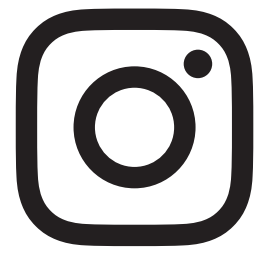
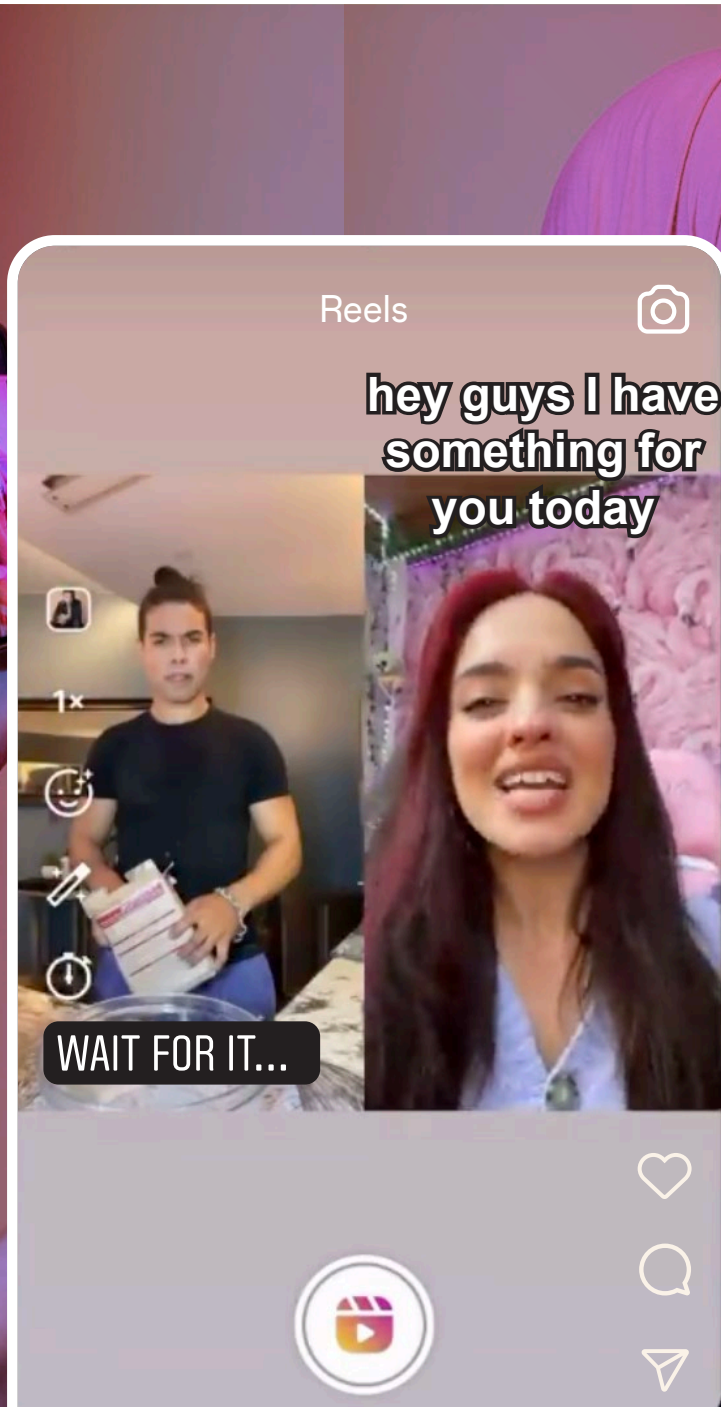


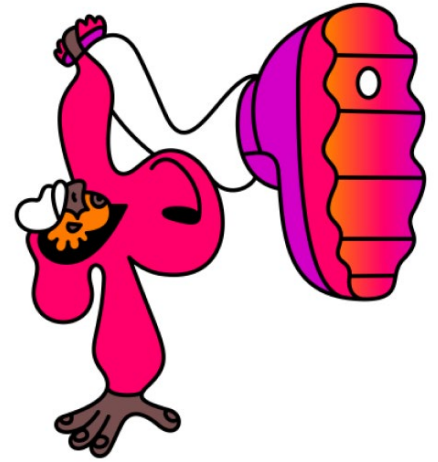
Shift to Short



THE REPORT



This report explores the user experience in the rapidly evolving Short Form Video category.



Drawing on learnings and data from a global study conducted by Factworks and local independent research agency Hoop Group, this report was commissioned by Meta Australia to delve deeper into the local user experience.

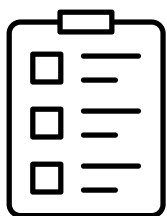
Shift to Short: The Report uncovers cross-platform insights that identify opportunities, considerations, and imperatives for brands to thrive using Reels.



APPROACH



Global Consumer Survey



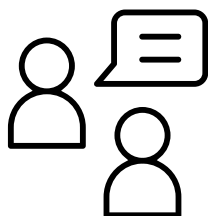
**Online survey:
15 minutes
duration**

Australian Sample n=1,400

Target: Users of SFV
aged 13-64

Timing: Oct–Nov 2022

Local Consumer Interviews



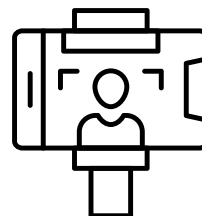
**1:1 Consumer
Interviews:
45 minutes**

Participants: n=40

Target: Users of SFV
aged 18-52 (skew to GenZ
+ Millennials)

Timing: Dec 2022–Feb 2023

Local Creator Interviews



**1:1 Creator
Interviews:
30 minutes**

Participants: n=10

Target: Creators of SFV
aged 18-38
(skew GenZ)

