

ADVERTISING IS GOING  
**NATIVE**



*ANA surveys are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today.*

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## Background and Methodology

Native advertising has been one of the hottest and most controversial terms of the past year.

Native advertising is an advertising method in which the advertiser attempts to gain attention by providing messaging in the context of the user's experience. Native ad formats match both the form and function of the user experience in which they are placed. The advertiser's intent is to make the paid advertising feel less intrusive and increase the likelihood users will engage with it.

Native advertising is a subset of content marketing, which can consist of paid, owned, and earned media. Native advertising is paid media. Owned media could include a brand's website and email newsletters. Earned media includes online word of mouth via social media posts, reviews, recommendations, etc.

In the fourth quarter of 2014, the ANA surveyed members to understand how they use and budget for native advertising, manage its implementation internally and externally, and measure its success. The survey was also meant to reveal marketers' opinions on questions of disclosure and ethics.

In total, 127 client-side marketers are represented in this survey. Of those, 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.

ANA committee chairs provided the initial input on specific survey questions. The ANA would also like to acknowledge the Interactive Advertising Bureau and Digital Content Next for their contributions to the survey design.

*"Native advertising is not the savior of advertising or publishing, and it's not the devil, either. It's a tactic."*  
— Survey respondent

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January 2015

# Key Findings

**1.** Among ANA members surveyed, almost three in five (58 percent) say their company has engaged in native advertising during the past year, with spending on native advertising increasing.

- ▶ Past year budgets for native advertising increased for 55 percent of respondents.
- ▶ In the next year, 63 percent of respondents expect to increase budgets allocated to native advertising.

However, native advertising currently accounts for a small percentage of overall advertising budgets — 5 percent or less for 68 percent of respondents.

**2.** Both B-to-C and B-to-B marketers use native advertising.

- ▶ Sixty-seven percent of B-to-C marketers and 54 percent of B-to-B marketers have engaged in native advertising over the past year.
- ▶ Forty-eight percent of B-to-C marketers and 75 percent of B-to-B marketers said their native advertising budgets increased in 2014.
- ▶ Sixty-eight percent of B-to-C marketers and 59 percent of B-to-B marketers expect their native advertising budgets to increase in 2015.

**3.** The main benefit of native advertising is the ability to create extremely relevant associations between the brand and consumer via content. Given today's media landscape, where consumers can avoid ads more than ever, advertisers are looking for new ways to get their messages noticed and acted upon.

**4.** Native advertising is most commonly associated with digital/online and social media, and usage is highest across both. Eighty-five percent of respondents who engage in native advertising do so via digital/online publishers, and 71 percent through social media. To a secondary extent, native is associated with print media, and has a modest level of usage there.

**5.** Eight in 10 marketers employ native advertising via articles, and roughly six in 10 use native video and photos.

**6.** Many external resources have roles in helping marketers manage native advertising: media agencies, media owners/publishers, creative agencies, specialized digital agencies, public relations agencies, and content marketing agencies. Media agencies have the highest incidence of usage and are identified as the "most valuable" resource.

**7.** Measuring the impact of native advertising is a challenge. Multiple metrics are employed, but no metric stands out as "most important."

**8.** Only 19 percent of respondents believe that native advertising warrants premium pricing.

**9.** Disclosure and ethics are key issues.

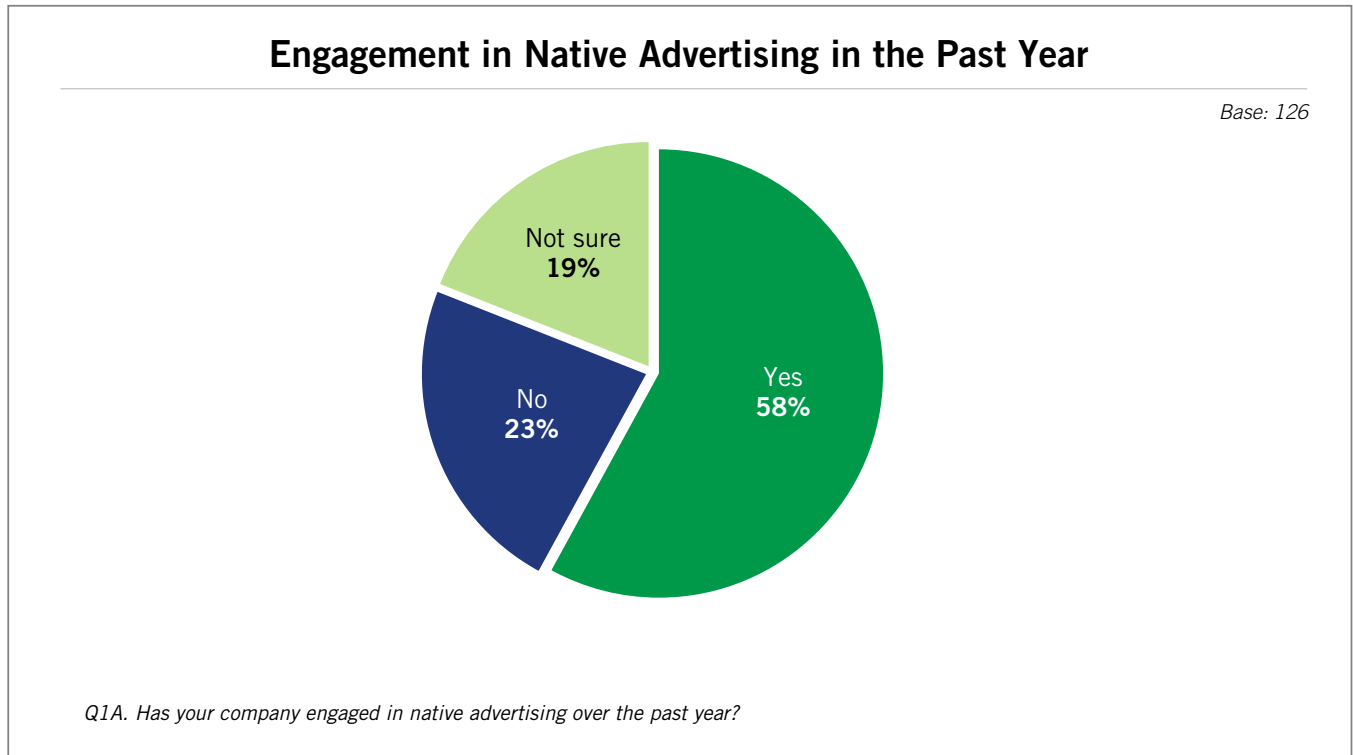
- ▶ Two-thirds of respondents agree that native advertising needs clear disclosure that it is indeed advertising. Only 13 percent feel that such disclosure is not needed.
- ▶ Both the publisher and the advertiser have a responsibility to ensure disclosure.
- ▶ Three-fourths of respondents feel that there is an ethical boundary for the advertising industry when it comes to native advertising.

**10.** Disclosure and transparency are major concerns about native advertising that keep respondents up at night.

# Detailed Findings

## USAGE AND BUDGETS

Fifty-eight percent of all respondents have engaged in native advertising over the past year.



Sixty-seven percent of B-to-C marketers have engaged in native advertising over the past year versus 54 percent of B-to-B marketers.

## Detailed Findings .....

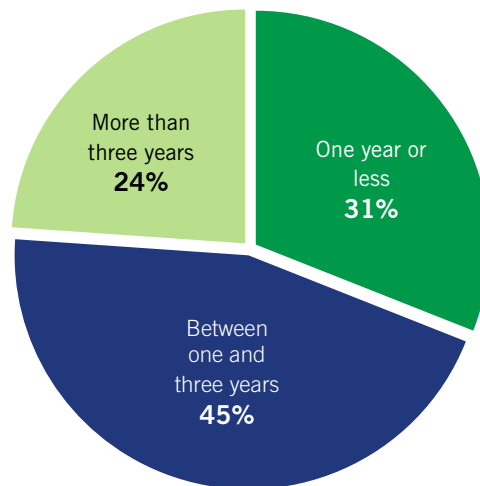
Native advertising is perceived to be a “new” tactic by many respondents, as 76 percent note that their company has engaged with native advertising for three years or less.

Yet one respondent said, “Native advertising is not new. It has been around for years. While ‘native advertising’ is a new buzzword, it really isn’t a new idea.”

This is a fair point, as advertorials — ads in the form of editorial content — have existed for decades, used primarily in magazines. Meanwhile, in television, branded entertainment has allowed advertisers to integrate messaging into the context of the viewer’s experience.

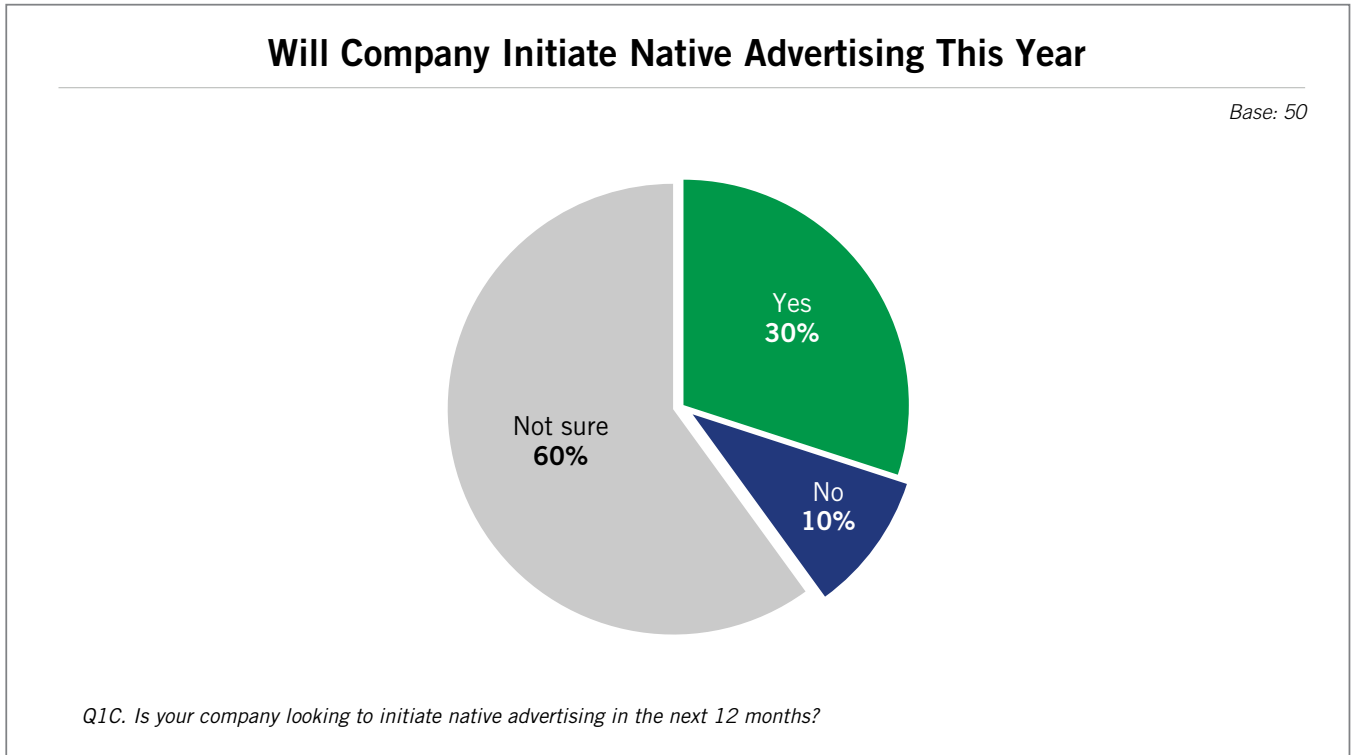
### Number of Years Engaged in Native Advertising

