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EUROPEAN SUMMIT ON MEASUREMENT

13-15 June 2012, **Dublin**

Anna Kepka

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EUROPEAN SUMMIT
ON MEASUREMENT

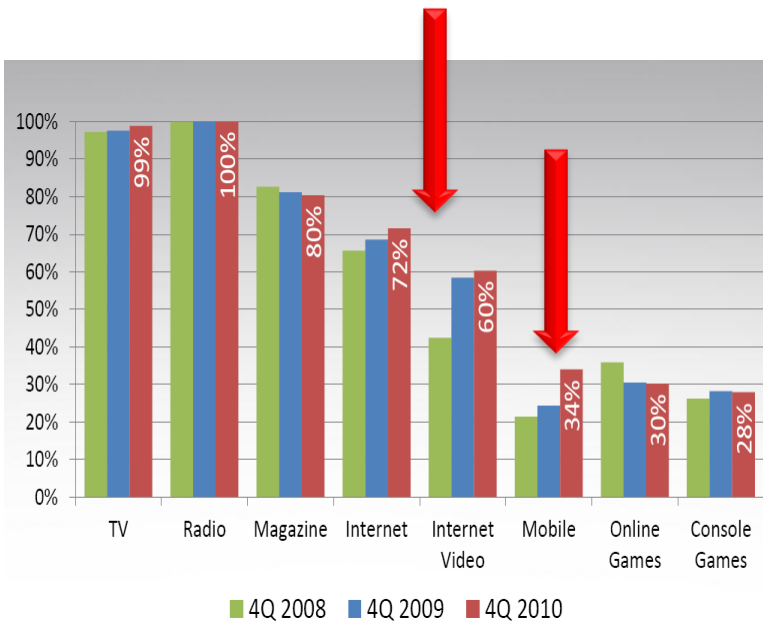13-15 June 2012, **Dublin**

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Unilever

Digital reality

Why is digital important?

Consumption by Channel

Time Spent by Channel

HOUSEHOLD PENETRATION BY PLATFORM
% of US Households

Legend: 4Q 2008, 4Q 2009, 4Q 2010

Categories: TV (99%), Radio (100%), Magazine (80%), Internet (72%), Internet Video (60%), Mobile (34%), Online Games (30%), Console Games (28%)

Sources: ESPN deck leveraging Panel measures by platform (Nielsen, Arbitron, etc)

US USAGE BY PLATFORM
Average minutes per month

	TV	Radio	Magazine	Internet	Internet Video	Mobile	Online Games	Console Games
4Q 2008	9,014	3,929	265	1,143	74	100	71	236
4Q 2009	9,001	3,377	248	1,262	419	201	48	294
4Q 2010	9,012	3,257	248	1,350	526	317	48	328
2008-2010	NC	-17%	-6%	+18%	+611%	+217%	-32%	+39%

Source: ESPN deck leveraging Panel measures by platform (Nielsen, Arbitron, etc);

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Digital ad blindness has been around for over 10 years

Marketers Seek a Banner-Blindness Cure

Videos, Mini Web Sites Help Steer Eyes to Ads Often Ignored by Users

THE WALL STREET JOURNAL. Wednesday, June 20, 2007

Digital advertising landscape very different

TV

:15 & :30

Digital

100's different types of ads units

Top three formats for each area represented.

Share of Ads Served, Q2 2010 to Q1 2011		APAC	EMEA	LATAM	NA
Standard Banner	300 x 250	34.7%	36.4%	43.3%	38.9%
Standard Banner	728 x 90	31.2%	27.8%	27.8%	34.7%
Standard Banner	160 x 600	11.1%	11.2%	9.2%	18.0%
Rich Media with Video	Expandable Banner	57.53	41.6%	70.7%	47.9%
Rich Media with Video	Polite Banner	38.0%	55.5%	24.8%	43.7%
Rich Media with Video	PushDown	2.3%	1.5%	1.5%	2.6%
Rich Media without Video	Expandable Banner	62.2%	47.2%	64.7%	42.4%
Rich Media without Video	Polite Banner	34.0%	43.3%	27.9%	52.6%
Rich Media without Video	PushDown	2.2%	1.2%	1.3%	2.6%

