



ExchangeWire research
The business of media, marketing and commerce



Attention in Advertising 2023

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In association with

 **sharethrough**

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Executive summary

The global digital advertising industry is undoubtedly going through its most significant shift in decades. Legislative efforts to bolster user privacy and the deprecation of identifiers in desktop and mobile environments have significantly impacted the effectiveness of third-party cookies, which previously underpinned user-level targeting, the linchpin of performance-based digital advertising. This fundamental transition in the sector away from third-party cookie-based identifiers, coupled with current economic headwinds, has heightened interest in alternative definitive metrics to measure and optimise advertising performance, while maintaining consumer privacy.

Of these alternative metrics, attention is generating substantial interest across the supply chain. Defined in its most basic form as the time a consumer spends looking at or listening to an ad, media buyers and publishers alike are honing in on attention, given that capturing consumer attention effectively has been strongly associated with driving real-world outcomes. Previous [research undertaken by UK publishing group Mail Metro Media](#) has suggested that the more attention is captured by an ad, the higher the purchase intent will be. Moreover, data [published by Ebiquity](#) has detailed a strong relationship between the attention generated by an ad and sales conversions. With audiences [exposed to approximately 4,000 advertising messages per day](#), it is no surprise that advertisers are seeking to ensure that their ads receive the most attention and thus demonstrate effectiveness of marketing spend, particularly as investment markets shift towards current profitability over future growth potential.

However, while the theoretical benefits of attention as an advertising metric are well understood, it is less clear how media buyers are capitalising upon this on a practical basis today. JF Cote, CEO of Sharethrough explains why they partnered with ExchangeWire to study attention:

“Capturing attention has and always will be the key for advertising effectiveness. However, as attention becomes more fragmented, consumers have more control and ability to skip or simply not pay attention to ads. Advertisers are having a harder and harder time earning attention. That’s why at Sharethrough, we’ve been studying consumer attention for over a decade to learn what simple but effective ways technology can help enhance CTV, video, display and native ads to improve attention and, therefore, advertiser outcomes.

“We decided to partner with ExchangeWire to assess how media buyers across brands and agencies within the UK are capturing attention, what factors are impacting attention most heavily in their opinion, and whether further training and industry standards are required within the market. Moreover, we assess the performance of specific ad enhancements offered by Sharethrough in capturing attention among media buyers. Combining original quantitative data with insight from industry thought leaders, this study examines the following:

- Use of attention metrics by UK media buyers
- Respondent willingness to pay more for ads that better attract attention
- Factors impacting consumer attention
- How media buyers are currently capturing attention
- Industry standards and education around attention
- Performance of Sharethrough ad enhancements in capturing attention”

As detailed within the report, UK media buyers are embracing attention KPIs within their digital media strategies, and are generally willing to pay substantial premiums on ads which attract more attention. Buyers are also keenly exploring nascent methods of measuring attention, as well as exploring partnerships with third-party technology providers to help facilitate this.

However, further education is required to ensure media buyers at smaller, local firms are able to measure and optimise around attention, while the formation and adoption of robust industry standards are needed to ensure consistency in reporting results and avoiding budget wastage.



JF Cote
CEO of Sharethrough

Key findings

2/3

of media buyers within the UK factor in attention KPIs

32%

of brand marketers are using partnerships with third-party technology suppliers for attention measurement

80%

more attention captured by Sharethrough Dynamic Captions Ad Enhancement over control creative

ATTENTION IN ADVERTISING

- I. Two-thirds of media buyers within the UK factor in attention KPIs as part of their digital media strategies.
- II. The majority of buyers within the UK market are willing to pay more for ads that attract better attention.

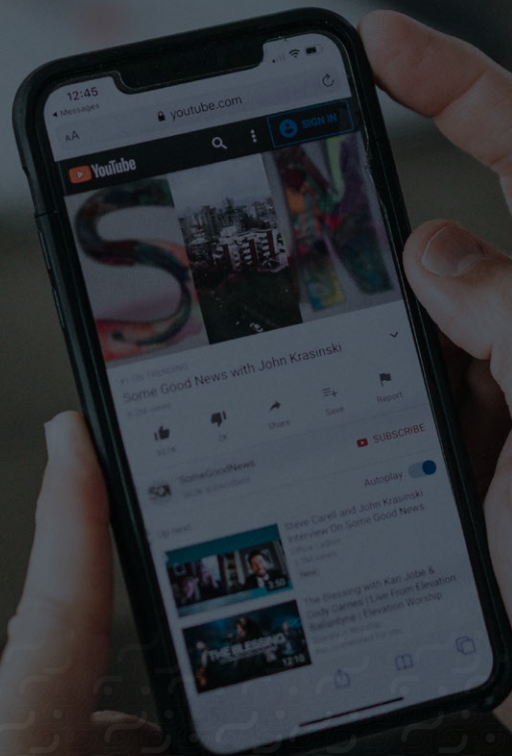
→ Where UK media buyers are willing to spend more on ads that better attract attention, over one-third are willing to spend a premium of 30% or higher.
- III. Across the UK market, a wide range of factors were identified as having the most significant impact on consumer attention, indicating that attention has no one-size-fits-all approach and is highly dependent on elements such as audience and brand vertical.
- IV. Viewability remains a leading metric for tracking attention, though a high proportion of respondents are tracking this more granularly via in-view time. Encouragingly during the current period of identifier deprecation on desktop and mobile environments, UK media buyers are also experimenting with alternative methods for measuring attention beyond viewability.
- V. A significant proportion of media buyers are also exploring partnerships with third-party technology suppliers for attention measurement, with nearly one-third (32%) of brand marketers and 29% of agency professionals using such partnerships to track attention.
- VI. Nearly two-thirds of surveyed UK media buyers believe that there is currently a lack of robust industry standards for attention measurement.

SHARETHROUGH AD ENHANCEMENT TESTING

- I. Dynamic Captions and Enhanced/Native Display ad enhancements performed significantly better in terms of capturing attention than control creatives, capturing up to 80% more.
- II. Tested CTV enhancements (Countdown; Sports Ticker; and Weather Enhancement) performed strongly among surveyed media buyers at scaled, global agencies, typically the most active investors in this channel.

Section 1:

