



Intelligence  
measured

# Medialyze

TransparenSee with 360 Media Metrics Audits

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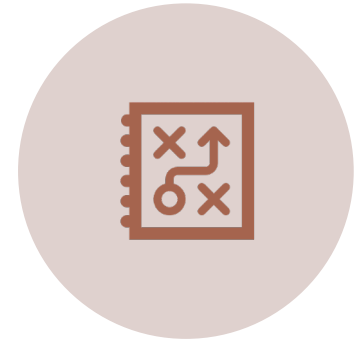
# Offer



ENSURE  
ACCOUNTABILITY AND  
TRANSPARENCY



OPTIMIZE PERFORMANCE  
AND ROI



MITIGATE RISKS AND  
FOSTER A FUTURE-  
PROOF STRATEGY



# Scope of verification

## *things we check*



### Ensure Accountability & Transparency

Budget Allocation on agreed-upon channels and placements

Transparency: accurate reporting, no overcharging or misinterpreting performance metrics

Compliance: adherence to industry standards and regulatory requirements



### Optimize Performance and ROI

Efficiency: cost-effective compared to industry benchmarks and competitors

Effectiveness: achievement in terms of reach, engagement or conversions

Strategy Validation: alignment of chosen media mix and planning with target audience and long-term goals



### Mitigate Risks and Foster a Future-Proof Strategy

Prevention: detection of ad fraud, waste or shadow buying

Long-term compliance: ensure alignment with upcoming regulations (data transparency, sustainability)

Continuous Improvement: leverage insights for ongoing monitoring

# Campaign Audit scope

## In scope

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Cross media performance audits

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Quality Assessment

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Sustainability Compliance

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Data Transparency Compliance

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Buying Efficiency Validation

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Strategy-Tactics Alignment Check

## Out-of-scope

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Agency selection

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Deal comparisons

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# Our Approach



## **We take audits seriously**

In-depth & Broad Scope of  
Analysis & Metrics



## **We look for long term relationships**

Continuous monitoring dashboards  
Regular follow ups and annual audits



## **We aim to future proof**

Compliance Assessments re  
Sustainability and  
Data Transparency Requirements



# Our approach is our USP



"We bring **unparalleled expertise** in audience measurement and agency planning, delivering a precise and thorough analysis of media performance.

## broad & in-depth



Our approach goes **beyond surface-level metrics** to quantify margins of error and dissect audience data at its most granular level, leveraging raw data insights.

## long term



With a **deep understanding** of buying currencies - CPT, viewable impressions, and their nuances across media types – we assess and explain the impact of changes, such as universe updates, advancements in measurement technologies, vendors, and shifts in calculation methods.

## future-proof

Our comprehensive expertise **ensures advertisers can navigate media complexities with confidence and precision.**"



# ENSURE ACCOUNTABILITY AND TRANSPARENCY

## BUDGET ALLOCATION

### Issue

Do the actual spends correspond with sales house agreements to ensuring solid negotiations in the future focused on optimization rather than restoring trust?

### Analysis

We measure differences between:

- the level of minimum and maximum investments that are specified in contractual agreements between agencies and saleshouses,
- the actual level of spends reported by agencies.

### Insights

We pinpoint significant discrepancies as they can distort the balance of power between media sales houses and complicate future negotiations. This is especially true if saleshouses specify a minimum share of investments in their contract; that often align with financial conditions such as the net cGRP.

			Year 1		
<u>ANNUAL INVESTMENTS</u>		CONTRACT CONDITIONS	CONTRACT	ACTUALS	Diff.
Market A	Sales house A		8.200.000 €	8.500.000 €	4%
	Channel pack 1	min	4.100.000 €	3.400.000 €	-17%
	Channel pack 2	max	2.050.000 €	2.833.333 €	38%
	Channel pack 3	min&max	2.050.000 €	2.266.667 €	11%
	Sales house B		5.400.000 €	5.500.000 €	2%
Market B	Channel pack 1	min	3.618.000 €	3.300.000 €	-9%
	Channel pack 2	min	1.782.000 €	2.200.000 €	23%
	Sales house A	min	4.000.000 €	4.400.000 €	10%
	Sales house B	min	2.400.000 €	1.600.000 €	-33%
	Total		20.000.000 €	20.000.000 €	0%

			Year 1		
<u>SHARE OF INVESTMENT</u>			CONTRACT	ACTUALS	Diff.
Market A	Sales house B		33%	22%	-33%
Market B	Sales house B		25%	23%	-8%

# ENSURE ACCOUNTABILITY AND TRANSPARENCY

## TRANSPARENCY & INDUSTRY STANDARDS COMPLIANCE

**Issue** Are the key performance indicators correctly and unambiguously defined and reported, ensuring effective follow up and optimization?

**Analysis** *The analysis is illustrated for the level of GRPs delivered in peak time.*

### **Accurate reporting**

We verify if data provided by agencies corresponds with the raw data. *Re time band example* we check if the actual numbers for a given time band represent this time band effectively based on the raw data.

### **No overcharging or misinterpreting performance metrics**

We analyse the performance according to the KPIs specified by the advertiser, the agency and the sales house.

*Re time band example* we verify if the level of GRPs per specified time band achieves the minimum threshold.

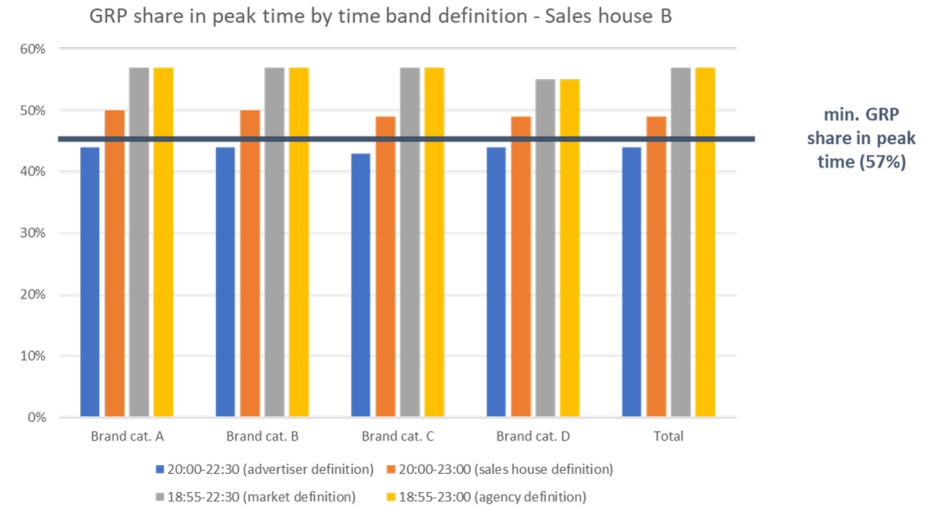
### **Adherence to industry standards**

We verify if data provided by agencies corresponds with the metric definitions specified by the industry.

*Re time band example* we verify if the industry standard of peak time is correctly measured and reported.

### **Insights**

We signal inconsistencies and lack of granularity at each stage, from procurement till post-buy evaluations, re defined objectives and reported actuals to allow correct monitoring and follow up during the campaign.



# ENSURE ACCOUNTABILITY AND TRANSPARENCY

## TRANSPARENCY & INDUSTRY STANDARDS COMPLIANCE

**Issue** To what extent is there transparency on investments, placements and reporting of digital ads?

**Analysis** We analyse documentation re consistency, completeness, clarity.

We offer the possibility to verify correct implementation and processing of online tagging systems in terms of mechanical exposure activity, data access and reporting. We set up test protocols, conduct tests, compare data and summarize findings.

**Insights** We signal any lack of transparency to optimize the business relationship with digital vendors.

# OPTIMIZE PERFORMANCE AND ROI

## EFFECTIVENESS

**Issue** Do actual campaign budget, GRP and Reach levels correspond with objectives?

**Analysis** We calculate potential savings for each GRP that exceeds the objective if budget and corresponding reach levels are achieved.

**Insights** The overdelivery of GRP / expressed by potentially savings represent on-top budget that can be spent to launch / strengthen other campaigns.

### Calculation per campaign

Brand category x	Campaign A ddmm/ddmm	Campaign B ddmm/ddmm	Campaign C ddmm/ddmm
<b>Procurement objectives</b>			
Budget	35.562 €	29.305 €	52.231 €
Eff. Reach 1+	55%	60%	53%
Eff. Reach 3+	28%	29%	26%
GRPs	200	201	201
<b>Actuals</b>			
Budget	34.459 €	29.051 €	52.191 €
Eff. Reach 1+	53,8%	75,2%	56,0%
Eff. Reach 3+	28,2%	42,4%	30,1%
GRPs	200	279	234
<b>Differences</b>			
Budget	-3,10%	-0,87%	-0,08%
Eff. Reach 1+	-1,4%	15,0%	2,9%
Eff. Reach 3+	0,2%	13,1%	4,1%
GRPs	0,0%	38,6%	16,2%
<b>POTENTIAL SAVINGS for GRP overdelivery</b>	<b>4 €</b>	<b>11.210 €</b>	<b>8.472 €</b>

### Sum of potential savings for all campaigns by category, market and period

<b>Potential savings</b>				
	Market A	Market B	Market A	Market B
	Period 1	Period 1	Period 2	Period 2
Brand cat. A	104.200 €	78.500 €	96.300 €	45.900 €
Brand cat. B	250.600 €	197.300 €	234.700 €	221.800 €
Brand cat. C	381.300 €	312.500 €	345.700 €	211.210 €
<b>Total</b>	<b>736.100 €</b>	<b>588.300 €</b>	<b>676.700 €</b>	<b>478.910 €</b>
<b>Grand total</b>	<b>2.480.010 €</b>			

# RISK MITIGATION & FUTURE-PROOF STRATEGY

## INSIGHTS LEVERAGED

**Issue** How can an overdelivery of GRP be avoided? What about the daily follow up to monitor weekly GRP distribution? Are their differences by channel pack, media planning mode, ...?

**Analysis** We use a deep-dive analysis of weekly GRP delivery of campaigns with an excessive overdelivery of GRPs. Moreover, the analysis compares channel packs that are planned using automated planning tools vs manual planning to verify if any trends can be observed. Results demonstrate a lower performance of channel pack 2 (automated planning)

**Insights** The results reveal the level of effectiveness of optimization efforts and fuel a thorough review of the relevance and effectivity of specific KPIs

Campaign	GRP	OBJECTIVE	weekly GRP	ACTUALS	weekly GRP	ACTUALS CHANNEL PACK 1	ACTUALS CHANNEL PACK 2
Campaign A	GRP WK1	100	33%	127	32%	33%	31%
	GRP WK2	100	33%	134	34%	37%	30%
	GRP WK3	100	33%	133	34%	30%	39%
	GRP TOTAL	300		394			
	Eff reach 1+	58,8%		65,0%			
Campaign B	GRP WK1	150	45%	171	41%	44%	35%
	GRP WK2	92	28%	127	30%	29%	32%
	GRP WK3	91	27%	123	29%	27%	33%
	GRP TOTAL	333		421			
	Eff reach 1+	57,3%		62,3%			
Campaign C	GRP WK1	117	33%	133	33%	37%	26%
	GRP WK2	117	33%	120	29%	28%	32%
	GRP WK3	116	33%	155	38%	36%	41%
	GRP TOTAL	350		408			
	Eff reach 1+	58,9%		62,7%			
Campaign D	GRP WK1	83	33%	97	26%	30%	24%
	GRP WK2	83	33%	146	39%	35%	42%
	GRP WK3	83	33%	130	35%	35%	34%
	GRP TOTAL	249		372			
	Eff reach 1+	55,0%		71,2%			
Campaign E	GRP WK1	92	33%	152	37%	30%	43%
	GRP WK2	92	33%	139	34%	39%	31%
	GRP WK3	91	33%	117	29%	32%	26%
	GRP TOTAL	275		409			
	Eff reach 1+	58,9%		69,3%			
	Eff reach 3+	30,5%		45,3%			

# RISK MITIGATION & FUTURE-PROOF STRATEGY

## AFFINITIES

**Issue** Is shadow buying\* applied?

**Analysis** We analyze **audience affinity** by channel and compare them with

- the channel mix proposed by the agency,
- the audiences defined in procurement and reported in post-buy evaluations,
- saleshouse conditions such as cGRP and ratecard per target.

