



THE MOBILE TIPPING POINT

**BEST PRACTICES FOR ACCELERATING
MOBILE BRAND ADVERTISING GROWTH**



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EXECUTIVE SUMMARY

The new mobile medium represents an appealing opportunity for brand marketers - enabling them to reach a pool of consumers that are growing by the day anytime and anywhere. Because of its relative youth, however, there is still confusion over how best to engage in mobile advertising. Differences in technology mean that marketers cannot always employ the same best practices in mobile that are used for television or online advertising.

Unlike the online medium, mobile is being adopted for branding purposes relatively early. However, mobile marketers and media owners identified the inability to measure the effectiveness of their mobile efforts consistently with other media as one of their biggest pain points, and a significant barrier to mobile growth.

Through interviews with advertisers, agencies, and media providers, this paper provides insights on current mobile advertising activity, the mobile advertising outlook for the coming year, and best practices emerging for measuring and optimizing mobile advertising.

Highlights from this report include

- Spending on mobile brand initiatives will grow faster than spending on direct response initiatives in 2014. One-fifth (21%) of advertisers will increase their mobile brand spend by more than 20 percent in 2014.
- Roughly three-quarters of new mobile funds will come at the expense of other online and offline budgets.
- Advertisers are increasingly using mobile advertising as an integrated, cross-platform tactic, and are running it in conjunction with other online (90%) and offline media (80%).
- Accordingly, marketers would “prefer to use the exact same metrics used in the offline medium, and additional metrics specific to the mobile medium” to measure their mobile campaigns (39%).
- Advertisers most desire GRPs to measure audience reach (37%) and brand lift to measure ROI (53%). Publishers, however, mainly report ad server impressions (78%) and clickthrough rates (74%).
- As a result of this misalignment, many advertisers (55%) are doubtful or unconvinced of publishers’ targeting claims and about mobile advertising’s effectiveness, indicating that the medium’s potential growth may be hampered by a lack of relevant metrics that are widely adopted and used.

- In addition to relevant metrics, there are other best practices that, if adopted, brands and agencies said would increase their use of mobile brand advertising, including:
 - Alignment on and communication of campaign goals before the campaign start (68%)
 - Monitoring campaigns for in-flight improvement opportunities (68%)
 - Calculating the ROI of every campaign (77%)
 - Measuring reach and ROI at the same time (70%)

Media sellers and agencies that adopt these best practices and invest in what is needed to deliver these capabilities will be in the best position to capture resulting growth in mobile brand spending.



FOLLOWING CONSUMERS' LEAD

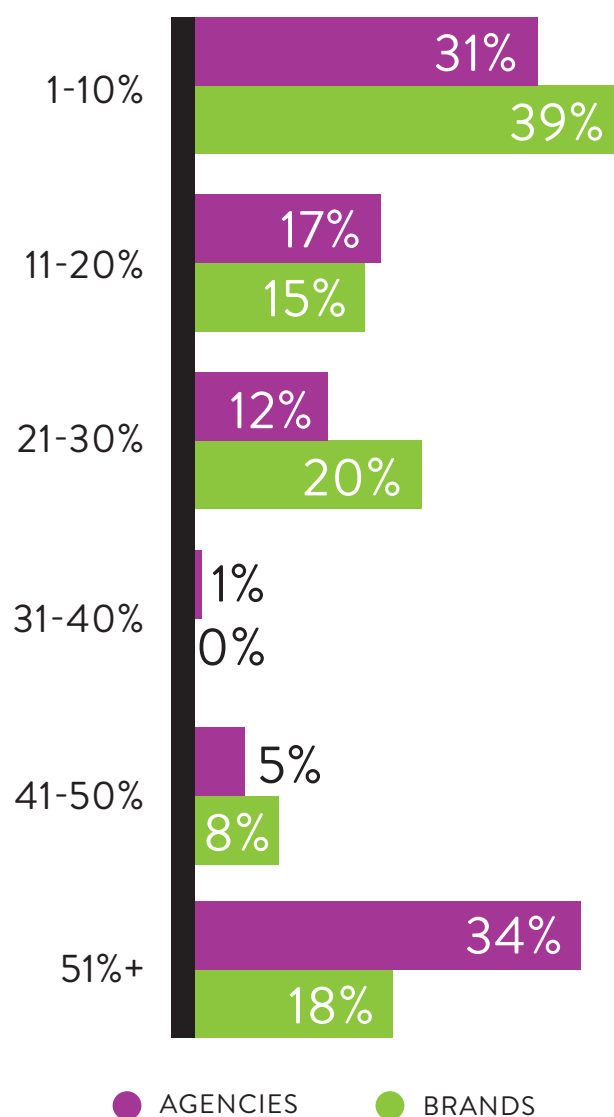
Mobile devices have come a long way since their heavy, brick-like predecessors were first introduced in 1983. These devices are now much more than on-the-go telephones, morphing and growing into a companion that is always on and always with us. Smartphones now make up 70 percent of all mobile phones in the U.S., up from 18 percent just four years ago¹. We now spend so much time on our phones (34 hours monthly) that it has surpassed time spent on our computers (27 hours monthly)².

Brand marketers are starting to experiment with mobile in their advertising campaigns to stay in front of consumers. Eighty-eight percent of the advertisers and 90 percent of the agencies we surveyed told us they had bought some form of mobile advertising in the past 12 months.

When compared with online and TV, mobile advertising is a young medium and still relatively new to most marketers. The majority of advertisers surveyed (82%) had three years or less experience with mobile, with 21 percent "just getting started." Agencies were in a similar position, with 70 percent of respondents having three years or less experience with mobile.

This lack of experience is reflected in the fact that a large group of agencies and advertisers indicated that less than 1 in 10 of their 2013 campaigns included a mobile component. However, an equally sizable portion of respondents – obviously early adopters – indicated more than half of their campaigns included a mobile component (Fig 1).

FIG 1. PERCENTAGE OF 2013 CAMPAIGNS INCLUDING A MOBILE COMPONENT

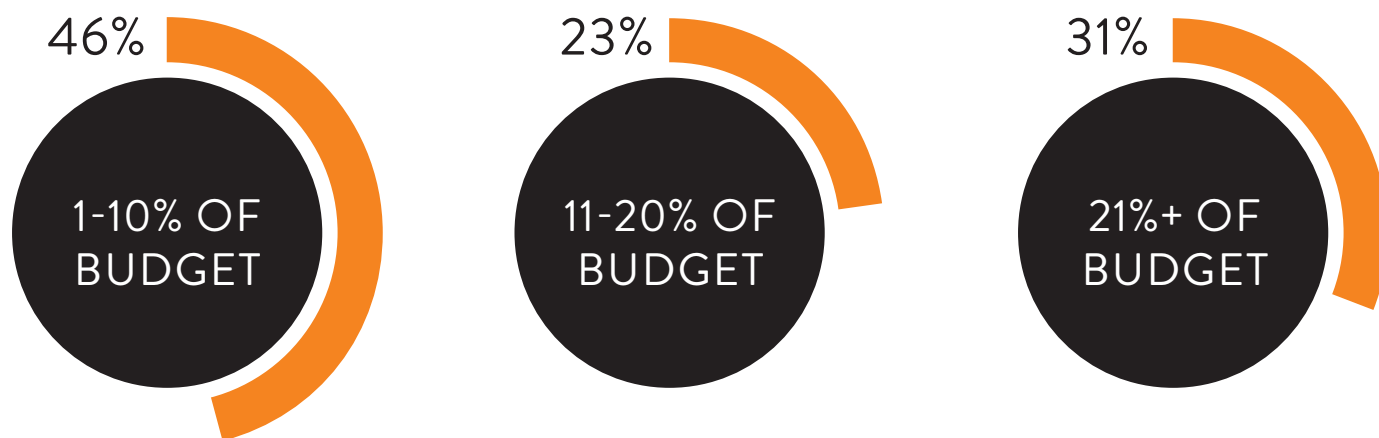


¹Source: Nielsen US Mobile Device Insights Q1 2014

²Source: Nielsen Digital Consumer Report Q1 2014

When it comes to budget, almost half of the advertisers surveyed said that they allocated less than 10 percent of their 2013 digital advertising budget to mobile advertising (Fig 2), indicating most advertisers are still testing the mobile waters. A small vanguard of advertisers committed more substantial amounts of budget to mobile, with 3 in 10 advertisers surveyed indicating that they allocated more than 20 percent of their 2013 budgets to mobile advertising.

FIG 2. ADVERTISERS: 2013 DIGITAL BUDGETS DEDICATED TO MOBILE



MOBILE GROWS AS BRANDING MEDIUM

Asked, "What is the primary purpose of your mobile advertising campaigns?" nearly half of all advertisers replied, "branding," with objectives such as driving awareness or influencing brand opinions. Unlike online advertising, which for decades remained the domain of direct response advertisers before it started being used as a branding platform, mobile has attracted brand advertisers relatively early on.

