# Introducing the Attention Economy

Dentsu Japan International Brands Attention Economy Program
Phase 1 Research

dentsu

AE THE ATTENTION ECONOMY

# INTRODUCTION

As the world's fourth-largest economy, Japan's advertising landscape is evolving rapidly, with annual advertising expenditure reaching a substantial $53.83B in 2024. Advertisers now have an unprecedented opportunity to engage with over 120 million Japanese consumers, who hold significant sway over marketing outcomes, ranging from brand awareness to performance-based metrics. In a country where over 50% of the population lives in an urban area, it is estimated that the average Japanese individual encounters around 10,000 advertisements daily—whether through television, mobile devices, or the neon-lit streets that characterize the vibrant urban centers such as Tokyo and Osaka.

The democratization of paid media and new platforms, such as OTT (over-the-top media services), audio streaming, and gaming, have ushered in a wave of advertising innovations. Brands increasingly intensify their advertising efforts to capture consumer attention across diverse channels. However, this surge in advertising has led to a saturation of the market, making consumers more resistant to digital advertisements. Year over year, there's been a steady increase in consumers deploying ad blockers to end the unpleasant experience of being bombarded with ads.

Compounding this shift is the decline of terrestrial television, a medium that has traditionally dominated the Japanese market. Despite its broad reach and high-level credibility, TV viewership is experiencing a steady decline, challenging brands to rethink their media strategies. In 2021, digital advertising spend in Japan surpassed traditional advertising expenditures for the first time, signaling a pivotal shift. Today, even TV-centric brands must adapt to a digital-first approach to measure the impact of their marketing efforts effectively.

This transformation raises critical questions for brands aiming to thrive in this new digital era:

- How does the total attention brands buy in media plans compare to the individual loss of TV ratings?
- What is the optimal frequency for digital media online video (OLV) to achieve the same impact as a traditional 15 or 30-second TV spot?
- In a multi-device environment, where is consumer attention headed?
- How do creative elements contribute to the attention and effectiveness of OLV?
- What is the relationship between attention, creative execution, ad recall or volume response?
- How can brands transition to attention-based media planning?

These questions form the cornerstone of this research paper, delving into the evolving dynamics of the Japanese advertising industry and offering insights into how brands can navigate and succeed in this increasingly digital world.



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# THE CURRENT SITUATION

In the evolving landscape of Japanese advertising, traditional cosmetic KPIs like view-through rate or reach are increasingly inadequate in gauging the effectiveness of a brand's media activities on brand uplift or sales. Historically, media planning has often operated on the flawed assumption that all impressions hold equal value. This perspective fails to account for the significant variations in cost and impact between different media platforms—be it television, in-feed social media, or pre-roll video ads.

The current media planning paradigm tends to overlook the nuances of impression quality. For instance, within the same channel, impressions are often priced uniformly, irrespective of the actual engagement duration. Moreover, there is a prevalent misconception that data-driven targeting alone can supersede the importance of high-quality creative content. This belief, however, is a fallacy.

Such thinking has led brands to prioritize "reach" over meaningful engagement, driven by the goal of achieving more with less financial investment. This approach, while seemingly efficient, is no longer sustainable for advertisers, agencies, or media owners. The industry has become complacent leading to consumer's negative attitudes toward advertising. Efficiency, though critical, must not overshadow the pursuit of effectiveness in advertising strategies and consumer experiences.

Creative itself, the major driver of effectiveness, is too often unaddressed. Ads are tasked with working across a wide range of media experiences: scroll, skip, swipe. Huge deficits in effectiveness arise when ads are not optimized to their intended environment. A wise six-figure media investment can be written off as waste if the creative does not pull its weight.

To address these challenges, Japan's advertising industry needs a fundamental shift in approach. This research paper explores the necessity for a new media planning framework that prioritizes effectiveness over mere efficiency, advocating for a deeper understanding of impression quality and the vital role of creative excellence.
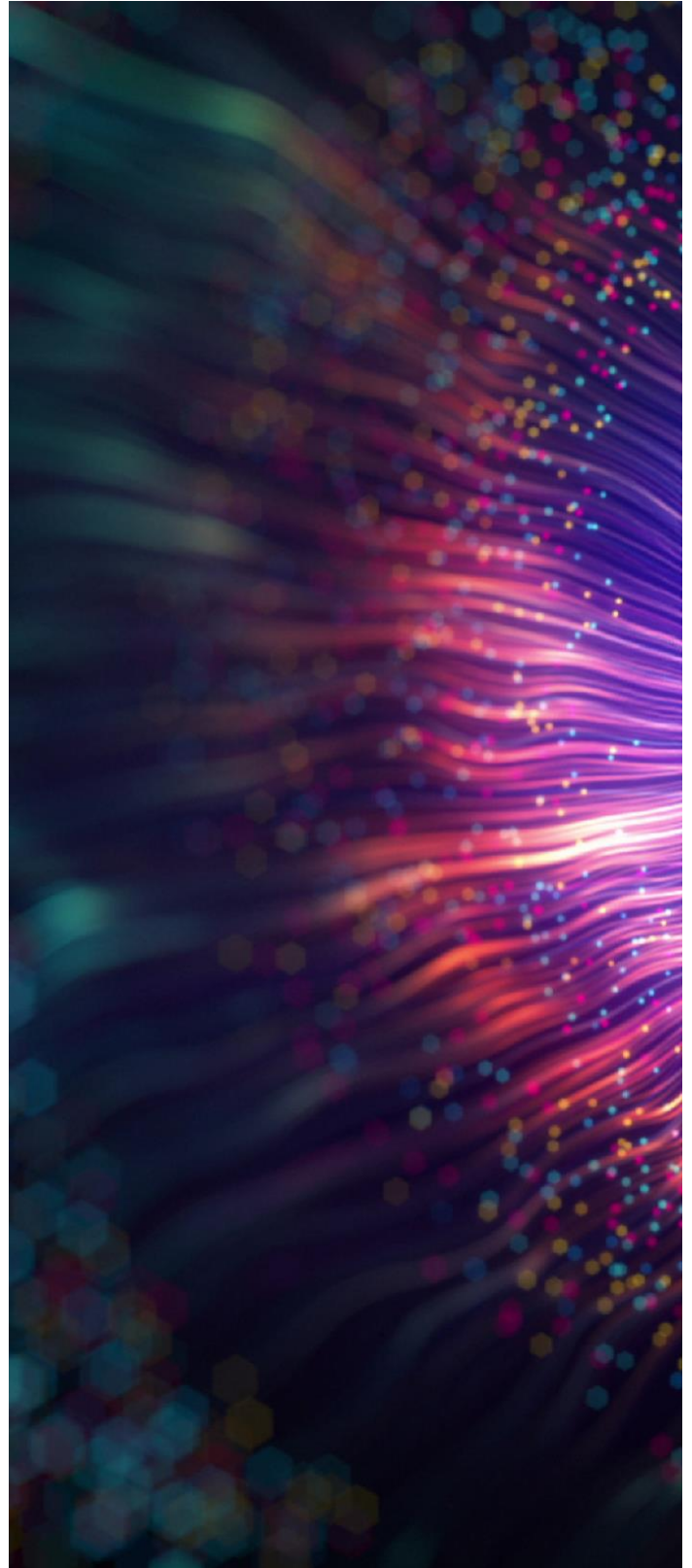
# INTRODUCING THE ATTENTION ECONOMY

In 2019, dentsu US introduced the "Attention Economy". The goal was to develop an industry-leading research program built and run by our Global Media Partnerships teams, supported by some of the world's biggest media owners, and delivered by academic experts in this field.

Using the latest eye-tracking technology, dentsu US undertook a three-stage research approach – where they were able to:

*"We want to help brands understand the value of their media investment in a fragmented digital landscape"*

Seeing the initial Attention Economy results and impact on our teams and clients in the US, the case was clear. It was time to bring attention to the economy of Japan. At dentsu Japan International Brands, we want to help our brands understand the value of their media investment in a more consistent context in a fragmented and confusing digital landscape.

This was a natural and necessary next step in the Japanese marketing industry. Together with leading advertisers and media owners, dentsu Japan International Brands is leading the change and actively investing in finding a solution. We aimed to define a new value system and ultimately challenge how the industry trades by valuing what is likely to be 'achieved' over what is 'bought'. Value is not only measured by media metrics but also goes beyond and can be measured as marketing and even business values.



