

GAME ON

How to Use Emotion to Drive
Advertising Impact in Sports

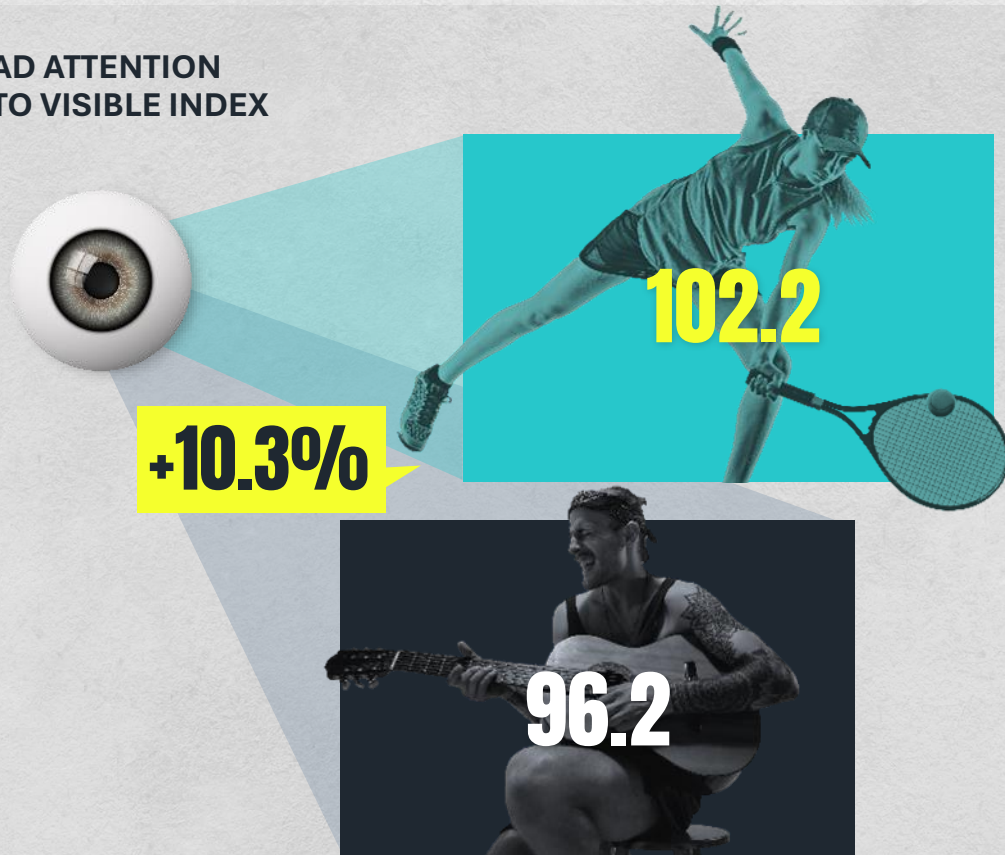
M/GNA MEDIA TRIALS + Disney Advertising



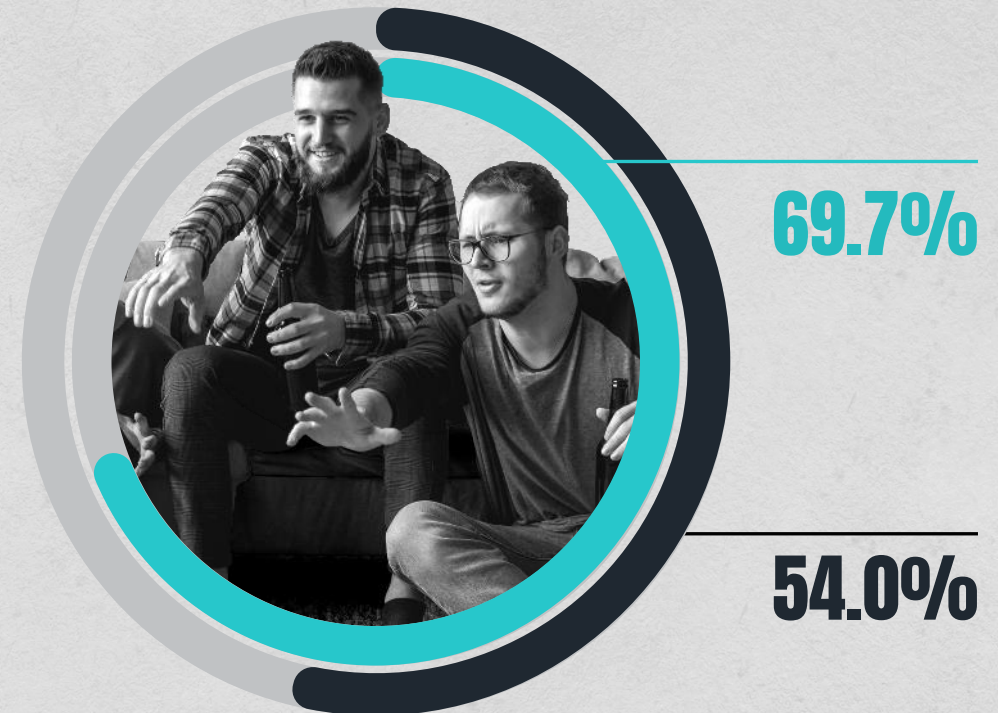
WE KNOW SPORTS BRING BOTH THE ATTENTION AND THE AUDIENCE

■ Live Sports ■ Non-Sports

AD ATTENTION TO VISIBLE INDEX



CO-VIEWING RATE

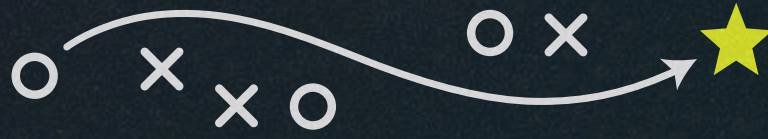


Source: TVision CTV & TV Trends Year In Review – December 2023

Attention to Visible Index: Measures how attentive viewers are while in the room. 100 is the benchmark for linear TV.

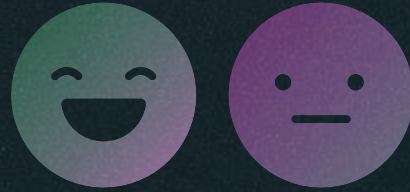
Read as: Viewers pay more visual attention to ads in sports than non-sports. Visual ad attention over indexes by 10.3% compared to non-sports. Viewers are also more likely to be co-viewing - 69% of the time during sports content vs. 54% of the time during non-sports content.

HOW CAN BRANDS



CONNECT TO THE

MOODS



AND



MOMENTS



IN SPORTS TO DRIVE IMPACT

DISNEY MAGIC WORDS

Using technology and data to help advertisers connect with key moments and emotions in premium content

1

TAXONOMY IDENTIFICATION AND METADATA TAGGING

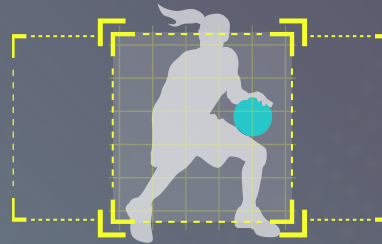
Disney's data scientists run Video AI models to determine the object, dialogue, locations, moods/emotions, etc. of each scene; and then roll them into Magic Words taxonomy



2

CREATIVE OPTIMIZATION

The tech then analyzes scenes and serves up relevant ads, helping advertisers place the right creative soon after the most impactful moments



Brands can reach the right audience at the right moment, effectively harnessing relevancy and emotion for impact

2-PRONGED METHODOLOGY

VISUAL ATTENTION TRACKING



Leveraged TVision data + ESPN's second by second "probability win %" to understand...
Attention to ads in sports content after exciting moments

AD EFFECTIVENESS TESTING



Controlled testing of ads in sports to quantify...
The impact on brand metrics when ads are aligned to specific scenes and emotions during sporting events

