

The Kantar logo, with the letter 'K' in a bold, yellow font and the remaining letters 'ANTAR' in a white, sans-serif font.

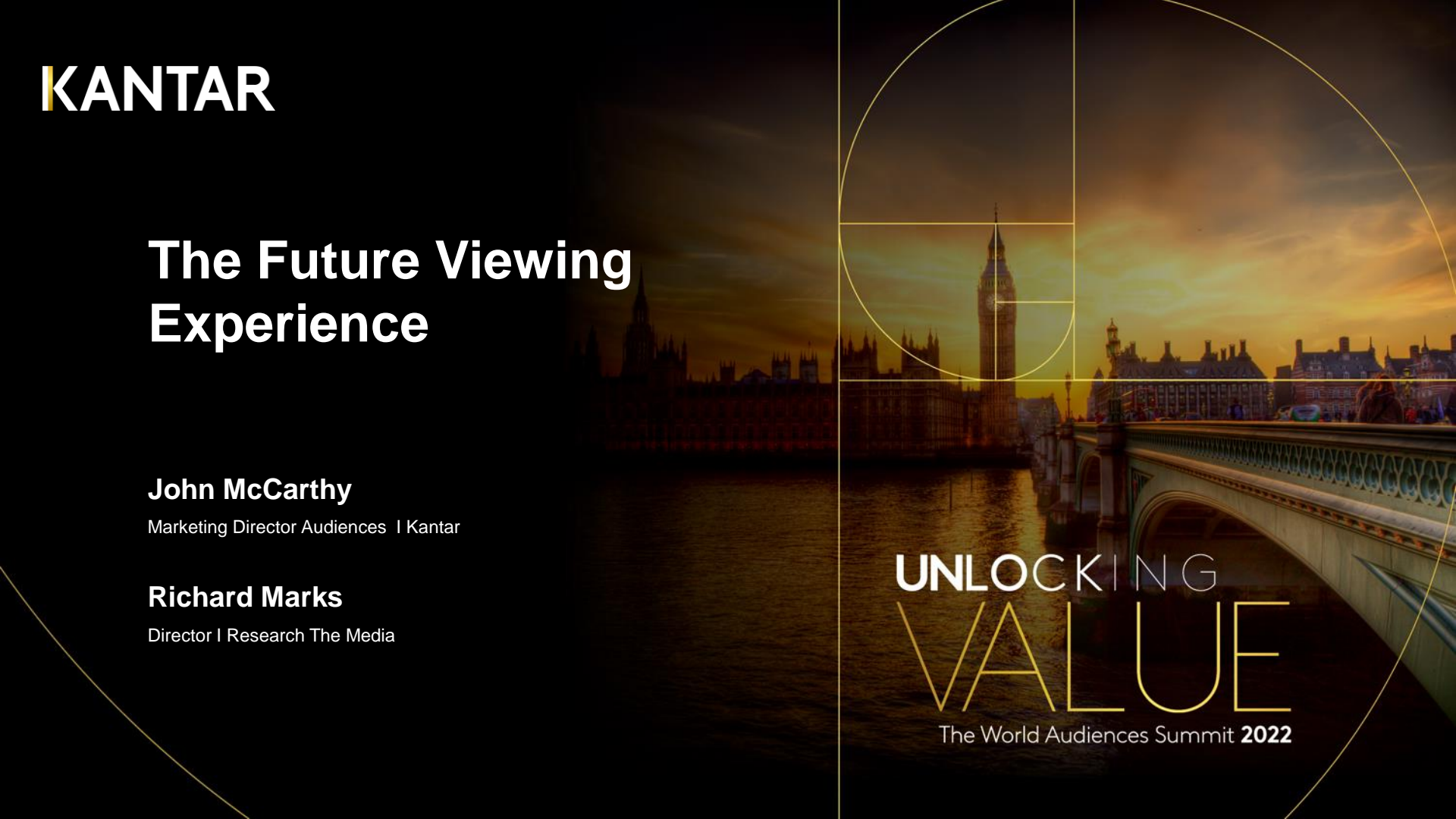
The Future Viewing Experience

John McCarthy

Marketing Director Audiences | Kantar

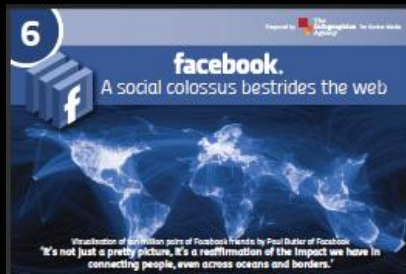
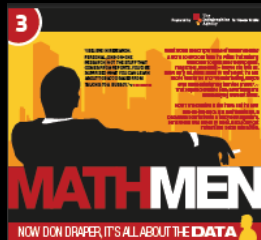
Richard Marks

Director | Research The Media

A photograph of the London skyline at sunset, featuring the Big Ben clock tower and the Houses of Parliament. The scene is viewed through a circular