2024 Annual Marketing Report

Maximizing ROI in a fragmented media world

Nielsen

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Four themes from Nielsen's 2024 global marketer survey

In 2023, the world braced for a recession. One never fully materialized, but that didn't stop budgets getting slashed and significant layoffs across nearly every sector. While this year may be poised for more of the same, global marketers are staying optimistic.

Many are leaning hard into performance marketing and digital platforms to help them deliver quantifiable results for their businesses. These channels are made all the more appealing with programmatic-style, automated ad buying based on audiences that can be measured, and often optimized, in real time. But, a healthy media mix is a balanced one. And striking the right balance requires a cross-media approach, continuous tailoring and measuring across the full marketing funnel.

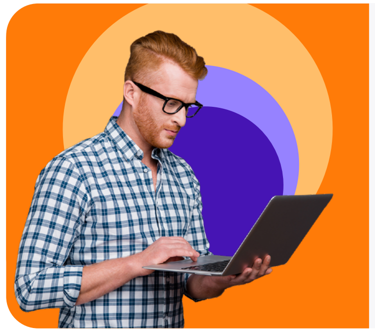
This year's edition of the Nielsen Annual Marketing Report explores how global marketers are allocating budgets and measuring success—all with an eye on proving and improving the ROI of their efforts. By studying their priorities and plans, we've developed recommendations to sharpen your own ROI strategies for 2024 and beyond.

Based on findings from our global marketer survey, we identified four consistent themes.

1. Spending optimism is up

Despite inflation, slowed consumer spending and supply chain uncertainties, 72% of global marketers expect bigger ad budgets this year, up from 64% last year.

*In **section 1**, we explore how the perceived effectiveness of digital channels is lifting marketers' spirits and influencing their budgets.*



2. Marketing tactics and KPIs are misaligned

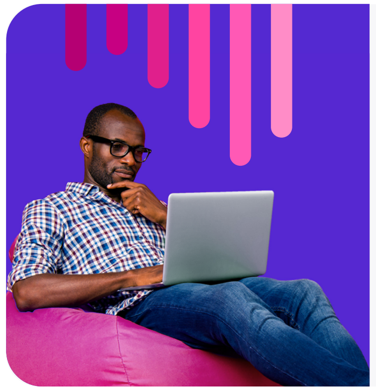
Marketers' top KPIs are long-term and full-funnel ROI. However, 70% plan to prioritize performance marketing over brand-building initiatives.

*In **section 2**, we look at how conversion-focused marketing stacks up against long-term KPIs.*

3. Digital dominance may hurt holistic returns

With nearly two-thirds of media budgets going toward digital and performance channels, marketers may not be able to achieve the holistic returns they're looking for.

*In **section 3**, we dive into channel nuances to understand how they work together to deliver on comprehensive campaign goals.*



4. Measurement confidence is high, but incomplete

84% of global marketers say they're either extremely or very confident in their ROI measurement capabilities, up from 69% in 2023. But only 38% say they evaluate the holistic ROI of their marketing efforts by measuring traditional and digital marketing together.

*In **section 4**, we uncover the disconnect between marketer's confidence and their execution of full-funnel measurement across channels.*

1

Spending optimism

Ad spend is up and earmarked for ‘effective’ channels

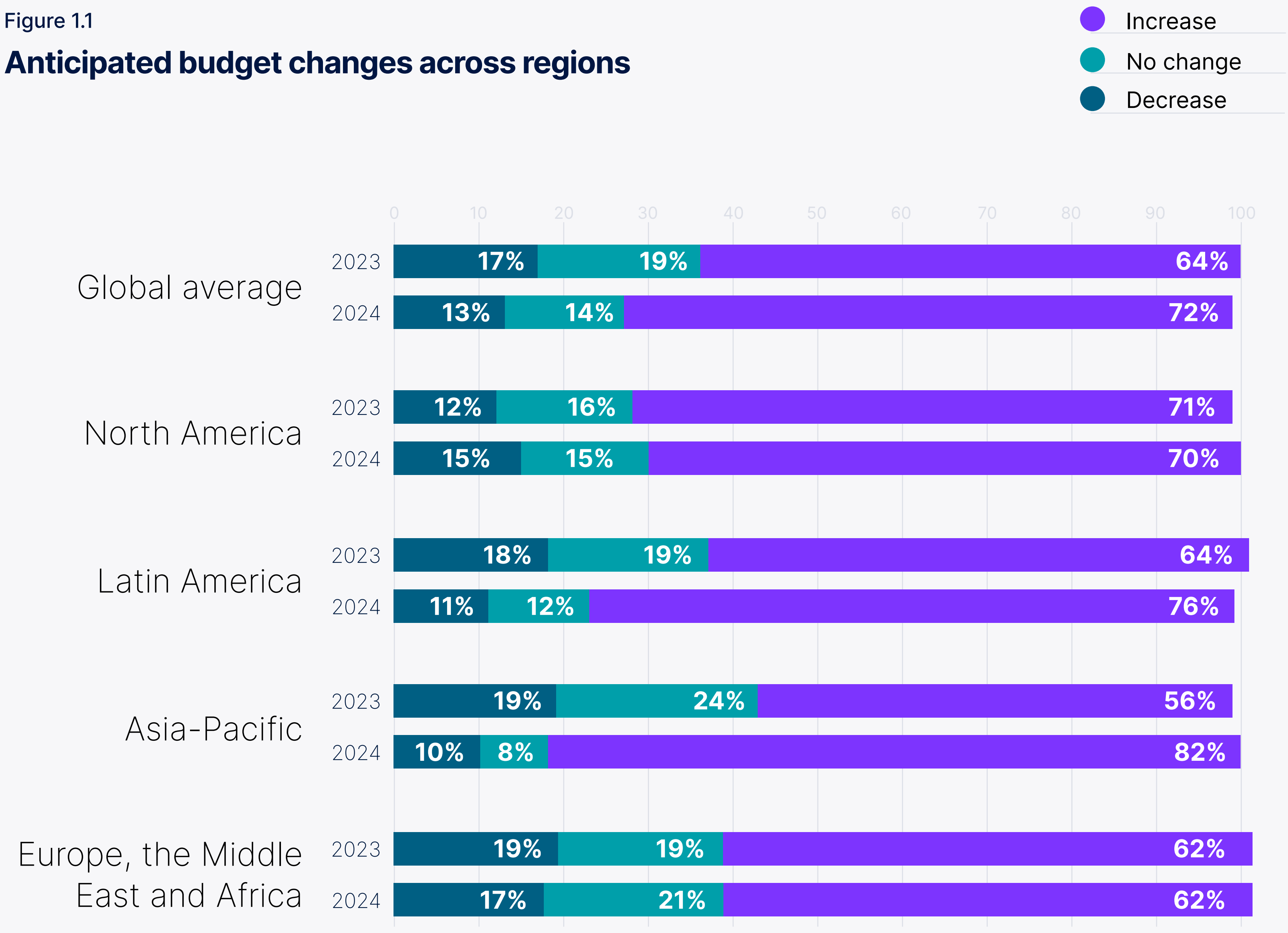
Marketers are feeling more optimistic on ad spend

Delivering ROI has always been a top priority for marketers. While “returns” can mean more than just sales figures on a spreadsheet, the unsettled nature of the global economy over the past few years has forced marketers to focus on revenue more than any other KPI.

This year, however, marketers appear optimistic: 72% expect bigger ad budgets compared with last year, when only 64% expected a budget increase. APAC is particularly bullish, with 81% anticipating budget increases, versus just 56% in 2023.

Figure 1.1

Anticipated budget changes across regions



Read as: 72% of global marketers expect budgets to increase. | Percentages may not sum to 100% because the chart does not include responses for “not applicable”. | Source: 2024 Nielsen Global Annual Marketer Survey

Global marketers plan to increase digital spend

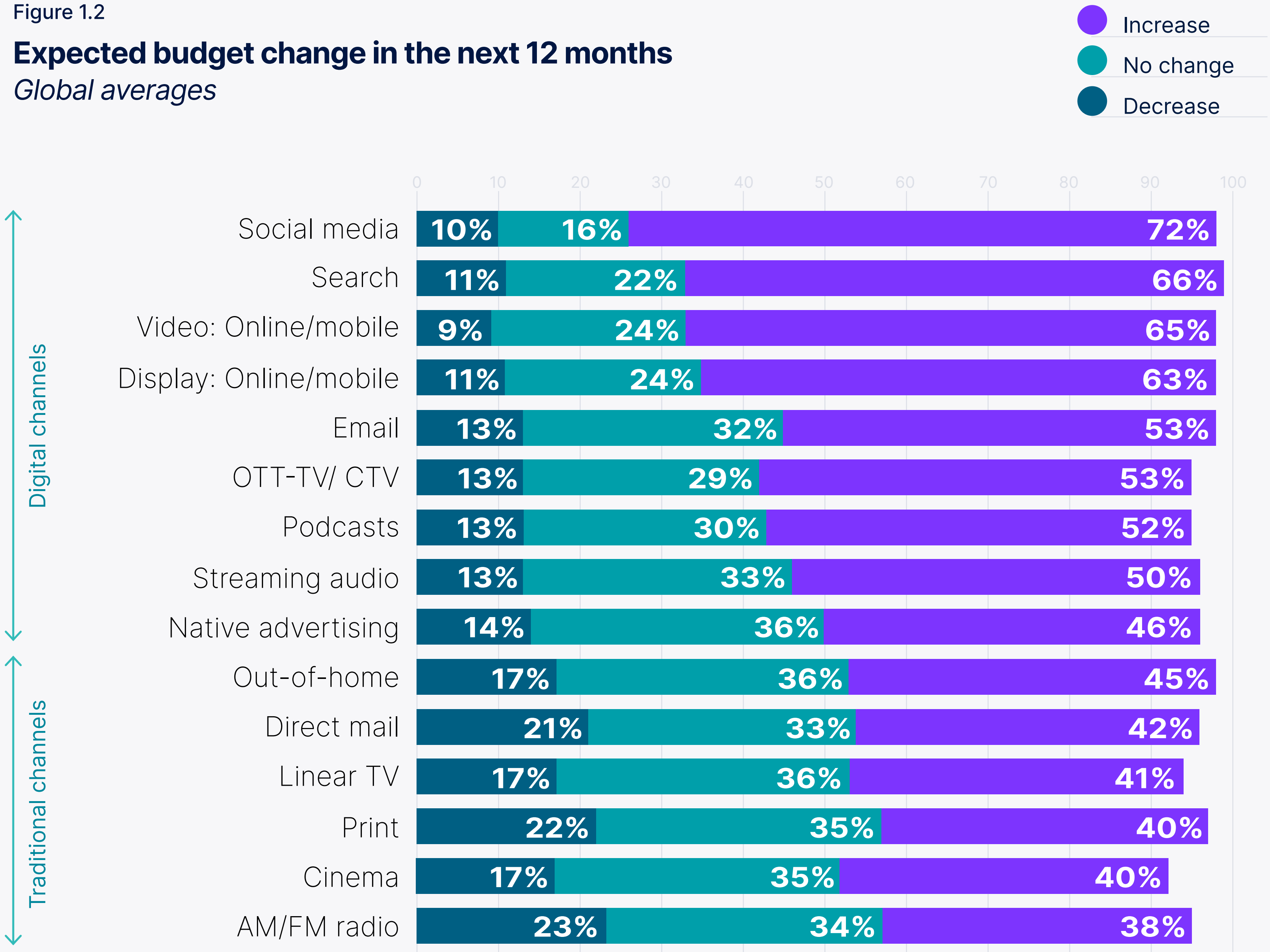
On average, global marketers plan to dedicate 63% of their budgets to digital channels, with social media, search, online video and digital display accounting for the largest increases. For context, last year's respondents said they allocated approximately half of their 2022 budgets to digital channels.

