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# Television & Video Unbound

Overview of hybrid systems in development

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Research Director  
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# RATINGS LEGO



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# Potential Scope of Coverage

## Platforms

- Broadcaster players
- VOD
- SVOD
- Wider online video

## Content

- Programming
- Advertising

## Devices

- Computers
- Smartphones
- Tablets
- Connected TVs
- Other devices








The Solution?

**HYBRID**






**FUSION**



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		Claimed recall / survey research	Passive meters (fixed)	Portable meters	Census Data
		Day after recall, diaries	PeopleMeters, webmeters on PCs	Typically use audio recognition (code or fingerprinting)	IP data, server data, cookie data, customer databases
<b>Accuracy of exposure</b>		Medium	High if compliance good	Medium/High if compliance good	High
<b>Granularity</b>		Low	High	High	Very high
<b>Demographics</b>		Yes	Yes	Yes	No
<b>Long tail</b>		High if brand aware	Low	Low	Very high
<b>Cross-platform reach</b>		High	Low	High	Low unless fusion
<b>Brand attribution</b>		Yes	No	No	No
<b>Speed of delivery</b>		Medium (low for diaries)	Overnight	Overnight	Realtime if API
<b>Cost</b>		Low/medium	High	High /medium	Low

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		Claimed recall / survey research	Passive meters (fixed)	Portable meters	Census Data
		Day after recall, diaries	PeopleMeters, webmeters on PCs	Arbitron, Ipsos, Mediacell, Symphony AM	IP data, server data, cookie data, customer databases
Accuracy of exposure		Low	High if compliance good	Medium/High if compliance good	High
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# Single Source



- Would require a spectacularly large sample size to cover all brands and platforms
- Unrealistic volume of info needed from respondents
- Resulting in an unreasonable task load
- More possible for planning (e.g. TGI) than trading
- ..and as a hub survey for fusion of Big Data sources

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# Fusion Challenges



- Dependence on data that could be withdrawn
- Fusions are usually static rather than dynamic
- Complexity / black box: few will truly understand how it works
- Will it be acceptable for trading?
- Industry currencies invest a significant amount in high quality fieldwork.
- ..so fusion source will need to be impeccable

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# Seven markets:

Different stages – different approaches?



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# BARB



- Publishing TV Player Report since Sept 2015
  - Separate ‘audited’ measure of broadcaster player streams
  - Tagging within player from Kantar

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## Top 50 on-demand programmes

Week ending 24th April 2016



	Programme	TV Player	Avg Programme Streams
1	Eastenders 19/04/2016	BBC A, I, W	316,664
2	Eastenders 21/04/2016	BBC A, I, W	309,717
3	Eastenders 18/04/2016	BBC A, I, W	305,303
4	Eastenders 22/04/2016	BBC A, I, W	289,842
5	Made In Chelsea S11E2	ALL 4 A, I, W	222,227
6	Peter Kay's Comedy Shuffle: Episode 1	BBC A, I, W	179,039
7	Line Of Duty Series 3 Episode 5	BBC A, I, W	170,912
8	The A Word: Episode 5	BBC A, I, W	165,038
9	Have I Got News For You Series 51 Episode 3	BBC A, I, W	163,253
10	Undercover: Episode 3	BBC A, I, W	144,931
11	The People V Oj Simpson: American Crime Story: The Verdict	BBC A, I, W	139,957
12	Elizabeth At 90 - A Family Tribute	BBC A, I, W	137,000
13	Masterchef Series 12 Episode 13	BBC A, I, W	120,195
14	Marcella Episode 0003	ITV A, I, W	118,166
15	I Want My Wife Back: Episode 1	BBC A, I, W	111,219
16	The Island With Bear Grylls S3E4	ALL 4 A, I, W	110,753
17	Five Star Babies: Inside The Portland Hospital: Episode 2	BBC A, I, W	104,080
18	Masterchef Series 12 Episode 15	BBC A, I, W	103,975
19	Masterchef Series 12 Episode 14	BBC A, I, W	103,564
20	First Dates S4E27	ALL 4 A, I, W	100,148
21	Coronation Street (Series 57) 2016 Episode 8886	ITV A, I, W	95,885
22	Masterchef Series 12 Episode 17	BBC A, I, W	95,567
23	Britain's Got Talent (2016) S10 Episode 0003	ITV A, I, W	91,852
24	Coronation Street (Series 57) 2016 Episode 8885	ITV A, I, W	91,284
25	Masterchef Series 12 Episode 16	BBC A, I, W	91,008
26	Preview: Doctor Who: Friend From The Future	BBC A, I, W	90,468
27	Casualty Series 30 A Clear Conscience	BBC A, I, W	89,998
28	Coronation Street (Series 57) 2016 Episode 8884	ITV A, I, W	87,726

