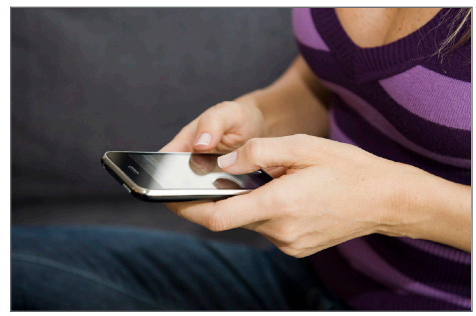
2013 ANA/NIELSEN SURVEY REPORT

Optimizing Integrated Multi-Screen Campaigns

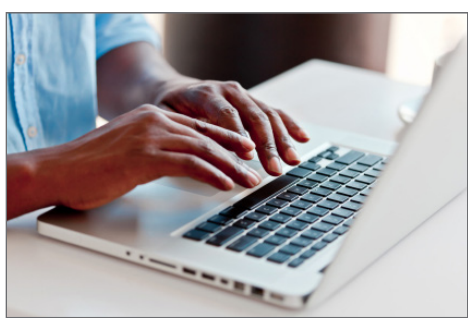
SURVEY RESEARCH

Benchmarks and Trends

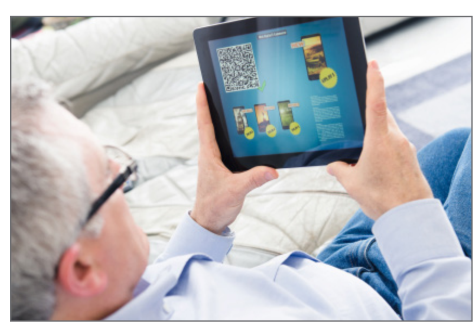










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Executive Summary

SECTION I: CURRENT INDUSTRY BELIEFS AND PRACTICES

Importance/Spend of Integrated Multi-Screen Campaigns Expected to Rise Dramatically

Integrated multi-screen campaigns are important today in effectively delivering a marketing message. However, that importance is expected to be dramatically higher three years from now.

- Today, 48 percent of respondents rate integrated multi-screen campaigns as very important.
- Eighty-eight percent of respondents expect such campaigns to be very important in three years.

All three constituencies in the survey — client-side marketers, agencies, and media sellers — predict dramatic shifts between today and three years from now.

Media spend attributed to integrated multi-screen campaigns is expected to increase as well.

- Today, 20 percent of media spend can be attributed to integrated multi-screen campaigns.
- That is expected to grow to 50 percent by 2016.

Attributes That Will Lead to Increased Spend on Multi-Screen Campaigns

Increased spend on multi-screen campaigns will require:

- Verification that advertising achieved the desired result (noted by 71 percent of respondents)
- Consistent metrics across screens (61 percent)
- Verification that advertising was delivered to the right audience (59 percent)

All three constituents in the survey rate "verification that advertising achieved the desired result" as the attribute most likely to lead to increased spend on multi-screen campaigns.

Managing Integrated Multi-Screen Campaigns

There is an opportunity for better management of integrated multi-screen campaigns, as most organizations (71 percent) are not currently managing them in a fully integrated manner (coordinated management for TV, mobile, digital, etc.). Rather, 19 percent are siloed (separate groups for TV, mobile, digital, etc.) and 52 percent are hybrid (a combination of siloed and integrated).

SECTION II: PERSPECTIVES ON MULTI-SCREEN MEASUREMENT

Metrics for Evaluating Integrated Multi-Screen Campaigns

There is a significant gap between how respondents currently measure and how they would prefer to measure integrated multi-screen campaigns.

- Currently, the large majority (71 percent) use a variety of metrics specific to individual screens.
- Meanwhile, there is overwhelming preference (73 percent) for using one set of metrics across all screens.

Both client-side marketers (79 percent) and media sellers (76 percent) are much more likely to prefer using one set of metrics across all screens as compared with agencies (58 percent).

Characteristics Most Critical for Integrated Multi-Screen Measurement

The characteristics most critical for optimal integrated multi-screen measurement are:

- Consistent methodology across media (73 percent)
- Real-time measures for optimization (69 percent)
- Ability to understand competitive landscape (69 percent)

Both client-side marketers (71 percent) and media sellers (81 percent) rank "consistent methodology across media" the most critical. While agencies are interested (66 percent), they prioritize other metrics, including "real-time measures for optimization" (77 percent).

Importance of Specific Measures in Enabling Media Planning/Buying/Sales for Integrated Multi-Screen Advertising

Brand lift and audience measures are the most important metrics to enable the media planning, buying and/or sales of integrated multi-screen advertising. This was consistent among client-side marketers, agencies, and media sellers. Brand lift measures include awareness, likeability, and purchase intent. Audience measures include reach, frequency, and GRPs.

SECTION III: EXPECTATIONS FOR INDUSTRY EVOLUTION

Screen Types Increasing in Importance: Mobile Phone, Tablet, Connected TV, Digital Place-based

The screen types which respondents feel will be more important in three years as multi-screen advertising vehicles are mobile phones, tablets, connected TVs, and digital place-based media. Meanwhile, traditional TV and PCs/laptops are expected to decline in importance. For traditional TV, those declines are among client-side marketers and agencies, as media sellers expect the importance of traditional TV to hold steady. It is significant to note that the overall decline in the perceived importance of traditional TV (between today and in three years) is more than offset by dramatic increases in the importance of connected TV.

Television and Online Evolution

There was almost universal interest in television adopting a number of online practices, specifically:

- Targeted/addressable advertising
- Behavior-based planning/buying
- Real-time measurement

Meanwhile, there is also interest in online adopting the television practices, particularly:

- Brand lift measures
- Audience measures, such as GRPs

Advertising Formats Considered to Be Best-Suited for Integrated Multi-Screen Advertising

The advertising formats perceived to be best-suited for integrated multi-screen advertising vary by specific screen (television, mobile, tablet, PC/laptop, digital place-based media).

- There is strong interest in video as a platform, across multiple screens, and the opportunity for the use of video to grow.
- There are increased opportunities for branded entertainment and native advertising, as interest in content marketing is on the rise.

Standard television commercials receive mixed messages.

- For client-side marketers, 78 percent currently consider using standard TV commercials, yet only 50 percent believe standard TV commercials are best-suited for integrated multi-screen advertising opportunities.
- Agencies and media sellers are bullish on standard TV commercials.
  - For agencies, 81 percent believe standard TV commercials are best-suited for integrated multi-screen advertising opportunities.
  - For media sellers, 76 percent believe standard TV commercials are best-suited for integrated multi-screen advertising opportunities.

What Keeps the Industry Up At Night?

When asked to identify "the single biggest issue regarding multi-screen advertising that keeps you up at night," measurement, by a wide margin, was the most common response. Also noted was integration, including challenges integrating planning and reporting.

Introduction and Methodology

The Optimizing Integrated Multi-Screen Campaigns survey was conducted online, by ANA and Nielsen, during July and August 2013 among a total respondent sample of 274 people. This sample was comprised of 119 client-side marketers drawn from the membership of the ANA, as well as 80 media sellers and 75 agencies drawn from Nielsen's proprietary database. The respondents surveyed have an average of 17 years of experience in the marketing/advertising industry.

For the purposes of this survey, "integrated multi-screen campaigns" were defined as campaigns that have the same set of marketing objectives and run during a similar timeframe across two or more screens, including TV, computer, tablet, mobile phone, and digital place-based media.

The objectives of this survey included assessing the importance of integrated multi-screen campaigns, evaluating the metrics used to measure their success, examining the attributes that can lead to increased spend on multi-screen campaigns, ascertaining the importance of the different screen types, and determining the ad formats best suited for integrated multi-screen advertising.

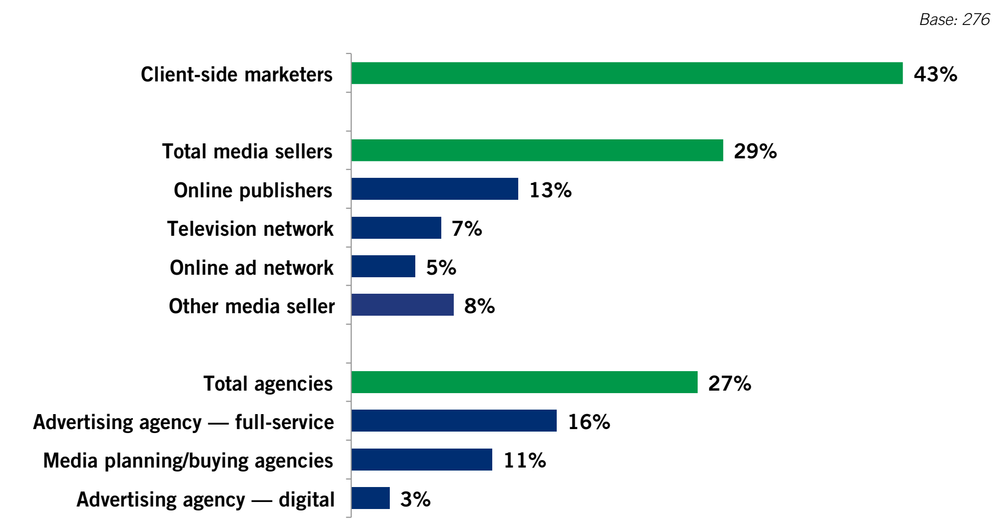
October 2013

About the Respondents

Respondent Profile

Survey respondents were comprised of client-side marketers (43 percent), media sellers (29 percent), and agencies (27 percent). Various different functional areas were represented, including research, strategy, marketing services, media planning/buying, and sales, among others.

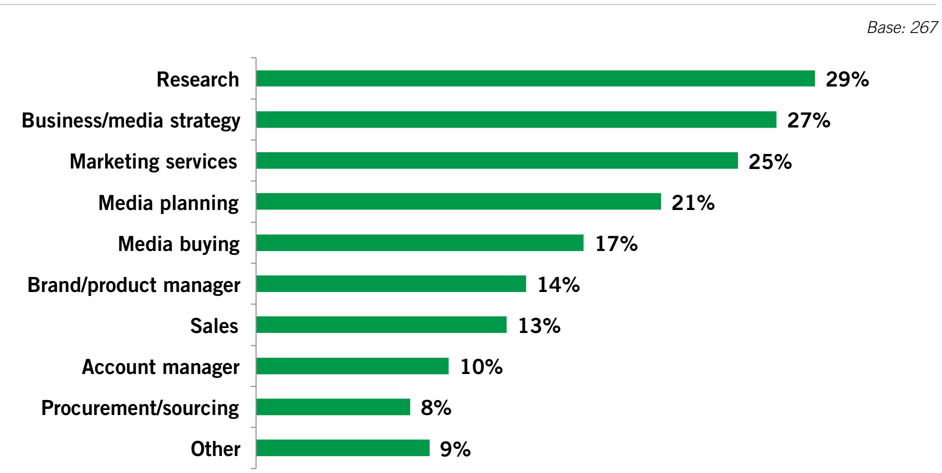
Type of Organization



Q1. Which of the following best describes your organization? Select all that apply.

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Functional Area



Q2. Which of the following best describes your functional area? Select all that apply.

