

TV Performance Report H1 2019

T>>VISION



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All Impressions Are Not Created Equal.

It is an awfully exciting time to be in the media business. Never before have we had more data, tools and technology to extract the greatest value from our marketing and media investments. Never before have we been able to gain deep insights into why our plans are performing the way that they do. As they say in the movies, *“with great power comes great responsibility.”* And with that context I am excited to introduce the latest TV Performance Report from TVision.

Media planning is ultimately about understanding trade-offs. *“If I do more of this, and less of that”* what is the predicted impact on the business? Understanding trade-offs requires a similar foundation upon which our plans are developed. We need to think about television, digital, radio, OOH and print in a similar way. That foundation or building block has been impressions, or GRPs for decades.

As we know, **all impressions are not created equal.** All impressions are not necessarily viewed by human beings that are attentive, receptive and ready to buy your product or service. In fact, one could argue in today's complex media environment, genuine human attention is our most precious commodity.

This is why I am so excited about the value that TVision is bringing to the market. Understanding TV Viewability and Attention allows us to move beyond the *“opportunity to see”* and understand who is *actually seeing* our ads in market. It gives us a second-by-second view and allows us to look at our television investments in

a similar way to digital video. It allows us to plan better, optimize better and extract the greatest value from our investment. It will also provide a solid foundation for the duration-weighted currency that the industry is moving towards.

In this report you will get a taste of what is possible with TVision data. From specific case studies, to insights by vertical category and understanding what it takes for creative to breakthrough, hopefully it will pique your curiosity. Think about how this data could be put to use on your campaigns – from planning to buying to in-market optimization.

Finally, at the end of the report you will be introduced to two new products that I have been able to preview. *TVision Streaming Analytics* will provide a person-level view into OTT Viewability and Attention across devices and applications which has been nearly impossible to measure to date. As OTT continues to scale, understanding consumption in this area will be an imperative for modern marketers. Additionally, *TVision Audiences* is a first-of-its kind dataset that empowers brands to digitally reach consumers based on their engagement with TV content. The use cases are endless, and will undoubtedly illuminate new opportunities for your brands.

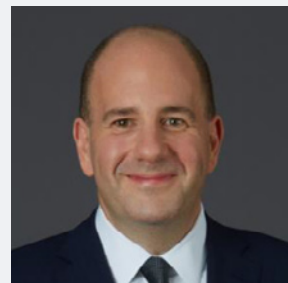
As I said upfront, it is an exciting time to be in the media business.

Enjoy!

- DAVID COHEN

David Cohen led MAGNA's North America business from 2016 to 2019 - driving investment, intelligence and innovation in his role as President. David also led Global Partnerships for MAGNA and has helped set the overall vision and remit for the organization.

David is innately driven to push boundaries and challenge the status quo, having served as the Chair of the 4A's (American Association of Advertising Agencies) Digital Marketing Committee from 2009-2012, as well as on advisory boards for the IAB, Google, Facebook, and Snapchat. He currently provides his industry expertise as an advisor to TVision.



TV Performance Metrics



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.



Ad Attention (%):

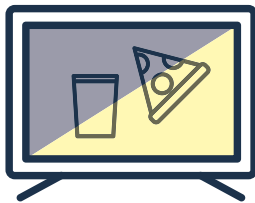
This metric measures how effectively an ad or ads held viewers' attention while they aired. It is measured as the percentage of all ad impressions in which the viewer was looking at the TV screen for two or more seconds.



Creative Attention Score (CAS):

This metric measures an ad's ability to grab the audience's attention, as compared to surrounding ad content. CAS measures the percentage of an ad's aggregate run time that viewers spent with their eyes on the screen, as indexed against the other ads that ran in the same ad pod.

Understanding the Differences Between TV & Digital Viewability



TV Viewability:
Is the *PERSON* in front of the screen?



Digital Viewability:
Is the *AD* on the screen?

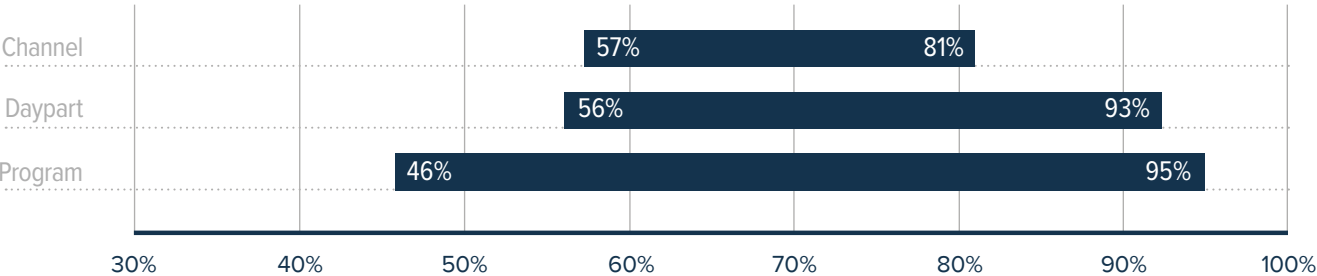
The Variance of TV Viewability

While it's true that, on average, 29% of all TV ads air without anyone in the room, TV Viewability varies a great deal for each advertiser based on a number of factors, including the brand's channel, daypart, and program mix, as well as the brand's industry. By analyzing five specific brands — from the Auto, CPG, Finance, Insurance, and Healthcare industries — we can get a better sense of how many brand advertisers perform in different environments.

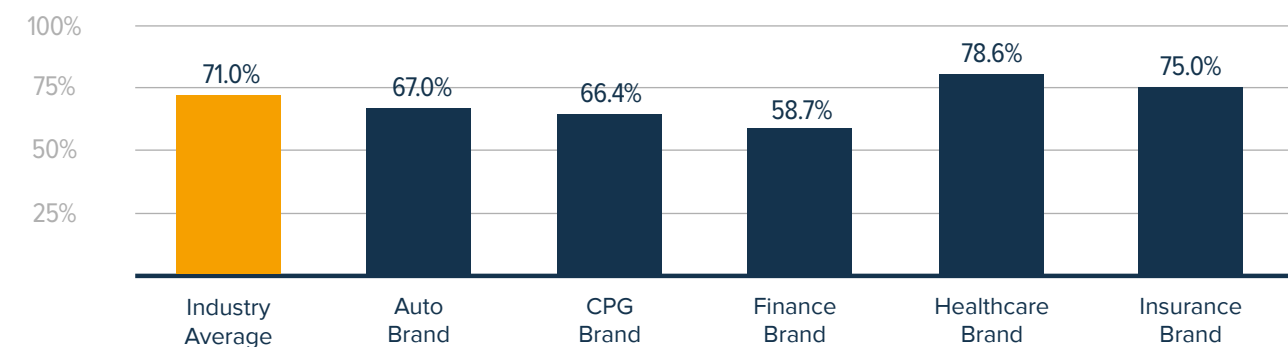
There is a wide variance in TV Viewability when it comes to media planning components. For example, there is a wide range among channels, with TV Viewability as low as 57.0% and as high as 81.0%. The range was even wider when it came to programs and dayparts. At the brand level, specific brands analyzed in the Healthcare and Insurance categories had the highest TV Viewability rates - at 78.6% and 75.0%, respectively - topping the cross-industry average of 71.0%.

To go deeper into the many factors that impact TV Viewability, see the full multi-brand report at [TVision/variance](#).

TV Viewability Varies by Many Factors



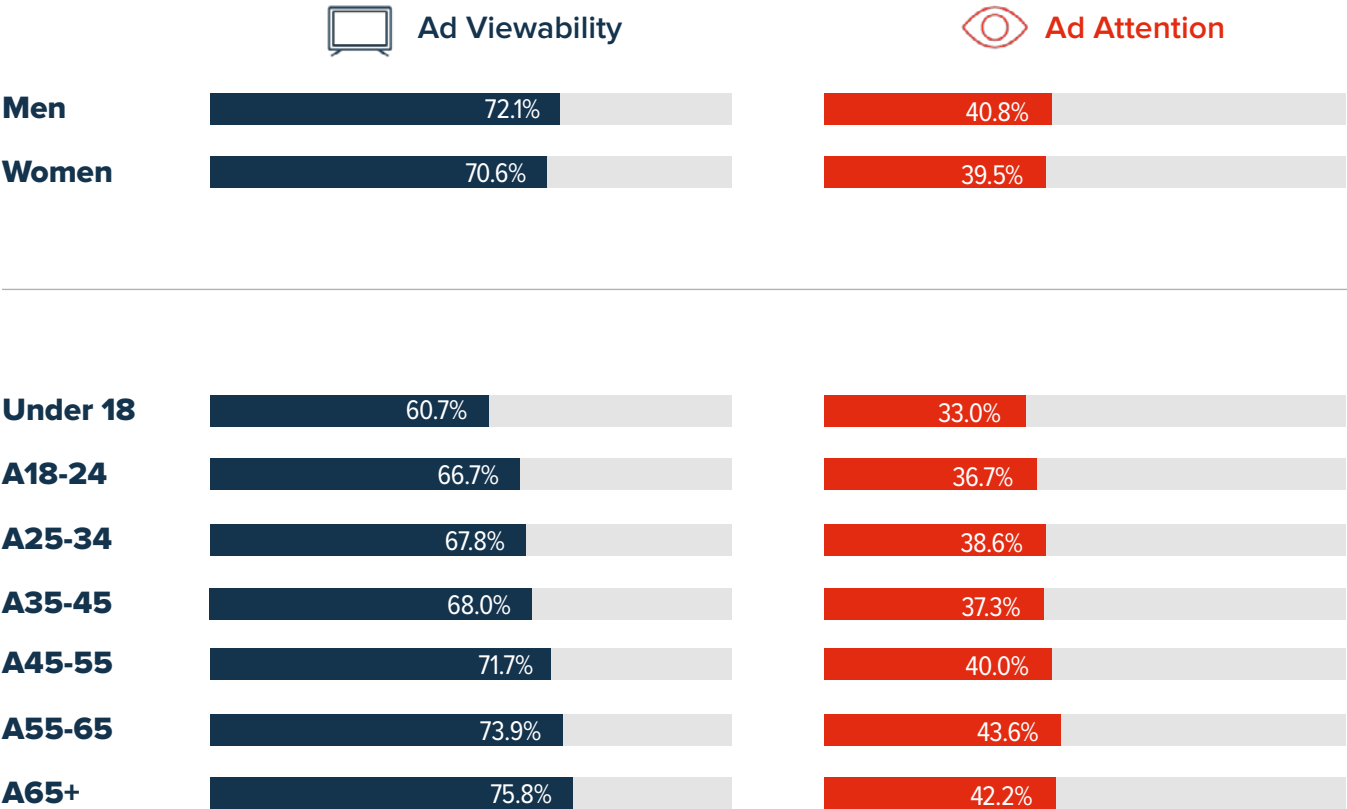
Brand Variance of TV Viewability



TV Ad Performance by Gender & Age

TV watching varies across gender and age demographics. And while Viewability and Attention gaps between men and women are negligible, the first half of 2019 saw more pronounced differences in engagement across age groups.

