

ONLINE VISIONS TV + Online: 2012

Working together for more effective advertising



The yardstick could not have been higher for ONLINE VISIONS 2012. ONLINE VISIONS 2010 proved the efficiency of combined TV and online advertising. It also demonstrated successfully how we have to plan Internet advertising in the context of different types of perception and usage. But then the market began to ask: how can TV online contacts be fine-tuned? Which combination of online formats leads to the maximum effect – and which method of allocating Internet advertising over the course of a day and week? And, what are the requirements that cross-media creative advertising has to fulfill?

Following a complex, uniquely designed survey involving three actual Procter & Gamble campaigns and more than 6,000 interviews, ONLINE VISIONS 2012 can now answer the questions which today's market is posing. It can also deliver solid findings that can be used right away in strategic TV/online planning.

The ONLINE VISIONS series of surveys is the kind of high-end sector initiative that can only succeed in conjunction with strong allies who are prepared to depart from conventional ways of thinking. We would like to thank Procter & Gamble and Germany's leading online marketers for their conceptual involvement and support. Special thanks are also due to SKY, who gave us crucial access to TV data. Only by fusing data could we achieve a high level of methodical reliability and valid results.

Martina Vollbehr | Managing Director
pilot Hamburg GmbH & Co. KG



Welcome to ONLINE VISIONS 2012

At P&G, digital advertising is a major component of our communication as a whole – no matter which brands we are talking about. In every area we can see that consumers are very active digitally. That is why we at P&G talk less about digital marketing and more about marketing within a digital world.

Against this background, we collaborated with the agency pilot and some of Germany's leading media representatives to launch a series of surveys two years ago called ONLINE VISIONS. These surveys involve our brands, or – more properly speaking – how our brands are communicated.

One of the intriguing themes of the first ONLINE VISIONS survey was the relative weighting of TV and online within the media mix. Its findings were fed directly into the day-to-day planning of our online advertising. This time we wanted to go a step further and optimize the way our TV and online advertising work together, and not in a linear way: x TV contacts plus x online contacts.

Instead, the design of the survey would have to accommodate a granular, fine-tuned methodology. The aim was to find a multiplying approach which, as well as identifying the best media contact dose, could also answer questions about suitable formats, the most effective designs, and daytime/primetime advertising.

Pilot methodically presented a survey design which fulfilled our vision of an innovative study of the field. And, working with pilot, we found accomplices among some of Germany's leading online media operations who, despite diverging interests, were prepared to prioritize a common research aim. An illustrious group thus emerged for the study with whom we at P&G would like very much to conduct other similarly innovative surveys again in the future. We were especially glad that the broadcaster Sky shared our vision and is enriching our industry initiative from the television side of things.

Together with my colleagues at P&G – especially those whose actual campaigns were tested – I would like to thank all of our partners. We look forward to putting the results of ONLINE VISIONS 2012 to practical use.

Susanne Kunz | Director Media & Consumer Connections D. A. CH.
Procter & Gamble

WHAT IS AN **ONLINE** ADVERTISING **CONTACT** **WORTH?**

WHICH **ONLINE FORMATS** ARE **MOST** **SUITABLE** IN **CONJUNCTION** WITH **TV**?

HOW CAN A **CAMPAIGN** BE **OPTIMIZED** **CREATIVELY?**

HOW SHOULD **THE IDEAL** **MULTIPLYING CAMPAIGN** BE **DESIGNED?**

WHAT **DOES** THE **IDEAL ONLINE** **CREATIVE DESIGN** **LOOK LIKE?**

HOW CAN THE **EFFECTIVENESS** OF **ADVERTISING** AMONG **DIFFERENT** **TYPES** OF **TV USER** BE **BOOSTED?** **ONLINE**

WHAT IS THE **IDEAL** **INTERPLAY** BETWEEN **TV** AND **ONLINE?**

HOW **EFFECTIVE** ARE THE **VARIOUS** **ONLINE FORMATS** IN **COMPARISON** WITH **EACH OTHER?**

HOW CAN A **HOMOGENOUS CAMPAIGN** **DESIGN** BE **USED TO** **OPTIMIZE** **BUDGET** **EXPENDITURE?**

QUESTIONS

WHAT **INFLUENCE** DOES **THE TIME** OF **DAY** OF AN **ONLINE** **ADVERTISING CONTACT** **HAVE** ON ITS **EFFECTIVENESS?**

WHAT IS THE **MARGINAL** **UTILITY** OF **SINGLE**-CHANNEL **ADVERTISING?**

WHICH **MIX** OF **ONLINE FORMATS** **PRODUCES** THE **MOST** **EFFECTIVE** **ADVERTISING**?

WHICH **DAYS** OF THE **WEEK** ARE **MOST** **SUITABLE** FOR THE **ONLINE ADVERTISING** OF **FMCG** **PRODUCTS?**

METHOD PROFILE

AIM OF STUDY

To generate reliable data on the efficiency of pure TV contacts, pure online contacts and TV-online multiplying contacts.

Key facts – test campaigns

Three cross-media TV + online campaigns by P&G

- GILLETTE FUSION **Target group:** Men, 20–49 years
- BLEND-A-MED **Target group:** Women, 25–49 years
- MEISTER PROPER **Target group:** Women, 25–49 years

Campaign period: Feb 1 – March 15, 2012

Key facts – data collection

- Establish a dedicated online panel for the project
- A total of around 5,900 respondents across all collection phases
- Technical tracking of complete online behavior, and monitoring as well as targeted modulation of online campaign contacts via a browser add-on (execution: nurago GfK)
- Determine TV contacts by fusing data from the online panel with original AGF TV panel data (fusion execution: GfK)
- Conventional pre/post measuring method
- Measurement of central KPIs
- Brand and Advertising Awareness
- Brand and Advertising Image
- Persuasion (Relevant Set + First Choice)

Key facts – campaign control

Targeted modulation of online campaigns using the following variables:

- Contact frequency
- Online formats

Key facts – tested online formats

- STANDARD SIZE Superbanner/Medium Rectangle/Wide Skyscraper
- BIG SIZE Homepage Event/Maxi Ad/Half Page Ad/Hockeystick
- VIDEO Pre-Roll Ad in Video Player

For a detailed description of the method, continue on page 7
To go straight to results, continue on page 18

SET UP

The aim of ONLINE VISIONS 2012 was to produce meaningful data about the efficiency and advertising effect of pure TV contacts, pure online contacts, and TV-online multiplying contacts.

This intention required a study approach which could measure the probability of advertising contacts in each media in a way which would be valid and free of conditioning. It was also important to record cross-media contact opportunities on an individual level.

For this reason, two main methods were used for ONLINE VISIONS 2012:

- RECORDING ONLINE USAGE USING A BROWSER ADD-ON
- FUSING ONLINE USAGE DATA AND TV USAGE DATA

The basis for the fusion was provided by surveyed and measured data derived from an online panel (from NURAGO) as well as original AGF TV usage data. Data fusion was done in collaboration with experts at GfK.

Stimulus Material

ONLINE VISIONS 2012 was based on three actual TV/online campaigns for the following Procter & Gamble brands:

- GILLETTE FUSION
- BLEND-A-MED
- MEISTER PROPER

Each of these three brands has been on the market for a long time and occupies a strong position in its particular product category. The campaigns were national, across Germany, and were monitored over a period of six weeks from launch. The target groups and initial situations of each brand were different.

GILLETTE



TV/Pre-Roll Ad



Online (Standard Size/Big Size)



Target group: Men, 20–49 years
Initial situation: Continuous TV/online presence
 High level of content convergence between TV and online (the same key visual / identical copy).

BLEND-A-MED



TV Spot 1/Pre-Roll Ad 1



TV Spot 2/Pre-Roll Ad 2



Online (Standard Size/Big Size)

Target group: Women, 25–49 years
Initial situation: Continuous TV/online presence
 Similar copy (benefits), but different visuals: in other words the story differed in some respects between the video and Standard/BigSize online advertising formats.

MEISTER PROPER



TV Spot/Pre-Roll Ad



Online (Standard Size/Big Size)



Target group: Women, 25–49 years
Initial situation: Launch on TV/online;
 Active online advertising for the first time. The link between TV and online is the “Meister Proper” (Mr. Clean) key visual with a comparable benefit (new Febreze scent); the Standard/Big Size online advertising formats used a shortened story.