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section I: Current Industry Beliefs and Practices

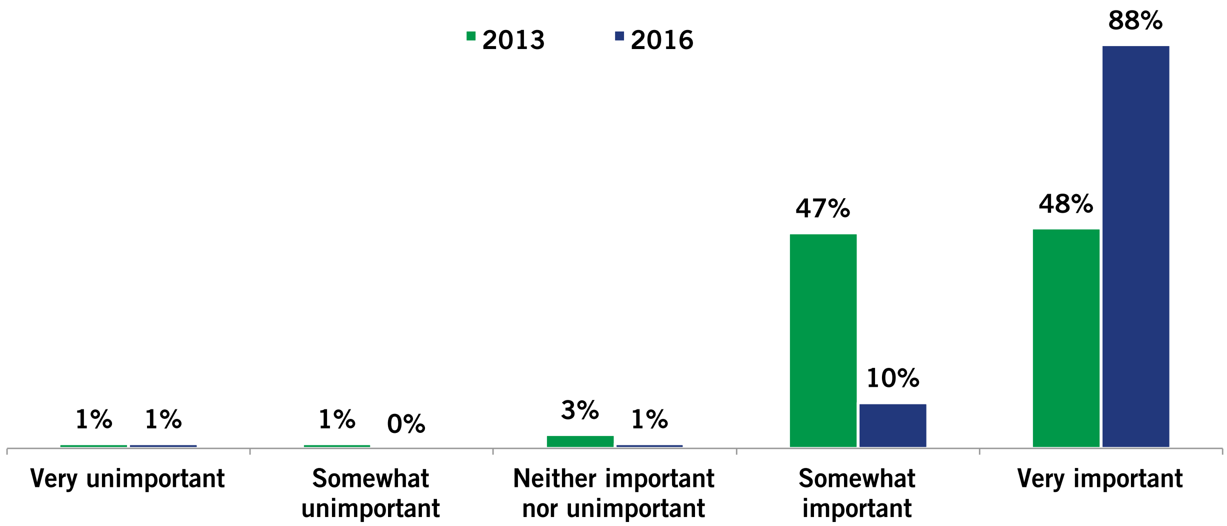
Almost Twice as Many Expect Multi-Screen Campaigns to Be Very Important in Three Years

While integrated multi-screen campaigns are important today in effectively delivering a marketing message, that importance is expected to be dramatically higher three years from now.

- Today, 48 percent of respondents rate integrated multi-screen campaigns as very important.
- Eighty-eight percent of respondents expect such campaigns to be very important in three years.

Importance of Integrated Multi-Screen Campaigns in Delivering Message

Base: 253



Q3. Thinking of ***today*** *and* ***three years*** *from now, please indicate the importance of integrated multi-screen campaigns in effectively delivering a marketing message.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

All Constituencies Predict Dramatic Increases in Integrated Multi-Screen Importance in Three Years

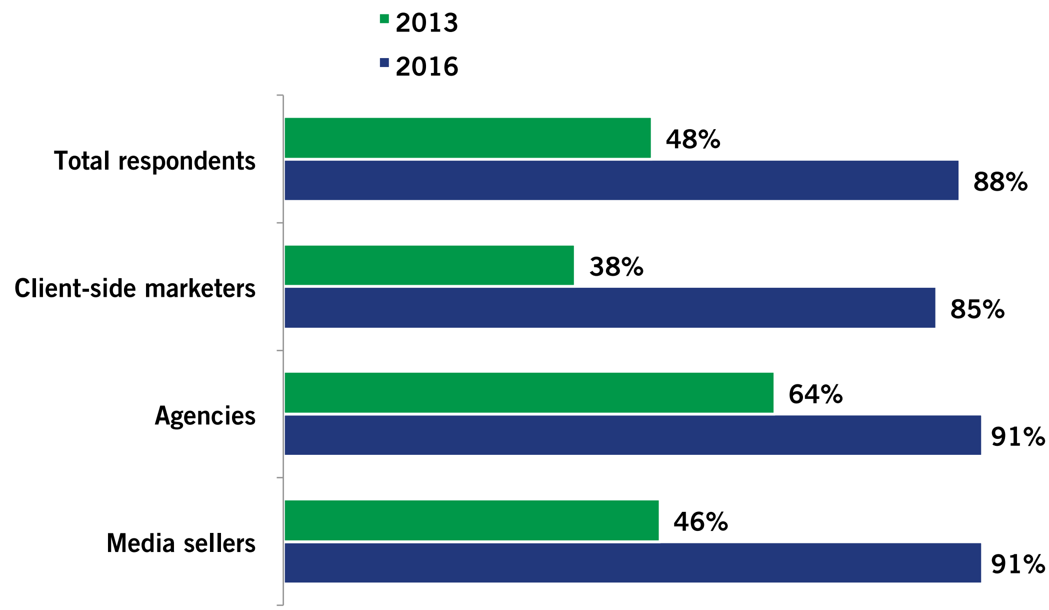
All three constituencies in the survey — client-side marketers, agencies, and media sellers — see dramatic shifts between today and three years from now.

Agencies significantly outpace client-side marketers and media companies in terms of their perception of current importance of integrated multi-screen campaigns.

Importance of Integrated Multi-Screen Campaigns in Delivering Message

(Top Box Ratings on 5-Point Scale [Very Important])

Base: Total = 253; Client-Side = 100; Agencies = 70; Media Sellers = 77



*Q3. Thinking of **today** and **three years** from now, please indicate the importance of integrated multi-screen campaigns in effectively delivering a marketing message.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

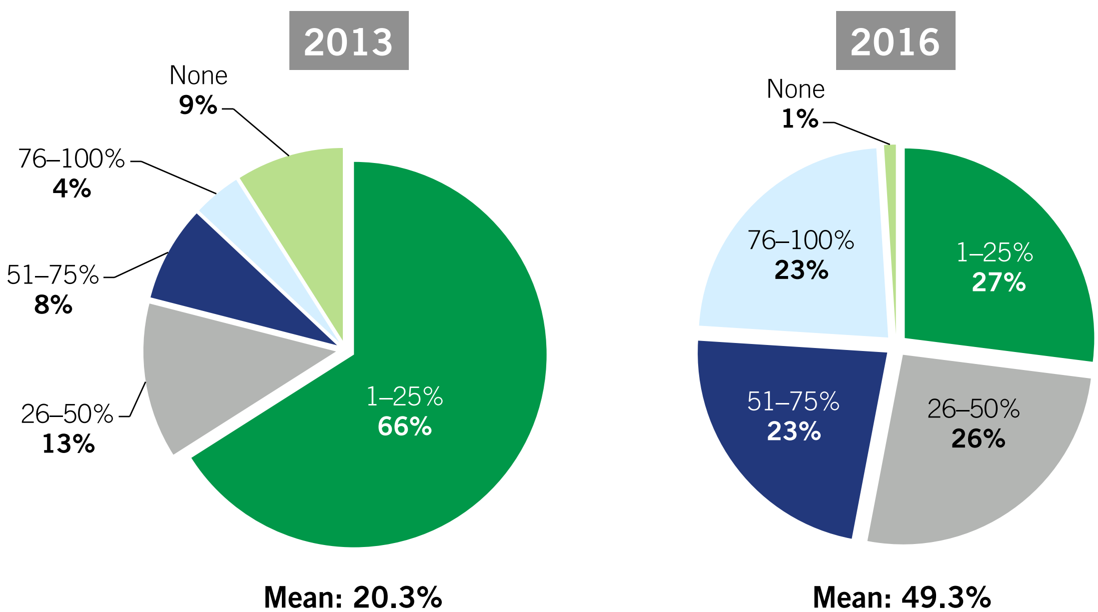
Percentage of Media Spend/Sales from Integrated Multi-Screen Campaigns Are Also Predicted to Increase

Media spend and/or sales attributed to integrated multi-screen campaigns are predicted to increase in three years as well.

- Currently, 12 percent of respondents allocate more than 50 percent of spend/sales. In three years, 46 percent of respondents expect to allocate more than 50 percent of spend/sales.
- Looked at another way, an average of about 20 percent of spend/sales is allocated to integrated multi-screen sales in 2013, and an average of almost 50 percent is expected to be allocated there in three years.

Percentage of Total Media Spend/Sales Attributed to Integrated Multi-Screen Campaigns

Base: 212



*Q4. **Buyers**: In relation to your total media spend, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*
*Q4. **Sellers**: In relation to your total sales revenue, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

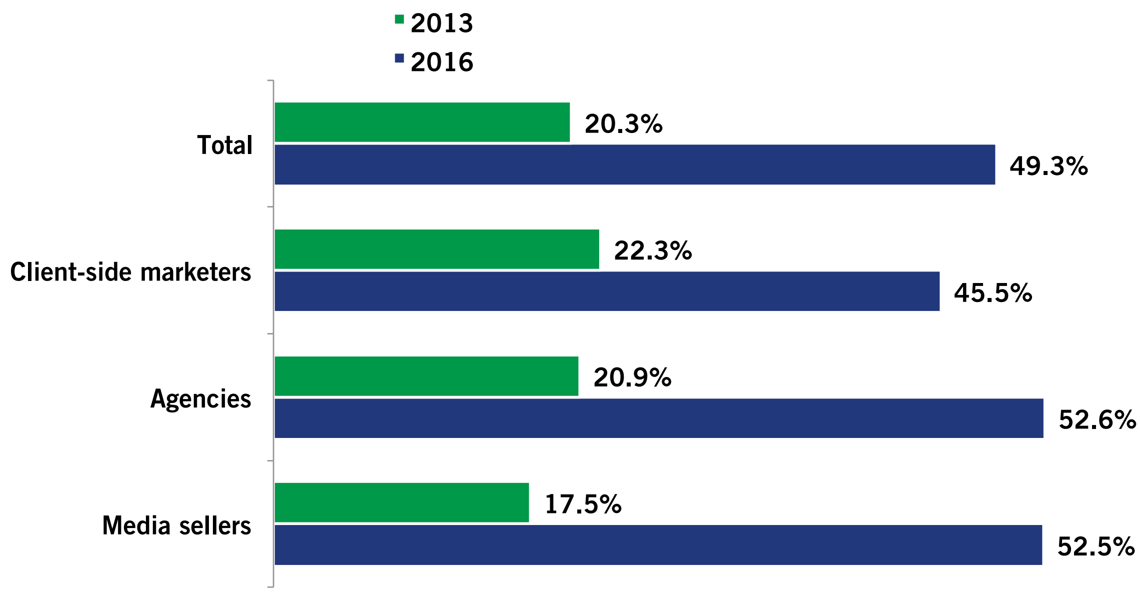
Section I: Current Industry Beliefs and Practices

All Three Constituencies Expect Strong Growth in Spend/Sales Attributed to Multi-Screen Campaigns

There is alignment between client-side marketers, agencies, and media sellers on the growth of spend/sales attributed to multi-screen campaigns.

Average Percentage of Total Media Spend/Sales Attributed to Integrated Multi-Screen Campaigns

Base: Total = 212; Client-Side = 86; Agencies = 55; Media Sellers = 67



*Q4. **Buyers**: In relation to your total media spend, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*
*Q4. **Sellers**: In relation to your total sales revenue, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section I: Current Industry Beliefs and Practices

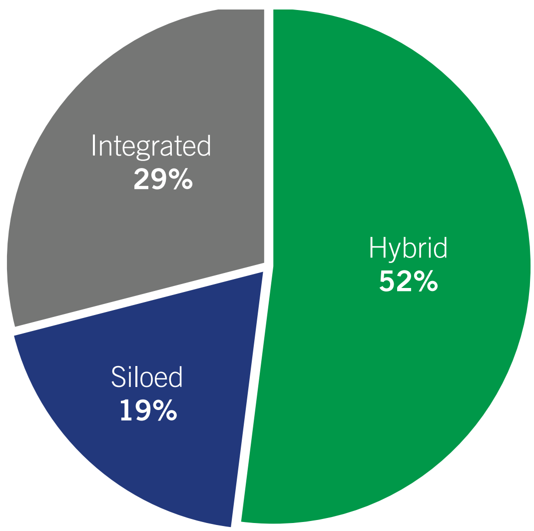
Only About One-Quarter Manage Multi-Screen Campaigns in an Integrated Manner

There is an opportunity for better management of integrated multi-screen campaigns, as most organizations (71 percent) are not currently managing them in a fully integrated manner (the same group for TV, mobile, digital, etc.). Rather, 19 percent are siloed (separate groups for TV, mobile, digital, etc.) and 52 percent are hybrid (a combination of siloed and integrated).

