ADVERTISING ATTENTION IN THE WILD – A COMPARISON OF ONLINE AND TELEVISED VIDEO ADVERTISING

Created in partnership with

YuMe

By

IPG Media Lab

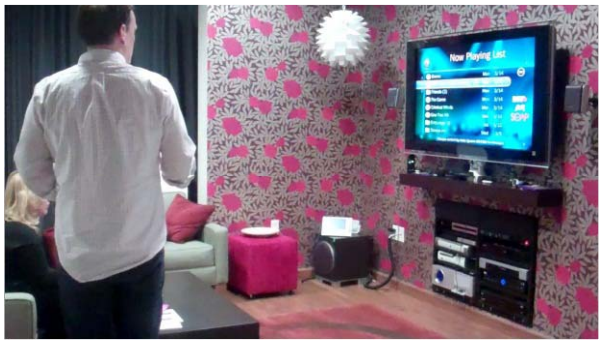
May 2011

Questions we set out to answer

1. How much more ad avoidance happens beyond active ad skipping?
2. What is the relative attention level to video advertising in a lean forward PC experience vs. a lean back TV experience?
3. What behaviors most distract attention to video ads?

Methodology

- March 2011
- Los Angeles
- Recreated normal viewing choices
- Respondents brought companion media
- 30 minutes in office/30 minutes in living room
- Post survey on ad recall



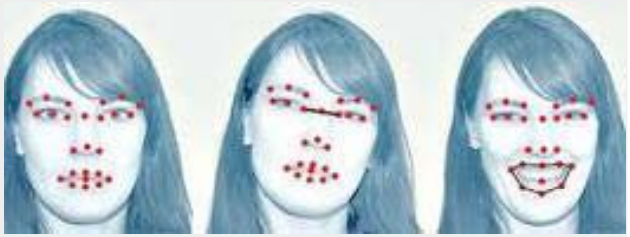
Sample: N=48

- Recruited from LA metro area
- Must watch online video

Gender			**Employment Status**			**Household Income**	
Female	48%		Full-time	56%		$100,000-$200,000	13%
Male	52%		Part-time	31%		$75,000-$100,000	19%
			Retired	6%		$50,000-$75,000	33%
Age			Student	4%		$25,000-$50,000	25%
18-24	15%		Unemployed	2%		Less than $25,000	10%
25-29	15%						
30-34	10%		**Education**			**Children <18 in Household**	
35-39	10%		High school/GED	8%		No	77.08%
40-44	15%		Some college	27%		Yes	22.92%
45-49	13%		Associate's degree	6%			
50-55	10%		Bachelor's degree	48%			
56-60	6%		Master's degree	6%			
65-69	6%		Doctorate degree	2%			
			Trade or other technical school degree	2%			

Attention scores explained

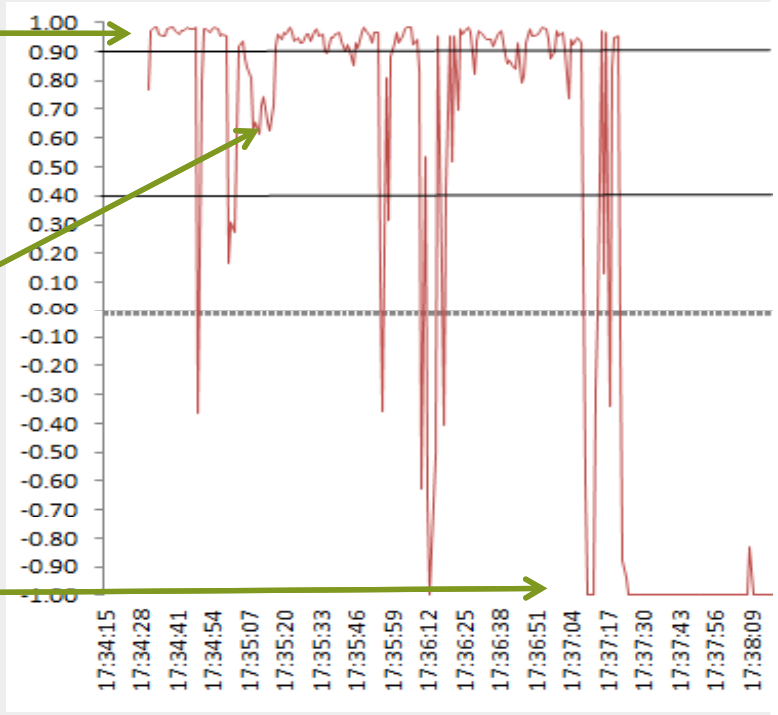
Frame by frame, second by second.



