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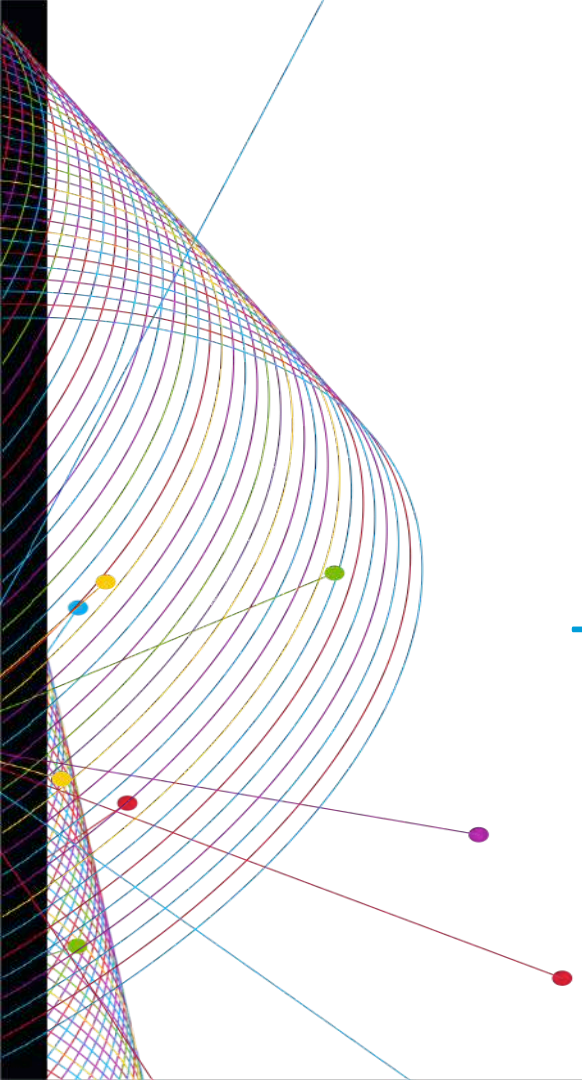
nielsen

CROSS-PLATFORM RATINGS: BRIDGING THE DIGITAL DIVIDE

NIELSEN TOTAL AUDIENCE MEASUREMENT-MEASURING WHAT NO ONE ELSE CAN… TODAY AND TOMORROW

Jay Nielsen, VP Product Leadership
Kelly Abcarian, SVP Product Leadership



WHY TOTAL AUDIENCE?
THE CHANGING MEDIA LANDSCAPE

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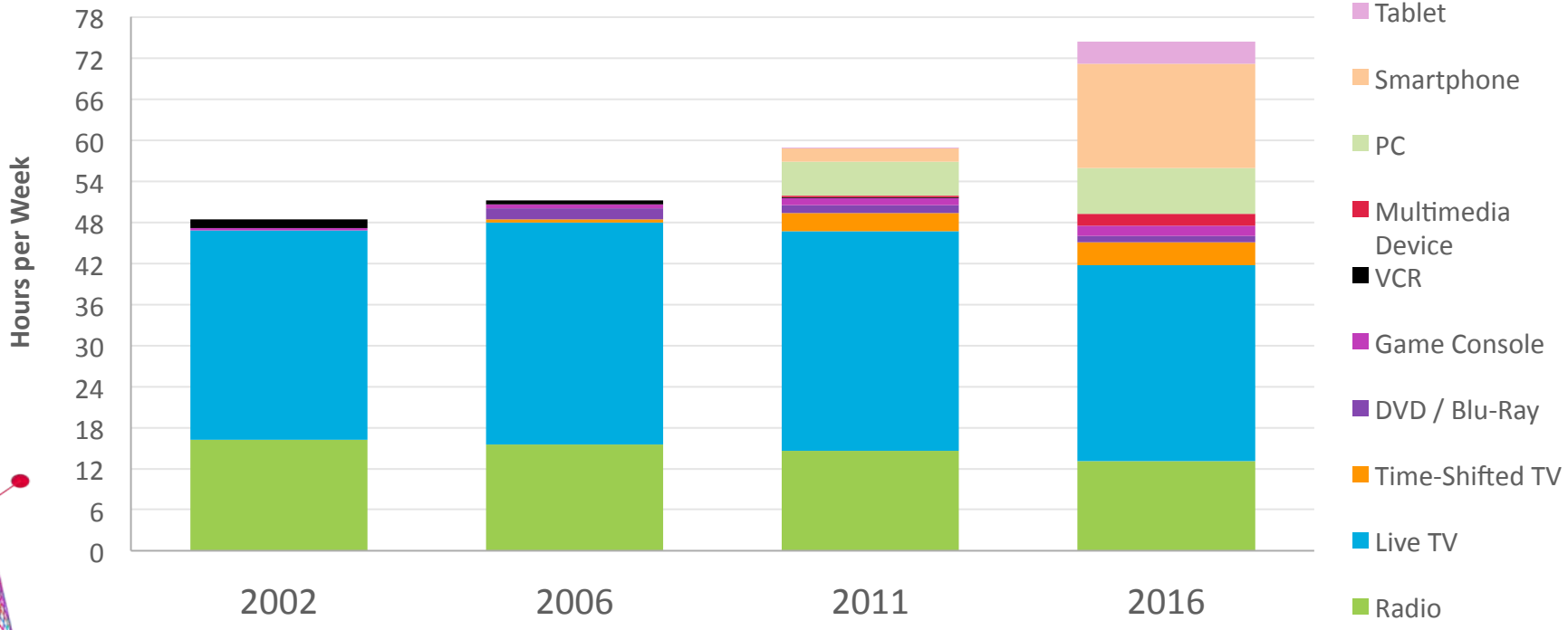
THERE ARE MORE MEDIA OPTIONS FILLING UP A CONSUMER'S DAY

