# U.S. DIGITAL FUTURE IN FOCUS 2015

comSCORE.

Introduction

The digital world achieved enormous progress in 2014 as several transformative changes shaped how Americans interacted with technology and consumed media. Perhaps more so than at any other time in recent memory, changes were not merely incremental but rather seemed to represent key inflection points in the evolution of various markets and behaviors. We saw platforms collide in ways that upended existing markets, reconfigured the economics of various industries, and suggested that we are embarking on a new era of digital that will look markedly different from its predecessor.

Consider some of the digital milestones of 2014 and what they suggest about the future. This was the year that mobile app usage exploded on its way to becoming the majority of all digital media activity. Facebook saw mobile revenues surpass desktop revenues, signaling a shift towards mobile as the primary digital media platform. Traditional TV ratings saw pronounced declines as Americans' viewing habits time-shifted and moved to emerging platforms. And digital advertising in many ways grew up, going through a challenging but important transition to transacting on impressions that are actually seen by people.

In this report, we will examine some of the most important sectors of the digital media ecosystem to show how the landscape has changed, who is leading the way, and what it all means for the year ahead – and beyond. It is an exciting time in digital and we hope this exploration of today's key issues helps put the **Digital Future in Focus.**
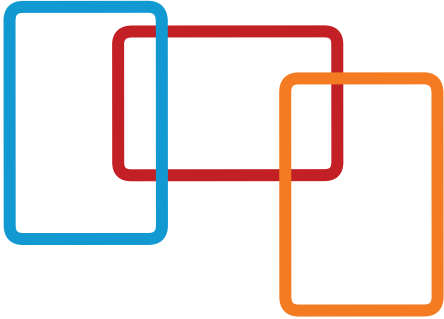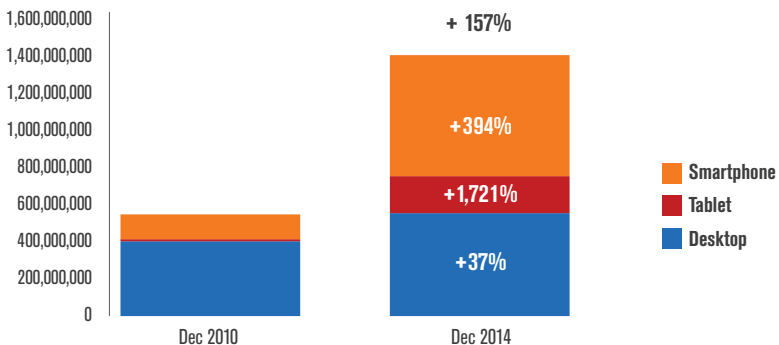
Multi-Platform

- While most of the growth in digital media consumption over the past four years has occurred on smartphones (up 394 percent) and tablets (up 1,721 percent), these mobile platforms are not eating into aggregate time spent on desktop, which has still grown 37 percent over this time period. The digital media pie continues to get bigger and Americans engage with screens during more occasions throughout the day than ever before.

- Across every age demographic, there is a substantially higher percentage of multi-platform and mobile-only internet users than the previous year. More than 3/4ths of all digital consumers (age 18+) are now using both desktop and mobile platforms to access the internet, up from 68 percent a year ago. Mobile-only internet usage is also becoming more prevalent, driven largely by the 21 percent of Millennials who are no longer using desktop computers to go online. Meanwhile, the 55-years-and-older consumer segment is actually the fastest growing faction of mobile users, increasing its combined multi-platform and mobile-only share of audience from 60 percent to 74 percent in the past year.

- Because people prefer different devices depending on the online activity or task, the desktop vs. mobile skews by content category can vary widely. Categories such as Photos and Maps are more often than not used on the go, lending themselves to heavy mobile usage, while the Portals and Business/Finance categories comparatively index much higher on desktop devices. Although Portals function as an accessible hub of information on desktop, the mobile environment is markedly different where apps have taken on the role as the gateway to the web.
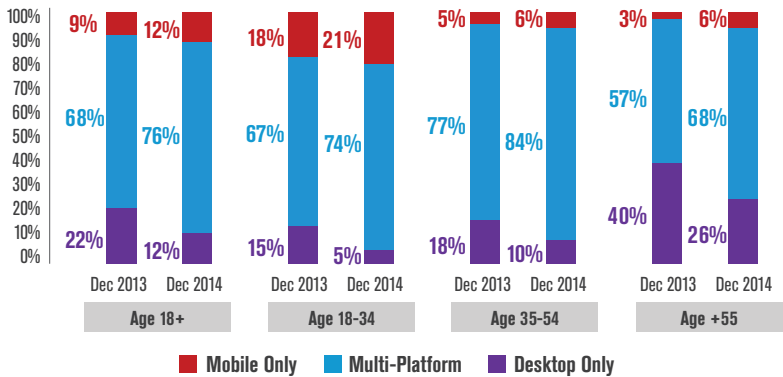
Total Digital Media Time Spent by Platform

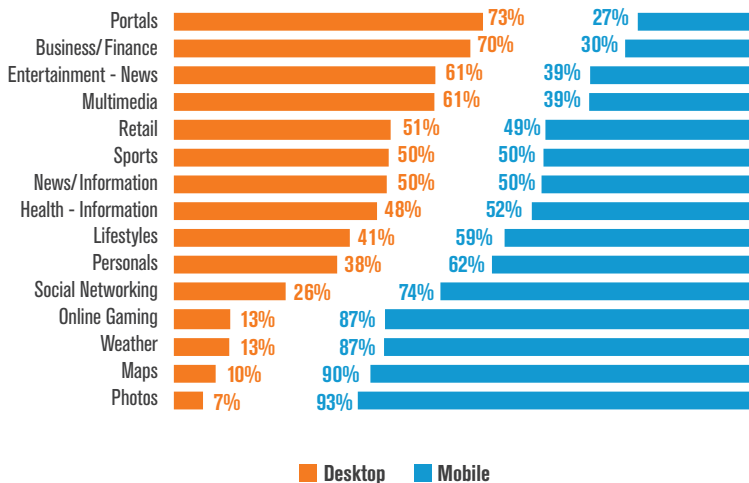Source: **comScore Media Metrix Multi-Platform** & **Mobile Metrix**, U.S., Dec 2014 / Dec 2010

Share of Demographic Audiences by Platform Usage

Source: **comScore Media Metrix Multi-Platform**, U.S., Age 18+, Dec 2014 / Dec 2013

	Age 18+		Age 18-34		Age 35-54		Age +55	
	Dec 2013	Dec 2014	Dec 2013	Dec 2014	Dec 2013	Dec 2014	Dec 2013	Dec 2014
Mobile Only	9%	12%	18%	21%	5%	6%	3%	6%
Multi-Platform	68%	76%	67%	74%	77%	84%	57%	68%
Desktop Only	22%	12%	15%	5%	18%	10%	40%	26%

