TVISION & MEDIAHUB

The 2022 Upfront Planning Guide

What Advertisers Need to Know This Season

February 2022



MEDIAHUB

Get in Front of This Year's Upfront

Looking back at 2021, one thing is clear: the TV industry has fundamentally transformed. Despite ongoing pandemic-related challenges, the major content owners and producers found new ways to meet the demand for at-home entertainment—resulting in higher quality programming across a wider array of apps, networks, screens, and channels.

It was another record-breaking year for CTV, but that doesn't mean that viewing behaviors are locked in stone. Streaming TV audiences, who leaned into commercial-free viewing initially, now spend more time streaming ad-supported video-on-demand than ad-free subscription services. Even so, linear television still captures more viewing time and a significantly greater share of ad dollars.

Perhaps one of the biggest transformations over the past year was in how we're able to measure and value TV. Between Nielsen losing its Media Ratings Council Accreditation and alternative data-driven currencies emerging from companies like VideoAmp and iSpot, the market seems poised to finally adopt more sophisticated and meaningful metrics for evaluating TV ad time.

How we buy and sell TV ads has transformed with the times as well. The digital distribution of TV combined with the democratization of available audience data has unlocked greater TV addressability and audience first buying tactics at scale. Yes, the TV ad industry has learned a lot from digital and proved there are multiple ways to transact effectively. But we know TV is different and the consumer experience is valuable regardless of delivery method or buying tactic. This leads us to question; is there a critical factor we're missing when we evaluate the explosion of new TV ad opportunities and ways to transact?

These changes mean Upfront planning is more complex than ever with questions abound:

- How many and how often are viewers truly exposed to my ads across TV platforms?
- How can marketers make apples-to-apples comparisons of TV opportunities across linear and CTV?
- Which TV platforms, dayparts, networks, and programming provide the most effective ad opportunities?
- Is there room for multiple currencies? Ones that may be applied across the bulk of my media plan?
- Which metrics matter most when evaluating media performance? Is there a leading indicator we may focus on?

Attention metrics can help answer these questions.

In this report, we've compiled eight must-know insights and tips for how to tackle this year's Upfront using Attention as a reliable metric for cross-media valuation and measurement. By making smart investments that factor in audience Attention, advertisers can ensure their budgets deliver more value than ever before.



Michael Piner

EVP, Advanced Media
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1 Pay Attention to Attention

Attention's star has been on the rise. In the last year alone, attention measurement took center stage during **ARF's annual Audience x Science Conference**, and recent studies by **The Attention Council** as well as **Ebiquity, Lumen**, and TVision championed Attention as a critical metric for driving meaningful results across the marketing & sales funnel and cutting across media. This section will dive deeper into what Attention means and how brands can wield it to make the most of their upfront plans.

What is TV Attention?

To start, let's define Attention. TVision reports Attention by measuring the amount of time that viewers were engaged with the ads, with their eyes on the TV screen. Attention metrics require the viewer to have had their eyes on the screen for two or more seconds. In a world where 88% of people are multitasking while watching TV according to the most recent **Bond Internet Trends Report**, getting and keeping consumer attention should be a priority for any advertiser.

It's important to note that TVision also reports on Viewability, which measures how effectively viewers are kept in the room while ads are on-screen. While advertisers can influence Attention through savvy media planning and strong creative, networks have more sway over Viewability. In addition to Attention, Viewability is an important metric for marketers to consider in their plans.

2021 Overall TV Averages

VIEWABILITY

71%

(Individuals in the room)

ATTENTION

37%

(Individuals in the room with eyes on the screen)

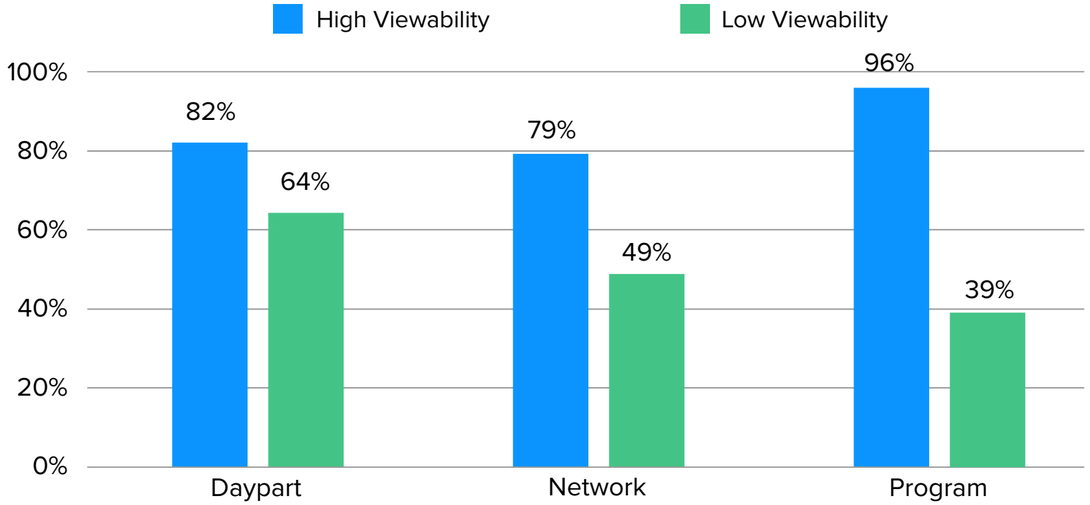
Source: TVision Panel 2021

Finding your Best Opportunities to Drive Attention

Our data shows that Attention varies dramatically across dayparts, networks, and programming. In fact, there are programs across all dayparts that deliver higher Attention, and usually at lower costs, than some Primetime spots.

In this chart, we illustrate the significant variances between high and low Viewability and Attention media. When evaluating media opportunities, marketers may first want to consider Viewability. When looking at Viewability, the difference between placements is quite pronounced across the board. For example, some programs keep viewers in the room for as much as 96% of all ad impressions or as little as 39%.

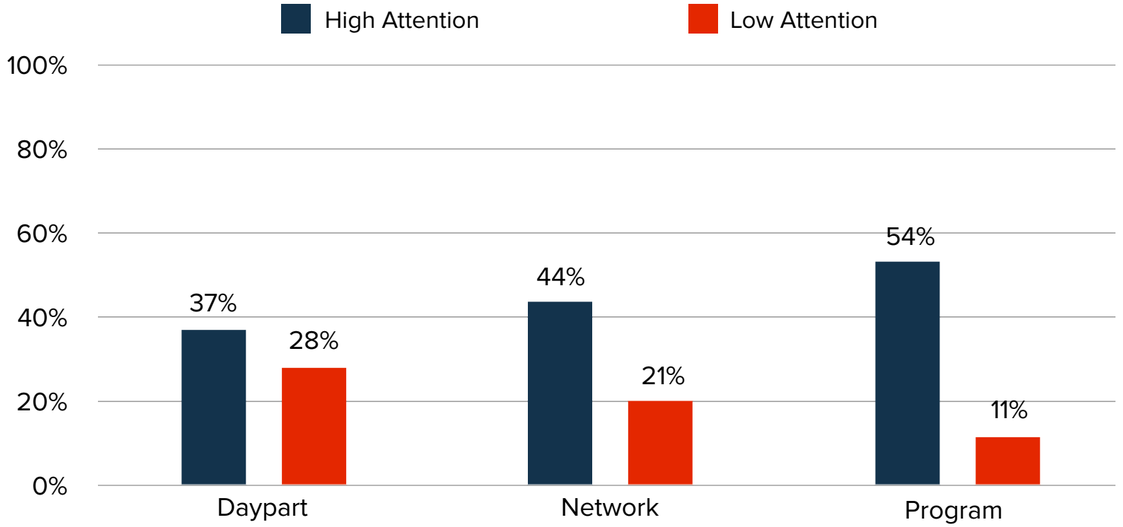
Viewability Across Daypart, Network, and Program



Source: TVision Panel 2021 | Viewers Ages 18-49 | 1,000 Observations for Programs

Next, assuming that the media is viewable, it's important to look at how effectively these placements keep viewers' eyes on the screen. Here, we see a nearly 5x difference in Attention with the highest performing program at 54% Attention and the lowest at 11%.

Attention Across Daypart, Network, and Program



Source: TVision Panel 2021 | Viewers Ages 18-49

Note, there is not necessarily a correlation between Viewability and Attention. Yes, a person would need to be in the room to be attentive, but a low Viewability program may still deliver high Attention. Remember, Attention is dependent on the impression being viewable, and is meant to measure, of the viewable impressions, how much attention the audience paid.

Savvy marketers can use Attention and Viewability data in their Upfront planning & negotiations to more accurately value media opportunities and ensure they're directing budgets to impressions where their ads may actually be seen by people in the room.

Attention Ultimately Depends on Both Creative & Media

It's worth noting that Attention is a metric that stitches together the impact of both creative and media. Great ads may intrinsically do a better job at driving Attention, but since we know placement plays a role in viewer Attention, will they perform even better in high-Attention media? On the flip side, do highly attentive ad placements improve the performance of poor creative?

Our recent **study with RealEyes** helps to answer these questions. We analyzed how creative and media placements work together to drive ad Attention, and how marketers should change to maximize the efficiency of their media plan when they have either great or poor creative.