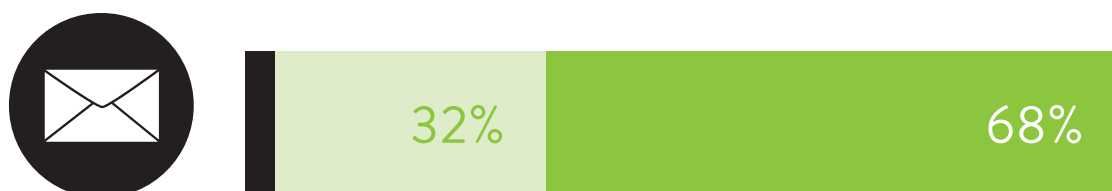
Given how quickly the mobile device has become a part of our everyday lives, brand marketers are keen to understand how they can use this medium to connect with their desired audiences and influence their brand opinions. As a result, advertisers indicate that mobile spending on branding-related objectives will grow faster than direct response (Fig 3). More than 1 in five advertisers say their 2014 mobile brand spending will grow by more than 20 percent. None of the advertisers surveyed indicated they would be decreasing their mobile advertising spend in the coming year.

FIG 3. ADVERTISERS' OUTLOOK FOR 2014 MOBILE ADVERTISING BUDGETS

BRANDING



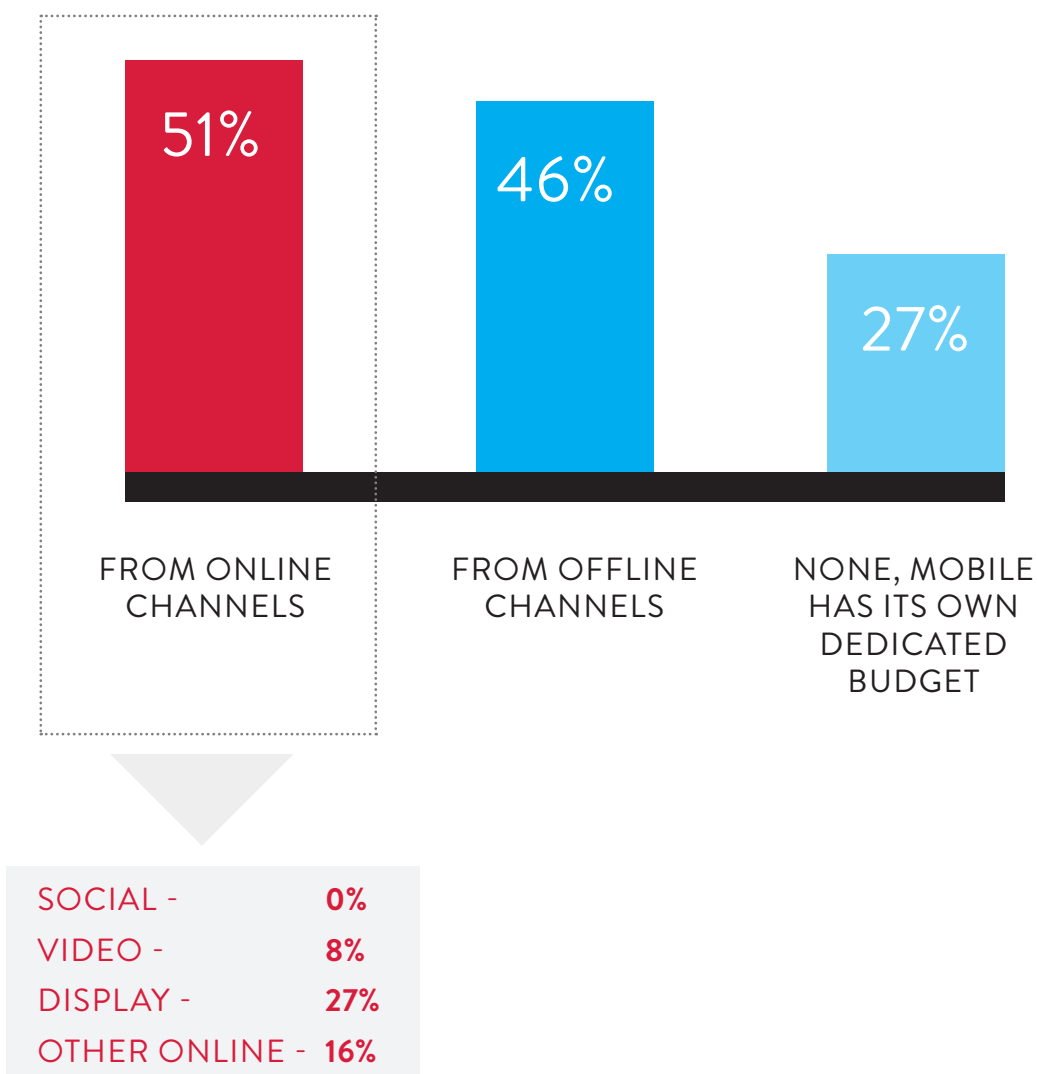
DIRECT RESPONSE



● STAY THE SAME ● GROW

Where are the dollars coming from to fund these mobile branding campaigns? Only 27 percent of marketers surveyed say that “mobile has its own dedicated budget” (Fig 4), indicating that there is enough focus and attention on mobile advertising within those organizations to merit earmarking dollars specifically for that purpose. Most of the advertisers we surveyed say their mobile advertising spend would be increasing at the expense of other media, underscoring advertisers’ experimental approach to mobile.

FIG 4. ADVERTISERS: WHERE DOLLARS FOR MOBILE ADVERTISING ARE COMING FROM



AD FORMATS, CHANNELS, AND PLATFORMS

When it comes to where marketers are advertising, advertisers and agencies are more or less evenly splitting their attention between advertising on the mobile web and in mobile apps across smartphones and tablets (Fig. 5). Three-quarters of marketers also indicate that they use mobile ad networks, showing that the most popular way to advertise on mobile is through a third party to quickly and easily achieve reach.

When it comes to mobile ad formats, advertisers and agencies are sticking to the tried and true tactics from their online campaigns for both tablet and smartphone platforms. Mobile display and video, for example, are the two leading choices for both mobile web and mobile in-app advertising (Fig 6). Mobile-specific features such as mobile text advertising and click-to-call are still relatively new to marketers and thus used lightly.

FIG 5. MOBILE MEDIUMS ADVERTISERS HAVE USED OR PLAN TO USE

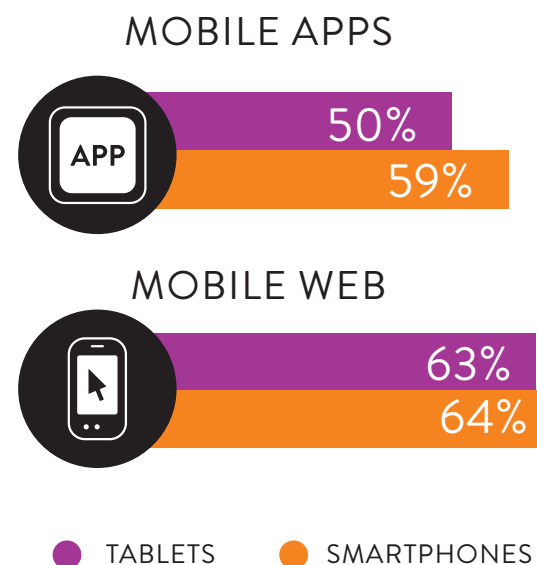
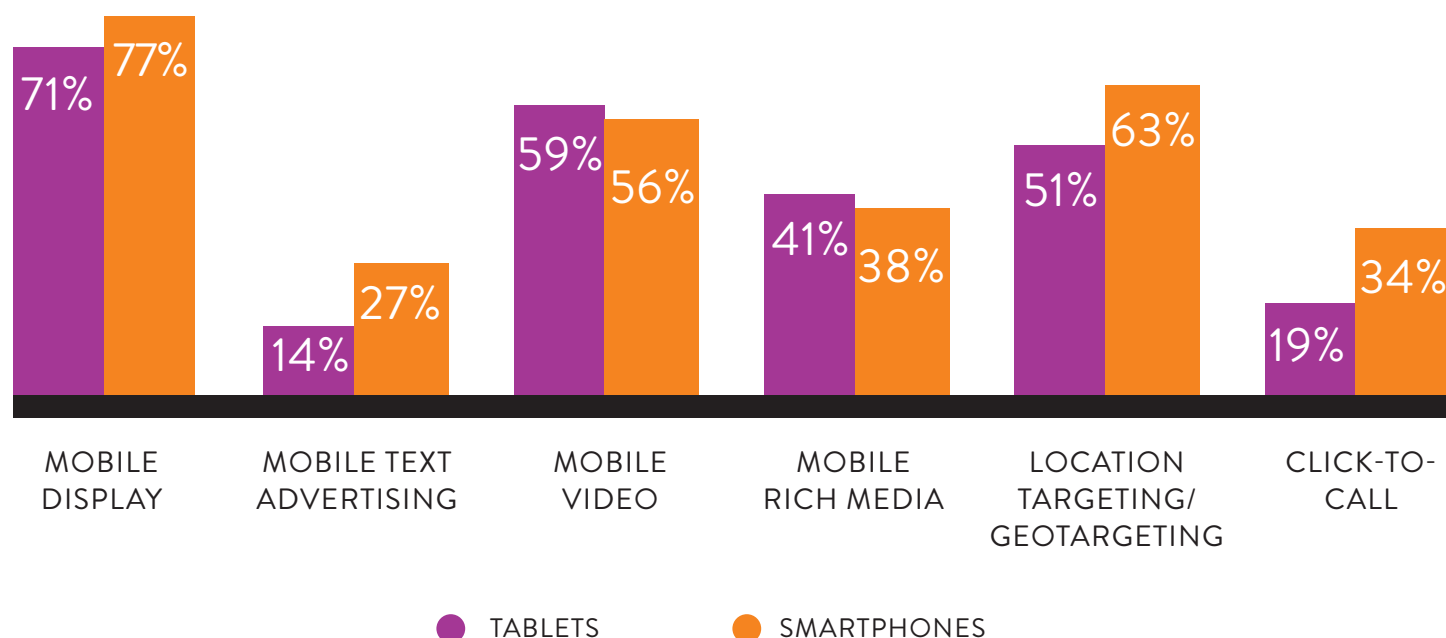