Weekly Time Spent in the Total US Population – Based on Qtr 3, **P18+**



Source: Nielsen Total Audience Report and Audience Insights Analysis

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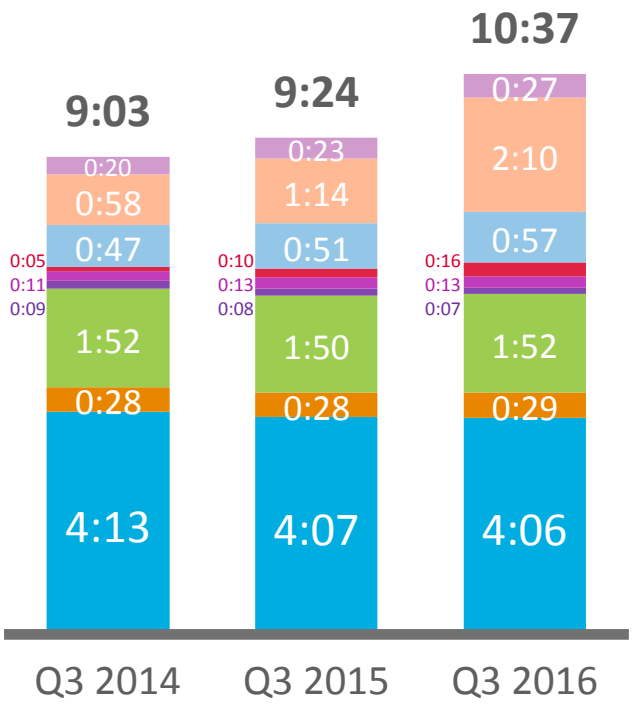
CHANGING MEDIA USAGE

Average Time Spent per Adult per Day



	2015-16 Diff	2015-16 Diff%
TOTAL	**1:13**	**+13%**
Tablet (App/Web)	0:04	+17%
Smartphone (App/Web)	0:56	+76%
Internet on PC	0:06	+12%
Multimedia Device	0:06	+60%
Videogame Console	0:00	0%
DVD	(0:01)	-13%
AM/FM Radio	0:02	+2%
Time-Shifted TV (DVR)	0:01	+4%
Live TV	(0:01)	0%

Source: Nielsen Total Audience Report Q3 2016

TV VIEWING REMAINS NEAR HISTORIC HIGH LEVELS

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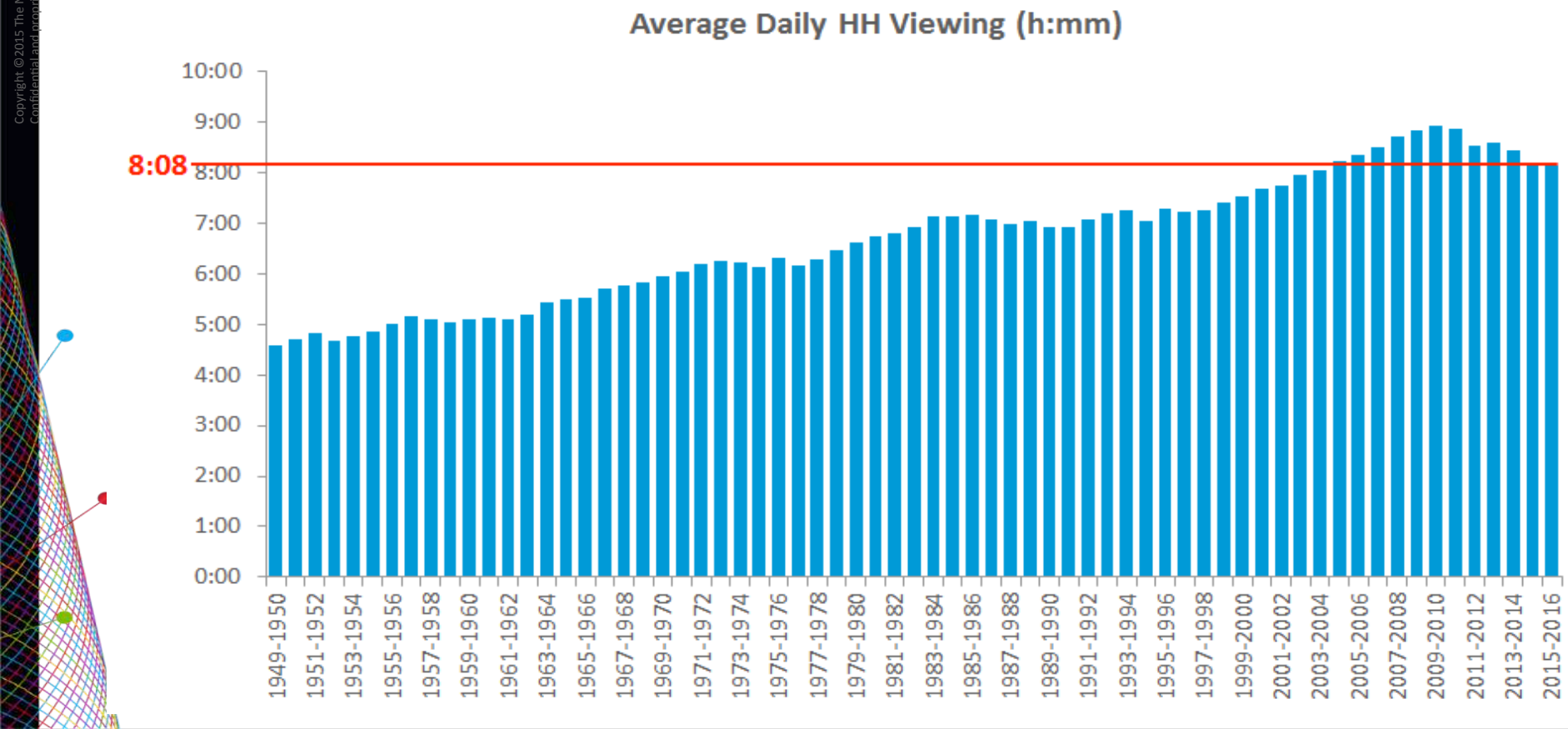