TV Viewability rates were highest among viewers aged 65 and older, with each younger age group being successively less likely to be in the room during an ad break. There was also a general trend of older viewers paying more attention than younger viewers, but viewers 55-65 wound up being a more attentive audience than their more senior counterparts. Viewers 18 and under were the least attentive group, paying Attention to just 33.0% of the TV ads they were served.

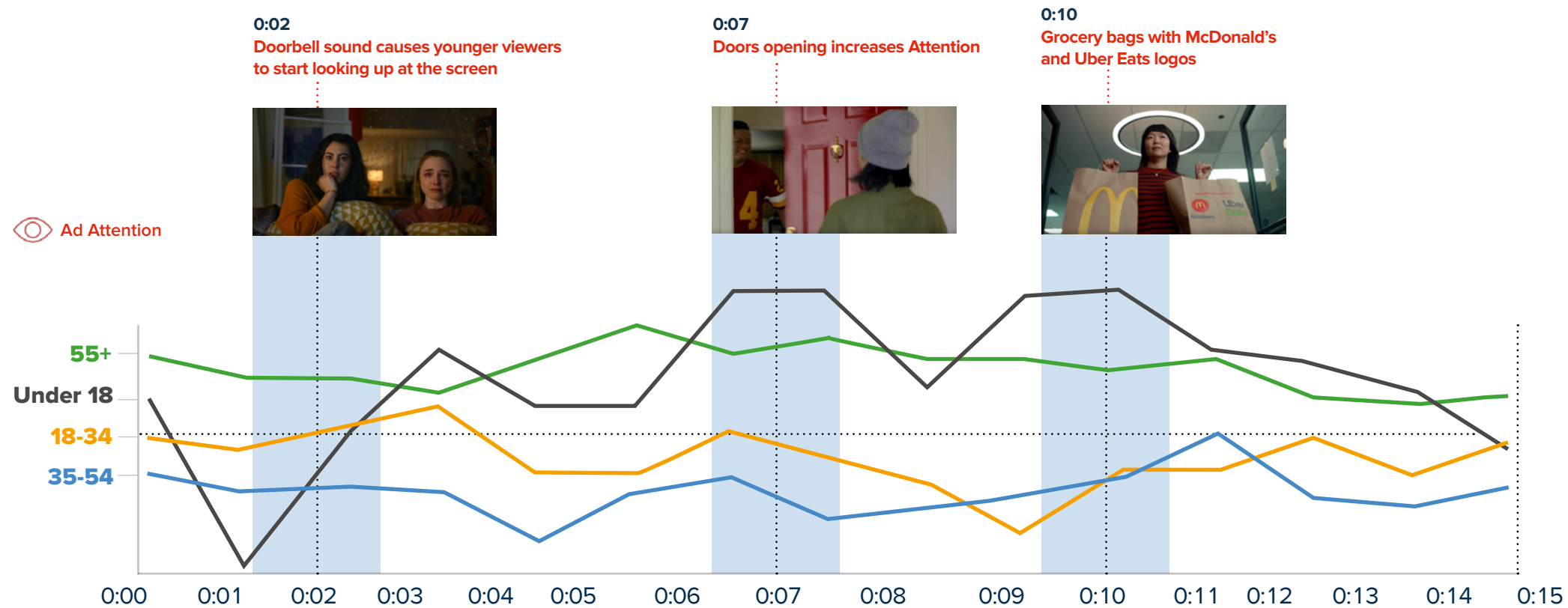


How McDonald's & Uber Eats Delivered Engaging Advertising

TVision's person-level, second-by-second Attention measurement allows advertisers to understand how viewers are engaging with any TV ad and which creative elements are driving that engagement.

A recent McDonald's ad featuring Uber Eats saw viewers under 18 and over 55 pay high levels of Attention throughout. This success may be attributable to the fast-food chain's enduring appeal with teens and seniors, or to the fact that these demographics are less likely to drive and thus more likely to order delivery.

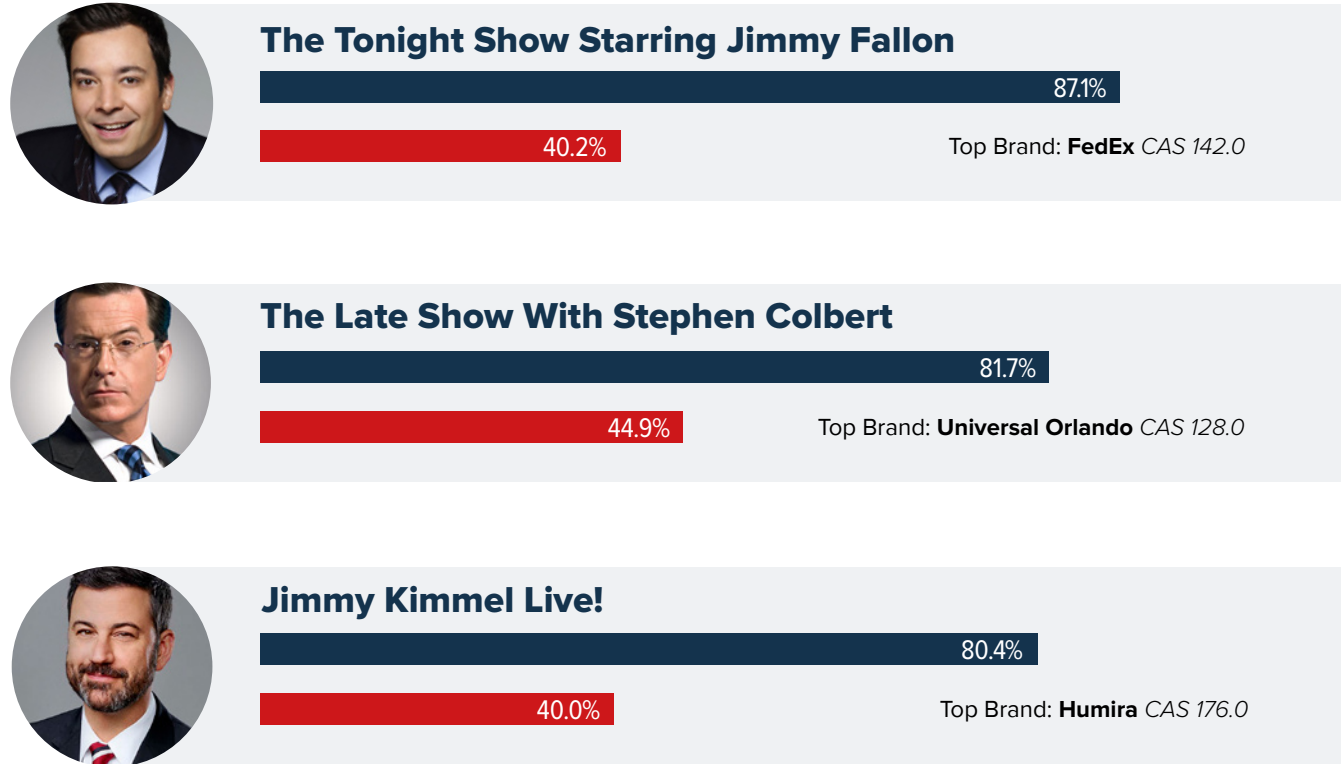
During the ad, there was a noticeable Attention spike among all age groups around the 7-second mark, during a montage of excited customers opening the door to receive their delivery. Another spike at the 12-second mark occurs during a close-up of two delivery bags bearing both the McDonald's and Uber Eats logos.



