



**CONSUMER ATTENTION IN DIGITAL:
WHY ATTENTION MATTERS MOST IN 2015**



DO I HAVE MY AUDIENCE'S ATTENTION?

In an ever smarter but also ever more cluttered digital landscape, this is the big question for digital advertisers. So how are brand marketers, agencies, and publishers thinking about attention today? We asked, and here's what we learned.

UNDERTONE VIEWPOINT: ATTENTION IS THE NEW METRIC

The average person sees thousands of brand messages per day, but the effectiveness of most is questionable. The key is attention: not just seeing an ad, but making the choice to engage with it. To achieve this, advertisers are making significant changes to their digital strategies. They're significantly shifting budgets from standard banners to mobile, video, and native, and customizing the experiences there in order to get consumers' attention. Advertisers have found that context matters: advertisers are increasingly valuing great creative and the right placements as the primary attention drivers, and it's not a one-size-fits-all experience for each device. Meanwhile, advertisers are also working with publishers to experiment with innovative technologies to extend these interactive, viewer-friendly experiences across devices.

The focus on attention is leading digital to shift from quick delivery metrics like impressions and CTR, towards metrics that show a brand fully had a user's attention. With budgets moving towards more interactive formats, new technologies being embraced for their interactive benefits, and success metrics focusing on interactions and post-impression actions, coupled with an emphasis on viewability, creative, and placements, it's all adding up: attention is becoming the digital metric that matters most in 2015 and beyond. These days, more and more digital advertisers are looking to deliver experiences rather than just impressions.

METHODOLOGY: The study was fielded online from March 5 – April 1, 2015. The sample included marketers, agency members, and publishers representing leading U.S. advertisers and media properties from a diverse array of industries.

760 RESPONDED: 571 agency/trading desk members, 101 marketers, and 88 publisher contacts. Respondent incentives included gift cards, charitable donations, and a first look at the results.

TOP TAKEAWAYS

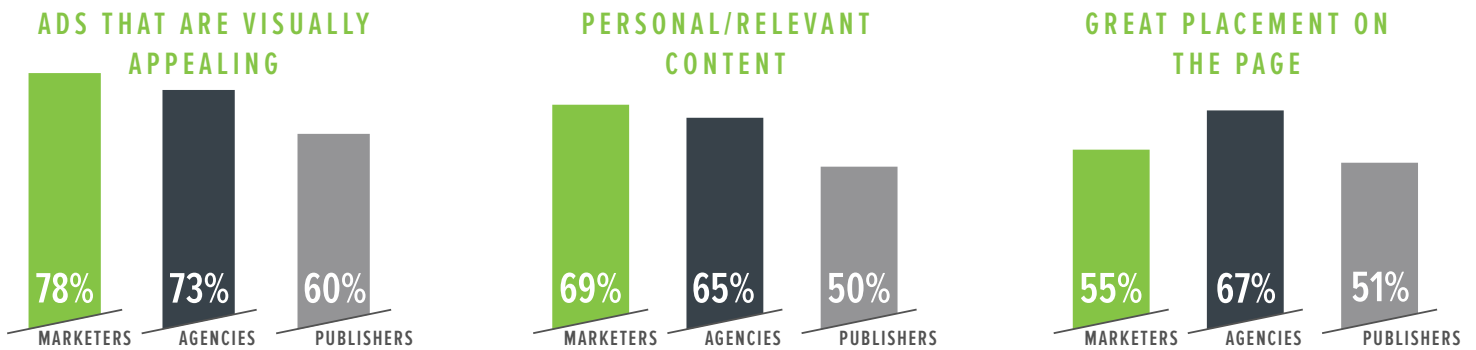
THE FOCUS ON ATTENTION MEANS:

- 1 Budgets are shifting to mobile, video, and in-feed formats at the expense of banners.
- 2 Success metrics are moving to focus on indicators that attention was paid, such as interactions and post-impression actions.
- 3 Both advertisers and publishers need to take responsibility for viewability, which is a first step to gain attention.

