AGENDA

- Background
- Review Nielsen’s 3 R Framework
  - Reach - Digital (Digital Campaign Ratings)
  - Resonance - TV Brand Effect
  - Reaction - Nielsen Buyer Insights
- Wrap up/ Questions
OUR HERITAGE

WATCH

BUY

global servicing model
100 countries in traditional and modern trade
comparable metrics across all media
world-class analytics
leading innovation
NIELSEN’S 3R FRAMEWORK: MAKING AD EFFECTIVENESS MAKE SENSE

REACH
Reach the right people

RESONANCE
Influence their opinion

REACTION
Impact their behavior

Did my intended audience see my campaign?

Did my campaign deliver the desired brand impact?

Did my campaign deliver the desired consumer response?

How can I best allocate ad spend to reach my target consumers?

How can I optimize my campaign?

How can I measure and maximize the ROI of my advertising spend?
HOW OUR CLIENTS LEVERAGE NIELSEN'S 3R SOLUTION

Advertising Goal

REACH
Reach the right people

RESONANCE
Influence their opinion

REACTION
Impact their behavior

Solution & Usage examples

Digital Campaign Ratings
- Measure reach and frequency of online campaigns and receive online GRP/TRP guarantees.
- Determine if results reached desired target audience (e.g., card targeted towards women 25-45 but reached men 55+)
- Measure the incremental reach of TV/Online campaign

X-Platform Campaign Ratings

TV Brand Effect
- TV Ad performance for their ads and their key competitors’ ads (it’s syndicated)
- Brand Preference measured in “real time”
- Likelihood to acquire the product

Digital Brand Effect

Nielsen Buyer Insights
- Measure the sales lift by ad exposure/frequency
- Measure the sales lift by Individual level exposure/sales
- Optimize advertising mix and promotional tactics

Attribution Modeling

Market Mix Modeling
REACH: DIGITAL CAMPAIGN RATINGS
NIELSEN DIGITAL AD RATINGS (OCR) –
FIRST TRUE MEASUREMENT OF DIGITAL & CROSS-PLATFORM CAMPAIGN REACH. ENABLES ADVERTISERS AND AGENCIES TO...

Measure digital media with metrics consistent with TV
- Reach, Frequency, GRPs, Viewability metrics by demographics, DMA, publisher, and placement
- Improved marketing mix modeling inputs

Negotiate more strongly with publishers and optimize digital plans in-flight
- Only MRC accredited approach for online demographic reach measurement
- Daily tracking of audience and on-target %
- Strong support among both buyers and sellers

Explore and affect cross-platform synergy across online and TV or mobile advertising
- Strategically maximize your unduplicated reach or reinforce your message across mediums to best meet your marketing objectives
DIGITAL LEARNINGS – EFFICIENTLY REACHING AUDIENCE TARGETS CAN BE CHALLENGING

>23,000
EXTERNAL CAMPAIGNS
MEASURED TO DATE

WITH
>600
UNIQUE OWNERS

59%
AVERAGE PERCENTAGE OF ON-TARGET DEMO IMPRESSIONS OVERALL

43%
AVERAGE PERCENTAGE OF ON-TARGET IMPRESSIONS FOR NARROWLY DEFINED AGE GROUPS (<15 YEARS)

64%
AVERAGE PERCENTAGE OF IMPRESSIONS SERVED OUT OF VIEW OR TO BOTS ACROSS THE INDUSTRY
LEADING ADVERTISERS OPTIMIZE IN-FLIGHT WITH DCR AND ENSURE EFFECTIVE CAMPAIGN DELIVERY

ON-TARGET PERCENT

- Identify under-performing publishers/sites/placements
- Understand how different categories of ad placements perform with different demos

VIEWABILITY

- Understand what percent of your campaign had the opportunity to be seen by a user in a viewable portion of the screen
- Identify fraudulent views

Optimize campaign reach in-flight and negotiate viewable on-target reach guarantees to maximize ROI
DCR EMPOWERS CLIENTS TO NEGOTIATE GUARANTEED AUDIENCE DELIVERY

Immediately maximize ROI, tie publisher pay to true delivery, and ensure quality placements with DCR-based reach guarantees.
RESONANCE:
TV BRAND EFFECT (TVBE)
TV BRAND EFFECT IS AN IN-MARKET PERFORMANCE ASSESSMENT TOOL

- Daily surveying of consumers about the National TV Shows they watched the day before and the ads we know they were exposed to
- Based on in-home exposure to reflect natural viewing environment
- Weighted daily to align with US TV population
- It’s syndicated... continuous measurement of nearly all ads on TV
- Ad effectiveness is always measured in the context of the media environment
- Key Performance Dimensions: Ad Memorability, Brand and Message Memorability and Appeal
BRAND EFFECT PROVIDES DATA-DRIVEN CONSULTATION ON HOW CLIENTS CAN SHARPEN THEIR AD PERFORMANCE

TV Brand Effect

Client

Ad Quality
• Assessment of branding, messaging and breakthrough
• What creative elements work?

