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**CENTRE FOR AMPLIFIED INTELLIGENCE**  
Marketing Intelligence, Amplified By Technology

**Professor Karen Nelson-Field**

iag



phd

think



Mars

Cornetto



SNICKERS

The Telegraph



Dove

CBC



Radio-Canada



foxtel



AXE



MCN  
LEADERSHIP. INNOVATION.



egta.



AKTV ASSOCIATION  
OF COMMERCIAL  
TELEVISION



Reklamkraft.tv

Karen's work reported in



Key Note For



Karen's work  
integrated into





**Has the pendulum has swung too far?**  
**We were commissioned to Re-Establish the Media Baseline**



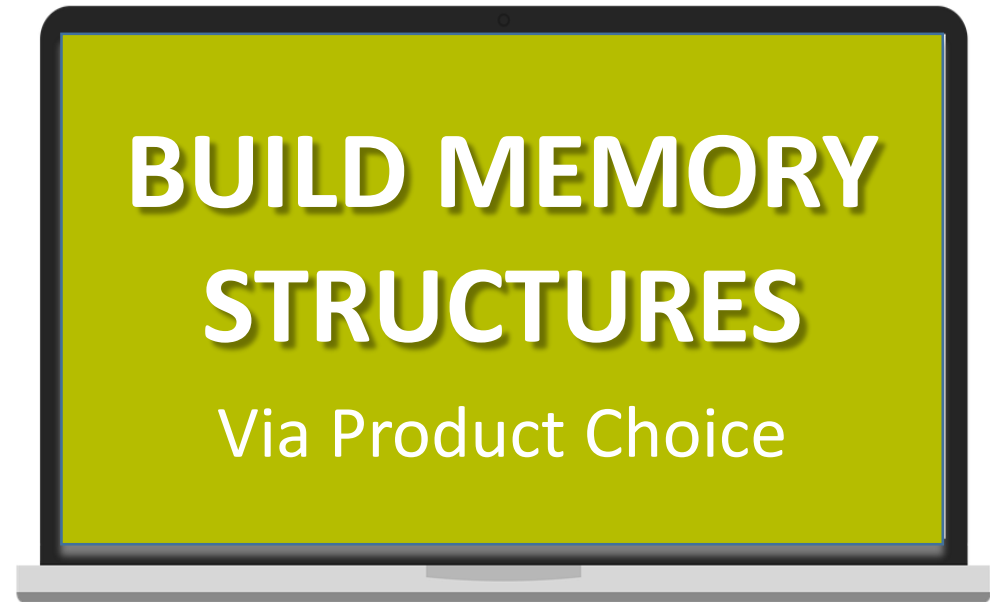


**CRITICAL** STARTING POINT FOR RIGOROUS RESEARCH:

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Re-test known media attributes **theoretically**  
**connected to brand growth.**

# Tested Cross Platform Performance Against Attributes That Matter - with 2 Key Impact Measures



# Methodological Overview



# DATA COLLECTION FLOW

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Natural Viewing – NO Lab – Same Ads - Passive – Single Source – Choice - Attention



Why

**ATTENTION**



“

Attention is the allocation  
of mental resources.  
Before consumers can be  
affected by advertising  
messages, they need to  
first be paying attention.

Thales Tiexeira  
Professor Marketing Harvard




”



Which platform commands the most  
**ATTENTION**

# In an average ad second, TV commands more ATTENTION

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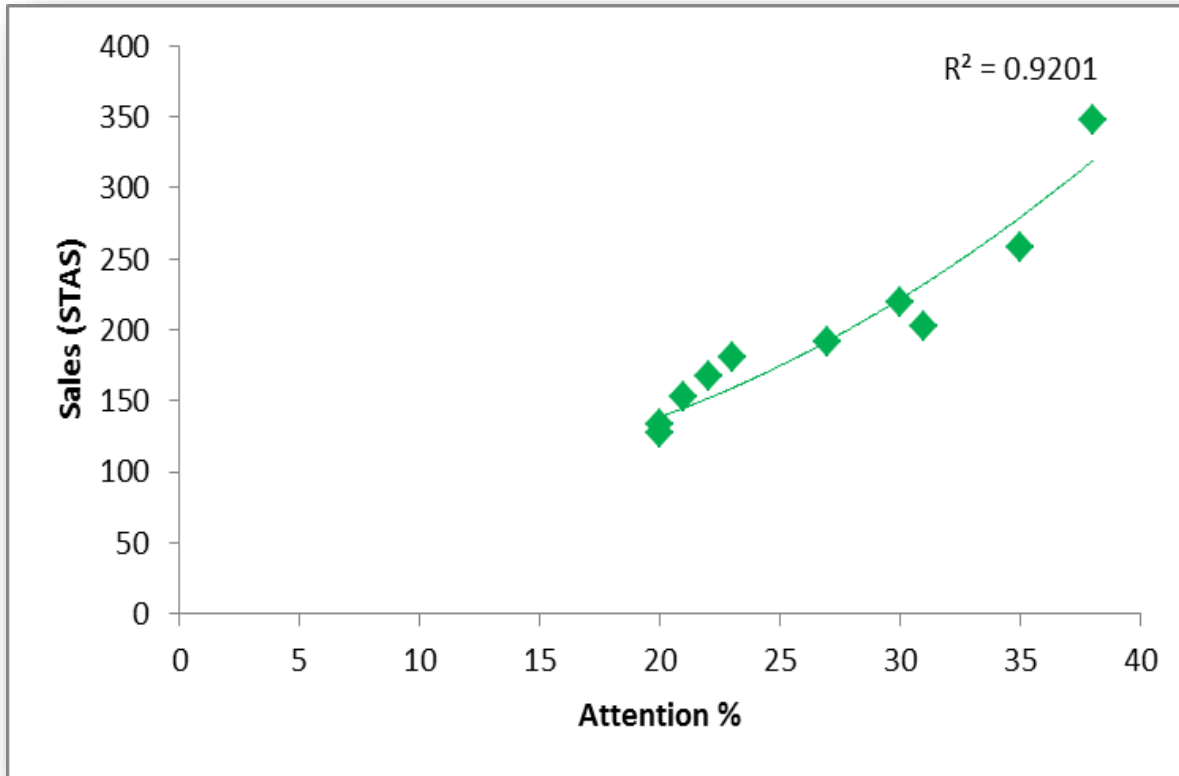
	OVERALL AVERAGE	Active Viewing	Passive Viewing	NON- Viewing
	58%	58%	40%	2%
	45%	31%	37%	32%
	20%	4%	94%	2%