Global marketers expect to allocate more than 63% of their ad budgets to digital channels in 2024

Figure 1.2

Expected budget change in the next 12 months

Global averages



Read as: 72% of global marketers plan to increase their spending across social media channels.
Percentages may not sum to 100% because the chart does not include responses for "not applicable".
Source: 2024 Nielsen Global Annual Marketer Survey

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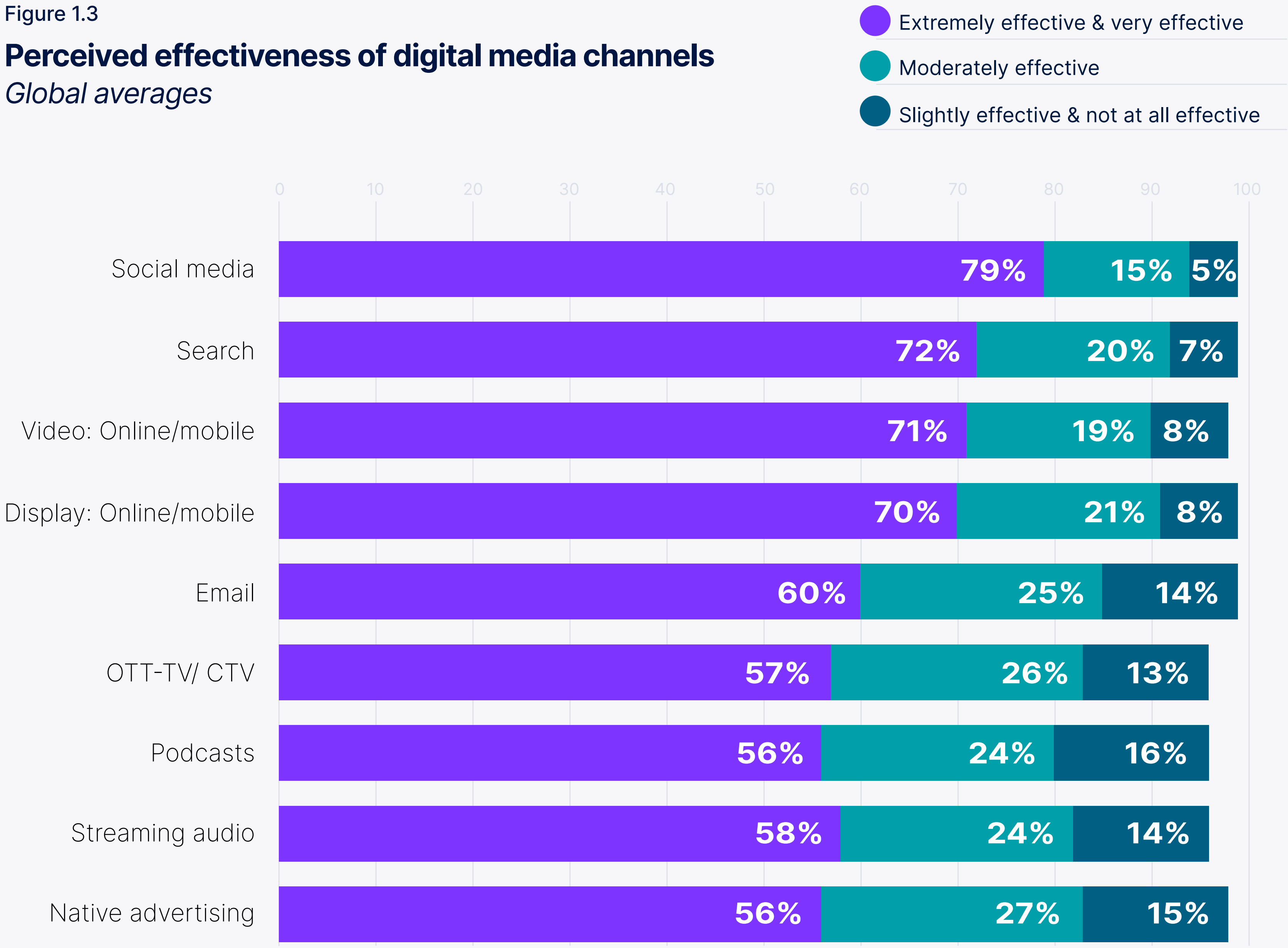
Marketers are leaning in to digital's perceived effectiveness

In terms of media mix, marketers around the world remain committed to increasing their spending across select digital channels, attributing the continuing shift to higher perceived effectiveness.

Figure 1.3

Perceived effectiveness of digital media channels

Global averages



Read as: 79% of global marketers view social media as extremely/very effective.
Percentages may not sum to 100% because the chart does not include responses for "not applicable".
Source: 2024 Nielsen Global Annual Marketer Survey

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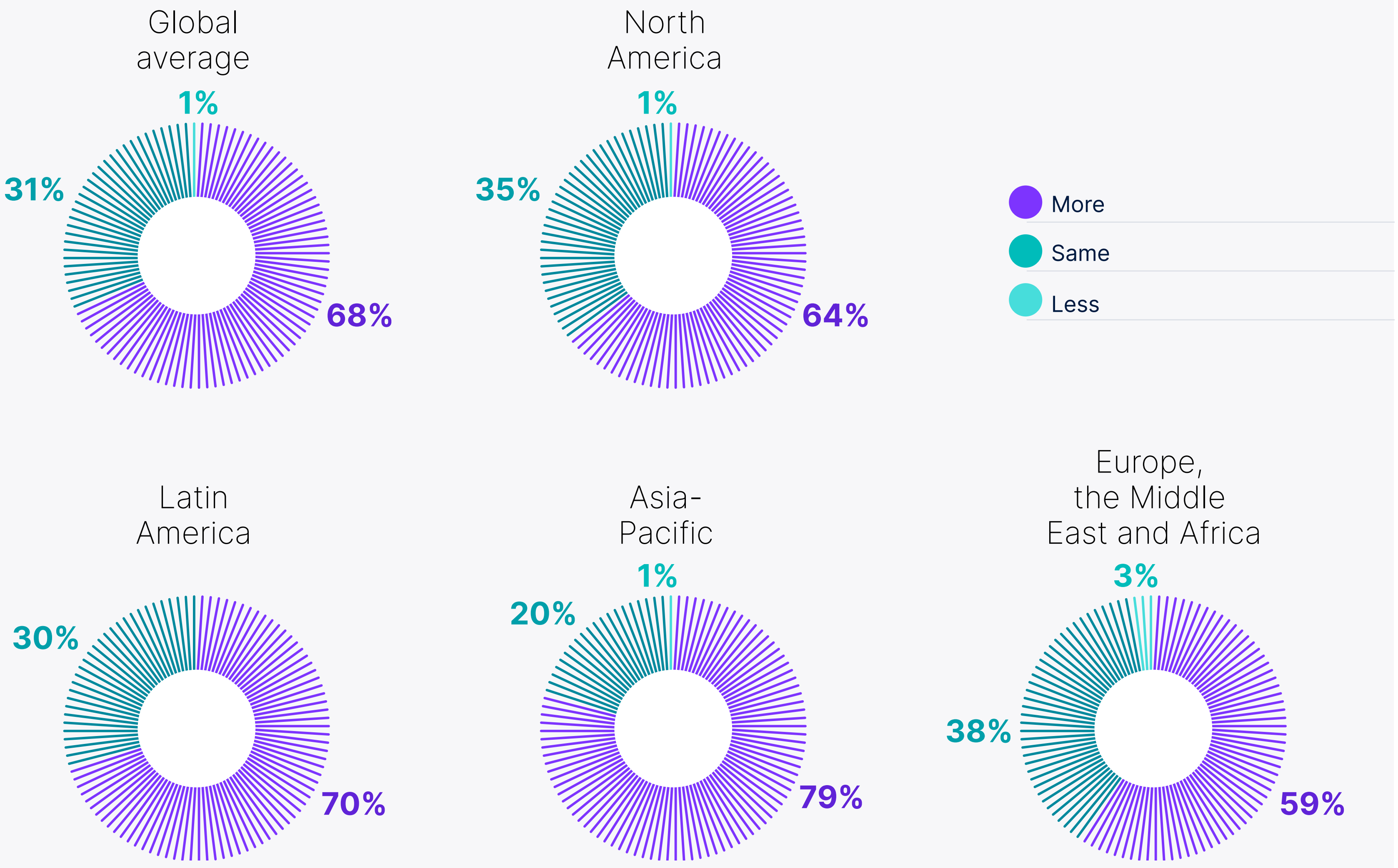
Global marketers plan to up Retail Media Networks investments

The planned increases in search and CTV follow a familiar trend in recent years, driven by perceived effectiveness and growing usage. More recently, the rise of retail media networks as a lucrative channel has marketers readily adding them to their media plans. In 2024, nearly 70% of global marketers say the importance of retail media in their planning is more important than it was a year ago.

