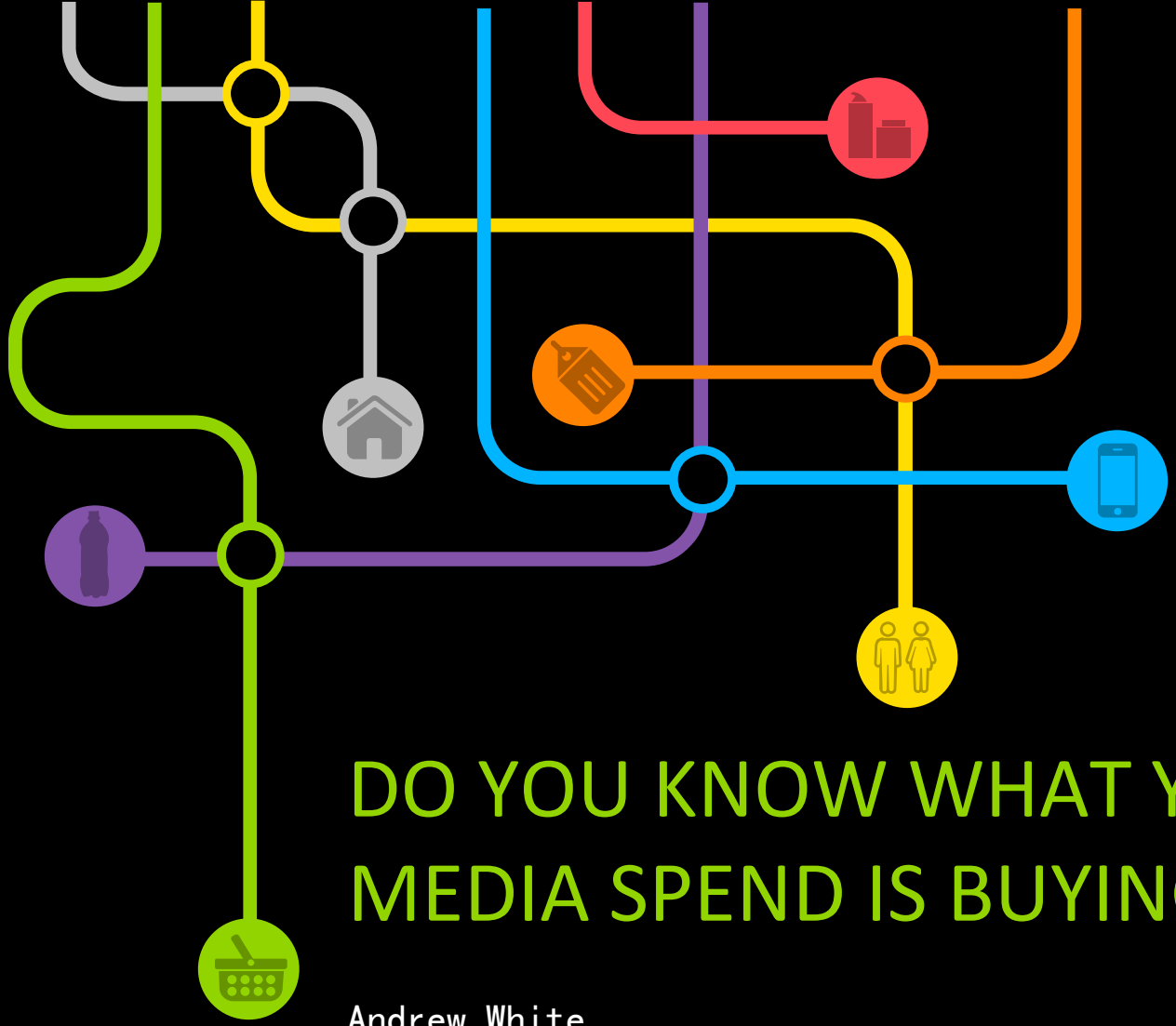


DO YOU KNOW WHAT YOUR MEDIA SPEND IS BUYING?

