



## **AGGREGATE EYEBALLS**

### **How To Attract, Engage, and Monetize Audiences Online**

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# Overview of Online Media Landscape

- Overall strategy
- Key trends
- Increased user control
- Fragmentation of media consumption
- Shift online



## Framework Overview

- Overview of the online landscape
- How to drive quality, targeted eyeballs at the lowest possible course
- Keeping eyeballs glued to your site
- Squeezing as much revenue out of those eyeballs as you can

- Advertising model (Google, portals, newspapers)
- Subscription model (Wall Street Journal Online, application service providers – Salesforce.com)
- E-Commerce model – buying and selling stuff
- Affiliate model – selling other people’s stuff
- Lead Generation model – finding targets to pitch stuff to



## Increased User Control

- Technology is enabling users to consume their media whenever (time-shifting) and wherever (multi-platform) they want
- User-Generated Content (UGC) – they not only want to consume but create content



## Breadth of Consumer Control

- Type of content they want to consume
- Which ads they want to consume
- Place and time that content is delivered
- Influence the development of brands through user-generated commentary



# Fragmentation of Media Consumption

1960s

- Newspapers
- Magazines
- Broadcast TV
- Radio
- Eight Track Tapes

1980s

Plus...

- Cassette Tapes
- Walkman
- Cable TV
- Personal Computer
- Console Video Games
- PC Video Games



## Media Channel Explosion

2000s

And then even more...

