



Market research

Mediaplanning

Consulting

...MyCrossmedia provides a wide range of services in B-to-B media marketing: Monitoring of domestic TV markets in CEE, office-tools for the media business, planning of pan-European cross media campaigns - and finally in deep analysis of international media markets...

practice and intelligence – global, regional

# Inhalt

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Businessmodel

Services

Market- and media research

Marketing consulting

Crossmedia planning

Sales-support

Biography

# Businessmodel

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Service	Services and consulting in B-to-B media marketing
Clients	Media agencies, media sales houses without research department, entrepreneurs without media agency
Market	Full time employed media analysts and planning staff generate high costs - outsourcing of projects to a specialized agency gives flexibility
Benefits	Fast services with controlled costs. First steps for entering markets without long term agencies contract
USP	2 decades of experience in the job, know how and high reputation in the market plus excellent contacts to major media houses

# Services

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Market- and media research

International market- and media research, focused on CEE, Asia including target group analysis

Marketing consulting

Business models in media marketing, TV-on air Promotion, competitors monitoring in the media markets

Crossmedia planning

Crossmedia planning for German and European advertising markets

Sales-support

Media-management systems, sales management, tools for media planning, company presentations

Market- and media research

# Market- and media research

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## **Clients and targets:**

Analysis papers of international media markets for advertisers and media houses to support decision processes.

## **Contents:**

All necessary major aspects: status quo of the political system and the media laws, macro economic perspectives, competitors und major players in the advertising market, growth perspectives of the medias in the advertising share, CPTs, focus on TV and Internet, target group analysis.

## **Method:**

Analysis of most recent research data (provided by the client or via data mining, f.e. Nielsen, TNS, GfK, eMarketer, Screendigest, Gemius, WARC, ZenithOptimedia); annual reports of major media houses in the market f.e. CME, MTG, RTL Group, SBS; market studies of industry associations, f.e. IABs; breaking news of local newswires; governmental statistics- and Telecom-offices and well reputed NGO'S.

# Market- and media research

## Eastern Europe:

In international perspective, focus on Romania, Czech Republic, Slovakia, Poland and Russia

**Asia:** In international perspective, focus on China, Pakistan und South East Asia.

Eastern Europe

Media- and marketing dossier Eastern Europe

Poland	Belarus	Macedonia	Kosovo	Moldova	back
Czech Republic	Lithuania	Montenegro	Albania	Uzbekistan	
Slovakia	Latvia	Serbia	Turkey	Azerbaijan	
Romania	Estonia	Croatia	Armenia		
Hungary	Russia	Slovenia	Georgia		
Bulgaria	Ukraine	Bosnia-Herzegovina	Kazakhstan		



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Country Profile Asia

Media- and marketing dossier Asia

back

China	Japan	India
Hong Kong	South Korea	Pakistan
Macau	South East Asia	
Taiwan		



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**Africa:** In international perspective, focus on South Africa

Country Profile Africa

Media- and marketing dossier Africa

back

North Africa
West Africa
Central Africa
East Africa
Southern Africa



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# Market- and media research

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## The dossiers:

Market and media portraits in structured country profiles with detailed chapters, contents and executive summary.

Dossiers are provided as pdf in English. All tables and charts are Excel data easily adaptable for client's purposes.

### Media- and marketing dossier Slovakia

<a href="#">Advertising market</a>	<a href="#">General country data</a>	<a href="#">back</a>
<a href="#">Internet market</a>	<a href="#">Target groups</a>	
<a href="#">Mobile market</a>	<a href="#">Markets</a>	
<a href="#">Television market</a>	<a href="#">Executive summary</a>	
<a href="#">Print market</a>	<a href="#">Dictionary</a>	
<a href="#">Radio market</a>		
<a href="#">Outdoor market</a>		
<a href="#">Cinema market</a>		
<a href="#">Direct marketing</a>		



# Market- and media research: Case study Slovakia

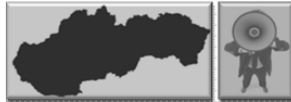
## The advertising market in Slovakia

### The advertising market in Slovakia

#### Media policies and legal framework

The media landscape in Slovakia has undergone dramatic changes in the last 20 years. After years of severe censorship and strict control by the Communist Party leadership, there was explosive development after November 1989. Soon after the fall of Communism, the floodgates opened, resulting in the creation of a variety of media. The media market in Slovakia is characterized by three factors: 1. A high concentration of media due to the relatively small size of the country. 2. The state still holds a large stake in the electronic media, which hinders competition. 3. Several networks, based on under ownership and personal issues. Since 2000, a concentration in electronic media has been forbidden by law. This rule has, however, only been paid lip service in the past few years. In 2008, the old media law from 1996 is replaced by a new law. This requires information about publishers and owners, as well as about possible shares in other media, to be made public. This represents an improvement compared to the old law, which demanded no information about ownership structures. The new media law forces newspapers to publish responses from people mentioned in their articles, without journalists having the chance to prove the accuracy of the articles.

#### Advertising market



Slovakia



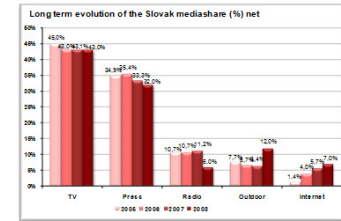
No.1\_February 22<sup>nd</sup>, 2010



Long term evolution of the Slovak mediashare (% net)

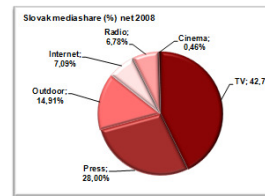
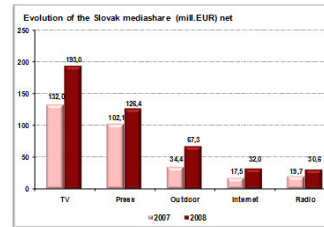
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
TV	48.2%	47.0%	47.2%	48.2%	46.2%	45.9%	45.9%	45.1%	45.1%	45.1%	45.1%	45.1%	45.1%	45.1%	45.1%	45.1%	45.1%
Press	34.7%	32.0%	34.2%	31.8%	34.9%	34.4%	32.3%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%
Radio	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%	7.1%
Outdoor	8.1%	8.1%	8.1%	8.1%	7.7%	8.7%	8.4%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
Internet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cinema	n.a.	n.a.	n.a.	n.a.	0.5%	0.5%	0.5%	0.5%	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: TNS-B. Slovakia; Slovak University of Agriculture