Andrew White

AGENDA

- Media Landscape in China
- TV vs. Online: The Big Debate
- Measuring Success: What does it look like?

MEDIA LANDSCAPE

China Today

in China in 2012

Over **¥200bn**

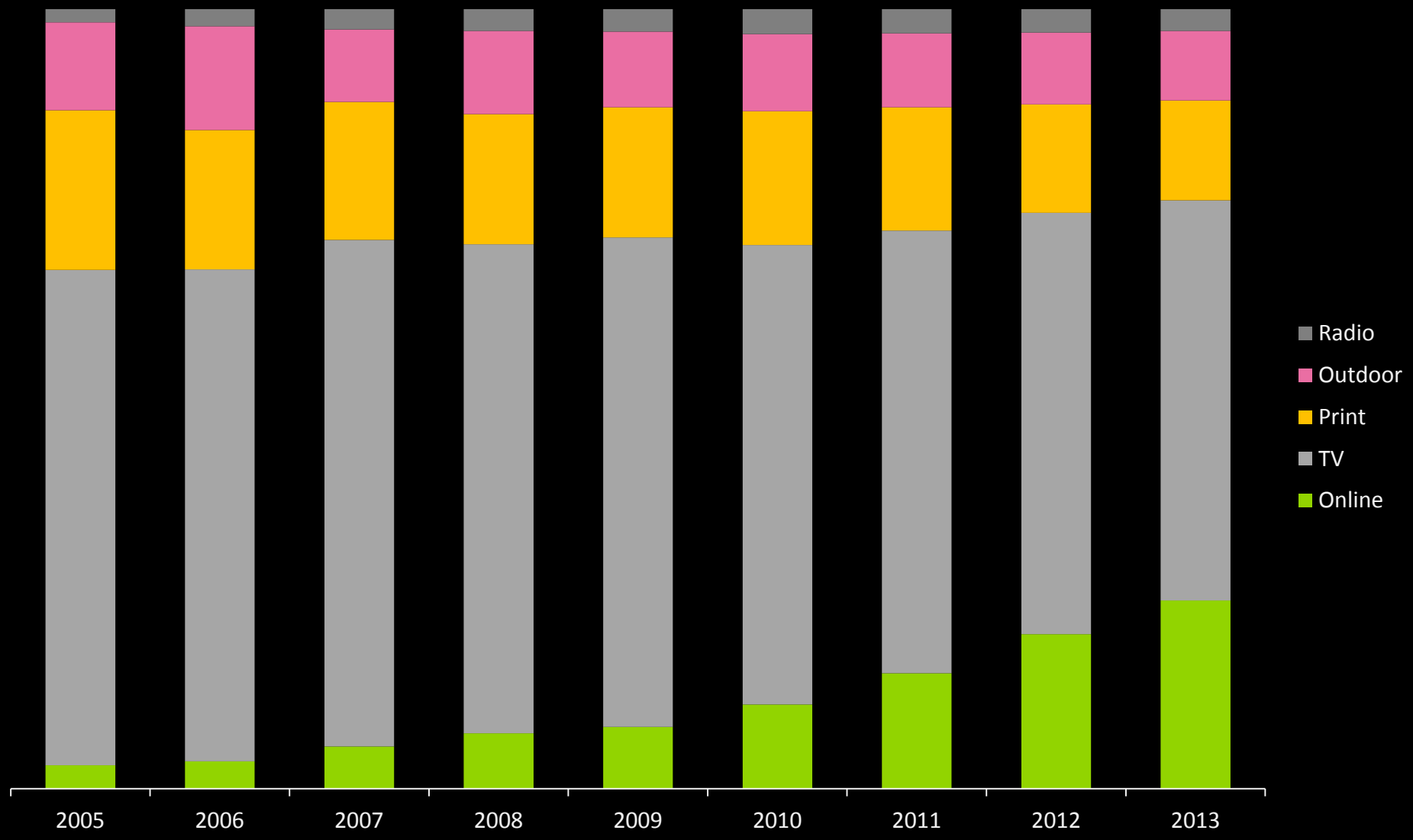
was spent on TV advertising alone

Online spend grew **50%**

year-on-year

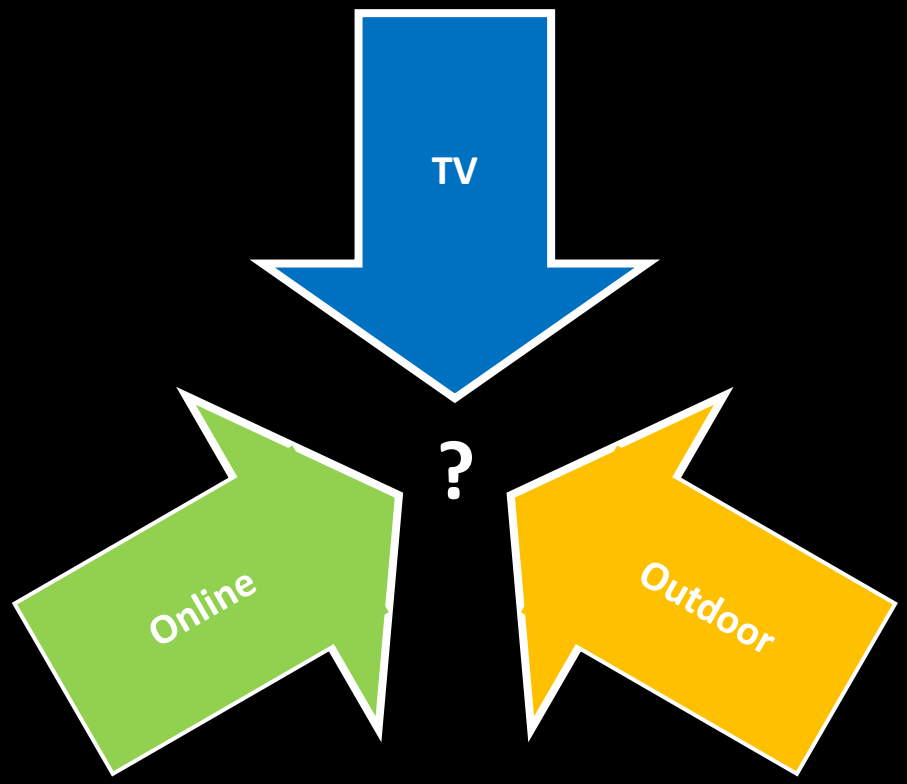
..but how much of it had a measureable return?

The landscape is changing..