Before campaign launch	
Recruiting	<ul style="list-style-type: none"> - Study conducted using an online panel - Recruit survey participants for the two-month test period
Screening	<ul style="list-style-type: none"> - Pre-questioning of sample which would later be questioned in the main measurement phase - Record TV usage behavior in order to depict the anchor variables for data fusion - Establish TV viewer types - Ex ante classification of respondents into (potential) TV contact categories for the various campaigns in order to adjust the campaign simulation
Baseline measurement	<ul style="list-style-type: none"> - Determine the status quo using another independent sample
During campaign period	
Technical Tracking	<ul style="list-style-type: none"> - Record all private and some professional online usage using add-on - Targeted generation/suppression of advertising contacts in order to modulate the test cells in terms of contact figures/frequency and in terms of online advertising formats
After campaign	
Post-measurement	<ul style="list-style-type: none"> - Control measurement to evaluate the effectiveness of advertising

Survey content

Pre-questioning screener

- Socio-demographics
- Product category use
- TV usage
- Online usage
- Leisure behavior

Baseline and main measurement

- Awareness
 - Unaided Brand Awareness
 - Aided Brand Awareness
 - Unaided Ad Awareness
 - Aided Ad Awareness
- Recognition
- Brand Image
- Campaign assessment
- Advertising Image
- Relevant Set/First Choice
- Pay-TV usage

Calendar



Screening/panel construction:	January 2012
Baseline measurement:	January 23 – 27, 2012
Campaign duration, technical tracking:	Feb 1 – March 15, 2012
Post-measurement:	March 16 – 23, 2012
Data processing:	April 2012
Data fusion:	April/May 2012

Test group set-up

CELL PLAN / NET NUMBER OF CASES

ONLINE CONTACT CATEGORIES

	0	1-3	4-6	7+
0	372	317	251	354
1-2	367	348	223	370
3-5	273	258	184	293
6+	255	265	199	355

Once the different format groups and contact categories had been defined, they were combined with one another. These linkages were important in order to ensure that different clusters of characteristics comprising online advertising formats and contact categories could be formed and compared for later evaluation. The result was a complex cell plan which was then monitored throughout the campaign period so that the advertising contacts could be readjusted at any time.

The different TV and online contact categories and the "online formats" and "age group" characteristics were combined with each other to ensure that the test respondents were distributed evenly within all of the groups.

ONLINE CONTACT CATEGORIES

	1-3	4-6	7+
Standard	419	282	340
Big Size	400	221	388
Video	255	121	192
Mix	114	233	452

ONLINE CONTACT CATEGORIES

	0	1-3	4-6	7+
20-29 years	289	244	192	335
30-39 years	546	518	373	583
40-49 years	432	426	292	454

NUMBER OF CASES PER BRAND:

Gillette n = 1.711

blend-a-med n = 1.750

Meister Proper n = 1.223

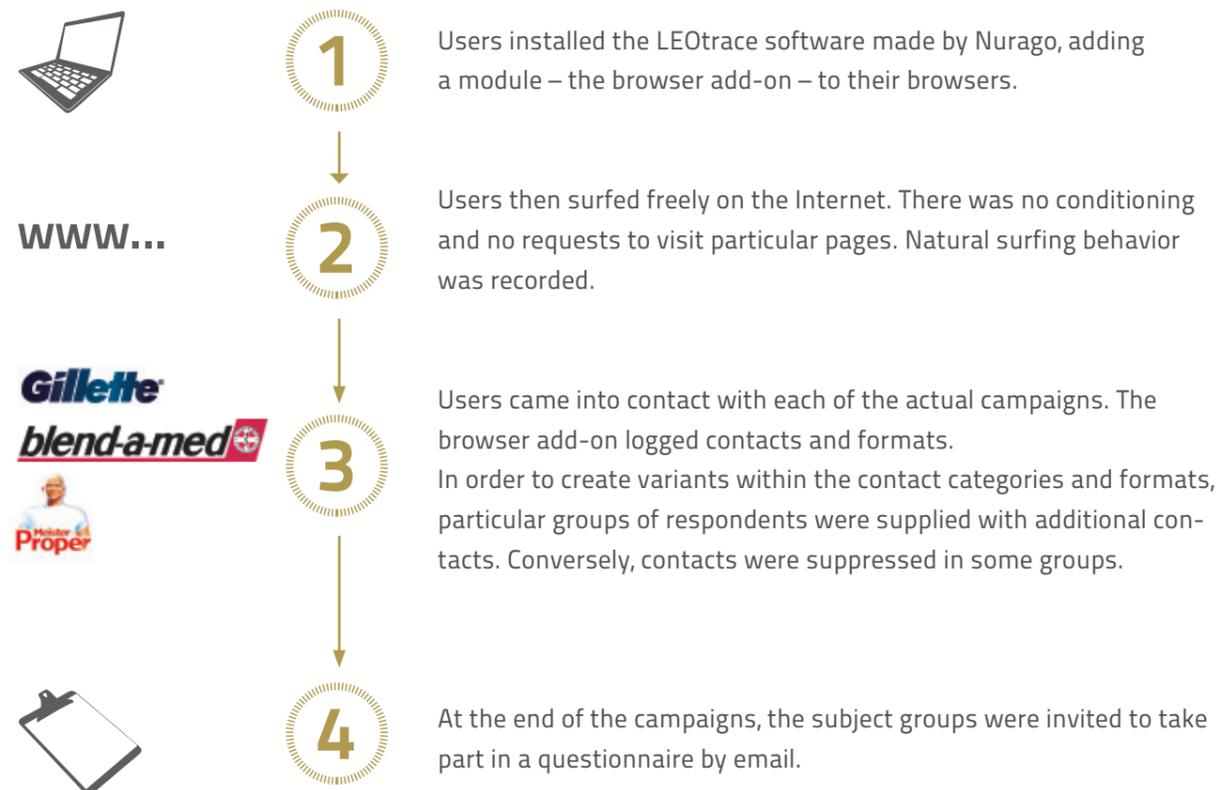
Use of browser add-on technology

The following two parameters were used as key control variables in ONLINE VISIONS 2012 in order to determine advertising effects:

- CONTACT CATEGORIES
- ONLINE FORMATS

Browser add-on technology was used to monitor these two indicators. This functioned as follows:

BROWSER ADD-ON TECHNOLOGY



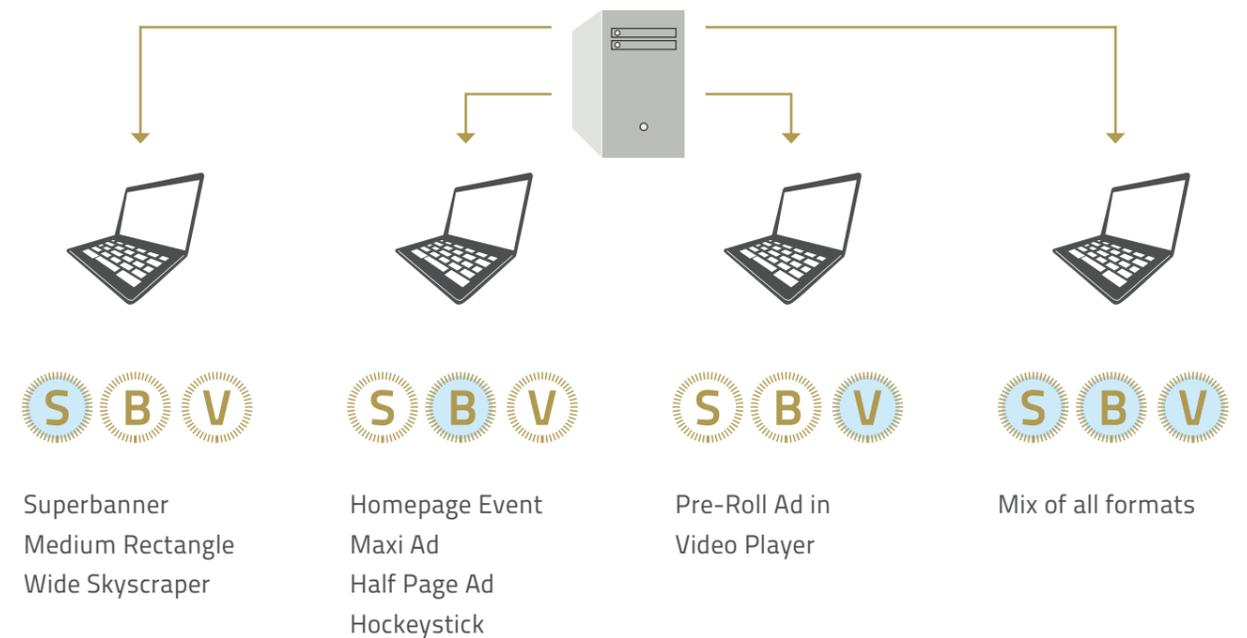
Differentiation by online format

In order to measure the influence of different online formats on advertising effectiveness, the following online advertising formats were supplied, each to one subject group:

- STANDARD SIZE (S)
- BIG SIZE (B)
- VIDEO (V)

A mixed group of respondents was also formed and supplied with all of the various advertising formats.

ONLINE FORMAT GROUPS



SECOND COMPUTER/@WORK USAGE

So as to gain as complete a picture as possible of the online campaigns, the respondents were asked to install Nurago's LEOtrace software for the browser add-on in their second computers at home.

Where primary or secondary computers were used in a work setting, there was a certain gap in measurements, since few people are allowed to install unknown software at work. Nevertheless, around 15% of professionals accepted a cookie which allowed us to track campaign contacts. Simulation did not take place in those cases.

