gumgum + **Brand INNOVATORS**

THE RISE OF THE VISUAL WEB. AND WHY IT'S CHANGING EVERYTHING (AGAIN) FOR MARKETERS

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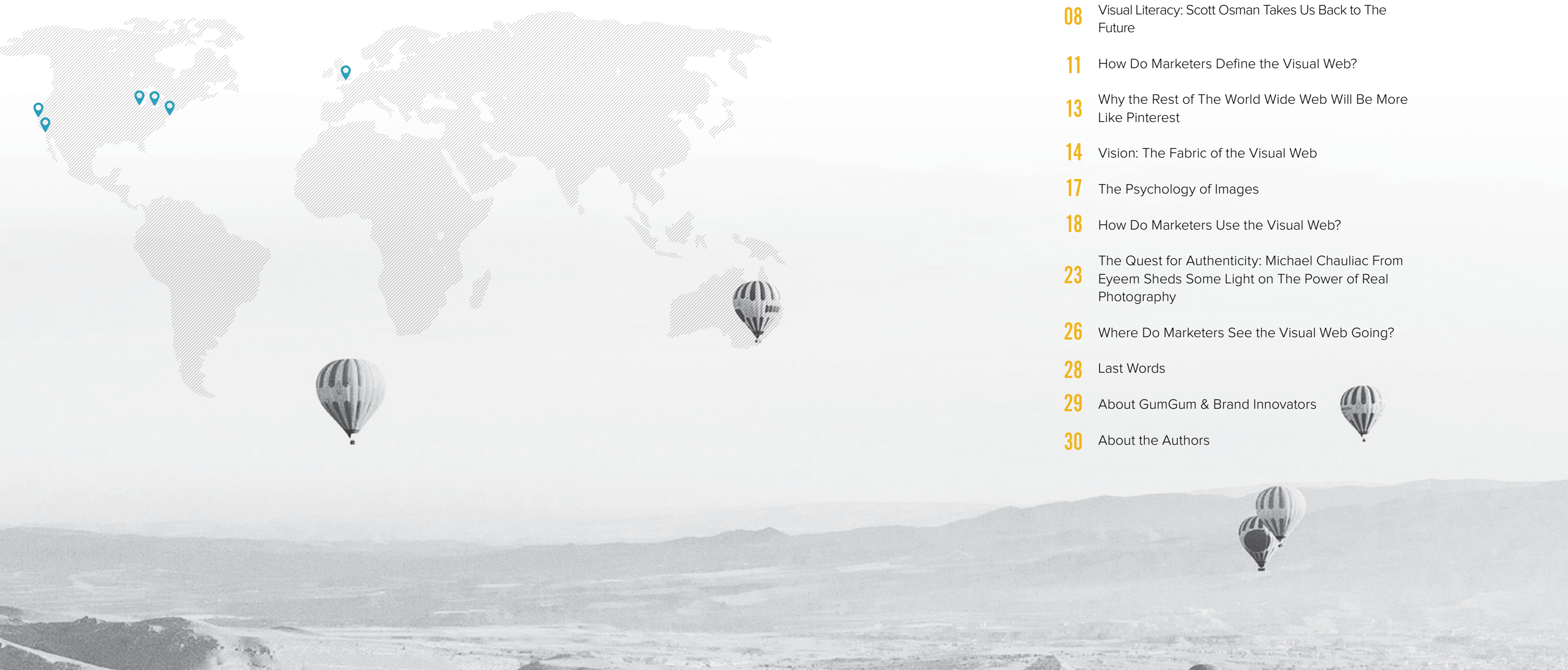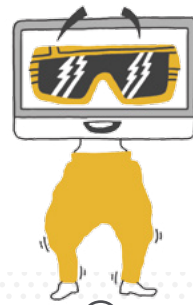| SANTA MONICA	NEW YORK	CHICAGO	DETROIT	SAN FRANCISCO	LONDON
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What You Really Need To Know About
THE VISUAL WEB IN 7 IMAGES

Only got a few minutes to consume something as massive as the visual web? You're in the right place! Here's what you need to know about our GumGum & Brand Innovators' study in a form you can digest faster than you can share a selfie with your BFF.

01

The visual web is no fad, two billion images are uploaded and shared daily.

02

MIT researchers say it takes the human eye just 13 milliseconds to process an image. It takes 100 milliseconds for your eye to blink.

03

The visual web is a social media phenomenon derived from cameras on smart-phones, and the rise of photo-sharing sites such as Pinterest and Instagram.
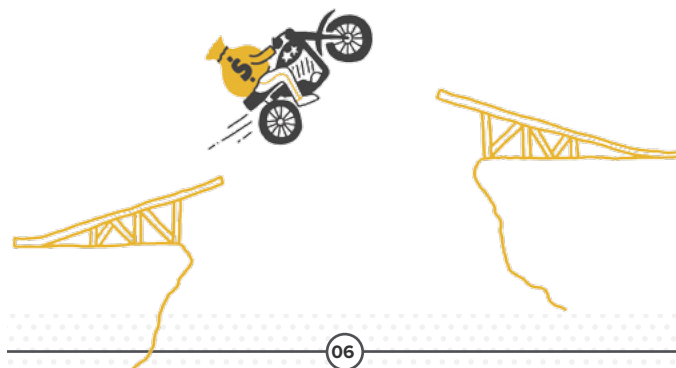
04

88% of respondents said sight is the most important of the five senses when it comes to marketing.
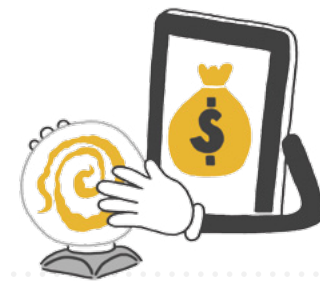
05

84% of marketers said further advancements in image-recognition technology are needed to unlock the full marketing potential of the visual web.

06

There is a significant gap between the importance of the visual web to marketers and the percent of their budget that's allocated to it.
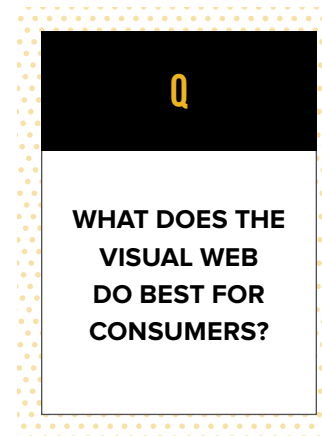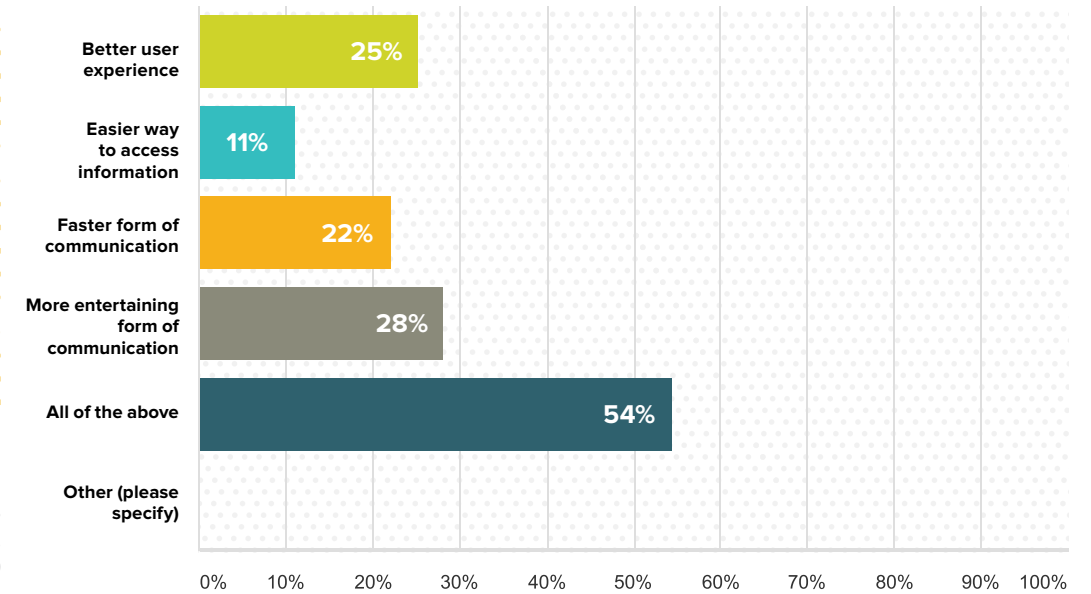
07

Thinking ahead, the majority of marketers expect to spend more in visual storytelling and social platforms.

02

The Visual Web Is Here And Consumers Love It.
ARE YOU READY?

Q

WHAT DOES THE VISUAL WEB DO BEST FOR CONSUMERS?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)

Answer	Percentage
Better user experience	25%
Easier way to access information	11%
Faster form of communication	22%
More entertaining form of communication	28%
All of the above	54%
Other (please specify)	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

In 1911, acclaimed journalist Arthur Brisbane summed up the impact of photography on journalism by citing a Chinese proverb, "A picture is worth a thousand words." That observation is now accepted as Gospel truth since we all have the ability to glean a tremendous amount of information from a single, cursory glance of a photo. In fact, the sentiment carries more weight than ever in 21st century marketing.

In today's digital environment, images speak much louder than words.

From the ubiquity of broadband and smartphone usage, the explosion of out of home digital media, to image-centric social media platforms, celebrity photo galleries and meme generators, consumers both receive and communicate via images at unprecedented rates. Everyone is a photographer, and we amplify our visual communications through myriad social sharing.

EVERYDAY WE'RE TOLD THE VISUAL WEB IS ALL AROUND US. BUT WHAT DOES THAT MEAN?

And how does that affect our daily lives?

Visual web is used to describe everything from the rise of social platforms like Instagram and Twitter, to visual search on Google, video sharing via Snapchat and visual dating apps like Tinder. The term was first popularized in 2013, when photo-centric trends emerged: Facebook acquired Instagram, Pinterest received a multi-billion-dollar valuation, and selfies and memes gained in popularity.

Yet, despite a general familiarity of the term, until now no one has attempted to define the visual web, or to better understand its role in modern-day consumer marketing. This guide seeks to do both of those things by providing an overview of the visual web, and assessing the impact an image-centric culture on marketing and advertising.

In partnership with Brand Innovators, we went directly to brands to see how they view the visual web (no pun intended), its impact on consumers, and the ways in which they expect it to transform the way they market, both today and in the years ahead.