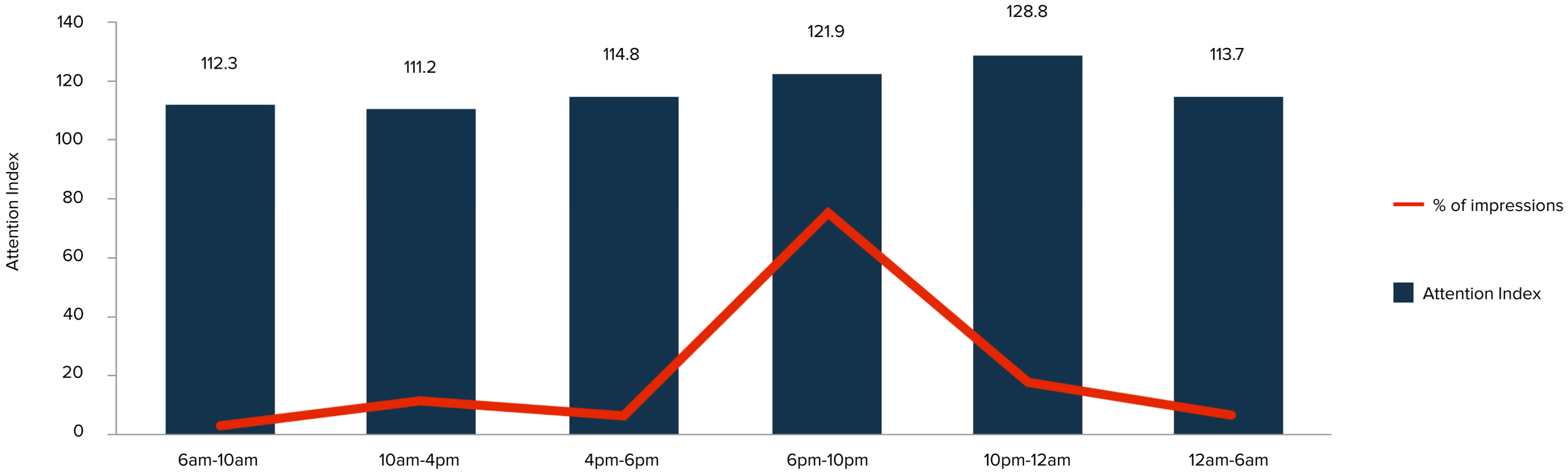
On the the next page, we've included a case study to illustrate how media placement can be just as powerful as stellar creative.



Samsung Case Study:
Optimizing for Attention Makes Low-Scoring Creative Outperform

In this example, a Samsung creative only received 4 out of 10 for the Realeyes' pre-campaign Quality Score, indicating it may have a below-average ability to capture Attention. However, TVision's data showed that once the ad ran, it performed better than most ads. So why the discrepancy between pre-campaign testing and real-world results?

In Samsung's case, it all came down to smart media planning. Samsung ran their ad in high-Attention programs, dayparts, and at an optimal frequency. Over the course of their campaign, the ad was able to capture attention 42% of the time and was viewable by 75% of audiences – both metrics above the industry average.



Source: TVision Panel | P2+ | Samsung - Galaxy S21 Galaxy S21 | S21+ Official Film: The Trip | Samsung: 30: 21-02-21 0802 | Normal Sample >=30

Attention Drives Real Results

Whether you're entering the Upfront season with a smaller budget than anticipated, or with plans to aggressively increase your presence on linear and CTV, incorporating Attention metrics into your planning process can dramatically improve the efficiency and impact of campaigns.

Case Study:
Ad budgets go 3x as far with Attention data

Brands that focus their campaigns on high-Attention media can achieve the same level of brand awareness with significantly fewer GRPs as compared to low-Attention media opportunities.

Let's take a look at how many GRPs are required to reach 40% brand awareness.

A campaign that reports low Attention will require 2200 GRPs, but the same ad campaign, optimized to run in high-Attention programming is much more efficient—reaching the same 40% brand recall at just 600 GRPs. Assuming a similar cost per GRP for high- and low-Attention media, this means an **advertiser needs to spend 3.7 times as much on low-Attention media** in order to achieve the same results.

How Many GRPs Do You Have to Buy for 40% Brand Awareness?

600

GRPs of Ads with High Attention

VS.

2,200

GRPs of Ads with Low Attention

Case Study:
Attention Correlates to In-Store Visits

Attention provides a reliable metric for gauging in-store visits. One of the nation's largest fast-food chains wanted to know if viewers who pay close attention to their TV ads are likely to dine at their restaurant.

TVision compared TV attention, as measured by our Creative Attention Score, to the brand's on-premise visits.

4x **Attention was 4x more predictive of store visitation than traditional TV exposure measures.**



2 Not All Impressions Are Equal

We all know even the best TV ads are sometimes shown to audiences who are simply not paying attention. To date, the industry has solved this intuitively—for example paying premium CPMs for Primetime when audiences are less likely to be distracted. But these simple proxies don't reflect the real-world nuance of audience attention—causing ad impressions to be under—or over-valued.

As discussed in the previous section, Attention can vary significantly depending on the program, daypart, network, and more. Advertisers looking for some surefire programs to grab attention next year, should consider programming similar to these primetime shows that captured the most Attention in all of 2021 across broadcast and cable.

The Top Five Primetime Broadcast Shows of 2021 for Ad Attention

	SHOW	AD ATTENTION
1.	young Sheldon	47.0%
2.	World's Funniest Animals	46.7%
3.	B POSITIVE	46.6%
4.	Charmed	45.7%
5.	Mom	45.7%

The Top Five Primetime Cable Shows of 2021 for Ad Attention

	SHOW	AD ATTENTION
1.	BRINGING UP BATES	54.3%
2.	RACE TO THE CENTER OF THE EARTH	53.8%
3.	IRON RESURRECTION	53.4%
4.	MEERKAT MANOR RISE OF THE DYNASTY	53.3%
5.	Rick and Morty	52.6%

For those considering which CTV opportunities to prioritize during Upfront, here are the top apps for Ad Attention and programs for Co-Viewing—a multiple that can help marketers and platforms better value their CTV ad inventory.

The Top Five CTV Apps for Ad Attention in 2021

	APP	AD ATTENTION
1.	DIRECTV stream	42.2%
2.	xfinity	40.4%
3.	hulu	36.1%
4.	peacock	36.0%
5.	fuboTV	34.8%

The Top Five AVOD Programs for Co-Viewing in 2021

	PROGRAM NAME	CO-VIEWING RATE
1.	90 DAY Fiancé BEFORE THE 90 DAYS "Discovery+"	64.0%
2.	HIGH FIDELITY "Hulu"	62.0%
3.	The Laundry Guy "Discovery+"	62.0%
4.	nickelodeon KAMP KORAL SPONGEBOB'S UNDER YEARS "Paramount+"	62.0%
5.	A.P. BIO "Peacock"	61.0%

Do Top-Rated TV Shows Get High Engagement?

Ratings have long served as the primary currency during the Upfront. But ratings only tell part of the story. In today's distracted environment, ratings alone don't mean people are in the room, paying attention. By layering TVision's person-level engagement data on top of ratings, advertisers can find shows that truly deliver on the promise of a large and engaged audience.

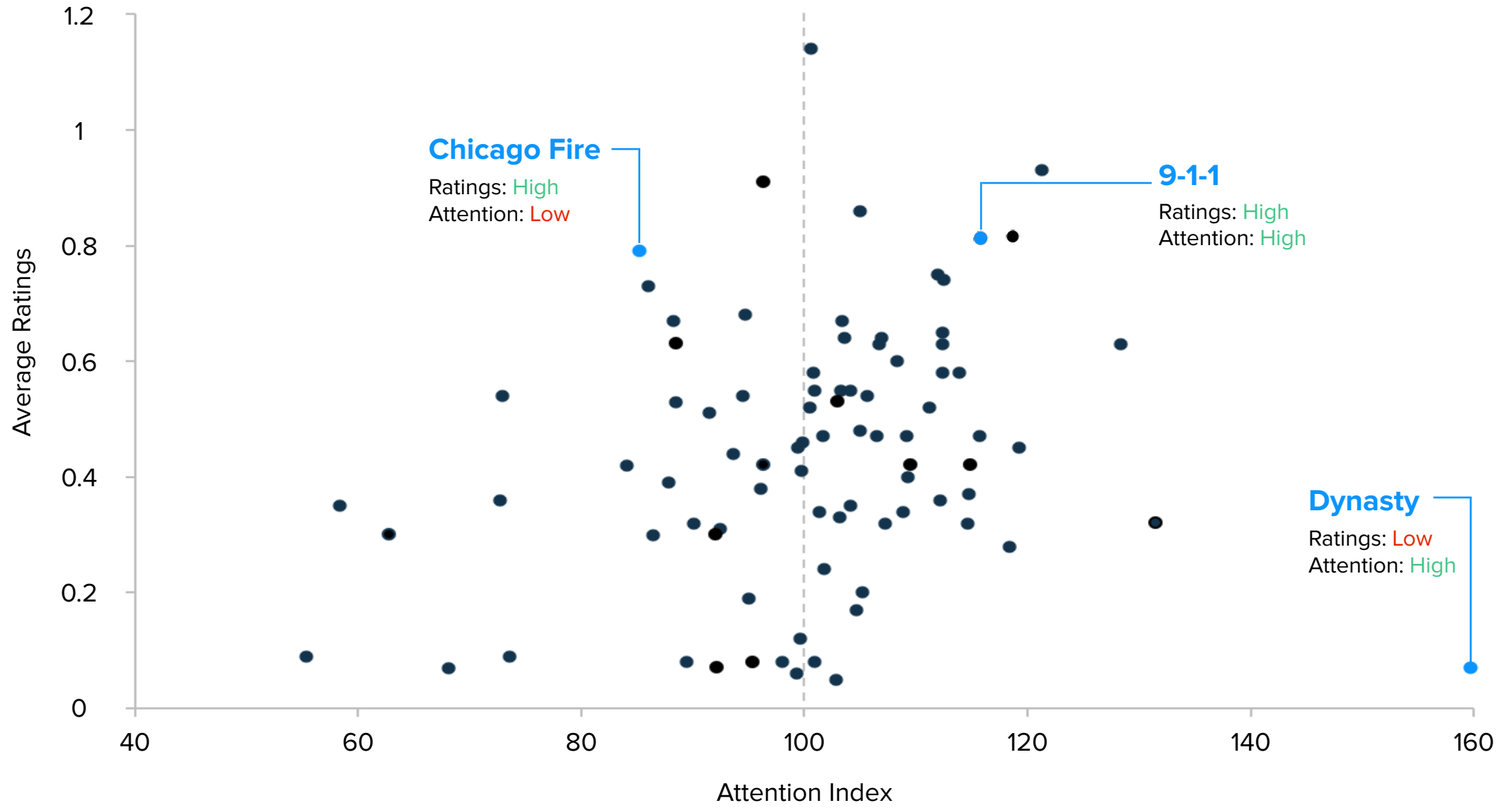
On the next page, we've taken the shows with the **highest average ratings so far in the 2021-2022 season by viewership** and plotted them against our Attention Index. While shows toward the top of the chart score high in terms of ratings, those that also fall to the right of our Attention Index average are marketers' best bets--keeping viewers' eyes on the screen during commercial breaks.

