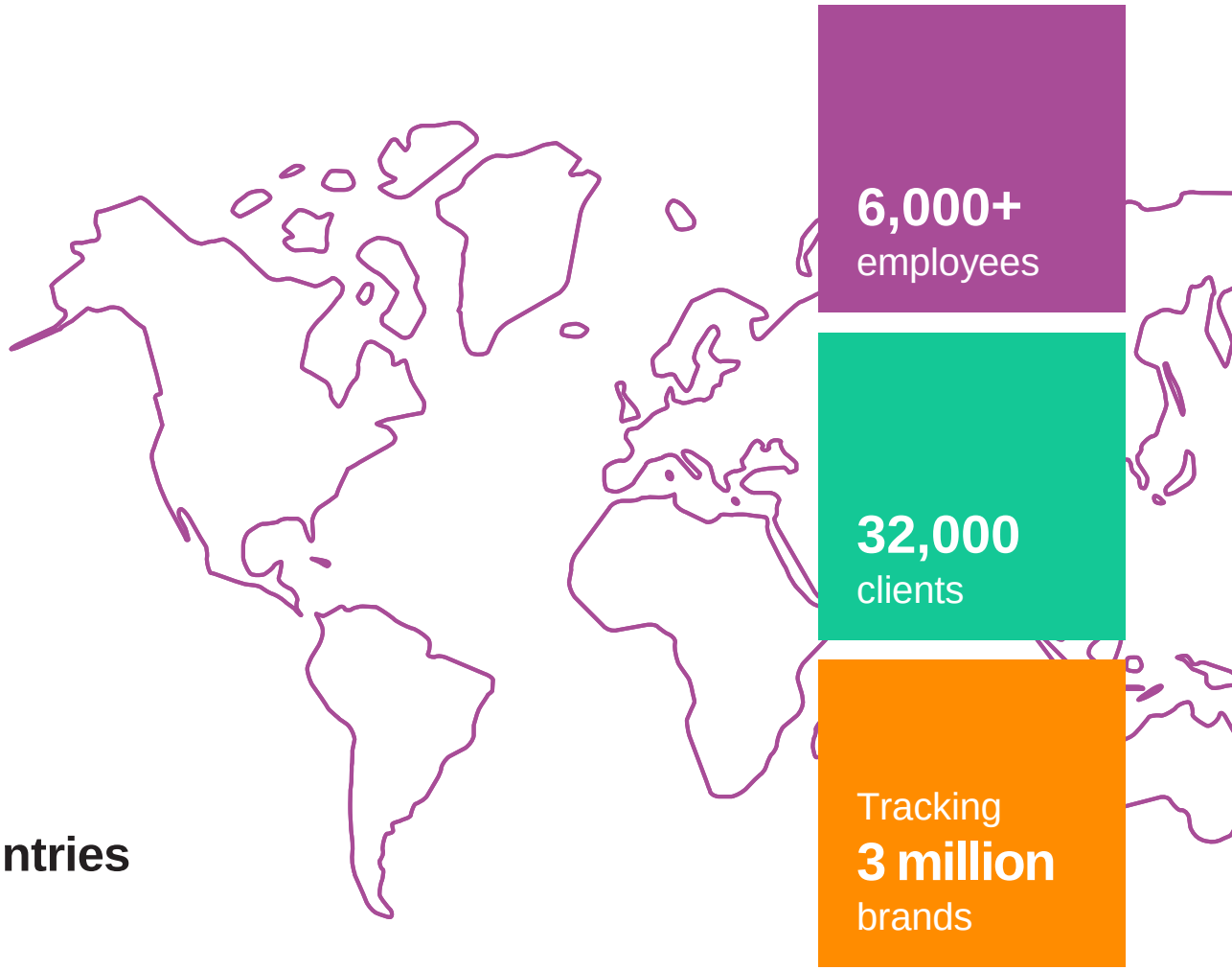
From

TV to TotalVideo

Renata Uhlarikova
Kantar Media
International Business Development Director
November 15th 2017

About Kantar Media

- **6,000+** employees in **50+** countries
- Our experts work with **32,000 clients** tracking **3 million brands** in more than **70 countries**
- Our clients are diverse and span global brand owners, media owners and media agencies
- We leverage expertise and knowledge across Kantar to bring the best solutions to our clients
- **We measure TV audiences in more than 50 countries**



NETFLIX

Netflix CEO: Broadcast TV Will Be Dead By 2030

Is television dead?

THE HUFFINGTON POST

Is TV Dead? Not so Fast!

Looking for missing TV viewers

The TV industry is doomed

theguardian

The TV is dead, long live television

BUSINESS INSIDER

Television Isn't Really Dying - But There Is A War Over It

TV IS NOT DEAD
TV IS NOT DEAD
TV IS NOT DEAD
TV IS NOT DEAD
TV IS NOT
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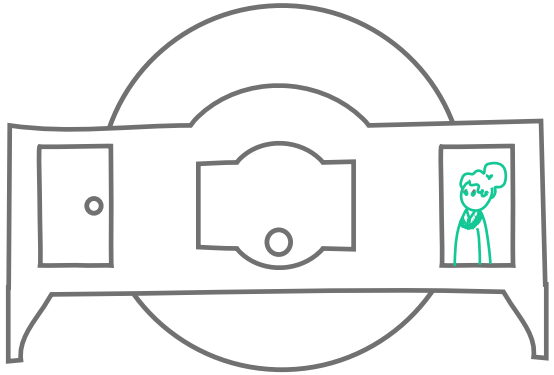
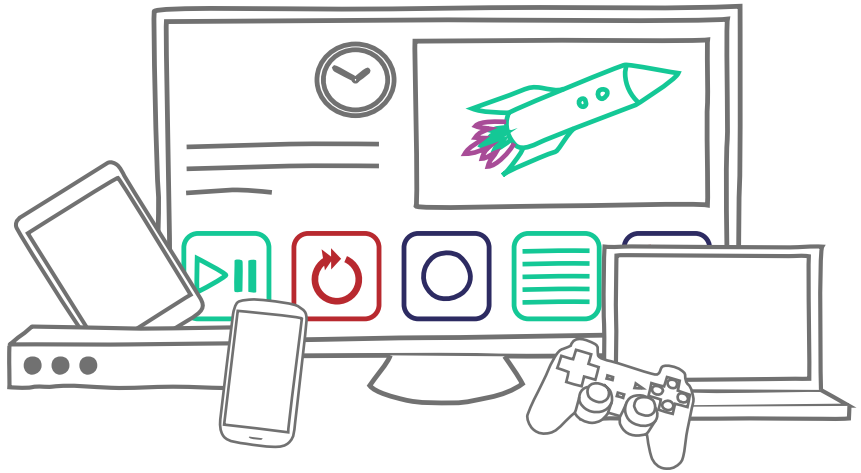
TV IS NO

Television is nearly 100 years old
Its evolution now prompts a redefinition





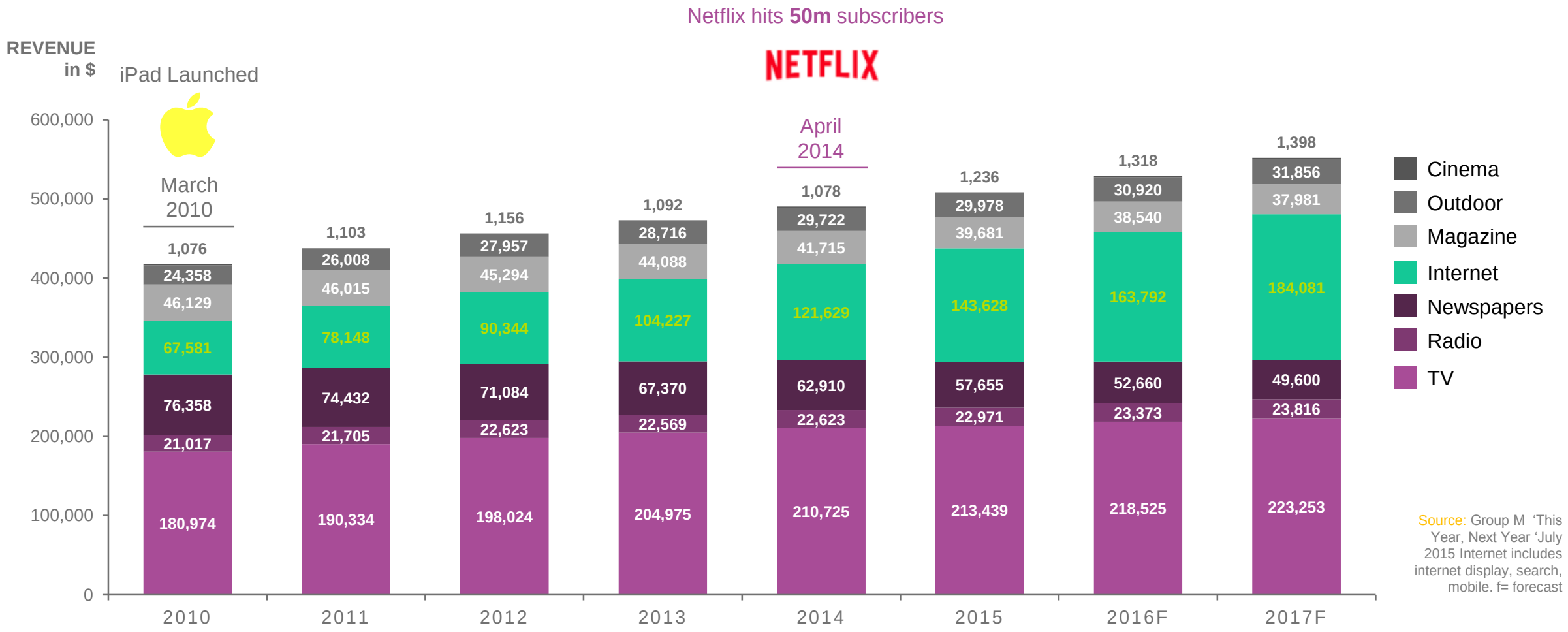
1926 → **2017**

A word describing a single device, designed to receive broadcast television signals, and activity

A flexible fusion of audio visual experiences, delivered to multiple devices, synchronously and asynchronously

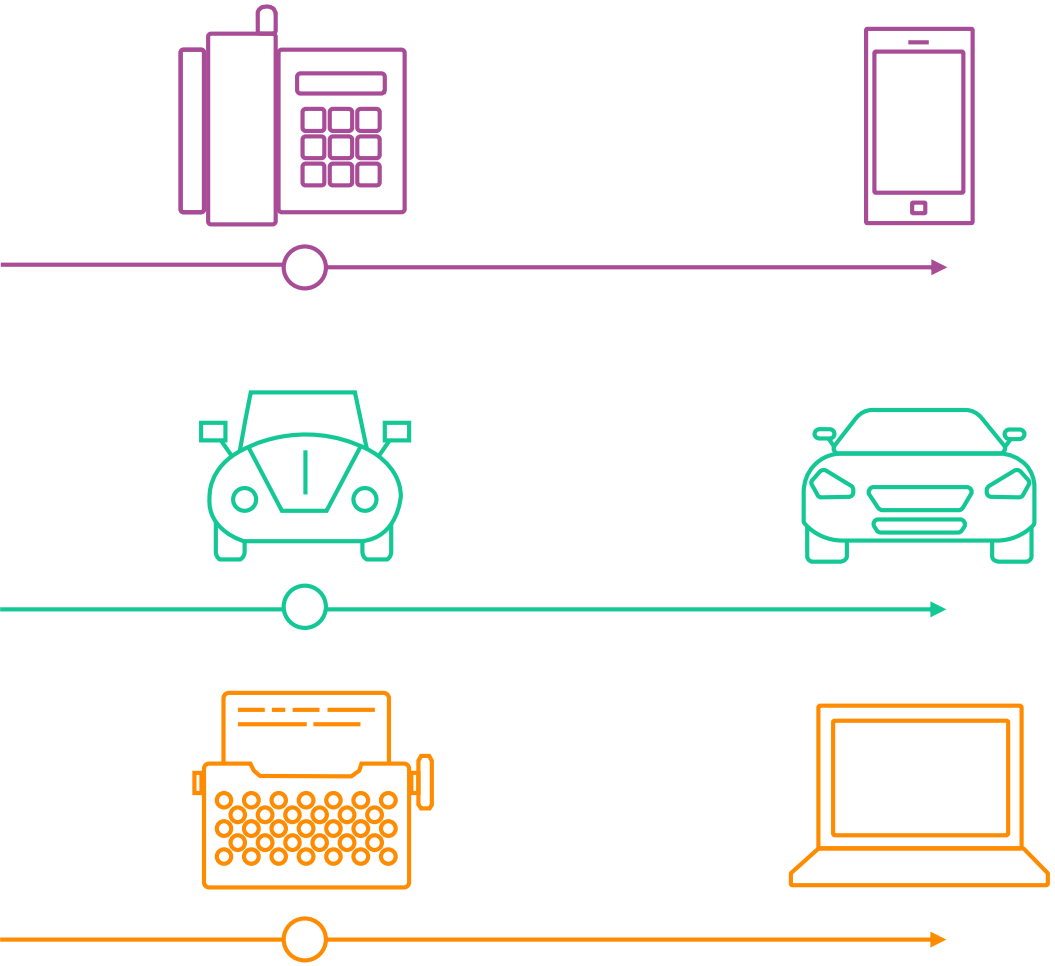
Global Media Industry Revenues : 2012-2016 (f)

