

## **FOREWORD**



The media space is rapidly evolving as people around the world spend more and more time connecting with each other, searching for information and being entertained through digital platforms. The attached "Media Golden Rules" share Unilever's latest understanding of best practices in each area of media, focusing not only on digital, but also more traditional and still highly relevant channels such as TV, radio, and out of home. It also includes the latest learnings regarding creative executions in these channels. As with the Metrics that Matter, these "Rules" are intended as an enabler to maximize our success, rather than a set of restrictions that limit our pioneering spirit.

Most importantly, despite all of the change in the media landscape on the digital front, and while the Golden "Rules" take a channel by channel perspective on best practices, it's critical that we don't lose sight of the most fundamental media principles that remain as true as ever in this digital era. As we look above the details of the channel by channel recommendations, we should all bear in mind that in the context of an annual brand marketing plan, for a given, agreed budget with the business, a continuity-based (or "always-on") communications strategy across multiple channels will always deliver the best reach, awareness, efficiency & ROI.

If you need help understanding this framework or how to apply it to your brand or campaign, please contact your Media or CMI business partner.

Here's to our continued success Unlocking the Magic of our brands through media!

### Luis Di-Como

SVP Global Media November 2013

# **Contents**

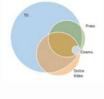


- 1. FUNDAMENTALS OF TV PLANNING
- 2. SWEATING THE ASSTS
  - A) TV AD WEAR IN AND OUT
  - B) IDENTIFYING ASSETS THAT HAVE NOT WORN OUT
- 3. TV AD LENGTH
- 4. DIGITAL IMPACT ON TV
- 5. DIGITALCAMPAIGN DEPLOYMENT
- 6. ONLINE VIDEO ADS
- 7. CONTEXT MATTERS
- 8. PRINT

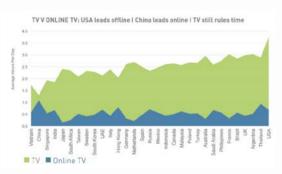
# 1. FUNDAMENTALS OF TV PLANNING



BE VIDEO NEUTRAL ACROSS CHANNELS Unilever is starting to reposition TV as video viewing, in that it occurs across screens and time periods. This has an impact on how to reach builds



3% - 8%

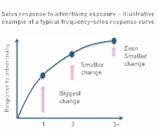


Source: 2013 Millward Brown / Firefly European Cross Media Database Source: GlobalWebIndex, Q4 2012, 31 countries

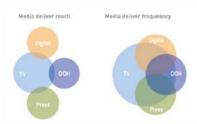
OPTIMIZE REACH VS. FREQUENCY: FOCUS ON REACH AND FREQUENCY WILL FOLLOW

Online video provides 3-8% incremental reach to TV

- The first exposure always provides the greatest uplift
- Subsequent exposures, offer lower levels of return but still return!
- Increase reach, & you automatically increase freq. among heavier TV viewers
- Use additional channels to further increase reach among lighter TV viewers



Source: PHD - major single-source studie:



Source: 2013 Millward Brown / Firefly European Cross Media Database

RECOMMENDED GRPS:
DRIVEN AT A LOCAL LEVEL
BASED ON HOW REACH
BUILDS IN THAT MARKET.
CONTACT LOCAL MEDIA
AGENCY

A separate excel spreadsheet with minimum campaign GRPs by market, launch type and target audience has been created/signed off on by Media. Available from Media and CMI

	Phase	Food & Ice Cream					
Audience		Eff Freq	Est Reach	GRPs	Eff Freq	Est Reach	GRPs
W18-49	Gold	1+	93.6	1,200	1+	94.4	1,500
	Bronze	1+	91.9	800	1+	91.9	800
	Silver	1+	92.9	1,000	1+	92.9	1,200
W25-54	Gold	1+	93.7	1,200	1+	94.4	1,500
	Bronze	- 14	92.3	800	14	92.3	880
	Silver	1+	93.2	1,000	1+	93.2	1,200
W35+	Gold	1+	95.2	1,200	1+	95.8	1,500
	Bronze	1+	93.8	800	1+	93.8	800
	Silver	1+	94.7	1,000	1+	94.7	1,200
M18-49	Gold	1+	92.2	1,200	1+	92.2	1.200
	Bronze	1+	90.2	800	1+	90,2	800
	Silver	1+	91.3	1,000	1+	91.3	1,000