Savvy marketers can use Attention data in their Upfront planning and negotiations to more accurately value media opportunities and ensure they direct budgets to impressions where their ads may actually be seen by people in the room.



Ratings Do Not Equal Attention

Average Ratings for Top TV Shows vs. Attention



TVision Panel Sep – Dec 2022, Average Nielsen Ratings for 2021-2022 Season (18-49 Demo)

FOX's *9-1-1* and *Chicago Fire* both draw in large audiences and garner high ratings, but *9-1-1* is more likely to keep audiences engaged. Lower-rated shows with high Attention may also be worth a second look. The CW's *Dynasty* indexes among the highest for Attention despite comparatively modest ratings, providing a potentially lower-cost opportunity to reach a smaller, yet highly engaged audience.

Get Complimentary Upfront Recommendations

TVision is offering free 1:1 planning workshops to help you maximize the impact of your Upfront. Marketers will receive a custom Upfront diagnostic and action plan, including a preview of their top five opportunities for Attention. **Sign up today** to claim your spot.

What Does the Rise of CTV Mean for Linear?

While streaming television gets a lot of the industry buzz, traditional linear television viewing still represents the majority of all TV watching in the United States. Linear advertising also typically secures higher levels of Attention and Viewability than CTV averages.

This is likely due to several contributing factors. For instance, CTV viewers may be less accustomed to watching ads or they're seeing the same ads on repeat due to ad over-saturation on CTV platforms. However, it's worth noting that viewers are more likely to be watching CTV content with friends and family. CTV typically sees higher co-viewing averages than linear. We'll dive in more to the CTV opportunity later in this report.

Linear vs. CTV Ad Engagement



Ad Attention

Linear: **37%**
CTV: **31%**



Ad Viewability

Linear: **71%**
CTV: **60%**



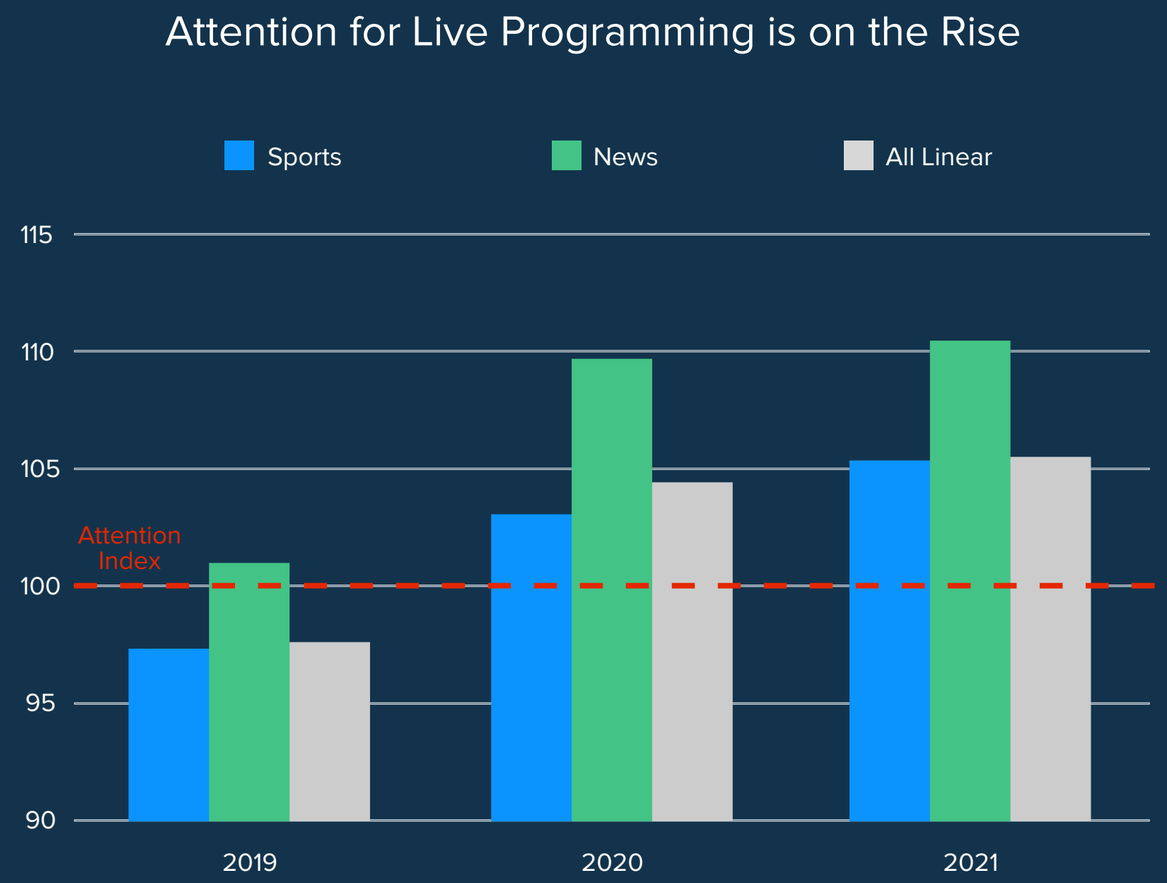
VPVH

Linear: **1.26**
CTV: **1.29**

3 Find the Most Engaged Live TV Viewers

Live television has historically been a significant part of the Upfront, and all signs indicate that 2022 will be no exception. Since the start of the pandemic, Attention and Viewability are both generally increasing across linear TV. This includes Attention for two of the most important live categories—Sports and News.

For buyers who want to make the most of this growing opportunity during this year's Upfront, it is important to fully understand where, how, and when to engage their audiences. TVision's Attention data can help brands evaluate which live TV media investments pack the biggest punch for engagement.



LIVE SPORTS

Which Sport Has the Most Engaged Fans?

The NFL may have some of the largest audiences, but when it comes to Attention, baseball has some of the most dedicated fans. Major League Baseball captures the most engagement among major sports programming, followed by College Baseball--both scoring higher than NFL Football. Note that College Baseball and the WNBA have the smallest audiences among the five highest-Attention sports. However, these sports have highly engaged viewers and may provide brands with some more cost-effective opportunities to make an impact.

Top Five Sports Programs by Attention

		Attention Index
1.	MLB Baseball	105.7
2.	College Baseball	103.8
3.	NFL Football	102.0
4.	WNBA Basketball	101.7
5.	College Football	101.1

How to Maximize Major Sporting Events for Engagement

Each year, advertisers spend millions and millions to have their ads air during the Super Bowl. And with good reason. Even with sports viewership down in the wake of the pandemic, major NFL events continue to index well above average for viewer Attention. The big game, in particular, outpaces all other major sporting events. But remember: not all impressions are equal. On the next page, we'll review how Attention can vary significantly by game part during the Super Bowl.

Marketing Tip: Keep Score of Sports Viewers

1. Use engagement and ratings data to create a balanced mix of advertising across sports, including college and professional.

2. Track performance of your campaigns over the season and allocate or adjust spending to adapt to changing viewer behaviors, which teams are gaining an edge on the competition, and which have the most engaged fans.



