



State of Attention

A year in review

Professor Karen Nelson-Field
May 2022

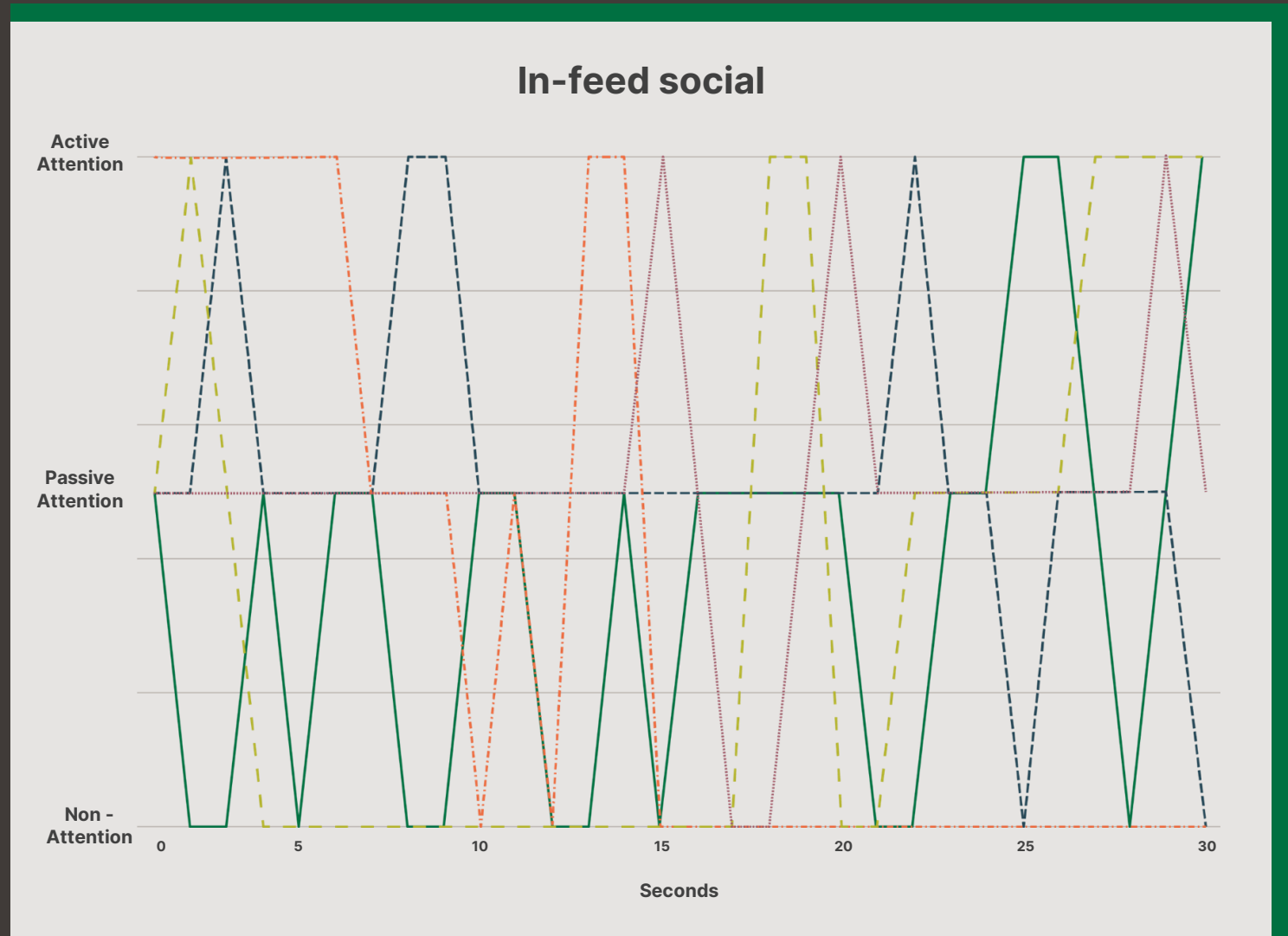
**We live in a constant
state of zombie. So
attention to ads is not
sustained and certainly
not undivided.**



It's more like this.

