Attention and video measurement

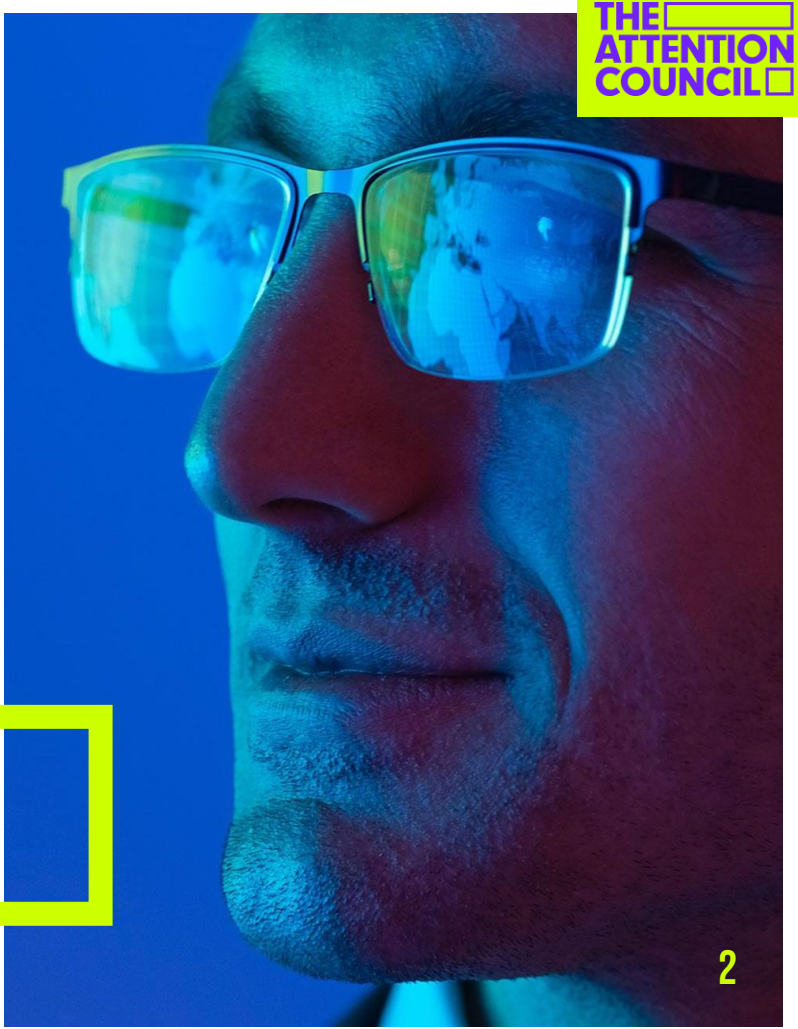
THE ATTENTION COUNCIL

Association of AV Media

Andy Brown
28th March 2023

TODAYS' AGENDA

- What is The Attention Council (TAC)?
- Why do we measure attention?
- How do we measure attention?
- State of the nation for TV (featuring VOD)
- Implications for TV industry



What is The Attention Council?

- A not-for-profit multi stakeholder membership group
- Ambition to drive wider usage of attention metrics in marketing (across media, creative and user experience)
- Sharing best practice and education of the market
- Quality standards
- Maintain links with academic research

Membership growing in TV

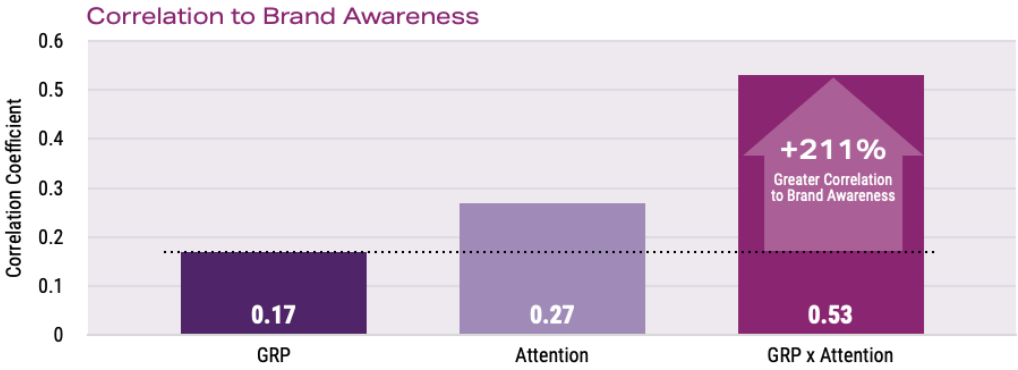
- Original members were research vendors e.g. Adelaide, Amplified, Glassview
- Agencies such as Publicis, IPG, Omincom etc.
- Digital vendors such as Snap, Teads
- And now TV is moving from resistance to embrace ☺

"THE LINK BETWEEN ATTENTION METRICS AND OUTCOMES"

- Aggregated over 50 case studies
- Different vendors, outcome metrics, methodologies and countries

CASE STUDY #1: QSR

A Marketing Mix Model (MMM) analysis for a restaurant revealed that optimizing for GRPs alone is insufficient. The study found that TV attention is highly correlated to brand awareness.