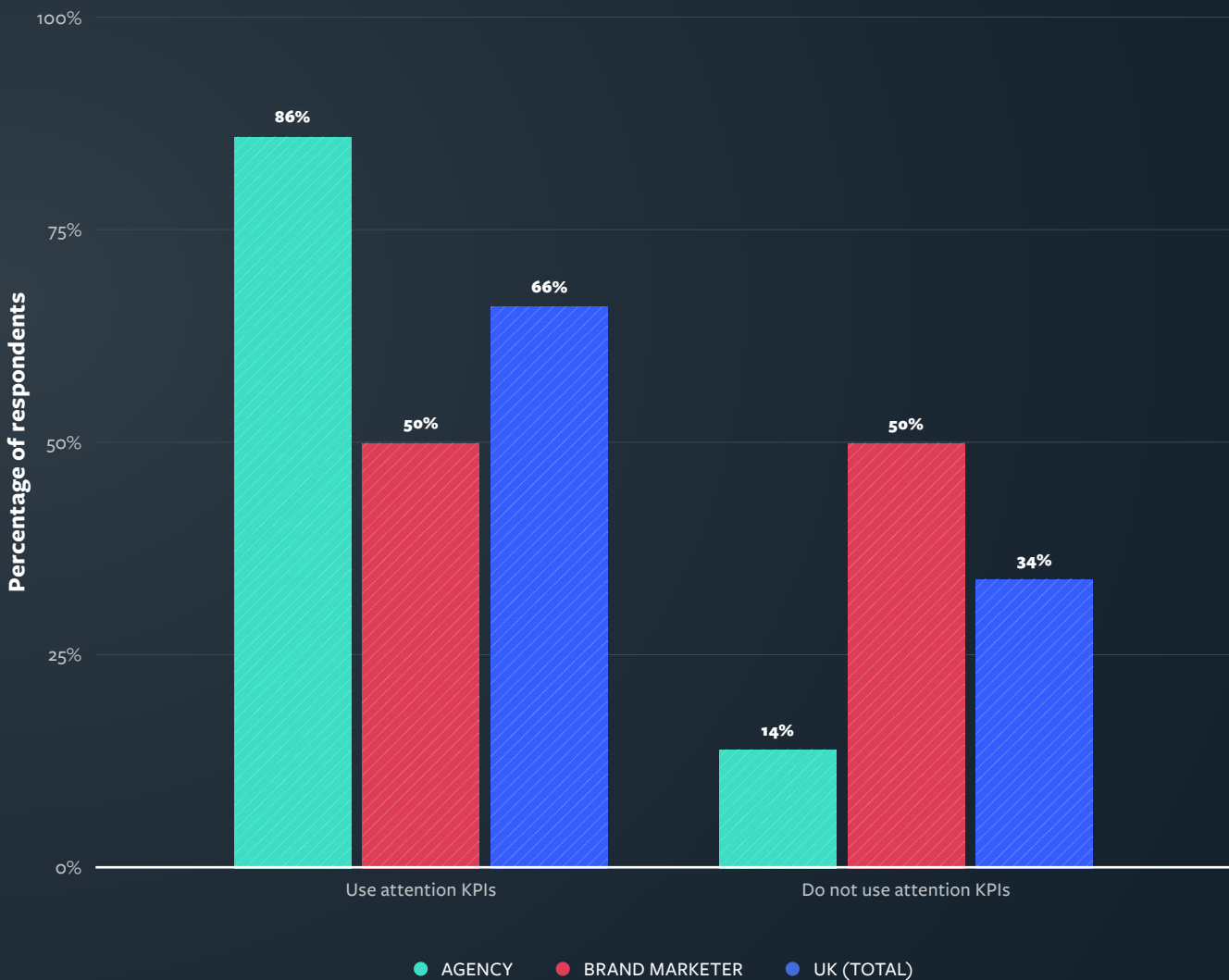
Attention Metrics & KPIs



Use of attention KPIs

Overall, two-thirds (66%) of media buyers within the UK factor in attention KPIs as part of their digital media strategies. However, attention is currently a more important component for agencies in crafting digital media strategies compared to brand marketers, with 86% of agencies factoring attention, compared to half of surveyed brands. Similarly, attention-based KPIs are more commonly factored into digital media strategies for large companies (500–10,000+ employees), with 81% using attention KPIs, compared to small companies (1–50 employees), with 44% of these using attention KPIs.

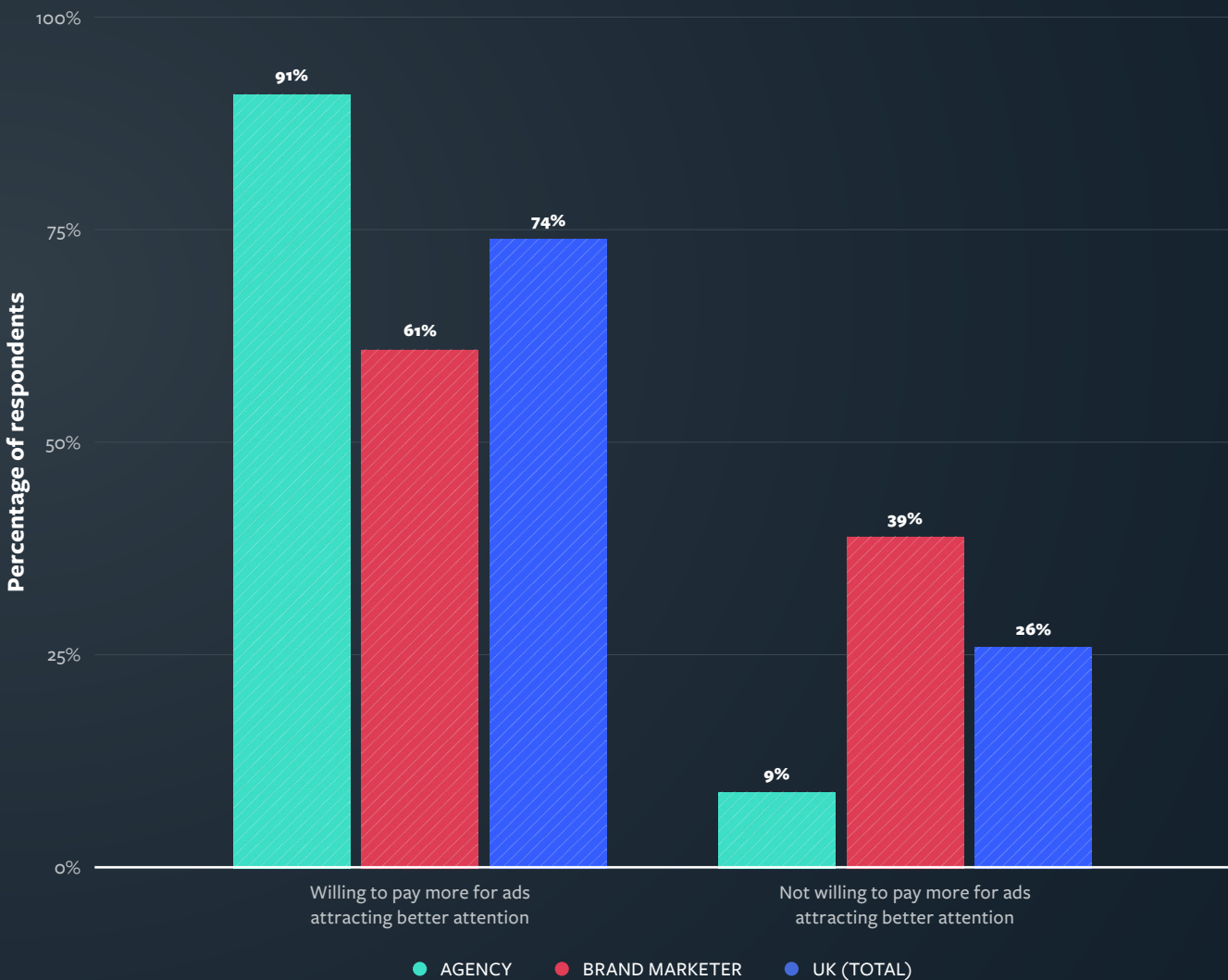
Figure 1: Use of attention KPIs as part of digital media strategy — by company type



Willingness to pay more for ads attracting better attention

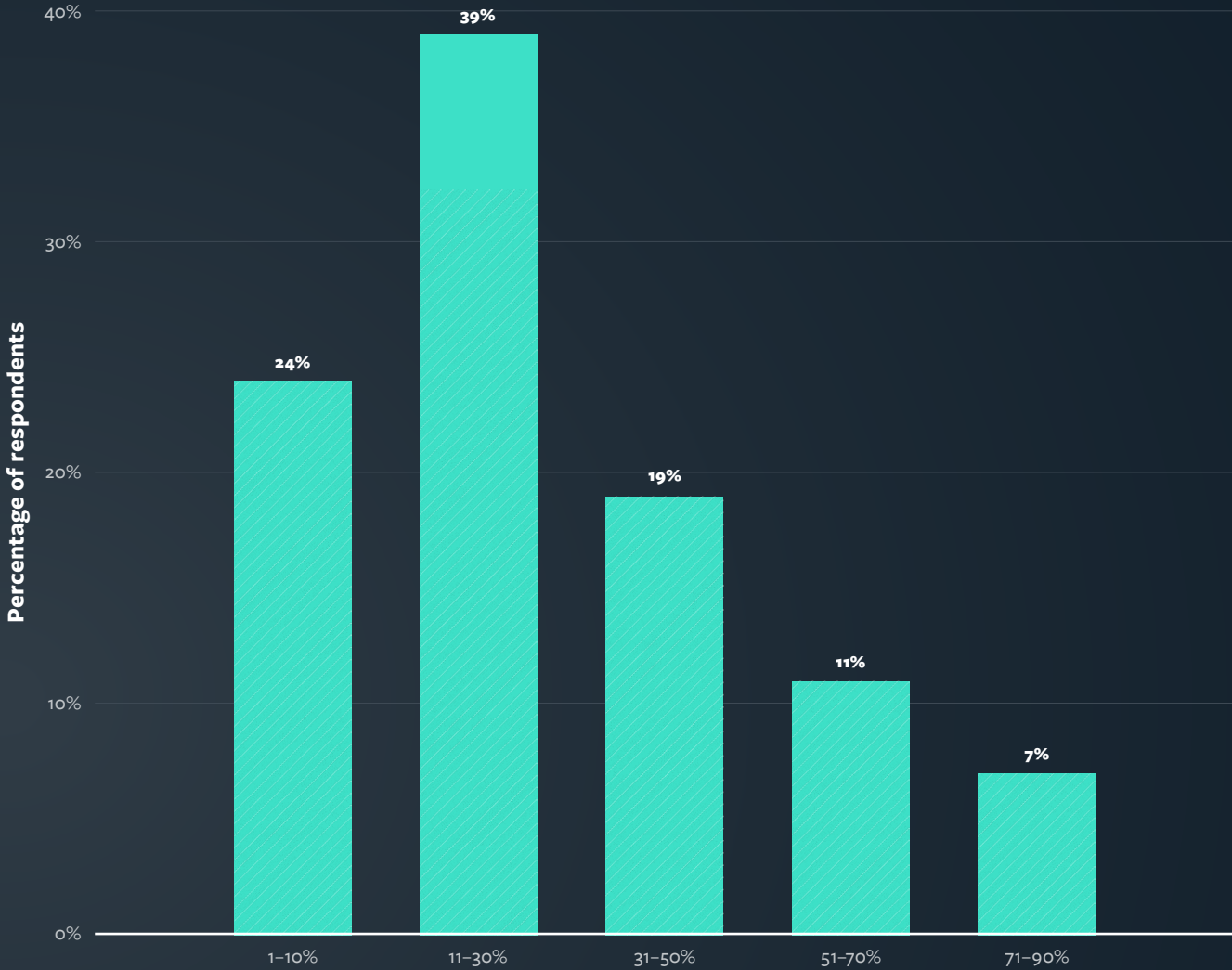
The relationship between attention and return on investment (ROI) is generally well-understood by the UK market, with nearly three-quarters of respondents (74%) stating that they are willing to pay more for ads that attract better attention, which is consistent across all surveyed media buyer types and company sizes. According to our findings, agency professionals are generally more willing to pay more for ads garnering more attention than brand participants are, at 91% and 61%, respectively, consistent with the previous finding whereby agencies are more comfortable factoring attention-based KPIs into their media strategies.

