

## Big Screens & Big Data - is this the future?

From TV to TV .. continues

Jennie Beck  
John Gill

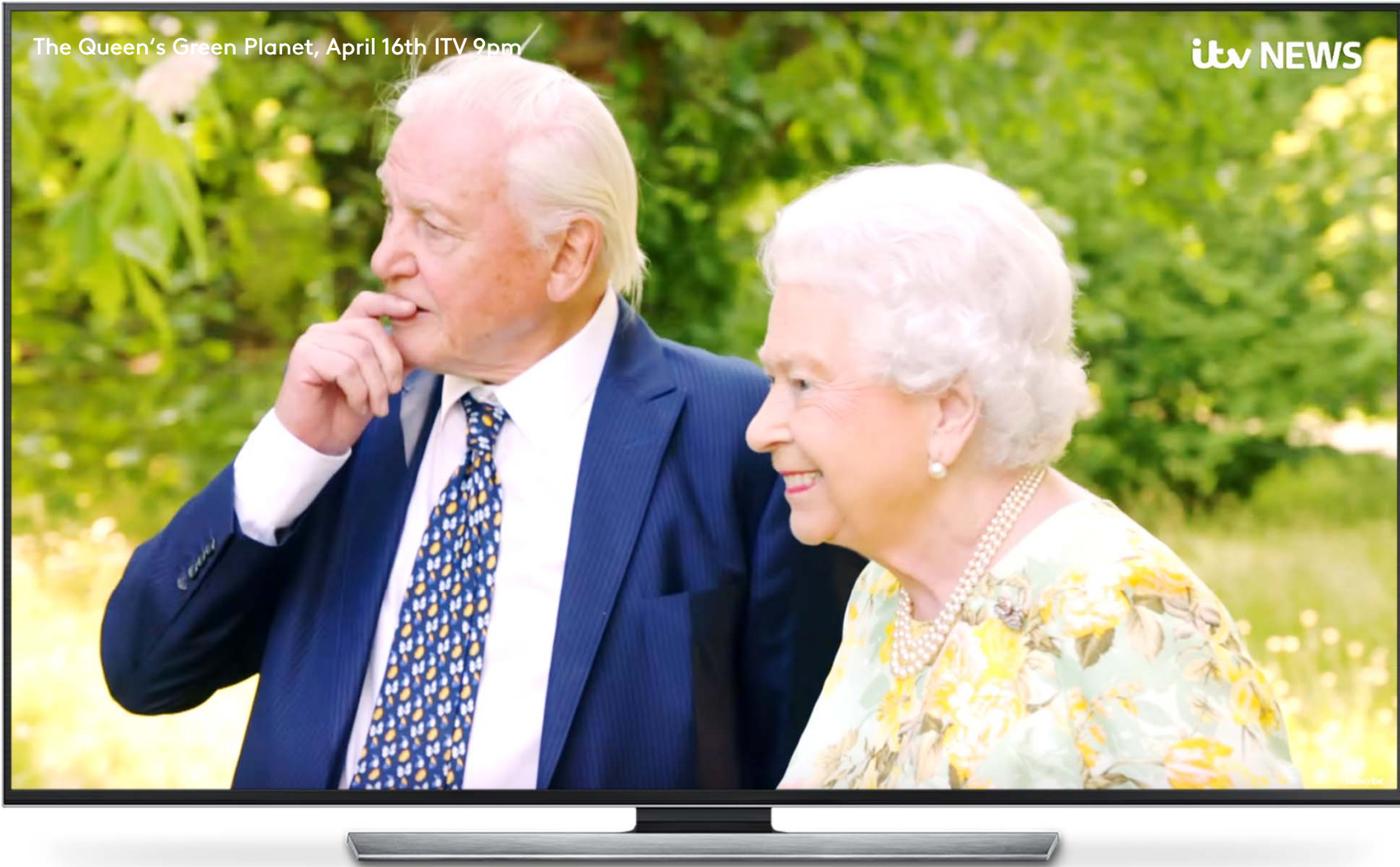
1978



2018

The Queen's Green Planet, April 16th ITV 9pm

itv NEWS



# Where we have been

RETURN  
PATH DATA

CORE PANEL

ONLINE CENSUS  
DATA

FIRST AND  
THIRD PARTY  
DEMOGRAPHICS

SET METER  
PANEL

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## A Next Generation PeopleMeter to fuel TV trading currencies into the next decade

Measure all forms of viewing including addressable advertising and VOD

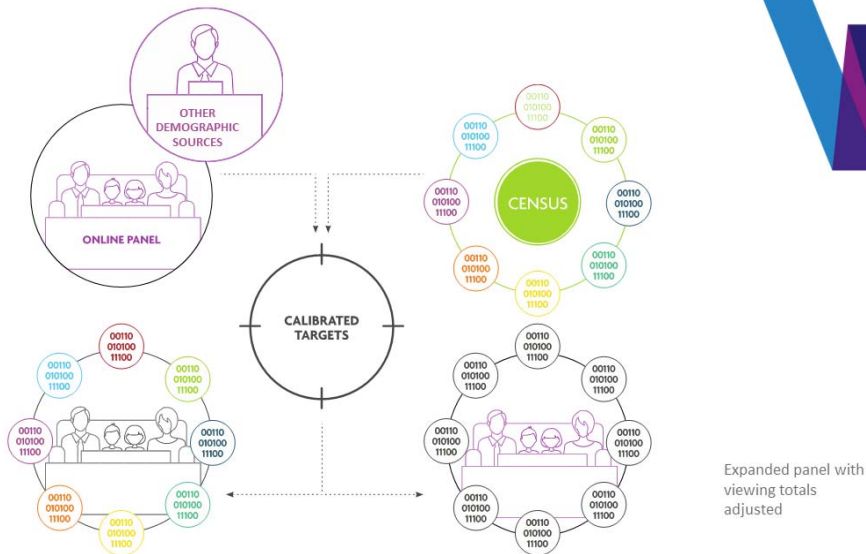
Overhaul the existing PeopleMeter technology look and feel - and enhance the existing functionality!  
Aesthetically pleasing Intuitive user interface.  
Cost efficient to buy and maintain



A look and feel worthy of any modern home - seamlessly integrate the meter into panelists homes  
Multiple touchpoints for panelist registration – maintains panel compliance  
Fit for the future: technology enabled for future developments

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## Model design



Expanded panel with viewing totals adjusted

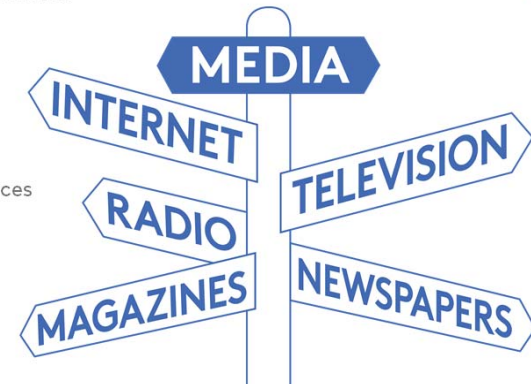
## The next step in evolution: Media Audience Measurement

Meet MAM: the Mother (of all) Audience Measurements

TAM → VAM → MAM

- JIC's join forces
- Media owners join forces
- Research agencies and data providers join forces

Next destination: Total Media?