DATA FUSION

Method

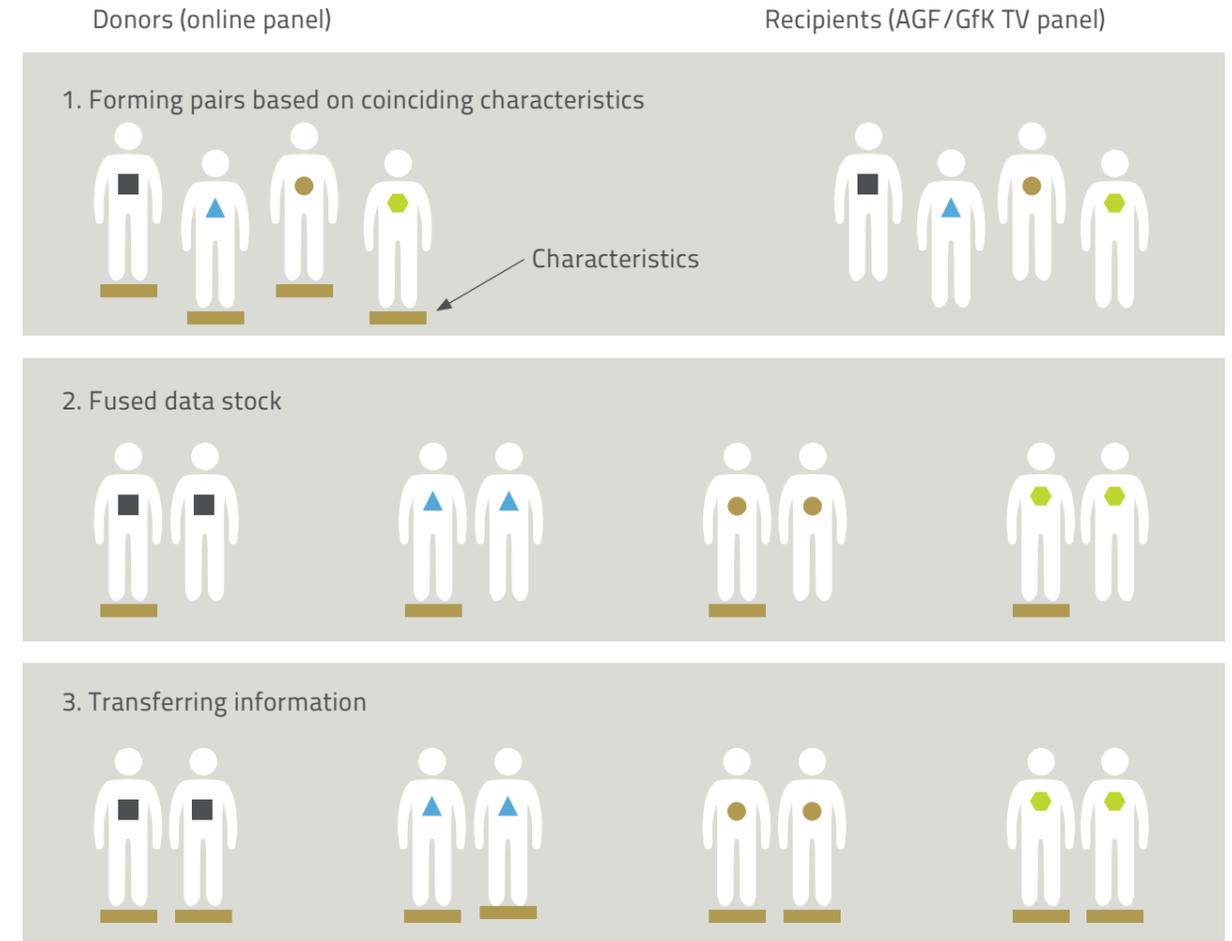
- Contacts to TV advertising derived from the AGF/GfK TV panel were to be evaluated together with information from ONLINE VISIONS 2012. For this reason, both data sources were fused using the GfK DataIntegrator. The combined data set contains joint observations applying to contacts with the TV campaign, contacts with online advertising, and parameters of advertising effectiveness. It served as a foundation for subsequent evaluations and represented a direct link to the advertising effectiveness parameters for each of the campaigns.
- The donor data set is ONLINE VISIONS 2012, the recipient data set is the AGF/GfK TV panel. Data was transferred on the basis of characteristics that were recorded in the AGF/GfK TV panel as well as in ONLINE VISIONS 2012 (shared characteristics). A total of 110 shared characteristics were used from the fields of socio-demographics, TV genres, Internet usage, TV usage, and leisure behavior. Advertising effectiveness parameters and advertising contacts were transferred for each campaign.
- For each person in the AGF/GfK TV panel, a "statistical twin" was sought, meaning the person in ONLINE VISIONS 2012 who was most similar in terms of the shared characteristics. Similarity was measured using a variation of predictive mean matching. Subsequently, online contacts and effectiveness parameters were transferred into the AGF/GfK TV panel for each of the three campaigns.
- The result of this was a data set containing all of the shared and transferred characteristics that unite the AGF/GfK TV panel and ONLINE VISIONS 2012. This data set makes it possible to evaluate TV and online advertising contacts together.



"Universal surveys involving market-leading brands are the right way to substantiate the ongoing online advertising boom and obtain clear indications about the continued development and communicative benefits of online advertising. ONLINE VISIONS 2012 has provided new, fundamental findings relating to one of the most important issues – the interplay between TV and online. It is particularly important in this field to help advertising clients to re-appraise the things they have grown accustomed to believing in in the context of the new, digital reality, so that they can make opportune media decisions."

Matthias Ehrlich | Managing Board
United Internet Media AG

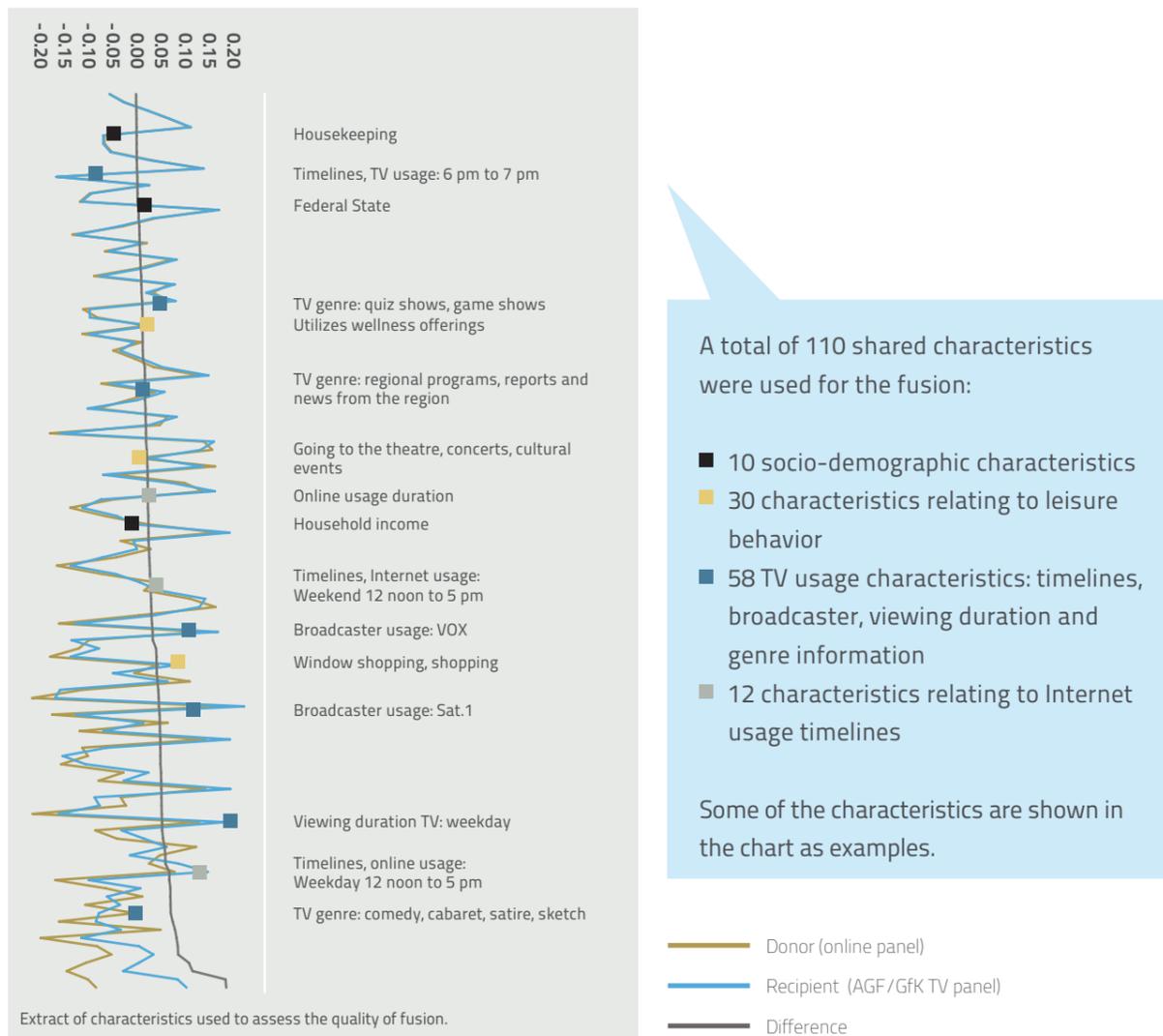
Procedure



Evaluation

- The foremost criterion of quality is the extent to which links between shared characteristics and transferred characteristics coming from the donor data set into the recipient data set are preserved. For example, if the brand likability characteristic associated with Blend-a-med correlates positively with TV viewing duration on weekdays, then it should also correlate positively with the same characteristic in the target data set. This was checked for all of the transferred characteristics and all of the campaigns using the following chart:

SPECIFIC VARIABLE: BRAND LIKABILITY FOR BLEND-A-MED (EXAMPLE OF A CHART FOR ONE CHARACTERISTIC)



- Another criterion of quality is the extent to which distributions and structures are preserved in the target data set. To this end, for instance, the averages of the transferred variables were compared in terms of television usage intensity – in other words, whether the mean assisted advertising recall was dependent on viewing duration. The structures found in ONLINE VISIONS 2012 were reproduced on the TV panel

Advertising effectiveness parameters

- No serious study would publicize the actual data associated with one of the companies involved. That is why this type of publication is based on an agreement to work with index figures.
- These index figures are also necessary to achieve comparability and generalization. This is because there are differences of level between the P&G brands involved, as a result of different starting situations and market scenarios.
- Numerous individual parameters were recorded during the project. In order to reduce complexity, these parameters were gathered together into key advertising performance indicators and calculated in terms of the following scores:
- Awareness: Average of Unaided Brand Awareness, Aided Brand Awareness, Unaided Ad Awareness and Aided Ad Awareness.
- Brand Image: Average of all image items asked about. Within the Brand Images, specific image items were collected into specific brand benefits as well. These were image items relating directly to the campaign rather than describing the generic image.
- Persuasion: Average of Relevant Set and First Choice.
- Overall-Score: Average of Awareness, Brand Image and Persuasion scores (balancing of sub-scores).



RESULTS
POWER OF MULTIPLYING EFFECTS DEPENDS ON THE BRAND STATUS.
 A **FORMAT MIX** **PERFORMS** WELL IF CREATIVE DESIGN IS ADAPTED PROPERLY.
ADVERTISING BY TIME OF DAY **OPTIMIZES** ITS **EFFECT.**
ONLINE SOLVES THE CHALLENGE OF **SELECTIVE TV** VIEWERS.
CREATIVE DESIGN REMAINS THE **KEY** TO SUCCESS.
PRIMETIME **ONLINE** CONTACTS ARE **HIGHLY EFFECTIVE** WHEN **BUILDING UP** AWARENESS.
STANDARD ADVERTISING THAT **PERFORMS** EXCELLENTLY.
COMBINING TV AND **ONLINE** DEEPENS THE MESSAGE.
MIXING TV AND ONLINE BOOSTS THE EFFICIENCY OF YOUR **CAMPAIGN.**
ONLINE DAYTIME CONTACTS ARE A **STRONG** INCENTIVE TO **BUY.**
MULTIPLYING IS EFFICIENT.
THE MORE EFFECTIVE IT IS.
THE CLOSER THE **FMCG** **ONLINE** ADVERTISING IS TO THE **TIME OF PURCHASE,** **PERFORMANCE.**
A HOLISTIC CAMPAIGN DESIGN BOOSTS **PERFORMANCE.**



COMBINING TV AND ONLINE INCREASES THE EFFECTIVENESS AND EFFICIENCY OF YOUR CAMPAIGN



	Contact dose 2 + contacts		
Awareness	108	125	121
Brand Image	117	124	130
Persuasion	115	127	135

Score: Average of all test campaigns
 Index: No campaign contact TV/online = 100, TV + online mix: multiplying contacts TV and online (2 + contacts)

Even mono online contacts increase the effectiveness of every all branding parameter significantly. Multiplying contacts add a further dynamism to campaigns, achieving at least the same effect as mono-media advertising, and sometimes much more.

Multiplying demonstrates the excellent interplay between TV and online. As already demonstrated in ONLINE VISIONS 2010, TV builds up Awareness.

Online adds to that, supplementing the important aspects of Branding and Persuasion to create a high overall effect in the campaign.

MULTIPLYING IS EFFICIENT



	Online mono	TV mono	Multiplying
Contacts	4-8	4-8	Online: 1-3 TV: 3-5
Awareness	113	125	124
Brand Image	100	124	127
Persuasion	111	132	133

Score: Average per KPI across all test campaigns
 Index: No campaign contact TV/online = 100, TV + online mix: multiplying contacts TV and online

Comparing identical contact quantities shows:

Even within the optimization corridor of 4 to 8 contacts which is conventional planning procedure, multiplying achieves a result equivalent to TV mono. At this stage it already looks like Brand Image can be efficiently supported using the multiplying effect.

THE STRENGTH OF THE MULTIPLYING EFFECT DEPENDS ON THE BRAND



	Online mono	TV mono	Multiplying
Gillette			
Awareness	103	109	106
Brand Image	110	110	113
Persuasion	109	101	110
blend-a-med			
Awareness	112	140	136
Brand Image	138	140	147
Persuasion	146	179	180
Meister Proper			
Awareness	109	126	120
Brand Image	102	122	129
Persuasion	91	101	114

Index: No campaign contact TV/online = 100, TV + online mix: multiplying contacts TV and online (2 + contacts)

These results reflect the particular starting situations of the various brands.

In the case of strong, established brands with little competition and a steady advertising presence (Gillette), mono online contacts achieve similar results to TV mono and multiplying.

blend-a-med, however, is another matter. The market is highly competitive and the brand is advertising using numerous product-related benefits. Because of this complex scenario, the campaign requires both TV and online contacts in order to work effectively.

Meister Proper also went into its campaign with high expectations on account of its new product message (Febreze). On top of that, the brand had not been active online in a relevant way before. It was shown that TV-online multiplying achieves an excellent effect on the dimensions of Brand Image and Persuasion. Only multiplying can achieve an optimum advertising effect.



“Consumers are using a broader and broader range of media, which means we need comprehensive knowledge about what the different media channels contribute to the mix if we are to make the best possible use of our budgets. As one of the leading digital marketers, we are especially keen to promote the power of the online medium as an advertising channel and component in the media mix together with our partners in the market. ONLINE VISIONS 2012 once again devotes itself to key issues in this respect, and provides new and revealing findings about the performance of online contacts in comparison with TV contacts. One of the things it proves is that, given the right pressure and format mix, online is already on a level with TV when it comes to Awareness. The results of this study will help us to make even more out of the potential of online advertising from now on, and to promote a differentiated deployment of online advertising in the media mix.”

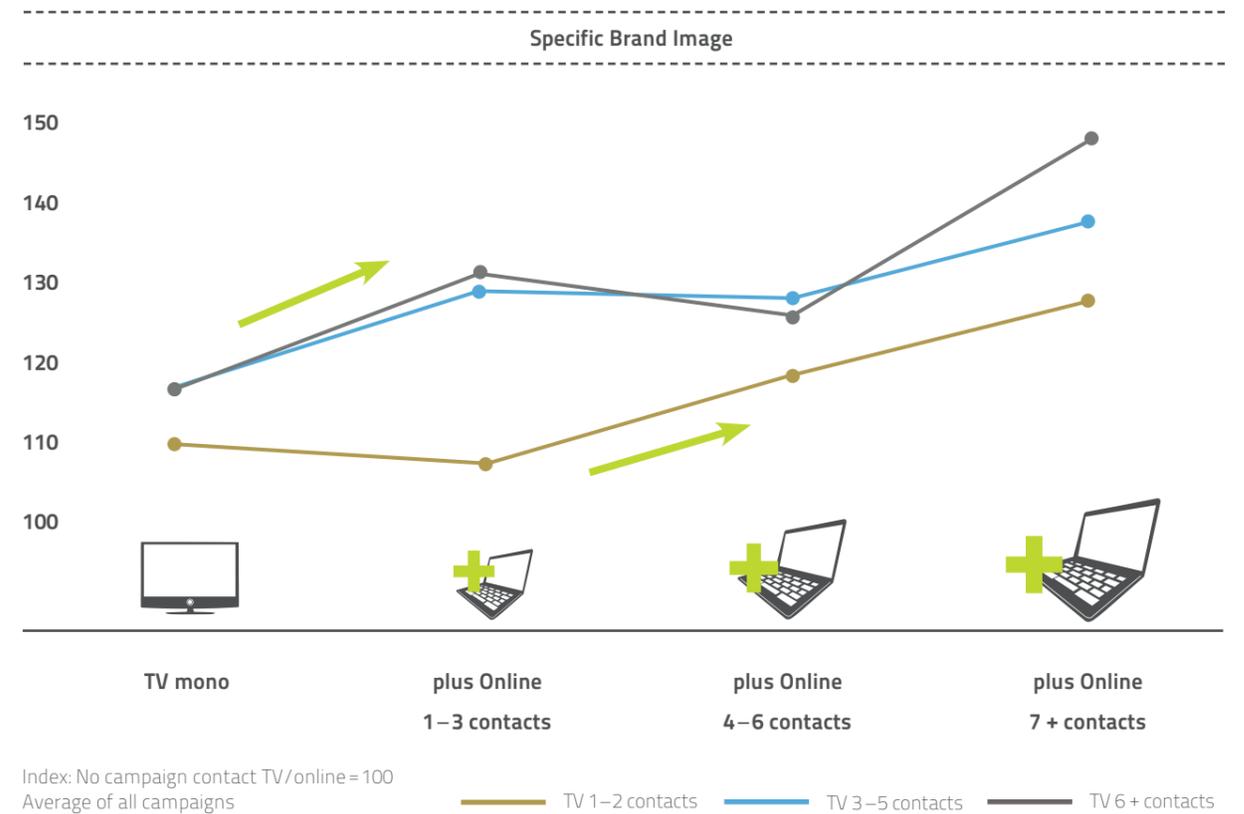
Oliver von Wersch | Managing Director
G+J Electronic Media Sales (G+J EMS)