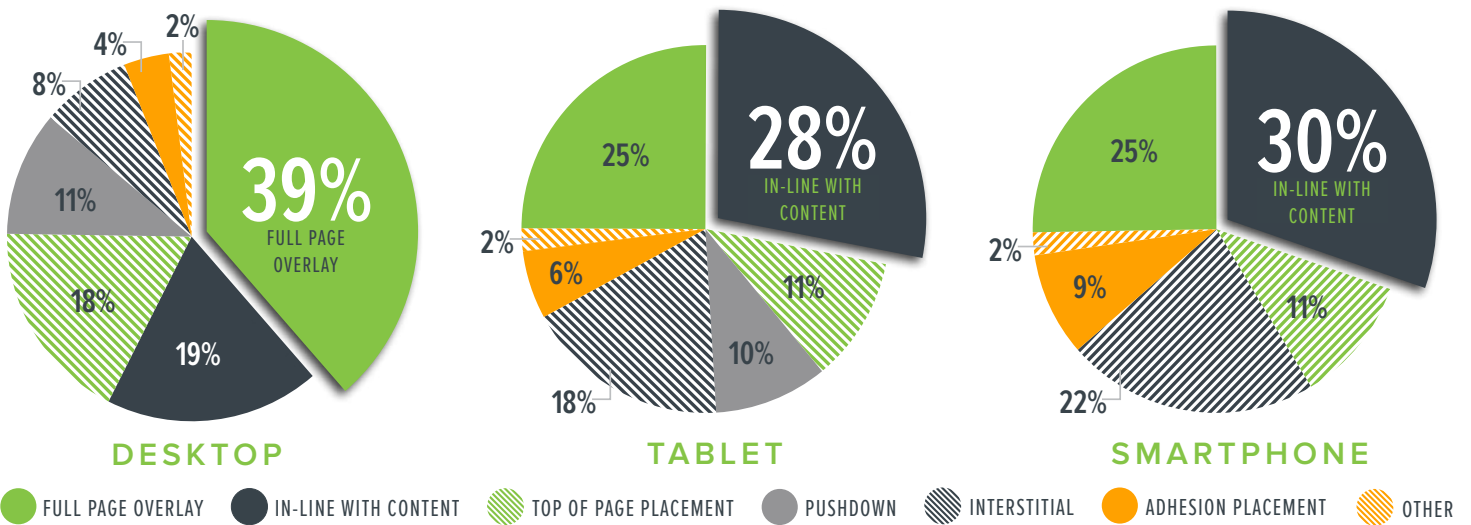
CREATIVE IS KEY TO ATTENTION, BUT THE INDUSTRY BELIEVES IDEAL PLACEMENT VARIES ACROSS SCREENS.

Native ads (in-line with content) have come onto the scene in a major way: they're seen as the top placement choice for mobile devices and the second choice for desktops. On mobile devices, consumers focus all their attention onto a considerably smaller, scrolling canvas that's taken over by content, so in-line ads become a can't-miss format. The focus on content has led to the growth of in-line ads, and we're sure to see more and more ad formats that take advantage of content—because that's where the attention is.

TO GARNER CONSUMER ATTENTION (ADVERTISERS) AND CREATE A POSITIVE USER EXPERIENCE (PUBLISHERS), EVERYONE AGREES THAT THE TOP 3 CONSIDERATIONS ARE:



FOR ADVERTISERS, THE BEST AD PLACEMENT TO CAPTURE ATTENTION VARIES BY SCREEN:



AND FOR PUBLISHERS, PLACEMENTS IN-LINE WITH CONTENT ARE THE TOP CHOICE FOR MINIMIZING ANY POTENTIAL ADVERSE EFFECTS OF ADS ON THE USER EXPERIENCE, ACROSS ALL SCREENS.

