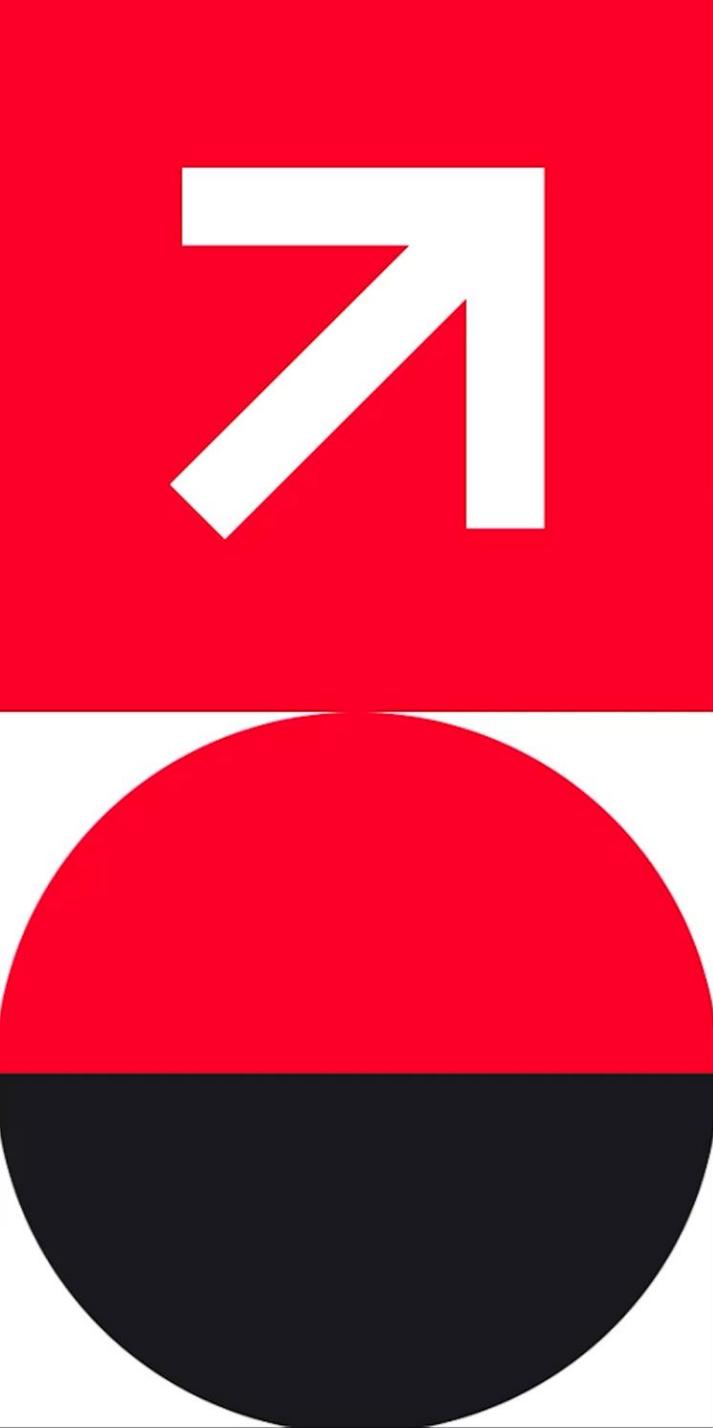


**THE BROADCAST,
UNIVERSE, THE
ATTENTION LEADER**



STATEMENT

01

A new challenge for advertisers:
Capturing attention

02

As video consumption and media buying become increasingly fragmented, so too is consumer attention.

03

The average consumer is exposed to over 1200 advertising stimuli / day. This makes it increasingly difficult for brands to stand out and capture the public's attention.

04

Today, attention is often measured by Kpis such as visibility and completion, on digital campaigns.



OBJECTIVES

01

The issue of attention was originally more of a problem for digital players, with TV being less challenged on the subject.

02

If capturing attention is an essential objective for any TV or video ad, memorizing the brand message is just as crucial.

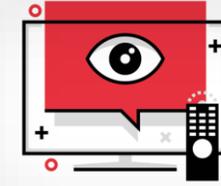
03

Beyond visibility and completion KPIs, attention is an increasingly used and complementary metric to measure the media performance of video campaigns.

04

The SNPTV, in partnership with the Mediamento institute and Xpln.ai technology, is carrying out an ambitious study to measure the attention paid to advertising within the video ecosystem (linear and non-linear, all types of screens, all types of media).

LINEAR TV AND CTV ON TV SCREEN



TV LINEAR and CTV



Institute founded in 2009

- ▶ Institute for Cognitive Studies in Media and Advertising
- ▶ Specialist in behavioral measures of memorization and advertising attention



Dorothee Rieu

CEO and founder of the Mediamento Institute Doctor in Neuroscience



DIGITAL VIDEO SECTION



DIGITAL VIDEO

 **xpln.ai**

Since September 2022

- ▶ Advertising attention measurement and optimization solutions
- ▶ Measure and predict in real time the quality of digital message exposure



Fabien Magalon

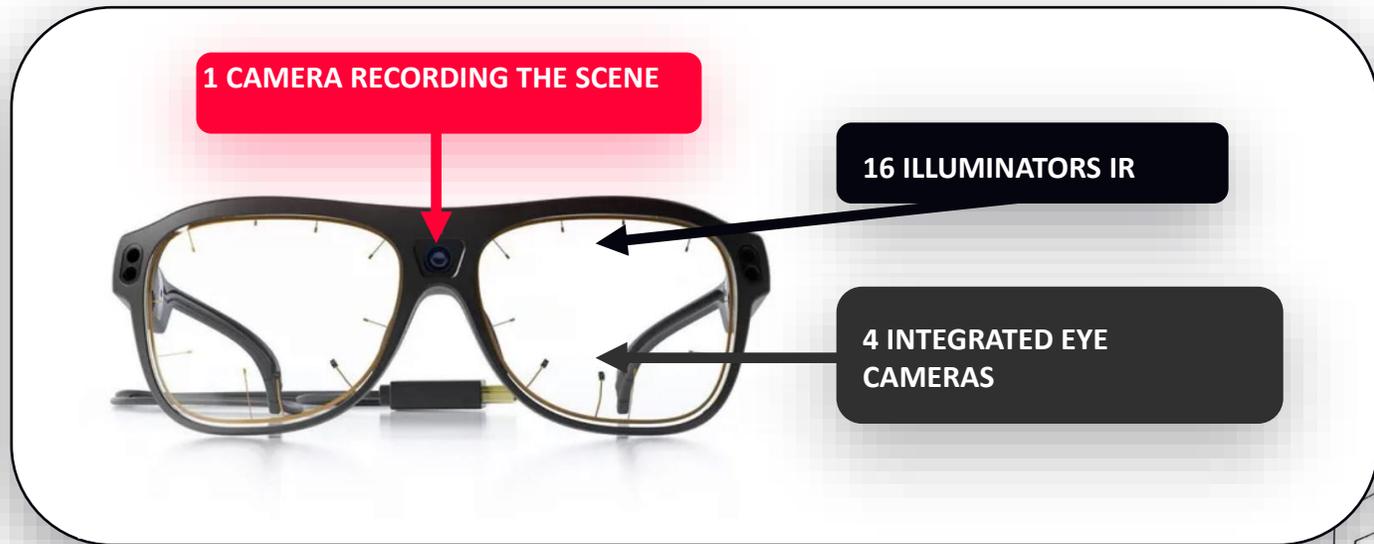
Co-fondateur of Xpln.Ai



LINEAR TV AND CTV



EYE-TRACKING, INFRA-RED GLASSES, FOR LINEAR TV, CTV, ON THE LIVING ROOM SCREEN



Linear TV: 25' viewing of TV programs with commercial breaks, followed by a questionnaire.