% of Overall Spend. Source: GroupM, Dec 2012

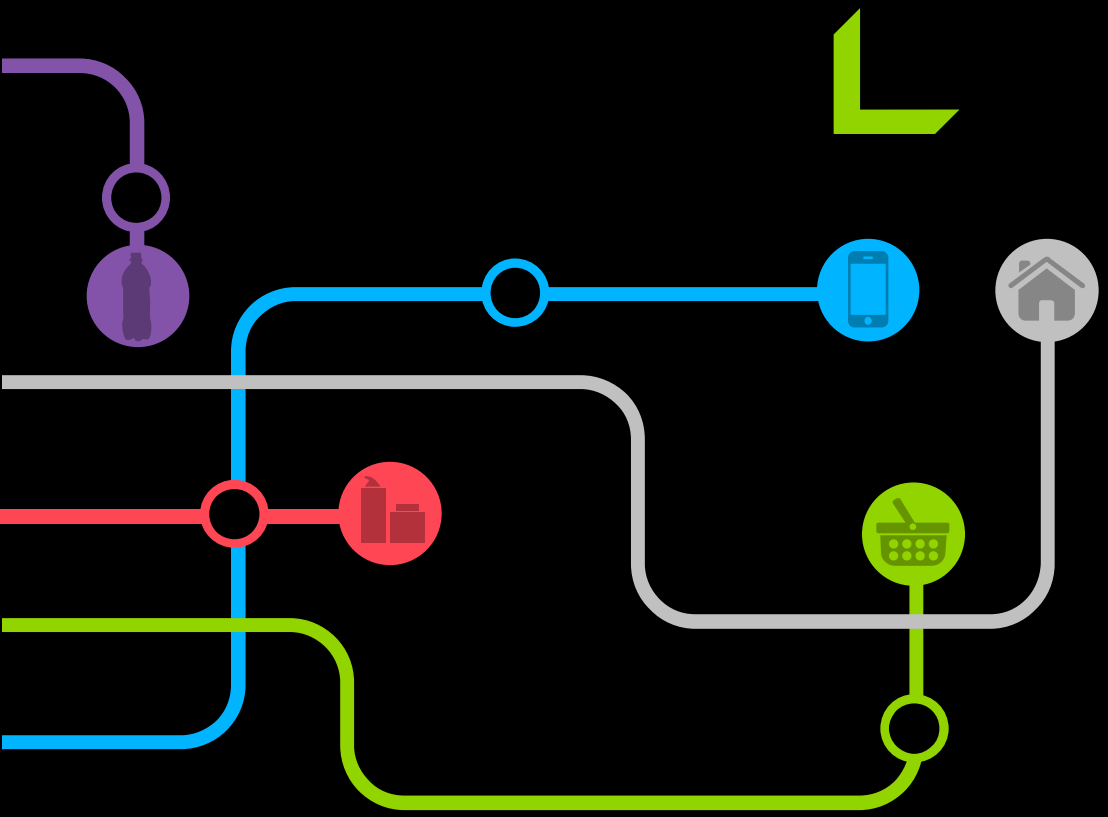
..but which channel is delivering what?



This level of investment needs facts!

