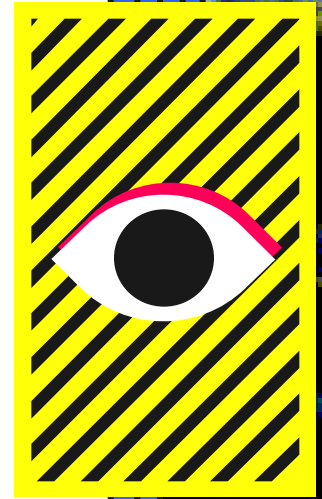
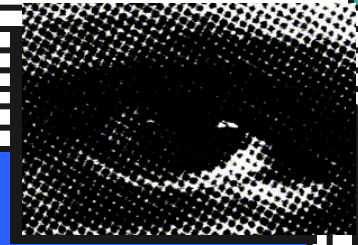


Capturing the attention

of our youngest generations





The digital advertisers' guide to reaching Adult Gen Z + Millennials on Connected TV

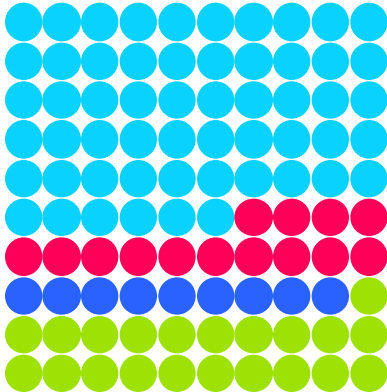


Gen Z and Millennials watch significantly more Connected TV (CTV) than any other generation

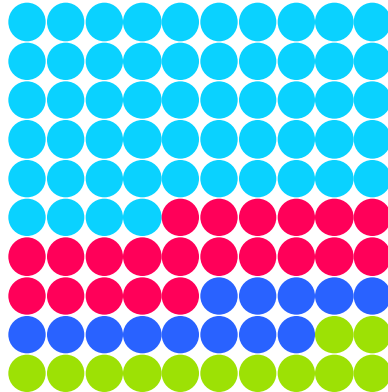
Share of TV Screen Usage by Generation, 2Q23

● Connected TV ● Cable ● Broadcast ● Other

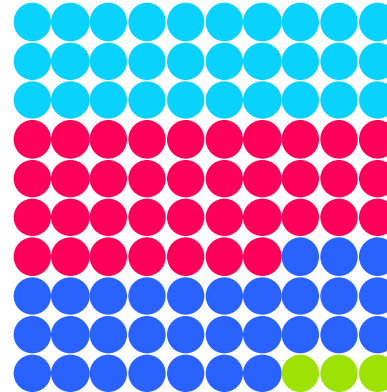
Gen Z



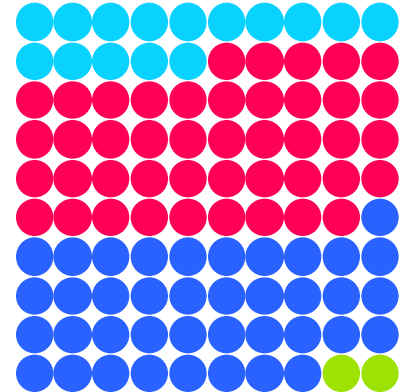
Millennials



Gen X



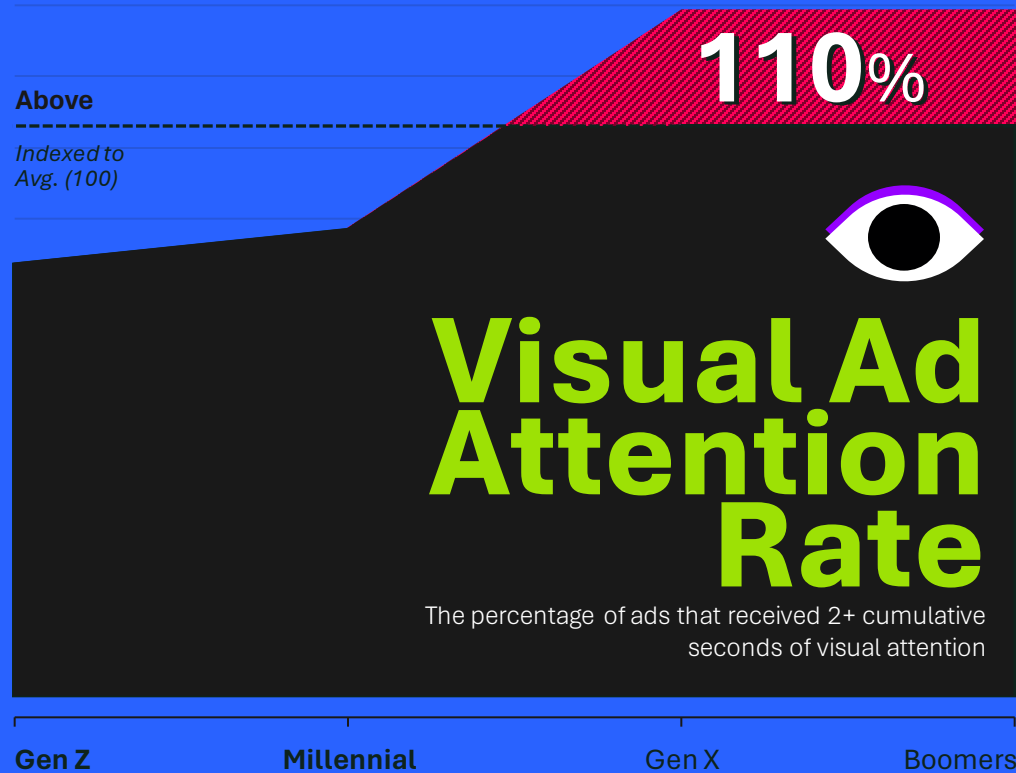
Boomers



Over half of their time spent is on CTV

Yet,
capturing the
attention of
younger
generations is
notoriously
difficult

Visual Ad Attention Rate for CTV Ads, Indexed



Visual Ad Attention Rate

The percentage of ads that received 2+ cumulative seconds of visual attention

Source: TVision Performance Metrics, 2H 2022
N (Ad Airings): Gen Z- 134,407; Millennial – 939,019;
Gen X – 1,934,312; Boomers – 3,299,336

gen z

**Advertisers
need to be
strategic with
how they
reach _____.**

**mille
nnials**

x o The plan

OUR OBJECTIVES

- Quantify **visual attention** to ads on Connected TV (CTV) to identify the ideal conditions for capturing attention
- Uncover when viewers are most **receptive** to ads on CTV
- Understand viewer **perceptions** of ads on CTV