Ad Rotation
• Identify strongest performers early in flight
• Can control for media weight
• When to shift to :15s; :30s, etc.

Media Allocation
• Performance:
  o By Network & Genre;
  o By Demographics
• Program Engagement to inform media buys

Competitive Insights
• It’s syndicated - learn from what others are doing in the category
  o Are they developing new copy and is it working?
  o Impact of competitive clutter
THE IMPACT OF TV ADS ARE MEASURED VIA SURVEYS ONLINE

1. Viewers watch TV in normal, real-world environment—NOT FORCED EXPOSURE
2. Nielsen records TV ads within coverage
3. Nielsen editorial teams write surveys for all covered content nightly
4. Panelists choose the shows viewed the previous day
5. Panelist answers 5 core questions about the ads that appeared in those shows
6. Data is available for ad performance analysis within 48-hours
REWARD TV PANEL SNAPSHOT

- Over 6 million registered users weighted align with the US TV viewing population
- Diverse set of panelists acquired through various sources
- ~26K unique individuals participate weekly and take 4+ quizzes per week on average
- Data is reweighted daily to the TV Viewing Population
- High panel turnover rate (~65% new each month)
AD PERFORMANCE IS DEFINED BY 5 SIMPLE QUESTIONS

AMONG AD VIEWERS THAT HAD THE OPPORTUNITY TO SEE ADS

1. WHAT HAPPENED IN THE AD?
2. WHO WAS BEING ADVERTISED?
3. WHY SHOULD I BUY IT?
4. DID I LIKE THE AD?
5. AM I GOING TO BUY IT?

TVBE METRICS

- AD MEMORABILITY [BREAKTHROUGH]
- BRAND MEMORABILITY [NET IMPACT]
- MESSAGE MEMORABILITY
- LIKEABILITY [TOP 2 BOX]
- PURCHASE INTEREST [TOP 2 BOX]
### SAMPLE SURVEY: LENDING TREE “UNDERWEAR (:30)”

| **AD MEMORABILITY** | In a commercial during this show, who discussed a financial services Web site with a man who looked at himself in a mirror while preparing to go to the bank?  
• Green puppet wearing only his underwear who stated that was how he dressed to get a mortgage  
• Pale vampire who appeared from a puff of smoke and desperately needed to extend his line of credit  
• Alien who wanted to lower his interest rates to pay off debts and showed a picture of his growing family  
• Clumsy clown who had a car accident and was trying to find out if he could take out a loan for expenses |
| **BRAND MEMORABILITY** | What was this a commercial for?  
• LendingTree.com  
• Fannie Mae Foundation  
• Champion Mortgage  
• H&R Block |
| **MESSAGE MEMORABILITY** | According to this commercial, why should you call or visit LendingTree.com?  
• Provides you with multiple competitive offers  
• Waives your application fee immediately  
• Has payoff programs designed for your needs |
| **LIKEABILITY** | How much did you like this advertisement?  
• I liked it a lot  
• I liked it somewhat  
• I am neutral  
• I disliked it somewhat  
• I disliked it a lot |
TVBE HELPS EVALUATE IN-MARKET PERFORMANCE AGAINST COMPETITORS AND HISTORICAL NORMS

- LendingTree’s ad performance in 2014 has improved significantly from 2013
  - Brand association was very strong among the viewers who recalled the ads
- LendingTree and Quicken at parity on advertising resonance in 2014 so far

Ad Breakthrough & Branding Performance (Cumulative)

<table>
<thead>
<tr>
<th></th>
<th>LendingTree - A</th>
<th>Quicken - B</th>
<th>2013 LendingTree - C</th>
<th>2013 TVBE Norm - D</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Recall</td>
<td>40% C</td>
<td>42% C</td>
<td>35% C</td>
<td>41% C</td>
</tr>
<tr>
<td>Brand Linkage</td>
<td>BCD 72%</td>
<td>D 68%</td>
<td>D 67%</td>
<td>56%</td>
</tr>
<tr>
<td>Brand Recall</td>
<td>CD 29%</td>
<td>CD 29%</td>
<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>

A letter above a number indicates a significant difference at the 90% Level of Confidence

Source: Nielsen TV Brand Effect LendingTree, Quicken 1/1/14 – 7/31/14. Based on A18+
• LendingTree did a much better job of communicating its message as compared to Quicken
• Appeal can be used to track wear out