No.1\_February 22<sup>nd</sup>, 2010


## The advertising market in Slovakia



Source: TNS-B. WARC 2009

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# Market- and media research: Case study Pakistan



Television market  
Pakistan

Television Market Pakistan

“...The last few years have been very active and promising for the

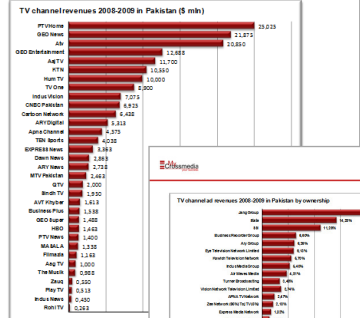
Television Market Pakistan

**TV channel net revenues in Pakistan**

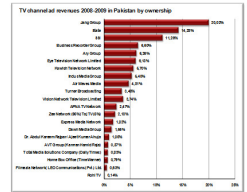
All research data has consistently shown the advertising revenue, the number of channels, the size of audience, the variety and consistency of media content in Pakistan has in fact progressed and developed. Various source estimates the so share of satellite channels vs terrestrial channels 70:30 to 25%

Channel	Owner	Type	Revenue (\$ mil)	Revenue (€ mil)	Share (%)
PTV News	Corporate	News	2,272	25,025	13.5%
Geo News	News	News	1,776	20,000	10.0%
Geo TV	Corporate	General	1,673	18,814	9.3%
PTV World	Corporate	General	1,215	13,695	6.5%
PTV 7	Corporate	General	1,176	13,174	6.3%
PTV 9	Corporate	General	1,176	13,174	6.3%
PTV 10	Corporate	General	1,176	13,174	6.3%
PTV 11	Corporate	General	1,176	13,174	6.3%
PTV 12	Corporate	General	1,176	13,174	6.3%
PTV 13	Corporate	General	1,176	13,174	6.3%
PTV 14	Corporate	General	1,176	13,174	6.3%
PTV 15	Corporate	General	1,176	13,174	6.3%
PTV 16	Corporate	General	1,176	13,174	6.3%
PTV 17	Corporate	General	1,176	13,174	6.3%
PTV 18	Corporate	General	1,176	13,174	6.3%
PTV 19	Corporate	General	1,176	13,174	6.3%
PTV 20	Corporate	General	1,176	13,174	6.3%
PTV 21	Corporate	General	1,176	13,174	6.3%
PTV 22	Corporate	General	1,176	13,174	6.3%
PTV 23	Corporate	General	1,176	13,174	6.3%
PTV 24	Corporate	General	1,176	13,174	6.3%
PTV 25	Corporate	General	1,176	13,174	6.3%
PTV 26	Corporate	General	1,176	13,174	6.3%
PTV 27	Corporate	General	1,176	13,174	6.3%
PTV 28	Corporate	General	1,176	13,174	6.3%
PTV 29	Corporate	General	1,176	13,174	6.3%
PTV 30	Corporate	General	1,176	13,174	6.3%
PTV 31	Corporate	General	1,176	13,174	6.3%
PTV 32	Corporate	General	1,176	13,174	6.3%
PTV 33	Corporate	General	1,176	13,174	6.3%
PTV 34	Corporate	General	1,176	13,174	6.3%
PTV 35	Corporate	General	1,176	13,174	6.3%
PTV 36	Corporate	General	1,176	13,174	6.3%
PTV 37	Corporate	General	1,176	13,174	6.3%
PTV 38	Corporate	General	1,176	13,174	6.3%
PTV 39	Corporate	General	1,176	13,174	6.3%
PTV 40	Corporate	General	1,176	13,174	6.3%
PTV 41	Corporate	General	1,176	13,174	6.3%
PTV 42	Corporate	General	1,176	13,174	6.3%
PTV 43	Corporate	General	1,176	13,174	6.3%
PTV 44	Corporate	General	1,176	13,174	6.3%
PTV 45	Corporate	General	1,176	13,174	6.3%
PTV 46	Corporate	General	1,176	13,174	6.3%
PTV 47	Corporate	General	1,176	13,174	6.3%
PTV 48	Corporate	General	1,176	13,174	6.3%
PTV 49	Corporate	General	1,176	13,174	6.3%
PTV 50	Corporate	General	1,176	13,174	6.3%

**TV channel revenues 2008-2009 in Pakistan (\$ mil)**



**TV channel net revenues 2008-2009 in Pakistan by ownership**



**Major Players in the TV market of Pakistan**

**State of Pakistan**

With 44% of the total share the public interest of the PTV group was a dominant strong part in the high market of national television bringing government a strong influence.

**Jang Group**

The members of the Jang Group are the strongest private TV group in Pakistan which around 20% of the market. They are active in various TV channels and are also active in the media market and are also active in the print market. The Jang Group also has a strong presence in the print market and is also active in the print market.

**Business Recorder Group**

With 10% of the total share the Business Recorder Group is a strong player in the market. They are active in various TV channels and are also active in the media market and are also active in the print market.

**Any Group**

The members of the Any Group are the strongest private TV group in Pakistan which around 20% of the market. They are active in various TV channels and are also active in the media market and are also active in the print market.

Television Market Pakistan

20<sup>th</sup> June 2010

20<sup>th</sup> June 2010

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# Market- and media research: Case study South Africa

Online market



South Africa



Online market South Africa No. 1

**“...Africa - the continent of opportunity...”**

Sir Martin Sorrell, WPP

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Online usage among South Africa's media

Use of many online channels such as e-mail and the Web is increasing. In South Africa, outdoor is also very common due to the fact that a large proportion of the people live in urban surroundings.

