, recall and sentiment towards the featured products, comparing the results for these viewers to those of a general US audience to benchmark the relevance of product placements in advertising today. This also included open-ended responses to catch a range of opinions and views.

Demographic insights were gleaned by analyzing survey samples through YouGov Profiles. Additionally, YouGov Signal, a social listening tool, was employed to contextualize the product placements within the surrounding content and audience online conversations. This marriage of quantitative, qualitative, and social data provides us with a balanced understanding of the impact of standout and standard product placement strategies.

Explore examples >

Talk to a researcher >

The influence of YouGov PQS in product placement

> The product placement industry has made big leaps forward over even just the past decade, but it's important that this growth is accompanied by more sophisticated measurement and benchmarking tools."

"With our quantitative research, we are showcasing for the first time how measurement tools like YouGov PQS can unlock new insights and learnings when applied at scale. Building on our expertise in valuation, this research breaks new ground by modeling competitive simulations as product placement portfolio allocations.

With support from BENlabs, this innovative approach empowers brands to craft tailored strategies that resonate with their target audiences, ultimately propelling them towards measurable marketing success."

Dominic Prince
Product Lead, YouGov

17 million

Average viewership of four product placements from a leading automotive brand measured. These product placements generated a Net Placement Value of $335,000 on average.

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Standard vs. Standout:

How do each perform?

So what did the data show? We found that standout placements indeed pack a punch.

On average, a standout placement generated a Net Placement Value **(NPV) of $412,400**, compared to **$299,803** for a standard one.

What's more, data from YouGov Signal reveals that standout placements reside in shows that average higher Indexed Search Volumes, Wikipedia Page Views, and viewership than standard product placements.

In a one-on-one comparison, this suggests a higher return on investment for standout product placements, in line with conventional wisdom.

But saying that one standout product placement is better than one standard one only establishes a baseline for our purposes.

Placement Type	Indexed Search Volume	Wikipedia Page Views	Views	Net Placement Value (NPV)
Standard	55,963	19,202	14,708,572	$299,803
Standout	68,720	24,190	17,155,716	$412,400
Combined Avg.	**58,089**	**20,075**	**15,116,429**	**$318,569**

*Source: Source: YouGov Signal, YouGov Stream, YouGov PQS
Note: the figures displayed are the average values across the group of placements

To take this further, let's compare how many standard product placements are equivalent to a single standout placement…

Simulation A:

One standout product placement vs. multiple standard placements

We initiated our analysis by simulating 10,000 different scenarios. In each scenario, we compared the Net Placement Value (NPV) of a single randomly chosen standout placement against the NPV of two randomly chosen standard placements. As a reminder, Net Placement Value is YouGov's industry standard gauge of product placement ROI.

One standout placement outperformed two standard ones in over half of the simulations (50.5%). The results revealed a tipping point once we increased the number of standard placements to three. Against three standard placements, the standard ones collectively took the lead, delivering more value on 66.4% of occasions. This trend continued as you might expect – the more standard placements, the less likely a single standout one would outperform them.

By eight standard placements, they collectively generated more value than the single standout one 97% of the time.

So, purely in terms of valuation, it's better to have a single standout product placement compared to two standard ones, but this stops being true by three standard placements.

One standout vs two *standard*

50.5%

vs. 49.5%

Three *standard* vs one standout

66.4%

vs. 33.6%

Simulation B:

Two standout product placements vs. four standard placements

While at face value one might expect similar results to sampling one standout placement vs. two standard placements, we instead observed a significantly different outcome when comparing two standout placements vs. four standard ones.

Let’s recall that one standout moment beat out two standard ones by a slim majority. But four standard product placements jump to outperform the two standout ones **54.8%** of the time.

So… what is happening here?

Four *standard* vs two standout

54.8%

vs. 45.2%

Expert View

Dominic Prince
Product Lead, YouGov

"It's helpful to think of these product placements as an investment portfolio.

Imagine investing in a broad market index like the S&P500 versus picking individual stocks.

The index offers exposure to a variety of companies, reducing the risk of a single bad pick.

The chosen stock could outperform the market or underperform significantly. Diversifying a portfolio across multiple stocks mitigates this risk by averaging the returns of each individual investment.

So while diversification reduces the potential for exceptionally high returns (in other words, matching the market's best performers), it also provides a buffer against exceptionally low returns (matching the market's worst performers).

This is the force at play when examining the difference in simulating one standout product placement vs. two standard placements, and two standout placements vs. four standard ones."

Recall that while the average Net Placement Value (NPV) of a standout placement is $412,000 compared to $300,000 for a standard placement (a 1.38 ratio), our simulations showed a single standout placement outperforming two standard placements in over half of the scenarios. This might on face value seem confusing, when in theory two standard placements (worth a combined NPV of $600,000) should together be worth comfortably more than one standout one ($412,000).

