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 Effectivity

• 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.

Highest impact content for ads in full episode players are Documentary/tribute, SciFi, Talk, Drama/Adventure, Animation, all at 64% or more general ad recall.

Highest impact for ads in full episodes online are in the following Ad Verticals: Finance, Retail, Restaurants, Hospitality and Pharma.
Executive Summary

Ad Receptivity

• On average, people streaming video watch ads for 20 seconds and average a completion rate of 87%

• Regardless of content, short or long form, mid roll ads enjoy the highest completion rates, 99% in short form and 89% in long form.

• Pre roll placements in short form ads average 79% completion rates and in long form 81%.

• Post roll placements in short form content average 71% completion rates and 79% in long form.
Data Sources

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

See appendix for overviews of each dataset methodology
Background:
Online Video Definitions

• **Long form online video** – Any online video that, in it’s total, is *longer* than 24 minutes in length, or a site where the majority of the content is *longer* than 24 minutes in length. (Includes all TV network sites and full episodes).

• **Short form online video** – Any online video that, in it’s total, is *shorter* than 24 minutes in length, or a site where the majority of the content is *shorter* than 24 minutes in length.

• **Professionally produced content** – Any online video content that was produced in a professional or studio environment.

• **User generated content (UGC)** – Any online video content that was produced by an individual user in a non-professional context.

• **FEPs** – Full episode player (FEP) features an episode of a show that previously aired on television (example: Hulu)

• **Short Form Brand Effect Video** – All other online video formats except for the full episode player (example: Movie trailer)

• **Survey Period** – Jan 2011 – March 2012. Q1 2012 used for year over year comparisons

**Note:** Detailed Methodology slides are located in Appendix
Online Video Usage Landscape: Digital Video is Growing
Current State of TV:
Viewing is Flat

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

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

Nielsen, PUT, Total Day

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

**Monthly Total Time Spent Streaming per Streamer**

- December 2011: 5:04 hrs
- December 2012: 7:30 hrs
- % Change: +49%

**Monthly Total Streams per Streamer (000)**

- December 2011: 138
- December 2012: 154
- % Change: +12%

**Monthly Total Unique Streamers (000)**

- December 2011: 164,298
- December 2012: 159,926
- % Change: -3%

VideoCensus, Total Audience

Nielsen VideoCensus Dec. '11 – Dec. '12

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

% Change
Jan 2011- Mar 2012

-5%

Avg. Minutes of TV Viewed Per Tune-In Day per Month

TV Viewing by Online Video Streamers
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
Digital Video Viewing is Growing Among TV Viewers

% Change
Jan 2011-Mar 2012

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

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

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**

- **Lightest TV Viewers**
  - Growth: +42% (3/11 - 3/12)

- **Heaviest TV Viewers**
  - Growth: +30% (3/11 - 3/12)

Measurement Period: March 2011-March 2012

Segment Average Minutes Per Tuning/Streaming Day Per Person

Nielsen Cross Platform Homes Panel

Note: Home Only Usage
Digital Video Viewing is Also Growing Among TV Viewers 18-34

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

YoY Change: +11%  -3%  +5%  +4%

**Measurement Period:** January 2011-March 2012

**TV Viewing by Online Video Streamers**
Among Cross-Platform Homes Panel, A18-34

**Nielsen Cross Platform Homes Panel**
Note: Home Only Usage
Men Stream More Minutes per Month But Women are Catching Up…

% Change Jan 2011- Mar 2012

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

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

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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

Reach %

<table>
<thead>
<tr>
<th>% of TV Budget Shifted to Digital*</th>
<th>TV Only Reach</th>
<th>TV + Online</th>
<th>Online Only Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>57.6</td>
<td>57.6</td>
<td>-</td>
</tr>
<tr>
<td>5%</td>
<td>60.1</td>
<td>47.6</td>
<td>8.9</td>
</tr>
<tr>
<td>10%</td>
<td>61.2</td>
<td>42.2</td>
<td>13.2</td>
</tr>
<tr>
<td>15%</td>
<td>61.8</td>
<td>38.3</td>
<td>16</td>
</tr>
</tbody>
</table>

*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

Incremental Reach for Same Spend

<table>
<thead>
<tr>
<th>% of TV Budget Shifted to Online, CPG Advertisers</th>
<th>0%</th>
<th>5%</th>
<th>10%</th>
<th>15%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Only Reach</td>
<td>61.2</td>
<td>9.2</td>
<td>13.9</td>
<td>17</td>
</tr>
<tr>
<td>TV + Online Duplicated Reach</td>
<td>51</td>
<td>45.2</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>TV Only Reach</td>
<td>61.2</td>
<td>63.2</td>
<td>64.1</td>
<td>64.6</td>
</tr>
</tbody>
</table>

CPG Advertiser studies only
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

*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

Incremental Reach for Same Spend

Reach %

<table>
<thead>
<tr>
<th>% of TV Budget Shifted to Online, Non-CPG Ads</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>48.5</td>
<td>5.2</td>
<td>43.3</td>
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<tr>
<td>5%</td>
<td>52.5</td>
<td>8.2</td>
<td>44.3</td>
</tr>
<tr>
<td>10%</td>
<td>53.9</td>
<td>11.4</td>
<td>42.5</td>
</tr>
<tr>
<td>15%</td>
<td>54.7</td>
<td>13.3</td>
<td>41.4</td>
</tr>
</tbody>
</table>

Non-CPG Advertiser studies only
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

*Online includes digital video and display ads.
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.
Reallocating Dollars To Online Builds
Higher Quality, More Effective Reach at a Lower Cost

Cost Per Reach Point

<table>
<thead>
<tr>
<th></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</td>
<td>$67,640</td>
<td>$64,739</td>
<td>$63,624</td>
<td>$63,015</td>
<td></td>
</tr>
</tbody>
</table>

Cost Per Thousand (CPM)

<table>
<thead>
<tr>
<th></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>$10.18</td>
<td></td>
</tr>
<tr>
<td>Non-CPG</td>
<td>$41.1C</td>
<td>$38.03</td>
<td>$35.71</td>
<td>$21.93</td>
<td></td>
</tr>
<tr>
<td>Across</td>
<td>$13.82</td>
<td>$13.26</td>
<td>$12.78</td>
<td>$12.31</td>
<td></td>
</tr>
</tbody>
</table>

Note: Share shift slides include video + display.
Video Brand Effect and the Digital Multiplier: Driving Effectiveness With Duplication
Shifting Media Spend to Digital Results in Duplicated Reach…

...But is Duplicated Reach Effective?