+59%

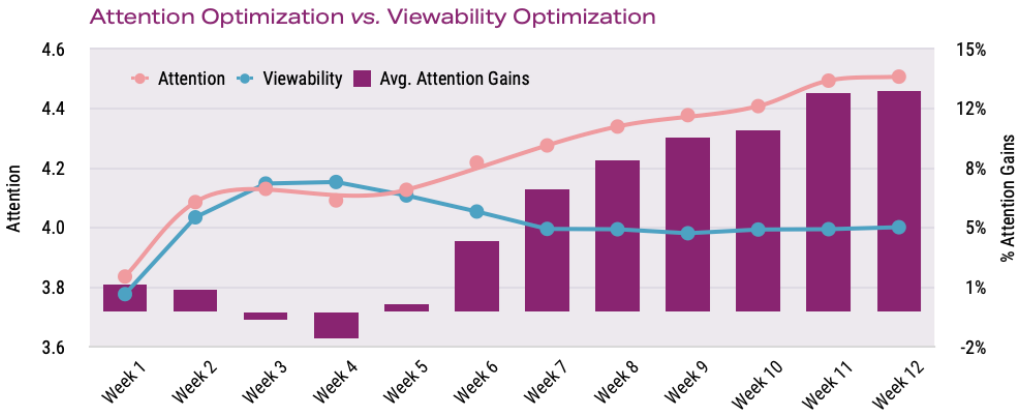
Attention-optimized media was 59% more correlated to brand awareness than GRP-optimized media

+211%

Optimizing to both GRPs and attention resulted in 211% greater correlation to brand awareness

CASE STUDY #2: MEDIA & TECH

A leader in the tech space wanted to compare attention and viewability as optimization techniques to drive brand lift.



+6%

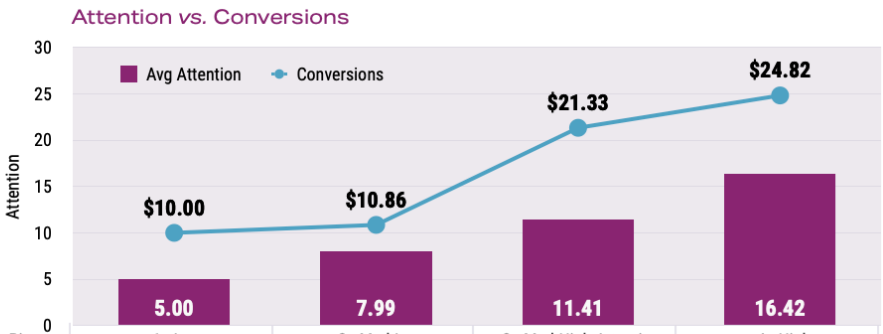
The attention-optimized group tracked 6% higher familiarity levels than the viewability-optimized group

+31%

Attention optimizations also led to 12.8% higher average attention and proved 31% more cost-efficient

CASE STUDY #3: FINANCIAL SERVICES

For a multinational financial services company with lower funnel outcomes, research indicated a very strong positive correlation between attention and lower funnel action per impression.



Attention Bin (Quartile)	1 - Low Attention Bin	2 - Med-Low Attention Bin	3 - Med-High Attention Bin	4 - High Attention Bin
Number of Observations	130	130	130	131

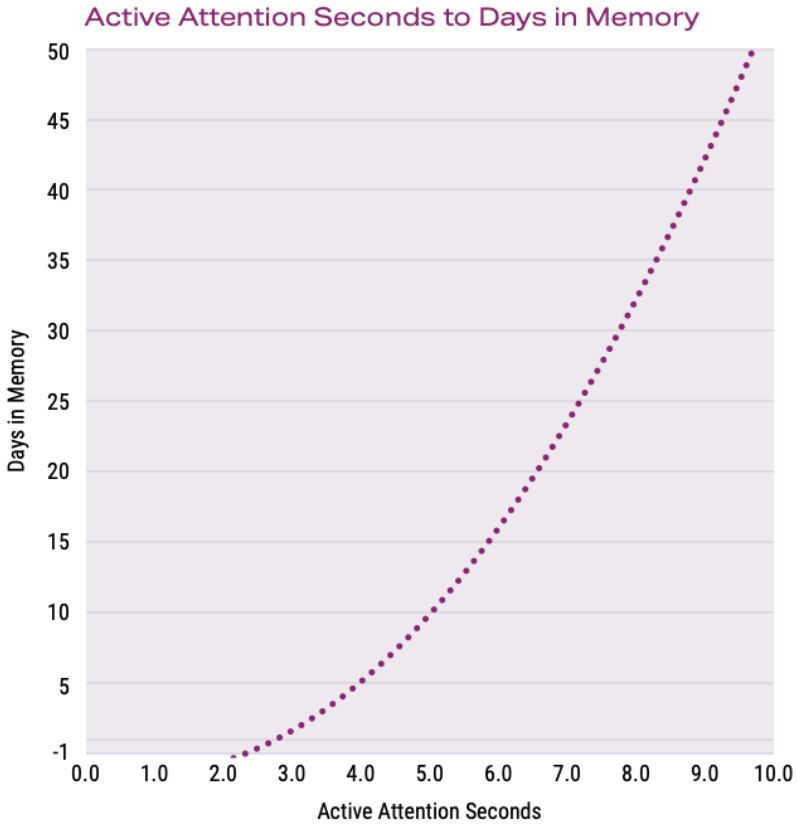
0.94

Attention correlated very strongly to conversions, returning a .94 correlation coefficient