Share of Content Category Time Spent by Platform

Source: **comScore Media Metrix Multi-Platform**, U.S., Dec 2014

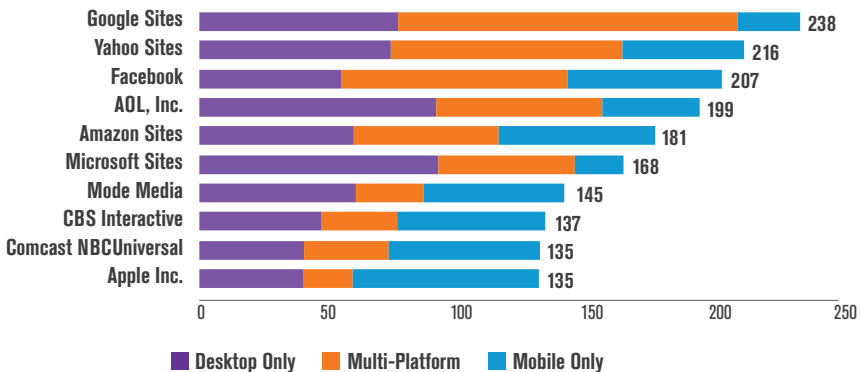| Category	Desktop	Mobile
Portals	73%	27%
Business/Finance	70%	30%
Entertainment - News	61%	39%
Multimedia	61%	39%
Retail	51%	49%
Sports	50%	50%
News/Information	50%	50%
Health - Information	48%	52%
Lifestyles	41%	59%
Personals	38%	62%
Social Networking	26%	74%
Online Gaming	13%	87%
Weather	13%	87%
Maps	10%	90%
Photos	7%	93%

Digital Media

- Google Sites once again ranked as the top overall digital media property in the U.S. with a December 2014 audience of 238 million unique visitors, representing 94 percent of all internet users. Yahoo Sites ranked second with 216 million, while Facebook jumped one spot in the ranking to #3 while reaching the 200 million visitor threshold. Approximately 31 percent of all traffic to the top 10 digital properties was mobile-only visitation.

- A variety of large digital media companies saw exceptional growth in 2014. Myspace, at one time the largest social network on the internet, has seen a surprising renaissance following a pivot to video and music content. As it reignited audience interest, the site boasted one of the fastest growth rates in 2014 in surging 469 percent to nearly 40 million visitors. Several of today's largest social networks, including Linkedin, Snapchat and Vine, also ranked among the fastest risers of the year with growth in the 60 percent range. Additionally, many digital-savvy, new media companies experienced high user growth as they utilized social-friendly content and highly clickable headlines while showing a deep understanding of how the modern digital consumer engages with media. Examples of these properties include Refinery29, Vice, Business Insider and BuzzFeed.

- Mobile apps are quickly becoming the primary access point for many digital services. While the fastest growing mobile apps encompassed a wide range of different categories, some notable ones include ride sharing services Lyft and Uber, which have revolutionized urban transportation. Another app disrupting American culture is Tinder, whose simple "swipe left or swipe right" concept has transformed the modern dating landscape. Walmart was another big winner in the app market this year as its introduction of a Savings Catcher feature made it a must-have app for many shoppers.

Top Digital Properties: Unique Visitors (MM) by Platform

Source: **comScore Media Metrix Multi-Platform**, U.S., Dec 2014

Property	Total
Google Sites	238
Yahoo Sites	216
Facebook	207
AOL, Inc.	199
Amazon Sites	181
Microsoft Sites	168
Mode Media	145
CBS Interactive	137
Comcast NBCUniversal	135
Apple Inc.	135

Legend: ■ Desktop Only ■ Multi-Platform ■ Mobile Only

Y/Y Unique Visitor Growth of Selected Fast Rising Digital Media Properties*

Source: **comScore Media Metrix Multi-Platform**, U.S., Dec 2014 / Dec 2013

Unique Visitors (000)

Property	Growth
Myspace	469%
Refinery29	198%
Vice	173%
EliteDaily.com	111%
NYPost Network	105%
Imgur.com	83%
WashingtonPost.com	71%
Linkedin	68%
SoundCloud.com	67%
Snapchat, Inc	62%
Vine	58%
Maker Studios Inc.	55%
Business Insider	55%
BBC Sites	46%
Woven	44%
BuzzFeed.com	43%
Gawker Media	42%
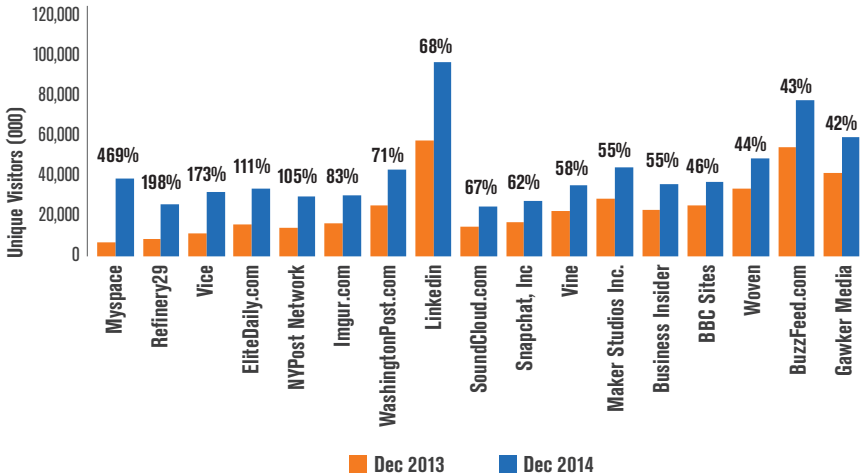
■ Dec 2013   ■ Dec 2014

* Based on selection of digital media properties with at least 20 million unique visitors and growing 40 percent year-over-year.

Y/Y Unique Visitor Growth of Selected Fast Rising Mobile Apps*

Source: **comScore Mobile Metrix**, U.S., Age 18+, Dec 2014 / Dec 2013

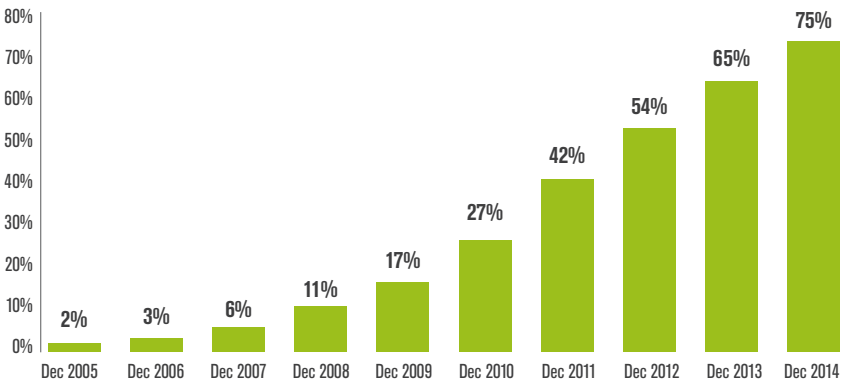| App	Growth
Lyft	835%
Kohl's	793%
Tinder	737%
iTriage	516%
Uber	440%
Bing	361%
NBC Sports Live Extra	360%
QR Reader For IPhone	346%
Walmart	342%
Nike Training Club	208%
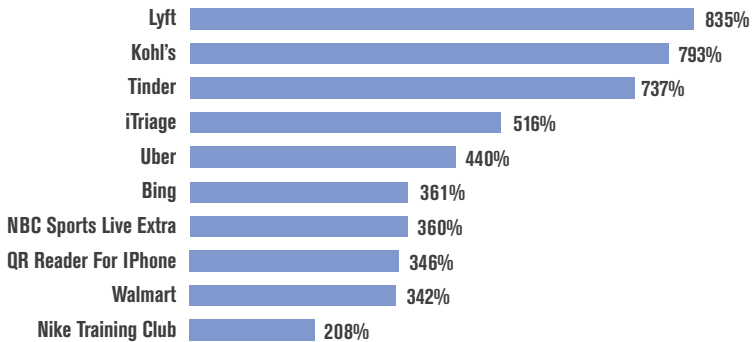
* Based on selection of apps with at least 1 million unique visitors and growing 200 percent year-over-year.

