

consumer
360

The Nielsen Annual Client Conference

Date: May 16, 2007



Realising opportunities in the

dynamic

Retail, Media and Consumer environment

nielsen
.....

In the Spirit Of Sports....

(... much beyond a media option !)

Cricketing GRR..eats!

consumer
360



What came to your mind...?

...while watching these moments!?

It's a matter of perspectives...

- ✓ Wasim bowls a beauty...
 - ✓ Vivian Richards does another bowler
 - ✓ Sir Gary Sobers cuts & bleeds another bowlers statistics
 - ✓ ...
- Ground Paintings + T-Shirt Logo
 - Perimeter Board
 - First Level Stadium Signage

This would have set you...

- Thinking
 - “Do viewers really see it that way we just did?”
- Introspecting
 - “How do I leverage any opportunities, if they present themselves to ensure better ROI from associations?”
- Questioning
 - “Is there any robust metrics that I could rely on while evaluating association opportunities?”

Inspired by these thoughts...

TAMs' S-Group took up...

The Challenge

- For...
 - Measuring the on-screen time of non-standard form of brand exposure
 - Enable users with the ability to access media reach & incremental media value through fusion with the TAM Viewership Panel
 - Ascertaining differential impact of non-standard to standard forms of advertising in sports



Measure Impact of Non TVC Brand Exposure

- Non TVC includes on air promotions apart from commercials
- In-stadia placements
- Team Specific Platforms

The Methodology

Fieldwork : Nielsen Media Company

- A panel based study in Mumbai
- Combination of Diary and DAR method incorporating the finer elements of both
- Diary to keep track of the respondents' viewing of the match.

- Day After Recall used for Pre Selected matches
- Respondents queried only once to avoid biased responses for other matches

Respondent Selection

- Regular Viewers of cricket based on past viewership
- Highly likely to watch the ICC Champions Trophy, and specifically a few pre selected matches

Top Lines

Definition : OTS

- Opportunity to see : a product of no.of respondents and the number of instances where the brand or the platform was visible on TV during the selected matches.
- OTS : No. of Respondents X No. of on air insertions

OTS - Brands

- **TOTAL OTS** – Across all matches, all brands, all platforms - 4217064
- **TOP 5 Brands** - (Hero Honda, CBZ, Hutch, LG, Pepsi)
- **TOP 8** – TOP 5 + (Servo, XtraPremium, Standard Chartered Bank)

TOP 5 Brands	3030327	72%
TOP 8 Brands	3457176	82%
Others	759888	18%
TOTAL	4217064	100%

OTS - Platforms

- **On Ground** – Perimeter Board, Ground Painting, Sight Screen, Electronic Screen, Stumps, Placards, Pavilion Banner, Commentator's Room, Drink's Trolley
- **On Screen** – POP up & Scroller
- **Team Specific** – Bats & Wearing Kits

On Ground	3224523	76%
On Screen	654592	16%
Team Specific	337949	8%
TOTAL	4217064	100%

Distribution of OTS – Top 8 Brands on Non-TVC

- The top 8 Brands on Non-TVC account for
 - 96% of On Ground OTS
 - 47% of On Screen OTS (24 brands account for the rest 53%)
 - 17% of Team specific OTS (8 brands account for the rest 83%)