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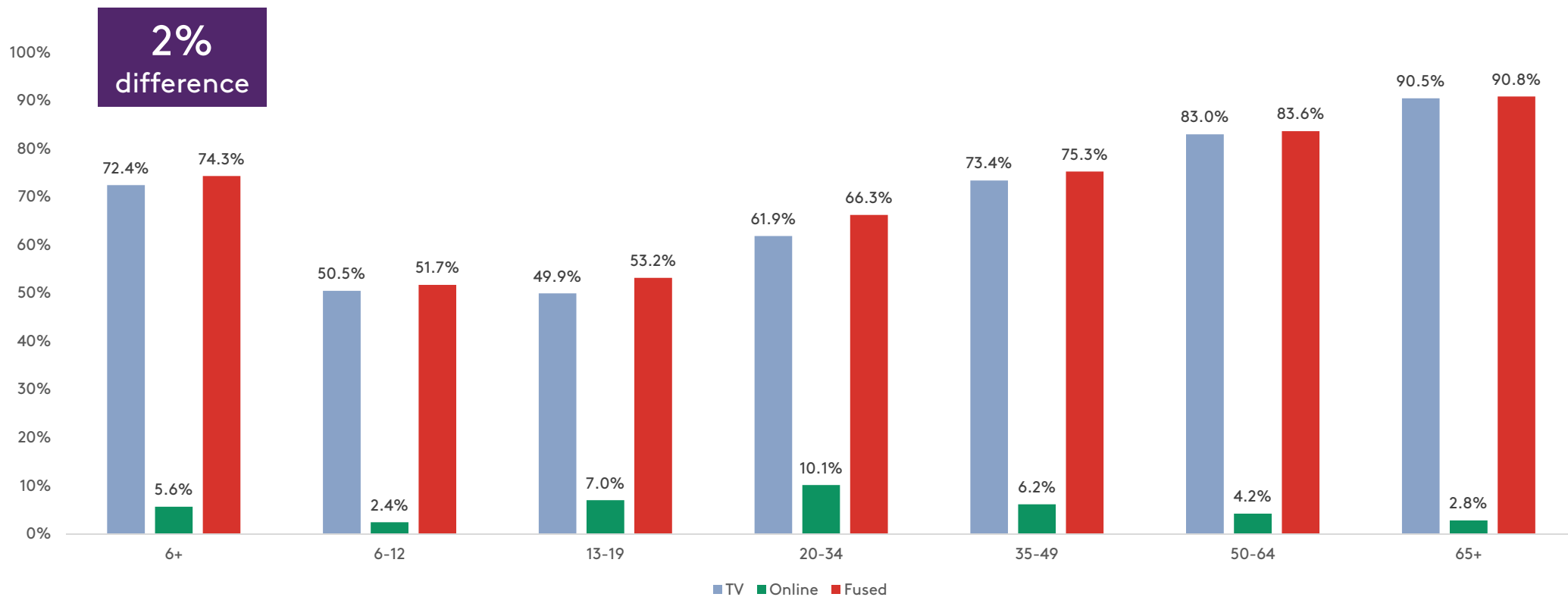


A black and white photograph of the Brandenburg Gate in Berlin, Germany. The gate is a neoclassical monument with six Doric columns and a quadriga sculpture on top. The sky is overcast. In the foreground, a white sign with a black border is positioned on the left side of the frame. The sign contains the text 'REALITY CHECK AHEAD' in a bold, serif font. The ground is paved with cobblestones, and a few people can be seen in the distance near the gate.

