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The State of Online Advertising

New insights into the beliefs of consumers and professional marketers

October 2012

Adobe

Methodology

Research firm Edelman Berland conducted an online survey of 1,250 adults, 18 years or older, including 1,000 general population and 250 Marketing Decision Makers, each in the U.S.

Interviewing took place from October 8th –16th, 2012.

The margin of sampling error at the 95% confidence level is as follows:

- U.S. (n=1,000): MOE = ± 3%
- U.S. (n=250): MOE = ± 6%

Additionally, this survey will be fielded in the following countries:

- UK
- Japan
- China

The data set for each country is nationally representative of the population of that country.
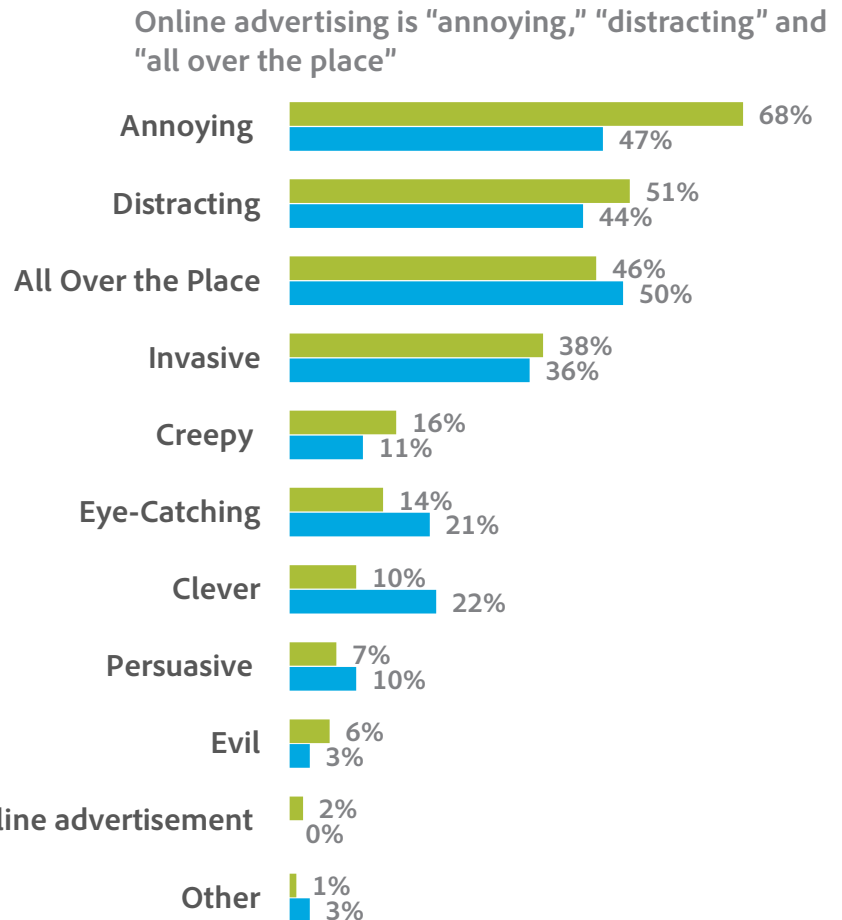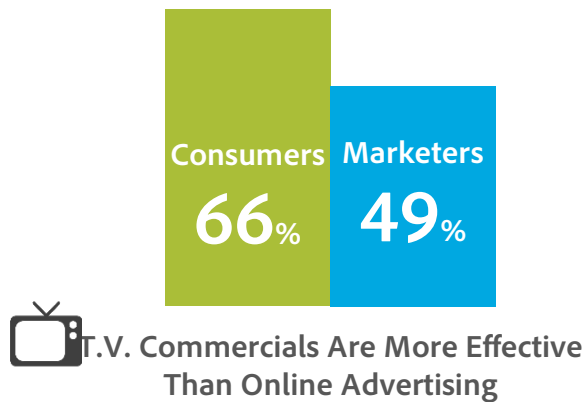
Summary of Key Findings

1 Print magazines and while watching a favorite TV show are the two most preferred places to look at an ad

2 Majority of respondents use social media; over half have liked on behalf of their favorite brands, but also wish there was a dislike button for social media

3 68% of consumers find online ads "annoying" and "distracting" and 54% say online banner ads don't work

4 "Likes" get attention encourage consumers to "check out" a product, but doesn't translate to sales

5 44% of consumers feel advertising works better on women than men

6 Consumers and marketing professionals agree that marketing is valued, strategic to business and paramount to driving sales

7 Professional advertising is the most effective form of advertising, 27% of marketers believe that user-generated content is the most popular form of online advertising

8 Advertising/Marketing professionals considered in the bottom professions among consumers – along with actors and dancers; not highly regarded by marketing professionals either

9 Most marketing is a bunch of B.S., 53% agree

Majority of consumers and marketers believe television commercials are more important than online advertising

Online Advertising: Effectiveness & Descriptions

■ **Consumers**   ■ **Marketers**

T.V. More Important Than Online

Consumers **66**%

Marketers **49**%

T.V. Commercials Are More Effective Than Online Advertising

Online advertising is "annoying," "distracting" and "all over the place"