	Programme	TV Player	Avg Programme Streams
29	Stacey Dooley in Greece: Migrant Kids In Crisis	BBC A, I, W	86,862
30	Coronation Street (Series 57) 2016 Episode 8888	ITV A, I, W	84,599
31	The Graham Norton Show Series 19 Episode 5	BBC A, I, W	82,540
32	Have I Got News For You Series 51 Episode 2	BBC A, I, W	79,687
33	4 O'Clock Club Series 5 Babysitting	BBC A, I, W	77,408
34	Coronation Street (Series 57) 2016 Episode 8887	ITV A, I, W	76,773
35	The Real Housewives Of Cheshire (Series 3) Episode 0003	ITV A, I, W	75,133
36	Bake Off Creme De La Creme: Episode 4	BBC A, I, W	73,059
37	Witless: Episode 1	BBC A, I, W	70,119
38	Michael McIntyre's Big Show: Episode 1	BBC A, I, W	68,691
39	Line Of Duty Series 3 Episode 4	BBC A, I, W	68,480
40	The Durrells Episode 0003	ITV A, I, W	67,808
41	Lost & Found Music Studios: Day After Day	BBC A, I, W	66,224
42	Scott & Bailey (Series 5) Episode 0002	ITV A, I, W	65,341
43	Britain's Got Talent (2016) Episode 0002	ITV A, I, W	64,748
44	Victoria Wood: Seen On TV	BBC A, I, W	64,008
45	Eastenders 15/04/2016	BBC A, I, W	63,526
46	Emmerdale (Series 45) 2016 Episode 7480	ITV A, I, W	61,488
47	Holby City Series 18 Prioritise The Heart	BBC A, I, W	61,387
48	Emmerdale (Series 45) 2016 Episode 7479	ITV A, I, W	60,128
49	Emmerdale (Series 45) 2016 Episode 7481	ITV A, I, W	59,732
50	Emmerdale (Series 45) 2016 Episode 7483	ITV A, I, W	57,443

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Only viewing time for audited platforms is included. See page 20.  
Excludes live streaming and viewing of broadcaster's content through third-party apps such as Sky Go.

A = Android app, I = iOS app, W = Website player  
BARB's TV Player Report Page 8

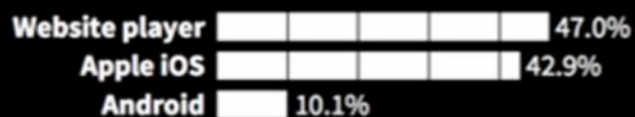


## TOTAL TV PLAYER APP VIEWING

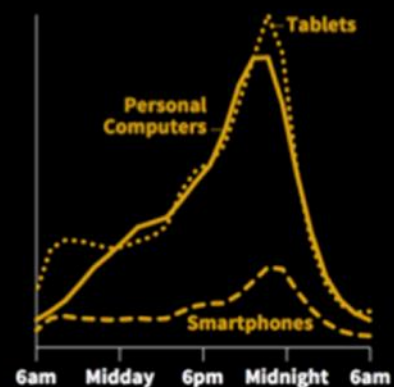
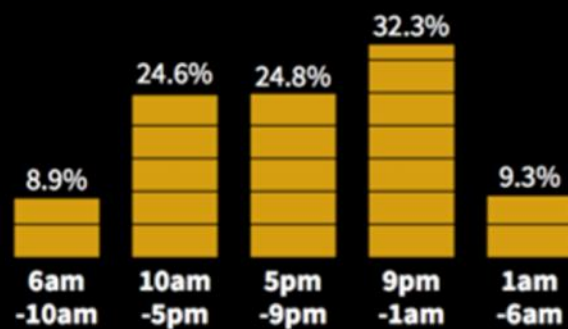
By device



