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ADVANCES IN HYBRID TV AUDIENCE MEASUREMENT

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How GfK unlocks value from audience measurement and provides valuable insights to the players in the media ecosystem who need to understand TV and media consumption patterns? GfK firmly believes that one size does not fit all, which is why multiple solutions have been developed.

Approach to hybrid measurement

The aim of our measurement is to follow the user on all devices for a 360-degree understanding of viewing consumption. To deliver it, we have developed a modular approach that measures viewing behaviour across all devices reported in our panels. All these measurements are combined in our central One Media Platform, enriched and, if necessary, supplemented with census data and/or third-party data.

TV data collected via audio tracking is melded with digital data from an in-home router measurement and/or digital on-device measurement and with digital video census data sets. In an ideal scenario, this happens in a single source panel, but we have also developed fusion approaches to deliver integrated total video ratings based on a hybrid panel approach.

To include the growing longtail, we have developed methods to generate viewing insights based on qualified census data and/or return path data to enrich our panels.

All these solutions are modular so we can guarantee a high-quality currency measurement for total video ratings for each market adjusted to the local conditions and needs.

Different approaches

We use different approaches ranging from the traditional - where one research agency wins the tender and collects, processes and reports all the data - to the scenario where an agency provides some of the data; and finally, to where we only connect the data. GfK has extensive experience across the entire spectrum (see figure 04).

Key to all of our contracts are common principles: transparency of methodology, flexibility in approach and thinking, and adaptability to create a solution that works for each unique market. This increasingly means collaboration with other research agencies, data providers and other third-parties, an approach that has worked well for us.

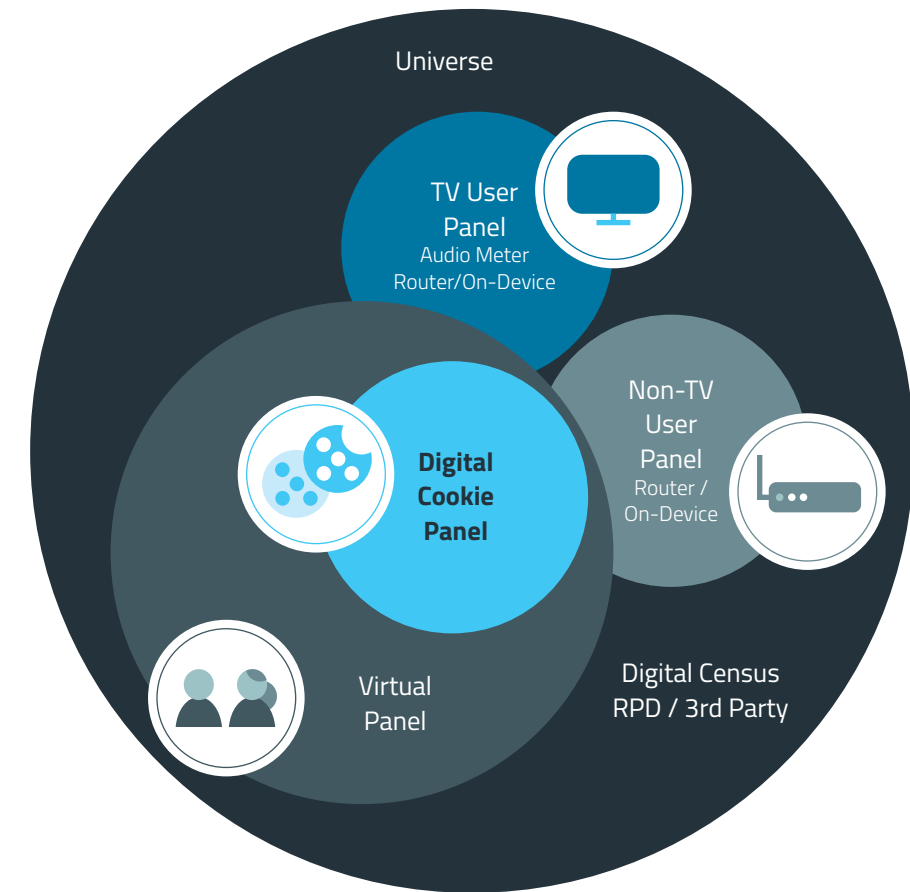
Data integration

In instances where we do not own any of the data, there are a number of agencies collaborating in a data integration approach. We start with a TV measurement panel that covers content and ads, then we add census measurement that covers all devices and big screens. The next ingredient is an online panel with cross-device measurement. And finally, we integrate all these data assets with the help of advanced data science techniques.

