

FROM VIEWABLE TO VIEWED: USING EYE TRACKING TO UNDERSTAND THE REALITY OF ATTENTION TO ADVERTISING ACROSS MEDIA

Challenge: measuring the reality of attention

People are very good at ignoring ads. We have to be. We receive thousands of commercial messages a day and have to have a way of filtering them out so we can concentrate on what we are really interested in. As advertisers, we cannot assume that just because people have an opportunity to see an ad they will, in fact, see it.

Measuring 'opportunity to see' (OTS) or 'viewability' of advertising is a hot topic at the moment. Should advertisers pay for ads that consumers never had a realistic chance of seeing? Media owners talk about it. Media agencies talk about it. Advertisers talk about it – and have a simple answer to the question. According to Keith Weed, CMO of Unilever, non-viewable ads are *'like having your billboards underwater, it's a complete and utter waste of our money. I believe that we should get what we pay for.'*

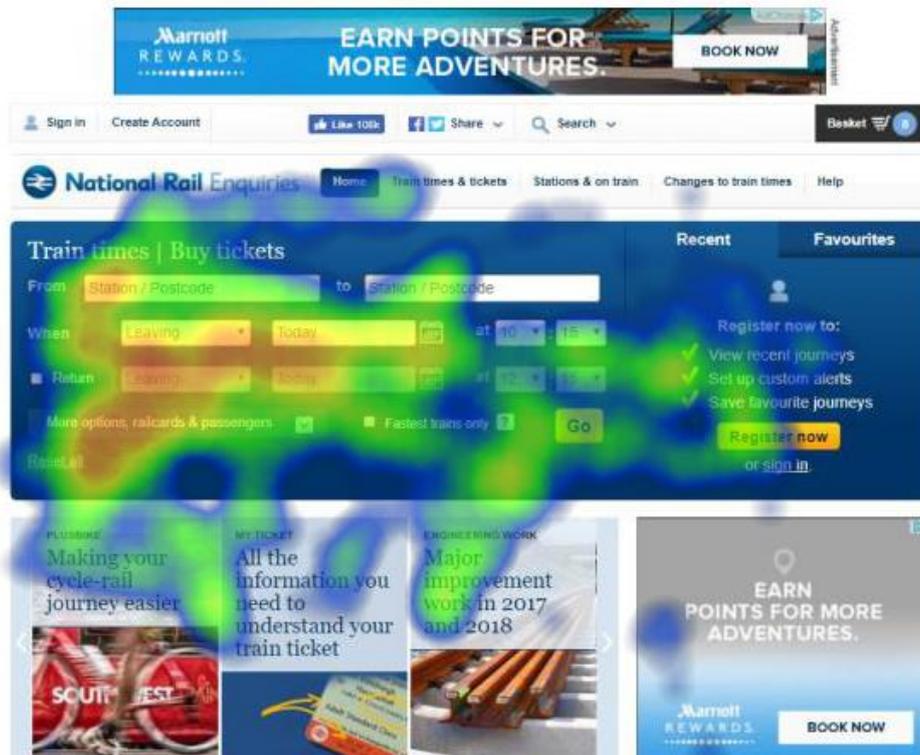
Opportunity to see, doesn't mean really seeing it

But in reality, viewability is only a proxy for the real question: how many people actually engaged with my ad? Unless people notice and then spend time with an ad, it cannot deliver the message that it is designed to convey. Viewability data can tell advertisers how many people had the opportunity to see an ad, but it cannot tell you how many people actually saw it.

This is an important question because not all media are created equal. Our ability to notice and engage with ads in some media is much greater than in others. We have an intuitive feeling that a big, bold ad in the cinema will receive more concentrated attention than a banner ad on a website, but, if 50% of the banner ad's pixels are on screen for 1 second or more (the current viewability standard for digital display ads), then the OTS or viewability of the two ads is the same. We also assume that the quality of this engagement is different: the dwell. Dwell time is the time spent actually looking at an ad and, an immersive cinema ad will be greater than snatched glances given to digital ads. Currently there is no way to quantify these differences, which leads to the assumption that all media are equal. But they are not.