TV vs. ONLINE

The Big Debate



KANTAR WORLDPANEL a CTR service in China

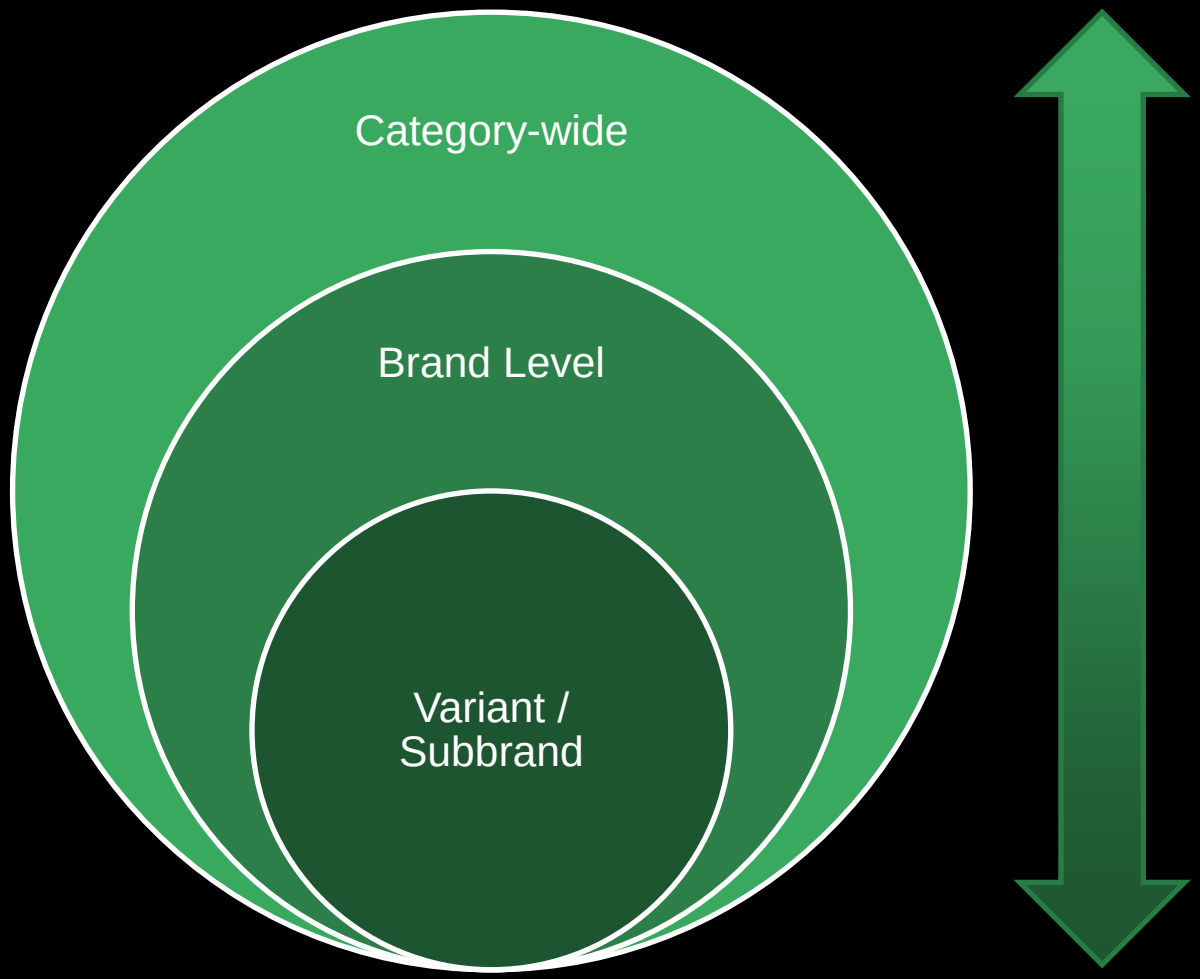
CONSUMER CONNECTION 2013