FIG 6. MOBILE FORMATS ADVERTISERS HAVE USED OR PLAN TO USE



The majority of brands and agencies plan to allocate their advertising to iOS and Android tablets and smartphones (Fig 7, Fig 8). These two platforms have the highest market share among consumers – a combined 93 percent of smartphone owners and 80 percent of tablet owners³.

FIG 7. TABLET ADVERTISING VS. CONSUMER MARKET SHARE

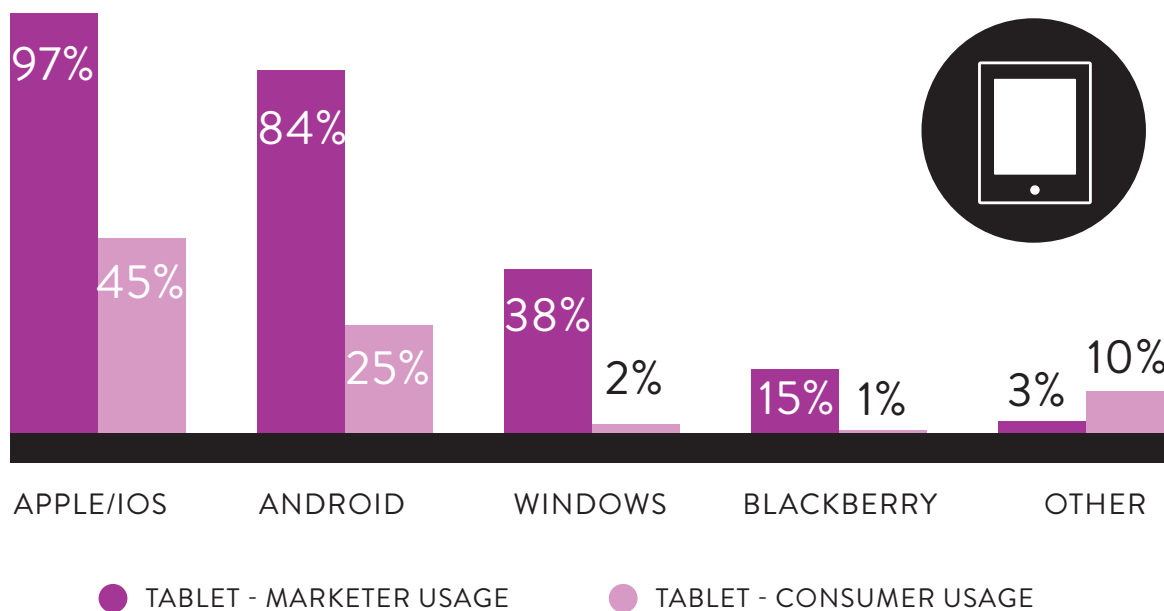
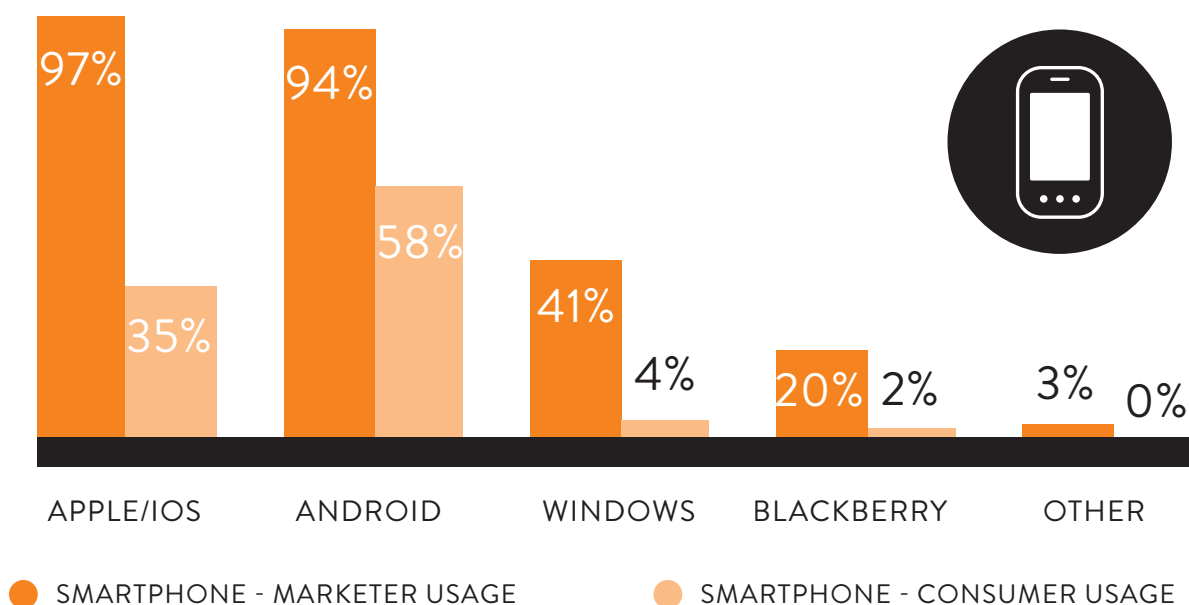


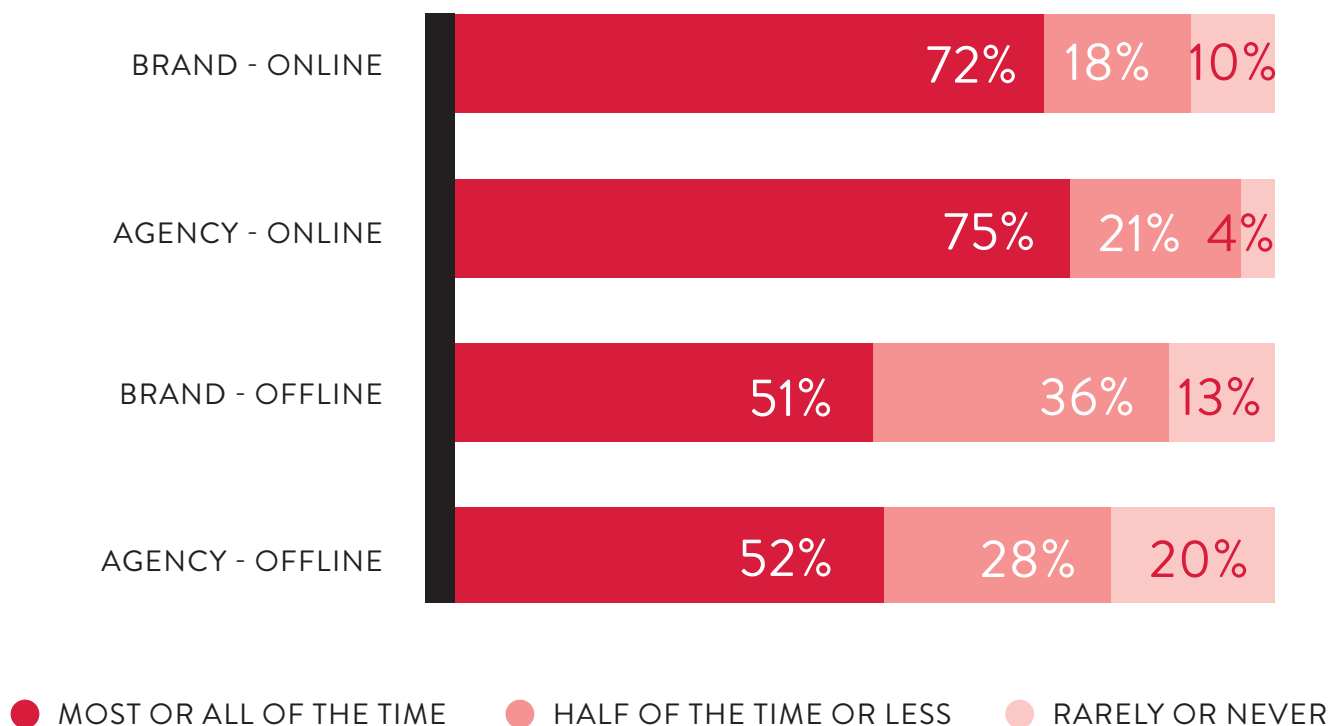
FIG 8. SMARTPHONE ADVERTISING VS. CONSUMER MARKET SHARE



³Source: Nielsen Mobile Device Insights, U.S., Q2, 2013

Marketers are deploying mobile campaigns not just on their own, but also as a complement to other media. Most mobile advertising is run in conjunction with other online and offline advertising. Only a small percentage of respondents said they rarely or never run mobile with anything else, indicating a low incidence of mobile-only campaigns.