Timing: Dec 2022–Feb 2023

Global study commissioned by Meta, conducted by Factworks

Australian study commissioned by Meta Australia, conducted by Hoop Group



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1. Trending

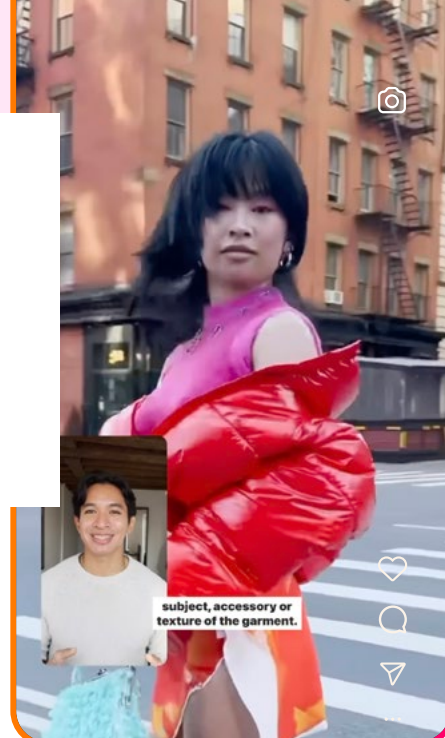
THE ERA OF SFV



The rise of short form video

The growth of short form video content (SFV) on social media is explosive and is changing the way Australians interact with their smartphones, brands and each other. The appetite for video is only growing, fed by a rich variety of content that meets the need for entertainment, fun, escapism, knowledge and connection.

SFV content is tailored to match the individual needs and desires of the viewer, delivered at speed right into the hands of the consumer, available anywhere, anytime.



More than
6/10
view SFV* each week
[*Instagram or TikTok]

Source: Global Web Index, 7,986 Internet Users
in Australia, aged 16-64, Q1 2023

A big shift in viewing preferences



“It’s all anyone is watching these days, on the bus literally everyone is scrolling through videos, I actually really like seeing what people are watching”

THEA, 32



Consumers were observing shifts in their own viewing habits, including a growing appetite to fit ‘more’ into their viewing.

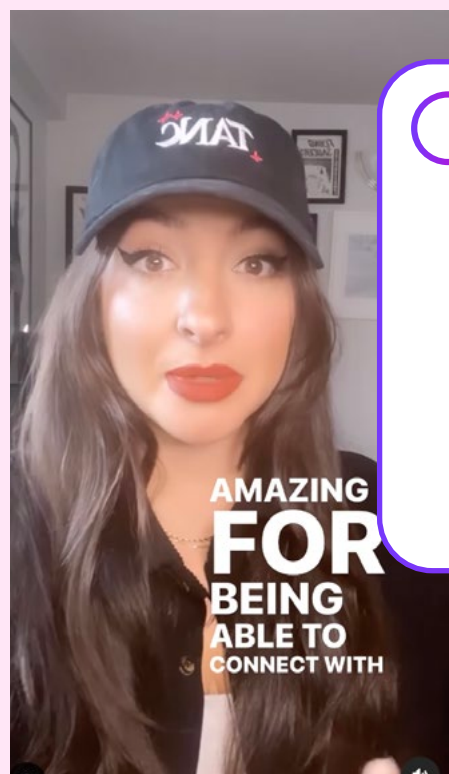
Brands would do well to note the **opportunity** to provide consumers with more content calories in the form of **snackable videos**.

Shorter = Better

Research confirms there is a strong consumer led pull towards SFV. Social apps are all re-calibrating their offering to align to consumer preference for video. Even long form publisher Netflix, added SFV on their app, offering viewers the opportunity to snack.

Faster = More Efficient

Consumers expressed their love of faster paced content via SFV, noting that it was allowing them to absorb more information, faster than ever before. The efficiency available in SFV is a key driver for shifts in viewing habits.

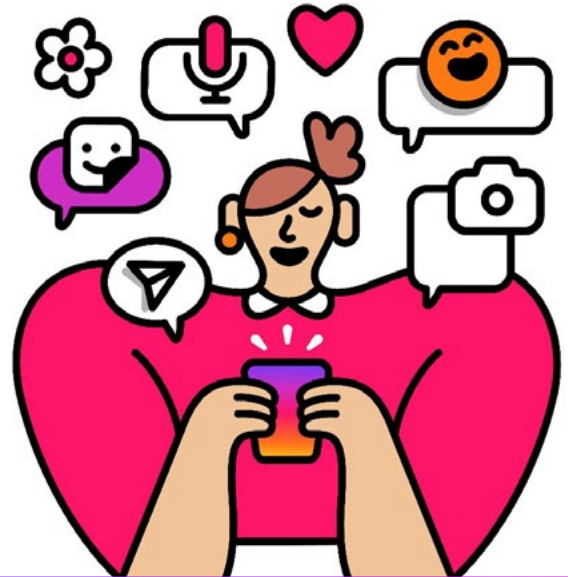


“I would rather spend 20 minutes on Reels, for example, compared to a 10 minute YouTube video, which is just one piece of content for a long period of time. I feel like I absorb more through a Reel because it’s so short and you can scroll through quickly. I’m not inclined to watch longer videos anymore”

RACHEL, 21

More growth ahead

The trend towards SFV is expected to continue, driven by the increasing number of users creating content and by brands embracing the opportunity to engage deeply with consumers in the video playground.



“We want a quick fix, everything is easier now, we are so used to having and expecting everything at our fingertips”

TESS, 30

More effective

“Videos will always be important because you just can’t convey what you need to in a photo”

SHAE, 21

More engagement

“I need to start prioritising and making more videos for my business as they get higher engagement when I do”

MATT, 31

More participation

“Reels will only get bigger as more everyday people, rather than just influencers, make more short form video”

NED, 19



“Everyone is absorbing so much information, they are glued to their phones, not many people are glued to their TV like they are their phones”

