

## UPDATE ON GLOBAL CROSS-PLATFORM MEASUREMENT: Fusion vs. Single Source around the World





**6,000+**  
employees

**32,000**  
clients

Tracking  
**3 million**  
brands

# Audience intelligence in 57 markets

## North America

Canada  
USA

## Latin America

Argentina Mexico  
Brazil Panama  
Chile Paraguay  
Colombia Peru  
Costa Rica Uruguay  
Ecuador Venezuela  
Guatemala

## Europe

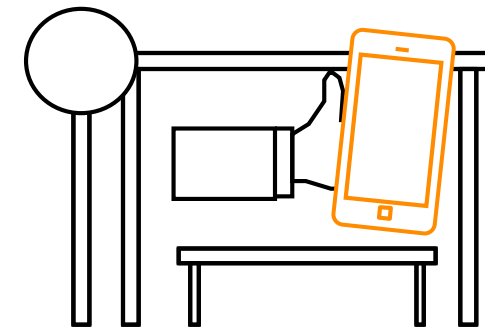
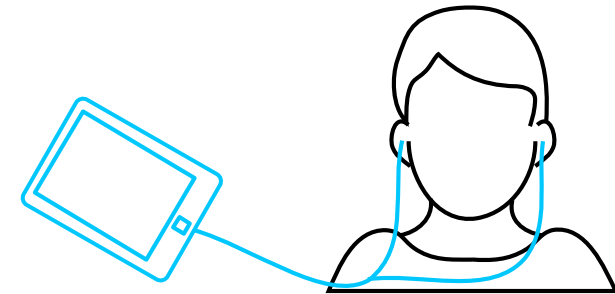
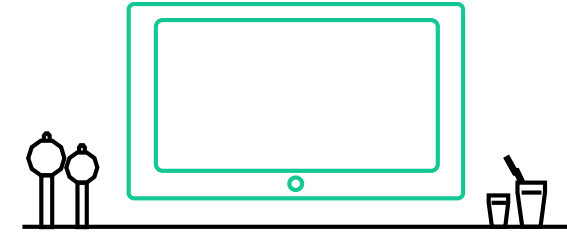
Denmark Kazakhstan Russia  
Estonia Latvia Slovakia  
Finland Lithuania Spain  
France Netherlands Switzerland  
Germany Norway Sweden  
Georgia Portugal UK  
Iceland Romania

## Middle East & Africa

Angola  
Egypt  
Israel  
Kenya  
Nigeria  
South Africa  
Turkey  
United Arab Emirates

