



# Newsletter

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## 'ALPHA' – 'PAYING ATTENTION TO ADVERTISING', A MAJOR STEP

This is a journey rather than an outcome. Space and Polaris have just completed the first stage in the journey analysing paying attention to advertising; this was carried out based on a purely local study dedicated to declared attention. This is a significant and reassuring stage because it confirms much of the information already observed beyond our borders. Yet it is only one stage given that the subject of paying attention to advertising is itself complex.

### **In brief:**

- Space carried out an exclusive local study focused on the declarative side of paying attention, as a first phase towards a better awareness of the attention paid to advertising.
- Focusing on 11 categories of media, with the results given by format in digital media, the study shows that 1 respondent out of 6 declared that on average they are attentive to advertising, whatever the media.
- Afterwards, major differences were noted: as in other studies, the cinema proved to be the big winner in terms of declared attention, followed by the print media. Digital advertising scored significantly lower.
- Whatever one may think, the younger respondents declared that they were more attentive to advertising than the other respondents. On the contrary, the traditional channels of communication did not suffer any deficit among these 'digital natives'.
- A favourable perception of the integration of advertising in a media or regarding an advertising load considered acceptable significantly increases the degree of attention declared. Likewise, the media most frequently consumed (TV, radio, out of home) generate proportionately less attention than other more 'niche' media, such as the cinema.
- A characteristic of audio-visual media, the advertising break in programmes, is clearly not appreciated, but it does not have a uniform effect on attention.

## Attention, a 'fluid' reality

The approach adopted prior to this study on paying attention is called 'Alpha'. It is not merely a code name: by using it we are making a reference to the father of the memorisation coefficient, the late Armand Morgenzstern. In the 1970s, he also defined an 'Alpha' coefficient designating the degree of attention given on the first contact with an advertising message <sup>1</sup>. This concept was recently brought up to date in France by MyMedia. This agency carried out a vast survey into (declared) attention being paid to advertising in different media categories <sup>2</sup>.

Paying attention, not only to advertising, is a vast subject. It is a 'scarce and fluid commodity'<sup>3</sup> which is a good definition of this changing phenomenon. And it is also multifactorial: attention can be influenced by (among other things) location, mood, the content proposed – desired or otherwise, the associated activities or the platform, thus the context in general. In reality, it can be won or lost at a phenomenal speed <sup>4</sup>.



Moreover, active attention would be only a miniscule part of the cerebral activity. Indeed, our brains can process 400 billion bits of elementary data per second passively, while we are conscious of only 2000 bits per second <sup>5</sup>. This means that, in the passive mode (outside conscious functioning), a not insignificant number of elements can escape our attention.

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<sup>1</sup> Armand MORGENZSTERN (1973). *Durée de vie d'une annonce. Généralisation à l'ensemble des media*. IREP, pp.20-21.

<sup>2</sup> <https://www.mymedia.fr/my-media-cree-lindice-alpha-le-nouvel-indicateur-de-mesure-de-lattention/>

<sup>3</sup> Merja Myllylahti (2019): "Paying Attention to Attention: A Conceptual Framework for Studying News Reader Revenue Models Related to Platforms", *Digital Journalism*, p.2.

<sup>4</sup> "During an ad, we can jump from active viewing to active avoidance and back again 5 times" (all in a maximum of 20 seconds maximum...)

<https://www.screenforce.at/news/details/2020/07/02/dach-studie---not-all-rech-is-equal>

<sup>5</sup> According to information from MIT, cited by Brian SULLIVAN (2011) "Designing for awareness in the attention economy" (presentation), UPA Boston Conference.

Is it thus legitimate to capture attention via a declarative study? Some companies have done it (MyMedia in France, Magnetic Media in the United Kingdom <sup>6</sup>). Others refute the declarative as **an** unnatural construct <sup>7</sup>. This comment applies to all the surveys, given this... and yet, the habitual conditions of 'passive' collection of information on attention do not necessarily place the respondents in very real situations: downloading an app can be natural (as foreseen by the method applied by Professor Karen Nelson-Field), but then look at the videos in an environment controlled by the guidance of this app, is that finally more 'natural'? As sometimes is seen when using an activated eye-tracking system or even with Google Glass type spectacles (the Lumen Research method <sup>8</sup>)?

In our opinion, only a combination of methods and knowledge can lead to a truly good knowledge of the act of paying attention. Beginning with the declarative is therefore not out of place. This declarative section is one stage in a process: other approaches will have to follow. Confronted by a reality as diverse as attention, the measurement of it should rather be viewed as a path to follow. Here are some details of a first stage in this process.