TV and video (including digital) continue to be the proven medium



Source: Group M 'This Year, Next Year 'July 2015 Internet includes internet display, search, mobile. f= forecast

Change is All Around



Fox to premiere TV series on Twitter

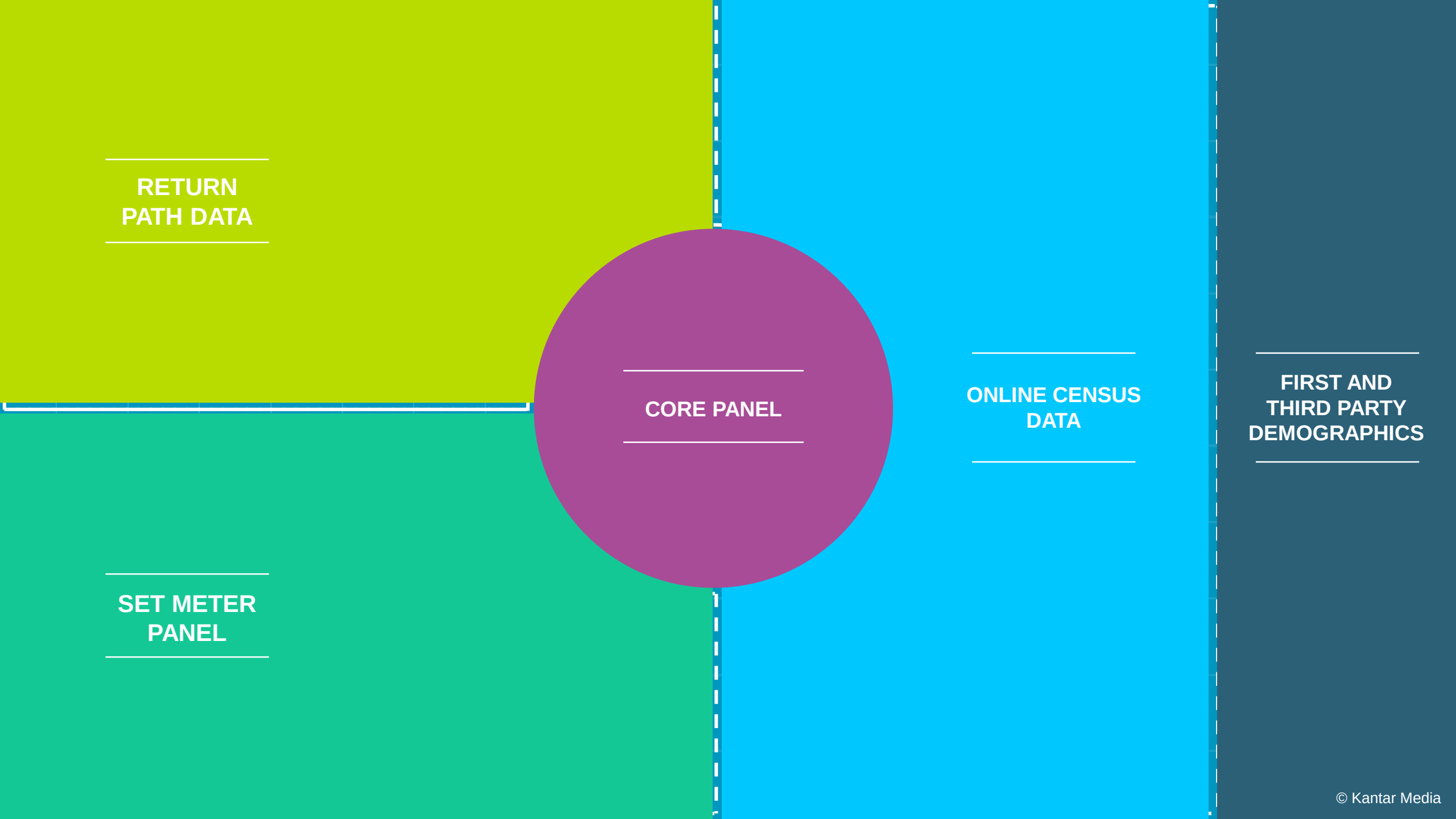
SEPTEMBER 21, 2017 08.56 EUROPE/LONDON BY ROBERT BRIEL

Fox Broadcasting Company and Twitter will partner on a wide range of streaming initiatives to launch returning series *Empire* and *The Mick*, as well as the network's new comedy, *Ghosted*.

Mike Fries: Amazon is our biggest challenger

SEPTEMBER 20, 2017 20:52 EUROPE/LONDON BY ROBERT BRIEL

Cable operators face many challenges, but Liberty Global's Mike Fries names Amazon as the biggest threat to the industry.



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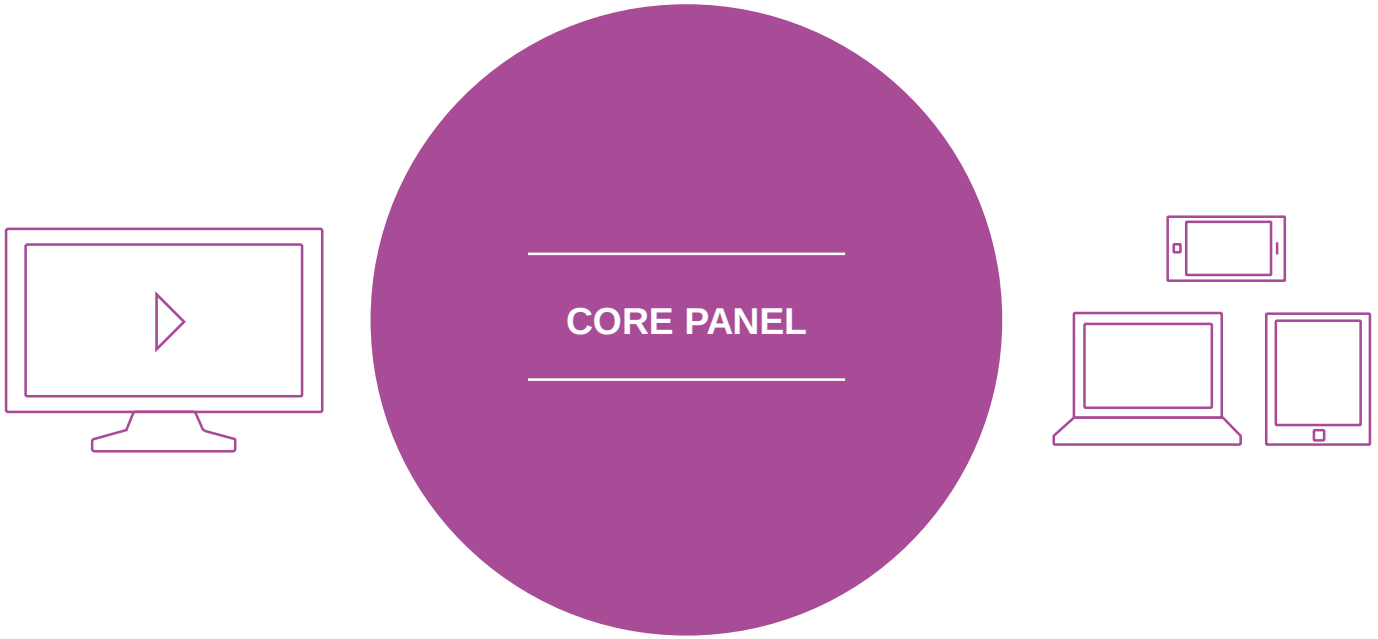
Core Panel

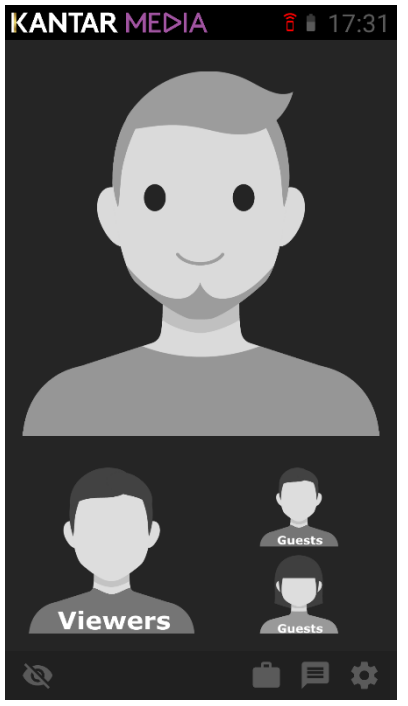
A high quality representative panels remains at the heart of TAM



Core Panel

Core TV continues to be measured with best-in-class PeopleMeter technology

Introducing NextGen PeopleMeter



Future Proof Content Detection Technology

Kantar Media own the industry standards in watermarking and fingerprinting

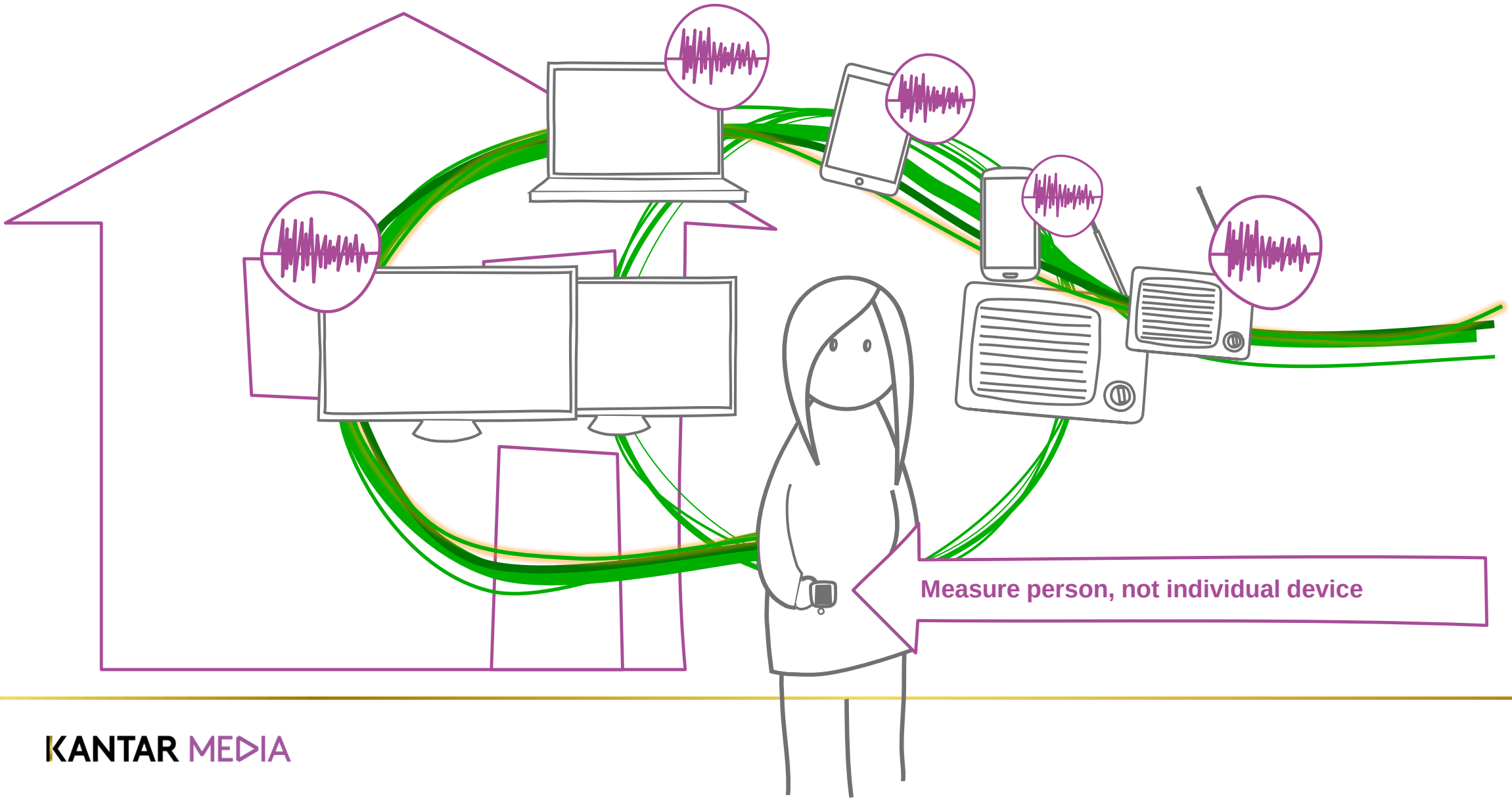
Audio matching (fingerprinting)

