

asi 2015 European Television Conference

Television & Video: A Beautiful View?

Wednesday 4th to Friday 6th November 2015

Hilton Molino Stucky Hotel, Venice



Venice has one of the most beautiful and historic city skylines in the world. However, the debate at last year's **asi** Television conference seemed at times like the skyline of a major new city – lots of cranes and many exciting architectural designs for what would happen. A consensus emerged around hybrid approaches to cross-platform video, but there was not much actual data to be seen. So, a year later and with a lot of construction work underway, are the foundations of our new measurement conurbation in place?

In the first session we learn how the media citiscape continues to evolve, hearing from big players, the disruptors and the analysts, showing that television and video technology will always be a moving target for measurement. We then focus on the advertising dimension – with television a cross-platform, multi-device medium, how can advertiser money be spent most effectively? Is the future programmatic or does context still matter? We also exclusively reveal a new survey of advertisers, planners and analysts.

On Friday the emphasis is squarely on the systems being maintained and built to measure the media skyline. Whilst we hear about the growing role of RPD, server and 'big' data, we also learn how innovations continue to keep the core meter panels fit for purpose. Speakers also unveil the first fruits of data from hybrid cross-platform video systems and new single-source approaches to the linking of television viewing to wider online behaviour. Will these new buildings live up to their impressive architectural designs?

Joint Session for Radio & Television

Wednesday 4th November 2015 (afternoon)

15.20 Chairman's opening remarks

Richard Marks, Research Director, **asi**

Our joint session brings television and radio delegates together to look at a series of innovative efforts being made to measure both the combined and unique strengths of the two media. Meanwhile, as this is **asi**'s 25th year, we celebrate the community we've built together with a look at what past events may tell us about the future. To end the day we're delighted to welcome media crystal ball gazer Professor Jeffrey Cole to give our 25th anniversary address.

15.25 Cross-media research in US plots Radio Lift off!

Joan FitzGerald, Senior VP Television and Cross-Media Service, comScore, Inc.

Cross-media research often explores the incremental audience lift from digital media when combined with TV. But there's another compelling story: the incremental lift from Radio.

15.45 Understanding multi-platform media audiences – how the BBC is meeting the challenge

Sue Gray, Head of TV Audiences, BBC

The BBC is the only UK media owner that needs to measure and report two legacy platforms alongside online. A sequence of pilots is aiming to harness the combined strengths of passive digital measurement and survey research and is seeking to find if it is possible to get the best of both worlds.

16.05 The AdMeter cross media measurement system

Pavel Charamza, Research Director, Median

Combining outputs from mobiles, tablets, PCs, notebooks – using all technologies panel members use – the paper will explore how adMeter contributes to optimal campaign planning drawing on real data usage.

16.20 Using audio matching for contextual media surveys

Omri Halevi, CEO and co-Founder, Mobile Research Lab

Jacob Wieland, Senior Audience Researcher and Innovation Lead, DR – Danish Broadcasting Corporation

How can contextual surveys go beyond claimed media use and ask questions about certain types of pattern of media usage?

16.40 25 years of knowledge exchange at asi

Leendert van Meerem, Founder, LVMR

What have we learned? What is our future? Is the Radio Meter dead or alive? Is TAM as out of date as the words television and ratings?

17.00 KEYNOTE: Broadcast media at the tipping point – again

Jeffrey Cole, Research Professor and Director, The Center for the Digital Future

17.30 Panel Session

18.00 Celebrating 25 years of asi conferences

Delegates and speakers are invited to join us for a drinks reception to celebrate 25 years of asi conferences.

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TV's Continuing Evolution

Thursday 5th November 2015 (morning)

09.00 Chairman's opening remarks

Graham Lovelace, Media Technologies Director, **asi**

09.05 The way to complexity – evolutionary trends in the media system

Roberto Suárez Candel, Head of Media Intelligence Service, EBU

As technology enables new ways of media consumption and markets become more international, broadcasters must deal with increasing complexity when designing their production, programming and distribution strategies. What are the trends, risks and opportunities that television companies are facing nowadays across Europe?

09.25 The Italian Perspective – Two views from Italy (I)

Carlo Nardello, Strategic Development Director and Chief of Staff, RAI

09.45 The Italian Perspective – Two views from Italy (II)

Gina Nieri, Director of Institutional, Legal Affairs and Strategic Analysis, Mediaset

How is live linear TV faring in Italy, and how are these broadcasters responding to the challenges and opportunities of internet distribution? Digital terrestrial television plays a vital role in Italy's TV ecosystem – what are the implications of broadcast spectrum changes?

10.05 New Entrants - The Disruptors

Discussion, Graham Lovelace talks with...

Luca Colombo, Country Manager, Facebook Italy

Christian Bombrun, VP Marketing, Entertainment and Digital, Orange

Telecommunications groups and social networks offer broadcasters and content producers opportunities for new distribution and new monetisation. How has Orange France addressed the television opportunity, as well as content opportunities on the second screen? What is Facebook's video strategy, and what can the social network offer advertisers? How do both players regard incumbent broadcasters, and subscription VOD players such as Netflix? Where do they see TV heading?