By operating system



By time of day



Source: BARB Viewing Report 2016

# BARB



- Publishing TV Player Report since Sept 2015
  - Separate ‘audited’ measure of broadcaster player streams
  - Tagging within player from Kantar
- ‘Dovetail’ initiative
  - Fuse player census data to core BARB panel
  - Likely ‘hook’ is VirtualMeter online measurement of sub-set of meter panel
- Objective: Viewing by demos across all platforms
- Running prototypes with Kantar & Nielsen. Decision expected summer. Go live mid 2017 or earlier?



# Nielsen US



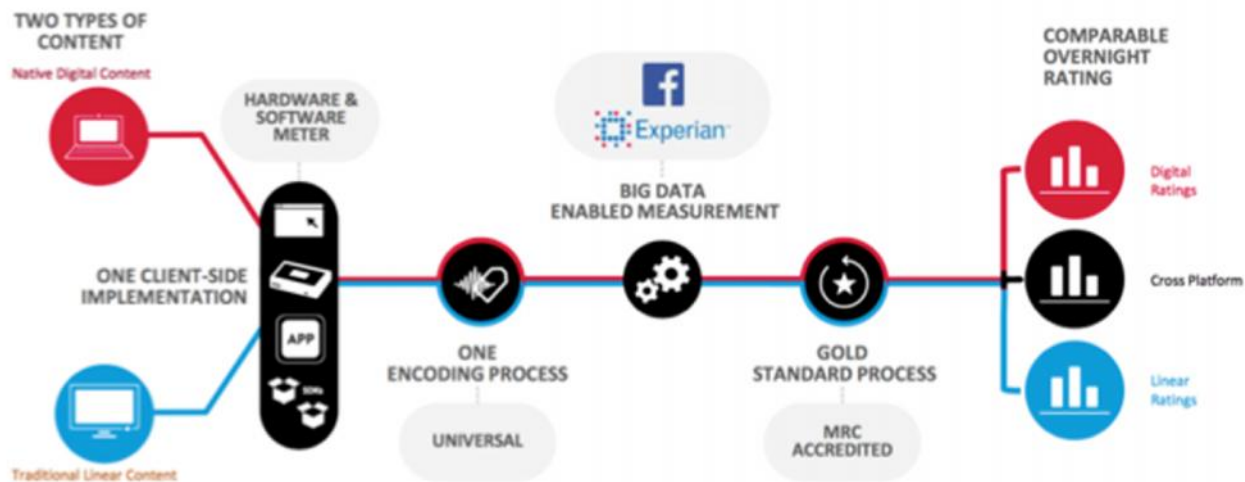
*“Unduplicated ratings across all screens, platforms and distribution models.”*

- ‘Total Content Ratings’

