PLAYBOOK

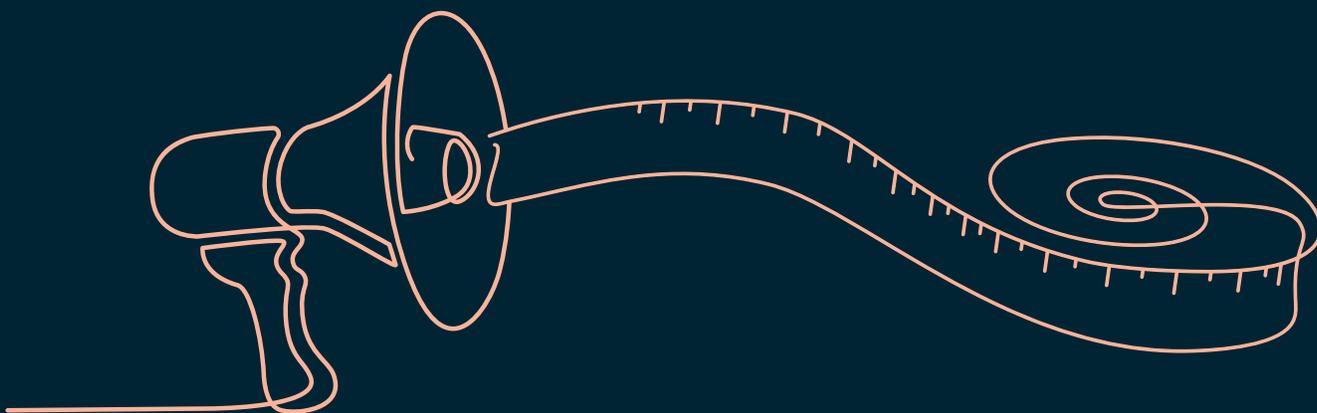**admonsters**

The Targeting and Metrics Evolution: Are Publishers Ready for Attention's Dominance?

An AdMonsters Playbook
September 2023
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What's a Playbook?

A playbook is an extension of what the AdMonsters community has been doing at our conferences for 20 years. A playbook solidifies what has made our events "must attend" for many digital strategists. By bringing people together to share learnings and best practices in a focused way, people can create a plan and avoid hours—if not days—of doing research on their own.

The AdMonsters playbook concept takes existing AdMonsters content (from conferences and AdMonsters.com) and, with the help of the AdMonsters community, "crowd sources" a document that outlines best practices on a particular topic. Our belief is that this will allow for a free exchange of ideas with the benefit of curation for accuracy. This document does not get into specifics around individual solution providers intentionally.

Great effort has gone into writing the playbook in a fashion that applies to as many publishers as possible without becoming too general. In a technology-driven industry like digital advertising, information quickly becomes obsolete. The intention is that, based on the feedback of the AdMonsters community, the next playbook will start to take shape and, with additional contributors, grow in both depth and breadth.

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1. INTRODUCTION

In May of 2023, **Google announced** that Chrome would finally begin phasing out support for third-party cookies in 2024, and recommended that the advertising ecosystem plan for cookie deprecation by integrating its Privacy Sandbox APIs into their products to transition to more private, cookieless solutions.

Are publishers leaning into **Google's Privacy Sandbox**, or are they pursuing other options they deem more favorable to them, their advertising partners and their cookies? More broadly, how are publishers preparing to meet the new challenges and opportunities of 2024? Are they experimenting with creative innovation and ad placements? New targeting tactics? Measurement strategies that demonstrate the value of their inventory?

To get a sense of publishers' plans, AdMonsters surveyed a mix of national and small, web and mobile publishers about a range of issues.

2. EXECUTIVE SUMMARY

Our survey results reveal that 2024 promises to be a year of rapid innovation, with publishers rethinking what's possible:

The New Metric: Attention. As the digital advertising landscape undergoes transformations that limit the use of traditional identifiers, publishers are adapting their measurement practices to meet their advertising clients' expectations. Driven by advertising demand, 82% of publishers said that attention metrics, which evaluate the amount of attention a consumer spends with content, are important or very important to their organizations. We see new metrics emerging, and publishers reporting some success, but new tools and education are still required.

Innovative Ad Formats & Ad Placements. Publishers are realizing that there is significant opportunity to drive higher attention rates by experimenting with new and innovative ad formats (45%) or ad placements (55%), signaling a new era in which the advertising sector turns its focus from innovating in targeting to innovating in creative and placement.

