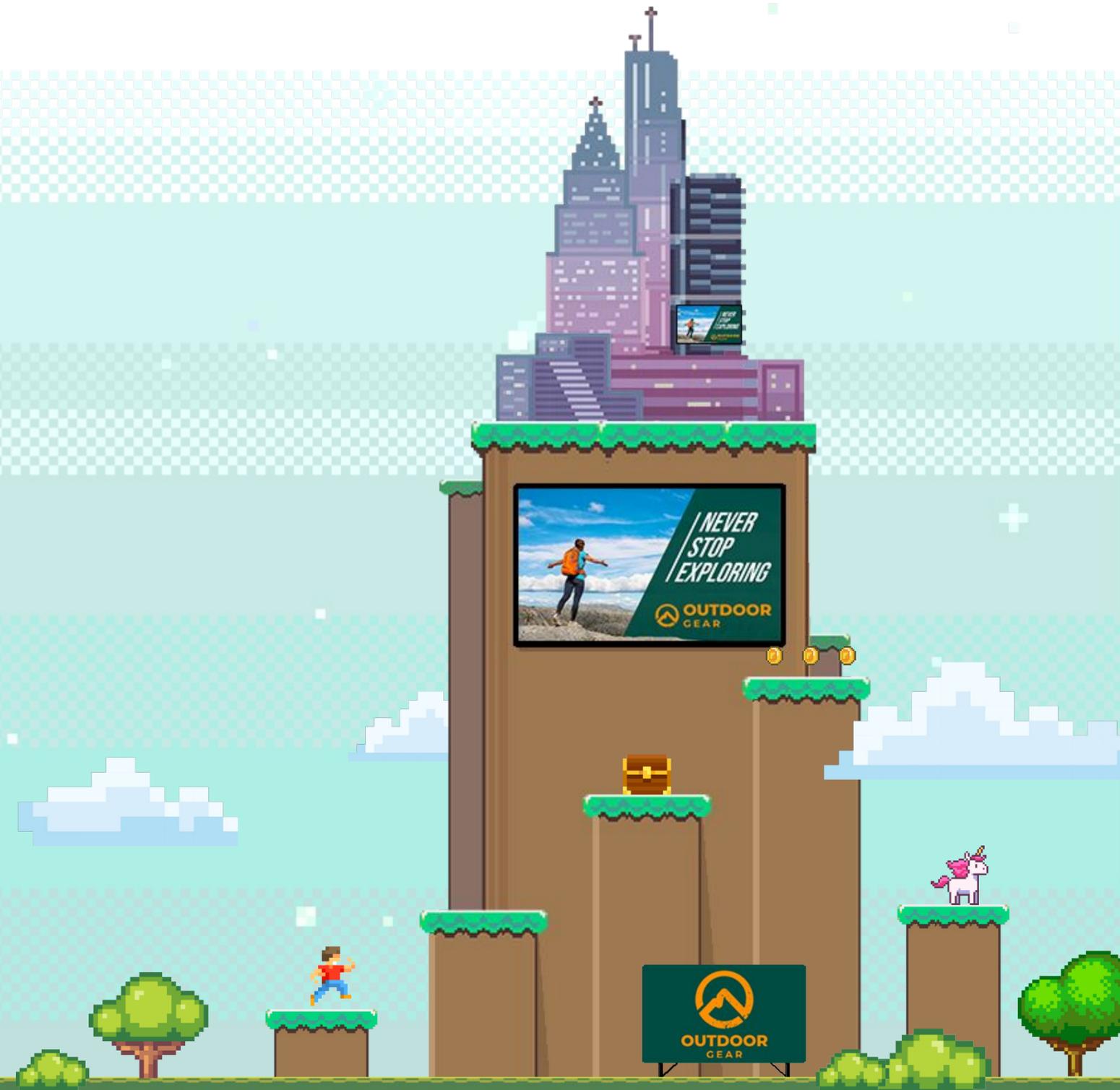


ARE YOU PAYING ATTENTION?

**HOW GAMING SETS A HIGHER
BAR FOR ADVERTISING
ENGAGEMENT**

IN-GAME ADVERTISING REPORT 2023



INTRODUCTION

HOW EFFECTIVE IS GAMING AS AN ADVERTISING MEDIUM?

We live in an [attention economy](#) with a lot of content at our fingertips. However, popular pastimes, including TV, music, social media, and surfing the web are all subject to distraction and an **active avoidance of ads**.

The average global ad-blocking rate is now [at 37%, 52% of all consumers](#) stop paying attention when ads come on the TV, and [65% of people skip video ads](#). Unsurprisingly, this has put into question the **quality and value of ad delivery** and media impressions.

In contrast, we know that gaming is a [captivating, immersive, and lean-forward medium](#). **Gamers don't multitask** and dedicate time and space to their gaming experience. Gaming is also a **powerful source of identity**, competition, community, and cultural currency.

We partnered with Lumen to conduct **an extensive research study**, delving into in-game campaigns from **market-leading brands** to answer several questions, including;

- Does the focus on gameplay extend to advertising?
- Does capturing gamers' attention leave a lasting impression?
- How do attention and recall relate to brand preference and purchase intent?

This data-driven report is an excellent insight into the power of gaming, and I hope you find the results as interesting as I have.



ITAMAR BENEDY
Co-Founder & CEO
Anzu



ABOUT ANZU AND LUMEN

“As the in-game advertising market grows, advertisers are asking harder questions of this increasingly vital marketing channel. In response, Anzu has collected more attention data than any other in-game advertising platform. This extensive research has revealed the sheer power of the platform in driving visual attention and brand recall.”



Mike Follett
CEO Lumen Research



Anzu is the most advanced cross-platform intrinsic in-game ad solution for mobile, PC, console, and the metaverse.



Lumen is the only end-to-end attention technology company that combines the power of eye-tracking and machine learning to plan, activate, measure, and optimize advertising campaigns.

We have been working with Lumen for two years and have **delivered over 25 brand studies** enabling us to provide guidance on the effectiveness of in-game advertising. This report outlines the results from this proprietary data set, highlighting the attention impact and how this translates to brand recall and purchase intent.

OVER **25** BRAND STUDIES
In 2021 - 2022

HOW WAS THE RESEARCH CONDUCTED?