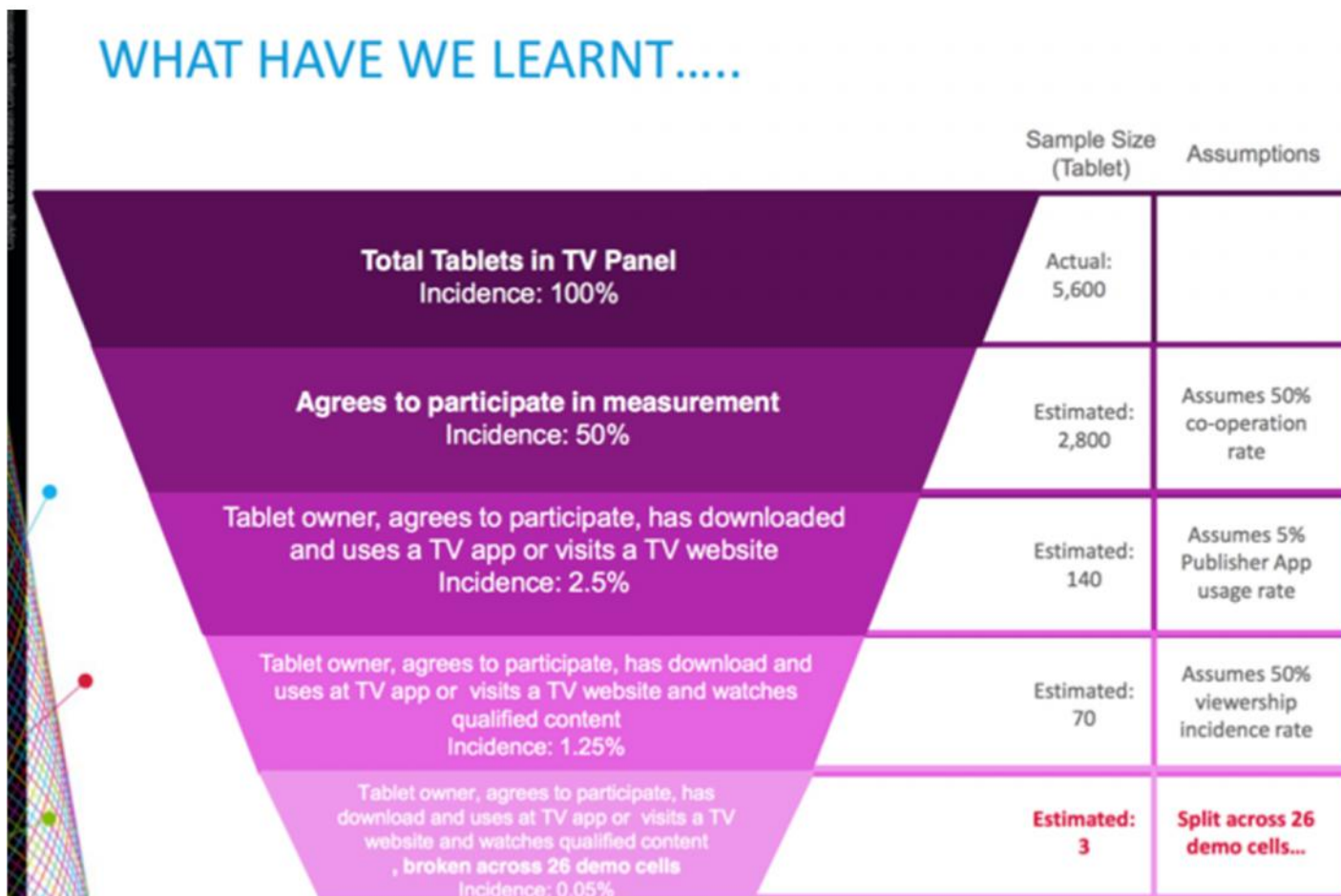
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# HOW IS IT CREATED – WITH AND WITHOUT 3<sup>RD</sup> PARTY DATA PROVIDERS



## WHAT HAVE WE LEARNT.....



US Study.

