

REACH & FREQUENCY RESEARCH STUDY



UBISOFT MICHAEL JACKSON: THE EXPERIENCE
FR, DE, UK, CAMPAIGN DECEMBER 2010



BACKGROUND & OBJECTIVES



Ubisoft ran a multi-media campaign for the launch of the video game “Michael Jackson: The Experience” in UK/DE/FR

- ★ The campaign ran during 5 weeks on TV, from November 23rd to December 30th (variation per country).
- ★ Meanwhile, the YouTube campaign was online during 11 days, from November 25th to December 5th, with pre-roll, ROS and sponsored videos. The YouTube campaign also included an expandable masthead.
- ★ Target groups: primary 15-34 – secondary 15-49

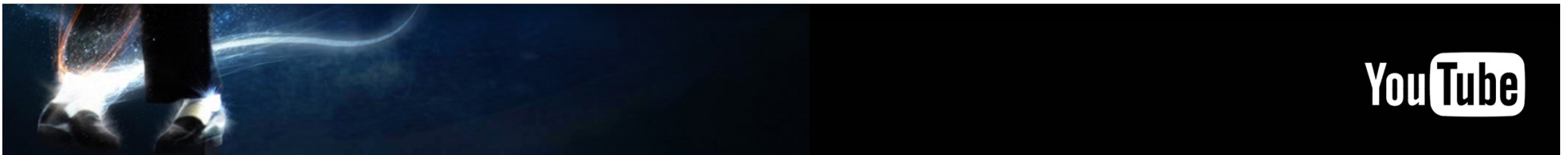
Research was conducted with GFK & MarketingScan to understand:



The overall impact of each media and each YouTube format in the mix-media in terms of reach and frequency.



The incremental impact of YouTube in term of reach, frequency and profiles.



METHODOLOGY

MEASURING PERFORMANCE OF TV&YOUTUBE

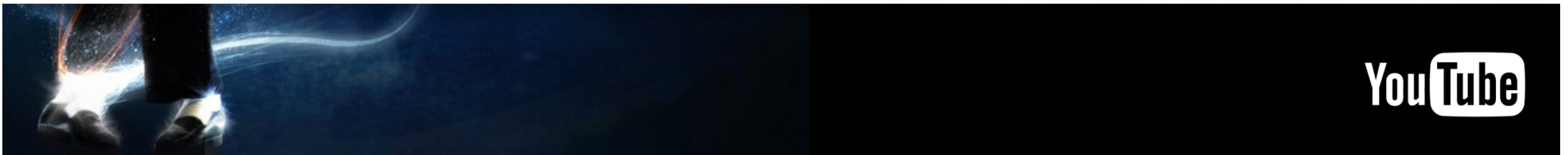
The objective is to quantify media performance of the campaign on target group (FR, UK and DE)

Measuring Advertising Exposure

- ★ Study is based on “**Media Efficiency**” **Panels** in each country, for which media consumption of each panelist is monitored on a continuous basis for TV & Internet.
- ★ Media consumption data is crossed with detailed Media Plan of the campaign (provided by Agency) to determine the **exposure to advertising** for each panelist (have they seen/not seen the ad).

Creating Performance Indicators

- ★ Analysis of exposure data within the panel – representative of the online population - enables to **recreate classic media planning indicators** (reach, frequency, GRP, all based on online users only), which attest for media performance of campaign.
- ★ Additionally, exposure data from specific YouTube formats enables to create **media planning indicators of YouTube campaign** (reach of YouTube formats)



