Measuring net reach of TV & video online: overview of existing and potential cross-media surveys

Matthew Carver/egta

tvday

Measuring net reach of TV & video online

Capturing TV's missing eyeballs

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Matthew Carver, Head of Insight

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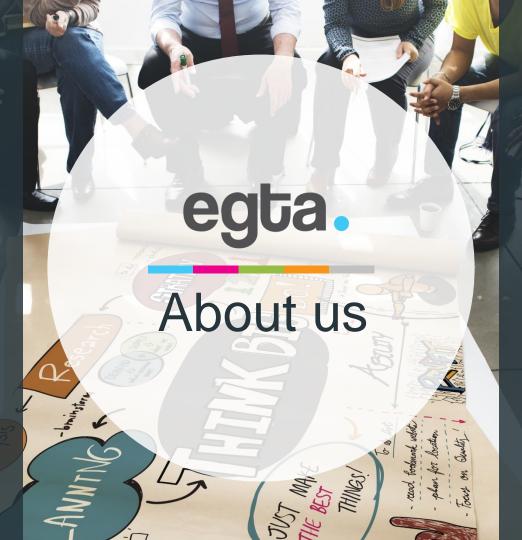
Preparing

for the future

Preparing for the future: objectives

- To transfer the **high quality of television audience measurement** – the most reliable and robust of any medium – **into the digital realm**

- To ensure that **all television viewing** – and perhaps all video viewing – is measured to the **same high standard**
  - Benefits for television broadcasters and sales houses
  - Benefits for advertisers and media agencies

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Who we are

European trade association for marketers of **advertising solutions across (multiple) screens and/or audio platforms,** with the aim to optimise revenue around the **content edited** and broadcast on a **linear basis** on television and/or radio.

Our mission

Assist and enable television and radio sales houses to **monetise effectively audiovisual content through advertising solutions,** regardless of the device or platform it appears on.

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About us

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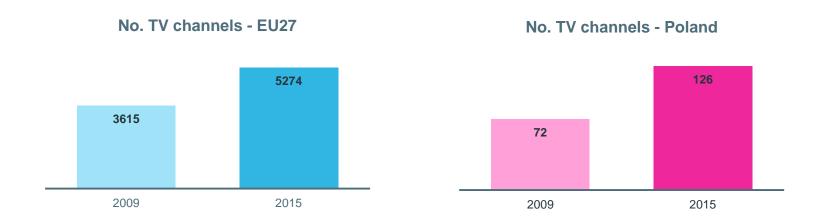
Our members

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Our members

In Poland:

Changing
landscape

Fragmentation of channels

- More and more channels are becoming available, increasing choice over *what* to watch

No. TV channels - EU27

5274

3615

2009   2015

No. TV channels - Poland

126

72

2009   2015

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Fragmentation of devices

- More and more choice over *how* and *where* to watch

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Perception

Reality

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Alternative

facts?
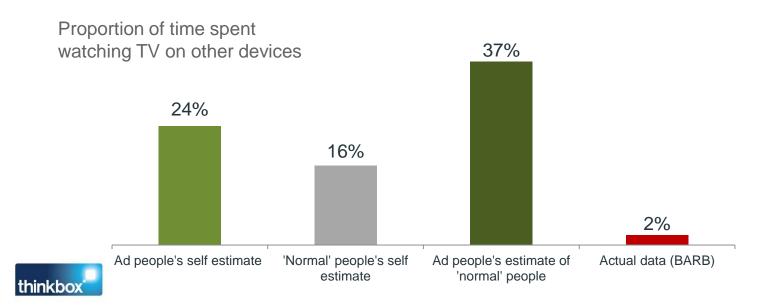
Perception vs. reality
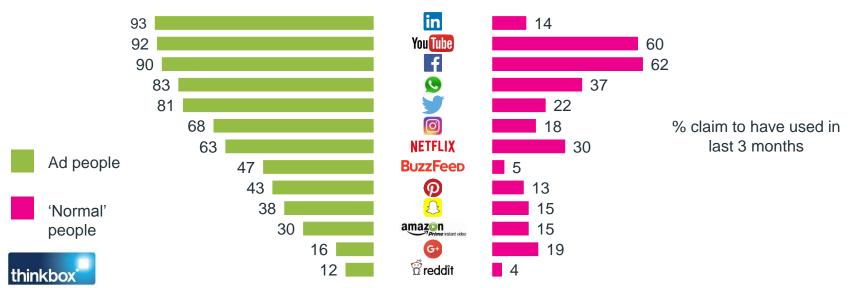
- Industry overestimates device usage by some margin (UK)