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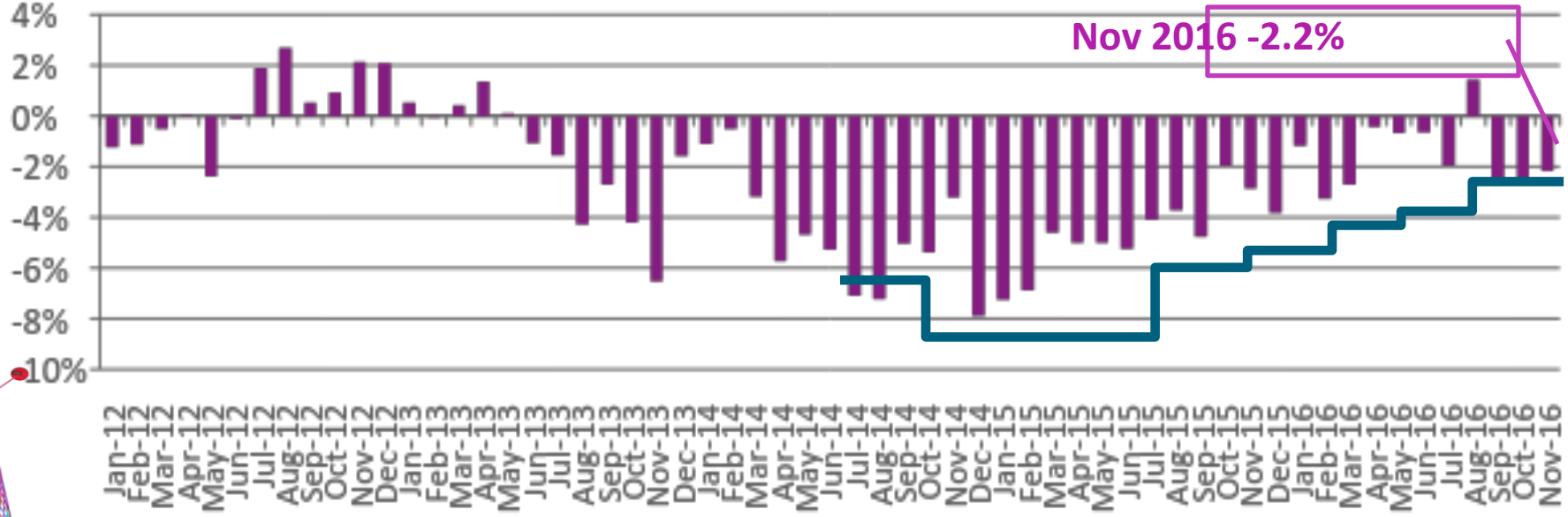
DECLINE IN TRADITIONAL TV (PUT LEVELS)

Current trend worst in Summer 2014 but is looking better in the 2016-17 season

Difference in P25-54 PUT (Total Day)

Year over Year Percent Change



Source: Nielsen NPOWER Jan 2012-Sept 2016 US TV HH (incl BBO)

AMERICANS ARE WATCHING LESS LIVE TELEVISION

Total Day: Persons Using Television (Live)

Year over Year Percent Change

	P2-11	P12-17	P18-34	P35-49	P50-64	P65+
2008 *vs 2007*	-1%	0%	2%	2%	2%	2%
2009 *vs 2008*	1%	-2%	-2%	-1%	0%	1%
2010 *vs 2009*	3%	1%	-1%	-1%	0%	-1%
2011 *vs 2010*	-1%	-4%	-4%	-1%	1%	1%
2012 *vs 2011*	-3%	-4%	-4%	-1%	0%	1%
2013 *vs 2012*	-1%	-5%	-4%	-4%	0%	2%
2014 *vs 2013*	-8%	-10%	-10%	-5%	-3%	-1%
2015 *vs 2014*	-6%	-14%	-10%	-4%	-1%	0%
9 Months 2016 *vs 9 Months 2015*	-7%	-12%	-5%	-1%	1%	1%

- Source: Nielsen NPOWER, M-SU/6AM-6AM Jan-Dec by year
- HUT/PUT minus DVR Playback – dual feed

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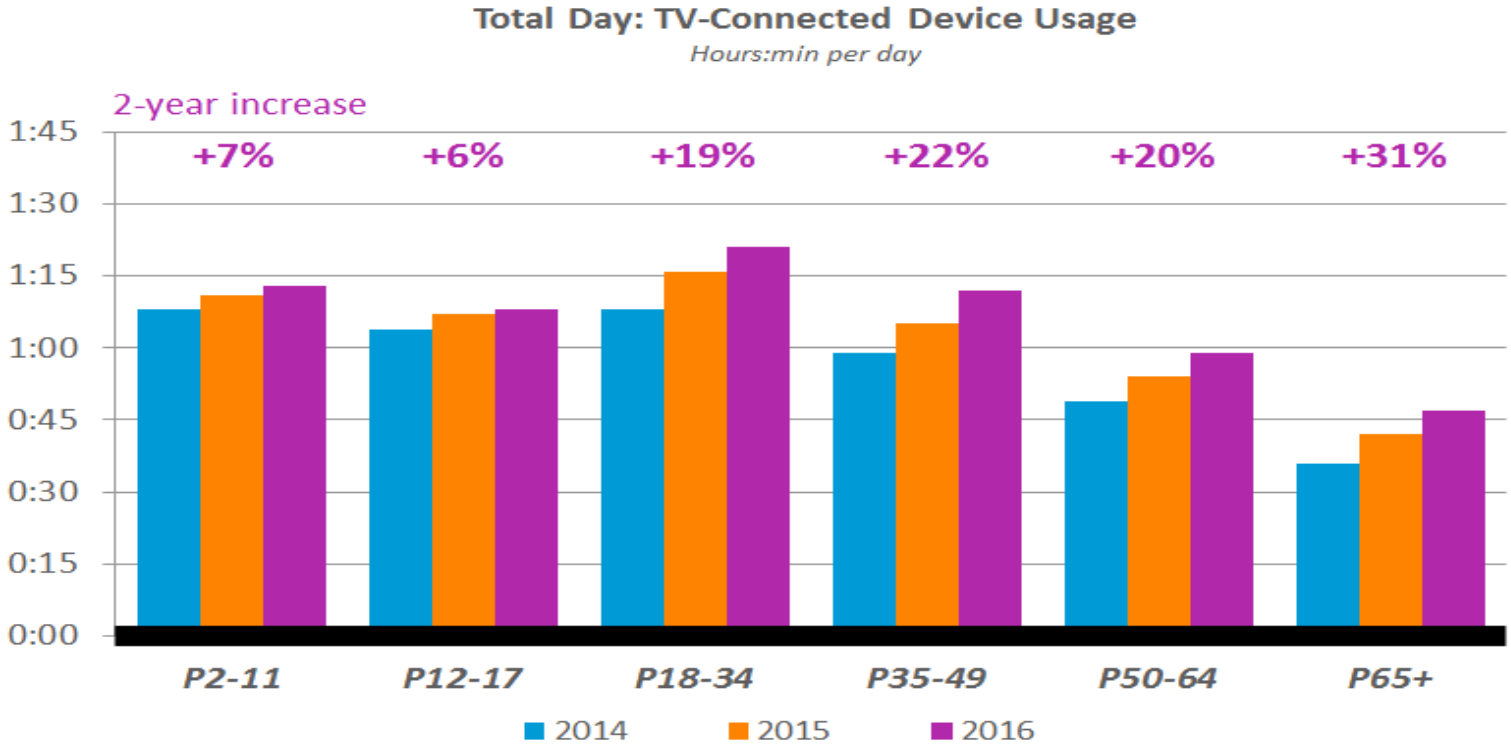
CONTINUED INCREASE IN DEVICE USAGE



