

KANTAR

**BOLDER.
BRAVER.** The Summit
2019



Insights & Applications of Chinese
TV & Online Video Data with iQIYI
& Tencent

TV + OTT Single-Source Audience
Measurement

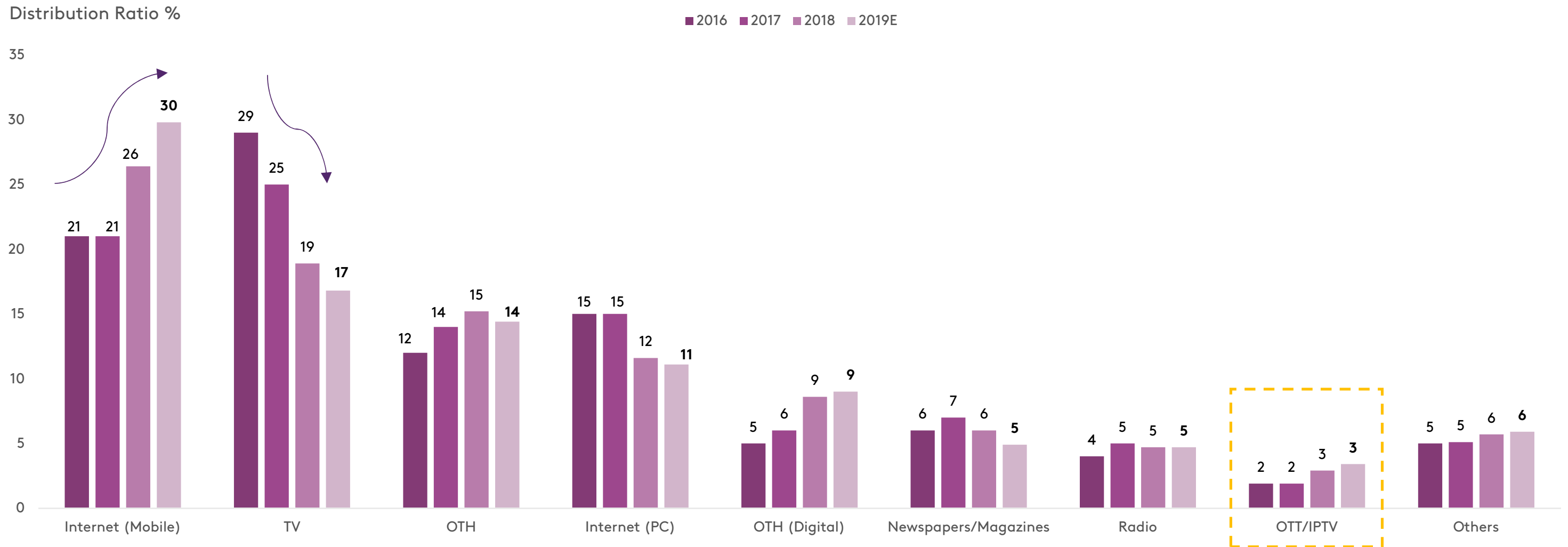
Andrew Li Cheng, CSM Media Research

Chengzhi Ge, iQIYI

Bodi Li, Tencent Video

Decline in Linear TV Commercials' revenues in the past 4 Years in China has flowed to the internet and mobile screens

Budget Allocation of Various Media Ads (%)