- TV gets twice the active viewing as YouTube and 15x Facebook.
- Passive plays a role, but not as much as active



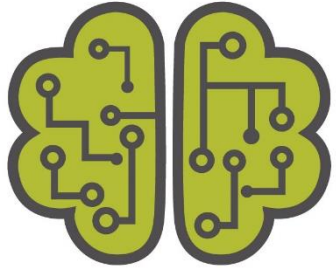
# Our two measures of impact are very closely related - **ATTENTION & PRODUCT CHOICE**

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Consistent across ALL  
sets of data (8)

Sig. sameness renders  
greater predictive value.



# OUR PATTERNS GENERALISE

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**Multiple Sets of Data** - 20

**Multiple Countries** - US, China and AUS

**Multiple Devices** - Mobile, PC, TV

**Multiple Platforms** - FB, YouTube, linear TV, AND Twitter, Todou and  
LeTV (China)




**Multiple Funders** - media owner and advertiser



What does this mean for  
**PRODUCT CHOICE**

# No surprises, TV drives more overall attention AND more SALES

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		<b>Product Choice</b> (STAS – index exposed did buy/not exposed did buy)
TV		<b>144</b>
Facebook		118*
YouTube		116

\*Passive attention does nudge sales, but less so than active

“

The platform that  
commands the greatest  
**ATTENTION** gets the  
sale.

”



**Why does attention vary so much?**

**Could screen COVERAGE**

**impact cut through?**

## Step Back a Bit - Clutter long noted as being linked to MEMORY IMPAIRMENT.

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	# Individual Campaign Exposures (10 mins)	% Correctly recalled to total exposed
TV	5	64%
Radio	3	25%
Facebook	22	4%

And this holds even to this day  
But clutter comes in many forms....



**COVERAGE** – % of screen  
that the ad covers

Via AD TAGGING  
TECHNOLOGY




All devices, all platforms



How does **COVERAGE**, an artefact of clutter, impact **ATTENTION**?

