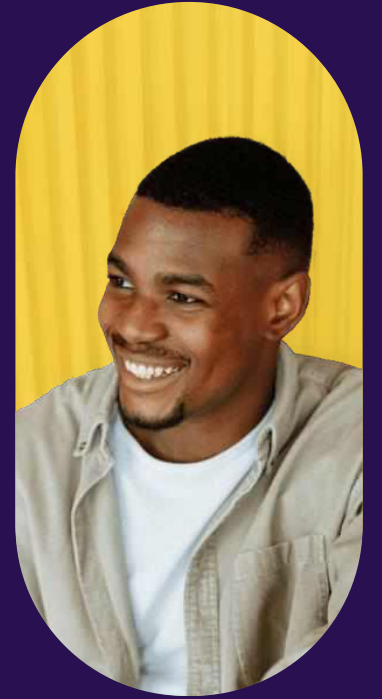


Breaking through fragmented,
yet focused, audiences



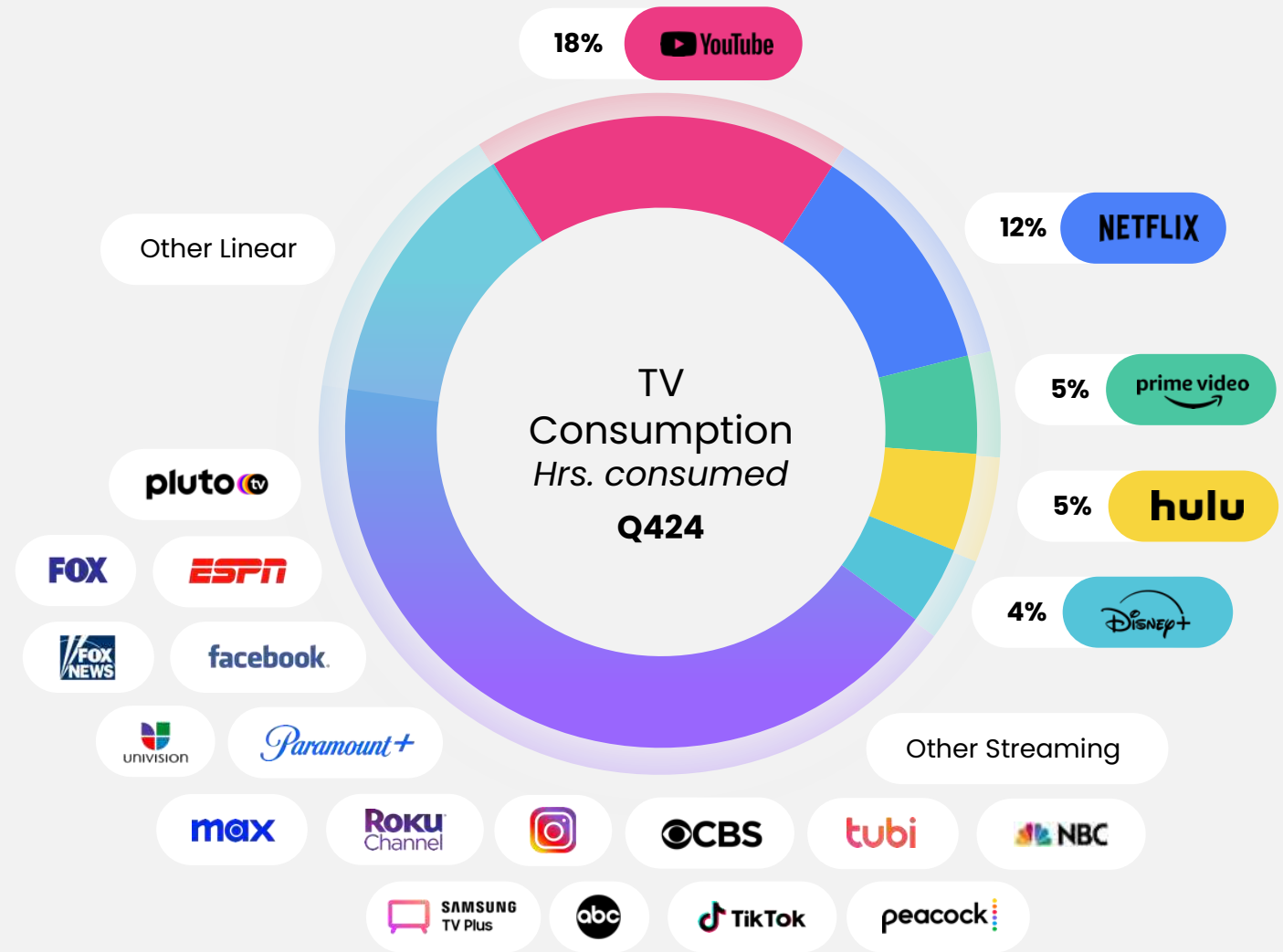
TV Attention, Deconstructed

MAGNA MEDIA TRIALS

Roku

TV viewing is more fragmented than ever

TV audiences are everywhere – from Linear to FAST to AVOD and SVOD



How can advertisers break through in today's divided TV landscape?



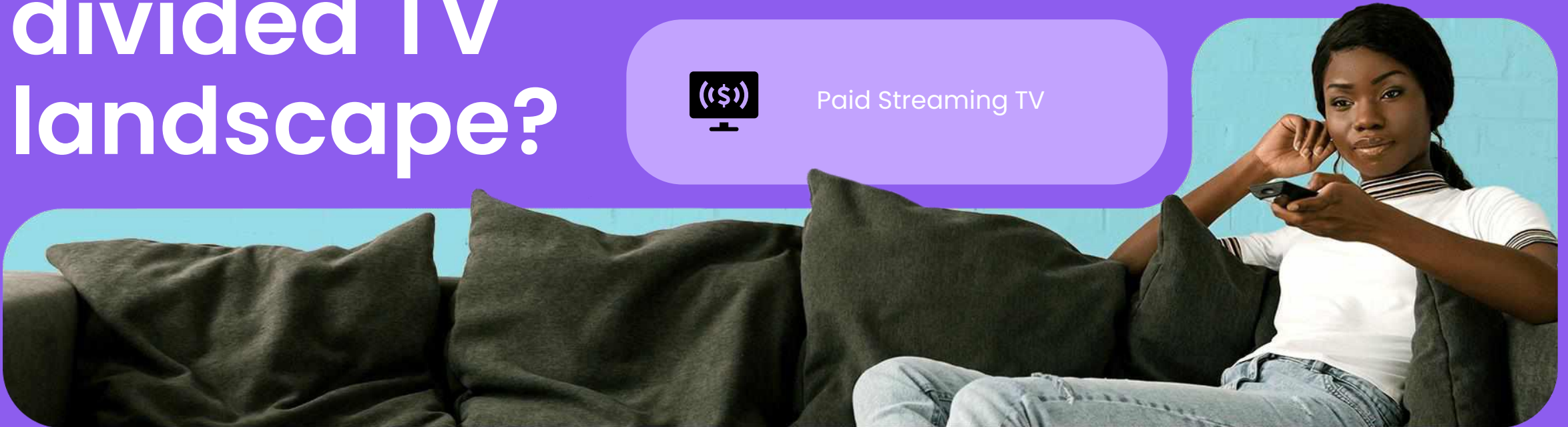
Traditional TV



Free Streaming TV



Paid Streaming TV



TV viewing models

TRADITIONAL TV



LINEAR TV

Live linear with scheduled programming across cable, satellite, and broadcast networks