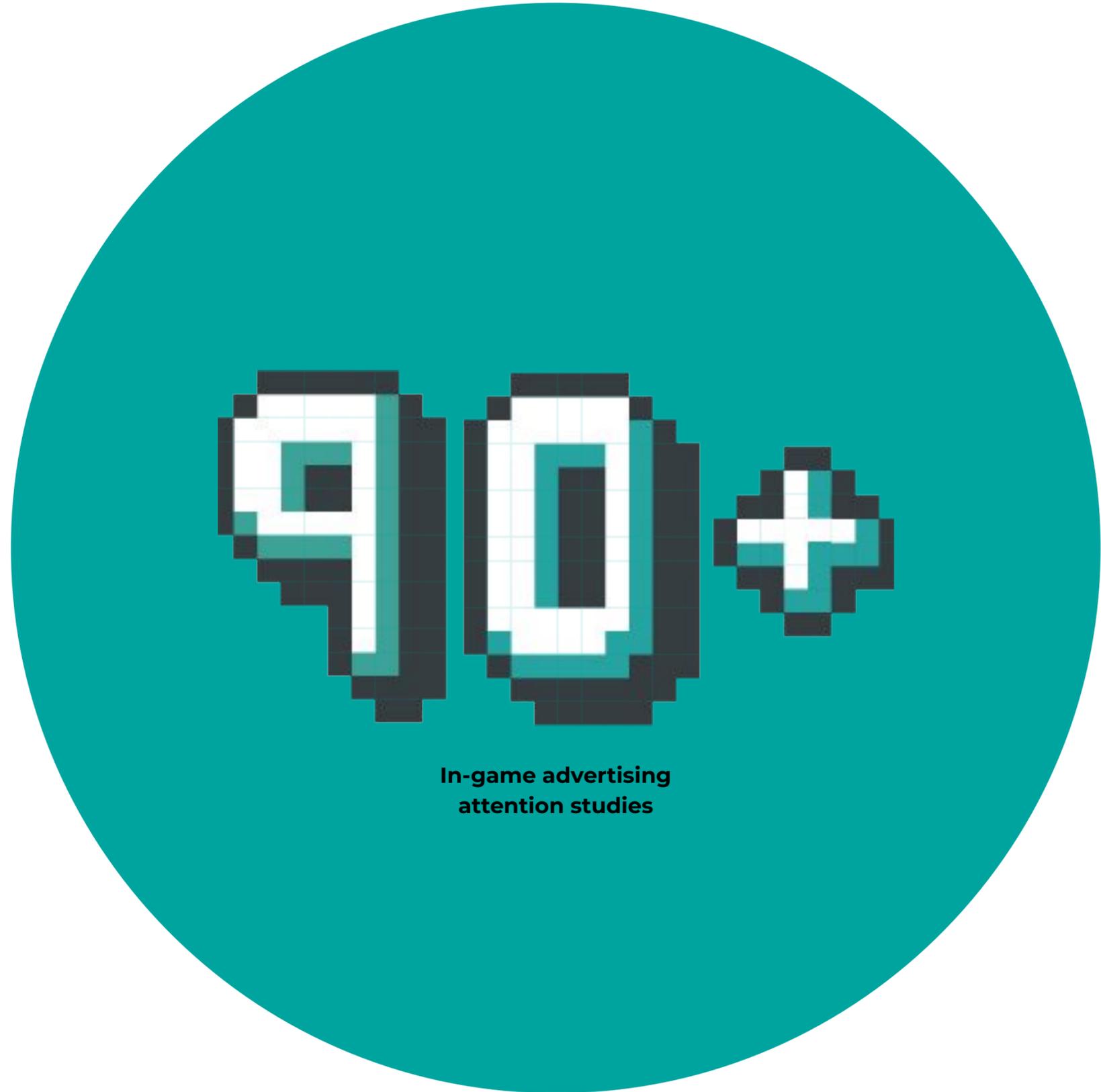
Along with the 25 Anzu studies, Lumen used data from over 90 other in-game advertising attention studies.

This research benefits from this unique dataset's generic gaming industry norms.

Lumen studies use a **forced exposure test vs. control approach** which allowed us to isolate the impact of Anzu's in-game advertising on brand metrics.

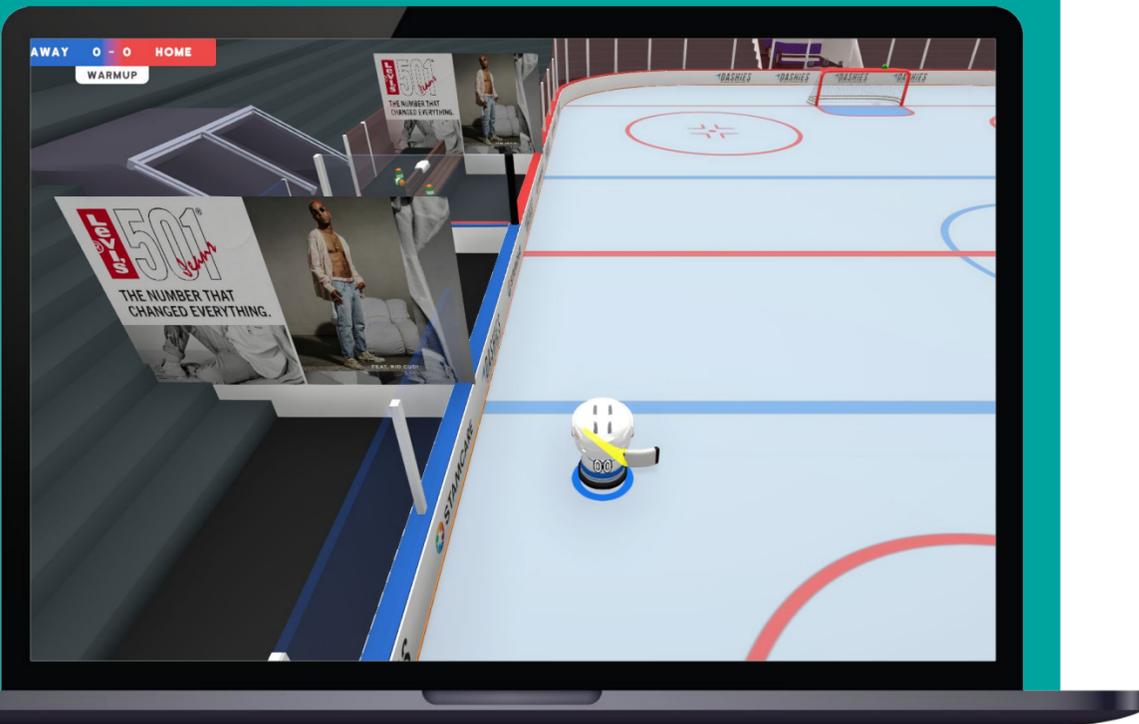
They also use eye tracking technology, with data coming from real measurements, which are **important for measuring attention rather than claimed behaviors**.

