EYES ON SCREEN

Measuring ad attention in-cinema versus at-home

The industry has made significant strides in one of the most vital metrics

V I S U A L   A T T E N T I O N

Eye Tracking Technology

Computer Vision Technology

capturing attention through panels like TVision

T»VISION

Predictive Attention Scores

through partners like Adelaide

Adelaide

MAGNA MEDIA TRIALS   SV SCREEN VISION MEDIA

WITH CINEMA AD SPEND ON THE RISE

$417M 2023

$536M 2027 E

● ● ● Brands need to understand the role cinema plays in the media mix and what sets cinema apart from other video media

MAGNA MEDIA TRIALS

SV SCREEN VISION MEDIA

THE PLOT.

▶ How much attention do consumers pay to ads shown in-cinema vs. on TV & digital platforms?

▶ How memorable is a single ad exposure in-cinema ?

CINEMA AD ATTENTION
Proprietary research by MAGNA

TV AD ATTENTION
TVision

DESKTOP/MOBILE AD ATTENTION
Adelaide

Cinema Ad Attention Measurement

- Recruited 171 moviegoers from Sept 11 -Sept 13

- All recruited viewers were 18 or older

- Infrared cameras were used to track moviegoers' attention in real time

- 11 ads were aired in the pre-show to the moviegoers

Location: Milwaukee, WI

Brand verticals tested:

- Auto
- Entertainment
- Shipping
- Telecom
- Gaming
- Beauty/skincare
- Pharma
- Insurance
- Fast Food

Eye Tracking Mins ~1,900

Ad Verticals 9

Ad Lengths 4

MERZ AESTHETICS® | CHIPOTLE MEXICAN GRILL | T Mobile

A regular trip to the movies

Viewers picked a movie and showtime across 3 different genres

Viewers watched movie in a movie theater

Viewers had the option to bring friends along for the movie

Viewers had complete flexibility (for example, to enjoy snacks, leave the theater, use the bathroom) at anytime as they typically would
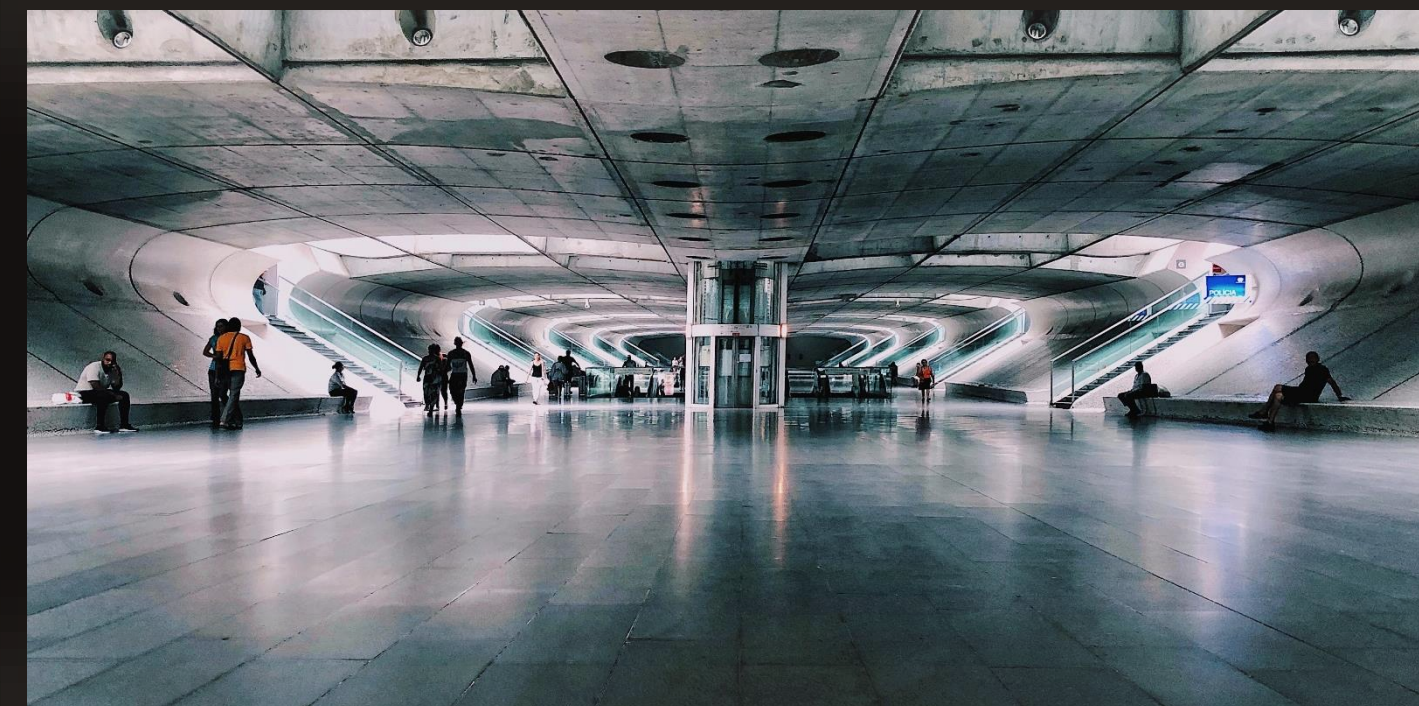
CTV & LTV