Email

MP3 players

Text messaging

CD player

Tivo/DVR

Instant messaging

Satellite TV

Slingbox

Download movies

Satellite radio

iPod

Podcasts

Internet

Blogs

Social networks

Cell phone

Online Video

Mobile games

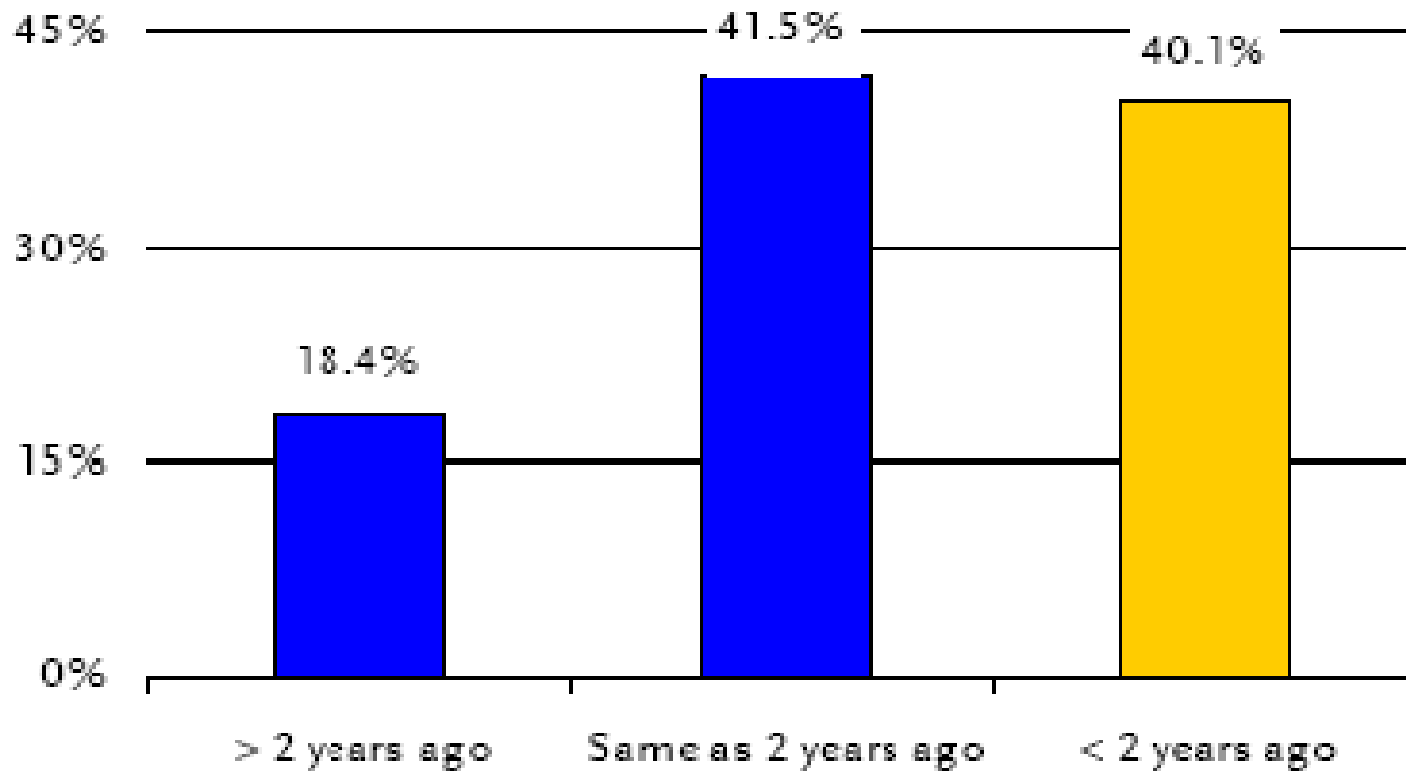
DVD player

Mobile Internet

Digital signage

## CONSUMERS WATCHING LESS TV THAN TWO YEARS AGO

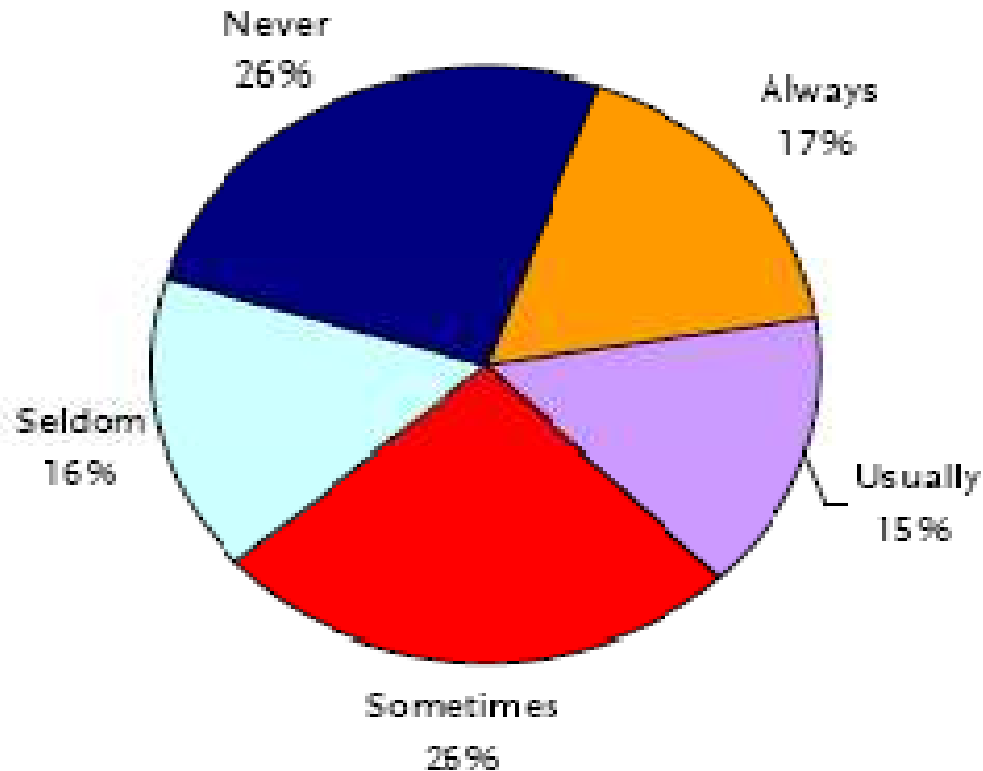
Do you watch more/less/same TV than two years ago?



