DATA FUSION

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The Background

Since 1988, Ipsos is the leading research company in the MENA that offers holistic research and audience measurement solutions in order to serve different businesses in the region. Being the currency endorsed by all market players requires from us two major things which are to educate and to respond. We feel that we have obligation towards our clients and the whole industry to bring up new tools, approaches and learning in addition to responding to their needs through new tailor made models.

Key Drivers

In order to reach their targets, marketers and media specialists use the international standard analysis method by measuring different media platforms consumption across diverse consumer segments. Ipsos has tons of data on the shelves which form a rigid cornerstone for a new service that touch bases on those marketers and media specialists deeper needs in addition to creating an edge versus all competitors appearing here and there every now and then.

All this has lead us to endorse a new service, Data Fusion, which is a process of integrating the data collected from different syndicated media measurement studies across consumers that have similar demographic profiles, media behaviors, attitudes and lifestyles.

Methodology in Brief

This exercise is inclusive of all syndicated offerings like TV, Radio, Print, Online, ICT and consumer habits study released on monthly basis with a final sample of 6,000 respondents in the Saudi market. It is very essential as a first step to decide on the Donor and receivers Data Marts. Defining which Repositories will be the donor and which other will be the receiver in such an effort. It was statistically decided that TLM will serve as the receiver data mart while NRS, Radiometry and others are candidates of being donors for marriage to take place throughout the process.

Fusion can only be done by deciding on the mandatory variables and the bridging variables, both elements serve as a building block to fuse respondents or any type of information from one data mart to another.

Mandatory: Such variables should exist in both files with strong equal distribution; variables of such types should have exactly the same people in both datasets. In other words, the respondents or objects to be fused based on the mandatory variables should be 100% similar without any exception.

Bridging: such variables have similar characteristic as the Mandatory but with one exception which is they don’t impose 100% matching rate between the data marts in the fusion. The difference between the mandatory and the bridging is that the mandatory imposes 100% similarity and makes the fusion very solid on the essential elements such as the gender, nationality, etc… however the bridging variables compliment the mandatory constraints and link the objects / Respondents from one dataset to another

Mandatory Variables	Bridging Variables
Gender	Education
Age Groups	Occupation
Nationality	Social Class
Frequency of exposure to media	Region
Recency of exposure to media	Household Family Income

Confidence Level

Fusion is mainly based on the level of similarity between the fused studies which mainly relies on Mandatory variables selected. In this case, and since Media habits are taken as mandatory, the level of similarity is very high.

Several tests have been made comparing media results of each study pre and post the Fusion process. We may say that the confidence level is 90% plus.

Communication

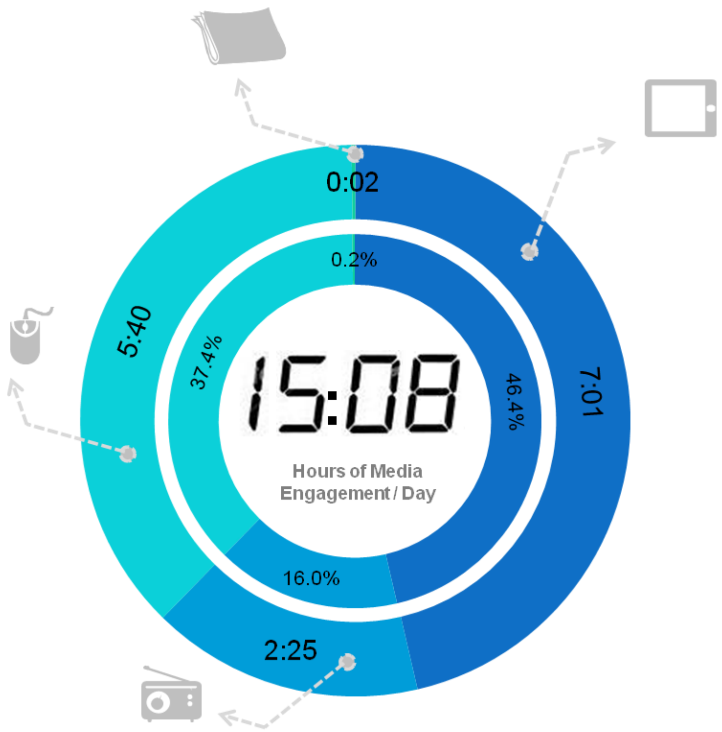
During the preparation phase, huge efforts have been exerted on communicating this service with key market players to ensure some accounts upon release. Big wins have been recorded and we are highly optimistic to see other market players jumping onboard.