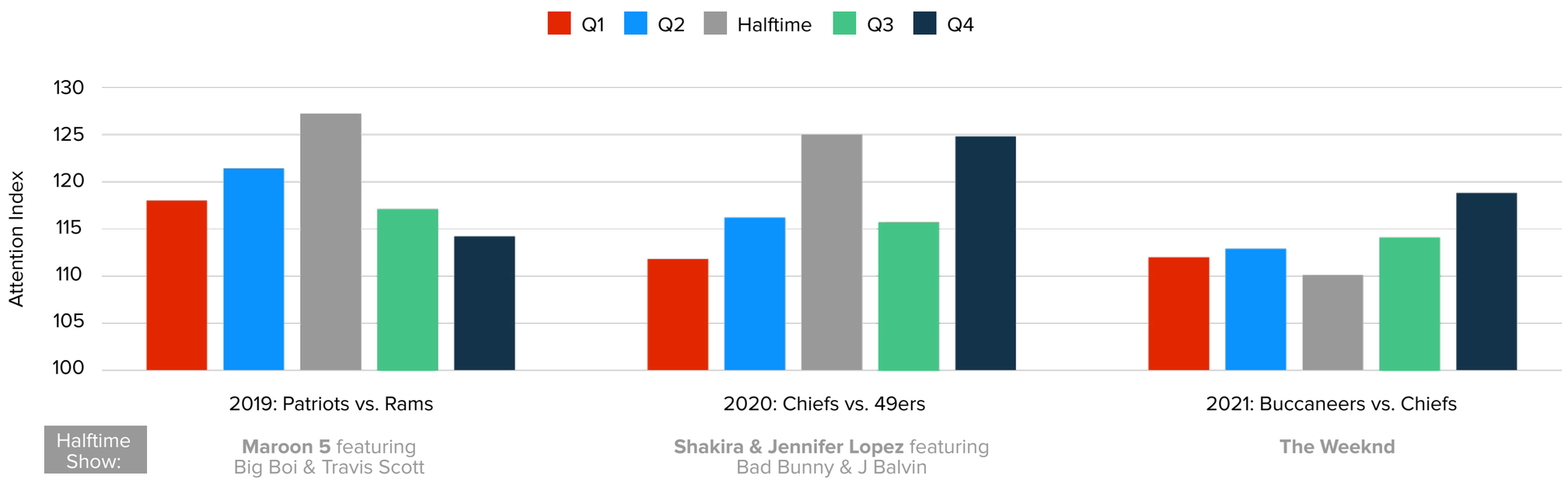
Top Five Major NFL Events in 2021 by Attention

		Attention Index
1.	Super Bowl	109.8
2.	Wildcard Weekend	106.4
3.	Season Kickoff	105.5
4.	Divisional Playoffs	105.1
5.	Conference Championship	104.2

As a general rule, the halftime show keeps viewers' eyes glued to the screen more consistently than the game itself--though this can change depending on the show's level of star power. For instance, last year's halftime show featuring the Weeknd with no special guests commanded less attention compared to previous star-studded years.

In terms of the game itself, the second quarter is typically a safe bet for Attention, while Attention in later quarters is more beholden to the score of the game. In 2019, Attention dropped off in the second half as the score remained stagnant. On the other hand, 2020's Super Bowl kept viewers on the edge of their seats in the fourth quarter as the Kansas City Chiefs rallied in the eleventh hour and won their first Super Bowl since 1970. To make the most of premium ad placements for major sporting events, advertisers can look to Attention to ensure their ad dollars are positioned to reach the most engaged audiences throughout the game.

Super Bowl Attention by Game Part

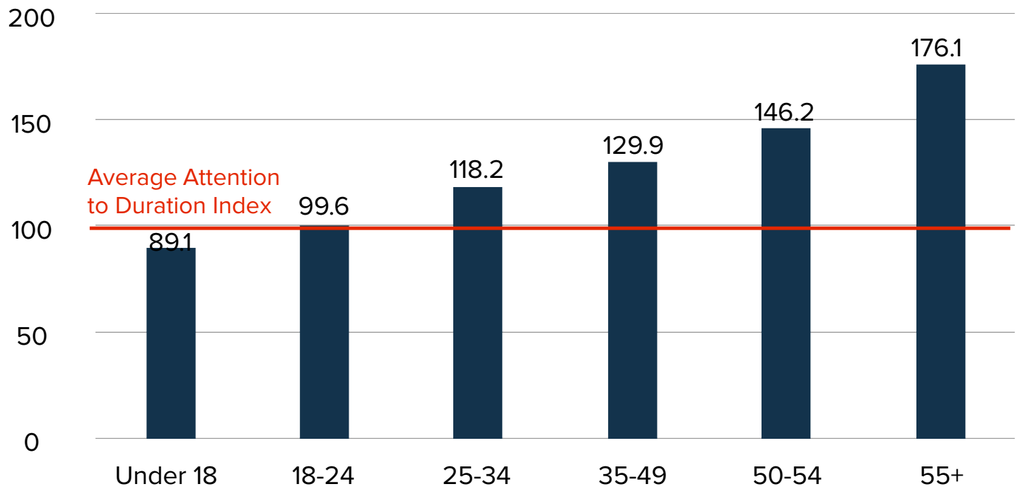


NEWS & REALITY TV

News Attention is on the Rise

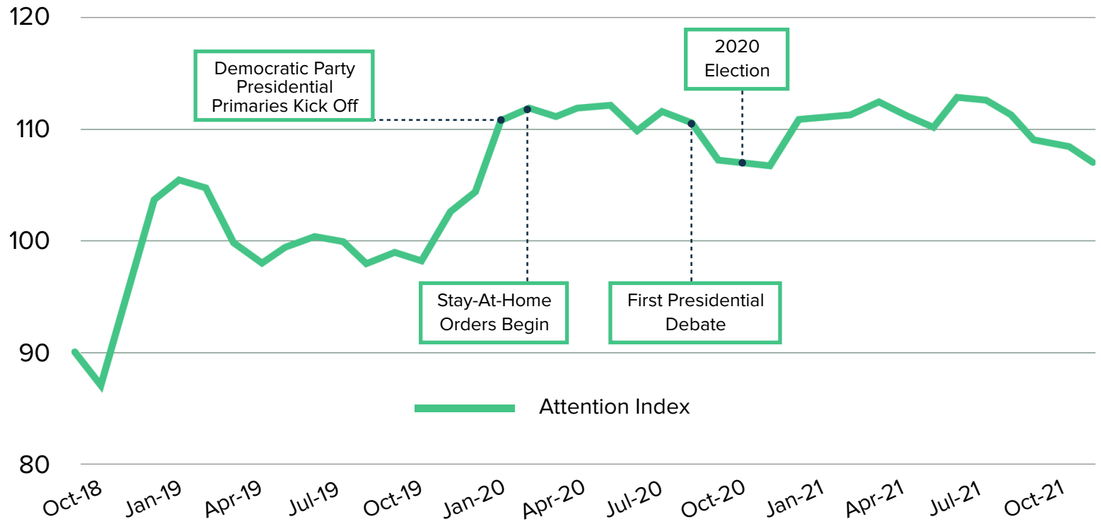
With the start of the pandemic and a presidential election year, time spent watching the news spiked in 2020 and remained high in 2021. Much of this engagement was driven by people age 35 and up, as attention paid to news programming in proportion to the total episode generally increases with age.

Older Demographics Pay MoreAttention to News Programs



With this year's midterm elections on the horizon and lingering uncertainty about the future of the pandemic, viewers have plenty of reason to keep their attention on the news. Although we're not in a presidential election cycle, marketers can look to the 2020 cycle to see when Attention is likely to be highest as we enter another election year with several critical seats up for grabs.

Attention to News Programming by Month

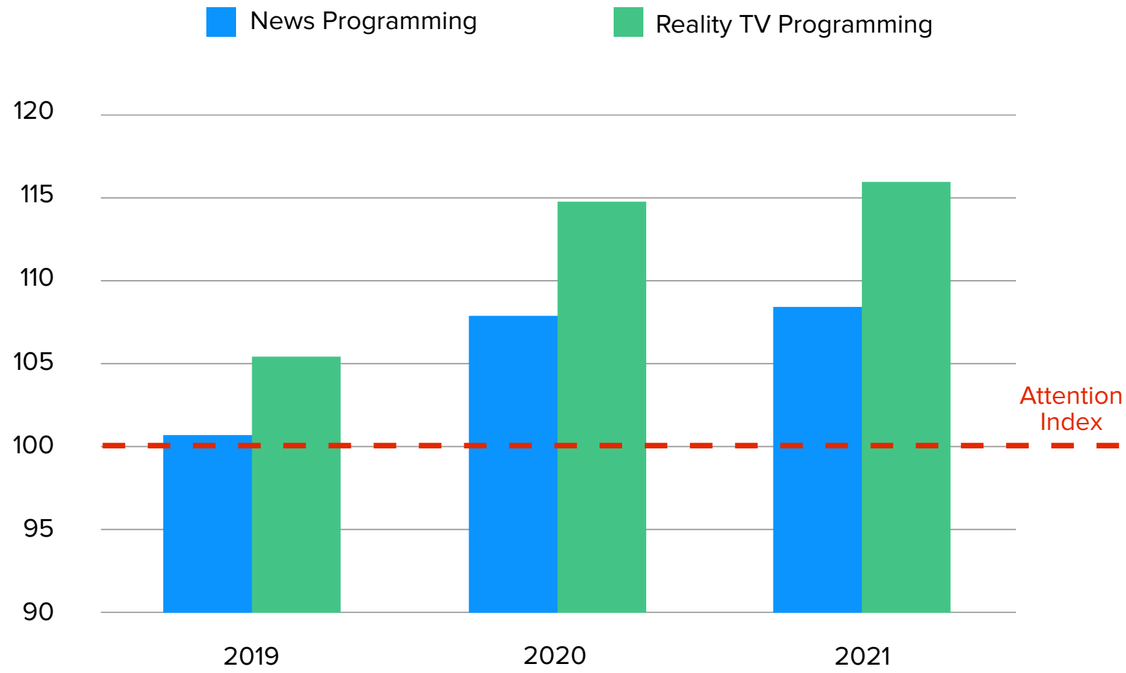


From late 2019 to early 2020, Attention quickly spiked as viewers tuned into pandemic coverage and the presidential primaries kicked off. Attention remained high through the presidential debates but decreased slightly in November and December as election excitement began to settle. For marketers looking to optimize their news spend during this year's upfront, the earlier you can get in front of viewers during the election cycle, the better.

Reality vs. “Reality”

Even as the national focus turned to the news, the pandemic also seems to have inspired viewers to escape into an alternate kind of reality. Reality TV shows consistently capture more attention than news programming and have also experienced a jump in Attention starting in 2020. However, it’s worth noting that news programming generally rates higher for Viewability metrics - indicating that news keeps viewers in the room more effectively even if they may be more distracted.

