



2015 ANA Survey Report

Advertising is Going Native

Data Charts

Introduction and Methodology

- This report covers the findings from an online survey conducted by the ANA during fourth quarter 2014.
- In total, 127 client-side marketers are represented in this survey. Participants include members of the ANA Pulse Survey Community, ANA members, and prospects.
- Of those who responded, 57 percent are “senior marketers” (director level and above) and 43 percent are “junior marketers” (manager level and below).
- On average, respondents to this survey have 14 years of experience in marketing.

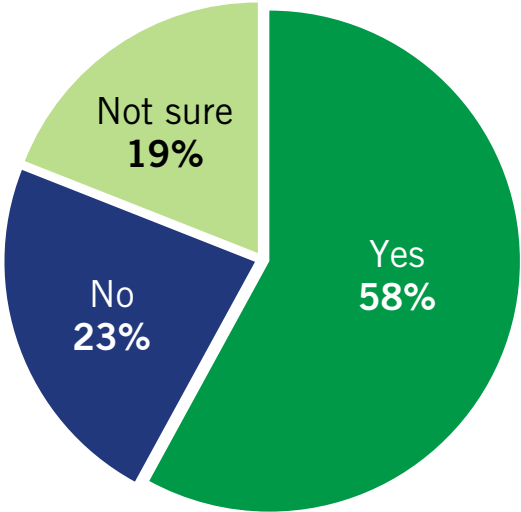
Note: Charts are based on the total number of respondents answering each question (excludes no answers).



Engagement in Native Advertising

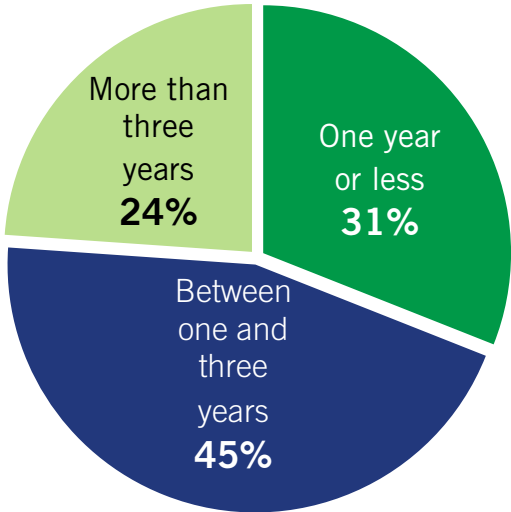
Base: 126

Engagement in Native Advertising in the Past Year



Base: 71

Number of Years Engaged in Native Advertising



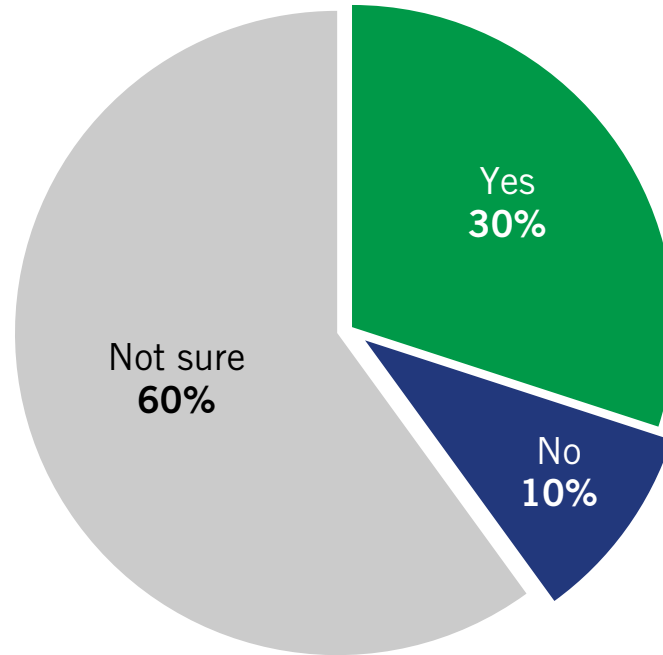
Q1A. Has your company engaged in native advertising over the past year?

Q1B. How long has your company been engaged in native advertising?



Will Company Initiate Native Advertising This Year

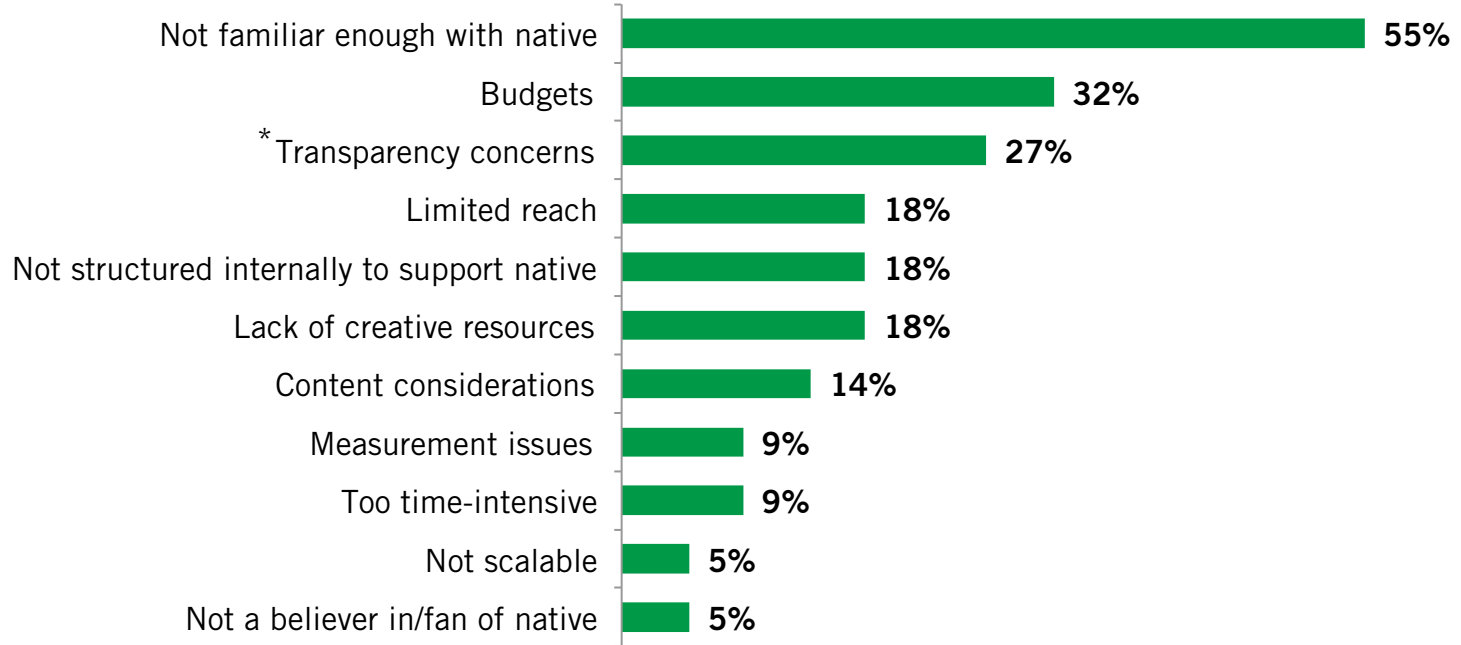
Base: 50



Q1C. Is your company looking to initiate native advertising in the next 12 months?

Barriers to Initiating Native Advertising

Base: 22



*i.e., concerns that paid relationship between brand and media is not sufficiently transparent to consumer

Q1D. Why is your company not looking to initiate native advertising in the next 12 months? Check all that apply.

