MEDIA TRIALS

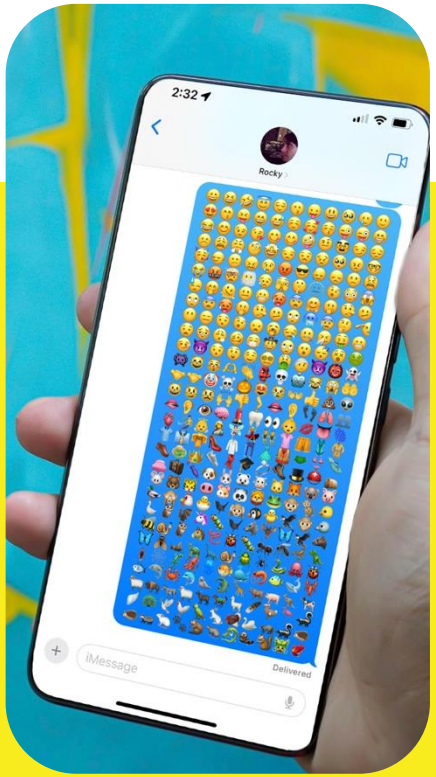
The Conversation Advantage

Winning with 1:1 Brand-Consumer Dialogue

Tech is rapidly changing how we communicate

People use all kinds of formats to standout online. Brands must embody how people talk online to stay part of real conversations

Formats people are using in conversations these days
% Selected “regularly” or “sometimes”



EMOJIS (96%)

STICKERS & GIFs (87%)

VOICE NOTES (83%)

MEMES (83%)

MEDIA TRIALS

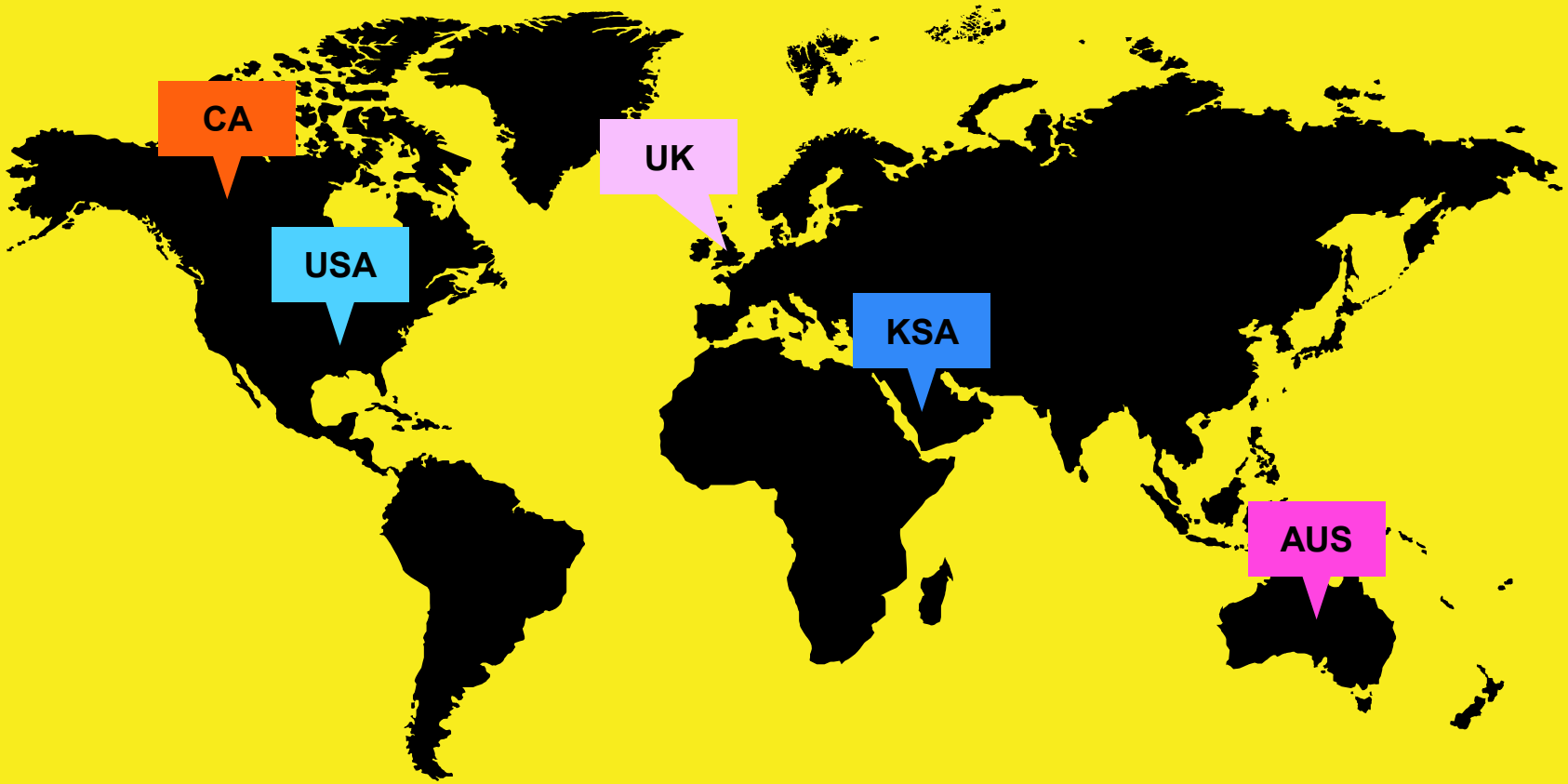
Source: The Conversation Advantage, Q4 2025
Social media users n= 7,860
Q: How often do you use the following [formats] when talking to people online? – Select one for each option

Our research

Goals:

1. Uncover what conversations mean today and how they are changing
2. Identify how brands can adapt and stay part of the conversation

Conducted in 5 markets:



How we did it

DIGITAL INTERVIEWS

What
Online surveys to understand how people communicate online today

Who
Nationally representative online panel of social media users

USA: Ages 13 – 44

Other markets: Ages 16 – 44

Total: n= 7,860

USA
n= 1,560

Australia
n= 1,587

United Kingdom
n= 1,590

Saudi Arabia
n= 1,537

Canada
n= 1,586

AD EFFECTIVENESS

What
Controlled testing using an experimental design survey to measure the impact of brand sponsored chats (also known as Sponsored Snaps on Snapchat)

Who
Nationally representative online panel of social media users

Ages 16 – 44

Total: n= 5,000

USA
n= 3,000

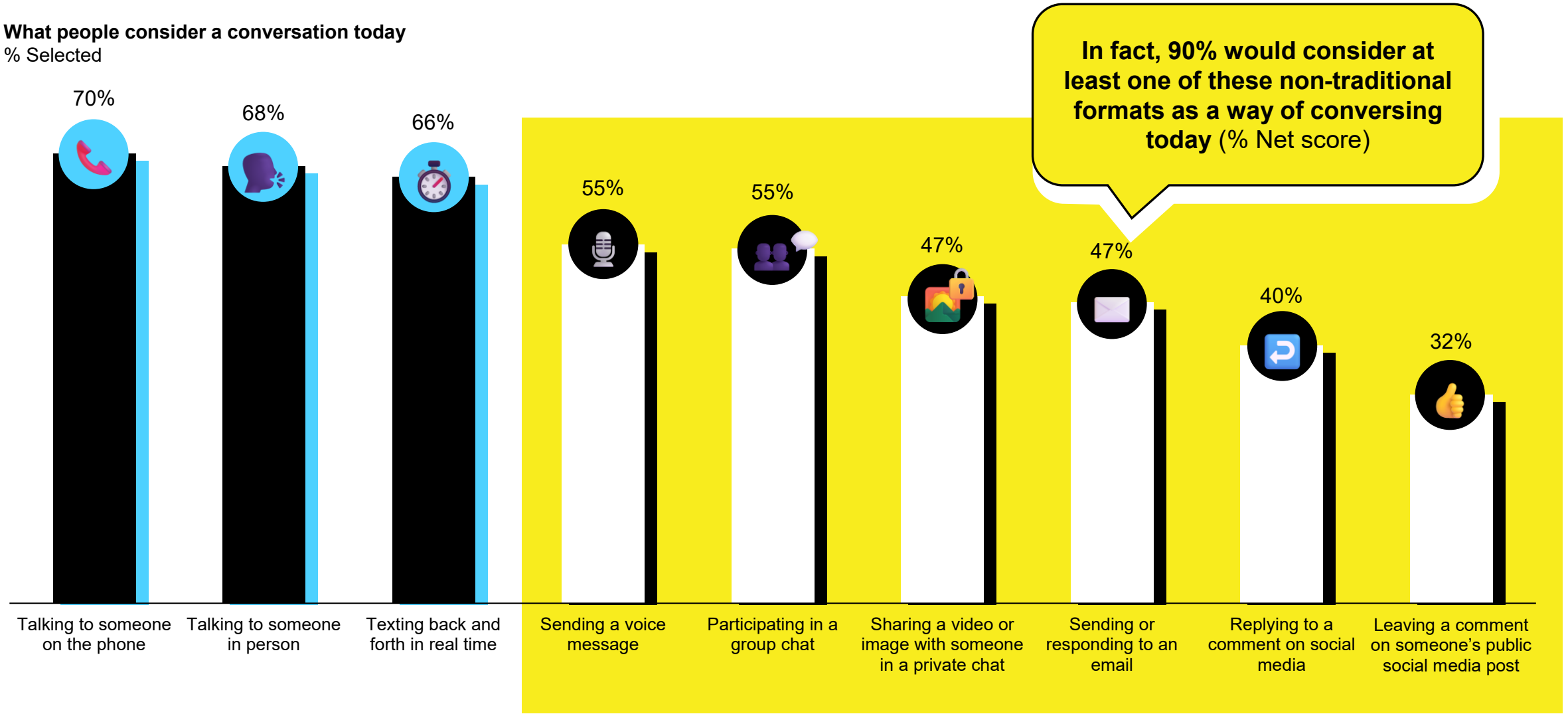
United Kingdom
n= 2,000

The new language of connection: what conversation means today

MEDIA TRIALS

Conversations now happen everywhere, not just calls and texts

What people consider a conversation today
% Selected



In fact, 90% would consider at least one of these non-traditional formats as a way of conversing today (% Net score)

