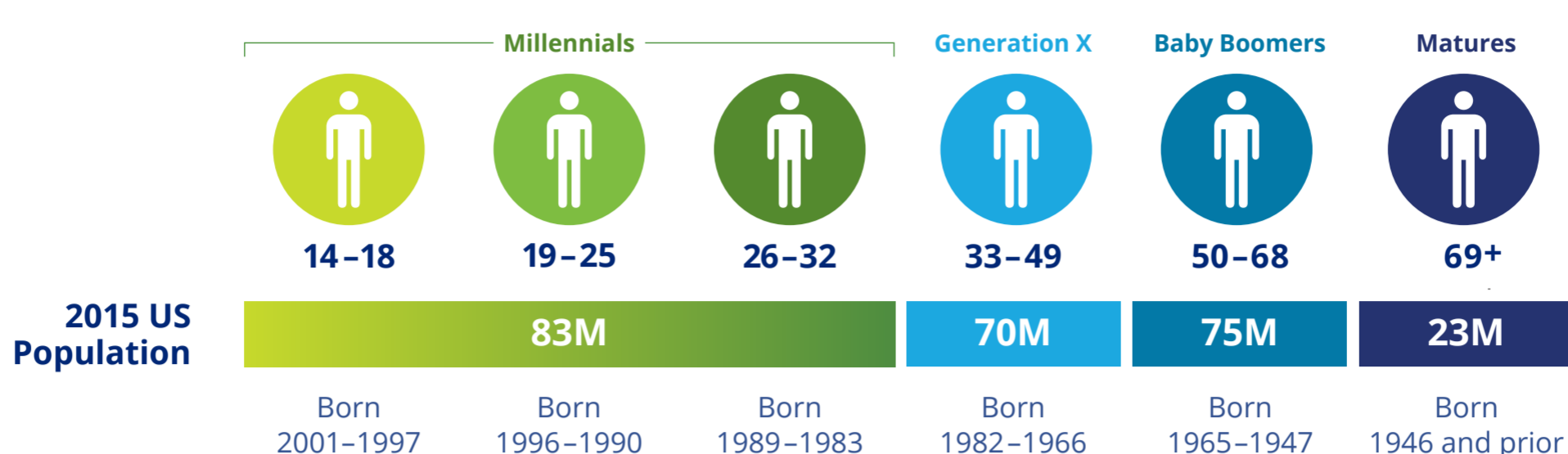


THE DIGITAL ADVERTISING EVOLUTION

Overcoming challenges to build cross-generational success

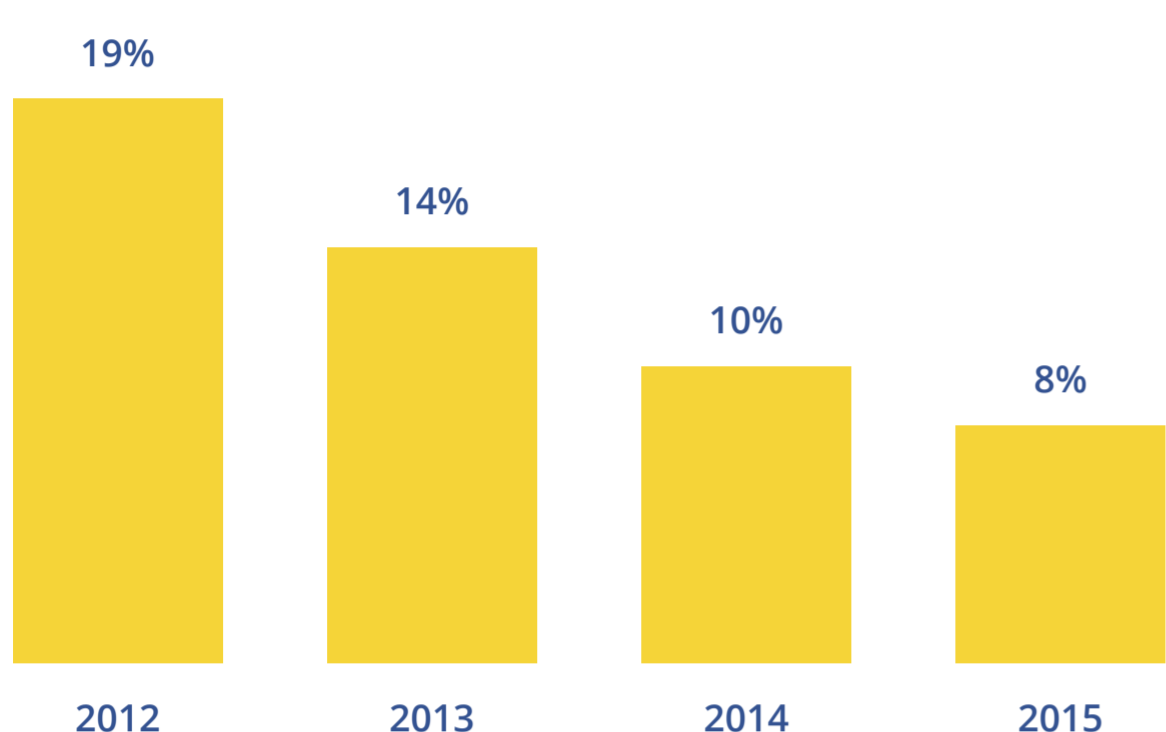


Capturing consumer attention in advertising is becoming more difficult. More consumers are multitasking during TV and streaming video, and ad blockers and bots limit reach and skew data. Dig deeper into our survey to see how these digital advertising challenges represent new opportunities.



RETHINKING DIGITAL ADVERTISING

The percentage of consumers who just watch TV (without multitasking) has steadily declined across all generations.



In addition to watching less live TV, consumers multitask more during TV ads than online ads.



Nearly **60%** of US consumers, and **75%** of millennials, are watching TV and movie content via streaming on a monthly basis.