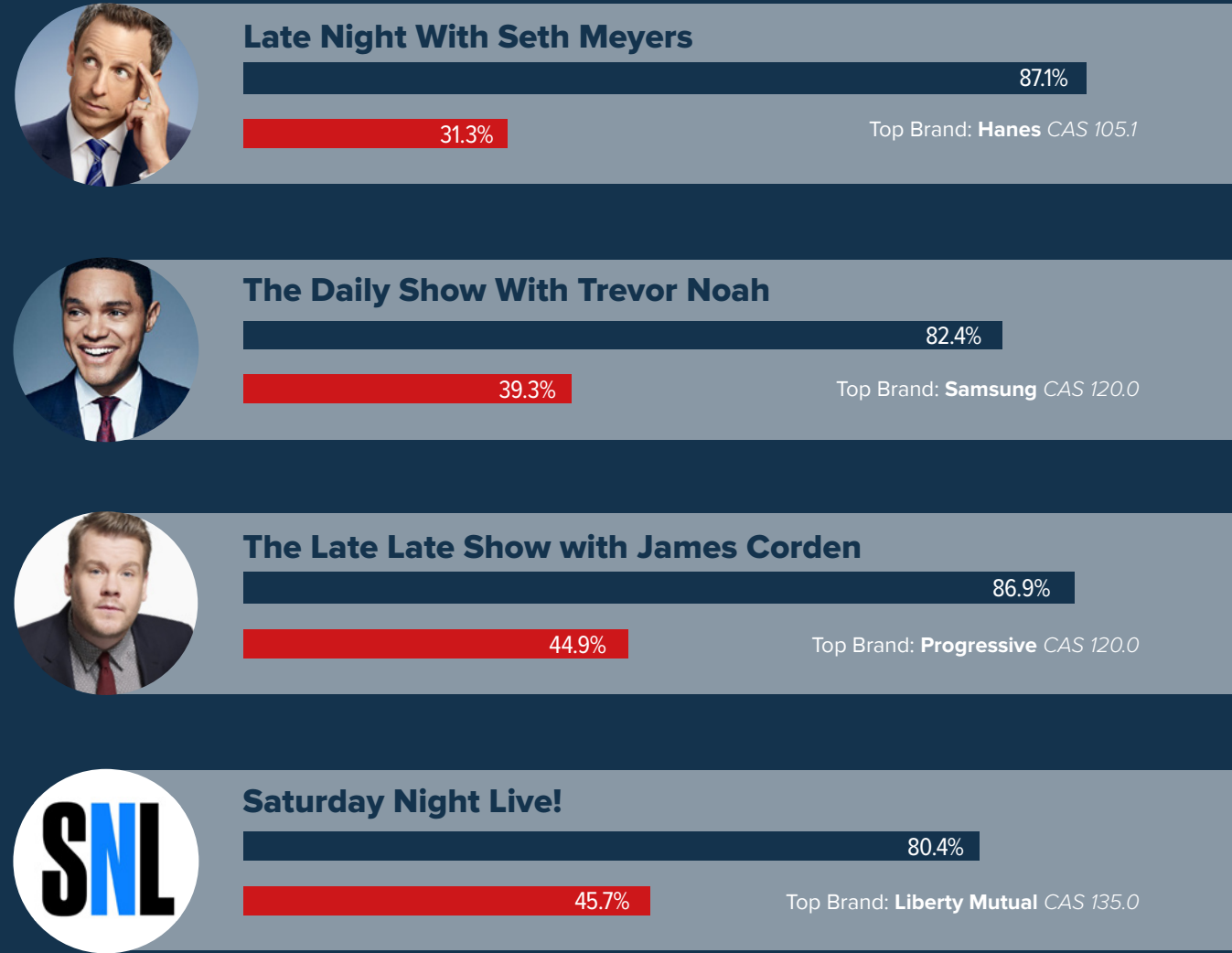
Late-Night Comedy Drives High Ad Viewability, but Ad Attention Varies

Late-night television is a crowded arena, and brands need to invest wisely if they hope to stand out. During the first half of 2019, all of the major late-night programs posted strong TV Viewability numbers, ranging from 87.1% for both *The Tonight Show Starring Jimmy Fallon* & *Late Night with Seth Meyers*’s, to 80.4% Viewability for both *SNL* and *Jimmy Kimmel Live!*

Ad Viewability Ad Attention



Unfortunately, it’s not enough for viewers to just be in the room when ads air — they need to be paying attention. Despite sharing the same high Viewability, *Late Night with Seth Meyers* was 22% less efficient at generating attentive ad impressions than *The Tonight Show Starring Jimmy Fallon*. Though it fell on the lower end of the TV Viewability rankings, *Saturday Night Live* had the highest Attention at 45.7%, followed closely by *The Late Show with Stephen Colbert* and *The Late Late Show with James Corden*. Liberty Mutual, Universal Orlando, and Progressive were some of the best performers in these late-night programs, as measured by Creative Attention Score (CAS).



Not All Award Shows are Created Equally

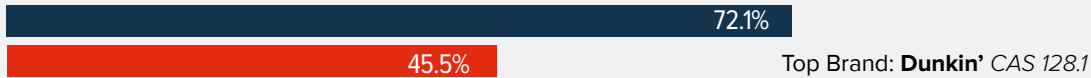
Live events are the lifeblood of broadcast and cable television, and H1 2019 had its fair share of major award shows and sports events (also see pages 11 and 12). Award shows are popular among brand advertisers looking to make a big splash on the red carpet. Some of the big winners were movie promo ads from Paramount Pictures and Walt Disney Pictures, in addition to Lexus and QSR brands Dunkin’ and Popeye’s.

June’s Country Music Awards - while a smaller audience than marquee events like the Grammys and Oscars - kept viewers glued to their screen during commercial breaks. The CMAs drove high TV engagement with both higher Viewability (76.0%) and Attention (45.7%). The Golden Globes also performed well with a Viewability percentage of 72.1% and an Attention percentage of 45.5%.

 Ad Viewability  Ad Attention



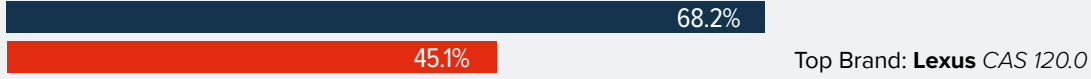
76th Annual Golden Globe Awards



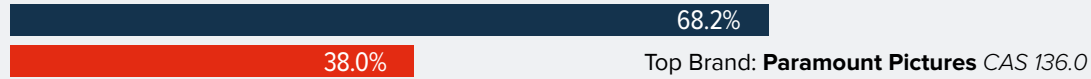
61st Annual Grammy Awards



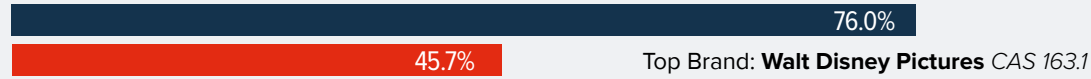
91st Academy Awards



2019 Billboard Music Awards



54th Annual Academy of Country Music Awards



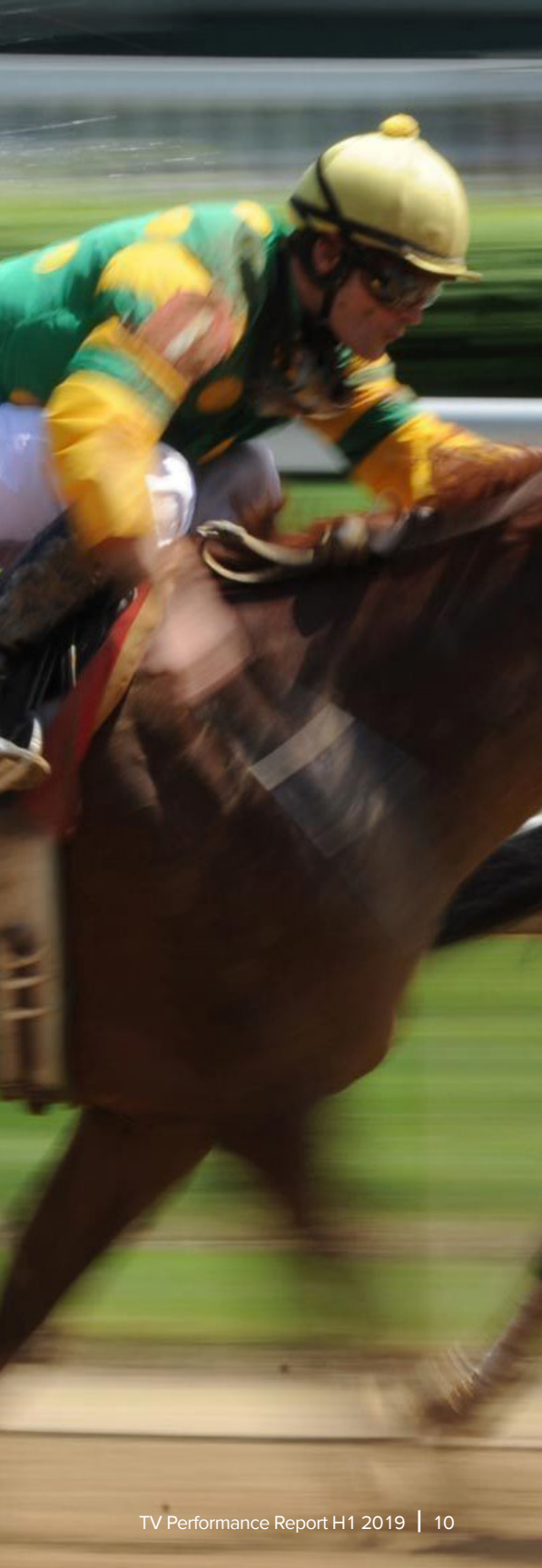
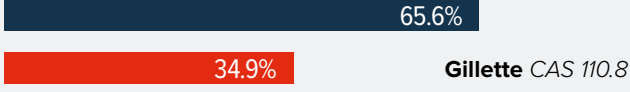
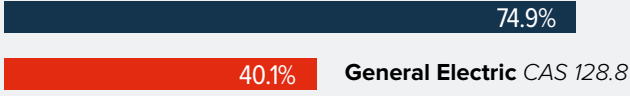
Brands Jockeying for Ad Success in the Triple Crown

Each year, horse racing’s Triple Crown - the Kentucky Derby, Preakness Stakes, and Belmont Stakes - make up three of the most anticipated events of the summer sporting season. Typically, interest in the races rises and falls with the possibility that one of the horses will win all three competitions for a historic Triple Crown.

Following *Country House*’s dramatic win at the Kentucky Derby in May, the horse was pulled from the Preakness Stakes due to an illness. Despite the fact that a Triple Crown was out of the picture before the race began, Viewability and Attention nonetheless peaked, at 74.9% and 40.1%, respectively, during the Preakness Stakes.

2019 Triple Crown

Top Brand



Which Brands are Winning the Championships?

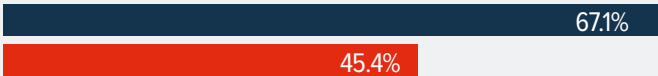
Whether your favorite sport is football, basketball, hockey or golf, the first half of 2019 featured major events that kept viewers tuned in and engaged. Though not all engagement is the same, Viewability and Attention across championship games can yield tremendous value for advertisers looking for highly-engaged viewers.

Surprisingly, the Super Bowl had lower TV Viewability than other major events, given many watching in a party setting. But the Big Game had strong performance, with viewers paying Attention to 43.3% of its ads. With such a large audience, the Super Bowl certainly generates lots of TV ad engagement. And the brand with the highest level of breakthrough across all these major sporting finals? Reese’s took home the big trophy with a Creative Attention Score of 132.0 during the NBA Finals.