Mobile

- For the past few years, U.S. smartphone penetration has been growing at approximately 10 percentage points a year and reached 75 percent penetration of the mobile user base at the end of 2014. Although the growth in smartphone penetration has begun to see modest evidence of deceleration, at the end of 2014 it was still growing at an annual rate of 16 percent.

- iOS and Android have officially solidified their stranglehold on the smartphone market with a combined 95 percent market share in terms of installed base. While Android maintains the majority at 53 percent, iPhones are not far behind at 42 percent. With the vast majority of apps now being developed only for these two platforms, it becomes increasingly difficult for other platforms to regain a foothold in the U.S. market.

- With its tightly integrated software and hardware, Apple remains the largest smartphone OEM at 42 percent. However, Samsung's popularity among Android users has helped it capture 30 percent of the smartphone market. LG and Motorola were the only two other OEMs with at least 5 percent share. Meanwhile in the feature phone market, which still accounts for a quarter of all U.S. mobile phone users, Samsung and LG continue to lead with a combined 64-percent market share of that sector.
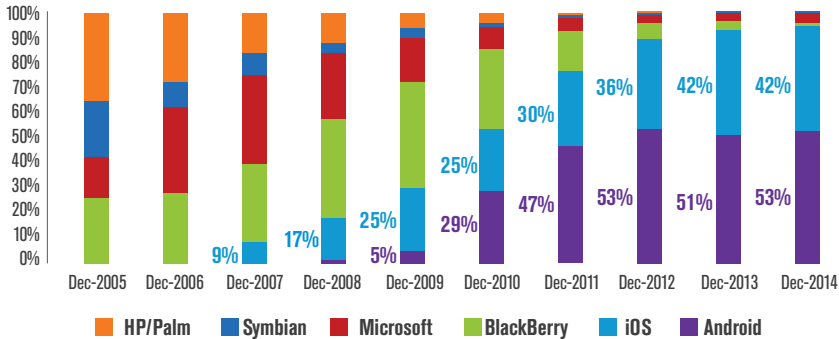
Smartphone Penetration of Mobile Phone Market

Source: **comScore MobiLens**, U.S., Age 13+, 3 Mo. Avg. Ending Dec 2005 - 3 Mo. Avg. Ending Dec 2014

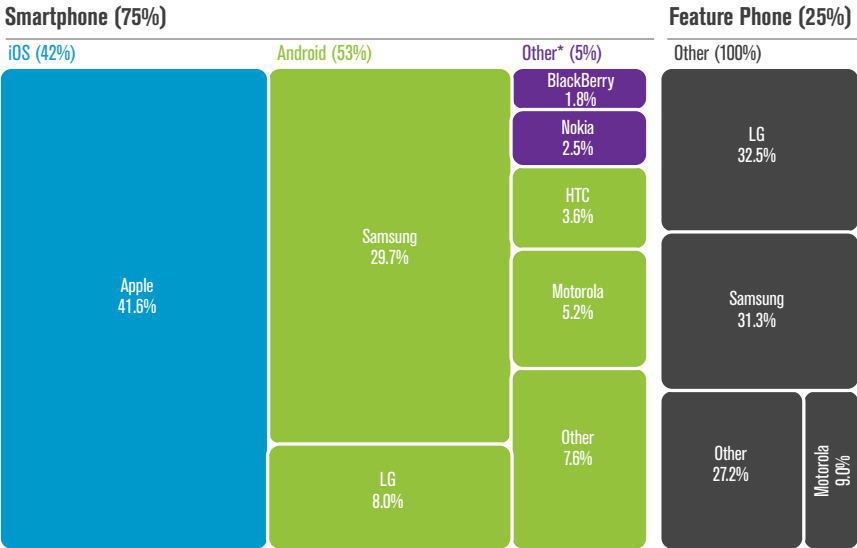| Dec 2005	Dec 2006	Dec 2007	Dec 2008	Dec 2009	Dec 2010	Dec 2011	Dec 2012	Dec 2013	Dec 2014
2%	3%	6%	11%	17%	27%	42%	54%	65%	75%

Smartphone Platform Market Share

Source: **comScore MobiLens**, U.S., Age 13+, 3 Mo. Avg. Ending Dec 2005 - 3 Mo. Avg. Ending Dec 2014

Legend: HP/Palm, Symbian, Microsoft, BlackBerry, iOS, Android

Date	iOS	Android
Dec-2007	9%	
Dec-2008	17%	
Dec-2009	25%	5%
Dec-2010	25%	29%
Dec-2011	30%	47%
Dec-2012	36%	53%
Dec-2013	42%	51%
Dec-2014	42%	53%

U.S. Smartphone and Feature Phone OEM Market Share

Source: **comScore MobiLens**, U.S., Age 13+, 3 Mo. Avg. Ending Dec 2014

Smartphone (75%)

iOS (42%)
- Apple 41.6%

Android (53%)
- Samsung 29.7%
- LG 8.0%

Other* (5%)
- BlackBerry 1.8%
- Nokia 2.5%
- HTC 3.6%
- Motorola 5.2%
- Other 7.6%

Feature Phone (25%)

Other (100%)
- LG 32.5%
- Samsung 31.3%
- Other 27.2%
- Motorola 9.0%

* While not pictured in the above chart, 1.1 percent of smartphone subscribers use a non-Nokia, non-BlackBerry OEM device that does not run on iOS or Android.

Social Media

- Facebook remains the goliath of social media, leading all social networks with 81 percent reach of the total digital population and nearly 230 billion minutes of user engagement. With time spent that is 18x that of the next biggest social network, Facebook had to be excluded from the graphic below in order to show meaningful detail for the others. Of the social networks pictured in the chart, popular photo-sharing site Instagram leads all with 12 billion minutes in time spent, while Snapchat, the ephemeral photo and video messaging app, racked up about half of that — an impressive mark given its more narrow user base and lower overall audience reach. Twitter, Linkedin and Google+ remain mainstays of the market with very high penetration, while Pinterest and Tumblr have both considerably improved their respective positions in the past year.

- Snapchat, Vine, Tumblr and Instagram each have audiences that are predominantly Millennials (i.e. Age 18-34), as visually-oriented social networks continue to draw in young audiences. Snapchat skews the youngest of all the leading social networks, with 71 percent of its audience composed of 18-34 year-olds and 45 percent of its audience 18-24 year-olds. The social networks with the highest overall penetration owe much of their mainstream success to their ability to expand beyond Millennials to older demographic segments, as well.

