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KANTAR MEDIA

MULTI-SCREEN MEASUREMENT IN PRACTICE

USING SINGLE SOURCE TO GRAB PEOPLE'S REAL
BEHAVIOR

SBS  Discovery
MEDIA

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MULTISCREEN MEASUREMENT

WHY IT MATTERS

Introduction to a commercial TV-station: SBS Discovery Television

1. The Art of Making **Great Content**
2. The Business of **Delivering Audiences**

Trusting Market Research

3. An **Alliance** with Competitors
4. A Two Way Street
5. **Reliable & Representative** Research

Finding Feasible Solutions

6. **Testing** the VirtualMeter
7. Combining the **VirtualMeter** with the **TV-Meter** in one panel

GETTING THE CONTENT RIGHT

MAKING AND SHOWING GREAT CONTENT



CONNECTING WITH VIEWERS

Young adults 20-34



Adults 15-50 or 25-54



Family Viewing



Me Time Viewing



CREATING AN ALLIANCE FOR MEASURING TV



1988

1992

2000

2008

2013

2014

?

DR **TV2**

DR **TV2**

DR **TV2**



TV2

CN



DR

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Disney

VIACOM
INTERNATIONAL
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Having Competitors in the same room ensures due diligence regarding the quality of the measurement. Every TRP gets manicured or steamrolled!

A TWO-WAY STREET

1

Selling Audiences

- **TV** is an outstanding medium for **entertaining** and **engaging** people.
- **Providing content** that people want to see and are willing to spend time on habitually has made TV what it is today.

2

Buying Audiences

- **Media Agencies** and **Direct Clients** want their campaigns to have maximal impact – and TV is a crucial medium in achieving effectiveness.
- This means that **ratings**, and **daily** and **weekly reach** figures, frequency of viewing and time spent watching TV holds **commercial value** for **advertisers**.

3

Trustworthy Currency

- Sellers and Buyers of tv-audiences benefit from **one credible source**: One authoritative map telling us all **what the audience is watching**.
- **Credibility eases the sales process** and creates efficiencies

*Television Audience Measurement is the bond that binds us together.
It is the currency of the commercial market place.*

RELIABLE AND REPRESENTATIVE RESEARCH

Representative Panel



Valid measurement of people



Valid Channel Identification

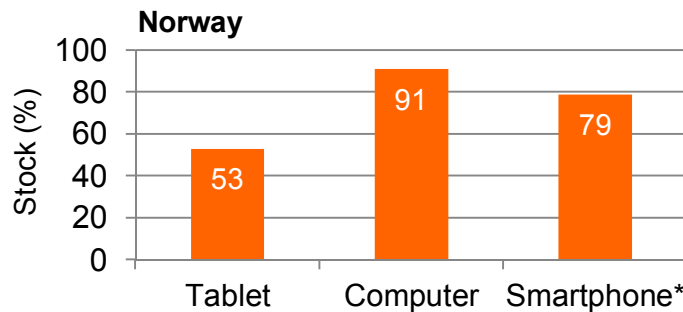
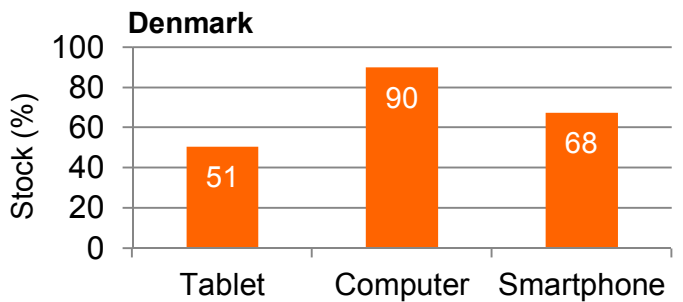