FIG 9. ADVERTISERS: HOW OFTEN MOBILE ADVERTISING IS RUN IN CONJUNCTION WITH OTHER TACTICS



For brand advertisers, the preferred online advertising pairings with mobile are display (90%), social (67%) and video (59%). Agencies most often pair mobile with display (83%), video (75%) and rich media (70%). Among offline media, brands prefer to run mobile ads alongside TV (41%), radio (31%) and print (28%), while agencies most often use print (50%), TV (45%) and radio (43%).

This shows that mobile advertising is often viewed as an integrated part of the marketer's toolkit, and runs as part of multi-platform campaigns. Mobile is not a medium in a vacuum, but one of many tactics that marketers use to influence branding-focused objectives.

CHALLENGES FOR MOBILE ADVERTISERS

Ironically, it's this pairing of mobile with other mediums and focus on branding that gives rise to advertisers' biggest mobile pain points. Advertisers say their two biggest obstacles to further mobile growth are calculating mobile return on investment (ROI) and lack of relevant success metrics for their mobile campaigns (Fig 10).

FIG 10. ADVERTISERS' TOP MOBILE BRAND ADVERTISING PAIN POINTS

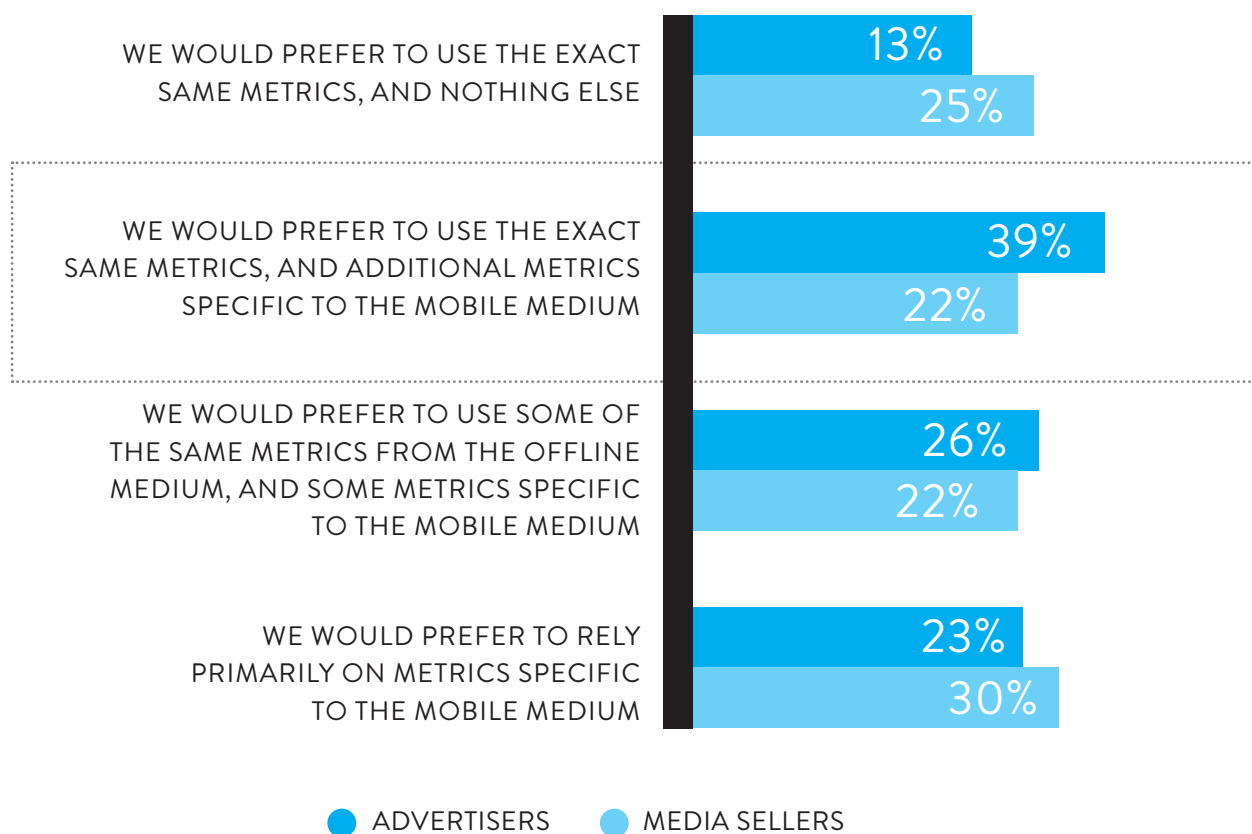


When asked what type of metrics advertisers would like to use, the most common response (given by 39%) is "the exact same metrics as offline, and additional metrics specific to the mobile medium" to ensure they are measuring and optimizing mobile activity consistently with their other initiatives (Fig 11).

Since marketers are running mobile increasingly with both online and offline tactics, it is not surprising that they also seek metrics that can span both platforms. The increasing focus on brand objectives makes this especially true, as relevant brand metrics are much more common in the offline medium than the digital medium. However, advertisers also recognize there is a unique aspect of the mobile medium that does not exist offline that they can use to their advantage – for example, the opportunity to granularly measure audience reach or to validate the effectiveness of the campaign directly against the campaign audience. Only 23 percent responded that they'd like to "primarily rely on metrics specific to the mobile medium," indicative of the low incidence of mobile-only campaigns.

Unfortunately only 22 percent of media sellers can provide the offline and mobile metrics that advertisers are looking for. There is clearly a disconnect in the metrics desired by advertisers and provided by media sellers, opening up a huge opportunity for media sellers who are able bridge this gap.

FIG 11. METRICS ADVERTISERS WOULD LIKE TO USE VS. METRICS PUBLISHERS PROVIDE



RELEVANT METRICS COULD ACCELERATE GROWTH

Addressing this disconnect could pay large dividends: 30 percent of advertisers and 37 percent of agencies say that the “ability to use the same metrics to evaluate audience reach on mobile as are used offline” would lead them to increase their use of mobile advertising.