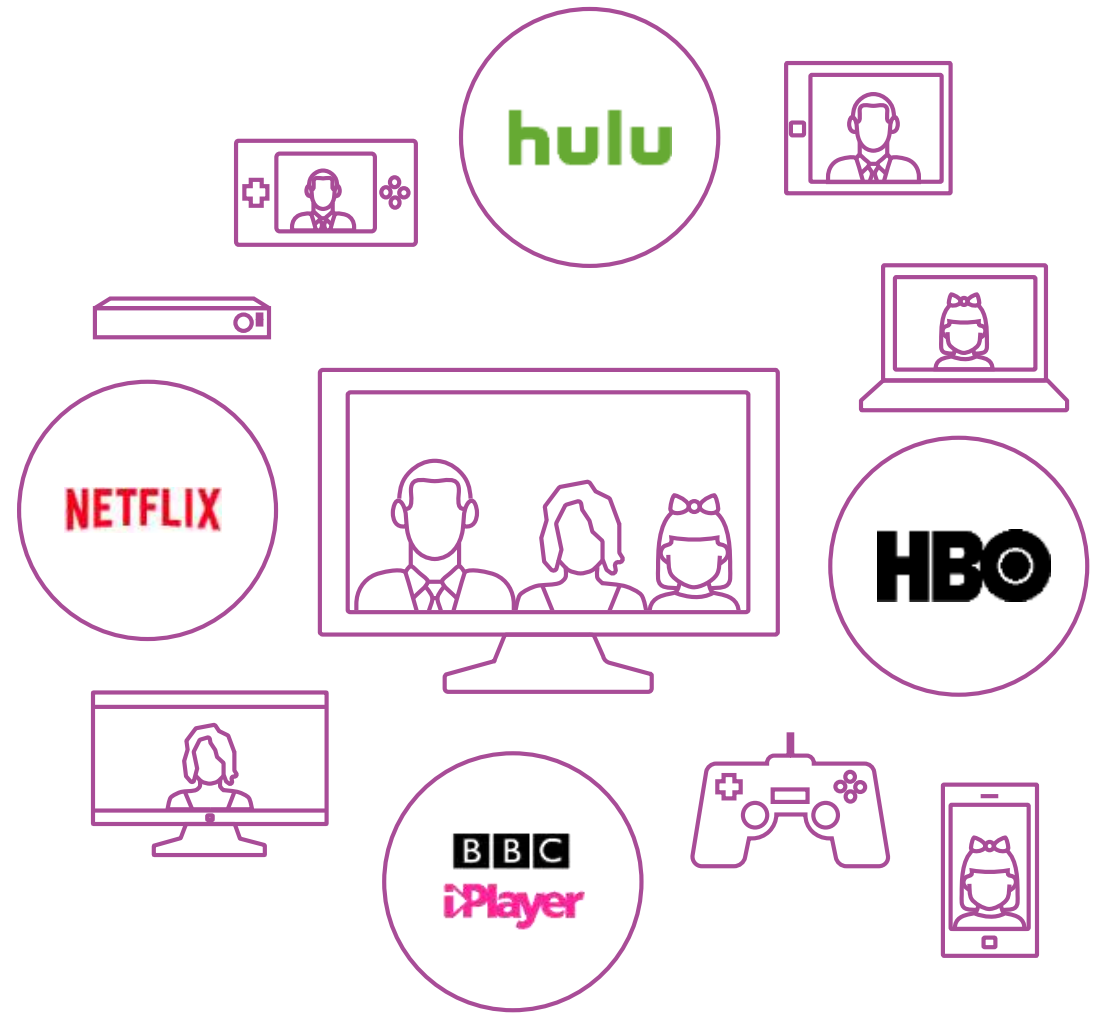
## Asia & Australia

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

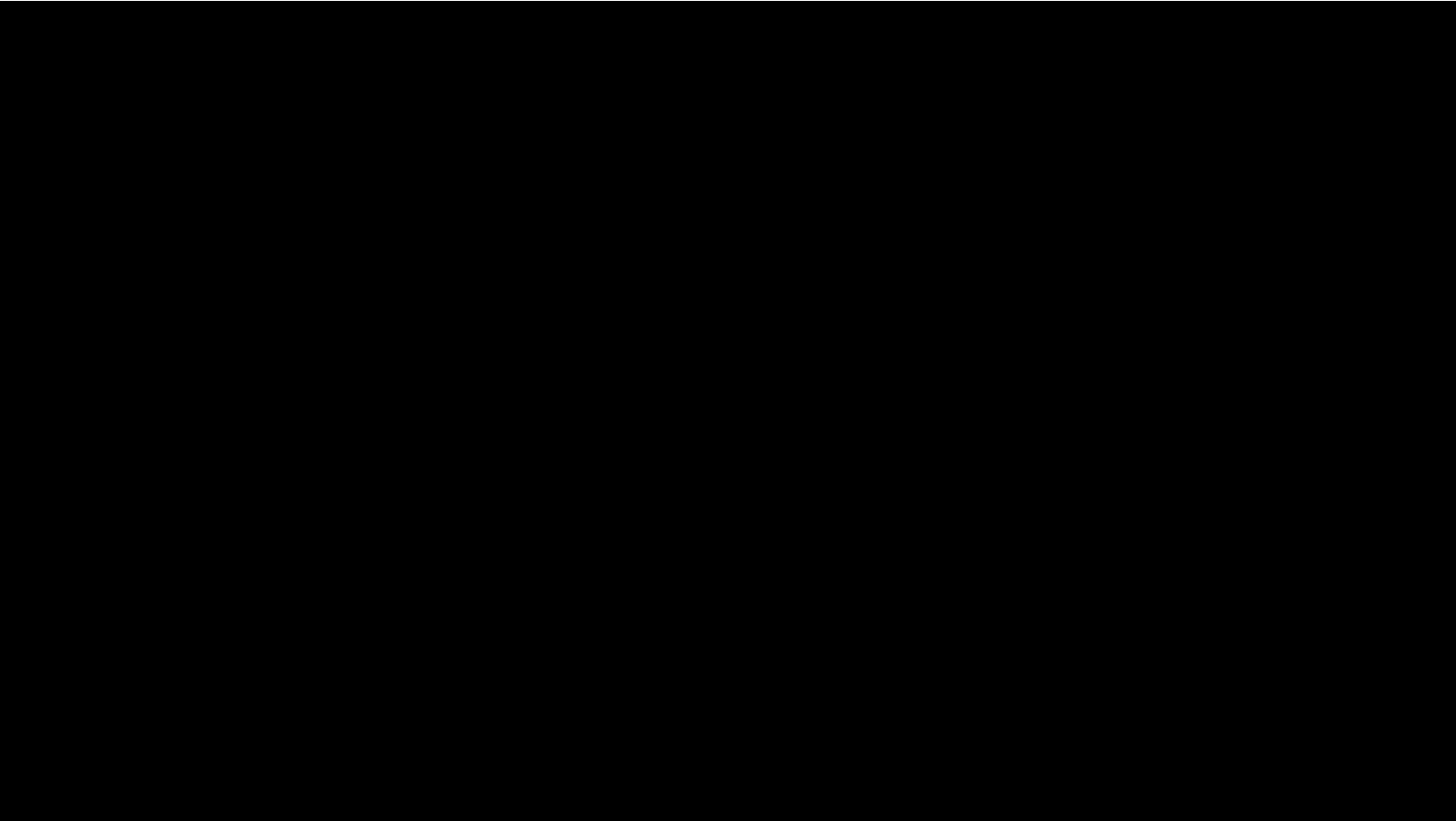


From

# Television to Total Video



# TV to Total Video



One size does not fit all...



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**RETURN  
PATH DATA**

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**CORE PANEL**

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**ONLINE CENSUS  
DATA**

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**FIRST AND  
THIRD PARTY  
DEMOGRAPHICS**

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**SET METER  
PANEL**

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# Not forgetting real time ratings...

tc.net

15:43  
26/09/2014

POR
 ENG
 ESP

**MINUTO A MINUTO**

Praga: GRANDE SAO PAULO REAL TIME - IA      Target: TOTAL DOMICÍLIOS      Data: 26/09/2014

AUTOUPDATE: ON      ATUALIZAR

| MIN   | BASE | GLO<br>IA | BAN<br>IA | Tot<br>IA | REC<br>IA | SBT<br>IA | RTV<br>IA | CUL<br>IA |
|-------|------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 15:42 | 818  | 7.9       | 2.2       | 40.8      | 3.3       | 5.3       | 1.4       | 1.6       |
| 15:41 | 820  | 8.1       | 2.1       | 40.8      | 3.4       | 5.5       | 1.5       | 1.2       |
| 15:40 | 820  | 8.0       | 1.8       | 40.3      | 3.6       | 5.2       | 1.6       | 1.1       |
| 15:39 | 816  | 8.2       | 1.8       | 40.2      | 3.5       | 5.1       | 1.6       | 1.1       |
| 15:38 | 815  | 8.1       | 1.8       | 40.4      | 3.7       | 5.3       | 1.5       | 1.1       |
| 15:37 | 841  | 8.0       | 1.6       | 40.7      | 3.8       | 5.5       | 1.7       | 1.2       |
| 15:36 | 840  | 8.4       | 1.4       | 41.6      | 4.1       | 5.2       | 1.4       | 1.2       |
| 15:35 | 841  | 8.7       | 1.4       | 41.5      | 3.8       | 5.2       | 1.3       | 1.4       |
| 15:34 | 839  | 8.9       | 1.6       | 40.6      | 3.8       | 4.9       | 1.0       | 1.6       |
| 15:33 | 836  | 9.0       | 1.7       | 40.7      | 3.9       | 4.7       | 0.9       | 1.5       |
| 15:32 | 842  | 8.9       | 1.6       | 40.5      | 4.2       | 4.5       | 1.0       | 1.5       |
| 15:31 | 844  | 8.9       | 1.6       | 40.2      | 3.9       | 4.1       | 1.3       | 1.5       |
| 15:30 | 845  | 9.5       | 1.9       | 40.4      | 3.6       | 4.0       | 1.1       | 1.5       |
| 15:29 | 842  | 9.1       | 2.2       | 40.2      | 3.9       | 3.9       | 1.1       | 1.5       |
| 15:28 | 846  | 8.7       | 2.1       | 40.4      | 4.1       | 4.3       | 1.1       | 1.6       |
| 15:27 | 867  | 8.5       | 1.9       | 40.7      | 3.6       | 4.9       | 1.3       | 1.4       |
| 15:26 | 866  | 8.4       | 1.9       | 40.6      | 3.7       | 5.4       | 1.5       | 1.5       |
| 15:25 | 867  | 9.0       | 2.2       | 41.3      | 3.7       | 5.4       | 1.5       | 1.4       |
| 15:24 | 868  | 8.9       | 2.0       | 41.2      | 3.6       | 5.0       | 1.4       | 1.5       |
| 15:23 | 869  | 8.7       | 2.1       | 41.0      | 3.9       | 4.9       | 1.6       | 1.5       |
| 15:22 | 883  | 9.0       | 2.0       | 43.2      | 4.1       | 5.1       | 1.5       | 2.0       |
| 15:21 | 885  | 8.7       | 1.7       | 43.2      | 4.3       | 5.9       | 1.3       | 1.7       |

Coleta de audiência realizada!

[Termo de Confidencialidade](#) | [Manual Técnico](#)