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

The results of the study show clearly that multiplying is more powerful than mono-channel advertising in every dimension. So assuming online contacts can be purchased at a similar price to TV contacts, then there is a gain of efficiency for your campaign. We will show further on that this can include the use of Standard and Big Size formats, since the test campaigns utilize a conventional mix of inexpensive standard and expensive special format advertising.

2

COMBINING ONLINE WITH TV PROMOTES THE UNIQUENESS OF YOUR BRAND



The Specific Brand Image gathers together those items that provide special information about the benefits which are closely linked to the product being advertised. These play an especially important part when it comes to FMCGs in competitive markets in which target groups tend to have little involvement. For this reason, ONLINE VISIONS 2012 evaluated the Specific Brand Image separately. The results show that the addition of even a few online contacts can boost the effectiveness of a campaign significantly. This presupposes that the TV campaign involves at least a medium contact dose. In the case of small TV campaigns, however, a higher online dose is required.

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

It is above all the Specific Brand Image dimensions that differentiate your brand from its competitors. That is why they play an especially important role in categories involving strong competition and a wide range of products.

The study shows that among people exposed to a low TV contact dose in particular, a medium to strong use of online advertising can act as a catalyzer for your Brand Image. High-pressure TV campaigns, on the other hand, require only a low online augmentation to achieve a strong effect in the campaign.

3

ONLINE SOLVES THE PROBLEM OF SELECTIVE TV VIEWERS

THERE ARE TWO CONTRADICTIONARY KEY HYPOTHESES WHEN IT COMES TO ADVERTISING EFFECTIVELY AMONG FREQUENT AND SELECTIVE TELEVISION VIEWERS:

1. Advertising can work in relatively low doses on selective viewers, because they are exposed to much less advertising pressure than frequent viewers. If this is true, then you do not necessarily need another medium such as online in order to counter potential deficits in effectiveness.
2. Because of the contact deficit, advertising achieves a lesser effect among selective TV viewers than it does with frequent viewers. This deficit of effect can be compensated using online advertising, since selective viewers are easy to reach online and can be targeted accurately (Double Play TV/online).

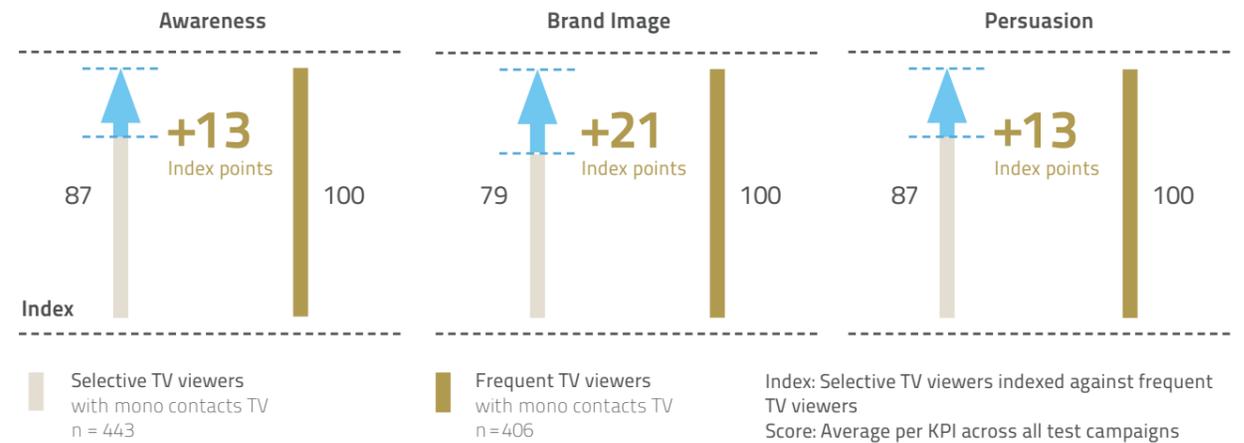
METHOD

Participants in the study were screened in advance by GfK into selective, medium and frequent viewers – using the TV usage characteristics which were also employed for the AGF panel. Categorization was done according to average daily viewing duration.



INFO: TV OTS by TV user type (across all campaigns)

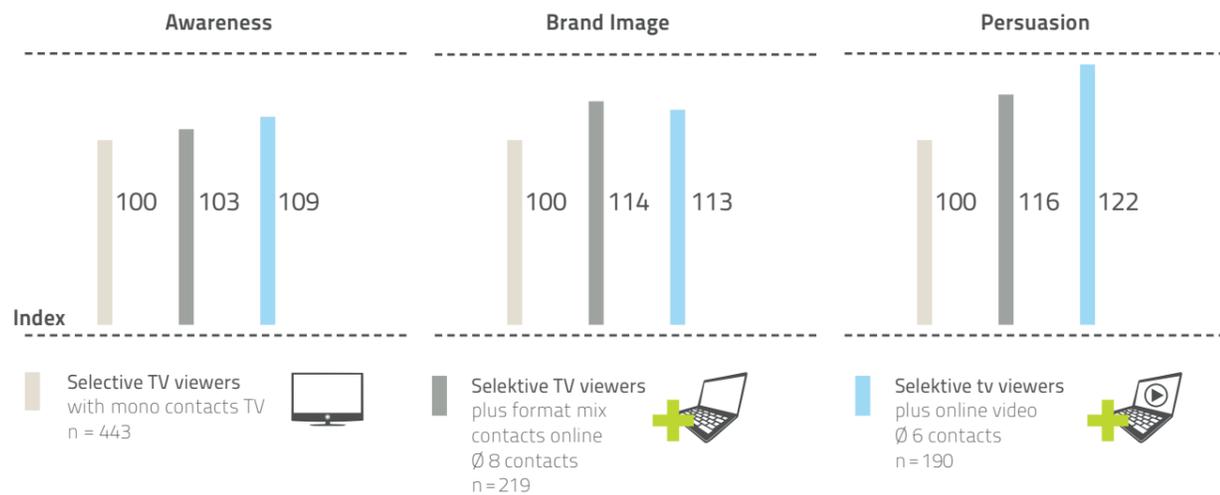
Selective viewers: 2.7
 Frequent viewers: 5.4



The results of ONLINE VISIONS 2012 show that the second thesis is correct. The effect of advertising among selective viewers is considerably less than among frequent viewers – almost 20% less on average. The challenge to be surmounted by TV-online multiplying is to bring selective viewers up to a level with frequent TV viewers.

The logical online supplement to be used for selective viewer target groups who receive only a low dose of TV contacts is to use online video (audiovisual overall approach). This approach is confirmed by the results. A multiplying campaign is especially successful in terms of Brand Image and Persuasion if online video is used.