Base: 71

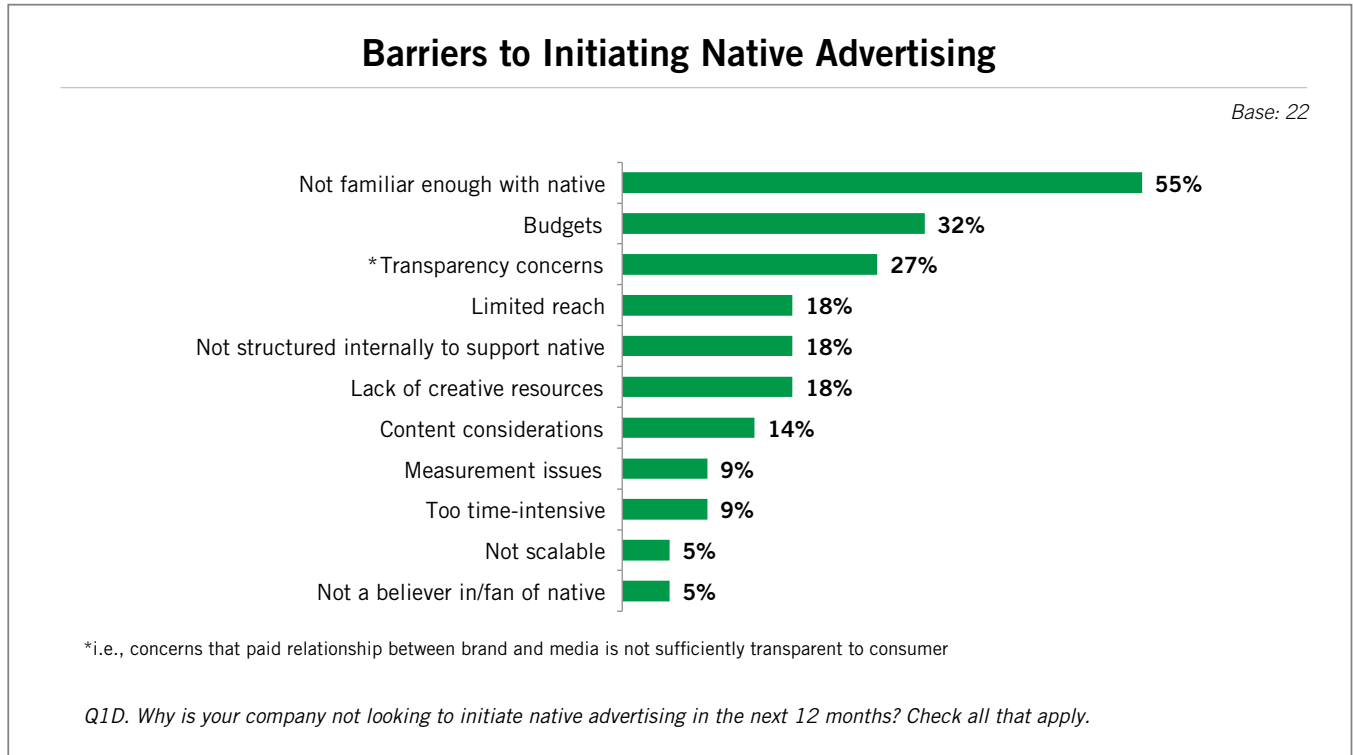


Q1B. How long has your company been engaged in native advertising?

For those respondents not currently engaged with native advertising, 30 percent expect to initiate a program in the next year.



For respondents whose companies are not looking to initiate native advertising in the next year, the primary barrier is unfamiliarity with the tactic.



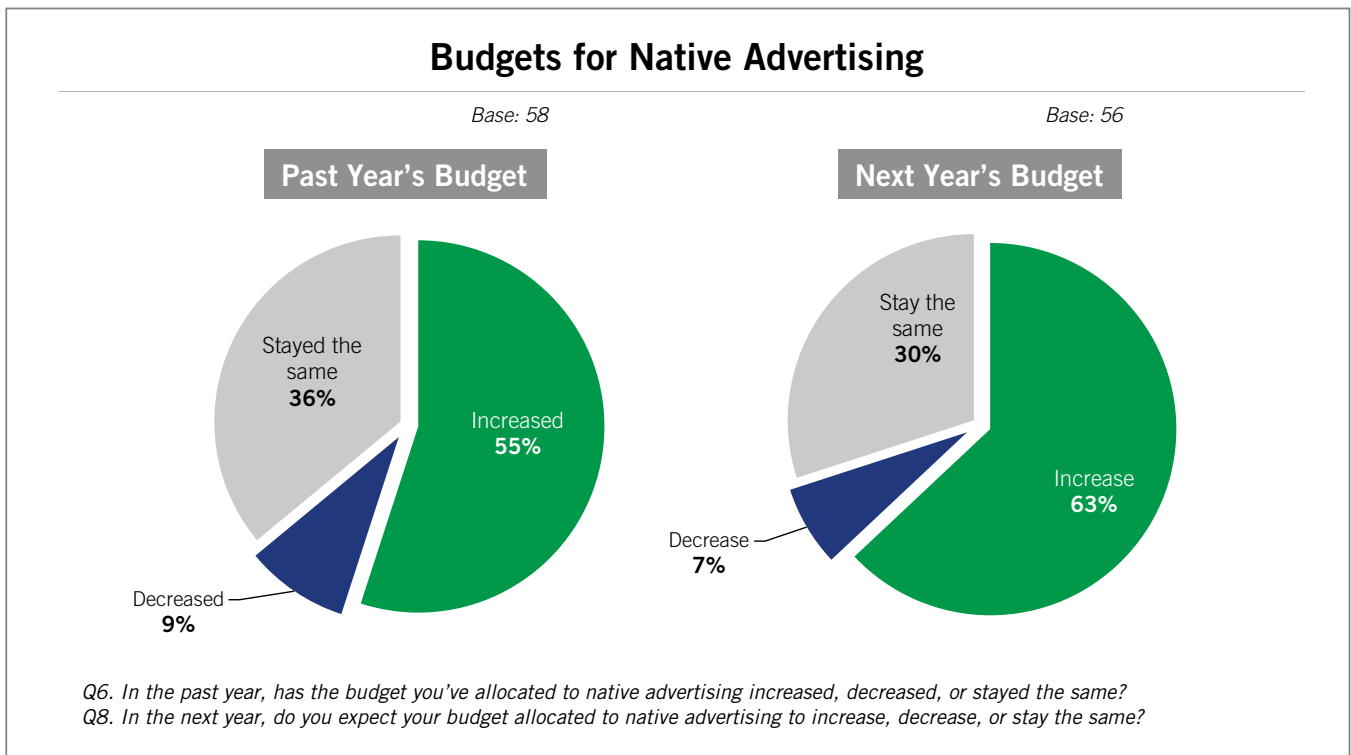


## Detailed Findings

Fifty-five percent of respondents said their native advertising budgets increased in 2014. Increases were noted by 75 percent of B-to-B marketers and 48 percent of B-to-C marketers.

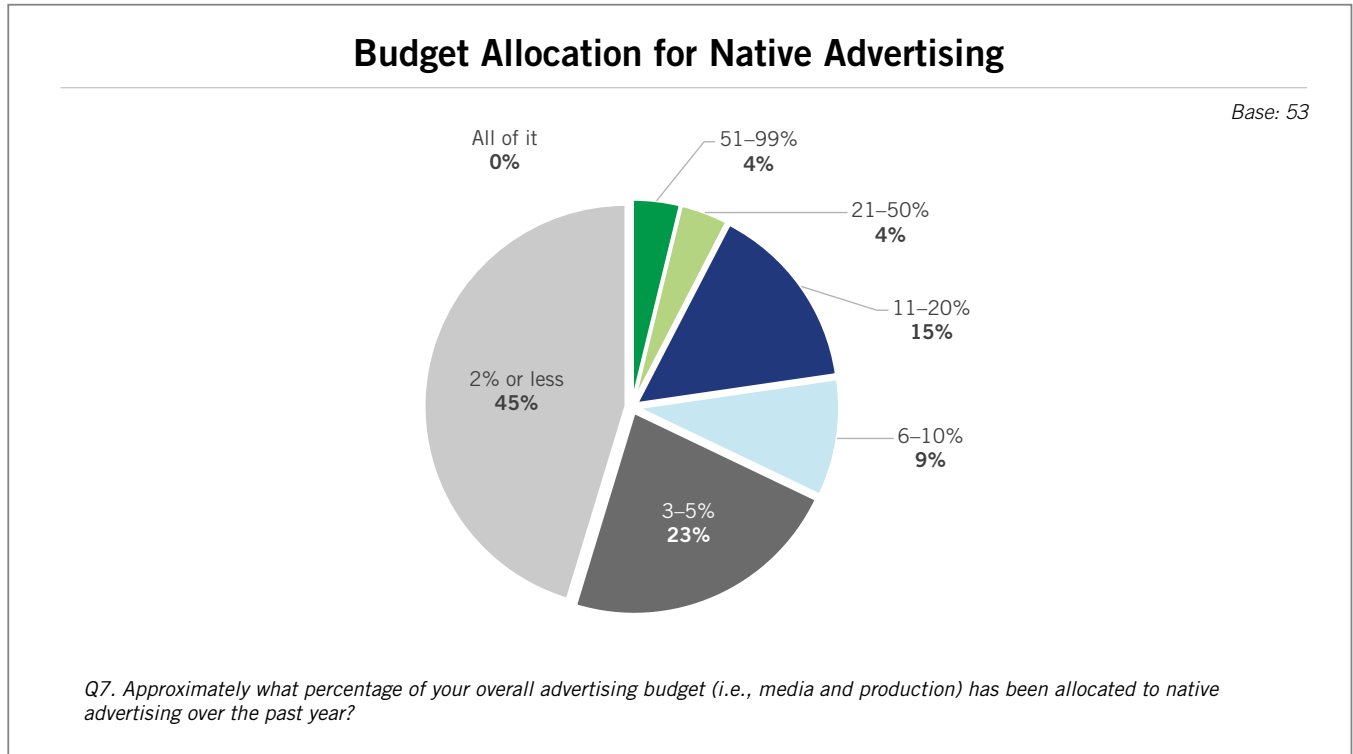
Sixty-three percent of respondents expect their native advertising budgets to increase in 2015. Sixty-eight percent of B-to-C marketers and 59 percent of B-to-B marketers expect budget increases.

These increases are likely due to the fact that advertisers are looking for new ways to get their messages noticed and acted upon, given today's media landscape where consumers can avoid ads more than ever (e.g., via DVRs). Furthermore, with an increased emphasis on "storytelling" for brands, native advertising provides the ability for brands to provide more in-depth content.



