

Because You're Worth It...

Delivering ROI to advertisers beyond “the click”...



The Nielsen Company

- Global company, long-established with an excellent reputation for media monitoring, market information and audience measurement
- “14th Most Influential Company In The World”*, accuracy of our data is a core pillar of the company
- Unique ability to analyse audiences’ behavioural characteristics across all media and markets
- Core capability to provide highly-customised insight and analytics
- Nielsen covers 95% of global online ad spend
- Nielsen is considered *the* online market currency in many countries
- As a market leader Nielsen uses patented online methodologies to gain unique online market insights

*
(BusinessWeek, Jan 2009)

Because you're worth it...

- Regional media can prove it has a quality audience online
- Regional media can prove it reaches a significant audience size online

BUT

- How well can you target those audiences that advertisers require online?
- How well can it prove that advertisers money is actually working online?

Market Domain:

- Ranking
- Trend
- History
- Geo target
- Duplication
- Demographics
- Adv demographics

Generate Report don't collapse

1 Select report period :

- Daily
- Weekly
- Monthly

2 Including date:

From:

3 Select report type :

- By Brand
- By Publisher
- By Category
- By Category Sites
- All Sites

4 Select publisher:

expand view | select all | clear

- Market Aggregate
- 24/7 Girl Ltd
- 3media Group
- ACP Media New Zealand
- Action Media Ltd
- AdHub Limited

Market Intelligence

Data

5 Select data :

- website

Select item(s) below and click 'Generate Report' to view just those item(s)

Market Intelligence Ranking Report

Market: New Zealand - Total Traffic > By Publisher (Website data)



Period: Monthly, 01/06/09 - 04/06/09

previous month next month

<input checked="" type="checkbox"/>	Rank	<input checked="" type="checkbox"/> Publisher	<input checked="" type="checkbox"/> Ave Daily UB	<input checked="" type="checkbox"/> Ave Daily UB %	<input checked="" type="checkbox"/> UB	<input checked="" type="checkbox"/> UA	<input checked="" type="checkbox"/> UB Change %	<input checked="" type="checkbox"/> UA Change %	<input checked="" type="checkbox"/> PI	<input checked="" type="checkbox"/> Total Sessions	<input checked="" type="checkbox"/> TT ('000 s)
<input type="checkbox"/>	-	Market Aggregate	1,832,228	100.00	4,193,706	-	-75.78	-	257,503,008	14,936,017	8,2
<input type="checkbox"/>	1	Trade Me Ltd	579,975	31.65	1,322,753	-	-73.85	-	178,066,193	4,441,210	4,7
<input type="checkbox"/>	2	Yahoo!Xtra	385,665	21.05	805,762	-	-72.90	-	9,946,305	3,362,659	5
<input type="checkbox"/>	3	APN Holdings NZ Ltd	274,906	15.00	694,935	-	-75.65	-	9,777,814	1,873,595	7
<input type="checkbox"/>	4	Fairfax New Zealand Limited	263,215	14.37	679,004	-	-79.35	-	8,656,717	1,859,435	5

Designed to assist online media buying/selling

WEB METRICS

Page Impressions
Unique Visitors
Streaming Counts
Duration
Frequency
Un/Scaled Coverage
Market Reach

by

REPORTS

Ranking
Trending
Duplication Sets
Demographics
Audience Profiling
Geo-targeting
Search Referral