Média

Painel
Filtros
Imagens

15:42:23

GLOBO

TV BAND

RECORD

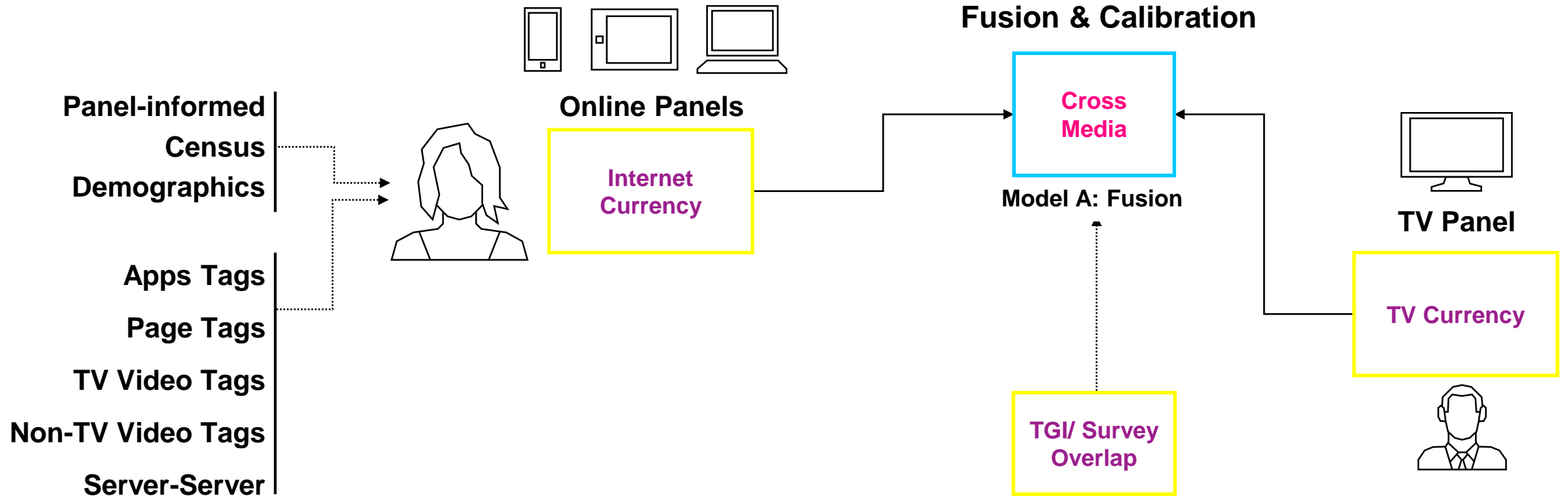
SBT

REDE TVI

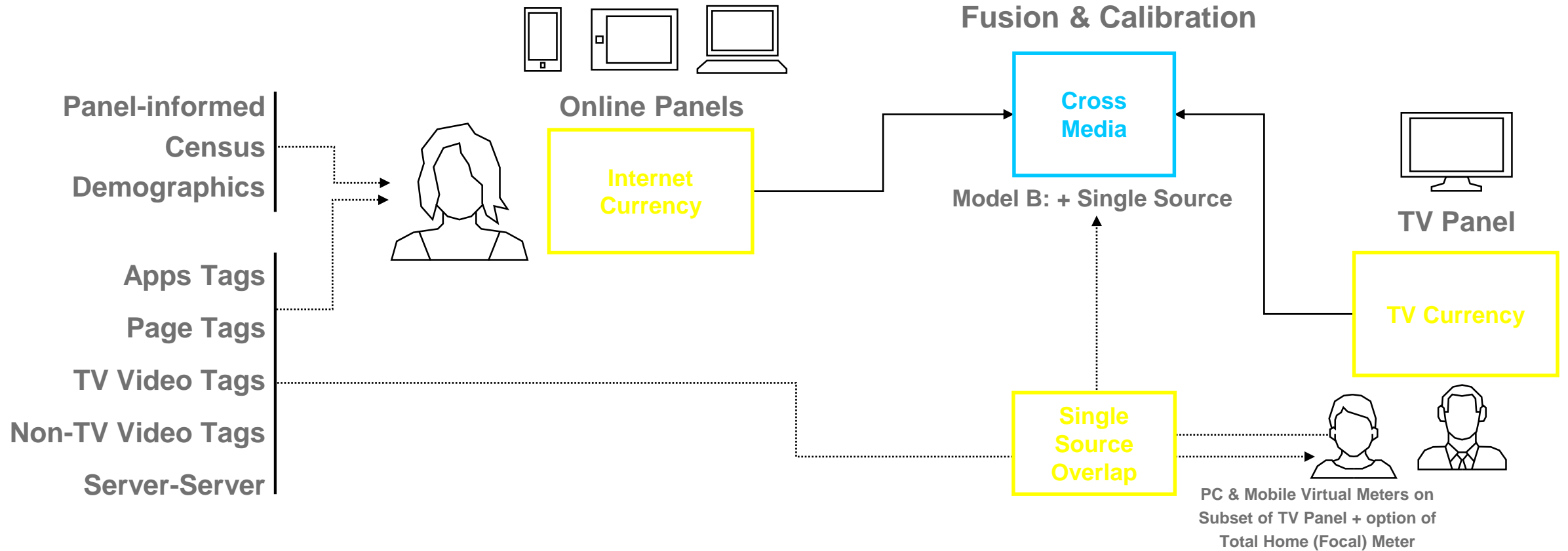
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# Models for Cross-Media Measurement

