



CUMULUS
MEDIA

Westwood One

AUDIO ACTIVE
GROUP

Media Attentiveness and Ad Skipping Report

Methodology

As attentiveness becomes a bigger focus for advertisers, the CUMULUS MEDIA | Westwood One Audio Active Group® commissioned Advertiser Perceptions, the gold standard in brand and agency sentiment, to probe 301 media agencies and marketers in December 2021 on the importance of consumer attentiveness and media platform concentration.

The results were compared to a 2018 MARU/Matchbox study of 1,901 persons 18+ commissioned by the Interactive Advertising Bureau (IAB), which measured consumer concentration levels with media platforms.

We also worked with Signal Hill Insights to conduct a MARU/Matchbox national U.S. study of 1,520 U.S. persons 13+ in October 2021. Respondents were asked about attentiveness and ad skipping of media platforms. These findings were compared to similar studies Signal Hill Insights has conducted in Canada.

New attentiveness measurement firms and organizations

THE 
ATTENTION
COUNCIL 

LUMEN

Adelaide

 **Amplified
Intelligence**

Attentiveness is gaining traction as a metric for understanding campaign effectiveness

In her new book *The Attention Economy and How Media Works*, Karen Nelson-Field, Founder and CEO of Amplified Intelligence, explains how “the ad industry’s current planning and buying model—for the most part falling into either performance or brand buckets—is inhibiting its ability to capture attention.” Her work reinforces the idea that **“a new currency is required, one that actually measures attention.”**

Jonathan Beguely, Senior Client Partner at Oracle Advertising, says, **“Attention signals align more closely with understanding campaign effectiveness** and getting a deeper understanding of the impact that each impression is having.”

OMD: Are you ready to get serious about attention?

“We need more publishers, platforms and networks to trade on attention in order that it becomes a widely-tradeable currency. The countdown to the age of attention has already started.”

Chrissie Hanson
Global Chief Strategy Officer
OMD Worldwide

“For those who are willing to make the commitment of time and resources, you can establish brand-specific attention scores and baselines that will allow you to incorporate an attention-based, brand-specific KPI into your media planning, buying and investment.

When OMD began its attention journey, we partnered with Amplified Intelligence, whose attention Trace technology allowed us to determine the limits of active attention (3.5 seconds), as well as which platforms and content earned this level of attention that drives both short-term brand choice and long-term brand preference.

[Attention metrics] can inform the development of brand experiences that genuinely understand and respect the audiences with whom we seek to connect, in the most credible, authentic and responsible way.”

Adweek, January 4, 2022

What Is Attention Worth? dentsu's Rozen Cracks The Code With Effective Attention CPM

In a January 2022 interview with Beet.TV, Doug Rozen, CEO dentsu Media – Americas, discusses how to measure and price attention with a new attention-based media currency, the effective attention cost per a thousand (EACPM)

“The average person is exposed to between six (thousand) and 10,000 ads every single day,” Rozen says. “That’s twice the amount that it was in 2007 and far, far, far from the 500-ish in the 1970s.”

“Forty-two percent of internet users worldwide are using an ad blocker. People’s attention span is now less than 10 seconds. Six seconds and 15 seconds have become dominant.”

“Our attention is under assault, and yet we continue to trade on reach, on impressions, and so we’re asking ourselves, ‘Why is that?’”

“Audience intention is just no longer a given – it’s something I believe we must earn. We all are watching more Netflix with less ads. We have to think about things differently.”

“We built a recall model looking at five values that lead to expected uplift. By combining all of this together, we’re able to create this new currency.”

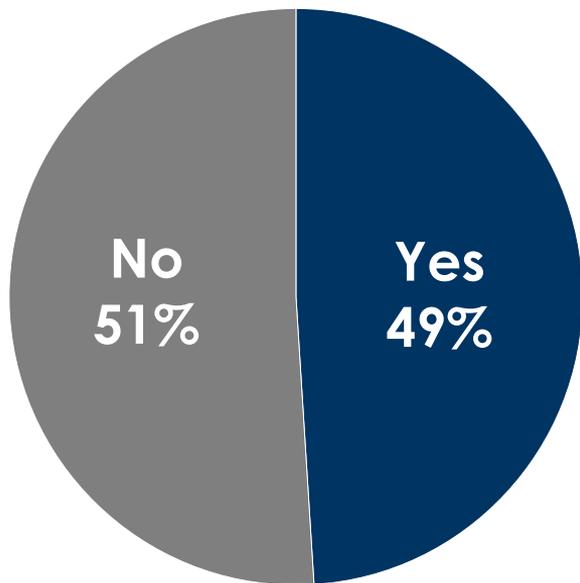


How important is attentiveness to advertisers and agencies?

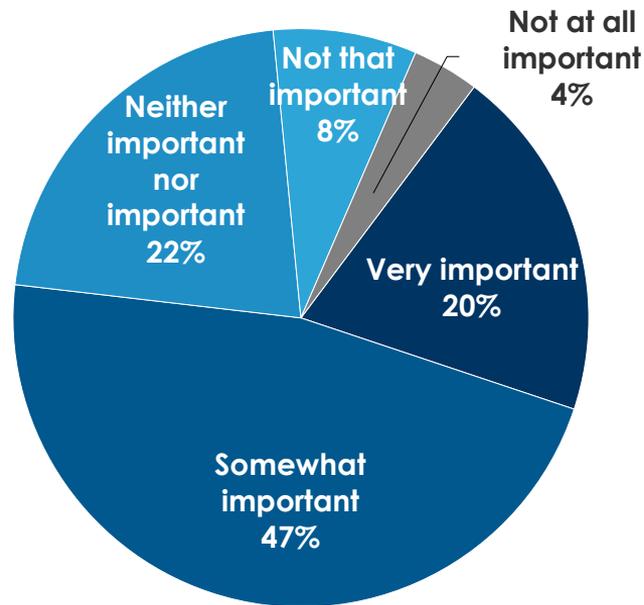
December 2021 study of 301 media agencies and marketers

Nearly half of advertisers have discussed consumer attentiveness as a metric; 2-in-3 say it is important for measuring media investments

Q: Have you and your colleagues ever discussed attentiveness/consumer attention as a metric for measuring the effectiveness of your media investments?