“EXPERIENCE IS KING. THE UNIT ITSELF WON'T MATTER LONG TERM IF ADVERTISERS ARE NOT DRAWING USERS IN WITH BENEFICIAL EXPERIENCE.”
—AGENCY RESPONDENT

DIGITAL'S SMALL SCREENS ARE A BIG DEAL.

It's clear that mobile devices have consumers' attention: on average, people check their phones more than 150 times per day. Accordingly, nearly all buyers and sellers have incorporated mobile into their digital advertising, and more importantly, the marketplace is recognizing that mobile ads shouldn't be just shrunken desktop ads. To grab attention on mobile, advertisers must take into account the context of how mobile devices are used and consumers' relationships with these smaller, more personal screens to most effectively capture their attention.

MOBILE IS A PART OF (ALMOST) EVERYONE'S DIGITAL PLAN...

81%

OF MARKETERS

ARE RUNNING MOBILE CAMPAIGNS

93%

OF AGENCIES



OF PUBLISHERS
HAVE A MOBILE
SITE OR APP

...AND IT REQUIRES A UNIQUE STRATEGY.

94%

ADVERTISERS

96%

PUBLISHERS

AGREE THAT IT'S
IMPORTANT FOR MOBILE
CREATIVE TO BE OPTIMIZED
FOR THE SMALLER, MORE
PERSONAL MOBILE CANVAS

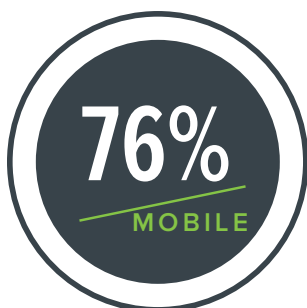
"[TO CAPTURE CONSUMER ATTENTION ON MOBILE,] UNDERSTAND WHY THE PHONE IS BEING USED AND WHY WOULD AN AD EVEN MAKE SENSE? THINK OF IT IN TERMS OF LEAN-BACK VS. LEAN-FORWARD EXPERIENCE."
—AGENCY RESPONDENT



BUDGETS ARE SHIFTING & SUCCESS METRICS ARE EVOLVING: MOBILE, VIDEO, NATIVE ARE IN, BANNERS AND CTR ARE OUT.

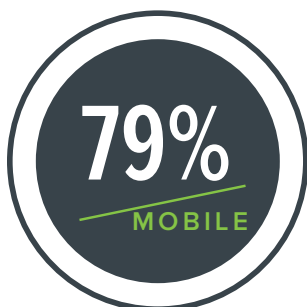
As consumers' attention shifts to new platforms and formats, dollars are following. Mobile, video, and native are winning, at banners' expense. Banners serve a purpose, but they're no longer at the core of digital strategy; they reinforce messaging, but aren't the best way to initially capture attention. When asked why budgets have changed, **54% OF ADVERTISERS** said they shifted in hopes of achieving better performance metrics. Which metrics? **74% OF ADVERTISERS** said that interactions and post-impression actions make them feel most confident that their ads have captured attention. By contrast, only **7% CITED CTR** as the factor that made them most confident in attention.

ADVERTISERS IN 2015 (COMPARED TO 2014) INCREASED THEIR BUDGETS FOR:



35% OF ADVERTISERS DECREASED THEIR STANDARD DISPLAY BUDGETS

PUBLISHERS REPORT SIMILAR INCREASES IN DEMAND FOR 2015:



35% OF PUBLISHERS SAW A DECREASE IN DEMAND FOR STANDARD DISPLAY

ADVERTISERS FEEL MOST CONFIDENT THEIR ADS HAVE CAPTURED VIEWERS' ATTENTION WHEN:

- The ad drives post-impression actions (webpage visits, conversions): **43%**
- The ad results in interaction (user engaged with features within the ad): **32%**
- The ad was clicked: **7%**

76% OF ADVERTISERS ARE INTERESTED IN BUYING DIGITAL MEDIA ON A COST PER INTERACTION BASIS.