**Insights** The detection of inconsistencies, lack of logic or ambiguous reasoning is then challenged for discussion and may lead to review the strategy and fuel future negotiations with sales houses.

Channel	All Adults 15+	Men 15+	Women 15+	SEM High 15+	SEM Med 15+
SABC1	21.86%	20.70%	22.92%	11.50%	25.57%
e.tv	20.85%	19.35%	22.23%	13.96%	24.13%
SABC2	10.11%	9.95%	10.26%	8.17%	11.36%
eExtra	7.62%	6.83%	8.34%	7.65%	8.17%
Mzansi Wethu	6.42%	5.22%	7.52%	3.11%	8.41%
eMovies Extra	6.04%	6.23%	5.87%	5.63%	6.87%
S3	5.77%	6.14%	5.43%	5.97%	6.05%
Mzansi Bioskop	5.37%	4.67%	6.01%	2.32%	6.94%
eMovies	5.24%	4.95%	5.52%	4.92%	5.85%
Zee Zonke	4.21%	3.24%	5.10%	1.73%	5.09%
MTV Base	4.07%	3.61%	4.49%	1.96%	5.33%
TNT Africa	3.89%	3.88%	3.89%	2.25%	4.50%
Channel O	3.71%	3.33%	4.05%	1.86%	4.74%
Mzansi Magic	3.47%	3.20%	3.71%	4.71%	3.74%
MM4	3.45%	3.13%	3.74%	2.48%	4.18%
eToonz	3.28%	2.88%	3.65%	1.94%	3.96%
Moja9.9	3.18%	2.53%	3.78%	1.69%	4.41%
Star Life	3.14%	2.53%	3.70%	3.08%	3.36%
Cartoon Network	2.88%	2.55%	3.18%	1.85%	3.40%
SWITCHD ON Channel 11	2.80%	2.35%	3.22%	1.11%	3.63%
eReality	2.69%	2.78%	2.62%	4.36%	2.29%
Movie Room	2.27%	2.20%	2.34%	1.72%	2.73%
Moja Love	2.20%	1.98%	2.40%	3.06%	2.41%
eSERIES	2.06%	2.17%	1.96%	2.64%	2.04%
Africa Magic Epic	2.02%	1.59%	2.43%	1.59%	2.31%
KIX	1.99%	2.10%	1.88%	0.87%	2.30%
Mzansi Magic Music	1.89%	1.73%	2.04%	0.90%	2.31%
SABC News Channel	1.76%	2.03%	1.50%	2.71%	1.49%
TLC Entertainment	1.69%	1.15%	2.18%	1.87%	1.90%
NatGeo Wild	1.60%	1.70%	1.51%	1.39%	1.78%

Rank All Ads	Channel	All Adults 15+	Men 15+	Women 15+	SEM High 15+	SEM Med 15+
1	SABC 1	100	95	105	53	117
2	e.tv	100	93	107	67	116
3	SABC 2	100	98	101	81	112
4	eExtra	100	90	109	100	107
5	Mzansi Wethu	100	81	117	48	131
6	eMovies Extra	100	103	97	93	114
7	S3	100	106	94	103	105
8	Mzansi Bioskop	100	87	112	43	129
9	eMovies	100	94	105	94	112
10	Zee Zonke	100	77	121	41	121
11	MTV Base	100	89	110	48	131
12	TNT Africa	100	100	100	58	116
13	Channel O	100	90	109	50	128
14	Mzansi Magic	100	92	107	136	108
15	MM4	100	91	108	72	121
16	eToonz	100	88	111	59	121
17	Moja9.9	100	80	119	53	139
18	Star Life	100	81	118	98	107
19	Cartoon Network	100	89	110	64	118
20	SWITCHD ON Channel 11	100	84	115	40	130
21	eReality	100	103	97	162	85
22	Movie Room	100	97	103	76	120
23	Moja Love	100	90	109	139	110
24	eSERIES	100	105	95	128	99
25	Africa Magic Epic	100	79	120	79	114
26	KIX	100	106	94	44	116
27	Mzansi Magic Music	100	92	108	48	122
28	SABC News Channel	100	115	85	154	85
29	TLC Entertainment	100	68	129	111	112
30	NatGeo Wild	100	106	94	87	111

\*Shadow buying is the process of investing in non-targeted audiences (at a more affordable price than the targeted audience that is reached as well by addressing this non-targeted audience).

Source: Arianna Programmes, any daily reach % ; 0600-2400; Jan-Dec 2024





# RISK MITIGATION & FUTURE-PROOF STRATEGY

## INSIGHTS LEVERAGED

**Issue** How do discrepancies evolve over time? Do monitoring and optimization pay off?

**Analysis** *The analysis is illustrated using the example of discrepancies between between objective and actual spends, GRPs and Reach levels.*

Using a long-trend analysis we verify

1. the difference between actuals and objectives over time to verify improvement.
2. the relationship between budget-GRP-Reach levels to assess the relevance of KPIs such as GRP to be a proxy for Reach levels.

**Insights** The results reveal the level of effectiveness of optimization efforts and fuel a thorough review of the relevance and effectivity of specific KPIs

Actuals vs objectives				
	Market A	Market B	Market A	Market B
	Period 1	Period 1	Period 2	Period 2
Budget	0%	0%	0%	0%
GRP	18%	10%	16%	8%
Eff Reach 1+	14%	10%	7%	6%
Eff Reach 3+	23%	24%	10%	18%



# RISK MITIGATION & FUTURE-PROOF STRATEGY

## LONG-TERM COMPLIANCE

**Issue** How to make sure that the organisation and coordination of media trading, buying and planning today is resilient to adapt to future regulatory requirements (re Sustainability, Data transparency)?

**Analysis** We look at key areas advertisers can play a role in ensuring future compliance and identify elements for improvement.

**Insights** The assessments functions as a guideline to smoothen the translation to compliance with future regulations.

### Article 24, Audience measurement

1. Providers of audience measurement systems shall ensure that their audience measurement systems and the methodology used by their audience measurement systems comply with the principles of transparency, impartiality, inclusiveness, proportionality, non-discrimination, comparability and verifiability.

2. Without prejudice to the protection of undertakings' trade secrets as defined in Article 2, point (1), of Directive (EU) 2016/943, providers of proprietary audience measurement systems shall provide, without undue delay and free of charge, to media service providers, to advertisers and to third parties authorised by media service providers and advertisers accurate, detailed, comprehensive, intelligible and up-to-date information on the methodology used by their audience measurement systems.

Providers of proprietary audience measurement systems shall ensure that the methodology used by their audience measurement systems and the way in which it is applied is independently audited once a year. At the request of a media service provider, a provider of a proprietary audience measurement system shall provide it with information on audience measurement results, including non-aggregated data, which relate to the media content and media services of that

media service provider. This paragraph shall not affect the Union's data protection and privacy rules.

3. National regulatory authorities or bodies shall encourage providers of audience measurement systems to draw up, together with media service providers, providers of online platforms, their representative organisations and any other interested parties, codes of conduct or shall encourage providers of audience measurement systems to comply with codes of conduct jointly agreed and widely accepted by media service providers, their representative organisations and any other interested parties.

Codes of conduct as referred to in the first subparagraph of this paragraph shall be intended to promote the regular, independent and transparent monitoring of the effective achievement of their objectives and compliance with the principles referred to in paragraph 1, including through independent and transparent audits.

4. The Commission, assisted by the Board, may issue guidelines on the practical application of paragraphs 1, 2 and 3, taking into account, where appropriate, codes of conduct as referred to in paragraph 3.

5. The Board shall foster the exchange of best practices related to the deployment of audience measurement systems through a regular dialogue between representatives of the national regulatory authorities or bodies, representatives of providers of audience measurement systems, representatives of media service providers, representatives of providers of online platforms and other interested parties.

**Note:** This is the final text of the European Media Freedom Act (EMFA) - Regulation (EU) 2024/1083 of 11 April 2024.



# How will we do it?

## ★ Onboarding to simplify the audit loop

- Direct access to media audience data via agency license and use of excel input templates
- Data cleaning

## ★ 360 Media Metrics Analysis

- Standard pivots output
- Presentation with key insights and next steps
- Build a database for long-trend analysis

## ★ TransparenSee Dashboard

- Import into Power BI or Power Query for continuous monitoring and integration within the advertiser's and agency's day-to-day

# We bring our measurement skills to the table

- ★ 3M3A has years of experience in auditing audience measurement systems. We have a deep understanding of how audience ratings are produced. This means we provide technical insights into the following:
  - Universe updates
  - Margin of error
  - Fluctuations in ratings
  - Reach build
- ★ If the client or media agency can provide direct access to the viewing data we can conduct independent analyses at a campaign level to verify and explain results that are under query.
- ★ 3M3A have experience in auditing all media types from out of home to online. From simple audience measurement methods to highly sophisticated machine learning systems.

# TRANSPARENSEE DASHBOARD

## LONG-TERM RELATIONSHIP BUILDING

**WHY** We empower teams dedicated at optimization campaign performance, agency relationships, internal media planning knowledge.

**HOW** We built a notification dashboard, that tracks objectives for a number of KPIs on a weekly, monthly, yearly basis to monitor campaign performance and support decision making of running and future campaigns.

- KPIs: e.g. SOV, net equivalent cGRP, SOI, share of zero ratings
- Objectives e.g. the average SOV the brand should meet to be competitive within the selected Umfeld of competitors
- Notification e.g. when the SOV falls below average with 5% in the first week of the campaign, the number of GRPs must be raised with 5% in the following week





# The Telco Category South Africa



Example of MTN as the client

# An analysis for MTN as client

- The analysis is done for TV investments and performance.
- When looking at MTN share of investments and share of voice compared to competitors throughout the year, we are well aware that the communication strategies of MTN and competitors cover other media as well.
- Our analysis concerns only TV but cannot be seen within the bigger picture.
- Any advise must be cross-checked with investments and performance of other media as well.



# THE TELCO CATEGORY & MTN

- The Category with Operators & MTN
- MTN campaigns within operator and device brand advertisers
- The MTN campaigns by month and level of investment





# THE TELCO CATEGORY

Competitor type	Advertiser	GRPs total	Eq. GRPs total	Investments total	Investments share
African	9 MOBILE	-	-	R3.300	
African	AIRTEL	4	7	R2.483.000	
African	AIRTELECOM	0	1	R452.900	
African	GLOBACOM LIMITED	3	6	R3.341.000	
African	MTC	41	41	R2.381.000	
<b>African Total</b>		<b>49</b>	<b>56</b>	<b>R8.661.200</b>	<b>1%</b>
Operator	CELL C LIMITED	1.866	1.497	R45.338.046	
Operator	MTN	11.588	11.565	R318.977.246	
Operator	NEXT CELLULAR	2	2	R242.532	
Operator	TELKOM	11.600	9.180	R188.721.850	
Operator	VODACOM	10.054	10.305	R419.298.443	
<b>Operator Total</b>		<b>35.110</b>	<b>32.549</b>	<b>R972.578.117</b>	<b>70%</b>
Broadband	DFA OPEN ACCESS NETWORK	0	0	R41.800	
Broadband	LIQUID INTELLIGENT TECHNOLOGIES	0	0	R60.000	
Broadband	RAIN LIMITED	2.600	2.590	R73.973.598	
Broadband	RSA WEB	18	18	R1.570.500	
Broadband	TOOMUCHWIFI	-	0	R125.635	
<b>Broadband Total</b>		<b>2.618</b>	<b>2.609</b>	<b>R75.771.533</b>	<b>5%</b>
Device	HONOR SOUTH AFRICA	41	39	R6.408.700	
Device	HUAWEI	2.261	2.264	R113.437.806	
Device	INFINIX	0	0	R48.500	
Device	OPPO SOUTH AFRICA	208	159	R11.030.614	
Device	SAMSUNG	3.500	2.799	R131.375.371	
Device	VIVO MOBILE COMMUNICAION CO LTI	638	453	R11.687.170	
Device	XIAOMI	4	9	R70.998	
<b>Device Total</b>		<b>6.652</b>	<b>5.724</b>	<b>R274.059.159</b>	<b>20%</b>
NA	LIG GOD SE KRAG IN MY KRISIS	1	1	R344.500	
<b>NA Total</b>		<b>1</b>	<b>1</b>	<b>R344.500</b>	<b>0%</b>
Retailer	PEPKOR HOLDINGS LIMITED	2.289	1.782	R45.357.808	
<b>Retailer Total</b>		<b>2.289</b>	<b>1.782</b>	<b>R45.357.808</b>	<b>3%</b>
Accessories	RED E	13	10	R6.345.750	
<b>Accessories Total</b>		<b>13</b>	<b>10</b>	<b>R6.345.750</b>	<b>0%</b>
<b>Grand Total</b>		<b>46.733</b>	<b>42.730</b>	<b>R1.383.118.067</b>	<b>100%</b>

Source: Arianna PCA summaries 2024  
MTC = MOBILE TELECOMMUNICATIONS COMPANY;  
MTN = MOBILE TELEPHONE NETWORKS



# THE TELCO CATEGORY

- One of the most active TV advertising categories. In 2024
  - it accounts for 25 advertisers with a daily average of 543 spots,
  - the average viewer is exposed to almost 2 telco ads per day.
- Within the category, the Operator category makes up 70% of gross spend. MTN's direct competitors are Vodacom, Telkom and Cell C.
  - The operators accounted for a daily average of 208 spots.
  - Operators reach about 20% of viewers with 1.4 telco ads on an average day.