MEDIA PLAN

UBISOFT MICHAEL JACKSON: THE EXPERIENCE



November

December



23 NOV - 20 DEC



25 NOV - 23 DEC



24 NOV - 30 DEC



25 NOV - 5 DEC



25 NOV - 6 DEC



25 NOV - 5 DEC

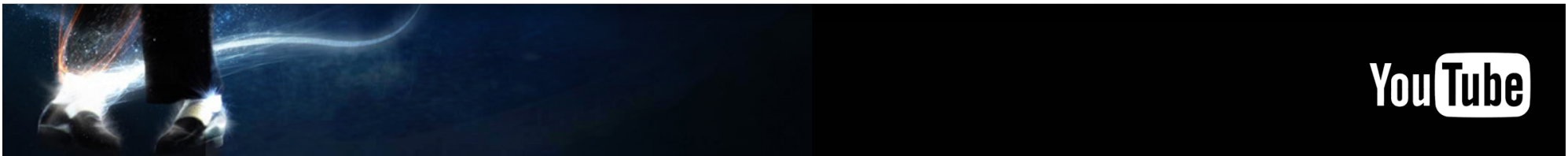


Key moment: **Homepage**
Expandable masthead

December 2nd



December 3th



1

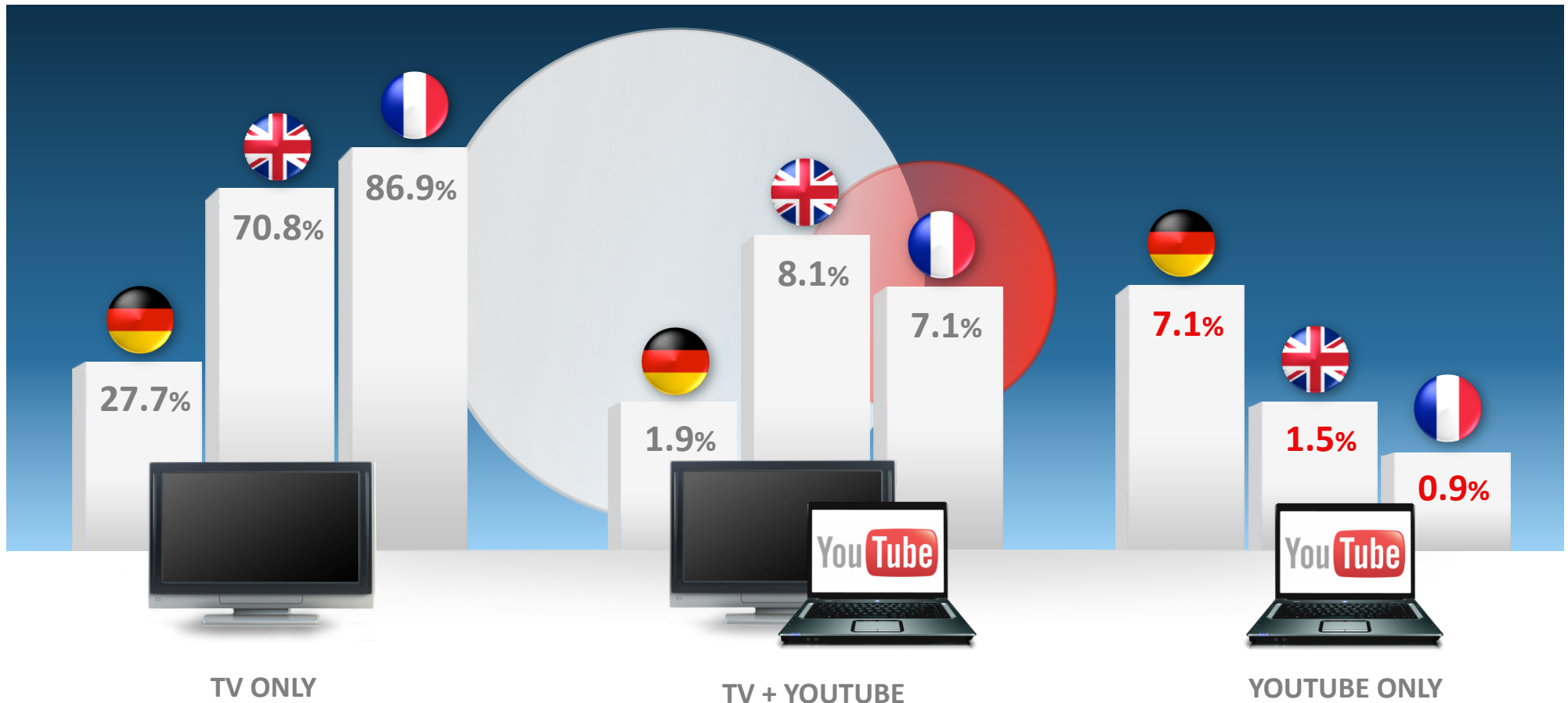
DRIVING INCREMENTAL REACH



YouTube

INDIVIDUAL NET REACH OF YOUTUBE

Target population is age group 18-49.



REACH

A significant proportion of those exposed to YouTube had **no contact with the TV campaign**. The ability of YouTube to achieve incremental is correlated to the net reach of the TV campaign.