MEDIA TRIALS

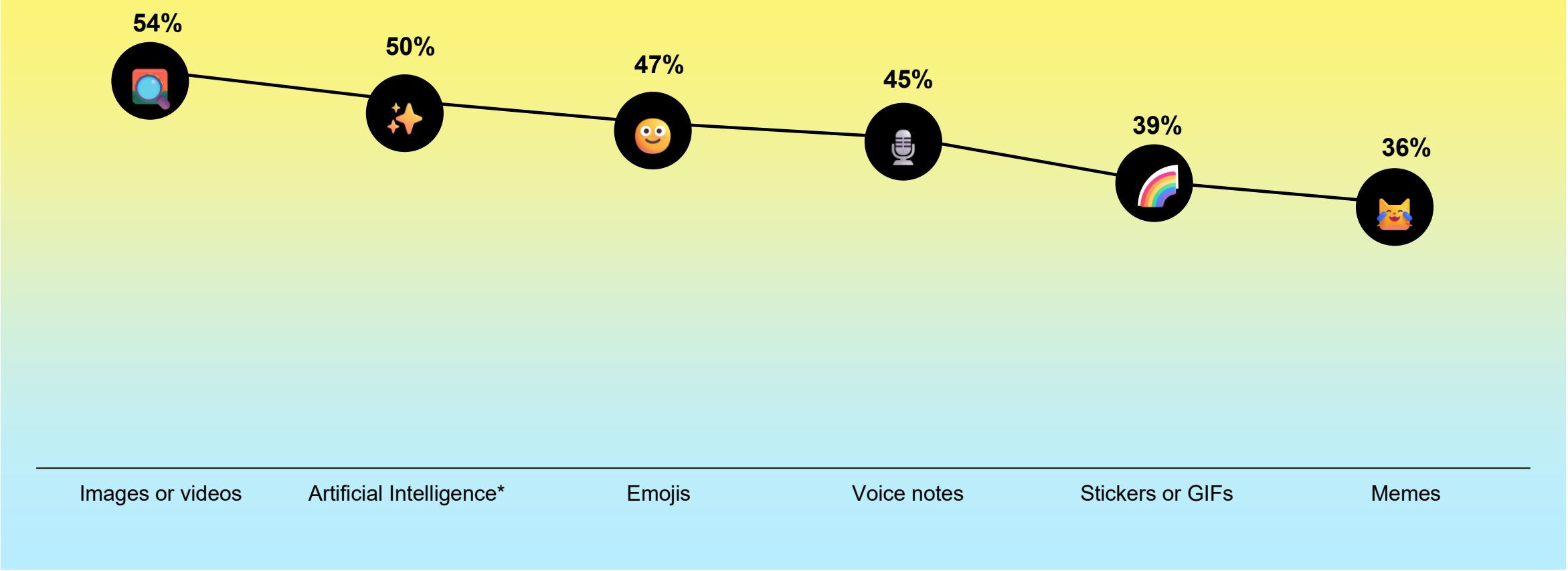
Digital Interviews
Social media users n= 7,860
Q: Which of the following do you consider a form of conversation, including starting a conversation? – Select all that apply

Visuals are becoming the language of digital expression

Ads and content should mirror how people talk. Lean into play (images, videos, emojis, stickers, memes) to join the conversation naturally

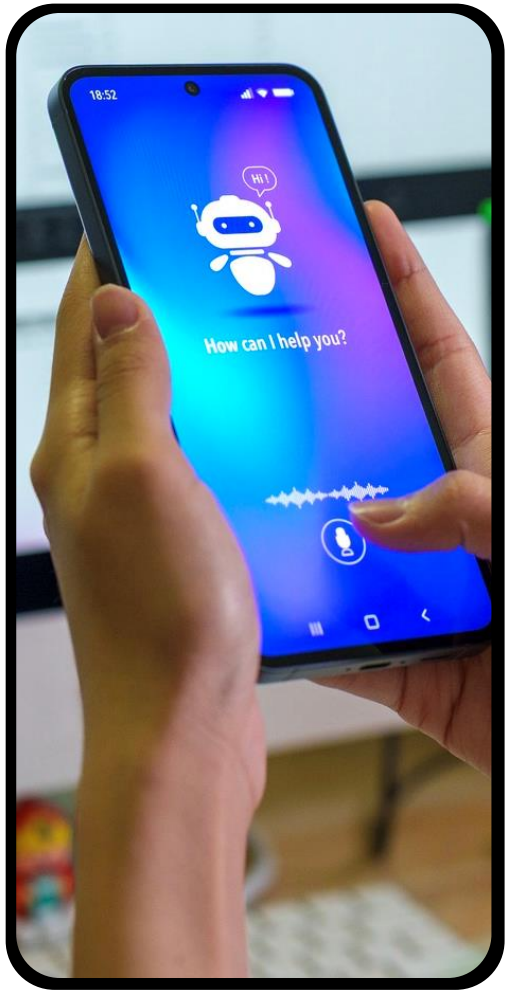
Formats people are using <u>more now</u> than a couple years ago in conversations

% Selected “more now”

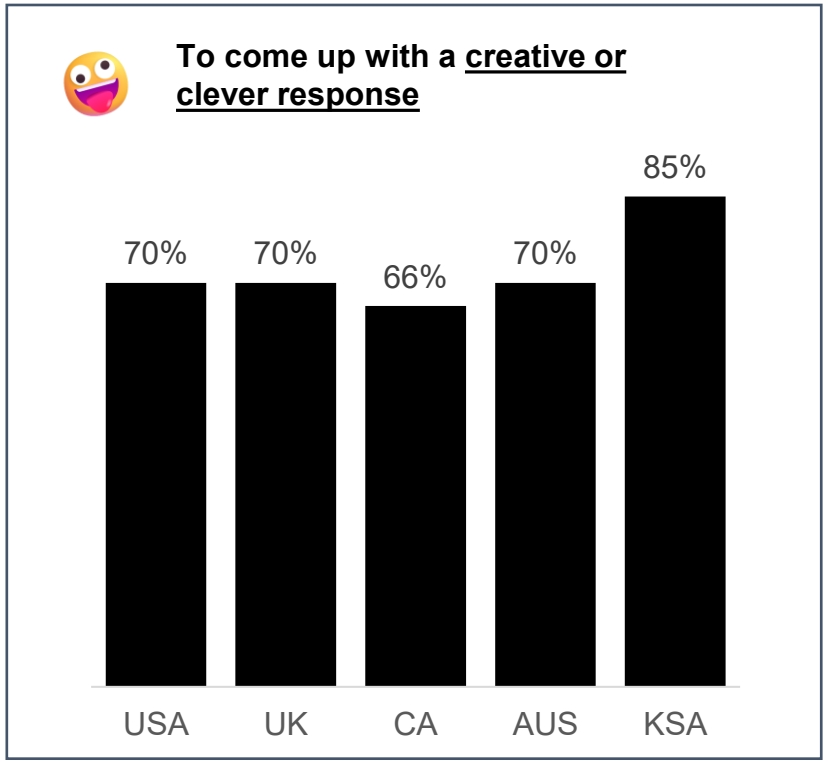


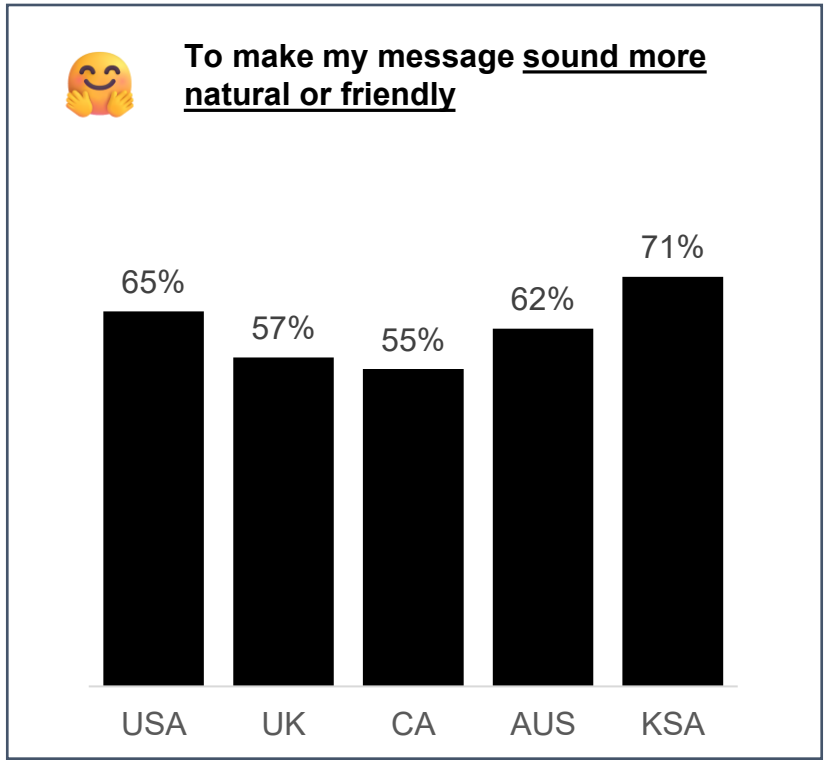
Digital Interviews
Social media users n= 7,860
Images or videos: Net score of those who selected “more now” for images I create, images I find online, videos I create, or videos I find online
*(e.g., using ChatGPT to help you word something or come up with a reply)
Q: Thinking about the last couple of years, do you use any of these differently when talking to people? – Select one for each option

From wit to warmth: AI is powering more expressive conversations



How people use AI to better express themselves in conversations
% Selected “all the time” or “sometimes”





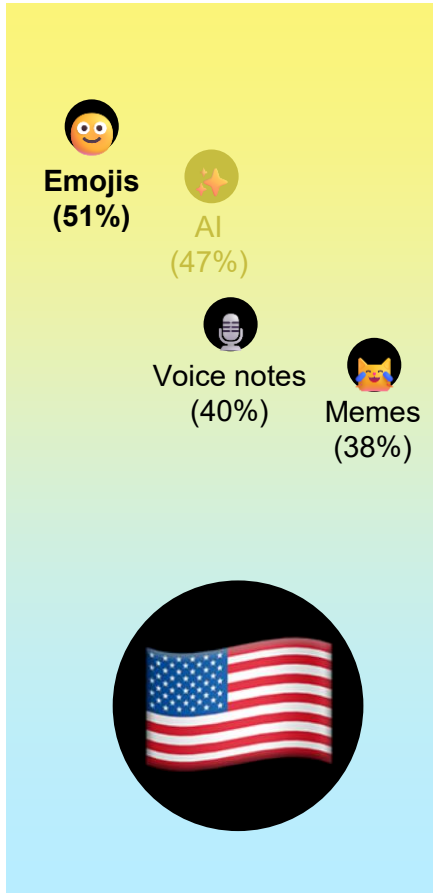
MEDIA TRIALS

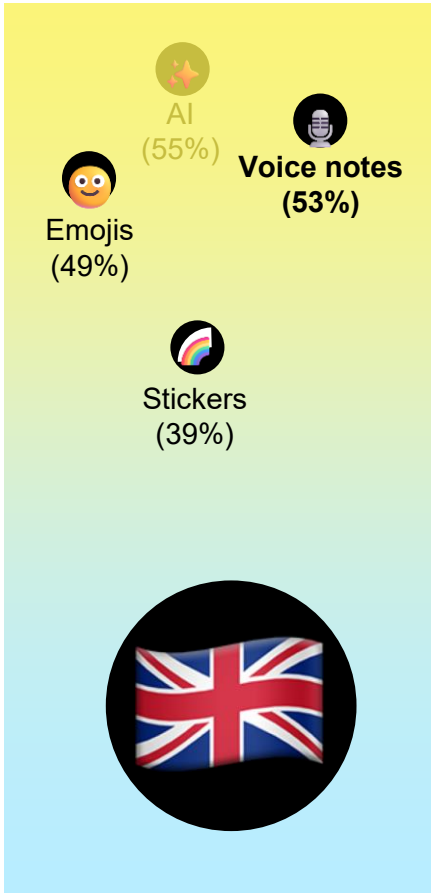
Digital Interviews
Social media users who use AI in conversations n= 7,845
Q: AI tools (like ChatGPT, MyAI, etc.) are picking up and there are many ways you can use it. How often do you use AI for the following? – Select one for each option