- According to Shareablee, comScore's social analytics partner, National Geographic ranked as the #1 social brand of 2014 with 579 million total actions, such as likes, shares, comments, retweets, and favorites. High quality photos of animals in the wild, and particularly baby animals, proved highly shareable for the brand, as it garnered nearly 59,000 actions per post. Social video also stood out as one of the most effective ways to engage audiences across platforms, with total actions on video posts growing by 147 percent in 2014. Other brands faring well in the ranking included three pro sports leagues: NBA, NFL and MLB.
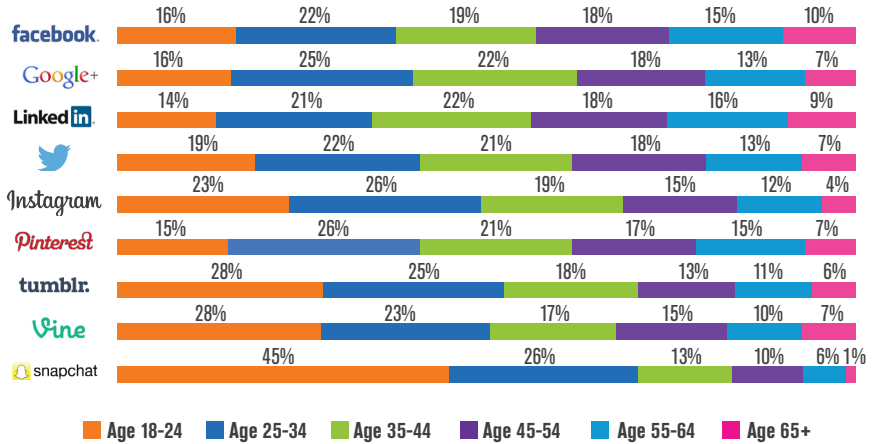
Multi-Platform Audience Penetration vs. Engagement of Leading Social Networks

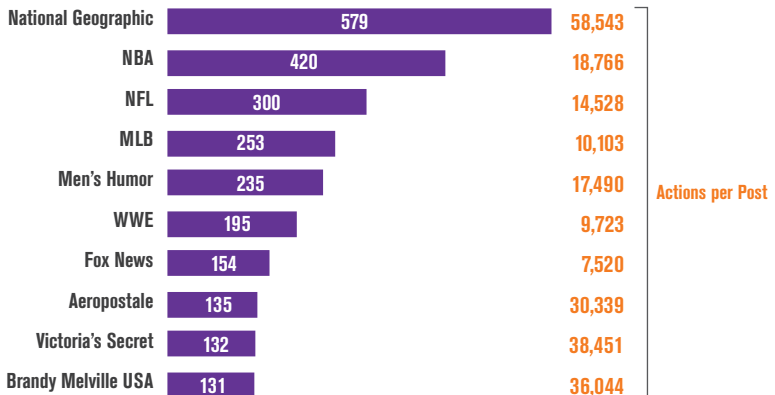Source: **comScore Media Metrix Multi-Platform**, U.S., Dec 2014
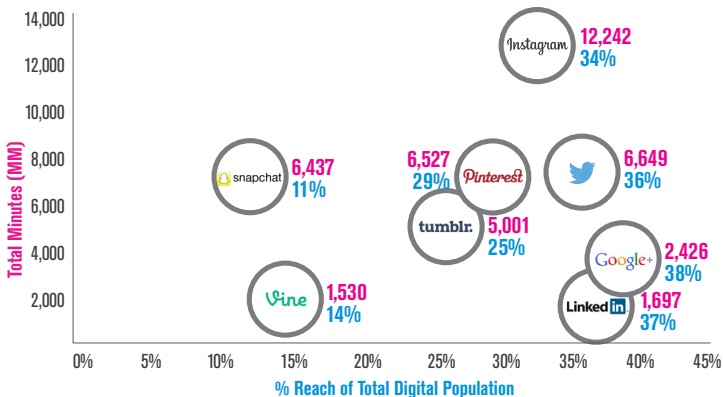
Demographic Composition % of Leading Social Networks

Source: **comScore Media Metrix Multi-Platform**, U.S., Age 18+, Dec 2014

	Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65+
facebook.	16%	22%	19%	18%	15%	10%
Google+	16%	25%	22%	18%	13%	7%
Linked in.	14%	21%	22%	18%	16%	9%
Twitter	19%	22%	21%	18%	13%	7%
Instagram	23%	26%	19%	15%	12%	4%
Pinterest	15%	26%	21%	17%	15%	7%
tumblr.	28%	25%	18%	13%	11%	6%
Vine	28%	23%	17%	15%	10%	7%
snapchat	45%	26%	13%	10%	6%	1%

■ Age 18-24　■ Age 25-34　■ Age 35-44　■ Age 45-54　■ Age 55-64　■ Age 65+

Top Brands by Total Social Actions* (MM)

Source: **Shareablee**, U.S., Jan. 1 - Dec. 31, 2014

Shareablee

Actions per Post

Brand	Total Social Actions	Actions per Post
National Geographic	579	58,543
NBA	420	18,766
NFL	300	14,528
MLB	253	10,103
Men's Humor	235	17,490
WWE	195	9,723
Fox News	154	7,520
Aeropostale	135	30,339
Victoria's Secret	132	38,451
Brandy Melville USA	131	36,044

* Total social actions include the sum of likes, shares, comments, retweets and favorites received by all the posts published by a brand on Facebook, Twitter and Instagram, for the defined time period.
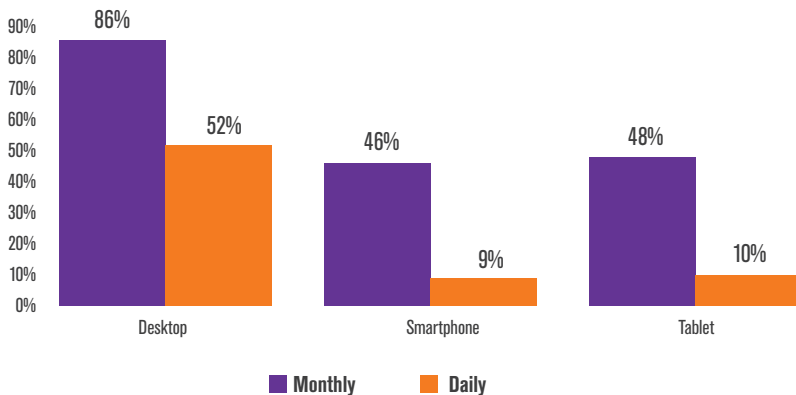
Video

- Digital video viewing still occurs most frequently via desktop computer, but mobile video viewing is on the rise. Nearly 7 in 8 Americans watch online video, with more than half doing so daily. Slightly below half of smartphone and tablet users watch video on their devices, with about 1 in 10 doing so daily, suggesting there is significant room for continued growth. Over-the-top (OTT) devices such as Apple TV, Google Chromecast, and Microsoft Xbox are also gaining adoption and driving extended engagement of digital video viewing.

