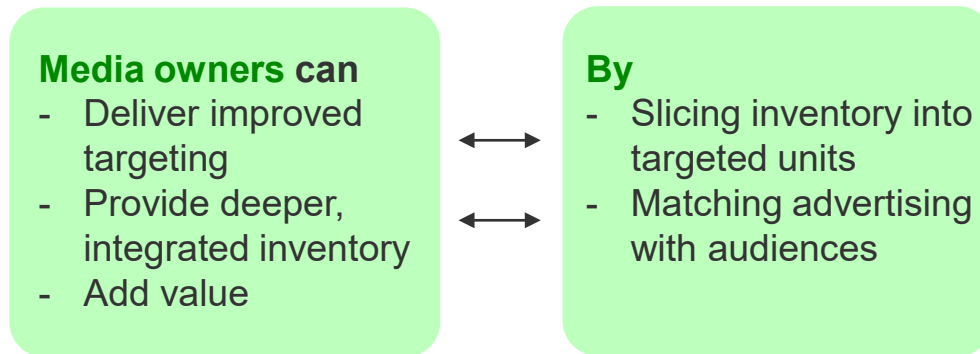# KANTAR

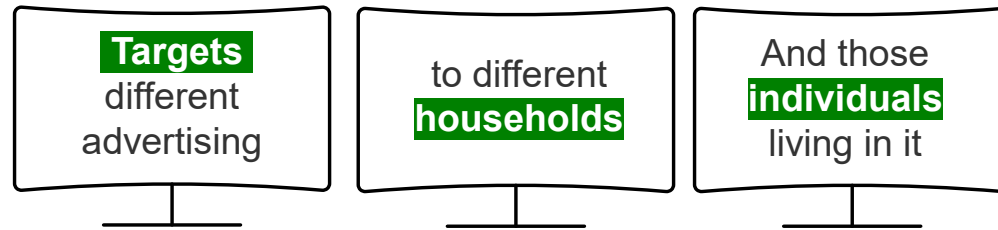# Addressable TV: unlocking the opportunities

Bas de Vos

Addressable TV & Audience Measurement
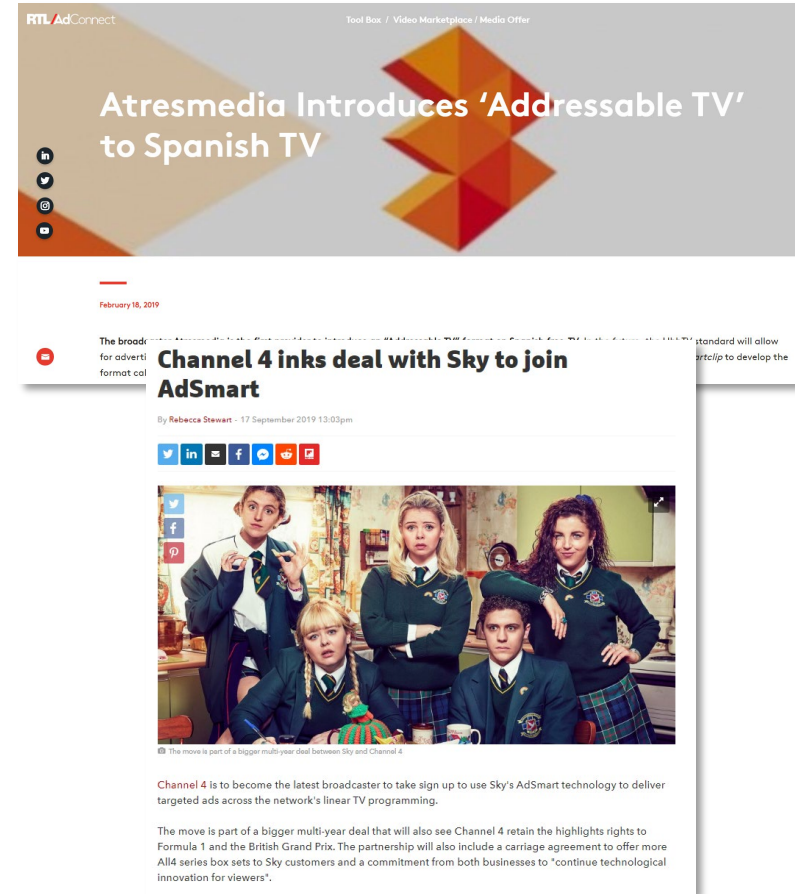
What is Addressable TV?