Source: Nielsen NPOWER for dates indicated (Season to Date: Oct14/15/16 – Sept14/15/16)
TV-Connected Devices = DVR Playback, Videogame Console, Internet-Connected Devices, Audio-Video, DVD Playback, VCR Playback

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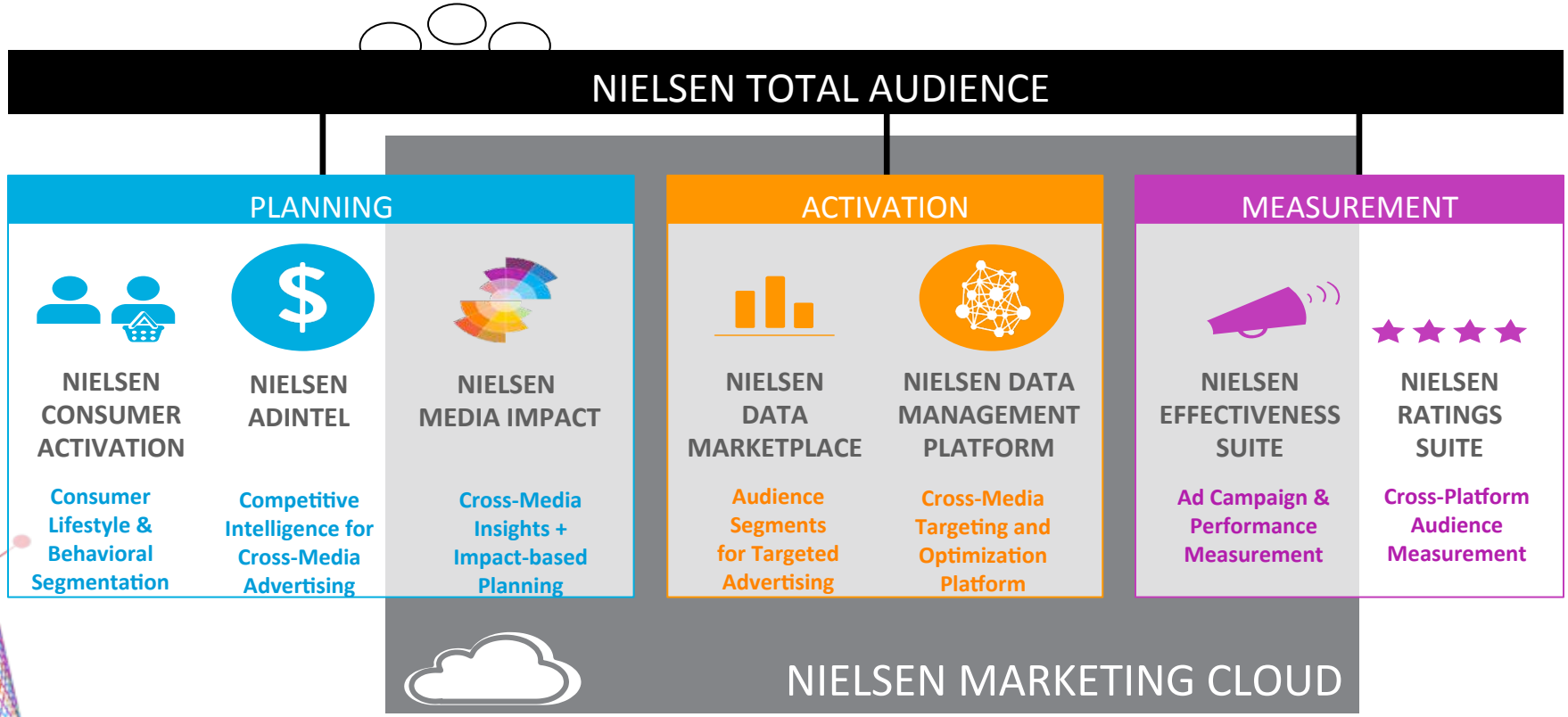
SUMMARY

- Landscape continues to change from a **Live** to an **On Demand** environment
- Overall **media minutes growing** - Traditional TV viewing decreasing while TV-connected device usage increasing
- Changes in TV viewing part of **a larger consumer trend** – not just TV-connected devices but also smartphones, tablets

NIELSEN TOTAL AUDIENCE FRAMEWORK



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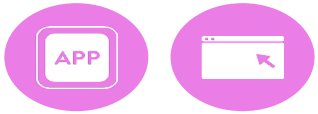
NIELSEN TOTAL AUDIENCE RATINGS CORE PRINCIPLES

Measurement of Consumer Media Exposure Across Platforms



Comparable Measurement

Measurement of Ads and Content Separately

Total Content Ratings

Total Ad Ratings

Ratings for Video, Audio, and Text

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EXTENSIVE VIEW OF AD AND CONTENT CONSUMPTION

NIELSEN RATINGS SUITE

TOTAL CONTENT RATINGS	TOTAL AD RATINGS
Linear TV Ratings (Program Minutes) *Digital in TV Ratings (Program Minutes)* *Digital Content Ratings* *VOD Content Ratings*	*Linear TV Ratings (Commercial Minutes)* *Digital Ad Ratings* *Linear VOD & Connected Devices*
WHO IS CONSUMING MY CONTENT AND ON WHAT DEVICES, AND HOW DOES THIS COMPARE TO MY COMPETITION?	WHO SAW AN AD ON MY PLATFORM AND HOW DOES THIS COMPARE TO THE CAMPAIGN AVERAGE?