Proportion of time spent
watching TV on other devices

24%
'Ad people's self estimate

16%
'Normal' people's self
estimate

37%
Ad people's estimate of
'normal' people

2%
Actual data (BARB)

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Perception vs. reality

- Ad people are social media & SVoD addicts

	Ad people	Platform	'Normal' people
	93	LinkedIn	14
	92	YouTube	60
	90	Facebook	62
	83	WhatsApp	37
	81	Twitter	22
	68	Instagram	18
	63	NETFLIX	30
	47	BuzzFeed	5
	43	Pinterest	13
	38	Snapchat	15
	30	amazon Prime instant video	15
	16	G+	19
	12	reddit	4

Ad people (green)

'Normal' people (pink)

% claim to have used in last 3 months

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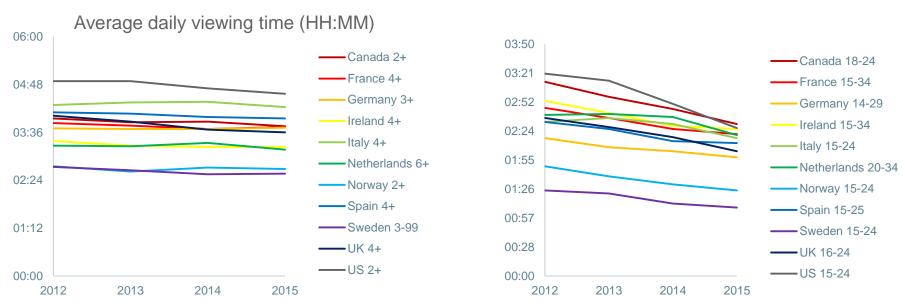tv
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Consequences

of fragmentation

Consequences of fragmentation

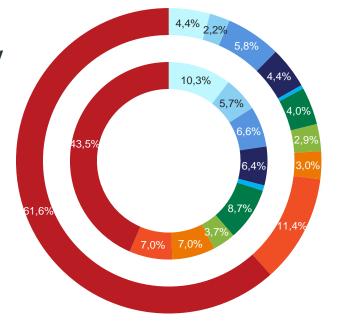- Less viewing takes place on the traditionally measured TV set, particularly for younger target groups

Average daily viewing time (HH:MM)

Average daily viewing time includes Live + Consolidated

Sources: Numeris (CA); Médiamétrie (FR); AGF (DE); TAM Ireland (IE); Auditel (IT); SKO (NL); Kantar Media (ES); MMS (SE); BARB (UK); Nielsen (US)

Understanding fragmentation

- TV accounts for the largest share of the video day

Average video time per day

All Individuals: 4hrs, 35 mins

16-24s: 3hrs, 25 mins

Inner ring:
- 10,3%
- 5,7%
- 6,6%
- 6,4%
- 8,7%
- 3,7%
- 7,0%
- 7,0%
- 61,6%

Outer ring:
- 4,4%
- 2,2%
- 5,8%
- 4,4%
- 4,0%
- 2,9%
- 3,0%
- 11,4%
- 43,5%

Legend:
- YouTube
- Facebook
- Other online video
- Online 'adult' XXX video
- Cinema
- Subscription VOD
- DVD
- Broadcaster VOD
- Playback TV
- Live TV

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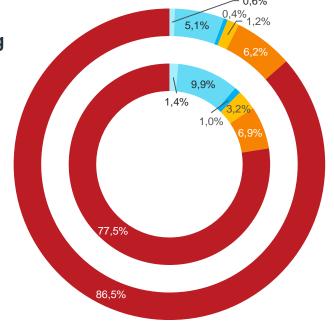
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Understanding fragmentation