Targets different advertising

to different **households**

And those **individuals** living in it

Media owners can
- Deliver improved targeting
- Provide deeper, integrated inventory
- Add value

↔
↔

By
- Slicing inventory into targeted units
- Matching advertising with audiences
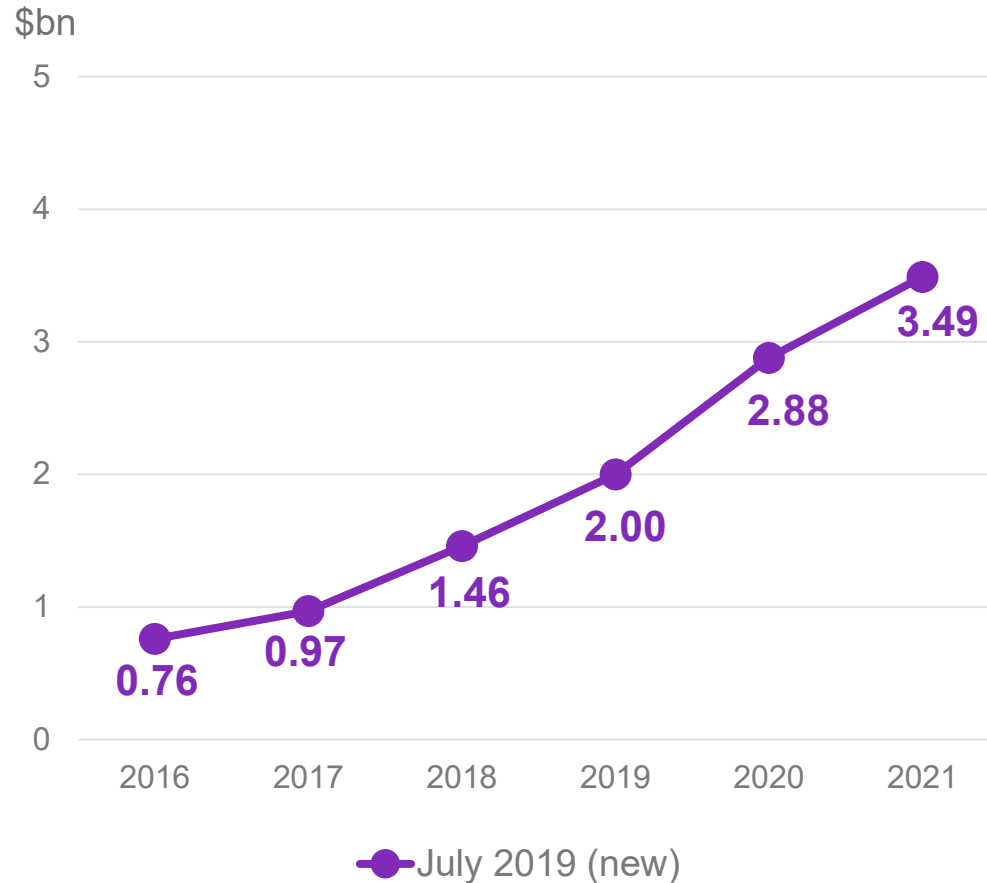
1. How do we make it effective?