Industry ad spending forecasts for the year are similarly optimistic, as several leading media investment companies are predicting ad spend growth ranging from 4% to 7%[1]. They also expect retail media, search and CTV to drive the biggest increases.

Figure 1.4

Importance of retail media in 2024



Read as: 68% of global marketers say retail media is more important to their media strategies in 2024 than a year ago.
Source: 2024 Nielsen Global Annual Marketer Survey

[1] GroupM forecasts 5.8% ad spend growth; Magna forecasts 7.2% ad spend growth; Dentsu forecasts 4.6% ad spend growth.

How social media and search spending measures up

The allure of digital media has clear merit. But in looking at marketers' top objectives for the year Nielsen's outcomes data doesn't support some of marketers' planned media allocations.

Social media, for example, continues to garner the biggest marketing increases among global marketers. Over the past three years, the average ROI of social media spending has been 36% higher than the average ROI across all media. Our brand impact data also illustrates that 75% of people who are exposed to social media ads say the ads made them more likely to purchase, use or consider the brand.

So, at a high level, the shift in spending makes sense. But results vary significantly across brands. The top 25% of brands from an ROI-generation perspective are 6x more successful than the bottom 25%. Comparatively, the average ROI of search, which is the second-most favored channel among marketers, has been 51% lower than the average ROI across all media over the past three years.

There are always winners and losers, but the performance gaps here—while not benchmarks—are notable.

ROI benchmarks aren't brand-level blueprints

Brand variability is very important when considering ROI averages. That's because absolute ROI will include brand-level factors that aggregations will mute, including industry, market, advertising budget and company size.

Marketing Mix Modeling is critical for understanding our media impact. MMM insights allow us to balance effectiveness and efficiency and scale those learnings across brands, tactics and partners. By using detailed ROIs, response curves and saturation points, we can now make smarter, data-driven decisions to maximize returns.

Anthony Jackel
Director Consumer Analytics
Ferrara

The takeaway

Marketers continue to dedicate more of their budgets to digital channels because of their perceived effectiveness. But what's effective for one brand might not work as well for another, and today's budgets don't always allow for expensive trial and error.

How do you stay relevant if mass-reach campaigns are too costly?

1

Once you identify your campaign's true goal, focus your spending on the channels that deliver the most ROI for your specific KPI. Broadcast radio, for example, is less expensive (weighted average CPM) than streaming audio and delivers a higher weighted average ROI[2].

[2] Nielsen Compass

2

Explore new media channels like podcasts and branded content. These are relatively affordable options that are proven to deliver. Our norms databases show that ads in these channels can boost brand awareness by as much as 11 percentage points.

2 Marketing misalignment

Long-term goals need a long-term focus

A performance marketing upswing

Marketers' top objective of revenue growth is a clear reflection of the recession fears that loomed large in 2023.

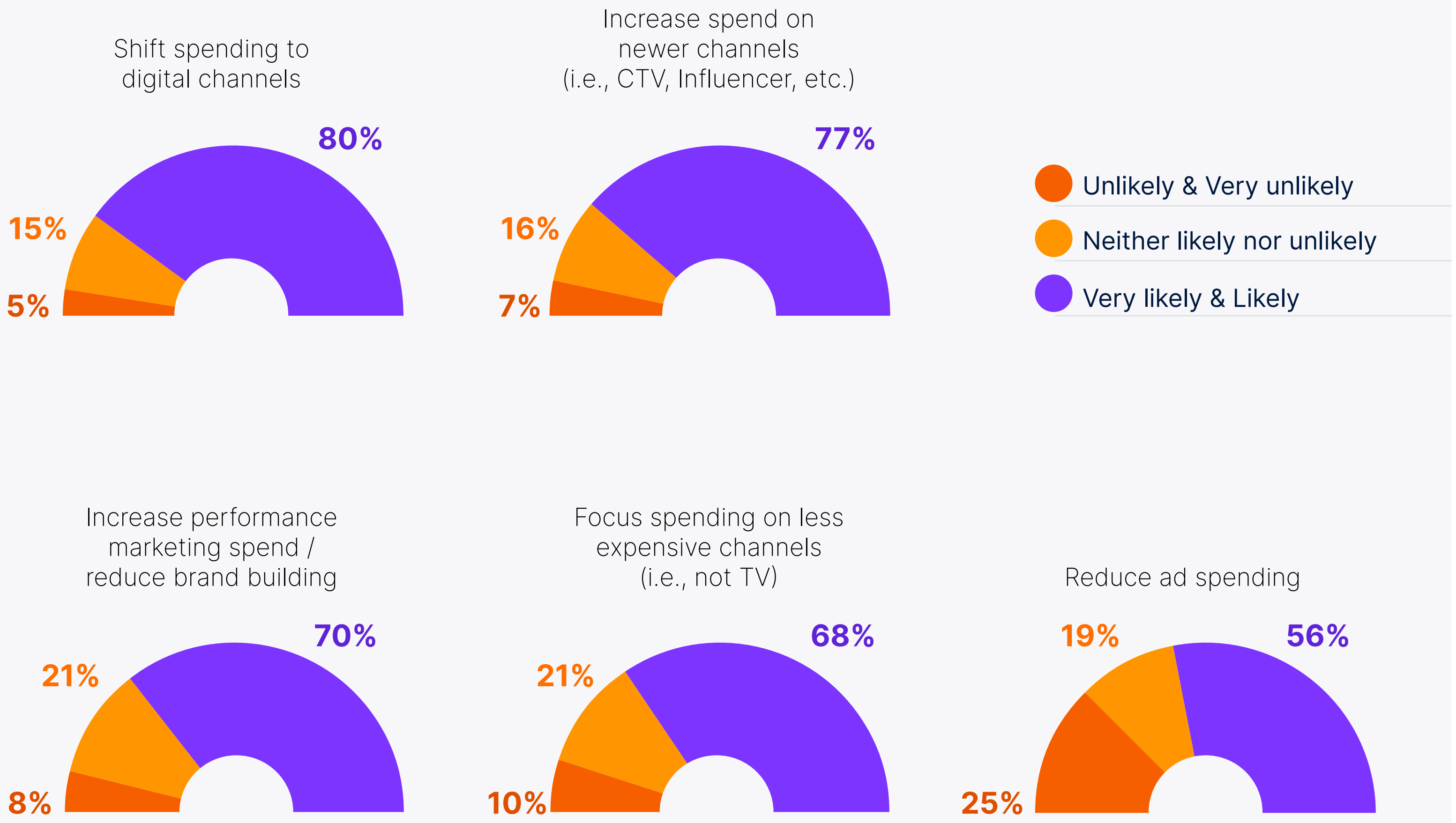
Economic uncertainty notwithstanding, marketers' stated objectives and strategies highlight a notable disconnect from their desired KPIs. From a planning perspective, global marketers' most important KPIs are long-term ROI and full-funnel ROI. But a shift toward performance marketing, combined with some of their media buying plans, won't fully support these goals.

Inflation, consumer spending and supply chain uncertainties are marketers' top considerations for media planning in 2024. Consequently, they plan to lean more heavily on performance marketing and less on brand building to meet their top objective for the year: revenue generation.

70% of marketers say they will likely use more performance marketing in their 2024 media strategies

Figure 2.1

Planned marketing tactics for 2024



Read as: 70% of global marketers plan to increase their performance marketing spend and reduce their brand building spend. | Percentages may not sum to 100% because the chart does not include responses for "not applicable".
Source: 2024 Nielsen Global Annual Marketer Survey

Declining spend across traditional brand-building channels

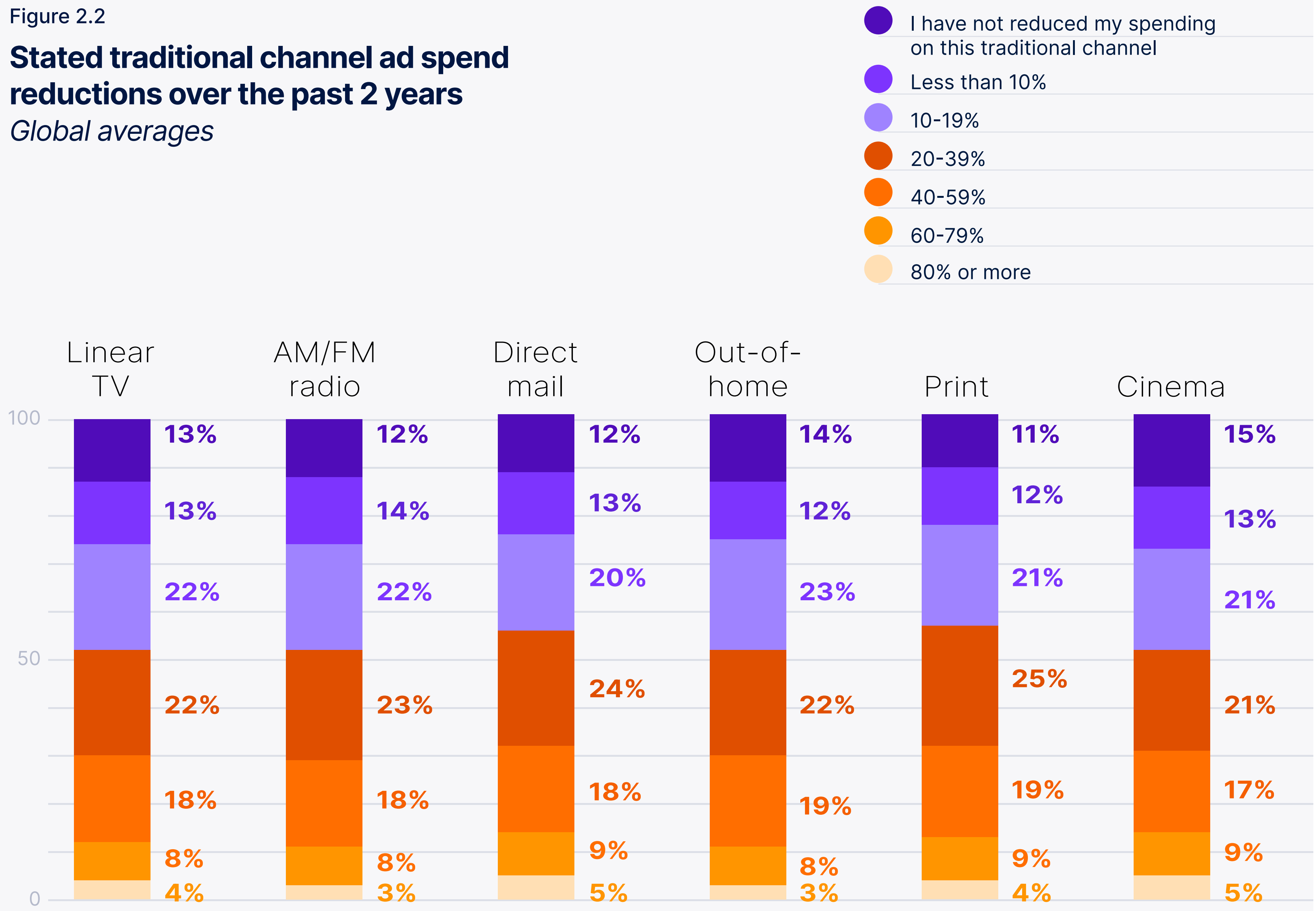
As global marketers plan to shift more of their spend to digital channels, where they can more easily track and connect their spend to revenue, they're also pulling back on spending on traditional, mass-reach channels like TV and radio. In our annual marketing survey, global marketers report reducing their linear TV and AM/FM radio spend in the last two years.

