Ipsos/Google Advertising Attention Research:

Video ads and viewer attention

Ipsos Connect

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.

Natural Research Design - Continued

2. Follow-up Survey

All respondents completed a 5-minute follow-up survey to provide context around their observed behavior.

The Approach in Numbers

86

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

2,676

ads observed

87

18-54 year olds
Android owners who
watch YouTube monthly

277

ads observed

(166 skippable /111
non-skippable)

Total Sample

173

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

2,953

ads observed

Attention: definition of the metric

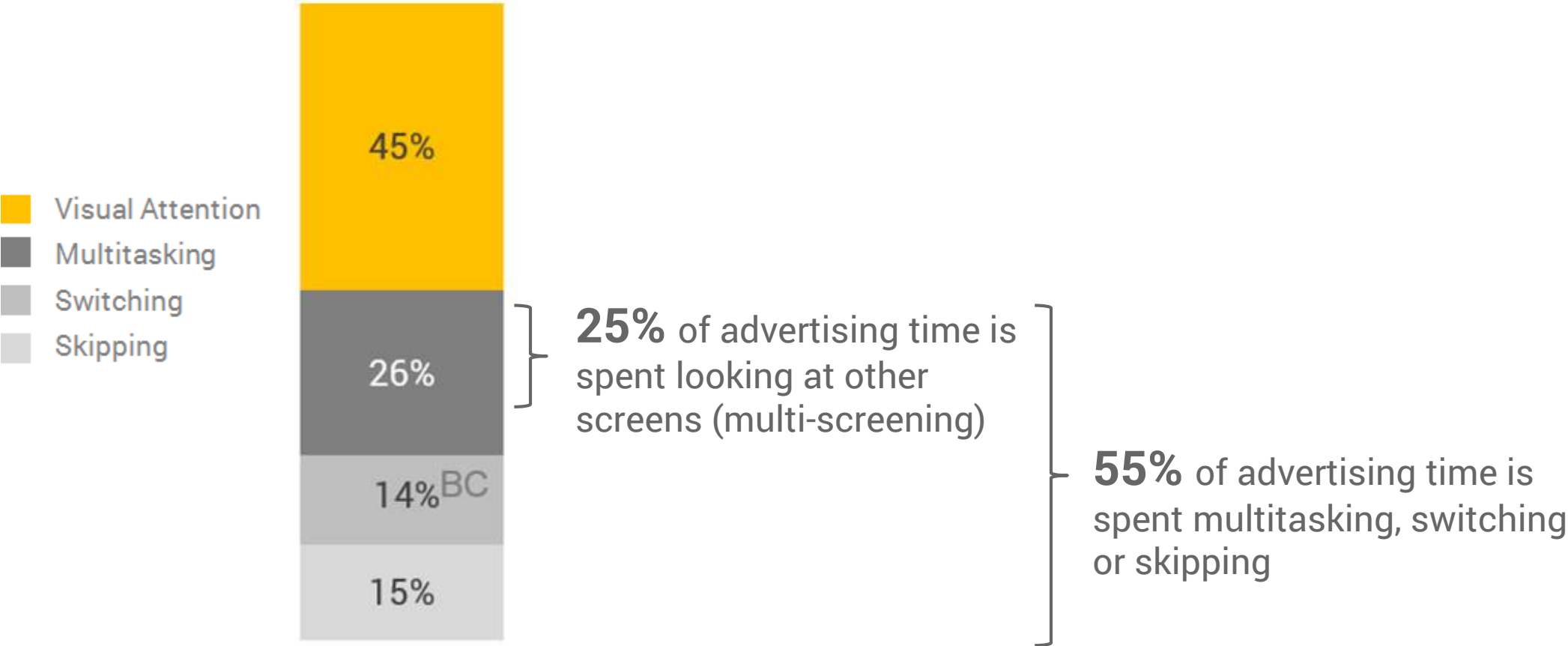| Visual Attention	Multitasking	Switching	Skipping
• Looking at the ad • Looking at another part of the screen, but the ad is visible • Looking at countdown / skip button	• Looking at other screens • Looking at people / other areas	• Changing Channels • Clicking on another video / link • Minimizing the ad • Closing the YouTube app	• 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

