

# Cinema in the Media Mix: Benchmarking Attention to Cinema Ads vs All Other Media



# An Introduction to Attention

The media buying marketplace seeks common measurement to support fairness in dealings, transparency in valuation, and efficiency in process. For the multi-billion-dollar premium video advertising business, the common measurement has been predominately based upon one metric: “exposure” to ads, also known as “opportunity to see.”

Despite dramatic changes in content distribution, media platforms, technology, and consumer behavior, the exposure metric that led to the first Nielsen measurement box in 1950 has persisted. And while so much of the discussion over past years has been about how to better measure exposure, a fundamental question has not been answered: **What should we be measuring, considering today’s complex media landscape?**

We now know that different media platforms have the potential to yield varying degrees of advertising effectiveness. But without a consistent, objective way to compare the quality of those ad exposures, the video industry will remain stuck as it relates to marketplace intelligence.

## Enter Attention Metrics.

Growing in appeal among marketers, brands, and agencies as a means of leveling the playing field across media – ‘attention’ is quickly developing into the video ad industry’s unifying metric of efficiency and efficacy.

This important revolution in media measurement is due to studies that show a statistically significant predictive value between attention scores and the advertising’s ultimate performance. These **higher attention scores can directly correlate to increased sales lift, foot traffic, and app downloads, among other campaign objectives.**

Marketers searching for a young, diverse audience are challenged by cord-cutting and ad-skipping. Cinema is the one medium left that is fully opt-in and on-demand where consumers are riveted throughout the entire experience, ads included. When moviegoers arrive at the theater and settle into their seats, one might assume people are snacking on popcorn, checking their phones, or talking to friends. Surprisingly, they’re leaned into the experience and watching the on-screen ads.



**We know that attention metrics can increase media effectiveness of plans and are eager for broader adoption across the industry. With a proven, captive, and attentive audience in seats, we can leverage the attention data we have to understand how to incorporate cinema as part of an overall channel mix.**

**Joanne Leong**

**VP Global Partnerships & Planning**





# Putting Cinema Into The Media Mix

As the media landscape continues to fragment, and the pressures for brand ROIs increase, it becomes increasingly important for advertisers to incorporate attention metrics into their media planning and buying process. Attention metrics provide valuable insights into which channels and platforms are most effective in capturing and holding audience attention, enabling advertisers to optimize their media plans and improve the ROI of their advertising campaigns. Looking at CPMs through the cost-per-view lens (:05 or more) as a proxy for attention, unsurprisingly cinema becomes the most efficient video platform in any media mix.

Overall, **leveraging attention metrics to optimize media plans allows advertisers to make data-driven decisions that maximize the impact of their advertising and improve ROI.** It encourages a shift away from traditional metrics, such as exposure and impressions, towards more meaningful and relevant metrics that take into account the importance of capturing and holding consumer attention in today's media landscape.



**Attention scores are the currency of success in today's media mix. In a world where consumers are constantly bombarded with messages, the ability to capture and hold attention is paramount for any brand's success. By focusing on attention scores, brand planners can ensure their messaging is not only seen but also heard, remembered, and acted upon.**

**Manu Singh**

**SVP, Insights/Analytics & Data Sales Strategy**



# Executive Summary

## Benchmarking Attention to Cinema Ads vs All Other Media

In the first US cinema-based study on attention, movie theater ads were measured against all other video platforms, using eye tracking to reveal exactly where and how long moviegoers were looking at the screen. **The study's major finding showed that cinema ads deliver four to seven times the attention metrics compared to Linear TV, CTV, social, and digital.**

The study was conducted by research technology leader Lumen, commissioned by National CineMedia (NCM), the largest cinema advertising network in the US, and carried out in collaboration with dentsu's Attention Economy Initiative on outcome metrics.

This breakthrough study used Lumen's proprietary eye-tracking technology to create an attention score for cinema and provide brands with a better understanding of how much attention cinema ads generate relative to other media, providing an apples-to-apples comparison.