- Acoustic pick up of the audio signal
- Better granularity

Audio watermarking

- Channel identification supplemented with Content identification
- Detection and identification of locally inserted Ads

Passive Measurement - Portable Meters



Portable Meters: RateOnAir

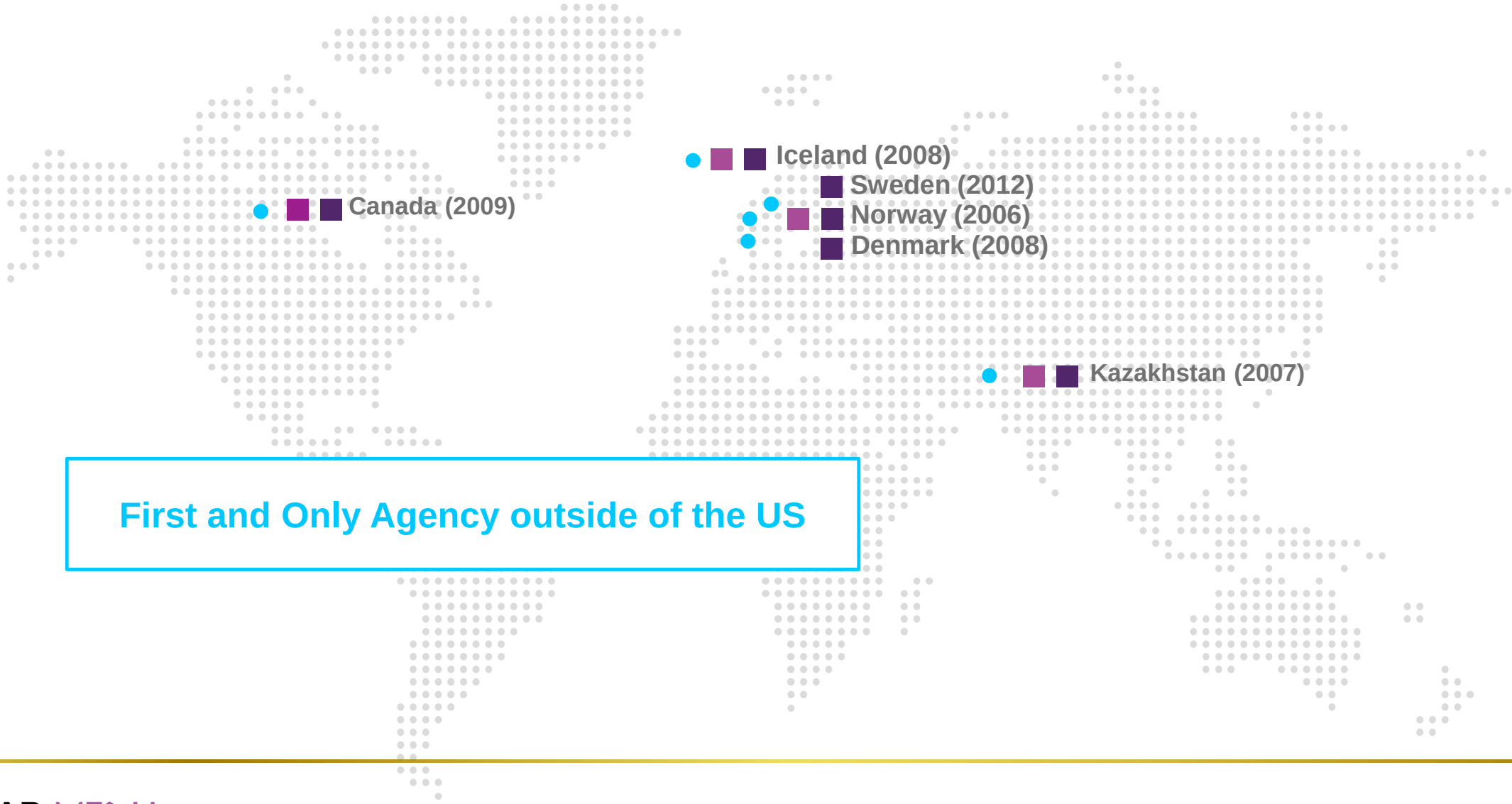
New meter

Location

Headset adapter

Our Experience in Portable Metering

Source: TV Radio



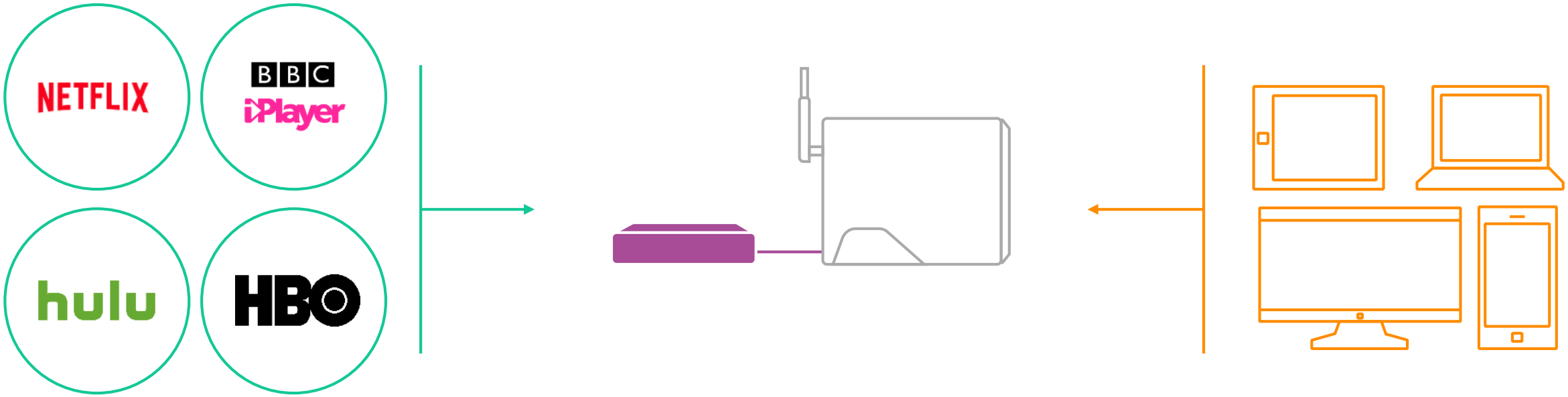
First and Only Agency outside of the US

Extended TV

Measuring all TV and video viewing in the home

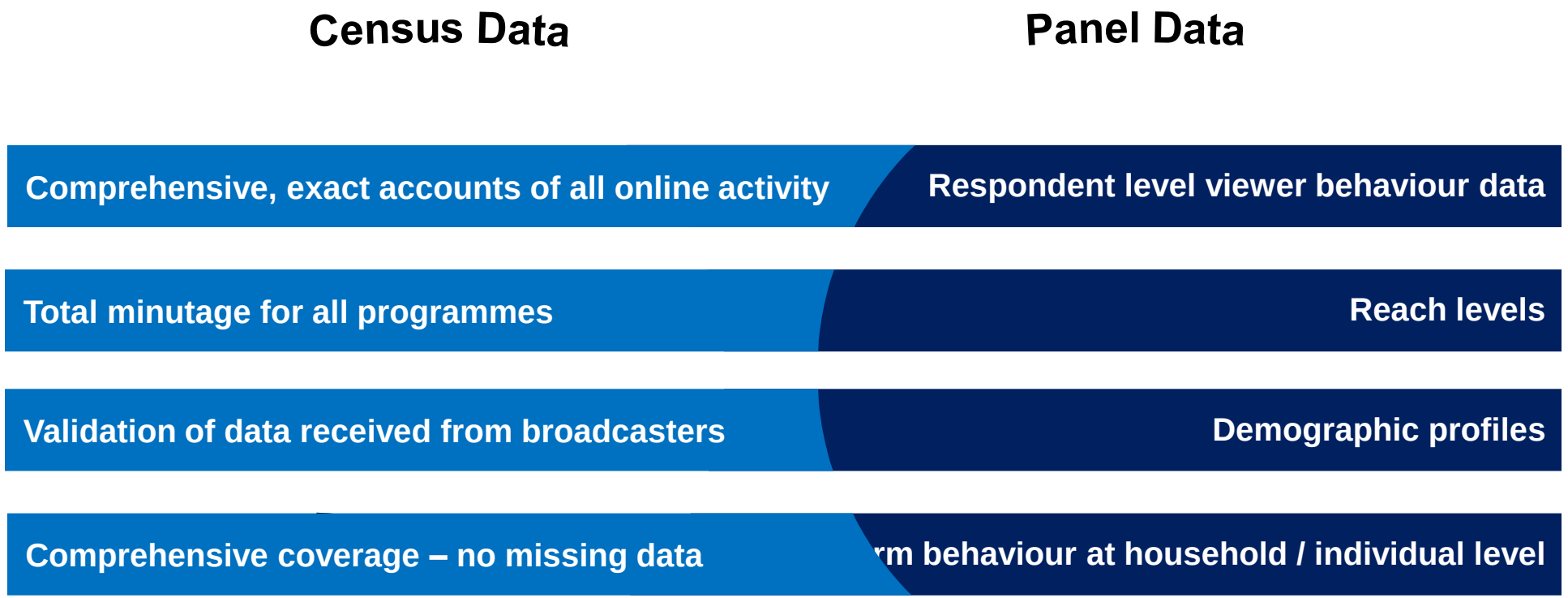
Measuring TV viewing beyond the TV set

FocalMeter has the technical capability to capture time spent viewing across all TV and video platforms

