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 its 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 its 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

TV Viewers, Adults 18+
(Live+SD US PUT%, Total Day)

Nielsen, PUT, Total Day

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

Monthly Total Streams per Streamer (000)

- Dec-11: 138
- Jan-12: 304
- Feb-12: 154
- Mar-12: 154
- Apr-12: 154
- May-12: 154
- Jun-12: 154
- Jul-12: 154
- Aug-12: 154
- Sep-12: 154
- Oct-12: 154
- Nov-12: 154
- Dec-12: 154

% Change 12/11 - 12/12

- % Change: +12%

Monthly Total Time Spent Streaming per Streamer (hrs)

- Dec-11: (5:04 hrs)
- Jan-12: (5:04 hrs)
- Feb-12: (5:04 hrs)
- Mar-12: (5:04 hrs)
- Apr-12: (5:04 hrs)
- May-12: (5:04 hrs)
- Jun-12: (5:04 hrs)
- Jul-12: (5:04 hrs)
- Aug-12: (5:04 hrs)
- Sep-12: (5:04 hrs)
- Oct-12: (5:04 hrs)
- Nov-12: (5:04 hrs)
- Dec-12: (7:30 hrs)

% Change 12/11 - 12/12

- % Change: +49%

Monthly Total Unique Streamers (000)

- Dec-11: 164,298
- Jan-12: 159,926
- Feb-12: 159,926
- Mar-12: 159,926
- Apr-12: 159,926
- May-12: 159,926
- Jun-12: 159,926
- Jul-12: 159,926
- Aug-12: 159,926
- Sep-12: 159,926
- Oct-12: 159,926
- Nov-12: 159,926
- Dec-12: 159,926

% Change 12/11 - 12/12

- % Change: -3%

*Nielsen VideoCensus Dec. ‘11 – Dec. ‘12*
For Online Video Streamers, TV Viewing is Seasonal, but Steady

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage

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

% Change Jan 2011-Mar 2012
-5%

YoY Change: +3% -2% -1%
Digital Video Viewing is Growing Among TV Viewers

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

% Change
Jan 2011-Mar 2012

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

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage
Lightest TV Viewers are Watching Even More Online Video

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

**Avg. Monthly Time Spent Streaming Video per TV Viewer**

<table>
<thead>
<tr>
<th>Minutes Streamed Per Month</th>
<th>Heaviest TV Viewers (Top 20% of Viewers)</th>
<th>Lightest TV Viewers (Bottom 20% of Viewers)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar-11</td>
<td>299 Min.</td>
<td>143 Min.</td>
</tr>
<tr>
<td>Apr-11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>May-11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun-11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul-11</td>
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<td></td>
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<tr>
<td>Aug-11</td>
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<td>Sep-11</td>
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<tr>
<td>Oct-11</td>
<td></td>
<td></td>
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<tr>
<td>Nov-11</td>
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<td></td>
</tr>
<tr>
<td>Dec-11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan-12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb-12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar-12</td>
<td>425 Min.</td>
<td>186 Min.</td>
</tr>
</tbody>
</table>

Measurement Period: March 2011-March 2012

Segment Average Minutes Per Tuning/Streaming Day Per Person

Nielsen Cross Platform Homes Panel

Note: Home Only Usage

Growth 3/11 -3/12

+42%

+30%
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

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage

% Change
Jan 2011-Mar 2012

34.3
35.6

YoY Change: +11% -3% +5%

↑ +4%
Men Stream More Minutes per Month But Women are Catching Up…

M18+ Avg. Monthly Min. Streamed per Person: 243
F18+ Avg. Monthly Min. Streamed per Person: 202

Avg. Monthly Minutes Streamed per Person

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage
Digital Share-Shift: Incremental Reach with Digital
Share Shift: Reallocation of Budgets 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
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

Incremental Reach for Same Spend

*Digital media includes digital video and display.

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

<table>
<thead>
<tr>
<th>% of TV Budget Shifted to Online, CPG Advertisers</th>
<th>Incremental Reach for Same Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>61.2</td>
</tr>
<tr>
<td>5%</td>
<td>63.2</td>
</tr>
<tr>
<td>10%</td>
<td>64.1</td>
</tr>
<tr>
<td>15%</td>
<td>64.6</td>
</tr>
</tbody>
</table>

*Online includes digital video and display ads.*
Non-CPG Advertisers Can Increase Their Reach 6% By Shifting 15% Of Media Spend to Digital Properties

Non-CPG Advertisers Only

<table>
<thead>
<tr>
<th>% of TV Budget Shifted to Online, Non-CPG Ads</th>
<th>Incremental Reach for Same Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>Online Only Reach</td>
</tr>
<tr>
<td>+4% Reach</td>
<td>TV Only Reach</td>
</tr>
<tr>
<td>52.5</td>
<td>+5.4% Reach</td>
</tr>
<tr>
<td>5.2</td>
<td>TV + Online Duplicated Reach</td>
</tr>
<tr>
<td>8.2</td>
<td></td>
</tr>
<tr>
<td>+10%</td>
<td></td>
</tr>
<tr>
<td>53.9</td>
<td></td>
</tr>
<tr>
<td>7.9</td>
<td></td>
</tr>
<tr>
<td>+15%</td>
<td></td>
</tr>
<tr>
<td>54.7</td>
<td></td>
</tr>
<tr>
<td>10.0</td>
<td></td>
</tr>
</tbody>
</table>

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

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

% of TV Budget Shifted to Online
*Online includes digital video and display ads.
Reallocationing 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

<table>
<thead>
<tr>
<th>Category</th>
<th>0%</th>
<th>5%</th>
<th>10%</th>
<th>15%</th>
<th>% Shifted from TV to Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPG-Only</td>
<td>$48,476</td>
<td>$46,924</td>
<td>$46,277</td>
<td>$45,895</td>
<td></td>
</tr>
<tr>
<td>Non-CPG</td>
<td>$153,034</td>
<td>$141,427</td>
<td>$137,544</td>
<td>$135,686</td>
<td></td>
</tr>
<tr>
<td>Across Categories</td>
<td>$48,476</td>
<td>$46,924</td>
<td>$46,277</td>
<td>$45,895</td>
<td></td>
</tr>
</tbody>
</table>

Cost Per Thousand (CPM)
- 0%
- 5%
- 10%
- 15%
- % Shifted from TV to Digital

<table>
<thead>
<tr>
<th>Category</th>
<th>0%</th>
<th>5%</th>
<th>10%</th>
<th>15%</th>
<th>% Shifted from TV to Digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPG-Only</td>
<td>$11.17</td>
<td>$10.82</td>
<td>$10.50</td>
<td>$10.19</td>
<td></td>
</tr>
<tr>
<td>Non-CPG</td>
<td>$41.10</td>
<td>$38.03</td>
<td>$35.71</td>
<td>$21.93</td>
<td></td>
</tr>
<tr>
<td>Across Categories</td>
<td>$11.17</td>
<td>$10.82</td>
<td>$10.50</td>
<td>$10.19</td>
<td></td>
</tr>
</tbody>
</table>

Note: Share shift slides include video + display.

Measuremen Period: January 2011-March 2012
Total of 18 studies were aggregated to create these norms.
Note: Simulations done in IMS Campaign RF.
Data Source: TV/Internet Fusion.
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?