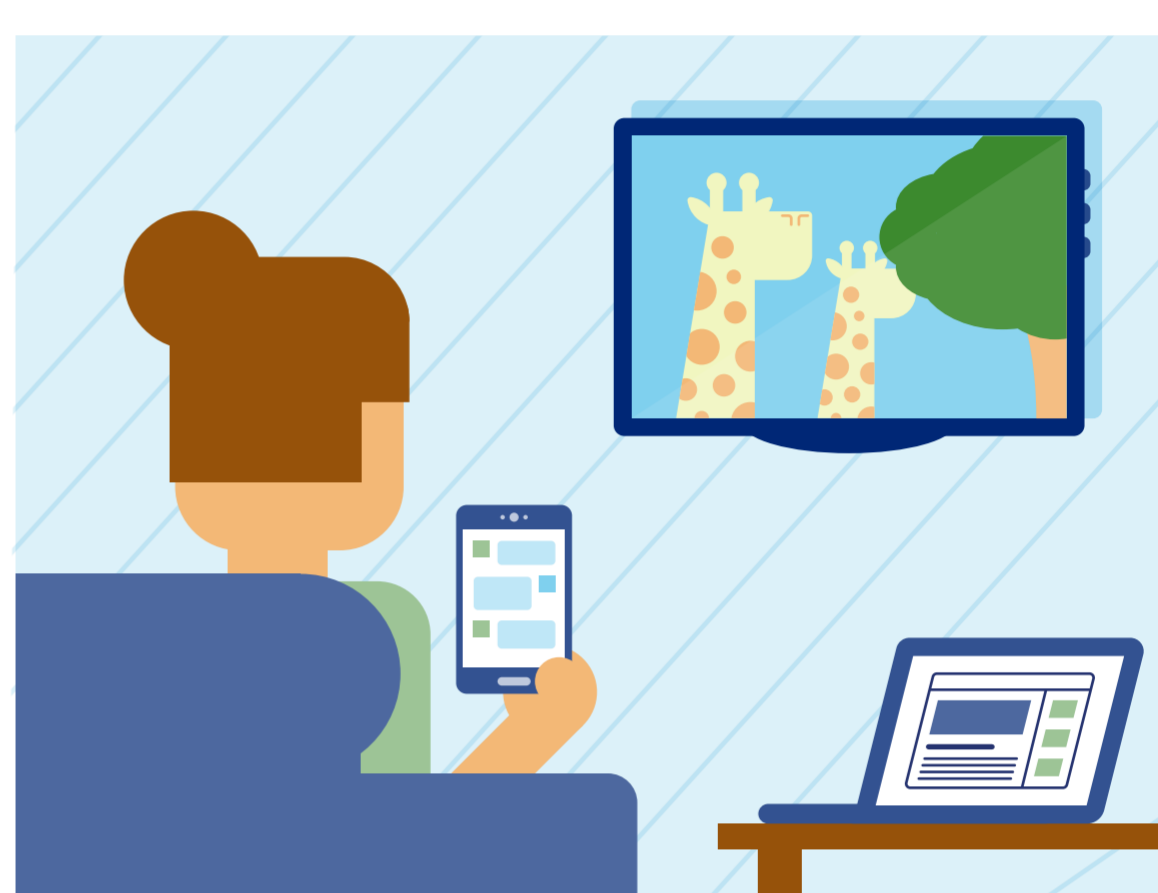


69% of US consumers say they multitask on another device or activity more while watching television ads than digital (online) ads. **75%** of Millennials say they multitask.

Consumer attention has increasingly spread across more mediums, and the time to capture their attention has decreased.



On average, millennials are doing **4 additional activities** while watching TV.

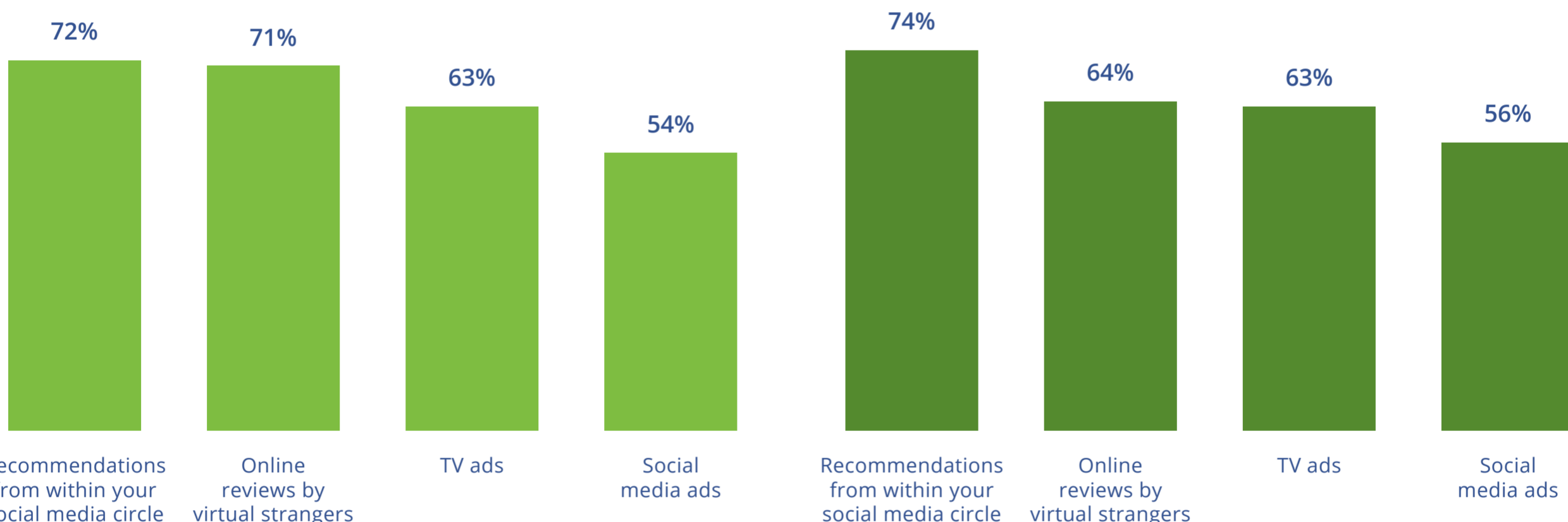


Web browsing, social media, texting, and email are the most popular activities among US consumers.

Social media is also changing the field on what influences buying decisions. Social media recommendations and online reviews now have more influence on buying decisions than television ads for millennials ages 19-32.

19-25

26-32



ADVERTISING ADVERSARIES

Ad-blockers

Ad-blocking software is becoming more prevalent in the US, increasing advertisers' difficulty in reaching consumers.