by

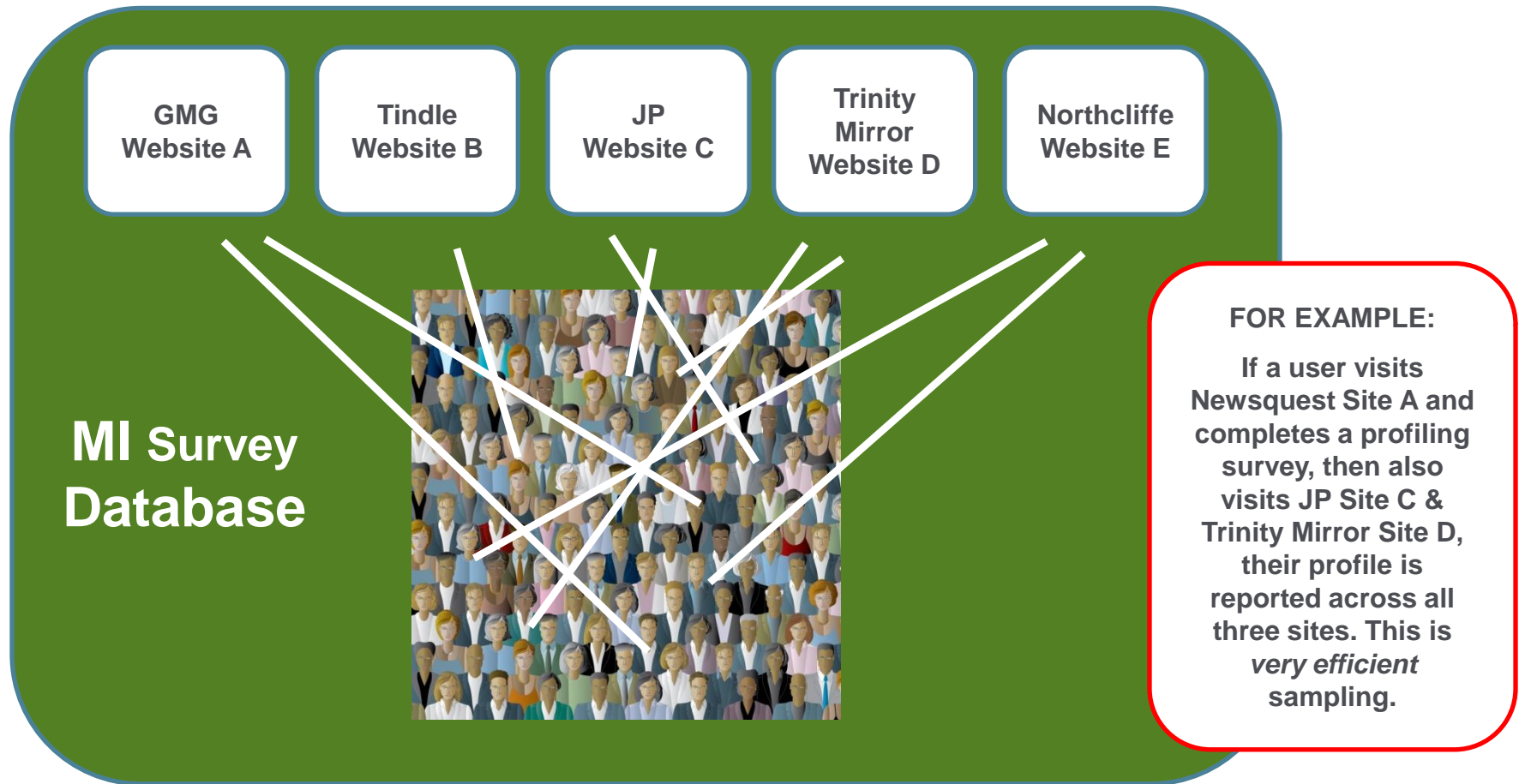
CLASSIFICATION

Publishing Groups
Brands
Regions / Categories
All/Select Sites

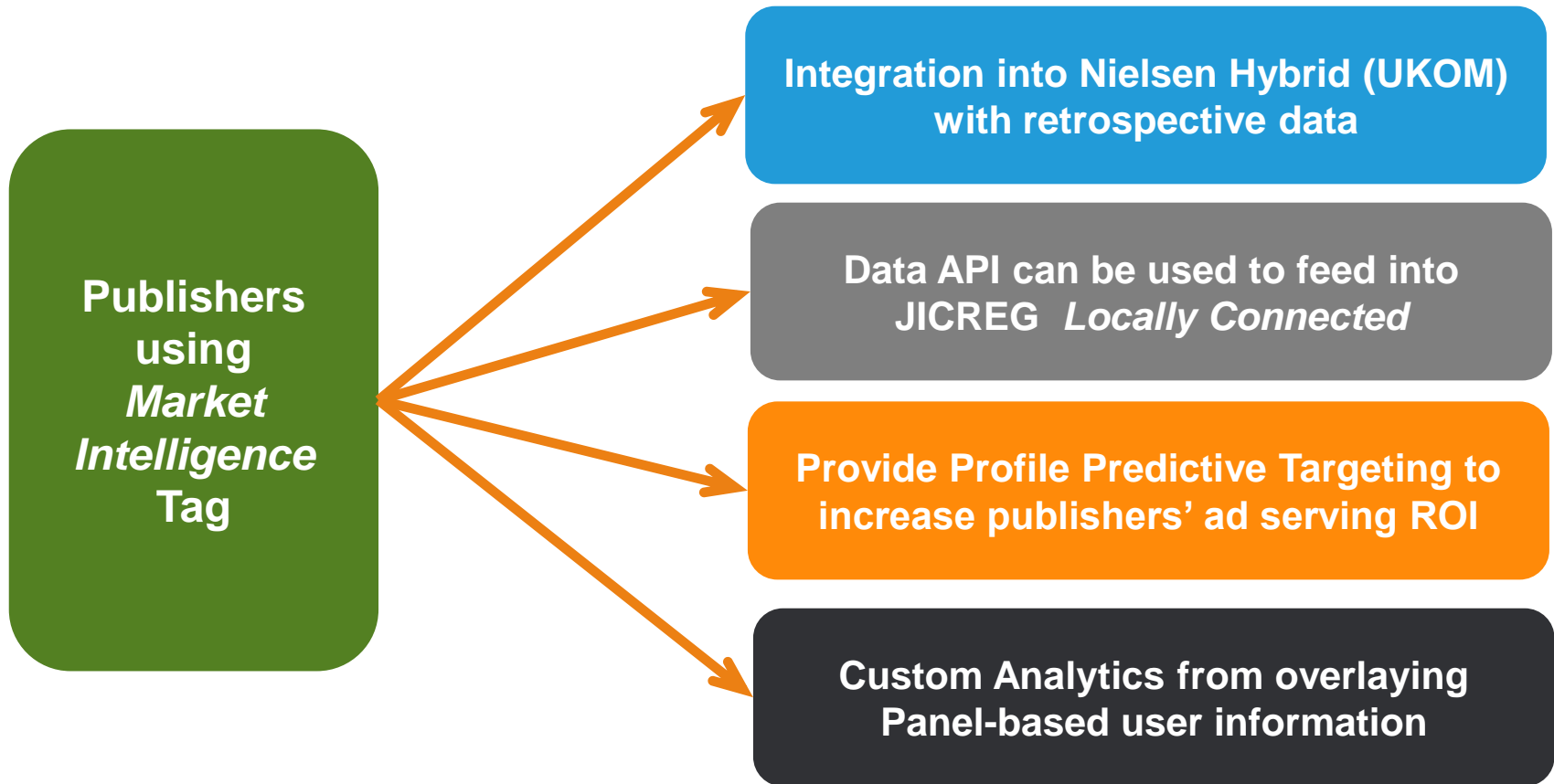
• ALL BY DAY / WEEK / MONTH

Web Traffic Profiling

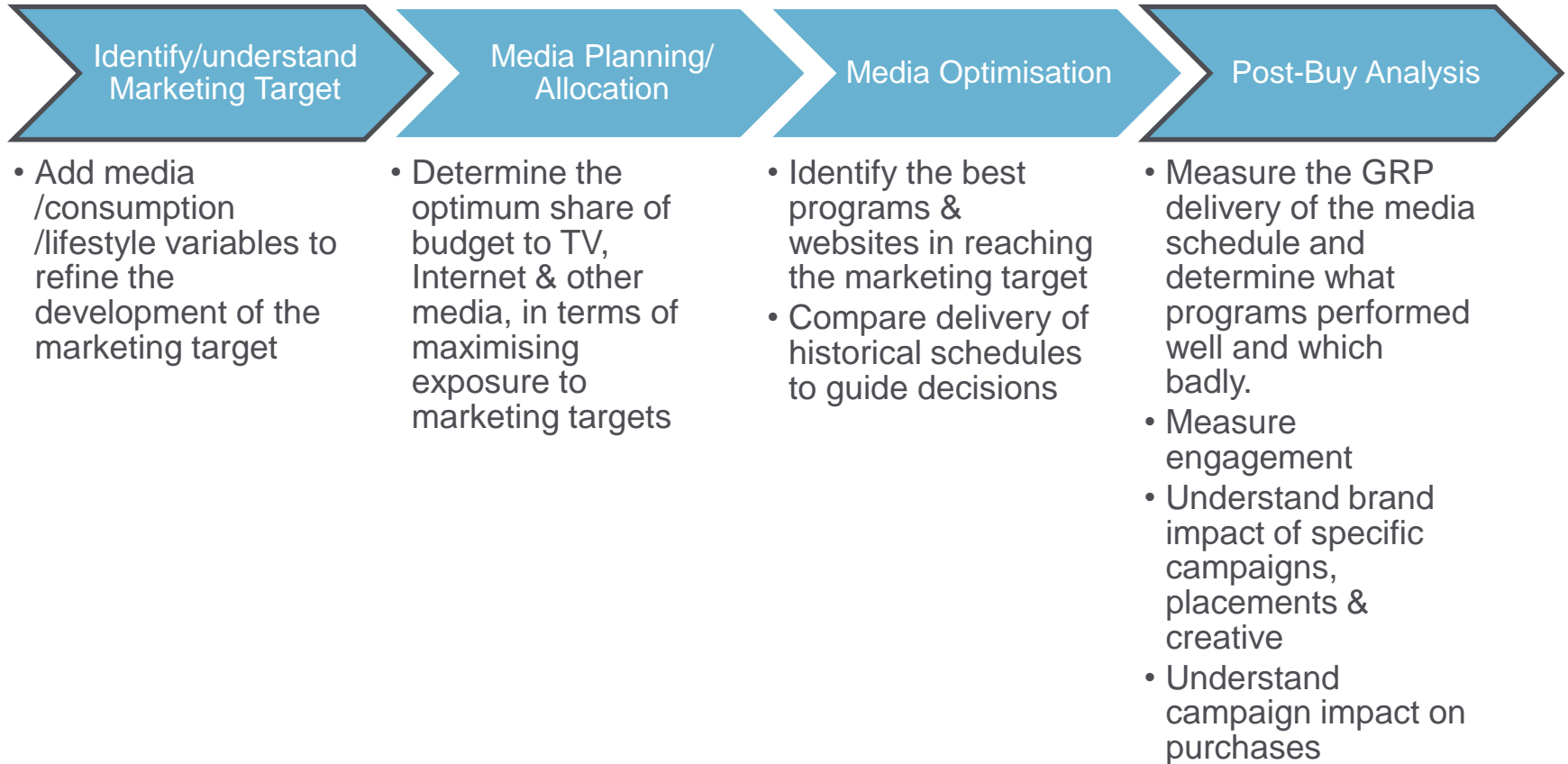
MI's unique collective sampling and profile survey means highly effective year-long profiling (flexible - clients design the survey)