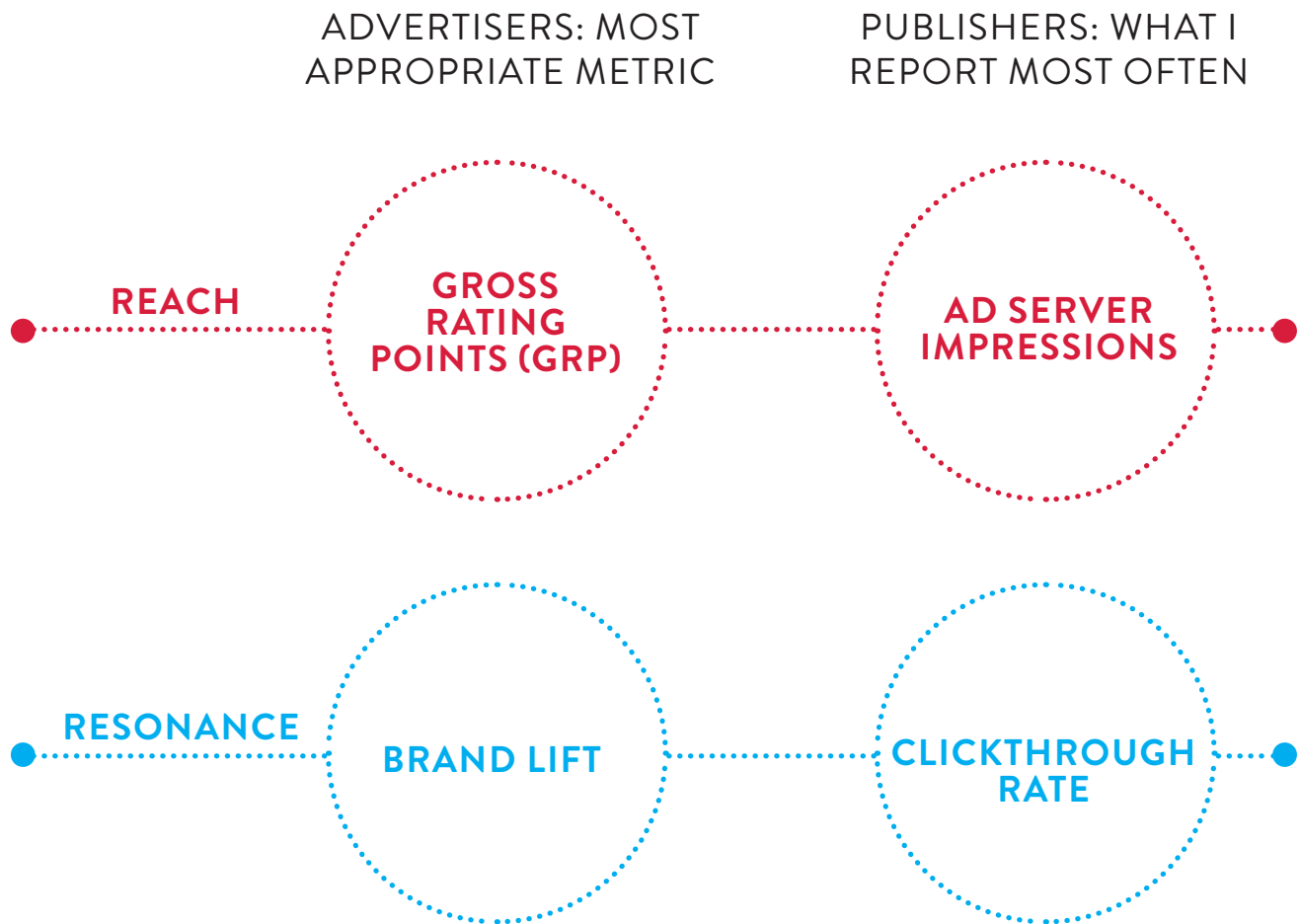
As a best practice, media sellers should offer the relevant metrics advertisers are looking for. According to advertisers, the most appropriate metric to measure a mobile brand advertising campaign’s reach is gross rating points (GRP) (Fig 12). GRPs have long been the standard metric used to demonstrate audience reach in the TV medium, which further illustrates advertiser desire for offline metrics for the mobile medium. However, media sellers most often report the campaign impressions from the ad server, which primarily measures what was delivered as opposed to the audience it was delivered to.

The confusion over metrics is even more pronounced when it comes to measuring mobile ROI. Publishers most often measure the ROI of mobile brand advertising campaigns using clickthrough rates (Fig 12). When asked which is the most appropriate metric for measuring mobile brand advertising ROI, advertisers and agencies both respond the number one metric is brand lift. Publishers are able to offer a mobile-only measure of what was delivered, while agencies and advertisers are looking for an offline-equivalent metric for campaign effectiveness.

GRP: STANDS FOR GROSS RATING POINTS, WHICH IS THE PERCENTAGE OF THE AUDIENCE REACHED BY AN AD MULTIPLIED BY THE FREQUENCY WITH WHICH THEY SEE IT IN A GIVEN CAMPAIGN. THIS METRIC IS USED TO MEASURE THE SIZE OF AN AUDIENCE REACHED BY AN AD OR PROGRAM.

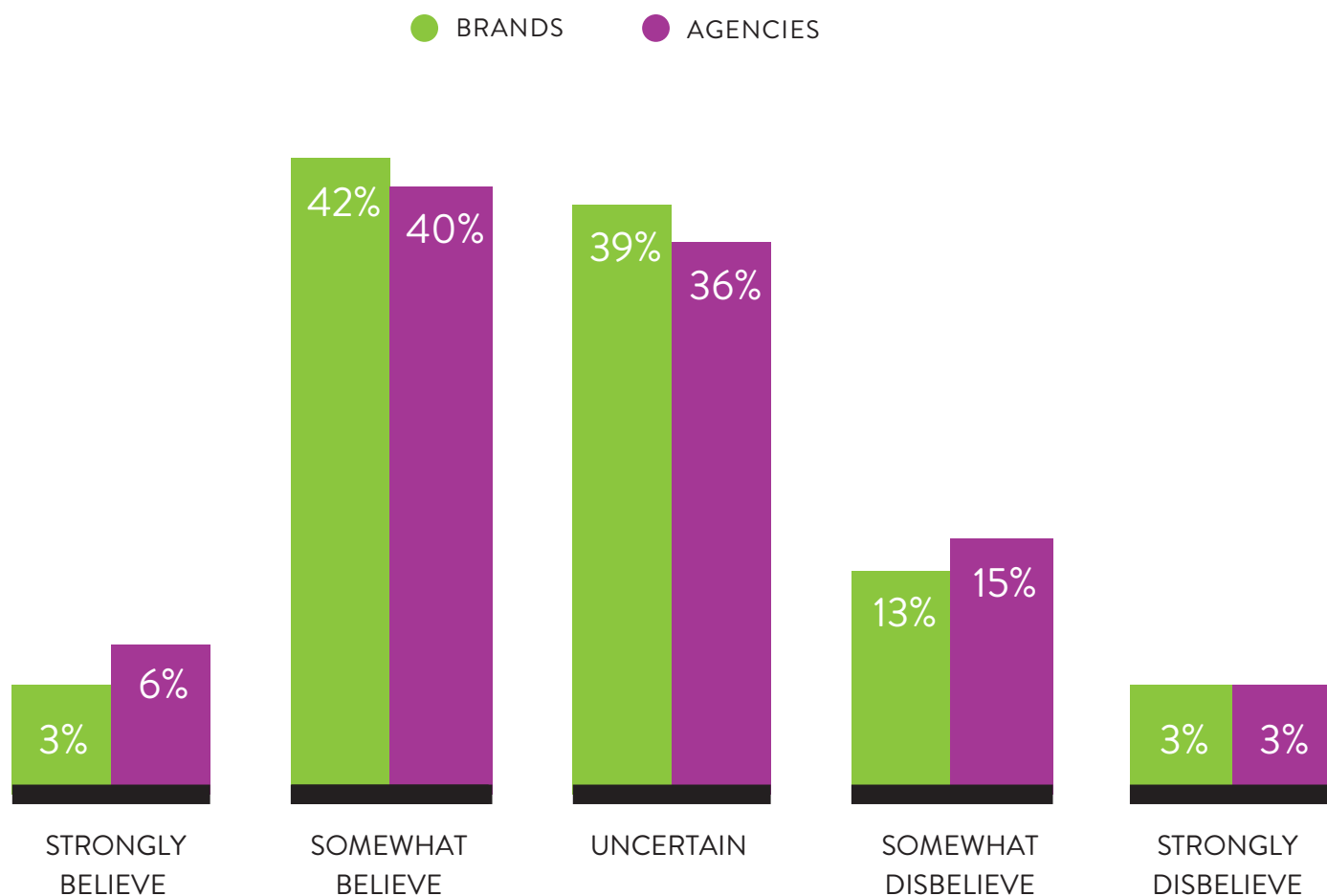
BRAND LIFT: THE PERCENTAGE INCREASE IN THE PRIMARY MARKETING OBJECTIVE OF A BRAND ADVERTISING CAMPAIGN, MOST OFTEN DEFINED IN TERMS OF THE CLASSIC PURCHASE FUNNEL – LIFT IN AWARENESS, ATTITUDES, FAVORABILITY, PURCHASE INTENT, OR PREFERENCE.

**FIG 12. ADVERTISERS' MOST APPROPRIATE METRIC VS.
METRIC PUBLISHERS REPORT MOST OFTEN**



This absence of relevant reach metrics leaves both brand advertisers and agencies in serious doubt of mobile networks and publishers' audience claims. Only three percent of advertisers and six percent of agencies "strongly believe" claims to be able to reach a specific mobile audience (Fig 13). The majority of advertisers (55%) and agencies (54%) surveyed are uncertain or outright disbelieve audience reach claims, potentially hampering future growth of the medium. Media sellers' verification of such claims with the right metrics could go a long way in easing concerns and capturing mobile spend. Sixty percent of advertisers and 69 percent of agencies said that the "ability to verify that my mobile advertising was actually delivered to the intended audience" would lead them to increase their use of mobile advertising.

FIG 13. MEDIA BUYER VIEWS OF MOBILE AUDIENCE REACH CLAIMS



The confusion over appropriate ROI metrics has a significant impact on advertiser attitudes towards mobile brand advertising effectiveness. More than half of brand advertisers think that mobile “moves the needle when combined with other efforts, but I’m not sure how to measure reach or ROI” (Fig 14), while three percent of advertisers flat out said “I don’t think [mobile] works.”