- **100% TV**
- **95% TV**
- **90% TV**
- **85% TV**

**Note:** Simulations done in IMS Campaign RF

**Data Source:** TV/Internet Fusion

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Shifting Media Spend to Digital Results in Duplicated Reach:

- **Reach?**
- **5% Online**
- **10% Online**
- **15% Online**

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

- **57.6%** of TV budget shifted to online, across verticals.
- **57.6%** Reach
- **60.1%** Reach
- **61.2%** Reach
- **61.8%** Reach

**Incremental Reach for Same Spend**

- **+2.5% Reach**
- **+3.6% Reach**
- **+4.2% Reach**

**Duplicated Reach**

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

---

*In Share Shift slides, online includes digital video and display ads.

*In Brand Effect, digital video and display ads are shown separately.*
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

General Recall, Across Verticals

TV Only General Recall vs. TV + Online General Recall:
- TV + Video Ad in Full Episode Online: 53% vs. 55%
- TV + Video Ad in Short Form Video Online: 46% vs. 54%
- TV + Non-Video Ad Online (Banner Ad): 46% vs. 55%

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
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**

- **Video Ad in Full Episode Online**
  - TV Only Brand Recall: 27%
  - TV + Online Brand Recall: 36%
  - Increase: 33%

- **Video Ad in Short Form Video Online**
  - TV Only Brand Recall: 28%
  - TV + Online Brand Recall: 37%
  - Increase: 32%

- **Non-Video Ad Online (Banner Ad)**
  - TV Only Brand Recall: 28%
  - TV + Online Brand Recall: 35%
  - Increase: 25%

**General Recall, Across Verticals**

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
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></th>
<th>TV + Prior Online Exposure</th>
<th>TV Only</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>

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

- **TV + Prior Online Video Ad Exposure in Full Episode**
- **TV Commercials Only (Total)**

### Men 18-49
- General Recall: 49%, 41%
- Brand Recall: 42%, 32%
- Message Recall: 46%, 23%
- Likeability: 49%, 17%

### Men 18-34
- General Recall: 43%, 36%
- Brand Recall: 24%, 18%
- Message Recall: 26%, 18%
- Likeability: 13%, 10%

### Women 18-49
- General Recall: 50%, 43%
- Brand Recall: 32%, 25%
- Message Recall: 25%, 18%
- Likeability: 16%, 3%

### Women 18-34
- General Recall: 47%, 42%
- Brand Recall: 26%, 23%
- Message Recall: 19%, 16%
- Likeability: 14%, 12%

---

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.

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

All Brands

<table>
<thead>
<tr>
<th></th>
<th>TV + Prior Online Exposure</th>
<th>TV Only</th>
</tr>
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<tbody>
<tr>
<td>General Recall</td>
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<tr>
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<td>28%</td>
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</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.
TV data based on responses up to 1 day post-ad stream; Based on exposures to Short Form Online Video in the previous 7 days.
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

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.

Women 18-49
- TV + Prior Online Video Ad Exposure in Short Form Video:
  - General Recall: 48%, 51%
  - Brand Recall: 41%, 43%
  - Message Recall: 32%, 25%
  - Likeability: 23%, 17%
- TV Commercials Only (Total):
  - General Recall: 25%, 25%
  - Brand Recall: 18%, 18%
  - Message Recall: 16%, 16%
  - Likeability: 3%, 3%

Men 18-49
- TV + Prior Online Video Ad Exposure in Short Form Video:
  - General Recall: 42%, 48%
  - Brand Recall: 32%, 23%
  - Message Recall: 25%, 17%
  - Likeability: 18%, 12%
- TV Commercials Only (Total):
  - General Recall: 23%, 22%
  - Brand Recall: 17%, 17%
  - Message Recall: 12%, 12%
  - Likeability: 6%, 6%

Men 18-34
- TV + Prior Online Video Ad Exposure in Short Form Video:
  - General Recall: 39%, 41%
  - Brand Recall: 24%, 18%
  - Message Recall: 18%, 12%
  - Likeability: 13%, 10%
- TV Commercials Only (Total):
  - General Recall: 25%, 24%
  - Brand Recall: 18%, 18%
  - Message Recall: 12%, 12%
  - Likeability: 10%, 10%

Women 18-34
- TV + Prior Online Video Ad Exposure in Short Form Video:
  - General Recall: 36%, 47%
  - Brand Recall: 24%, 28%
  - Message Recall: 18%, 23%
  - Likeability: 12%, 16%
- TV Commercials Only (Total):
  - General Recall: 23%, 21%
  - Brand Recall: 18%, 16%
  - Message Recall: 12%, 14%
  - Likeability: 6%, 2%
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**: 55% (TV + Prior Online Exposure: 46%) vs. 20% (TV Only)
- **Brand Recall**: 35% (TV + Prior Online Exposure: 28%) vs. 28% (TV Only)
- **Message Recall**: 28% (TV + Prior Online Exposure: 40%) vs. 20% (TV Only)
- **Likeability**: 19% (TV + Prior Online Exposure: 15%) vs. 27% (TV Only)

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

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

<table>
<thead>
<tr>
<th></th>
<th>Men 18-49</th>
<th>Women 18-49</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TV+</td>
<td>TV Commercials Only (Total)</td>
</tr>
<tr>
<td>General Recall</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Likeability</td>
<td>25%</td>
<td>25%</td>
</tr>
</tbody>
</table>