frame with a golden grid overlay. The sky is a mix of orange, yellow, and dark blue, and the water in the foreground reflects the light.

**UNLOCKING
VALUE**

The World Audiences Summit **2022**



2013

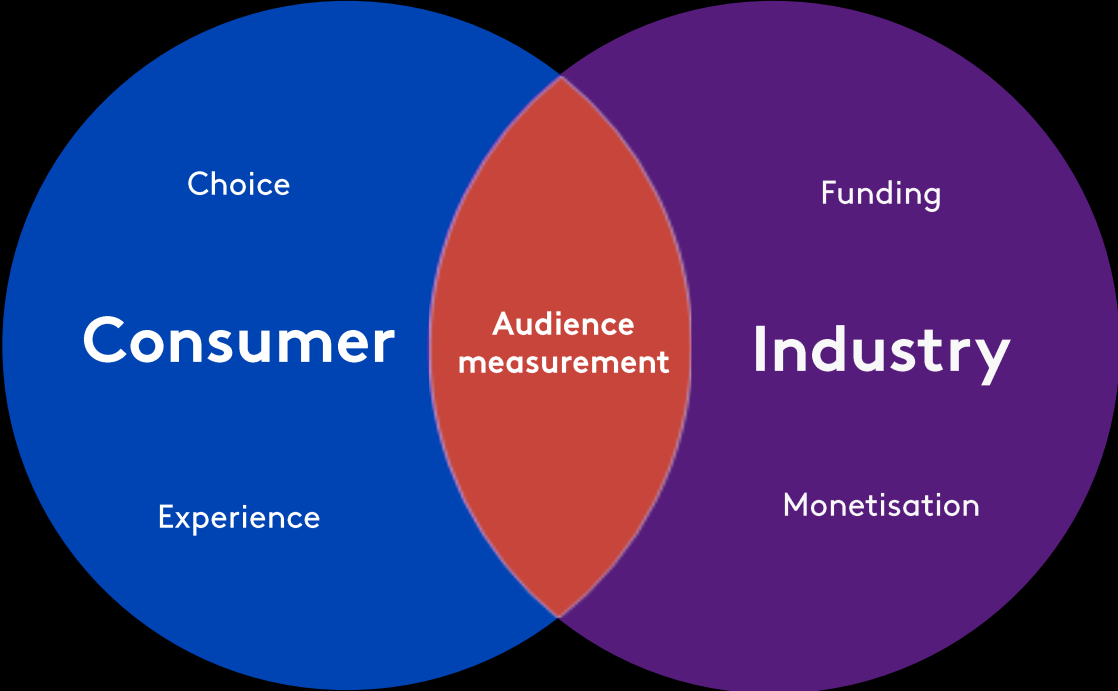
The rise of data-driven advertising decisions

A multi-platform future with TV set viewing at its core

Viewing forms: the dominant cultural and advertising channel of choice



An objective appraisal of the future viewing landscape



What does the future viewing experience look like?