* Net Reach & Incremental Reach of TV & YouTube based on target group 18-49 yo.



2

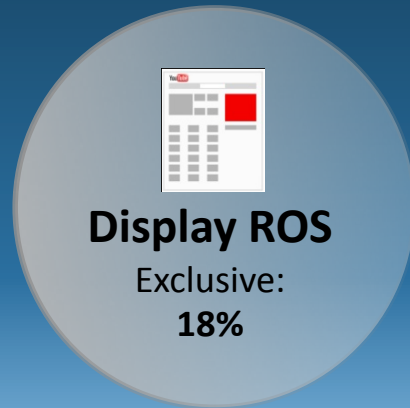
MAXIMIZING POTENTIAL OF YOUTUBE



MAXIMISING POTENTIAL OF YOUTUBE

2.1 - YOUTUBE FORMATS ARE COMPLEMENTARY

Incremental net reach of YouTube ad formats (% of total YouTube reach*)
of YouTube formats based on average for FR, UK and DE campaigns



Mixing YouTube ad formats : 22%

Each YouTube ad format achieved similar levels of reach and incremental reach, which show YouTube ad formats are complementary.

Incremental net reach of YouTube ad formats is % of people exposed to YouTube that are **only exposed to one format**
Pre-roll generated 2% incremental reach

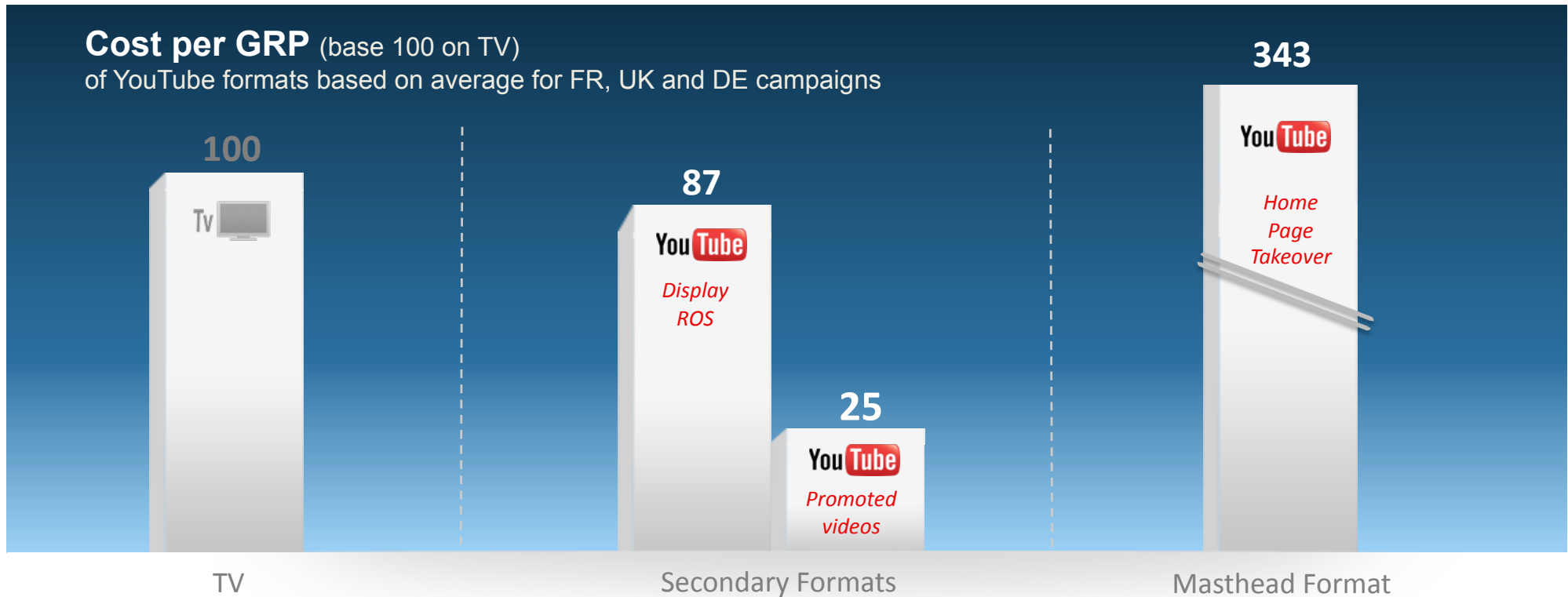
* Average distribution of YouTube (FR, UK, DE) in between incremental reach of each YouTube format and reach of a combination of formats