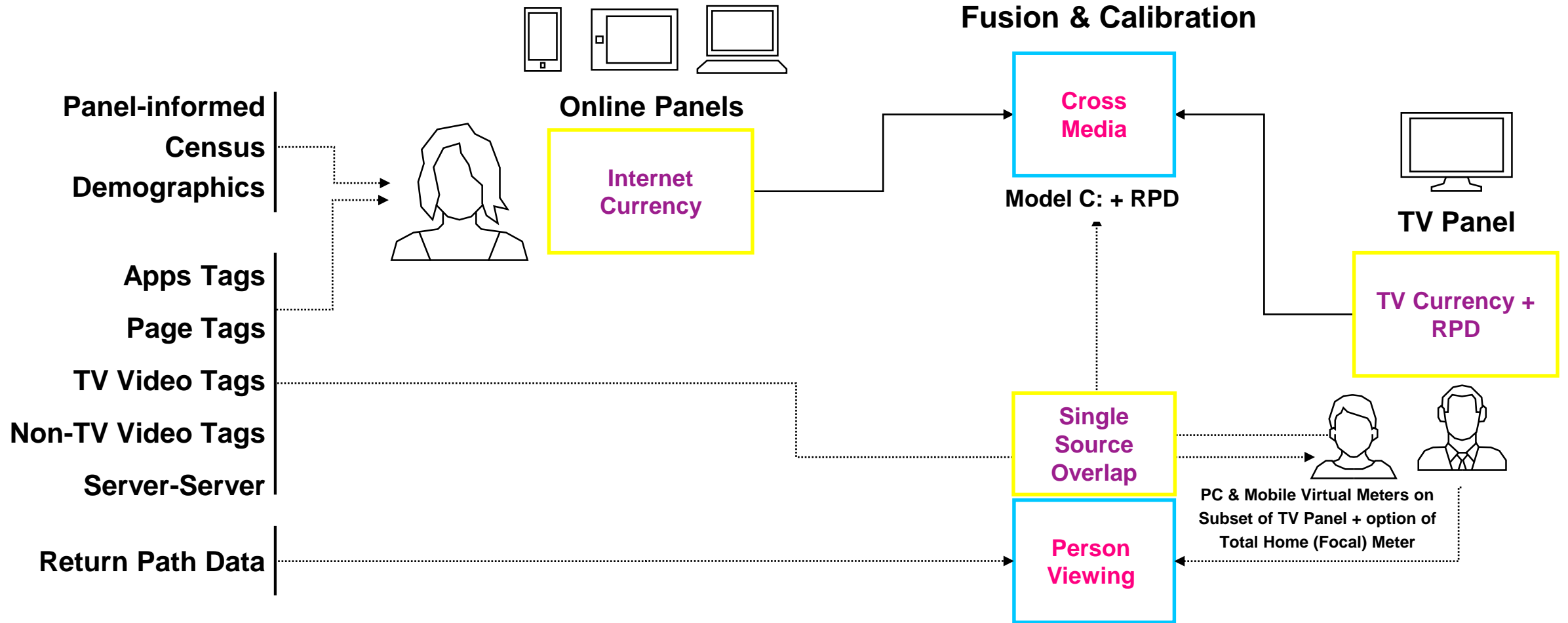
# Model A: Fusion



# Cross Media Model B: + Single Source



# Cross Media Model C: +RPD



# Breaking New Ground

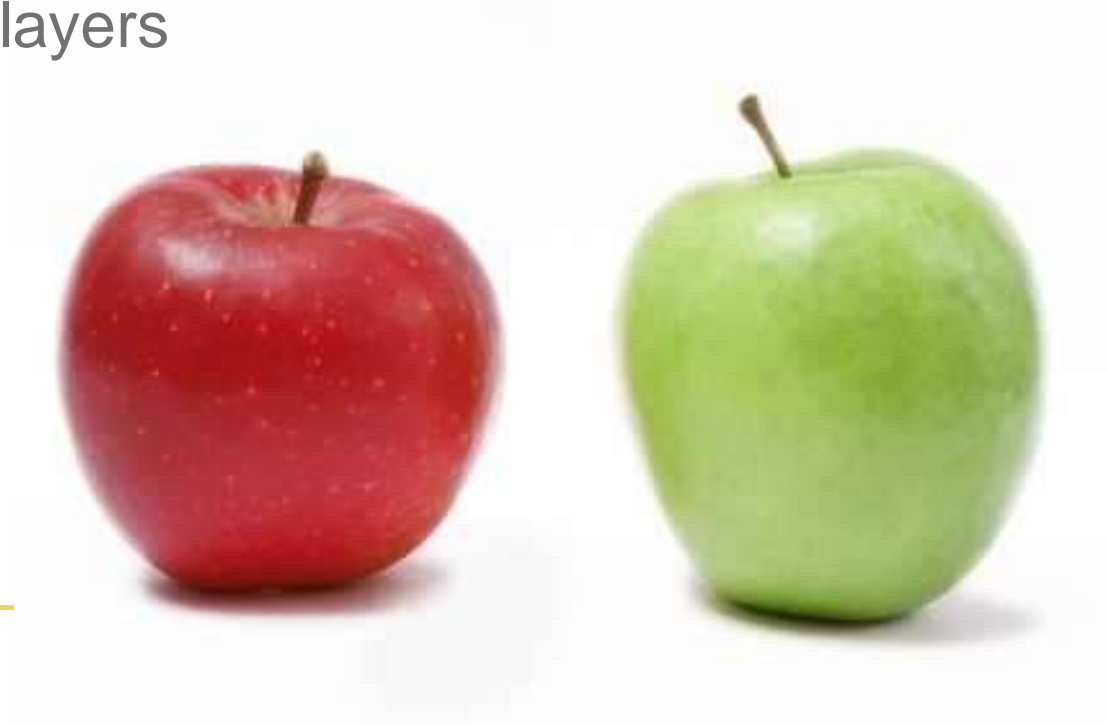
Cross-media measurement case studies

**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.

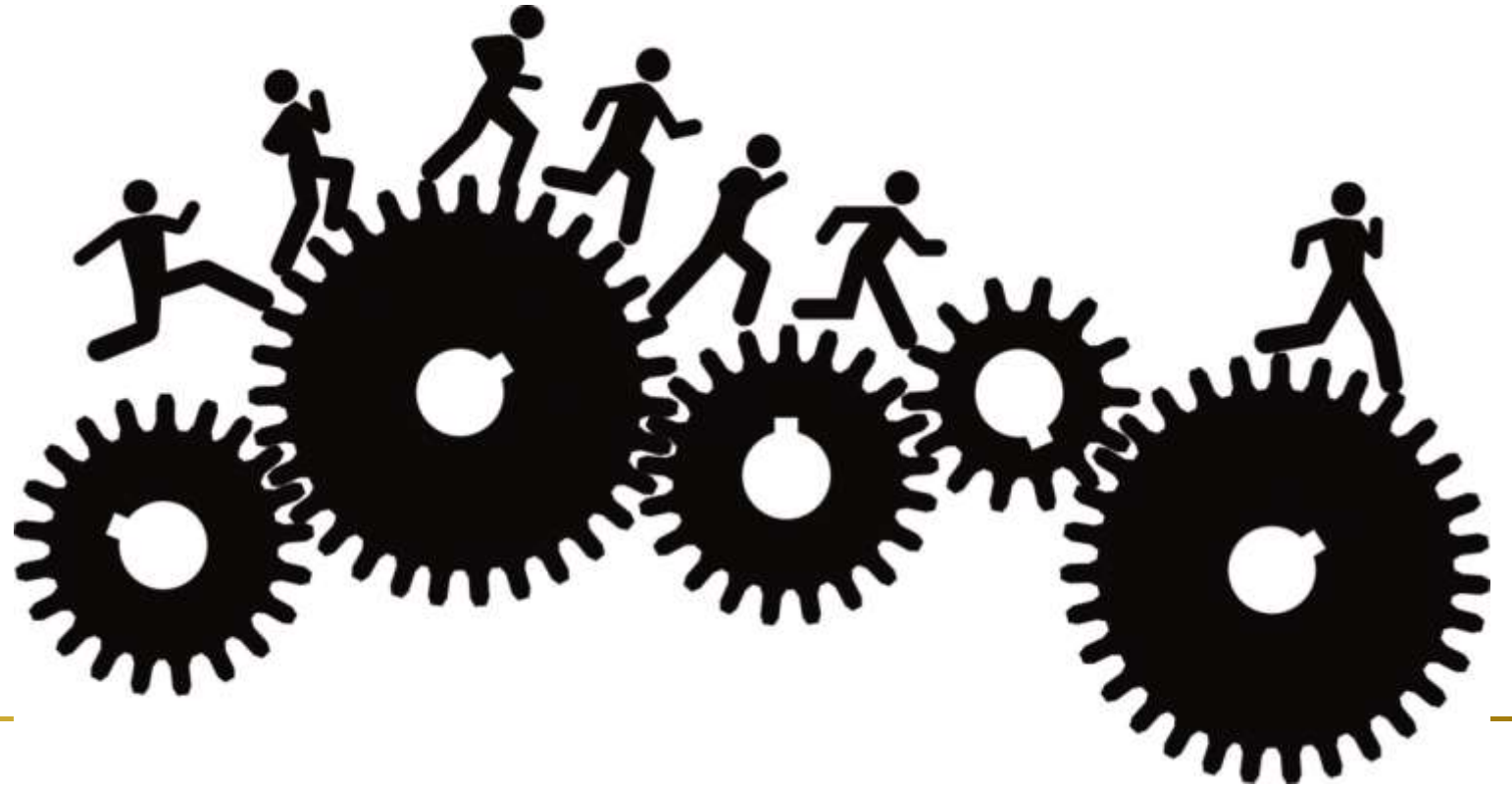




## The TV Player Report

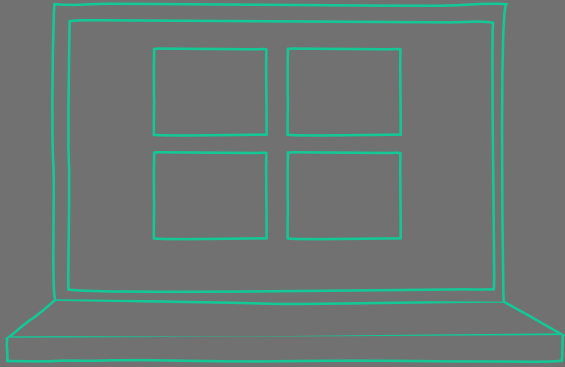
How does it work?

Broadcasters implement our tags, to our specification. The implementation is audited independently.