2. What's the impact on the measurement ecosystem?

3. How does it connect with other forms of addressable advertising?

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Work in progress

Addressable TV growth is modest, operating in a complex ecosystem

$bn

- 0.76 (2016)
- 0.97 (2017)
- 1.46 (2018)
- 2.00 (2019)
- 2.88 (2020)
- 3.49 (2021)

July 2019 (new)

RTL AdConnect — Tool Box / Video Marketplace / Media Offer

Atresmedia Introduces 'Addressable TV' to Spanish TV

February 18, 2019

The broadcaster Atresmedia is the first provider to introduce an "Addressable TV" format in Spanish free TV. In the future, the Hb bTV standard will allow for advertising ... partclip to develop the format cal...

Channel 4 inks deal with Sky to join AdSmart

By Rebecca Stewart – 17 September 2019 13:03pm

The move is part of a bigger multi-year deal between Sky and Channel 4

Channel 4 is to become the latest broadcaster to take sign up to use Sky's AdSmart technology to deliver targeted ads across the network's linear TV programming.

The move is part of a bigger multi-year deal that will also see Channel 4 retain the highlights rights to Formula 1 and the British Grand Prix. The partnership will also include a carriage agreement to offer more All4 series box sets to Sky customers and a commitment from both businesses to "continue technological innovation for viewers".
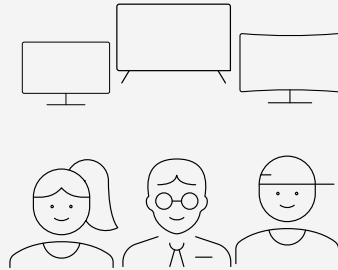
KANTAR

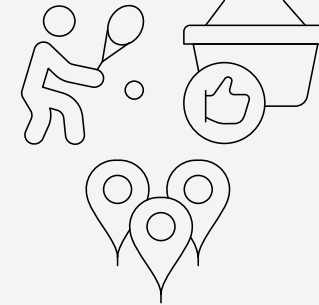# Data will fuel the growth of Addressable TV Advertising

The right

at the right

in the right

to the right

Who is watching?

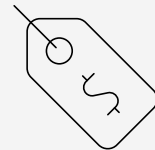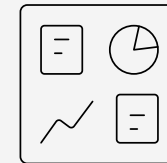**What do they need?**

Optimum price point

Excessive Frequency

Consumers are conflicted

To deliver relevance, we need data that defines
what's relevant and what's not, and to whom

54%

prefer to see ads that are
relevant to their particular
interests and needs

Relevance

56%

are concerned that more
tailored content might
compromise their privacy

Privacy

How will audience measurement fuel addressable TV advertising?

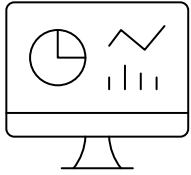**Unlock the power
of TV panels to
ensure sustainability**

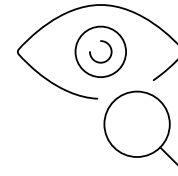**Measure and report
ads viewed by people,
not devices**

**Integrate data to enrich
the value of your
complete inventory**

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Addressable TV advertising requires ever-deeper data

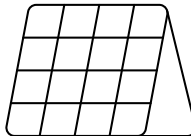**People based measurement**

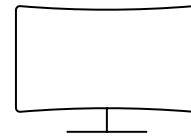- Media consumption
- Ad exposure

Census measurement of advertising and content

- Online delivery
- Linear delivery

First and third party data
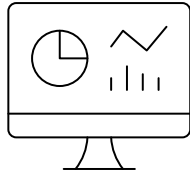
- Subscriber data
- Currency-grade segmentation

Proven methodology

Combining advertising across
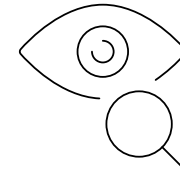
- TV
- Addressable
- Targeted ad exposure
- Reach

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Addressable TV advertising requires ever-deeper data
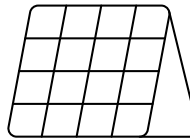
Kantar solutions for Addressable TV measurement

People based measurement

✓ Deep panel experience
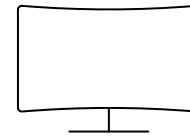✓ World class content detection
✓ Latest metering technology