Q: How important is attentiveness/consumer attention as a metric for measuring the effectiveness of your media investments?

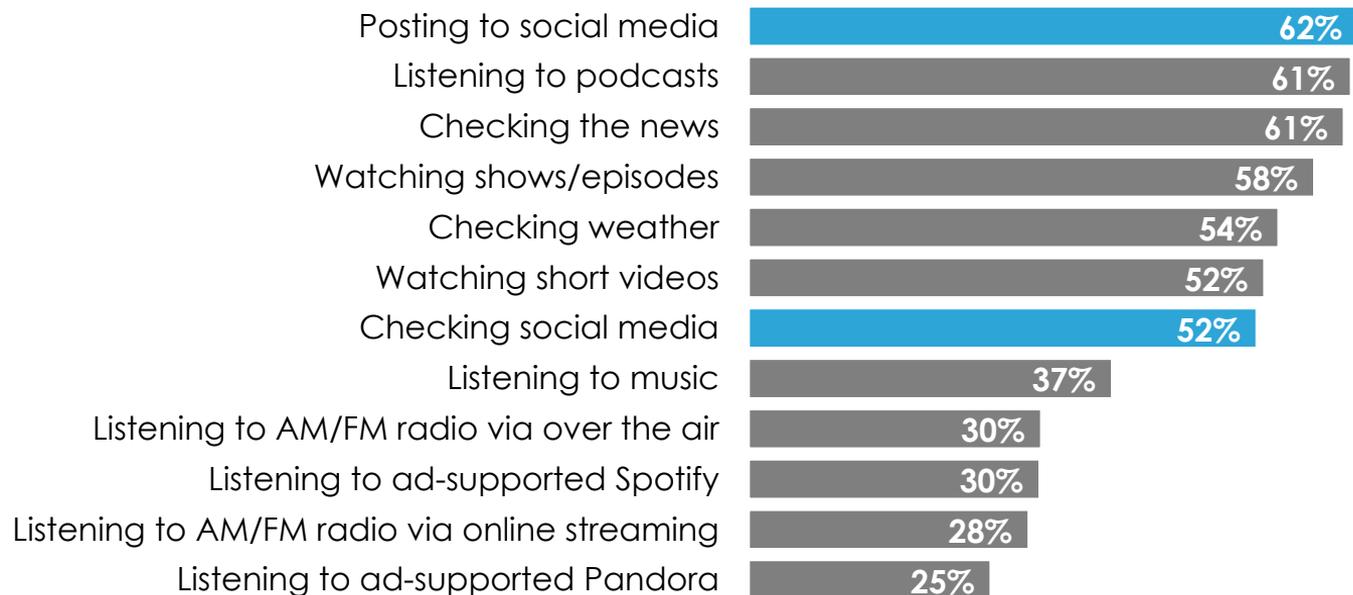




How do agencies/marketers perceive
consumer attentiveness and
concentration to media platforms?

Perception: Advertisers believe that consumers concentrate most on social media, podcasts, news, TV shows, and weather

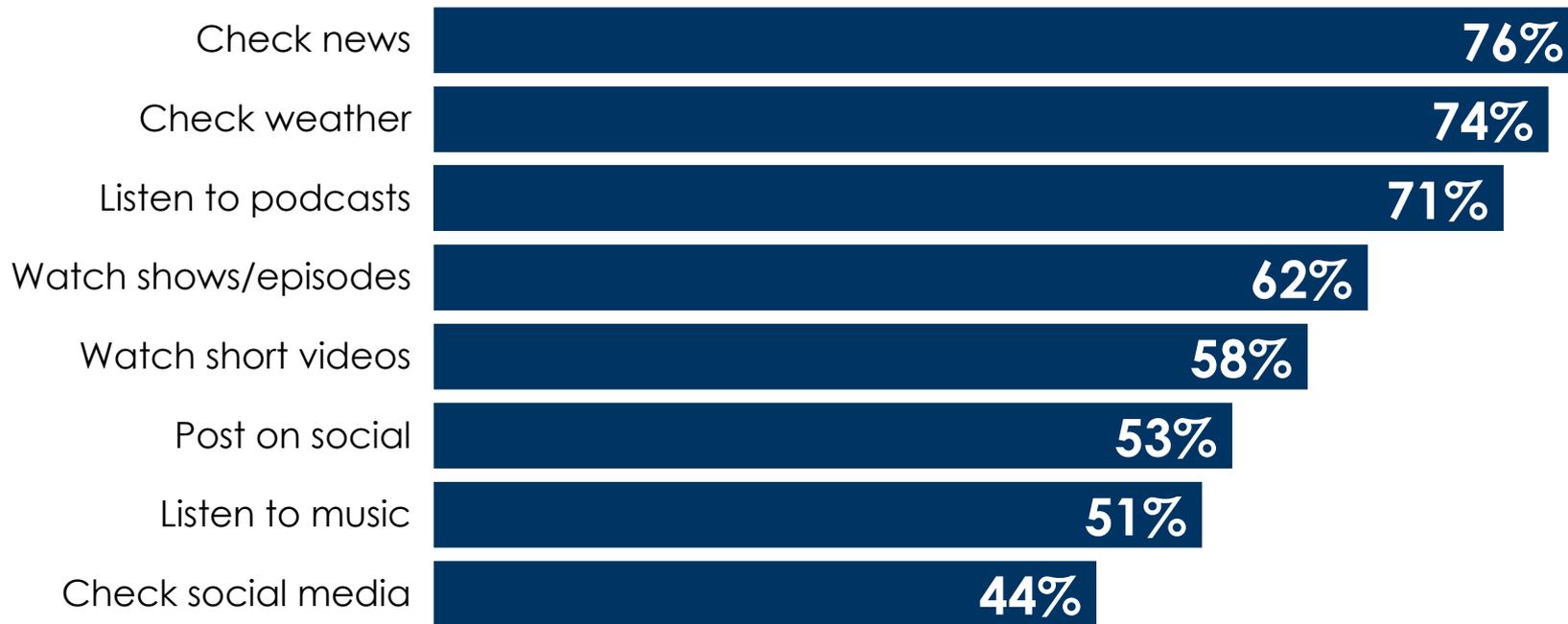
Q: Thinking about how the average consumer spends their time doing each of the following activities, how closely do you believe they are concentrating on the activity while they are doing it? (4 or 5 on a scale of 1 to 5 where 1 = not concentrating a lot and 5 = concentrating a lot)