Market Intelligence opens up significant options

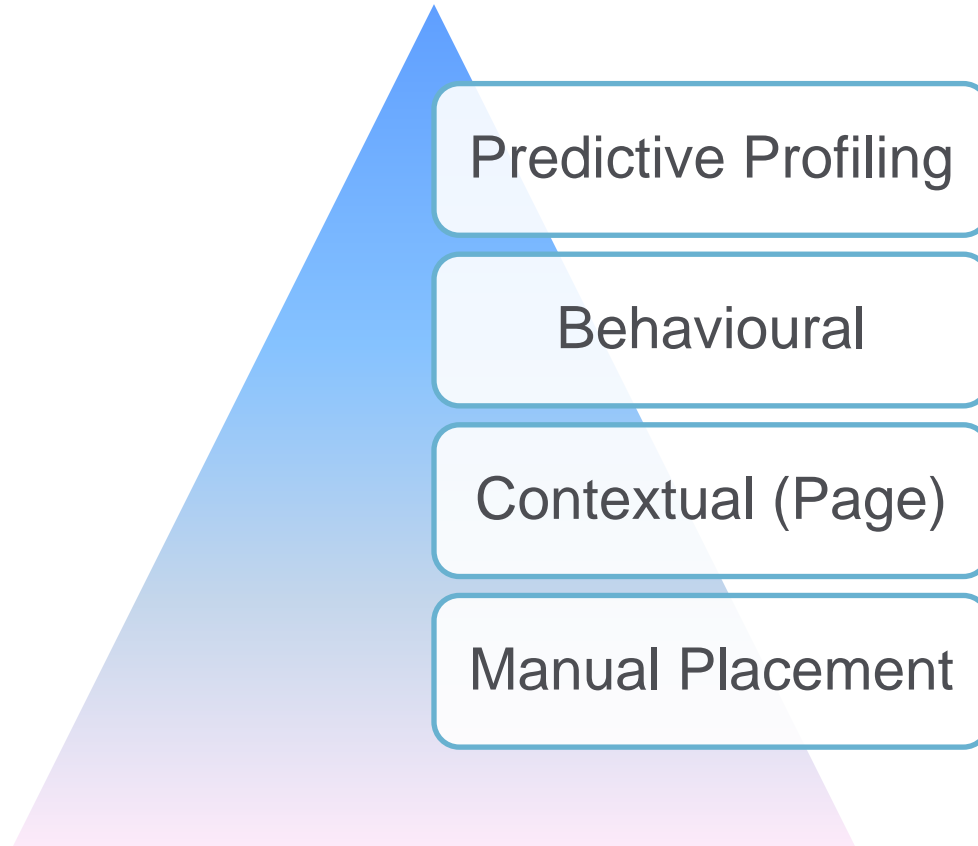


Developing ad solutions to support media allocation, creative optimisation and ROI



Online Advertising Targeting

Advertisers' Target Groups



Predictive Targeting Approach

- What can you see in this picture?
- Is this a car?

NO, you can see what it is!



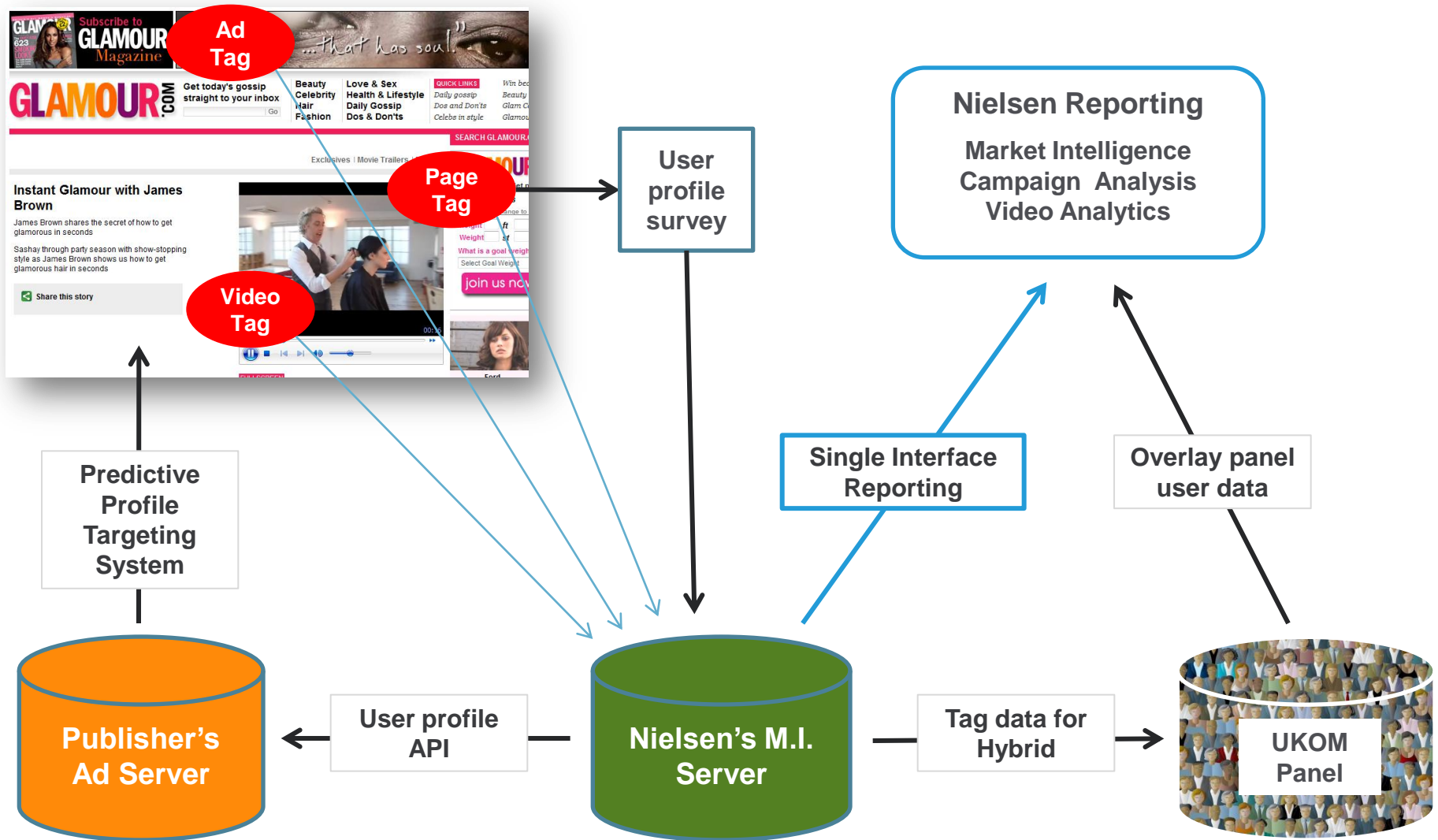
This is how the prediction process works!

- Nielsen Census Solution is recording various different characteristics of your users through Market Intelligence, but not every characteristic for every user is known.
- The solution: In the case of missing characteristics, Nielsen Targeting completes these profiles with similarity comparisons of other user profiles (prediction model).

Nielsen Targeting – well-defined targeting products.