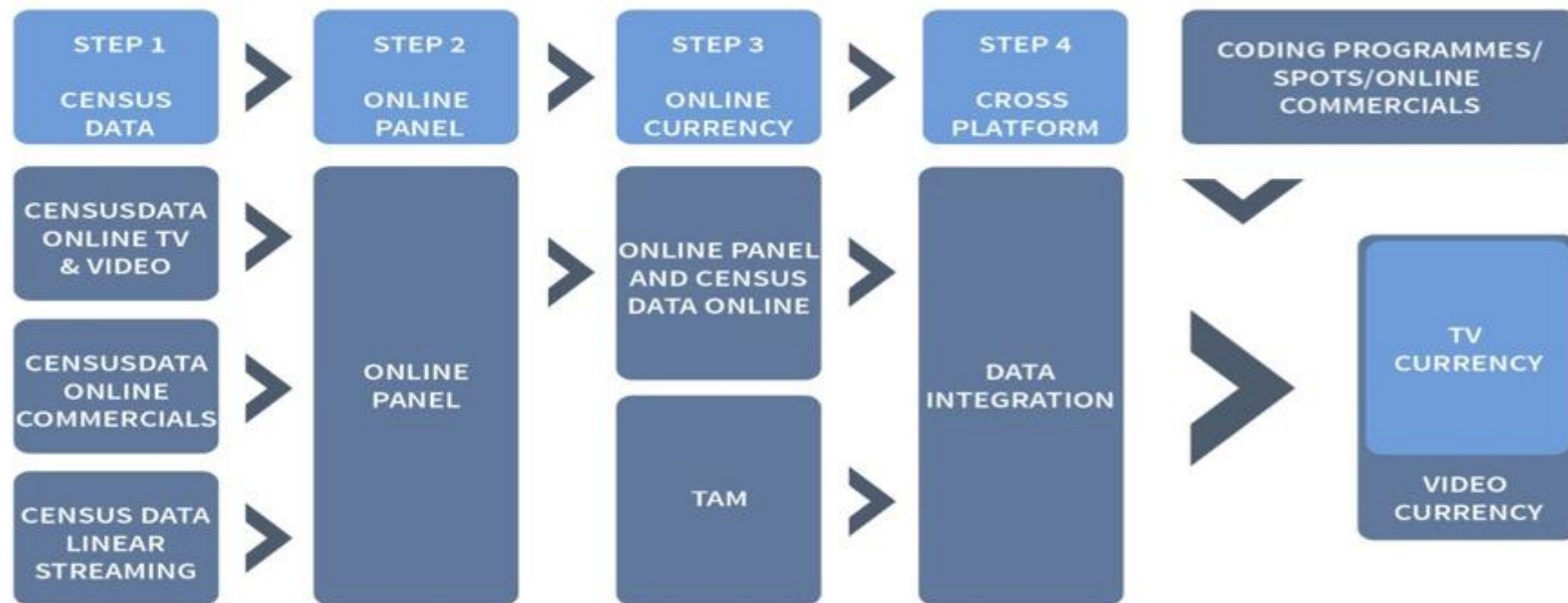
# Netherlands



- Video Integration Model (VIM)

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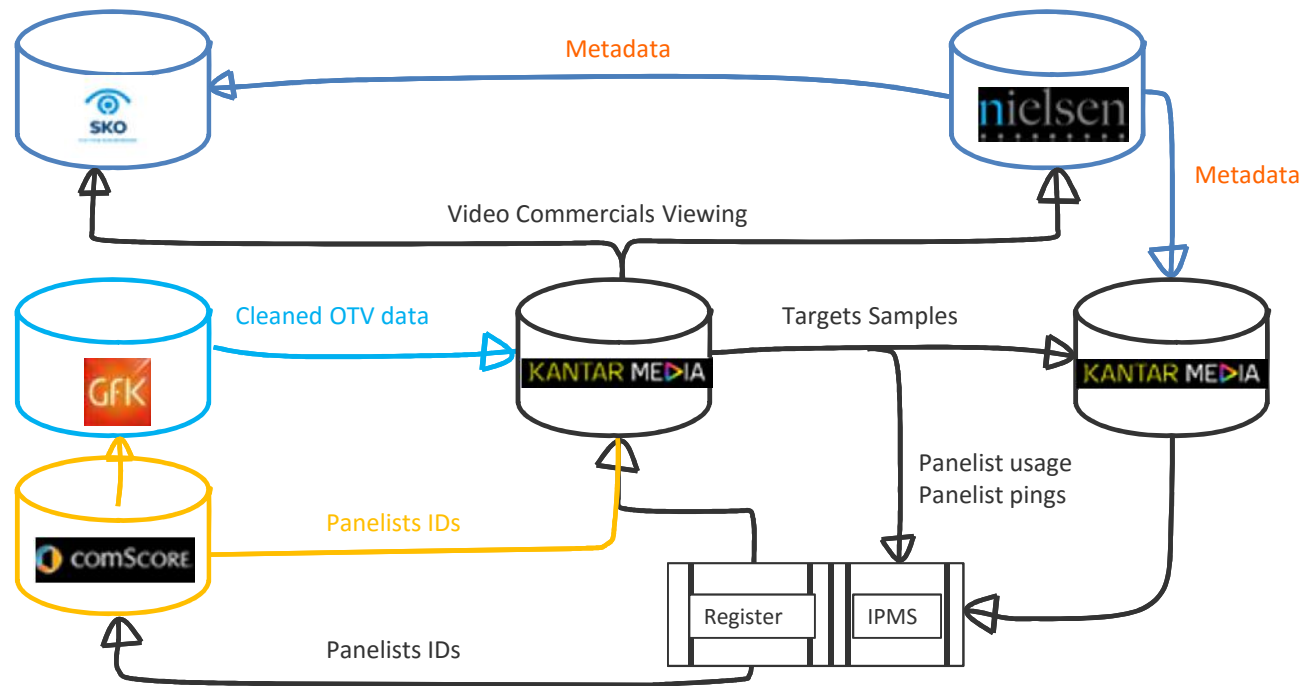
# SKO's Ambition : The Ratings "factory"