## Basic elements of the declarative study

Our measurement of attention has been entrusted to the AQRate institute which has transformed it into an online survey, interrogating the members of their internetpanel.be from 5-14 June 2020. The average length of the survey was 11' 37". It covered a total of 1,993 respondents aged between 18-70 years of age, divided 50/50 French speakers and Dutch speakers. The sample was drawn to be strictly representative of the Belgian population in this age group.

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<sup>6</sup> Mike FLORENCE (2018) *The audience is not enough* (presentation)  
<https://darkroom.magnetic.media/original/42fb16c4c1cdb9296b57bfac8c64fbb0:5acab8bef65f45c5a7813c22e339d3d0/attention-please-mike-florence-presentation-spark-2018.pdf>

<sup>7</sup> Karen NELSON-FIELD & Erica RIEBE (2018) "How advertising attracts attention", *Admap* Vol 53, n°8, issue 607

<sup>8</sup> Lumen Research : <https://www.lumen-research.com/how#how-we-do-it>

In brief, the questionnaire was presented as follows:

Frequency of exposure to 11 channels:

- Offline: television channels, radio stations, newspapers, magazines, posters, cinema;
- Online: Broadcaster Video On Demand (BVOD), newbrand (presented as a 'digital version (application or internet site) of a print publication', generalist Internet site, video platform or social media. For the digital channels, we included a question on the screen they prefer when viewing: mobile device, large screen or whether they do not mind either way.



This frequency question served as a filter: respondents who stated that they had no exposure to a channel were not questioned about it in the rest of the questionnaire. The frequency question was not included regarding movement ('proxy' for exposure to posters): we considered that movement, even when limited, in fact concerned all of the respondents.

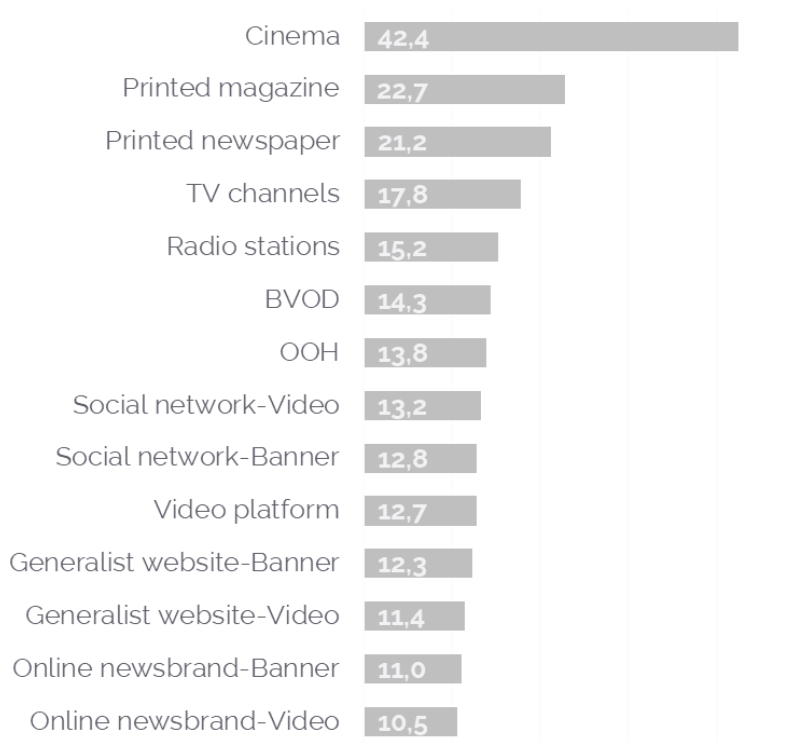
For respondents who declared a minimal exposure, 3 questions per channel:

- Perception of the advertising load: "In general, do you think that the advertisements are: far too numerous / somewhat too numerous / not too numerous / not at all numerous".
- Perception of the integration: "In general, do you consider that the advertisements are: not at all disturbing / not too disturbing / somewhat disturbing / very disturbing".
- Attention: question asked by channel: "In general, to what extent do you pay attention to advertisements: very attentive / rather attentive / not very attentive / not attentive at all". When it was relevant, the question was asked separately for banner ads and the video.