**Census measurement
of advertising and content**

✓ Tagging and Tag-agnostic approaches
✓ Return Path Data

MultiChoice

First and third party data

✓ TGI@scale
✓ Return Path Data
✓ Online Census data

NUMERIS

Proven methodology

✓ CMAM (e.g. Dovetail)
✓ Fusion approaches
✓ RPD data modelling

BARB
BROADCASTERS' AUDIENCE RESEARCH BOARD

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Scaling TAM

Unlock the power
of TV panels to
ensure sustainability

Measure and report
ads viewed by people,
not devices

Integrate data to enrich
the value of your
complete inventory

Enhanced TV measurement enables addressable TV

Scaling TAM by leveraging other TV data assets

1. Large scale data from Smart TV's or Set top boxes can:

- improve granularity
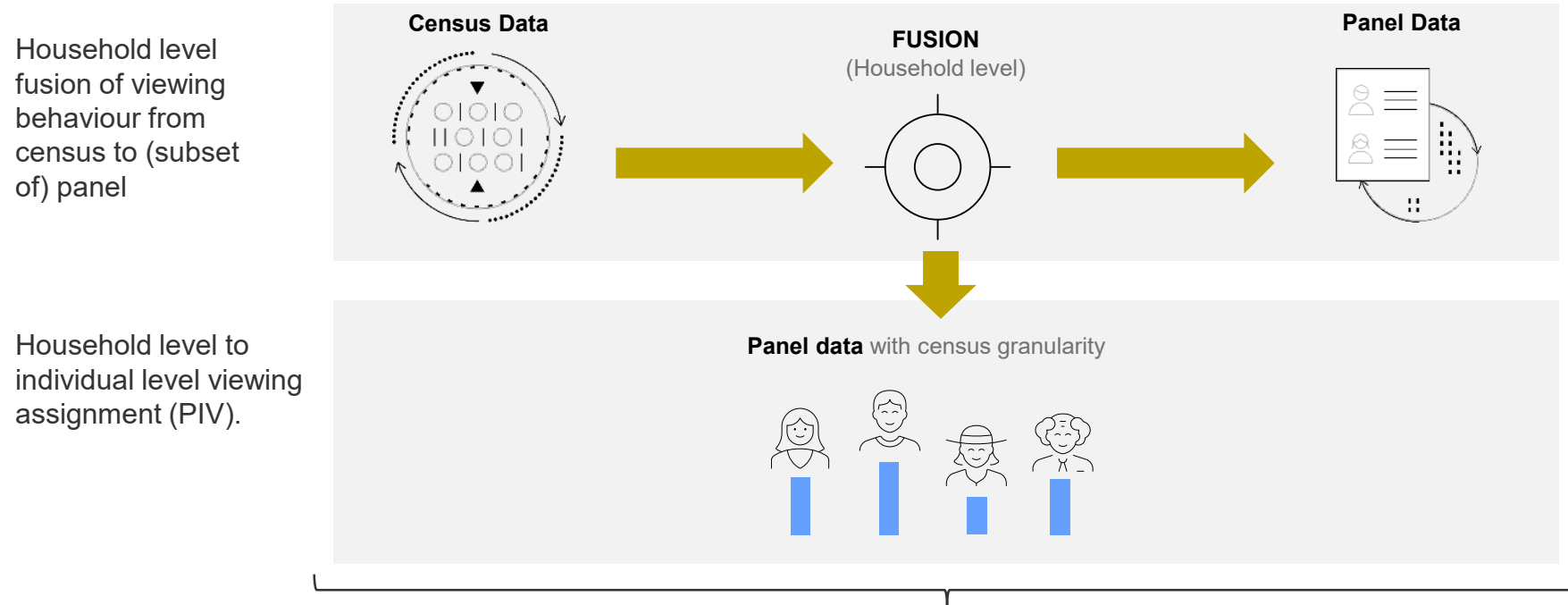- reduce zero cell ratings

2. HbbTV data can be integrated with a subset of the TAM panel having access to HbbTV data

3. Overnights include currency-grade panel demographics and reach and add significant scale by using other TV data assets.