TV
Advertising Time

Visual Attention 45%

Multitasking 26%

Switching 14%BC

Skipping 15%

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

55% of advertising time is spent multitasking, switching or skipping

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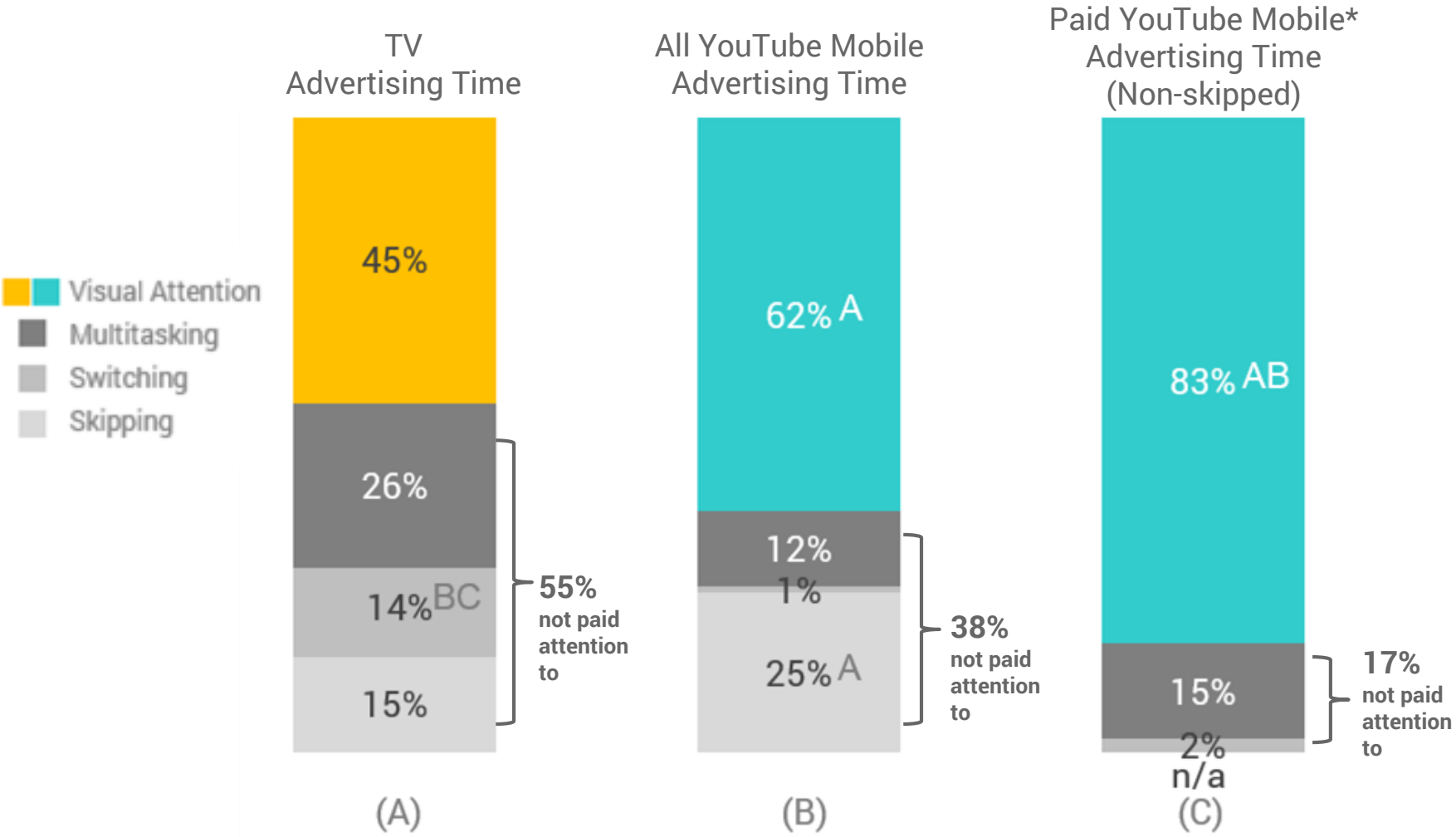
55% of TV advertising time is NOT paid attention to