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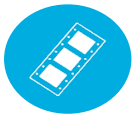
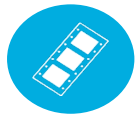
A COMPARISON OF RATINGS

	Digital Content Ratings		Total Content Ratings
	digital content with dynamic ads or no ads	COMPREHENSIVE MEASUREMENT OF	*all video content across all ad loads*
	 VIDEO STATIC	CONTENT TYPES	 VIDEO
		PLATFORMS	
	• *granular digital detail providing unprecedented understanding of performance* • *syndicated marketplace view*	KEY USE CASES	• *true cross-platform measurement to evaluate performance from a granular or birds-eye view* • *syndicated marketplace view*

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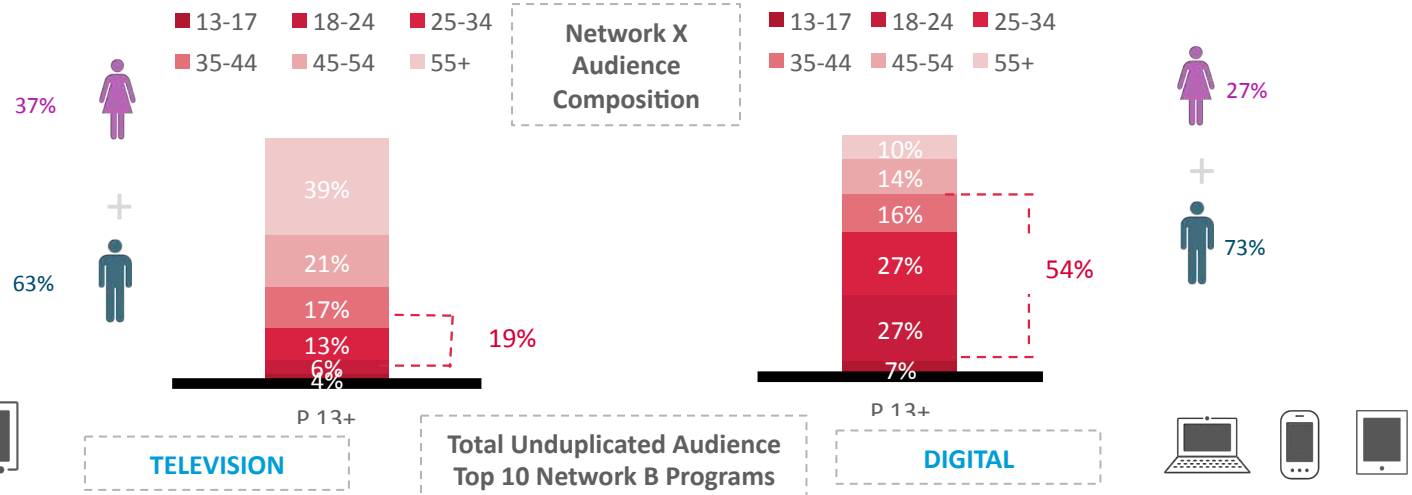
AUDIENCE COMP. + PROGRAM PREFERENCE VARIES BY PLATFORM

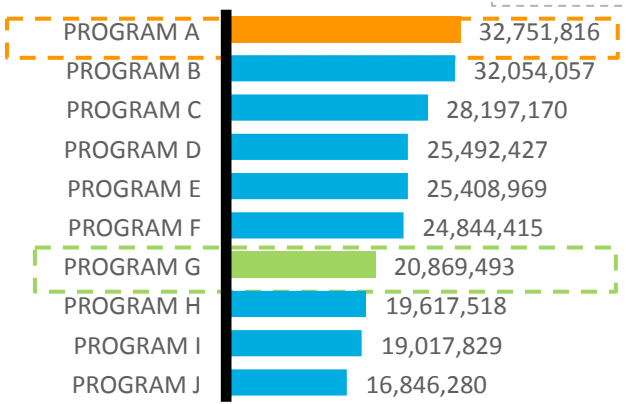
Over 50% of the digital audience of Network X during the month of January is between **18 and 34 years**

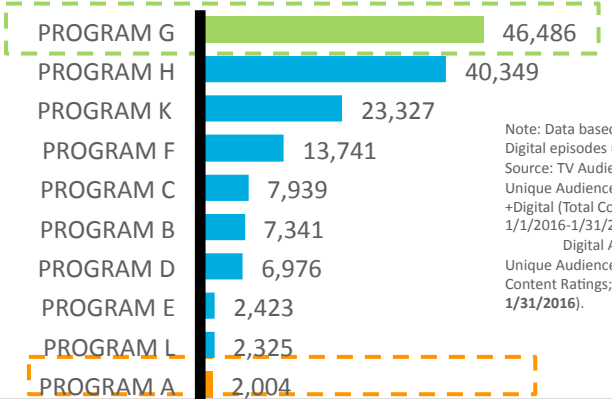


TELEVISION

Total Unduplicated Audience Top 10 Network B Programs

DIGITAL





Note: Data based on P13+. # of TV episodes = 7; # of Digital episodes = 5
Source: TV Audience Profile reflects Total Content Unique Audience: TV Only (Live TV + VOD + DVR) + TV +Digital (Total Content Ratings; Monthly; 1/1/2016-1/31/2016)
Digital Audience Profile reflects Total Digital Unique Audience (Computers & Mobile) (Digital Content Ratings; Monthly-Tagged; **1/1/2016 – 1/31/2016**).

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LONG FORM AND SHORT FORM CONTENT IS CONSUMED DIFFERENTLY ON DIGITAL DEVICES

Over **one-third** of the total long-form video views are attributed to A18-24, while A25-34 account for the most short-form video views. There is a higher incidence of audience duplication across Digital devices for short-form video content.

PROGRAM A

Long-Form Video

Distribution of Total Video Views	
13-17	8%
18-24	**35%**
25-34	28%
35-44	12%
45-54	10%
55+	6%

Distribution of Total Unique Audience		
Computer Only	Mobile Only	Computer + Mobile
48.6%	51.0%	0.4%

PROGRAM A+

Short-Form Video

Distribution of Total Video Views	
13-17	5%
18-24	19%
25-34	**24%**
35-44	21%
45-54	17%
55+	13%

Distribution of Total Unique Audience		
Computer Only	Mobile Only	Computer + Mobile
53.0%	44.0%	**3.0%**

Note: Data based on P13+. Computer Only = exposed to content on browser only; Mobile Only = exposed to content on a mobile/tablet browser or certified app
Source: Digital Audience Profile reflects Total Digital Unique Audience (Computers & Mobile) (Digital Content Ratings; Monthly-Tagged; 1/1/2016 – 1/31/2016).