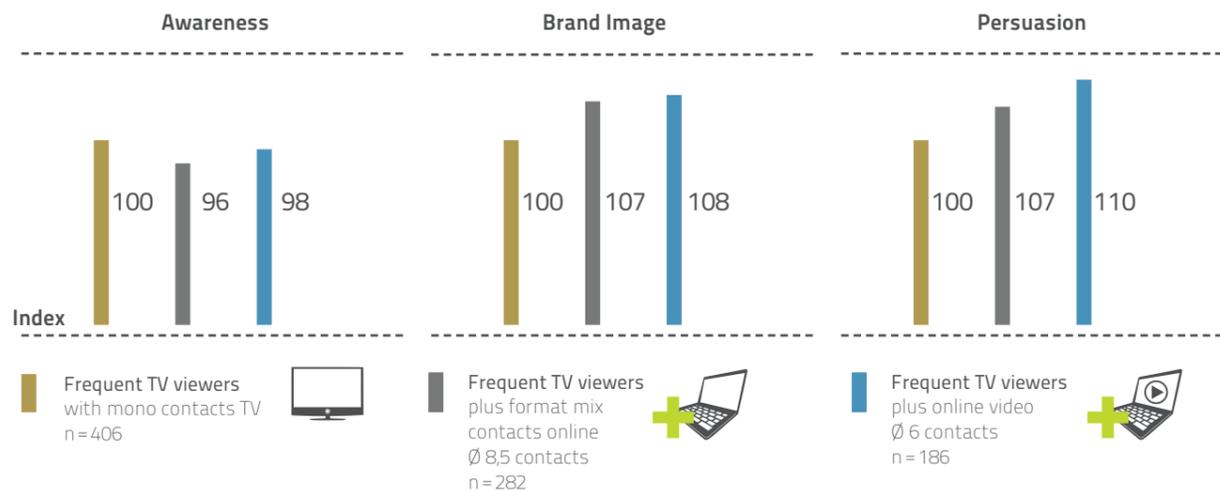
But a mix of different online formats, including standard advertising tools, also achieved significant increases in efficiency in terms of these KPIs.



Score: Average per KPI across all test campaigns
Index: Selective TV viewers mono TV contacts = 100

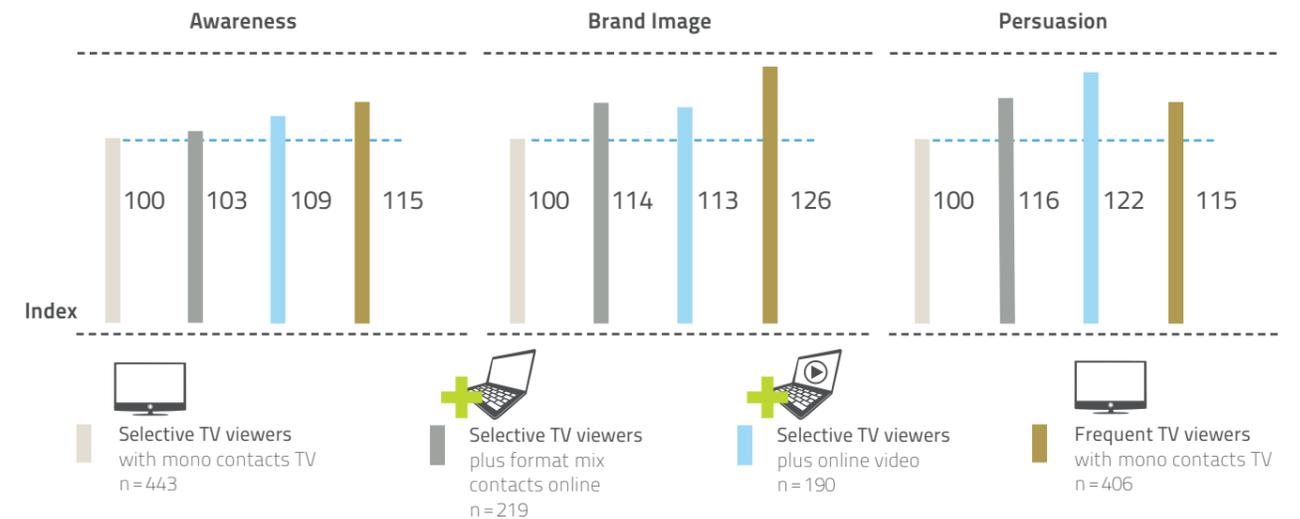
Even among frequent TV viewers, where the initial level of effectiveness is already high, online achieves additional effects on the dimensions of Brand Image and Persuasion.

Unlike with selective TV viewers, an online format mix comprising Standard, Big Size and video can achieve this uplift.



Score: Average per KPI across all test campaigns
Index: Selective TV viewers mono TV contacts = 100

The use of an online format mix can virtually close the effectiveness-deficit among selective viewers. This deficit is made even smaller by using video – which speaks clearly in favor of a double-play approach. This is where it is up to creative designers to produce unique, high-profile advertising which closes the gap completely, or even achieves additional effectiveness.



Score: Average per KPI across all test campaigns
Index: Selective TV viewers mono TV contacts = 100

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

A precise analysis of target groups in terms of selective TV viewers and frequent TV viewers reveals the potential for improving mono-channel advertising. Using online video among selective TV viewers can achieve significantly greater effects. For frequent TV viewers, a conventional mix of Standard, BigSize and video formats already achieves more effect. The basic condition for this is that TV and online advertising must be designed to correspond with each other.



Marianne Stroehmann | Managing Director
InteractiveMedia CCSP GmbH

“The outstanding effect which online advertising has on branding enables advertisers to position their brands perfectly in the market, given the right media mix. This is demonstrated by the ONLINE VISIONS 2012 market initiative, which examines very thoroughly those branding effectiveness mechanisms which operate behind the interplay between online and TV. It should be pointed out that the results were tested against the background of their efficiency – meaning, advertising pressure in comparison with branding effect. To us, ONLINE VISIONS 2012 is another milestone among genre studies whose results provide answers to the question of how budgets should be shifted towards online advertising in order to achieve more efficiency in the media mix.”

4

STANDARD ONLINE ADVERTISING CAN BE ENORMOUSLY POWERFUL IN CONJUNCTION WITH TV

	Standard	Big Size	Video
Awareness	106	107	113
Brand Image	122	122	131
Persuasion	142	130	137

Score: Average per KPI across all test campaigns
 Index: No campaign contact TV/online = 100,
 Joint basis: TV 1 + contacts

This part of the results is almost as expected: video in conjunction with TV is the most effective advertising format and achieves the highest figures in terms of Awareness and Brand Image. However, testing the effectiveness under biotic conditions shows that video is not quite as superior to other formats as one might think.

The Standard and Big Size online advertising formats also do a very good job and their performance qualifies them for the media plan.

Standard banners, which are often written off, produced a pleasant little surprise with their effectiveness, especially in the Persuasion area.



“ONLINE VISIONS 2010 has already demonstrated that online advertising can achieve significant additional branding effects when added to TV and is therefore an important part of the media mix. ONLINE VISIONS 2012 builds on these results, going further into detail. The new study investigates cross-media reciprocity between TV and online relating to different formats and advertising contacts. An important aspect of the first study was that online produced the best effect with a budget share of 15 percent and above in the brands tested. The new study design now enables us to individualize our strategic planning and tailor it to different format and content categories, which in turn allows us to differentiate further the 15 percent general figure provided in 2010, depending on our campaign objectives. This gives media decision-makers an important foundation for their budget planning.”

Markus Frank | Director Advertising & Online
 Member of Management, Microsoft GmbH