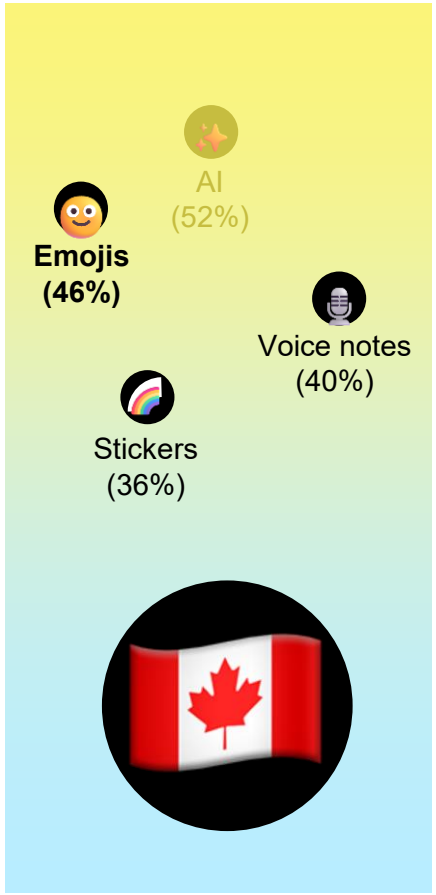
Brands must adapt their communication style to match local norms

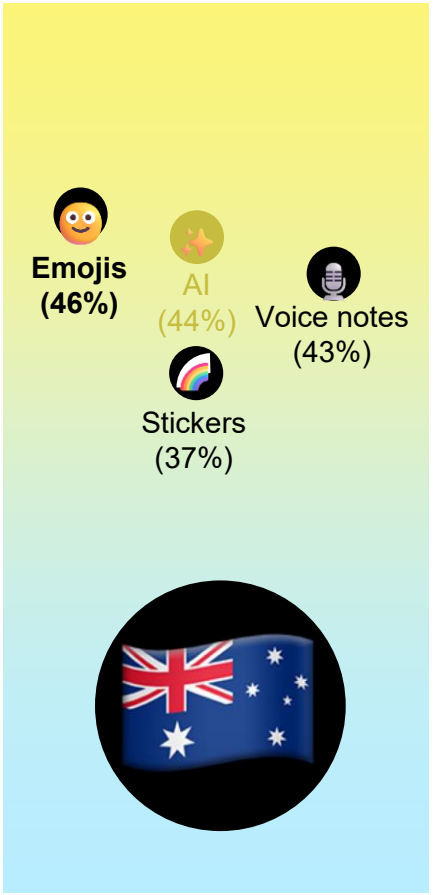
Global brands need to take a different approach in each market

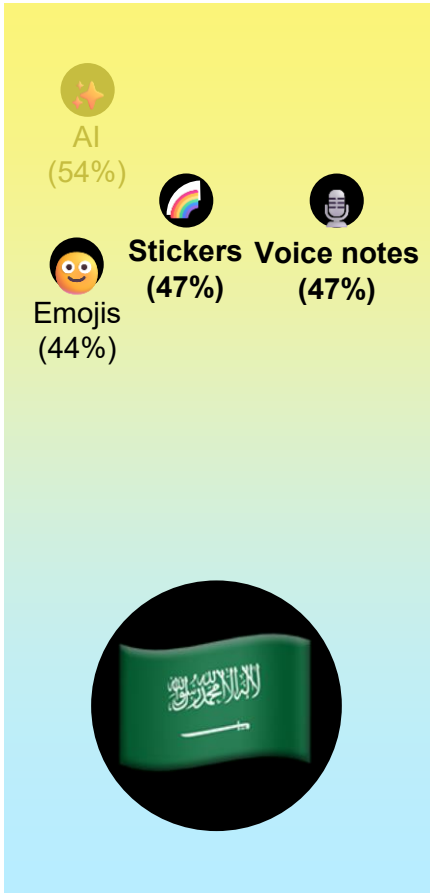
Top formats people are using <u>more now</u> than a couple years ago in conversations
% Selected “more now”









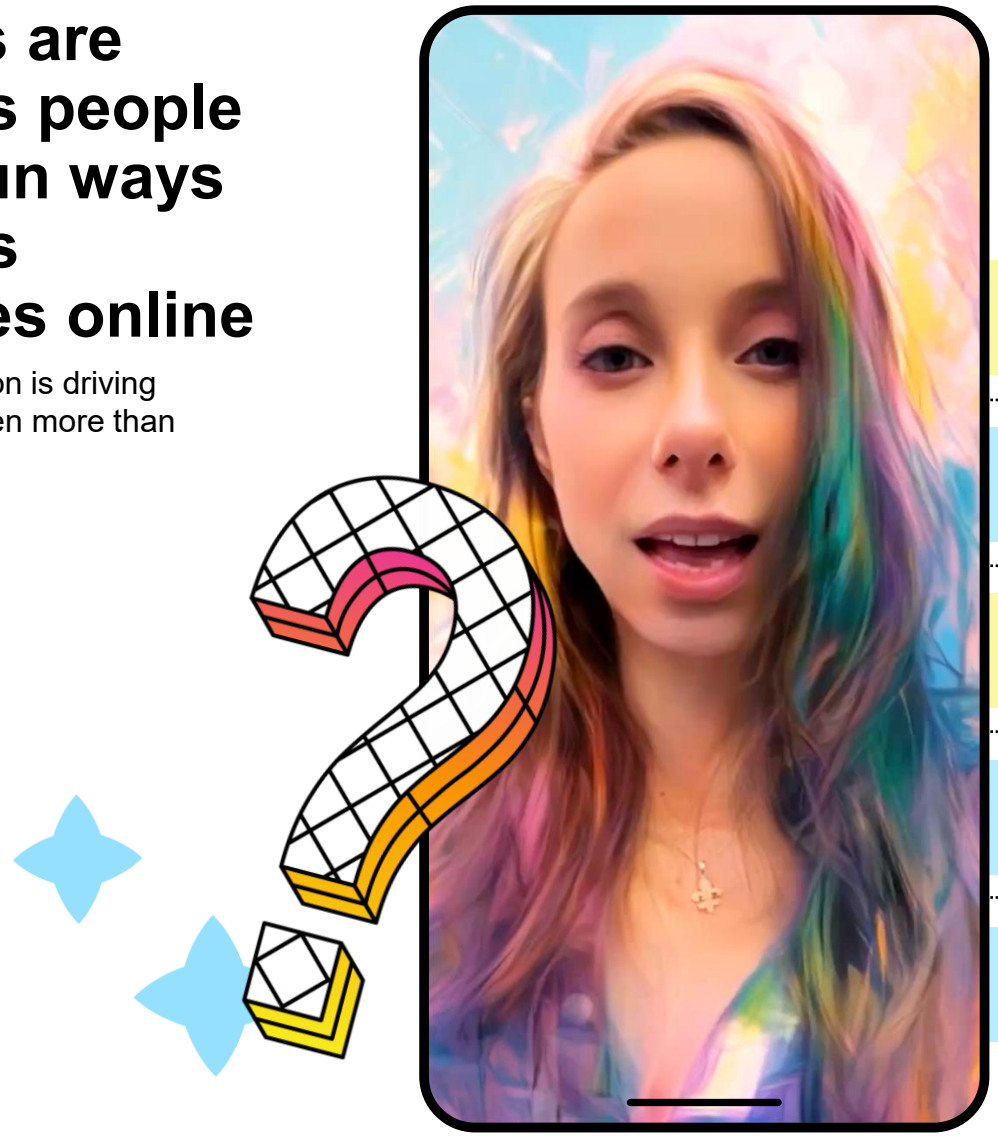


MEDIA TRIALS

Digital Interviews
Social media users n= 7,860
Q: Thinking about the last couple of years, do you use any of these differently when talking to people? – Select one for each option

Behaviors are shifting as people look for fun ways to express themselves online

In fact, self-expression is driving the behavior shift even more than the need for clarity



Reasons why people are using communication formats more now than before in conversations
% Selected

MEDIA TRIALS

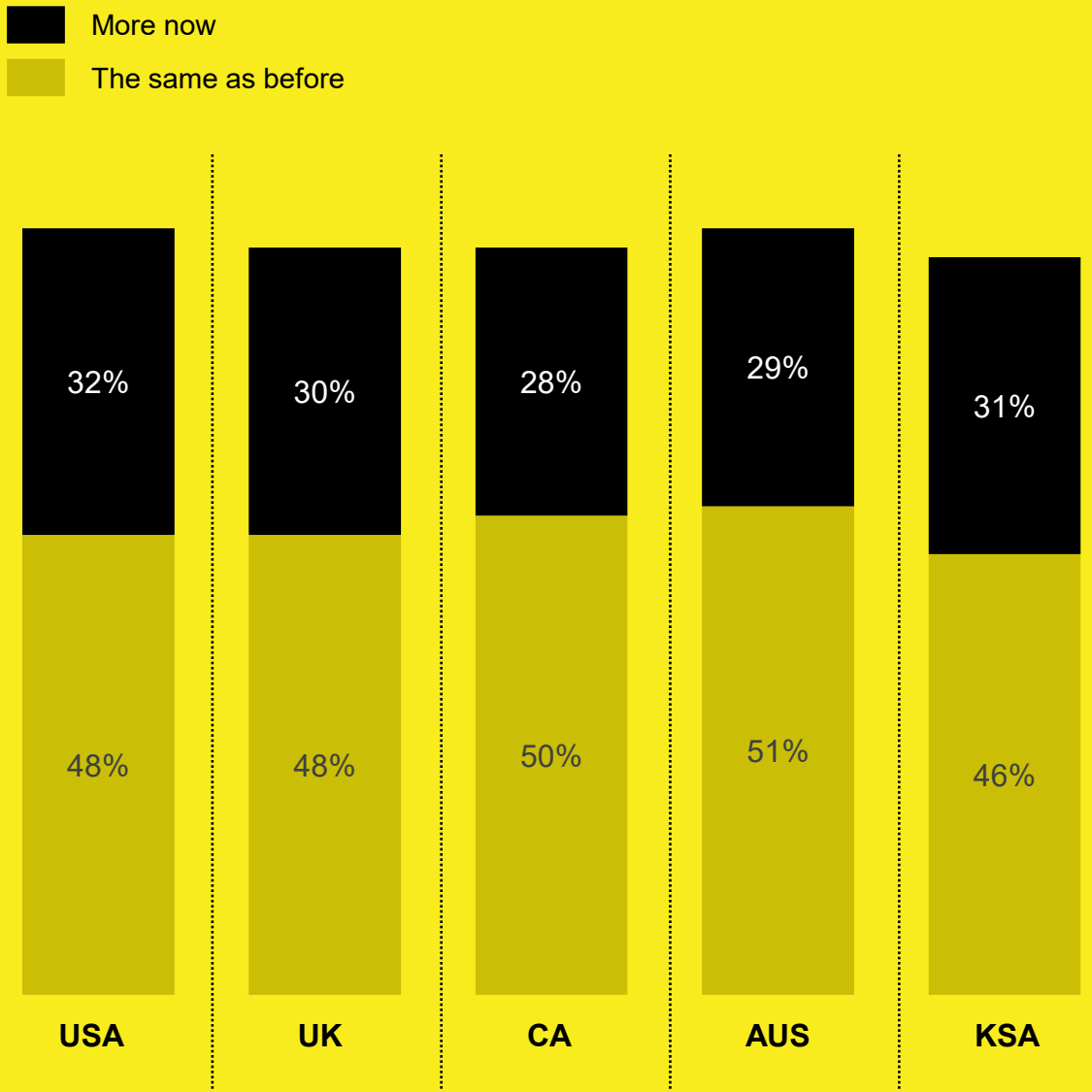
Digital Interviews
Social media users who use formats more n= 6,016
*(e.g., using ChatGPT to help you word something or come up with a reply)
Q: Why do you think you're using some forms of messaging (e.g., emojis, stickers, etc.) more now than before? – Select all that apply