Twelve brands across retail, automotive, apparel, CPG, QSR, telecom, entertainment, and pharma participated in the study.

During the same attention study, respondents participated in a survey measuring brand recall and choice that **proved a one-to-one relationship between attention metrics and brand recall and choice.**

In other words, **there is a clear and statistically significant correlation between attention levels of an ad across media platforms with the ultimate performance of the advertising.** Additionally, leveraging attention metrics such as cost-per-seconds viewed into the media planning and buying decision-making process helps advertisers navigate the increasingly complex media landscape and achieve better ROI for their advertising spend.

## Key Findings

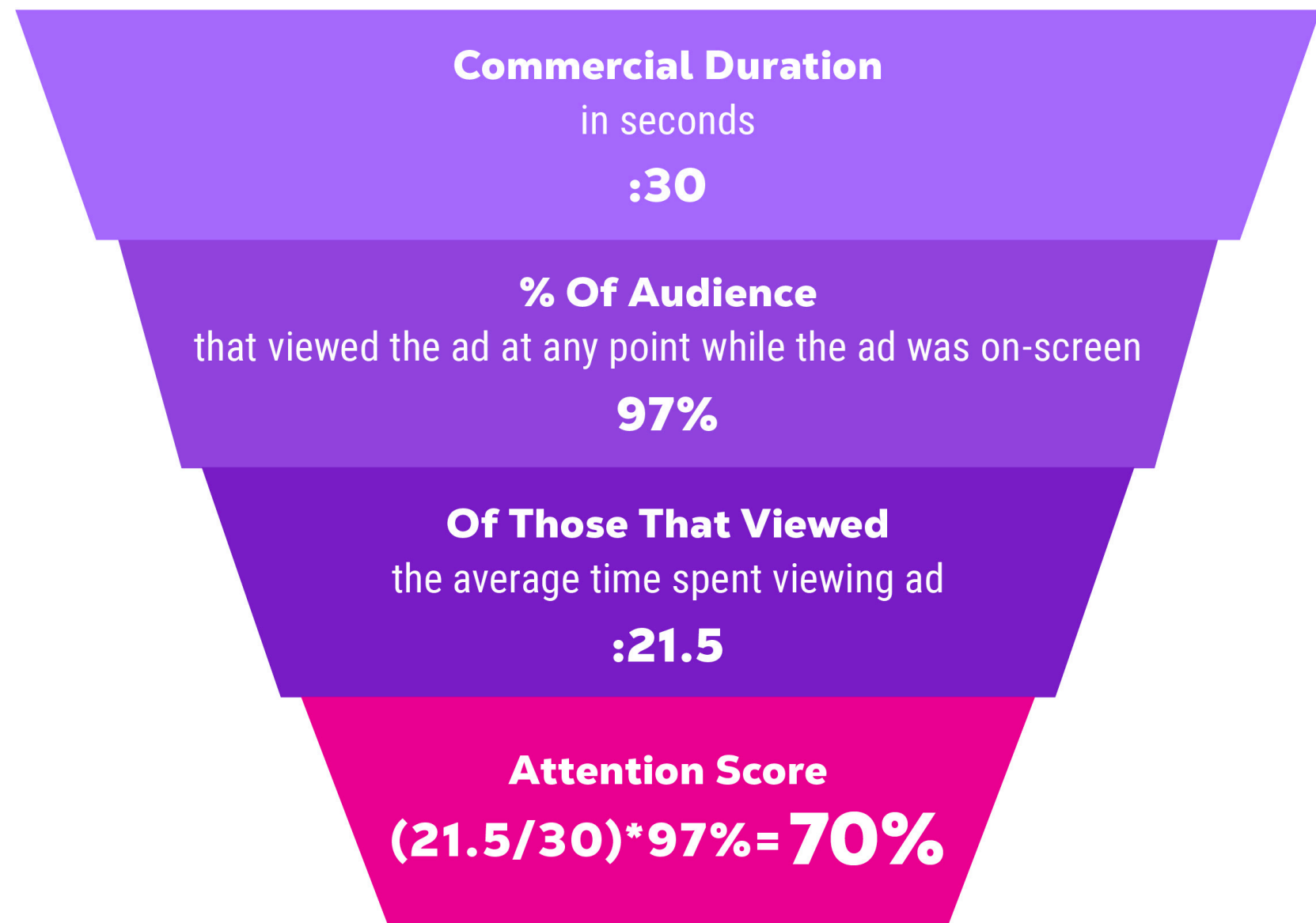
- 1 Cinema's attention scores are 4x-7x greater than all other video channels.**
- 2 A higher percentage of consumers watch ads playing in a movie theater compared to Linear TV and CTV.**
- 3 Consumers watch ads at movie theaters longer than other video platforms.**
- 4 Higher cinema attention scores directly correlate with high ad recall and brand choice.**