TVision measures attention to content by sampling televisions in homes, installing measurement equipment at the television sets, and passively monitoring audio coming from the television to identify active content.

They assess the person's visibility to the television to determine opportunities to see and track the person's eyes on the television to measure actual attention.

T▶VISION

# At Home Ad Attention Measurement

MOBILE & DESKTOP

Adelaide measures attention to content and ads using a machine-learning model that processes media exposure data and eye-tracking research. The model is trained using full-funnel outcome data to ensure attention ratings are predictive of outcomes from awareness to purchases.

The AU metric rates attentive media quality on a 0-100 scale, allowing brands to compare the value of paid media across platforms such as display, video, walled gardens, CTV, Cinema, Linear, and Audio.

Adelaide

Attention.
Quantified.
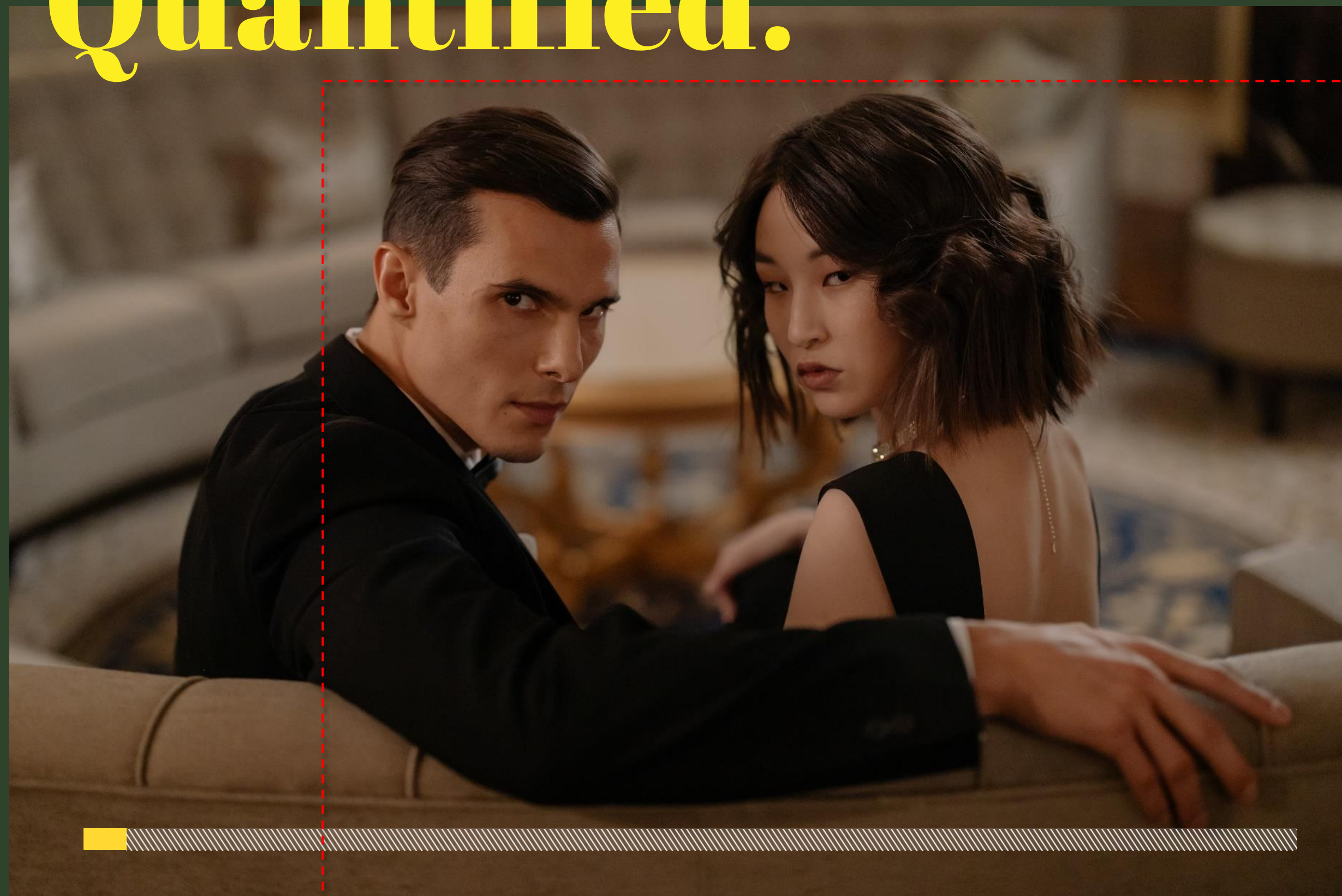
2 VIEWER ATTENTION