"I THINK CONSUMERS NOTICE [STANDARD DISPLAY ADS] LESS BECAUSE THEY'VE GOTTEN USED TO THEM. THE CHALLENGE IS TO CREATE ENGAGING ADS."

—MARKETER RESPONDENT

"[WE HAVE] REFINED [OUR] APPROACH TO MEDIA. [CAMPAIGNS ARE] NO LONGER DRIVEN BY MERE MESSAGING, [THEY ARE] DRIVEN BY EXPERIENCES."

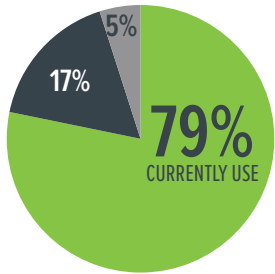
—AGENCY RESPONDENT

WEB TECH'S ADVANCEMENT IS EXCITING, BUT BUYERS ARE CAUTIOUS.

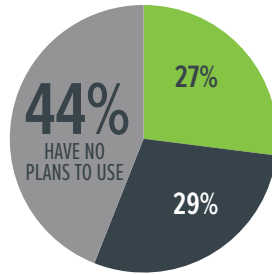
Advertisers are excited about innovative webpages and ad formats, but they're also cautious as these new placements come with unproven performance and increased pressure from clients. It's telling that both advertisers and publishers are looking at these new techniques with a view to improvements (more creativity in messaging, viewability, better user experience, innovative formats) that are geared toward gaining attention. Responsive design has by now gained a firm footing; infinite scroll is much newer, but already seeing significant adoption which we expect to grow.

WHAT ARE THE TRENDING TECH ADVANCEMENTS? RESPONSIVE DESIGN AND INFINITE SCROLL.

RESPONSIVE DESIGN PUBLISHERS



INFINITE SCROLL PUBLISHERS



- CURRENTLY USE
- PLAN TO IN THE NEXT 12 MONTHS
- HAVE NO PLANS TO USE

IMPLICATIONS OF EVOLVING WEB DESIGN, SUCH AS INFINITE SCROLL AND RESPONSIVE DESIGN, ON ADVERTISERS' DIGITAL STRATEGY:



IMPLICATIONS OF EVOLVING WEB DESIGN, SUCH AS INFINITE SCROLL AND RESPONSIVE DESIGN, ON PUBLISHERS' MEDIA SELLING STRATEGY:



VIEWABILITY ≠ ATTENTION AND IT'S EVERYONE'S RESPONSIBILITY.

Publishers feel the market's fixation on viewability is imbalanced and misguided, and it looks like they may be right: the great majority is mandating viewability, but less than half of marketers even understand what it means, and very few on the buy-side are confident that viewability means attention has been captured. So while viewability is a key stepping stone to attention, it's not a solution in itself. Viewability gives advertisers the opportunity to capture attention, but the right creative, format, and placement are needed in order to take advantage of that opportunity.

ARE YOU FAMILIAR WITH THE IAB GUIDANCE ON CAMPAIGN VIEWABILITY THRESHOLDS?



48%
MARKETERS

80%
PUBLISHERS

69%
AGENCIES

86%

ADVERTISERS WHO WILL MANDATE A VIEWABILITY THRESHOLD FOR THEIR BUYS IN 2015

9%

ADVERTISERS WHO SAY VIEWABILITY IS THE TOP FACTOR IN MAKING THEM CONFIDENT THEY HAVE CAPTURED ATTENTION

“VIEWABILITY DEPENDS IN PART ON THE QUALITY AND WEIGHT OF CLIENT’S ADS, SO THESE NEW STANDARDS HOLD PUBLISHERS ACCOUNTABLE FOR FACTORS THAT WE CAN’T ALWAYS CONTROL.”
—PUBLISHER RESPONDENT

“I THINK THAT VIEWABILITY SHOULD BE POSITIONED AS AN EQUAL ISSUE FOR BUY-SIDE AD TECH AS PUBS.”
—PUBLISHER RESPONDENT