# First, COVERAGE by media type varies – a lot.

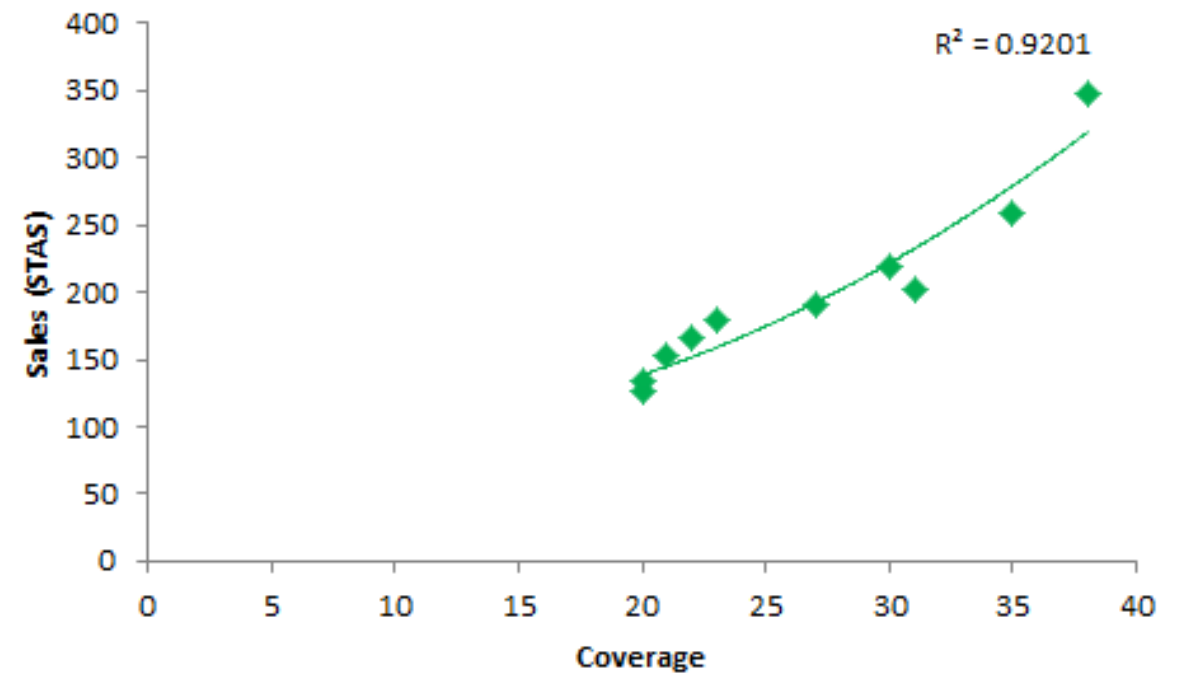
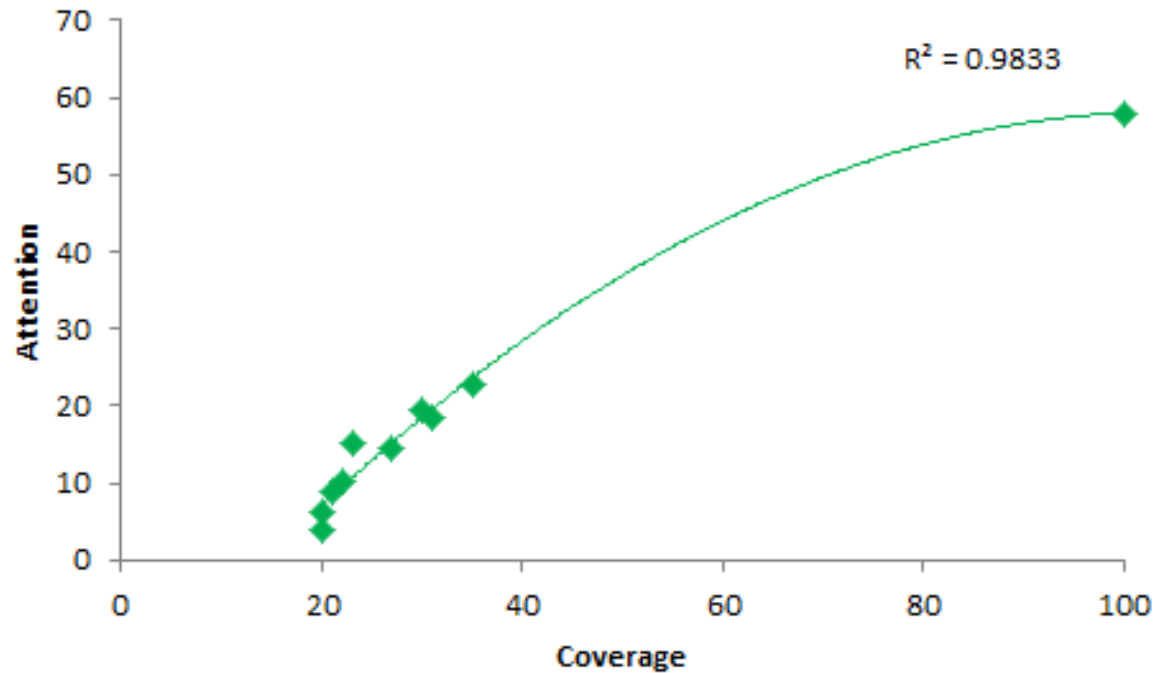
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<b>Avg. Screen Coverage</b>	<b>10%</b>	<b>30%</b>	<b>100%</b>
<b>Maximum Coverage</b> (100% Pixels, Not Scrolling)	<b>14%</b>	<b>32%</b>	<b>100%</b>

TV screen coverage is about 3x YouTube and about 10x Facebook

# COVERAGE MATTERS A LOT, to attention and sales




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VERY strong relationship - Coverage & Sales, Coverage & Attention

# COVERAGE absolutely does impact cut through

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		ACTIVE VIEWING	AVG SCREEN COVERAGE
TV		58%	100%
YOUTUBE		31%	32%
FACEBOOK		4%	14%

CLUTTER on screen increases Non-Viewing and Passive Viewing Behaviour



# Coverage is ALWAYS maxed on TV across ALL devices

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100% coverage , 100% of the time

# HANG ON

If **COVERAGE** is so vital, could the viewability standard be fostering underperformance in online?







LOTS OF CHATTER ON **VIEWABILITY**

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But what about the **Brand Owner?**  
Is 50% enough for **Attention and Sales?**