BRUNA, 25



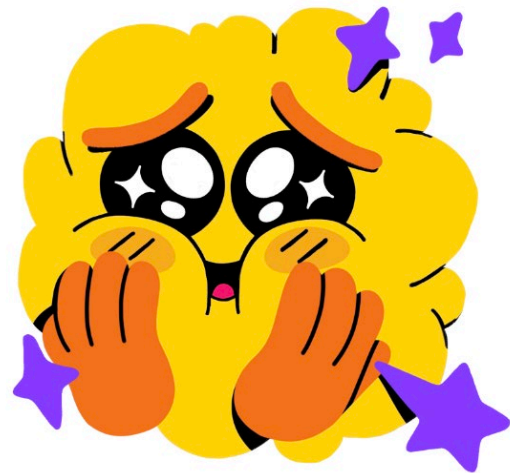
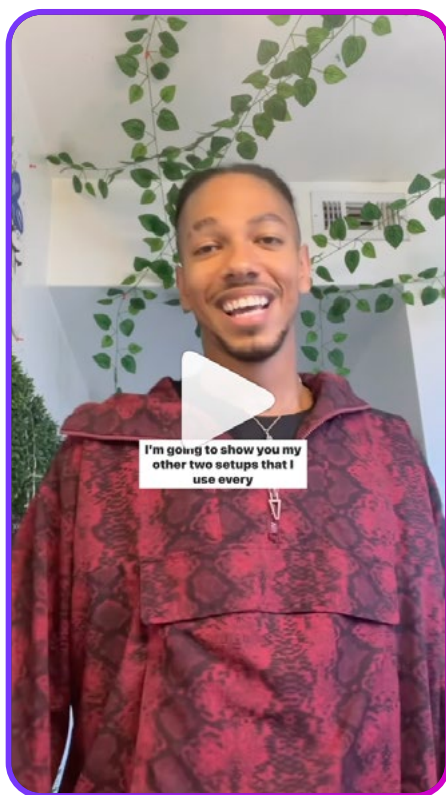


“Brands, authors, artists, fashion – the platforms are all morphing and Reels are a bonus”

KATRINA, 52

2. Attraction

WHAT'S DRIVING THE LOVE OF SFV?



Key trends
driving the
love for short
form video.

6/10

of users say they 'feel
connected to the world'
when watching Reels

Global Consumer Short-Form Video by Factworks
(Meta-commissioned study of 1,400 Australian consumers
of SFV, aged 13-64), Oct - Nov 2022.

SFV is brimming with entertainment, fun, and content tailored to personal interests. Users thrive on the relevance of the videos, the access to communities, and the energy of the content, which feeds into itself over and over again, driving a fresh pulse of culture today.

Top motivations driving viewing behaviour



76%
watch to
have fun

Entertainment

The art of storytelling is evolving

This is the reinvention of the 30-second TV commercial with new rules, a more relaxed viewer, and more creative tools and hooks than ever before to establish connections.



"I want to be entertained as it's important to tell a story that I can relate to somehow"

BELLA, 21

86%
watch to be
entertained

Fun

Don't underestimate the fun factor

There is a deep need for escapism and fun, which is an opportunity for brands wanting to strategically build traction and connection with consumers.



"I mean it's just fun. I think the most trendy things are the most funny, that's what everyone loves. They just want to be cheered up"

MIA, 18

Global Consumer Short-Form Video by Factworks
(Meta-commissioned study of 1,400 Australian consumers
of SFV, aged 13-64), Oct - Nov 2022.

SFV is a unique style of entertainment

Consumers have not only embraced the shorter length of videos but also the unique style of relaxed, playful and raw content that has become the norm across all platforms.

This has driven a deeper sense of connection, access and reliability for users, which they now expect.



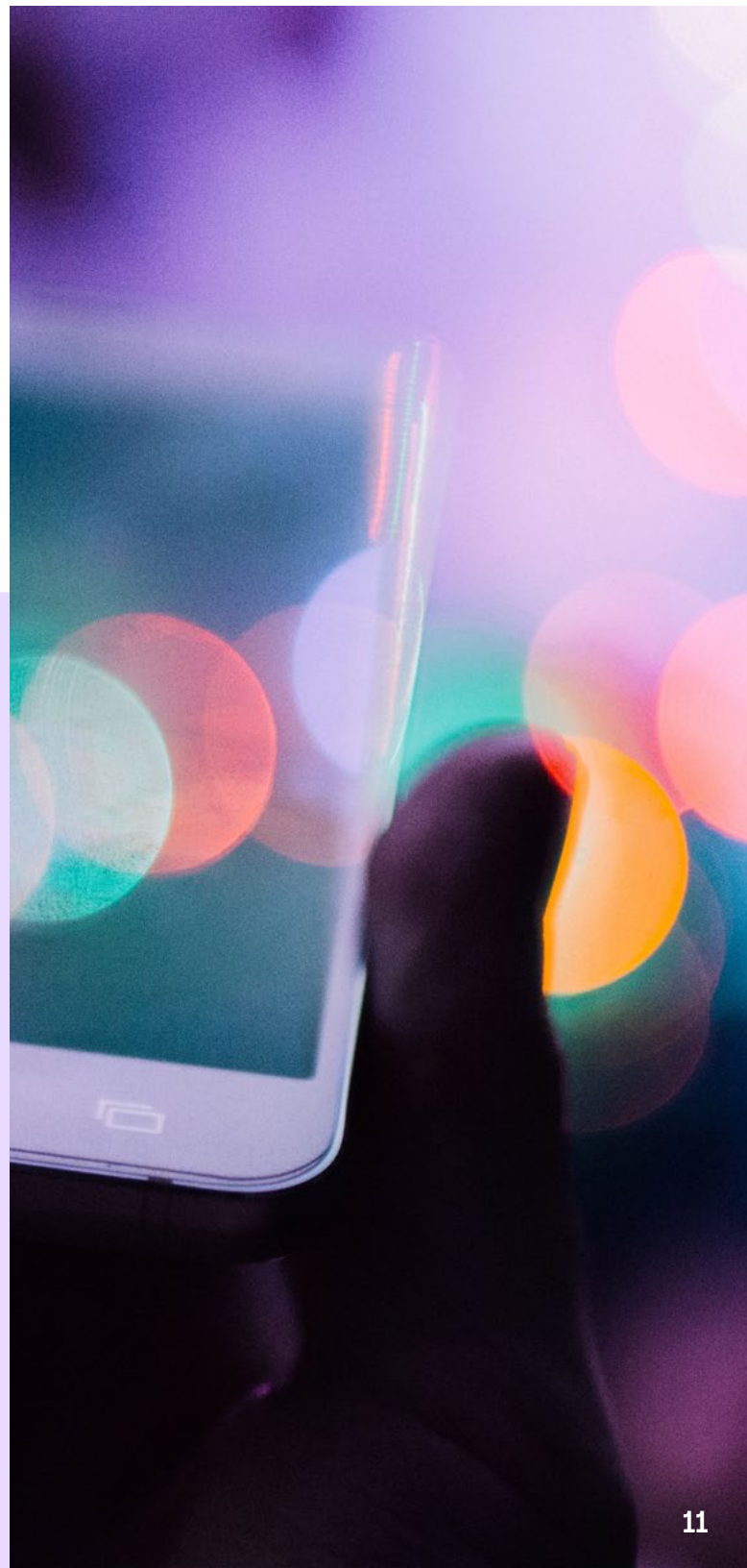
“I’m not a TV show, movie kind of person, I’m too busy, short videos is what I want to watch”

GABBY, 25



“There is a sense of endlessness to the videos, like a movie that never ends”

MATT, 22



1 Highly relatable

Algorithms become adapted to the preferences of the user based on content they engage with.