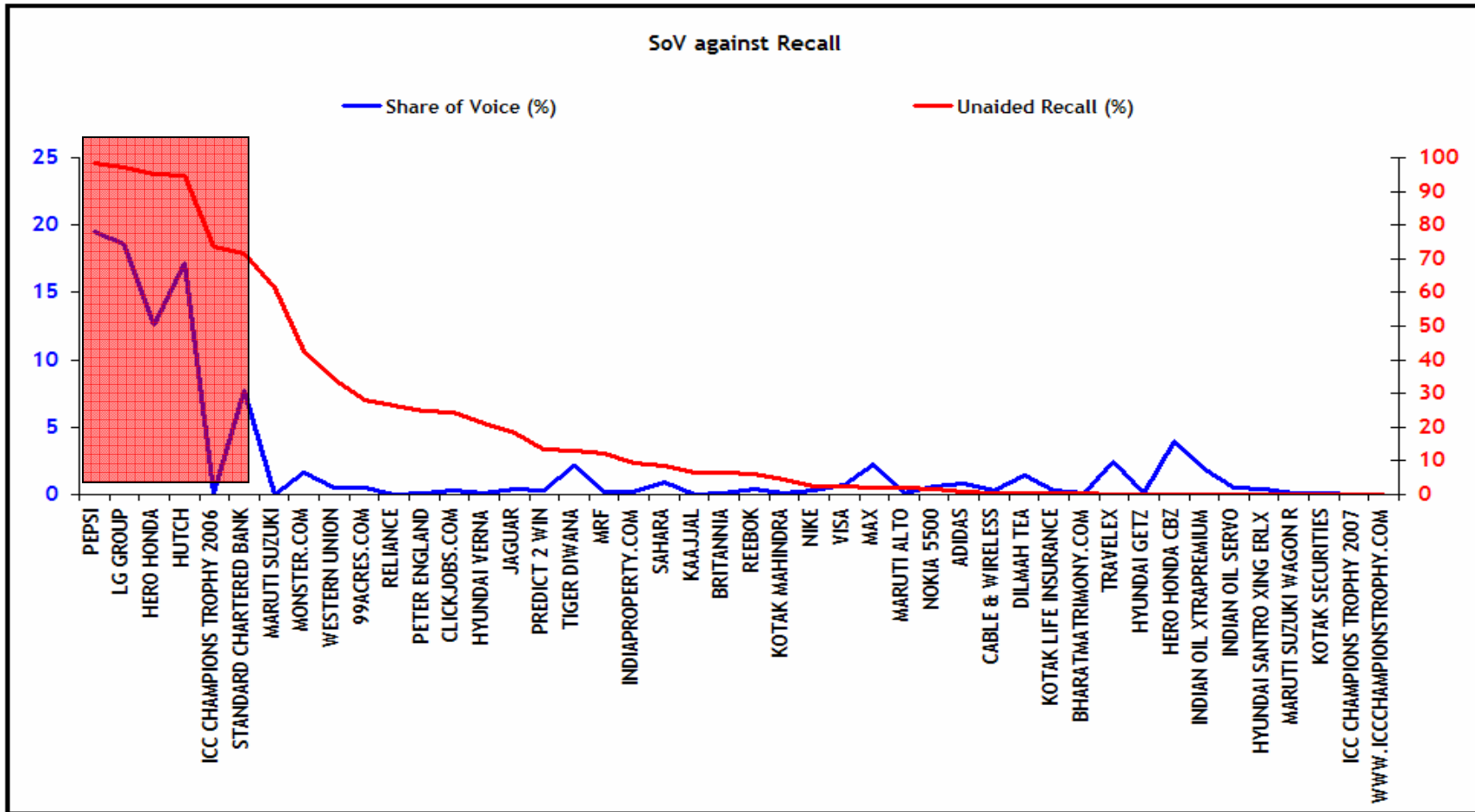
	On Ground	On Screen	Team Specific	TOTAL
TOP 5 Brands	2954244	17134	58949	3030327
TOP 8 Brands	3092114	306113	58949	3457176
Others	132409	348479	279000	759888
TOTAL	3224523	654592	337949	4217064

How Effective is Non-TVC?