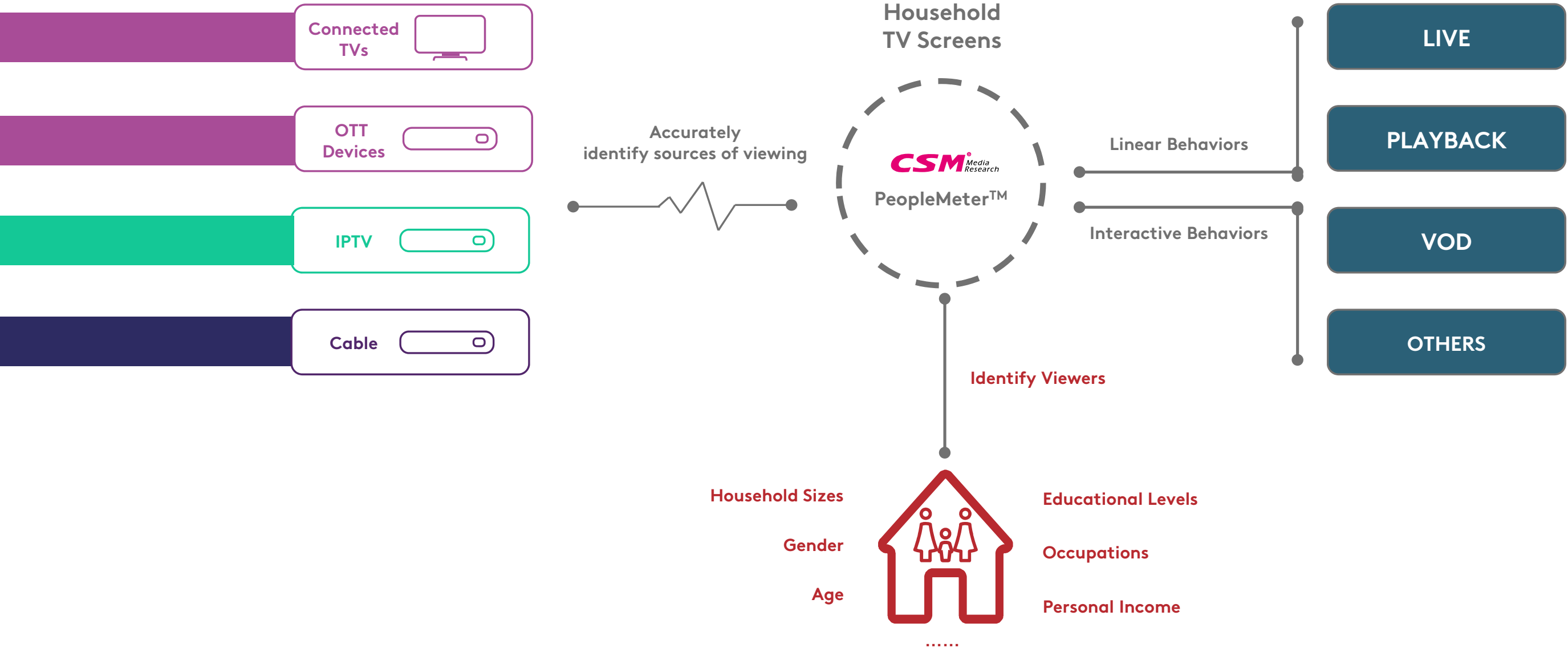
Data Source: Statistical Bulletin of the National Radio and Television Industry in 2018; The 43rd Statistical Report on the Development of China's Internet Network; 2019 Advertiser Marketing Trend Report, CTR

As Digitalization of Viewing Devices Continues in China, Coverages of IPTV/Connected TV Households in Key Cities Grows Further

