



# A Comprehensive Picture of Digital Video and TV Advertising: *Viewing, Budget Share Shift and Effectiveness*



# Executive Summary

## Overview

Online video is changing how video content is viewed and how the advertising experience works. Through the financial and intellectual generosity of the sponsors of the research, Microsoft Advertising and Yahoo, we now have benchmark data on the entire video landscape.

## Viewing Patterns and Implications

- While TV maintains its audience with only slight erosion, digital video usage continues to grow in time spent and videos streamed.
- The lightest TV viewers stream more than twice as much as the heaviest TV viewers do (more than 7 hours per month spent on streaming video vs 3 hours).
- More women stream online video than men, but men spend more time viewing and watch more streams. The exception is long form videos, of which women stream more than men.

# Executive Summary

- Younger TV viewers, the coveted 18-34 demo, continue to grow their time spent with online video.

## **Viewing Patterns and Implications (continued)**

Implications for the future of digital video and TV, both imminent and longer term, include better opportunities to:

- Deploy digital media to buy video ad schedules targeting the hardest to reach audiences(light TV, male and younger viewers)
- Optimize video viewing through new content genres and formats that can travel across screens
- Change how narratives are built and sequenced, altering content windows, distribution and consumption

# Executive Summary

## Share Shift: TV Ad Schedules and What Happens When Dollars Are Reallocated to Digital

To **benchmark** how moving dollars from TV ad budgets to digital media\* affects reach and costs, the study examined 18 real TV schedules across key advertiser verticals. Categories include CPG (specifically HBA, Food, and Beverage), Technology, Automotive, Retail, Finance and Telecom. Analyses were done on aggregated schedules for CPG and also for the non CPG verticals.

The schedule reallocations provide reach for the TV only schedules, as well as movement of 5%, 10% and 15% of budget, respectively to digital media.

- Non CPG TV only schedules reach was 48.5% P18+ and CPG TV only schedules reach was 61.2% P18+, directionally in keeping with how ad schedules in those verticals usually compare for TV

\* Digital media includes video, rich media and other display formats.

# Executive Summary

## **Share Shift: TV Ad Schedules and What Happens When Dollars Are Reallocated to Digital**

- Across the 18 schedules in the study, budget shifts resulted in incremental reach for the same spend. The average increase in P18+ reach at a reallocation of 15% of budget was 4.2% or 4.2 reach points.
- Non CPG schedules averaged incremental P18+ reach of 6.2% (or 6.2 reach points) at a reallocation of 15% of budget.
- And on average, CPG P18+ reach grew 3.4% (3.4 reach points) when 15% of dollars moved into digital.
- Across verticals, the 15% share shift results in more reach at lower costs per point, dropping from an average of \$67.6K to \$63.0K. Corresponding CPM's go from \$13.82 to \$12.31

# Executive Summary

## Share Shift: TV Ad Schedules and What Happens When Dollars Are Reallocated to Digital

- For the reallocated schedules, the portion of reach points that is **duplicated** across **both** web and TV or the cross platform piece is greater than the new online only reach points.
  - For example, the TV only CPG schedules started at 61.2% P18+ reach and with 15% of budget shifted grew to 64.6% P18+ reach distributed as follows: 6.6% online only, 17% online + TV and 41% TV only.
  - Similarly, for non CPG schedules at 15% reallocation of budgets, the TV only schedule grows from 48.5% to 54.7% P18+ reach with 31.4 reach points in TV, 13.3 reach points online + TV and 10 reach points in online only
- ***The duplicated or online + TV reach is shown to be more effective on key brand effect metrics than either platform alone.***
- ***The sequence of exposure matters: prior exposure to an ad online enhances the impact of the TV exposure.***

# Executive Summary

## Implications of Reallocated Schedules and Cross Platform Duplication and Ad Effectiveness

- In an increasingly digital world, the value of duplicated, as a function of diverse ad experiences, is likely to increase.
- Frequency across TV and digital by target audience and within ad vertical need to be examined to optimize TV and digital platform schedules.
- Planning and running online video **first** can boost how well both the online video and TV portions of a campaign work.

# Executive Summary

## Video Brand Ad Effectiveness

- Online video ads score higher impact than TV ads on Nielsen measured metrics. Metrics are general recall, brand recall, message recall and ad likeability.
- Greatest differentials on all metrics occur for video ads in full episode players compared to TV, both broadcast and cable. For example, message recall at 40% is double that of TV at 20%. General recall is 64% (vs. 46% on TV), Brand recall is 50% (vs. 27% on TV) and Ad Likeability is 28% (vs. 17% on TV).
- Sequencing Matters. Prior exposure to online ads improves ad impact of TV ads by double digits. This is true across ad formats: Short Form, Full Episode or Display (Non-Video) Ads. Over half recall the ad, roughly one-third recall the brand or message and 20% like the ads online vs. TV.
- Ads are more effective online whether they are later duplicated on TV or as standalone online ads. Full Episodes are the most effective, outperforming TV across metrics, demos, content genres and Ad Verticals. Short form videos are often, but not always, more effective than TV ads.
- Superior performance on ad effectiveness for ads in short form online video is evident but the margins relative to TV narrow.

# Executive Summary

## Ad Receptivity

- On average, people streaming video watch ads for 20 seconds and average a completion rate of 87%
- Regardless of content, short or long form, mid roll ads enjoy the highest completion rates, 99% in short form and 89% in long form.
- Pre roll placements in short form ads average 79% completion rates and in long form 81%.
- Post roll placements in short form content average 71% completion rates and 79% in long form.

# Data Sources

- Custom analysis of a wide range of Nielsen media research products:
  - Nielsen Cross Platform Homes Single Source Panel
  - Nielsen VideoCensus Streaming Audience Measurement from Nielsen NetView Panel
  - TV/Internet Fusion Data
  - Video Brand Effect Survey Data
  - Video Analytics Census Data

*See appendix for overviews of each dataset methodology*

# Background:

## Online Video Definitions

- **Long form online video** – Any online video that, in it's total, is *longer* than 24 minutes in length, or a site where the majority of the content is *longer* than 24 minutes in length. (Includes all TV network sites and full episodes).
- **Short form online video** – Any online video that, in it's total, is *shorter* than 24 minutes in length, or a site where the majority of the content is *shorter* than 24 minutes in length.
- **Professionally produced content** – Any online video content that was produced in a professional or studio environment.
- **User generated content (UGC)** – Any online video content that was produced by an individual user in a non-professional context.
- **FEPs** – Full episode player (FEP) features an episode of a show that previously aired on television (example: Hulu)
- **Short Form Brand Effect Video** – All other online video formats except for the full episode player (example: Movie trailer)
- **Survey Period** – Jan 2011 – March 2012. Q1 2012 used for year over year comparisons

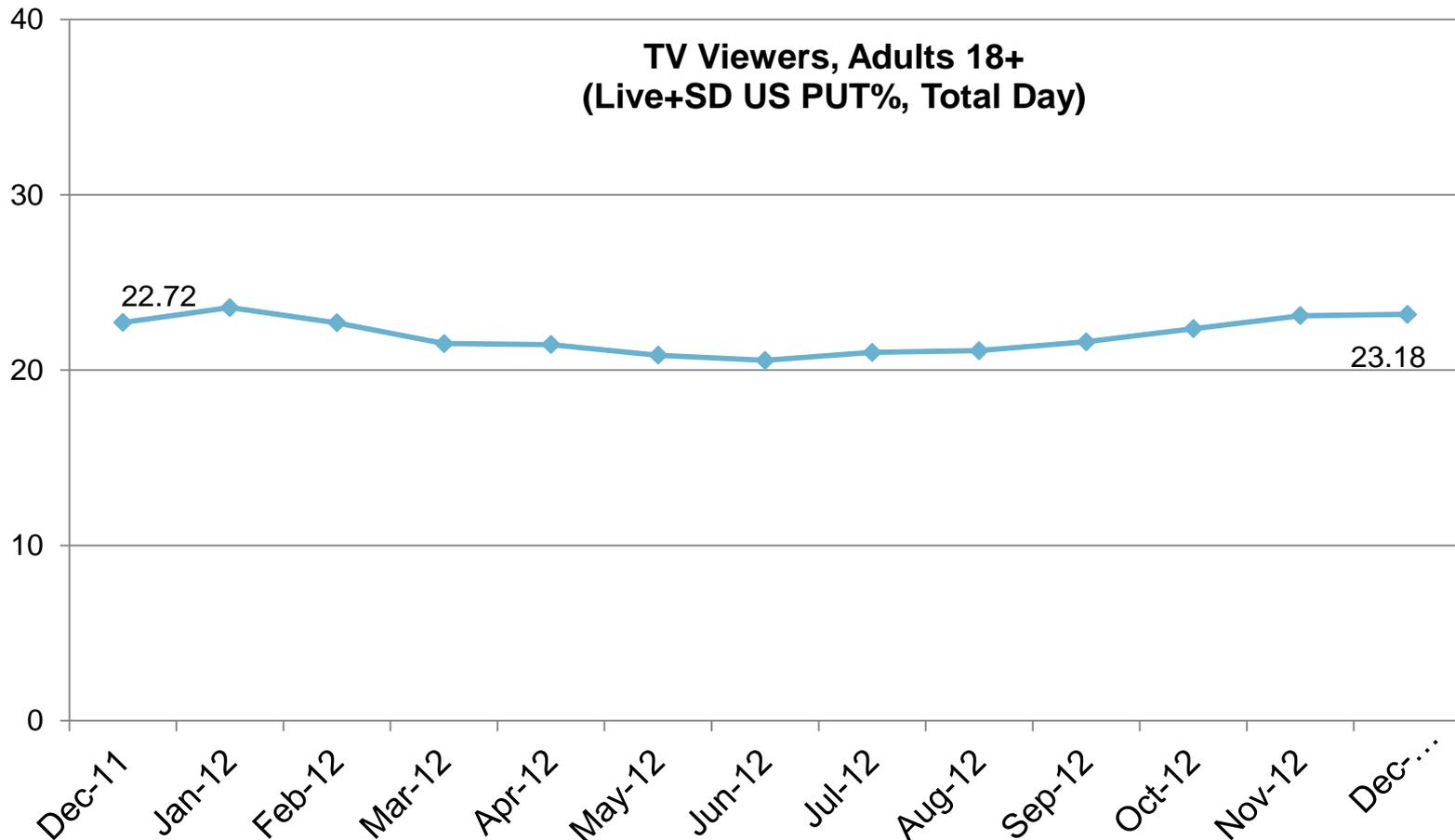
**Note:** Detailed Methodology slides are located in Appendix



# Online Video Usage Landscape: Digital Video is Growing



# Current State of TV: Viewing is Flat

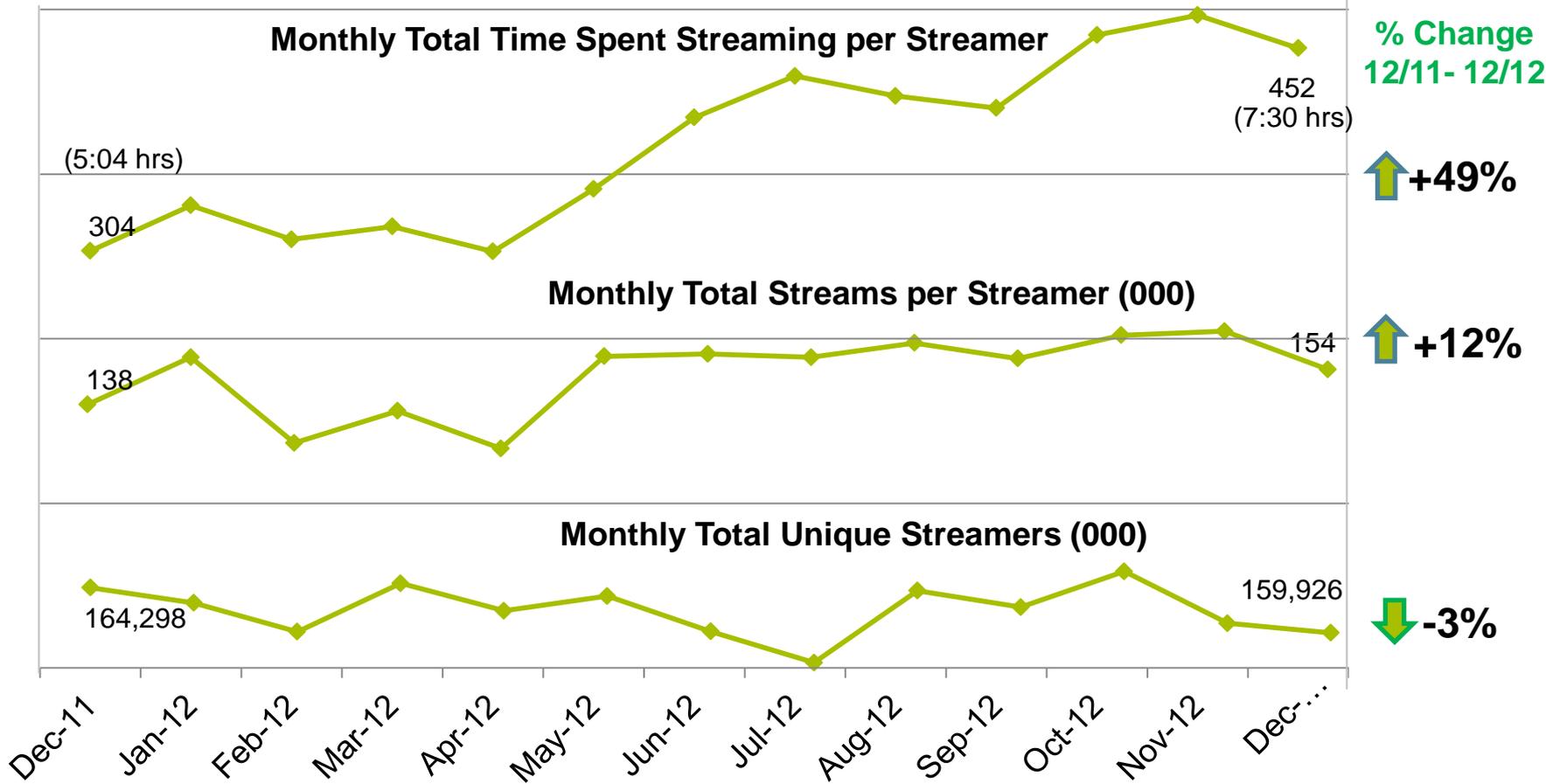


% Change  
12/11- 12/12

↑ +2%

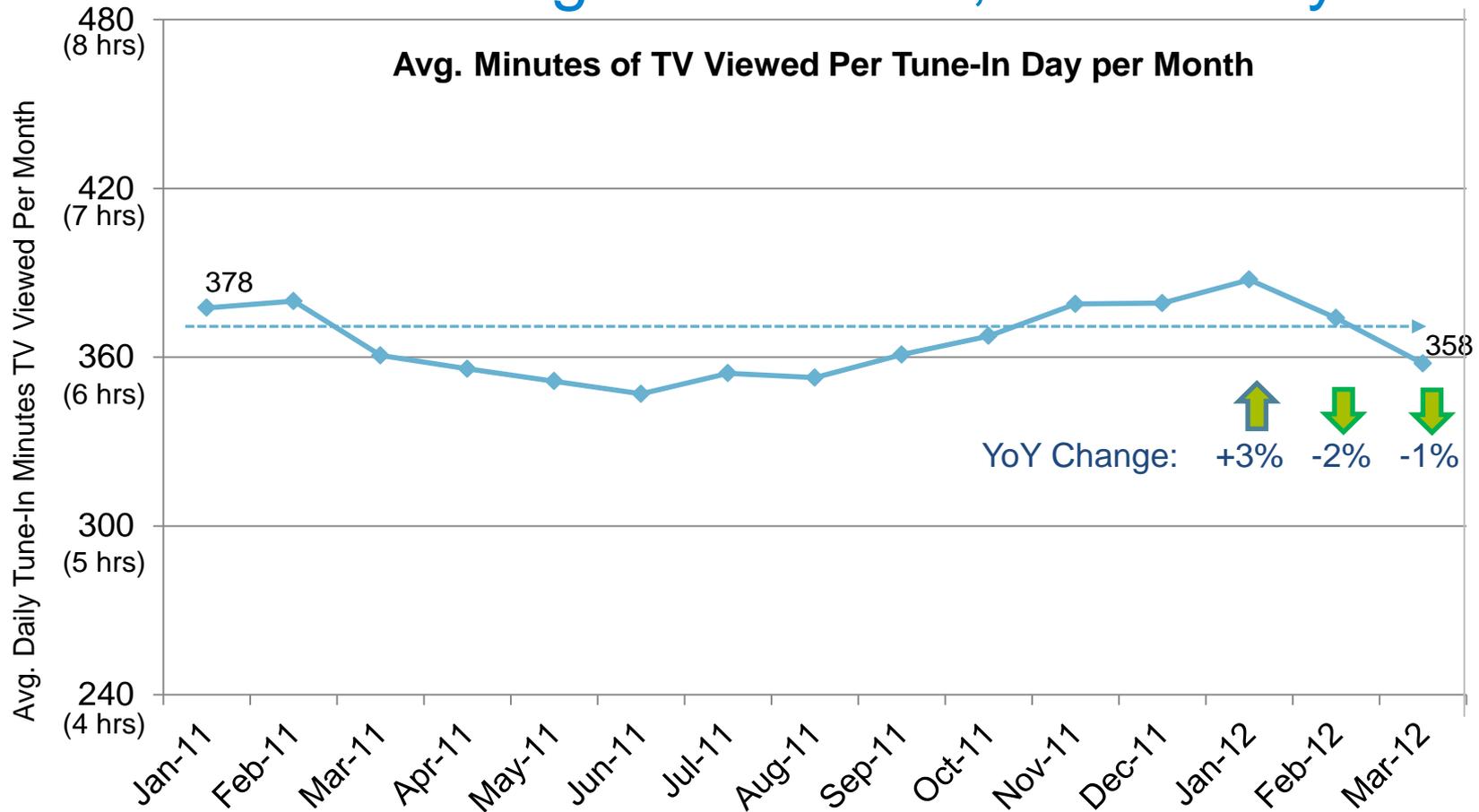
Nielsen Media Research (Syndicated Measurement)  
Dec. '11 – Dec. '12, Live+SD US PUT%

# Current State of Digital Video: Streamers Watch More Online Video for Longer



*Nielsen VideoCensus Dec. '11 – Dec. '12*

# For Online Video Streamers, TV Viewing is Seasonal, but Steady



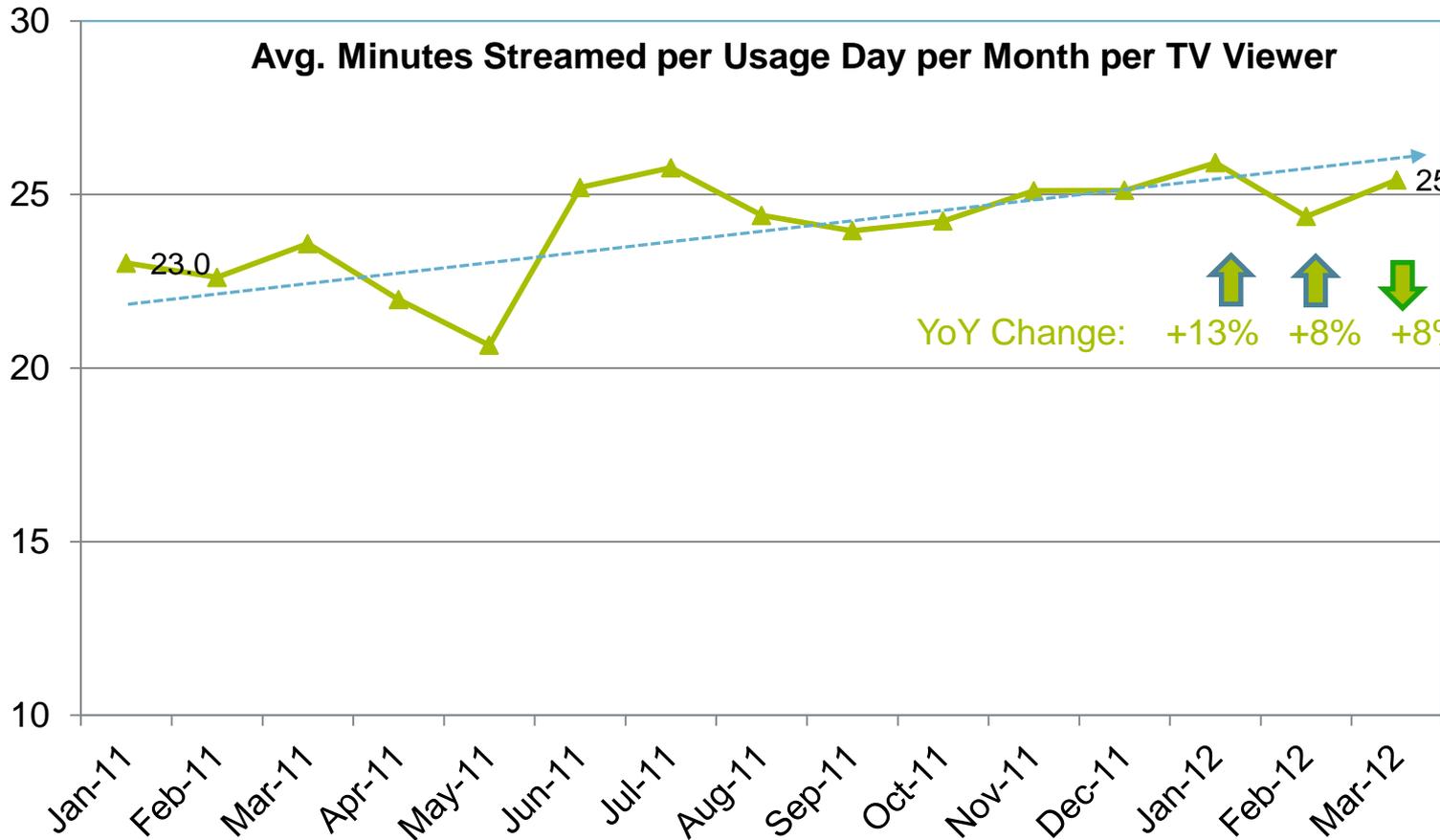
**% Change  
Jan 2011-  
Mar 2012**

**↓ -5%**

TV Viewing by Online Video Streamers  
Among Cross-Platform Homes Panel, A18+  
Custom Analysis

# Digital Video Viewing is Growing Among TV Viewers

Avg. Usage Day Minutes Streamed Per Month



% Change  
Jan 2011-  
Mar 2012

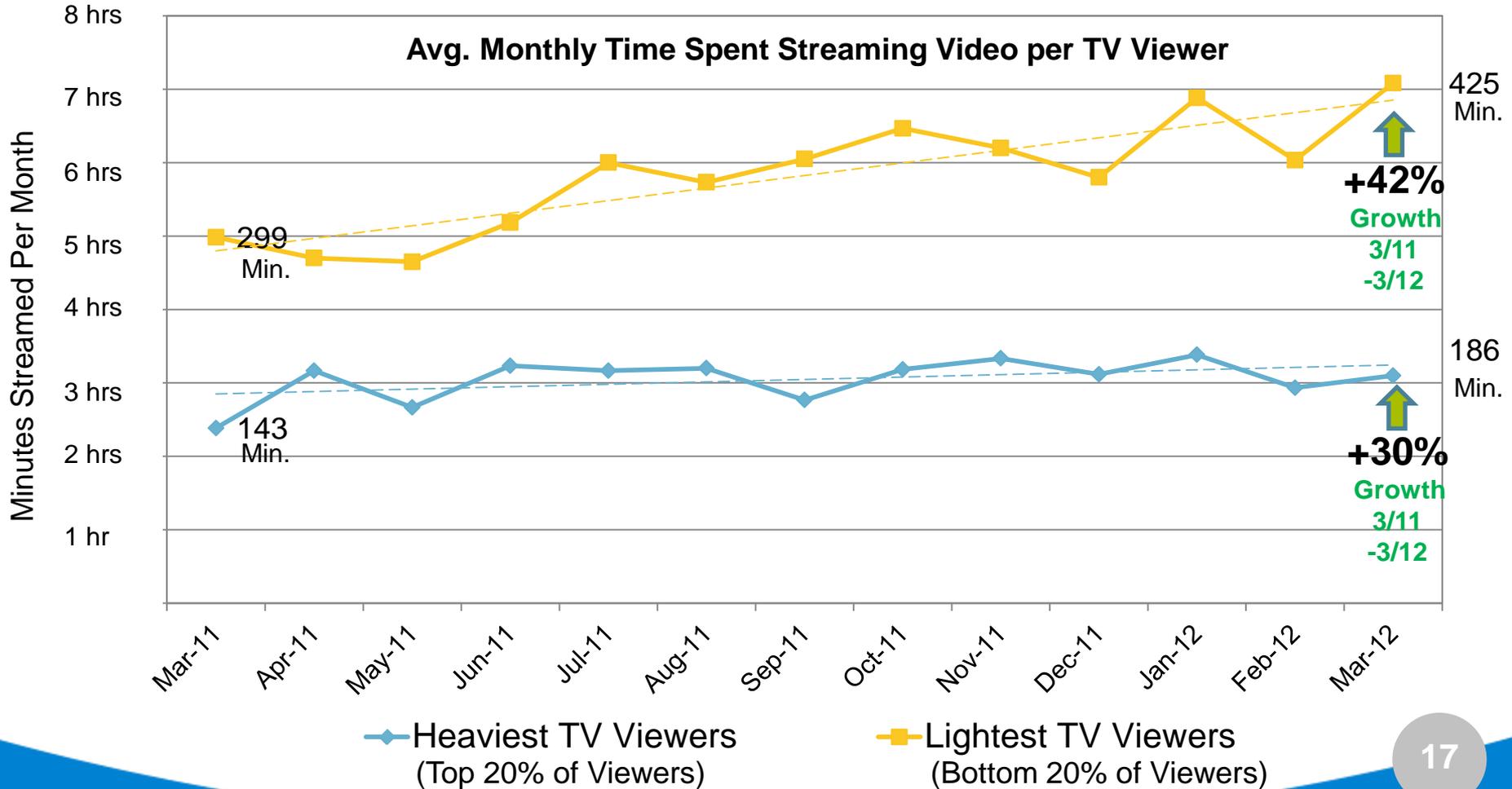
↑ +10%

YoY Change: ↑ +13% ↑ +8% ↓ +8%

Online Video Streaming by TV Viewers  
Among Cross-Platform Homes Panel, A18+  
Custom Analysis

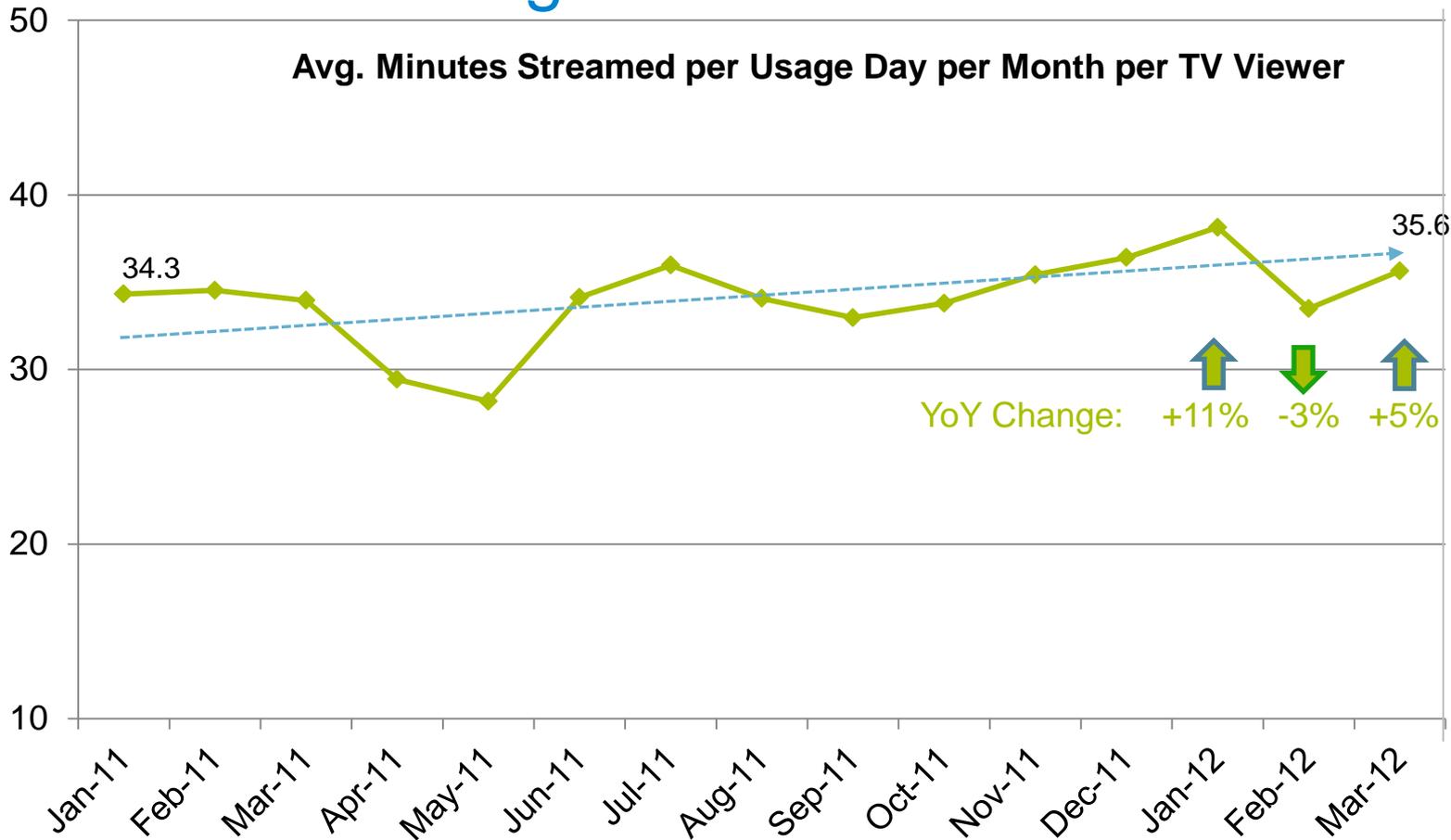
# Lightest TV Viewers are Watching Even More Online Video

- Lightest TV Viewers Stream TWICE as Much as Heavy TV Viewers



# Digital Video Viewing is Also Growing Among TV Viewers 18-34

Avg. Minutes Streamed per Usage Day per Month per TV Viewer

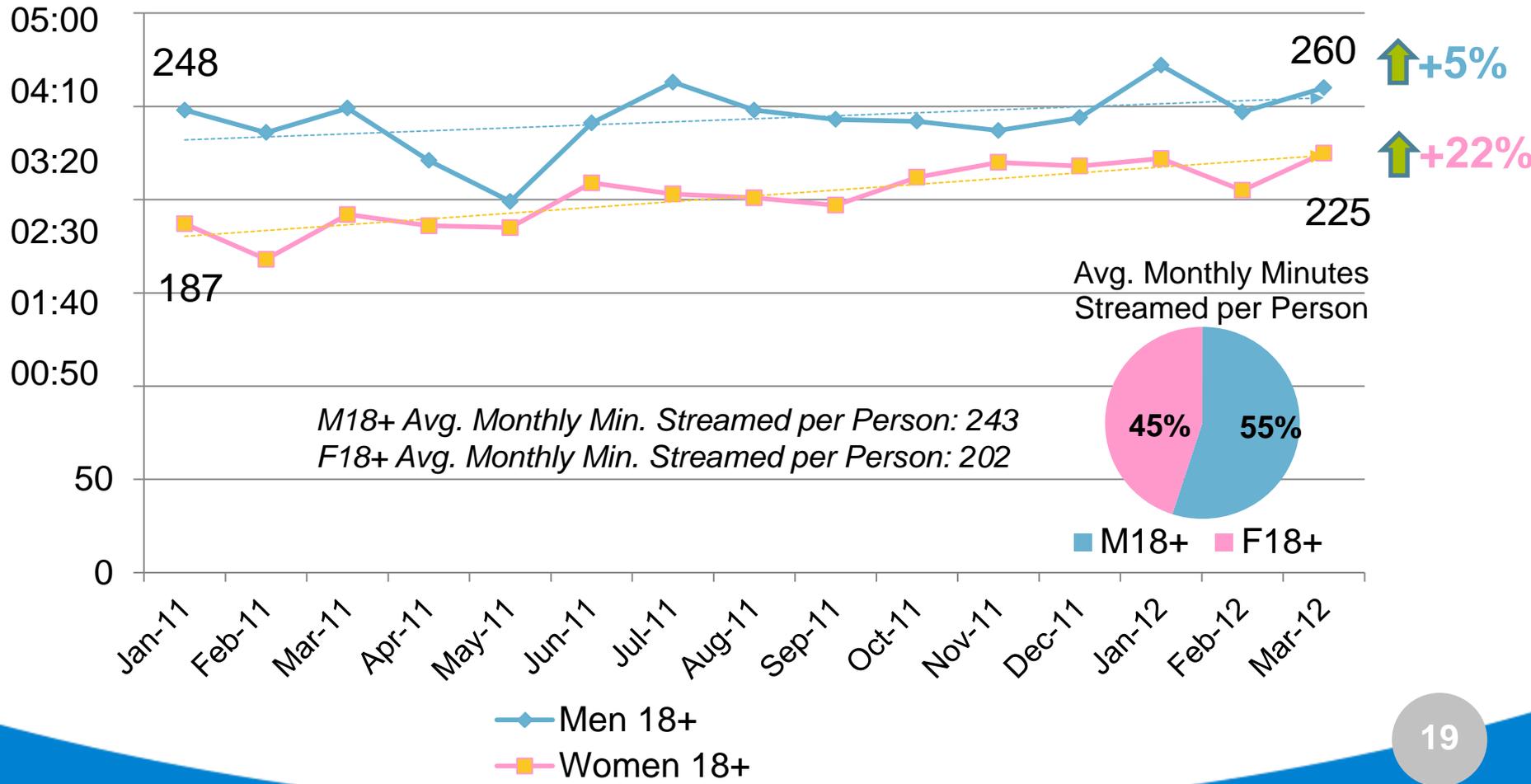


TV Viewing by Online Video Streamers

Among Cross-Platform Homes Panel, A18-34

# Men Stream More Minutes per Month But Women are Catching Up...

Hours and Minutes Streamed Per Month HH:MM

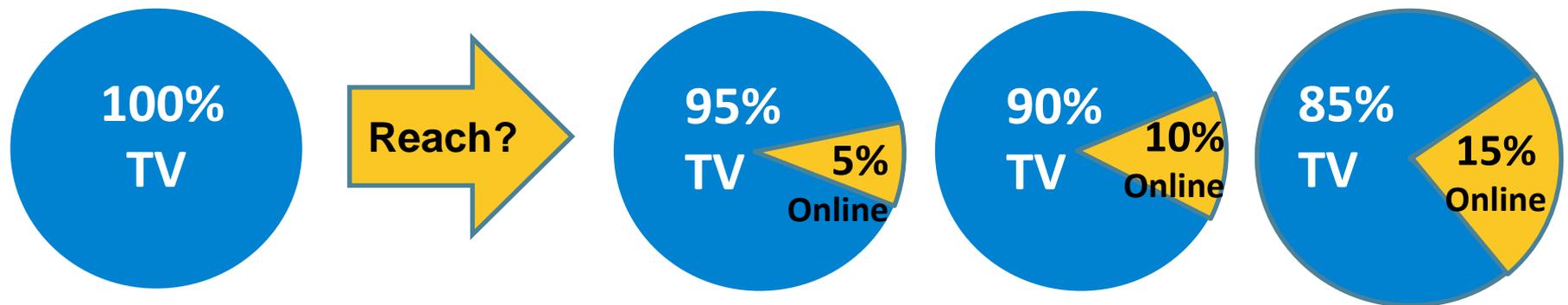




# Digital Share-Shift: Incremental Reach with Digital



# Share Shift: Reallocation of Budgets **iab.** from TV-Only Schedules to Digital Media



- Examined 18 different studies of real schedules\* that ran on TV across categories
- Compared Reach when 5%, 10% or 15% of budget is shifted to Digital\*\*
- Further comparison of CPG break out to Non-CPG categories

Total of 18 studies across the following categories: Food, Health & Beauty, Beverage, Technology, Auto, Retail, Finance, Telecom. CPG break out includes aggregate of Food, Health & Beauty, and Beverages.

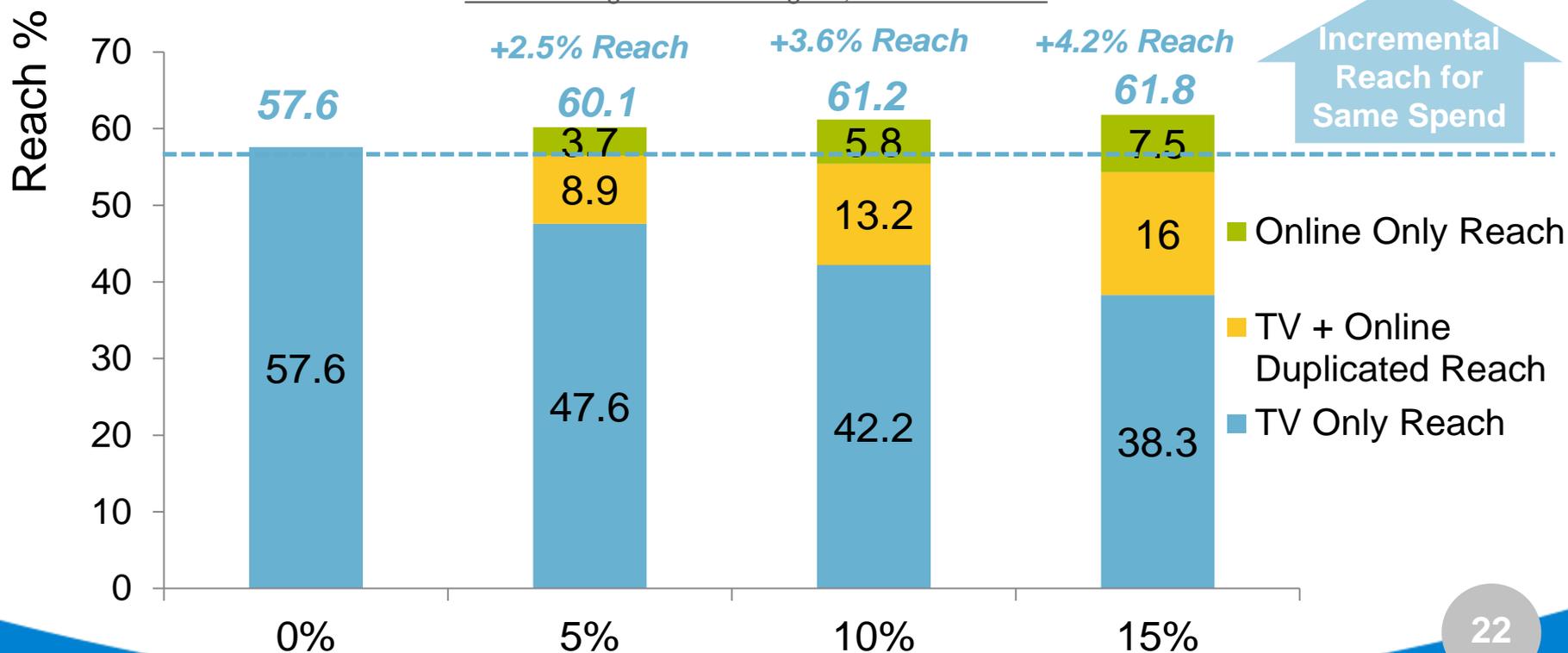
\*Digital media includes digital video and display. \*\*TV ad schedules came from a variety of verticals

21

# Shifting 15% of Media Spend to Digital Results in a 4% Increase in Advertiser Reach Across Verticals

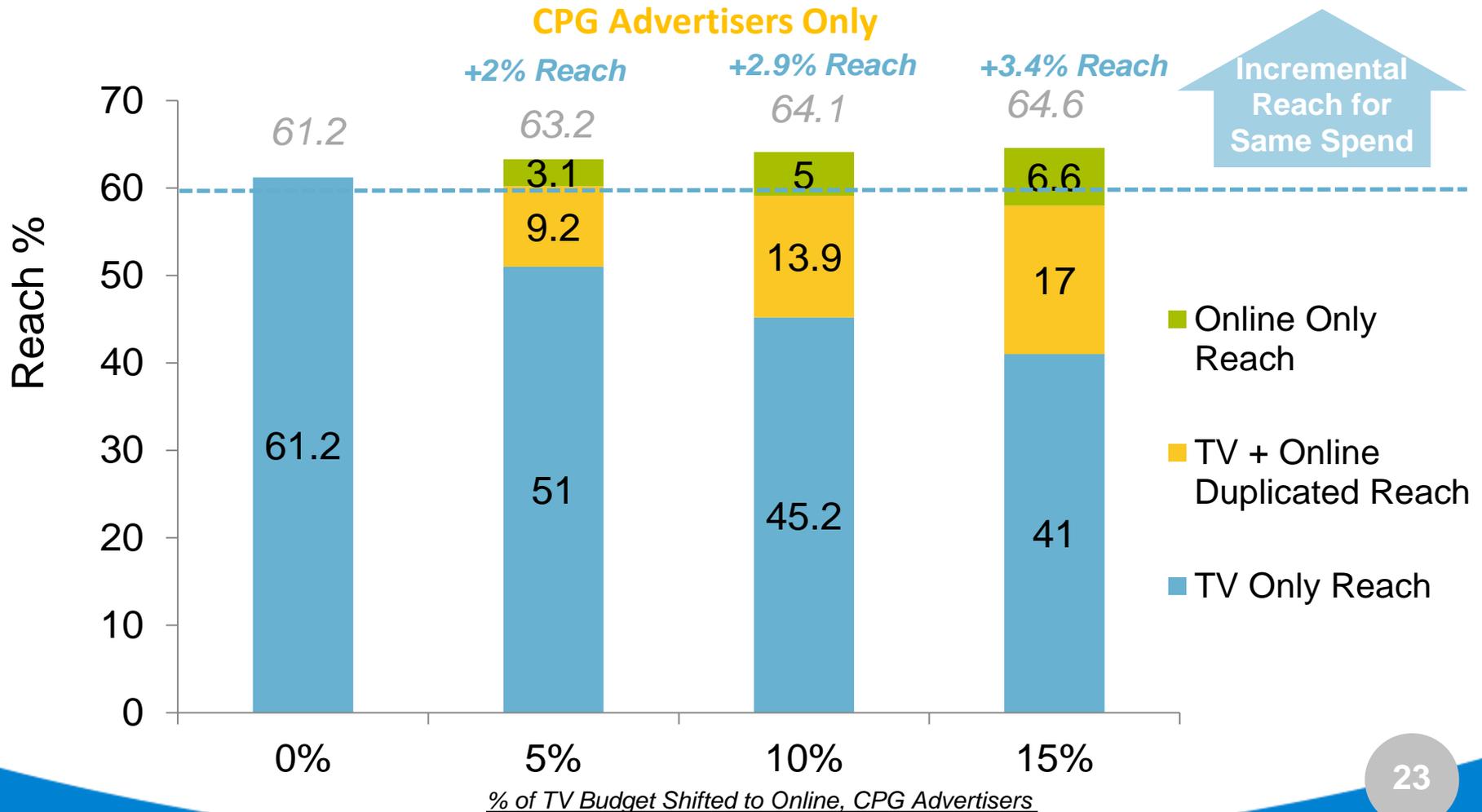


*% of TV Budget Shifted to Digital\*, Across Verticals*

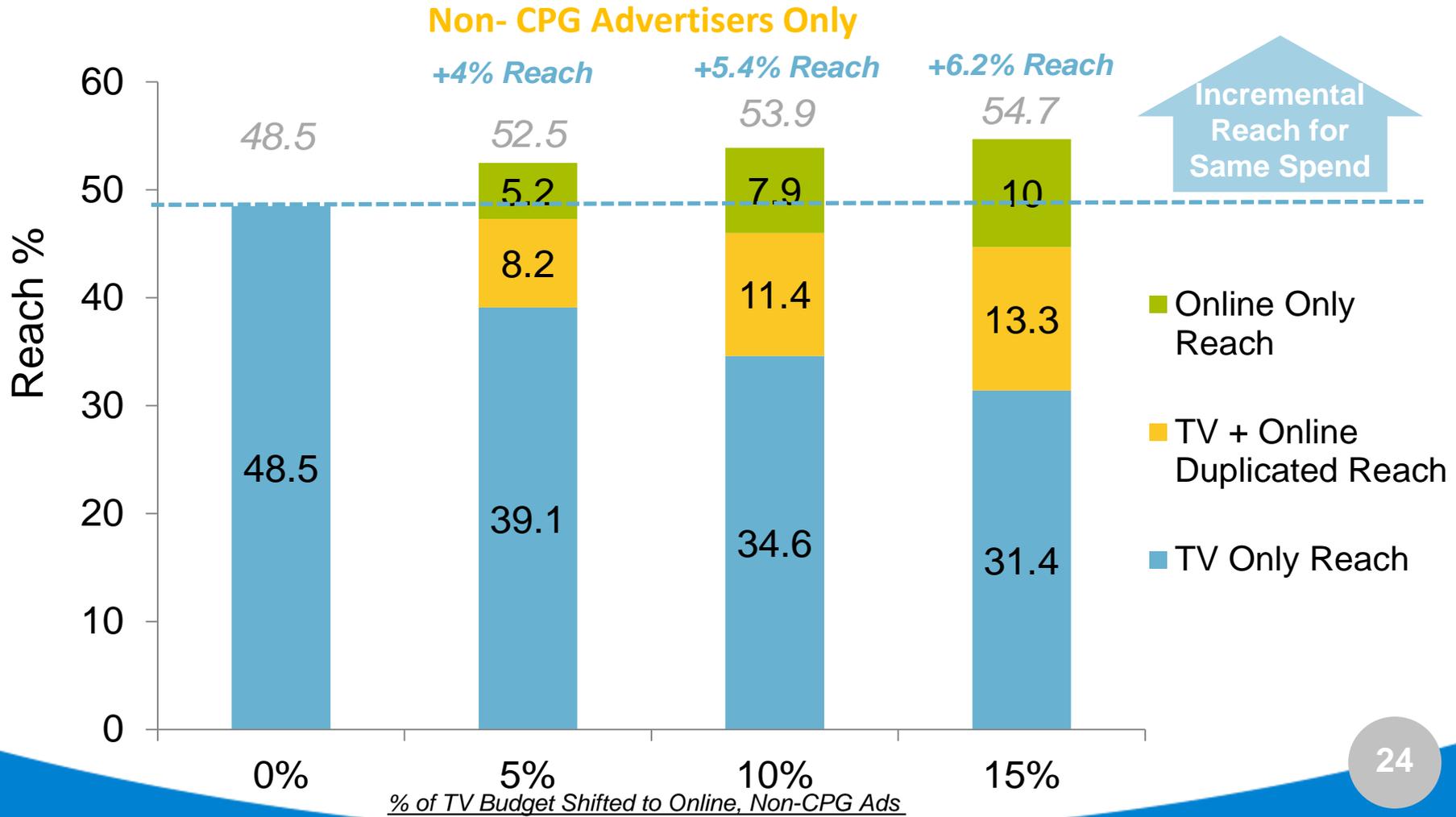


\*Digital media includes digital video and display.