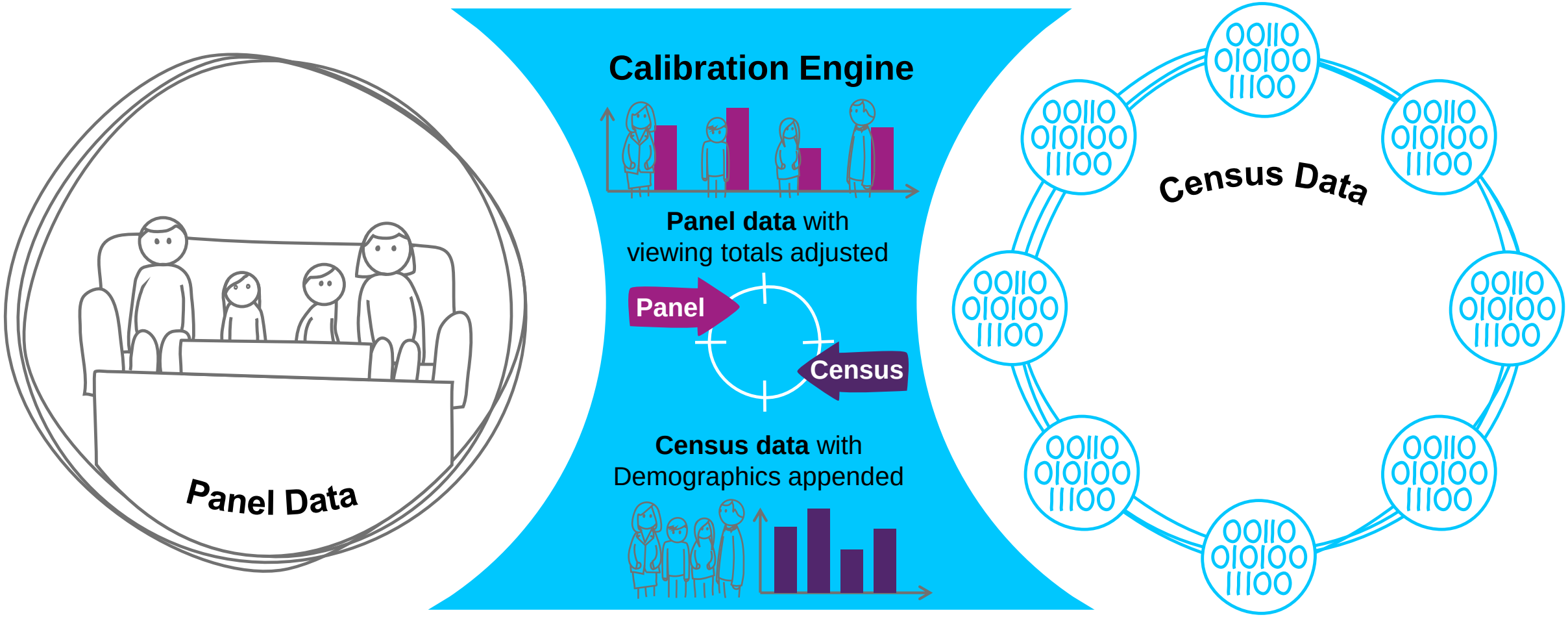


Data Integration

Panel and Census Data Working Together



Data Integration
Combining Panel & Census Data



RETURN PATH DATA

SET METER PANEL

CORE PANEL

ONLINE BOOST PANEL

ONLINE CENSUS DATA

FIRST AND THIRD PARTY DEMOGRAPHICS

© Kantar Media

Extended TV Measurement

Computer

Tablet

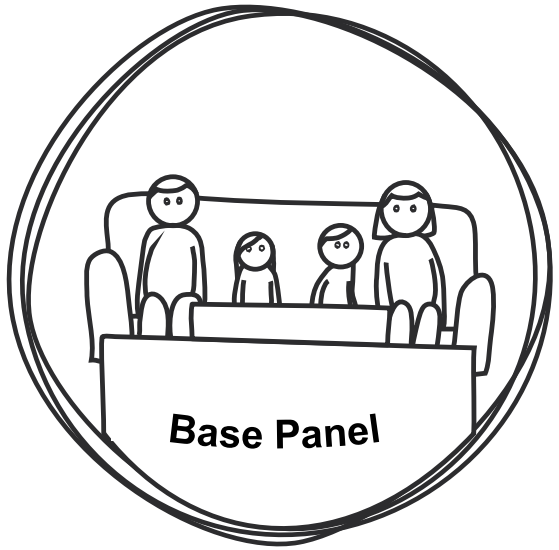
Phone

- Denmark (2013)
- Netherlands (2015)
- Norway (2018)
- Russia (2013)
- Slovakia (2013)
- Spain (2017)
- Switzerland (2016)
- Turkey (2018)
- UK (2013)

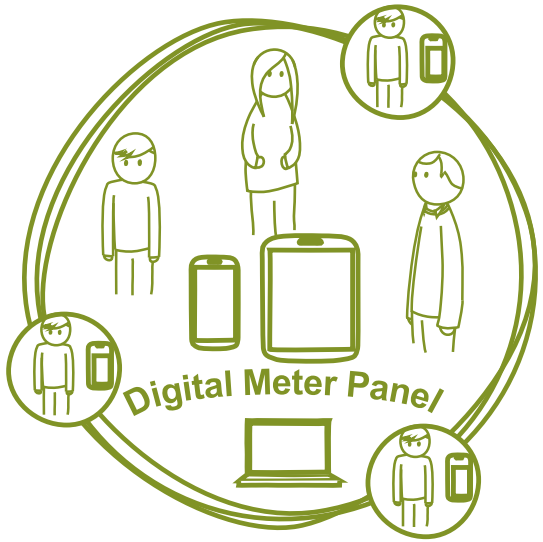
DE MOL

NETHERLANDS

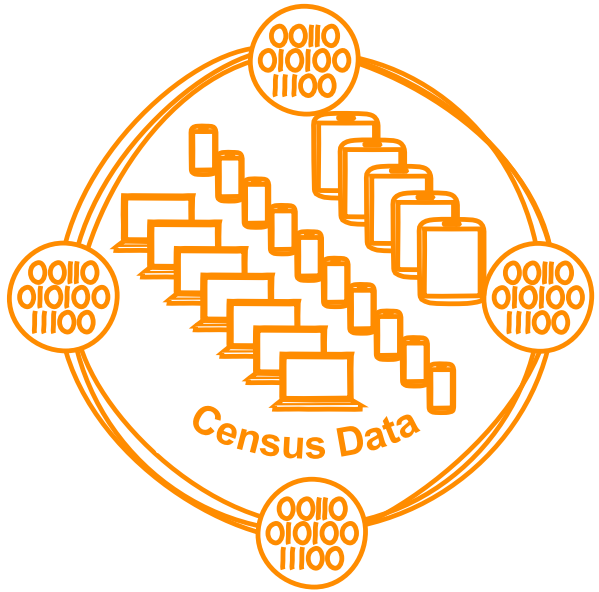
TV Panel
1235 HH ~ 2700 indv.
Run by GfK
Using Kantar Media
5000s meters



Digital Panel
5000 individuals
Run by Kantar Media
Using VirtualMeter



Census Data
Total traffic measurement
Tagged by comScore



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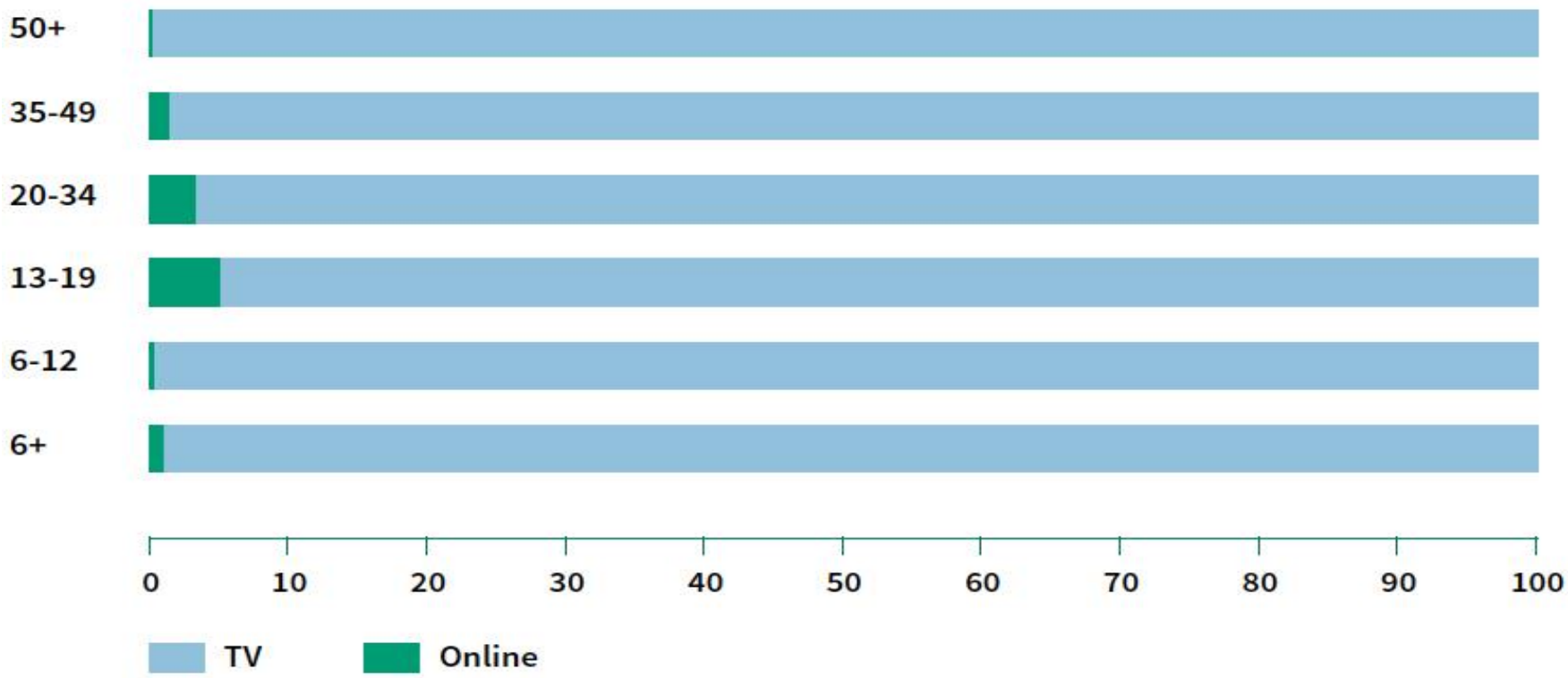
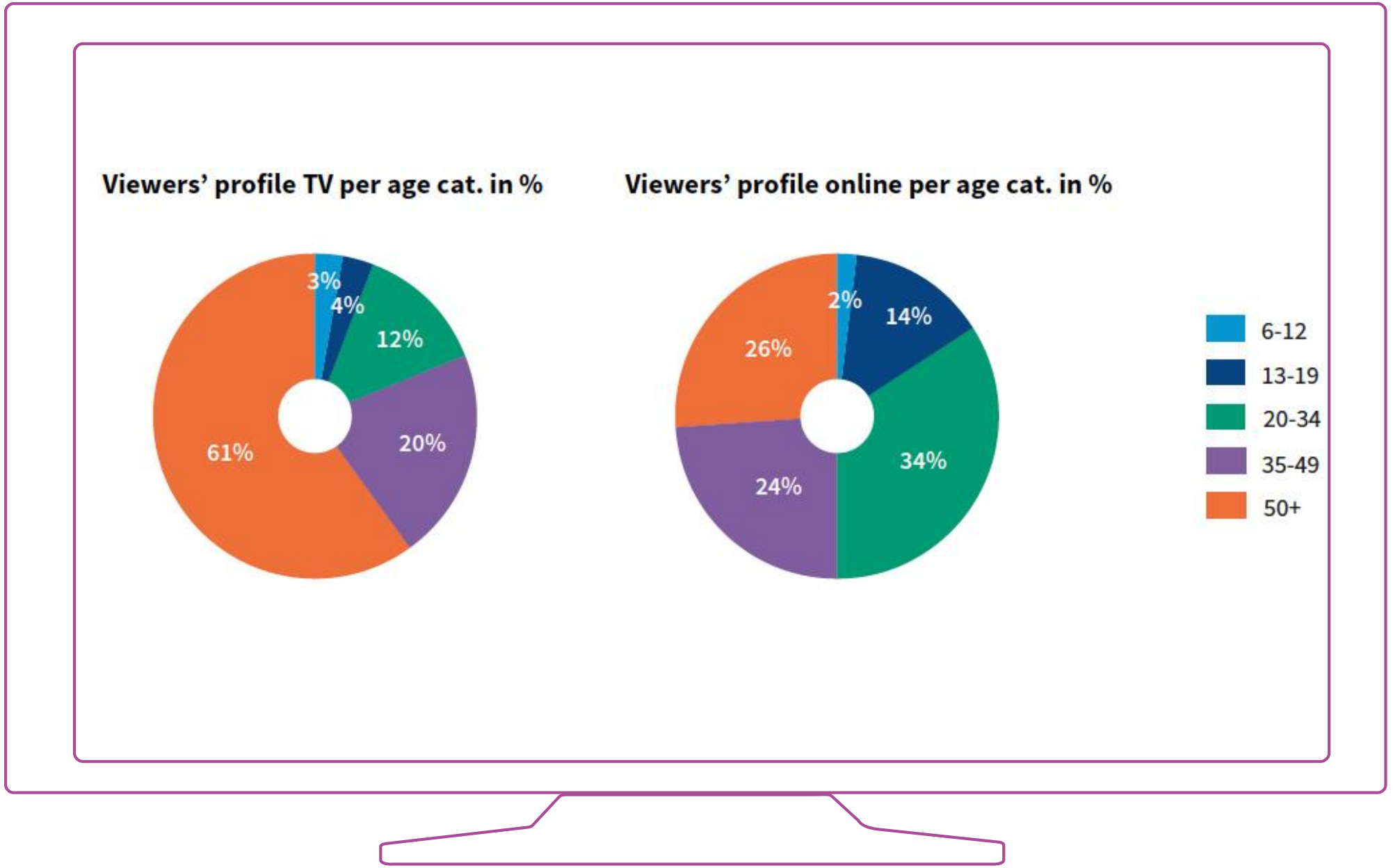
SKO