PAID STREAMING TV



AD-FREE SVOD

Paid on-demand content without ad breaks



AD-SUPPORTED SVOD

Paid on-demand content with ad breaks

FREE STREAMING TV



AD-SUPPORTED VOD

Free on-demand content with ad breaks



FAST

Free live content delivered via an electronic programming grid in ad-supported channels

TV viewing models explored

TRADITIONAL TV



LINEAR TV

Live linear with scheduled programming across cable, satellite, and broadcast networks

PAID STREAMING TV



AD-SUPPORTED SVOD

Paid on-demand content with ad breaks

FREE STREAMING TV



AD-SUPPORTED VOD

Free on-demand content with ad breaks



FAST

Free live content delivered via an electronic programming grid in ad-supported channels

Our Objectives

- Identify peaks in visual ad attention across TV viewing models
- Understand why and when viewers tune in to different TV viewing models

01 Visual Attention Tracking

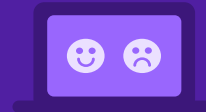
Passively collected data from TVision's opt-in, at-home panel to measure attention to ads across TV viewing models

T»VISION



- 6 months of data
- 129,044 unique ads
- 34,000,318 ads measured
- Q2-Q3 2024

2-PRONGED METHODOLOGY



- N=3,012
- Natural representation across weekday and weekend
- Age 18+

02 Media Diary

A quantitative online diary of TV viewing over the past 24 hours

Attention Metrics:

T»VISION



VIEWABILITY RATE

% of ads in which a viewer was in the room for 1+ cumulative seconds



VISUAL AD ATTENTION RATE

% of ads that receive 2+ seconds of cumulative attention



VISUAL AD ATTENTION %

Portion of the ad's total length that viewers spent actively paying attention



FINDING

01

Capturing peak attention requires diversification

Diversification offers an attention opportunity

Ads get more attention when seen on two models vs. just one

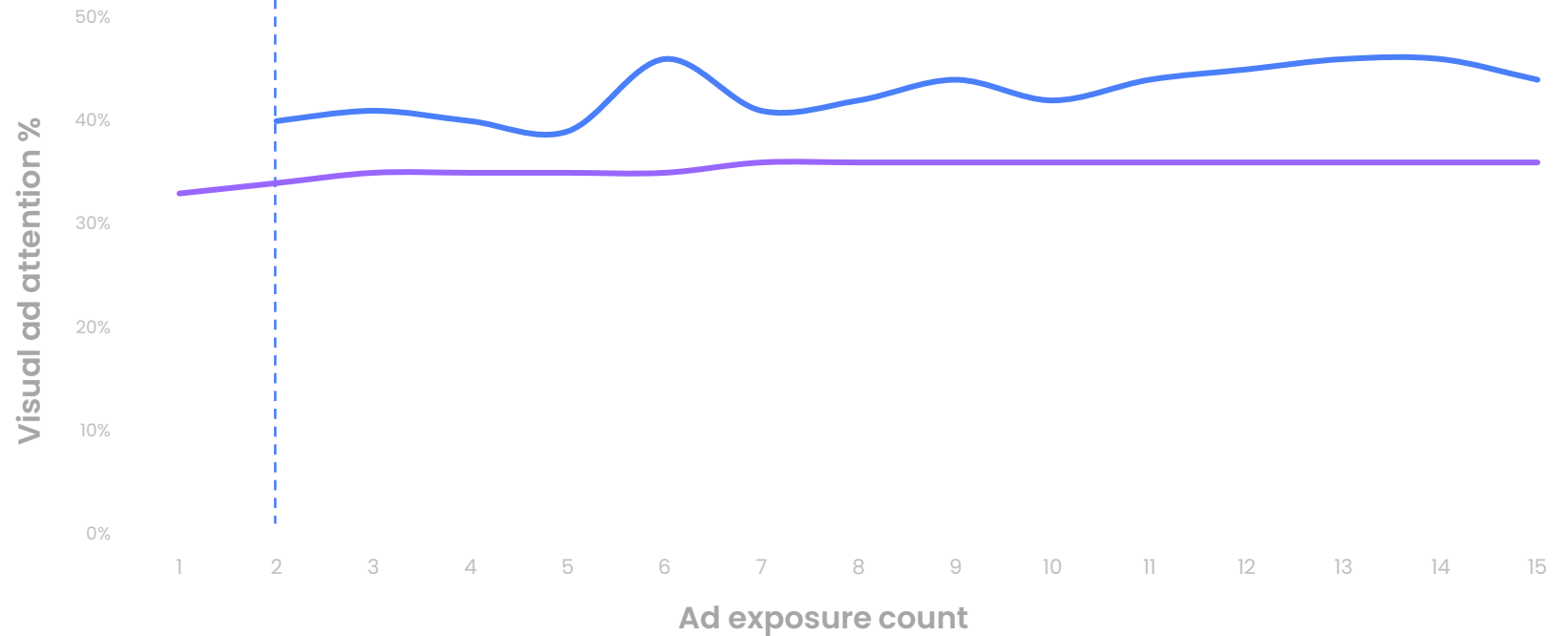
18%

Brands get approx. 18% more attention when the same person sees an ad on two TV models instead of just one – even with only two exposures

Visual Ad Attention %

By frequency of exposure to the same ad

- **One** TV Viewing Model
- **Two** TV Viewing Models



Streamers are always shifting, with more adding subscriptions than canceling

Brands must adopt a multi-platform strategy to reach streamers

Have you done any of the following in the past 3 months?