Visual Attention METHODOLOGY

WHO

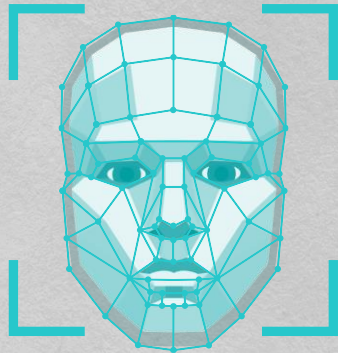


Nationally representative panel



Participants opted to install TV visual attention detection technology in their household

HOW



Programming and ads captured via ACR (automatic content recognition)

Attention measured using computer vision algorithms

WHAT

THE DATA

ESPN games

12/1/23-5/31/24 date range

13,188 individuals tracked

152,510,707 seconds of game time

40,475,011 seconds of ad time

173,293 number of tracked ads

THE METRICS



Visual Ad Attention Time:
of seconds of attention (looking at screen) during ad play



Exciting Moments:
Game changing moments identified by wide swings in team win probabilities



Ad Sentiment:
AI video calculated ad sentiment score

AD EFFECTIVENESS

THE SCOPE

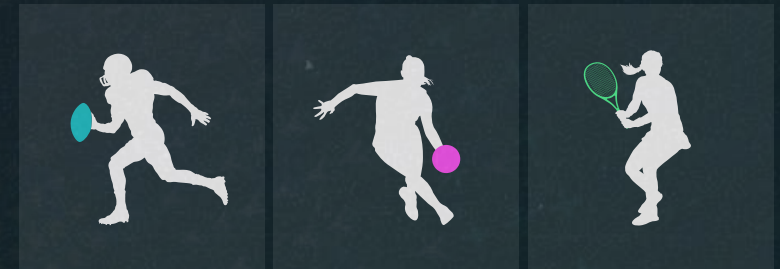
Sports fans (n=3,610) were recruited from representative online panel. In the survey, fans watched content and were served ads at random. All ads were mid-roll video. The research scope was extensive, including a range of brand verticals and sporting events, as well as multiple strategies for aligning ads with content.

NCAA FOOTBALL

NCAA WOMEN'S BASKETBALL

WOMEN'S TENNIS

TYPE OF SPORTS



- Each included multiple games
- NCAA Football included Bowl games (e.g., Cotton Bowl, etc.) and non-Bowl games

BRAND VERTICALS

- ★ Travel
- ★ Telecomm
- ★ Fast Casual Dining

TEST CELLS

CONTROL ADS

Ad for public service announcement



ADS WITHOUT MAGIC WORDS

Ad for the test brand delivered in random ad slot, without regard to alignment



ADS WITH MAGIC WORDS

Ad for the test brand delivered after scene that matches in mood or excitement



Examples include:

Ad featuring excitement served after unexpected score

TOP

5

INSIGHTS

Game-Changing Insights
on Advertising in Sports



30:00

AD

INSIGHT

#01

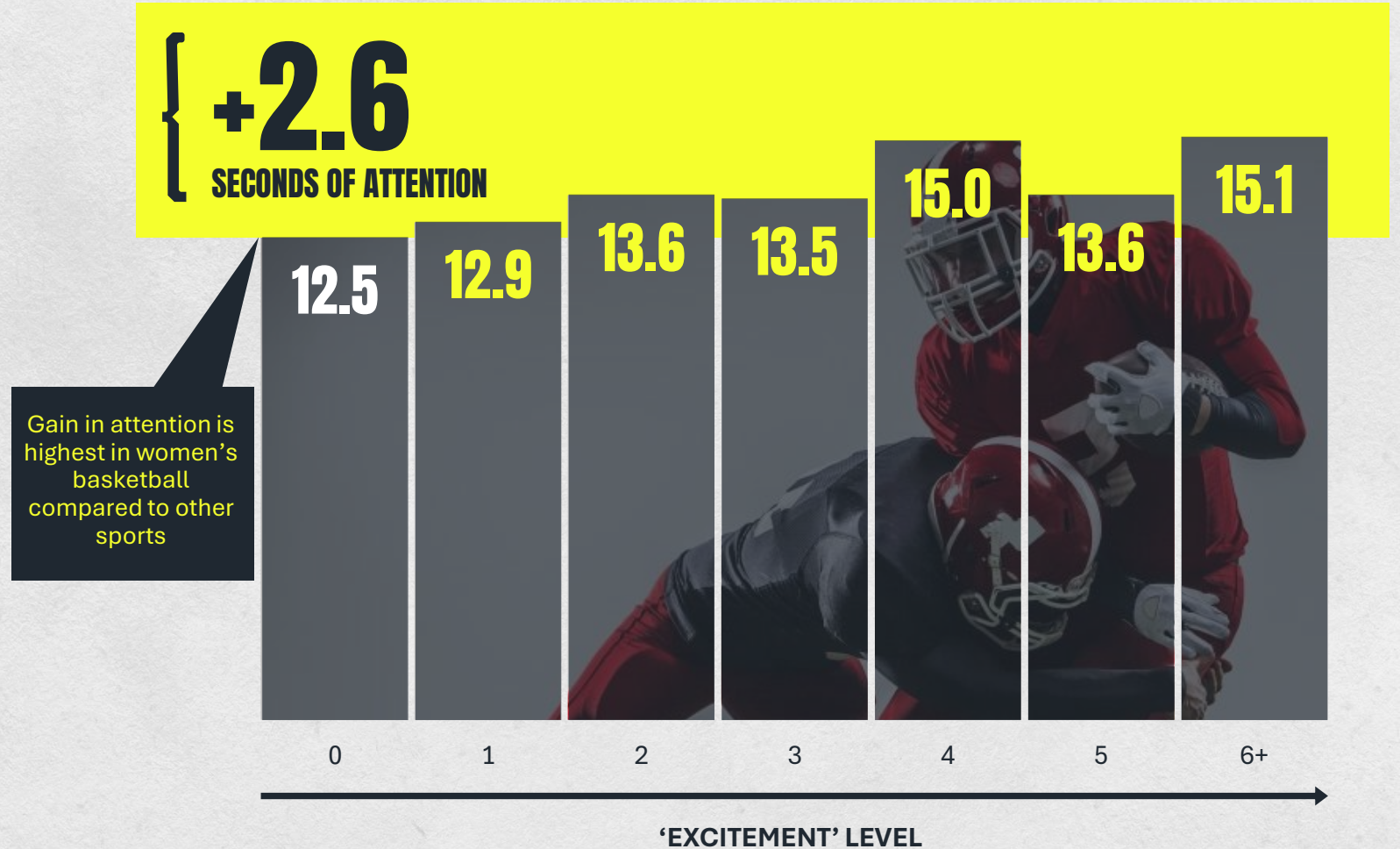


AD ATTENTION PEAKS AFTER EXCITING MOMENTS IN SPORTS

Advertisers gain an additional
2.6 seconds of attention

VISUAL AD ATTENTION TIME AFTER EXCITING MOMENTS

Seconds of Ad Attention



Source: TVision Performance Metrics, 1H 2024 | Based on 30 second window after a key moment
Exciting Moments - Rate of change of win probability per second of wall clock (based on ESPN win probabilities)
Visual Attention Time: # of seconds of attention (looking at screen) during ad play
Read as: As excitement levels increase, so does ad attention. For an excitement level of 0, there was 12.5 secs of attention. At an excitement level of 6+, there was 15.1 secs of attention, resulting in an increase in attention by +2.6 secs (+21%)