NETHERLANDS

Share of online and TV viewing time (%) in total viewing time



Source: SKO



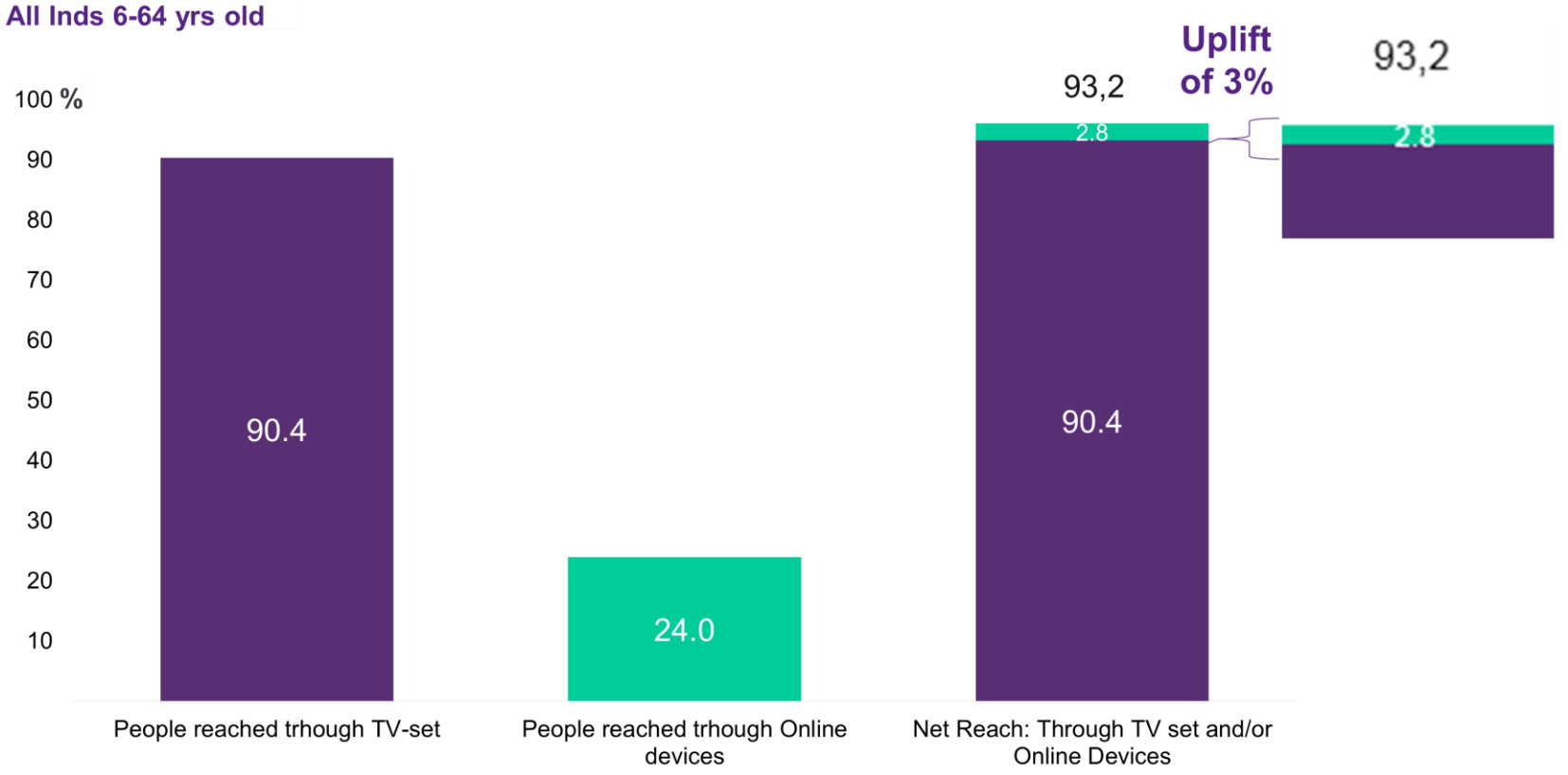
NETHERLANDS

Source: SKO

NETHERLANDS

First Results – The Netherlands

Weekly Reach%: Connected Devices add 3% points – an uplift of 3%

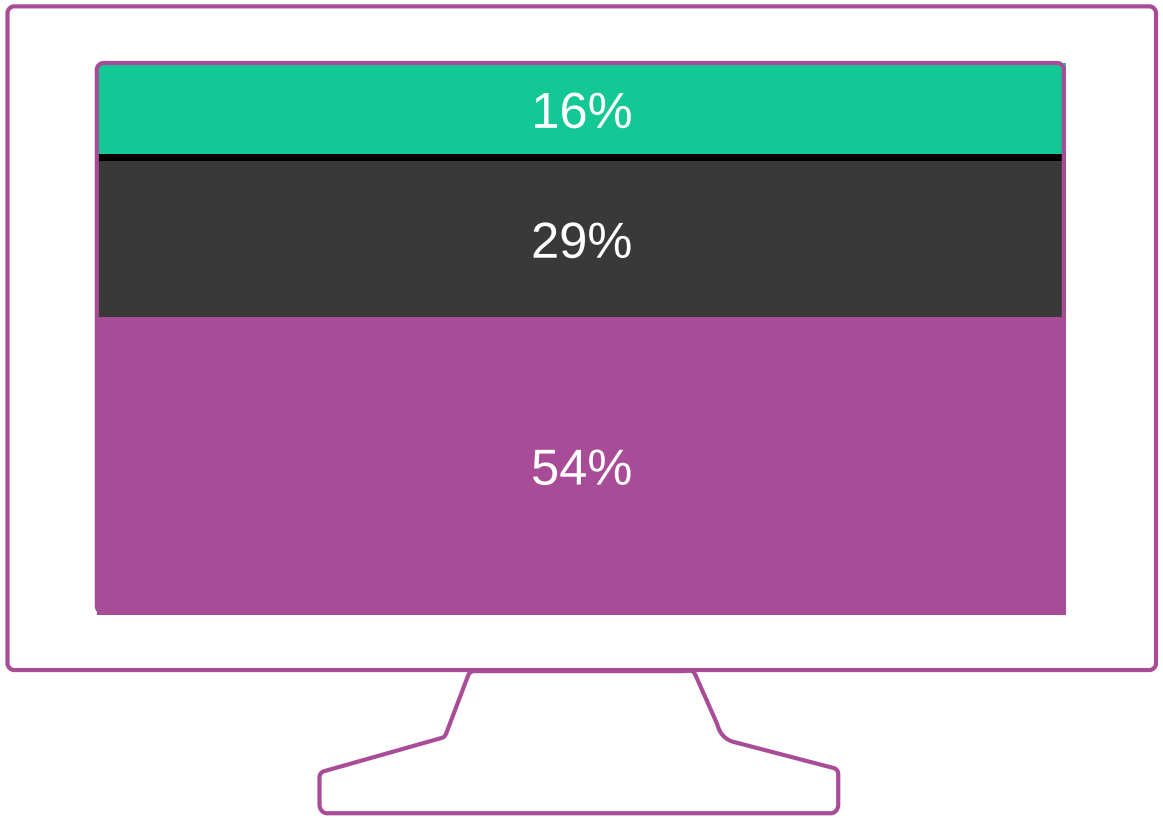


Source: SKO, April 2017

Measuring Extended TV delivers an uplift in viewing for many programmes

NETHERLANDS

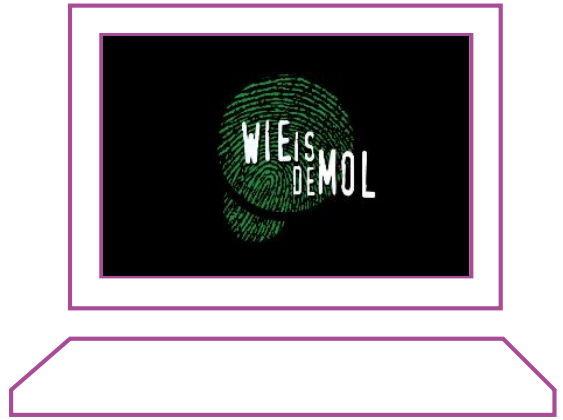
Wi is De Mol (a weekly top 10 programme in the Netherlands)



Online audience
Time-shifted up to 27 days (1%)