% Selected | Among all streamers

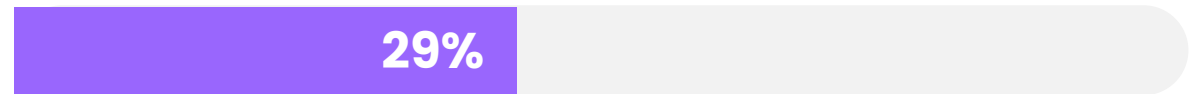
Added a subscription service(s)



Cancelled a subscription service(s)



Modified a subscription service(s)
(i.e., upgraded to a premium version of the service)

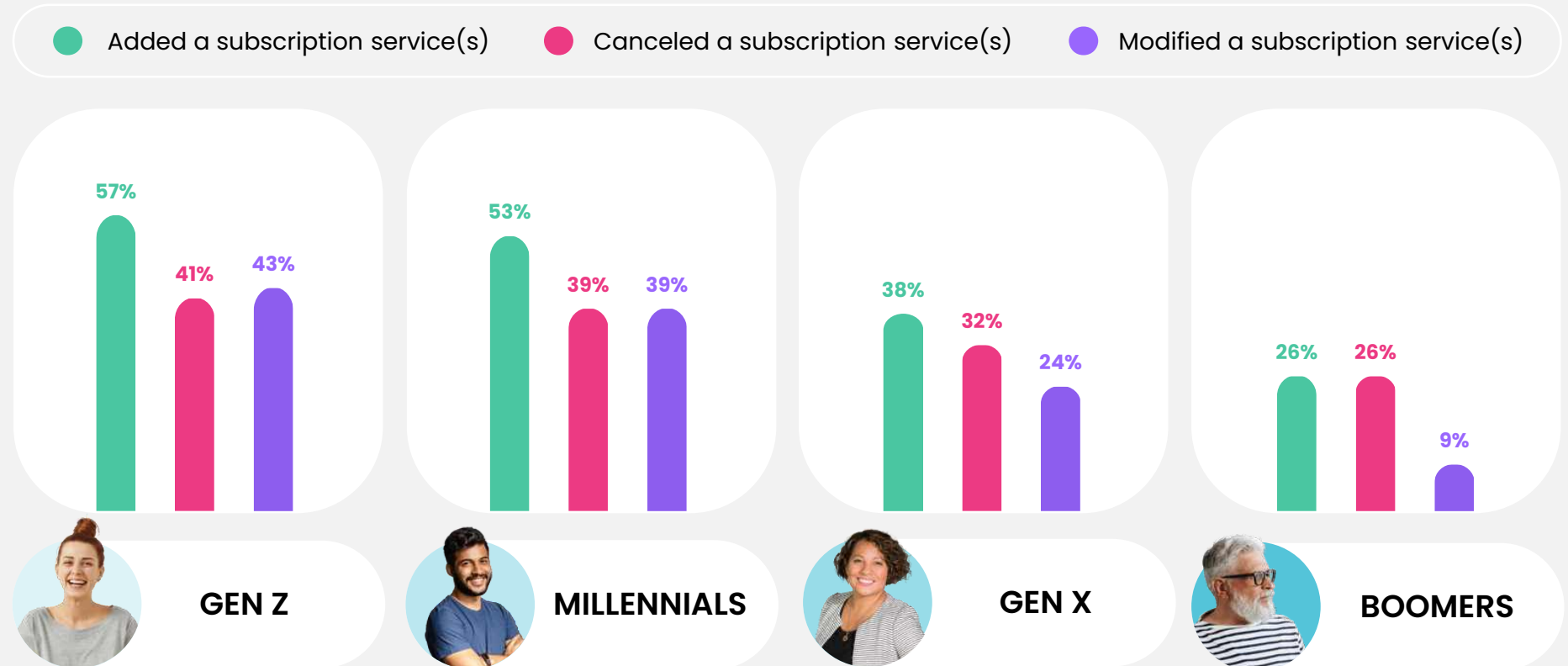


Younger generations: churn-churn-churn!

Churn is universal, but younger generations lead the shift, reinforcing the need for brands to maintain a strong, ongoing presence across TV models to stay top-of-mind

Have you done any of the following in the past 3 months?