# THE OPERATORS SHARE

With 33% share of spend and 36% of the Equivalent GRPs, **MTN** is the biggest advertiser within the Operator category

Advertiser	Insertions total	GRPs total	GRPs share	Eq. GRPs total	Eq. GRPs share	Investments total	Investments share
CELL C LIMITED	3.151	1.866	5%	1.497	5%	R45.338.046	5%
MTN	39.817	11.588	33%	11.565	36%	R318.977.246	33%
NEXT CELLULAR	7	2	0%	2	0%	R242.532	0%
TELKOM	16.839	11.600	33%	9.180	28%	R188.721.850	19%
VODACOM	76.077	10.054	29%	10.305	32%	R419.298.443	43%
<b>Grand Total</b>	<b>135.891</b>	<b>35.110</b>	<b>100%</b>	<b>32.549</b>	<b>100%</b>	<b>R972.578.117</b>	<b>100%</b>

# THE OPERATORS TARGET GROUPS

- Overall operators' campaigns target the average viewer: **broad**, somewhat skewed to females.
- Only Next Cellular has a higher focus on SEM H.

## Sum of Eq. GRPs

Advertiser	All adults	Men 15+	Womem 15+	SEM H	SEM M
CELL C LIMITED	1.497	1.341	1.640	1.014	1.713
MTN	11.565	10.521	12.520	8.635	13.017
NEXT CELLULAR	2	3	2	3	3
TELKOM	9.180	8.398	9.896	6.430	10.564
VODACOM	10.305	9.495	11.047	9.214	11.072
<b>Grand Total</b>	<b>32.549</b>	<b>29.757</b>	<b>35.104</b>	<b>25.296</b>	<b>36.367</b>

## Index of All adults

Advertiser	All adults	Men 15+	Womem 15+	SEM H	SEM M
CELL C LIMITED	100	90	110	68	114
MTN	100	91	108	75	113
NEXT CELLULAR	100	137	66	120	108
TELKOM	100	91	108	70	115
VODACOM	100	92	107	89	107
<b>Grand Total</b>	<b>100</b>	<b>91</b>	<b>108</b>	<b>78</b>	<b>112</b>

# THE OPERATORS

## GROSS SPENDS BY SALESHOUSE

- Overall, **DMS** takes the highest share of gross spends, followed by SABC and eMedia.
- Compared to other operators, MTN spends less at DMS, suggesting they focus on a broad target.

Advertiser	Sales House					Grand Total
	DMS	eMedia	Independent	Paramount	SABC	
CELL C LIMITED	R10.960.165	R5.598.383	R2.271.787		R26.507.711	R45.338.046
MTN	R109.806.107	R96.253.149	R32.538.586	R14.160.553	R66.218.851	R318.977.246
NEXT CELLULAR					R242.532	R242.532
TELKOM	R97.540.654	R39.381.146	R836.847	R22.423	R50.940.780	R188.721.850
VODACOM	R251.467.711	R50.740.043	R12.401.556	R5.404.776	R99.284.357	R419.298.443
<b>Grand Total</b>	<b>R469.774.637</b>	<b>R191.972.721</b>	<b>R48.048.776</b>	<b>R19.587.752</b>	<b>R243.194.231</b>	<b>R972.578.117</b>

Advertiser	Sales House					Grand Total
	DMS	eMedia	Independent	Paramount	SABC	
CELL C LIMITED	24%	12%	5%	0%	58%	100%
MTN	34%	30%	10%	4%	21%	100%
NEXT CELLULAR	0%	0%	0%	0%	100%	100%
TELKOM	52%	21%	0%	0%	27%	100%
VODACOM	60%	12%	3%	1%	24%	100%
<b>Grand Total</b>	<b>48%</b>	<b>20%</b>	<b>5%</b>	<b>2%</b>	<b>25%</b>	<b>100%</b>

# ESTIMATING NET SPENDS

- In general, the level of discount is high in South Africa. The key reason being the package/bundling strategies of sales houses. Any advertiser - regardless its size, can buy a “bundle” of spots or GRPs at a price effectively 70% (more) of the rate card price.
- For the Telco category, we estimate the overall nett spend to be just over R500 million, representing an **approximate 62% discount** off rate card.



# ESTIMATING NET SPENDS

Competitor type	Advertiser	Gross Investments	Est Nett Investment
Accessories	RED E	R6.345.750	R1.586.438
<b>Accessories Total</b>		<b>R6.345.750</b>	<b>R1.586.438</b>
African	9 MOBILE	R3.300	R1.650
African	AIRTEL	R2.483.000	R620.750
African	AIRTELECOM	R452.900	R113.225
African	GLOBACOM LIMITED	R3.341.000	R835.250
African	MTC	R2.381.000	R595.250
<b>African Total</b>		<b>R8.661.200</b>	<b>R2.166.125</b>
Broadband	DFA OPEN ACCESS NETWORK	R41.800	R20.900
Broadband	LIQUID INTELLIGENT TECHNOLOGIES	R60.000	R15.000
Broadband	RAIN LIMITED	R73.973.598	R30.883.053
Broadband	RSA WEB	R1.570.500	R392.625
Broadband	TOOMUCHWIFI	R125.635	R37.691
<b>Broadband Total</b>		<b>R75.771.533</b>	<b>R31.349.268</b>
Device	HONOR SOUTH AFRICA	R6.408.700	R1.628.050
Device	HUAWEI	R113.437.806	R40.290.739
Device	INFINIX	R48.500	R12.125
Device	OPPO SOUTH AFRICA	R11.030.614	R3.512.306
Device	SAMSUNG	R131.375.371	R38.442.505
Device	VIVO MOBILE COMMUNICAION CO LTI	R11.687.170	R6.980.585
Device	XIAOMI	R70.998	R67.448
<b>Device Total</b>		<b>R274.059.159</b>	<b>R90.933.759</b>
NA	LIG GOD SE KRAG IN MY KRISIS	R344.500	R86.125
<b>NA Total</b>		<b>R344.500</b>	<b>R86.125</b>
Operator	CELL C LIMITED	R45.338.046	R24.985.632
Operator	MTN	R318.977.246	R128.784.249
Operator	NEXT CELLULAR	R242.532	R230.405
Operator	TELKOM	R188.721.850	R77.687.541
Operator	VODACOM	R419.298.443	R144.759.765
<b>Operator Total</b>		<b>R972.578.117</b>	<b>R376.447.593</b>
Retailer	PEPKOR HOLDINGS LIMITED	R45.357.808	R24.494.148
<b>Retailer Total</b>		<b>R45.357.808</b>	<b>R24.494.148</b>
<b>Grand Total</b>		<b>R1.383.118.067</b>	<b>R527.063.455</b>

# THE REAL VIEW ON COST EFFICIENCY

- The high discounting reframes the view of cost efficiency.
- At gross level,
  - MTN's ratecard 30" all adults is 8% cheaper than the Operator category average.
  - Telkom is the cheapest with 31% less than average.

Advertiser	Eq. GRPs total	Investments total	30" CPP	30" CPP Index of Avg
CELL C LIMITED	1.497	R45.338.046	R30.288	101
MTN	11.565	R318.977.246	R27.582	92
NEXT CELLULAR	2	R242.532	R101.055	338
TELKOM	9.180	R188.721.850	R20.559	69
VODACOM	10.305	R419.298.443	R40.688	136
<b>Grand Total</b>	<b>32.549</b>	<b>R972.578.117</b>	<b>R29.881</b>	<b>100</b>

- When ratings are available, we can calculate the overall effective CPP and observe the difference between the gross and net spends and identify the effective discount (see next slide).
  - Among the operators, MTN's discount level of 78% is very similar to biggest competitors Telkom and Vodacom, leaving Telkom with a higher ROI.



# THE AVG EST NET EQ COST PER GRP

## REAL EFFICIENCY

Competitor type	Advertiser	Avg Eq. cGRP	Avg Est Nett Eq. cGRP	Effective CPP discount
Accessories	RED E	R 759.175	R 204.553	73%
<b>Accessories Total</b>		<b>R 759.175</b>	<b>R 204.553</b>	<b>73%</b>
African	9 MOBILE			
African	AIRTEL	R 342.537	R 85.198	75%
African	AIRTELECOM	R 626.122	R 156.901	75%
African	GLOBACOM LIMITED	R 520.582	R 130.101	75%
African	MTC	R 101.909	R 25.459	75%
<b>African Total</b>		<b>R 296.744</b>	<b>R 74.159</b>	<b>75%</b>
Broadband	DFA OPEN ACCESS NETWORK	R 701.972	R 403.333	43%
Broadband	LIQUID INTELLIGENT TECHNOLOGIES	R 225.526	R 55.556	75%
Broadband	RAIN LIMITED	R 239.563	R 49.865	79%
Broadband	RSA WEB	R 114.478	R 28.640	75%
Broadband	TOOMUCHWIFI	R 9.852.198	R 3.769.050	62%
<b>Broadband Total</b>		<b>R 345.473</b>	<b>R 95.116</b>	<b>72%</b>
Device	HONOR SOUTH AFRICA	R 1.764.400	R 473.075	73%
Device	HUAWEI	R 298.926	R 63.640	79%
Device	INFINIX	R 257.221	R 63.816	75%
Device	OPPO SOUTH AFRICA	R 493.842	R 147.581	70%
Device	SAMSUNG	R 211.272	R 48.488	77%
Device	VIVO MOBILE COMMUNICAION CO LTD	R 70.570	R 21.647	69%
Device	XIAOMI	R 7.806	R 7.412	5%
<b>Device Total</b>		<b>R 282.083</b>	<b>R 66.944</b>	<b>76%</b>
NA	LIG GOD SE KRAG IN MY KRISIS	R 324.207	R 81.250	75%
<b>NA Total</b>		<b>R 324.207</b>	<b>R 81.250</b>	<b>75%</b>
Operator	CELL C LIMITED	R 73.926	R 18.500	75%
Operator	MTN	R 181.897	R 39.960	78%
Operator	NEXT CELLULAR	R 100.593	R 96.002	5%
Operator	TELKOM	R 332.540	R 72.600	78%
Operator	VODACOM	R 254.737	R 52.611	79%
<b>Operator Total</b>		<b>R 239.817</b>	<b>R 50.744</b>	<b>79%</b>
Retailer	PEPKOR HOLDINGS LIMITED	R 46.448	R 14.325	69%
<b>Retailer Total</b>		<b>R 46.448</b>	<b>R 14.325</b>	<b>69%</b>
<b>Grand Total</b>		<b>R 255.049</b>	<b>R 57.109</b>	<b>78%</b>

# MTN CAMPAIGNS

- MTN flighted 31 campaigns.
- The campaigns can be grouped as campaigns with a top – medium or low level of investment.