1 to 0.9
Full attention

0.9 and 0.4
Partial attention

0.4 to -1
No attention



Scale of TV ad Fast Forwarding

35% US DVR HH penetration

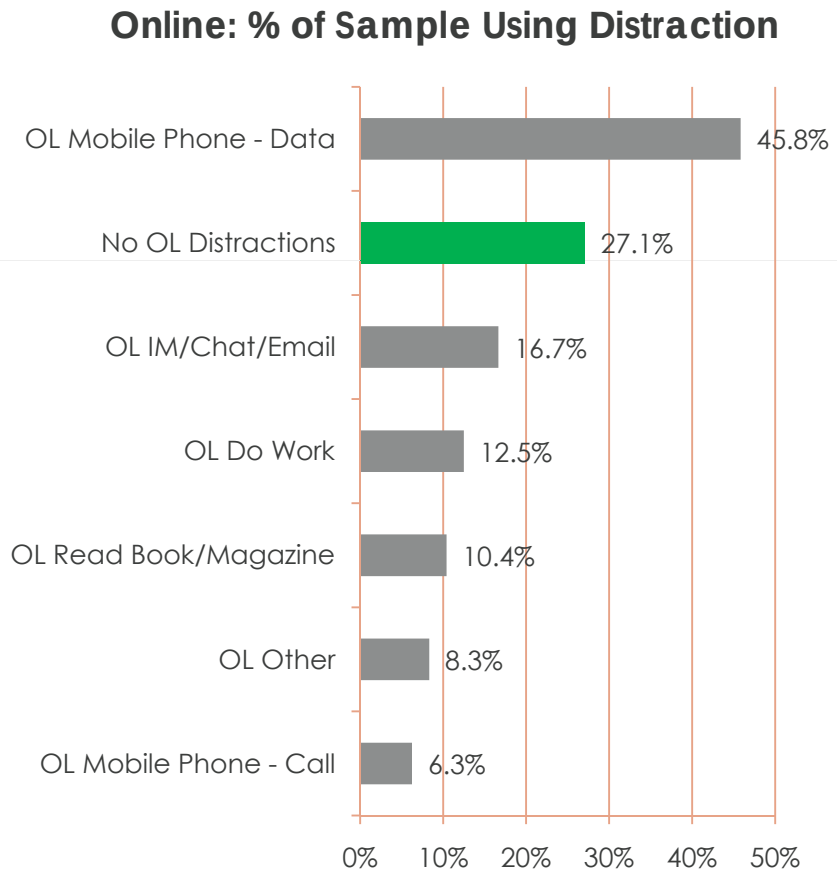
10% of DVR HH viewing time shifted

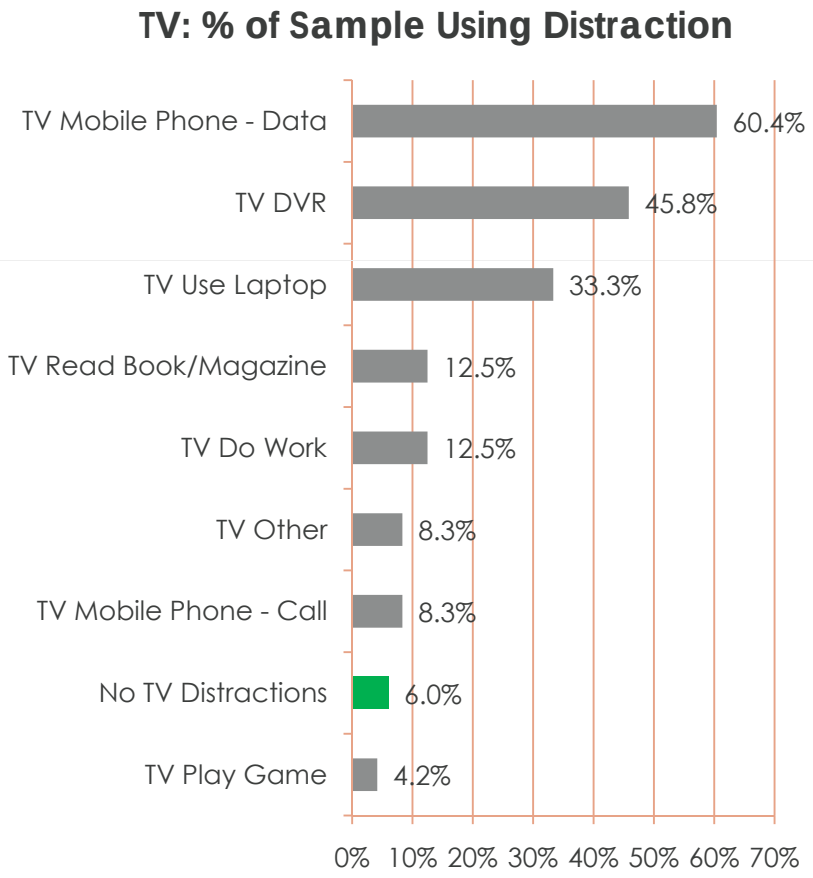
x **65%** of ads skipped in time shifted viewing

2% of total TV impressions skipped

Source: Magna Global

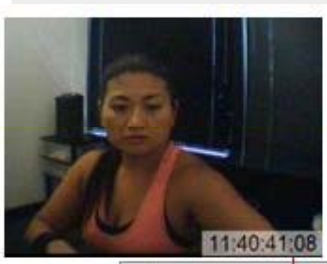
Smart phones are the most common distraction media