As people express more through visuals, creation is becoming a universal skill

1 in 3

people say they're sharing self-made images or videos **more now** than a couple of years ago

People sharing <u>self-made content</u> now compared to a couple of years ago, in conversations
% Selected



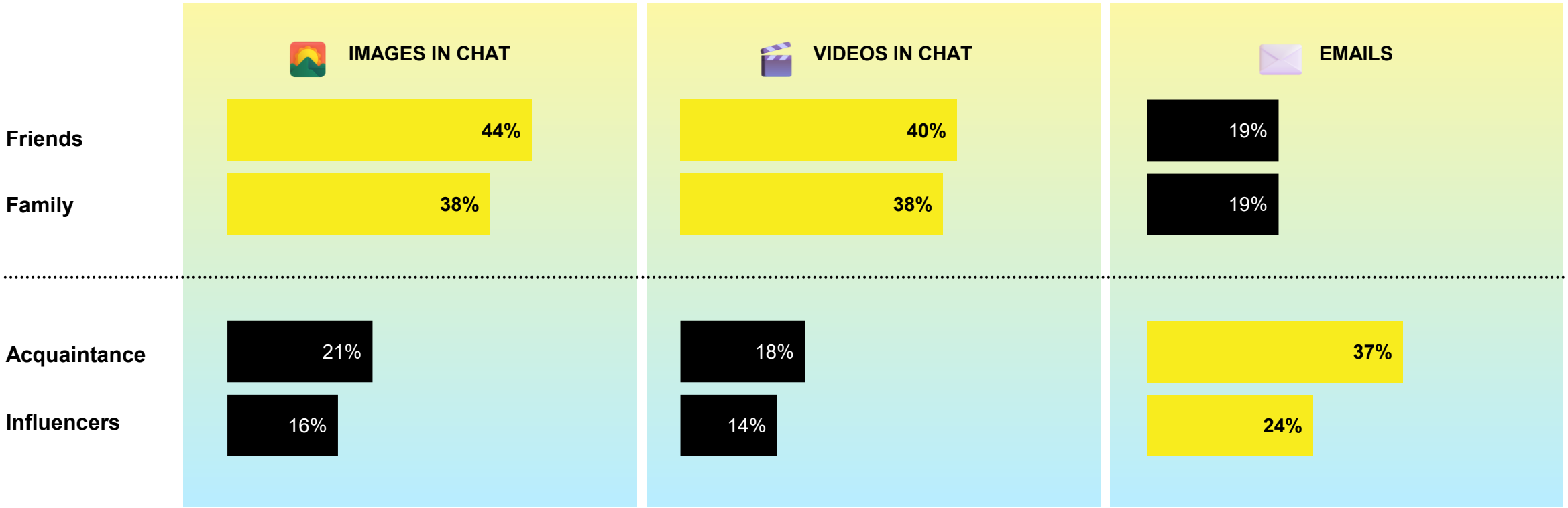
MEDIA TRIALS

Digital Interviews
Social media users n= 7,860
Q: Thinking about the last couple of years, do you use any of these differently when talking to people? – Select one for each option

Closeness decides the channel

People use richer, more visual formats with friends and family. If brands want to be part of inner circles, they must show up like friends – visual, expressive, and human

Formats people are <u>typically</u> using to talk to communicate
% Selected



Digital Interviews
Social media users n= 7,860
Q: How do you usually talk to people online? – Select all that apply for each option

The case for 1:1 communication

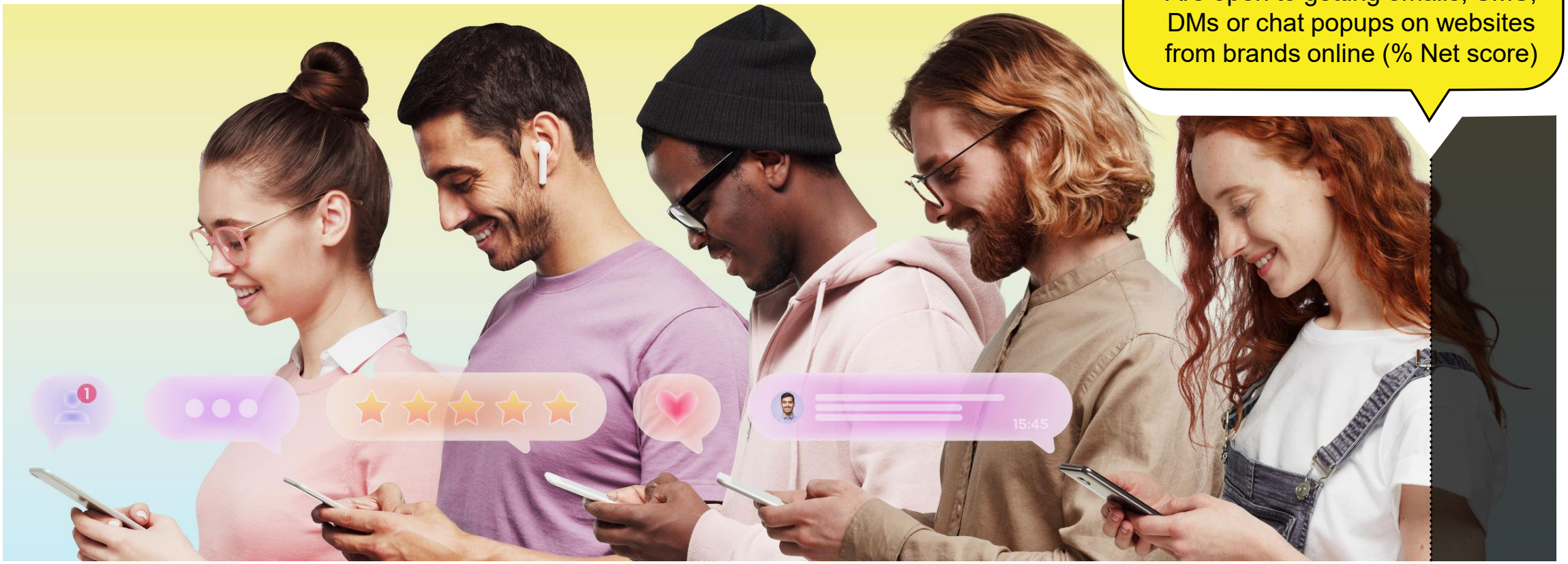
MEDIA TRIALS

People are open to hearing directly from brands through 1:1 channels

Treat 1:1 (e.g., SMS, DMs, etc.) as a primary channel in comms planning

94%

Are open to getting emails, SMS, DMs or chat popups on websites from brands online (% Net score)



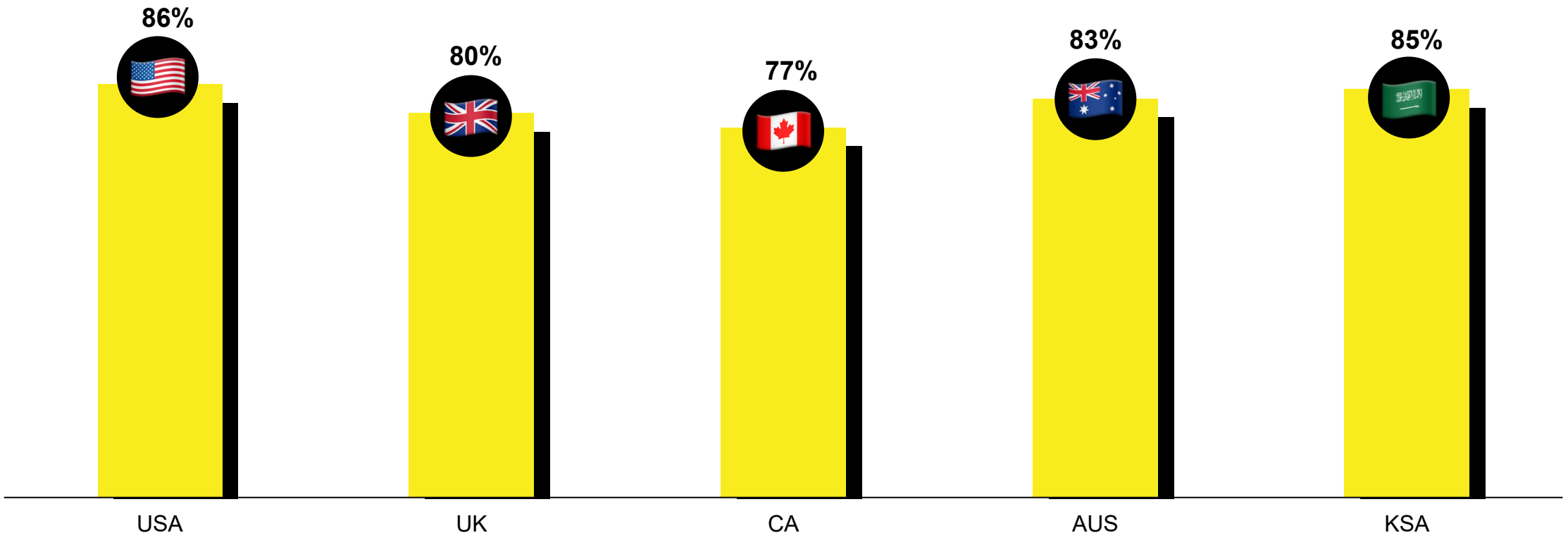
0% 20% 40% 60% 80% 100%

MEDIA TRIALS

Digital Interviews
Social media users n= 7,860
Q: How open are you to hearing from brands in the following ways? – Select one for each option