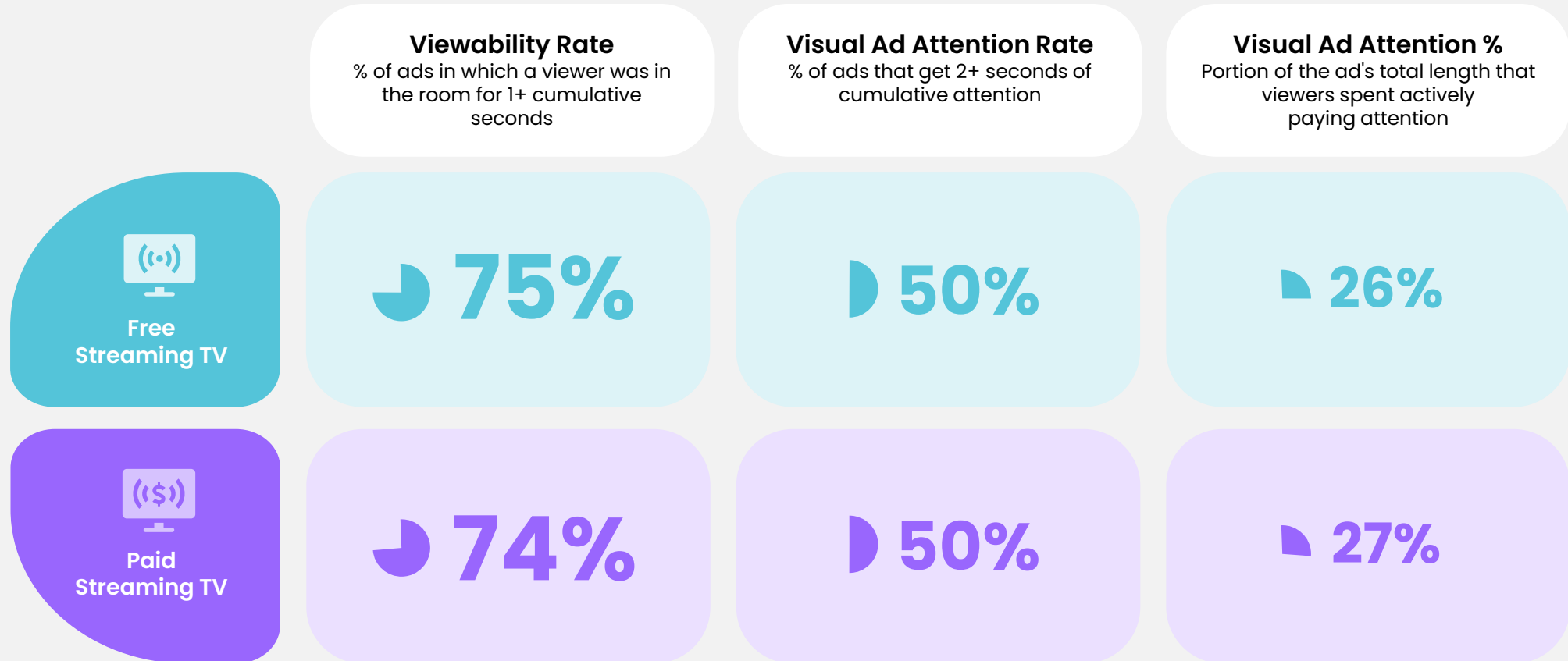
% Selected | Among all streamers



Don't underestimate free streaming



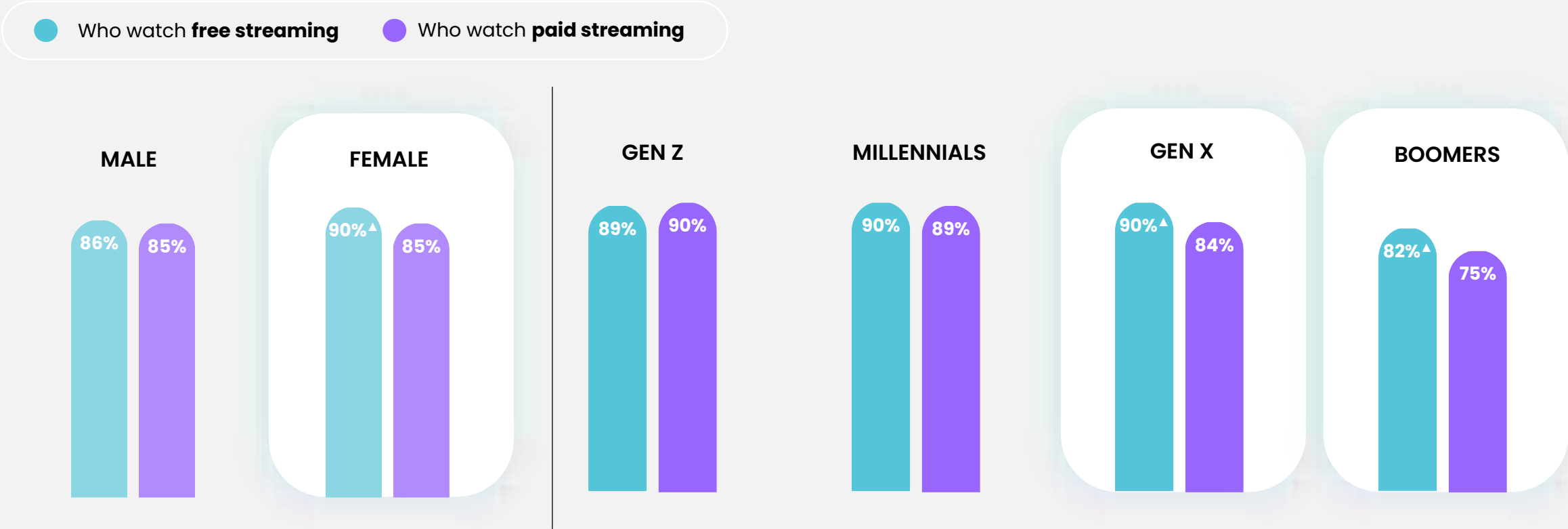
Ads in free streaming command the same level of attention as paid streaming