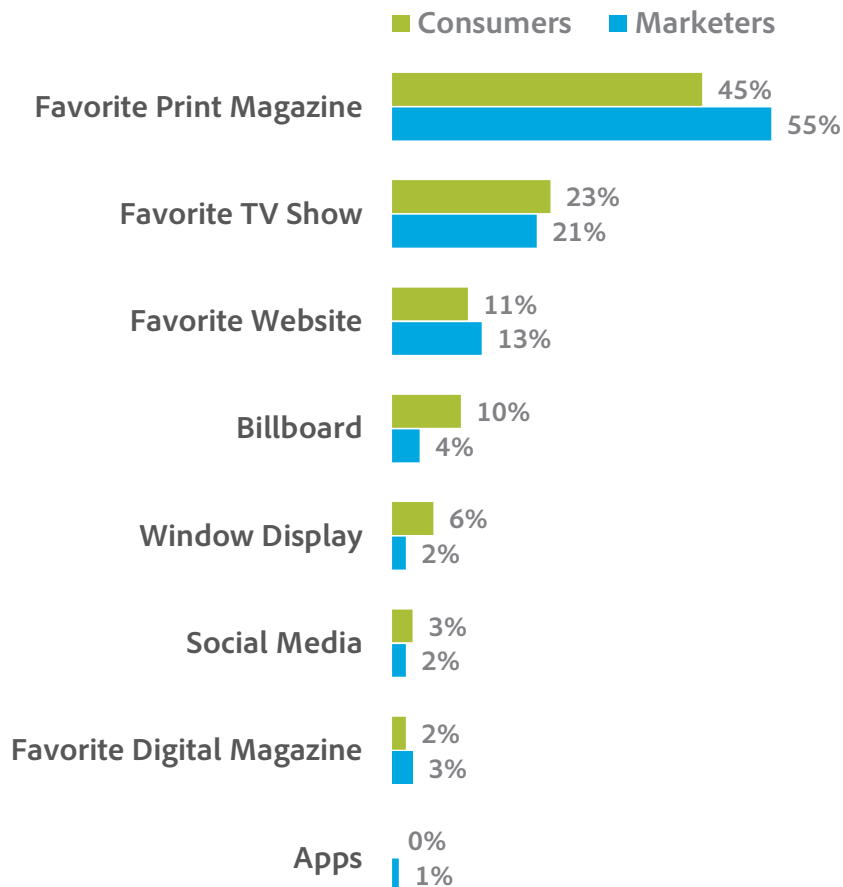| Description	Consumers	Marketers
Annoying	68%	47%
Distracting	51%	44%
All Over the Place	46%	50%
Invasive	38%	36%
Creepy	16%	11%
Eye-Catching	14%	21%
Clever	10%	22%
Persuasive	7%	10%
Evil	6%	3%
Never seen an online advertisement	2%	0%
Other	1%	3%

Q8. Please rate each of the following statements based on whether you agree or disagree. *All potential responses included in appendix
Q46. Which of the following adjectives would you use to describe online advertising? (select all)

Print magazines and while watching a favorite TV show are the two most preferred places to look at an ad

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Favorite Print Magazines and Favorite TV shows are the two most preferred