## Understand the reality of mobile attention in Japan

**DEFINE -** Defined what "attention" means, what factors affect it and how this drives engagement, brand uplift and sales

**MEASURE -** Provided a measure with which to begin planning, and ultimately buying on attention

**VALUE -** Brought objectivity to the way attention is valued across platforms, channels and formats

**PLAN -** Ingested this data into our planning systems

**BUY -** Worked with our partners, clients and competitors to drive the debate on the trading of attention

Now after three years of work and research, we're excited to announce that the Attention Economy has arrived in Japan. We're happy to be able to share the results. This research is a 'world first' in tracking mobile attention in the Japanese market.

This study, part of the ongoing series feeding into the dentsu Attention Economy project, aims to understand the reality of mobile attention in Japan.
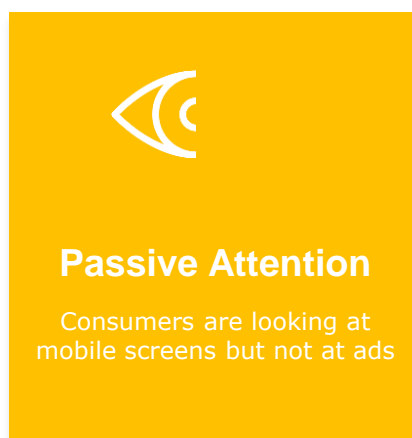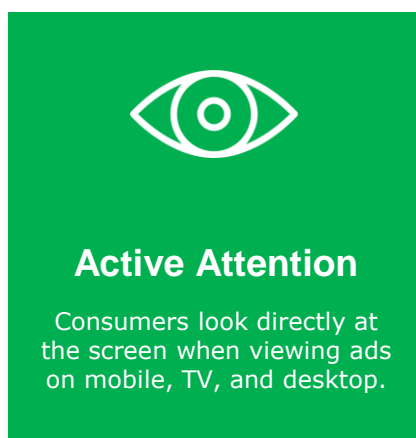
# WHAT IS ATTENTION?

Before presenting the results of our research, it is essential to define "attention" within the context of this project. Attention can be categorized into three types: active, passive, and non-attention. In its simplest form, active attention occurs when the consumer is directly looking at the screen, their mobile device is facing up, and the majority, if not the entirety, of the screen is visible.

Drawing upon the definitions of "attention" and findings from previous "Attention Economy" studies conducted in other markets, we formulated two hypotheses for our research in Japan:

1. If someone cannot look directly at an ad, it cannot have an effect.
2. If someone looks at an ad more or for longer, it will have a greater effect.

To address these questions, we determined that leveraging the latest eye-tracking technology would enable us to collect three principal datasets. We monitored individuals' eye-gaze behavior during media consumption by conducting unobtrusive, controlled panel experiments. We correlated these measurements with outcomes by inviting participants to complete surveys and gaining insights into the relationship between attention levels and ad effectiveness.

Additionally, we would collect detailed viewability data for all ads served, including metrics such as screen coverage, the percentage of pixels on the screen, and the percentage of the ad played.

## Active Attention
Consumers look directly at the screen when viewing ads on mobile, TV, and desktop.

## Passive Attention
Consumers are looking at mobile screens but not at ads

## Non-Attention
Consumers are not looking at the screen or the ads.

In terms of application, we wanted to use our findings and apply them to three core questions:

1. Can we develop an attention model that more accurately predicts the real opportunity for communication, transitioning from "opportunity to see" to "probability of having seen"?
2. Can such a model be utilized to identify new methodologies for valuing different platforms and formats?
3. Can we reassess the value of impressions to facilitate a more balanced budget allocation across platforms, thereby enhancing ad effectiveness?

As part of the ongoing series of studies feeding into the dentsu Attention Economy project, this study intended to understand the reality of mobile attention in Japan. Reflecting the nuances of:

1. A non-Latinate language which uses both pictographs and multiple scripts
2. A stronger preference for vertical top-to-bottom text than other markets
3. Localized webpage formats, global and local video platforms, and social media platforms contrast to those in Western markets.
4. Japanese expressions and physical reactions (using algos trained by Japanese annotators on Japanese faces.)

# THE METHODOLOGY

- Ads were served in highly realistic environments.

- Research partners created a series of highly realistic simulated environments for each channel. These were interactive and allowed the respondent to navigate freely around the page/environment on their mobile device.

- Eye tracking / Vision AI software was then integrated into the environments, allowing the respondents' attention to be captured and linked to the ad elements appearing on the screen.

- Lumen Research recruited 1,841 adults aged 18 and over who were regular users of the platform, to whom 4,472 impressions were served. Of this sample, 1,103 respondents were deemed to have high accuracy and precision data for eye tracking analysis.

- Realeyes recruited 7,374 participants who met the brand's target audience criteria (e.g., F 25-54) and yielded high-quality data. For each participant, they captured attention, reactions (such as smiles), recall, and brand metrics.

- For each participant, we will go through three main stages, including

  - Recruitment and demographics to ensure the participant matches our target audience criteria and is aligned with privacy requirements
  - Ad exposure in a relevant context
  - Impact of Exposure Survey

- In this research, we categorized our ad format as follows:

  - **Standard Display/ Display** - the display ad format by using static image asset and adopting the majority of IAB size in the open-web environment
  - **Rich Media Display/ In Article** - the display ad format by adopting the dynamic image asset in the open-web environment
  - **Rich Media Video/ In Article** - the display ad format by adopting the video asset in the open-web environment
  - **Instream Video/ Instream -** the video asset, including non-skippable and skippable, to be shown in the on-demand video platform
  - **Social -** the image/ video assets to be shown the social media platform as native-like ad format
  - **Live Streaming -** the video asset to be shown in the video platform which is dedicated to live streaming feature
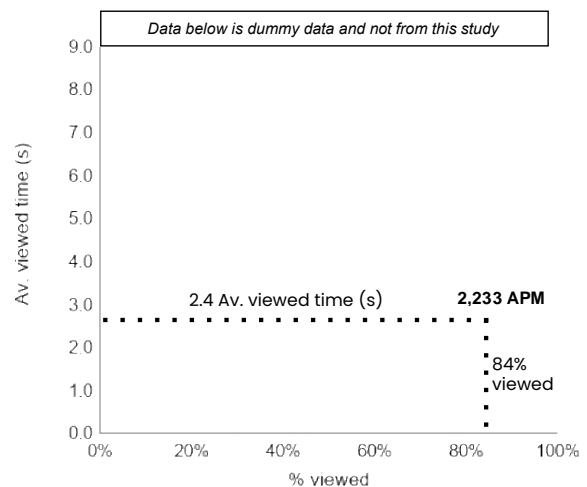
**How we calculate attention:**

Attention per mile (APM)
This composite metric helps us understand the true power of advertising to deliver 'eyeballs' for advertisers. It can be used as a single metric to assess inventory quality across media channels.

Calculation
% viewed X av. viewed time X 1000 = APM

# VIEWABLITY IS NOT AN INDICATOR OF ATTENTION

The chart (Fig. 1) critically analyzes viewability versus genuine attention, highlighting a significant disparity between these metrics.

This stark contrast indicates that although ads may be visible on screen, they do not necessarily capture viewer attention. Traditional viewability metrics, which focus solely on whether an ad is visible on screen, fail to account for actual viewer engagement. Eye-tracking data reveals that many ads deemed viewable are not actively viewed by consumers, thus inflating the perceived effectiveness of such ads.