Brands need to **align with consumers' interests** to establish relevance.

"It's just so adapted to your interests, you can't help to want to watch it"

PAIGE, 18

"You skip through and disregard what you don't want to see and move on quickly compared to YouTube or Netflix. You don't have to put much effort and time in to find something you do generally enjoy"

LUCY, 21

2 Access all areas

SFV takes you behind the scenes and people love that. It's given users a deeper connection to their interests, heroes, brands, people and places.

Build your content **around the brand**, don't just be product centric.

"Video takes you right into the room, you are right there with them and everyone seems so relaxed just letting you see the story behind whatever they are doing or posting, you get a much deeper understanding, I like that content best"

MATT, 22

3 Comments are entertainment

It's a place where comments can be just as entertaining as the videos themselves. A good video not only captures the attention, it starts an action and a conversation with the viewer.

"There are some feeds where the comments can be more insightful or entertaining than the content itself"

JASPER, 19

Brands are encouraged to take note of the **power to engage** through comments.



Brands need to think about their sonic brand/footprint and **use music strategically** - it has the ability to connect multiple generations to your message, which expands reach and engagement.

4 Music is playing a starring role in SFV

Sound plays an integral role in SFV, and consumers are attentive to the choice of music. It's driving music education and fostering connections among different generations, from Gen Z through to Boomers.

Discover more

"A lot of music comes up that I'm like, this is a great song, so I might go on Spotify and add it to my playlist"

MATT, 22

Genre gateway

"If I was on spotify, I wouldn't be caught dead going through country music - but when it's given to me on social media and it's with a video with a nice aesthetic, then I know I'm going to like it"

ALICE, 18

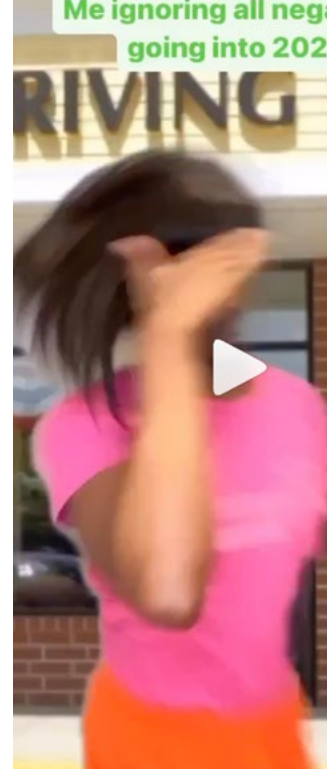
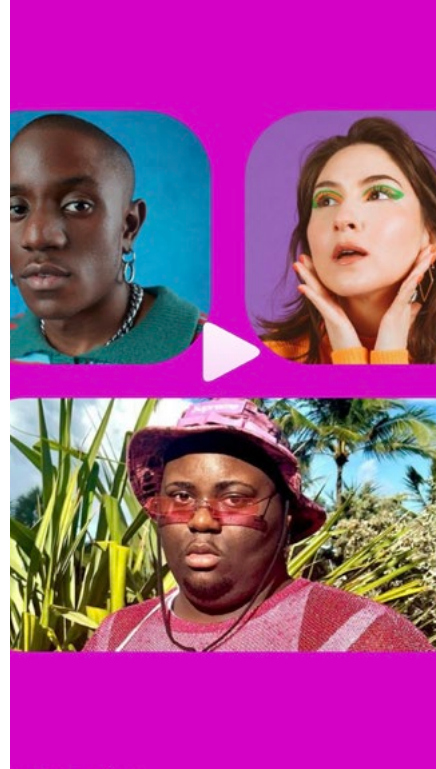
Grabs attention

"I'd say the main reason is audience engagement because of the sounds and the colours. I think that the use of sound is just something extra to stop you from swiping when you go through your feed and it's just photo after photo, then you see a video, you stop and you listen to it. And if you can get people in those first 2-3 seconds that they stop and listen, then it's way more likely that they'll actually go further onto your page and actually look into the business"

STELLA, 18

93%
of Instagram Reels
Video is viewed
with sound on

2. ATTRACTION: WHAT'S DRIVING THE LOVE OF SFV?



5 Authentic and raw

Real honesty

Video was seen as being more natural and honest than still images - this aligns with the underlying trend towards more authentic and relatable content.

"I like raw video, there is merit in it, it feels more authentic than hyper produced video, which I think might decline as it doesn't sit on these platforms as well"

OLIVIA, 32



"For a brand you have to be real and relatable, don't be fake. These days we don't want perfection either"

THEA, 32

Personality plus

You only have to look at the **creators** today who are driving engagement - they understand and exemplify the power of showing personality and sharing the good and the bad.

"Now with short form video it's all about authenticity, it's about being raw and real and showing up as your truest self"

STARR, 28, CREATOR

Learn from the success of some creators - proudly **show your brand's personality** and celebrate your **wins and fails** - it will secure more kudos with the consumer.

Case study

Bella, 21



“When our short form video went viral, we were amazed that the comments were popping off and people wanted to know where the store was, whether the garment was available in their size and whether they could get a job at the store. What started out as a bit of fun ended up creating banter and enquiries from hundreds of people”



Case study

Mia, 18



“I post videos of me creating my art and I speed it up so you can see the process, the techniques I use and how long it takes. I like to make it a fun environment. Art I feel like can be quite scary to people and I like to encourage people. You can just dive in, there’s no right or wrong, you can just have fun with it. I just want to share what I do”



“I’ve noticed that Reels are getting more attention, so the last time I made a video on Reels and it was like the most, I got 52,000 views on my Reel compared to my reposted TikTok video, where I got 200 likes. So I’m definitely gonna start posting Reels more because I’m getting more coverage on it, which is really interesting”

“When I posted my art videos on TikTok, a lot of people were using more slang language; ‘yeah’ ‘slay’, whereas on Instagram it was more like, ‘Oh, great job’ or, like, mum’s friends commenting or people DM’ing me. The comments on insta were a lot more formal, and related to my art”

SFV consumers'

Need states

Your SFV feed is as unique as an individual fingerprint — it mirrors your interests, passions, curiosities and needs.

