Attention Metrics Ecosystem 2024
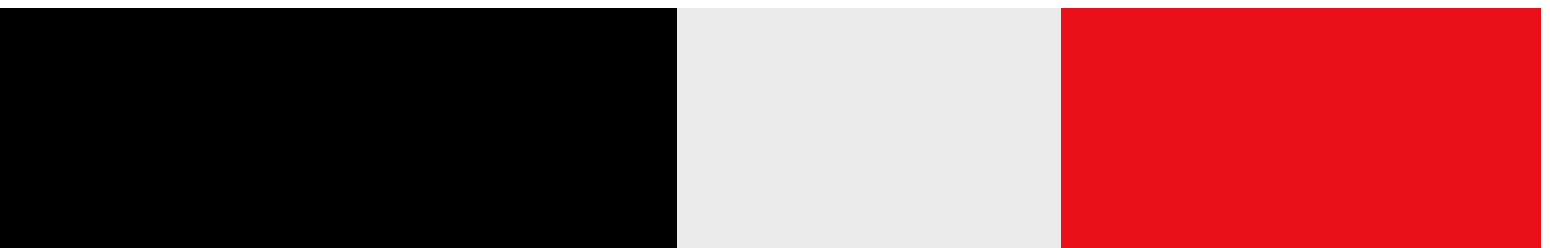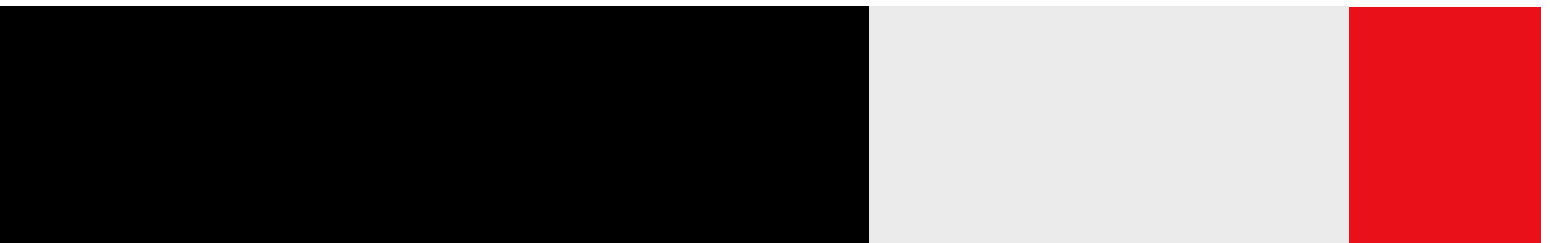
Adoption Picks Up Steam Despite Lack of Standardization as Attention Providers Expand Offerings

Contributors: Rahul Chadha, Donte Gibson, Vladimir Hanzlik, Tracy Tang, Matt Torpey, Zia Daniell Wigder, Max Willens, Yoram Wurmser, Ali Young
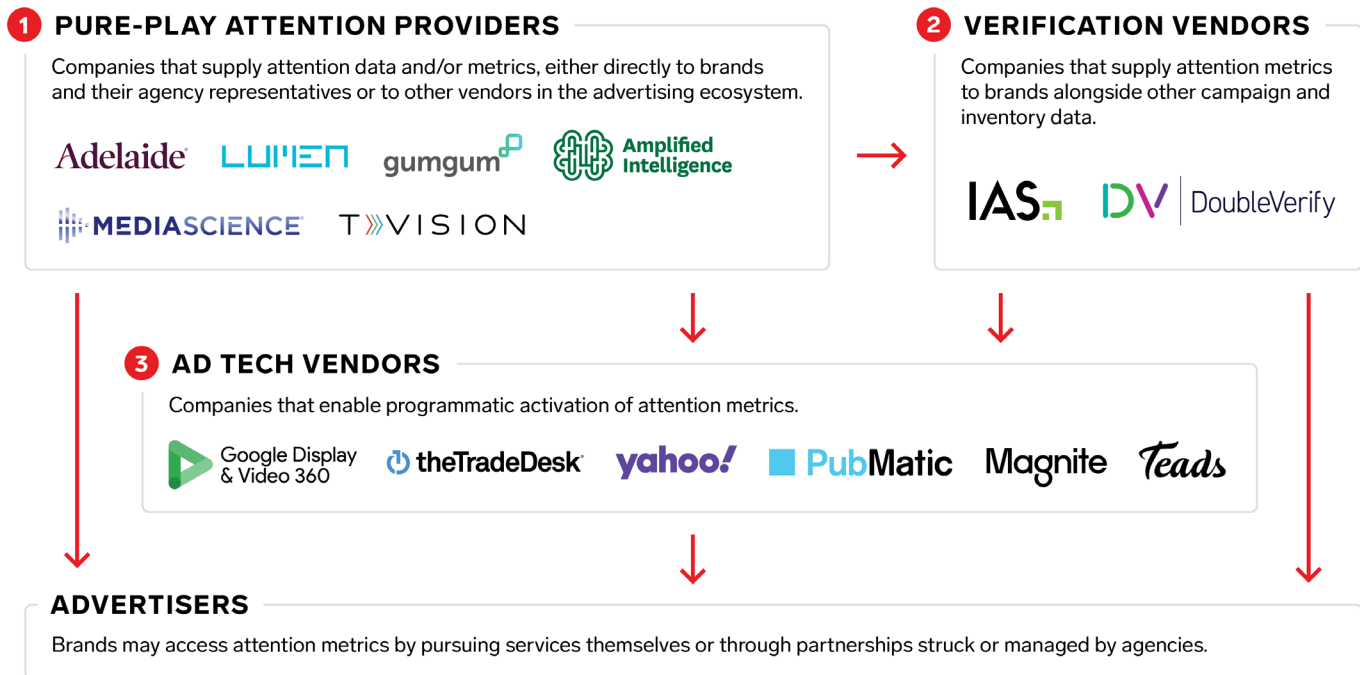
Contents