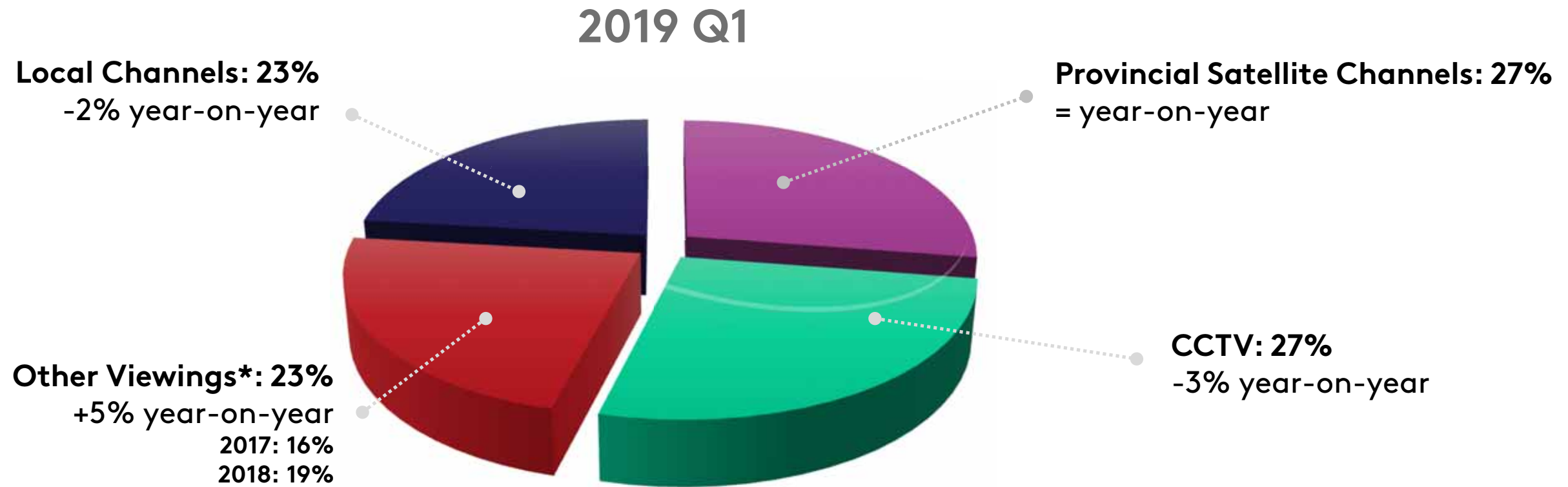


Data Source: CSM's Annual Establishment Survey

PeopleMeter Collects Linear and Interactive Viewing