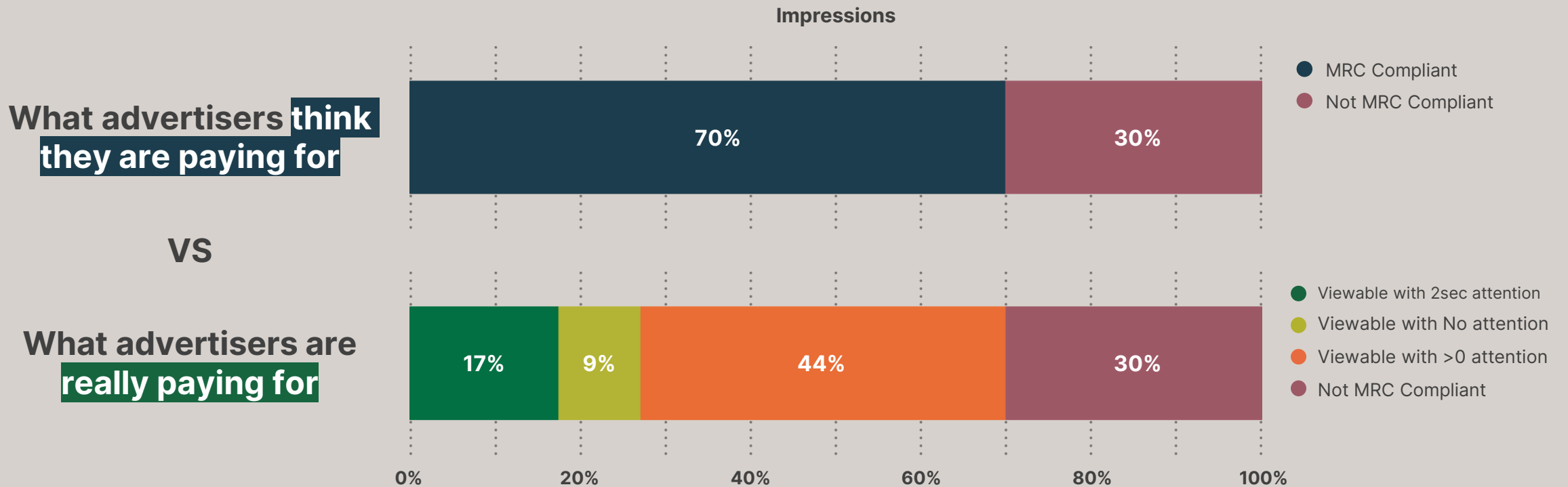
We switch in and out of focus when we consume media.

This switching is distraction away from watching ads.



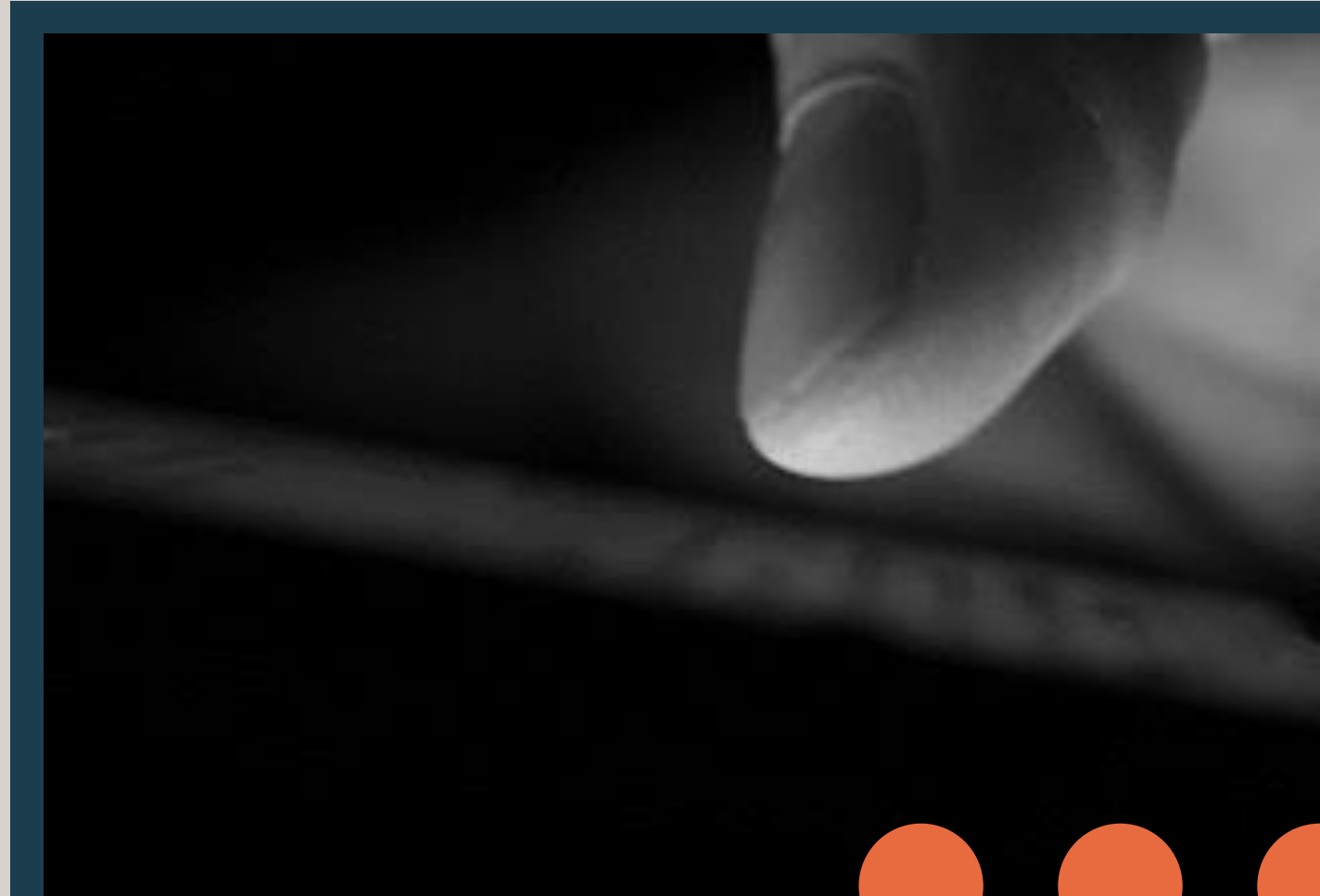
Our first problem. The gap between 'viewable' and 'viewable with attention' is vast.