INSIGHT

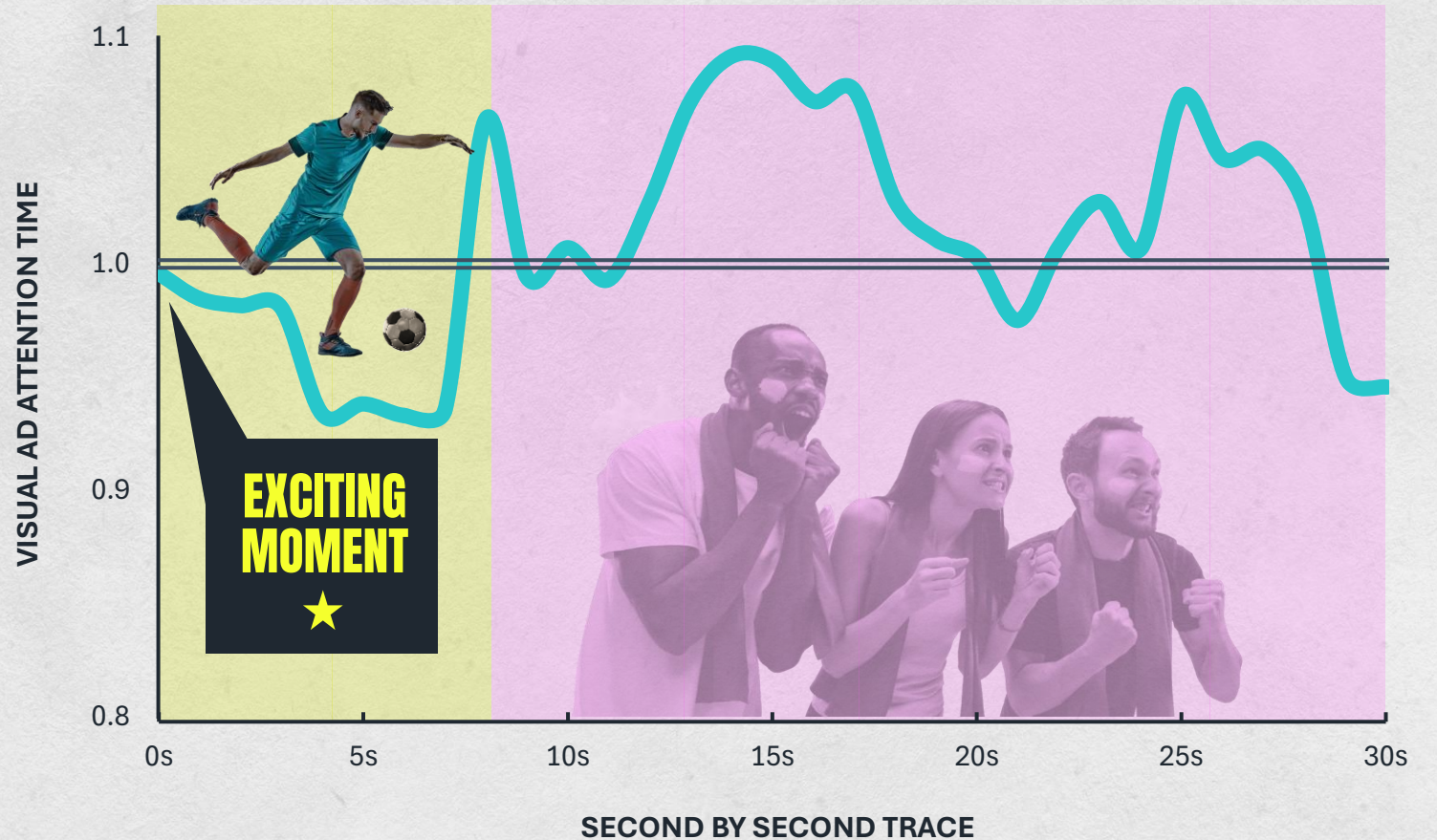


INCREASED BUMP IN AD ATTENTION LASTS ~25 SECONDS PAST THE EXCITING MOMENT

Interestingly, attention is not higher for the first 5 seconds after the exciting moment, potentially indicating viewers are looking at their phone or other people in the room