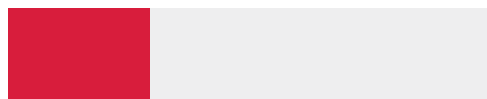
FIG 14. ADVERTISER VIEWS ON MOBILE BRAND ADVERTISING EFFECTIVENESS

52%



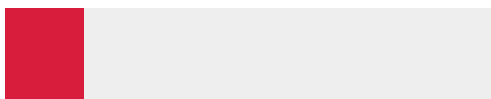
I think it moves the needle when combined with other efforts, but I’m not sure how to measure reach or ROI

29%



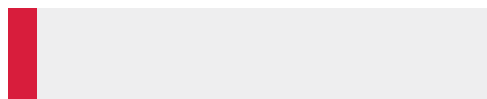
It’s a promising new tactic, but it’s effectiveness in reaching my audience and achieving my branding-related objective is

16%



It effectively reaches my audience and produces a measurable ROI for my branding-related objective (with ROI defined as metric achieved per dollar spent)

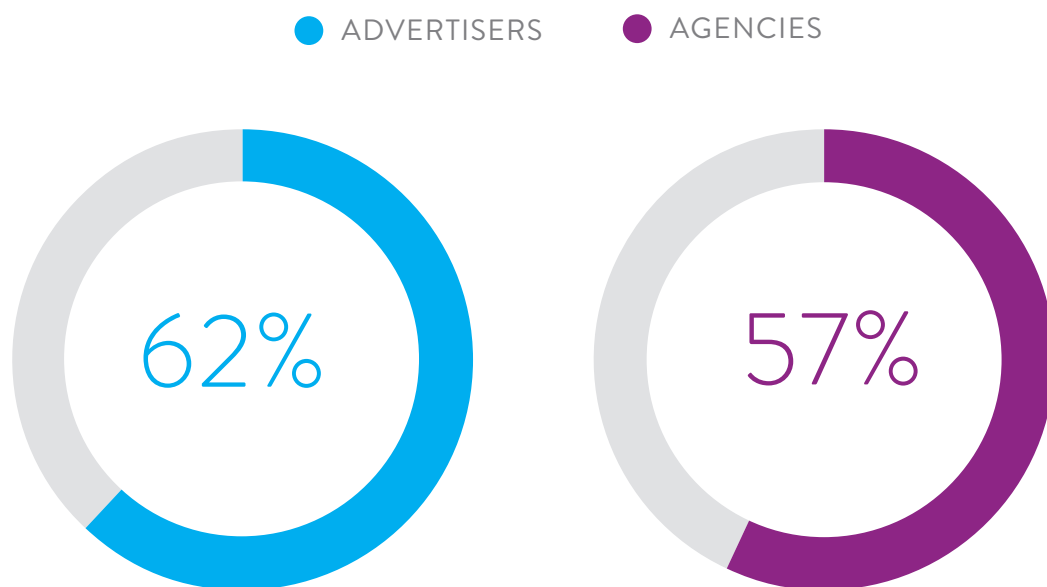
3%



I don’t think it works

There is a great opportunity to dispel a lot of this confusion and grow the mobile medium by all parties involved with a campaign—advertiser, agency and media plan participants—using relevant brand lift metrics to calculate mobile ROI. Reflecting that this is their biggest mobile pain point, 62 percent of advertisers and 57 percent of agencies say the “ability to verify that brand advertising created the desired result (e.g. increased brand awareness)” will lead them to increase their use of mobile advertising (Fig 15). Media sellers need to provide the metric advertisers are looking for – brand lift. Those who do will have the upper hand in capturing dollars from those advertisers on the fence about whether mobile ads achieve their desired end.

FIG 15. ABILITY TO VERIFY THAT BRAND ADVERTISING CREATED THE DESIRED RESULT WILL LEAD TO INCREASED MOBILE ADVERTISING USE

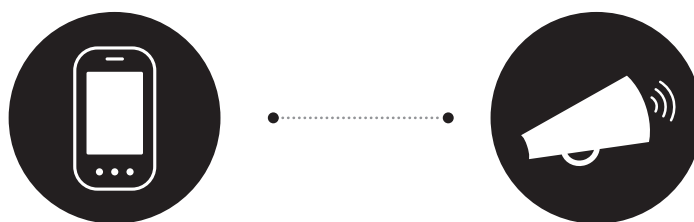


OTHER MOBILE BRAND ADVERTISING BEST PRACTICES

In addition to addressing the confusion over mobile metrics, this study also identified other gaps between the expectations of brand marketers and their partners in the mobile media ecosystem, and resulting best practices. If these best practices are employed, it could materially improve the mobile brand advertising outlook.

THE NEED: CAMPAIGN GOAL COMMUNICATION

There is a clear opportunity for increased collaboration between mobile media buyers and sellers. Nearly all advertisers said that defining the campaign's audience and advertising objective, and establishing an appropriate success metric among everyone involved in the campaign before the campaign starts were "very important" or "somewhat important" for a successful mobile campaign (Fig 16). However, the media sellers surveyed indicated that these communications were actually happening less than half of the time, illustrating a big disconnect between what should be happening versus what is actually happening.

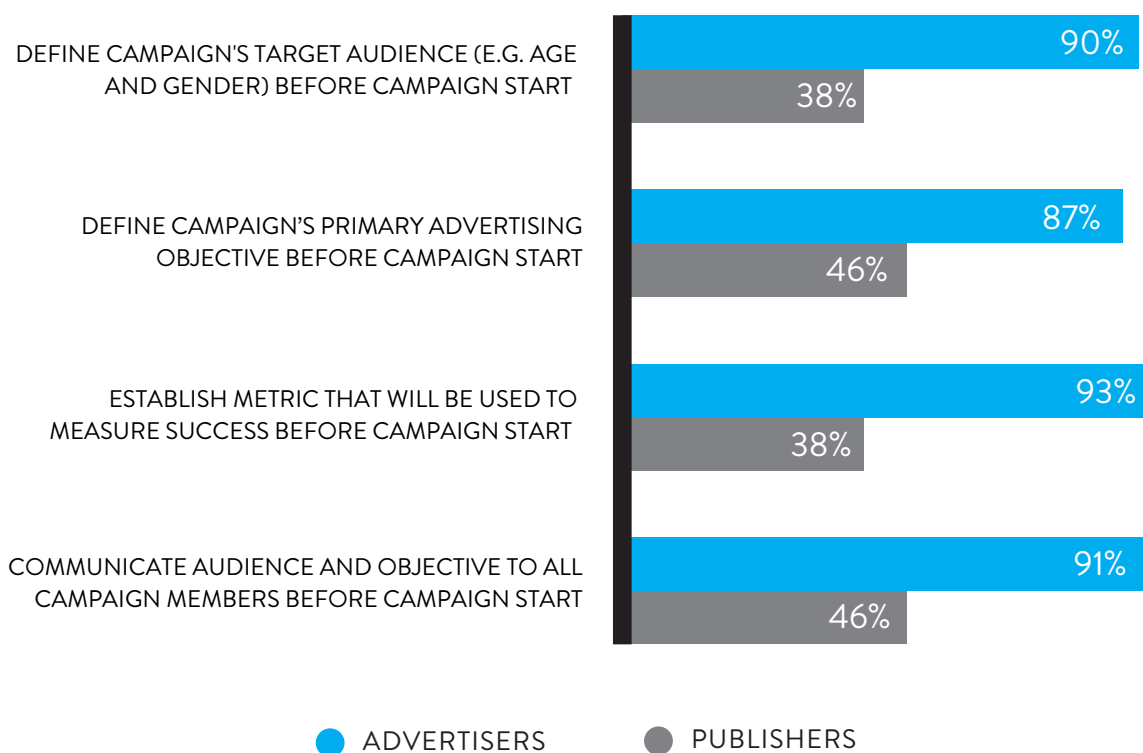


BEST PRACTICE: ALIGN ALL CAMPAIGN MEMBERS ON CAMPAIGN GOALS

It is critical that everyone involved with a campaign be on the same page regarding campaign goals: the intended campaign audience, the primary marketing objective and the metrics for success. Agencies and publishers must spearhead these conversations with brand marketers to clearly establish campaign goals and appropriate success metrics before the campaign starts. Brand marketers must also take on the responsibility of proactively and clearly defining the primary audiences and goals for their mobile campaigns.

In our opinion, the easiest way to accomplish this is to invest in systems that allow everyone involved in the campaign to view and directly collaborate around the campaign's performance against the desired audience and primary marketing objective. In the best possible world, everyone would log into the same system to monitor, evaluate and optimize the mobile advertising investment. These systems would help increase campaign performance and ROI, and the ability to offer such collaboration likely would attract more brand dollars.