MAXIMISING POTENTIAL OF YOUTUBE

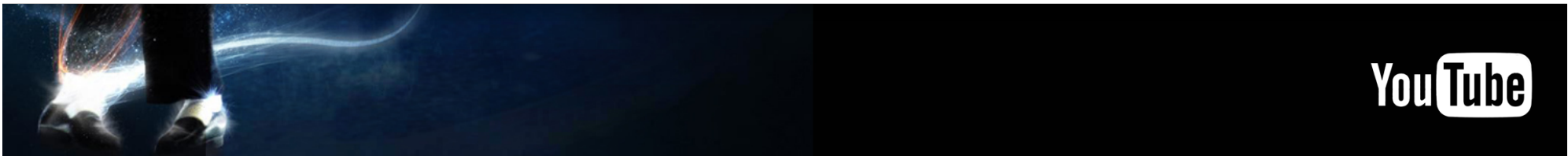
2.2 - ACHIEVE REACH AT LOW COST WITH ROS

Cost per GRP is cost per additional GRP point.



YouTube Secondary Formats (PV and Display ROS) are consistently **cost-effective** to reach Ubisoft target compared to TV.

Index of Cost per GRP based on average for UK, DE and FR – 18-49
Base 100 on TV



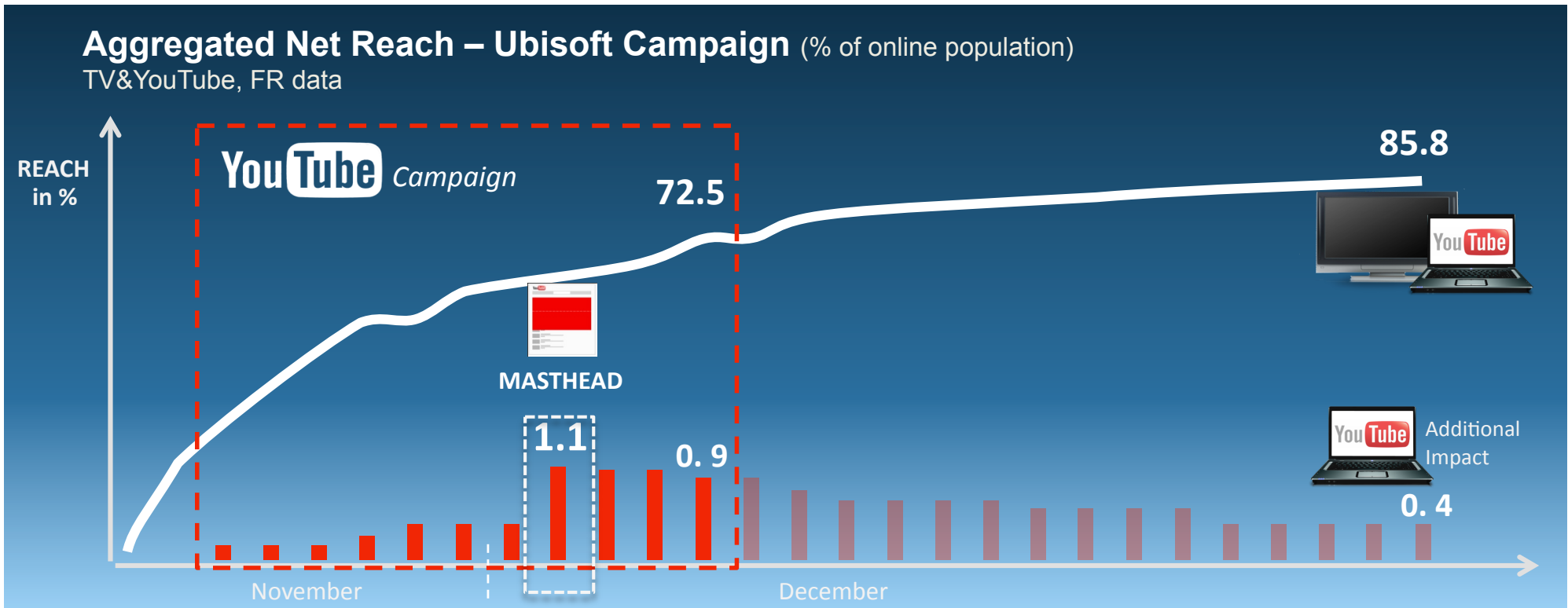
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OPTIMIZING CROSS-MEDIA: FLIGHTING