Important to reach mass media target, (includes creative target), to reach a

EXPAND CREATIVE TARGET TO MEDIA TARGET TO REACH GREATER POTENTIAL BUYERS



MEDIA TARGET

**CREATIVE TARGET** 

is the group you need to reach to encourage them to buy your brand. This will be closer to the current buyer base. Start with gender and overlay age

informs channel strategy and helps

define the look and feel of creative

wide group of potential buyers

### **EXAMPLE**

Brand creative target 25-44 Women, optimistic, family focused, primary shopper with 3-8 yr old children represent 3% category purchases. Brand's current share is 26%. Planning against just creative target would limit the brand's potential

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# 1. FUNDAMENTALS OF TV PLANNING



TWO COMPLIMENTARY STRATEGIES: CONTINUITY & BURST

### **BURSTS**

Are appropriate for new product launch or drive significant awareness quickly in market



Recommended to run burst followed by Continuity

Bursts should be followed up with Continuity laydown. At launch, ensure product has sufficient distribution before going on air

BURST: Heavy weight of GRPs in short period



CONTINUITY



Should be used as the maintenance 'always on' strategy, extending campaign GRPs over the longest period. There are three different continuity plans: Pulse, Drip or Drip+Pulse

DRIP: Low weight of GRPs over long period

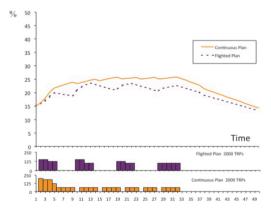
PULSE: On/off presence at moderate weight levels per week Note: The number of 'off' weeks should be determined
by analyzing the ad-stock\* for your brand/market

.....

DRIP + Low weight of GRPs over long period, with increased PULSE: GRPs every few weeks

## CONTINUOUS COMBATS AWARENESS DECLINE

- When brands are not on air they experience a slow decline in awareness
- High media weights experience diminishing returns because heavy TV viewers end up seeing the ad too often
- This makes continuous laydowns a good way of combating awareness decline



▶ BUDGET CUTS: DO NOT JUST FOCUS ON GRPS DURING BUDGET REALLOCATION. CONSIDER ELEMENTS SUCH AS STRATEGIC PRIORITY OF BRAND ASSET AVAILABILITY/TESTING, PREVIEW / POSTVIEW, SOS, SOM, ROI, MARGINS, AIM/MAC AND OTHER AVAILABLE INFORMATION.

# 2A. SWEATING THE ASSETS: TV AD WEAR IN & OUT

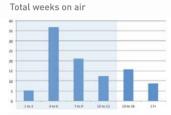


### ▶ WHAT IS WEAR IN: FOR AN AD TO BE SUFFICIENTLY EFFECTIVE, IT NEEDS TO WEAR IN I.E. BE GOOD QUALITY AS PROVEN IN PREVIEW, AIRED AT LEAST WITH MIN GRPS AND AIRED LONG ENOUGH

PreView testing indicates the ad below will **never** wear in due to low persuasion and/or awareness

Nearly 75% of European ads don't stay on air for as long as needed to see their effects wear out Almost 90% of European ads spend below or around country averages







Source: Millward Brown Preview - 60 cases from Unilever UK, Germany, France & Italy

## ▶ WHAT IS WEAR OUT: REFLECTION OF CREATIVE NO LONGER DELIVERING ON OBJECTIVES AND LOSING ABILITY TO CREATE IMPACT ON MEASURE OF INTEREST (AWARENESS, NEW NEWS, ETC)