### Messaging and Appeal (Cumulative)

<table>
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<tr>
<th></th>
<th>LendingTree - A</th>
<th>Quicken - B</th>
<th>2013 LendingTree - C</th>
<th>2013 TVBE Norm - D</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>75%</td>
<td>73%</td>
<td>73%</td>
<td>53%</td>
</tr>
<tr>
<td></td>
<td>56%</td>
<td>45%</td>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>

**Message Linkage**

Among those who recall the ad and the brand, the percentage who could recall the message

**Likeability Linkage**

Among those who recall the ad and the brand, the percentage who could liked the ad “a lot” or “somewhat”

A letter above a number indicates a significant difference at the 90% Level of Confidence

Source: Nielsen TV Brand Effect LendingTree, Quicken 1/1/14 – 7/31/14. Based on A18+
**USE TVBE TO INFORM AD ROTATION**

- *Underwear* and *Break Up* were the heaviest supported spots in the year, and also the key drivers of LendingTree’s Brand Recall performance.
- TVBE also has the ability to level set ad performance by controlling for GRP level.

**2014 LendingTree Brand Recall by Ad**

- **Mortgage - Glen - Underwear (:30)**: 35%
- **Mortgage - Glen - Break Up (:30)**: 25%
- **Mortgage - First Kiss (:15)**: 18%
- **Mortgage - Glen - Marriage (:30)**: 13%
- **Mortgage - Dummy (:15)**: 7%

Sample too low to report on *Mortgage – Death Contract*.  
ONGOING BRAND AND COMPETITOR TRACKING FOR WHEN OPTIMIZATION IS NEEDED

- Use TVBE to track LendingTree and competitor brands on a bi-weekly/monthly basis to make performance improvement decisions in real time

**Trended Brand Recall: LendingTree vs. Competitors**

Minimum sample shown = 100
Source: Nielsen TV Brand Effect 1/1/13 – 7/31/14. Based on A18+
OPPORTUNITY TO SHIFT WEIGHT TO HIGHER-PERFORMING NETWORKS

2014 LendingTree Ad Results by Network

Size of bubble indicates GRPs*

*GRPs within Nielsen’s coverage area only
Source: Nielsen TV Brand Effect 1/1/14 – 7/31/14. Based on A18+
SUMMARY OF TVBE’S UNIVERSAL CREATIVE BEST PRACTICES OF HIGHLY MEMORABLE TELEVISION ADS

Common Creative Characteristics of Highly Memorable Ads

Brand Cues
Early & Often, Visual & Verbal
- Leverage Brand Icon
- Integrate Brand in Storyline
- ‘Ownable’ Creative Concept
- Message as Brand Cue

Novel/Striking
Visual Imagery
- Build an Emotional Connection (humor or sentimentality)

Upbeat & Simple Storyline
to engage viewers from start-to-finish (avoid quick-cut montages)

Relatable
Characters & Situations

Ad Memorability Drivers

Brand Drivers

Source: Cumulative cross-client learning, and multiple publicly shared TV Brand Effect (TVBE) meta studies

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REACTION: NIELSEN BUYER INSIGHTS (NBI)
MEASURE CONSUMER REACTION TO A CLIENT’S ADS

Nielsen Buyer Insights is an innovative single source database provides new opportunities for measuring media impact and improving media efficiency.

Nielsen Buyer Insights integrates:

- Based on actual TV, online ad schedules and exposure
- Cut at creative and campaign level
- Sortable by demo, media type, timing
- Across range of competitors

- Representing credit card purchases and deposit account activity
- Sortable category code and outlet type
- Comprehensive coverage across banks/card issuers
NBI - A POWERFUL, YET FLEXIBLE TOOL

NBI has been used by a number of large Financial Institutions (and others) to measure the impact of their advertising. We have measured the impact of advertising on:

- Card ownership
- Sales penetration
- Balance penetration
- End of period balance
- Spend per card user
- Transactions per card user
- Dollars per transaction on card
- Share of spend
- Card primacy (top of wallet)
- Total credit card category dollars
- Total credit card category transactions
MEASURE AD IMPACT AND COMPARE TO OTHERS

Bank ABC’s ads have not been as successful as competition in driving share of spend.

AD IMPACT ON SHARE OF SPEND

3.6%

-1.2%

5-BANK BENCHMARK (2012)

BANK ABC (2012)

Recommend leveraging NBI to evaluate the recent Bank ABC card campaign and compare against a competitive benchmark.