While client-side marketers are more likely to be siloed, there is opportunity across the board for greater integration.

Method of Managing Integrated Multi-Screen Campaigns

Base: 218



Base: Total = 218; Client-Side = 86; Agencies = 61; Media Sellers = 67

	Hybrid	Siloed	Integrated
Total (a)	52%	19%	29%
Client-side marketers (b)	49%	25% c	26%
Agencies (c)	57%	12%	31%
Media sellers (d)	50%	16%	34%

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q5. How does your organization typically manage integrated multi-screen advertising campaigns today?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section I: Current Industry Beliefs and Practices

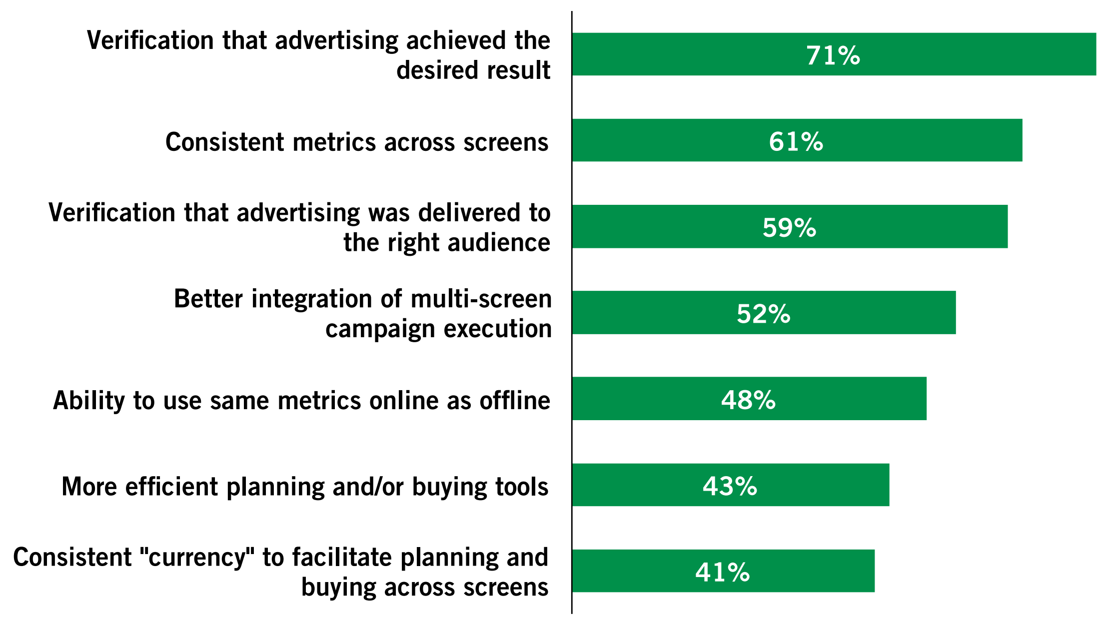
Verification That Ads Achieved Desired Result Is Most Likely to Lead to Increased Spending

The attributes that are most likely to lead to increased spend on integrated multi-screen campaigns are:

- Verification that advertising achieved the desired result (noted by 71 percent of respondents)
- Consistent metrics across screens (61 percent)
- Verification that advertising was delivered to the right audience (59 percent)

Likelihood of Each Attribute to Lead to Increased Spend on Multi-Screen Campaigns
(Top Box Ratings on 5-Point Scale [Very Likely])

Base: 174



Q6. How likely is each of the following to lead you to increase your spending on integrated multi-screen campaigns?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

All Constituencies Rate "Verification That Advertising Achieved Desired Effect" the Highest Attribute

All three constituencies in the survey rate "verification that advertising achieved the desired result" as the attribute most likely to lead to increased spend on multi-screen campaigns.

For client-side marketers, interest is highest in:

1. Verification advertising achieved desired result (66 percent)
2. Consistent metrics across screens (57 percent)
3. Ability to use the same metrics online and offline (57 percent)

Media sellers have higher interest in most attributes versus client-side marketers and agencies.

Likelihood of Each Attribute to Lead to Increased Spend on Multi-Screen Campaigns

(Top Box Ratings on 5-Point Scale [Very Likely]

Base: Total = 174; Client-Side = 74; Agencies = 75; Media Sellers = 48

	Total (a)	Client-Side Marketers (b)	Agencies (c)	Media Sellers (d)
Verification that advertising achieved the desired result	71%	66%	72%	77%
Consistent metrics across screens	61%	57%	55%	76% abc
Verification that advertising was delivered to the right audience	59%	54%	66%	58%
Better integration of multi-screen campaign execution	52%	42%	60% b	60% b
Ability to use same metrics online as offline	48%	57% c	38%	45%
More efficient planning and/or buying tools	43%	33%	53% b	52% b
Consistent "currency" to facilitate planning and buying across screens	41%	29%	39%	58% ab
More efficient production model for finishing creative to use across screens	35%	34%	33%	40%

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q6. How likely is each of the following to lead you to increase your spending on integrated multi-screen campaigns?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section II: Perspectives on Multi-Screen Measurement

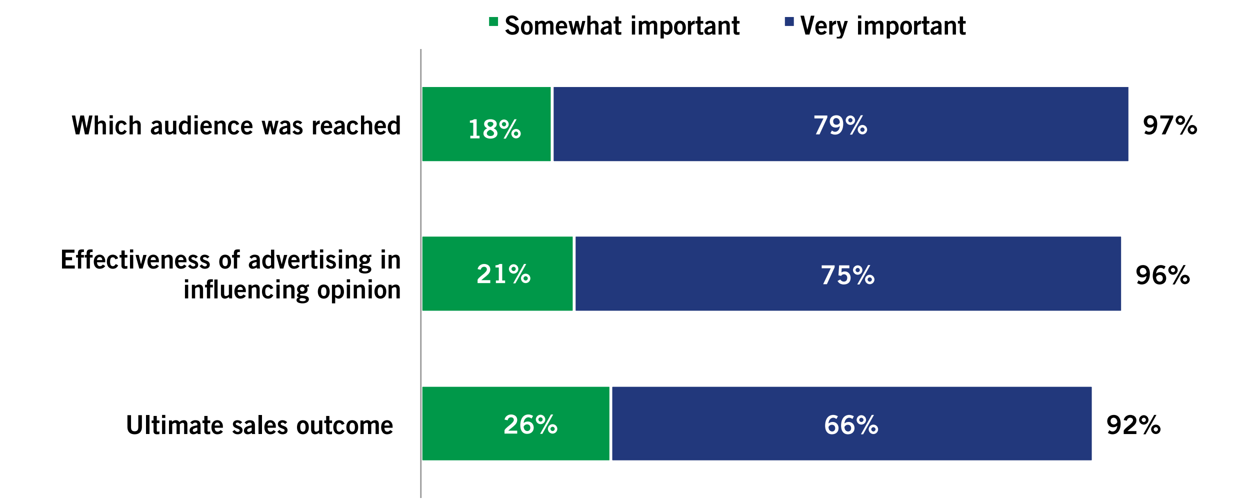
It Is Important to Understand Reach, Resonance, and Reaction of Multi-Screen Campaigns

An understanding of all elements surveyed is important to client-side marketers, agencies, and media sellers. Across all constituencies, reach (i.e., understanding the audience that saw the advertising), resonance (i.e., effectiveness of advertising in influencing opinion), and reaction (i.e., ultimate sales outcome) were widely regarded as very important elements in understanding multi-screen campaigns.

Importance of Understanding Each Element of Multi-Screen Campaign

(Top 2 Box Ratings on 5-Point Scale [Very/Somewhat Important])

Base: 183



Top Box (Very Important)

Base: Total = 183; Client-Side = 73; Agencies = 53; Media Sellers = 55

	Total (a)	Client-Side Marketers (b)	Agencies (c)	Media Sellers (d)
Which audience was reached	79%	75%	83%	84%
Effectiveness of advertising in influencing opinion	75%	66%	83% b	80%
Ultimate sales outcome	66%	63%	69%	69%

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q7. How important is it to understand each of the following for your integrated multi-screen campaigns?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section II: Perspectives on Multi-Screen Measurement

There Is a Significant Gap Between Current and Preferred Methods of Effectiveness Measurement

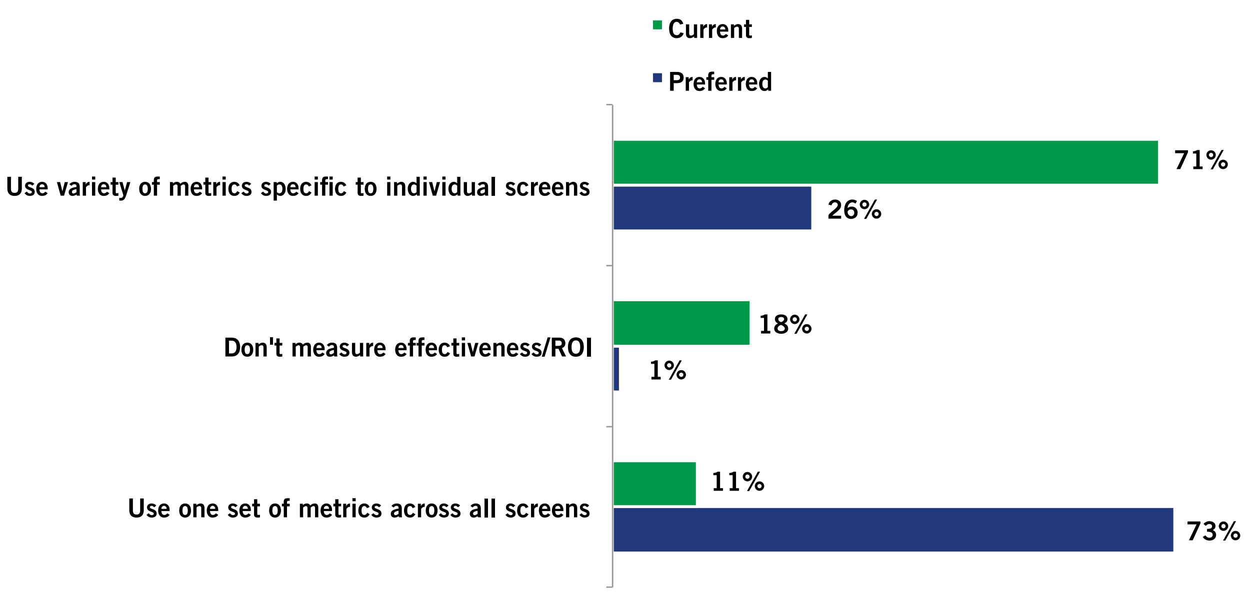
There is a significant gap between how respondents currently measure the effectiveness /ROI of integrated multi-screen campaigns and how they would prefer to measure it.

- Currently, the large majority (71 percent) use a variety of metrics specific to individual screens.
- Meanwhile, there is overwhelming preference (73 percent) for using one set of metrics across all screens.

We followed up with respondents to better understand the 11 percent who currently claim to use one set of metrics across all screens, and learned that marketing mix modeling is the most common metric used by those respondents.

Current/Preferred Measurement of Effectiveness/ROI of Multi-Screen Campaigns

Base: 176



*Q8. How are you **currently** measuring the effectiveness/ROI of your integrated multi-screen campaigns, and how would you **prefer** to measure the effectiveness/ROI of your integrated multi-screen campaigns?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Client-Side Marketers and Media Sellers Prefer to Use One Set of Metrics Across All Screens

Both client-side marketers (79 percent) and media sellers (76 percent) are much more likely to prefer to use one set of metrics across all screens compared with agencies (58 percent).

