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THE ATTENTION COUNCIL

The ARF Attention Report

BY THE ARF & THE ATTENTION COUNCIL

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Background

The ARF has worked in conjunction with [The Attention Council] to gauge the level of interest in attention metrics. To that end, the ARF conducted a Qualtrics survey among its members and the Wonks community. The survey was taken in January 2022. In total there were 63 responses, 27 from the Wonks frame[1], 17 from the buy side (Advertisers and Agencies), 12 from research companies and seven from media, tech and other sectors. In this report, we will be most interested in the differences between the industry in general, researchers and the buy side. Given the samples, this should be understood as a largely qualitative study.

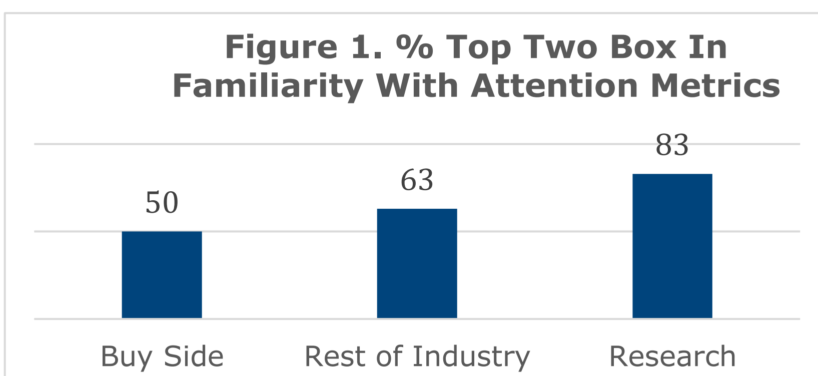
Executive Summary

While there is clear interest in attention metrics, throughout most sectors of the industry, there is clearly a difference between the buyers that would use them and researchers that are developing the metrics.

There is general agreement that attention metrics can and are being used for evaluating creative and ad effectiveness. The real opportunity for the growth of attention metrics is to get beyond creative testing and help buyers understand the effectiveness of media channels better. A specific example of this is the ability to understand how attention can help value different cross platform channels and how different screen sizes may differentially hold attention.

Familiarity With Attention Metrics

Figure 1 shows the percentage of respondents identifying top two boxes on a six-point scale of familiarity with attention metrics.



As in much of survey research, there are response biases towards those who are interested in the survey. There are about an equal number of respondents from the buy side and from research companies, the latter being the sellers of attention metrics. Therefore, it is not surprising that familiarity with attention

[1] We could not discern the sector when returned from the Wonks frame while member ambassadors were mailed through a unique, identifiable URL.

metrics is significantly higher among research companies who may either be collecting or thinking of collecting these metrics.

Use Cases

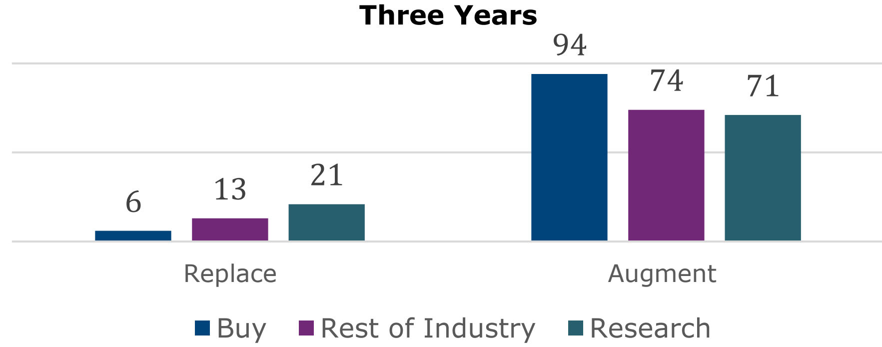
We asked if buyers had used attention metrics in the past and if so, for what use cases. It is not surprising that advertisers and agencies are using biometrics and neuro to do creative and copy testing. More surprising is that some users are testing the effectiveness of different media channels at holding attention. While researchers were likely to express similar uses, they were more likely to suggest planning as a use case.