The battle to
control the
viewing
gateway



Evolving strategies
for audience
retention, growth
& monetisation



New growth
opportunities
for advertising



It's all about
the data: the
viewer value
exchange



What does the future viewing experience look like?

Content
& Delivery



Viewer
Behaviour



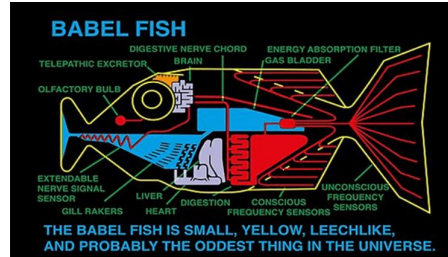
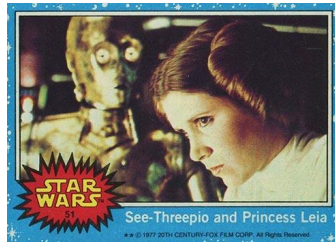
Advertising



Data



Eight images with a story to tell...

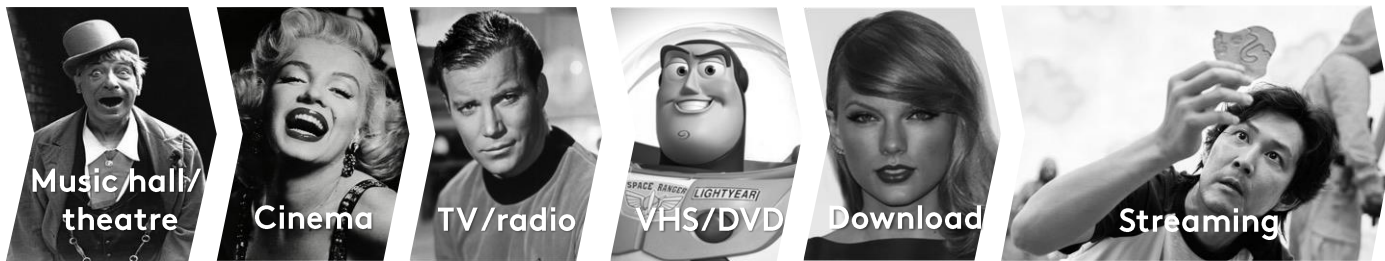


... about the future viewing experience

1.
Direction of travel



Direction of travel



Public

Private

Social?

Virtual?

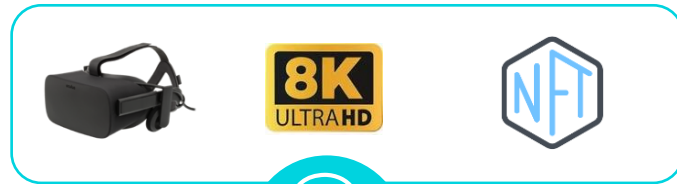
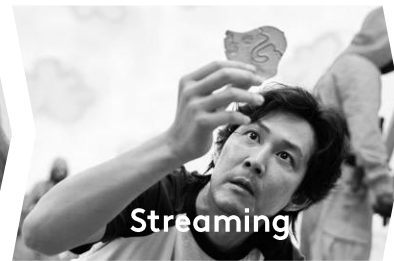
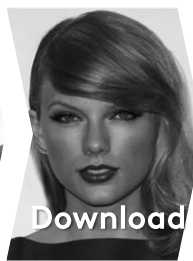
Access

Ownership

Unlimited Access

Frictionless?

