

KANTAR

**TV & Video audience
measurement
for 2020 and beyond**

Clear thinking in a complex world

Andy Brown, Richard Poustie,
Keld Nielsen and Hanne Teigum

It's risky to predict the future... but we're optimistic!

2020 predictions (from 2012)

"naked" X-ray detection technology and transparent suitcases are compulsory at airports

The year humans arrive on Mars

Budget airline introduces the first standing-only service.



Consumers have never had so much viewing choice

59%

of connected consumers claim to be able to access a subscription service, **paid for or otherwise**, on online TV or video.

Content rich environment 48%

“the subscription offers TV, shows and films that I can’t get elsewhere”

Ad-free environment 37%

“to view shows without ads”

← 11% gap →



Advertisers want to see action

“ It’s time to finally deliver cross-platform media transparency through cross-platform media measurement.

We’ve been talking about this for far too long and it’s time to get on with it.

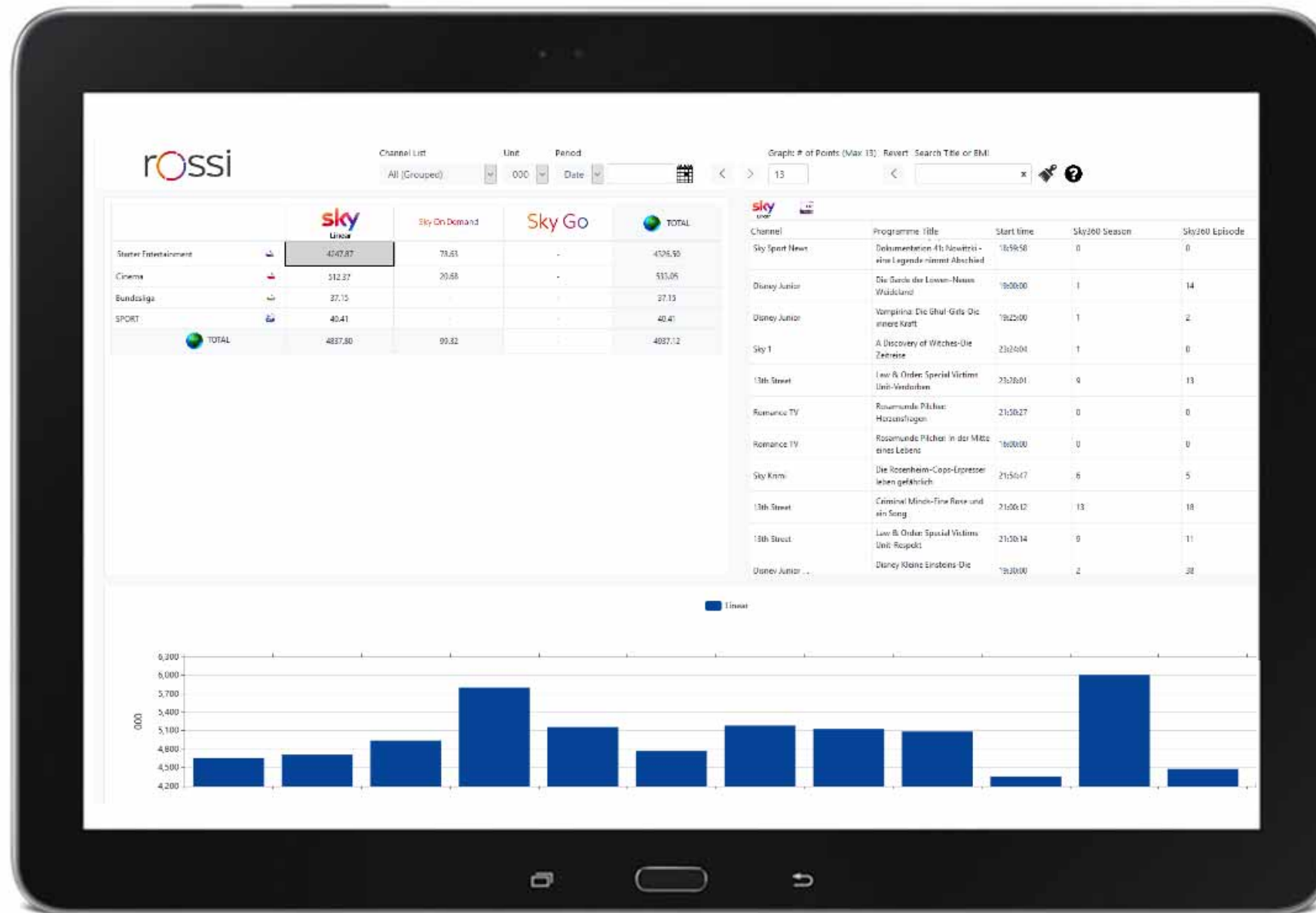
Marc Pritchard, Chief Brand Officer,
P&G ■ 11 April 2019

”



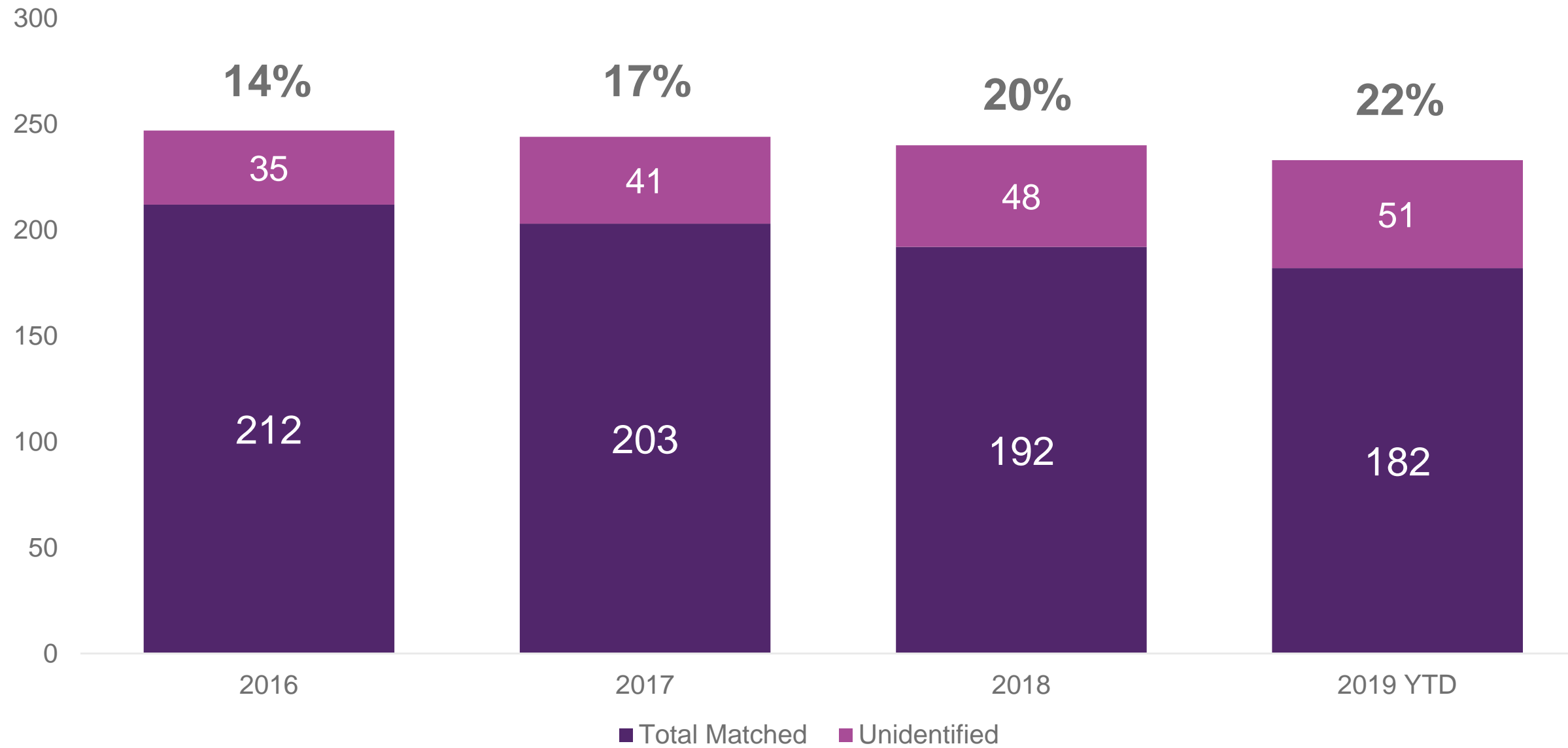
Media Owners & Platform operators compete for audience (and wallet) share

