

NCM + LUIGEN

SPECIAL REPORT

Attention 2.0: Benchmarking Cinema Ad Attention



Introduction

The media buying marketplace has transacted on proxy metrics for too long. Reach and impressions are approximations, yet they are the currency for billions of dollars in video ad buys each year. As media consumers ourselves, we know that exposure is not even close to the whole story of ad engagement and effectiveness.

So, what is the alternative? **Attention is the metric media planners and buyers should be prioritizing when making their media buying decisions.** It is the gateway to key business outcomes; without consumer attention to an ad, there is no brand awareness, consideration or action taken. Attention metrics offer parity in a diverse, multiplatform media mix.

In 2022, National CineMedia (NCM), the largest cinema advertising platform in the U.S., commissioned Lumen, the leading attention research technology company, to conduct the first U.S. cinema-based attention study. Attention to movie theater ads were measured using eye tracking technology to reveal exactly where and how long moviegoers were looking at the screen. Leveraging Lumen's proprietary eye-tracking technology, the Attention 1.0 study established cinema

as the #1 attention-grabbing platform compared to other video outlets.

In 2023, NCM and Lumen partnered on a second cinema attention research study. In its second iteration, the study reinforces cinema's strength as the most engaging of all media platforms when it comes to consumer attention to ads. Cinema Ranks #1 again, surpassing premium video platforms such as FAST Networks, Premium AVOD, Digital Premium Video, and even Linear Live Sports. Due to its incomparably captivating environment and self-selected content, cinema draws the most attentive audiences of any video platform or channel.

Measuring Attention

Why is attention so relevant? The proliferation of screens and channels has further diffused a shrinking commodity: consumer attention. Without the eyes on the screen, any screen in which advertisers place their dollars, consumers are not aware of a brand and its messaging/offering. With large investments across media channels, it is critical that media buyers understand which platforms are commanding consumer attention.



We always hypothesized that cinema ads garnered increased attention given the nature of the leaned-in and distraction-free experience, so it was assuring that the numbers told that same story. By aligning United Airlines with relevant blockbuster moments with NCM, we're able to increase the reach of our marketing in a timely, culturally-relevant way.

Maggie Schmerin

Chief Advertising Officer, United Airlines

Cinema Attention Study 2.0

Employing the same methodology as the first attention study, Lumen used infrared cameras to detect pupil and body movements in the dark to determine whether the audience was looking at the movie screen or not, on a second-by-second basis.

The second investigation into cinema attention, conducted in October 2023, included two markets and twice as many showings as the previous study. The study measured attention to ads across 14 advertiser categories with a wider variety of ad lengths and compared results to an expanded list of media channels and platforms. Furthermore, Attention 2.0 included two independent films compared to the single, tentpole film studied in 2022.



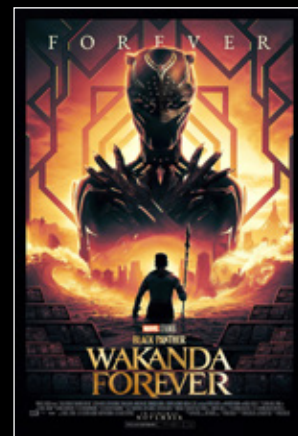
Executive Summary

When it comes to capturing viewers' attention, not all platforms are created equal. The proliferation of screens and channels has further diffused this shrinking commodity. Now measurable and actionable, attention is the unifying metric across video platforms that enables brands and agencies to build a highly effective media mix.

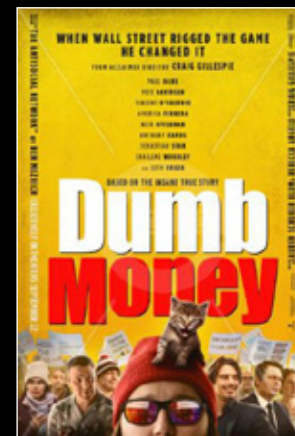
The first US cinema study exposed massive gaps in attention across today's popular video platforms. Cinema proved to be the attention-grabbing platform, regardless of ad length and placement.

With a larger, more representative sample, Attention 2.0 reinforced the previous year's findings: cinema ranks #1 in attention. The big screen consistently holds the attention of 97%+ of audience members, and not just for major blockbusters. Title takes a back seat as attention proves consistent across blockbusters like "Wakanda Forever" and smaller gems like "The Creator" or "Dumb Money." These results reaffirm that the moviegoing experience remains a lean-forward, self-selected engagement, regardless of a film's scale.

Contextualized against a broader competitive set that includes Live Sports, FAST networks, and premium AVOD, cinema is king. Even when examined over a wider variety of ad lengths and categories, the big screen commands higher engagement than other popular channels. Cinema's dominance holds whether ads are placed in a custom or live pre-show, and across key demographics.



2022 Study Film



2023 Study Films



“**In today's fragmented media landscape, securing consumer attention is critical to a brand's success. For brands looking to engage and sustain consumer attention, cinema stands out from the pack. Attention measurement data unequivocally demonstrates that cinema outshines all other ad-supported platforms, offering an unmatched environment for advertisers to break through to audiences.**”

Manu Singh

SVP, Insights/Analytics & Data Sales Strategy, National CineMedia

Key Findings

- 1** Cinema ads draw greater attention than all ads on all competing platforms across creative lengths and categories.

- 2** Cinema's lead in average seconds viewed increased for 30-second ads when measured with a broader sample vs. 2022.

- 3** Storytelling triumphs on the big screen; attention scores drop on other premium video platforms as ad length increases.