The same core questions were used across all the brand studies, **enabling direct comparisons across and within studies**.



HOW WAS THE RESEARCH CONDUCTED?

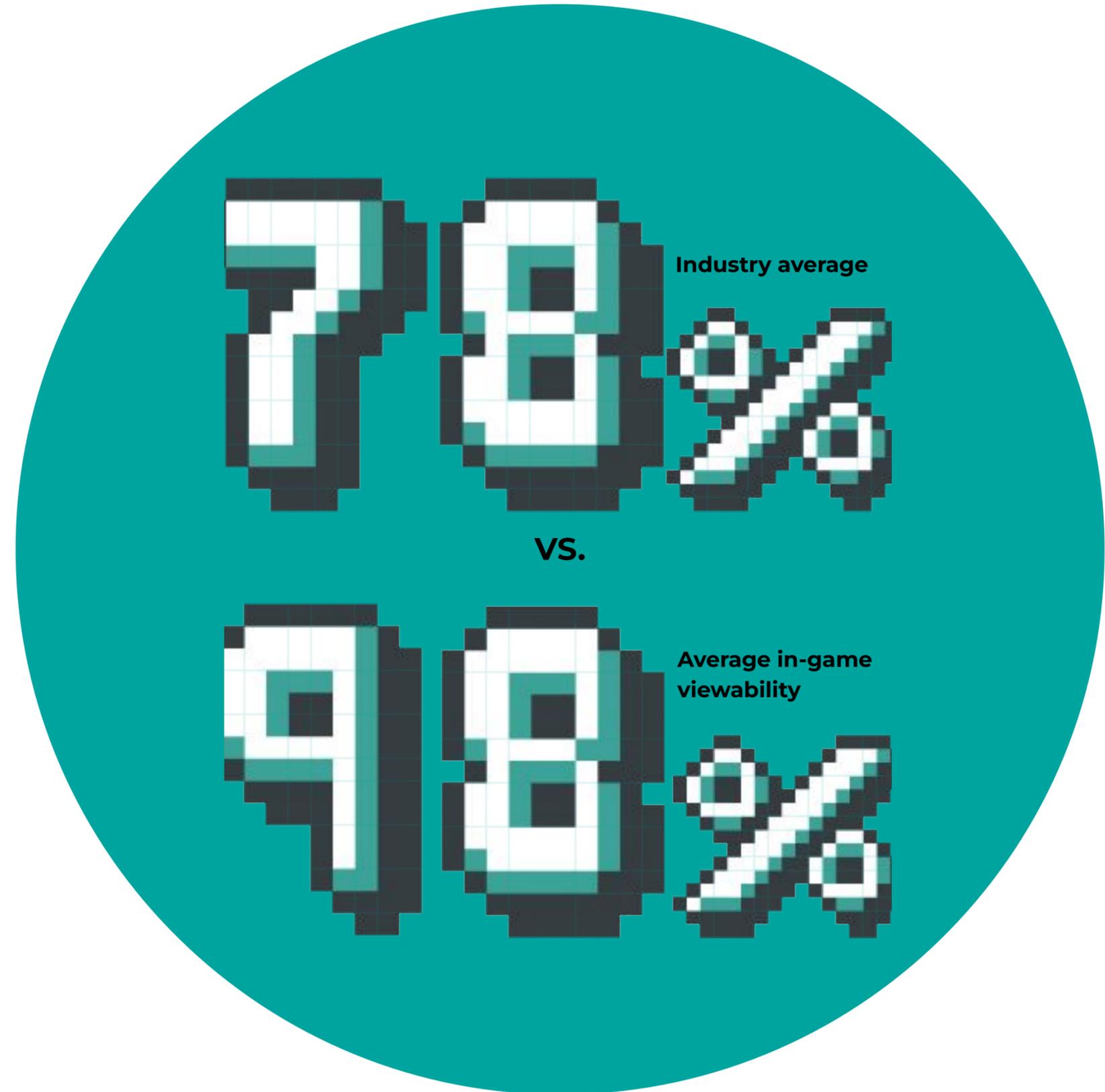
In-game advertising formats were compared against 42 digital advertising formats which are included in the Lumen database and used to inform our digital advertising norms.



Desktop Image	Desktop Video	Mobile Image	Mobile Video
Billboard 970x250	Billboard 970x250	DMPU 300x600	DMPU 300x600
DMPU 300x600	DMPU 300x600	Mobile Banner Large 320X90	Mobile Banner Large 320X90
Leaderboard 728x90	Leaderboard 728x90	Mobile Banner Small 320x50	Mobile Banner Small 320x50
Mobile Banner Large 320X90	Mobile Banner Small 320x50	MPU 300x250	MPU 300x250
Mobile Banner Small 320x50	MPU 300x250	Facebook Infeed	Facebook Infeed
MPU 300x250	Skyscraper 120x600	Instagram Infeed	Instagram Infeed
Skyscraper 120x600	Wide Skyscraper 160x600		Teads InRead
Teads InRead	Facebook Infeed		YouTube - Non-skippable 15
Wide Skyscraper 160x600	Teads InRead		YouTube - Non-skippable 20
Facebook Infeed	YouTube - Non-skippable 15		YouTube - Non-Skippable 6
	YouTube - Skippable <15		YouTube - Skippable <15
	YouTube - Skippable >30		YouTube - Skippable >30
	YouTube - Skippable 15-30		YouTube - Skippable 15-30