However, this can be attributed to the wider range of NPVs observed for standard placements. With only two standard placements selected at random, the variance in their individual values can be high.

So, as the number of standard placements increases (as in the two standout vs. four standard simulation), their standard NPV tends to converge towards the overall standard of $300,000, aligning more closely with the theoretical 1:1.38 ratio and resulting in a higher likelihood of the standard placements collectively exceeding the value of the standout placement(s).

Talk to a researcher ›

Measuring brand awareness and consideration

To this point, our research has explored the effectiveness of different product placement strategies based on value.

But value is just one piece of the puzzle. To truly understand product placement effectiveness, we need to delve into how these placements impact consumer behavior.

We surveyed 2,526 viewers of four shows containing a product placement from each of BENlabs' four provided partners, along with a control group for each of the four shows. The four shows with product placements comprised of two standout placements and two standard placements.

To explore the effectiveness of standout vs. standard placements, we can focus on two separate case studies.

One will measure the impact of these placements on our global tech brand's awareness, and the other will look at the influence on Cheetos' purchase consideration.

2,526
Viewers surveyed

4
Shows

4 Product placements

4 Test groups
4 Control groups

One test group and one control group for each of the four shows

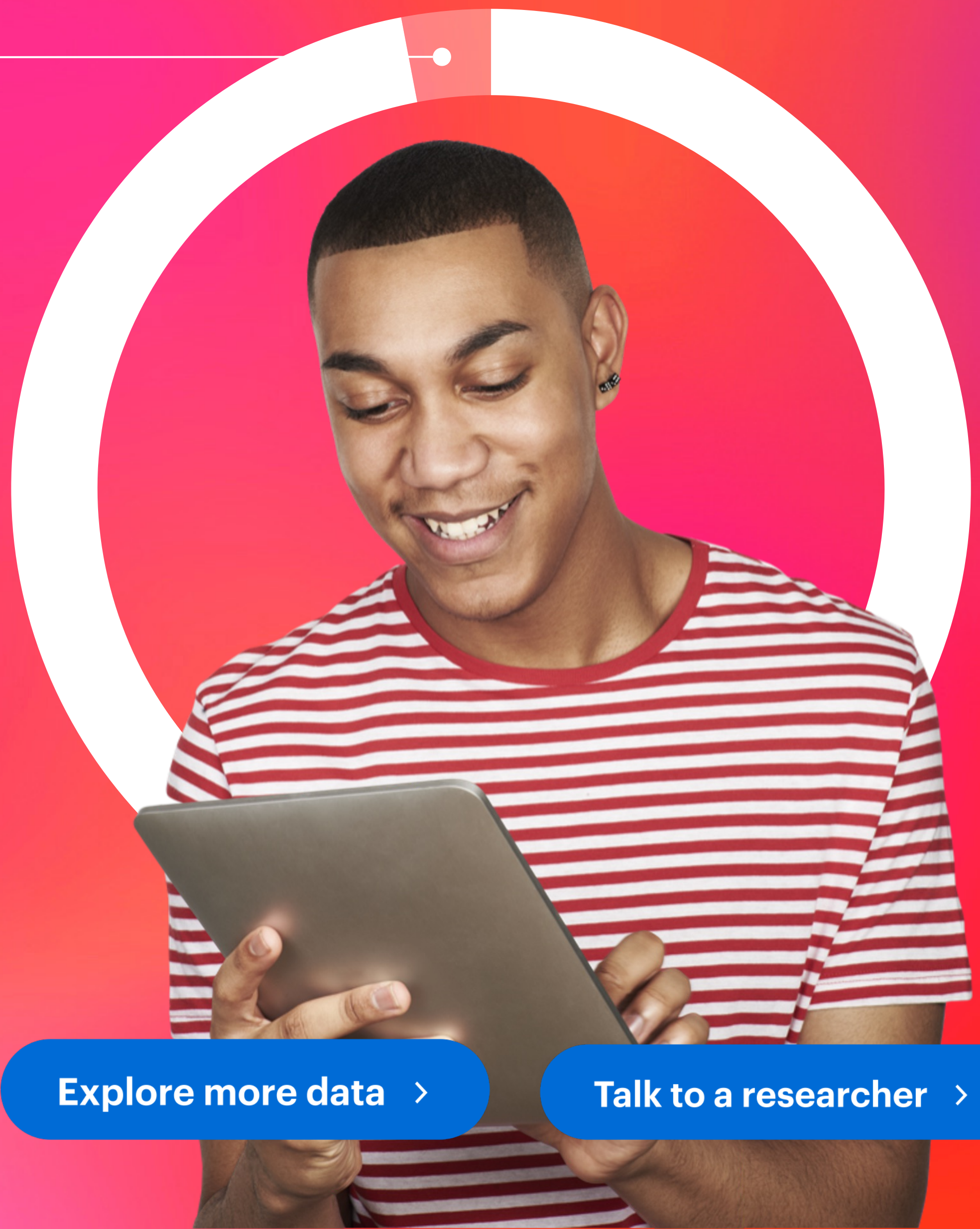
Measuring awareness with a global tech brand

Looking at our global tech brand, **97% of the test group were aware of the brand, while awareness sat around 96% for the control group**. The difference between the two groups was 0.42%.