- 4** Big-ticket items and trust-centric categories thrive in cinema. Insurance, Pharma and Government garner high attention, along with Auto, Retail, and Tech.

- 5** High attention is consistent across both blockbusters and smaller movie titles.

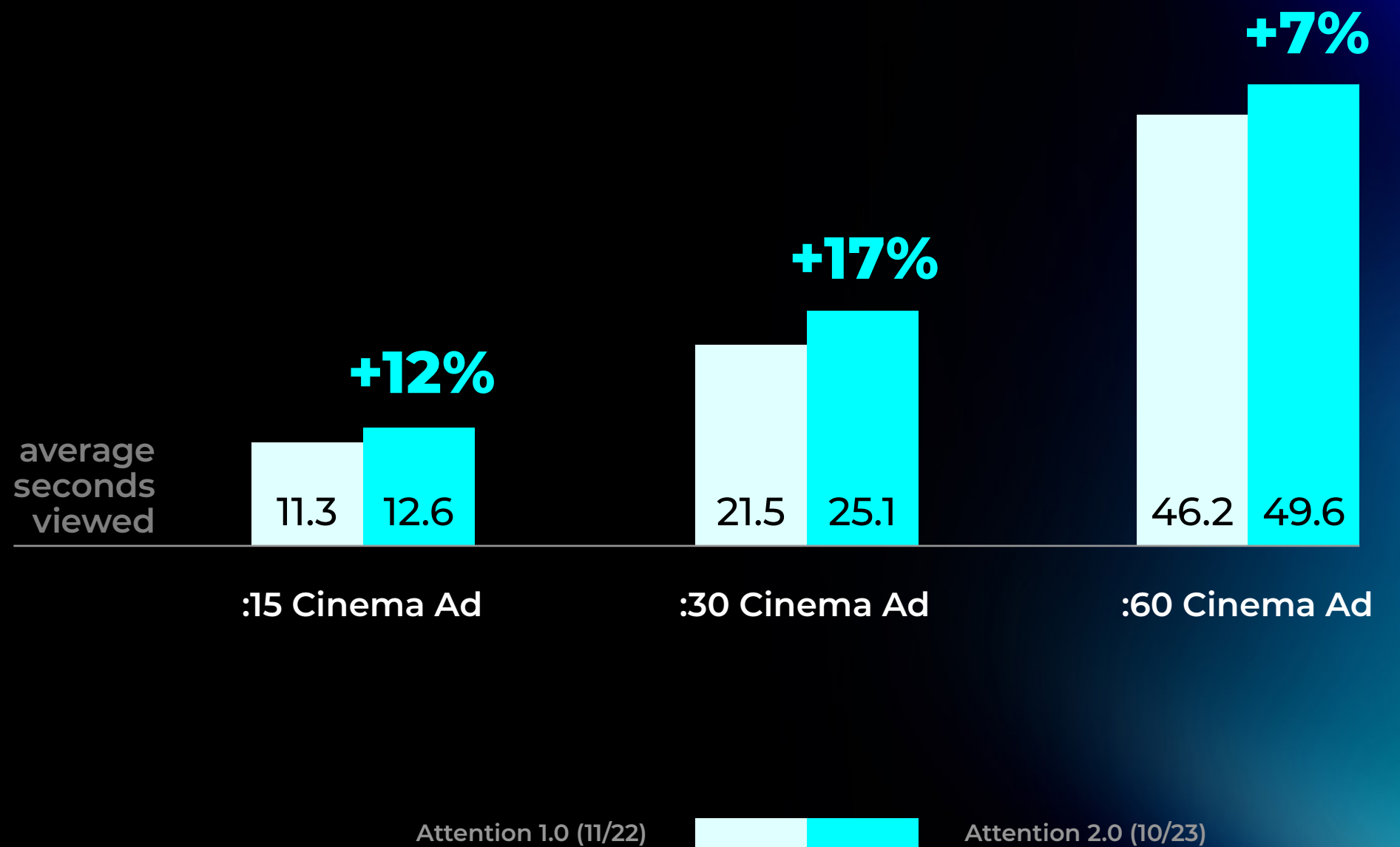
- 6** Cinema's Attention Advantage ranges from 2x to 6x that of linear live sports, FAST Networks, and premium AVOD.

- 7** Big screen Attention Advantage spans across key age breaks and DEI consumers.