TV: Reaching an audience no other channel can

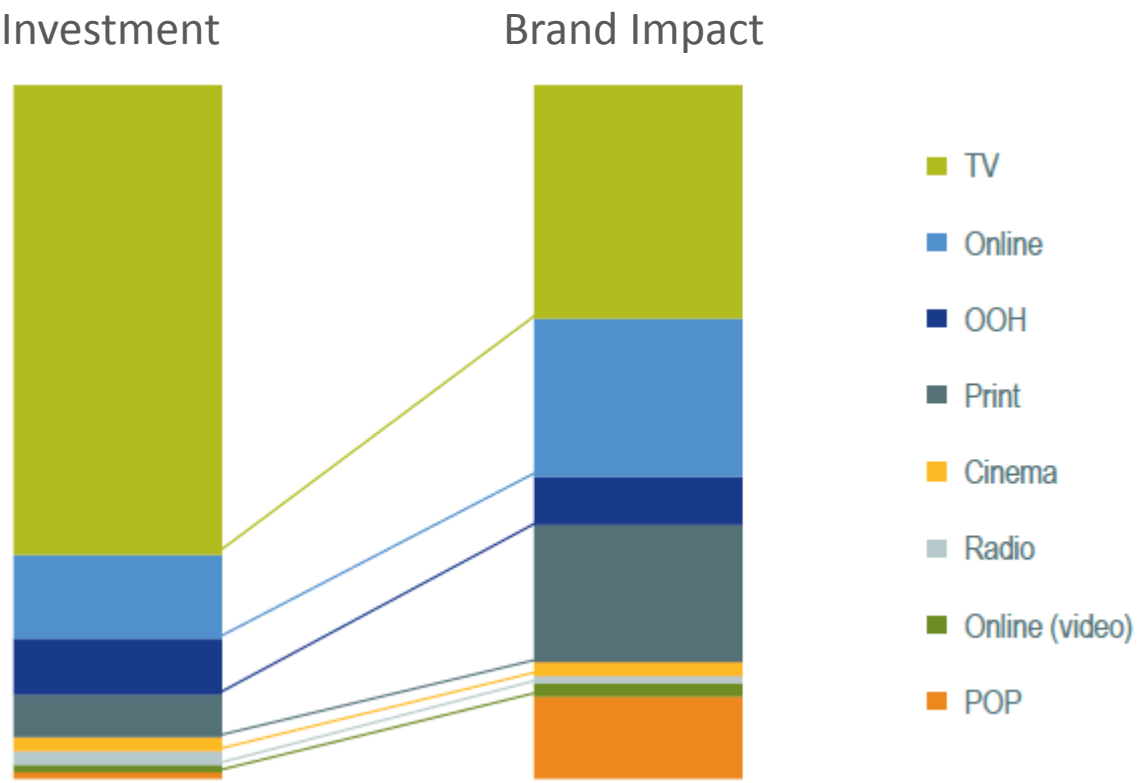
Online: Different approaches give Different results