Behaviors from All Devices Connected to TV



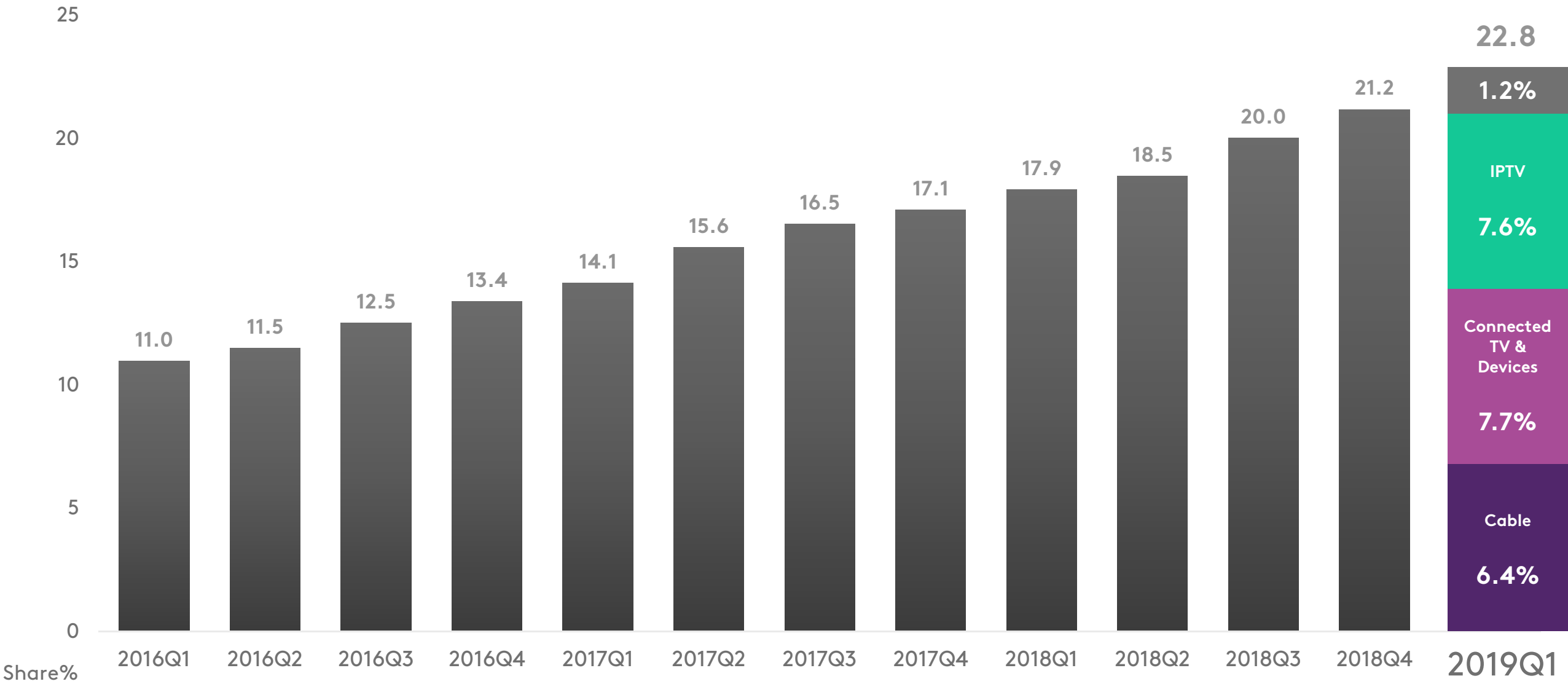
Other Viewings' Share% Continues to Increase Year-to-Year