## Detailed Findings

Native advertising currently accounts for 5 percent or less of overall advertising budgets for a majority (68 percent) of respondents.



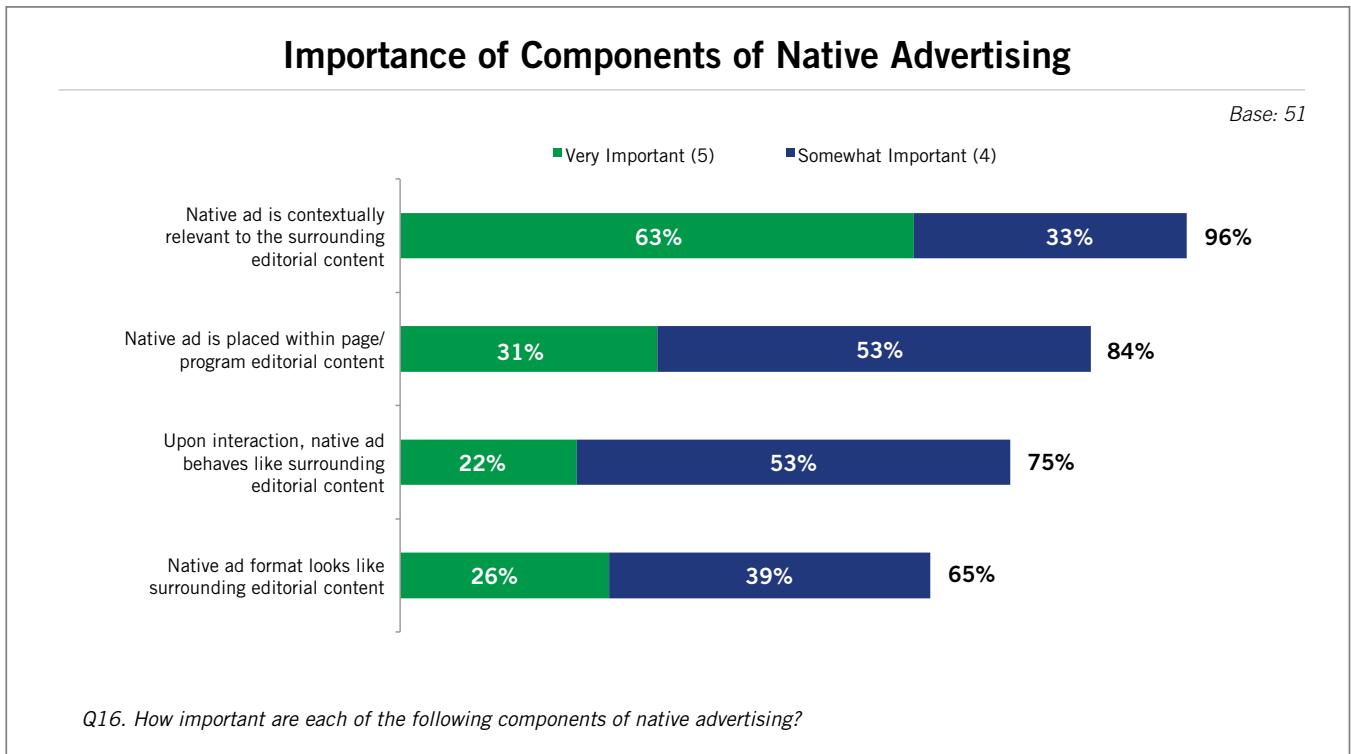
# Detailed Findings

## BENEFITS

The main benefit of native advertising, per survey respondents, is the ability to create extremely relevant associations between the brand and consumer via content. When respondents were asked to “describe in a sentence the benefit that native advertising provides,” verbatim responses included:

- “Better engagement if there is a good link between editorial and paid content.”
- “Customer engagement opportunities are enhanced by native advertising.”
- “Done right, native advertising offers contextually relevant information that adds to, rather than interrupts, the consumer’s activity.”
- “For advertisers, native enables the likelihood that advertising content will be contextually relevant — and presumably of greater value to both consumers and publishers.”
- “It provides the opportunity to get your message to the consumer without an overt feeling of being pitched to.”
- “The integration of messaging into relevant content allows for seamless communication in a natural way.”
- “When done correctly, native advertising adds value to a consumer’s experience, provided it delivers relevant and contextual information.”

The importance of contextual relevance was reaffirmed in a question that asked respondents to rate various components of native advertising. Contextual relevance to the surrounding editorial content was rated as very important by 63 percent of respondents and top-two-box importance by 96 percent.

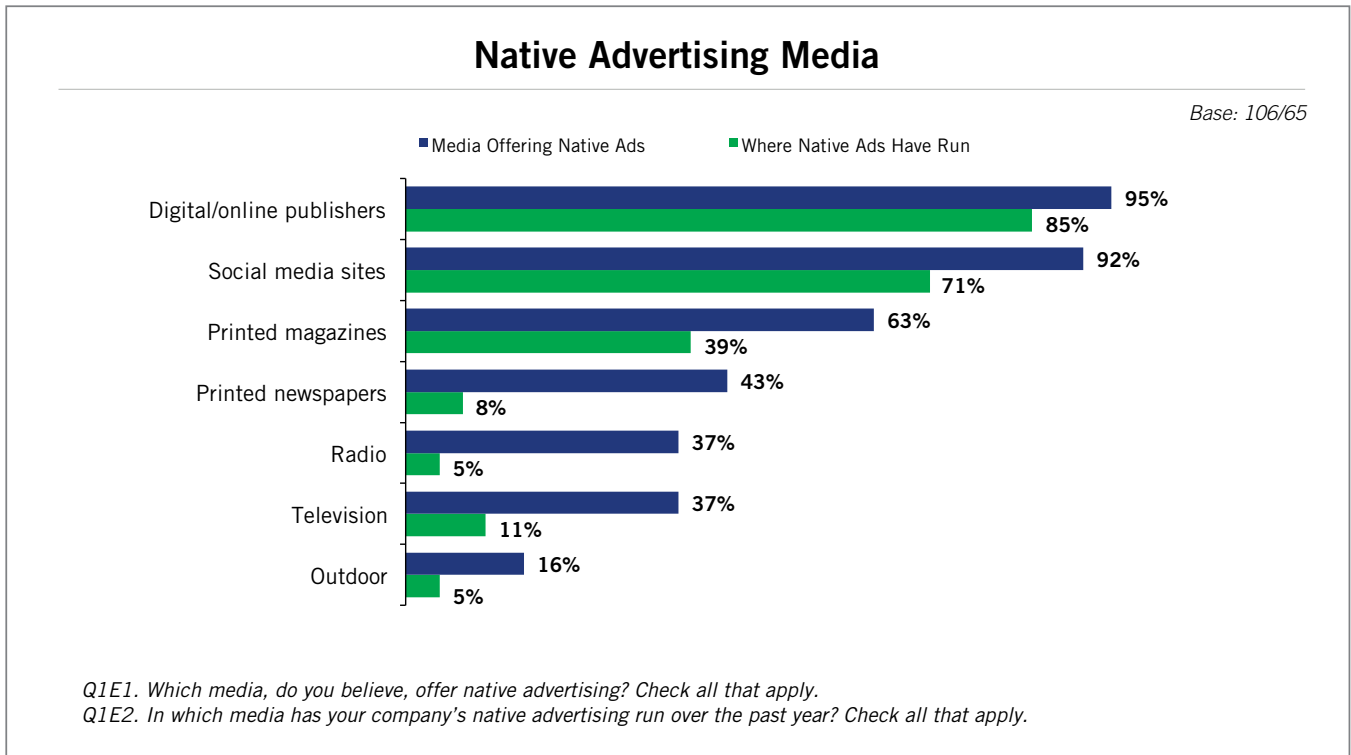


# Detailed Findings

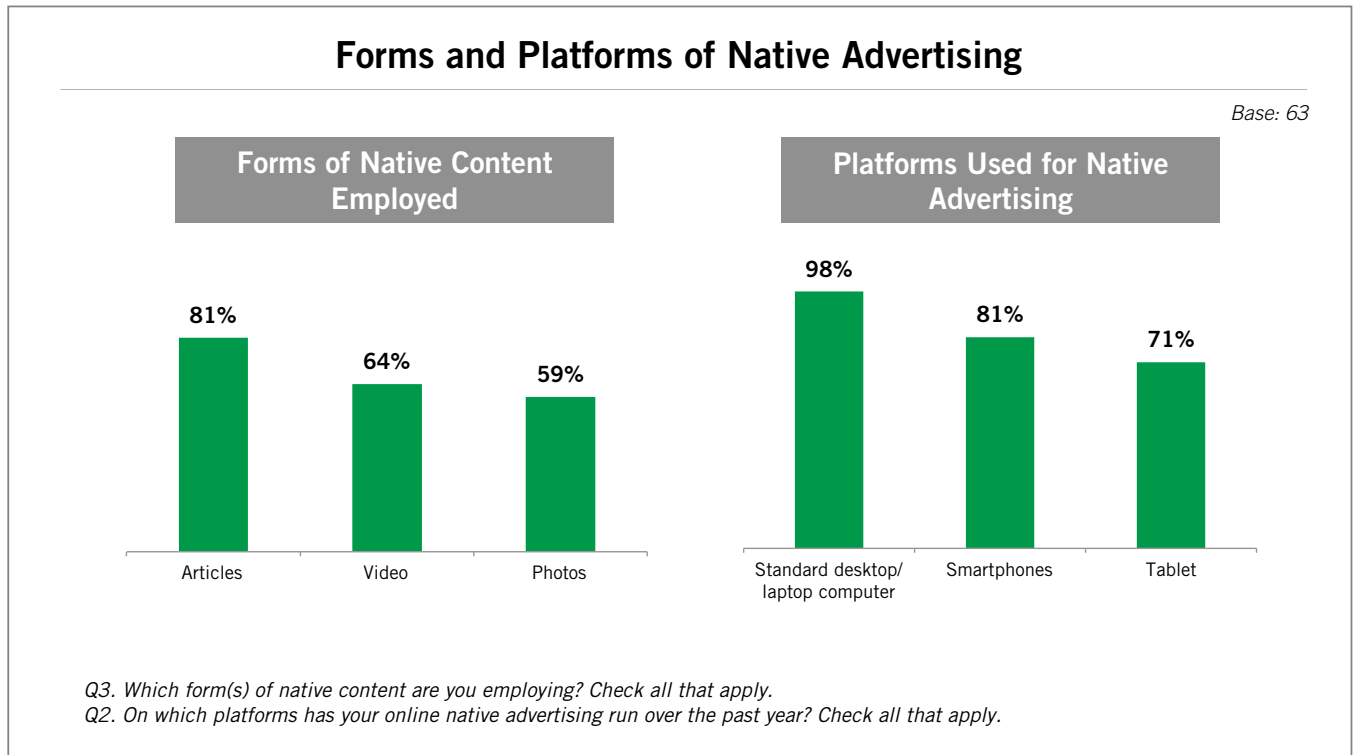
## MEDIA, CONTENT TYPES, PLATFORMS, AND AUTOMATION

Respondents were asked to note (a) which media they believe offer native advertising and (b) which media their company has used for native advertising over the past year.