Targeting Capabilities: While cookie-based targeting was mediocre at best, it did enable advertisers to scale their campaigns and develop proxies for their ideal audiences. Today, however, publishers are seeking privacy-compliant ways to home in on receptive audiences. Key among them: leveraging their first-party data.

Indirect Monetization. Some publishers appear open to granting permission for indirect representation of their inventory, allowing marketers to access approved pathways via ads.txt and other sources, even from non-direct partners. To maintain and optimize the list over time, publishers implement monitoring, regular communication, audits, and data analysis. This ensures a strong ecosystem of indirect partners, maximizing monetization while maintaining control and quality assurance.

82%
of publishers say attention metrics are important to their organizations

45%
of publishers are experimenting with innovative creative formats to drive attention

65%
of publishers consider unique demand to be a key criterion in choosing a reseller

3. KEY FINDINGS

- **82%** of publishers say attention metrics are very important or important to their organizations.

- The significant focus on attention metrics is largely driven by the demand from advertisers. **89%** of publishers said that advertiser interest in attention metrics has a notable influence on their organizations' interest in pursuing them. And a quarter of advertisers include attention metrics as campaign criteria in **50%** of their campaign RFPs.

- While attention metrics are widely deemed strategically important, there is still work to be done, as just **21%** of publishers say their inventory is very likely to perform well against such metrics, and only **7%** say their attention metrics fully meet client expectations.

- **45%** of publishers are experimenting with innovative creative formats to drive attention metrics.

- **81%** of publishers plan to leverage their first-party data to help advertisers home in on their audiences.

- While more than half (**54%**) of publishers say that **Seller Defined Audiences** (SDAs) will improve campaign performance and lead to repeat business, only **37%** say their organizations offer SDAs as a targeting tool.

- Half of all publishers are open to indirect partners selling their inventory on their behalf. The reasoning? **65%** of publishers say it provides access to unique demand, and **44%** say they're keen to participate in curated marketplaces.

4. THE NEW METRIC: ATTENTION

Attention is emerging as a new currency for buying inventory. By leveraging attention metrics, publishers can gain insights into user behavior, optimize their campaigns, and deliver impactful results. A big driver is advertiser interest, as attention metrics provide a better way to gauge consumer interest, going beyond surface-level interactions and focusing on actual engagement. Unlike traditional metrics that might count clicks or views, attention metrics measure how much time consumers spend interacting with an ad.

82% of publishers say attention metrics are important to their organizations.

We asked: *How important are attention metrics to your organization?*

Very important
40%

Somewhat important
42%

Neither important nor unimportant
14%

Not important at all
2%

Don't know
3%

INDUSTRY INSIGHT: *Attention metrics are clearly important to publishers. In fact, in an Emodo "**Voice of the Publisher**" survey earlier this year, Attention was the #2 priority for publishers, behind only the economy. In fact, it was dramatically more important than Supply Path Optimization (SPO), an industry talking point many might assume is a high priority.*

89% of publishers say advertisers are influencing their decision to focus on attention metrics.

We wanted to understand the drivers behind the intense interest in attention metrics. We asked: *To what extent does the advertiser's prioritization of attention metrics influence your organization's level of interest?*

Chart:
- Highly influential (27%)
- Somewhat influential (62%)
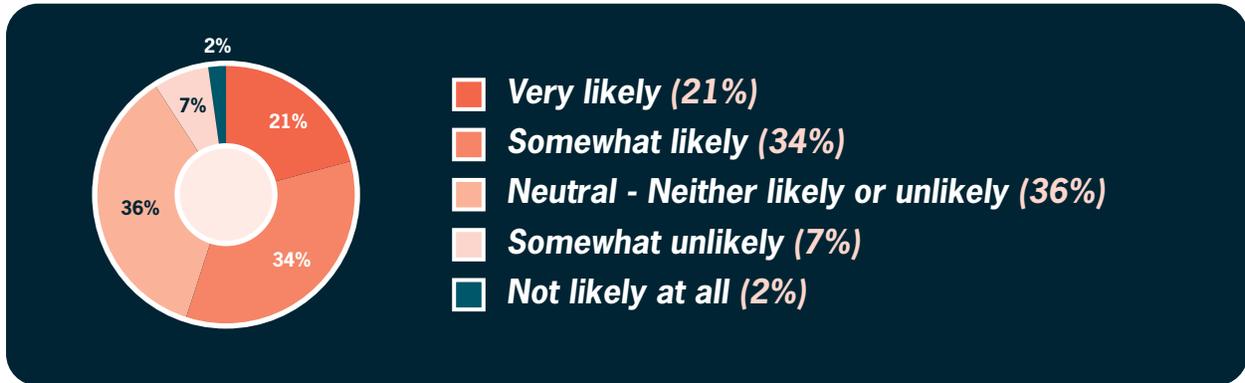- Not very influential (8%)
- Don't know (3%)

25% of advertisers include attention metrics as a campaign criteria in more than half of their campaigns.