Ad Viewability Ad Attention



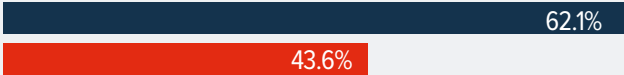
College Football Championship



Top Brand: **Dr Pepper** CAS 117.0



Super Bowl LIII



Top Brand: **ADT** CAS 113.0



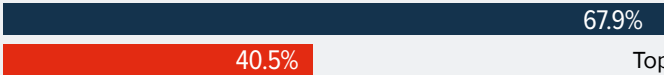
NCAA March Madness Championship



Top Brand: **Buick** CAS 128.0



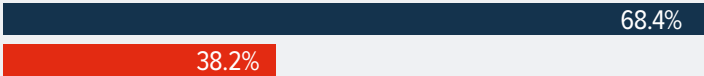
2019 Masters - Final Round



Top Brand: **Mercedes-Benz** CAS 103.0



NHL Stanley Cup - Final Game



Top Brand: **Wendy’s** CAS 125.0



NBA Championship - Final Game



Top Brand: **Reese’s** CAS 132.0

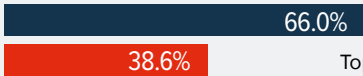
Advertising Performs Consistently Across The Big Dance

Even if you aren’t a big college basketball fan, chances are you fill out your March Madness bracket like the rest of us! Without even knowing all the teams, fans are guaranteed nail-biters, upsets, and someone winning The Big Dance.

Unlike a single game such as the Super Bowl, March Madness covers multiple games airing across several channels. We decided to take a look at aggregate ad performance across each network airing games during the tournament. Cable networks yielded slightly higher Viewability, and games airing on TNT generated the highest Ad Attention at 41.4%. Across the entire tournament, Walt Disney Pictures, Arm & Hammer, and Netflix were best able to break through the clutter.



NCAA Basketball Tournament



Top Brand: **Netflix** CAS 132.2



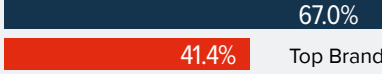
NCAA Basketball Tournament



Top Brand: **Arm & Hammer** CAS 128.3



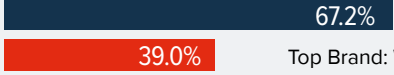
NCAA Basketball Tournament



Top Brand: **Walt Disney** CAS 140.0



NCAA Basketball Tournament



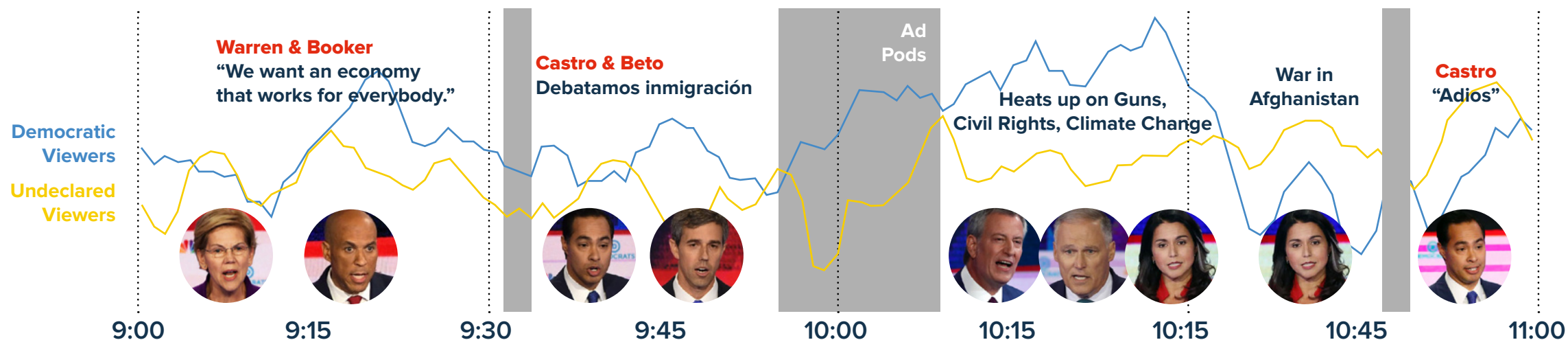
Top Brand: **Walt Disney** CAS 155.2



Analyzing the Politics of Attention

The road to 2020 began in earnest earlier this year with the Democratic presidential primary debates kicking off this past June. During both of the first debates, Democrat-leaning viewers tended to pay closer attention than Undeclared viewers. And with fewer ad pods than most live events, brands like Quickbooks, Rakuten, The New York Times, Progressive, and WeatherTech generated the highest viewer engagement. With several more debates remaining in 2019, it will be interesting to see how the many candidates - and brands - perform when it comes to viewer engagement.

Debate Night #1: June 26



Debate Night #2: June 27



Top Brand Advertisers

Night #1

- 1 Intuit quickbooks.
- 2 The New York Times
- 3 PROGRESSIVE

Night #2

- 1 Rakuten
- 2 The New York Times
- 3 WeatherTech

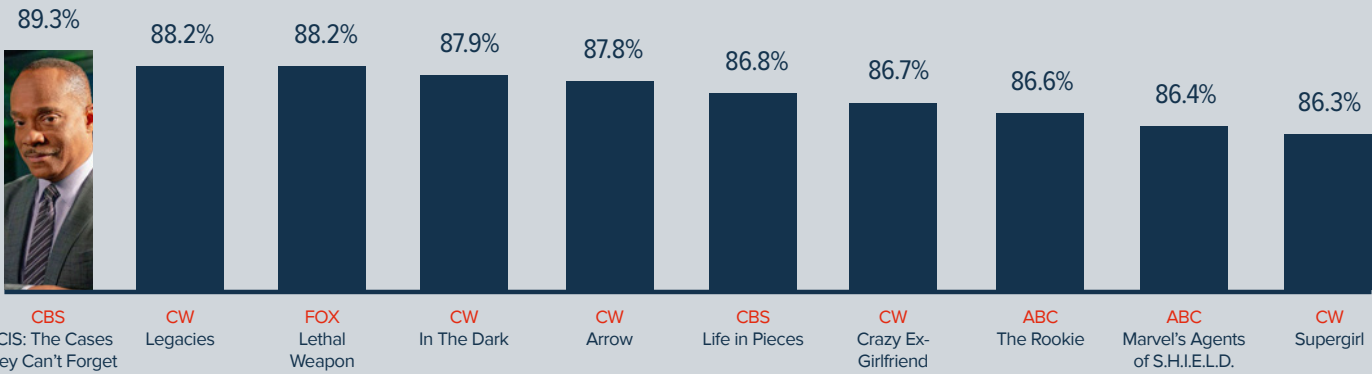
Top Primetime Broadcast & Cable Programs

BROADCAST

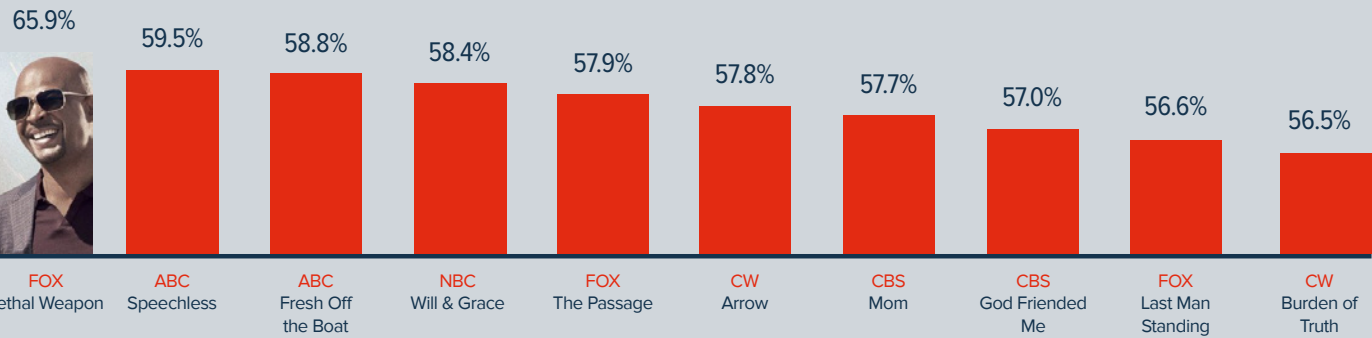
Appearing on our top 10 lists for both Ad Viewability and Ad Attention, FOX's *Lethal Weapon* and The CW's *Arrow* stood out as two of the best Broadcast TV advertising opportunities of the year. Additionally, *NCIS: The Cases They Can't Forget* was a top-rated Broadcast show for TV Viewability, keeping viewers in the room more than other programs.

The CW placed five shows in the top 10 for Ad Viewability, suggesting its audience is less likely than others to leave the room during commercial breaks. Overall, dramas seemed to make up a larger share of the Ad Viewability rankings while sitcoms like *Speechless* and *Fresh Off the Boat* overperformed in Ad Attention.

Broadcast - Ad Viewability



Broadcast - Ad Attention



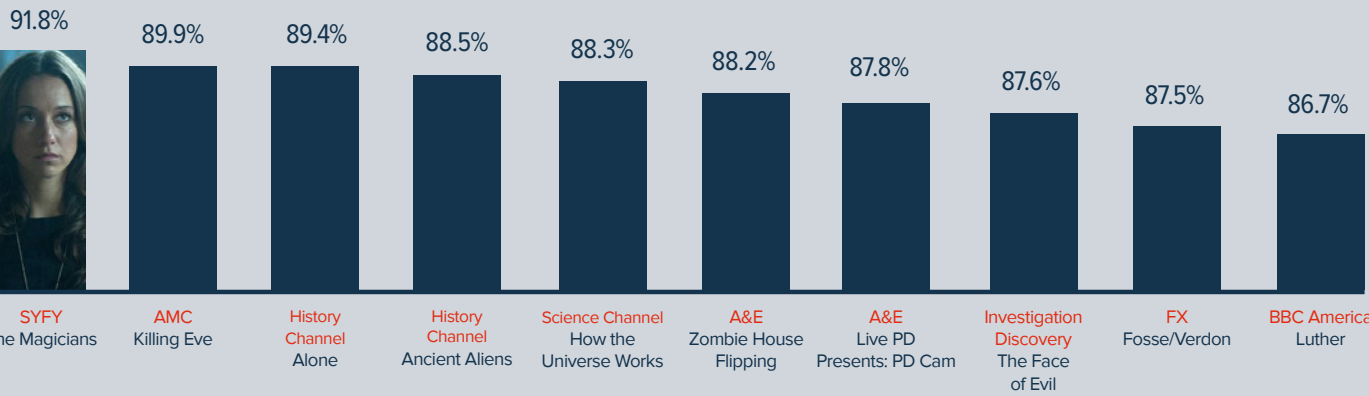
CABLE

On Cable, content that is often more niche — including history, science, and reality TV programs — engaged viewers with shows like *My Big Fat Fabulous Life* and *Ancient Aliens* drawing spots in the top 10.