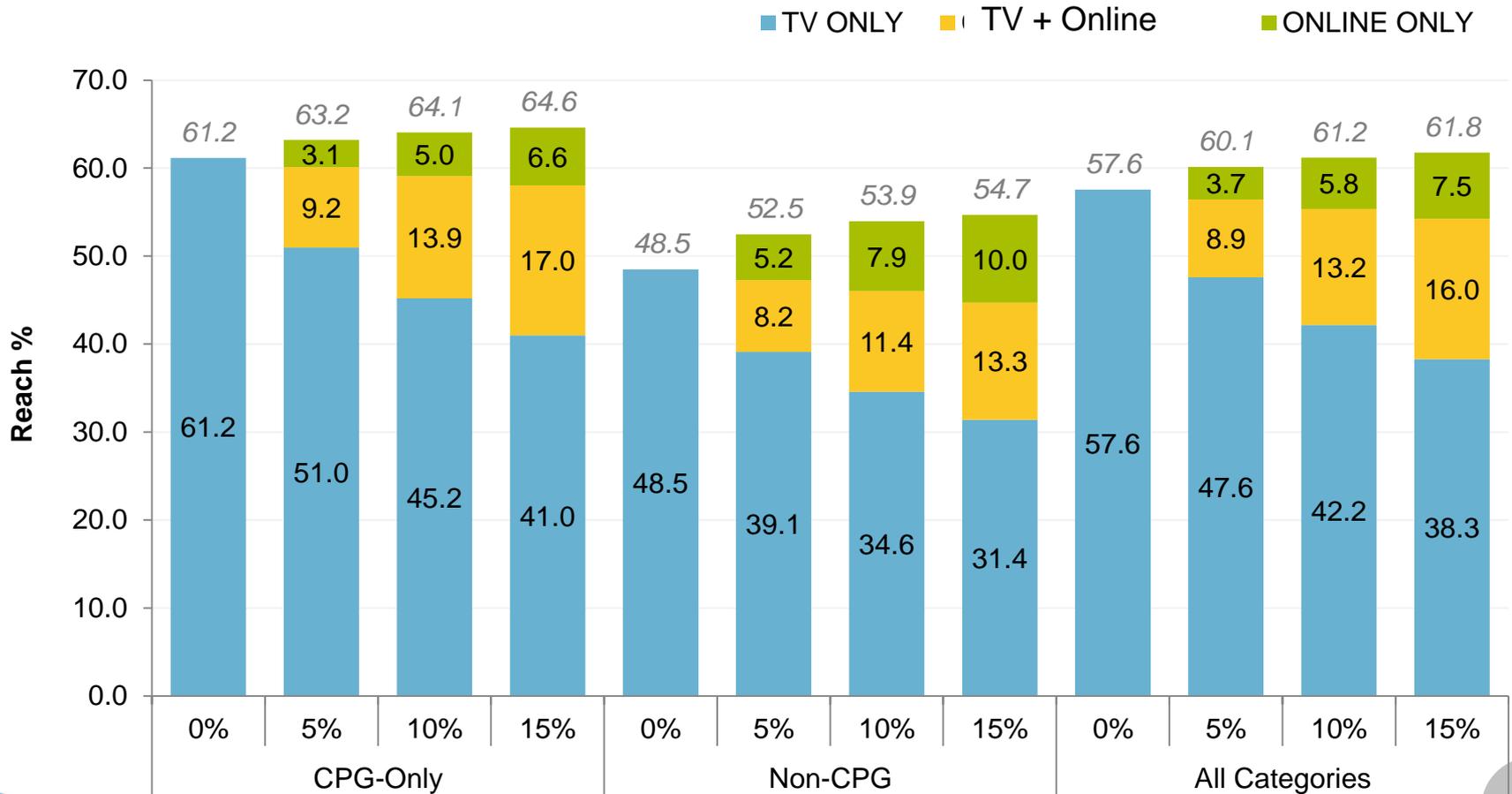
# CPG Advertisers Were Able to Reach 17% of Their Audience on Both Platforms by Shifting 15% of Spend to Digital



# Non-CPG Advertisers Can Increase Their Reach 6% By Shifting 15% Of Media Spend to Digital Properties



# Summary: Shifting Up to 15% of Ad Spend to Online Provides Incremental and Effective Reach



% of TV Budget Shifted to Online

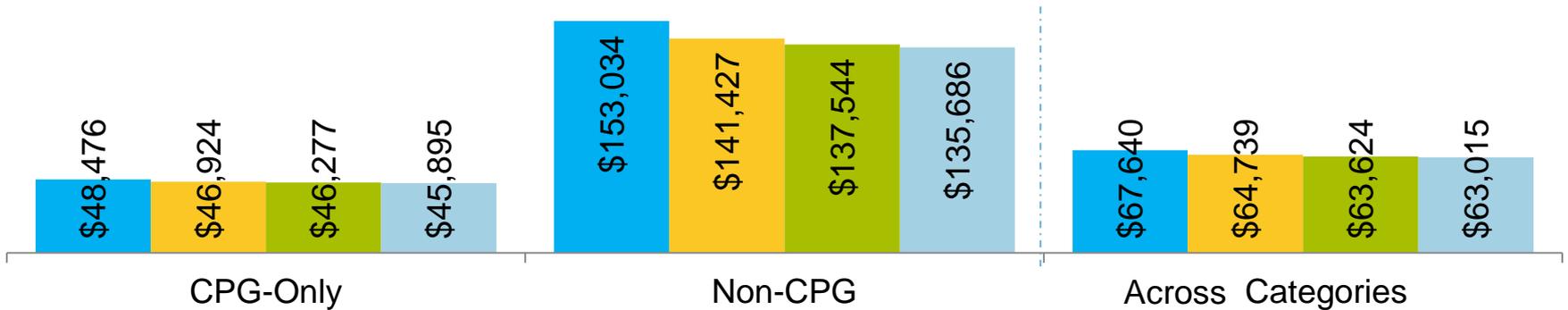
\*Online includes digital video and display ads.

Measurement Period: January 2011-March 2012  
 Total of 18 studies were aggregated to create norms across all categories  
 Note: Simulations done in IMS Campaign RF  
 Data Source: TV/Internet Fusion

# Reallocating Dollars To Online Builds Higher Quality, More Effective Reach at a Lower Cost

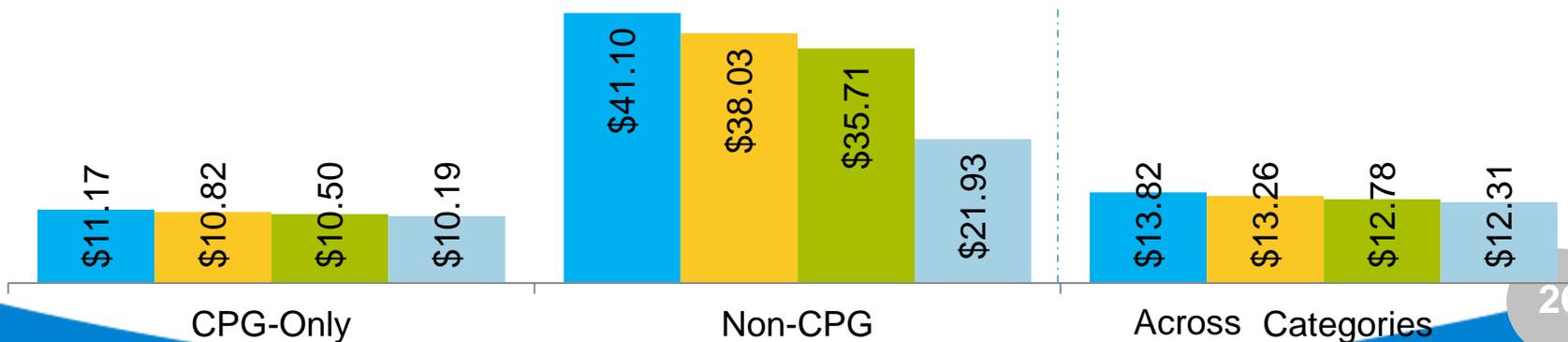
## Cost Per Reach Point

■ 0% ■ 5% ■ 10% ■ 15% % Shifted from TV to Digital



## Cost Per Thousand (CPM)

■ 0% ■ 5% ■ 10% ■ 15% % Shifted from TV to Digital



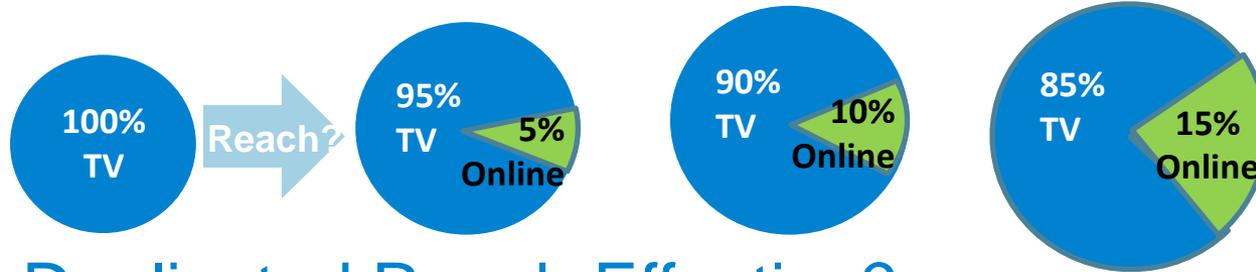
Note: Share shift slides Include video + display



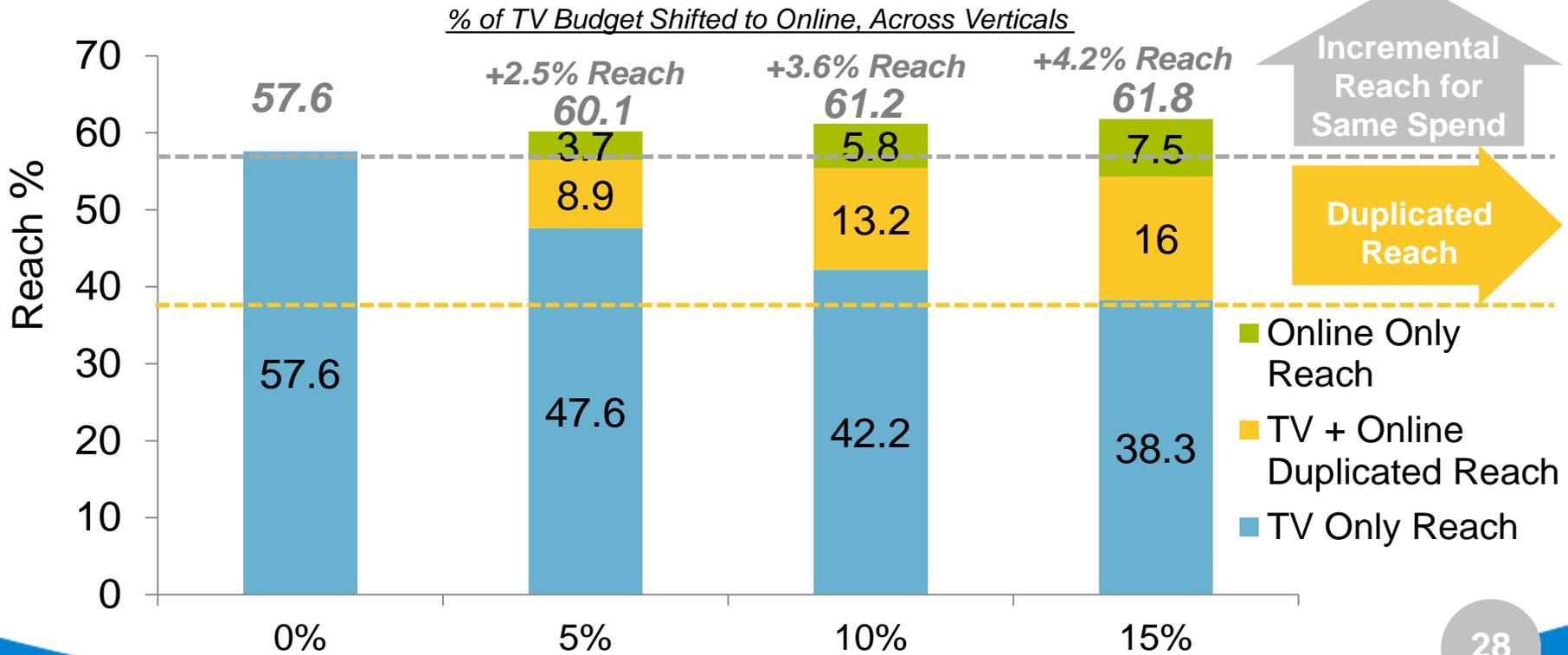
# Video Brand Effect and the Digital Multiplier: Driving Effectiveness With Duplication



# Shifting Media Spend to Digital Results in Duplicated Reach...



## ...But is Duplicated Reach Effective?



*\*In Share Shift slides, online includes digital video and display ads.  
In Brand Effect, digital video and display ads are shown separately.*

Standard TV includes TV ads on both cable and broadcast networks.

Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+

Green arrows indicate a positive difference at >90% confidence

TV data based on responses up to 1 day post-ad stream; Based on exposures to Video Ads in FEPs in the previous 7 days.

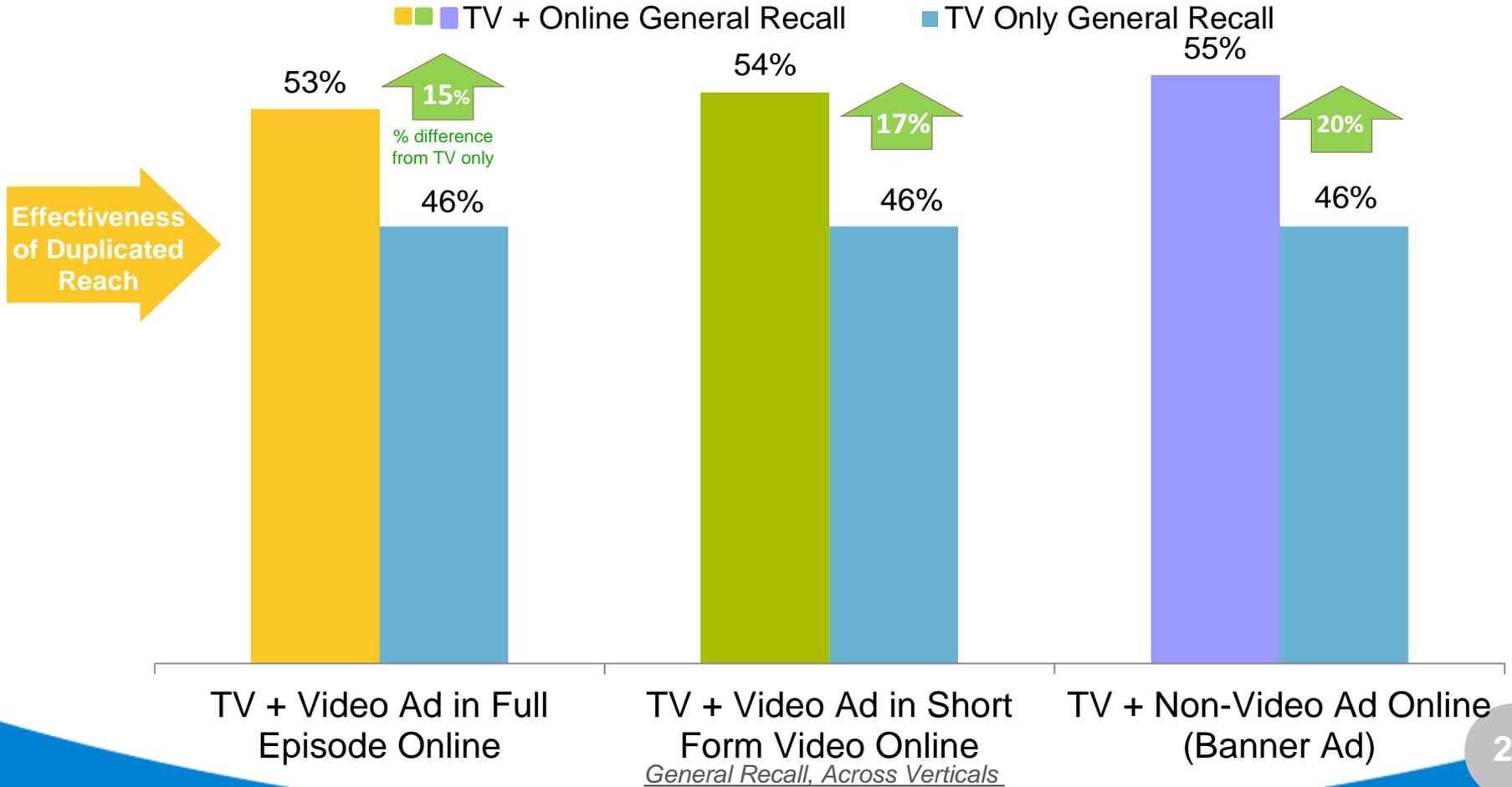
Based on Online Ad exposure before TV ad exposure.

Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary

700 Brands were included in FEP v TV data and 15 brands for SF vs. TV data.

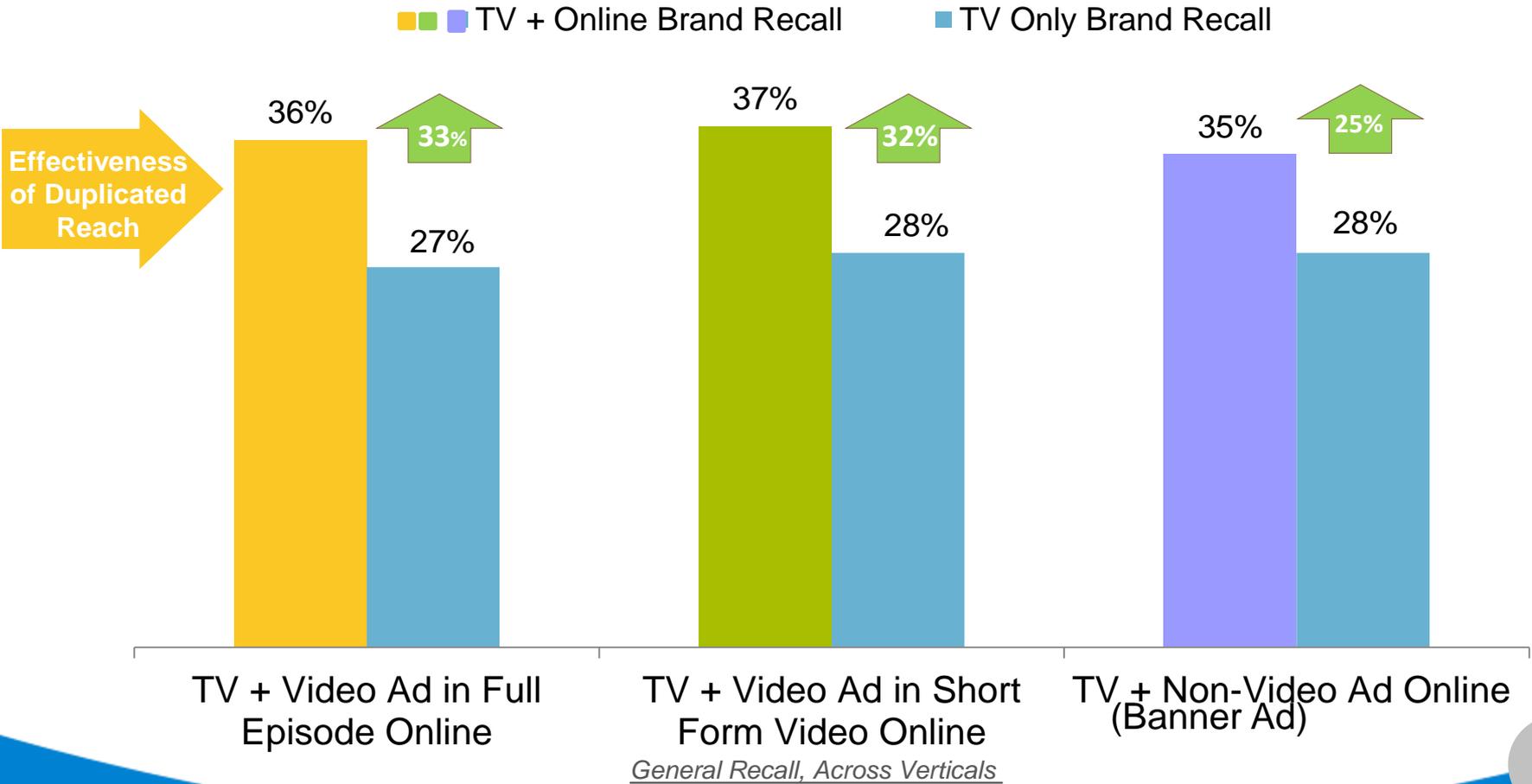
# General Recall of Ads on TV is Improved Through Duplication Online

- Prior Exposure to Ad in Online Formats Improves General Ad Recall on TV



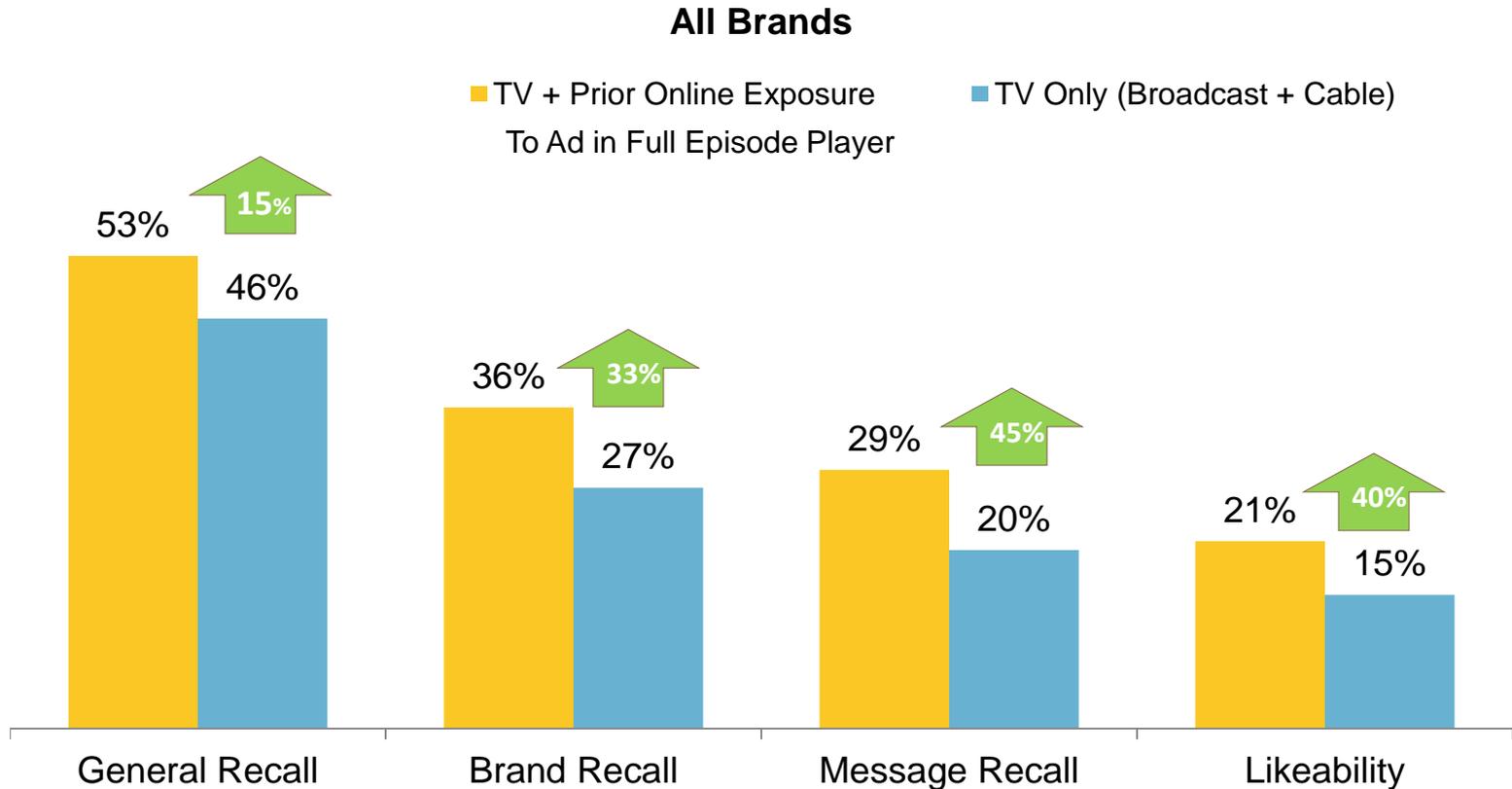
# Brand Recall of Ads on TV is Improved Through Duplication Online

- Prior Exposure to Ad in Online Formats Improves Brand Recall on TV



# Digital Multiplier Effect: Previous Ad Exposure in Full Episode Player Improves Effectiveness of TV Ads

- Duplicated Reach Lifts Brand Impact of TV Ads by Double Digits



\*Online includes digital video only

Standard TV includes TV ads on both cable and broadcast networks.  
 Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Green arrows indicate a positive difference at >90% confidence  
 TV data based on responses up to 1 day post-ad stream; Based on exposures to Video Ads in FEPs in the previous 7 days.  
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# Prior Exposure to Full Episode Online Video Ads Makes TV More Effective Across Demos

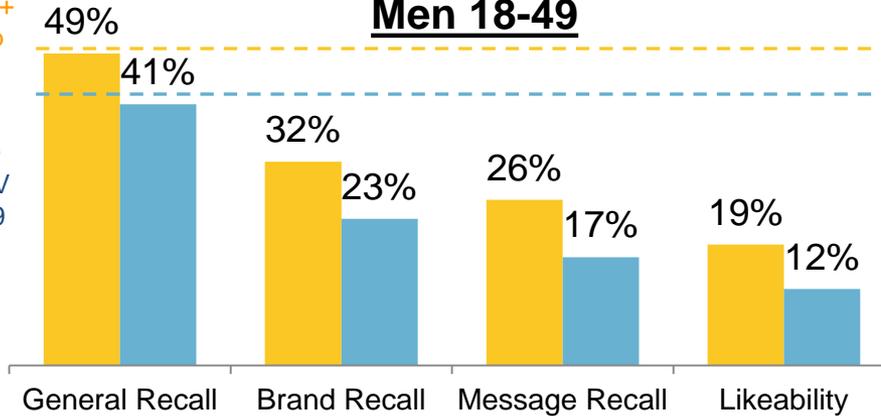


■ TV + Prior Online Video Ad Exposure in Full Episode

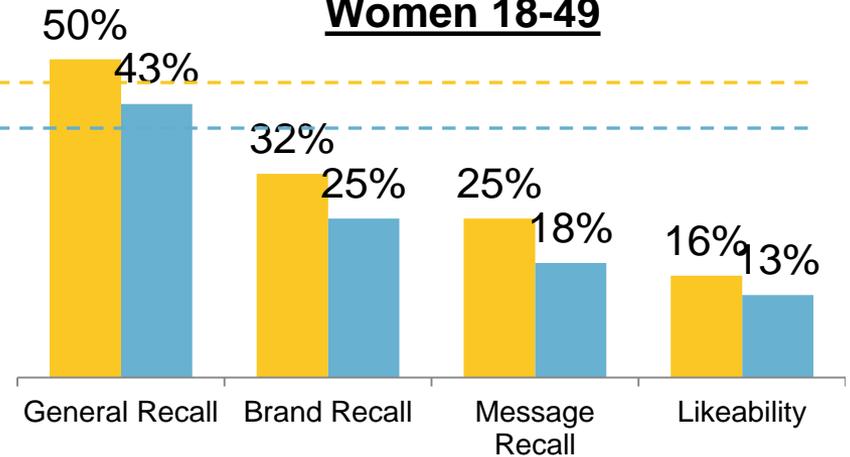
■ TV Commercials Only (Broadcast + Cable)

**49%**  
A18-49  
Avg TV+  
Full Ep  
Video

## Men 18-49



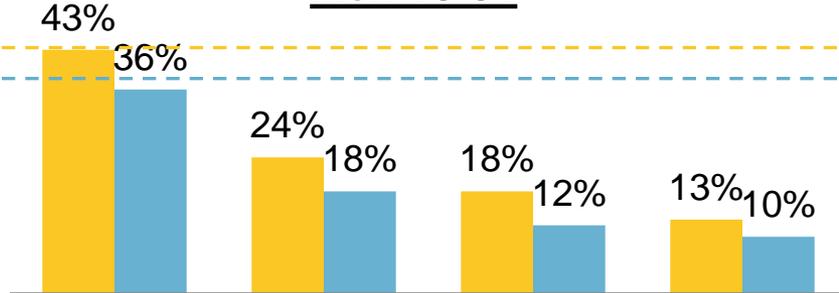
## Women 18-49



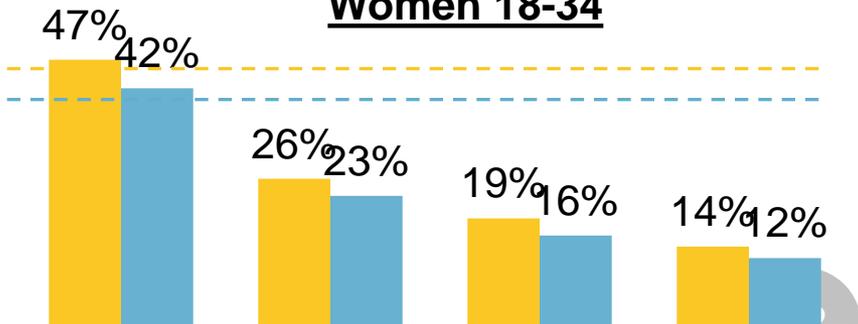
**42%**  
Avg. TV  
A18-49

**45%**  
A18-34  
Avg TV+  
Full Ep  
Video

## Men 18-34



## Women 18-34



**39%**  
Avg. TV  
A18-34

Standard TV includes TV ads on both cable and broadcast networks.

Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+

Green arrows indicate a positive difference at >90% confidence

TV data based on responses up to 1 day post-ad stream; Based on exposures to Video Ads in FEPs in the previous 7 days.

Based on Video Ad exposure before TV ad exposure.

Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary.

700 Brands were included in FEP v TV data and 15 brands for SF vs. TV data.

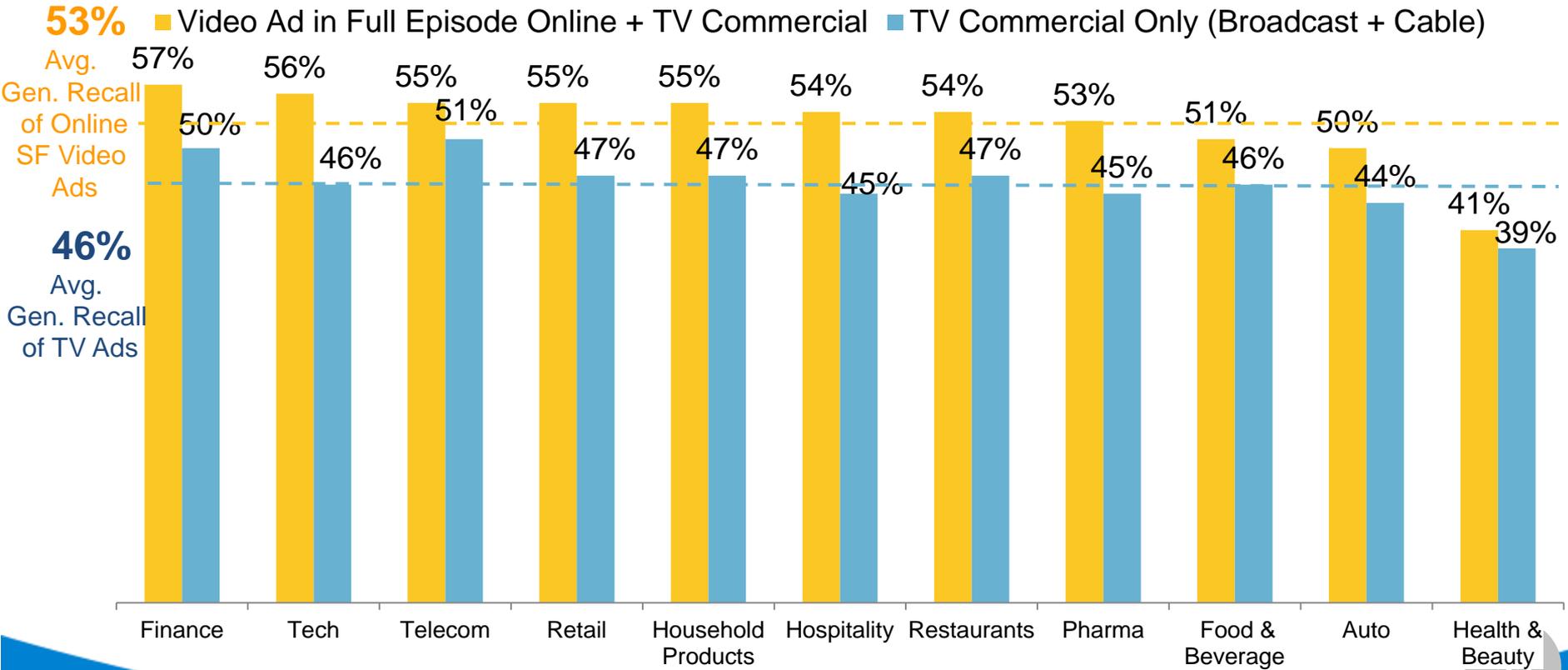


# Across Ad Verticals, Prior Exposure to Full Episode Video Ads Improves General Recall of TV Commercials



- Finance, Tech, Telecom, Retail and Household Products Benefit Most From Duplication in Full Episodes Online

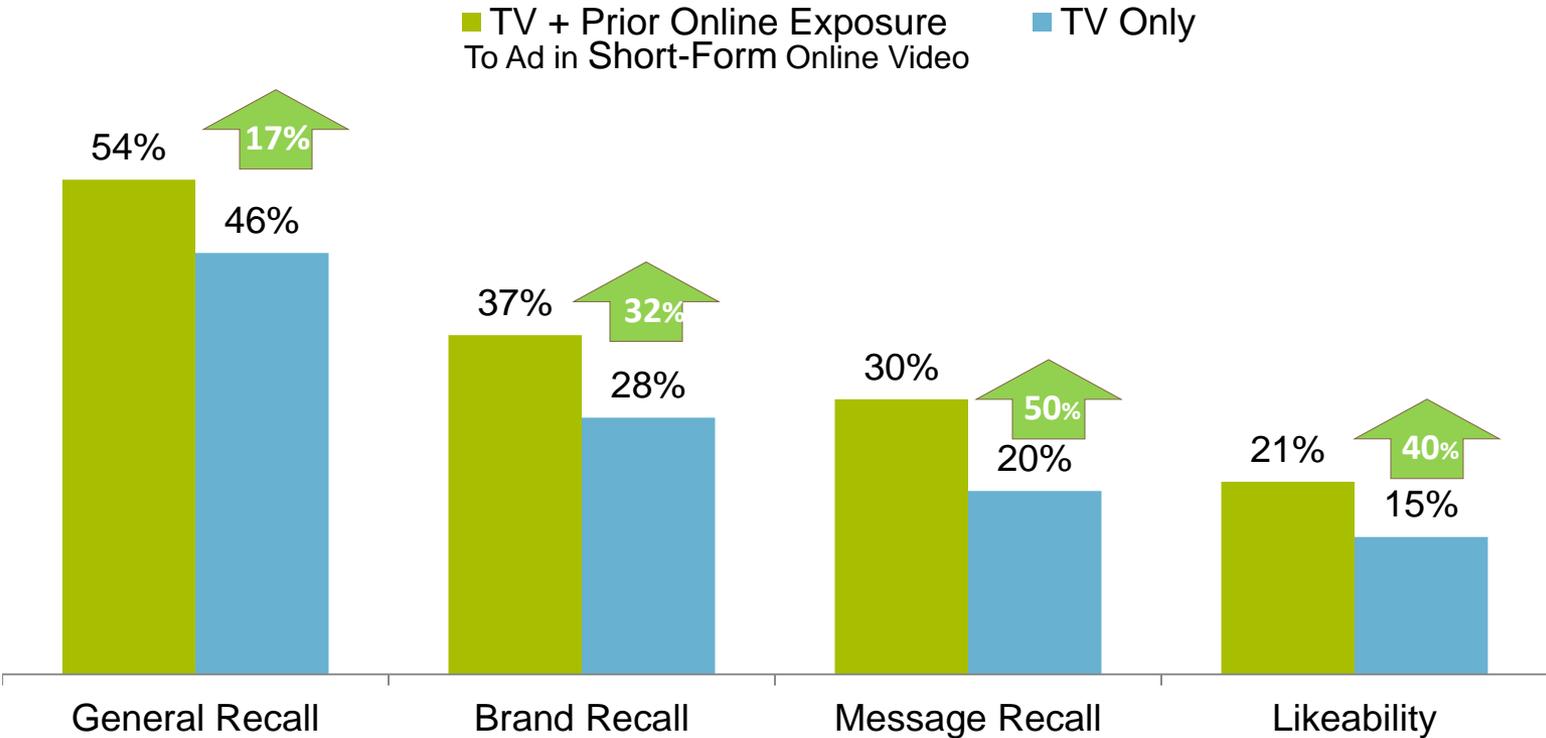
*General Recall Across Ad Verticals, Adults 18+*



*Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Online Formats and TV across Ad Verticals are available in slides in the appendix.*

# Digital Multiplier Effect: Previous Ad Exposure in Short Form Online Video Improves Effectiveness of TV Ads

## All Brands



Standard TV includes TV ads on both cable and broadcast networks.  
 Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Green arrows indicate a positive difference at >90% confidence  
 TV data based on responses up to 1 day post-ad stream; Based on exposures to Video Ads in FEPs in the previous 7 days.  
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# Prior Exposure to Short Form Online Video Ads Makes TV More Effective Across Demos



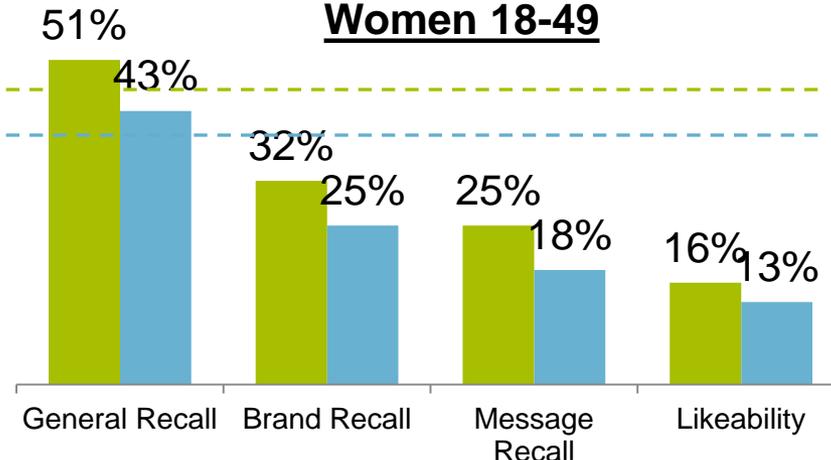
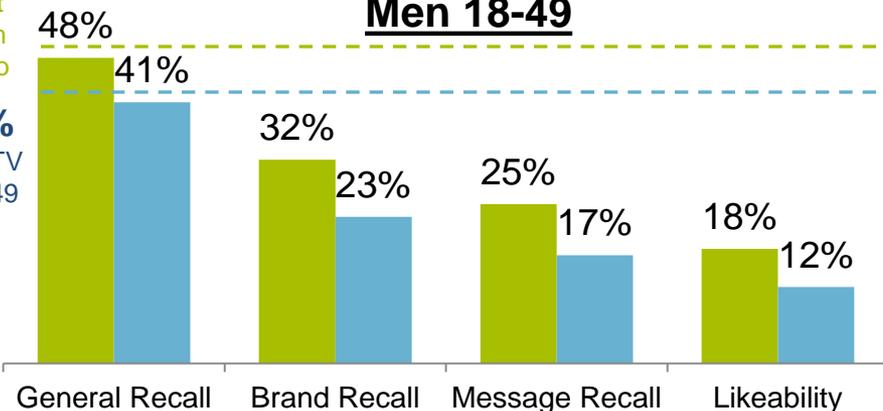
**49%**  
A18-49  
Avg TV+  
Short  
Form  
Video

■ TV + Prior Online Video Ad Exposure  
in Short Form Video

■ TV Commercials Only (Total)

## Men 18-49

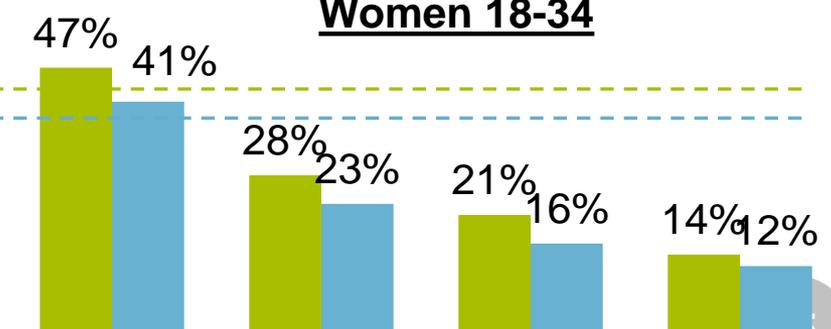
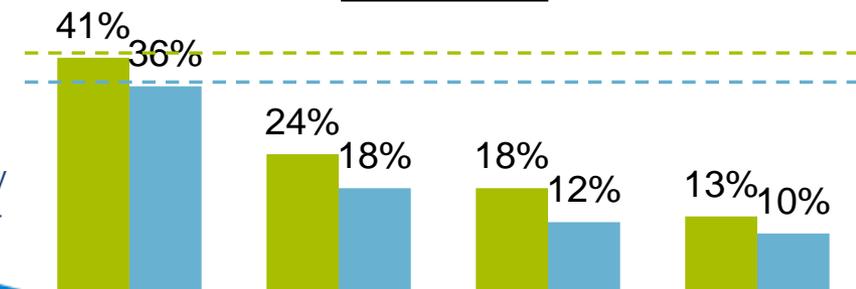
## Women 18-49



**43%**  
A18-34  
Avg TV+  
Short  
Form  
Video

## Men 18-34

## Women 18-34



Standard TV includes TV ads on both cable and broadcast networks.  
Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
Green arrows indicate a positive difference at >90% confidence  
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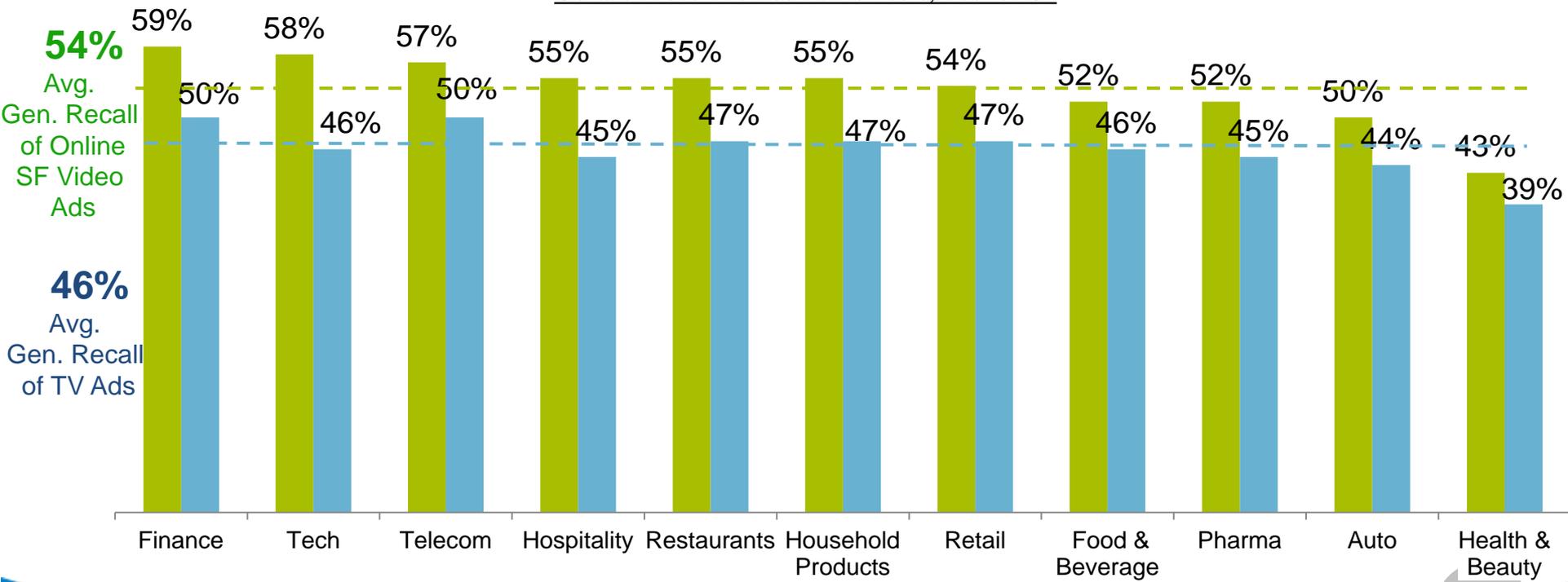
# Across Ad Verticals, Prior Exposure to Short Form Online Video Ads Improves General Recall of TV Commercials



- Finance, Tech, Telecom, Hospitality and Restaurants Benefit Most From Duplication in Short Form Video Online

■ Short Form Online Video Ad + TV Commercial   ■ TV Commercial Only (Broadcast + Cable)

*General Recall Across Ad Verticals, Adults 18+*

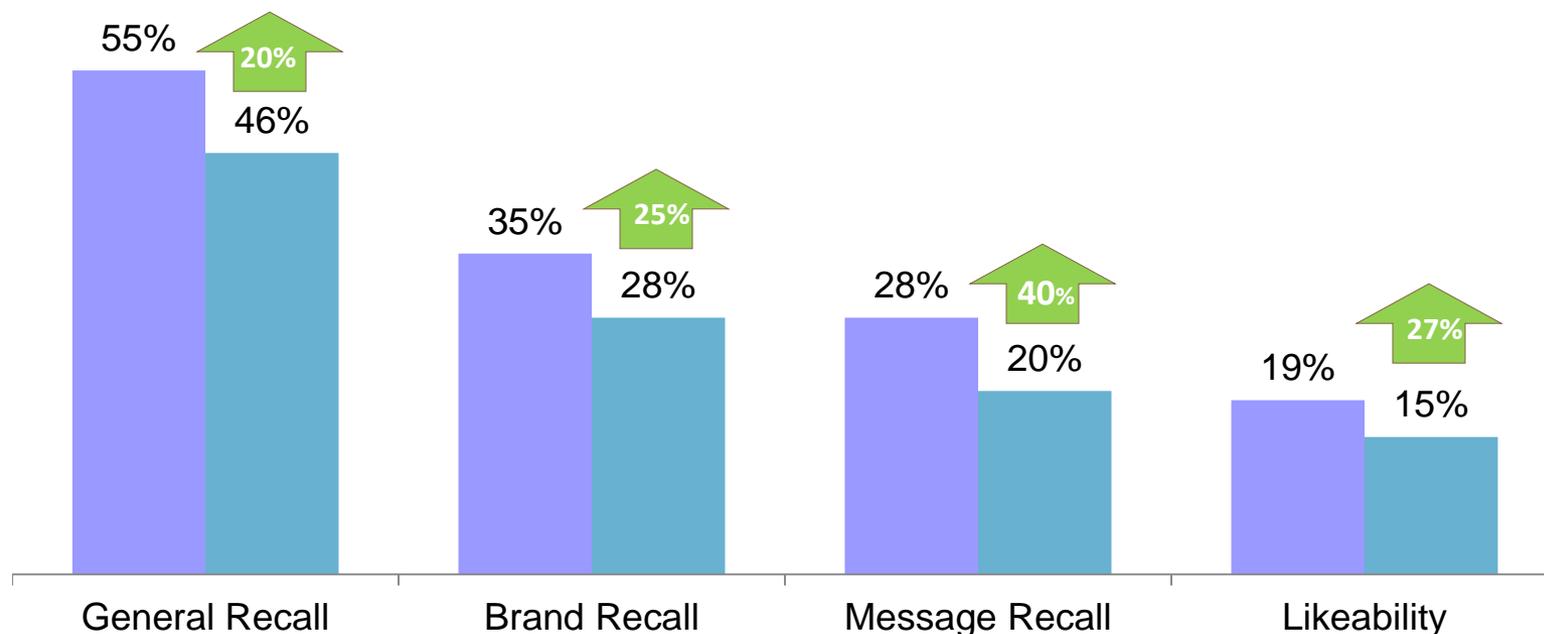


Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Online Formats and TV across Ad Verticals are available in slides in the appendix.