Source: MediaMind

Pure video pre-roll, mid-roll and post-roll is newer to the marketplace, therefore those figures on impression share would not be reported in the above data. However, this area is certainly growing in the US and abroad.
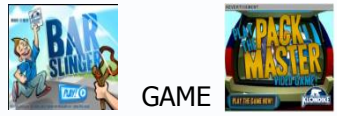
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It all starts with a consumer media insight

GAME BANNERS

VIDEO BANNERS

HPTO BANNERS

BANNERS

SOCIAL

U.S. Local Jewel

MICROSITE

IAD

MOBILE

XBOX

To get the most impact from digital campaigns
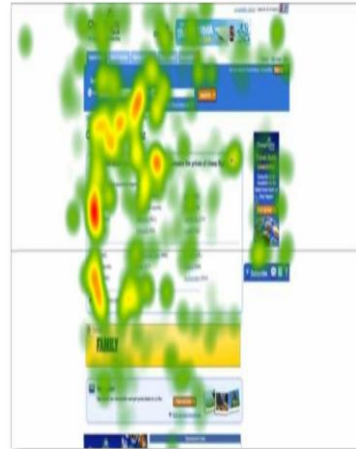
Pre-testing

In-market optimization

Post campaign

Digital pre-testing requirements

Pre-testing

In-market optimization

Post campaign

Eye tracking
In-context
Interactive ads

Multiple ad units

Home Page Takeover

Video display ad

Rich or Flash display ad

Brand impact

- Branding

- Stopping Power

- Active Engagement

- Enjoyment

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At minimum apply digital best practices
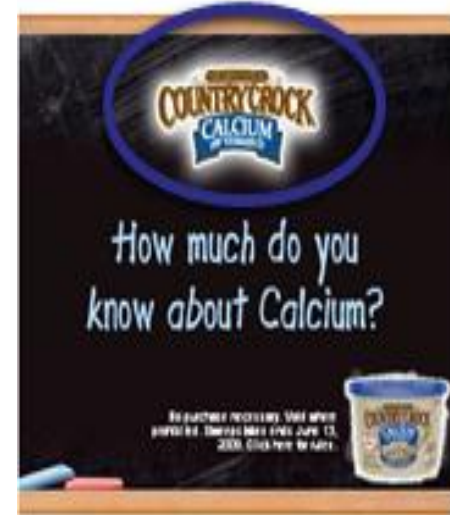
Pre-testing

In-market optimization

Post campaign

Push content to
ad unit vs pull consumer to site

Consistent branding
throughout the ad

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Digital enables real-time optimization while in-market

Pre-testing

In-market optimization

Post campaign

Dynamic Advertising
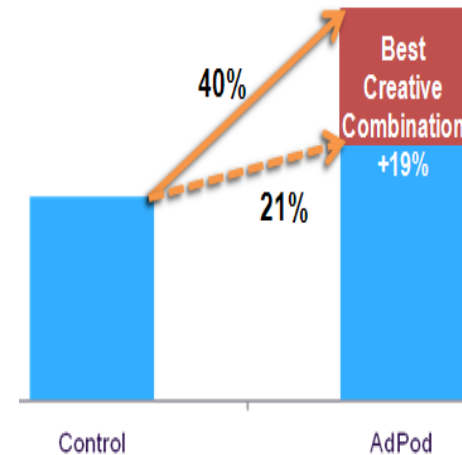
Small media buy to test various creative ads

Pre-testing

In-market optimization

Post campaign

New Year Resolution / Fresh Start

SEE HOW JESSICA GOT STARTED AND KICKED DONUTS AT SLIM-FAST.COM »
Slim·Fast
POWER UP. SLIM DOWN.
Results not typical. Individual results vary.
Follow the Slim Fast plan and include regular exercise.

Vacation / Swimsuit

SEE HOW CHERYL KICKS COOKIES AND GETS VACATION-READY AT SLIM-FAST.COM »
Slim·Fast
POWER UP. SLIM DOWN.
Results not typical. Individual results will vary.
Follow the Slim Fast plan and include regular exercise.