Attention Metrics Ecosystem 2024

- **Attention goes beyond viewability.** By assessing whether a consumer noticed and absorbed a message, attention goes further toward measuring outcomes than viewability alone.

- **Attention metrics typically incorporate human- and impression-centered data.** Biometric and survey data measure attention directly, requiring consenting human subjects and special equipment. Contextual data about impressions can be collected in real time and at scale, but it only measures indirect proxies for attention.

- **Attention metrics can be used throughout the campaign life cycle.** From channel, platform, and format selection to post-campaign measurement, attention metrics can help advertisers gauge media quality, minimize waste, and facilitate performance.

- **Advertisers rely on three main vendor groups for attention metrics.** Pure-play attention providers, verification vendors, and ad tech vendors each play a role in the complicated web of partnerships that facilitate the use of attention.

Advertisers Rely on 3 Main Vendor Groups for Attention Metrics

1　PURE-PLAY ATTENTION PROVIDERS

Companies that supply attention data and/or metrics, either directly to brands and their agency representatives or to other vendors in the advertising ecosystem.

Adelaide　LUMEN　gumgum　Amplified Intelligence

MEDIASCIENCE　T·VISION

2　VERIFICATION VENDORS

Companies that supply attention metrics to brands alongside other campaign and inventory data.

IAS　DV | DoubleVerify

3　AD TECH VENDORS

Companies that enable programmatic activation of attention metrics.

Google Display & Video 360　theTradeDesk　yahoo!　PubMatic　Magnite　Teads

ADVERTISERS

Brands may access attention metrics by pursuing services themselves or through partnerships struck or managed by agencies.

Note: not an exhaustive list of relevant players; not all attention providers have partnerships with all/any verification and/or ad tech vendors listed; Playground xyz absorbed into GumGum's brand as of August 2024
Source: EMARKETER Analysis, Sep 2024

Attention metrics go beyond viewability to measure the likelihood that an ad was noticed and taken in

For about a decade, viewability was the "it" standard for ad measurement. Viewability established a quality baseline with industrywide recognition. If the consumer can't see an ad, how could it possibly drive results? Unless it's viewable, an ad is a waste of precious resources.

An impression is viewable if at least 50% of the ad's pixels are visible to the end user for at least 1 continuous second for static creative or 2 continuous seconds for video, per Media Rating Council (MRC) standards.

Now, attention is emerging as viewability's successor. Viewability metrics are still important to validate that a consumer had the opportunity to see an ad. But attention metrics gauge whether the consumer noticed and absorbed the message. Attention is not an outcome in and of itself, but measuring attention gets advertisers one step closer to measuring outcomes.

Advertisers are paying more attention to attention. Nearly half (47%) of buy-side decision-makers expected their organization to focus somewhat or significantly more on attention metrics in 2024, up from just over a third (36%) a year prior, according to the Interactive Advertising Bureau (IAB).