Figure 2: Willingness to pay more for ads attracting better attention



Furthermore, where UK media buyers are willing to spend more on ads that better attract attention, over one-third (37%) are willing to spend a premium of 30% or higher. UK agencies are significantly more likely to pay a higher premium for ads that garner more attention, with 54% willing to pay a minimum of 30% more for ads that attract more attention, compared to 18% of brands.

Figure 3: Premium for ads that better attract attention — UK



Premium for ads that attract better attention

The premium that UK media buyers are willing to pay for ads that better attract attention scales according to company size, with 32% of scaled media buyers willing to pay a premium of over 50% for ads that better attract attention. Contrastingly, no surveyed media buyer in a small company was willing to pay that high of a premium.

37% of UK media buyers are willing to spend a premium of 30% or higher on ads that better attract attention

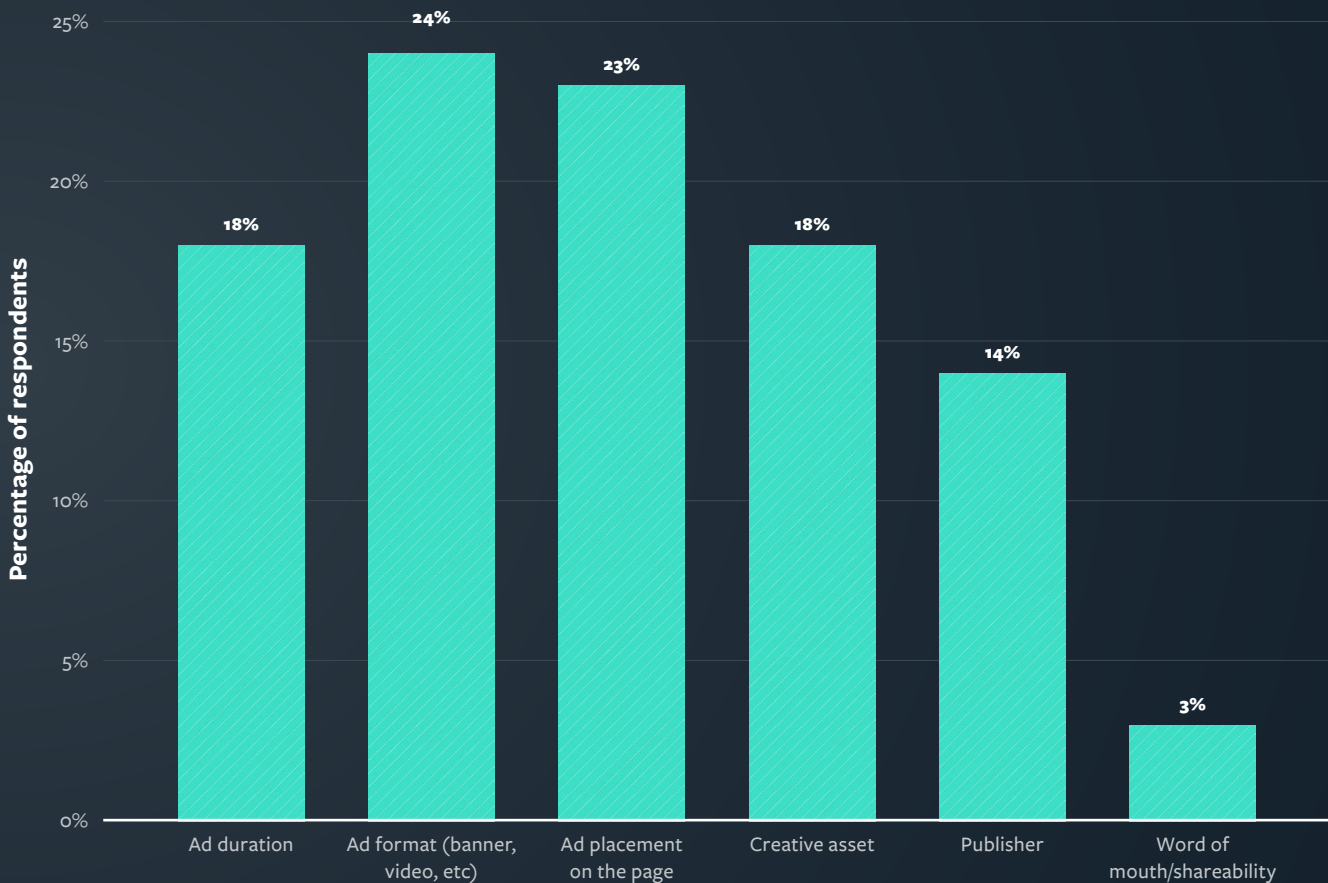
54% of UK agencies are willing to spend a minimum of 30% more for ads that attract more attention, compared to 18% of brands

Factors impacting consumer attention

Across the UK market, a wide range of factors were identified as having the most significant impact on consumer attention, indicating that attention has no one-size-fits-all approach and is highly dependent on elements such as audience and brand vertical.

Ad format (for example banner versus video) was the most-commonly cited factor (24%), closely followed by where an ad was positioned on a given page (23%), and both ad duration and creative asset used (both 18%). The emergence of attention-based media quality measurement solutions, ad enhancement technology, and dynamic creative optimisation (DCO) solutions in recent months will allow media buyers to adjust campaigns according to these factors, though further training and the development of industry standards may be needed to help smaller market participants to capitalise on these tools.

Figure 4: Factor with most significant impact on consumer attention — UK



Factor with most significant impact on consumer attention

Among agencies, the creative asset used was the most-commonly cited factor (27%) for influencing consumer attention, followed by the duration of the ad (23%). Meanwhile, brand marketers were more focused on the positioning of the ad, with location of the ad placement and ad format cited as the joint-most impactful factor for influencing consumer attention, at 29%.

Attention measurement

A wide variety of methodologies are currently used by UK media buyers to measure attention. Despite only being a measure of whether an ad has the opportunity to be seen (defined as 50% of the ad’s pixels visible in the browser window for a continuous one second for standard display ad formats), rather than a true measure of attention, viewability remains a leading metric for tracking attention according to surveyed buyers, cited by 37% of respondents overall.

Indeed, previous research performed by Meta and Dentsu determined that there is only a weak correlation between the percentage of an ad that is “viewable”, and the percentage of an ad that is actually viewed. This is likely to stem from a current lack of industry standards around attention measurement methods, nascency of tools to appropriately measure attention, and the need to train media buyer teams on attention measurement.

Encouragingly however, during the current period of identifier deprecation on desktop and mobile environments, a similarly high proportion of respondents (32%) are tracking attention and viewability more granularly via time-in-view. Moreover, UK media buyers are experimenting with alternative methods for measuring attention beyond viewability, with 30% employing eye tracking and facial recognition technologies, and 25% using panel and survey tools.



32% of respondents are tracking attention and viewability more granularly via time-in-view

30% of respondents are employing eye tracking and facial recognition technologies