- TV accounts for 94% of all video advertising time

Average video advertising time per day

All Individuals: 18.5 mins

16-24s: 12.8 mins

Outer ring: 5,1% / 0,6% / 0,4% / 1,2% / 6,2% / 77,5%

Inner ring: 9,9% / 1,4% / 1,0% / 3,2% / 6,9% / 86,5%

Legend:
- YouTube (est 15 secs per video)
- Other online (inc autoplay)
- Cinema
- Broadcaster VOD
- Playback TV
- Live TV

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TAM
today

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TAM today

- Panels are the ubiquitous means for measuring TV audiences

- People meters used almost everywhere:
  - audio matching
  - watermarking

- JIC/MOC models prevail throughout Europe

- PPM in Canada, also used for OOH in Norway
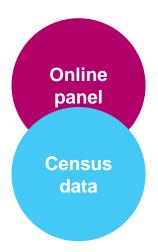
- Development of TSV measurement

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New

methodologies

First principles

Linear TV (& TSV)

TAM panel

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First principles

Linear TV (& TSV)

Non-linear TV/video

TAM panel

Online panel

Census data

Model 1

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First principles

Linear TV (& TSV)   Non-linear TV/video

TAM panel

Online panel

Census data

Online panel

Online panel

Model 2

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First principles
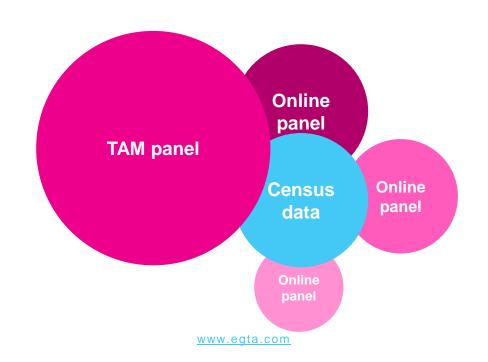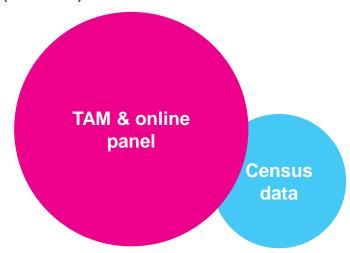
Linear and non-linear
TV (& TSV)

Non-linear TV/video

TAM & online panel

Census data

Model 3

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Panels and census-level data

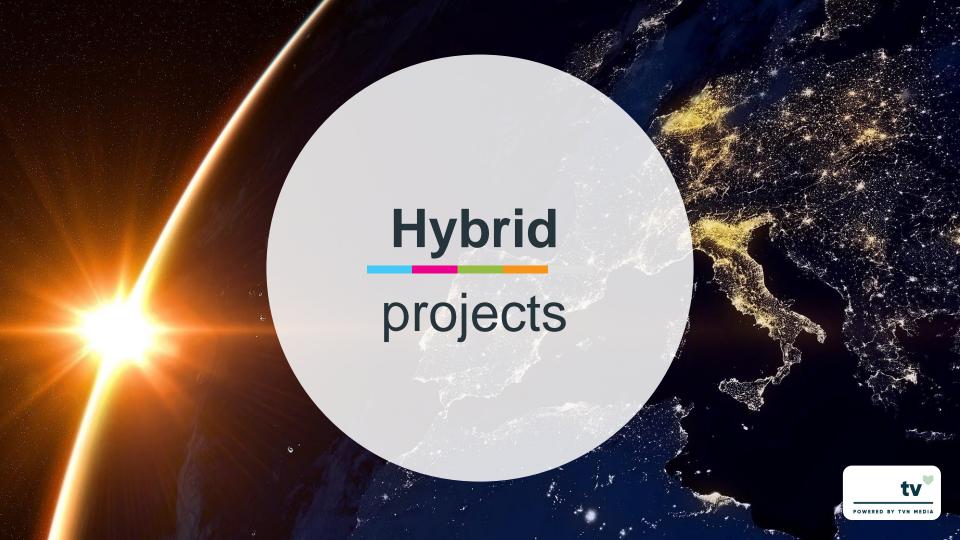- Panels and census data have different capabilities