+2.5X

High attention media drove 2.5X the number of transactions compared to low attention media

ATTENTION OUTCOMES ARE MEANINGFUL (AND PREDICTABLE)



- ➔ Generalization is key for a new measurement category
- ➔ Collective case studies show significant sameness
- ➔ Longer Replication Studies:
  - Short-Term metrics
    (Brand Choice)
  - Long-term metrics
    (Memory Retention & Mental Availability)

TVISION

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There's a Clear Correlation Between Brand Lift and Viewer Attention

It's always been intuitive: ads work best when people pay attention. Now it's proven.

At **TVision**, we have long championed Attention as a critical metric for driving meaningful results across the marketing & sales funnel. To help marketers quantify the impact of Attention, we partnered with the leading analytics platform for top-of-funnel brand advertising, **Upwave**, to quantify the correlation between TV campaigns' eyes-on-screen Attention and its real-world impact on key brand measures.

Analyzing dozens of campaigns measured by both TVision and Upwave, our teams compared lift in brand metrics for different levels of viewer ad attention to a control group. We found proof of strong correlations between % Attention (what percentage of the ad impressions captured eyes-on- screen Attention), and lift in Aided Awareness and Ad Recall.

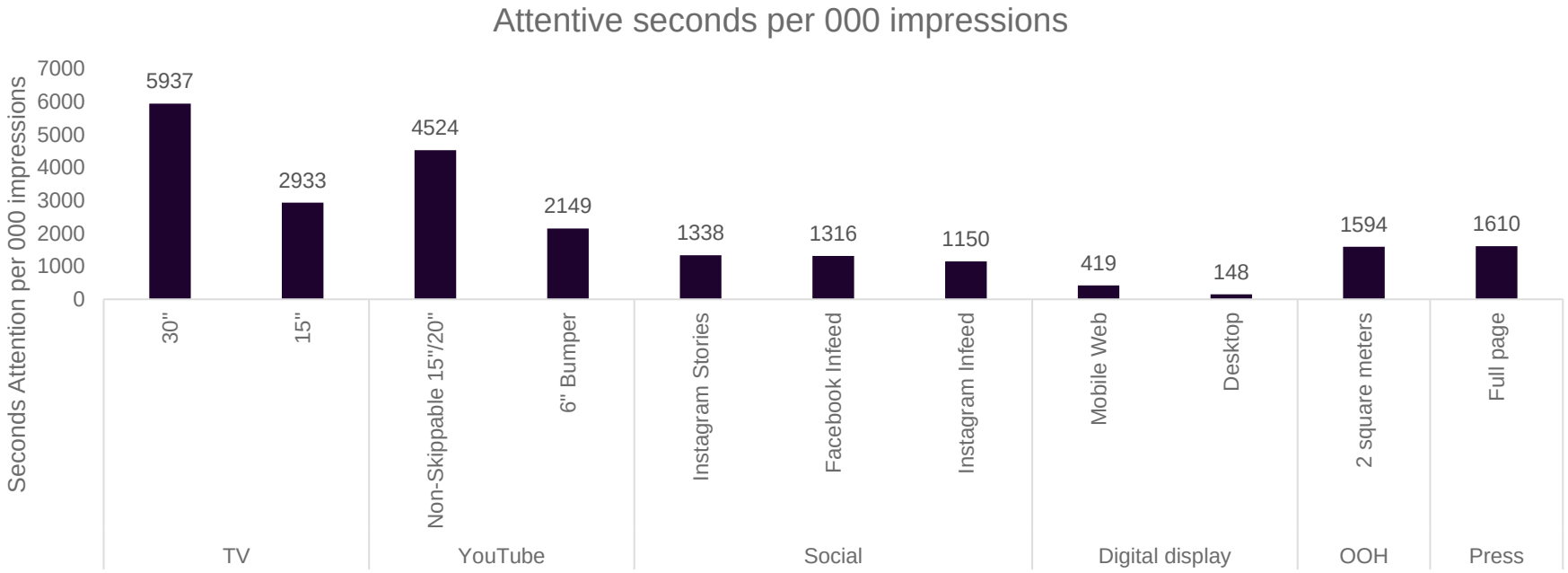
1:1

CORRELATION

The study shows that for every percentage point increase in % Attention, there is close to a 1% corresponding lift in Aided Awareness. Likewise, there is similar impact on Ad Recall.

In other words, a campaign reaching 100M people, earning 38% Attention instead of 34% Attention will result in nearly 4M additional people who think of your brand when they think of your industry.

Attentive seconds per 1000 impressions provides a single unit of attention to compare across media



Sources: Attention data from TVision (TV), Lumen (Digital, print, OOH).