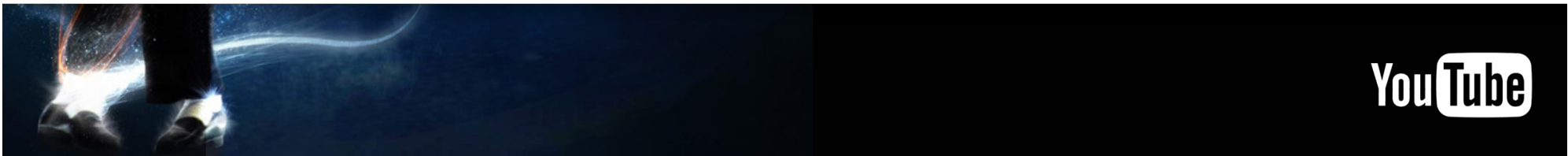
OPTIMIZING CROSS-MEDIA: FLIGHTING

3.1 - MASTHEAD: A MEDIA BURST STRATEGY



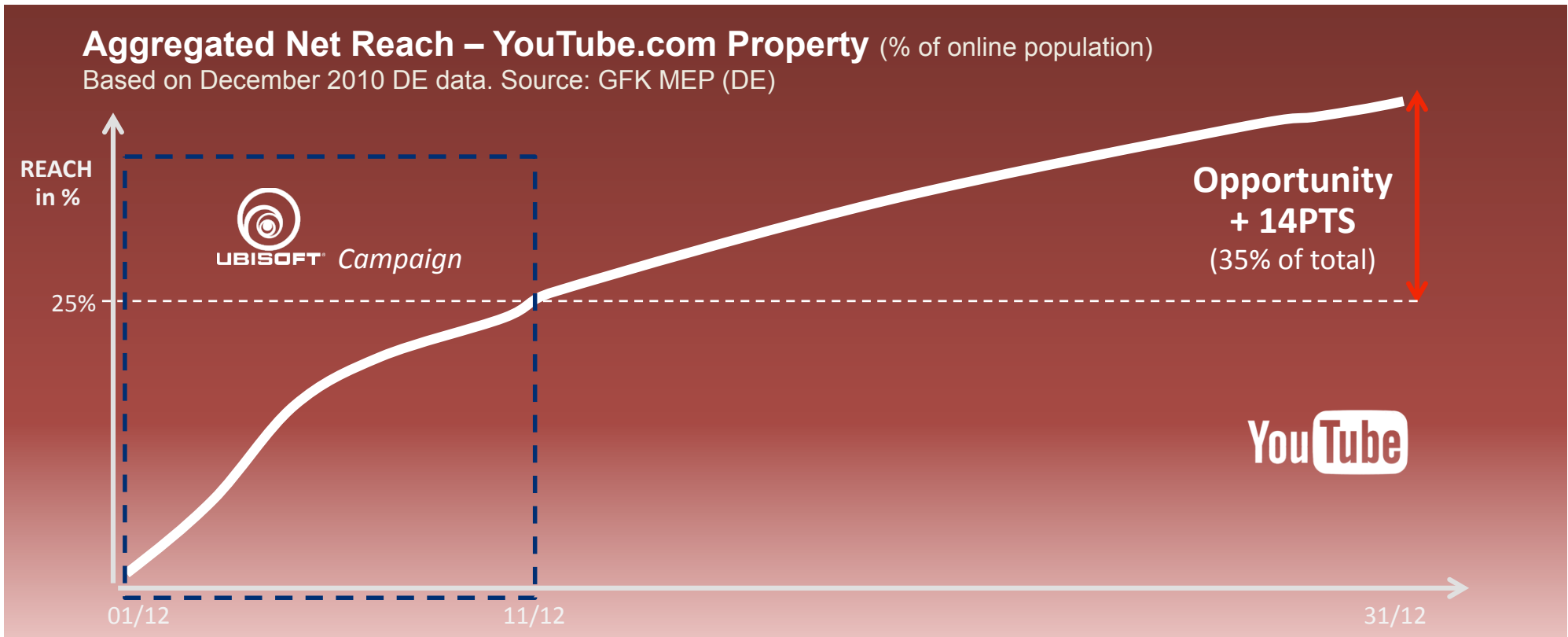
Progression of total reach across campaign (YouTube & TV), example of FR