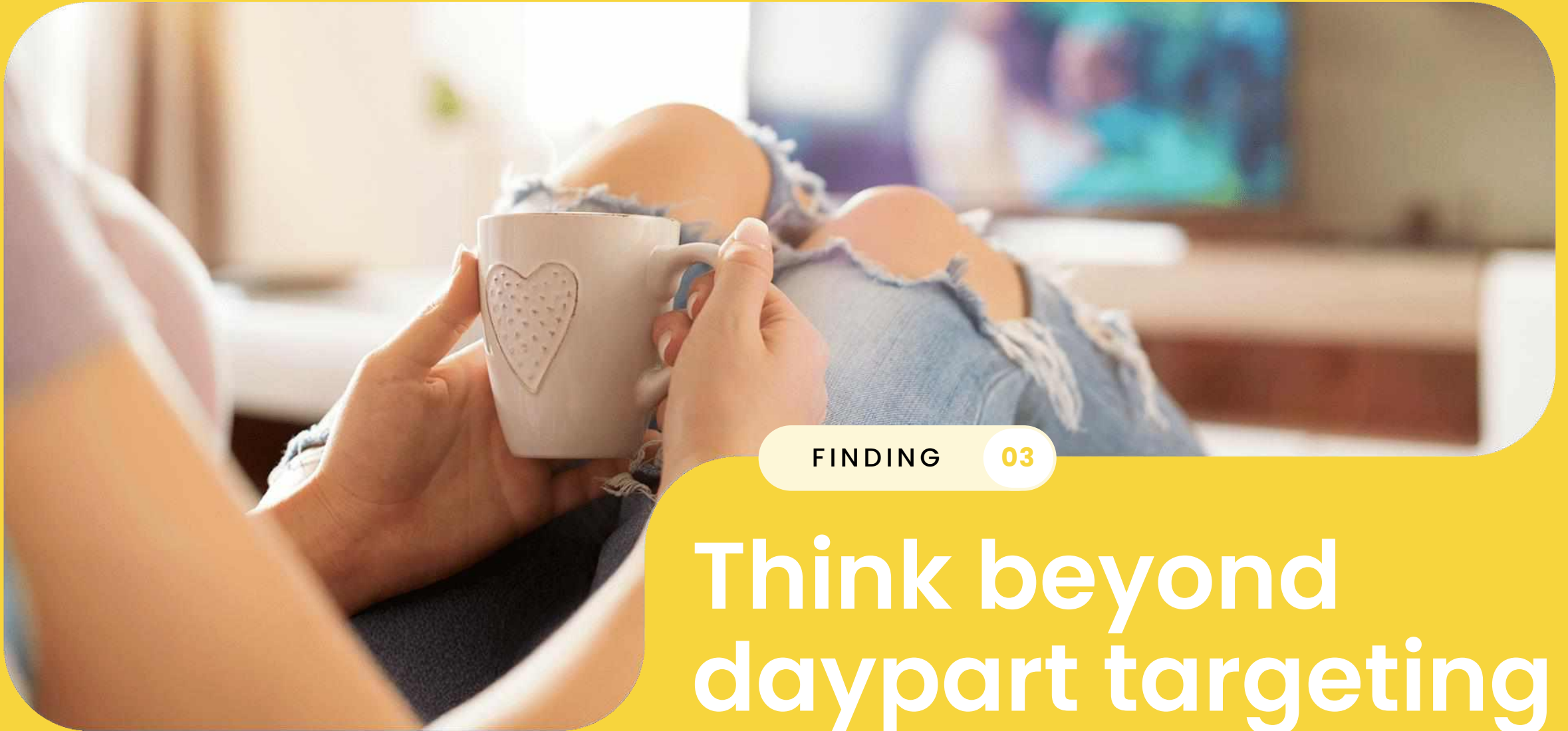


Free streaming extends reach beyond paid, capturing more women, gen X & boomers

Consumption by TV viewing model

% Who watch all the time, frequently or occasionally





FINDING

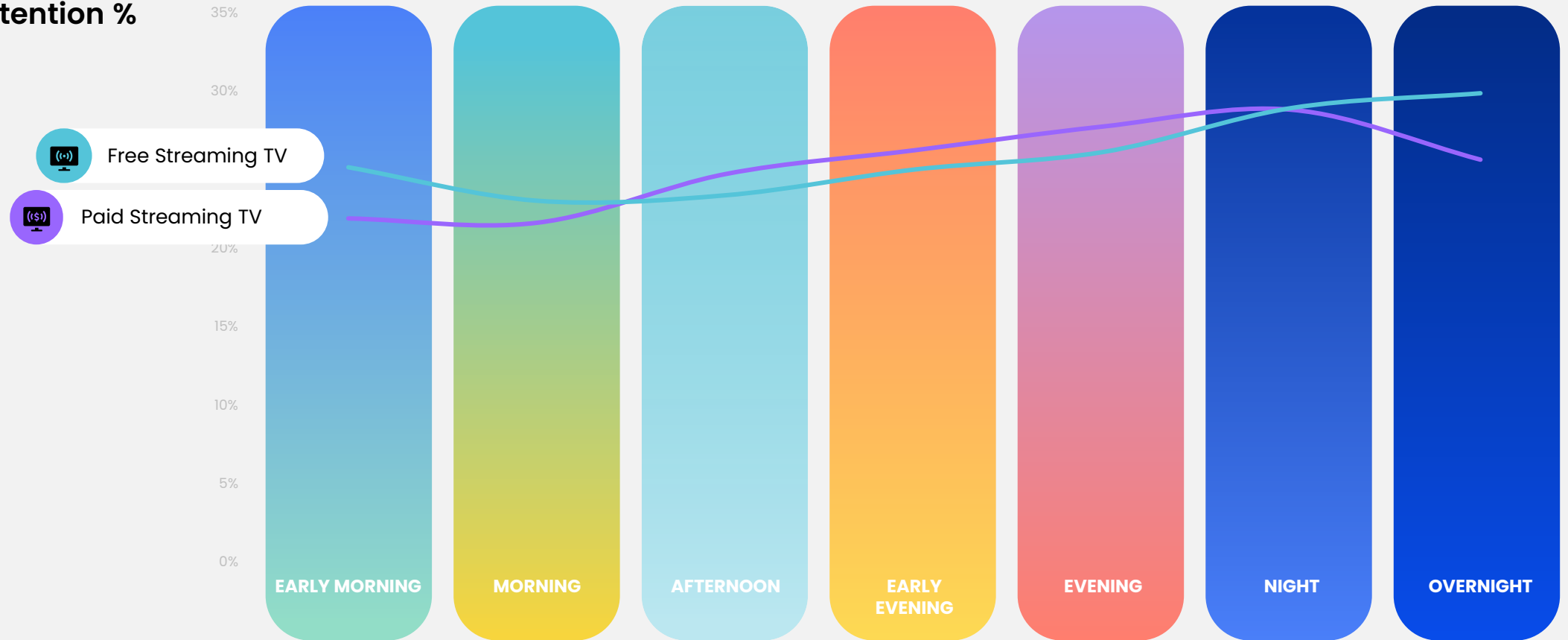
03

Think beyond daypart targeting

Streamers define their own primetime

Streaming defies traditional peak-hour strategies with similar ad attention throughout the day

Visual ad attention %





FINDING

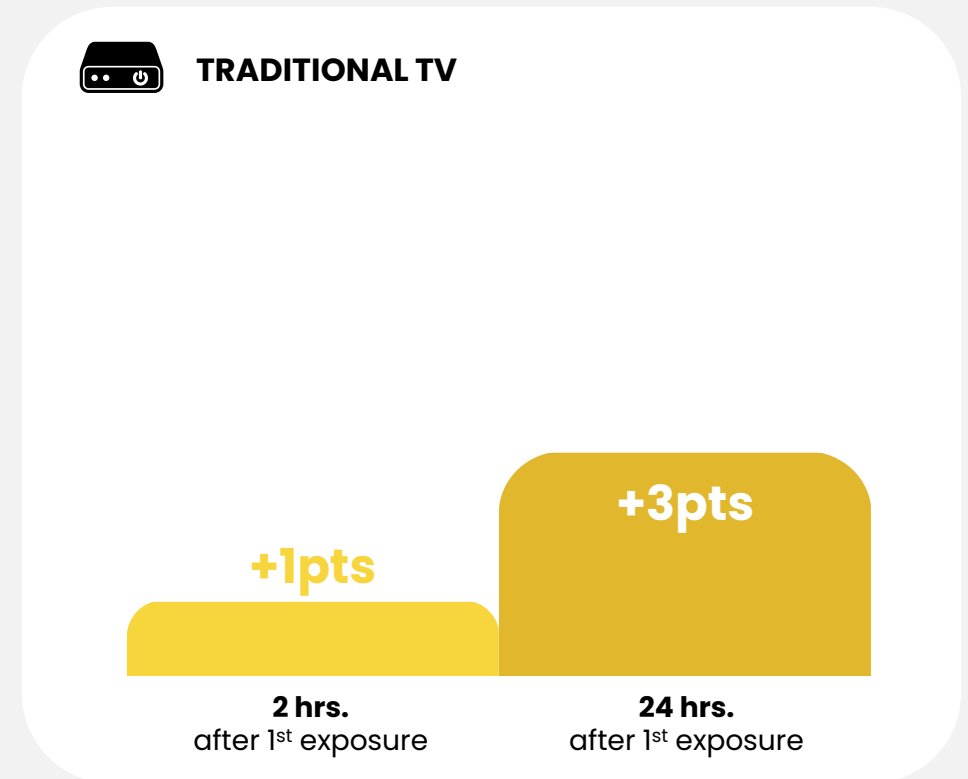
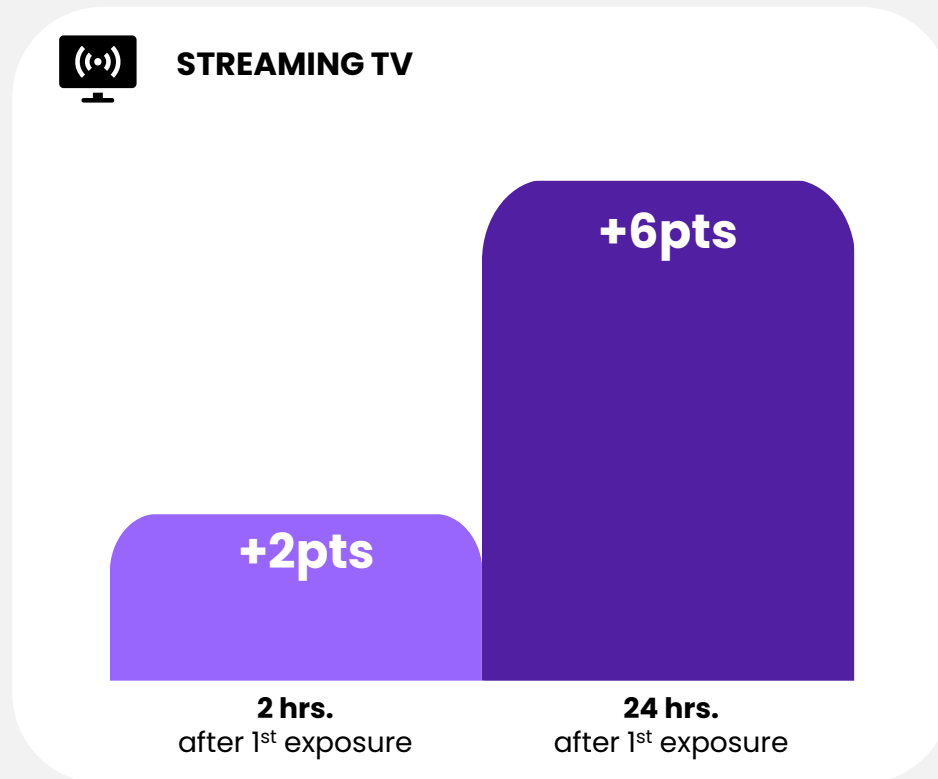
04