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Enhanced TV measurement

Fusing census data from set top boxes and Smart TV's

Household level fusion of viewing behaviour from census to (subset of) panel

Census Data

FUSION
(Household level)

Panel Data

Household level to individual level viewing assignment (PIV).

Panel data with census granularity

Targeting segments into your DMP

- Subscriber information is limited or of unassessed quality.

- Disaggregated census data with demographics adds quality and depth to CRM systems

- The deliverable will adding information on a TV-set or subscriber base level.

- Enabling more enhanced segmenting of inventory based on Households demo's and TGI segments.
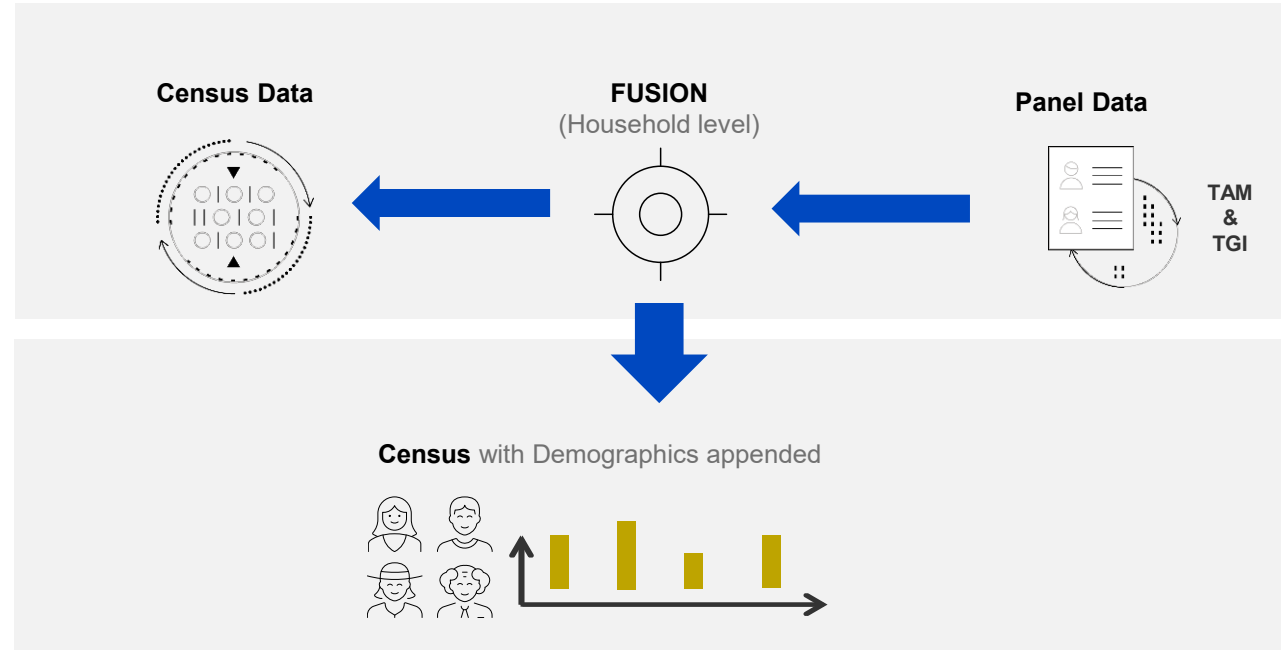

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Addressable data

Targeting segments into your DMP using enhanced census solution

Household level fusion of demographics from (a subset of) TAM onto the census

Census Data

FUSION
(Household level)

Panel Data

TAM & TGI

Assignment of (fused) census viewing to individuals

Census with Demographics appended

How can we help?

Growth through collaboration

What's your business strategy for addressable TV advertising?

How can our R&D add value to your business inventory?

How should we integrate addressable with cross-platform vision?

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