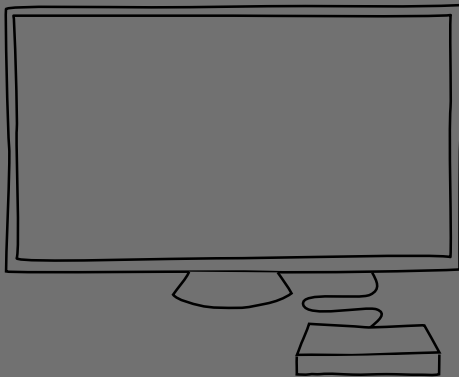


# The TV Player Report

## New Metrics



**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.

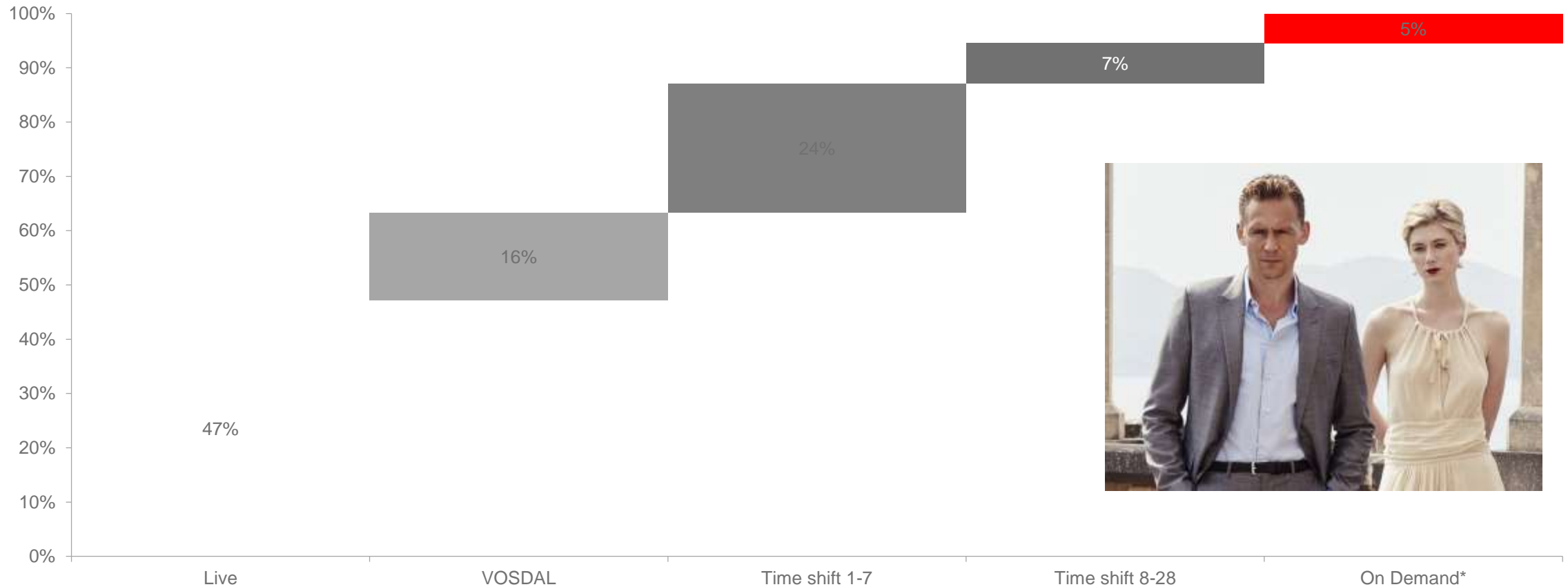
# The Night Manager

## Final episode (27 March 2016)

Individuals 4+

47% of the viewing came from Live.

On Demand adds 5% to the total viewing, less than time shift 8-28 days



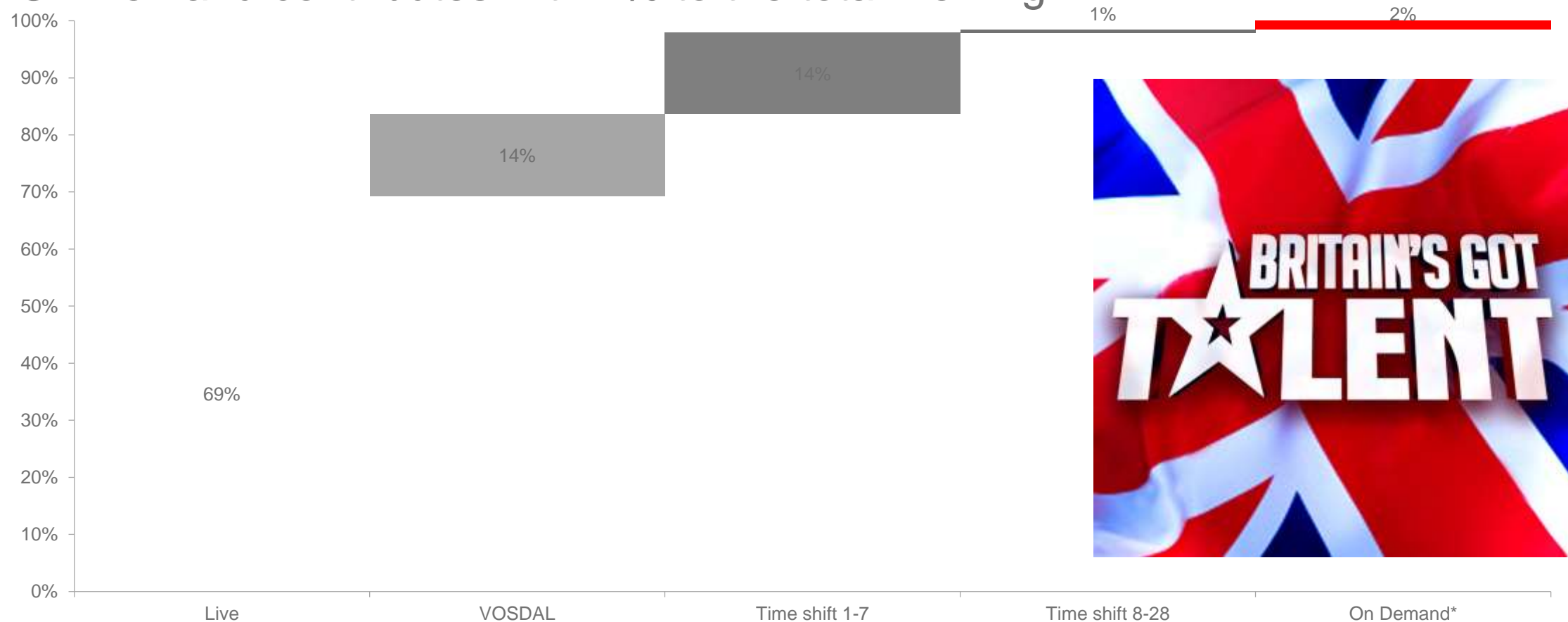
# Britain's Got Talent

Season 10 final (28 May 2016)