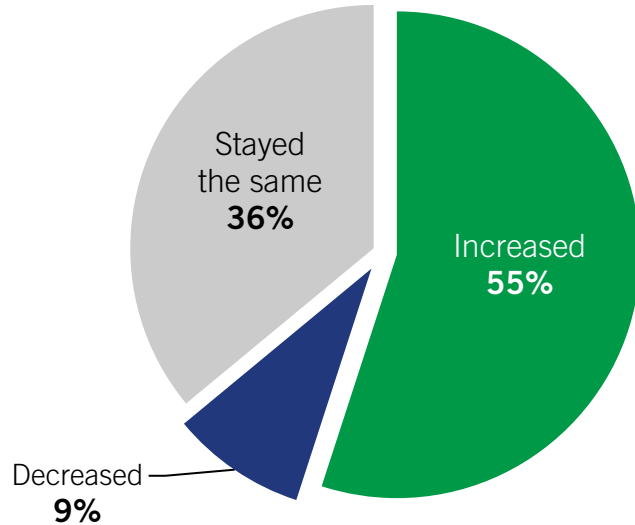


Budgets for Native Advertising

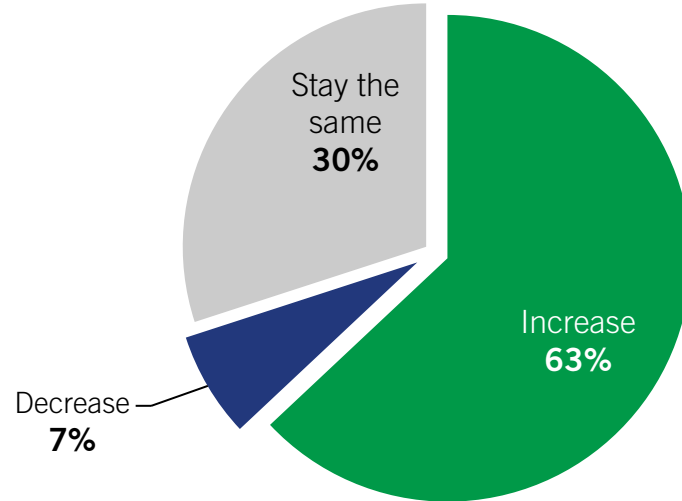
Base: 58

Base: 56

Past Year's Budget



Next Year's Budget

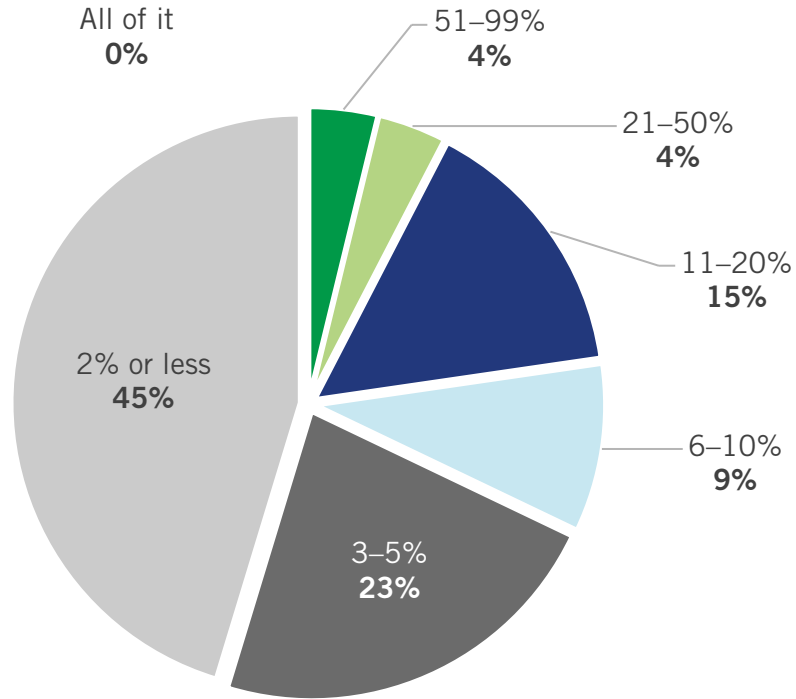


Q6. In the past year, has the budget you've allocated to native advertising increased, decreased, or stayed the same?

Q8. In the next year, do you expect your budget allocated to native advertising to increase, decrease, or stay the same?

Budget Allocation for Native Advertising

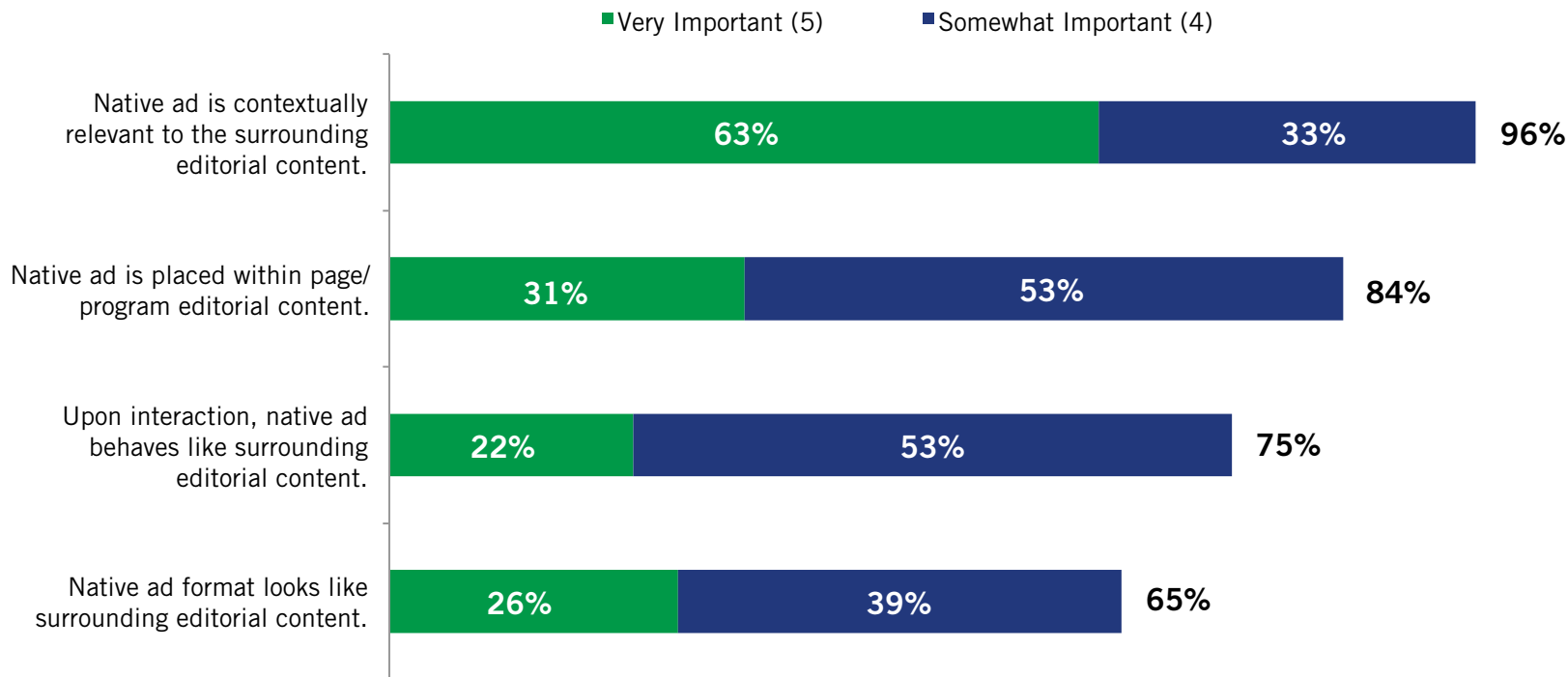
Base: 53



Q7. Approximately what percentage of your overall advertising budget (i.e., media and production) has been allocated to native advertising over the past year?

