

Sorry, You Can't Measure That (and who really wants to anyway?) Part 1: Attentiveness

By Steve Sternberg



Back in the day (1980s, 1990s, 2000s) there was considerable debate about whether viewers were more attentive to commercials within TV shows they were more attentive to. Some felt that during commercial breaks in shows that were more intense (typically dramas), with more lean-in viewing, people tended to take a breath, lean back, and not pay as much attention. Others believed it was more likely that viewers paid more attention to commercials in their favorite shows, where attentiveness levels were already high, and their senses more alert.

There was, of course, no persuasive research supporting either view, so it remained largely an academic discussion. Neither was there any good research into attentiveness levels of the television shows themselves. There was some soft data from MRI and Simmons, which people occasionally looked at but didn't use in any significant way. And I'm not aware of any research since then that addresses the question of what type of programming inspires the greatest level of attentiveness.

A Sternberg Report Sponsored Message



The time is **NOW**
to begin your **Cyber Security Strategy**

Reach out to us for a free Cyber Security Assessment



[LEARN MORE](#)

emazzanti.net

844.360.4400



Whenever Nielsen ratings substantially decline and TV audiences continue to splinter, sellers become focused on adding things and pointing out that the actual number of viewers don't matter as much as (insert subject here). In other words, when you can't (or won't) improve, distract and change the subject. And new companies that claim to have the secret sauce or magical black box will emerge.

Today, as multi-channels on multi-platforms on multi-devices saturate the video landscape, **attentiveness** is again the big thing, even though you can't really measure it on an ongoing basis. But as is always the case, someone will proclaim to have unlocked the secret, someone will start using it, and a lot of other folks will fall in line. I learned long ago when pitching new business, that if you tell a prospective client something can't be done, and someone else tells them they have the secret sauce, they will often go with the someone else.

To be fair, there are several companies working in this space to make attention a business that scales, including *TVision*, *Adelaide*, *Lumen Research*, *Media Science*, Bill Harvey's *Research Measurement Technologies (RMT)*, and *MediaProbe* (a new company out of Portugal), each with its own innovative take on the subject. The ARF and CIMM have been doing work on attention metrics as well.

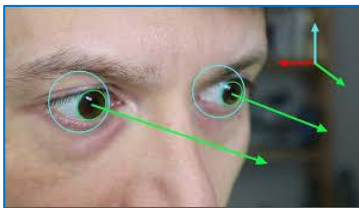


One problem is that **even if you could measure attentiveness** for individual networks, platforms, or TV shows, different samples would yield substantially different results. Demographic cohorts might theoretically watch the same programming (which was true 30 years ago, not so much today), but there's no research that indicates their attentiveness levels are similar. This means that while television viewing of age/sex demographics might be projectable, viewer attentiveness is not. You can look backward, but not forward. There's a reason why age/sex demos remain the foundation of audience guarantees.



Unlike TV viewing itself, **how much someone is paying attention** is not based on an individual's regular habits, behavior, or programming choices. You could be watching your favorite show while doing different other activities each time. You might be working on your laptop, playing a game on your phone, or scrolling through social media. You might be watching by yourself, with one, or with multiple people in the room.

None of these things will necessarily impact how someone is measured by Nielsen, but **they all impact attentiveness** – particularly to commercials.



Is someone more attentive if looking at the screen than if not looking at the screen? Of course. But while **eye tracking** might measure someone's visual gaze, it does not give an indication real attentiveness (i.e., mental focus). I could be looking at the screen and talking to my wife, or looking up at the screen briefly while working on my laptop, or looking at the screen with multiple friends or family, or with no one else in the room, and my attentiveness levels will be different in each case.

When Turner first introduced *TVinContext* in 2008, placing commercials adjacent to thematically relevant scenes, their research clearly showed a positive impact on viewer engagement. Context matters. Even if I'm watching two commercials in the same pod, if one is for a product I'm currently in the market for, I'm more likely to be more attentive.

So, while eye tracking is an important step forward, it does not measure actual attentiveness (and it's certainly not projectable).



What about **camera-based measurement** in people's homes to see precisely who is watching television and whether they are paying attention? This type of measurement, with a camera on top of the TV set, uses computer vision sensors to track who is in the room and "eyes-on-screen" attention (rather than just whether the TV is turned on). While camera-based measurement is the best way to capture who is watching in real time and whether they are paying attention, panelists who allow this technology into their homes are almost certainly not representative of the general population. And "eyes on screen" does not measure attentiveness when comparing something like live versus DVR viewing – eyes are on the screen when someone fast-forwards (which, of course, **does not indicate attentiveness to the commercials**).



