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

6,000+
employees

32,000
clients

Tracking
3 million
brands

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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
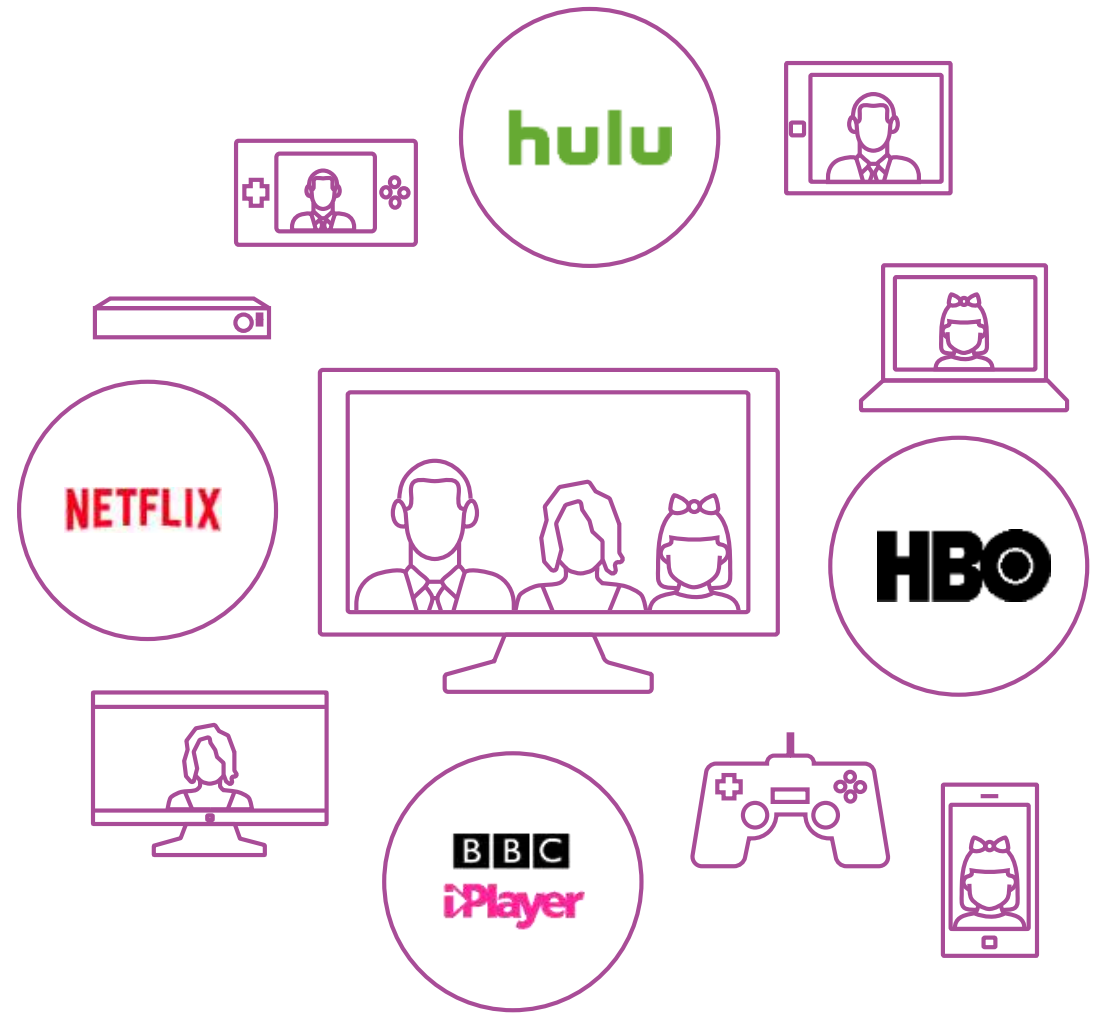Kenya
Nigeria
South Africa
Turkey
United Arab Emirates

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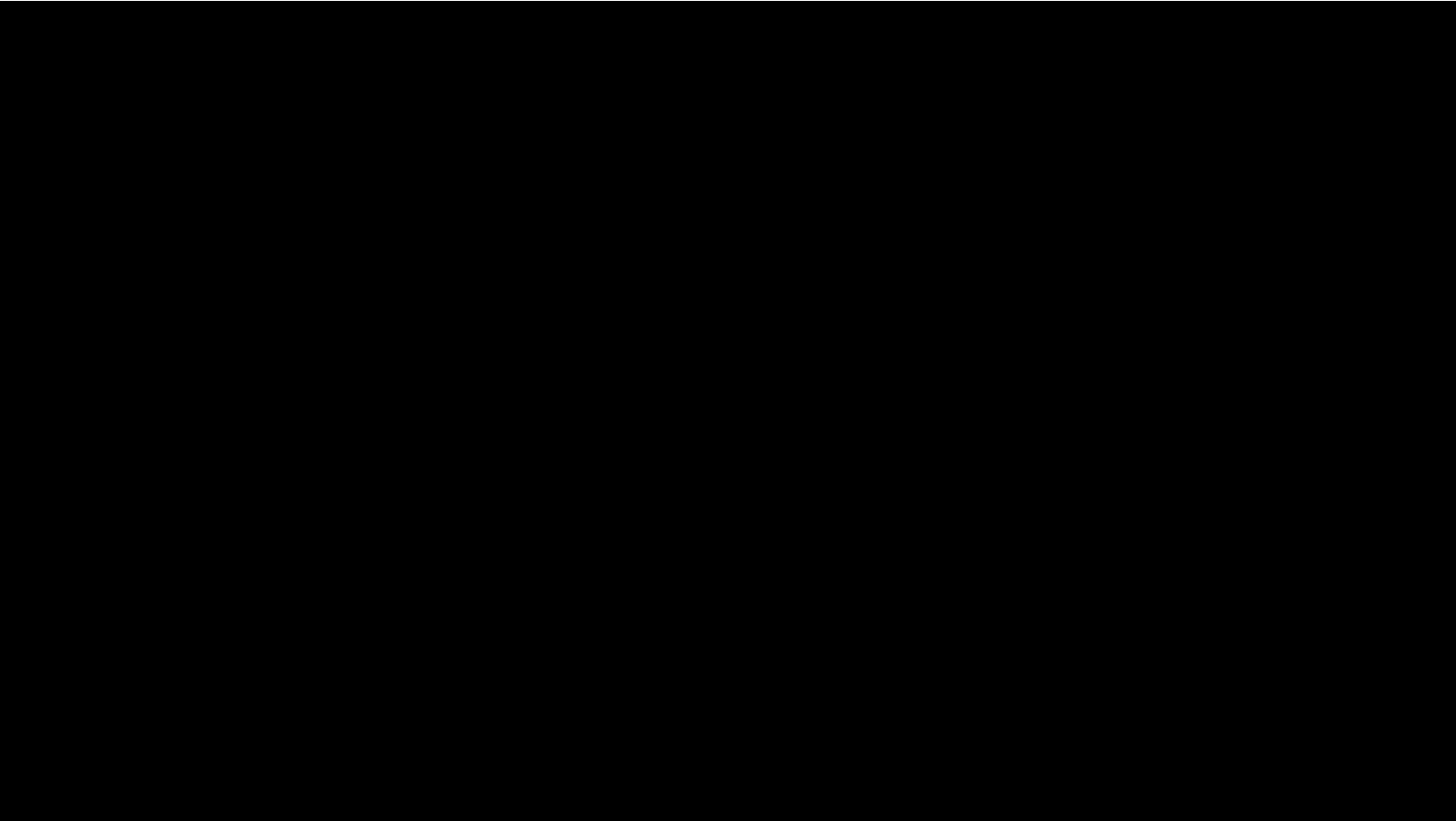Philippines
Singapore
South Korea
Sri Lanka
Thailand
Vietnam