ONLY

31%

OF CONSUMERS ENJOY READING AND VIEWING ADVERTISEMENTS

■ Consumers ■ Marketers

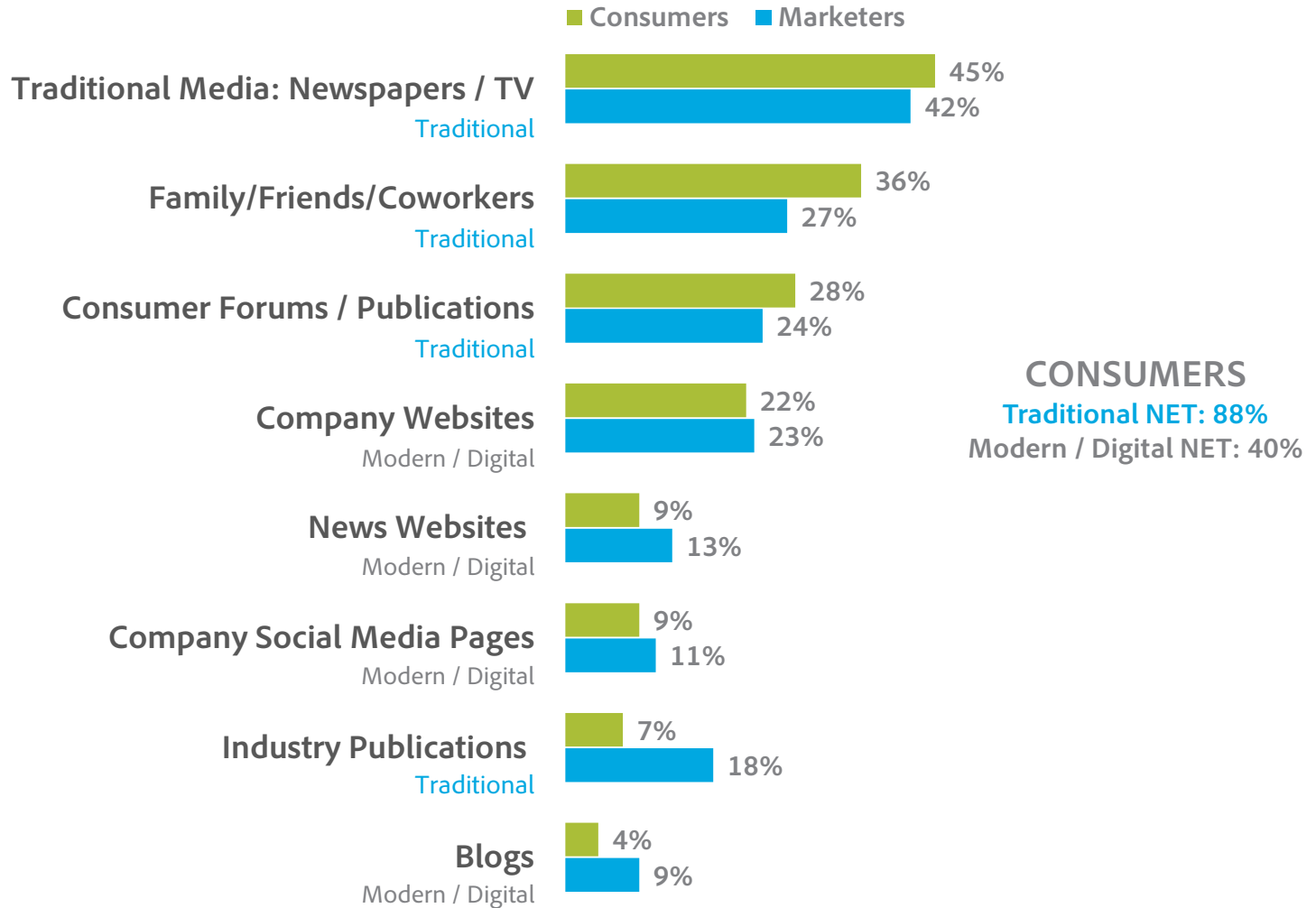|	Consumers	Marketers
Favorite Print Magazine	45%	55%
Favorite TV Show	23%	21%
Favorite Website	11%	13%
Billboard	10%	4%
Window Display	6%	2%
Social Media	3%	2%
Favorite Digital Magazine	2%	3%
Apps	0%	1%

Q30. Where do you prefer to look at an ad?
Q38 Do you enjoy viewing / reading advertisements?

Traditional media is considered to be the best for marketing and advertising

Best for marketing and advertising

■ Consumers ■ Marketers

Traditional Media: Newspapers / TV
Traditional
- Consumers: 45%
- Marketers: 42%

Family/Friends/Coworkers
Traditional
- Consumers: 36%
- Marketers: 27%

Consumer Forums / Publications
Traditional
- Consumers: 28%
- Marketers: 24%

Company Websites
Modern / Digital
- Consumers: 22%
- Marketers: 23%

News Websites
Modern / Digital
- Consumers: 9%
- Marketers: 13%

Company Social Media Pages
Modern / Digital
- Consumers: 9%
- Marketers: 11%

Industry Publications
Traditional
- Consumers: 7%
- Marketers: 18%

Blogs
Modern / Digital
- Consumers: 4%
- Marketers: 9%

CONSUMERS
Traditional NET: 88%
Modern / Digital NET: 40%
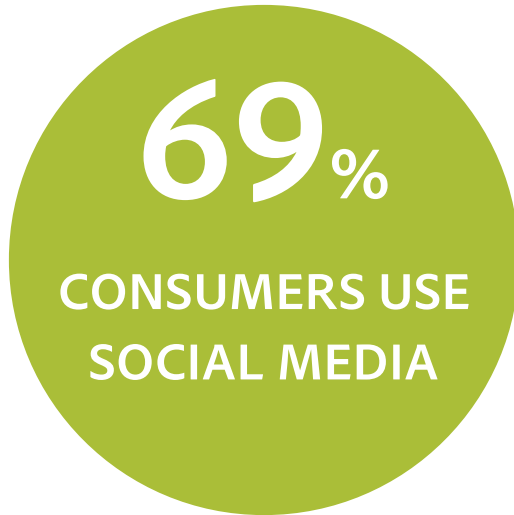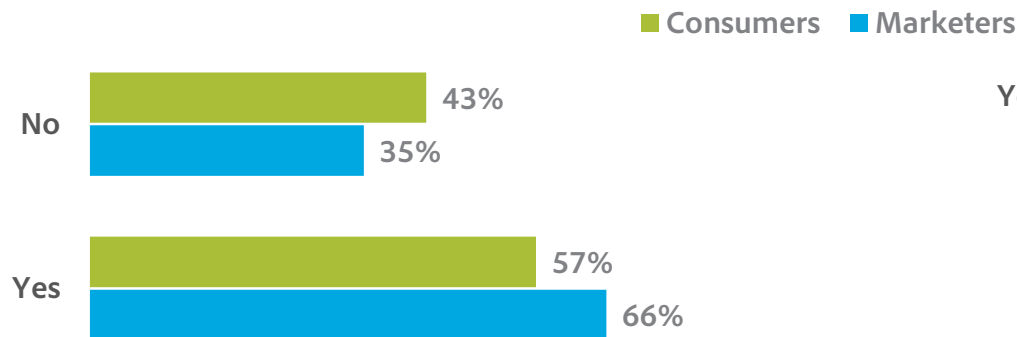
Q40. Which source is best for marketing and advertising? (select up to 2)