When I was head of audience analysis at Bozell, TN Media, and Magna Global, I would periodically write a report titled, ***You Don't Need to Prove the Sky is Blue***. The gist was that some things are self-evident – so obviously true that it requires no further proof or analysis. And if any research from a particular sample comes to a different conclusion, that research or sample is anomalous or fundamentally flawed (i.e., wrong).

So, what does this have to do with television viewing attentiveness? While any ongoing measure of attentiveness for individual programs or networks is not feasible, there are a couple of things that are undeniably true.



VCR playback.

The first is that **live TV viewing results in significantly greater commercial attentiveness** than DVR playback. Virtually every analysis on the topic has shown that 70-80% of all DVR viewing involves fast-forwarding through commercials. This was also true of



The second is that **streaming platforms generate much higher commercial attentiveness** than linear TV. Those of us who watch both streaming and linear television (most of us) and also have the capability to pause and fast-forward (the majority of us), know that we are exposed to the commercials on streaming platforms to a significantly greater degree than on ad-supported broadcast or cable TV – simply because when you are streaming, you can't fast-forward through the commercials and there is basically no channel switching.

In both of these cases, I'm not referring to the difference in attentiveness levels when viewers are actually watching the commercials. There's a big difference between comparing platforms or shows where people are watching the ads, versus looking at it from zero – where **the opportunity to see the commercial is dramatically different**. There is no question that viewers watching a TV show live are much more likely to be exposed to commercials than those watching via DVRs, and streaming viewers are much more likely to be exposed to commercials than linear TV viewers. **This increased exposure leads to a higher percentage of commercial attentiveness and ad recall.**

So, while we know attentiveness and ad recall must be greater among live versus DVR viewing, and among streaming versus linear TV viewing, the question is **can we quantify the differences?**



A dozen years ago, when I was head of audience analysis at ION Media, my group conducted a study that I believe is still the best (only?) analysis **comparing engagement and ad recall between live and DVR playback viewing.**

The main reason this type of research isn't common is because neither buyers nor sellers want to officially quantify what we all logically know to be true – people watch and remember ads in TV shows they view live at significantly higher rates than shows they view via DVRs (when they can fast-forward through commercials). The same is true for streaming versus linear viewing.



Shifting media alliances have negatively affected the breadth and depth of industry research. When broadcast and cable networks became siblings under the same corporate umbrella, it started to affect the type of research these expanding media conglomerates were

willing to underwrite. This solidified further as their parent companies developed their own streaming platforms. Highlighting the strength of one network they own might show the weakness in another.

The broadcast networks and cable television trade organizations used to do a fair amount of research showing their strengths and demonstrating their competitors' weaknesses (who remembers CBS's *The Cable Fable?*). The CAB is now the VAB (Video Advertising Bureau), with membership including both broadcast and cable networks – which means we see studies extolling the virtues of TV advertising, but not anything that highlights the strengths or weaknesses of broadcast versus cable, live versus delayed viewing, or linear versus streaming.



The upfront sales pitch is no longer “Broadcast is bigger and better, and the only place to reach your customers all in one place” or “Our cable network has the most engaged audiences and is the only one that can effectively compete with the broadcast networks.” In

essence, they are all telling us that they – **Disney** (ABC, ESPN, Hulu, Disney+...), **Paramount Global** (CBS, MTV Networks, Showtime, Paramount+ ...), **Comcast** (NBCUniversal, USA, Syfy, Bravo, Peacock...), and **Warner Bros. Discovery** (Turner and Discovery cable networks, HBO, HBO Max...) – are basically all the same: self-contained, massive communication hubs, and unrivaled unified companies, armed with multiple networks, platforms, and genres, that can reach everyone, everywhere, all at once.

As a result, **there is seldom any good research** that highlights the weaknesses of any part of these entities (which also results in little research showing the strengths of other parts). Advertisers (remember them?) are often left with nebulous studies proclaiming “advertising works,” along with assurances that if they just add this, optimize that, or use this new and improved planning or buying tool, everything will be better. And if any research indicates that there’s no significant difference between platforms when it comes to attentiveness, ad recall, and the like, most everyone tends to gravitate toward it (whether or not it’s valid).