It's one thing to say attention metrics are important; it's another to use it as currency for trading inventory. Are publishers seeing attention metrics as campaign criteria in RFPs they receive? We asked: *What percentage of your current clients ask or mandate attention metrics as campaign criteria?*

Chart:
- 1% to 25% (41%)
- 26% to 50% (12%)
- 51% to 75% (7%)
- 76% or higher (17%)
- Don't know (22%)
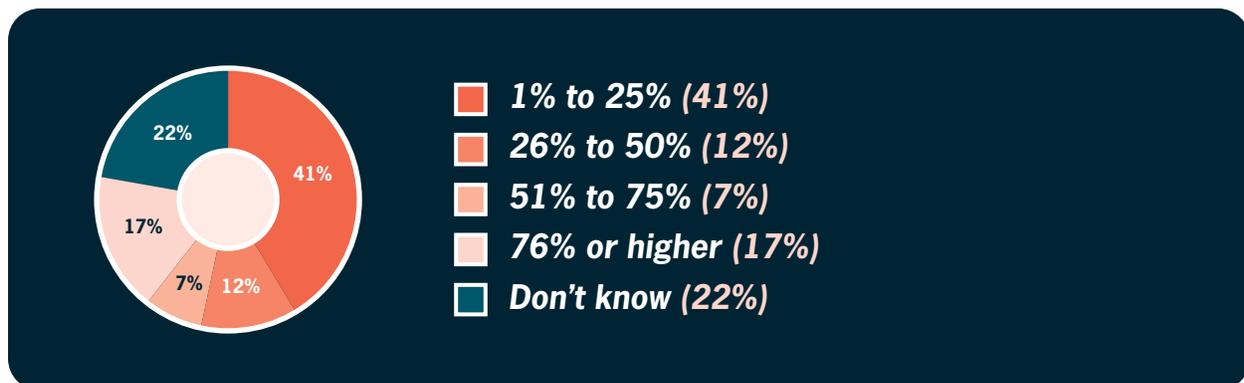
Just 21% of publishers say their inventory will perform well against attention metrics.

How likely is it that your inventory will perform strongly in terms of attention metrics?

Very likely (21%)

Somewhat likely (34%)

Neutral - Neither likely or unlikely (36%)

Somewhat unlikely (7%)

Not likely at all (2%)

2%
7%
21%
36%
34%

New metrics are emerging, but the CTR still dominates campaign criteria.

While click-through rate (CTR) is still a key metric, emerging attention metrics such as scroll rate, ad dwell time and heatmaps are deployed by 20% to 30% of publishers.

CTR
84%

Time on page/duration
71%

Engagement rate
66%

Bounce rate
41%

Scroll depth
30%

Ad dwell time
25%

Heat maps
18%

Don't know
4%

Other
11%

Testing duration times and new creative formats are the key strategies for driving improved attention metrics.

We asked publishers to share the tactics their organizations have implemented to enhance their inventory's attention performance. Experimentation and new creative ad formats are the main strategies.

Experimenting with new creative ad formats to engage consumers
45%

Test, experiment, optimize ad placement to drive duration
55%

Restructure content to drive attention metric
40%

Don't know
20%

Other
5%

PRO-TIP: *There are huge red flags on the horizon. 82% of publishers say attention is a top priority, but few feel they have attention figured out. Publishers know the answer lies in ad formats and placements. This suggests there's an urgent need for publishers to test and adopt innovative ad formats. One way to do so is to work with companies that are innovating in video, native, and CTV with units built with both attention and ad effectiveness in mind.*

How well do your attention metrics meet your clients' expectations?