Attention Metrics Have Risen in Advertisers' List of Priorities
% of US buy-side decision-makers, Nov 2022 vs. Nov 2023

Q: Do you expect to focus more, less, or the same amount of time and/or resources [next year] on [attention metrics]?

	Somewhat/significantly more	Same	Somewhat/significantly less	N/A
Nov 2022	36%	35%	5%	24%
Nov 2023	47%	30%	4%	19%
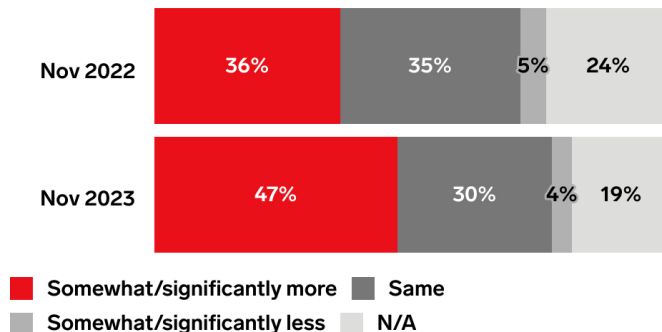
Note: Nov 2022 n=223; Nov 2023 n=203
Source: Interactive Advertising Bureau (IAB), "2023 Outlook Survey," Nov 17, 2022; IAB, "2024 Outlook: A Snapshot into Ad Spend, Opportunities, and Strategies for Growth," Nov 30, 2023

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Although adoption is on the rise, attention still has a few major hurdles. As with all innovative metrics, advertisers are looking for proof that attention provides enough incremental value to justify the cost. But attention's progress is further hindered by:

- **Methodological complexity,** which makes it challenging to understand what goes into attention metrics, let alone compare offerings from different providers.

- **A lack of standardization.** With viewability, an impression either meets the MRC's criteria for viewability or it doesn't. In contrast, attention has different levels and far more variables to consider, so a consensus definition remains elusive.

Attention metrics rely on data from humans and impressions

Attention metrics are formulated using a variety of data inputs, which can be grouped into three categories: biometric data, survey data, and contextual data.

The 3 Categories of Input Data for Attention Metrics

BIOMETRIC DATA	SURVEY DATA	CONTEXTUAL DATA
Physiological indicators of attention	Measures of message absorption and consumer sentiment	Proxy signals of attention
• Eye tracking • Facial coding • Brain activity • Heart rate	• Ad recall • Brand lift • Emotional response	• Dwell time • Scroll speed • Cursor location • Completion rate
HUMAN-CENTERED		IMPRESSION-CENTERED

Note: not an exhaustive list of examples of each type of input data; not all attention metrics providers use data from every category or all listed examples
Source: EMARKETER Analysis, Sep 2024

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Biometric and survey data are direct measures of attention. Both require consenting human subjects, and biometric data entails special, often expensive equipment and experimental setups. This human-centered data is usually sourced from panels and fed into a model that informs a provider's attention metrics.

Contextual data offers indirect, or proxy, measures of attention. When a user interacts with an ad or surrounding content, they drop virtual breadcrumbs that suggest their level of engagement. This impression-centered data is captured via tags or other software integrations. Unlike biometric and survey data, contextual data can be collected in real time and at scale.

Attention providers use similar ingredients but different recipes

Not every attention provider uses input data from every category, but most use some combination of human- and impression-centered data.

Each end product is unique. Given the same inputs, two attention providers can arrive at different conclusions depending on how things are weighted by machine learning models and how they approach biometric and survey data.

Standard-setting bodies won't dictate which inputs to use—or in what quantities. Instead, the MRC and the IAB's Attention Task Force are collaborating to establish a framework for auditing attention products to ensure they meet the minimum technological requirements and measure what they claim to measure. Both organizations, along with the Advertising Research Foundation (ARF), are also educating advertisers on best practices and guiding the industry as attention metrics evolve.