### % of TV Budget Shifted to Online, Across Verticals

<table>
<thead>
<tr>
<th>Reach %</th>
<th>Online Only Reach</th>
<th>TV + Online Duplicated Reach</th>
<th>TV Only Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>57.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5%</td>
<td></td>
<td>60.1</td>
<td>47.6</td>
</tr>
<tr>
<td>10%</td>
<td></td>
<td>61.2</td>
<td>42.2</td>
</tr>
<tr>
<td>15%</td>
<td></td>
<td>61.8</td>
<td>38.3</td>
</tr>
</tbody>
</table>

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

Incremental Reach for Same Spend

Duplicated Reach

- Online Only Reach
- TV + Online Duplicated Reach
- TV Only Reach

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 v TV data.

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General Recall of Ads on TV is Improved Through Duplication Online

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

Effectiveness of Duplicated Reach

53% 54% 55%

TV + Online General Recall

TV Only General Recall

15% 17% 20%

% difference from TV only

46% 46% 46%

TV + Video Ad in Full Episode Online

TV + Video Ad in Short Form Video Online

TV + Non-Video Ad Online (Banner Ad)

General Recall, Across Verticals

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Brand Recall of Ads on TV is Improved Through Duplication Online

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

Effectiveness of Duplicated Reach

![Chart showing the effectiveness of duplicated reach](chart)

- TV + Video Ad in Full Episode Online: 36% vs. 27%, increase of 33%
- TV + Video Ad in Short Form Video Online: 37% vs. 28%, increase of 32%
- TV + Non-Video Ad Online: 35% vs. 28%, increase of 25%

General Recall, Across Verticals

Standard TV includes TV ads on both cable and broadcast networks.
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700 Brands were included in FEP v TV data and 15 brands for SF vs. TV data.
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

### All Brands

<table>
<thead>
<tr>
<th>Category</th>
<th>TV + Prior Online Exposure</th>
<th>TV Only (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>53%</td>
<td>46%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td>Likeability</td>
<td>21%</td>
<td>15%</td>
</tr>
</tbody>
</table>

- 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.

*Online includes digital video only
Prior Exposure to Full Episode Online Video Makes TV More Effective Across Demos

**TV + Prior Online Video Ad Exposure in Full Episode**

- **Men 18-49**
  - General Recall: 49%
  - Brand Recall: 32%
  - Message Recall: 26%
  - Likeability: 19%
  - TV Commercials Only
    - General Recall: 50%
    - Brand Recall: 32%
    - Message Recall: 25%
    - Likeability: 18%

- **Women 18-49**
  - General Recall: 43%
  - Brand Recall: 25%
  - Message Recall: 18%
  - Likeability: 16%

- **Men 18-34**
  - General Recall: 43%
  - Brand Recall: 24%
  - Message Recall: 18%
  - Likeability: 13%

- **Women 18-34**
  - General Recall: 47%
  - Brand Recall: 26%
  - Message Recall: 19%
  - Likeability: 14%

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+

- 53% Average General Recall of Online SF Video Ads
- 46% Average General Recall of TV Ads

57% 56% 55% 55% 54% 54% 53% 51% 50%

Finance Tech Telecom Retail Household Products Hospitality Restaurants Pharma Food & Beverage Auto Health & Beauty

Video Ad in Full Episode Online + TV Commercial
TV Commercial Only (Broadcast + Cable)

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

<table>
<thead>
<tr>
<th>Metric</th>
<th>TV + Prior Online Exposure</th>
<th>TV Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>37%</td>
<td>28%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Likeability</td>
<td>21%</td>
<td>15%</td>
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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.
Prior Exposure to Short Form Online Video Ads Makes TV More Effective Across Demos

TV + Prior Online Video Ad Exposure in Short Form Video

General Recall Brand Recall Message Recall Likeability

Men 18-49

48% 41% 32% 23% 25% 17% 18% 12%

Women 18-49

51% 43% 32% 25% 25% 18% 16% 13%

Men 18-34

41% 36% 24% 18% 18% 12% 13% 10%

Women 18-34

47% 41% 28% 23% 21% 16% 14% 2%

TV Commercials Only (Total)

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 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

**General Recall Across Ad Verticals, Adults 18+**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td>59%</td>
<td>50%</td>
</tr>
<tr>
<td>Tech</td>
<td>58%</td>
<td>46%</td>
</tr>
<tr>
<td>Telecom</td>
<td>57%</td>
<td>50%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>55%</td>
<td>47%</td>
</tr>
<tr>
<td>Household Products</td>
<td>55%</td>
<td>47%</td>
</tr>
<tr>
<td>Retail</td>
<td>54%</td>
<td>47%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>52%</td>
<td>47%</td>
</tr>
<tr>
<td>Pharma</td>
<td>52%</td>
<td>46%</td>
</tr>
<tr>
<td>Auto</td>
<td>50%</td>
<td>45%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>43%</td>
<td>44%</td>
</tr>
</tbody>
</table>

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

Across Verticals and Brands

- General Recall
  - TV + Prior Online Exposure: 55%
  - TV Only: 46%
  - Lift: 20%

- Brand Recall
  - TV + Prior Online Exposure: 35%
  - TV Only: 28%
  - Lift: 25%

- Message Recall
  - TV + Prior Online Exposure: 28%
  - TV Only: 20%
  - Lift: 40%

- Likeability
  - TV + Prior Online Exposure: 19%
  - TV Only: 15%
  - Lift: 27%

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

**Men 18-49**

- **General Recall**: 50%
- **Brand Recall**: 41%
- **Message Recall**: 32%
- **Likeability**: 23%

**Men 18-34**

- **General Recall**: 43%
- **Brand Recall**: 36%
- **Message Recall**: 24%
- **Likeability**: 18%

**Women 18-49**

- **General Recall**: 50%
- **Brand Recall**: 44%
- **Message Recall**: 30%
- **Likeability**: 25%

**Women 18-34**

- **General Recall**: 47%
- **Brand Recall**: 42%
- **Message Recall**: 26%
- **Likeability**: 23%

---

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.
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

General Recall Across Ad Verticals, Adults 18+

<table>
<thead>
<tr>
<th>Ad Vertical</th>
<th>Non-Video Online Ad + TV Ad</th>
<th>TV Commercial Only (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality</td>
<td>60%</td>
<td>46%</td>
</tr>
<tr>
<td>Tech</td>
<td>59%</td>
<td>46%</td>
</tr>
<tr>
<td>Telecom</td>
<td>58%</td>
<td>50%</td>
</tr>
<tr>
<td>Retail</td>
<td>56%</td>
<td>47%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td>Finance</td>
<td>54%</td>
<td>52%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>Auto</td>
<td>49%</td>
<td>43%</td>
</tr>
<tr>
<td>Pharma</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Household Products</td>
<td>46%</td>
<td>49%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>42%</td>
<td>42%</td>
</tr>
</tbody>
</table>

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+
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.
Video Brand Effect
Digital is More Effective
Online Video Ads Outperform TV Ads on All Measured Effectiveness Metrics

- **General Recall**: 64% for Video Ads in TV Shows Online, 49% for Video Ads in Short Form Video Online, 46% for TV Commercials.
- **Brand Recall**: 50% for Video Ads in TV Shows Online, 32% for Video Ads in Short Form Video Online, 27% for TV Commercials.
- **Message Recall**: 40% for Video Ads in TV Shows Online, 24% for Video Ads in Short Form Video Online, 20% for TV Commercials.
- **Likeability**: 28% for Video Ads in TV Shows Online, 17% for Video Ads in Short Form Video Online, 15% for TV Commercials.