Fully meet
7%

Somewhat meet
60%

Don't meet
5%

Don't know
27%

INDUSTRY INSIGHT: *"Publishers' current reliance on CTR — and their admission that their current attention metrics don't fully meet advertisers' expectations — are clear signals that publishers still have a lot of opportunity to develop an attention-focused offering for marketers," said DiAngelo. "We agree with publishers that an imperative strategy going forward will be experimenting with more attention-grabbing formats. In fact, this is already occurring, as we found in our own Voice of the Publisher survey earlier in 2023, that publishers who prioritize attention metrics are greater than 50% more likely to rate unique creative formats as a key criterion for choosing monetization partners," explained DiAngelo.*

PRO-TIP: *One problem is attention metrics today largely ignore the impact of ad creative, and instead focus on the impact of the page surrounding an ad, meaning there is often no way to understand how creative format specifically impacts attention. Publishers should explore ways to measure the impact of creative format on attention.*

5. POST-COOKIE TARGETING

As the cookie finally deprecates, publishers are positioning their direct relationship with readers— and the first-party data those relationships deliver — as a path forward.

The tactics the industry anticipated would replace cookie targeting — universal IDs, Seller Defined Audiences and Google Privacy Sandbox — are failing to gain significant traction among the publishers we surveyed. The majority believe the future of their targeting will rest with other ways to leverage their first-party data.

How do you plan to assist your advertisers in effectively reaching their target audiences on your properties? (Select your top 3.)

Publisher first-party data
81%

Universal or alternative IDs
44%

Advertiser first-party data
41%

Seller Defined Audiences
39%

Google Privacy Sandbox
33%

Unique targeting capabilities enabled by monetization partners
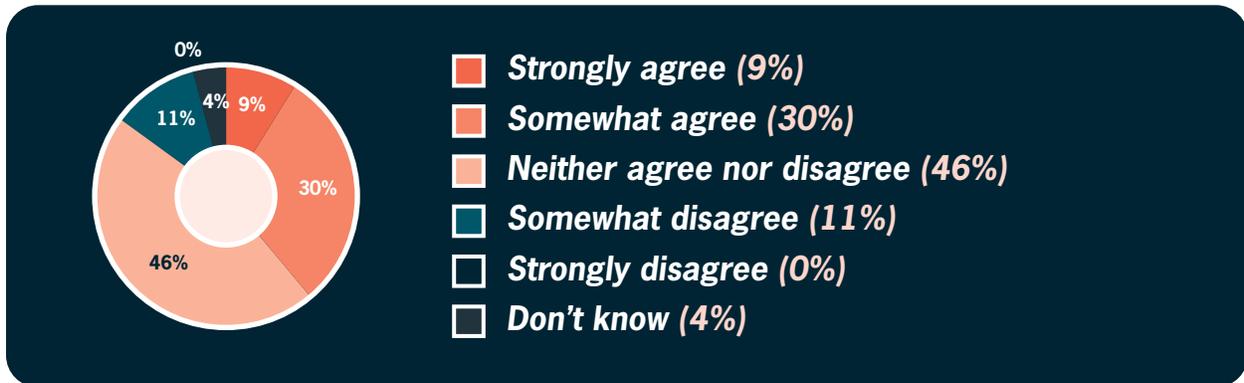22%

Don't know
15%

Other
11%

INDUSTRY INSIGHT: *Publishers know that they will need multiple solutions as no one tactic will meet all of their needs, especially as first-party data and universal IDs offer limited scale. The year ahead will see trial and error as publishers seek to determine which combined approaches work best, while also providing needed scale even in the face of ID loss.*
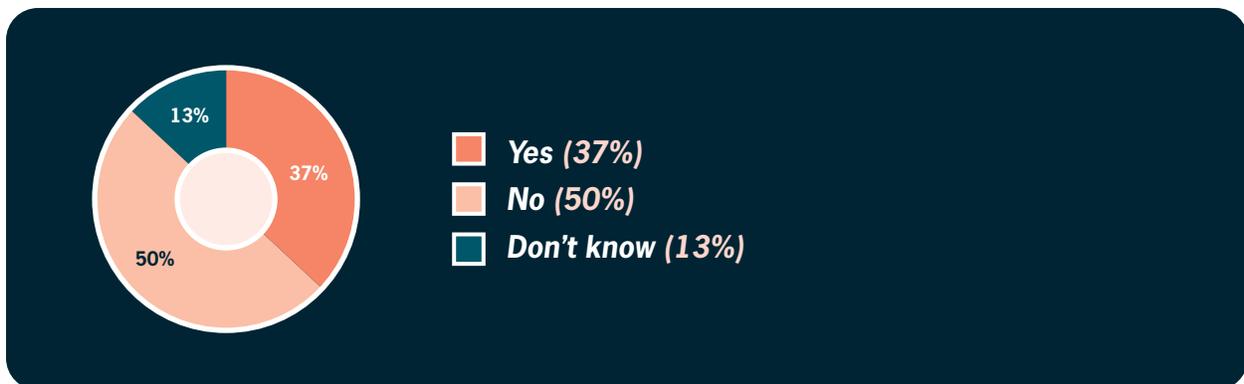
Only 39% of publishers agree that Seller Defined Audiences allow them to control their destiny, and only 37% are currently offering them.