### ▶ ADS MAY LOSE EFFECTIVENESS DUE TO EXTERNAL FACTORS



- Personality in the ad falls out of favor
- Element of the ad goes out of fashion (e.g. the music)
- The relevance of the strategy changes (e.g. due to competitor action)
- Wear out most likely when there is new news

### EXAMPLE CIF "SKATER"

- Ad was very effective at converting users from powder to cream
- Relevance of film decreased as conversion job was done

## ADS MAY LOSE EFFECTIVENESS DUE TO EXTERNAL FACTORS

IDENTIFY REQUIRED MIN GRP LEVEL FOR CAMPAIGN Min GRPs driven at local level based on how reach builds in market. Contact local Media agency

A separate excel sheet has been created with min GRPs by market, launch type and target and signed off by the media director/manager

 ${\bf Benchmark\ TV\ GRP\ Weights\ for\ Campaign}$ 

Audience	Phase	Eff Freq	Est Reach	GRPs.	Eff Freq	Est Reach	GRPs
W15-43	Gold	14	93.6	1,208	14	94.4	1,500
	Broke	1+	91.5	200	1+	91.9	800
	Sher.	3+	92.9	1,000	1+	92.9	1,200
W25-54	Gold	1+	93.7	1,200	1+	94.4	1,500
	Brosne	1+	92.3	800	1+	32.3	800
	Silver	1+	53.2	1,000	1+	93.2	1,200
W25+	Geld	1+	95.2	1,200	1+	95.0	1,500
	Extrare	1+	53.8	800	t+	93.6	800
	Silver	1+	94.7	1,000	1+	34.7	1,200
M18-49	Geld	1+	92.2	1,200	1+	92.2	1,200
	Biotze	34	50.2	800	1+	90.2	800
	Silver	1+	91.3	1.000	to.	91.3	1,000

### NO EVIDENCE OF WEAR OUT ON STRONG ADS

- 515 Unilever ads tested from around the world demonstrated no evidence of wear out on AI regardless of length on air (Millward Brown)
- There is NO evidence of a good ad (meaning in the Green areas of the 9 box CEM) wearing out prior to 12 weeks on air
- 60% of Unilever ads are not aired for 12 weeks
- Many Unilever ads are aired at low GRP weights
- Look at previously aired ads: if ads were strong performers and match current JTBDs, run again



# FOCUS ON REACH AND FREQUENCY WILL FOLLOW



### **2B. SWEATING THE ASSETS: IDENTIFYING ASSETS THAT HAVE NOT WORN OUT**



MEASURE AD WEAR OUT FOR TV ADS THAT ARE ON AIR AND OFF AIR AND CONTINUE TO RUN STRONG, RELEVANT ADS. PRODUCE FEWER ADS AND RUN THEM LONGER

### TWO (2) WAYS TO IDENTIFY ASSETS THAT CAN BE RE-RUN OR CAN CONTINUE TO RUN

1. REVIEW **PREVIOUS** AIRED ADS Review ads from the last 18 months to understand if they are worn out or have the potential to be aired again

#### **Decision Hierarchy**

Did ad effectively deliver the key message based on PostView?

Was ad effective in market based on Tracking? (Brand measures, Awareness, Image Pyramid)

> Does the ad match current JTBDs?

High quality ads that match objectives (CMI

RE-USABLE

€20.5MM **IN SAVINGS** 

in two categories using the decision hierarchy to identify 25% of ads that are reusable

REVIEW CREATIVE PERFORMANCE AND WEAR OUT TOGETHER TO MAKE RECOMMENDATION TO CONTINUE **RUNNING AN AD** 

### 2. REVIEW **IN-MARKET** ADS (BB)

Identify ads that can continue to be run by using Creative Wear Out Scorecard to determine if an ad has worn out and if it can continue to be aired or run later in the year



### After the 1st PostView:

How are my ads performing?Should they be aired more?

#### After the 2nd PostView:

Is my ad showing signs of wear out or can I continue to run?

