

LUMEN

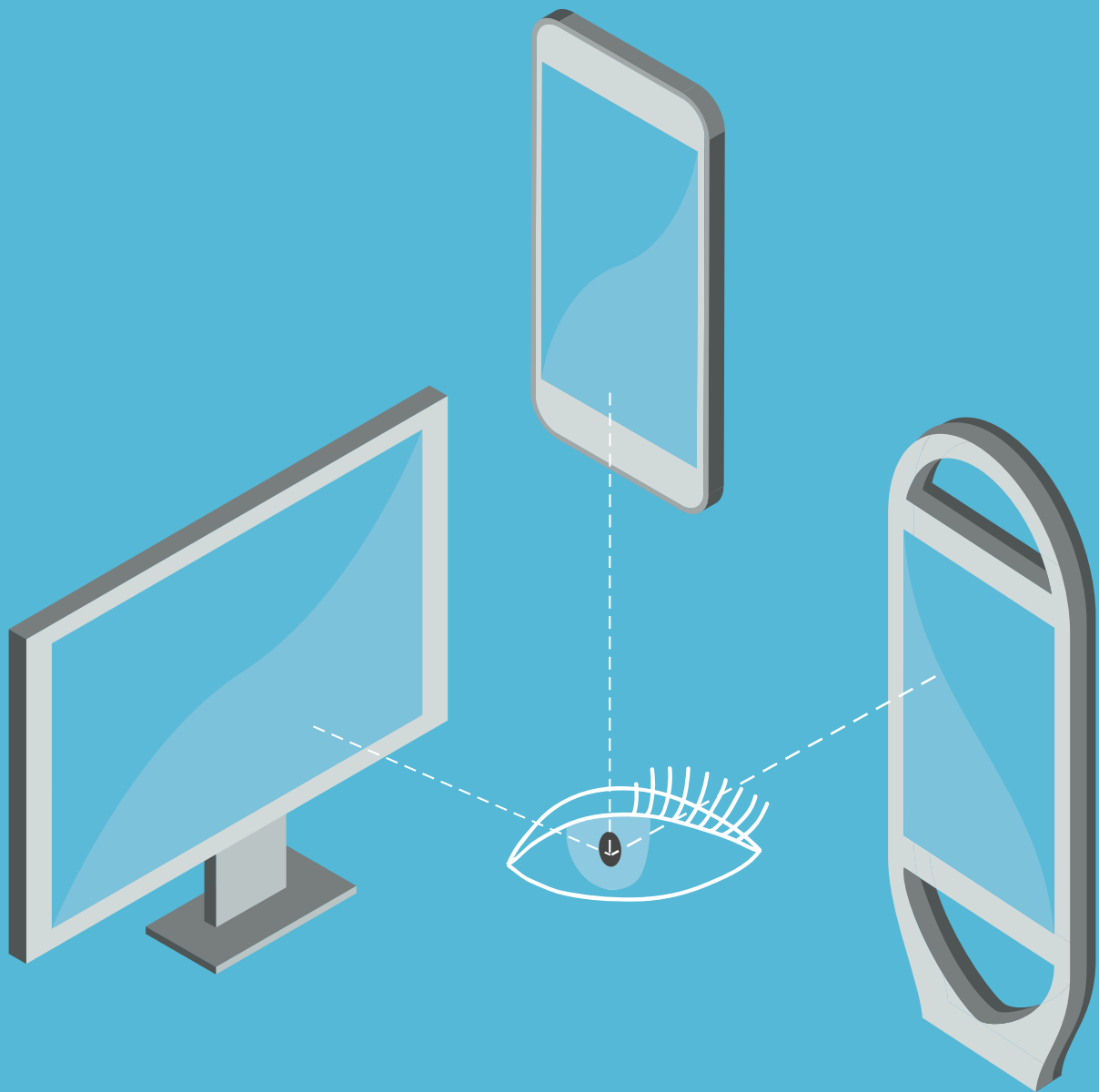
ATTENTION: THE COMMON CURRENCY FOR MEDIA

LUMEN RESEARCH WITH JCDECAUX

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USING EYE TRACKING TO UNDERSTAND THE REALITY OF ATTENTION TO ADVERTISING ACROSS MEDIA



METHODOLOGY

EYE TRACKING AT SCALE

ABOUT LUMEN RESEARCH

Lumen Research have been conducting large scale eye tracking projects in the UK for the past 5 years. In 2016, they set up the world's first digital eye tracking panel: a continuous passive research project, investigating how people engage with advertising when on their home desktop computers. In the past two years, they have collected data from 766 respondents, and over 250,000 in-context ad impressions (video and static), across thousands of sites.