10.30 Coffee

Coffee breaks throughout the 2015 European Television Conference are sponsored by



11.00 Broadcaster Strategies

Technology is transforming the television experience, offering viewers even more choice and convenience, and new means of content discovery. In this session we hear how two leading public broadcasters, an international channel provider, and Europe's leading cable operator are addressing the opportunities. What role is data playing in improving services for viewers? Do viewers want a more personalised TV experience? How are younger viewers responding to increased viewing choices, across multiple screens and devices?

11.00 Robert Amlung, Head of Digital Strategy, ZDF

11.10 Christian Kurz, Senior VP Research and Insights, Viacom International Media Networks

11.20 Phil Fearnley, Director, Homepage and myBBC, BBC

11.30 Mark Giesbers, VP Video Products, Liberty Global

11.40 Panel Session

12.10 Redefining TV: The Analysts' View

New technologies and new entrants are stretching the definition of television. It's no longer constrained by a particular device or viewing behaviour. But what is the new TV? Is subscription VOD a form of television? A show streamed live over a social network – is that TV? How might telecommunications groups and tech giants force a further redefinition of TV? Leading media, technology and telecoms analysts give us their views, and respond to the morning's discussions.

Nigel Walley, Managing Director, Decipher

Paul Lee, Partner, Deloitte

Paolo Pescatore, Director of Operator Strategy, Applications and Content, CCS Insight

12.40 Lunch

Spending Advertising Money

Thursday 5th November 2015 (afternoon)

14.00 Chairman's opening remarks

Brian Jacobs, Founder and CEO, BJ&A

14.05 Challenging the status quo: best TV practice for innovators

Martha Velando, European MD, Marketing Effectiveness, Nielsen

Television measurement has been around for ages, but things have developed dramatically in recent years with a need to be predictive and act in real-time when it comes to TV advertising effectiveness. The paper looks at how TV and online best work together to maximize both reach and resonance, driving successful campaigns.

14.25 Channel 4's inner Gogglebox

Pedro Cosa, Head of Data Planning and Analytics, Channel 4

How Channel 4's investment into understanding viewers watching TV has led to new advertising models, insights and consumer experiences.

14.45 Planning, buying and selling TV in a programmatic world

Rupert Staines, Managing Director, EMEA, Radium One

What does 'programmatic' mean in relation to TV planning, buying and selling, and how will this evolve? How can agencies plan and buy TV across the range of broadcast TV and online options?

15.00 Monetizing appreciation: the effects of programme engagement on commercial effectiveness

Lex van Meurs, Research Director, Media, GfK

This year, Ster, the sales house of the Dutch Public Broadcasters, started offering premium GRP packages for campaigns in advertising breaks around programmes with a high appreciation score, as reported daily for all programmes in the GfK Appreciation Panel. Three case studies prove the positive effect of appreciation on campaign effectiveness.

15.20 Panel Session

15.40 Coffee

16.05 The challenge of measuring cross-platform

Alex North, Head of Measurement Partnerships, Facebook

Facebook has implemented a range of partnerships and conducted research to help clients and the broader industry understand how to drive campaign impact across platforms, particularly across TV and digital platforms. This presentation will cover the challenges faced to date, how these have been addressed while maintaining methodological robustness and some of the key questions that remain.

16.20 Evaluating TV effectiveness in a changed media landscape

Luis Chaves, Vice President Strategy EMEA, Marketshare

Today's video consumers have more choice than ever of where to find the news, information, entertainment and other content they want. In this new environment, how should marketers consider television in the context of the broader marketing mix?

16.40 Spending Advertising Money – Study

Louise Cook, Managing Director, Holmes and Cook

This study, commissioned by **asi**, seeks to gauge both the practical and emotional concerns of advertisers and analysts in 2015. What are they currently striving to measure? What have been their successes? What are their greatest frustrations? How does this impact how advertisers spend their advertising money?

16.55 Connecting with consumers – emotional values and digital behaviours

Tracey Follows, Founder and Futurist, AnyDayNow

TV advertising and its mass mainstream audiences depend upon the recognition of what humans have in common, what brings them together. But advertising and technology do not approach creativity in the same way. Respecting their difference is essential to remaining in touch and communicating effectively with people.

17.15 An advertiser's view

In discussion with Brian Jacobs:

Richard Brooke, Media Operations and Strategy Director Europe, Unilever

17.30 Panel Session

17.55 Close of Day

Measurement: From Talk to Action

Friday 6th November 2015 (morning)

09.00 Chairman's opening remarks

Richard Marks, Research Director, asi

09.10 Is there a missing link in the evolution of TV measurement?

Andrea Mezzasalma, Head of Audience Research and Insights, Sky Italia

To cope with the fragmentation of TV, Return Path Data from Set Top Boxes are increasingly used together with People Meter Panels. There are well-known problems with STB data, however. What if we were able to detect whether the TV set is actually on and tuned into the STB? Could this be a missing link in the evolution of TV measurement?