Reality: According to an IAB consumer study, news, weather, and podcasts have strongest consumer concentration; Social media ranks last

% reporting high levels of concentration

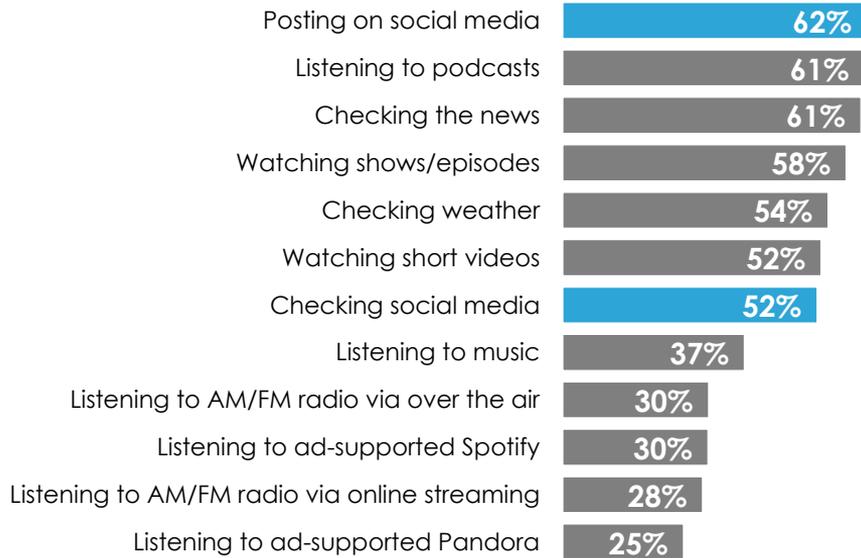
(4 or 5 on a scale of 1 to 5 where 1 = not concentrating a lot and 5 = concentrating a lot)



Advertisers correctly perceive strong levels of consumer concentration for information, podcasts, and TV shows; Social media concentration is overestimated

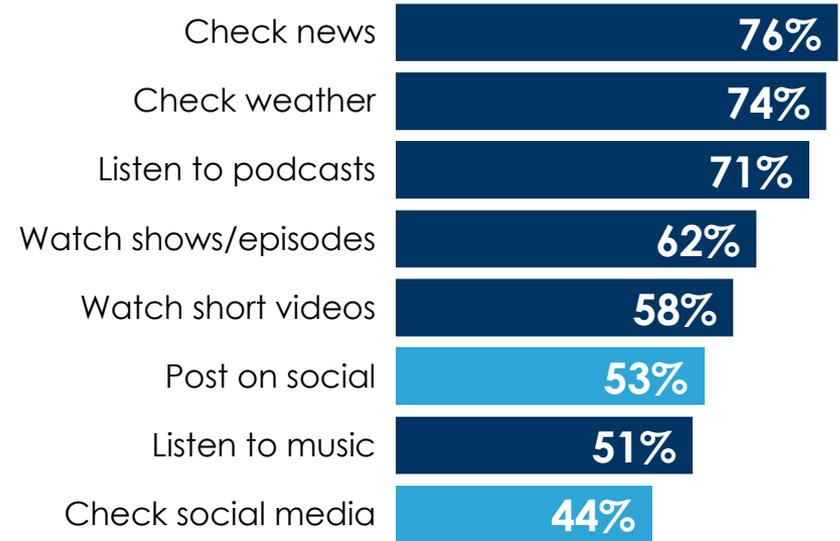
Perception: Advertiser Perceptions

Q: Thinking about how the average consumer spends their time doing each of the following activities, how closely do you believe they are concentrating on the activity while they are doing it? (4 or 5 on a scale of 1 to 5 where 1 = not concentrating a lot and 5 = concentrating a lot)



Reality: IAB

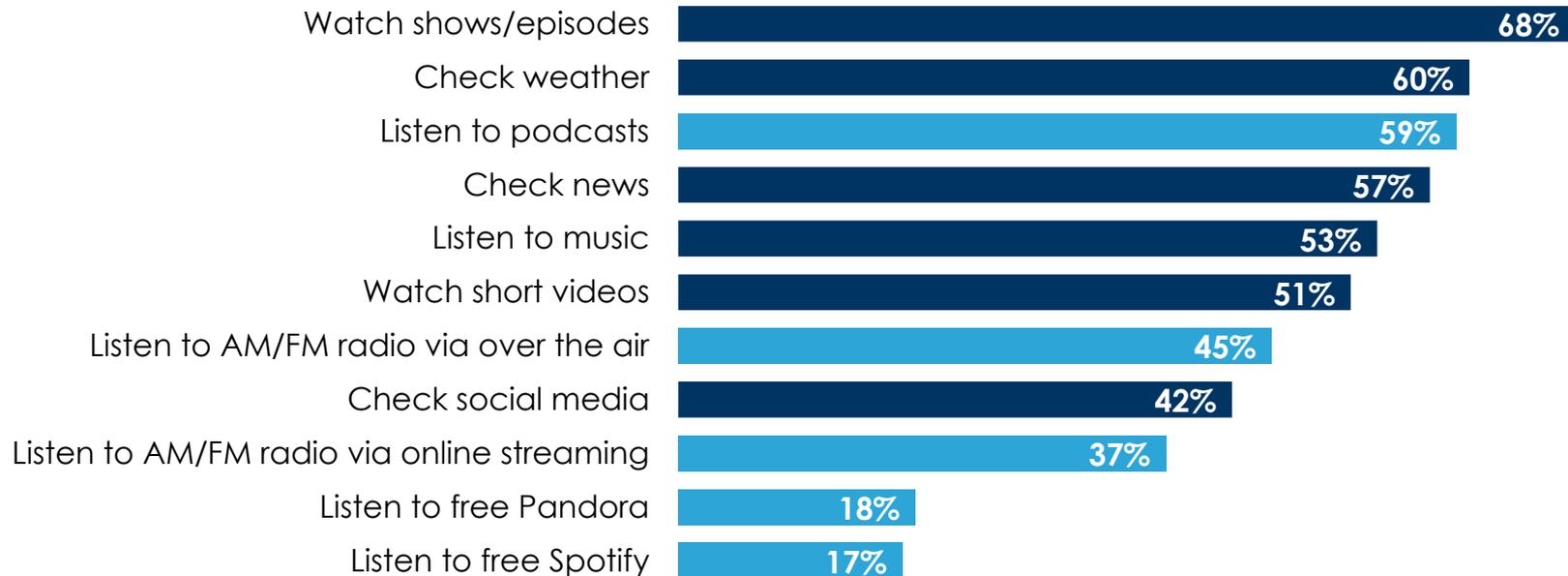
% reporting high levels of concentration (4 or 5 on a scale of 1 to 5 where 1 = not concentrating a lot and 5 = concentrating a lot)