Cross-platform measurement becomes latest station on the journey



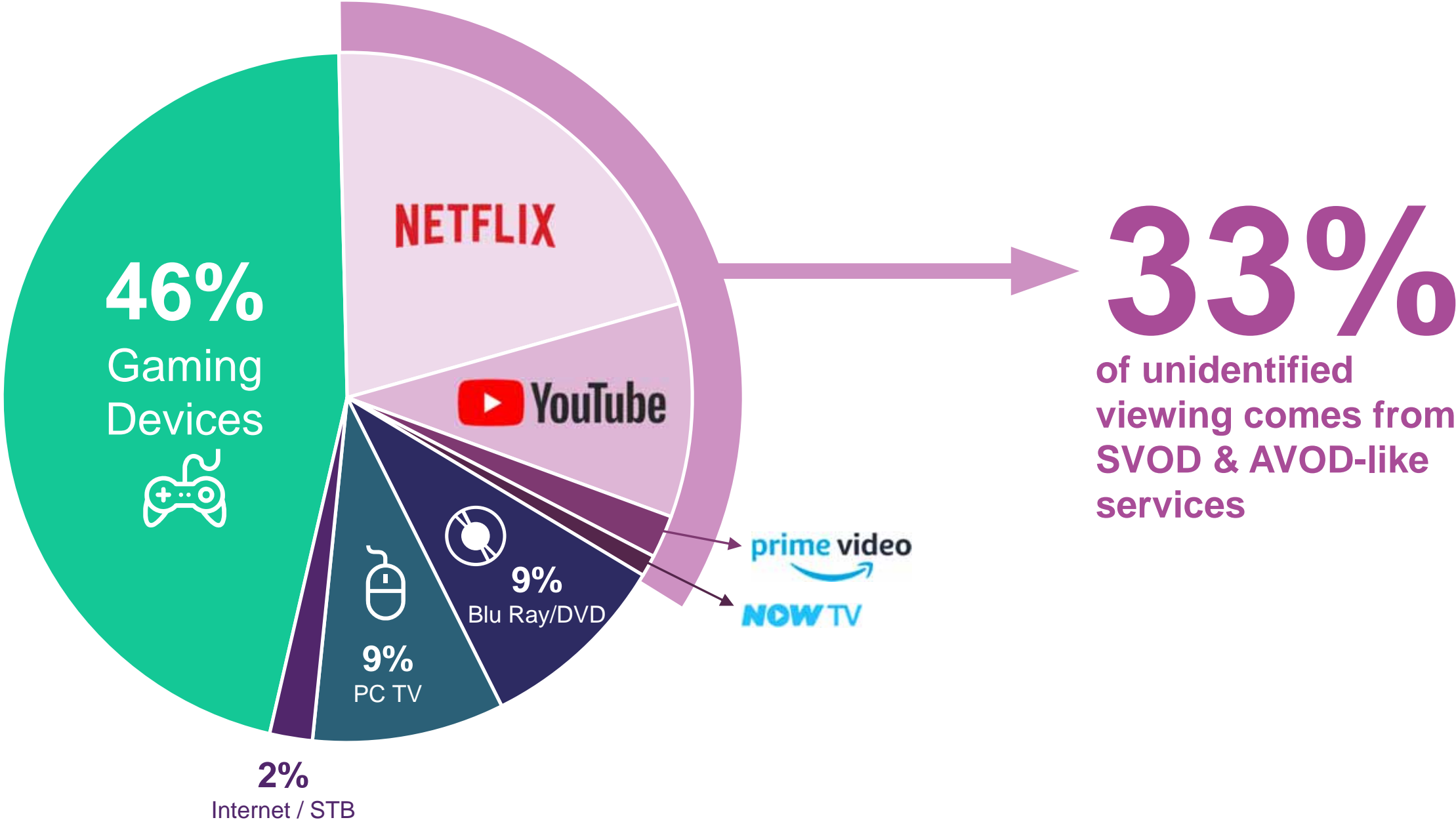
Unidentified viewing continues to grow

UK Viewing (TV Set) - 2016-2019



Addressing the rise of unidentified viewing on the TV set

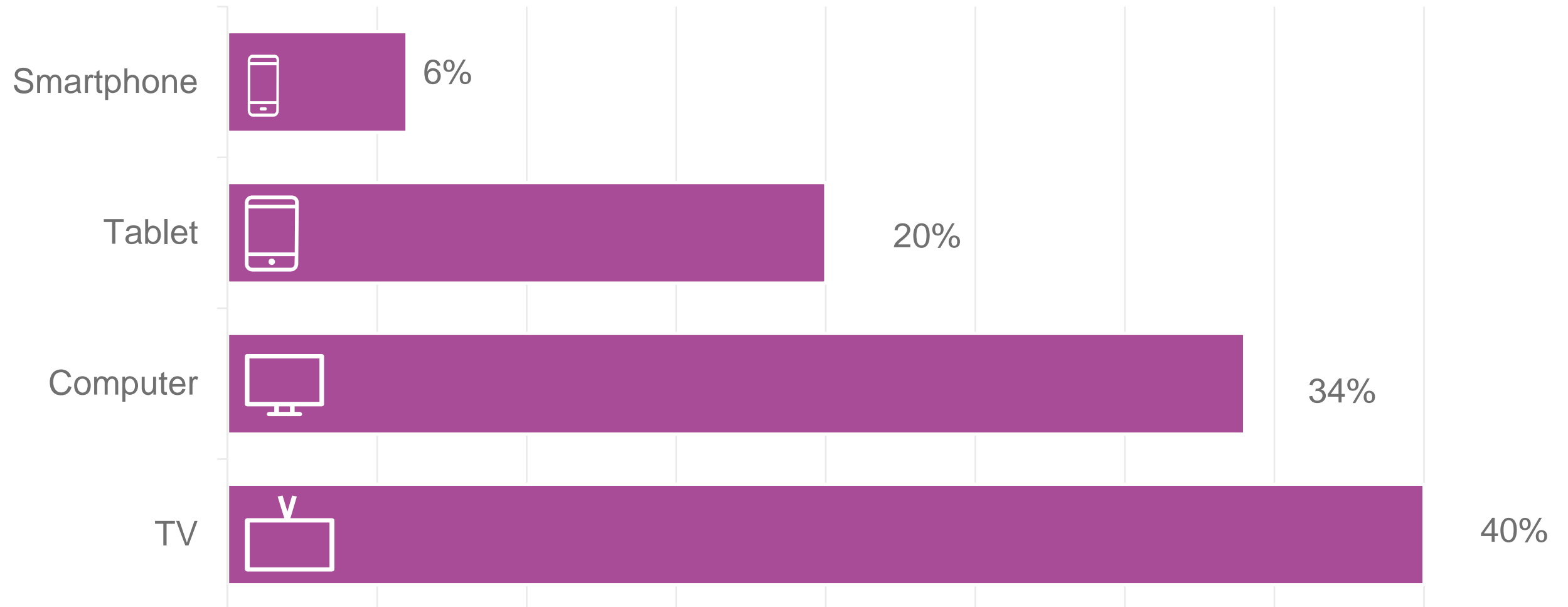
Focal Meter field trial measuring and reporting previously unidentified viewing



Reducing the unidentified: Focal Meter field trial

Netflix viewing (aggregate) by device

NETFLIX



To 2020 and beyond

Summer 2018

July 2019

Summer 2019

BARB commissions