In addition, there are times when viewability rates can underestimate whether or not an ad is viewed. This is especially the case for mobile video ads that take up a large amount of screen real estate, where users can scroll quickly and so not reach the 2" threshold required to be counted as technically "viewable," but they may still be seen.
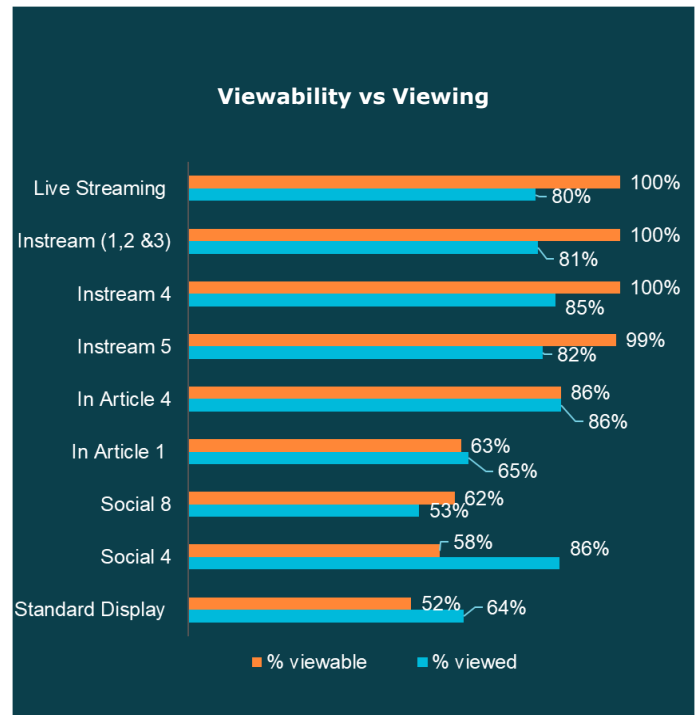
Reliance on viewability as a primary metric can mislead us on an ad's likely impact.

From this research, we will mainly use attention as the currency to evaluate media quality, and we believe this could be the next-generation metric for measuring campaign success.

## Attention outperforms Viewability In predicting brand recall

This chart (Fig. 2) is a comparative analysis of the explanatory power of viewability and attention metrics in predicting brand recall. The key finding is that attention, as measured by average viewed time, significantly outperforms viewability in predicting recall. Average view time has an R² score of 0.1845, meaning it predicts 18% of the variation in recall. Other factors, such as brand fame and creative quality, will also drive recall, but basic attention is a key driver. In contrast, Viewability was not correlated with recall in our data.

**Viewability vs Viewing**

| Placement | % viewable | % viewed |
|---|---|---|
| Live Streaming | 100% | 80% |
| Instream (1,2 &3) | 100% | 81% |
| Instream 4 | 100% | 85% |
| Instream 5 | 99% | 82% |
| In Article 4 | 86% | 86% |
| In Article 1 | 63% | 65% |
| Social 8 | 62% | 53% |
| Social 4 | 58% | 86% |
| Standard Display | 52% | 64% |

The R² score of 0.1845 for attention demonstrates a stronger correlation between average viewed time and prompted brand recall. This suggests that the longer an ad holds a viewer's attention, the more likely the viewer is to recall the brand. The data points in the scatter plot show a clear positive trend, with higher brand recall percentages associated with longer average viewed times.

These findings underscore the need for advertisers to focus on attention metrics rather than relying solely on viewability metrics. Ads that are designed to capture and maintain viewer attention are more likely to be effective in enhancing brand recall. This shift in focus can lead to more efficient and impactful advertising strategies.

By prioritizing attention metrics, advertisers can better allocate their budgets to ad formats and placements that truly engage viewers, thereby optimizing the return on investment (ROI) of their advertising spend.

Fig. 2
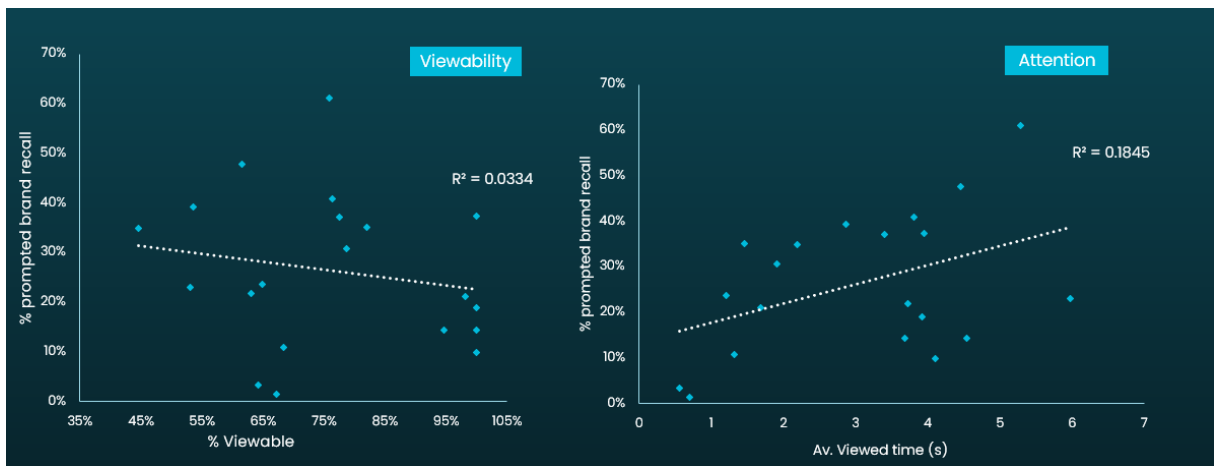


*Each data point represents a test ad: sample size (20), excluding outliers and live streaming*

# THE DISTRIBUTION OF ATTENTION ACROSS DIGITAL

The analysis of the distribution of attention across various advertising channels (Fig. 3) reveals significant insights into viewer engagement and retention. Different channels demonstrate contrasting distributions of average view time, with Instream and Live Streaming ads showing higher retention rates.

One consideration is that Instream and Live Streaming often benefit from some formats utilizing non-skippable/forced attention. This is evident in the higher attention distribution maintained by these formats over time, as opposed to social and standard display ads, where viewers can easily navigate away from the ad's fixed position.

A common trend observed across all channels is that most impressions only get very short amounts of attention, with most only getting viewed for a second or two.

This is especially the case with some social formats like Social 8 and standard display ads, where very few ads are seen for more than a few seconds. But even the strongest channels, such as Instream 4 and 5, have many ads only seen for less than a few seconds, with only around 50% getting more than 3" of attention.

While it's true that attention tends to be short, audiences also view ads for longer periods, with many viewing for more than 10", indicating a level of strong engagement with the advertising. Some channels and formats are much better than others at delivering long views. Instream formats receive the highest viewing times, but In-Article formats are also able to deliver these longer viewing times as well.
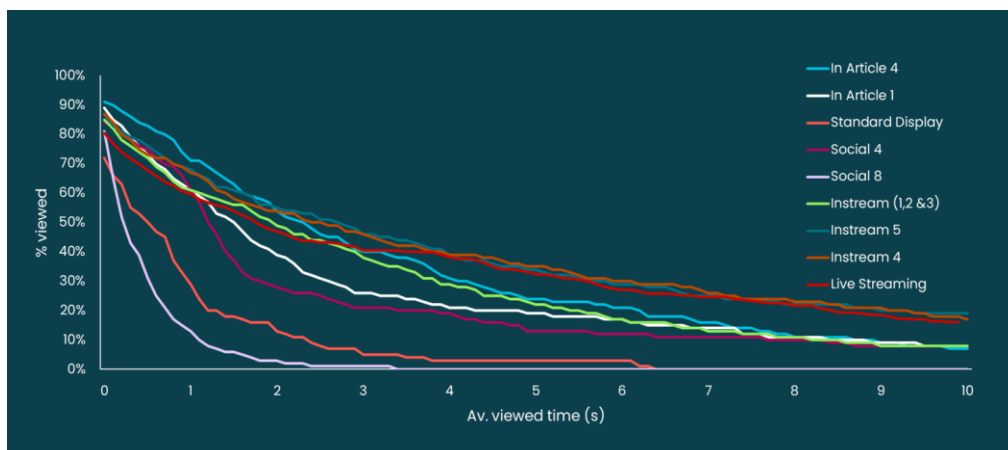


Fig. 3

# INSTREAM and LIVE STREAMING DRIVE HIGHEST LEVELS OF ATTENTION

These findings underscore the importance of a strong media mix in maximizing attention on mobile platforms. Rather than framing this as a competition between channels, the data suggests that a diverse media mix is key to sustaining viewer attention.

Forced attention formats like some of the Instream and Live Streaming can be complemented by other formats to achieve a comprehensive and effective advertising strategy. By leveraging the strengths of various channels, advertisers can enhance the overall effectiveness of their campaigns, ensuring that ads capture and retain viewer attention more consistently across different platforms.