## 1 respondent out of 6 is attentive to advertising

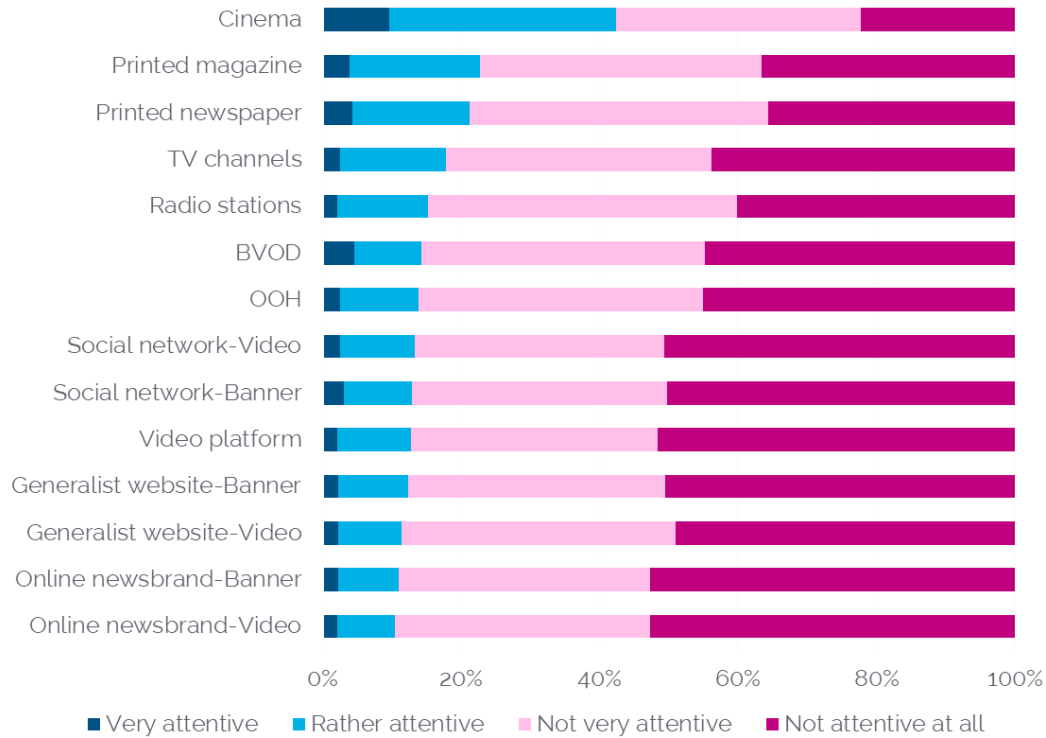
The averages for attentiveness are illustrated in the chart below: confirming the results of other studies, cinema advertising arouses the most attention among the respondents to the survey, followed by the printed media. Practically all the digital channels are found in the lower part of the classification. Regarding the digital media, only the VOD of local media (BVOD) stands out slightly from the group from which it is separated by the posters.

% attentive to ads all respondents



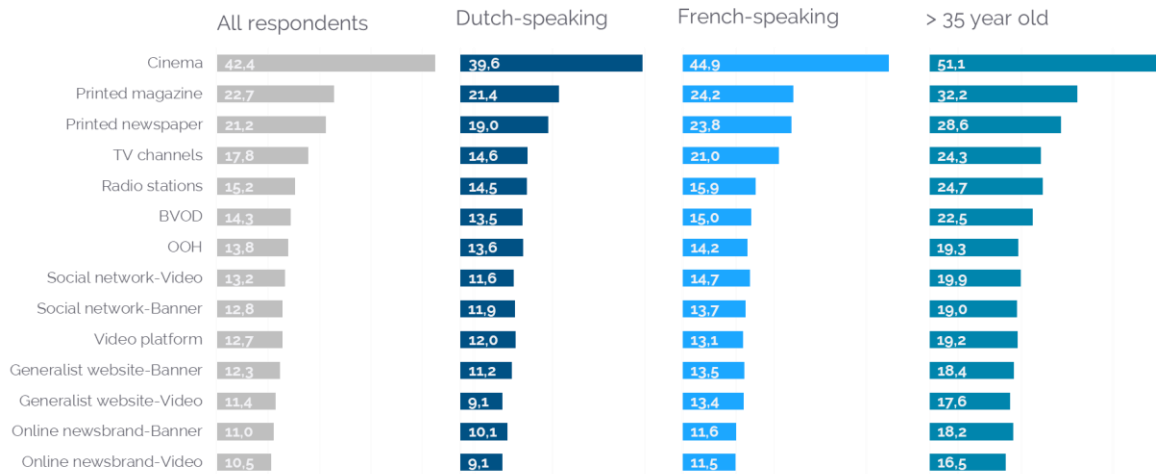
The 'attention' variable results from grouping together the criteria 'very attentive' and 'rather attentive'. The method details are given below: based on the variable 'very attentive', the classification could have been slightly different, but this method is rather marginal: an average slightly higher than 3%, with a minimum of 2% (radio) and a maximum higher than 9% (cinema).