# The Formula for Calculating Attention Score

The attention funnel maps out the 'attention flow' from top to bottom; from what consumers can see (duration of the ad unit), to the % of consumers that look at the ad (% viewed) and most importantly, how long do they view the ad.



# Key Finding

# #1

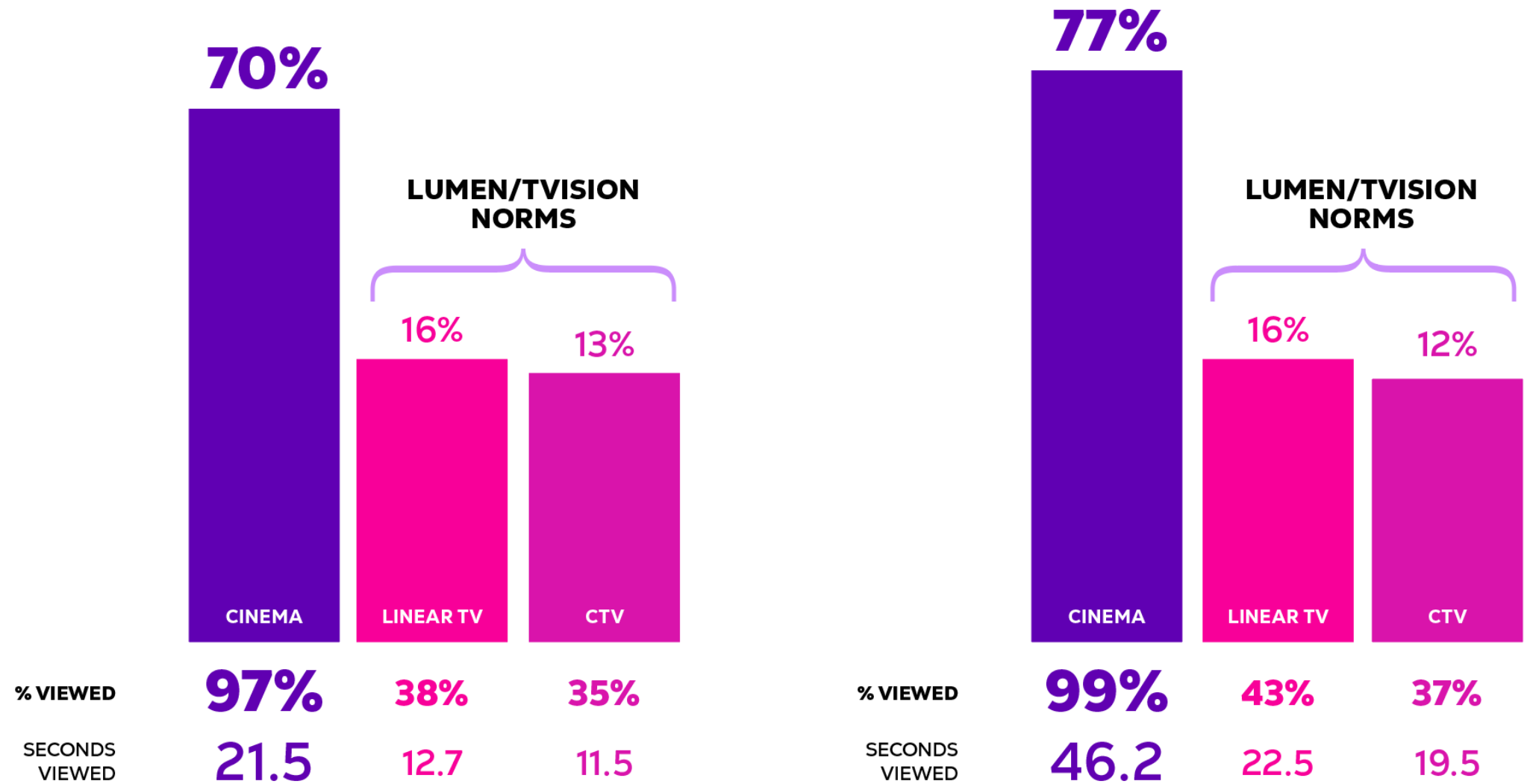
Cinema's attention scores are 4x-6x greater than Linear TV & CTV.