We use this approach, for example, in our data integration project in Sweden, where three research agencies provide data assets and GfK performs the data integration work to deliver an integrated streaming and linear audience reporting. The interesting aspect of this approach is that the TV and online panels are completely independent. During the first step, we expand the online panel with virtual panellists from census data applying data science solutions, and in the second stage, we fuse the linear and the virtual panel data. The outcome is the integrated dataset that includes both linear and streaming usage.

In instances where we provide part of the data, for example TAM in Germany, we work with third parties who provide the online panel to complement our cross-media panel, as well as the German JIC AGF and

FIGURE 03: HYBRID PANEL APPROACH



Source: © GfK 2020

online platforms. In this scenario, one of our key skills comes into play - data integration - to capture the digital viewing of TV and video.

Bringing a fully integrated audience measurement solution to Singapore

GfK has run a full audience measurement solution in Singapore - SG-TAM - for Singapore's Infocomm Media Development Authority (IMDA) since 2016. Acting as a total video currency, it combines live TV viewing, catch-up TV and streaming TV content to deliver fully integrated, deduplicated video ratings. The advantage in Singapore is that we have a single-source element in our panel.

GfK delivers integrated linear and non-linear TV audience figures - regardless of the device used for

viewing - and reports using standard metrics. That includes:

- Live viewing.
- Catch up for up to 28 days on 200+ channels.
- Streaming TV content on partner broadcaster players.

Although traditional live TV viewing still dominates in Singapore, streaming services are growing in popularity. These are tracked using a dedicated digital panel with passive meters on smartphones, tablets and PCs (see figure 05 for an illustration of the SG-TAM panel setup).

As more viewers choose to watch online, one key objective is to track trends in live TV viewing, and to understand if viewers are migrating online for the same content.

This form of cross-media measurement for video specifically is attracting a lot of industry attention at present. Much of it is focused on the WFA global initiative, announced in December 2019, which aims to set standards for cross-media measurement and to unlock its potential for the entire media ecosystem.

For our part, we can show if that same content is attracting new online viewers when streamed, and if so, evaluate the incremental reach – including analysing who is viewing via streamed video content. We are also able to assess the types of audiences that view on the different platforms.

This means we can answer some of our clients' key questions such as:

- How often do people use their smartphones while watching TV?
- When are they doing this?
- Are there differences in the population in terms of this activity?

Beyond Video...Total Media Measurement

Ultimately, we aim for a comprehensive Total Media Measurement where we track analogue and digital consumption viewing, listening and reading – online and offline. Then we add consumers' interests,

product use, advertising attention and more for all domains measured through our consumer surveys. To this we add the holy grail of actual sales data, directly linking media consumption with purchase behaviour. This approach supports the growth of media businesses by providing a stable transition of the existing media currencies into a smart, relevant and trusted cross-media solution.

We combine panel and census measurement using our Audience Ascription Modelling (AAM). AAM provides a dataset for analysis and reporting large enough to cover any digital use by integrating census and panel data – but importantly, it also retains the special value of each dataset in the final output. That is, keeping both the in-depth information about the profiles from the panel as well as having reliable information on the longtail by closing any panel measurement gaps through using the huge numbers of the census measurement. The enriched cookies from the census data can flow back into programmatic systems to optimize targeting processes.

In other words, we put digital first and combine our state-of-the-art media audience measurement with an open platform ready for integration with external data sources and systems.