Brand Equity

KICK SOME CRAVINGS. START LOSING WEIGHT AT SLIM-FAST.COM »

Baby Weight

SEE HOW KRISTIN KICKED ICE CREAM AND LOST HER BABY WEIGHT AT SLIM-FAST.COM »
Slim·Fast
POWER UP. SLIM DOWN.
Results not typical. Individual results will vary.
Follow the Slim Fast plan and include regular exercise.

Relationship / Wedding

SEE HOW LAINE KICKED CUPCAKES AND GOT SEXIER AT SLIM-FAST.COM »
Slim·Fast
POWER UP. SLIM DOWN.
Results not typical. Individual results will vary.
Follow the Slim Fast plan and include regular exercise.

Sponsored — Create an Advert
Jean-Christophe's recipes
Jean-Christophe shares his cooking secrets from Family Food Fight with Flora. Get his recipes from Flora's Facebook page.
4,319 people like Flora Hearts.
👍 Like

Sponsored — Create an Advert
Keep your family healthy
Exclusive recipes to keep your heart healthy as well as the latest footage and the dishes from Family Food Fight with Flora.
1,230 people like Flora Hearts.
👍 Like

Sponsored — Create an Advert
Matt Tebbutt's recipes
Matt shares his cooking secrets from Family Food Fight with Flora. And Flora shows you how to keep your family's hearts healthy.
4,319 people like Flora Hearts.
👍 Like