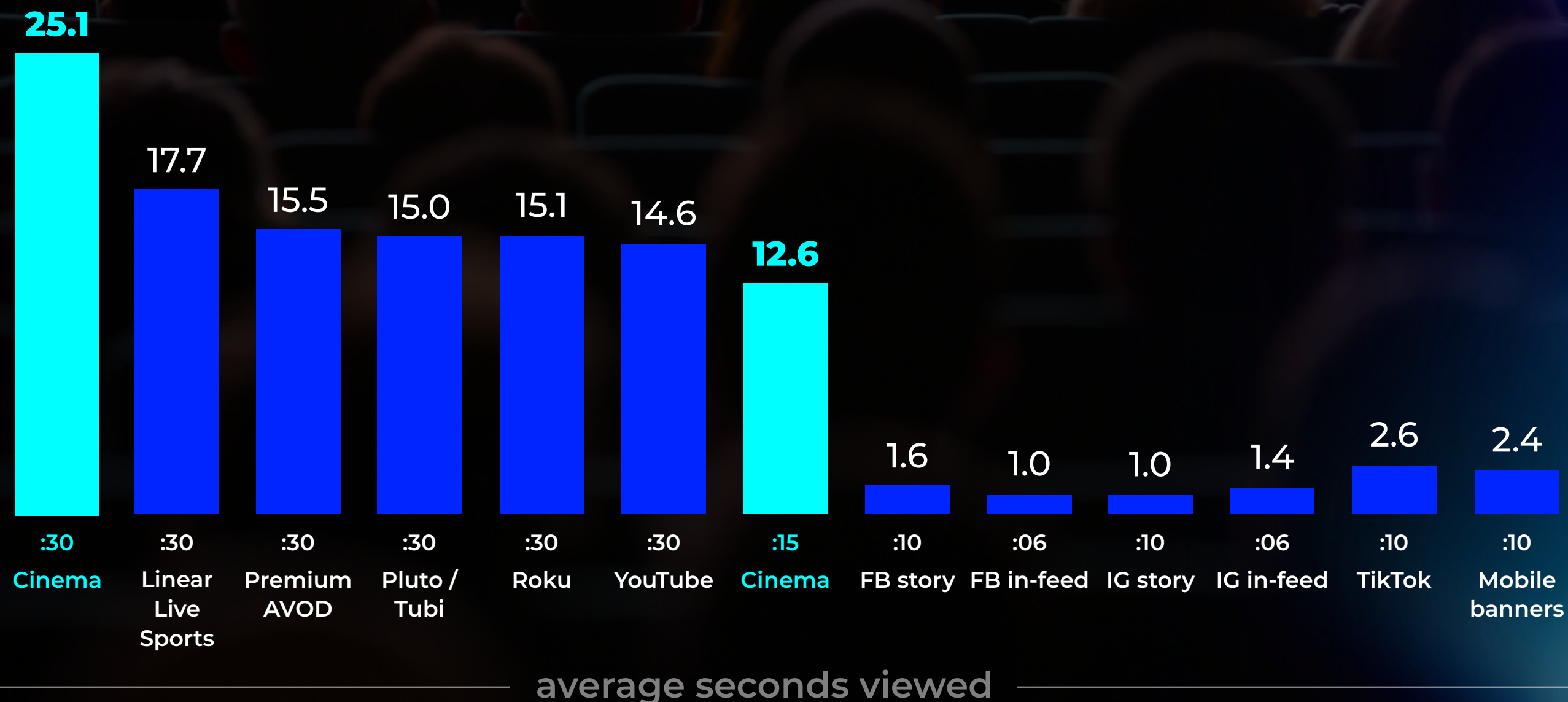


The Results

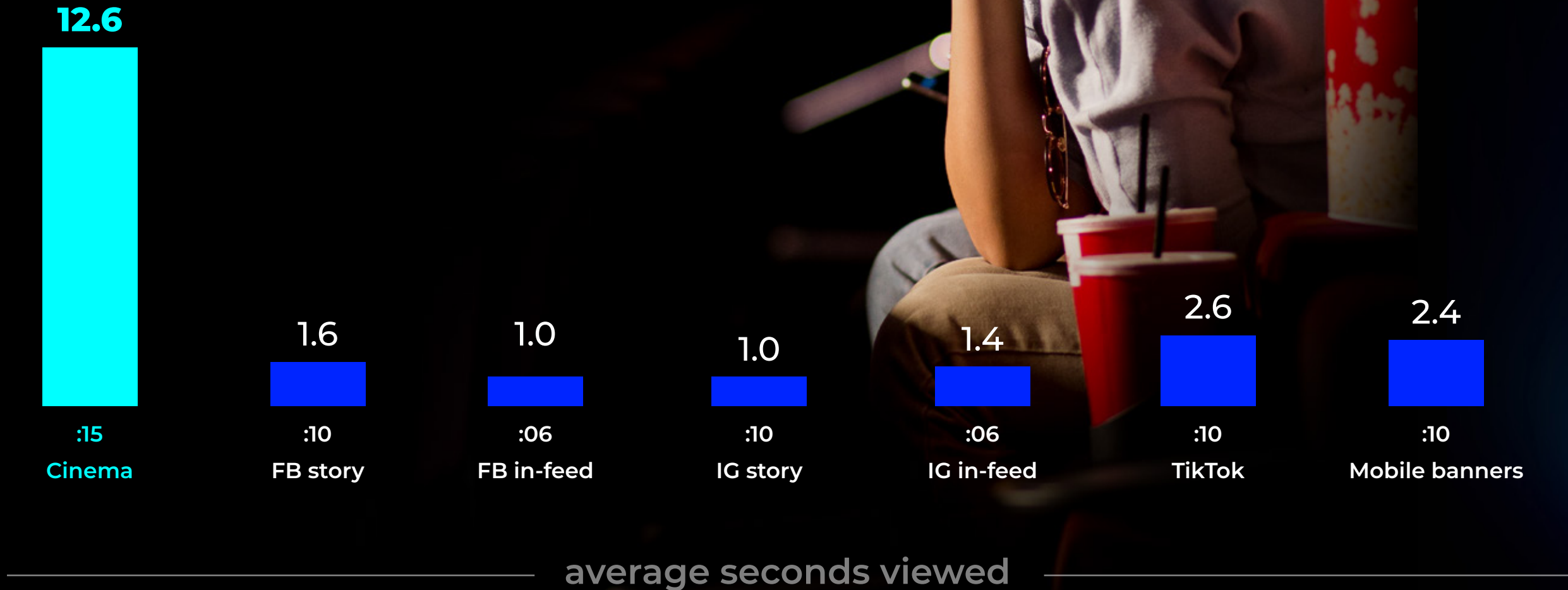
Cinema's lead in average **seconds viewed increased** vs. Attention 1.0.