Percentage of the population of SA with media contact in 2007



Media Type	Percentage
Any Radio	85.4
Any Outdoor	82.2
Any TV	83.4
Any Newspaper	68.3
Any Magazine	58.2
Internet	5.1
Games	5.1

Along with social media, education and economic situation the white consumers refer more to TV. As the black refer more to radio. This is very strong with newspapers and magazines.

TV usage in South Africa compared



Country	TV Usage (%)
USA	86.7%
UK	82.0%
France	81.0%
Germany	80.0%
Spain	78.0%
Italy	75.0%
Japan	70.0%
China	65.0%
India	60.0%

■ No. of hours watched per week  
■ TV: Average hour's viewership week  
■ Reported Average hours: based on 48 weeks

Online market South Africa No. 1

The young target groups in South Africa

Young South Africans are the heaviest users of electronic devices such as mobile and PDA's. They are not, however, the biggest users of the Internet, placing third behind the 20-24 and 25-29 age groups. Just over 18 percent of weekly internet users are aged 18 to 24, giving this medium an 8 percent reach into this age group.

e-commerce in South Africa

Overall the internet usage in South Africa achieved the highest value when compared to other countries in the world. The internet usage in South Africa is still low, however, due to the relatively high cost of internet access. The internet usage in South Africa is still low, however, due to the relatively high cost of internet access. The internet usage in South Africa is still low, however, due to the relatively high cost of internet access.

No.1 7<sup>th</sup> July 2010
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# Market- and media research: Case study Vietnam

Television market Vietnam

No.2\_8<sup>th</sup> September 2010

**Television Market Vietnam**

"... 80 million people, more than 20 million households, a scattered population (70% of which lives in rural areas), low pay-TV penetration, a growing middle class, high personal income growth potential, a significant sign of economic recovery"

Jean-Noël Tronc, Chairman of Canal Overseas

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**Television Market Vietnam**

**Time spent per day (minutes) in Vietnam**

**Viewership behavior in the TV of Vietnam**

On the average, TV makes most households in the evening with a peak

**Media consumption dynamics within a day in Vietnam**

**Television Market Vietnam**

**Examples of IPTV**

www.canaloverseas.net

http://www.vietnam.vtc.vn (the service of the VTC network)

**Mobile TV in Vietnam**

About 50 million mobile subscribers in Vietnam are regular mobile users. They know a regular setting "reach" in the industry's terminology. With the poorest customer base, 3G operators have the least well set up to attract a few million subscribers to their 3G services in the next few years. Mobile TV is seeing rising hopes with the launch of these 3G services.

Vietnam has been experimenting with mobile TV since early 2007 with CDMA-based service provided by 3G mobile and DVB-H service provided by VTC. However, both services remain basic to attract enough subscribers for different reasons. For 3-Phone, its core mobile phone service has not been going well, and has only 10% of the mobile revenue market, while the Big Three (Vietel, Vinaphone and Mobiphone) are the real strong businesses. On the other hand, VTC is mobile broadcasting a sub-percent of the mobile phone service but relies heavily on propagation of DVB-H bandwidth demand in Vietnam that are mainly scarce and expensive for most users.

3G video is providing opportunities for new mobile business models, however. As major mobile service carriers roll out their 3G plans (Vietphone in October, Viettel and Mobiphone in December, DTH in April 2010), VTC is working on providing the content for these services. Its service strategy for IPTV owners programming content to broadcast service with broadcast connection (satellite or DVB) remains.

As it launched the first 3G service in Vietnam on October 12, Vinaphone said it would adopt a three-prong strategy, and was confident that most of its existing 12 million GPRS users would upgrade to 3G.

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**Television Market Vietnam**

**Executive summary on the TV market of Vietnam**

- High growth rates of the economy. One of the youngest populations in Asia. Rapid urbanization with emerging middle class and fast growing personal income - but most people still live in rural areas. Ideal for TV, cable TV and satellite are fast growing.
- Government tries to open the media market while trying to keep control of it, i.e. Pay-TV is on the start with TV being first project of state and private sector (Canal Plus, France). Government forces digitalization of TV, internet and satellite TV by activities of VTC.
- TV is still the leading medium followed by a rapid growing internet consumption especially of young and urban users. Vietnam is one of the biggest TV viewing in Asia. Ad market and TV market are dynamic that they grew despite the crisis. However the rebound granted by the ad industry got bigger. It is predicted that prices of TV spots (low about 2,000 euros in PT) are no growth. TV advertising is sold first, state channel, VTV authorized spots for 2011 to ADP, sports marketing, especially football, play in sports world, marketing rights in 2011 went from VTV to VTC channels to TV.
- Strong governmental TV (state) TV channels but also strong local TV channels due to the difference in mentality and media consumption between north and south, for example the north is more open to foreign media, especially from China. Next to VTV is HTV from the southern metropolis Ho Chi Minh City the strong player.
- Audience measurement was recently optimized by TNS, to expect change in the data, however TNS does not yet measure commercial break ratings in pay TV channels. News, movies, music and sport are the major genres watched, kids and teen programs are still low.
- VTC is well equipped and state-of-the-art regarding HDTV and converging digital media (mobile, internet, IPTV, games). VTC also expands abroad (Cambodia, South Korea, USA).

Marketing consulting

# Marketing consulting

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## **Focus:**

Main focus on marketing of TV-niche channels, f.e. in Germany and CEE

## **Service:**

Focus on analysis of the German TV-market / competitors monitoring; analysis of regional TV-markets, f.e. Bavaria.

## **Dossiers:**

Analysis of the competition between TV and internet. Hot trends f.e. Digital Video Commercials or TV-convergence in Europe.