Details attentiveness all respondents



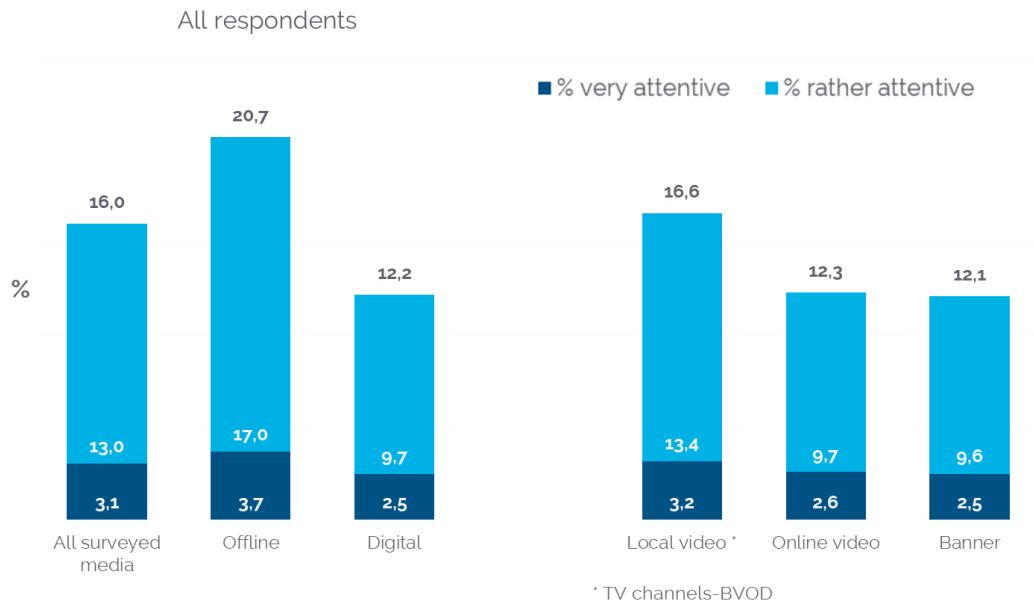
The attention average can obviously be analysed by population segment (cf. chart below). The differences by respondent's language are not significant. Among the under 35s, the average attention ratio is 45% higher than that noted for the respondents overall. The leading media for generating attention among these 'millennials' are the cinema, magazines and newspapers, i.e. exactly the same list as for all the respondents, whether over 35 or not.

**Attentiveness by (broad) demographic**



The average attention ratio is 16% for all channels surveyed overall. Yet, it is rather different depending on whether you are talking of 'off' or 'online': practically 21% for the former and slightly more than 12% for the latter. Contrary to what one might have expected, the average scores for banner ads and digital video are practically identical.