Majority of respondents use social media; over half have liked on behalf of their favorite brands, but also wish there was a dislike button for social media

Social Media – Likes and Dislikes

69%
CONSUMERS USE SOCIAL MEDIA

83%
MARKETERS USE SOCIAL MEDIA

Have you ever "liked" something on social media on behalf of a brand or product you enjoy?

Do you wish there was a dislike button on social media sites?

■ Consumers ■ Marketers

No
- Consumers: 43%
- Marketers: 35%

Yes
- Consumers: 57%
- Marketers: 66%

Yes, very much
- Consumers: 53%
- Marketers: 54%

Don't care
- Consumers: 43%
- Marketers: 40%
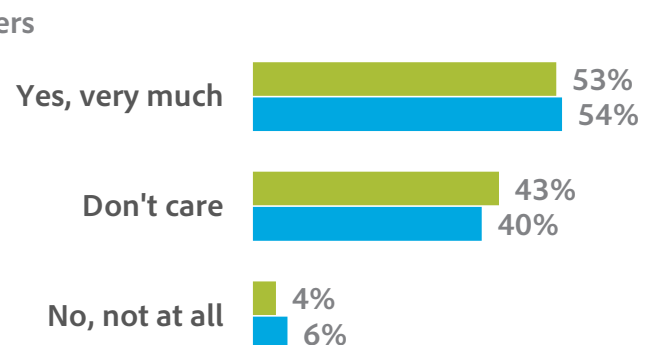
No, not at all
- Consumers: 4%
- Marketers: 6%

Q17. Do you use social media?
Q20. Have you ever "liked" something on social media on behalf of a brand or product you enjoy?
Q21. Do you wish there was a dislike button on social media sites?

Consumers and marketers feel online advertising is effective; but consumers don't want banner ads

Online Advertising Effectiveness

For Consumers: Online Advertising Is Effective In The Right Taste; Just Not Web Ads

Online Advertising Is Not Effective

Consumers 30%

Marketers 16%

Web Banner Advertisements Do Not Work

Consumers 54%

Marketers 33%

Q8. Please rate each of the following statements based on whether you agree or disagree.

While "likes" may ignite product engagement, opportunity still exists to translate this to purchasing power

Which of the following would you do if you saw your friend like a product on social media or social networking site?

Consumers

Response	%
None	35%
Check out the product	29%
I do not visit social networking sites	20%
Visit the product's website	14%
Visit the product's social media page	11%
Other	6%
Like' the product	5%
'Comment' on the product	4%
Hide that person from your social media newsfeed	2%
Recommend the product to others	2%
Purchase the product	2%
De-friend that person on social media	1%
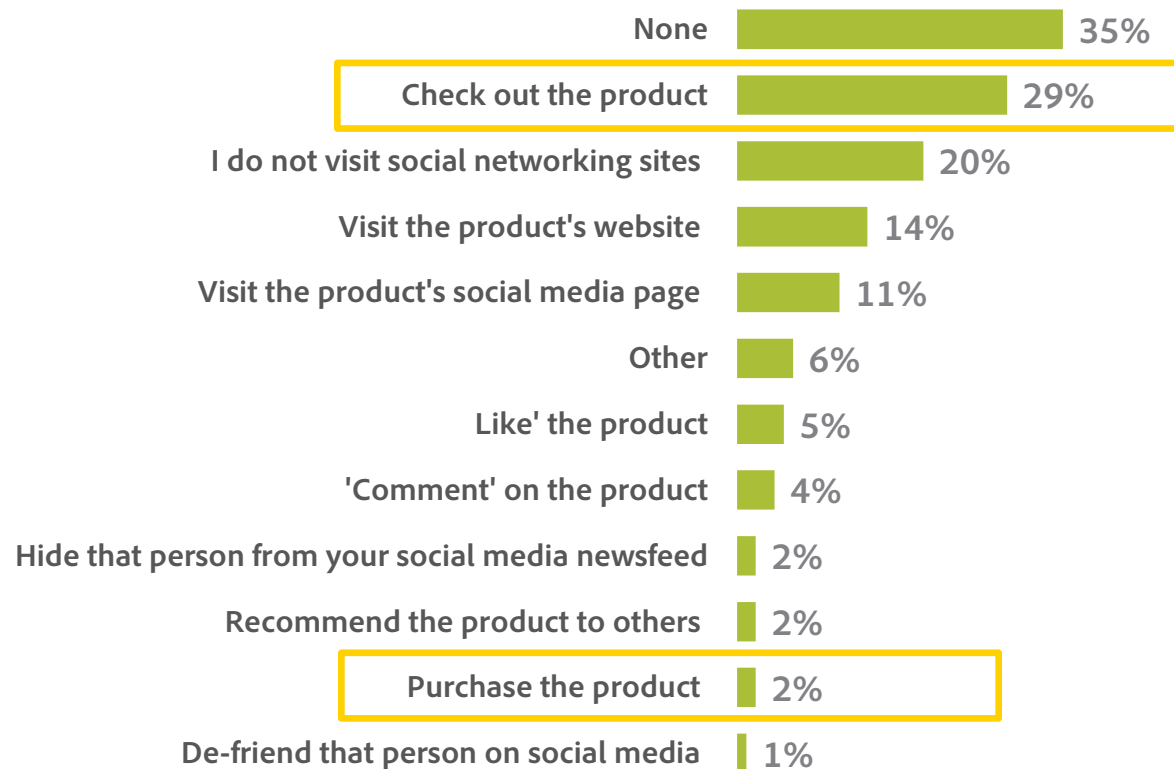
Q25. Which of the following would you do if you saw your friend like a product on social media or a social networking site? (multiple responses)