Legend:
- 🟧🟦 Visual Attention
- ⬛ Multitasking
- ⬜ Switching
- ⬜ Skipping

TV Advertising Time
- 45% (Visual Attention)
- 26% (Multitasking)
- 14%BC (Switching)
- 15% (Skipping)
- 55% not paid attention to

(A)

All YouTube Mobile Advertising Time
- 62% A (Visual Attention)
- 12% (Multitasking)
- 1% (Switching)
- 25% A (Skipping)
- 38% not paid attention to

(B)

Paid YouTube Mobile* Advertising Time (Non-skipped)
- 83% AB (Visual Attention)
- 15% (Multitasking)
- 2% (Switching)
- n/a (Skipping)
- 17% not paid attention to

(C)

- *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

Mobile YouTube viewers do not multitask during ads to the degree that TV viewers do; TV viewers annoyed by amount of ads

Multitasking

TV
YouTube

Activities not related to ad viewing (NET)	Use another device	Do something else in the room	Leave the room	Fast forward/ skip the ad if possible	Change channel/flip to another window	Mute the ad
93% / 94%	66% / 6%	56% / 14%	55% / 2%	49% / 86%	41% / 6%	10% / 8%
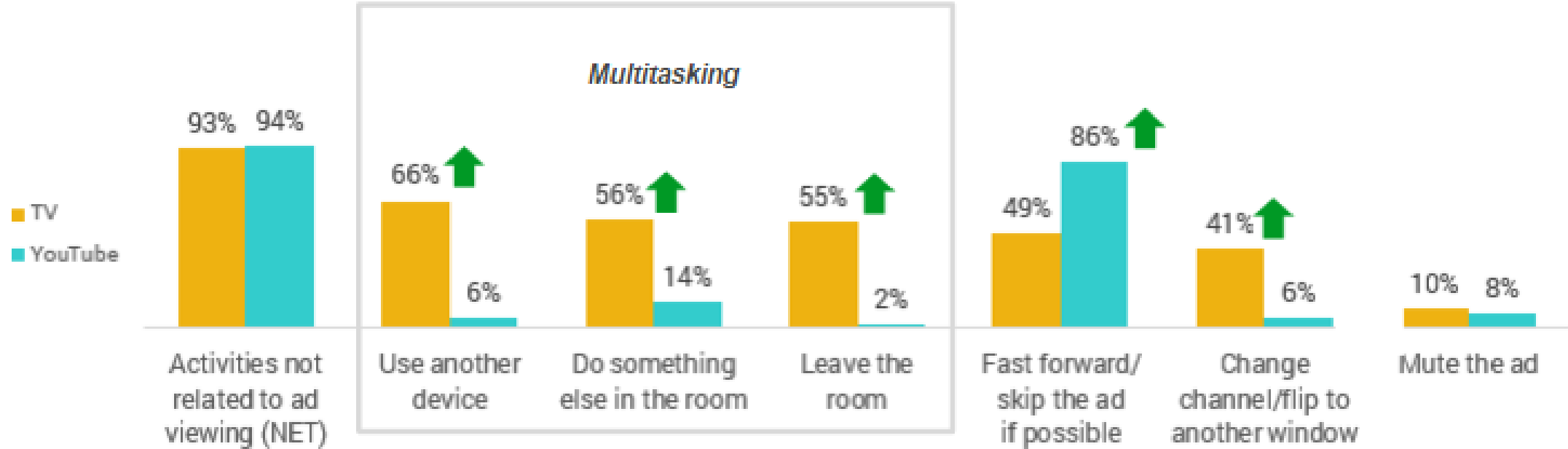
73% of **TV viewers** agree that the **amount of TV ads** during their favorite shows is **annoying**

⬆ Statistically higher at 95% c.I.