DMs are welcomed across markets as a direct line to brands

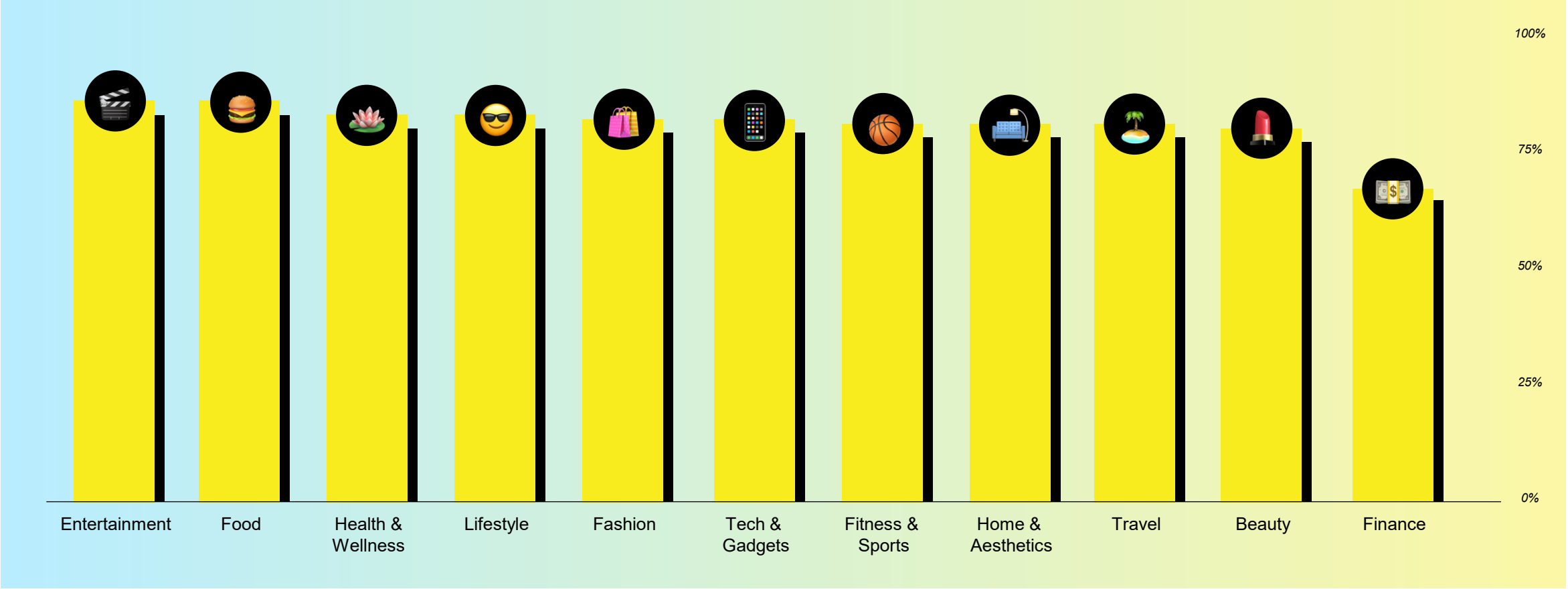
Openness to receiving DMs from brands
% Selected “very open” or “somewhat open”



Digital Interviews
Social media users n= 7,860
Q: Brands might send you a message on apps like Snapchat, Messenger, WhatsApp, etc. They could share tips, discounts, news about their products, or might just want to make you smile. How open are you to getting messages like that? – Select one

And consumers are comfortable with brands from a variety of categories reaching out

Comfort with receiving DMs from brands in different verticals
% Selected “very comfortable” or “somewhat comfortable”



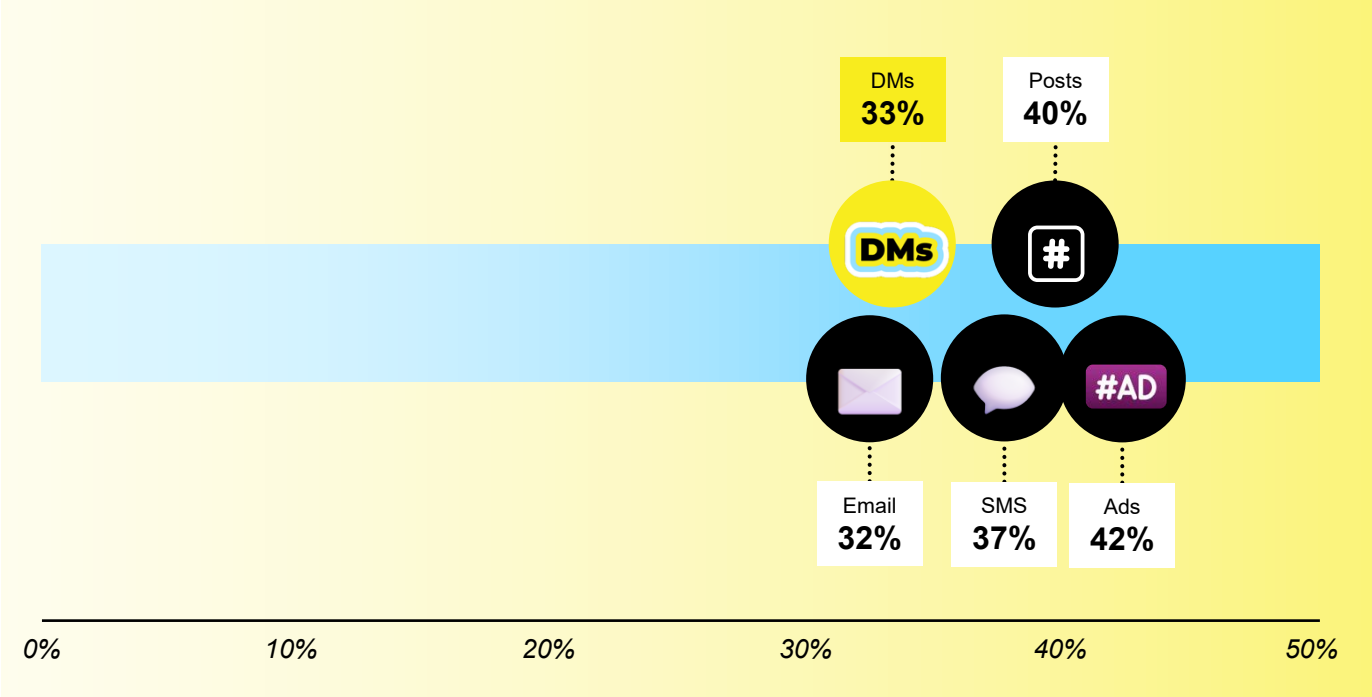
MEDIA TRIALS

Digital Interviews
Social media users n= 7,860
Q: How comfortable would you feel if a brand from each of the categories below messaged you out of the blue (without you asking first) on apps like Snapchat, Messenger, WhatsApp, or iMessage? – Select one for each option

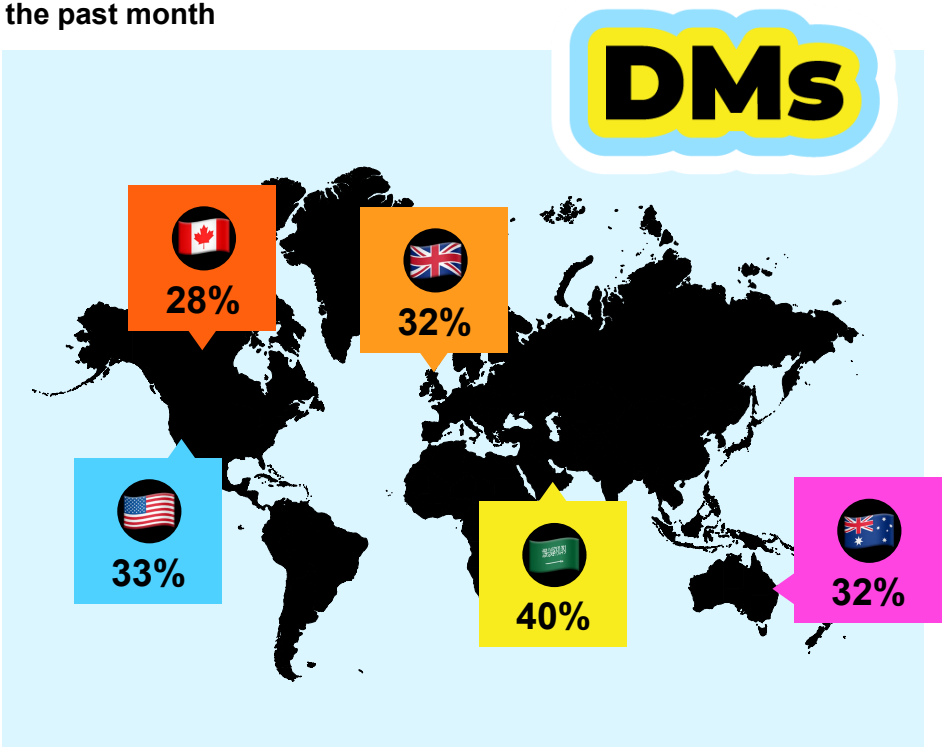
In fact, engagement through brand DMs is on par with emails

In the past month, 1 in 3 people engaged with brands via DMs – on par with email and close to SMS, while posts and ads still lead in volume

Places people engaged with brands in the past month
% Selected



% who engaged with a brand via DMs in the past month



MEDIA TRIALS

Digital Interviews
Social media users n= 7,860
Q: Where have you engaged with brands online in the past month? This could mean liking or commenting on their posts, messaging them, sharing their content, tagging your friends, etc. – Select all that apply

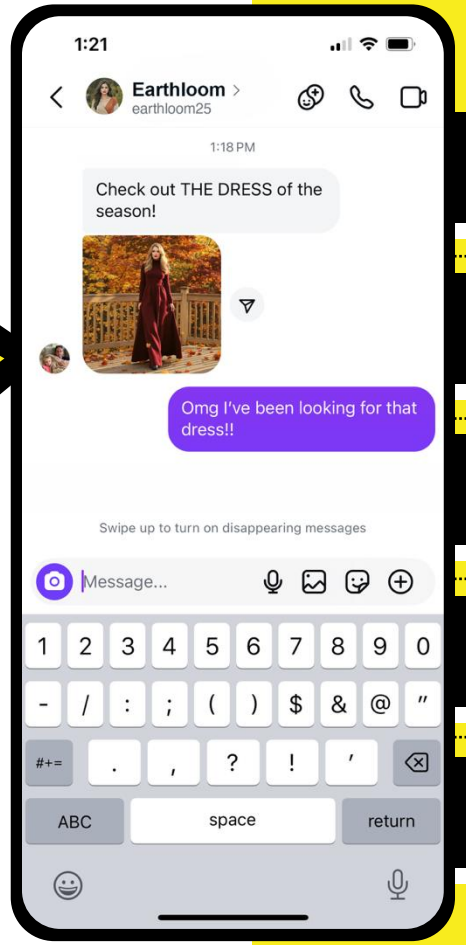
DMs from brands shift consumer perception in meaningful ways

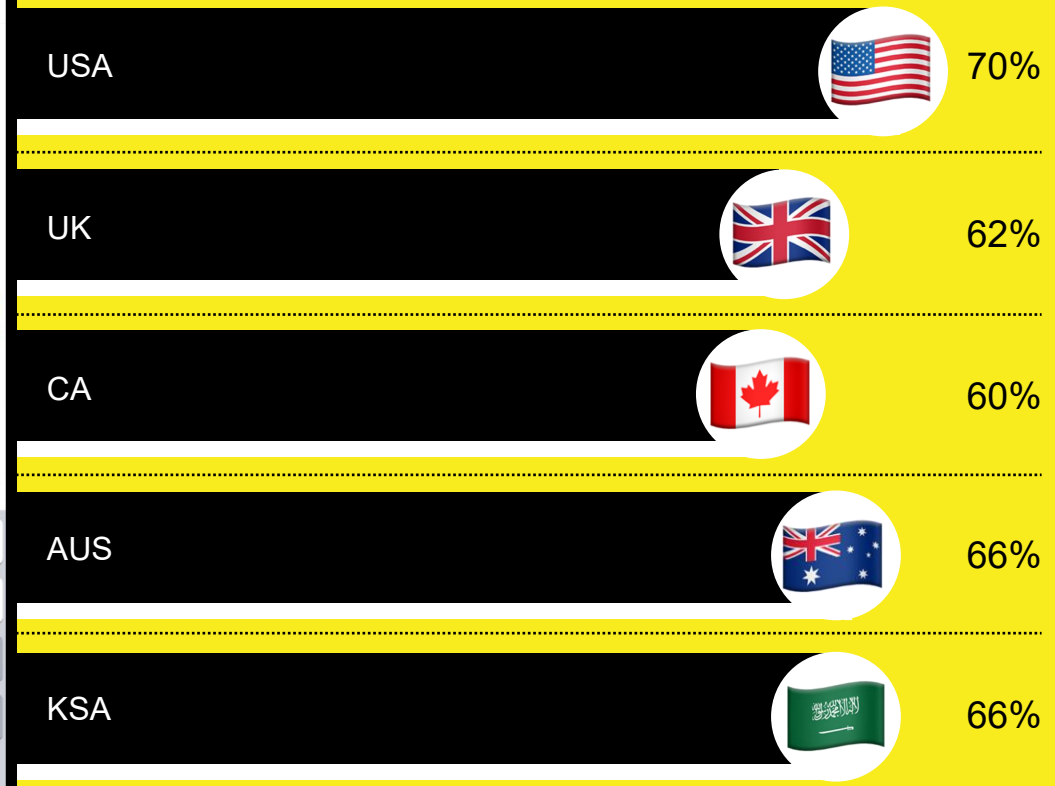
~1 in 3 say it feels like the brand actually cares if the brand reaches out first; this rises to 41% when the brand replies to a consumer DM