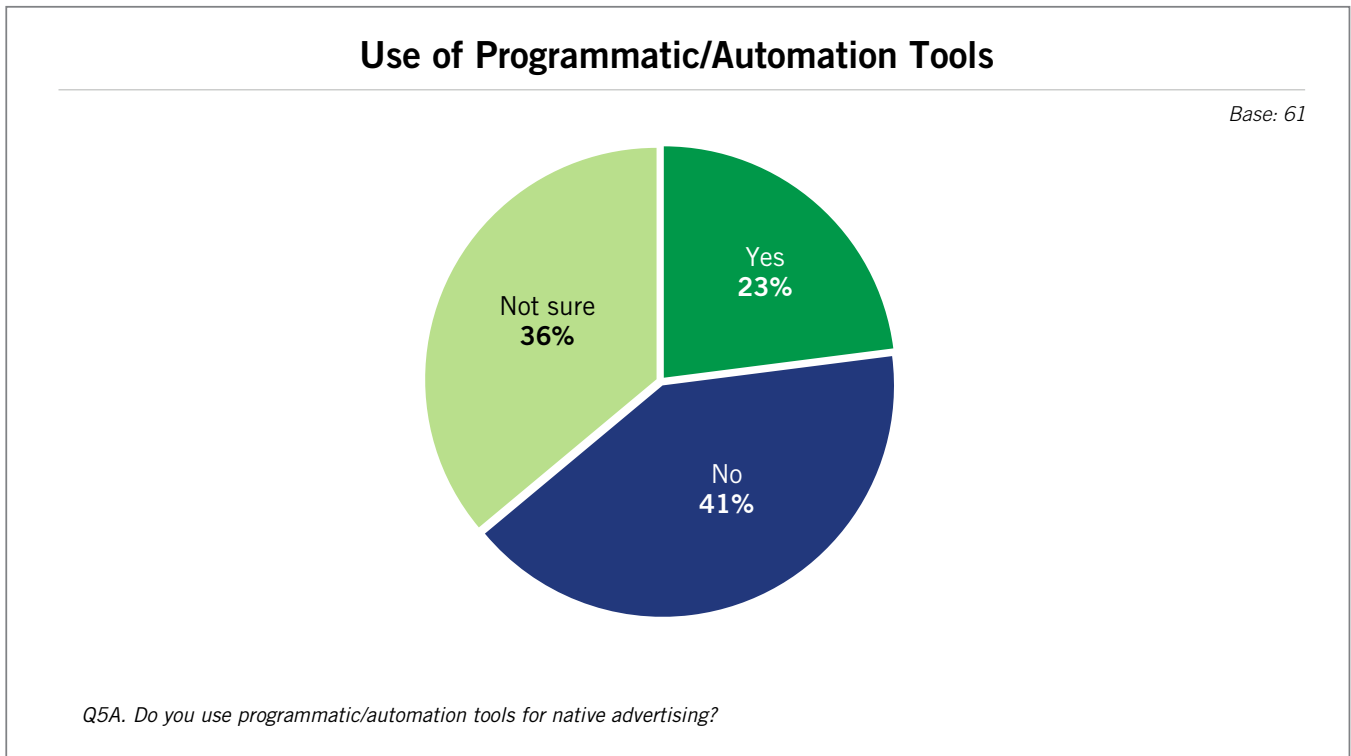
Native advertising is most commonly associated with digital/online and social media, and usage is highest across both. To a secondary extent, native is associated with print media, and has a modest level of usage there.



The content most often employed for native advertising is articles, followed by video and photos. Native advertising runs across all digital platforms: standard desktop/laptop computers, smartphones, and tablets.

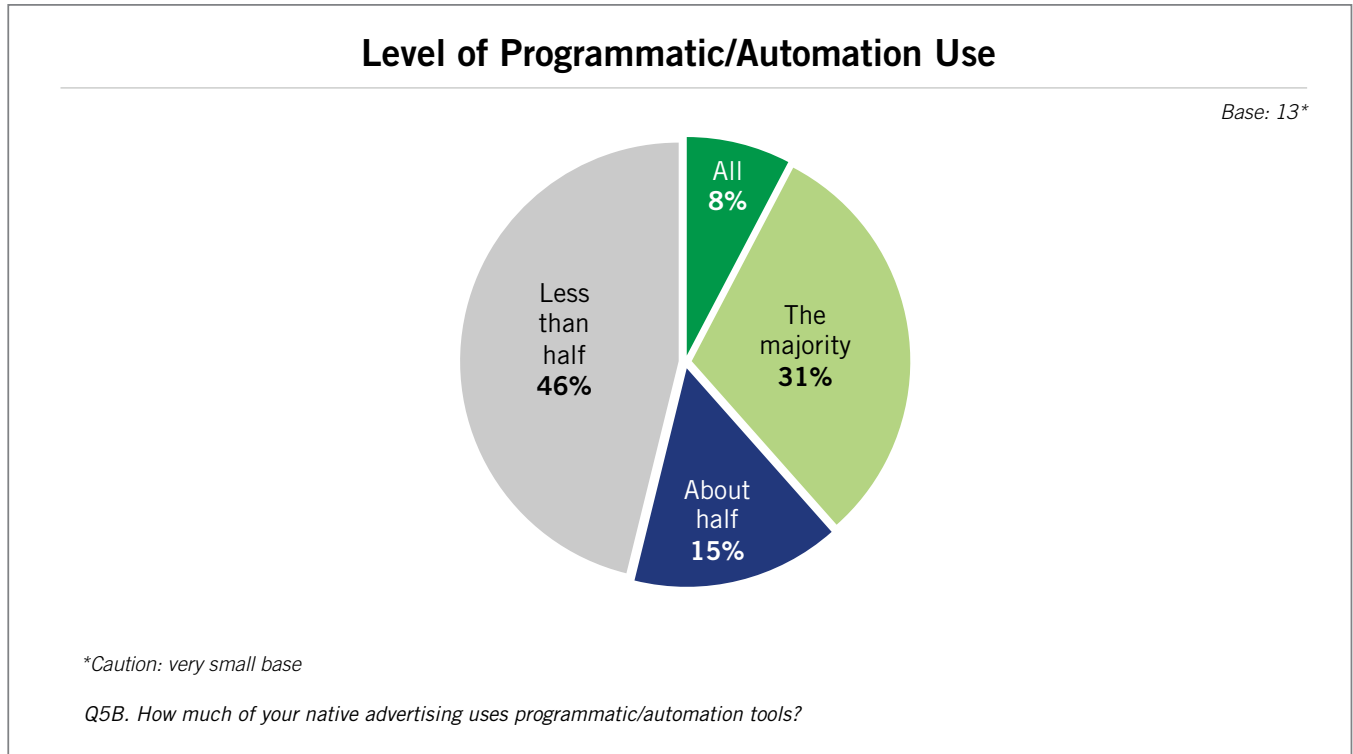


Programmatic/automation tools for native advertising are used by only 23 percent of respondents. The higher percentage (36 percent) of those who said they are not sure how much these tools are used in their native advertising indicates a lack of understanding about programmatic media buying, a fact noted in a previous study. According to the 2014 ANA/Forrester report, “[Media Buying’s Evolution Challenges Marketers](#),” more than half of the marketers surveyed confessed that they don’t understand programmatic buying well enough to use it to buy and manage campaigns.



Detailed Findings .....

Interestingly, among those respondents who do use programmatic/automation tools, almost 40 percent do so for all or the majority of their native advertising.



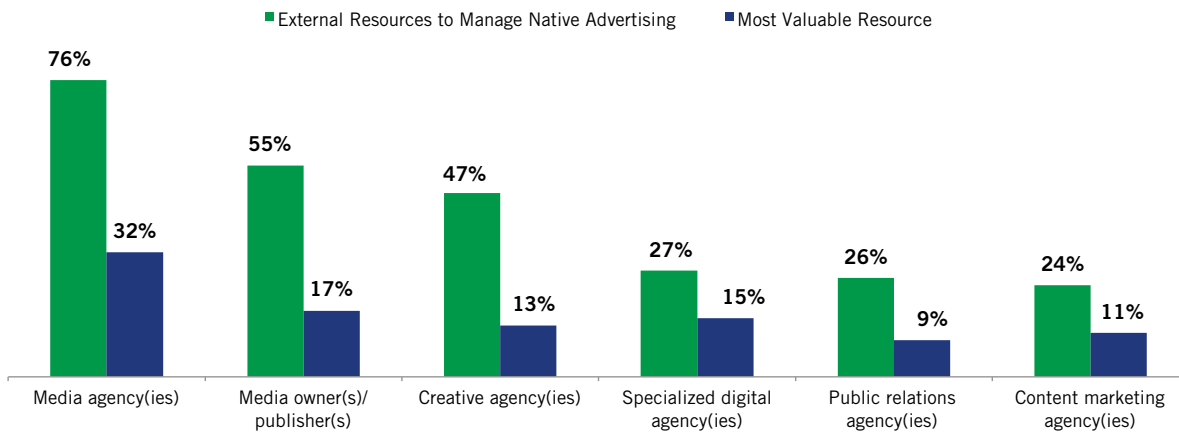
# Detailed Findings

## MANAGEMENT OF NATIVE ADVERTISING

Many external resources have roles in helping marketers manage native advertising: media agencies, media owners/publishers, creative agencies, specialized digital agencies, public relations agencies, and content marketing agencies. Not surprisingly, media agencies have the highest incidence of usage and are identified as the “most valuable” resource.