Reliable Ratings

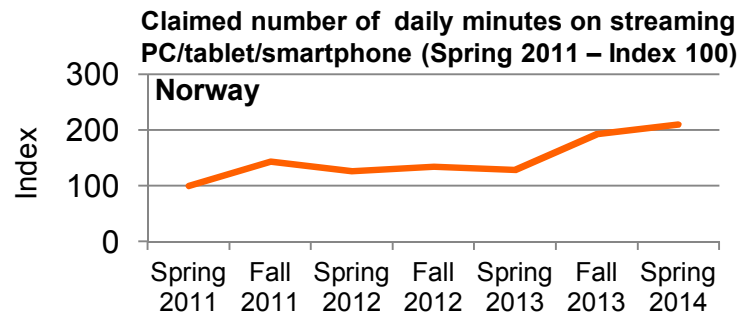
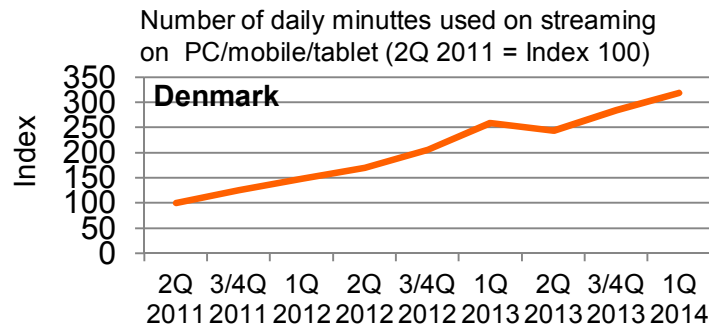


WHAT DOES "WATCHING TV" MEAN?

WHEN THIS QUESTION GETS ASKED—EVEN BY SERIOUS PEOPLE—IT CHALLENGES THE RELIABILITY OF OUR TAM MEASUREMENT



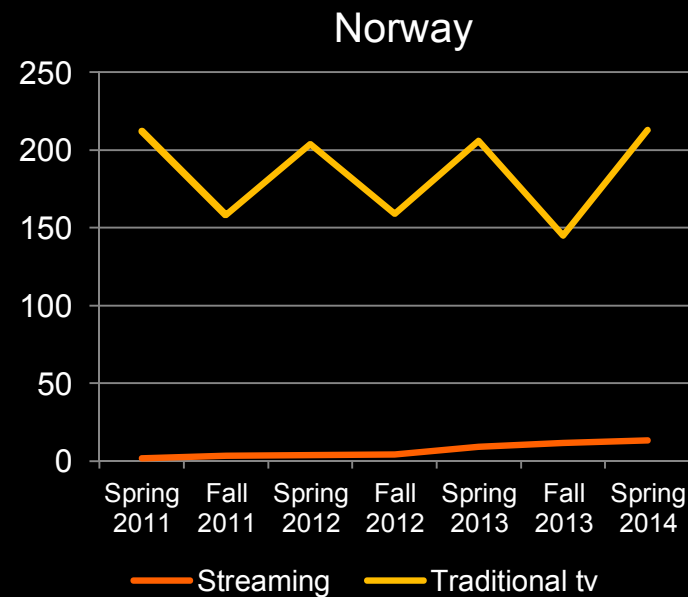
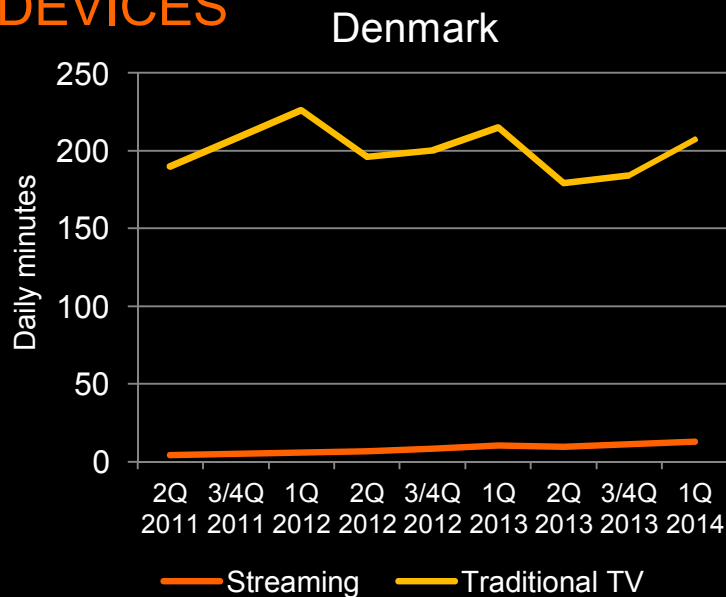
Source: Denmark: TNS Gallup Annual Survey Radio
 Source: Norway: TV-tracker Survey 2014, P12+; * TNS Interbus Survey Q4 2013, P15+



