QUANTIFYING TV VIEWABILITY
SEVERAL YEARS AGO, DIGITAL VIEWABILITY SHOOK THE INDUSTRY

And for good reason...

31% OF ALL DIGITAL VIDEO ADS WERE NOT VIEWABLE.

Source: Extreme Reach, October 2018
MORE THAN $59 BILLION WILL BE SPENT ON TV ADS THIS YEAR...

WITHOUT KNOWING HOW VIEWABLE THE ADS ARE.

REGARDLESS OF DEVICE, VIEWABILITY INDICATES WHETHER AN AD HAS THE OPPORTUNITY TO BE SEEN.
THE VIEWABILITY CHALLENGE DIFFERS BY DEVICE

**DIGITAL**
The consumer is present, but not all served ads appear on the screen

**TV**
All ads appear on the screen, but the consumer may or may not be present
OUR RESEARCH QUESTIONS

HOW OFTEN DO TV ADS AIR WHEN NO ONE IS IN THE ROOM?

HOW DOES DIGITAL VIEWABILITY COMPARE TO TV VIEWABILITY?

WHAT FACTORS AFFECT VIEWABILITY OF TV ADVERTISING?
METHODOLOGY

WHO

Nationally representative panel

Participants opted to install TV viewability detection technology in their household

HOW

Programming and ads captured via ACR (automatic content recognition)

Viewability measured using computer vision algorithms

WHAT

6 months of data

- 5,388 individuals tracked
- 2,992,414 unique ads
- 5,961,757 impressions
- 39,464 hours of ads measured
- H2 2018, P2+, C3
- Viewability
- Attention

Source: TVision Performance Metrics
### A Deeper Look at the Metrics

#### TV Metrics

- **Viewable Ad Impression**
  - An impression aired while a viewer was in the room for 2+ seconds

- **Attention**
  - Looking at the screen for 2+ seconds during ad

#### Other Variables

<table>
<thead>
<tr>
<th>Demographics</th>
<th>• Age</th>
<th>• Gender</th>
<th>• Employment</th>
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<tr>
<td></td>
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<td>Household income</td>
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<th>• Content</th>
<th>• Genre</th>
<th>• Daypart</th>
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<td></td>
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<td>Ad Pod Position</td>
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<td>Creative Length</td>
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<tr>
<th>Impressions</th>
<th>• Creative</th>
<th>• Brand</th>
<th>• Industry</th>
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WHAT WE FOUND...
29% OF THE TIME,
THERE’S NO ONE
IN THE ROOM
WHEN AN AD AIRS
The TV viewability problem is similar to that of digital video.

Digital viewability among served ads:
- 31% non-viewable
- 69% viewable

TV viewability among aired ads:
- 29% non-viewable
- 71% viewable

Digital Viewability Source: Extreme Reach, October 2018
TV Viewability Source: TVision Performance Metrics
NO MARKETER/INDUSTRY IS IMMUNE

TV Viewability by Industry Vertical

<table>
<thead>
<tr>
<th>Industry</th>
<th>Viewable Ads</th>
</tr>
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<tbody>
<tr>
<td>Pharmaceutical</td>
<td>75%</td>
</tr>
<tr>
<td>Insurance</td>
<td>71%</td>
</tr>
<tr>
<td>Grocery</td>
<td>71%</td>
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<tr>
<td>Recreational</td>
<td>65%</td>
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</table>

Source: TVision Performance Metrics
TV’S VIEWABILITY PROBLEM ISN’T LIMITED TO ANY ONE DAYPART

PRIME, THE MOST VALUABLE SLOT, DOESN’T HAVE THE GREATEST VIEWABILITY.

Source: TVision Performance Metrics
IN GENERAL, FIRST POSITION IN AD POD MAY NOT BE WORTH A PREMIUM

TV Viewability by Position in Ad Pod

- 72.2% FIRST IN POD VIEWABILITY%
- 70.3% MIDDLE OF POD VIEWABILITY%
- 69.9% LAST IN POD VIEWABILITY%

Source: TVision Performance Metrics
LONGER ADS HAVE HIGHER VIEWABILITY...

TV Viewability by Ad Length

But doubling the length does not double the viewability, so the cost of longer ads must be considered.
NOT ALL TV IMPRESSIONS ARE EQUALLY VALUABLE

Targeting Effectiveness by Brand

Even when an ad is served and viewable, it might not be reaching the most valuable audience.

Source: TVision Performance Metrics
WHILE PRIME DOESN’T BOAST THE GREATEST VIEWABILITY, IT DOES HAVE HIGH ATTENTION

Attention to Viewable Ads by Daypart

<table>
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<tr>
<th>Daypart</th>
<th>Attention to Viewable Ads</th>
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<tbody>
<tr>
<td>Prime</td>
<td>Indexed to Average Attention to Viewable Ads</td>
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IMPLICATIONS
VIEWABILITY ISN’T JUST FOR DIGITAL.
IMPLICATIONS

1. **LEVERAGE NEW TV MEASUREMENT TECHNIQUES, ESPECIALLY WHERE MEDIA INVESTMENTS ARE HIGHEST**

2. **ADJUST CAMPAIGN PLANS TO ACCOUNT FOR DISCREPANCY BETWEEN PLANNED REACH AND ACTUAL VIEWABILITY**

3. **TAKE ADVANTAGE OF HIGHER VIEWABILITY IN SLOTS BEYOND PRIMETIME AND AIRING YOUR AD FIRST**
THANK YOU