# Digital Multiplier Effect: Viewers Who Saw a Banner Ad Online Before the TV Ad Showed a Lift Over TV Only

## Across Verticals and Brands

■ TV + Prior Online Exposure To Display Ad    ■ TV Only



# Duplication: Prior Exposure to Display Ads (Non-Video Online) Makes TV More Effective



■ TV + Prior Display (Non-Video) Online Ad Exposure

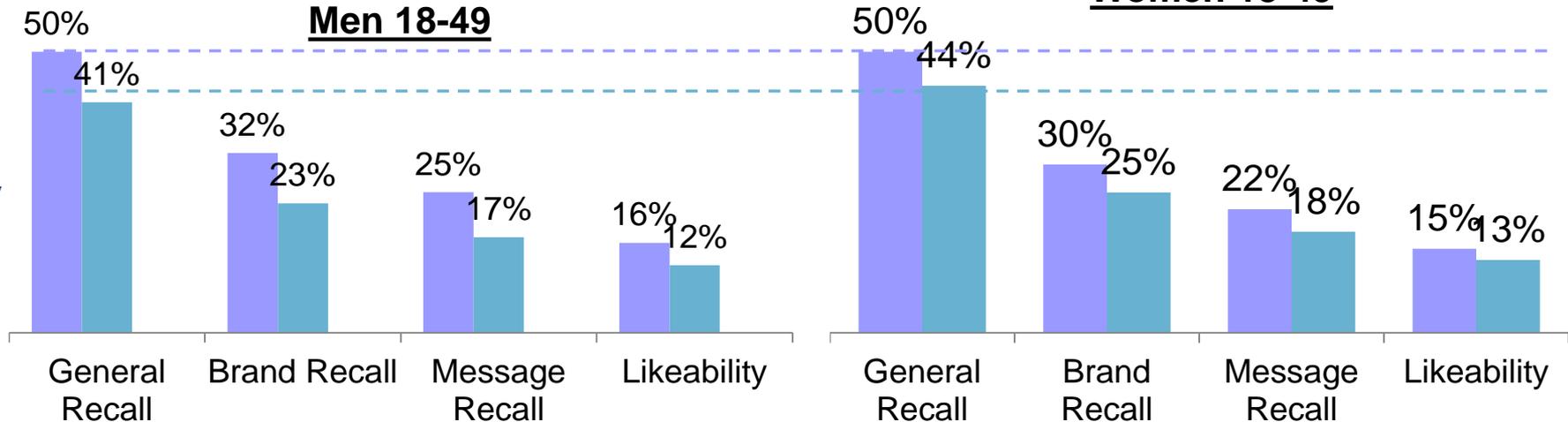
■ TV Commercials Only (Total)

50%  
Avg TV+ Display A18-49

43%  
Avg. TV A18-49

## Women 18-49

## Men 18-49

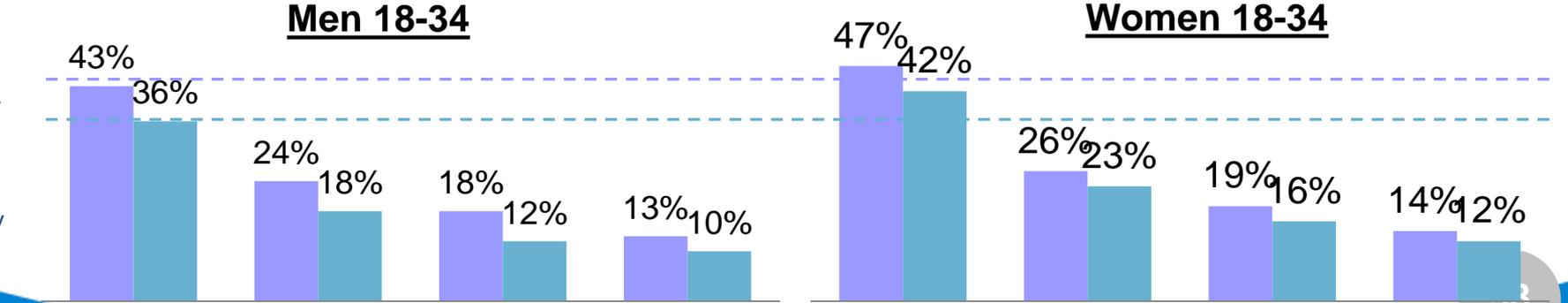


45%  
Avg TV+ Display A18-34

39%  
Avg. TV A18-34

## Men 18-34

## Women 18-34



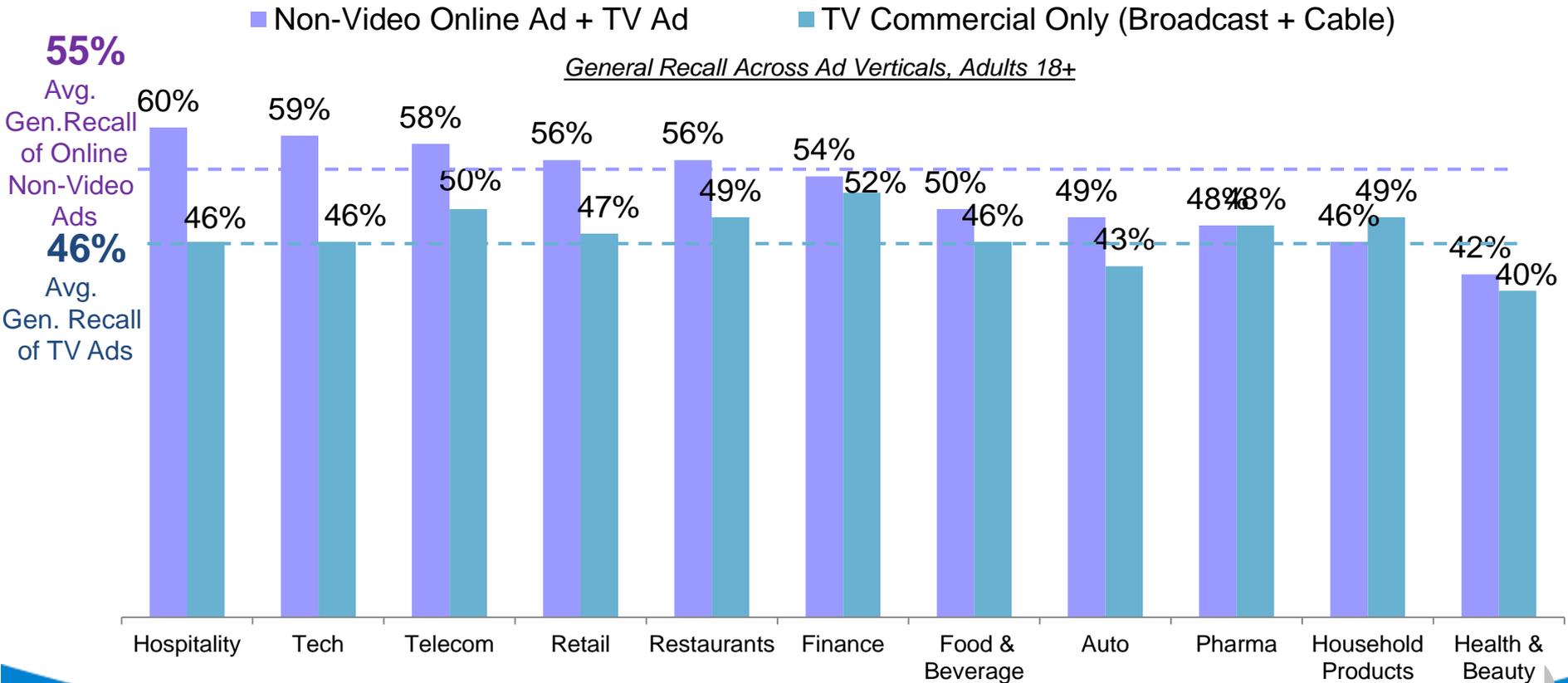
Standard TV includes TV ads on both cable and broadcast networks.  
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# Across Most Ad Verticals, Prior Exposure to Online Display Ads Improves General Recall of TV Commercials



- Hospitality, Tech, Telecom, Retail and Restaurants Benefit Most From Duplication Online



Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Online Formats and TV across Ad Verticals are available in slides in the appendix.

Standard TV includes TV ads on both cable and broadcast networks.

Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+

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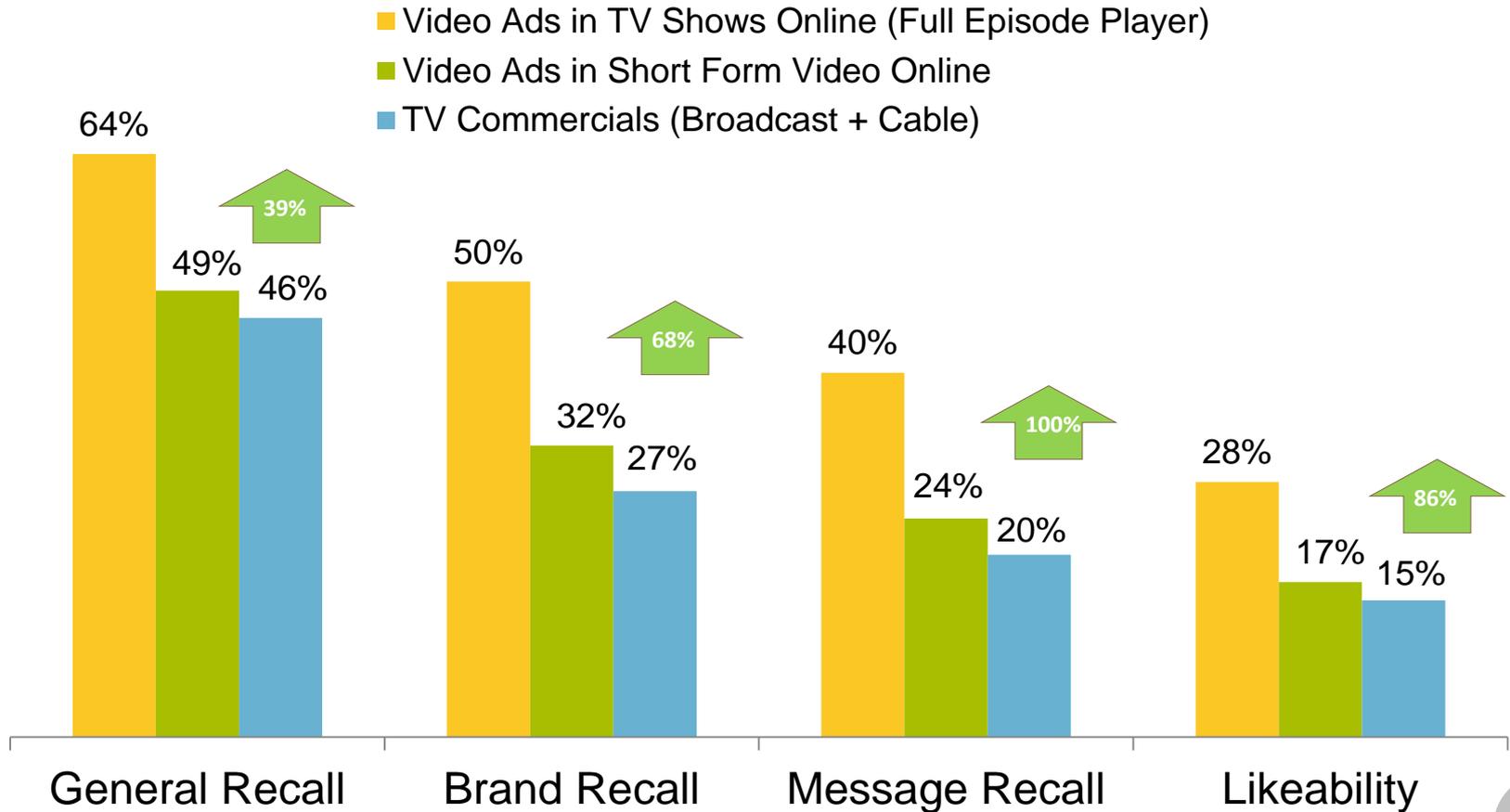




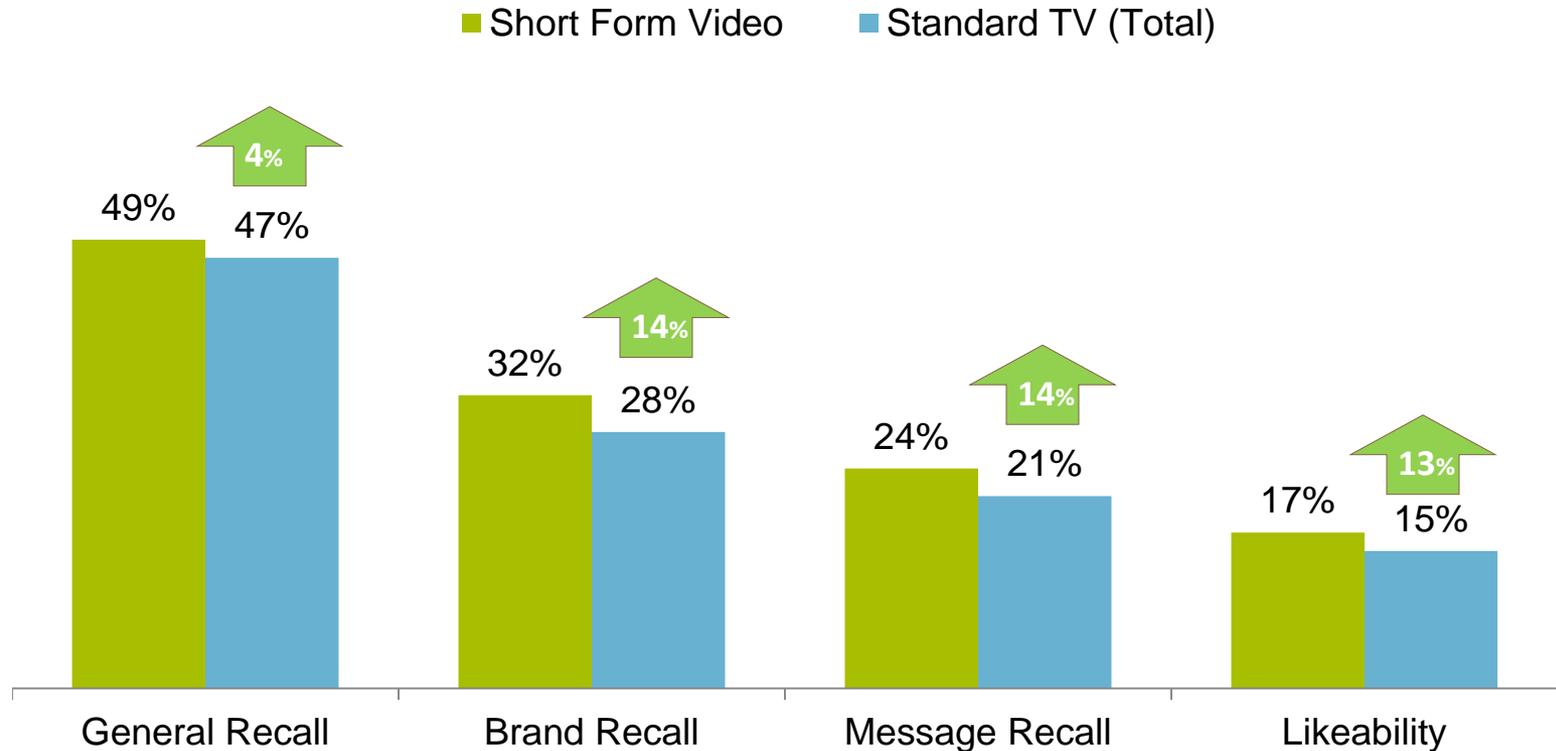
# Video Brand Effect Digital is More Effective



# Online Video Ads Outperform TV Ads on All Measured Effectiveness Metrics

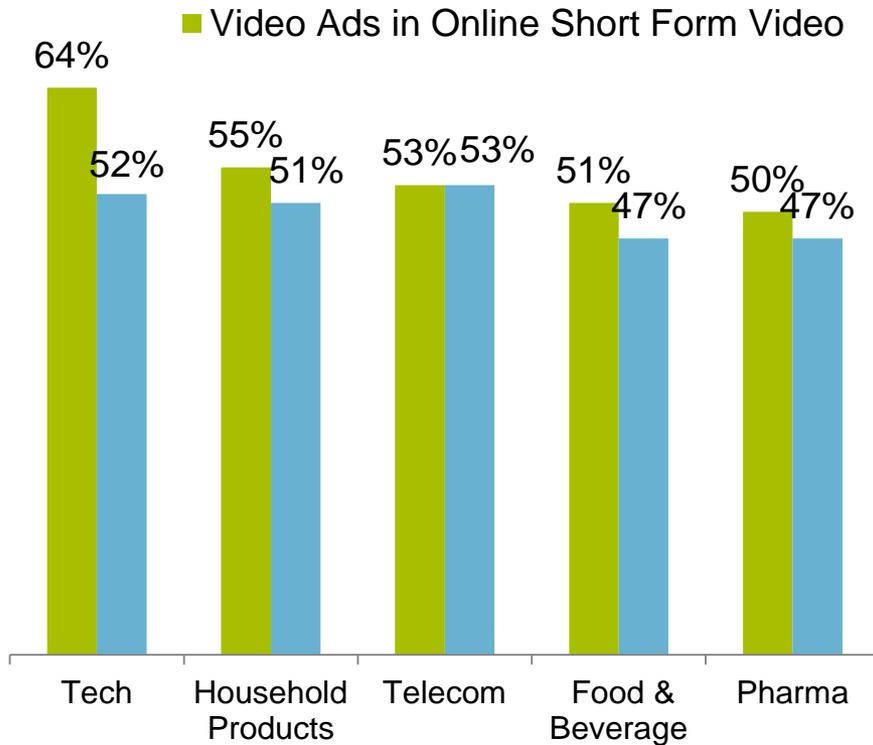


# Like Ads in Short Form (up to 24 Min.) Online Video Outperform Their TV Counterparts



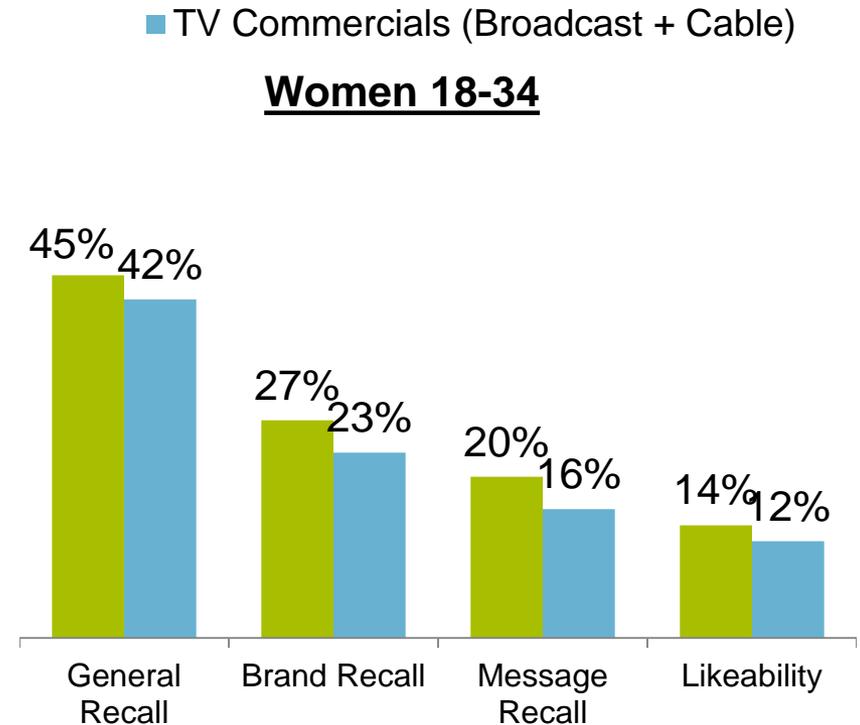
# Online Video Ads During Short Form Videos are Most Effective...

...in These Ad Verticals:



Top Ad Verticals for Ad Effectiveness  
(General Recall), Adults 18+

...and in This Demo:



Top Demo for Ad Effectiveness Metrics  
(by largest difference between short form video and TV)

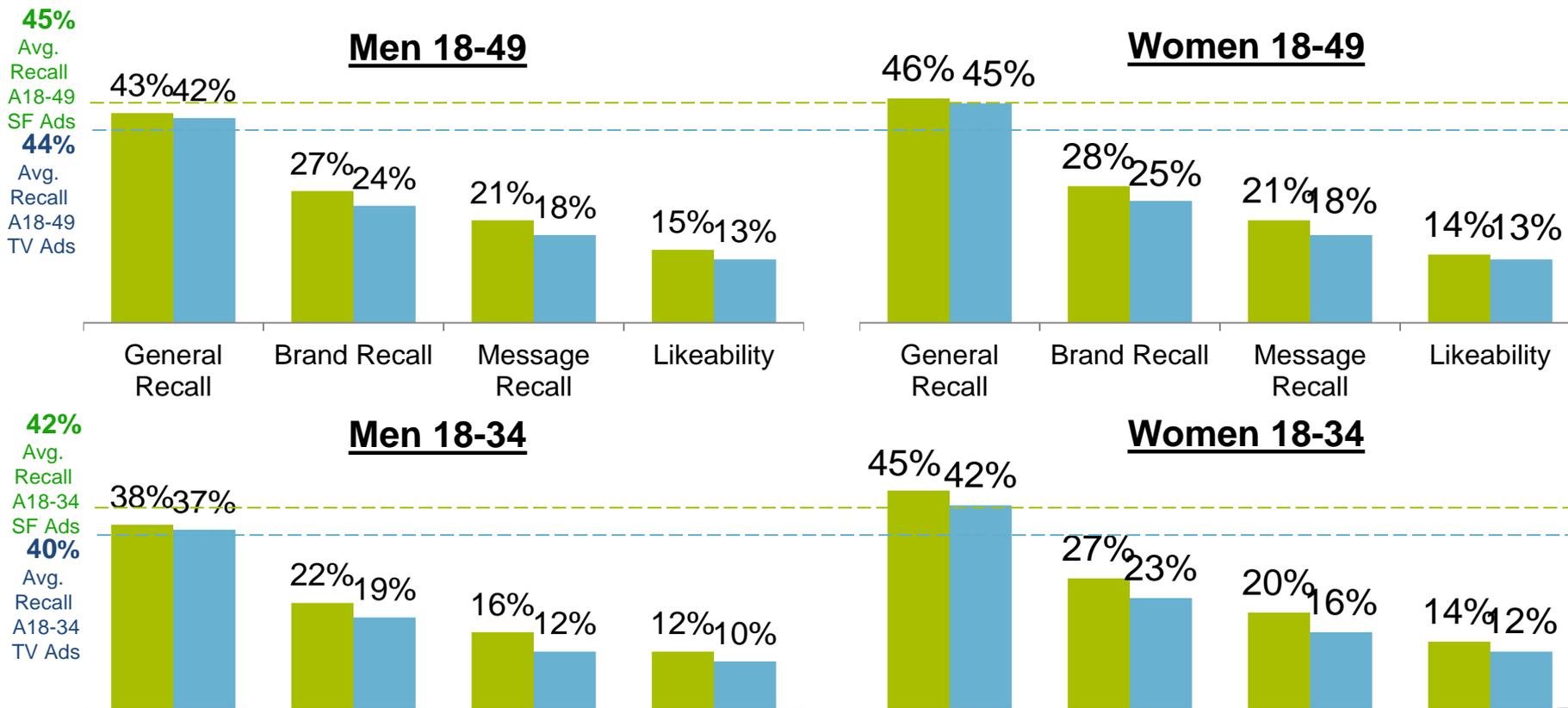
Note: More ad effectiveness metrics across demos, genres, verticals and online formats are available in the appendix.

Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
Online & TV data based on responses up to 1 day post-ad exposure  
Limited to the same brands that streamed online and aired on TV  
during the same period; specific creative executions may vary

# Short Form Online Video is More Effective Than TV Across Demos

■ Online Video Ad in Short Form Video

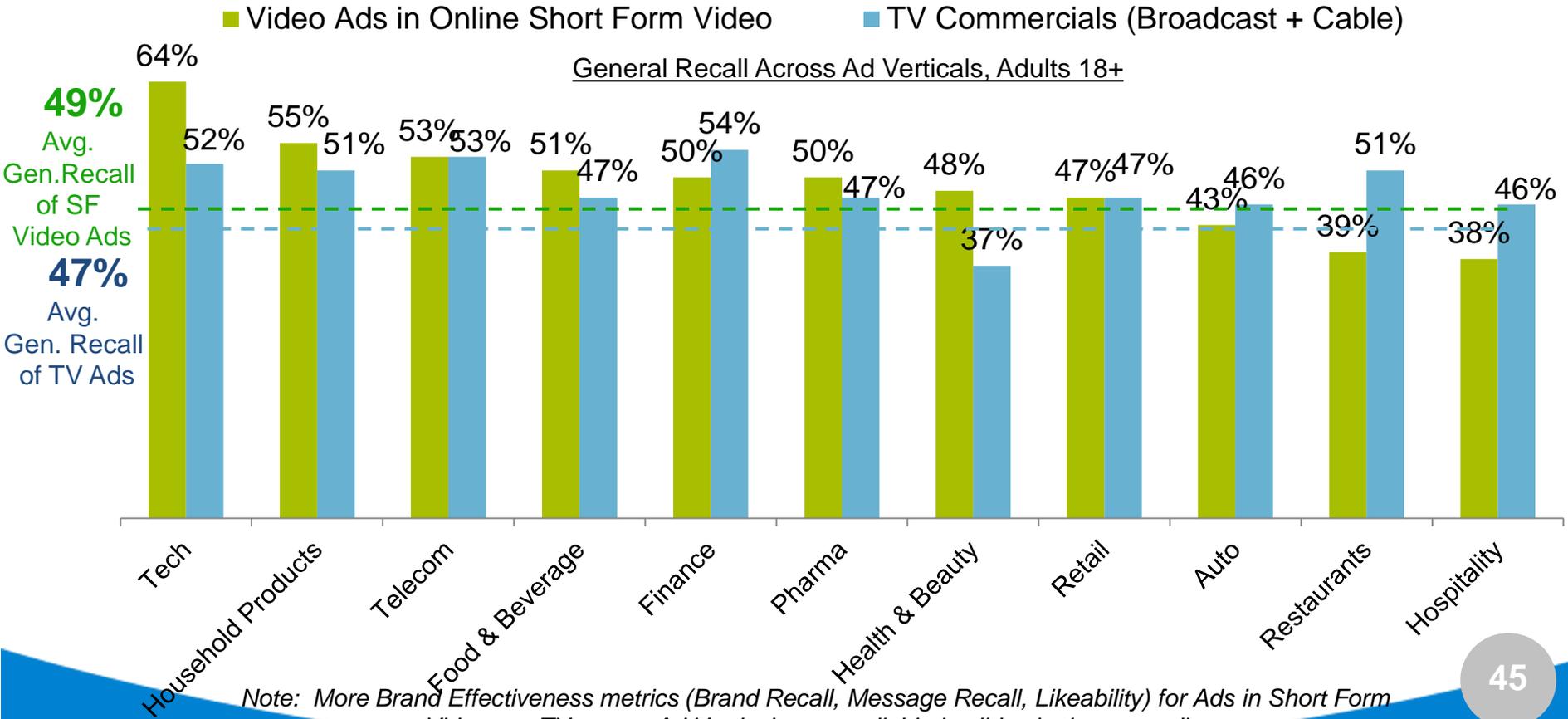
■ Standard TV Commercial (Total)



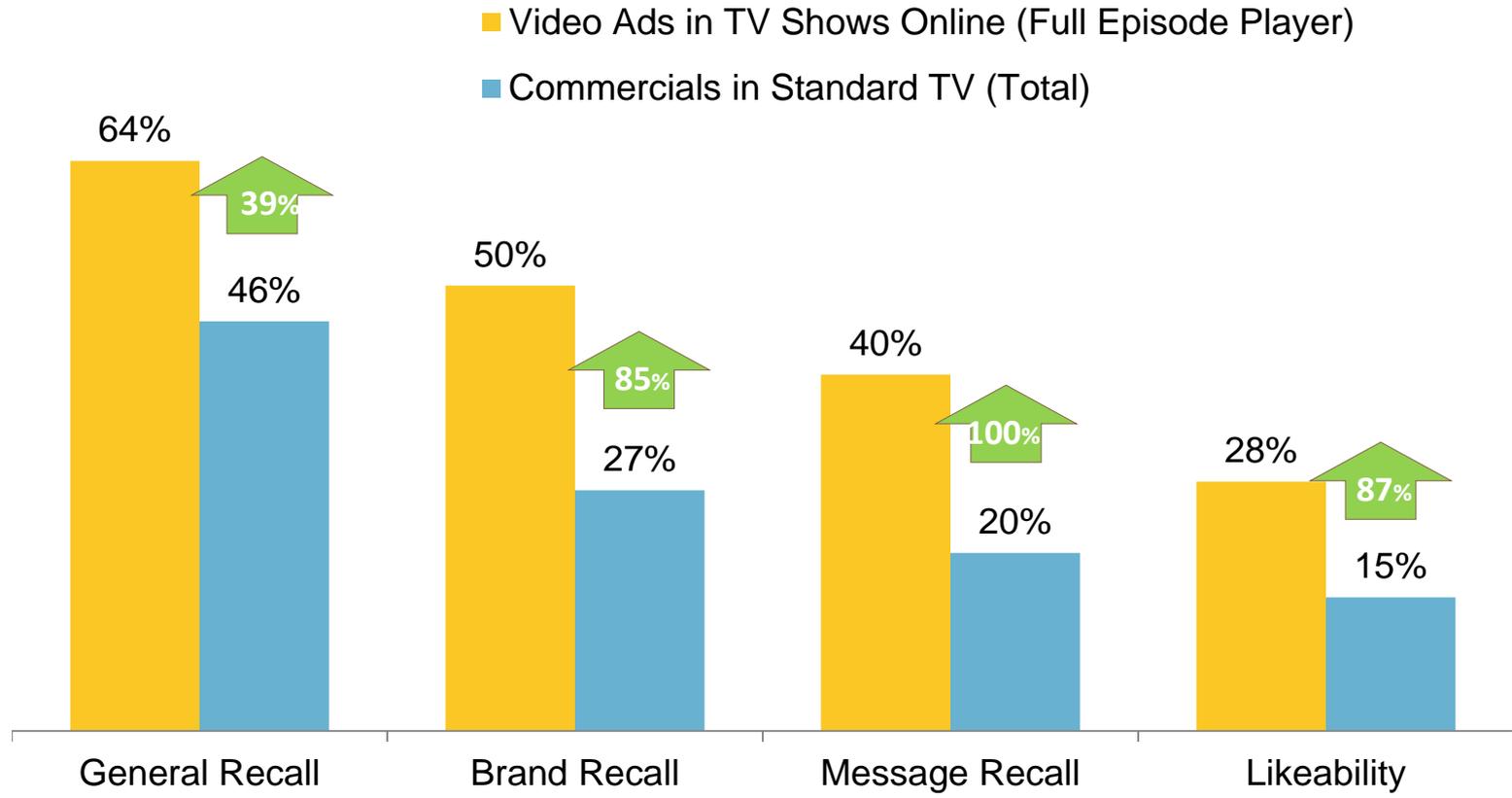
Note: More slides are available in the appendix that show Short Form vs. TV Brand Effect across the following demos: A18+, M18+, W18+, A18-49, A18-34, A35-64, M35-64, W35-64

# Across Several Ad Verticals, Short Form Online Video Ads Are More Memorable Than TV Ads

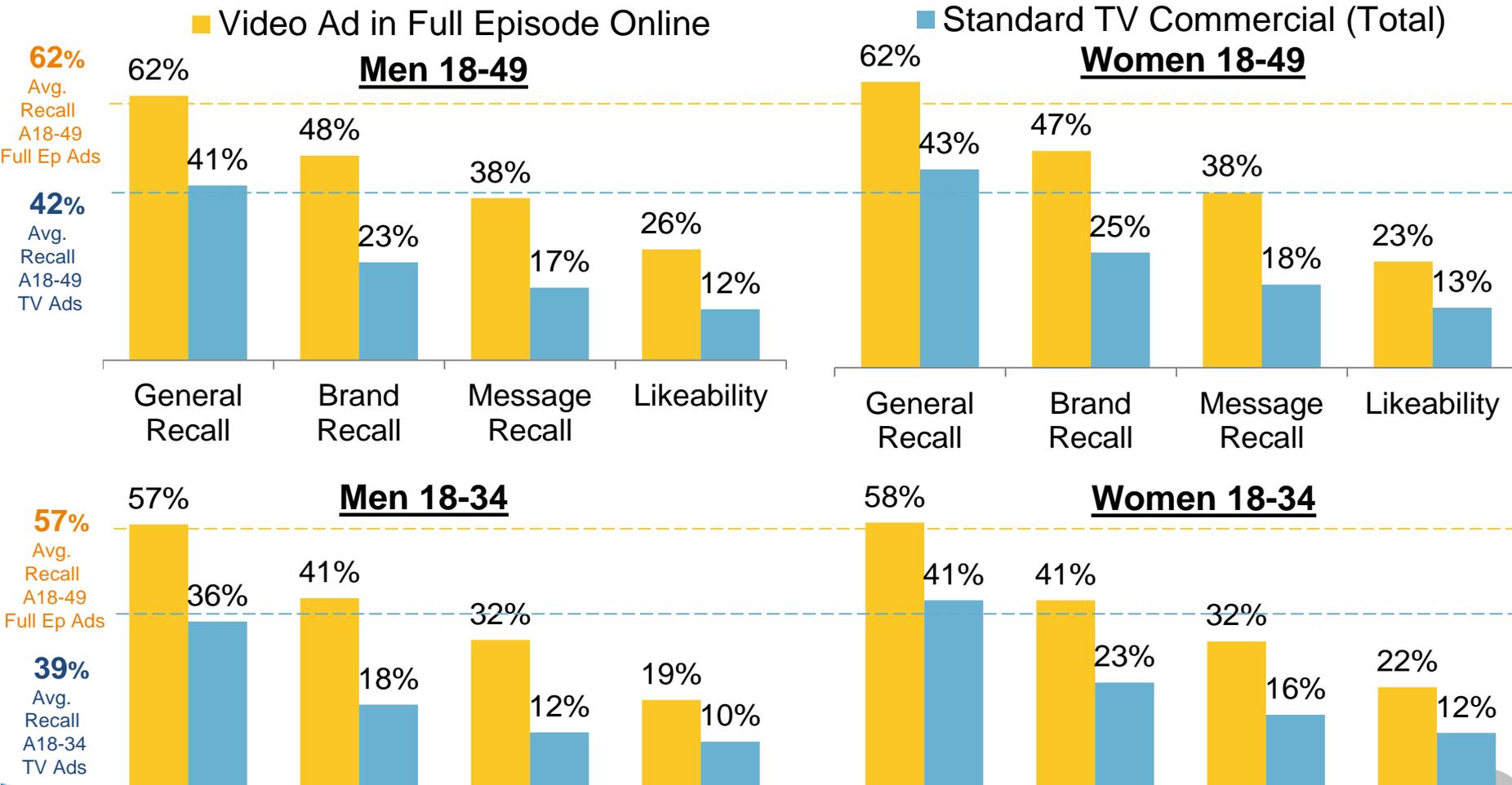
- Tech, Household Products, Telecom, Food & Beverage, Pharma Verticals Are Most Effective
- Tech and Health & Beauty Video Ads Online Significantly Outperform TV



# Video Ads in Full Episode Players Are More Effective Than TV Commercials



# Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

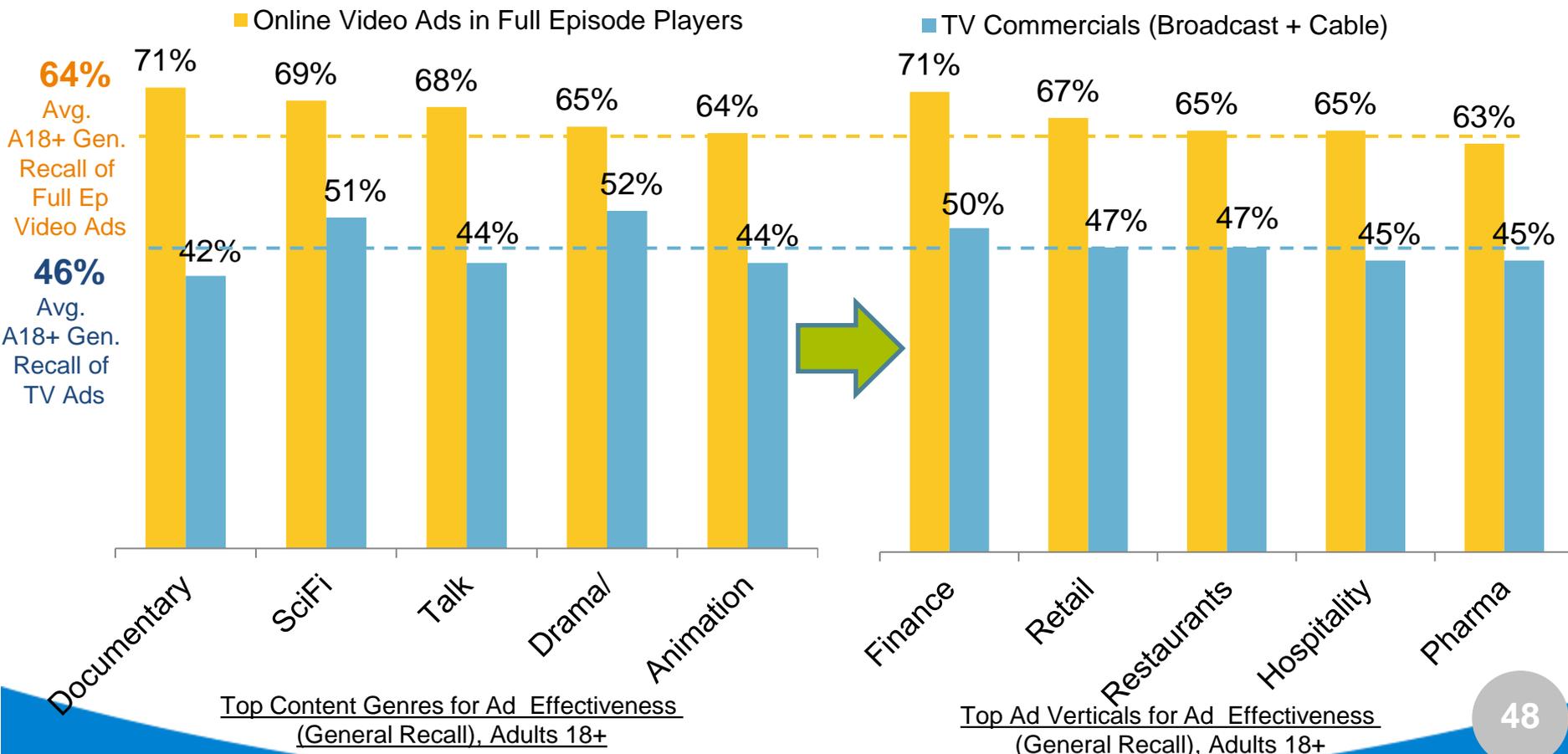


Note: More slides are available in the appendix that show Full Episodes Online vs. TV Brand Effect across the demos: A18+, M18+, W18+, A18-49, A18-34, A35-64, M35-64, W35-64

# Online Video Ads During Full Episodes are Most Effective...

....in These Genres:

...and in These Ad Verticals:

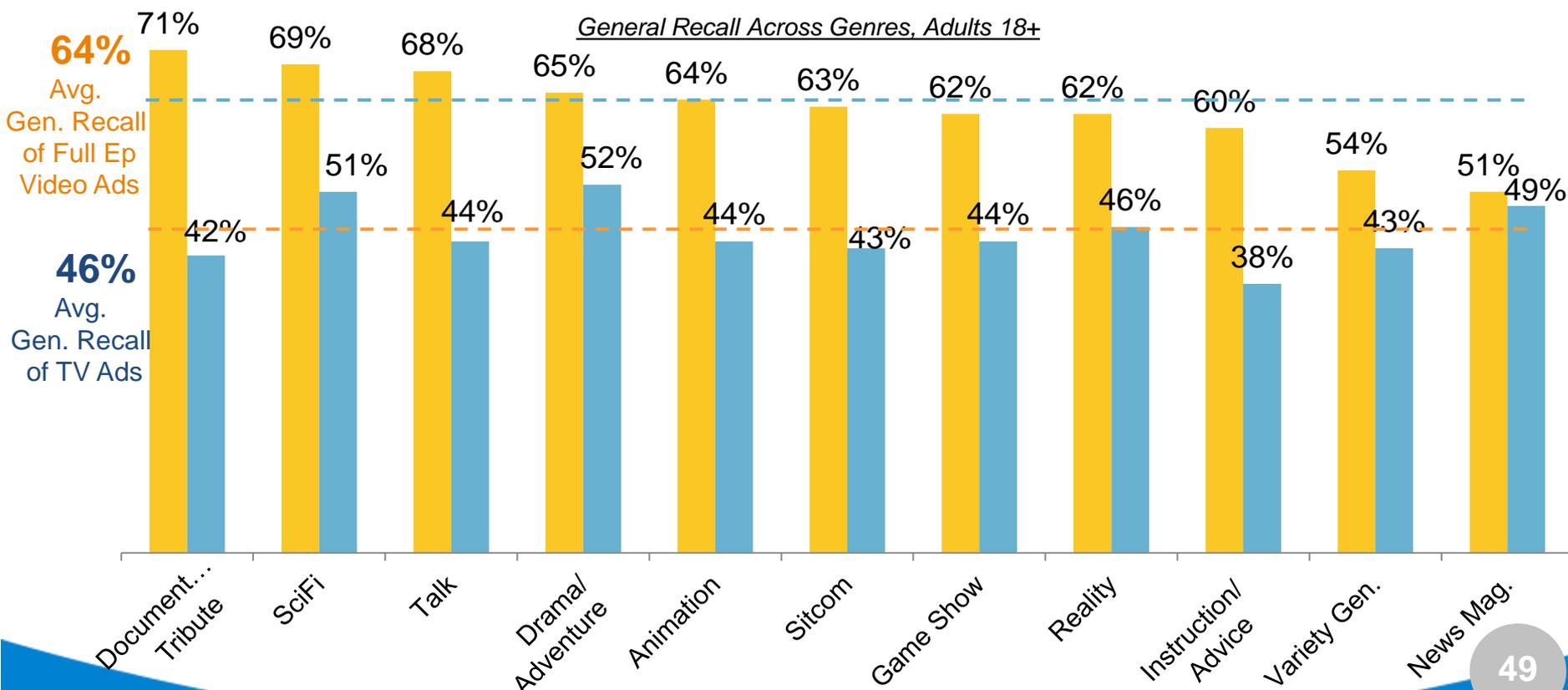


Note: More Brand Effect metrics (Brand Recall, Message Recall, Likeability) for Ads in Full Episodes Online vs. TV across Genres and Ad Verticals are available in the appendix.