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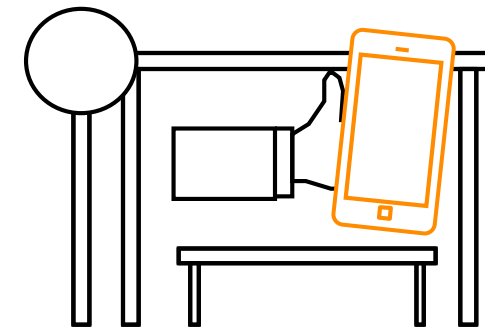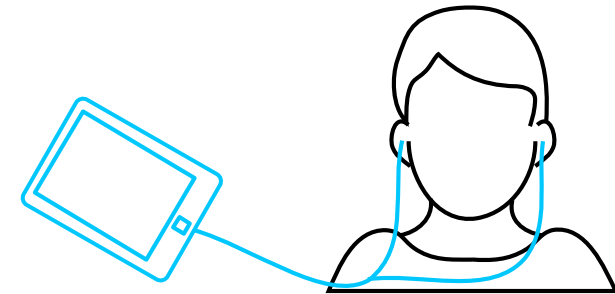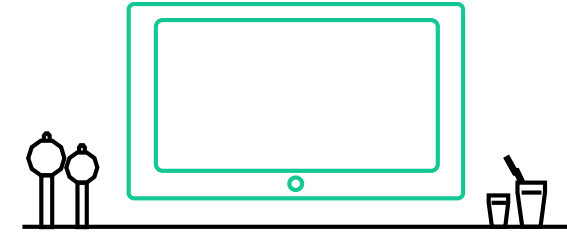
From

TeleVTSViion to
Total Video

TV to Total Video

One size does not fit all…

RETURN PATH DATA

SET METER PANEL

CORE PANEL

ONLINE CENSUS DATA

FIRST AND THIRD PARTY DEMOGRAPHICS

© Kantar Media

Not forgetting real time ratings…

Models for Cross-Media Measurement

Model A: Fusion

Online Panels

Panel-informed
Census
Demographics

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

Internet Currency

Fusion & Calibration

Cross Media

Model A: Fusion

TGI/ Survey Overlap

TV Panel

TV Currency

Cross Media Model B: + Single Source

Fusion & Calibration

Online Panels

Panel-informed
Census
Demographics

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

Internet Currency

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

KANTAR MEDIA | comSCORE.