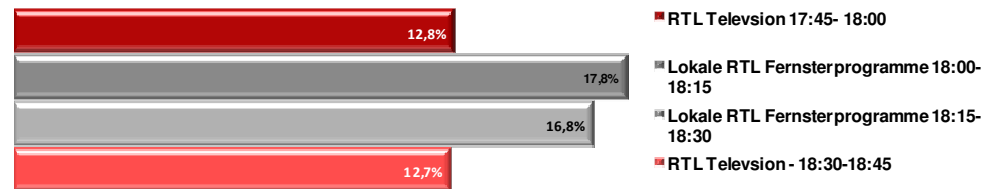
# Marketing consulting: competitors monitoring

Analysis of TV-niche channel sales strategies and regional TV-markets

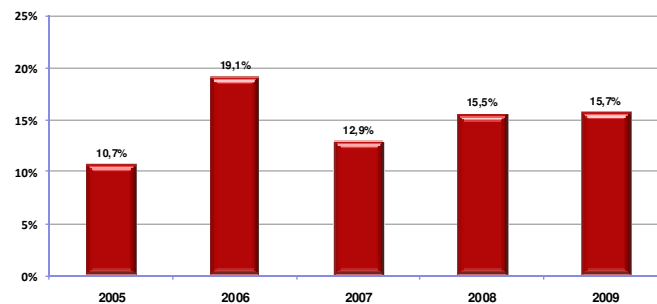
Channel	06:09	09:13	13:17	17:20	20:23	23:01	01:02	02:06	Status
13 th STREET	90 €	90 €	90 €	420 €	600 €	360 €	360 €	90 €	2009
bio.	30 €	30 €	30 €	120 €	180 €	120 €	120 €	30 €	2009
Bloomberg TV	180 €	330 €	390 €	480 €	480 €	-	-	-	2007
Discovery Channel	-	180 €	240 €	360 €	450 €	270 €	-	-	2009
Discovery Geschichte	-	180 €	210 €	240 €	360 €	270 €	-	-	2009
Animal Planet	-	60 €	90 €	90 €	120 €	120 €	-	-	2009
Focus Gesundheit	90 €	120 €	210 €	240 €	450 €	270 €	90 €	90 €	2009
Passion	90 €	90 €	90 €	150 €	400 €	150 €	-	-	2009
RTL Crime	90 €	150 €	-	-	-	-	-	-	-
RTL Living	90 €	150 €	-	-	-	-	-	-	-
Kabel Eins Classics	-	50 €	-	-	-	-	-	-	-
Sat.1 Comedy	-	50 €	-	-	-	-	-	-	-
SciFi	90 €	90 €	-	-	-	-	-	-	-
terranova	180 €	210 €	-	-	-	-	-	-	-
History	30 €	30 €	-	-	-	-	-	-	-

Sources: channel pricelists, 30 Seconds spots

Audience flow zwischen RTL u. Fensterprogrammen Mo - Fri 17:45 - 18:45 ZG E14+ in 2008



Marktanteile Sat.1 Fensterprogramme Mo - Fri 17:30 - 18:00 ZG E14-49



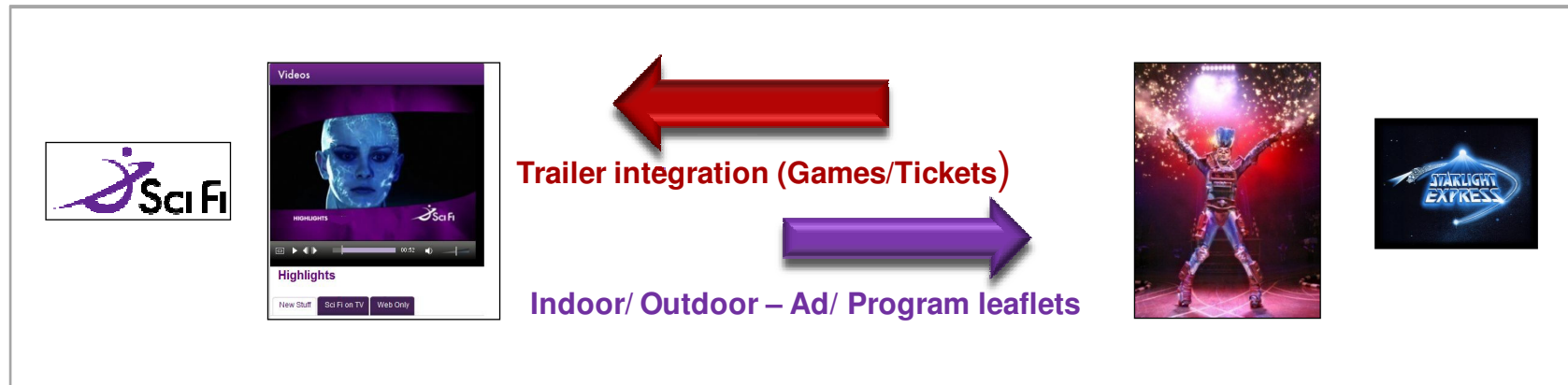


# Marketing consulting: Product development

Tailor made products for sales f.e. cooperations and bartering-deals across medias f.e. TV and events

TV channel

Musical



# Marketing consulting: Innovations monitoring

Dossiers monitoring TV and Internet convergence: hot trends, f.e. Digital Video Commercials or TV-convergence in Europe

Internet Advertising Formats – Digital Video Commercials No. 2

Internet Advertising Formats

Digital Video Commercials

**"I would say any retailer that is unable to, on a product level, drive conversion rates up at least 25% through the use of video, is not implementing video effectively."**  
Justin Forster, President Video Commerce Consortium, May 2010

Internet Advertising Formats – Digital Video Commercials No. 2

**Recall of Digital video commercials compared to TV ads**

in a recent Nielsen study, digital video commercials on computers did compare to TV spots achieved higher brand awareness, better message association and higher purchase intent.

Category	Online video commercials	TV ads
General recall	68	54
Brand recall	68	38
Message recall	58	31
Likeability	28	14

When recipients were exposed to TV ads after they were exposed to online ads their recall was also higher level of interest for the TV ads.