router meter technology
field trials



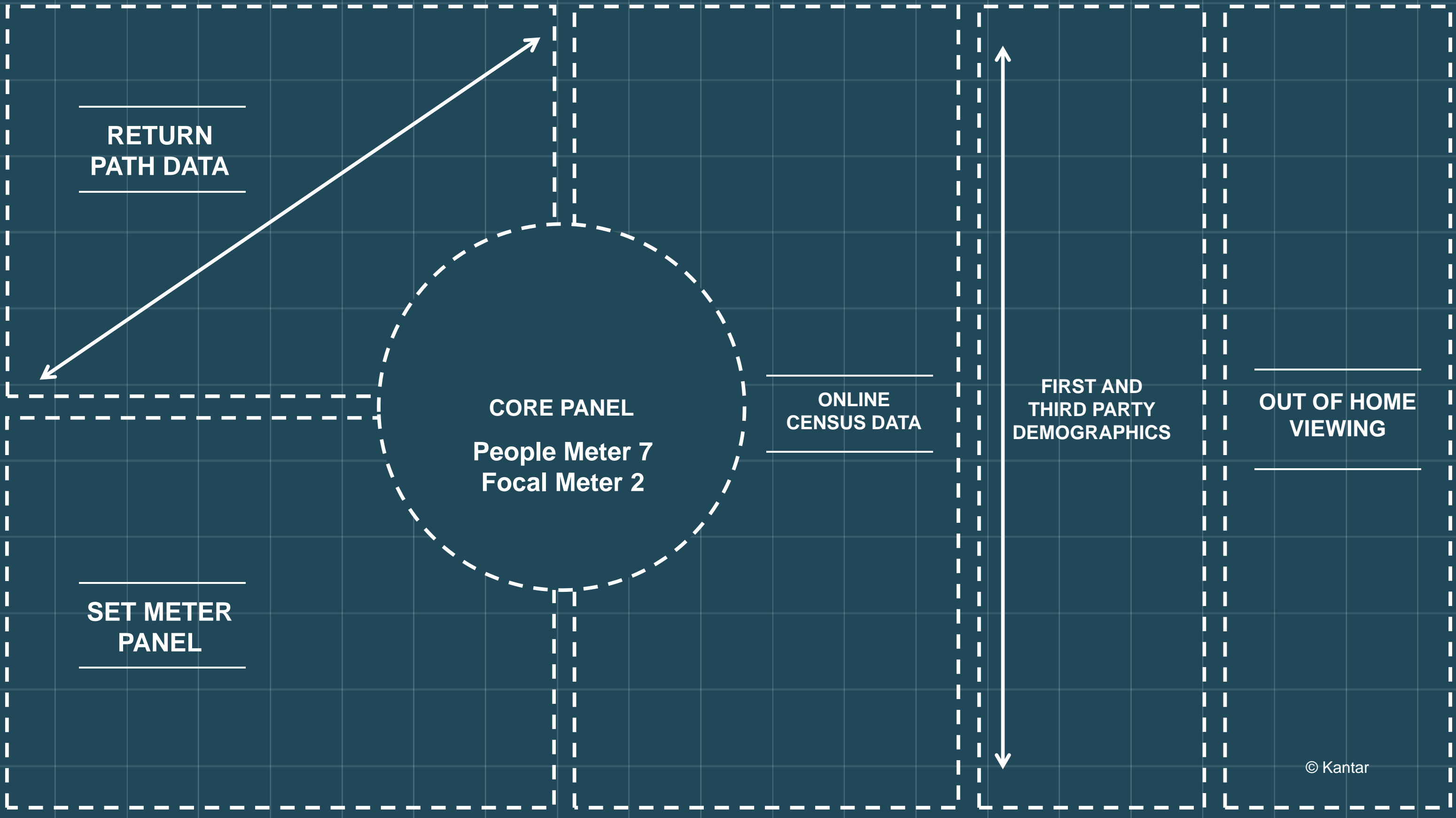
Deployment of Kantar Focal Meter (5,650 homes)
Tablet, Laptop & PC's device viewing into core service
Dovetail fusion



Kantar PeopleMeter7
Field trial (London &
South East England)

Full deployment onto the core panel will deliver:

- Smartphone viewing & profiles
- Delineate BVOD from PVR playback
- Aggregate-level metrics for SVOD and AVOD services
- Out-of-home viewing metrics (mobile devices)
- More devices measured
- Improved inputs into Dovetail fusion