Detours and false dawns



The future viewing experience is not about what technology can do,
but by how TV and video are actually watched



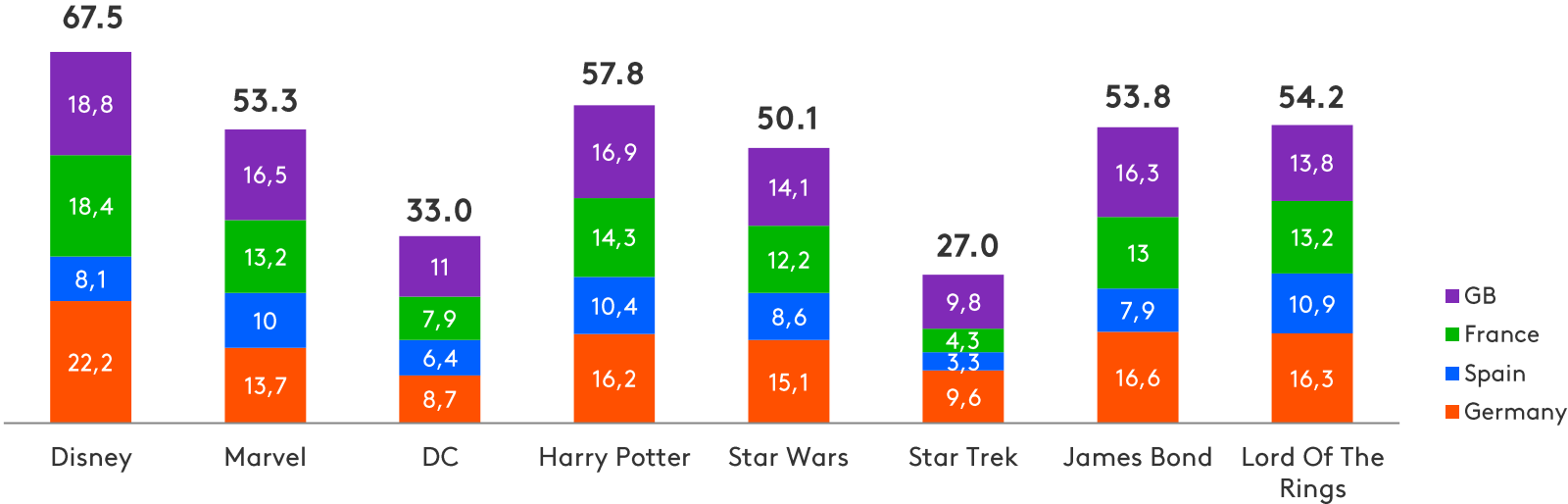
2.

Content brands, vertical integration and D2C



Fans of film franchises

(millions)



NETFLIX
— AT —
SHEPPERTON
STUDIOS

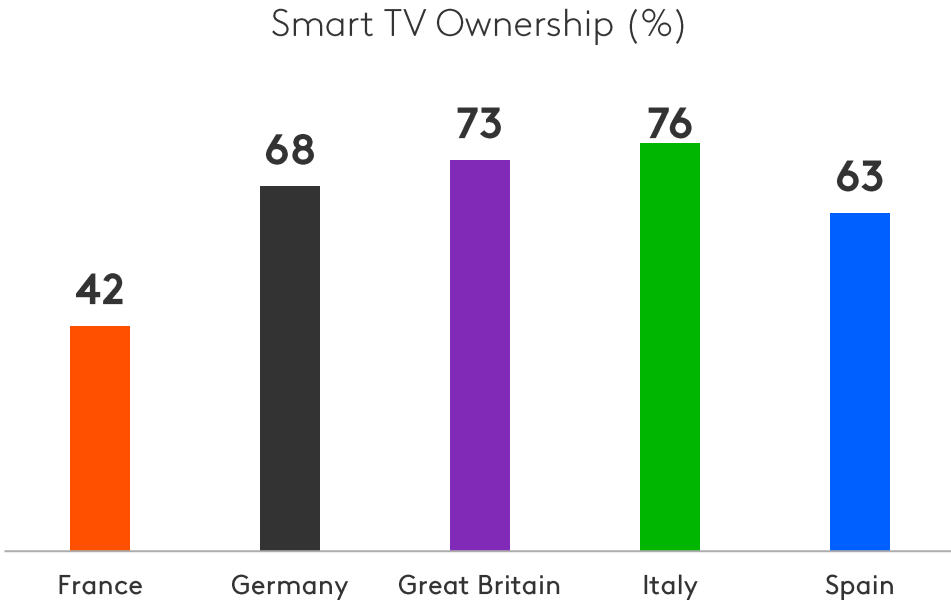


3.