**Reported attentiveness: by media category/format**

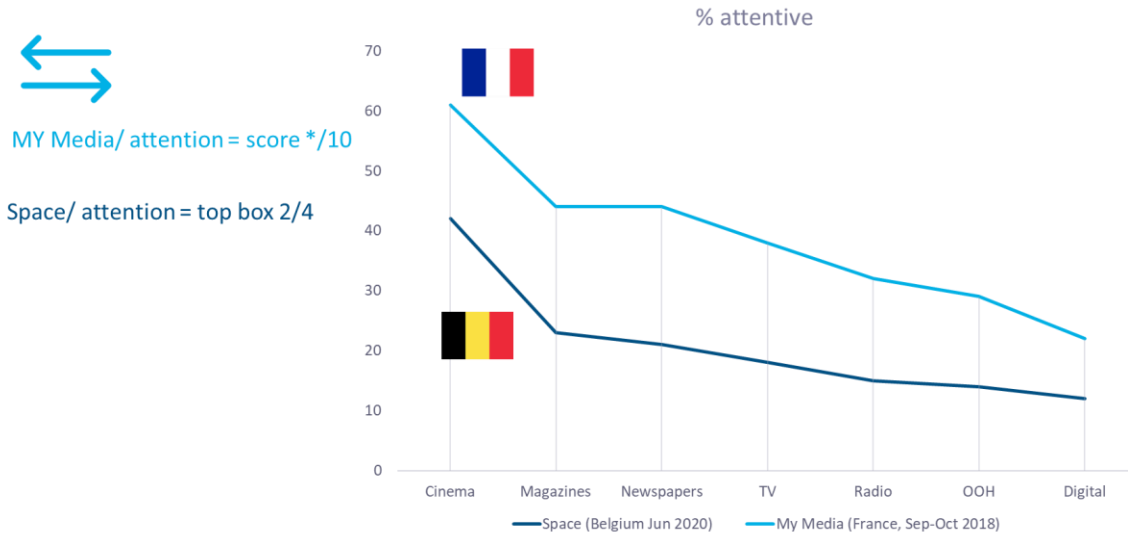






Between the measurements carried out in France following a declarative method<sup>9</sup> and our survey, the average attention coefficients demonstrate remarkable parallels. One of the reasons that explain the difference in absolute figures relates to the scales used by the respective questionnaires: 1 note out of 10 for MyMedia in France, and a grid of options limited to 4 modes for our survey.

Similar patterns to those measured in France



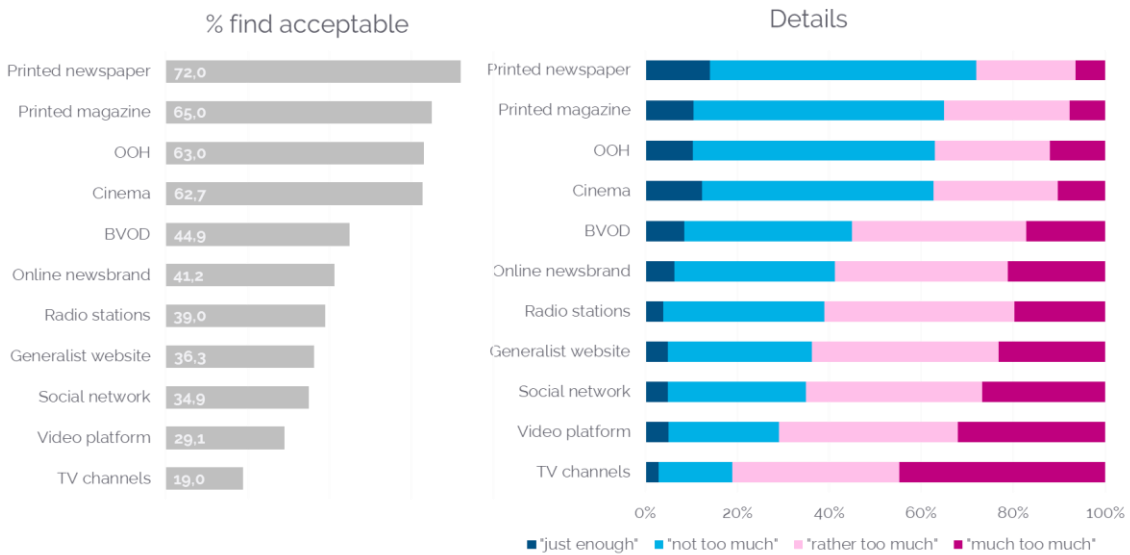
<sup>9</sup> <https://www.mymedia.fr/my-media-cree-lindice-alpha-le-nouvel-indicateur-de-mesure-de-lattention/>

## Perception of advertising and attention

The perception of the advertising load gives rise to a different classification, very favourable to the printed press and to out of home, but distinctly less so regarding audio visual: TV channels and video platforms, as well as social networks: a probable effect of the interruption of the user's experience, a characteristic of these channels.