Around 75% of online ads that you have paid for, against the currency you trust, don't deliver the value you believe they do.



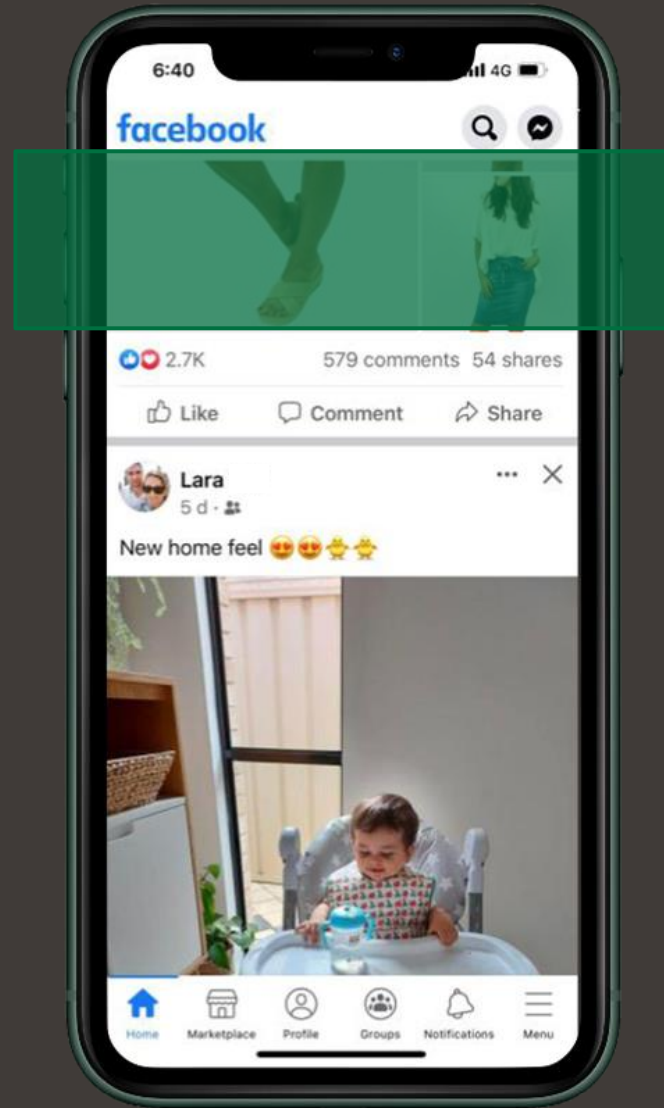
Platform functionality is a large contributor of distraction including...