We took a real close look at it

Brightfish commissioned eye tracking researchers in Belgium and the UK to investigate precisely this issue. The key question we posed was this: What is the likelihood to actually engage with viewable advertising across different media? Our hope was to be able to provide a common currency of attention across media and so help media planners evaluate the 'real reach' of different media.



**Source Lumen: Heatmap of eye-tracking on the website for National rail. Visitors of this page only engage with the content they came for, booking their ticket. Other content does receive overflow when eyes tend to wander. However, advertising, such as the banner on the top and to the side receive little or no attention at all.*

Methodology: eye tracking at scale

Profacts is a full-fledged market research agency, active in Belgium and abroad. Profacts was responsible for the eye tracking during consumption of ads in a cinema context and on TV. In both contexts mobile eye-trackers of SMI were used. An eye fixation is counted from the moment the eye fixates for more than 50ms. Based on that information the percentage of dwell time was calculated when ads were presented on a cinema or TV screen.

The field work for cinema was done in a real environment, not simulated and respondents were given a cover story before the preshow and ads started, to enjoy the movie as they normally would. This to not influence results when the ads were shown.

For TV, a similar approach was applied, respondents were tracked within their own home, and given a cover story which suggested that we wanted to track how people spend their evening activities. Respondents were free to do what they wanted to. Yet, only the data were analysed when ads were made available to them on their TV.

Lumen Research has been conducting large scale eye tracking projects in the UK for 5 years now. Since 2013 they have ran a weekly research project investigating how consumers read newspapers. This has provided them with attention data from 16.000 respondents exposed to over 7.000 in-context ad impressions. In 2016, they set up the world's first digital eye tracking panel: a continuous passive research project, investigating how people engage with advertising when on their home desktop computers. In the past two years, they have collected data from 766 respondents, and over 250.000 in-context ad impressions. These two datasets use the same definition of an eye fixation as the Belgian study, and were used to benchmark the data obtained by Profacts.

All the media under review have different viewability statistics. Getting reliable statistics on the real viewability of these different media was beyond the scope of this study, so we have concentrated on measuring the attention to technically viewable ads: ads that were served in viewable positions, or on pages that people read, or when people were in front of the TV or cinema screen. This allows us to compare like with like.

Findings

The eye tracking data reveals that there are significant differences in the likelihood to notice a viewable ad, and the quality of attention given ads in different media:

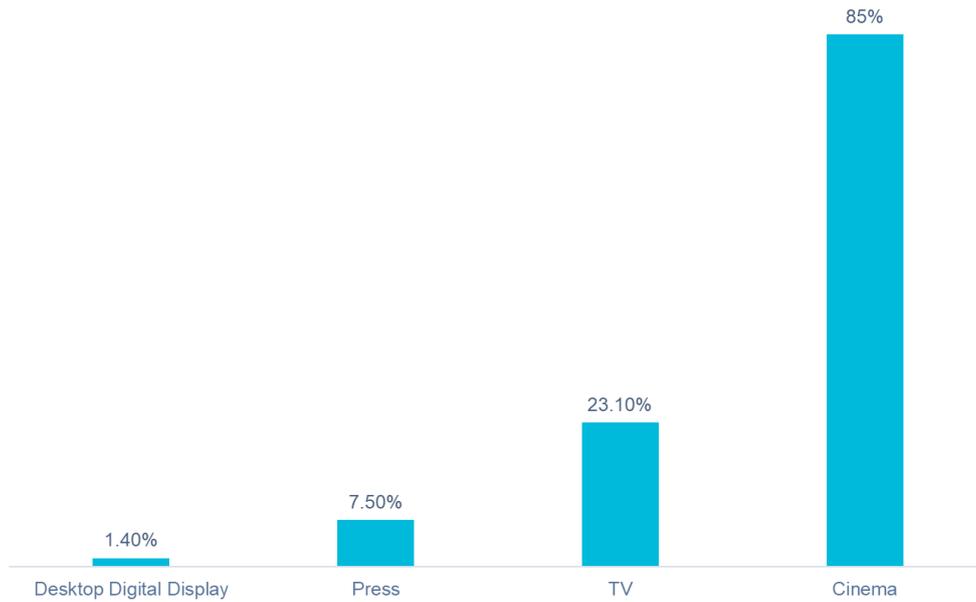
	Desktop Digital Display	Press	TV	Cinema
Average likelihood to see a viewable ad for at least 1 eye fixation	22%	76%	63.8%	100%
Average viewable time with ad (s)	21 sec	20 sec	30 sec	30 sec
Average dwell time with ad (s)	0.3. sec	1.5 sec	6.9 sec	25.5 sec
% of viewable time seen	1.4%	7.5%	23.1%	85%