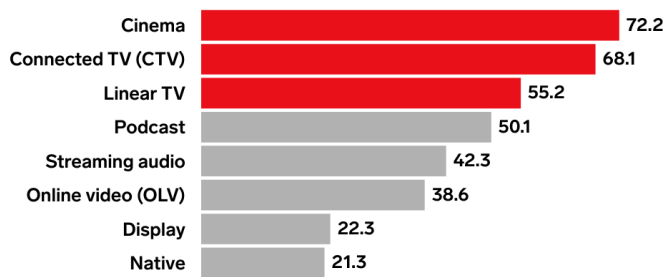## Attention metrics can inform campaigns before and after launch

The core value proposition of attention metrics is to minimize waste and facilitate performance. Attention metrics can be applied throughout the campaign life cycle to achieve these goals.

Planning-stage applications focus investment proactively

Attention metrics can be incorporated into planning tools. Advertisers can use attention metrics as benchmarks to inform channel, platform, and format selection. For example, Adelaide's attention unit (AU) metric assesses the probability of a placement capturing attention and driving outcomes on a scale of 0 to 100.

Large-Screen Video Ad Formats Are More Likely to Grab Attention
worldwide attention units (AU), by channel, Q2 2024

Channel	AU
Cinema	72.2
Connected TV (CTV)	68.1
Linear TV	55.2
Podcast	50.1
Streaming audio	42.3
Online video (OLV)	38.6
Display	22.3
Native	21.3

Note: Adelaide's AU metric scores ad placements on a scale of 0 to 100 based on how likely they are to effectively capture attention and generate impactful outcomes across channels and platforms; data represents activity among Adelaide clients, broader industry metrics may vary
Source: Adelaide, June 30, 2024

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PRO+ subscribers have access to 400+ Industry KPIs. For additional attention metrics, including historical figures and data by platform, **click here**.

But attention is still just one piece of the planning puzzle. Although cinema ranks highly on AU, the movie-going audience is small relative to that of digital channels and frequency is limited. Depending on the campaign objective, these attention benchmarks could lead to different strategic decisions:

- A splashy campaign to promote a new store opening might benefit from a local cinema push for maximum impact.

- An always-on branding campaign might allocate more budget to lower AU channels with higher cumulative reach and lower costs per impression (CPMs).

Many attention providers offer planning tools, and some have partnered with agencies to make attention metrics available in their in-house planning tools.

Attention metrics can also be used to optimize creative. With its deep roots in audience research, attention can be used to identify the highest-performing creative concepts and executions. This is a resource-intensive use case best reserved for high-profile campaigns with long lead times or where A/B or multivariate testing isn't available. It's also worth noting that even the best creative can only grab attention given the right context.

Attention metrics can also refine programmatic bidding in real time

Attention metrics can be layered onto data-driven media buying strategies. This can help steer display ad dollars toward high-quality, high-impact placements. Programmatic advertisers can opt for:

- Private marketplaces (PMPs) of curated high-attention media

- Pre-bid segments that filter out placements below a chosen attention threshold

- Custom bidding algorithms that dynamically adjust bids based on attention signals

- Dashboards with real-time attention metrics to inform manual in-flight campaign adjustments

Media buying applications of attention metrics are becoming more accessible as attention providers integrate with more ad tech vendors. With an immediate and potentially transformational impact, this use case is gaining steam.

Post-campaign attention measurement has higher long-term impact

Attention metrics can be included in post-campaign reporting. Like any retroactive measurement solution, this is primarily useful for verifying the quality of a placement or buy and/or informing strategy for subsequent campaigns.

Attention metrics can also be fed into statistical analyses of media and marketing investment. Econometrics or media mix modeling (MMM) can incorporate attention metrics to enhance training data and strengthen optimization recommendations, especially for fragmented digital channels. Despite improvements in automating data collection, MMM can be resource intensive, and it takes time for the payoff to materialize. But long term, the benefit of the big picture can't be understated.

How should advertisers prioritize attention metrics use cases?

We have categorized the aforementioned use cases into four groups based on the ease of implementation and the expected impact on advertisers' strategies. Keeping in mind that business impact varies by advertiser and campaign, and ease of implementation varies by attention provider, our recommendations for each of the four groups are as follows:

Implement today for high-impact, easy-to-implement use cases:

- Planning tools

- Media buying

Explore opportunities to assess feasibility at your organization for high-impact, more difficult to implement use cases:
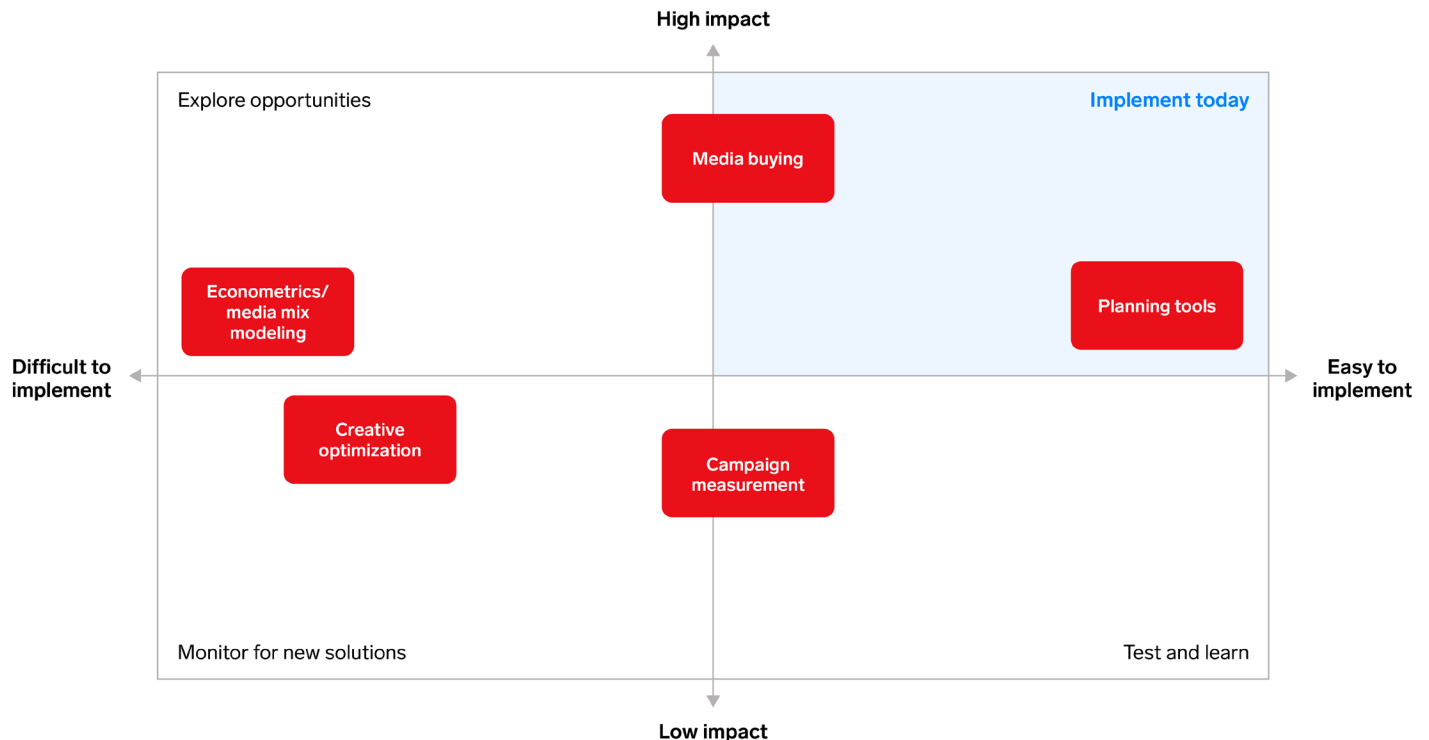
- Econometrics and MMM

Test and learn lower-impact, easy-to-implement use cases:

- Campaign measurement

Seek and monitor new solutions for lower-impact, more difficult to implement use cases:

- Creative optimization

How Should Advertisers Prioritize Attention Metrics Use Cases?

High impact

Explore opportunities

Implement today

Media buying

Econometrics/
media mix
modeling

Planning tools

Difficult to implement

Easy to implement

Creative
optimization

Campaign
measurement

Monitor for new solutions

Test and learn

Low impact

Note: only select use cases shown; ease of implementation varies depending on attention provider
Source: EMARKETER Analysis, Sep 2024

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Advertisers can work directly with attention providers and activate programmatically via ad tech vendors

There are a handful of big names in the attention space and a complicated web of partnerships that support advertiser activation of attention metrics. But there are three main vendor groups that operate in the space:

- **Pure-play attention providers.** These companies offer attention metrics products directly to advertisers. Some of them make their attention metrics available for programmatic activation through ad tech vendors without requiring a direct contract with the advertiser. Some also supply raw biometric attention data to verification vendors.