- Although desktop video is a mature medium, total viewership and engagement per viewer continue to post gains. By the end of 2014, the number of monthly unique video viewers on desktop fell just short of 200 million, with each viewer watching more than ten videos per day on average.

- YouTube remains the #1 online video destination, with 159.5 million desktop viewers in December. The popularity of professionally and semi-professionally produced content on YouTube Channels continues to drive engagement on the platform, with VEVO ranking as the #1 channel with 44.2 million viewers, followed by Disney/Maker Studios (42.6 million) and Fullscreen (36.9 million). VEVO also led the Top 10 YouTube Channels with 15 videos watched per viewer in December 2014.
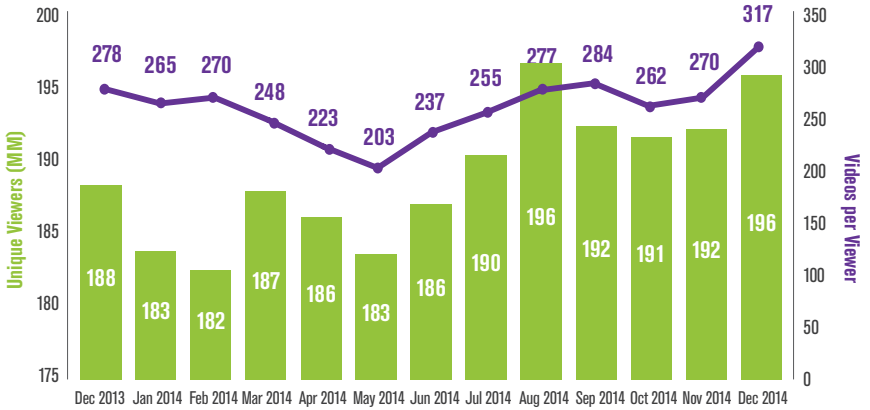
Video Viewer Penetration by Platform: Monthy vs. Daily

Source: **comScore Video Metrix**, U.S., Dec 2014
comScore MobiLens & TabLens, U.S., Age 13+, 3 Mo. Avg. Ending Dec 2014
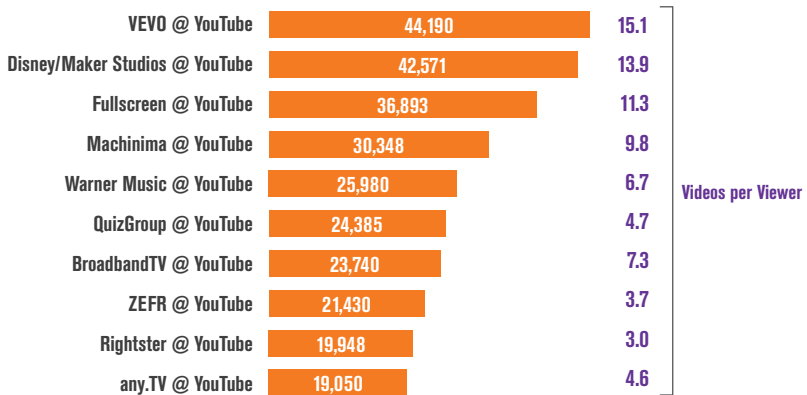

Chart — Video Viewer Penetration by Platform (Monthly vs. Daily):
- Desktop: Monthly 86%, Daily 52%
- Smartphone: Monthly 46%, Daily 9%
- Tablet: Monthly 48%, Daily 10%

Legend: ■ Monthly ■ Daily

Total Desktop Video Unique Viewers (MM) vs. Videos per Viewer

Source: **comScore Video Metrix**, U.S., Dec 2013 - Dec 2014

Unique Viewers (MM) / **Videos per Viewer**

Month	Unique Viewers (MM)	Videos per Viewer
Dec 2013	188	278
Jan 2014	183	265
Feb 2014	182	270
Mar 2014	187	248
Apr 2014	186	223
May 2014	183	203
Jun 2014	186	237
Jul 2014	190	255
Aug 2014	196	277
Sep 2014	192	284
Oct 2014	191	262
Nov 2014	192	270
Dec 2014	196	317

Top YouTube Channels by Desktop Unique Viewers (000)

Source: **comScore Video Metrix**, U.S., Dec 2014

| Channel	Unique Viewers (000)	Videos per Viewer
VEVO @ YouTube	44,190	15.1
Disney/Maker Studios @ YouTube	42,571	13.9
Fullscreen @ YouTube	36,893	11.3
Machinima @ YouTube	30,348	9.8
Warner Music @ YouTube	25,980	6.7
QuizGroup @ YouTube	24,385	4.7
BroadbandTV @ YouTube	23,740	7.3
ZEFR @ YouTube	21,430	3.7
Rightster @ YouTube	19,948	3.0
any.TV @ YouTube	19,050	4.6

Advertising

- The U.S. online advertising market has seen a heightened emphasis on the use of viewable impressions, or those rendering within the viewable portion of the web browser, as a basis for the buying and selling of ads. comScore's latest vCE Benchmarks indicate that 46 percent of U.S. display ads are viewable, a rate that is actually the same as the prior year. Although many publishers are improving their website design to optimize for viewability, the uptick in ad fraud has likely negated these gains, making it appear that there has been little progress on this issue.

- Ad fraud, and the overall incidence of ad impressions being delivered to non-human traffic (NHT), became a huge issue in 2014 as the industry came to grips with the gravity of the problem. Recent comScore research showed that among hundreds of digital ad campaigns measured in November 2014, 21 percent of them had NHT levels of at least 5 percent, and those campaigns accounted for 75 percent of all NHT impressions. Not every campaign is affected in the same way, but fraud has the potential to threaten any campaign and can create a substantial amount of waste.

- Once advertisers ensure their ads are delivered in-view to actual people, measurement of ad effectiveness becomes more accurate and meaningful. comScore's brand survey lift norms for desktop and mobile ad campaigns show the average increases in brand awareness, favorability, likelihood to recommend and purchase intent. The 2014 mobile ad norms show increases of between 2.5-4 percentage points, notably higher than the typical 1-2 percentage point average for desktop display ads, likely reflecting the better targeting, higher in-view rates, lack of ad clutter, and proximity to the point purchase for mobile ads.

Percentage of Viewable Ad Impressions in U.S.

Source: **comScore vCE** Norms, U.S., Q3 2014

Non-Viewable 54%

Viewable 46%
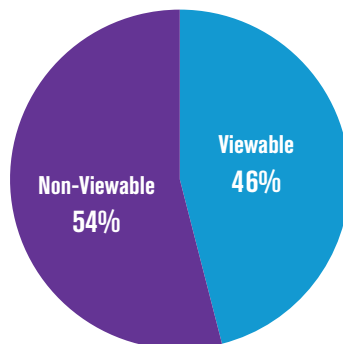
Advertiser/Campaign Non-Human Traffic (NHT)

Source: **comScore Custom Analytics**, U.S., November 2014

| % NHT in Campaign	% of Total Campaigns	% of Total NHT Impressions	Average NHT per Campaign
< 5%	79%	25%	1%
5%-20%	14%	45%	11%
> 20%	7%	30%	31%

79% of the campaigns have <*5%* NHT, accounting for *25%* of the total NHT impressions.