- ★ A peak in term of additional reach generated by YouTube thanks to the HP.
- ★ If the TV campaign had ended the same day as YouTube, there would have been a +0.9% incremental reach (versus +0.4% at the end of the TV campaign).
- ★ Based on FR data as this is the most competitive market in terms of TV weight



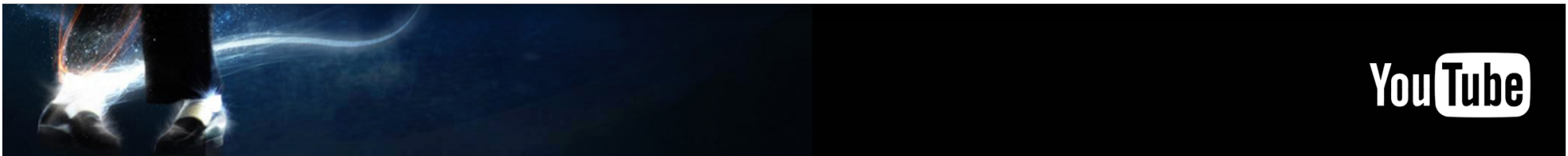
OPTIMIZING CROSS-MEDIA: FLIGHTING

3.2 - THE OPPORTUNITY OF A LONGER YOUTUBE SCHEDULE



YouTube is a media that builds reach slowly:
a longer presence on YouTube will help maximize its reach potential.

Aggregated Net Reach over one month shows typical reach accumulation curve of YouTube



YOUTUBE: LEARNINGS TO OPTIMIZE CROSS-MEDIA CAMPAIGNS

1

DRIVING INCREMENTAL REACH FOR YOUR CAMPAIGN

YouTube drives **incremental reach across FR, UK and DE**, even more so if the TV campaign had ended the same day.

2

MAXIMIZING POTENTIAL OF YOUTUBE AS A COMPLETE MEDIA

YouTube formats are complementary: each YouTube ad format achieved similar levels of reach and incremental reach.

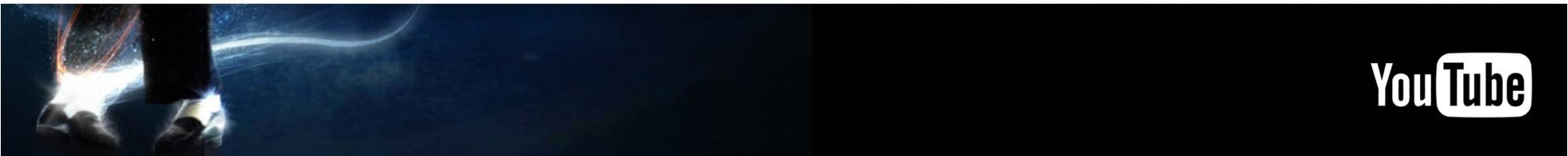
YouTube can optimize cost-efficiency of cross-media campaigns: Run Of Site formats (PV and Display ROS) are cost-effective to reach Ubisoft target compared to TV.

3

FLIGHTING THE OPTIMAL YOUTUBE/TV CROSS-MEDIA CAMPAIGN

Masthead drives reach & incremental reach over one day (media burst): if placed before or after TV campaign, a Masthead maximize incremental reach of YouTube, especially among core target groups 16-34 yo.

A longer YouTube schedule - achievable with alternative formats (ROS, Pre-roll) - **will help maximise reach potential of YouTube over 4 weeks** and allow a greater cost-efficiency.








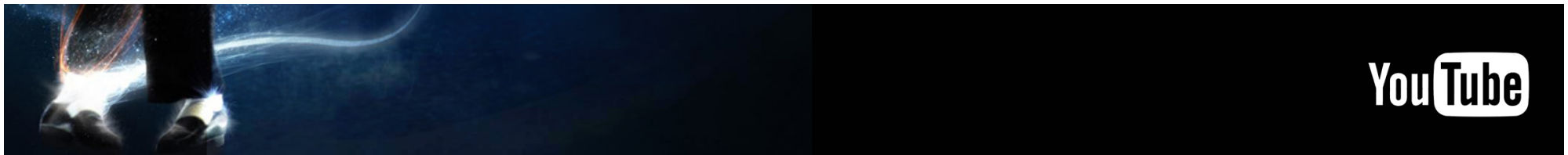
APPENDIX

METHODOLOGY

RESEARCH INFRASTRUCTURES IN FR, UK & DE

Google leveraged existing panels with working relationships in the UK, Germany and France for the first pan-European Reach & Frequency analysis.