*Standard TV Ads include TV ads on both broadcast and cable, 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.
Like Ads in Short Form (up to 24 Min.)
Online Video Outperform Their TV Counterparts

General Recall
- Short Form Video: 49%
- Standard TV (Total): 47%
  Increase: 4%

Brand Recall
- Short Form Video: 32%
- Standard TV (Total): 28%
  Increase: 14%

Message Recall
- Short Form Video: 24%
- Standard TV (Total): 21%
  Increase: 14%

Likeability
- Short Form Video: 17%
- Standard TV (Total): 15%
  Increase: 13%

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

….in These **Ad Verticals:**

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Video Ads in Online Short Form Video</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td>Household Products</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Telecom</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Pharma</td>
<td>50%</td>
<td></td>
</tr>
</tbody>
</table>

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

….and in This **Demo:**

**Women 18-34**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Video Ads in Online Short Form Video</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>45%</td>
<td>42%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>Likeability</td>
<td>14%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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

**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

**Men 18-49**

<table>
<thead>
<tr>
<th>Metric</th>
<th>SF Ads</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Likeability</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Women 18-49**

<table>
<thead>
<tr>
<th>Metric</th>
<th>SF Ads</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>46%</td>
<td>45%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Likeability</td>
<td>14%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Men 18-34**

<table>
<thead>
<tr>
<th>Metric</th>
<th>SF Ads</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Likeability</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Women 18-34**

<table>
<thead>
<tr>
<th>Metric</th>
<th>SF Ads</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Brand Recall</td>
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<td>27%</td>
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<tr>
<td>Message Recall</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Likeability</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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

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 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

General Recall Across Ad Verticals, Adults 18+

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech</td>
<td>52%</td>
<td>47%</td>
</tr>
<tr>
<td>Household Products</td>
<td>55%</td>
<td>51%</td>
</tr>
<tr>
<td>Telecom</td>
<td>51%</td>
<td>47%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>53%</td>
<td>50%</td>
</tr>
<tr>
<td>Finance</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Pharma</td>
<td>51%</td>
<td>50%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>Retail</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Auto</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>51%</td>
<td>43%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>39%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Short Form Video vs. TV across Ad Verticals are available in slides in the appendix.
Video Ads in Full Episode Players Are More Effective Than TV Commercials

- General Recall: 64% (Full Episode Player) vs. 46% (Standard TV)
- Brand Recall: 50% (Full Episode Player) vs. 27% (Standard TV)
- Message Recall: 40% (Full Episode Player) vs. 20% (Standard TV)
- Likeability: 28% (Full Episode Player) vs. 15% (Standard TV)

Green arrows indicate a positive difference at >90% confidence.

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+

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

Men 18-49

- General Recall: 62%
- Brand Recall: 41%
- Message Recall: 48%
- Likeability: 38%

Women 18-49

- General Recall: 62%
- Brand Recall: 43%
- Message Recall: 47%
- Likeability: 38%

Men 18-34

- General Recall: 57%
- Brand Recall: 36%
- Message Recall: 41%
- Likeability: 32%

Women 18-34

- General Recall: 58%
- Brand Recall: 41%
- Message Recall: 41%
- Likeability: 32%

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

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

....in These **Genres:**

- SciFi: 69%
- Talk: 68%
- Drama: 65%
- Animation: 64%

....and in These **Ad Verticals:**

- Finance: 71%
- Retail: 67%
- Restaurants: 65%
- Hospitality: 65%
- Pharma: 63%

**Top Ad Verticals for Ad Effectiveness**

- (General Recall), Adults 18+

**Top Content Genres for Ad Effectiveness**

- (General Recall), Adults 18+

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.

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

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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

<table>
<thead>
<tr>
<th>Online Video Ads in Full Episode Players</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall Across Genres, Adults 18+</td>
<td></td>
</tr>
</tbody>
</table>

- Document Tribute: 71% vs. 64%
- SciFi: 69% vs. 51%
- Talk: 68% vs. 52%
- Drama/Adventure: 65% vs. 44%
- Animation: 64% vs. 44%
- Sitcom: 63% vs. 43%
- Game Show: 62% vs. 44%
- Reality: 62% vs. 46%
- Instruction/Advice: 60% vs. 38%
- Variety Gen.: 54% vs. 43%
- News Mag.: 51% vs. 49%

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

<table>
<thead>
<tr>
<th>Ad Vertical</th>
<th>General Recall Across Ad Verticals, Adults 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Video Ads in Full Episodes Online TV Commercials (Broadcast + Cable)</td>
</tr>
<tr>
<td>Finance</td>
<td>71%</td>
</tr>
<tr>
<td>Retail</td>
<td>67%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>65%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>65%</td>
</tr>
<tr>
<td>Pharma</td>
<td>63%</td>
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<tr>
<td>Telecom</td>
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<tr>
<td>Household Products</td>
<td>62%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>61%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>61%</td>
</tr>
<tr>
<td>Tech</td>
<td>60%</td>
</tr>
<tr>
<td>Auto</td>
<td>60%</td>
</tr>
</tbody>
</table>

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

### Brand Recall Across Ad Verticals, Adults 18+

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Video Ads in Full Episodes Online</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality</td>
<td>55%</td>
<td>50%</td>
</tr>
<tr>
<td>Finance</td>
<td>53%</td>
<td>30%</td>
</tr>
<tr>
<td>Retail</td>
<td>53%</td>
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</tr>
<tr>
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<tr>
<td>Food &amp; Beverage</td>
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<td>Pharma</td>
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<td>Health &amp; Beauty</td>
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<td>24%</td>
</tr>
<tr>
<td>Auto</td>
<td>42%</td>
<td>23%</td>
</tr>
</tbody>
</table>

**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

Message Recall Across Ad Verticals, Adults 18+

<table>
<thead>
<tr>
<th>Ad Vertical</th>
<th>Video Ads in Full Episodes Online</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>45%</td>
<td>24%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>44%</td>
<td>19%</td>
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<tr>
<td>Retail</td>
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<tr>
<td>Finance</td>
<td>43%</td>
<td>21%</td>
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<tr>
<td>Food &amp; Beverage</td>
<td>40%</td>
<td>23%</td>
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<tr>
<td>Household Products</td>
<td>37%</td>
<td>22%</td>
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<tr>
<td>Pharma</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>Telecom</td>
<td>36%</td>
<td>21%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>Auto</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>Tech</td>
<td>32%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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+

- Video Ad in Full Episode Online

<table>
<thead>
<tr>
<th>Metric</th>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPG Full Ep Ads</td>
<td>64%</td>
<td>44%</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td>CPG TV Ads</td>
<td>46%</td>
<td>26%</td>
<td>19%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Non-CPG Adults 18+

- Standard TV Commercial (Total)

<table>
<thead>
<tr>
<th>Metric</th>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-CPG Full Ep Ads</td>
<td>65%</td>
<td>47%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Non-CPG TV Ads</td>
<td>50%</td>
<td>28%</td>
<td>21%</td>
<td>15%</td>
</tr>
</tbody>
</table>

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.
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+**

- Video Ad in Short Form Video Online

**Non-CPG Adults 18+**

- 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

Video Ad in Short Form Video Online

<table>
<thead>
<tr>
<th></th>
<th>CPG Men 18-49</th>
<th>CPG Women 18-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Likeability</td>
<td>19%</td>
<td>24%</td>
</tr>
</tbody>
</table>