The data (Fig. 4) emphasizes that the average viewed time is the most critical factor for generating attention.
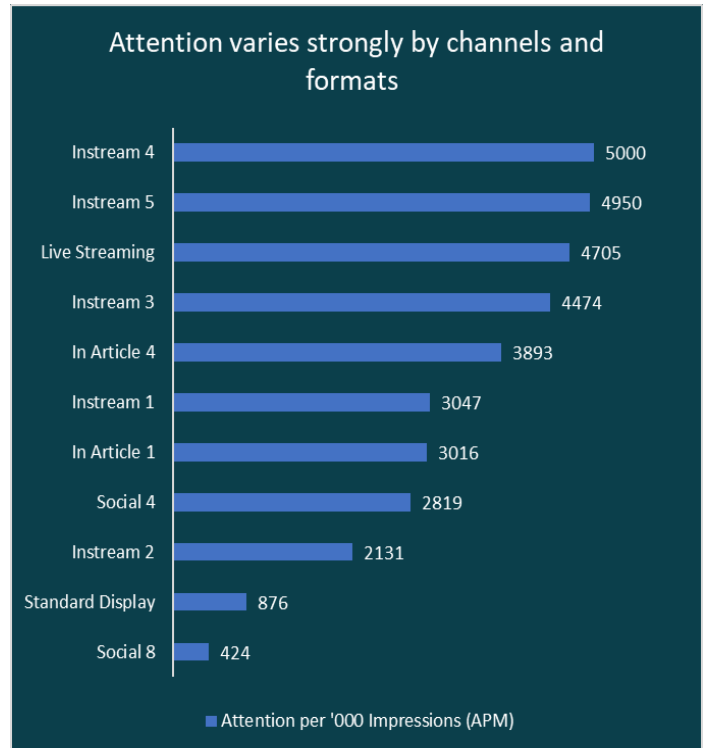
Among the channels tested in Japan, Instream 4 and Instream 5 led the way. By generating the longest average viewed times, they achieved the highest APM scores, 60% and 58% above the average, and outperformed other formats by as much as 11 times.

This superior performance can be attributed to several key factors, notably the ad length and functionality.

An important note to consider is that Instream ads have an advantage compared to other placements as they benefit from a higher degree of forced exposure formats. These ads are often non-skippable or skippable after a certain number of seconds have passed and, thus, more likely to be viewed in their entirety.

This enforced viewing mechanism ensures that viewers are likelier to engage with the content, resulting in higher average view times.

Fig. 4



Attention varies strongly by channels and formats

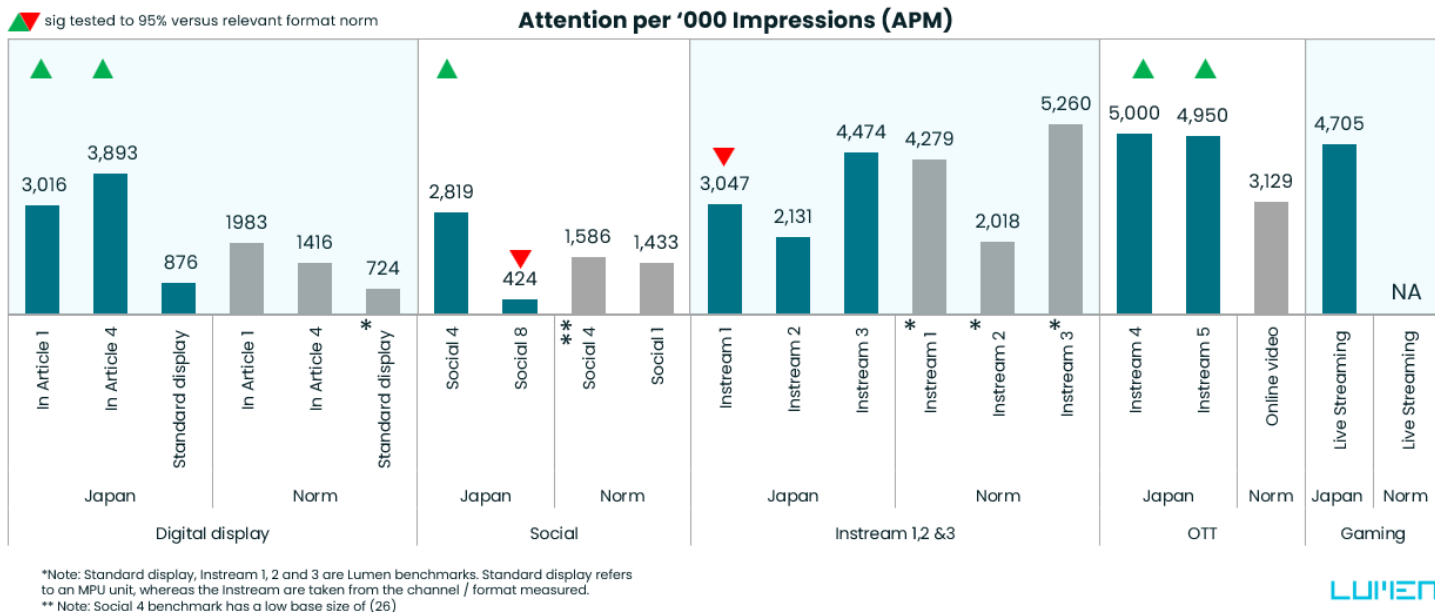| Channel/Format | Attention per '000 Impressions (APM) |
|---|---|
| Instream 4 | 5000 |
| Instream 5 | 4950 |
| Live Streaming | 4705 |
| Instream 3 | 4474 |
| In Article 4 | 3893 |
| Instream 1 | 3047 |
| In Article 1 | 3016 |
| Social 4 | 2819 |
| Instream 2 | 2131 |
| Standard Display | 876 |
| Social 8 | 424 |

However, it is crucial to consider the potential downside of relying exclusively on forced exposure ads.

While Instream ads perform better in attention metrics, an overreliance on these formats could lead to consumer fatigue and a negative brand perception.

If used excessively, forced exposure ads may irritate viewers and diminish their overall experience, potentially creating adverse feelings toward the brand.

# ATTENTION IN JAPAN COMPARED TO GLOBAL BENCHMARKS

Fig. 5



**Attention per '000 Impressions (APM)**

▼ sig tested to 95% versus relevant format norm

*Note: Standard display, Instream 1, 2 and 3 are Lumen benchmarks. Standard display refers to an MPU unit, whereas the Instream are taken from the channel / format measured.
** Note: Social 4 benchmark has a low base size of (26)

LUMEN

In general, attention paid to advertising in Japan is similar to global benchmarks (Fig. 5), although there were statistically significant differences for some formats.

Instream 4 and Instream 5 outperformed the global norms significantly, demonstrating their superior capability to capture and maintain viewer attention, even among a Japanese audience. Specifically, Instream 5 achieved an (APM) score of 4,950, while Instream 4 attained an even higher score of 5,000, both of which exceeded the benchmark of 3,129 by a substantial margin. Likewise, we see stronger performance among In Article 1 and In Article 4, surpassing their respective benchmarks. This impressive performance underscores the effectiveness of these formats in generating high levels of initial attention.

*"By leveraging the strengths of various channels, advertisers can enhance the overall effectiveness of their campaigns, ensuring that ads capture and retain viewer attention more consistently across different platforms."*

# ATTENTION LEADS TO AD RECALL AND BRAND RECOGNITION

The chart (Fig. 6) illustrates a robust relationship between the duration of ad viewing and the likelihood of brand recall, underscoring the pivotal role of attention in driving advertising effectiveness. The data demonstrates a clear positive correlation, with longer viewing times resulting in higher prompted brand recall rates.

Specifically, the percentage of individuals who recall the advertised brand increases progressively with the average viewed time. For example, recall lifted by 21% for those who only viewed the ad for less than 1 second, but this rose to 41% for those who viewed the ad for more than 10 seconds.