Time-shifted up to 6 days

Live audience



Source: SKO. Total average across 10 episodes, 2 January- 5 March 2016

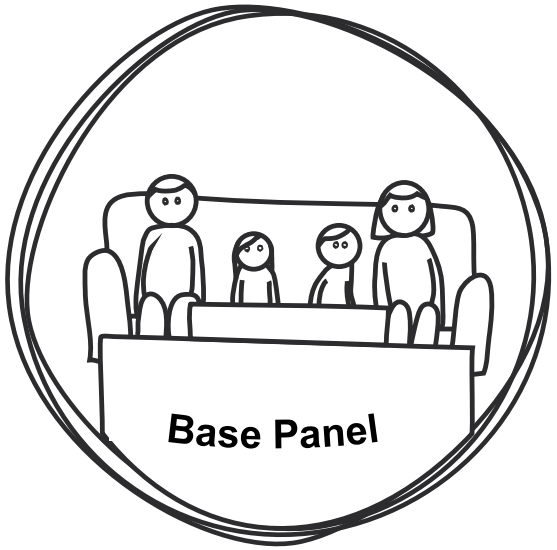
BRON || BROEN

DENMARK

Base Panel

2600 individuals

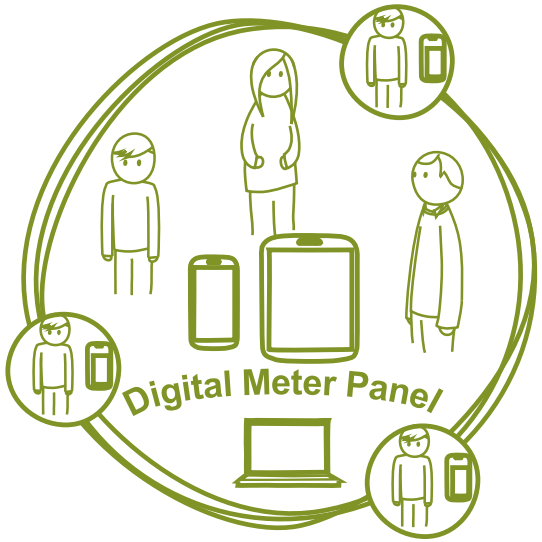
Measures TV-sets & Smart TV



Digital Meter Panel

1000 individuals

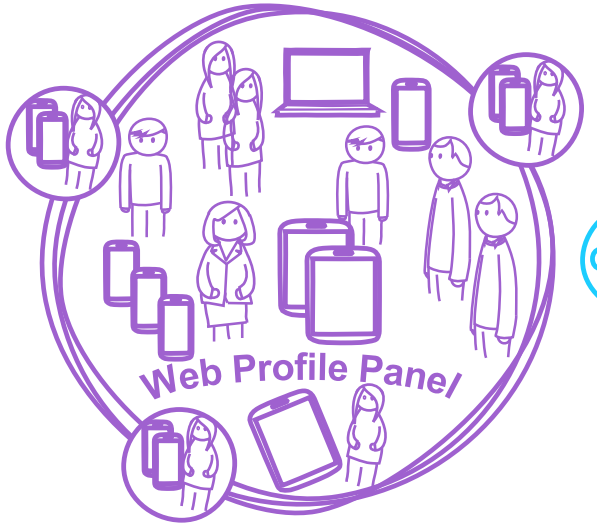
Measures PCs, tablets, Smartphones



Web Profile Panel

28000 individuals

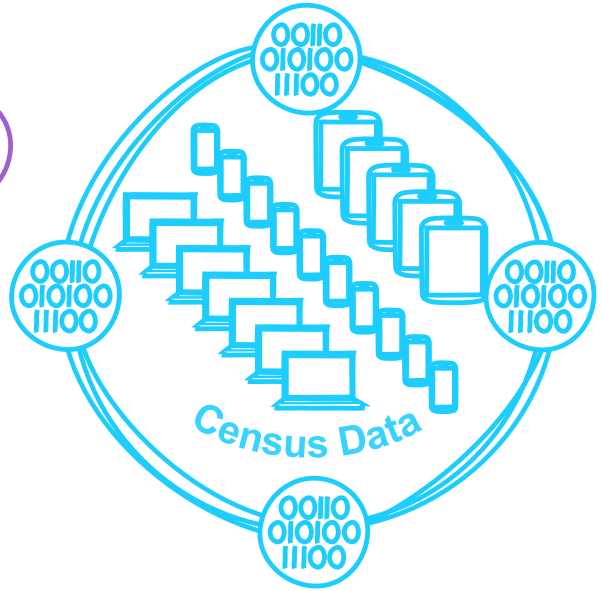
Cookie based, all digital devices



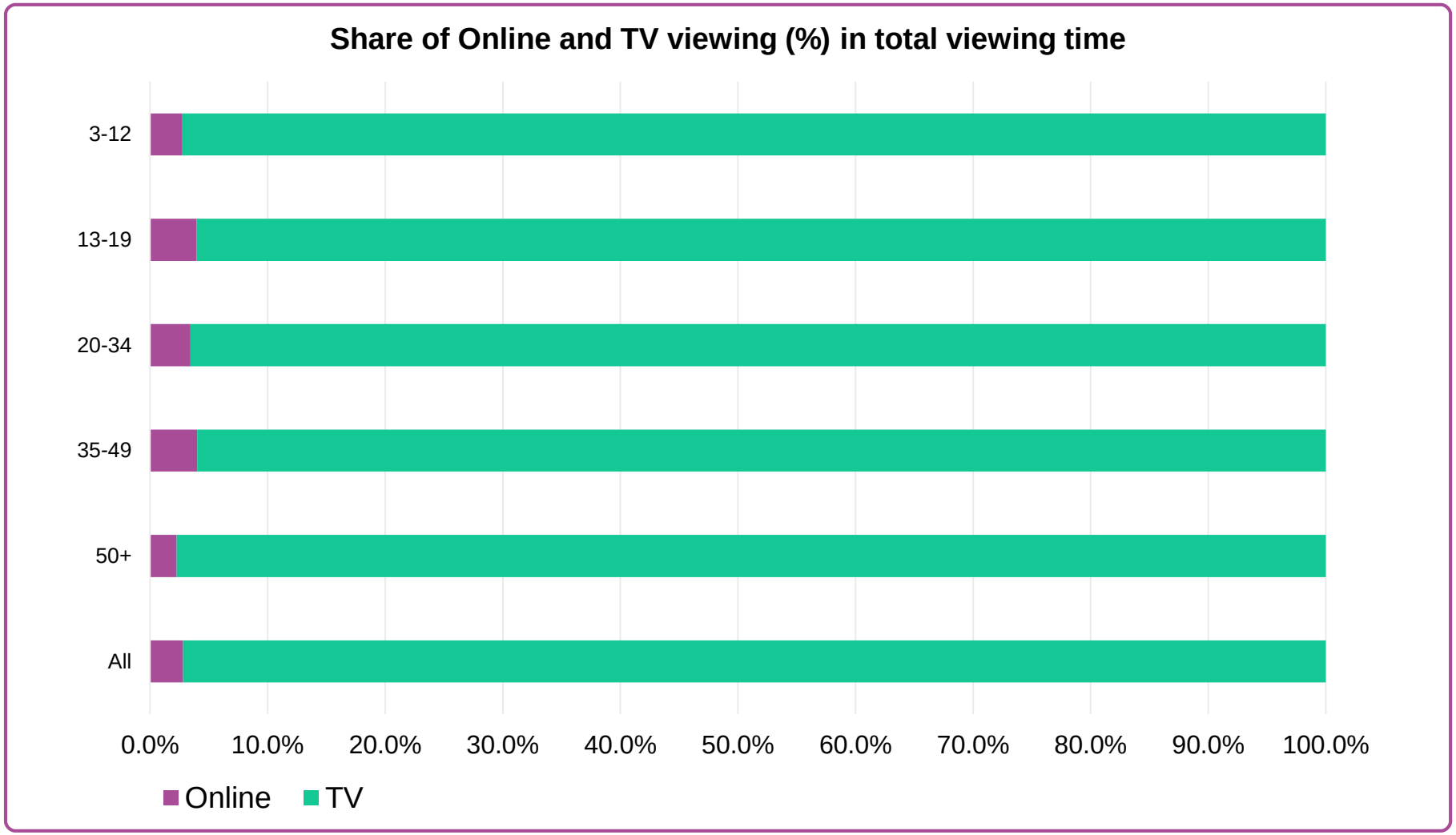
Census Data

Total traffic measurement of all tagged content.

Device level info



DENMARK



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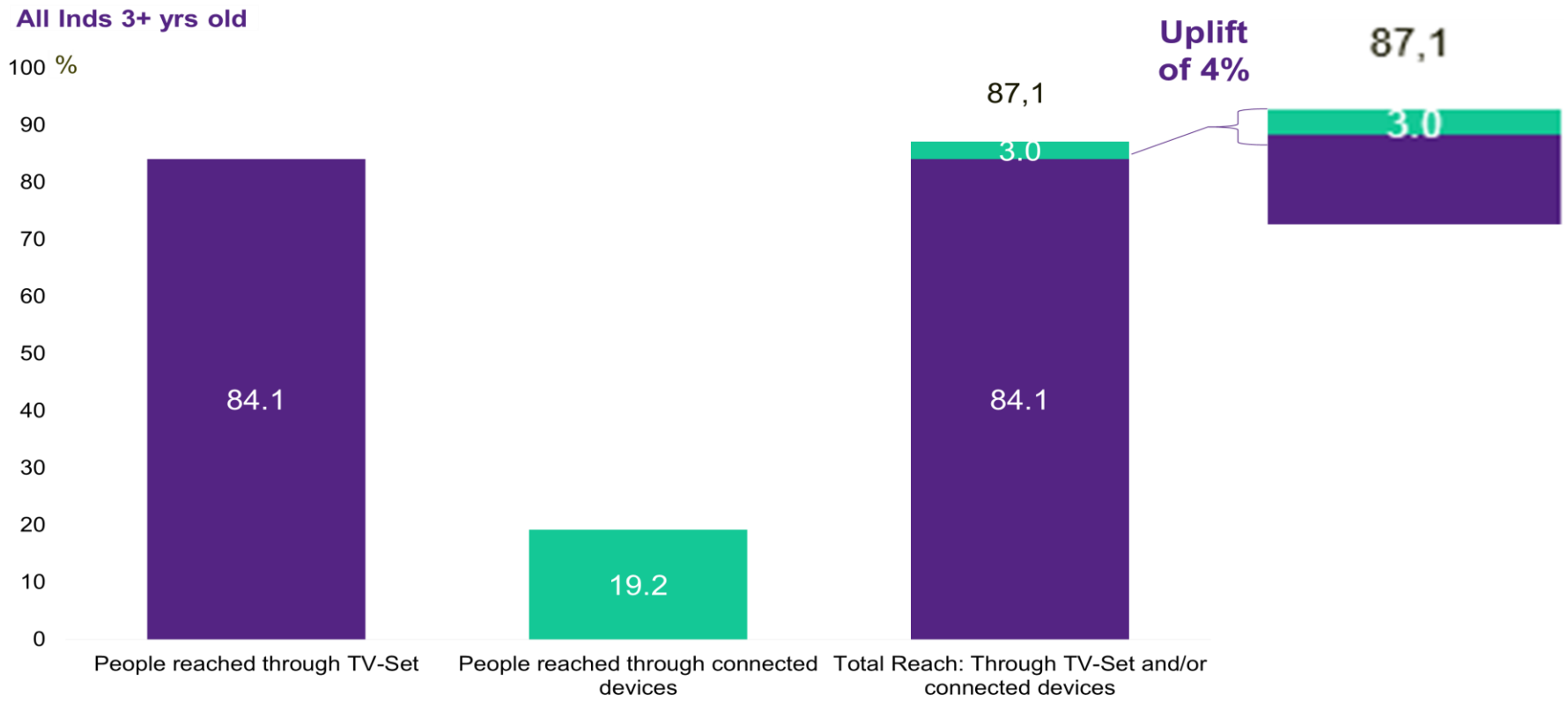
Source: Kantar TNS DK, Jan 2017

DENMARK

First Results - Denmark

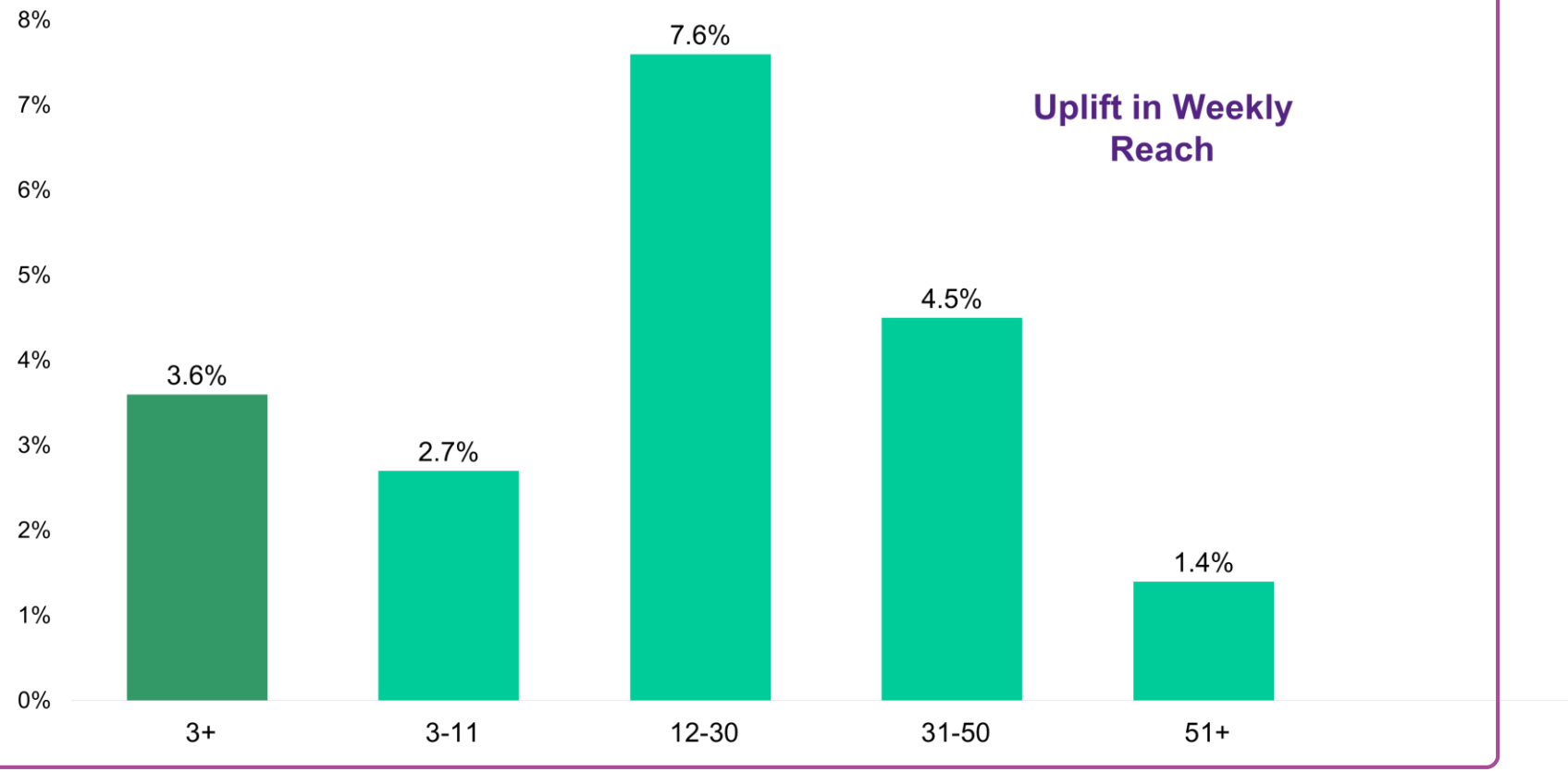
Weekly Reach%: Connected Devices add 3% points – an uplift of 4%



Source: Viewer Survey Denmark
03-09 April 2017

First Results - Denmark

Connected Devices add 8% Uplift among Young People 12-30



DENMARK

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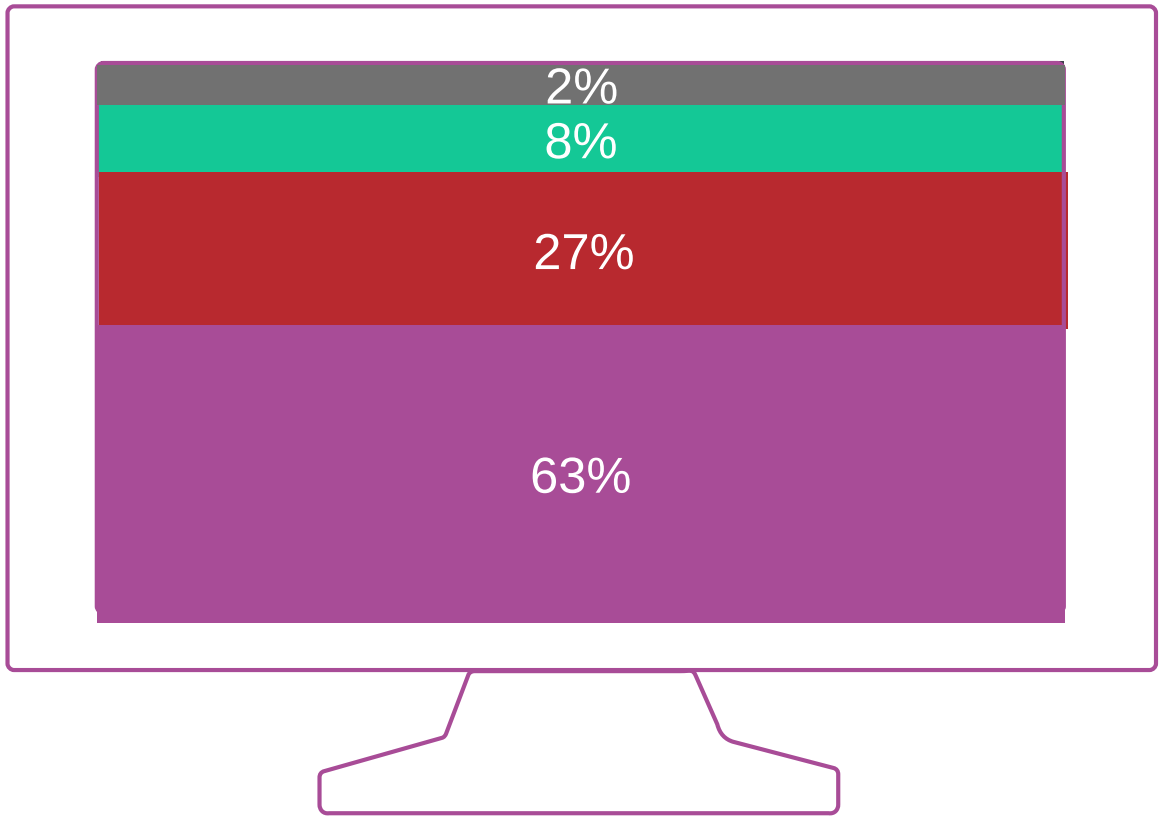
Source: Viewer Survey Denmark
03-09 April 2017