# Across Genres, Online Video Ads During Full Episodes Are More Memorable Than TV Ads

- About 2 in 3 Online Video Viewers Recall the Ads; Less Than Half of TV Viewers Recall Ads

■ Online Video Ads in Full Episode Players    ■ TV Commercials (Broadcast + Cable)

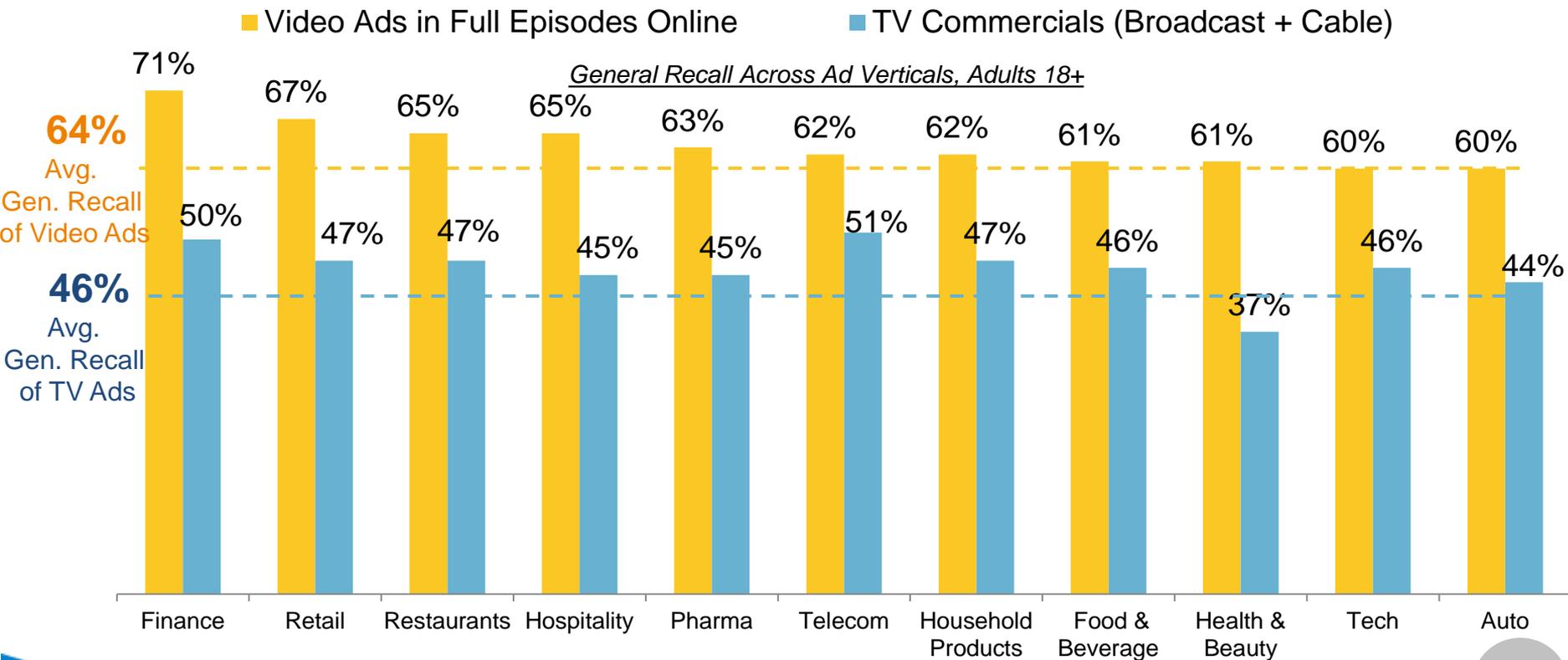


Note: More Brand Effect metrics (Brand Recall, Message Recall, Likeability) for Ads in Full Episodes Online vs. TV across Genres are available in slides in the appendix.

# Across Ad Verticals, Video Ads in Full Episodes Online Are More Memorable Than TV Commercials



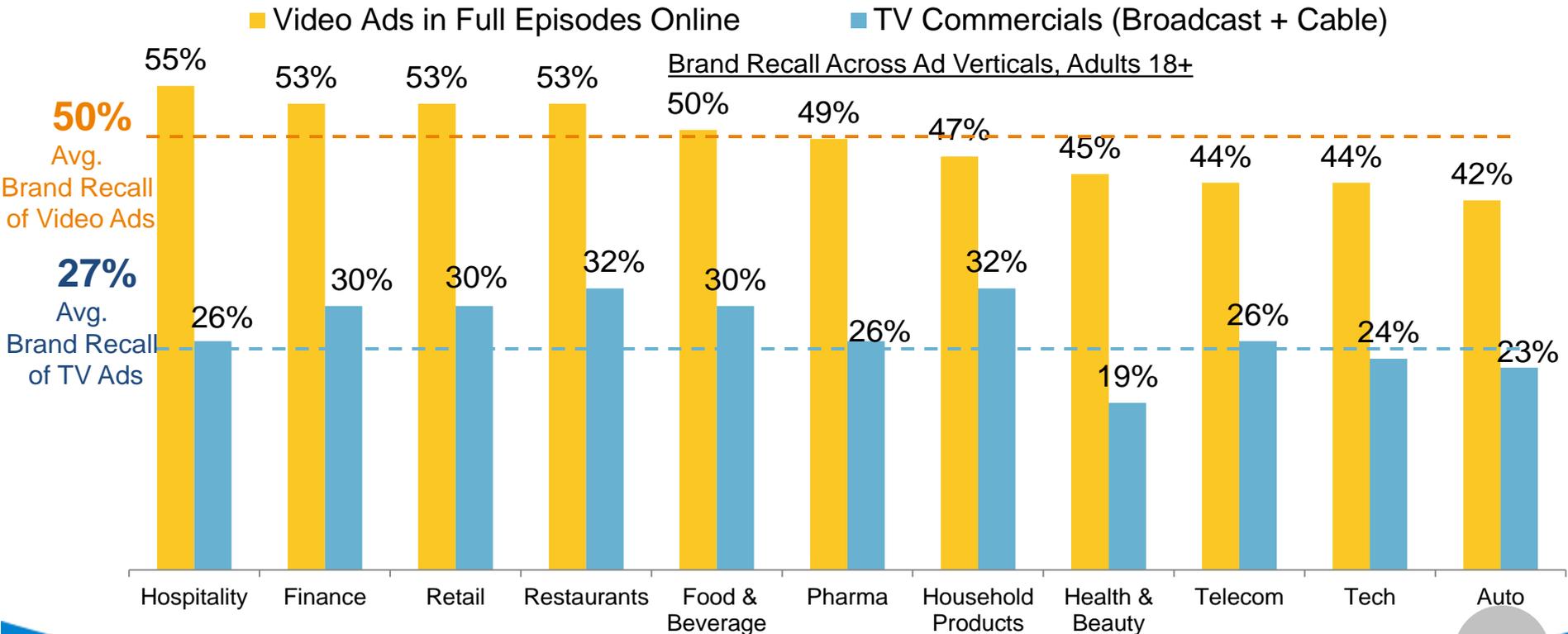
- Finance, Retail, Restaurants, Hospitality and Pharma are Most Effective Online
- Finance, Retail, Hospitality and Health & Beauty Video Ads Outperform TV by 20 Percentage Points or More



Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Full Episodes Online vs. TV across Ad Verticals are available in slides in the appendix.

# Across Ad Verticals, Brands Are More Memorable in Full Episodes Online Than on TV Commercials

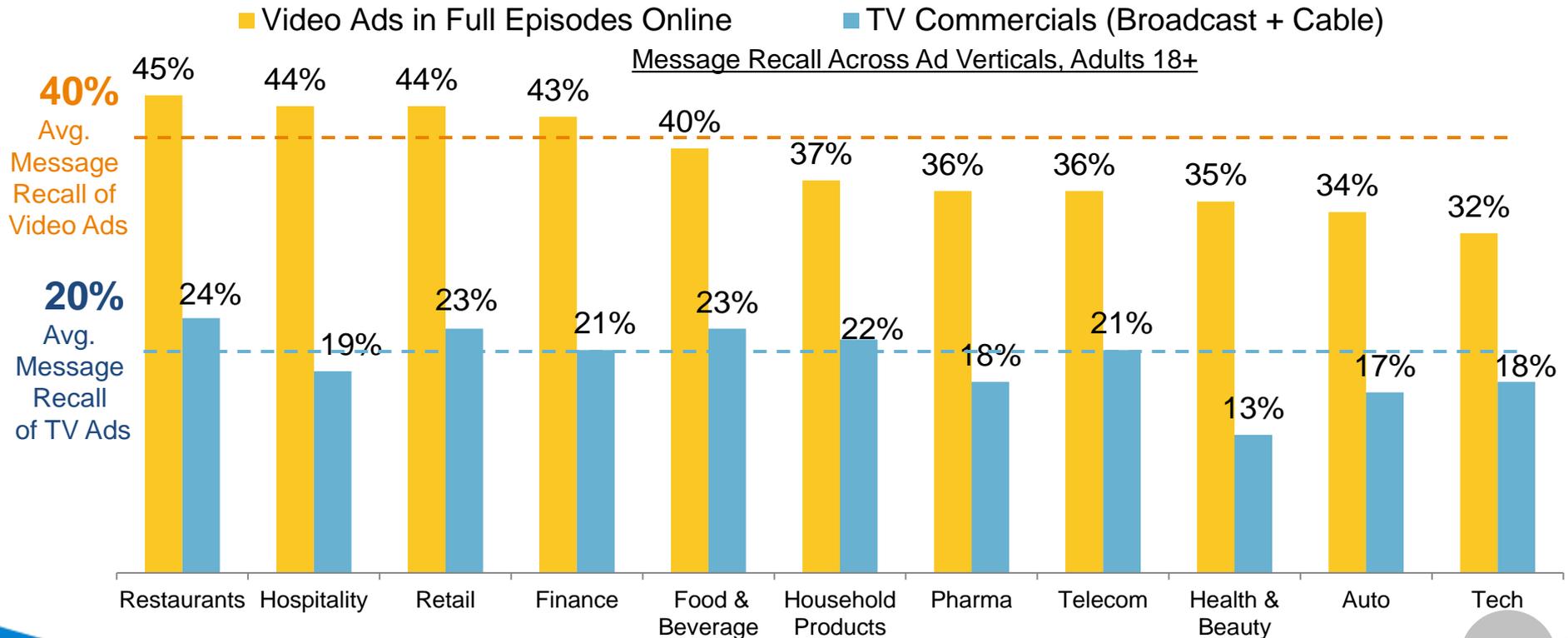
- Over Half Recall the Brand Advertised in Online Video for Hospitality, Finance, Retail, Restaurants and Food & Beverage
- Brand Recall Online is Twice That of TV for Hospitality and Health & Beauty Video Ads



Note: More ad effectiveness metrics across demos, genres, verticals and online formats are available in the appendix.

# Across Ad Verticals, Ad Messages Are More Memorable in Full Episode Online Than on TV

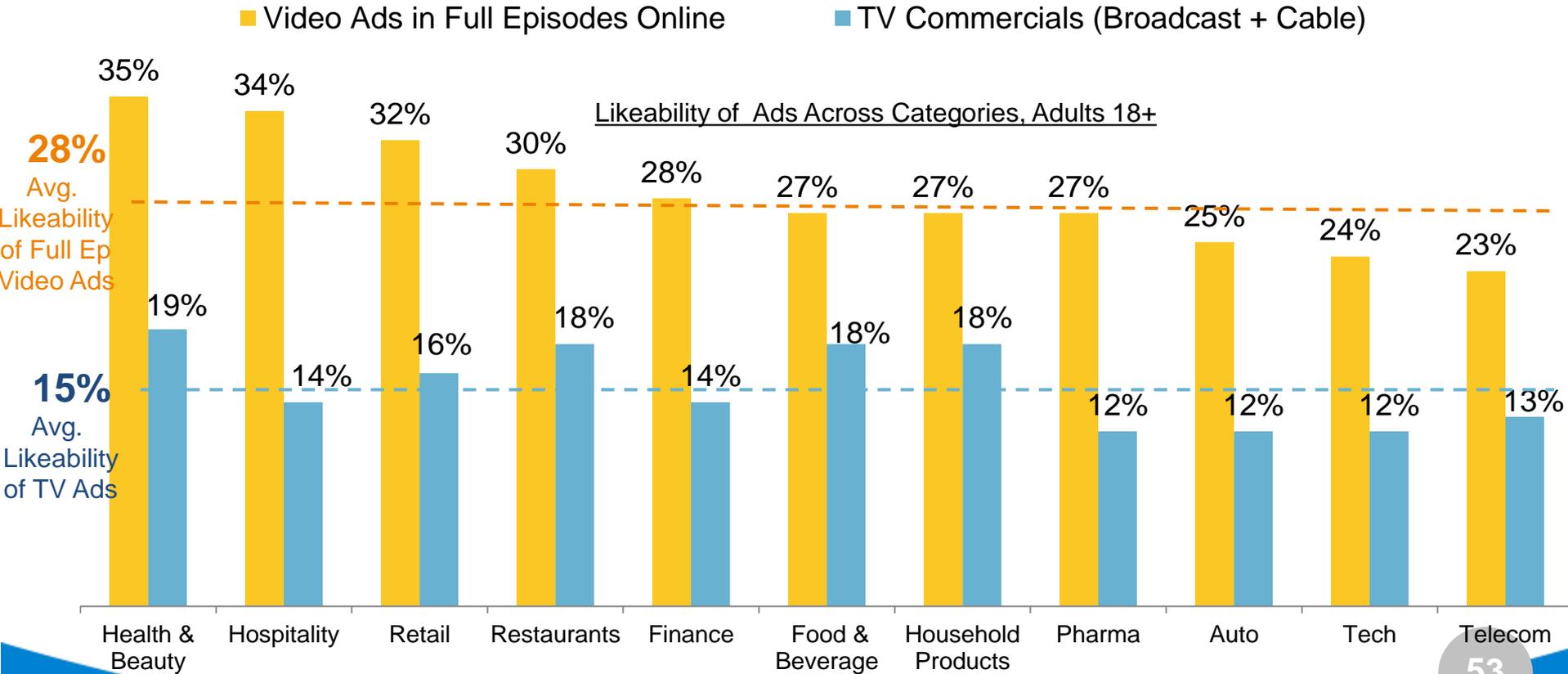
- More Than Twice as Many Recall Messages Online Than on TV for Hospitality, Finance, Health & Beauty



Note: More ad effectiveness metrics across demos, genres, verticals and online formats are available in the appendix.

# Across Ad Verticals, Video Ads Are More Likeable in Full Episodes Online Than on TV

- Online Video Ads are More Than Twice as Likeable Than on TV for Hospitality, Pharma and Auto



Note: More ad effectiveness metrics across demos, genres, verticals and online formats are available in the appendix.



# Video Brand Effect by Vertical CPG and Non-CPG



# Both CPG and Non-CPG Video Ads are More Effective in Full Episodes Online Than on TV

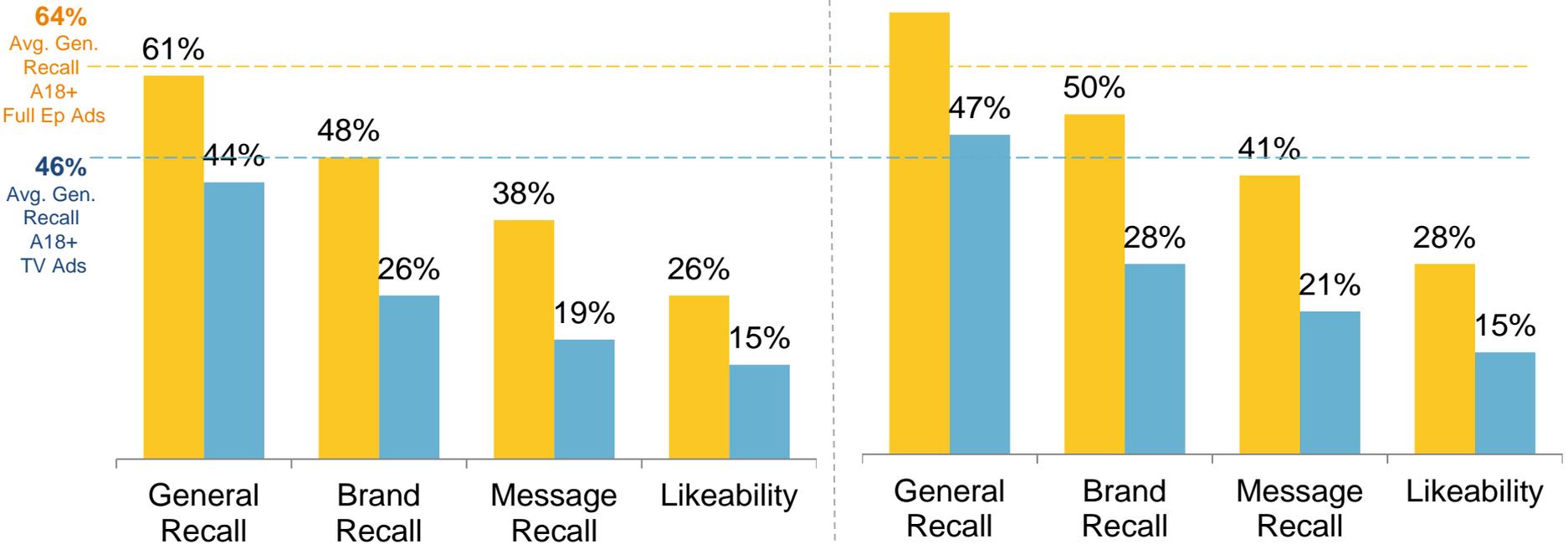
- About Two-Thirds of Full Episode Streamers Recall the Ad

## CPG Adults 18+

## Non-CPG Adults 18+

■ Video Ad in Full Episode Online

■ Standard TV Commercial (Total)



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

55

# CPG Video Ads are More Effective in Short Form Video Online Than on TV

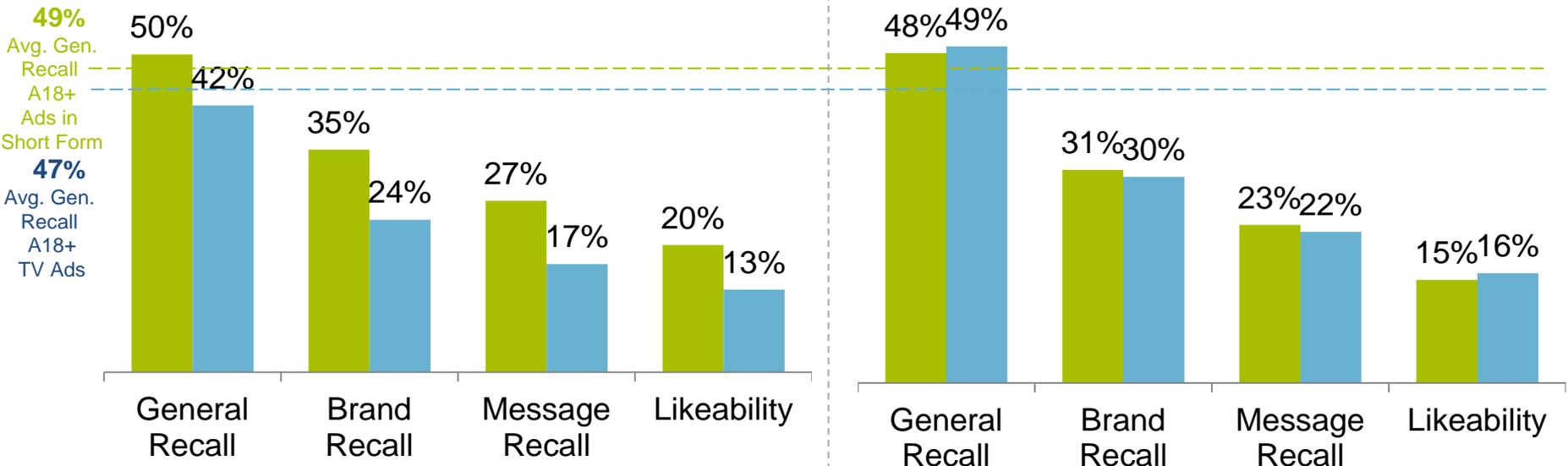
- About Half of Short Form Streamers Recall the Ad

## CPG Adults 18+

## Non-CPG Adults 18+

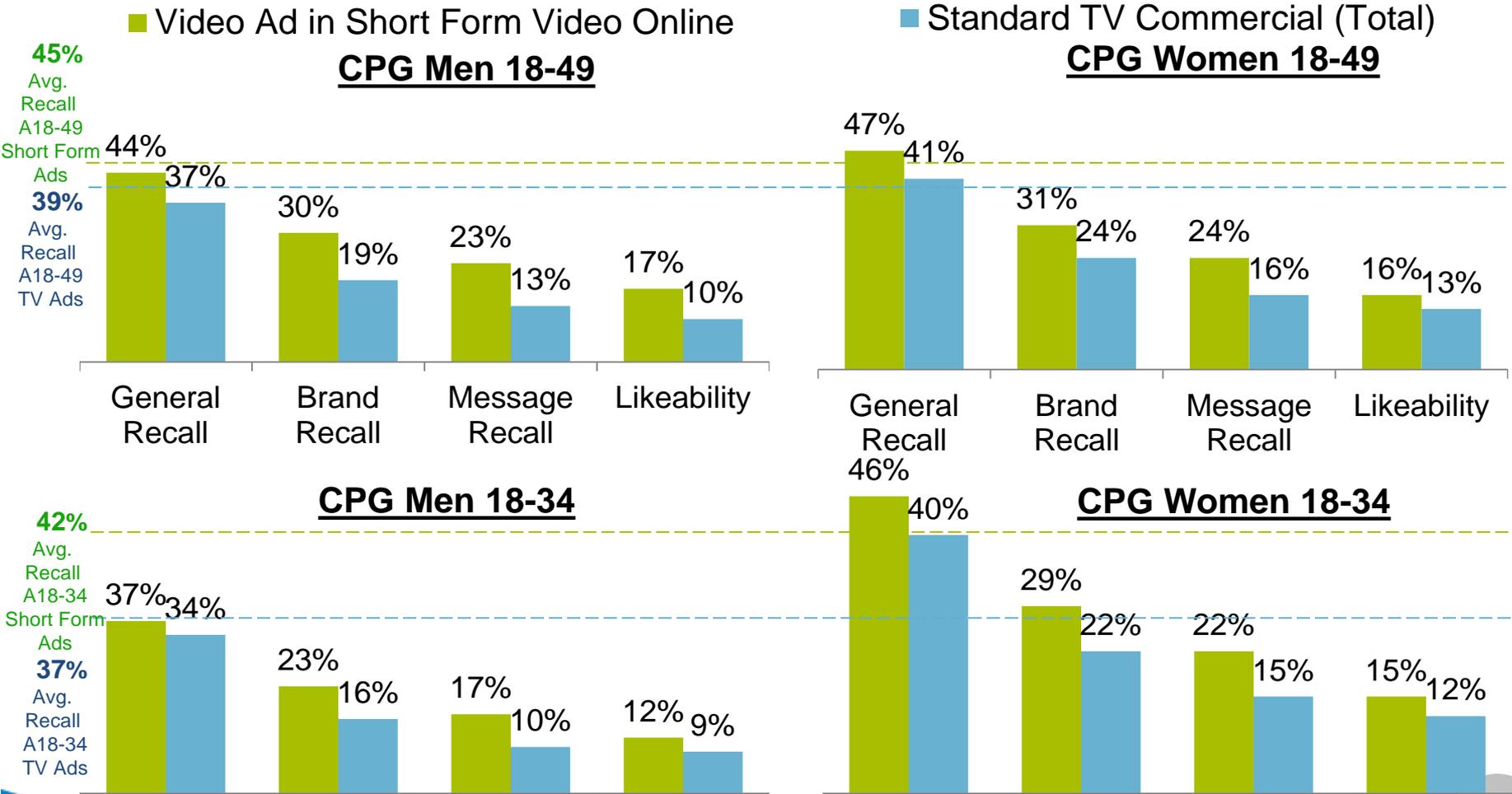
■ Video Ad in Short Form Video Online

■ Standard TV Commercial (Total)



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

# Across Demos, CPG Video Ads are More Effective in Short Form Videos Online Than on TV



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

# Across Demos, Non-CPG Video Ads are On Par with TV in Short Form Videos



■ Video Ad in Short Form Video Online

■ Standard TV Commercial (Total)

## Non-CPG Men 18-49

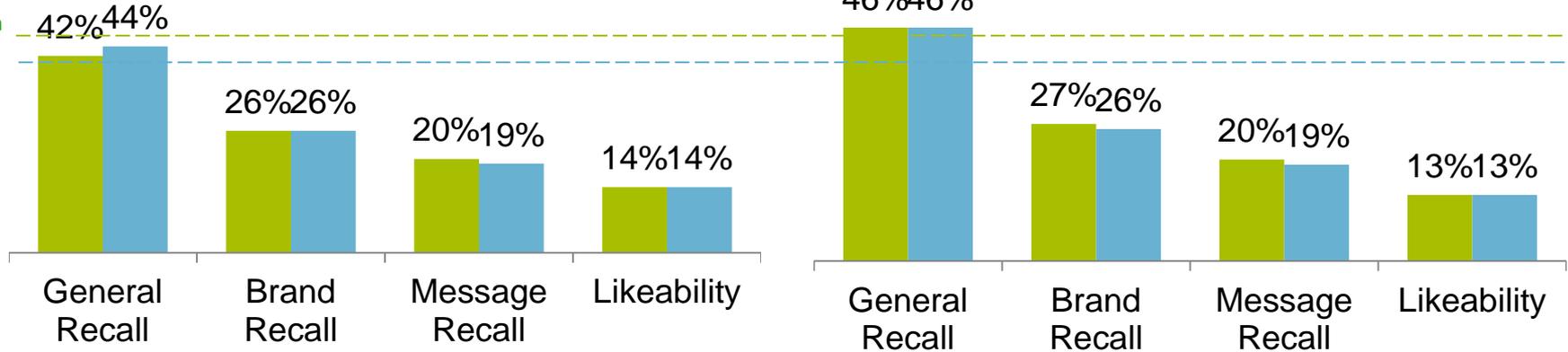
## Non-CPG Women 18-49

44%

Avg. Ad Recall A18-49 Short Form Ads

45%

Avg. Recall A18-49 TV Ads



## Non-CPG Men 18-34

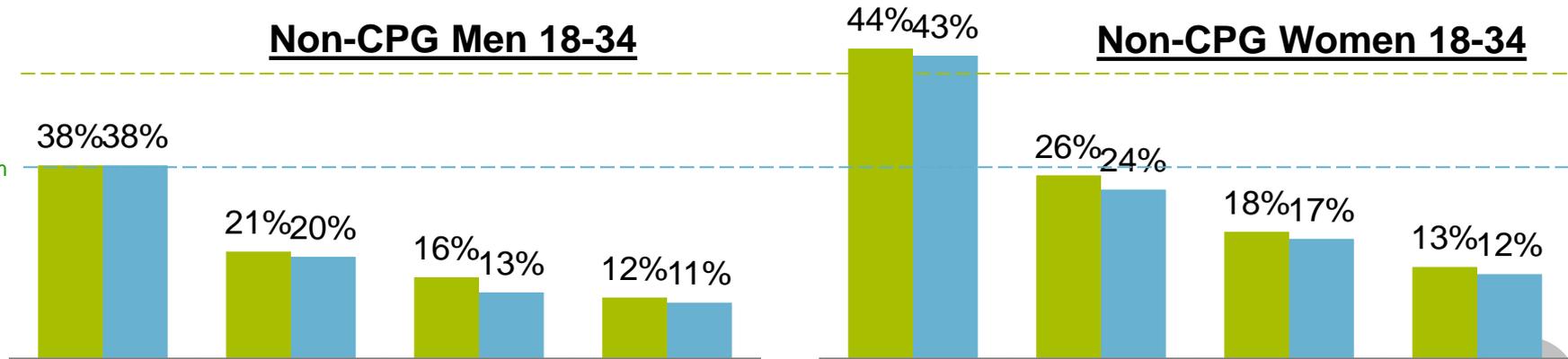
## Non-CPG Women 18-34

42%

Avg. Ad Recall A18-49 Short Form

41%

Avg. Recall A18-34 TV Ads



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

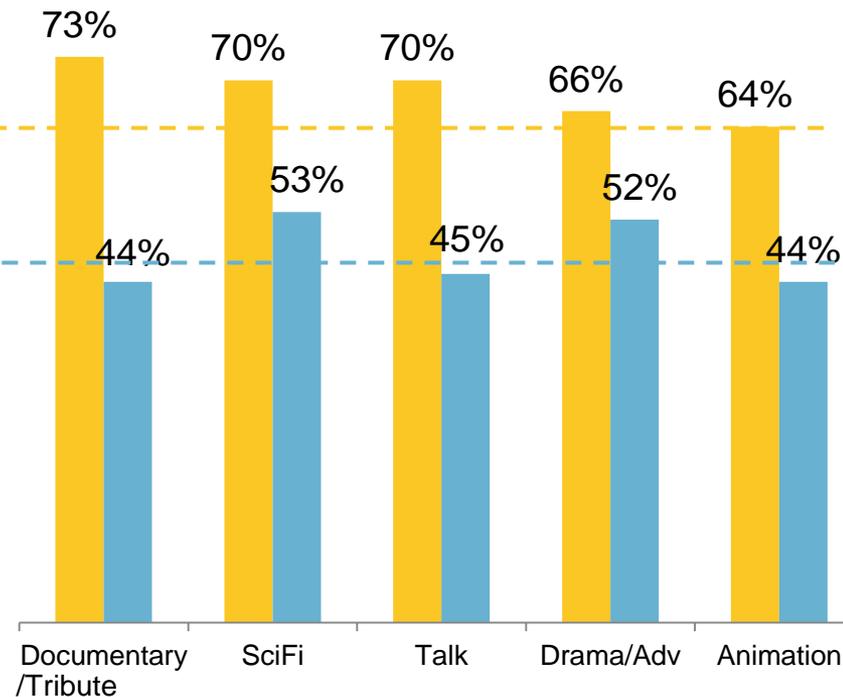
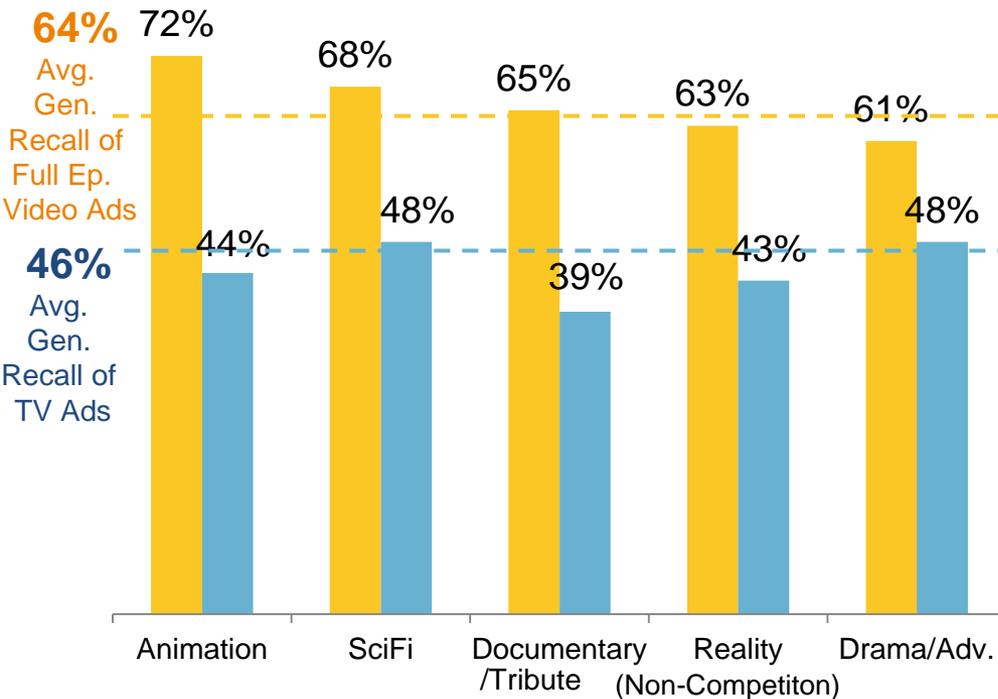
# Online Video Ads During Full Episodes are Most Effective in These Genres...

## ....For CPG:

## ...For Non-CPG:

■ Online Video Ads in Full Episode Players

■ TV Commercials (Broadcast + Cable)

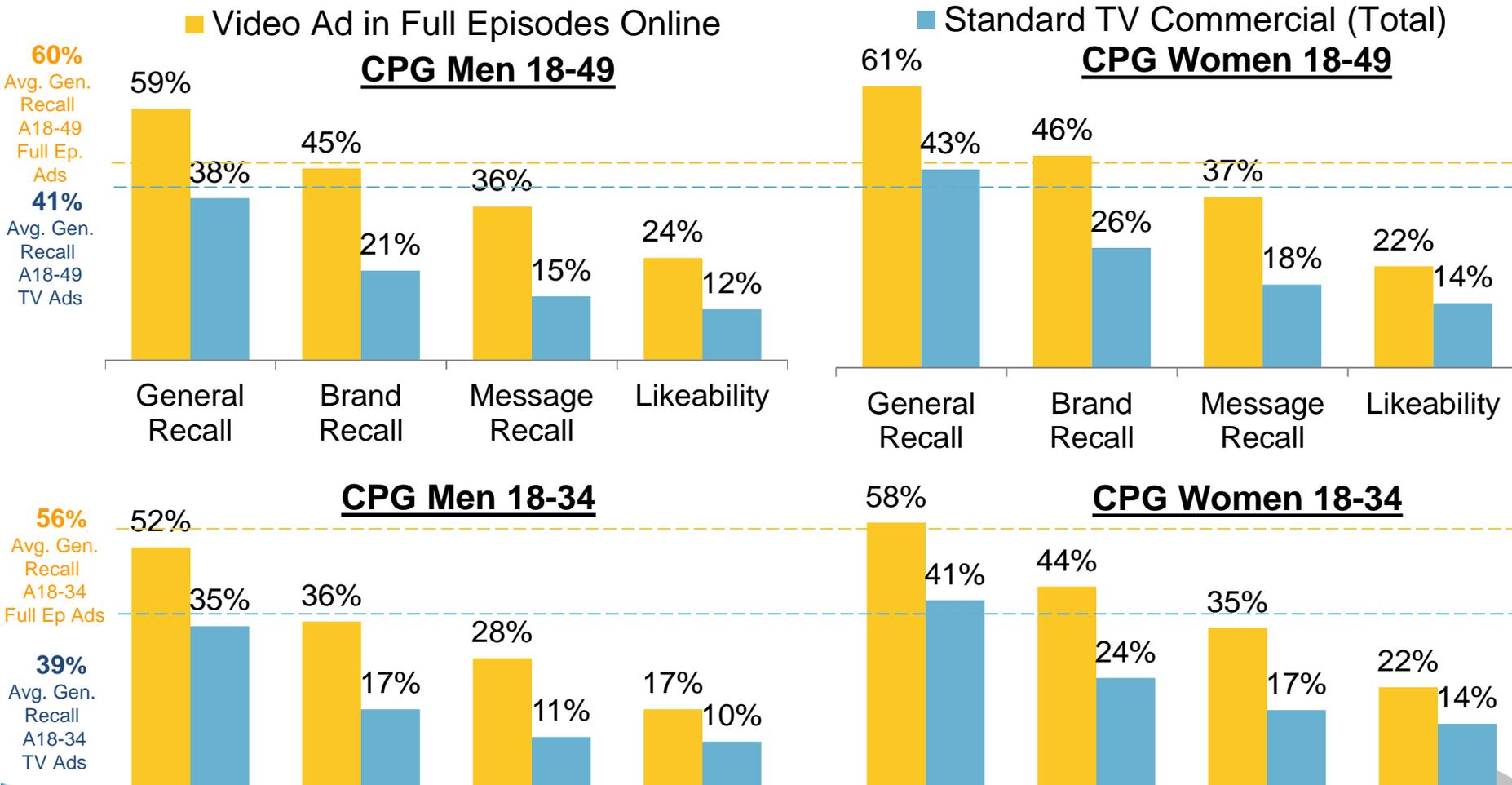


Top Content Genres for CPG Ad Effectiveness  
(General Recall), Adults 18+

Top Content Genres for Non-CPG Ad Effectiveness  
(General Recall), Adults 18+

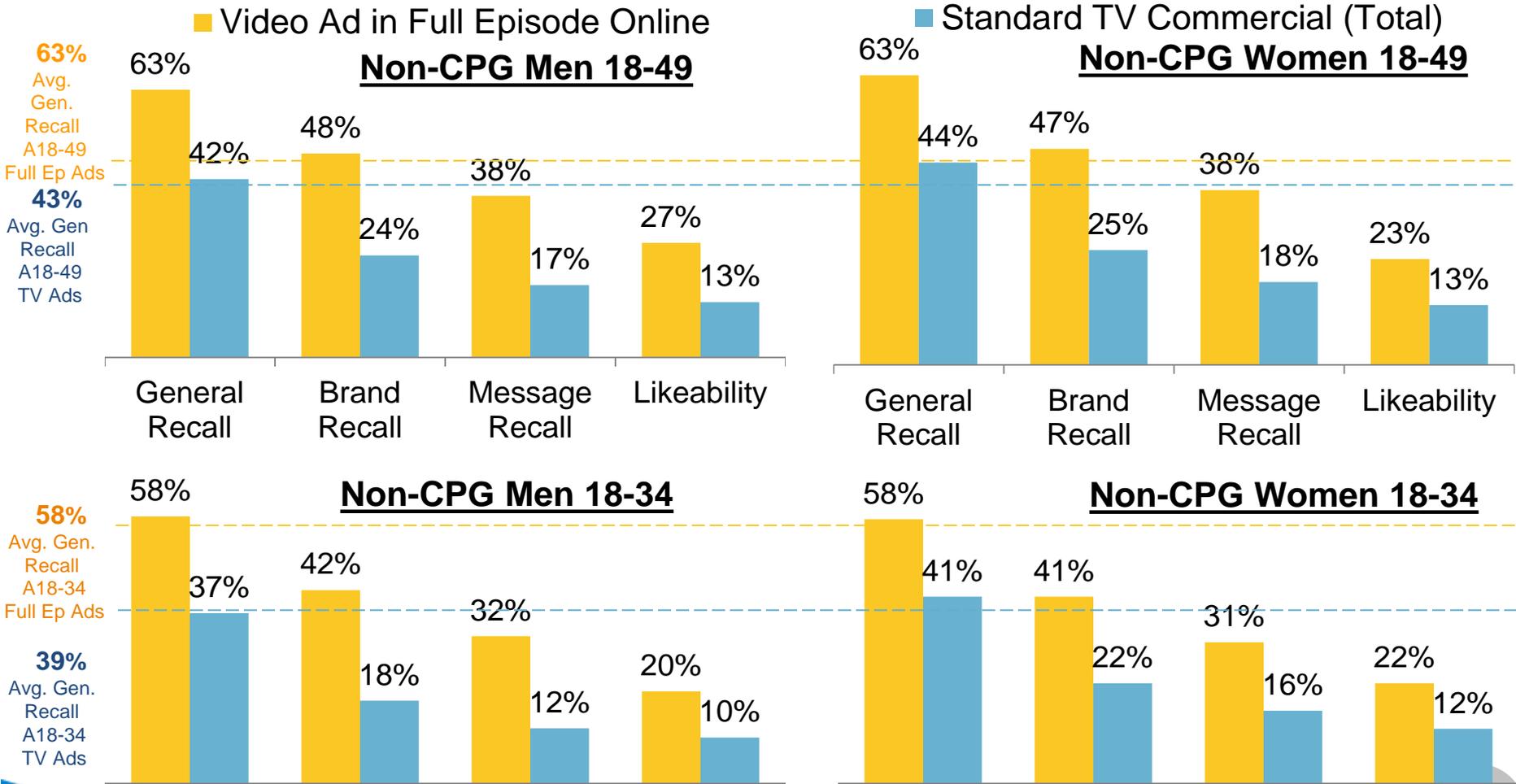
Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

# Across Demos, CPG Video Ads are More Effective in Full Episodes Online Than on TV



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

# Across Demos, Non-CPG Video Ads are More Effective in Full Episodes Online Than TV

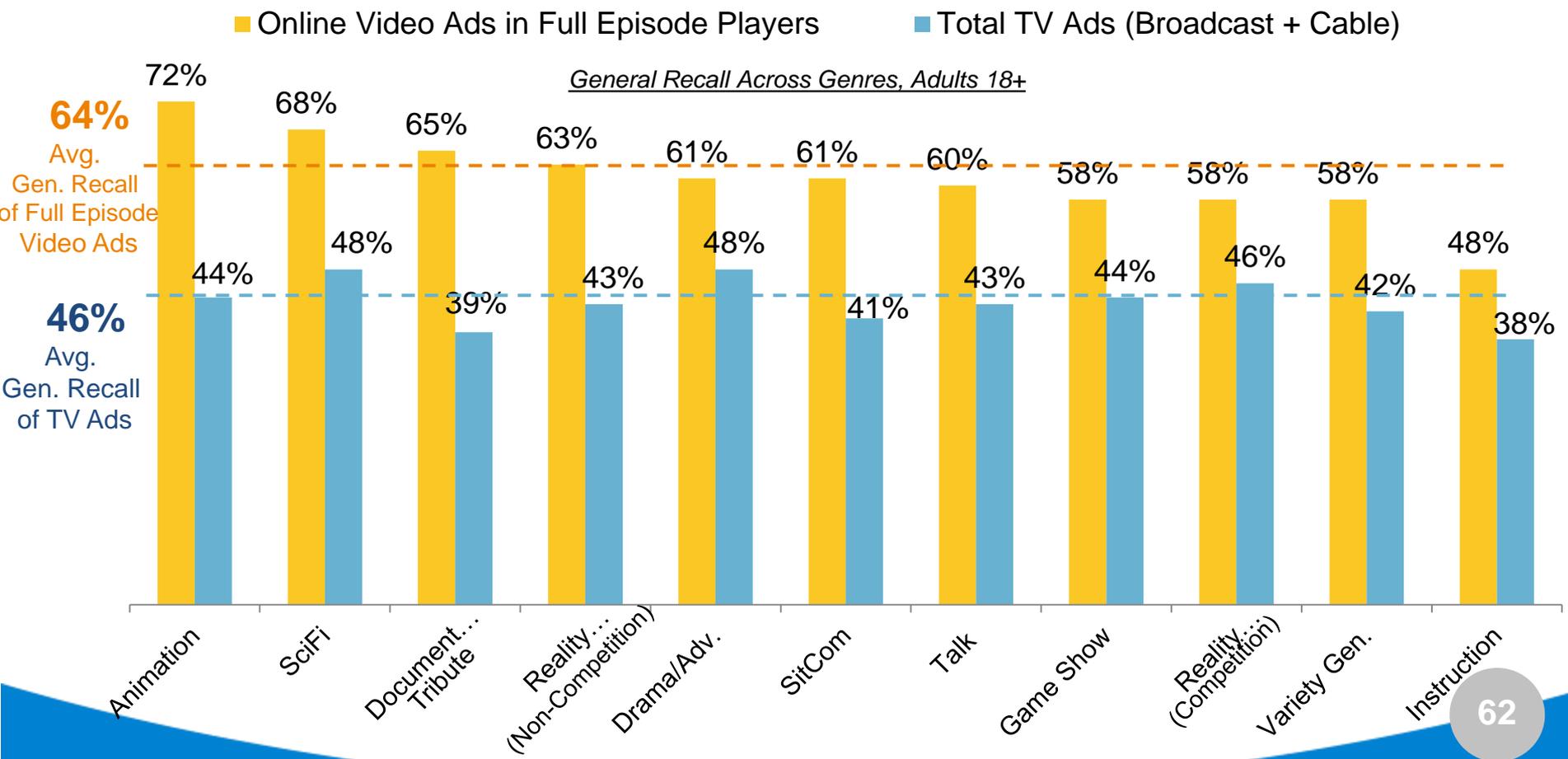



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.