**Recall of Online video commercials + TV Ads**

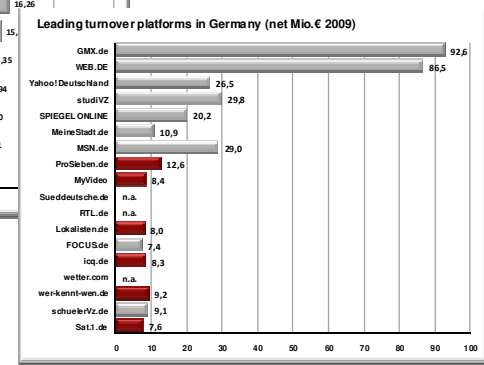
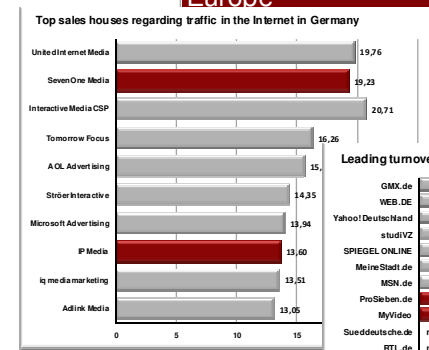
Category	TV + Online video commercials	TV only
TV Ad General recall	82	64
TV Ad Brand recall	78	48
TV Ad Message recall	68	39
TV Ad Likeability	37	19

No. 2\_25<sup>th</sup> May 2010

**TV Convergence**

Europe

My Crossmedia  
your success



## Crossmedia planning

# Crossmedia planning: Strategies

Strategies of pan-European media campaigns in all medias; use of systematically collected data in campaign archives. Evaluation of key data of planned campaigns, media-mix, strategy and target group analysis.

Kampagne:	Branche:	Zeitraum von:	WKS:	Zielgruppe:	Merkmale:	Budget:	TV:	Print:	Online:	Radio:	OoH:	PoS:	Messe/Events:	CRM/Direct-mailing:	Werbemittel:							
xxxx	Bonussysteme	01.09.06 31.08.07	52	E 20 49		20.020.000 €	73%	8%	3%		16%											
xxxx	Bonussysteme	01.09.06 31.08.07	52	HHF 20 59		20.000.000 €	61%	14%	11%		12%	1%										
xxxx	Bonussysteme	01.09.06 31.08.07	52			20.264.921 €	55%	22%	12%		9%	2%										
xxxx	Bonussysteme	01.09.06 31.08.07	52	E 14 99		20.020.250 €	54%	19%	3%	5%	10%											
xxxx	Bonussysteme	01.09																				
xxxx	Bonussysteme	01.09																				
xxxx	Finanzdienstleistung	15.08																				
xxxx	Finanzdienstleistung	05.01																				
xxxx	Finanzdienstleistung	01.10																				
xxxx	Medien	01.01																				
xxxx	Medien	01.01																				
			Sender:	Sek:	Form:	Zeitraum von:	WKS:	Budget:	Zielgruppe:	Merkmale:	ZG in Mio.	Zielschiene	Frequenz	Slot Verteilung:	KONTAKTE in Mio.	NETTO RW in Mio.	NETTO RW in %	Ø Kontakte	GRP	TKP	CpG	Aff.
			DSF		30 Spot	01.03.06 31.05.06	13	290.000 €	M 40 65	HHNE >1.750-	8,28	9	1	138	5,07	1,89	22,8	2,7	61,2	57,27 €	4,740.00 €	
			DSF		30 Spot	01.03.06 31.05.06	13	290.000 €	M 40 65	HHNE >1.750-	8,28	9	1	128	5,53	1,87	22,6	3	66,8	52,47 €	4,340.00 €	
			DSF		20 Spot	15.03.05 30.04.05	6	200.000 €	K 6 14		6,88	9	22	224	1,96	0,62	9	3,2	28,5	102,20 €	7,020.00 €	
			DSF		20 Spot	15.03.05 30.04.05	6	200.000 €	HHF M 18 49		3,7	9	1	272	5,18	1,15	31,2	4,5	140	67,73 €	2,500.00 €	
			Kabel 1		20 Spot	02.05.05 05.06.05	4	80.000 €	F 30 54		13,87	6	23	40	4,03	2,55	18,4	1,6	29	19,82 €	2,748.00 €	123
			Pro7		20 Spot	02.05.05 05.06.05	4	131.000 €	F 30 54		13,87	6	23	27	4,44	2,97	20,7	1,5	32	29,73 €	4,122.00 €	123
			Kabel 1		15 Spot	06.09.03 16.09.03	1,5	100.000 €	E 14 49		35,75	9	1	64	14,8	7	20	2,1	42	6,77 €	2,351.00 €	102
			Kabel 1		20 Spot	04.09.03 14.09.03	2	132.000 €	M 30 50		14,997	6	1	71	7,1	3,4	29,6	2,1	61	18,55 €	2,157.00 €	126
			Kabel 1		20 Spot	08.08.03 15.08.03	1	55.000 €	M 35 50		14,997	6	1	38	3,3	2	21,5	1,7	35	16,72 €	1,561.00 €	131
			N24		30 Trailer	24.05.05 05.06.05	2	97.500 €	M 20 49		15,31	17	0	126	1,94	0,91	5,9	2,1	13	39,18 €	5,997.00 €	112
			Sat.1		20 Spot	01.07.03 30.07.03	4	168.000 €	M 20 49		15	17	0	31	5,7	3,7	24,6	1,5	38	29,50 €	4,422.00 €	101
			Sat.1		25 Spot	01.07.03 30.07.03	4	200.000 €	E 14 49		35,75	6	23	61	24	11	31,5	2,2	70	8,30 €	2,884.00 €	99
			Pro7		20 Trailer	15.05.05 15.06.05	4	230.000 €	HHF 25 49		15,49	6	23	30	6,64	4,27	27,6	1,6	43	26,63 €	4,125.00 €	156
			Pro7		20 Spot	13.06.05 10.07.05	3	640.000 €	E 20 49	HHNE >2.000-	15,73	17	1	76	19,43	5,74	36,5	3,4	124	32,93 €	5,180.00 €	124
			Kabel 1		25 Spot	01.05.03 30.05.03	4	250.150 €	K 3		71	13	1	120	60	17,5	24,6	3,5	85	4,12 €	2,934.00 €	100
			Pro7		15 Trailer	21.03.05 10.04.05	3	149.500 €	HHF 14 49		16,7	6	20	25	6,832	3,653	21,9	1,9	41	16,97 €	2,893.00 €	169
			Pro7		20 Trailer	21.03.05 10.04.05	3	149.500 €	HHF 14 49		16,7	6	20	25	7,45	3,77	22,6	2	45	15,44 €	2,577.00 €	170
			Sat.1		20 Spot	02.05.05 05.06.05	4	317.000 €	F 30 54		13,87	6	23	67	15,1	5,54	40	2,7	109	21,04 €	2,918.00 €	123
			Pro7		20 Spot	01.02.05 28.02.05	4	500.000 €	E 14 49		35,75	9	1	63	48,32	17,3	48,4	2,8	135	10,36 €	3,705.00 €	134
			Pro7		20 Spot	01.02.05 28.02.05	4	500.000 €	E 14 49		35,75	9	1	89	57,33	16,78	46,9	3,4	160	8,73 €	3,123.00 €	136
			Pro7		30 Spot	01.08.03 31.08.03	4	500.000 €	E 14 49		35,75	6	1	58	37,3	14,7	42,5	2,5	107	13,41 €	4,657.00 €	135
			Pro7		25 Trailer	01.05.05 15.06.05	6	500.000 €	E 18 29		9,16	9	23	52	7,89	3,24	35,4	2,4	86	48,73 €	4,462.00 €	155
			Pro7		25 Trailer	01.05.05 15.06.05	6	1.000.000 €	E 18 29		9,16	9	1	123	16,94	4,57	49,9	3,7	184	45,66 €	4,181.00 €	128
			Pro7		25 Trailer	01.05.05 15.06.05	6	1.000.000 €	E 14 25		9,99	9	1	123	17,04	4,83	48,3	3,5	171	45,14 €	4,510.00 €	134
			Sat.1		20 Spot	01.05.03 31.05.03	4	588.000 €	M 20 49		15	17	1	64	18,1	6,9	46,6	2,6	120,9	32,50 €	4,873.00 €	103
			Sat.1		30 Spot	01.06.03 04.07.03	4	677.700 €	E 14 99		14,997	6	1	107	154	27,6	43,8	5,5	244			100
			Pro7		30 Trailer	24.05.05 05.06.05	2	490.000 €	M 20 49		15,31	17	0	31	7,98	4,42	28,9	1,8	52	47,29 €	7,238.00 €	112
			Pro7		25 Spot	13.09.03 23.09.03	1,5	200.000 €	E 14 49		35,75	9	1	32	16	9	25,7	1,8	46	12,54 €	4,355.00 €	134
			Pro7		25 Spot	09.08.03 24.08.03	2	380.000 €	M 14 29		17,546	9	1	86	6,8	2,4	37	2,9	106	55,30 €	3,579.00 €	138
			Sat.1		30 Spot	01.06.03 04.07.03	4	677.700 €	E 14 49		35,75	6	1	107	80	16,3	46,8	4,9	230			107
			Pro7		20 Spot	24.07.03 04.08.03	1,5	160.000 €	E 20 35		14,997	6	1	45	6,2	3,7	28,5	1,7	47	25,78 €	3,380.00 €	151
			Pro7		20 Spot	04.03.03 19.03.03	2	422.000 €	E 14 49		35,75	17	0	34	24	11,7	33,8	2	69	17,64 €	6,021.00 €	141
			Pro7		25 Spot	01.04.03 17.04.03	2	261.000 €	F 25 39		14,997	6	1	22	3,28	2,15	29,3		44,8	93,72 €	5,835.00 €	175