- **Verification vendors.** These companies supply brands with attention metrics alongside other campaign and inventory data, including viewability and brand safety. They rely mostly on contextual attention data gathered through their tags.

- **Ad tech vendors.** These demand-side platforms (DSPs) and sell-side platforms don't contribute their own attention metrics. Instead, they make certain pure-play attention providers' metrics available through PMPs, custom algorithms, and/or pre-bid segments.

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Adelaide   LUMEN   gumgum   Amplified Intelligence

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Source: EMARKETER Analysis, Sep 2024

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Agencies may act as an additional intermediary between any of these vendor groups and brands. Some agencies have enterprisewide agreements with attention providers that allow clients to access and use attention metrics at no additional cost.

Pure-play attention providers collectively offer products that span all use cases

There are a handful of major pure-play attention providers that advertisers are sure to encounter when assessing attention metrics offerings. Here are some examples:

- **Adelaide.** Adelaide's AU metric is distinguished by its emphasis on predicting outcomes. In addition to placement quality signals and eye-tracking data from TVision and Realeyes, AU models are routinely trained on full-funnel outcome data including brand awareness and purchase data. Advertisers can set up campaign measurement and access real-time data from Adelaide's dashboard, and/or benchmark and plan using its Flight Control tool. They can also activate programmatically through over a dozen platforms, including Google's Display & Video 360, The Trade Desk, and Yahoo.

- **Amplified Intelligence.** Amplified Intelligence is an Australia-based provider touting proprietary attention data from over 100,000 human subjects from 15 countries. Its self-serve platform, attentionPROVE, lets marketers generate and apply their own tags to get live attention insights at the format, campaign, and channel levels. It has partnered with Yahoo DSP to bring attentionPROVE to Yahoo's Australia-based buyers and provides attention data to clients of Chalice Custom Algorithms.

- **GumGum.** GumGum, a contextual intelligence platform, acquired attention provider Playground xyz in 2021. GumGum's Attention Time metric models eye-tracking data to predict how many seconds an ad will be looked at. Advertisers can optimize their programmatic buys based on attention through GumGum and measure attention across digital channels through its Attention Intelligence Platform.

- **Lumen.** Lumen's attention model is trained on over 10 years' worth of eye-tracking data from more than 650,000 sessions and hundreds of billions of impressions. The Lumen Attention Measurement and Planning Platform (LAMP) offers campaign measurement that estimates the "attentive seconds" captured by each impression, which can be referenced against cost or outcomes data. Lumen also offers custom bidding and creative optimization algorithms that can be embedded into an advertiser's DSP of choice. And it has partnered with Integral Ad Science (IAS) to supply eye-tracking data to IAS's attention product.

- **MediaScience.** MediaScience focuses on custom research, using a variety of controlled experimental approaches to attention, emotional response, and brand recall. While there's no dashboard or programmatic activation component to its offering, MediaScience has more flexibility to design studies that best fit an advertiser's specific needs.

- **TVision.** TVision provides eyes-on-screen attention data for connected TV (CTV) and linear TV from its panel of 5,000 households with 13,000 collective residents. It uses automated content recognition to map attention data back to individual creative assets—not just for clients, but for any brand, making it a valuable tool for competitive intelligence. Attention metrics that score ads and campaigns relative to industry averages are available through its dashboard offerings. TVision also offers attention-based creative scoring that compares ads to others in the same pod. TVision supplies its eye-tracking data to DoubleVerify (DV).

Verification vendors primarily satisfy the campaign measurement use case

- **DoubleVerify.** DV's Authentic Attention—which has the only MRC-accredited attention methodology as of this writing—draws on exposure and engagement data to give insight into performance relative to industry benchmarks. If an advertiser already works with DV for ad verification or brand safety, measuring attention requires no additional setup, as the data is generated from DV's tags. DV clients get a weekly summary report with high-level attention insights free of charge, as well as dashboard activation for an additional fee. DV also offers pre-bid segments that can be integrated with an advertiser's DSP of choice.

- **Integral Ad Science.** IAS's Quality Attention model combines contextual and outcome data from its own tags and pixels with eye-tracking data from Lumen to produce attention scores that correlate to business results. Advertisers must work directly with IAS to activate, but like DV's product, it's quite easy to turn on for existing IAS customers. IAS has initiated an MRC audit.

What should advertisers consider before implementing attention metrics?