Key Benefits

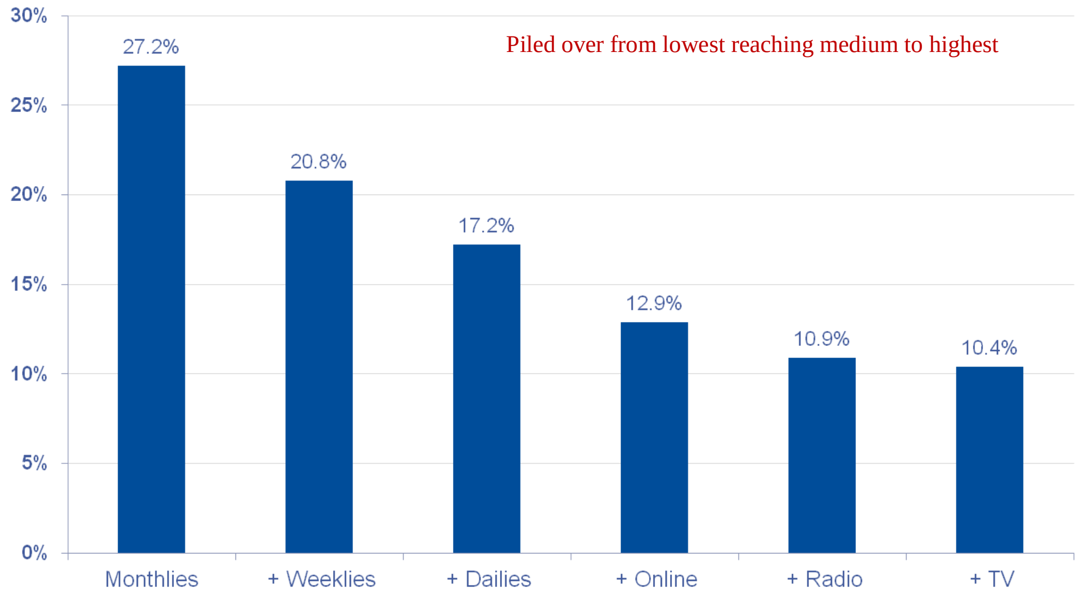
With Data Fusion, we can now have information about multiplatform usage, are we still in the sentimental era of holding a newspaper, or have we reached the screen based era. Is TV maintaining its position or is it losing it. How much does groups with multiplatform really worth in the market reach wise. Bottom line, the market now has the luxury working on a new variable which is the unduplicated reach.

Looking up some numbers and examples

1. Media Engagement: Media is highly consumed by adults in KSA as it constitutes more than 15 hrs of their day. The majority of this media engagement is screen based. People almost spend 7 hrs watching TV and more than 5 hrs online. Almost two and a half hours are spent on radio

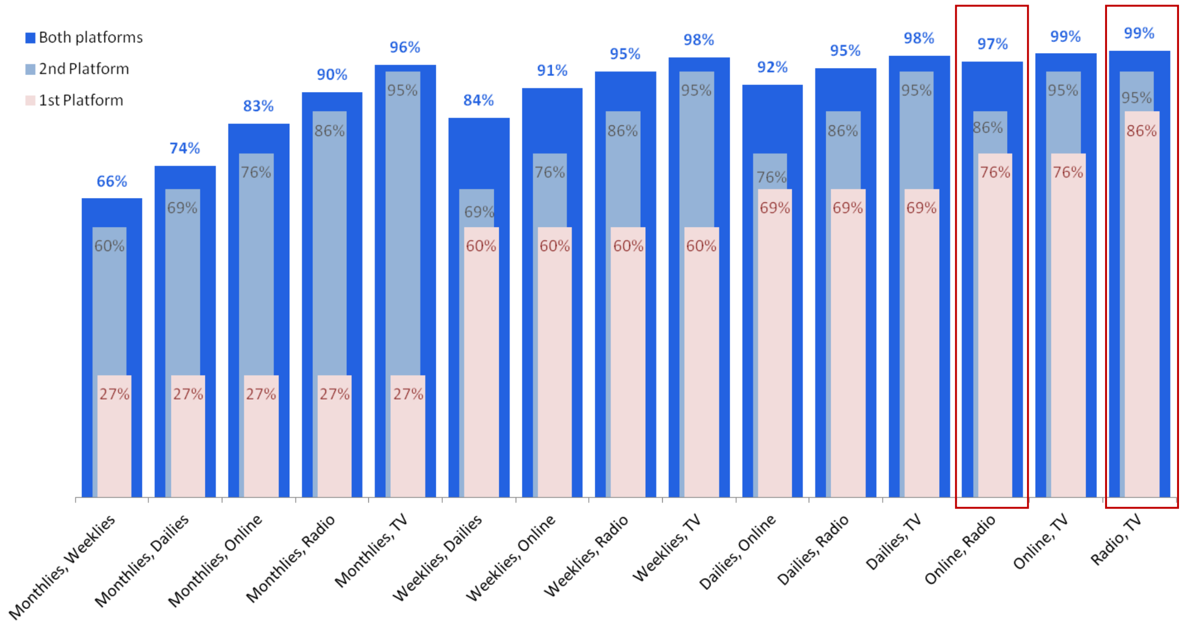


2. Medialists: it is now possible to determine those people who are very attached to media. In KSA, 10% of the population has used the 6 media platforms in the last month (TV, Radio, Online, Newspapers, Weeklies & Monthlies). Those people profile is mainly skewed towards being youngsters between 15 & 24 years old (42% of the population indexing 138% vs. total population split) and those living in Western province (48% of the population indexing 141%)