Client-side marketers have a desire to simplify measurement across screens through the use of one unified metric. The majority of agencies also agree with this, though some agencies would prefer having more metrics to work with.

Current/Preferred Measurement of Effectiveness/ROI of Multi-Screen Campaigns

Base: Total = 176; Client-Side = 71; Agencies = 49; Media Sellers = 54

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Current	Preferred	Current	Preferred	Current	Preferred	Current	Preferred
Use variety of metrics specific to individual screens	71%	26%	70%	21%	76%	42% bd	69%	20%
Don't measure effectiveness/ROI	18%	1%	14%	0%	18%	0%	20%	4%
Use one set of metrics across all screens	11%	73%	16%	79% c	6%	58%	11%	76%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q8. How are you **currently** measuring the effectiveness/ROI of your integrated multi-screen campaigns, and how would you **prefer** to measure the effectiveness/ROI of your integrated multi-screen campaigns?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Consistent Methodology Across Media Is Most Critical Characteristic for Multi-Screen Measurement

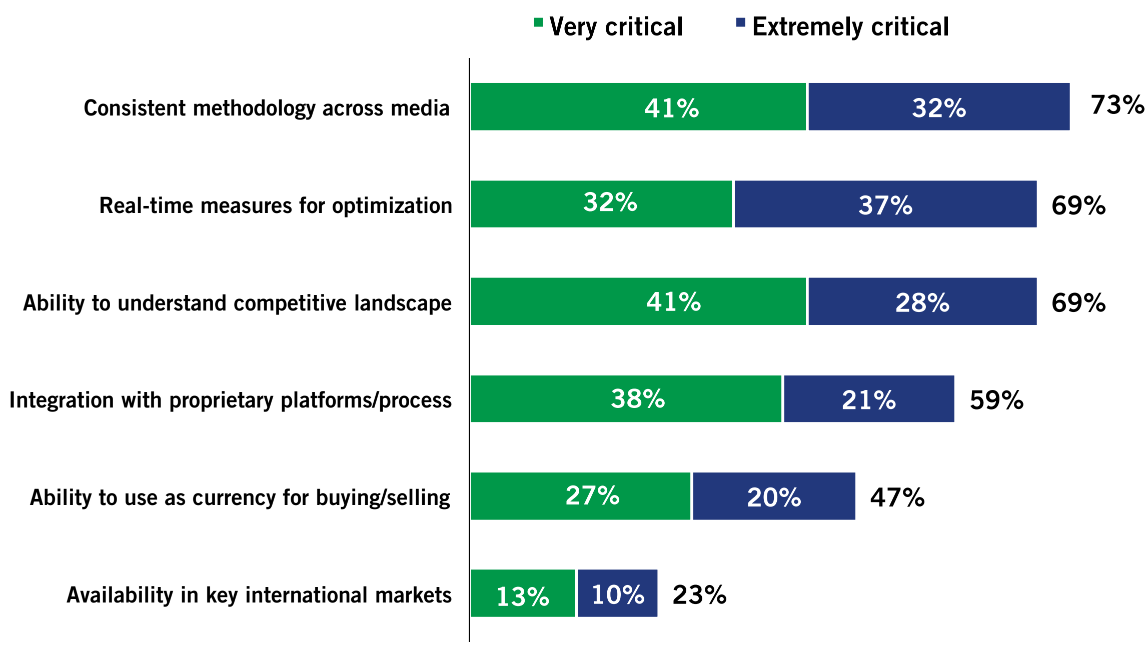
The characteristics most critical for integrated multi-screen measurement are:

- Consistent methodology across media (73 percent)
- Real-time measures for optimization (69 percent)
- Ability to understand competitive landscape (69 percent)

How Critical Characteristics Are for Multi-Screen Measurement

(Top 2 Box Ratings on 5-Point Scale [Extremely/Very Critical])

Base: 166



Q9. Among the benefits listed below, how critical is each to you for integrated multi-screen measurement?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Client-Side Marketers and Media Sellers Rate Consistent Methodology Across Media as Most Critical Characteristic

Both media sellers (81 percent) and client-side marketers (71 percent) rate consistent methodology across media the most critical characteristic for integrated multi-screen measurement. And while agencies have interest here (66 percent), they perceive other metrics as more critical, including real-time measures for optimization (77 percent).

How Critical Characteristics Are for Multi-Screen Measurement

(Top 2 Box Ratings on 5-Point Scale [Extremely/Very Critical])

Base: Total = 166; Client-Side = 69; Agencies = 47; Media Sellers = 48

	Total (a)	Client-Side Marketers (b)	Agencies (c)	Media Sellers (d)
Consistent methodology across media	73%	71%	66%	81%
Real-time measures for optimization	69%	62%	77%	69%
Ability to understand competitive landscape	69%	61%	70%	78% b
Integration with proprietary platforms/process	59%	50%	71% b	62%
Ability to use as currency for buying/selling	47%	40%	43%	60% b
Availability in key international markets	23%	19%	15%	34% c

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q9. Among the benefits listed below, how critical is each for integrated multi-screen measurement?

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section II: Perspectives on Multi-Screen Measurement

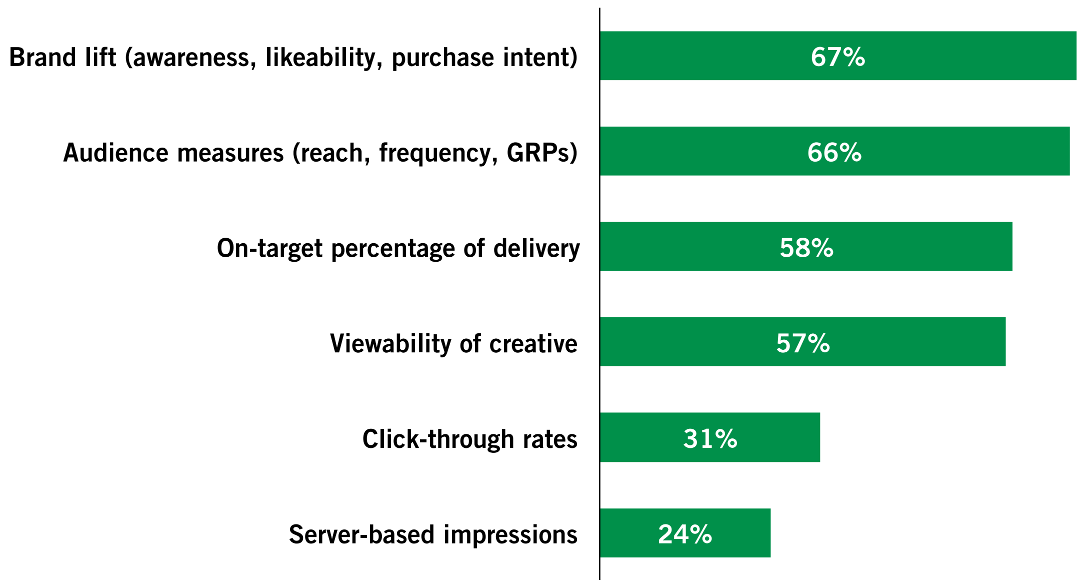
Brand Lift and Audience Measures Are Most Important in Enabling Media Planning/Buying

When asked to rate the importance of specific metrics in enabling the media planning and buying process for integrated multi-screen campaigns, the highest rated were:

- Brand lift measures like awareness, likeability, and purchase intent (67 percent)
- Audience measures like reach, frequency, and GRPs (66 percent)

Importance of Measures in Enabling Media Planning/Buying/Sales Process
(Top 2 Box Ratings on 5-Point Scale [Very/Somewhat Important])

Base: 157



*Q10. **Buyers**: How important are each of the following measures in enabling your **media planning and buying process** for integrated multi-screen advertising?*
*Q10. **Sellers**: How important are each of the following measures in enabling your **sales process** for integrated multi-screen advertising?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section II: Perspectives on Multi-Screen Measurement

Client-Side Marketers Rate Audience Measures as Most Important in Enabling Media Planning/Buying

Audience measures (reach, frequency, and GRPs) were rated the most important to client-side marketers (66 percent) in enabling the media planning and buying process for integrated multi-screen advertising.

Media sellers ranked server-based impressions (43 percent) and click-through rates (37 percent) higher than did the other constituents, as they have and use those measures.

Importance of Measures in Enabling Media Planning/Buying/Sales Process
(Top Box Ratings on 5-Point Scale [Very Important])

Base: Total = 157; Client-Side = 64; Agencies = 43; Media Sellers = 48

	Total (a)	Client-Side Marketers (b)	Agencies (c)	Media Sellers (d)
Brand lift (awareness, likeability, purchase intent)	67%	59%	72%	74%
Audience measures (reach, frequency, GRPs)	66%	66%	72%	61%
On-target percentage of delivery	58%	55%	72% d	51%
Viewability of creative	57%	53%	65%	56%
Click-through rates	31%	30%	26%	37%
Server-based impressions	24% b	11%	23%	43% abc

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q10. **Buyers**: How important are each of the following measures in enabling your **media planning and buying process** for integrated multi-screen advertising?*
*Q10. **Sellers**: How important are each of the following measures in enabling your **sales process** for integrated multi-screen advertising?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section III: Expectations for Industry Evolution

The Large Majority Feels TV Should Adopt Several Online Practices

There is almost universal interest in television adopting a number of online practices. Specifically:

- Targeted/addressable advertising (82 percent)
- Behavior-based planning/buying (74 percent)
- Real-time measurement (74 percent)

Degree to Which Television Should Adopt Online Practices

(Top 2 Box Ratings on 5-Point Scale [Complete Adoption/Great Degree])

Base: Total = 148; Client-Side = 61; Agencies = 43; Media Sellers = 45

	Total	Client-Side Marketers	Agencies	Media Sellers
Targeted/addressable advertising	82%	82%	84%	82%
Behavior-based planning/ buying	74%	74%	77%	71%
Real-time measurement	74%	70%	79%	71%
Reaction/response-based transaction like click-through	45%	49%	39%	44%

*Q12. To what degree do you want **television** to adopt each of the following online practices?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

There Is Also Interest in Online Adopting TV Practices Such as Brand Lift and Audience Measures

Meanwhile, there is interest in online adopting the television practices, particularly:

- Brand lift measures (83 percent)
- Audience measures, such as GRPs (75 percent)

Client-side marketers are significantly more interested in audience measures like GRPs (85 percent) than are agencies (69 percent) or media sellers (67 percent).

All three constituencies would also appreciate less fragmentation around buying/selling.