We surveyed 213 active members of the Brand Innovators community between August 14 and September 2, 2015.
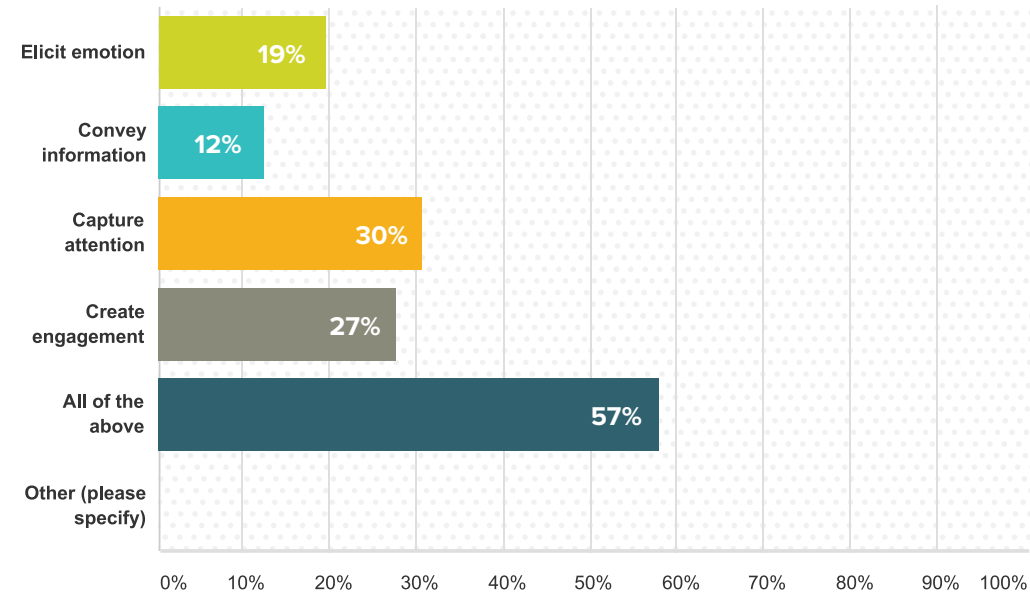
WHAT'S IN IT FOR CONSUMERS?

The majority (54%) of brand marketers we asked said the visual web delivers multiple benefits to consumers, including a better user experience, an easier way to access information, and a faster, more entertaining means of communication.

THE VISUAL WEB CREATES OPPORTUNITIES TO CAPTURE ATTENTION, CREATE ENGAGEMENT, ELICIT EMOTION AND CONVEY INFORMATION.

Q

WHAT DOES THE VISUAL WEB DO BEST FOR MARKETERS?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US Multiple choice question, percentages do not add to 100%)

Elicit emotion	19%
Convey information	12%
Capture attention	30%
Create engagement	27%
All of the above	57%
Other (please specify)	

03 Survey Background
AND DEMOGRAPHICS

The research findings contained in this guide are based on survey responses from 213 active members of the Brand Innovators community between August 14 and September 3, 2015. All of the participants work in brand marketing organizations across an evenly-dispersed range of industry categories. Most (82%) are at a manager or director level in the digital marketing or marketing/communications departments of their companies, and a majority (44%) have worked in the marketing field for more than 10 years.

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

WHAT IS YOUR JOB FUNCTION?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

WHAT IS YOUR JOB TITLE?

Coordinator/Admin	5%
Manager	35%
Director	35%
Vice President	7%
Executive/C-Level	5%
Other (please specify)	13%

Administrative	1%
Brand management	20%
Creative Services	2%
Digital Marketing	26%
Executive Management	8%
Market Research	4%
Marketing/Communications	32%
Media Buying/Planning	1%
Product Management	6%

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

IN WHICH INDUSTRY DO YOU WORK?

Our research documents how these marketers incorporate visual elements into their campaigns, and provides insight into how they anticipate leveraging the visual web over the next 18 months. Our intent is to remove any ambiguity about what the visual web is, and to stimulate an industry dialogue based on data and opinions of the people closest to the category: brand marketers.

"OF ALL OF OUR INVENTIONS FOR MASS COMMUNICATION, PICTURES STILL SPEAK THE MOST UNIVERSALLY UNDERSTOOD LANGUAGE."

- Walt Disney

Industry	%
Automotive	1%
CPG	14%
Education	1%
Entertainment/Sports	2%
Financial Services	17%
Government	1%
Health/Pharmaceutical	6%
Manufacturing	5%
Professional Services	4%
Publishing Broadcasting	1%
Retail/E-Commerce	21%
Travel	1%
Other	1%
Other (please specify)	25%

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

HOW MANY YEARS HAVE YOU WORKED IN THE MARKETING FIELD?
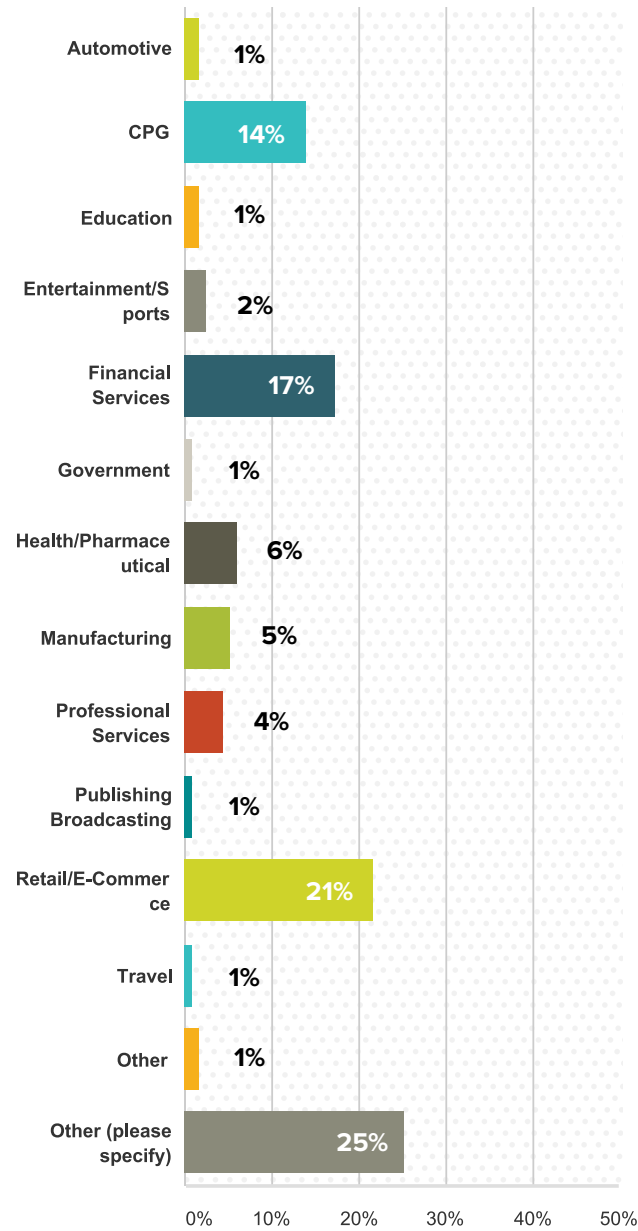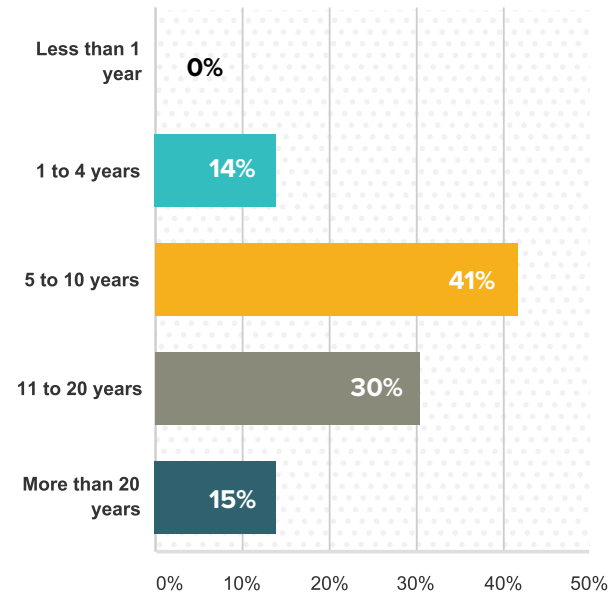
Years	%
Less than 1 year	0%
1 to 4 years	14%
5 to 10 years	41%
11 to 20 years	30%
More than 20 years	15%

04 A Brief History
OF IMAGES

This cave art, dating back 40,000 years, is the oldest hand stencil known to the world.

In 1519 Leonardo Da Vinci contributed one of the most famous images known to the world today, Mona Lisa.

The first photograph in the world, "View from the Window at Le Gras", was taken In 1826 by French scientist Joseph Niépce by a camera obscura.

Soon came the first Kodak camera in 1888, the first 35mm camera in 1913.

After the arrival of the first digital camera in 1975, cameras were segmented towards different consumers: Disposable for travelers, digital for simplified access and unlimited features for the professional.

With the demand for photographs, came the manufacturer's pursuit of task unification. Samsung released the first camera phone in June 2000.

In early 2013, the term 'selfie' started to take off – a photograph that one has taken of oneself. Smartphone manufacturers exploited this trend by introducing front facing phone cameras.

2015 has brought the concept of virtual reality - computer simulated images - to multiple industries. From the Oculus Rift to the Samsung VR Gear, companies are trying to make this experience mainstream today.

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The earliest known visual communication is cave paintings that date back to 40,000 years ago. Archeologists believe that in 9,000 BC (more or less), pictograms were used to represent human experiences. Four thousand years later, ideograms emerged, pictures that represent ideas, and which ultimately gave rise to Egyptian hieroglyphics, Chinese characters and eventually the modern alphabetic languages we're familiar with today.

During the middle ages, people began creating illuminated manuscripts, in which text is supplemented with illustration or decorative initials and borders. (Even as Guttenberg introduced the printing press in the mid-1400s, graphic reproduction was mostly limited to the lines and grids of text.) Then, in 1796 Alois Senefelder invented lithography, a method for printing with stone plates. Originally, Senefelder's goal was to reproduce musical notation, but people soon learned the technique could be used to produce all sorts of images. The technology transformed advertising.

> **"AS NEWSPAPER PENETRATION FALLS, COMPETITORS CUT INTO NEWSPAPER AD SHARE AND THE CULTURE ITSELF MOVES FROM TEXTUAL LITERACY TO VISUAL LITERACY."**
>
> - **Charles Brumback,** Newspaper Association of America

Though lithography was transformative, it couldn't hold a candle to Nicéphore Niépce 1826 invention: photography. The first photographic images were made on pewter plates and required an eight-hour exposure in bright sunshine (a process Louis Daguerre streamlined in 1839, with his Daguerreotype). Then in I884, George Eastman developed film to replace plates, and in 1888 his first Kodak camera went on the market with the slogan "You press the button, we do the rest."

Photographic processes remained relatively unchanged until 1975, when Kodak engineer Steven Sasson invented the digital camera, though the new camera would need to wait another 20 years to be fully commercialized. During that same period came the desktop publishing and personal computing revolution, including the creation of Photoshop by brothers Thomas and John Noll in 1998.

But it was Tim Berners-Lee's invention of the World Wide Web in 1991 that set in motion the phenomenon that would eventually lead to the visual web. Hypertext markup language (HTML) made publishing and image sharing possible via the global Internet. And make no mistake: the early web was inherently visual, thanks to browsers like Mosaic and Netscape providing a graphical interface. Still, it was a more recent confluence of events that accelerated the ubiquity and acceptance of the visual web.