DATA INCLUDED IN TOTAL CONTENT RATINGS

Live, DVR, recently telecast VOD, including mobile app and computer viewing (with linear ad loads)

Television viewing from DVRs: Days 8-35 ***new!***

VOD, SVOD and other OTT content hitting the TV screen ***new expanded capability!***

Digital content on mobile devices and computers as measured by Digital Content Ratings (DCR) ***new!***

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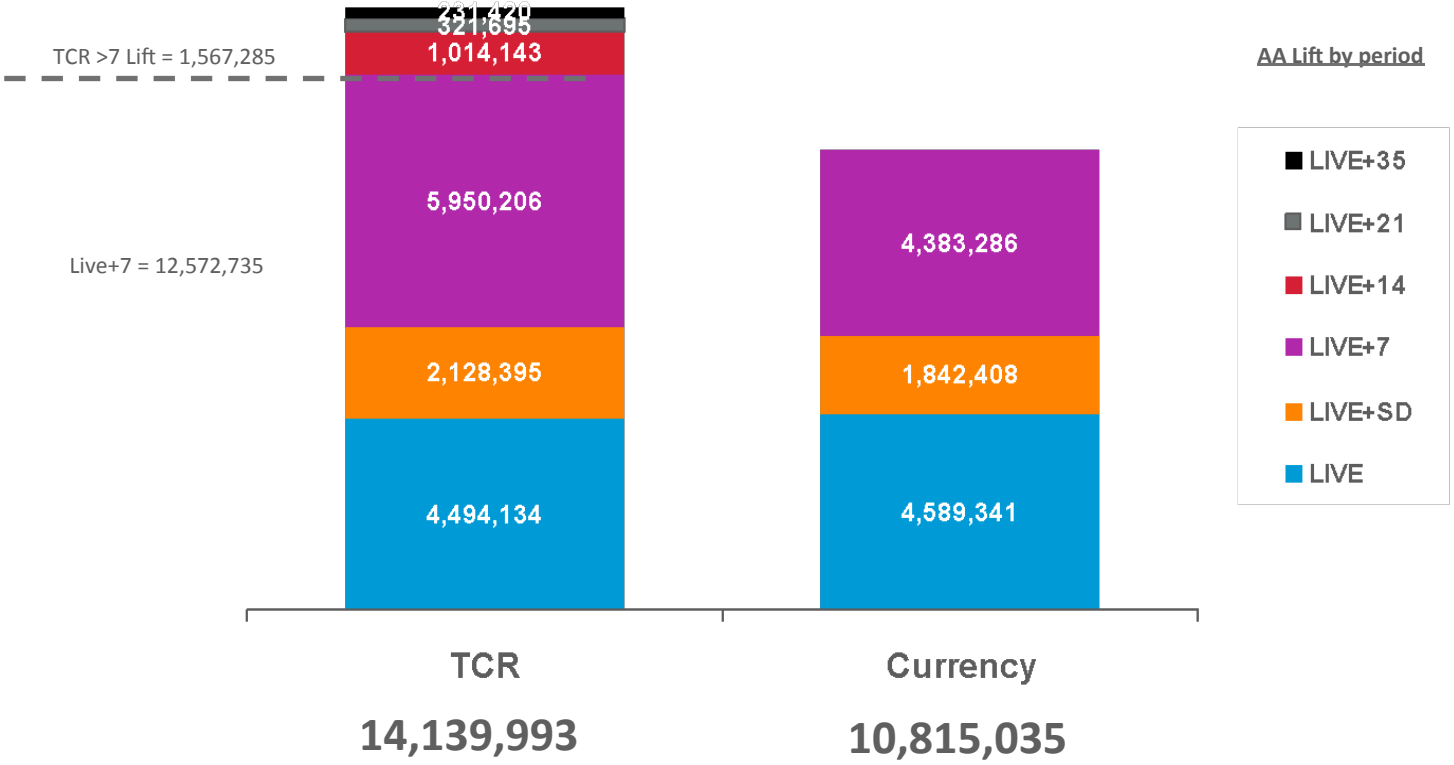
TOTAL CONTENT RATINGS VS. CURRENCY

Average Audience Comparison, Scripted Broadcast Prime Program, P2+



Source: Currency data pulled in NPower, Live Only, Playback within 7 days – Linear, and Playback within 7 days – VOD Only
TCR data pulled in Nielsen Content Ratings

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HOW WILL THIS NEW DATA WORK FOR YOU?

ANALYZE

- compare TV and Digital with a ***CONSISTENT*** set of metrics
- one ***DEDUPLICATED AUDIENCE*** number across all platforms
- harmonized ***REPORTING*** with a single user interface

DIFFERENTIATE

- content owners can see how they stack up against the ***COMPETITION***
- agencies can ***COMPARE*** content owner performance with ease
- Close the loop between planning and measurement with syndicated data eventually flowing into ***NIELSEN MEDIA IMPACT***

EXECUTE

- alignment between content and ad measurement methodologies and metrics allows efficient ***CROSS-MEDIA PLANNING***

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TOTAL AUDIENCE
IMPORTANCE OF COMPARABLE METRICS

COMPARABLE METRICS IN NIELSEN CONTENT RATINGS

HOW MANY

UNIQUE AUDIENCE (REACH)