## :30 Ad Attention Score

Cinema's attention scores are 4x greater than Linear TV and 5x CTV.

## :60 Ad Attention Score

Cinema's attention scores are 5x Linear TV and 6x CTV.





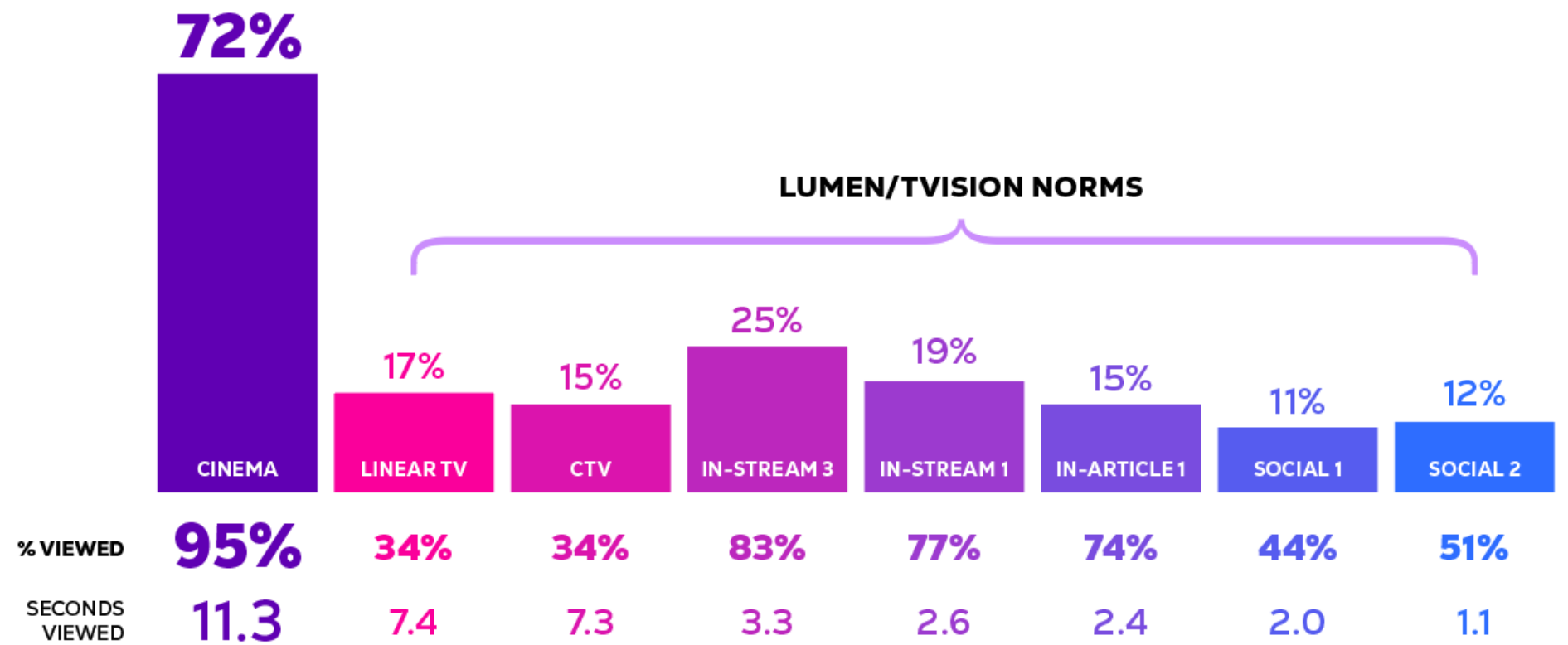
# Key Finding

# #1

Cinema's attention scores are 4x-7x greater than all video platforms.

## :15 Ad Attention Score

Cinema has the most engaging ad environment compared to social, digital, Linear TV and CTV.



## Key Finding

# #2

A significantly higher percentage of the movie audience watches ads on the big screen than the audiences of Linear TV and CTV.

## % Of Audience Viewed

2x-3x more consumers watched ads playing in a movie theater than on Linear TV and CTV.