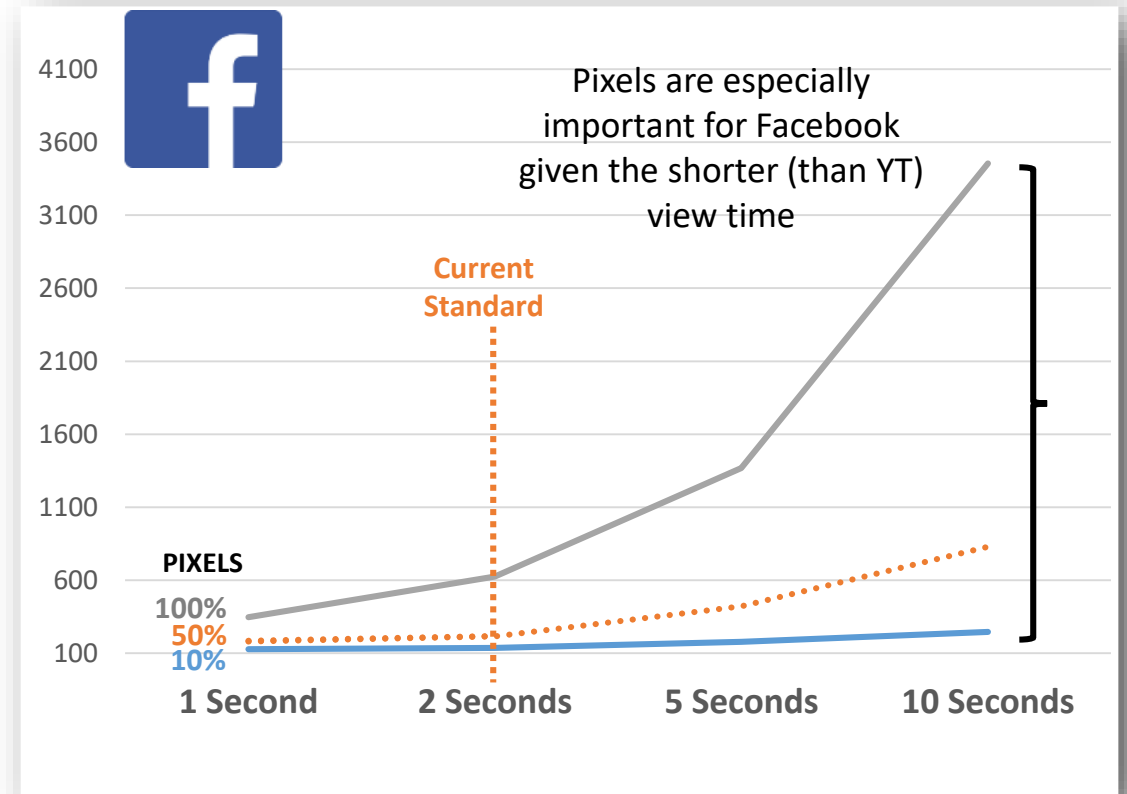
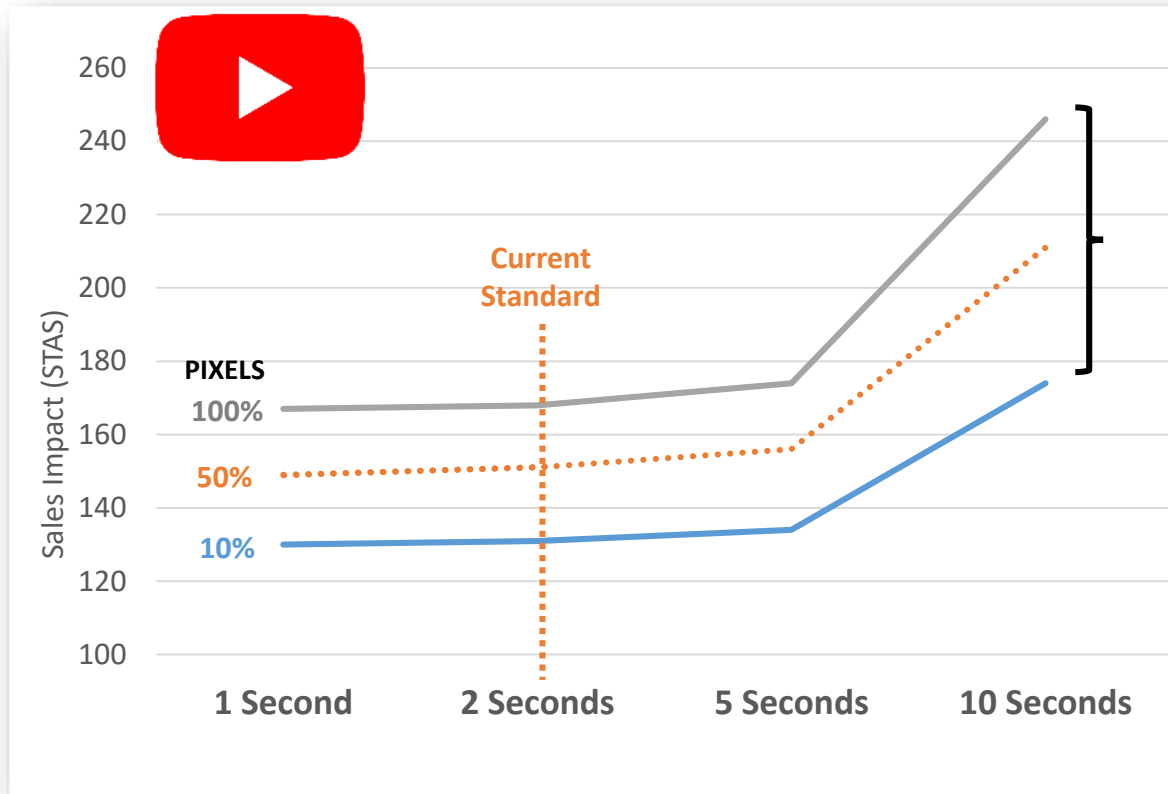




# PIXELS and TIME (and coverage)

We considered relationship  
between pixels, time,  
attention and sales.