### HOW?

Baseline ad wear out status established by reviewing PreView results and Media Plan and re-evaluated after running 1st Post View after reach 60% +GRP and sample n=100+.

Baseline ad wear out status based on these two elements









### WHEN?

Creative wear out can be measured after 2nd PostView, after 12 wks on air w/sufficient GRP weight

Numbers of weeks on air	Up to 12	12 to 20	More than 21
Number of PostViews	1	2	3 (or more)
When to field PostView 1	60%+ GRP and sample n=100+	@ week 5	@ week 5
When to field PostView 2		@ week 13	@ week 13
When to field PostView 3			@ week 25 (if ad will run for longer than 30 weeks, you may consider a 4th PostView @ week 35)

				Wear out	Creative P	erformance	1
Country	Name	GRPs	Weeks on air	Indicator	Branded Impact	Postview Metric B	What is Postview Metric B
Indonesia	Clear Kimi	7% below average	8 weeks	Vital	Red	Red	New News
ndonesia	F Dove 'Shinta'	46% below average	8 weeks	Vital	Red	Red	New News
ndonesia	Lux MJ	39% below average	5 weeks	Vital	Amber	Amber	New News
Turkey	Elidor Sevgimiz Karşılıklı	32% above average	7 weeks	Vital	Green	Green	New News
Turkey	Yumoş Ferahlığıyla Yeni Omo	6% below average	11 weeks	Vital	Amber	Green	New News
Turkey	<u> </u>						5

### ▶ PRODUCE FEWER ADS AND RUN THEM FOR LONGER

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**⊠E**≥ 100

# 3. TV AD LENGTH



# ► FIND THE RIGHT BALANCE OF EFFICIENCY AND EFFECTIVENESS

- Advertising needs to deliver the Job To Be Done regardless of ad length
- Media plans need to deliver the Job to be Done; a carefully crafted campaign can fall short of expected delivery if not executed the way it was developed



# CLEAR ROLE WHEN TO RUN 30s (LONG FILM) VERSUS 15s (SHORT FILM)

Length	Use whenever	This is normally when
Long (e.g. :30+)	More time is necessary for effective communication	New brand launches/ new line extensions / New Brand Communication Idea / Repositioning     More emotional messages     Multiple messages / Complex ladder of benefits
Short (e.g. :15)	It's possible to effectively communicate a continuation of a consistent theme	To reinforce / remind people about a brands message When the message is simple compelling idea & doesn't need explanation A cut-down of a longer ad to act as a reminder of longer ad after the longer ad has been fully established

### ▶ 15s ARE MORE EFFICIENT

• 15s continue to offer an efficiency advantage over 30s

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- Maintain guideline of starting with: 30s to drive awareness and switch to:15s for frequency
- 15s are more efficient: Campaigns with a higher ratio of 15s generate higher ROIs (US MMM)

Unilever Median TV RROI - US

35% 65% ■ 30s or Longer

Unilever US Total TV - % :15s

Campaign Observations:

Source: US MMM analysis 2012

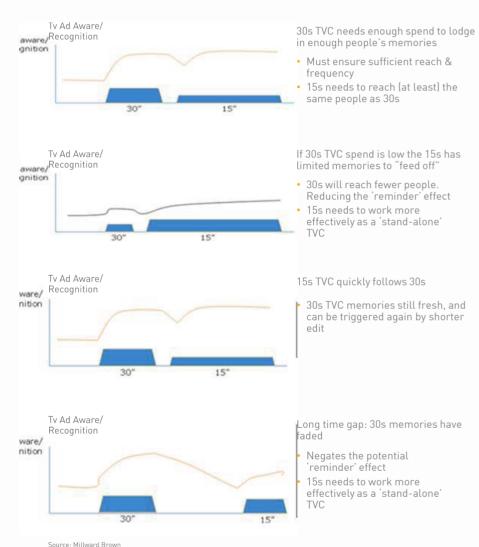
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## 3. TV AD LENGTH