Nielsen's Ad Intel data is able to confirm marketers' reported reductions in trended TV and radio ad spending. Not all markets are seeing the same rates of decline, but TV and radio ad spending has decreased in several key markets around the world.

Figure 2.2

Stated traditional channel ad spend reductions over the past 2 years

Global averages



Read as: 18% of global marketers have reduced their linear TV spending by 40%-59% over the past two years.
Percentages may not sum to 100% because the chart does not include responses for "not applicable".
Source: 2024 Nielsen Global Annual Marketer Survey

Conversion-focused marketing is only half the funnel

Conversion-focused marketing efforts (e.g., promotions, retargeting) are attractive because they're easy to quantify and can be helpful in gaining quick sales. But they do little to attract new customers, and they can lead to brand erosion when used outside of a holistic marketing strategy.

Committing to spending for advertising can be difficult—even for massive multinationals. We saw this firsthand when global brands like Coca-Cola, General Motors and Netflix hit the brakes on their brand building efforts after the COVID-19 pandemic arrived in early 2020[3].

Those types of decisions can be costly, as Nielsen Compass data shows that a brand loses an average of 2% of future revenue for every quarter it stops advertising.

However, the inverse is also true: Investment in brand building marketing can drive revenue growth. Understanding the values and outcomes each offer will help marketers deliver full-funnel ROI.

A 1-point gain in brand metrics, such as awareness and consideration, drives a 1% increase in sales

Brand building

Upper-funnel marketing

- Messaging to influence consumer **perceptions**
- **Broad** reach
- **Long** term
- Drives **future** sales

Conversion

Lower-funnel marketing

- Messaging to influence consumer **purchases**
- **Narrow** reach
- **Short** term
- Drives **immediate** sales

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[3]Coca-Cola cut its 2020 spending by USD$1.47 billion. GM cut its 2020 promotional spending by approximately USD$1 billion; Netflix reduced 1H 2020 ad spend by more than 17%.

Brand building is critical for long-term ROI

In addition to helping stay top-of-mind with consumers, always-on upper-funnel marketing is critical when marketers are focused on long-term and full-funnel ROI. The importance can't be understated, as Nielsen research has found that ongoing marketing efforts account for 10%-35% of a brand's equity. And the ROI norms database in Nielsen Compass highlights how the long-term impact of media can even double the impact of media spend, particularly for channels like TV and digital video.

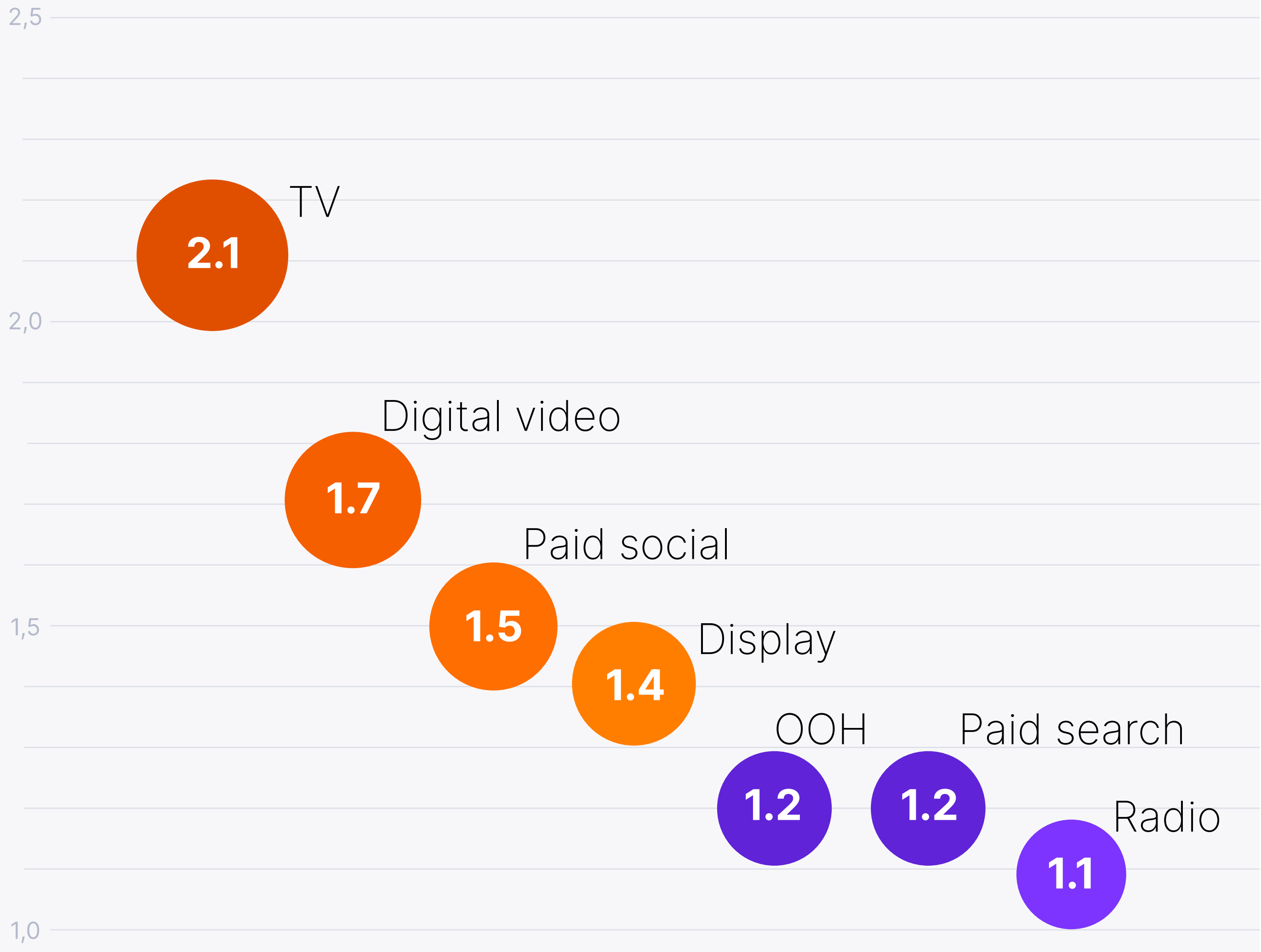
Brand building does more than just seed long-term sales. It also moderates the cost of new customer acquisition. That's because short-term marketing strategies trade future sales for near-term sales that are actually more costly to obtain.

> Brand building is not just about making a brand visible. It's about embedding into the consumer consciousness. When coupled with performance marketing's immediacy, this dual approach hits immediate sales targets while capturing market share, building market leaders and setting the foundation for a legacy of success.
>
> ***Adam Isselbacher***
> *SVP, Group Director, Research & Analytics*
> ***UM Worldwide***

Figure 2.3

Long-term ROI multipliers
Nielsen Benchmarks

ROI Multipliers are an ad effectiveness KPI that captures the long-term effect of how media can emotionally prime consumers, over time, to have a higher propensity to buy and impact core sales.



Source: Nielsen Compass

ROI case study

Measuring the effects of brand-building campaigns

Nielsen worked with Roundel, Target's retail media network, to understand media effectiveness and its impact on key brand metrics and consumer perceptions of Hanes, an American clothing company.

Hanes wanted to drive both brand and sales metrics. During a 12-week, multichannel campaign, Roundel used **Nielsen Brand Impact for In Campaign** to understand how they improved brand recognition and perception. The in-flight analysis enabled strategic insights for improvement during the campaign.

Nielsen brand impact revealed:

- About **60%** of exposed respondents indicated they "definitely will" or "probably will" **consider purchasing** Hanes the next time they shop for men's underwear at Target.
- The group exposed to the campaign had a **20% greater association** for Hanes than the group that was not exposed.
- The group exposed to the "comfort and maximum support" message had an **11% greater association** for Hanes than the group that was not exposed.
- Version 1 of the creative was 25% more likely to indicate strong brand association; version 2 drove a 10% directional lift in favorability.

The takeaway

There is monetary truth to the saying, “out of sight, out of mind.” If you let your brand decay, future sales tend to decline at a 1:1 ratio. This is the kind of ROI-minded intel you need when presenting plans to those who have ultimate say in budgets. And when advocating for a full-funnel approach, some impact may be hiding in plain sight.

How do you determine the right mix? Here are three steps to consider:

1. Measure both KPIs, then plan and optimize a budget that drives both.

2. Before deprioritizing a poor-performing channel, measure its performance for the second objective to ensure you’re not underutilizing a channel that is critical for the other objective.

3. For channels that perform poorly on the chosen objective, determine if optimizations in execution could make the channels perform on par with the rest of the plan.

3 Media balance

ROI starts with reach

On-target reach for digital ads vary wildly by region

You can't engage with audiences you never reach. Compared with less fragmented times, however, reaching audiences today requires a much deeper understanding of how they engage with media, especially across digital channels.

By looking at the nuances of each channel—in the context of how audiences actually engage with them—you're able to understand how they work together to achieve holistic campaign goals.