# Multi-tasking More, Less Focused Attention

## CONSUMERS LIKELY TO SURF THE INTERNET WHILE WATCHING TV

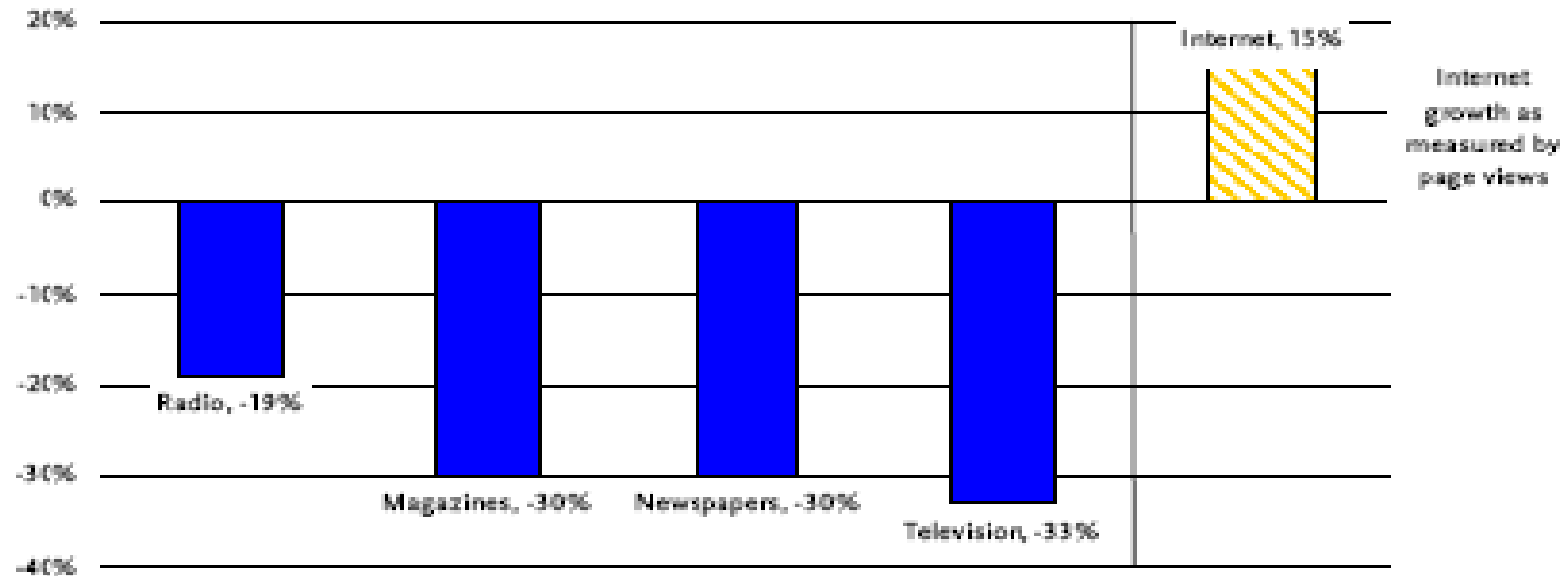
How often do you surf the Internet at the same time as watching TV?



# Consumers Shift Online

## CONSUMERS SPENDING LESS TIME WITH TRADITIONAL MEDIA

9% Spending Less Time With Medium Due To Time Spent Online

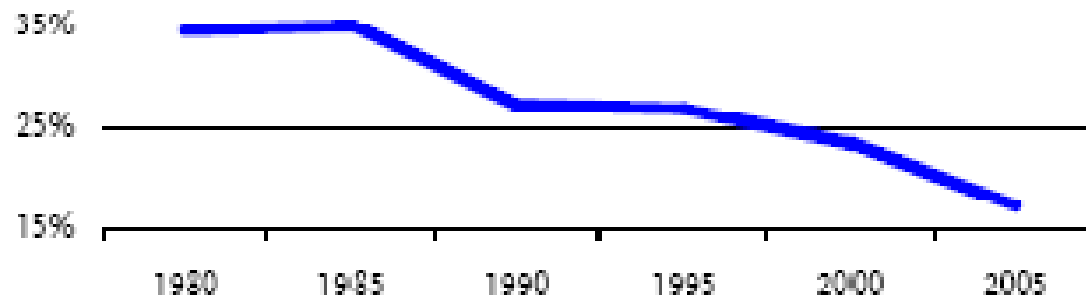


Source: Arbitron/Edison Media Research Internet and Multimedia 2006: On-Demand Media Explodes and comScore Networks. Blue indicates percentage of people who are spending less time with medium while yellow indicates percent growth in internet page views.