Importance of Components of Native Advertising

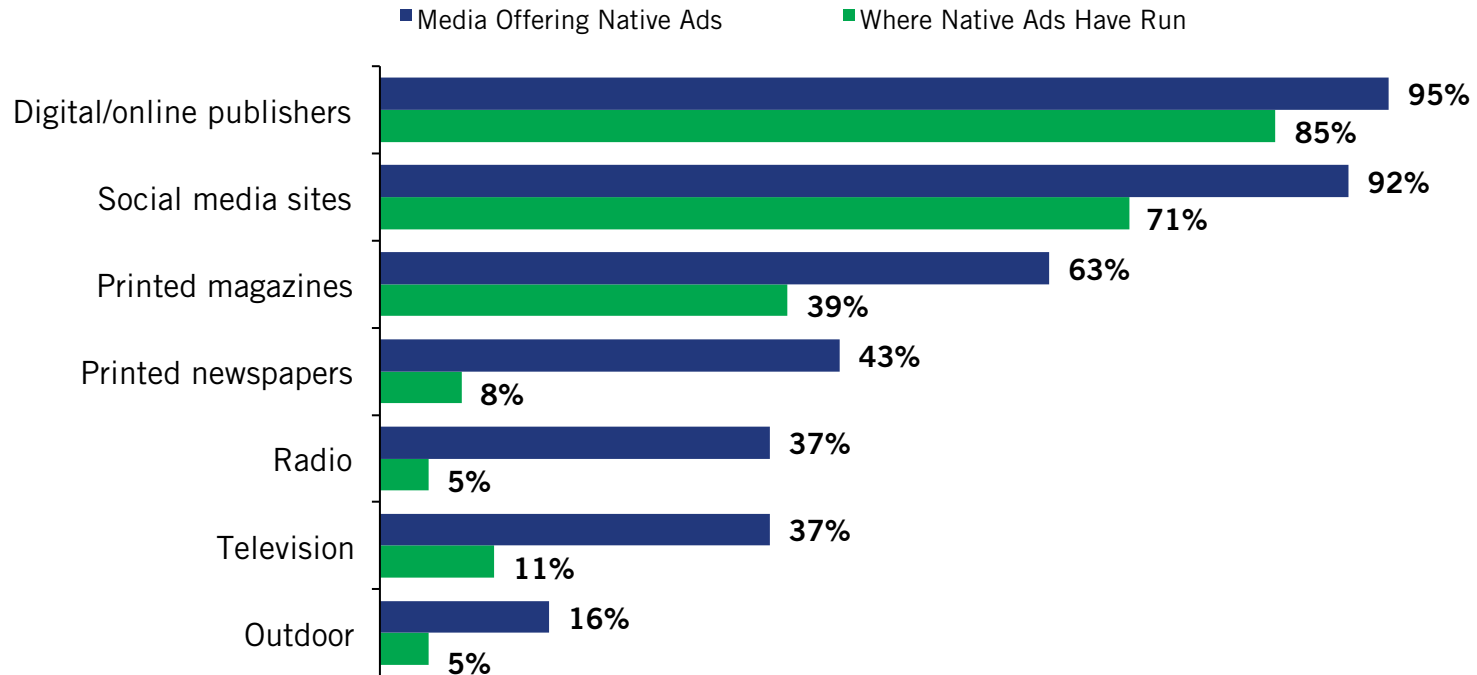
Base: 51



Q16. How important are each of the following components of native advertising?

Native Advertising Media

Base: 106/65



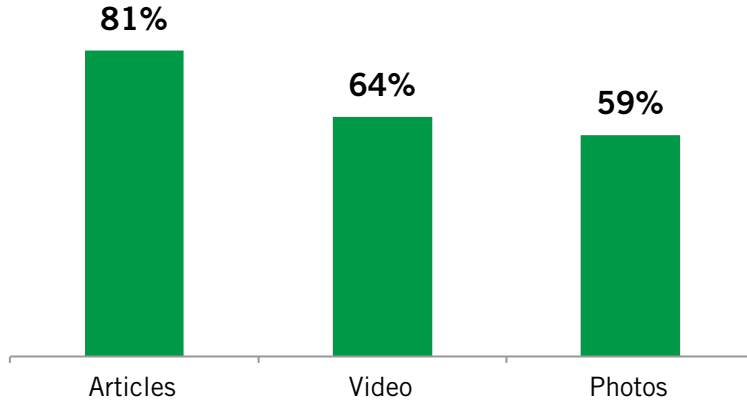
Q1E1. Which media, do you believe, offer native advertising? Check all that apply.

Q1E2. In which media has your company's native advertising run over the past year? Check all that apply.

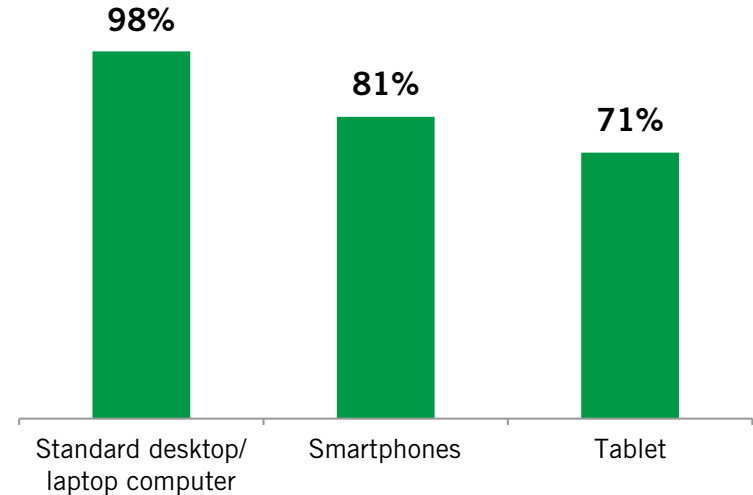
Forms and Platforms of Native Advertising

Base: 63

Forms of Native Content Employed



Platforms Used for Native Advertising



Q3. Which form(s) of native content are you employing? Check all that apply.

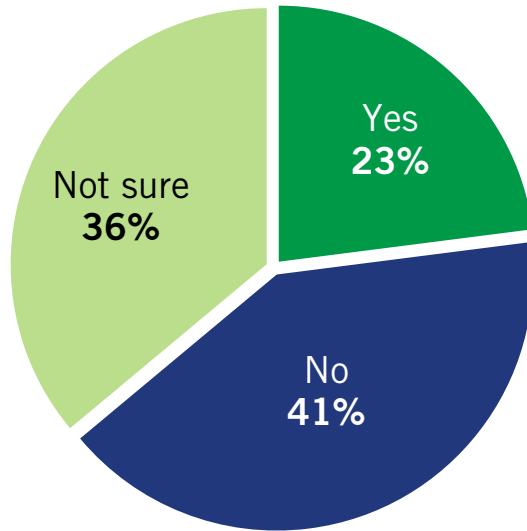
Q2. On which platforms has your online native advertising run over the past year? Check all that apply.