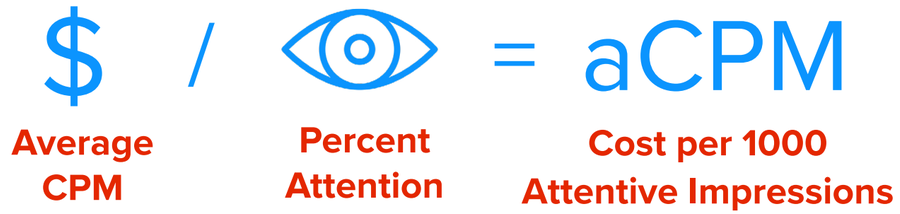
Do People Pay More Attention to News or Reality TV?



4 Use aCPM as a Cross-Media Metric

The industry has long sought an effective cross-media measurement tool that will empower buyers and sellers to effectively value inventory across all types of ad placements. Marketers looking to compare their true costs across media need look no further than Attentive CPM.

Attentive CPM (aCPM) combines the viewer's average Attention with the cost per thousand impressions of media. When brands optimize their campaigns for Attention, every incremental improvement translates to significant efficiency gains and greater value from their ad investments.



When Attention and Viewability data metrics are incorporated from the start, marketers can prioritize opportunities with lower aCPMs or Viewable CPMs v(CPMs). This strategy gives more weight to efficient, impactful impressions that deliver higher performance for the same money spent.

aCPM in Action: CPG Brand Maximizes Upfront Commitments

A major household cleaning brand wanted to maximize Attention from its fully committed Upfront advertising plan. They optimized their allocations using TVision's Linear Planning solution to identify the dayparts and programs that delivered the highest Ad Attention within each channel. One month after optimizing their plan, the brand:

RESULTS OF ONE-MONTH OPTIMIZATION

1. Increased their TV Ad Attention by 1%
2. Improved their attentive CPM across 80% of Network/Dayparts
3. Reallocated $510K of "wasted investment" (i.e. impressions served to non-attentive individuals) to more attentive media
4. Is on track to receive $3.7M worth of additional attentive impressions this year

The importance of this increased Attention cannot be understated. Remember from section 1: advertisers that optimize for Attention dramatically improve the efficiency of their campaigns and drive real results across the funnel.

Marketing Tip:
Calculate Your aCPM

Want to find your true cost of Attention and how it compares across different ad lengths and media? Instantly compare attentive CPM by media using our free **Attention Calculator** tool.

For tips to optimize for viewability, check out Trend 8 about how to leverage vCPM to guarantee ads are viewed by in-room audiences.



5 Understand the CTV Landscape

As CTV becomes a bigger part of the Upfront, Attention metrics can be especially helpful for marketers.

Want to know how engaged viewers are on Hulu versus NBC? How do you make sure you're not wasting ad dollars to reach the same audiences with the same inventory? Between legacy ratings services offering limited streaming metrics and CTV platforms each using their own unique metrics, these can be a challenging question for media planners to answer. TVision's CTV reporting makes it possible to make apples-to-apples comparisons across both Linear TV and CTV, achieve unduplicated reach, and gain much-needed transparency into CTV walled gardens.

In section 2, we outlined the top five CTV AVOD apps for Ad Attention (pictured on the right as a quick refresh). Here, we'll cover some additional metrics and tips & tricks to demystify the CTV landscape and make the most of this growing opportunity during Upfront planning.

The Top Five CTV Apps for Ad Attention in 2021

	APP	AD ATTENTION
1.	DIRECTV stream	42.2%
2.	xfinity	40.4%
3.	hulu	36.1%
4.	peacock	36.0%
5.	fuboTV	34.8%

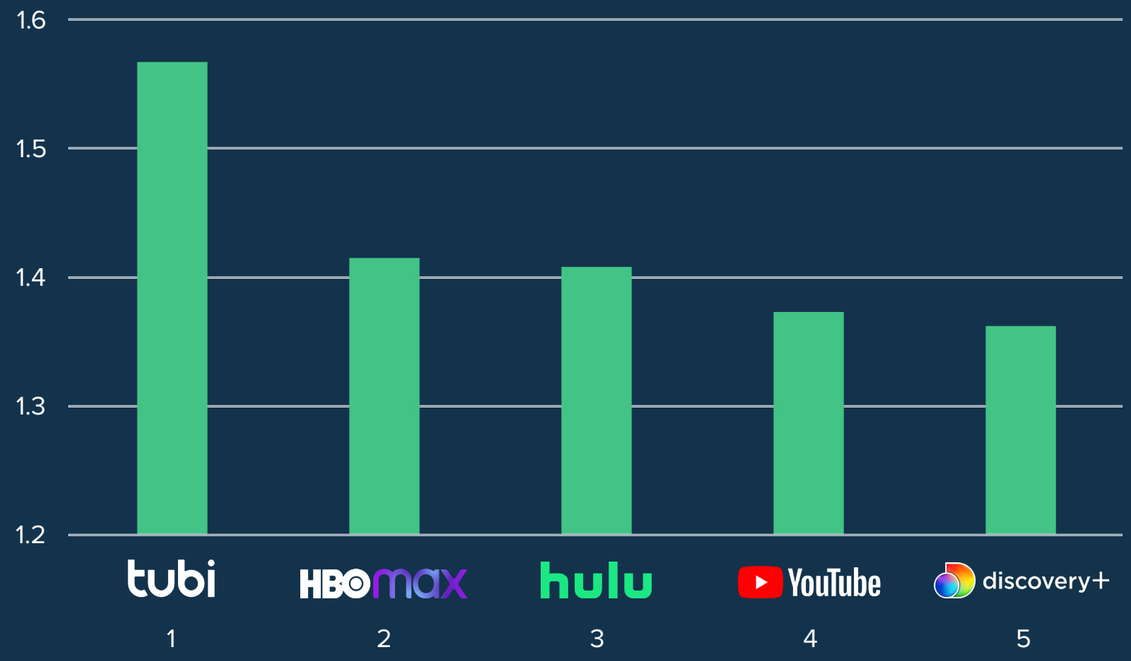
Who is in the Room?

For effective Upfront media planning, marketers need to know definitively how many people are in the room, who they are, and who among them is paying attention.

As we discussed in section 2, accurate co-viewing metrics are critical for understanding the real reach of CTV programming. Co-viewing rates provide a crucial distinction between household and person-level viewing and also serve as a multiple that can help both marketers and platforms better value their CTV ad inventory.

Here were the top ad-supported CTV apps for VPVH in the second half of 2021.

Viewers Per Viewing Household on Ad-Supported CTV Apps



Source: TVision Panel, Jun-Dec 2021

Cord Nevers Are Younger and Watch TV on Fewer Apps

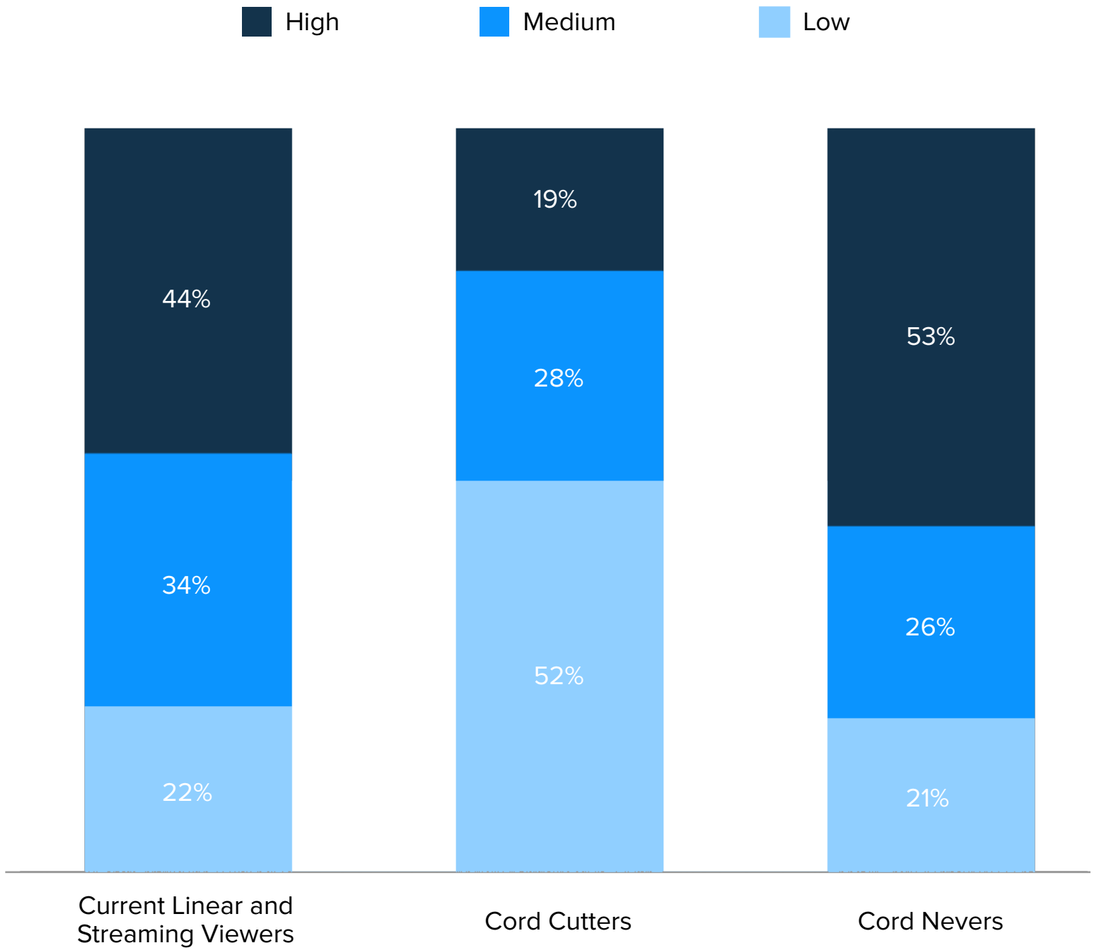
It's a common myth that Gen Z exclusively watches CTV content, while older viewers only watch linear. The truth is most television viewers continue to consume both linear and streaming television.