14% of the campaigns have *5-20%* NHT, accounting for *45%* of the total NHT impressions.

7% of the campaigns have >*20%* NHT, accounting for *30%* of the total NHT impressions.

Percentage Point Lift from Mobile Advertising

Source: **comScore mBSL Benchmarks**, U.S., 2014

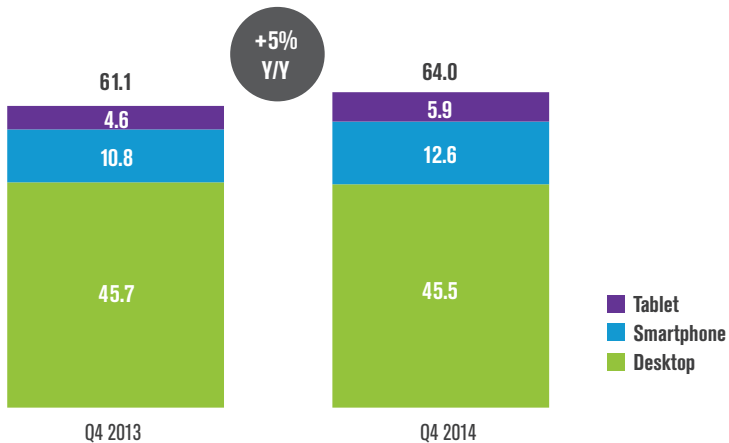|	
Aided Awareness	+2.5
Favorability	+3.0
Likelihood to Recommend	+4.3
Purchase Intent	+4.3
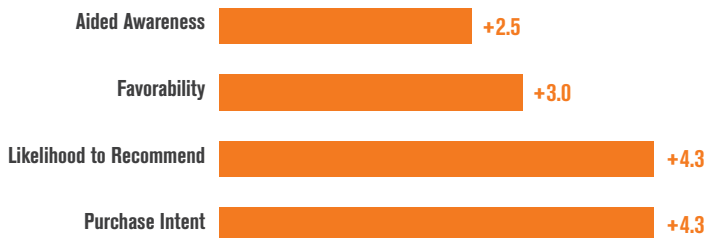
Search

- The total U.S. multi-platform web search market grew 5 percent in query volume in Q4 2014 vs. the previous year. Mobile search, which includes queries conducted via app and mobile browser, now accounts for 29 percent of all search activity, with smartphones driving a greater share (20 percent) than tablets (9 percent).

- As consumers shift their digital activity to mobile, growth in the search market is being driven by both smartphones (up 17 percent from the prior year) and tablets (up 28 percent). Desktop search, meanwhile, has declined marginally during the same period.

- Google remains the leader in the U.S. explicit core search market with 66 percent market share of search queries conducted in Q4 2014, followed by Bing at 20 percent and Yahoo at 11 percent. Bing increased its market share in 2014, while Yahoo's recent search partnership with Firefox has also bolstered its share. In terms of multi-platform search activity measured by comScore, Google's strong leadership on both smartphones and tablets boosts its share of the multi-platform search market by several percentage points vs. desktop alone.

## Total Multi-Platform Web Searches* (Billions) by Platform

Source: **comScore qSearch Multi-Platform,** U.S., Q4 2014 / Q4 2013

+5% Y/Y

	Q4 2013	Q4 2014
Total	61.1	64.0
Tablet	4.6	5.9
Smartphone	10.8	12.6
Desktop	45.7	45.5

■ Tablet
■ Smartphone
■ Desktop

* Total multi-platform web searches include all web searches conducted on desktop, smartphone and tablet. Note that web searches on desktop differ from "explicit core search" and comScore's monthly desktop search rankings
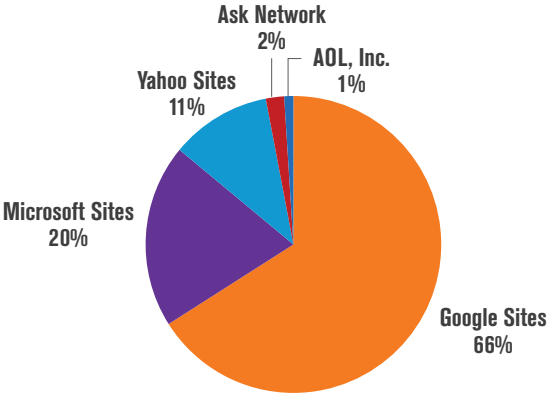
Y/Y Growth in Total Searches by Platform

Source: **comScore qSearch Multi-Platform**, U.S., Q4 2014

28%
Tablet

17%
Smartphone

-1%
Desktop
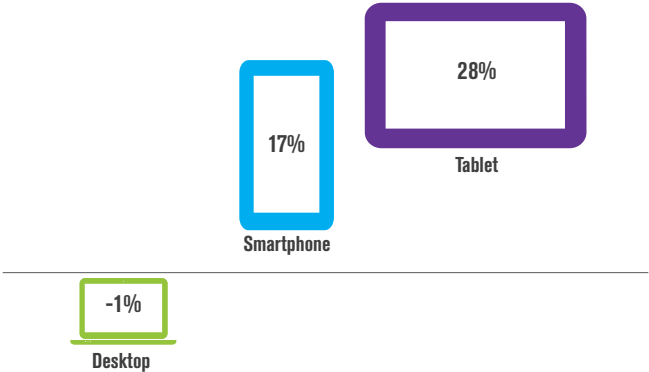
Share of Desktop Searches for Explicit Core Search Market

Source: **comScore qSearch**, U.S., Q4 2014

Ask Network
2%

AOL, Inc.
1%

Yahoo Sites
11%

Microsoft Sites
20%

Google Sites
66%

*Q4 2014 market share only partially reflects the impact of Yahoo's search deal with Firefox, which drove a material share increase for Yahoo from November to December

E-Commerce

- Total U.S. retail digital commerce grew 14 percent in 2014 to $268.5 billion. Desktop-based e-commerce increased 13 percent to $236.9 billion, while mobile commerce jumped 28 percent to $31.6 billion.

- Although mobile commerce is growing at more than twice the rate of desktop e-commerce, there is still a significant mobile monetization gap. Mobile now accounts for 60 percent of digital retail engagement as measured by time spent, but only 13 percent of dollars. As friction gets removed from the mobile purchase process, gains in sales can be expected to accelerate.