Country	Panel	Panel Size	TV Measure	Online Measure	Notes
UK		N=17,000 households; online users, Age 16yo+	Surveyed (Opportunity To See)	Metered (Nurago Cookie) Home computer only.	Audience measurement “currency” in UK
Germany		N=15,500 individuals in household; online users, Age 14yo+	Metered (sound matching)	Metered (Nurago Cookie) Home computer only.	Audience measurement “currency” in Germany
France		N=5,200 households, online users, Age 15yo+	Metered (audience box)	Metered (Alenty Cookie) Home + Work	FMCG research experts. Panel based on Angers, Le Mans, Poitiers

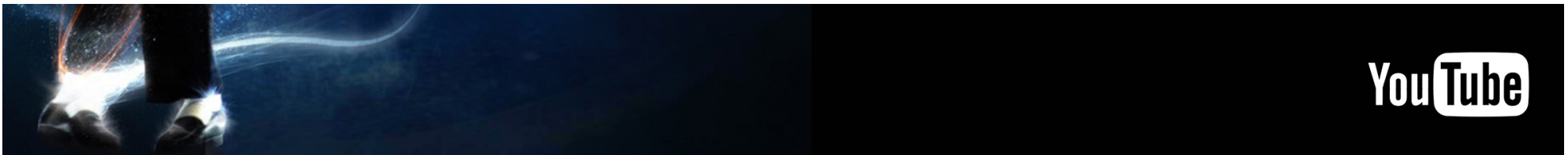


METHODOLOGY

SAMPLE SIZES

Sample sizes of exposure groups for Ubisoft Michael Jackson:The Experience research – number of panelists.

Country	Panel	Total	Exposed to TV	Exposed to YouTube
UK		17,000	5,469	495 (Promoted Video: 221, ROS: 206, Masthead: 238)
Germany		15,500	4,556	702 (Promoted Video: 199, ROS: 212, Masthead: 396)
France		5,200	4,434	174 (Pre-Roll: 20, ROS: 67, Masthead: 118)



METHODOLOGY

COMPARING RESULTS W/ MEDIA PLANING DATA (AGENCY)

There are objective reasons why the research infrastructure of the Ubisoft-Google Reach & Frequency analysis will under-estimate reach of TV as compared to media planning data from the Agency

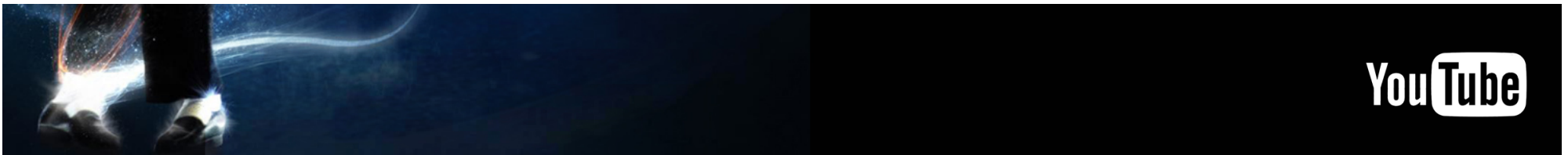
★ Universe.

★ The analysis is **based on online population only**, therefore TV is only measured in online households. Because TV usage in offline households is usually higher than in online households, TV reach will be usually higher when based on total population (like traditional media planning) than when based on online population only.




★ Scope of TV Measurement.

★ Only **the primary TV Set** in the household is measured by the infrastructure, meaning that consumption on any secondary or tertiary TV sets will not be measured.

★ Specific to Germany: Not all TV stations where the ads are shown were covered in the GFK infrastructure (only the 11 largest in DE – covering 90% of the advertising market)



YOUTUBE'S POSITION IN EACH MARKET

	You Tube brand			You Tube homepage		
	Web user	18 - 49	16 - 34	Web user	18 - 49	16 - 34
	47%	50%	51%	24%	28%	31%
	45%	48%	53%	27%	32%	41%
	44%	49%	58%	28%	33%	46%

Monthly Reach, December 2010. Home usage only.

Source: Nielsen Netview (UK+DE), Médiamétrie Netratings (FR)