HOW OFTEN

FREQUENCY

HOW LONG

TIME SPENT VIEWING

+ AVERAGE AUDIENCE

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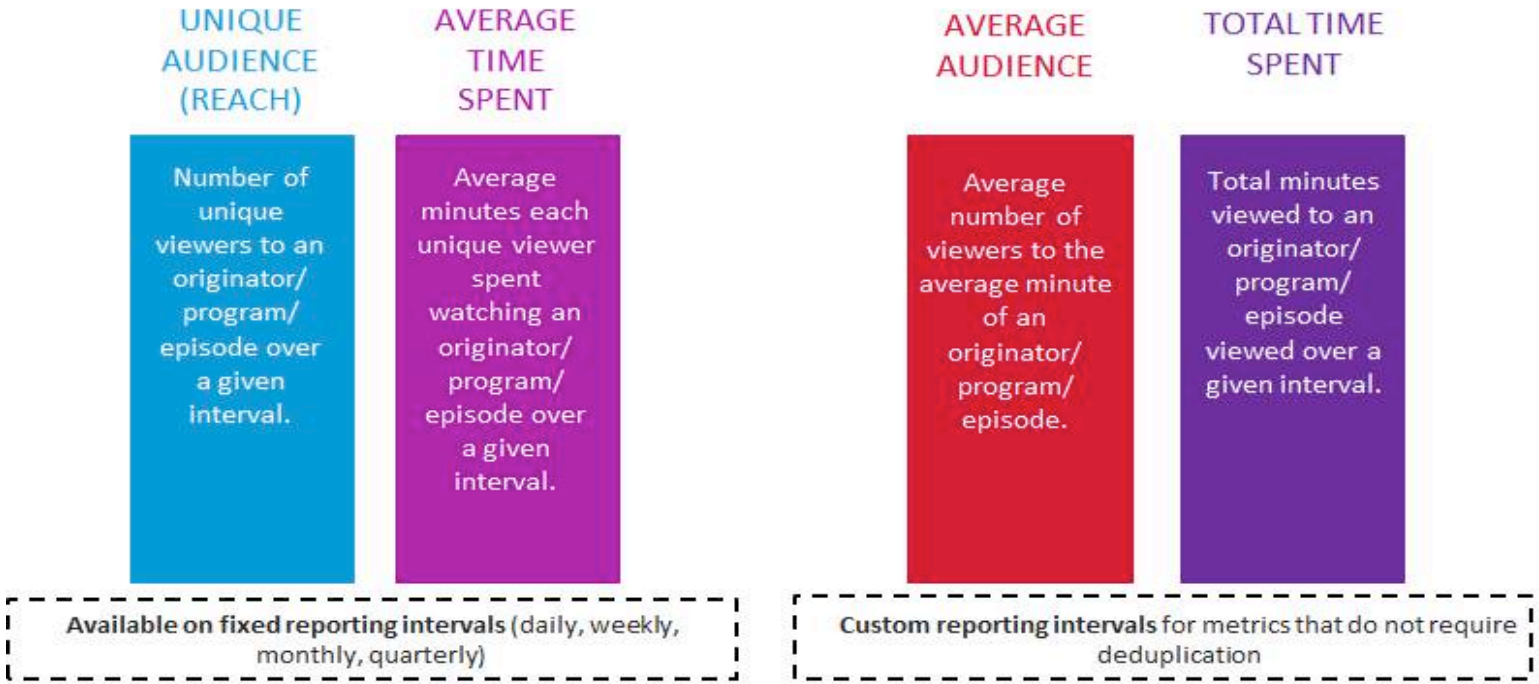
CONTENT RATINGS METRICS ACROSS VIDEO + TEXT

Total Content Ratings allows you to understand the audience for an originator, program or episode across a specific time period with metrics comparable to Nielsen TV Ratings.



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TOTAL CONTENT RATINGS AND TV RATINGS

Changes from TV Ratings required to bring comparability to the metrics

FEATURE	LINEAR TV RATINGS	TOTAL AUDIENCE
Reporting Level	Telecast-level reporting	Episode-level reporting
Program Only Ratings	Rating includes both program and commercial minutes	Rating includes program minutes only
Ad Model	Only includes viewing where the full linear ad load is served	Includes all viewing regardless of ad load
Universe	US TV Households	Total US Population
Time Shifted Viewing	Time shifted viewing is credited to the day of live air	Time shifted viewing is credited to the day of view

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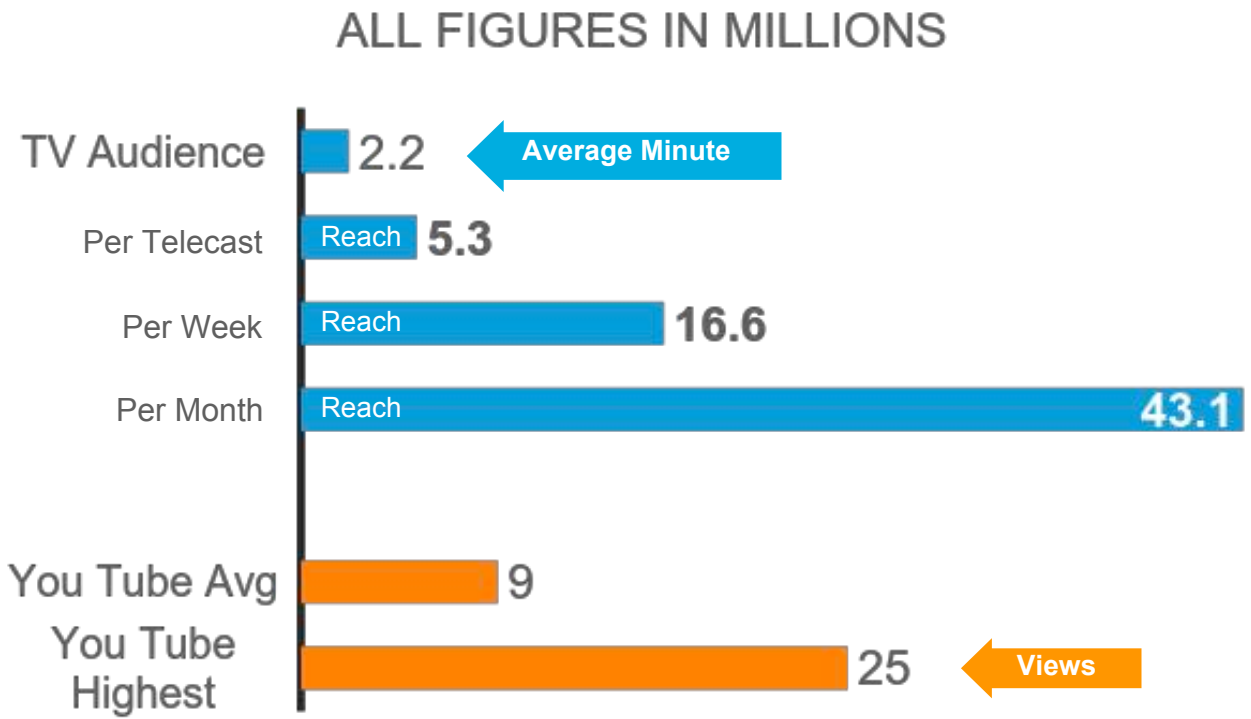
METRICS THAT AREN'T COMPARABLE