# Across Genres, Online CPG Video Ads During Full Episodes Are More Memorable Than TV Ads



- CPG Video Ads in Animation, Science Fiction, Documentaries, Reality and Drama Have Best General Recall in Full Episodes Online



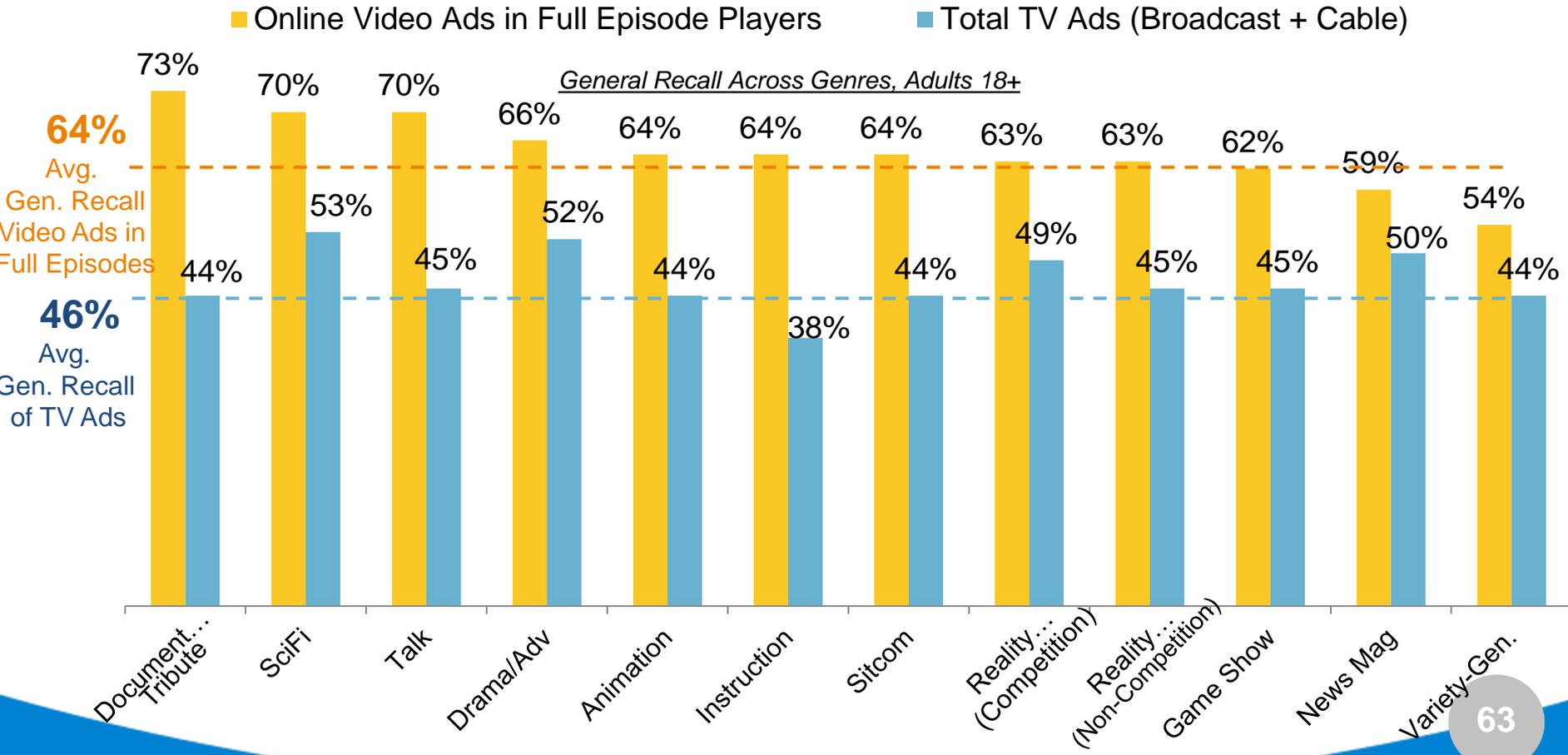
Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.



Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Online & TV data based on responses up to 1 day post-ad stream  
 Limited to the same brands that streamed online and aired on TV  
 during the same period; specific creative executions may vary

# Across Genres, Non-CPG Online Video Ads During Full Episodes Are More Memorable Than TV Ads

- Video Ads in Documentaries, SciFi, Talk, Drama and Animation in Full Episodes Online Have Best General Recall



Note: CPG and non-CPG Ads in this brand effect section differ from ads in share-shift section, but CPG and non-CPG Ad Verticals are similar.



# Digital Video Ad Behaviors



# On Average, People Streaming Video Watch The Majority Of The Ads Featured



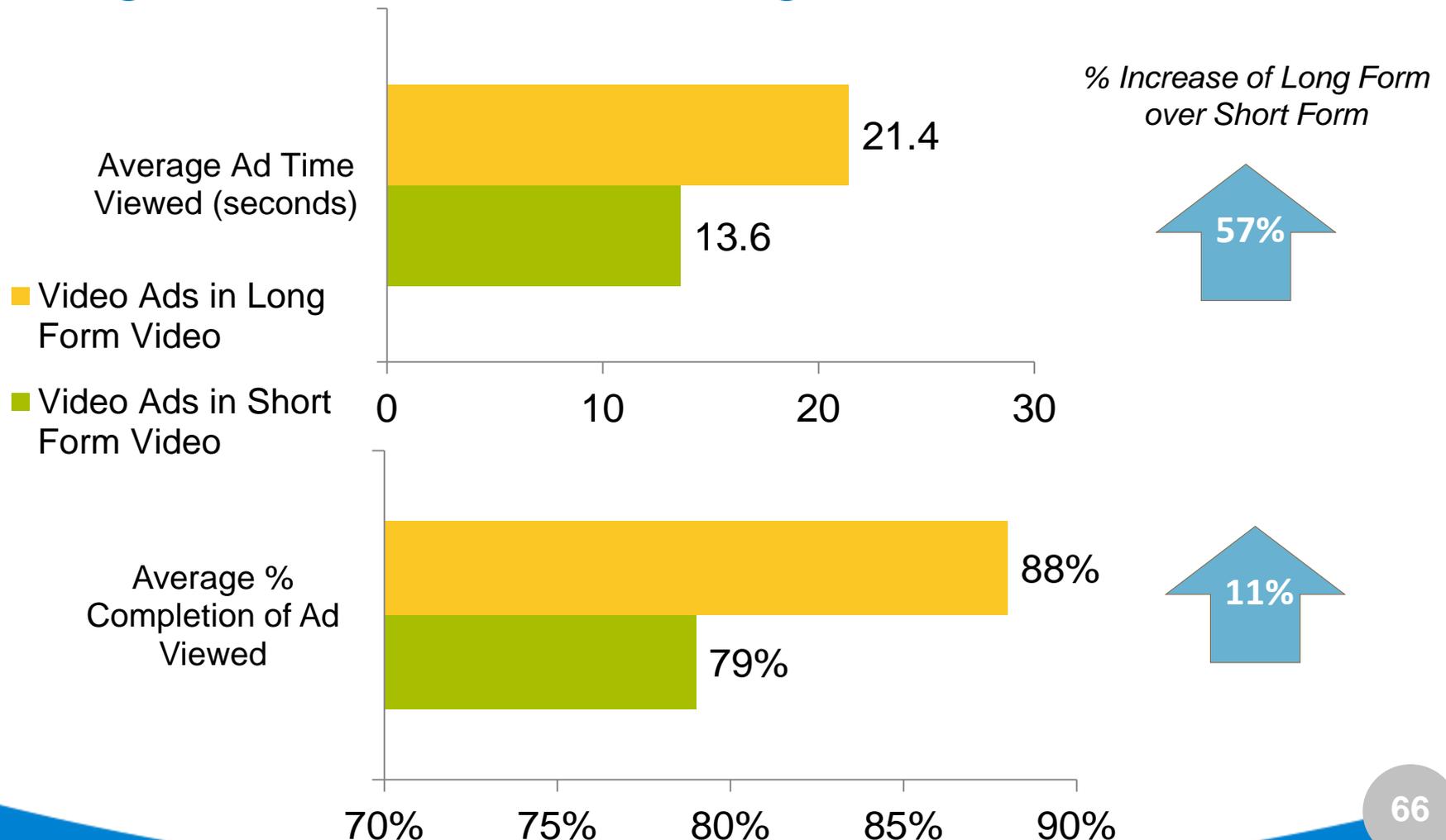
**20**  
seconds

the average length of viewing per  
online video ad

**87%**

the average completion percent of  
those viewing ads in online video

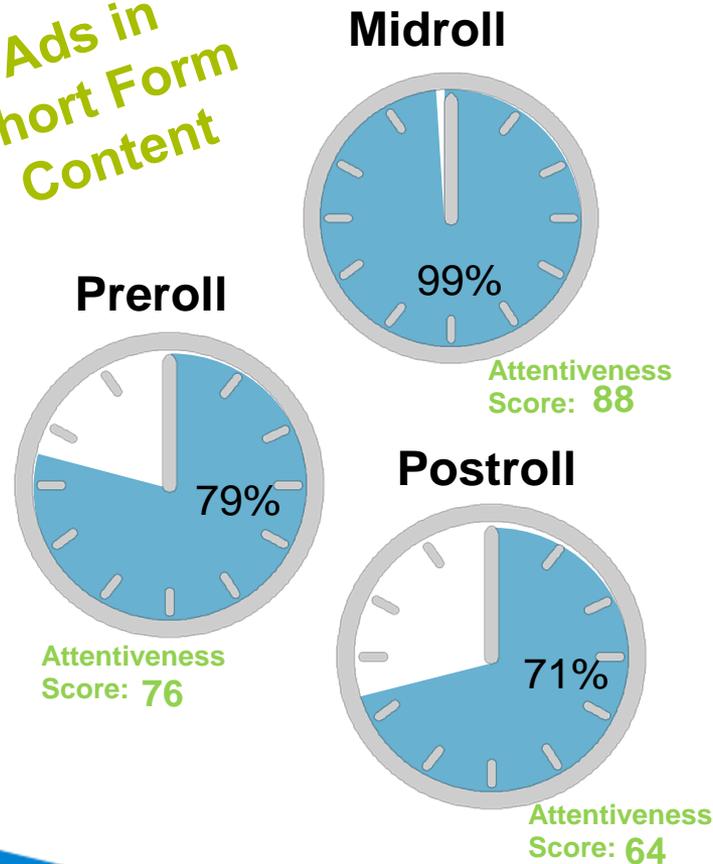
# Those Viewing Long Form Content Watch Ads **iab.** Longer Than Those Viewing Short Form Content



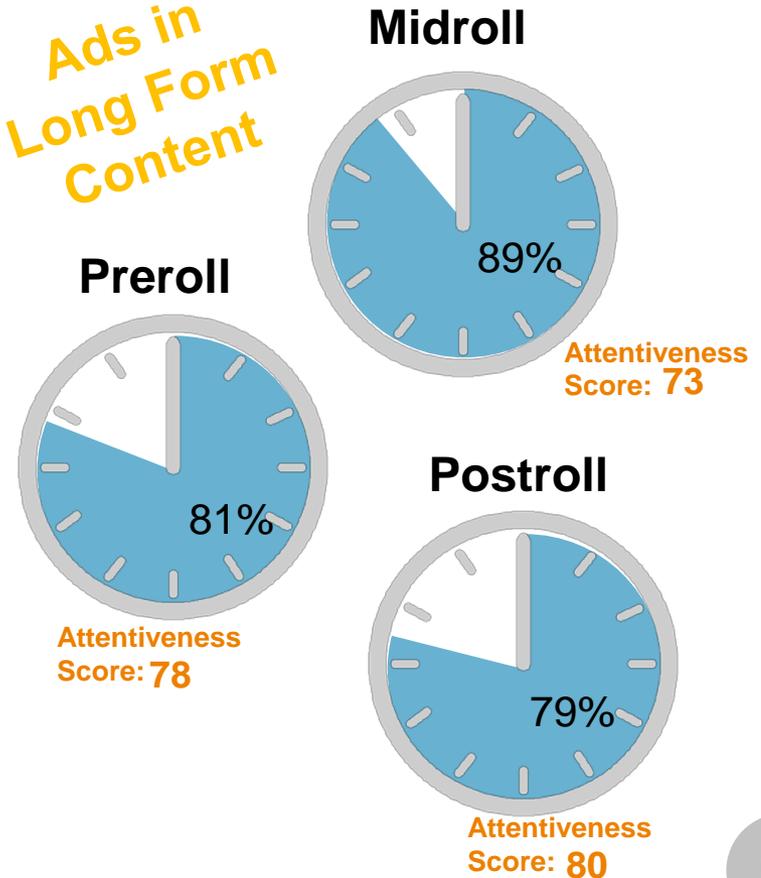
# Mid-Roll Ads\* Have Higher Viewing Completion Rates Than Either Pre-roll Or Post-roll Ads



Ads in Short Form Content



Ads in Long Form Content



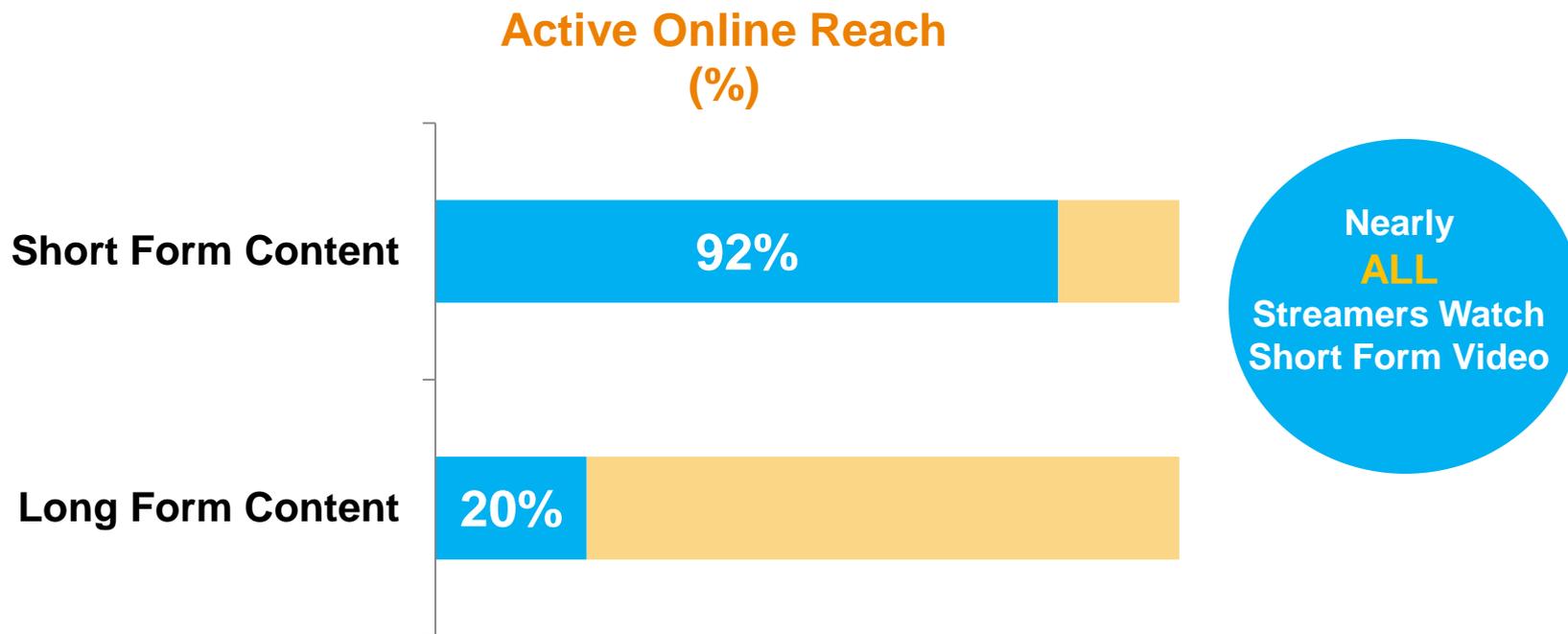


## Different Types of Video Viewing:

- Short Form Video vs. Long Form
- Professional Video vs. UGC
- Viewing Trends Across Categories



# Short Form Content Reaches Nine in Ten Online Video Viewers

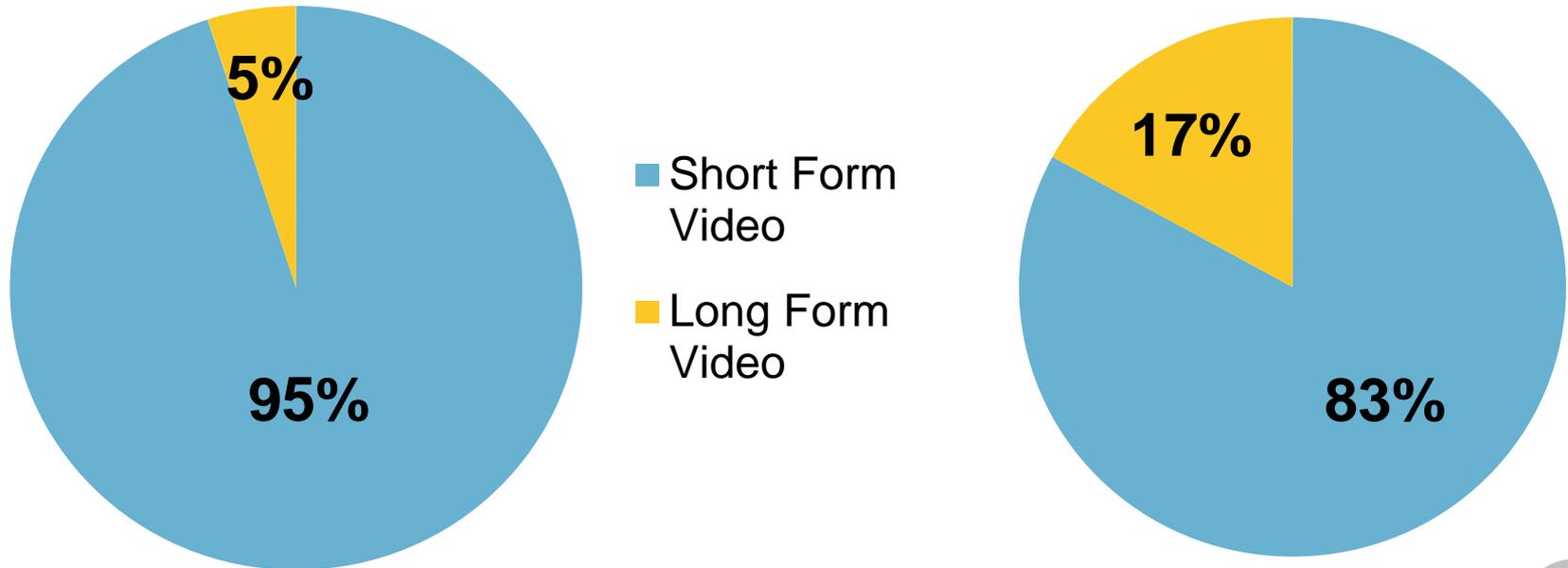


\*Long Form Video refers to any video over 24 minutes long and includes full episodes. Short form refers to under 24 minutes. See Sl. 11 for full definitions.

# Most Online Video Viewed is Short Form

- Roughly Four out of Five Minutes Spent Watching Digital Video is of Short Form Content

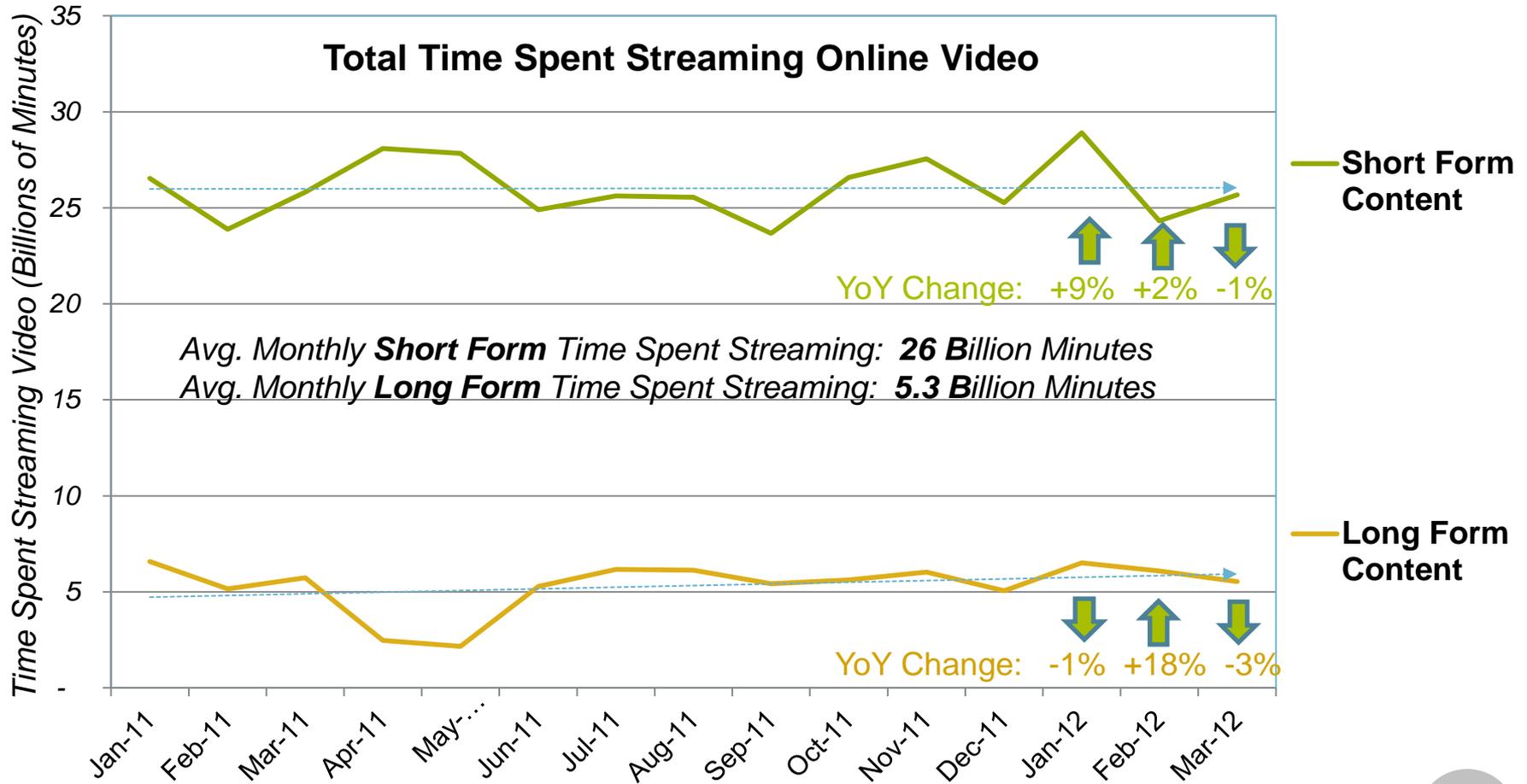
**Total Number of Online Videos Streamed (%)      Total Time Spent Streaming Online Video (%)**



\*Long Form Video refers to any video over 24 minutes long and includes full episodes. Short form refers to under 24 minutes. See Sl. 11 for full definitions.

70

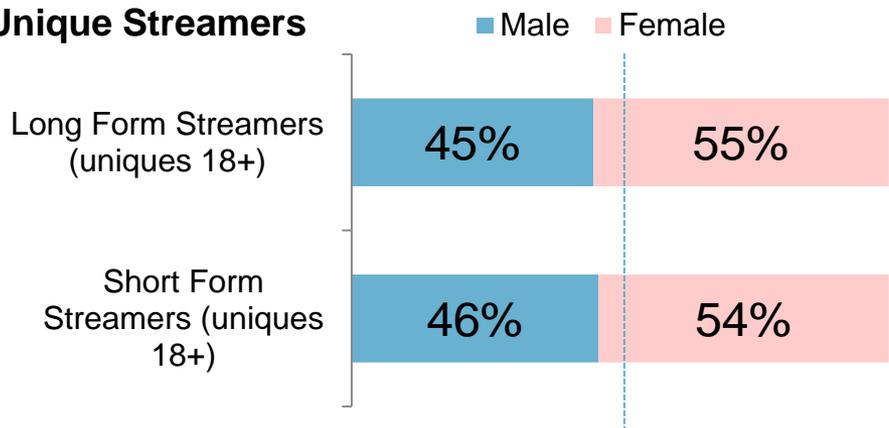
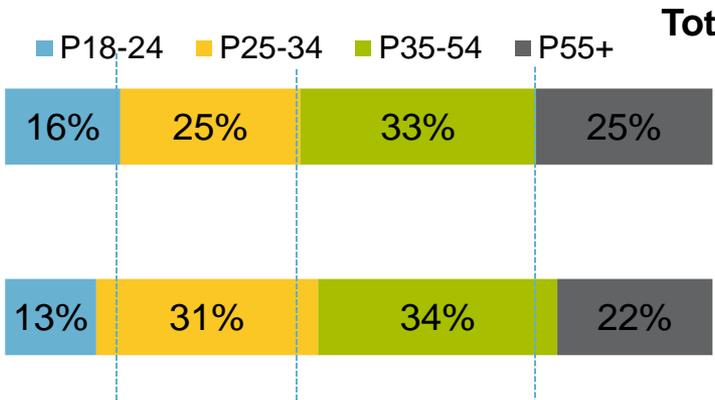
# Short Form and Long Form Digital Video Show Seasonal Jan. Spike



\*Netflix changed its methodology in April and May, impacting Time Spent Streaming Movies (Long Form) and Movie Trailer (Short Form)

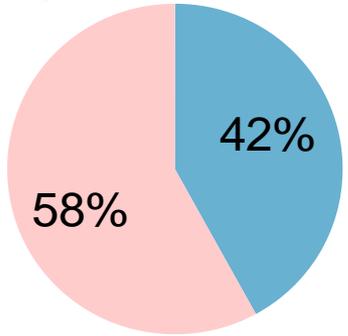
# Long and Short Form Streamers Are Similar...

## More Streamers are Women



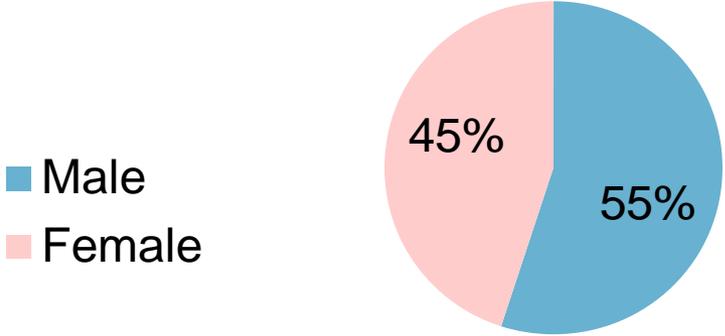
## But Women Stream More Long Form Videos; Men Prefer Short Form

**Total Long Form Videos Streamed**



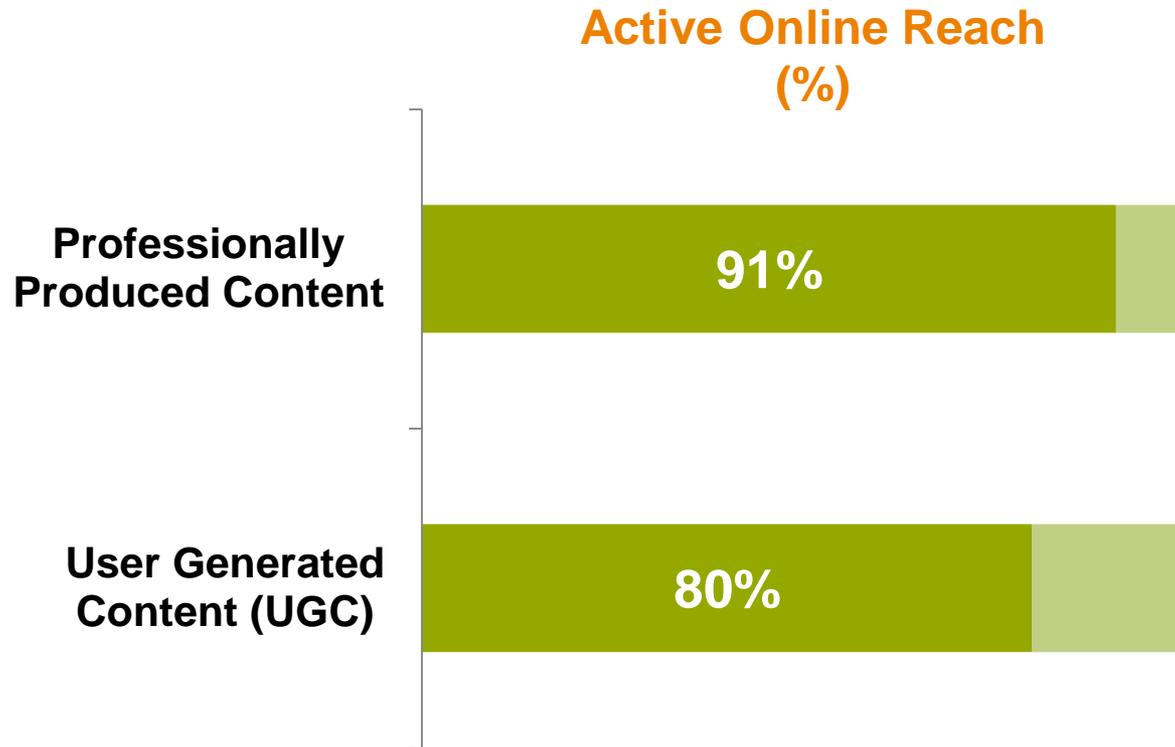
Time Spent Streaming: F 54% : M 46%

**Total Short Form Videos Streamed**



Time Spent Streaming: F 47% : M 53%

# Professionally Produced Content Reaches 9 in 10 Online Video Viewers; UGC Reaches 8 in 10



Nearly  
**ALL**  
 streamers watch  
 professionally  
 produced  
 video

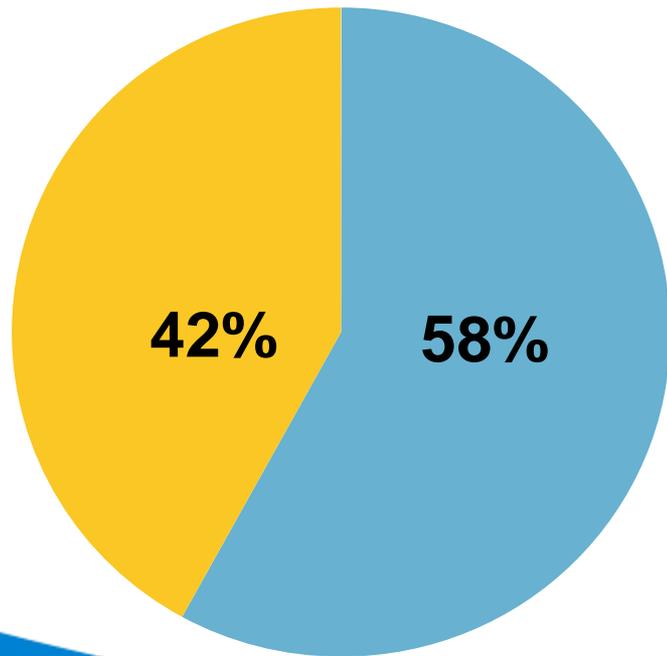
*\*See Sl. 11 for full definitions.*

*Brand channels were pulled out of YouTube traffic and attributed to professionally produced content.*

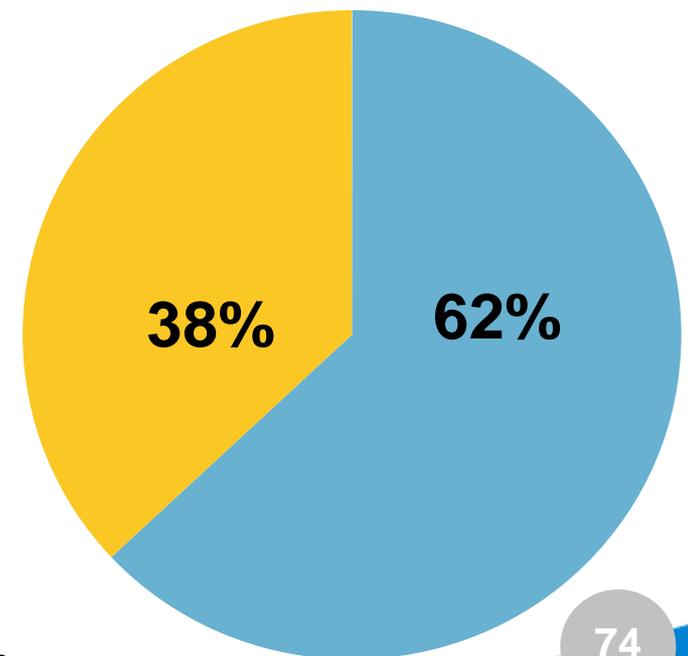
# Two-Thirds of Time Spent Streaming is of Professionally Produced Video

- UGC Accounts for 42% of Videos of Videos Streamed
- Roughly 1 Out of Every 3 Minutes Viewing Online Video is UGC

Total Online Videos Streamed (%)



Total Time Spent Streaming Online Video (%)

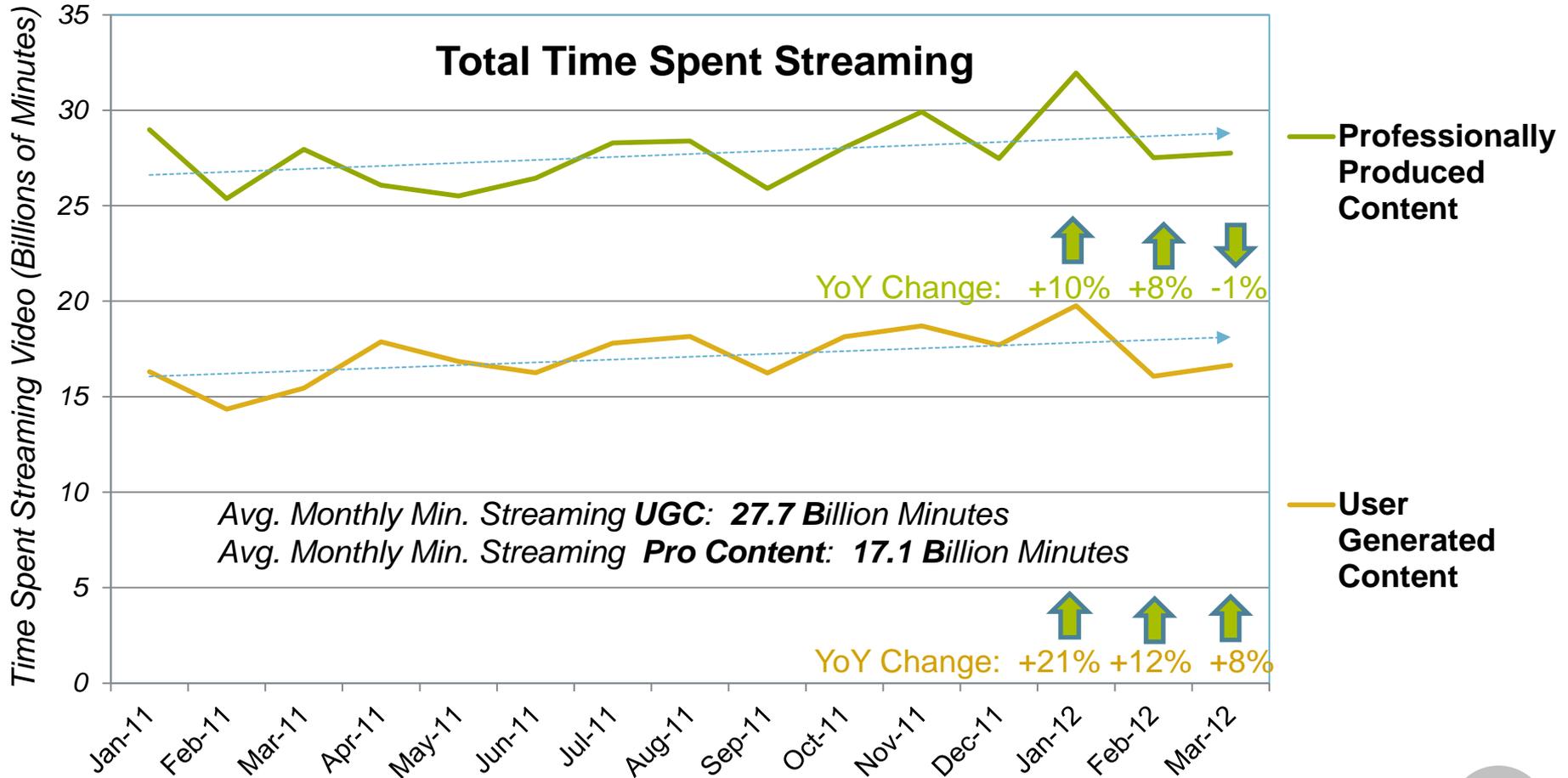


■ Professionally Produced Video  
■ User Generated Content

*\*See Sl. 11 for full definitions.*

*Brand channels were pulled out of YouTube traffic and attributed to professionally produced content.*

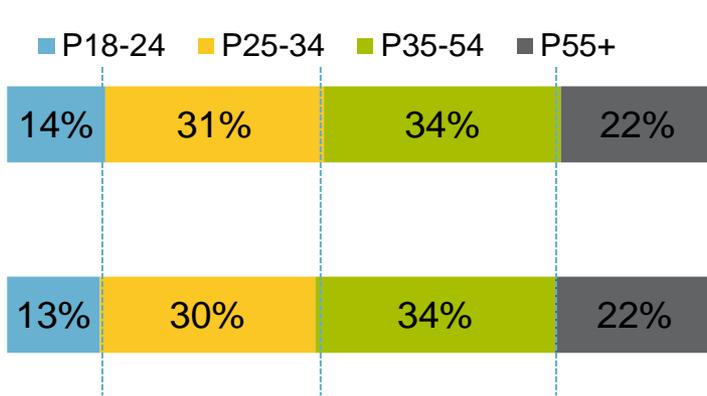
# UGC and Professional Digital Video Grow; Both Seasonally Spike in Jan.



# Streamers of UGC and Professional Content Are Similar...

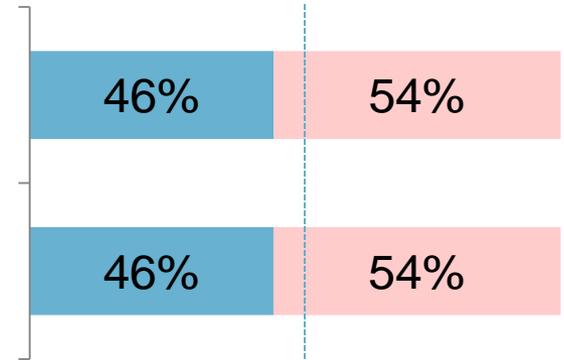
## More Streamers are Women

Total Unique Streamers



Professional Content

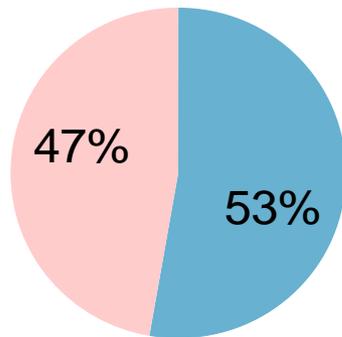
Male Female



UGC

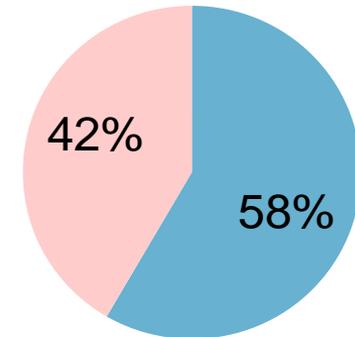
## But Men Stream More Professional Videos and UGC, especially UGC

Total Professionally Produced Videos Streamed



Time Spent Streaming: F 47% : M 53%

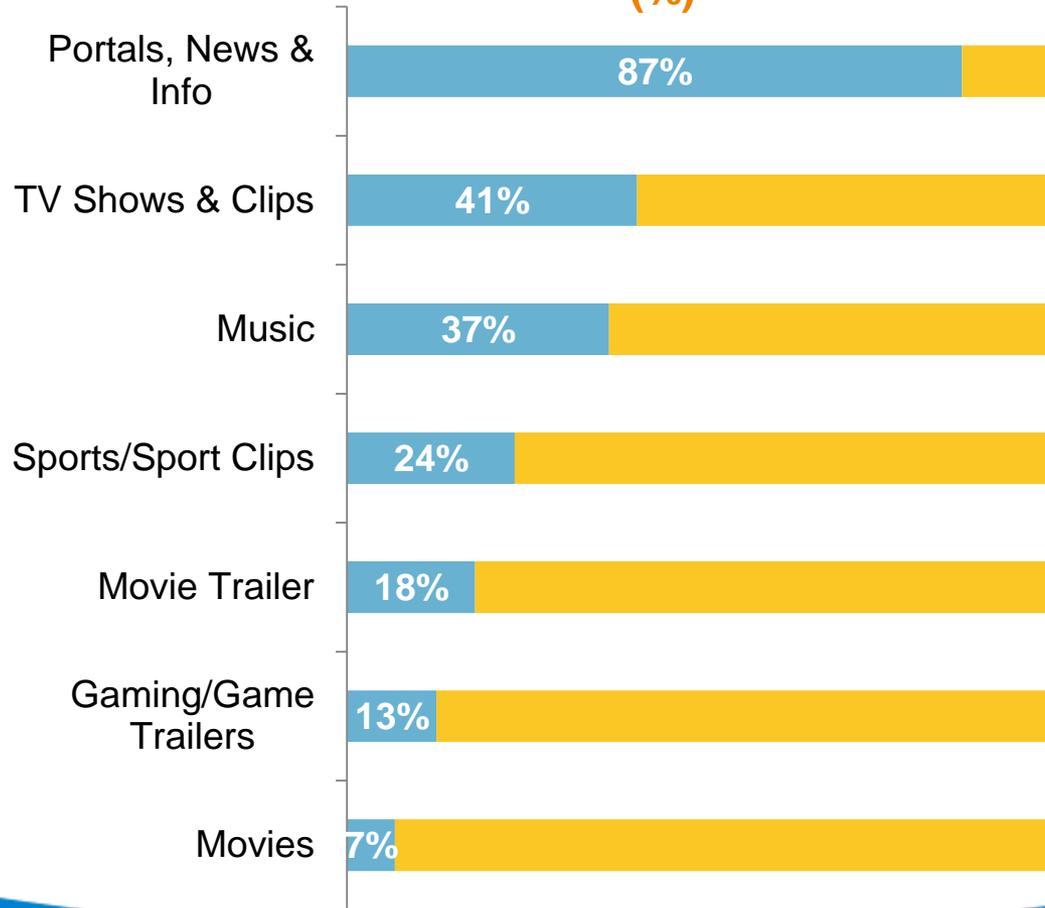
Total UGC Videos Streamed



Time Spent Streaming: F 43% : M 57%

# News & Info Has More Than Twice the Reach of Any Other Genre of Online Video

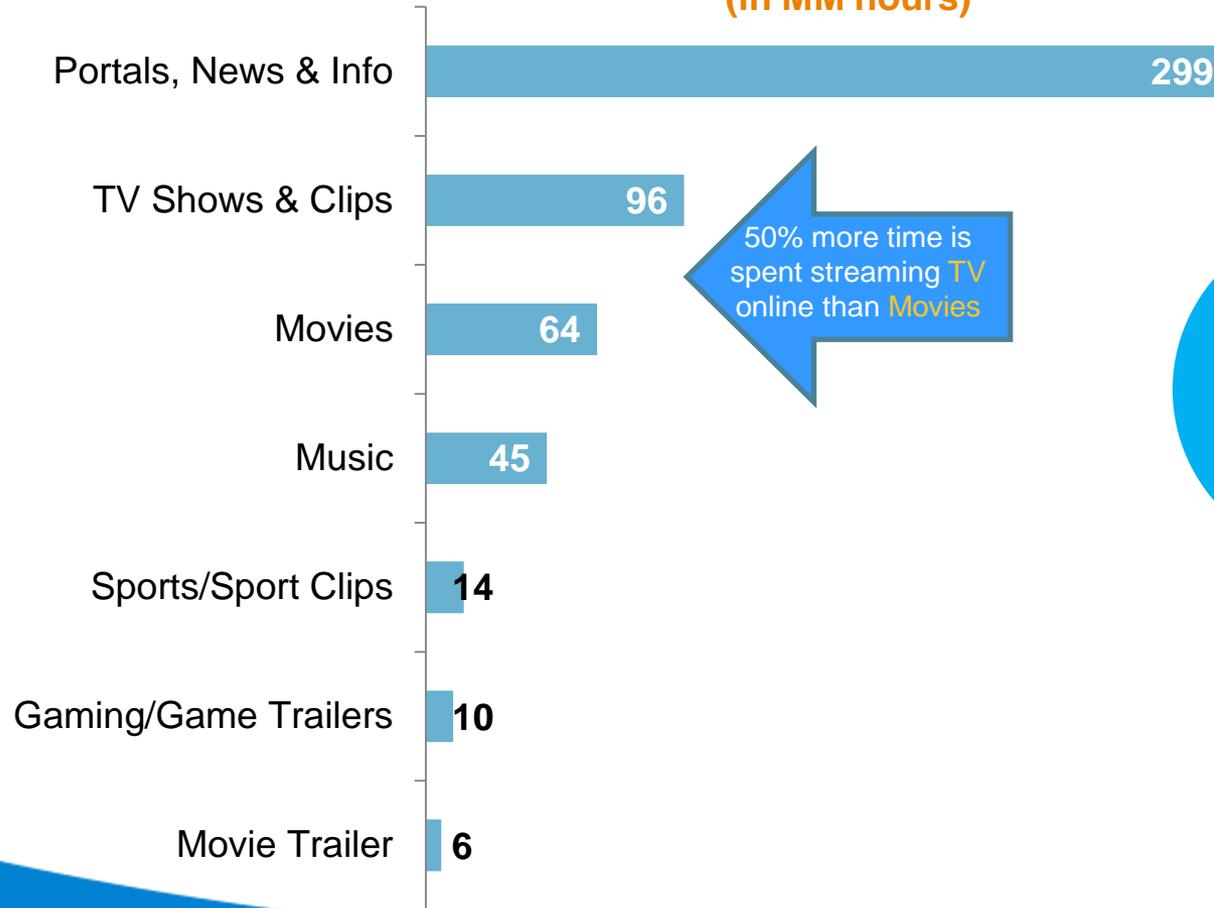
Active Online Streaming Reach (%)



Nearly **HALF** of all streamers view TV shows and clips online.