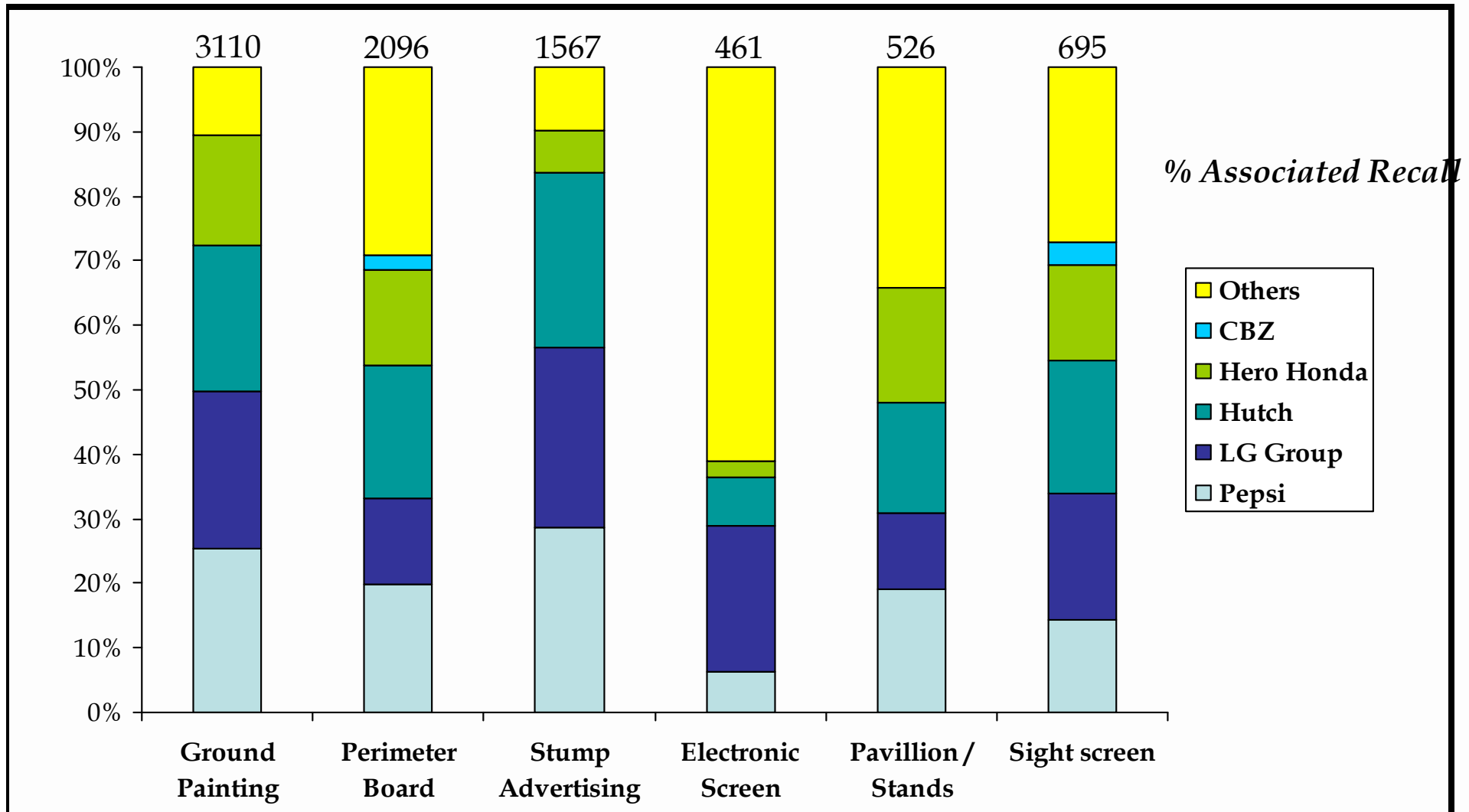
Factors influencing IMPACT

- Opportunity To See (OTS)
 - Measure from Research
 - Viewing Population by Over segments (Dairies)
 - Appearances by Over Segments (TAM)
 - Simple multiplication of above two
- Associations
 - Measure from Research
 - Respondents aided with platforms
 - Asked for brands recalled on these platforms
 - Thus – Associated Recall
 - Further – Filtered for Proven Association

Brand Recall Not Identical – Top 5 Dominate..!