**The battle to control
the content gateway
into the home...**

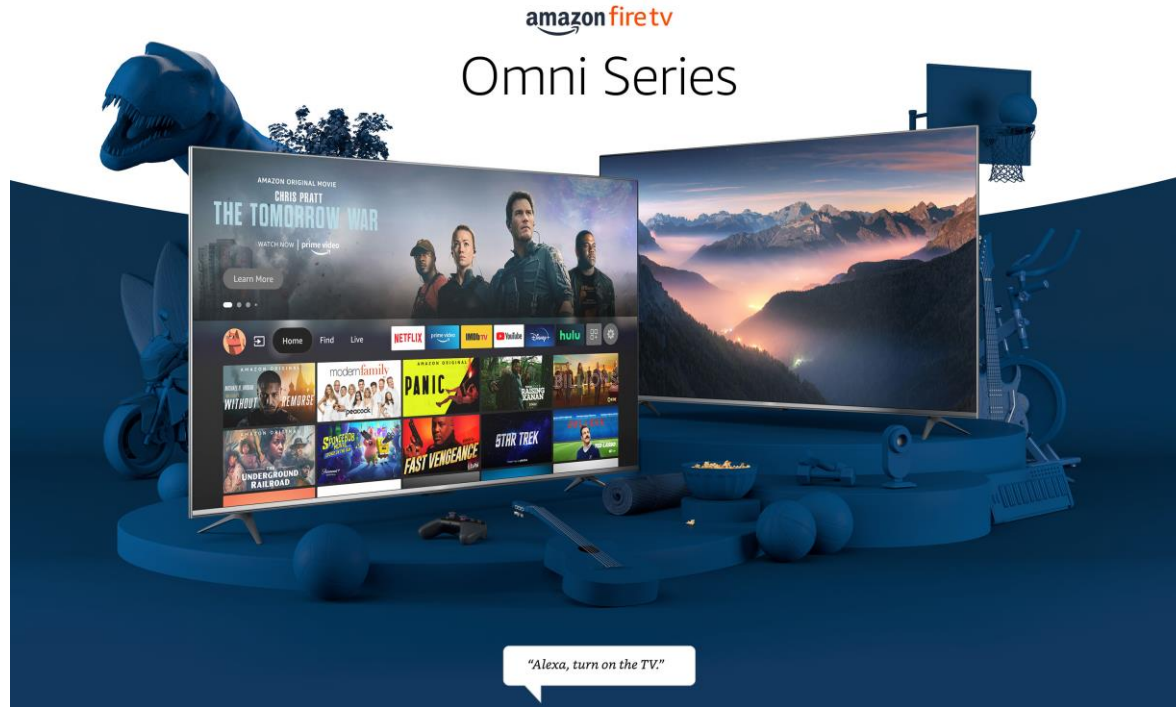


Will the 2020s be the decade of the TV set?