TRANSITION FROM 30s TO 15s AFTER JTBD ACCOMPLISHED AND QUICKLY TO MINIMIZE AWARENESS IMPACT

- Transition for long to short ads after long ads have had enough weight and time on air to be effective on its communication objective
- Cut downs are meant to work as reminders of the longer ad
- The longer ad needs sufficient spend to be seeded in people's minds and work as a reminder. Shorter ads can follow after longer ads have seeded
- The gap between airing the longer and the shorter ads should be minimal so the memories of the longer ad remain fresh



## 4. DIGITAL IMPACT ON TV



TV CONTENT IS CONSUMED ACROSS MULTIPLE SCREENS GLOBAL TIME SPENT: Digital is 57% of daily media time
Social 48% of online

# Control F2

# Control F3

# Control

Source: GlobalWebIndex, Q4 2012, 31 countries

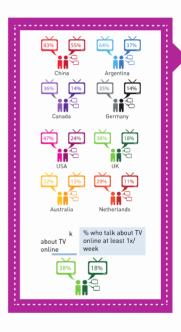
Source: GlobalWebIndex, Q4 2012, 31 countries

Which of the following

devices have you used

while watching TV?

DEVELOP CONTENT THAT CONNECTS MULTI-SCREENING BEHAVIOR



PARTNER MULTI-SCREENING: Using different devices to enhance overall experience e.g. texting or posting on Facebook about the TV show you're watching; looking up information about the actor in the show or about a product advertised

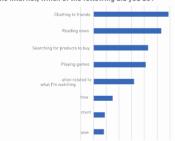
Improves entertainment

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MULTI-TASKING: Using different devices for unrelated activities. E.g. writing email or checking Facebook while you watch TV

• Improves efficiency

The last time you were watching TV and using the internet, which of the following did you do?



Source: GlobalWebIndex, Q4 2012, 31 countries

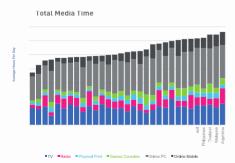
THE SMALLER THE DEVICE, THE SHORTER THE CONTENT VIEWED

Shorter content (<10 min) dominant on mobile & tablets

Share of Time Spent Watching Online Videos Worldwide, by Video Length and Device, Q1 2012

Desktop		
4.4% 19.4%	15.2% 7.1%	53.9%
Mobile		
<b>-</b> 4.1% 28	17.7% 8.4%	41.1%
Tablet		
-4.1% 24.49	6 16.9% 8.5%	46.0%
Connected-TV dev	vices and game consoles	
• 5.1%		88.5%
0.3% 2.6% 3.4%		
<1 minute 1-3 minutes	3-6 minutes 10+ minutes 6-10 minutes	
Note: numbers may Source: Ooyala, "Glo	not add up to 100% due to rounding bal Video Index Report Q1 2012," May 3	0, 2012
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D&E markets spending greater time on PC and Mobile devices



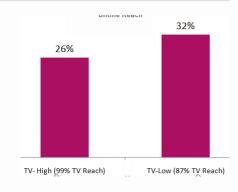
Source: GlobalWebIndex, Q4 2012, 31 countries

# 4. DIGITAL IMPACT ON TV



DIGITAL PROVIDES INCREMENTAL REACH AND REACHES LIGHTER TV VIEWERS





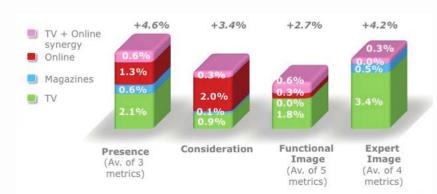
Source: Nielsen OCR U.S.