CTV: 35' viewing of programs on BVOD & Youtube, with advertising pre-rolls

EYE-TRACKING GLASSES



TV SET

MOBILE
MAGAZINES

LINEAR TV PROTOCOL

SAMPLE

FIELD

November 3 to 9, 2023

60 PEOPLE

AGE

33% of 18-34 years old

33% of 35-49 years old

33% of 50-65 years old

SEX

50% Male

50% Female

SPC

50% SPC+

50% SPC-

SCOPE

AD TV BREAK:

48 video montages

Screen of 8/ 12 / 16 spots

16 spots in 15'' / 20'' / 30'' format

15 sectors represented :

Automotive, Banking, Insurance, Men's Fragrance, Women's Fragrance, Telecoms, Pharmaceuticals, Energy suppliers, Food superstores, Pureplayer delivery, Pureplayer Travel, Leisure Park, Specialized Distribution, Hygiene/Beauty
FMCG

Sponsorship :

17 types of Billboards

Choice of program from : Nazca/RMC Décou., EDG/La chaîne L'Equipe, Canal Foot.Club/C+, NOPLP/F2, TPMP/C8, C'est à Vous/F5, Top Chef/M6, Qui Veut Être mon Associé/M6, Koh Lanta/TF1, HPI/TF1

INDICATORS

AD TV BREAK:

- Attention span in seconds
- Video Attention Ratio (V.A.R.) in % = duration of attention paid to ad / copy duration
- Spontaneous recall
- Assisted memorization

BILLBOARDS :

Video Attention Ratio (V.A.R.)

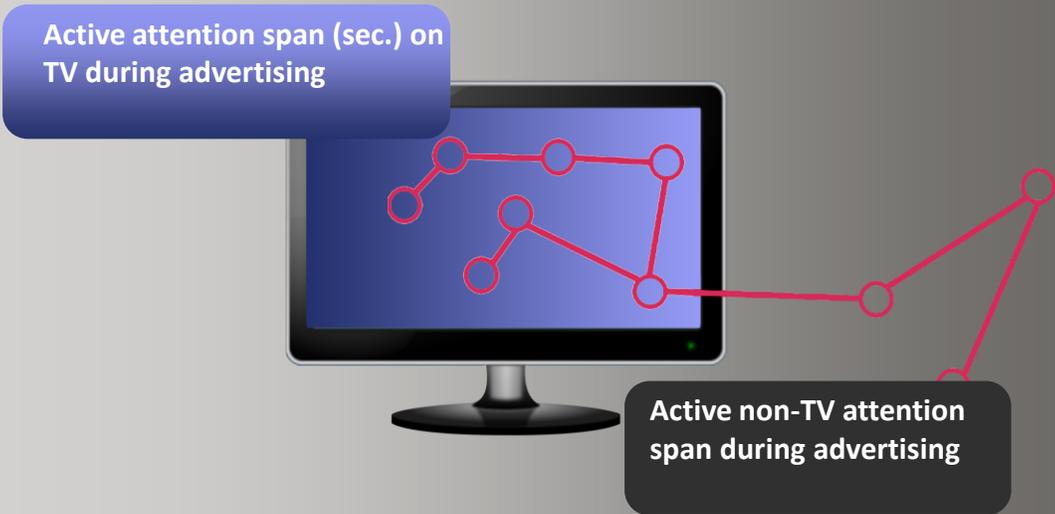
MEdiaMENTO

SNP TV
SYNDICAT NATIONAL DE LA PUBLICITE TELEVISUELLE

LINEAR TV PROTOCOL

ATTENTION SCORE

- ▶ Active attention span (sec.) on TV during advertising
- ▶ Active non-TV attention span during advertising



MEMORIZATION SCORE

- ▶ Percentage of people quoting from memory the brand names of advertisements seen :
Spontaneous recall
Aided recall

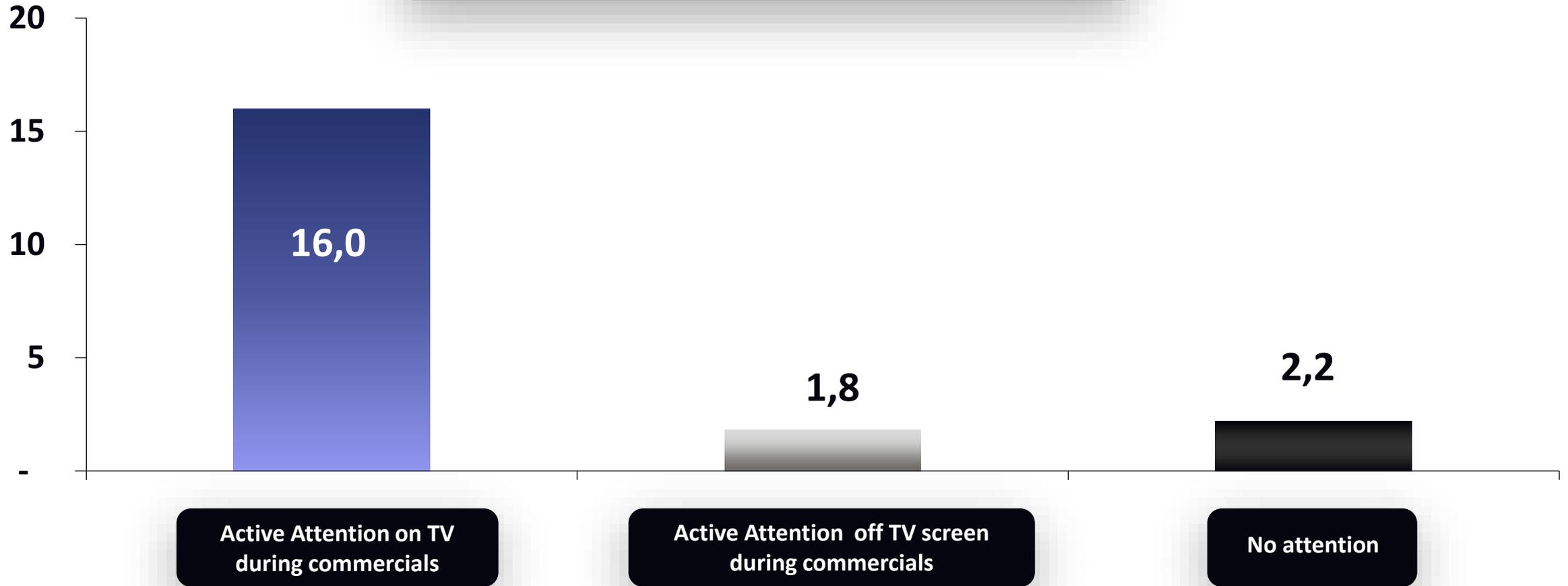


16" ACTIVE ATTENTION SPAN FOR TV ADS ...