3 EYES ON SCREEN

1 AD ON SCREEN

FINDING#1

Ads in cinema garner 3X more attention than TV ads

VISUAL AD ATTENTION
% OF TOTAL AD TIME WITH VISUAL ATTENTION

[%]

94

30

[%]

TOTAL TV

CINEMA

Cinema n= 171; TV n= 125,008 ad airings
Cinema lab data & TVision performance metric data were used, collected in Q2 2023
Note: Total TV = CTV + LTV

MAGNA MEDIA TRIALS   SV SCREEN VISION MEDIA
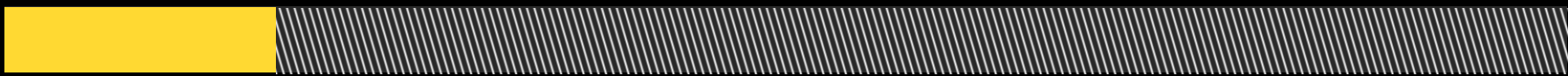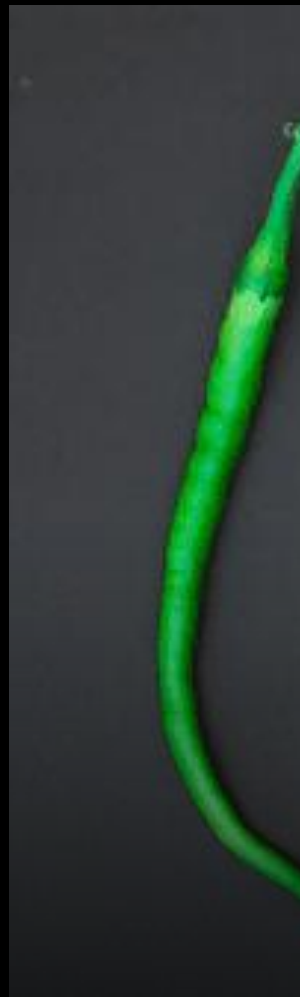
In cinema, viewers watch almost the entire ad; on TV it's just a third

Brands can consider prioritizing storytelling to take advantage of higher viewer attention for longer periods of time

VISUAL AD ATTENTION
AVERAGE VISUAL ATTENTION TIME OF :30 SECOND ADS

TOTAL TV **9** [Sec]

CINEMA **29** [Sec]