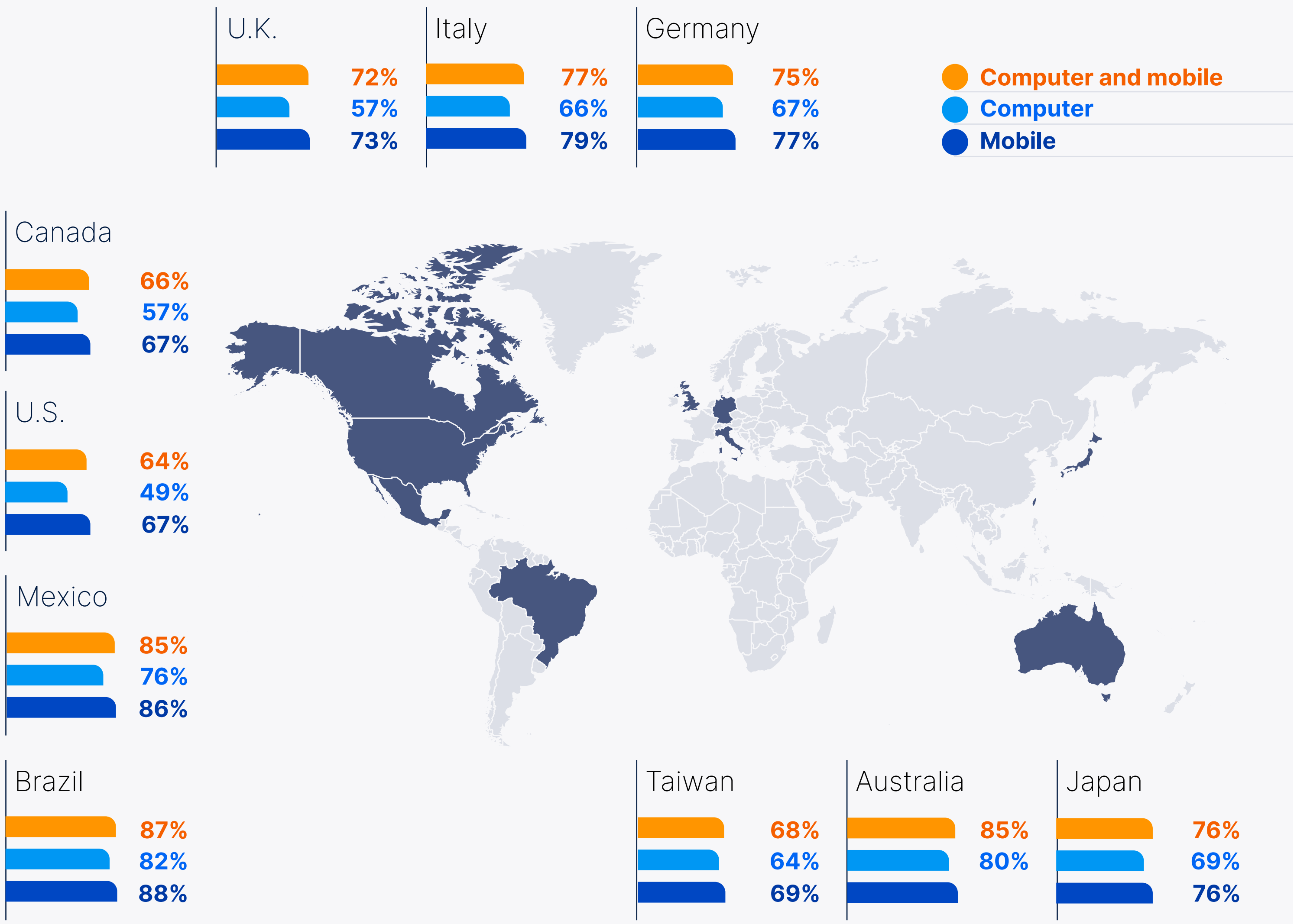
The complexity of today's media landscape is on full display in Nielsen's 2023 Digital Ad Measurement Benchmark data, especially in North America, where the average on-target rate for digital ads is just 65% (64% in the U.S. and 66% in Canada). Averages are higher across Europe and highest in select countries in Latin America. Across all markets, however, on-target rates are higher across mobile than desktop.

Quality, person-level audience data can greatly improve marketers' efforts in reaching their intended audiences.

Figure 3.1

2023 Digital ad measurement benchmark data

Average on-target rates by country



Averages include benchmarks for all impressions served through open web methodology and walled garden integrations. | Sources: Nielsen ONE Ads; Digital Ad Ratings

Nielsen

Globally, CTV penetration doesn't mean more streaming—yet

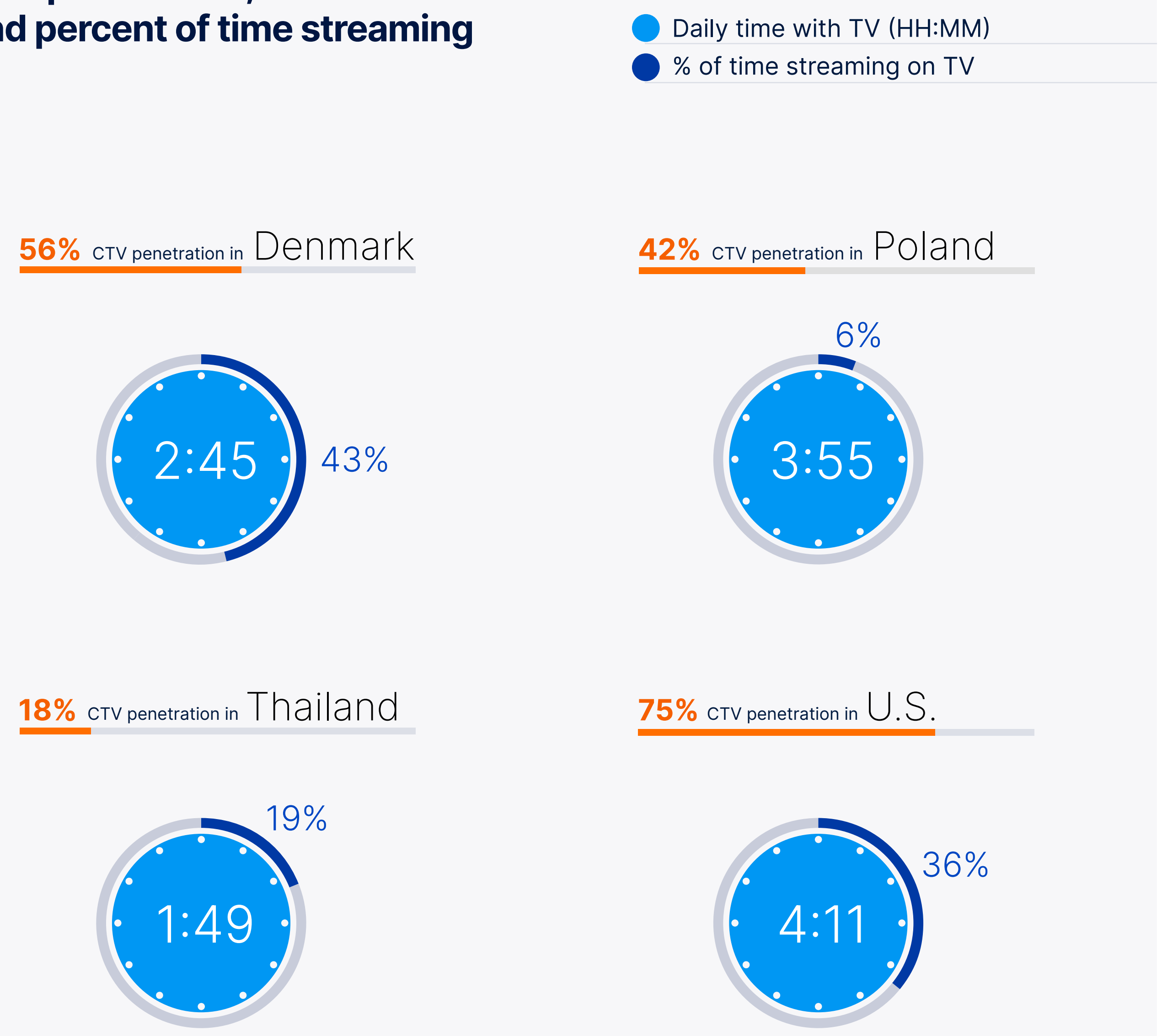
Given their growing reach, CTV and streaming represent a massive, burgeoning opportunity for marketers. At the end of 2023, for example, streaming had grown to account for 36% of TV usage in the U.S. and 24% of TV in Mexico[4]. In terms of ad spend, GroupM notes that CTV is where all the upside in TV resides, forecasting compound annual growth of 9.5% to [USD$ 45.8 billion in 2028.]

While CTV adoption has inspired significant streaming growth in some markets, it has not yet had the same effect everywhere. CTV penetration in Denmark, for example, was 56% halfway through 2023, but video on-demand and streaming accounted for just 8% of video consumption across devices. And in Poland, where CTV penetration is 42% and audiences spend almost four hours with TV each day, they only spend 15 minutes of that time with streaming content[5].

CTV penetration is 42% in Poland, but audiences there only watch 15 minutes of streaming per day

Figure 3.2

CTV penetration, total time with TV and percent of time streaming



*January 2024; Denmark: 3+, 1H 2023; Poland: 4+, 1H 2023; Thailand 4+, 1H 2023; U.S. 2+, Q3 2023. | Sources: Nielsen National TV Panel; Nielsen audience measurement

[4] The Gauge, Nielsen's monthly snapshot of audience engagement with TV.
[5] Nielsen Audience Measurement

Assessing reach requires granular data

A key challenge marketers face with respect to investing in CTV is the level of granularity needed to assess reach and performance. Reach, a top KPI among marketers in the quest for ROI, is far more complicated in CTV than linear TV because of the commingled nature of the platform and campaign IDs in measurement data. Through that lens, it's not surprising that only 31% of global marketers say they're very confident in measuring the ROI of their CTV investments.

With a focus on understanding reach within CTV campaigns, Nielsen recently used Nielsen ONE Ads to conduct a categorization and coding initiative to separate the traditional network content delivered through an internet connection digital network TV[6] content from the other online video. From there, we selected a sample of 230 campaigns at random to assess reach success levels.