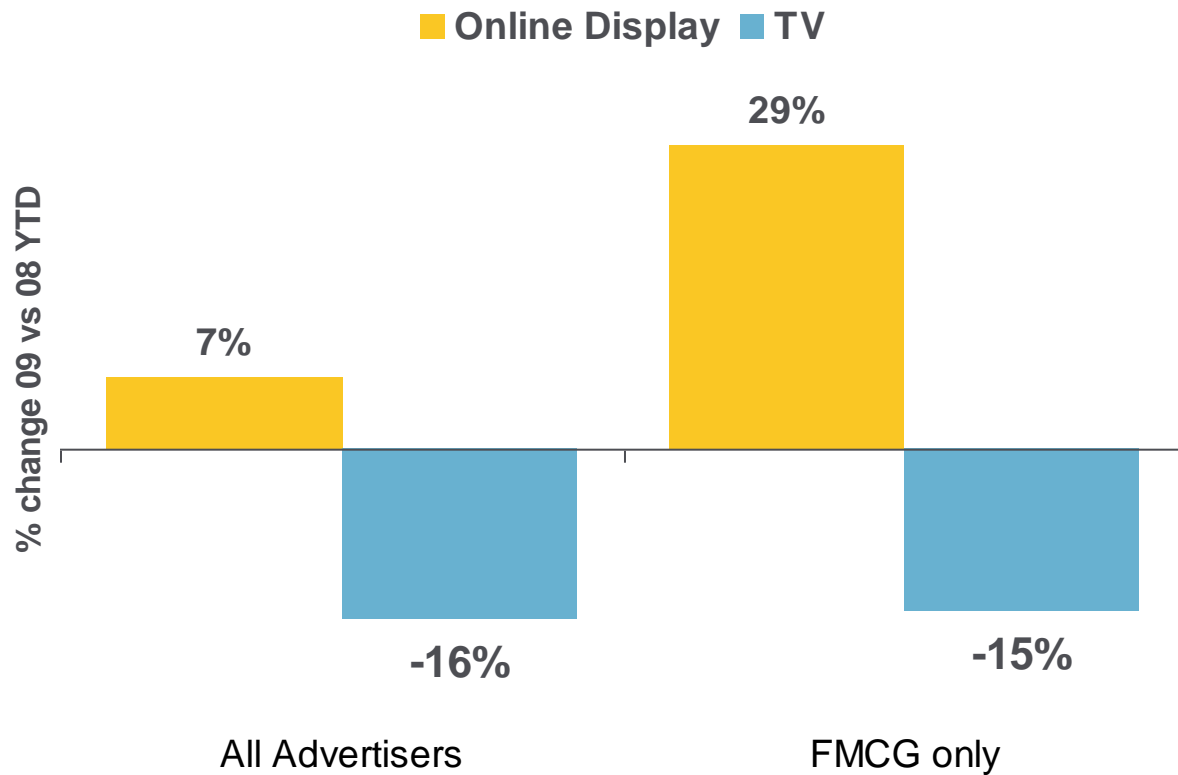
- Nielsen Targeting: standardized products for digital advertising
 - **Nielsen Targeting Socio-Demographics**
 - Important socio-demographic characteristics like gender, age or education
 - **Nielsen Targeting Affinities**
 - The most important fields of interest, e.g. “finance” or “shopping”
 - **Nielsen Targeting Lifestyle**
 - Lifestyle oriented target groups
 - **Nielsen Targeting Region**
 - Target groups based on country regions
 - **Nielsen Targeting Homescan**
 - Consumer target groups based on Nielsen Homescan or Nielsen Consumer Research data - FMCG – Targeting

Foundation for integrated & trusted ROI



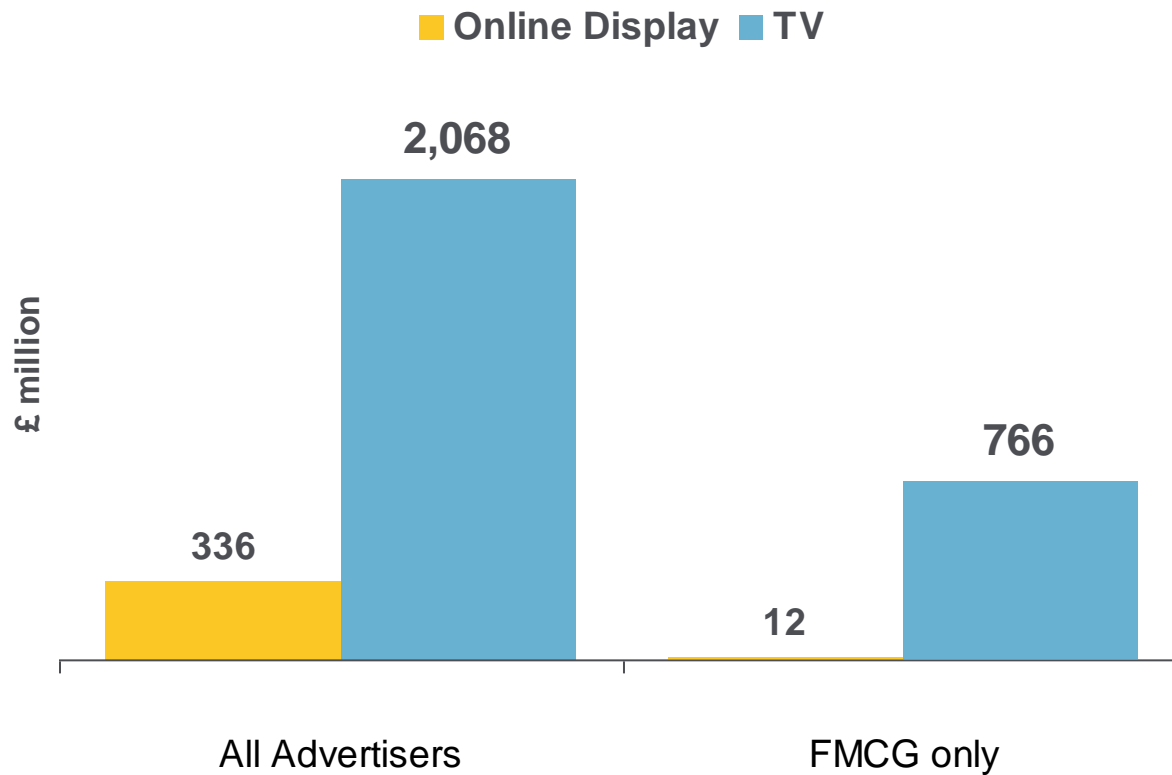
Ad Effectiveness fulfils the other
ROI requirement

FMCG advertisers are starting to invest in online display



Source: Nielsen Media Research Jan- Aug 09 vs. 08

But this is still a relatively small investment



Source: Nielsen Media Research Jan- Aug 09 vs. 08

Why the reticence to move display budgets online?