Case Study: Tresemme CrossMedia, Spain 2012

DIGITAL AND TV TOGETHER INCREASE BRAND METRICS

### KEY FINDINGS: TOTAL CAMPAIGN IMPACT



Case: Sunsilk, Malaysia Millward Brown Cross-Media 2011

# 5. DIGITAL CAMPAIGN DEPLOYMENT



▶ KEY STEPS TO INCREASE BRAND CUT THROUGH, AWARENESS & SALES IMPACT FOR THEIR DIGITAL CAMPAIGNS

APPLY DIGITAL
MEASUREMENT
FRAMEWORK (DMF) TO
GOLD CAMPAIGNS AND
CAMPAIGNS WITH 20%+
DIGITAL SPEND



CONDUCT DIGITAL
PREVIEW OR APPLY
DIGITAL GOLDEN RULES
PRIOR TO LAUNCH OF ANY
DIGITAL CAMPAIGN

### **BRAND PROMINENT THROUGHOUT**



### BRAND FEATURED IN LAST REVEAL



2012 36%

Driving a decrease from control to exposed on Prurchase Intent!

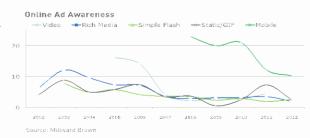
Source: 2013 Millward Brown / Firefly European Cross Media Database

 Negative brand equity impacted from digital ads not PreViewed or following Golden Rules

DEVELOP MULTIPLE AD UNITS WITH DIFFERENT MESSAGES AND AD FORMATS Video ads out perform rich ads, which out perform flash ads across brand metrics and consumer response

DEVELOP ADS FOR NEW PLATFORMS AND NEW AD FORMATS QUICKLY TO LEVERAGE STRONG BREAKTHROUGH AND BRAND AWARENESS

Bigger size ad units out perform smaller size ads on brand metrics



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# 5. DIGITAL CAMPAIGN DEPLOYMENT



TRACK COMPLIANCE BY SCORECARDING DIGITAL CREATIVE AGAINST DIGITAL GOLDEN RULES PRIOR AND POST LAUNCH

### **EXAMPLE OF SCORECARD QUESTIONS**

		Are there multiple creative ads for different consumer needs?
		IF PREVIEWED: Does the creative get noticed in less than 3 seconds ('Time to first contact' from eye-tracking)? (NA if not previewed)
		IF PREVIEWED: Do consumers accurately play back the main message (e.g., green on main point)? (NA if not previewed)
	Digital creative best practices	is branding included on each frame?
Ī		Is the call to action on each frame?
		Is the call to action direct (e.g., "click here for free sample" vs. "click here to expand")?
		Can each frame stand on it's own (e.g., branding, CTA, message, etc)?

### ▶ OPTIMIZING IN-MARKET IS A REQUIREMENT

- Identify optimization KPI during digital brief process
- All awareness campaigns should implement in-market Ad Dash optimization tool, where available, to compliment behavioral metrics

### ADDASH COMBINED WITH BEHAVIORAL METRICS DROVE CREATIVE OPTIMIZATION DECISION (U.S. CASE STUDIES)

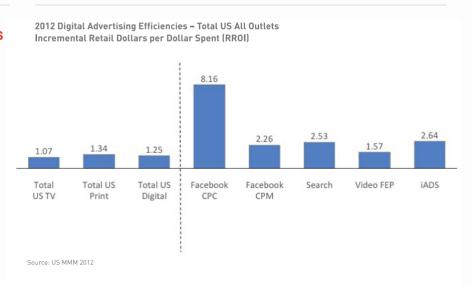
 Dove Men Face = Interaction Rate (IR) below benchmark, but significant lift in brand awareness (AdDash)

### ACTION: continue running the ad

 Dove Bar = IR & Click-through rate were strong, but significant decline on brand awareness (AdDash)

### ACTION: switched out ad with different creative

# IMPLEMENTING DMF AND GOLDEN RULES DELIVERS POSITIVE RROI



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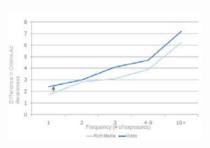
# 6. ONLINE VIDEO ADS