Only 31% of global marketers are very confident in measuring the ROI of their CTV investments

[6] Digital network TV content is traditional, linear programming that is made available through an internet connection.

Channel diversity helps campaign reach

At a very high level, our analysis found that targeted reach was very low among campaigns that weren't dispersed across channels. Across a small portion of campaigns with concentrations of 85% or more in other online video content, for example, the highest target reach was 17%. Campaigns that heavily invested in digital network TV content had similar results. Reach increased when campaigns were more dispersed and included digital network TV and traditional TV buys.

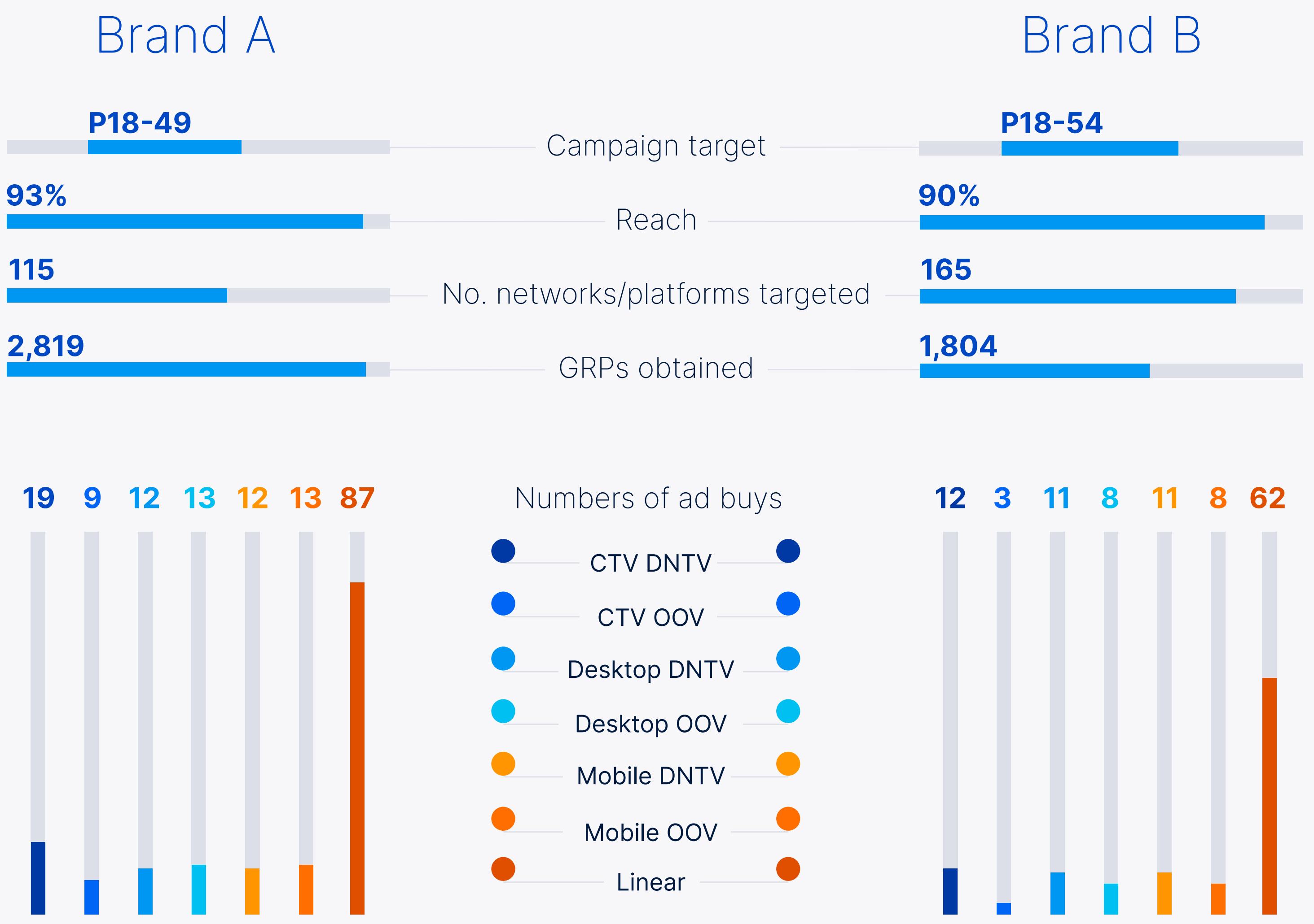
Across 230 CTV campaigns, only two brands were able to achieve 90% reach

The only two brands that were able to achieve reach levels of 90% or more did so by focusing on two things: Scale and a highly dispersed campaign.

Figure 3.4

Achieving reach in CTV requires dispersed media buys

How two brands achieved 90%+ reach



Source: Nielsen ONE Ads

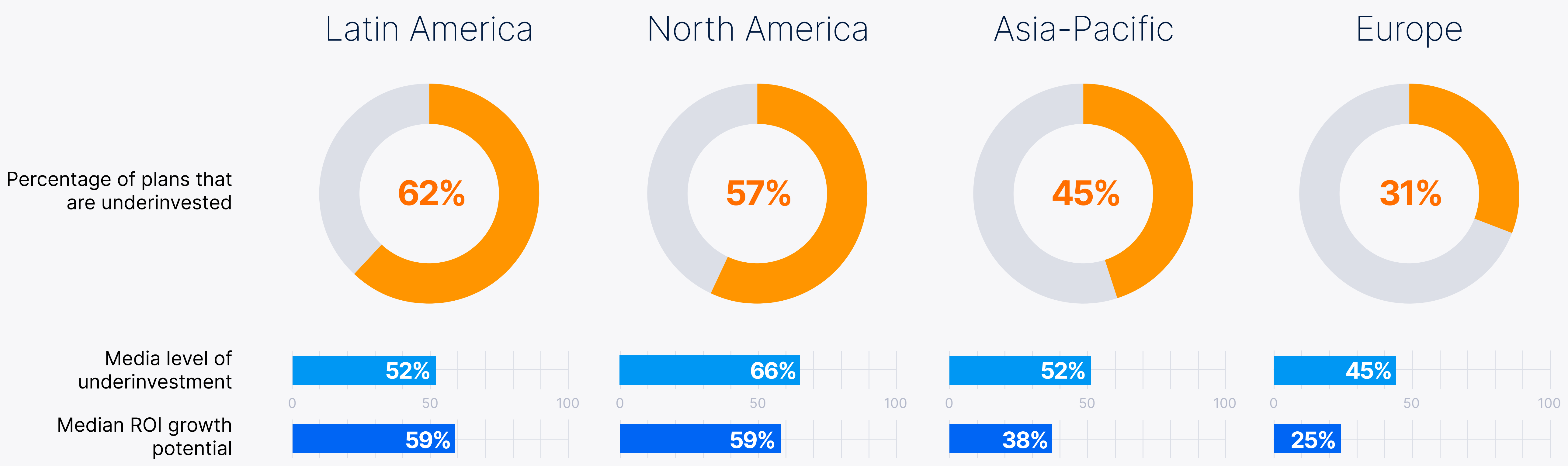
DNTV: Digital network TV
OOV: Other online video

Underinvesting hurts ROI potential

Scale is an important callout, as data from Nielsen's Predictive ROI (PROI) database has found that 50% of brands don't invest enough in media to achieve their maximum ROI. Across channels, brands under-invest the most on digital video (by 66%), followed by digital display (by 60%)[7]. Globally, underspending is highest in Latin America and lowest in Europe.

Figure 3.5

Underspending on media is rampant globally



Source: Nielsen Predictive ROI Database, 2022

[7] Nielsen Predictive ROI Database, 2022

Understanding channel effectiveness across objectives

While audiences are consuming media across multiple channels at once, very few channels are able to deliver on both short- and long-term goals.

Globally, only 36% of channels perform above average for delivering both sales and brand building. This percentage varies by region, rising to 42% in Asia-Pacific and dropping to 20% in the Americas[8].

Only 36% of media channels perform above average for delivering both sales and awareness

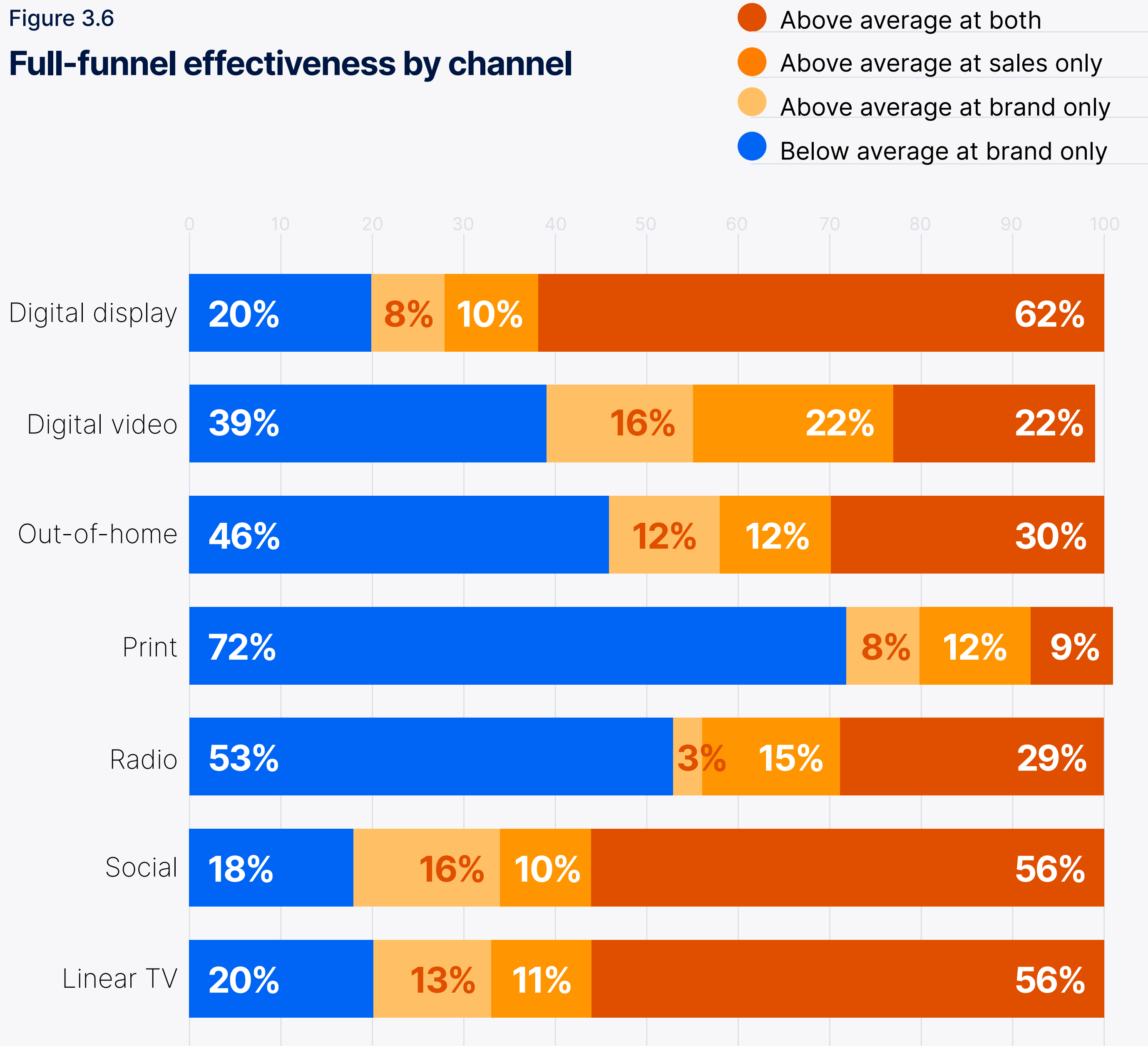
Like ROI benchmarks, channel effectiveness averages will vary at the brand level. Generally, however, digital display, social media and linear TV are stronger at delivering full-funnel effectiveness than other channels. Comparatively, print is least likely to deliver for brand and sales metrics.