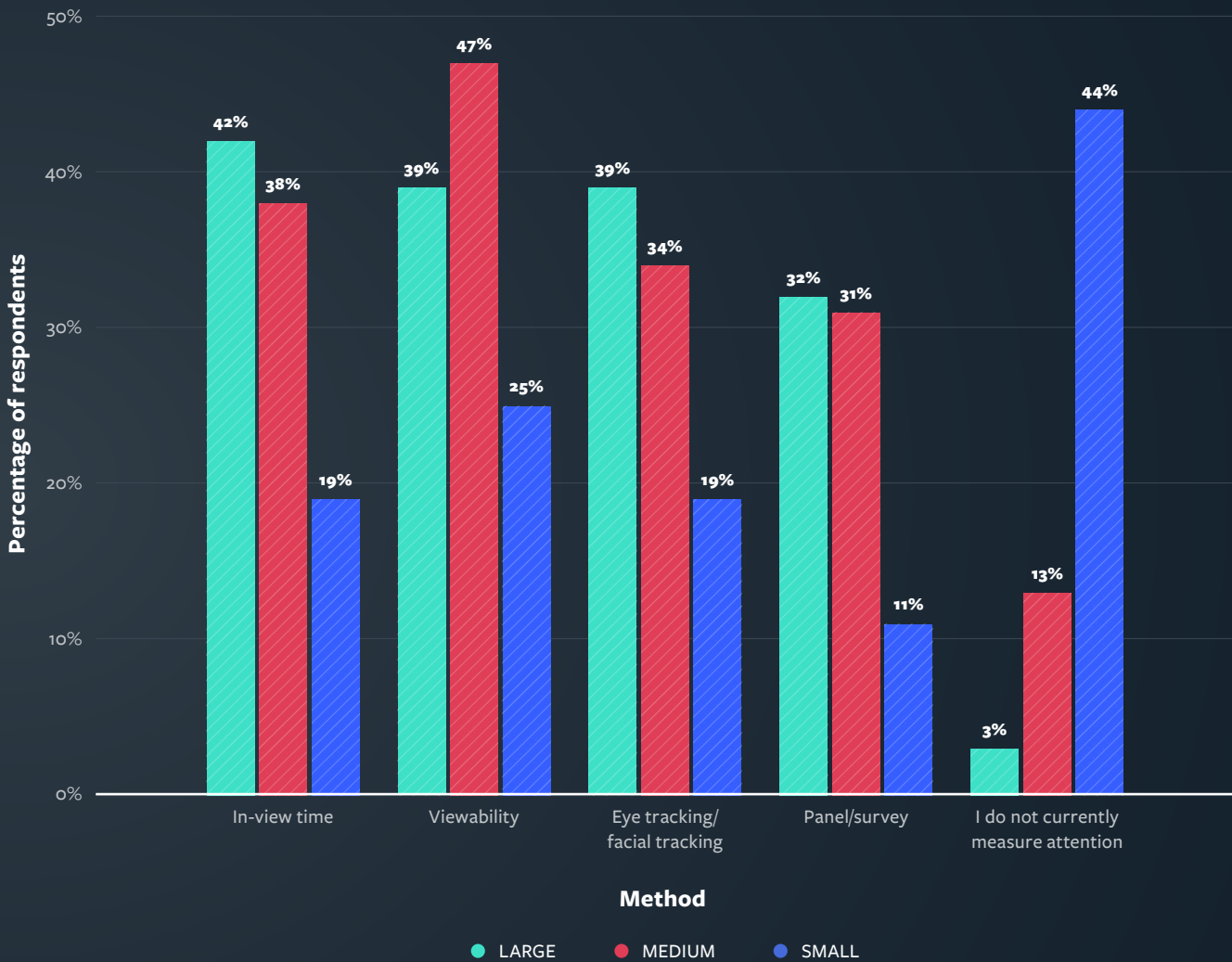
Figure 5: Methods for measuring attention — by company type



Brand marketers are predominantly using viewability (32%) as a proxy to track attention, followed by time-in-view and panel/survey tools (27%). However, a significantly high proportion of brands are not currently measuring attention compared to agencies, at 34% over 5%. Meanwhile, agencies are leaning more heavily towards eye tracking and facial recognition technologies (41%) over panel/survey tools (23%) as an alternative method of tracking attention over viewability.

Media buyers at larger firms employ the widest range of methods in measuring attention according to our findings, with all surveyed methods being used by 32% of scaled firms (excluding the 3% which are not currently tracking attention). Meanwhile, a significant proportion (44%) of smaller companies are not currently measuring consumer attention on their advertising campaigns. As marketing effectiveness is critical for smaller firms, particularly during the current period of economic uncertainty, this is a concerning finding and one which should be addressed as a wider industry to ensure small businesses can benefit from measuring and acting upon attention.

Figure 6: Methods for measuring attention — by company size



Where media buyers are currently measuring attention, the majority (51%) are currently using in-house or proprietary technologies, with a marginally higher penetration among brands than agencies (51% compared to 45%). However, a significant proportion of media buyers are also exploring partnerships with third-party technology suppliers for attention measurement, with nearly one-third (32%) of brand marketers and 29% of agency professionals using such partnerships to track attention.

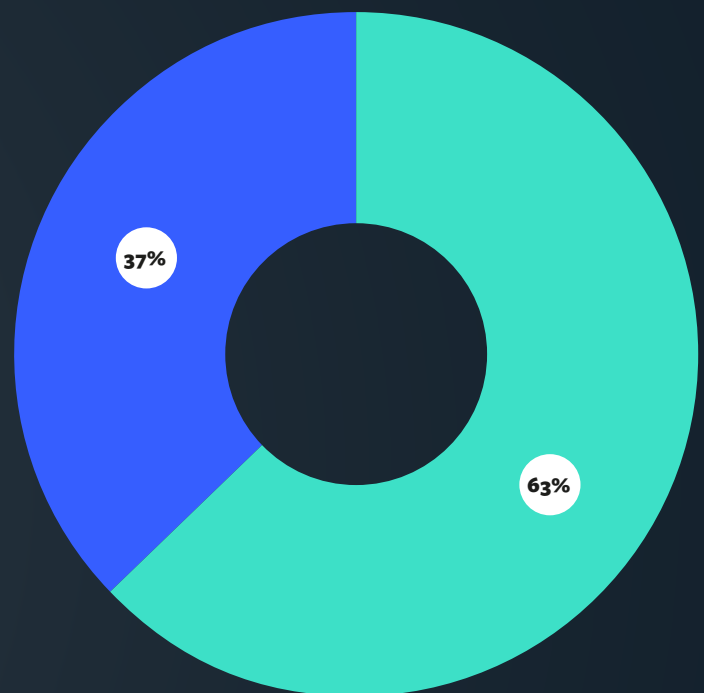
Industry standards for attention

The majority (63%) of surveyed UK media buyers believe that there is currently a lack of robust industry standards for attention measurement. Moreover, this belief is consistently held across all levels of UK media buyers' businesses, with 59% of heads of business and C-suite executives stating that they believe there is a lack of standards, closely matching that of non-leaders (66%).

Figure 7: Belief that there is a lack of industry standards for attention measurement

- BELIEVE THAT THERE IS A LACK OF INDUSTRY STANDARDS FOR ATTENTION MEASUREMENT
- DO NOT BELIEVE THAT THERE IS A LACK OF INDUSTRY STANDARDS FOR ATTENTION MEASUREMENT

The belief that there is a lack of standards for attention measurement is more strongly held amongst UK agency professionals (77%) than brand marketers (52%). Overall, the strength of opinion that there is currently a lack of industry standards for attention measurement scales according to company size, with the belief more strongly held by media buyers at large firms (68%) compared to those at medium- (63%) and small-sized (58%) businesses.



These findings are somewhat concerning, as these are the firms that are most likely to pay a higher premium for ads that attract greater levels of attention. If robust industry standards are therefore not developed and consistently adopted, this could lead to wasted budget, which has detrimental effects across the entire advertising supply chain, especially during the current period of economic uncertainty.

63%

of surveyed UK media buyers believe that there is currently a lack of robust industry standards for attention measurement

59%

of heads of business and C-suite executives state that they believe there is a lack of standards

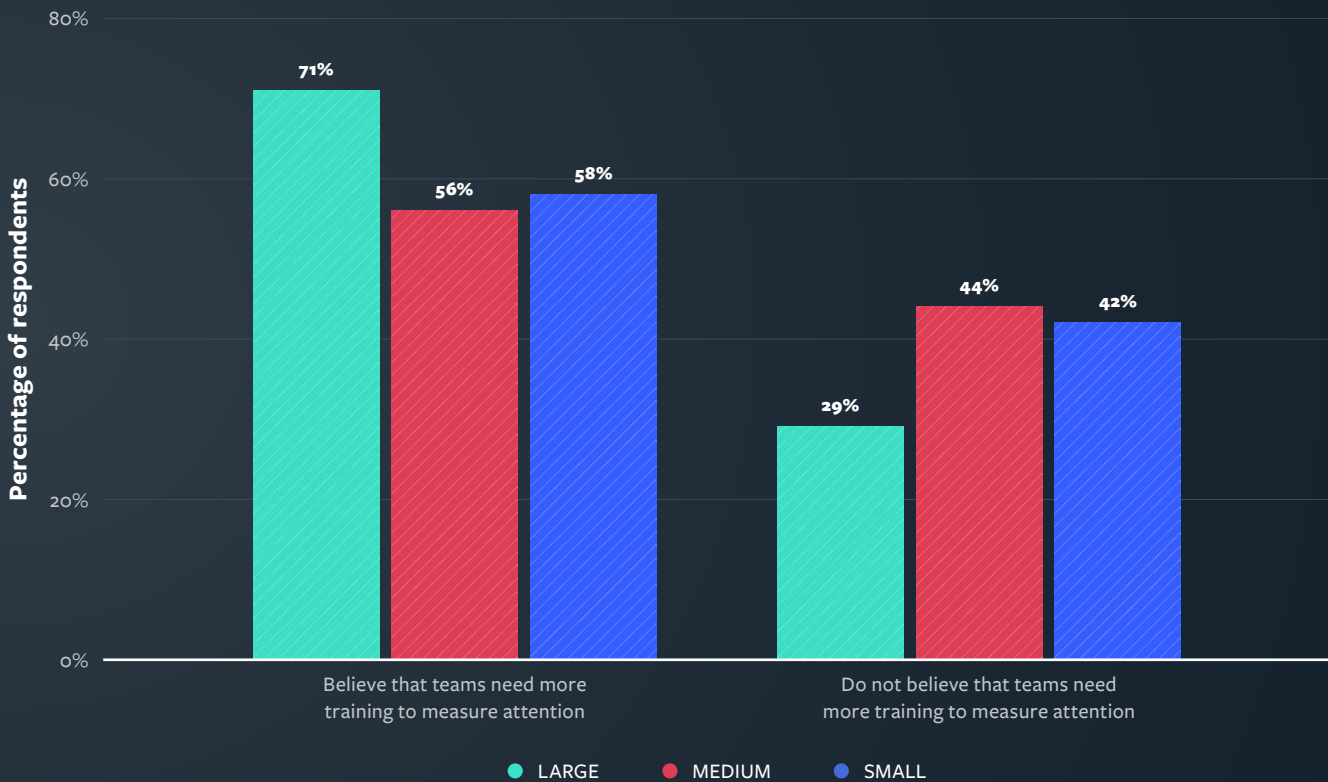
Training & education

The majority of media buyers across all surveyed company types and sizes believe that their teams need to be given further training to properly measure and capture attention, with 62% overall stating this.