### Clutter perception, all respondents

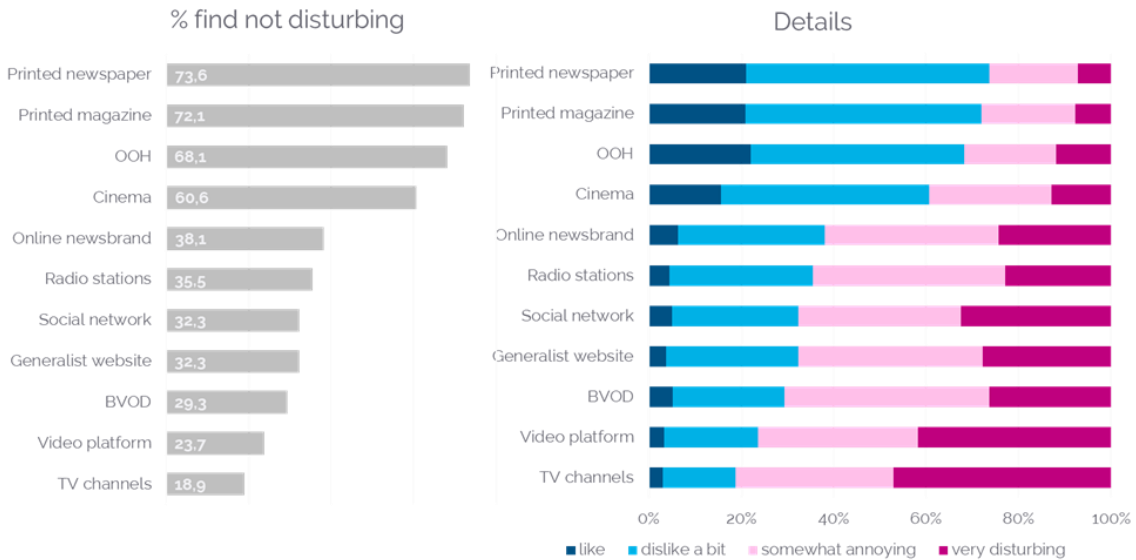
*Generally speaking, do you find that there is much too much ads/rather too much/ not too much/ just enough when it comes to ads in this medium ?*



The data relating to the integration of advertising presents in an identical manner overall. However, it was noted that a higher proportion of respondents considered the integration of advertising in the press and 'out of home' was optimal: thus, only 14% found the advertisements 'far too numerous' in the daily press, and 21% considered them 'not at all disturbing', for the magazines, 10.5% found the magazine advertising 'far too numerous', but 21% (the double) perceived them to be 'not at all disturbing'. Finally, posters: 22% considered them 'not at all disturbing, compared with 10% who found the advertisements were 'far too numerous'.

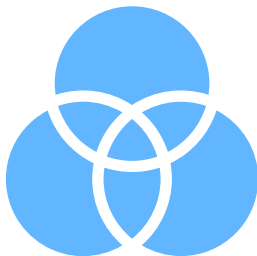
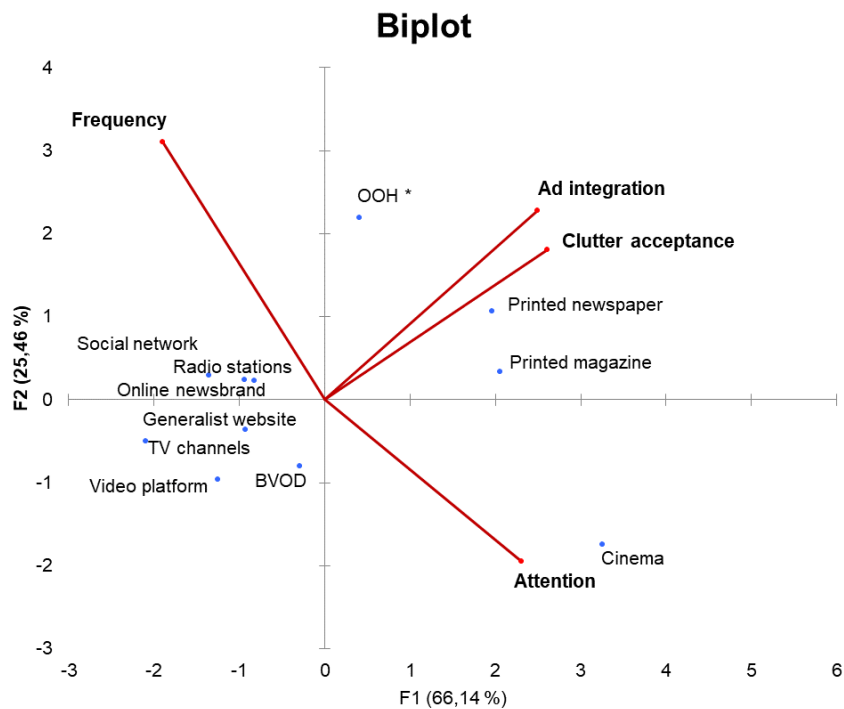
## Ads integration, all respondents

Generally speaking, do you find ads in this medium very disturbing, somewhat annoying, not too annoying, not disturbing at all ?