Cross Media Model C: +RPD

Online Panels

Fusion & Calibration

Internet Currency

Cross Media

Model C: + RPD

TV Panel

TV Currency + RPD

Panel-informed
Census
Demographics

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

Single Source Overlap

Return Path Data

Person Viewing

PC & Mobile Virtual Meters on Subset of TV Panel + option of Total Home (Focal) Meter
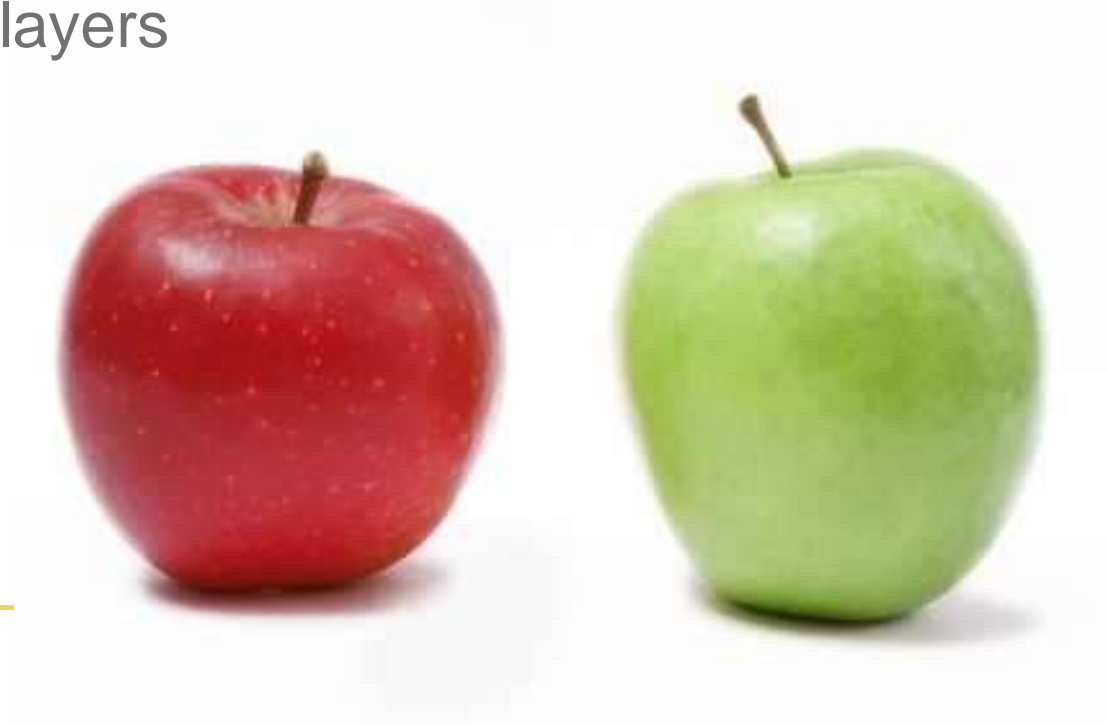
Breaking New Ground
Cross-media measurement case studies

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.

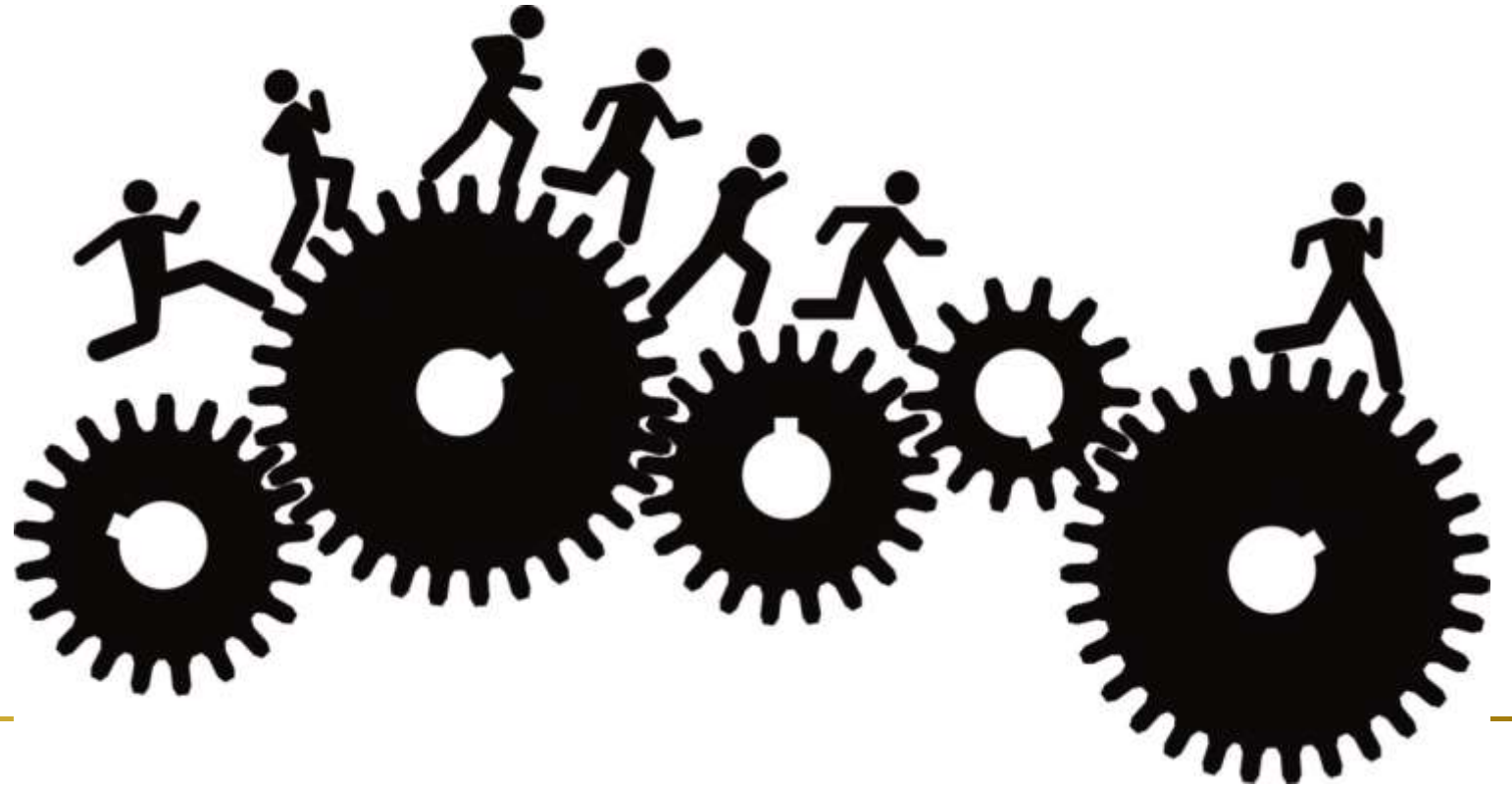- For the first time we were able to see the players side by side on a like for like basis.

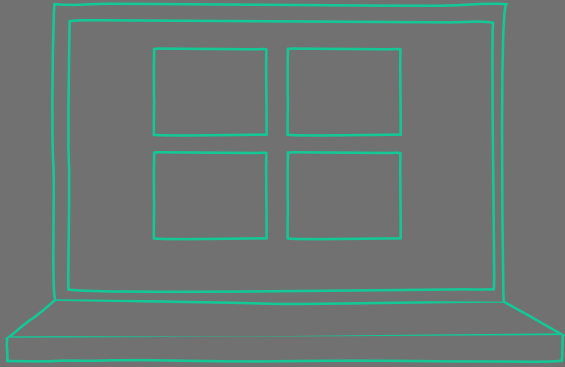Broadcasters implement our tags, to our specification. The implementation is audited independently.