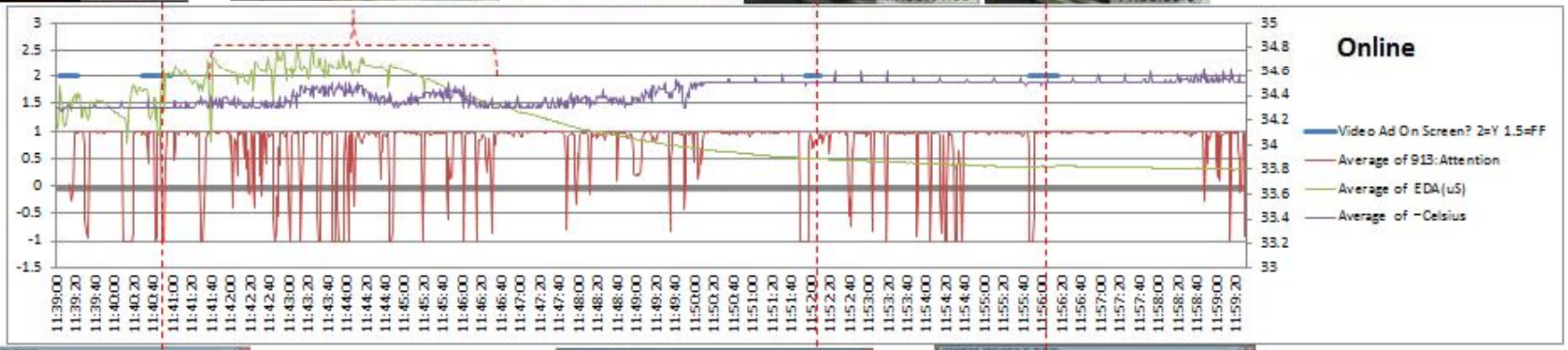




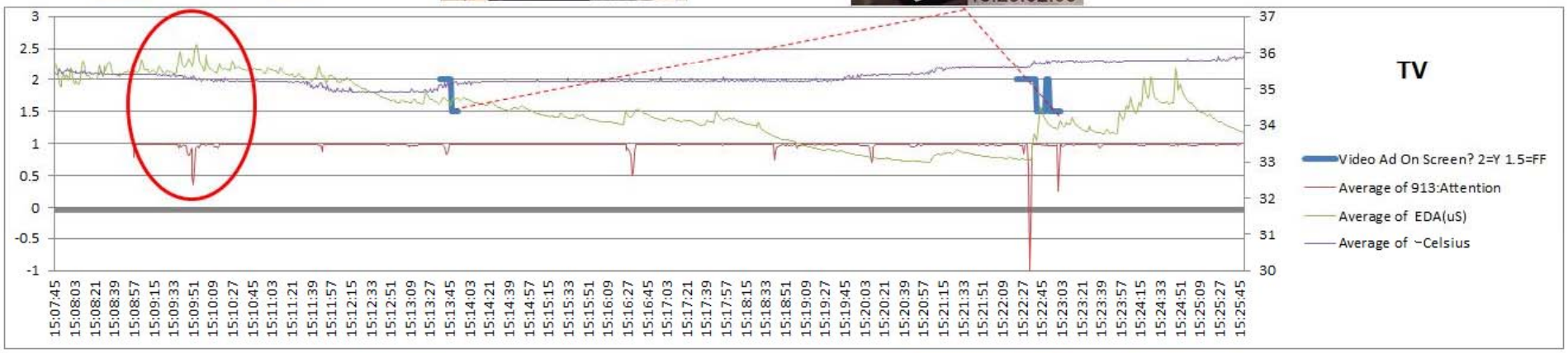
Persona 1: Cathy the Ad-Ignorer

Persona 2: Michie the Multi-tasker

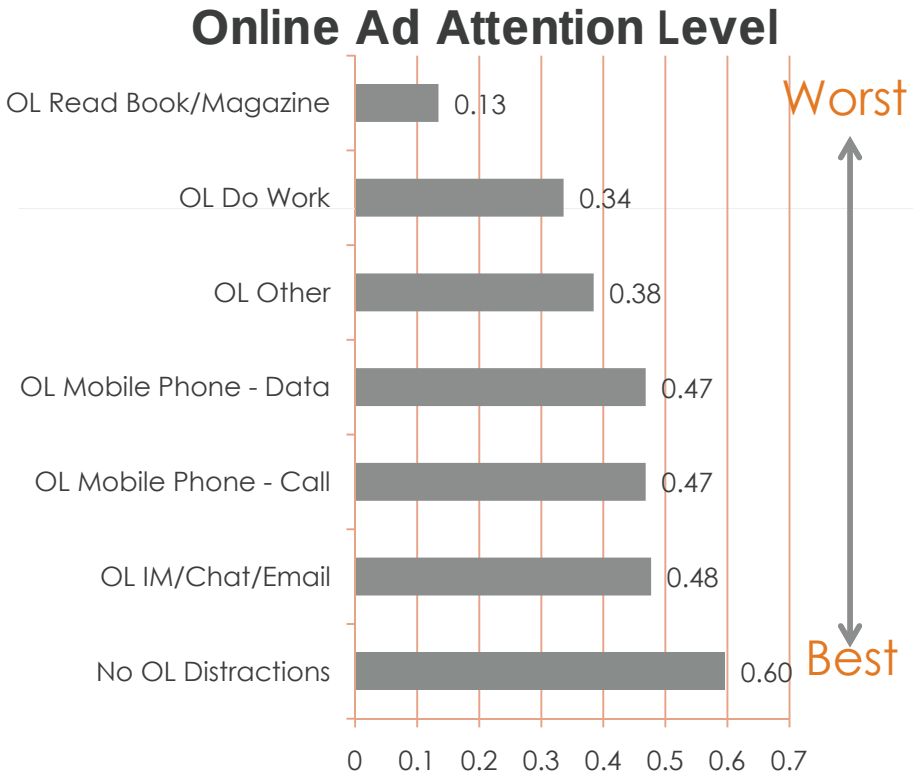


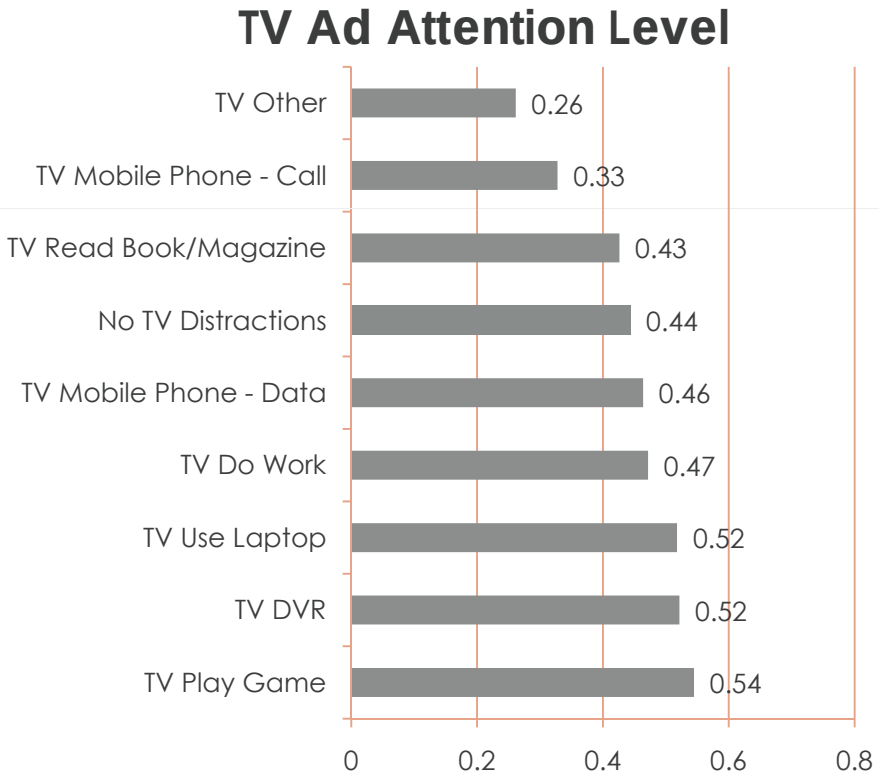


Persona 3: Steve the Vegged-Out Relaxer

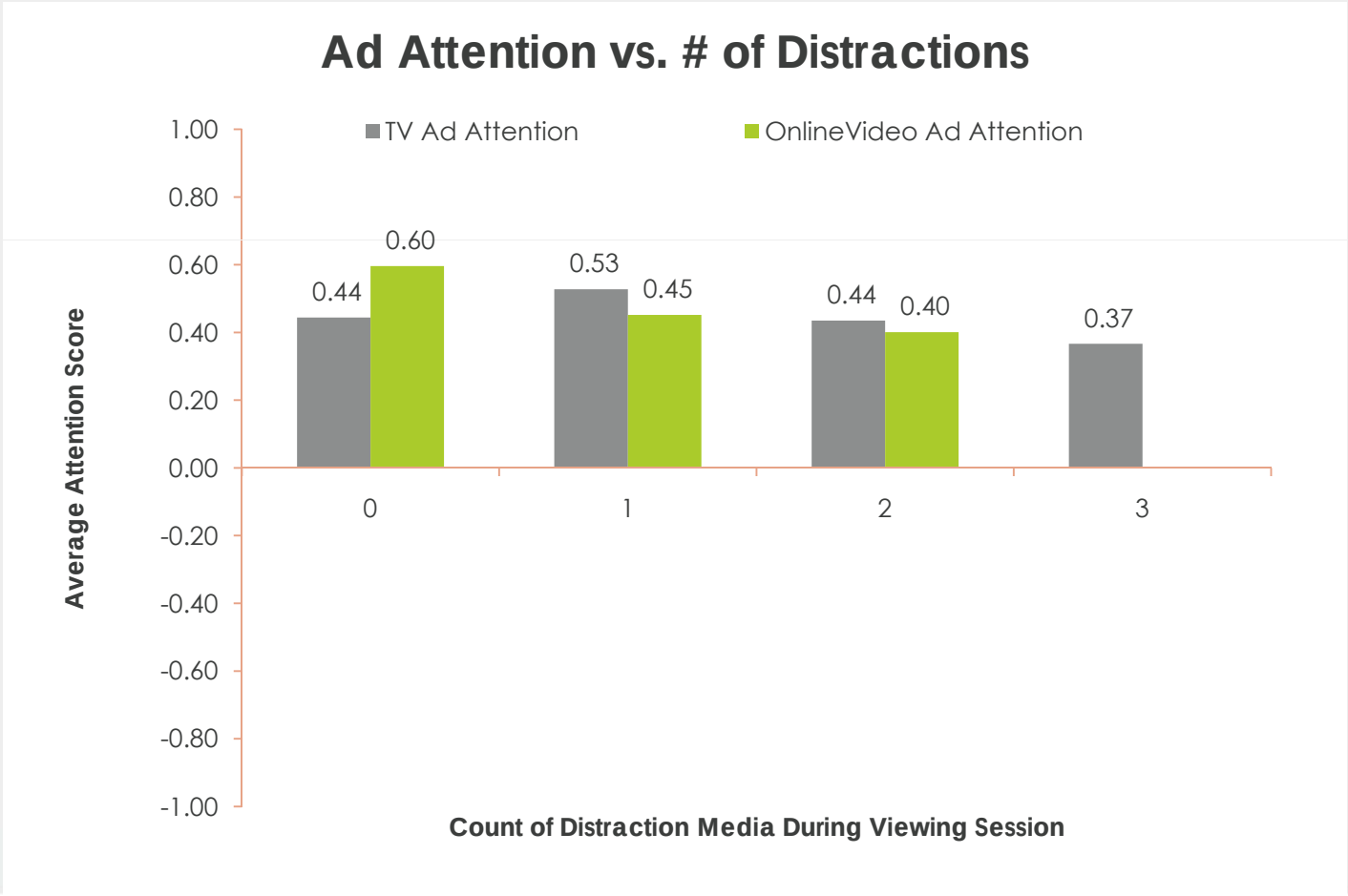


Finding #1:
Not all distractions are equal





Finding #1 (cont.):
The more distractions, the lower ad attention

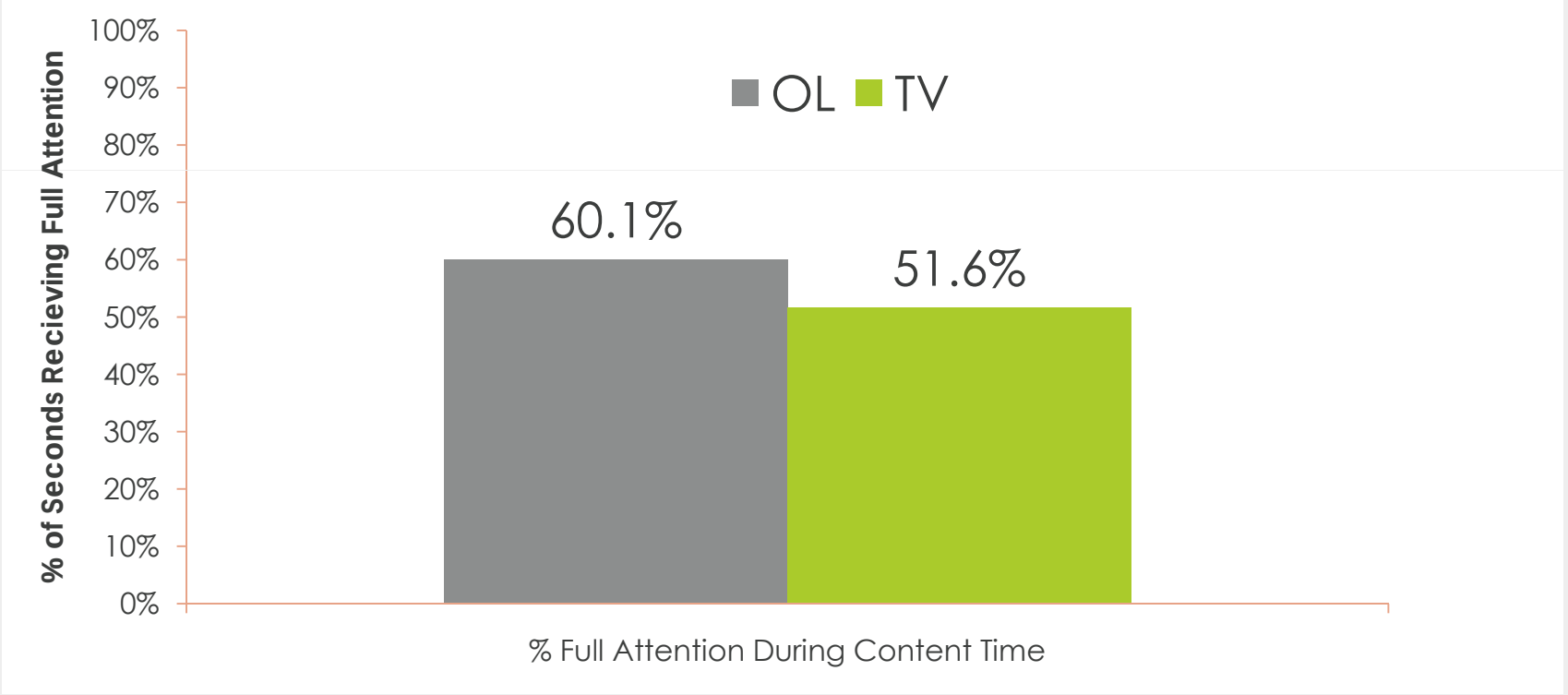


Finding #2:
TV 2x video clutter; Ubiquitous banners

	OL	TV
Video	5.5	9.5
Banner/ Bug	21.6	0.7
Total	27.1	10.3

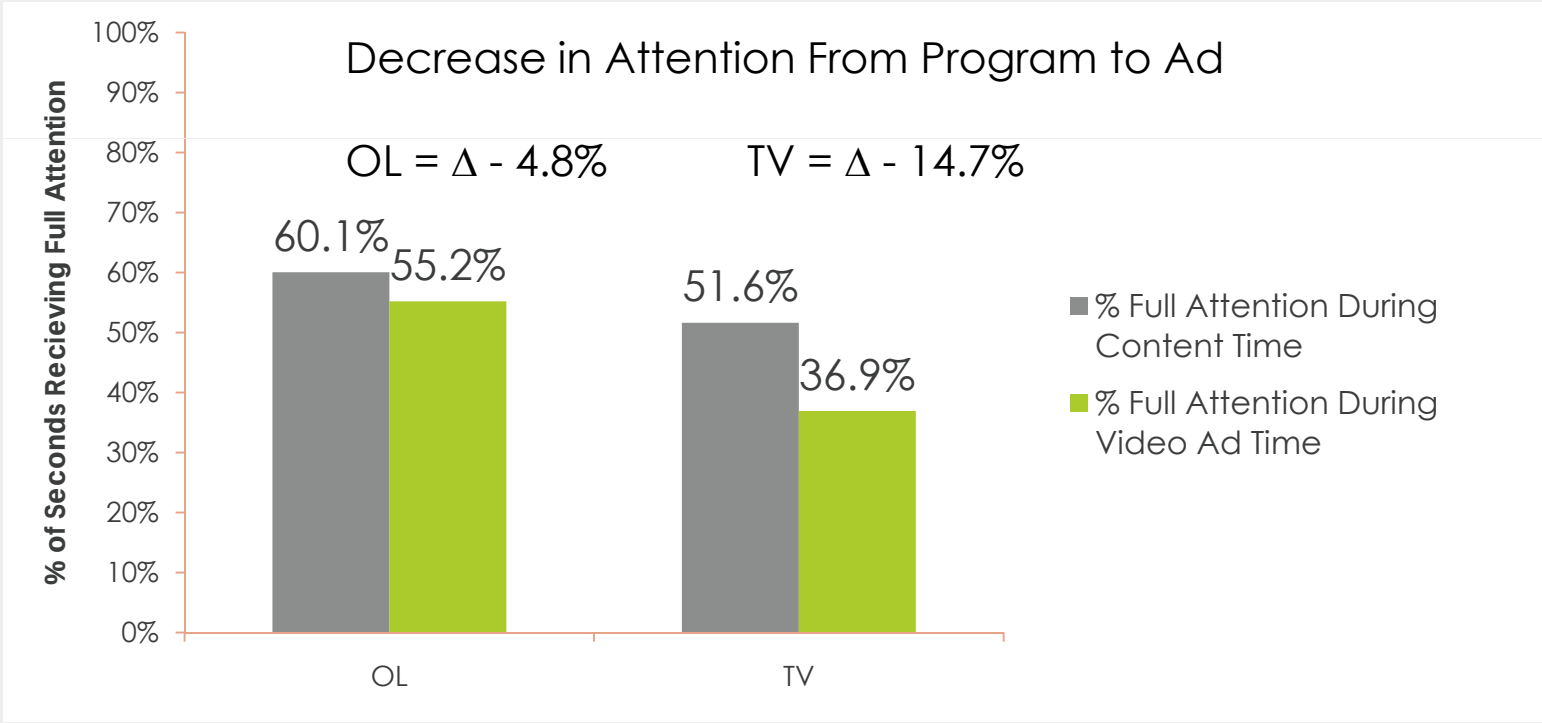
Finding #3:

Online video content +8.5% more attention



Finding #4:

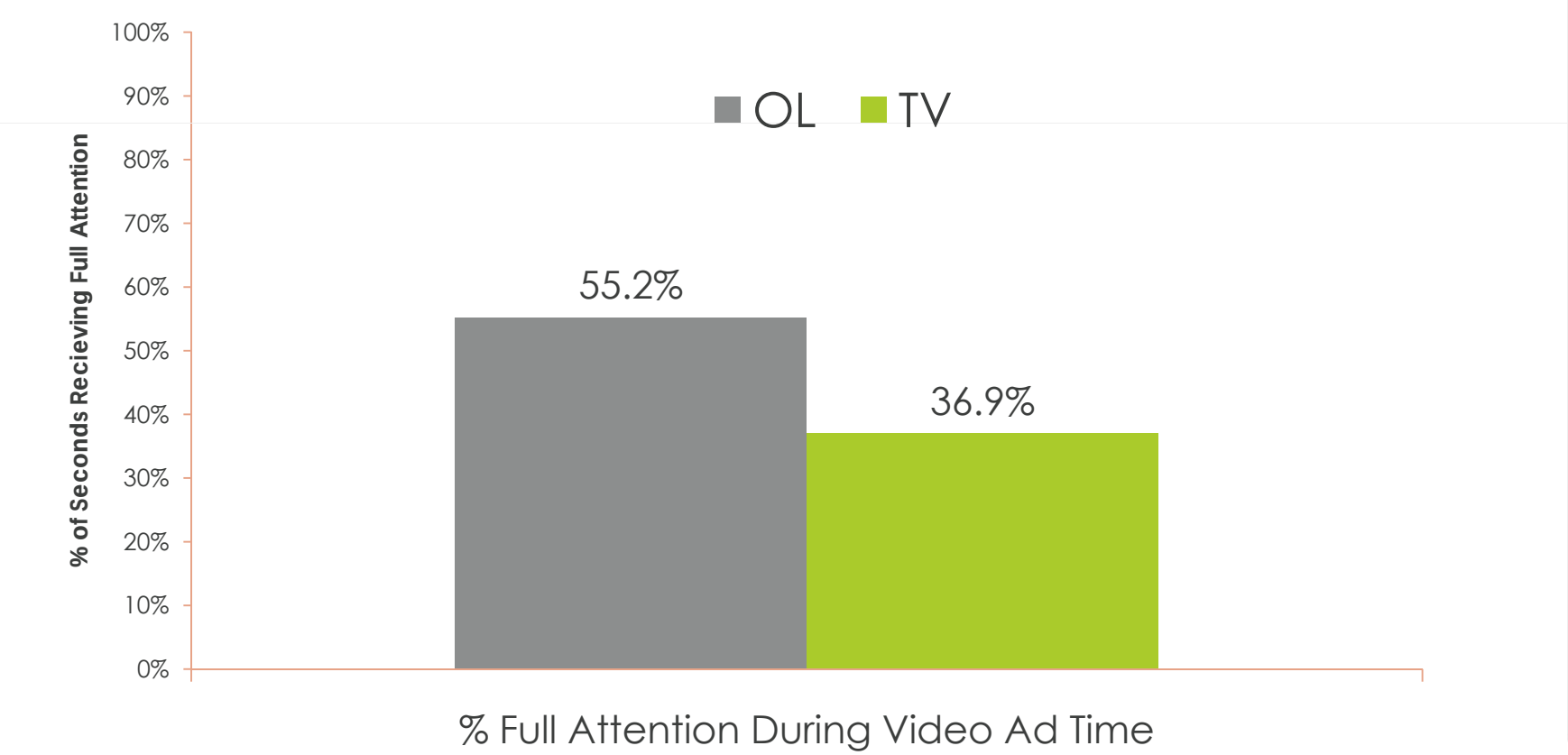
TV has 3x drop in attention from content to ad



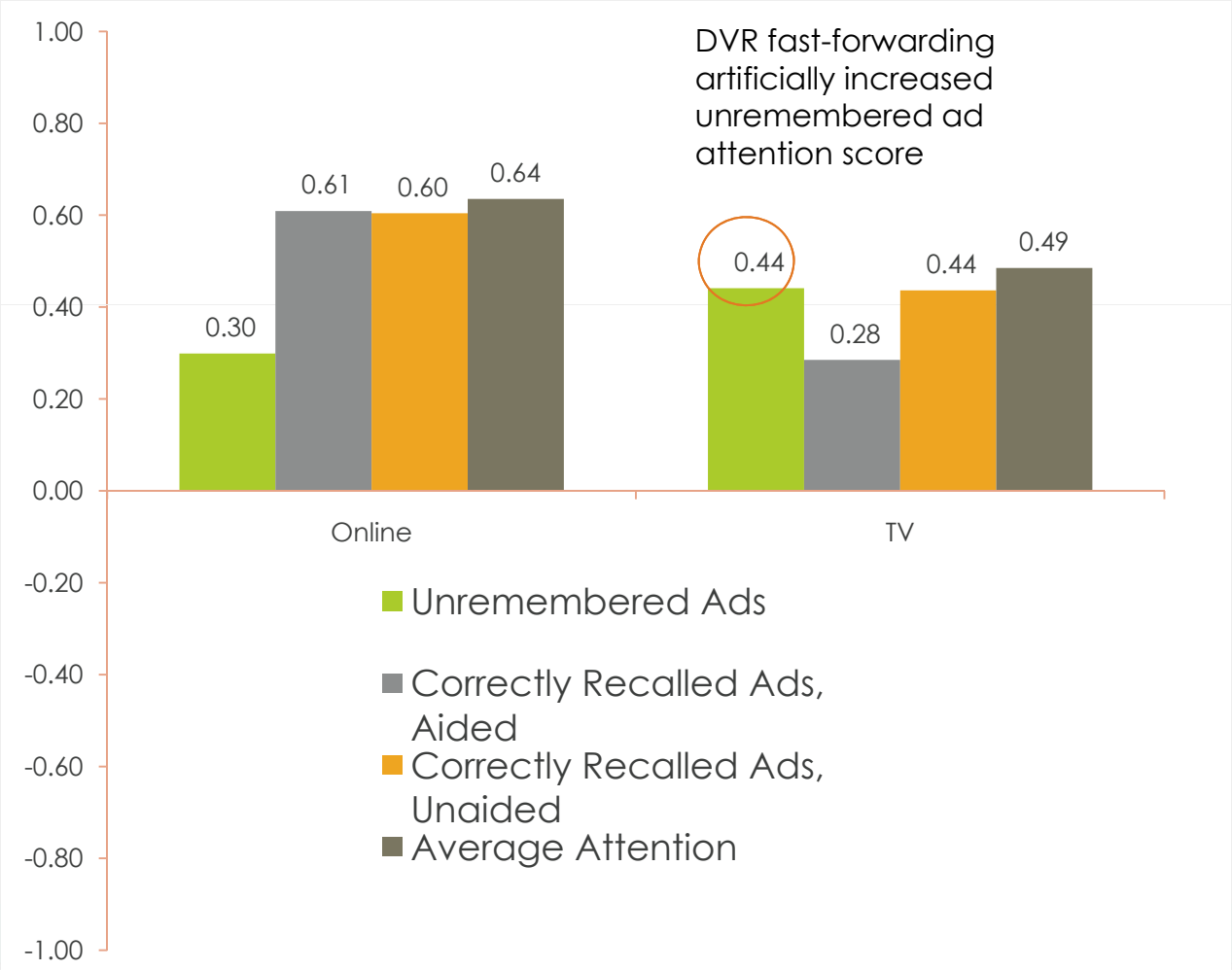
Finding #5:

Online video ads +18.3% more attention than TV

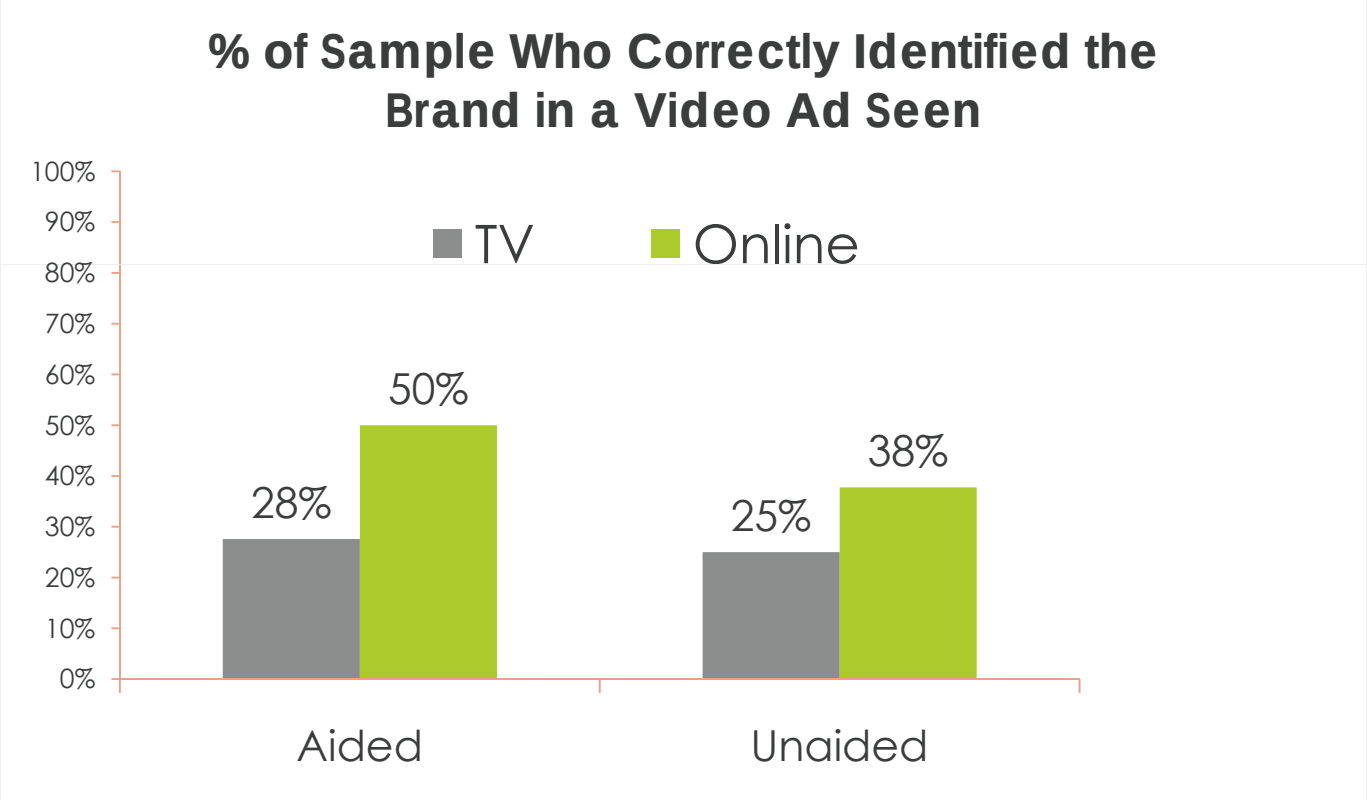
- 63% of TV impressions were ignored.
- DVR fast forwarding is estimated to lead to 2% ad skipping



Finding #6:
Attention is correlated with recall

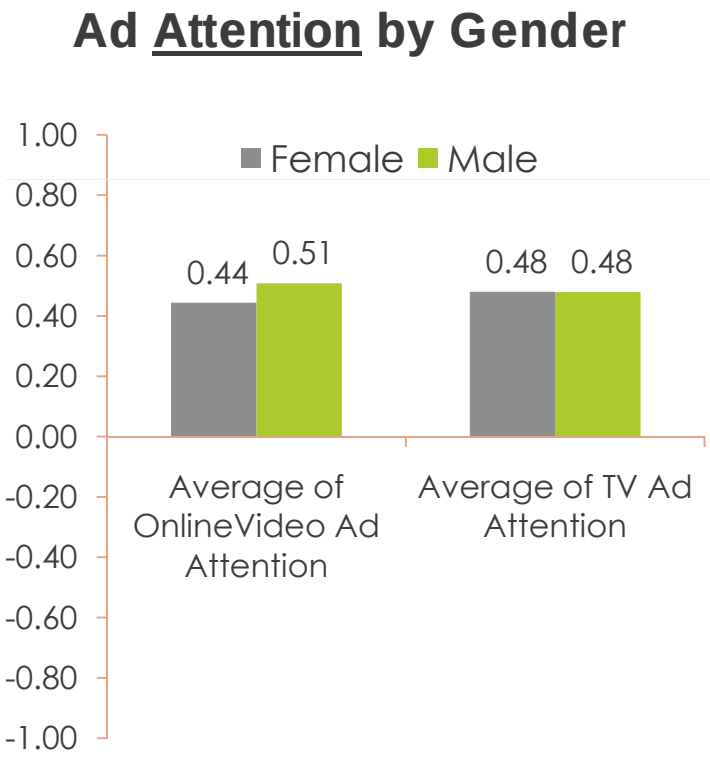


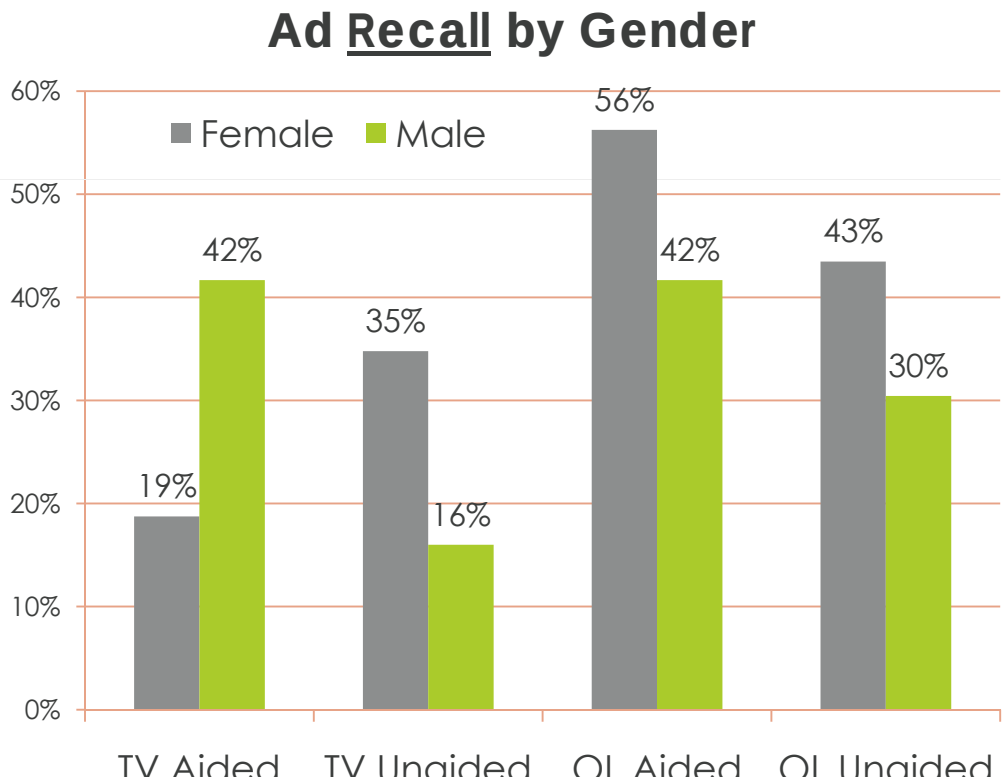
Finding #7: Online ads have 1.8x the aided recall and 1.5x the unaided recall