Especially important and effective duration would be 1 - 3 and 3 - 6 seconds. If we were able to improve the viewed time from 0.1 - 1 to 1 - 3, we would enjoy the brand recall improved from 21% to 24%, incremental 14 pts, much greater effectiveness is observed from 1 - 3 improved to 3 - 6s with an incremental 29 pts improvement in brand recall. Advertisers should first focus on capturing the audience's attention for at least the first 6 seconds and then gradually improve to 10 seconds or even more.

The incremental increase in recall with longer viewing times highlights the importance of engaging ad content that captures and holds the viewer's attention.

The findings emphasize advertisers' need to focus on strategies that maximize viewer engagement duration. By creating compelling and visually appealing ads, advertisers can enhance the likelihood of brand recall, thereby improving the overall effectiveness of their campaigns.

Fig. 6
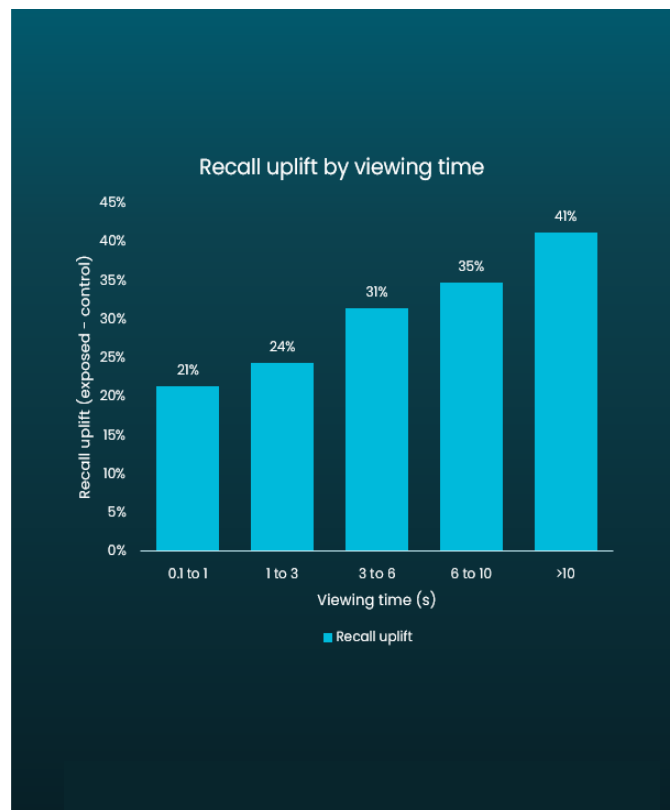


Note: These predictions don't take into account creative or targeting. The basic model assumes that attention-grabbing creatives serve averagely well-targeted consumers, though it is possible to add these factors to client-specific models.

In conclusion, the relationship between attention and brand recall presented in this slide provides compelling evidence for the critical role of sustained viewer attention in advertising success. Advertisers are encouraged to prioritize engaging content and employ attention-based metrics to assess better and enhance the impact of their advertising efforts.

# ATTENTION LEADS TO AD RECALL AND BRAND RECOGNITION (CONT.)

The research found that not all attention is equal, with a crucial distinction between forced and voluntary attention (Fig. 7).

By voluntary attention, we mean advertising formats in which people are in control of whether or not they continue to look at the ad. This means that if they are looking at the ad, they have chosen to do so and are engaged.

In contrast, by forced attention, we mean advertising formats in which people cannot remove the ad from view to see their chosen content at all times, including 'skippable' formats that have periods of forced viewing. Forced viewing ad formats tend to get higher attention scores, but people's attention is less concentrated—people may be looking without really "seeing."

When attention is voluntary, it is harder to reach longer viewing times, but once people do, the impact on outcomes is significantly higher. Those who looked at the advertising for 5 to 10 seconds were 18% more likely to recall the advertising when that attention was paid voluntarily compared to when it was forced.

Fig. 7
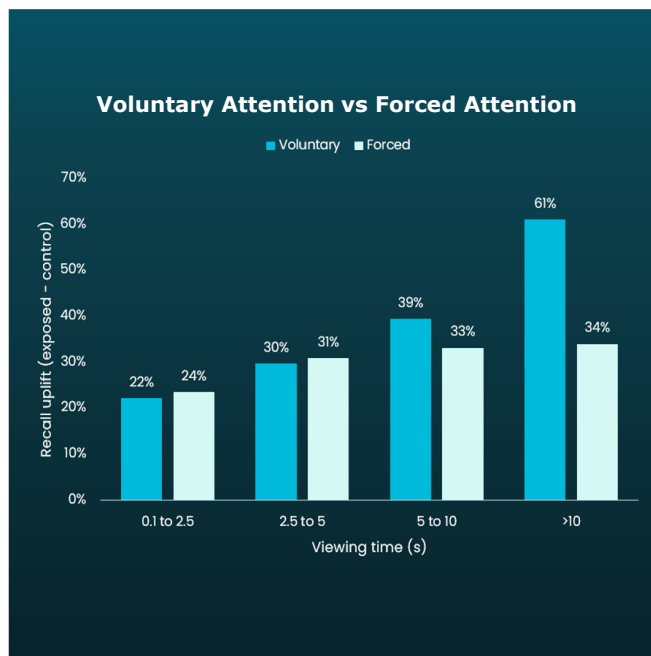
And among those who viewed for more than 10" there was an even more dramatic result, with recall 79% higher when the attention was voluntary.

# LOWER AD REACTION RATES IN JAPAN

Fig. 8

|  | Research in Japan | Eastern Asia | Global |
|---|---|---|---|
| In-Context | 1.6% | 1.0% | 3.8% |
| Forced Exposure | 3.1% | 3.0% | 8.3% |

*Figure of Average Reactions %*

Research indicated (Fig. 8) lower reaction rates (no matter positive, e.g. , happy or negative, e.g., confusion emotion) in Japan and Eastern Asia, both in in-context and forced exposure scenarios. This supports Realeyes' wider research in Japan, where data (including ground truth) shows lower expressiveness in response to advertisements. One could argue that this is reflective of cultural differences in media consumption behaviors or advertising reception, which also means how the advertiser crafts the creative and chooses the right channel is more important than in other regions.

This cultural phenomenon could be augmented by low reactions caused by consumers having become anesthetized to digital ads due to a greater degree of low-quality digital creative assets. It is important to note that Japan is one of the few markets that still uses a great degree of static display ad formats, either due to a higher volume of CPC performance campaigns or platform inventory limitations.

Forced exposure, which eliminates the ability to skip or navigate away, understandably results in higher reaction rates. However, a complete reliance on forced exposure ads has the potential to create negative sentiments towards brands.

*"Forced-viewing ad formats tend to get higher attention scores, but people's attention is less concentrated—they may be looking without really "seeing."*

Fig. 9

| | Reactions (%) In Context | | Reactions (%) Forced Exposure | |
|---|---|---|---|---|
| | **Research in Japan** | **Global** | **Research in Japan** | **Global** |
| Display | 1.3% | 1.6% | 3.2% | 8.3% |
| Rich Media Display | 1.4% | 1.4% | 3.1% | 8.3% |
| Rich Media Video | 1.1% | 1.1% | 3.6% | 8.3% |
| Instream Video | 2.1% | 4.5% | 2.9% | 8.3% |
| Social | 2.0% | 7.3% | 3.0% | 8.3% |

# INSTREAM VIDEO AND SOCIAL DELIVER HIGHEST REACTIONS IN CONTEXT; DISPLAY AND RICH MEDIA EXCEL IN FORCED ENVIRONMENTS

(Fig. 9) Social platforms and Instream video show comparable performance in generating in-context reactions, outperforming categories like display and rich media video. This indicates that dynamic and interactive platforms are more effective in engaging viewers even when they have the option to navigate away.

However, both display and video rich media formats show consistent reaction rates between Japan and the global average. This suggests that rich media ads may be reliable for advertisers aiming for consistent engagement across the Japanese digital ecosystem.

*"Forced attention can impact ad recall due to negative attention."*

(Fig. 10) Rich media formats, both display and video, consistently achieve strong brand recall rates in Japan and outperformed the norm in Japan, comparable to traditional display ads and surpassing instream video ads. This highlights their potential for engaging viewers more effectively through interactive content. This also might suggest that movement within an ad creative can positively impact ad recall.