Programmatic/Automation Tools for Native Advertising

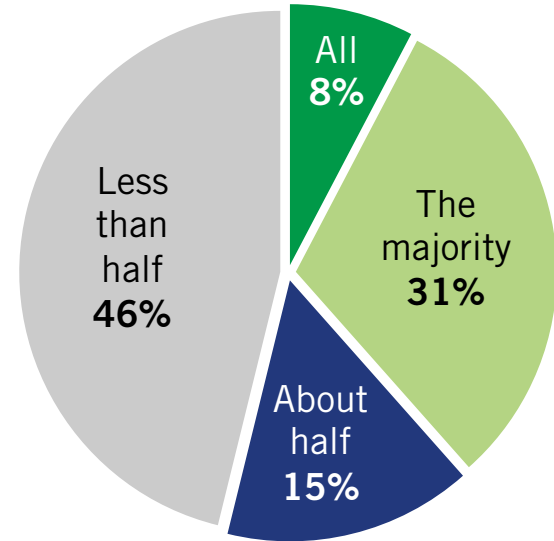
Base: 61

Base: 13*

Use of Programmatic/Automation Tools



Level of Programmatic/Automation Use



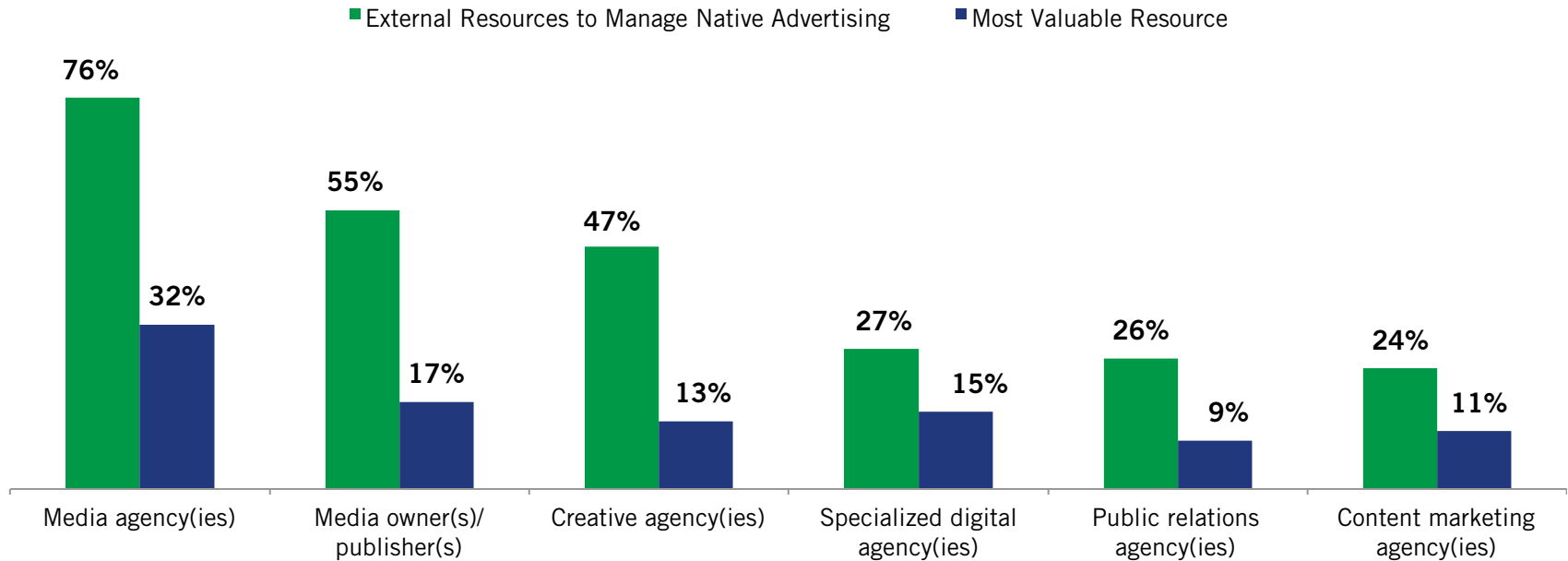
*Caution: very small base

Q5A. Do you use programmatic/automation tools for native advertising?

Q5B. How much of your native advertising uses programmatic/automation tools?

Use External Resources to Manage Native Advertising

Base: 55/53

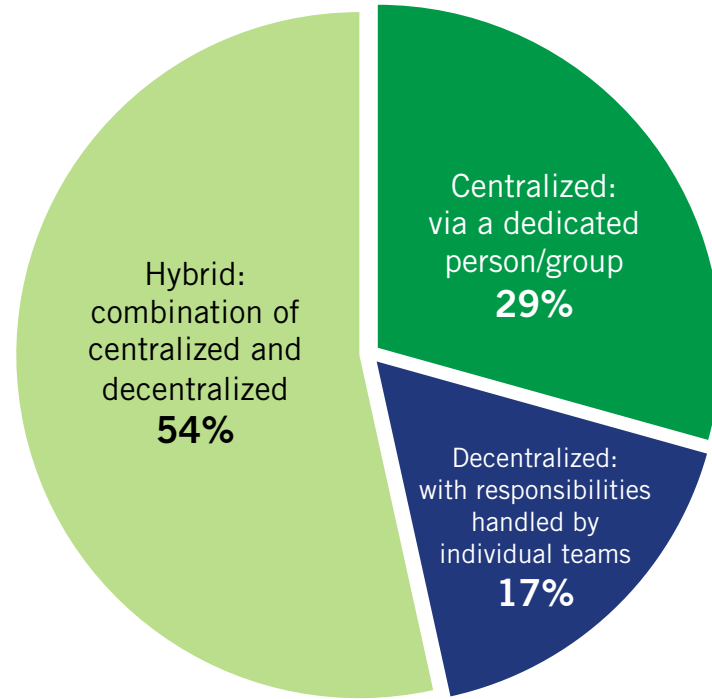


Q9. What types of external resources help manage your native advertising? Check all that apply.

Q10. Thinking about those external resources, which partner is most valuable in helping to manage your native advertising? Check only one.

Organization to Manage Native Advertising

Base: 58



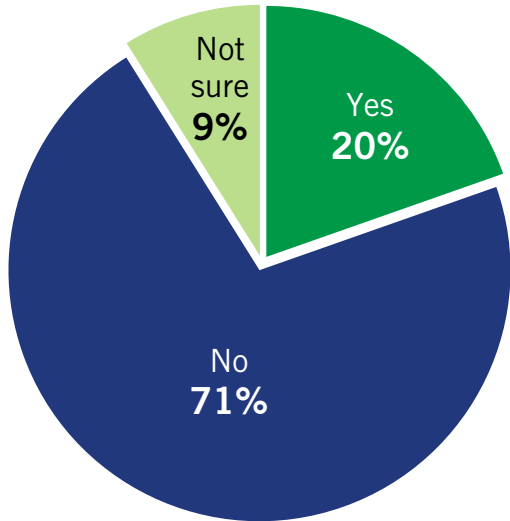
Q11A. How are you, the client, organized to manage native advertising?