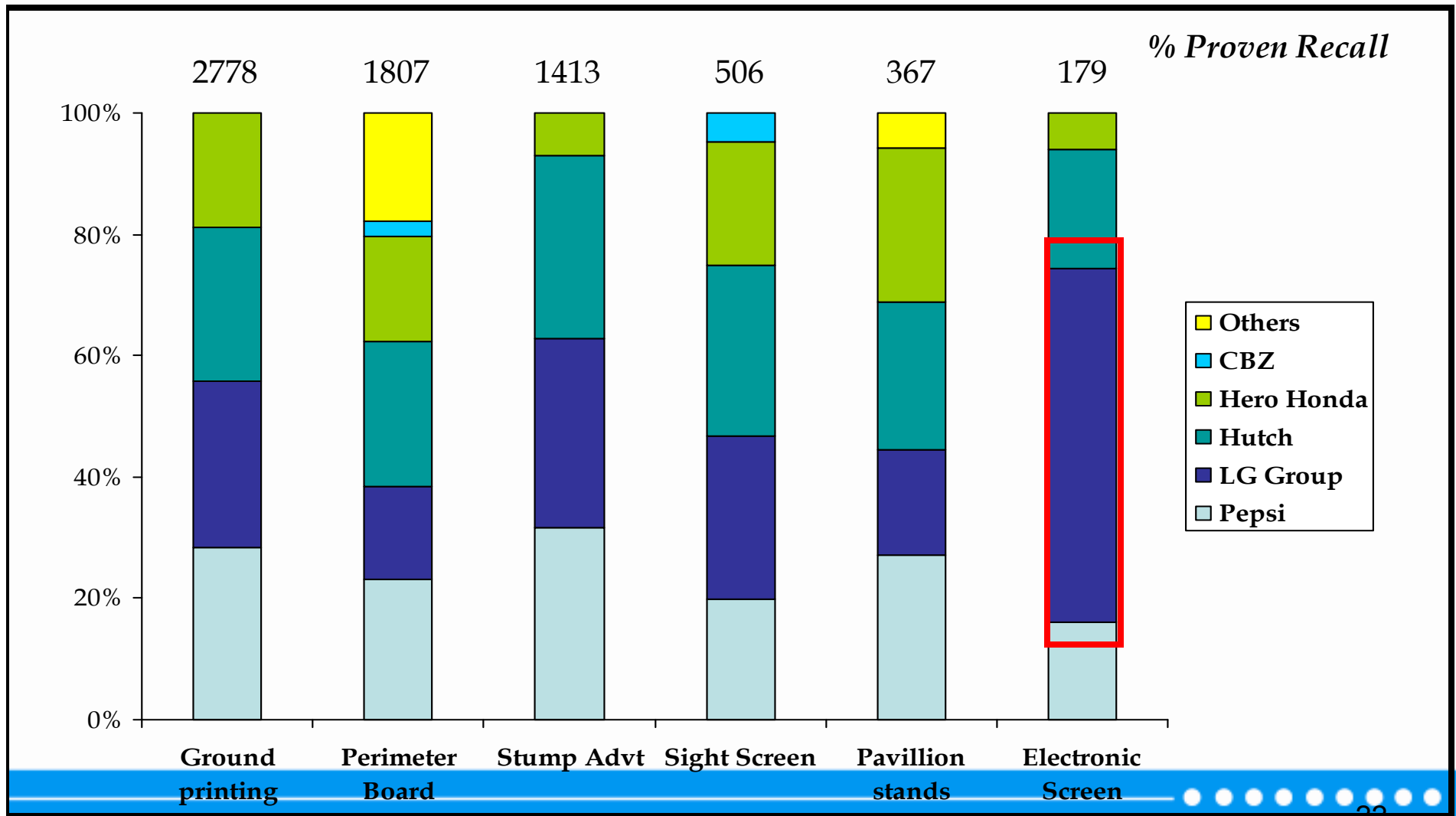
Platform-associated brand recall was NOT uniform...!