Inspired

"There's obviously so many different places around the world to surf. So I like watching videos and then I take note of them to eventually tick off the bucket list"

NED, 19

59%

say they feel connected to the world when watching Reels

Connected

"I think a good video connects to you. A good video to me might not be a good video to you. We may like and feel different things. I'm passionate about what makes me happy, like all those little things including food and wedding videos"

MARIAH, 21

64%

say they feel inspired when watching Reels

Everyone's needs and interests are different

57%

say they feel motivated when watching Reels

Relaxed

"I'm looking for quiet and calming things - yeah, just anything calming and creative. For example, it's nice to hear somebody reading a poem or poetry"

MEL, 50

69%

say they feel relaxed when watching Reels

Motivated

"I've cooked a few different meals from what I've seen on Reels and it's encouraged me to go back to yoga and start a little bit more exercise. I do get sent a lot of fashion stuff, so I must say sometimes it has led me to buy something because I've seen it there... I also go to gallery openings and events because I've been sent videos about that too"

KATRINA, 52

The pulse of culture

Short Form Video also offers users a chance to join trends, observe, question and or share norms, beliefs, behaviour and values, which makes it a hotbed for culture and community participation.

6/10

users say they 'feel connected to the world' when watching Reels

1

Fueling trends

"You don't create on TikTok in a vacuum, like you are driven to create on TikTok by the trends you see on TikTok, right? Because most people aren't early adopters, they're part of that main group. So, I think it's a false truth that TikTok is more authentic to culture than perhaps Instagram is"

OLIVIA, 32

2

Melting pot of issues

"Mental health issues potentially drive the content to be more realistic, it's essential to show the good and the bad in videos"

STELLA, 18

3

Powering debate

"I often read the comments on a Reel if I'm not 100% sure what I think about an issue. I like seeing the different perspectives and I might use them later when discussing the same subject with mates and family"

OSCAR, 24

1/5

want to see Reels that are participatory



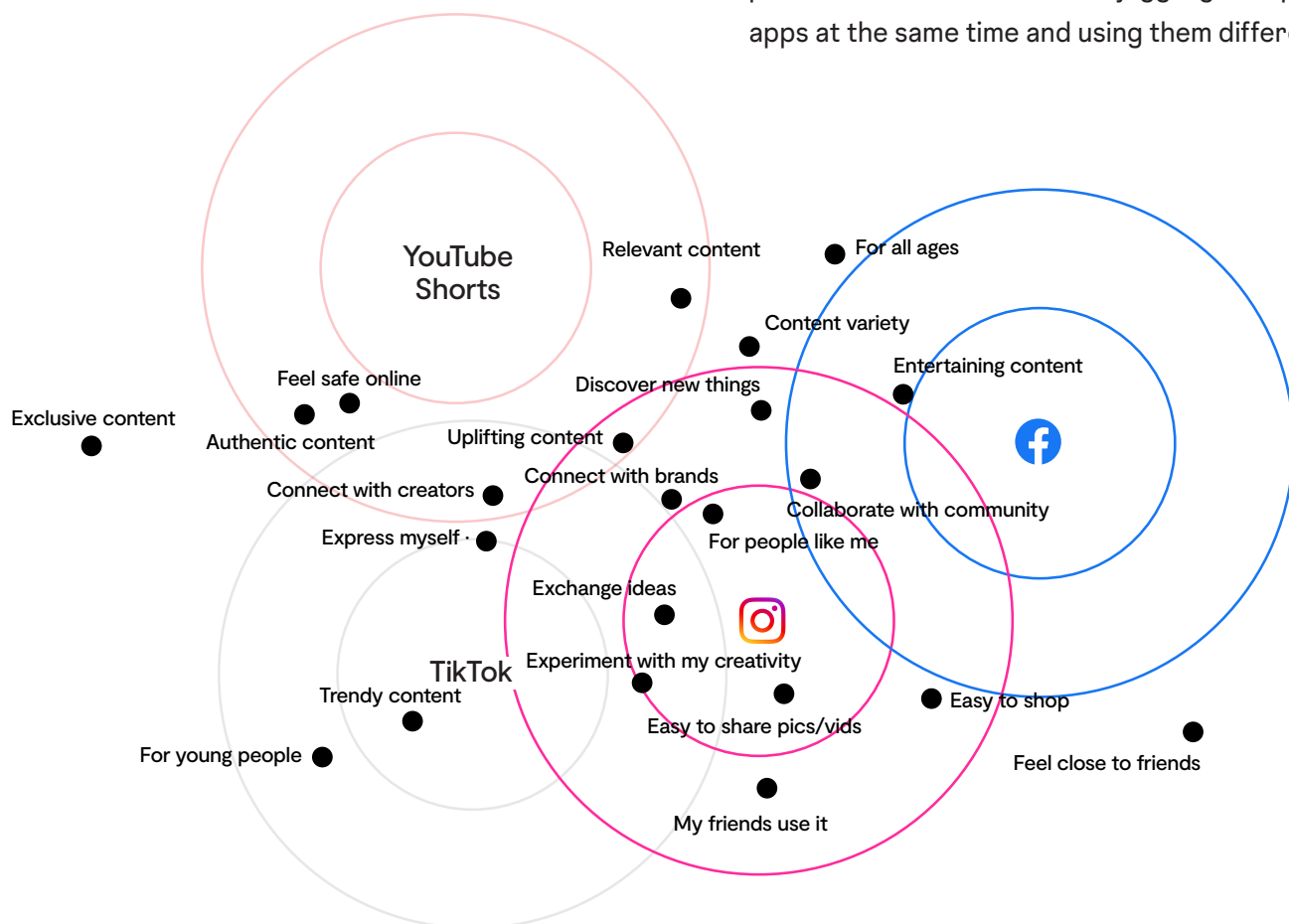
3. Playground

A VIBRANT ECOSYSTEM

Australians of varying generations and backgrounds are attracted to and influenced by the digital ecosystem on a daily, even moment-by-moment basis.