FIG 16. WHAT ADVERTISERS SAY IS IMPORTANT FOR A SUCCESSFUL CAMPAIGN VS. WHAT PUBLISHERS SAY ACTUALLY HAPPENS FOR EVERY CAMPAIGN



THE NEED: IN-FLIGHT IMPROVEMENTS

The vast majority (84%) of advertisers rank “monitoring campaigns for in-flight improvements” as important for a successful mobile campaign; 68 percent say it is very important (Fig 17). Agencies echoed this sentiment, with 76 percent saying “collaborating with media plan participants for in-flight optimization” is important for a successful campaign. This indicates that not only is optimization important, agencies expect media partner involvement in the process. However, only a small fraction of publishers are regularly optimizing on the metrics that advertisers and agencies have deemed appropriate.

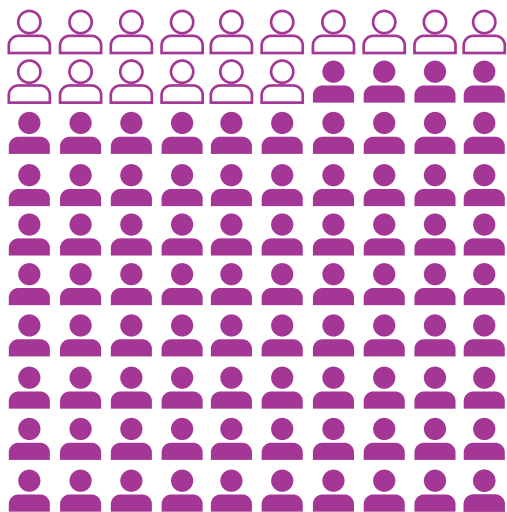
BEST PRACTICE: OPTIMIZE PERFORMANCE IN-FLIGHT USING REAL-TIME DATA

Real-time metrics are essential to optimizing brand campaigns while they are in market. Regular measurement and optimization by agencies and media sellers will help ensure that campaigns are consistently reaching and resonating with the right audience, thereby maximizing mobile advertising ROI. Armed with the necessary real-time data and process for consistent success, media sellers can use this to confidently offer and fulfill guarantees for audience delivery or brand performance. Roughly one-third of advertisers say audience and brand performance guarantees would lead them to increase their use of mobile advertising. In order to make in-flight improvements, whether to increase performance or to meet guarantees, brand marketers, agencies and media sellers all need to ensure they are getting the right metrics in real-time. Post-campaign reports are not enough for this fast-paced medium.

FIG 17. ADVERTISER VS. PUBLISHER OPTIMIZATION ATTITUDES AND PRACTICES

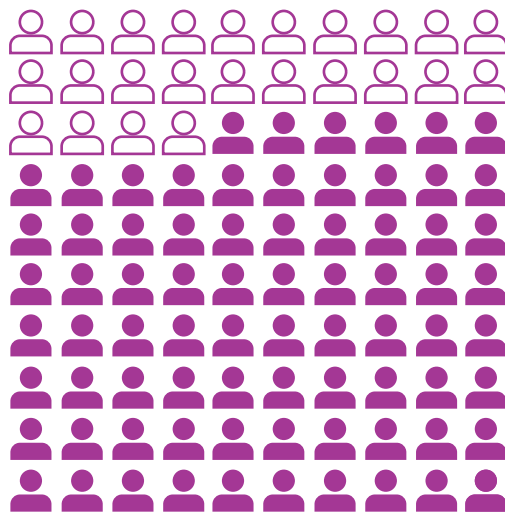
84%

BRANDS: MONITORING
CAMPAIGNS FOR IN-FLIGHT
IMPROVEMENTS IS IMPORTANT



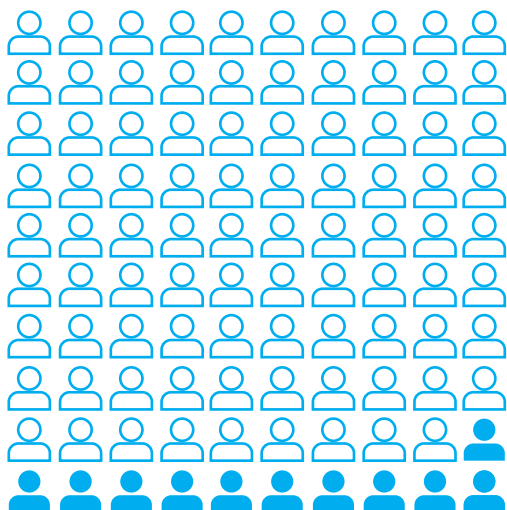
76%

AGENCIES: COLLABORATING WITH MEDIA PLAN
PARTICIPANTS TO OPTIMIZE PERFORMANCE
DURING CAMPAIGN IS IMPORTANT



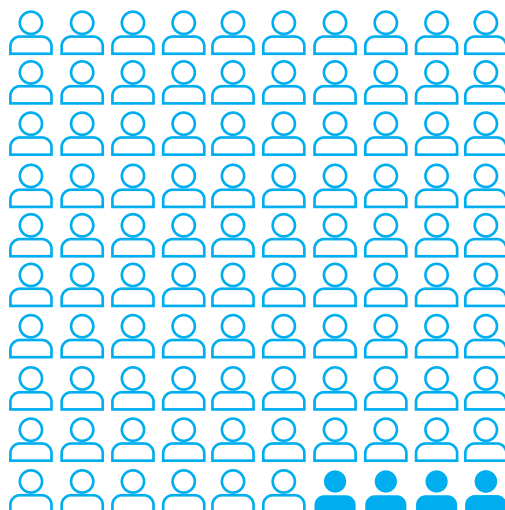
11%

PUBLISHERS: ACTUALLY OPTIMIZE
MOST CAMPAIGNS AGAINST AGE
AND GENDER WHILE IN-FLIGHT



4%

PUBLISHERS: ACTUALLY OPTIMIZE MOST
CAMPAIGNS AGAINST BRAND LIFT WHILE
IN-FLIGHT



THE NEED: REACH AND ROI MEASUREMENT

Seventy percent of advertisers and 47 percent of agencies say the “ability to measure audience and ROI at the same time” would increase their use of mobile advertising, while half of publishers say it would increase their mobile sales (Fig 18). Using the same system to obtain this information could save time and reduce errors due to implementation complexity. Unfortunately, very few companies measure the two. Ten percent of agencies and 11 percent of publishers say that no one monitors the reach or ROI of their mobile brand advertising campaigns.

BEST PRACTICE: MEASURE REACH AND ROI AT THE SAME TIME

The recipe for marketing effectiveness is relatively simple, and the same across all screens. For a campaign to be effective, marketers must reach the right person and influence their opinion. Reach and ROI information is critical for improving advertising effectiveness. Marketers, agencies, and publishers should adopt solutions, ideally a single platform using a single tag, that allows them to easily evaluate campaign reach and ROI using relevant GRP and brand lift metrics.

FIG 18. MEASURING REACH AND ROI AT THE SAME TIME



70%

Brands: Ability to measure audience reach and ROI at the same time would increase my use of mobile advertising

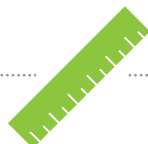


50%

Publishers: Ability to measure audience reach and ROI at the same time would increase sales

10%

Agencies: No one measures reach



10%

Agencies: No one measures ROI

THE NEED: ROI CALCULATION

Nearly all (97%) of advertisers say it is important to calculate ROI at the end of every campaign, and brands rank brand lift as the most appropriate metric with which to calculate ROI (Fig 19). Unfortunately, only one-third of agencies and publishers are actually calculating ROI at the end of every campaign. This is not surprising given the metrics that publishers use to calculate ROI are oftentimes more suited to direct response objectives and are not the brand lift metrics that advertisers and agencies are looking for. This may also explain why more than half of brand advertisers think that mobile “moves the needle when combined with other efforts, but I’m not sure how to measure reach or ROI.”

BEST PRACTICE: USE RELEVANT METRICS TO CALCULATE ROI FOR EVERY CAMPAIGN

Brand relevant metrics are key to accurately assessing performance and clarifying actual ROI for branding-related campaigns. Other metrics are relevant only in that they positively correlate with brand lift, but do not directly measure brand performance. Direct response metrics, such as clickthrough rates, are not relevant for assessing brand performance, and may be misleading.

Fortunately, the tools for measuring brand lift already exist and can be easily deployed for every mobile brand advertising campaign. This allows agencies and publishers to calculate ROI using relevant metrics at the end of every campaign and prove their ability to execute effective mobile brand advertising campaigns.