### Use External Resources to Manage Native Advertising

Base: 55/53

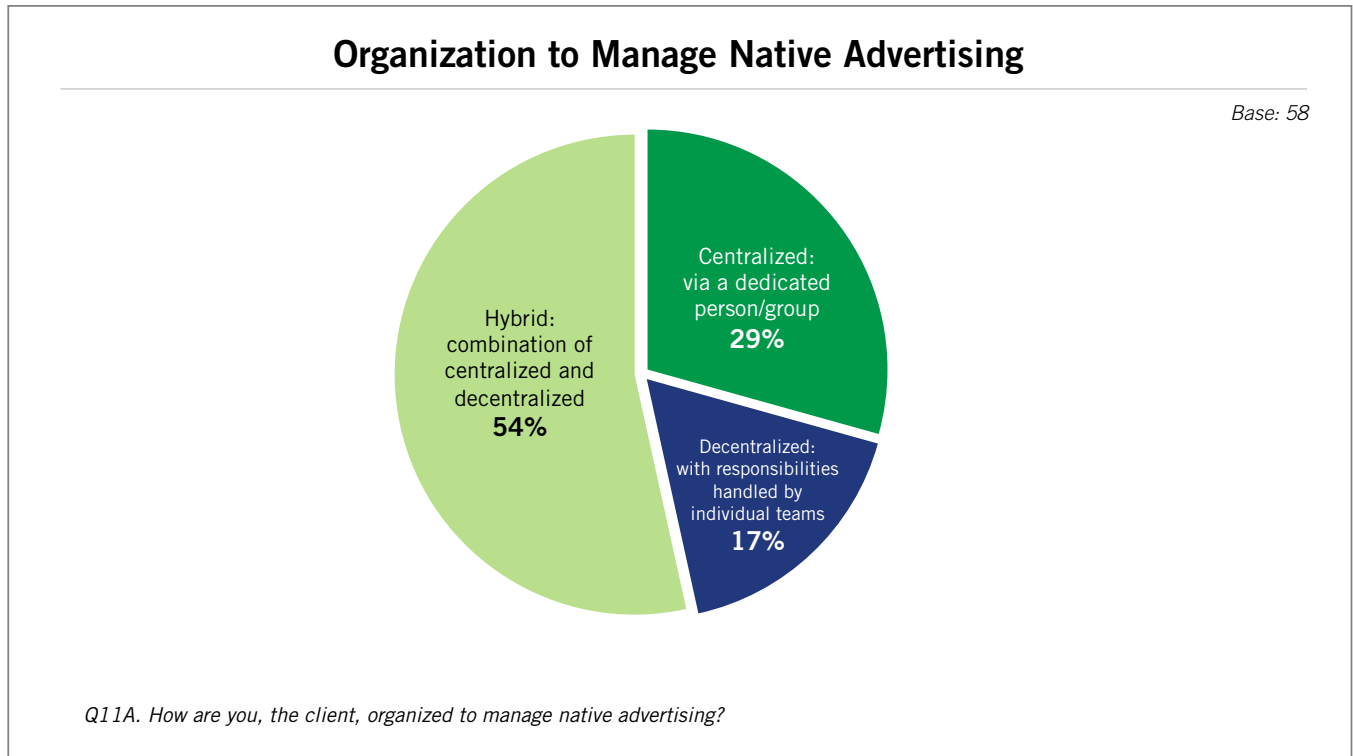


Q9. What types of external resources help manage your native advertising? Check all that apply.

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

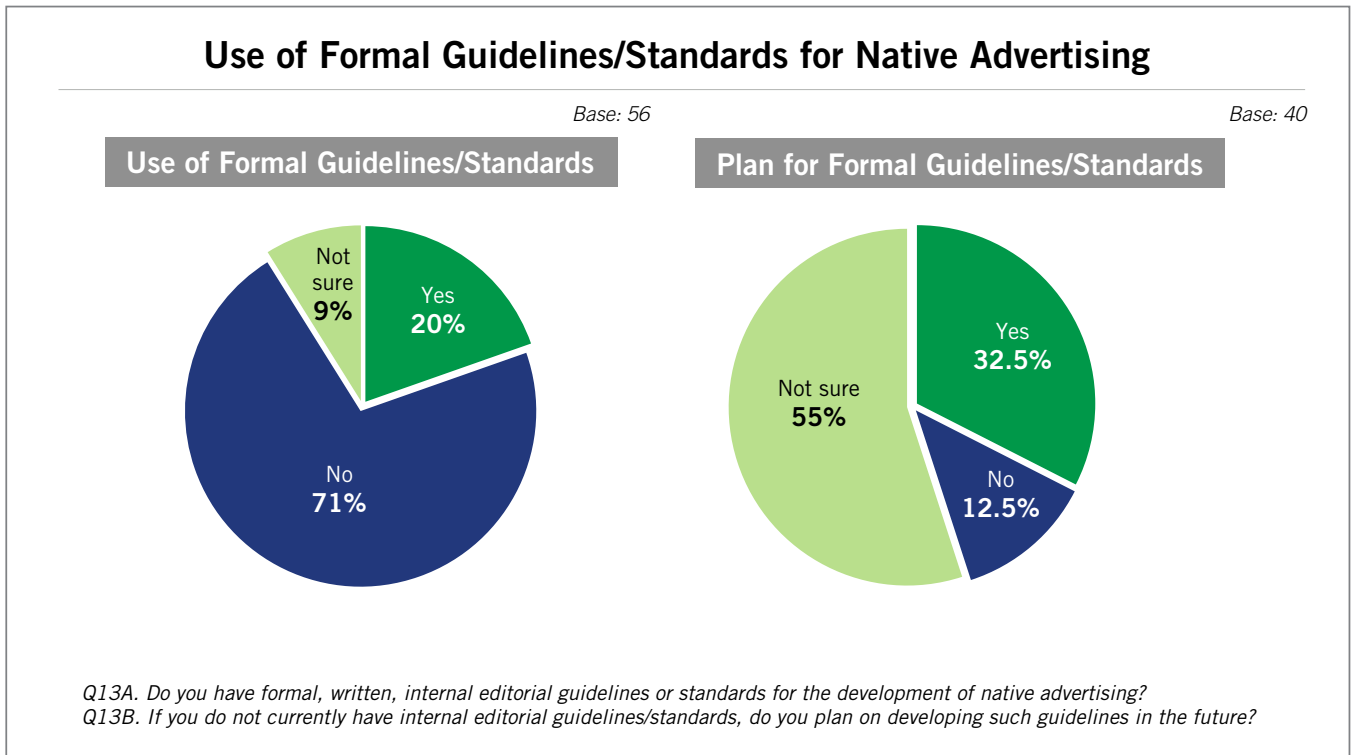


Meanwhile, 29 percent of marketers manage native advertising centrally via a dedicated person or group.



For those centralized via a dedicated person/group, the specific department that the native advertising team or person sits in is most likely to be a digital advertising department or advertising/media group. And the leader of that centralized team is most likely to either be a director of digital or a broader director or VP of advertising/marketing. (Findings here per open-ended questions 11B and 11C.)

The large majority of respondents (71 percent) do not have formal, written, internal editorial guidelines for the development of native advertising. Among the respondents who do not have such guidelines, one-third plan on developing them in the future.



# Detailed Findings

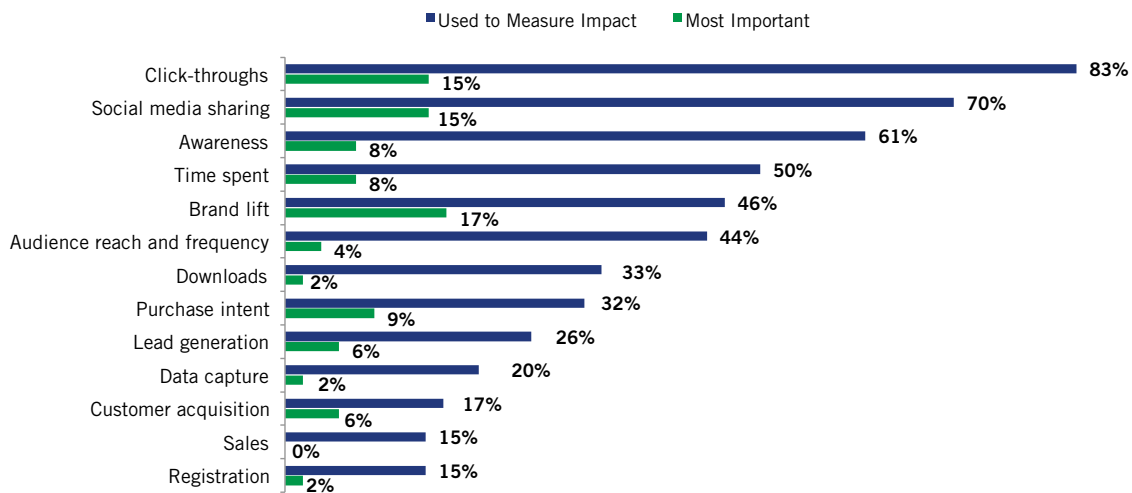
## MEASUREMENT

Measuring the impact of native advertising is a challenge. Multiple metrics are employed, with click-throughs, social media sharing, and awareness having the highest usage. No metric stands out as “most important.”

Perhaps more concerning is that 26 percent of those engaged in native advertising did not even answer this question, which suggests knowledge gaps on native advertising measurement.

### 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.

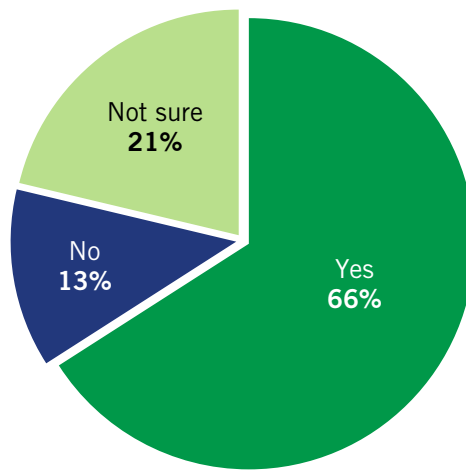
# Detailed Findings

## DISCLOSURE

Two-thirds of respondents agree that native advertising needs clear disclosure that it is indeed advertising. Only 13 percent feel that such disclosure is not needed.

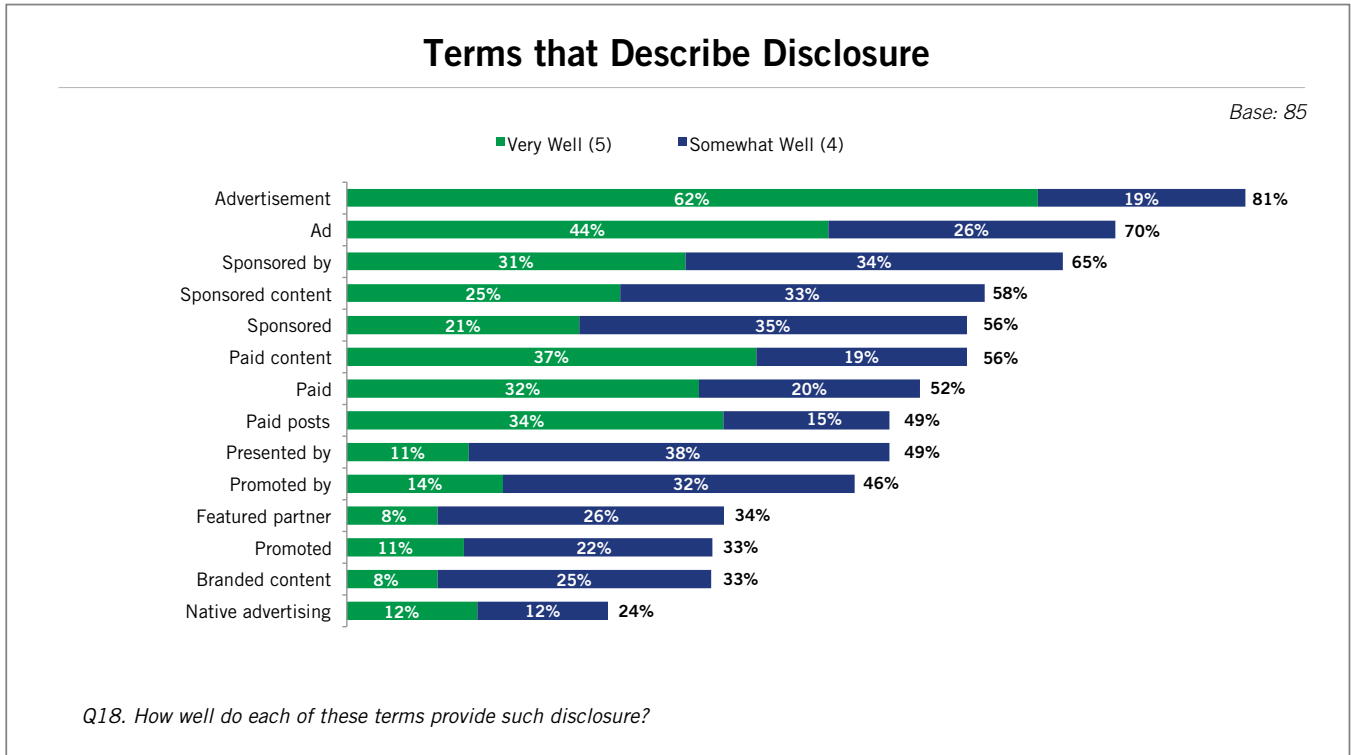
### Need Clear Disclosure for Native Advertising