Each platform has a unique USP

SFV in some form is now available across all social platforms and consumers are juggling multiple apps at the same time and using them differently.



Attributes are **clustered and mapped** to platforms that are perceived as most closely aligning with that attribute.

This reveals that Instagram Reels is strongly associated with **facilitating connections** between users and their creativity, friends, community and brands, as well as being easy to shop on.



When content is considered of high value, viewers feel a great sense of satisfaction in sharing their ‘personal playground’ with others.

App usage

Using multiple apps

Participants explained how they manage, gain or shed apps based on major life events, especially as they moved out of school life into study or the workforce.

Apps have personalities too

Participants could easily identify the strengths and purpose of each app and how it fits in with their lives.

Content is fluid

Good SFV content travels across apps.



“I do think social media users enjoy having apps for separate reasons”

MIA, 18



“So for Instagram and TikTok, the reasons that I use each platform differ. So for Instagram, the Reels that will come up are mostly of fashion and catwalk and brands because I use Instagram for that model side of my life. But then TikTok will be more of the stuff that is just boring, random stuff or funny videos and things because that’s what I go to that platform for. So it changes, it’s not the type of video that changes, it’s the content of each video depending on what I use the platform for”

STELLA, 18



“I don’t feel the need to have TikTok, I feel like all the good stuff ends up on Instagram as Reels anyway”

RACHEL, 21

4. Connection

THE ROLE OF REELS



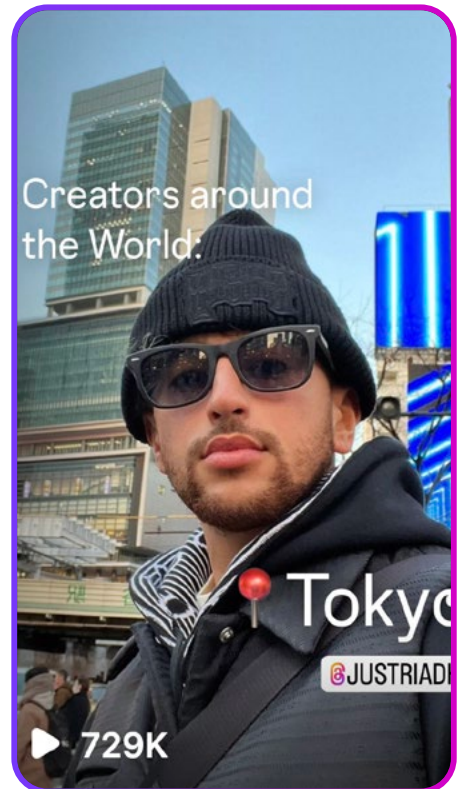
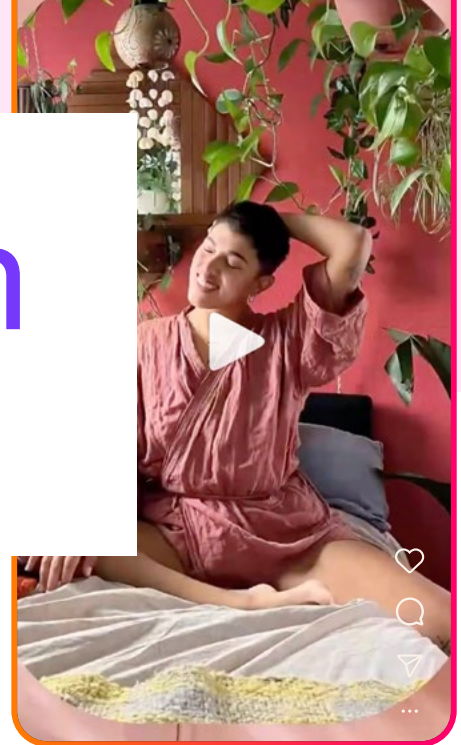
Reels helps
people **connect**

Within the rich ecosystem of SFV, Instagram Reels has a uniquely defined role and offers users a strong proposition, which consumers relate to.



“I don’t think of TikTok as a community platform. You do it independently in your own time, and while you might make TikTok’s with your friends, you are scrolling solo. Whereas with Instagram, I feel like it’s more of a community”

MARIAH, 21



93%
of people surveyed
have shared Reels
with friends or family

Global Consumer Short-Form Video by Factworks
(Meta-commissioned study of 1,400 Australian consumers
of SFV, aged 13-64), Oct - Nov 2022.

Connecting digital life with real life

Instagram is a place where online communities intersect with real life communities. This intimacy and familiarity between digital life and real life had participants claiming their Instagram usage was more mindful than other apps.

Key benefits

- A place to share online content to support and boost real life bonds.
- A platform with higher accountability and trust to content consumed and shared.
- A place that is seen as respected and a loyal source of information.

1

Reels connects friends

Participants of all ages were very aware that their real life friendships sat on the Instagram platform. It was consistently mentioned that they would head to Instagram very deliberately to see what their friends were up to, this included those who were GenZ's.