Consumers and marketers feel advertising works better on women than men

Deconstructing Marketing
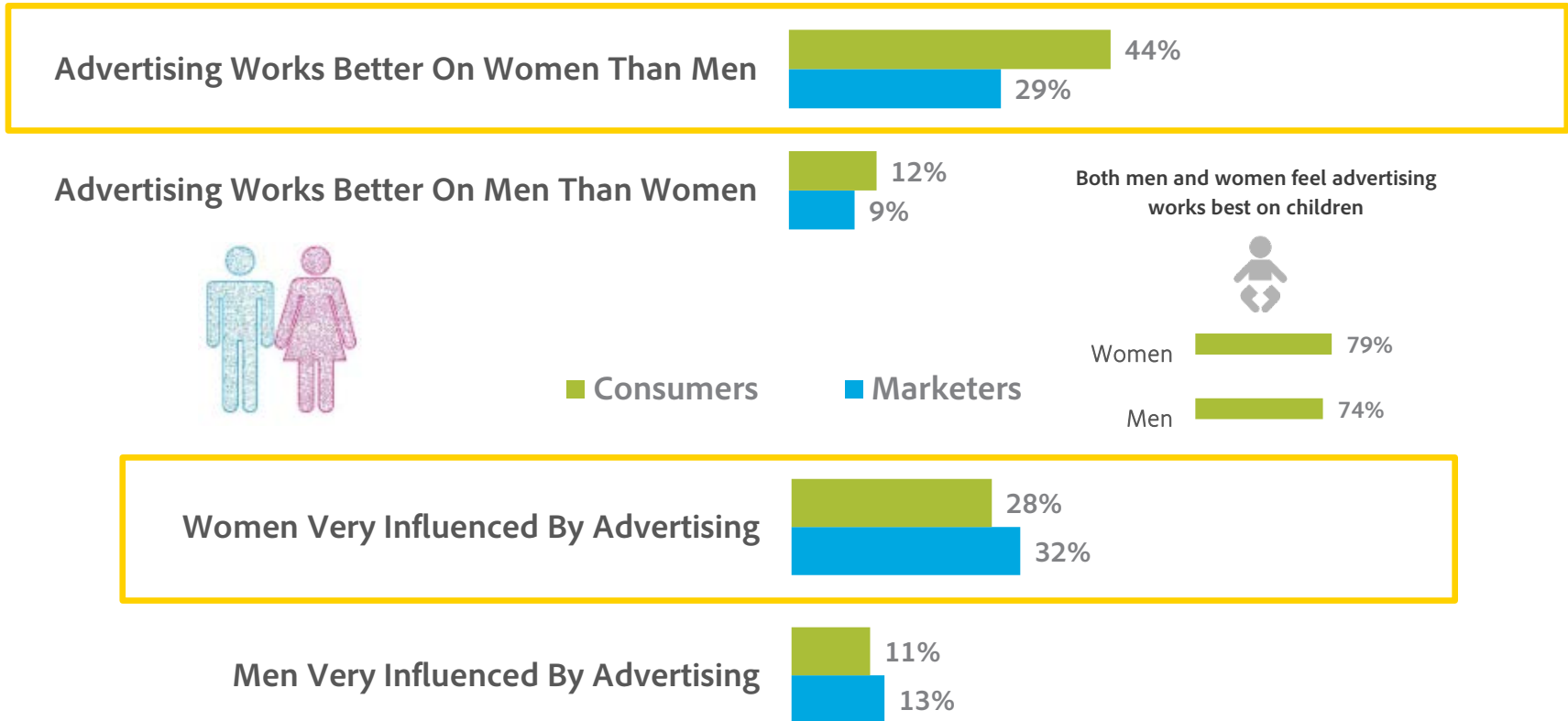
Advertising Works Better On Women Than Men
- 44%
- 29%