Panel data	Census data
Respondent-level data reflective of viewers' behaviour	Comprehensive and exact account of all online activity
What, who and when	What and when
Offers: • Reach estimates • Demographic profiles	Offers: • Total usage • For all websites and apps

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Questions and considerations

- What should be included in the scope of measurement?
- What technologies should be used?
  - **Panels:** software meter, router, set-top box, physical meter
  - **Census:** set-top box, video players, programmatic advertising
- One panel for TAM and online (single source) or multiple panels?
- How to address the conundrum of currencies?
- How to ensure TAM-level accuracy?
- How to carry out data fusion?

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Hybrid

projects

Markets developing hybrid measurement

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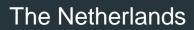It's

complicated

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Differences between Europe & US

- TV landscape and measurement model quite different from Europe
  - No measurement JIC – Nielsen is the primary supplier of ratings
  - Also working towards Total Audience solution for all video viewing
  - Other players involved – Rentrak, bought by comScore
  - Role of MVPDs, which control their own STBs – can generally sell two minutes of local advertising
  - Therefore, household addressable advertising and programmatic television is developing faster in US than in Europe

tv

The Netherlands

Sweden

UK

The Netherlands

SKO

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SKO Videodata Integration Model (NL)

- Name of JIC and project: SKO Videodata Integration Model

- Objectives:
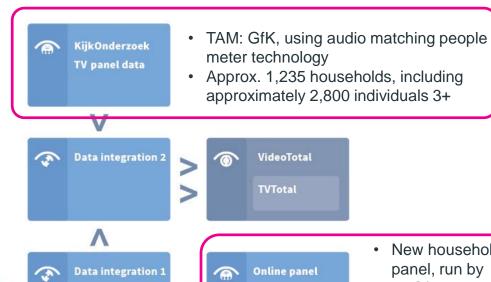
  SKO should measure and report:

  - Viewing behaviour (reach, frequency and time spent) for

  - All video content

  - All commercial video messages (pre-rolls, etc.)

  - Across any platform/device

  - All video publishers

  - With a quality level comparable to the current TAM research

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SKO Videodata Integration Model (NL)

- What differentiates this project?
  - First to market with hybrid data on programmes, then advertising, for online video
  - Reporting main FTA channels, thematic channels and some other publishers
  - Separate TAM and online panels
- The market can now see combined "total ratings" across broadcast and online

SKO Videodata Integration Model (NL)

KijkOnderzoek TV panel data
- TAM: GfK, using audio matching people meter technology
- Approx. 1,235 households, including approximately 2,800 individuals 3+

Data integration 2 → VideoTotal / TVTotal

Census data
- Online TV & Video
- Online Commercials
- Linear streaming

Data integration 1

- Content: from tags + libraries inserted into content by participating publishers
- Online commercials: using IAB VAST standard tracking pixel

Online panel Respondent data
- Profiles
- Reach

- New household-level panel, run by TNS/Kantar Media
- One panel for online behaviour across all devices
- Panellists log in for each session

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SKO Videodata Integration Model (NL)

- What's currently being reported?
  - Daily ratings for programme content viewed online (online reach and viewing behaviour per target group)
  - Reach and online GRPs per target group of online video commercials
  - Currently, reporting of television and online video remains separate, but broadcasters can analyse both types of viewing alongside each other to understand cross-platform audience characteristics

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SKO Videodata Integration Model (NL)

- New metrics that will be available:
  - Linear TV broadcast, independent of platform
  - TV time-shifted (up to 28 days)
  - Online time-shifted viewing
  - Online viewing of online advertising campaigns
  - Online viewing of online-only content (e.g. live streams of separate events at Olympics, pre-views, etc.).