FIGURE 04: ONE SIZE DOESN'T FIT ALL

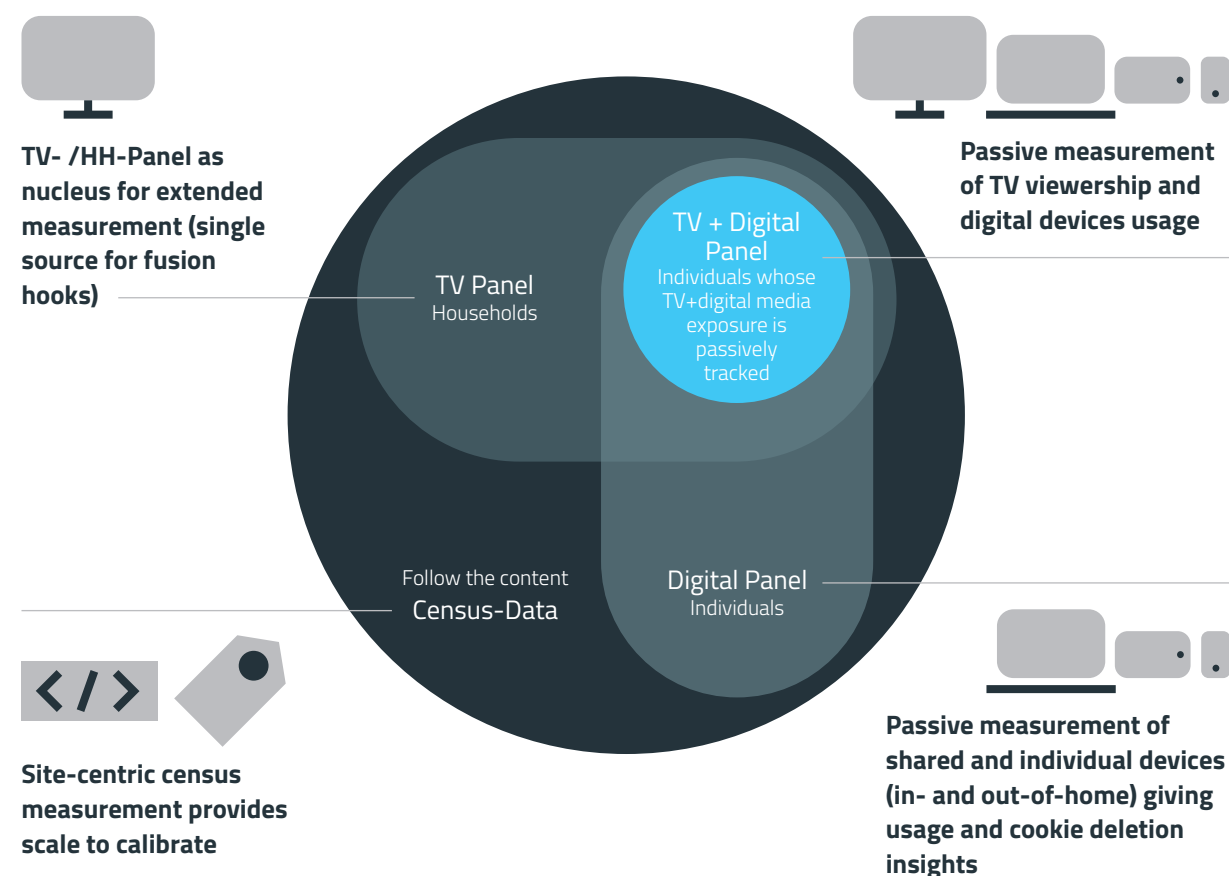


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Conclusion

We want to embrace differences in approaches while recognising commonality and have a collaborative mindset to give the users of the data what they want – a single, integrated system for planning and buying – and one that can handle programmatic data. At GfK, this is our key focus for the future of audience measurement, and we are building technology platforms to deliver not only integrated video and digital data, but which are also prepared for a future where all media data – TV, radio, digital, print media – will come together.

FIGURE 05: SG-TAM: THE PANEL



Source: © GfK 2020

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