How much does it cost? –TV an attention bargain?

Sources: Attention data from TVision (TV), Lumen (Digital, print, OOH). CPM data: Ebiquity

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STATE OF THE NATION

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What You Need to Know

1. 90% of ad professionals report attention metrics are important, and 65% report that attention is a conversion stage in the sales and customer journey.

2. Over half of ad pros report their organization will invest in creative and media attention metrics in the next 12 months.

3. 55% of responders report that advertisers should pay for attention metrics, and media is the dominant budget (41%) that should pay for attention metrics, followed by research (29%).

90%

of ad professionals believe that attention metrics are important

real eyes

Survey of 320 senior advertising professionals reveals a definitive business case for attention metrics
Q2 2022

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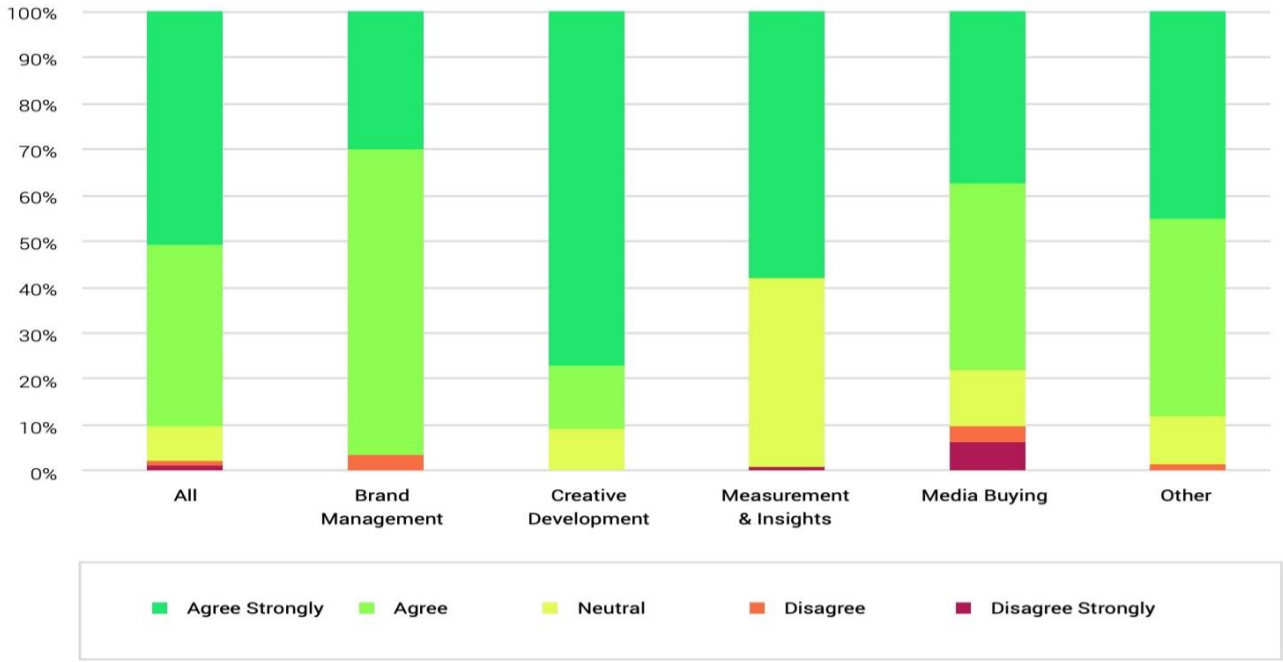
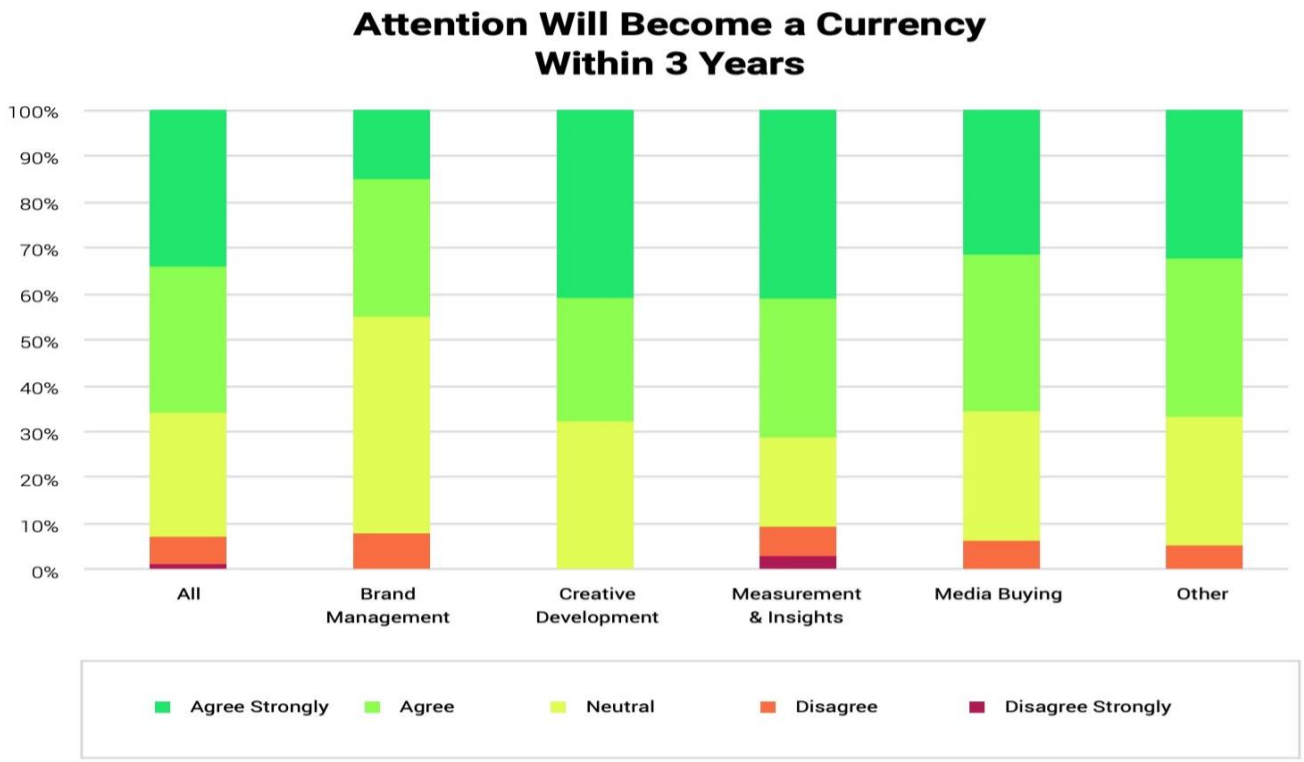
Attention is Important for My Business