TV LINEAR

(in secondes)

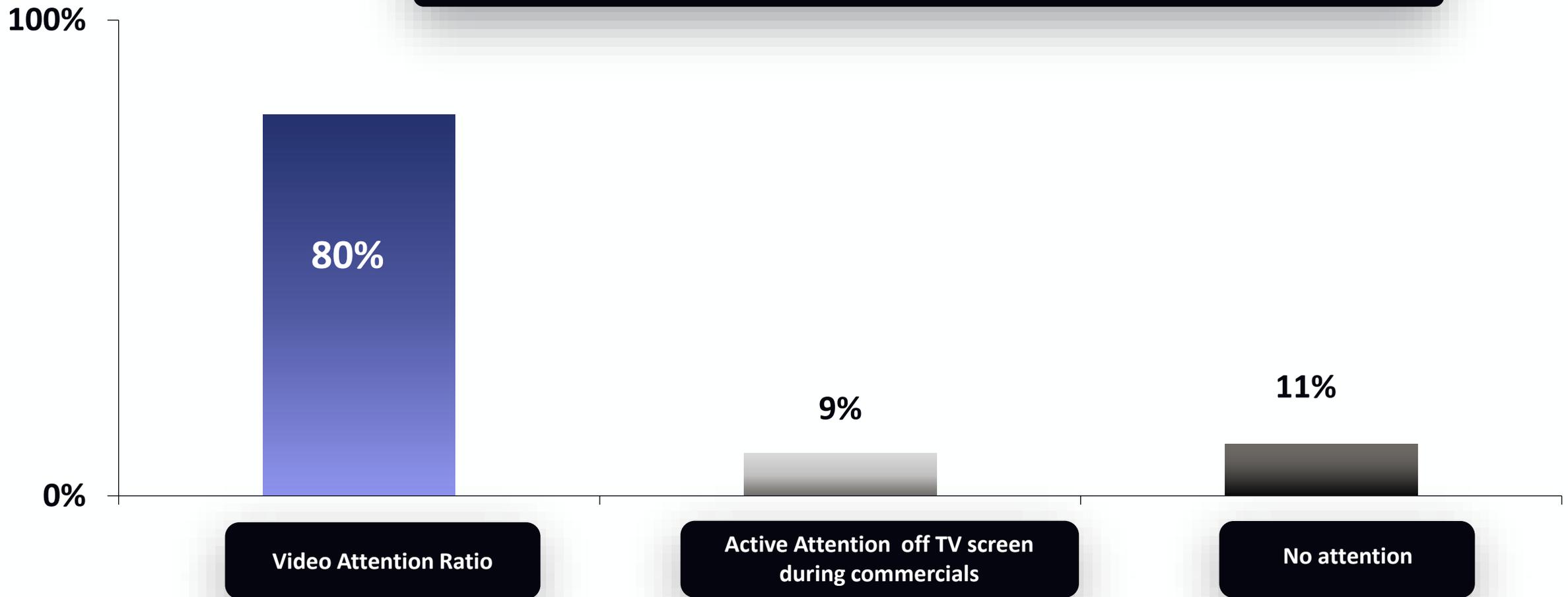
Active attention span TV ad reduced to a base of 20".



... OR 80% VIDEO ATTENTION RATIO (V.A.R.)

LINEAR TV

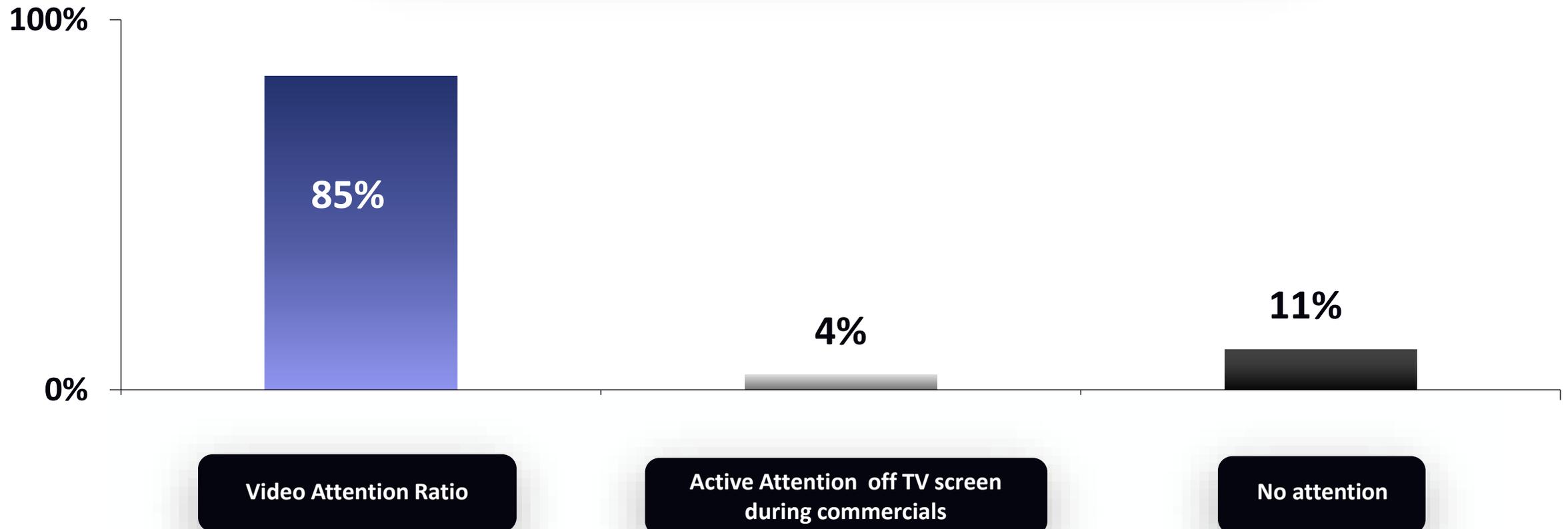
% Active attention span on TV ad / TV ad creation duration



AND 85% FOR THE BILLBOARDS

LINEAR TV

% Attention span to B.B TV / duration of BB TV copy



KPIS LINEAR TV



Active attention span 16'' reduced to a base of 20''
I.e a V.A.R. of **80 %**



Video Attention Ratio is equivalent whatever the spot format:
80%-81%



19% spontaneous recall and **23%** for short screens
42% aided recall



Sponsorship outperformance: Billboard A.R.V. of **85%**

BVOD / YOUTUBE PROTOCOL ON CTV

SAMPLE

FIELD

July 3 to 6, 2023

35 PEOPLE

Matched according to:

AGE

33% of 18-34 years old

33% of 35-49 years old

33% of 50-65 years old

SEX

50% Male

50% Female

SPC

50% SPC+

50% SPC-

SCOPE

696 SPOTS TESTED

191 spots on historical channel X

321 spots on historical channel Y

184 Youtube spots

CONNECTED TV VIEWING OF A CHOICE OF BVOD AND YOUTUBE CONTENT

EACH PARTICIPANT HAD TO CHOOSE SEVERAL PROGRAMS ON A SMART TV TO WATCH IN SUCCESSION (IN DIFFERENT ORDER):

2 replay programs from one channel History X
→ max 10'

2 replay programs from one channel History Y
→ max 10'

3 to 4 Youtube programs → max 15 à 20'

INDICATORS

-VIDEO ATTENTION RATIO (V.A.R. IN %) =
Attention span to the ad / duration of copy

- V.A.R. POSITIVE: only for YT
= Attention span to content / duration of copy

- NEGATIVE ATTENTION

MEdiaMENTO

SNP TV
SYNDICAT NATIONAL DE LA PUBLICITE TELEVISUEE

ATTENTION SCORE

CTV

MEdiaMENTO

4 notions :