65%

Have positive opinions of brands that message them in DMs
% Net score

1. Brand feels more innovative
2. Trust the brand more
3. Brand feels more like a friend
4. Like the brand more





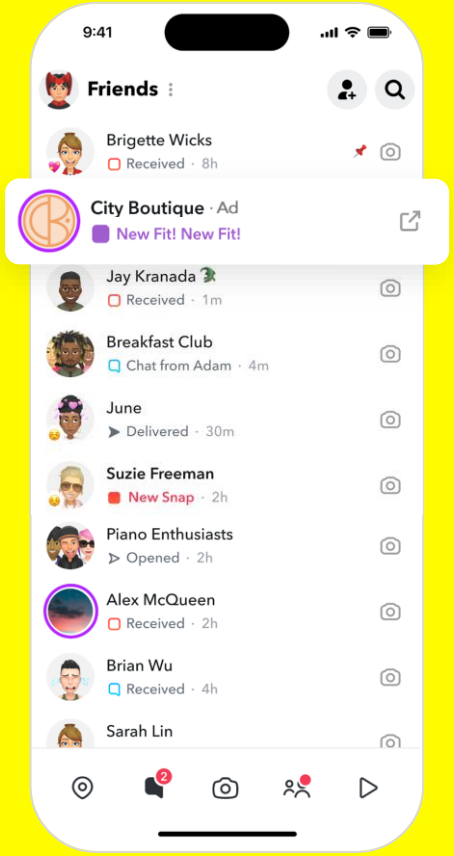
Digital Interviews
Social media users n= 7,860
Q: If a brand messages you in your DMs, how (if at all) does it change how you see them? As a reminder, DM messages from brands are private messages companies send you on social media – like promos, updates, or quick replies – Select all that apply

Enter sponsored chats

A multi-touch strategy

MEDIA TRIALS

What are sponsored chats?
(aka. Sponsored Snaps)

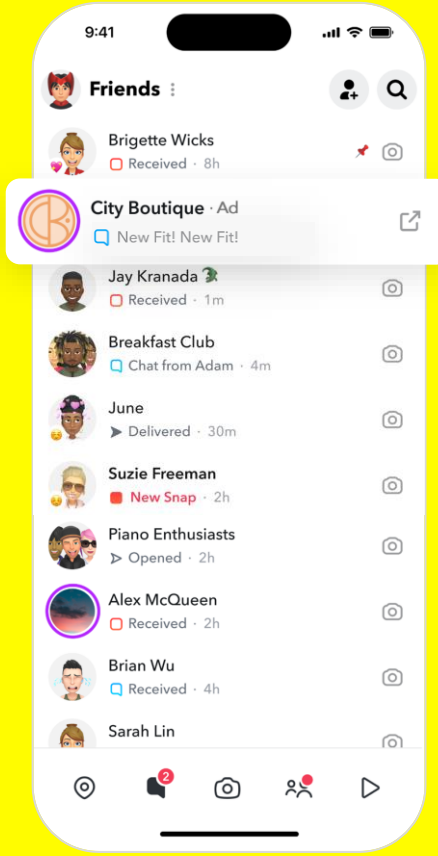


1

Send a Snap directly to the Chat Feed

2

Snapchatters can open the Snap to full-screen media



3

Snapchatters return to Chat Feed

4

Opening the Snap again leads to 1:1 Chat, with ***optional*** response from advertiser

MEDIA TRIALS

We put sponsored chats to the test

Controlled testing using an experimental design survey to measure the impact of different ad formats on branding KPIs

Total n= 5,000

Three brand verticals:
Apparel, Travel, Clothing

Two markets:

Tested 5 Ad Types

Sponsored Chats
aka. Sponsored Snaps on Snapchat

1 Exposure

Video ads aka. Commercials on Snapchat

2 Exposures

Sponsored Chat + Video ad
on Snapchat

2 Exposures

In-feed video ads
on another social media platform

2 Exposures

Sponsored Chats + In-feed video ads
on another social media platform

2 Exposures

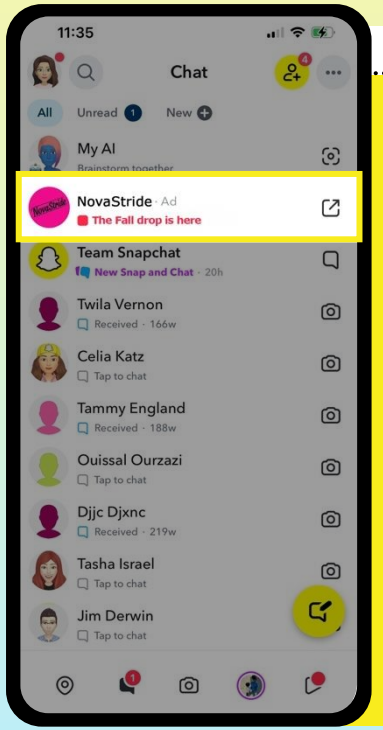
3 Types of Ad Captions in Sponsored Chats

Curiosity-driven captions:
The caption is often phrased as a question, designed to spark curiosity (e.g., “Felt like your vibe?” “Why do these feel so right?”)

Brand-forward captions:
The caption includes the brand name, often resembling a slogan (e.g., “More legroom on Hawaiian.” “Live in True Religion.”)

Emotional identity captions:
The caption speaks to the viewer in a platform native way (e.g., “You’d flex in these.” “Not us spoiling you.”)

Sponsored chats spark attention, and there's more to unlock

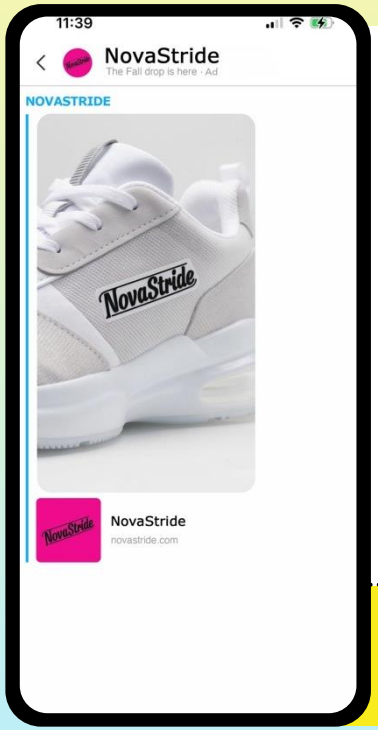


93%

Reported noticing the sponsored chat

59%

Naturally opened the sponsored chat without any prompt



20%

Naturally opened the chat window for further interaction

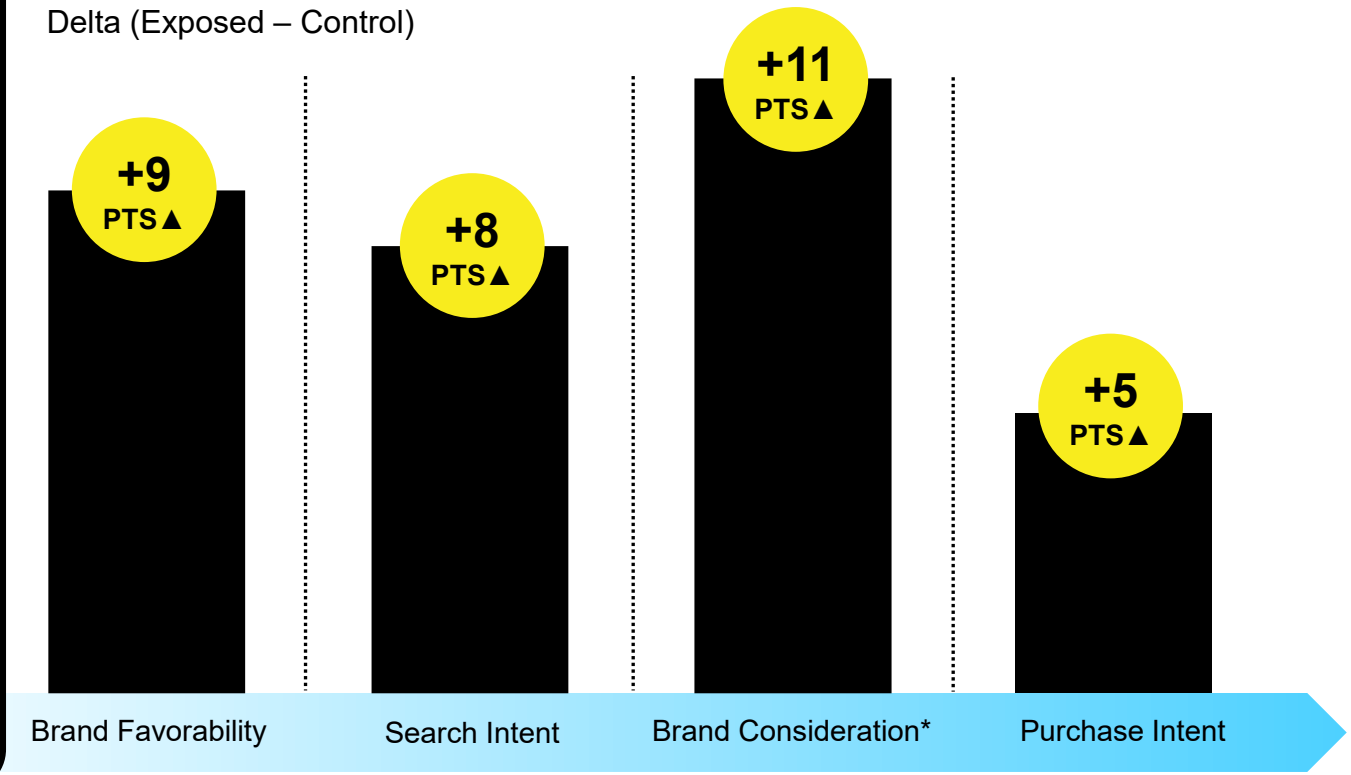
MEDIA TRIALS

Ad Effectiveness
Sponsored chat, Exposed n= 639
Q: [Test brand] sent you a snap on your Snapchat earlier. Do you remember seeing it? – Select one
Q: Why did you choose not to open the Snap? – Select all that apply

Beyond awareness, sponsored chats drive bottom funnel metrics

Impact on brand KPIs from sponsored chats

Delta (Exposed – Control)



Ad Effectiveness
Sponsored chat, Exposed n= 639; Control n= 496
*Brand consideration: Test brand is high in consideration list the next time people are looking to buy the category
▲ = statistically significant difference between exposed & control at >=90% confidence