**RETURN
PATH DATA**

**SET METER
PANEL**

CORE PANEL
People Meter 7
Focal Meter 2

**ONLINE
CENSUS DATA**

**FIRST AND
THIRD PARTY
DEMOGRAPHICS**

**OUT OF HOME
VIEWING**

Our People Meter 7 & Focal Meter 2 can measure all home TV & Video viewing



PEOPLE METER 7



FOCAL METER 2

All devices

- TV sets
- Smartphone
- Tablet
- PC
- Laptop
- Mac
- Smart TV
- Smart Fridge
- Google Home
- Amazon Alexa
- Gaming devices
- Smart wearables

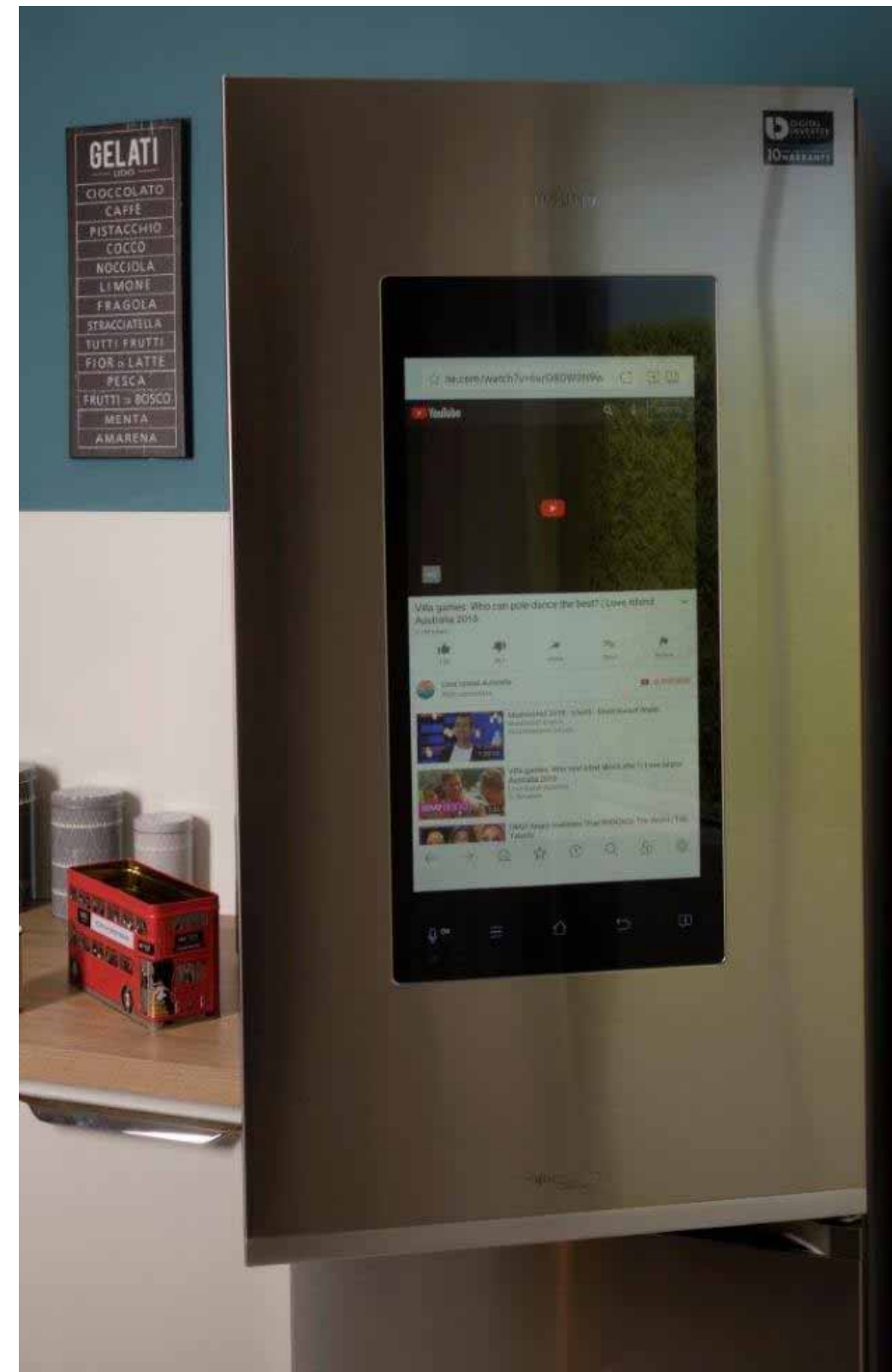
All platforms

- Live
- Time-shift
- On-demand
- Streaming
- BVOD e.g. iPlayer
- SVOD e.g. Netflix
- AVOD e.g. YouTube
- TVOD e.g. iTunes