- **All forms of effectiveness revert to direct response**
 - The click through hailed as the metric of choice
 - Whilst other media historically focussed on audience delivery and not ad effectiveness as their role
- **The Ad Impression fails to assess Online's ability to deliver audiences**
 - Measures the machine not the person
 - Cookie deletion rates drastically distort the impact of online
 - No comparative measure with traditional/offline media
- **Even Online's attempt to demonstrate brand impact is flawed**
 - Since these studies delivered via pop ups measure at the peak of consumption (post exposure) and thus over inflates online's brand impact

There is a genuine need to move the Internet effectiveness measurement forwards:

1. Develop the Online GRP/Effective GRP
 - Align / show delivery versus other media
2. Measure post exposure advertiser brand engagement
 - Fairer assessment of impact than the click through metric
 - Isolate unmanaged (viral/CGM) effect of online
3. Align brand effect surveys with traditional media
 - A more realistic measure of long term branding effects of online up to 30 days post exposure
4. Measure the sales impact of online
 - Online sales via the meter
 - Long term of online in conjunction with other media

Ad Effectiveness has two main studies:

Brand Impact (Tags + Survey)

- Unaided/Aided Brand Awareness
- Aided Ad Awareness
- Familiarity and Favourability to Ad/Brand
- Key Attributes of Campaign
- Message Association to Ad/Brand
- Creative Impact
- Brand Image Associations
- Purchase/Usage Intent

Behavioural Impact (Tags + Panel)

- Total Campaign Delivery
- Reach & Frequency (e.g. GRPs for video)
- Demographic Profiling
- Placement (Sites)
- Placement Overlap/Demographics
- Campaign Build (Exposure, Cumulative Audience over time)
- Post-Exposure Action (no click)
- Post-Exposure site engagement
- Search impact

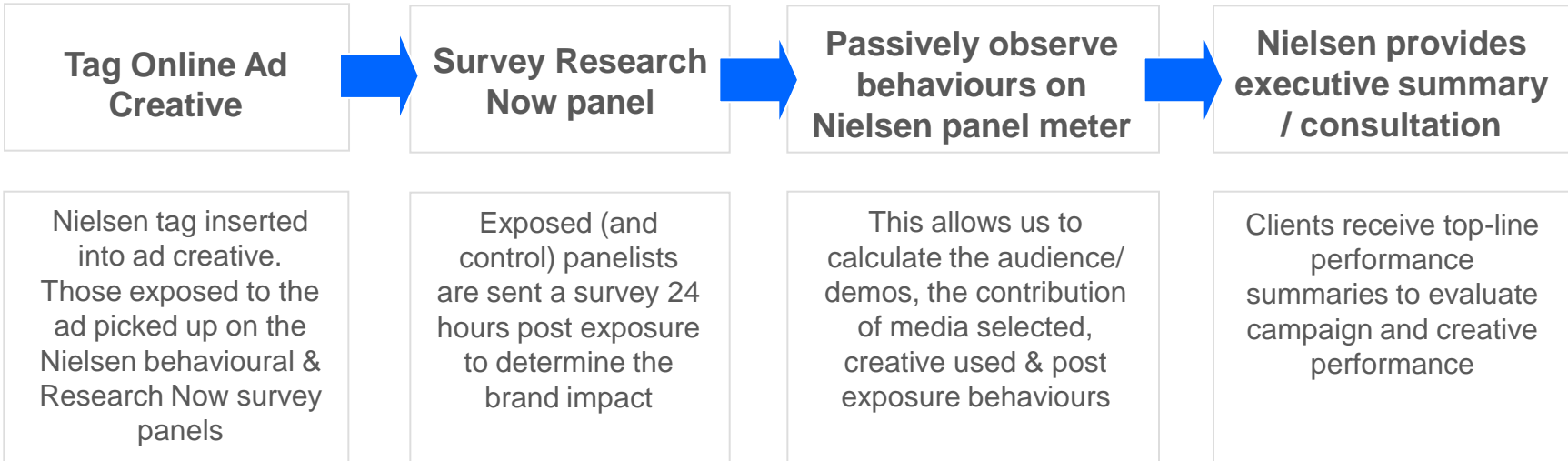
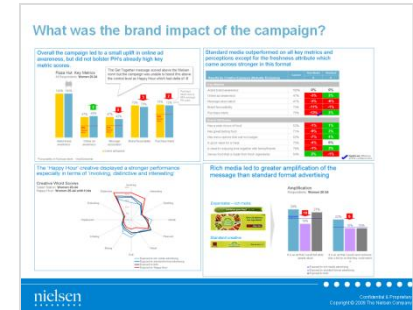
Use a combination of both

New in 2009/10: Ad Effectiveness Solution

* ``



Date	Time	Length	Break	Ad
Oct 20, 2009	12:30:30	30	Commercials	Agri or Food
Oct 20, 2009	12:30:30	30	Commercials	Home Care
Oct 20, 2009	12:30:30	30	Commercials	Bank on the Churn
Oct 20, 2009	12:30:30	30	Commercials	Bank's Impact
Oct 20, 2009	12:30:30	30	Commercials	My View and How
Oct 20, 2009	12:30:30	30	Commercials	The New... (repeated)
Oct 20, 2009	12:30:30	30	Commercials	The Better Way Home
Oct 20, 2009	12:30:30	30	Commercials	Driving Better Way
Oct 20, 2009	12:30:30	30	Commercials	Driving in a Circle
Oct 20, 2009	12:30:30	30	Commercials	The Way
Oct 20, 2009	12:30:30	30	Commercials	The Way
Oct 20, 2009	12:30:30	30	Commercials	What's the Best?
Oct 20, 2009	12:30:30	30	Commercials	What's the Best?
Oct 20, 2009	12:30:30	30	Commercials	What's the Best?



Campaign Delivery

Campaign Delivery Report

Campaign Stats

• Brands in Campaign:	1
• Ads in Campaign:	8
• Target Audience:	Mom's w/Kids
• Planned Impressions:	20,000,000
• Frequency Cap:	n/a
• Sites in Campaign:	12

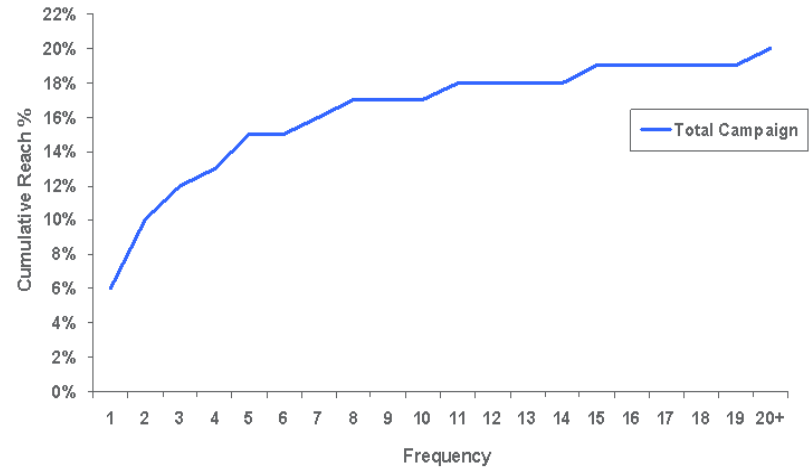
AdIntelligence Summary

• Reach (%):	0.85
• Reach ('000):	1,275
• Frequency:	3.5
• GRPs:	2.96
• 1st Target Reach (%):	1.19
• 1st Target Reach ('000):	1,785
• 1st Target Frequency:	3.64
• 1st Target GRPs:	4.33
• 2nd Target Reach (%):	1.24
• 2nd Target Reach ('000):	1,860
• 2nd Target Frequency:	3.4
• 2nd Target GRPs:	4.23