Sponsored chats/DMs from brands

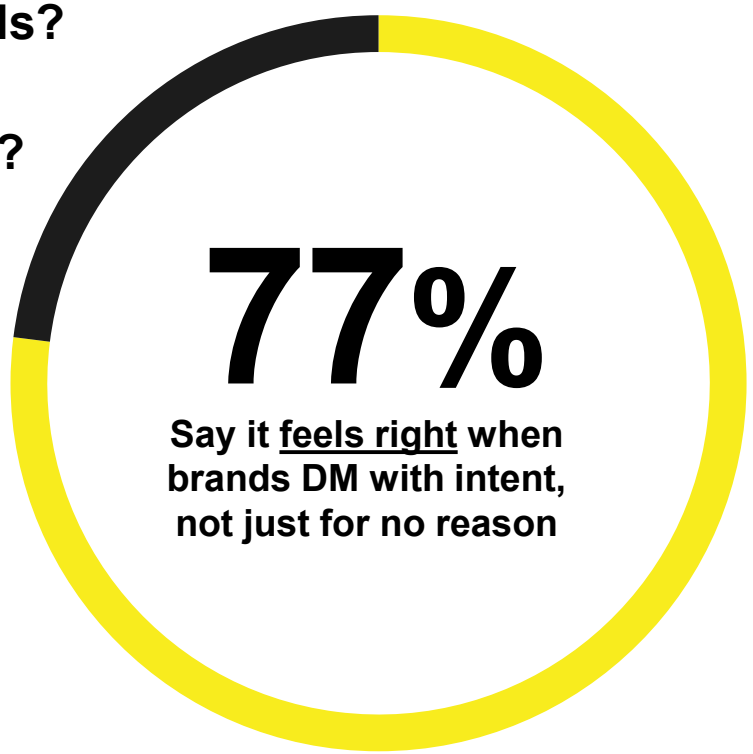
Rules of engagement

MEDIA TRIALS

1 DMing is not a free-for-all strategy. Consumers demand purpose

Random DMs?
Hard Pass.

Timely DMs?
Yes, Please.

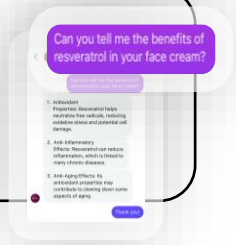


The right moments for brands to slide into DM
Top 3 moments

1. When the brand has something **timely** to share (32%)

2. When the person is **already considering** something the brand offers (29%)

3. When the person **messaged the brand first** (29%)

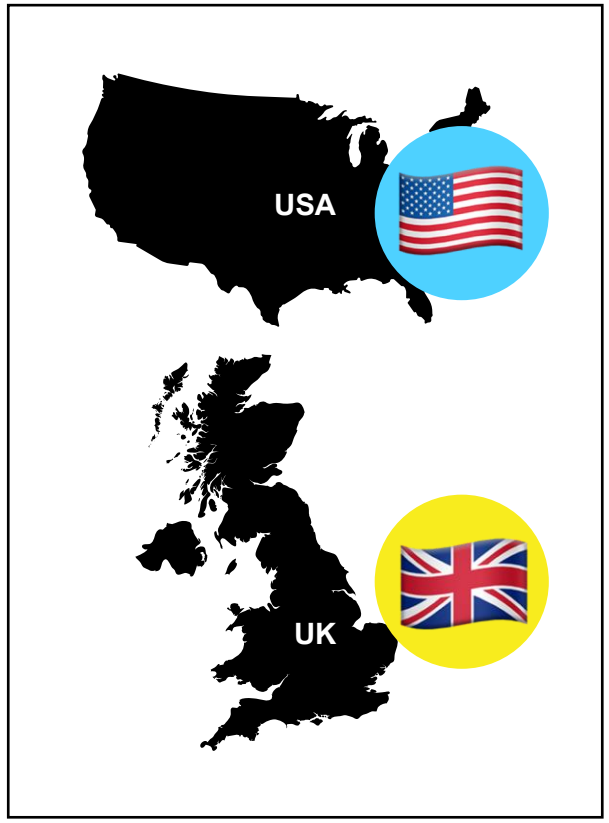


MEDIA TRIALS

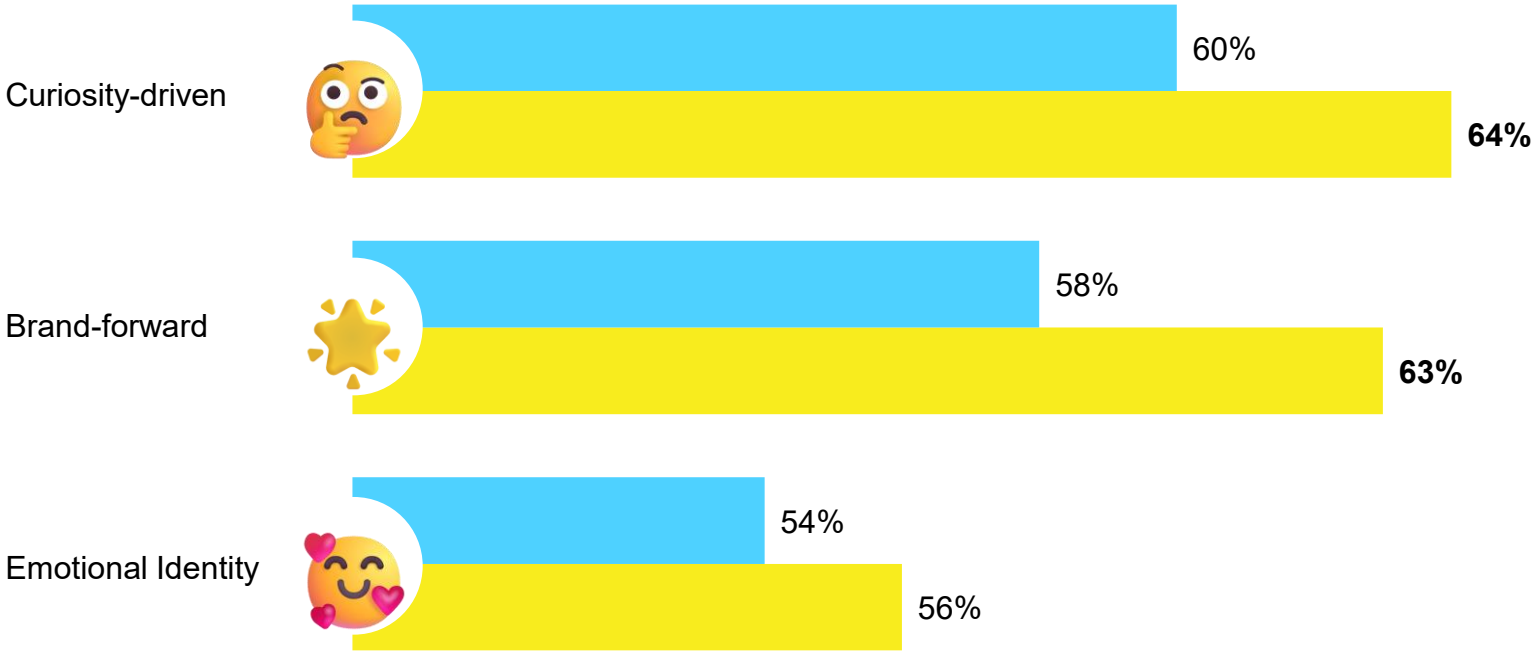
Digital Interviews
Social media users n= 7,860
Q: You mentioned you're open to getting messages from brands. When does it feel like the right time for them to reach out? – Select all that apply

2 To boost engagement with sponsored chats, lead with curiosity-driven or brand-forward captions

Prompting curiosity or showcasing brand presence sparks user action more effectively than emotional tone alone, especially in the UK



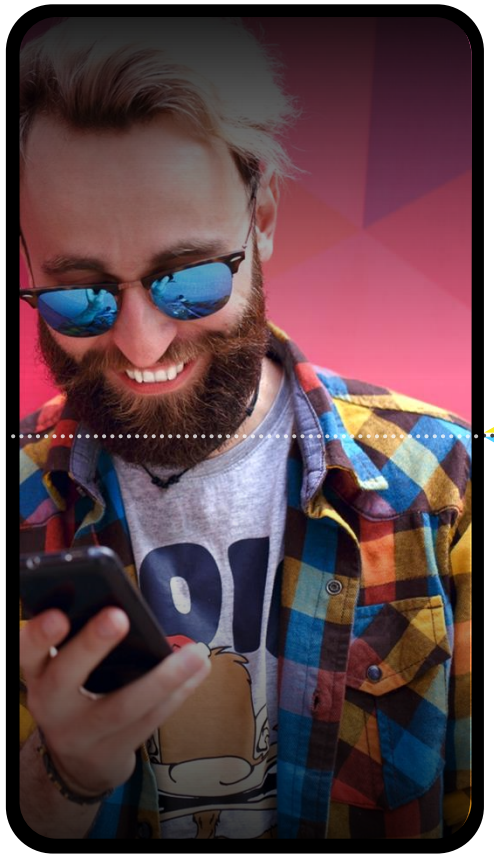
Sponsored chat <u>open rates</u> by caption included
% Opened



Ad Effectiveness
Sponsored chat, Exposed n= 639
Curiosity-driven caption: The caption is often phrased as a question, designed to spark curiosity (e.g., “Felt like your vibe?” “Why do these feel so right?”)
Brand-forward caption: The caption includes the brand name, often resembling a slogan (e.g., “More legroom on Hawaiian.” “Live in True Religion.”)
Emotional identity caption: The caption speaks to the viewer in a platform native way (e.g., “You’d flex in these.” “Not us spoiling you.”)

3 Blend intrigue with identity for max impact

Curiosity-driven captions build intrigue; brand-forward captions boost consideration



Impact of chat caption
Delta (Exposed – Control)

Search Intent

Curiosity-driven caption

+7PTS▲

Brand-forward caption

Brand is in the consideration set

+17PTS▲

MEDIA TRIALS

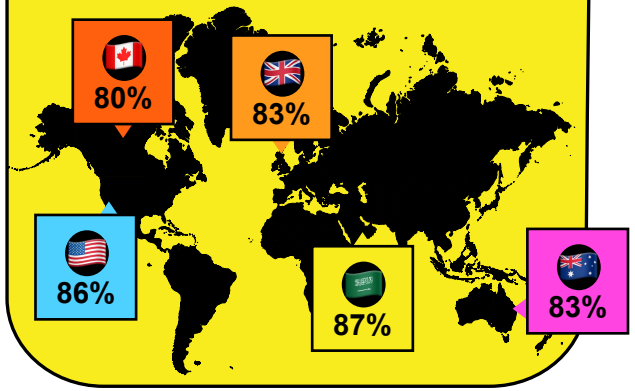
Ad Effectiveness
Sponsored chat, Exposed n= 639; Control n= 496
Read as: Curiosity-driven captions drive search intent (+7pts), while other caption types do not have any significant impact on search intent

4 Partner closely with creators to reach out in chats/DMs

84%

Are open to hearing from creators about brands

% Selected "very open" or "somewhat open"



Rules of engagement

When choosing creators, skip the script and keep it real

What would make brand messages from creators feel "right"