- Online TV ratings – with demos – went live in January 2016
- Next stage is to fuse data to TV meter panel



# The Netherlands' Total Video Solution is the perfect example of the new partnership reality





# France

Media Owned Company: Mediametrie



## Television broadcast



## Online broadcast

### Panel

**Panel size**

- **Panel members:** 12,000  
(2015 universe: 58,249,000)
- **TV Households:** 5,000  
(2015 universe: 26,826,000)
- **Age definition:** 4+

### Return Path Data

No RPD from any platform scheduled to be part of the TAM currency so far

### Market survey

**Measurement**

- **Since:** 02/01/1989
- **Technology:** people meters  
(Watermarking since Dec 2008)
- **Currency:** Live + 7 days
- **Research Institute:** Médiamétrie

### Hybrid measurement

**Panels**

- **Current panels:**
  - > PC: 20,000 individuals (software meters)
  - > Smartphones: 10,000 indiv. (logs meters)
  - > Tablets: 3,000 individuals (Proxy meter)
- **Single source panel in 2017 for all 4 screens**

### Proprietary survey (T1 2016)

**Measurement characteristics**

- **Hybrid measurement:**
  - > Panels (for target profiles)
  - > Site centric measurement (for extrapolation)
- **Site centric measurement:**
  - > Covers most broadcasters
  - > E-stat streaming technology
- **Proprietary tool so far**



## 4-Screen measurement

### Hybrid measurement

Proprietary survey (S1 2016)

**Schedule**

- S1 2016: Number of viewers per program
  - > Daily deliveries
  - > Breakdown by screen / no target profile
- S2 2016: Reach and target profile per program