Some, but only a minority, of publishers believe Seller Defined Audiences, built on first-party data, allow publishers to control their destiny by giving them greater control over defining and targeting specific audience segments based on their own insights. And even fewer are offering them today.

To what degree do you agree with this statement, "Seller Defined Audiences allow us to control our destiny."

Strongly agree (9%)
Somewhat agree (30%)
Neither agree nor disagree (46%)
Somewhat disagree (11%)
Strongly disagree (0%)
Don't know (4%)

We ask: *Does your organization offer Seller Defined Audiences currently?*

Yes (37%)
No (50%)
Don't know (13%)

More than half of publishers say Seller Defined Audiences are a ticket to repeat business.

Strong campaign performance is a ticket to repeat business, and half of publishers see Seller Defined Audiences as a driver of campaign results.

We asked: *Please select the top two advantages you anticipate when utilizing Seller Defined Audiences.*

Improves campaign performance for our advertisers, leading to repeat business
54%

Creates more relevant experience for our users
35%

Limits revenue loss from ID deprecation
35%

Opens a new revenue channel for us
28%

Allows us to "control our destiny"
22%

Don't know
15%

**Not applicable**
7%

Other
2%

PRO-TIP: *In the traditional third-party audience segment paradigm, entities outside of the publishing organization benefited from the added value of targeted advertising. Developing strong first-party data targeting solutions will allow publishers to keep that added-value revenue within their walls.*

6. INDIRECT REPRESENTATION OF INVENTORY

Half of the publishers surveyed currently grant permission for indirect representation of their inventory. A key driver is the unique demand that these partnerships may bring to their properties.

50% of publishers work with third parties to sell their inventory.

Do you allow indirect representation (i.e., resellers) of your inventory?

9%

50%

41%

■ *Yes (50%)*
■ *No (41%)*
■ *Don't know (9%)*
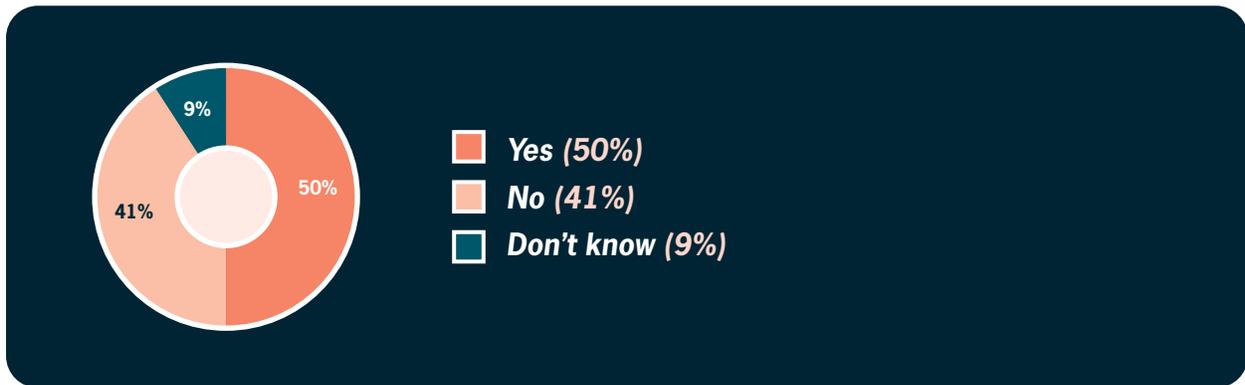
Access to unique demand is the key reason why publishers say yes to a reseller.

We asked: *Which best describes the criteria you use when selecting suitable partners? (Check the top 3.)*

Innovative: the partner has a culture of pushing the envelope to offer cutting-edge features, functionality, and KPIs.
33%

Differentiation: the partner offers ways to differentiate our inventory from the rest of our competition.
31%

Unique demand: the partner offers demand that we wouldn't normally find on our own.
65%

Value add: the partner will include our inventory in curated marketplaces.
44%

Willing to collaborate: the partner works with us to optimize our campaigns regularly, as opposed to a quarterly review
44%

Don't know
21%

Other
2%

INDUSTRY INSIGHT: *"This survey illustrates how important it is for publishers to maintain a well-curated but varied set of monetization partners, both direct and non-direct, especially as a way to access different marketing budgets. It's important to remember, though, that unique demand sources can come from different forms. It's not just about getting new brands or logos. It's just as important to access every budget from that logo. That may require working with additional resellers who, in turn, work with all the other agencies that implement campaigns for that brand," advised DiAngelo. "Programmatic vs. managed budgets are a great example."*

Publishers want simple integrations.