Fig. 10

| | Research in Japan | Global |
|---|---|---|
| Display | 56.1% | 62.5% |
| Rich Media Display | 67.2% | 59.0% (Japan norm) |
| Rich Media Video | 65.6% | 59.0% (Japan norm) |
| Instream Video | 42.5% | 49.9% |
| Social | 62.8% | 73.5% |

*Figure of Brand Recognition/ Recall (%)*

When we consider the forced exposure experience from the same ad formats, the reaction percentage uplifted from all ad formats, which is expected. However, the increment percentage from Instream Video and Social is significantly lower than other formats, including Display, Rich Media Display, and Rich Media Video. This result could imply in order to drive reaction and emotional engagement, advertisers should consider more forced exposure formats, but the right balance between forced and unforced exposure is also necessary to drive success.

Instream video had slightly less Brand Recognition compared to Global normative levels, which can be expected despite reduced distractions in the environment because of a concept that can be called "negative attention" - respondents watching the screen not for enjoyment but because they're waiting for their desired content and/or the "skip" button.

# ATTENTION ALSO DRIVES BRAND CHOICE

The study (Fig. 11) proved a relationship between ad attention and brand choice, demonstrating that higher levels of attention correlate with increases in brand uplift among the tested ads in Japan.

While the correlation between attention and brand choice is less pronounced than between attention and brand recall, it remains significant. This is likely due to the influence of various "meaning" factors, such as creative content, targeting, and context, which also impact brand choice decisions.

The results reveal a clear positive trend: as average viewed time increases, so does the percentage of brand choice. This suggests that sustained attention to ads significantly enhances the likelihood of consumers choosing the advertised brand.

They highlight the critical need to design ads that not only capture but also sustain viewer attention to drive brand choice effectively. The data suggests that incremental gains in brand choice are achievable with increased attention.

In conclusion, the analysis underscores the pivotal role of attention in influencing brand choice. Advertisers should focus on creating compelling ad content that holds viewer attention to maximize brand uplift. By leveraging attention-based metrics, marketers can gain a more accurate understanding of ad effectiveness, enabling them to craft strategies that drive consumer decision-making and enhance overall campaign performance.

Fig. 11
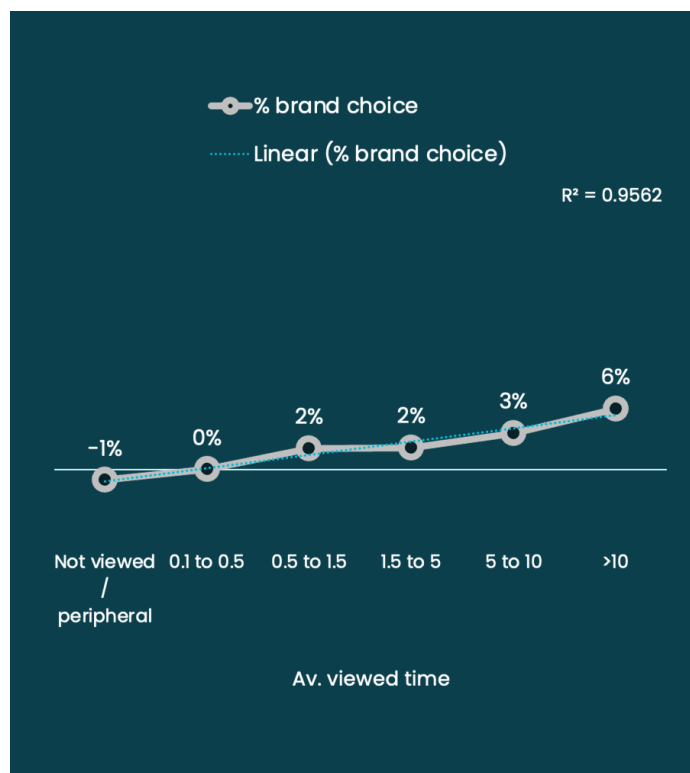
# BRANDS MUST HAVE CREATIVE STRATEGY PER FORMAT TO ACHIEVE UPLIFT

(Fig. 12) The variability across all ad formats suggests that continuous testing and optimization are crucial. Given the significant impact of creative quality on brand choice, advertisers should prioritize the development of high-impact, engaging ad content, particularly for video and in article formats. Investing in creative excellence can maximize positive brand choice uplift.

Online Video/Instream

- Performance Variability: The Online Video/Instream category exhibits a wide range of brand choice uplift, from a high of 10% to a low of -5%. However, most ads in this category demonstrate positive uplift, with significant peaks at 10% and 8%.
- Creative Impact: The substantial variance suggests that the effectiveness of video ads heavily depends on the creative execution. Ads that effectively leverage video content's dynamic and engaging nature can achieve substantial brand choice uplift, but poor execution or forced attention can lead to negative outcomes.

In Article/Standard Display

- High Potential: In Article/Standard Display ads show strong potential for driving brand choice, with uplifts peaking at 29%. Several ads in this category consistently achieve uplifts between 8% and 2%.
- Consistency: This category generally maintains positive uplift rates, indicating that well-placed and contextually relevant in-article and standard display ads can significantly influence brand choice. The data suggests that these formats benefit from the integration within the content, which can enhance viewer engagement and recall.

Social Media

- Mixed Results: Social media ads show the most variability and tend to perform poorly in terms of brand choice uplift, with values ranging from 17% to -4%.
- Challenges: The lower performance and higher frequency of negative uplift in social media ads suggest that these platforms are more challenging for advertisers. The fast-paced, user-driven environment of social media may make it difficult for ads to capture and maintain viewer attention, leading to less effective brand messaging and a difficulty in consumers recalling ads they've seen.

Fig. 12



Note: Data shows performance from all assets from each tested channel bar Gaming.
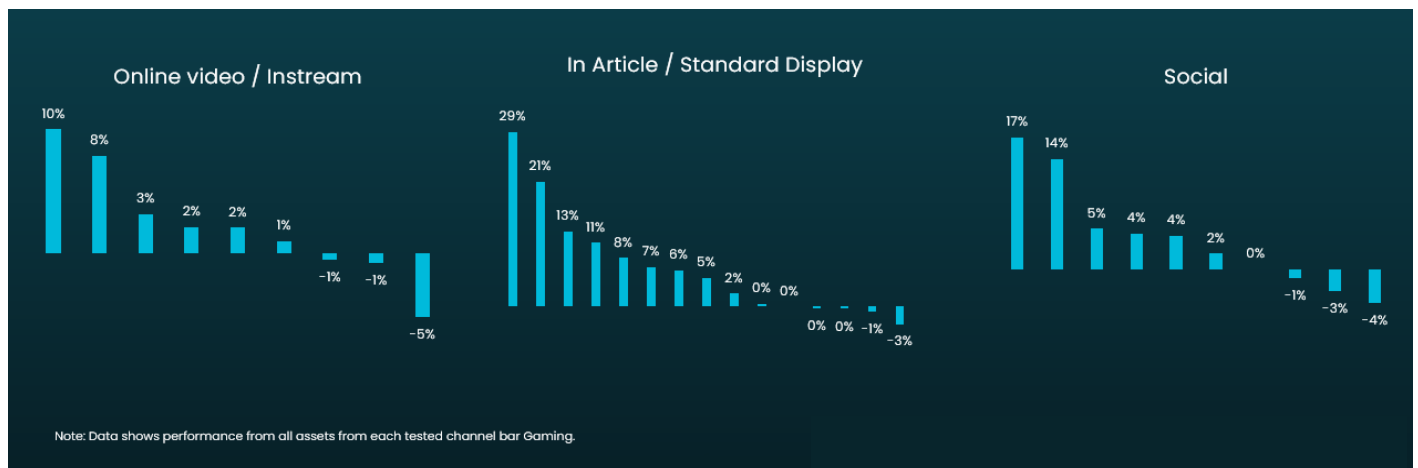
# KEY FACTORS THAT IMPACT ATTENTION

**Viewable Time** - While viewability alone does not directly translate to attention, there is a positive correlation between viewable time and attention. Ads that maintain high viewability are more likely to achieve higher Attention Per Mile (APM) scores. This implies that ensuring an ad remains viewable for extended periods can enhance its potential to capture and sustain viewer attention.