However, since many marketers are moving budget to CTV in hopes of finding audiences they simply can't reach on linear television, TVision has begun tracking a group of viewers known as "cord nevers" - viewers who do not have a history of watching linear TV, and "cord cutters" - viewers who watched linear more than 6 months ago, but not since.

Cord nevers only make up 2% of all time spent watching television but tend to skew younger than the average TV viewer and watch fewer apps overall.

52% of cord-cutters are also low-volume TV viewers, which might explain why they spend significantly more time watching ad-supported apps vs. paid TV services.

Percent of High, Medium and Low Volume Viewers



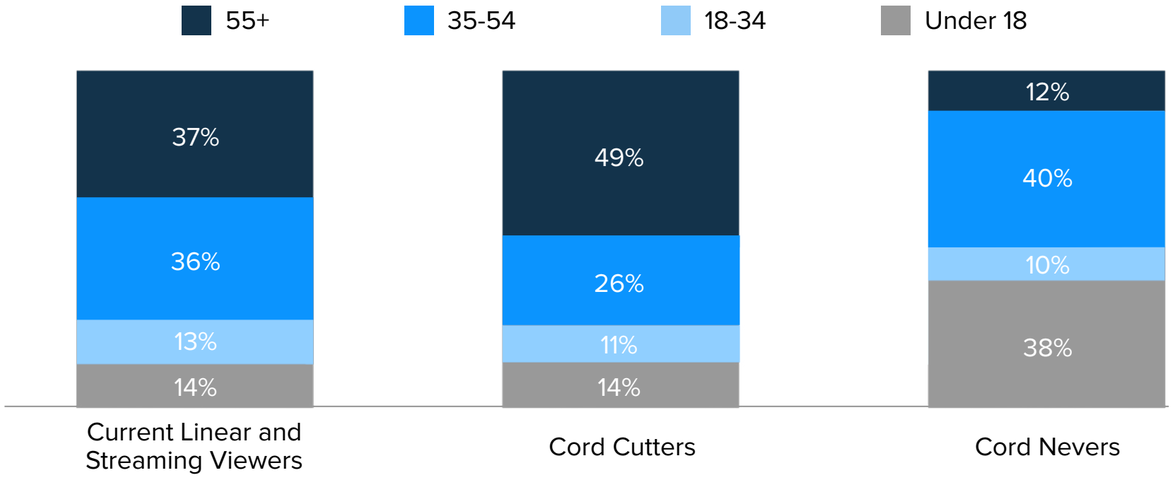
Who Are Cord Cutters and Cord Nevers?

As we mentioned above, CTV programming is being rapidly adopted by all demographic groups, not just the youngest generation. This chart helps illustrate the demographics of each group.

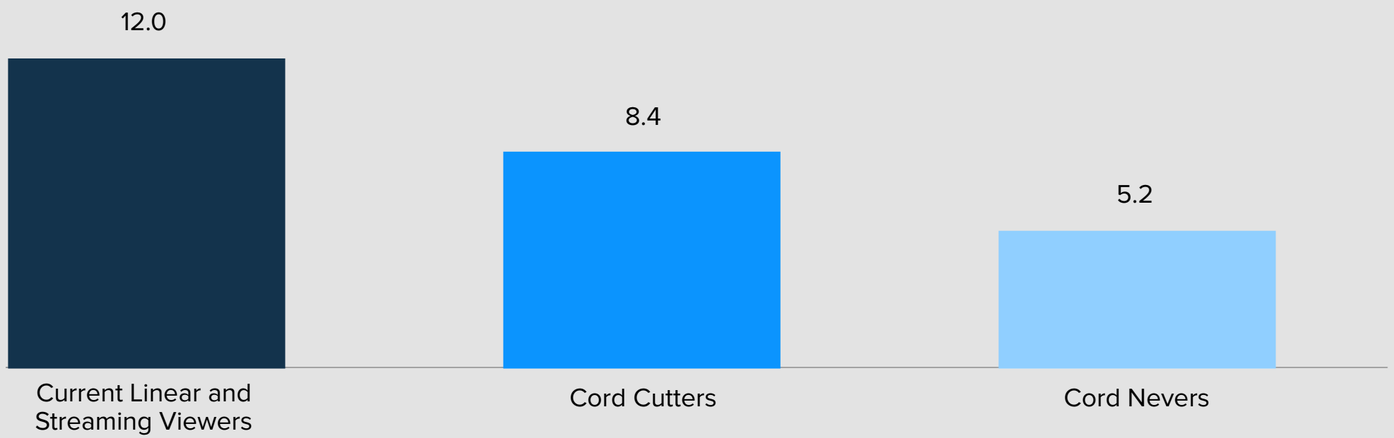
Cord Nevers: 48% of Cord Nevers are under age 34, with the vast majority under 18, meaning that a good portion of this younger generation does not engage with linear TV.

Cord Cutters: 49% of Cord Cutters are over age 55, which means that, contrary to widespread assumptions, senior viewers are also moving away from linear as streaming options continue to expand.

Time Spent Viewing by Age and Viewer Type



Number of Apps Installed for Linear, Cord Cutters, and Cord Nevers



What Are They Watching?

Cord Nevers are finding programming and content on fewer apps overall. These viewers tune into just 5.2 apps, compared to 12 apps for linear and streaming viewers.

Marketing Tips: Three Factors to Keep in Mind When Buying CTV

1. Identify person-level, not household viewing behaviors, to ensure you are reaching your target audience.

2. Consider co-viewing rates when determining which opportunities provide the highest value.

3. Evaluate your campaigns holistically and optimize for reach and frequency across applications to avoid wear-out.

Want more CTV insights?
Download TVision's State of CTV Report for the biggest trends in viewer engagement across networks, platforms, and brands.

We've covered why Attention metrics are an effective data set for fine-tuning a TV media mix during Upfront, but what is the best way to get started? These final three sections will provide practical tips for making the most of your Upfront budget with TVision Attention metrics.



6 Build Smarter Media Plans

Applying Attention works best when it's used together with other sources of information in traditional media planning tools, such as cost, impressions, and audience data. Any time marketers are evaluating a choice between two or more media buying options, that's a good time to incorporate Attention data and direct budget toward opportunities where ads will have the biggest impact.

Even though most media sellers are not yet pricing in a differentiated way based on Attention metrics, that doesn't mean marketers can't buy based on those metrics. This makes it an effective tool for marketers to identify undervalued impressions.

TVision's Attention data provides a much clearer picture of exactly which audience is tuning in to the ads within a particular program, on a particular network or platform at a particular daypart, and (perhaps most important of all) what their level of engagement is. That, in turn, provides a more accurate idea of the relative value of different programming and what marketers should be willing to pay for it — or not. Among the other advantages, access to this data allows advertisers to apply a "do not air" filter to low-performing networks, programs, and dayparts and eliminate them from media plans.



Start by getting planning data from the TVision platform

First, determine which tranche to evaluate (channel, daypart, etc.). This data is available in the TVision platform, under the ‘Linear TV Planning’ or ‘CTV Planning’ tabs.

Then, set your parameters, for example, you can select specific demos (ex. Females 18+, Males 18-34). The resulting reports will display historical Attention performance data for the defined audience and tranche.

Planning data is available within the Linear TV Planning dashboard, as well as the CTV Planning dashboard—which enables comparisons across both linear and CTV.

Here are a few specific steps you can take to use TVision data for:

1. Prioritizing opportunities
2. Deciding between opportunities
3. Fine-tuning your plan



Prioritize opportunities in planning lists

1. After extracting the historical performance data, create lists of the highest and lowest-performing networks.

2. Remove the networks/dayparts that are in the low-performing list so that they are not included in planning analysis. Instead, focus planning efforts on the highest performing content.

Highest Performers

Channel	Daypart	Viewability	In-View Time	Attention	Attention Time	Impression Quartiles
Channel 1	Morning	80%	12.6 s	55%	9.0 s	4th
Channel 2	Prime	87%	13.1 s	54%	8.2 s	3rd
Channel 3	Prime	84%	13.8 s	54%	7.1 s	3rd
Channel 4	Morning	81%	12.4 s	49 %	8.1 s	2nd
Channel 5	Early Fringe	75%	12.8 s	49 %	7.8 s	3rd

38% variance

in Attention from highest to lowest Network/Daypart

Lowest Performers

Channel	Daypart	Viewability	In-View Time	Attention	Attention Time	Impression Quartiles
Channel 20	Morning	51%	10.5 s	23%	7.4 s	4th
Channel 21	Late Night	78%	12.9 s	23%	6.1 s	4th
Channel 22	Early Fringe	45%	12.8 s	23%	7.7 s	3rd
Channel 23	Early Fringe	58%	12.8 s	23 %	5.8 s	2nd
Channel 24	Daytime	70%	13.1 s	22%	6.3 s	3rd

Use Attention as a tiebreaker

1. Complete the planning process, following standard procedure.

2. Where evaluating close decisions, compare the Viewability and Attention scores and select the options that have the higher performance scores.