Proven platform-associated recall

=

Single-brand presence => Best ROI...!!

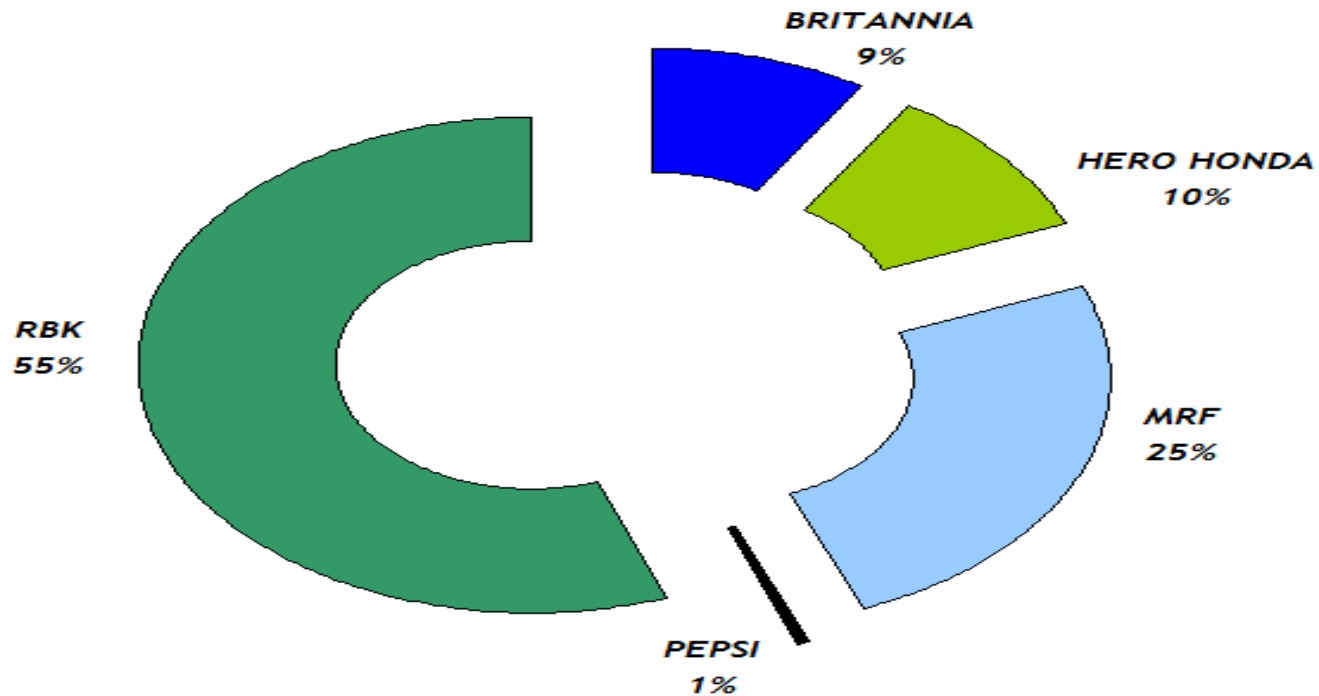


Effect of Previous Associations

Perseverance Pays...