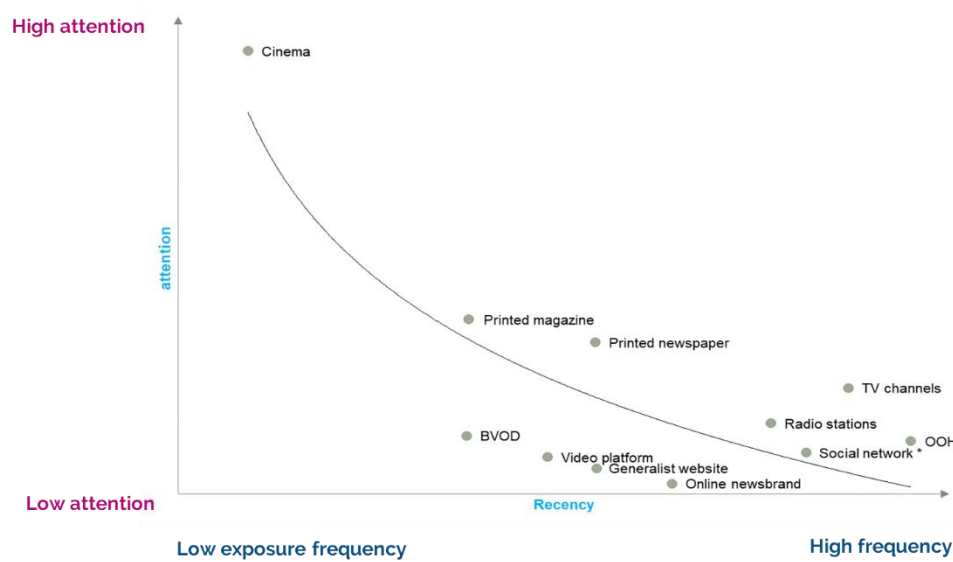
Media consumption and perception of advertising are far more determining variables regarding attention than the respondents' socio-demographic profile. This is what results from the statistical analysis of the raw data generated by the survey. The result of analysis of the principle components, the biplot below shows us that, in general, the declared frequency of consumption of the communications channels studied is inversely proportional to the average measure of attention. This relationship is strong, but not strictly linear.

With regard to the perception of integration and the evaluation of advertising clutter, they rather play the role of facilitator, yet not totally, in relation to the 'attention' variable. The position of the press media indicates that they are perceived rather favourably in the clutter and integration, the position of posters has good results for the frequency of exposure and perception of the advertising. As for the cinema, its position is optimal regarding attention.



More specifically, the relationship between frequency and attention is illustrated in the chart below: the cinema generates very spaced out contacts, but they are characterised by a high level of attention, in contrast to the mass media which play more precisely on frequency.

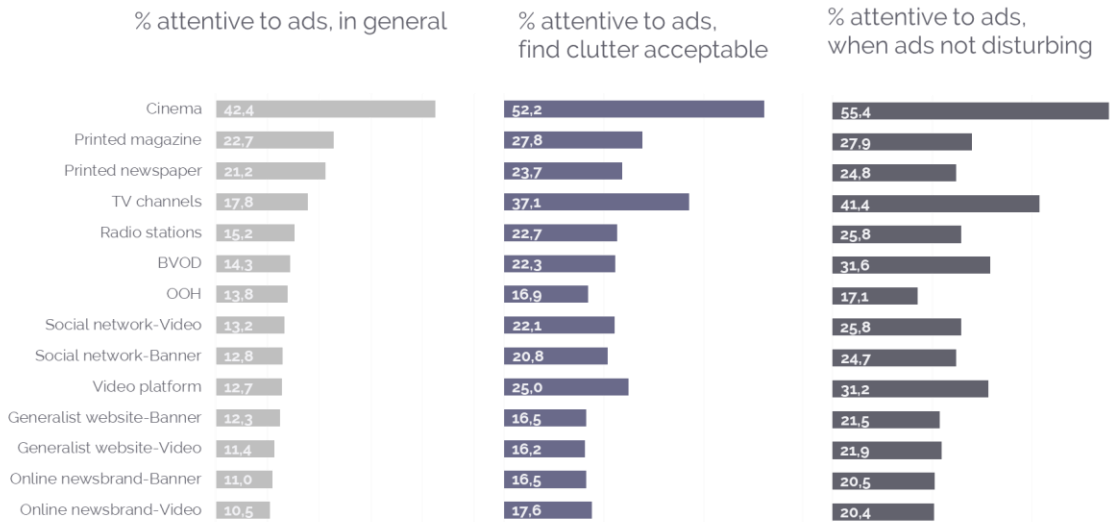
Generally reverse relationship frequency-attention



Among the respondents who considered that the advertising load was acceptable and/or those who thought that the advertising integration was correct, the declared attention for the media category increases significantly. The optimisation of attention is particularly strong for audio-visual, whether it be offline (classic TV) or online (BVOD or video platform): the ratios can then be multiplied by two.