TOP

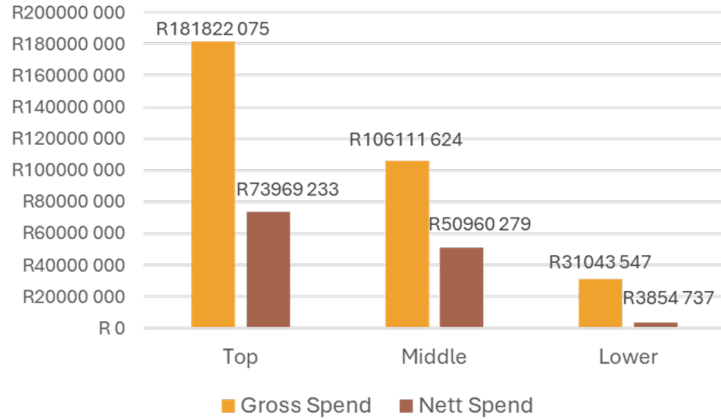
MEDIUM

LOW

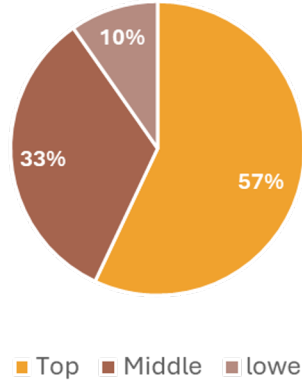
	Total
MTN MOBILE INTERNET GOLD	R63 847 028
MTN YELLOW PLANS	R39 073 722
MTN MYMTN HOME	R28 093 919
MTN COMPETITION	R26 879 100
MTN MEGA PLANS	R23 928 306
MTN DIRECT	R16 952 905
MTN UNCAPPED FIBRE	R16 872 185
MTN BLACK FRIDAY	R13 799 200
MTN SAMSUNG GALAXY A04E	R9 553 994
MTN 2-FOR-1 DEAL	R9 144 141
MTN MI FI ROUTER	R8 942 313
MTN HOME WI-FI	R7 129 530
GC MTN	R7 019 000
MTN HISENSE U964 LTE	R6 196 800
MTN PREPAID AIRTIME	R5 351 941
MTN CORPORATE	R5 149 615
MTN IPHONE 16	R4 733 978
MTN MOBILE INTERNET PLATINUM	R4 268 400
MTN IPHONE 16 PRO	R4 245 550
MTN HUAWEI NOVA 12I	R3 981 096
MTN MOBILE SILVER	R3 637 839
MTN BONUS BONANZA	R2 913 489
MTN SUPERFLEX	R2 785 000
MTN FIBRE	R1 694 100
MTN PULSE	R1 449 000
MTN CORPORATE COMPETITION	R685 800
GC MTN PULSE	R431 295
MTN	R148 000
GCN MTN CORPORATE	R40 600
GC MTN DATA	R21 000
GC MTN NIN	R8 400
	R318 977 246

# MTN CAMPAIGNS BY LEVEL OF INVESTMENT

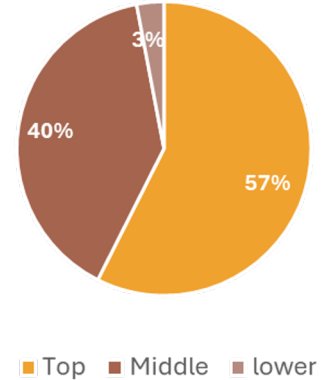
MTN Gross & Nett Spend



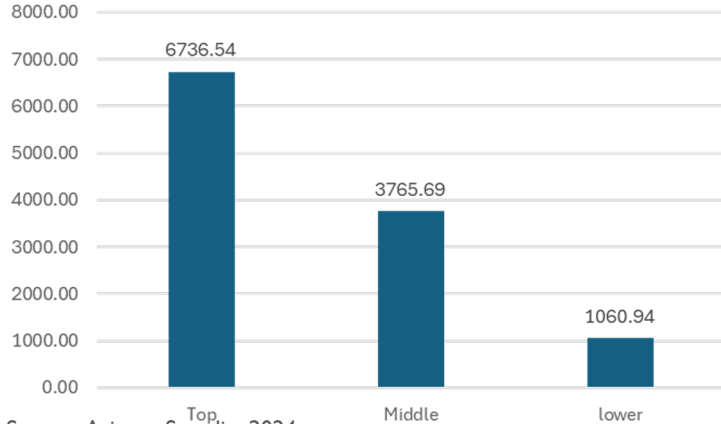
% Gross Spend



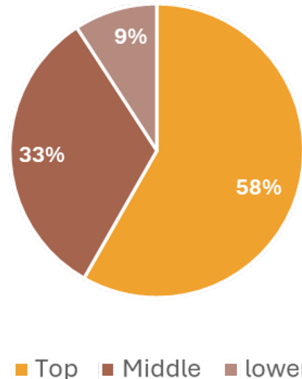
% Nett Spend



GRPs

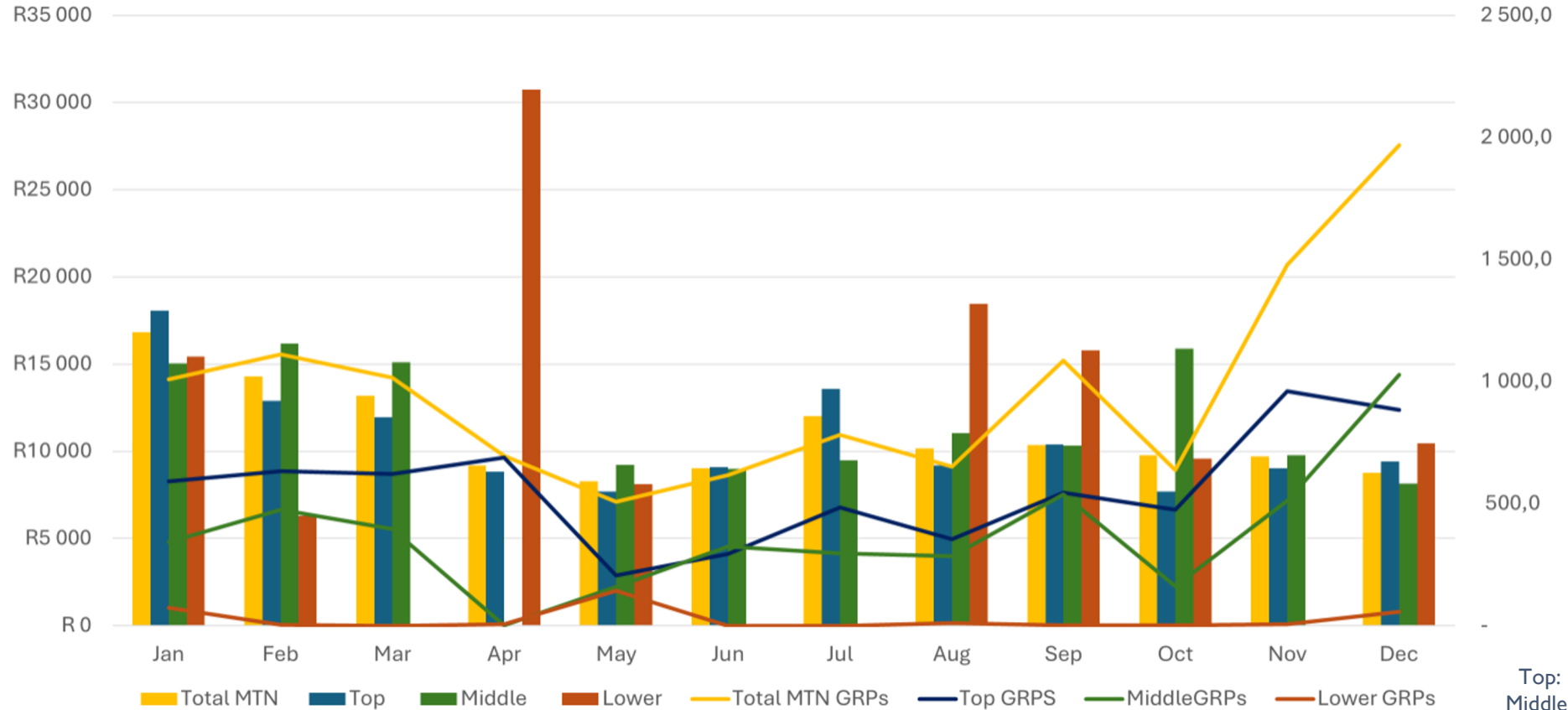


% GRPs



- 5 campaigns contribute to 57% of net spend and 58% of GRPs
- 16 campaigns contribute to 40% of net spend and 33% of GRPs
- 10 campaigns contribute to 3% of net spend and 9% of GRPs
- With lower level campaigns showing a higher ROI, there is an interest in further investigating the factors causing this difference compared to top and low level of investment type of campaigns.

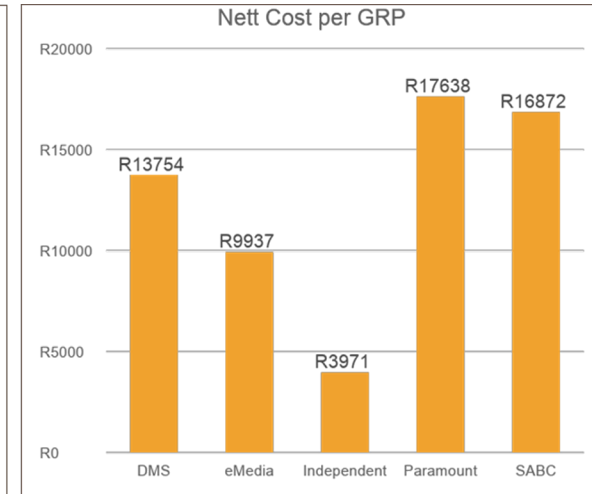
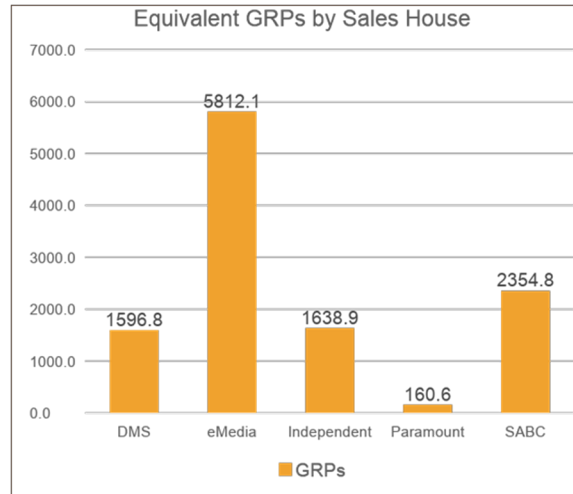
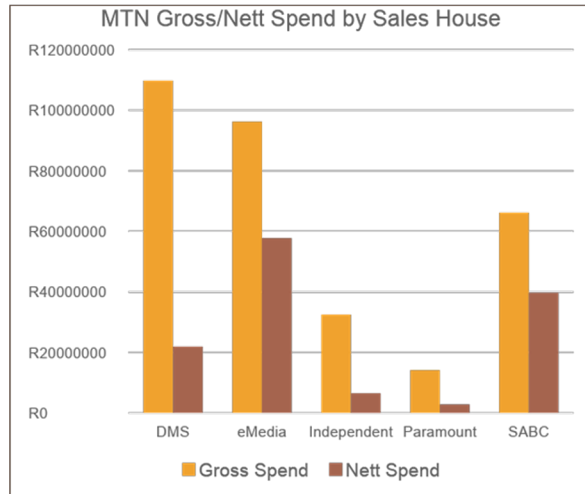
# MTN NET CGRP & EQ. GRPs PER MONTH



Top: R64m-R24m  
Middle: R17m-R4m  
Lower: R3m and below

# MTN CAMPAIGNS BY SALES HOUSE

- At a Nett spend level:
  - 17% of spend and 14% of GRPs on DMS;
  - 5% of spend and 14% of GRPs on Independent;
  - 31% of spend and 20% of GRPs on SABC
  - 45% of spend and 50% of GRPs on eMedia
  - 2% of spend and 1% of GRPs on Paramount
- Highest spend and GRP levels on eMedia suggest a broad target market. eMedia also delivers the lowest CPGRP outside of the Independent.