45% Avg. Recall A18-49 Short Form Ads
39% Avg. Recall A18-49 TV Ads

Standard TV Commercial (Total)

<table>
<thead>
<tr>
<th></th>
<th>CPG Men 18-49</th>
<th>CPG Women 18-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>46%</td>
<td>40%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Likeability</td>
<td>16%</td>
<td>22%</td>
</tr>
</tbody>
</table>

42% Avg. Recall A18-34 Short Form Ads
37% 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.
Across Demos, Non-CPG Video Ads are On Par with TV in Short Form Videos

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Video Ad in Short Form Video Online</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Recall</td>
<td>Brand Recall</td>
</tr>
<tr>
<td><strong>Non-CPG Men 18-49</strong></td>
<td>42%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Non-CPG Women 18-49</strong></td>
<td>45%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Non-CPG Men 18-34</strong></td>
<td>38%</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Non-CPG Women 18-34</strong></td>
<td>38%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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:**

- Animation: 72%
- SciFi: 68%
- Documentary/First: 65%
- Reality/Non-Competition: 63%
- Drama/Adv.: 61%

**Avg. Gen. Recall of Full Ep. Video Ads:** 64%

**Avg. Gen. Recall of TV Ads:** 46%

…For **Non-CPG:**

- Documentary/First: 73%
- SciFi: 70%
- Talk: 70%
- Drama/Adv.: 66%
- Animation: 64%

**Top Content Genres for CPG Ad Effectiveness** (General Recall), Adults 18+
- Animation
- SciFi
- Documentary/First (Non-Competition)
- Reality/Non-Competition
- Drama/Adv.

**Top Content Genres for Non-CPG Ad Effectiveness** (General Recall), Adults 18+
- Documentary/First
- SciFi
- Talk
- Drama/Adv.
- Animation

*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

- **Video Ad in Full Episodes Online**
  - **CPG Men 18-49**
    - General Recall: 59%
    - Brand Recall: 38%
    - Message Recall: 45%
    - Likeability: 36%
  - **CPG Women 18-49**
    - General Recall: 61%
    - Brand Recall: 43%
    - Message Recall: 46%
    - Likeability: 37%
  - **CPG Men 18-34**
    - General Recall: 52%
    - Brand Recall: 35%
    - Message Recall: 36%
    - Likeability: 28%
  - **CPG Women 18-34**
    - General Recall: 58%
    - Brand Recall: 41%
    - Message Recall: 44%
    - Likeability: 35%

- **Standard TV Commercial (Total)**
  - **CPG Men 18-49**
    - General Recall: 60%
    - Brand Recall: 45%
    - Message Recall: 36%
    - Likeability: 24%
  - **CPG Women 18-49**
    - General Recall: 61%
    - Brand Recall: 43%
    - Message Recall: 46%
    - Likeability: 37%
  - **CPG Men 18-49**
    - General Recall: 60%
    - Brand Recall: 36%
    - Message Recall: 28%
    - Likeability: 17%
  - **CPG Women 18-49**
    - General Recall: 60%
    - Brand Recall: 44%
    - Message Recall: 35%
    - Likeability: 22%

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

- **Non-CPG Men 18-49**
  - Video Ad in Full Episode Online: 63%
  - Standard TV Commercial (Total): 63%
  - General Recall: 58%
  - Brand Recall: 42%
  - Message Recall: 48%
  - Likeability: 38%

- **Non-CPG Women 18-49**
  - Video Ad in Full Episode Online: 63%
  - Standard TV Commercial (Total): 63%
  - General Recall: 58%
  - Brand Recall: 44%
  - Message Recall: 47%
  - Likeability: 38%

- **Non-CPG Men 18-34**
  - Video Ad in Full Episode Online: 58%
  - Standard TV Commercial (Total): 58%
  - General Recall: 37%
  - Brand Recall: 42%
  - Message Recall: 32%
  - Likeability: 20%

- **Non-CPG Women 18-34**
  - Video Ad in Full Episode Online: 39%
  - Standard TV Commercial (Total): 39%
  - General Recall: 22%
  - Brand Recall: 22%
  - Message Recall: 31%
  - Likeability: 22%

**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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Animation</td>
<td>64%</td>
<td>46%</td>
</tr>
<tr>
<td>SciFi</td>
<td>68%</td>
<td>48%</td>
</tr>
<tr>
<td>Documentaries: Tribute</td>
<td>65%</td>
<td>43%</td>
</tr>
<tr>
<td>Reality: (Non-Competition)</td>
<td>63%</td>
<td>41%</td>
</tr>
<tr>
<td>Reality: Drama/Adv.</td>
<td>61%</td>
<td>43%</td>
</tr>
<tr>
<td>SitCom</td>
<td>61%</td>
<td>48%</td>
</tr>
<tr>
<td>Talk</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>Game Show</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Reality: (Competition)</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Variety Gen.</td>
<td>58%</td>
<td>46%</td>
</tr>
<tr>
<td>Instruction</td>
<td>58%</td>
<td>42%</td>
</tr>
</tbody>
</table>

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, 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

<table>
<thead>
<tr>
<th>Genre</th>
<th>Online Video Ads in Full Episode Players</th>
<th>Total TV Ads (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentaries</td>
<td>73%</td>
<td>64%</td>
</tr>
<tr>
<td>SciFi</td>
<td>70%</td>
<td>53%</td>
</tr>
<tr>
<td>Talk</td>
<td>70%</td>
<td>45%</td>
</tr>
<tr>
<td>Drama/Adv</td>
<td>66%</td>
<td>52%</td>
</tr>
<tr>
<td>Animation</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>Instruction</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>Sitcom</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>Reality (Competition)</td>
<td>63%</td>
<td>49%</td>
</tr>
<tr>
<td>Reality (Non-Competition)</td>
<td>63%</td>
<td>45%</td>
</tr>
<tr>
<td>Game Show</td>
<td>62%</td>
<td>45%</td>
</tr>
<tr>
<td>News Mag</td>
<td>59%</td>
<td>50%</td>
</tr>
<tr>
<td>Variety-Gen.</td>
<td>54%</td>
<td>44%</td>
</tr>
</tbody>
</table>

**General Recall Across Genres, Adults 18+**

- **Online Video Ads in Full Episode Players**
  - Documentaries: 73%
  - SciFi: 70%
  - Talk: 70%
  - Drama/Adv: 66%
  - Animation: 64%
  - Instruction: 64%
  - Sitcom: 64%

- **Total TV Ads (Broadcast + Cable)**
  - Reality (Competition): 63%
  - Reality (Non-Competition): 63%
  - Game Show: 62%
  - News Mag: 59%
  - Variety-Gen.: 54%

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

 Nielsen Video Analytics Data
 Measurement Period: January 2011-March 2012
Those Viewing Long Form Content Watch Ads Longer Than Those Viewing Short Form Content

- **Average Ad Time Viewed (seconds)**
  - Video Ads in Long Form Video: 13.6 seconds
  - Video Ads in Short Form Video: 21.4 seconds

- **Average % Completion of Ad Viewed**
  - Video Ads in Long Form Video: 79%
  - Video Ads in Short Form Video: 88%

% Increase of Long Form over Short Form:
- 57%
- 11%

Nielsen Video Analytics Data
Measurement Period: January 2011-March 2012
Includes a mix of ad lengths
Includes skippable ads (time viewed before skipping is included)
Mid-Roll Ads* Have Higher Viewing Completion Rates Than Either Pre-roll Or Post-roll Ads

Video Analytics Attentiveness Score is a single number measuring the overall quality of viewers’ experiences with a particular video, ad or ad/content interaction. Variables used to calculate the score include: time spent viewed/length of clip, usage of pause, skip, or rewind features, in or out of focus, increase/decreases in volume, going full screen, repeat viewing.