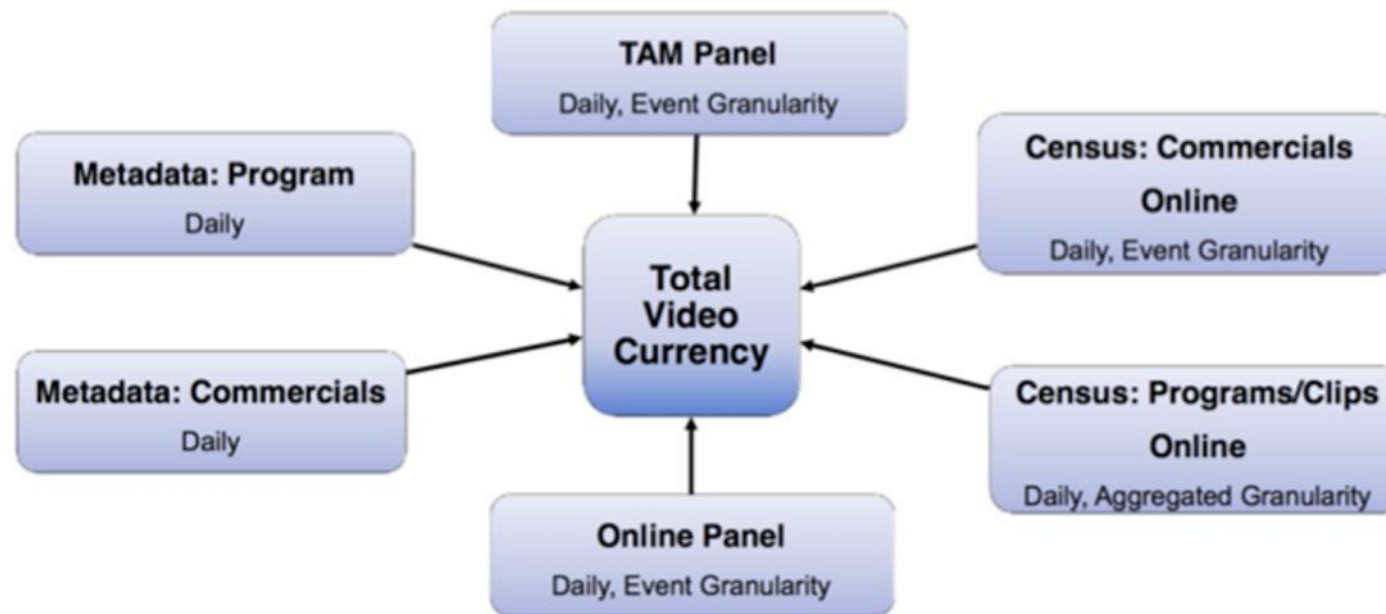
# Sweden



*“To launch and maintain a fully accepted media currency covering all video consumption on all platforms, screens and situations”*

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## MMS setup: data sources





# Denmark



Goes live Jan 2017

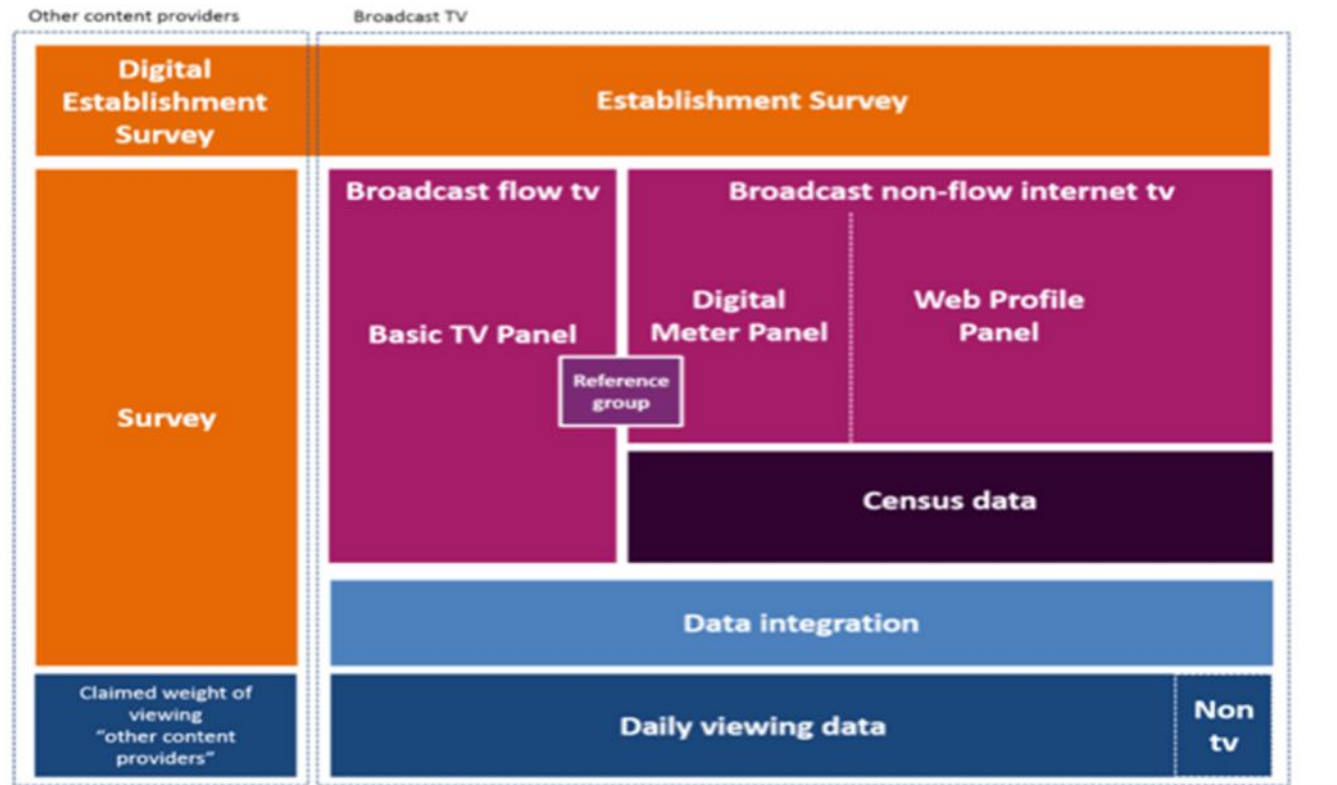
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# Components