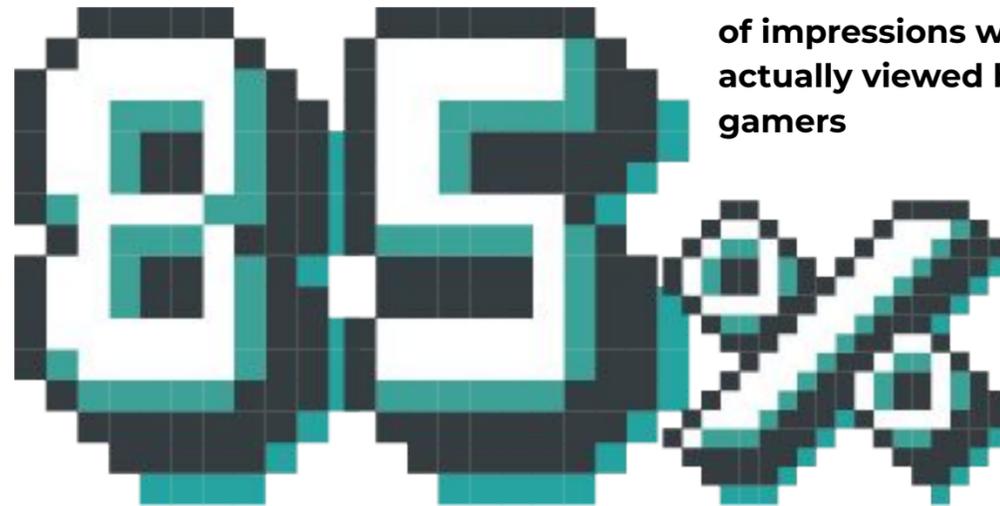
HOW DOES VIEWABILITY IN-GAME COMPARE TO OTHER DIGITAL ENVIRONMENTS?

Based on Lumen data, **the average viewability score across 42 digital advertising formats* is 78%**, with a number delivering below 50%. In contrast, **Anzu's in-game advertising benefits from 98% viewability¹**.



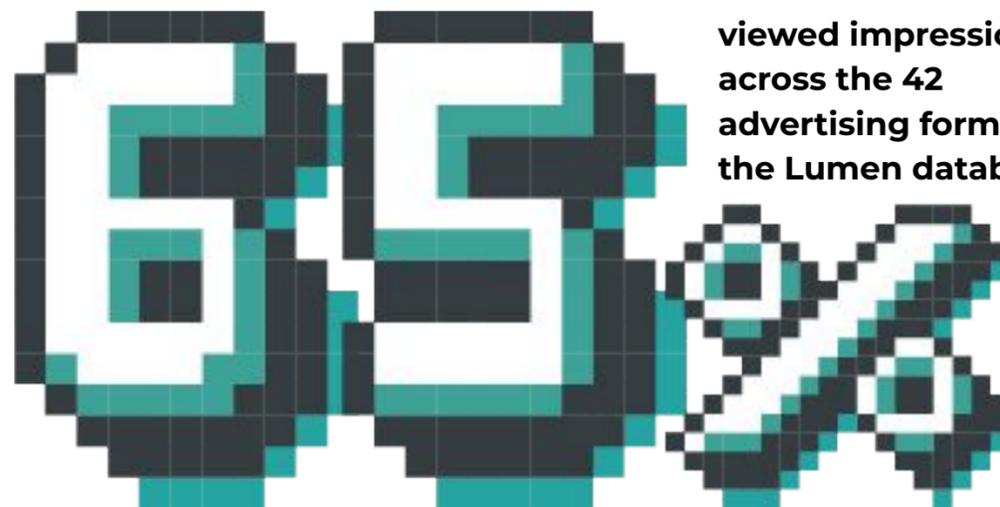
HOW MANY GAMERS ACTUALLY VIEW IN-GAME ADS?

Lumen's data shows **85% of impressions were actually viewed by gamers**. Anzu's data shows that its ads range from 67% to 94%, depending on the campaign, with desktop display advertising leading the way.

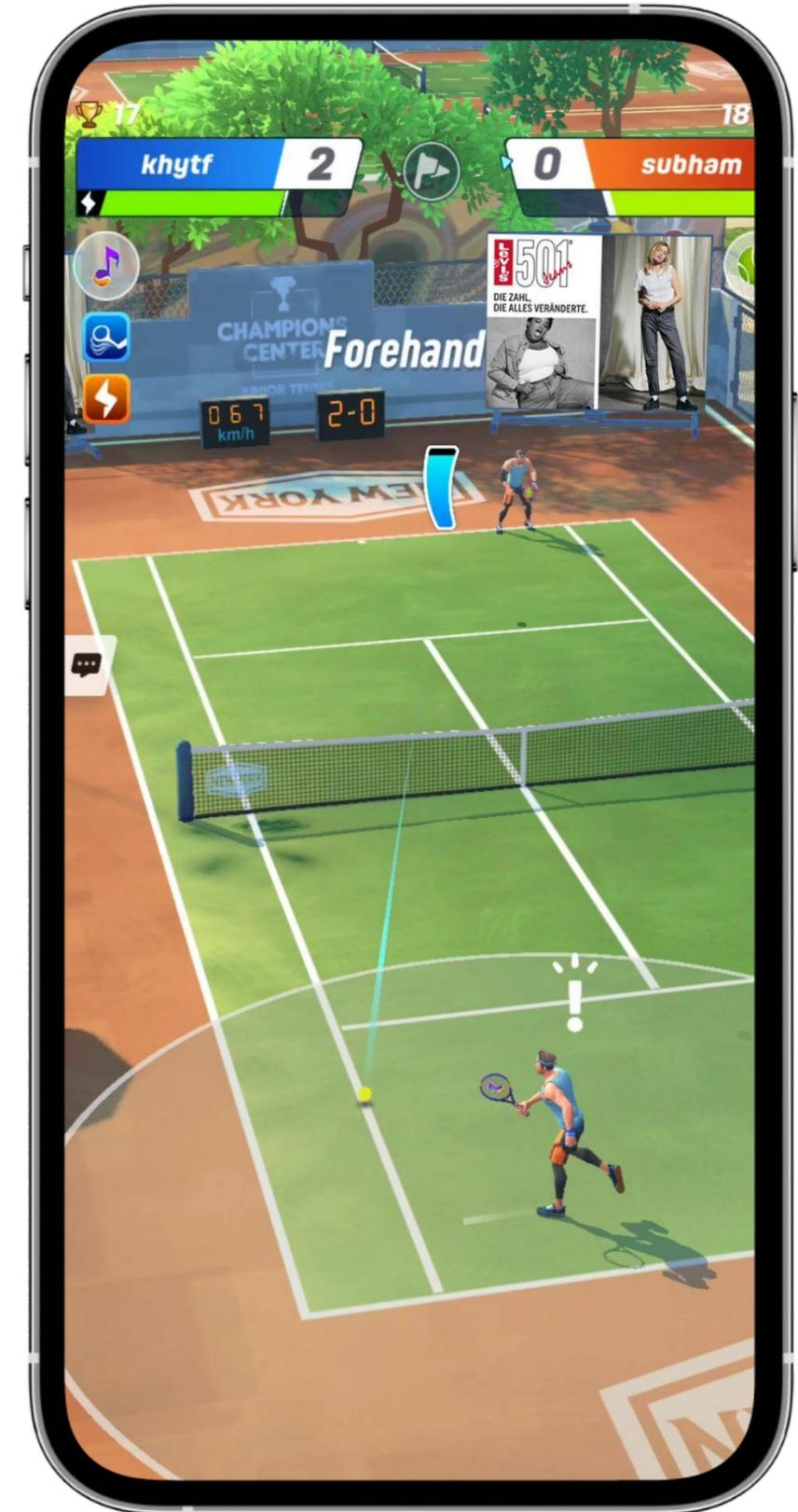


of impressions were actually viewed by gamers

VS.