VISUAL AD ATTENTION TIME, SECOND BY SECOND Exciting Moments Indexed to Non-Exciting Moments

= Non-Exciting Moment — Exciting Moment



Source: TVision Performance Metrics, 1H 2024
Exciting Moments - Rate of change of win probability per second of wall clock (based on ESPN win probabilities)
Read as: In the first 5 seconds after an exciting moment, ad attention drops, followed by a steep increase

INSIGHT

#03

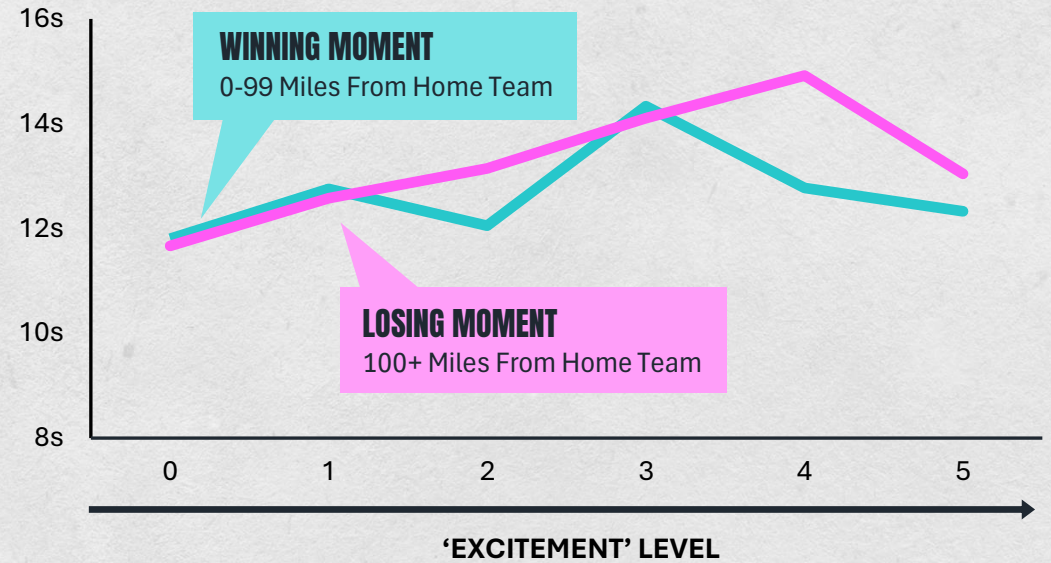


BOOST IN AD ATTENTION OCCURS REGARDLESS OF WHO VIEWERS CHEER FOR

Attention is amplified further when the ad is matched to the moment (e.g., positive sentiment ad aligned with winning moment)