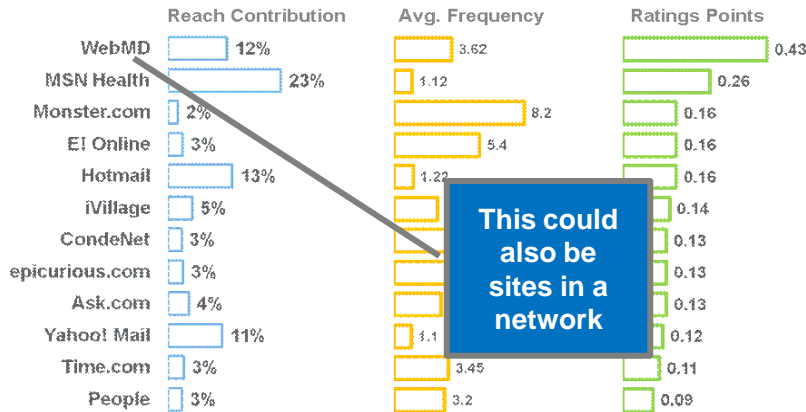
AdIntelligence Server Stats

• Ad Views:	18,756,342
• Unique Ad Views:	16,225,784
• Average Frequency:	1.16
• Ad Clicks (%):	0.12

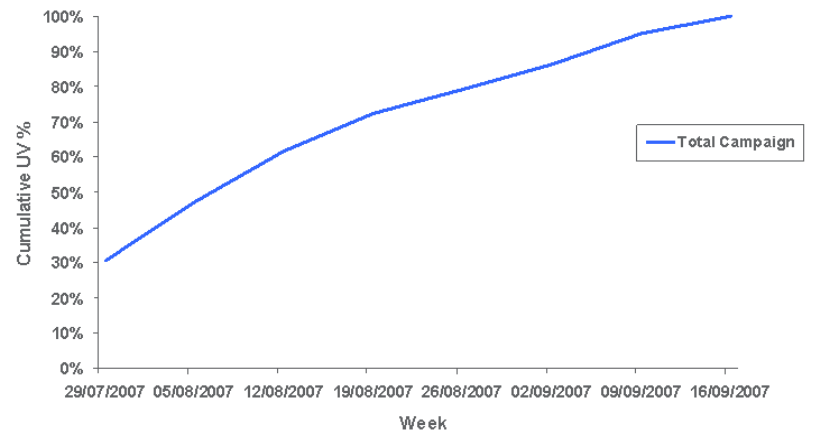
Reach/Frequency Curve



Placement Analysis



Weekly Cumulative Reach



Did the campaign deliver on plan?

Key Insights

The campaign reached **40%** of the target audience who saw it on average **12** times

The Social Network/Email category delivered **high levels of reach** whereas the Entertainment/Gossip genre were delivered frequency

A **good distribution spread** at 2-8 frequency level but be mindful of the high exposure levels within the Entertainment/Gossip sector

Watch out for **over delivery of 35+** age group by Ad Networks & Social Networking/Email sectors

The campaign achieved **good penetration** of PH's EType target groups: social lifestyle, frequent socialisers & active online spenders

Campaign Delivery

- Target Audience: Women 20-34
- Planned impressions: 72mn (observed 65mn)

- Total Reach (%): 20.4
- Total Reach ('000): 8,066
- Total Frequency: 8.1
- GRPs: 166

The campaign reached one in five of the online population who saw it on average 8 times

- 1st Target Reach (%): 40.2
- 1st Target Reach ('000): 2,065
- 1st Target Frequency: 11.5
- 1st Target GRPs: 465

In terms of the target audience the campaign reached two in five who saw it on average 12 times

Ad Category Placement Summary

Women 20-34

The Social Networking/Email category delivered two thirds of overall reach. Entertainment/gossip channels were the major contributors to frequency

Ad Category	Audience (000)	Audience Reach	Ads Per Person	GRPs
Total	2,065	100.00%	11.54	464.8
Entertainment/Gossip	170	8.21%	27.38	90.6
Health/Browsing/Dating	356	17.25%	7.84	54.5
Ad Networks	982	47.55%	4.60	88.1
Social Networking/Email	1,376	66.64%	7.00	187.8

EType Segments

All Exposures

EType Segments	Audience (000)	Composition %	Reach %	Composition Index
Thoughtful Spenders	860	10.7	17.7	86
Frequent Socialisers	1,408	17.5	27.3	134
Functional and Careful	1,521	18.9	19.5	95
Social Lifestyles	994	12.3	26.5	130
Occasional Purchasers	1,132	14.4	15.9	78
Active Online Spenders	723	9.0	33.2	162
Infrequent and Cautious Browsers	1,359	16.8	16.5	81
Unknown	70	0.89	20.2	99



Frequent Socialisers

Young people are the most active users of new technology for socialising. A strong bias towards the under 25's, living in rented accommodation. Incomes lower than average and, perhaps as a consequence they tend to spend less online than others.