MARU/Matchbox consumer study: Among audio platforms, podcasts exhibit the highest concentration levels; AM/FM radio attentiveness is 2X Pandora/Spotify

Q: Thinking about those times when you do each of the following, how closely are you concentrating on that activity when you are doing it? Please rate the activities on a scale of 1 to 5, where 1 is “Not concentrating a lot” and 5 is “Concentrating a lot.” If you don’t participate in this activity, please select “I don’t do this activity.”

% who said 4 or 5, concentrating a lot

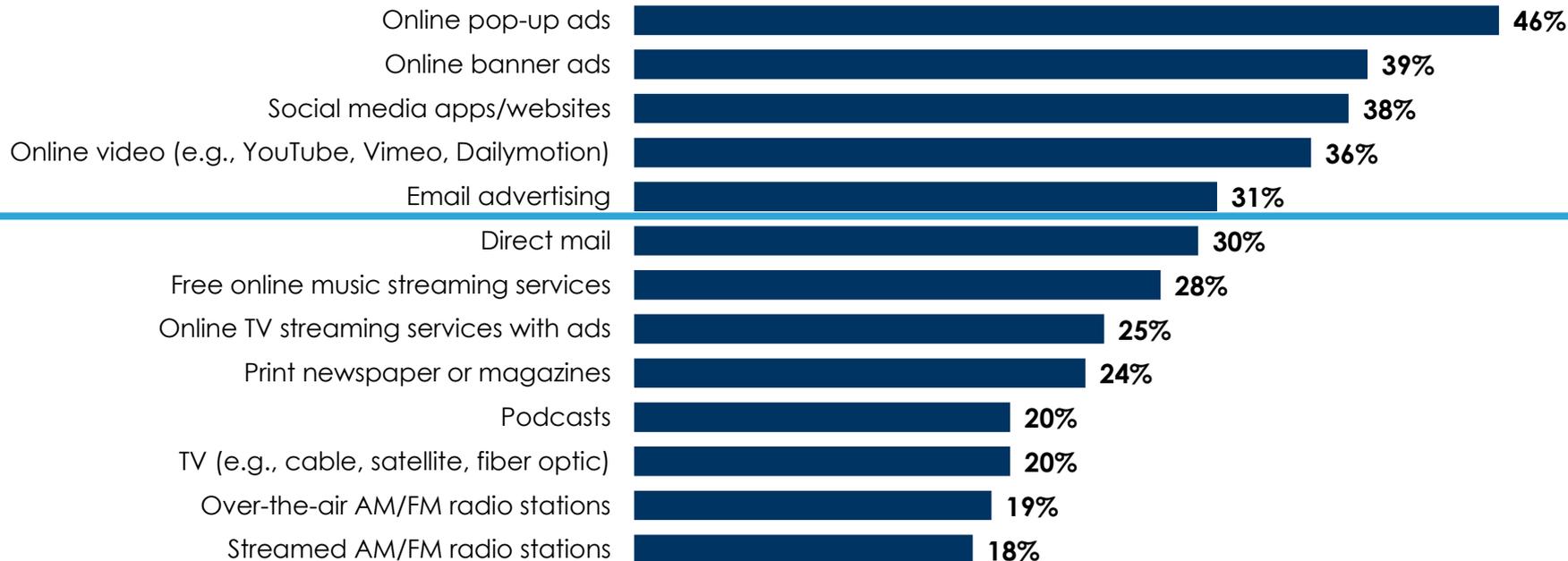


Ad skipping

Consumers skip social and digital ads the most and traditional media ads the least.