5

A HOLISTIC TV ONLINE CAMPAIGN DESIGN SIGNIFICANTLY BOOSTS PERFORMANCE

GILLETTE

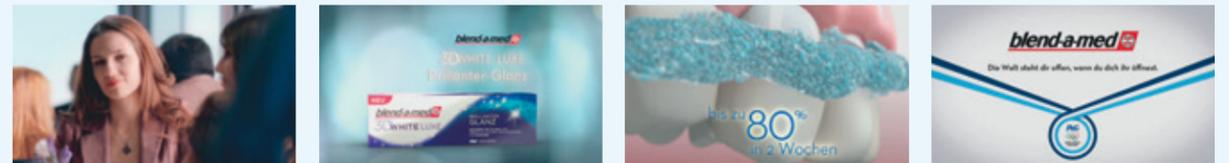


TV/Pre-Roll Ad



Standard/Big Size

BLEND-A-MED



TV/Pre-Roll Ad



Standard/Big Size

MEISTER PROPER

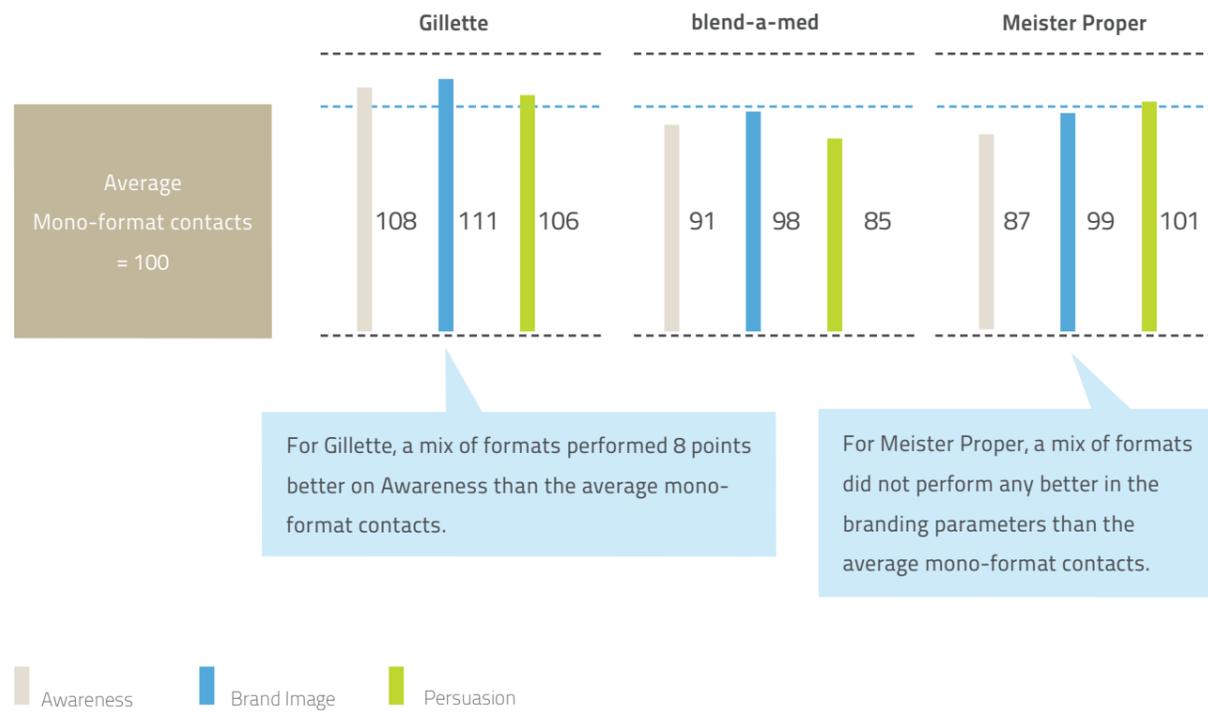


TV/Pre-Roll Ad



Standard/Big Size

THE MORE THE ADVERTISING TOOLS ARE SYNCHRONIZED IN CONTENT, THE BETTER A MIX OF FORMATS PERFORMS



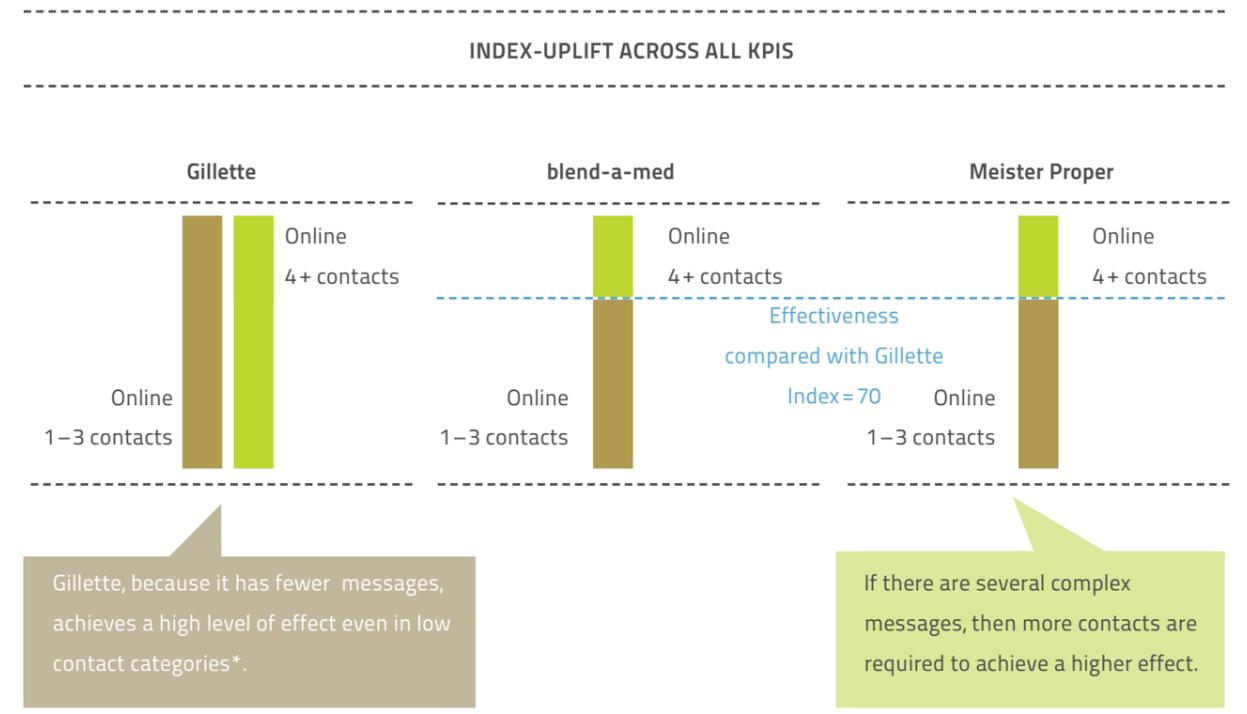
For Gillette, a mix of formats performed 8 points better on Awareness than the average mono-format contacts.

For Meister Proper, a mix of formats did not perform any better in the branding parameters than the average mono-format contacts.

Score: Average per KPI across all test campaigns
 Index: Average of formats Standard, BigSize and video = 100/online 1+ contacts/TV 1+ contacts

With Gillette, which has a small number of advertising messages and advertising materials which are tuned to one another, a mix of formats achieved better results than the mono-format group. The Meister Proper and blend-a-med campaigns are characterized by more complex messages. These different signals did not produce the ideal learning effect in a mix of formats, and therefore did not make for better advertising.

MORE COMPLEX MESSAGES REQUIRE HIGHER CONTACT DOSES



Gillette, because it has fewer messages, achieves a high level of effect even in low contact categories*.

If there are several complex messages, then more contacts are required to achieve a higher effect.

* Identical level with 1 - 3 online contacts and 4 + contacts
 Index: Average from contact in just one format (Standard/Big Size/video) = 100

The blend-a-med and Meister Proper brands communicate numerous different messages. This leads to more complex perception patterns, which slow down recognition and learning processes among users. In such cases, low online contact doses do not produce optimum results. Every time a user comes into contact, part of the advertising message has to be relearned. Messages do not become firmly implanted until online contact doses rise. A brand like Gillette is different: it has few messages and just a few online contacts are sufficient to achieve maximum effect.



“Investing in high-quality advertising materials definitely pays off – especially when combining online and TV. That is why at Procter & Gamble we always qualify our advertising beforehand when launching large-scale online branding campaigns. Quality pays off and is immediately noticeable in the performance of a campaign.”

Bridge Einicke | Head of Media & Digital Operations
Procter & Gamble

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

Various studies in recent years have concluded that, basically, only the most exclusive and therefore most expensive online advertising (especially video) is able to meaningfully supplement branding campaigns – and this has often led to the conclusion that online cannot achieve relevant efficiency benefits.

This verdict can now be refuted. In conjunction with TV, standard advertising tools which have often been doubted can make an excellent impact. For campaign planning this means you can save a lot of money while still achieving high online coverage and contact doses, by adding standard advertising tools to your online campaign.

This however depends on a well-coordinated design of the TV and online campaigns. There is another factor in this context which, although it is often neglected in campaign planning, is in fact hardly surprising: the more complex the advertising messages, the higher the level of advertising pressure has to be. This study confirms that this applies also to combined TV/online campaigns.

CREATIVE DESIGN REMAINS THE KEY TO SUCCESS

The interplay between TV and online in terms of content and visuals is a decisive factor in the success of a campaign. ONLINE VISIONS 2012 did not focus on the creative potential of the campaigns it examined, but it was clear in many places that the success of a campaign depends not only upon finding the ideal contact category or the right online advertising format. Campaigns cannot develop their full potential unless there is a well balanced creative interplay between TV and online, in addition to the right media tactics.

That is why we would like to reiterate at this stage the “Six Commandments” of successful campaign design, as stated in ONLINE VISIONS 2010:

- 1 **Strong branding:** the brand (logo/hero/symbol) must be clearly visible from start to finish.
- 2 **Achieve recognition:** elements of the TV and overall campaign must reappear in online advertising designs – the look and feel should be casted from the same mold.
- 3 **Make clear statements:** that means, emphasize the product benefits clearly, waste no time, focus on very few statements – don’t put too many pots of the stove.
- 4 **Adapt campaigns appropriately for each medium:** and/or present the content in a way that suits the medium. Users are impatient – storylines are better than storytelling.
- 5 **Online video:** a video should work without sound.
- 6 **Speak directly to users:** ideally, include interaction options and an explicit call to action.

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

There are two creative factors that have to be taken into account to achieve the optimum campaign effect. First of all, online campaigns have to follow the rules of Internet communication and take into account the situations in which users surf the Net. Secondly, do not underestimate the importance of closely designed TV and online advertising materials.

Given the considerable amounts of money which are now being invested in online advertising, it is surprising that these fairly obvious requirements are often not met very well. There is lots of unused potential here.