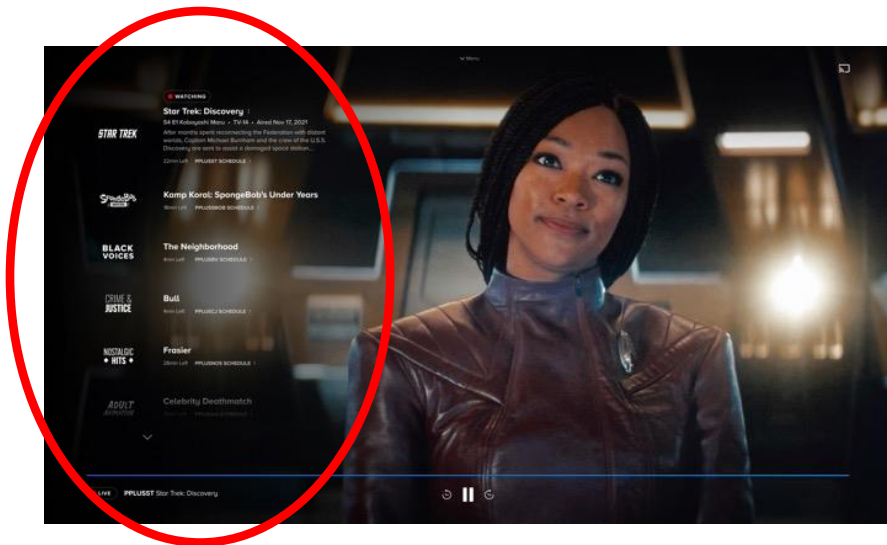
The battle to control the content gateway into the home...



4.

The winners in the platform wars will strike the right blend between linear and VOD





5.

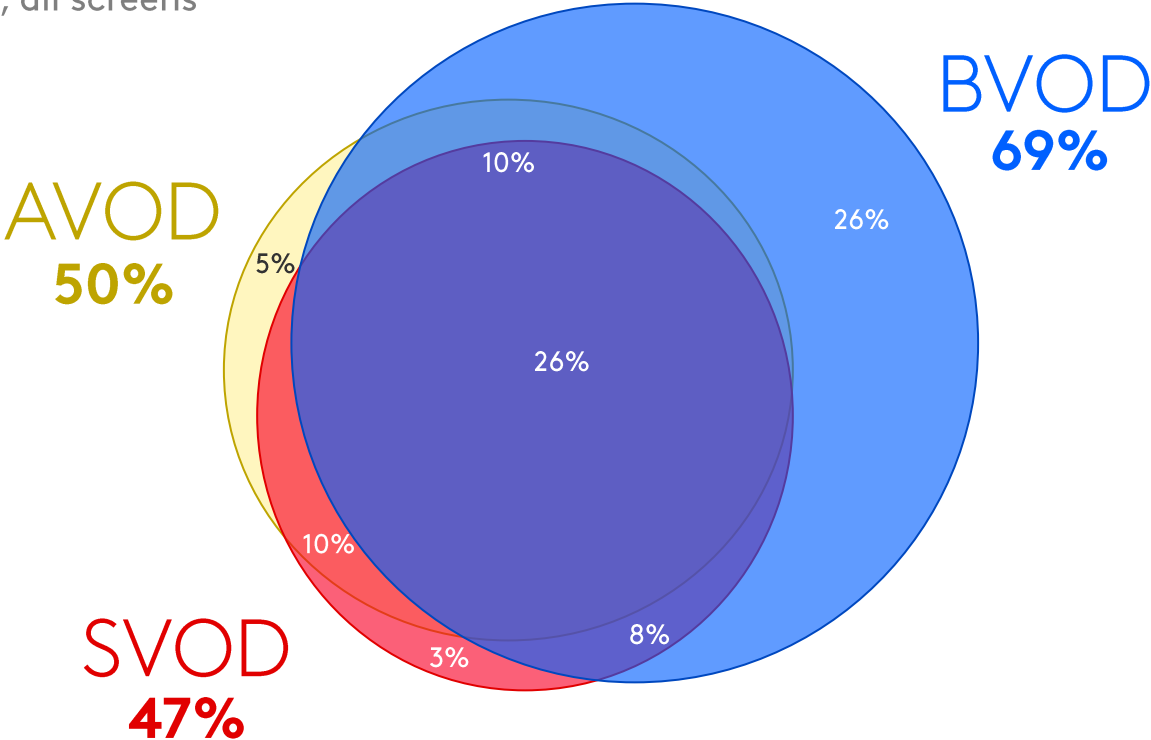
The future will end in tiers



“When you read speculation that we are moving into selling advertising be confident that this is false” Netflix shareholder letter 2019