# Ad Dollars Follow Consumer Eyeballs

BROADCAST TV ADVERTISING AS A PERCENTAGE OF TOTAL ADVERTISING



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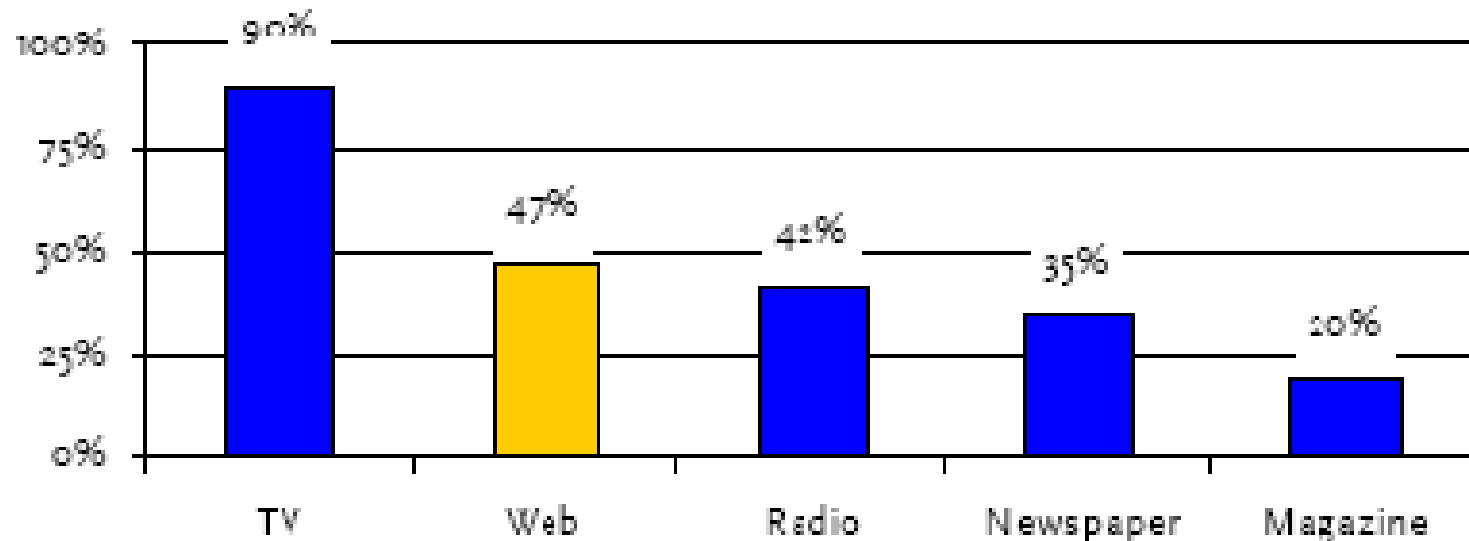
Source: Robert J. Coen - Universal McCann

Global Online Advertising Spending To Grow from \$32 billion in 2006 to \$80 billion in 2011 according to Piper Jaffray.