DESKTOP DATA

The Lumen system recorded not only the ads that were viewable in accordance to the IAB standards, but crucially, whether these ads were actually seen. If the eye rested on an ad for more than 100ms, this was defined as a 'fixation', and the ad was deemed to have been 'viewed'. The clock then recorded how long respondents looked at the ad.

This meant that Lumen produced statistics not just on the percentage of ads that were viewed, but also the average dwell time these ads received. This data set provided a benchmark to influence OOH and Mobile advertising.

OOH DATA

OOH data was obtained from the AM4DOOH project. This joint research initiative produced by a consortium of JCDecaux, Clear Channel, APG and Exterior with the support from FEPE, judged the relative visual impact of Digital OOH (DOOH) versus static screens. 464 respondents were recruited in the summer of 2017 in the UK, France, Sweden and Switzerland and asked to view three hyper realistic 3D virtual

environments (during a road trip, at a train station and at a shopping centre) containing a variety of OOH panels. Their eyes were tracked with cameras similar to the ones used on the Lumen desktop panel, with the same definition of what counts as an eye fixation.

MOBILE DATA

The Mobile data was collected through lab experiments. 150 UK respondents were recruited in late 2017 and asked to browse the internet on their mobile phones while wearing specialist eye tracking glasses. 50 hours of data were collected, across 11 sites, 57 brands and 2,682 individual ad impressions. The IAB Viewability standards were applied to these sessions, as were the Lumen viewing standards.

CROSS-MEDIA ANALYSIS

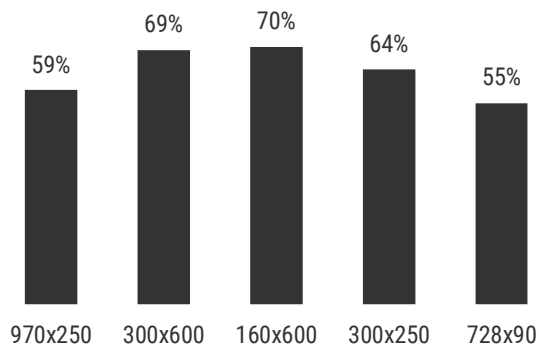
This research methodology allowed Lumen to apply the Visibility Adjusted Contacts (VAC) Viewability and viewing criteria across all media. We could evaluate different media using a common currency of attention. What did we learn?

¹ Fixation definition thresholds were examined in previous Route studies, and the chosen 100ms minimum fixation duration has been applied throughout this report to ensure comparability and consistency.

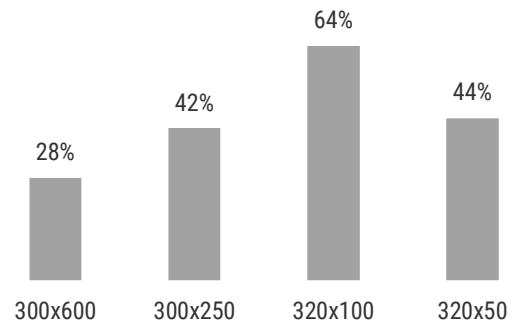
VIEWABILITY

THE FIRST CHALLENGE WAS TO UNDERSTAND HOW VIEWABILITY RATES DIFFERED BETWEEN MEDIA – AND WHETHER OUR EXPERIMENTAL DATA CONFORMED TO THE OTHER SOURCES OF VIEWABILITY DATA.

DESKTOP



MOBILE

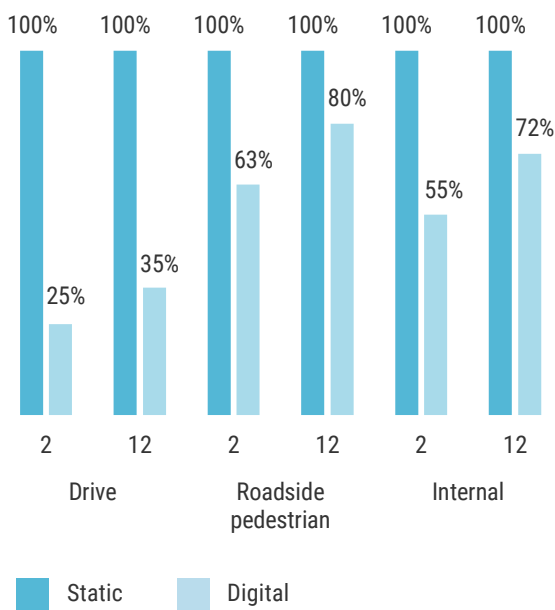


Applying a consistent Viewability definition across media is revealing. In the Lumen data, desktop Viewability was found to be around 64%, only slightly higher than the 61%, which Viewability specialists IAS reported for the UK over the same period.