Back to **live versus DVR viewing**. On the seller side, cable news networks, sports networks, and networks such as Adult Swim and Nick-At-Nite (and a few other networks that are mostly viewed live) would benefit from such research. Most of the other networks in media conglomerate stables would suffer. On the buyer side, agencies don’t really want to demonstrate to advertisers that most popular and heavily recorded TV shows they are buying has the most ad avoidance and lower commercial attentiveness.



At the time, ION (now owned by Scripps) was an independent network, whose programming consisted almost exclusively of off-network repeats, which are largely watched live (more than 95% of ION's adult 25-54 average audience at the time watched its shows live). **Highlighting the advertising strength of live viewing** would be a major selling point and would not hurt any other part of the company.

Trying to measure ad recall a day or more after the commercials aired is not particularly meaningful unless it's at the start of a new ad campaign with new creative that is airing for the first time. Otherwise, you don't really know where the respondents actually saw the commercial. Much better is measuring ad recall right after the program airs.

I got the idea for this analysis from a CAB study that was conducted roughly 30 years ago, which remains the best I've ever seen on the subject. It was an unaided ad recall study, where adults 18+ were surveyed by phone at home during primetime about programming they had just watched (I believe they got permission from respondents to call them after 10pm). At the time, ad-supported cable networks were not yet producing original scripted programming, and they were still considered lower quality and less valuable than the much higher rated broadcast series. The study demonstrated that there was no statistical difference between broadcast and cable based on verified recall of the commercials.

There were also a lot of other interesting findings about the impact of commercial pod positioning and length. The main purpose of the study was to show that cable should have the same value per rating point as broadcast.



We used a similar approach, although the times had changed – we conducted our survey online rather than via telephone.

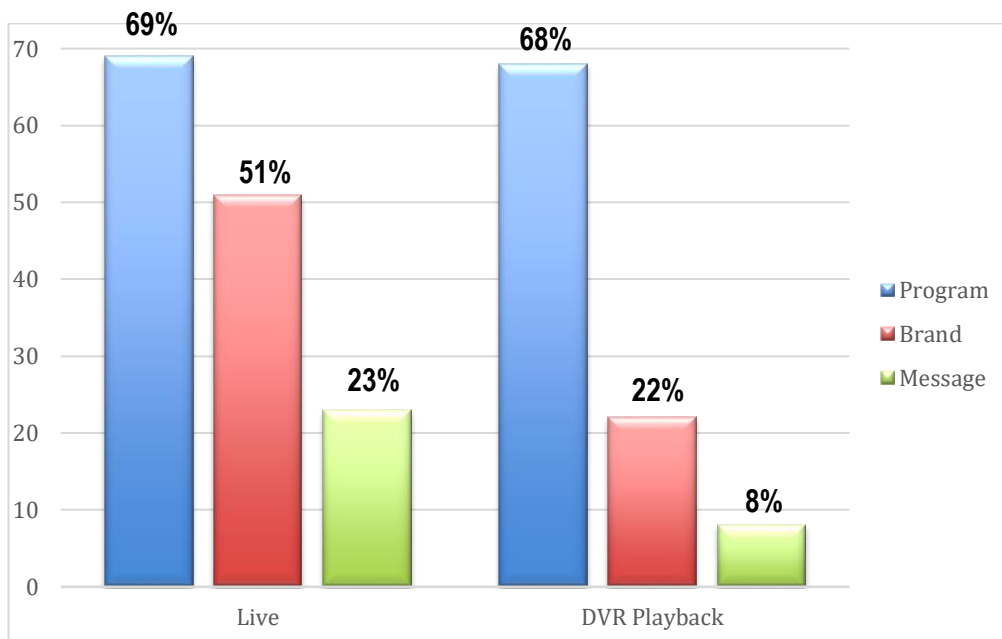
Here's what we did along with the results.

- Through a panel of television viewers we maintained with *Vision Critical*, we recruited members to participate in a special research study (there were 476 respondents).
- Respondents were allowed to watch any program they wanted, and could view the program live, at the time it originally aired, or via DVR playback. They only had to tell us the day and time they would be watching (it had to be between 7pm and 10pm).
- They were instructed to watch TV as they normally would. The only stipulation was that it had to be a regular program that contained commercials.
- Each participant was emailed a 9-question survey at 10pm the night they watched the program. If they submitted the completed survey by 11pm that night, they were placed in a drawing to receive one of three \$500 Amazon gift cards. We made sure they understood that correct answers were not necessary to win the prize – so if they recorded a show they needn't go back and try to find the right answers.
- Questions included asking respondents to list up to three plot points of the program, list all the brands they could recall in the commercials, and to list any specific messages they remembered from each brand they listed.