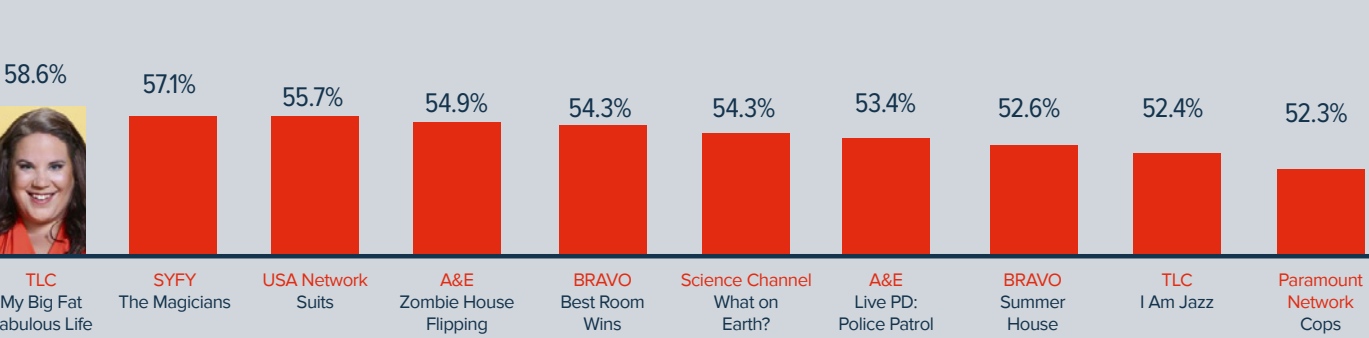
The science fiction drama *The Magicians* and the reality show *Zombie House Flipping* were the big winners of this period, placing in the top 10 for both Ad Viewability and Ad Attention.

Ad Viewability Ad Attention

Cable - Ad Viewability



Cable - Ad Attention



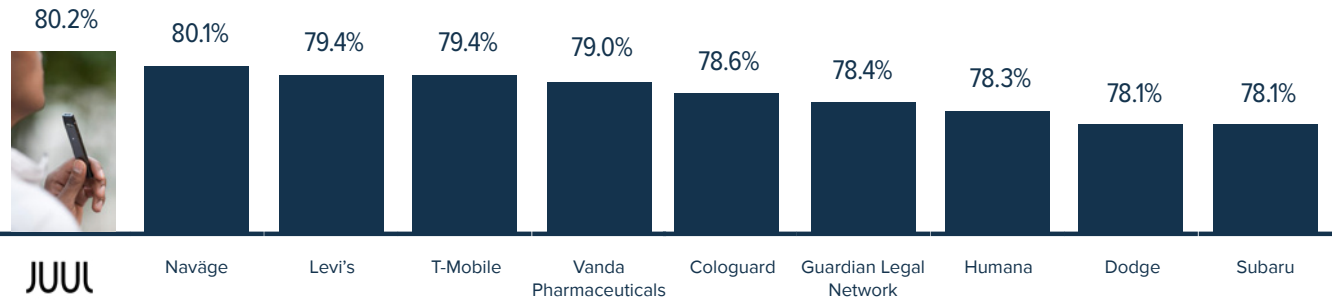
For Brand Advertisers, it is Important to Optimize for both Viewability & Attention

In order to really make their mark on TV, brands need to keep viewers in the room and capture their attention while their ads air. From this perspective, Cologuard, Levi's, T-Mobile, and Subaru all began the year on the right foot, with each placing in the top for both categories.

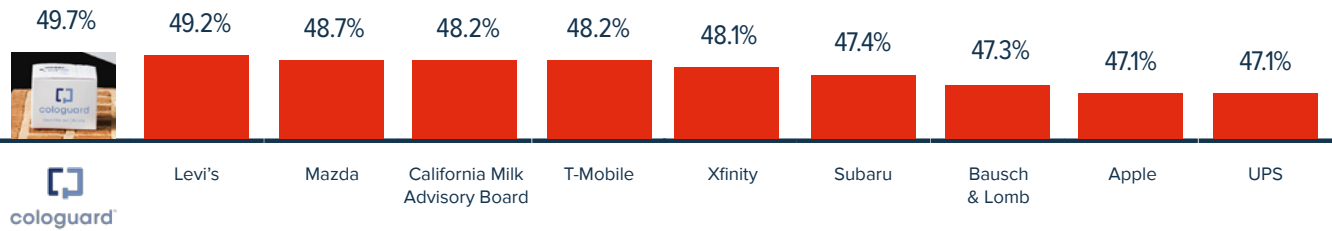
E-cigarette brand JUUL and healthcare brand Naväge topped our Ad Viewability rankings, but they failed to grab viewer Attention at a rate comparable to other leading brands on TV.

 Ad Viewability  Ad Attention

Top Brands, Overall Viewability

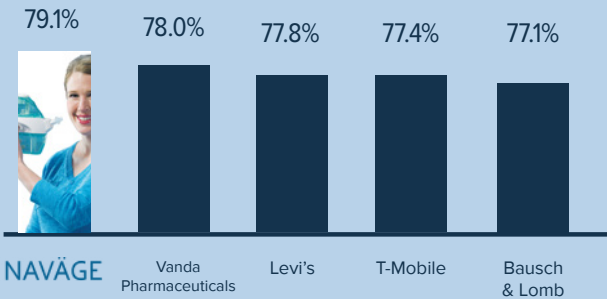


Top Brands, Overall Attention

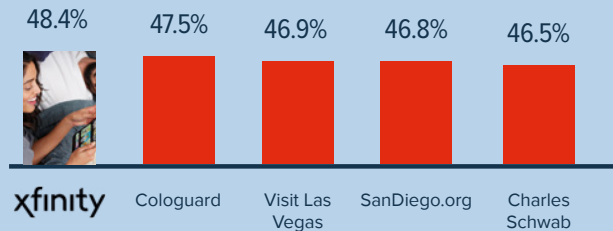


Measuring at the person-level, we also analyzed top performing brand advertisers for men and women. Naväge's TV ads for sinus relief kept men in the room, while Xfinity kept their eyes on-screen — beating out brands in many other categories. For women, ads by e-cigarette leader JUUL kept them in the room while Cologuard's ads kept their eyes on-screen.

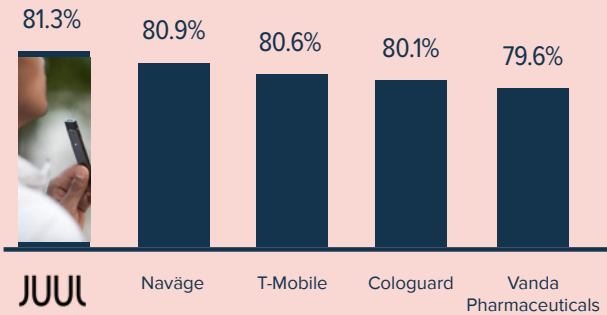
Top Brands, Male Viewability



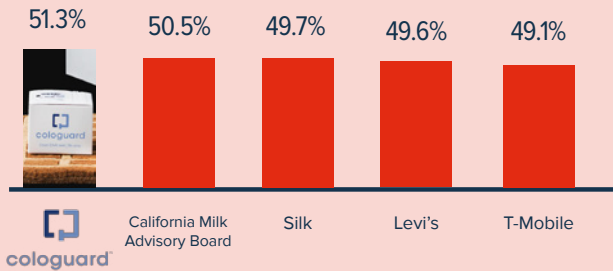
Top Brands, Male Attention



Top Brands, Female Viewability



Top Brands, Female Attention



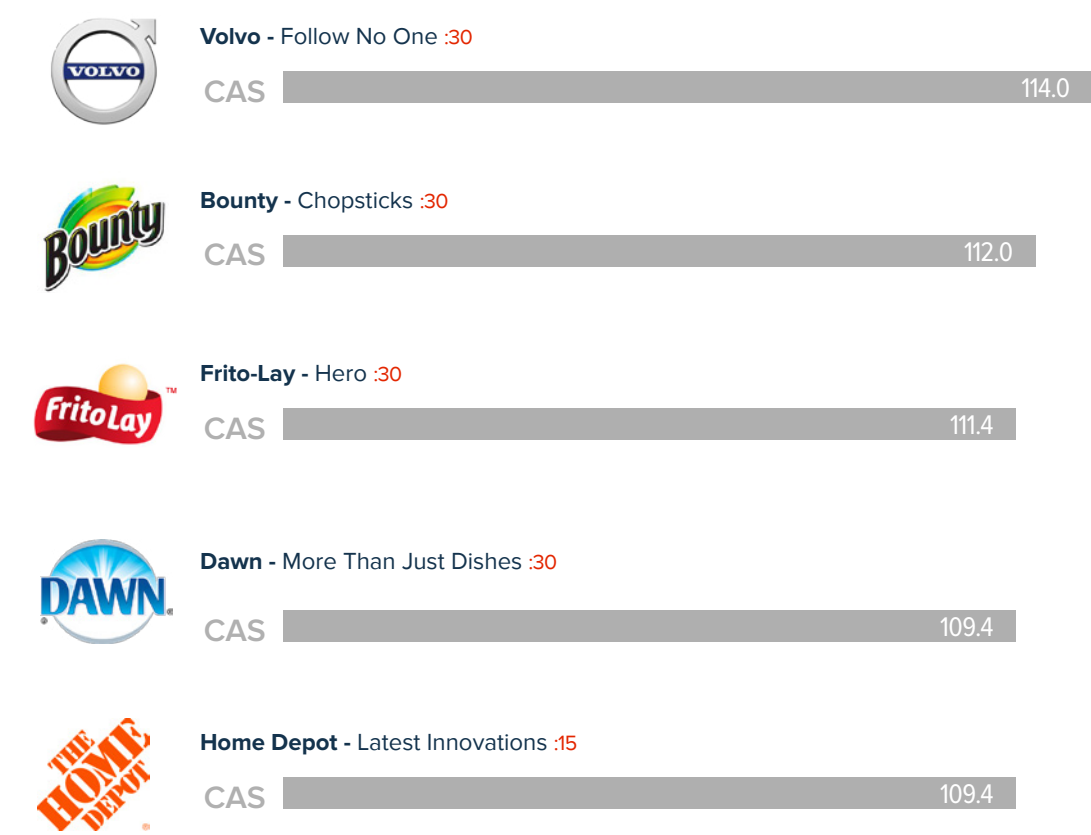
Top Ads Breaking Through the Clutter

Every brand marketer wants to make great TV advertising that engages their target consumers. Our Creative Attention Score (CAS) measures a TV commercial's ability to win viewer Attention as compared to the other content that runs during the same ad pod. This allows marketers to better understand the quality of the creative itself, isolated from contextual factors like when the ad airs and the show it runs inside.