Cinema consistently commands more attention than any other form of media, including Linear Live Sports, Fast Networks, Premium AVOD, and Digital Premium Video.

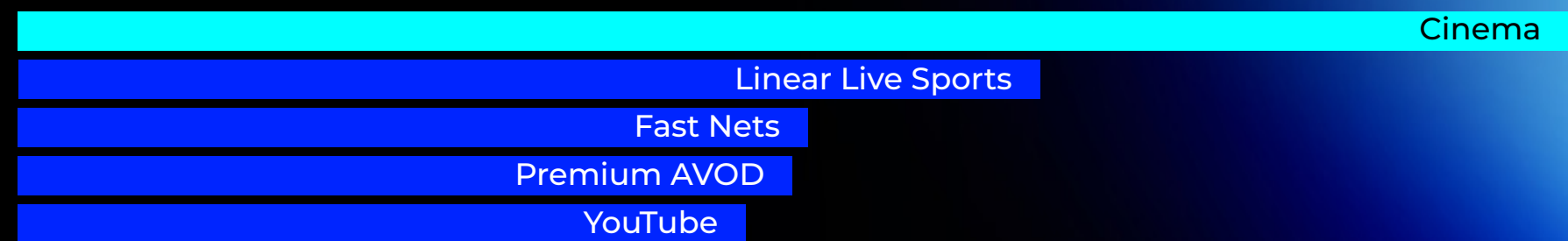


Cinema outperforms social and digital platforms with 6-16X greater attention.

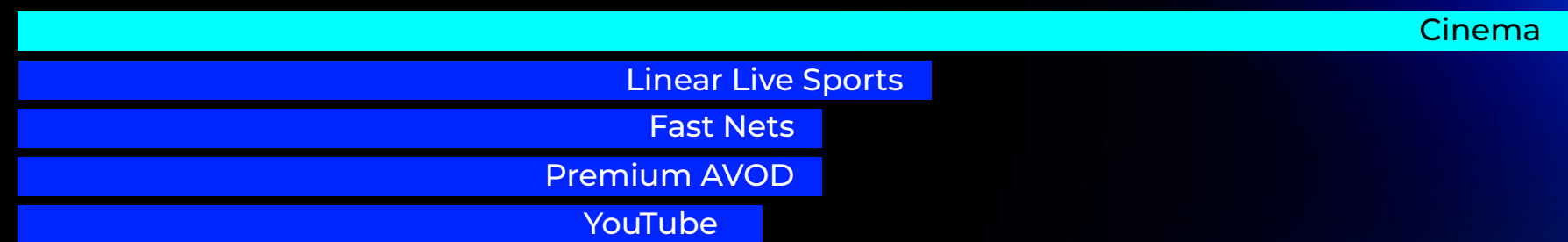


The big screen
consistently holds
the attention of
97%+ of the audience.

:60 Ad



:30 Ad



:15 Ad



0%

50%

100%

% of audience viewed

As Ad Length increases,
cinema's advantage is
3-6X greater.

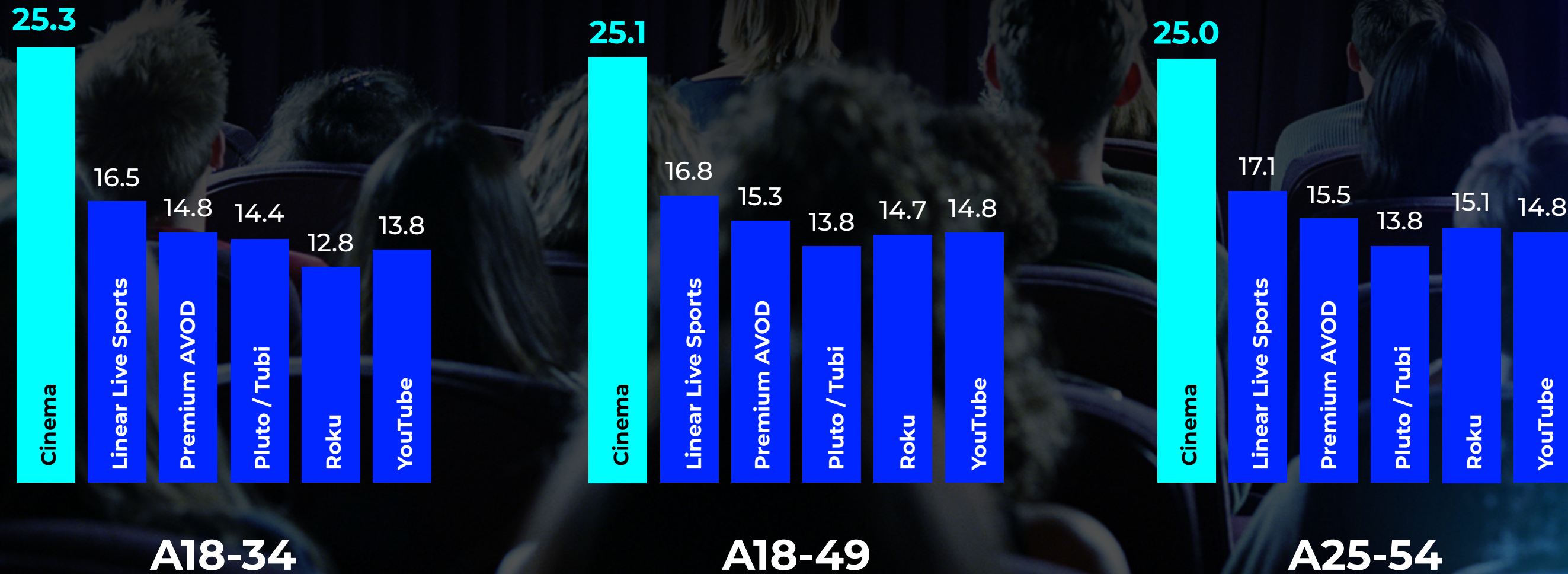
:30 Second Ad

	Linear Live Sports	Premium AVOD	Pluto / Tubi	Roku	YouTube
Cinema Advantage	2x	3x	3x	3x	3x