- The top-gaining digital commerce product category in 2014 was Digital Content & Subscriptions, which includes downloadable music, movies, books and apps. The category grew 27 percent in the past year, and was joined by Consumer Packages Goods (up 21 percent) and Apparel & Accessories as the only categories to exceed 20 percent growth in 2014.
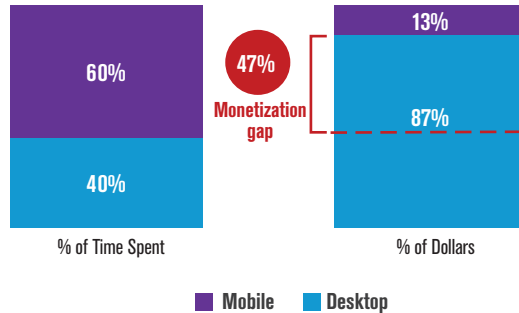
Total U.S. Retail Digital Commerce Growth

Source: **comScore e-Commerce** & **m-Commerce Measurement**, U.S., 2012 - 2014

Percentages (red line, top): 21%, 17%, 17%, 17%, 15%, 16%, 14%, 12%, 13%, 13%, 14%, 16%

Quarter	Mobile	Desktop
Q1 2012	4.5	44.3
Q2 2012	3.8	43.2
Q3 2012	4.6	41.9
Q4 2012	7.2	56.8
Q1 2013	5.9	50.2
Q2 2013	4.7	49.8
Q3 2013	5.8	47.5
Q4 2013	8.3	63.1
Q1 2014	7.3	56.1
Q2 2014	6.8	54.8
Q3 2014	6.7	53.9
Q4 2014	10.7	72.1

■ Mobile ■ Desktop
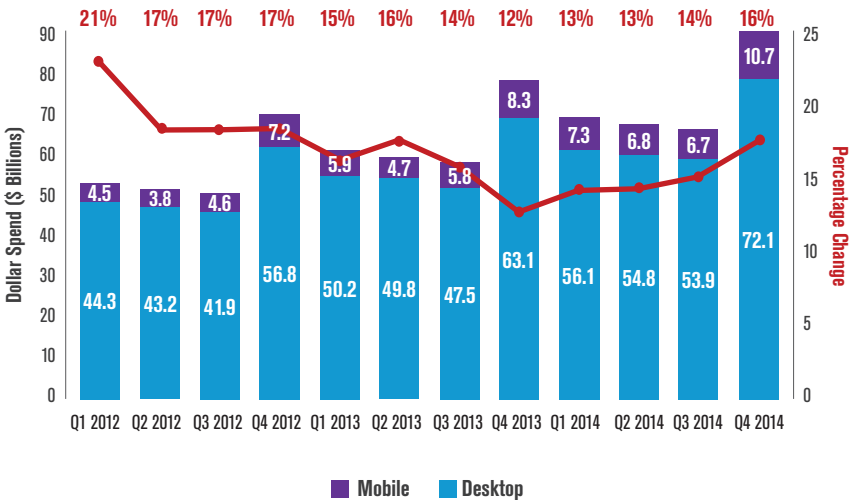
% of Time Spent* vs. % of Retail Dollars Spent by Platform

Source: **comScore Media Metrix Multi-Platform**,
e-Commerce & **m-Commerce Measurement**, U.S., Q4 2014

% of Time Spent		% of Dollars
60% (Mobile)	**47%** Monetization gap	13% (Mobile)
40% (Desktop)		87% (Desktop)

Legend: ■ Mobile ■ Desktop

* Netflix duration excluded from Retail category.

Y/Y % Change in Total Retail Digital Commerce Dollars by Category

Source: **comScore e-Commerce** & **m-Commerce Measurement**, U.S., 2014 / 2013

Category	Change
Digital Content & Subscriptions	27%
Consumer Packaged Goods	21%
Apparel & Accessories	20%
Sport & Fitness	17%
Office Supplies	15%
Furniture, Appliances & Equipment	15%
Home & Garden	14%
Toys & Hobbies	14%
Total Digital Commerce	14%
Consumer Electronics	14%
Computers / Peripherals / PDAs	14%
Event Tickets	8%
Video Games, Consoles & Accessories	7%
Music, Movies & Videos	6%
Flowers, Greetings & Misc Gifts	6%
Books & Magazines	2%
Jewelry & Watches	-1%
Computer Software	-4%

Conclusion

As 2014 fades further in our rear view mirror and we ponder the road ahead, it is time to put the digital future in focus. So many recent innovations and milestones have laid the groundwork for a year ahead that presents opportunities up and down the digital media ecosystem. We would like to outline ten trends in digital that we feel are of particular importance and will shape what happens in 2015.

Ten Trends to Define 2015

1. Viewability Moves Closer to Becoming Currency, Better Aligns Dollars with Impact

Digital ad buyers and sellers have undergone a sometimes painful but necessary transition toward using viewable impressions as currency. Publishers willing to be held to this standard will also need to demonstrate that their viewable inventory has been undervalued because its effectiveness has been systematically understated by the non-viewable ads. As non-human traffic and non-viewable ads get purged from the ecosystem, dollars will follow the inventory that actually helps marketers reach their desired audiences and influence consumer perceptions and purchase behaviors.

2. App Curation Improves Discovery, Expands the Market

The Apple and Android app stores have more than 1.3 million available apps and not enough download activity to support much of what's out there. And if getting an app downloaded wasn't already difficult enough, the average mobile user uses only a handful of apps regularly with 75 percent of usage time concentrated within their top four apps. Outside of the app store rankings, users lack a well-optimized and curated way of finding the best apps for them. Look for new approaches that leverage the social graph to aid in app discovery, serving to diversify app usage and help build more sustainable mobile-first businesses in the mid and long-tail of the market.

3. The Rise of the Short-Form Video Ad Demands New Set of Creative Skills

The entire digital ecosystem is fighting to deliver high-quality video inventory with many of the leading social and video platforms playing a key role. Because social channels are generally better suited to short-form content, much of the video innovation has been in the introduction of short-form ads that are between five and ten seconds. While Vine first popularized the six-second video, Facebook, Instagram, and Twitter are making bigger plays in video, increasing the need for short-form video ads that provide a quick and visually compelling brand experience. In trading depth of engagement for scale, it will demand a new set of creative skills from agencies seeking to fulfill these new requirements.

4. M-Commerce Begins Closing the Gap, But Conversion Won't Get Solved Overnight

To date, not enough conditions have been met for mobile commerce to realize its full potential. But with the continued uptick in smartphone screen size, improved connection speeds, and apps and mobile websites better optimized for conversion, we should see more smartphone users become comfortable with converting on their phones. Enough of the market enablers have aligned to accelerate m-commerce growth in 2015, and while it is expected to surge past 15 percent of digital commerce before the end of the year, it will still be far from realizing its full potential.

5. Social Moves Down Funnel with "Buy Button"

Pinterest is already gaining traction as an ad platform as it rolls out its Promoted Pin native ad units, which promise exposure among users who are already exhibiting some level of intent in their browsing behavior. But reports of integrating a "buy button" suggest Pinterest is looking closely at ways to more directly tie exposure to purchase behavior and demonstrate the effectiveness of these ads. Other social networks are also rumored to be working on "buy buttons," suggesting this is a theme to watch closely in 2015 as major companies look to diversify from predominantly ad-based revenue streams to those more closely associated with commerce.

6. Native Ads Scale to Accelerate Mobile Ad Monetization

Native advertising has the straightest and clearest path to ad monetization on mobile, with companies like Facebook and Twitter showing that this channel can deliver ad dollars in rough alignment with consumers' usage patterns. While large platforms have the benefit of scale and being able to package their mobile inventory alongside online ads, the emergence of native ad platforms will enable the aggregation of inventory that will facilitate cross-platform campaigns and improve monetization and sell-through of native ad inventory on mobile. "Scalable native advertising" almost sounds like an oxymoron, but with many consistencies in how these ads are being deployed across sites, there are real opportunities for aggregation – not only across publishers but across platforms.