Attention optimized when channel is well perceived

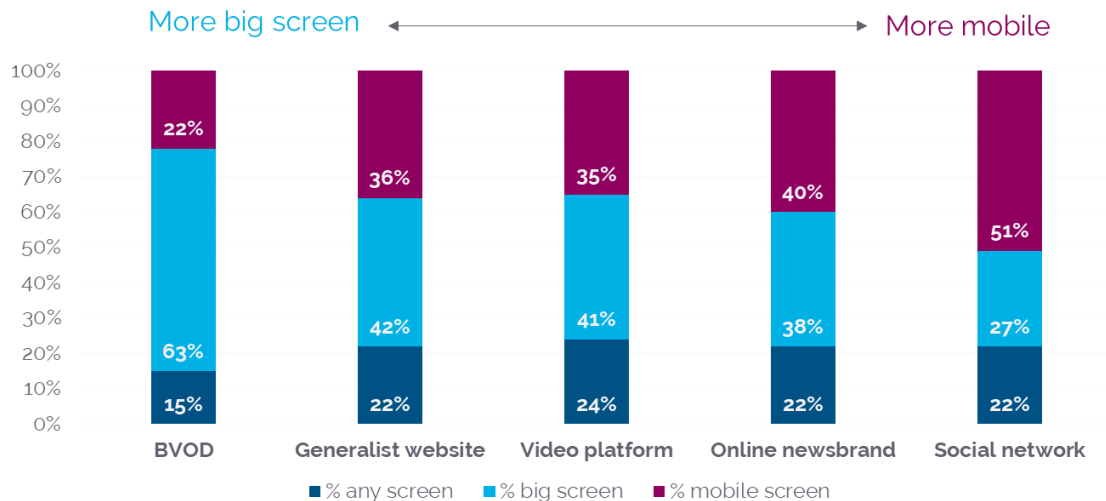


Screens: comfort is most important

The question concerning screen preferences show marked differences: video from local broadcasters were viewed preferably on a big screen: computer or, without a doubt, a television screen was preferred. Probably this would be for viewing sessions of longer duration which require a certain level of comfort. In contrast, for checking activity on social networks, this is more often done on a mobile phone. On the other hand, these distinct preferences do not translate into different results regarding attention.



## Screen preferences vary by online channel But no influence on attention levels



### 5 lessons learned regarding attention

With a difference of more than 8 points, **the offline media offer higher attention values** than their digital equivalents. This difference confirms the lessons learned in the other surveys, principally those carried out abroad. Whether they were declarative (MyMedia, Magnetic, see above) or gathered in the passive mode (Karen-Nelson Field, cf supra, Lumen Research <sup>10</sup> or Brightfish <sup>11</sup>), a good number of sources confirm a relative lack of attention among the digital media.

Appreciated for a controlled advertising clutter and a harmonious coexistence between advertising and editorial content, the offer of the **print media** presents a solid alternative; all the more so because their strength is not decreasing – quite the opposite – among the 'digital natives'.

The characteristic interruption in the media flow, mainly audio-visual, is obviously not appreciated. A lesser appreciation of the advertising clutter does not, however, ruin the ability to generate attention: this is typically the case for

<sup>10</sup> <https://www.lumen-research.com/blog?offset=1576846852485>

<sup>11</sup> Brightfish (2018) "From viewable to viewed": <https://effectiveviews.be/assets/white-paper.pdf>

television, which had bad notes in terms of advertising load, but generates more attention than any other online video offer. In brief, there is a **complex relationship between intrusiveness and attention**.

As in the MyMedia Alpha survey, the **differences** in attention are **minimal between the banner ads and online video**. This was somewhat unexpected.

The good performances by television and local broadcaster sites show the real **attractiveness of what comes from 'here'** compared with the offer from video platforms such as YouTube, with a higher audience potential but with a lower level of attention.

### “From alpha to omega”<sup>12</sup>: the follow on

As has already been indicated, the current survey is but a stage in a broader process. The ideal would be to enrich the declarative part with data coming from a passive collection of information, typical of neuromarketing. Preferably, this should be as natural as possible (cf our comments expressed above) and taking into account all types of perception, including the sound...

We still have a way to go before acquiring complete, balanced and local knowledge on the attention paid to advertising. We are currently at stage two of the process as illustrated below:



<sup>12</sup> “Alpha” is the first letter of the Greek alphabet; “omega” is the last letter.