Skip the most: Consumers avoid digital ads the most

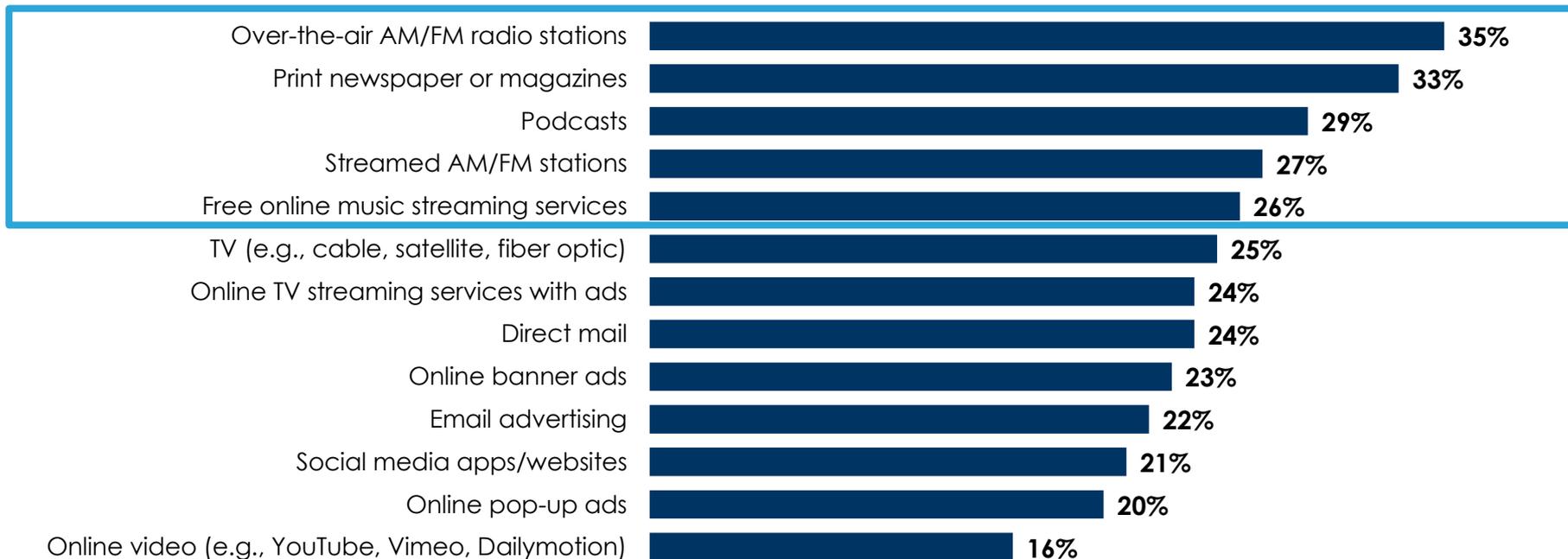
Q: When you come across ads in each of the following places, how often do you actively avoid those ads by skipping, blocking, tuning out, turning away, throwing away, walking away, or otherwise avoiding the ad?
% who said avoided all the time



Source: U.S. Media Attention Study, MARU/Matchbox National Survey, Persons 13+, 1,520 total respondents, September 28, 2021-October 14, 2021; Free online music streaming services = Free online music streaming services (e.g., Spotify with ads, Pandora with ads, AccuRadio)

Skip the least: AM/FM radio, print, and podcast ads lead in attentiveness

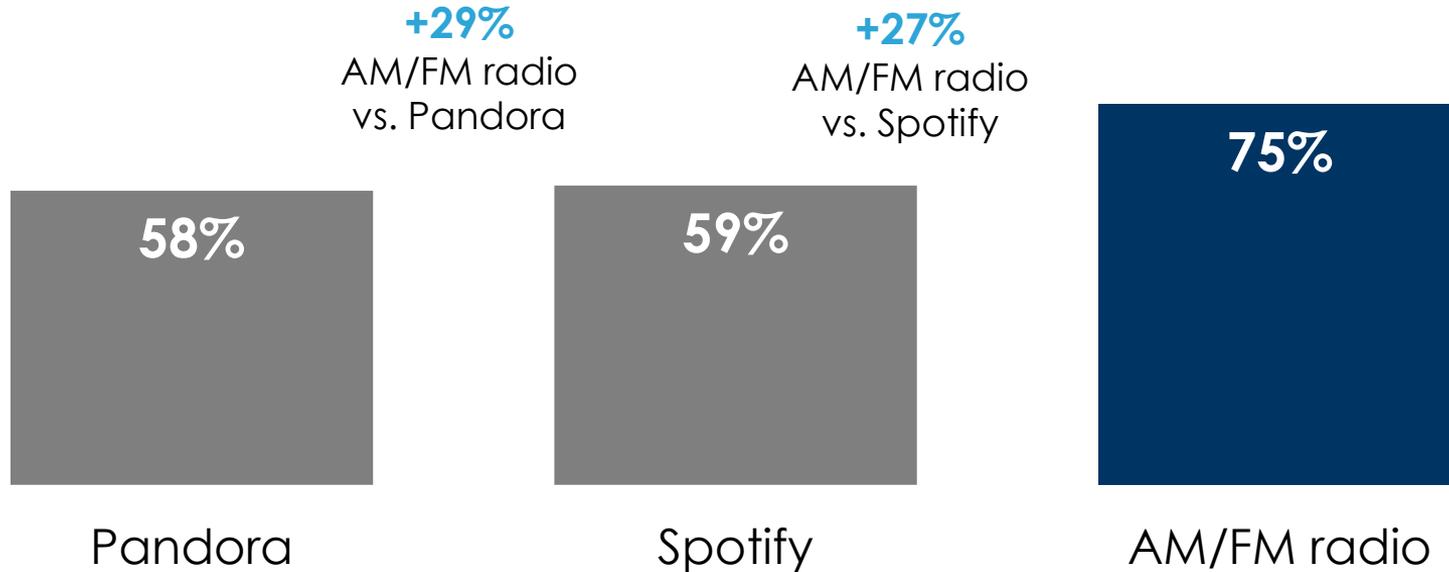
**Q: When you come across ads in each of the following places, how often do you actively avoid those ads by skipping, blocking, tuning out, turning away, throwing away, walking away, or otherwise avoiding the ad?
% who said never or less than half the time**



Source: U.S. Media Attention Study, MARU/Matchbox National Survey, Persons 13+, 1,520 total respondents, September 28, 2021-October 14, 2021; Free online music streaming services = Free online music streaming services (e.g., Spotify with ads, Pandora with ads, AccuRadio)

