



CONNECTION
THE WORLD
AUDIENCES
SUMMIT 2013

SETTING THE STAGE

Richard Asquith
Global CEO
Kantar Media Audiences

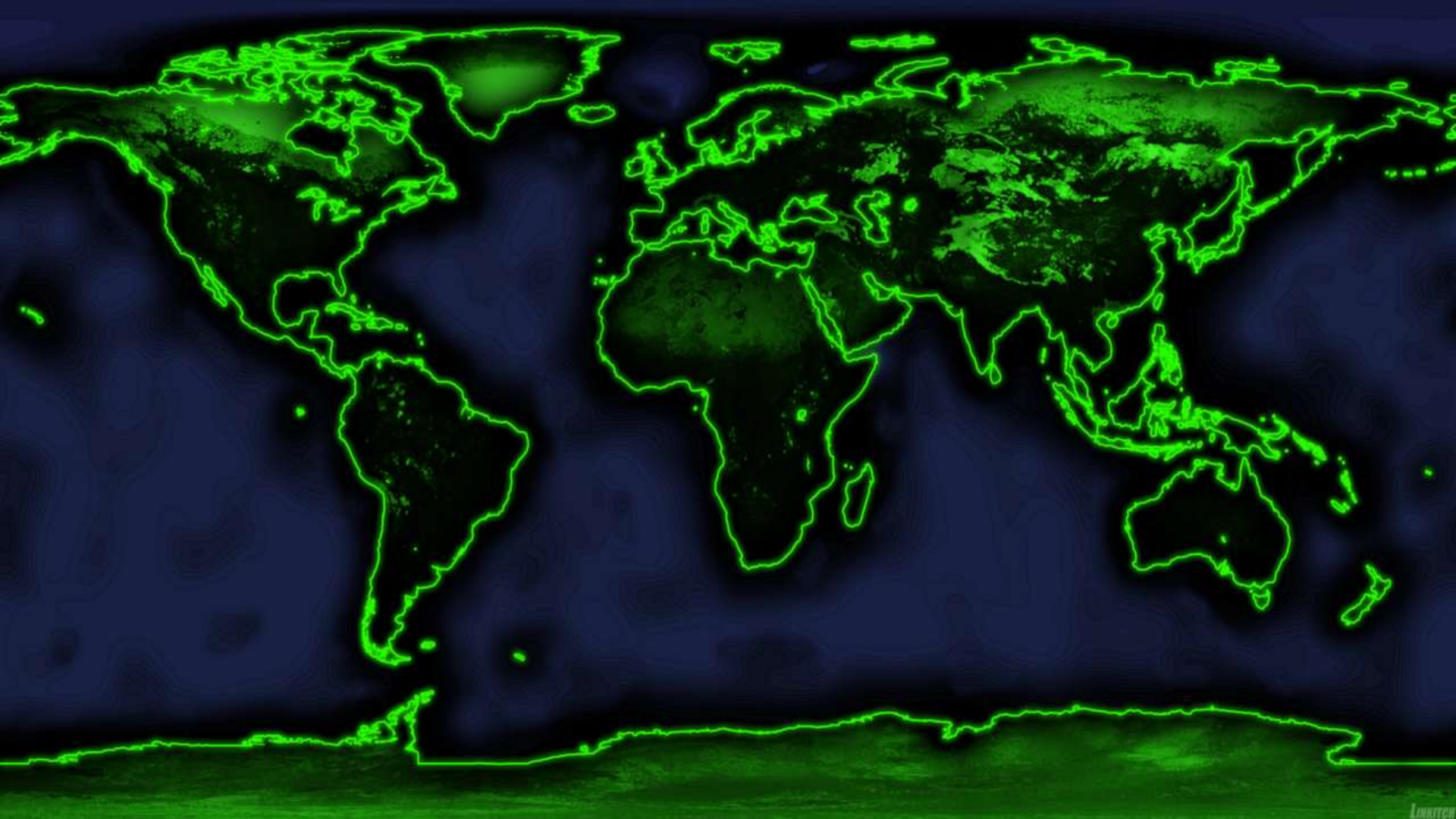
KANTAR MEDIA



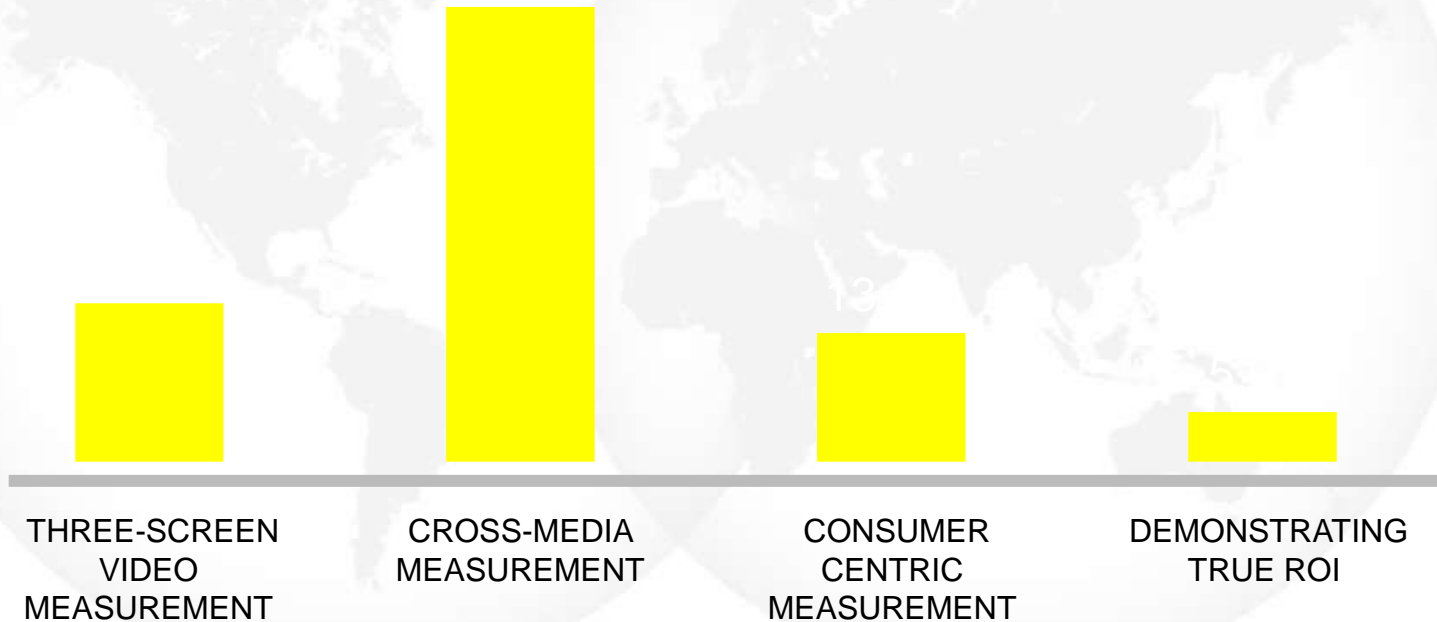
P&G

“ The Consumer
is Boss ”

P&G CEO, A.G. Lafley



THE BIGGEST PRIORITIES FROM HONG KONG



Currency
Media
Social
new
change
relationships
reliable
Complexity
penetration
TV
Multiscreen
data
platform
cross
Data
Adapting
Cooperation
inner
Fragmentation
occurrence
Independent
Connecting
Audience
redible
Cross
Screen
understanding
Multiplatform
Consumer
Mobile
Develop
valid
measuring
fusion
technologies
v world
need
date
Medium
New
complex
between
viewing
Change
Making
Defining
Time
evaluation
Harness
performance
Simple
Comprehensive
production
Reliable
Managing
complexity
Keep
platform
regulation
Build
Correlation
Government
Fragmentation
Keep