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Total viewing time
the total number of minutes that devices have received content.
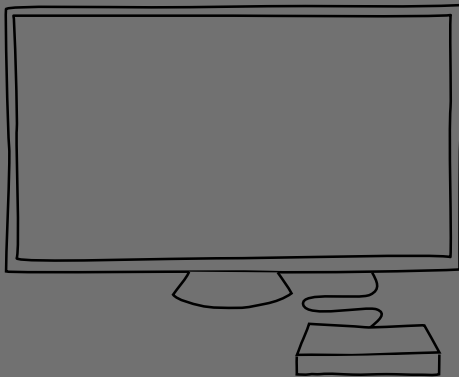
Average programme streams

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.
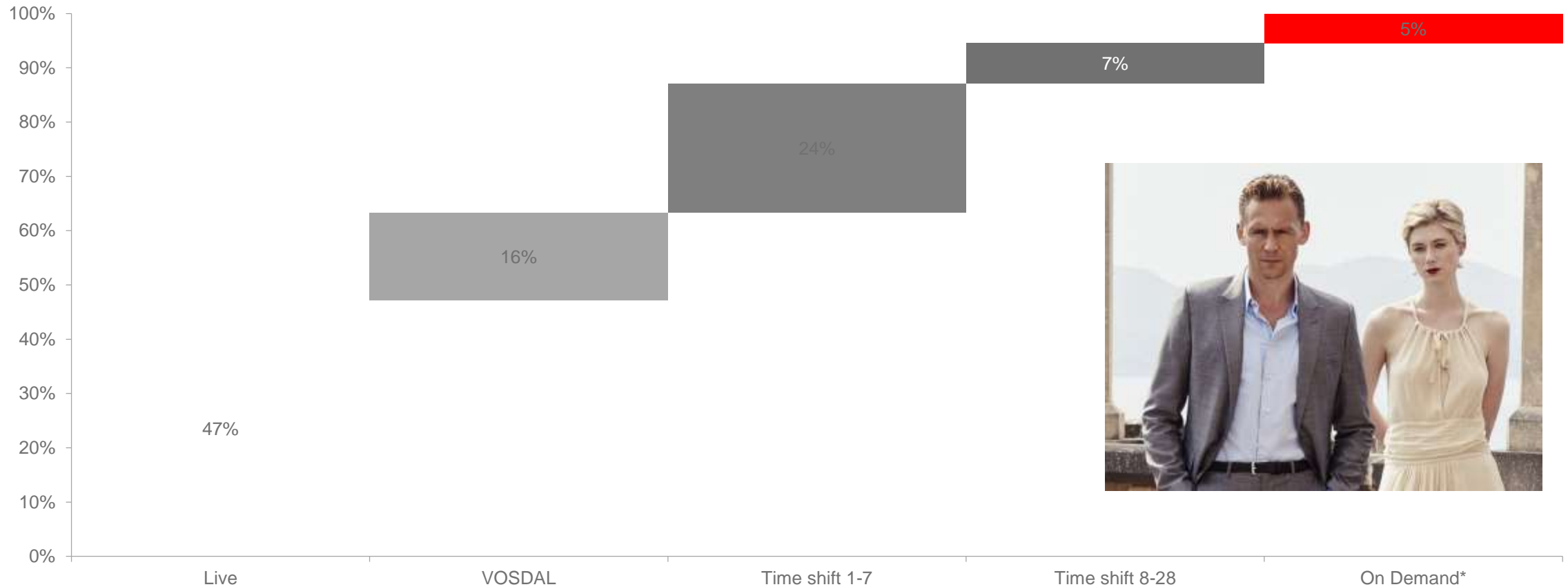
The Night Manager
Final episode (27 March 2016)

Individuals 4+

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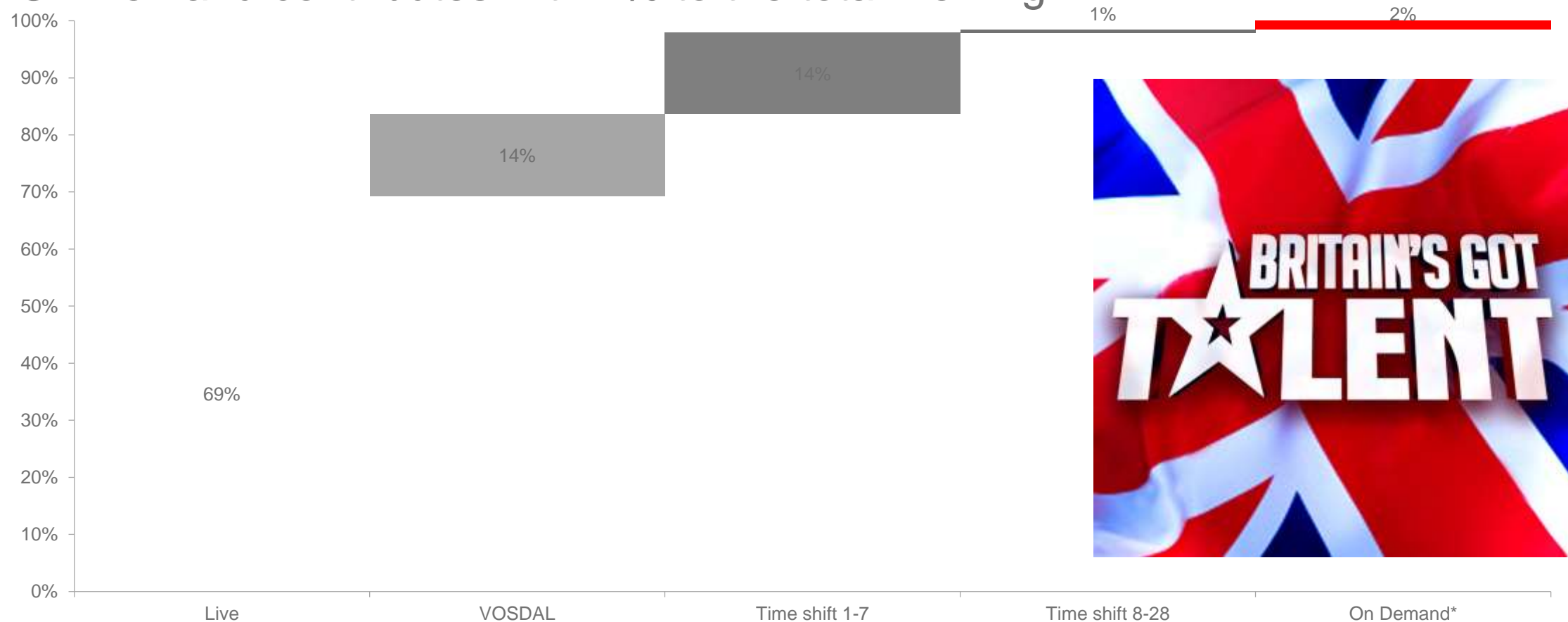