TV+ Avg TV A18-49

<table>
<thead>
<tr>
<th></th>
<th>Men 18-34</th>
<th>Women 18-34</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TV+</td>
<td>TV Commercials Only (Total)</td>
</tr>
<tr>
<td>General Recall</td>
<td>45%</td>
<td>47%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>36%</td>
<td>26%</td>
</tr>
<tr>
<td>Likeability</td>
<td>24%</td>
<td>23%</td>
</tr>
</tbody>
</table>

TV+ Avg TV A18-34

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

- **General Recall**: 64% (Online), 49% (TV), 46% (Online & TV)
- **Brand Recall**: 50% (Online), 32% (TV), 27% (Online & TV)
- **Message Recall**: 40% (Online), 24% (TV), 20% (Online & TV)
- **Likeability**: 28% (Online), 17% (TV), 15% (Online & TV)

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+

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%

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

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

Likeability
- Short Form Video: 17%
- Standard TV (Total): 15%
Video Ads in Full Episode Players Are More Effective Than TV Commercials

- General Recall: 64% (Video Ads) vs. 46% (Commercials)
- Brand Recall: 50% (Video Ads) vs. 27% (Commercials)
- Message Recall: 40% (Video Ads) vs. 20% (Commercials)
- Likeability: 28% (Video Ads) vs. 15% (Commercials)

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:**

- Documentary: 71%
- SciFi: 69%
- Talk: 68%
- Drama: 65%
- Animation: 64%

Avg. A18+ Gen. Recall of Full Ep Video Ads: 42%

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

- Finance: 50%
- Retail: 47%
- Restaurants: 47%
- Hospitality: 45%
- Pharma: 45%

Avg. A18+ Gen. Recall of TV Ads: 50%

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

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

….in These **Ad Verticals:**

<table>
<thead>
<tr>
<th></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>52%</td>
</tr>
<tr>
<td>Telecom</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Pharma</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>48%</td>
<td>48%</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></th>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech</td>
<td>45%</td>
<td>27%</td>
<td>20%</td>
<td>14%</td>
</tr>
<tr>
<td>Telecom</td>
<td>42%</td>
<td>23%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>37%</td>
<td>16%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Pharma</td>
<td>42%</td>
<td>16%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>48%</td>
<td>23%</td>
<td>20%</td>
<td>16%</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

- **Men 18-49**
  - Online Video Ad in Short Form Video: 43% Average Recall, 27% Brand Recall, 21% Message Recall, 15% Likeability
  - Standard TV Commercial (Total): 42% Average Recall, 22% Brand Recall, 16% Message Recall, 12% Likeability

- **Women 18-49**
  - Online Video Ad in Short Form Video: 45% Average Recall, 28% Brand Recall, 21% Message Recall, 14% Likeability
  - Standard TV Commercial (Total): 45% Average Recall, 27% Brand Recall, 20% Message Recall, 14% Likeability

- **Men 18-34**
  - Online Video Ad in Short Form Video: 38% Average Recall, 22% Brand Recall, 16% Message Recall, 12% Likeability
  - Standard TV Commercial (Total): 40% Average Recall, 16% Brand Recall, 12% Message Recall, 10% Likeability

- **Women 18-34**
  - Online Video Ad in Short Form Video: 45% Average Recall, 27% Brand Recall, 20% Message Recall, 14% Likeability
  - Standard TV Commercial (Total): 42% Average Recall, 23% Brand Recall, 16% Message Recall, 12% Likeability

*Note: More slides are available in the appendix that show Short Form vs. TV Brand Effect across the following demos: A18+, M18+, W18+, A18-49, A18-34, A35-64, M35-64, W35-64*
Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Video Ad in Full Episode Online (%)</th>
<th>Standard TV Commercial (Total) (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-49</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Women 18-49</td>
<td>41%</td>
<td>43%</td>
</tr>
<tr>
<td>Men 18-34</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Women 18-34</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

Copyright © 2012 The Nielsen Company. Confidential and proprietary.
Across Several Ad Verticals, Short Form Online Video Ads Are More Memorable Than TV Ads

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

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

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

Note: More Brand Effectiveness metrics (Brand Recall, Message Recall, Likeability) for Ads in Full Episodes Online vs. TV across Ad Verticals are available in slides in the appendix.
Across Ad Verticals, **Brands Are More Memorable in Full Episodes Online Than on TV Commercials**

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

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

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Full Episodes Online</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospitality</td>
<td>55%</td>
<td>26%</td>
</tr>
<tr>
<td>Finance</td>
<td>53%</td>
<td>30%</td>
</tr>
<tr>
<td>Retail</td>
<td>53%</td>
<td>30%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>53%</td>
<td>32%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>50%</td>
<td>30%</td>
</tr>
<tr>
<td>Pharma</td>
<td>49%</td>
<td>26%</td>
</tr>
<tr>
<td>Health &amp; Beauty</td>
<td>45%</td>
<td>19%</td>
</tr>
<tr>
<td>Telecom</td>
<td>44%</td>
<td>26%</td>
</tr>
<tr>
<td>Tech</td>
<td>44%</td>
<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.

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 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+

- Video Ads in Full Episodes Online
  - Restaurants: 45%
  - Hospitality: 44%
  - Retail: 44%
  - Finance: 43%
  - Food & Beverage: 40%

- TV Commercials (Broadcast + Cable)
  - Food & Beverage: 36%
  - Pharma: 36%
  - Telecom: 35%
  - Health & Beauty: 34%
  - Auto: 32%
  - Tech: 18%

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

Likeability of Ads Across Categories, Adults 18+

<table>
<thead>
<tr>
<th>Category</th>
<th>Video Ads in Full Episodes Online</th>
<th>TV Commercials (Broadcast + Cable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Beauty</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>34%</td>
<td>14%</td>
</tr>
<tr>
<td>Retail</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>30%</td>
<td>18%</td>
</tr>
<tr>
<td>Finance</td>
<td>28%</td>
<td>14%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>27%</td>
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</tr>
<tr>
<td>Auto</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Tech</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Telecom</td>
<td>23%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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.
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

![Bar chart showing general recall across genres and video formats](chart.png)

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.