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SKO Videodata Integration Model (NL)

- A change in the way performance is understood:
  - While audience shares will be less relevant in the new environment, which will have a larger number and more unstable group of participating publishers
  - Performance will probably be more measured in terms of audience reach, selectivity and time spent
- What comes next:
  - Integrating the new online database with the TV database by daily fusion
  - Deduplication and net reach for video across platforms

tv

Sweden

MMS

tv

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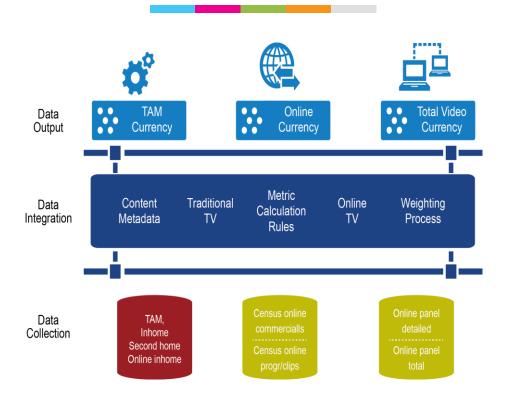# MMS Total video currency model (SE)

- Name of JIC: MMS

- Objectives:
  - Measure length of viewing duration of online video on daily basis
  - Reach per channel or website
  - Demographics of viewers of a piece of content
  - Reach and frequency (GRP) for advertising campaigns
  - Reach (rating for programmes and clips)

- Currencies:
  - Separate TAM and online currencies, Total Video currency to be available as well

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MMS Total video currency model (SE)

- What differentiates this project?
  - Separate TAM and online panels
  - Multiple panel sources used
  - One census-level measurement, for programming and content (comScore)
  - Vision to cover non-traditional TV publishers, such as YouTube, HBO Nordic, Viaplay and Netflix plus other publishers
  - One of the first in Europe to start delivering audience figures for shows watched online
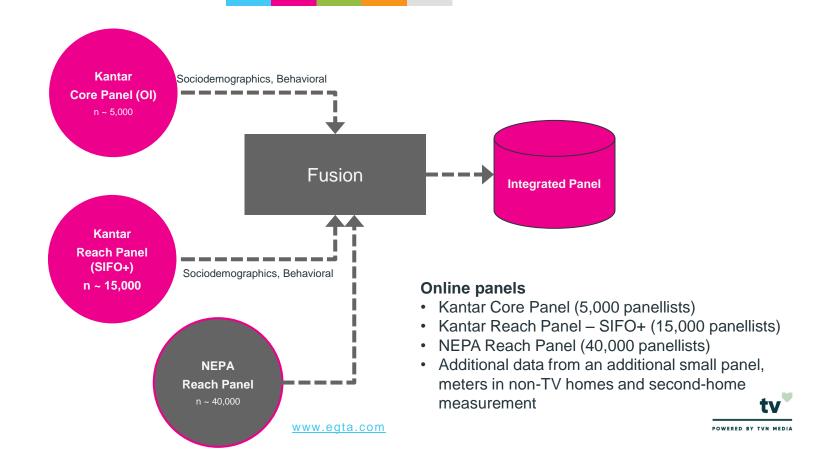 - First in world to start measuring programmatic video ads

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MMS Total video currency model (SE)

TAM:
- Carried out by Nielsen, using audio matching people meter technology
- New service to start in 2017, extended panel size to address fragmentation and problem of zero ratings

Census:
- comScore Stream Sense
- Measures "events"
- MMS calculates viewing duration
- Publishers provide metadata to identify the content

Data Output

| TAM Currency | Online Currency | Total Video Currency |

Data Integration

| Content Metadata | Traditional TV | Metric Calculation Rules | Online TV | Weighting Process |

Data Collection

TAM, Inhome Second home Online inhome

Census online commercialls / Census online progr/clips

Online panel detailed / Online panel total

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MMS Total video currency model (SE)

```
Kantar
Core Panel (OI)
n ~ 5,000
```

Sociodemographics, Behavioral

```
Kantar
Reach Panel
(SIFO+)
n ~ 15,000
```

Sociodemographics, Behavioral

```
NEPA
Reach Panel
n ~ 40,000
```

Fusion

Integrated Panel

Online panels
- Kantar Core Panel (5,000 panellists)
- Kantar Reach Panel – SIFO+ (15,000 panellists)
- NEPA Reach Panel (40,000 panellists)
- Additional data from an additional small panel, meters in non-TV homes and second-home measurement