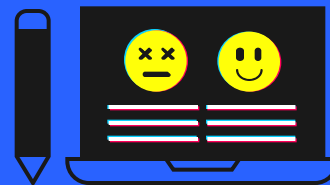
2-PRONGED METHODOLOGY



Visual Ad Attention

Passively tracked data from TVision's opt-in, at-home panel to capture viewability and attention to ads on CTV

1



Media Diary

Quantitative media diary to gauge ad receptivity and viewer perceptions of ads on CTV

2

Methodology

- Visual Attention

who

how

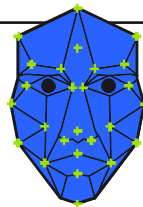
what

T»VISION

Nationally representative panel



Participants opted to install TV visual attention detection technology in their household



- Programming and ads captured via ACR (automatic content recognition)
- Viewability and attention measured using computer vision algorithms

THE DATA

6 months of data

2,717 individuals tracked

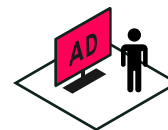
73,531 unique ads

1,288,346 viewing sessions

10,496 hrs of ads measured

H2 2022

THE METRICS



Viewability Rate:

% of ads in which a viewer was in the room for 2+ cumulative seconds



Visual attention rate:

% of ads that received 2+ cumulative seconds of visual attention (looking at screen)

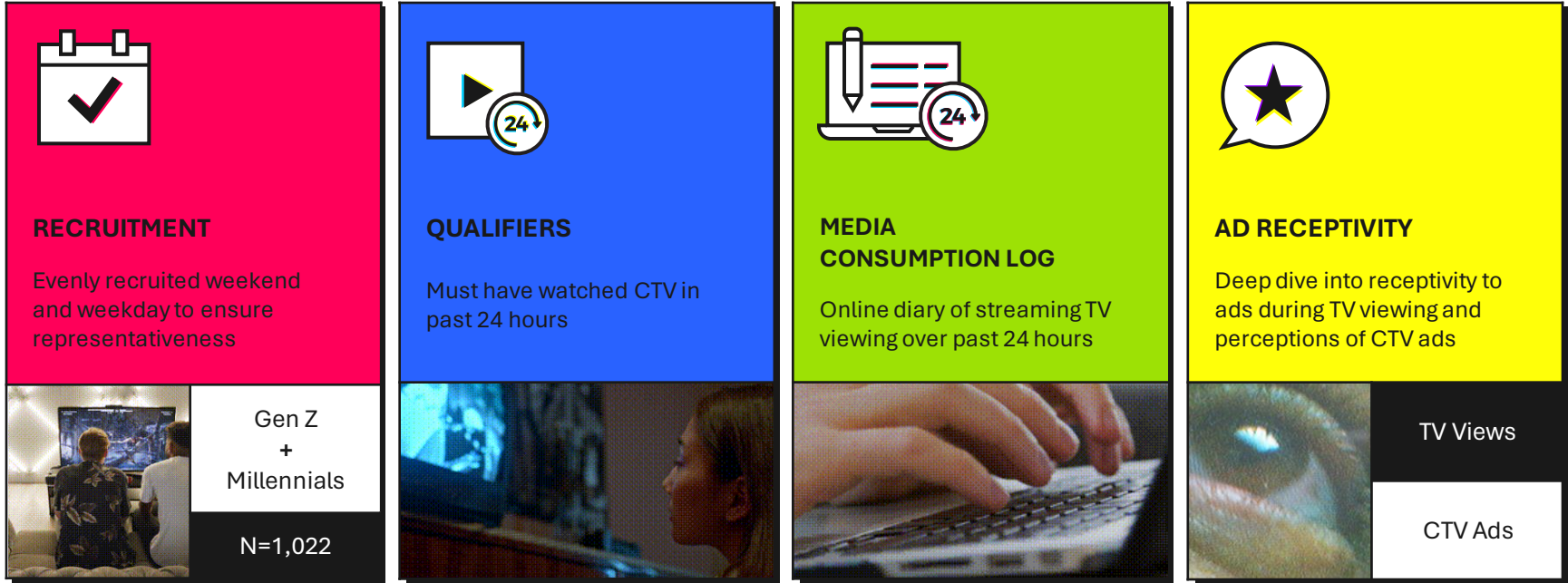


Visual attention time:

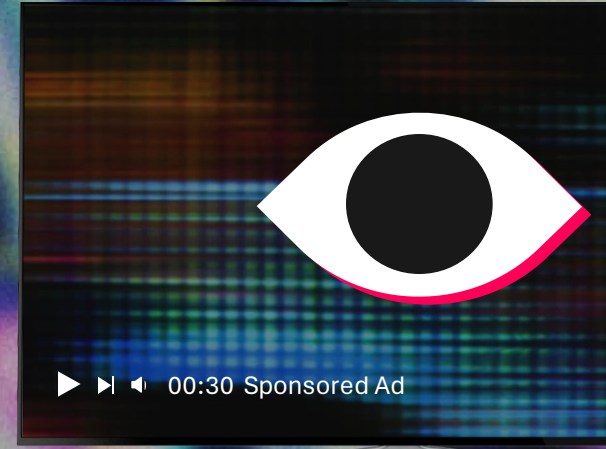
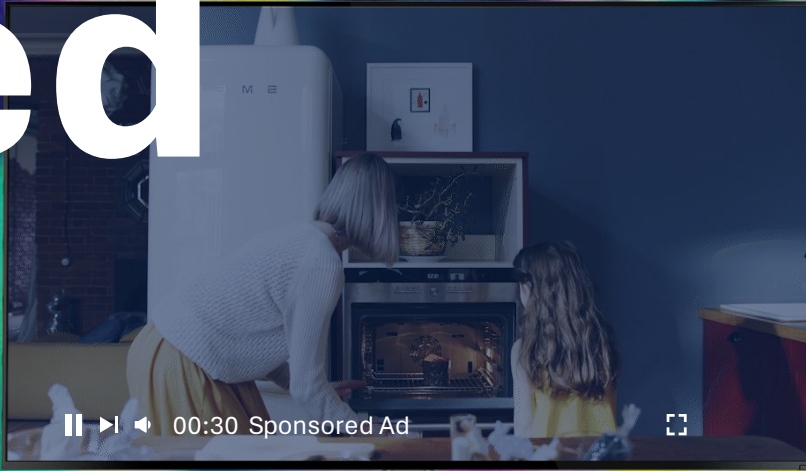
of seconds of attention (looking at screen) during ad play