**REALITY  
CHECK  
AHEAD**

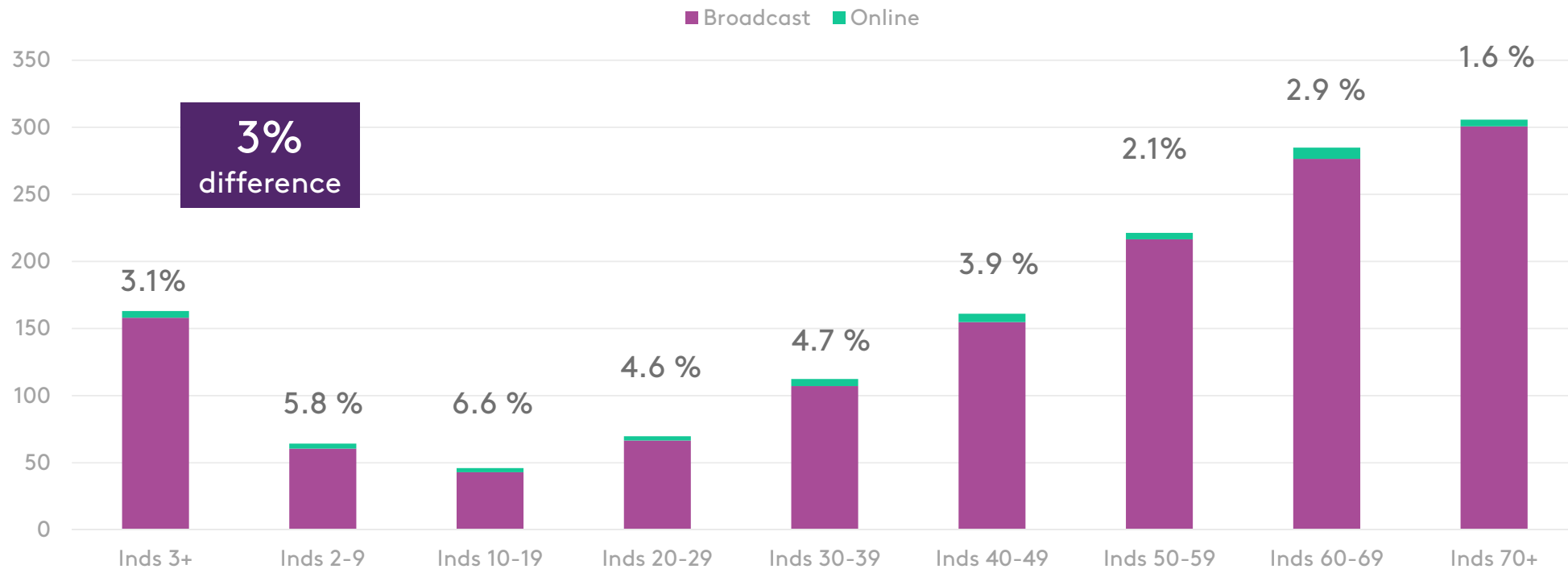
# Total TV is here

## Netherlands: Daily TV Reach



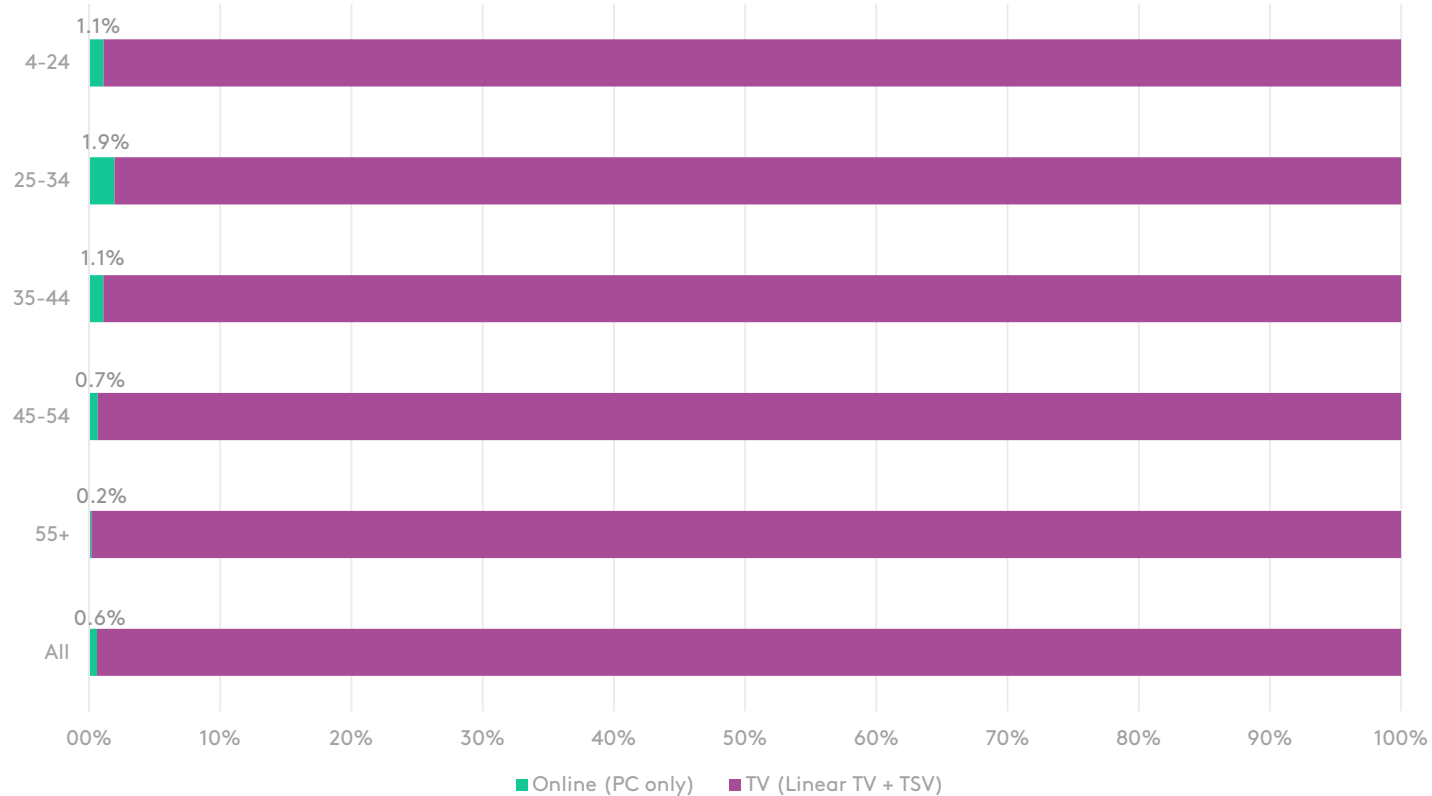
# Total TV is here

## Denmark: Online share of Total Video Minutes



# Total TV is here

Spain: Share of Online & TV viewing (%) in total viewing time

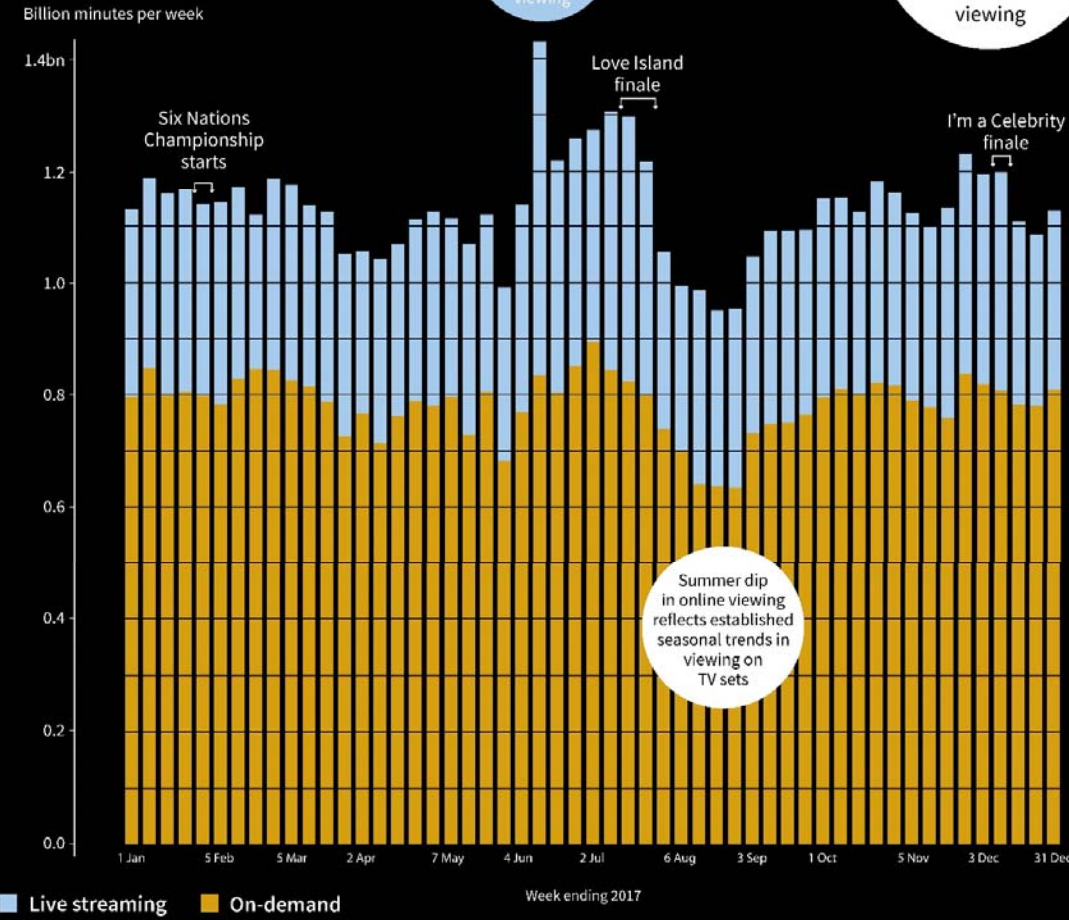


1%  
difference



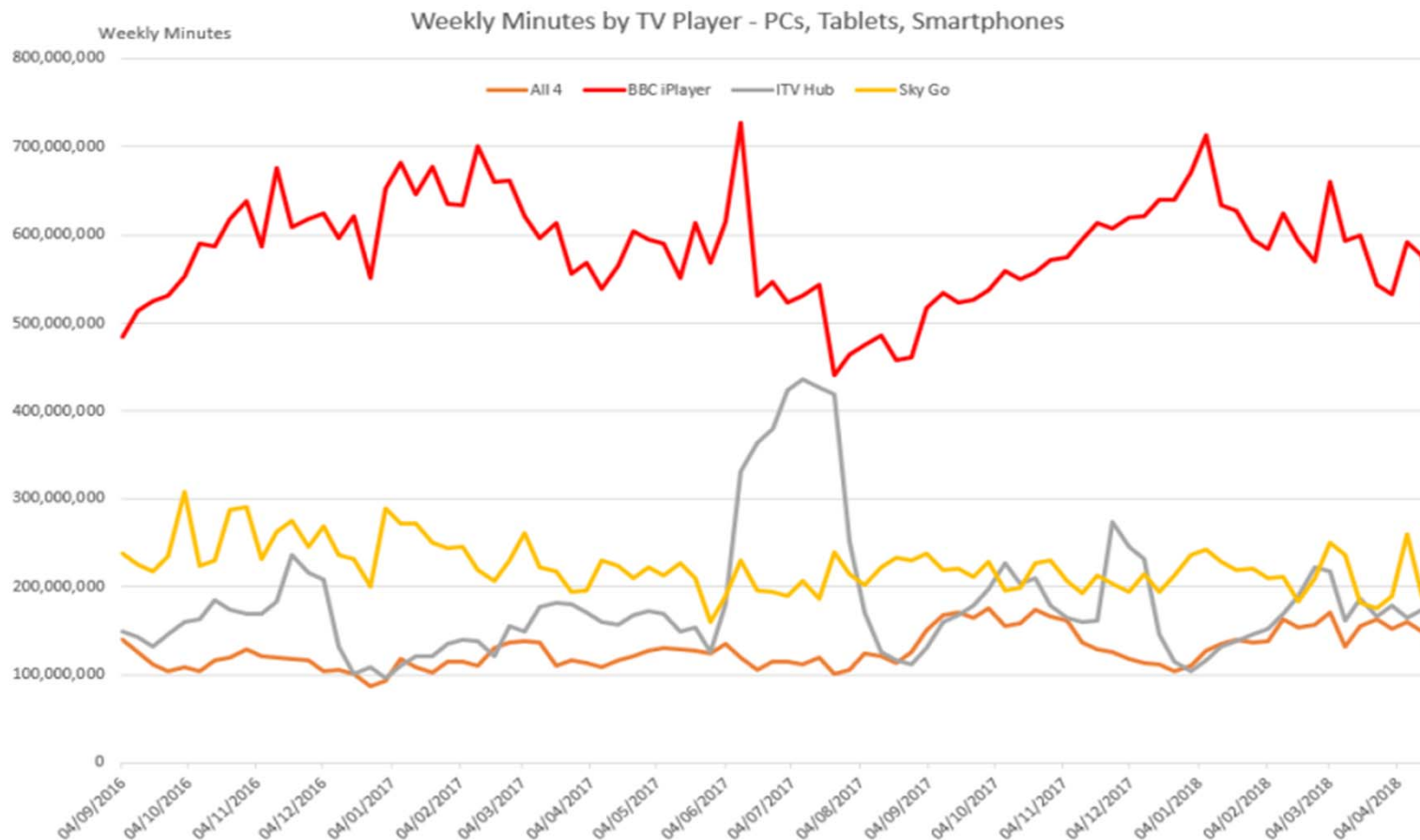
# Total TV is here

UK: Weekly minutes of viewing on tablets, PCs and smartphones 2017



# Total TV is here

## UK trends in TV viewing by device 2016-2018



# The big screen – where the action is

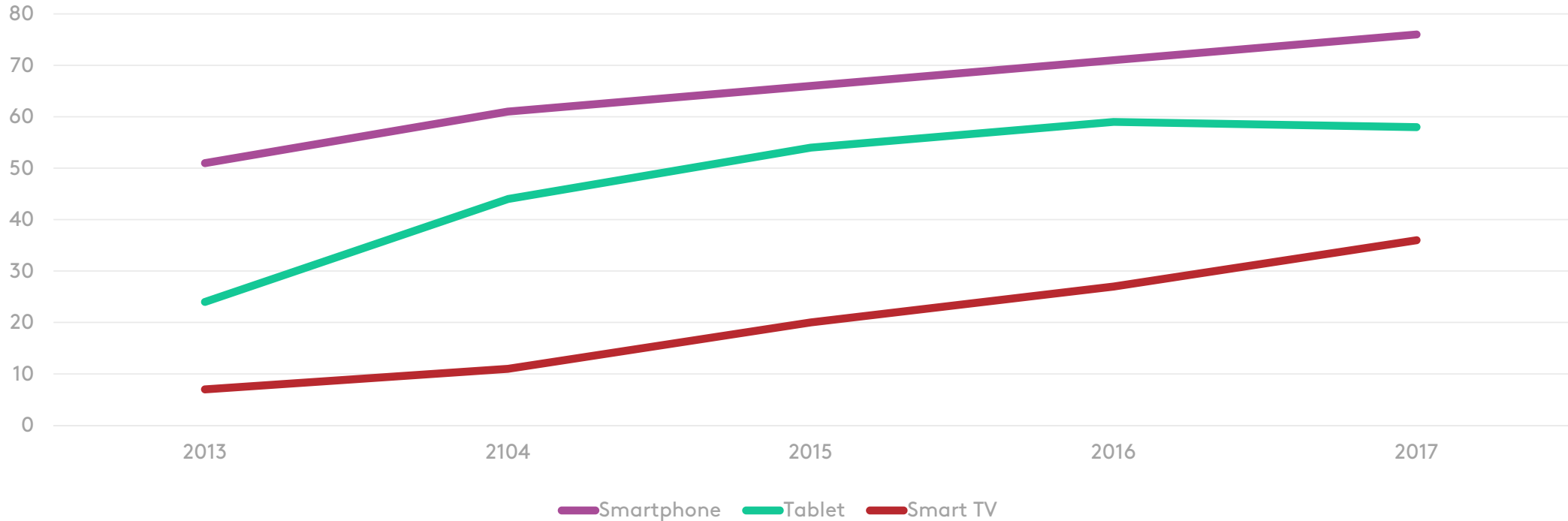