Online: Different approaches give Different results

Different Impacts: where do you need focus?



..but other channels are still key to Brand building

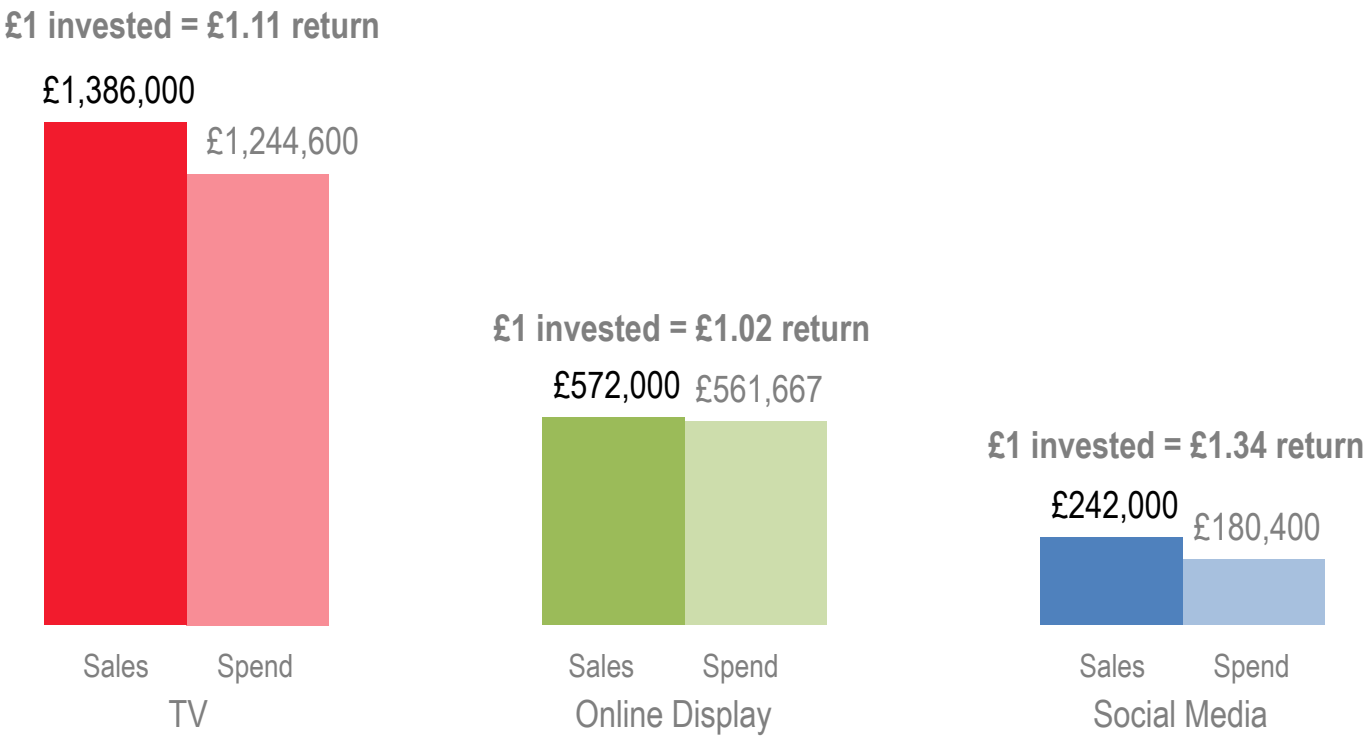


Global study by Millward Brown, 2013

MEASURING SUCCESS

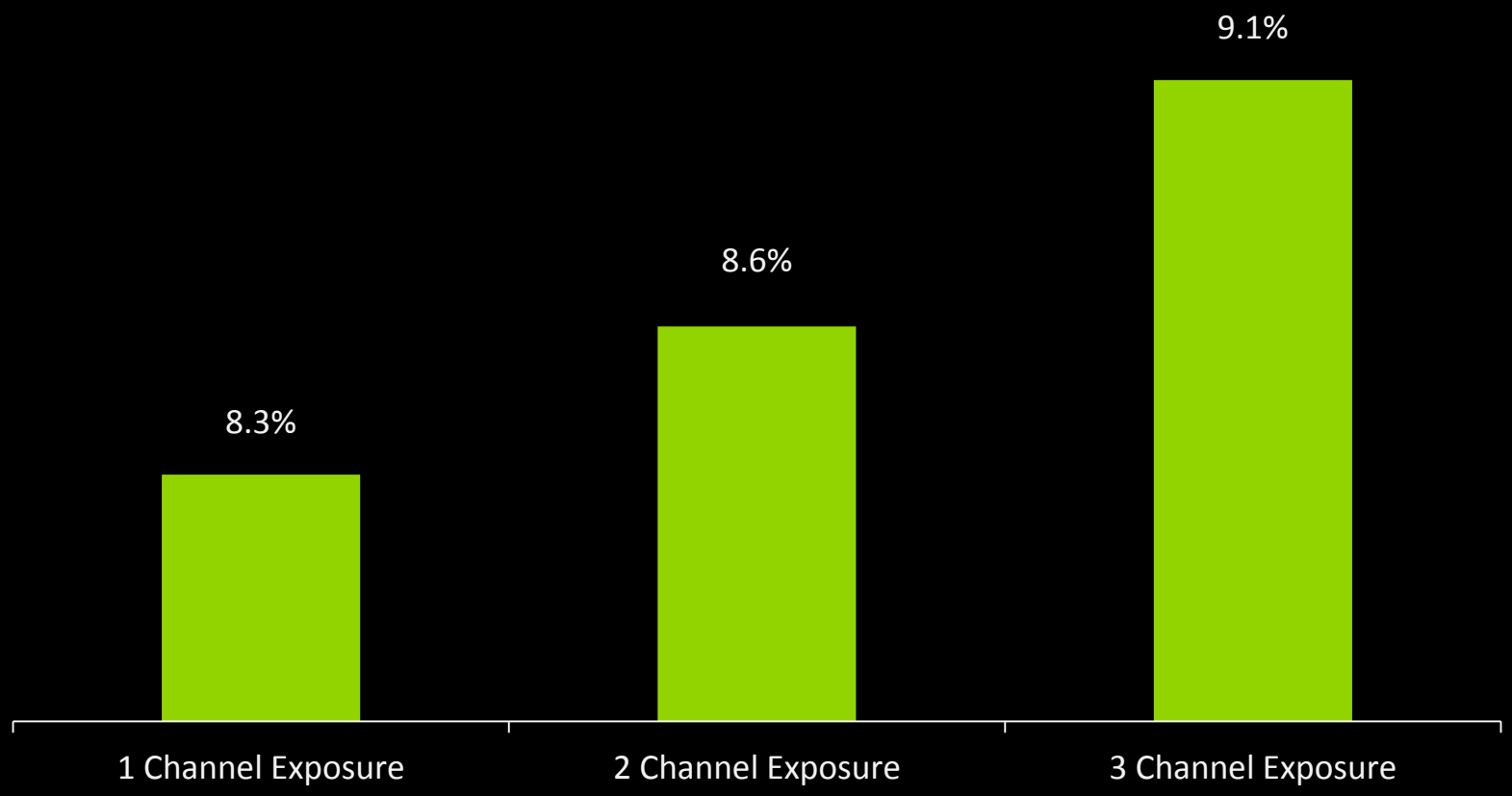
What does it even look like?