:60 Second Ad

	Linear Live Sports	Premium AVOD	Pluto / Tubi	Roku	YouTube
Cinema Advantage	3x	5x	5x	5x	6x

Cinema's Attention Advantage is 3-4X greater than the competition across **key age demos**.



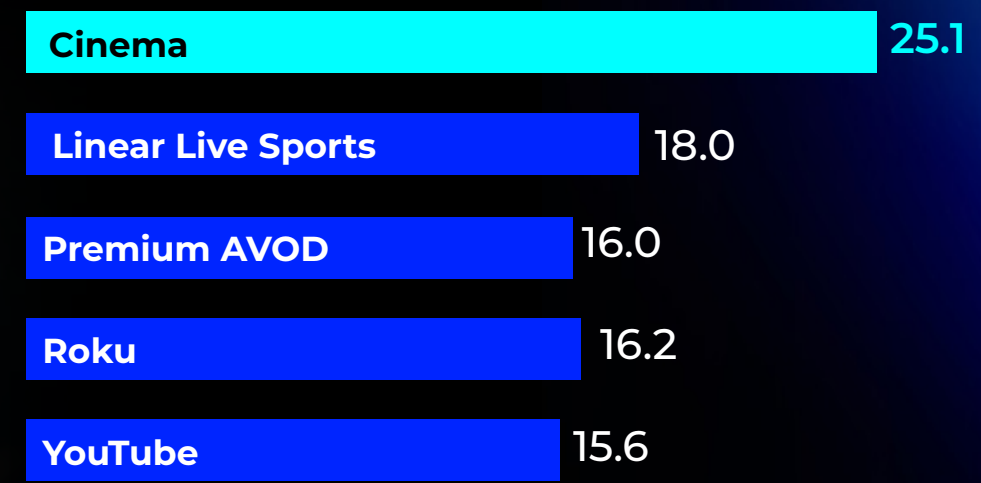
average seconds viewed (:30)

Cinema provides the **most engaging platform for DEI audiences.**

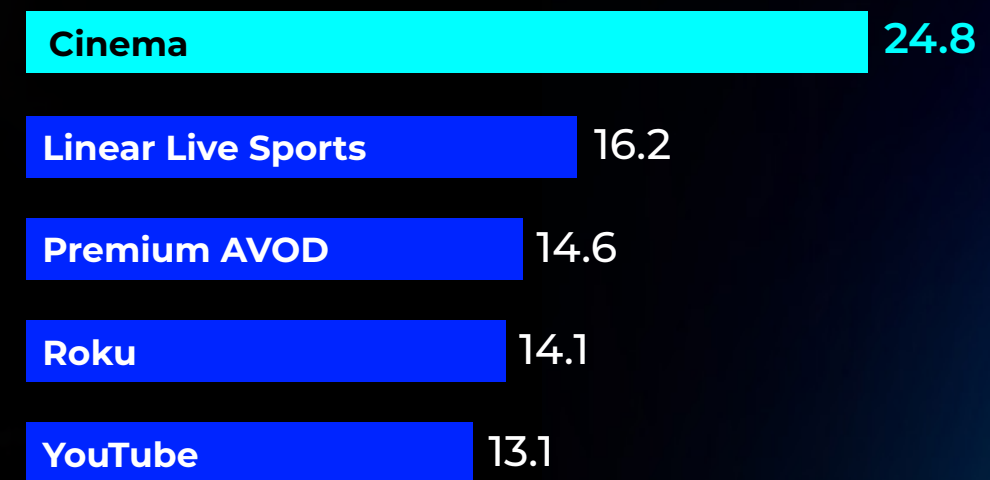


average seconds viewed (:30)