Degree to Which Online Should Adopt Television Practices

(Top 2 Box Ratings on 5-Point Scale [Complete Adoption/Great Degree])

Base: Total = 149; Client-Side = 61; Agencies = 43; Media Sellers = 45

	Total (a)	Client-Side Marketers (b)	Agencies (c)	Media Sellers (d)
Brand lift measures	83%	79%	93%	80%
Audience measures like GRPs	75%	85% d	69%	67%
Less fragmentation around buying/selling	74%	76%	75%	71%
Upfront buying/selling	49%	51%	36%	56% c

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q13. To what degree do you want **online** to adopt each of the following television practices?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section III: Expectations for Industry Evolution

Tablets and Mobile Phones Are Predicted to Be Most Important Screens in Three Years

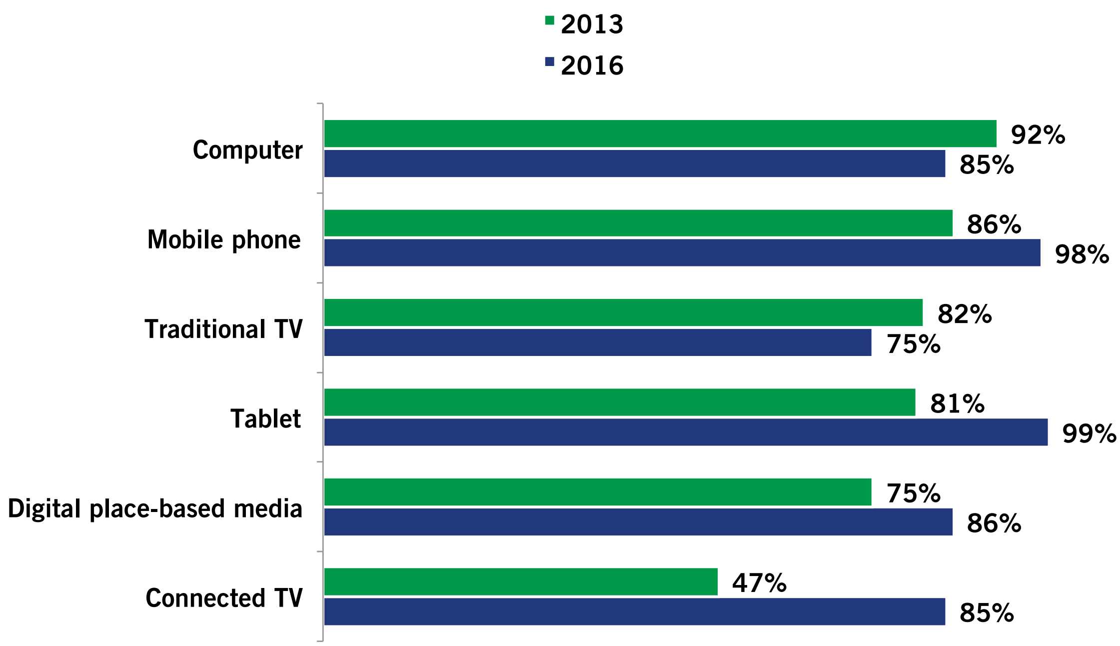
The screen types which respondents feel will be more important in three years as advertising vehicles are the tablet (99 percent), mobile phone (98 percent), digital place-based media (86 percent), and connected TV, defined as TV with built-in Internet connectivity or a third-party connection to the Internet, such as the Xbox or the Apple TV (85 percent). Meanwhile, the traditional TV set and the computer are expected to decline in importance as a viewing screen.

It is interesting to note that the mobile phone is rated as the second most important screen today (at 86 percent) as an advertising vehicle, yet that rating is inconsistent with actual spending behind mobile advertising.

Importance of Screens Today and in Three Years

(Top 2 Box Ratings on 5-Point Scale [Very/Somewhat Important)

Base: 142



*Q14. How important are each of these respective screens to you **now** as an advertising vehicle, and how important will they be in **three years**?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Media Sellers Expect Traditional TV Importance to Hold Steady

Client-side marketers and agencies expect a decline in importance of traditional TV, while media sellers project the importance of traditional TV to hold steady.

It is significant to note that the overall decline in the expected importance of traditional TV (between today and three years from now) is more than offset by dramatic increases in the importance of connected TV.

Importance of Screens Today and in Three Years

(Top Box Ratings on 5-Point Scale [Very Important])

Base: Total = 142; Client-Side = 57; Agencies = 42; Media Sellers = 41

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	2013	**2016**	**2013**	**2016**	**2013**	**2016**	**2013**	**2016**
Traditional TV	56%	44%	53%	36%	67%	52%	51%	49%
Computer	54%	51%	46%	39%	62%	60% b	59%	61% b
Mobile phone	46%	85%	44%	83%	51%	83%	44%	88%
Digital place-based media	41%	58%	44%	59%	46%	62%	32%	56%
Tablet	39%	84%	32%	75%	40%	88%	49%	90% b
Connected TV	19%	56%	11%	46%	21%	62%	30% b	63%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q14. How important are each of these respective screens to you **now** as an advertising vehicle, and how important will they be in **three years**?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

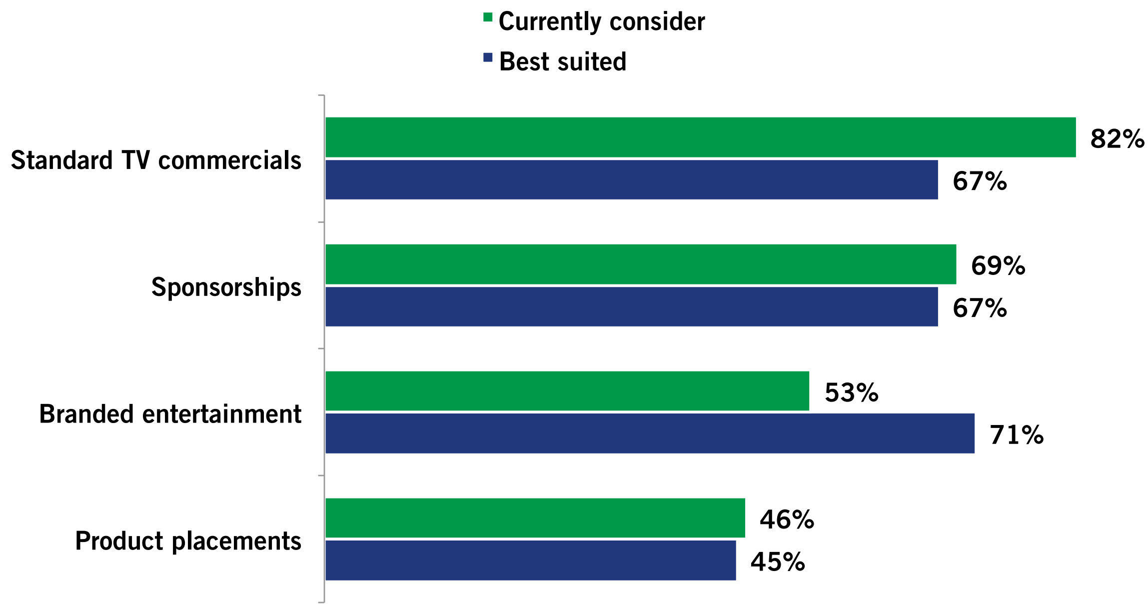
Section III: Expectations for Industry Evolution

Branded Entertainment Seen as Best-Suited Ad Platform for Multi-Screen Advertising

The television ad format with the highest current consideration is the standard TV commercial (82 percent). But only 67 percent rate standard TV commercials as best suited for integrated multi-screen advertising opportunities. Meanwhile, branded entertainment is seen as the best-suited format (71 percent) and has a positive gap between “currently consider” and “best suited,” suggesting opportunities for that platform.

Television Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: 121



*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Agencies and Media Sellers Still Think Standard TV Commercials Are Well-Suited for Multi-Screen Ad Opportunities; Client-Side Marketers Less Bullish

Standard television commercials receive mixed messages:

- For client-side marketers, 78 percent currently consider standard TV commercials, yet only 50 percent believe they are best-suited when pursuing integrated multi-screen advertising opportunities.
- Agencies and media sellers are bullish on standard TV commercials.
  - For agencies, 81 percent consider standard TV commercials to be best-suited for integrated multi-screen advertising opportunities.
  - For media sellers, 76 percent consider standard TV commercials to be best-suited.

The above implies that client-side marketers value standard TV commercials to a much lesser degree than agencies and media sellers.

There are also increased opportunities for branded entertainment across all constituencies.

Television Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: Total = 121; Client-Side = 54; Agencies = 37; Media Sellers = 37

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Currently consider	**Best suited**	**Currently consider**	**Best suited**	**Currently consider**	**Best suited**	**Currently consider**	**Best suited**
Standard TV commercials	82%	67% b	78%	50%	87%	81% b	86%	76% b
Sponsorships	69%	67%	67%	65%	73%	70%	69%	65%
Branded entertainment	53%	71%	43%	69%	70% ab	76%	52%	68%
Product placements	46%	45%	41%	44%	51%	54%	45%	38%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

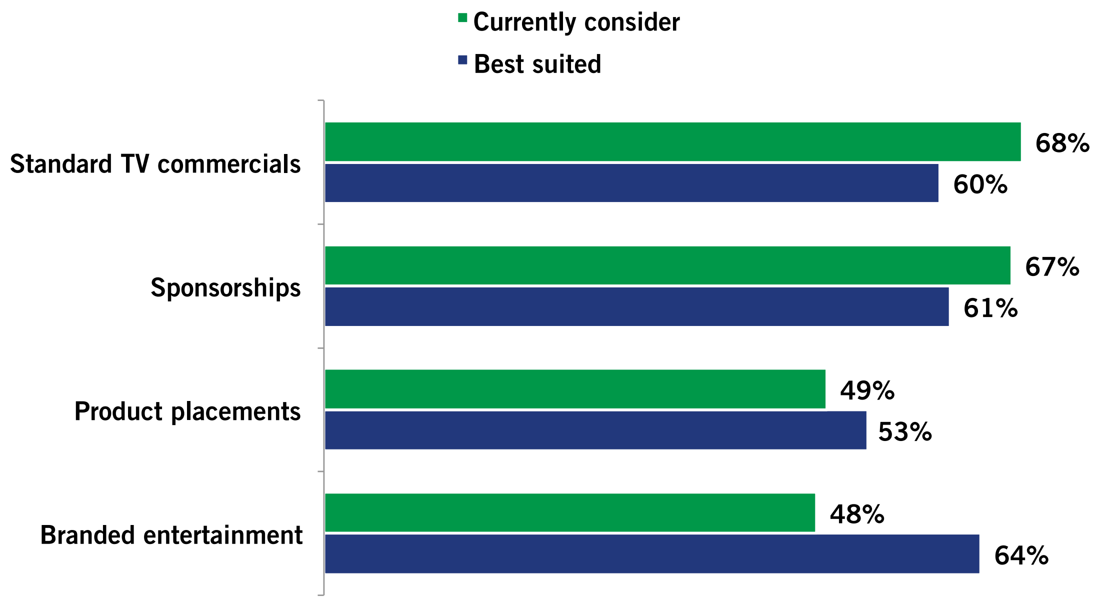
Section III: Expectations for Industry Evolution

Branded Entertainment Is Considered Best-Suited for Digital Place-based Media Formats

While standard television commercials (68 percent) are the most currently considered ad format for digital place-based media, branded entertainment (64 percent) is viewed as best-suited for this medium.

Digital Place-Based Media Ad Formats
Currently Consider/Are Best-Suited for Multi-Screen

Base: 116



*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Digital place-based media consists of screens found throughout the consumer journey in places where consumers have "dwell time" — malls, bars, gyms, doctor offices, office lobbies, elevators, restaurants, taxis, airports, planes, hotels, gas stations, etc. Digital place-based media is NOT transit advertising on the exterior of vehicles or electronic billboards where static images are digitally delivered.

Client-Side Marketers Consider Branded Entertainment to Be Best-Suited for Digital Place-based Media Formats

Broken out by industry stakeholder, branded entertainment is seen as best-suited for digital place-based media consistently across client-side marketers, agencies, and media sellers.

Client-side marketers, in particular, view branded entertainment as best-suited for digital place-based media.

Digital Place-based Media Ad Formats
Currently Consider/Are Best-Suited for Multi-Screen

Base: Total = 116; Client-Side = 49; Agencies = 34; Media Sellers = 34

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Standard TV commercials	68%	60%	62%	47%	68%	70% b	82%	71% b
Sponsorships	67%	61%	66%	57%	68%	64%	70%	65%
Product placements	49%	53%	47%	57%	50%	58%	48%	44%
→ Branded entertainment	48%	64%	38%	69%	50%	58%	63% b	62%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section III: Expectations for Industry Evolution

Client-Side Marketers See Increased Opportunities for Video and Native Advertising Formats

Client-side marketers rate video and native advertising as the ad formats poised for growth across PC/laptop, tablet, and mobile screens.