Cinema n= 171; TV n= 98,982 ad airings
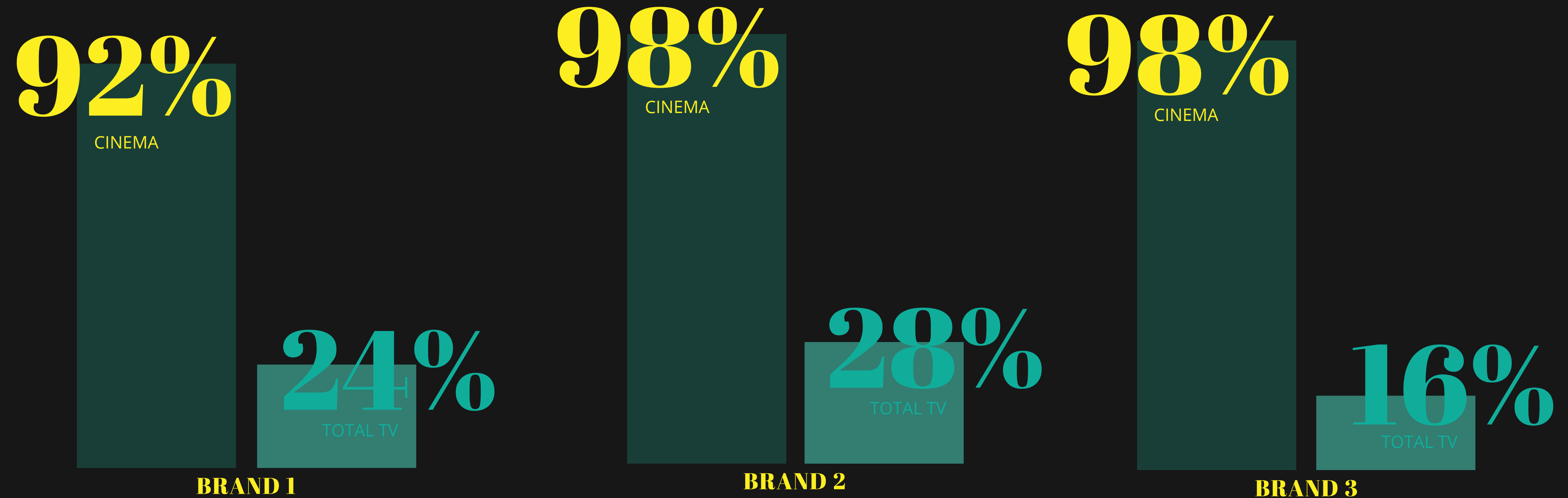*Cinema lab data & TVision performance metric data were used, collected in Q2 2023*
Note: Total TV = CTV + LTV