Methodology

- Media Diaries



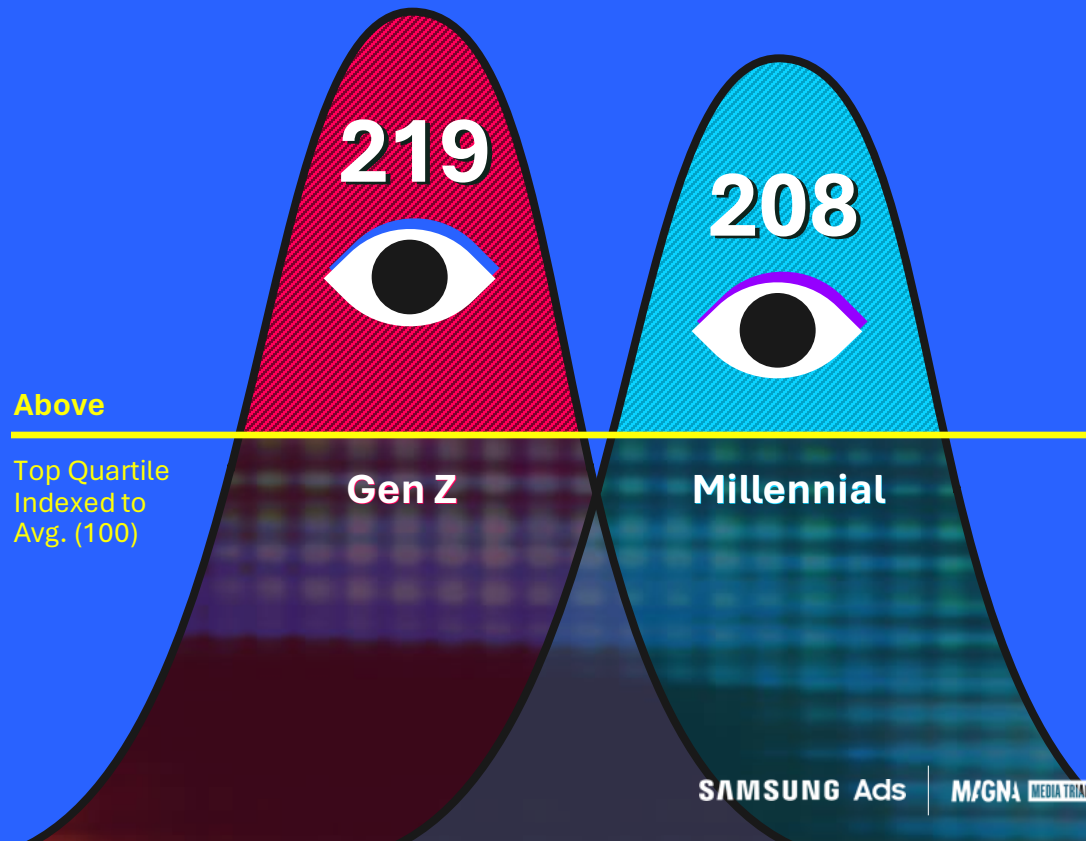
attentive opportunities, sized



Top performing ads demonstrate the *potential* to capture the attention of our youngest generations

Good media placement + good creative is over 2X as likely to capture attention

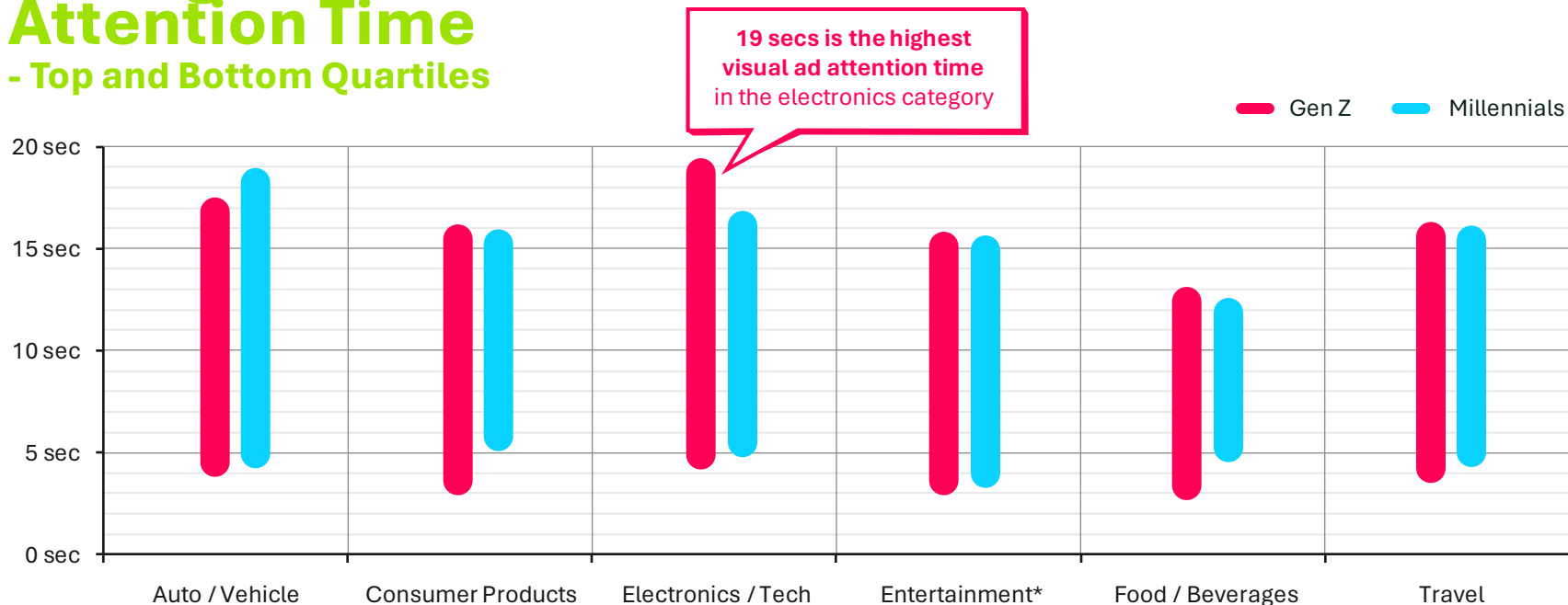
Visual Ad Attention Rate



TVision Performance Metrics, 2H 2022 | N (Ad Airings):
Gen Z – 4,922; Millennials – 25,924
Visual Ad Attention Rate: % of ads that received 2+ cumulative seconds of visual attention (looking at screen)

Immense opportunity for attention across verticals

Average Visual Ad Attention Time - Top and Bottom Quartiles



TVision Performance Metrics, 2H 2022 | N (Ad Airings): Auto/Vehicle – 33,821; Consumer Products – 12,679; Electronics / Tech – 10,252; Entertainment – 59,479; Food / Beverages – 22,841; Travel – 7,030

Visual Ad Attention Time: # of seconds of attention (looking at screen) during ad play