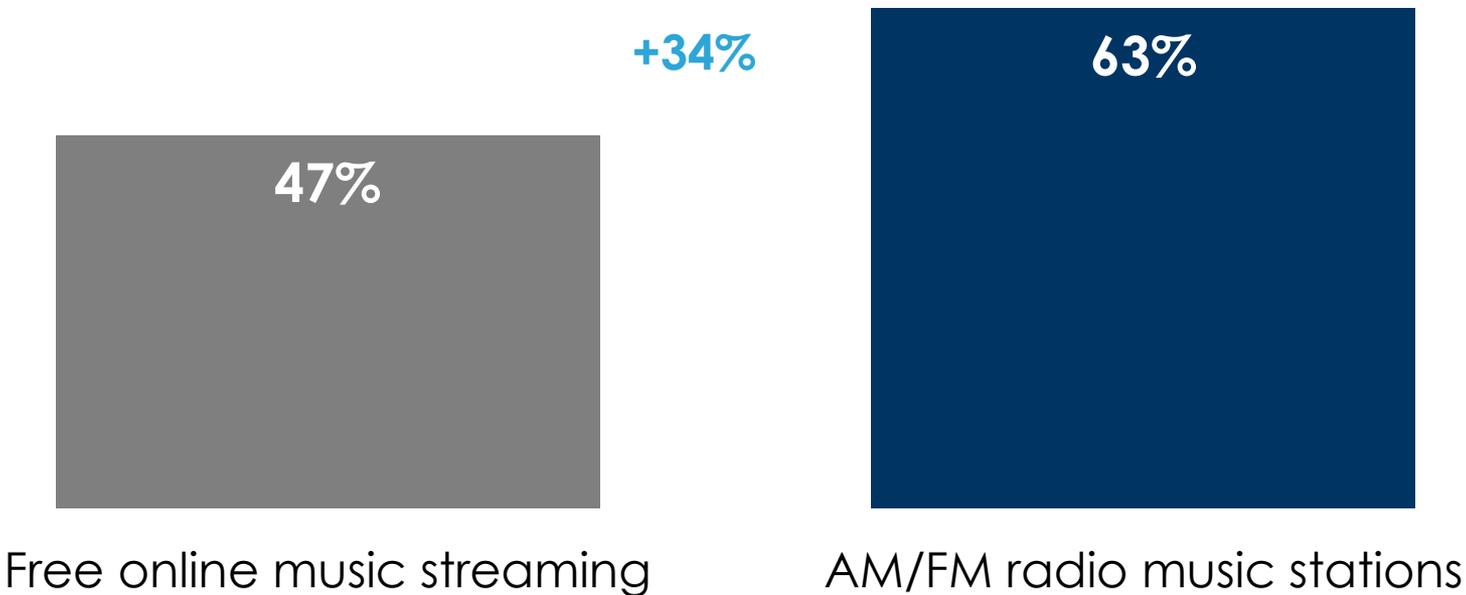
Audibility: Listeners pay more attention to AM/FM radio than Pandora and Spotify

Q: How much attention do you pay while listening to following...
% who said "I can hear what people are talking about when I'm listening to [media type] at home"



Canada: There is a similar attention gap between AM/FM radio and ad-supported free music streaming

Q: How much attention do you pay to what is being said between the music on the following?
Among users of each media, those who said somewhat close attention or extremely/very close attention



Why does AM/FM radio have far greater attentiveness than Pandora and Spotify?

Shared experience with human connection

“‘Real Radio’ is still defined for me by doing what a playlist cannot do—putting together music in an order that is different each time, but not random; telling me what’s happening in my town, or yours; advocating for the music it introduces to me; being punctuated by people who are funny or thought-provoking. **Part of the initial appeal when I began listening, and part of radio’s identifying DNA now, is the shared experience.**”

Sean Ross

VP Music and Programming, Edison Research

AM/FM radio is "**an audio-first shared experience with a human connection.**"

James Cridland

Radio futurologist and editor Podnews

Audio need states

Music streaming entertains, relaxes, and lifts moods. AM/FM radio provides information, connection, and entertainment. Podcasts are about learning, entertainment, and passing the time.

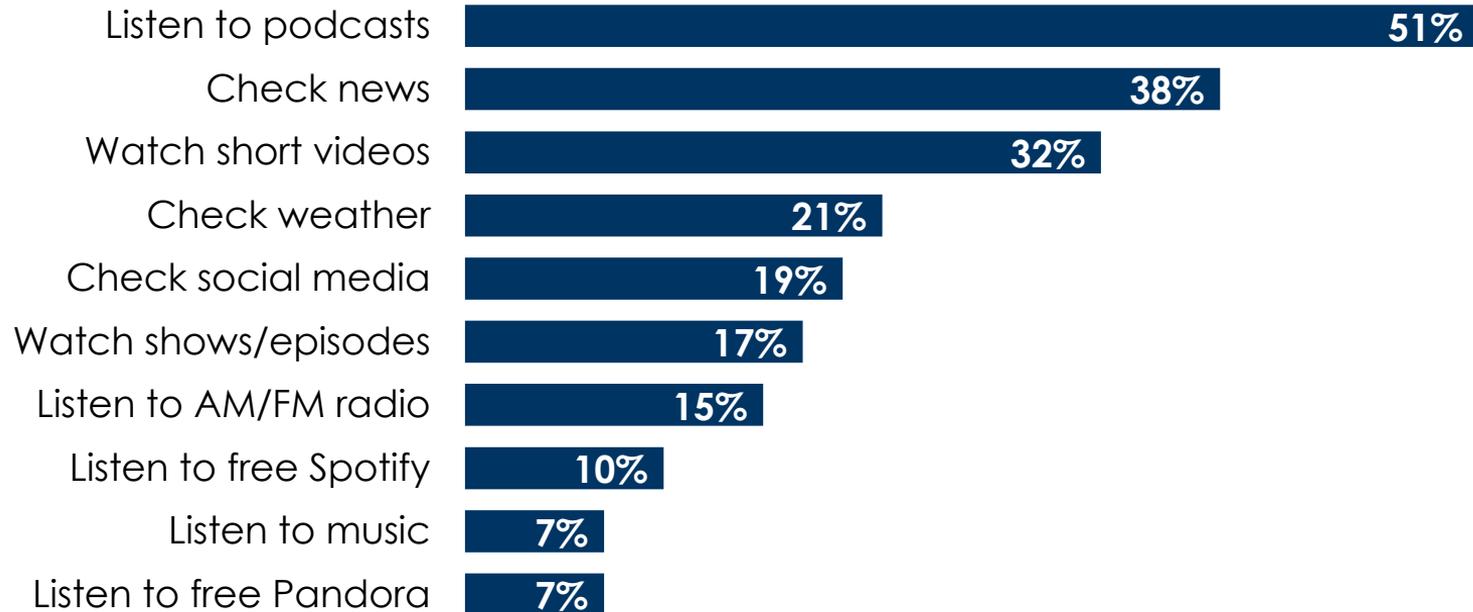
Canada: The top seven need states for each type of audio