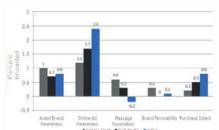


 PRE-ROLL VIDEO ADS FORCED VIEWING INCREASES BRAND RECALL



▶ VIDEO ADS CUT THROUGH AT LOWER EXPOSURE AND DRIVE AWARENESS AND PURCHASE INTENT

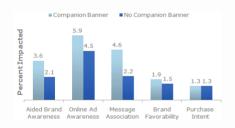




INCREASE BRAND
AWARENESS AND
PERSUASION METRICS
WITH COMPANION
BANNERS FOR
IN-STREAM VIDEO ADS



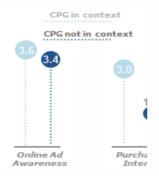
Similar impact on persuasion metrics



Source: Millward Brown MarketNorms, Last 3 years, Q1 2013

CONTEXTUAL PLACEMENT INCREASES BRAND AWARENESS AND PURCHASE INTENT

Consumers are more likely to be in a relevant mindset when on a contextually relevant site



Video Ad Units Source: Millward Brown MarketNorms, Last 3 years, Q4 2012

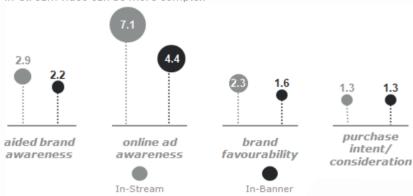
# 6. ONLINE VIDEO ADS



**TAILOR CREATIVE FOR IN-BANNER AND IN-STREAM VIDEO ADS** 

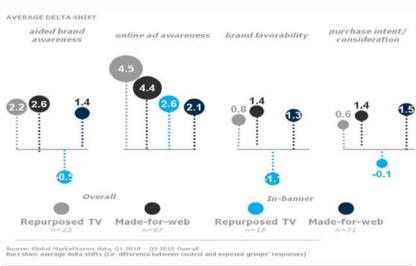
In-banner video: harder to cut-through cluttered Keep creative simple, as it will not have a captive audience

In-stream video can be more complex

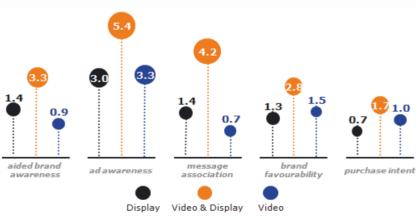


Source: Millward Brown MarketNorms, Last 3 years, Q4 2012

**▶** OPPORTUNITY FOR REPURPOSED TV TO RUN IN STREAM BUT IN **BANNER ADS MUST BE MADE FOR WEB** 



**▶ MAXIMIZE VIDEO AD IMPACT** WITH DISPLAY ADS



▶ DEVELOP VIDEO AD UNITS TO OPTIMIZE TO SCREEN WHERE TV CONTENT IS CONSUMED

## 7. CONTEXT MATTERS



### **WHY DOES CONTEXT MATTER?**

- Being in places that are contextually relevant to target means they pay more attention to your ad & purchase intent increases
- Sponsorships drive more increases in awareness than other brand metrics (equity, attribute endorsements)
- Can lead to increased retailer support, which can result in increased sales

### **TYPES OF CONTEXTUAL RELEVANCE**

PLACEMENT: Having brand/message in a place that is relevant to your target and your brand/message can be done through contextually relevant media buy or by sponsoring a contextually relevant

### CONTENT:

Integrating your brand into the content can be done by integrating into someone else's content OR by creating your own content

These two types of contextual relevance can be done in isolation or in conjunction with each other to make an even bigger impact

### **CONSIDERATIONS** WHEN CHOOSING AND EVALUATING **SPONSORSHIPS**

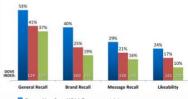


### **SUCCESS CRITERIA AND** BENEFITS

### RULE 1

Identifying the right sponsorship will drive awareness

Dove+Men US case study: Dove NCAA focused TV ads performed better across all metrics in NCAA tournament vs. other programming