**Forced Viewing** - Ad formats that disable the skip function tend to generate higher levels of attention compared to those that allow voluntary viewing. This enforced exposure compels viewers to engage with the ad content for its full duration, thereby increasing the likelihood of attention and subsequent engagement.

**Duration** - Longer-duration ads exhibit greater potential to be viewed and held the viewer's attention for extended periods. This is particularly true as consumers may engage with other content and then return to the ad multiple times. The ability of longer ads to maintain viewer interest over time underscores the importance of considering ad length in the design of effective advertising strategies.

**Movement** - Ads incorporating motion elements achieve better attention than static ads. Formats that include dynamic components such as spinning, vertical/horizontal movement, or animation tend to generate longer average view times. This increased engagement with motion-based ads highlights the effectiveness of incorporating movement to capture and hold viewer attention compared to static images or videos.

**Size** - Ad formats with larger display areas result in higher average view times compared to smaller-sized ads. The increased size captures more of the viewer's visual field, which leads to greater attention levels overall. This finding suggests that maximizing the display area of ads can significantly enhance their effectiveness.
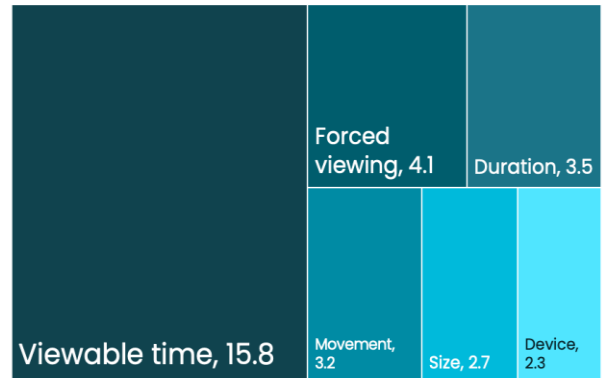


In article formats (Fig. 13) which follow navigation show strong potential to be viewed and for longer

A stronger APM was generated by formats which do not remain in one place and follow viewers as they navigate around a webpage, thereby giving a longer duration to be potentially viewed.

This format creates a greater potential to be seen by viewers multiple times and thereby giving a greater cumulative view time. The longer an ad is in view, the greater level of attention it will receive:
*   It will be noticed by more people
*   It will be looked at for longer
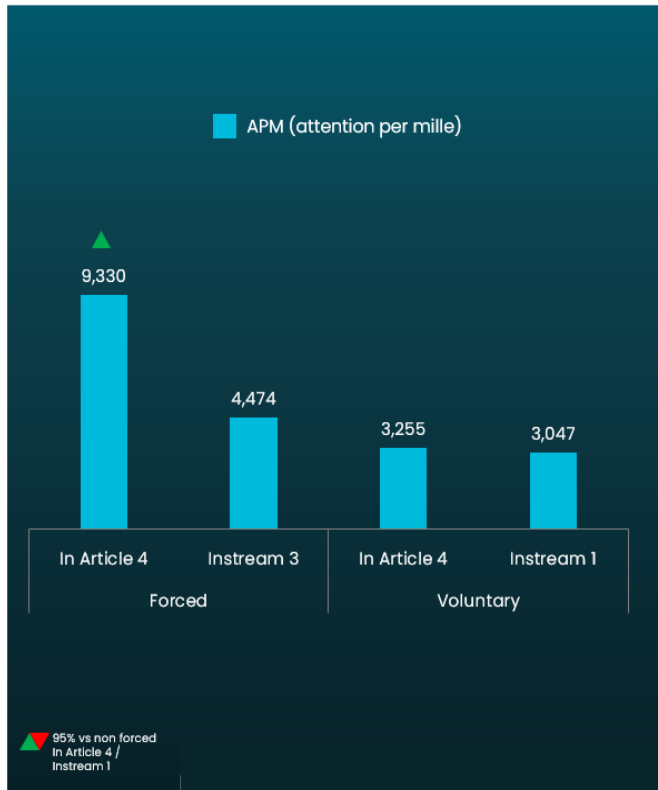*   It will generate more attentive seconds per 1000 impressions.

Fig. 13
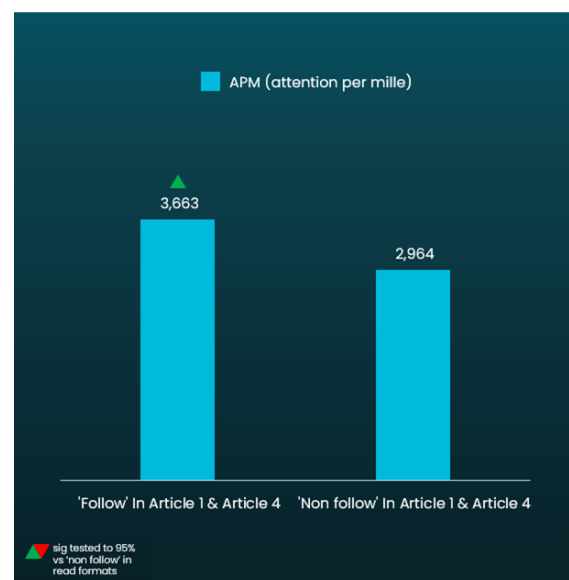


*Base: Non follow In Article 1 and 4 formats (367), Non follow In Article 1 and 4 formats (170), Note, both video and static formats that are not forced have been include within each group.*

# KEY FACTORS THAT IMPACT ATTENTION (CONT.)

Fig. 14



*Base: Forced In Article 4 (27), Voluntary (Non forced) In Article 4 (271), Non skippable Instream 3 (231), Voluntary (Skippable) Instream 1 (116)*

Forced attention drives higher APM compared to voluntary attention (Fig. 14).

The In Article 4 format, which used 'forced viewing' by covering the entire mobile screen, generated a higher level of attention than other In Article 4 ads, which followed a voluntary viewing approach.

While only directional, the same can be seen in the Instream video in which the skip is disabled, generating a higher level of attention despite a longer duration overall.

However, brands must be cautious. As we have seen, voluntary viewing is more impactful than forced viewing, and forced viewing can have a negative reaction.

Larger size In Article 1 ads showed better potential to generate higher levels of attention (Fig. 15).

Larger area ad formats generated higher average view times than those of a smaller size, which in turn generated higher overall attention.

- Small: less than 155000 pixels2

- Large: 155000 pixels2 or more

Ad size is a statistically significant driver of attention on both mobile and desktop. By modelling ad area (000 pixels), together with attentive seconds per 1000 impressions, the study data shows that for mobile formats, this finding holds true across markets, domains, and audiences.
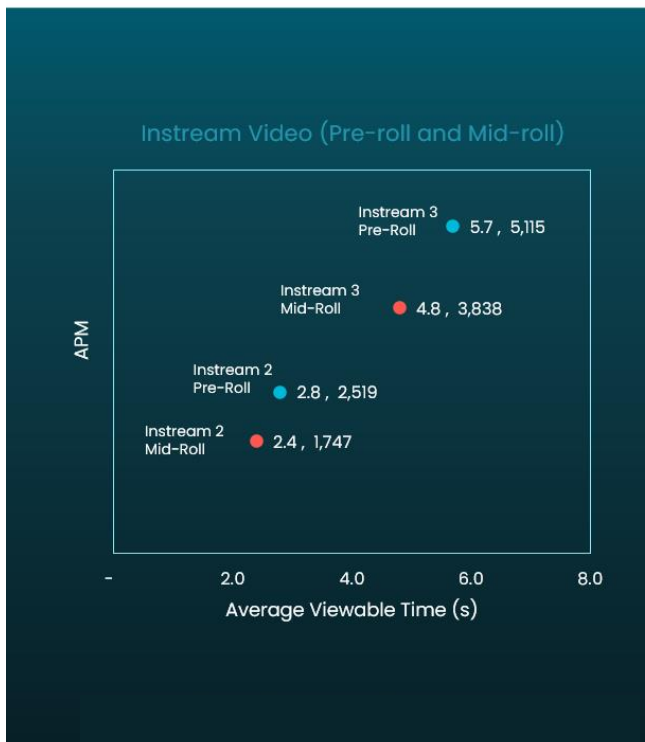
Fig. 15
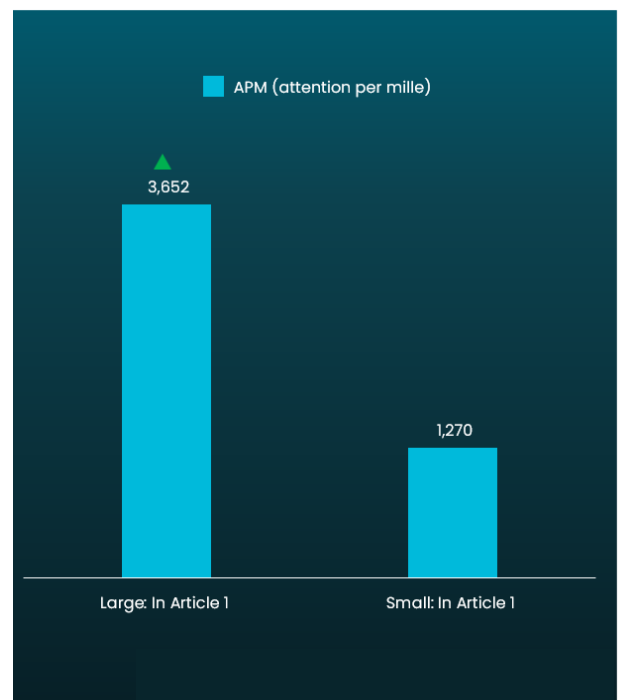