* Entertainment / Media / Leisure

Significant difference at >90% confidence between groups

Younger generations clearly see the upside of CTV ads

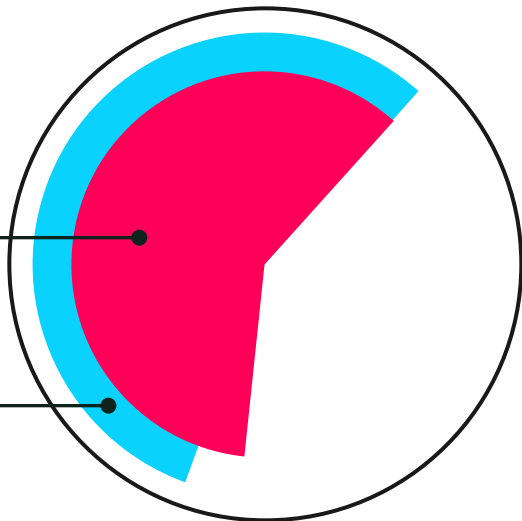
While CTV has better ads, marketers still need to be thoughtful about creative and media placement

Perceptions of CTV Ads

CTV has **better quality ads** than cable/satellite

60%
Gen Z

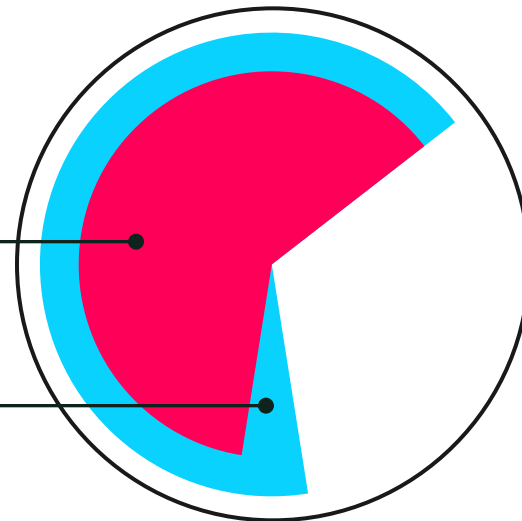
56%
Millennials



CTV has ads that are **more relevant to me** than cable/satellite

61%
Gen Z

67%
Millennials



gen z

What advertisers need to know about capturing attention on Connected TV

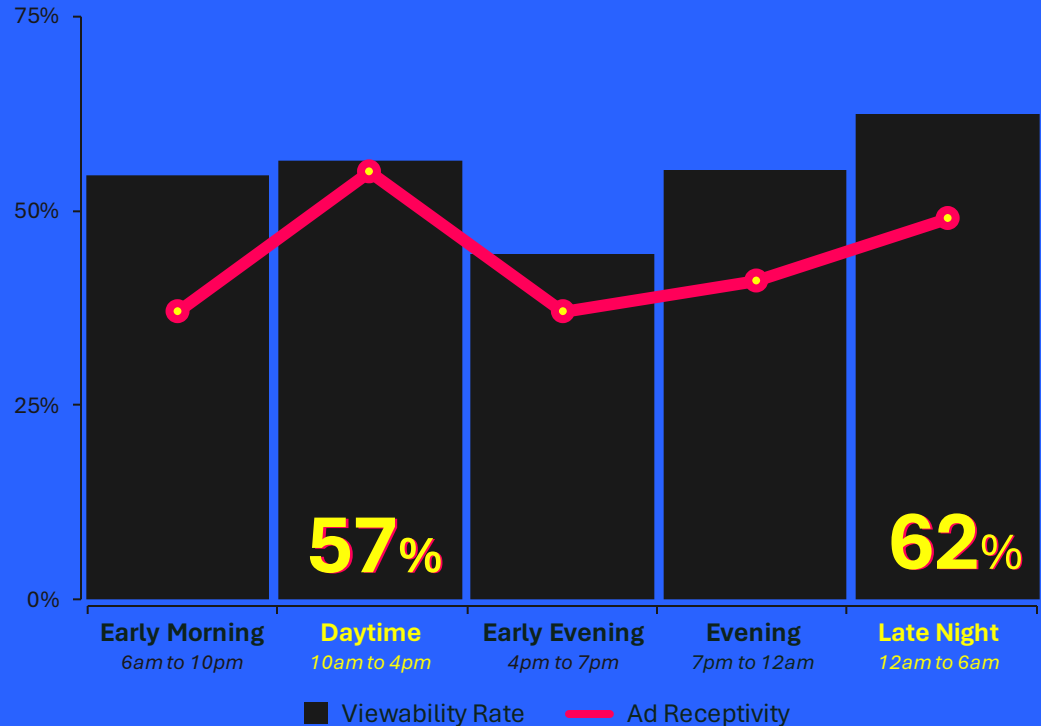
gen z



CTV Viewing - Gen Z

For Gen Z, ads are front and center during late night and daytime

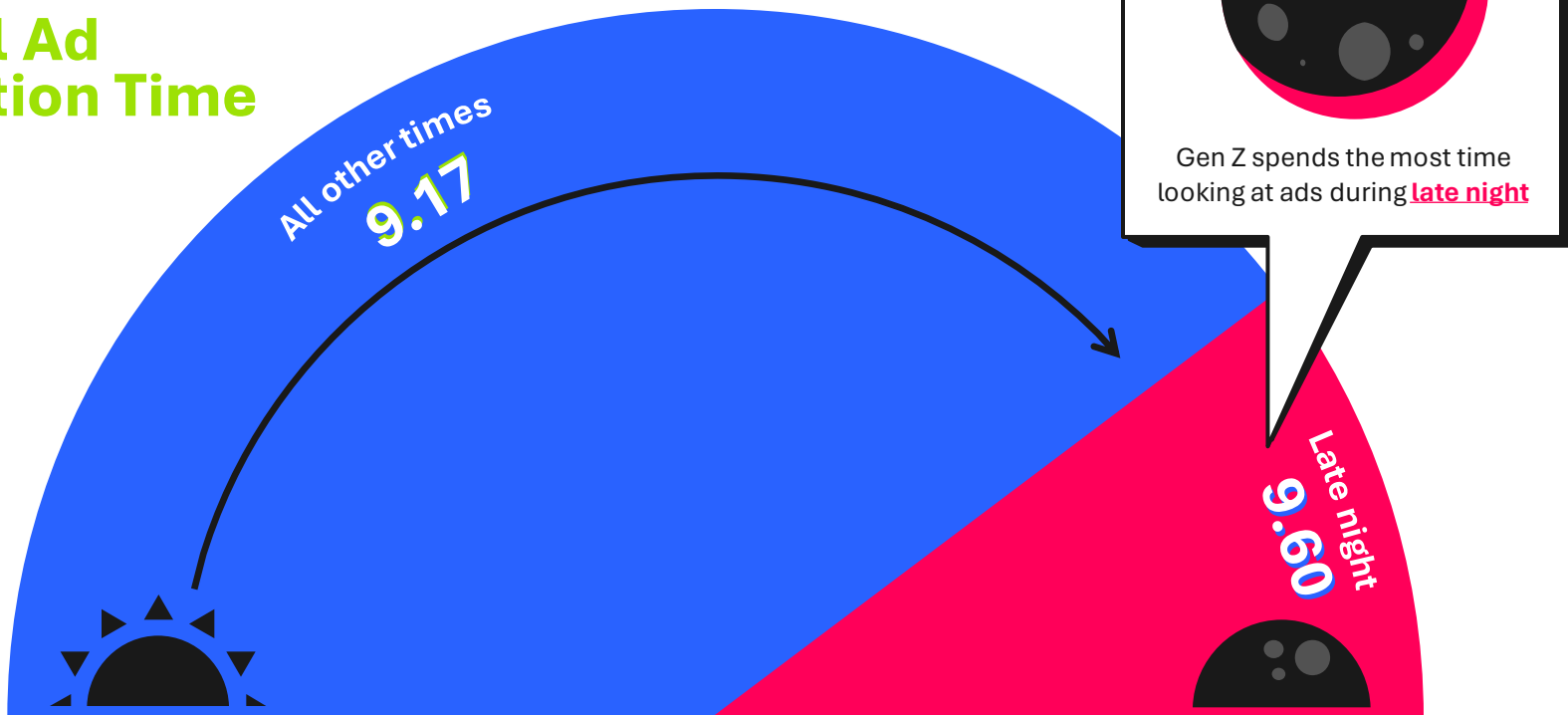
Not only are CTV ads most viewable during late night, followed by daytime, but they are most likely to reach a receptive Gen Z audience