Brand Impact Controlled Experiment

Controlled Experiment Design

Total Respondents (n=1,572); 9 Ads Tested		
TrueView+TV **n=248**	**TV** **n=317**	**Control** **n=1,007**

Day 1 Exposure #1

6 of 20 YT videos, 3 after TrueView / 25 min TV content with 2 breaks with 4 ads each	25 min TV content with 2 breaks with 4 ads each	BRAND METRICS
Distraction questions on content	*Distraction questions on content*	Randomize: 50% desktop / 50% mobile

Day 2 Exposure #2

BRAND METRICS	BRAND METRICS	No Control Cell Exposure on Day 2
Randomize: 50% TV Day 1 / 50% YT Day 1		

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^

+38% +31% +27% +9% +71% +500%

Top of Mind Brand Awareness | Unaided Brand Awareness | Brand Awareness | Top of Mind Ad Recall | Unaided Ad Recall | Ad Recall | Purchase Intent | Consideration | Recommendation | Closeness

13
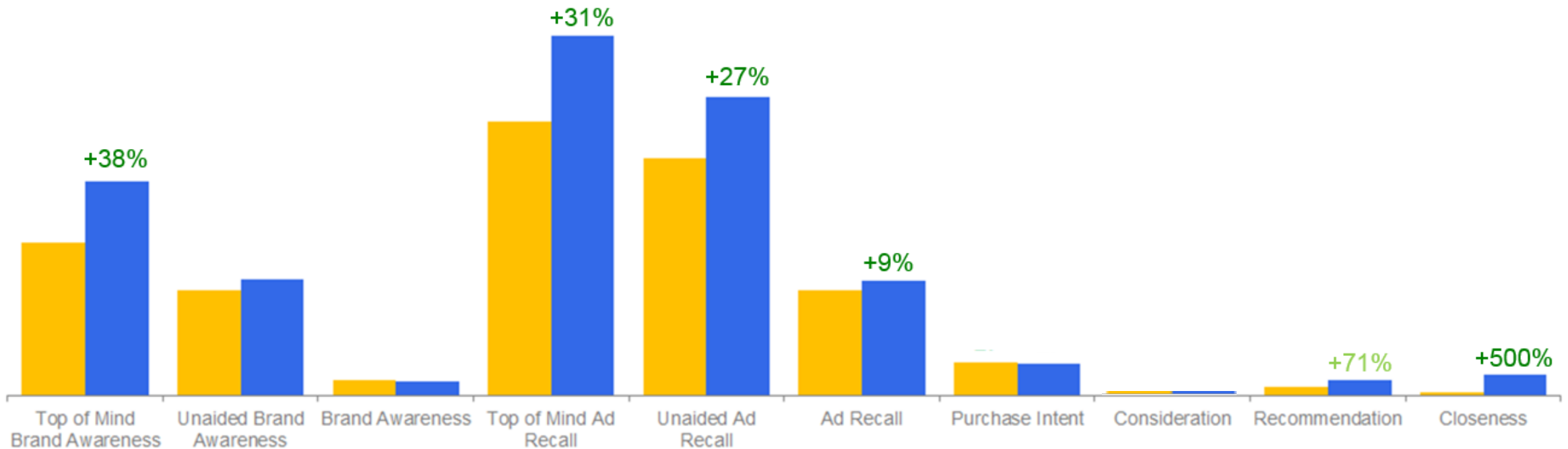
Appendix

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)>?