# Crossmedia planning: Case study Tourism

Strategic planning and reporting of media campaigns with €double mn budgets

Documentation: TV, Print, Radio

- Spain\_TV
- Spain\_Newspapers
- Spain\_Magazines
- Netherlands\_TV
- Netherlands\_Newspapers
- Netherlands\_Magazines
- Italy\_Radio
- France\_TV
- France\_Newspapers
- France\_Magazines
- UK\_TV
- UK\_Newspapers
- UK\_Magazines

Weekly listener share in Sicily

Radio 24	160
Radio Montecarlo	344
RAIRADIO TRE	511
Radio Capital	529
R101	624
Kiss Kiss	665
Radio 105	682
Radio DEEJay	1,043
RAIRADIO DUE	1,063

Media split

Countries	TV share	Print share	CoH/Multim share	Online share	Radio share	Cinema share	TOTAL	Country Share	Print Inserts	Pis	TV spots
Italy	1,739,418 €	34,20%	798,597 €	5,70%	1,117,259 €	21,97%	446,900 €	8,79%	491,670 €	98,7%	491,590
Germany/A/CH	993,111 €	40,00%	496,556 €	20,00%	744,833 €	30,00%	248,278 €	10,00%	0 €	0,00%	0
France	1,252,000 €	60,87%	268,536 €	13,00%	402,210 €	19,55%	134,070 €	6,52%	0 €	0,00%	0
Russia	460,550 €	81,14%	94,039 €	12,40%	143,967 €	18,78%	49,656 €	8,59%	0 €	0,00%	0
UK	460,860 €	60,17%	106,410 €	13,89%	148,967 €	16,45%	49,556 €	6,48%	0 €	0,00%	0
The Netherlands	461,787 €	60,83%	98,710 €	13,00%	148,967 €	16,62%	49,656 €	6,54%	0 €	0,00%	0
TOTAL	5,367,727 €	44,54%	1,862,847 €	15,46%	2,822,202 €	23,42%	1,016,214 €	8,43%	491,670 €	4,08%	491,590

Media share

- TV: 44,54%
- Print: 15,46%
- CoH/Multim: 23,42%
- Online: 8,43%
- Radio: 6,54%
- Cinema: 4,08%

Country share

- Italy: 42,19%
- Germany/A/CH: 20,60%
- France: 17,07%

Spain Spots in spots

Slot	Number	Budget	Share
Morning	24	28.110 €	6,10%
Daytime	20	78.050 €	17,15%
Primetime	15	133.720 €	33,32%
Late Night	18	168.950 €	36,88%
TOTAL	78	460.860 €	100%

Channel share in spot numbers

Slot	Antena3	La Sexta	TELECINCO
Morning	6	11	7
Daytime	5	9	6
Primetime	5	6	4
Late Night	8	5	5
TOTAL	24	31	23