By 2013, 7 out of 10 people in the US accessed the Internet via broadband, and 44% of Americans did so on their smartphones. Instagram had just been acquired by Facebook for $1 billion, and Pinterest was valued at $5 billion, and a cottage industry was forming around image-related technologies. Suddenly, millions of people were taking more photos, more than any other time in history. And they were sharing them with each other at astounding rates. Meanwhile, a shift from desktop to mobile Internet usage shrunk screen real estate, which in turn, upped the value of images and infographics, which did a better job of grabbing the user's attention.

AND MAKE NO MISTAKE: THE EARLY WEB WAS INHERENTLY VISUAL, THANKS TO BROWSERS LIKE MOSAIC AND NETSCAPE PROVIDING A GRAPHICAL INTERFACE.

05

FURTHER READING | The History Of Visual Communication
bit.ly/1i6i74g

Visual Literacy:

SCOTT OSMAN TAKES US BACK TO THE FUTURE

Scott Osman Director, Strategist at Good Omen, has studied images for a long time, first as a professional photographer, and now as a professor exploring the language of the visuals, and they ways in which enterprises can use them to communicate with consumers. His current gig is with Good Omen, a values-led and practice-driven consultancy.

Q WHAT'S THE ROLE OF VISUAL CONTENT IN WEB BROWSING AND CONTENT?

In the last seven years we've moved quickly to communications based on visual content, driven in large part by the rise of visual applications like Instagram, Pinterest and Snapchat. When you look at the last $50 billion companies to emerge, nine have been based on images. Individuals communicate back and forth about their activities and interests through images. It's a very dynamic and powerful world we're just now starting to explore. We're at the infancy of visual communication.

Q HOW HAS THE VISUAL WEB AFFECTED MARKETING, MEDIA AND CREATIVE STRATEGIES?

It's interesting to consider marketing in general, and the power images have in each new media form. It was revolutionary when newspapers first included images, and when the moving images of television replaced radio. Visuals continually transform communication, so it's not surprising they're doing the same thing for the web. The web itself is a visual transformation of the Internet; first it was text based, followed by HTML1 (Mosaic), which made it possible to add images. Then we got broadband, and with it the ability to put video wherever it's appropriate.

Q HAS THE VISUAL WEB SOLVED ISSUES OR CREATED PROBLEMS?

For marketers, images solve more problems than they create. Images communicate emotion at unprecedented speed; you can look at one and gain a lot of information quickly. It's very hard for text-based mediums to compete with them. Marketing needs to be nimble, and images promote that. We don't have expensive ad campaigns that last for a long time anymore. And increasingly

WHEN YOU LOOK AT THE LAST $50 BILLION COMPANIES TO EMERGE, NINE HAVE BEEN BASED ON IMAGES.

marketers are crowdsourcing videos to professional and semi-professional marketers. It's transformative. It's causing problems for some great opportunities for others. There's a lot of dislocation going on.

Q WHERE DOES THE VISUAL WEB EVOLVE FROM HERE? WHERE MIGHT IT BE GOING?

It's going mobile, which, when you come down to it, is an extension of our eyes. We can now, anywhere anytime, look at a screen voluntarily. I'm curious about its implications on how we market businesses. Soon we'll have the ability geo-locate those images so they're contextually relevant. I've got a friend working on something that will allow advertisers to deliver contextually relevant media

THE WEB ITSELF IS A VISUAL TRANSFORMATION OF THE INTERNET.

(visuals and ads) to mobile devices in shopping malls.

The other point of interest is the decreasing cost of broadband, which was once a barrier to images. Ditto for flat screens and the potential of video billboards. We'll soon have the ability to send more images easily to more places.

Q HOW SHOULD MARKETERS APPROACH THE VISUAL WEB?

On one hand, consumers, especially Millennials, are more resistant to marketing. They get the game, so marketers need to cut through the clutter with more diversity, authenticity and purpose in their messages. More and more people want to do business with good companies, but how do you communicate that? Where do you deliver that message? It used to be they were buried in an annual report or the back of a website, but now those messages are becoming front and center. Visual media is a great way to tell a story and communicate

Q complex messages.
WHAT BRANDS DO VISUAL WELL?

Patagonia does a nice job in creating a 360-degree experience of their brand. Red Bull are masters at using media to build their brand. It comes naturally to GoPro. Going forward, we'll see brands that seem to come out of nowhere thanks to their ability to master visuals. The disparity of quality in visual communication is amazing. I started my career as a photographer, and I'm amazed at how people have grown up with keen visual sense.

Q WHAT IS THE VISUAL LITERACY COURSE YOU'RE WORKING ON BUILDING?

For the last six months I've been developing an idea that ties in with everything we're talking about. We're living in a society that increasingly communicates with images. Last I checked, there were about 2 billion images uploaded every day. Take a step back and you realize that creating and consuming images is a language, one that requires a literacy. We've all learned to read and write, but nobody teaches us how to read, see or create an image. Working with the Tuck School of Business at Dartmouth College we've put together the curriculum for visual literacy. It's geared primarily for the enterprise.

WHAT'S YOUR VISUAL IQ?

Think you've got a great handle of the ins and outs of the visual web? Put your visual IQ to the test.

1. **How many times faster can human brains can process images over words?**
   a. 60,000
   b. 6,000
   c. 600
   d. 60
   e. 6

2. **How many ads will an urban dweller see in a day?**
   a. 1,000
   b. 2,000
   c. 3,000
   d. 4,000
   e. 5,000

3. **In 2013, the average human attention span was:**
   a. Less than 2 minutes
   b. 28 seconds
   c. 20 seconds
   d. 8 seconds
   e. Shorter than a goldfish

4. **How many selfies are taken each day?**
   a. 980 million
   b. 460 million
   c. 93 million
   d. 46 million
   e. Too many to count

5. **Which social media platform is growing at the fastest rate?**
   a. Tumblr
   b. Pinterest
   c. Instagram
   d. MySpace
   e. Twitter

6. **How many images are posted to social media everyday?**
   a. 10 billion
   b. 5 billion
   c. 2 billion
   d. 500 million
   e. 100 million

7. **Who first said, 'A picture is worth a thousand words'?**
   a. Frederick R. Barnard
   b. Ivan S. Turgenev's
   c. Chinese proverb
   d. Arthur Brisbane
   e. The American Journal of Education

8. **Tweets with images are retweeted more often than text-based ones by:**
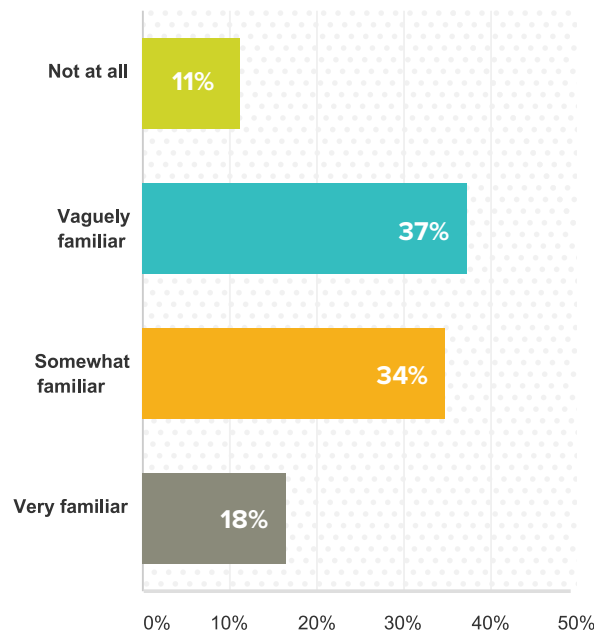   a. 25%
   b. 50%
   c. 100%
   d. 150%
   e. 200%

Source: NYT, Microsoft, Google, Techcrunch, Mary Meeker
Answers on next page

06 How Do Marketers
DEFINE THE VISUAL WEB?

More than half of those surveyed (52%) said they were somewhat familiar or very familiar with the term "visual web," and some (18%) even claimed to understand and have opinions about its meaning. However their definition of it varies greatly.
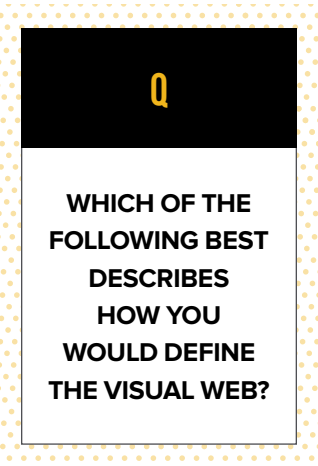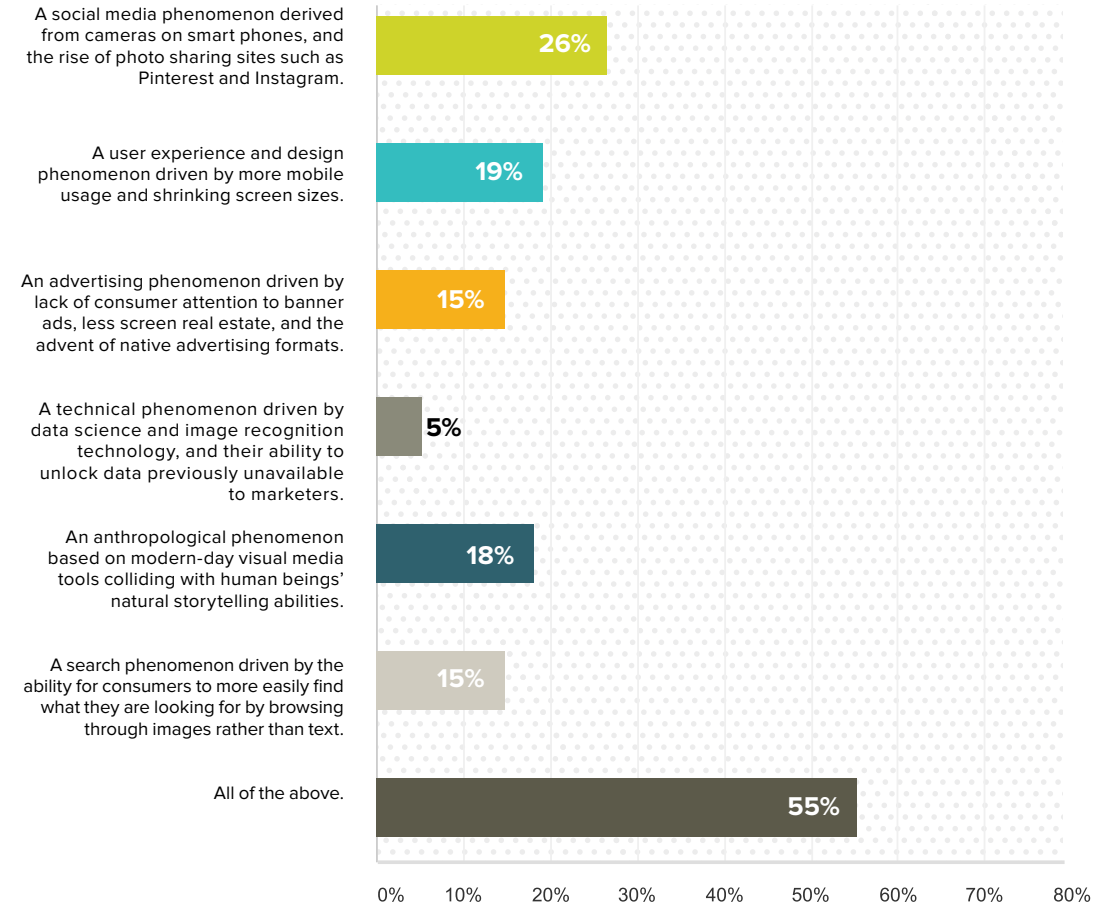
When presented with a variety of definitions for the visual web (e.g. associating it with social media, search, advertising, anthropological or technical underpinnings), more than half (55%) answered "all of the above." Of those who gave a definitive response, the answers were nearly evenly divided, although a slight majority (26%) called the visual web "a social media phenomenon derived from cameras on smart phones, and the rise of photo sharing sites such as Pinterest and Instagram."