# Big screens getting bigger and better

Smart TV penetration has been slow – but steady

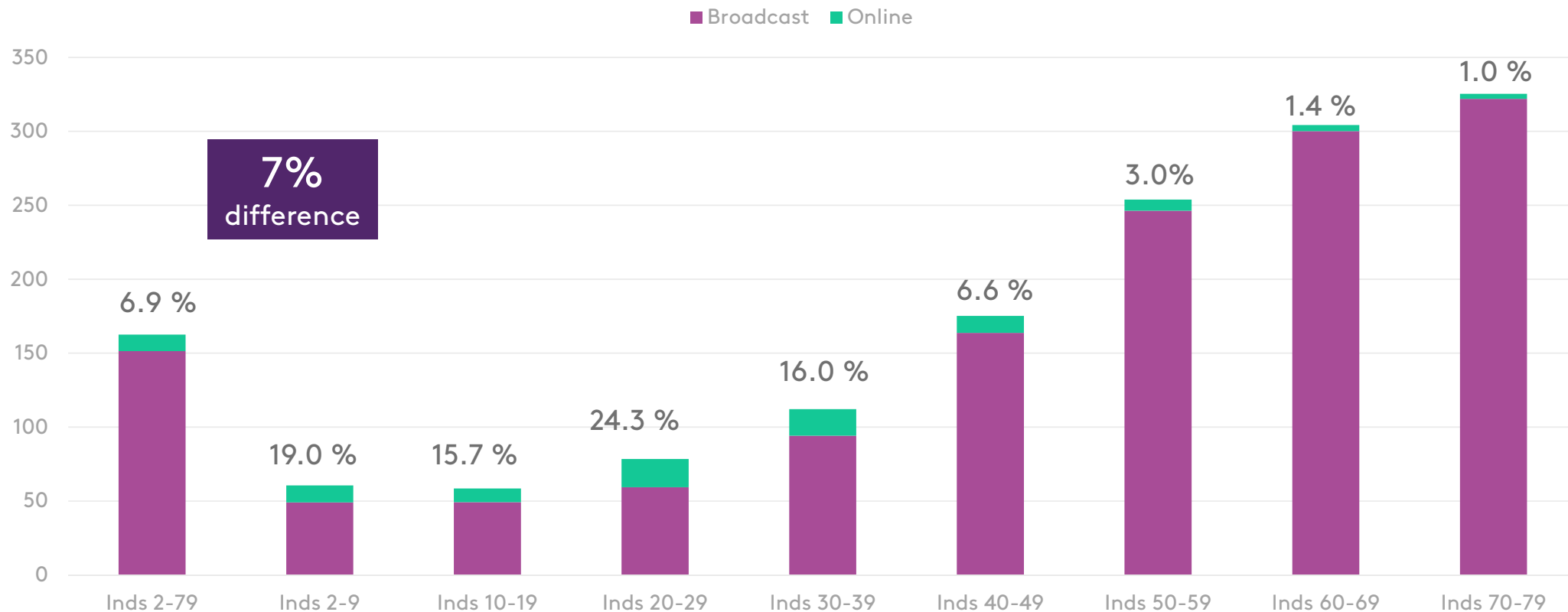


% Penetration of smart devices in the UK



# Total TV is here

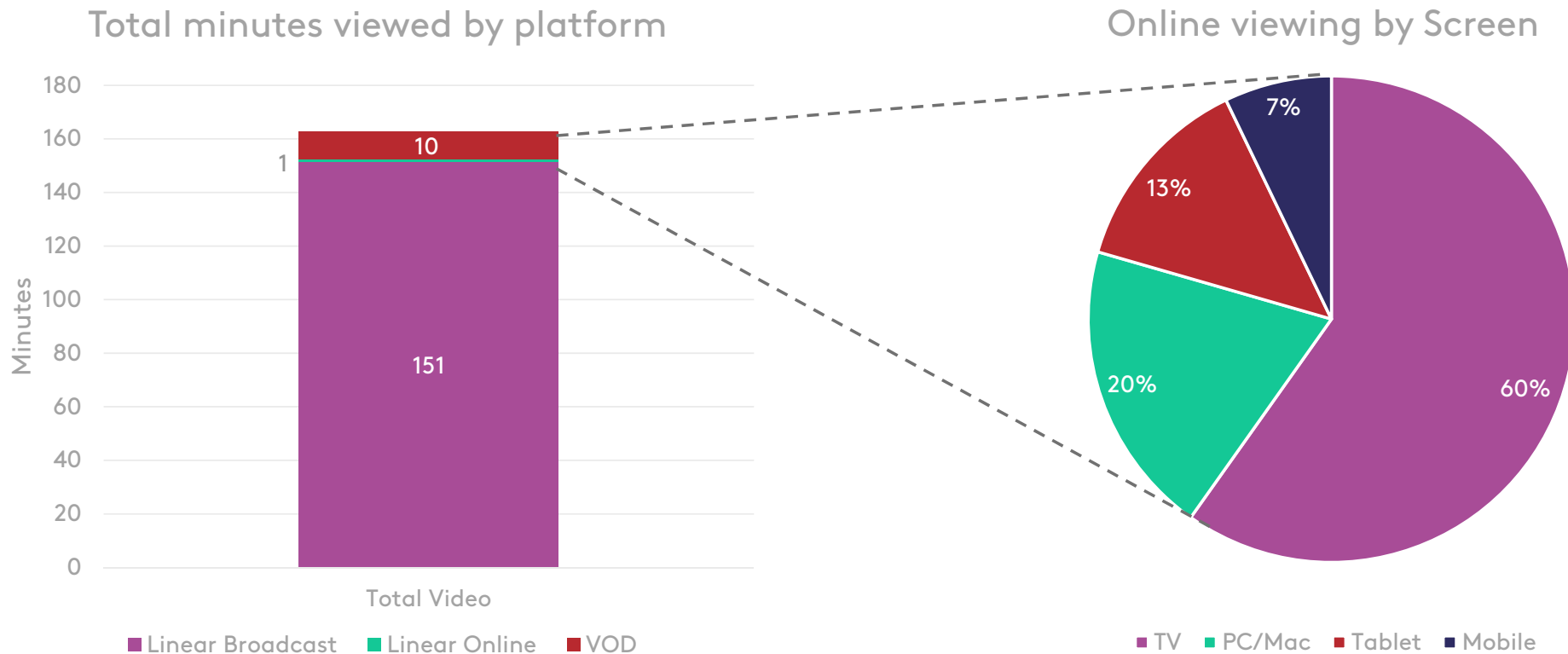
In Norway. Online share of Total Video





# Measuring Extended TV – adding online viewing

In Norway, IPTV viewing adds 11 minutes to total viewing – 60% on the big screen



## 2 things we're clearer about now



Viewing **IPTV-delivered content** is increasingly a **big screen** experience



We need to understand the **impact** of **non-broadcaster content**