97%

Awareness for global tech brand among test group

(vs. 96% for control group)



Why does this matter? The data shows that the control group were more likely to be aware of the brand's competitors than the test group (by 0.81%). This means that, in simple terms...

Those who saw the product placement in the test group were more likely to be aware of our brand, despite generally being less aware of other brands in the technology sector.

Explore more data ›

Talk to a researcher ›

Measuring consideration with Cheetos

For purchase consideration, there was a positive difference between the test and control groups for all four brands. Taking Cheetos as an example,

72%

of those exposed to their product placement said they would consider purchasing Cheetos.

This figure was just 70% among the control group.

Again, this wasn't just because the test group were more likely to consider purchasing snacks in general.

In fact, the difference between the purchase consideration for competitor brands for the test and control groups was -0.41%, meaning the control group were more likely to consider purchasing from snack brands generally.

Explore more data ›

Talk to a researcher ›

Impact on brand awareness and consideration

For three of the four brands studied, viewers in the test group (those exposed to the product placements) were more likely to be aware of the brand they had been exposed to than those in the control groups.

And this wasn’t just because the test group was more aware of the sector in general than the control group – in all three positive cases, the levels of awareness of the brand in question in the test group vs. the control group outperformed the difference in awareness between the test and control groups for competitor brands.

It's important to note that these increases weren't statistically significant. **However, for well-established brands with high existing awareness in the marketplace, even substantial marketing efforts may only yield modest gains in brand awareness.**

Interestingly, the size of the product placement (standout vs. standard) didn't significantly impact brand awareness or purchase consideration. This aligns with our earlier finding that the value ratio between standout and standard placements was relatively close (1:1.38).