Advertising Works Better On Men Than Women
- 12%
- 9%

Both men and women feel advertising works best on children

Women 79%
Men 74%

■ **Consumers** ■ **Marketers**

Women Very Influenced By Advertising
- 28%
- 32%

Men Very Influenced By Advertising
- 11%
- 13%

Q8. Please rate each of the following statements based on whether you agree or disagree. *All potential responses included in appendix
Q10. To what extent do you think each of the following consumer groups is influenced by advertising? Top Box Very Influenced

Marketing is strategic, and heavily contributes to sales impact
Best for Business

■ Consumers   ■ Marketers

Is marketing strategic?
- 94%
- 98%

Does marketing drive sales?
- 94%
- 99%

Does marketing create brands?
- 76%
- 93%

Should marketing define future products?
- 46%
- 67%
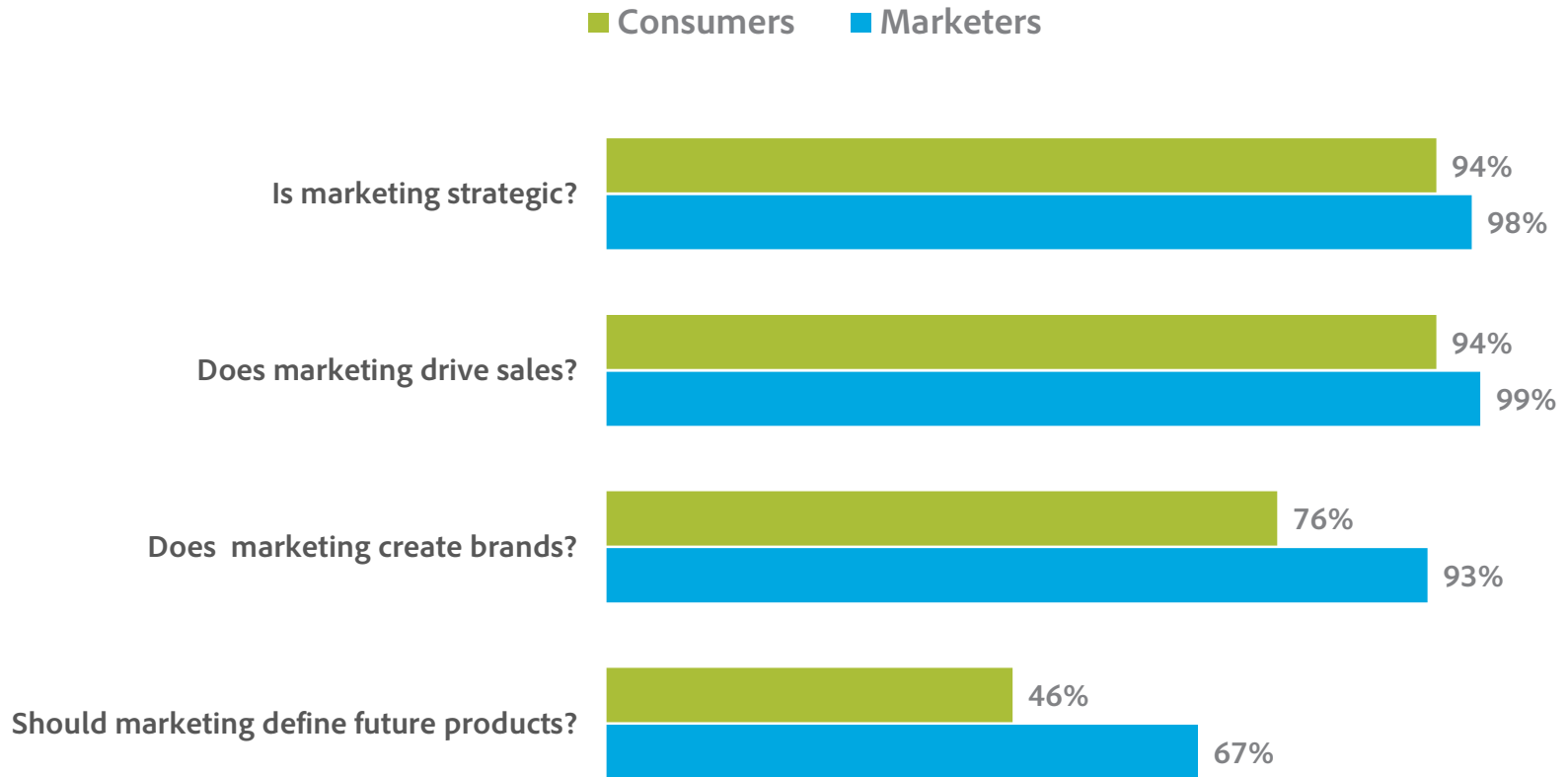
Q13. Is marketing strategic? Q14. Does marketing drive sales? Q15. Does marketing create brands? Q16. Should marketing define future products?