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
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+

- **General Recall:** 64%
- **Brand Recall:** 44%
- **Message Recall:** 38%
- **Likeability:** 19%

### Non-CPG Adults 18+

- **General Recall:** 65%
- **Brand Recall:** 47%
- **Message Recall:** 50%
- **Likeability:** 28%

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

---

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.
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: 50%
- Standard TV Commercial (Total): 42%

**Non-CPG Adults 18+**

- Video Ad in Short Form Video Online: 48%
- Standard TV Commercial (Total): 49%

Note: Ads in CPG and non-CPG brand effect 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% Recall of Video Ads, 44% Recall of TV Ads  
- **SciFi**: 68% Recall of Video Ads, 48% Recall of TV Ads  
- **Documentary** (Non-Competition): 65% Recall of Video Ads, 39% Recall of TV Ads  
- **Reality**: 63% Recall of Video Ads, 43% Recall of TV Ads  
- **Drama/Adv.**: 61% Recall of Video Ads, 48% Recall of TV Ads  

....For **Non-CPG**:  

- **Documentary** (Broadcast + Cable): 73% Recall of Video Ads, 44% Recall of TV Ads  
- **SciFi**: 70% Recall of Video Ads, 53% Recall of TV Ads  
- **Talk**: 70% Recall of Video Ads, 45% Recall of TV Ads  
- **Drama/Adv.**: 66% Recall of Video Ads, 52% Recall of TV Ads  
- **Animation**: 64% Recall of Video Ads, 44% Recall of TV Ads  

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

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

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

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

**Video Ad in Short Form Video Online**

- **CPG Men 18-49**
  - General Recall: 44%
  - Brand Recall: 30%
  - Message Recall: 23%
  - Likeability: 17%

- **CPG Women 18-49**
  - General Recall: 47%
  - Brand Recall: 31%
  - Message Recall: 24%
  - Likeability: 16%

**Standard TV Commercial (Total)**

- **CPG Men 18-34**
  - General Recall: 46%
  - Brand Recall: 40%
  - Message Recall: 29%
  - Likeability: 22%

- **CPG Women 18-34**
  - General Recall: 41%
  - Brand Recall: 24%
  - Message Recall: 22%
  - Likeability: 15%

Note: Ads in CPG and non-CPG brand effect 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

### Non-CPG Men 18-49

- **General Recall**: 42%
- **Brand Recall**: 26%
- **Message Recall**: 20%
- **Likeability**: 14%

### Non-CPG Women 18-49

- **General Recall**: 46%
- **Brand Recall**: 27%
- **Message Recall**: 20%
- **Likeability**: 13%

### Non-CPG Men 18-34

- **General Recall**: 38%
- **Brand Recall**: 21%
- **Message Recall**: 16%
- **Likeability**: 12%

### Non-CPG Women 18-34

- **General Recall**: 44%
- **Brand Recall**: 26%
- **Message Recall**: 18%
- **Likeability**: 13%

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

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.

IAB Online Video Study

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

<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>CPG Men 18-49</td>
<td>59%</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td>CPG Women 18-49</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>CPG Men 18-34</td>
<td>52%</td>
</tr>
<tr>
<td></td>
<td>CPG Women 18-34</td>
<td>58%</td>
</tr>
</tbody>
</table>

Note: Ads in CPG and non-CPG brand effect 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

<table>
<thead>
<tr>
<th></th>
<th>Video Ad in Short Form Video Online</th>
<th>Standard TV Commercial (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-CPG Men 18-49</td>
<td>General Recall: 63%</td>
<td>General Recall: 63%</td>
</tr>
<tr>
<td></td>
<td>Brand Recall: 42%</td>
<td>Brand Recall: 44%</td>
</tr>
<tr>
<td></td>
<td>Message Recall: 38%</td>
<td>Message Recall: 47%</td>
</tr>
<tr>
<td></td>
<td>Likeability: 24%</td>
<td>Likeability: 25%</td>
</tr>
<tr>
<td>Non-CPG Women 18-49</td>
<td>General Recall: 58%</td>
<td>General Recall: 58%</td>
</tr>
<tr>
<td></td>
<td>Brand Recall: 42%</td>
<td>Brand Recall: 41%</td>
</tr>
<tr>
<td></td>
<td>Message Recall: 32%</td>
<td>Message Recall: 31%</td>
</tr>
<tr>
<td></td>
<td>Likeability: 18%</td>
<td>Likeability: 22%</td>
</tr>
</tbody>
</table>

| Non-CPG Men 18-34      | General Recall: 58%                | General Recall: 58%            |
|                        | Brand Recall: 37%                  | Brand Recall: 41%              |
|                        | Message Recall: 32%                | Message Recall: 31%            |
|                        | Likeability: 18%                   | Likeability: 22%               |

| Non-CPG Women 18-34    | General Recall: 58%                | General Recall: 58%            |
|                        | Brand Recall: 41%                  | Brand Recall: 41%              |
|                        | Message Recall: 31%                | Message Recall: 31%            |
|                        | Likeability: 22%                   | Likeability: 22%               |

Note: Ads in CPG and non-CPG brand effect 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>Gen. Recall of Full Episode Video Ads</th>
<th>Gen. Recall of TV Ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Video Ads in Full Episode Players</td>
<td>Total TV Ads (Broadcast + Cable)</td>
</tr>
<tr>
<td>Animation: 72%</td>
<td>44%</td>
</tr>
<tr>
<td>SciFi: 68%</td>
<td>48%</td>
</tr>
<tr>
<td>Document. Tribute (Non-Compet.): 65%</td>
<td>39%</td>
</tr>
<tr>
<td>Reality (Non-Competition): 63%</td>
<td>43%</td>
</tr>
<tr>
<td>Drama/Adv.: 61%</td>
<td>48%</td>
</tr>
<tr>
<td>SitCom: 61%</td>
<td>41%</td>
</tr>
<tr>
<td>Talk: 60%</td>
<td>43%</td>
</tr>
<tr>
<td>Game Show: 58%</td>
<td>44%</td>
</tr>
<tr>
<td>(Reality [ten]): 56%</td>
<td>46%</td>
</tr>
<tr>
<td>Variety Gen.: 58%</td>
<td>42%</td>
</tr>
<tr>
<td>Instruction: 38%</td>
<td>48%</td>
</tr>
</tbody>
</table>