Allocate

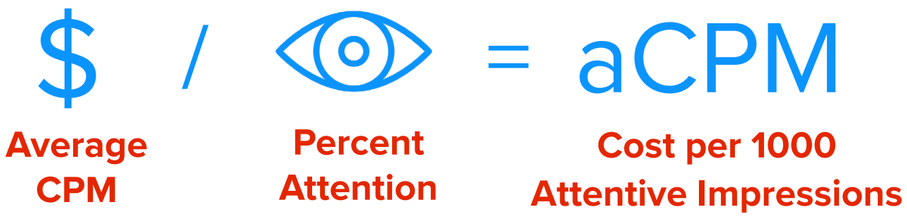
spend based on aGRP or aCPM

Level of Analysis	Placement	GRPs	Spend	Impressions	CPM	Viewability	Viewable Impressions	vCPM	Attention	Attentive Impressions	aCPM
Overall TV		1500	$230,000,000	4,537,500,000	$50.39	77%	3,509,000,000	$65.55	37%	1,663,750,000	$138.24
Channel Type	Broadcast	1000	$200,000,000	3,025,000,000	$66.12	80%	2,420,000,000	$82.64	40%	1,210,000,000	$165.29
Channel Type	Cable	500	$30,000,000	1,512,500,000	$19.83	72%	1,089,000,000	$27.55	30%	453,750,000	$66.12
Channel	Channel 1	100	$18,000,000	302,500,000	$59.50	78%	235,950,000	$76.29	42%	127,050,000	$141.68
Channel	Channel 1	5	$350,000	15,125,000	$23.14	65%	9,831,250	$35.60	25%	3,781,250	$92.56

Make planning adjustments

Typical planning factors can be adjusted based on Attention. For example, instead of trying to lower the overall CPM of the campaign, a marketer might instead try to lower the attentive CPM (aCPM) of the campaign.

Remember:



Following this process, media placements that typically result in lower levels of Attention are penalized.

It is often best to perform this analysis against different tranches of the media plan, for example, evaluating all sporting properties against one another, or all broadcast prime investments against one another. Typically, these mix decisions play a larger role in the media strategy, and it can be best to optimize within groups as opposed to completely reshaping the media plan.

This is a better deal than expected.

Daypart	Avg. Impressions	Avg. Placement Cost	Avg. CPM	CPM Rank	Attention	aCPM	aCPM Rank	Rank Chg
Prime	2,713,797	$60,000	$22	2	42%	$52	3	-1
Prime	2,453,026	$60,000	$24	4	38%	$65	4	0
Prime	748,641	$60,000	$80	8	44%	$181	7	1
Prime	916,564	$60,000	$65	6	41%	$161	6	0
Prime	2,353,925	$60,000	$25	5	38%	$66	5	0
Prime	176,963	$60,000	$339	9	35%	$981	9	0
Prime	3,241,282	$60,000	$19	1	51%	$36	1	0
Prime	812,441	$60,000	$74	7	37%	$197	8	-1
Prime	2,685,658	$60,000	$22	3	52%	$43	2	1

This may be too costly.

Want more tips to make the most of your 2022 marketing budgets with Attention?
Download TVision's practical guide,
7 Ways to Take Action with Attention Data,
for our most common use cases and step-by-step instructions.

7 Get Inspired by Your Competitors' Success

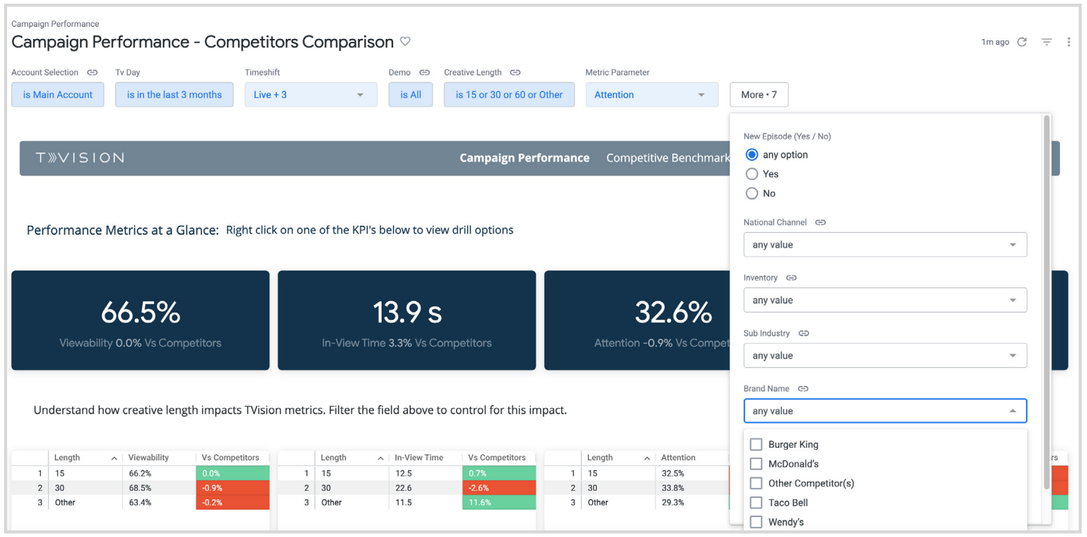
TVision collects data on all national TV campaigns and provides this information to marketers in the TVision platform. Our platform is not just for understanding marketers' own campaigns—it also unlocks a treasure trove of data on competitors' campaigns and category performance. With TVision, brands can monitor competitive activity to learn from their experiences.

In addition to providing critical benchmarking data, competitive data in the platform also helps marketers fine-tune and optimize their own media spend. We make it easy for marketers to learn from their competitors' campaigns before allocating budget to test a new daypart, channel, or genre.



Adopt best practices based on Competitive Insights

Competitive insights are available within most TVision dashboards including Campaign Performance and Creative Analysis.



Campaign Performance

Brand My/All	All Competitors				
Channel	Viewability	In-View Time	Attention	Attention Time	Impression Quart
Network A	73 %	13.4 s	40 %	8.3 s	1st
Network B	73 %	15.4 s	40 %	9.0 s	1st
Network C	75 %	12.8 s	40 %	8.2 s	1st
Network D	71 %	12.6 s	39 %	7.8 s	1st
Network E	71 %	13.0 s	36 %	7.9 s	1st
Network F	65 %	12.8 s	33 %	7.8 s	1st
Network G	65 %	12.4 s	35 %	7.5 s	1st
Network H	73 %	12.9 s	40 %	8.0 s	1st
Network I	78 %	12.8 s	43 %	7.7 s	1st
Network J	70 %	12.7 s	35 %	7.8 s	1st
Network K	63 %	12.5 s	28 %	7.1 s	2nd
Network L	69 %	13.1 s	36 %	7.2 s	2nd
Network M	66 %	11.8 s	31 %	6.7 s	2nd
Network N	61 %	12.5 s	29 %	6.5 s	2nd
Network O	75 %	12.6 s	36 %	7.7 s	2nd
Network P	72 %	12.8 s	36 %	7.8 s	2nd

Within TVision's Campaign Performance dashboard, marketers can drill down into competitors' plans, to discover the networks where their competitors are running ads and see how those ads perform for Attention and Viewability. This data can be used in planning to determine the best and most engaging networks, programs, and dayparts for their specific industry category.

Use competitive knowledge in negotiations

The Campaign Performance dashboard provides insight into how the brand's ads are engaging viewers as compared to their competitive set. This benchmark allows marketers to understand if they are accessing the best inventory within the networks in their plan. For instance, if the competition is capturing higher Attention, marketers can work with those networks to optimize their future upfront investment.

Brand My/All	My Brands			All Competitors		
Channel	Viewability	In-View Time	Attention	Viewability	In-View Time	Attention
Network A	56 %	12.3 s	27 %	76 %	12.4 s	44 %
Network B	76 %	12.4 s	38 %	76 %	15.8 s	38 %

8 Get More Value from Ad Budgets with Engagement Guarantees

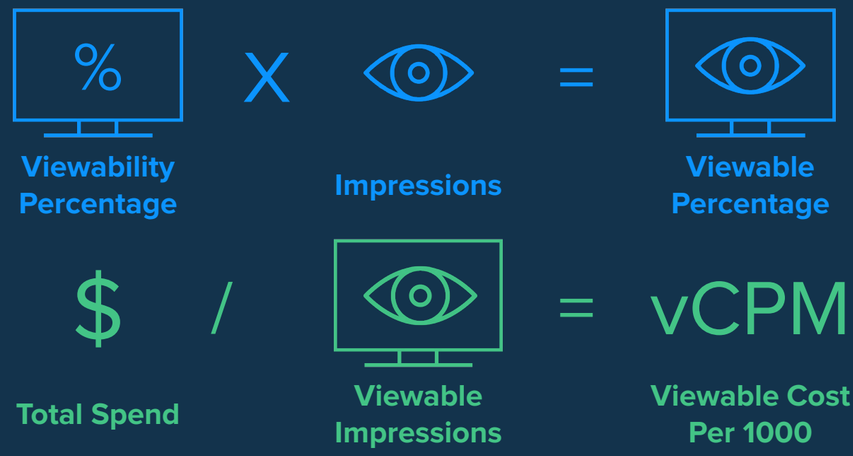
Marketers can take Attention data a step further during the Upfront season with Engagement Guarantees. Engagement Guarantees require collaboration and alignment between networks and media buyers, both working towards a common goal. Working in partnership, media sellers and advertisers create campaigns that commit to a specific number of attentive or viewable impressions.

What is an Engagement Guarantee?

- Engagement Guarantees optimize media plans toward content where audiences are in the room when the ad is aired.
- Most are based on Viewability metrics. The media buyer and seller commit to a vCPM (viewable CPM).
- vCPMs are determined based on the historical performance of ad viewability rates for networks, dayparts, and programming.
- The media seller guarantees viewable impressions and tracks performance against this deliverable throughout the campaign, optimizing placements as needed to achieve agreed-upon Viewability rates.