Aided Recall is statistically significant at 90% level of confidence

Finding #8: Gender attention is even, Women more likely to recall video ads





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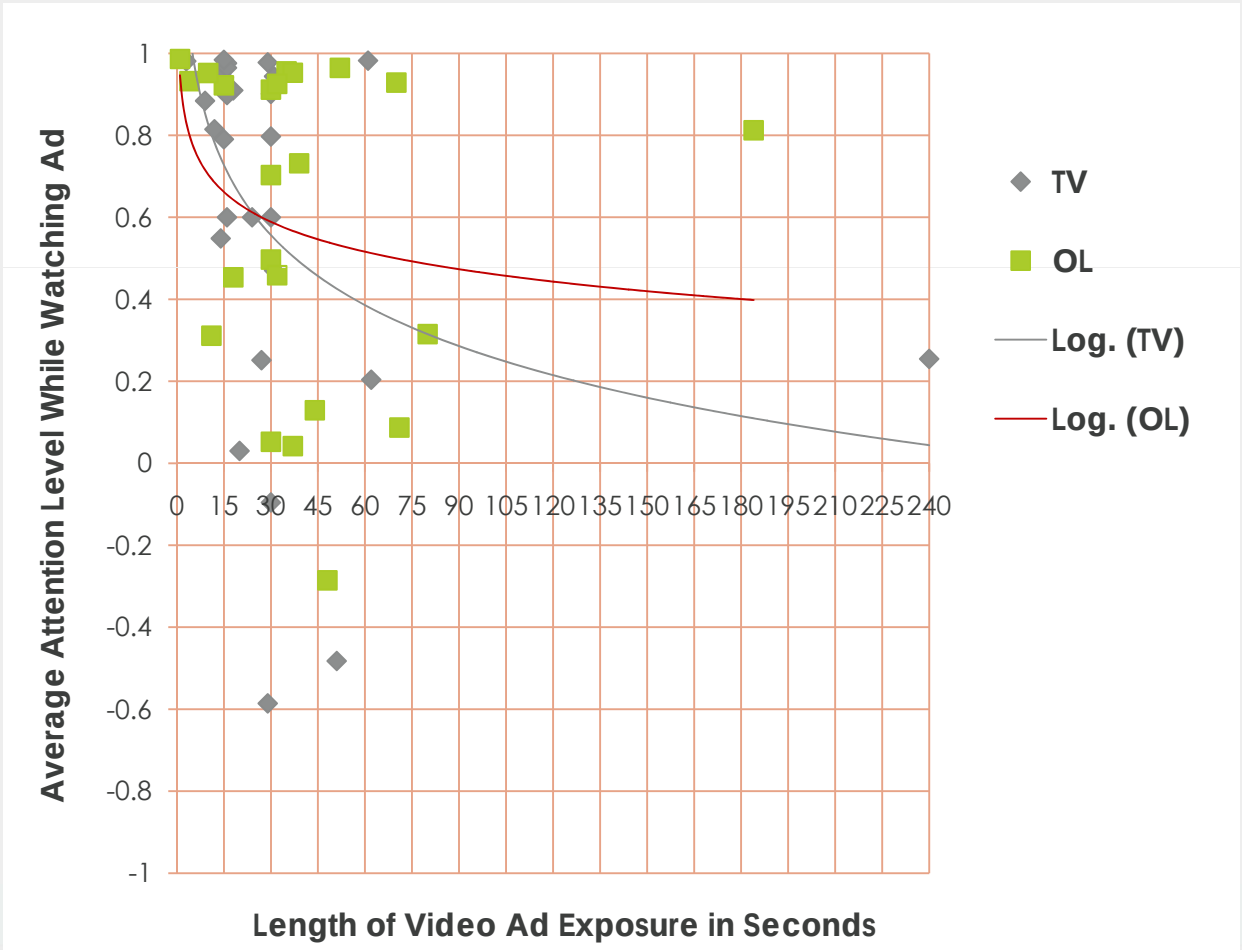
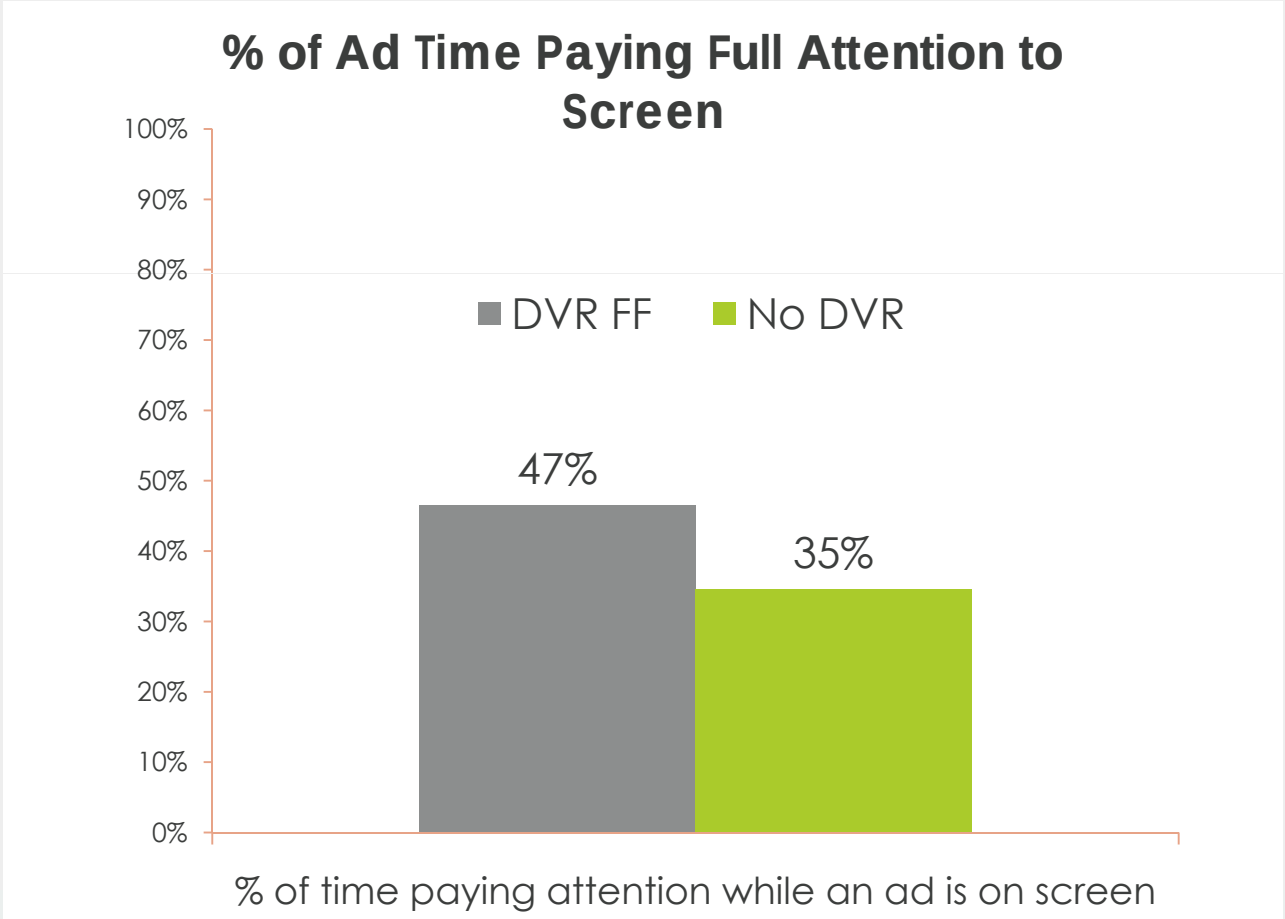
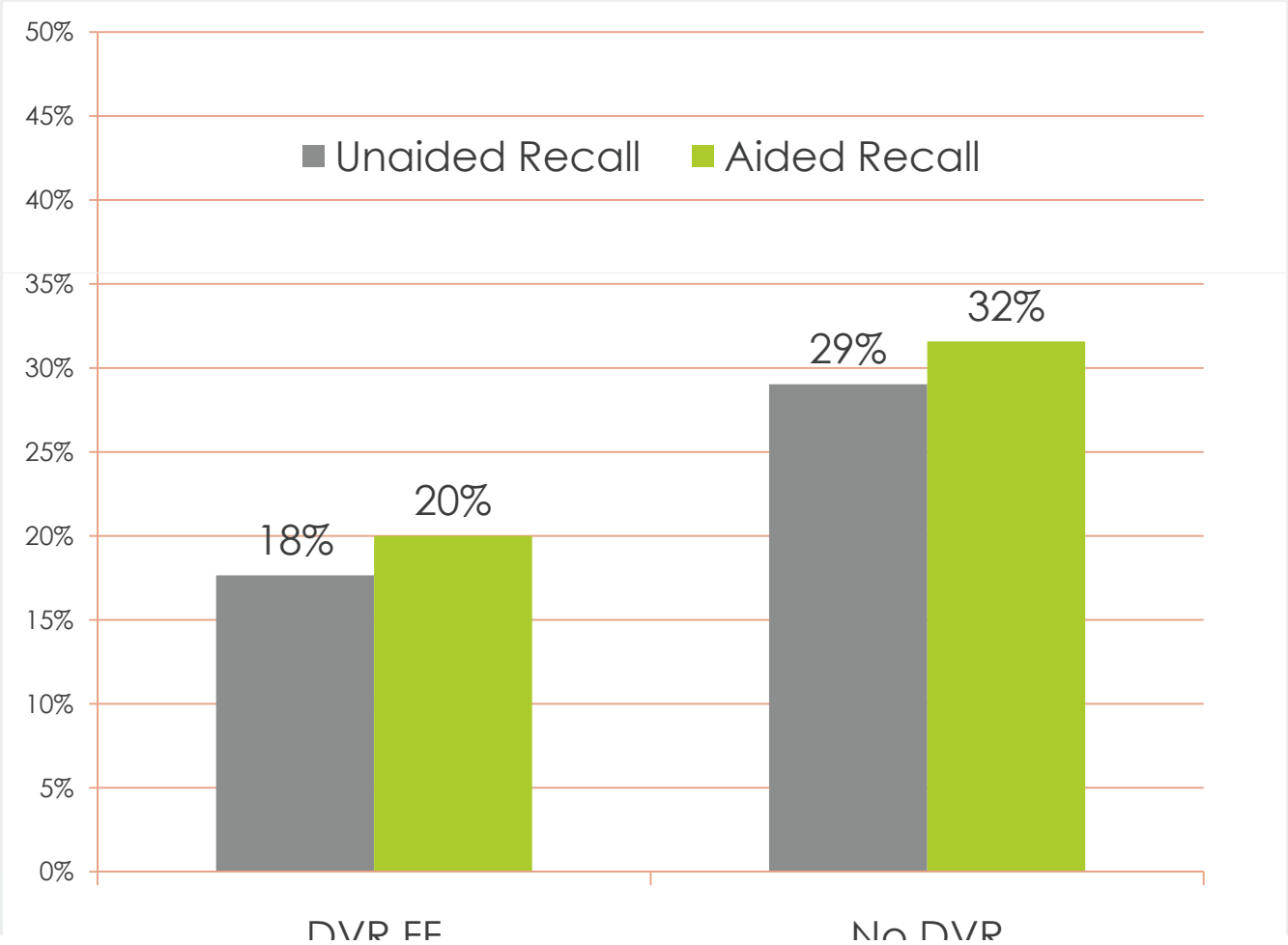
Finding #9:
Ad attention drops off with time on screen