HOW



DO WE

NAVIGATE THROUGH



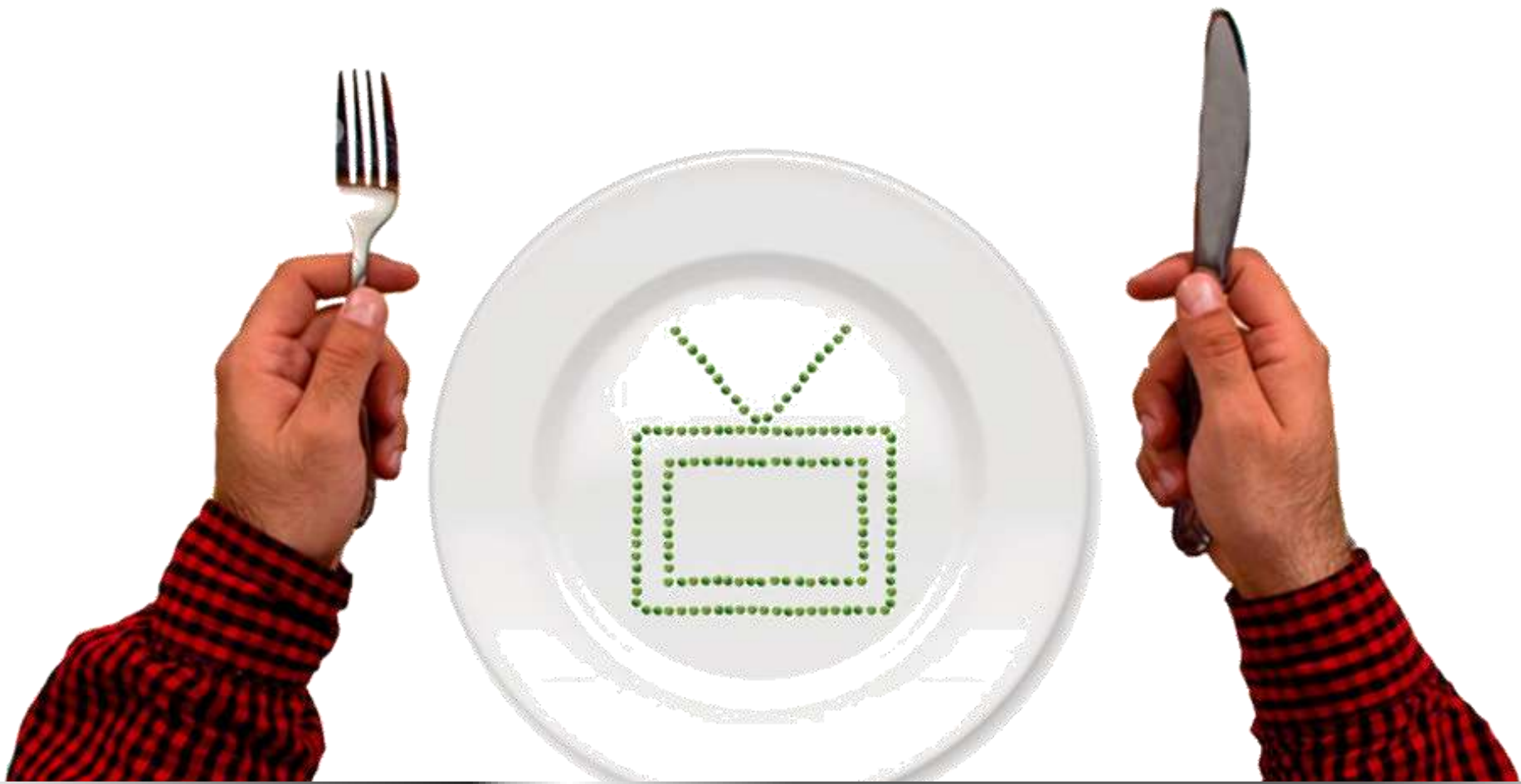
THIS AGE OF UNCERTAINTY?