Base: 94

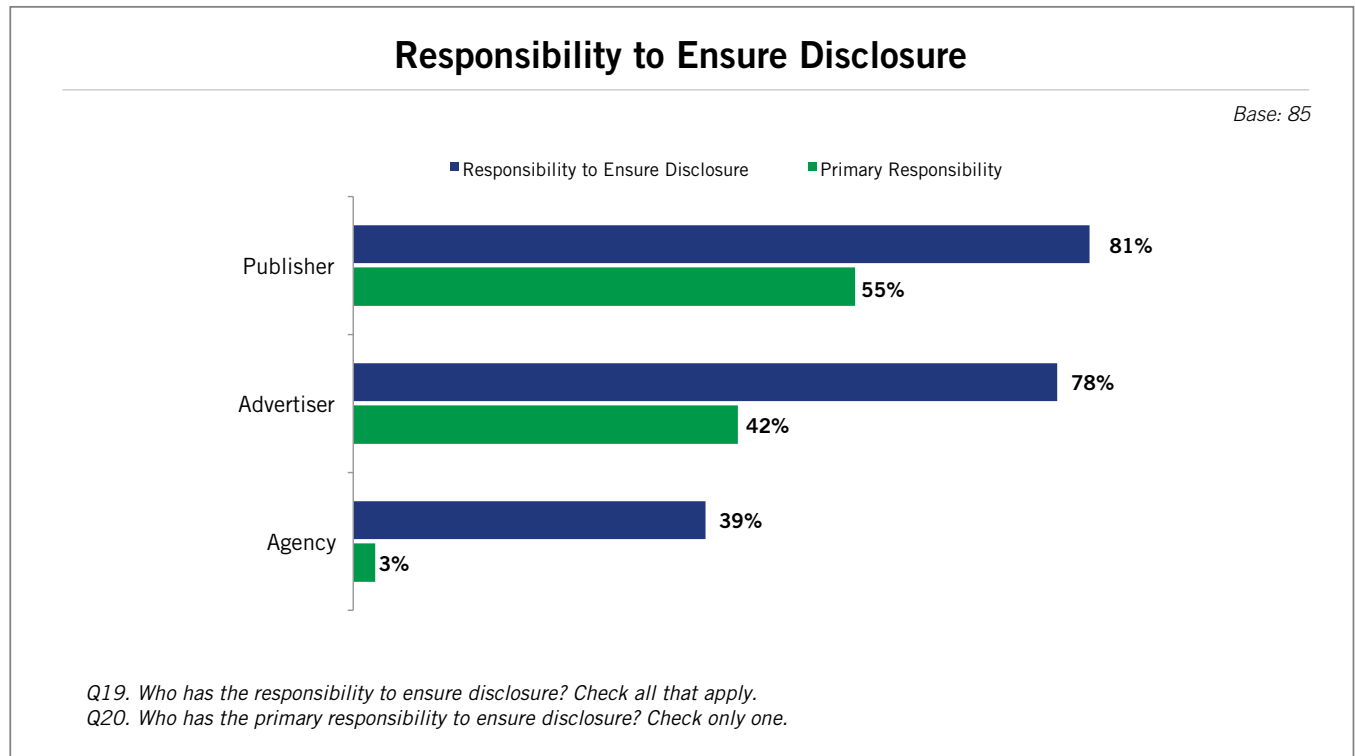


Q17. Does native advertising need clear disclosure that it is indeed advertising?

The survey explored various terms that describe disclosure. While “advertisement” and “ad” were noted by the highest percentage of respondents, a number of other terms also received high top-two-box ratings for disclosure.

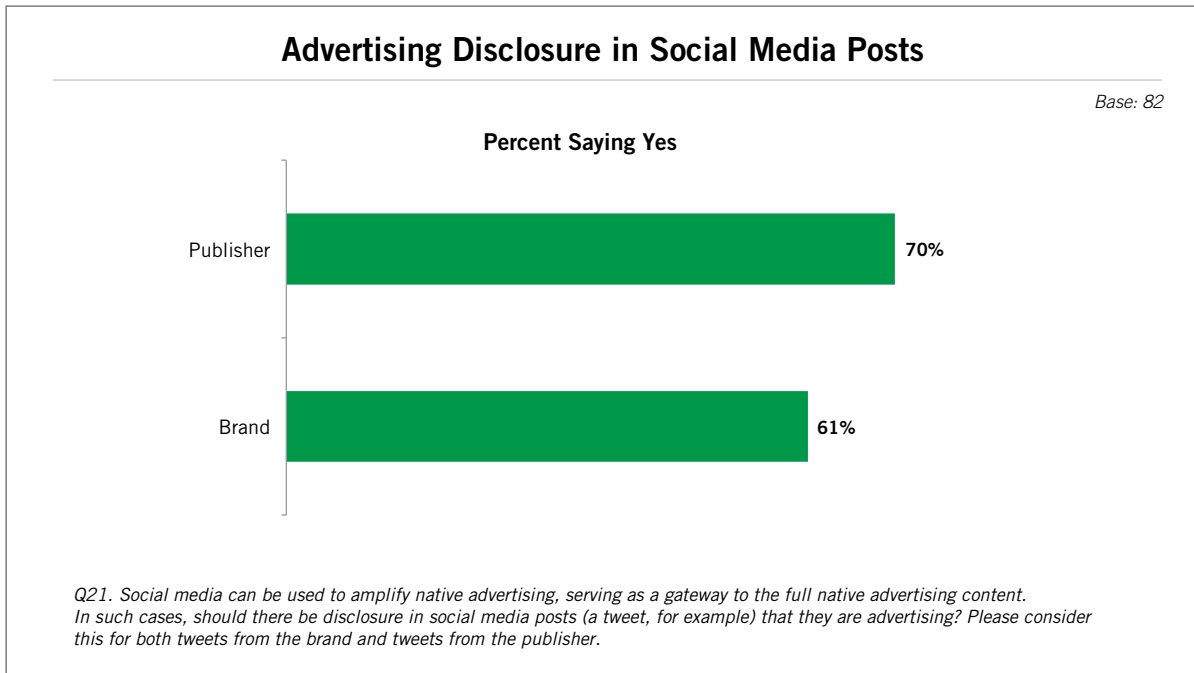


Both the publisher and advertiser have a responsibility to disclose that native advertising content is indeed paid advertising. For the primary responsibility, 55 percent of respondents believe that rests with the publisher and 42 percent believe that the advertiser has primary responsibility.



## Detailed Findings .....

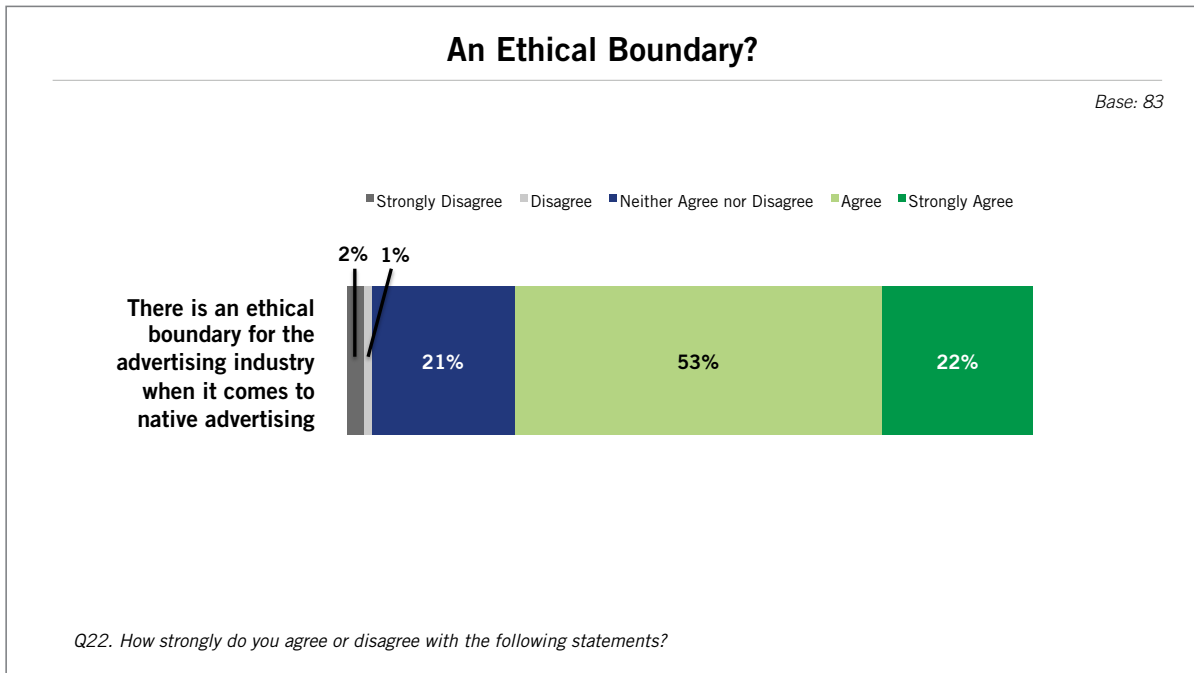
Social media can be used to amplify native advertising, serving as a gateway to the full native advertising content. In such cases, 70 percent of respondents believe that publisher tweets require disclosure that native advertising content is indeed paid advertising, and 61 percent believe that brand tweets require the same.