*Other Viewings includes viewings from playback, on-demand, digital-only channels and other interactive applications.

Data Source: CSM TAM Data, 2019Q1, 52 Cities

Usage of Interactive Services from 3 Main Platforms Divided Other Viewings' Share%










*Other Viewings includes viewings from playback, on-demand, digital-only channels and other interactive applications.

Data Source: CSM TAM Data, 2019Q1, 52 Cities













Advertisements on Connected TVs Becomes the New Focal Point for Advertisers in China

						
Boot Ads	Launcher Ads	Screensaver/ Standby Ads	Shutdown Ads	TV Mall Ads	Sponsored Ads	Branded Ads

System-level Ads

Launcher & APP-level Ads

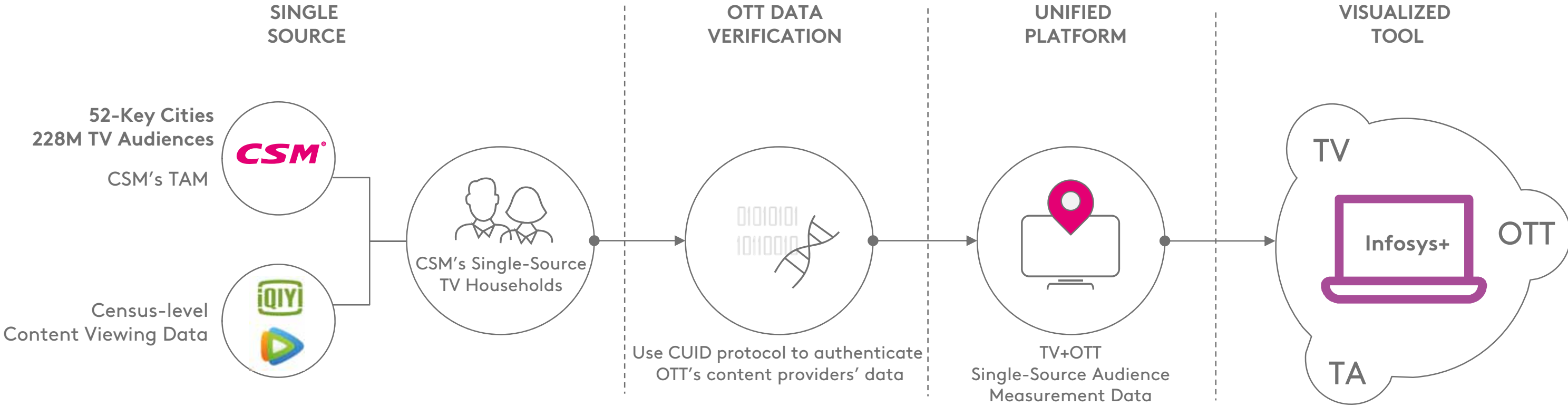
 	 				
		APK Launch Ads	Corner Ads/ Band-aid Ads	Pre-roll Ads	Pause Ads
					
		Midroll Ads	Desktop Ads	Banner Ads	Standard Ads

CSM Started Pilot Projects with iQiyi & Tencent on “TV+OTT Single-Source Audience Measurement” in 2018



A comprehensive measurement & evaluation system to assess audiences from linear TV and connected TVs & devices' on-demand platforms

How Does It Works?



Audiences of On-Demand Platforms on Average Spent 2 Hours Daily Viewing Content

TOP20 Linear Channels



2018Q3

iQIYI's Galaxy Internet TV

Ratings 0.068%

Share 0.75%

AvAud(View) 125

iQIYI's audiences averaged viewed 125 mins per viewer per day
Data Source: CSM TAM Data, 2018Q3, 52 Cities