Attention Will Become a Currency
Within 3 Years
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
All
Brand Management
Creative Development
Measurement & Insights
Media Buying
Other
Agree Strongly
Agree
Neutral
Disagree
Disagree Strongly

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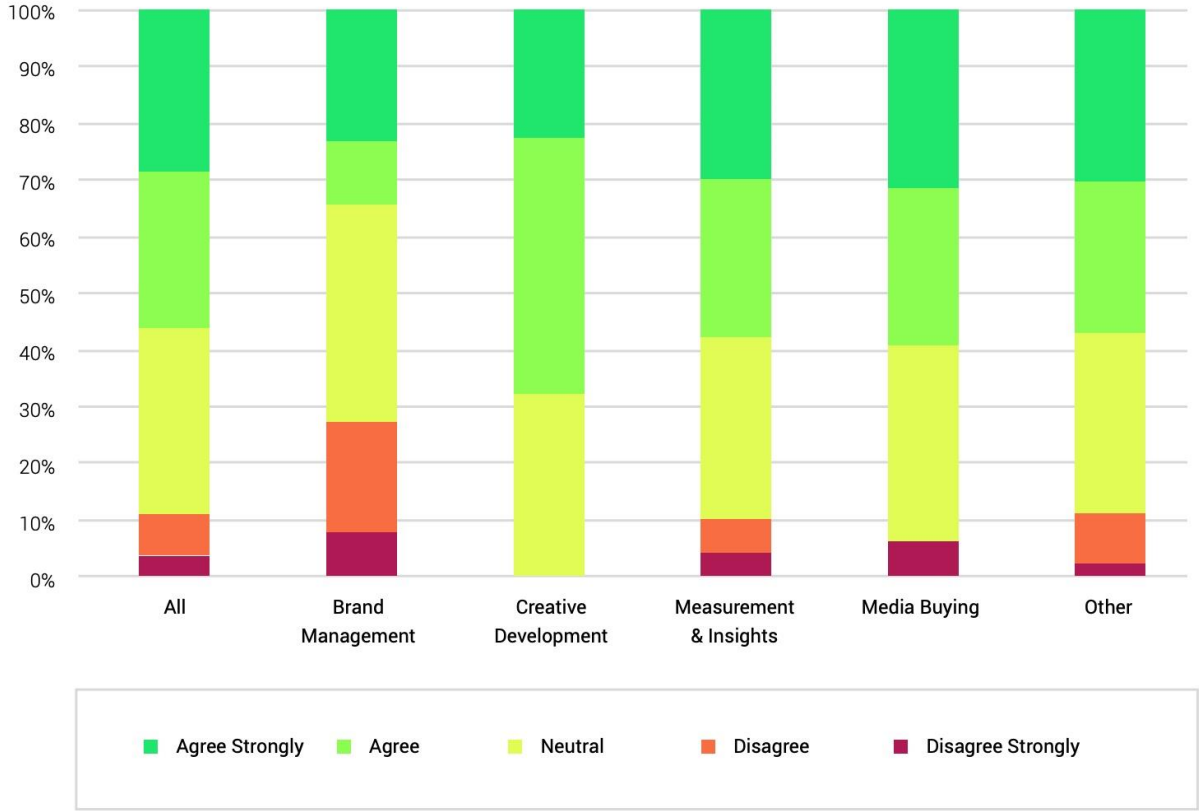
In the Next 12 Months, My Org Will Invest in Media Attention Metrics