Claimed viewing on other devices is growing steadily

THE IMPACT ON TRADITIONAL LINEAR TV

THERE IS A SUGGESTED CORRELATION BETWEEN THE DECREASE IN TRADITIONAL TV-VIEWING AND THE GROWTH OF VIEWING ON OTHER DEVICES



Hypothesis:
The official TV-meter surveys in Nordics are missing viewing. The TV-stations and Kantar Media TNS Gallup set out to find a solution...

Source: Denmark: Traditional TV from TNS Gallup TV-Meter; Streaming from TNS Annual Survey
Source: Norway: Traditional TV from TV-Meter (Spring=Jan-Feb, Fall=Aug-Sept), Streaming from TNS TV-tracker Survey

BENCHMARKING SOLUTIONS

Looking for Clues



Suggested Solution



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WHY WE CHOSE VIRTUALMETER

Considering pros and cons

People Centric



Server Centric



VM measures the pieces of the missing TV-viewing—not everything else going happening on the internet. *Taking the first steps*

What Virtual is & What it is not

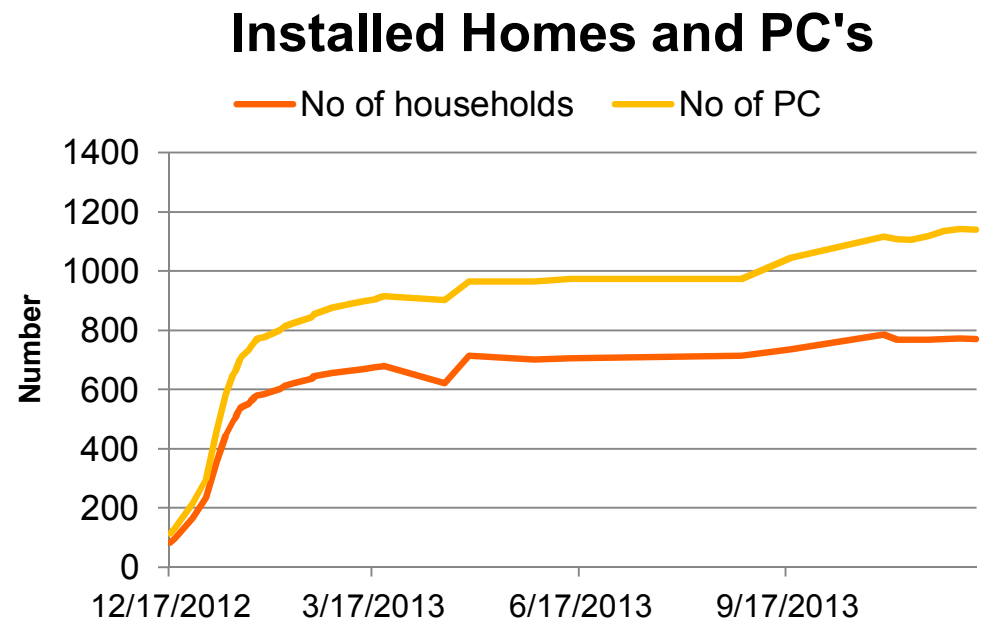
- > VM is identifying people in the same credible way as the TV-Meter survey in place by TNS Gallup
 - > VM measures TV content when viewed over the internet either as streamed live TV or on-demand
 - > VM measures TV content when viewed live as well as Time Shifted within 7 days –
 - > VM is measuring viewing on computers/laptops – and just recently Tablets.
-
- > VM is not full measurement of all web-activity
 - > VM is not a complete archive of all viewing 7+ days
 - > VM does not include TV viewing on Smartphones
 - > Smart Phone TV Viewing is being tested