Ability to Scroll



General Page Clutter

Friends and family are
more interesting

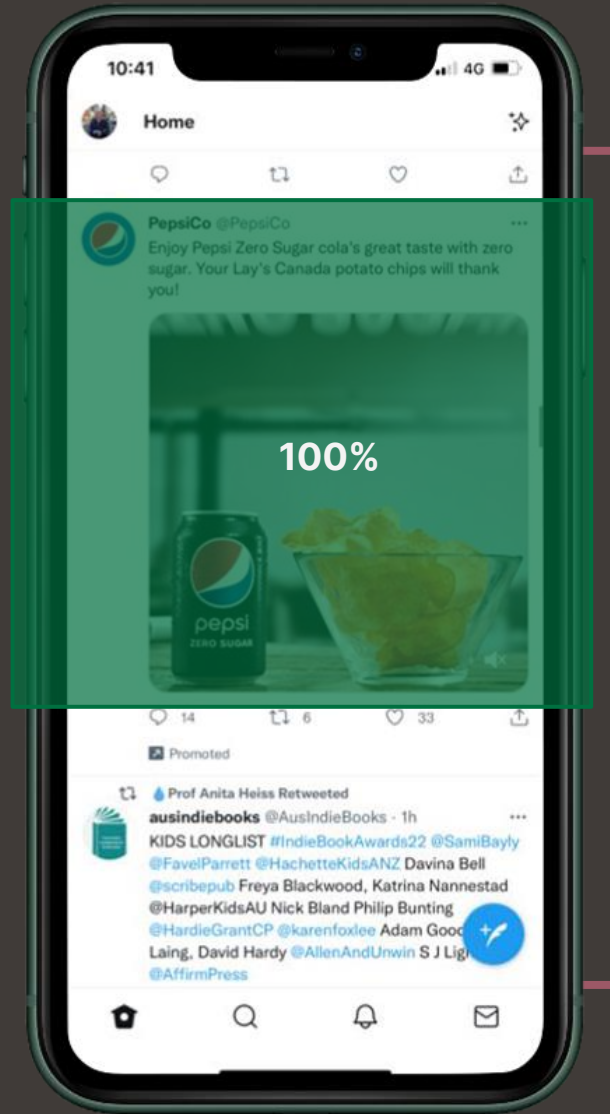


Total Ad Visibility



Screen Coverage

= proportion of screen the ad covers



60%

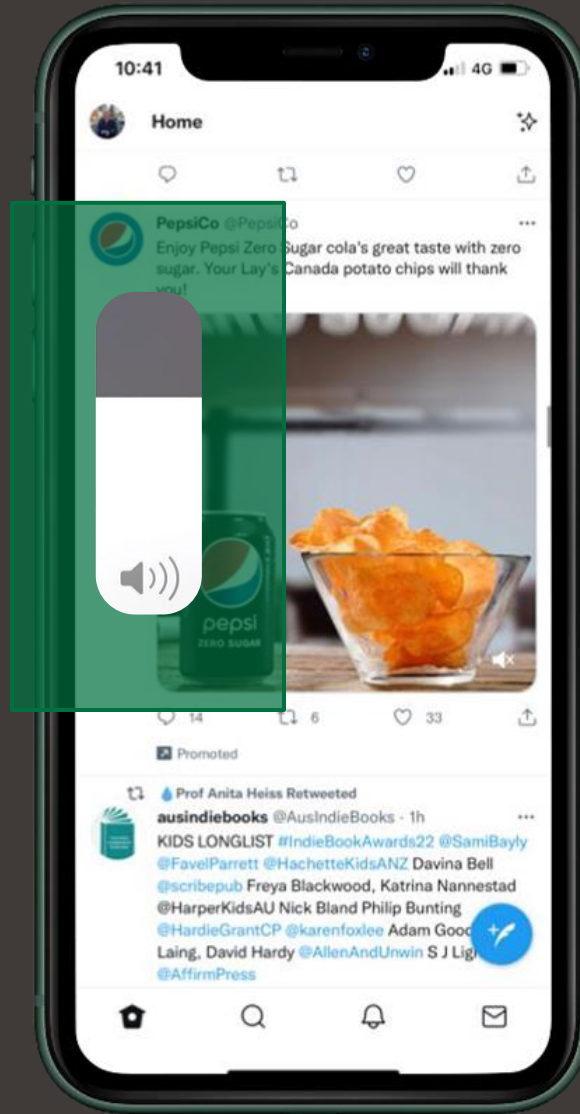


Ad Size/Pixels

= proportion of ad on screen

Sound

on/off default



A black and white photograph of a herd of zebras gathered around a watering hole. The zebras are in the foreground and middle ground, with their heads lowered to drink from the water. The background is slightly blurred, showing more zebras and the natural environment. The overall tone is somber due to the monochrome palette.

**This would all be manageable if
each platform/format behaved the
same - but they don't.**

Sound

Sound differs significantly by platform

	Attention Seconds Ranking	% Sound On
Platform A	Highest	82%
Platform B	2nd	79%
Platform C	3rd	35%
Platform D	4th	18%
Platform E	Lowest	5%



The viewability gap.

Platforms and formats display different levels of:

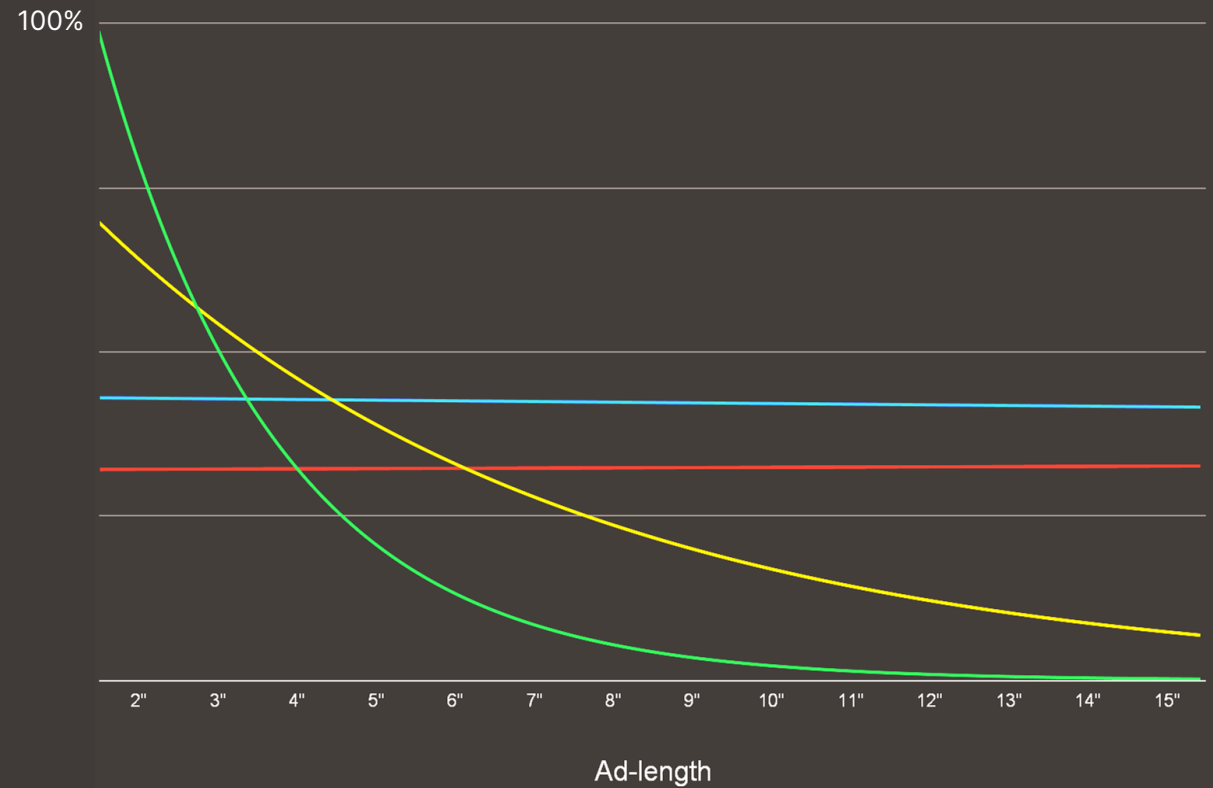
- switching
- attention
- results.