While professional advertising is the most effective form of advertising, user-generated content is increasingly appealing

Deconstructing Marketing

Consumers **Marketers**

Advertising Created By Professional Marketers
- Consumers: 36%
- Marketers: 49%

Consumer/User-Generated Content
- Consumers: 28%
- Marketers: 27%

Rise of User-Generated Content

There are no good ads
- Consumers: 11%
- Marketers: 1%

Social Media Endorsements
- Consumers: 7%
- Marketers: 7%

Outdoor/out-of-home advertising
- Consumers: 6%
- Marketers: 3%

There are no effective ads
- Consumers: 6%
- Marketers: 1%

Email Marketing
- Consumers: 4%
- Marketers: 5%

Paid Search Listings
- Consumers: 3%
- Marketers: 7%

Q12. Which type of promotion is most effective? (please select one response)

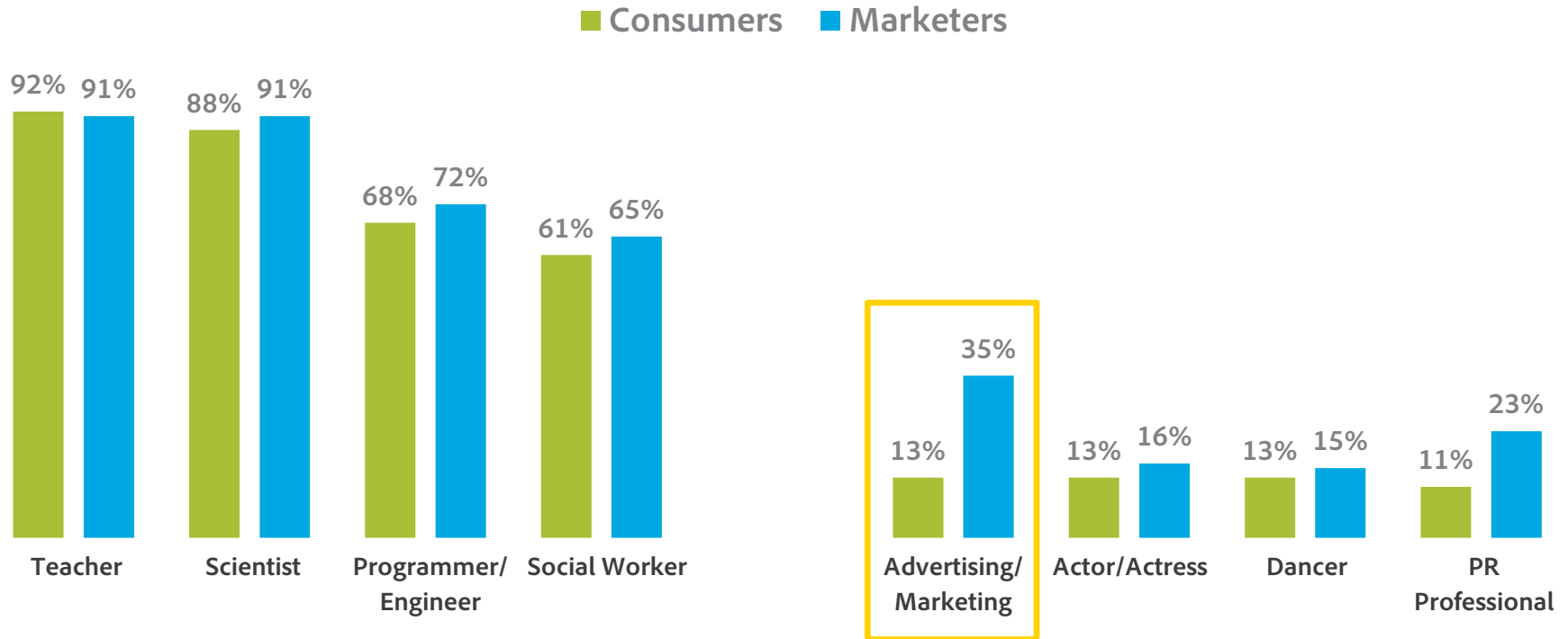# Advertising/Marketing considered bottom four to consumers; not highly regarded by Marketing Professionals either

Professions Valuable to Society

■ Consumers ■ Marketers

Top 4 Professions Most Valuable to Society

Profession	Consumers	Marketers
Teacher	92%	91%
Scientist	88%	91%
Programmer/Engineer	68%	72%
Social Worker	61%	65%

Least 4 Valuable Professions to Society
*Consumer emphasis

Profession	Consumers	Marketers
Advertising/Marketing	13%	35%
Actor/Actress	13%	16%
Dancer	13%	15%
PR Professional	11%	23%

Q1. Which profession provides the most value to society? Top 2 Box – 4,5 (not depicted: Graphic Designer, Artist, Writer, Singer, Politician, Lawyer, Banker, Cleaner, Chef, Architect)