TVision Performance Metrics, 2H 2022 | N (Ad Airings):
Early Morning – 6,484; Daytime – 11,306; Early Evening
– 13,408; Evening – 16,835; Late Night – 86,374
Viewability Rate: % of ads in which a viewer was in the
room for 2+ cumulative seconds
Significant difference at >90% confidence between
groups for viewability rate

With high attention,
late night is an untapped
opportunity for advertisers

Visual Ad Attention Time - Gen Z



Longer form content = openness to ads for Gen Z

Gen Z are least open to ads
during short spurts

By Content Type

#1 Movies, 52%

#2 UGC*, 49%

#3 Short Video, 46%

#4 TV Shows, 44%

Ad Receptivity by Duration of Viewing Session - Gen z

A couple hours

46%

About 1 hour

46%

Less than 1 Hour

38%

Media Diary | N = 267

Q Overall, how much do you agree or disagree with the following statements about the ads that appeared during your session? - I was open to seeing ads at the time

Q What types of videos did you watch during your session?

*UGC: Content created by people (e.g., DIY videos, unboxing videos, movie reviews, etc.)

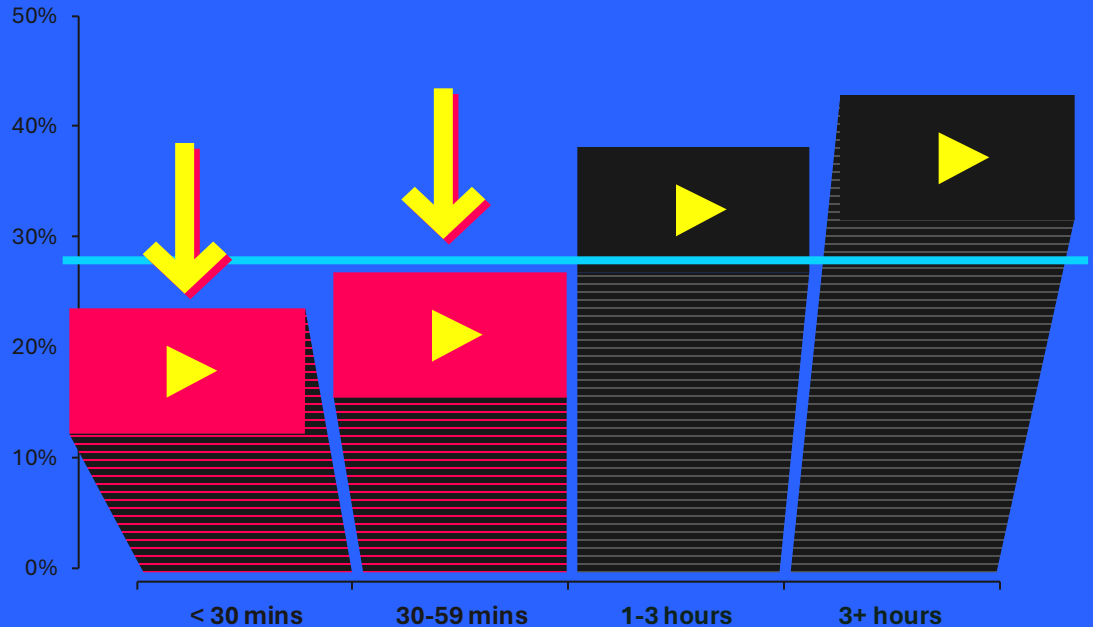
Significant difference at >90% confidence between "Less than 1 hour" and other groups

Gen Z attention drops with quickly repeating ads

To make the most of each ad exposure, ensure adequate frequency windowing

TVision Performance Metrics, 2H 2022 | N (Ad Airings): Average - 39,197; < 30 Mins - 2,838; 30-59 Mins - 176; 1-3 Hours - 143; 3+ hours - 114
Data includes 2 - 5 ads
Visual Ad Attention Rate: % of ads that received 2+ cumulative seconds of visual attention