- Client-side marketers identify a gap between "currently consider" video and "best suited" for integrated multi-screen advertising opportunities, across PC/laptop, tablet, and mobile screens, indicating an opportunity for use of video to grow.
- There are also increased opportunities for native advertising (defined as sponsored content that marries the look and feel of the editorial with a message from an advertiser), as interest in content marketing is on the rise. This is consistent with previous findings regarding the growing interest in branded entertainment for television and digital place-based advertising.

Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Client-Side Marketers

Base: PC/Laptop = 53; Tablet = 50; Mobile = 54

	Personal Computer/ Laptop		Tablets		Mobile	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Social	88%	72%	76%	73%	80%	77%
Search	86%	60%	82%	62%	76%	57%
Display	79%	57%	84%	62%	70%	59%
Video	70%	85%	72%	92%	56%	72%
Native advertising	44%	59%	28%	46%	26%	42%
Text/SMS	NA	NA	NA	NA	37%	59%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Section III: Expectations for Industry Evolution

Measurement Keeps the Industry Up at Night

When asked to identify "the single biggest issue regarding multi-screen advertising that keeps you up at night," measurement, by a wide margin, was the most common response. Also noted was integration, including challenges integrating planning and reporting.

Measurement

- Audience identification ridiculously bad — online reach audiences actually have more waste than my TV buy
- How do we track engagement?
- How to measure ROI?
- Integrated metrics
- Lack of consistent and accredited measurement
- Lack of measurement in mobile
- Measurement
- Measurement (deeper measurement in TV, more standard measurement beyond TV)
- Measurement and UX (User Experience)
- Media people pretending it's impossible to measure or understand and fighting cost/spend without a knowledge base
- Metrics
- Realistic data
- ROI
- Standard way to measure across devices
- The metrics are all different and the newer forms are not as proven as the older forms like TV are for the brand
- Fragmented video formats and KPIs
- Accurate cross-platform rating delivery
- Verification of delivery impressions viewed in the U.S.

Integration

- It's not just multi-screen. It is multi 1,000-screens of choices and options that keep us awake. The proliferation of choices expands the complexity of choices and formats.
- Ability to show the same message across all screens
- Integrated planning and reporting tools — TV + iVideo
- Integration across types
- Problems with integration
- Still new so does it really add to the integrated mix?
- Understanding how to integrate into total marketing mix

Section III: Expectations for Industry Evolution

Agency Collaboration

- Agencies are not integrated enough within their own companies to think across media platforms and it's even harder if you have two different agencies managing different pieces of media (e.g., TV vs. search/social)
- Agency collaboration/fragmented planning

Creative Format Issues

- Altering creative/messaging based on size of screen
- Creating supporting landing pages/responsive web design to effectively convert prospective consumers when consumers are coming from different contextual places in their lives (i.e., on a phone they're in a much different place in the shopping path than when they're on their computer at home).
- Creative issues and formats

Cost

- The cost and effort to sync all platforms
- Time and cost

Miscellaneous

- Ability to reach targets
- How to seek a competitive edge over other telecommunication elements
- Noise from other elements the consumers experience
- The resource drain

Conclusions

Integrated multi-screen advertising is a preferred strategic direction of the marketing ecosystem. There are expectations across the industry for the majority of spend to shift to integrated multi-screen campaigns within three years. With this transformation, the industry needs more insights on effective integrated multi-screen campaign management. Furthermore, we can expect a greater emphasis on mobile and other connected devices as ad platforms, and adoption of TV buying practices online and vice-versa.

Yet significant barriers to multi-screen advertising achieving its potential still exist. Measurement remains a major challenge. Specialized metrics and methodologies for each screen need to evolve from activity-based to ROI-focused. That would help determine whether multi-screen campaigns are actually paying dividends. Without an integrated way to analyze results across screens, it is likely that multi-screen campaigns will not be managed in a fully integrated manner.

Consumers are still charging ahead, with viewership becoming screen-agnostic. The advertising industry is playing catch-up. Study after study shows the benefits of multi-screen over single-screen exposure for engaging these viewers in a way that converts them to customers. As an industry, we are sub-optimizing consumer engagement by not embracing integrated multi-screen advertising more vigorously and quickly.

What can we do *now* as an industry to accelerate the cause of multi-screen advertising in a way that is productive and profitable?

It's recommended that an industry-wide initiative to drive multi-screen measurement be established. Industry trade associations — initially led by ANA, ARF, and MRC — would invite key senior leaders from across the advertising ecosystem to join to help foster standards and best practices for multi-screen campaign measurement and management. This would build on Making Measurement Make Sense (3MS), an industry-wide initiative to improve cross-platform comparability through improved digital metrics and standards, particularly focused on supporting brand advertising.

1. **Breaking down internal silos.** There is the opportunity for better management of integrated multi-screen campaigns, as most organizations are not currently operating in a fully integrated manner.
    - Media companies must integrate their television and digital sales teams.
    - Agencies must integrate their television and digital video operations.
    - Client-side marketers need the decision-making process for multi-screen campaigns to be better integrated.

2. **Embracing true multi-screen measurement.** The industry needs to adopt standard measures that are consistent, comparable, and combinable across screens, and provide a complete picture of a campaign's effectiveness. The industry needs to go beyond using such measurement solely for insights and instead use it to assess performance of partners, teams, and individuals.

Conclusions

3. **Sharing results from multi-screen campaign activity.** Nobody has multi-screen advertising "figured out." The question of "what really works?" still looms large as a barrier to embracing it. While measuring multi-screen ad performance is a good first step, we need to have the courage to share results with the industry to optimize multi-screen activity. The industry needs to go beyond dressed-up case studies to share hard data on what has and hasn't worked.

4. **Creating a multi-screen measurement benchmarking tool.** As an example, Nielsen is developing a benchmarking tool to help individual industry players understand how they stack up against other advertisers, agencies, and publishers. Nielsen expects to offer this in early 2014, and invites anyone interested in participating to reach out. As part of this initiative, Nielsen will collect input from participants on their multi-screen advertising activities, performance diagnostics, and learnings and stories on what is and isn't working for them. ANA will assist in encouraging advertisers to participate and in sharing results.

Multi-screen advertising is an exciting development for our industry, offering new and better opportunities to engage consumers. It's up to us to do the work to capture that opportunity.

About the ANA

Founded in 1910, the ANA (Association of National Advertisers) leads the marketing community by providing its members with insights, collaboration, and advocacy. ANA's membership includes more than 500 companies with 10,000 brands that collectively spend over $250 billion in marketing and advertising. The ANA strives to communicate marketing best practices, lead industry initiatives, influence industry practices, manage industry affairs, and advance, promote, and protect all advertisers and marketers. For more information, visit www.ana.net, follow us on Twitter, and like us on Facebook.

Additional ANA Resources

Marketers are encouraged to tap into the various resources of the ANA to learn more about the marketing industry:

ANA Marketing Knowledge Center: To find articles and presentations on a range of marketing topics, visit www.ana.net/mkc, or to submit a customized information request to the Insights Team, visit www.ana.net/asktheexpert.

ANA Survey Research: ANA surveys are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today. To access survey reports, which allow you to tap into members-only research and perspective, please visit www.anasurveys.net.

ANA Insight Briefs: ANA Insight Briefs are compilations of the ANA's best resources on a given subject. Filled with charts, quotes, and client-side marketer case studies, they provide today's busy marketer with top-line information on the hottest topics in marketing. For more information, please visit www.ana.net/insightbriefs.

ANA Committees: ANA committees offer members a forum for sharing best practices, the opportunity for peer-to-peer networking and benchmarking, and the ability to learn about new industry developments through the exchange of ideas with guest speakers and fellow committee members. ANA committees also often take leadership roles in shaping industry issues. For more on ANA committees, please go to www.ana.net/committees.

ANA Conferences: The ANA helps the marketing community stay abreast of cutting-edge trends and best practices via a comprehensive calendar of national conferences. In addition, the ANA goes on the road to offer members a portfolio of peer-to-peer gatherings that afford opportunities to discuss special needs in a convenient, informal setting. Find more information at www.ana.net/events.

ANA School of Marketing: The ANA School of Marketing offers marketers on-site training sessions and full-day classes that help marketers grow as brand builders. Find more information at www.ana.net/schoolofmarketing.

About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

For more information, visit www.nielsen.com. To access reports, visit www.nielsen.com/us/en/reports, and for news and insights, visit www.nielsen.com/us/en/newswire.

Appendix A: Additional Data/Charts

Percentage Spend/Sales from Multi-Screen Campaigns

Percentage of Total Media Spend/Sales Attributed to Integrated Multi-Screen Campaigns (by Constituent)

Base: Total = 212; Client-Side = 86; Agencies = 55; Media Sellers = 67

	None		1–25%		26–50%		51–75%		76–100%	
	2013	2016	2013	2016	2013	2016	2013	2016	2013	2016
Total	9%	1%	66%	27%	13%	26%	8%	23%	4%	23%
Client-side marketers	14%	2%	57%	35%	10%	22%	13%	19%	6%	22%
Agencies	5%	0%	67%	27%	20%	18%	6%	34%	2%	21%
Media sellers	6%	0%	75%	17%	9%	36%	6%	21%	4%	26%

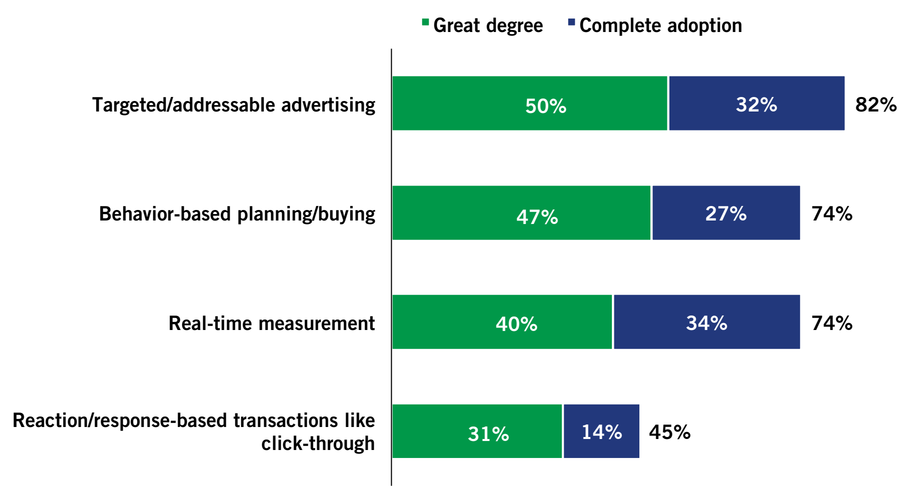
*Q4. **Buyers**: In relation to your total media spend, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*
*Q4. **Sellers**: In relation to your total sales revenue, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Adoption of TV/Online Practices

Degree to Which Television Should Adopt Online Practices
(Top 2 Box Ratings on 5-Point Scale [Complete Adoption/Great Degree])