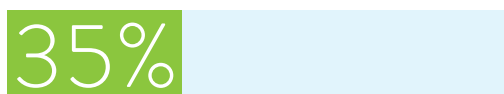
FIG 19. ADVERTISER ATTITUDES TO ROI CALCULATION VS. ACTUAL PRACTICE



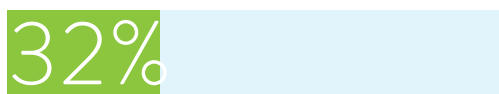
Brands: Calculating ROI at end of campaign is important



Brands: Improved clarity around actual return on brand advertising investment will increase my use of mobile advertising



Agencies: Actually calculate ROI at end of every campaign



Publishers: Actually calculate ROI at end of every campaign

THE NEED: PERFORMANCE CONTEXT

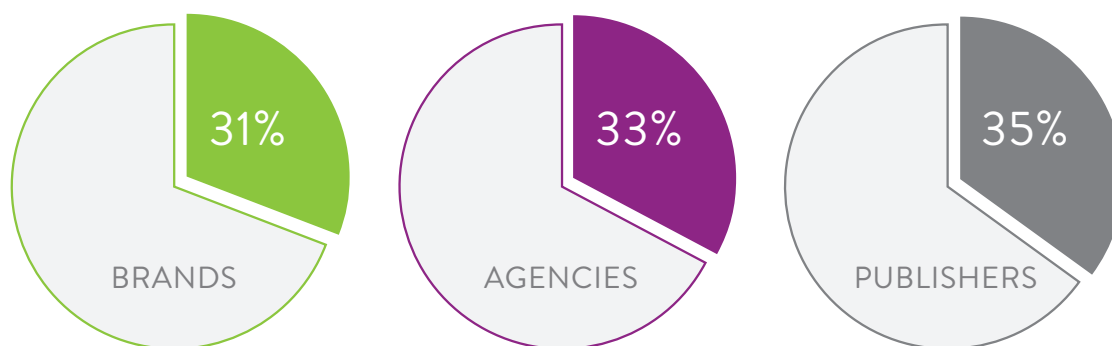
In addition to clarity around how the campaign is performing, marketers would also like context for their ad performance as compared with the rest of the industry. Over one-third of all brands, agencies and publishers said one of their biggest mobile pain points is a lack of mobile benchmarks (Fig 20).

Currently, advertisers receive benchmarks from a variety of sources, ranging from internal benchmarks they keep themselves to benchmarks from their agencies, vendors and industry organizations. However, 10 percent of advertisers say they have no benchmarks for reach, and 13 percent say they have no benchmarks with which to evaluate ROI; leaving them in the dark as to what their performance means and how they compare to their peers.

BEST PRACTICE: DEVELOP MOBILE BENCHMARKS

Consistent measurement of every campaign is key to building internal mobile benchmarks. When evaluating partners to work with, or measurement tools to adopt, media sellers and buyers should look for the ability to compare their campaign to industry norms or, even better, to internal, client-specific benchmarks that they maintain.

FIG 20. IDENTIFIED LACK OF MOBILE BENCHMARKS AS BIGGEST MOBILE PAIN POINT



CONCLUSION

The responses to this survey point to enthusiasm for the mobile space, but that enthusiasm is tempered by large gaps in how to appropriately show the effectiveness of the mobile medium. As mobile marketing matures, the need for relevant mobile metrics will only become more urgent.

Marketers are using mobile as an integrated tool alongside other tactics and mediums to achieve branding-related objectives. Agencies and media sellers need to ensure that they are offering metrics that are also brand-focused and can span multiple platforms. These metrics need to be offered consistently on every relevant campaign, and everyone involved with a campaign—advertiser, agency, and media plan participants—must be on the same page. In addition, they must be able to collaborate on improving campaign performance using these metrics. Only then will the mobile medium rise out of the metrics morass it is currently in.

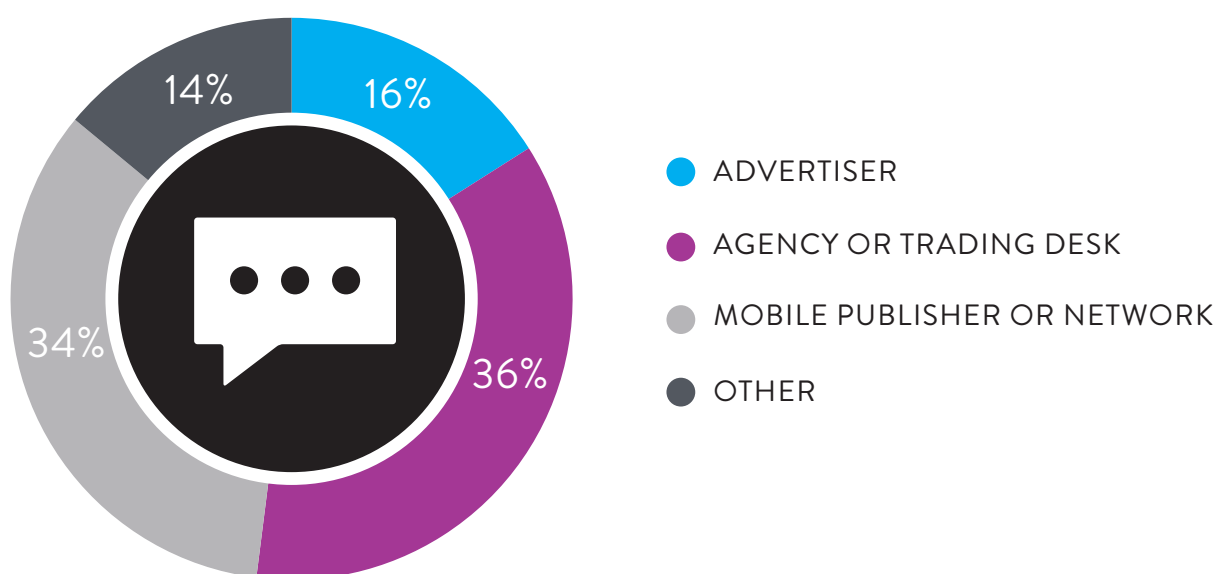
There are many other best practices that advertisers, agencies and media sellers can adopt to better work together to increase the effectiveness of the mobile marketing experience. This includes improving communication and collaboration amongst all members associated with a campaign, ensuring that the right reach and ROI information is captured, and taking action on data while the campaign is still in-market to improve performance. These actions will go a long way in addressing the current mobile pain points.

We have reached a tipping point in mobile brand advertising. The tools and solutions that can help address the confusion with mobile metrics are being developed or already exist. As mobile advertising grows, advertisers, agencies and media providers need to coalesce around these tools and solutions and start to work around a common currency of communication. By doing so, mobile marketers will begin to address the challenges highlighted in this study and help grow the medium to its full potential.

METHODOLOGY

A survey commissioned by Nielsen of U.S. digital marketing and media professionals was conducted by Digiday in October 2013 on current attitudes and approaches to mobile advertising. Participants were contacted via email and asked to self-identify as an advertiser, a mobile publisher or advertising network, an agency or trading desk, or “other” (Fig 21.). Respondents who identified with the first three categories were posed questions suited to their classification. Results were summarized and cross-tabbed to identify consistencies or inconsistencies in each classification’s viewpoints regarding current practices and intent for mobile advertising in 2014, and what developments might contribute to the growth of the medium. A synopsis of those results is presented in this whitepaper.

FIG 21. SURVEY RESPONDENTS BY CATEGORY



ABOUT DIGIDAY

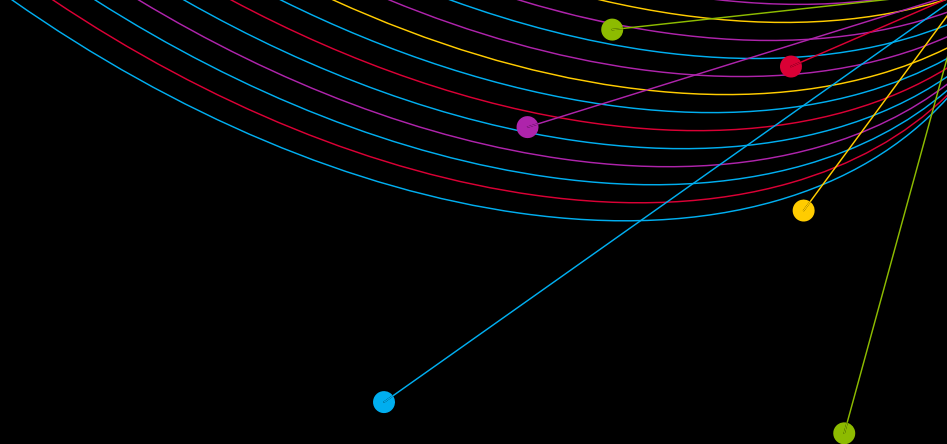
Digiday is a media company and community for professionals who work in the digital media, marketing, and advertising industry. Its mission is to connect that industry with insightful analysis and perspective, as well as each other. It provides key insights and unbiased information through its online publications and conferences that cover the changes and trends shaping digital media—and why they matter. Digiday's focus is on quality, not quantity, and honesty instead of spin. For more information, visit Digiday.com.

ABOUT NIELSEN

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

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