* Mid roll in short form can refer to ads in between short form video during playlists.
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

Note: Each chart features mutually exclusive categories; on the full slide, there are three non-exclusive categories: Short Form Content, Long Form Content, and Professionally Produced Content, and may feature overlap from other categories. All other categories are mutually exclusive. Full Episodes are considered Long Form Content.

*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 (%)**

- Short Form Video: 95%
- Long Form Video: 5%

**Total Time Spent Streaming Online Video (%)**

- Short Form Video: 83%
- Long Form Video: 17%

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

Total Time Spent Streaming Online Video

Avg. Monthly **Short Form** Time Spent Streaming: **26 Billion Minutes**
Avg. Monthly **Long Form** Time Spent Streaming: **5.3 Billion Minutes**

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

Source: NetView Online Panel
Measurement Period: January 2011 – March 2012. Total Minutes Spent Viewing (Sum Total). 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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
Long and Short Form Streamers Are Similar…

More Streamers are Women

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

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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
Professionally Produced Content Reaches 9 in 10 Online Video Viewers; UGC Reaches 8 in 10

Active Online Reach (%)

Professionally Produced Content
91%

User Generated Content (UGC)
80%

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.

Measurement Period: January 2011 – March 2012. Total Minutes Spent Viewing (Sum Total). 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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
Two-Thirds of Time Spent Streaming is of Professionally Produced Video

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

**Total Online Videos Streamed (%)**
- 42% Professionally Produced Video
- 58% User Generated Content

**Total Time Spent Streaming Online Video (%)**
- 38% Professionally Produced Video
- 62% 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.

**Total Time Spent Streaming**

- **Professionally Produced Content**
  - Avg. Monthly Min. Streaming: 17.1 Billion Minutes
  - YoY Change: +10% +8% -1%

- **User Generated Content**
  - Avg. Monthly Min. Streaming: 27.7 Billion Minutes
  - YoY Change: +21% +12% +8%

Source: NetView Online Panel. Measurement Period: January 2011 – March 2012. Total Minutes Spent Viewing (Sum Total). 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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
Streamers of UGC and Professional Content Are Similar…

More Streamers are Women

Total Unique Streamers

<table>
<thead>
<tr>
<th></th>
<th>P18-24</th>
<th>P25-34</th>
<th>P35-54</th>
<th>P55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>14%</td>
<td>31%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Female</td>
<td>43%</td>
<td>31%</td>
<td>34%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Professional Content

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGC</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>P18-24</td>
<td>13%</td>
<td>47%</td>
</tr>
<tr>
<td>P25-34</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>P35-54</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>P55+</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

But Men Stream More Professional Videos and UGC, especially UGC

Total Professionally Produced Videos Streamed

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGC</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>P18-24</td>
<td>13%</td>
<td>47%</td>
</tr>
<tr>
<td>P25-34</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>P35-54</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>P55+</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Total UGC Videos Streamed

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGC</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>P18-24</td>
<td>13%</td>
<td>47%</td>
</tr>
<tr>
<td>P25-34</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>P35-54</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>P55+</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Time Spent Streaming: F 47% : M 53%

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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
News & Info Has More Than Twice the Reach of Any Other Genre of Online Video Video

Nearly \( \frac{1}{2} \) of all streamers view TV shows and clips online.

### Active Online Streaming Reach (%)

- **Portals, News & Info**: 87%
- **TV Shows & Clips**: 41%
- **Music**: 37%
- **Sports/Sport Clips**: 24%
- **Movie Trailer**: 18%
- **Gaming/Game Trailers**: 13%
- **Movies**: 7%

---

Total Minutes Spent Viewing (Sum Total). 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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
More Time is Spent Streaming Portals, News & Info Video Than Any Other Genre

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

- Portals, News & Info: 299
- TV Shows & Clips: 96
- Movies: 64
- Music: 45
- Sports/Sport Clips: 14
- Gaming/Game Trailers: 10
- Movie Trailer: 6

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

50% more time is spent streaming TV online than Movies

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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
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.)

Professionally Produced Content
Portals, News & Info
TV Shows & Clips
Movies
Music
Sports/Sports Highlights
Movie Trailer
Gaming/Game Trailers

*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

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 (%)

<table>
<thead>
<tr>
<th>Genre</th>
<th>P18-24</th>
<th>P25-34</th>
<th>P35-54</th>
<th>P55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>News, Info &amp; Portals</td>
<td>21%</td>
<td>26%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>TV Shows &amp; Clips</td>
<td>18%</td>
<td>28%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>Music</td>
<td>17%</td>
<td>25%</td>
<td>31%</td>
<td>12%</td>
</tr>
<tr>
<td>Sports/Highlights</td>
<td>11%</td>
<td>25%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>Movie Trailers</td>
<td>13%</td>
<td>27%</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Games/Gaming Trailers</td>
<td>24%</td>
<td>27%</td>
<td>41%</td>
<td>9%</td>
</tr>
<tr>
<td>Movies</td>
<td>22%</td>
<td>26%</td>
<td>40%</td>
<td>12%</td>
</tr>
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<table>
<thead>
<tr>
<th>Male</th>
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<tbody>
<tr>
<td>58%</td>
<td>42%</td>
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<tr>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>47%</td>
<td>53%</td>
</tr>
</tbody>
</table>

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. Short form and Long form are mutually exclusive categories. Full Episodes are considered Long Form Content.
Appendix
Identifying Future Opportunities With Learnings From Past Studies

• 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
Mobile Video Viewing Is Growing Along With Online Video

Mobile Video Viewers (000s)

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Mobile Video Viewers (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2011</td>
<td>28,538</td>
</tr>
<tr>
<td>Q4 2011</td>
<td>33,526</td>
</tr>
<tr>
<td>Q1 2012</td>
<td>35,957</td>
</tr>
</tbody>
</table>

From Nielsen Cross Platform Report, Q1 2012
Mobile video user projection, time spent and composition data are based on survey analysis of past 30 day use during the period. The mobile video audience figures in this report include mobile phone users (aged 13+) who access mobile video through any means (including mobile Web, subscription-based, downloads and applications).
Digital Video Viewing is Growing Among TV Viewers

Avg. Monthly Minutes Streamed per TV Viewer

Among Cross-Platform Homes Panel, A18+

Online Video Streaming Usage by TV Viewers

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage

Copyright © 2012 The Nielsen Company. Confidential and proprietary.
TV Viewing is Flat Among Video Streamers

Avg. Monthly TV Minutes Viewed per Video Streamer

TV Viewing by Online Video Streamers

Measurement Period: January 2011-March 2012
Sum of Segment Average Minutes Per Tuning/Streaming Day Per Person
Nielsen Cross Platform Homes Panel
Note: Home Only Usage
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

Ad Effectiveness Metrics, Adults 18+

- General Recall: 64% for Online Video, 52% for Broadcast, 44% for Cable
- Brand Recall: 50% for Online Video, 33% for Broadcast, 26% for Cable
- Message Recall: 40% for Online Video, 25% for Broadcast, 19% for Cable
- Likeability: 28% for Online Video, 17% for Broadcast, 14% for 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 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 Short Form Online Video Ads Makes TV More Effective Across Demos