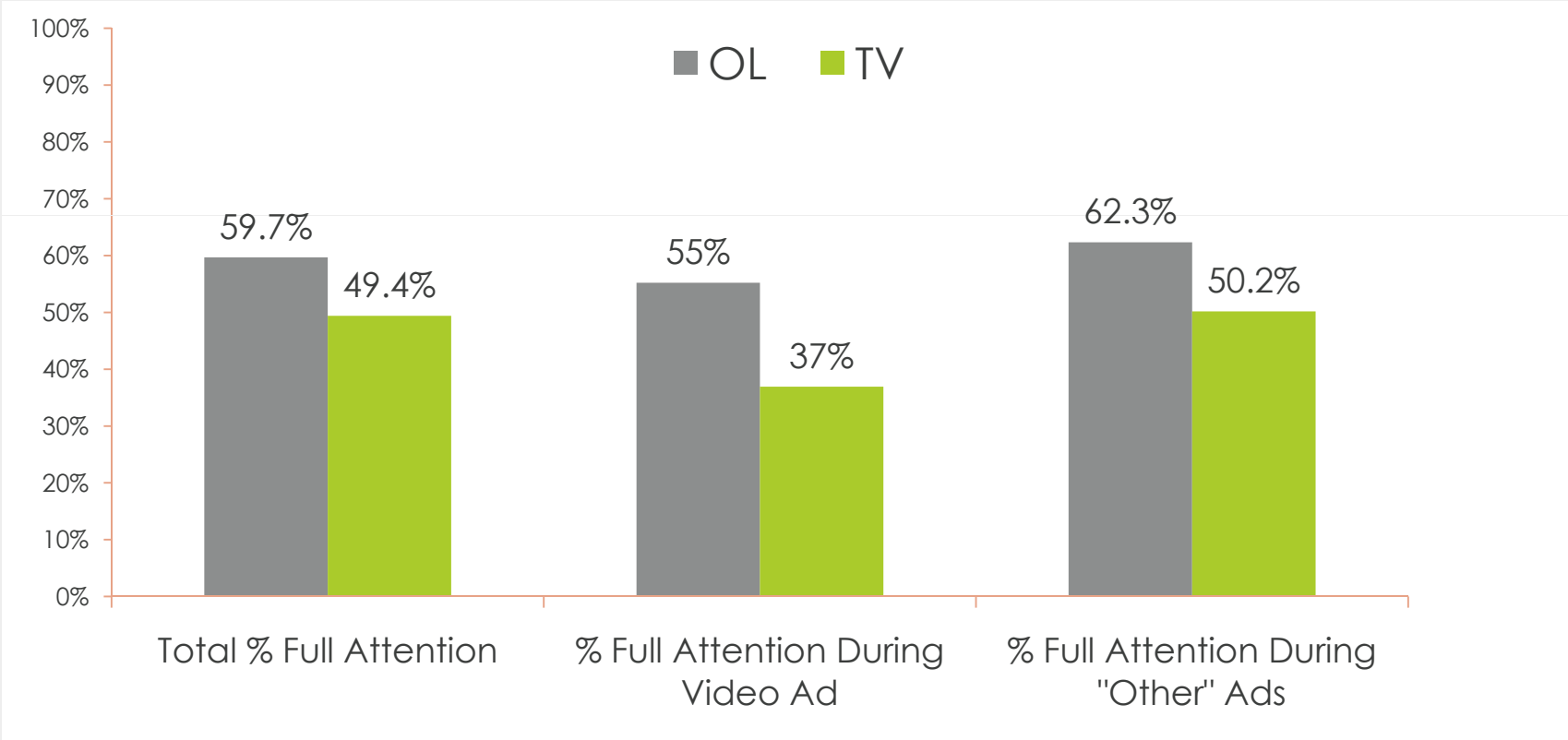
Finding #10:
Ad Fast-Fowarders have high attention levels…



Finding #10 (cont.) :
Fast-Fowarders have low recall levels



Finding #11: Attention is1.4x higher for TV "bugs" than video ads



Conclusions

1. Ad fast forwarding accounts for a sliver of wasted ad impressions
2. Smart phones are a persistent companion to video content
3. Online video ads have 20% more attentive impressions.
4. The familiar cadence of TV content increases drop off to ads vs. online
5. Attention is even but women more likely to recall video ads than men
6. Fast forwarded video ads have little recall
7. The commercial "layer" gets more attention than the commercial break.

THANK YOU!

Travis@yume.com

Brian.Monahan@ipglab.com