6

PROVEN FOR THE FIRST TIME: CONTROLLING THE TIME OF DAY OF ONLINE ADVERTISING OPTIMIZES ITS EFFECTIVENESS

Respondents were divided into three groups for the analysis:

 PRIMARILY PRIMETIME (N = 481)	 DAYTIME ONLY (N = 1.071)	 PRIMARILY DAYTIME (N = 427)
At least 2/3 of online contacts received in primetime (7–11 pm) erhalten	Online contacts received 100% in daytime	At least 2/3 of online contacts received in daytime
OTS TV: 3.9 OTS Online: 4.0	OTS TV: 4.4 OTS Online: 4.0	OTS TV: 3.7 OTS Online: 4.5

The following major factors were monitored:

- All of the groups had contact with the TV campaign at a similar OTS level.
- All of the groups had a practically identical amount of contact with the different online formats.

The different levels of effectiveness can therefore be attributed to the time at which advertising contact was made. A group consisting of "Primetime only" contacts could not be formed because there were not enough instances.



"The ONLINE VISIONS 2012 study is a natural evolution of the first study in the year 2010. By recording use in the workplace and fusing online data in the AGF panel, this study employed an elaborate and unique methodology which produced highly relevant results that demonstrate the branding effect of digital display advertising. These neutral analyses once again prove the efficiency gained in the campaigns examined by the use of online advertising in the media mix."

Martin Lütgenau | Managing Director
TOMORROW FOCUS Media GmbH

ONLINE DAYTIME CONTACTS ARE A STRONG INCENTIVE TO BUY

	Primarily primetime 	Daytime only 	Primarily daytime 
Awareness	123	114	118
Brand Image	121	114	124
Persuasion	123	126	139

Score: Average per KPI across all test campaigns
Index: No campaign contact TV/online = 100

TIME OF DAY AND ONLINE ADVERTISING EFFECT: CONTINUATION OF ONLINE VISIONS 2010

ONLINE VISIONS 2010 had already indicated clearly that the time of an online contact influences the effect of its advertising. Users receive online advertising in a more relaxed and open mode during conventional TV primetime.

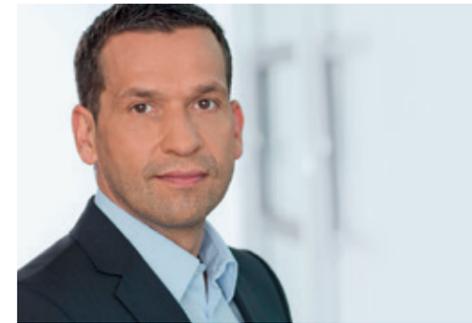
ONLINE VISIONS 2012 now demonstrates using a broader measurement basis that there are serious differences in the effectiveness of advertising depending on the time of day.

Primetime contacts have a more positive effect on Awareness than daytime contacts.

In FMCG campaigns, in which the process of preparing to buy (planning daily/weekly shopping) happens very much during the day, daytime contacts have a particularly strong effect on Persuasion. Looking at all of the KPIs, a mix of daytime and primetime contacts is clearly superior to a daytime-only plan.

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

By providing results about the different effect of advertising contacts at different times of day, ONLINE VISIONS 2012 produced a finding which has barely been considered in campaign planning to date. The results are clear: if you adjust the time of an advertising contact to your brand and target group you can achieve significant performance benefits. Fine-tune the effect of your advertising by distributing between daytime and primetime in accordance with your campaign objectives.



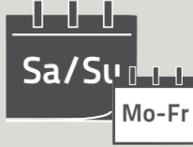
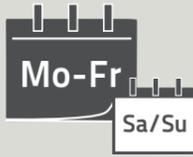
“ONLINE VISIONS 2012 shows us how essential online advertising is in today’s media mix. This study also encourages us to continue pursuing our content strategy. Our blend of professional video formats and large, high-profile advertising forms like our homepage events allows us to shape our advertising around each target group depending on the campaign aim. The results of this study provide customers, agencies, and marketers with important insights about what the ideal mix is for different brands. We are pleased to have been able to contribute towards this highly relevant research project.”

Heiko Genzlinger | Managing Director & Vice President Sales, Yahoo! Deutschland

7

FMCG ONLINE ADVERTISING WORKS BETTER THE CLOSER IT IS TO SHOPPING DAY

Respondents were divided into three groups for the analysis:

	<p>PRIMARILY WEEKEND</p>	<p>At least 2/3 of online contacts received on weekend</p>	<p>OTS TV: 4.1 OTS Online: 3.0</p>
	<p>WEEKDAYS ONLY</p>	<p>100% of online contacts received on weekdays</p>	<p>OTS TV: 4.0 OTS Online: 3.5</p>
	<p>PRIMARILY WEEKDAYS</p>	<p>At least 2/3 of online contacts received on weekdays</p>	<p>OTS TV: 4.5 OTS Online: 3.8</p>

The following major factors were monitored:

- All of the groups had contact with the TV campaign at a similar OTS level.
- All of the groups had a practically identical amount of contact with the different online formats.

The different levels of effectiveness can therefore be attributed to the time at which advertising contact was made.

A group consisting of "Weekend only" contacts could not be formed because there were not enough instances.

THE NEARER FMCG ONLINE ADVERTISING IS TO SHOPPINGDAY, THE MORE EFFECTIVE IT IS

	Primarily weekend Sa/Su Mo-Fr	Werktags only Mo-Fr	Primarily weekdays Mo-Fr Sa/Su
Awareness	114	118	118
Brand Image	112	120	117
Persuasion	115	133	128

Score: Average per KPI across all test campaigns
Index: No campaign contact TV/online = 100

FMCG ADVERTISING: WEEKDAYS OR WEEKEND?

It is well known in marketing circles that weekdays are especially important for advertising FMCG products, since consumers often plan their shopping and decide about it during the week. Consumers are more open to the advertising of fast-moving goods during the week because it assists them at exactly the right point in their daily lives.

The results of ONLINE VISIONS 2012 confirm this for online advertising as well: FMCG campaign contacts that take place during the week are visibly more effective than contacts on the weekend. The differences are especially clear in the effect advertising has on Persuasion (Relevant Set and First Choice), which is essential to the decision to buy. Weekday contacts are also slightly better in their effect on Brand Image and in building up Awareness.

SUGGESTIONS FOR YOUR CAMPAIGN PLANNING

Aside from the time of day, the day of the week on which the advertising contact takes place can play a major role. This finding is new, in particular when it comes to planning online campaigns. In order to achieve a very effective campaign, it is advisable to place FMCG advertising on the Internet on those days which are most relevant to the product you are advertising.

These are the first ever reliable findings on the effects of adjusting online advertising according to the time of day and the days of the week. Further studies are however needed in order to provide brands with more certainty about this approach to planning.



“In today’s media landscape, television is ahead of every other medium in its ability to achieve wide coverage quickly. The digital age, in which the number of offerings, media channels and terminal devices rises by the year, is however changing viewing habits and making it increasingly important to network advertising activities. An ideal interplay between TV and online advertising is essential if we are to achieve the perfect advertising effect in the media mix. As an innovative marketer of sports and entertainment in Germany and Austria, it is therefore our objective to open up new and exciting areas of business in order to create for our customers and agencies the best possible solutions spanning all media, and by doing so to point the way to the most successful advertising. It is especially important to us to examine television and online advertising in particular in terms of their effectiveness and the way advertising campaigns are optimized. We are very happy to be involved for the first time as a partner in the ONLINE VISIONS 2012 study, and by doing so to get to grips with the question of how to make TV more effective by means of online advertising.”

Martin Michel | Managing Director
Sky Media Network

SUMMARY

ONLINE VISIONS 2012 proved once again that the right mix of TV and online advertising can significantly increase the efficiency of your campaigns.

Online mono advertising and TV mono advertising already achieved more effect – but a mix of TV AND ONLINE beats mono-channel advertising.

Invest in multiplying campaigns. A combination of TV and online boosts effectiveness and increases the efficiency of your campaign.

TV in conjunction with ONLINE reinforces the UNIQUENESS of your BRAND.

Specific benefits differentiate your brand from its rivals – you can achieve lasting effects by supplementing your TV plan with online activity.

Online solves the CHALLENGE of selective TV viewers.

By the careful use of online video, with minor curtailments, and with an online format mix, you can, among selective TV viewers, approach the higher effectiveness achieved among frequent TV viewers.

STANDARD ONLINE ADVERTISING MATERIALS can achieve unexpected results in conjunction WITH TV.

Aside from video, Standard and Big Size provide significant and efficient support for the overall effect of your campaign.

A HOLISTIC ONLINE-TV CAMPAIGN DESIGN increases the performance of your campaign.

Synchronized advertising messages on TV and online boost the performance of your campaign. Complex and diverse messages require more contacts.

PROVEN for the first time: controlling the TIME OF DAY of ONLINE advertising can make it more effective.

Take into account the time of day of your advertising contacts when planning. FMCG advertising contacts that take place primarily in daytime make people more WILLING TO BUY.

FMCG ONLINE ADVERTISING works better if it is nearer to SHOPPING TIME.

Differentiating by different days of the week does not play a major role in building up the Brand Image. In order to increase willingness to buy for FMCG products, it is advisable to build up online contacts on weekdays as part of your multiplying campaign.

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Nurago GmbH



Tabulation/evaluation
IfaD



Data fusion
GfK SE



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FHP-design



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