TV + Prior Online Video Ad Exposure in Short Form Video

Men 18-49

<table>
<thead>
<tr>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Commercials Only</td>
<td>48%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>TV Commercials Only</td>
<td>47%</td>
<td>32%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Women 18-49

<table>
<thead>
<tr>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Commercials Only</td>
<td>51%</td>
<td>43%</td>
<td>25%</td>
</tr>
<tr>
<td>TV Commercials Only</td>
<td>47%</td>
<td>32%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Adults 18-34

<table>
<thead>
<tr>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg TV+ Short Form Video</td>
<td>49%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Avg TV+ Short Form Video</td>
<td>47%</td>
<td>28%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Adults 35-64

<table>
<thead>
<tr>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg TV+ Short Form Video</td>
<td>49%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Avg TV+ Short Form Video</td>
<td>47%</td>
<td>28%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>TV + Prior Online Video Ad Exposure in Full Episode</th>
<th>TV Commercials Only (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Men 18-49</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Recall</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Likeability</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Women 18-49</strong></td>
<td></td>
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<tr>
<td>General Recall</td>
<td>43%</td>
<td>58%</td>
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<tr>
<td>Brand Recall</td>
<td>48%</td>
<td>48%</td>
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<tr>
<td>Message Recall</td>
<td>42%</td>
<td>42%</td>
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<tr>
<td>Likeability</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Adults 18-34</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Recall</td>
<td>25%</td>
<td>48%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>19%</td>
<td>35%</td>
</tr>
<tr>
<td>Likeability</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Adults 35-64</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Recall</td>
<td>19%</td>
<td>35%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>14%</td>
<td>30%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Likeability</td>
<td>11%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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

- TV + Prior Non-Video Online Ad Exposure
- TV Commercials Only (Total)

### Men 18-49
- General Recall: 41% vs. 32%
- Brand Recall: 23% vs. 25%
- Message Recall: 17% vs. 16%
- Likeability: 12% vs. 12%

### Women 18-49
- General Recall: 44% vs. 30%
- Brand Recall: 25% vs. 22%
- Message Recall: 18% vs. 15%
- Likeability: 13% vs. 13%

### Adults 18-34
- General Recall: 45% vs. 39%
- Brand Recall: 25% vs. 21%
- Message Recall: 19% vs. 14%
- Likeability: 13% vs. 11%

### Adults 35-64
- General Recall: 49% vs. 39%
- Brand Recall: 30% vs. 23%
- Message Recall: 31% vs. 21%
- Likeability: 21% vs. 16%

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

TV + Prior Online Video Ad Exposure in Short Form Video

**Adults 18+**
- General Recall: 55% (TV + Prior Online) vs. 46% (TV Only)
- Brand Recall: 35% (TV + Prior Online) vs. 28% (TV Only)
- Message Recall: 28% (TV + Prior Online) vs. 20% (TV Only)
- Likeability: 19% (TV + Prior Online) vs. 15% (TV Only)

**Adults 18-34**
- General Recall: 44% (TV + Prior Online) vs. 39% (TV Only)
- Brand Recall: 26% (TV + Prior Online) vs. 21% (TV Only)
- Message Recall: 19% (TV + Prior Online) vs. 14% (TV Only)
- Likeability: 14% (TV + Prior Online) vs. 11% (TV Only)

**Adults 18-49**
- General Recall: 49% (TV + Prior Online) vs. 42% (TV Only)
- Brand Recall: 32% (TV + Prior Online) vs. 24% (TV Only)
- Message Recall: 25% (TV + Prior Online) vs. 17% (TV Only)
- Likeability: 17% (TV + Prior Online) vs. 13% (TV Only)

**Adults 35-64**
- General Recall: 48% (TV + Prior Online) vs. 42% (TV Only)
- Brand Recall: 30% (TV + Prior Online) vs. 21% (TV Only)
- Message Recall: 35% (TV + Prior Online) vs. 22% (TV Only)
- Likeability: 26% (TV + Prior Online) vs. 16% (TV Only)

Standard TV includes TV ads on both cable and broadcast networks. Primetime, non-sports digital Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12. A18+. Green arrows indicate a positive difference at >90% confidence Level. 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.
Duplication: Prior Exposure to Short Form Online Video Ads Makes TV More Effective

TV + Prior Online Video Ad Exposure in Short Form Video

- **Men 18+**
  - General Recall: 54%
  - Brand Recall: 46%
  - Message Recall: 38%
  - Likeability: 31%

- **Women 18+**
  - General Recall: 55%
  - Brand Recall: 46%
  - Message Recall: 36%
  - Likeability: 27%

- **Men 18-49**
  - General Recall: 48%
  - Brand Recall: 41%
  - Message Recall: 32%
  - Likeability: 23%

- **Women 18-49**
  - General Recall: 51%
  - Brand Recall: 43%
  - Message Recall: 32%
  - Likeability: 25%

TV Commercials Only (Total)

- **Men 18+**
  - General Recall: 46%
  - Brand Recall: 28%
  - Message Recall: 21%
  - Likeability: 15%

- **Women 18+**
  - General Recall: 36%
  - Brand Recall: 27%
  - Message Recall: 28%
  - Likeability: 20%

- **Men 18-49**
  - General Recall: 41%
  - Brand Recall: 23%
  - Message Recall: 17%
  - Likeability: 12%

- **Women 18-49**
  - General Recall: 32%
  - Brand Recall: 25%
  - Message Recall: 25%
  - Likeability: 18%

General Recall

- **Men 18+**
  - 46%

- **Women 18+**
  - 43%

- **Men 18-49**
  - 41%

- **Women 18-49**
  - 32%

Brand Recall

- **Men 18+**
  - 28%

- **Women 18+**
  - 27%

- **Men 18-49**
  - 23%

- **Women 18-49**
  - 25%

Message Recall

- **Men 18+**
  - 31%

- **Women 18+**
  - 28%

- **Men 18-49**
  - 25%

- **Women 18-49**
  - 25%

Likeability

- **Men 18+**
  - 15%

- **Women 18+**
  - 20%

- **Men 18-49**
  - 12%

- **Women 18-49**
  - 18%

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

TV + Prior Online Video Ad Exposure in Short Form Video

- **Men 18-34**
  - General Recall: 41%
  - Brand Recall: 24%
  - Message Recall: 18%
  - Likeability: 13%

- **Men 35-64**
  - General Recall: 49%
  - Brand Recall: 45%
  - Message Recall: 38%
  - Likeability: 29%

- **Women 18-34**
  - General Recall: 47%
  - Brand Recall: 28%
  - Message Recall: 21%
  - Likeability: 16%

- **Women 35-64**
  - General Recall: 48%
  - Brand Recall: 40%
  - Message Recall: 32%
  - Likeability: 23%

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
Short Form Online Video is More Effective Than TV Across Demos