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

- Avg. Gen. Recall of Full Episode Video Ads: 64%
- Avg. Gen. Recall of TV Ads: 46%

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

_Nielsen Video Brand Effect (IAG), 01.01.11 - 03.31.12, A18+ Online & TV data based on responses up to 1 day post-ad stream Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary_
Across Genres, Non-CPG Online Video Ads During Full Episodes Are More Memorable Than TV Ads

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

**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%
  - Reality (Competition): 63%
  - Reality (Non-Competition): 63%
  - Game Show: 62%
  - News Mag: 59%
  - Variety-Gen.: 54%

- **Total TV Ads (Broadcast + Cable)**
  - Documentaries: 44%
  - SciFi: 53%
  - Talk: 45%
  - Drama/Adv: 45%
  - Animation: 38%
  - Instruction: 44%
  - Sitcom: 44%
  - Reality (Competition): 49%
  - Reality (Non-Competition): 45%
  - Game Show: 45%
  - News Mag: 50%
  - Variety-Gen.: 44%

**Note:** Ads in CPG and non-CPG brand effect 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 for 20 seconds, the average length of viewing per online video ad. Additionally, 87% of those viewing ads in online video complete them.
Those viewing Long Form content watch ads longer than those viewing Short Form content.

Average Ad Time Viewed (seconds):
- Long Form: 21.4 seconds
- Short Form: 13.6 seconds

Average % Completion of Ad Viewed:
- Long Form: 88%
- Short Form: 79%

% Increase of Long Form over Short Form:
- Average Ad Time Viewed: 57%
- Average % Completion of Ad Viewed: 11%
Mid-Roll Ads* Have Higher Viewing Completion Rates Than Either Pre-roll Or Post-roll Ads

Nielsen Video Analytics Data
Measurement Period: January 2011-March 2012
IAB Online Video Study

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 videos 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

Active Online Reach (%)

- **Short Form Content**: 92%
- **Long Form Content**: 20%

*Nearly ALL Streamers Watch Short Form Video

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

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.
Most Online Video Viewed is Short Form

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

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

<table>
<thead>
<tr>
<th></th>
<th>Total Number of Videos</th>
<th>Total Time Spent Streaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Form Video</td>
<td>95%</td>
<td>83%</td>
</tr>
<tr>
<td>Long Form Video</td>
<td>5%</td>
<td>17%</td>
</tr>
</tbody>
</table>

*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.

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.

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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)*

YoY Change: +9%  +2%  -1%

YoY Change: -1%  +18%  -3%

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.

Nielsen NetView, March 2012
IAB Online Video Study
Copyright © 2012 The Nielsen Company. Confidential and proprietary.
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 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.

Avg. Monthly Min. Streaming **UGC**: 27.7 Billion Minutes  
Avg. Monthly Min. Streaming **Pro Content**: 17.1 Billion Minutes

**Total Time Spent Streaming**

![Graph showing the comparison between professionally produced content and user-generated content over time, with YoY change indicated as +10%, +8%, and -1%.](chart)

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

Professional Content

- Male: 46%
- Female: 54%

UGC

- Male: 46%
- Female: 54%

But Men Stream More Professional Videos and UGC, especially UGC

Total Professionally Produced Videos Streamed

- Male: 47%
- Female: 53%

Time Spent Streaming: F 47% : M 53%

Total UGC Videos Streamed

- Male: 42%
- Female: 58%

Time Spent Streaming: F 43% : M 57%

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.

Nielsen NetView, March 2012
IAB Online Video Study

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

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%

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

Nielsen NetView, March 2012
Home & Work Usage
IAB Online Video Study

Copyright © 2012 The Nielsen Company. Confidential and proprietary.
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.)**

<table>
<thead>
<tr>
<th>Month</th>
<th>2011</th>
<th>2012</th>
<th>YoY %Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td></td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>Feb</td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Mar</td>
<td></td>
<td></td>
<td>-29%</td>
</tr>
<tr>
<td>Apr</td>
<td></td>
<td></td>
<td>25%</td>
</tr>
<tr>
<td>May</td>
<td></td>
<td></td>
<td>-28%</td>
</tr>
<tr>
<td>Jun</td>
<td></td>
<td></td>
<td>-42%</td>
</tr>
<tr>
<td>Jul</td>
<td></td>
<td></td>
<td>-33%</td>
</tr>
<tr>
<td>Aug</td>
<td></td>
<td></td>
<td>-42%</td>
</tr>
<tr>
<td>Sep</td>
<td></td>
<td></td>
<td>-33%</td>
</tr>
<tr>
<td>Oct</td>
<td></td>
<td></td>
<td>-36%</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. Full Episodes are considered Long Form Content.

*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.

Source: NetView Online Panel
Total Minutes Spent Viewing (Sum Total)
IAB Online Video Study

Copyright © 2012 The Nielsen Company. Confidential and proprietary.
### 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>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>News, Info &amp; Portals</td>
<td>21%</td>
<td>26%</td>
<td>38%</td>
<td>16%</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>TV Shows &amp; Clips</td>
<td>18%</td>
<td>28%</td>
<td>38%</td>
<td>16%</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>Music</td>
<td>17%</td>
<td>25%</td>
<td>31%</td>
<td>12%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Sports/Highlights</td>
<td>11%</td>
<td>25%</td>
<td>41%</td>
<td>23%</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Movie Trailers</td>
<td>13%</td>
<td>27%</td>
<td>40%</td>
<td>20%</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Games/Gaming Trailers</td>
<td>24%</td>
<td>27%</td>
<td>41%</td>
<td>9%</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>Movies</td>
<td>22%</td>
<td>26%</td>
<td>40%</td>
<td>12%</td>
<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)