Visual Ad Attention by Repeating CTV Ads - Gen Z



Time Difference Between Exposure to Same Ad



Visual Attention Rate

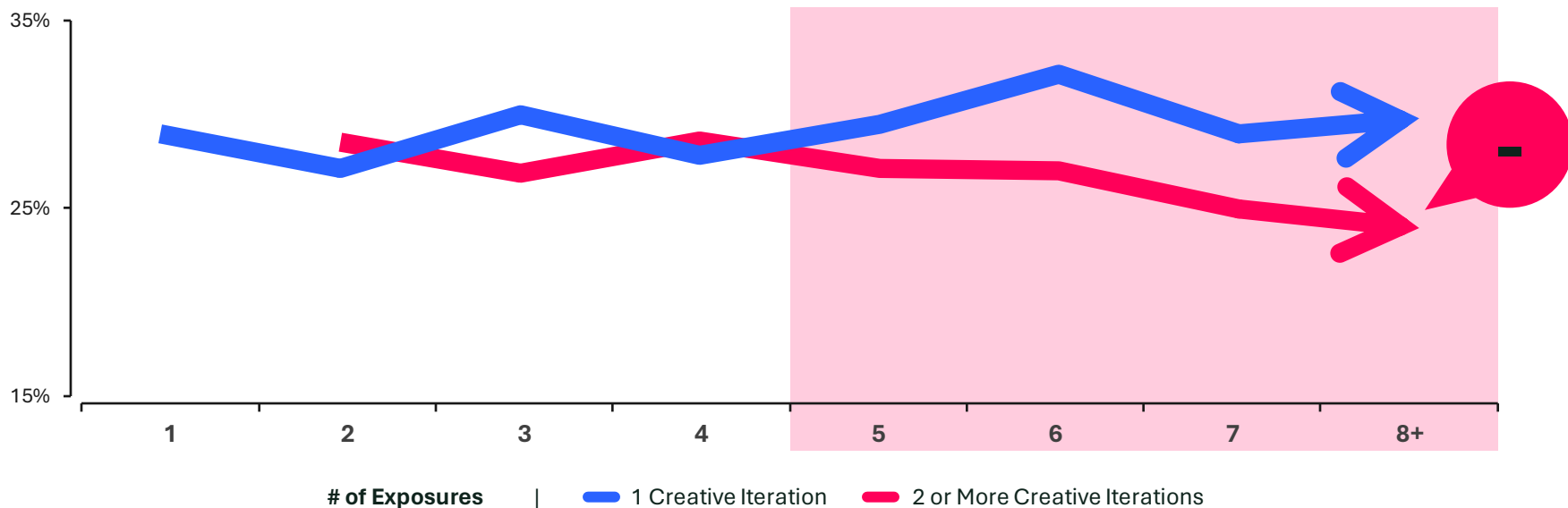


Avg. Visual Attention Rate

Consider fewer creative iterations for Gen Z

Consistency in creative is effective at grabbing the attention of Gen Z

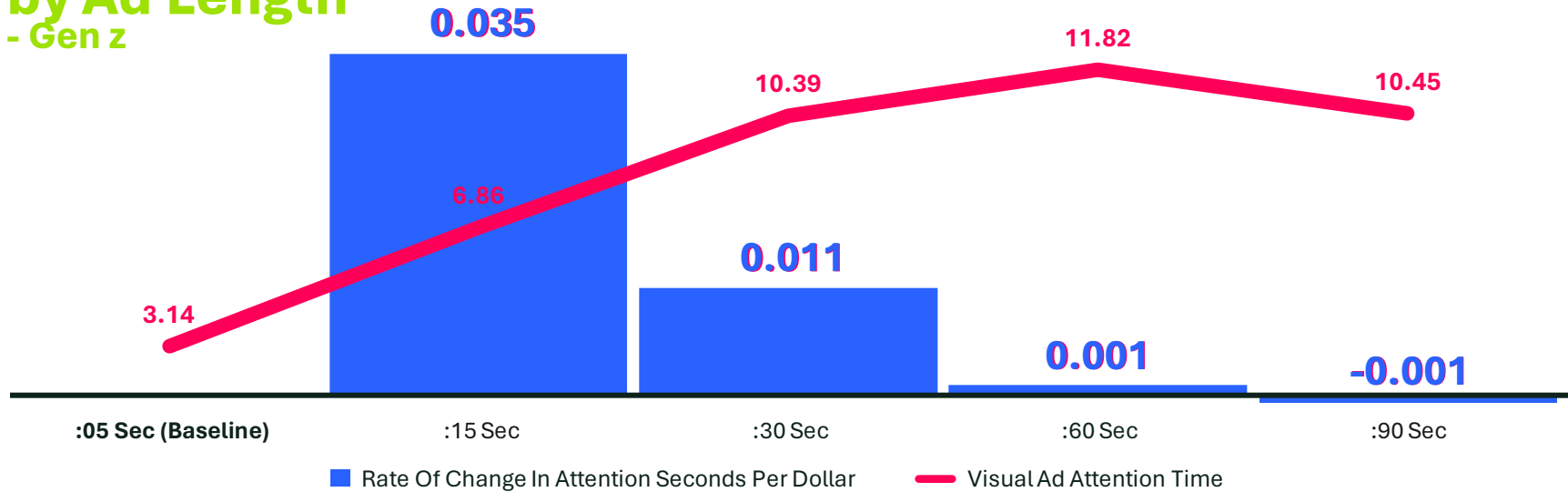
Visual Ad Attention Rate by # of Creative Iterations - Gen Z



Shorter ads are recommended for Gen Z, with :15 secs being the sweet spot

While longer ads have a greater chance for attention, the attention gained per dollar is highest for 15 second ads


Cost Efficiency for Attention by Ad Length - Gen z



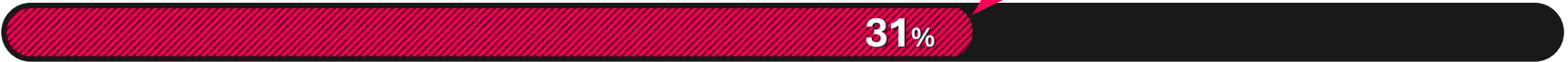
Gen Z pays more attention to ads on FAST channels

Visual Ad Attention Rate by Channel Type - Gen Z

Gen Z Prefers Fast Channels



FAST Channels



Non-FAST Channels

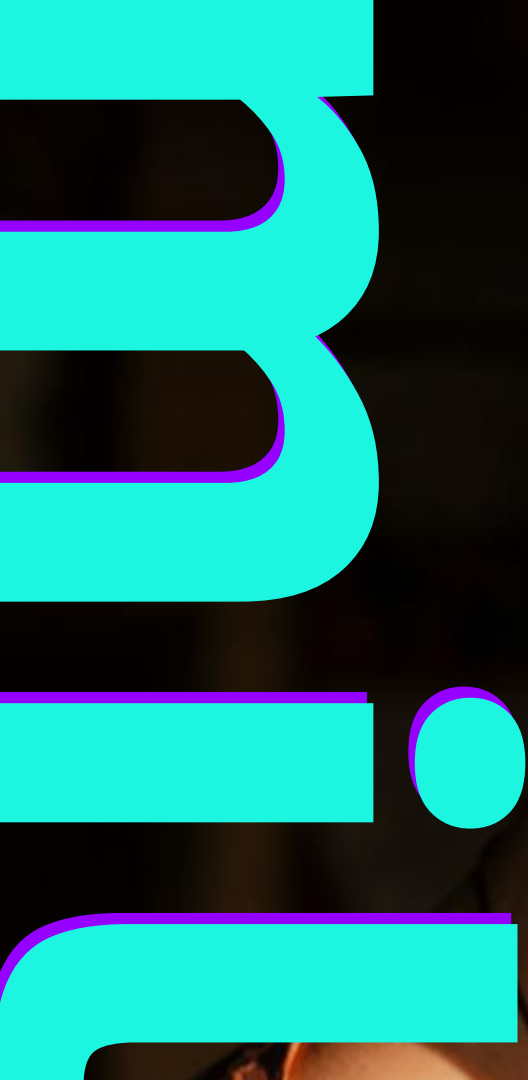


0%

25%

50%

TVision Performance Metrics, 2H 2022 | N (Ad Airings): FAST – 1,608; Non-FAST – 39,686
Visual Ad Attention Rate: % of ads that received 2+ cumulative seconds of visual attention
FAST: Free ad-supported, streaming TV
Significant difference at >90% confidence between groups