<table>
<thead>
<tr>
<th></th>
<th>Adults 18+</th>
<th>Adults 18-49</th>
<th>Adults 18-34</th>
<th>Adults 35-64</th>
</tr>
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<tr>
<td><strong>Video Ads in Short Form Video Online</strong></td>
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<td></td>
<td></td>
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<tr>
<td>General Recall</td>
<td>49%</td>
<td>45%</td>
<td>51%</td>
<td>35%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>47%</td>
<td>44%</td>
<td>50%</td>
<td>31%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>32%</td>
<td>28%</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>Likeability</td>
<td>24%</td>
<td>21%</td>
<td>18%</td>
<td>23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adults 18+</th>
<th>Adults 18-49</th>
<th>Adults 18-34</th>
<th>Adults 35-64</th>
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<tbody>
<tr>
<td><strong>Standard TV Commercials (Total)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Recall</td>
<td>47%</td>
<td>50%</td>
<td>50%</td>
<td>35%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>47%</td>
<td>35%</td>
<td>25%</td>
<td>31%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>28%</td>
<td>31%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Likeability</td>
<td>17%</td>
<td>18%</td>
<td>13%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Note: 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.
Short Form Online Video is More Effective Than TV Across Demos

- Video Ads in Short Form Video Online
- Standard TV Commercials (Total)

**Men 18+**
- General Recall: 48% vs. 47%
- Brand Recall: 33% vs. 29%
- Message Recall: 25% vs. 22%
- Likeability: 18% vs. 16%

**Women 18+**
- General Recall: 50% vs. 48%
- Brand Recall: 32% vs. 28%
- Message Recall: 23% vs. 20%
- Likeability: 16% vs. 15%

**Men 18-49**
- General Recall: 43% vs. 42%
- Brand Recall: 27% vs. 24%
- Message Recall: 21% vs. 18%
- Likeability: 15% vs. 13%

**Women 18-49**
- General Recall: 46% vs. 45%
- Brand Recall: 28% vs. 25%
- Message Recall: 21% vs. 18%
- Likeability: 14% vs. 13%
Short Form Online Video is More Effective Than TV Across Demos

Video Ads in Short Form Video Online

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

<table>
<thead>
<tr>
<th></th>
<th>Online Video Ad in Short Form Video</th>
<th>Standard TV Commercial (Total)</th>
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<tr>
<td><strong>Men 18-49</strong></td>
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<td></td>
</tr>
<tr>
<td>General Recall</td>
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<td>42%</td>
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<td>Brand Recall</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Likeability</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Women 18-49</strong></td>
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<td></td>
</tr>
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<td>General Recall</td>
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<td>45%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Likeability</td>
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<tr>
<td><strong>Adults 18-34</strong></td>
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<td>50%</td>
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<td>Brand Recall</td>
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<td>Message Recall</td>
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<tr>
<td>Likeability</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Adults 35-64</strong></td>
<td></td>
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</tr>
</tbody>
</table>

*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.*

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**
  - Men 18-49:
    - General Recall: 62%
    - Brand Recall: 41%
    - Message Recall: 38%
    - Likeability: 26%
  - Women 18-49:
    - General Recall: 62%
    - Brand Recall: 43%
    - Message Recall: 38%
    - Likeability: 23%

- **Standard TV Commercial (Total)**
  - Adults 18-34:
    - General Recall: 57%
    - Brand Recall: 39%
    - Message Recall: 41%
    - Likeability: 21%
  - Adults 35-64:
    - General Recall: 69%
    - Brand Recall: 48%
    - Message Recall: 55%
    - Likeability: 34%

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

- **Adults 18+**
  - General Recall: 64% vs. 50%
  - Brand Recall: 46% vs. 27%
  - Message Recall: 40% vs. 20%
  - Likeability: 28% vs. 15%

- **Adults 18-34**
  - General Recall: 57% vs. 39%
  - Brand Recall: 41% vs. 21%
  - Message Recall: 32% vs. 14%
  - Likeability: 21% vs. 11%

- **Adults 18-49**
  - General Recall: 62% vs. 42%
  - Brand Recall: 47% vs. 24%
  - Message Recall: 38% vs. 17%
  - Likeability: 24% vs. 13%

- **Adults 35-64**
  - General Recall: 69% vs. 48%
  - Brand Recall: 55% vs. 30%
  - Message Recall: 46% vs. 22%
  - Likeability: 34% vs. 16%

Standard TV includes TV ads on both cable and broadcast networks. Prime-time, 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

- **General Recall**: Video Ad in Full Episode Online - 65% vs. Standard TV Commercial (Total) - 62%
- **Brand Recall**: Video Ad in Full Episode Online - 52% vs. Standard TV Commercial (Total) - 48%
- **Message Recall**: Video Ad in Full Episode Online - 42% vs. Standard TV Commercial (Total) - 38%
- **Likeability**: Video Ad in Full Episode Online - 33% vs. Standard TV Commercial (Total) - 26%

**Men 18+**
- **General Recall**: Video Ad in Full Episode Online - 63% vs. Standard TV Commercial (Total) - 62%
- **Brand Recall**: Video Ad in Full Episode Online - 46% vs. Standard TV Commercial (Total) - 43%
- **Message Recall**: Video Ad in Full Episode Online - 39% vs. Standard TV Commercial (Total) - 38%
- **Likeability**: Video Ad in Full Episode Online - 27% vs. Standard TV Commercial (Total) - 25%

**Women 18+**
- **General Recall**: Video Ad in Full Episode Online - 24% vs. Standard TV Commercial (Total) - 23%
- **Brand Recall**: Video Ad in Full Episode Online - 20% vs. Standard TV Commercial (Total) - 18%
- **Message Recall**: Video Ad in Full Episode Online - 14% vs. Standard TV Commercial (Total) - 13%
- **Likeability**: Video Ad in Full Episode Online - 12% vs. Standard TV Commercial (Total) - 13%

**Men 18-49**
- **General Recall**: Video Ad in Full Episode Online - 41% vs. Standard TV Commercial (Total) - 43%
- **Brand Recall**: Video Ad in Full Episode Online - 23% vs. Standard TV Commercial (Total) - 25%
- **Message Recall**: Video Ad in Full Episode Online - 17% vs. Standard TV Commercial (Total) - 18%
- **Likeability**: Video Ad in Full Episode Online - 12% vs. Standard TV Commercial (Total) - 13%

**Women 18-49**
- **General Recall**: Video Ad in Full Episode Online - 48% vs. Standard TV Commercial (Total) - 47%
- **Brand Recall**: Video Ad in Full Episode Online - 25% vs. Standard TV Commercial (Total) - 25%
- **Message Recall**: Video Ad in Full Episode Online - 38% vs. Standard TV Commercial (Total) - 38%
- **Likeability**: Video Ad in Full Episode Online - 18% vs. Standard TV Commercial (Total) - 18%

**Notes**:
- 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

<table>
<thead>
<tr>
<th></th>
<th>Men 18-34</th>
<th>Women 18-34</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Video Ad in Full Episode Online</strong></td>
<td><strong>Standard TV Commercial (Total)</strong></td>
<td></td>
</tr>
<tr>
<td>General Recall</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>48%</td>
<td>53%</td>
</tr>
<tr>
<td>Likeability</td>
<td>41%</td>
<td>48%</td>
</tr>
</tbody>
</table>

**Note:**
- 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 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

### Brand Recall Across Genres, Adults 18+

<table>
<thead>
<tr>
<th>Genre</th>
<th>Online Video Ads in Full Episode Players</th>
<th>Total TV Ads (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentary</td>
<td>58%</td>
<td>50%</td>
</tr>
<tr>
<td>SciFi</td>
<td>57%</td>
<td>33%</td>
</tr>
<tr>
<td>Talk</td>
<td>57%</td>
<td>26%</td>
</tr>
<tr>
<td>Drama/Adventure</td>
<td>50%</td>
<td>33%</td>
</tr>
<tr>
<td>Animation</td>
<td>49%</td>
<td>27%</td>
</tr>
<tr>
<td>Instruction/Advice</td>
<td>48%</td>
<td>19%</td>
</tr>
<tr>
<td>Reality</td>
<td>48%</td>
<td>28%</td>
</tr>
<tr>
<td>Sitcom</td>
<td>48%</td>
<td>24%</td>
</tr>
<tr>
<td>Game Show</td>
<td>46%</td>
<td>24%</td>
</tr>
<tr>
<td>Variety Gen.</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>News Mag.</td>
<td>33%</td>
<td>25%</td>
</tr>
</tbody>
</table>