**Platforms/formats
display different levels
of viewing decay.**

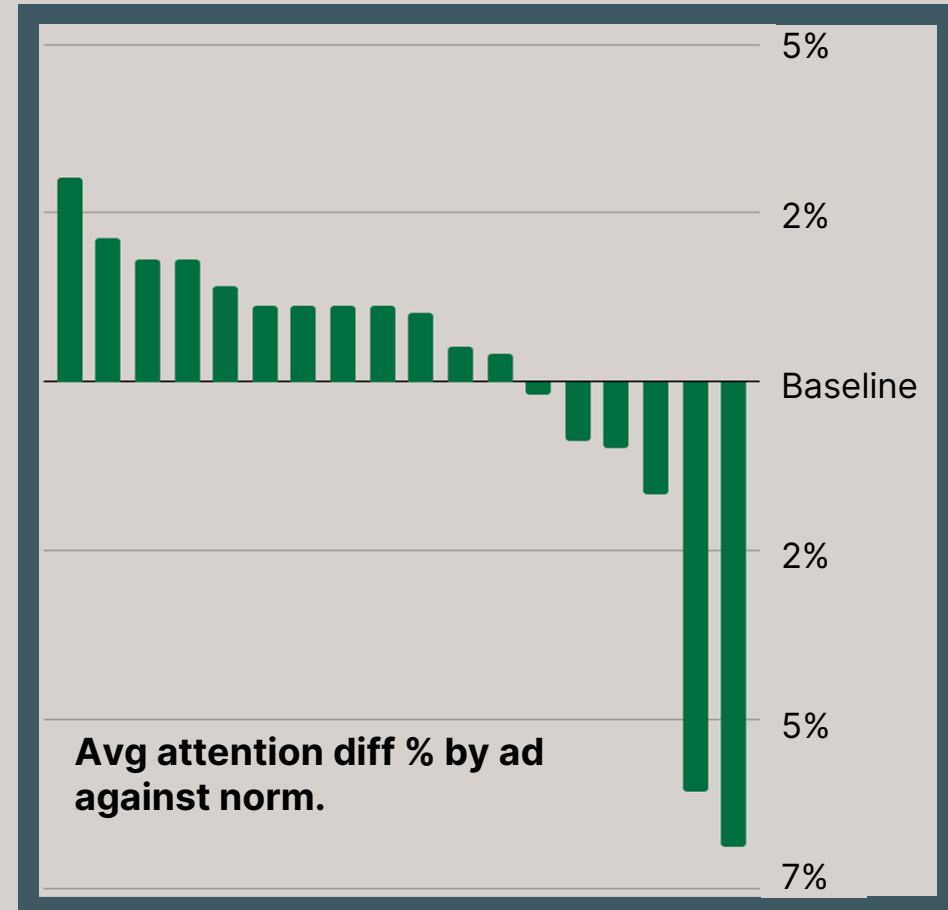
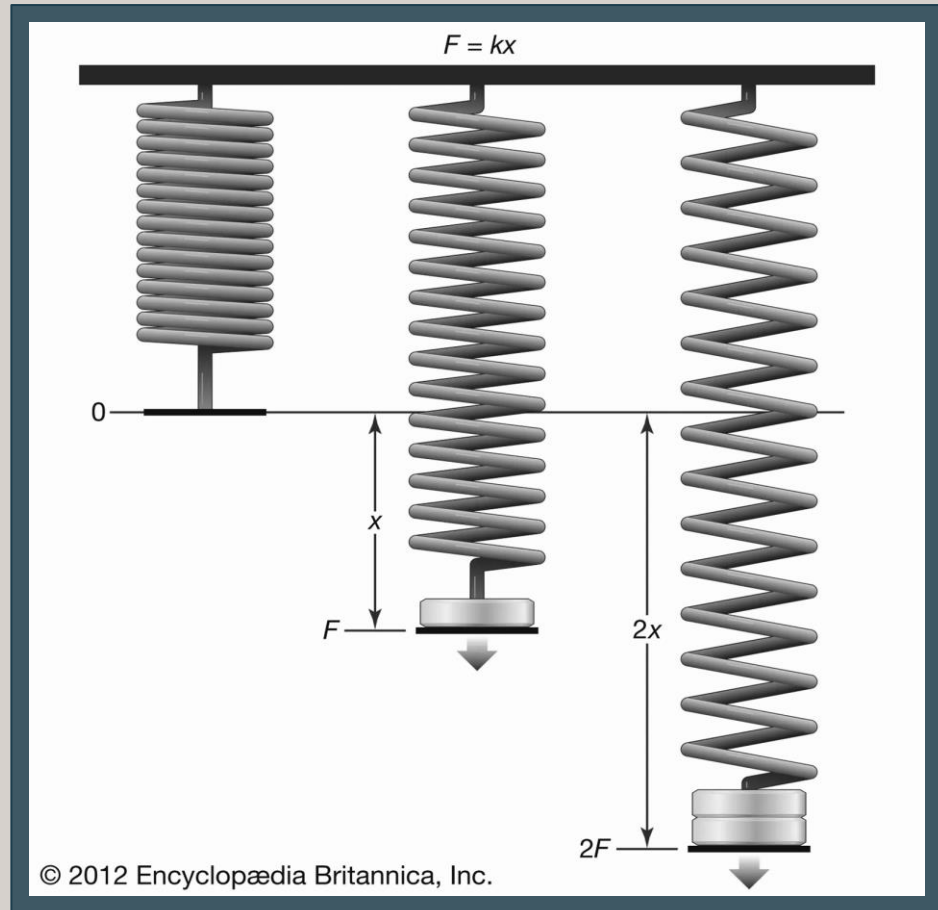
**Which means some platforms
get lots of attention early,
others don't.**