47%	16%	24%	7%	5%
Live	VOSDAL	Time shift 1-7	Time shift 8-28	On Demand*

Source: BARB
*Estimated rating based census data

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
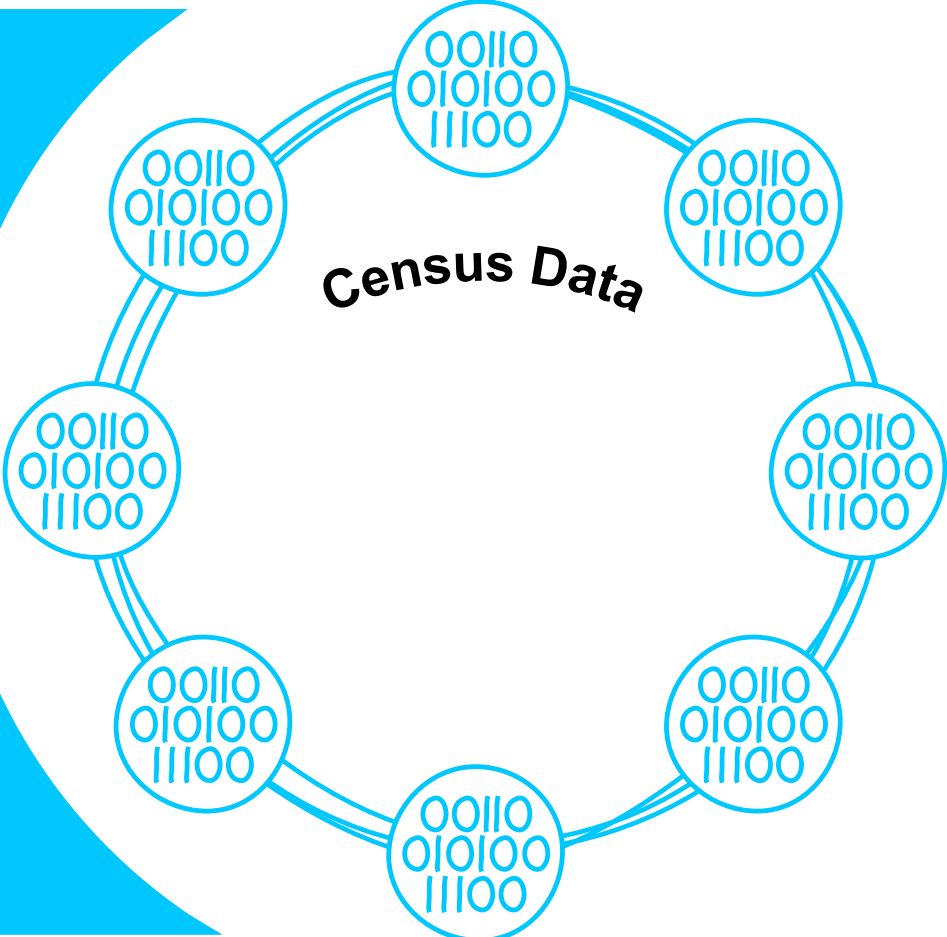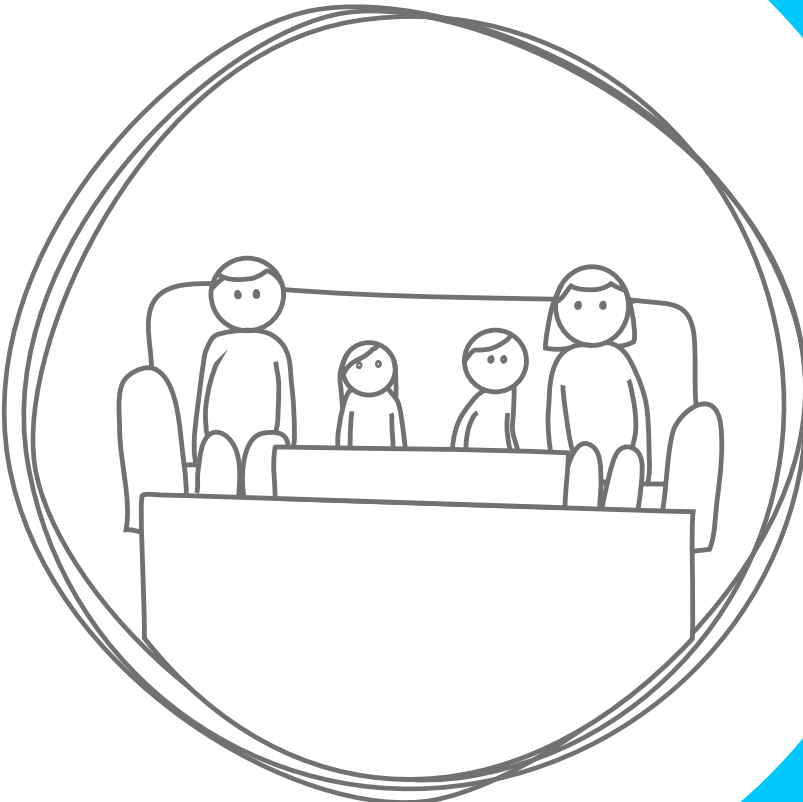## Season 10 final (28 May 2016)