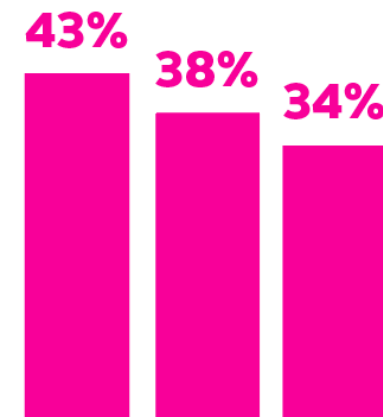
### CINEMA



AD LENGTH :60 :30 :15



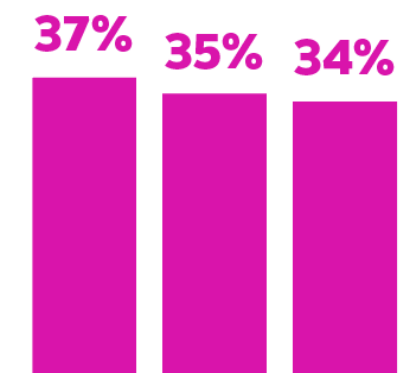
### LINEAR TV



:60 :30 :15



### CTV



:60 :30 :15



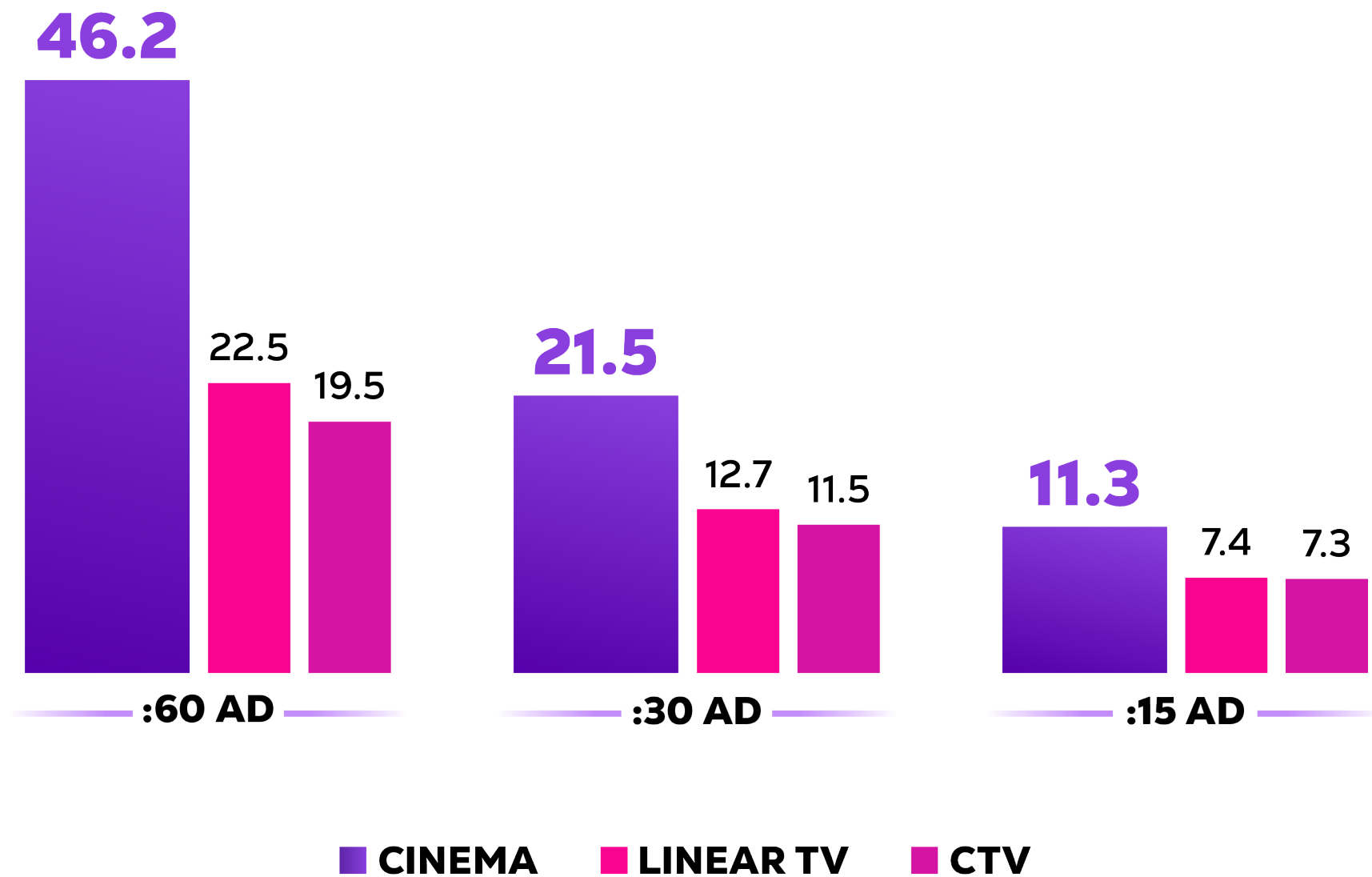
## Key Finding

# #3

Consumers watch cinema ads for a longer duration compared to Linear TV and CTV.

## Seconds Viewed/Paid Attention To

Viewing ads on the big screen holds consumers' attention longer than Linear TV and CTV.