Use of Formal Guidelines/Standards for Native Advertising

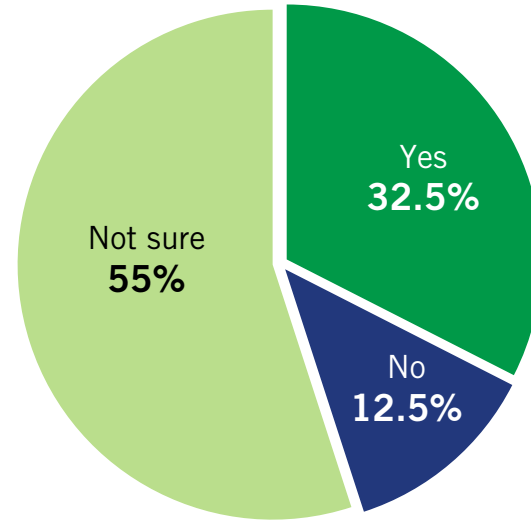
Base: 56

Base: 40

Use of Formal Guidelines/Standards



Plan for Formal Guidelines/Standards

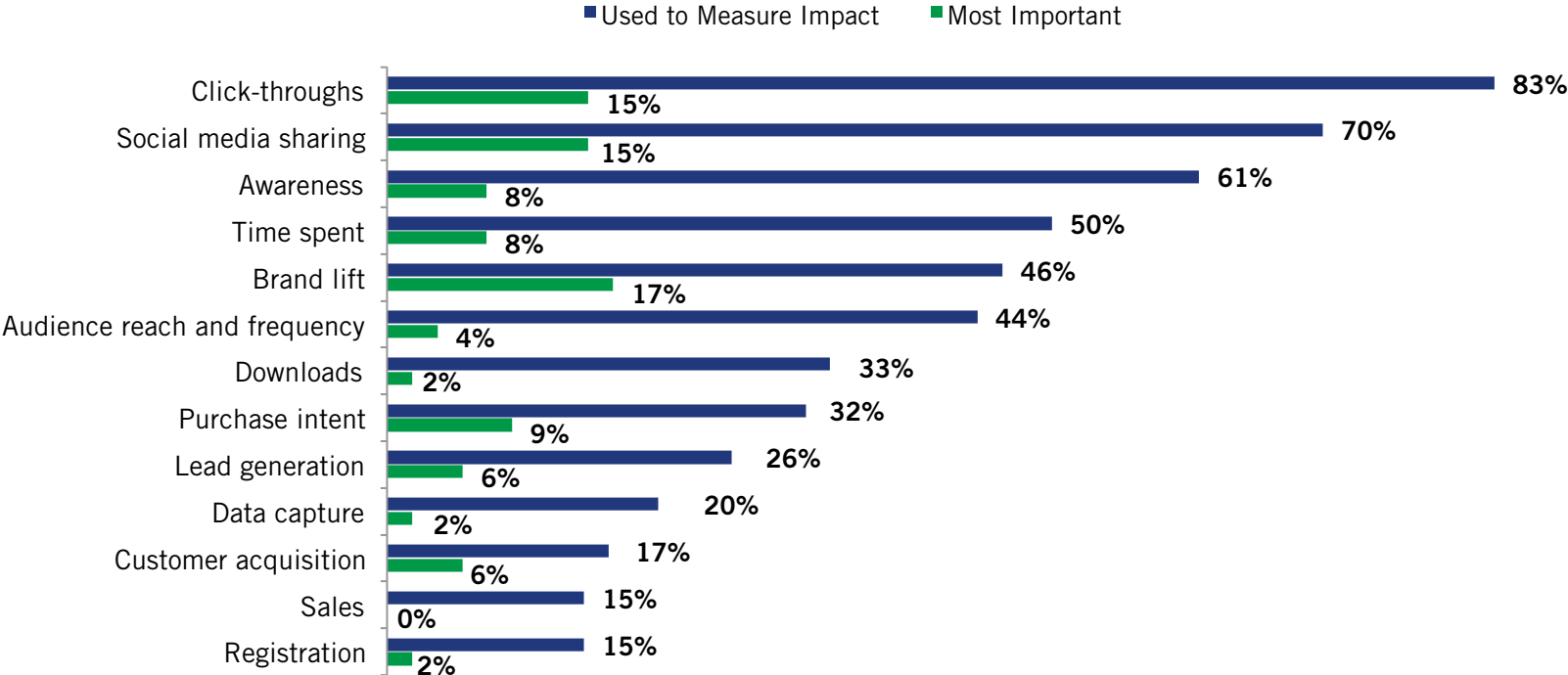


Q13A. Do you have formal, written, internal editorial guidelines or standards for the development of native advertising?

Q13B. If you do not currently have internal editorial guidelines/standards, do you plan on developing such guidelines in the future?

Metrics Used to Measure Native Advertising

Base: 54/53



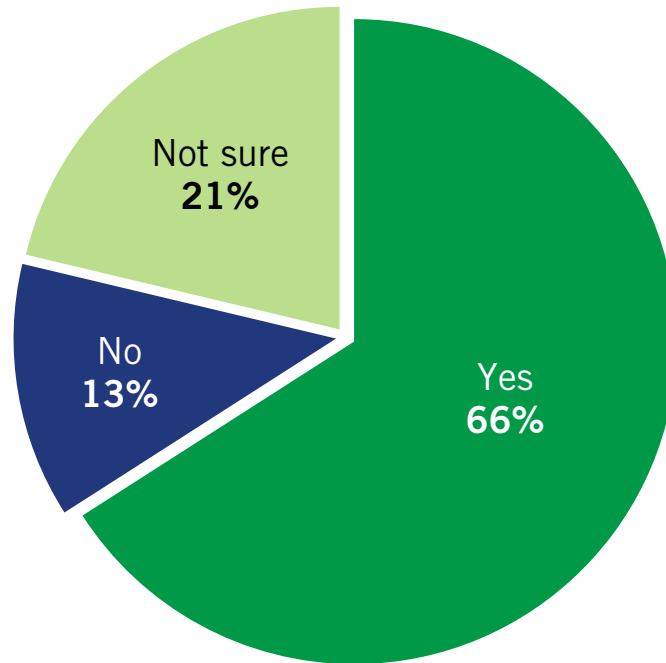
Q14. Which metrics are used to measure the impact of your native advertising? Check all that apply.

Q15. What primary metric is most important to measure the impact of your native advertising? Check only one.



Need Clear Disclosure for Native Advertising

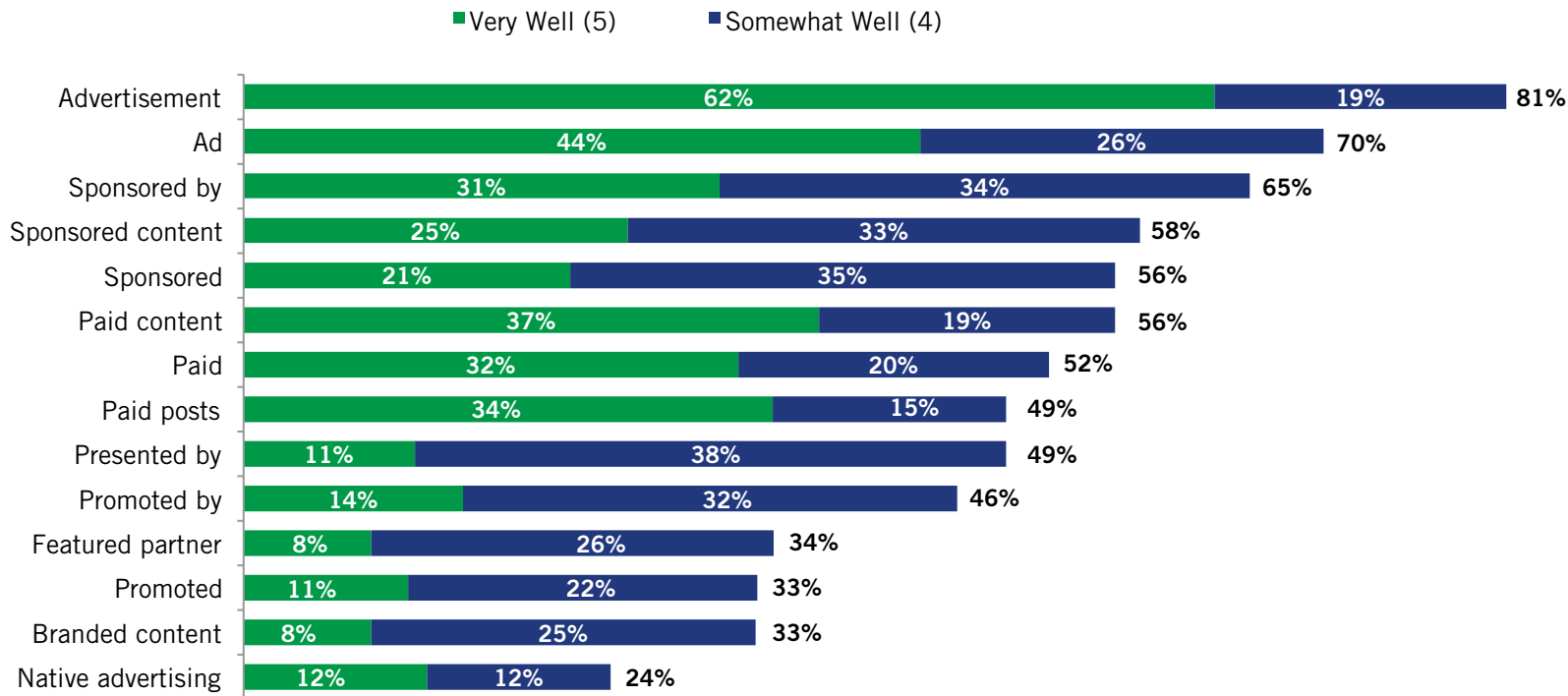
Base: 94



Q17. Does native advertising need clear disclosure that it is indeed advertising?