Mobile Viewability in our experimental data was 43% – again, marginally higher but still very close to the UK mobile advertising data reported by IAS.

DOOH VIEWABILITY RATES FOR PEDESTRIANS ALMOST ALWAYS OUTPERFORM BOTH DESKTOP AND MOBILE.

OOH



For OOH, Viewability rates can be understood without recourse to experimental or tracking data. For static posters, audience measurement protocols ensure Viewability is 100%. Audiences are only counted if they are exposed to both sides of a poster and with obstruction affecting less than 10% of an ad.

For DOOH ads, the situation is slightly more complex because ads are typically on rotation, which means each ad may have a different audience. Fortunately, a relatively simple formula can be applied to calculate the Viewability of an ad in a digital OOH site. This factors in the length of the ad, the number of ads on rotation, and duration of audiences passing.

$$\min \left(\frac{\text{Passage duration} + \text{Ad duration} - 2}{\text{Loop duration}}, 100\% \right)$$

Although there is variation between markets in ad durations and the number of ads in the loop, typically digital panels loop through six 10 second ads.

Applying this convention in the above formula, along with typical passage durations, gives the DOOH Viewability rates in the chart above.

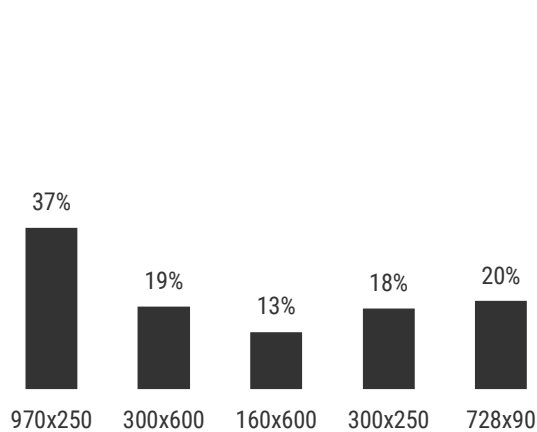
Pedestrians pass OOH panels quite slowly and so usually can see most of the ads on loop. Drivers naturally move faster and may only be exposed to one or two of the six ads on rotation. As a result, Viewability rates tend to be lower for drivers than most other audiences. For both pedestrians and drivers, larger digital poster ads get higher Viewability rates, as they have longer visibility distances (as confirmed in previous Route studies).

Overall, OOH often has higher rates of viewability than desktop and mobile, but not always.

REALISTIC LIKELIHOOD TO SEE

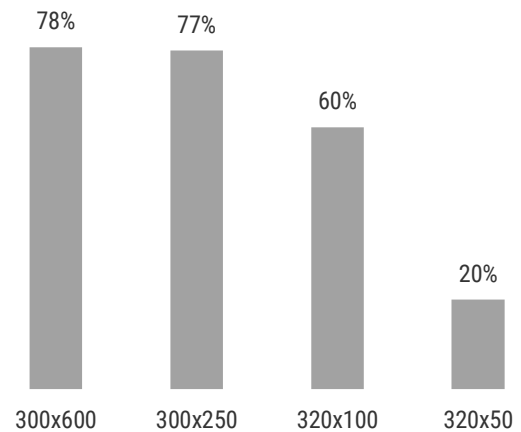
THE SECOND CHALLENGE WAS TO USE THE EYE TRACKING DATA TO UNDERSTAND THE REALISTIC LIKELIHOOD TO SEE A VIEWABLE AD IN EACH MEDIA.

DESKTOP



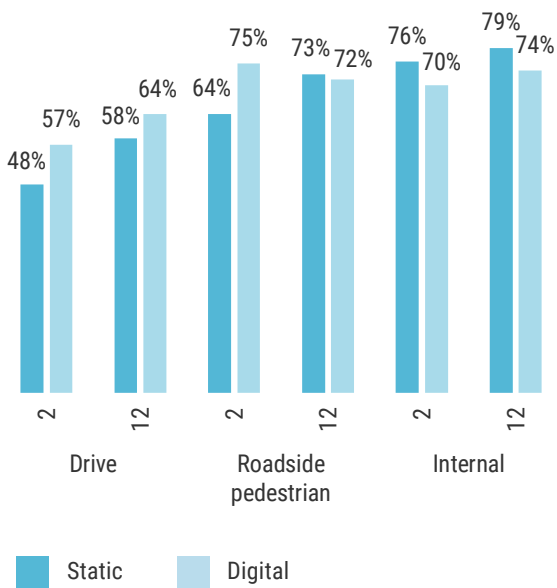
This analysis revealed big differences in the attention given to viewable advertising between desktop, mobile and OOH. On desktop, if an ad is served in a viewable position, consumers have a 22% chance of noticing the ad – meaning that they had at least one eye fixation on the ad. There are big differences between ad formats: larger ads (970 pixels x 250 pixels) are much more likely to be noticed than smaller formats, such as MPUs (300x250).