Individuals 4+

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

Chart axis (vertical): 100%, 90%, 80%, 70%, 60%, 50%, 40%, 30%, 20%, 10%, 0%

Values: 69% (Live), 14% (VOSDAL), 14% (Time shift 1-7), 1% (Time shift 8-28), 2% (On Demand*)

Categories: Live | VOSDAL | Time shift 1-7 | Time shift 8-28 | On Demand*

Source: BARB
*Estimated rating based on census data

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

Data integration
Combining Panel & Census Data

Calibration Engine

Panel data with viewing totals adjusted

Panel

Census

Census totals with Demographics appended

Census Data
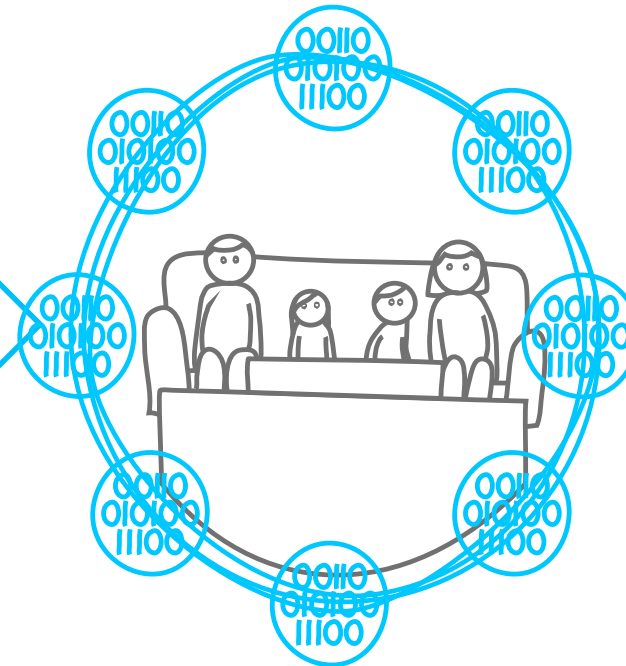
OOIIO OIOIOO IIIOO

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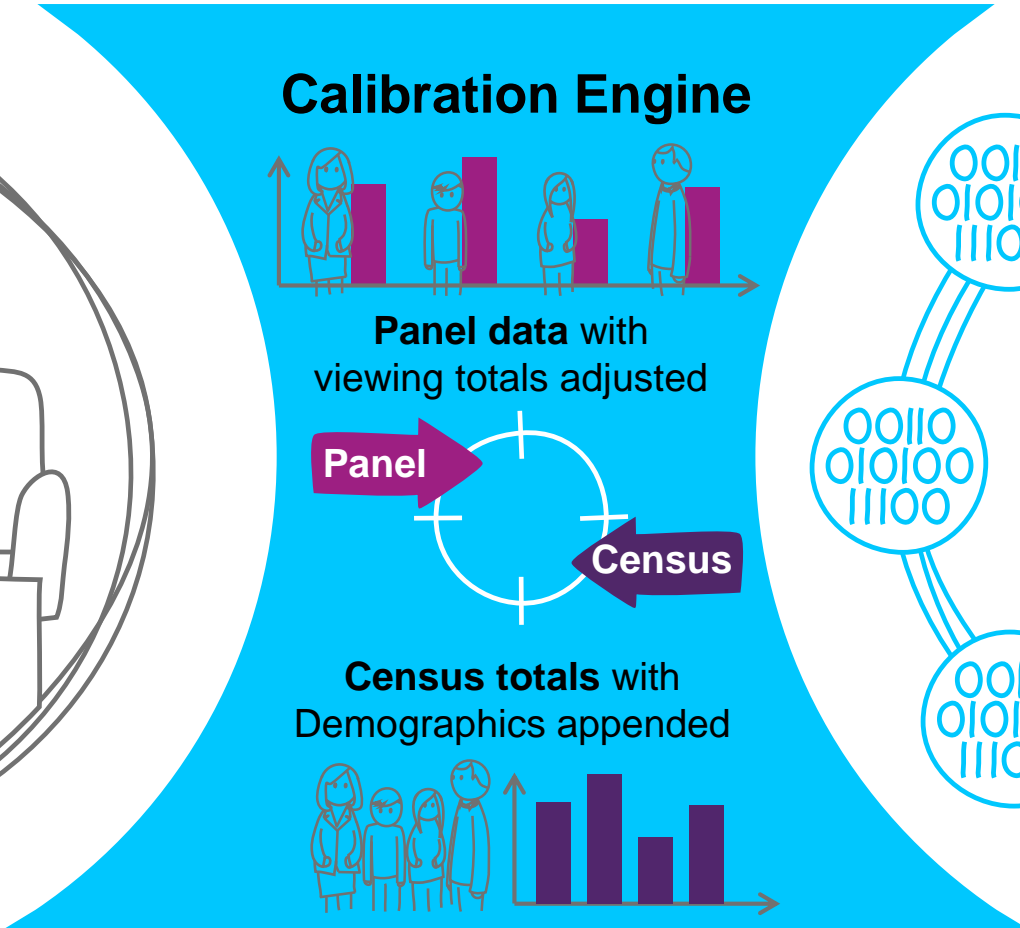
Calibration principle