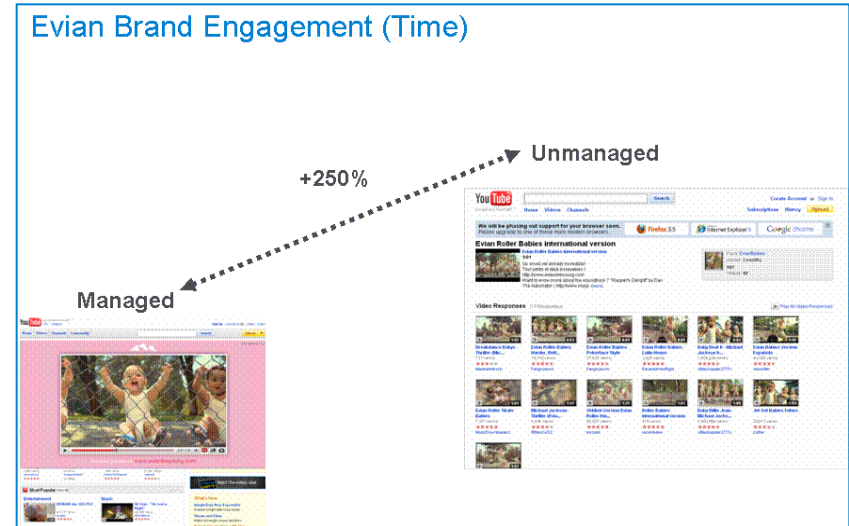
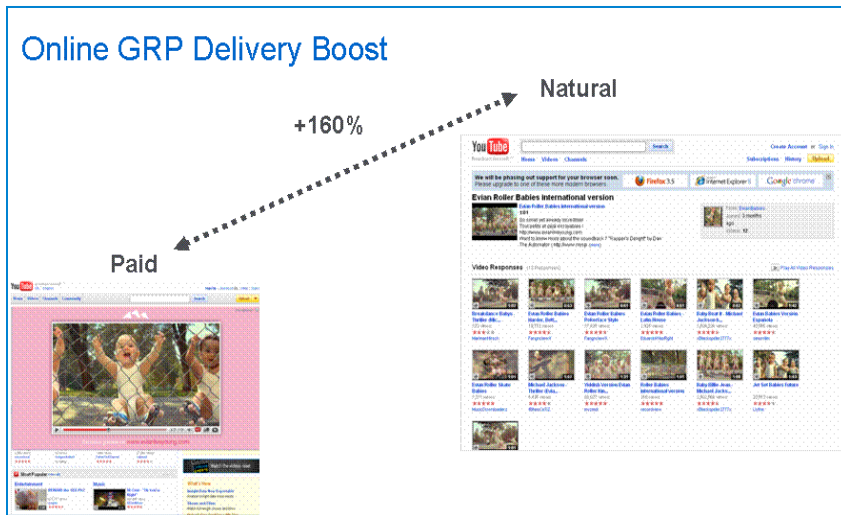
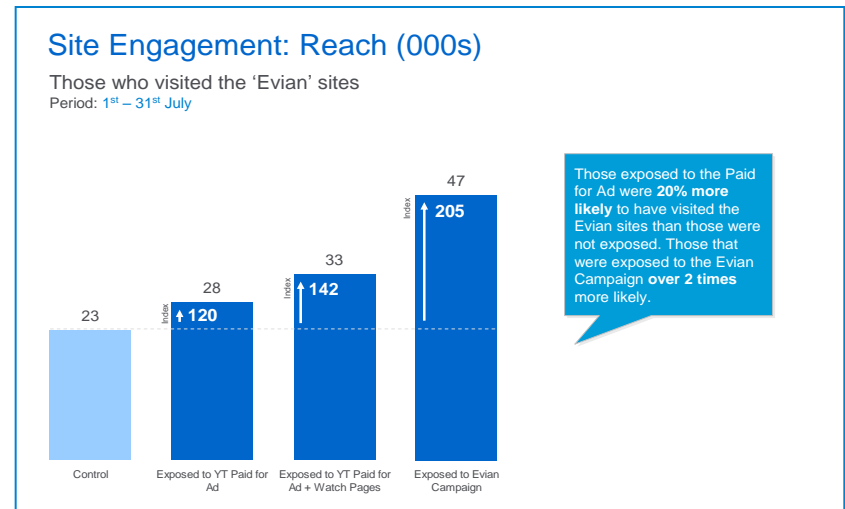
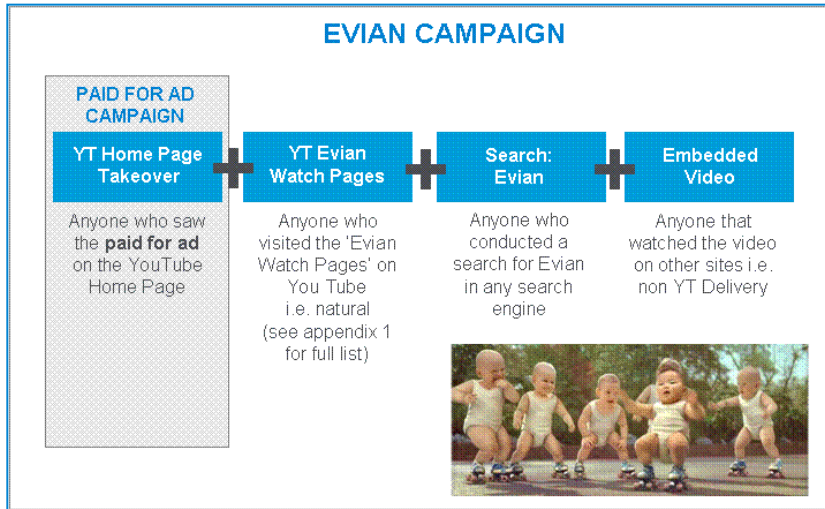
They are enthusiastic about downloading music, ringtones and TV programmes. Making significantly more use of social networking web sites than other groups. The immediacy of instant messaging is likely to be preferred to email. Includes the most prolific users of text messages and download the widest variety of things to their mobile phones. Immediacy of communication is a requirement of the fast pace of these youngsters' social world.



Social Lifestyles

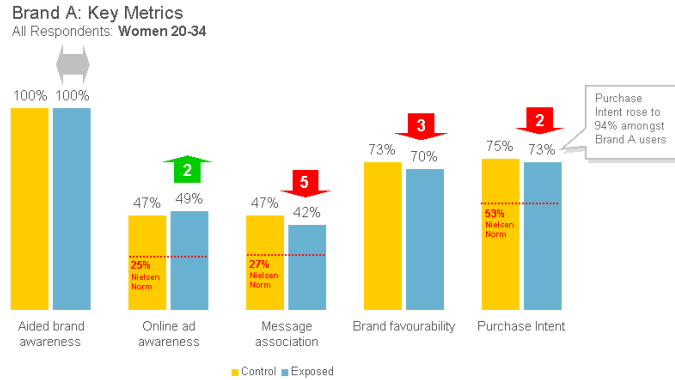
Younger couples and singles, starting to have responsibilities such as children and houses, are relatively experienced users of the net. They are not prolific or varied online spenders. Many will feel they rely on the Internet to plan their social activity and a broad mix of online social and leisure activity. They are more likely to take part in discussion groups, read and write blogs, read magazines or newspapers, share photos, download podcast, listen to music and regularly use instant messaging. They visit social networking web sites but are probably not prolific users. Their work / college activity is likely to involve regular use of the Internet. Other practical online activities might include job seeking, paying utility bills, and house or flat hunting. Comfort with the online community is a feature of these people's lives.

Did the campaign deliver virally?



What was the branding effect of rich media vs. standard?

Overall the campaign led to a small uplift in online ad awareness, but did not bolster Brand A's already high key metric scores.



*Favourability or Purchase Intent - Very/Somewhat

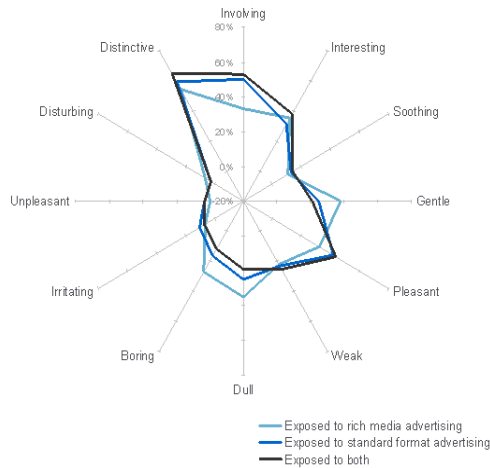
Standard media outperformed on all key metrics and perceptions except for the freshness attribute which came across stronger in this format

Results by Creative Exposure (Mutually Exclusive)	Control	Rich Media Δ	Standard Δ
Key Metrics			
Aided brand awareness	100%	0%	0%
Online ad awareness	47%	-3%	2%
Message association	47%	-3%	-6%
Brand favourability	73%	-11%	-1%
Purchase intent	75%	-13%	2%
Brand Attributes			
Statement 1	52%	-1%	1%
Statement 2	71%	-9%	2%
Statement 3	82%	-7%	4%
Statement 4	75%	-4%	0%
Statement 5	79%	-1%	3%
Statement 6	54%	2%	-1%

✓ Significant difference at 95% confidence limit

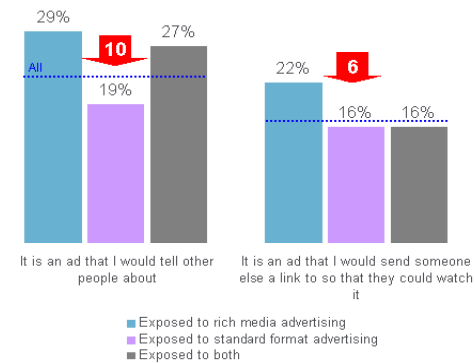
Standard formats displayed a stronger performance especially in terms of 'involving, distinctive and pleasant'

Creative Word Scores
Salad Station: **Women 20-34**



Rich media led to greater amplification of the message than standard format advertising

Amplification
Respondents: **Women 20-34**



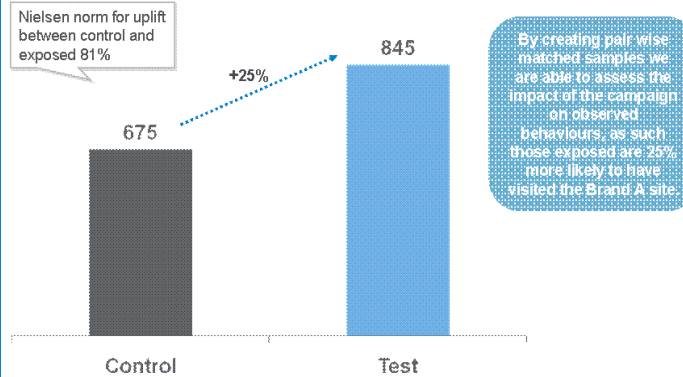
Did it drive online engagement?