Similarly to industry standards for attention measurement, this opinion is more strongly held among agency professionals compared to brand marketers, at 77% versus 52% respectively. Moreover, there is a significantly stronger opinion across media buyers at large firms that their teams require more training to appropriately measure attention, at 71% compared to 56% (medium-sized firms), and 58% (small-sized firms).

In order to address this need for education, Sharethrough is offering dedicated Attention in Advertising Workshops that cover quantitative and qualitative ways to measure attention and solutions available to target ad placements with higher likelihood of capturing attention, and research on how simple enhancements to standard ad placements can significantly improve attention.

Figure 8: Belief that teams need more training to measure attention — by company size



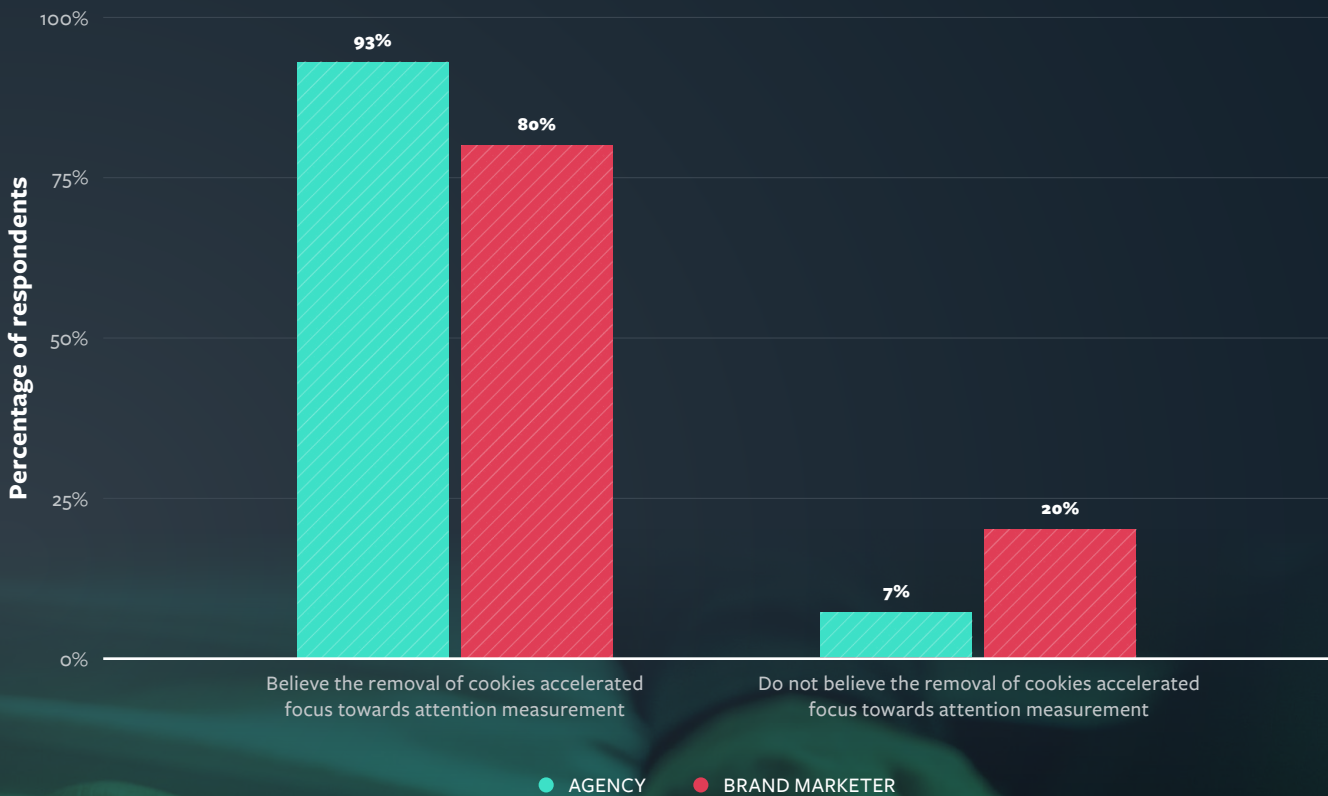
Notably, the larger firms that weigh the greatest level of importance to attention metrics, and are therefore more likely to pay higher premiums on ads that better capture attention, are also those that claim that their internal teams require more training on how to measure attention. This is likely to stem from a lack of current industry standards and measurement tools, as previously highlighted, though industry-wide consultative efforts are recommended to ascertain this.

While there is generally a UK-wide opinion that teams require more training to measure attention, this seemingly pertains more towards campaign reporting and subsequent follow-on planning, with a resoundingly strong majority (97%) of surveyed respondents believing that creative teams are currently doing a good job in creating ads that maximise attention.

Deprecation of third-party cookies

UK media buyers generally believe that the deprecation of cookies across browsers has accelerated market focus towards attention measurement, with 86% stating that this was the case. This belief was consistently held across the market across surveyed company sizes and types (agency versus brand).

Figure 9: Belief that removal of cookies accelerated focus on attention measurement



Section 2:

Testing Sharethrough Ad Enhancements Against Standard Ad Formats

As detailed within Section 1, a number of factors including ad format, placement, and creative format are important in capturing attention among media buyers within the UK. However, previously it was highly challenging for marketers to optimise creatives and their respective placements based upon attention. To correct for this, in recent years we have seen the emergence of in-campaign ad enhancements and technology solutions support the work of creative teams in optimising towards attention.

As part of its mission to promote human-centric programmatic technologies, Sharethrough has conducted extensive behavioural research projects over the past decade in order to better capture user attention and maximise ad comprehension. Using the insights from these studies, Sharethrough has developed a suite of advert enhancement technologies designed drive engagement and message retention in a user-friendly manner. To assess the performance of these tools in capturing attention, we tested the performance of multiple ad enhancements that are supported by Sharethrough technology in A/B tests versus control creatives, specifically:



SHARETHROUGH AD ENHANCEMENTS FOR DESKTOP AND MOBILE

- Dynamic Captions
- Enhanced Display
- Enhanced Native

SHARETHROUGH AD ENHANCEMENTS FOR CTV

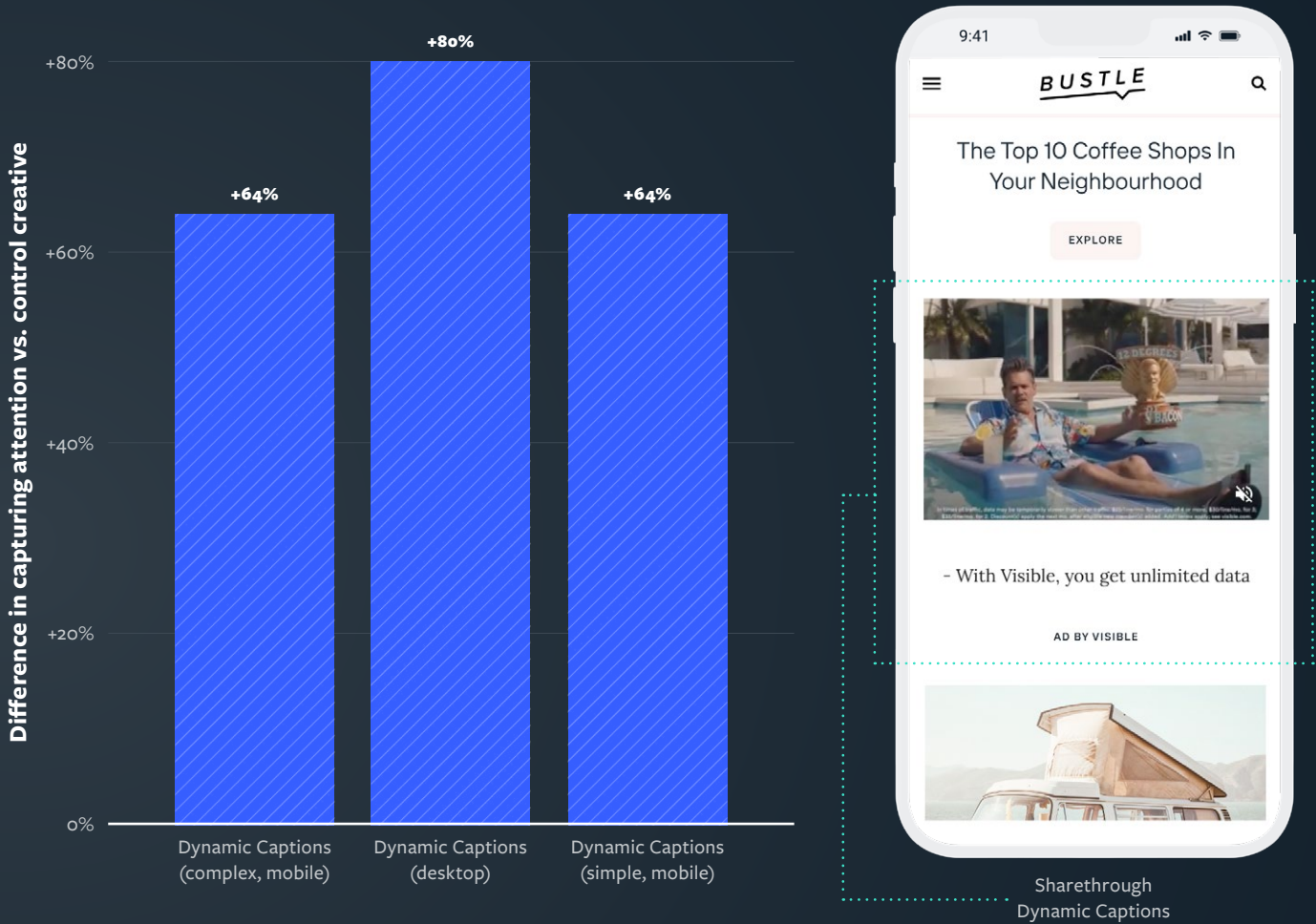
- Countdown
- Sports Ticker
- Weather Enhancement

Desktop and mobile enhancements

SHARETHROUGH DYNAMIC CAPTIONS

Overall, Dynamic Captions, which are captions that animate in the headline space where eye-tracking studies confirm viewers' eyes look first, was the best-performing ad enhancement across display and mobile environments in terms of capturing attention. Moreover, they outperformed control creatives across all surveyed company types and business sizes, though there was significant variance in how well each tested creative was received among these groups.

Figure 10: Sharethrough Dynamic Captions — difference in capturing attention vs. control creative

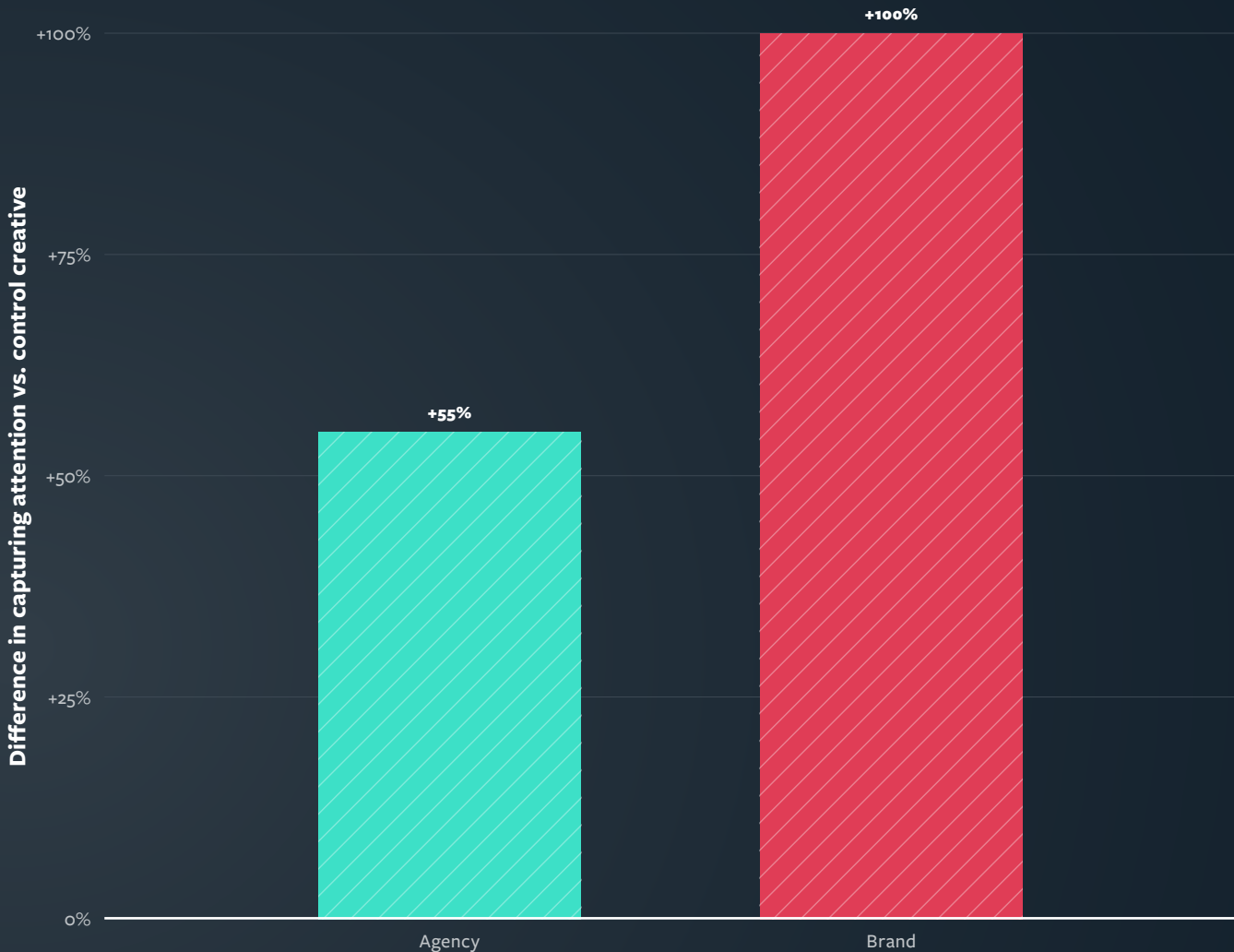


Firstly, the creative featuring simple (18 words over 5 captions) Dynamic Captions on a mobile screen was 64% better at attracting attention than the control creative overall. This example was particularly well-received among agency professionals, capturing 82% more attention than the control, compared to 50% more attention for brand participants.

For the second mobile device test for Dynamic Captions, featuring more complex captions than the above creative (47 words over 7 captions compared to 18 words over 5 captions), Dynamic Captions again performed 64% better in terms of capturing attention compared to the control creative. Complex mobile Dynamic Captions tracked marginally better for brand marketers (+57% compared to +50%) and marginally worse for agencies (+73% compared to +82%) in terms of capturing attention when compared to the simple mobile creative.

Dynamic Captions on desktop was the most effective surveyed ad enhancement at capturing attention, outperforming control creative by 80% overall. Desktop Dynamic Captions were particularly effective at capturing attention from brand marketer participants, with this outperforming control creative by 100%.

Figure 11: Dynamic captions by Sharethrough on desktop — Difference in capturing attention vs. control creative — by company type



The performance of Dynamic Captions across mobile and desktop devices supports [previous behavioural research](#) undertaken in 2021 by Sharethrough, in which 72% of consumers (total cohort: 750) stated that they were more likely to watch a video on a mobile device if it had captions, with a corresponding 66% on desktop devices.