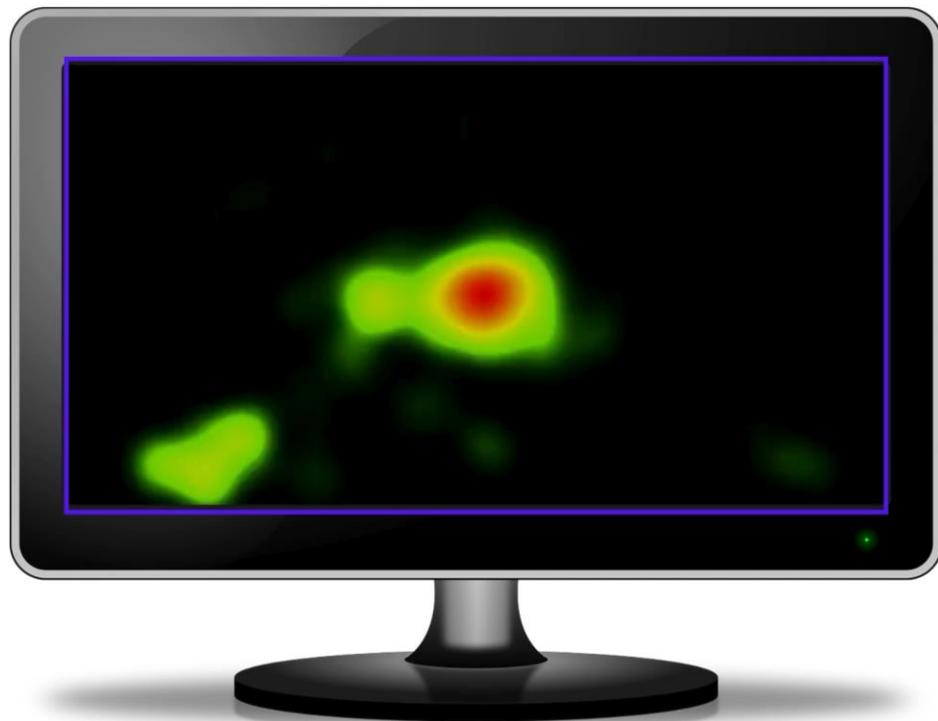
- ▶ Positive attention spans (sec.) on CTV during advertising
- ▶ Negative attention = rectangle on right
- ▶ Active attention span off CTV during advertising
- ▶ Video Attention Ratio: Active attention span / copy duration



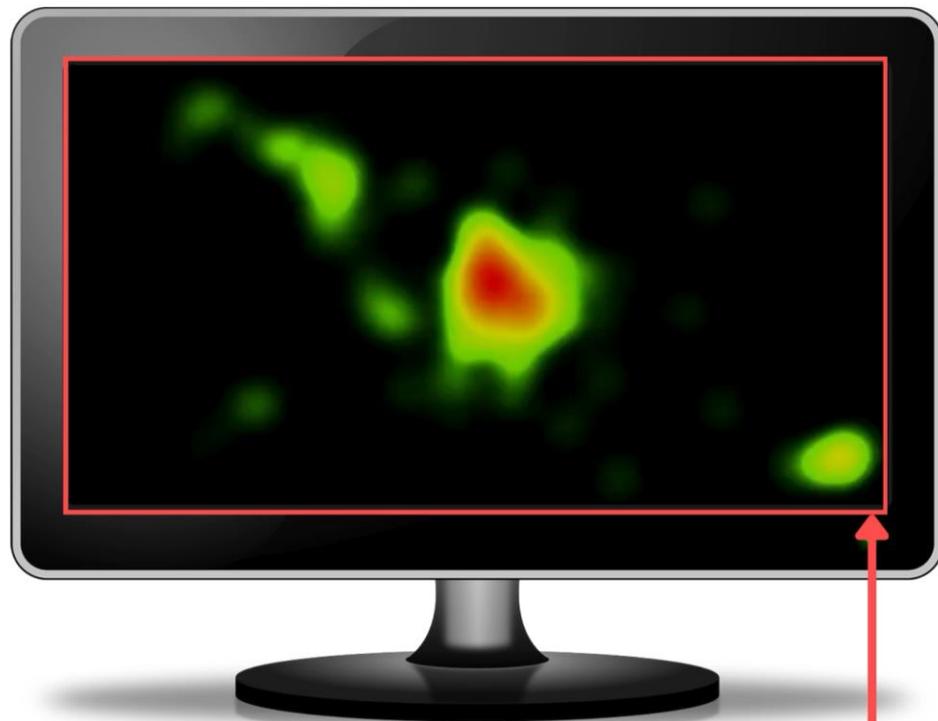
ADVERTISING ATTENTION ON CONNECTED

CTV

HEATMAP VIDÉO : MOMENTARY FIXATIONS DURING THE FIRST 20 SECONDS OF SPOT



BVOV – PREMIUM CONTENT FROM BROADCASTERS



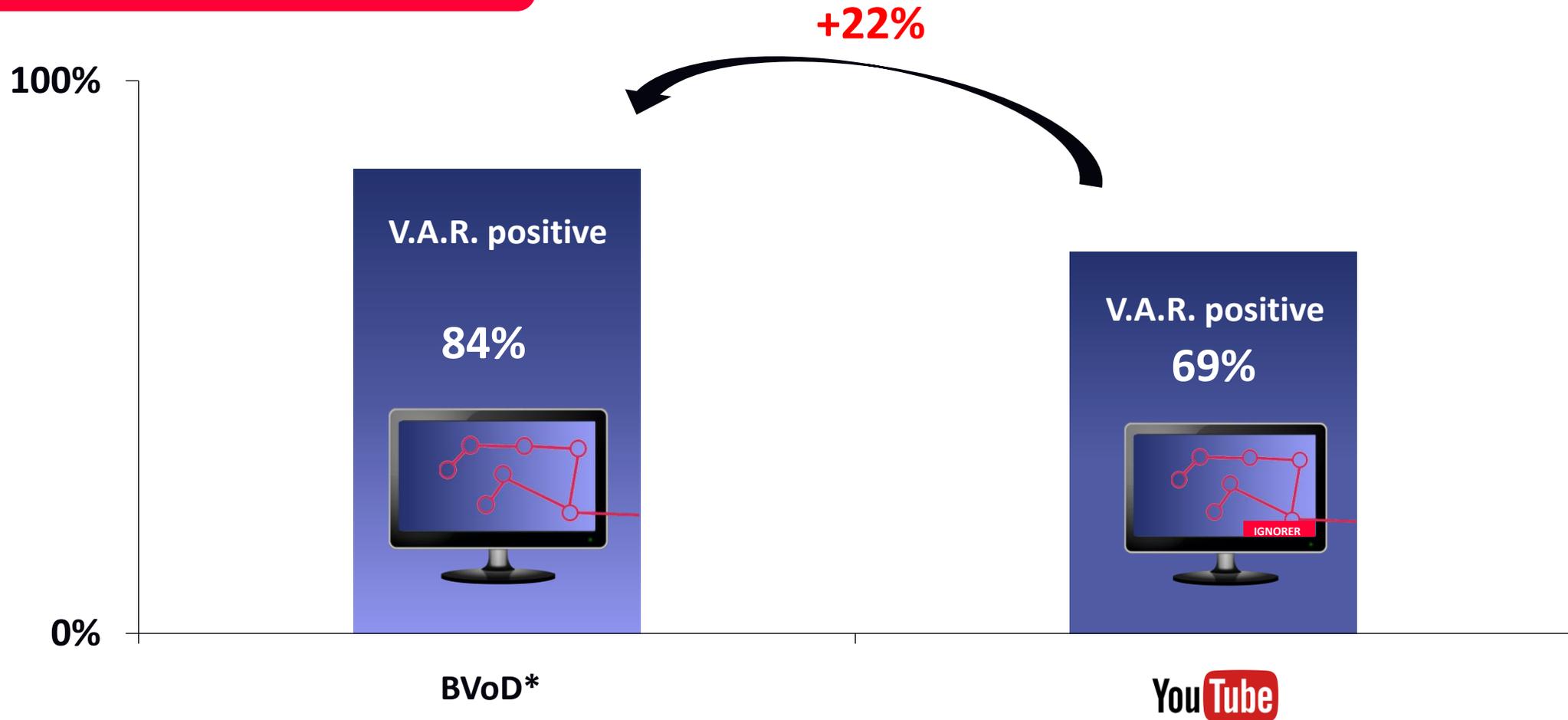
YOUTUBE

negative attention fixations on the ignore ad button

BVOD WIDELY AHEAD OF YOUTUBE

CTV

% POSITIVE ATTENTION DURATION ON CTV AD /
DURATION OF CTV AD COPY



*BVoD = Broadcasters Video on Demand



A POSITIVE VIDEO ATTENTION RATIO FOR BVOD OF **84%**.
VS **69%** FOR YOUTUBE (ALL FORMATS).