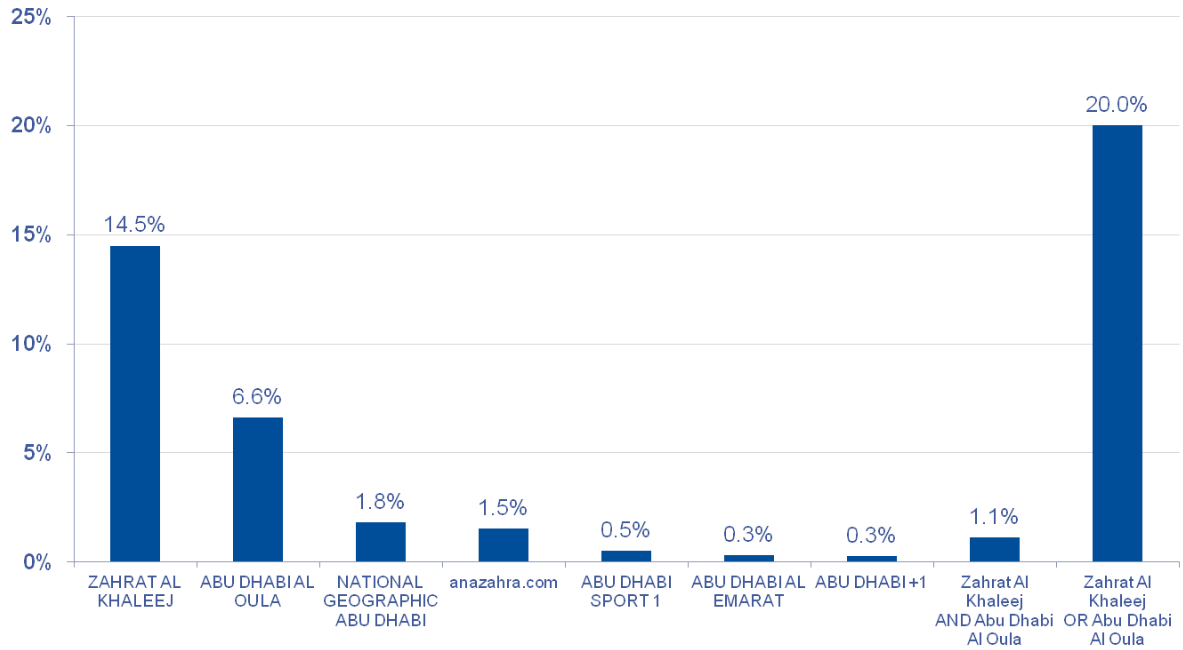


3. Incremental Reach: This has always been an area hard to cover. This will entitle a lot of additional analysis:

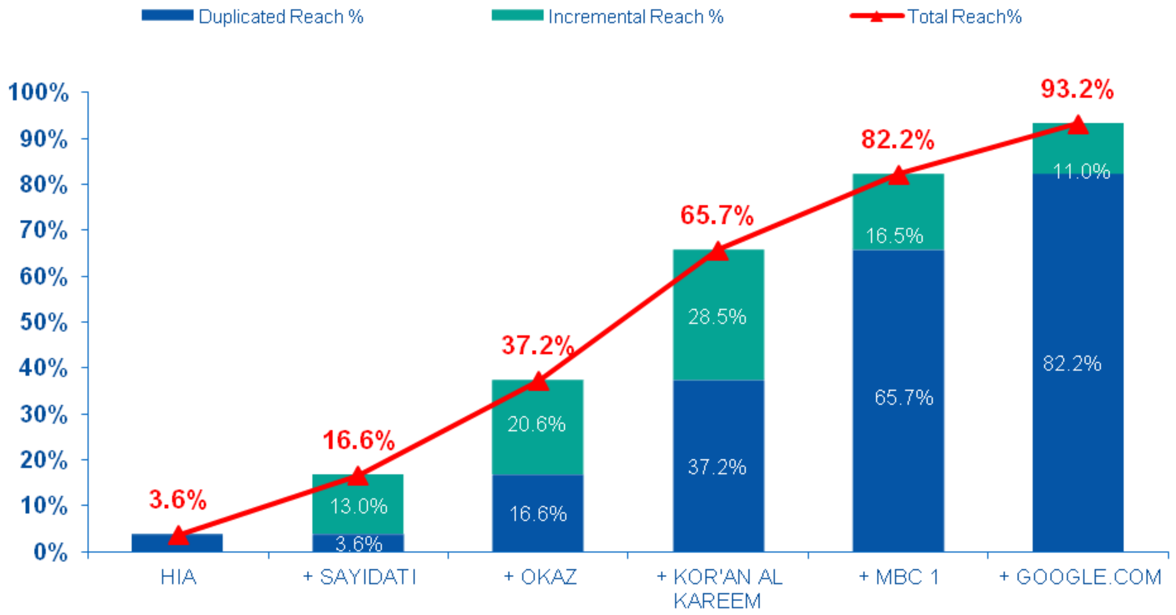
   a. Now it is feasible to understand what additional benefit one medium can add to another. While TV and radio combination can reach 99% of the population, another less expensive combination is available which is Radio and Online which can reach 98% of the population.