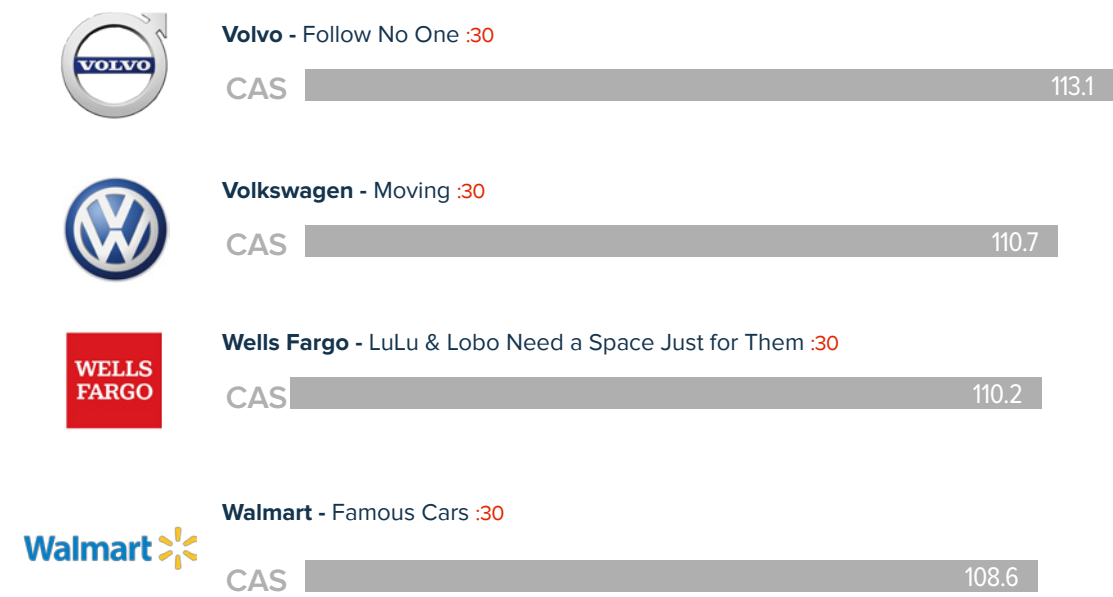
Using these unique, person-level, second-by-second metrics, Volvo was shown to have the most engaging TV ad of 2019's first half, with a CAS of 114.0 in a spot for its S60 sedan. The auto manufacturer was followed by ads for Bounty, Frito-Lay, Dawn, and Home Depot.

To watch this year's winning TV ads, alongside a second-by-second analysis, visit [TVision/TopAds](#).

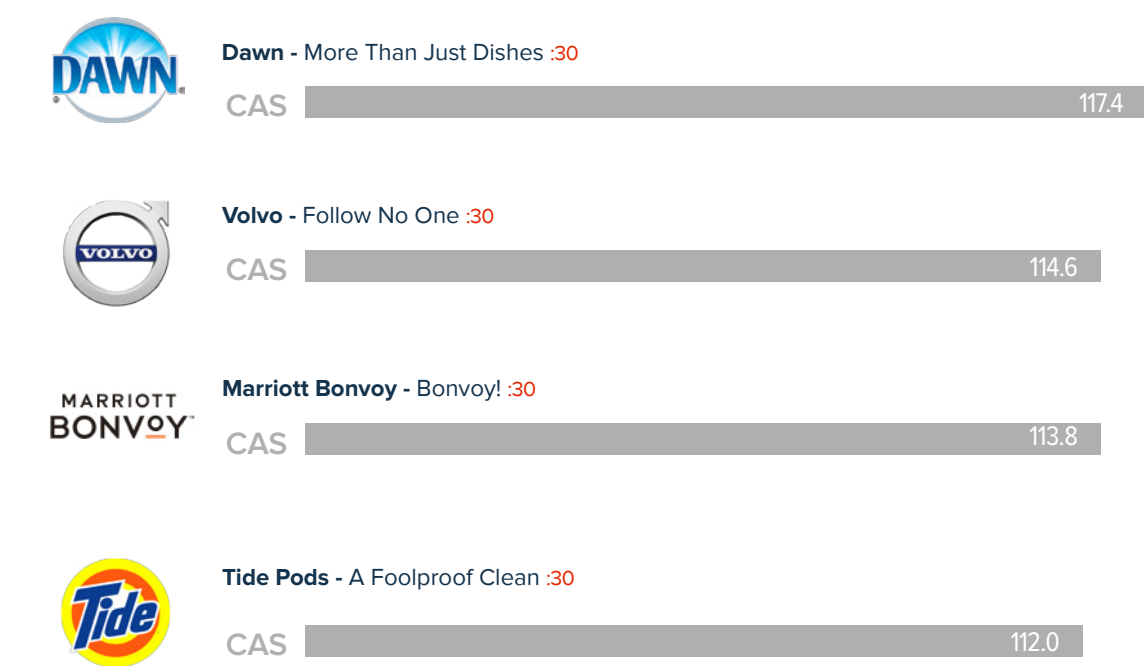
Top Overall CAS



Top Men CAS



Top Women CAS

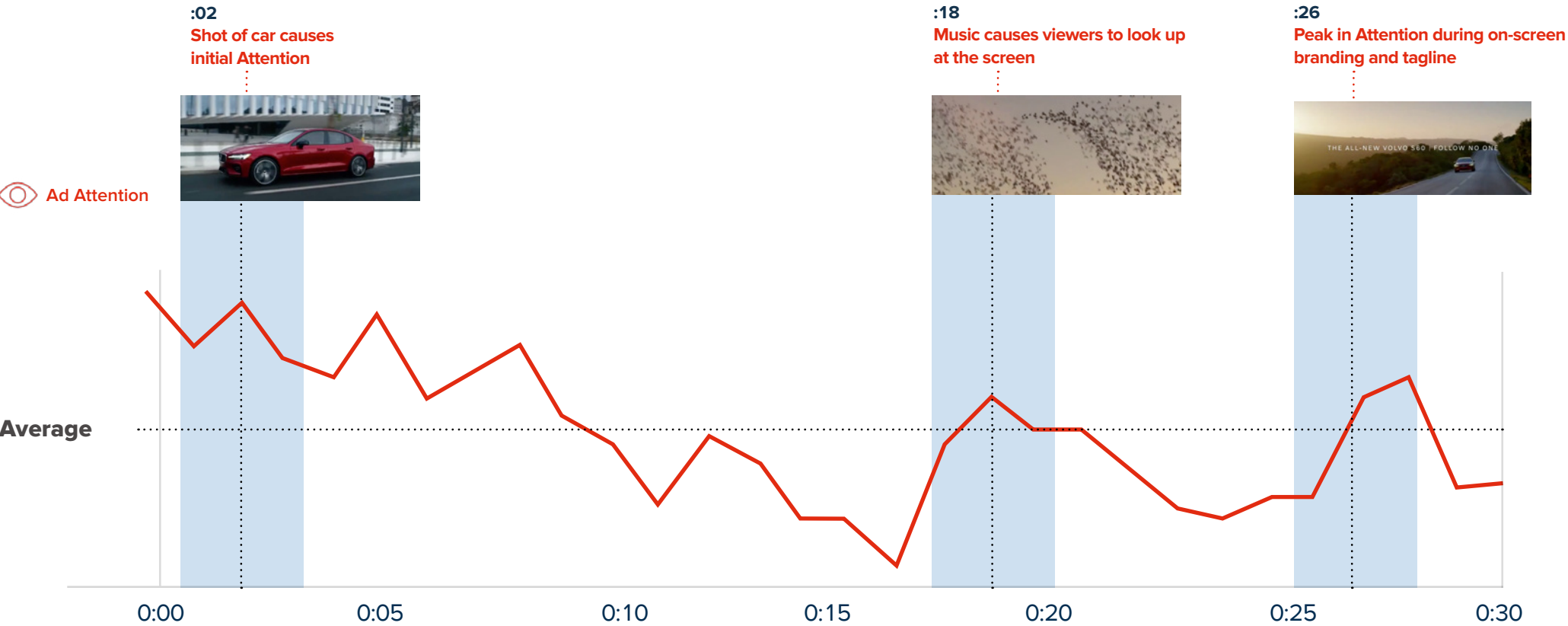


How Volvo Scored H1's Most Engaging Ad

For the first half of 2019, Volvo had the top performing ad with the highest Creative Attention Score (CAS), as seen on the preceding page. Using our second-by-second measurement technology, we're able to break down how and why Volvo was able to produce the most attention-grabbing ad.

Throughout the commercial, Volvo paired a narrated reading of an E.E. Cummings quote on individuality with images of the open road, successfully capturing the feelings of escape and adventure its luxury sedan is meant to inspire.

The ad saw an initial spike in Attention as its protagonist arrived at his vehicle after pushing through a crowd of people in suits. The introduction of a mysterious, upbeat musical cue caused viewers to look up at the screen at the 18-second mark, and Attention peaked again when Volvo's branding appeared on-screen at 26 seconds. To watch the full ad with our second-by-second analysis, visit [TVision/TopAds](#).