# The minimum standard does render an impact, but..



There is material uplift in sales above 50% pixels and 2 seconds  
Pixels matter more. 100% pixels always 2x impact over 50%, regardless of time

“

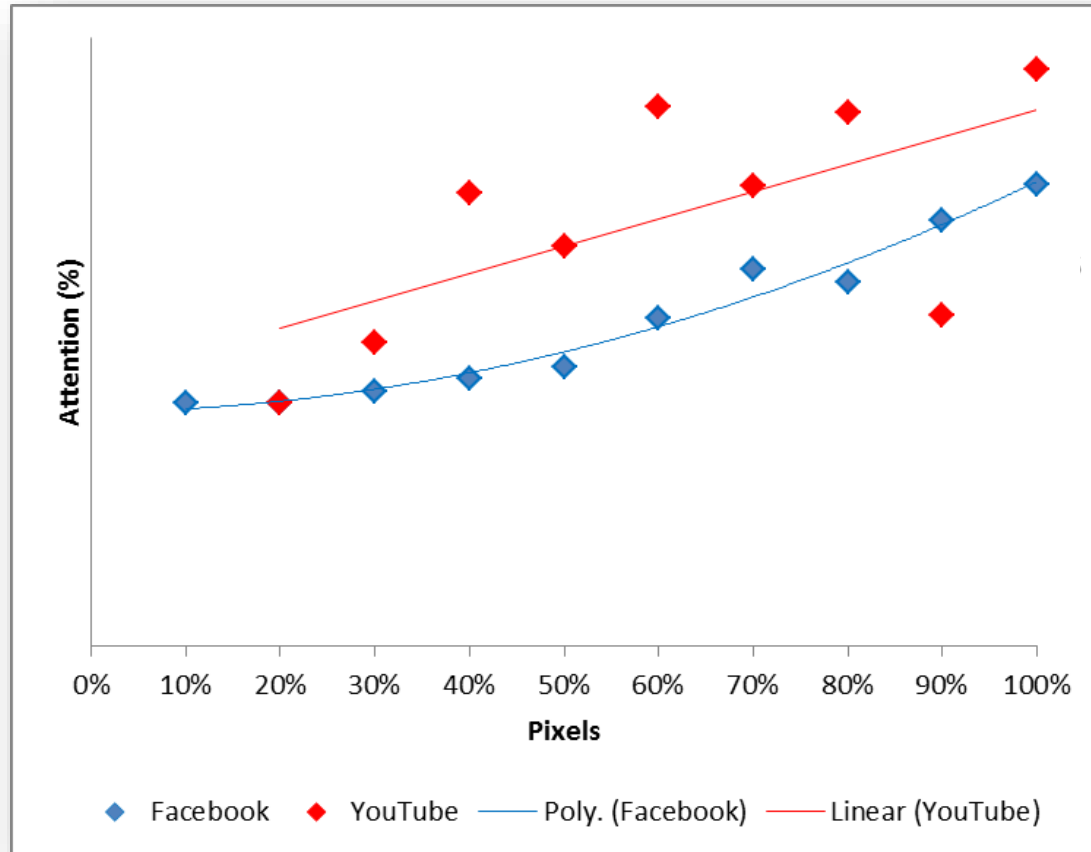
**We Know There is  
Performance Upside Beyond  
the Current Standard.**

And brand owners should fight  
for pixels over time.

”

# No surprises pixels matter, to attention also

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Attention increases with pixels (like coverage).

So anything below 100% means diminished attention (and sales).

# PLUS as pixels approach their limit of possibility, coverage becomes more vital.

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100% pixels playing full screen, has a greater impact than 100% pixels covering a smaller proportion of the screen.





“

Not all reach is equal.  
Reaching more people with lower  
visibility is a false economy.

”

## Other TV PROGRAMMING NUANCES we tested.

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**SPONSORSHIP** in quality programming improves attention and sales.

Some **DAYPARTS** perform better than others, but **ALL** broadcast content has a greater sales impact than other platforms.

**SHEER VOLUME** of advertising in pod makes a difference.....**BUT**



Programing nuances  
help but VISIBILITY is  
KING

2/3<sup>rds</sup> Impact  
on Sales

Hang on.....