Individuals 4+

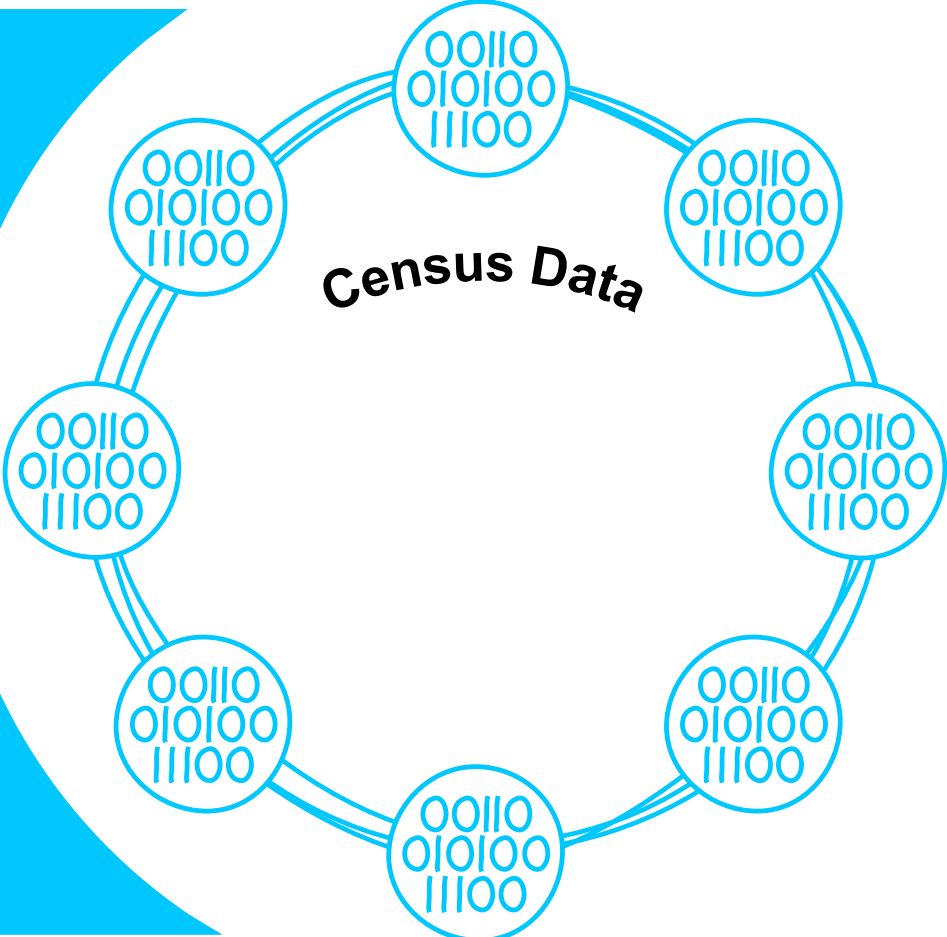
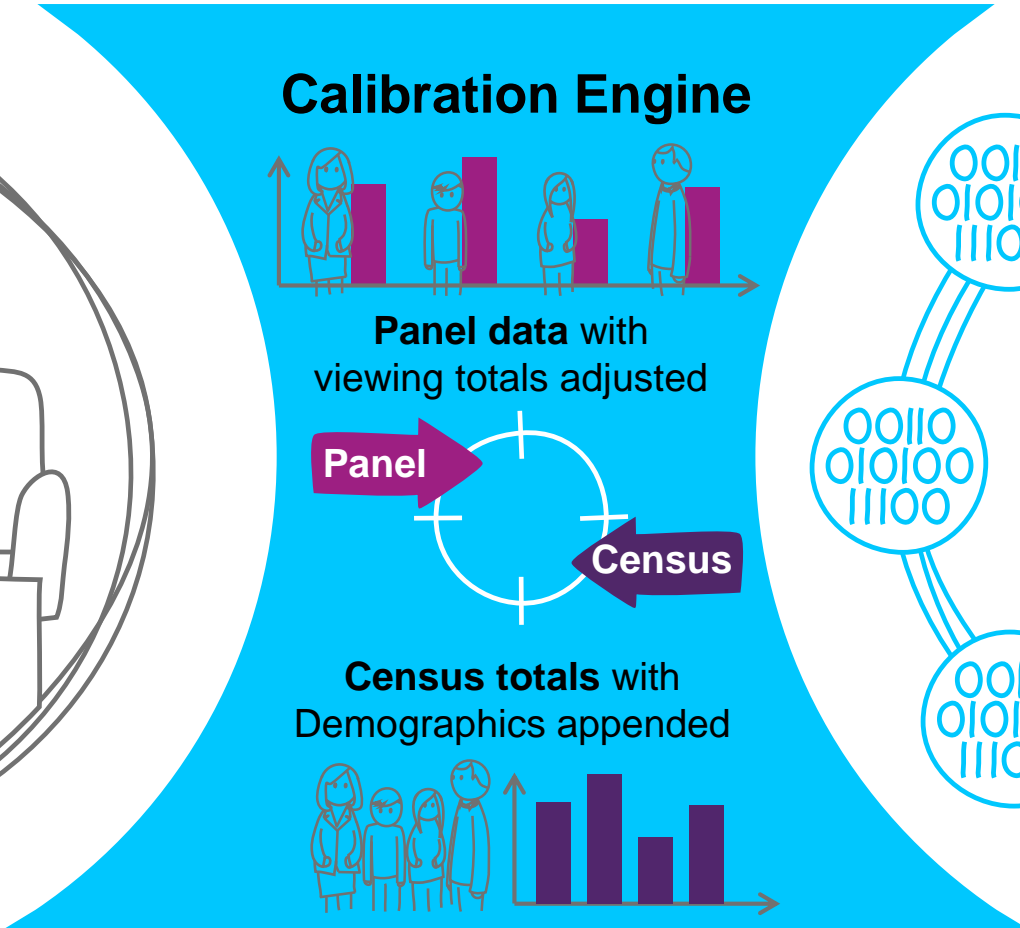
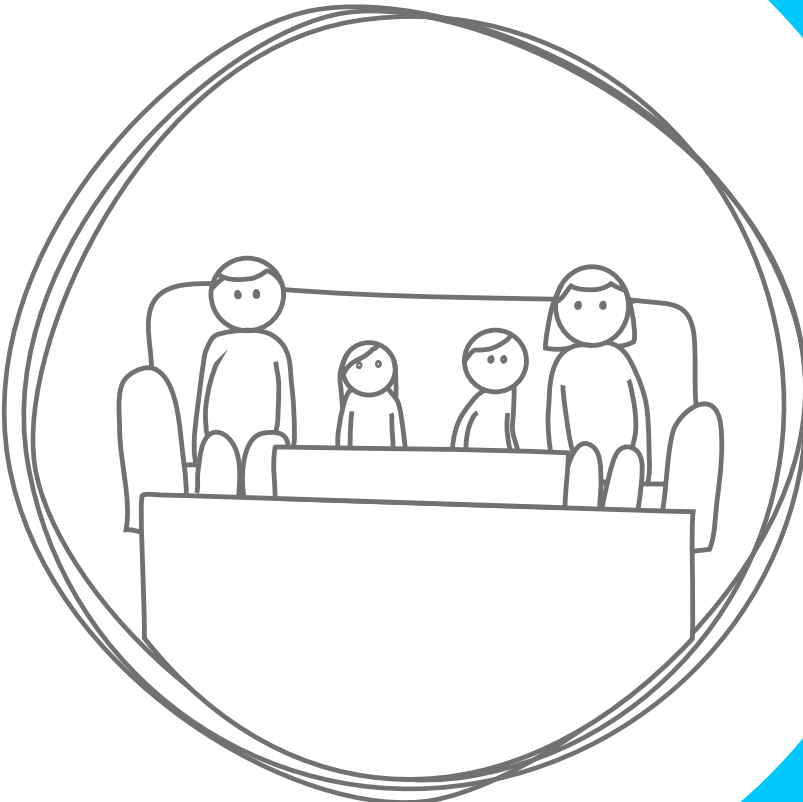
Watched Live by 69% of the viewers.