Kantar People Meter 7




Kantar Focal Meter 2





Kantar cross-platform measurement footprint, June 2019

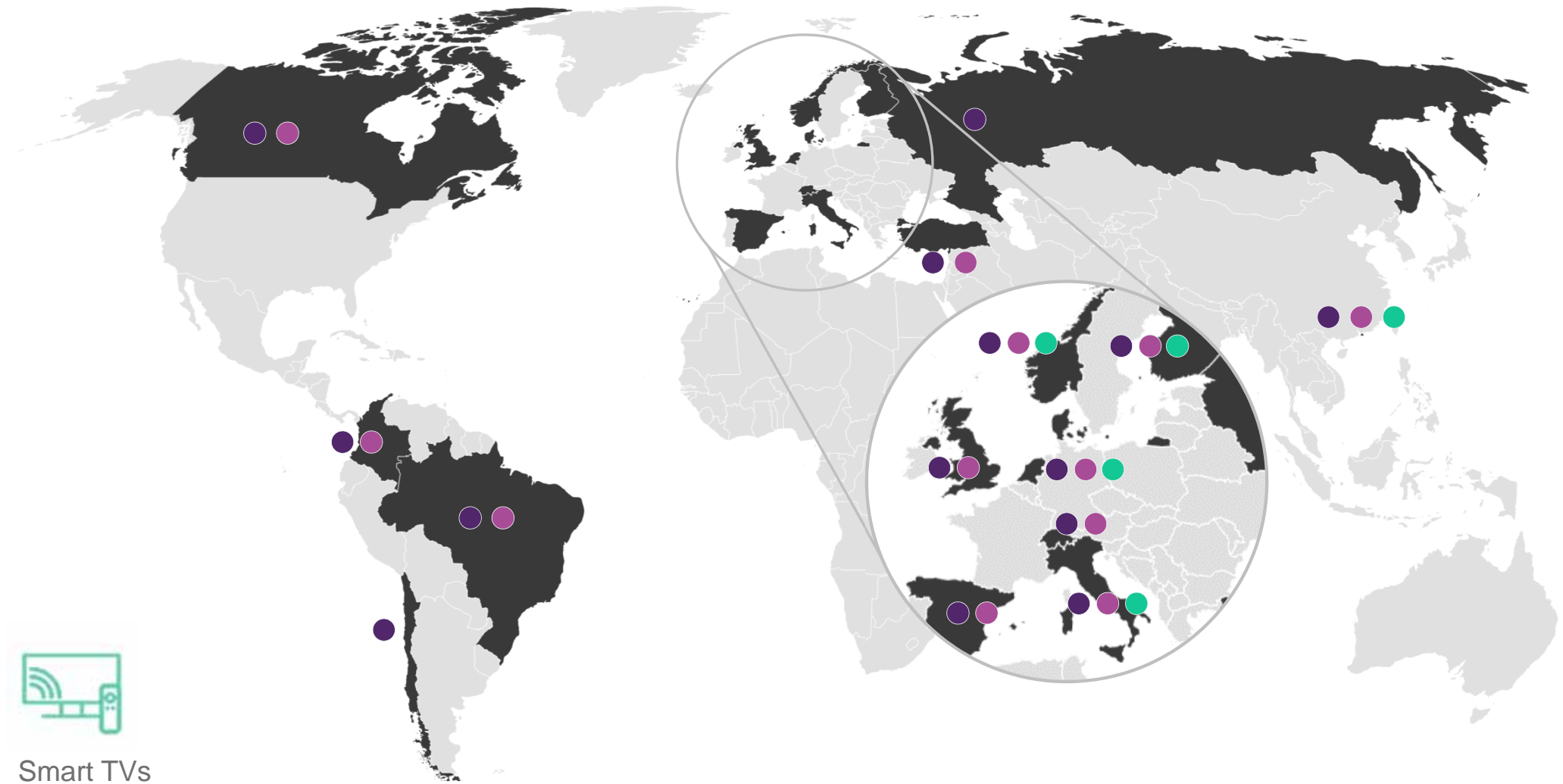
-  Brazil* III
-  Canada* III
-  Chile I
-  Colombia* II
-  Denmark II
-  Finland III
-  Hong Kong* III
-  Italy* III

-  Netherlands II
-  Norway III
-  Russia* III
-  Spain II
-  Switzerland* III
-  UK* III
-  Turkey* III

 
Computer

 
Mobile
(smartphones
and tablets)

 
Smart TVs
(and other connected
devices)



Kantar Set Meter 1

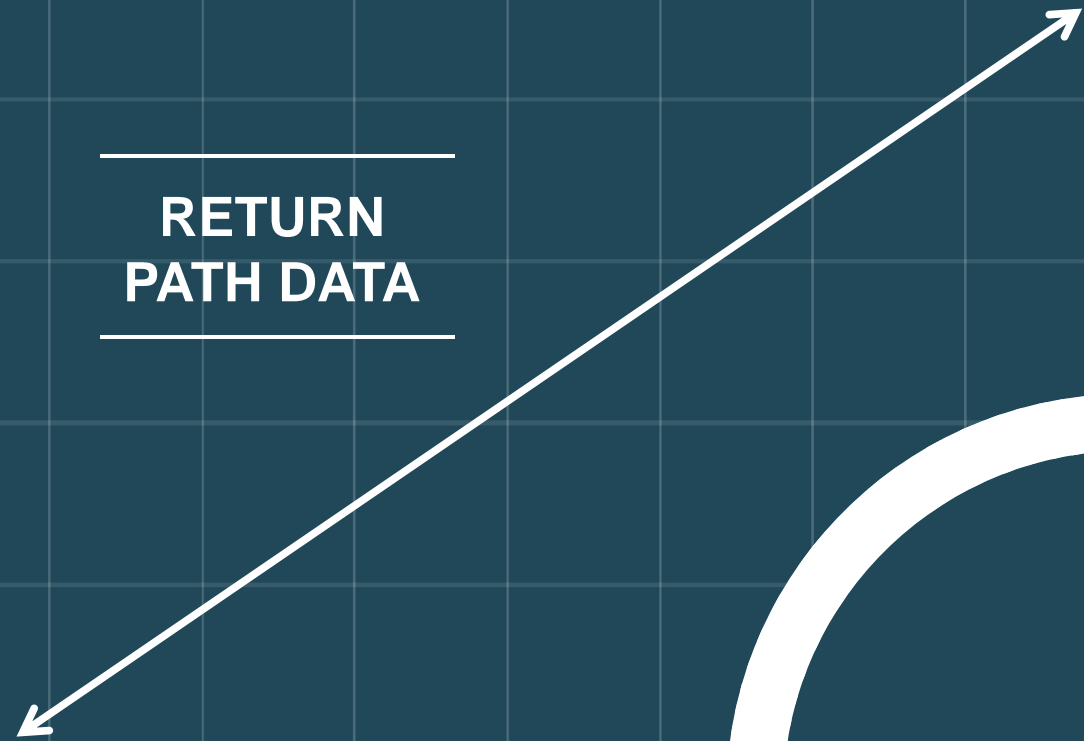


RateOnAir© 3 *with MediaMetrie*



RETURN
PATH DATA

Data
science:



CORE PANEL
People Meter 7
Focal Meter 2

ONLINE
CENSUS DATA



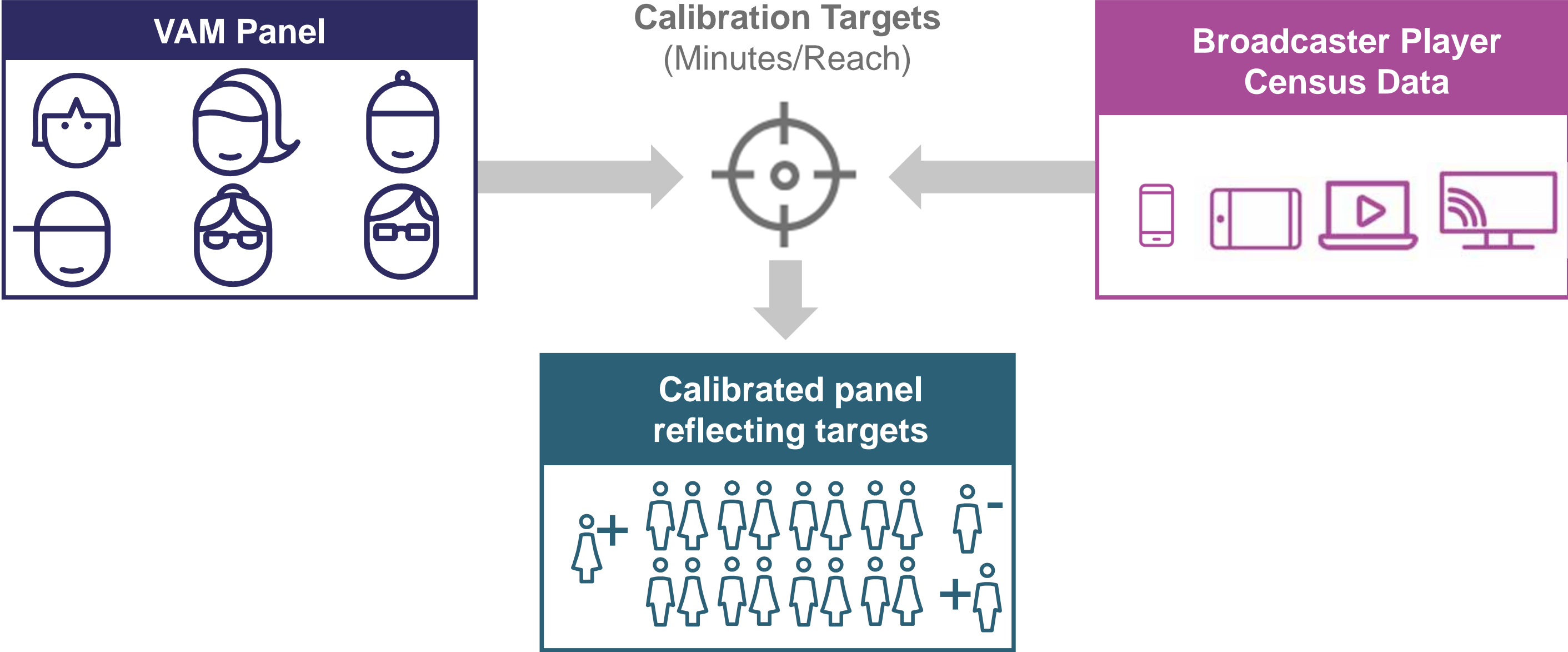
FIRST AND
THIRD PARTY
DEMOGRAPHICS

OUT OF HOME
