Ipsos/Google Advertising Attention Research:

Video ads and viewer attention
Research Objectives

Ipsos/Google conducted two separate studies with U.S. consumers to understand:

- The difference in attention paid to TV advertising and YouTube mobile advertising in a natural viewing environment (Attention In-Home Eye-Tracking Study)
- The impact of TV ads and YouTube mobile ads on brand metrics such as awareness and consideration (Brand Lift In-Home Controlled Experiment)
Attention Eye-Tracking Study
Natural Research Design

1. In-Home Passive Eye-Tracking

TV Viewers were tasked with wearing eye-tracking glasses for at least 90 minutes during their regular TV viewing sessions at home.

A separate camera installed in the home facing the TV, in order to determine the length of advertising time.

YouTube Mobile Viewers were tasked with wearing eye-tracking glasses for at least 45 minutes during their regular YouTube mobile viewing sessions at home.

A passive tracking app was installed on participants’ smartphones to determine the length of advertising time.

Note on methodology:
The different lengths of the task (90 min on TV and 45 min on YouTube) are reflecting the different real average lengths of the sessions. Comparative claims established in the analysis are relative to those different lengths, and are thus accurate.
All respondents completed a 5-minute follow-up survey to provide context around their observed behavior.
The Approach in Numbers

**Total Sample**
- 173 TV/YouTube Mobile Viewers who are 18-54 years old in the Cincinnati area

**2,953 ads observed**

**277 ads observed**
- (166 skippable /111 non-skippable)

**87 18-54 year olds Android owners who watch YouTube monthly**

**86 18-54 year olds who watch at least 5 hours of TV per week**

**2,676 ads observed**
Attention: definition of the metric

**Visual Attention**
- Looking at the ad
- Looking at another part of the screen, but the ad is visible
- Looking at countdown / skip button

**Multitasking**
- Looking at other screens
- Looking at people / other areas

**Switching**
- Changing Channels
- Clicking on another video / link
- Minimizing the ad
- Closing the YouTube app

**Skipping**
- Fast forwarding
- Skipping the ad

*Visual Attention is defined as:* time looking at advertising as a percent of advertising time
55% of TV advertising time is NOT paid attention to

Visual Attention is defined as: time looking at advertising as a percent of advertising time

- 45% of advertising time is spent looking at advertising
- 26% of advertising time is spent multitasking, switching or skipping
- 14% of advertising time is spent switching
- 15% of advertising time is spent skipping

25% of advertising time is spent looking at other screens (multi-screening)

55% of advertising time is spent multitasking, switching or skipping
55% of TV advertising time is NOT paid attention to

- The majority (62%) of all YouTube mobile advertising, paid and non-paid, receives viewers' attention compared to only 45% of TV.
- Paid YouTube mobile advertising is 84% more likely to receive attention than TV advertising (83% for Paid YouTube mobile ads and 45% for TV ads).

*Paid Mobile Advertising Time includes YouTube video ads that are played for at least :30, or in full if the ad is less than :30.

**Visual Attention is defined as:** time looking at advertising as a percent of advertising time.

Capital letters indicate statistically higher at 95% c.l.; lower case letters indicate statistically higher at 90% c.l.
Mobile YouTube viewers do not multitask during ads to the degree that TV viewers do; TV viewers annoyed by amount of ads

73% of TV viewers agree that the amount of TV ads during their favorite shows is annoying

(2,953 ads observed, n=86 TV viewers and n=87 YouTube viewers, 18-54 year olds)

U4. What do you typically do when an ad break comes on during broadcast or cable TV, whether live or recorded? T1. To what extent do you personally agree or disagree with each of the following statements? 5-point scale, Top 2 Box (Strongly Agree/ Somewhat Agree) (Base: n=86 TV viewers)

73% of TV viewers agree that the amount of TV ads during their favorite shows is annoying

Statistically higher at 95% c.l.
Brand Impact
Controlled Experiment
Controlled Experiment Design

Total Respondents (n=1,572); 9 Ads Tested

- **TrueView+TV**
  - n=248
  - 6 of 20 YT videos, 3 after TrueView / 25 min TV content with 2 breaks with 4 ads each
  - Distraction questions on content

- **TV**
  - n=317
  - 25 min TV content with 2 breaks with 4 ads each
  - Distraction questions on content

- **Control**
  - n=1,007
  - Randomize: 50% desktop / 50% mobile
  - No Control Cell Exposure on Day 2

Day 1 Exposure #1

Day 2 Exposure #2

 BRAND METRICS

Randomize: 50% TV Day 1 / 50% YT Day 1

BRAND METRICS
The combination of TrueView paid views and TV results in stronger lift than just TV alone on most brand metrics.

- % Increase TV versus Control
- % Increase TrV Views + TV versus Control

Showing statistically significant differences.

**Base**: Total n=1,572 males and females 18 to 49 years old
TrueView+TV Paid views Test Cell (248); Control Cell (1,007); TV Test Cell (317)

*Green numbers represent statistical significance vs. other test cell at 95%/90%*
Brand Lift: definition of metrics

**Top of Mind Brand Awareness**
Which brands from <category> do you know? First Answer provided

**Unaided Brand Awareness**
Which brands from <category> do you know? All Answers provided

**Brand Awareness**
Which of the following brands of <category> have you heard of?

**Top of Mind Ad Recall**
Which brands of <category> have you seen advertising for recently? First Answer provided

**Unaided Ad Recall**
Which brands of <category> have you seen advertising for recently? All Answers provided

**Ad Recall**
Which of the following brands from <category> have you seen advertising for recently?

**Purchase Intent**
The next time you <purchase/hire> <category>, which brand are you most likely to <purchase/hire>?

**Consideration**
Next time you purchase/hire <manufacturer/brand>, how likely are you to consider <purchasing/purchasing from/hiring> each of these brands?

**Recommendation**
How likely are you to recommend each of these brands to a friend or colleague?

**Closeness**
How close do you feel to <INSERT BRAND (A, B or C)>?