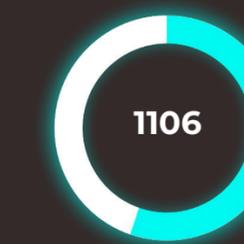
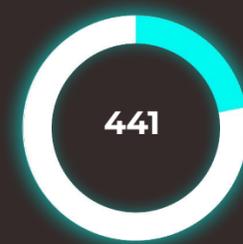
viewed impressions across the 42 advertising formats in the Lumen database



HOW DOES THAT COMPARE TO OTHER DIGITAL ADVERTISING FORMATS?

Lumen data shows that **the average viewing figure across 42 digital advertising formats* is 65%**, with a low of 21%.

- % viewability
- % viewed
- Time spent viewing
- Attention seconds / 1000



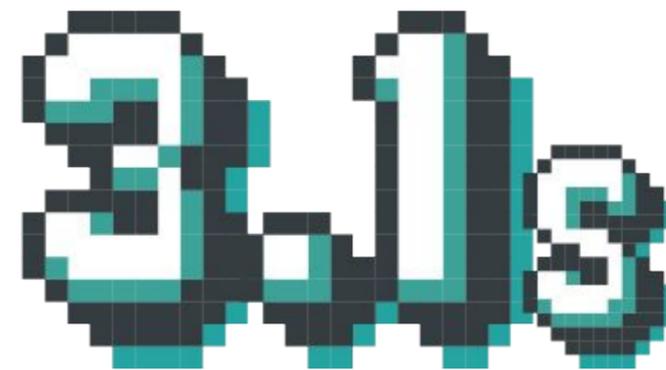
HOW LONG DO PLAYERS SPEND VIEWING IN-GAME ADS?



Lumen advises that 2 seconds of viewing is a critical threshold for ensuring that scarce attention is translated into accessible memory.

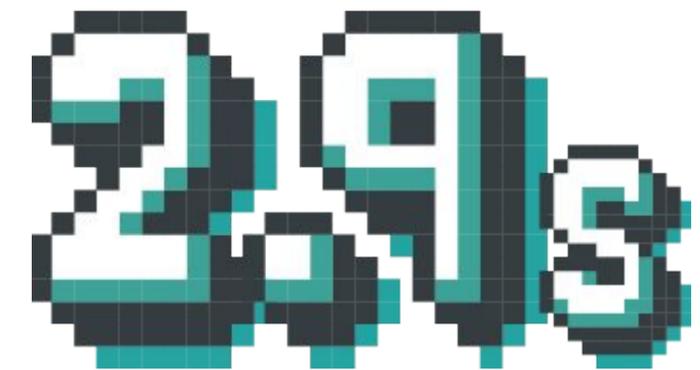
80% of the 25 ads studied from campaigns run by Anzu exceeded the 2-second threshold with an average of 3.1 seconds, with the best-performing ad viewed for an average of 7.8 seconds. **Lumen gaming data shows a generic norm of 2.5 seconds** spent viewing in-game advertising.

Lumen data also shows that across 42 digital advertising formats*, **the average time spent viewing ads is 2.9 seconds**, but only 43% of the digital advertising formats and 19% of non YouTube formats exceeded the 2-second threshold set by the industry.



Average in-game viewability

VS.