- TV panel
  - Expanded to 1200 homes but will only measure TV set usage
- Digital meter panel
  - 1000 individuals – all digital devices measured via tagging technology
- Web profile panel
  - 25000 individuals – cookie panel for niche viewing behaviour
- Census data
  - Verification and data integration
- Establishment Survey
  - 10,000 p.a.

# The model



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TNS Gallup  
2016  
© TNS

KANTAR MEDIA  
Powering Informed Decisions

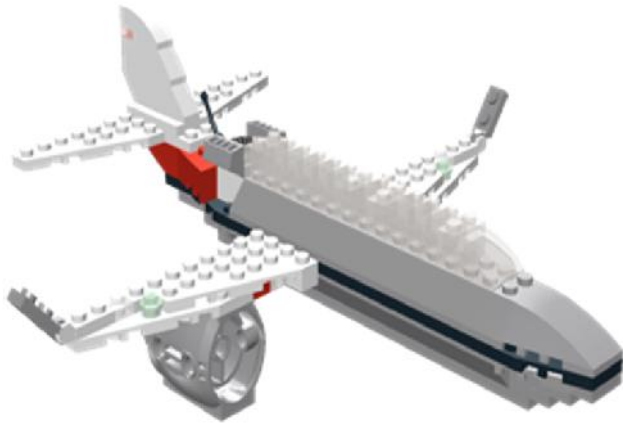
# India



- BARC issued an RFI in November ( 11 responses), followed by an RFP in February for Digital Measurement
- Competitive tender currently underway
- Tender encompasses:
  - Digital measurement on TV panel
  - Census measurement
  - Fusion
- “BARC India aims to measure all forms of Online Video Advertising, including ad breaks in live streams, pre-roll and mid-roll videos, and targeted/addressable advertising linked to the content on broadcaster sites or social media or any other website/apps”. BARC Dec 7<sup>th</sup> 2015

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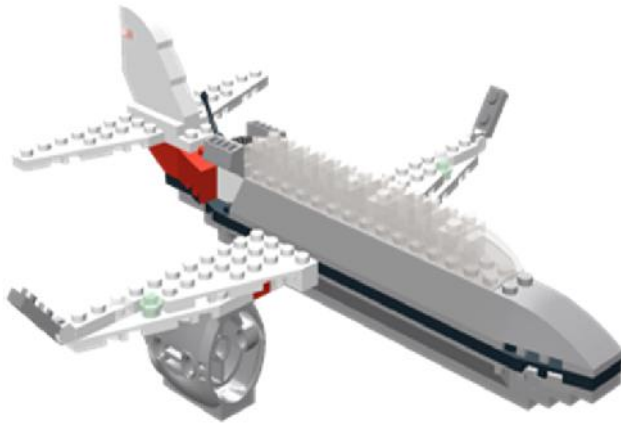
# Conclusions



- Hybrid contractors not just hybrid solutions
- Closer relationship with clients
  - ‘a team sport’
- An element of single source is useful, but is it a realistic response load?
- Is the TAM panel large enough for online demographics or is a separate online panel needed?
  - Dutch and Swedish approaches may have wider application?
- Additional sources of demographics – eg Facebook

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# Conclusions



- Minute-by-minute viewing levels are lower than streams / reques
- Establishing the parameters of the service
  - TV or all video
  - Content vs advertising
- Boundaries between currencies starting to break down?
- Transparency vs 'Black box'

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# Set Top Box Data



“ working with large samples would achieve a number of objectives; an increase in effective sample sizes, reduction in data variability and providing certainty on the identification of new forms of dynamically inserted advertising.” **BARB Viewing Report 2016**



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# Television & Video Unbound

Overview of hybrid systems in development

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