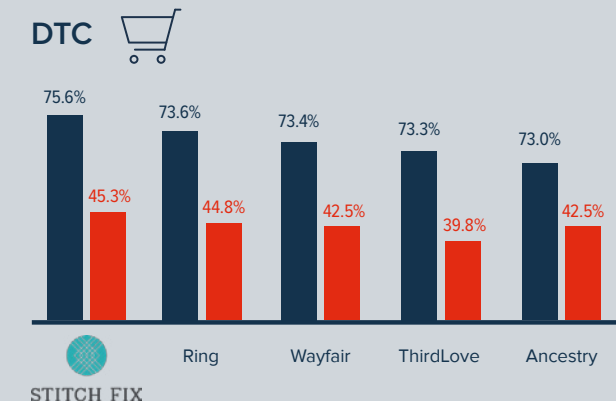
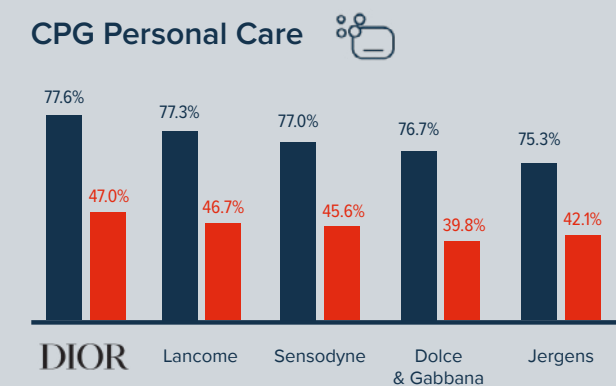
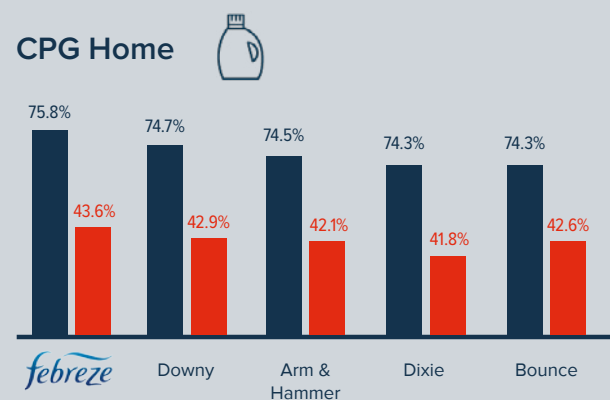
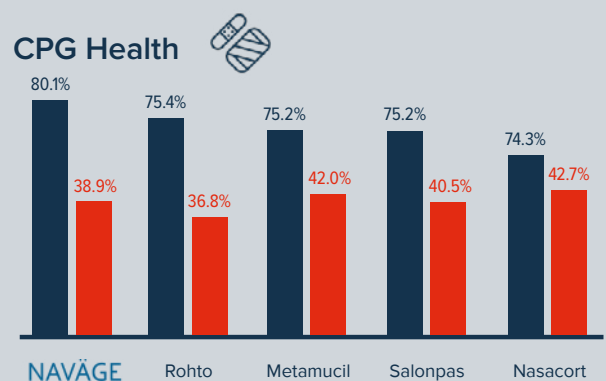
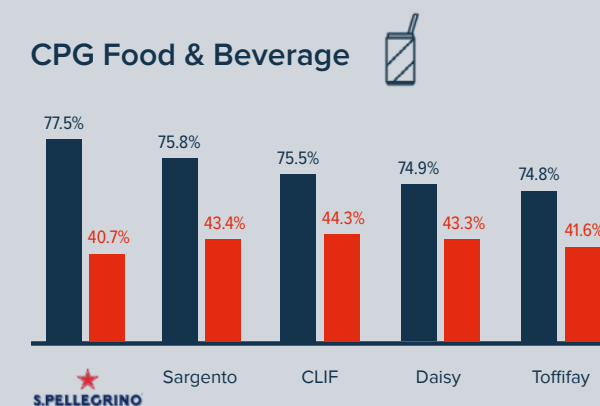
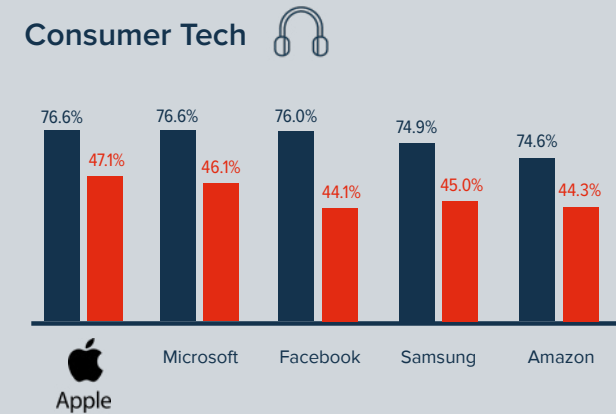
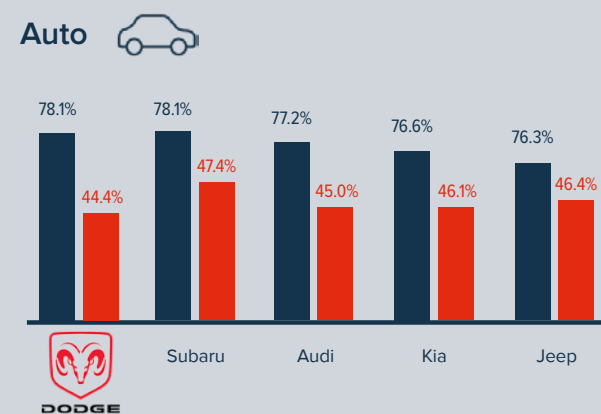
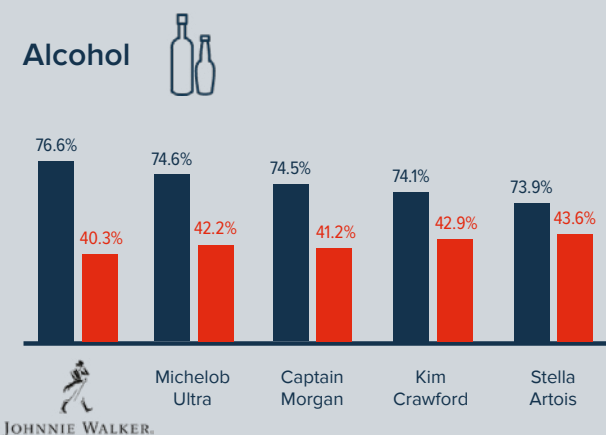


From CPG Health to DTC — Here's Who Topped Their Competition

As shown on page 3, there is a wide variance in brand TV performance - driven by many factors, including industry. Across all major industries, understanding who makes the top brands - and doesn't - is key to understanding TV performance.

Over the next few pages, we've ranked the top five brand advertisers for each major industry by TV Viewability - the percentage of impressions where viewers were in the room during their ads. For these top Viewability brands, we've also shown their respective Ad Attention scores. While Viewability and Attention are important together, it's equally important to understand Viewability first - as an ad cannot capture Attention if a viewer is not in the room.

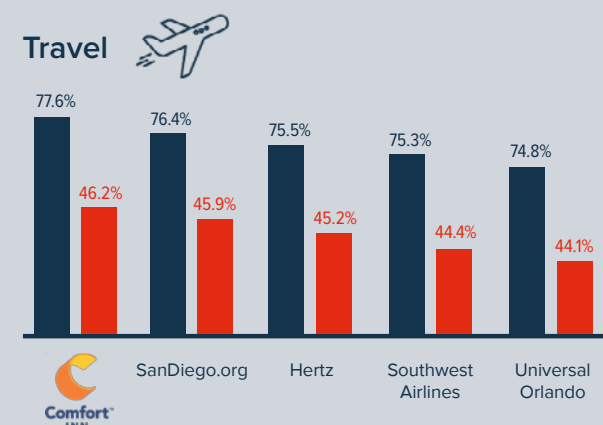
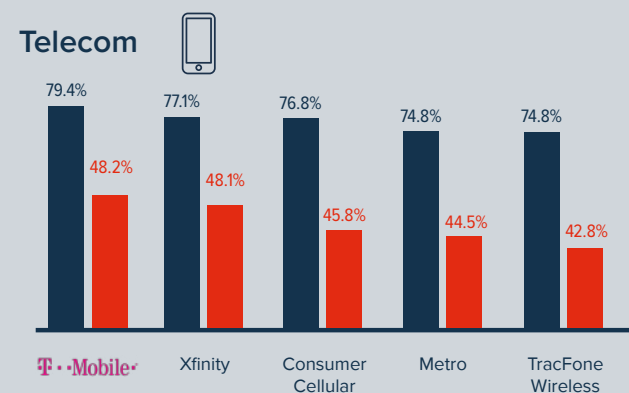
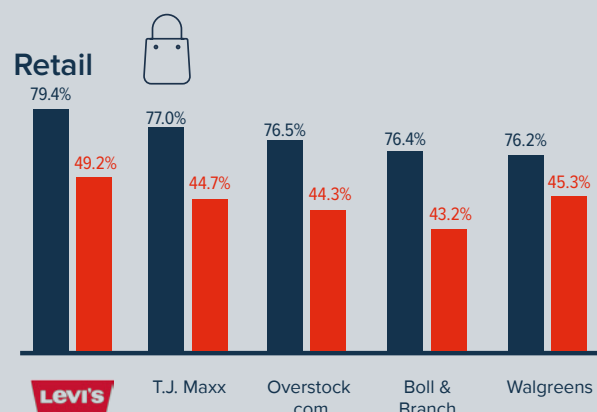
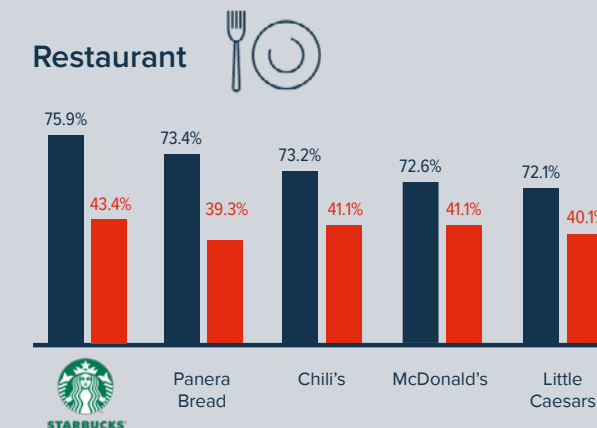
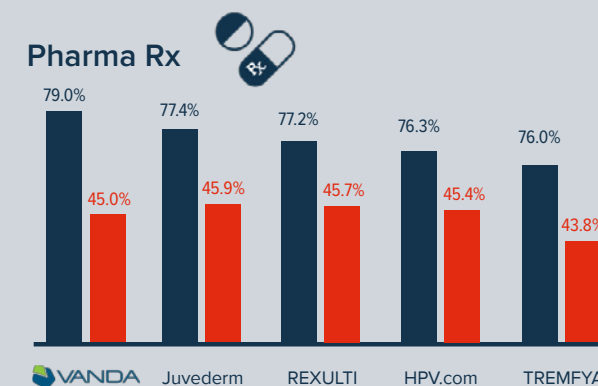
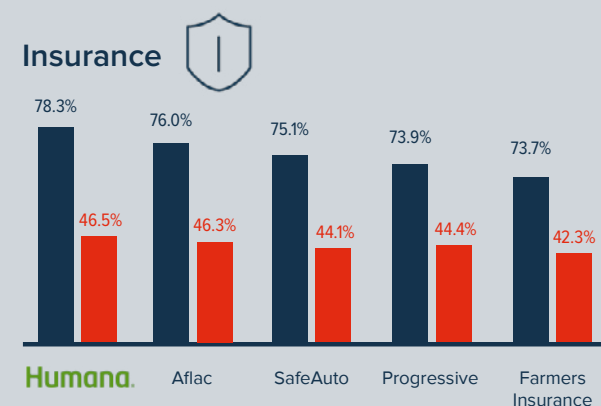
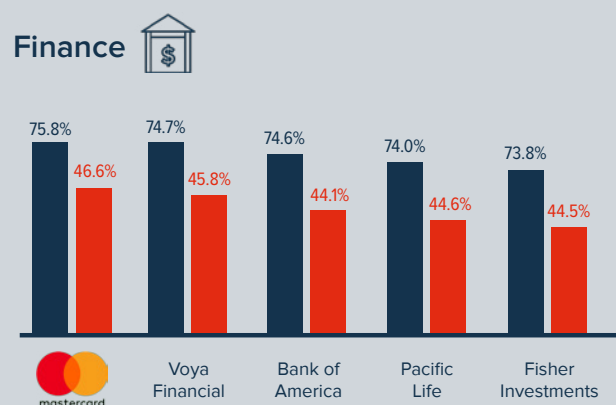
 Ad Viewability  Ad Attention