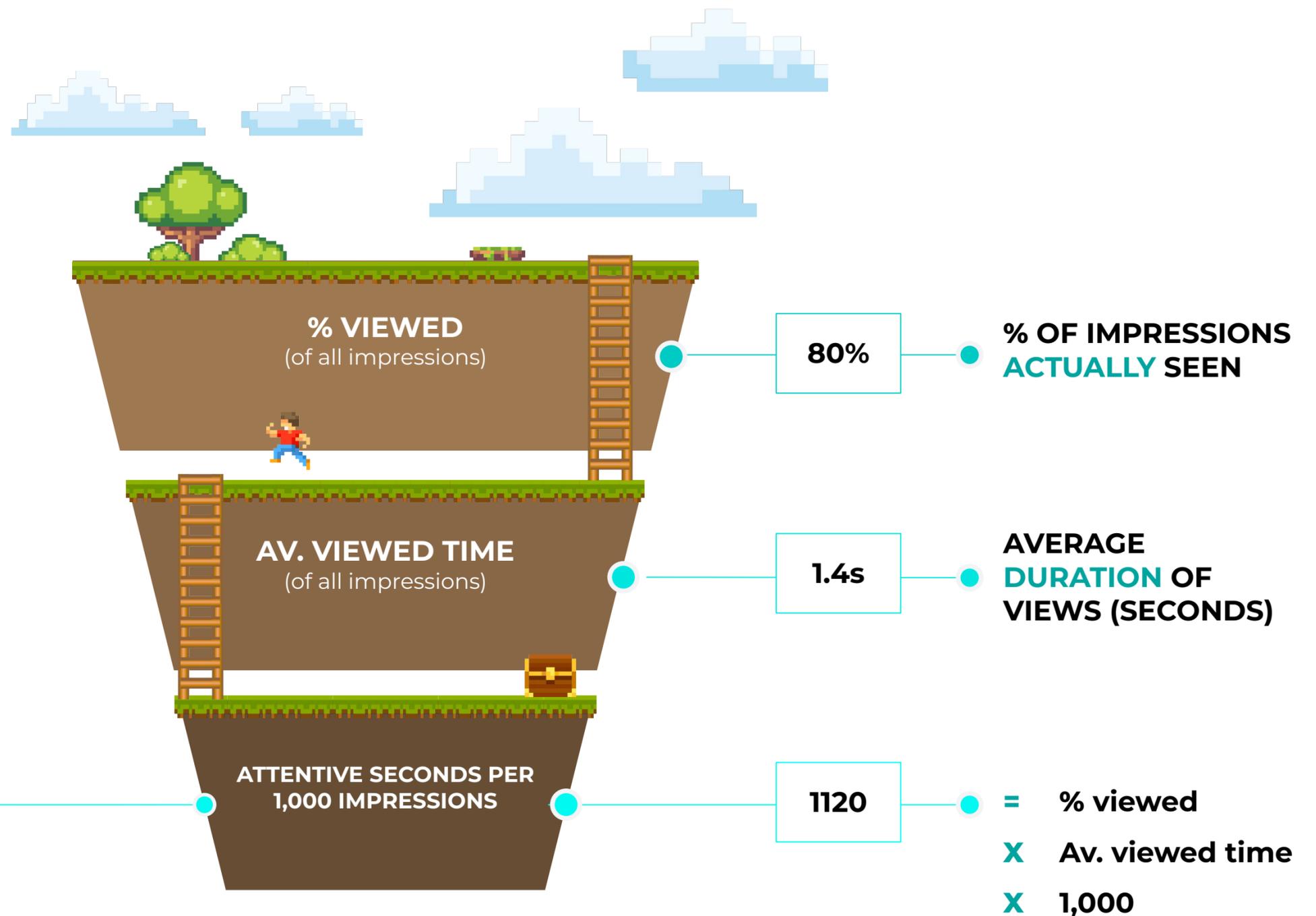
Industry average

UNDERSTANDING THE FORMULA

ATTENTIVE SECONDS PER 1,000 IMPRESSIONS

This composite metric helps us understand **the true power of advertising** to deliver 'eyeballs' for advertisers and can be used as a single metric to assess inventory quality across media channels.

If you are buying 1,000 impressions from someone, **this formula shows how many attentive seconds you can expect** off the back of it. Measuring in this way enables cross-channel comparisons.



HOW MUCH ATTENTION DOES GAMING DEMAND?

Lumen measured attentive seconds per 1,000 impressions for all 42 digital advertising formats*, which came to 2,291. In-game advertising came in just below this with an average of **2,113 attentive seconds**.

However, Anzu-specific studies have an average of **2,795 attentive seconds**, with the highest campaign achieving **6,981**.

The most important takeaway is that **in-game advertising drives more attention**, exceeding 69% of all other digital advertising formats.

Anzu's campaigns did an even better job driving attention, exceeding 76% of all other digital advertising formats.



2113

LUMEN GAMING AVERAGE
(all formats and types)



2291

DIGITAL ADVERTISING AVERAGE



2795

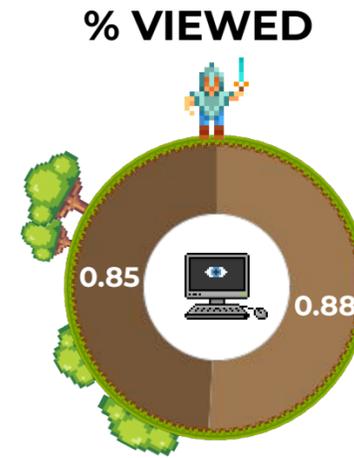
ANZU GAMING NORM

GAMING VS. SOCIAL MEDIA

When it comes to display advertising, **Anzu comes out ahead of the social networks**. This is driven by the time spent viewing Anzu's ads, enabled by the viewability of in-game advertising throughout the gameplay.

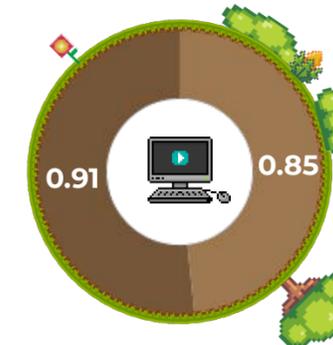
DESKTOP DISPLAY

- Facebook Infeed
- Anzu Norm



DESKTOP VIDEO

- Facebook Infeed
- Anzu Norm



MOBILE DISPLAY

- Facebook Infeed
- Anzu Norm
- Instagram Infeed

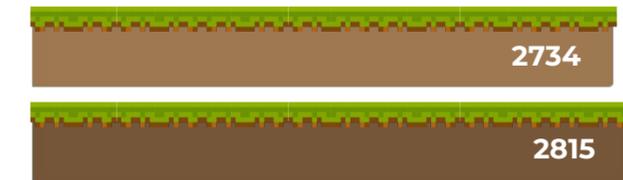
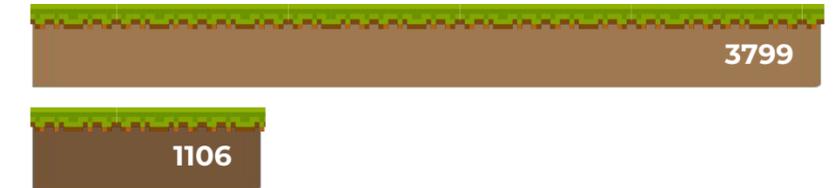


MOBILE VIDEO

- Facebook Infeed
- Anzu Norm
- Instagram Infeed

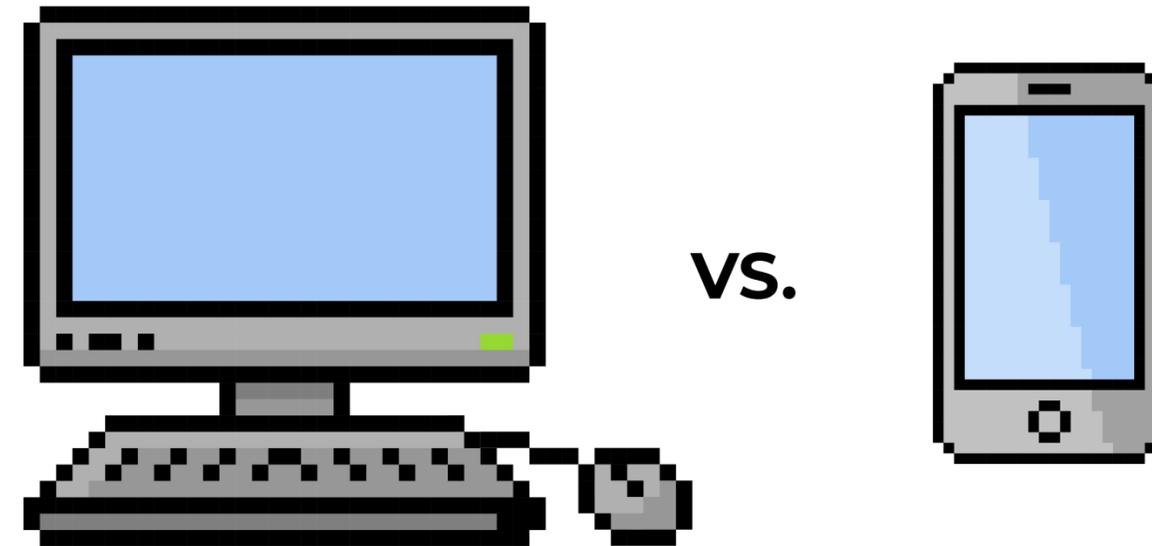


ATTENTIVE SECONDS (PER 1000)