Source: Nielsen NBI
WHAT MAKES NIELSEN DIFFERENT

• Independence and 3rd party credibility

• Broadest “Spend” data access – ~80% of credit card transaction data

• “Watch” data – gold standard Nielsen panels and near census data sets

• Long standing “Single Source” experience via Nielsen Catalina Solutions (~5 years) and Nielsen Buyer Insights (~2 years)

• Deep Modeling Expertise -- Largest Mix Modeling business in the world

• Data Science –To address inherent data biases

• Highest level standards and protocols to ensure privacy compliance
THANK YOU!
APPENDIX
**Broadcast & Cable Network Coverage**

### Broadcast Network Coverage
- **FOX** is measured Monday thru Friday 8-10pm and Saturday thru Sunday 12-10pm.
- **CW** is measured Monday thru Friday 8-10pm and Sunday 7-10pm.
- **Telemundo** and **Univision** are measured Monday thru Sunday 7-11pm.
- **ABC, NBC, CBS** are measured Monday thru Friday from 8-11pm and Saturday thru Sunday from 12-11pm with the following exceptions:
  - Nightline
  - Jimmy Kimmel Live
  - Tonight Show with Jay Leno
  - Saturday Night Live
  - Nightly National News – All networks
  - Late Late Show with Craig Ferguson
  - Late Show with David Lettermen
  - Late Night with Jimmy Fallon

### Cable Network Coverage
All Cable Networks (listed below) are measured Monday thru Sunday from 6-12 pm.
- Comedy Central
- VH1
- TNT
- USA
- Food Network
- Lifetime
- Discovery Channel
- Bravo
- TLC
- History
- TBS
- Nick@Nite
- ESPN
- HGTV
- MTV
- F/X
- SyFy
- Speed
- A & E
- OWN (2011 only)
- National Geographic (as of 6.1.12)
- TruTV (as of 7.1.12)
- AMC (as of 10.1.12)
- Cartoon Network (as of 7.1.12)

### Syndication Coverage
- Jeopardy
- Insider
- Extra
- Entertainment Tonight
- Wheel of Fortune
- Access Hollywood

### Sports
- Weekend Sports
- Regional 4pm NFL
- Selected 1pm NFL

### International Coverage
- Syndicated coverage in the UK: 6 PM to Midnight (Channel 4, Channel 5, Sky, ITV)
- Client-Specific Coverage: Germany, France, Russia, Australia, China, Mexico, Italy
DCR/XCR DELIVERY EXAMPLES

- Depending on the products included in contract and the size of the media plan, the delivery of data varies by campaign.

Dashboard Delivery

DCR/XCR are designed to be agency/advertiser dashboard tools. Available API for MMM.

Formal Delivery (PPT)

Integrated Digital Deliverables will include formal presentations.
OBE DASHBOARD: PURCHASE INTENT

INSIGHT
Ad exposure drove a 22% lift in Top 2 Box Purchase Intent.

SAMPLE
Visual indication that the sample is highly stable with a data tolerance of +/-5% at the 95% confidence interval.
OBE NORMS: HOW GOOD IS YOUR BRAND LIFT?

ACME Purchase Intent Example - Full Campaign

Vizu Norms Comparison

20%

Higher than the Average purchase Intent brand lift

Your Campaign Performance Relative to Vizu Normative Results

Your campaign lift score of 21.9% is above the average score for other Objective Norm campaigns measured by Vizu. It is also above the average score for Primary Category Norm campaigns, and above the average score for Subcategory 3 Norm campaigns.

In all dimensions the lift results for your Subcategory 3 Norm campaign were above the average scores indicated by the center circle for each category on the chart.
OBE DASHBOARD: CREATIVE STRENGTH

INSIGHT: By slicing the 22% brand lift at the creative level, you can see that pre-roll ads were most effective. Nearly 50% of respondents indicated purchase intent.
OBE DASHBOARD: SITE DRIVERS

IMPLICATIONS:
Couple the insights from OBE together to drive some actionable strategy. In this case, it looks like ACME product probably resonates with males who are watching sports highlight videos online. There could be an optimization opportunity to have the ad network reallocate impressions to heavier video sites that aggregate male skewing content.

INSIGHT:
By analyzing brand lift at the site level, you can see which publishers are driving the largest lifts. In this case, sports.com, has an 81% brand lift.

INSIGHT:
Also take into consideration the sample sizes. Sports.com has the largest control and exposed sample, which is the best indicator of data reliability.
OBE DASHBOARD: BRAND LIFT BY FREQUENCY

ACME Purchase Intent Example - Full Campaign

67% 5-9 Exposures Brand Lift

Frequency Performance

Lift: 62.7%

Exposures

1. Control
2. All Exposures
3. 1 Exposure
4. 2 Exposures
5. 3 Exposures
6. 4 Exposures
7. 5 Exposures
8. 6 Exposures
9. 7 Exposures
10. 8 Exposures
11. 9 Exposures
12. 10 Exposures
13. 11-15 Exposures
14. 16 Exposures

Control

Lift N/A