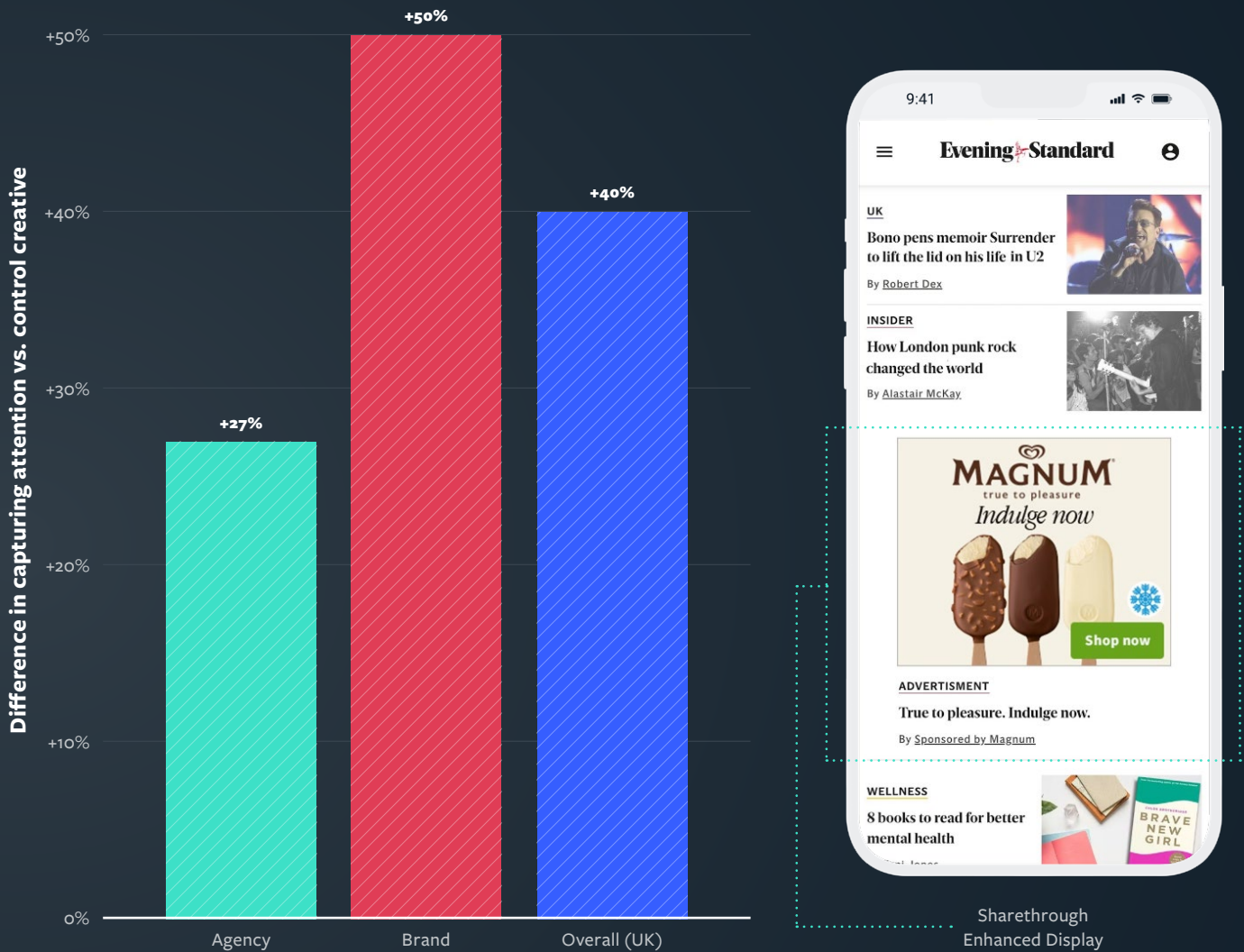
72% of consumers stated that they were more likely to watch a video on a mobile device if it had captions — **Sharethrough**

66% of consumers stated that they were more likely to watch a video on a desktop device if it had captions — **Sharethrough**

SHARETHROUGH ENHANCED DISPLAY

The Enhanced Display by Sharethrough creative, which comprised of a banner ad that includes a headline which matches the aesthetic of the site on which it is placed, outperformed the control creative in terms of capturing respondent attention across all surveyed company types and sizes when tested in a mobile format, and was found to be 40% more effective than the control overall. Enhanced Display was significantly more effective at capturing the attention of brand participants (+50%) than among agency peers (+27%).

Figure 12: Enhanced Display — Difference in capturing attention vs. control creative — by company type



+40%

effectiveness of Enhanced Display creative compared to control overall

+50%

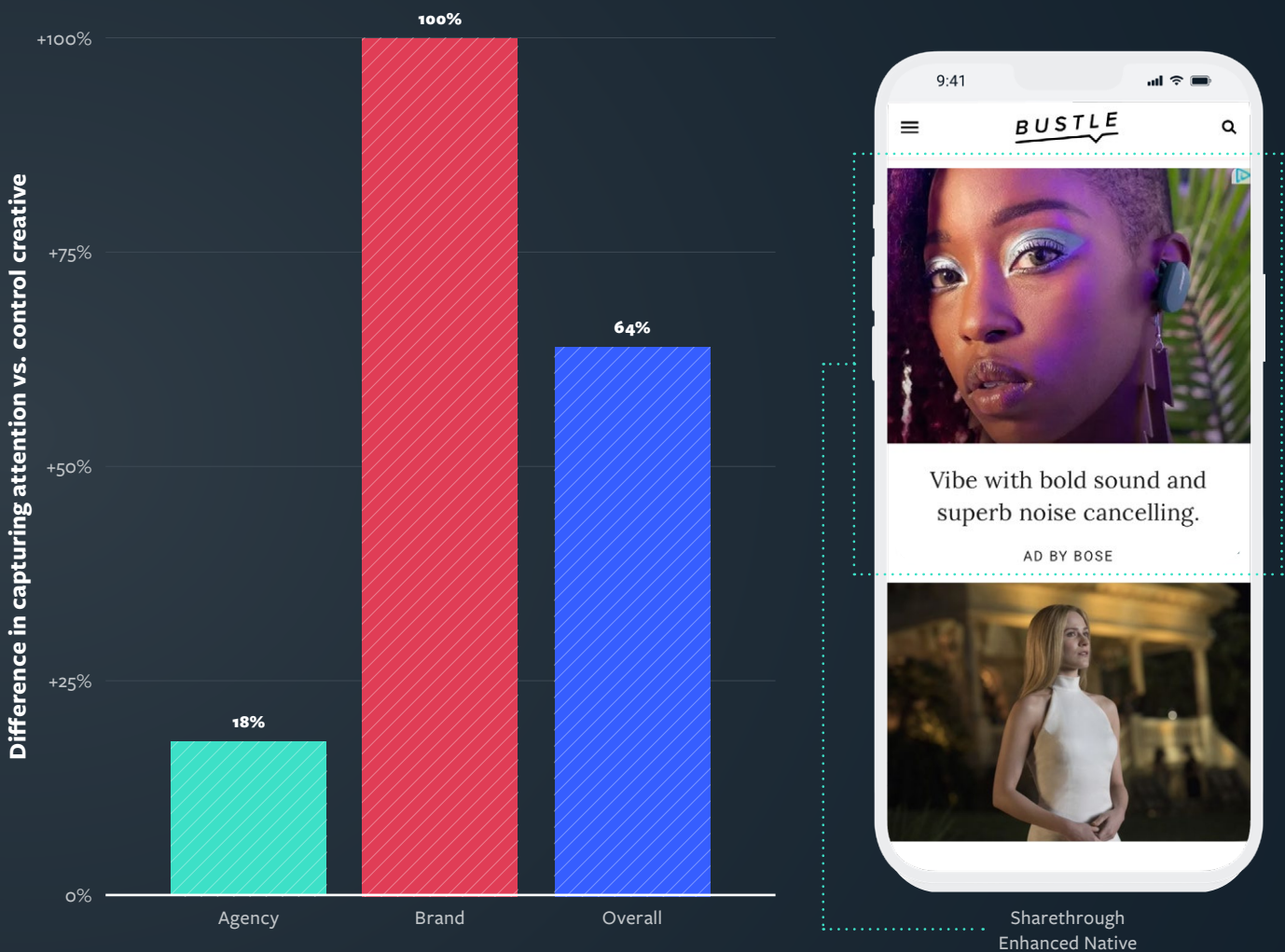
effectiveness of Enhanced Display creative at capturing the attention of brand participants compared to control overall

ENHANCED NATIVE

Similarly to Enhanced Display, Enhanced Native, which uses Sharethrough’s proprietary TrueTemplate technology to appropriately match the size, font, and colours of the surrounding site, was more effective at capturing attention than control creatives across all surveyed company types and sizes, capturing 64% more attention than the control creative overall. However, Enhanced Native was much more effective at capturing attention among brand respondents, capturing 100% more attention compared to the control creative, while agency respondents deemed it to be 18% more effective.

Moreover, Enhanced Native was significantly better at attracting attention among media buyers at small- (+100%) and medium-sized (+75%) businesses, compared to those at large firms (+6%).

Figure 13: Enhanced Native (mobile) — Difference in capturing attention vs. control creative — by company type

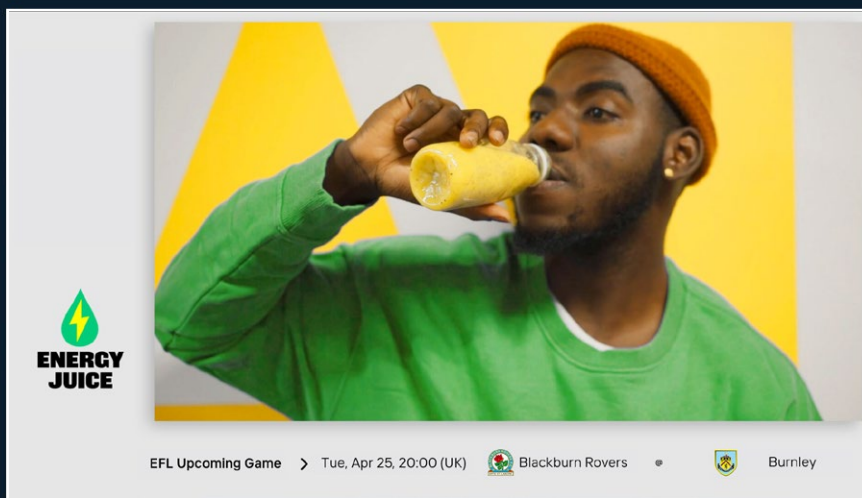


These findings support the 2015 study by Sharethrough and IPG Media Lab examining the performance of native ads relative to “traditional” display units. As well as generating more attention in eye-tracking assessments, native units registered an 18% higher delta for purchase intent relative to display ads, and a 9% higher lift for brand affinity.