# THE TELCO CATEGORY & MTN

- The Category with Operators & MTN
- MTN campaigns within operator and device brand advertisers
- The MTN campaigns by month and level of investment



# OPTIMIZE PERFORMANCE AND ROI EFFICIENCY

**Issue** Do media investments align with competitors?

**Analysis** We benchmark the delivered GRPs and actual investments with competitors in the market to identify the advertiser's index of share of voice versus investment.

**Insights** We signal significant levels of share of voice to avoid over and under representation in the advertising space. MTN gets the highest return in SOV among 'device brands' and is N°2 among 'telco brands'.

	Spot total	Spot distr	GRP total	GRP distr	Eq GRP total	Eq GRP distr	Est. Discount invest	Est. Discount invest share	SOV (Eq GRP)/SOI		Invest total	Invest share	Avg cGRP total	Avg Eq cGRP total	% discount
MTN	39.817	48%	11.405	67%	11.563	70%	R159.636.005	54%	130		R318.977.246	57%	153.797	27.586	50%
HUAWEI	19.255	23%	2.166	13%	2.264	14%	R64.534.349	22%	63		R113.437.806	20%	207.134	50.114	57%
SAMSUNG	23.323	28%	3.385	20%	2.798	17%	R73.160.620	25%	68		R131.375.371	23%	156.058	46.958	56%
Total	82.395	100%	16.956	100%	16.624	100%	R297.330.974	100%	100		R563.790.423	100%	172.329	48.536	
	Spot total	Spot distr	GRP total	GRP distr	Eq GRP total	Eq GRP distr	Est. Discount invest	Est. Discount invest share	SOV (Eq GRP)/SOI		Invest total	Invest share	Avg cGRP total	Avg Eq cGRP total	% discount
MTN	39.817	30%	11.405	35%	11.563	37%	R159.636.005	33%	112		R318.977.246	34%	153.797	27.586	50%
TELKOM	16.839	13%	11.575	35%	9.180	30%	R85.034.757	18%	167		R188.721.850	20%	52.884	20.559	45%
VODACOM	76.077	57%	9.639	30%	10.301	33%	R236.273.241	49%	68		419.298.443	45%	171.401	40.704	56%
Total	132.733	100%	32.620	100%	31.044	100%	R480.944.002	100%	100		926.997.539	100%	126.027	29.616	



# OPTIMIZE PERFORMANCE AND ROI

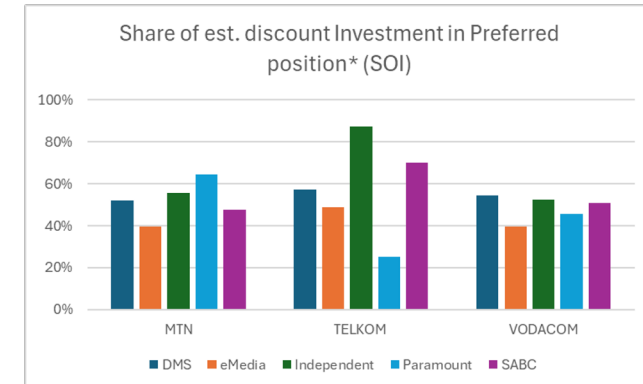
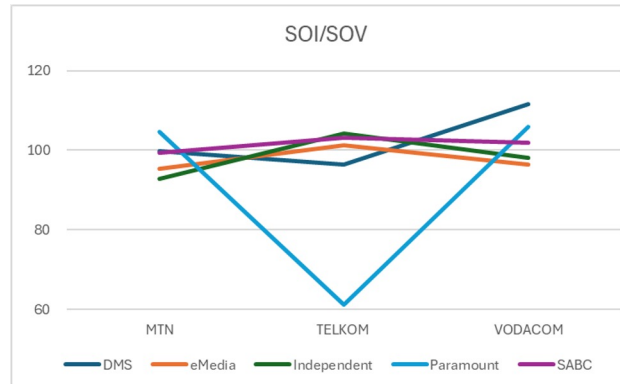
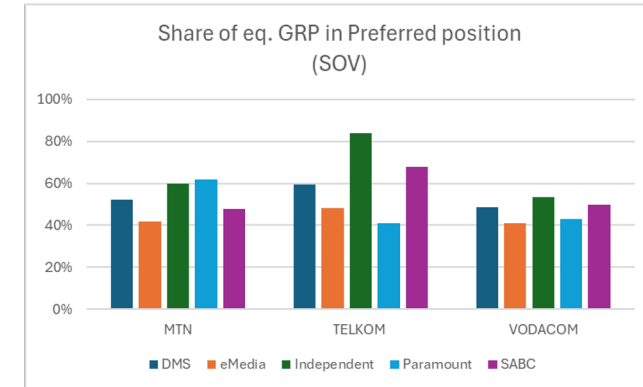
## EFFICIENCY & EFFECTIVENESS

**Issue** Do investments in preferred position precede the level of GRPs?

**Analysis** We compare the level of investments with the level of delivered GRP to verify any significant outliers. Looking at *operator brand advertisers*, the overall share of investment is very much in line with the share of voice. Although small in absolute figures, the big exception are Telkom campaigns on Paramount's network.

**Insights** The benefits for sales houses may be taken into account in future negotiations and it is recommended to closely follow up the level of GRP in preferred positions.

\*excluding breaks with 1 to 4 ads only





# OPTIMIZE PERFORMANCE AND ROI

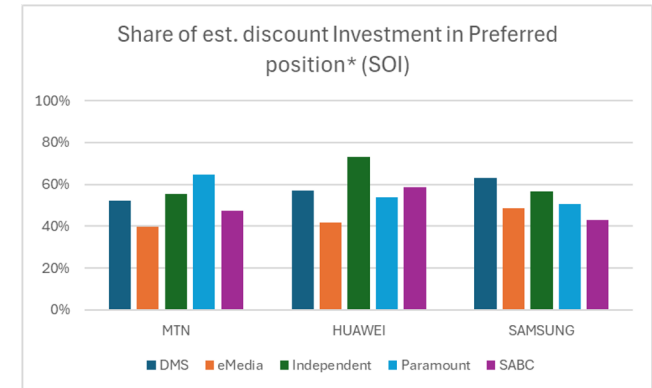
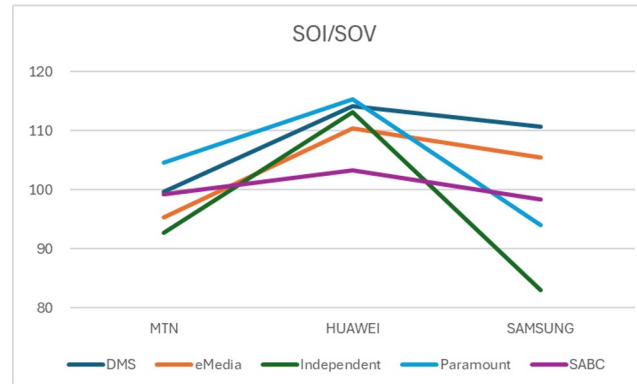
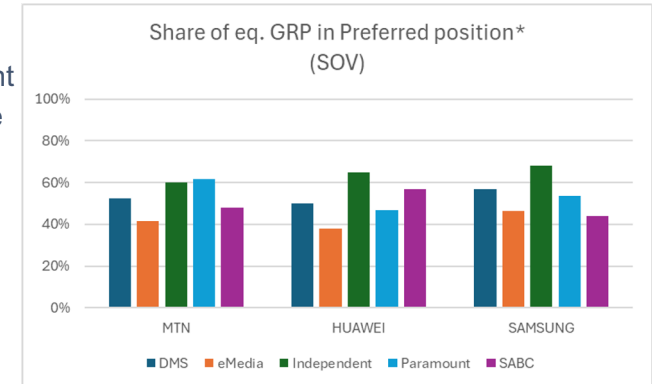
## EFFICIENCY & EFFECTIVENESS

**Issue** Do investments in preferred position precede the level of GRPs?

**Analysis** We compare the level of investments with the level of delivered GRP to verify any significant outliers. Looking at *device brand advertisers*, the overall the share of investment is higher than share of voice for MTN and Huawei. Sales houses in charge of campaigns from MTN and Huawei have a clear benefit. For Samsung only DMS and eMedia benefit (also taking the largest part of Samsung campaigns).

**Insights** The benefits for sales houses may be taken into account in future negotiations and it is recommended to closely follow up the level of GRP in preferred positions.

\*excluding breaks with 1 to 4 ads only



# OPTIMIZE PERFORMANCE AND ROI

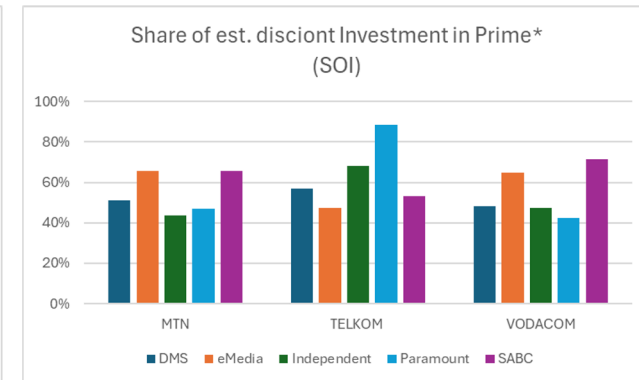
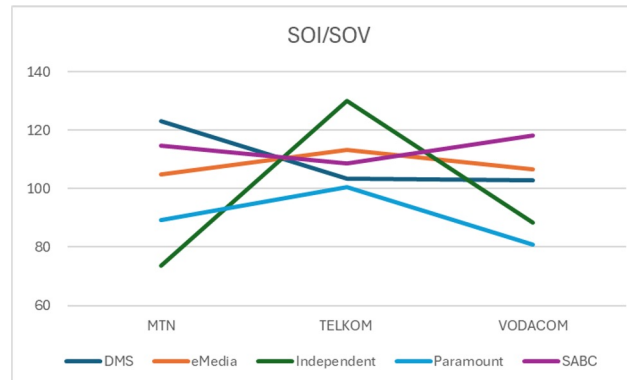
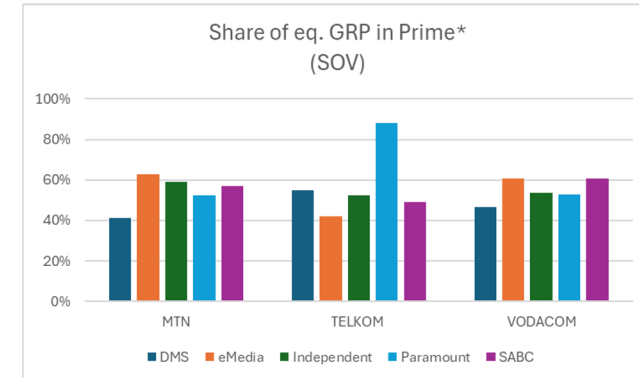
## EFFICIENCY & EFFECTIVENESS

**Issue** Do investments in prime time precede the actual GRPs?

**Analysis** We compare the level of investments with the level of delivered GRP to verify any significant outliers. Looking at *operator brand advertisers* the ratio between share of investment and share of voice is mostly beneficial for sales houses. Independent and Paramount for MTN and Vodacom being the exception.

**Insights** The benefits for sales houses may be taken into account in future negotiations and it is recommended to closely follow up the level of GRP in preferred positions.