Platform Percentage of Views looking directly at Advertising



And each has its own attention range (attention elasticity)

Double Jeopardy Pattern: Lower attention platforms also have smaller attention elasticity limits.



This impacts creative opportunity

Your creative has little chance to perform beyond the norm.

	Platform A	Platform B	Platform C	Platform D	Avg Attention Seconds
Brand A	7.0	5.5	3.3	2.9	4.7
Brand B	7.2	4.5	3.4	2.3	4.4
Brand C	6.5	5.1	2.9	2.8	4.3
Brand D	6.9	3.7	3.3	3.2	4.3
Brand E	6.4	4.1	3.2	2.7	4.1
Brand F	5.5	4.8	3.4	2.4	4.0
Brand G	5.8	3.8	3.1	2.7	3.9
Brand H	5.9	4.3	2.7	2.5	3.9
Brand I	6.0	3.9	2.8	2.4	3.8
Brand J	6.1	3.8	2.5	2.2	3.7
Brand K	5.4	3.9	2.3	2.5	3.5
Brand L	4.6	4.3	2.1	2.4	3.4
Brand M	5.5	2.8	2.5	2.3	3.3

The same creative performs worse/better in line with overall platform attention performance.

Media placement dominates creative. If creative was the dominant force of attention, creative would perform equally across all platforms, but it doesn't.

Platform Attention performance: Best → to → Worst

**It also undermines the
relativity of a digital
impression.**

**And it's not just the obvious, any
measurement system, model,
methodology or concept that relies
on equitable impressions will fail.**

Inc. market mix modelling/econometrics, creative
strategy, budgeting/SOV analysis.

**Lower attention platforms
drive less mental availability
for you and
disproportionately more
mental availability for your
competitor.**



**Inward facing
device metadata
tells you little
about
human behaviour.**

Busting Myths about:

- Scroll speed
- Ad length
- Time on screen



The evolution of viewability to outward facing attention measurement.



1

Viewability V1
(verified OTS)



2

Viewability V2
(Assumed advanced human behaviours)



3

Attention Proxies
(Modelled attention, limited human training data)



4

Continuous Human Attention
(Not modelled)



TV attention using small in home cameras



TRANS: X3.37,Y13.71,Z131.28
ROT: X-175.57,Y0.04,Z-14.19
VEC: X2.44,Y0.77,Z-9.67,
INTERSECT: X25.76,Y3.49,Z0.00,

NO: ONE PERSON
ATTENTION LEVEL: ACTIVE
GENDER: MALE
AGE: ADULT
SECOND SCREENING: NO
CO-VIEWING: YES
TRANS: X3.37,Y13.71,Z131.28
ROT: X-175.57,Y0.04,Z-14.19
VEC: X2.44,Y0.77,Z-9.67,
INTERSECT: X25.76,Y3.49,Z0.00,