DIGITAL VIDEO SECTION

✂ xpln.ai

75%

Of advertisings
are "visible"

80%

Of videos
are "completed"

VISIBILITY AND COMPLETION

On their own, these indicators are no longer sufficient to accurately measure a campaign's media performance.

28%

Of ads are viewed
for more than 2 seconds

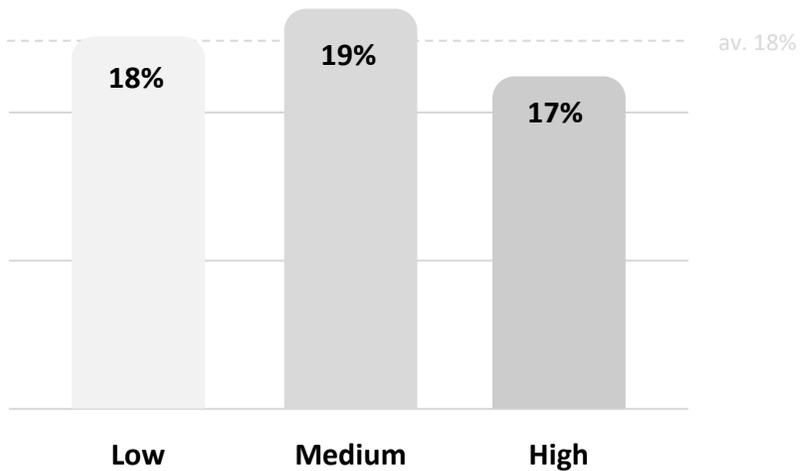
12%

Of ads are viewed
for more than 5 seconds

MEMORIZATION IS MORE CORRELATED TO ATTENTION THAN TO COMPLETION AND VISIBILITY

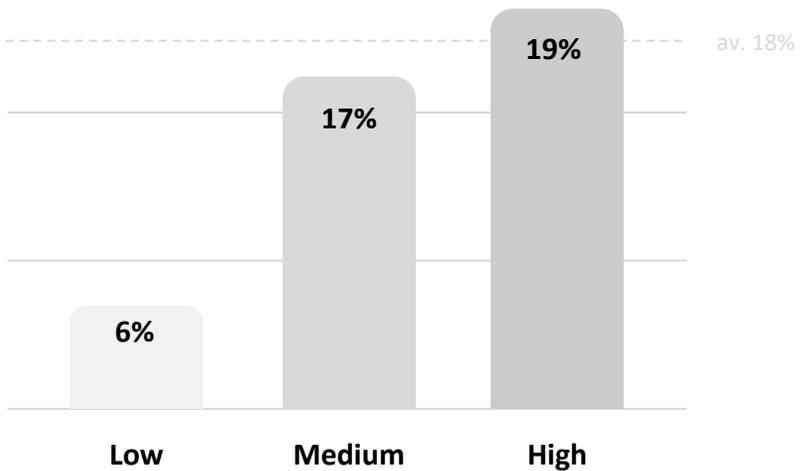
DIGITAL VIDEO

VISIBILITY



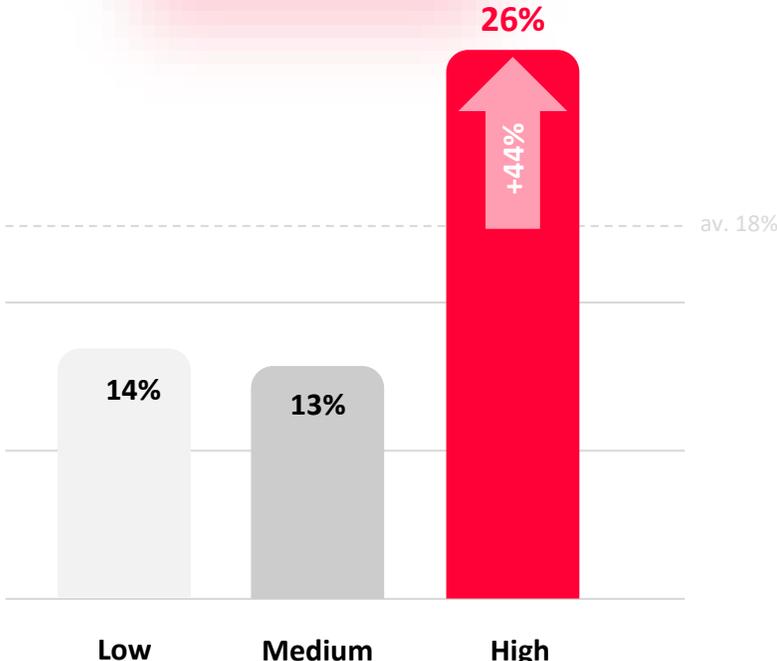
Less correlation between Visibility and Memory

COMPLETION



Less correlation between Completion and Memorization

ATTENTION



Strong CORRELATION BETWEEN Attention AND MEMORIZATION

DIGITAL VIDEO PROTOCOL

CAMPAIGNS TESTED

10 CAMPAIGNS



4 AGENCIES



10 MEDIA



250 MILLION

measured between 01/01 and 03/15/24

INDICATORS

Attention duration in seconds

Video Attention Rate (V.A.R.) in % = Duration of attention paid to ad / duration of text

SCOPE

VIDEO ONLY

ALL DEVICES: TV SCREEN, MOBILE/DESKTOP

DIFFERENT DURATION OF CREATIVES: 6", 10", 15", 20" - NORMALIZED ON A 20" BASIS



A BVoD ADVERTISING GENERATES ON AVERAGE

DIGITAL VIDEO

ALL DEVICES

15,2"

of attention

(or 76% of the duration of the video)"

Data normalized on the basis of a film duration of 20 seconds.