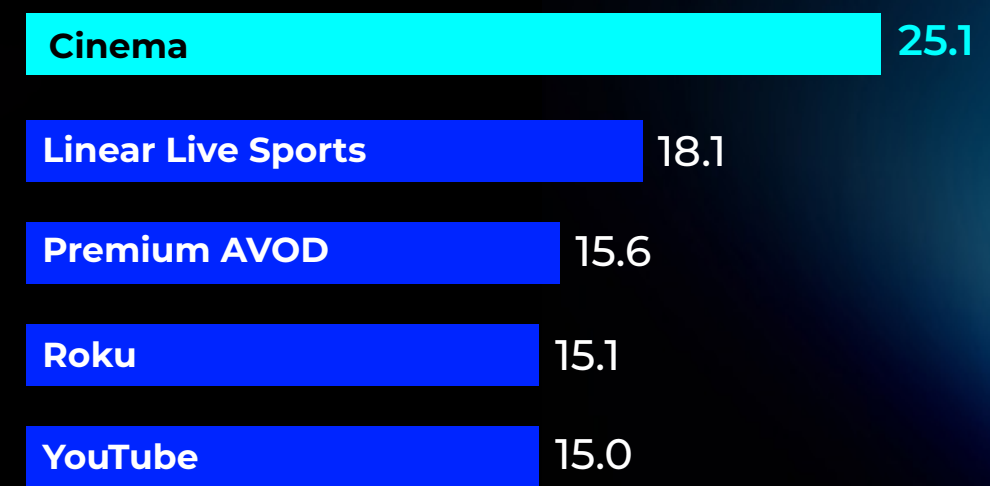
Latino / Hispanic



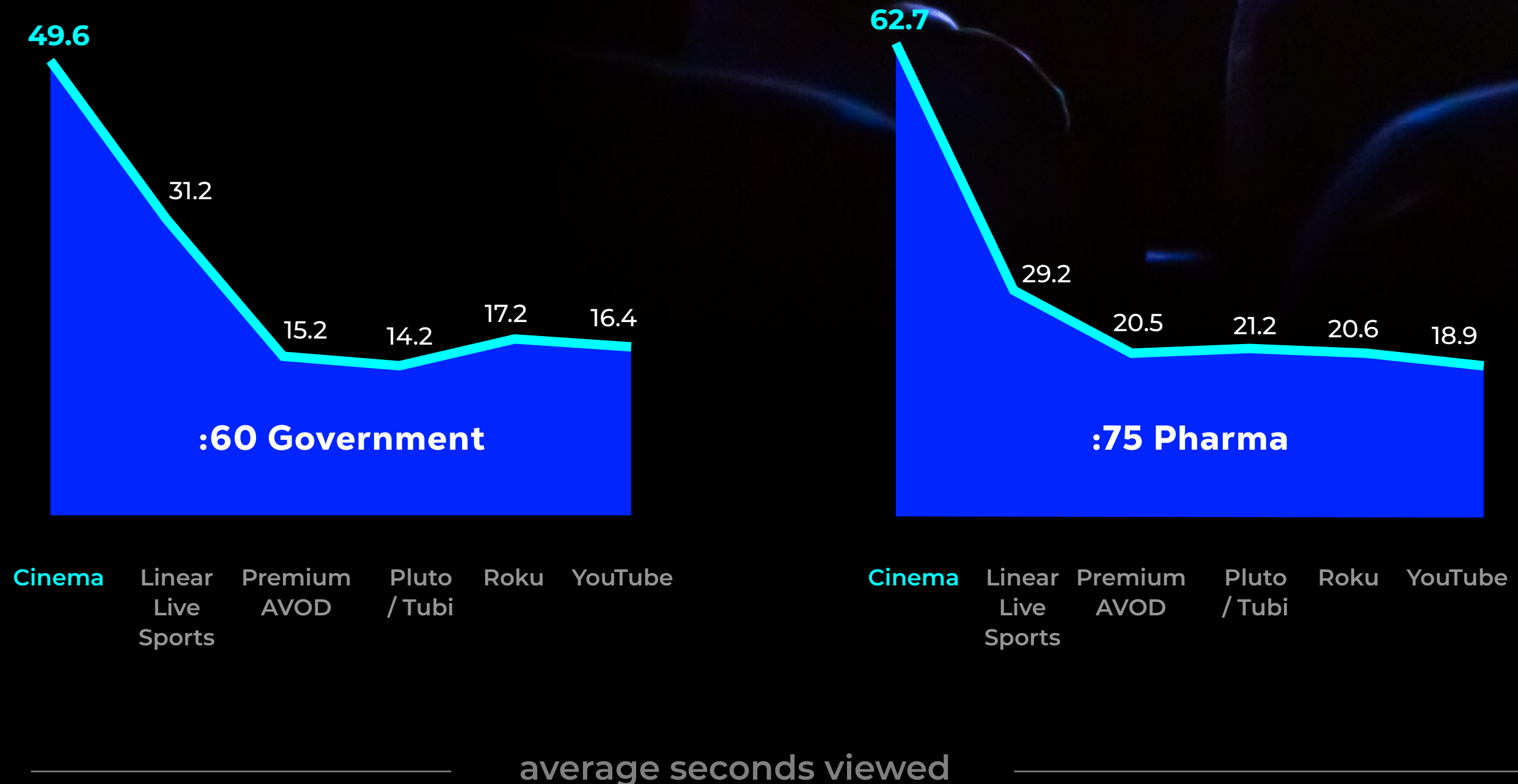
Black or African American



White / Caucasian

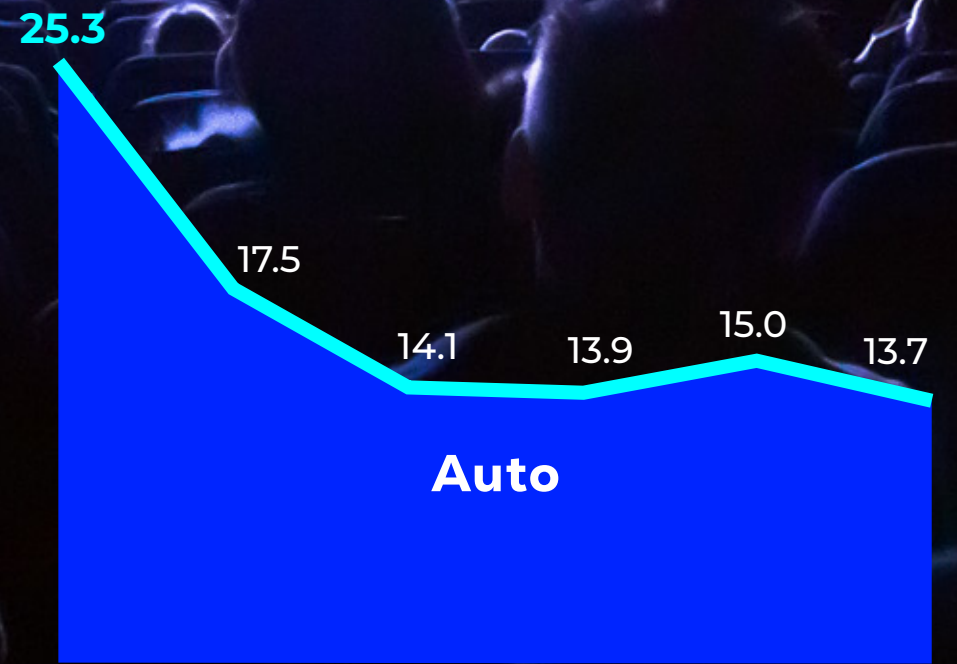
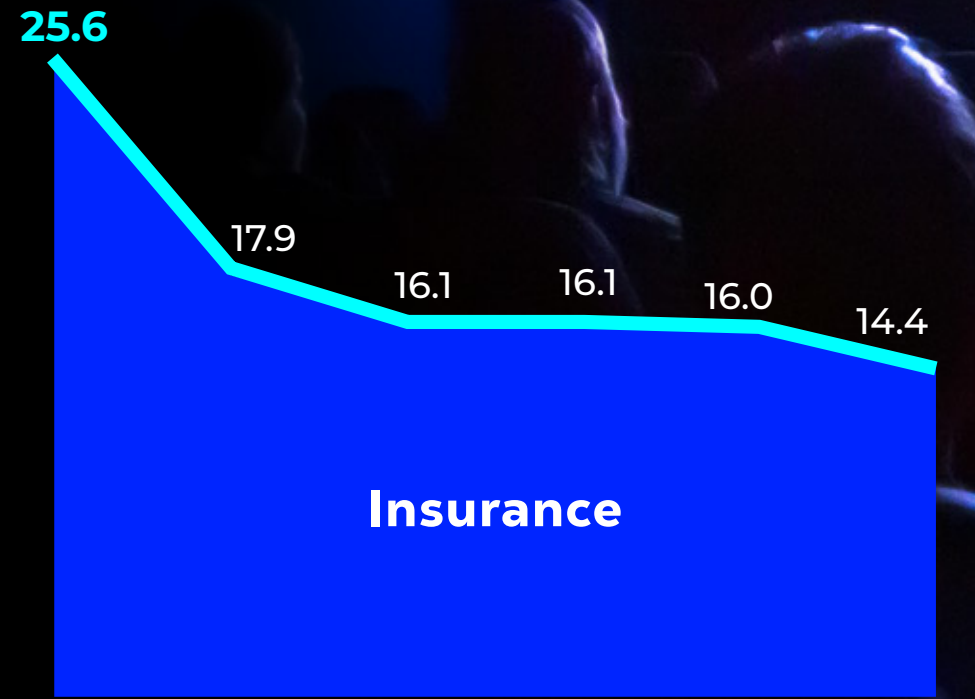