Terms that Describe Disclosure

Base: 85

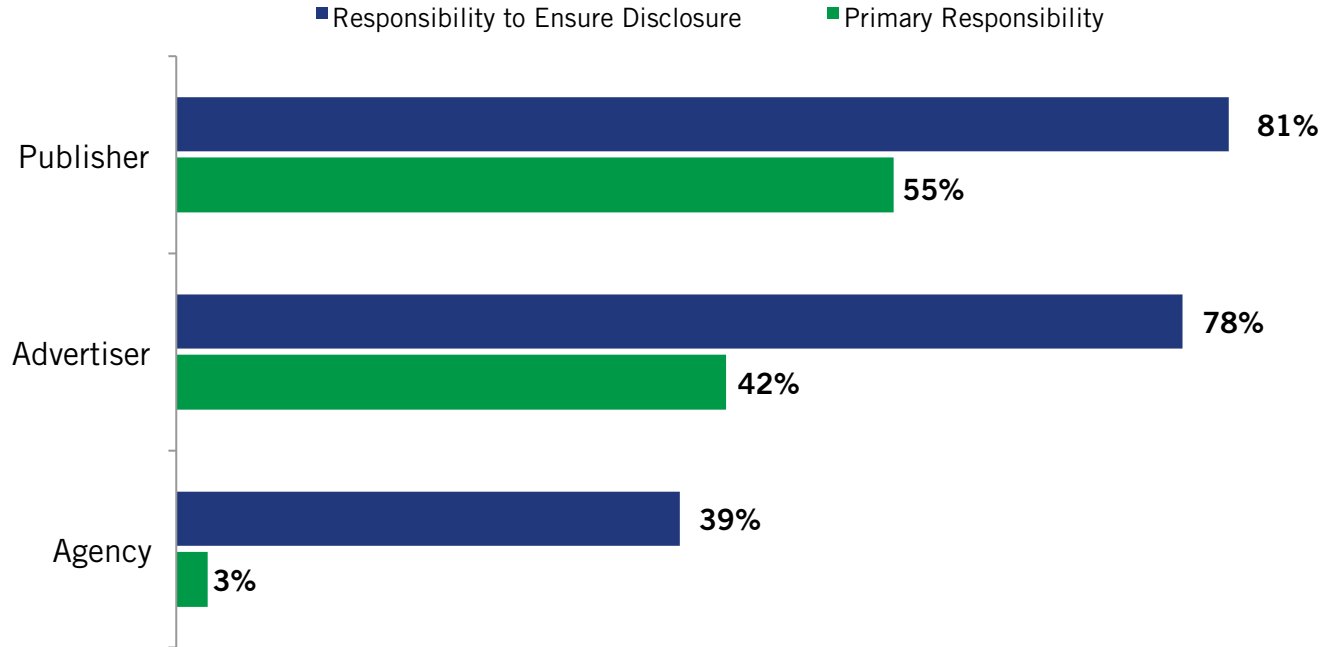


Q18. How well do each of these terms provide such disclosure?



Responsibility to Ensure Disclosure

Base: 85

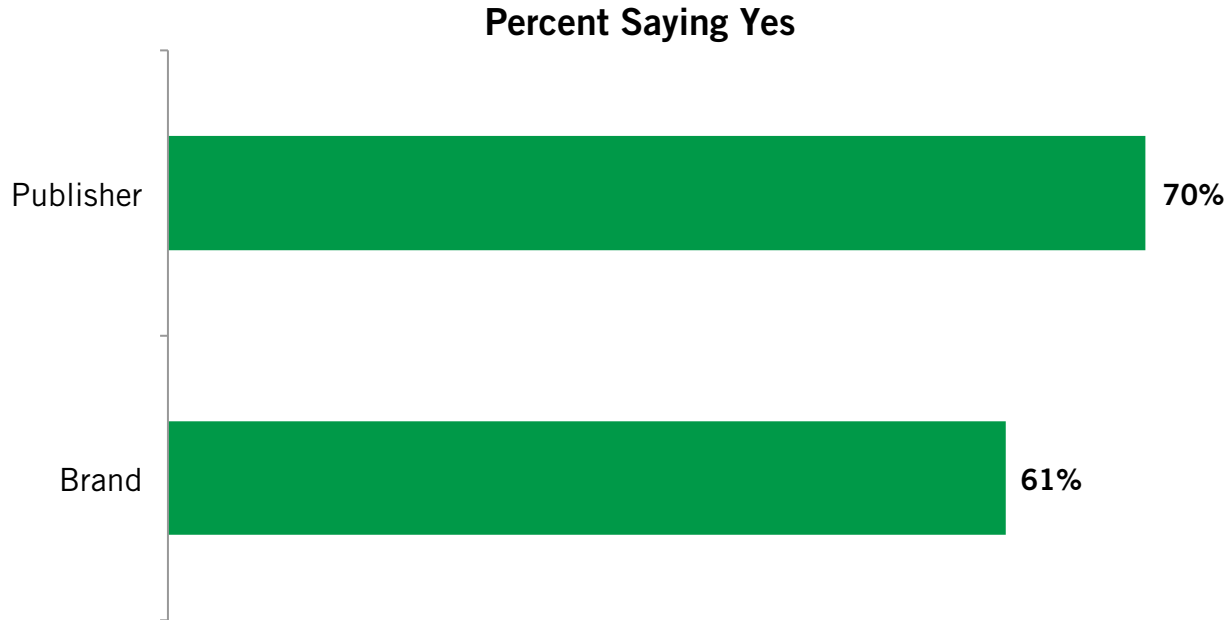


Q19. Who has the responsibility to ensure disclosure? Check all that apply.

Q20. Who has the primary responsibility to ensure disclosure? Check only one.

Advertising Disclosure in Social Media Posts

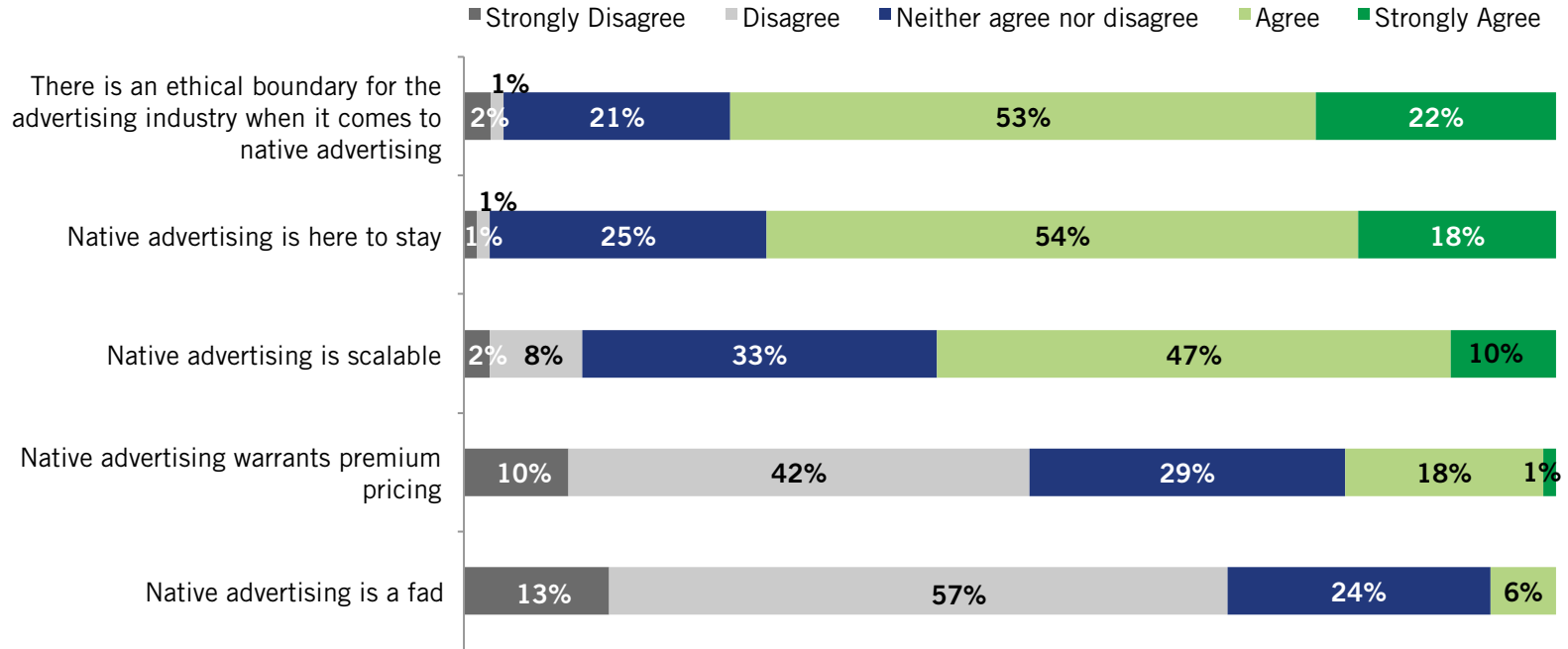
Base: 82



Q21. Social media can be used to amplify native advertising, serving as a gateway to the full native advertising content. In such cases, should there be disclosure in social media posts (a tweet, for example) that they are advertising? Please consider this for both tweets from the brand and tweets from the publisher.