- Q1 2011: 28,538
- Q4 2011: 33,526
- Q1 2012: 35,957

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
TV Viewing is Flat Among 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
- Online Video Ads in Full Episode Players: 64%
- Broadcast TV Ads: 52%
- Cable TV Ads: 44%

Brand Recall
- Online Video Ads in Full Episode Players: 50%
- Broadcast TV Ads: 33%
- Cable TV Ads: 26%

Message Recall
- Online Video Ads in Full Episode Players: 40%
- Broadcast TV Ads: 25%
- Cable TV Ads: 19%

Likeability
- Online Video Ads in Full Episode Players: 28%
- Broadcast TV Ads: 17%
- Cable TV Ads: 14%

Online is Twice as Effective as 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

- **General Recall**: 48% TV + Prior Online Video Ad Exposure in Short Form Video vs. 41% TV Commercials Only
- **Brand Recall**: 32% vs. 23%
- **Message Recall**: 25% vs. 17%
- **Likeability**: 18% vs. 12%

- **Men 18-49**
  - TV + Prior Online Video Ad Exposure: 49%
  - TV Commercials Only: 47%

- **Women 18-49**
  - TV + Prior Online Video Ad Exposure: 51%
  - TV Commercials Only: 49%

- **Adults 18-34**
  - TV + Prior Online Video Ad Exposure: 49%
  - TV Commercials Only: 47%

- **Adults 35-64**
  - TV + Prior Online Video Ad Exposure: 49%
  - TV Commercials Only: 47%

*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

**Men 18-49**
- TV + Prior Online Video Ad Exposure in Full Episode:
  - General Recall: 49%
  - Brand Recall: 41%
  - Message Recall: 32%
  - Likeability: 23%
- TV Commercials Only (Total):
  - General Recall: 50%
  - Brand Recall: 43%
  - Message Recall: 32%
  - Likeability: 25%

**Women 18-49**
- TV + Prior Online Video Ad Exposure in Full Episode:
  - General Recall: 58%
  - Brand Recall: 48%
  - Message Recall: 42%
  - Likeability: 30%
- TV Commercials Only (Total):
  - General Recall: 50%
  - Brand Recall: 43%
  - Message Recall: 25%
  - Likeability: 25%

**Adults 18-34**
- TV + Prior Online Video Ad Exposure in Full Episode:
  - General Recall: 43%
  - Brand Recall: 39%
  - Message Recall: 25%
  - Likeability: 19%
- TV Commercials Only (Total):
  - General Recall: 58%
  - Brand Recall: 48%
  - Message Recall: 42%
  - Likeability: 30%

**Adults 35-64**
- TV + Prior Online Video Ad Exposure in Full Episode:
  - General Recall: 43%
  - Brand Recall: 39%
  - Message Recall: 25%
  - Likeability: 19%
- TV Commercials Only (Total):
  - General Recall: 58%
  - Brand Recall: 48%
  - Message Recall: 42%
  - Likeability: 30%

**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.

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

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

**Men 18-49**
- General Recall: 41%, 44%
- Brand Recall: 23%, 30%
- Message Recall: 17%, 25%
- Likeability: 12%, 18%

**Women 18-49**
- General Recall: 44%, 30%
- Brand Recall: 25%, 22%
- Message Recall: 16%, 18%
- Likeability: 13%, 16%

**Adults 18-34**
- General Recall: 49%, 39%
- Brand Recall: 21%, 30%
- Message Recall: 14%, 31%
- Likeability: 11%, 23%

**Adults 35-64**
- General Recall: 58%, 39%
- Brand Recall: 21%, 30%
- Message Recall: 13%, 31%
- Likeability: 16%, 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.
Duplication: Prior Exposure to Short Form Online Video Ads Makes TV More Effective

Adults 18+

<table>
<thead>
<tr>
<th></th>
<th>TV + Prior Online Video Ad Exposure in Short Form Video</th>
<th>TV Commercials Only (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>55%</td>
<td>49%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Likeability</td>
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<td>24%</td>
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</table>

Adults 18-34

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<td>30%</td>
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Adults 18-49

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<thead>
<tr>
<th></th>
<th>TV + Prior Online Video Ad Exposure in Short Form Video</th>
<th>TV Commercials Only (Total)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>28%</td>
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</tr>
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<td>17%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>Likeability</td>
<td>20%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Adults 35-64

<table>
<thead>
<tr>
<th></th>
<th>TV + Prior Online Video Ad Exposure in Short Form Video</th>
<th>TV Commercials Only (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Likeability</td>
<td>11%</td>
<td>16%</td>
</tr>
</tbody>
</table>
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: 55%
    - Brand Recall: 36%
    - Message Recall: 21%
    - Likeability: 15%
  - **Women 18+**
    - General Recall: 55%
    - Brand Recall: 27%
    - Message Recall: 28%
    - Likeability: 20%
  - **Men 18-49**
    - General Recall: 55%
    - Brand Recall: 17%
    - Message Recall: 25%
    - Likeability: 12%
  - **Women 18-49**
    - General Recall: 51%
    - Brand Recall: 18%
    - Message Recall: 25%
    - Likeability: 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.

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

- TV + Prior Online Video Ad Exposure in Short Form Video
- TV Commercials Only (Total)

**Men 18-34**
- General Recall: 41% vs 36%
- Brand Recall: 24% vs 18%
- Message Recall: 18% vs 12%
- Likeability: 13% vs 10%

**Women 18-34**
- General Recall: 47% vs 41%
- Brand Recall: 28% vs 23%
- Message Recall: 21% vs 16%
- Likeability: 14% vs 12%

**Men 35-64**
- General Recall: 49% vs 45%
- Brand Recall: 31% vs 38%
- Message Recall: 24% vs 29%
- Likeability: 17%

**Women 35-64**
- General Recall: 48% vs 40%
- Brand Recall: 29% vs 32%
- Message Recall: 21% vs 23%
- Likeability: 15%

**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+

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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.