The results were eye opening but not really surprising.

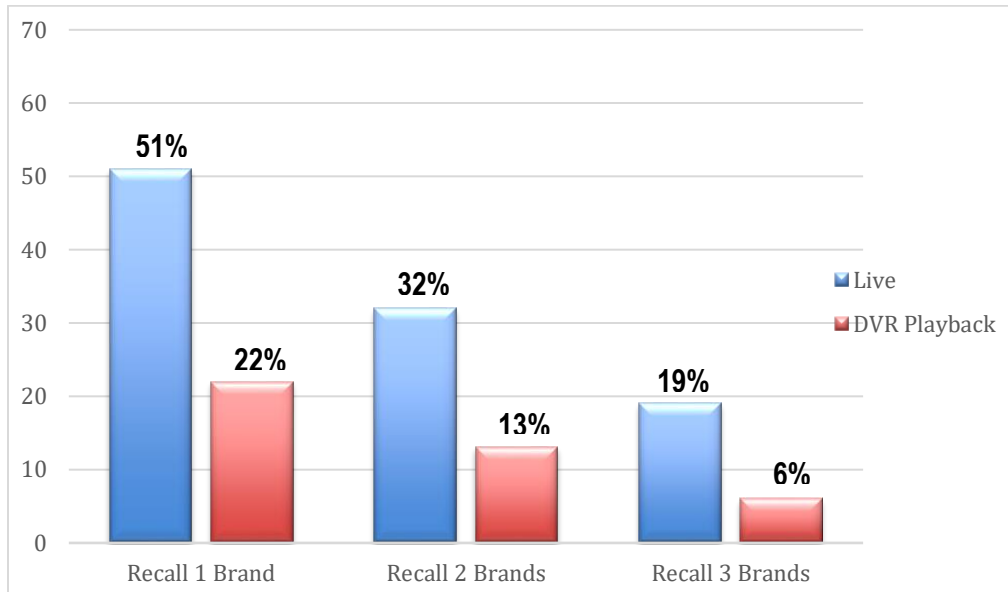
- **The percentage of respondents who recalled one advertised brand was 2.3 times greater among live viewers than among DVR viewers** (the percentage who recalled three brands was lower, but was more than three times greater among live viewers).
- **Brand message recall was roughly three times greater among live viewers.**
- **Attentiveness and recall to the program content was virtually identical for live viewing and DVR playback.** This was a key finding, which in my mind validates the study.

More Live Viewing Means Greater Commercial Ad Recall



Source: ION/Vision Critical Study – Primetime May 2014 – 476 respondents – Includes Drama, Comedy, and Reality series
Program – recall at least 3 plot elements; Brand – recall at least 1 brand; Message – recall at least 1 brand message

More Live Viewing Means Greater Brand Recall



Source: ION/Vision Critical Study – Primetime May 2014 – 476 respondents – Includes Drama, Comedy, and Reality series

When I left ION, I recommended that they replicate this analysis every year, so chances are there's more recent data out there. But despite changes in the media landscape over the past 10 years, there's no reason to think the difference in ad recall between Live and DVR viewers is much different.

So, how does any of this apply to advertising on streaming platforms? Streaming is in essence live viewing+. **People can't pause or fast-forward through the commercials, and virtually no one switches channels when they are streaming a series or movie.** There are also shorter and fewer commercial pods on streaming platforms, both of which we know (from numerous research studies) positively impacts ad recall.

The advantage of streaming over linear TV ads might not be quite as extreme as that of live versus DVR viewing (although it might be), but it is certainly substantial. I'd love to see more research done

on this. **It seems like a prime project for Nielsen, ComScore, VideoAmp**, or one of the other emerging potential audience measurement competitors to tackle. I'm not sure why Netflix hasn't already done this (since it has no linear component that would be hurt by the results).

In my view, this is really **the only way to measure attentiveness** on any ongoing basis, although it still doesn't drill down to the individual program level.

As always, comments, criticism, and suggestions are welcome and encouraged.