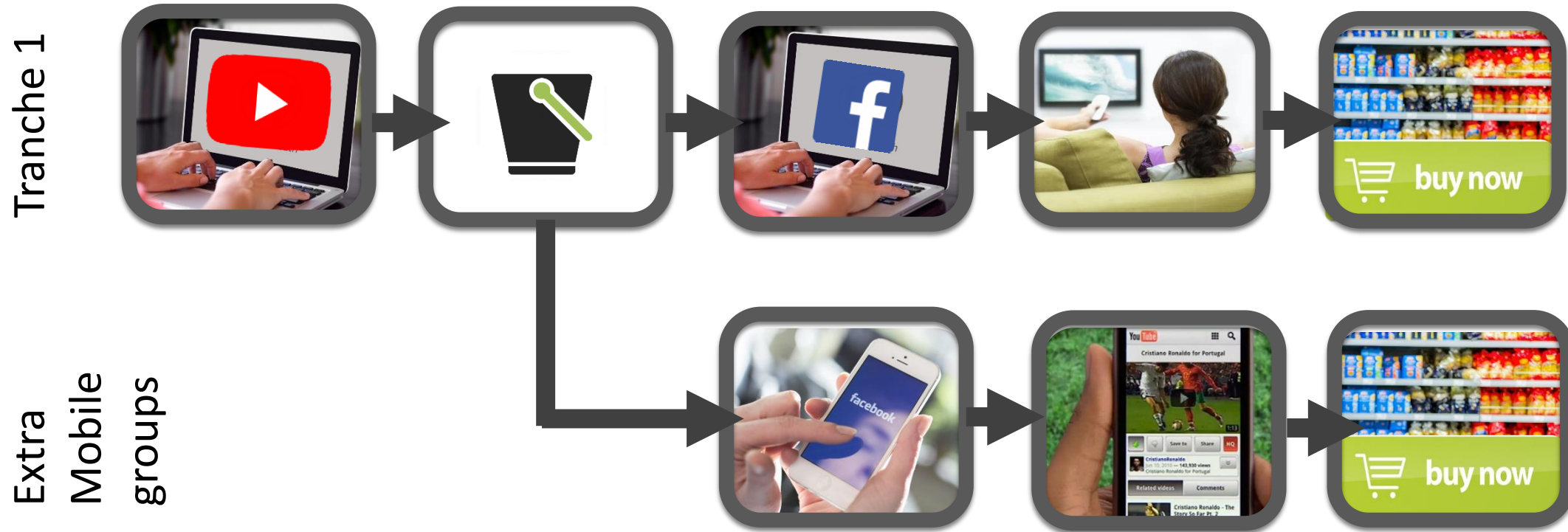
*“but mobile is the  
optimal platform for  
Facebook”*

.....we listened



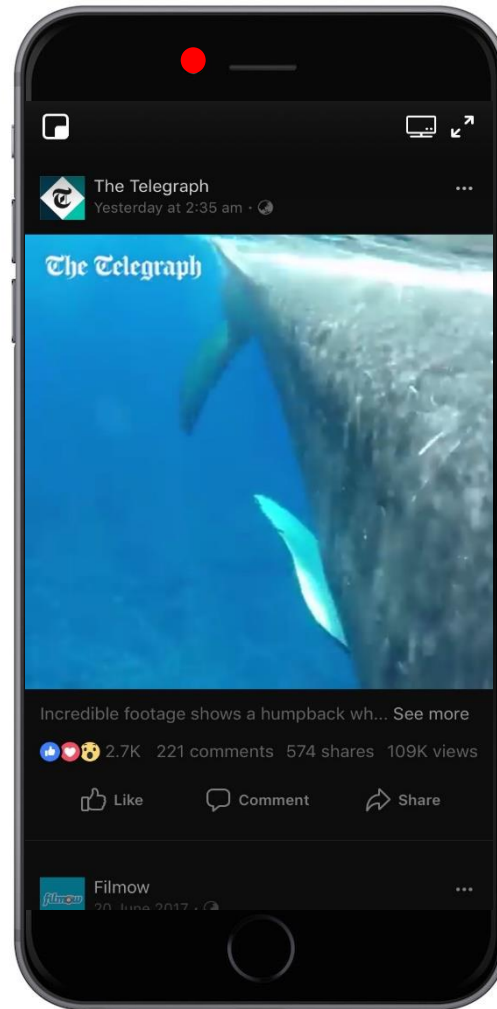
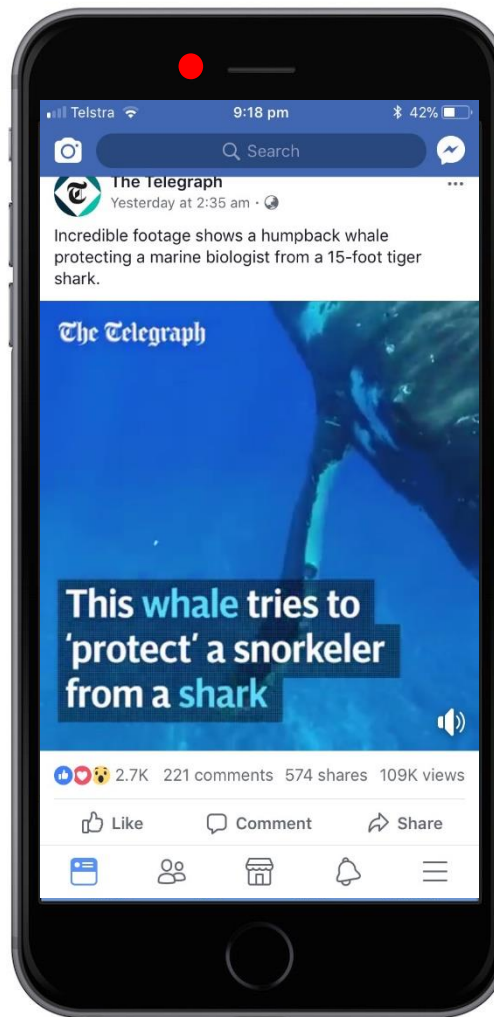


# REPLICATION AND EXTENSION



Facebook/YouTube on Mobile (*plus TV on PC and Mobile for even playing field*) Same Test Ads | YouTube Intercept

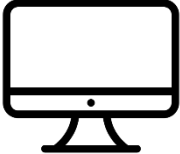
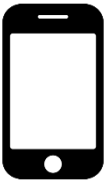




And YES, the viewability software  
**AND** the attention model was  
optimized for viewing orientation.