The first challenge advertisers face is getting people to notice the ads. If an ad is served in a viewable position on a desktop computer, we found that consumers have a 22% chance of noticing the ad – meaning that they had at least one eye fixation on the ad. This also means that 78% of viewable digital advertising is entirely ignored. Following the same approach, if a reader turns the page of a newspaper and could see a print ad, then they have a 76% chance of noticing the ad. If someone is in the room while a TV ad is on, then they have an 64% chance of looking at the ad.

From eye fixation to real attention

Most advertisers would be disappointed if their advertising only received a single eye fixation. What is the average dwell time with ads across different media? Here there are also major differences between media. Only 22% of digital advertising receives at least one eye fixation with an average dwell time of 0.3seconds. Of course, there is a wide distribution in attention here: some ads and formats generate far more attention than others. But the average across all formats suggests that most digital advertising is only glanced at: only 1.4% of the time in which digital ads are viewable are actually looked at. Print ads get more attention – 76% of ads receive at least one eye fixation. And also the dwell time with an ad is longer at 1.5seconds. TV has a slightly lower likelihood to view an ad for at least one eye fixation at 63.8%, but receives more dwell time with an average of 6.9 seconds. Cinema ads, however, are highly immersive. Dwell time with a typical 30 second cinema ad was 25.5 seconds.

% of Viewable time seen

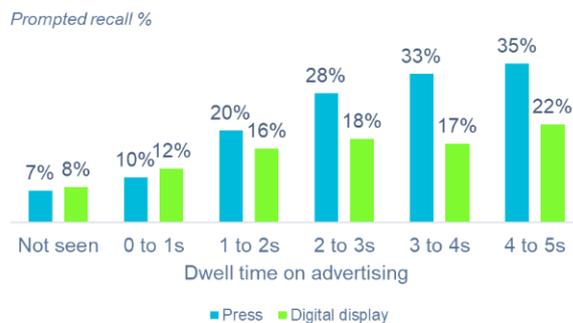


Attention leads to results

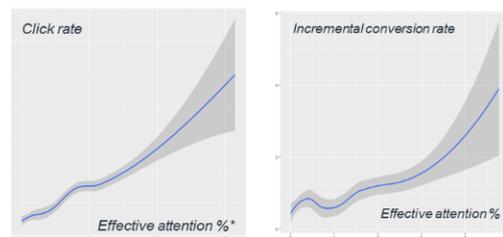
We also know that an increase in dwell time leads to other results. Lumen Research analysed the correlation between the time spent looking at an ad online and in press, and the effects in terms of recall and sales conversion. The results show an immediate correlation. These effects even increase when the dwell time increases. This suggests that the longer consumers are looking at ads, the stronger their recall will be of that ad and brand, but it will also influence their decision making. It's safe to say that advertisers profit from ads that are looked at longer, rather than those which are only glanced at.