Base: 148

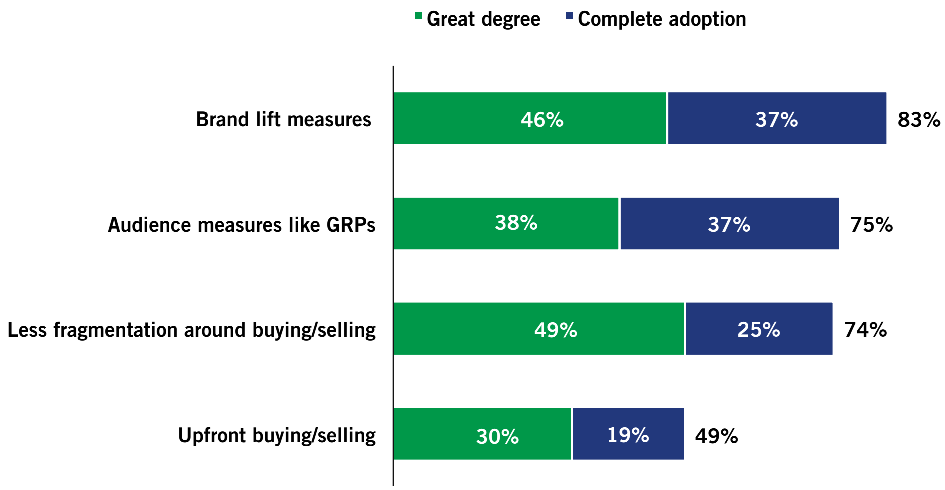


*Q12. To what degree do you want **television** to adopt each of the following online practices?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Degree to Which Online Should Adopt Television Practices
(Top 2 Box Ratings on 5-Point Scale [Complete Adoption/Great Degree])

Base: 149



*Q13. To what degree do you want **online** to adopt each of the following television practices?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Degree to Which Online Should Adopt Television Practices
(Top 2 Box Ratings on 5-Point Scale [Complete Adoption/Great Degree])

Base: Total MS = 45; TV Networks = 11; Online Pub./Ad = 24; Other Media Sellers = 14**

Media Sellers

	Total Media Sellers (a)	TV Networks (b)	Online Pub./ Ad Networks (c)	Other Media Sellers (d)
Brand lift measures	83%	73%	79%	79%
Audience measures like GRPs	75%	82% c	58%	72%
Less fragmentation around buying/selling	74%	91% bc	71%	64%
Upfront buying/selling	49%	64%	50%	57%

abcd = significantly higher than alternate segment at 95 percent confidence interval
**Caution: Very small base size.*

*Q13. To what degree do you want **online** to adopt each of the following television practices?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Importance of Screens as Advertising Vehicles

Importance of Screens Today and in Three Years

(Top Box Ratings on 5-Point Scale [Very Important])

*Base: Total MS = 41; TV Networks = 10**; Online Pub./Ad = 22; Other Media Sellers = 12**

Media Sellers

	Total Media Seller (a)		TV Networks (b)		Online Pub./Ad Networks (c)		Other Media Sellers (d)	
	2013	2016	2013	2016	2013	2016	2013	2016
Computer	59%	61%	40%	70%	68% b	59%	50%	58%
Traditional TV	51%	49%	80% c	80% c	32%	27%	67% c	67% c
Tablet	49%	90%	30%	80%	50% b	86%	58% b	100% b
Mobile phone	44%	88%	20%	80%	46% b	82%	58% b	100% b
Digital place-based media	32%	56%	20%	50%	36%	50%	33%	75% bc
Connected TV	30%	63%	22%	50%	33%	57%	33%	83% bc

abcd = significantly higher than alternate segment at 95 percent confidence interval
Caution: Very small base size.
**Caution: Extremely small base size.*

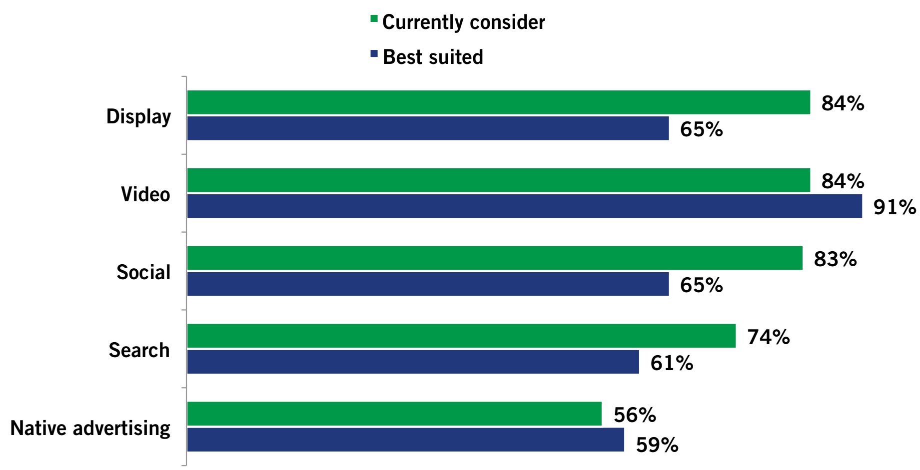
*Q14. How important are each of these respective screens to you **now** as an advertising vehicle, and how important will they be in **three years**?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Appendix A: Additional Data/Charts

PC/Laptop Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: 133



*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

PC/Laptop Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: Total = 133; Client-Side = 53; Agencies = 41; Media Sellers = 38

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Display	84%	65%	79%	57%	90%	67%	88%	76% b
Video	84%	91%	70%	85%	95% ab	94%	94% ab	95% ab
Social	83%	65%	88%	72%	85%	67%	74%	53%
Search	74% d	61%	86% ad	60%	76% d	72%	50%	53%
Native advertising	56%	59%	44%	59%	68% b	58%	65%	61%

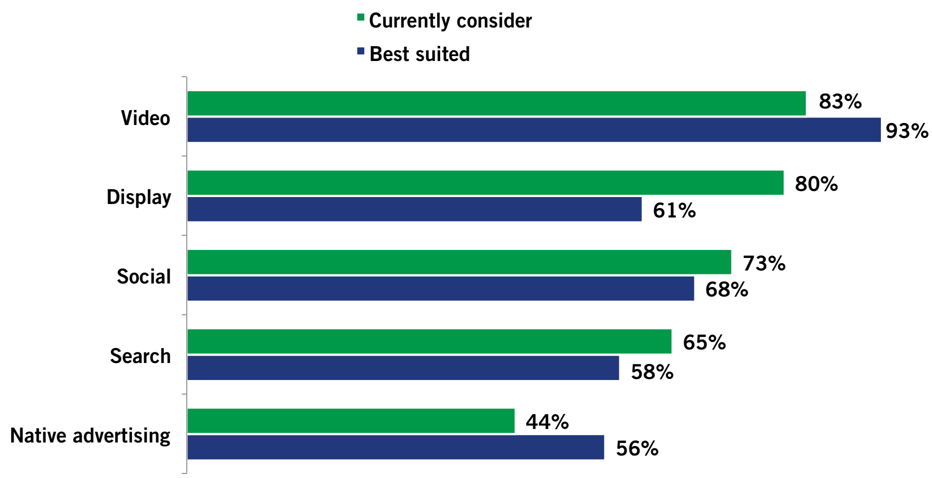
abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Tablet Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: 126



*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities?*
*Q16. What advertising formats do you believe are **best suited** for integrated multi-screen advertising opportunities?*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Tablet Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: Total = 126; Client-Side = 50; Agencies = 41; Media Sellers = 38

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Video	83%	93%	72%	92%	88%	97%	97% ab	90%
Display	80%	61%	84%	62%	78%	50%	79%	71%
Social	73%	68%	76%	73%	73%	75%	68%	55%
Search	65%	58%	82% acd	62%	63%	69% d	44%	42%
Native advertising	44% b	56%	28%	46%	49% b	56%	62% b	68% b

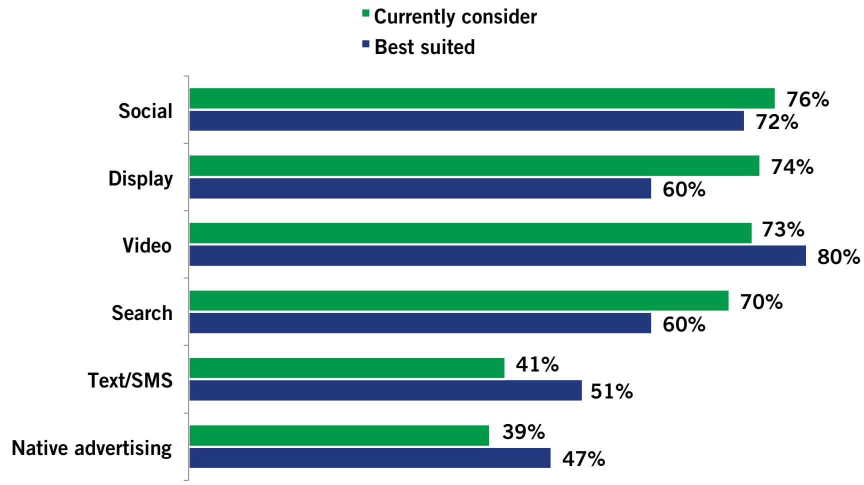
abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Mobile Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: 129



*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Mobile Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Base: Total = 129; Client-Side = 54; Agencies = 41; Media Sellers = 38

	Total (a)		Client-Side Marketers (b)		Agencies (c)		Media Sellers (d)	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Social	76%	72%	80%	77%	73%	72%	76%	66%
Display	74%	60%	70%	59%	81%	53%	76%	68%
Video	73%	80%	56%	72%	83% b	86%	91% ab	84%
Search	70%	60%	76%	57%	73%	67%	58%	58%
Text/SMS	41%	51%	37%	59%	51%	53%	33%	40%
Native advertising	39%	47%	26%	42%	39%	44%	61% ab	55%

abcd = significantly higher than alternate segment at 95 percent confidence interval

*Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
*Q16. What advertising formats do you believe are **best-suited** for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Agencies

Base: PC/Laptop = 41; Tablet = 41; Mobile = 41

	Personal Computer/ Laptop		Tablet		Mobile	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Social	85%	67%	73%	75%	73%	72%
Search	76%	72%	63%	69%	73%	67%
Display	90%	67%	78%	50%	81%	53%
Video	95%	94%	88%	97%	83%	86%
Native advertising	68%	58%	49%	56%	39%	44%
Text/SMS	NA	NA	NA	NA	51%	53%

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q15. What advertising formats do you ***currently consider*** *when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
Q16. What advertising formats do you believe are ***best-suited*** *for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Ad Formats Currently Consider/Are Best-Suited for Multi-Screen

Media Sellers

Base: PC/Laptop = 38; Tablet = 38; Mobile = 38

	Personal Computer/ Laptop		Tablet		Mobile	
	Currently consider	Best suited	Currently consider	Best suited	Currently consider	Best suited
Social	74%	53%	68%	55%	76%	66%
Search	50%	53%	44%	42%	58%	58%
Display	88%	76%	79%	71%	76%	68%
Video	94%	95%	97%	90%	91%	84%
Native advertising	65%	61%	62%	68%	61%	55%
Text/SMS	NA	NA	NA	NA	33%	40%

abcd = significantly higher than alternate segment at 95 percent confidence interval

Q15. What advertising formats do you ***currently consider*** *when pursuing integrated multi-screen advertising opportunities? Select all that apply.*
Q16. What advertising formats do you believe are ***best-suited*** *for integrated multi-screen advertising opportunities? Select all that apply.*

Source: 2013 ANA/Nielsen Integrated Multi-Screen Survey

Appendix B: Survey Firmographics

NOTE: Tables in this section may not add to 100% due to rounding.

In which category of product or service does your organization primarily market?*

Base: Those Answering	Total	Client-Side Marketers	Agencies	Media Sellers
	%	%	%	%
Apparel, Footwear	—	—	—	—
Automotive, Motorcycles	6	6	10	—
Business and Professional Services	3	—	3	6
Computers and Technology	2	—	—	6
Consumer Durables	5	8	3	3
Consumer Electronics	—	—	—	—
Consumer Services	1	—	3	—
Energy, Utilities	—	—	—	—
Entertainment, Media, Sports	20	12	11	46
Financial Services, Insurance	12	19	13	—
Food, Beverage, Tobacco	6	12	—	3
Health and Beauty	2	4	3	—
Pharmaceuticals, Health Care	9	11	10	3
Real Estate and Construction	—	—	—	—
Restaurants, Fast Food, Grocery Stores	1	2	—	—
Retail	6	4	8	6
Telecommunications	2	4	—	3
Travel, Transportation, Tourism, Hospitality	7	13	5	—
Other	18	6	32	24

*We speculate that some agencies and media sellers answered this question based on their respective accounts and/or customers.