Because channels may be strong for only one objective, advertisers should measure both brand building and sales impacts to understand how specific parts of your media plans drive value.

[8] Nielsen Marketing Mix Modeling studies

Figure 3.6

Full-funnel effectiveness by channel



Read as: In 62% of cases, digital display ads deliver above average effectiveness for both brand and sales objectives. | Percentages may not sum to 100% because the chart does not include responses for "not applicable". | Source: 2024 Nielsen Global Annual Marketer Survey

Nielsen

ROI case study

Understanding marketing's long-term influence on sales

A U.S. insurance company set out to understand the strength of its marketing efforts across channels, campaigns and KPIs. Aware of economic uncertainty, the company knew that if it wanted to safeguard its marketing investments, it would need to validate them both in the present and the future.

The company enlisted Nielsen to use real-time spending data to model quotes and items for new and existing customers, as well as renewals.

With the use of Nielsen's Long-Term Effects analyses[9], the company was able to prove that its marketing efforts generated more than **31% increased incremental sales** over the long term.

[9] Nielsen Long-Term Effects is a tool within Nielsen Marketing Mix Modeling that helps brands understand the long-term ROI of their marketing investments.

The takeaway

When long-term ROI is a brand's top priority, reaching and engaging new audiences is essential. Leaning too heavily into just a few channels can mean that you miss out on those fresh audiences. That's why a cross-media approach that understands the correlation between channels and outcomes is critical in media planning.

Two considerations when developing a cross-media strategy:

1

Marketers can't reach all of their intended audiences through a single channel. Ninety percent reach is P&G's goal, and the company's chief brand officer makes it clear that media precision in reaching people is job #1, complemented by ad effectiveness and optimum efficiency.

2

When massive scale is not feasible, person-level audience data can help marketers ensure that their campaigns, regardless of channel, are as pinpointed as possible.

CMOs understand the value of their teams' work and the risks of divestment. But, when advocating for budget, they need to speak the same language as CFOs. That means understanding the KPIs they care about and centering marketing plans and measurement strategies that deliver on those metrics.

Nichole Henderson
Group Manager
Campaign Analytics, Nielsen

4 Martech mismatch

The disconnect between insights and execution

Most marketers don’t measure holistic ROI

Compared with a year ago, global marketers express significantly more confidence in their marketing technologies’ ability to measure the ROI of holistic marketing efforts. On average, 84% say they’re either extremely or very confident in their ROI measurement capabilities, up from 69% in 2023. Confidence is highest in Latin America (90%), and lowest in North America (79%).

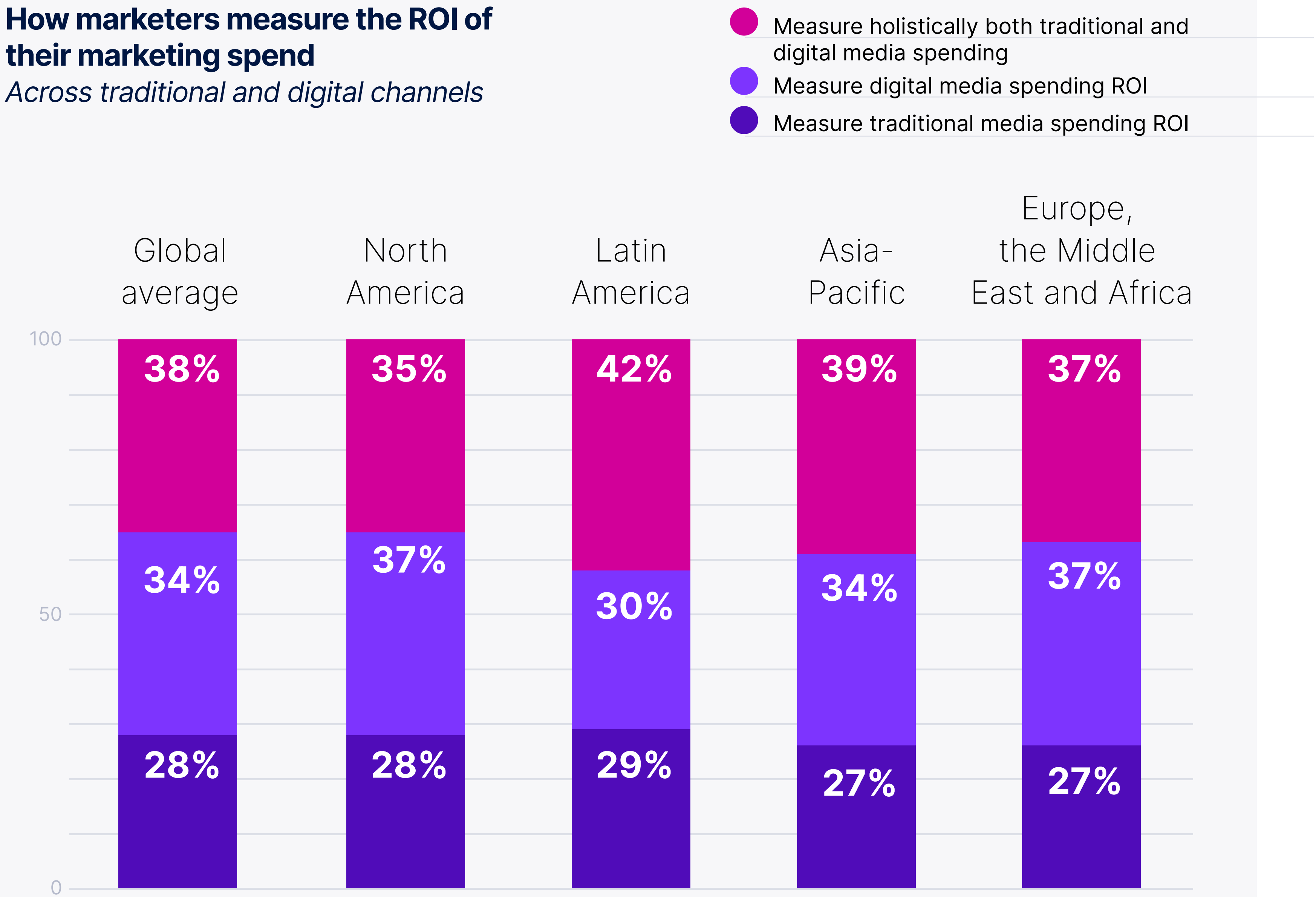
However, only 38% of global marketers say they evaluate the holistic ROI of their marketing efforts by measuring traditional and digital marketing together.

84% of global marketers say they are extremely or very confident in the holistic ROI capabilities of their marketing technology

Figure 4.1

How marketers measure the ROI of their marketing spend

Across traditional and digital channels



Percentages reflect responses to this question: How does your organization measure and evaluate the ROI of your media spending?
Percentages may not sum to 100% because the chart does not include responses for “not applicable”.
Source: 2024 Nielsen Global Annual Marketer Survey

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Measurement blind spots can misattribute ROI

There are three possible reasons for the gap between martech confidence and tactical execution:

- Varied definitions of “full-funnel measurement”
- Insufficient martech capability knowledge
- A lack of resources to evaluate and/or communicate the data to stakeholders

Regardless of reason, the mismatch creates blind spots in measurement that will contribute to misattribution and a likely underestimation of the true impact of a brand’s total marketing efforts.

Perhaps more enlightening, however, is the sentiment about the tools marketers have for measuring full-funnel ROI and which ones they use most often. More than two-thirds, for example, say they lean on media metrics for holistic ROI, even though KPI measurements like reach, click-through-rate and cost-per-click won’t provide insight beyond initial audience engagement. Comparatively, only 56% use marketing mix modeling (MMM), which is more focused on marketing outcomes.