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TESTS OF VALIDITY OF VIRTUALMETER

- > 11 months testing before release into the database
- > 764 Households installed on 1.086 PC/Mac
- > 29 Channels in the Audio matching reference system
- > More than 75% of existing households accepted the VM added task
- > No major compliance issues
- > Started the VM for Tablet roll out in panel Nov. 2013, now at 346 HH's/469 Tablets



VIEWER BEHAVIOR: SIMULTANEOUS MULTISCREEN USAGE

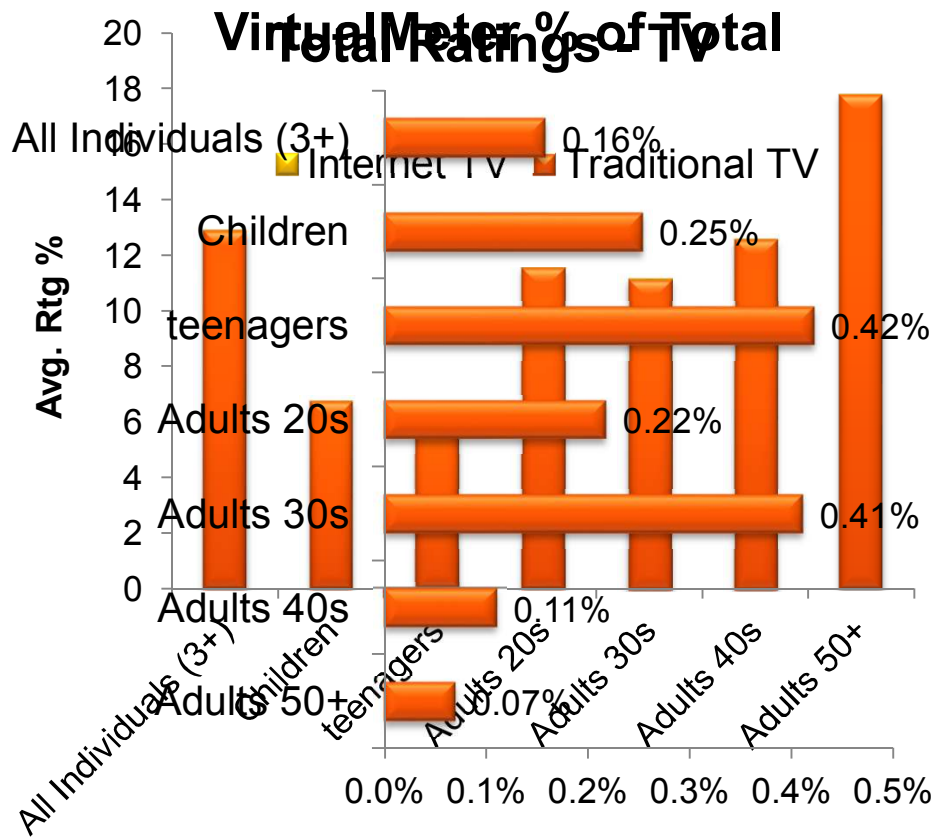
Special cases on usage that came forth during testing:

- > People watching TV on more than one device simultaneously
- > Occurs almost daily, but small in volume
- > Current edit rule is : Keep the VM viewing, drop the TV !
- > Going forward we need the reporting to allow for multi screen viewing