Changing creative when weather forecast changes

Pre-testing

In-market optimization

Post campaign

Continuously apply new digital best practices

Pre-testing

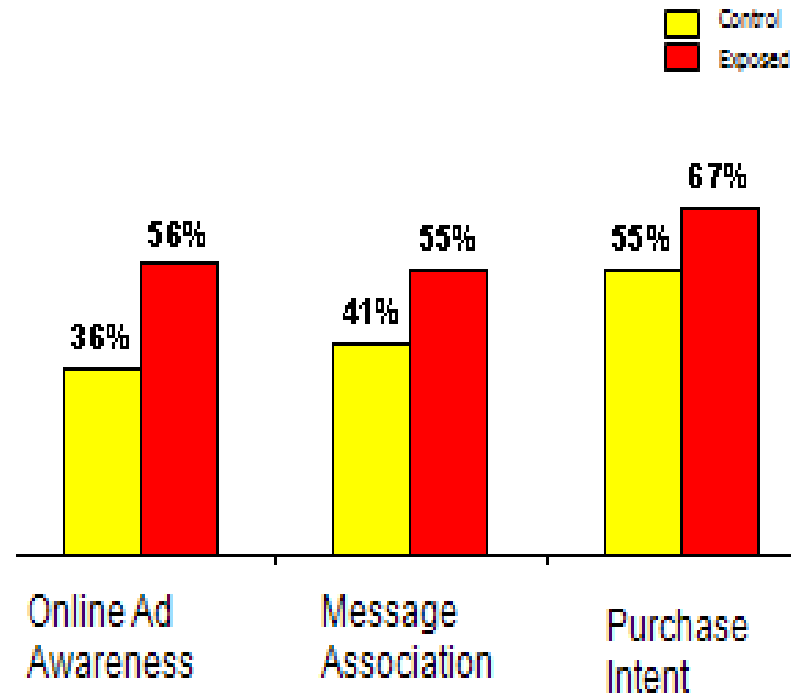In-market optimization

Post campaign

Digital ad effectiveness measures brand impact
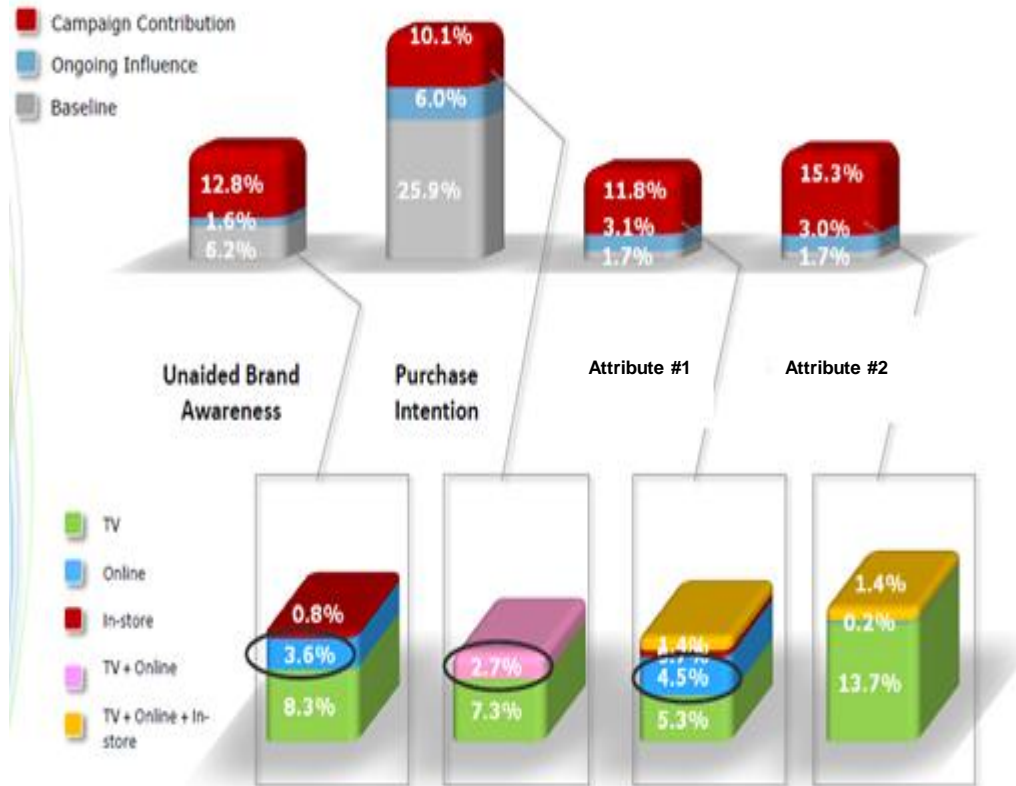
Pre-testing

In-market optimization

Post campaign

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Cross-media effectiveness measures channel contribution

Pre-testing

In-market optimization

Post campaign

Campaign Performance & Contribution by Channel

Legend:
- Campaign Contribution
- Ongoing Influence
- Baseline

Unaided Brand Awareness
- 12.8%
- 1.6%
- 5.2%

Purchase Intention
- 10.1%
- 6.0%
- 25.9%

Attribute #1
- 11.8%
- 3.1%
- 1.7%

Attribute #2
- 15.3%
- 3.0%
- 1.7%

Channel legend:
- TV
- Online
- In-store
- TV + Online
- TV + Online + In-store

Bottom bars:
- Unaided Brand Awareness: 0.8%, 3.6%, 8.3%
- Purchase Intention: 2.7%, 7.3%
- Attribute #1: 1.4%, 4.5%, 5.3%
- Attribute #2: 1.4%, 0.2%, 13.7%

Engagement metrics tracks tactic engagement

Pre-testing

In-market optimization

Post campaign

- **Challenge**: product's sales suffered with an unexpected local cultural barrier