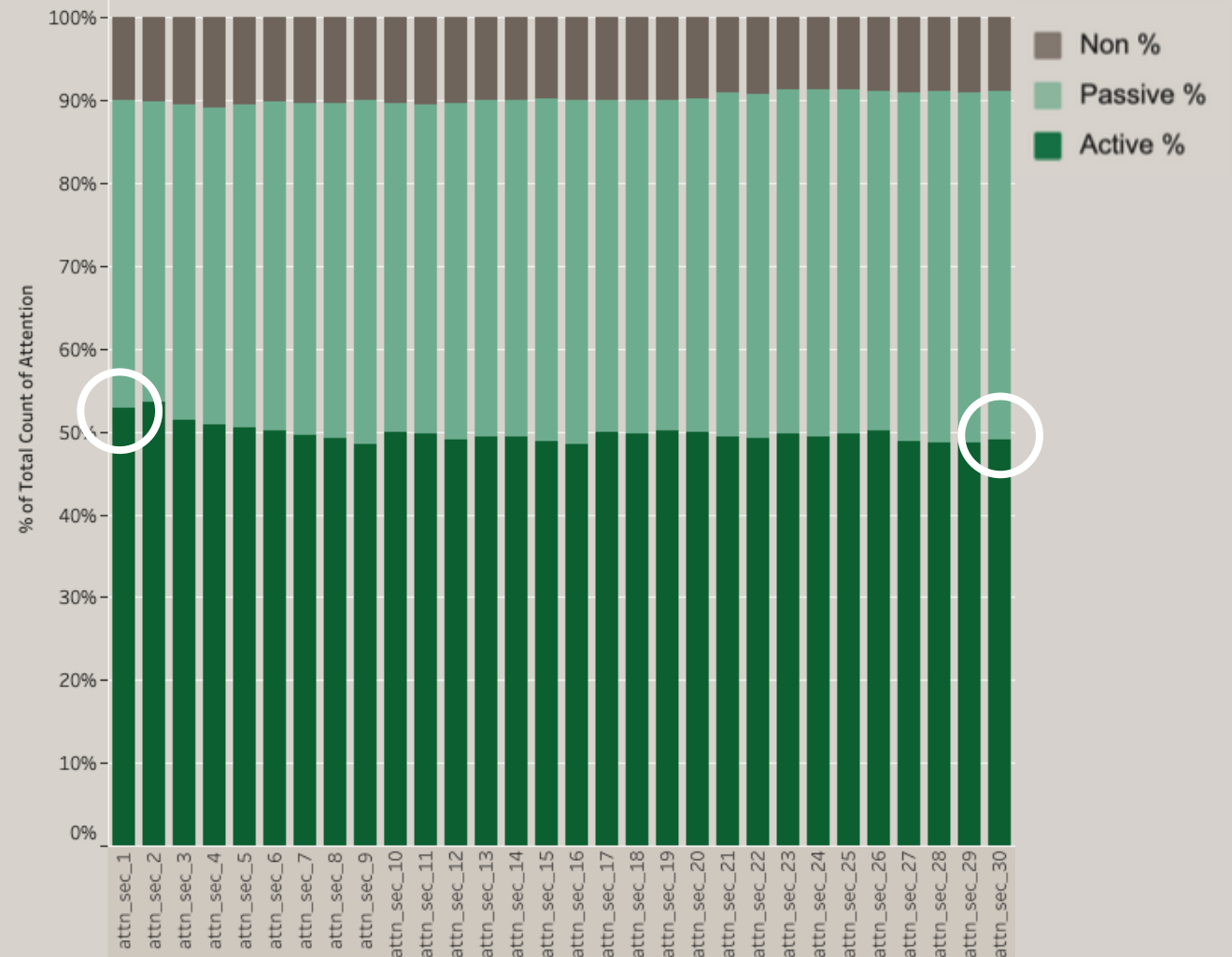
NO: ONE PERSON
ATTENTION LEVEL: PASSIVE
GENDER: FEMALE
AGE: YOUNG ADULT
SECOND SCREENING: NO
CO-VIEWING: YES
TRANS: X3.37,Y13.71,Z131.28
ROT: X-175.57,Y0.04,Z-14.19
VEC: X2.44,Y0.77,Z-9.67,
INTERSECT: X25.76,Y3.49,Z0.00,

NO: ONE PERSON
ATTENTION LEVEL: PASSIVE
GENDER: MALE
AGE: ADULT
SECOND SCREENING: YES
CO-VIEWING: YES
TRANS: X3.37,Y13.71,Z131.28
ROT: X-175.57,Y0.04,Z-14.19
VEC: X2.44,Y0.77,Z-9.67,
INTERSECT: X25.76,Y3.49,Z0.00,

NO: ONE PERSON
ATTENTION LEVEL: PASSIVE
GENDER: MALE
AGE: ADULT
SECOND SCREENING: YES
CO-VIEWING: YES
TRANS: X3.37,Y13.71,Z131.28
ROT: X-175.57,Y0.04,Z-14.19
VEC: X2.44,Y0.77,Z-9.67,
INTERSECT: X25.76,Y3.49,Z0.00,

Shows us that attention distribution is **different on TV**

The proportion of people watching the first second, is almost the same as the last second.