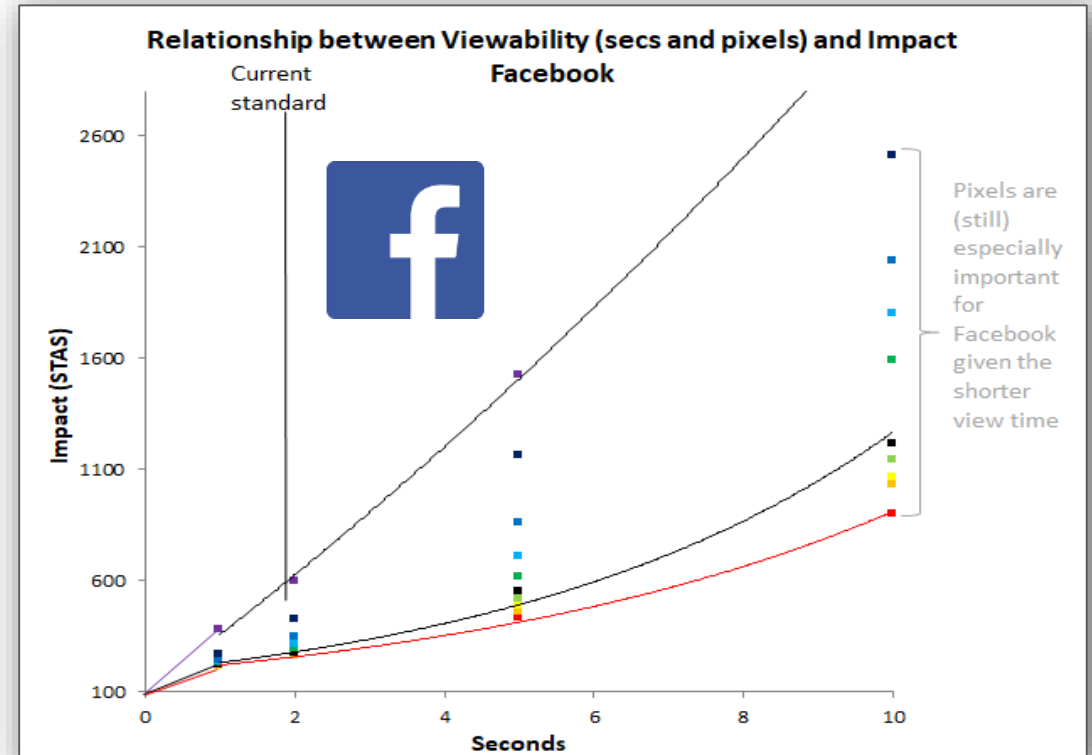
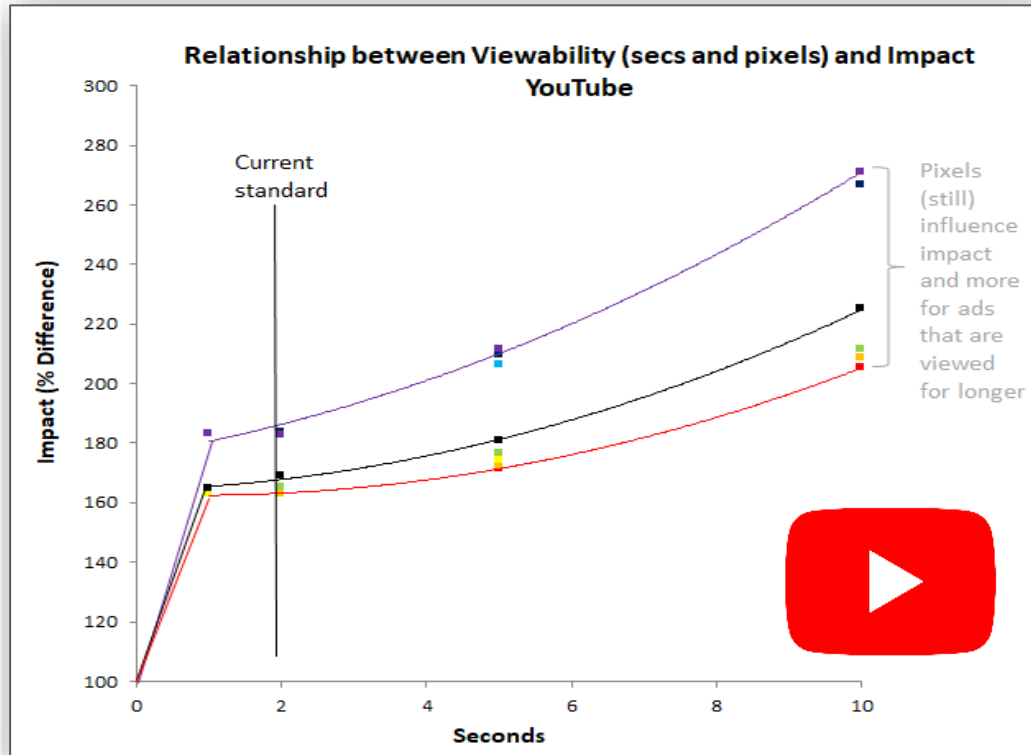


## Yes, PIXELS do improve on mobile.

		facebook	You Tube	AS SEEN ON TV
Avg. Pixels Tranche 1 PC		51%	66%	100%
Avg. Pixels Tranche 2 MOBILE		58%	82%	100%
Difference		+7	+16	0