Measuring Extended TV delivers an uplift in viewing for many programmes

DENMARK

Skam, the most popular TV programme online (Jan 2017)



Online audience Smartphones

Online audience Tablets

Online audience PCs

Audience TV sets

Source: Kantar TNS DK, Jan 2017

LEGENDARY
LEGENDARY
LEGENDARY
NOT ALW

RETURN PATH DATA

SET METER PANEL

CORE PANEL

ONLINE CENSUS DATA

FIRST AND THIRD PARTY DEMOGRAPHICS

© Kantar Media

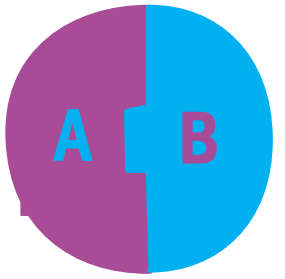
Extended TV Measurement in Norway

NORWAY

	In home	Out of home
Broadcast		
Online		

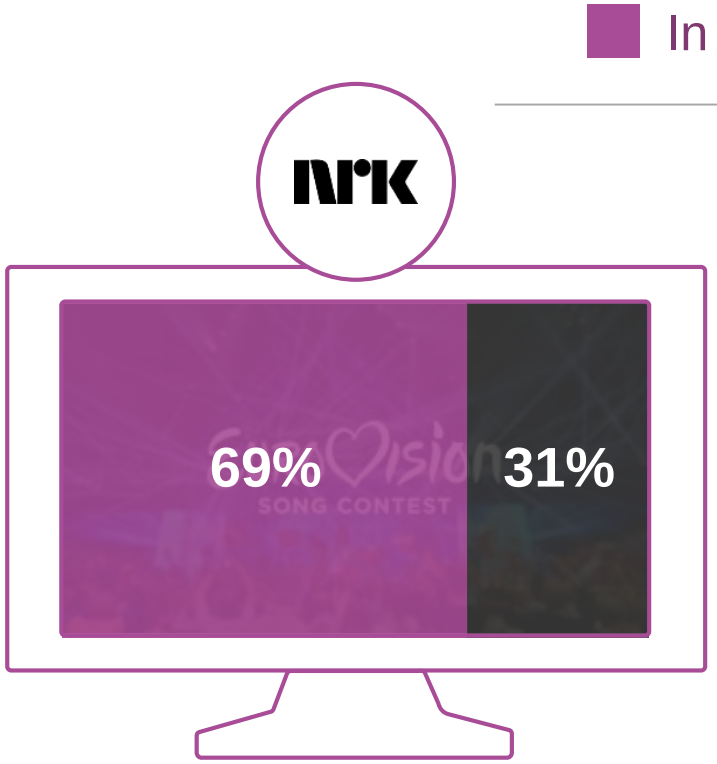
Panel A:
(3000 indv.)

Panel B:
(1500 indv.)



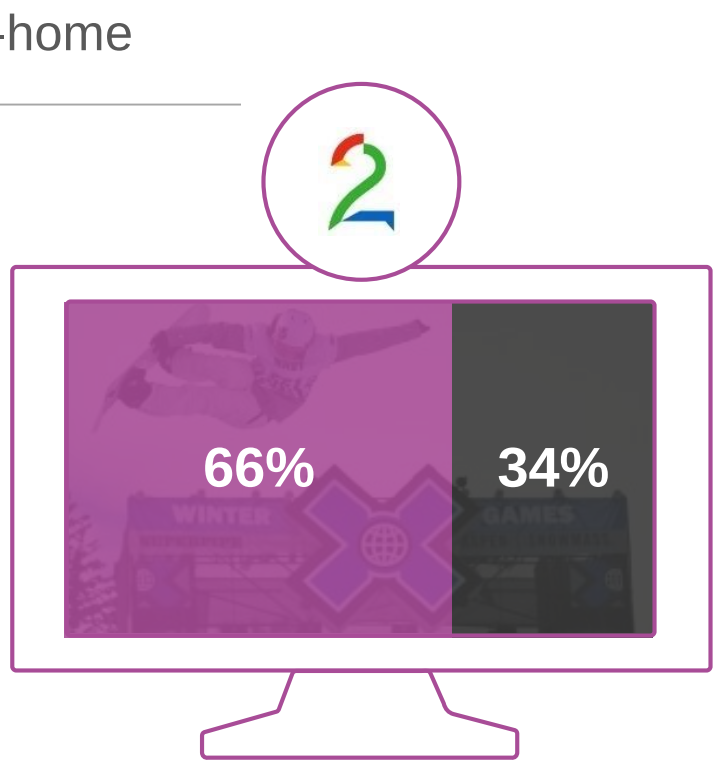
The Power of out-of-home viewing integrated into the currency

Norway has reported out of home viewing since 2014 – Fusing the OOH viewing from their radio PPM panel



Eurovision Song Contest
(Domestic)

1338K
Viewers



X Games
Snowboard, Women

156K
Viewers

RETURN PATH DATA

SET METER PANEL

CORE PANEL

ONLINE BOOST PANEL

ONLINE CENSUS DATA

FIRST AND THIRD PARTY DEMOGRAPHICS

© Kantar Media

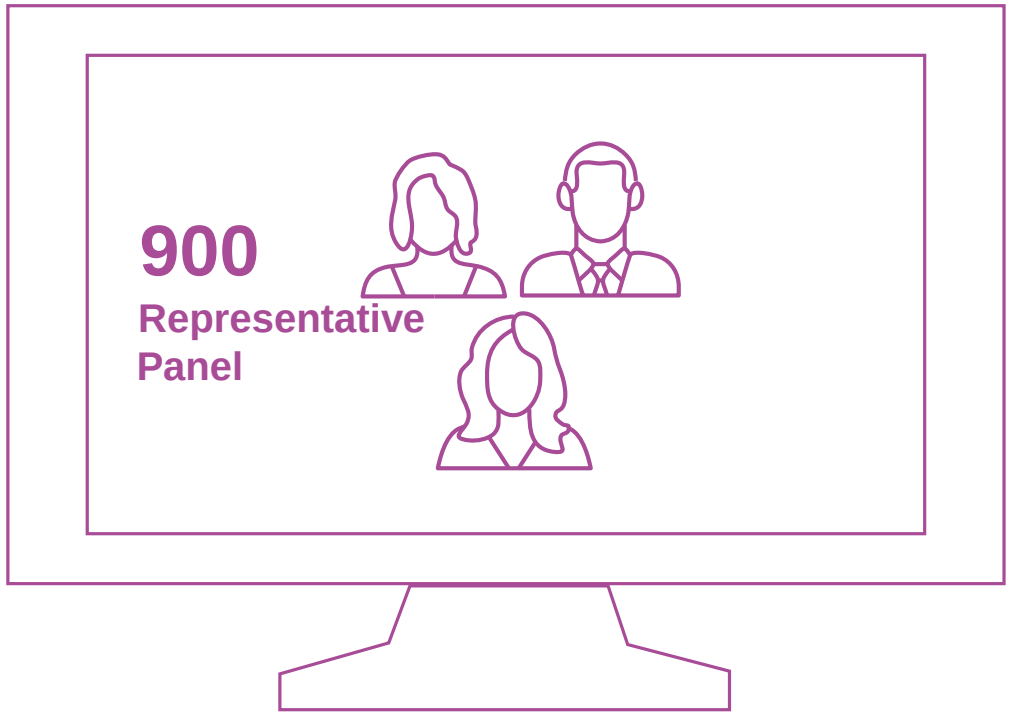
TV measurement using the return path from 21,500,000 households

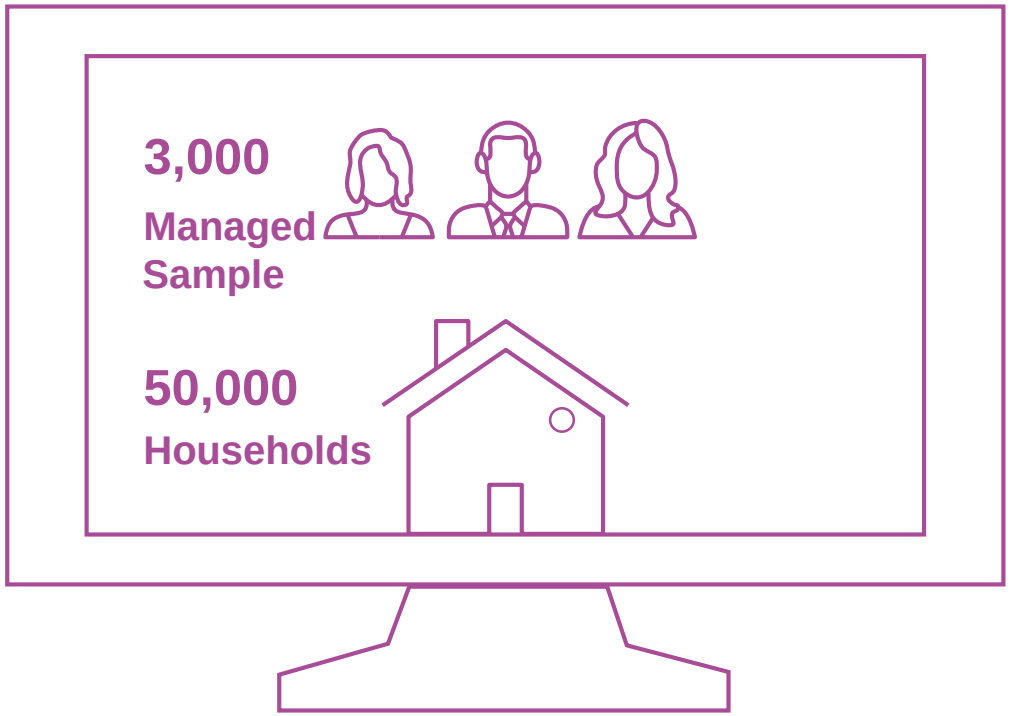
sky
DSTV
COMCAST
dish
CABLEVISION
verizon
Singtel
Google fiber
suddenlink
astro
ARMSTRONG
DIRECTV
movistar
frontier
MetroCast
PCCW
at&t
TATA Sky
Mediacom
FOXTEL
COX COMMUNICATIONS
Charter
ONO
TIME WARNER CABLE
Midcontinent
ATLANTIC broadband
HARGRAY
WOW! INTERNET AND CABLE

Integrating viewing data from PeopleMeter and Return Path data technology

Pilot in Pakistan shows the value that return path data can add to the Total TV viewing.