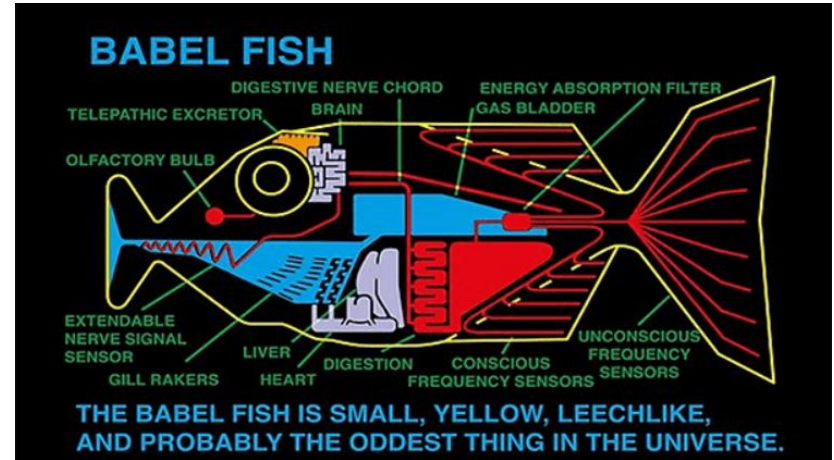
The market for streaming services is hugely competitive with high overlap in usage in Norway for example

Weekly reach 20-39, all screens



6.

From local to global: the internationalisation of culture





7.

Advertisers and agencies seek closer integration with content





The 2020s are shaping up to be the decade of the Smart TV set

The viewing experience will be enhanced, but in the context of understanding how television is actually watched.

Intellectual property is the new prime time, with significant steps towards vertical integration: from 'on set' to TV set

Local to global: streaming is facilitating the internationalisation of culture

The winners in the platform wars will be those that achieve the right blend between linear and VOD

..and the right blend of revenue models between subscription and ad-funded

Advertisers and agencies look to alternatives to video ad spots, increasing the need for integrated cross-platform measurement

Consent will be king when it comes to targeting

The battle to control the viewing gateway



Building the industry standard for a more frictionless world

- Metering technology investments and deployments.
- Ingesting CTV+ to add more precision and granularity

Evolving strategies for audience retention, growth & monetisation



Solutions to monetise a complete view of your audience

- Broadcaster readiness to monetise cross-platform
- Best-in-class planning and analysis tools to aid ad sales, planning and trading.

New growth opportunities for advertising



Ready to measure all forms of IP-delivered ads and content

- Watermarking detection at 3 sec+
- Leveraging HbbTV capabilities
- In-flight campaign optimisation and performance solutions