AM/FM radio stations	Music streaming services	Owned music (downloaded songs, CDs, vinyl)	Podcasts
To get information	To be entertained	To lift my mood	To learn something new
To feel connected	To relax	To relax	To be entertained
To be entertained	To lift my mood	To be entertained	To pass the time
To pass the time	To amplify/celebrate the moment	To have 'me' time	To get information
To learn something new	To pass the time	To escape	To have 'me' time
For company when I'm alone	To escape	To get motivated	For company when I'm alone
To relax	To get motivated	To amplify/celebrate the moment	To be inspired

Source: Signal Hill Insights, Canada Need States for Audio Study, June 2021. Q: And what kind of audio, if any, do you listen to for each of the following reasons? Base: Canadians age 18+, Weekly listeners to AM/FM radio (n=1,061), Music streaming services (n=940), Podcasts (n=433), Personal music (n=803)

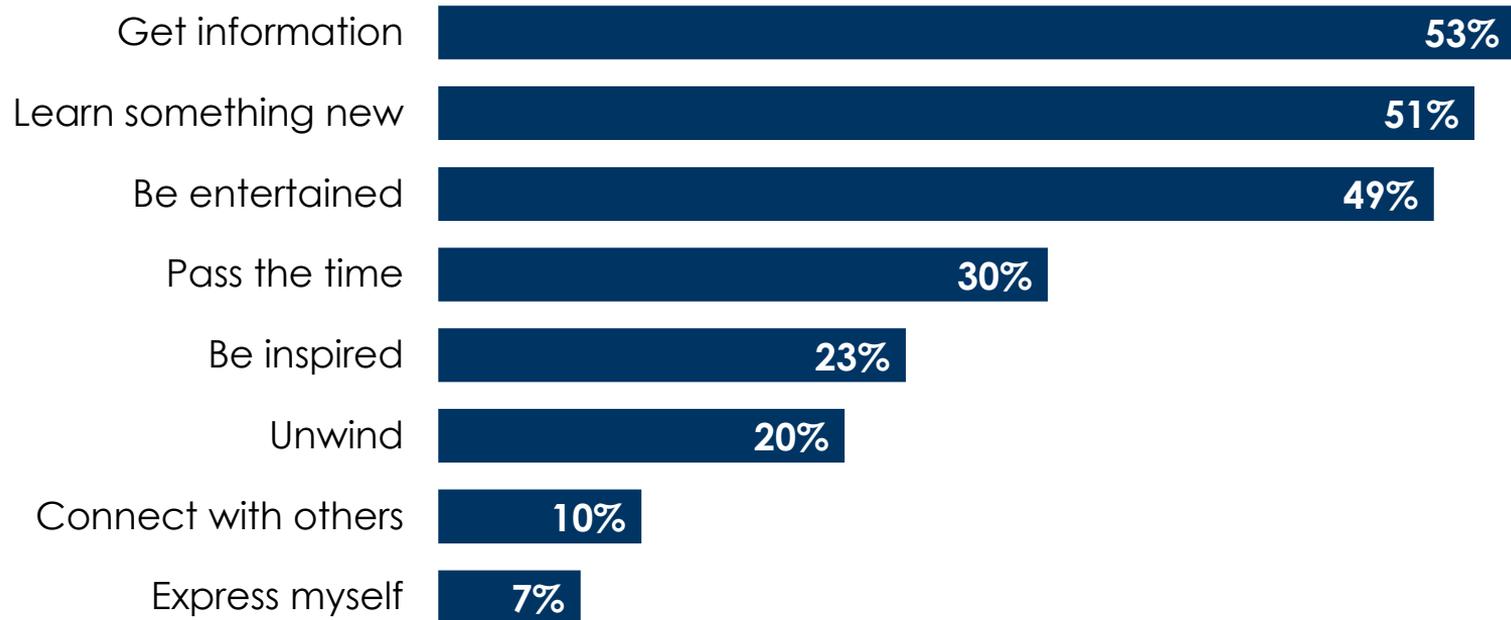
Podcasts are #1 for the “learn something new” need state

Q: Please select all the following reasons why you personally participate in the activities below.
% who said “learn something new”



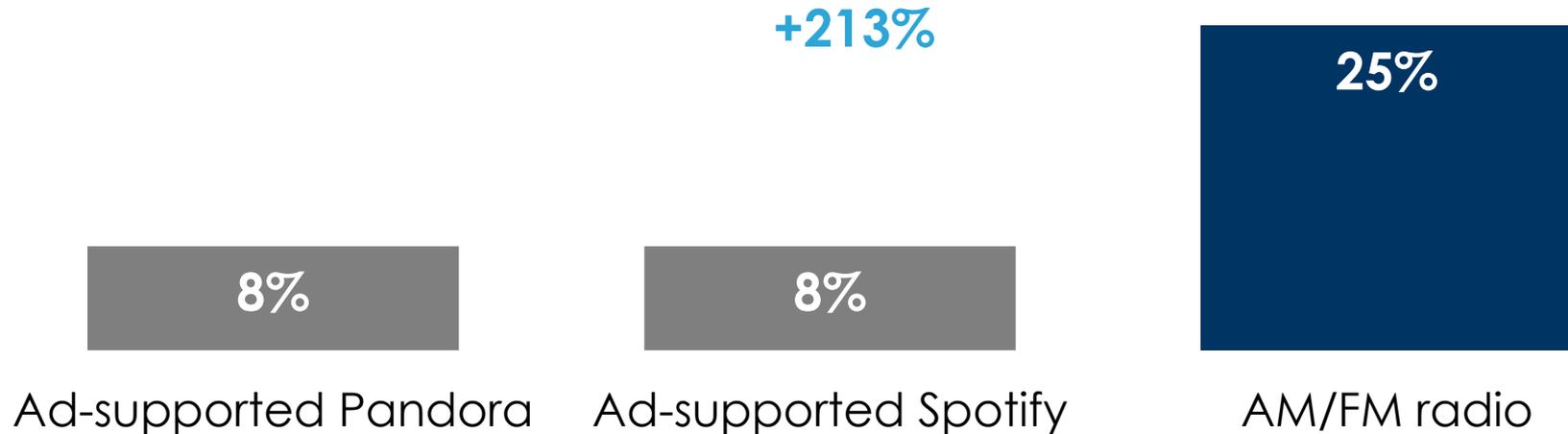
Podcasts are a source of information, learning, and entertainment