- **Solution:** Branded sitcom Super Nice

The Sitcom

The Character

Magazine Column

TV Spot

Magazine Ad

TV Show Sketch

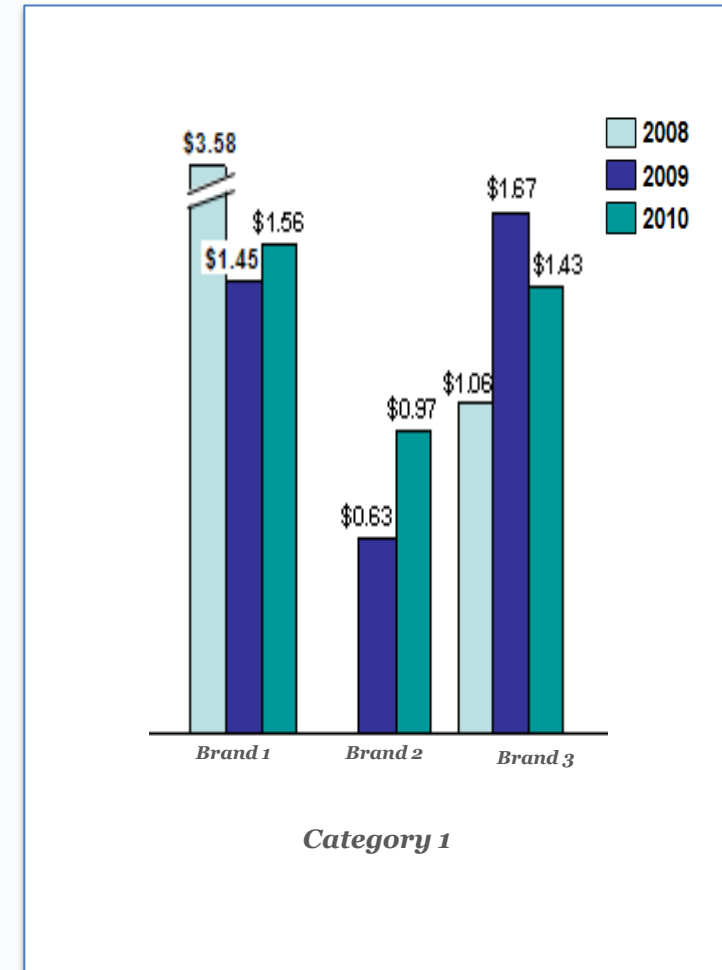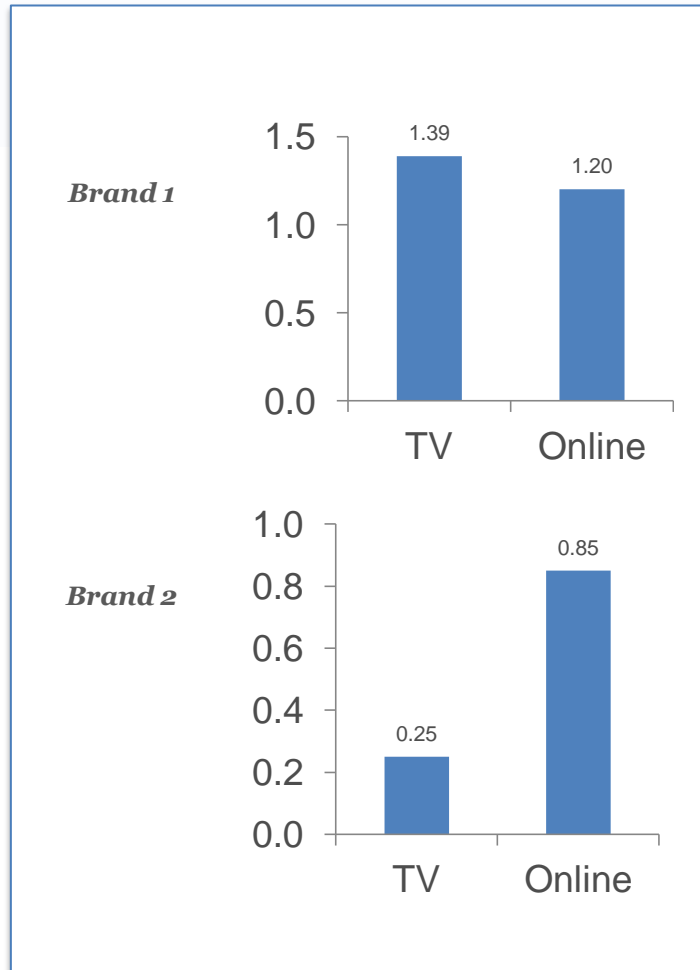Web Premiere

Social Networks

Results:

- The character , Nice, was aspirational and identifyable and established connection with consumers

- One of top 5 video bloggers watched in Brazil

- Over half million YouTube video views of "Super Nice" videos

- 30,000 fans on Facebook

- sales grow 194% in 4 months, overcame cultural barriers

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ROI analysis requires significant spend to read

Pre-testing

In-market optimization

Post campaign

Brand 1

1.39 (TV)	1.20 (Online)

Brand 2

0.25 (TV)	0.85 (Online)

2008
2009
2010

$3.58 | $1.45 | $1.56 (Brand 1)
$0.63 | $0.97 (Brand 2)
$1.06 | $1.67 | $1.43 (Brand 3)

Brand 1   *Brand 2*   *Brand 3*

Category 1

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To get the most impact from digital campaigns

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