A SLIGHT MAJORITY OF MARKETERS CALLED THE VISUAL WEB A SOCIAL MEDIA PHENOMENON DERIVED FROM CAMERAS ON SMART PHONES, AND THE RISE OF PHOTO SHARING SITES SUCH AS PINTEREST AND INSTAGRAM.

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

HOW FAMILIAR ARE YOU WITH THE TERM "VISUAL WEB"?

Familiarity	Percentage
Not at all	11%
Vaguely familiar	37%
Somewhat familiar	34%
Very familiar	18%

When asked to define the visual web using their own words the answers were equally varied. This tag cloud represents the words marketers used most often in their definitions.

appeal attention audience brand changes communicating consumer content convey customers data design device digital driven driving emergence engage evolution experience focused graphics ideas imagery images individual infographics information instagram instead interactive internet language marketing media messages mobile online pages photography photos pictures pinterest platforms product proliferation rise search sharing shift sites snapchat social stimulating story storytelling technology text things think tools trend uploading user video vine visual web website

Q

WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU WOULD DEFINE THE VISUAL WEB?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)

Definition	Percentage
A social media phenomenon derived from cameras on smart phones, and the rise of photo sharing sites such as Pinterest and Instagram.	26%
A user experience and design phenomenon driven by more mobile usage and shrinking screen sizes.	19%
An advertising phenomenon driven by lack of consumer attention to banner ads, less screen real estate, and the advent of native advertising formats.	15%
A technical phenomenon driven by data science and image recognition technology, and their ability to unlock data previously unavailable to marketers.	5%
An anthropological phenomenon based on modern-day visual media tools colliding with human beings' natural storytelling abilities.	18%
A search phenomenon driven by the ability for consumers to more easily find what they are looking for by browsing through images rather than text.	15%
All of the above.	55%

Here are a few sentiments that stood out for us:

"THE VISUAL LANGUAGE OF THE WEB AND HOW IT CHANGES AS DRIVEN BY TECHNOLOGY/ PLATFORMS/FORM FACTORS/ DESIGN AND USER BEHAVIOR."
-Digital Marketing Manager, **Verizon**

"THE EMERGENCE OF PHOTOS AND RICH MEDIA AND SOCIAL MEDIA PLATFORMS IN A SHIFT OF HOW WE CONSUME INFORMATION IN A SHORT ATTENTION SPAN SOCIETY."
-Marketing VP, **Citi**

"WEB CONTENT THAT IS MORE VISUALLY FOCUSED AS OPPOSED TO TEXT BASED."
-Senior Marketing Analyst, **National Grid**

"THE EMERGENCE OF KEY INTERNET PLATFORMS LIKE PINTEREST, SNAPCHAT AND INSTAGRAM THAT HEIGHTEN VISUAL AND MOBILE EXPERIENCE."
-CEO, **Style Island**

"THE RISE IN IMAGE DRIVEN MEDIA ON THE WEB AS A MEANS OF COMMUNICATING, SHARING IDEAS AND CAPTURING ATTENTION."
-Director, **GSK**

"ALL THINGS CONSUMERS SEE ON THE WEB THAT SHAPES THEIR PERCEPTION OF A BRAND OR IDEA."
-Senior Marketing Specialist, **Polaris**

"UTILIZING IMAGERY TO GAIN AUDIENCE ATTENTION AND INTERACTION WITH A BRAND."
-Senior Digital Product Manager, **Cornerstone Brands**

"THE PREVALENCE OF IMAGES AND VIDEO TO CONVEY MESSAGES OVER PREDOMINANTLY TEXT-BASED COMMUNICATION."
-Marketing Strategist, **Walmart.com**

"IMAGE BASED CONTENT."
-SEO Marketing Manager, **Sephora**

"THE PINTERESTIZATION OF THE WORLD WIDE WEB"
-Marketing Manager, **Bluefly**

07

Point of view
WHY THE REST OF THE WORLD WIDE WEB WILL BE MORE LIKE PINTEREST

In our survey results, a senior-level marketing executive remarked how the Internet is quickly becoming 'Pinterestized.' It's a fascinating observation, even if it's a difficult word to pronounce.

Why does this prediction make so much sense to me? As we note throughout this report, consumers respond to and engage with images at higher rates than text. Images instantly capture attention, whereas words bog people down (per the New York Times, images are processed 60,000 times faster than words). And images communicate a wide range of information – emotion, context, distinct points of view – instantly. Our brains are wired to understand these scenarios and process images very efficiently. A person's reaction to an image is instinctive, sometimes even subconscious. Words take longer to process because people have to think about them, which makes them less effective when scrolling through the vast reams of data now available to us on the web.

But here's what Pinterest figured out: Pictures are also inspirational. Not all images, mind you. Images motivate when what they have to offer feels within reach. It's too late for me to be a rock-and-roll star, but I can still buy a guitar, take a few lessons and have fun jamming with my friends. I can't afford a Ferrari, but I can probably swing a Mini Cooper convertible.

Images that set the bar a little higher than where we are today resonate because they offer attainable goals. They give us something to get excited about and evoke a sense of immediate want. Those that set an impossibly high bar aren't as relatable, and therefore don't provoke a reaction as immediate.

When Pinterest set up its platform, it didn't have a social-media model in mind. Its goal wasn't to provide its users with a microphone to broadcast their interests to their friends. The company simply wanted to provide consumers with a place to store all of the ideas, aspirations, and dreams – represented by images – they came across on the Internet for later use. Need to think about what to wear to the upcoming holiday party? Go back to the dress you pinned a few weeks back.

Images are the *Lingua Franca* of Pinterest, and increasingly, the greater web. People now rely on them to perform all sorts of tasks, whether it's organizing the workbench in our basements, or giving the den a low-cost

but effective makeover. The Pinterest feed and other visual mediums act as an important search engine for consumers embarking on an endeavor. It's easier to look at a photo to determine if an approach is what we had in mind (even if we aren't exactly sure what we had in mind) than it is to read a product description.

And here's what Pinterest has taught the world: pictures beget clicks, which in turn beget purchases. According to research by Shopify, consumers that click to a site from Pinterest are 10% more likely to purchase; and a Bizrate Insights survey a few years back reported that, "32% of online buyers in North America have made a purchase as a result of seeing an image on a social image-sharing site, such as Pinterest."

To be sure, advertising has always relied on images for as long as any one of us can remember. Why are the images that are visually webby substantially different from traditional advertising? The difference lies in the ways consumer respond to that. When was the last time you cut out an ad from a magazine? Compare that to the number of times you've pinned something. These types of images encourage interaction, promoting an "active" mindset that makes a customer more willing to make purchasing decisions. Marketers in all sectors are realizing how Pinterest has changed user behavior, and they know they need to catch up. Success in the visual web will be driven by a brand's ability to speak the language of visuals. As a marketer, your immediate challenge is to understand why one image resonates with people and a similar one doesn't. I suspect the answer lies in the point of view. Traditional advertising relies on images that show people whose lives are now wonderful because they possess a particular product, e.g., men who drink a specific spirit are the ones who get the babes. That approach is pretty brand centric: You can't have a wonderful life without us. But guess what? I actually do have a pretty wonderful life, and few people are really impressed by the brand of booze anyone drinks.

Visuals that resonate are steeped in the consumer's point of view and feel more authentic; I see an image of a frosty Manhattan sitting on a kitchen counter and I'm reminded of the days before we got married, when we'd drink Manhattans at our favorite restaurant. It'll be fun to make some tonight as we get dinner on the table, a good way to spice up a Wednesday evening. And that thought motivates me to swing by the spirits store on my way home from work.
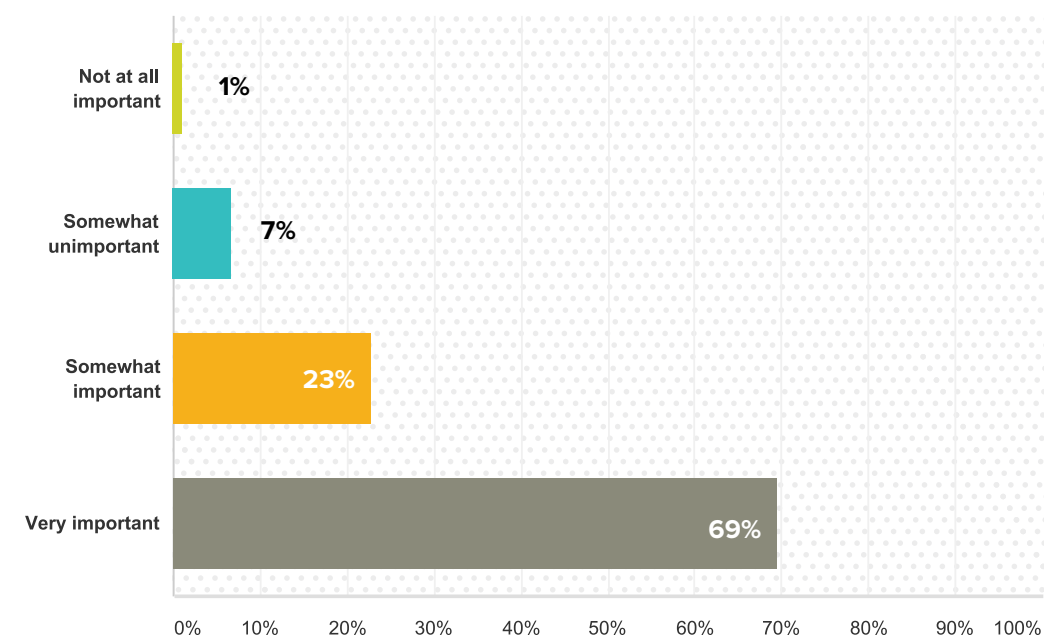

08

Vision
THE FABRIC OF THE VISUAL WEB

Q

HOW IMPORTANT ARE VISUAL ELEMENTS TO THE DAY-TO-DAY MARKETING FUNCTIONS OF YOUR COMPANY?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

- Not at all important — 1%
- Somewhat unimportant — 7%
- Somewhat important — 23%
- Very important — 69%

However it is defined, nearly all marketers say they use some aspect of the visual web in the day-to-day execution of their programs.