On Demand contributes with 2% to the total viewing



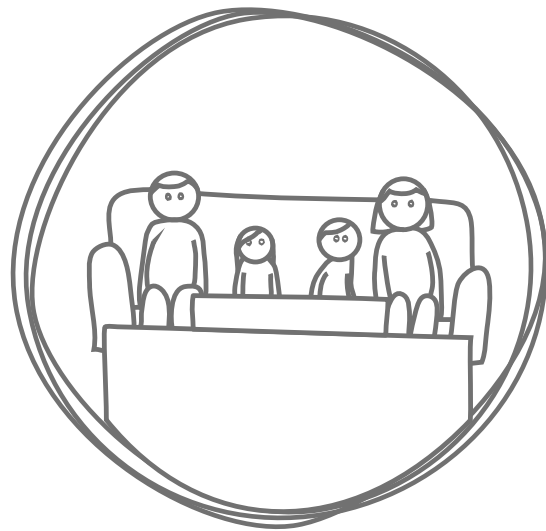
# Data integration

## Combining Panel & Census Data



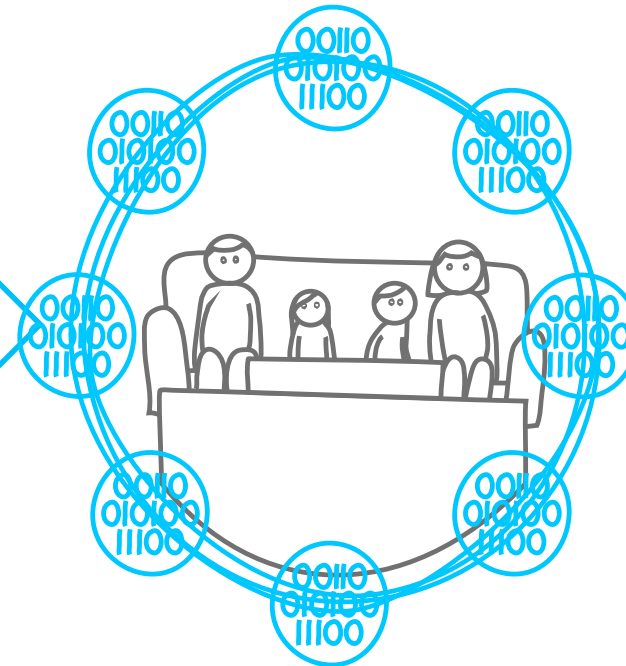
## Calibration principle

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



Panel

Calibration Targets  
using Census Data



Calibrated  
Panel

Targets met

Usage behaviour

Increased granularity

Corrected reach

Demographics respected

Soft targets met

**Norway**

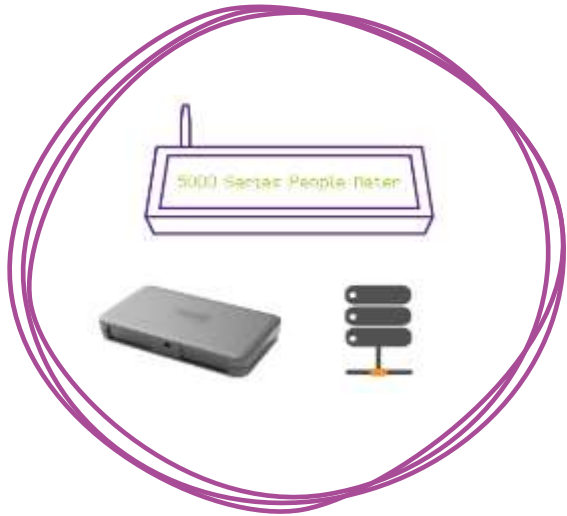
**NRK**

**MTG**

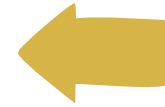
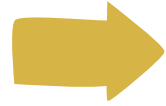


**DISCOVERY**  
NETWORKS  
NORWAY

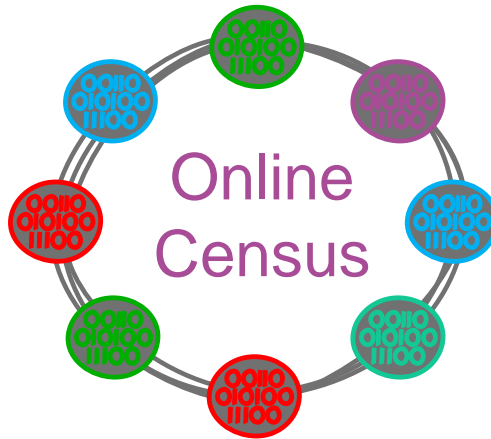


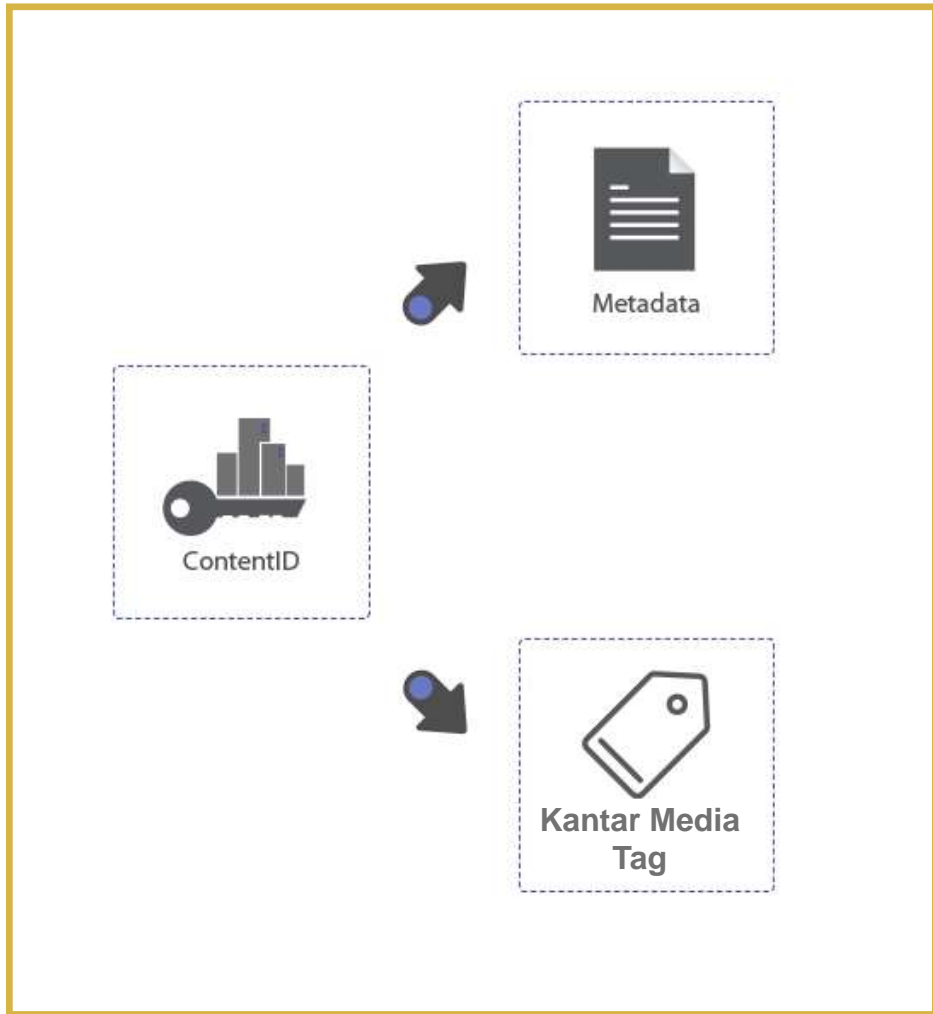


Panel A



Panel B





## 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.

# Stop Press !



**Collaborative Effort.  
Meaningful Change.**

- Lexicon
- News Alerts
- Active RFPs
- Join Now

"CIMM provides not only a unique forum for conversation among experts from across the media landscape but also a unique venue through which to evolve media measurement by engaging the vendors on the bleeding edge of innovation to address today's real-world challenges. It's critical for our organization to be an active participant in these discussions and experiments."

— Jonathan Seiser, Chief Research Officer, Omnicom Media Group

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## Kantar Media Audio Watermarking Technology Selected For Next Step in SMPTE Standardization To Bind IDs to Media Assets

FEBRUARY 15, 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 Binding of IDs Drafting 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-ID, 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 embed 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