PAKISTAN

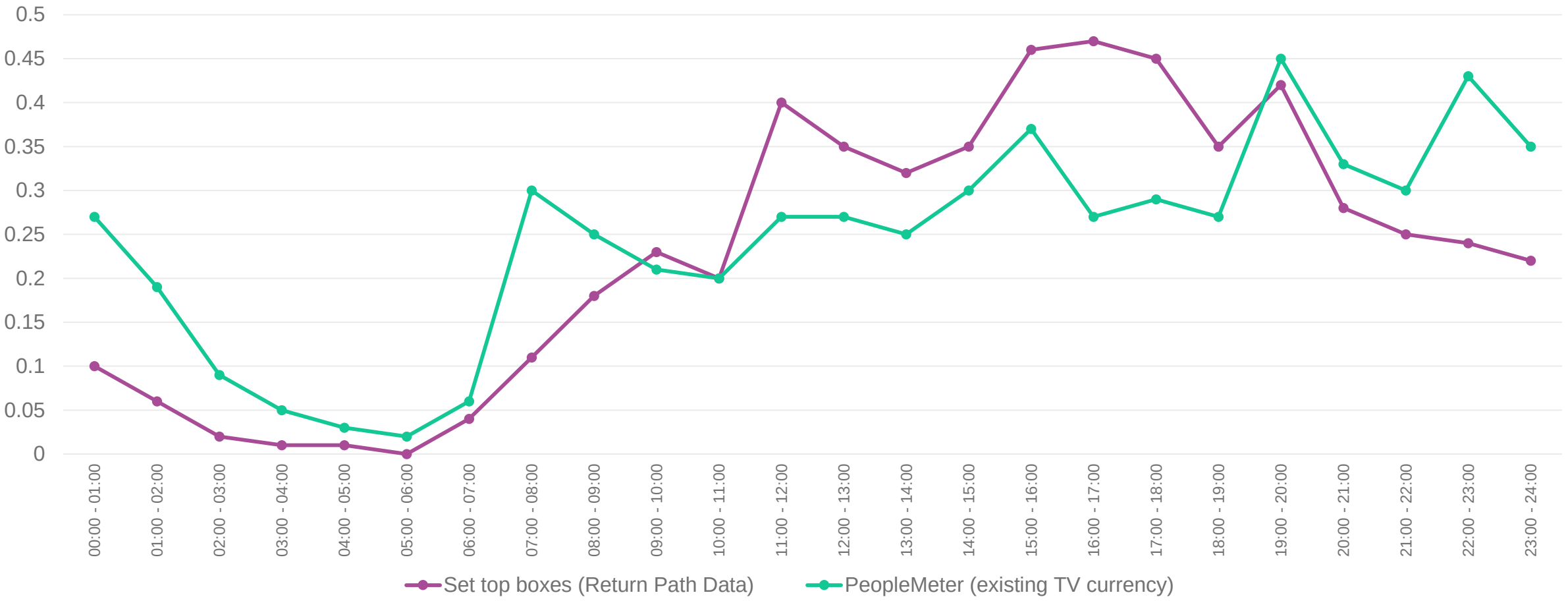




Integrating viewing data from PeopleMeters and Set top boxes

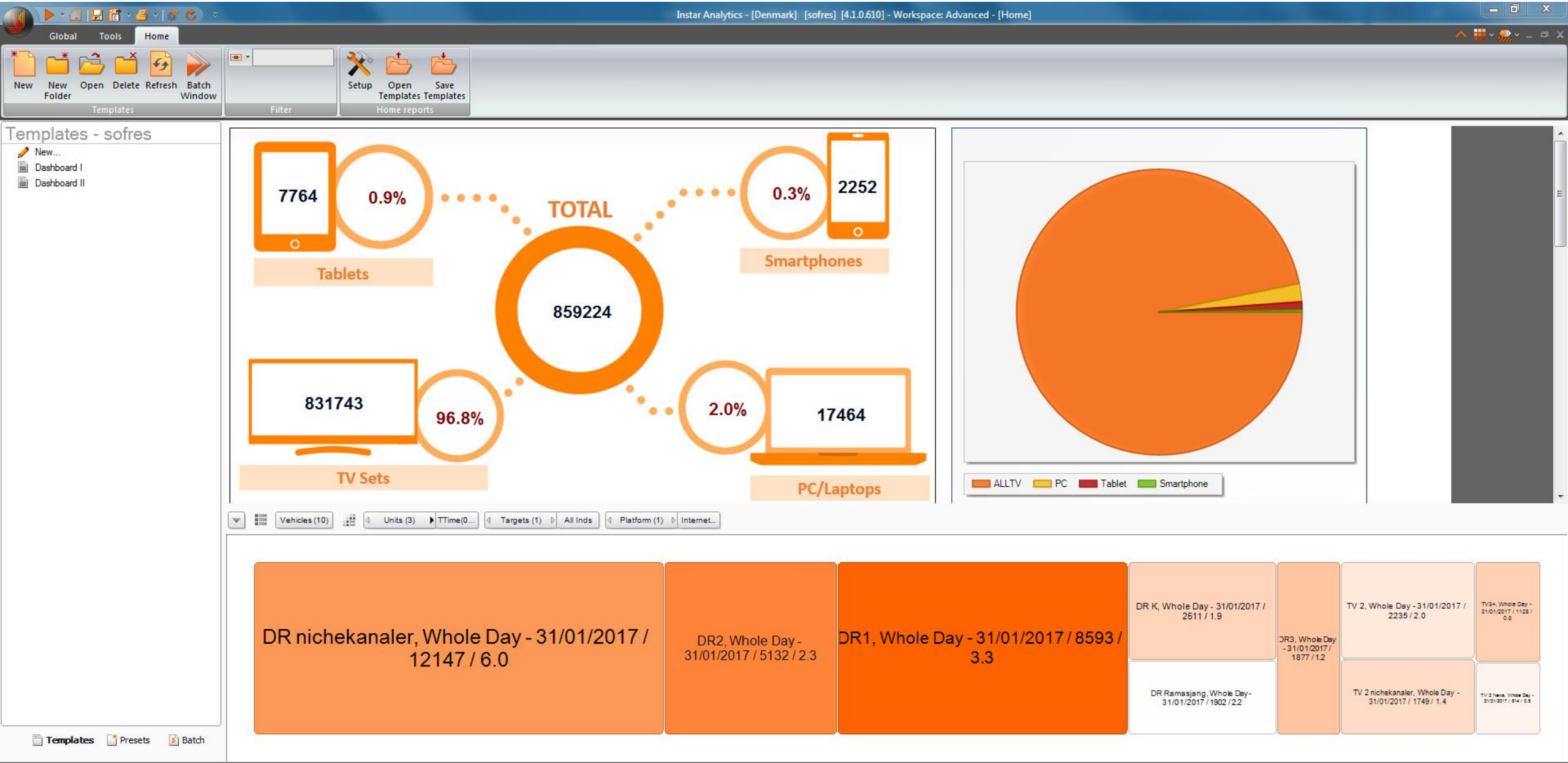
Pilot in Pakistan shows the value that return path data can add to the Total TV viewing.

PAKISTAN



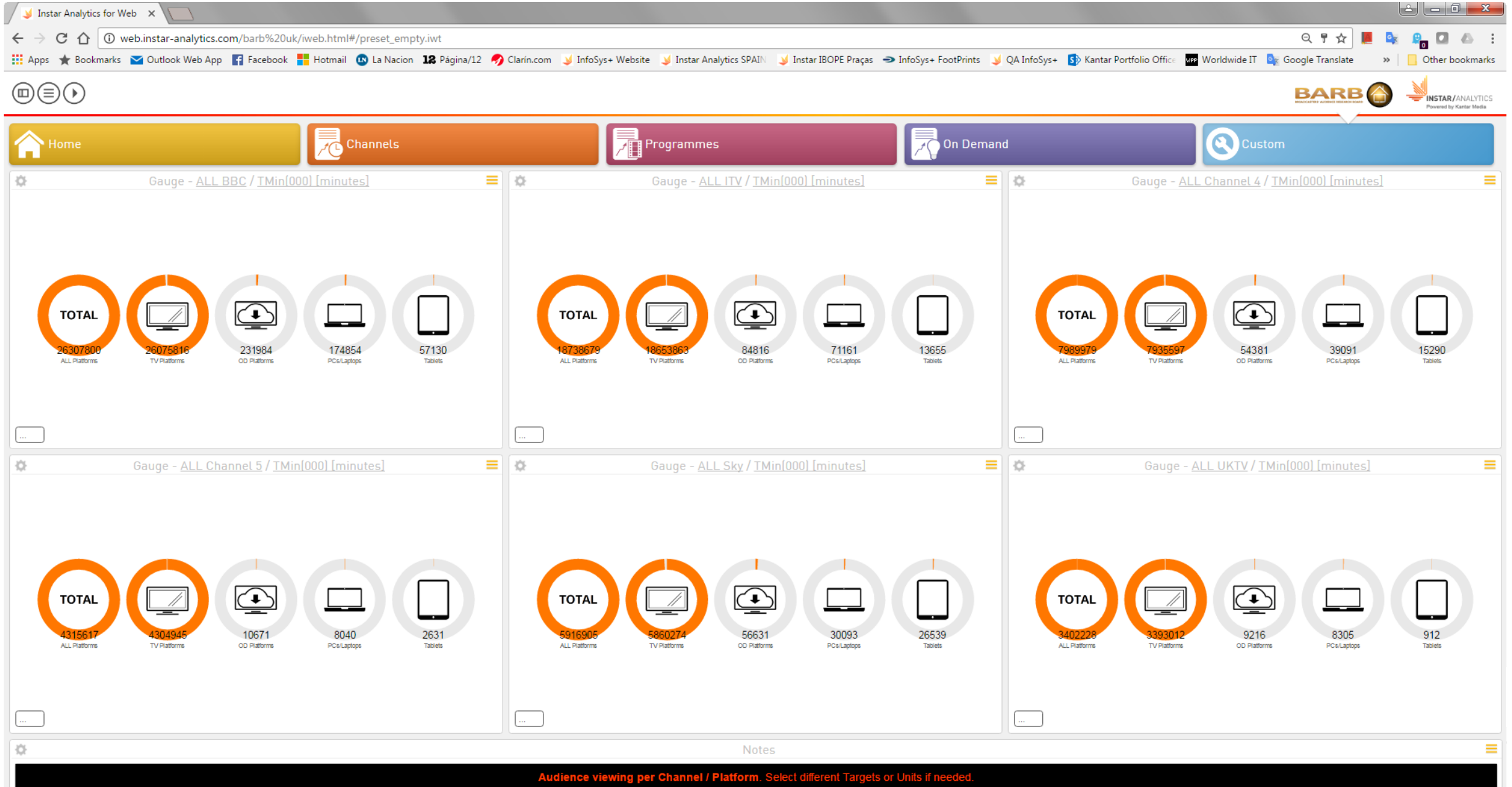
Reporting of Extended TV Measurement

Home Page: Viewing composition by Platform, and Treemap by streaming Player



Reporting of Extended TV Measurement

Player audience composition by Platform



RETURN PATH DATA

SET METER PANEL

CORE PANEL

ONLINE CENSUS DATA

FIRST AND THIRD PARTY DEMOGRAPHICS

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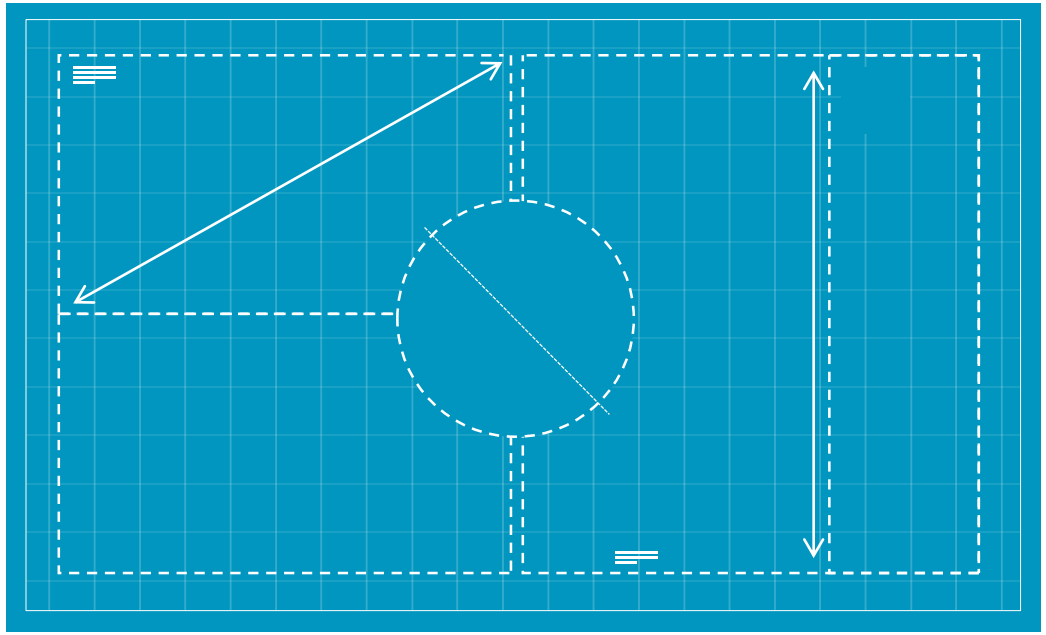
+28

Extended time-shift

Cross-media measurement

Real time ratings



Buy & why

Programmatic API

Audience engagement

About Kantar Media

Kantar Media is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Part of Kantar, the data investment management arm of WPP, Kantar Media provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at www.kantarmedia.com

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