The auditors cometh…

- With the growth in $ at risk…enter the auditor
- Double Verify announced at this year's CES that their methodology (based on heuristics) had passed a Media Rating Council audit
- This was was NOT MRC creating a standard or definition for attention as a methodology. It verified that DV are doing what they say they do.
- I have heard however that CESP is also auditing a solution from one of the French broadcasters

Advertising Research Foundation Initiative

- A neutral initiative supported by multiple stakeholders across the ecosystem
- Led by Ethan Rapp with working groups featuring advertisers such as Coca Cola, MacDonalds and Mars
- Outline has three components:

  -”Mapping the terrain” (Atlas)

  -Blind testing of the solutions for creative)

  -Modelling processes from sample to multiple media properties

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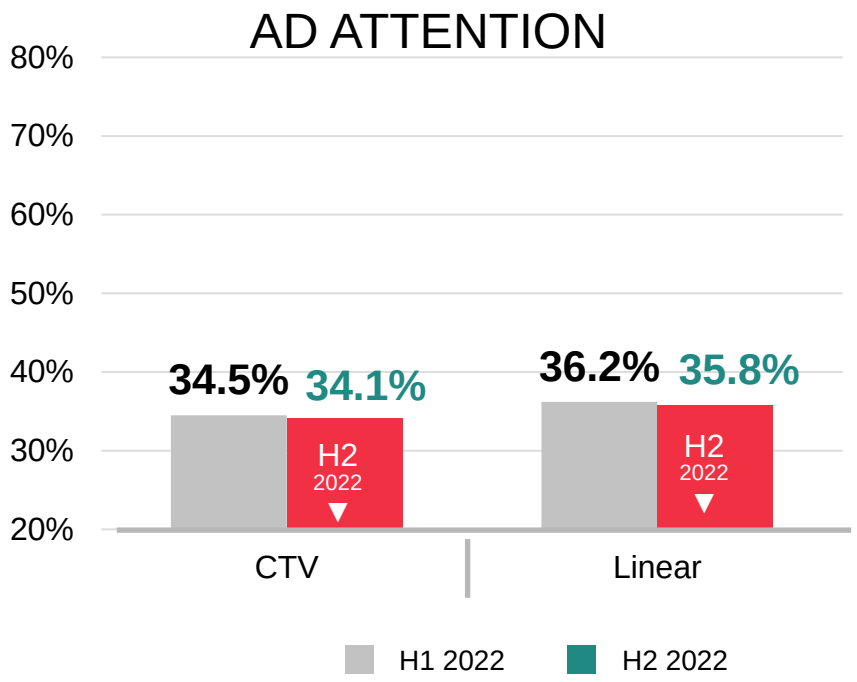
CTV/VOD Ad Attention & Receptiveness

yahoo! / PUBLICIS MEDIA

THE GAP BETWEEN VOD/CTV & LINEAR

Is Closing



Source: TVision State of CTV Report, Feb 2023

The study in numbers

66k
Ads analyzed
Jan - Nov 2022

4
CTV ad environments

1.3M
impressions

5k
TVision Panel HHs

15k
TVision Panel Individuals

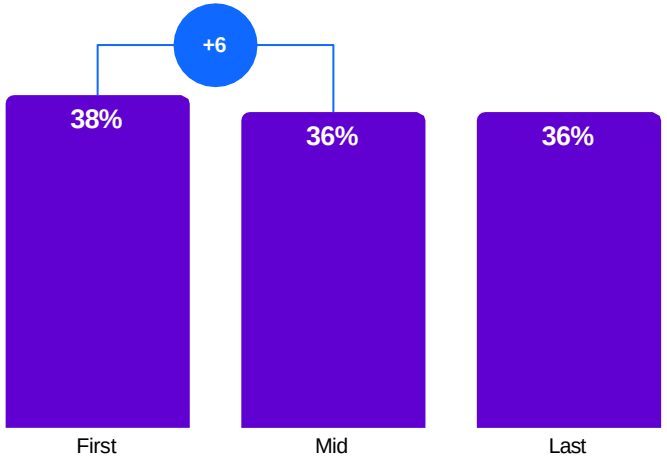
28
20 TV Journals & 8 IDIs

1k
Survey respondents

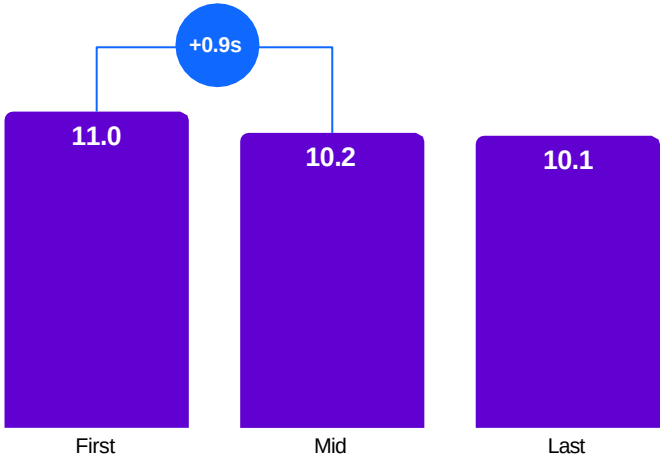
Multi-phase body of work including qualitative exploration, quantitative national survey, and large scale eye-tracking attention measurement.

