

Dr. Karen Nelson-Field

ITV Showcase, Manchester | 18 June 2026





I am a Challenger Brand, Get Me Out of Here!

Escaping the dull media trap.

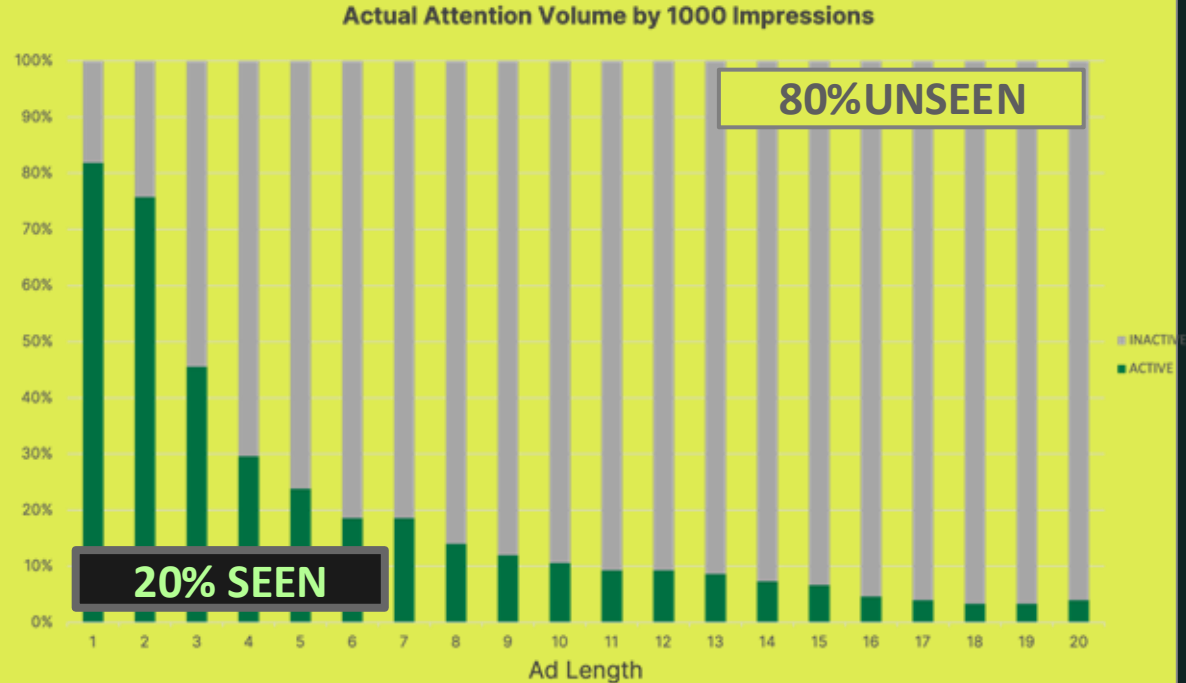
All brands compete in the

Media Jungle