# Detailed Findings

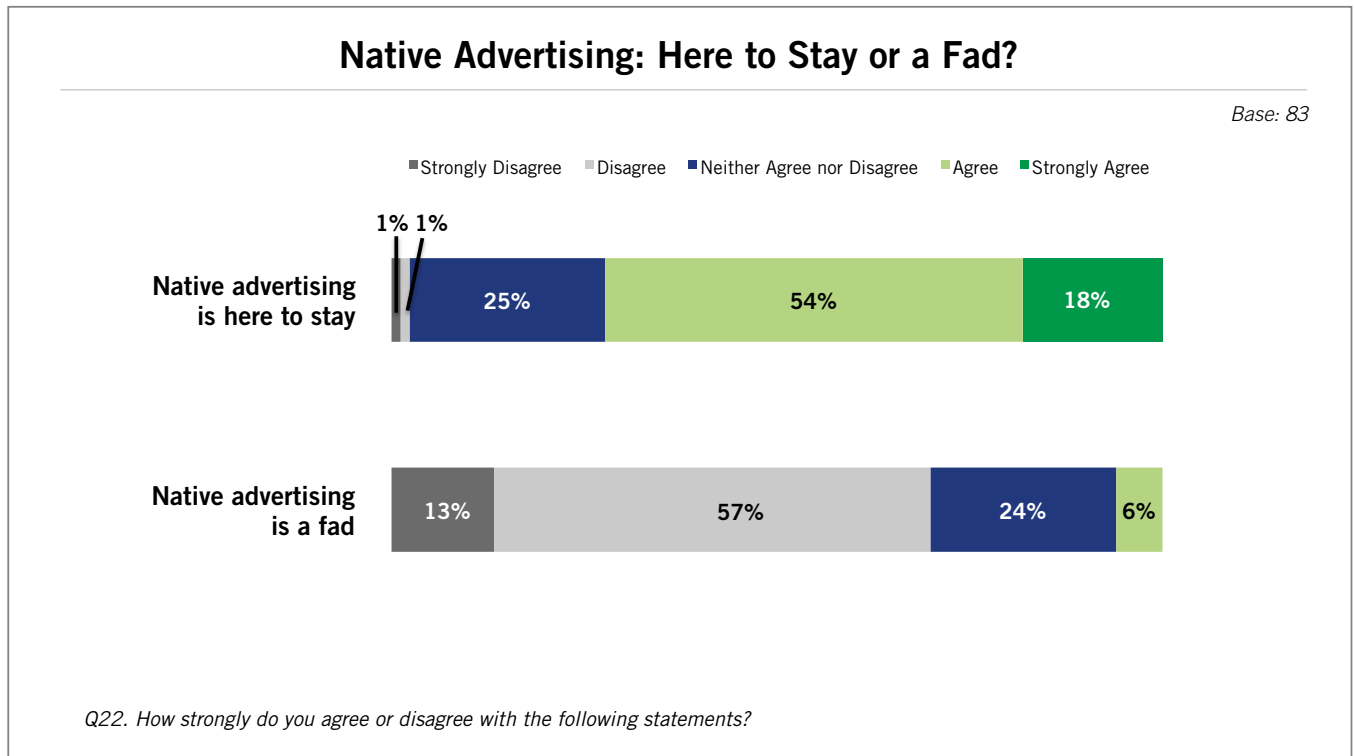
## OTHER POINTS OF INTEREST

When asked whether there is an ethical boundary for the advertising industry when it comes to native advertising, there was 75 percent top-two-box agreement.

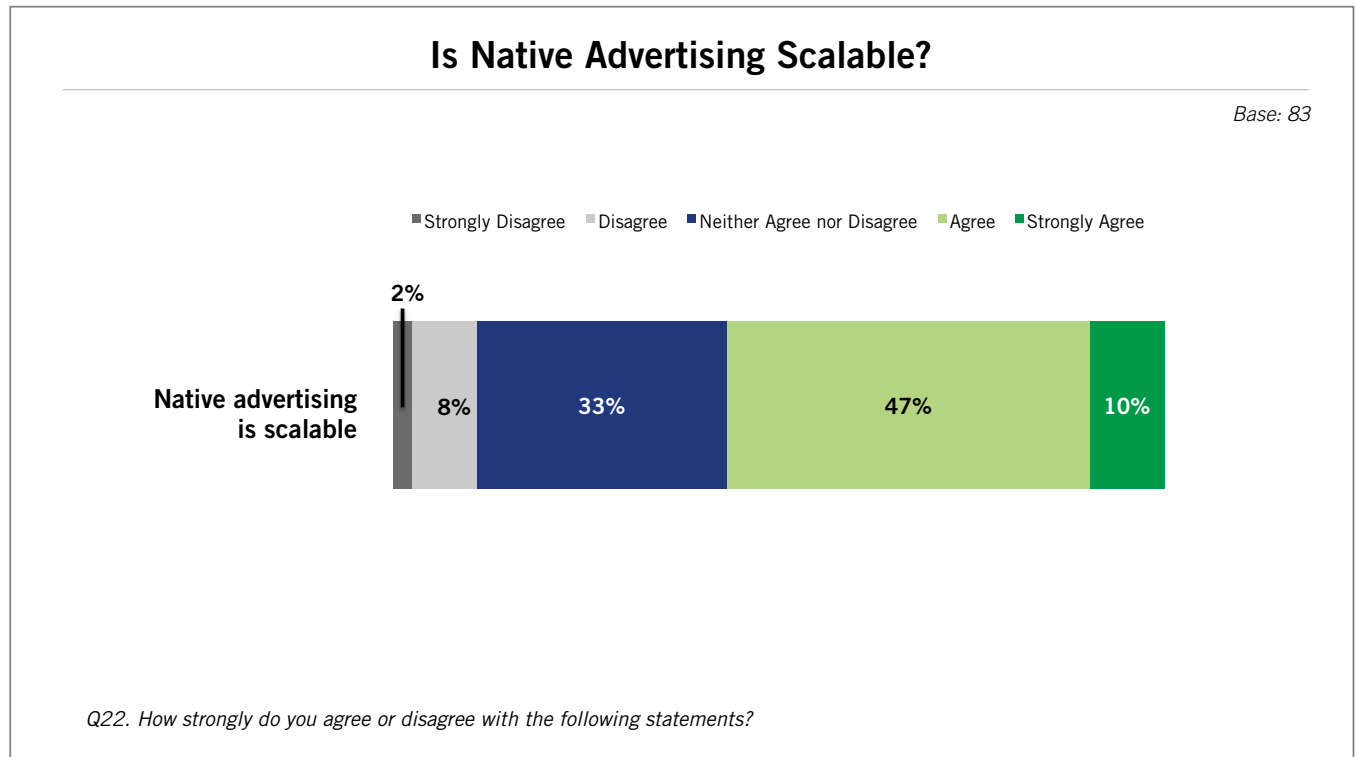




It's clear that survey respondents feel that native advertising is "here to stay" rather than being a "fad."

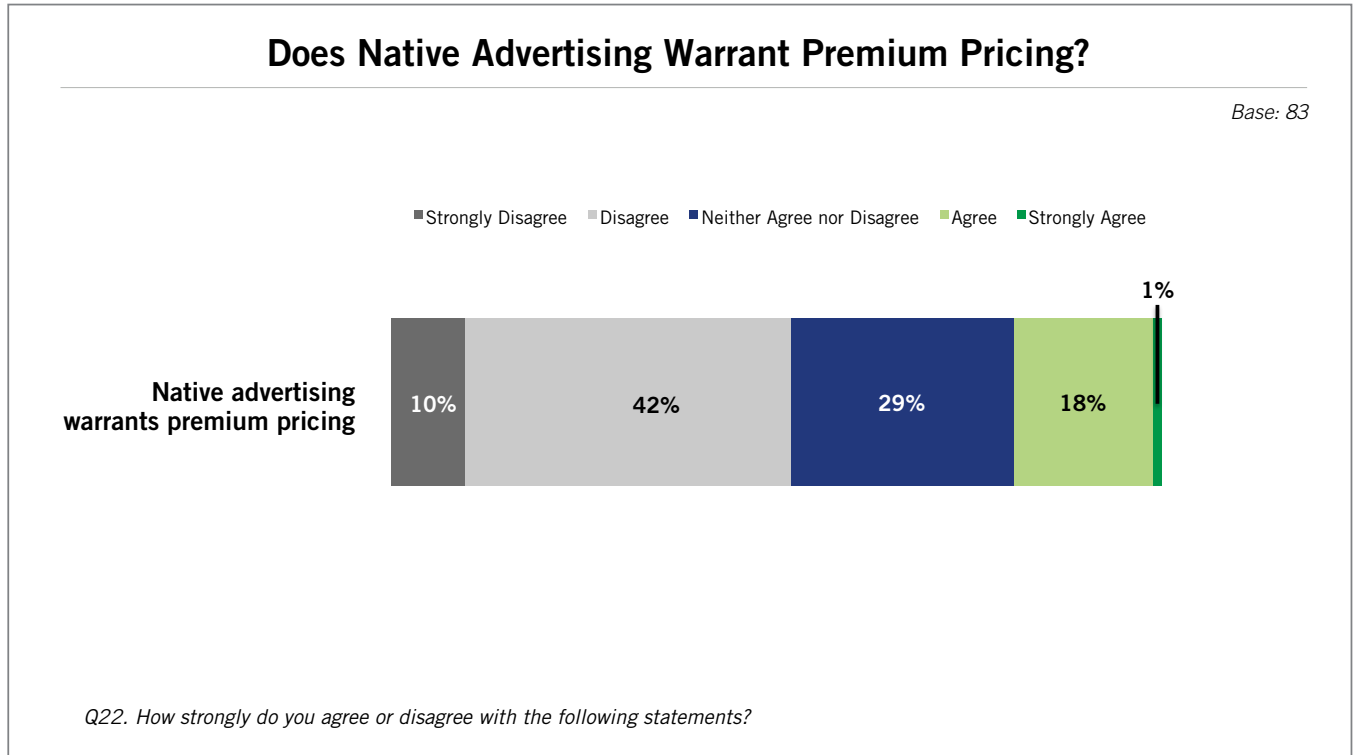


The ability to scale native advertising has been much discussed in the industry. The results of this survey indicate that marketers are not certain that native is scalable (a full one-third neither agree nor disagree), although there is 57 percent top-two-box agreement.



## Detailed Findings

Interestingly, only a small percentage of respondents (19 percent) believe that native advertising warrants premium pricing.



# Detailed Findings

## WHAT KEEPS YOU UP AT NIGHT?

Finally, responses to the open-ended question “What is the single biggest issue about native advertising that keeps you up at night?” revealed disclosure (native advertising content is paid advertising) and transparency (not disguising paid advertising as content) are major concerns. Specific responses included:

- “Clarity to the audience on exactly what is paid for, and whose opinion is reflected in the content.”
- “Disclosure/ethics”
- “Feels dishonest at first glance.”
- “Integrity”
- “It blurs the line between journalism and advertising in an unsettling way. Greater transparency would make me feel better.”
- “It needs to be done ethically, with specific call-outs that it is an advertisement.”
- “Native needs to be transparent and fully disclosed to pre-empt integrity issues.”

Another important issue is content creation, specifically creating content that subscribers of publications want to read.

## ANA Perspective

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 advances the interests of marketers and promotes and protects the well-being of the marketing community. For more information, visit [www.ana.net](http://www.ana.net), follow us on [Twitter](#), or join us on [Facebook](#).

## Additional ANA Resources

Marketers are encouraged to tap into the various resources of the ANA to learn more about the marketing industry:

**ANA Marketing Knowledge Center:** To find articles, toolkits, case studies, and presentations on a range of marketing topics, visit [www.ana.net/mkc](http://www.ana.net/mkc), or to submit a customized information request to our Research Service, visit [www.ana.net/asktheexpert](http://www.ana.net/asktheexpert).

**ANA Survey Research:** ANA surveys are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today. To access survey reports, which allow you to tap into members-only research and perspective, please visit [www.anasurveys.net](http://www.anasurveys.net). To join our survey panel of more than 1,000 marketers and participate in industry leadership please visit [www.ana.net/pulsesurvey](http://www.ana.net/pulsesurvey).