Consumers want to be told a story
Agreed

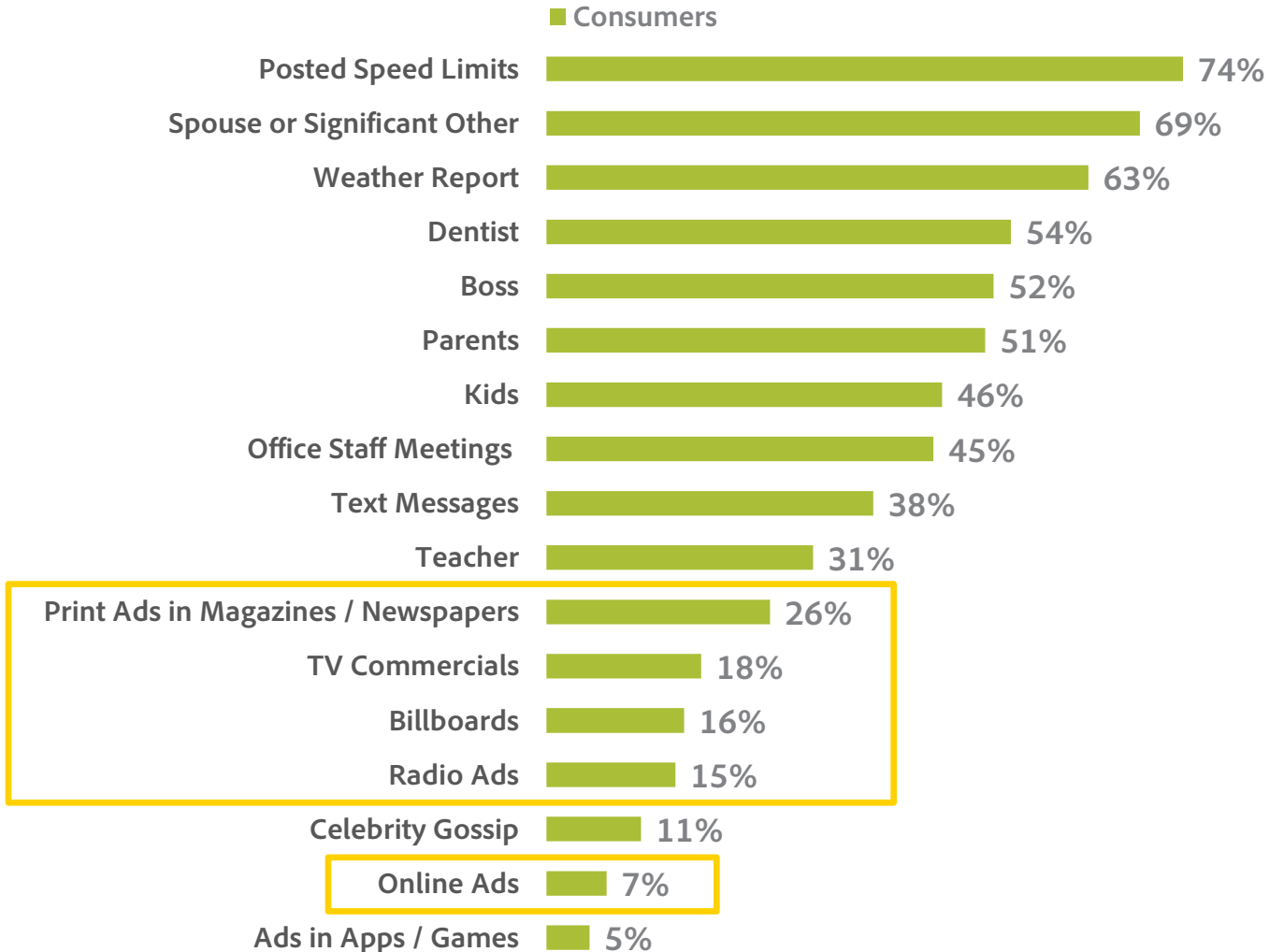| Statement	Percentage
Advertisements should tell a unique story, not just try to sell	73%
A video is worth 1,000 words	67%
User product reviews are the best source of truth	67%
In-Store experiences trump online experiences	67%
Television commercials are more effective than online...	66%
People buy what celebrities wear / like	57%
The Super Bowl is the best advertising opportunity of the year	57%
Web Banner advertisements do not work	54%
Most marketing is a bunch of B.S.	53%
Beautiful advertising is more effective	51%
Online advertising is creepy and stalks you	46%
Advertising works better on women than on men	44%
Online advertising isn't effective	30%
No one watches TV commercials anymore	27%
All "likes" are good in social media	22%
Every brand needs a funny viral video	19%
Advertising works better on men than women	12%

Q8 Please rate each of the following statements based on whether you agree or disagree:

Consumers pay far less attention to ads than they do the speed limit

Attention

■ Consumers

Category	Percentage
Posted Speed Limits	74%
Spouse or Significant Other	69%
Weather Report	63%
Dentist	54%
Boss	52%
Parents	51%
Kids	46%
Office Staff Meetings	45%
Text Messages	38%
Teacher	31%
Print Ads in Magazines / Newspapers	26%
TV Commercials	18%
Billboards	16%
Radio Ads	15%
Celebrity Gossip	11%
Online Ads	7%
Ads in Apps / Games	5%

Q43. One a scale of 1-5 where 5 is full undivided attention and 1 is no attention at all, how much attention do you pay to each of the following? Top 2 Box 4,5