Exposure Paths To The Brand A Site

- 632,000 went onto visit the Brand A post exposure
- 30% visited the Brand A site after one exposure, 62% after three exposures
- 35% of those exposed on ad networks visited the Brand A after one exposure

# Exposures		1	2	3	4	5	6 or more
Total	Audience (000)	191	124	75	39	17	186
	%	30%	50%	62%	68%	71%	100%
Health/ Browsing/ Dating	Audience (000)	23	9	5	3	2	33
	%	31%	43%	50%	54%	57%	100%
Entertainment/ Gossip	Audience (000)	33	4	4	1	8	5
	%	61%	69%	76%	78%	93%	100%
Social Networking / email	Audience (000)	84	35	24	26	14	49
	%	36%	51%	61%	73%	79%	100%
Ad Networks	Audience (000)	158	112	57	29	6	87
	%	35%	60%	73%	79%	80%	100%

Brand A Site Engagement Unique Audience



Base: All
Pair wise matching based on Age, Gender, Presence of Children and then Total Online Activity

Brand A Page Analysis Pre/Post Exposure Top Pages

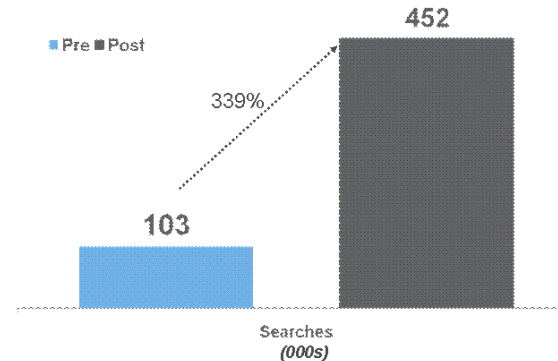
URL	Unique Audience (000)	Site Reach
Total	631,638	32.08%
http://www.brand a.co.uk/delivery/storeconfirm.aspx	238,024	12.17%
http://www.brand a.co.uk	231,038	11.73%
http://www.brand a.co.uk/delivery/basket.aspx	148,510	7.54%
http://www.brand a.co.uk/delivery/menu/	134,807	6.85%
http://www.brand a.co.uk/delivery/menu/default.aspx	131,201	6.66%
http://www.brand a.co.uk/delivery/default.aspx	120,800	6.14%

+116%

URL	Unique Audience (000)	Site Reach
Total	291,593	14.81%
http://www.brand a.co.uk	106,068	5.39%
http://www.brand a.co.uk/delivery/storeconfirm.aspx	104,573	5.31%
http://www.brand a.co.uk/delivery/menu/default.aspx	82,072	4.17%
http://www.brand a.co.uk/delivery/basket.aspx	72,134	3.66%
http://www.brand a.co.uk/delivery/	66,804	3.39%

Sample Sizes Pre 322 Post 770

Search Activity: Pre & Post Exposure



Sample: 257

A Truer Reflection of Online ROI

Drive to Advertiser Site

Post Exposure

5,682

Exposed to Consumer Electronics Ad (000s)

79

Exposed to Ad who visited Advertiser site (000s)

1.4%

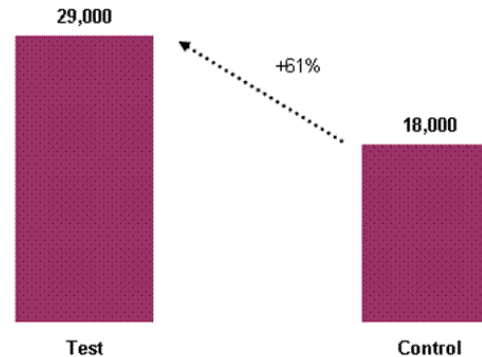
Percentage of those exposed to the Ad who visited the Advertiser site

x7 CTR

Conversion Analysis

Secure Audience

X6 ROI



URL	Audience
Total	29,000
https://www.brand-uk.co.uk	29,000
https://www.brandshar.com/shop-uk/checkout.php	9,000
https://www.brand-uk.co.uk/brands/brands-stylers.php	5,000
https://www.brand-uk.co.uk/brands-purple-stylers-giftret.php	4,000
https://www.brand-uk.co.uk/order.php?puiple=1#purple	3,000
https://www.brandshar.com/shop-uk/checkout.php?payment_escmpay_api	3,000
https://www.brand-uk.co.uk/order3.php	3,000
https://www.brand-uk.co.uk/order2.php	3,000
https://www.brand-uk.co.uk/brands/brands-stylers-stylers.php	2,000
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https://www.brandshar.com/brands-imitations/site-verification.php	2,000
https://www.brandshar.com/brands	2,000
https://www.brandshar.com/shop-uk/checkout_success.php	2,000
https://www.brand-uk.co.uk/brands-dark_or_pure_style.php	2,000
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https://www.brandshar.com/shop-uk/checkout_confirmation.php?esC=dd33a1f6b8msojdb8484	1,000
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https://www.brandshar.com/uk/stylers	1,000
https://www.brandshar.com/uk/brands-iv-purple-stylers	1,000
https://www.brandshar.com/uk/brands-iv-pink-stylers-2008	1,000
https://www.brandshar.com/uk/brands-iv-stylers	1,000
https://www.brandshar.com/shop-uk/shopping_cart.php?esC=dd33a1f6b8msojdb8484	1,000
https://www.brandshar.com/shop-uk/shopping_cart.php?esC=dd33a1f6b8msojdb8484	1,000
https://www.brandshar.com/shop-uk/checkout_confirmation.php?esC=dd33a1f6b8msojdb8484	1,000
https://www.brandshar.com/shop-uk/checkout_confirmation.php?esC=dd33a1f6b8msojdb8484	1,000
https://www.brandshar.com/shop-uk/checkout_confirmation.php?esC=dd33a1f6b8msojdb8484	1,000
https://www.brand-uk.co.uk/order.php?payment_escmpay	1,000
https://www.brand-uk.co.uk/brands-pure-stylers.php	1,000

2009 Sample Client List for Ad Effectiveness

- Trade Bodies

- IAB UK, IAB France, AOP UK

- Publishers

- Google, MSN, AOL, Guardian, Dailymotion,
- Channel 4, Orange

- Networks

- Specific Media, Glam Media

- Agencies

- Starcom, Havas, Zenith Optimedia

- Advertisers

- Evian, Chanel, Kraft, Red Bull, Pizza Hut, Sony Pictures, Nikon, Walkers, Renault, L'Oreal, COI, Societe Generale, Lancome, Direct Line, Volkswagen, BA, Vodafone, BMI, Virgin Atlantic, Three, Aviva, McDonald's, MBNA, GDF, RIAS, AGF, Carrefour



Because you're worth it...

By using tools such as *Market Intelligence*, *Predictive Profile Targeting* and *Ad Effectiveness*, it gives media researchers the ability to directly prove the value of their research to the value of advertising revenue