Dove + Men Care Sports Ads

Dove + Men Care Non-Sports Ads

Source: Nielsen IAG Research, 3/1/11-4/2/12,

### RULE 2

Ensure sponsorship is linked to brand proposition & has high target affinity



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## 7. CONTEXT MATTERS

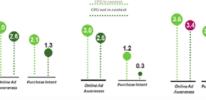


### RULE 3



Source: AdIndex, Dove Conditioner US

Ensure online ad creative is contextually relevant and placed on contextually relevant sites



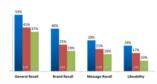
Rich Media Simple Flash In context n=47 Out of context n=200 In context n=44 Out of context n=189

Video In context n=18 Out of context n=78

Source: Global Marketnorms database, Q4 2012, Last 3 years. Bars show average delta shifts (i.e. difference between control and exposed groups, responsed

Dove NCAA journey to comfort ad performance based on M25-54

Dove NCAA journey to comfort ads vs. Dove Men + Care's sports ads & non-stop ads



Dove + Men Care Sports Ads Dove + Men Care Non-Sports Ads

Source: Nielsen IAG Research, 3/1/11-4/2/12,

### **RULE 4**

Ensure single killer message - enhanced by content

Campaign Main Message: Sedal presents its new line of natural ingredients

Sponsorship Main Message: Sedal presents its new line of natural ingredients





### **RULE 5**

Create a robust 360 campaign around sponsorship and content integration

### **EXAMPLE**

Dove China created a 360° campaign around the Ugly Betty show:

- New Dove TVC using Betty
- Logo, Billboard, trailers of Dove featuring the drama
- Online campaign with Betty's blog
- In-store



WHEN PRODUCT IS INTEGRATED AS RELEVANT PART OF STORY, ENJOYMENT & RECOGNITION INCREASE





### **▶ TOTAL BRAND BENEFITS VERSUS VARIANT**

**Brand Recall** 







98%

99%

98%

Pond's Age Miracle

Dave H&B

Tresemme Perfect Ends

Case: Trasammo /Dova/Ponds "10 años monos" -Mexino 2012

Inegrated as part of story:

Sensei – the product was part of participants new look process
Shiraz – the product was a tool to look great



SHIRAZ

66%

Extremely Direct
Participants were doing an ad about the product.

SAUVAGE



45%

Case: Sedal "Mexico's Next Top Model" - Mexico 2012

60%

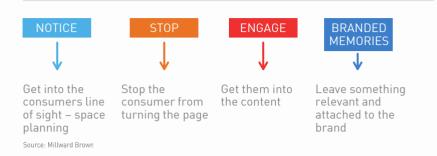
ONE CONSUMER

GL⊕\*AL **⊠E***™*|@

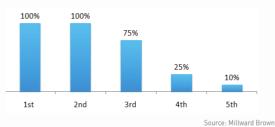
## 8. PRINT



► KEY STEPS IN EFFECTIVE MAGAZINE ADVERTISING



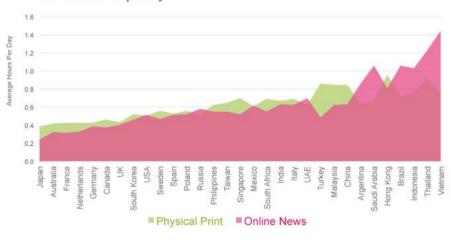
▶ RAPID WEAR OUT OF MAGAZINE ADS



- Source: Millward Brown
- Magazines 1st OTS delivers 1.8 times great awareness
- Ad awareness influenced by contextual relevance of placement and magazine

DECREASES IN PHYSICAL PRINT SUBSCRIPTIONS OFFSET BY DIGITAL SUBSCRIPTION GROWTH

# PHYSICAL NEWS V ONLINE NEWS: News most digitised media On + Offline at parity



Source: GlobalWebIndex, Q4 2012, 31 countries

- Although still a small percentage of total print readership (2.4%), digital readership of magazines is growing rapidly, +60% in Jul-Dec '12 vs. previous period in the US
- Top 50 digital publications are growing faster than Print edition is decreasing