Perceptions of Native Advertising

Base: 83

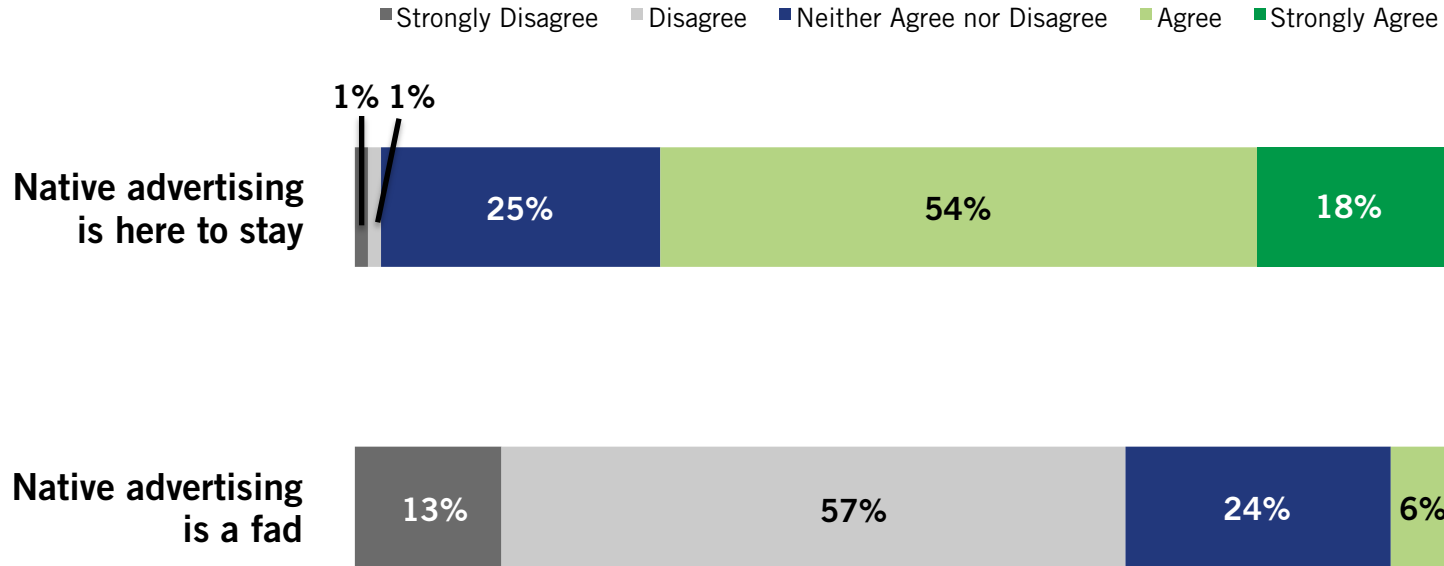


Q22. How strongly do you agree or disagree with the following statements?



Native Advertising: Here to Stay or a Fad?

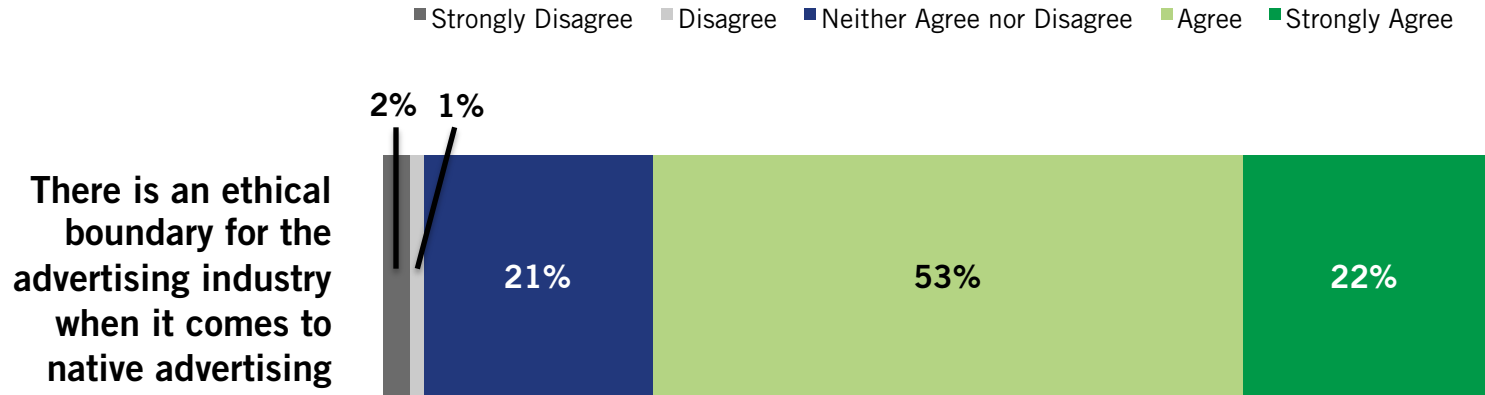
Base: 83



Q22. How strongly do you agree or disagree with the following statements?

An Ethical Boundary?

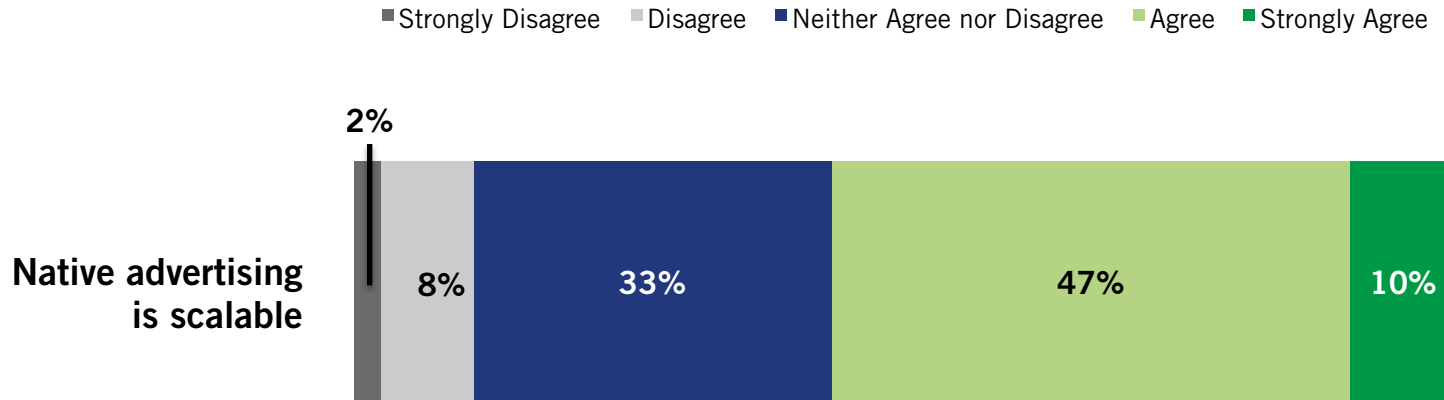
Base: 83



Q22. How strongly do you agree or disagree with the following statements?