Avoid overly condensed exposures

Across TV types, brands lose attention when frequency windowing is too short

Attention gains from timing between repeat exposures

Increase in visual ad attention %

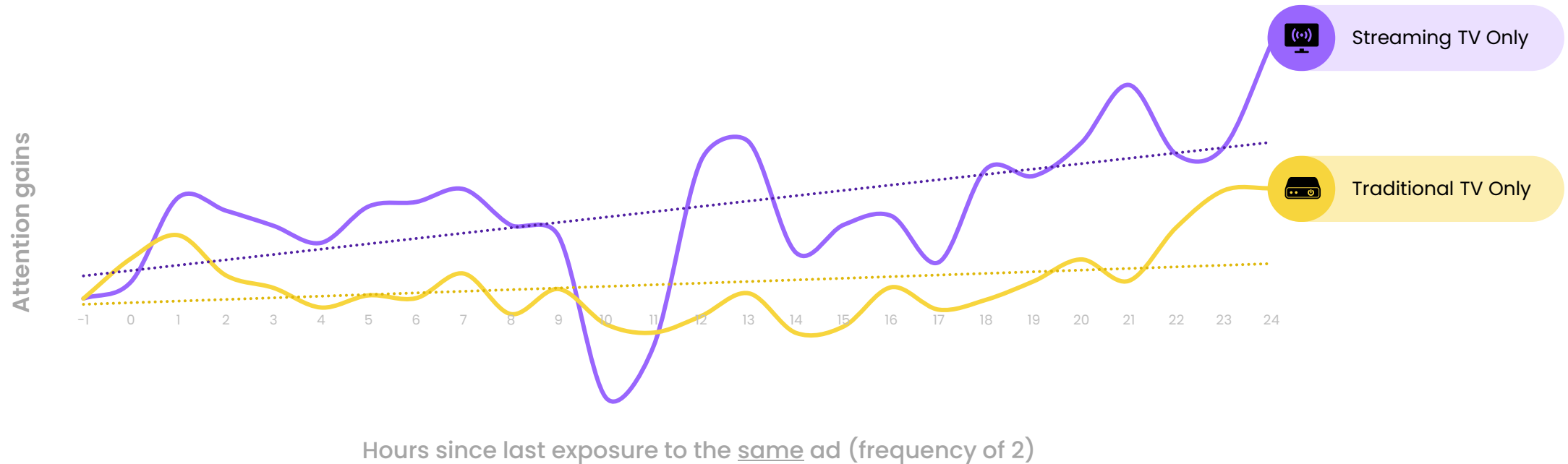


Attention gains from second exposure are higher on streaming vs. traditional TV

Likely because ad load on traditional TV is significantly higher than Streaming, causing ads to get lost in the clutter

Increase in visual ad attention %

Over time since last exposure



Sweet spot
for frequency
windowing is
24 hrs.

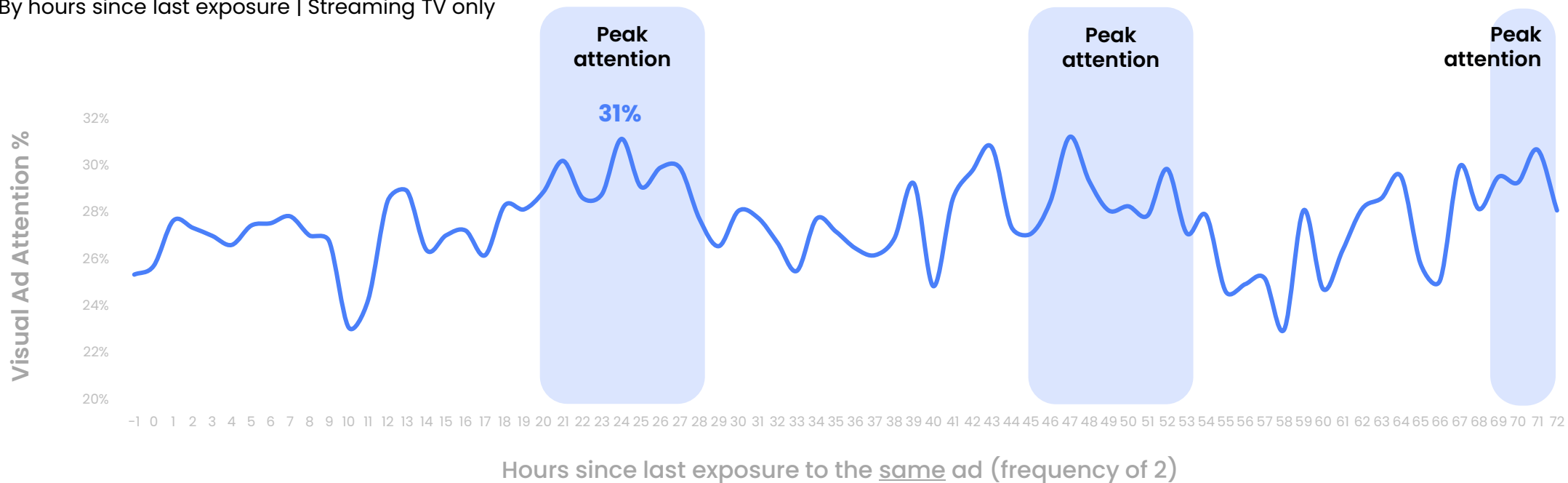


Ad attention peaks every 24 hours

Subsequent ad exposures are most likely to capture attention around 24 hours after the first, likely driven by appointment viewing, when people are paying more attention