Search

**Press Coverage Archives**

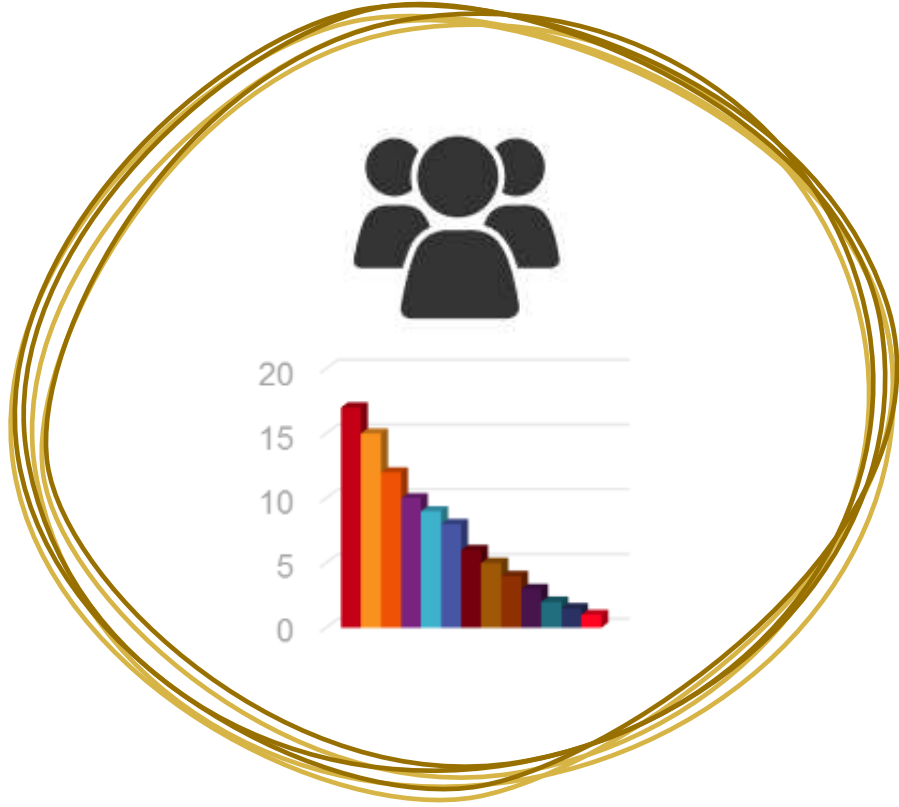
Select Month

**Featured Downloads**

- CIMM / 4As Whitepaper: Current Practices in Attribution and ROI Analysis February 2017
- CIMM Cross-Platform Measurement Manifesto
- CIMM Best Practices in Cross-Device and Cross-Channel Identity Measurement
- CIMM RFP for Combining Smart TV and STB Data
- CIMM LEXICON 3.0\_July 2016

**News & Press Coverage**

- CIMM And 4A's Find Much Advancement Still Needed For "Real-Time" Cross-Platform Attribution and ROI Analysis Methods To Mature
- Kantar Media Audio Watermarking Technology Selected For Next Step in SMPTE Standardization To Bind IDs to Media Assets
- CIMM Assesses State of Cross-Platform Measurement at 6th Annual Summit

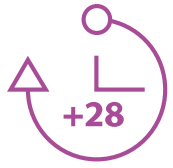


**NRK**

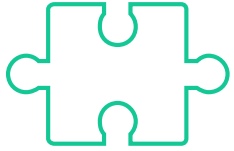


**MTG**

 **DISCOVERY  
NETWORKS  
NORWAY**



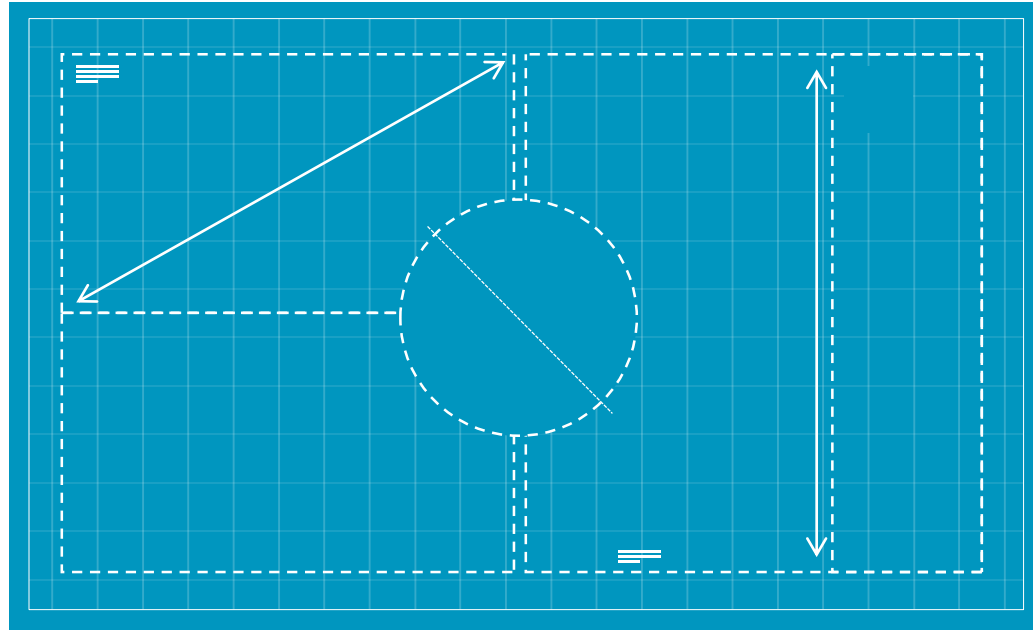
**Extended  
time-shift**



**Cross-media  
measurement**



**Real time  
ratings**



**Buy &  
why**



**Programmatic  
API**



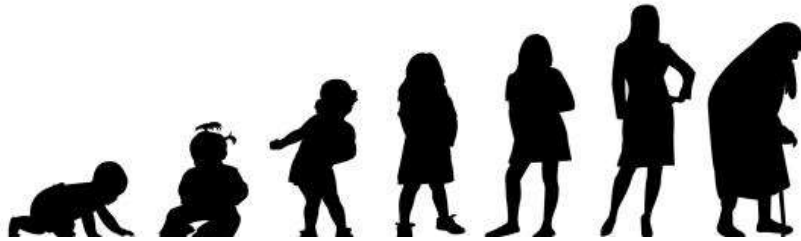
**Audience  
engagement**

**Proprietary model e.g. Google UK**

## A reminder about what the panel is



1,000 'Gold' homes  
and 2,000 from Kantar WorldPanel

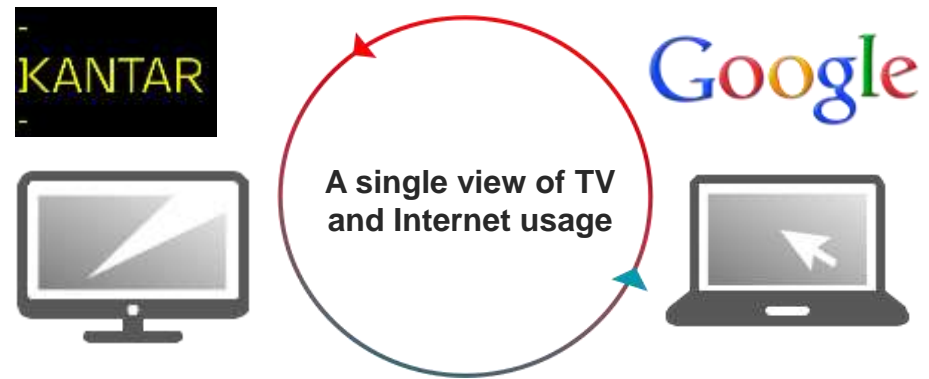
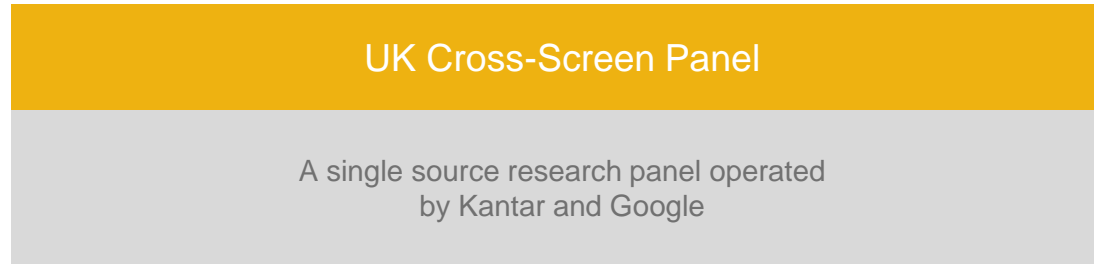


All household members



All internet connected devices

# Google analyses the web data, Kantar the TV data



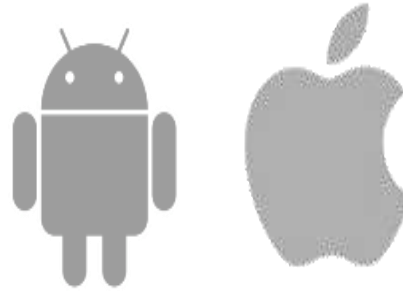
Cross-screen media usage from 3,500 UK online households



# 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 chosen 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)

**KANTAR MEDIA**

**THANK YOU!**