Ads in the first position capture more attention than the mid & last position

ATTENTION %



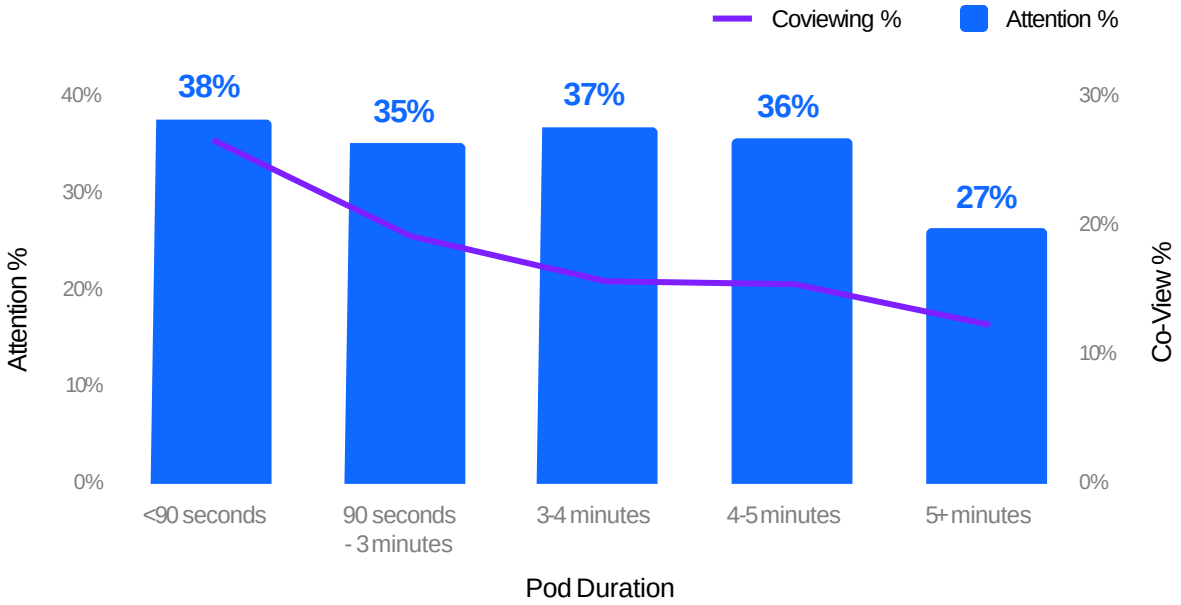
ATTENTION TIME (SECS)



> [Advertisers] should really **strive to be the first**…. The first ad in the break is the one that's likely to get the most of your attention."
>
> **–Rich, Smart TV FAST Channel**

Source: CTV Ad Attention & Receptiveness 2023

Shorter pod durations get more attention and co-viewing, and consumers are more receptive



> "[If] the commercial breaks are …too long it causes me to flip channels."
>
> –Aud, Hybrid

66%

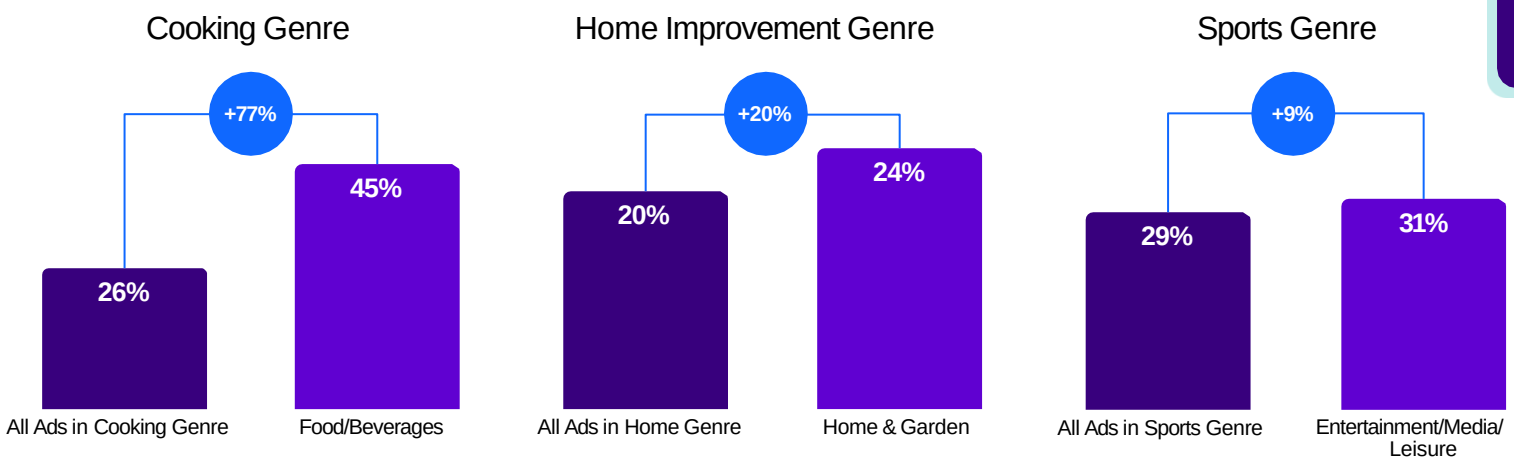
of CTV/BVOD viewers agree "I care more about the length of the ad break than the length of individual ads."