DESKTOP VS. MOBILE

Lumen data shows that, on average, **mobile ad formats slightly outperform desktop**. In contrast, Anzu data shows that **in-game ad formats on desktop outperform mobile**. Such a large difference is driven by the share of the audience viewing the ad and the time spent viewing it.



FORMATS METRICS	LUMEN DESKTOP	ANZU DESKTOP	LUMEN MOBILE	ANZU MOBILE
VIEWABLE	75%	95%	81%	95%
VIEWED	59%	87%	70%	78%
AVERAGE VIEW TIME (SECONDS)	2.87	3.88	2.88	2.34
ATTENTION SECONDS PER 1000 IMPRESSIONS	2,270	3,553	2,316	1,973

DESKTOP VIDEO VS. DISPLAY

Desktop video dramatically outperforms desktop display, driven by the increased time spent viewing the advertising and specifically by the strength of YouTube advertising formats.

In contrast, Anzu desktop video advertising formats, on average, underperform relative to Anzu Desktop Display formats. This is driven by the difference in time spent viewing.

	FORMATS	LUMEN DESKTOP DISPLAY	ANZU DESKTOP DISPLAY	LUMEN DESKTOP VIDEO	ANZU DESKTOP VIDEO
METRICS					
VIEWABLE		70%	95%	79%	95%
VIEWED		52%	88%	65%	85%
AVERAGE VIEW TIME (SECONDS)		1.31	4.1	4.08	3.2
ATTENTION SECONDS PER 1000 IMPRESSIONS		737	3.799	3.449	2.734

MOBILE VIDEO VS. DISPLAY

Across all digital advertising formats, **the outperformance of video advertising is driven by the time spent viewing the advertising.**

The picture for mobile in-game advertising is more mixed and requires additional research. We see a marginal difference between in-game mobile display and mobile video, with **more people viewing in-game mobile display than mobile video** but spending longer viewing in-game mobile video than mobile display.

FORMATS \ METRICS	LUMEN MOBILE DISPLAY	ANZU MOBILE DISPLAY	LUMEN MOBILE VIDEO	ANZU MOBILE VIDEO
VIEWABLE	79%	95%	82%	95%
VIEWED	62%	79%	74%	75%
AVERAGE VIEW TIME (SECONDS)	1.32	2.3	3.6	2.6
ATTENTION SECONDS PER 1000 IMPRESSIONS	894	1,970	2,973	1,982

BRAND RECALL

Now we know advertising drives attention, it's important that we can show what impact this attention can have on a brand.

When we compare the test and control results for prompted brand awareness, we see a **9% point uplift between those exposed to in-game advertising and those not exposed** (74% vs. 65%), based on 12 brand studies).

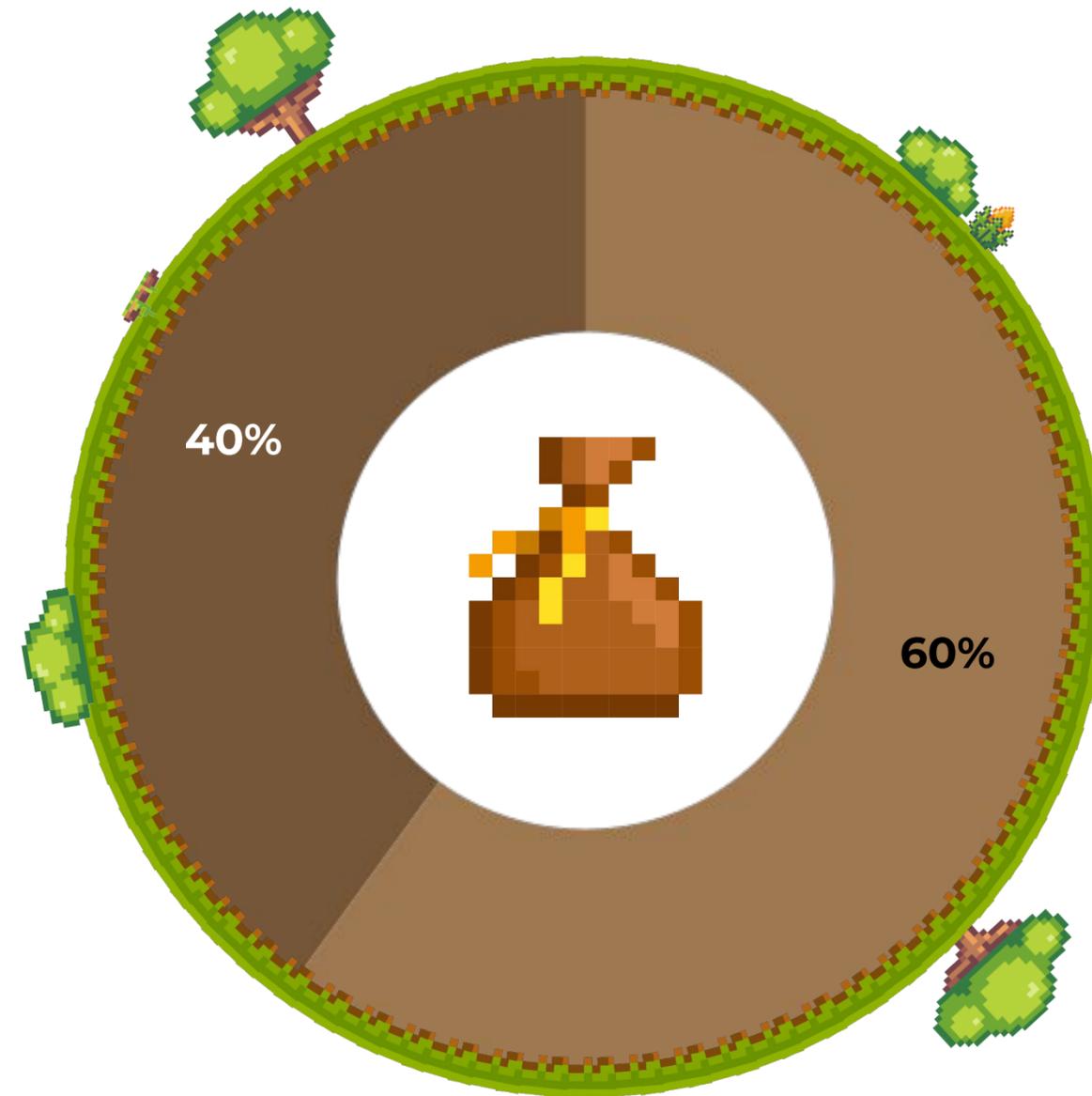
41% AVERAGE
SPONTANEOUS BRAND RECALL
WITH A HIGH OF 92%