Setting up an Engagement Guarantee

Engagement Guarantees help ensure that networks are accountable for delivering the audience and impressions that the marketer purchased. Instead of building a plan that just focuses on increased reach, the network groups are applying TVision data to brand campaigns to build a plan that increases reach and guarantees it will deliver an increase in viewable impressions.



While this is a collaborative and partner-based effort with the Networks, there are still important steps that brand marketers can take to ensure that the Engagement Guarantee sets appropriate standards.

3 Steps Toward Engagement Guarantees

1. **Outline budget scenarios with network partner:** Use TVision's viewability metrics for the network's inventory, including channel, daypart, programs, and demographic data to rank potential placements based on viewability (low, average, good, or great).

2. **Create the media plan:** Collaborate with the networks on a media plan using traditional inputs including impressions, audience demographics, and programs. Use TVision's viewability metrics as a benchmark in formulating a plan that is optimized for viewability.

3. **Negotiate a vCPM:** After reaching an agreement on a standard CPM, negotiate a viewable CPM, which is total spend divided by viewable impressions.

Ensuring a successful Engagement Guarantee

Once a brand and network have agreed on an Engagement Guarantee, they can monitor the campaign and ensure goals are met within a custom TVision dashboard.

The brand and network each must have access to the same TVision data. The network will use this custom dashboard, and regular reports generated and delivered by TVision to monitor viewability and adjust as needed to meet the guarantee.

Case Study: Anheuser-Busch increases viewable impressions by 7.6%

In a Q4 2020, campaign Anheuser-Busch, their agency, Dentsu, and A+E Networks partnered on an Engagement Guarantee. A+E used TVision Attention data to guarantee their ads were viewed by in-room audiences.

HOW IT WORKED:

TVision reported the number of impressions served against Budweiser's target demographics, as well as the percentage of impressions served while someone was actually in the room. Anheuser-Busch was able to track improvements in viewability as A+E optimized the buy.

THE RESULTS:

7.6% more viewable impressions for Anheuser-Busch – or put another way, a lot less wasted ad budget for the global brewer. Anheuser-Busch intends to make engagement guarantees their dominant media strategy for future buys.

"We should use Attention and Viewability to transact in the industry in order to achieve a better measure of ad impact since it reflects the way people truly consume media."

Paolo Provinicalli, Vice President, Media at Anheuser-Busch



Start Adding Attention Data to your Upfront Planning

The Upfront may be transforming, but Attention data provides the necessary transparency to navigate the changing landscape with confidence. Both marketers and media sellers can improve the Upfront process by better understanding the value of each impression.

Whether investing in Primetime TV, Live TV, or CTV, marketers can dramatically improve the impact of their television campaigns by factoring in Attention and Viewability data. Likewise, networks can more highly value programming that delivers highly engaged audiences.



Ready to Take the Next Step?

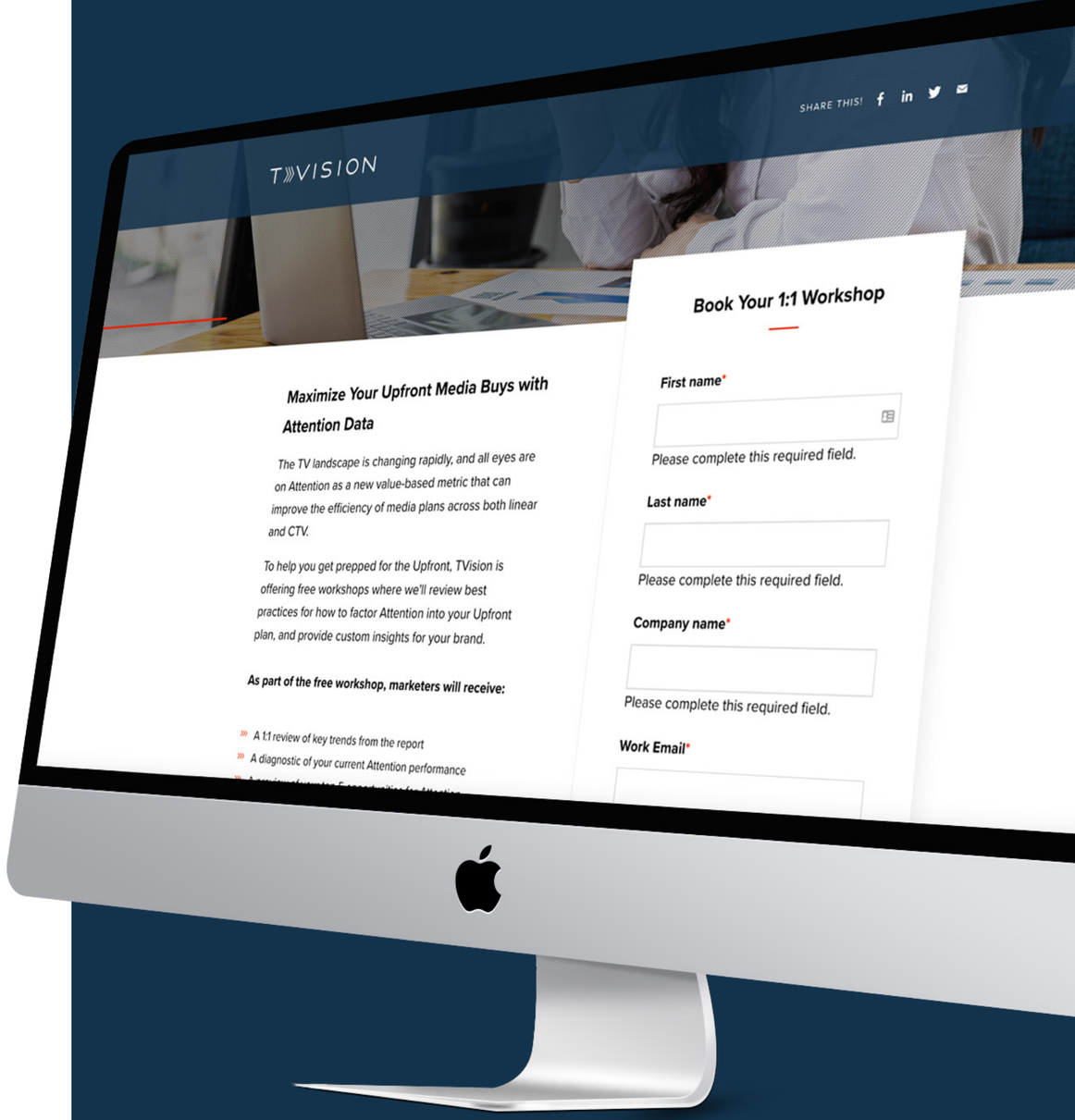
TVision is offering free 1:1 planning workshops to help you maximize the impact of your Upfront.

Register for a Free Workshop

As part of the free workshop, marketers will receive:

- A 1:1 review of key trends from the report
- A diagnostic of your current Attention performance
- A preview of your top 5 opportunities for Attention
- An upfront action plan

Spots are limited. Sign up today to claim your spot and take advantage of this opportunity.



Contact TVision to learn more.
hello@tvisioninsights.com

TVISION

About TVision Insights

The Leader In TV Engagement Metrics

TVision measures what was once unmeasurable— how people really watch TV. Using cutting-edge computer vision technology, only TVision measures person-level, second-by-second TV engagement.

Marketers and media sellers access TVision's TV performance metrics via its software-as-a-service platform. TVision's customers include some of the largest brands in the world, top media networks, and streaming applications.

MEDIAHUB

About Mediahub Worldwide

Mediahub is a global media planning and buying company with over 900 employees worldwide. We are an award-winning agency built for challenger brands or companies who are disrupting the status quo and want a media agency that disrupts the norms of media. Our smart and nimble organization consists of key verticals including I+A (Insight + Action comms group), P3 (programmatic, search and social group), and our creative media group, the R+D (Radical + Disruptive) Lab, which specializes in working with avant-garde media partners to develop ideas that consumers seek out, share and talk about. Mediahub was named Adweek's 2018 U.S. Media Agency of the Year and Ad Age's 2019 and 2020 Media Agency of the Year. Mediahub is one of the three major Interpublic media agencies (NYSE: IPG) and as a result is powered by the buying and intelligence power of Magna Global and the data and tech backbone of Kinesso.

Definitions & Methodology

Methodology

TVision measures Ad Viewability and Ad Attention for every second of programming and advertising on television. Every time a person walks into the room, our technology detects who the viewer is, where they are in the room, and what their eyes are looking at. We do all this without personally identifying individual users, and without transmitting any images or videos.

TVision's data is collected from an opt-in panel of 5,000 homes across the United States. All data are weighted to represent the country. All demographic data is self-reported by the respondents.

Metrics

Ad Attention (%): This measures how effectively an ad holds viewer attention. It is measured as the percentage of all ad impressions in which the viewer was looking at the TV screen for two or more seconds.

Ad Viewability (%): This metric measures how effectively viewers are kept in the room while ads are on-screen. It is measured as the percentage of all ad impressions in which a viewer was in the room for two or more seconds.

Co-Viewing Rate (%): This measures the proportion of episode or app views that occur with another viewer present for 5 or more minutes.

Attention Index: This is the average amount of seconds that viewers engage with a program.

Attention to Duration Index: Attention to Duration measures how much of the total episode is spent with eyes on the screen. 100 is the benchmark for linear TV

aCPM: Attentive CPM is the CPM adjusted for attention, specifically the CPM divided by percent attention of the impression.

TVISION

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MEDIAHUB

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