50% Avg. Brand Recall for Video Ads

27% Avg. Brand Recall for TV Ads

Brand recall only asked of those who correctly recall general recall. Message recall, only shown to those who correctly recall brand.
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

Message Recall Across Genres, Adults 18+

<table>
<thead>
<tr>
<th>Genre</th>
<th>Online Video Ads in Full Episode Players</th>
<th>Total TV Ads (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documentaries</td>
<td>52%</td>
<td>40%</td>
</tr>
<tr>
<td>Talk</td>
<td>49%</td>
<td>25%</td>
</tr>
<tr>
<td>SciFi</td>
<td>46%</td>
<td>25%</td>
</tr>
<tr>
<td>Instruction/Advice</td>
<td>42%</td>
<td>13%</td>
</tr>
<tr>
<td>Drama/Adventure</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Animation</td>
<td>39%</td>
<td>19%</td>
</tr>
<tr>
<td>Sitcom</td>
<td>38%</td>
<td>17%</td>
</tr>
<tr>
<td>Game Show</td>
<td>38%</td>
<td>18%</td>
</tr>
<tr>
<td>Reality</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>Variety Gen.</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>News Mag.</td>
<td>23%</td>
<td>22%</td>
</tr>
</tbody>
</table>

TV ads include primetime, non-sports. 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, 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

![Chart showing comparison between online and TV ad likeability across genres](chart.png)

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
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

### Documentary/Salute/Tribute
- 71% (FEP), 69% (TV)
- 58% (FEP), 57% (TV)
- 52% (FEP), 46% (TV)
- 51% (FEP), 33% (TV)
- 35% (FEP), 25% (TV)
- 17% (FEP), 14% (TV)
- 14% (FEP), 14% (TV)

### Science Fiction
- 69% (FEP), 66% (TV)
- 68% (FEP), 64% (TV)
- 57% (FEP), 50% (TV)
- 49% (FEP), 44% (TV)
- 46% (FEP), 33% (TV)
- 33% (FEP), 27% (TV)
- 26% (FEP), 19% (TV)

### Talk Format
- 68% (FEP), 66% (TV)
- 57% (FEP), 50% (TV)
- 49% (FEP), 44% (TV)
- 49% (FEP), 44% (TV)
- 40% (FEP), 33% (TV)
- 19% (FEP), 13% (TV)
- 12% (FEP), 12% (TV)

### Drama/Adventure
- 65% (FEP), 52% (TV)
- 64% (FEP), 44% (TV)
- 50% (FEP), 33% (TV)
- 49% (FEP), 27% (TV)
- 41% (FEP), 25% (TV)
- 28% (FEP), 17% (TV)
- 13% (FEP), 13% (TV)

### Animation
- 71% (FEP), 69% (TV)
- 68% (FEP), 66% (TV)
- 58% (FEP), 50% (TV)
- 49% (FEP), 44% (TV)
- 52% (FEP), 39% (TV)
- 41% (FEP), 26% (TV)
- 12% (FEP), 12% (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

<table>
<thead>
<tr>
<th>Brand Recall Across Ad Verticals, Adults 18+</th>
<th>Video Ads in Online Short Form Video</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech</td>
<td>32%</td>
<td>38%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Pharma</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Telecom</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Household Products</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>Finance</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Retail</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Auto</td>
<td>27%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Brand recall only asked of those who correctly recall general recall. Message recall, only shown to those who correctly recall brand.

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
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+

<table>
<thead>
<tr>
<th>Category</th>
<th>Video Ads in Short Form Online Videos</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Beauty</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Pharma</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Telecom</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Household Products</td>
<td>29%</td>
<td>23%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Tech</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Finance</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Auto</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Avg. Message Recall SF Video Ads: 24%
Avg. Message Recall of TV Ads: 21%

Brand recall only asked of those who correctly recall general recall. Message recall, only shown to those who correctly recall brand.
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

Likeability Across Ad Verticals, Adults 18+

<table>
<thead>
<tr>
<th>Category</th>
<th>Online Video Ads</th>
<th>TV Commercials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Beauty</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>Household Products</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Tech</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Telecom</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Finance</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Pharma</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Auto</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Avg. Likeability of Video Ads: 17%
Avg. Likeability of TV Ads: 15%
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

Panel

- Fully profiled:
  - Home
  - Work
  - Combo (Home+ Work)
  - 2+ people in the HH
  - Main demographics
  - Geo demographics
  - Social Grade

Meter

- Record at desktop level
- Individual measure of every:
  - URL visited
  - Web session
  - In-focus events (active browser)
  - Duration (start & stop events)
  - Online & offline (PC) activities
  - Applications used
  - Video (with tag)

Recruitment

- Representative sample:
  - Recruitment via telephone & online
  - Enumerated to local establishment survey (NRS)
Nielsen Cross Platform Homes Panel – Single 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

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

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
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

<table>
<thead>
<tr>
<th>Viewers exposed in natural media environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live TV &amp; Live +1 DVR</td>
</tr>
<tr>
<td>Computer, Tablet or Mobile*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nielsen captures exposures in each medium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-reported TV viewing</td>
</tr>
<tr>
<td>Tagged banner/video ads</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Panelists 13+ are surveyed on</th>
</tr>
</thead>
<tbody>
<tr>
<td>RewardTV</td>
</tr>
<tr>
<td>Program Engagement + Ad Recall</td>
</tr>
<tr>
<td>Ad Recall</td>
</tr>
</tbody>
</table>

**Insights and Recommendations Provided**

- Platform comparison
- Cross-media impact

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 impact is measured up to 24 hours after exposure for comparison to TV and up to a maximum 7 days after exposure for online comparisons.*
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

“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.
### 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

**RECALL Metrics**
quantify the net impact of advertising

1. **Is the ad breaking through?**
   - **General Recall**
     - Among total audience, the % who recalled the ad

2. **Is the brand communicated?**
   - **Brand Recall**
     - Among total audience, the % who recalled the ad and the brand

3. **Is the message communicated?**
   - **Message Recall**
     - Among total audience, the % who recalled the ad, brand and the message

4. **Is the ad well liked?**
   - **Likeability**
     - Among total audience, the % who recalled the ad, brand and liked the ad

5. **Did the ad impact product intent?**
   - **Optional Purchase/Usage Intent**

**LINKAGE Metrics**
isolate and diagnose the creative elements

- **Brand Linkage**
  - Among those who recall the ad, the % who recalled the brand

- **Message Linkage**
  - Among those who recall the brand, the % who recalled the message

- **Likeability Linkage**
  - Among those who recall the brand, the % who liked the ad

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

(A) Online Video Survey Among Online Exposed

(1) Online Only Exposed
   (Single Platform)

(2) TV + Online Exposed
   (Dual Platform)

(B) TV Commercial Survey Among TV Exposed

(3) TV Only Exposed
   (Single Platform)

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

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