BRANDS HOLD THE VISUAL ARTS IN HIGH REGARD

Among our respondents, visual elements are essential to marketing and media plans, which is why 92% of them agreed that visual elements were somewhat important or very important to their delivering their consumer marketing initiatives.

An overwhelming majority of marketers (88%) placed the highest value on the role of sight, when asked which of the human senses are most important when attempting to influence consumer behavior.
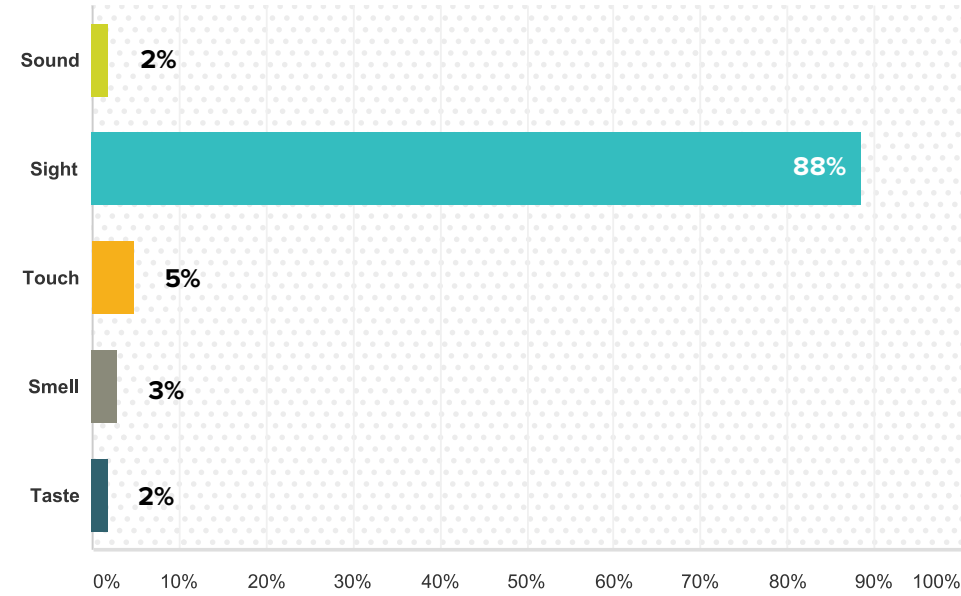
88% OF MARKETERS PLACED THE HIGHEST VALUE ON THE ROLE OF SIGHT, WHEN ASKED WHICH OF THE HUMAN SENSES ARE MOST IMPORTANT WHEN ATTEMPTING TO INFLUENCE CONSUMER BEHAVIOR:

FURTHER READING | Mike Parkinson: The Power of Visual Communication
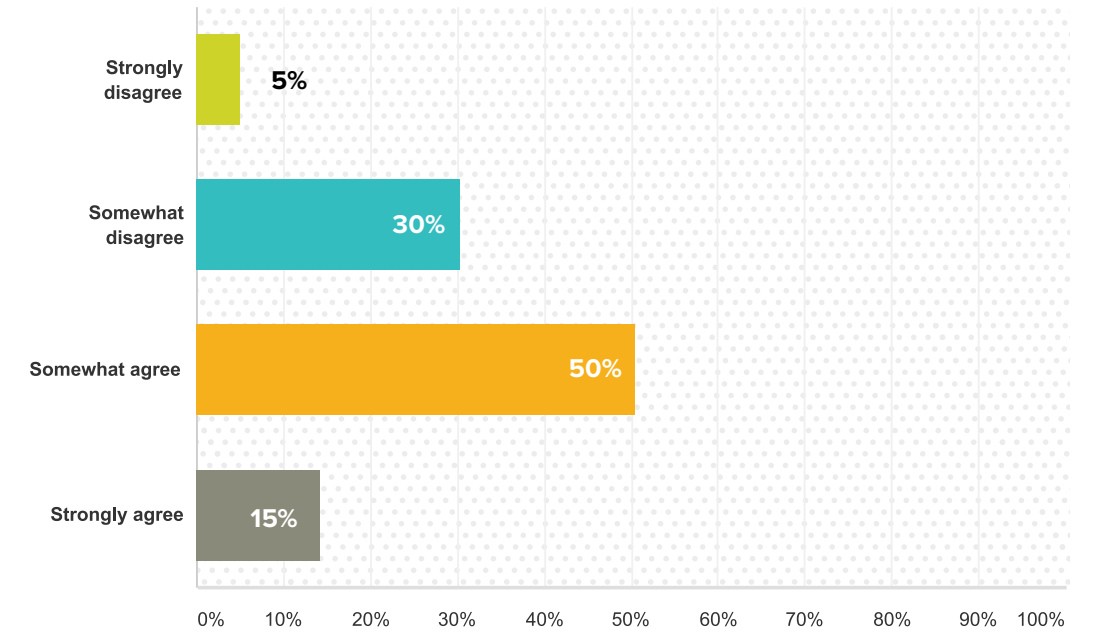bit.ly/1FDRklr

Q

WHEN CONSIDERING HOW TO INFLUENCE CONSUMER BEHAVIOR THROUGH MARKETING, WHICH IS THE MOST IMPORTANT OF THE FIVE HUMAN SENSES?

Sound — 2%
Sight — 88%
Touch — 5%
Smell — 3%
Taste — 2%

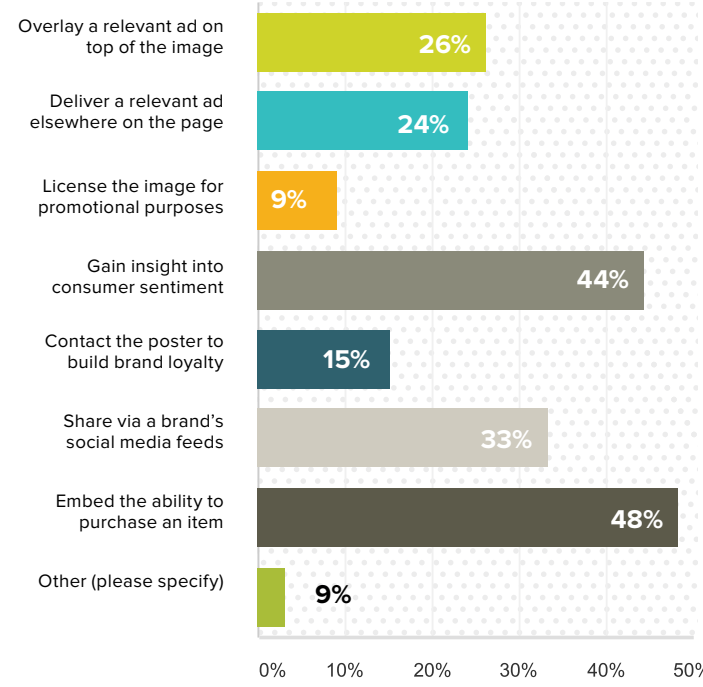Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

USING IMAGES TO INFLUENCE CONSUMER BEHAVIOR

Marketers have a variety of ways to present images to consumers. When asked which strategy creates the most value for them, the majority (48%) said embedding ecommerce capabilities into photos, followed by gaining insight into consumer sentiment based on the images they post (44%). A sizeable group of marketers (33%) place a strong value on consumers sharing images via a brand's social media feeds.

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)

Overlay a relevant ad on top of the image — 26%
Deliver a relevant ad elsewhere on the page — 24%
License the image for promotional purposes — 9%
Gain insight into consumer sentiment — 44%
Contact the poster to build brand loyalty — 15%
Share via a brand's social media feeds — 33%
Embed the ability to purchase an item — 48%
Other (please specify) — 9%

Q

ONCE A USER UNDERSTANDS THE DEEPER MEANING OF AN IMAGE, WHICH OF THE FOLLOWING OPTIONS CREATE THE MOST VALUE FOR MARKETERS?

Q

DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT? RELYING PURELY ON THE TEXT SURROUNDING AN IMAGE OR VIDEO DOES NOT PROVIDE SUFFICIENT INFORMATION FROM WHICH TO FULLY UNDERSTAND ITS CONTENT OR CONTEXT.

Strongly disagree — 5%
Somewhat disagree — 30%
Somewhat agree — 50%
Strongly agree — 15%

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US
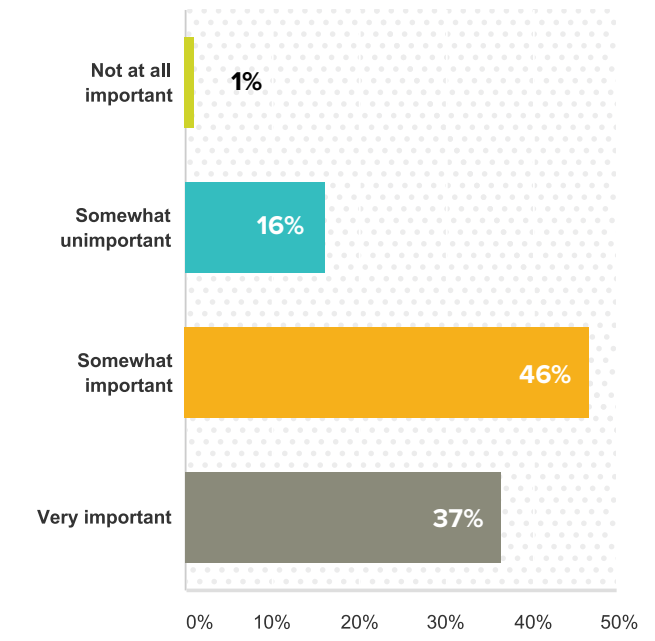
Further, 65% of marketers agreed that adjacent text fails to provide sufficient context for an image or video, and 83% said that advancements in image-recognition technology to help them assess that context is a top priority for unlocking the potential of the visual web.

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Q

HOW IMPORTANT ARE ADVANCEMENTS IN IMAGE-RECOGNITION TECHNOLOGY TO UNLOCKING THE FULL MARKETING POTENTIAL OF THE VISUAL WEB?

Not at all important — 1%
Somewhat unimportant — 16%
Somewhat important — 46%
Very important — 37%

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09 The Psychology
OF IMAGES

10 How Do Marketers
USE THE VISUAL WEB

Human beings communicated visually long before we learned to speak or there was any formal language construct. Even as individuals, we consume the world visually long before we're able to speak or even interpret the words of our parents. So it's not all too surprising to see our modern culture return to the primitive comfort of consuming and communicating via images.

Why are images so powerful? It's simple: the human brain can process them significantly faster and more efficiently than text or audible messages. In fact, MIT researchers now say it takes the human eye just 13 milliseconds to process an image. More importantly, our brains are better equipped to retain information derived from images than through any other form of communication. According to visual literacy expert Dr. Lynell Burmark, "words are processed by our short-term memory where we can only retain about 7 bits of information… images, on the other hand, go directly into long-term memory where they are indelibly etched."

Images increase their power because they have huge affects on the way we feel. Their ability to elicit emotion and to captivate our imagination stimulates the creative areas of our brains, further aiding in a more accurate and thorough understanding of what we see.