Channel share in total budget

Antena3	La Sexta	TELECINCO
36,36%	29,89%	33,75%

Channel share in spots in €

Slot	Antena3	La Sexta	TELECINCO
Morning	7.650 €	8.910 €	11.550 €
Daytime	35.400 €	24.000 €	24.000 €
Primetime	100.500 €	24.000 €	24.000 €
Late Night	24.000 €	24.000 €	24.000 €
TOTAL	167.550 €	76.910 €	82.550 €

Spain: TV channel share in total TV budget

- Antena3: 36,36%
- La Sexta: 29,89%
- TELECINCO: 33,75%

Spain: TV channel share in Primetime budget

- Antena3: 35,54%
- La Sexta: 24,67%
- TELECINCO: 39,79%

GRP in Slots

Slot	Antena3	La Sexta	TELECINCO
Morning	12,0	8,8	7,0
Daytime	15,0	13,5	16,2
Primetime	25,0	12,0	16,5
Late Night	24,0	5,0	9,0
TOTAL	76	39	49

CpGRP

Slot	Antena3	La Sexta	TELECINCO
Morning	63€	1.013€	1.650€
Daytime	2.360€	1.900€	1.111€
Primetime	4.020€	5.813€	1.500€
Late Night	1.000€	6.690€	6.818€
TOTAL	2.205€	3.505€	3.194€

Spain

Media	Content	Size	Sep 2010	Oct 2010	Jan 2011	Feb 2011	Mar 2011	Sep 2011	Oct 2011	Jan 2012	Feb 2012	Mar 2012	GRP in TG*
TV	diverse	30	0	4	4	0	0	0	0	0	0	0	184
Antena3	10:00 "Matina"	30	0	1	1	0	0	0	0	0	0	0	12,0
Antena3	18:00 "Sabre Mesa"	30	0	1	1	0	0	0	0	0	0	0	15,0
Antena3	20:30 "La Noche"	30	1	1	1	1	1	1	1	1	1	1	25,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	24,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	7,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	16,2
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	16,5
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	9,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	49
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	8,8
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	13,5
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	12,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	5,0
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	39
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	7,2
Antena3	20:30 "La Noche"	30	0	1	1	1	1	1	1	1	1	1	23

Sales-support

# Sales-support

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## **Workflow/ Inventory Tools:**

Tailor made Excel tools in Visual Basic or Apple script to solve workflow deficits and collect experience in the daily business before acquisitions of complex tools for analysis, reporting and management of sales activities.

## **Media planning tools:**

Consulting before acquisition of media planning software, initial training in software (print, TV, online, OOH).

## **Sales contact:**

Complete company presentations in Powerpoint; optimization of existing presentations.

# Sales-support: Workflow /Inventory tools

Tools for the complete workflow – planning to reporting.

Integrated workflow with Excel briefings and hyperlinks: Planning-> Booking ->Production

TV Media-Briefing

Betreuer:	Briefingdatum:	Typ:				
Kampagnenname:	Kundenname:	Kd. Nr.:	RSK/URK-Freigabe:			
Zielgruppe:	Alter:	Merkmale:	Status:			
Teilvolumina prüfen!		Startzeit:	Endzeit:			
Motiv/Flightname:	Sender:	Form:	Start:	Ende:	Länge:	Teilvolumen:
Budget-Slotverteilung: <input type="checkbox"/> ja      Umfelder: <input type="checkbox"/> ja      Gesamt 0 €						
Kampagnenziel:		Sonstiges:				
Werbedruck:						
Prime Time Anteil:						

Print Media-Briefing

Betreuer:	Briefingdatum:	Typ:			
Kampagnenname:	Kundenname:	Kd. Nr.:			
Zielgruppe:	Alter:	Merkmale:	Status:		
Gesamtvolumen:		Startzeit:	Endzeit:		
Motiv/Flightname:	Titel:	Format:	ET:	Anzahl:	Listenpreis:
Kampagnenziel:		Sonstiges:			
Werbedruck:					

TV Produktion

Auftrag datum:	Betreuer:	Kunde:	Kampagne:	Kiosk off On/Ur:	OMR:						
Länge:	Bender:	Verpackung:									
Projektitel:	Kommunikationsziel:	Kernaussage:	angelieferter Material:	Materialanforderungsm:	Textwünsche:	Bildwünsche:	Responsemöglichkeiten:	Onlineintegration:	Datum der Anlieferung:	Ansprechpartner:	
Projektablauf:	Produktion:	Freigabe Kunde:	Freigabe Sender:	Freigabe Kunde:	Freigabe Sender:	Freigabe Kunde:	Freigabe Sender:	Freigabe Kunde:	Freigabe Sender:	Freigabe Kunde:	Freigabe Sender:



# Sales-support: Workflow/ Inventorytools

Editing of TV-broadcast schedules by format changes from EDI-files into Excel

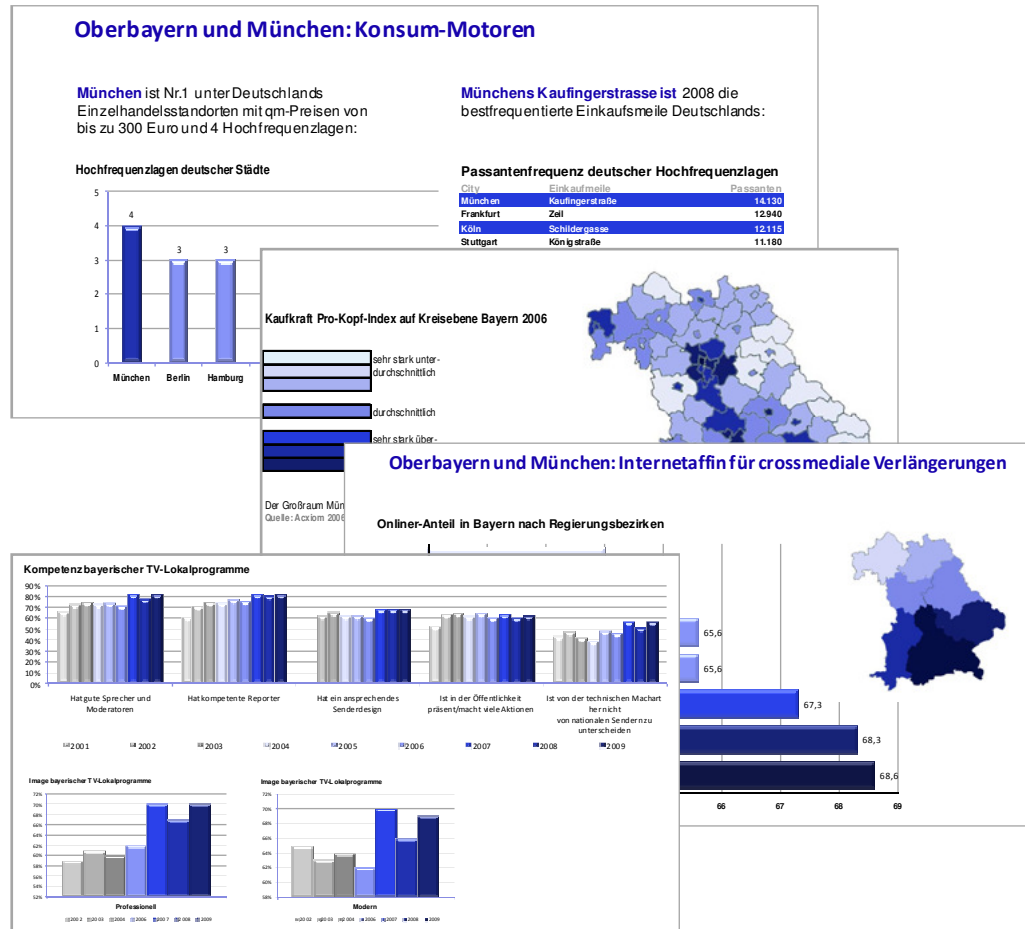
## Einschaltplan

Zeitraum: 01.07.2007 - 31.07.2007  
Währung: EUR  
Kunde:  
Ausgestellt am: 27.07.2009 11:35  
Produkt: :  
Länge: 30

Datum	Tag	WB	Startzeit	Motiv	Sek.	Umfeld	Preis
05.07.2009	Do	2010602	6:25		30		15,00 €
06.07.2009	Do	2020709	7:44		30		30,00 €
07.07.2009	Do	1020730	7:57		30		30,00 €
08.07.2009	Do	2020914	9:27		30		30,00 €
09.07.2009	Do	2020915	9:42		30		30,00 €
10.07.2009	Do	2091604	16:14		30		180,00 €
11.07.2009	Do	2091605	16:29		30		180,00 €
12.07.2009	Do	2091606	16:47		30		180,00 €
13.07.2009	Do	2191705	17:38		30		540,00 €
14.07.2009	Do	2171904	19:46		30		450,00 €
15.07.2009	Do	2232008	20:01		30		750,00 €

# Sales-support: Company presentations

Transforming complex data and arguments from media research into tailor made Powerpoint-presentations



## Example: Hong Kong

- TV ad market**  
Total ad spending in 2008 was HK\$52bn, with terrestrial TV at a mild 2% growth to HK\$ 15.8bn, a share of 39%, worth 2bnUS\$.\* The market is dominated by Free-to-air TV channels, TVB Jade ahead of ATV Home, ATV World and TVB Pearl. Since 2 years mobile pay TV launched on CSL, SmartOne-Vodafone and PCCW. Smartphones and improving net 21Mbps have subscribers v finance chan International other channe Animax, El, a

## Example: The Philippines

- TV ad market**  
Total ad spending in 2008 was P180bn worth US\$3.8bn. TV having a share of 73% worth 2.7bn US\$.\*\* The Philippines experienced 12% year-on-year growth in TV ad market in 2009.\*\*\* A recent Group M report indicates that men have cut down on their television watching and started using the internet more while

## Online ad m Spending on HK\$869mw

- Emerging markets TV is still competing with traditional media**  
Outdoor, Radio, Print - and the "fresh" and fast growing medium internet grabs basic functions of traditional TV
- Powerful competitors in global Free-Sat and Pay-TV**  
News Corp (Fox), Turner (CNN/HBO), BBC World, NBC Universal, Bloomberg, CNBC, MTV, CME, P7S1, Viasat
- Predominance of global media agency networks**  
GroupM (WPP) (\$66.2bn); VivaKi (Publicis) (\$58.5bn); Omnicom Media Group (\$40bn); Aegis Media (\$33bn); Mediabrands (Interpublic) (\$29.7bn); Havas Media (\$18bn)\*. Knowing the decision makers and independence is mandatory

INHOUSE	CUSTOMER	AUDIENCE
Database Managed Sales Teams	Research	Community
Real time Sales Reporting	Advanced Sp of Formats	Interactivity
Inventory Management	Short Term Booking	Survey/Feedback

- Business structure needs
- Timing until market approach
- Estimated revenues, investment plan

# Exclusivity

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MyCrossmedia does not operate media-buying due to:

- a) the dominating position of global networks
- b) high capital risks
- c) neutrality as a media-analyst.

MyCrossmedia devotes itself to the Code of Conduct of the German media agencies organized in the OWM.

Neutrality and absolute discretion are fundamental principles.

# Biography

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**Director Media Consulting, ARBOmedia**

→International media marketing

**Senior Mediamanager, Crossmarketing arvato**

→Crossmedia marketing strategies for key accounts

**Senior Kampagnenmanager, 71 Interactive**

→Tools for convergence strategies in TV channel conglomerates

**Manager Marketing, BB Promotion**

→Event management, integration of major sponsors

**Werbeberater, IP Deutschland**

→TV marketing at the leader in the German TV market

**Marketing-Assistent, IngresASK Deutschland**

→Marketing of relational data bases

**Studium der Kommunikationswissenschaften**

→The scientific methods of modern media research

Almost 2 decades career in the media business



**VIELEN DANK!**

**Спасибо!**

Muito obrigado!

Dziękuję!

Thanks a lot!

**谢谢您！**

Teşekkürler!

Köszönöm!

Děkuji vám!

**شكرا لك!**

## MyCrossmedia

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