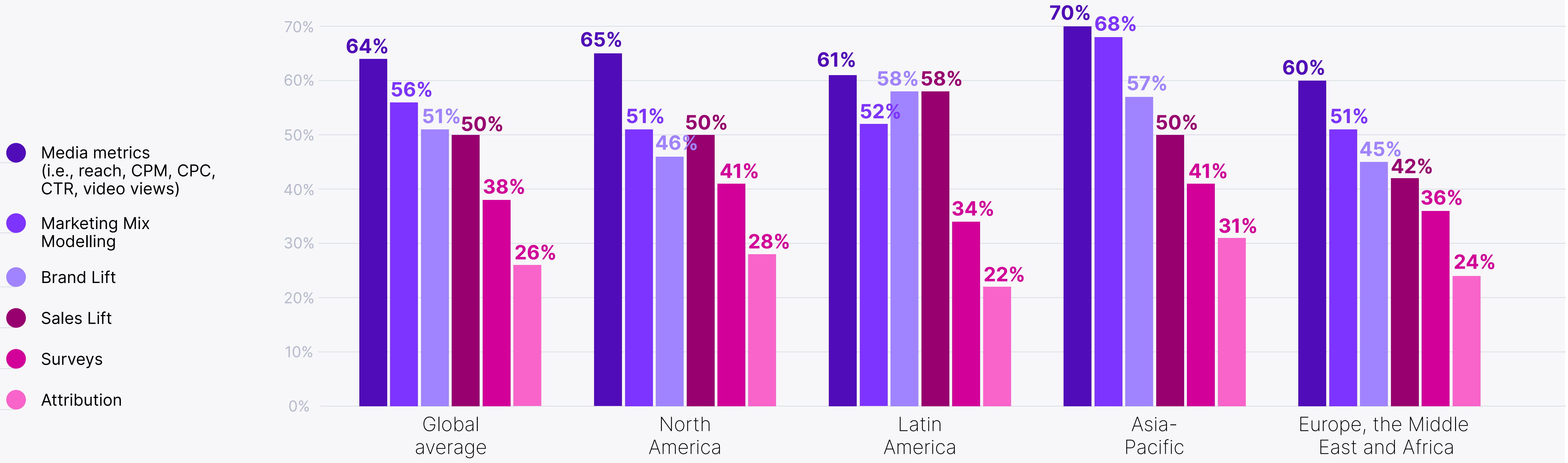
Only 30% of global marketers cite MMM as their preferred method of measuring holistic ROI

How marketers measure campaign impact

Tactically, MMM is the most prevalent option among global marketers for measuring holistic ROI. The only downside is that nearly half (44%) don't use or have access to MMM tools. We also see misalignment in marketers' stated approaches to cross-media measurement, as only 67% say they're focused on reach, frequency and ROI.

Figure 4.2

Measurement tools available to evaluate holistic ROI



Read as: 64% say they have media metrics tools to evaluate holistic ROI. | Source: 2024 Nielsen Global Annual Marketer Survey

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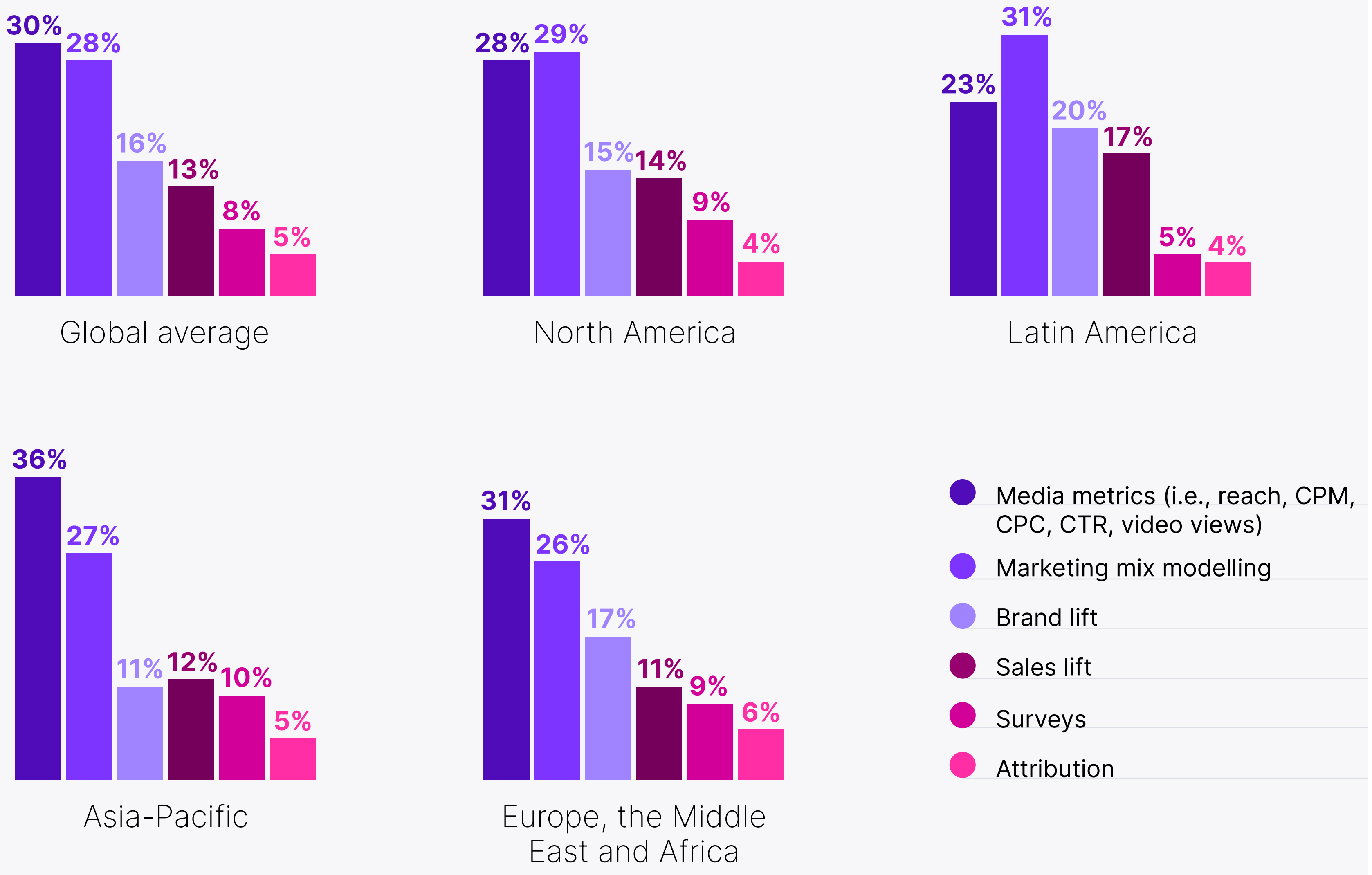
MMM alternatives offer ROI visibility

MMM can be expensive for many brands, but tools like Nielsen's PROI, a cost-efficient forecasting tool that pulls from Nielsen's extensive MMM norms database, can provide brands with immediate visibility into the anticipated ROI of their efforts even before their campaigns launch.

Figure 4.3

Measurement tools most used to evaluate holistic ROI



Read as: 30% say they use MMM most often to evaluate holistic ROI. | Percentages may not sum to 100% because the chart does not include responses for "not applicable".

ROI case study

Predicting impact to unlock optimizations

whalar

Well aware that the creator economy is booming, yet unclear on the ROI of influencer marketing, Whalar, a global company that unlocks the power of creators for its brand clients, enlisted Nielsen to help measure incrementality and ROI of creator-specific campaigns.

Nielsen's PROI capability gave Whaler clients visibility into the anticipated ROI of their media plans. This insight uncovered opportunities to optimize before campaigns even launched.

Nielsen analytic solutions revealed findings across six measured campaigns:

- Average return on ad spend (ROAS): **USD$2.63 per dollar spent**
- The average **ROAS was 9% higher** (USD$2.43) than a previous MMM study, confirming the comparability of PROI w/MMM analysis.
- Historical advertiser plans were **underinvested by approximately 75%.**

These results helped Whaler clients improve their ROIs by optimizing weekly paid media weight levels and the length of time on air, as well as reallocating resources to maximize the potential of their creator marketing campaigns.

The takeaway

Despite marketers' stated confidence in holistic ROI measurement, assurance shifts dramatically when you drill down to the channel level. For example, less than half (49%) of global marketers we surveyed said they are very confident in their social media ROI measurement.

There is a clear and urgent need to embrace a comprehensive media planning and measurement strategy; your media spend efficacy depends on it. But, getting there will require a transformative mindset and keen understanding of on-the-ground realities.

Two considerations when adopting a cross-media measurement strategy:

1

Digital media represents the future of how audiences will engage with content. However, many of these channels are walled gardens. Without interoperable solutions that work within these spaces, you'll never get the complete picture of performance.

2

The impact of a single ad exposure is a point in time. Once the time passes, its effect will fade. Brand perceptions aren't static or confined to a single point in time. That's why marketers need to reinforce their messages over time, adapting as needed, to maintain the health of their brands. Ongoing measurement is critical in validating that health.

"Marketers manage a diverse and growing number of channels, each with a unique set of activation needs and performance metrics. Nielsen's Analytics Portfolio meets marketers where they are at—across channels and across objectives—to accurately measure value and maximize returns across a complete marketing plan."

Tina Wilson
Group General Manager,
Analytic Portfolio Companies
Nielsen

Marketers' great balancing act

The media landscape won't get any less complex any time soon. Marketers will have to figure out how to balance conversion-focused initiatives with long-term, brand building needs.

As with many industry terms and phrases, "long-term" can mean different things to different people. The same can be true about evaluating long-term impact. Some may lean on downstream purchases that result from conversions or previous brand exposures. Others may opt to analyze the impact that their marketing has on driving brand equity metrics, like consideration and purchase intent.

Rather than choosing one or the other, these approaches work best when they work together. What's more, effective measurement will require an integrated effort to review both in tandem. Marketers need to measure the impact of downstream purchases as well as how consumer perceptions are affected by marketing exposures and how they're sustained over time.

Doing this right requires a cross-media mindset. Busting out of siloes ensures you're spending where it counts, and measuring full-funnel impact lets you succeed today and tomorrow.

About this report

This is the sixth annual marketing report Nielsen has produced. It's also the third to be global. The report leverages survey responses of marketers across a variety of industries whose focus pertains to media, technology and measurement strategies. For this report, we engaged 1,514 global marketing professionals who completed an online survey between Dec. 5, 2023, and Dec. 21, 2023.

In terms of seniority level, we engaged global brand marketers at or above the manager level. These managers work with annual marketing budgets of USD$1 million or more across the auto, financial services, FMCG, technology, health care, pharmaceuticals, travel, tourism and retail industries.

Here are the corresponding sample distributions by region. Please keep these sample sizes in mind when reading and interpreting the charts in this report.

Respondents by region:

APAC: 363 respondents

EMEA: 390 respondents

North America: 372 respondents

Latin America: 389 respondents

TOTAL: 1,514

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future. Nielsen operates around the world in more than 55 countries. Learn more at www.nielsen.com and connect with us on social media (Twitter, LinkedIn, Facebook and Instagram).