# The Attention Economy: At Home

## INTERNET IS NUMBER TWO MEDIA AT HOME

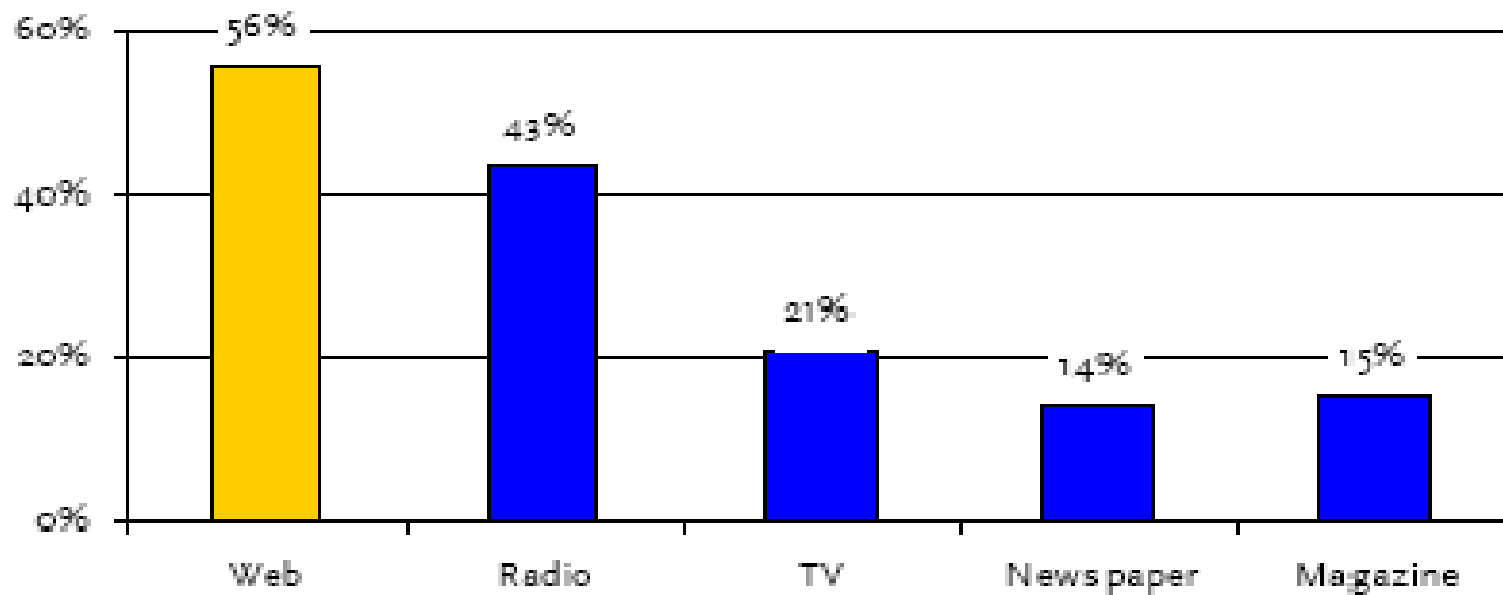
Reach At Home



Source: Ball State University Center for Media Design - A Day in the Life: An Ethnographic Study of Media Consumption

## INTERNET IS NUMBER ONE MEDIA AT WORK

Reach At Work



Source: Ball State University Center for Media Design - A Day in the Life: An Ethnographic Study of Media Consumption

- Search advertising will increase in importance as consumers control their selection of “content”
- Consumers will design their own content and programming – the user, not content, is king
- Users will select products/services more based on reviews, ratings – which will impact advertising – move to social media
- Video will be ubiquitous
- Multi-tasking and multi-channel will be the norm

- CCC Sites – blend content, community and commerce to create compelling user experience
- Users can communicate with one another through social media functionality
- Decide for themselves which content they'd prefer to consume
- Create their own content – ratings, reviews, recommendations, other commentary
- Participate in commerce related to the context of the community in which they are participating



## Content Creation and Consumption

- Hallmark of Web 2.0 – media consumption is now in the hands of the consumer
- Netvibes, iGoogle, MyYahoo – enable users to pick and choose and surround themselves with the content they want
- ProjectPlaylist, Soundpedia – enable listeners to create music playlists, radio stations
- Enable “experience personalization” to retain eyeballs and eardrums

- Even sites that aren't primarily social networks are looking to add community features to get their audiences engaged and retain eyeballs
- Examples of enabling technologies: Ning, KickApps, Google Friend Connect
- Google Friend Connect - any website owner can add a snippet of code to his or her site and get social features up and running immediately without programming
- Can pick and choose functionality like user registration, invitations, members gallery, message posting, and reviews, as well as third-party applications



## Advice to Foreign Companies

- Search engine marketing (SEM) – paid search – pay-per-click (PPC)
- Display advertising
- Search engine optimization (SEO)
- Social media marketing
- Email marketing
- Mobile marketing