In fact, the exact same ad outperforms in-cinema

VISUAL AD ATTENTION
% OF TOTAL AD TIME WITH VISUAL ATTENTION SAME AD FOR EACH BRAND

92%
CINEMA

24%
TOTAL TV

BRAND 1

98%
CINEMA

28%
TOTAL TV

BRAND 2

98%
CINEMA

16%
TOTAL TV

BRAND 3

MAGNA MEDIA TRIALS

SV SCREEN VISION MEDIA
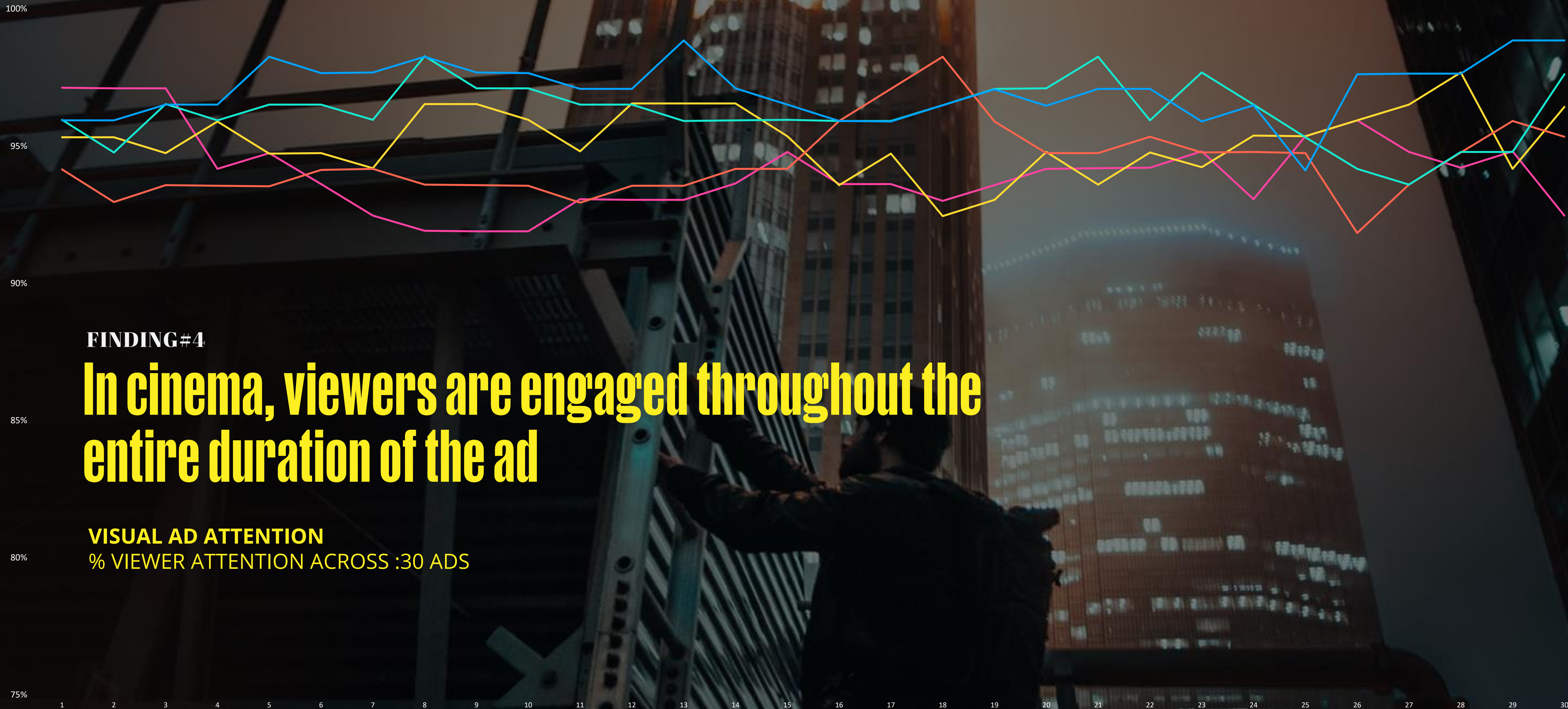
FINDING#4

In cinema, viewers are engaged throughout the entire duration of the ad

VISUAL AD ATTENTION
% VIEWER ATTENTION ACROSS :30 ADS

Cinema n= 171
Cinema lab data collected in Q2 2023

Cinema attention remains consistent regardless of ad length

VISUAL AD ATTENTION
AVERAGE ATTENTION TIME BY AD LENGTH
Comparison across the same brand and product

99%

128 sec ADVERTISEMENT

Brands get bang for their buck with longer ads in cinema

94%

MAGNA's past research has shown: **Double the cost doesn't always equal double the attention**

30 sec ADVERTISEMENT

Cinema n= 171
Cinema lab data & TVision performance metric data were used, collected in Q2 2023