Tencent's Internet TV

Ratings 0.034%

Share 0.38%

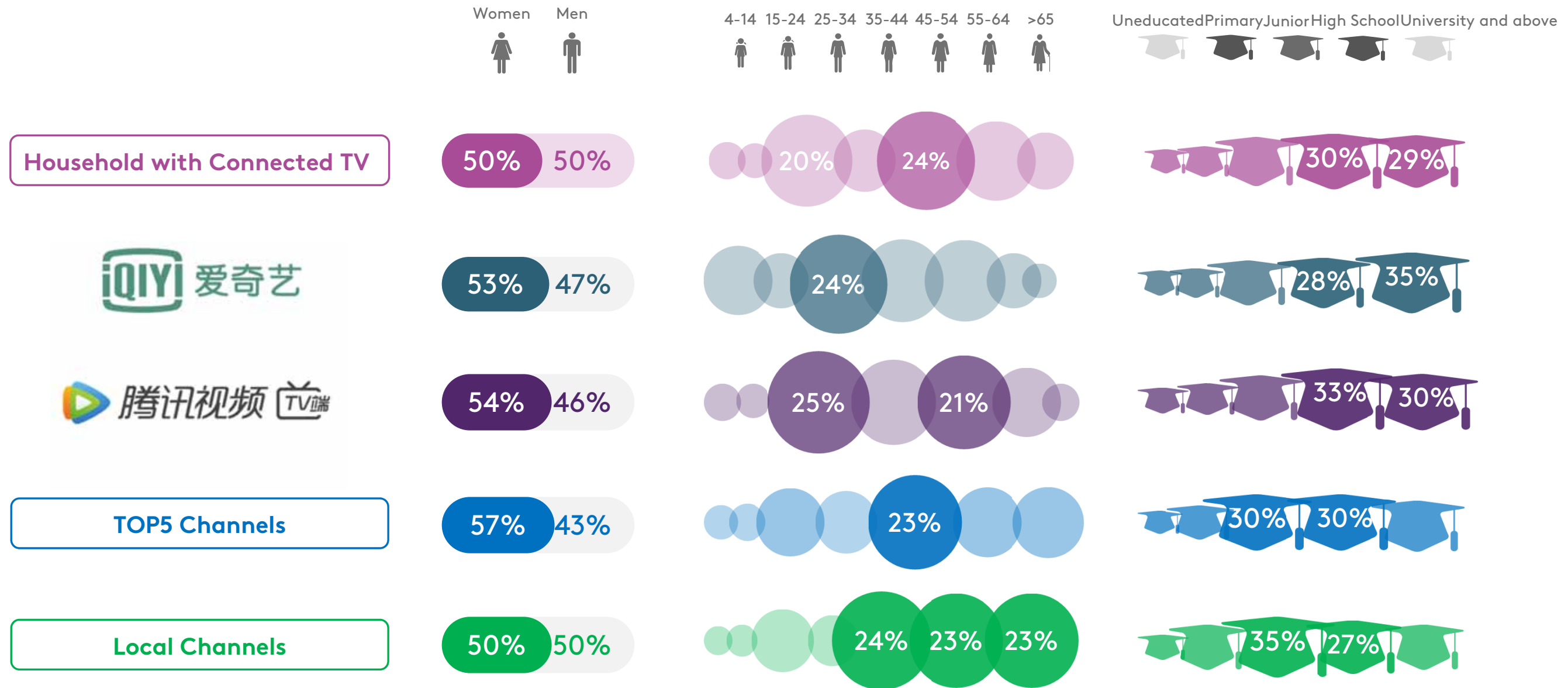
AvAud(View) 119

Tencent's audiences averaged viewed 119 mins per viewer per day
Data Source: CSM TAM Data, 2018Q4, 52 Cities

Channels	Ratings	Share	AvAud(View) [minutes]
CCTV General Channel	0.346%	3.82%	38
CCTV-4	0.334%	3.69%	43
CCTV-8	0.277%	3.05%	46
CCTV-6	0.274%	3.03%	34
Beijing Satellite	0.234%	2.58%	44
CCTV-3	0.226%	2.49%	34
CCTV-5	0.225%	2.49%	39
Zhejiang Satellite	0.218%	2.41%	43
CCTV News Channel	0.210%	2.32%	35
Dragon TV	0.198%	2.18%	41
Hunan TV Satellite Channel	0.188%	2.08%	39
Jiangsu Satellite	0.187%	2.06%	37
Hunan TV Golden Eagle Cartoon Network	0.114%	1.25%	38
CCTV Youth Channel	0.109%	1.21%	32
Shandong Satellite	0.108%	1.19%	34
Anhui TV Satellite Channel	0.097%	1.07%	31
CCTV-10	0.088%	0.97%	20
Beijing Kaku Children Channel	0.084%	0.93%	29
CCTV-2	0.084%	0.93%	18
Tianjin Satellite	0.077%	0.85%	28

Data Source: CSM TAM Data, 2018H2, 52 Cities

Audiences of On-Demand Platforms are Younger, and Highly Educated



Data Source: CSM TAM Data, 2018H2, 52 Cities

What Can We Do with The Data?

For Agencies

- Present overall viewing from all devices connected to a TV screen for ad budget allocation
 - Restore true co-viewing behaviors on TVs with individual-based ratings results

For Advertisers

- Understand max viewing volume of OTT on-demand platform
- Strict census-level data verification process to ensure data quality for investment
- Accurate target audiences' demo to help improve delivery efficiency

For On-demand Content Platforms

- Use common metrics to evaluate on-demand platforms with live broadcasting channels
- Realize their media advantages and help define content and ad values in sales

For Media Researchers

- Alternative method to work with content providers who may not want to use tag or coding

How Can We Further Enhance The Product?

- Extends same methodology to work with IPTV, DVB, and content providers, and identify true value of all parties in a big screen environment while helps advertisers standardize data measurement of all planforms on TV.
- Helps media industry to identify changes in audiences' viewing behaviors and provides guidance in program production, distribution and advertising transactions.
- Creates advertising planning and effectiveness evaluation system for boot, linear, on-demand and other ad formats to provide practitioners with convenient and efficient cross-platform MIX reach tools.



Thank you!