Source: CTV Ad Attention & Receptiveness 2023

Creative that is contextually relevant drives greater attention

Viewers pay 77% more attention to Food/Bev ads aired in cooking showed than the avg ad

ATTENTION %- 30 SECOND ADS



"I saw **an ad for the NHL while watching the Washington Capitals game. I thought this ad was awesome"**

–Ella, vMVPD

Source: CTV Ad Attention & Receptiveness 2023

Audio branding is critical in low attention environments

Even when consumers are not watching the ad, they are listening

81%

agree that when TV is on in the background they still hear/ listen to the audio
(89% of Heavy AVOD users)

> **The sound is able to permeate my space** so even if I'm filling up my drink **I'm still hearing it – though I may not be seeing the full visual."**
>
> **–Bill, vMVPD**

Source: CTV Ad Attention & Receptiveness 2023

TV Trading implications of Attention Metrics

Planning and trading implications

- Need for accepted currency by both buy and sell side
- Differential pricing for higher attention inventory/content?
- Attention metric guarantees?
- Controlling quality of creative?
- More outcomes-based trading? (explanatory variable with attribution measurement)
- ANA (US), ISBA (UK) and ACA (Ca) developing cross screen solutions – putting TV impressions alongside online video (and other digital impressions)
- Can attention metrics provide a quality measure/weighting for these solutions?

…or a weighting for TOVA?

- Application of weights to the TOVA panel
- Requires consensus view on the data?
- Agency or vendor proprietary inputs?

coverguide noord.xlsx

Open with Microsoft Excel

1/04/2022 - 30/04/2022 North 16+: 18-54 Commercial break Channel/dayparts	Campaign period 1/04/2022 - 30/04/2022														
	Medium	Plan C/GRP EQ	Base CPM EQ	GRP	Impressions Base	Buying IMP	Plan IMP	Budget	Budget %	Static	Reach %	Reach N	OTS	Eff factor	User grouping
Ads & Data TV PLAY Family: Mon-Sun 07-26	TV	929	13.7	0	0	0	0	0	0	x	0	0	0	1	TV
Ads & Data TV Thematical: Mon-Sun 07-26	TV	1100	11.4	0	0	0	0	0	0	x	0	0	0	1	TV
DPG TV VTM Family: Mon-Sun 07-26	TV	992	13.9	0	0	0	0	0	0	x	0	0	0	1	TV
DPG TV Longtail NL: Mon-Sun 07-26	TV	1198	15.7	0	0	0	0	0	0	x	0	0	0	1	TV
Transfer TV Thematical NL: Mon-Sun 07-26	TV	1299	17.4	0	0	0	0	0	0	x	0	0	0	1	TV
LF OLV on Ads & Data	Online	383	10	0	0	0	0	0	0	x	0	0	0	0.95	Online video broadcasters
LF OLV on VAR	Online	449	10	0	0	0	0	0	0	x	0	0	0	0.95	Online video broadcasters
LF OLV on DPG Media	Online	489	10	0	0	0	0	0	0	x	0	0	0	0.9	Online video broadcasters
SF OLV on Ads & Data	Online	538	10	0	0	0	0	0	0	x	0	0	0	0.85	Online video broadcasters
SF OLV on DPG Media NL	Online	486	10	0	0	0	0	0	0	x	0	0	0	0.85	Online video broadcasters
YouTube TrueView	Online	272	7	95	3689704	3689704	2900974	25828	100		19.2	585335	5	0.35	YT
YouTube Unskippable Preroll	Online	396	7	0	0	0	0	0	0	x	0	0	0	0.85	YT
# TOTAL PLAN #		272		95	3689704		2900974	25828		x	19.2	585335	5		

1/04/2022 - 30/04/2022 North 16+: 18-54 Commercial break Channel/dayparts	Campaign period 1/04/2022 - 30/04/2022														
	Medium	Plan C/GRP EQ	Base CPM EQ	GRP	Impressions Base	Buying IMP	Plan IMP	Budget	Budget %	Static	Reach %	Reach N	OTS	Eff factor	User grouping
TV	TV			0	0	0	0	0	0	x	0	0	0	1	TV
Online video broadcasters	Online			0	0	0	0	0	0	x	0	0	0	1	Online video broadcasters
YT	Online	272	7	95	3689704	3689704	2900974	25828	100		19.2	585335	5	0.35	YT
# TOTAL PLAN #		272		95	3689704		2900974	25828		x	19.2	585335	5		

YT true | YT 5050 | YT Unskip | TV | BVOD LF | BVOD LF2 | BVOD SF | BVODL+S | 21 All YTTrue | 23 AllYT5050 | SF+YT | Cover Reach | Cover OTS

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THANK YOU