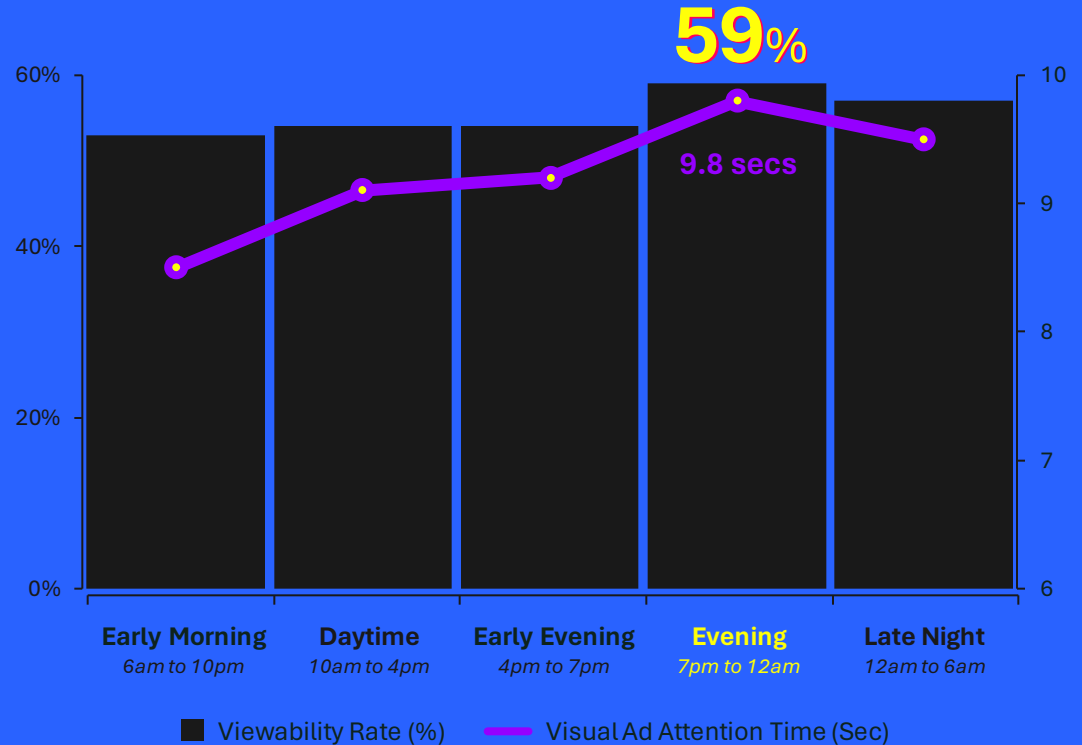
millennial

What advertisers need to
know about capturing
attention on CTV

For Millennials, primetime is 'prime time'

Viewability and ad attention peak in the evening for Millennials

CTV Viewing by Daypart - Millennials



TVision Performance Metrics, 2H 2022 | N (Ad Airings): Early Morning – 22,384; Daytime – 35,056; Early Evening – 49,724; Evening – 129,075; Late Night – 592,515
Viewability Rate: % of ads in which a viewer was in the room for 2+ cumulative seconds
Significant difference at >90% confidence between groups

Millennials are more attentive in shorter CTV viewing sessions

By Content Type

- #1 UGC*, 61%
- #2 Short Video, 57%
- #3 Movies, 55%
- #4 TV Shows, 52%

Ad Receptivity by Duration of Viewing Session - Millennials

A couple hours

46%

About 1 hour

48%

Less than 1 Hour

62%

Media Diary | N = 272

Q Overall, how much do you agree or disagree with the following statements about the ads that appeared during your session? - I was open to seeing ads at the time

Q What types of videos did you watch during your session?

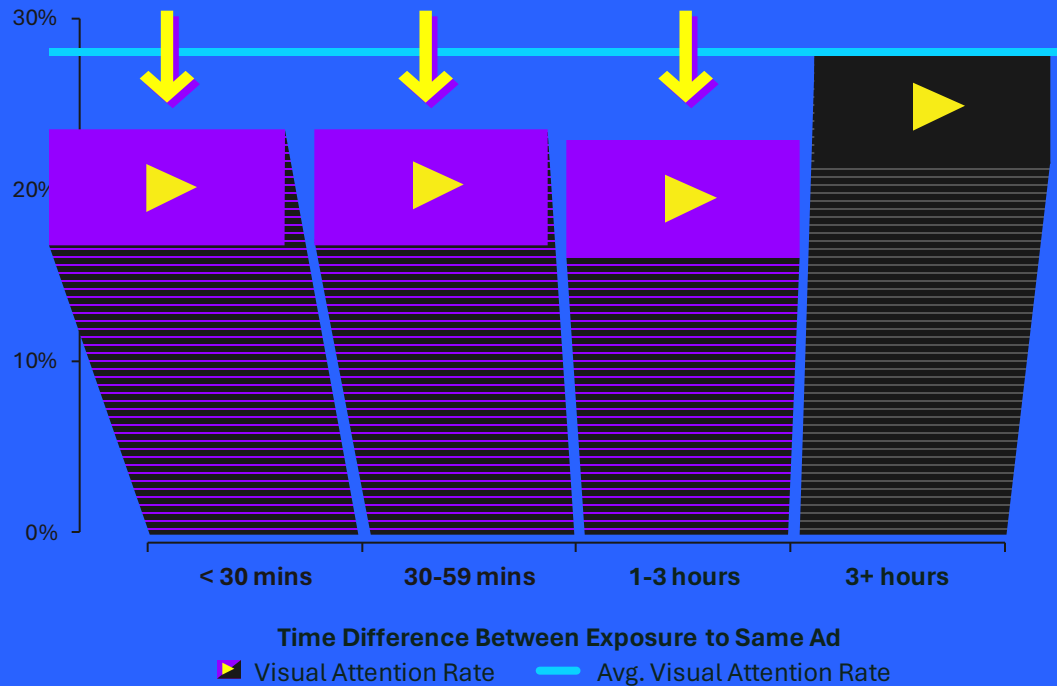
*UGC: Content created by people (e.g., DIY videos, unboxing videos, movie reviews, etc.)