BVOD CAPTURES MORE ATTENTION THAN OTHER PLATFORMS

DIGITAL VIDEO

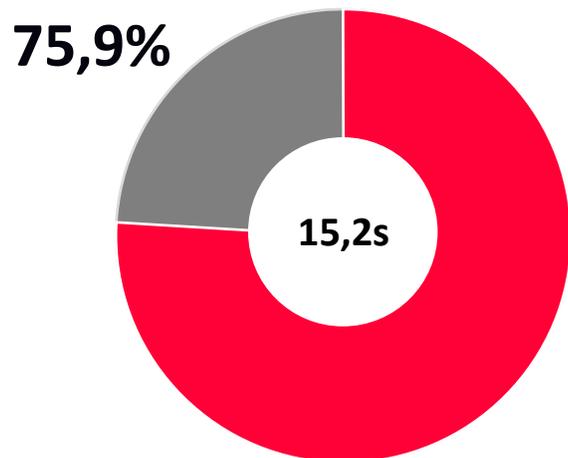


15.2" attention (based on 20" format) for an advertisement

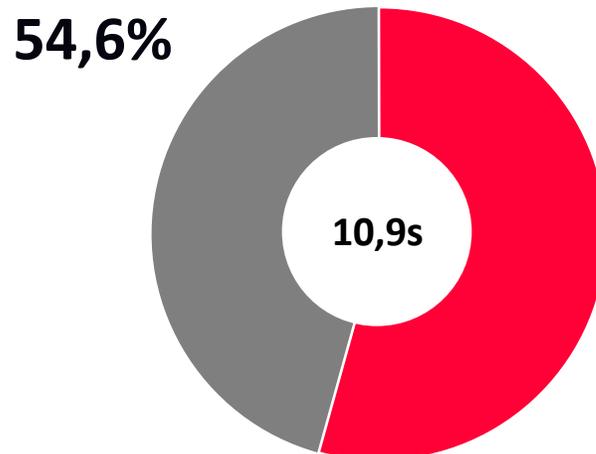
BVOD average of **76%**

ALL DEVICES

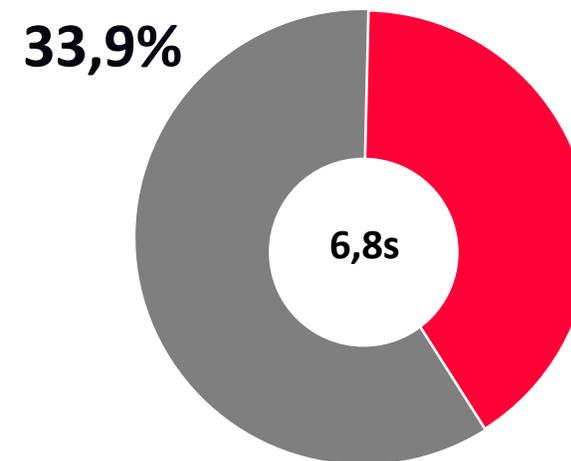
■ % No Attention ■ % Attention



BVoD*



OLVP*



Social Networks

Data normalized on the basis of a film duration of 20 seconds.

*BVoD = Broadcasters Video on Demand / OLVP = Online Video Platform



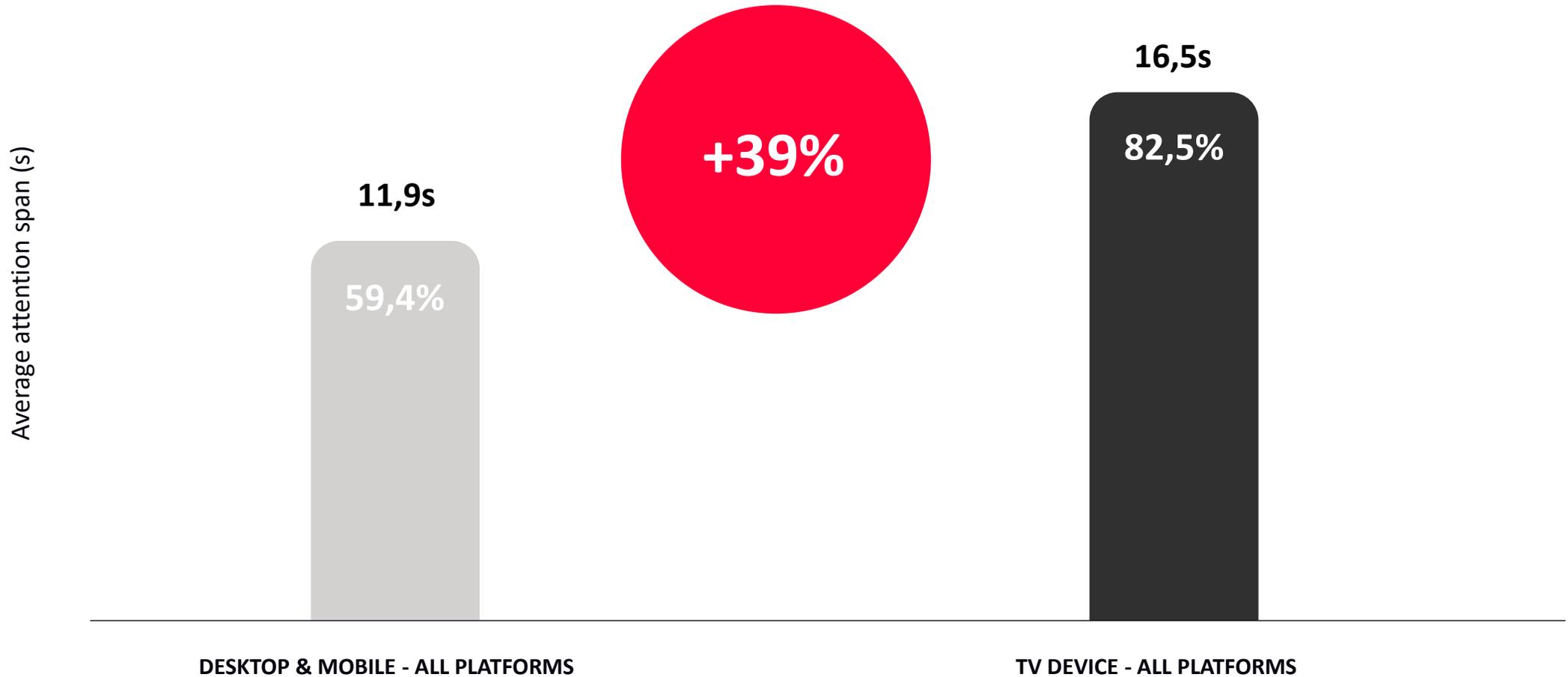
**BVOD CAPTURES MORE ATTENTION THAN
OTHER PLATFORMS**

DIGITAL VIDEO

How?