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KANTAR **MEDIA**



THE TV-HUNGRY CONSUMER

GLOBAL TV REVENUES

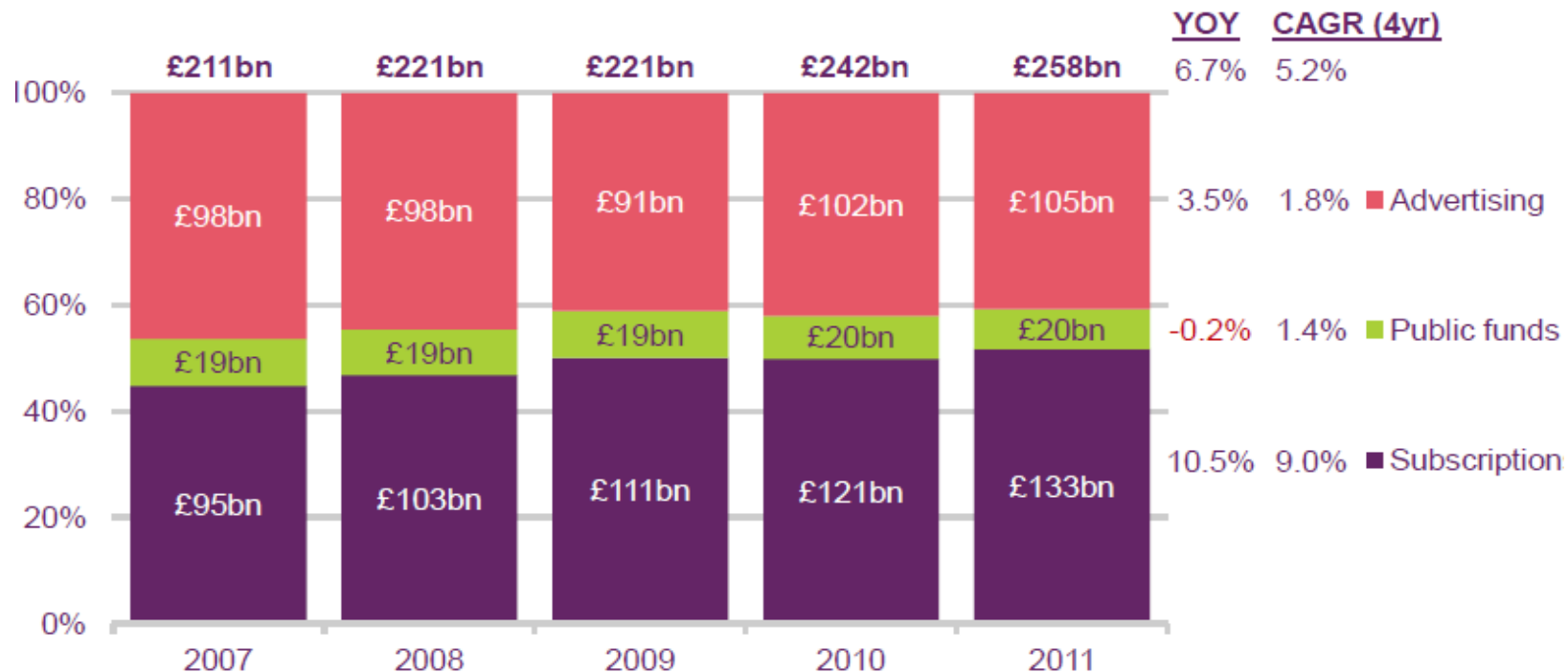
OFCOM International Communications Report 2012



OFCOM International Communications Report 2012

TV CONTINUES TO DOMINATE

TV INDUSTRY REVENUES BY SOURCE



TV IS STILL KING!

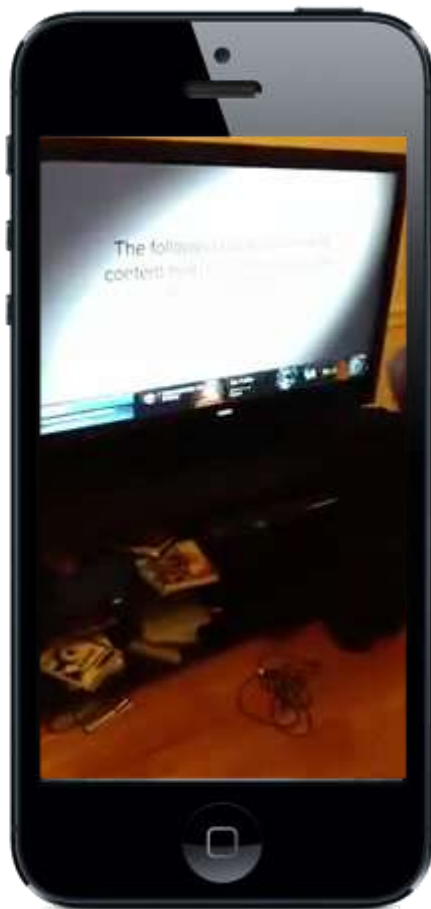
BUT WHAT DO WE MEAN BY TV?

“

The medium around which all others revolve because of TV's power to expose us to creative works, music, movies, books – and get us talking about them.

”







CHOICE

CONTENT

TIME-SHIFT

DISTRIBUTION



Netflix CEO Calls 'House of Cards' Down Payment on Original Content

12:00 PM PST | 8:00 AM ET | by Henry Radden

SHARE Comments



Reed Hastings sees the business as a longer-term opportunity and provides an update on the video streaming company's international strategy.

Netflix subscribers don't sign up for original content or specific shows but the overall experience, CEO Reed Hastings told a Morgan Stanley media and technology investor conference Monday.