The fact that images are processed by our brain faster, retained in memory longer and evoke emotion that can influence our decisions isn't lost on marketers. Since the earliest days of advertising, images served as a powerful tool for influencing consumer behavior.

88% OF MARKETERS PLACED THE HIGHEST VALUE ON THE ROLE OF SIGHT, WHEN ASKED WHICH OF THE HUMAN SENSES ARE MOST IMPORTANT WHEN ATTEMPTING TO INFLUENCE CONSUMER BEHAVIOR:

FURTHER READING

MIT "In the blink of an eye"
bit.ly/1K559NW

Moving beyond their general understanding of the visual web and the importance of the visual arts, we asked marketers more specifically how they put the visual web into practice.

CONTENT: THE BUILDING BLOCKS OF THE VISUAL WEB

When asked to identify the types of visual content they are most likely to use in the coming year, most of the marketers selected custom video (74%) and custom photography (71%) as their visual media of choice, followed by stock photography (62%) and user-generated content (61%). Infographics and illustrations will be used by 57% and 53% of the audience respectively, with user generated video (40%) and stock video (12%) being among the least likely types of visual content to be deployed.
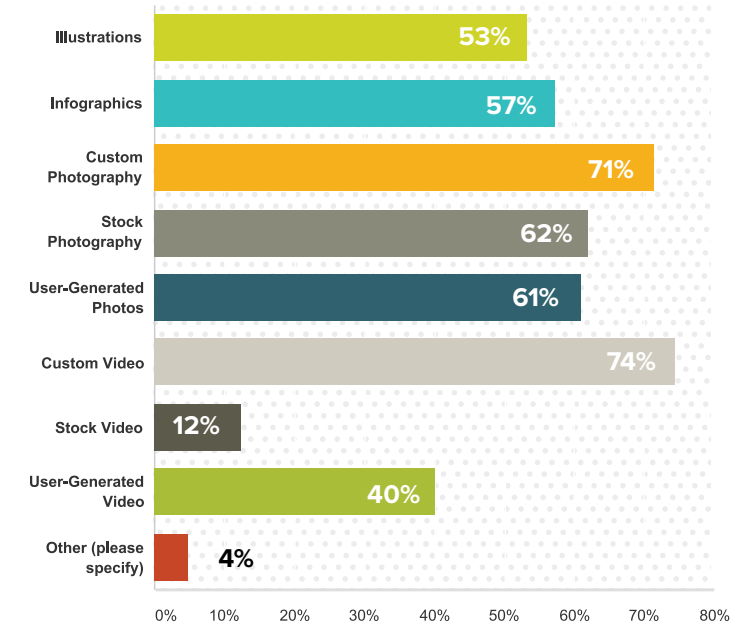
MORE THAN 70% OF MARKETERS SELECTED CUSTOM VIDEO AND CUSTOM PHOTOGRAPHY AS THEIR VISUAL MEDIA OF CHOICE:

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)

Q

WHICH KINDS OF VISUAL CONTENT ARE YOU MOST LIKELY TO APPLY TO YOUR MARKETING PROGRAMS IN THE NEXT 6-12 MONTHS?

Category	Percentage
Illustrations	53%
Infographics	57%
Custom Photography	71%
Stock Photography	62%
User-Generated Photos	61%
Custom Video	74%
Stock Video	12%
User-Generated Video	40%
Other (please specify)	4%

0% 10% 20% 30% 40% 50% 60% 70% 80%

FURTHER READING

Barry, Ann Marie Seward. (1997). Visual Intelligence: Perception, Image and Manipulation in Visual Communication.
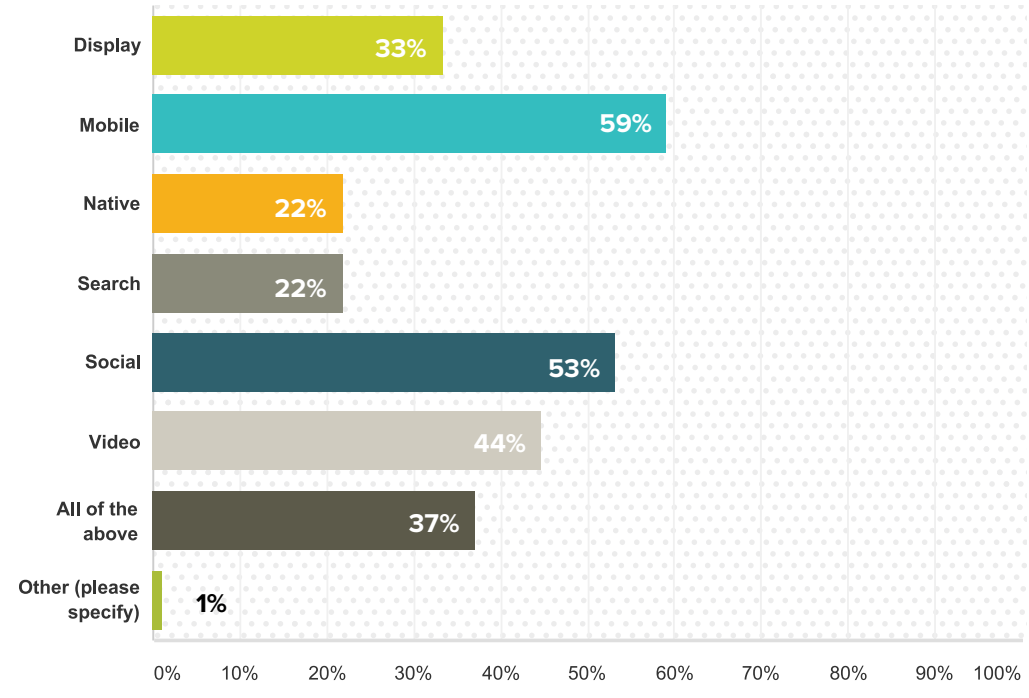New York: State University of New York Press
bit.ly/1EUdcOM

Q

WHICH OF THESE DIGITAL MARKETING CHANNELS IS BEST SUITED TO ACHIEVING BRAND MARKETING OBJECTIVES THROUGH THE USE OF VISUAL MEDIA, SUCH AS IMAGES AND VIDEO?

Channel	%
Display	33%
Mobile	59%
Native	22%
Search	22%
Social	53%
Video	44%
All of the above	37%
Other (please specify)	1%

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)
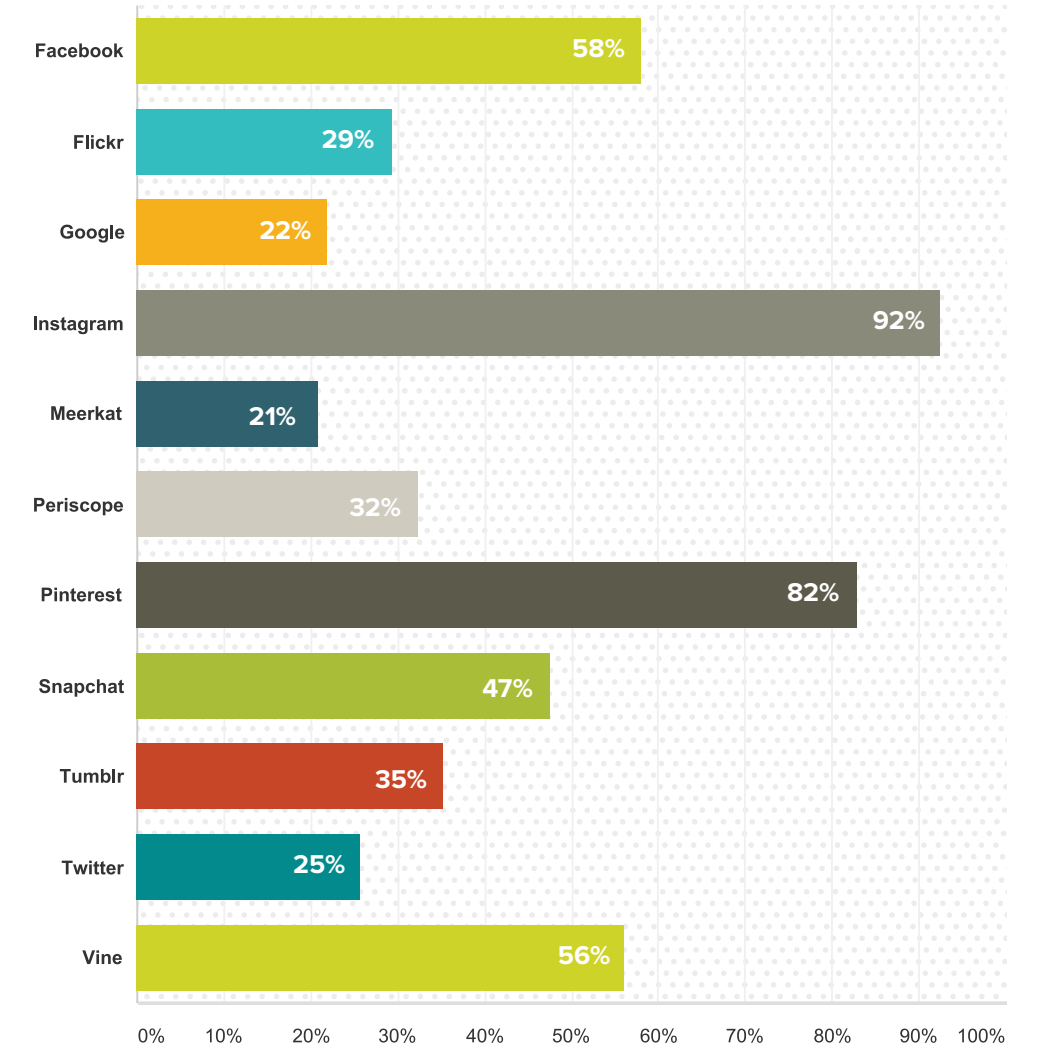
WHICH ARE THE MOST VISUAL CHANNELS

When asked which channels are best for exploiting the properties of the visual web, marketers overwhelmingly said mobile (59%) and social (53%) are the place to express their brands in images, followed by video (44%) and display (33%).

Q

WHICH PLATFORMS DO YOU THINK OF AS MOST CLOSELY ASSOCIATED WITH THE VISUAL WEB? CHECK ALL THAT APPLY.