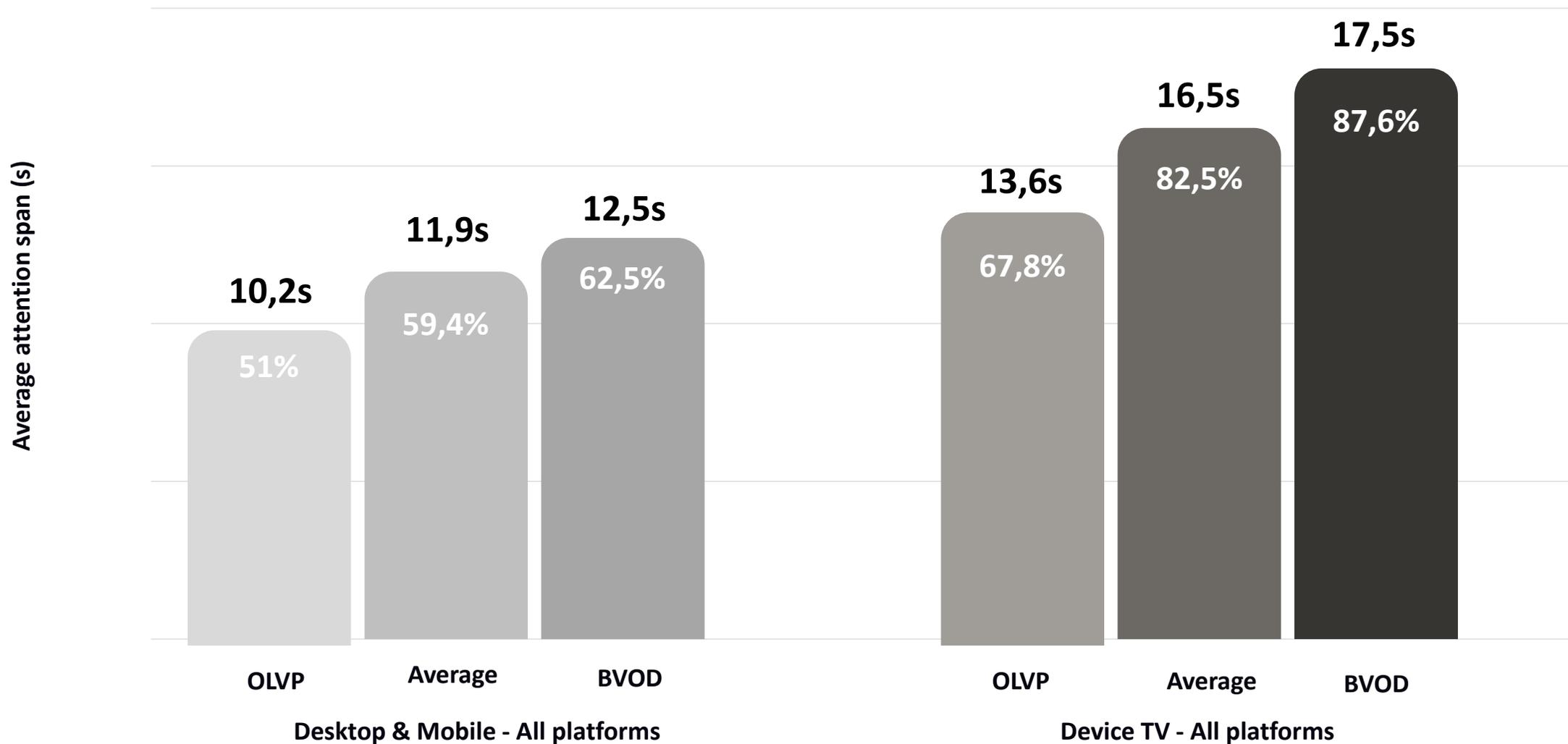
THE TV DEVICE ATTRACTS MORE ATTENTION THAN OTHER DEVICES