Visual ad attention %

By hours since last exposure | Streaming TV only

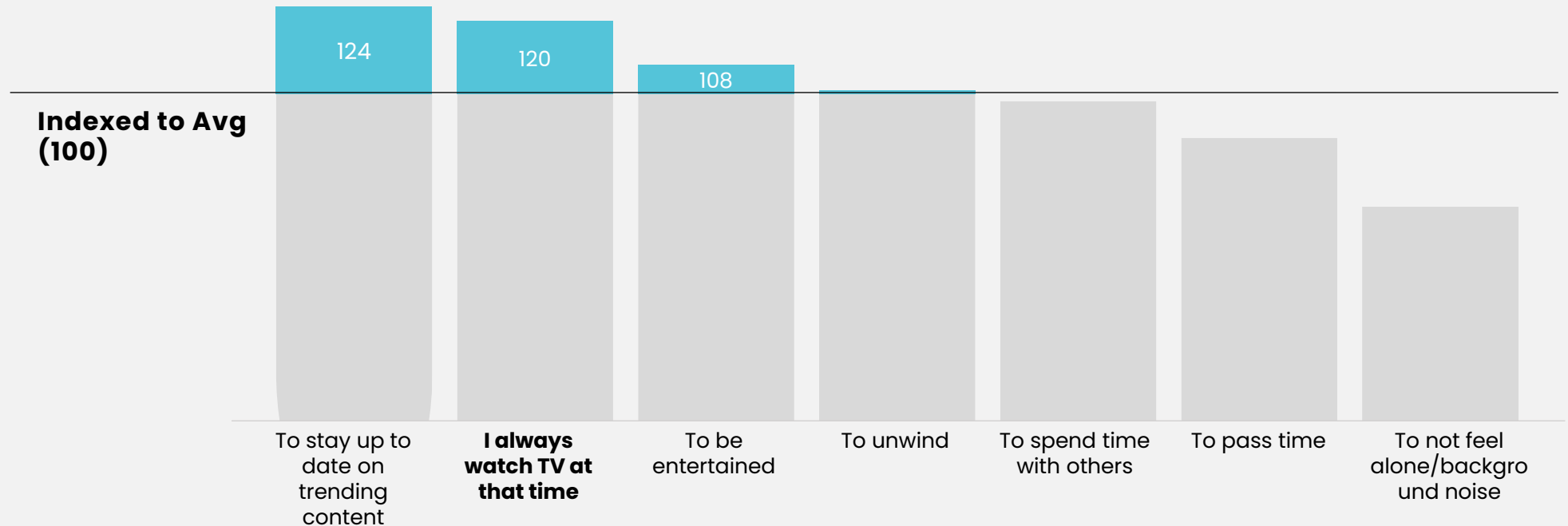


Habit viewing commands high attention

Viewers who watch TV out of habit are 20% more likely to pay full attention to the content compared to the overall average

Self-reported attention to content by motivation

% who gave their full attention



A photograph of a man and a woman sitting closely together on a light blue sofa in a bright, modern living room. The man is wearing a brown cardigan over an orange shirt and blue jeans, while the woman is wearing a grey sweater and white pants. They are both smiling and looking towards the right. In the background, there is a white ornate piano, a wooden coffee table with a plant and mugs, and a window with white curtains. The floor is made of light-colored wood.

FINDING

06

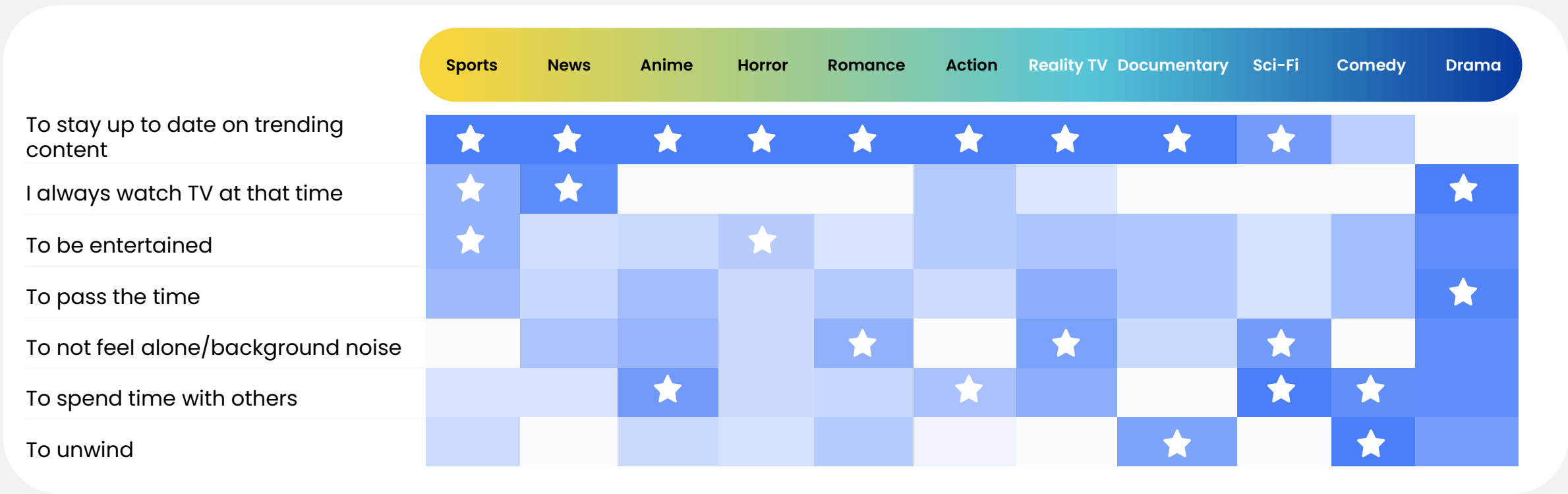
Match message to motivation

Motivations vary by genre, offering opportunity to align creative

For example, Comedy viewers are primarily looking to unwind, making it a great environment for lighthearted, humorous creative that matches their mood