All categories **garner higher ad engagement** in the theater environment, especially those that require deeper trust.



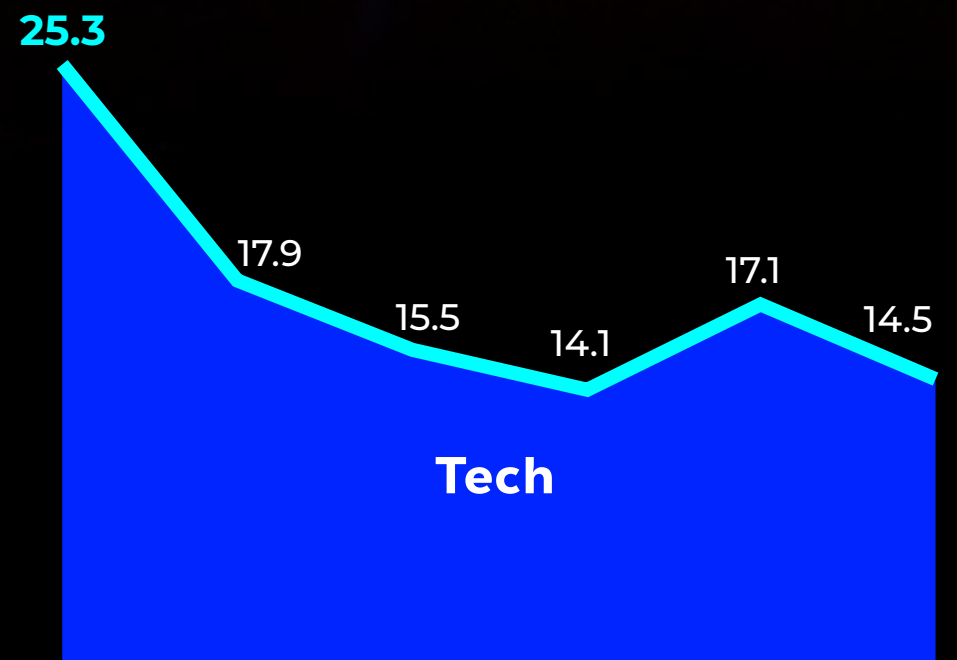
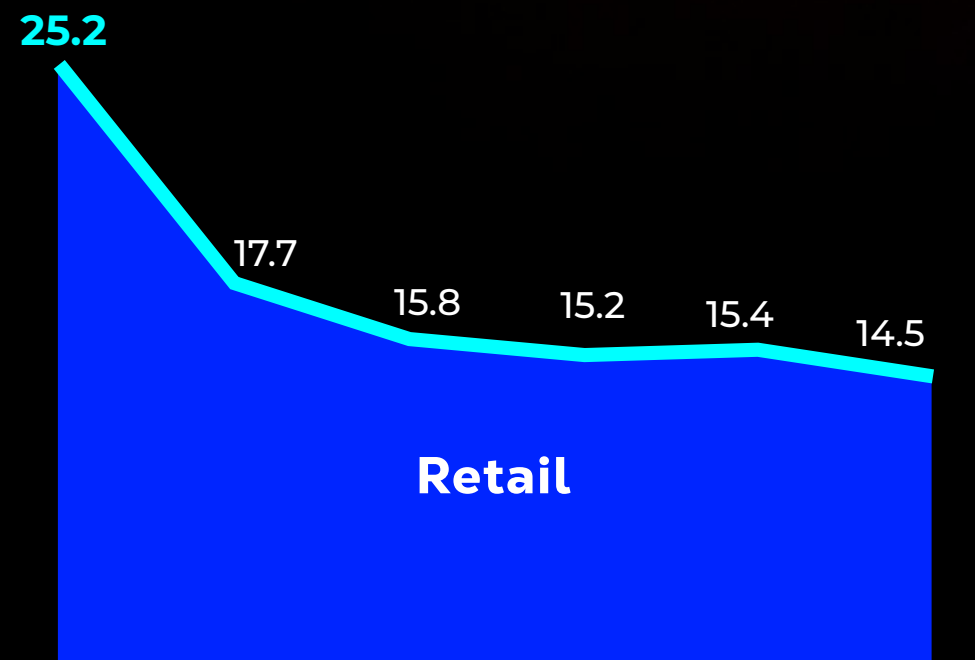
Cinema cements its status as the **go to platform across a diverse array of categories.**