Adjust the panel so that viewing, demographic and reach targets are met
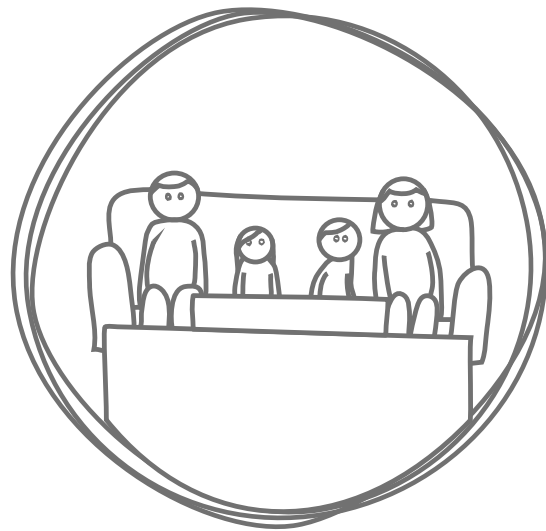
Calibration Targets using Census Data

Panel

Calibrated Panel

Targets met

Usage behaviour

Increased granularity

Corrected reach

Demographics respected

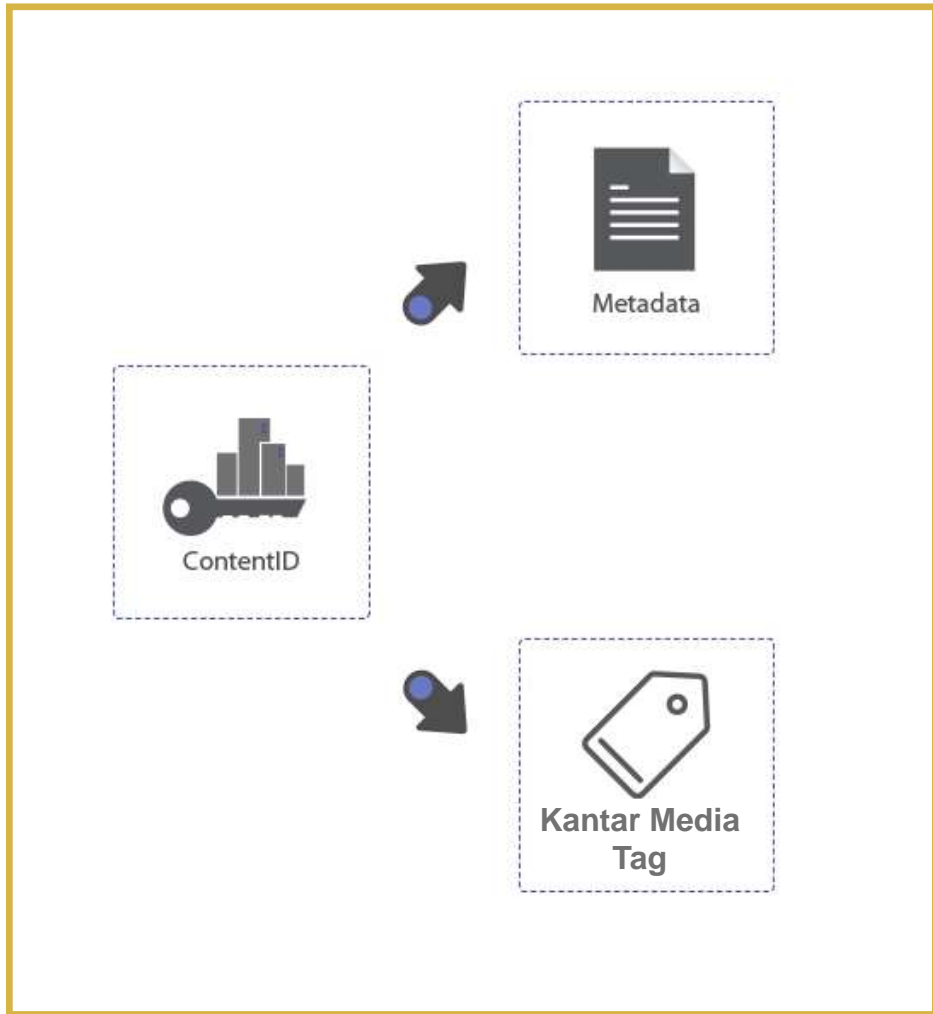Soft targets met

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Norway

Panel A

Panel B

Online Census

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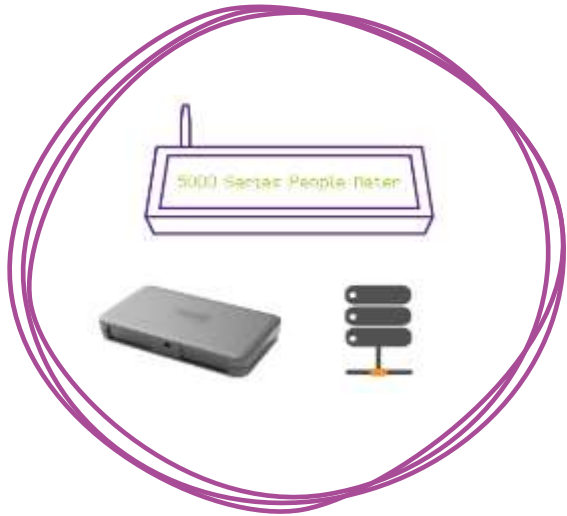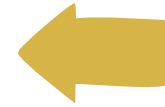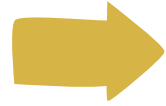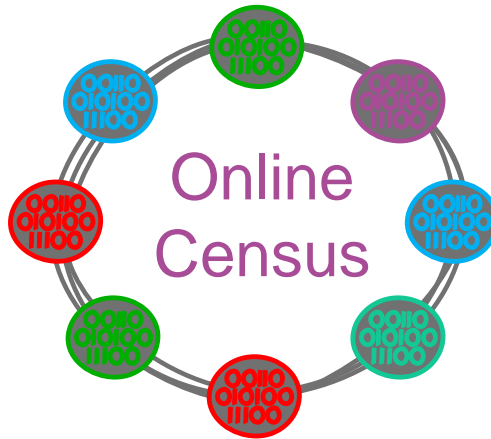
ContentID

- 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 !