% Selected

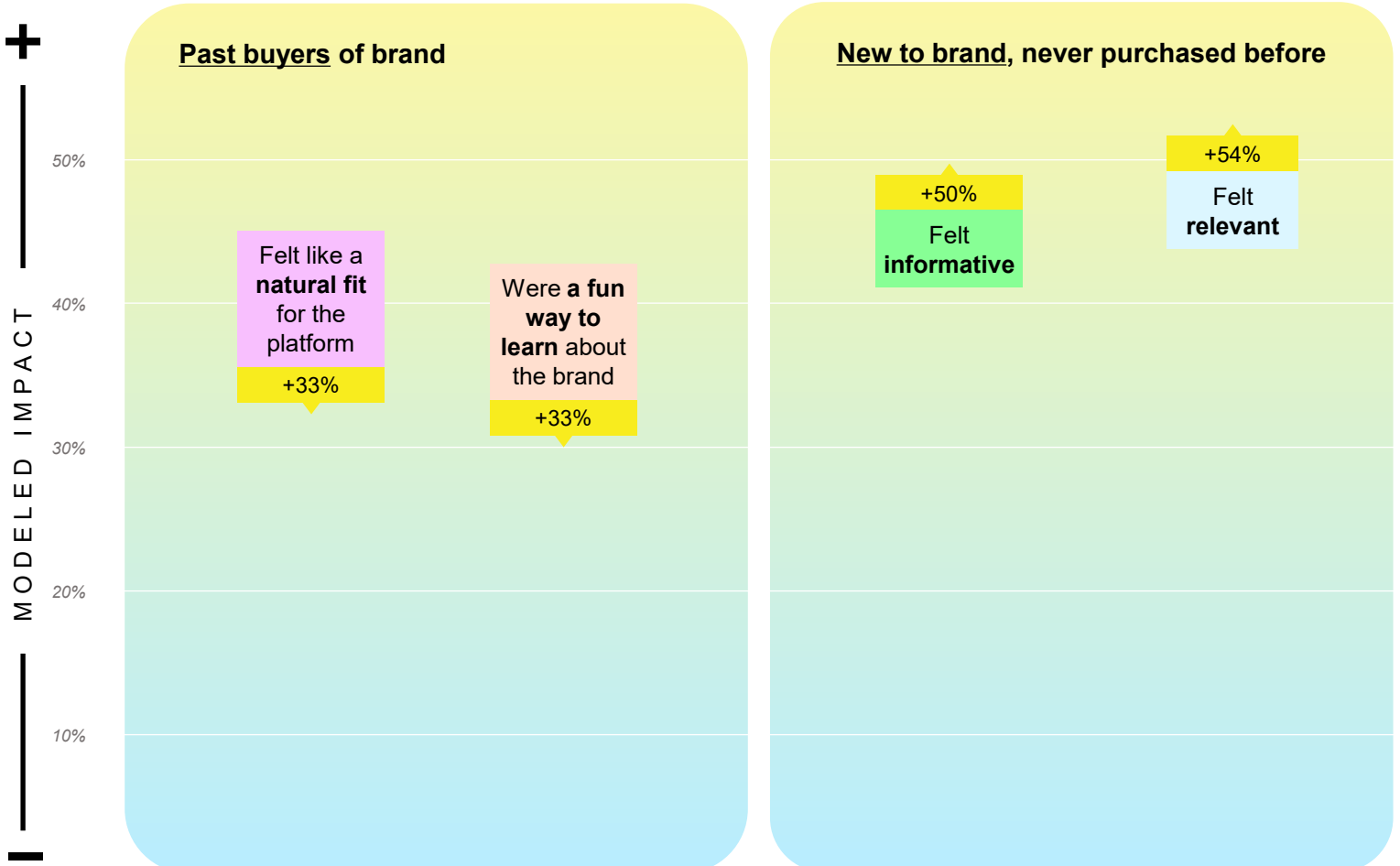
1. They talk like themselves, not like a copy-paste ad (50%)
2. They're upfront that it's a paid post (47%)
3. It's in a format I like (39%)
4. It fits the vibe of the app (37%)
5. The tone is light and fun (36%)

Digital Interviews
Social media users n= 7,860
Q: How open are you to hearing from brands in the following ways? Posts from creators or influencers talking about a brand – Select one for each option
Q: If a creator or influencer sent you a message about a brand, what would make it feel right to you? – Select all that apply

5 Tailor sponsored chats to audience to build authenticity

Impact of perception of sponsored chats on <u>brand authenticity</u>
Modeled Lift

- Among <u>familiar audiences</u>, chats that feel like a natural fit or offer a fun way to learn about the brand enhance authenticity
- For <u>new prospects</u>, chats that feel relevant and informative create authenticity



Ad Effectiveness
Sponsored chat, Exposed n= 639; Control n= 496
The chart reflects a logistic regression model measuring the contribution of each ad type in driving brand impact

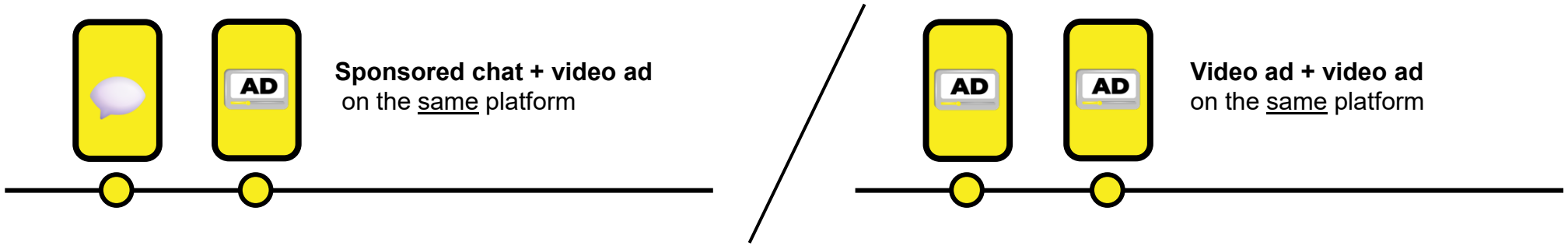
6 Light-hearted messages for memorability Discounts and back-in-stock alerts for consideration

Ranking of brand DM type to impact on brand	Remember the brand	Check out the brand	Consider buying from the brand
Lighthearted, feel-good stuff	1	9	8
Playful brand experiences	2	8	7
Behind-the-scenes content or sneak peeks	3	5	9
Contests or giveaways	7	1	4
New product updates/announcements	6	2	5
Helpful tips or how-to's	4	3	6
Special discounts or promo codes	9	4	1
Back-in-stock alerts for products I've liked	8	7	2
Personalized recommendations just for me	5	6	3

MEDIA TRIALS

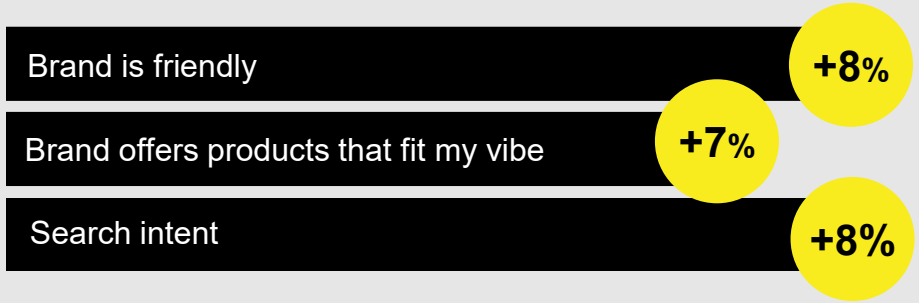
Digital Interviews
Social media users n= 7,860
Q: What kind of brand DMs would make you more likely to remember, check out, or consider buying from the brand? – Select one for each option

7 Pairing chats with video unlocks synergy. Use them together to drive emotional connection



Incremental Brand Impact: Sponsored Chat + Video vs. Video Only

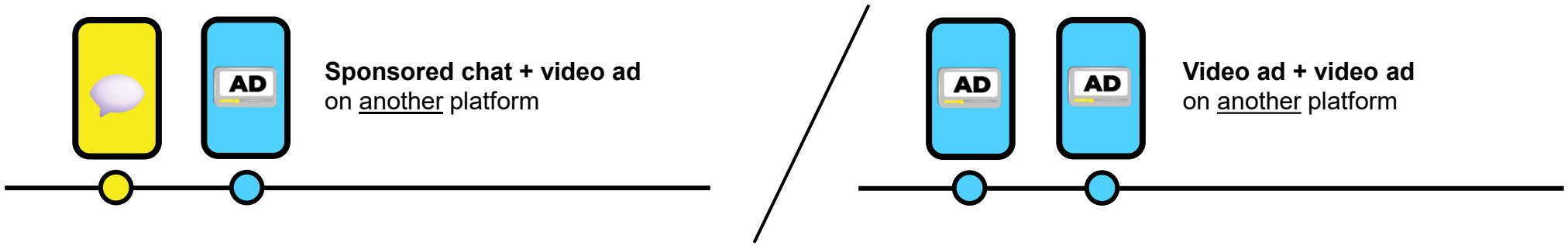
% Incremental lift



MEDIA TRIALS

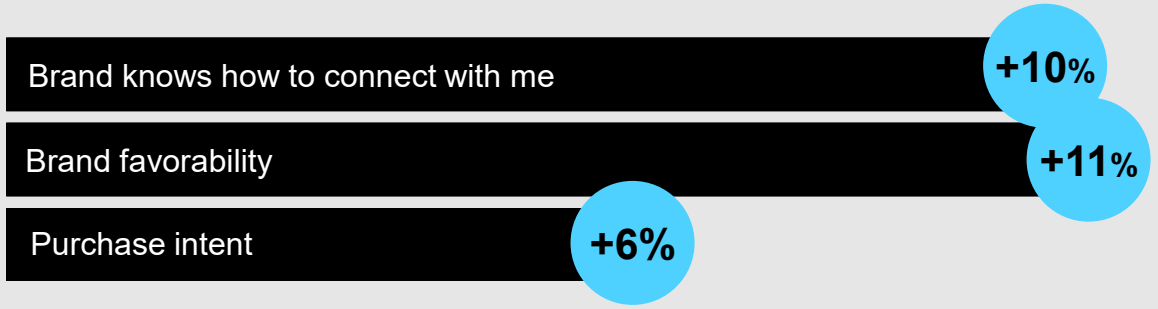
Ad Effectiveness
Sponsored chat + commercial (on the same platform), Exposed n= 501, Control n= 499
Commercial + commercial (on the same platform), Exposed n= 499, Control n= 499

8 Integrate sponsored chats into cross-platform campaigns to amplify results



Incremental Brand Impact: Sponsored Chat + Video vs. Video Only

% Incremental lift



MEDIA TRIALS

Ad Effectiveness
Sponsored chat + video (on another platform), Exposed n= 500, Control n= 502
Video + video (on another platform), Exposed n= 500, Control n= 500

Implications

1

Visual is the new voice of digital

Visual expression is becoming the dominant language online

Brands need to communicate visually – think images, emojis, GIFs, short videos – to join real conversations

2

Yay to DMs from brands

People welcome brand messages in DMs, and they can drive real performance

Success comes from relevance and timing; reach out when it feels natural, not forced

3

Sponsored chats are effective, but proceed thoughtfully

Brands should follow best practices when planning their DM or chat strategy, as this remains a relatively new space

Use the right captions to draw audiences in, partner with creators for hyper-relevance, and blend chats with video ads for maximum impact

hi!
no bad days
MEDIA TRIALS
Thank
You