The background is a solid dark blue color. It features several thick, overlapping, curved lines in various shades of blue, ranging from a very dark navy to a lighter sky blue. These lines sweep across the frame, creating a sense of motion and depth. One prominent line curves from the top right towards the bottom center, while another sweeps from the top left towards the bottom right. A third, darker line curves from the middle left towards the bottom right.

**IP-delivered content**  
A big screen experience



## FocalMeter: measurement of IP delivered video

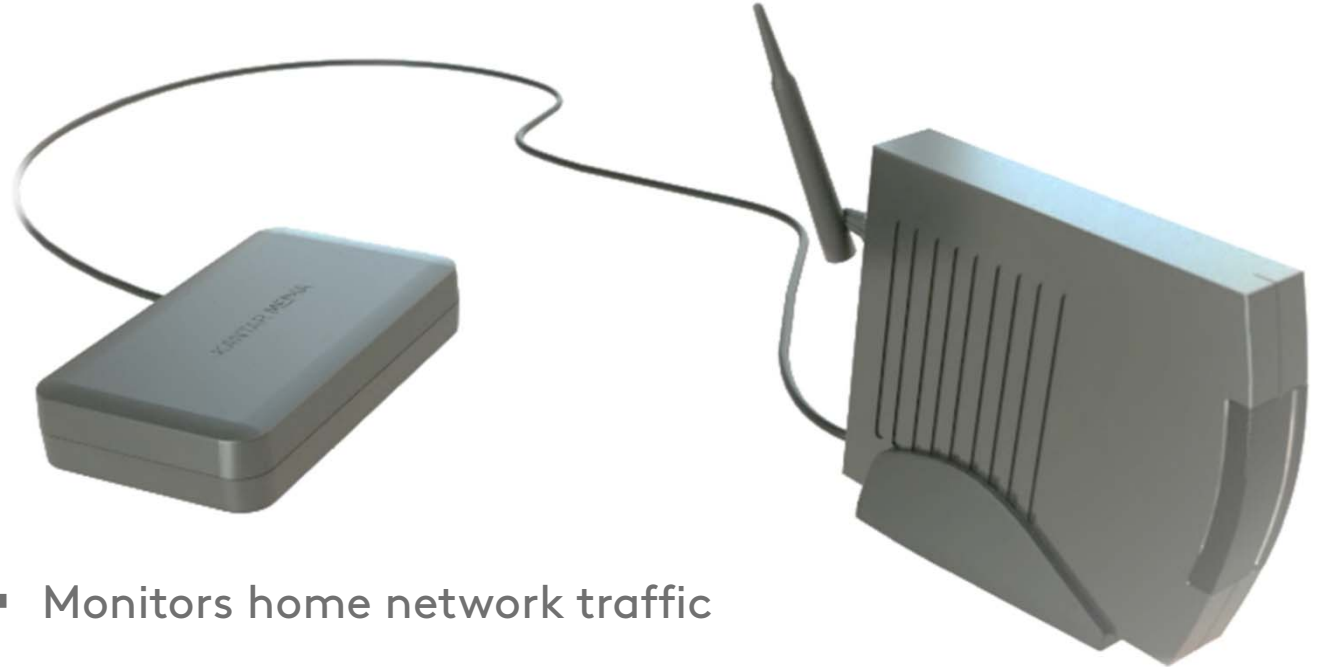
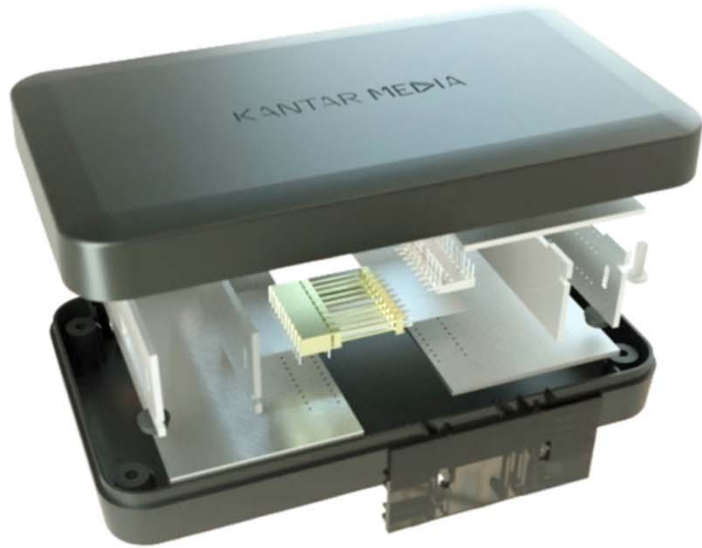
A panel-based solution measuring internet delivered TV consumption