average seconds viewed (:30)



Cinema Linear Live Sports Premium AVOD Pluto /Tubi Roku YouTube

Cinema Linear Live Sports Premium AVOD Pluto /Tubi Roku YouTube



Cinema Linear Live Sports Premium AVOD Pluto /Tubi Roku YouTube

Cinema Linear Live Sports Premium AVOD Pluto /Tubi Roku YouTube

Attention is the Future of Video Media

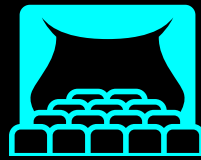
Higher attention scores are strongly correlated with results across the entire funnel, from awareness to sales and foot traffic. Evaluating attention across all platforms is crucial to the media planning and buying process. Plans that disregard attention metrics fail to account for how consumers engage with video platforms, potentially leading to wasted impressions.

To support this goal, NCM has partnered with Adelaide to integrate cinema data into Adelaide's attention-based media measurement platform. Cinema's integration into the platform allows brands to analyze cinema alongside other media options as they plan their campaigns. Adelaide's attention transaction metric (AU) provides the probability of attention and subsequent impact of an ad's media channel placement. It is generated by a machine learning algorithm trained to proxy full-funnel outcomes. Adelaide has worked with dozens of brands including Microsoft, the NBA, the Coca-Cola Company as well as several major media agencies. Based upon an analysis of nearly 40 studies, AU has helped advertisers achieve a 56% lift in attribution.

Adelaide

“**Measurement augmented by attention signals has a track record of increasing transparency of media quality,**” said Ron Amram, Sr. Director, Global Media at Mars. **“So it’s exciting to see AU ratings on new media types and formats.”**

Study Methodology



Respondents

364 Adults 18+

Movies

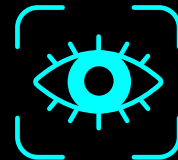
Dumb Money
The Creator

Fieldwork

Oct 8-9; 11-12
2023

Markets

NY & LA



Screenings

6 per market

Theaters

AMC Kips Bay 15, NY
Century Stadium 25 XD, LA

Format

Respondents exposed to
NCM pre-show and trailers

6 in-theater infrared
cameras captured
second-by-second attention



TV Norms

Linear Live Sports, Premium AVOD, Fast Nets, YouTube
TVision (Oct'22-Oct'23) n=5,000 HHs*

Social / Digital Norms

Lumen Panel Data, 2022-2023

Key Metrics / Calculations

% of audience viewed = % of audience that viewed the ad
any point while the ad was onscreen

Average seconds viewed = Amongst those who viewed,
the average time spent viewing the ad

Attention score = (average seconds viewed/ad length)
x % of audience viewed

**Attention advantage calculation is based upon an
attention score.**

	Attention Study 1.0	Attention Study 2.0
Sample	150	364
Markets	LA	LA & NY
Movie Title	<i>Black Panther: Wakanda Forever</i>	<i>The Creator & Dumb Money</i>
Type of Pre-Show	Custom Pre-Show	Custom Pre-Show + 'Live' Pre-Show
Competitive Norms	Linear, Linear Live Sports, Awards Shows, CTV	Linear Live Sports, Premium AVOD, Fast Nets, YouTube
Video		
Digital / Social	Facebook, Instagram, TikTok, YouTube	Facebook, Instagram, TikTok, Display (Desktop and Mobile)
Audio		Podcast
Categories	10	14
Creative Units	:15, :30, and :60	:15, :30, :40, :45, :60 and :75
Creative Comparison		At the Brand Level and By Type
Demos	Age and Ethnicity / Race	Age and Ethnicity / Race
Methodology	Eye tracking technology (infrared)	Eye tracking technology (infrared)

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