Extended
time-shift

Cross-media
measurement

Real time
ratings
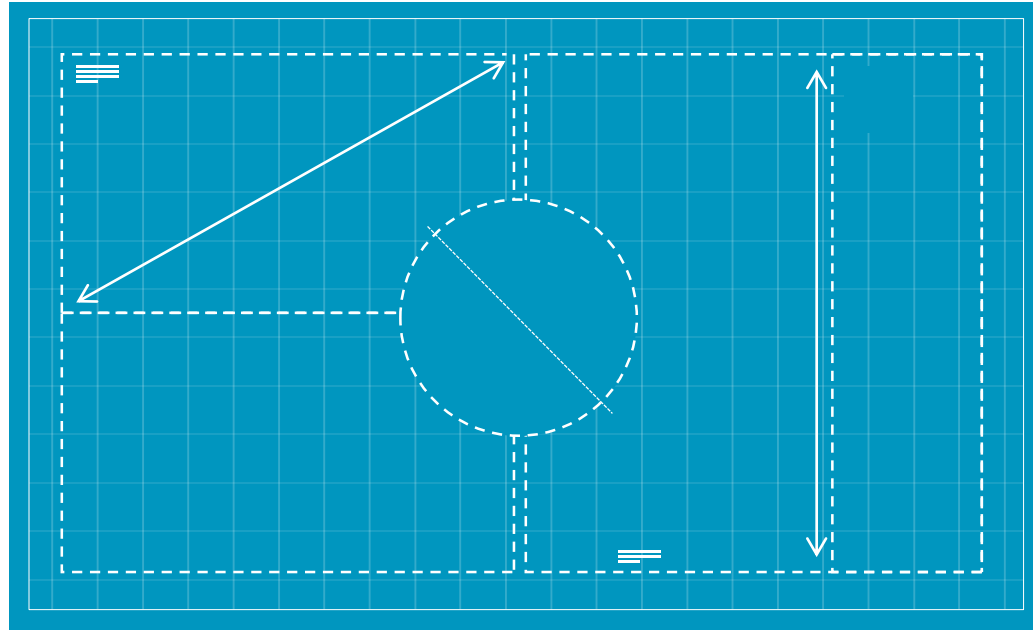
Buy &
why

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**
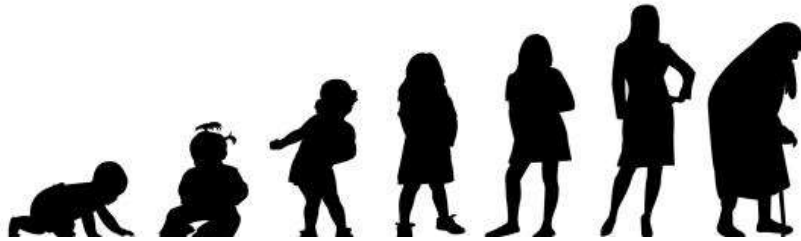
All household members

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

KANTAR

Google

**A single view of TV
and Internet usage**
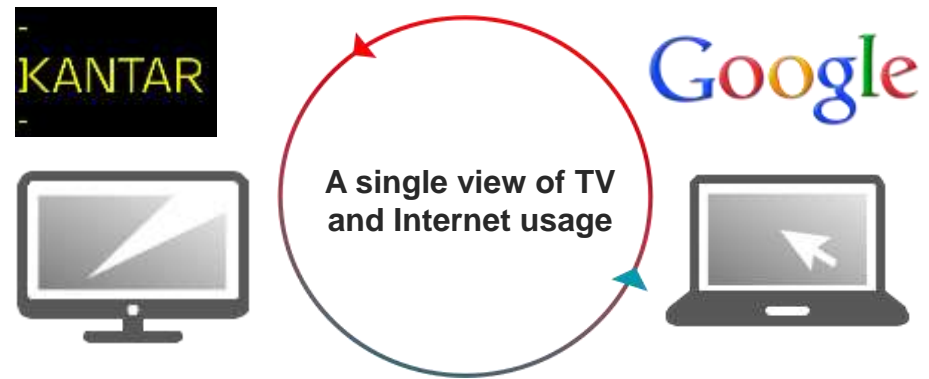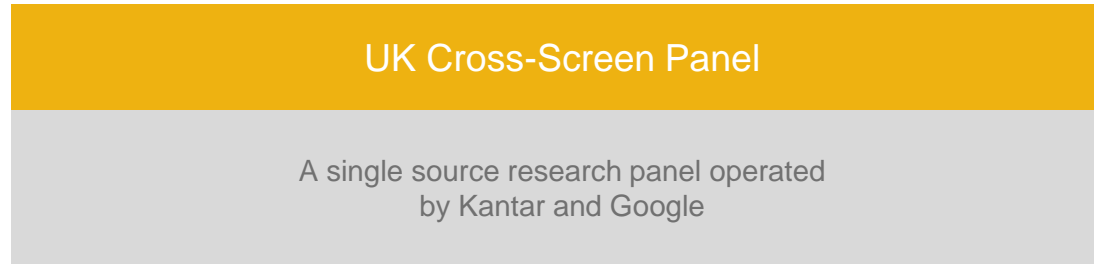
**Cross-screen media usage from 3,500
UK online households**

The web meters

Router
in-home http traffic &
devices
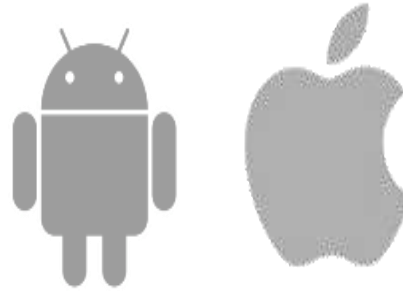
Mobile apps
Android & iOS

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

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Summary

There is no single model that woks 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)

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THANK YOU!