*Base: Large In Article 1 (195), Small In Article 1 (71)*
*Please note both groups are comprised of various ad durations and are based solely on size*

# KEY FACTORS THAT IMPACT ATTENTION (CONT.)

Fig. 16



**Instream Video (Pre-roll and Mid-roll)**

APM

Instream 3
Pre-Roll  ● 5.7 , 5,115

Instream 3
Mid-Roll  ● 4.8 , 3,838

Instream 2
Pre-Roll  ● 2.8 , 2,519

Instream 2
Mid-Roll  ● 2.4 , 1,747

-    2.0    4.0    6.0    8.0

Average Viewable Time (s)

*Base: Pre-roll Instream 2(115), Pre-roll Instream 3 (115), Mid-roll 6s Instream 2 (116), 15s Mid-roll Instream 3(116)*

Ads which use motion gain better attention that those that do not (Fig. 17).

Looking at two Social 4 assets of the same length, the ad that featured motion (video) generated a longer average view time than the post which was solely static.

Motion here shows a role in generating longer average view time and in turn generating a higher level of APM.

*"Formats that include dynamic components such as spinning, vertical/horizontal movement, or animation tend to generate longer average view times. "*

Ads of the same format which are a longer duration generated longer attention (Fig. 16).

When looking at forced instream 2 and 3 videos shown in the same channel and position, we see that the longer ad generated a higher level of APM.

Longer assets show greater potential to be viewed and for longer periods than shorter ads. Especially as respondents can look at other content and return to look at the ad multiple times.
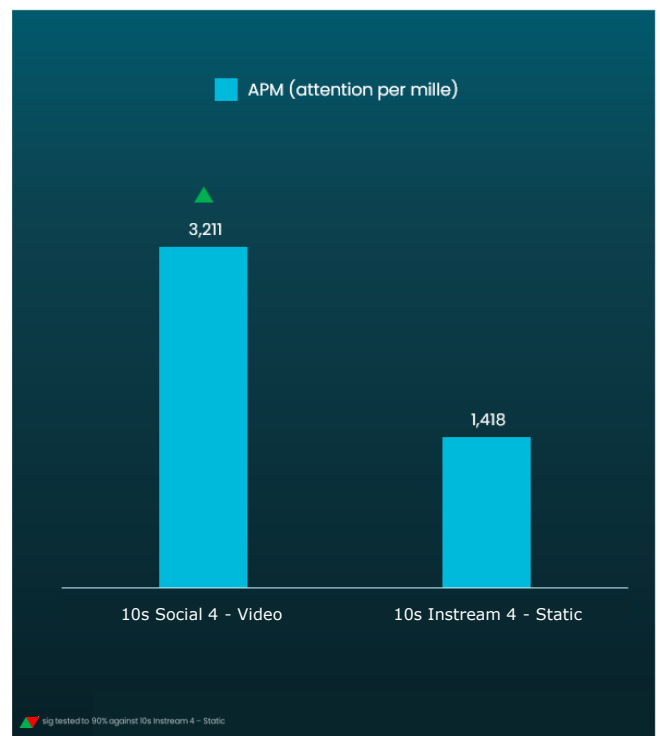
Fig. 17



■ APM (attention per mille)

▲

3,211

1,418

10s Social 4 - Video      10s Instream 4 - Static

▲▼ sig tested to 90% against 10s instream 4 – Static

*Base: 10s Social 4 - Video (204), 10s Instream 4 – Static (57)*

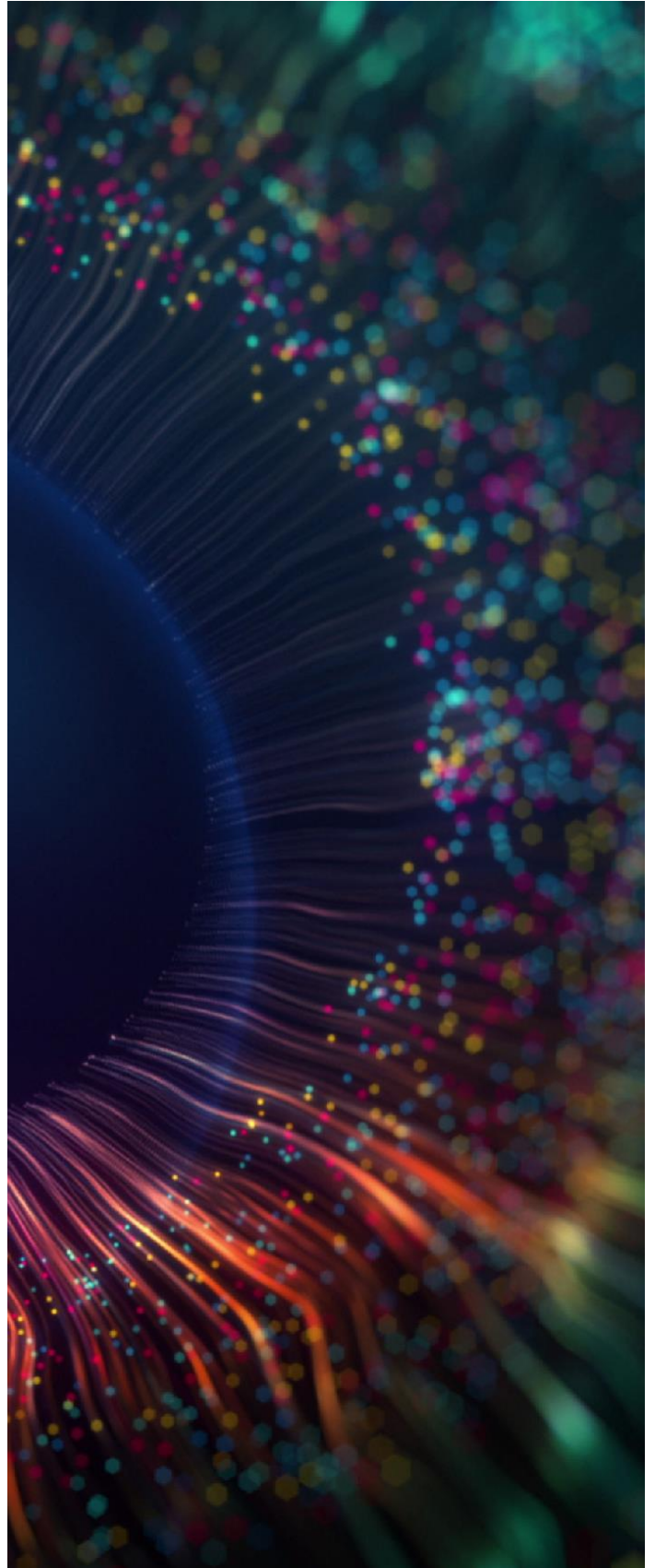## SPONSORS (BY ALPHABETICAL ORDER)

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**LUMEN**

**real eyes**

# Introducing the Attention Economy

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Phase 1 Research

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