# More Time is Spent Streaming Portals, News & Info Video Than Any Other Genre

**Avg. Monthly Total Time Spent Streaming Online Video (in MM hours)**



50% more time is spent streaming TV online than Movies

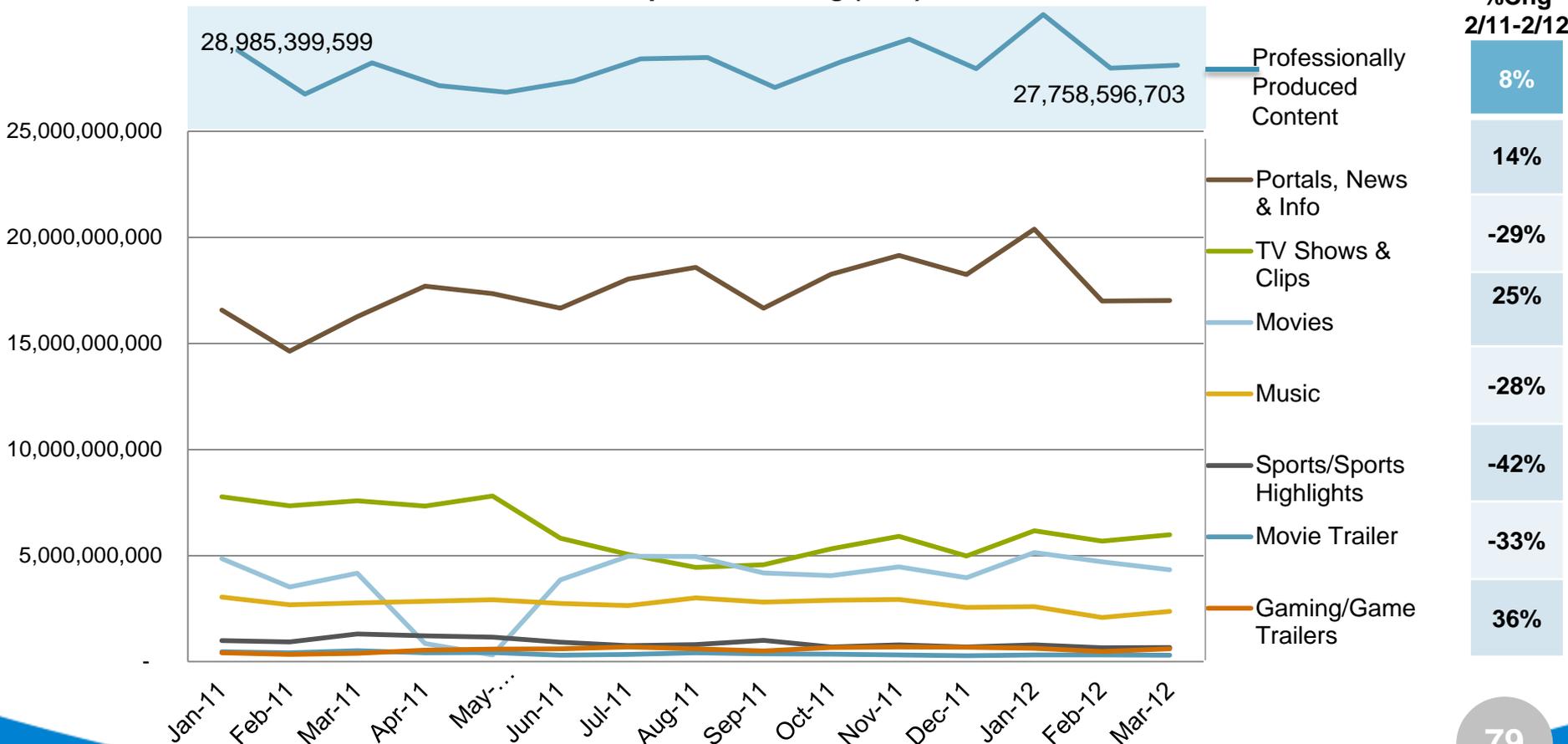
Users View **Three Times** as Many Minutes of **News & Info** Than **TV Shows**

# Time Spent Streaming Professionally Produced Video Grows 8% Year Over Year



- Largely driven by Full Length Movies, News & Info, and Games

**Total Time Spent Streaming (Min.)**



\*Netflix changed its methodology in April and May, resulting in Movie Trailer drop in Time Spent Streaming .Feb. chosen for YoY comparison to avoid Jan. seasonality

79

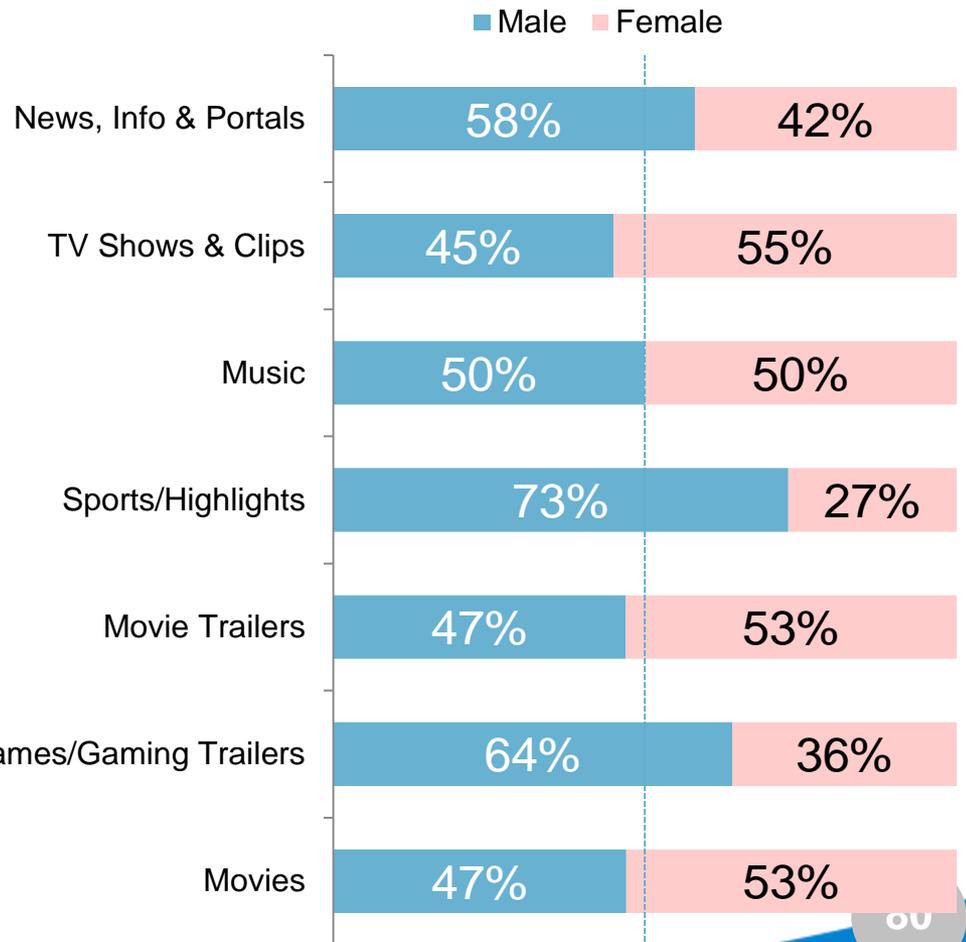
Jan. 2011 – Mar. 2012  
Source; NetView Online Panel  
Total Minutes Spent Viewing (Sum Total)  
IAB Online Video Study



Short Form is defined as online video content less than 24 minutes in length. Long Form is defined as online video content longer than 24 minutes in length. Full Episodes are considered Long Form Content.

# Demos of Video Genres by Videos Streamed

**Profile by Total Number of Online Videos Streamed (%)**



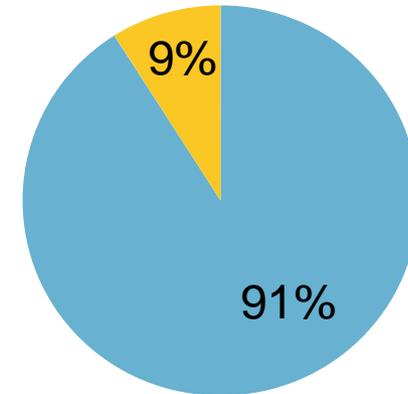
# Appendix



# Identifying Future Opportunities With Learnings From Past Studies **iab.**

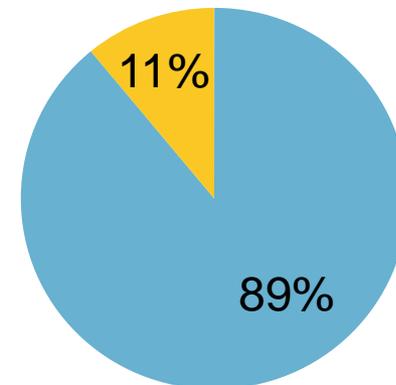
- Aggregated 18 different studies from different advertisers across categories including:
  - Food
  - Health & Beauty
  - Beverage
  - Technology
  - Auto
  - Retail
  - Finance
  - Telecom
- CPG break out includes aggregate of Food, Health & Beauty, and Beverages

**CPG Studies (13)**



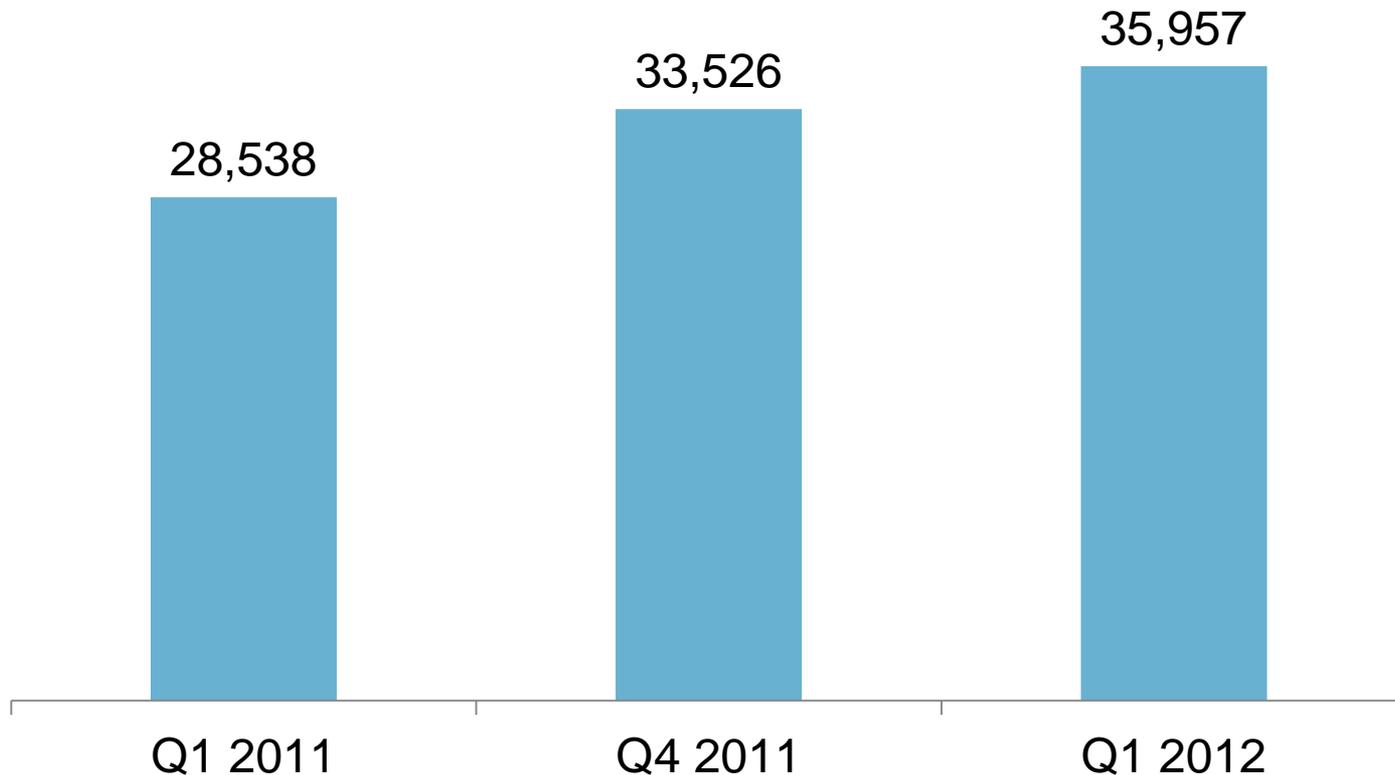
■ Online Display ■ Online Video

**All Studies (18)**



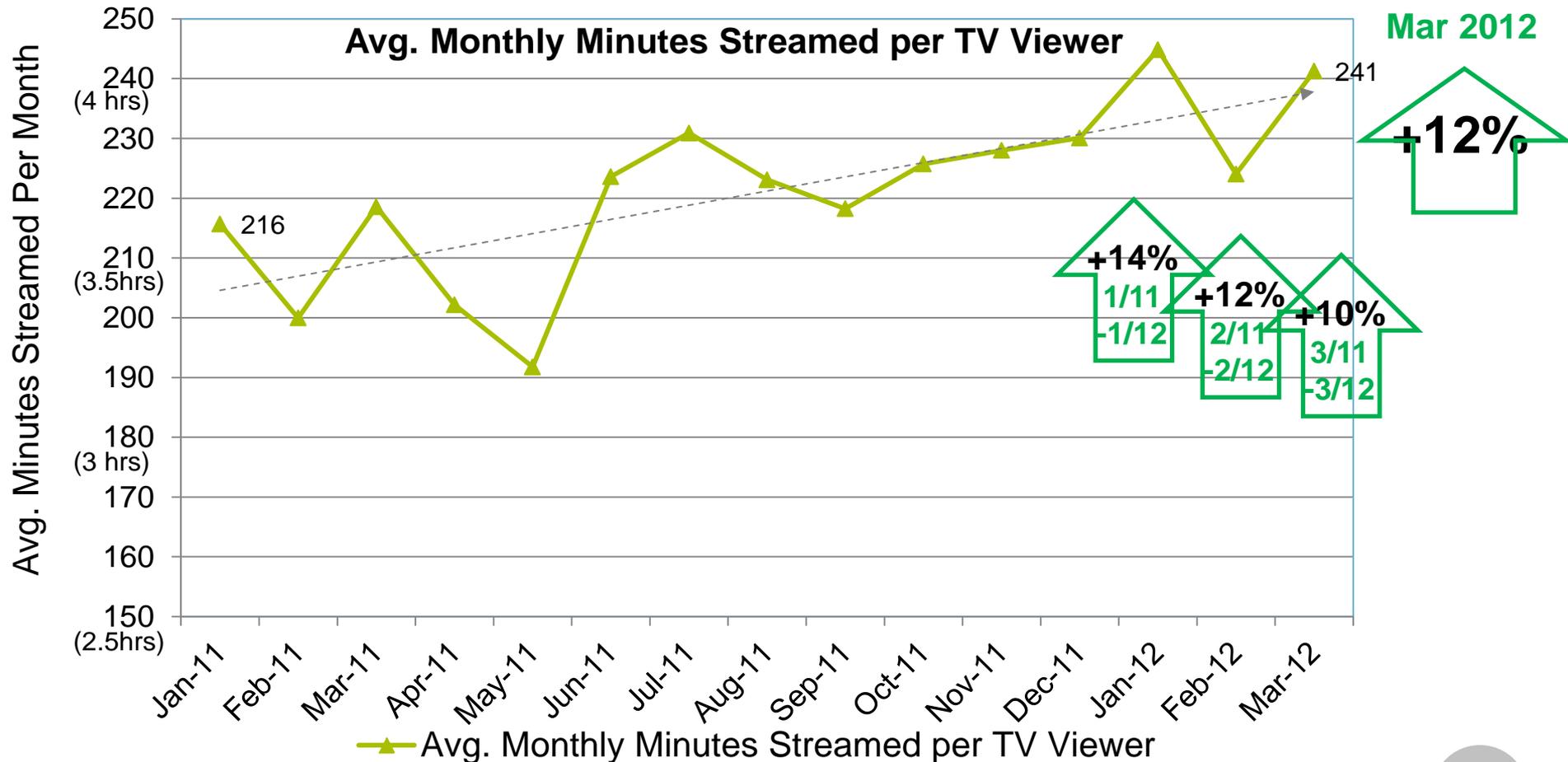
# Mobile Video Viewing Is Growing Along With Online Video

**Mobile Video Viewers (000s)**



# Digital Video Viewing is Growing Among TV Viewers

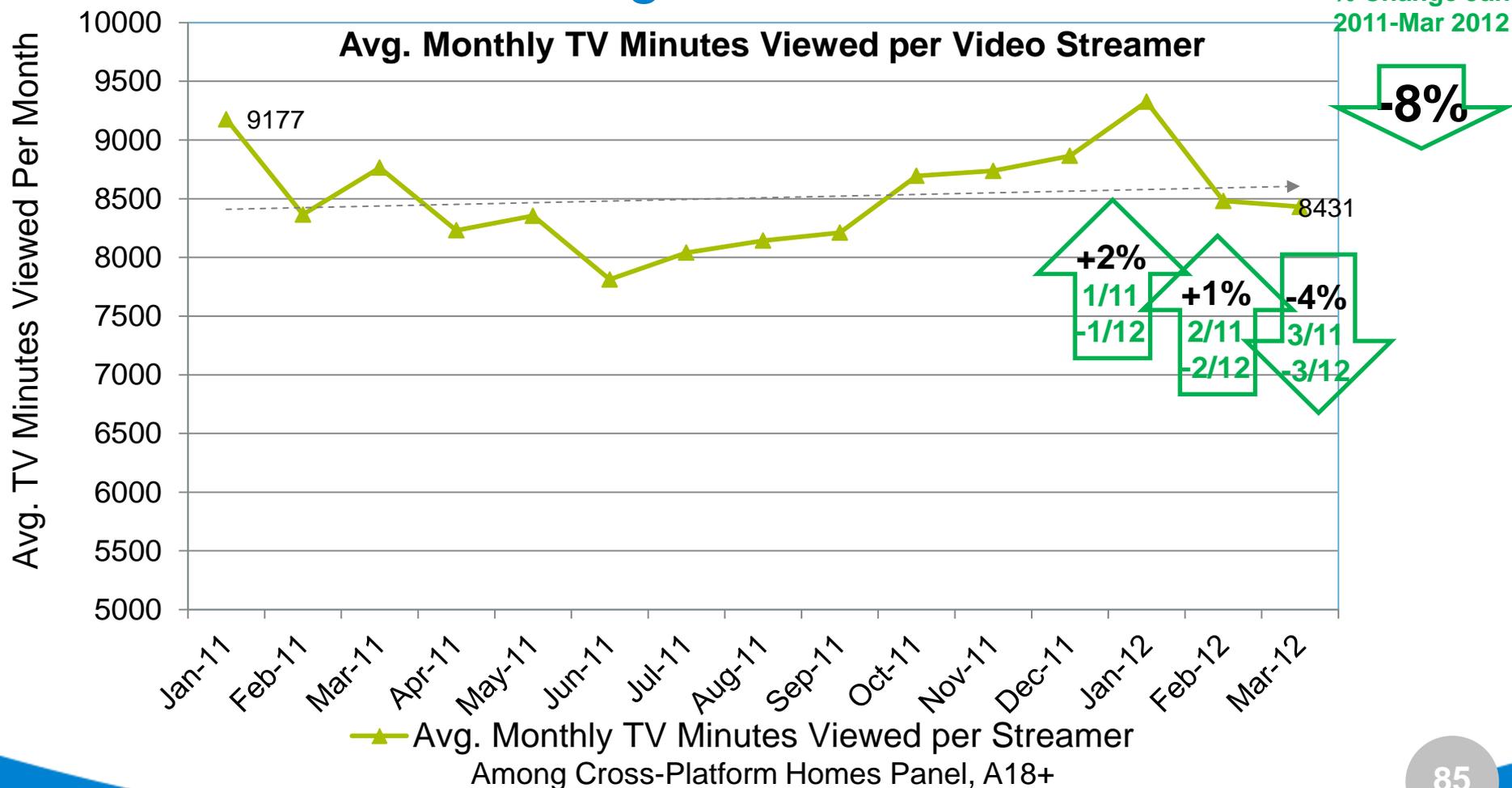
% Change  
Jan 2011-  
Mar 2012



▲ Avg. Monthly Minutes Streamed per TV Viewer  
Among Cross-Platform Homes Panel, A18+

Online Video Streaming Usage by TV Viewers

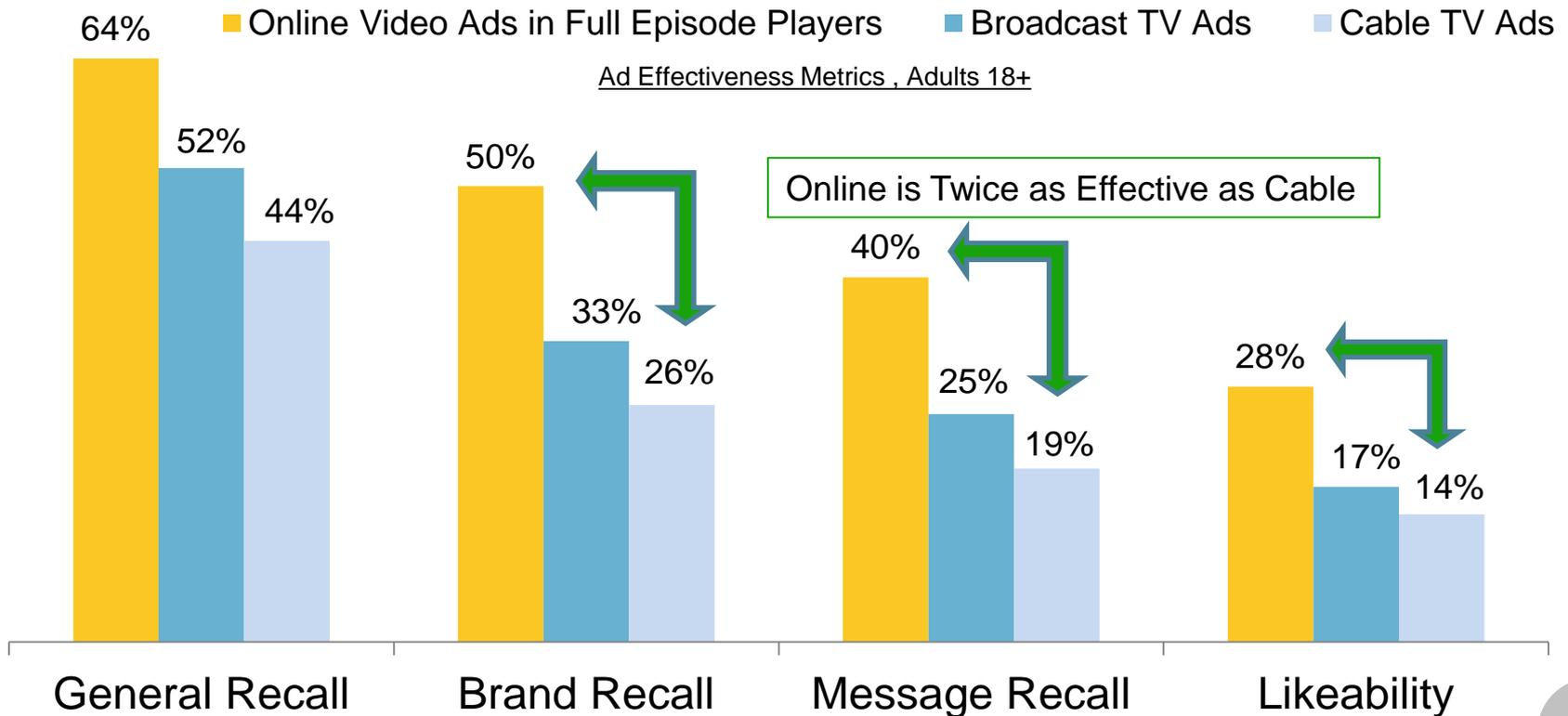
# TV Viewing is Flat Among Video Streamers



TV Viewing by Online Video Streamers

# Online Video Ads During Full Episodes Are More Effective Than Broadcast or Cable TV Ads

- Viewers are Twice as Likely to Enjoy an Online Ad and to Remember it's Brand and Message Than They Are a Cable TV Ad



# Prior Exposure to Short Form Online Video Ads Makes TV More Effective Across Demos



**49%**  
A18-49  
Avg TV+  
Short  
Form  
Video

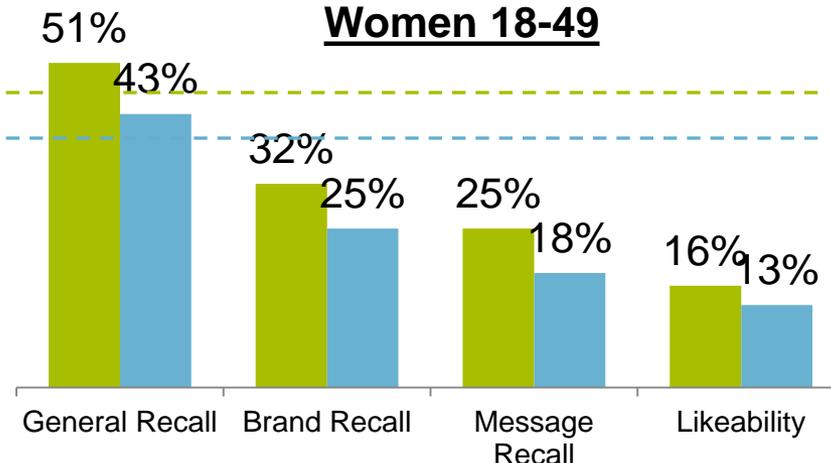
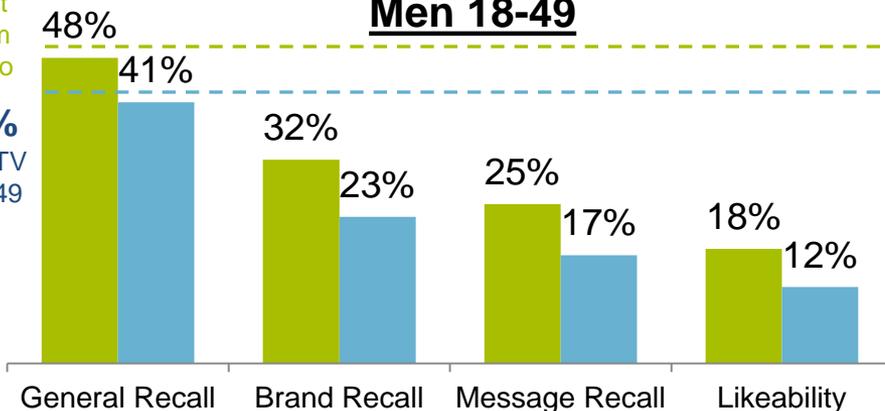
**42%**  
Avg. TV  
A18-49

■ TV + Prior Online Video Ad Exposure in Short Form Video

■ TV Commercials Only (Total)

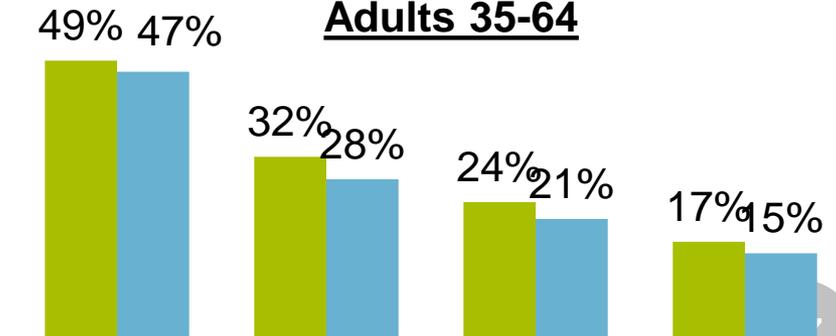
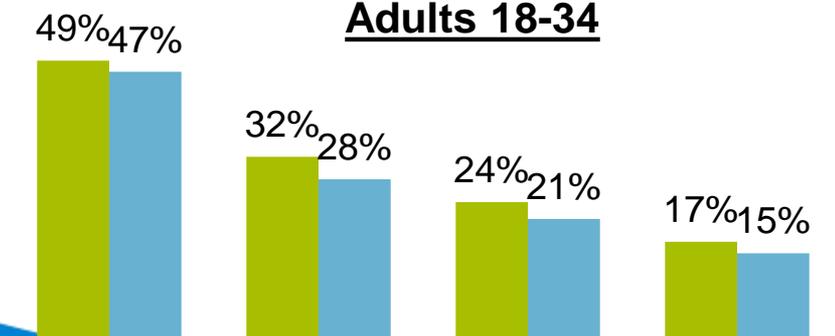
## Men 18-49

## Women 18-49



## Adults 18-34

## Adults 35-64



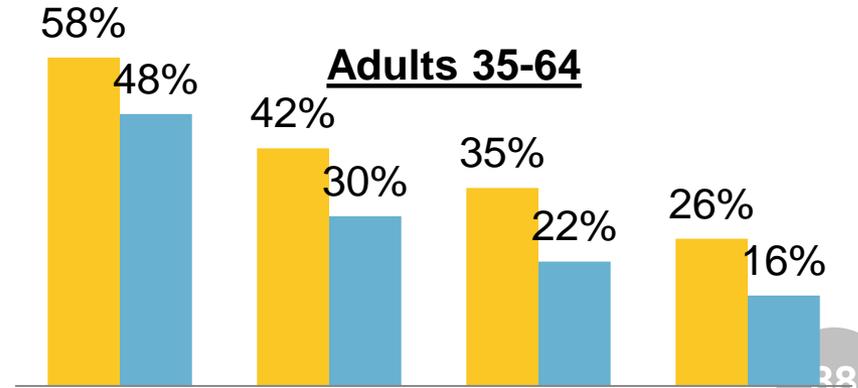
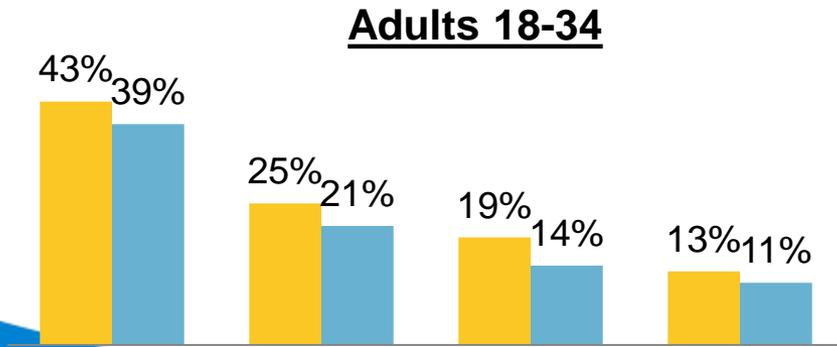
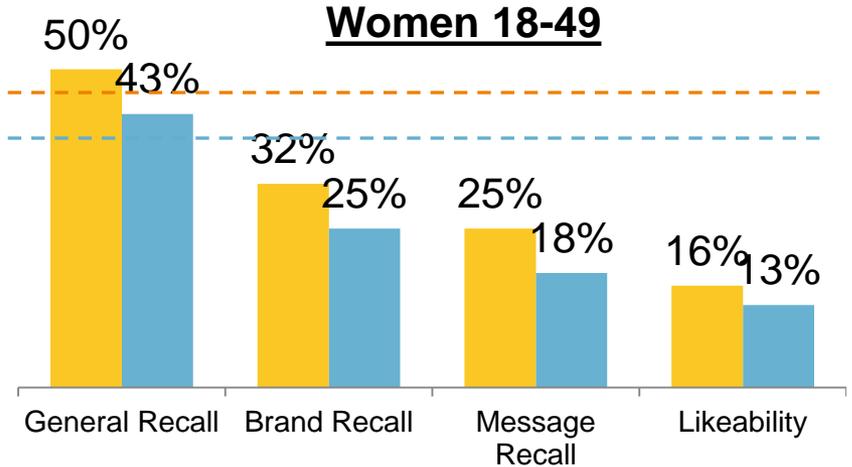
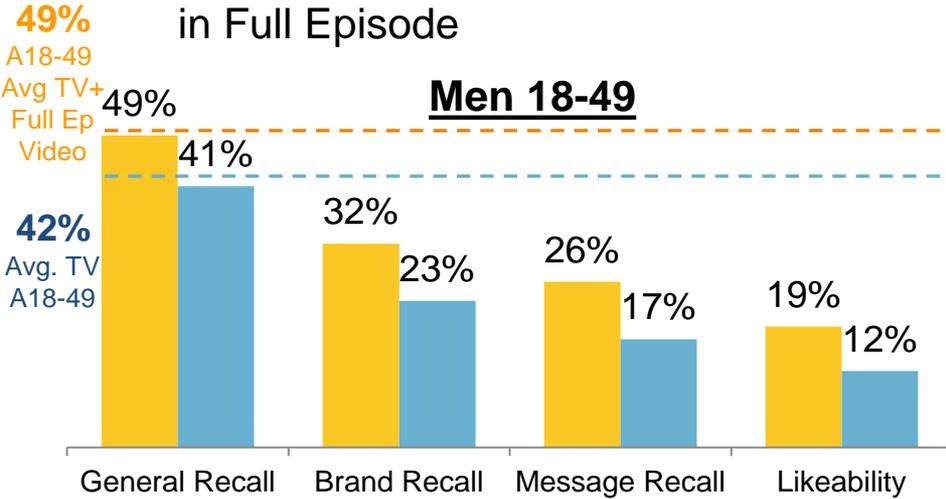
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 Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Green arrows indicate a positive difference at >90% confidence  
 Online & TV data based on responses up to 1 day post-ad stream  
 Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary

# Prior Exposure to Full Episode Online Video Ads Makes TV More Effective Across Demos



■ TV + Prior Online Video Ad Exposure in Full Episode

■ TV Commercials Only (Total)



# Duplication: Prior Exposure to Non-Video Display Ads Online Makes TV More Effective



■ TV + Prior Non-Video Online Ad Exposure

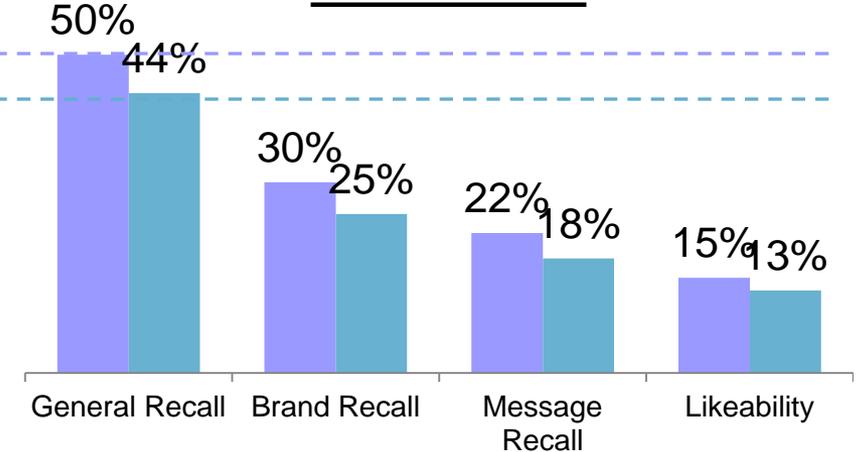
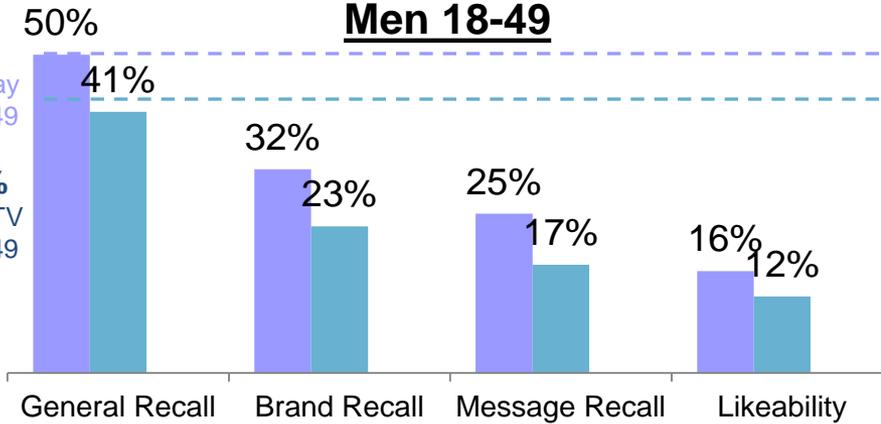
■ TV Commercials Only (Total)

50%  
Avg. TV+ Display A18-49

43%  
Avg. TV A18-49

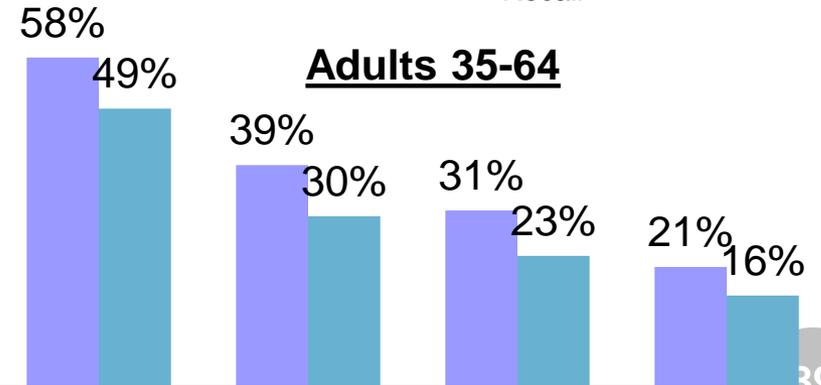
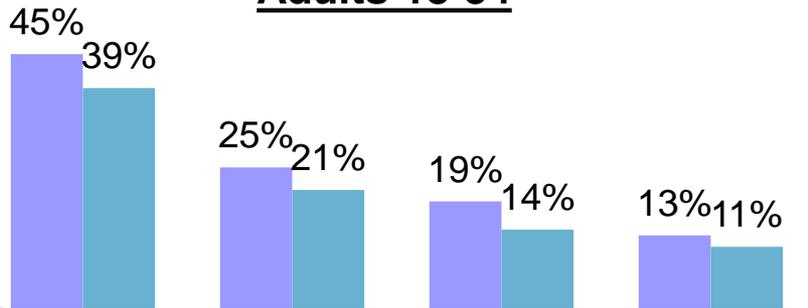
## Men 18-49

## Women 18-49



## Adults 18-34

## Adults 35-64



39

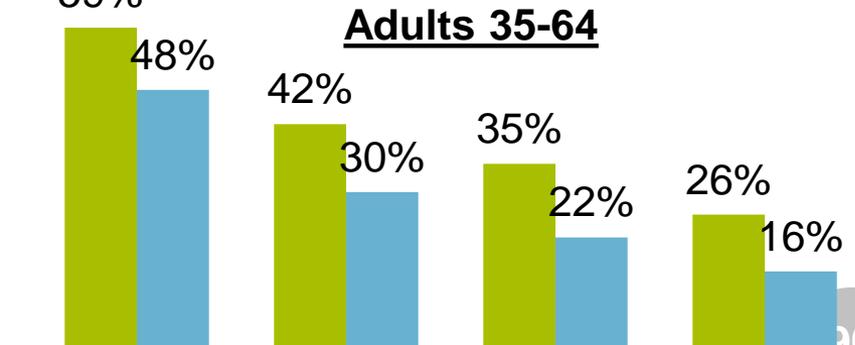
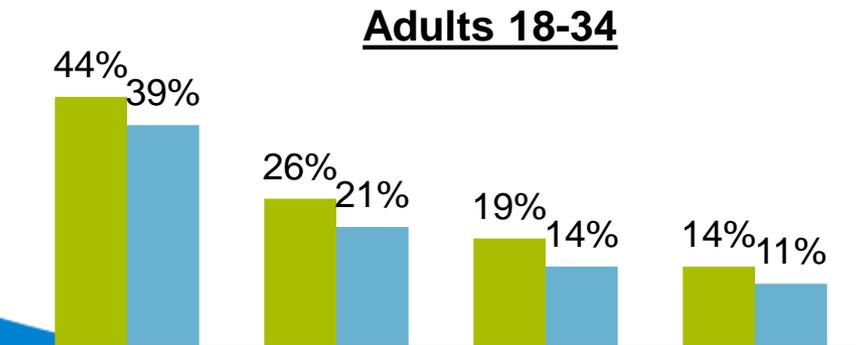
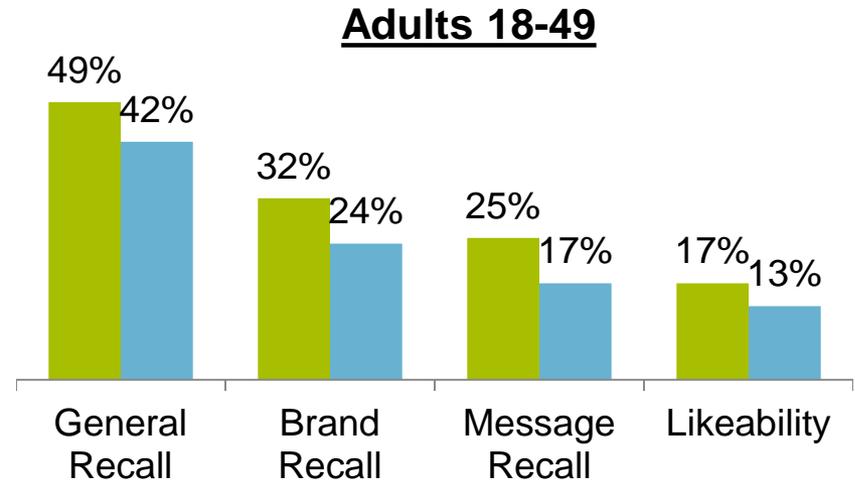
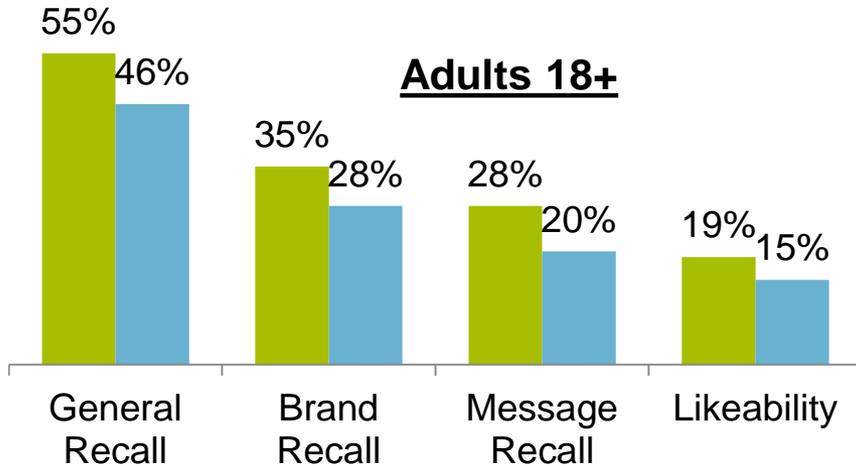


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 Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
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 Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary

# Duplication: Prior Exposure to Short Form Online Video Ads Makes TV More Effective

■ TV + Prior Online Video Ad Exposure in Short Form Video

■ TV Commercials Only (Total)



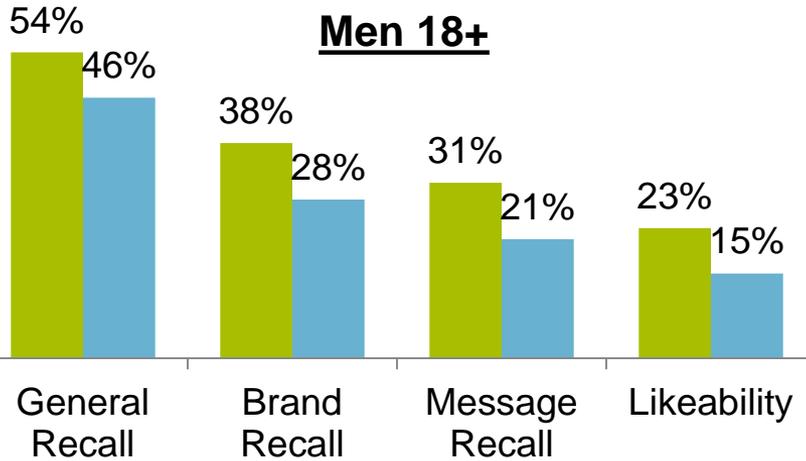
# Duplication: Prior Exposure to Short Form Online Video Ads Makes TV More Effective



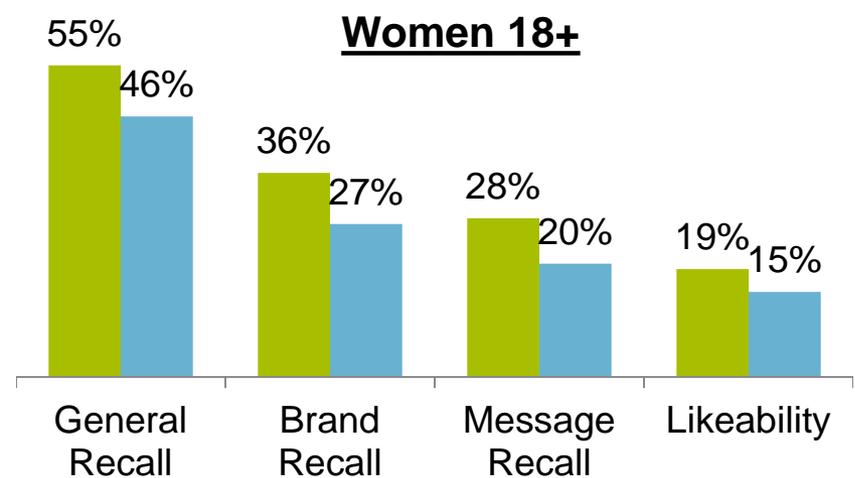
■ TV + Prior Online Video Ad Exposure in Short Form Video