**ANA Insight Briefs:** ANA Insight Briefs are compilations of the ANA's best resources on a given subject. Filled with charts, quotes, and client-side marketer case studies, they provide today's busy marketer with top-line information on the hottest topics in marketing. For more information, please visit [www.ana.net/insightbriefs](http://www.ana.net/insightbriefs).

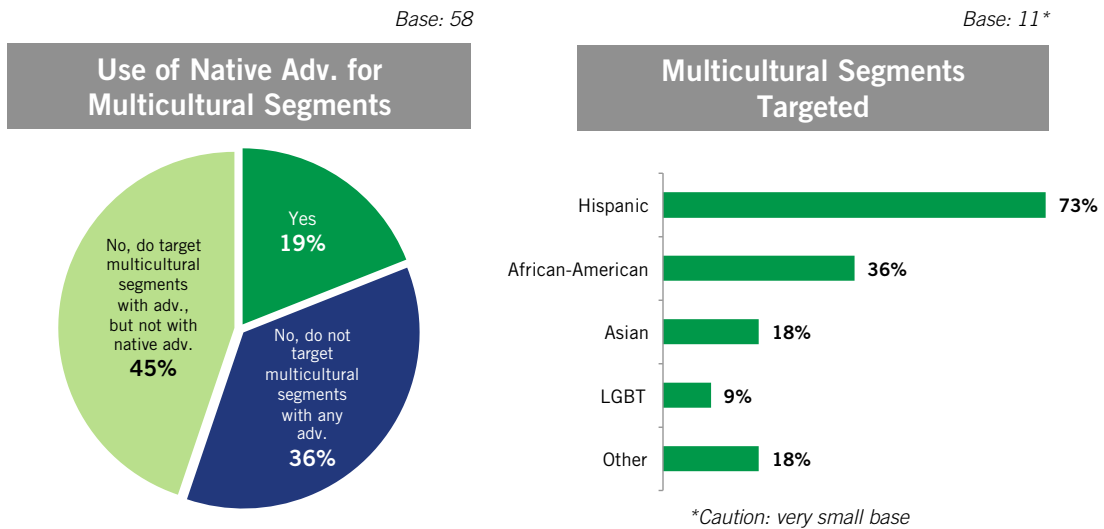
**ANA Committees:** ANA committees offer members a forum for sharing best practices, the opportunity for peer-to-peer networking and benchmarking, and the ability to learn about new industry developments through the exchange of ideas with guest speakers and fellow committee members. ANA committees also often take leadership roles in shaping industry issues. For more on ANA committees, please go to [www.ana.net/committees](http://www.ana.net/committees).

**ANA Conferences:** The ANA helps the marketing community stay abreast of cutting-edge trends and best practices via a comprehensive calendar of national conferences. In addition, the ANA goes on the road to offer members a portfolio of peer-to-peer gatherings that afford opportunities to discuss special needs in a convenient, informal setting. Find more information at [www.ana.net/events](http://www.ana.net/events).

**ANA School of Marketing:** The ANA School of Marketing offers marketers on-site training sessions and full-day classes that help marketers grow as brand builders. Find more information at [www.ana.net/schoolofmarketing](http://www.ana.net/schoolofmarketing).

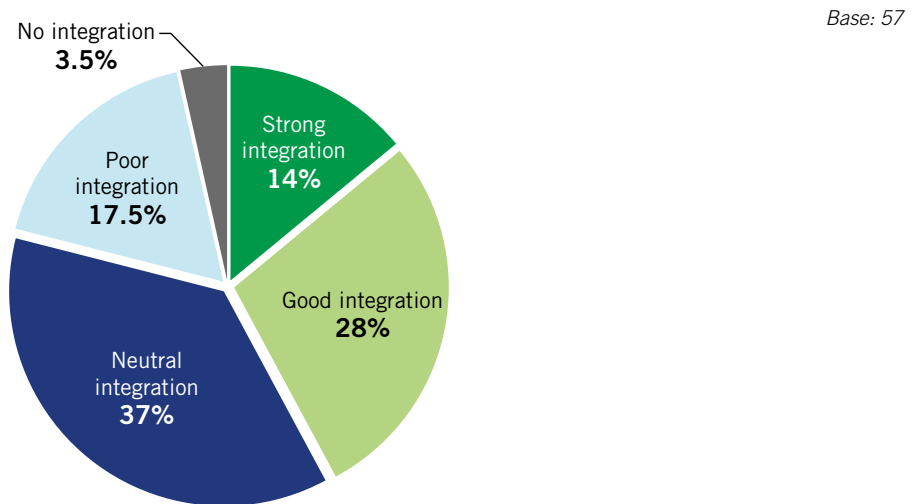
# Appendix A: Additional Data Charts

## Native Advertising with Multicultural Segments



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.

## Native Advertising Integration into Overall Mix



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

## Appendix B: Survey Questionnaire

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

- Yes
- No
- Not sure

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

- One year or less
- Between one and three years
- More than three years

Q1C. Is your company looking to initiate native advertising in the next 12 months?  
(for those not answering “yes” to Q1a)

- Yes
- No
- Not sure

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

- Budgets
- Content considerations (i.e., don't have sufficient content)
- Lack of creative resources
- Limited reach
- Measurement issues
- Not a believer in/fan of native
- Not familiar enough with native
- Not structured internally to support native
- Not scalable
- Too time-intensive
- Transparency concerns (i.e., concerns that paid relationship between brand and media is not sufficiently transparent to consumer)
- Other
- Don't know/Not sure



**Appendix B: Survey Questionnaire** .....

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

- Digital/Online publishers (not including social media sites)
- Outdoor
- Printed magazines
- Printed newspapers
- Radio
- Social media sites
- Television
- Other

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

- Digital/Online publishers (not including social media sites)
- Outdoor
- Printed magazines
- Printed newspapers
- Radio
- Social media sites
- Television
- Other

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

- Smartphones
- Standard desktop/laptop computer
- Tablet

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

- Articles
- Photos
- Video
- Other

**Appendix B: Survey Questionnaire** .....

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

- Yes
- No, we do not target multicultural segments with any of our advertising. [GO TO Q5a]
- No, while we do target multicultural segments with advertising, we have not done so with native advertising. [GO TO Q5A]

[SKIP TO Q5A IF LEFT BLANK]

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

- African-American
- Asian
- Hispanic
- LGBT
- Other

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

- Yes
- No
- Not sure

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

- All
- The majority
- About half
- Less than half

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

- Increased
- Decreased
- Stayed the same

**Appendix B: Survey Questionnaire** .....

- Q7. Approximately what percentage of your overall advertising budget (i.e., media and production) has been allocated to native advertising over the past year?
- 2% or less
  - 3–5%
  - 6–10%
  - 11–20%
  - 21–50%
  - 51–99%
  - 100%
- Q8. In the next year, do you expect your budget allocated to native advertising to increase, decrease, or stay the same?
- Increase
  - Decrease
  - Stay the same
- Q9. What types of external resources help manage your native advertising? Check all that apply.
- Media agency(ies)
  - Creative agency(ies)
  - Public relations agency(ies)
  - Specialized digital agency(ies)
  - Content marketing agency(ies)
  - Media owner(s)/publisher(s)
  - Other \_\_\_\_\_
  - We do not use external agency resources.
- Q10. Thinking about those external resources, which partner is most valuable in helping to manage your native advertising? Check only one.
- Media agency(ies)
  - Creative agency(ies)
  - Public relations agency(ies)
  - Specialized digital agency(ies)
  - Content marketing agency(ies)
  - Media owner(s)/publisher(s)



**Appendix B: Survey Questionnaire** .....

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

- Centralized: via a dedicated person/group
- Decentralized: with responsibilities handled by individual teams
- Hybrid: combination of centralized and decentralized

Q11B. In what specific department does the native advertising team/person sit?

\_\_\_\_\_

Q11C. And who leads that team? Please be specific with the title.

\_\_\_\_\_

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

- Strong integration
- Good integration
- Neutral integration
- Poor integration
- No integration

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

- Yes
- No
- Not sure

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

- Yes
- No
- Not sure

**Appendix B: Survey Questionnaire** .....

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

- Audience reach and frequency
- Awareness
- Brand lift
- Click-throughs
- Customer acquisition
- Data capture
- Downloads
- Lead generation
- Purchase intent
- Registration
- Sales
- Social media sharing
- Time spent
- Other \_\_\_\_\_

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

- Audience reach and frequency
- Awareness
- Brand lift
- Click-throughs
- Customer acquisition
- Data capture
- Downloads
- Lead generation
- Purchase intent
- Registration
- Sales
- Social media sharing
- Time spent

**Appendix B: Survey Questionnaire** .....

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

	Not at all important	Unimportant	Neither important nor unimportant	Important	Very important
Native ad is placed within page/program editorial content					
Native ad format looks like surrounding editorial content					
Upon interaction, native ad behaves like surrounding editorial content					
Native ad is contextually relevant to the surrounding editorial content					

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

- Yes
- No
- Not sure

**Q18.** How well do each of the terms below provide such disclosure?

	1 — Not at all well	2	3	4	5 — Very well
Ad					
Advertisement					
Branded content					
Featured partner					
Native advertising					
Paid					
Paid content					
Paid posts					
Presented by					
Promoted					
Promoted by					
Sponsored					
Sponsored by					
Sponsored content					



**Appendix B: Survey Questionnaire** .....

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

- Advertiser
- Agency
- Publisher

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

- Advertiser
- Agency
- Publisher

**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.

	Brand	Publisher
Yes		
No		
Not sure		

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

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Native advertising is scalable					
Native advertising warrants premium pricing					
There is an ethical boundary for the advertising industry when it comes to native advertising					
Native advertising is a fad					
Native advertising is here to stay					

**Appendix B: Survey Questionnaire** .....

Q23. Please describe in a sentence the benefit that native advertising provides.

\_\_\_\_\_  
\_\_\_\_\_

Q24. What is the single biggest issue about native advertising that “keeps you up at night?”

\_\_\_\_\_  
\_\_\_\_\_

Q25. Do you have any other comments about native advertising?

\_\_\_\_\_  
\_\_\_\_\_





ABOUT THE RESPONDENTS

1. Is your primary business B-to-B or B-to-C? (Please select one response only.)
  - B-to-B
  - B-to-C
  - Both
  
2. What is your job level? (Please select one response only.)
  - CEO/President
  - Chief Marketing Officer
  - Executive Vice President
  - Senior Vice President
  - Vice President
  - Director
  - Brand or Product Manager
  - Associate Brand or Product Manager
  - Manager
  - Assistant Manager
  - Other (please specify) \_\_\_\_\_
  
3. How many years have you personally been working in marketing/advertising?
  - Less than one year
  - 1 to less than 2 years
  - 2 to less than 5 years
  - 5 to less than 7 years
  - 7 to less than 10 years
  - 10 to less than 15 years
  - 15 to less than 20 years
  - 20 to less than 25 years
  - 25 to less than 30 years
  - 30 years or more

Thank you for your participation in the ANA Native Advertising Survey!



# ADVERTISING IS GOING NATIVE



Native ad formats match both the form and function of the user experience in which they are placed.