Approach vendor selection with specific use cases in mind

- **Identify priority use cases upfront.** This will help pare down the number of vendors and products worth considering. Use cases should align with key business objectives and campaign goals. If several use cases are of interest, it may be beneficial to select a vendor that can cater to all of them to allow for apples-to-apples comparisons as appropriate.

- **Take advantage of industry resources.** The IAB Attention Task Force has developed a comprehensive list of request for information (RFI) questions spanning methodology, product capabilities, pricing details, and more. This simplifies the information gathering process, making it easier to compare each vendor to your business needs—and to each other.

- **Define success in advance and have a measurement plan.** Without baseline performance data or some other controlled experiment, it's impossible to discern whether attention metrics have a positive influence on outcomes. Advertisers should set realistic and measurable targets for improvement, per the IAB's attention readiness checklist.

Beware of attention pitfalls and misconceptions

- **Be mindful of over-optimizing for attention.** It's a metric that can be correlated to outcomes, not an outcome in and of itself. More attention is not always better. And if every impression must capture someone's undivided attention, advertisers will land in hot water with consumers who feel held captive by inescapable brand messaging.

- **Don't mistake attention for attribution.** Attention doesn't solve for signal loss, but it can help fill in gaps that grow wider as privacy initiatives redefine how advertisers can use consumer data. Optimize around attention when optimizing based on outcomes isn't an option due to signal loss or in cases where attribution methods are lacking (e.g., upper-funnel channels like TV).

Keep an eye on evolving discourse and product road maps

- **Attention is beginning to permeate walled gardens.** Until recently, attention metrics were available for use primarily on the open web. Now, walled gardens are slowly opening up to third-party measurement solutions, including attention providers. Walled gardens often have their own tools that optimize for outcomes, but attention partnerships may be forged as advertisers rely more heavily on attention metrics for top-level strategy.

- **International solutions are a work in progress.** Although some vendors have sizable international footprints, US data sets tend to be much larger. Over the next few years, expect attention providers to pursue expansions in other markets.

- **Cross-media attention isn't on the horizon—yet.** Video and static display—which will collectively account for over half of digital ad spending this year, according to our forecast—are attention metrics' bread and butter. Scalable attention metrics for audio formats are a bit more challenging since many commonly used biometric and contextual signals don't apply (e.g., eye tracking, scroll speed). Since less than 5% of digital ad budgets will go to audio this year, attention providers are focusing product development on other areas.

EMARKETER Interviews

EMARKETER research is based on the idea that multiple sources and a variety of perspectives lead to better analysis. Our interview outreach strategy for our reports is to target specific companies and roles within those companies in order to get a cross-section of businesses across sectors, size, and legacy. We also look to interview sources from diverse backgrounds in order to reflect a mix of experiences and perspectives that help strengthen our analysis. The people we interview for our reports are asked because their expertise helps to clarify, illustrate, or elaborate upon the data and assertions in a report.

Jeff Bander
President
eye square
Interviewed August 20, 2024

Ben Dimond
Head of Data Partnerships and Strategy
GumGum
Interviewed August 27, 2024

Angelina Eng
Vice President, Measurement, Addressability, Data Center
Interactive Advertising Bureau (IAB)
Interviewed August 20, 2024

Mike Follett
CEO and Founder
Lumen Research
Interviewed August 19, 2024

Marc Guldimann
CEO and Founder
Adelaide
Interviewed August 7, 2024

George Ivie
CEO and Executive Director
Media Rating Council (MRC)
Interviewed August 19, 2024

Jeremy Kanterman
Vice President, Research and Insights
Integral Ad Science (IAS)
Interviewed August 22, 2024

Joanne Leong
Global Head of Media Partnerships
dentsu
Interviewed September 20, 2024

Karen Nelson-Field
CEO and Founder
Amplified Intelligence
Interviewed September 4, 2024

Ron Pinelli
Senior Vice President Digital Research and Standards, Associate Director
Media Rating Council (MRC)
Interviewed August 19, 2024

Daniel Slotwiner
Senior Vice President, Attention
DoubleVerify
Interviewed August 19, 2024

Collette Spagnolo
Vice President, Marketing Analytics
DoubleVerify
Interviewed August 19, 2024

Jon Waite
Global Managing Director Mx Design and Activate
Havas Media Network
Interviewed August 29, 2024

Jon Watts
Managing Director
Coalition for Innovative Media Measurement (CIMM)
Interviewed August 27, 2024

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Sources

Adelaide

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