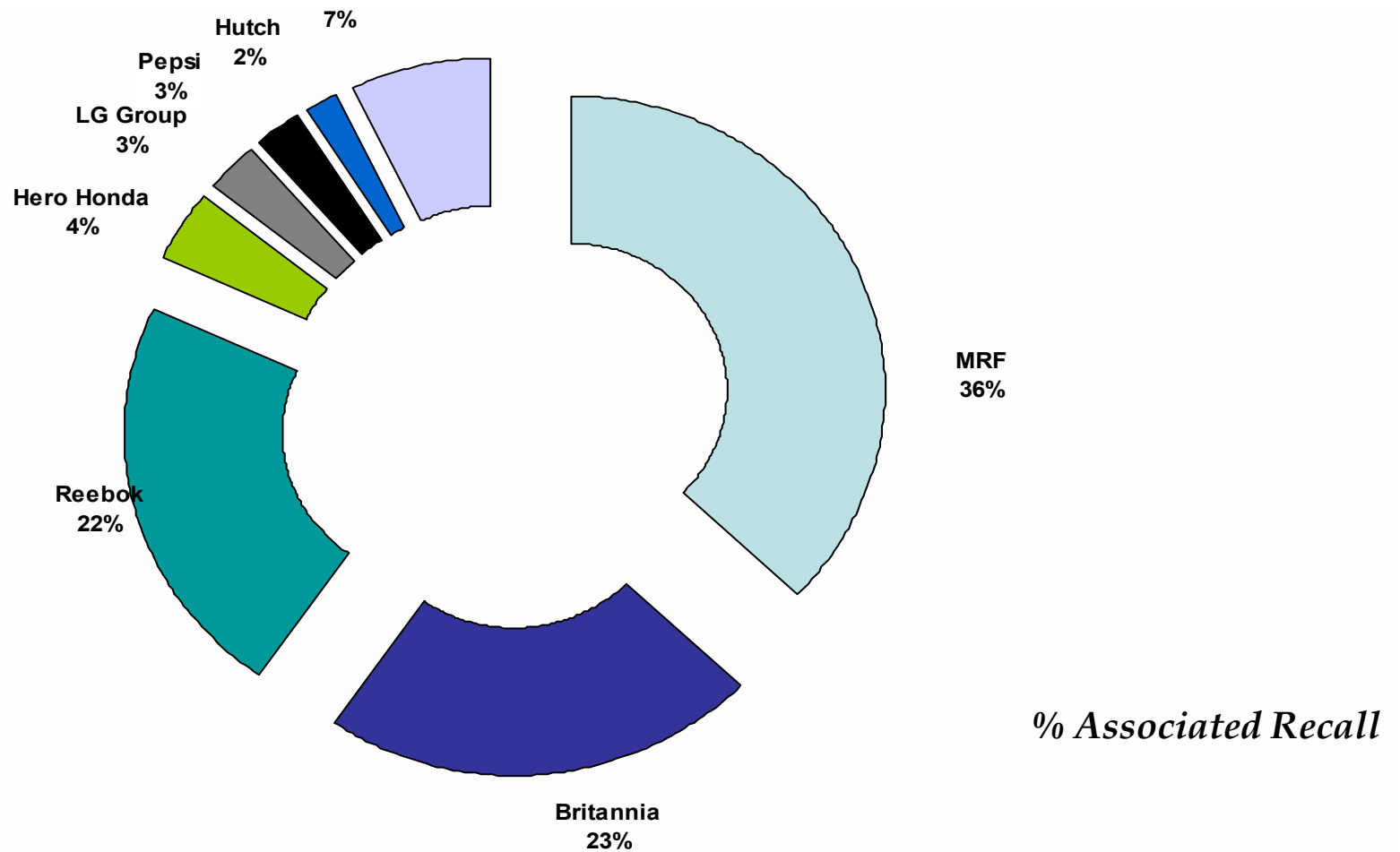
Share of Voice – Brands on Bat stickers

SoV - Brands on Bat Stickers



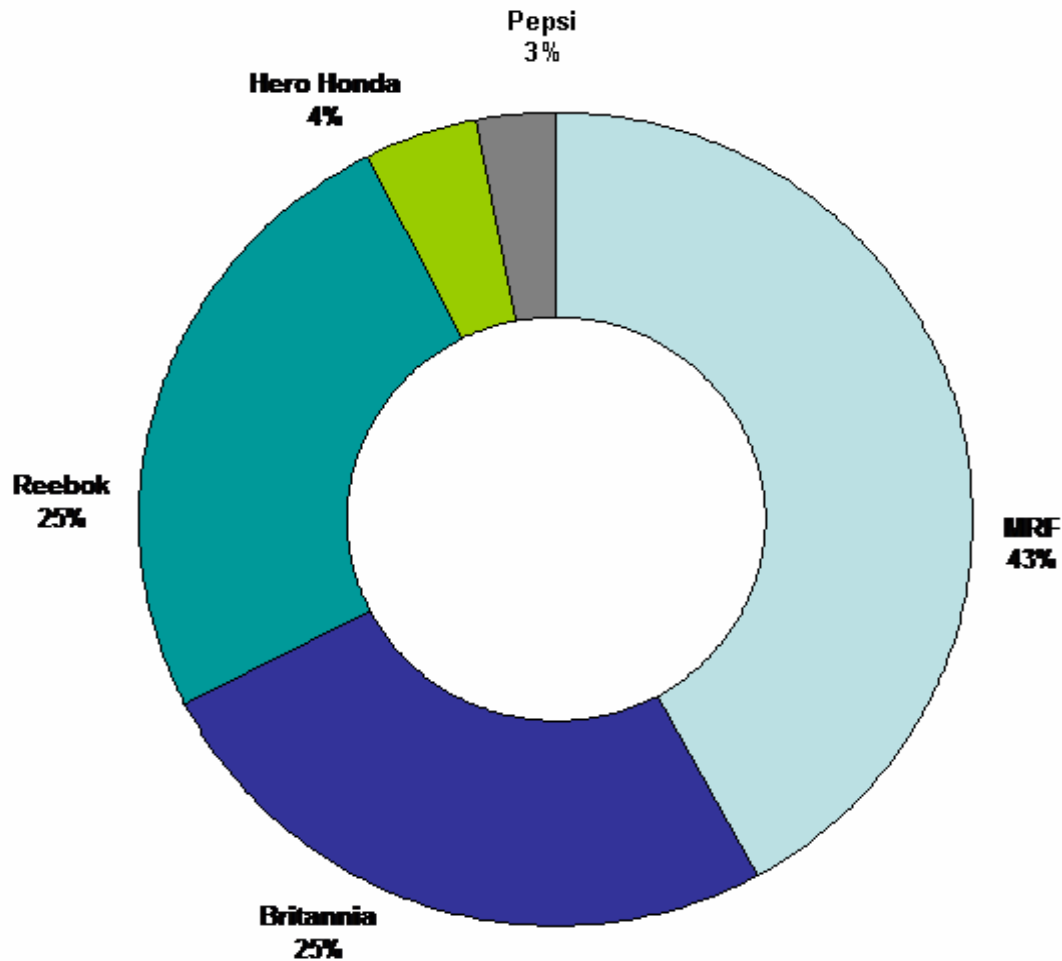
Reebok has the highest presence on the BAT stickers

Share of Voice – Brands on Bat stickers



Unaided recall in favour of MRF on Sachin and Lara's shoulders

Share of Voice – Brands on Bat stickers



% Proven Recall

Proven Recall further favors Brands which have had previous Associations

Platform Efficacy – Some of the platforms have higher recall though they have lesser coverage..!!

TOP PLATFORMS	SoV	Proven Recall
<i>PERIMETER BOARD</i>	34	1807
<i>GROUND PAINTING</i>	32	2778
<i>POP UP</i>	9	187
<i>Wearing Kit</i>	7	628
<i>SIGHT SCREEN</i>	7	506
<i>SCROLLER</i>	7	626

Frontiers...

- Significant insights from the benchmark study are being mined
- The factor analysis is certain to throw up metrics that will shape a currency for sports sponsorship management
- Great minds think alike – Like Minds are sought to realize this dream

Thank You

Presentation uploaded on – www.tamindia.com

Presenter – pradeep.hejmadi@tamindia.com