Q: Please select all the following reasons why you personally participate in listening to podcasts.



Listeners get information from AM/FM radio more than Pandora and Spotify

Q: Please select all the following reasons why you personally participate in the activities below.
% who said “get information”

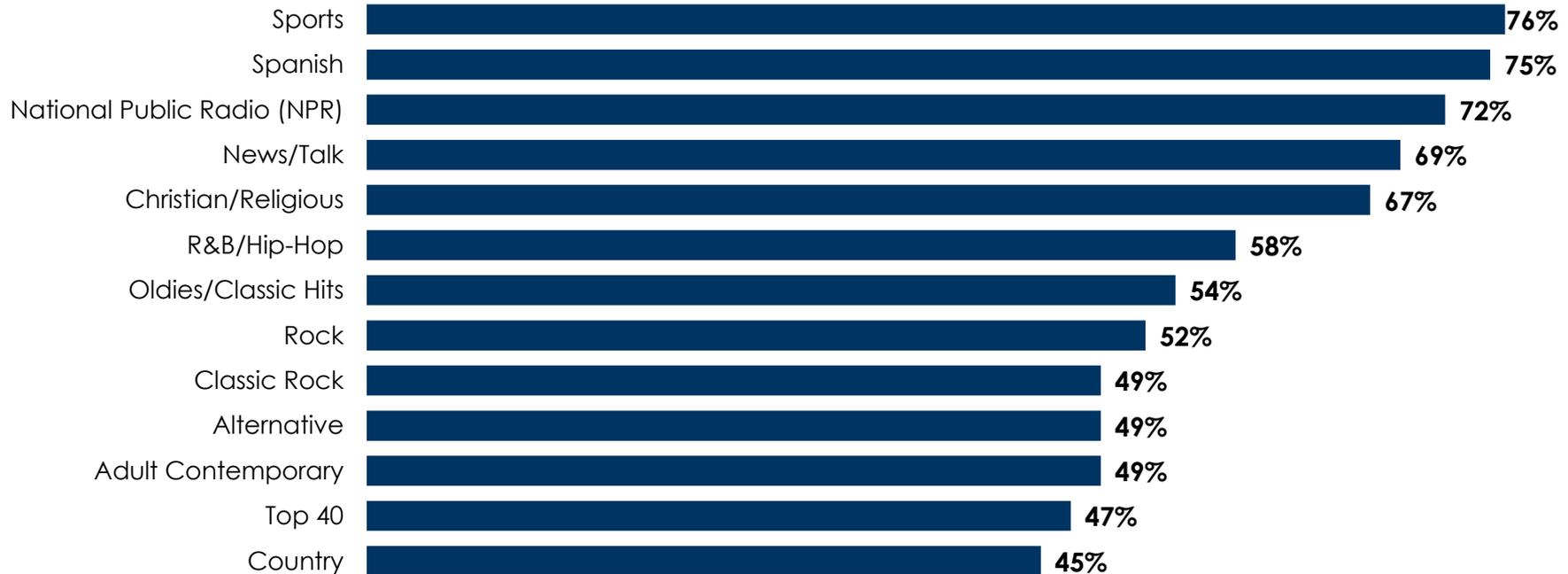


Attentiveness by format

AM/FM radio audiences pay the most attention when listening to Sports, Spanish, NPR, and News/Talk; Spoken word = attentiveness.

AM/FM radio audiences pay the most attention when listening to Sports, Spanish, NPR, and News/Talk; Spoken word = attentiveness

Q: How much attention do you pay while listening to following AM/FM radio stations?
% who said extremely or very close attention



Key takeaways

- **Attention grows in importance among marketers and agencies:** Nearly half of advertisers have discussed consumer attentiveness as a metric. 2-in-3 say it is important for measuring media investments.
- **Social media disconnect:** Agencies/marketers overestimate consumer concentration of social media. Two consumer studies reveal social media has the lowest attentiveness of media platforms.
- **Traditional media ads have greater engagement compared to digital ads:** AM/FM radio, print, and podcast ads lead in attentiveness. Consumers skip social and digital ads the most.
- **Audio platforms satisfy unique need states:** AM/FM radio is associated with information, connection, and entertainment. Podcasts are a source of information, learning, and entertainment. Music streaming entertains, relaxes and lifts moods.

Implications

- **Traditional media impressions are worth more than digital impressions.** Linear TV, print, and audio enjoy much stronger attentiveness than digital platforms. Consumers notice ads in traditional media more and skip ads less.
- **AM/FM radio CPMs should be a premium to Pandora and Spotify:** Pandora/Spotify audio impressions are not the same as AM/FM radio impressions. The greater proportion of spoken word content on AM/FM radio generates much higher levels of concentration and attentiveness. The information and personalities of AM/FM radio satisfy consumer need states for information and connection.
- **High CPMs for podcasts are warranted:** Podcasts generate high attentiveness levels as they satisfy multiple “lean in” consumer need states: information, learning, and entertainment.



Thank You

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