MOBILE



Following the same approach for mobile, we see even wider differences between formats. Larger format ads, such as DMPUs (300x600) take up almost the whole of the screen, and are far more likely to get noticed than the smaller and more ubiquitous 320x50 formats.

OOH



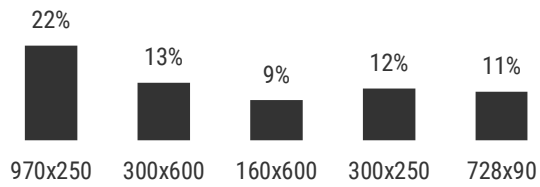
This approach makes Mobile and OOH advertising look considerably better than desktop display advertising. The size and salience of OOH, and quasi-sequential nature of some mobile advertising mean that viewable advertising in both these media are more likely to gain attention than desktop display.

For OOH, again there are differences between formats and panel types. Viewable digital panels are more likely to get noticed than their static counterparts, especially in faster moving environments. Larger panels are more likely to get noticed than smaller frames.

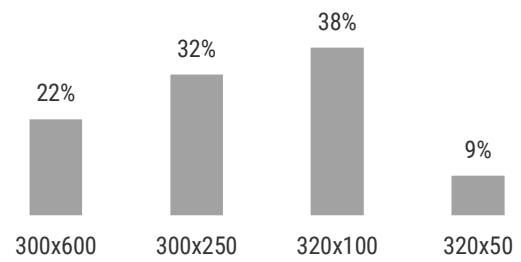
VISIBILITY ADJUSTED CONTACTS

THE THIRD CHALLENGE IS TO APPLY THE VAC CRITERIA ACROSS ALL MEDIA:
THE PERCENTAGE OF ALL ADS SERVED THAT ARE ACTUALLY SEEN.

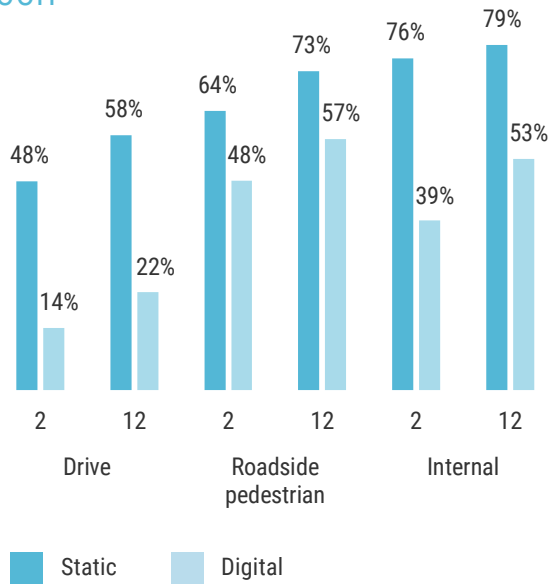
DESKTOP



MOBILE



OOH



When both Viewability And Likelihood to See metrics are combined, a different picture emerges. According to this overall statistic, OOH almost always beats mobile and desktop.

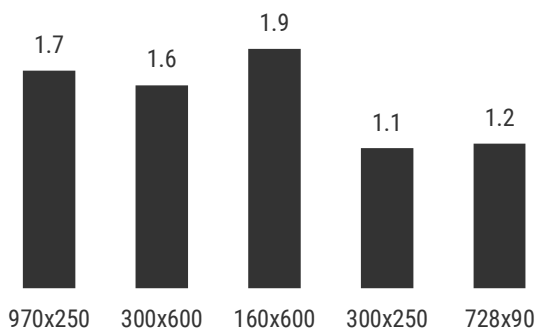
ONLY OOH MANAGES TO ACHIEVE HEALTHY LEVELS OF BOTH VIEWABILITY AND VIEWS.

As we have seen, desktop tends to have quite good Viewability rates, but those viewable ads are often ignored. Meanwhile, mobile is the other way around; once viewable, mobile ads are quite good at being seen, but they are limited in their impact by relatively poor Viewability.