Typical Buy Side Use Cases

- Creative and Copy Testing
- Effectiveness of Various Media Channels at Holding Attention

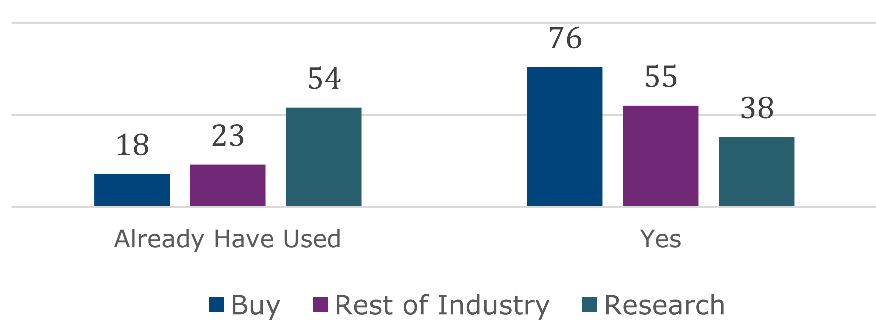
Figure 2 shows the percentage of respondents who believe that attention metrics will replace or augment current metrics in the next three years. One hundred percent of the buy side believes that attention metrics will play some role. It is also clear that research companies, likely working in the area are impacting the rest of Industry results.

Figure 2. % Believing Attention Metrics Will Replace or Augment Current Metrics In the Next Three Years



While Figure 3 suggests that almost one in five on the buy side have already used attention metrics for buying or optimization, the selection bias of the research response is evident in that more than half of the research respondents have already used attention metrics.

Figure 3. % Saying They Would Consider Using Attention Metrics for Media Buying or Optimization



Among those buyers who said they definitely or probably would consider using attention metrics, Figure 4 confirms that creative effectiveness and understanding how media channels hold attention are the most likely future uses.

Figure 4. % of Buy Side That Would Definitely or Probably Consider Using For:

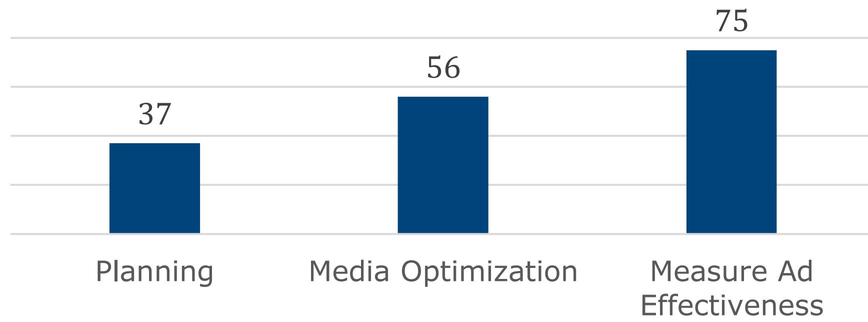
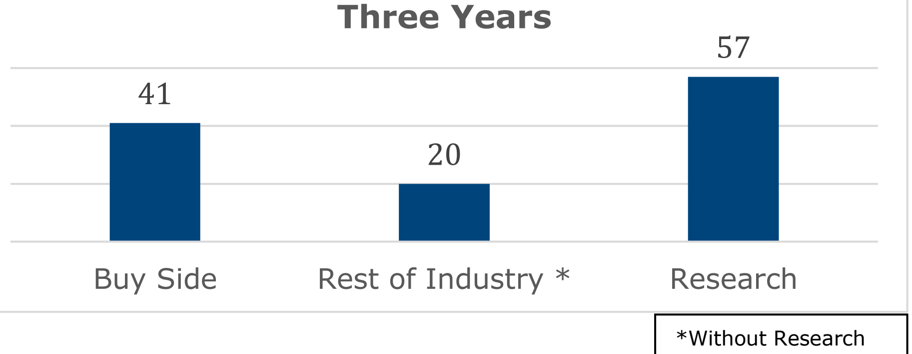


Figure 5 identifies a different relationship between advertisers, agencies and the rest of the industry. That is, like the researchers, who seem to be already working in attention, the buy side appears bullish on whether attention metrics will serve as a primary KPI for media buying within the next three years.