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US (Multiple choice question, percentages do not add to 100%)

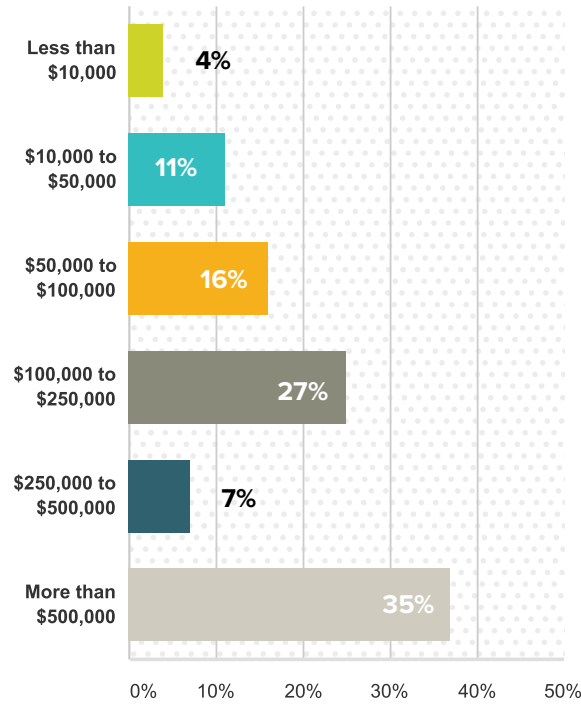| Platform	%
Facebook	58%
Flickr	29%
Google	22%
Instagram	92%
Meerkat	21%
Periscope	32%
Pinterest	82%
Snapchat	47%
Tumblr	35%
Twitter	25%
Vine	56%

WHICH ARE THE MOST VISUAL PLATFORMS?

When asked which of the existing image-oriented platforms are most representative of the visual web, an overwhelming majority named Instagram (92%) and Pinterest (82%), which is consistent with what was reported in the open-ended definitions. Facebook (58%), Vine (56%) and Snapchat (47%) rounded out the top visual platforms selected.

THERE IS A SIGNIFICANT GAP BETWEEN THE IMPORTANCE OF THE VISUAL WEB TO MARKETERS AND THE PERCENT OF THEIR BUDGET THAT'S ALLOCATED TO IT:
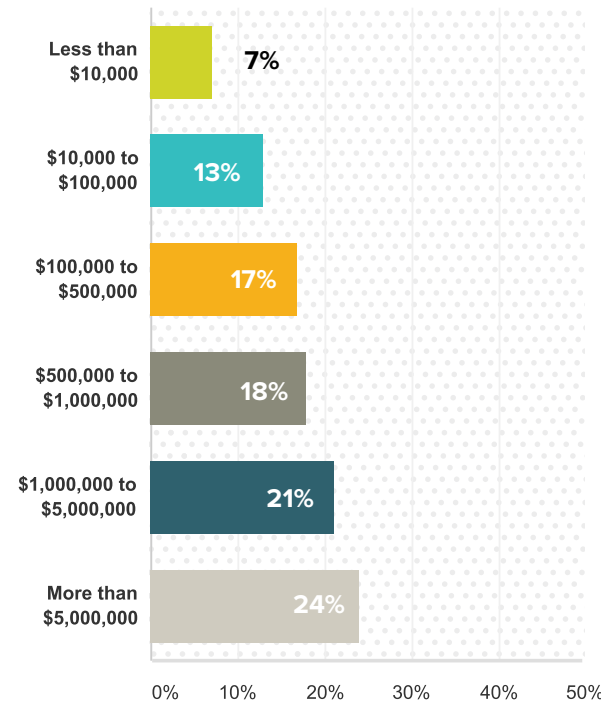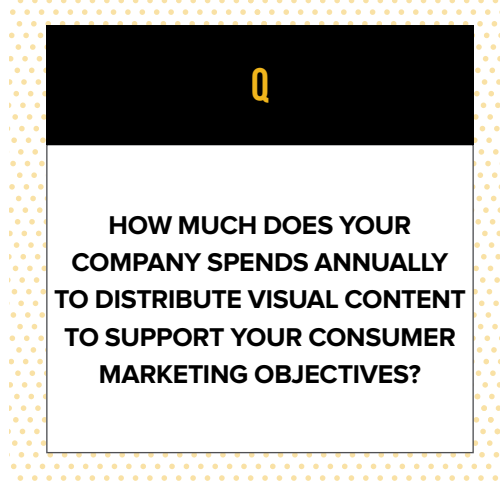
Q

HOW MUCH DOES YOUR COMPANY SPEND ANNUALLY TO CREATE VISUAL CONTENT TO SUPPORT YOUR CONSUMER MARKETING OBJECTIVES?

Range	%
Less than $10,000	4%
$10,000 to $50,000	11%
$50,000 to $100,000	16%
$100,000 to $250,000	27%
$250,000 to $500,000	7%
More than $500,000	35%

Q

HOW MUCH DOES YOUR COMPANY SPENDS ANNUALLY TO DISTRIBUTE VISUAL CONTENT TO SUPPORT YOUR CONSUMER MARKETING OBJECTIVES?

Range	%
Less than $10,000	7%
$10,000 to $100,000	13%
$100,000 to $500,000	17%
$500,000 to $1,000,000	18%
$1,000,000 to $5,000,000	21%
More than $5,000,000	24%

Q

DO YOU ANTICIPATE ANY CHANGES IN THE WAY YOUR COMPANY INVESTS IN THE FOLLOWING VISUALLY-ORIENTED MARKETING TACTICS IN THE NEXT 6-12 MONTHS?

Tactic	%
Image-sharing social...	29%
Image-based native...	23%
Image-based storytelling	35%
Promotional infographics	22%
In-image advertising	21%
In-stream video...	22%
Outstream video...	22%

Q

HOW EASY OR DIFFICULT IS IT FOR MARKETERS TO BUY ADVERTISING MEDIA ACROSS THE VISUAL WEB?

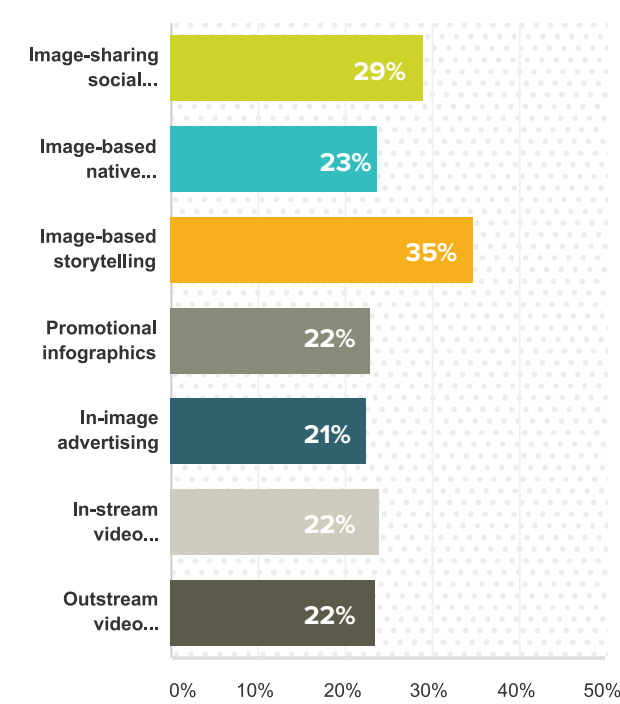| Level	%
Very difficult	3%
Somewhat difficult	49%
Somewhat easy	41%
Very easy	7%

HOW MUCH DO MARKETERS SPEND ON THE VISUAL WEB?

When asked how much their companies invest in the creating content for visual web, the majority of respondents (35%) said they spend over $500K; 27% put the number somewhere between $100K to $250K, and 16% spend between $50K to $100K. Clearly, there is a significant gap between the importance of the visual web to marketers and the percent of their budget that's allocated to it, and that the industry can expect to see steep increases in spending in the coming year to close that deficit in spending.
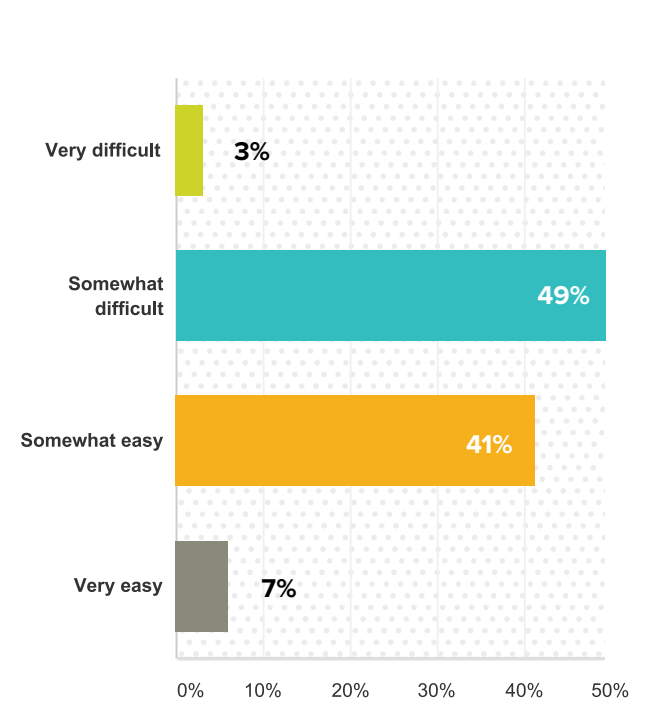
We saw less variance in answers when we asked about their investments to distribute visual content to support their brand. The majority (24%) of marketers said they spend over $5 million annually, and 21% said they spend $1 to $5 million. Only 7% said they spent less than $10K to distribute visual content

When asked how spending on specific tactics pertaining to the visual web will change in the coming year, the highest anticipated increase will be in visual storytelling (35%) and social platforms (29%).

In terms of media buying, marketers were evenly split on how easy or difficult it is to purchase paid media impressions across the visual web. Some 52% said it was very difficult or somewhat difficult, while 48% find it very easy or somewhat easy to do.

11

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The Quest For Authenticity:

MICHAEL CHAULIAC FROM EYEEM SHEDS SOME LIGHT ON THE POWER OF REAL PHOTOGRAPHY

To say Michael Chauliac, CMO at EyeEm, is enthusiastic about photography is an understatement of epic proportions. He heads up marketing for a company on a mission to help photographers of all levels get exposure, recognition and ultimately revenue from their work. Fortunately, the rise of the visual web provides the backdrop he needs to succeed. But it's not just the photographers' interests he's promoting: authentic, real-people photos are the grist that will help marketers connect with consumers in more meaningful ways.

Q THE VISUAL WEB IS ALL AROUND US, AS DEMONSTRATED BY THE RISE OF IMAGES AND VIDEOS. HOW WOULD YOU DESCRIBE THE VISUAL WEB IN YOUR OWN WORDS?

To me the visual web describes the shift of photos and videos (from any and all sources) as the primary medium for how we communicate and consume content today. It also implies the effects of that shift on every player who's on the web (consumers, content creators, brands and publishers, etc.), as well as technology, communications, and art. As with every change there are new winners and new losers, new opportunities and new challenges. The topics and implications are vast!

Q WHAT ARE THE KEY IMPLICATIONS OF THE VISUAL WEB TO MARKETERS

The million dollar image!

Visual web has changed the basic rules of communication and advertising. Text used to be center stage, and images were there to illustrate. Now images drive the message, and they'll make or break a campaign. As marketers, we've all experienced that 'million dollar' image, which is the photo that works all the time, and strikes a chord with every audience. Such images are gold, but sadly short lived. Quickly enough you need a new one. As marketers, we're in constant search for the next great photo, and getting enough of them to test is a challenge.

Also, the threshold for what makes a great photo has increased. Consumers "consume" hundreds of photos a day, getting one that can stop you in your tracks is no small task.