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MMS Total video currency model (SE)

- Hybrid model roadmap

- Achieved:

  - Panels established

  - Methodology and fusion model established

  - Separate reporting from online video commercials and programmes established

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MMS Total video currency model (SE)

- Hybrid model roadmap (cont.)
- January 2017
  - First online video viewing with demographics reported (commercials)
- April 2017
  - First online video viewing with demographics reported (programmes)
- Mid summer 2017
  - First Total TV (full hybrid) reporting
- Refinement of the model following this stage

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MMS Total video currency model (SE)

- Biggest challenges to date:
  - Implementing and managing the online measurement, which is complex due to the number of different actors, devices and digital products
  - Educating publishers to help them manage their expectations about the new measurement environment

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UK

BARB

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BARB Project Dovetail (UK)

- Name of JIC and project: BARB Project Dovetail

- Objectives:
  - To develop a credible, robust and transparent measurement methodology
  - To deliver cross-device, cross-platform audience levels (both *what* and *who*)
  - Project Dovetail has mandate to show reach and frequency for TV, online, and both
  - Remit does not include a trading currency for online

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BARB Project Dovetail (UK)

- What differentiates this project?
  - Seeks to measure all TV viewing, regardless of the screen used or the means by which it is delivered
  - Single-source panel for TV and online video viewing
  - Rolled out in a series of stages, not expected to be fully operational and reporting a new currency data to the market before 2018
  - BARB is not seeking to include OTT services as part of the measurement remit, however "open for business" if OTT services want to be measured

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BARB Project Dovetail (UK)

- TAM:
  - Carried out using Kantar PeopleMeter.
  - Panel of 5,100 homes, approx. 11,500 individuals 4+
  - Uses a combination of audio matching and watermarking
  - Also leverages service information (SI) codes for Sky household from STBs
  - Live and up-to 28 days catch-up
  - Will also be able to include census data from Smart TVs (this year)

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BARB Project Dovetail (UK)

- Online video panel data:
  - Software meters (Kantar) – measure desktop/laptop/tablet viewing (but not smartphones yet)
- Census-level data:
  - Derived from metadata tags (Kantar) injected by broadcasters into their online TV media players
  - Measures viewing to the second
  - Measures number of times a device has accessed content, and length of time the content has been watched

BARB Project Dovetail (UK)

- TV Player Report (beta) report contents:
  - Aggregate on-demand and live viewing by TV player
  - Aggregate on-demand and live viewing by broadcaster group
  - Live streaming channels
  - Top 50 on-demand programmes – last week
  - Top 50 live programmes – last week
  - Top 50 on-demand programmes – last 4 weeks
  - Top 10 on-demand programmes by TV player – last week and 4 weeks
  - Top 10 live programmes by TV player – last week
  - Top 50 on-demand programmes by operating system – last week
  - Top 50 live programmes by operating system – last week
  - Top 50 on-demand programmes by operating system – last 4 weeks

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BARB Project Dovetail (UK)

Aggregate viewing by TV player (on-demand and live streaming)
Week ending 15th January 2017

		Total viewing time (minutes)			
		All platforms	**Android app**	**Apple iOS app**	**Website player**
All TV players	TOTAL	1,169,943,496	159,513,636	520,645,626	489,784,234
	Live streaming	364,663,404	45,234,123	153,845,824	165,583,457
	On-demand	805,280,092	114,279,513	366,799,803	324,200,776
All 4	Live streaming	15,494,246	1,267,831	5,233,991	8,992,424
	On-demand	92,653,276	9,328,966	39,742,775	43,581,535
BBC iPlayer (incl iPlayer Kids)	Live streaming	136,136,905	9,744,696	38,795,999	87,596,209
	On-demand	510,701,639	74,448,568	208,614,132	227,638,940
ITV Hub and STV Player	Live streaming	35,513,396	6,260,014	17,332,871	11,920,511
	On-demand	88,484,884	16,331,537	39,044,239	33,109,108
My5	On-demand	15,073,078	-	15,073,078	-
S4C	Live Streaming	32,410	-	-	32,410
Sky Go*	Live Streaming	177,486,448	27,961,583	92,482,962	57,041,903
	On-demand	94,477,940	13,401,552	62,444,302	18,632,086
UKTV Play	On-demand	3,889,274	768,890	1,881,277	1,239,107

* The viewing time given for Sky Go includes viewing to other broadcasters. See the Sky Go column on page 6 for the detailed breakdown.