\* 17:00-21:59



# OPTIMIZE PERFORMANCE AND ROI

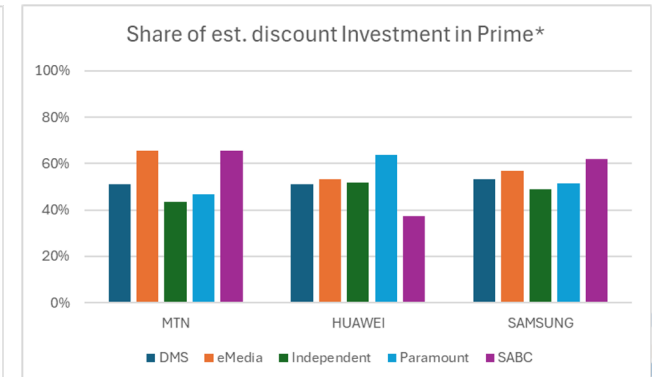
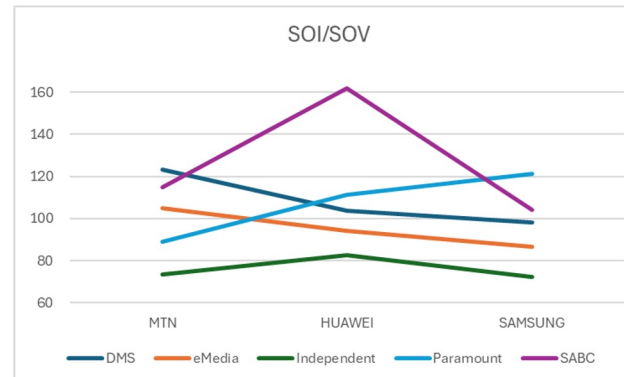
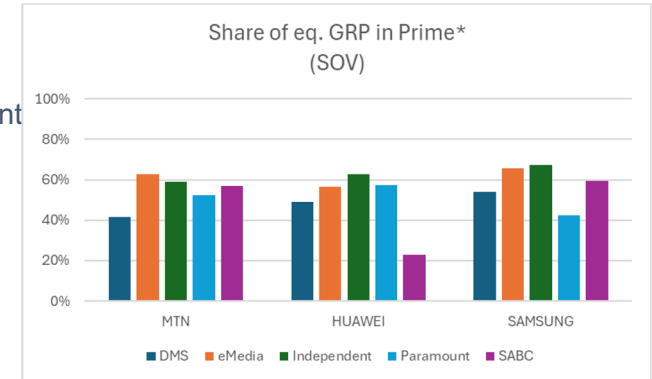
## EFFICIENCY & EFFECTIVENESS

**Issue** Do investments in prime time precede the actual GRPs?

**Analysis** We compare the level of investments with the level of delivered GRP to verify any significant outliers. Looking at *device brand advertisers*, the ratio between share of investment and share of voice highly depends on brand and sales house's network. Zooming in on the biggest sales houses, DMS and eMedia get most out of MTN campaigns.

**Insights** If they are clear benefits for sales houses, they may be taken into account in future negotiations and it is recommended to closely follow up the level of GRP in prime time.

\*17:00-21:59



# OPTIMIZE PERFORMANCE AND ROI

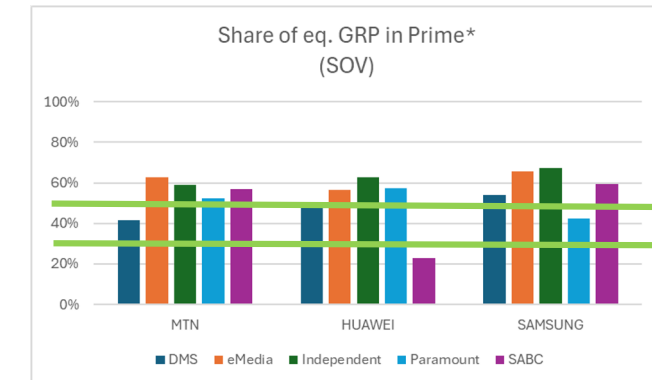
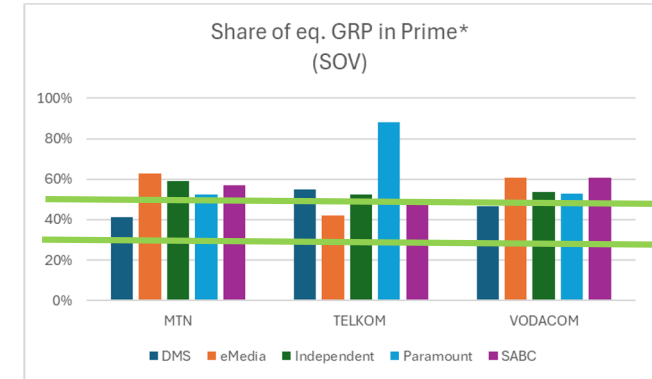
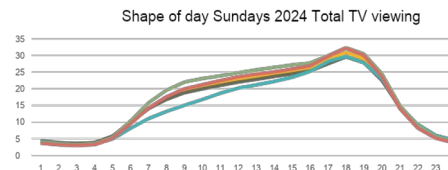
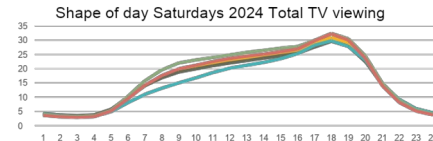
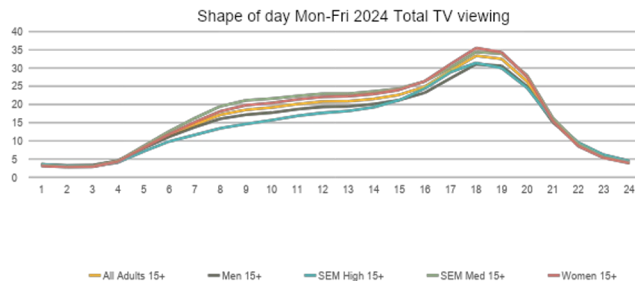
## STRATEGY VALIDATION

**Issue** Does the campaign delivery follow the natural delivery of audiences across time band?

**Analysis** We analyse viewing patterns and verify to what extent objectives such as % of GRP in peak time are feasible and meaningful. Peak time can be defined as 17h00-22h00 making up 40% of the audiences between 0600-24h00, compared to 28% of the minutes. We expect prime time usage to be a minimum of 30% and a maximum of 50%.

**Insights** Significant discrepancies between actual viewing and minimum thresholds (e.g. MTN at eMedia) allow us to detection counterproductive KPIs and fuel review.

\*17:00-21:59

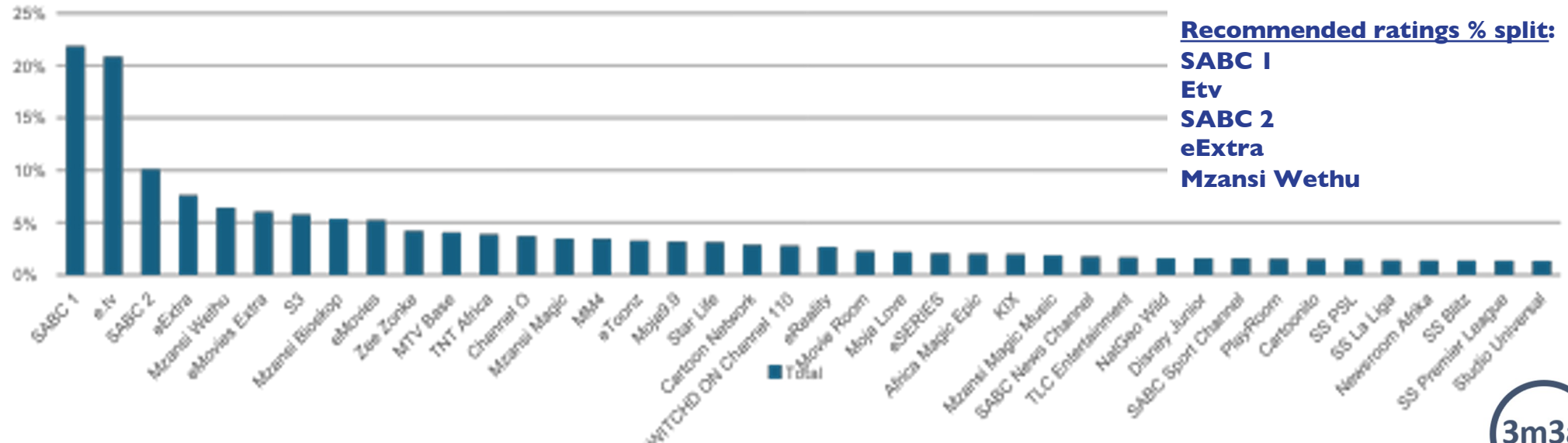


# OPTIMIZE PERFORMANCE AND ROI

## STRATEGY VALIDATION

- Issue** Is the media strategy in terms of channel mix based on actual viewing patterns?
- Analysis** We analyse viewing patterns and verify to what extent the proposed channel mix is optimal.
- Insights** Significant discrepancies between actual viewing and the media plan allow us to challenge the strategy and saleshouse negotiations. The chart shows the average daily reach of a channel for All Adults with a recommended channel mix.

All Adults: Av Daily Reach Top 40 Channels



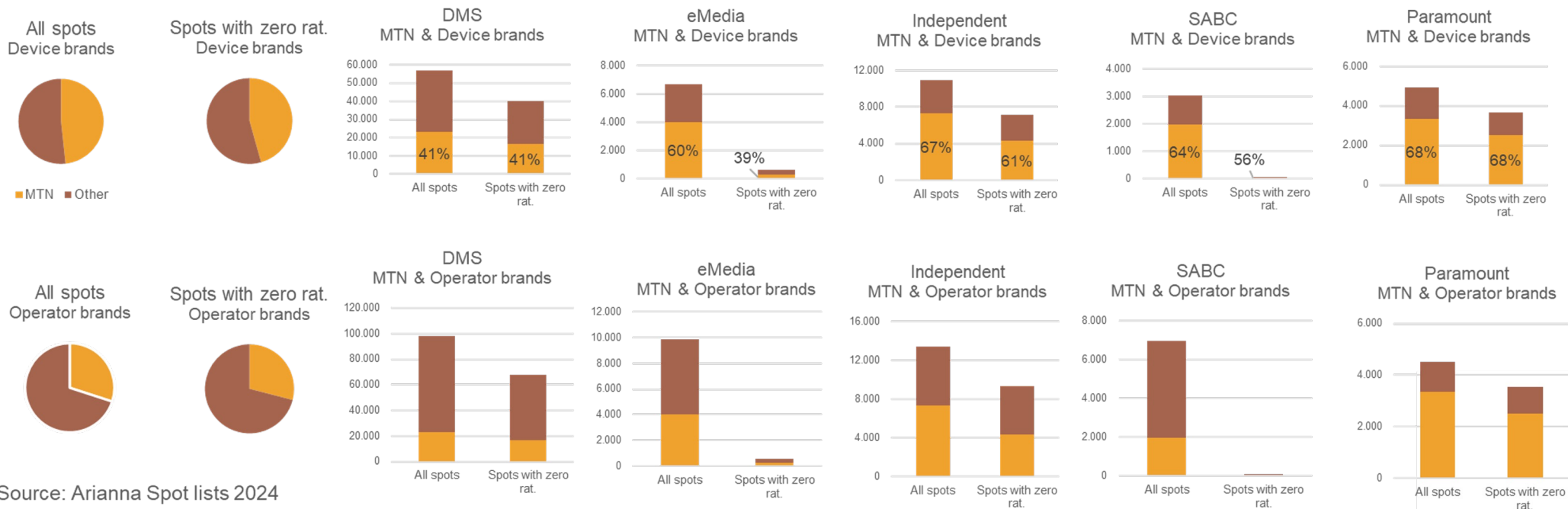
# RISK MITIGATION & FUTURE-PROOF STRATEGY

## PREVENTION

**Issue** What is the incidence rate of zero ratings? Are they equally distributed across advertisers and across sales house?

**Analysis** At brand level, the share of Zero's is somewhat more positive for MTN. At sales house level, the difference between DMS and eMedia, the two biggest sales houses is remarkable. At brand by sales house level, brands are equally impacted, especially on DMS and Paramount network.

**Insights** The analysis suggests a closer look onto the performance of these sales houses (at channel, campaign and break level).