Case Study: UK campaign, ROI by Channel



Costs including Production

..and understanding sales uplift from **multiple** channel exposure is even more useful



% Sales uplift vs. control

..but ROI is just a number.

Where do those sales come from?

Repeat Buyers

New to Brand

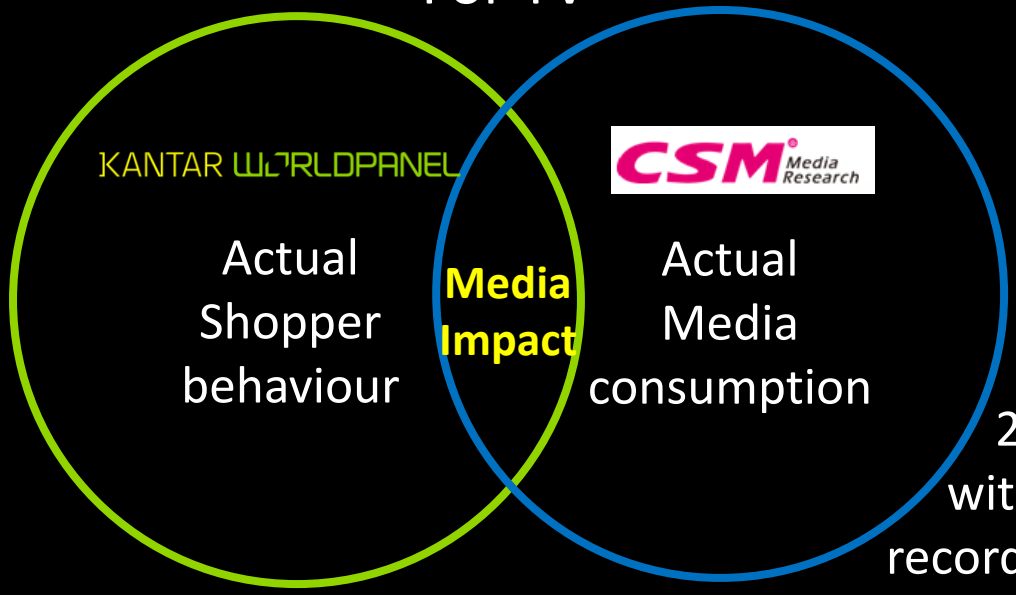
New to Category

Repertoire Buyers

Promotion Hunters

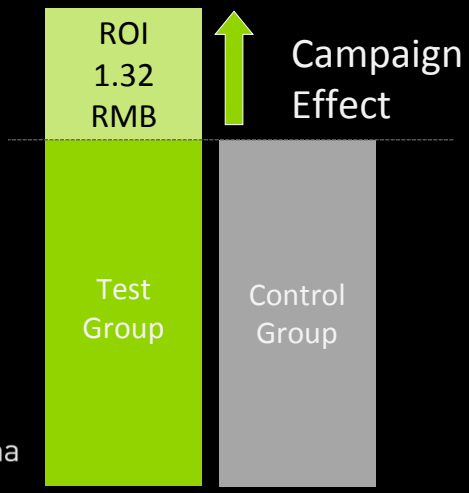
How can we measure all of this?

For TV



For Online

26,000 panelists with embedded Tags recording each Ad viewing



A **consumer-led** understanding of Media effectiveness is the only way to plan for **integrated campaigns** across an increasingly fragmented landscape

Understanding which channel is driving what behaviour is key to **optimising** campaigns for the future..