- Measuring all internet-delivered TV across all devices in the home
- Real-time data capture
- Already in use in several countries



# A simple and elegant solution to measure online viewing

## Kantar Media's Focal Meter



- Monitors home network traffic
- Identifies which device is being used
- Detects video viewing via Kantar and comScore video tags
- Can give topline (volume) usage for non-tagged content

# Audience Fragmentation and Hybrid Measurement

## Audience fragmentation

- IP delivered TV is predominantly VOD
- Further fragmentation of the TV audience

➔ Solution: hybrid measurement

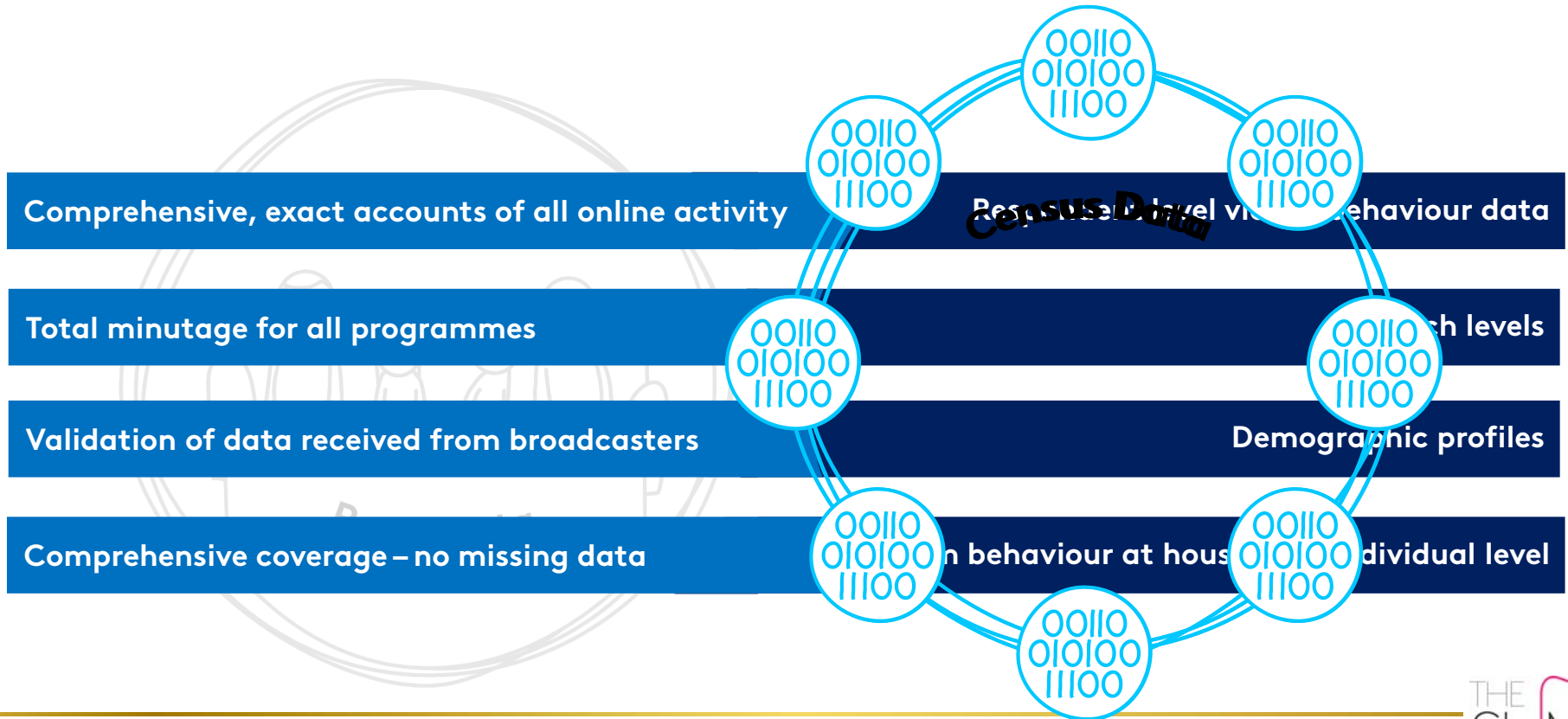
## Research tags

- Kantar or comScore research tags installed in video players produces data which
  - Is available despite encryption
  - Is of a specified and verifiable standard
  - Is the same for both panel and census measurement



# Data Integration

## Panel and Census Data Working Together



## Maximising Acceptability

### Kantar Media's Focal Meter

- No need to enter or change password or SSID in router, FocalMeter, or panel member devices
- FM automatically discovers all on-line devices in the home, even if the panel member doesn't remember to report them
- No software needs to be installed on devices – a big advantage for work laptops and reluctant household members
- Whitelisting concept offers panel member privacy reassurance