We asked: *When selecting partners to work with, which technical requirements are most important to you? (Check the top 3.)*

Simplicity/ease of integration with the partner
54%

The uniqueness of the partner's demand sources
46%

Reporting tools and UI or API
40%

Level of publisher support and consultation
40%

The match between a partner's demand sources and our content, such as geography or vertical
38%

Approach and solution to ID deprecation
13%

The uniqueness of a partner's creative formats
8%

Don't know
15%

Other
2%

7. THE ATTENTION PLAYBOOK

1. **Pay Attention!** Attention is emerging as a new currency for buying inventory. By leveraging attention metrics, publishers can gain insights into user behavior, optimize their campaigns, and deliver impactful results. Importantly, they can attract advertisers who understand that attention is a more reliable metric of performance-to-business outcomes than traditional metrics, such as CTR.

   Failure to innovate on attention metrics can result in a loss of business or the ability to recruit premium advertisers.

2. **Experiment with Innovative Ad Formats & Placements.** Much of the innovation in the data-driven era of digital advertising has stemmed from targeting tactics. As we move into the attention era, banner ad units will be at a disadvantage. Now is the time to experiment with the kinds of ad formats and ad placements that capture and hold the user's attention, such as dynamically optimized native formats, as well as video and CTV formats.

3. **Measure & Reporting.** Transacting on attention will require a methodology for measuring attention that ad formats deliver by audience. Measuring and reporting on attention metrics can incorporate a lot of data points, including placement and size, viewability rates, relative position, duration, clutter, and device type. Other ways to measure attention include eye tracking, biometrics and user surveys. Start thinking about the types of signals that indicate the attention level of users on your site.

4. **Leverage Your First-Party Data.** Combining first-party data with attention metrics will enable publishers to tell advertisers which audiences pay attention, and which ad formats and placements garner different attention levels by audience. This is strategic insight for advertisers, and it can keep investments in targeting on the publisher's balance sheet. But it's key to remember first-party data can't scale sufficiently, and it's important to pair this approach with other solutions, such as partner data, or targeting initiatives that aren't dependent on deterministic data.

5. **Think Whole Budget:** Publishers are keen to partner with resellers who can bring them unique demand, but big logos have multiple budgets divided up across multiple agencies and services. Rather than limit resellers, consider expanding your network so that you can tap into additional budgets.

8. ABOUT THIS SURVEY

Number of Survey Respondents: 84

Types of Respondents:	
Publisher	82%
Agency	4%
Brand	2%
Technology provider	12%

Publication type:	
General	28%
Lifestyle	19%
Entertainment	13%
Business	10%
Tech	4%
Sports	1%
Financial	0%
Other	25%

How users engage with content:	
Web	96%
Mobile web	87%
Mobile app	55%
Don't know	0%

Number of employees:	
1 to 49	11%
50 to 499	42%
500 to 999	13%
1,000 to 4,999	22%
5,000+	12%

Level of seniority:	
C-suite	13%
Vice President	33%
Director	29%
Manager	13%
Other	12%

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AdMonsters has built its reputation on providing objective editorial leadership based on deep, real-world expertise. We have continued to evolve our editorial strategy to address the changing needs of the market and, as a result, AdMonsters has attracted a highly focused audience who are at the forefront of the industry, and leading marketing partners have found AdMonsters to be a powerful channel to reach these decision makers. Today, our portfolio of integrated media solutions includes industry-leading live events, our innovative Connect content solutions, email marketing programs, and more.

AdMonsters is part of the Access Intelligence family of companies.

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Emodo helps advertisers and publishers create memorable connections with consumers through more relevant, rewarding and impactful advertising. Its intelligent exchange puts creative first, enabling advertisers to build brand love through rich, dynamic creative experiences informed by the latest AI and a deep understanding of consumer sentiment. Emodo's next-generation Adapt native formats outperform alternative programmatic solutions through a better approach to contextual relevance, creative personalization and KPI optimization. As an Ericsson company, Emodo benefits from a wide range of research, innovation, and access to mobile operators that helps it deliver better outcomes to clients and make the unimaginable possible.

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