# RISK MITIGATION & FUTURE-PROOF STRATEGY

## PREVENTION

- Issue** What is the incidence rate of zero ratings among channels (in Prime, 17:21:59)? Are they equally distributed?
- Analysis** There is a big variation in the incidence of zero ratings, ranging from 100% to 0% among big and small channels.
- Insights** A careful selection of channels according to the level of zero ratings can be useful to optimize campaign performance.

Channel	Spot Prime* total	Zero Prime total	Zero Prime share	Channel	Spot Prime total	Zero Prime total	Zero Prime share	Channel	GRP Prime total	Zero Prime total	Zero Prime share
Peoples Weather Channel	15	15	100%	Telemundo	1252	1098	88%	SABC News Channel	17	7	41%
CBS Justice	770	769	100%	WildEarth	8	7	88%	eNCA	796	279	35%
Sky News	1478	1476	100%	Real Time	1009	881	87%	PlayRoom	3	1	33%
Curiosity Channel	693	692	100%	Zee World	394	339	86%	kykNET & kie	1064	350	33%
ROK	191	190	99%	Food Network	1486	1253	84%	Universal Channel	1110	364	33%
Mpumla Kapa TV	104	103	99%	One Gospel	371	312	84%	Power-Up	503	155	31%
TBN	831	823	99%	DreamWorks	29	24	83%	MM4	261	75	29%
CNN International	508	503	99%	KykNet Lekker	1538	1267	82%	SS PSL	1387	393	28%
Cape Town TV	296	293	99%	Home and Garden	1361	1092	80%	SA Music	22	6	27%
BBC Earth	1076	1063	99%	SS Football	277	222	80%	Movie Room	728	194	27%
MM1	530	522	98%	MM3	493	385	78%	ePlesier	162	42	26%
Travel Channel	1761	1734	98%	SS Variety 3	388	303	78%	SS Premier League	846	217	26%
ESPN2	169	166	98%	E! Entertainment	1210	927	77%	Africa Magic Epic	394	82	21%
Trace Gospel	703	690	98%	CBS Reality	1107	829	75%	TNT Africa	307	47	15%
TRACE Africa	326	319	98%	SS Blitz	781	563	72%	MTV Base	588	86	15%
SS Golf	183	179	98%	Dumisa	659	469	71%	TLC Entertainment	1097	157	14%
SS Tennis	268	262	98%	Mzansi Magic Music	983	693	70%	eSERIES	119	16	13%
HISTORY	1194	1166	98%	BBC Lifestyle	835	587	70%	SWITCHD ON Channel 110	133	14	11%
BBC World News	1445	1409	98%	WWE Channel	93	62	67%	Moja9.9	563	53	9%
ESPN	196	191	97%	Soweto TV	231	152	66%	Moja Love	1436	125	9%
Discovery Family	1689	1630	97%	SS Cricket	529	346	65%	kykNET	973	68	7%
MM2	476	459	96%	Studio Universal	941	600	64%	SABC Sport Channel	50	3	6%
Discovery Channel	1805	1736	96%	BBC Brit	1147	690	60%	Mzansi Bioskop	588	27	5%
SS Action	314	301	96%	The Home Channel+	37	22	59%	Cartoon Network	29	1	3%
Comedy Central	807	771	96%	SS Variety 4	490	290	59%	S3	1406	17	1%
1Max	410	388	95%	SWITCHD ON Channel 109	137	81	59%	eMovies	566	6	1%
TRACE Urban	529	491	93%	Zee One	234	137	59%	eReality	369	3	1%
BBC UKTV	907	841	93%	M-Net	1742	1018	58%	Mzansi Magic	1770	12	1%
SS Variety 1	427	392	92%	SS Rugby	913	527	58%	eExtra	910	2	0%
ME	165	151	92%	SS La Liga	235	135	57%	Mzansi Wethu	2180	3	0%
The Home Channel	33	30	91%	Newsroom Afrika	869	476	55%	SABC 2	1133	1	0%
kykNET NOU!	1091	990	91%	KIX	663	357	54%	e.tv	1544	0	0%
ID Xtra	1526	1382	91%	Cartoonito	39	20	51%	SABC 1	1510	0	0%
VIA	1145	1036	90%	NatGeo Wild	667	336	50%	Zee Zonke	1015	0	0%
SS Variety 2	179	161	90%	BET	993	434	44%	eMovies Extra	658	0	0%
National Geographic	1313	1179	90%	Channel O	880	381	43%	Star Life	571	0	0%
MTV	572	512	90%	1 KZN TV	650	281	43%				
SS Motorsport	170	151	89%	SS Grandstand	710	306	43%				

Source: Arianna Spot lists 2024

\*Prime: 17:00-21:59



# THE TELCO CATEGORY & MTN

- The Category with Operators & MTN
- MTN campaigns within operator and device brand advertisers
- The MTN campaigns by month and level of investment





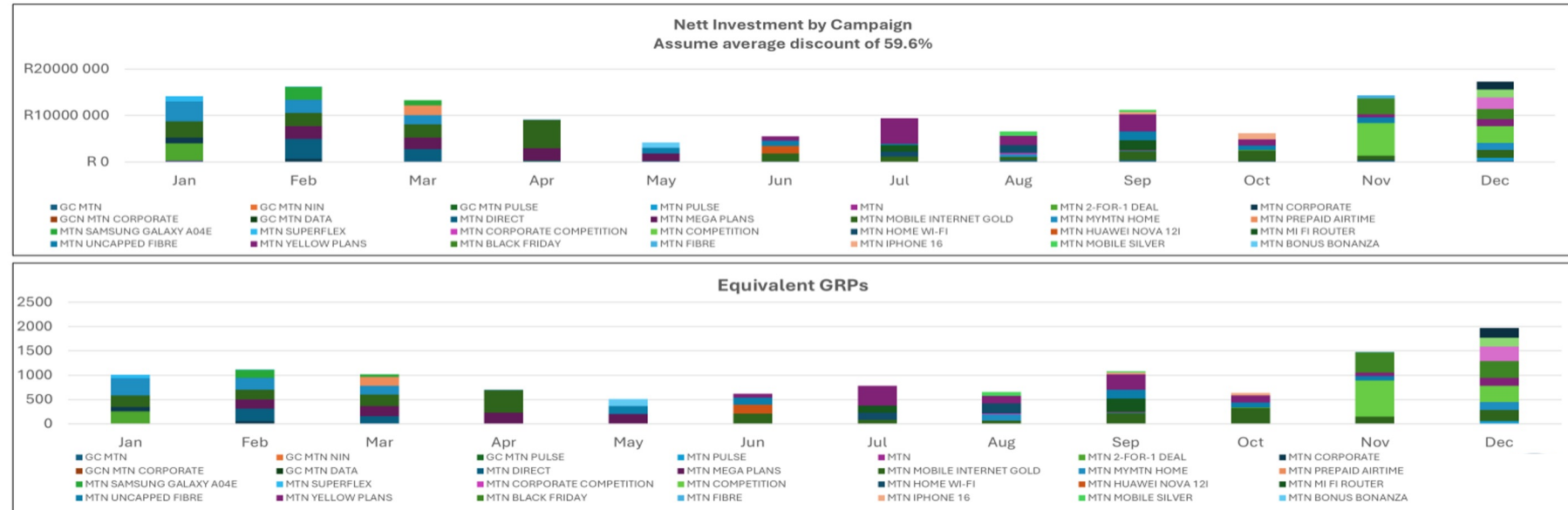
# OPTIMIZE PERFORMANCE AND ROI

## STRATEGY VALIDATION

**Issue** Does the media strategy in terms of campaign periods take into account ratecards' month indexes and competitors' spends?

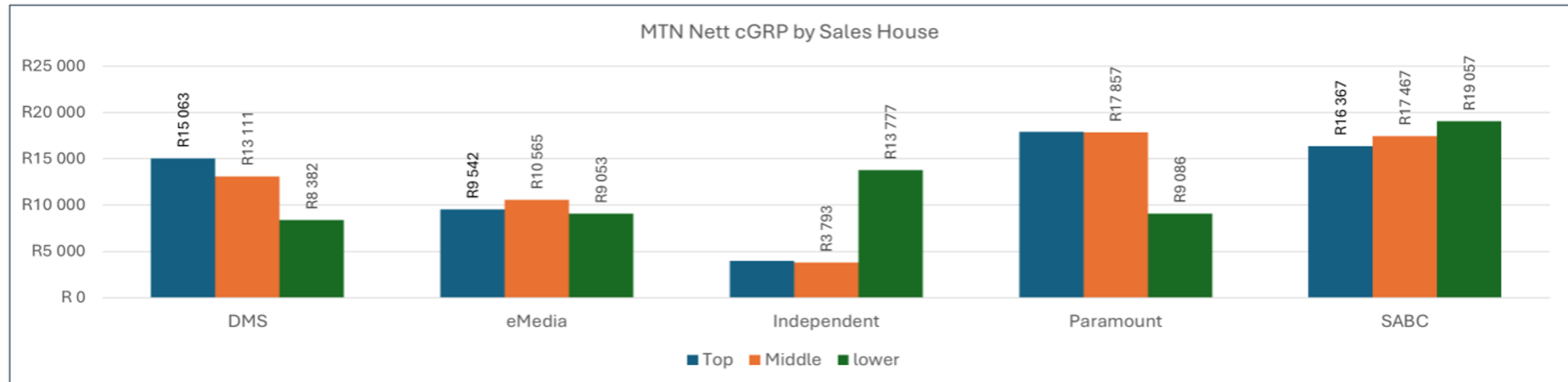
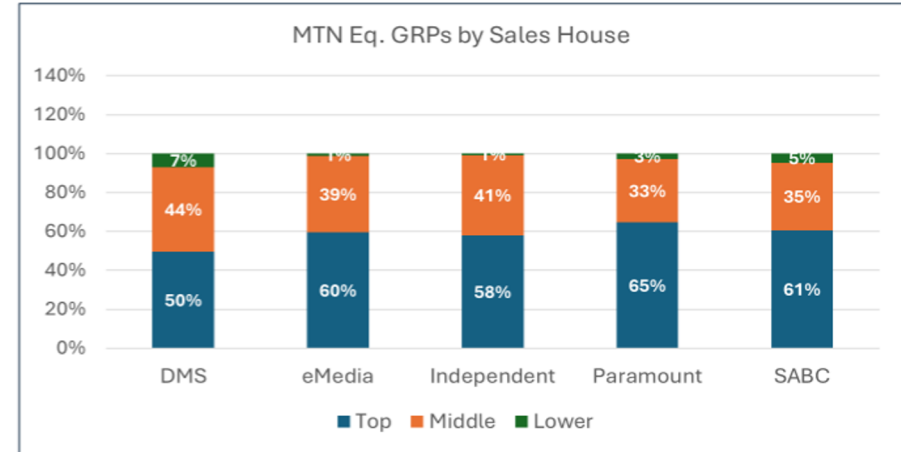
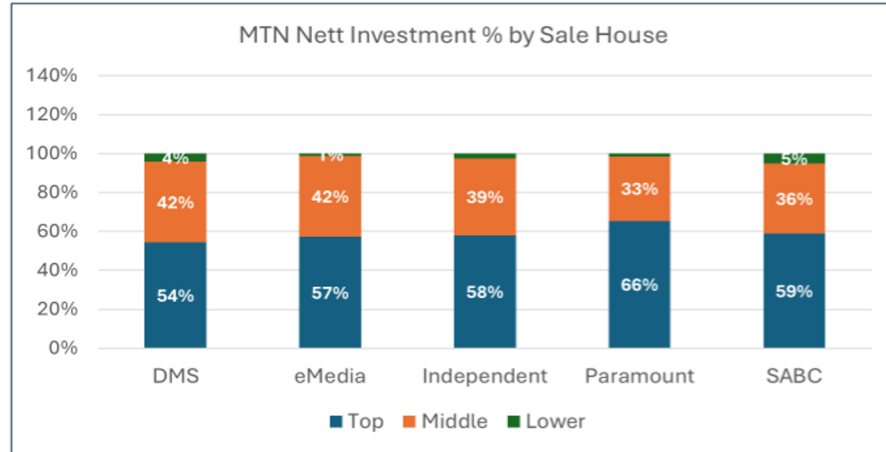
**Analysis** We analyse the level of investments (gross, net) and delivered **equivalent GRPs** against indexes that are applied by month. 51% of total spend is focused on the November – February period, traditionally a high clutter period for advertising. This is also the same period as key competitors – potentially an opportunity to increase SOV outside of these more cluttered months.