■ TV Commercials Only (Total)

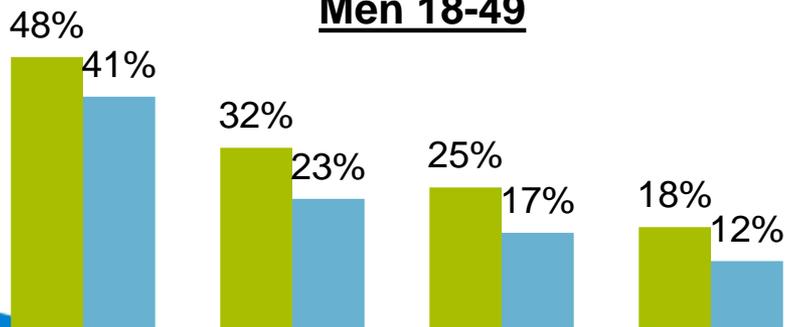
## Men 18+



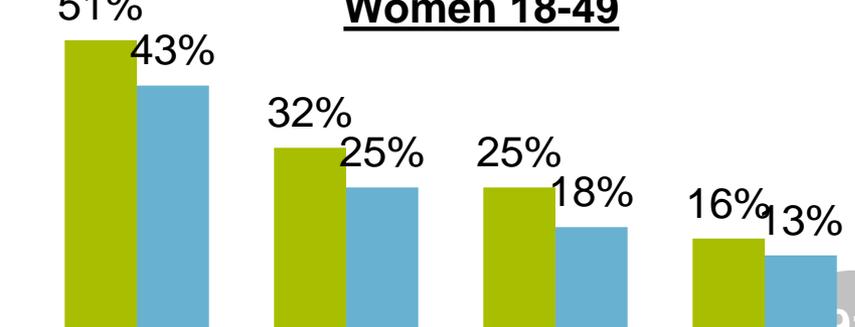
## Women 18+



## Men 18-49



## Women 18-49



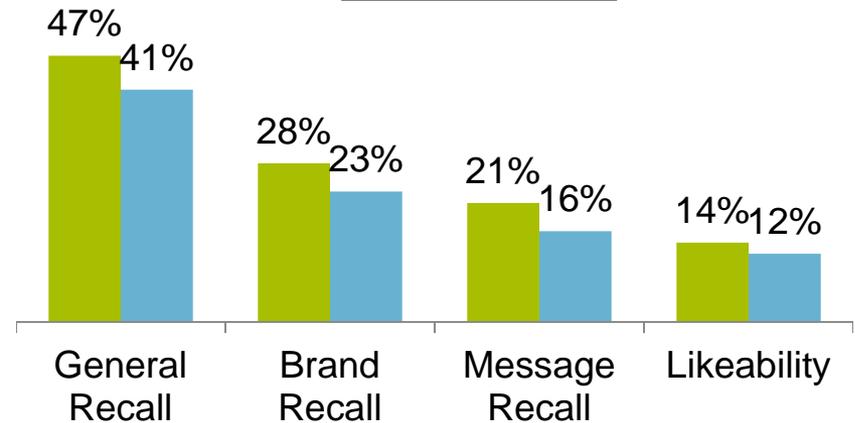
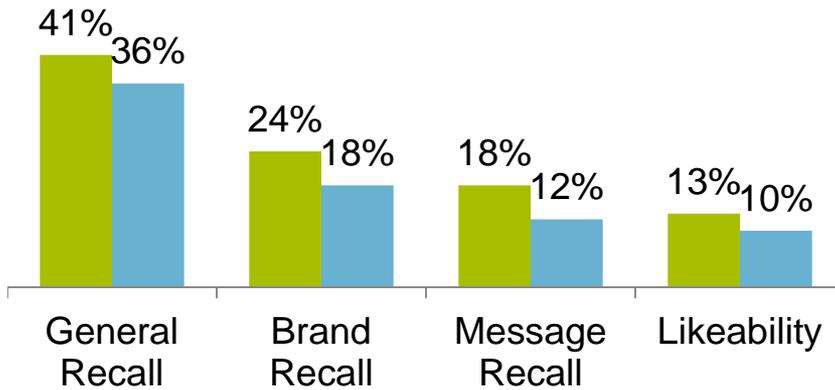
# Duplication: Prior Exposure to Short Form Online Video Ads Makes TV More Effective

■ TV + Prior Online Video Ad Exposure in Short Form Video

■ TV Commercials Only (Total)

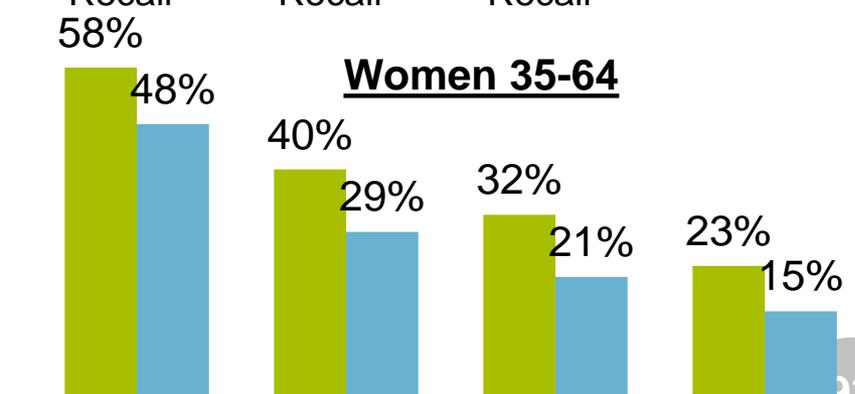
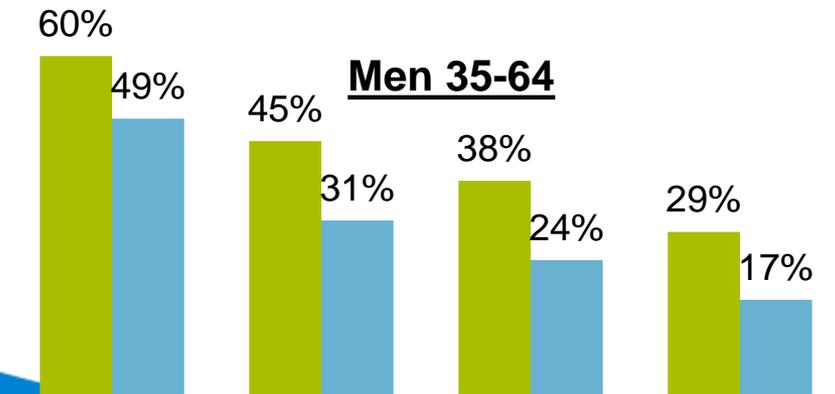
## Men 18-34

## Women 18-34



## Men 35-64

## Women 35-64

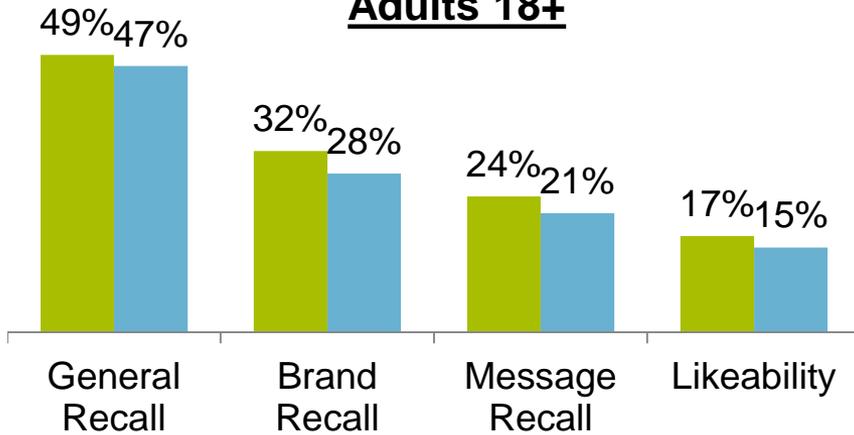


# Short Form Online Video is More Effective Than TV Across Demos

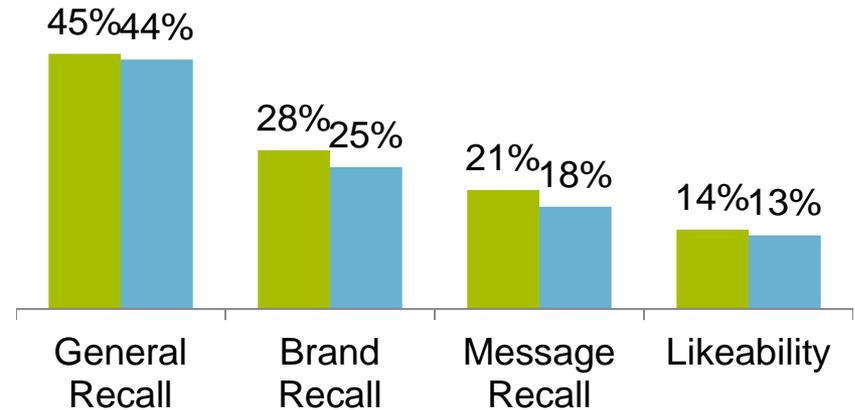
■ Video Ads in Short Form Video Online

■ Standard TV Commercials (Total)

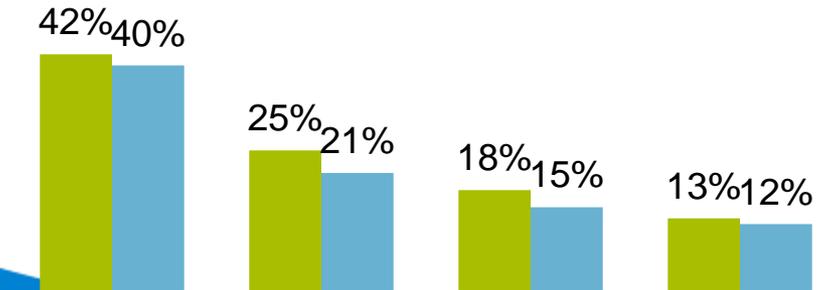
## Adults 18+



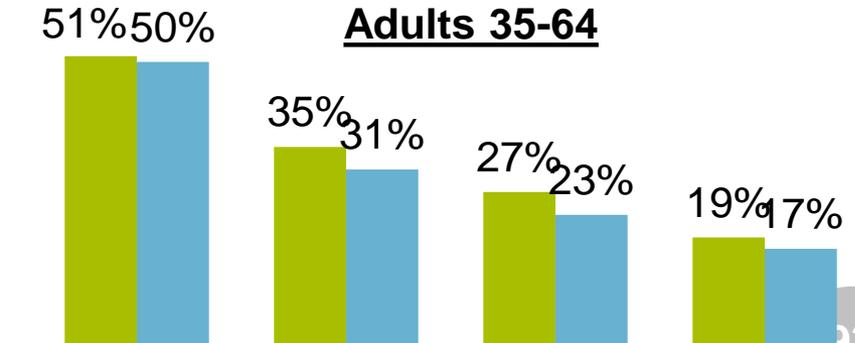
## Adults 18-49



## Adults 18-34



## Adults 35-64

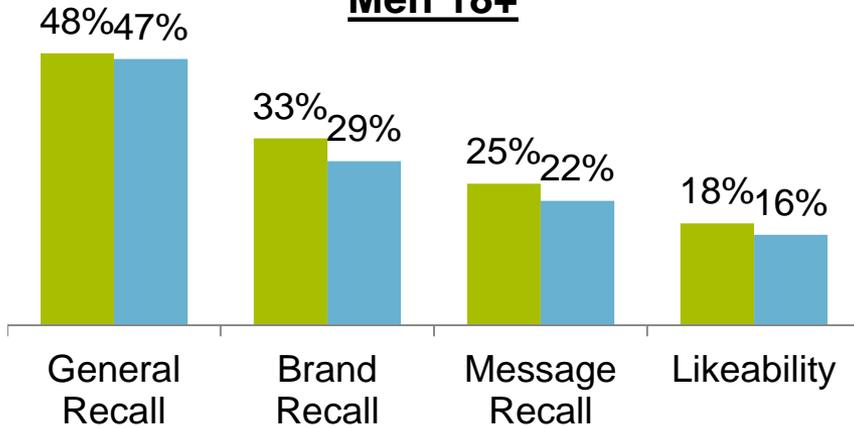


# Short Form Online Video is More Effective Than TV Across Demos

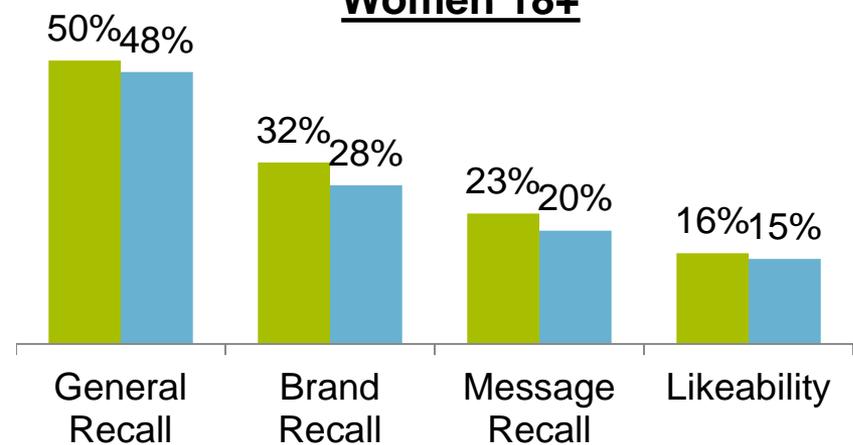
■ Video Ads in Short Form Video Online

■ Standard TV Commercials (Total)

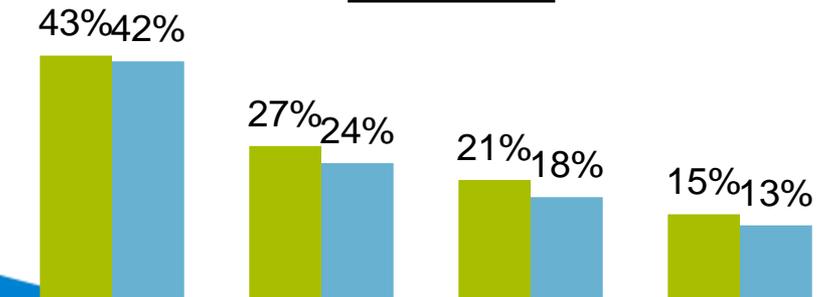
## Men 18+



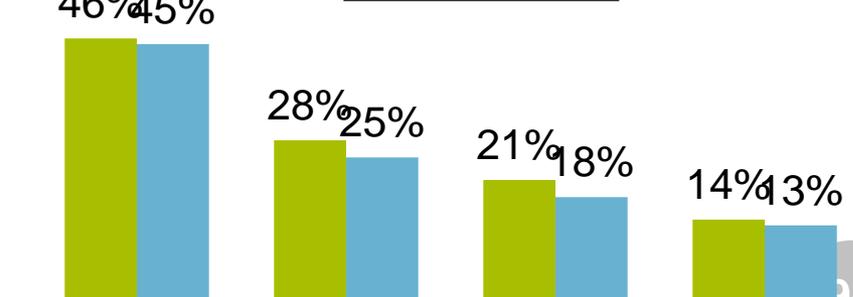
## Women 18+



## Men 18-49



## Women 18-49



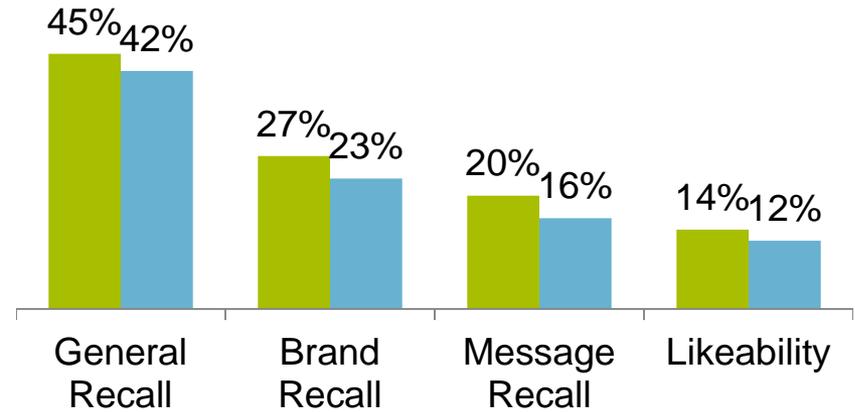
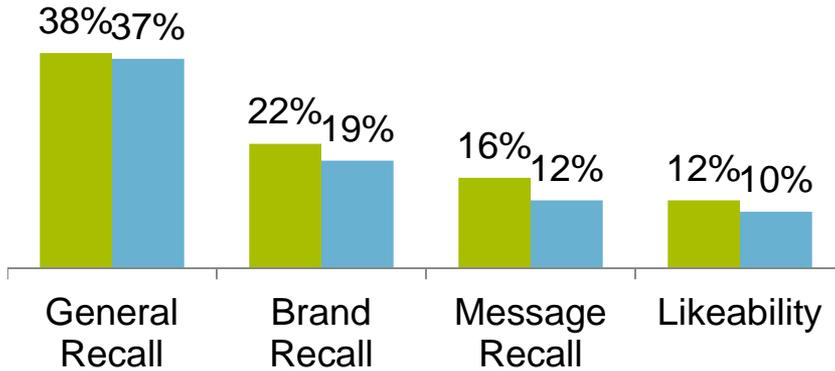
# Short Form Online Video is More Effective Than TV Across Demos

■ Video Ads in Short Form Video Online

■ Standard TV Commercials (Total)

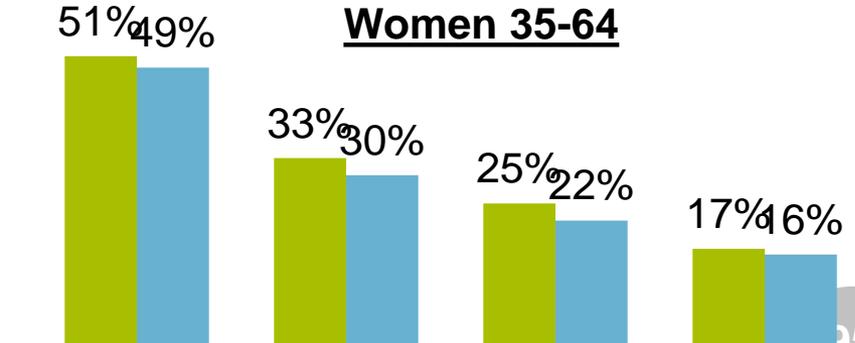
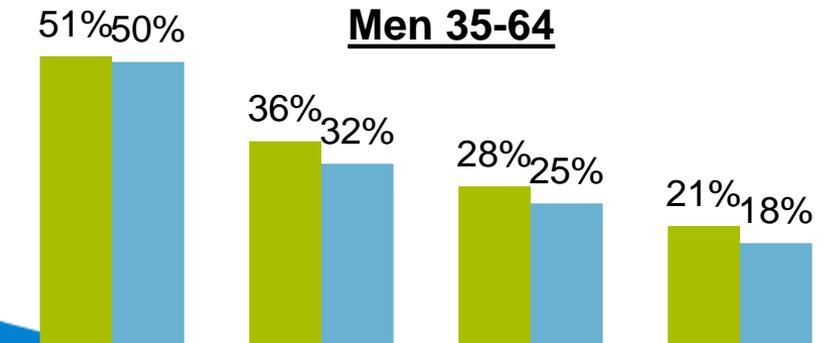
## Men 18-34

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## Men 35-64

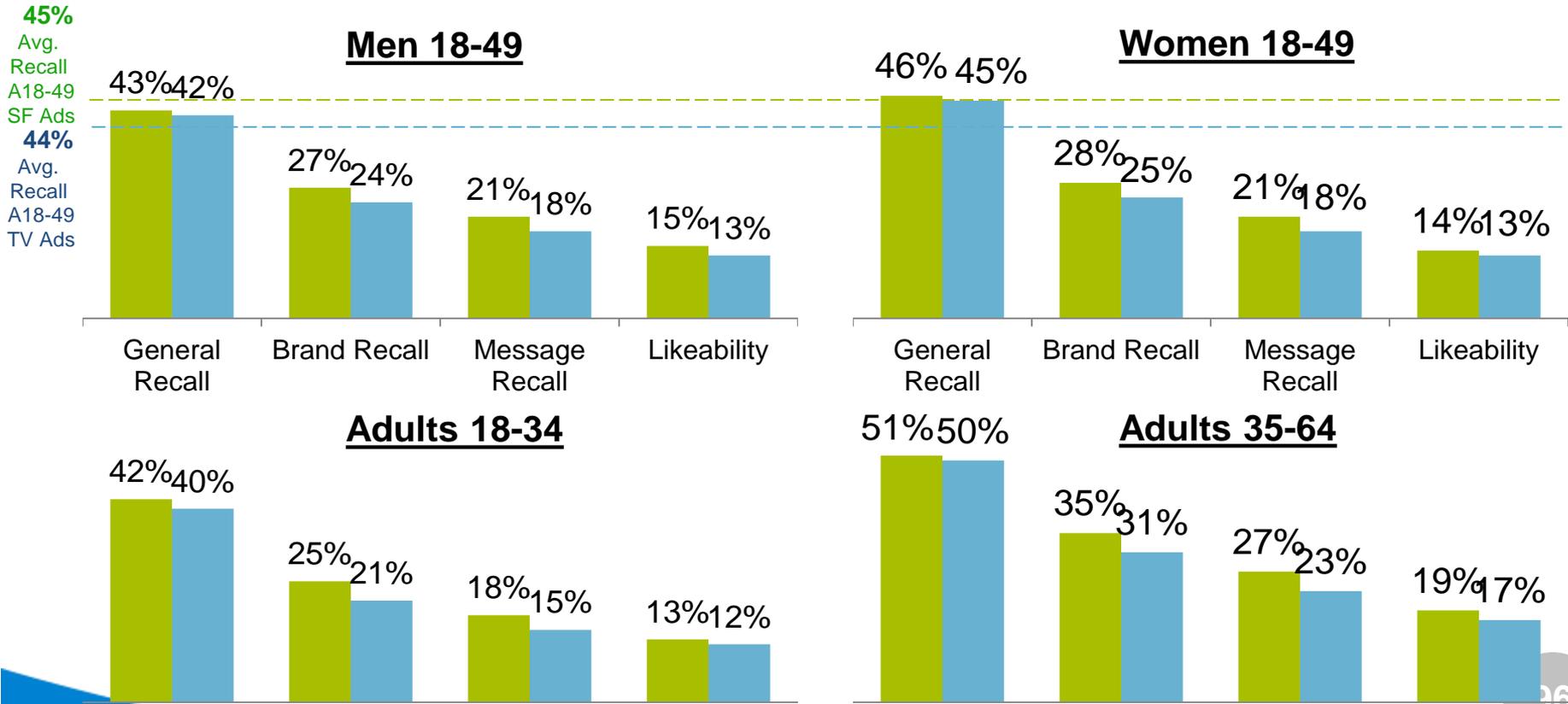
## Women 35-64



# Short Form Online Video is More Effective Than TV Across Demos

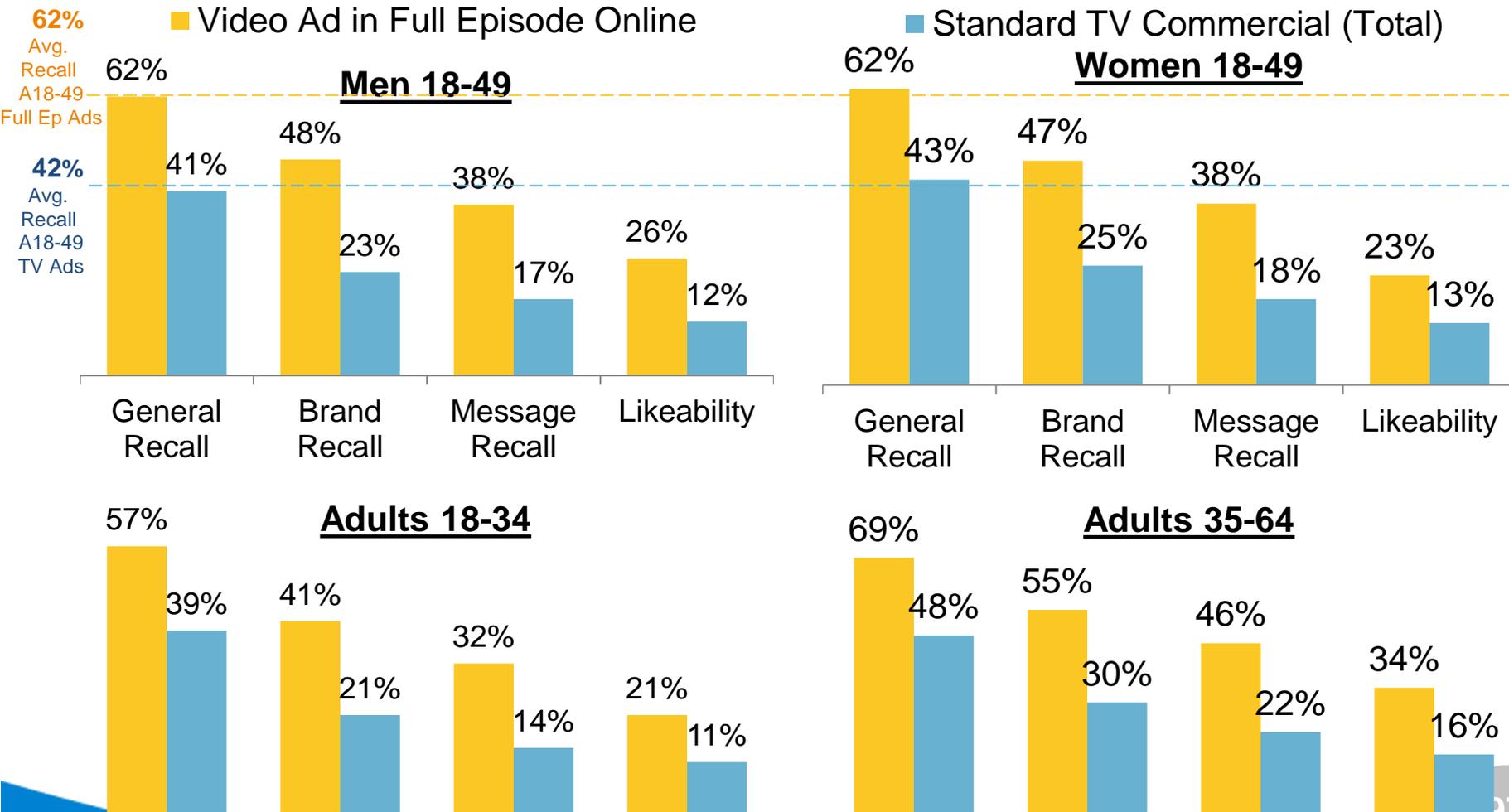
■ Online Video Ad in Short Form Video

■ Standard TV Commercial (Total)

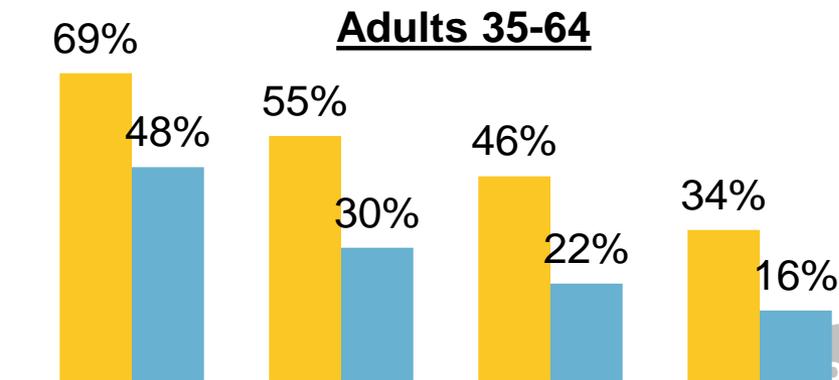
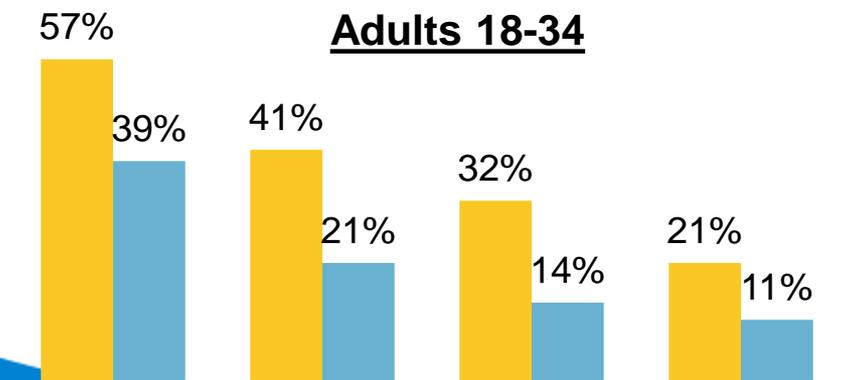
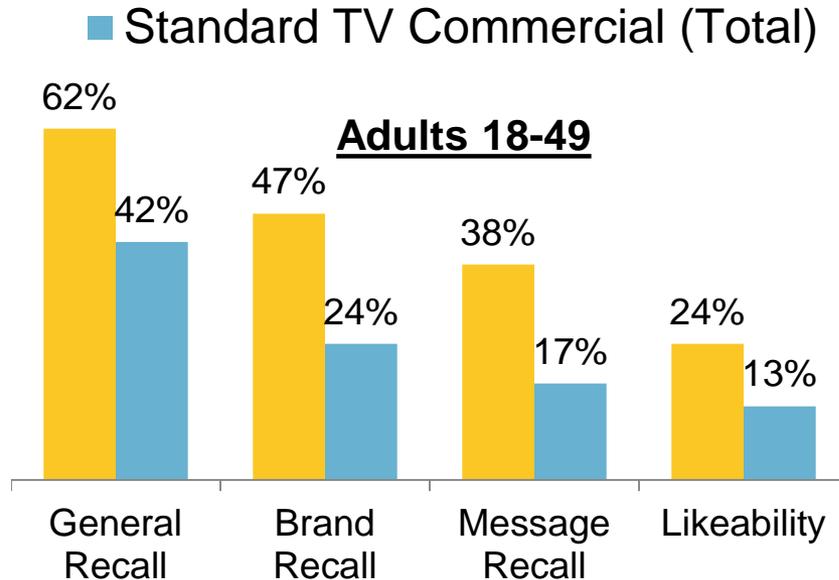
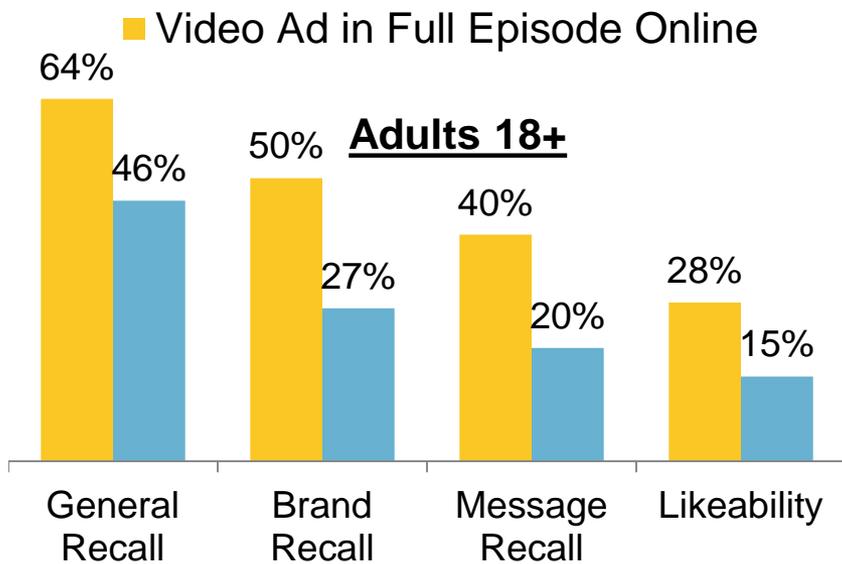


45%  
Avg.  
Recall  
A18-49  
SF Ads  
44%  
Avg.  
Recall  
A18-49  
TV Ads

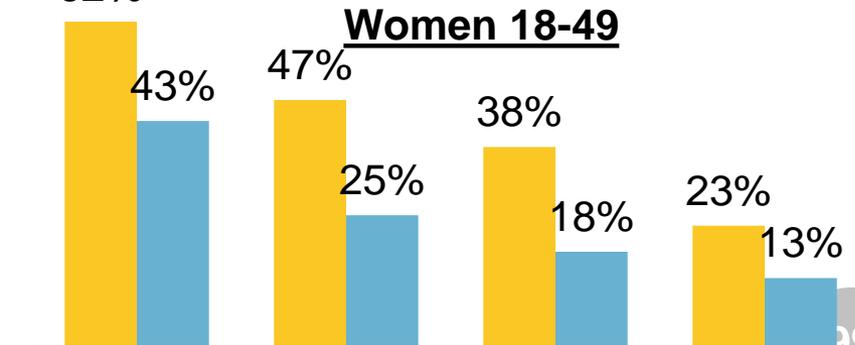
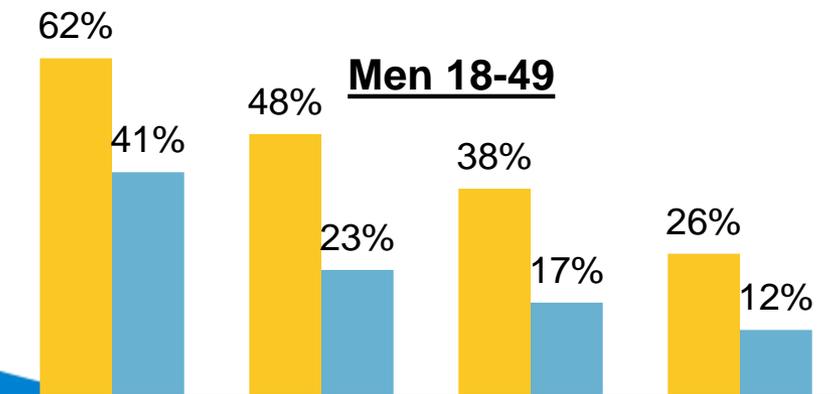
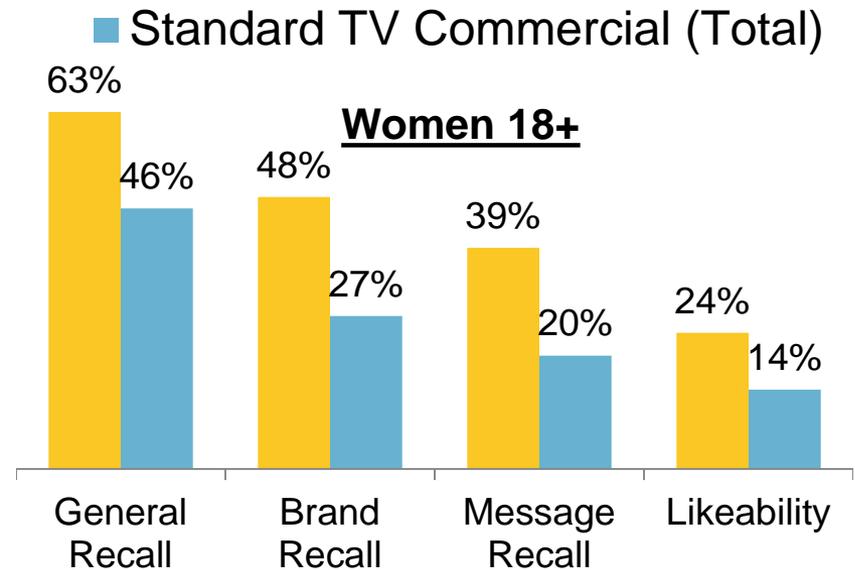
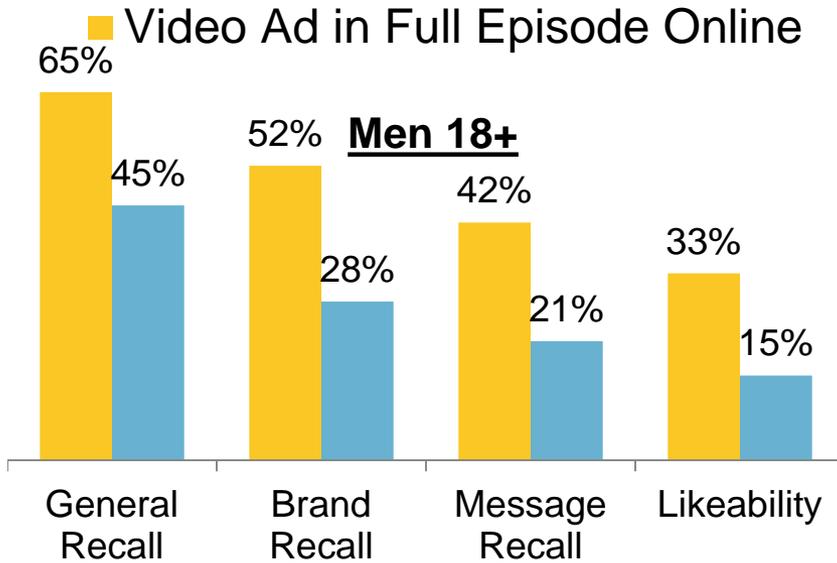
# Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV



# Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV



# Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

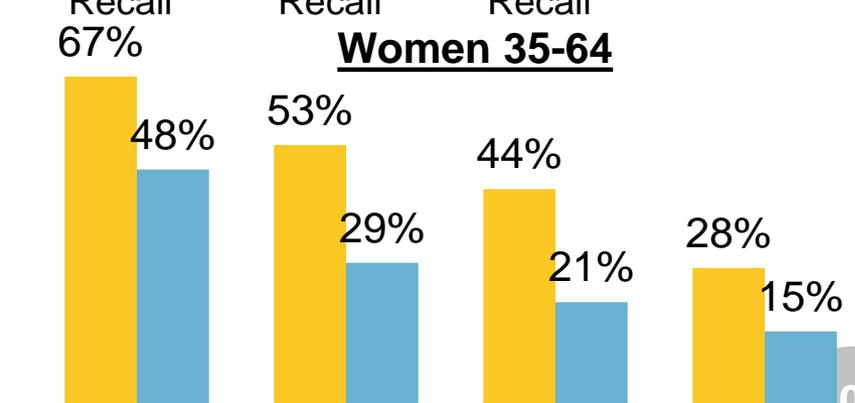
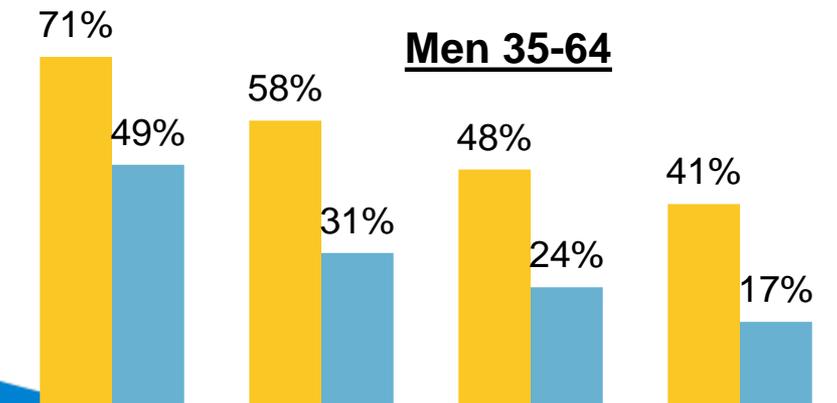
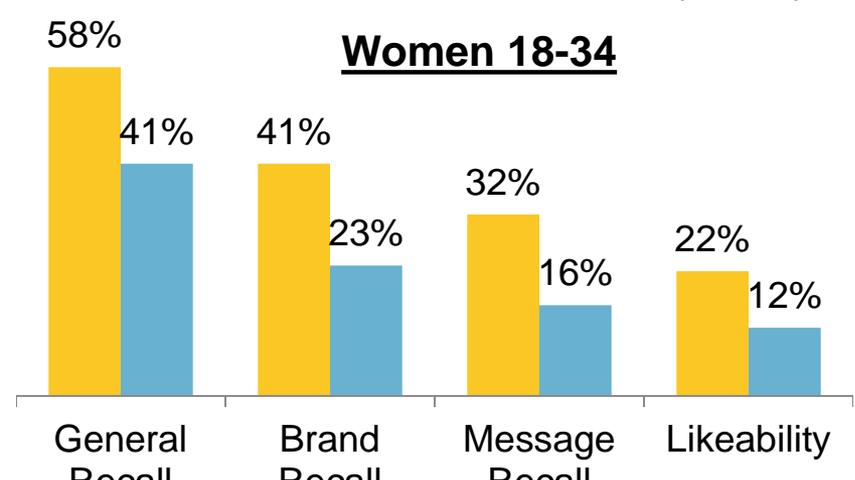
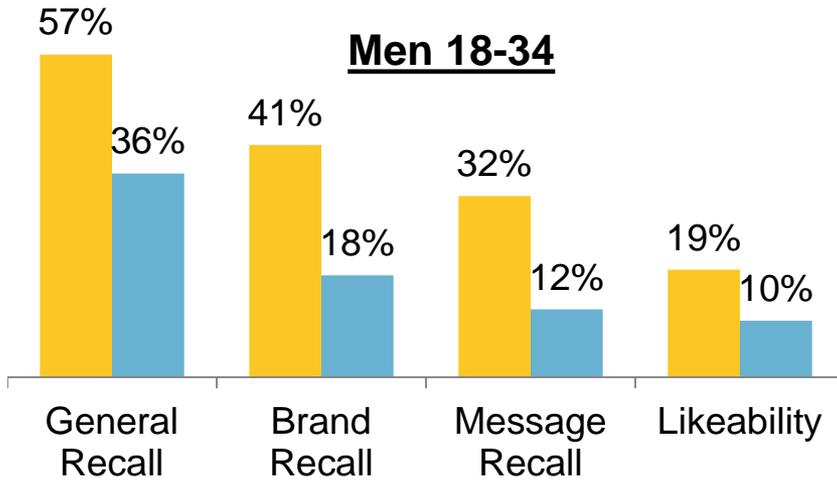


Standard TV includes TV ads on both cable and broadcast networks . Primetime, non-sports  
 Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Green arrows indicate a positive difference at >90% confidence  
 Online & TV data based on responses up to 1 day post-ad stream  
 Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary

# Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

■ Video Ad in Full Episode Online

■ Standard TV Commercial (Total)

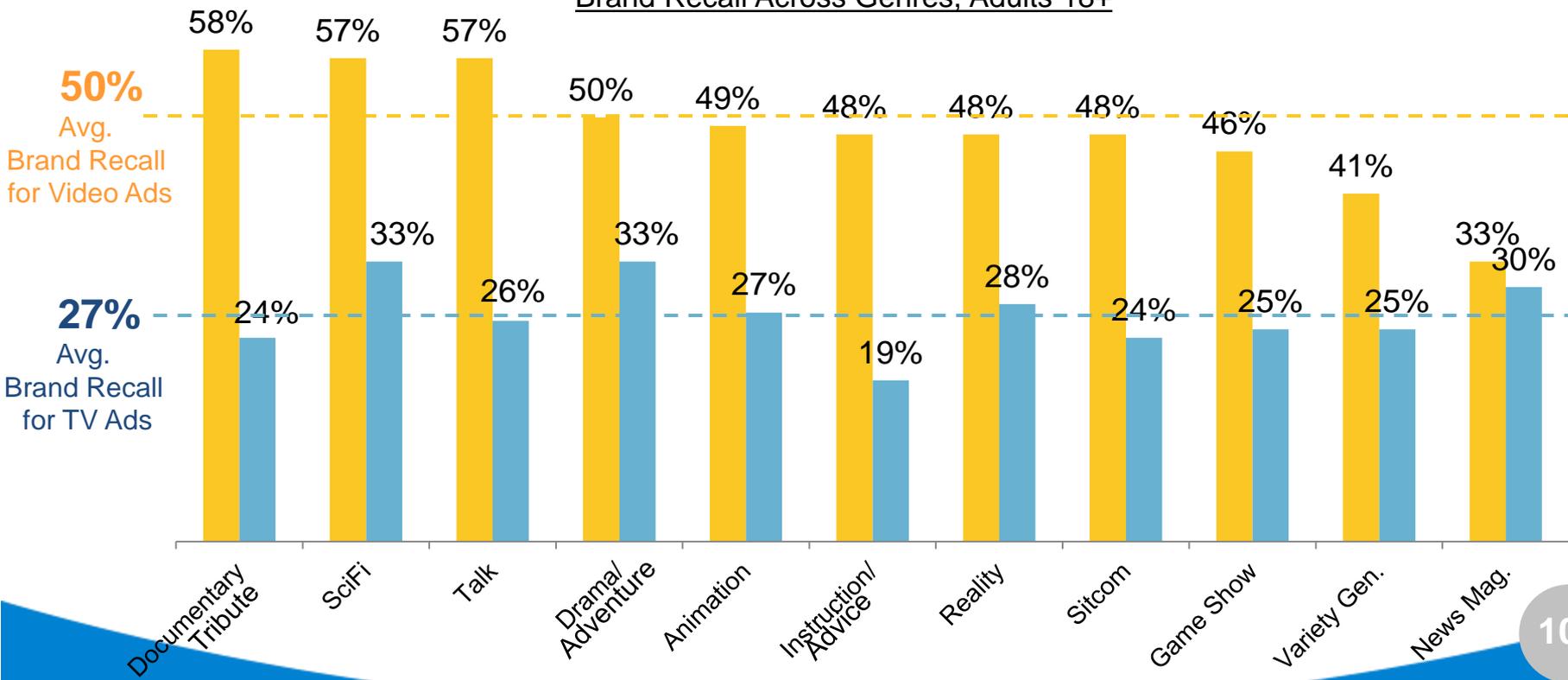


# Across Genres, Nearly Twice as Many Recall the Brand Advertised in Online Video Than on TV

- Roughly Half Recall the Brand Online vs. 1 in 4 on TV
- Online Documentaries, Science Fiction and Talk Especially Outperform TV