09.30 Ten years of RPD – looking back, looking forward

Nick Burfitt, Global Director of Audience Targeting, Kantar Media

Will Koning, Chief Research Officer, Kantar Media

What learnings/insights have been gleaned in the 10 years since Kantar launched the first RPD service? Drawing on case studies and experience from around the world, the paper looks at how operators have been unlocking the value of their subscriber viewing data and outlines a course for the future.

09.50 Future proofing – investing in the digital behaviour of the Dutch TAM panel

Liesbeth Nekkers, Research Director TV and Radio Audience Measurement, GfK

Mariana Irazoqui, Research Director, SKO

Even though a lot of focus and energy is devoted to the online video measurement on connected devices, SKO recognizes the continuing importance of the existing television audience measurement on TV-sets at home. Working with GfK, SKO has introduced innovations to guarantee a high-quality measurement of the Dutch viewing behaviour within the TAM panel.

10.10 Less TV viewing – or less coverage of TV viewing in TAM panels?

Bernhard Engel, Research Director, ZDF

Robert Nicklas, Director TV Audience Measurement, GfK

The coverage of TV viewing in TAM Panels is not as complete as in years before, due to an increasing amount of 'missing values'. AGF has introduced methodological changes that 'counteract' missing values due to gaps in the installation of TV sets and non-registration, increasing net reach up to 12% especially in younger target groups.

10.30 Panel Session

10.50 Coffee

11.20 Unduplicated ratings across all screens, platforms and distribution models

Megan Clarken, EVP Global Product Leadership, Nielsen

Introducing Nielsen Total Audience Measurement to continue to improve the US TAM service.

11.40 Measuring on-demand viewing from a single-source panel

Lisa Eaton, Senior VP Member Engagement, Numeris

Ricardo Gomez-Insausti, VP Research, Numeris

The Canadian industry wanted on-demand viewing – the viewing of video content available through both set-top box VOD services and broadcaster websites – to be measured by a single-source panel. This paper reports on the evaluation of feasibility of this type of measurement.

12.00 Terra incognita – measuring ALL out of home viewing in Norway

Håkon Lund Sørensen, Director, NRK

From 1st July 2014 all TV viewing outside private homes was included in the official TV currency in Norway by combining traditional TAM data with PPM data, giving a significant increase in ratings reported. What was the method used and what are the new insights into the audience and the way forward?

12.20 Panel Session

12.40 Lunch

Beyond the TV Set

Friday 6th November 2015 (afternoon)

14.00 Chairman's opening remarks

Kristian Tolonen, Research Director, NRK

14.05 What does the UK industry want BARB to measure?

Justin Sampson, Managing Director, BARB

BARB is consulting its customers on their requirements in preparation for new contracts from 2019. What does this tell us about the changes that are required for TAM services to stay fit for purpose?

14.25 Did we do it? Daily online ratings?

Bas de Vos, CEO, SKO

Jonathan Brown, Group Director, Kantar Media

SKO has been working with Kantar Media since July 2014 on deploying its Videodata Integration Model (SKO-VIM) to report on Online Video Usage in a way that is comparable with TAM data around the globe. The 'go-live' of SKO-VIM means the first real hybrid project in the world that delivers daily ratings for online programs and commercials.

14.45 Total video measurement – the long and winding road toward data integration

Pirjo Svedberg, Director, MMS

Rolf Müller, Director, GfK

The task is to integrate off- and online viewing and to report with the same precision, stability and analytic capabilities and to calculate unduplicated reach and frequency over all platforms as in traditional offline TV measurement. The paper will present the first data and reports from the integrated service – peplemeter data and online video data combined.

15.05 Panel Session

15.25 Coffee

15.50 Single-source panel – a way forward towards 4 screen TV measurement?

Laurent Battais, Director, Médiamétrie

New learnings from the Google and Médiamétrie TV and Web single-source panel.

16.10 First fruits

Isabel Serrano, Global Director Strategic Partnerships, Kantar Media

Paul Goode, SVP Strategic Partnerships, comScore

In February 2015, Kantar Media and comScore formed a strategic alliance to accelerate cross-media measurement solutions around the world. In this paper Isabel and Paul will discuss the first fruits of the harmonious partnership so far, including the work being conducted in Spain to measure audiences and campaigns across multiple platforms.

16.30 How fast will the broadcast to online displacement be?

Toby Syfret, Senior Analyst, Enders Analysis

The last few years have seen major changes in how we can view video content and new giants are emerging; be they Google, Apple, Netflix or Amazon. Much is written about how these new giants of the landscape are transforming the broadcast television landscape, especially in the US. Yet, although we are seeing a significant shift from broadcast to online, it is by no means the same across all countries. What we see happening in the US is only a guide to what we may expect elsewhere, as we take account of many other factors that will shape developments at a local country level.

16.50 Panel Session

17.10 Tony Twyman Award

This annual award of 1500 euros is presented to the conference paper that makes the ‘best contribution to a greater understanding of the TV medium and its audiences’.

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17.15 Close of Conference

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