"You want to think of House of Cards as a

Advertisement

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HSBC

IN THIS WEEK'S MAGAZINE



The Journey to Oz

ACADEMY AWARD: THE INSIDE

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HOW YOU'VE CHANGED, COMPARE



n=110

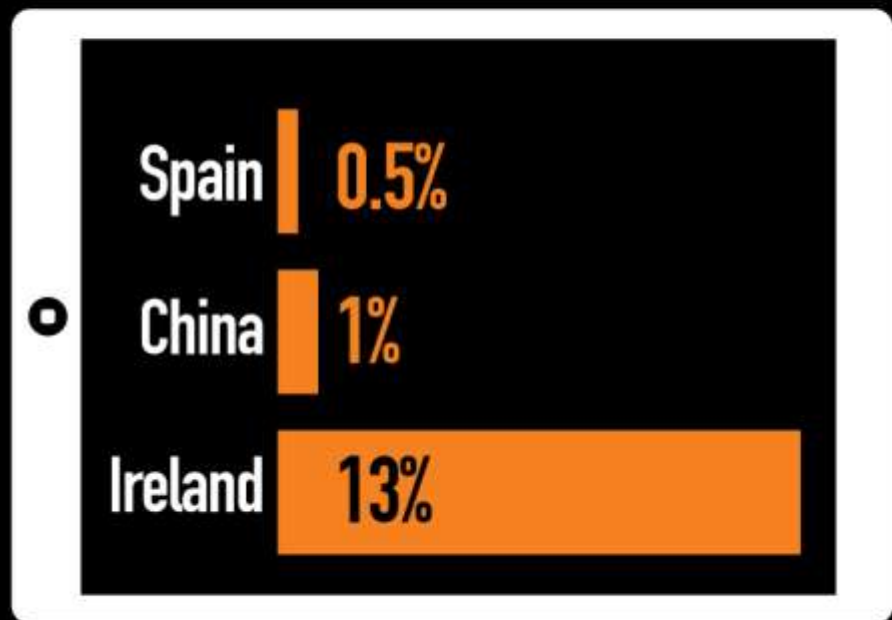
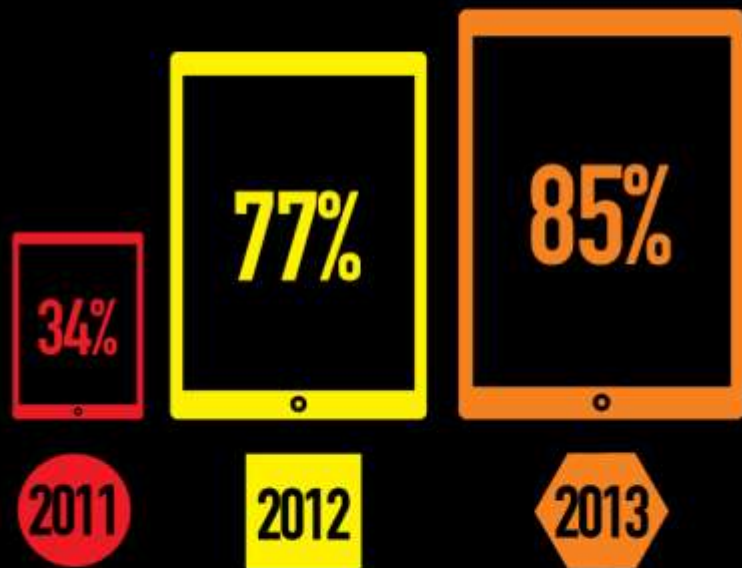