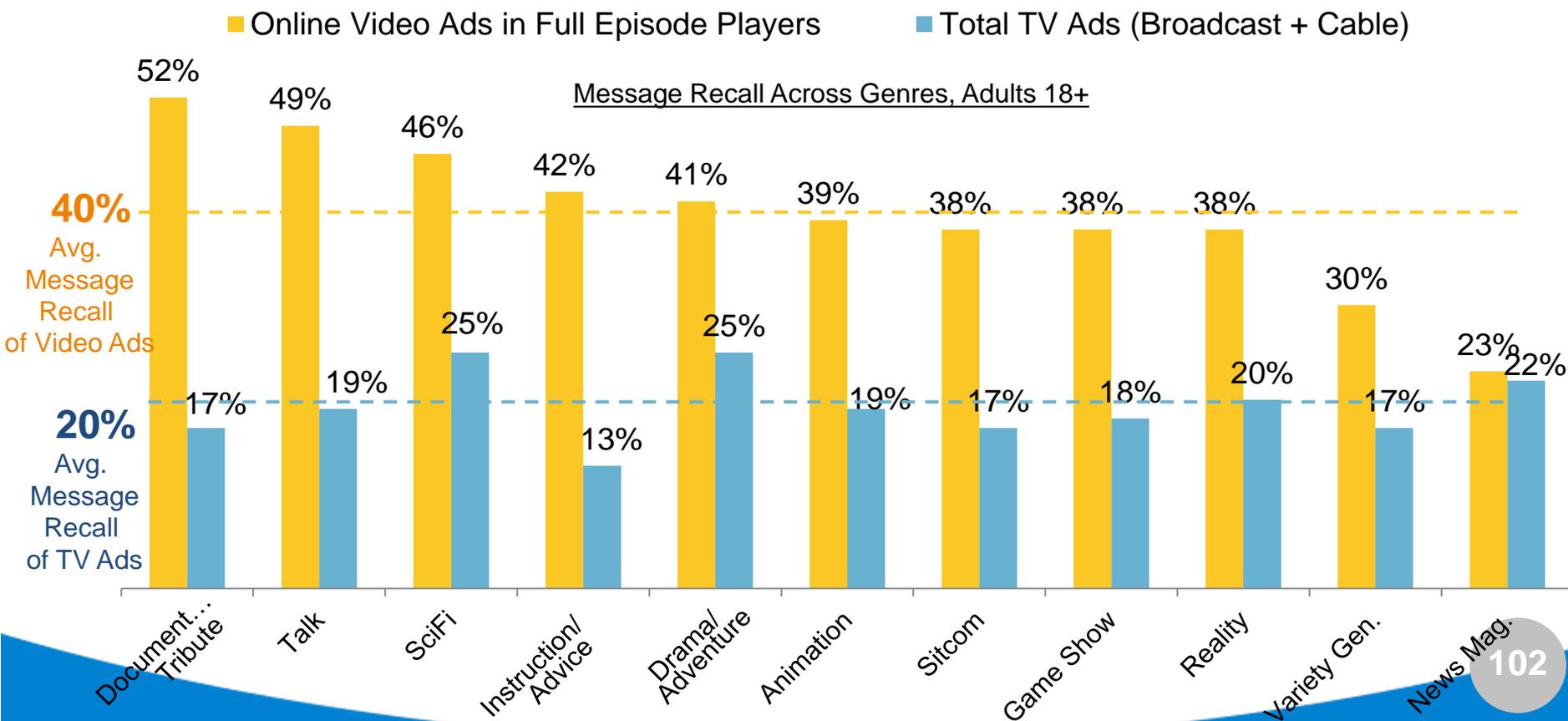
■ Online Video Ads in Full Episode Players    ■ Total TV Ads (Broadcast + Cable)

Brand Recall Across Genres, Adults 18+



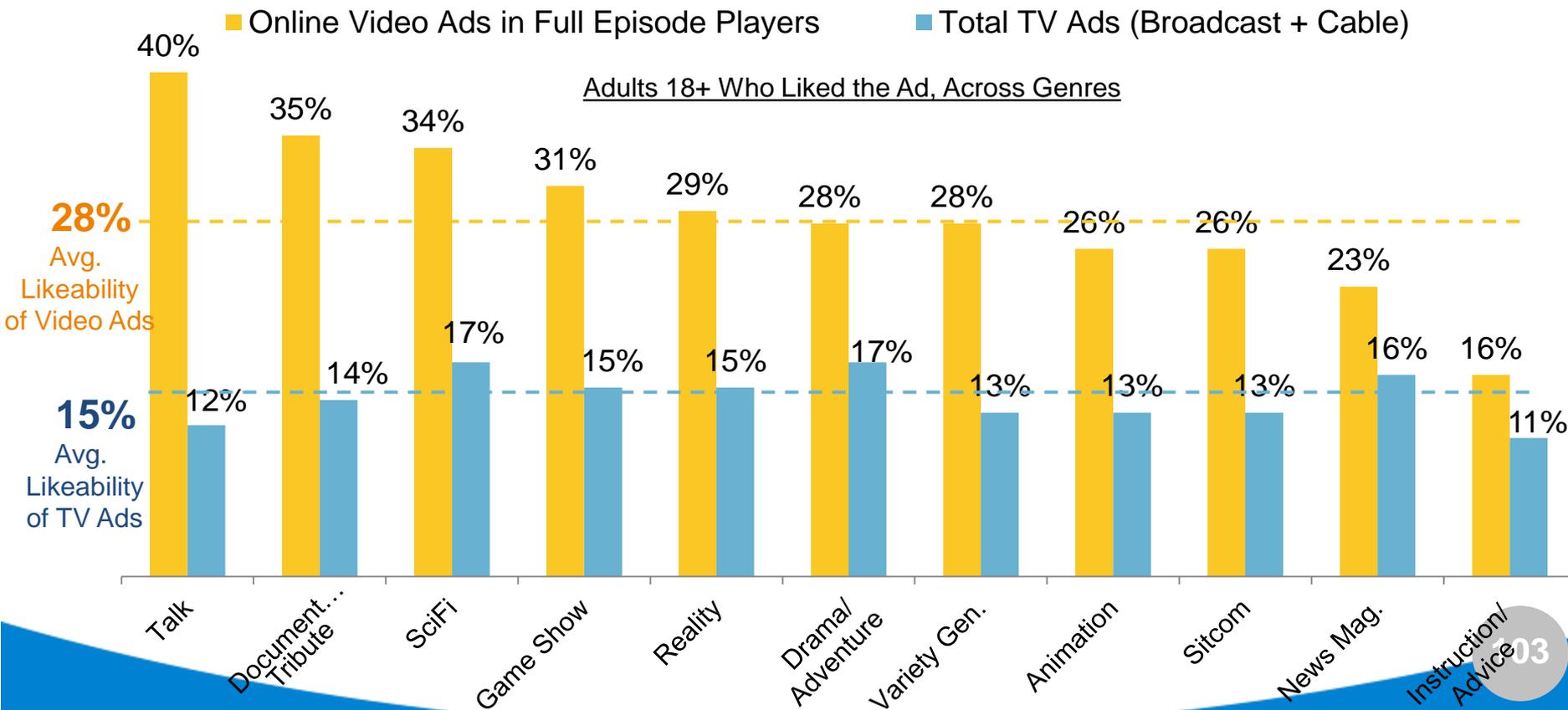
# Across Genres, the Ad's Message is More Memorable in Online Video Ads Than TV Ads

- Ads in Documentaries and Instructional Videos are Three Times More Effective Online



# Across Genres, Online Video Ads Are More Likeable Than TV Ads

- Online Ads in Talk Shows are Three Times More Likeable Than on TV
- Ads in Most Genres are Twice as Likeable Online

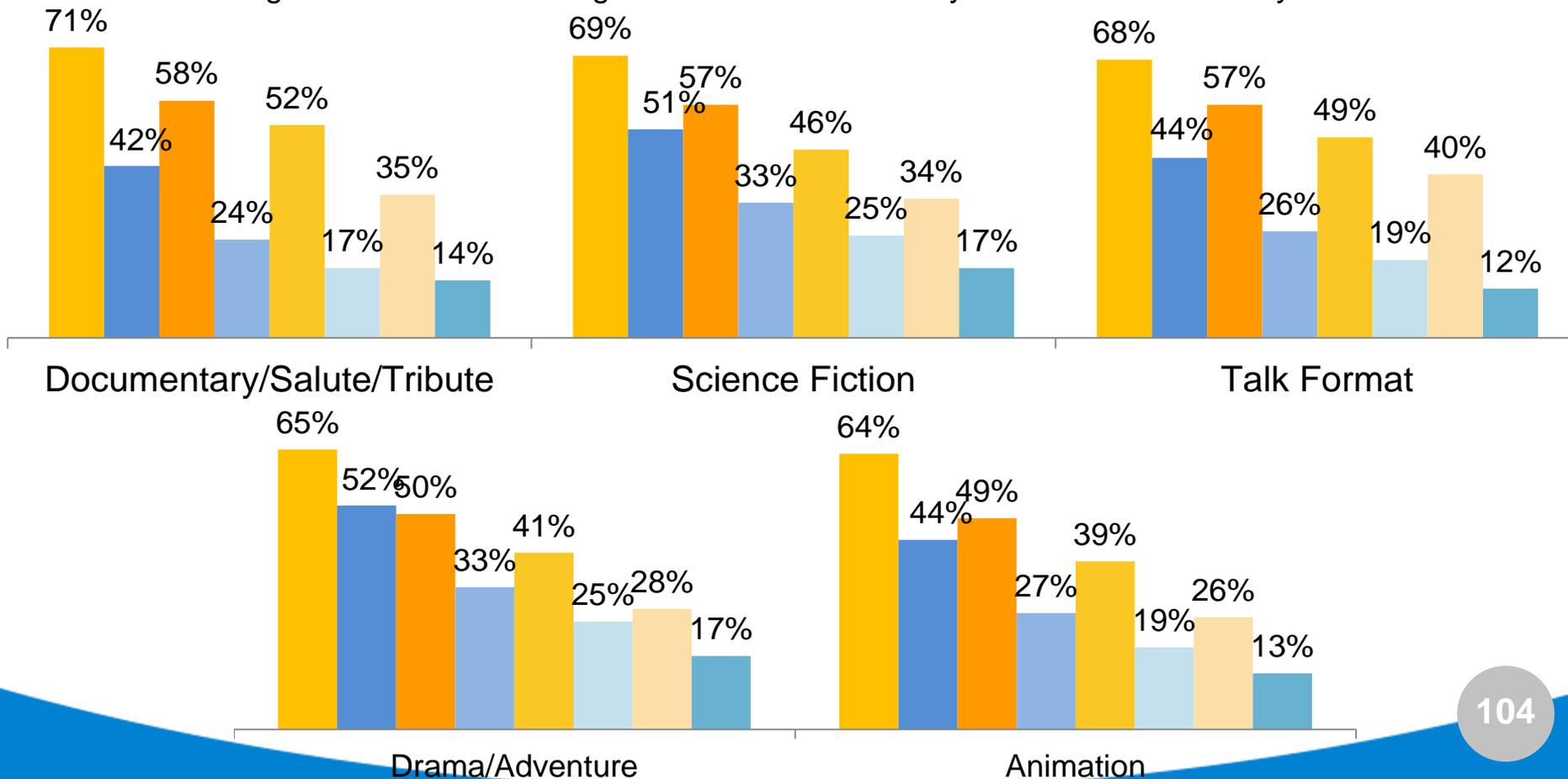


# Top Genres for Online Video Ad Effectiveness



## Video Ad on an Online Full Episode Player vs. TV Commercial

- General Recall FEP ■ General Recall TV ■ Brand Recall FEP ■ Brand Recall TV
- Message Recall FEP ■ Message Recall TV ■ Likeability FEP ■ Likeability TV



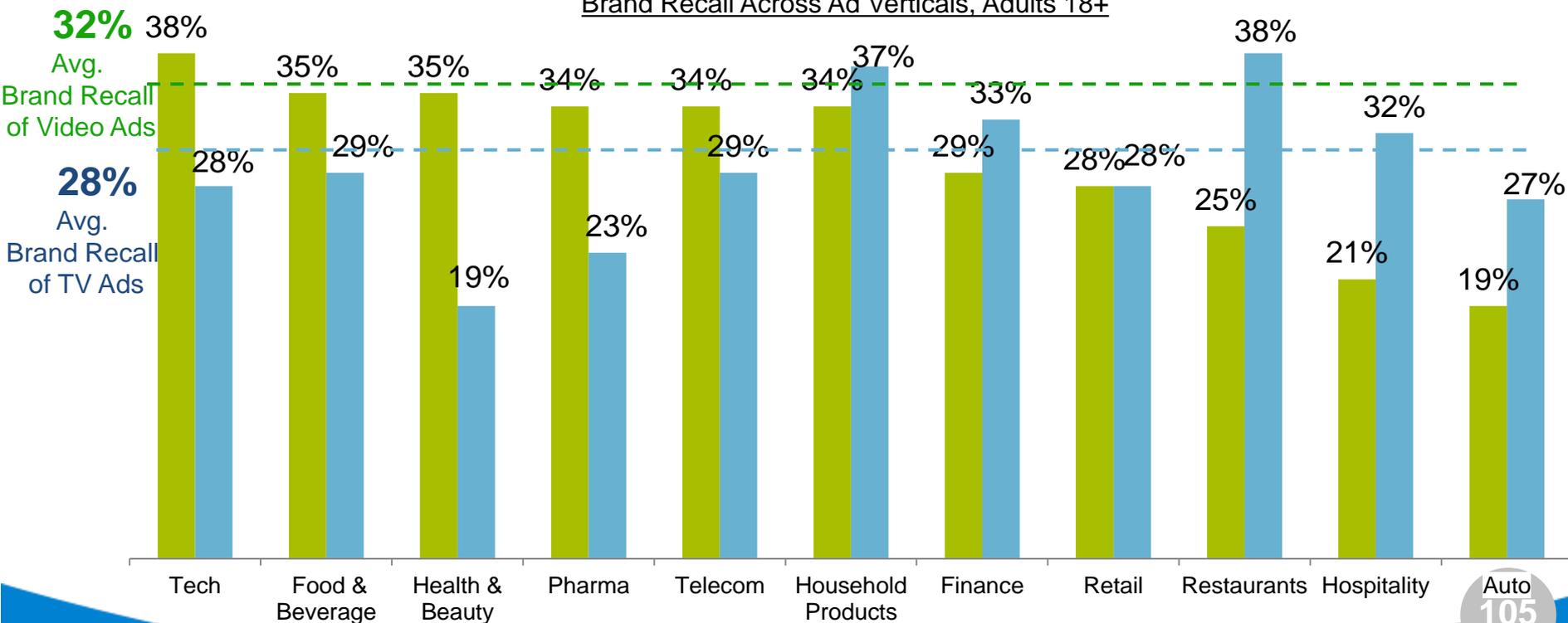
# Across Some Ad Verticals, Short Form Online Video Brands Are More Memorable Than TV Ads



- Tech, Food & Beverage, Health & Beauty, Telecom and Pharma Video Ads Online Significantly Outperform TV Commercials

■ Video Ads in Online Short Form Video    ■ TV Commercials (Broadcast + Cable)

Brand Recall Across Ad Verticals, Adults 18+



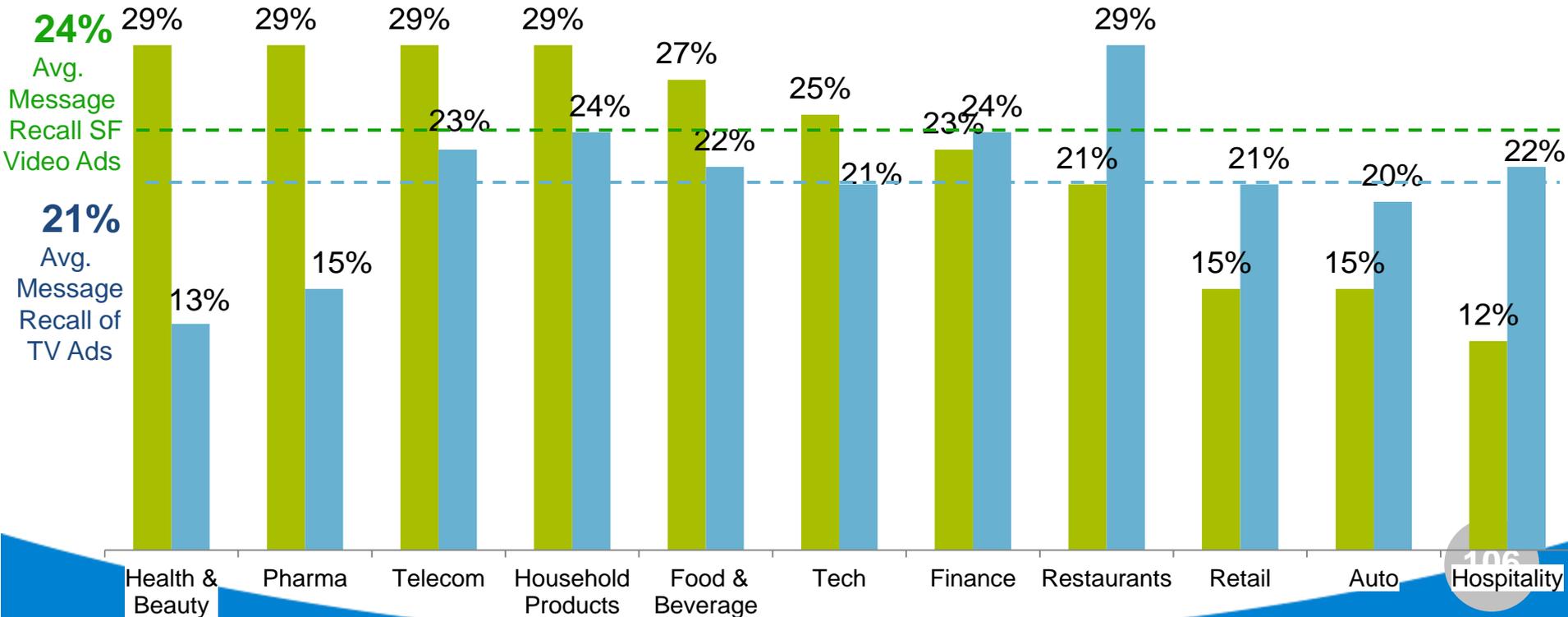
# Across Some Ad Verticals, Short Form Online Video Messages Are More Memorable Than TV Ads



- Health & Beauty, Pharma, Telecom, Household Products, Food & Beverage and Tech Categories Significantly Outperform TV
- Online Video Ads for Health & Beauty and Pharma Have About Twice the Message Recall of TV Commercials

Message Recall Across Ad Verticals, Adults 18+

■ Video Ads in Short Form Online Videos    ■ TV Commercials (Broadcast + Cable)



Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+  
 Online & TV data based on responses up to 1 day post-ad exposure  
 Limited to the same brands that streamed online and aired on TV  
 during the same period; specific creative executions may vary

Brand recall only asked of those who correctly recall general recall.  
 Message recall, only shown to those who correctly recall brand.  
 IAB Online Video Study

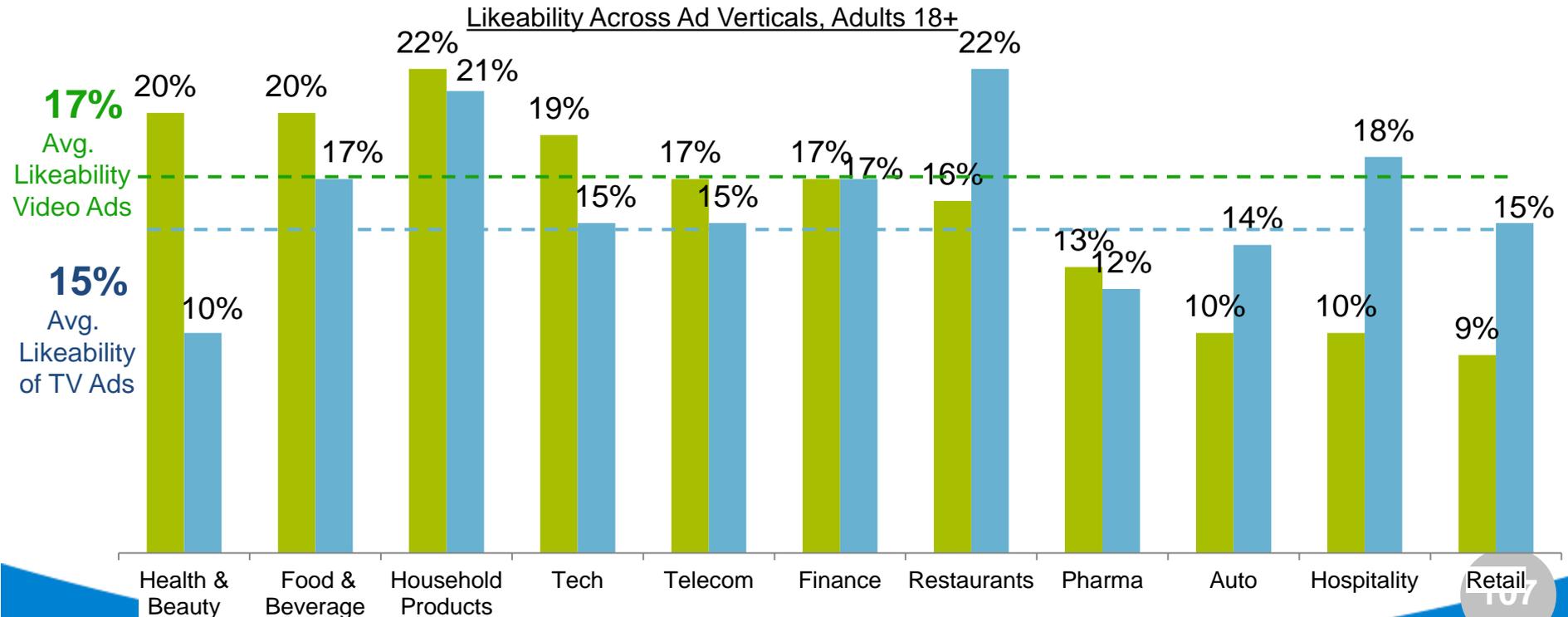
Copyright © 2012 The Nielsen Company. Confidential and proprietary.

# Across Some Ad Verticals, Short Form Online Video Ads Are More Likeable Than TV Ads

- Health & Beauty, Food & Beverage, Household Products, Tech and Telecom Ads Online Are Most Likeable
- Health & Beauty and Tech Video Ads Online Significantly Outperform TV

■ Video Ads in Short Form Online Video      ■ TV Commercials (Broadcast + Cable)

Likeability Across Ad Verticals, Adults 18+



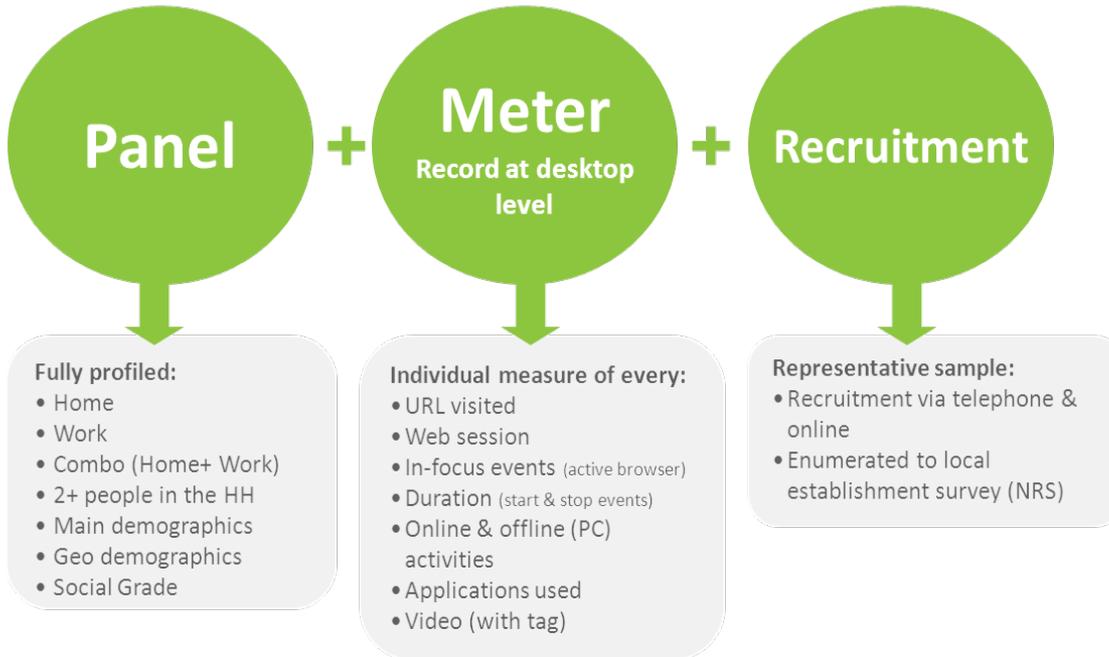
# Methodology Overviews



# Nielsen Panel Methodologies

# Nielsen Online NetView Panel

*200,000+ monthly panelists with a passive meter capturing all internet connected activity. Measurement captures both Home and Work usage.*

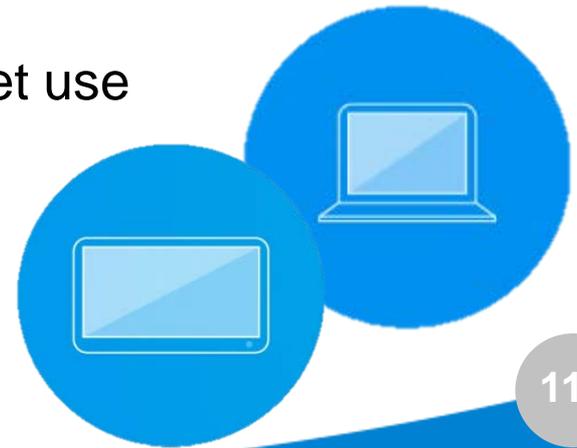


## Meter capabilities include:

- Web measurement
- Applications Tracking
- Device Measurement
- Streaming Media
- Audio Measurement
- SiteCensus Data
- Page Content
- Full URL detail
- Search terms

# Nielsen Cross Platform Homes Panel – Single **iab.** Source

- Panel of 10,000 Households (25,000 panelists) ages 2+ with both National TV People Meters and NetView PC meters installed in their homes
- Panelists are in the panel for a maximum of 2 years
- Allows broad analytics on TV and Internet usage – surfing and streaming
  - Internet usage restricted to in home internet use



# Nielsen's TV/Internet Data Fusion Methodology

*TV/Internet fusion links Nielsen's 200,000 person NetView Online panel, with the 50,000 person National People Meter Television Panel*

Fusion links one TV panelist with one  
Online panelist



Age and gender as critical cells  
("must-match" criteria)

A carefully selected list of other  
demographic variables including:

- Presence of children 2-11
- Presence of children 12-17
- Education
- Household Size
- Household Income
- Zip Code
- Race

## TV Panelist

### Clara

35 years old  
NYC  
Presence of  
children 2-11  
≈ 10 hrs online/wk

## Online Panelist

### Sara

35 years old  
NYC  
Presence of  
children 2-11  
≈ 10 hrs online/wk

Home and work Internet usage data  
collected via surveys will also be  
used as hooks during the fusion

# Video Brand Effect Methodology

# Nielsen Video Brand Effect measures advertising and engagement across media platforms

- Enables understanding of integrated campaign effectiveness

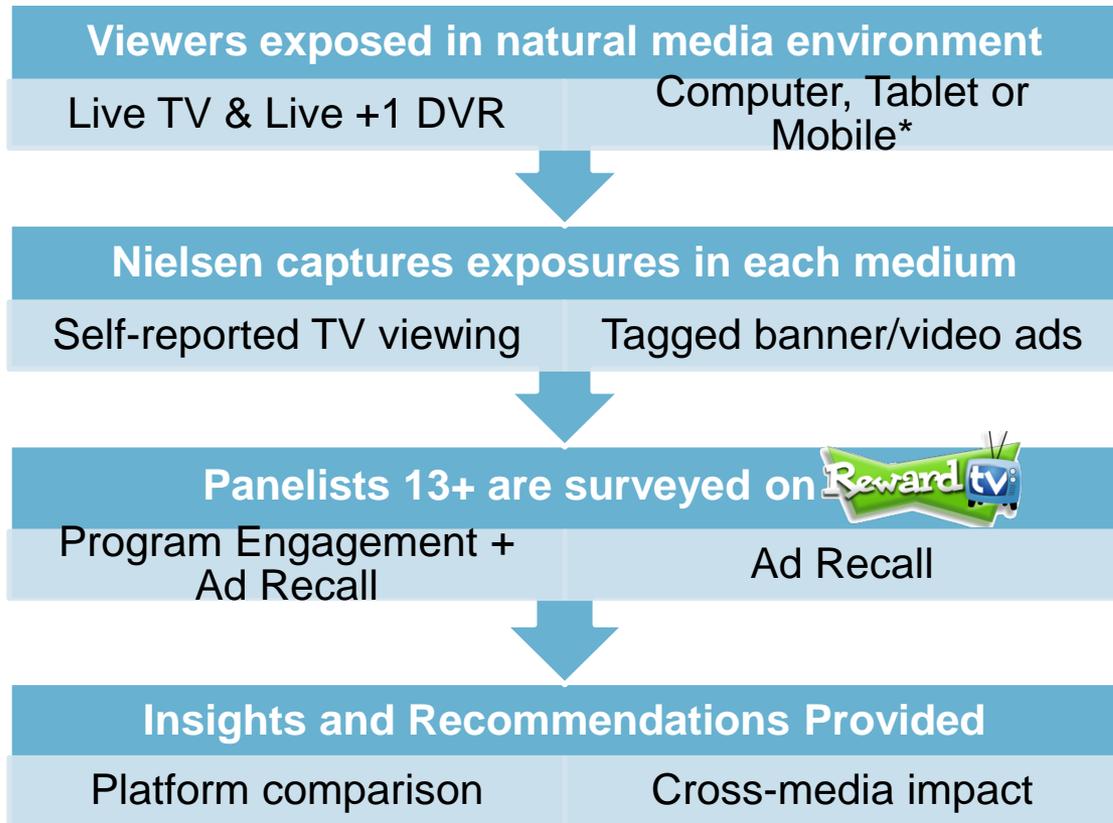


# Video Brand Effect addresses a variety of strategic questions



- How does the advertiser's pre-roll or in-stream ads perform against Online Video and TV ad effectiveness norms?
- What is the "amplifying" effect of the advertiser's online video ad campaign on their concurrent TV campaign?
- How does frequency of exposure impact Online Video campaign effectiveness?
- What role does frequency of exposure play across platforms?
  - For example, is there greater impact when an advertiser's target consumer is exposed to your campaign twice on TV and twice in online video versus being exposed all four times on TV?
- How are your microsites performing relative to your primary Web properties?

# Real-world media consumption, real-time measurement



RewardTV is the data engine for Nielsen Video and TV Brand Effect. It's an on-line research panel positioned to consumers as a TV/Video trivia website.



# Brand Effect (IAG) data collection

1. Panelists log in to RewardTV.com
2. Select the shows they watched on TV (P1D) /Online (P7D)
3. Answer questions about the TV and Online **shows** they watched & the video **ads** and **placements** within
4. Answer questions about the tagged Internet ads exposed (P7D) – mostly short-form video and display
5. Earn reward points for questions they answer correctly

The screenshot shows the RewardTV website interface. At the top, there's a navigation bar with 'Play Trivia Games', 'Earn More Points', 'Rewards', 'Winners', and 'TV Buzz'. The user's account details are visible on the right, showing a total of 22,200 points and 1,400 earned today. The main content area features a 'Play Trivia for Cash and Prizes!' banner for a 'Weekly Movie Quiz' where users can win a month of movie tickets. Below this is a table titled 'SELECT SHOWS YOU WATCHED YESTERDAY' with columns for Show Name, Aired, and Network. A 'PLAYLIST - Currently Selected Shows' section is also visible, listing shows like 'New Girl - Krypton...', 'Top Shot - Tricked ...', and 'The Real Housewives of Be...'. The bottom of the page includes a footer with 'Rules | Membership Agreement | Privacy Policy | Help' and a copyright notice for 2012 The Nielsen Company.

*“Soft” incentives do not alter viewing behavior. People participate because it’s a fun extension of their TV-viewing experience!*

# Survey Process: Like TV, panelists select an online show on which to take a survey

The screenshot displays the Reward TV website interface. At the top, there are social media icons, a language selector (English/Español), and a user account section for 'cara.kantrowitz@nielsen...' with options for 'My Account', 'Help', and 'Sign Out'. The 'ACCOUNT DETAILS' section shows 'Points Total: 6,400' and 'Earned Today: 0'. A navigation bar includes 'Play Trivia Games', 'Earn More Points', 'Rewards', 'Winners', 'TV Buzz', and 'Share'. A prominent banner reads 'Play Trivia for Cash and Prizes!'. On the left, a 'SPOTLIGHT' sidebar lists various survey categories with 'TAKE SURVEY' buttons: 'QUICK QUESTIONS EARN 5,000 POINTS', 'ROAD TEST EARN 7,500 POINTS', 'ABOUT TELEVISION EARN 2,500 POINTS', 'QUICK QUIZ EARN 2,500 POINTS', and 'TECHNOLOGY TODAY EARN 7,500 POINTS'. The main content area features a 'SELECT SHOWS YOU'VE WATCHED' section with tabs for 'ON TV YESTERDAY' and 'ONLINE'. A table lists shows, with 'The Great Food ... - New ...' selected. Below this, a 'PLAYLIST' section shows 'The Great Food Truck Race - New York Plate of Mind' as the 'GAME IN PROGRESS'. The central focus is a survey question: 'For 100 Points: In an advertisement during this show, what happened after an envelope opened to reveal cut out paper scenes, and people sent messages between wireless devices using an email service?'. Four multiple-choice options are provided: A) Man on a boat released a paper airplane that flew to a woman jogging in a park; B) Twins folded a large paper fan and used it to blow words to their father in his office; C) Boy created a string of paper cranes that stretched towards a girl in a classroom; D) New parents made a festive paper chain that wound down a street to a cousin's house. The interface also shows a progress indicator '7 OF 9', a score of 'SCORE: 200', and a 'Switch Play Mode to Basic' button.

# Standard Ad Questions

## General Recall

- **In a commercial during this show, who did a wireless provider encourage people to send greetings to, while images, including of a man with a ukulele and a smiling dog, appeared?**
- "Complete stranger" who was celebrating her one hundredth birthday
- "Adventurous guy" who was on a quest to visit all fifty states this summer
- "Inspiring girl" who had been very ill and was now one year free of cancer
- "Super parents" who had just welcomed five bundles of joy into life at once

## Brand Recall

- **What was this a commercial for?**
- Sprint
- T-Mobile
- Verizon
- AT&T



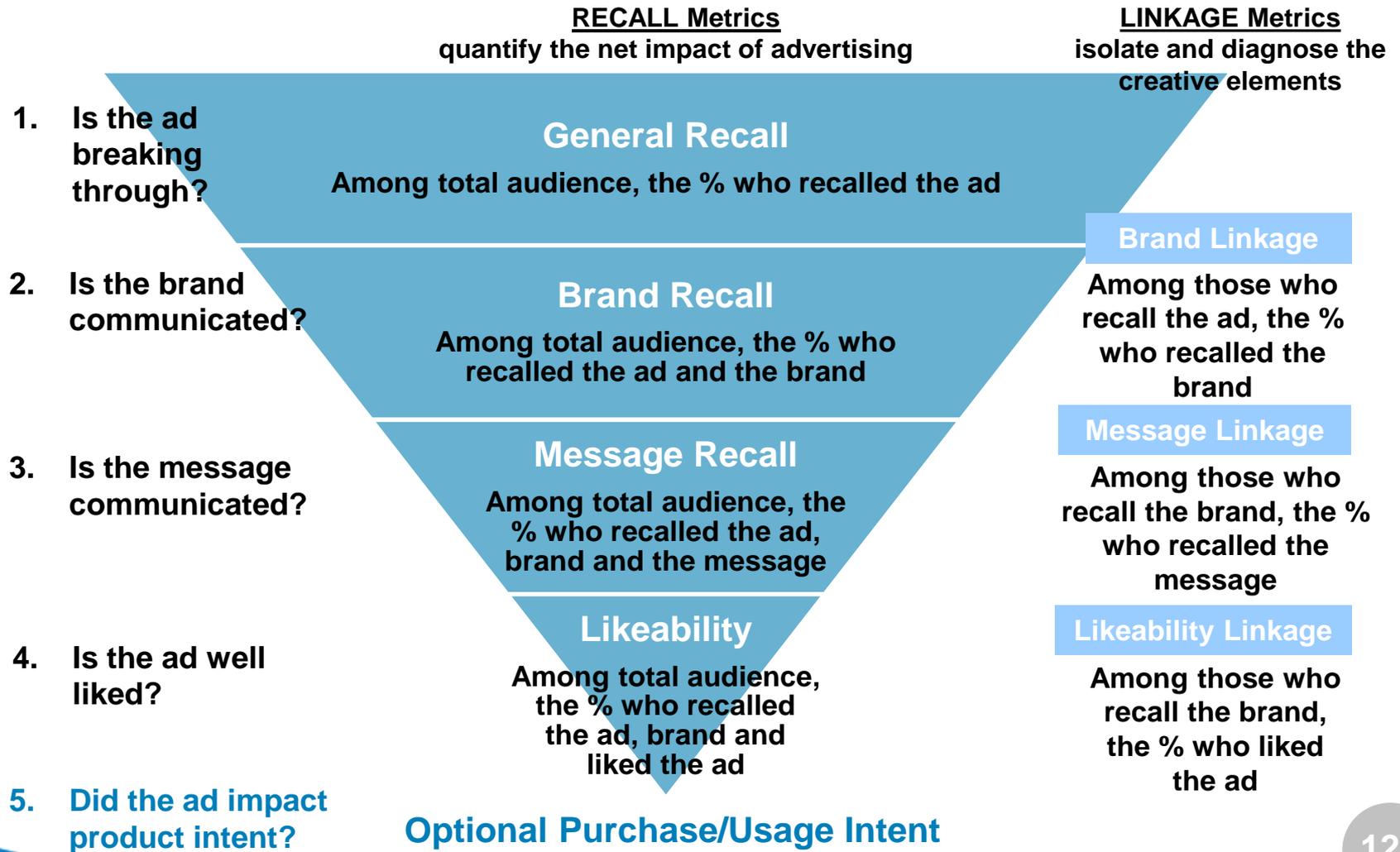
## Message Recall

- **According to this commercial, why should you sign up with Sprint?**
- Gives you unlimited calling, emailing, and texting
- Lets you pre-pay for unlimited access to services
- Offers you unlimited connection to other devices

## Likeability

- **How much did you like this advertisement?**
- I liked it a lot
- I liked it somewhat
- I am neutral about this advertisement
- I disliked it somewhat
- I disliked it a lot

# TV Brand Effect ad performance metrics defined





Brand Effect Comparison	TV Brand Effect (IAG)	Video Brand Effect (IAG)	Online Brand Effect	Mobile Brand Effect
<b>Methodology</b>	Opportunity-To-See (RewardTV)	Opportunity-To-See (RewardTV)	Test-Control (Facebook)	Opportunity-To-See + Test-Control (On-Device)
<b>Focus</b>	Break-through	Break-through	Attitudinal Impact	Break-through + Attitudinal Impact
<b>Program Engagement</b>	Yes	Yes (Long-form only)	No	No
<b>Standard Ads</b>	Yes	Yes	Yes	Yes
<b>Branded Entertainment</b>	Yes	Yes (Long-form only)	No	No
<b>Formats Measured</b>	TV	Full-Episode Video (Long-form content) + Short-form video	Online video, Display, Rich Media	Online video, Display, Rich Media
<b>Benchmarks</b>	In-stream Online Video, TV, Cross-Media Lift	Long-form Video: Video, TV Short-form video: Video, Display and TV	Online Video, Display Ads	TV, Online Video, Display Ads
<b>Tagging</b>	N/A: Self-reported	Long-form Video: Video Player Beacon Short-form video: Creative Pixel Tag	Creative Pixel Tag	Re-Targeting/UDID
<b>Exposure Response Lag</b>	Up to 1 Day	Up to 1 Day (Max. Up to 7 days)	Up to 1 Day	Up to 1 Day
<b>Required Impressions</b>	Can measure anything above 20 GRPs	15MM impressions ~ 100 survey sample (no cap)	1.5MM unique impressions ~ 600-800 survey sample per cell (up to total of 3,600 to 4,800 across cells)	Depends on format

# Differences in Methodology

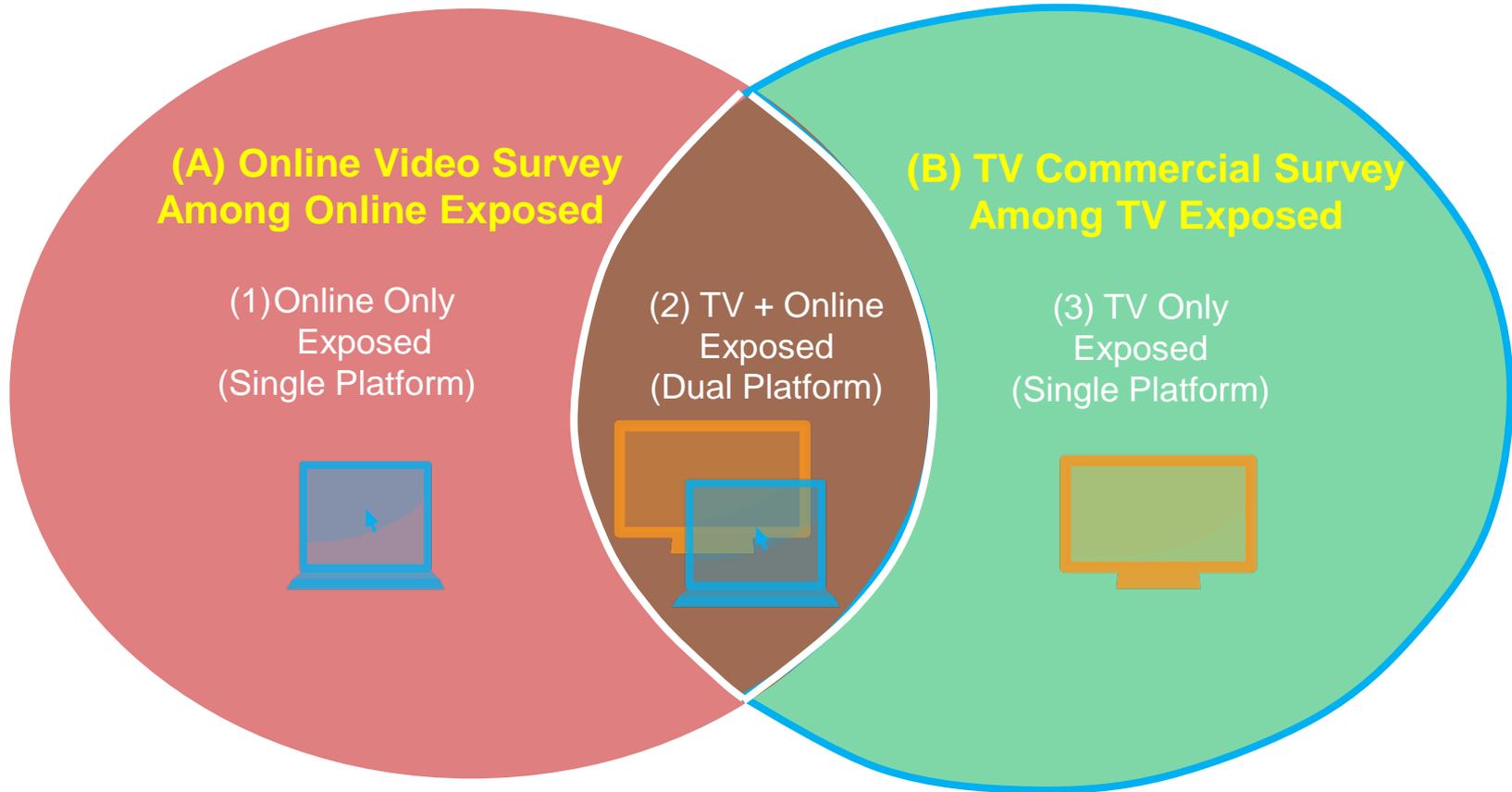
## Online Standard:

- Full Episode Media players are tagged and continuously measured (syndicated)
- Nielsen sees which online shows a panelist has actually watched, and on Reward TV a list is provided of programs they viewed within the past 7 days
- From this list panelists select a Program Engagement survey to take -- Panelists likely select programs they have greater affinity for.
- Ad surveys, for ads which aired during the selected program, are then served up within the context of the Program Engagement survey questions.
- General Recall Question: In an **advertisement during this show**, what did the makers of a pet food share in text as people and pets were seen frolicking in fields and sitting at home?

## Internet Tracker:

- Specific creatives are tagged
- Nielsen can see if a panelist was recently exposed to an internet ad that had been tagged
- On Reward TV panelists select TV shows which they claim to have watched the day before, and they take Program Engagement surveys on these programs.
- At the end of their TV Program Engagement survey, panelists are served unrelated questions about Internet ads they have seen within the past 7 days.
- General Recall Question: In an **advertisement you may have seen on the Internet**, what did the makers of a pet food share in text as people and pets were seen frolicking in fields and sitting at home?

# Nielsen TV & Online Video panelists come from the same source



**Comparable data collection methodology  
and comparable ad effectiveness metrics  
across both platforms!**



# Questions?

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