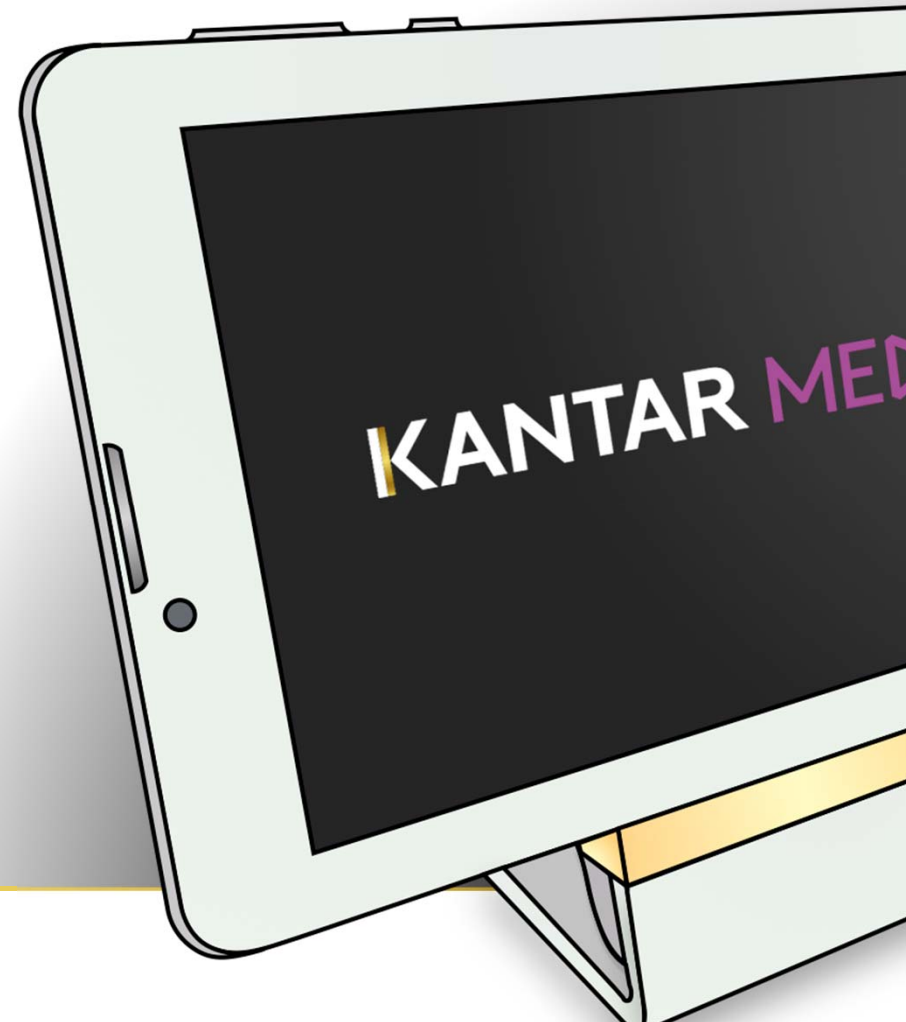


# Next Generation PeopleMeter

Fully-featured PeopleMeter

Real-time data collection – real-time ratings opportunity

Acoustic Path detection – latest audio matching and watermarking



# Next Generation PeopleMeter

Fully-featured PeopleMeter

Real-time data collection – real-time ratings opportunity

Acoustic Path detection – latest audio matching and watermarking

Bluetooth based source detection – easy install

- Wire-free
- Clean, tidy installation
- Fewer maintenance visits



# Next Generation PeopleMeter

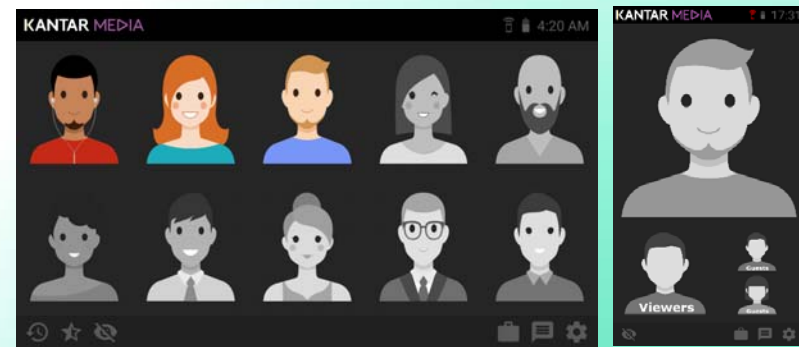
Fully-featured PeopleMeter

Real-time data collection – real-time ratings opportunity

Acoustic Path detection – latest audio matching and watermarking

Bluetooth based source detection – easy install

New user interface – registration via handset or app







**Understanding the impact of non-broadcaster content**

# Measuring non-broadcaster content

hulu



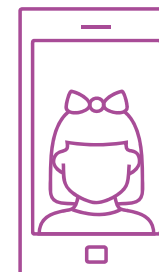
NETFLIX



You Tube



Google

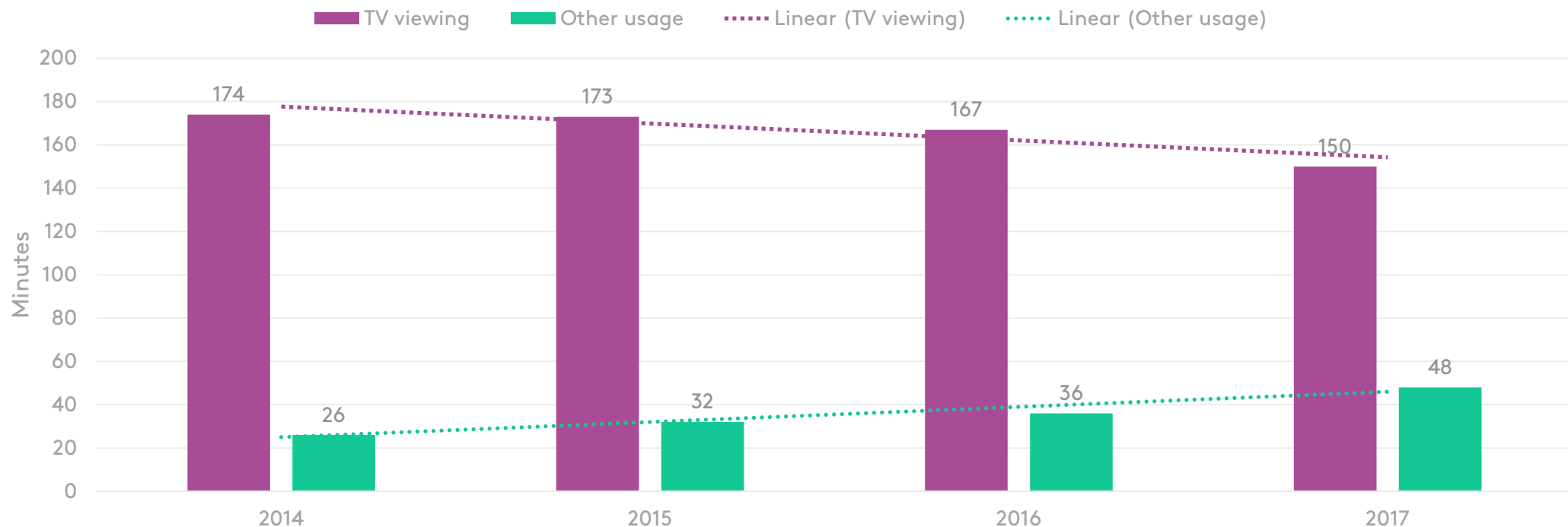


amazon Prime

# Declining time on TV, increasing 'unmatched' data



## TV viewing (and unmatched viewing) trends in Norway



# What is unmatched?

Accessed on the set or pushed to the set

## Matched

Any content which we have an audio reference or a watermark

- Broadcast live and watched live or on the same day as live
- Content time shifted within an agreed period (7 or 28 days)
- Any older content where the broadcaster has agreed for the reference to be held indefinitely

Declining

## Unmatched

Any content or activity for which we do not have a reference or watermark

- Broadcast content with no reference (older than the agreed period)
- OTT services (e.g. Netflix)
- DVDs etc.
- Short-form (e.g. YouTube)
- Radio/Games Consoles/Other activity