From Finance to Telecom — Here's Who Topped Their Competition

As shown on page 3, there is a wide variance in brand's TV performance - driven by many factors, including industry. Across all major industries, understanding who makes the top brands - and doesn't - is key to understanding TV performance.

 Ad Viewability  Ad Attention



TV Intelligence for an OTT World

The media industry trusts TVision to better measure their TV content performance. Now, *TVision Streaming Analytics* further enhances TVision's OTT measurement — providing performance metrics across leading streaming platforms at the device, application, and content-level.

KNOW WHERE TV AUDIENCES ARE GOING — AT THE PERSON-LEVEL

According to eMarketer, 56% of the US will be streaming TV - across 190 million OTT subscriptions - by 2020. As we increasingly consume TV content via non-linear services, there are more questions than ever:

- Which streaming shows are most popular?
- Which service do viewers use to watch their favorite shows?
- What demographics engage which content the most?
- How are viewing audiences shifting across TV platforms?

UNIQUE DATA, UNPARALLELED OTT INTELLIGENCE

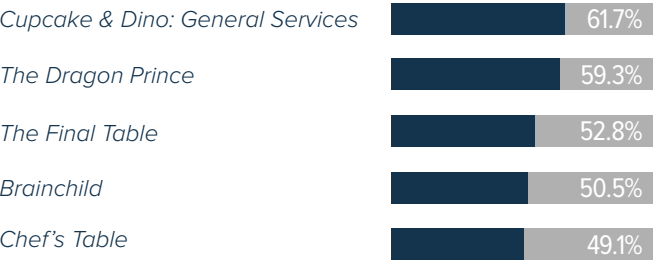
By delivering streaming behavior data, TVision is delivering highly sought-after, market-level analytics of a changing TV landscape.

- **Competitive Analytics:** Top shows and services.
- **Consumer Trends:** Analyze viewing consumption shifts.
- **Always-On Measurement:** 100% opt-in and privacy safe.



Most Co-viewed Shows

Percentage of episodes viewed with more than one person in the room during the program.



Most Rewatched Shows

Percentage of episodes viewed in the past 35 days that were not watched by the viewer for the first time.



Reach TV Audiences Like Never Before

Industry-leading brands use TVision's performance metrics platform to better plan and measure their TV advertising performance. With TVision Audiences, brands can now leverage true person-level TV engagement data — to drive digital video and advanced TV targeting strategies.

Engage TV Audiences across Digital & Advanced TV

- Person-level TV watching data
- Linear and OTT watching
- True engagement data — go beyond tuning
- Always on, passive measurement
- 100% opt-in and privacy-safe
- On-demand custom audiences

Unique Syndicated & Many Custom Audience Segments

TV STREAMING

- Streaming > High Streamers/Low Linear
- Streaming > New/Increasing Streamers
- Streaming > Binge Watchers
- Devices > Cord Cutters

TV VIEWABILITY

- High Viewability > Automotive TV Ads
- High Viewability > CPG TV Ads
- High Viewability > Entertainment TV Ads
- High Viewability > Financial Services TV Ad

TV ATTENTION

- TV Attention > High Attention to Sports TV
- TV Attention > High Attention to Insurance TV Ads
- TV Attention > High Attention to Retail TV Ads
- TV Attention > High Attention to Travel TV Ads

TV TUNING

- TV Tuning > Tentpoles > Watchers of Award Shows
- TV Tuning > Sports Content > Heavy Baseball Watchers
- TV Tuning > Networks > Heavy Watchers of The CW
- TV Tuning > Streaming > Watchers of Amazon TV

About TVision

The Leader in TV Performance 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 world's largest brand advertisers and TV networks. TVision is headquartered in New York City, with offices in Boston and Japan.

Make your TV Work Harder



PLANNING

Use performance metrics like Viewability & Attention to plan media – across your Upfront, scatter, or quarterly buybacks.



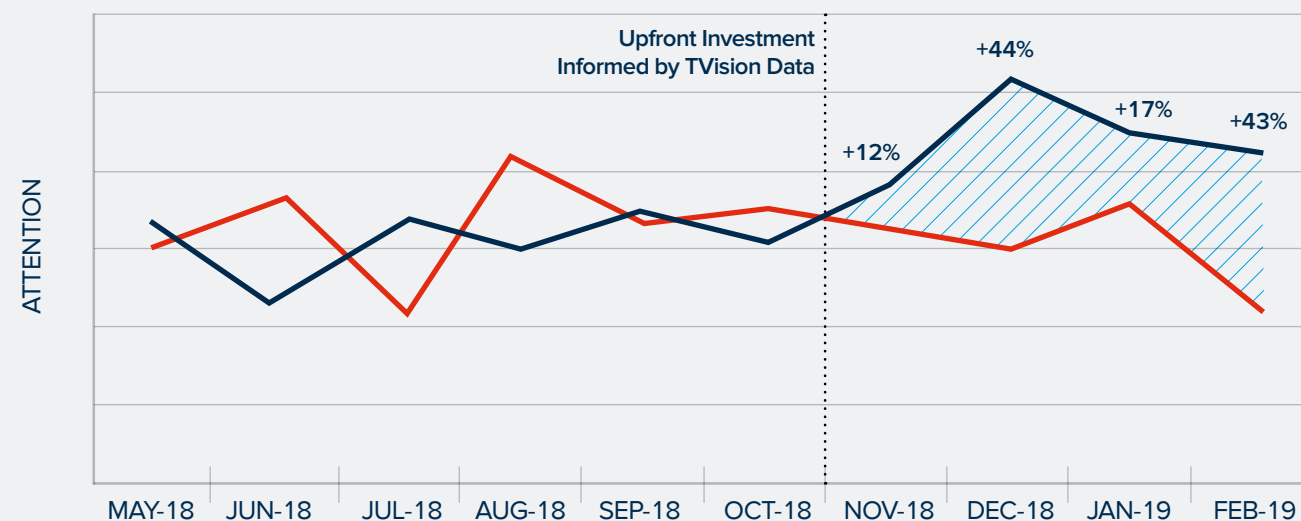
OPTIMIZATION

Our always-on solution is updated daily. Understand what's going on in your campaign and adjust channel allocations within Network groups.

Drive Greater TV Engagement

● TVision Client ● Competitor

Source: TVision Performance Metrics, A25-54, 2018-2019



Methodology & Metrics

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.

The data for this report was collected from January 1 to June 30, 2019, from 5,000 homes across the United States. All data is weighted to represent the country. All demographic data was self-reported by the respondents.

Additional Notes

- All data is measured second-by-second, person-by-person.
- All data includes Live Plus 3 Days.
- All data is for viewers P2+.
- Top brands and ads do not include network promotional ads or local ads, and are limited to :15 and :30-second ads.
- To qualify for rankings, top brands must have captured a minimum sample of 1,000.
- To qualify for rankings, all programs and ads must have a minimum sample size of 500.
- Top programs and ads are limited to English-speaking content only.

Key Metrics / Definitions



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.



Ad Attention (%):

This metric measures how effectively an ad or ads held viewers' attention while they aired. 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.



Creative Attention Score (CAS):

This metric measures an ad's ability to grab the audience's attention, as compared to surrounding content. CAS measures the percentage of an ad's aggregate run time that viewers spent with their eyes on the screen, as indexed against the other ads that ran in the same ad pod.

T>>VISION

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