MDI ALERT

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THE REALITIES OF ATTENTIVENESS

The subject of commercial or ad attentiveness is nothing new. As far back as the early-1960s BBDO developed the concept of ad exposure—meaning attentiveness—as a key element of the agency's ill-fated computerized media "selection" model. There wasn't as much information as we now have, but there was enough to allow reasonable estimates to be made for TV, radio and print media. The agency's media researchers even went to the trouble of measuring outdoor billboards, using cameras situated behind the signs, facing oncoming vehicle traffic to determine what percent of the drivers and passengers were looking at the billboards. In the case of print media, the primary information sources were page traffic, or opening studies, plus ad recall research. As for radio, it was able to provide some ad recall data as well.

TV, however, had the most information with a number of early observational studies using cameras and teen or college students who spied on their parents while they watched TV. There were also dial switching tallies by Nielsen and a huge number of commercial recall studies. Sadly, most advertisers preferred to dictate their media mixes arbitrarily rather than evaluating realistic alternatives and considering attentiveness, so for the next 50-60 years questions about exactly what the TV rating services were measuring and reporting faded into the background, and everyone seemed content to accept "average commercial minute audiences" for national TV buys as a valid currency, without considering what the data actually meant. What Nielsen was saying was that an average program viewer "watched" about 95% of the content that appeared on the TV screen. In other words, practically no one left the room, even when commercial breaks appeared, and just about every viewer was "watching" the commercials.

To be fair, it was never intended that the TV rating surveys, originally conducted by Nielsen or other companies using either telephone coincidentals or diaries, would be able to measure viewing on a minute-by-minute basis, let alone second-by-second. It was because the meters could track set usage in this manner that it was assumed—and accepted by almost everyone—they were reflecting the viewing experience. After all, meters are so precise, aren't they?

All of this has recently changed thanks to the initiative of TVision in the U.S. and companies such as Lumen in the UK and Adelaide in Australia. These companies have been using upgraded technologies to determine whether a person who is assumed to be viewing a TV show is present at any specific moment while it is in progress and whether the program viewer is looking at the screen, with similar research being conducted for online users who visit particular websites. What has been found should not be surprising, but it seems to have come as a shock to many. Yes, it's true that people often leave the room while a program is playing on their TV screen, but this form of avoidance or lack of interest is far greater during commercials. Moreover, while about 30-35% of the audience is absent during an average commercial (or in the process of leaving), about half of those who remain are engaged in fully or partially distracting activities. This means that only 35% or so of those who were in the room just before a break interrupted the program watched an average commercial for at least two seconds, a far cry from the 95% that many have believed to be the case.

The TVision findings reveal that, except for very unusual program content like The Super Bowl, there is not a great range between programs. In fact, the majority of the commercial attentiveness findings fall in a fifteen-point range, with low scoring shows averaging 30-35%, high scorers averaging 44-47% and most falling in between these extremes. The types of high and low scorers also match results based on program attentiveness studies that have long been conducted by Simmons, MRI and others. Typically, a serious drama will attract above average commercial attentiveness levels as program viewers become highly engaged and are reluctant to absent themselves for fear of missing the return of program content when the break ends. So, it's not unusual for a drama series to average commercial attentiveness rates of 44-45%. In contrast, sitcoms, especially animated ones, talking head shows and some reality types, are often less engaging, and they tend to fall in the 34-37% attentiveness range. We also know that younger audiences are more likely to absent themselves than older viewers, and we suspect that overly cluttered commercial breaks have a negative effect on ad attentiveness but TVision has yet to confirm that.

Despite the fairly narrow range between the highs and lows, we remain big supporters of adding viewer attentiveness to TV rating surveys, because, for the first time, this would allow media planners and advertisers to understand that the reach and frequency stats they have long been using have presented a vastly inflated picture of what was actually happening when consumers were "exposed" to their commercials. In addition, there is much to be gleaned from commercial attentiveness data about how the messages are being received by those who watch them. For example, what kind of viewer is being attracted, how much time is spent with the commercials, what elements in the execution keep them attentive or have the opposite effect, and are specific commercials being overexposed and wearing out their welcome? Similar data for program content should also be extremely valuable to those who cast and create content and the networks who license such fare, so there is much to commend the inclusion of attentiveness metrics in upcoming national TV audience surveys, especially regarding streaming.

Unfortunately, the primary thrust of the attentiveness proponents has been on media buying, in particular for national TV. We feel that this is a mistake for some very good reasons.

Just to demonstrate how the math works, let’s take the example of a TV network with 30 shows 10 of which average a 44% attentiveness, 10 average 38% and the last 10 shows get only 33% of their viewers to watch an average commercial. If a buy was dispersed evenly across these programs, its average ad attentiveness would be 38.3%. But what if the buyer was somehow able to force the seller to grant 50% of the exposures in the high scoring third of its shows, instead of the normal third? Overall, the average commercial attentiveness would rise from 38.3% to 39.8%, a gain of 3.9%.

But say the seller imposes a 25% premium for shifting the placements to its ten high attentive shows. The overall CPM hike would amount to 3.8%, making the trade-off between the media cost and the attentiveness gain just about a draw. You aren't getting a lot more attentive eyeballs per dollar. In media buying there are always two players—the buyer and the seller—and the latter controls both the pricing, or CPM of the audience, and how the ads are placed. If commercial attentiveness was built into the new national TV rating service(s), the media sellers would be the primary funders and they would have the same data as the buyers. So, if the buyers all began to clamor for more of their messages to be placed in shows—mainly dramas—where attentiveness was somewhat higher than the norm, the sellers would be in a quandary. How does the seller accommodate the buyers if they all want time only in the best performing programs? Obviously, this is impossible, so the seller will continue bundling the good, bad and the ugly together in seemingly discounted packages, forcing the buyers to run ads in most or all of its shows. This means that there will be no change in the average attentiveness levels for most buys. Or, if a very huge upfront buy is going down and the seller caves slightly and grants the buyer a larger share of top attentiveness placements, it's highly likely that the seller will also impose a CPM premium for the choice spots, which may be larger than the attentiveness point or two that might be gained in the overall schedule attentiveness stats. In other words, the buyer might gain 3-5% in visually attentive eyeball "impressions," but have to pay 10-15% more to get it. Is that a worthwhile trade-off? For some, the answer might be yes, but others may disagree.

Sadly, we do not see viewer attentiveness becoming a basic part of TV's national rating services in the near future, as the sellers will remain the main funders, paying up to 80% of the cost. They are not going to support any service that shows that only 35% of their viewers "watch" an average commercial. If advertisers and program producers understood what vast amounts of helpful data such a service could yield them, over and above the narrow time-buying function, this might change. But as yet, we see no sign of advertiser CMOs being willing to step in and devote the time or the dollars that are needed to have a real say about the specs for a truly improved national TV rating service. The same can be said for the program producers. So what we will can expect is more of the same, with relatively small panels supplying viewer-per-set factors that will be projected to set usage information provided by huge ACR and set-top box home panels. While the "big data" panels, findings will be statistically more stable for low-rated programs and individual installments of same, they will still paint a very inflated picture of viewing, especially for commercials.