IAB Online Video Study
Copyright © 2012 The Nielsen Company. Confidential and proprietary.
Short Form Online Video is More Effective Than TV Across Demos

- **Adults 18+**
  - General Recall: 49% (Online) vs 47% (TV)
  - Brand Recall: 32% (Online) vs 28% (TV)
  - Message Recall: 24% (Online) vs 21% (TV)
  - Likeability: 17% (Online) vs 15% (TV)

- **Adults 18-49**
  - General Recall: 45% (Online) vs 44% (TV)
  - Brand Recall: 28% (Online) vs 25% (TV)
  - Message Recall: 21% (Online) vs 18% (TV)
  - Likeability: 14% (Online) vs 13% (TV)

- **Adults 18-34**
  - General Recall: 42% (Online) vs 40% (TV)
  - Brand Recall: 25% (Online) vs 21% (TV)
  - Message Recall: 18% (Online) vs 15% (TV)
  - Likeability: 13% (Online) vs 12% (TV)

- **Adults 35-64**
  - General Recall: 51% (Online) vs 50% (TV)
  - Brand Recall: 35% (Online) vs 31% (TV)
  - Message Recall: 27% (Online) vs 23% (TV)
  - Likeability: 19% (Online) vs 17% (TV)

- **Notes:**
  - 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.
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%, 47%
- Brand Recall: 33%, 29%
- Message Recall: 25%, 22%
- Likeability: 18%, 16%

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

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

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

**Men 18-34**
- **Video Ads in Short Form Video Online:**
  - General Recall: 38% (Online), 37% (TV)
  - Brand Recall: 22% (Online), 19% (TV)
  - Message Recall: 16% (Online), 12% (TV)
  - Likeability: 12% (Online), 10% (TV)

**Standard TV Commercials (Total)**
- **Women 18-34**
  - General Recall: 45% (Online), 42% (TV)
  - Brand Recall: 27% (Online), 23% (TV)
  - Message Recall: 20% (Online), 16% (TV)
  - Likeability: 14% (Online), 12% (TV)

**Men 35-64**
- **Video Ads in Short Form Video Online:**
  - General Recall: 51% (Online), 50% (TV)
  - Brand Recall: 36% (Online), 32% (TV)
  - Message Recall: 28% (Online), 25% (TV)
  - Likeability: 21% (Online), 18% (TV)

**Standard TV Commercials (Total)**
- **Women 35-64**
  - General Recall: 51% (Online), 49% (TV)
  - Brand Recall: 33% (Online), 30% (TV)
  - Message Recall: 25% (Online), 22% (TV)
  - Likeability: 17% (Online), 16% (TV)

---

*Standard TV includes TV ads on both cable and broadcast networks. Primetime, non-sports.*

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

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

*Online & TV data based on responses up to 1 day post-ad stream.*

*Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary.*
Short Form Online Video is More Effective Than TV Across Demos

Online Video Ad in Short Form Video

Standard TV Commercial (Total)

<table>
<thead>
<tr>
<th></th>
<th>Men 18-49</th>
<th>Women 18-49</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Message Recall</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Likeability</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Adults 18-34</td>
<td>42%</td>
<td>51%</td>
</tr>
<tr>
<td>Adults 35-64</td>
<td>25%</td>
<td>35%</td>
</tr>
</tbody>
</table>

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

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

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

62% Avg. Recall A18-49

42% Avg. Recall A18-49

Video Ad in Full Episode Online

Standard TV Commercial (Total)

Men 18-49

Women 18-49

General Recall

Brand Recall

Message Recall

Likeability

Adults 18-34

Adults 35-64

62% 41% 48% 38% 26%

62% 43% 47% 38% 23%

57% 41% 41% 32% 21%

69% 48% 55% 46% 34%

42% 23% 17% 12%

39% 21% 14% 21% 11%

55% 30% 22% 16%

62%

47%

38%

23%

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.

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+

Copyright © 2012 The Nielsen Company. Confidential and proprietary.
Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

- **Adults 18+**
  - General Recall: Video Ad 64%, Standard TV 46%
  - Brand Recall: Video Ad 50%, Standard TV 27%
  - Message Recall: Video Ad 40%, Standard TV 20%
  - Likeability: Video Ad 28%, Standard TV 15%

- **Adults 18-49**
  - General Recall: Video Ad 62%, Standard TV 42%
  - Brand Recall: Video Ad 47%, Standard TV 24%
  - Message Recall: Video Ad 38%, Standard TV 17%
  - Likeability: Video Ad 24%, Standard TV 13%

- **Adults 18-34**
  - General Recall: Video Ad 57%, Standard TV 39%
  - Brand Recall: Video Ad 41%, Standard TV 21%
  - Message Recall: Video Ad 32%, Standard TV 14%
  - Likeability: Video Ad 21%, Standard TV 11%

- **Adults 35-64**
  - General Recall: Video Ad 69%, Standard TV 48%
  - Brand Recall: Video Ad 55%, Standard TV 30%
  - Message Recall: Video Ad 46%, Standard TV 22%
  - Likeability: Video Ad 34%, Standard TV 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.*
Across Demos, Video Ads are More Effective in Full Episodes Online Than on TV

- **Video Ad in Full Episode Online**
  - Men 18+
    - General Recall: 65% (Online) vs. 45% (Standard TV)
    - Brand Recall: 52% (Online) vs. 28% (Standard TV)
    - Message Recall: 42% (Online) vs. 21% (Standard TV)
    - Likeability: 33% (Online) vs. 15% (Standard TV)
  - Men 18-49
    - General Recall: 62% (Online) vs. 41% (Standard TV)
    - Brand Recall: 48% (Online) vs. 23% (Standard TV)
    - Message Recall: 38% (Online) vs. 17% (Standard TV)
    - Likeability: 26% (Online) vs. 12% (Standard TV)