Figure 5. % Saying Attention Metrics Will Be a Primary KPI within the Next Three Years



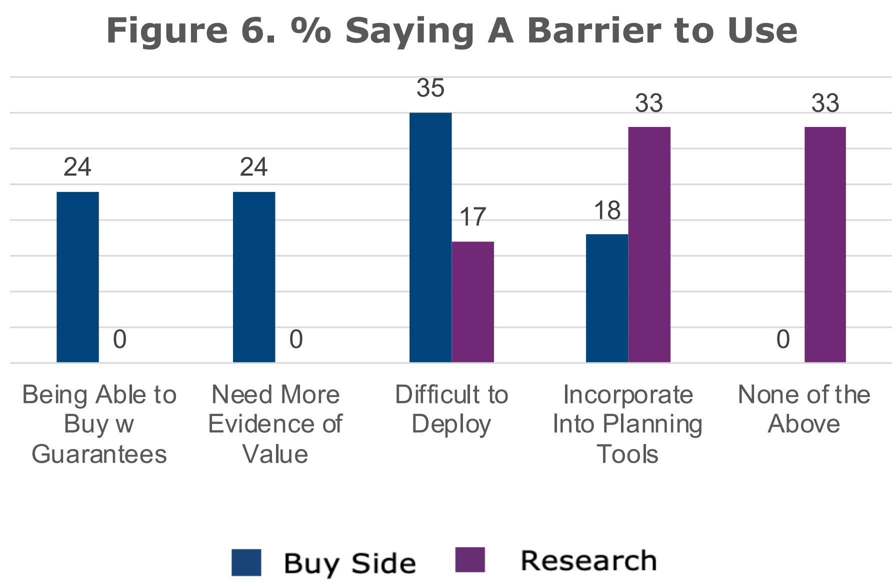
Interest in Learning More

We also asked if respondents wanted to learn more about attention metrics and if so, what they wished to learn. Advertisers and agencies responded with a variety of interests. Clearly, there is an understanding of the value in creative testing.

> Buy Side Interests
>
> - Attention to different screen sizes
> - Shelf life of attention metrics
> - Best practice in media planning
> - Different methods of collecting attention metrics
> - How to use beyond creative testing

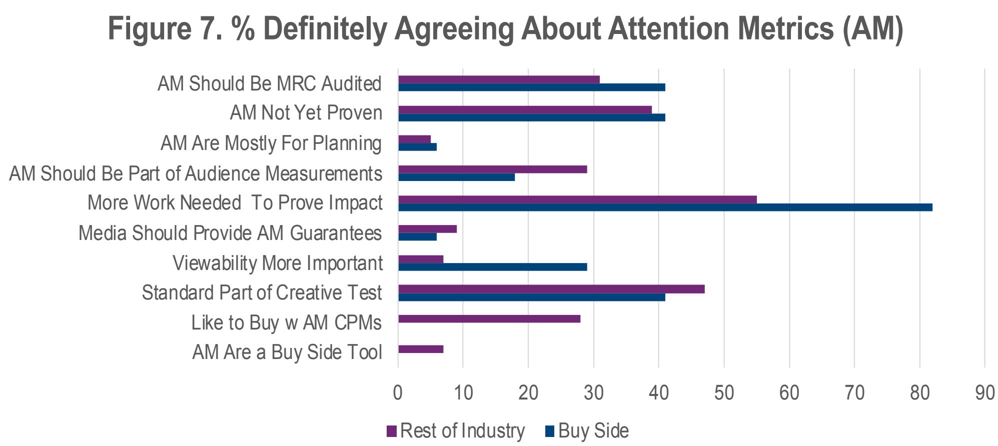
Recall that in Figure 4, media planning was less likely to be considered. Buy side interests show a need for an industry conversation about how attention metrics can support media planning. Additionally, we asked what would increase their use of attention metrics. There was a strong consensus among buyers that connection to behaviors and outcomes would support their use.