Significant difference at >90% confidence between "Less than 1 Hour" and other groups

Frequency windowing even more important for Millennials than Gen Z

To maximize attention, ads should be delivered at least 3 or more hours apart

Visual Ad Attention by Repeating CTV Ads - Millennials

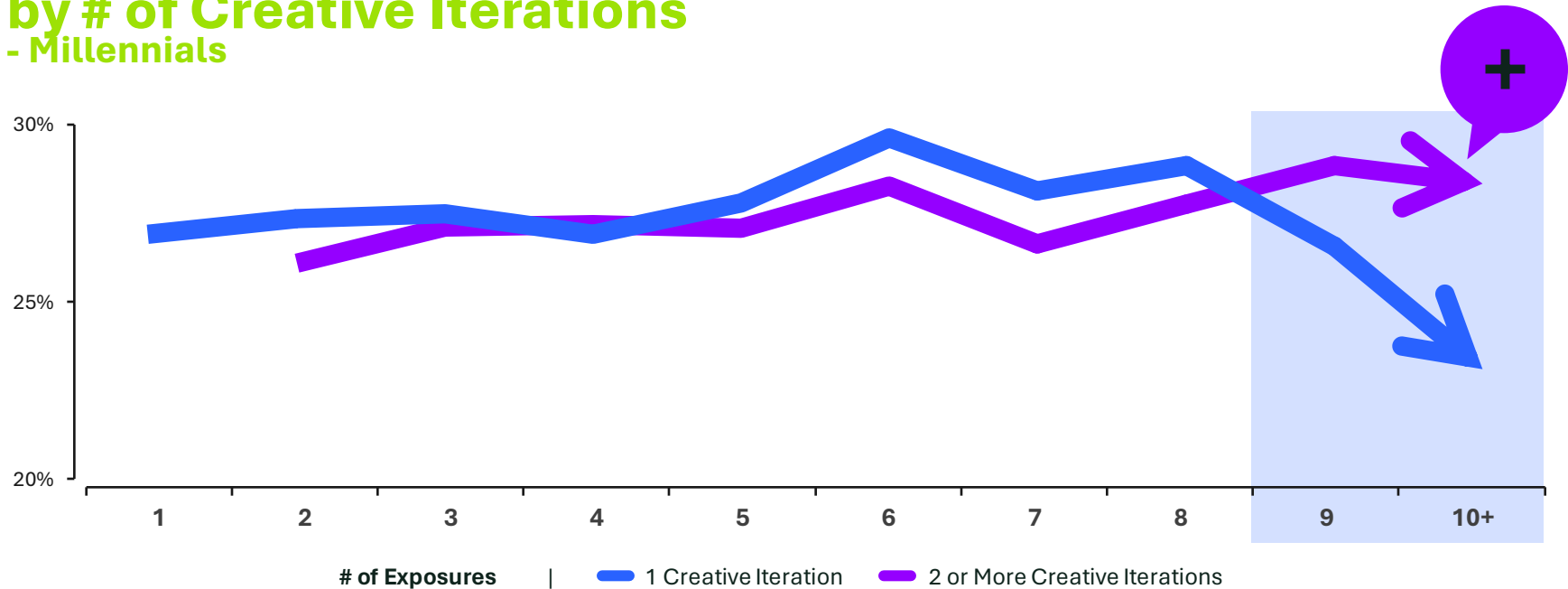


TVision Performance Metrics, 2H 2022 | N (Ad Airings): Average - 274,742; < 30 Mins - 20,106; 30-59 Mins - 1,282; 1-3 Hours - 740; 3+ hours - 669

Visual Ad Attention Rate: % of ads that received 2+ cumulative seconds of visual attention

Multiple creative executions recommended for Millennials at high frequency levels

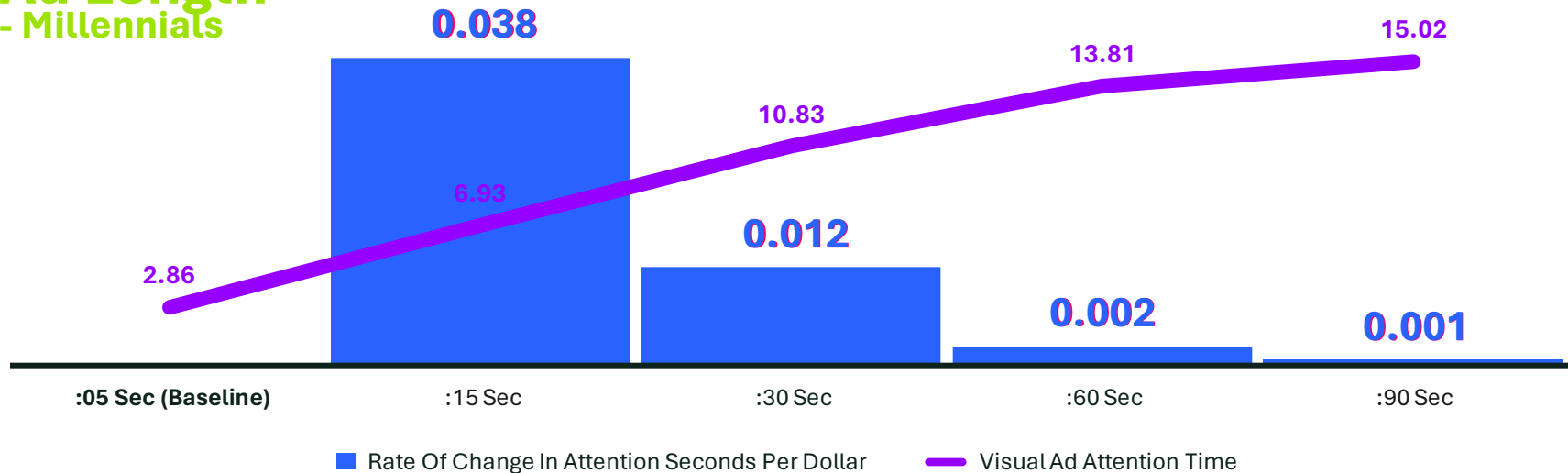
Visual Ad Attention by # of Creative Iterations - Millennials



:15 sec ads also provide biggest bang for the buck for Millennials

Higher attention for longer ads, but when marketers pay by length, shorter ads may be more cost efficient for attention

Cost Efficiency for Attention by Ad Length - Millennials



summary

Marketer's Guide

	GEN Z	MILLENNIALS
DAYPART	Explore untapped dayparts such as daytime & late night	Primetime is worth a premium
CONTENT	Invest in longer form content and FAST channels	Allocate more impressions to shorter form content
FREQUENCY	Ensure proper frequency management to avoid repeating ads	Millennials are especially avoidant of repeating ads , so proper frequency management is critical
# OF CREATIVE	Consider sticking with fewer creative iterations	Multiple creative needed at higher frequencies (9+ exposures)
AD LENGTH	When paying by ad length, 15 seconds offer the biggest bang for the buck for attention	

thank
you

SAMSUNG Ads

M/GNA MEDIA TRIALS