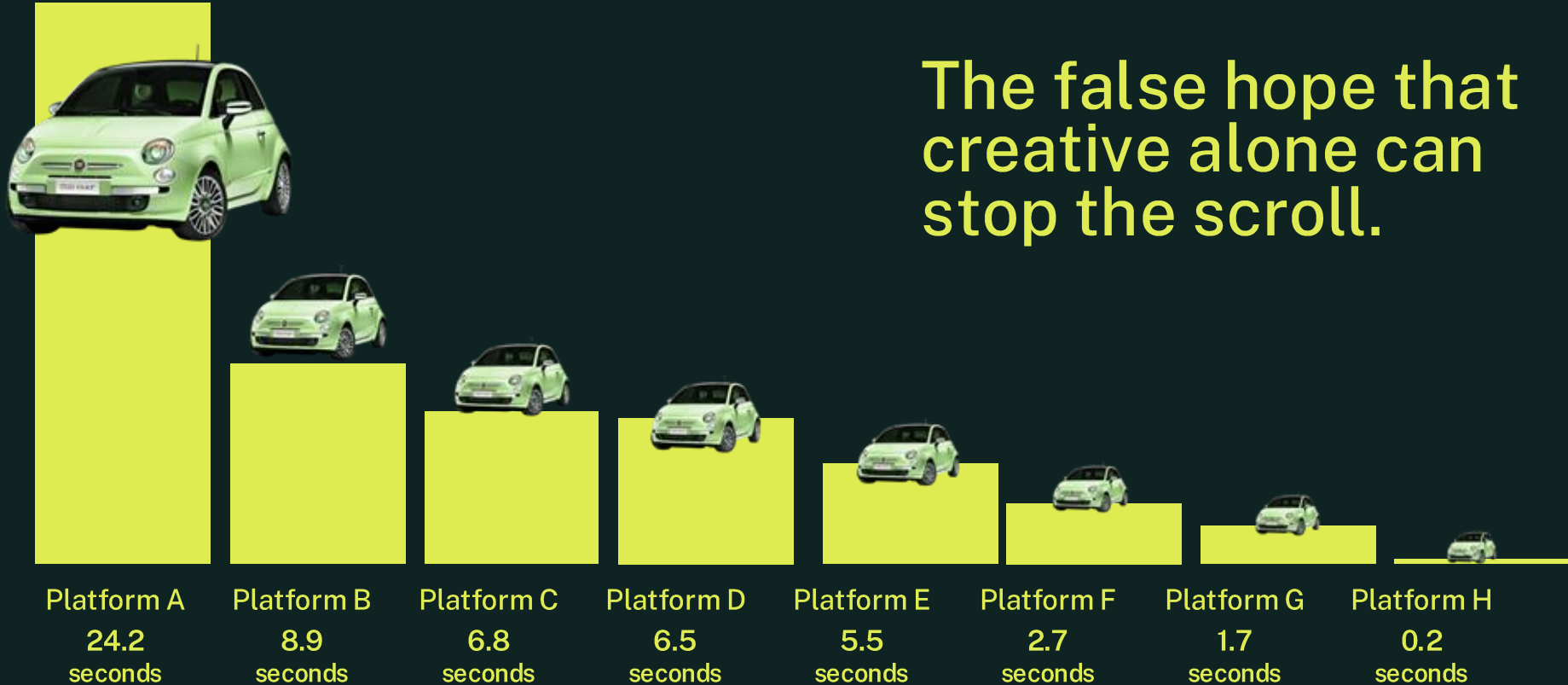
The game?

The ad spend
wasted the
gap between
served vs seen.



The game?

The false hope that
creative alone can
stop the scroll.



The game?

The continued
reliance on a
meaningless
currency.

