



CONNECTION
THE WORLD
AUDIENCES
SUMMIT 2013

BEYOND THE TRADITIONAL

groupm

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KANTAR MEDIA

AGENDA

Five basic questions regarding Data Overlays

- ◆ Is this approach a “new measurement” initiative
- ◆ Traditional approaches work today, but it must change,
- ◆ Are data overlays just for media planning buying, and strategic insights
- ◆ Can this be a game changer?
- ◆ What are the next steps

VIDEO: PLANNING BUYING AND ACCOUNTABILITY

◆ Situation

- ◆ Fragmentation within TV (More Channels) and across Devices (Video Everywhere)
- ◆ Problems with Measurement
- ◆ Accountability issues – Ratings down, Cost Up, is this still a viable medium

◆ Need

- ◆ Comprehensive Measurement
- ◆ Tied to what Clients want/need (their products)
- ◆ Better Analytics on the backend to prove and improve

IS THIS NEW?

No, not conceptually

- ◆ Recent Attempts
 - ◆ Scan America 1991 Arbitron
 - ◆ Project Apollo 2006 Nielsen and Arbitron
- ◆ Syndicated Fusion Data
 - ◆ MRI-NTI Fusion
 - ◆ Spectra – NTI Fusion
 - ◆ Media Behavior Institute
- ◆ Modeling
- ◆ Data Matching

TRADITIONAL PLANNING APPROACH APPROACH

Look at Product consumers, Identify a Demographic, Identify Demo's Media Choices



TRADITIONAL BUYING APPROACH

Select networks that have programs that have viewer profile that matches the profile of the consumer



TRADITIONAL APPROACH WORKS BUT THERE ARE CLOUDS ON THE HORIZON



WHAT IF WE LOOK AT THIS DIFFERENTLY

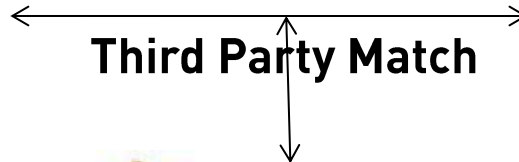


OVERLAYING PURCHASE BEHAVIOR WITH VIDEO CONSUMPTION BEHAVIOR (RPD)

KANTAR RETAIL



&



Third Party Match



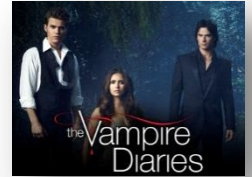
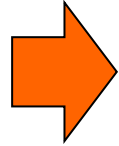
Tuning
By Network, Program,
Commercial



Matched Panel :Representative and Actionable

IDENTIFY THE BEHAVIOR

Select networks that have programs that are watched by the actual consumer



FACTORING COST WITH PRODUCT USAGE PROPENSITY CAN IMPROVE EFFICIENCY AND ROI

TV viewing profiles can be matched to product purchase behavior

	Corp % of GRPs	Price Index	Brand A	Brand A % GRPs	Brand B	Brand B% GRPs	Brand C	Brand C % GRPs
Network	100%		117	100%		100%		100%
ABC	43%	90	121	7%	115	36%	119	19%
CBS	26%	103	130	28%	109	42%	120	58%
FOX	9%	115	135	29%	125	0%	125	0%
NBC	23%	92	116	35%	105	22%	113	23%
Cable	58%		98	52%		43%		40%
BRAV	9%	130	110	2%	112	2%	114	2%
FOOD	10%	118	112	15%	129	2%	117	1%
HGTV	14%	140	90	23%	109	9%	82	7%
LIFE	1%	107	133	2%	109	4%	103	11%
TBS	4%	87	105	2%	121	7%	131	1%
TNT	4%	91	96	4%	98	2%	95	6%
TVL	7%	65	113	2%	116	16%	100	4%
USA	3%	81	98	2%	122	0%	107	9%
AD SWM	4%	99	71	--	89	0%	85	0%
COMEDY	2%	111	76	--	102	0%	132	0%

SEGMENTING PURCHASES TO LOYALISTS AND SWITCHERS CAN DRIVE ROI EVEN FURTHER

	Prime CPM Index	Category Purchasers		Brand Loyalists		Brand Switchers	
		Whole Day	Prime	Whole Day	Prime	Whole Day	Prime
ABC	90	108	117	107	95	116	118
CBS	103	128	111	141	162	124	127
FOX	115	134	134	148	133	125	120
NBC	92	97	111	115	78	105	99

CABLE ALSO PROVIDES CUSTOMER SEGMENTATION OPPORTUNITIES

Time Periods	Brand A Share of \$	CPM Index	Category Purchasers	Brand Loyalists	Brand Switchers
			Whole Day	Whole Day	Whole Day
TV LAND	1%	65	140	116	121
USA	2%	81	121	146	115
LIFETIME	1%	107	101	92	107
TBS	1%	87	110	77	105
HGTV	25%	140	98	127	100
TNT	2%	91	106	98	106
BRAVO	8%	130	75	55	
FOOD	18%	118	91	48	102

ALIGNING NETWORK PORTFOLIO TO REFLECT PRODUCT PURCHASE BEHAVIOR CAN DRIVE BETTER EFFICIENCY AND ROI

CABLE	Brand A Mix	
	Current	Proposed
TV LAND	1%	5%
USA	2%	15%
LIFETIME	1%	7%
TBS	1%	6%
HGTV	25%	15%
TNT	2%	2%
BRAVO	8%	5%
FOOD	18%	10%

NETWORK	Brand A Mix	
	Current	Proposed
ABC	4%	4%
CBS	18%	40%
FOX	48%	48%
NBC	24%	8%

	Category Purchasers	Brand Loyalists	Brand Switchers
	Whole Day	Whole Day	Whole Day
Current Target Index*	101	103	105
Revised Target Index	113	115	112
Lift	13%	11%	7%

GATHERING INSIGHTS



WHAT IF PROGRAMMERS AND NETWORKS SALES THOUGHT THIS WAY

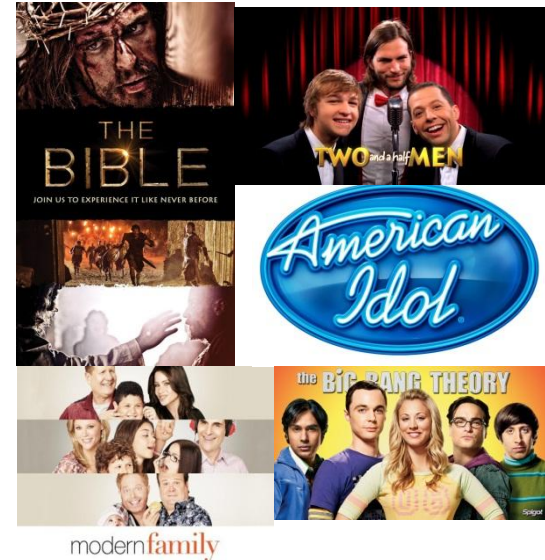
Road Warriors



Investors



Heavy Retail





**CHANGE
AHEAD**



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THE FUTURE OF VIDEO CONTENT GOES WAY BEYOND A BIG SCREEN, A CABLE BOX AND A LINEAR STREAM



WHAT'S NEXT : SIMPLIFYING THE PROCESS



THE "EARTH" WITHOUT
"ART"
IS JUST
"EH"



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