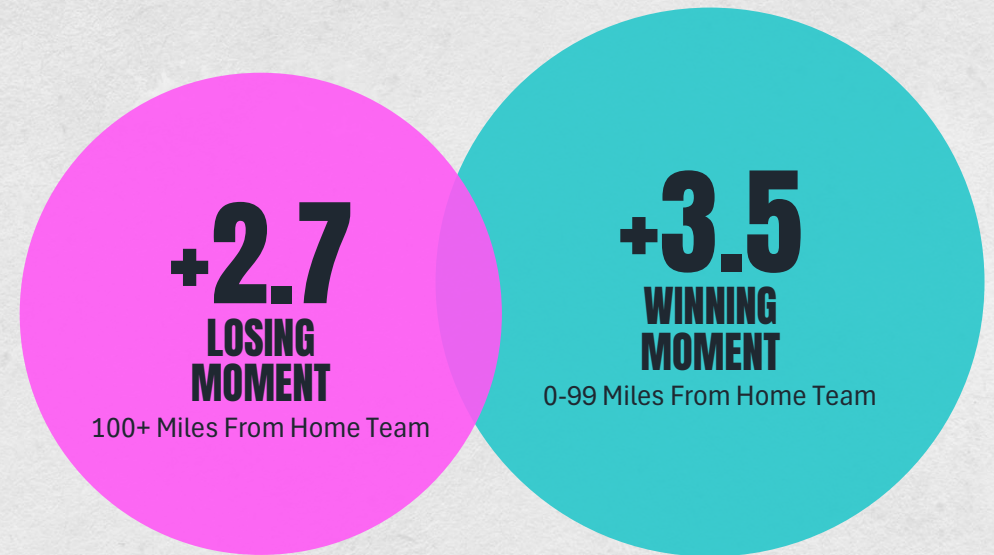
VISUAL AD ATTENTION TIME AFTER EXCITING MOMENTS, BY DISTANCE TO HOME TEAM

Seconds of Ad Attention



VISUAL AD ATTENTION TIME FOR POSITIVE SENTIMENT AD

Gain in Seconds of Attention (Positive Sentiment Ad - Neutral Sentiment Ad)



Source: TVision Performance Metrics, 1H 2024 | Based on 30 second window after a key moment
Sentiment of ad based on AI analysis

Winning moments defined by sudden change in probability of home team winning (amongst those who live within 100 miles of home team);
Losing moments defined by sudden change in probability of home team losing (amongst those who live within 100 miles of home team)

Read as: Ads after exciting moments have higher attention regardless of whether the moment is in favor of the home or away team. Attention to ad is particularly high when the moment and ad match (exciting moment for home team with positive sentiment ad)

INSIGHT



ADS ALIGNED TO THE MOOD AND MOMENT POSITIVELY IMPACT BRAND METRICS

IMPACT ON BRAND METRICS

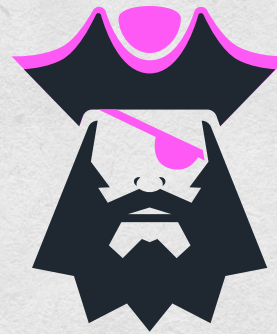
Delta (Test – Control)

■ Ads Without Magic Words ■ Ads With Magic Words

UNAIDED AD RECALL

+15 PTS[▲]

ADS WITHOUT MAGIC WORDS



VS



+21 PTS[▲]

ADS WITH MAGIC WORDS

BRAND FAVORABILITY



+3 PTS

+7 PTS[▲]

SEARCH INTENT



+4 PTS

+6 PTS[▲]

Source: Ad Effectiveness Data | Total Audience Control: n=430, With Magic Words: n=429, Without Magic Words: n=426

▲ : Significant difference between test and control groups at >=90% confidence

Read as: Ads With Magic Words have a higher unaided brand recall, favorability, and search intent in comparison to Ads Without Magic Words

INSIGHT



ALIGNING TO THE MOMENT HELPS THE CREATIVE GO FURTHER

Additionally, smart alignment generates excitement for brands across verticals, such as telecom, fast casual dining, and travel