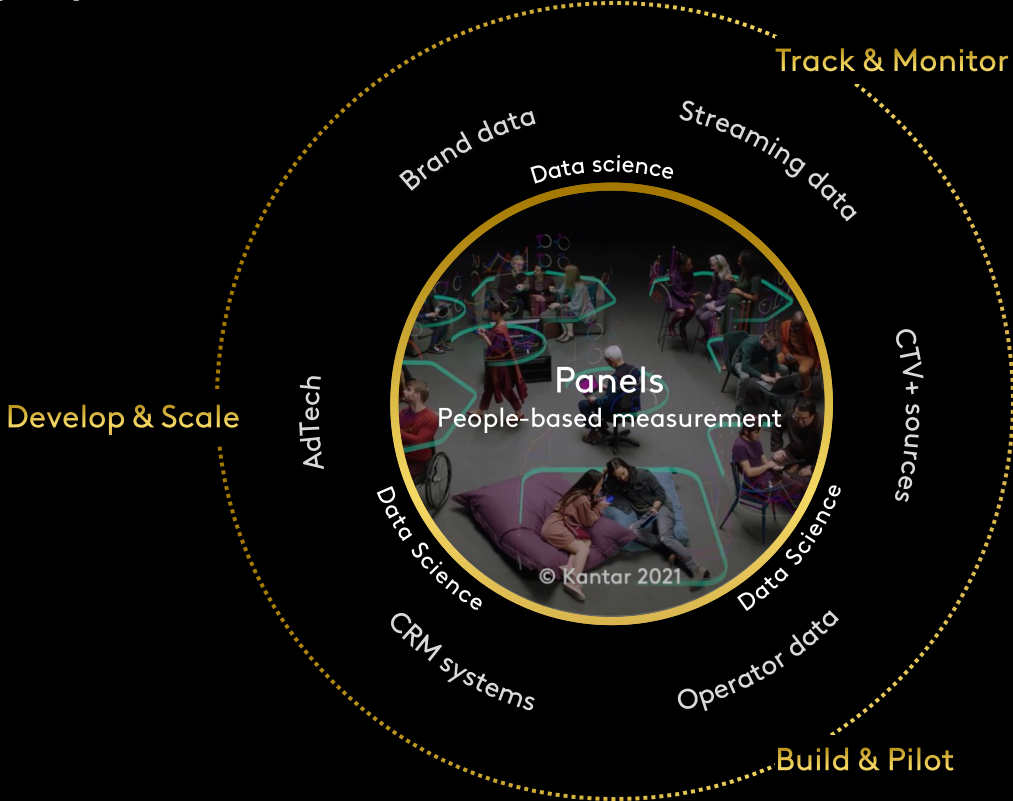
It's all about the data: the viewer value exchange



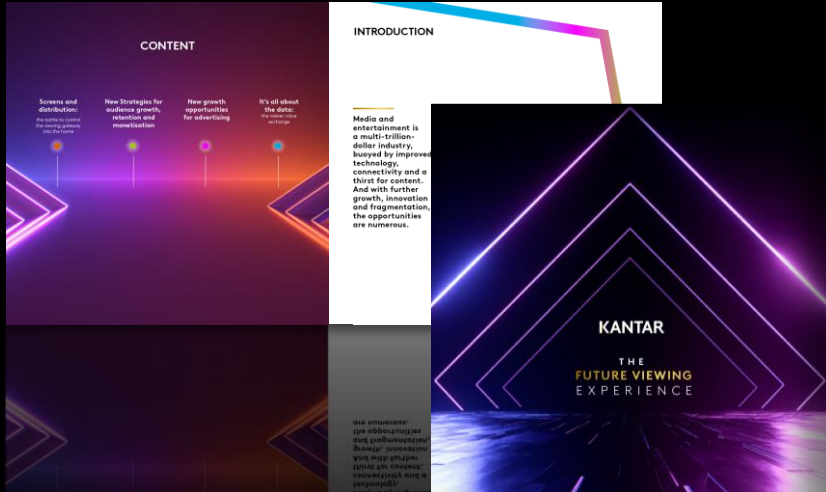
Responsible, secure first-party data integrations

- Secure, privacy compliant data exchanges.
- Investments in new panel health, engagement and compliance.

Unlocking value through open, future-ready solutions



Coming soon: 29 June 2022



Sao Paolo

Madrid

Online: 09:00 BST/10:00 CET/16:00 SGT

Online: 10:00 EST/15:00 BST/16:00 CET

Get involved

[#KantarFutureVX](https://twitter.com/KantarFutureVX)

A golden ratio diagram (Fibonacci spiral) is shown in the background, consisting of a series of overlapping squares and a spiral line, all in a light yellow color. The spiral starts from a small square in the lower-left quadrant and expands outwards, crossing the text.

Thank you!