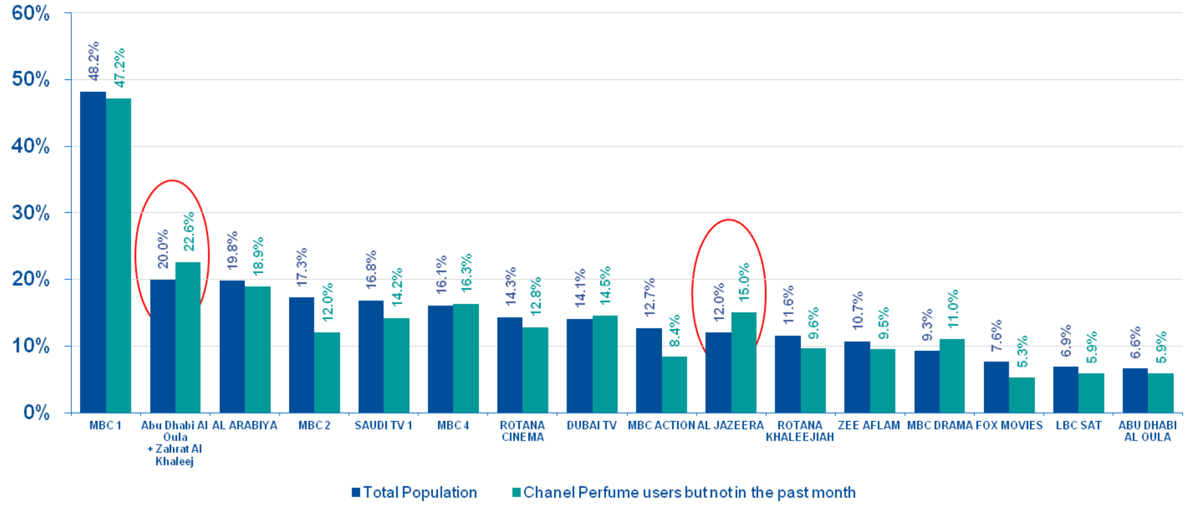
b. Media Houses with multiplatform media can now evaluate their market coverage, understand their cross promotions power and build up selling schemes for planners. Abu Dhabi Media whose top medium in KSA (by Reach) is Zahrat Al Khaleej with 14.5% has a total group reach of 23.5%. It was worth noting also that there is a very minimal duplication between its top two media which resulted in its wide spread across the market.



c. Planners now can optimize for high reach with lower budgets through having the ability to access this kind of data. Aiming at a reach higher than 60% could be done without the need of MBC 1 (top TV in KSA making it most expensive) and Google (which is not the aim of small brands). Advertisers, with low budget, can be heard now in the market



4. Brands: The power of the exercise is also beyond media. Planners should not worry anymore to plan based on demographic targets. The introduction of Brandpuls and including it in the Fusion would change the whole market strategy. Planners can now directly hit and communicate their brand users like Chanel perfumes or psychographic segments like conservatives. When Zahrat al Khaleej Magazine and Abu Dhabi Al Oula are available to reach 20% of the population, they can reach 23% of Chanel users who quit last month, making them a favored method of communicating the correct message for Chanel to retain those consumers



Way Forward

We may all agree that this is an exercise done, and not a methodology endorsed. Our Fusion exercise is not a permanent exercise to be carried on. We are preparing the market to the idea of using multi-platform data, until a time comes and we build our super panel where real panelists will be taking part in each and every study mentioned above through the MediaCell technology and its ability allow online surveying besides its passive data collection for both Radio and TV

Thank you.