VIEWING

SET METER
PANEL

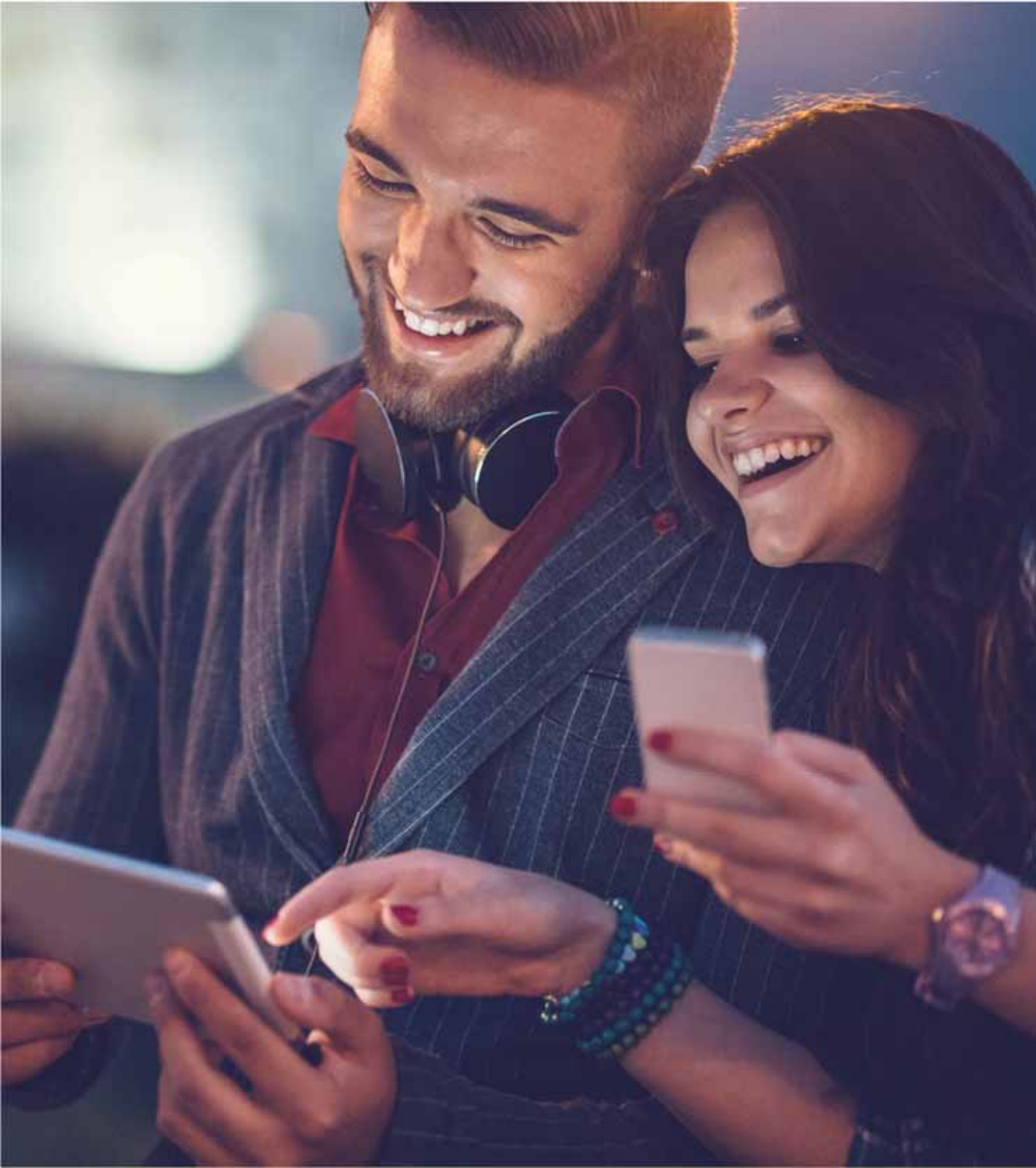
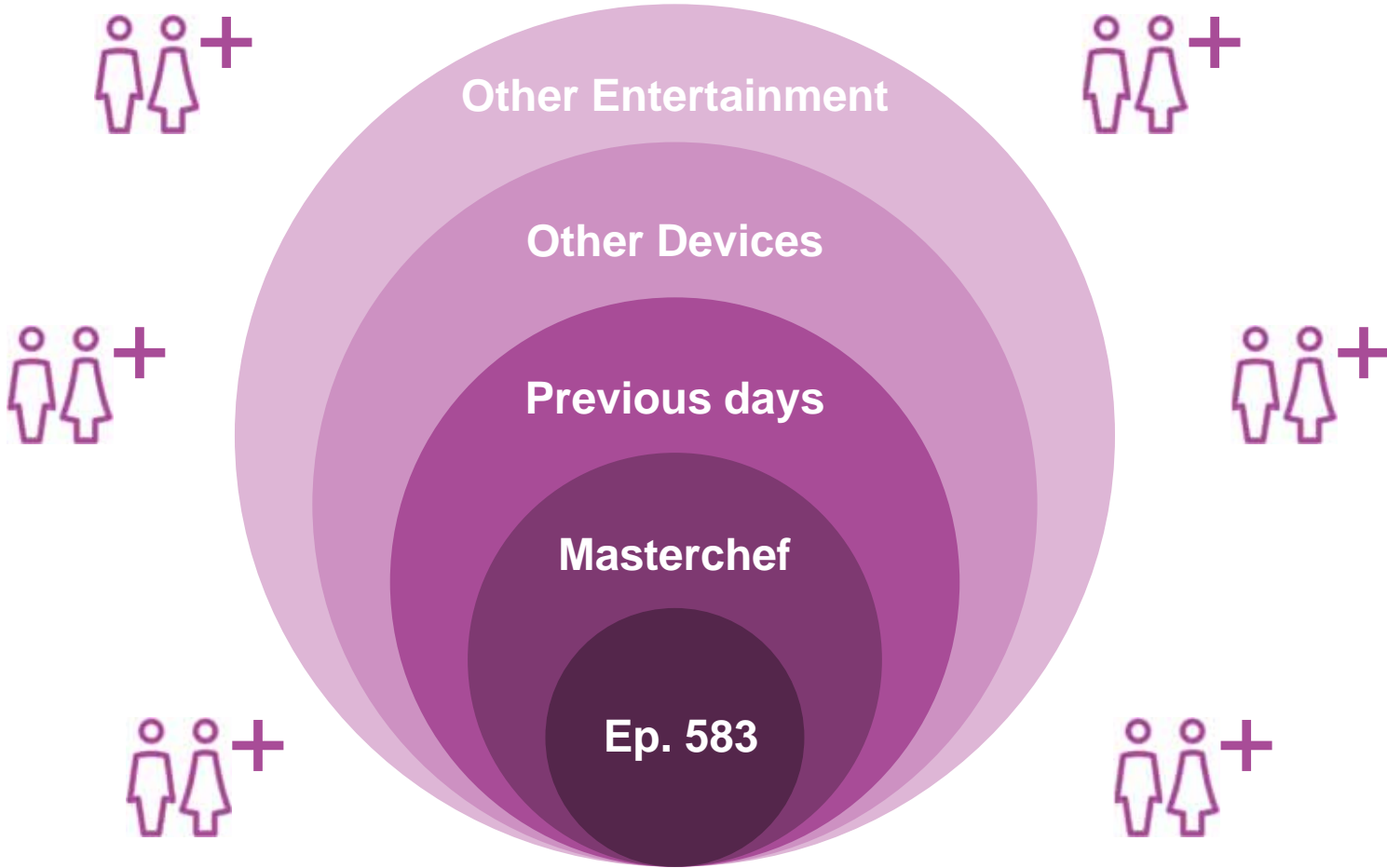
The cement
that brings it
all together