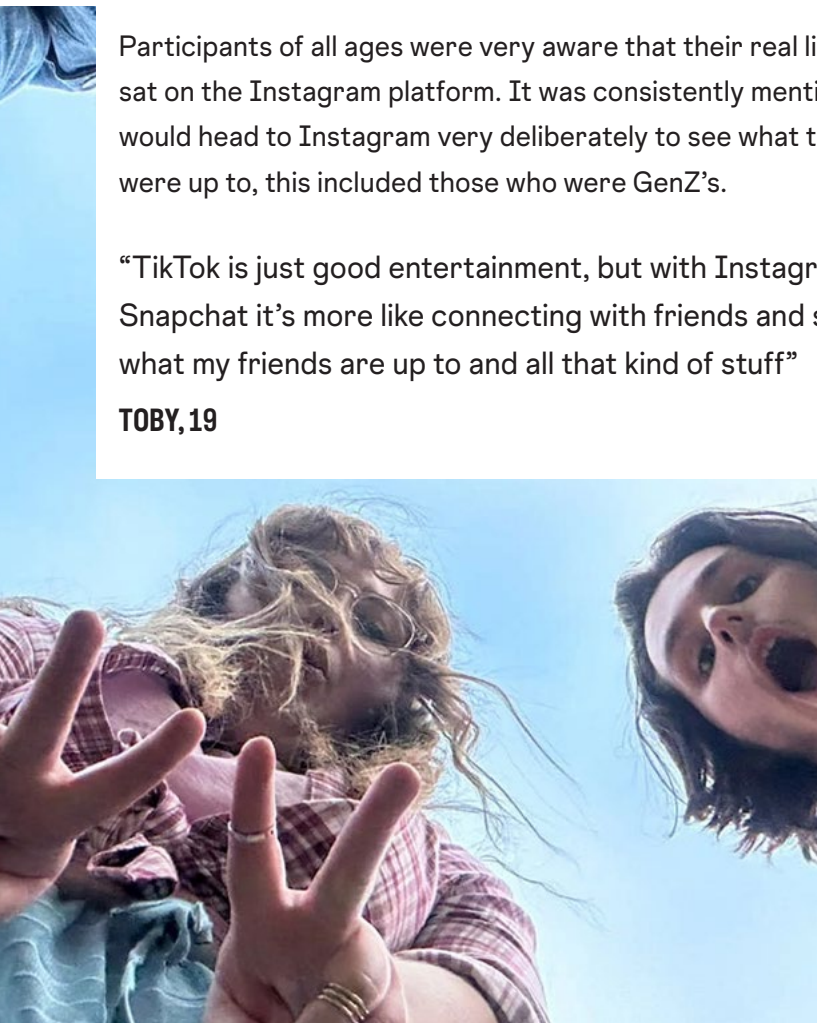
"TikTok is just good entertainment, but with Instagram and Snapchat it's more like connecting with friends and seeing what my friends are up to and all that kind of stuff"

TOBY, 19



"I save Reels and I do share if I think that one of my close friends will find it funny. It's nice to have my friends send me stuff that they think I'd find funny because it goes both ways – especially me and my best friend as we're sending stuff to each other every day"

TOMMY, 20



2

Reels connects all the generations

The research showed that Instagram stood out as the master platform for multiple generations to use and connect. While Instagram was the original platform for Millennials and Gen X, all GenZ we spoke with also had Instagram.

Research indicated that Instagram is THE platform for people to check in on family and friends and consequently the platform is marvellously intergenerational.

Awareness + usage

Both awareness and usage of Reels in the past 7 days was similar across the generations.

78%

have used Reels in the last 7 days

Reels	Awareness aided	Used past 7 days
Total	86%	78%
Gen Z	87%	76%
Millennials	87%	79%
Gen X	84%	80%

3

Reels connects communities

Research revealed that Instagram wasn't seen solely as a place to connect with friends and family. It was also widely recognised as a place to explore, discover, connect and collaborate with like-minded people with shared interests.

"Sometimes I share a Reel of me playing guitar and I'm always surprised how a friend of a friend or someone I've never met may then tag me on a video of them playing the same song. It's a great feeling that my Reel can make people who enjoy guitar feel more connected as we're all enjoying the same experiences"

NED, 19



A trusted source

Instagram appears to have fostered more 'trust' and is seen as a 'respected' and 'loyal' source.

"I can't even put into words exactly why I trust Instagram more, but the stories and then the posts and the Reels and the insight into people's lives, there's just more of a way to connect and to represent who you are, or what brand you are. TikTok seems more like a lot of people's random thoughts just blasted on the internet. I don't think people think as much before posting on TikTok as they do on Instagram, which is why I like Instagram. I only post on Instagram because when I go on Instagram, I'm intending to look at what people are saying and what people are posting, especially friends, but on TikTok you're just going there to see, you're not trying to connect to other people"

STELLA, 18



Reels boosts discovery



Curiosity creates opportunity, empathy and growth and Reels serves people with a natural curiosity and a desire to discover new things. The opportunity for discovery where the algorithm presented new content was important to people.

Participants reported that Instagram provides **more room for discovery** because TikTok is too highly targeted.

Beyond interests

“Instagram knows me so well, I get shown videos that interest me, but about 20% is more random”

LUCY, 21

1/4

agreed that Reels
allows them to discover
new people and things

Global Consumer Short-Form Video by Factworks
(Meta-commissioned study of 1,400 Australian consumers
of SFV, aged 13-64), Oct - Nov 2022.

Connected content

“The algorithm on Reels is more connected to my friends interests than it would be on TikTok. I’m not really interested in tattoos or piercings, I mean I don’t mind them, but I wouldn’t search for it, but one of my besties is a tattoo artist and I always see videos about that and I send them to her”

EMILY, 28



5. Opportunity

THE POWER OF REELS FOR ADVERTISERS

Reels is the **gateway** to the Instagram ecosystem

Reels are not used in isolation. Users are leveraging the deeper information available by following videos into user profiles, posts, stories, and directly into transaction links.



You have to try my no-cook summer pasta because it's mamma

Reels acts as a lure to your other content and profile pages. **Be ready to engage** with them deeper across the platform, from profile pages, stories and of course transactions - **be mindful of the continuity** of the brand experience.