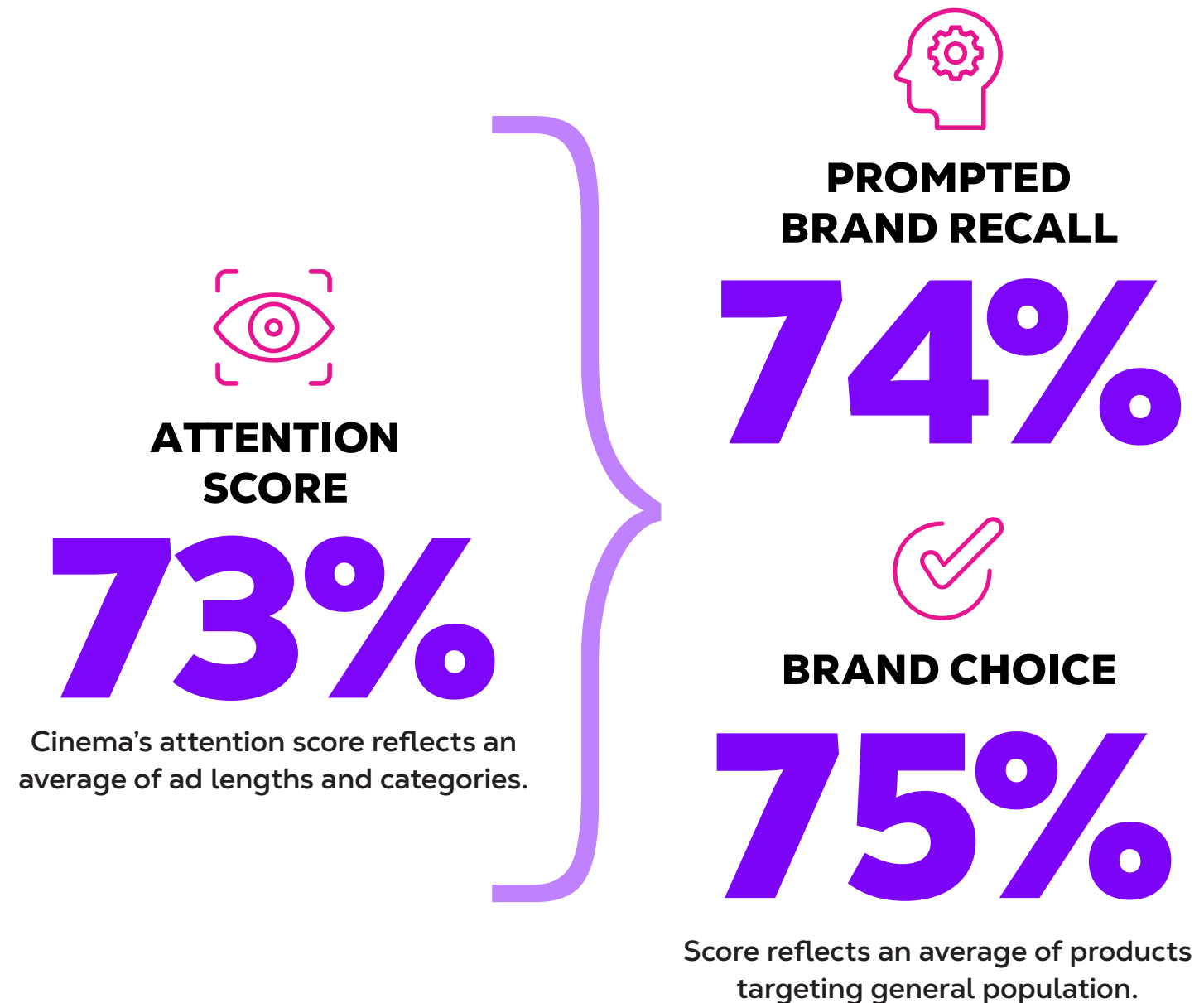
## Key Finding

# #4

There is direct correlation between Cinema “attention” scores and ad recall and brand choice.

## Greater Attention = Stronger Brand Outcome

In cinema, for every point increase in the percentage of the attention score, there is a 1% corresponding lift in brand recall and brand choice.







## Capturing Attention: Why It Matters To Brands

The opportunities 'attention' as a metric affords the media marketplace will likely be a game changer in the decision-making process.

NCM's cinema attention metrics enable global agencies and media buyers to determine the value of attention – as they combine it with the cost and recall scores – to compare it to other channels and platforms in their databases.

By including cinema in any media buy, advertisers will receive not only vital incremental reach but also proven ad performance and effectiveness.

**Brands and agencies can now confidently invest in cinema knowing the one-to-one correlation between high attention metrics and performance of that ad.**





# Study Methodology

## METHODOLOGY

Moviegoers were recruited to participate in the study and watch a showing of “Black Panther: Wakanda Forever” at a movie theater in Los Angeles. Participants agreed to be filmed during their normal moviegoing experience, they had snacks, access to their phones, could get up as needed, etc. The audience was exposed to a pre-show ad reel consisting of a mix of brands. During six screenings over two days, infrared cameras recorded respondents and measured whether they were paying attention to the screen. Cameras could detect second-by-second pupil body movements in the dark.

## PLATFORM NORMS

### Linear & CTV Norms:

TVision Data (Jan-Dec 2022 n=5,000 Homes)

### Digital Norms:

Attention Economy figures based on US Lumen Mobile Passive Panel Data (2021, Impressions = 3,775)





# Thank You

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