Q HOW IMPORTANT WILL THE VISUAL WEB BE FOR THE FUTURE OF DIGITAL MARKETING CAMPAIGNS?

The visual web is forcing brands to rethink their entire communications and brand strategy, so its implications go beyond digital campaigns. To elicit a response marketers need to change what they say and where they say it. To succeed, they need to entertain rather than sell; emotionally connect with the audience rather than hammer a marketing message. Today, if it looks and feels like an ad, it's considered noise and immediately overlooked. This is why marketing now focuses on native advertising and content marketing. More than ever, marketers and brands need to invest in visual literacy, i.e. the skills needed to understand images and to curate and create meaningful visual campaigns.

Q WHAT CHALLENGE DOES EYEEM SOLVE FOR MARKETERS?

To respond to this, I should explain our company: EyeEm was created for photographers - new and seasoned - to unleash their creativity and get recognized for their talent. We connect over 15 million photographers on iOS and Android, and promote a talented global community through exhibitions, print publications, Meet-Ups, master classes, brand missions, and a recently-launched marketplace for authentic, royalty-free images.

For marketers EyeEm solves two problems. The first is participation over advertising. Through photo missions brands have the opportunity to be the center of the conversation and directly engage with their intended audience at scale.

The second is striking photos. Brands can directly crowdsource in-the-moment photos from the very customers they want to reach. You can license more than 50 million photos directly through our marketplace, and get access to authentic imagery from photographers around the world.

12 Where Do Marketers
SEE THE VISUAL WEB GOING?

Q WHAT TRENDS HAVE YOU OBSERVED WITH STOCK AND CUSTOM PHOTOS RECENTLY?

Due to the heightened role of photos as the primary means of communication, the demand for them – and the immediacy in which they're needed – have increased significantly.

While there's a ton of stock photography, those types of images are less valuable to brands. The staged photo feels off for marketers who want to connect with their audiences on a deeper level. As a result, we see a greater offering of photos that aim for authenticity, and opportunities for brands to directly crowdsource images from pools of photographers.

Q WHAT DOES THE TERM 'REAL PHOTOGRAPHY' MEAN?

The contrary of staged; they're photos that have been taken by real people during real moments. These images often come from amateur and semi-pro photographers who express their creativity in their daily lives through photography.
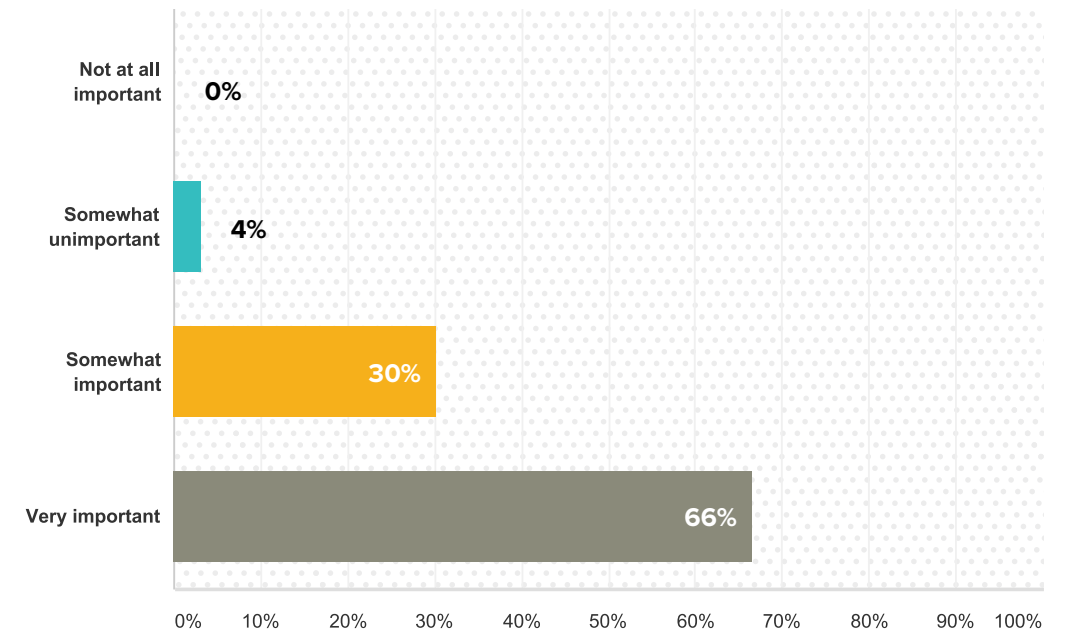
Q

HOW IMPORTANT WILL THE VISUAL WEB BE FOR THE FUTURE OF DIGITAL MARKETING CAMPAIGNS?

Source: GumGum & Brand Innovators, survey of 213 brand marketers in the US

Not at all important	0%
Somewhat unimportant	4%
Somewhat important	30%
Very important	66%

Though still relatively new to brand marketing, the visual web is no fad, as evidenced by the hundreds of hours of video uploaded every minute, and an estimated two billion images uploaded and shared daily.

So what do marketers think of the phenomenon? When we asked about the importance of the visual web for the future of digital marketing, nearly everyone surveyed (96%) said it would be either somewhat important or very important. Not a single respondent suggested it would be entirely unimportant.
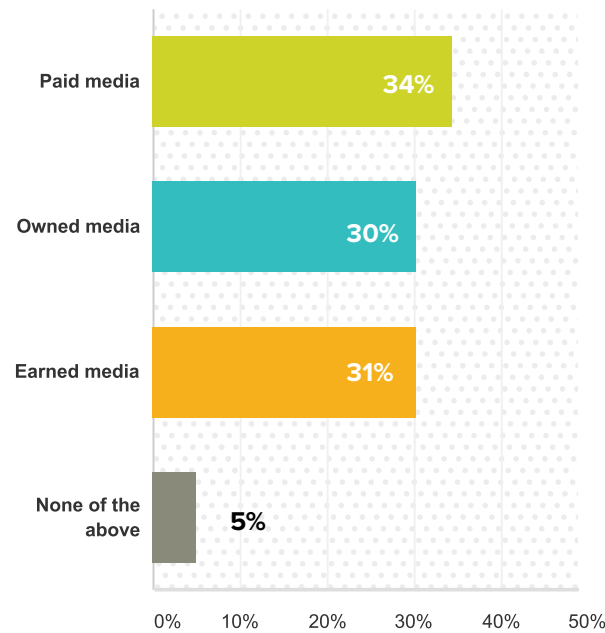
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gumgum

Q

WHERE DO YOU ANTICIPATE THE VISUAL WEB WILL PLAY THE MOST ACTIVE PART IN YOUR MARKETING PROGRAMS OVER THE NEXT 12-18 MONTHS?

"THINK OF THIS AS THE NEXT ITERATION OF LOL, WHERE IMAGES HAVE REPLACED WORDS AS A WAY OF TELEGRAPHING EMOTIONS TO A PRIVATE AUDIENCE."
- Nicola Mendelsohn, Vice President, EMEA, Facebook

Paid media	34%
Owned media	30%
Earned media	31%
None of the above	5%

0% 10% 20% 30% 40% 50%

When asked about the distinction between paid, owned and earned media, marketers were relatively evenly split, with only slightly more (34%) stating their plans for the visual web would be part of a paid strategy, rather than part of their owned (30%) or earned (31%) media efforts.

LAST WORDS

Undeniably, communication in Western culture has become more visual than ever before, made possible by the proliferation of digital cameras and other media creation tools, as well as the ease with which consumers can share images digitally.

As such, marketers and brands must learn how to harness the power of these new channels and disciplines, while a host of media and technology sales professionals are clamoring to demonstrate why their approach is the best way for brands to capitalize on the phenomenon.

The visual web represents everything that uses images in new and creative ways, and inspires consumers to engage with brands based on what they see – both from the brands themselves and from their friends and other trusted sources. Consumers already share their own brand experiences at astounding rates, and not because they have something to gain, but because they have an authentic, brand experience they choose to share visually.

As this study demonstrates, marketers are attuned to the importance of the visual web, and are committed to leveraging a range of paid, owned and earned methods in order to incorporate a visual strategy into their overall marketing mix.

As marketers continue to expand their understanding of the visual web, we believe it's the role of technology providers to help them drive the insights and tools that allow them to fully benefit from the visual web. In the years ahead, we will continue to be astounded and impressed with the ways in which consumers communicate visually – as well as the ways in which marketers will respond in kind. Both the consumer and marketer will have equal roles to play in determining the future of what we now know as the visual web.

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About
GUMGUM

As the inventor of in-image advertising, GumGum is the leading digital marketing platform for the visual web. Our technology unlocks the value of connected images, and delivers highly visible and engaging campaigns for marketers.

Reaching over 400 million visitors as they view images and content across more than 2,000 premium publishers, GumGum ads consistently achieve an 85% viewability rate and deliver 10 times better engagement than traditional display options, resulting in superior brand lift for marketers and increased revenue for publishers.

With GumGum, leading brands from AdAge's top 100 US advertising spenders list, including Disney, L'Oreal and Toyota, can target audiences with contextually relevant content through in-image and in-screen ads, native, video and programmatic options.

GumGum is headquartered in Santa Monica, California, with six additional offices in the US and in the UK. Founded in 2007, GumGum is backed by investors include Morgan Stanley, NEA, Upfront Ventures, First Round Capital and Crosscut Ventures.

About
BRAND INNOVATORS

Founded in 2011, Brand Innovators is the largest professional organization of brand marketers, with a community of over 7,000 marketing professionals from Fortune 500 and other leading brands, throughout the United States and the UK. The Brand Innovators Advisory Board includes some of the most innovative brand marketers and "change agents" in the marketing and media industries.

The company will produce more than 100 events in 2015 in Atlanta, Austin, Bentonville, Boston, Cannes, Chicago, Cincinnati, Columbus, Dallas, Denver, Detroit, Irvine, Las Vegas, London, Los Angeles, Miami, New York, Norwalk, Minneapolis, Portland, San Francisco, Seattle and Washington D.C., providing brand marketers with continuing digital education and intimate peer-to-peer networking opportunities. Events are underwritten by more than 100 "best-of-breed" growth stage and established digital media and advertising technology companies, from Bitly and Outbrain to AOL and Google. For more information, visit www.brand-innovators.com.

About
THE AUTHORS

OPHIR TANZ, CEO
Ophir is the CEO and founder of GumGum and has revolutionized the advertising industry with the creation of the first and largest in-image advertising platform. Prior to launching GumGum in 2007, Ophir was the CEO and co-founder of Mojungle.com, a mobile media-sharing platform that was sold to Shozu.com in 2007. Before this, Ophir co-founded and sold Fluidesign, an award-winning interactive and branding agency.

BEN PLOMION, SVP MARKETING
Ben is the SVP of Marketing at GumGum and brings more than 15 years of experience in marketing communications, as well as business development. Prior to GumGum, Ben was responsible for Chango's brand, integrated marketing and demand generation. His team created one of the most robust thought leadership platforms in the industry and has won multiple marketing and design awards. Prior to joining Chango, Ben worked with GE Capital for four years to establish and lead the digital media practice.

NOTES

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