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BARB Project Dovetail (UK)

Aggregate viewing by broadcaster group
Week ending 15th January 2017

LEGEND:
A = Android app,
I = iOS app,
W = Website player

	Total viewing time (minutes)									
	All viewing			**Own apps**			**Sky Go (A, I, W)**		**BBC iPlayer (A, I, W)**	
	Total	On-demand	Live streaming	On-demand		Live streaming		On-demand	Live streaming	On-demand	Live streaming
TOTAL	1,169,943,496	805,280,092	364,663,404	200,100,512		51,040,052		94,477,940	177,486,448	510,701,639	136,136,905
BBC	647,169,484	511,077,047	136,092,437	-		-		375,408	-	510,701,639	136,092,437
Sky	178,696,110	59,815,731	118,880,380	-		-		59,815,731	118,880,380	-	-
ITV	144,292,044	97,185,020	47,107,024	88,484,884	A, I, W	35,513,396	A, I, W	8,700,135	11,593,629	-	-
Channel 4	119,477,338	95,161,511	24,315,826	92,653,276	A, I, W	15,494,246	A, I, W	2,508,235	8,821,580	-	-
Channel 5	25,966,313	18,624,526	7,341,787	15,073,078	I	-		3,551,448	7,341,787	-	-
UKTV	12,113,831	5,316,817	6,797,014	3,889,274	A, I, W	-		1,427,544	6,797,014	-	-
Viacom	11,961,159	7,094,885	4,866,274	-		-		7,094,885	4,866,274	-	-
Fox	6,772,996	1,296,262	5,476,735	-		-		1,296,262	5,476,735	-	-
Disney	6,554,687	6,057,144	497,542	-		-		6,057,144	497,542	-	-
Discovery	5,570,172	1,269,660	4,300,512	-		-		1,269,660	4,300,512	-	-
NBC Universal	4,341,719	702,759	3,638,960	-		-		702,759	3,638,960	-	-
AETN	4,273,178	365,010	3,908,168	-		-		365,010	3,908,168	-	-
Turner	1,723,216	1,214,541	508,674	-		-		1,214,541	508,674	-	-
Star India	855,193	-	855,193	-		-		-	855,193	-	-
Vice UK TV Ltd	96,768	96,768	-	-		-		96,768	-	-	-
S4C	76,878	-	76,878	-		32,410	W	-	-	-	44,468
UTV Ent't TV	22	22	-	-		-		22	-	-	-
Not Attributable	2,390	2,390	-	-		-		2,390	-	-	-

Note: All totals are rounded to the nearest whole minute.

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BARB Project Dovetail (UK)

- Hybrid model roadmap

- Achieved:
  - Comparable metrics for online and offline programme viewing defined
    - Average programme streams (analogous to *average audience* in TV)
    - Average ad streams (analogous to *TVRs* in TV)
  - TV player report now being published (on demand and live-streamed)
    - Reflects devices, rather than audiences
    - Not all broadcasters' player versions are included

BARB Project Dovetail (UK)

- Hybrid model roadmap (cont.)

- Ongoing:
  - Prototype fusion models have been tested, a contract is to be concluded shortly
  - Invitation to tender for Dovetail Boost panel

- Final phase:
  - Integrating the census and panel data sets to provide a new gold standard for the industry

BARB Project Dovetail (UK)

- Challenges:
  - Proliferation of devices, players and operating systems places significant burden on broadcasters
  - Exacerbated by frequent software updates
  - Acquiring STB data from all platform operators
  - Preparing for the General Data Protection Regulations (GDPR)

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resources

egta resources

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