MAGNA MEDIA TRIALS

SV SCREEN VISION MEDIA
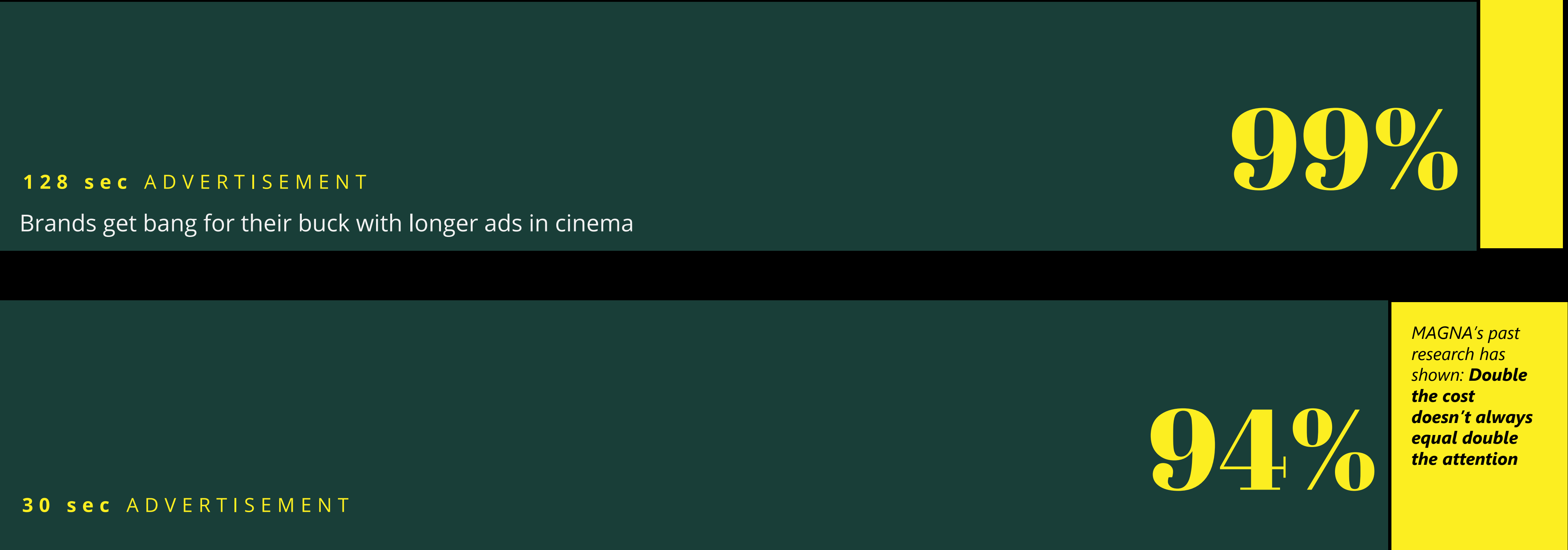
MINDSET MATTERS

THE ROLE OF ATTENTION AND MEMORY IN-CINEMA

The cinema environment delivers a receptive audience

OPINION OF ADS IN CINEMA
% STRONGLY/SOMEWHAT AGREE

I was open to seeing ads at that time — 59%

The ads were enjoyable — 59%

The ad offered valuable information — 51%

Cinema survey data, n= 1220

Cinema attention drives message recall

Over half of viewers correctly recalled the brands' message from just a single exposure

51%

MESSAGE RECALL FROM IN-CINEMA ADS
% RECALLED

Cinema survey data, n=1220

LOGO NOT PRESENT WITHIN 5 SEC OF THE AD

62%

FINDING#8

Cinema ads are just as memorable regardless of logo presence in the first 5 seconds

Brands have more flexibility with ads in-cinema and may not have to adhere to creative best practices

LOGO PRESENT WITHIN 5 SEC OF THE AD

60%

Cinema survey data
Logo present within 5 sec. of the ad: n= 1197, Logo not present within 5 sec. of the ad: n= 513

MAGNA **MEDIA TRIALS** SV SCREEN VISION MEDIA

ATTENTION + MEASUREMENT

QUANTIFYING THE VALUE OF ATTENTION

Cinema captures the most attention across all video devices

BY PLATFORM, **ADELAIDE AU SCORES**

Cinema garners 87% higher AU score than online video (eOLV)

71
CINEMA

62
CTV

55
LTV

40
OLV DESKTOP

39
OLV TABLET

35
OLV MOBILE

FINDING#10

In addition to more attention overall, cinema is more cost efficient

CPM PER SECOND OF ATTENTION

Cinema

$1.37

Total TV

$2.27

Cinema ad attention costs $1.37 per second for every 1,000 people

MAGNA MEDIA TRIALS SV SCREEN VISION MEDIA

In summary…

insights

FINDINGS

Cinema delivers 3x more attention than TV: In-cinema ads allow brands to connect with a highly attentive audience, allowing for more creative storytelling and differentiation from competitors

Cinema attention drives memory: A single impression in-cinema delivers brand recall and message recall, emphasizing the impact of each impression

Cinema offers cost efficiency: Leveraging in-cinema is more cost efficient for brands, as brands receive more attention for less media budget

IMPLICATIONS

Opportunity to lift and shift creative: Brands can employ the same TV creative in-cinema, yielding much higher attention

Consider non-traditional creative: Advertising in-cinema provides brands with creative freedom for storytelling, eliminating the need to follow specific branding rules

Cinema allows opportunity for longer ads: Investing in longer ads pays off in-cinema, as brands receive the attention they are paying for

MAGNA MEDIA TRIALS   SV SCREEN VISION MEDIA