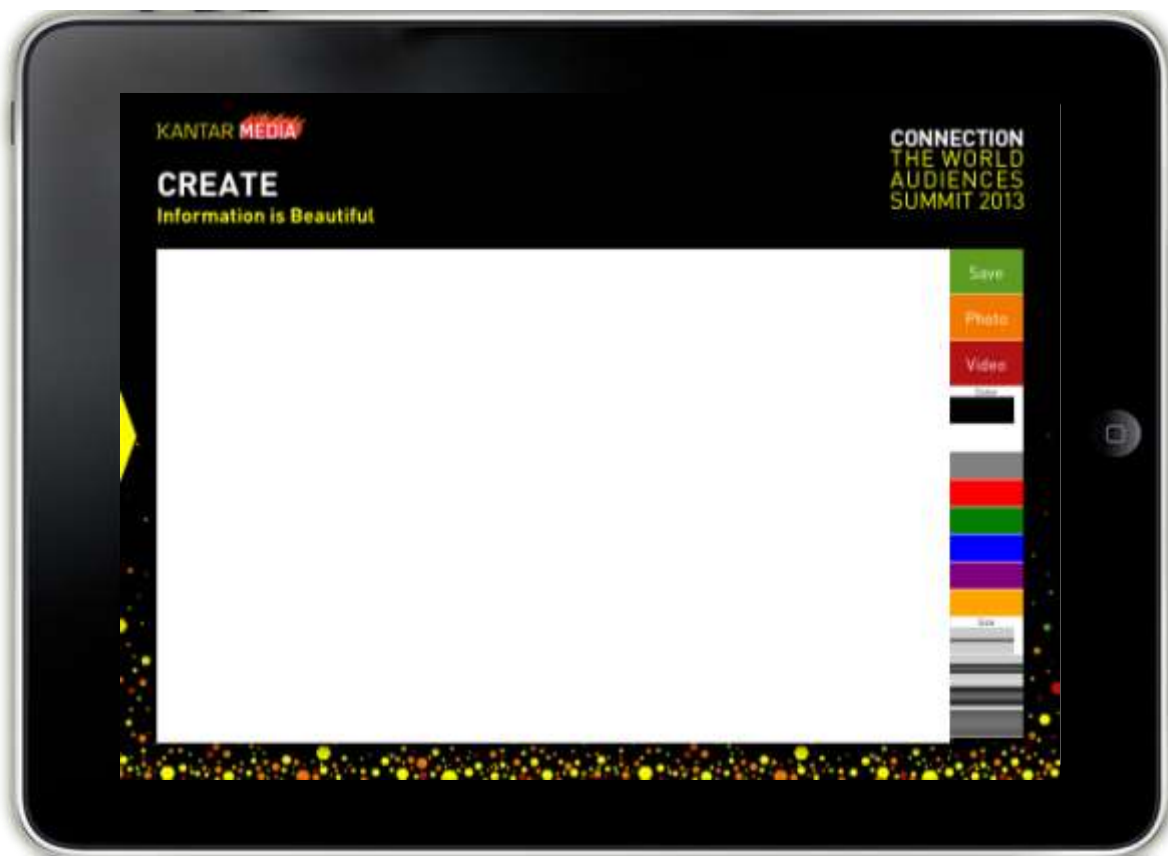
n=106



n=116

IPAD OWNERSHIP





FROM TAM TO VAM

TV AUDIENCE MEASUREMENT TO VIDEO AUDIENCE MEASUREMENT







vodafone ES 3G 11:51 77%

Regions

Th 13/12/2012; Ind. 4+; Spain Whole day; Universe(000): Cuota

TTV	1	2	5	Antena 3	Cuatro	6	laSexta	Caracol	3	3e
100.0	9.9	2.0	13.3	13.2	6.1	6.5	2.4	0.0	2.4	0.2
100.0	10.1	2.0	13.2	13.4	6.1	6.5	2.5	0.0	2.5	0.2
100.0	7.6	1.3	11.5	14.5	6.3	5.5	12.2	0.0		
100.0	6.5	1.5	10.0	11.3	5.1	6.5			15.2	1.2
100.0	10.3	2.6	17.5	9.3	6.8	8.4				



THE ENGAGED CONSUMER



WHICH OF THESE DO YOU USUALLY DO WHILE SURFING THE INTERNET?

KANTAR MEDIA



Listen to
non-internet radio

8%

2013



Listen to
internet radio

16%

2013



Watch
videos / DVDs

17%

2013



Chat on
mobile phone

21%

2013



Send text
messages

29%

2013



Listen to
music

30%

2013



Listen to / watch
television

38%

2013



LISTENING TO OR WATCHING TV WHILE SURFING THE INTERNET

KANTAR MEDIA

TGI

38%



16%

Ireland

26%

Germany

33%

UK

SOCIAL TV

MULTI-MEDIA TASKING IS GROWING



40% of all Twitter Traffic during peak time is about TV
Source: SecondSync

30 UK TV series accounting for **9%** of all UK TV viewing in the last year, drove **half** of all Twitter activity



@weloveaudiences
#audiencesummit13



THE RICH CONSUMER



“

The new oil ...of television

”

David Abraham,
CEO Channel 4

DATA

CENSUS
DATA



= NEW OPPORTUNITIES

CONSUMERS EXPERIENCES CREATE DATA



THE FUTURE WILL BE







TV HUNGRY



CONNECTED



ENGAGED



DATA RICH

KANTAR MEDIA



KANTAR MEDIA



CONNECTION
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