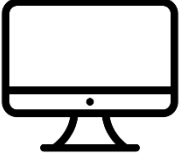

But still less than TV level (100% pixels, 100% of the time)

# VIEWABILITY patterns hold (curve same shape)

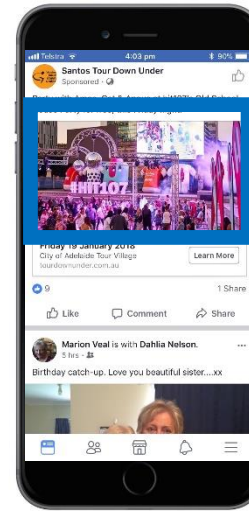


We STILL see a material uplift after 50% pixels and 2 seconds.  
Means anything less than 100%, 100% of the time diminishes return.

**Yes COVERAGE does improve on mobile, significantly for Facebook, but barely on YouTube.**

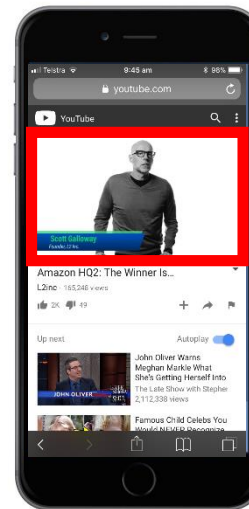
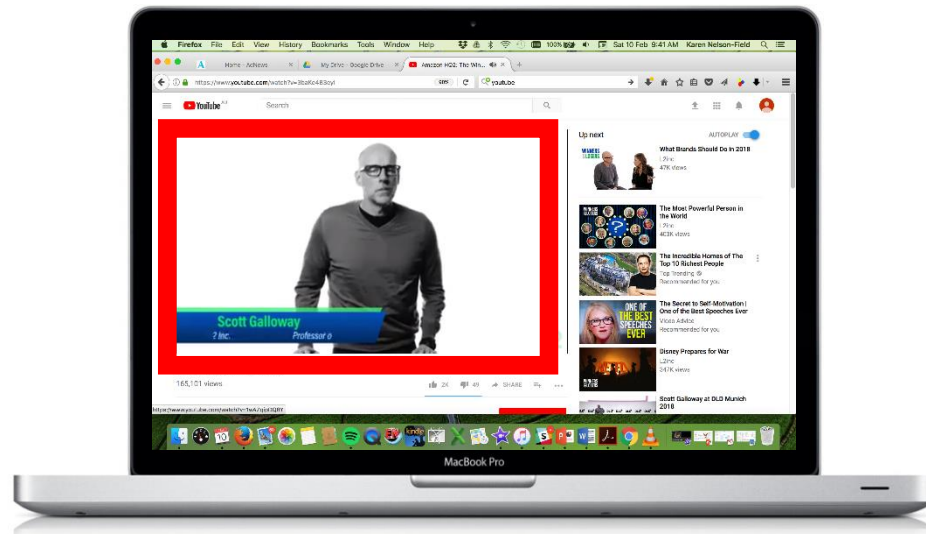
		facebook	You Tube	AS SEEN ON TV
Avg. Screen Coverage Tranche 1 PC		10%	30%	100%
Avg. Screen Coverage Tranche 2 MOBILE		27%	32%	100%
Difference		+17	+2	0

Most online ads are **NOT** viewed in full horizontal screen view (otherwise both the coverage and pixels would be greater). TV still 100%.





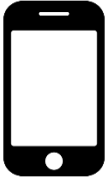



# Makes Sense.

Facebook loses about 1/3rd news feed on mobile. But YouTube coverage remains stable on mobile.



*Remember as pixels approach their limit of possibility, coverage becomes more vital to sales.*

**More ATTENTION still delivers more STAS, but total viewing experience moderates the relationship** (i.e. coverage, pixels & device proximity).

			
	58	39	63
	-	20	54
	-	45	44

Facebook gets an uplift in attention, from an increase in screen coverage.  
All of the smaller screens get more passive attention.





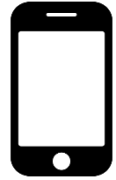



“

## **CLOSER SCREENS IMPACT ATTENTION.**

Viewers' peripheral vision adjusts to a closer device, so passive on mobile is worth more to sales than passive on other devices.

”

Yes STAS increases on mobile, but for ALL platforms.

			
	144	153	161
		118	121
		116	137

Small screens deliver more sales for all platforms, **INCLUDING** TV.  
TVs lowest STAS device still outperforms the best of online (YT mobile 137).



**VISIBILITY is  
STILL KING**

# Relationship **GENERALISATIONS**

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- ☑☐ More **ATTENTION** still delivers more **PRODUCT CHOICE**
- ☑☐ Greater **SCREEN COVERAGE** still delivers more **PRODUCT CHOICE**
- ☑☐ More viewable ads (**PIXELS & SECS**) still deliver more **PRODUCT CHOICE**
- ☑☐ **COVERAGE and PIXELS** are still dramatically higher on TV (always 100%) than online
- ☑☐ And as a result, TV still delivers more **PRODUCT CHOICE** than its competitors.

# SO, THE GOOD NEWS FOR TV CONTINUES

TV continues to outperform online  
platforms on advertising sales  
impact, on ANY device..