7. Lines Blurring Between Tech and Content Bring New Challenges, Opportunities

2014 gave birth to the term "vertically integrated digital media company," as traditional publishers trying to adapt to the digital environment recognized the need to use technology and content optimization strategies to build economically sustainable businesses. At the same time, the increasing number of digital companies acting as both platforms and content producers suggests the inevitable intersection of technology and content. While this shift may be seen as an existential threat to the news business, it also represents a new opportunity that not only places value on high-quality information content, but enables it to reach audiences on a scale not previously available before. Many publishers who were once relegated to audiences mostly within their immediate geographic boundaries are now establishing very large audiences on other continents.

8. Cross-Platform Video Measurement Takes Critical Steps from Dream to Reality

As fall 2014 TV ratings saw the first undeniable evidence of systematic declines, the economic implications of audience and platform fragmentation become clear. There is no stopping the bleed of coveted 18-49 year-old audiences from traditional linear TV, but innovation in measurement systems this year will enable their unique viewing patterns to be accounted for on other platforms. The reality is that sizeable incremental audiences drive high viewing engagement on desktop, smartphone, tablet and over-the-top devices, and without quantifying this behavior in the context of TV viewing, content owners will lose money and advertisers will have fewer options for marketing effectively.

9. Media Content Focus Shifts Back to Quality and 'Long-Form'; Attention Gets More Attention

In reaction to the recent trend in viral content publishing, there will be a shift back towards more in-depth content experiences in journalism, video and audio. Curation of quality written content on premium publishers will become more of an emphasis, as writing platforms such as Medium will help democratize written content while solving for the distribution challenge experienced by many self-publishers. Following the runaway success of NPR's Serial, podcasting appears to be in the early innings of a renaissance with a real opportunity to gain mainstream audiences this time around. As these experiences find their ways to modestly sized, but very highly engaged audiences, metrics demonstrating the importance of attention will get a bigger seat at the table.

10. The Next Era of Innovation: Bridging the Digital and Physical Worlds

Watch out for wearables as the harbinger of the next big thing in tech innovation. As with new product categories that preceded it, it can be difficult to predict all of the potential applications that will add value to our lives until the product is in our hands (or in this case, on our wrists). With the recent launch of the Apple Watch sure to gain at least some level of mainstream adoption, developers will race to invent the "killer app" for this platform. While health monitoring and digital payments innovation seem like sure bets, a host of day-to-day 'internet of things' applications seem within grasp, such as turning on lights, unlocking doors and activating alarms. If wearables emerge as a physical connector between these worlds, then we must also look at how its data exhaust will spur innovation. A higher quantity and quality of data about speed, physical location, and purchase behavior also means new ways of tying behavior to outcomes.

comScore Brand Survey Lift™ Mobile

Brand Survey Lift Mobile (BSL™ Mobile) is a survey-based solution that quantifies the branding impact of a mobile campaign, providing actionable insights into the effectiveness of advertising across the mobile web and applications. The solution measures lifts across a variety of key branding metrics, such as awareness, message recall and purchase intent, to optimize mobile campaigns and eliminate wasted ad spend.

comScore e-Commerce Measurement™

e-Commerce Measurement provides an accurate, timely and comprehensive view of consumers' online shopping and spending behavior. Leveraging comScore's panel of more than 2 million internet users, e-Commerce Measurement is used by retailers, travel suppliers, financial analysts, credit card issuers, publishers and manufacturers to understand competitive performance and online marketing strategies.

comScore Media Metrix® Multi-Platform

Media Metrix Multi-Platform is an industry-leading digital media measurement platform that provides an unduplicated view of total digital audience behavior across desktops, smartphones and tablets. Leveraging the comScore UDM® methodology, Media Metrix Multi-Platform measures total audience size, demographic composition, engagement, performance within key user segments and behavioral trends in the consumption of browser, mobile app and video content. With this digital measurement suite, publishers can showcase the value of their audiences while agencies and advertisers can create holistic media plans across platforms.

comScore Mobile Metrix®

Mobile Metrix is a mobile measurement solution that captures total mobile audience behavior on browsers and apps across smartphones and tablets. Leveraging the comScore UDM® methodology, Mobile Metrix measures total mobile audience reach, mobile demographic composition, engagement and consumer behavioral trends. As part of the Media Metrix Multi-Platform suite, publishers can use Mobile Metrix to showcase the value and scale of their mobile audiences and benchmark against competitors, while agencies and advertisers can strategically plan and buy mobile advertising to achieve their campaign objectives.

comScore MobiLens®

MobiLens is a survey-based market research tool that provides the latest insights about consumers' mobile usage trends, demographics and behaviors across mobile devices. Used by media buyers, media sellers and mobile phone manufacturers, MobiLens connects data on mobile consumer demographics and behaviors with device capabilities. By matching consumer behavior with smartphone devices, MobiLens quantifies the mobile phone market in terms of subscribers and device penetration by manufacturer.

comScore qSearch™

qSearch is an online search tool that tracks online search activity across search engines and websites to identify search trends and behaviors of target audience segments. Leveraging the comScore UDM® methodology, qSearch measures actual search volume and intensity for all traditional search engines as well as other leading sites such as eBay, Facebook and Wikipedia. Publishers use qSearch to understand their referral traffic sources and optimize their organic or paid search strategy. On the buy side, agencies and advertisers can evaluate the worldwide search market and research competitors' search strategy to optimize their marketing mix.

comScore TabLens®

TabLens is a survey-based market research tool that provides the latest insights on the U.S. tablet market including consumer usage trends and behaviors on tablets. Used by media buyers, media sellers and mobile device manufacturers, TabLens offers an in-depth view of tablet owners, providing insights into device-level adoption, content consumption and consumer demographics.

comScore validated Campaign Essentials™

validated Campaign Essentials (vCE®) is an integrated solution for complete campaign delivery validation and in-flight optimization. Unlike existing single-point solutions, vCE provides an unduplicated accounting of impressions delivered across a variety of dimensions, such as in-target, in-view, in-geo, brand safe and free from non-human traffic (NHT). Used by media buyers and sellers, vCE enables decreased waste and increased campaign effectiveness.

comScore Video Metrix®

Video Metrix is a digital video measurement solution that delivers end-to-end measurement of consumers' digital video consumption of both video content and advertising on desktops. Leveraging the comScore UDM® methodology, Video Metrix captures user engagement and viewing behavior at the video show or property level. Publishers use Video Metrix to demonstrate the value of their video audiences to advertisers and benchmark against competitors, while agencies and advertisers can compare video audiences by publishers, category and demographics to inform video ad planning and buying.

Shareablee, Inc.

Launched in 2013, Shareablee Inc. (http://www.shareablee.com) is the leading authority on audience intelligence, competitive benchmarking and actionable insights for social media. The official social media analytics partner of comScore, Shareablee measures a census of global properties and collects brand audience and engagement data across Facebook, Twitter, Instagram, Google+, Tumblr, LinkedIn, YouTube and Pinterest.

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