Appendix B: Survey Firmographics

Is your company primarily B-to-C, B-to-B, or an about equal combination of both?				
Base: Those Answering	Total	Client-Side Marketers	Agencies	Media Sellers
	%	%	%	%
Primarily B-to-B	19	11	16	34
Primarily B-to-C	56	61	68	37
About equal combination of both	25	28	16	29

Which of the following best describes your organization's annual revenue?				
Base: Those Answering	Total	Client-Side Marketers	Agencies	Media Sellers
	%	%	%	%
Less than $1 million	—	—	—	—
$1 million–$9.9 million	10	2	28	7
$10 million–$49 million	14	4	31	15
$50 million–$99 million	7	2	10	11
$100 million–$249 million	12	11	10	15
$250 million–$499 million	10	8	10	11
$500 million–$999 million	3	4	3	—
$1 billion–$4.9 billion	21	32	—	26
$5 billion–$9.9 billion	6	11	4	—
$10 billion–$24 billion	4	6	4	—
$25 billion–$49 billion	1	2	—	—
$50 billion–$99 billion	4	6	—	4
$100 billion or more	8	11	—	11
Don't Know	—	—	—	—

Appendix B: Survey Firmographics

Which of the following best describes your organization's annual U.S. media budget?*				
Base: Those Answering	**Total**	**Client-Side Marketers**	**Agencies**	**Media Sellers**
	%	**%**	**%**	**%**
Less than $250,000	8	4	14	11
$250,000–$499,999	3	—	3	11
$500,000–$749,999	5	—	7	17
$750,000–$999,999	5	4	—	17
$1 million–$4.9 million	11	14	3	11
$5 million–$14.9 million	15	12	21	11
$15 million–$29 million	11	16	10	—
$30 million–$49 million	5	8	3	—
$50 million–$99 million	11	14	10	6
$100 million–$199 million	11	10	14	6
$200 million–$499 million	7	4	10	11
$500 million–$999 million	6	10	4	—
$1 billion or more	2	2	—	—
Mean	$123M	$146M	$97M	$53M

*We speculate that some agencies and media sellers answered this question based on their respective accounts and/or customers.

What is your job level?				
Base: Those Answering	**Total**	**Client-Side Marketers**	**Agencies**	**Media Sellers**
	%	**%**	**%**	**%**
CEO/President	2	—	5	—
Chief Marketing Officer	3	4	3	3
Executive Vice President	1	—	3	3
Senior Vice President	10	11	10	5
Vice President	16	9	21	22
Director	38	41	42	30
Brand or Product Manager	5	13	—	—
Associate Brand or Product Manager	1	2	—	—
Manager	19	17	8	32
Assistant Manager	—	—	—	—
Other	5	4	8	5

Appendix B: Survey Firmographics

In what functional area do you currently work?				
Base: Those Answering	**Total**	**Client-Side Marketers**	**Agencies**	**Media Sellers**
	%	**%**	**%**	**%**
Executive	2	—	5	3
Marketing	36	64	13	20
Advertising	20	7	50	8
Brand Management	3	6	—	3
Communications	—	—	—	—
Product Management	1	2	—	—
Information Technology	—	—	—	—
Procurement/Sourcing	6	15	—	—
Sales	13	4	3	36
Strategy	6	2	13	3
Research	13	—	16	28
Other	—	—	—	—

How many years have you personally been working in marketing/advertising?				
Base: Those Answering	**Total**	**Client-Side Marketers**	**Agencies**	**Media Sellers**
	%	**%**	**%**	**%**
Less than 1 year	—	—	—	—
1 to less than 2 years	1	—	—	3
2 to less than 5 years	3	4	3	3
5 to less than 7 years	9	9	8	10
7 to less than 10 years	9	7	8	10
10 to less than 15 years	22	23	21	23
15 to less than 20 years	16	26	5	13
20 to less than 25 years	19	19	24	15
25 to less than 30 years	15	11	15	18
30 years or more	6	—	16	5

Appendix C: Survey Questionnaire

Integrated multi-screen advertising is a topic that continues to dominate the conversation among brands, agencies, and media companies. Nielsen and the ANA have collaborated to understand the extent of multi-screen advertising campaigns today and plans for the future by fielding a quick survey among industry practitioners like you. We will share a summary of these results with all participants after the survey has concluded. Your responses are confidential. Thanks for your participation.

For the purpose of this survey, we will define "integrated multi-screen campaigns" as campaigns that have the same set of marketing objectives and run during a similar timeframe across two or more screens, including TV, computer, tablet, mobile phone, and digital place-based media. (Digital place-based media consist of screens found throughout the consumer journey in places where consumers have "dwell time" — i.e., malls, bars, gyms, doctor offices, office lobbies, elevators, restaurants, taxis, airports, planes, hotels, and gas stations. Digital place-based media is NOT transit advertising on the exterior of vehicles or electronic billboards where static images are digitally delivered.)

Q1. Which of the following best describes your organization? Select all that apply.

- ☐ Advertising agency — digital
- ☐ Advertising agency — full-service
- ☐ Media planning/buying agencies
- ☐ Client-side marketer
- ☐ Online publisher
- ☐ Online ad network
- ☐ Television network
- ☐ Other (please specify)

Q2. Which of the following best describes your functional area? Select all that apply.

- ☐ Account manager
- ☐ Brand/product manager
- ☐ Business/media strategy
- ☐ Marketing services
- ☐ Media buying
- ☐ Media planning
- ☐ Procurement/sourcing
- ☐ Research
- ☐ Sales
- ☐ Other (please specify)

Q3. Thinking of **today** and **three years** from now, please indicate the importance of integrated multi-screen campaigns in effectively delivering a marketing message.

	Today	Three Years From Now
Very important		
Somewhat important		
Neither important nor unimportant		
Somewhat unimportant		
Very unimportant		

DEFINE BUYER AS THOSE WHO ANSWERED CLIENT-SIDE MARKETER AT Q1

DEFINE SELLER AS ANY OTHER ANSWER AT Q1

Q4. [BUYERS — ANSWERED CLIENT-SIDE MARKETER (D) AT Q1] In relation to your total media spend, what percentage can be attributed to integrated multi-screen campaigns **today**, and how much do you think it will be **three years** from now?

[SELLERS — ANSWERED A, B, C, E, F, G, H, AT Q1] In relation to your total sales revenue, what percent can be attributed to integrated multi-screen sales **today**, and how much do you think it will be **three years** from now?

	Today	Three Years From Now
0% (None)		
1% to 10%		
11% to 25%		
26% to 50%		
51% to 75%		
76% to 99%		
100% (All)		

Q5. How does your organization typically manage integrated multi-screen advertising campaigns today? Are they…?

- ☐ Siloed (meaning separate groups for TV, mobile, digital, etc.)
- ☐ Integrated (the same group for TV, mobile, digital, etc.)
- ☐ Hybrid (a combination of siloed and integrated)

Q6. How likely is each of the following to lead you to increase your spending on integrated multi-screen campaigns?

	Very likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Very unlikely
Ability to use the same metrics online as are used offline					
Verification that advertising achieved the desired result					
Verification that advertising was delivered to the right audience					
Better integration of multi-screen campaign execution					
Consistent "currency" to facilitate planning and buying across screens					
Consistent metrics across screens					
More efficient production model for finishing creative to be used across screens					
More efficient planning and/or buying tools					

Appendix C: Survey Questionnaire

Q7. How important is it to understand each of the following for your integrated multi- screen campaigns?

	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
Which audience was reached					
Effectiveness of advertising in influencing opinion					
What the ultimate sales outcome was					

Q8. How are you **currently** measuring the effectiveness/ROI of your integrated multi-screen campaigns, and how would you **prefer** to measure the effectiveness/ROI of your integrated multi-screen campaigns?

	Currently	Prefer to
Use one set of metrics across all screens		
Use a variety of metrics specific to the individual screens		
Don’t measure effectiveness/ROI		

Q9. Among the benefits listed below, how critical is each to you for integrated multi-screen measurement?

	Extremely critical	Very critical	Somewhat critical	Not very critical	Not at all critical
Ability to use as currency for buying and selling					
Ability to understand competitive landscape					
Availability in key international markets					
Consistent methodology across media					
Integration with proprietary platforms/ process (third-party or internal)					
Real-time measures for optimization					

Q10. [BUYERS] How important are each of the following measures in enabling your **media planning and buying process** for integrated multi-screen advertising?

[SELLERS] How important are each of the following measures in enabling your **sales process** for integrated multi-screen advertising?

	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
Audience measures (reach, frequency, GRPs)					
Brand lift (awareness, likeability, purchase intent)					
Click-through rates					
On-target percentage of audience delivery					
Server-based impressions					
Viewability of creative					

Appendix C: Survey Questionnaire

Q12. As integrated multi-screen campaigns gains more attention, the industry is looking for a convergence of best practices between media.

To what degree do you want **television** to adopt each of the following online practices?

5 – point scale for each

	Not at all (1)	Small degree (2)	Moderate degree (3)	Great degree (4)	Complete adoption (5)
Behavior-based planning/buying					
Reaction/response-based transactions like click-through					
Real-time measurement					
Targeted/addressable advertising					

Q13. To what degree do you want **online** to adopt each of the following television practices?

5 – point scale for each

	Not at all (1)	Small degree (2)	Moderate degree (3)	Great degree (4)	Complete adoption (5)
Audience measures like GRPs					
Brand lift measures like recall					
Less fragmentation around buying/selling					
Upfront buying/selling					

Q14. How important are each of these respective screens to you **now** as an advertising vehicle, and how important will they be in **three years**?

NOW	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
Traditional TV					
Connected TV (TV with built-in Internet connectivity or a third-party box connected to the Internet, such as the Xbox, the AppleTV, or Playstation)					
Computer					
Tablet					
Mobile phone					
Digital place-based media					

THREE YEARS	Very important	Somewhat important	Neither important nor unimportant	Somewhat unimportant	Very unimportant
Traditional TV					
Connected TV (TV with built-in Internet connectivity or a third-party box connected to the Internet, such as the Xbox, the AppleTV, or Playstation)					
Computer					
Tablet					
Mobile phone					
Digital place-based media					

Q15. What advertising formats do you **currently consider** when pursuing integrated multi-screen advertising opportunities? Select all that apply.

Television

- ☐ Branded entertainment
- ☐ Product placements
- ☐ Sponsorships
- ☐ Standard television commercials

Personal Computer/Laptop

- ☐ Display
- ☐ Native advertising (defined as sponsored content that marries the look and feel of the editorial with a message from an advertiser)
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Tablets

- ☐ Display
- ☐ Native advertising
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Mobile

- ☐ Display
- ☐ Native advertising
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Digital place-based media

- ☐ Branded entertainment
- ☐ Product placements
- ☐ Sponsorships
- ☐ Standard television commercials

Q16. What advertising formats do you believe are **best suited** for integrated multi-screen advertising opportunities? Select all that apply.

Television

- ☐ Branded entertainment
- ☐ Product placements
- ☐ Sponsorships
- ☐ Standard television commercials

Personal Computer/Laptop

- ☐ Display
- ☐ Native advertising
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Tablets

- ☐ Display
- ☐ Native advertising
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Mobile

- ☐ Display
- ☐ Native advertising
- ☐ Search
- ☐ Text/SMS
- ☐ Video
- ☐ Social

Digital place-based media

- ☐ Branded entertainment
- ☐ Product placements
- ☐ Sponsorships
- ☐ Standard television commercials

Q17. What is the single biggest issue regarding multi-screen advertising that keeps you up at night?