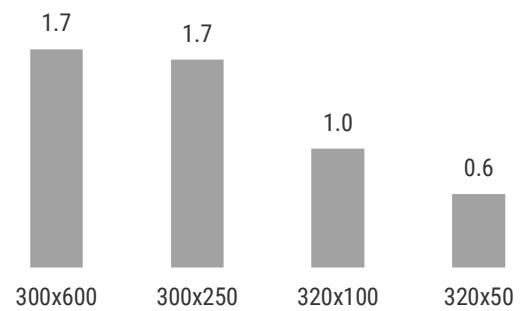
DWELL TIME

MOST ADVERTISERS WOULD BE DISAPPOINTED IF THEIR ADVERTISING ONLY RECEIVED A SINGLE EYE FIXATION SO IT WAS IMPORTANT TO IDENTIFY THE AVERAGE DWELL TIME WITH ADS ACROSS DIFFERENT MEDIA.

DESKTOP



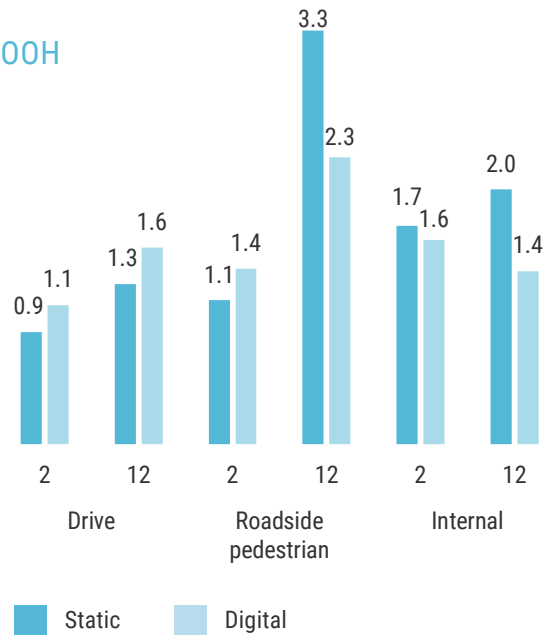
MOBILE



Here, the surprising thing is not the difference but the consistency across media; average dwell times of different media and formats are almost always somewhere between 1 and 2 seconds. Once again there are significant differences across different formats – with larger formats receiving more attention across all channels.

Interestingly, dwell times for ooh are often higher than desktop and mobile, especially for pedestrians and larger formats.

OOH



SHORT AND LONG ATTENTION MEDIA

INTERESTINGLY, ALTHOUGH OOH IS OFTEN REGARDED AS THE MEDIUM WITH THE SHORTEST ATTENTION SPAN, IT APPEARS THAT DWELL TIME IS SIMILAR ACROSS THE BOARD, WITH OOH ACTUALLY GETTING THE LONGEST TIME OF THE THREE MEDIA.

However, we should not exaggerate these findings. The key point to take away is this: OOH is indeed a 'short attention' medium, but so are mobile and desktop display. And much can be achieved in a short amount of time. Data from Lumen and others suggests that 2 seconds attention is plenty of time to deliver powerful brand messaging and build brand recall.

The dwell time findings have important implications for the kind of messages advertisers should deploy in these channels, and the type of creative they should use.

Perhaps when developing digital advertising, creative agencies should 'think like a poster'? We would be happy to help deploy decades of creative best practice from the world of OOH to what used to be called 'new media'.

THE REAL LEARNING IS THAT MOBILE AND DESKTOP DISPLAY ARE 'SHORT ATTENTION' MEDIA TOO.

THE FUTURE IS A COMMON CURRENCY OF ATTENTION

Agencies have long held OOH advertising to a higher standard than other media; OOH ads not only have to be viewable, they must be viewed to count as a contact. This is a rigorous standard, but a necessary one.

YOUR ADVERTISING CANNOT WORK UNLESS YOUR TARGET AUDIENCE LOOKS AT IT.

The media industry is now in a position to apply the same rigorous standards of measurement to other media. Scalable, low cost eye tracking

of the type pioneered by Lumen allows media buyers to go beyond measuring what people could see to calculate what people actually see, across a wide variety of media. The results offer a possibility to establish a common currency of attention; a stable and consistent yardstick with which to measure all media. Agencies often say that they are interested in 'buying eyeballs'. Up until now, Opportunity to See has been the proxy metric for this goal. However, with eye tracking we are now able to look beyond potentialities, and focus on what really matters – Attention.

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