Sharethrough CTV ad enhancements

Connected TV (CTV) has become an increasingly important aspect of marketers' strategies, with digital video now outperforming traditional linear TV in the United States according to forecasts. However, while a broad range of audiences are now consuming media via CTV, previous research undertaken by Sharethrough has suggested that **76% of consumers do not pay attention to TV ads**, with viewers instead prone to diverting to their phone, changing channel, or muting their television device. It is therefore important to assess methods of capturing and retaining attention during CTV ad pods in addition to base creative in order to potentially retain attention where otherwise it may be lost.

SHARETHROUGH CTV AD ENHANCEMENT — SPORTS TICKER:



Baseball



Basketball



Football



Hockey

Among scaled agencies, the most likely segment within the cohort to engage with CTV buys, the Sports Ticker ad enhancement was significantly more effective at capturing attention compared to the control creative. Firstly, among surveyed agency professionals, it performed 18% better than the control creative. Secondly, the Sports Ticker enhancement performed strongly at capturing the attention of media buyers at large companies, outperforming the control creative by 45%.

As well as capturing more attention in this study, Sharethrough have previously determined that viewers are 14% more likely to comprehend the messaging within an ad if supplemented with the inclusion of a Sports Ticker enhancement.

76%

of consumers do not pay attention to TV ads — **Sharethrough**

45%

the Sports Ticker enhancement performed strongly at capturing the attention of media buyers at large companies, outperforming the control creative by 45%

SHARETHROUGH CTV AD ENHANCEMENT — COUNTDOWN OVERLAY:



Similarly to the Sports Ticker ad enhancement, the [Countdown Overlay](#) ad enhancement was well-received among media buyers at medium- to large-sized firms, the segment most active in CTV ad buys, outperforming the control creative by 6% and 13%, respectively.

Leveraging a time-based call to action alongside the core creative is also likely to bolster the memorability of the start date of the promotion or product/service launch date. Sharethrough's research has previously asserted that viewers are 43% more likely to remember this start date with the inclusion of a countdown timer enhancement.

13%

the Countdown Overlay ad enhancement outperformed the control creative by 13% with large-sized firms

43%

increased likelihood of remembering promotion/launch start date with the inclusion of a Countdown Overlay — [Sharethrough](#)

WEATHER ENHANCEMENT



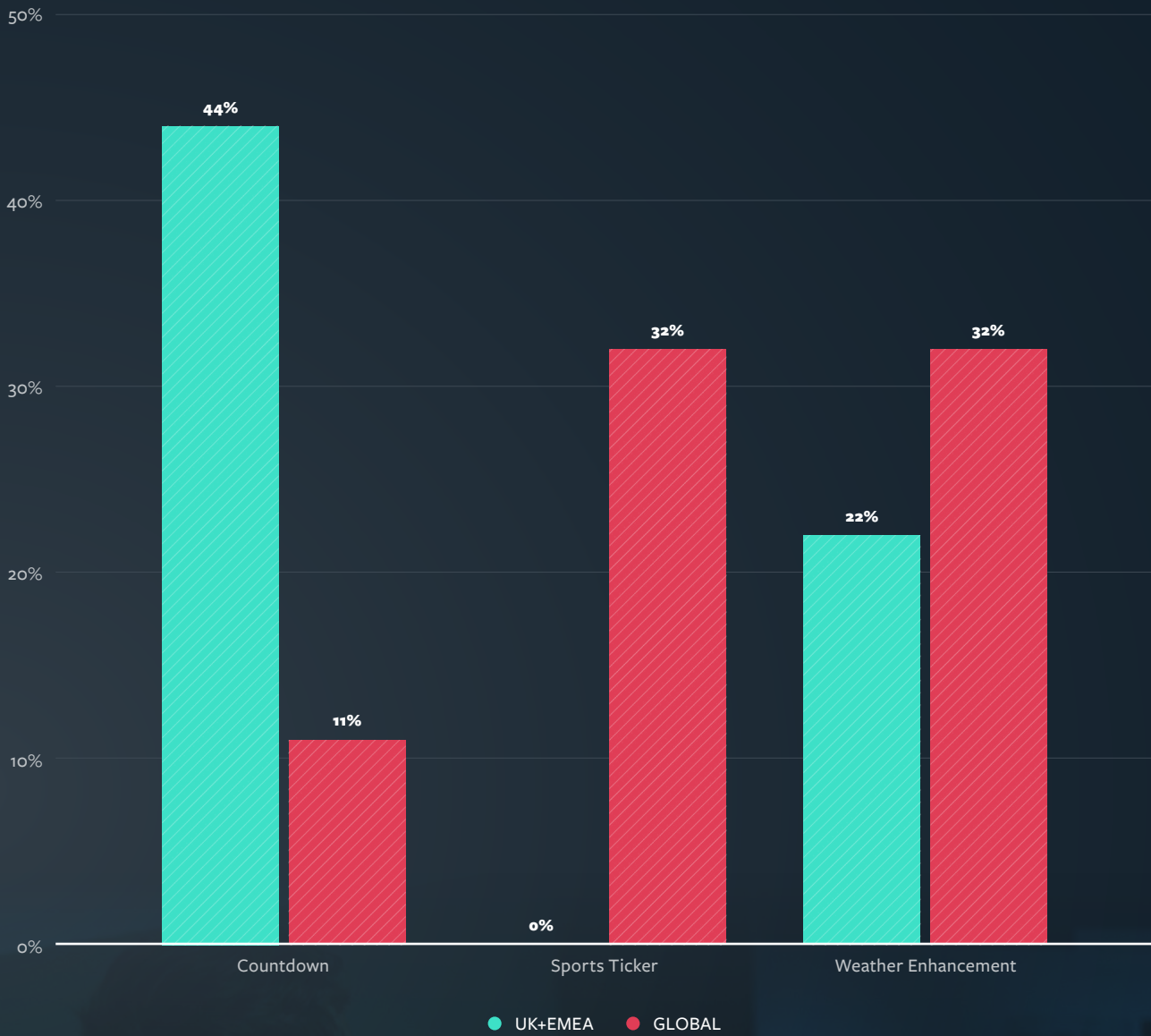
Despite being a relatively unfamiliar ad enhancement to the UK market, Weather Enhancement, in which local weather forecast relative to a viewer's location is presented alongside the TV creative, performed well among respondents at large (>500 employees) companies, capturing 32% more attention than the control creative.

Finally, where respondents indicated that they have additional operations outside of the UK, each of the surveyed CTV enhancements outperformed control creatives in terms of capturing attention. As these global firms are the most active participants in CTV buys currently, further education for the capabilities of CTV as a channel, particularly in capturing attention among consumers post-identifier deprecation is recommended to ensure the entire market can capitalise on these opportunities.

32%

more attention captured than the control creative among respondents at large companies

Figure 14: Sharethrough CTV enhancements — Difference in capturing attention vs. control creative — international firms



Acknowledgements

Sharethrough and ExchangeWire would like to take this opportunity to thank the surveyed UK media professionals.

SAMPLE & METHODOLOGY

The original quantitative research outlined in this report is derived from a survey of 100 media professionals working within a brand or agency, within the United Kingdom. Data was collected from 15th February 2023 to 17th February 2023.



ABOUT SHARETHROUGH

Sharethrough is one of the top global independent omnichannel ad exchanges. Driven by our conviction that advertising should be underpinned by respect and care, we believe taking a human-centric approach to advertising and monetisation is the key to a sustainable path forward for the independent and accessible internet to thrive. Advertisers and publishers leverage Sharethrough's unique technology to enhance every impression by rendering a higher-performing banner, video, CTV, or native ad that dynamically fits into any placement on any site. Our publisher partners benefit from directly-sourced demand, scale, and quality, prioritising their monetisation efforts while elevating performance.

For more information, please visit www.sharethrough.com



ABOUT EXCHANGEWIRE

ExchangeWire provides news and analysis on the business of media, marketing and commerce, with a specific focus on data and technology.

We offer actionable market intelligence on the trends and innovations that are shaping the media, marketing and commerce industries.

We're always interested in any technology and business-related news globally, and in particular across EMEA and APAC. Relevant companies are encouraged to get in touch. We're also interested in hearing from PR people working with companies in any of the areas named above.

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