UPDATE ON GLOBAL CROSS-PLATFORM MEASUREMENT:
Fusion vs. Single Source around the World
Audience intelligence in 57 markets

North America
- Canada
- USA

Latin America
- Argentina
- Brazil
- Chile
- Colombia
- Costa Rica
- Ecuador
- Guatemala

Europe
- Denmark
- Estonia
- Finland
- France
- Germany
- Georgia
- Iceland
- Kazakhstan
- Latvia
- Lithuania
- Netherlands
- Norway
- Portugal
- Romania
- Russia
- Slovakia
- Spain
- Switzerland
- Sweden
- UK

Asia & Australia
- China
- Hong Kong
- India
- Indonesia
- Malaysia
- Mongolia
- New Zealand
- Pakistan
- Philippines
- Singapore
- South Korea
- Sri Lanka
- Thailand
- Thailand
- Vietnam

Middle East & Africa
- Angola
- Egypt
- Israel
- Kenya
- Nigeria
- South Africa
- Turkey
- United Arab Emirates
From TeleVision to TotalVideo
TV to Total Video
One size does not fit all…
Not forgetting real time ratings…
Models for Cross-Media Measurement
Cross Media Model B: + Single Source

- Panel-informed
- Census
- Demographics

Online Panels

- Apps Tags
- Page Tags
- TV Video Tags
- Non-TV Video Tags
- Server-Server

Internet Currency

Fusion & Calibration

Cross Media

Model B: + Single Source

TV Panel

TV Currency

Single Source Overlap

PC & Mobile Virtual Meters on Subset of TV Panel + option of Total Home (Focal) Meter
Breaking New Ground
Cross-media measurement case studies
The UK
The TV Player Report
First cross-broadcaster measure of online player consumption

- Each broadcaster had their own internal metrics.
- Some publish them. Most did not.
- All their metrics were slightly different.
- For the first time we were able to see the players side by side on a like for like basis.
The TV Player Report
How does it work?

Broadcasters implement our tags, to our specification. The implementation is audited independently.
Total viewing time
the total number of minutes that devices have received content.

Average programme streams
meant to be the device equivalent of average audience. It takes the total playtime and divides it by the duration of the programme to give the average number of devices viewing in a minute of the programme.
The Night Manager
Final episode (27 March 2016)

47% of the viewing came from Live.
On Demand adds 5% to the total viewing, less than time shift 8-28 days

Note: on demand figures are estimated based on Average Programme Streams for the episode multiplied by 1.5 to estimate people from the devices
Britain’s Got Talent
Season 10 final (28 May 2016)

Watched Live by 69% of the viewers.
On Demand contributes with 2% to the total viewing

Note: on demand figures are estimated based on Average Programme Streams for the episode multiplied by 1.5 to estimate people from the devices

Source: BARB
*Estimated rating based on census data
Data integration
Combining Panel & Census Data

Calibration Engine

Panel data with viewing totals adjusted

Census totals with Demographics appended

Panel

Census

Census Data
Calibration principle

Adjust the panel so that viewing, demographic and reach targets are met

Calibration Targets using Census Data

Panel

Calibrated Panel

Targets met
Usage behaviour
Increased granularity
Corrected reach
Demographics respected
Soft targets met
Norway
ContentID

- Unique identifier for programmes and spots
- Included in tags for linear and On Demand content
- Included in linear transmission logs
- Enables summaries across time, channels, platforms and publication forms.
Kantar Media Audio Watermarking Technology Selected For Next Step in SMPTE Standardization To Bind IDs to Media Assets
FEBRUARY 16, 2017
Availability of open, standardized approach to binding IDs to ads and program content marks potential milestone for advancement of cross-platform measurement.

NEW YORK — Feb. 16, 2017 — Kantar Media’s audio watermarking technology for binding Ad-IDs to commercials and Entertainment ID Registry (EIDR) codes to programming content has been selected to move to the next step in the standardization process of the 24TB Open-Source Watermarking Group of the Society of Motion Picture and Television Engineers® (SMPTE®).

SMPTE is the organization whose standards work has supported a century of technological advances in entertainment technology.

The recommendation was made today by a committee comprised of Ad-IDs, a joint venture of the Association of National Advertisers (ANA) and the American Association of Advertising Agencies (4A’s); EIDR, an industry association operating a registry of over 1 million unique, global identifiers for digital entertainment assets, including motion pictures, and television content; and The Coalition for Innovative Media Measurement (CIMM), whose members represent leading content owners, large advertisers and media buying agencies.

The ability to encode standardized identifiers throughout the media ecosystem will have a significant impact on the efficiency of cross-media workflows for ad agencies, media companies, and marketers. It will enable...
Extended time-shift

Cross-media measurement

Real time ratings

Buy & why

Programmatic API

Audience engagement
Proprietary model e.g. Google UK
A reminder about what the panel is

1,000 ‘Gold’ homes
and 2,000 from Kantar WorldPanel

All household members

All TVs

All internet connected devices
Google analyses the web data, Kantar the TV data

UK Cross-Screen Panel
A single source research panel operated by Kantar and Google

A single view of TV and Internet usage

Cross-screen media usage from 3,500 UK online households
The web meters

Router
in-home http traffic & devices

Mobile apps
Android & iOS

Browser extensions
- Internet Explorer
- Chrome
- Firefox
A few words about progress towards change
Everything is measurable…
Barriers to adoption of cross media audience measurement

Legacy business models – why change if it ain’t broken

Sicker shock for digital measurement ie, the ratio of measurement cost to incremental audience/ad dollars

When discussing investment in digital, forgot to mention Investment in measurement?

Technical gatekeepers
The “Inappropriate question”? Facebook and Google

Both are buying TAM data and have active dialogues with us about cross platform measurement

With one or two exceptions they have not been measured in the “TAM system” and are feeling left out

The solution is probably that they need to move in the direction of the TV stakeholders if they want to be included – ie. accept metrics that currently apply in the field of TV measurement

The issues with video reporting in the last year will only have served to push them closer to the measurement companies and the JIC’s
Summary

There is no single model that works for all markets

The variables that might impact the model chose will be economic and recognise local availability of panels

The new technologies by which content and ads are distributed will continue to fragment the measurement business such that solutions will by definition be hybrid

The future for the measurement of video across platforms has never been more exciting (both in terms of head counting and advanced targeting)
THANK YOU!