Figure 6 illustrates the marked difference in opinion between buyers and researchers with respect to the remaining barriers to use. Researchers do not see the same need for further evidence of value nor the need for guarantees. Buyers focus on the difficulty of deployment, guarantees and additional evidence.



Attitudes Towards Attention Metrics

We conclude with a battery of attitudes towards attention metrics. In Figure 7, we report those results for percentage who definitely agree rather than top two box, because it was in the top box where there were clearer differences between buyers and the rest of the industry. For buyers, viewability and the need for more impact work are more important. For the moment, buyers are less likely to suggest that attention metrics should, at present, be part of the currency or factored into CPMs.

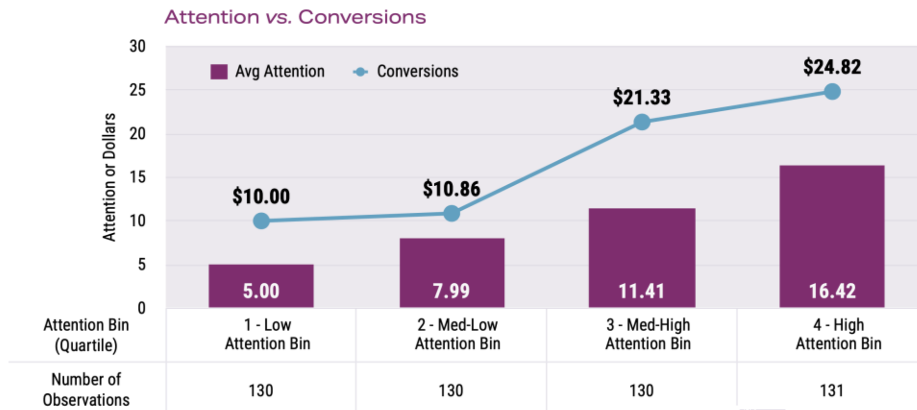


In the end, the value of attention metrics may be best realized as they contribute beyond creative and help understand how different media and different screen sizes may better hold attention to an ad and ultimately, how attention drives behaviors.

Point - Counterpoint

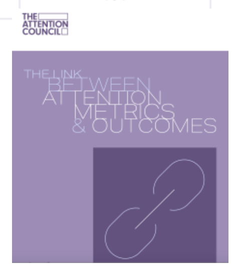
The US survey suggested, qualitatively, that buyers wanted to see attention linked to outcomes and hoped attention metrics could be useful in media planning. The UK based Attention Council (TAC) recently issued a report summarizing a meta-analysis of 50 different case studies from multiple countries that do explicitly link attention to outcomes and in a way that directly yields value to the media planning process.

For example, one such study in the financial sector shows that "*high attention media drove 2.5 times the number of transactions for the bank compared to low attention media.*"



This is just one of many case studies in the report relating attention to transactions, brand favorability and several other brand lift KPIs.

Attention is explicitly referenced in its contribution to media planning in that media which are first classified as high, medium and low attention platforms. One study concludes that attention is more important than viewability – of significance to the valuation of scrolling media.



However, there is also a substantial body of literature that suggests the efficacy of low attention advertising for certain media and categories. Joe Wilke, president of BASES offers the following view:

> *The idea that conscious (visual) attention is a prerequisite for advertising effectiveness is a very "System 2" view – a view that flies in the face of modern neuroscience. There is a large and growing body of evidence that advertising works as much through implicit, non-conscious pathways in our brains as explicit, conscious pathways. Although it's seductive to reduce advertising effectiveness to a simple construct like conscious attention, neither advertising nor our brains are that unidimensional.*

There is of course a vast literature on System 1 advertising. That is advertising images and messages that the "reptilian" portion of our brains absorb fast, instinctively and effortlessly. Erik Du Plessis, author of *The Advertised Mind* and executive at Millward Brown, suggests:

> *Advertising by its very nature works at the lower end of this (attention) continuum. And it appears that over time, the same ad falls lower down this continuum.*

That said, some in the neuro field such as Duan Varan of Media Science have suggested that since advertising can work at all levels of attention, perhaps we should focus on those moments of "inattention".

Finally, for an extended literature review on the subject of attention, see the ARF's Attention Knowledge At Hand.