CPM FORMULA

How to calculate cost per impression

CPM =

Cost per impression

Total amount spent

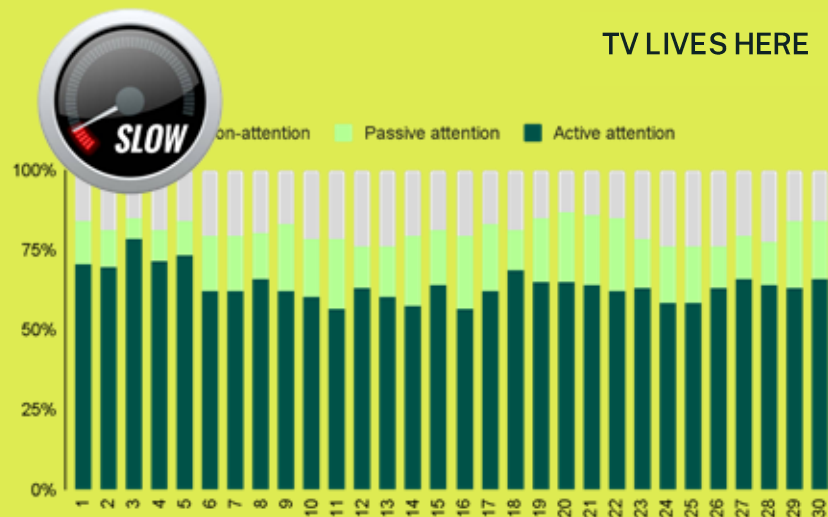
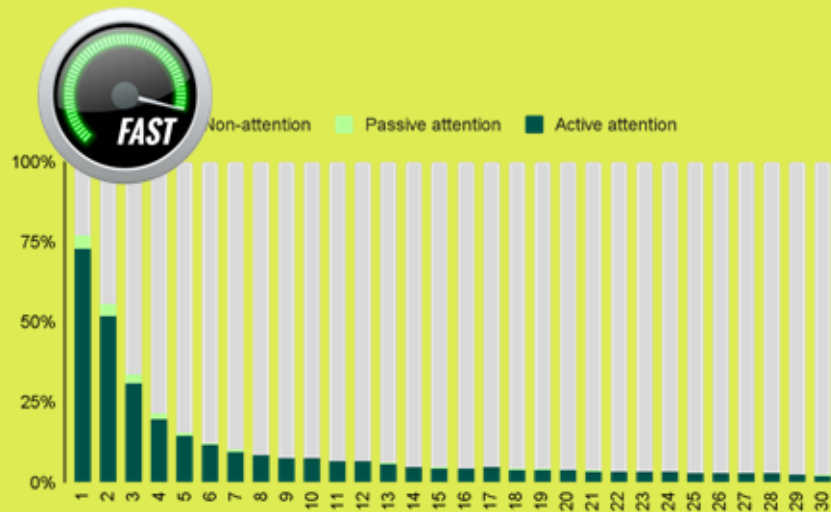
Total impressions

x 1,000

Snov.io

The jungle hides where attention disappears.

Yet across 13 countries, roughly 80% of spend lands in fast-decay environments.



Fast-decay formats deliver short bursts of attention and rapid disengagement.
Slow-decay formats deliver more sustained attention for longer, allowing memory to form.

Celebrities have a natural buffer.

Challengers Don't



But big brands can typically manage inattention better.
They have built up brand credibility.



Running Shoe A



Running Shoe B

Challenger Study 1

Cannes. The Eye Watering Cost of Dull Media.

The real cost of investing
in low attention advertising.

itv



Cost of
**Dull Media
Down Under**

Same rules. Different market

itv



Levels Of Dull

Four buckets of Reach and Time (how many people watched, and for how long).

Avg across 13 countries.

