EYES ON SCREEN

Measuring ad attention in-cinema versus at home
The industry has made significant strides in one of the most vital metrics: **Visual Attention**

- **Eye Tracking Technology**
- **Computer Vision Technology**
  - capturing attention through panels like TVision
- **Predictive Attention Scores**
  - through partners like Adelaide
WITH CINEMA AD SPEND ON THE RISE

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

Source: “US Advertising Forecast”, MAGNA Global Website
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 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

Brand verticals tested:
- Auto
- Entertainment
- Shipping
- Telecom
- Gaming
- Beauty/skincare
- Pharma
- Insurance
- Fast Food

Location: Milwaukee, WI

Eye Tracking Mins ~1,900
Ad Verticals 9
Ad Lengths 4
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
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.

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.
Attention. Quantified.
On average, 94% of the ad captured the attention of viewers in cinema.

**FINDING #1**

Ads in cinema garner 3X more attention than TV ads

**VISUAL AD ATTENTION**

% OF TOTAL AD TIME WITH VISUAL ATTENTION

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
FINDING #2

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.

**FINDING #3**

**VISUAL AD ATTENTION**

% of total ad time with visual attention same ad for each brand.
FINDING #4

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

VISUAL AD ATTENTION
% VIEWER ATTENTION ACROSS :30 ADS
FINDING#5

Cinema attention remains consistent regardless of ad length

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

128 sec ADVERTISEMENT
Brands get bang for their buck with longer ads in cinema

99%

30 sec ADVERTISEMENT

94%

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

Cinema n= 171
Cinema lab data & TVision performance metric data were used, collected in Q2 2023
MINDSET MATTERS
THE ROLE OF ATTENTION AND MEMORY IN-CINEMA
FINDING #6

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
FINDING #7

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
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

AIDED AD RECALL FROM IN-CINEMA ADS
% RECALLED

LOGO NOT PRESENT WITHIN 5 SEC OF THE AD
62%

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
ATTENTION + MEASUREMENT

QUANTIFYING THE VALUE OF ATTENTION
FINDING #9

Cinema captures the most attention across all video devices

BY PLATFORM, ADELAIDE AU SCORES

CINEMA: 71
CTV: 62
LTV: 55
OLV DESKTOP: 40
OLV TABLET: 39
OLV MOBILE: 35

Cinema garners 87% higher AU score than online video (eOLV)
FINDING #10
In addition to more attention overall, cinema is more cost efficient

CPM PER SECOND OF ATTENTION

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

CPMs used are national averages
Source: TVision data, Screenvision CPM, MAGNA proprietary study
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.
THE END
Thank You