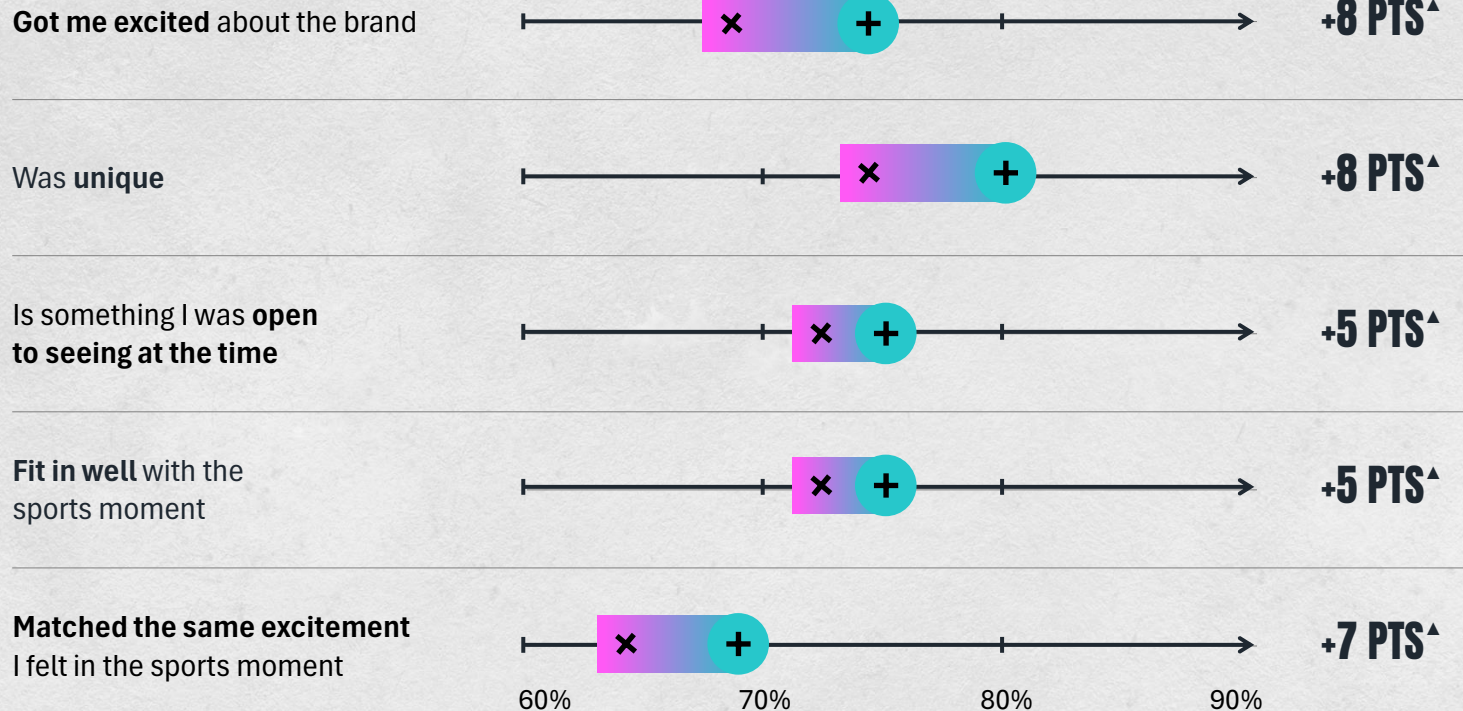
AD PERCEPTIONS

Delta (Ads With Magic Words – Ads Without Magic Words)

Viewers were also 5% more likely to be open to seeing the ad again with Magic Words

THE AD...

x Without Magic Words + With Magic Words



Source: Ad Effectiveness Data | Total Audience With Magic Words: n=429, Without Magic Words: n=426 ▲ : Significant difference between groups at >=90% confidence Read as: Ads with Magic Words are more likely to excite viewers, be seen as unique, fit well with the game, and match the sport's excitement compared to ads without Magic Words



FINDINGS

PEAK ATTENTION

Ads after exciting moments in sports garner more attention



EXCITEMENT IS EXCITEMENT

Boost in attentiveness occurs regardless of team loyalty



NCAA WOMEN'S BASKETBALL

Ad attention after exciting sports moments is especially high



MOOD MATCH = BRAND IMPACT

Ads aligned with relevant moments are more memorable and more effective at driving Brand Favorability and Search Intent



ATTENTION THAT LASTS

Higher attention lasts ~25 seconds post-excitement



CREATIVE WORKS HARDER

The creative itself is perceived more positively when aligned with relevant moments in sports, building brand excitement



A group of friends are gathered in a living room, celebrating. A woman in the foreground is shouting with her mouth wide open. Behind her, a man in a striped shirt is also shouting. In the background, another woman is holding a beer. On a coffee table in front of them, there are several burgers, a bowl of popcorn, and several beer bottles. The scene is lit with a cool, blue-toned light, creating a festive and energetic atmosphere.

THANK YOU

M/GNA MEDIA TRIALS

Disney Advertising