Growing

# Reducing the unmatched

Current situation

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Technical obstacles

Legal/Ethical obstacles



Measuring broadcaster content without a reference

None

None

Measuring use of non-broadcaster platforms

None

None

Measuring specific content on a non-broadcaster platform

None

1. Streams are encrypted and we will not break the code
2. Many supplier/platform agreements forbid the provision of audio references (because they don't want measurement). We cannot encourage suppliers to break their own agreements

# Measuring SVOD



Device requesting the service  
Service received (eg Netflix)



All devices



People viewing the TV set  
Device (eg set top box)  
Audio matching or watermarking

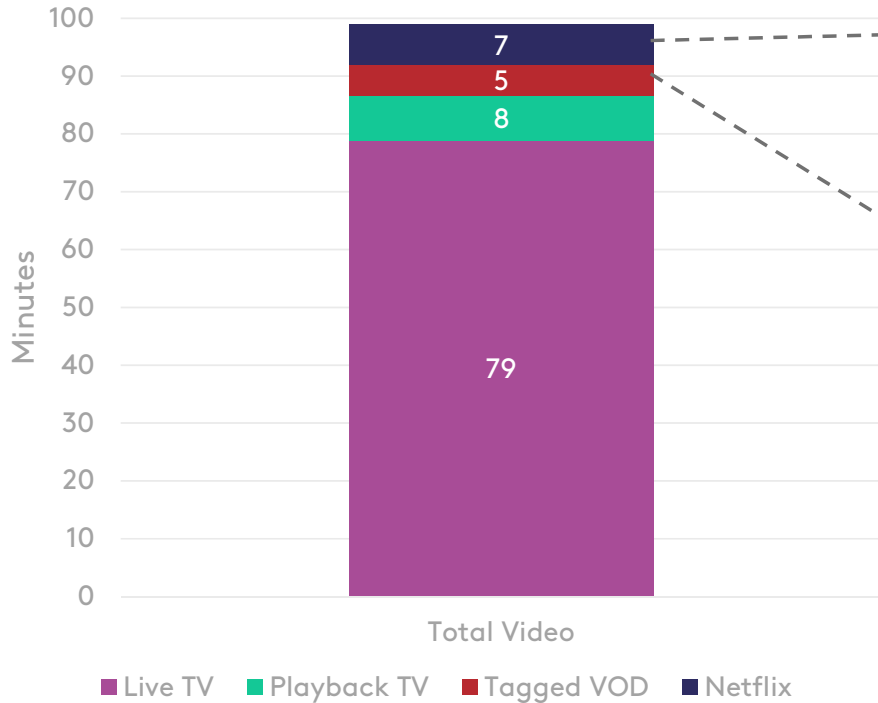


TV

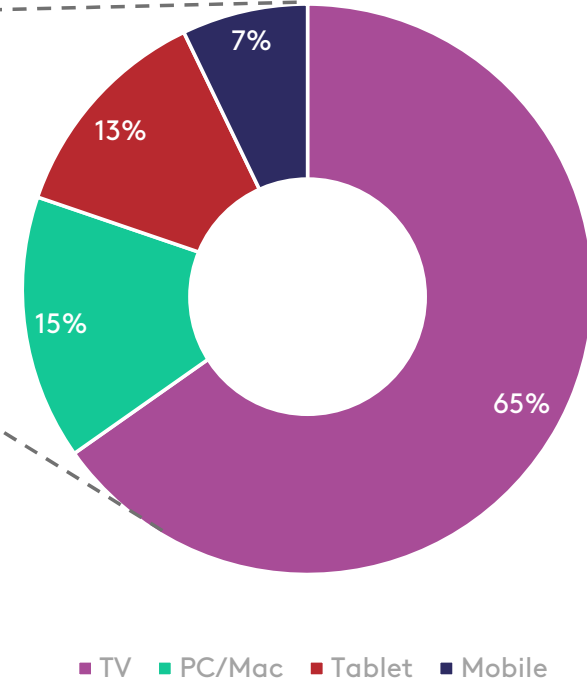
# Adding Netflix viewing from FocalMeter

+ 7 minutes to total viewing – 65 % on the big screen

### Total minutes viewed by platform

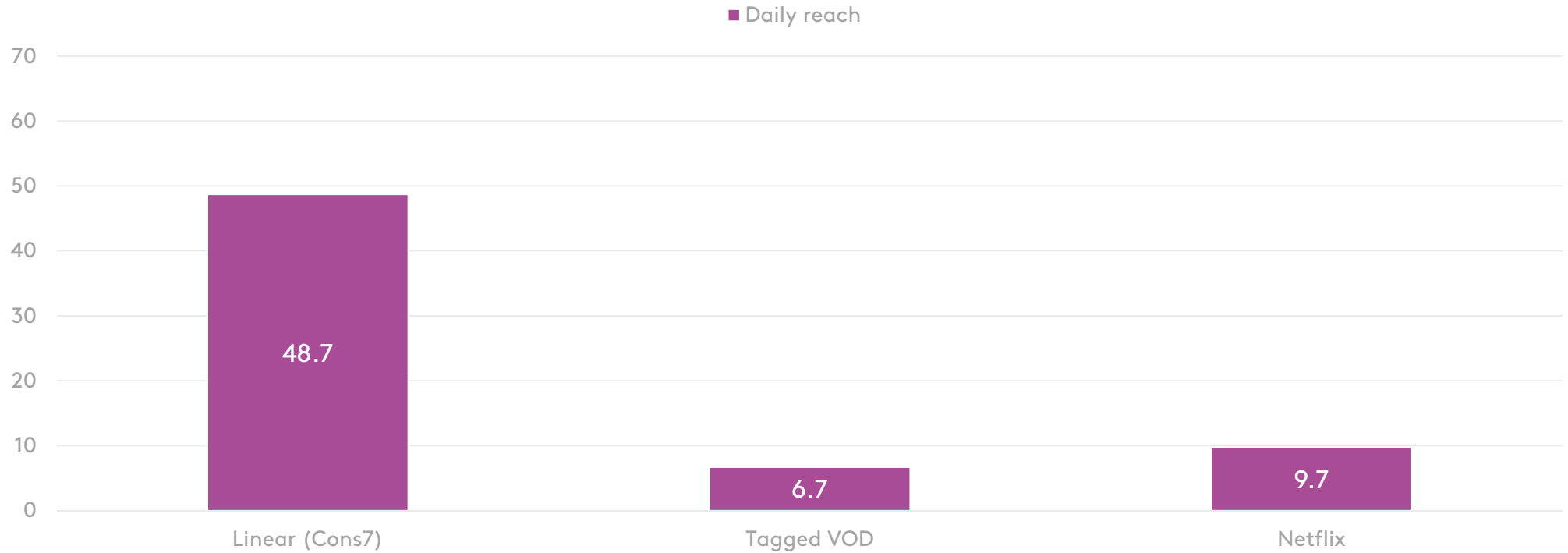


### Netflix viewing by Screen



# Daily reach

Tagged VOD and Netflix increases total daily reach





# Big Screens & Big Data - is this the future?

## Summary

1.

Viewing patterns and available devices have moved on since we first started Total TV measurement. Now the big screen is coming back into its own ("the best available screen")

2.

But as viewing fragments, we will increasingly need to expand our measurement base by integrating cross-screen measurement with reliable big data sets

3.

The growing use of non-broadcaster platforms must be reflected in our Total TV reporting – preferably with the new services sitting at the same table as our broadcaster stakeholders

Thank You!

**#**km**summit**