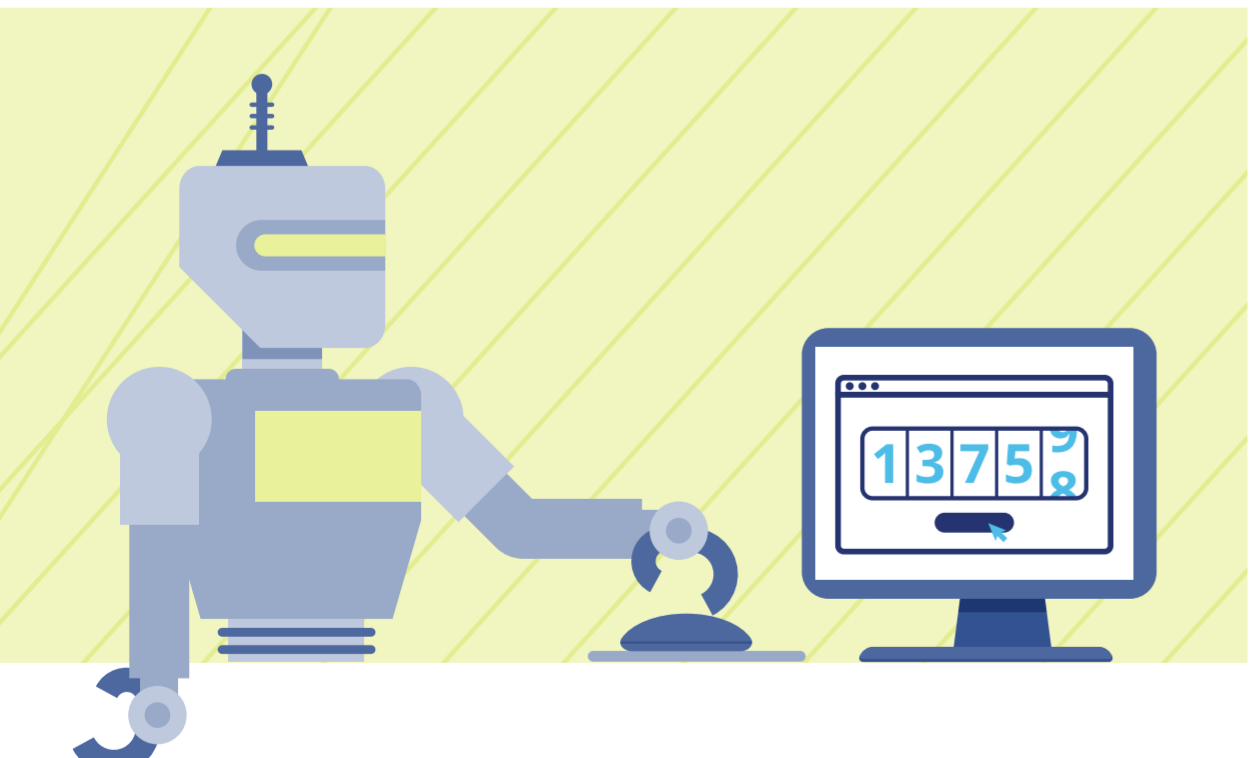
27% of US consumers use ad-blocking software.

40% of millennials ages 19-25 use ad-blocking software.



Nearly **200 million** people use ad-blockers worldwide.

- Ad-blocking grew **41%** globally and **48%** in the US in 2015.
- \$10.7 billion** in US ad revenue was blocked in 2015.
- \$21.4 billion** more is expected to be blocked this year.



Acknowledging fraud

Bots have also complicated the digital advertising space. They can falsely add value to otherwise poor-performing ads, costing advertisers big.



\$7.2 billion: Estimated global loss from bots this year.

Advertisers need to hold partners and third parties more accountable in the data and metrics they are using. Be prepared to understand trends in the digital realm to plan more strategically for success.

UNDERSTANDING ADVERTISING CHANGES

Without digital advertising savvy, companies risk losing money on ineffective ads. By developing a risk-based approach, organizations can stay ahead of trends to capitalize on the dynamic digital advertising ecosystem.

Source:
 "The Cost of Ad Blocking," 2015, PageFaire and Adobe
 "Bot Baseline: Fraud in Digital Advertising," 2015, Association and National Advertisers (ANA) and White Ops, Inc.
 "Digital Democracy Survey: Tenth Edition," 2016, Deloitte

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