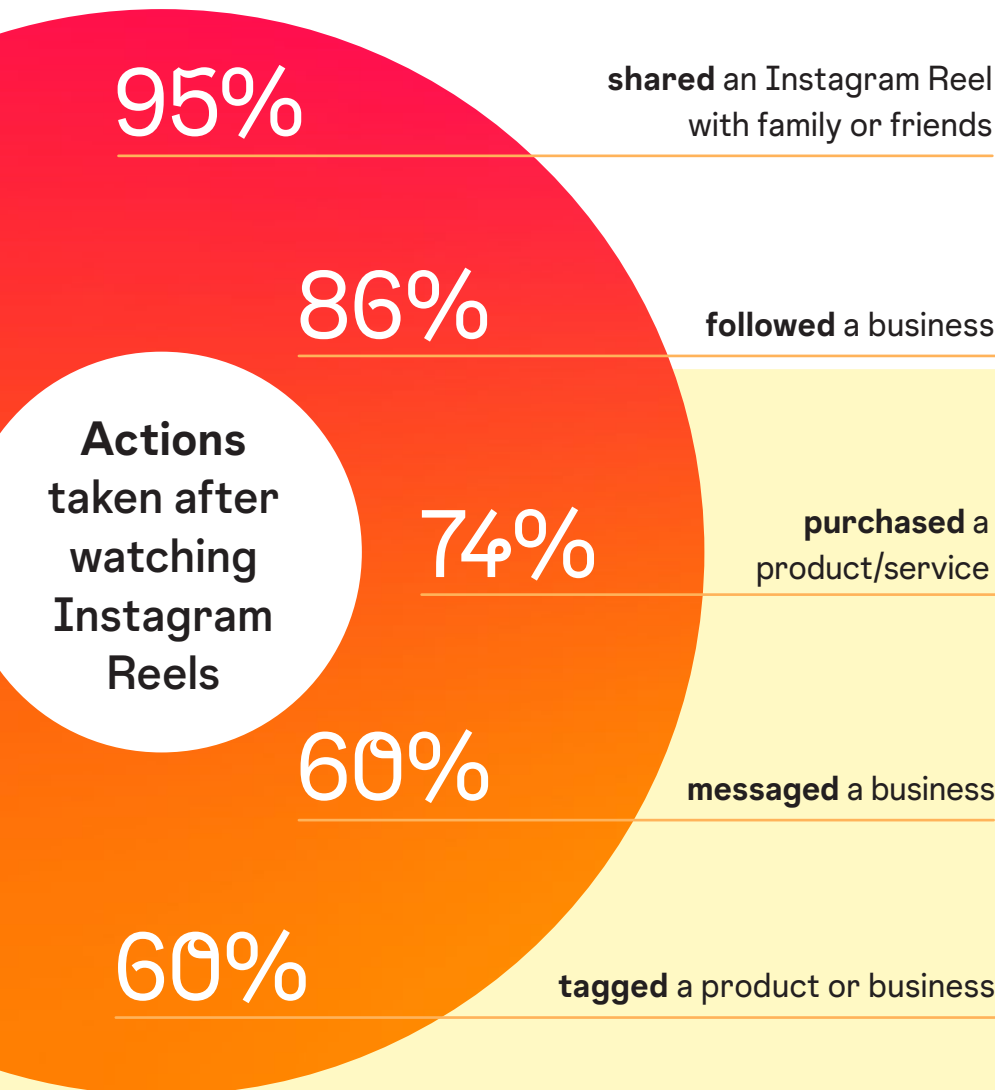
“If I find a Reel, for example a food blogger recommending a nice cafe or something, then I’ll go into their account and see what other recommendations they’ve had for different places and if I see they’ve posted lots of videos, I might go through and watch those if I like the content creator”

RACHEL, 21

Reels **inspire action**

Consumers are actively engaging with brands via Reels. There is an inherent opportunity to stimulate an action from the viewer and encourage them to amplify and share content within their own communities.

Reels is an **active environment** –we know people are responsive – give them something to act on.




+8pp more than TikTok
+17pp more than YouTube Shorts

+4pp more than TikTok
+9pp more than YouTube Shorts

Reels **build brands**

Today consumers are still expecting brands to tell their stories, however they respond best to the informal approach.

Focus needs to be on brand fit and brand building, as well as sales. Use the whole Instagram ecosystem to tell your story, drive brand awareness, loyalty and conversion. Show your personality and have some fun.



“A clothing brand who does video well is the Flatiron label. The videos and lighting are just really beautiful. So, the whole thing is really artistic - it’s not a hard sell and it’s not loud and crass and noisy, it’s just very refined and elegant. It needs to be done in such a clever, subtle way. I don’t like it when people have the video right up to their face as I prefer a soft touch when you actually don’t even know that you’re being sold something”

MEL, 50

“Honestly a lot of smaller businesses make better content because they tend to be a little bit more authentic. The bigger brands just try and jump on the trends and then it kind of comes off as a bit inauthentic... It’s important for them to not underestimate the power of micro-influencers too”

SHAE, 21

“Heaven by Marc Jacobs are doing really well in capitalising on all of the not so niche influencers and celebrities that are really popular within the scene at the moment. It’s a bit surprising when a brand really does well to use them. I like that they recognise what’s going on with our generation... that’s a good way to do it”

TOBY, 19



“The best collab I’ve seen was between Quicksilver and the Netflix series, Stranger Things. The clothes featured on a Stranger Things episode and hours later there was a one-off fashion drop where you could buy the clothes worn in the show. I wasn’t fast enough to get it as it sold out in record time. It was clever.”

NED, 19

Collaborate

Build brands **around** **communities** of interests.



6. Tips

CONSUMER ADVICE FOR BRANDS

Top advice from consumers

1. **Entertain** me - being even a little bit funny helps
2. Be your **authentic** self - take learnings from creators
3. Take me **behind the scenes** - talk to me like your friend, and show me something new
4. **Don't over produce** - it makes you more relatable
5. **Get involved** in my interests - deepen our connection, join my community
6. **Combine** interest groups - consider strategic brand alignments
7. Put effort into **the music** - it can help with cut though and engagement
8. **Be trendy** - but not too trendy, just be yourself
9. Give it a go!



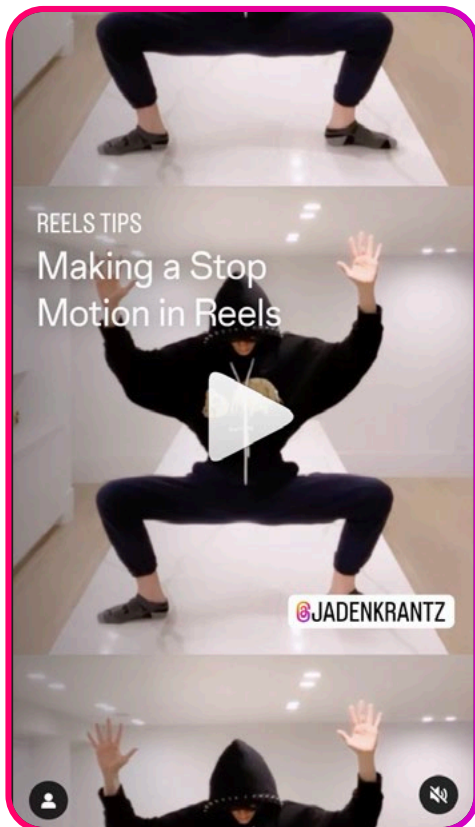
7. Takeouts

SUMMARY

Reels inspire **action**

Reels help people **connect**

Reels get brands
closer to consumers



Thank you



from
Meta