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VIRTUALMETER LEVELS



Source: TNS Gallup TV-Meter, December 1, 2013 – May 25, 2014

Baby Steps



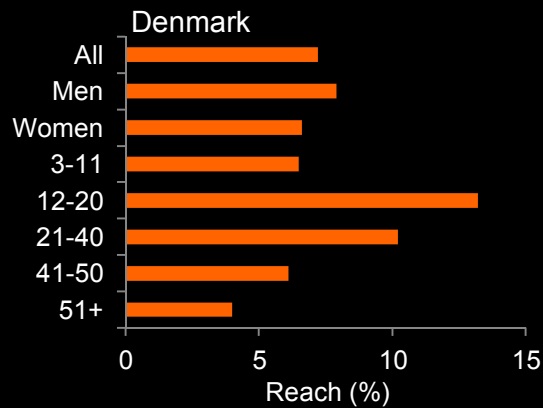
After a series of tests of validity, the VirtualMeter was implemented in the official TV-Meter currencies in Denmark and Norway in 3Q, 2013

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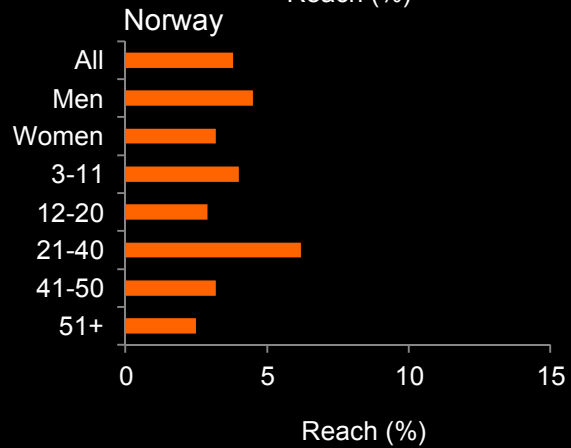
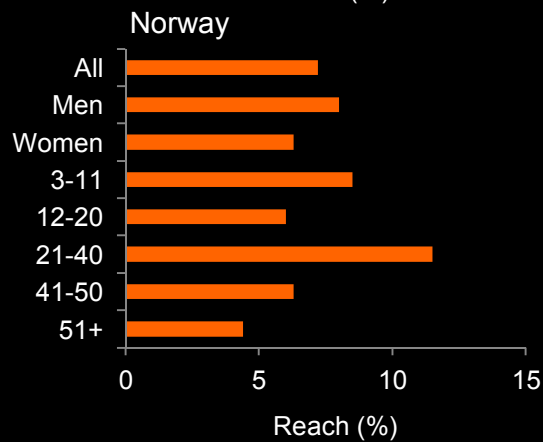
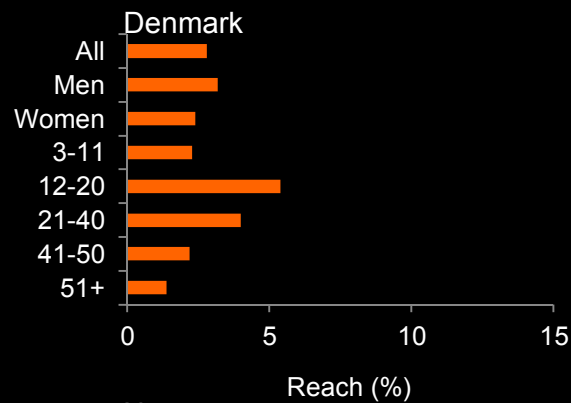
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VIRTUALMETER RESULTS

Monthly Reach in demos



Weekly Reach in demos



Source: Denmark: TNS Gallup TV-Meter, December 1, 2013 – May 25, 2014

Source: Norway: TV-Meter, December 1, 2013 – May 25, 2014

MARKET REACTIONS TO ADDING MORE DEVICES IN THE TV CURRENCY

Press Releases went out in both Norway and Denmark

- > Positive reactions from Media Agencies
- or a positive silence
- > Positive Reactions from BtB:
- Enhanced quality of the tv-meter survey
- > In House TV-Station reactions are mixed:
Digital departments and Programme departments had hoped for even higher numbers from the VirtualMeter
- > Still a learning process going on when it comes to the VirtualMeter, e.g. when comparing to server centric measurements



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