- **Standard TV Commercial (Total)**
  - Women 18+
    - General Recall: 63% (Online) vs. 46% (Standard TV)
    - Brand Recall: 48% (Online) vs. 27% (Standard TV)
    - Message Recall: 39% (Online) vs. 20% (Standard TV)
    - Likeability: 24% (Online) vs. 14% (Standard TV)
  - Women 18-49
    - General Recall: 62% (Online) vs. 43% (Standard TV)
    - Brand Recall: 47% (Online) vs. 25% (Standard TV)
    - Message Recall: 38% (Online) vs. 18% (Standard TV)
    - Likeability: 23% (Online) vs. 13% (Standard TV)

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

<table>
<thead>
<tr>
<th>General Recall</th>
<th>Brand Recall</th>
<th>Message Recall</th>
<th>Likeability</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Men 18-34</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Video Ad</td>
<td>57%</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>Standard TV</td>
<td>36%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Women 18-34</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Video Ad</td>
<td>58%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Standard TV</td>
<td>41%</td>
<td>23%</td>
<td>16%</td>
</tr>
</tbody>
</table>

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

![Bar chart showing brand recall across genres for online video and TV ads.](chart.png)

**50% Avg. Brand Recall for Video Ads**

**27% Avg. Brand Recall for TV Ads**
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>Documentary</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>Talk</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>SciFi</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Instruction/ Advice</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Dramatic</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Action/Adventure</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Animation</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Sitcom</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Game Show</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Reality</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Variety Gen.</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>News Mag.</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Mag.</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

**Note:**
- **Video Ads in Full Episode Players**
- **Total TV Ads (Broadcast + Cable)**
- 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.
- Brand recall only asked of those who correctly recall general recall.
- Message recall, only shown to those who correctly recall brand.

IAB Online Video Study

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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

Adults 18+ Who Liked the Ad, Across Genres

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

Talk: 40% | 12%
Documentary: 35% | 14%
SciFi: 34% | 17%
Game Show: 31% | 15%
Reality: 29% | 15%
Drama/Adventure: 28% | 17%
Variety Gen.: 28% | 13%
Animation: 26% | 13%
Sitcom: 26% | 13%
News Mag: 23% | 16%
Instruction/Advice: 16% | 11%

28% Avg. Likeability of Video Ads
15% Avg. Likeability of TV Ads

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**: 71% (Documentary/Salute/Tribute), 58% (Science Fiction), 68% (Talk Format)
- **General Recall TV**: 58% (Documentary/Salute/Tribute), 35% (Science Fiction), 44% (Talk Format)
- **Message Recall FEP**: 52% (Documentary/Salute/Tribute), 41% (Science Fiction), 49% (Talk Format)
- **Message Recall TV**: 33% (Documentary/Salute/Tribute), 25% (Science Fiction), 39% (Talk Format)
- **Brand Recall FEP**: 57% (Documentary/Salute/Tribute), 46% (Science Fiction), 57% (Talk Format)
- **Brand Recall TV**: 46% (Documentary/Salute/Tribute), 27% (Science Fiction), 26% (Talk Format)
- **Likeability FEP**: 42% (Documentary/Salute/Tribute), 28% (Science Fiction), 40% (Talk Format)
- **Likeability TV**: 24% (Documentary/Salute/Tribute), 17% (Science Fiction), 12% (Talk Format)

- **Documentary/Salute/Tribute**: 65%
- **Science Fiction**: 64%
- **Talk Format**: 68%
- **Drama/Adventure**: 49%
- **Animation**: 44%

 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 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

Brand Recall Across Ad Verticals, Adults 18+

- Average Brand Recall of Video Ads: 32%
- Average Brand Recall of TV Ads: 28%

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

Brand 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, Telecom, Pharma, Food & Beverage and Tech Categories Significantly Outperform TV
- Online Video Ads for Health & Beauty and Pharma Have 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>13%</td>
</tr>
<tr>
<td>Telecom</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Pharma</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Tech</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Finance</td>
<td>23%24%</td>
<td>21%</td>
</tr>
<tr>
<td>Restaurants</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Auto</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

**Average Message Recall**
- **Video Ads**: 24%
- **TV Commercials**: 21%

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.

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

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

<table>
<thead>
<tr>
<th>Ad Vertical</th>
<th>Average Likeability of Video Ads</th>
<th>Average Likeability of TV Ads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Beauty</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Tech</td>
<td>19%</td>
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<td>Finance</td>
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</tr>
<tr>
<td>Auto</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Hospitality</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note: Limited to the same brands that streamed online and aired on TV during the same period; specific creative executions may vary.
Methodology Overviews
Nielsen Panel Methodologies
Nielsen Online NetView Panel

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

Meter capabilities include:
- Web measurement
- Applications Tracking
- Device Measurement
- Streaming Media
- Audio Measurement
- SiteCensus Data
- Page Content
- Full URL detail
- Search terms
Nielsen Cross Platform Homes Panel – Single 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>
<th>Computer, Tablet or Mobile*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live TV &amp; Live +1 DVR</td>
<td></td>
</tr>
<tr>
<td>Self-reported TV viewing</td>
<td>Tagged banner/video ads</td>
</tr>
</tbody>
</table>

**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.**

<table>
<thead>
<tr>
<th>Nielsen captures exposures in each medium</th>
<th>Program Engagement + Ad Recall</th>
<th>Ad Recall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panelists 13+ are surveyed on RewardTV</td>
<td>Prompt to engage on RewardTV</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Insights and Recommendations Provided</th>
<th>Platform comparison</th>
<th>Cross-media impact</th>
</tr>
</thead>
</table>

*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.
Standard Ad Questions

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

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

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

**Likeability**
- How much did you like this advertisement?
  - I liked it a lot
  - I liked it somewhat
  - I am neutral about this advertisement
  - I disliked it somewhat
  - I disliked it a lot
TV Brand Effect ad performance metrics defined

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

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

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**

**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
<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 (Max. Up to 7 days)</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?

Sherrill Mane
SVP Research, Analytics & Measurement, IAB
sherrill@iab.net

Kristina Sruoginis
Research Director, IAB
kristina@iab.net