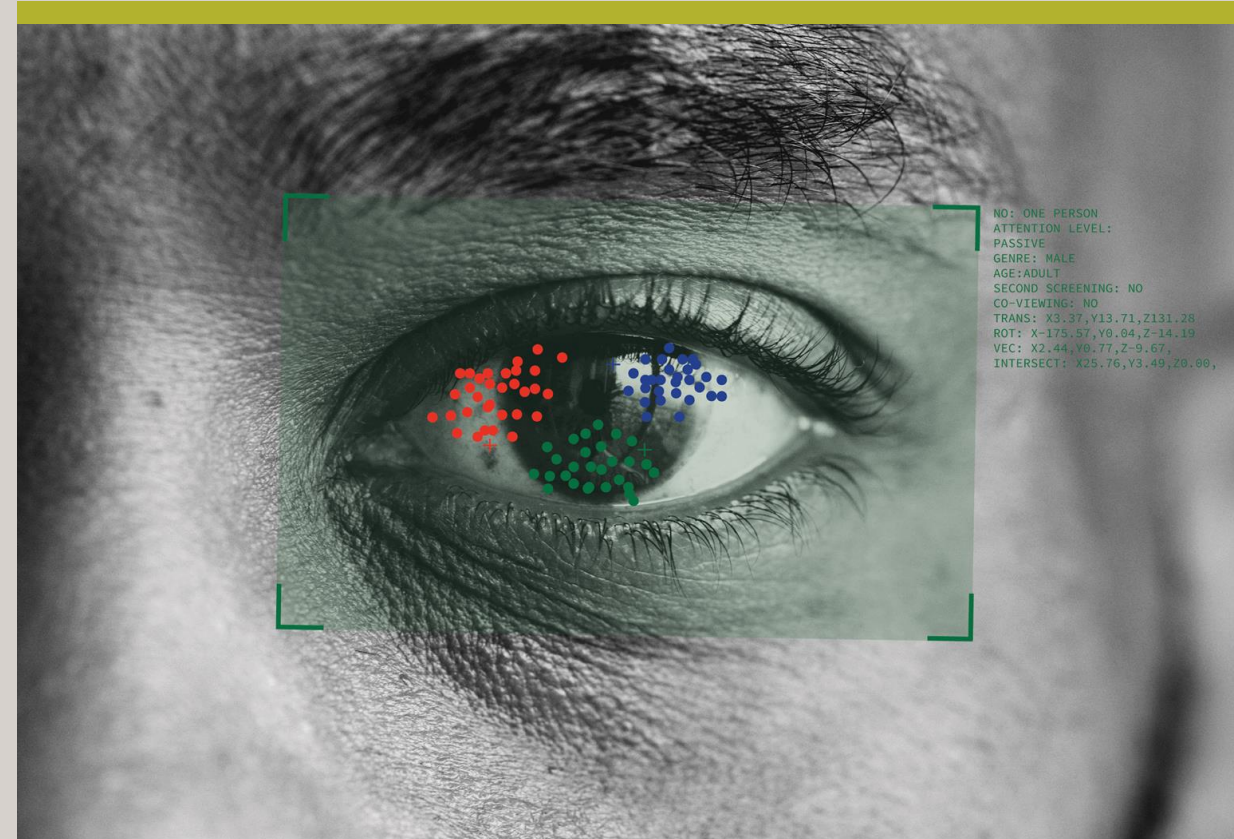
Putting longer ads on scrollable online platforms doesn't, by default, bestow more attention, it just gives you more wastage. (meaning longer ads don't give you more active attention).

This is completely different to TV. Putting longer ads on TV does deliver commensurate active attention. This is directly related to the non-distracting nature of the platform.

**Individual level data
teaches us about the
complicated interplay
between passive and active
attention on all platforms**

We see systematic viewing clusters - that will be the backbone of prediction.

Each platform/format has a different attention shape profile, this is why 3 seconds on one platform can drive different outcomes than 3 seconds on another.



We have recently added a cinema attention model.

Cinema distribution is flatter, like TV.





Your Local
Mortgage Experts



FIDELITY BANK

LionBank.com • (888) 343-LION (5466)



6316M

E W

on your
hours.
Open

OPEN
CALL

CLEANERS
LAUNDRY
RESIDENCE

CE
WARRANTY



The opportunity to see an ad,
is clearly important.

Outward facing measurement provides
clarity on whether a human is **actually**
watching.

—
Understand how the flow on effects of inequitable impressions might impact your business.

—
Procurement often holds the cards and must be part of the change. Help them to come to terms with the need to pay more for attention, when for the most part their remit is cost reduction.

—
Talk to your creative teams about how they might stretch attention elasticity.

—
Bad metrics bring confusion & hesitancy for change, be fussy about proxies.

—
Understand how different platforms perform and understand how this fits your long and short-term objectives.

—
Think about how new measurement impacts media planning and buying.

Big Takeouts