ATTENTION VOLUME

63%

19.6 sec

TV LIVES HERE

Non-DULL

36%

5.5 sec

Moderately DULL

25%

2.7 sec

Very DULL

6%

1.0 sec

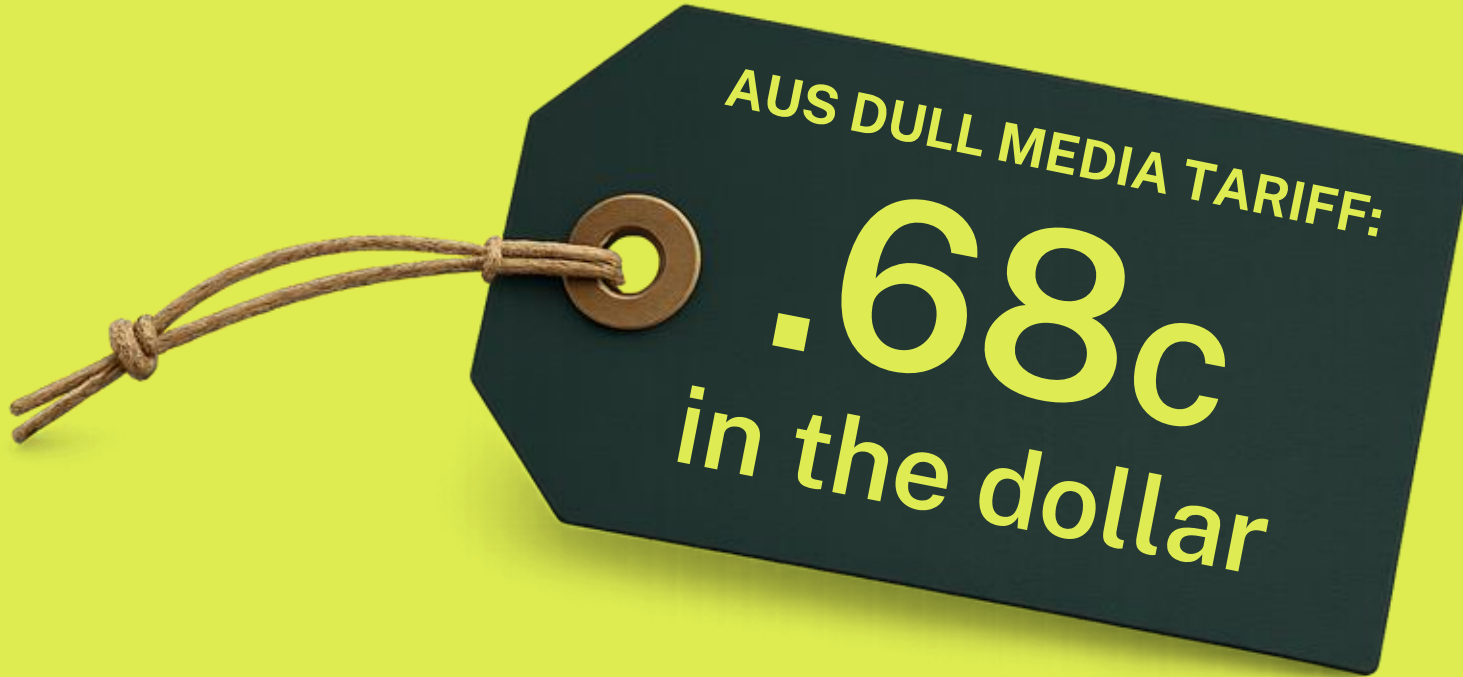
Extremely DULL

The Cost of Investing in In-attention



For every \$1 you put into dull placements, 43c evaporates (no attention, no STAS uplift, no return).

The Cost of Investing in In-attention



For every \$1 you put into dull placements, 68c evaporates (no attention, no STAS uplift, no return).

The Jungle

The jungle is harsh. Dull formats are not forgiving.

≈ **12x**

Lower active attention

≈ **50%**

Audience lost in first 3 seconds

-34%

Lower brand impact (STAS)

≈ **8x**

Lower efficiency per dollar

But challengers lose first.

GLOBAL STUDY

6x

Challenger brands take a 6₇ steeper performance drop than established brands as media gets duller.

AUSTRALIA STUDY

6x

Challenger brands take a 6₇ steeper performance drop than established brands as media gets duller.

Challenger Study 2

Brand memory fades with distance from buying. Recent buyers hold more memory than non-buyers. That's normal.



	Within the past year	Within the past 1-2 years	Within the past 2-5 years	Heard of, never flown
Country 1	10.2	9.6	6.7	5.5
Country 2	7.7	7.7	5.8	4.5
Country 3	6.7	5.5	5.1	3.1

The problem isn't the rate of decay.
The problem is where memory starts.
TV viewers start with higher brand
associations and stay higher.



	Within the past year	Within the past 1-2 years	Within the past 2-5 years	Heard of, never flown
Social-first	6.8	5.0	4.9	2.9
TV-first	8.8	10.3	7.4	4.6

TV lifts memory for everyone. The biggest gains are among non-buyers- the largest share of a challenger's audience.

BUYERS
TV First

7.9

Brand associations

BUYERS
Social First

6.6

Brand associations

TV First -Memory Uplift buyers

+20%

NON-BUYERS
TV First

5.6

Brand associations

NON-BUYERS
Social First

3.4

Brand associations

TV First -Memory Uplift non-buyers

+65%

The Only Way Out

When most of our budget goes to fast, decay formats, we have a problem.
But the solution is simple.



Appropriate % media that **Holds Attention**
Branding that **Sticks**
Creative that **Moves People**



The Public

Has Voted



**Dull media costs.
Attention pays.**



**And challenger brands don't
have to stay in the jungle.**



Learn about AttentionAI

LOOK BEYOND