Our hybrid calibration model



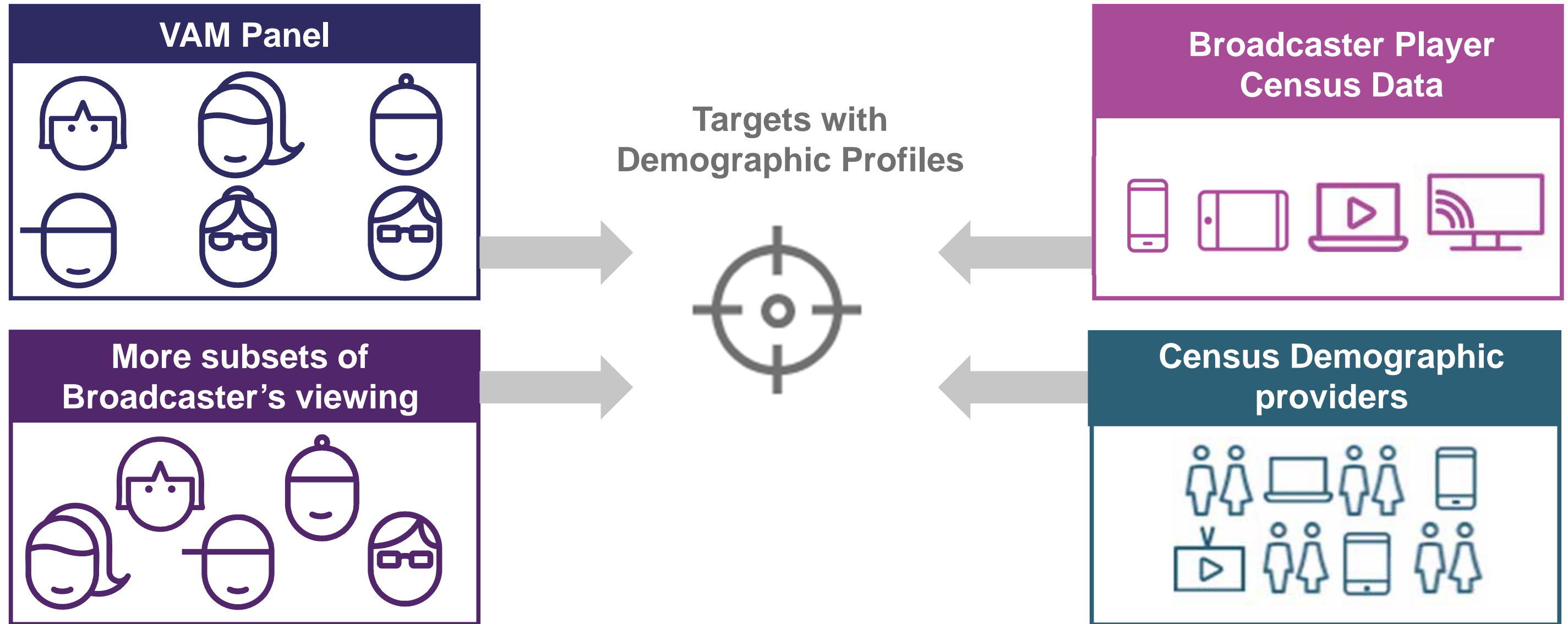
SearchNet for demographic profiling

Optimized search for sufficient viewers



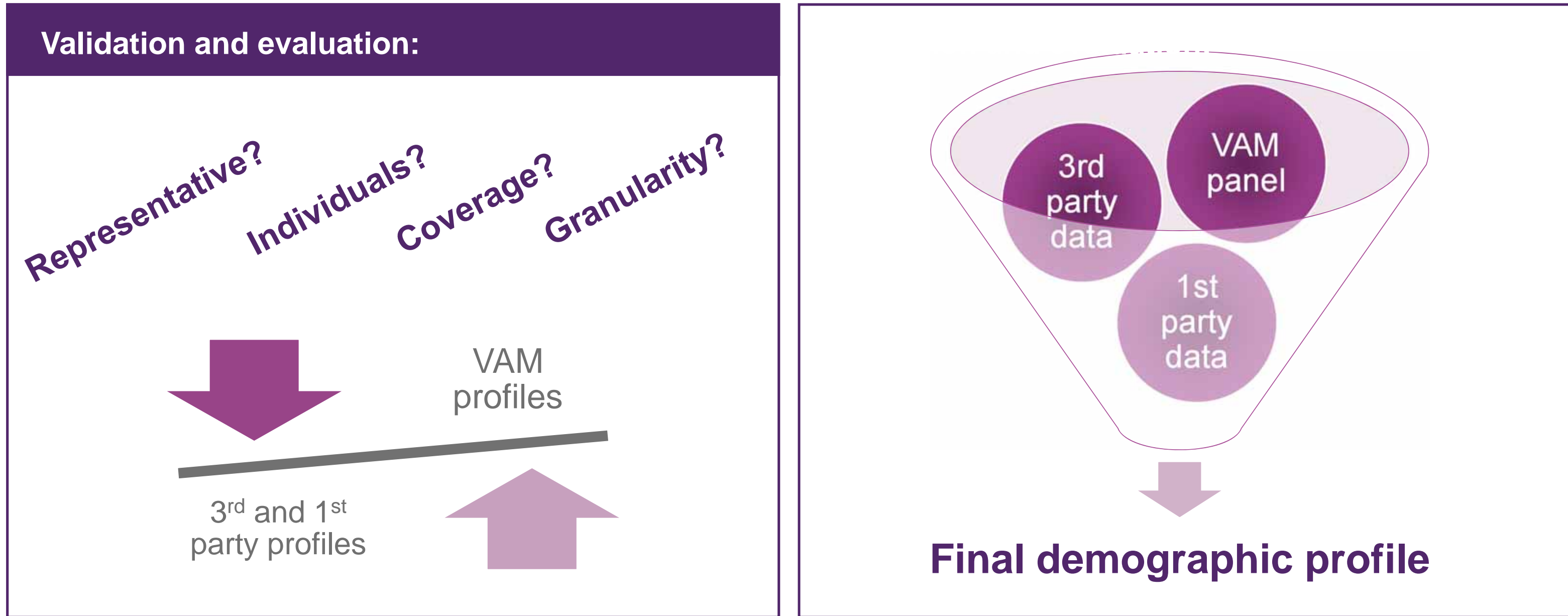
Adding first & third party data sources for enhanced demographic profiling

Larger pool of viewing with known demographics



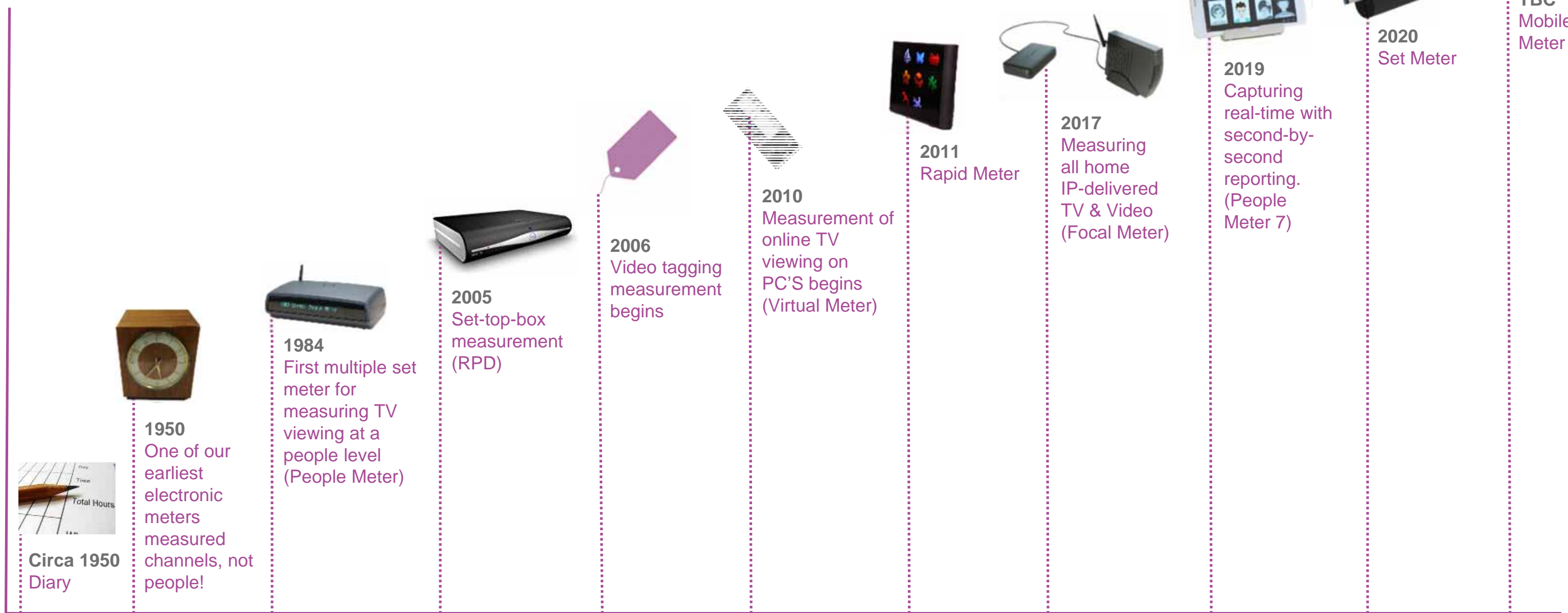
Evaluation and validation of 3rd and 1st party data

To combine available data sources into improved demographic profiles



Delivering in the present We've been leading the TV measurement world for 70 years!

Choice



Circa 1950
Diary

1950
One of our earliest electronic meters measured channels, not people!

1984
First multiple set meter for measuring TV viewing at a people level (People Meter)

2005
Set-top-box measurement (RPD)

2006
Video tagging measurement begins

2010
Measurement of online TV viewing on PC'S begins (Virtual Meter)

2011
Rapid Meter

2017
Measuring all home IP-delivered TV & Video (Focal Meter)

2019
Capturing real-time with second-by-second reporting. (People Meter 7)

2020
Set Meter

TBC
Mobile Meter

Control

Investing in the future

- Harnessing new technologies
Faster, real-time data
- Pioneering cross-platform methodologies
Reliable and robust results
- New platforms to access data
More intuitive and powerful analysis

We maintain our principles

Measurement is a team sport

**COLLABORATION
WITH AND ACROSS
THE INDUSTRY**

TRANSPARENCY

**LEGAL AND ETHICAL
COMPLIANCE**



KANTAR

Thank You