Motivations for watching by genre

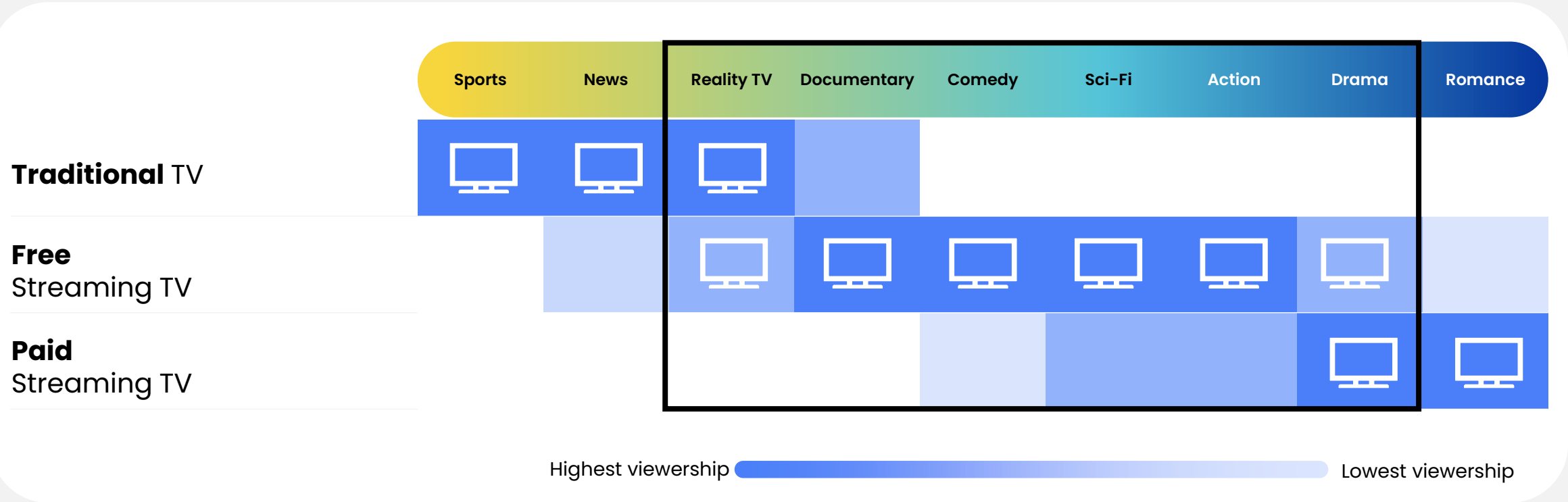
★ : Dominant motivations by genre | Across all TV viewing models



Advertisers can plan to reach different genres by TV models

TV viewing models used for each genre

 : Most used TV model





FINDING

07

Use homepage ads to reach free streamers in discovery mode

Free streamers begin their journey open to discovery

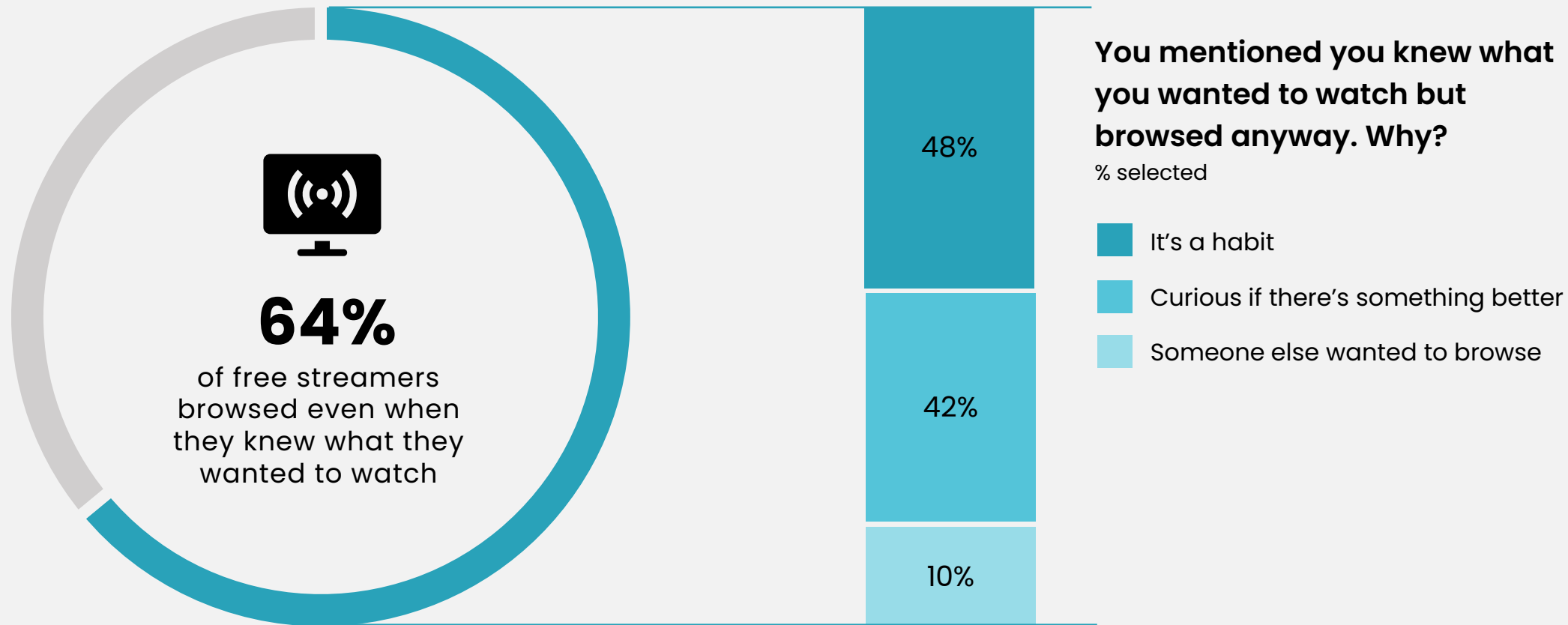
Viewers of free streaming TV are more likely to browse and explore

Did you browse before watching?

% Browsed



Even those who know what they want to watch explore



Homepage ads are more memorable on free streaming than paid

Free streamers are 78% more likely to recall seeing ads on the homepage, making homepage ads worth a premium

Index of free streaming vs. paid streaming viewers (100)

• *Those who recalled seeing ads on the homepage*

178



Implications

Diversify for peak attention

Benefits of diversification extend beyond reach alone; it maximizes visual attention. Free streaming, in particular, can help extend reach and garner attention

01

Think beyond day-part

For highest attention, think beyond day-part targeting and tap into the streamer mindset for creative strategy

02

Consider frequency windowing

Overloading viewers with back-to-back ads isn't effective. Strategic spacing is important for effective ad attention – 24 hrs. is the sweet spot

03

Thank You