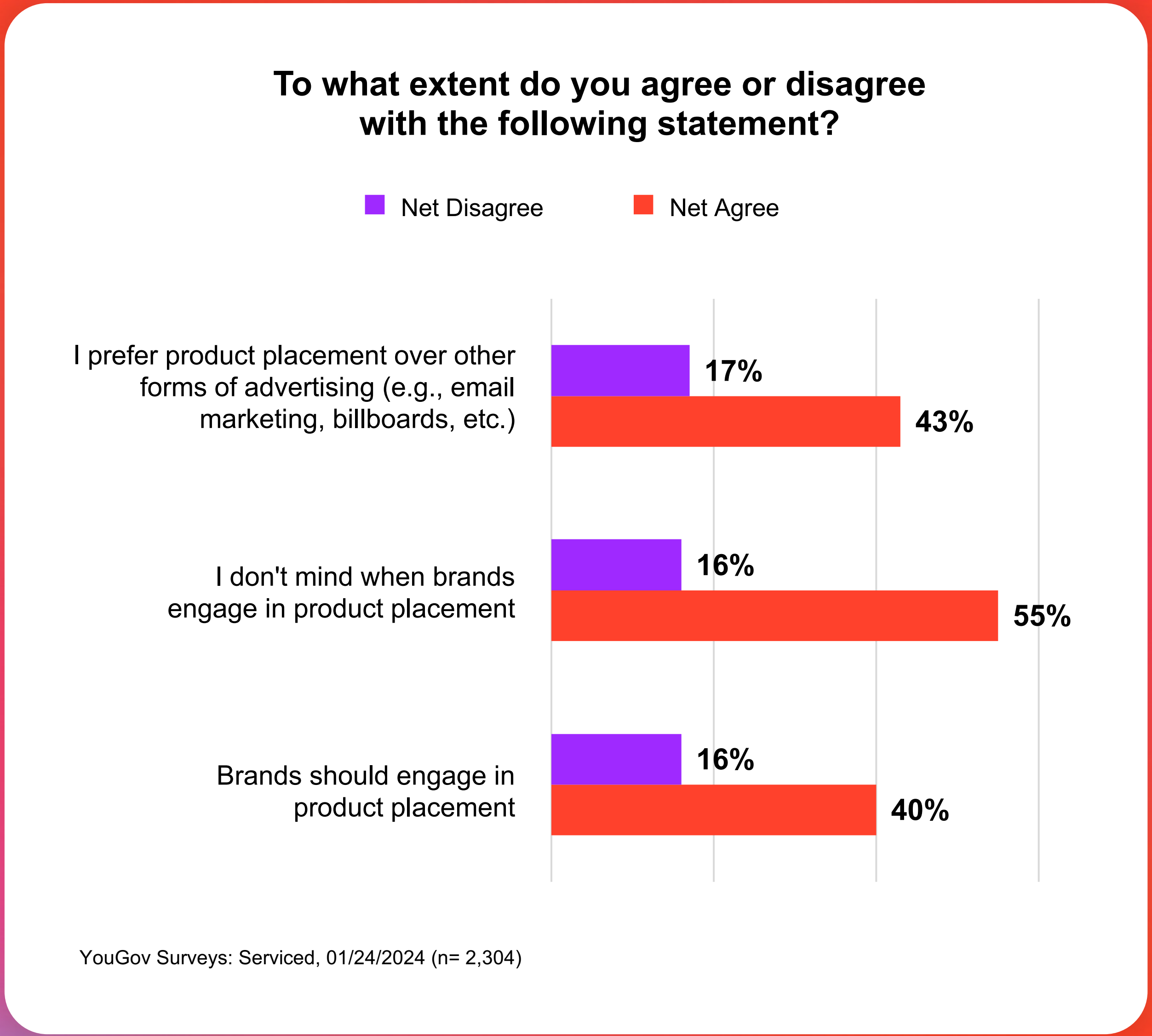
Beyond size, product placement as art

Our research has revealed that effective product placement goes far deeper than just the size or the valuation of the placement itself. To truly resonate with viewers, brands need to craft the right moment for the right audience.

We asked consumers in the US about their views on product placements. Notably, respondents were twice as likely to agree than disagree that brands should engage in produce placement (40% vs. 16%). In addition, two in five (43%) respondents agreed that they prefer the product placement experience over other forms of marketing.

While these findings suggest product placements can be effective, consumers, like with most advertising, expect them to be well-executed. This highlights the importance of creating moments that feel natural and avoid being intrusive.

Our open-ended survey responses offered valuable context into the "art" of executing a successful product placement. Viewers emphasized the importance of "doing it right." Product placement can even play a role in the beginning and end stages of the consumer journey: some viewers found discovering new products through placements intriguing, while others appreciated seeing familiar brands, reinforcing loyalty.



Audience understanding is crucial

Here's why understanding your target audience is crucial:

Establishing brand awareness:

By monitoring brand awareness before and after a product placement campaign, brands can gauge its effectiveness. This can help brands confirm any hunches, tailor approaches and refine future placements.

Building brand affinity:

Product placements can be a powerful tool for building brand affinity. When viewers see a brand they are familiar with seamlessly integrated into a show they enjoy, it can reinforce positive feelings and brand loyalty.

Sparking discovery:

Product placements can also introduce viewers to new products and brands. Done strategically, these placements can pique curiosity and encourage viewers to search them out.

Explore your audience ›

Conclusion

The success stories of product placements abound: placements in Netflix's *Stranger Things* or HBO's *The White Lotus* have demonstrably boosted recognition of the brands that participated in the shows.

Take Aperol, for instance, whose US sales grew by 50% in the US after popular characters in *The White Lotus* were viewed repeatedly seen sipping bright-orange Aperol Spritz cocktails in Sicily.

Moments like this one reinforce why marketers express a preference for standout product placements. However, through YouGov's research we have seen that there is no one-size-fits-all concept of 'better' for a given brand.

Our analysis indicates that while a single standout placement may outperform a single standard placement in terms of NPV, the landscape is more nuanced – as shown by our simulations. Neither standout nor standard placements are the decisive answer to any brand's product placement strategy.

Instead, brands must determine which approach aligns best with their overall marketing strategy, appetite for risk, and ability to surround a standout placement with other forms of marketing support. It is essential for each brand to build a data-driven strategy that reaches the right audience in the right ways, enabling them to capture the most upside possible from this increasingly popular form of marketing.

Continue on next page >

Conclusion

YouGov's audience data:

This data can provide valuable insights into viewers' existing brand awareness levels. Knowing where viewers stand on the brand familiarity spectrum allows you to tailor your placement strategy. For some brands, more frequent, subtle reminders might be most effective, while others might benefit from a more prominent placement with a clear call to action.

Partnering with experts:

Companies like BENlabs offer industry expertise that goes beyond raw data. They can help layer your audience insights with their understanding of how placements impact human behaviors. This combined knowledge can help you identify shows and scenes that not only reach your target audience but also provide the perfect context for your product placement.

By taking these factors into consideration, brands can move beyond a simplistic approach to product placement. They can craft strategic moments that resonate with viewers, build brand affinity, and ultimately drive results. It's the art of product placement meeting the science of audience understanding – **a combination that unlocks the true potential of product placements as a marketing strategy.**

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