DIGITAL VIDEO



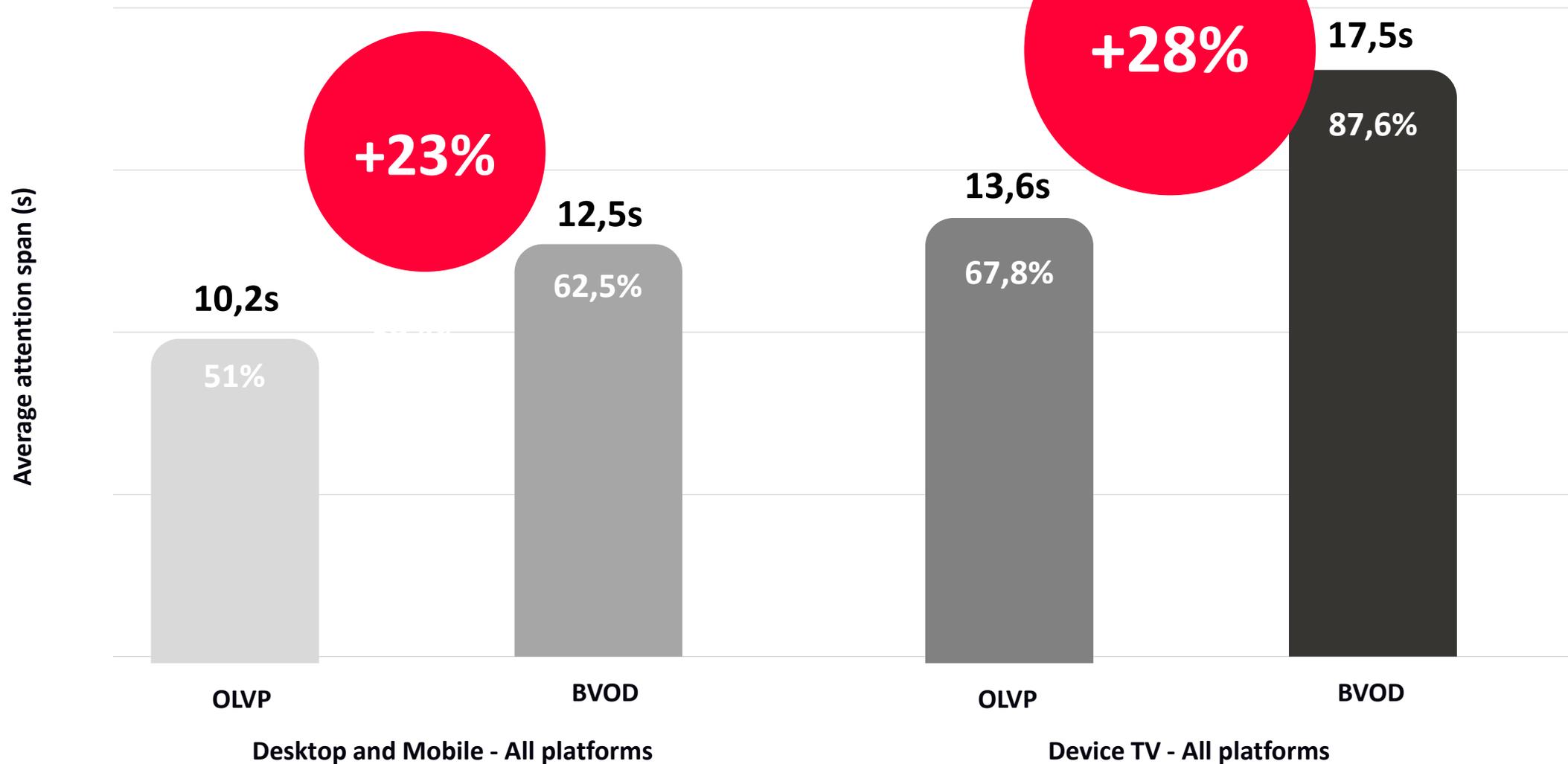
THE CONTENT WILL INFLUENCE ATTENTION

DIGITAL VIDEO



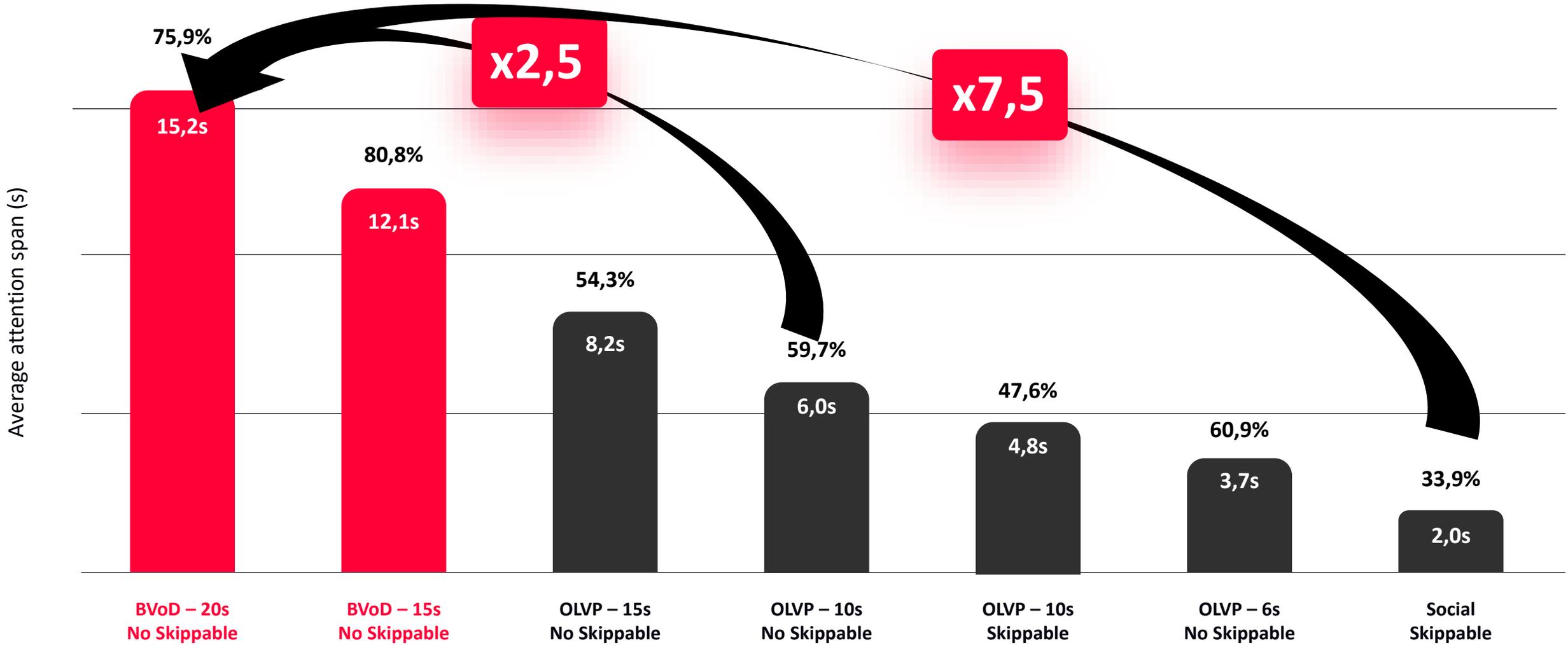
THE CONTENT WILL INFLUENCE ATTENTION

DIGITAL VIDEO



THE BVOD LEADER IN THE VIDEO ECOSYSTEM

DIGITAL VIDEO



*BVoD = Broadcasters Video on Demand / OLVP = Online Video Platform

KPIS DIGITAL VIDEO



Active attention span 15,2 '' reduced to a base of 20 ''
76% video Attention Ratio for BVoD vs 55% for video platforms, and 34% for social networks.



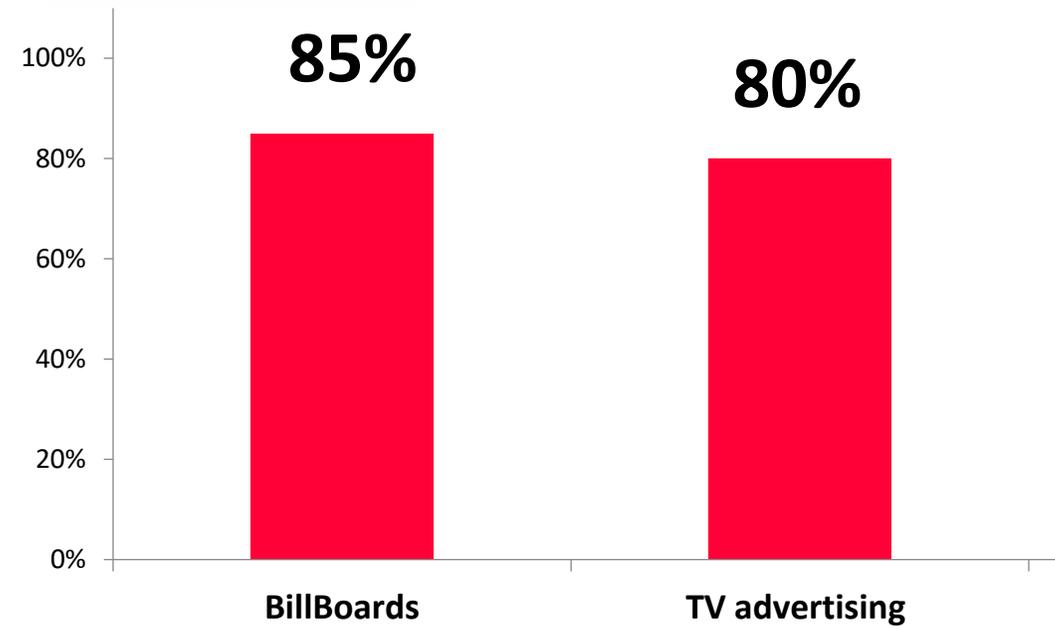
The attention rate is maximized by broadcasting on the TV device: 83%



BVoD content quality boosts attention spans, whatever the device: TV, Desktop or Mobile

IN SUMMARY: V.A.R. IN %

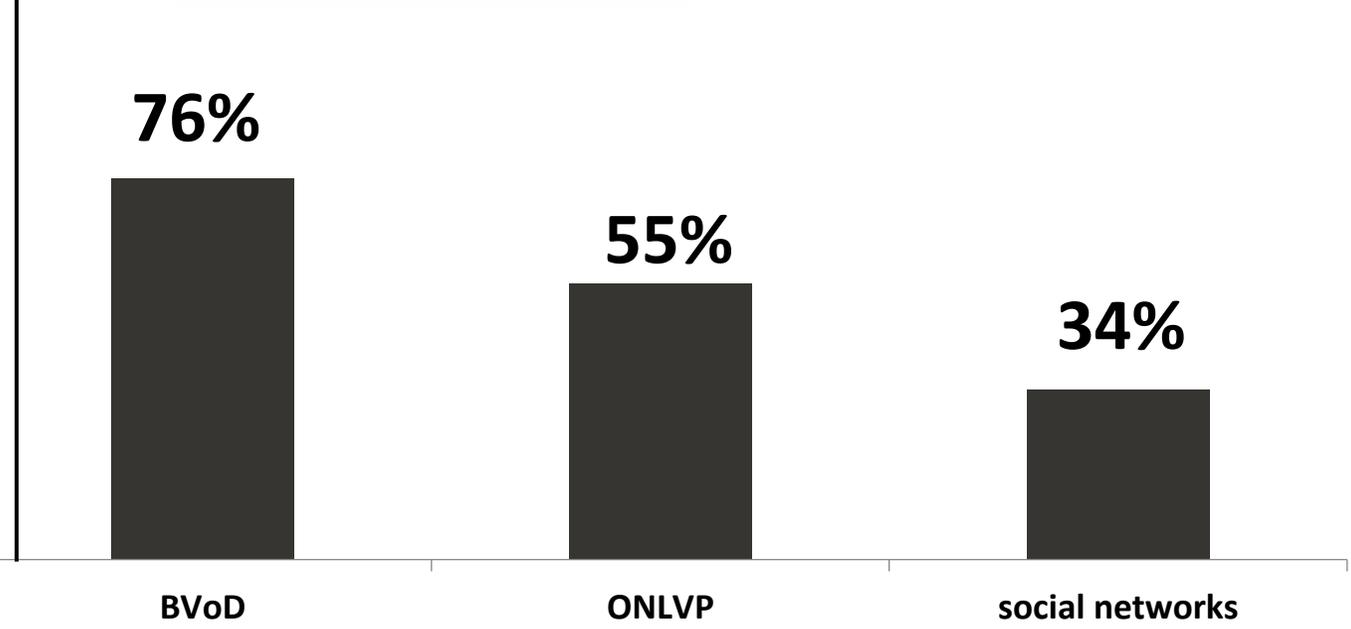
TV *MEdiaMENTO*



LINEAR ALL FORMATS

DIGITAL VIDEO

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DIGITAL VIDEO ALL FORMATS

BVoD = Broadcasters Video on Demand / OLVP = Online Video Platform