49% AVERAGE
PROMPTED RECALL
WITH A HIGH OF 97%



PURCHASE INTENT

We asked all study participants how likely they are to consider buying the brand in the future to help us better understand **how attention impacts outcomes** and **how in-game advertising exposure influences gamers' intentions**.



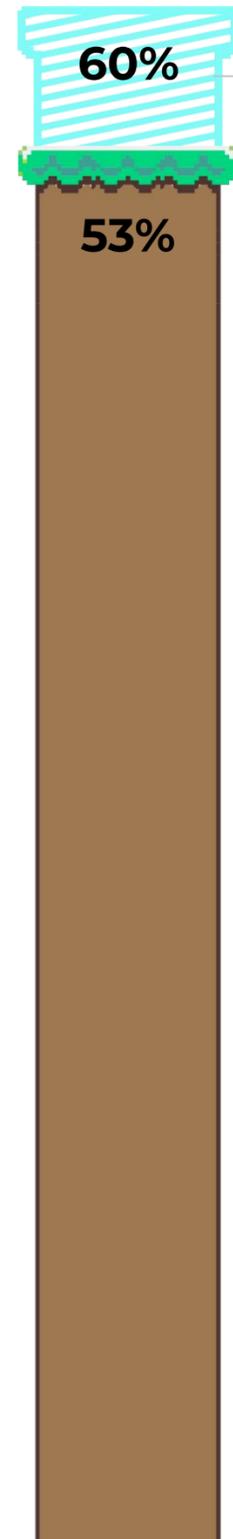
6 IN 10

gamers are likely to purchase the advertised brand in the future.

Based on the data from all of Anzu's intrinsic in-game ad campaigns.

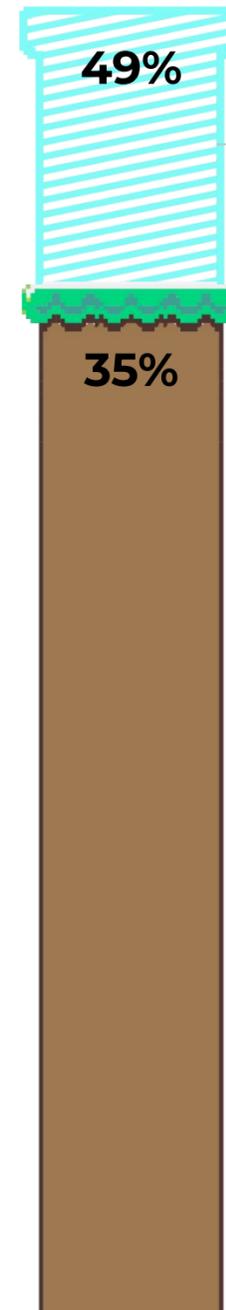
PURCHASE INTENT

When we compare the test results with the control audiences, we see a 7% point uplift, with **those exposed to the ads more likely to make a purchase**. The uplift in **purchase intent is especially significant for challenger brands**, with our top 10 campaigns seeing an **uplift of 14%**.



7%

points more likely to say they will make a purchase.



14%

average uplift from our top 10 campaigns from a control base of 35%

■ Control group
■ Uplift

WHAT HAVE WE LEARNED?

“People think of in-game media environments as fast-paced, but from an ad attention point of view, Anzu ads do well because they are ‘slow media’. The ads are on screen for longer, and close to the action, so difficult to ignore. It’s because players are so engaged with the game that they also engage with the ads: good for the players, and good for the brands”



Mike Follett

CEO, Lumen Research



Anzu’s in-game advertising drives 98% viewability¹ exceeding all other digital advertising formats — Lumen has a digital advertising norm of 78%.



Viewability translates into strong viewing figures — 85% (Lumen’s gaming industry norm) vs. 64% (Lumen’s digital advertising norm), putting in-game advertising in a leading position.



In-game advertising commands gamers’ attention for longer than any other digital advertising format other than YouTube, with **80% of Anzu’s campaigns exceeding the 2-second threshold** vs. 20% for standard digital formats.



When it comes to the Lumen attention formula, the **average Anzu score is 22% higher** than the average score across 42 digital advertising formats and is **higher than 76% of digital formats.**



Attention paid to in-game advertising translates into **strong brand recall (41% average spontaneous brand recall)** and purchase intent (**7% point sales uplift**), driving success through the funnel.

WHAT NEXT?

“Across entertainment formats, games represent one of the most immersive and engaging formats in the world. We see more brands and agencies embracing video game advertising to reach consumers in a highly personalized and connected way, which is expected to drive growth in video game advertising revenue of over 22% from 2022 to 2027.”



CJ Bangah

Principal, PwC

Anzu continues to grow its library of attention studies, providing granular guidance for advertisers on maximizing the effectiveness of the medium and individual formats.

We look forward to seeing innovations in attention research methodologies to capture the real gaming experience more directly, and working with more advertisers to develop our understanding of in-game advertising effectiveness and how we can optimize performance against your objectives.

The next step in this research will be using it to drive best practices around the creation of in-game ads to develop guidelines that advertisers can use to ensure they are getting the most out of their in-game campaigns.

We are also working hard to analyze the correlation between the ad's creative performance, the attention score, and brand uplift to better understand how we can continue to improve the performance of in-game advertising.



To find out more about Anzu's in-game advertising solution, [click here](#).

To measure attention for your next in-game campaign

GET IN TOUCH



www.anzu.io