Is Native Advertising Scalable?

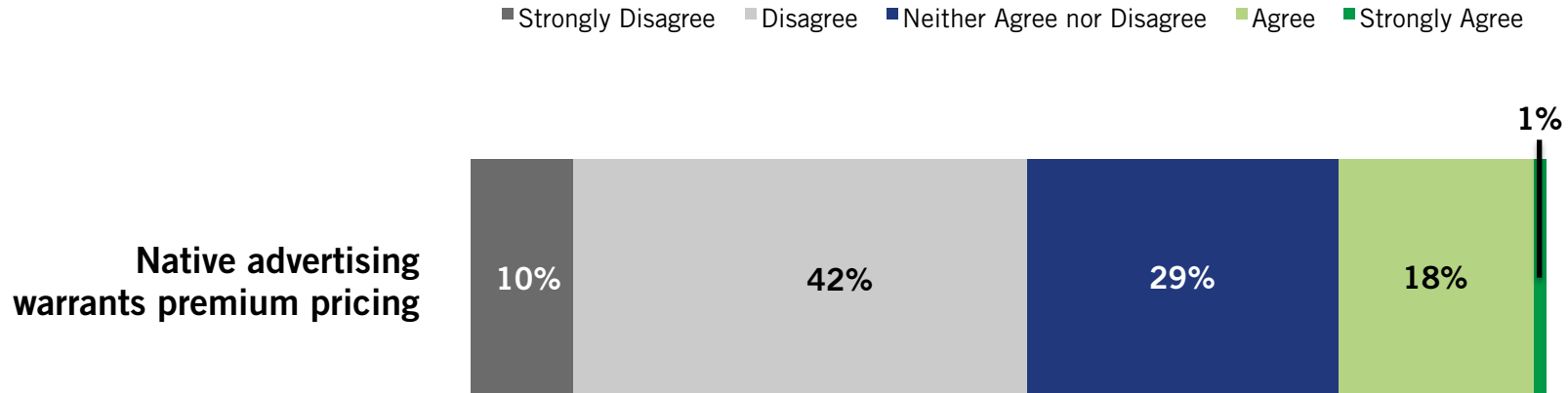
Base: 83



Q22. How strongly do you agree or disagree with the following statements?

Does Native Advertising Warrant Premium Pricing?

Base: 83

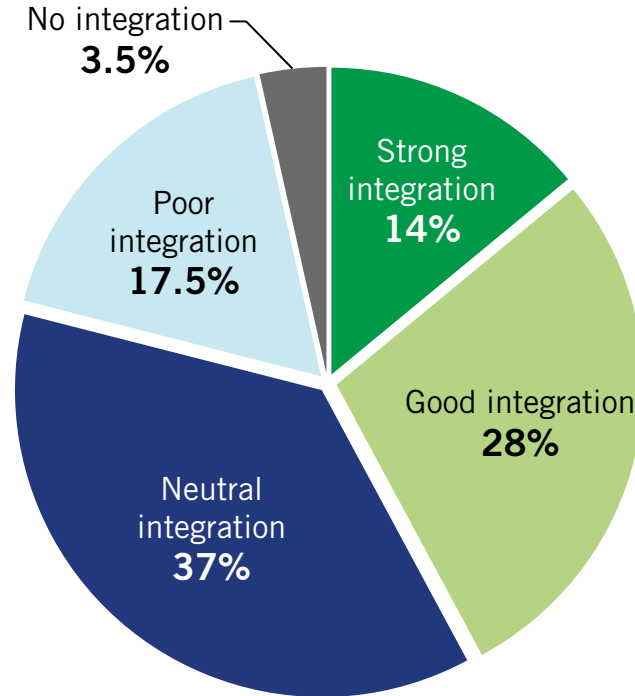


Q22. How strongly do you agree or disagree with the following statements?

Appendix

Native Advertising Integration into Overall Mix

Base: 57

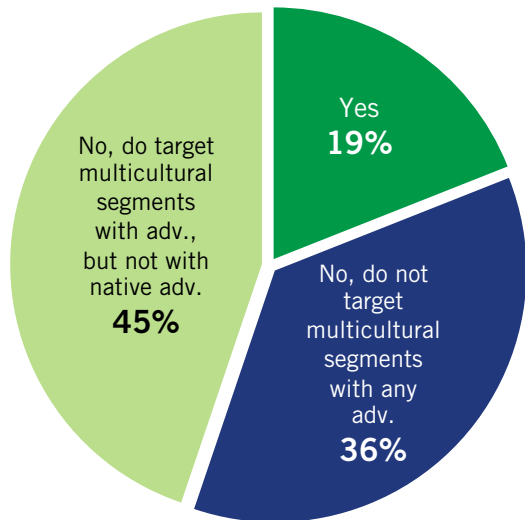


Q12. Thinking about your broader content marketing strategy across paid, owned, and earned media, how well is native advertising integrated into that overall mix?

Native Advertising with Multicultural Segments

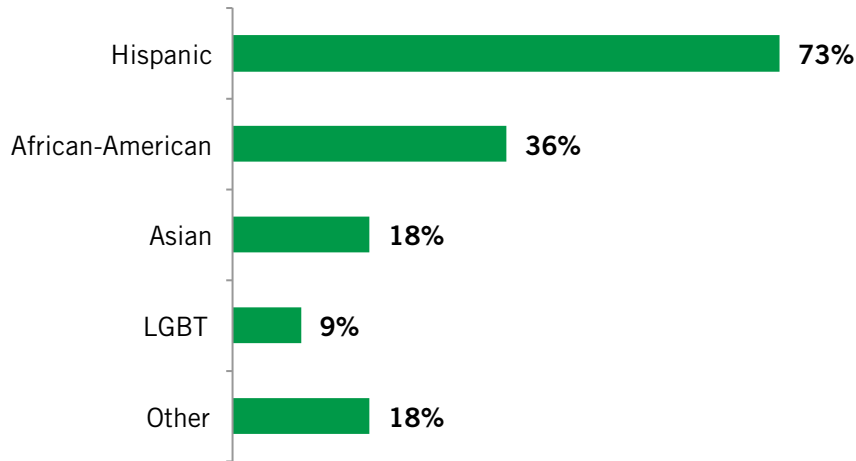
Base: 58

Use of Native Adv. for Multicultural Segments



Base: 11*

Multicultural Segments Targeted



*Caution: very small base

Q4A. Have you used native advertising to connect with specific multicultural segments over the past year?

Q4B. What multicultural segments have you used native advertising for? Check all that apply.

Conclusions and Next Steps

Native advertising provides marketers with the opportunity to create relevant associations between their brands and consumers via content. Done right, native advertising is a win for marketers, consumers, and publishers. Marketers win because their messages have a better likelihood of being seen/read versus traditional advertising. Consumers win because marketing messages have more contextual relevance than traditional advertising. And publishers win given the business development potential.

To enable consumers to tell the difference between native advertising and editorial, proper disclosure that native advertising content is indeed advertising is a must. Marketers have a responsibility to provide that transparency to consumers in order to maintain trust, and they must play a lead role in working with publishers to ensure proper disclosure. The advertising industry has had a long and successful history of self-regulation, but poor (or no) disclosure could undermine the long-term potential of native advertising and result in the threat of government intervention.

More advertisers need to have formal, written, internal editorial guidelines for the development of native advertising. Such guidelines should include recommendations on disclosure.

Finally, measurement challenges could impede further growth of native advertising. The industry would benefit from a deeper understanding of the metrics that matter most for native.

About the ANA

The ANA (Association of National Advertisers) provides leadership that advances marketing excellence and shapes the future of the industry. Founded in 1910, the ANA's membership includes more than 640 companies with 10,000 brands that collectively spend over \$250 billion in marketing and advertising. The ANA also includes the Business Marketing Association (BMA) and the Brand Activation Association (BAA) which operate as divisions of the ANA. The ANA pursues “collaborative mastery” that advances the interests of marketers and promotes and protects the well-being of the marketing community.

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