**Insights** The timings of the campaigns can be optimized balancing between at the one hand the cluttered versus the non-cluttered periods and expensive versus less-expensive months at the other hand.



# MTN CAMPAIGNS BY SALESHOUSE

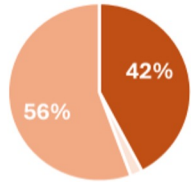
Top: R64m-R24m  
Middle: R17m-R4m  
Lower: R3m and below



# MTN DAYPART BY NET SPEND & EQ GRPs

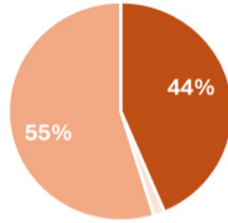
INVESTMENT

Total MTN Daypart Split



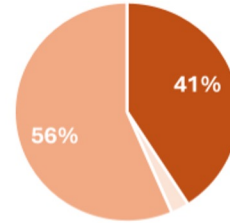
Day Night Prime

Top



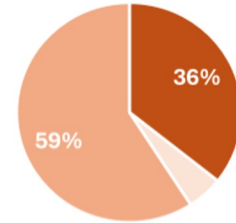
Day Night Prime

Middle



Day Night Prime

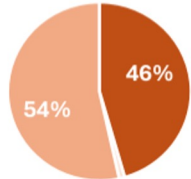
Lower



Day Night Prime

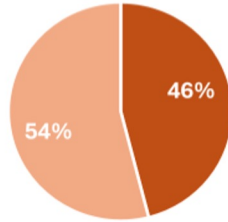
GRPs

Total MTN Daypart Split



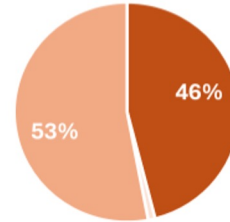
Day Night Prime

Top



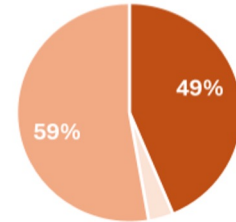
Day Night Prime

Middle



Day Night Prime

Lower



Day Night Prime



# Overall conclusions & recommendations

- The telco category is composed of different subcategories, each represent a set of players who compete for one another with share of voice and share of investment.
- For some of the campaigns MTN might be in competition with *operators*, for other campaigns the focus may be more on *device brand advertisers*;
  - Within the operators, MTN is the biggest spender, but Telkom got a better ROI reflected in more eq. GRPs at a lower cost.
  - Compared to device brands Huawei and Sumsung, MTN gets the best ROI.

# Overall conclusions & recommendations

- **MTN** can optimize its ROI by finetuning the required levels of KPI's by its relevant subcategory.
  - Looking at the share of voice and investments of other players in each of the subcategory, MTN can define the required level of GRPs and spends to remain competitive, whilst avoiding overspends.
  - For each of the planned campaign, MTN then identifies the corresponding subcategory and levels of KPIs as objectives to follow up once running.
- In addition we identified a couple of areas with potential room for optimization
  - Investigate the factors contributing to a higher ROI for medium level investment campaigns
  - Review conditions with sales house re investments in prime time and preferred position (given the relative lower increase in eq GRPs per investment).
  - Review the timing of the campaigns in light of less cluttered and less expensive periods for communication.

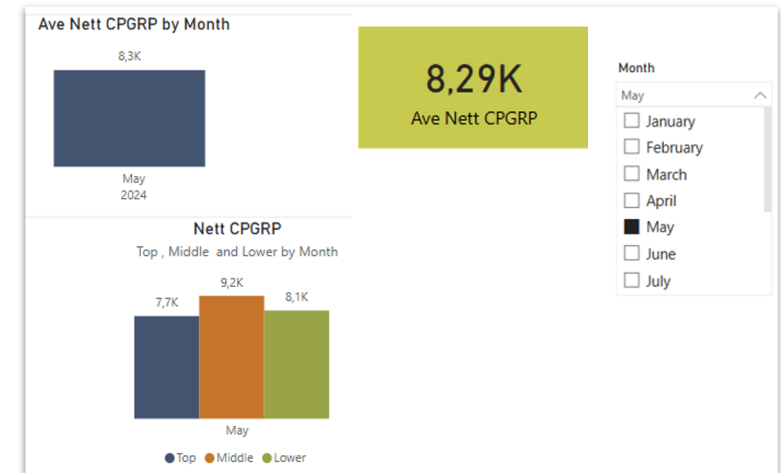
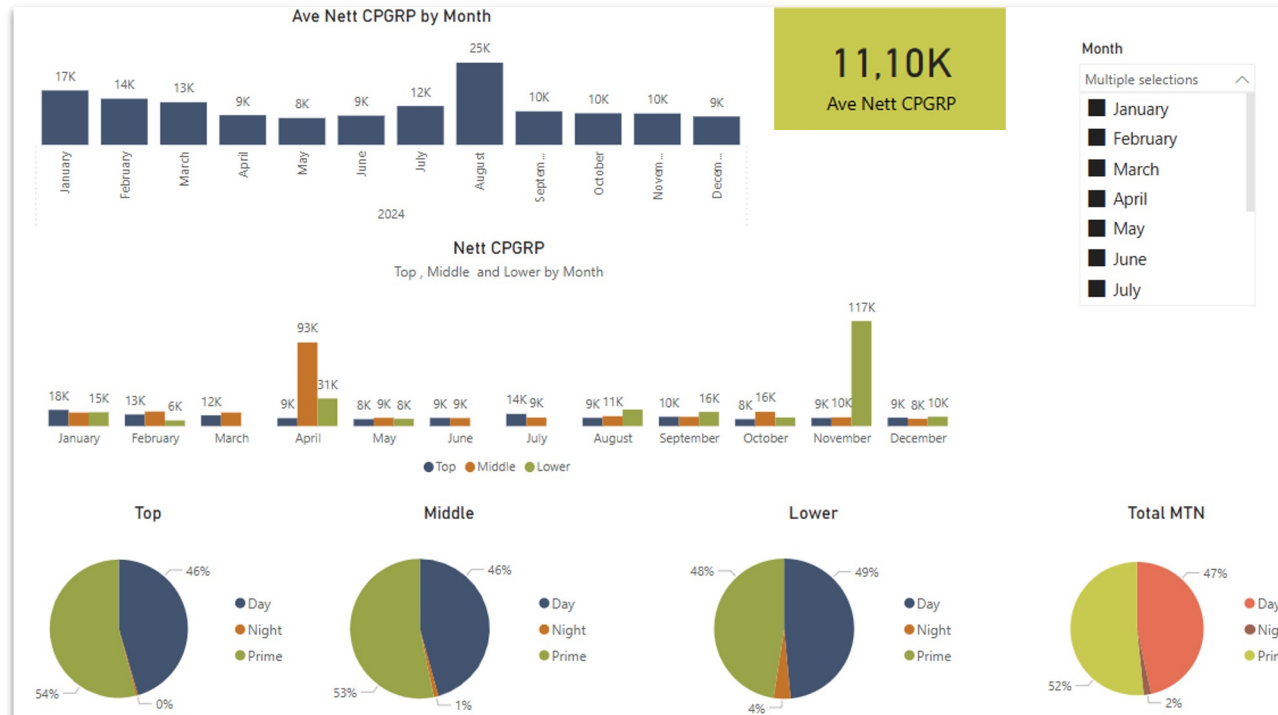
# MTN Dashboard

- Following the ad hoc audit, we'd build a dashboard, in consultation with the MTN team to further monitor campaigns.
- Based on above findings we'd suggest to identify the Umfeld for each of the MTN campaign ('operator' vs 'device') to select the corresponding objectives, relative to the competitors' performance and viewing behavior.
- F.i. Campagin A competes with device brands, where we define the maximum share of zero ratings as 65%.
- The actual share of ratings will be reported on a weekly basis, by channel for MTN, Huawei and Samsung.
- A notification will be sent if the share of ratings succeeds 65% and/or is more than 5% higher than competitors.



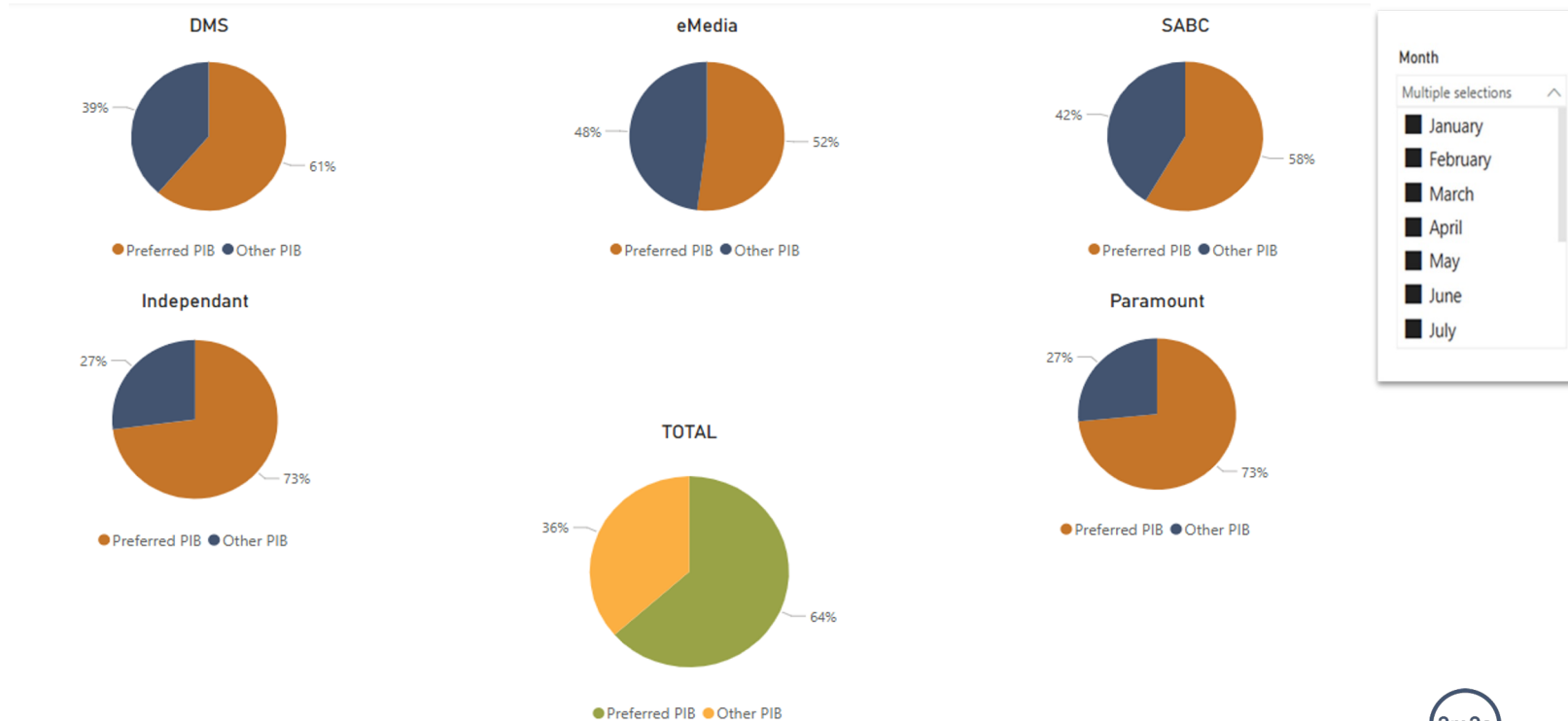
# MTN Dashboard

- Illustration



# MTN Dashboard

- Illustration







# Thank you



Let's talk