We can conclude from the eye-tracking research that there is great variation between the different media in the percentage of the viewable time that is given to advertising. Around 1.4% of the time a digital ad could be seen is actually spent looking at the ad. 7.5% of the viewable time for print ads is actually spent with the ad. 23.1% of the time TV ads are available to be seen is spent engaging with them. And 85% of the time that people could see a cinema ad is spent looking at the cinema ad.

Attention leads to ad recall



Attention leads to sales



But how do these 'effective attention' levels relate to the cost of media? Instead of looking at the cost of a thousand *impressions* (CPM), what happens when we look at the cost per thousand *seconds of attention*? We call this Attention Cost Per Thousand, or aCPM. In other words aCPM is the cost for one second of effective attention per 1.000 contacts.

Sylvia Van Cauteren, Marketing Director at Brightfish: To calculate the aCPM, we took the latest Belgian Union of Media Agencies 15+ standard rate card CPM costs for digital ads bought direct, print ads, TV ads and Cinema ads. As digital ads bought programmatically is not available as a standard price by UMA, we used an average digital programmatic buying rate from a trustworthy source in the market. We then applied standard viewability rates to create a cost for a viewable impression on each of these media. We then applied the % viewing rate obtained from the eye tracking studies to calculate the likelihood that each impression would be seen, and how long it would be looked at given the time that an ad is typically viewable for (Lumen's research has shown that this is around 21 seconds for print ad, 22 seconds for digital. TV and cinema ads are viewable for the duration of the ad, which is typically 30 seconds).

	Cost per 000 (CPM)	Exposures	% Viewable	Viewable exposures	Cost per 000 viewable exposures (vCPM)	Av Viewable time (s)	% of viewable time seen	Av dwell time on viewable exposure (s)	Total audience dwell time (s)	Cost per 000 seconds dwell time (aCPM)
TV	€ 21.20	1.000	100%	1.000	€ 21.20	30	23.1%	6.9	6.930	€3.06
Cinema	€ 66.80	1.000	100%	1.000	€ 66.80	30	85%	25.5	25.500	€2.6
Digital - direct	€ 12.50	1.000	67.9%*	679	€18.4	21	1.4%	0.3	200	€62.6
Digital - programmatic	€ 1.13	1.000	59.8%*	598	€1.9	21	1.4%	0.3	176	€6.4
Press	€ 25.30	1.000	100%	1.000	€ 25.30	20	7.5%	1.5	1.500	€16.9

* Global Desktop Viewable % from IAS H2 2017 Media Quality report

The calculations are revealing. At a CPM level, TV and Cinema look expensive in comparison to digital, whether it is bought direct or programmatically. Even when we start taking viewability into consideration, programmatic digital advertising still seems to be significantly cheaper than all other media. However, once you start calculating the actual attention ads in these media receive, the situation is reversed. On an aCPM basis, the most 'expensive' media, Cinema - suddenly is surprisingly affordable. And 'cheap' media, such as programmatic digital are in fact fairly expensive. Traditional online ads are 24 times more expensive than cinema, and even programmatic ads, which were believed to be untouchable in terms of price, are 2.5 times more expensive.

Conclusion

Calculating the aCPM for different media creates a common currency of attention, allowing media planners to understand what they are really getting from each channel. Agencies often say that they are interested in 'buying eyeballs'. Up until now, they have had to use 'opportunity to see' as a proxy for this. Eye tracking allows us to measure what really matters: attention itself.

Addendum

Sources

- All eye tracking data for Print and Online: Lumen Research
- All eye tracking data for TV and Cinema: Profacts
- UMA CPM (15+):
 - http://www.uma.be/nl/costs_evolution_nl.php
 - http://www.uma.be/fr/costs_evolution_fr.php
- Online Viewability standards :
 - Global Desktop Viewable % from IAS H2 2017 Media Quality report

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