Jimmy Kimmel example – Reported audience for May 2015



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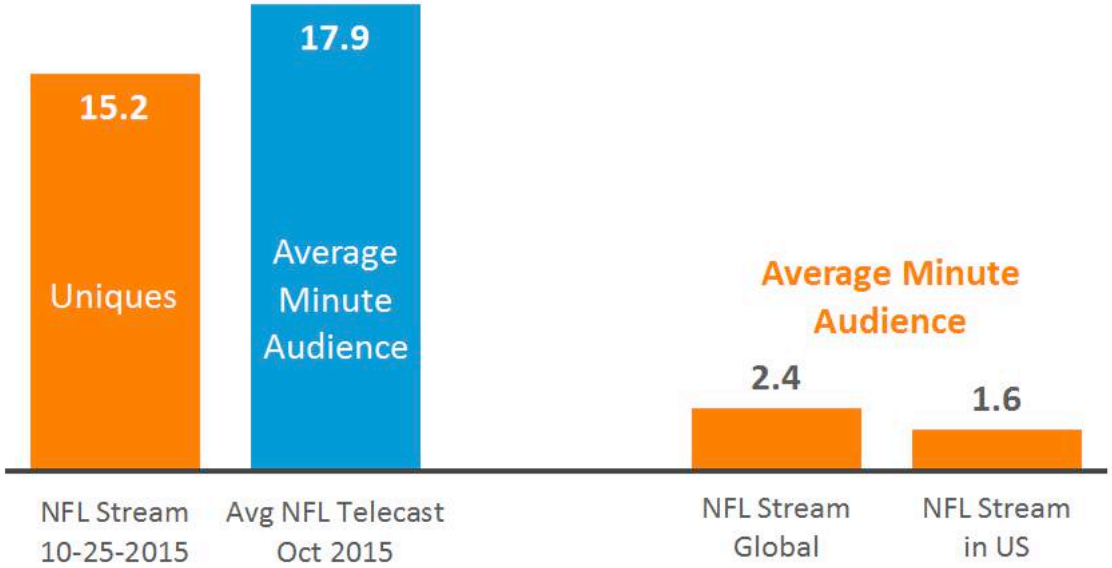
METRICS THAT AREN'T COMPARABLE

NFL live stream game, 10/25/2015 (audience in millions)



Source: Wall Street Journal 10/26/2015 (NPOWER for NFL Oct 2015 Persons 2+ L+SD Average Audience)

Source: Wall Street Journal 10/26/2015 (NPOWER for NFL Oct 2015 Persons 2+ L+SD Average Audience)

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PLANNING WITH IMPACT

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Beauty brand

Target: Women 25-54

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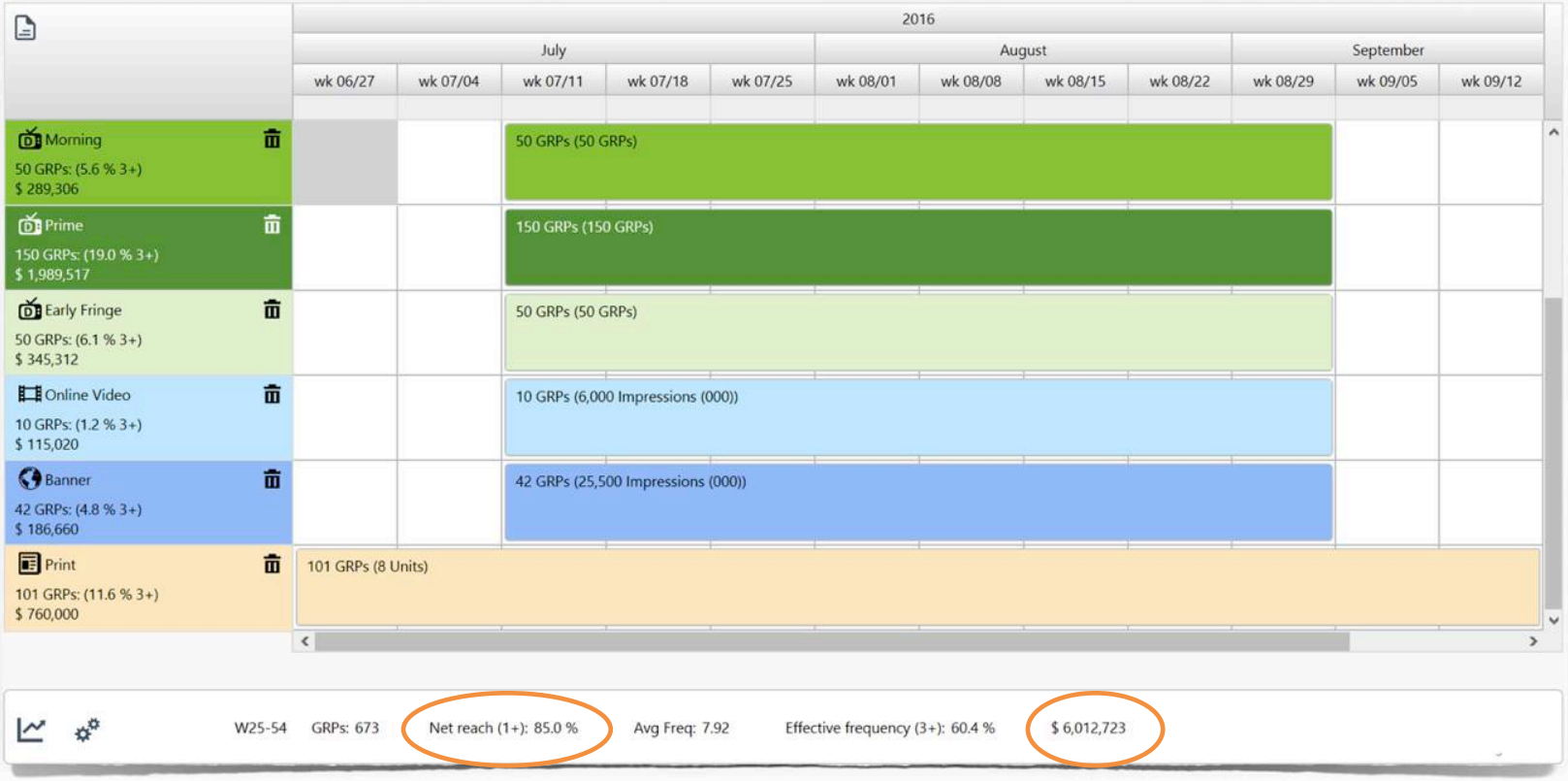
INITIAL PLAN – 85.0% REACH FOR W 25-54



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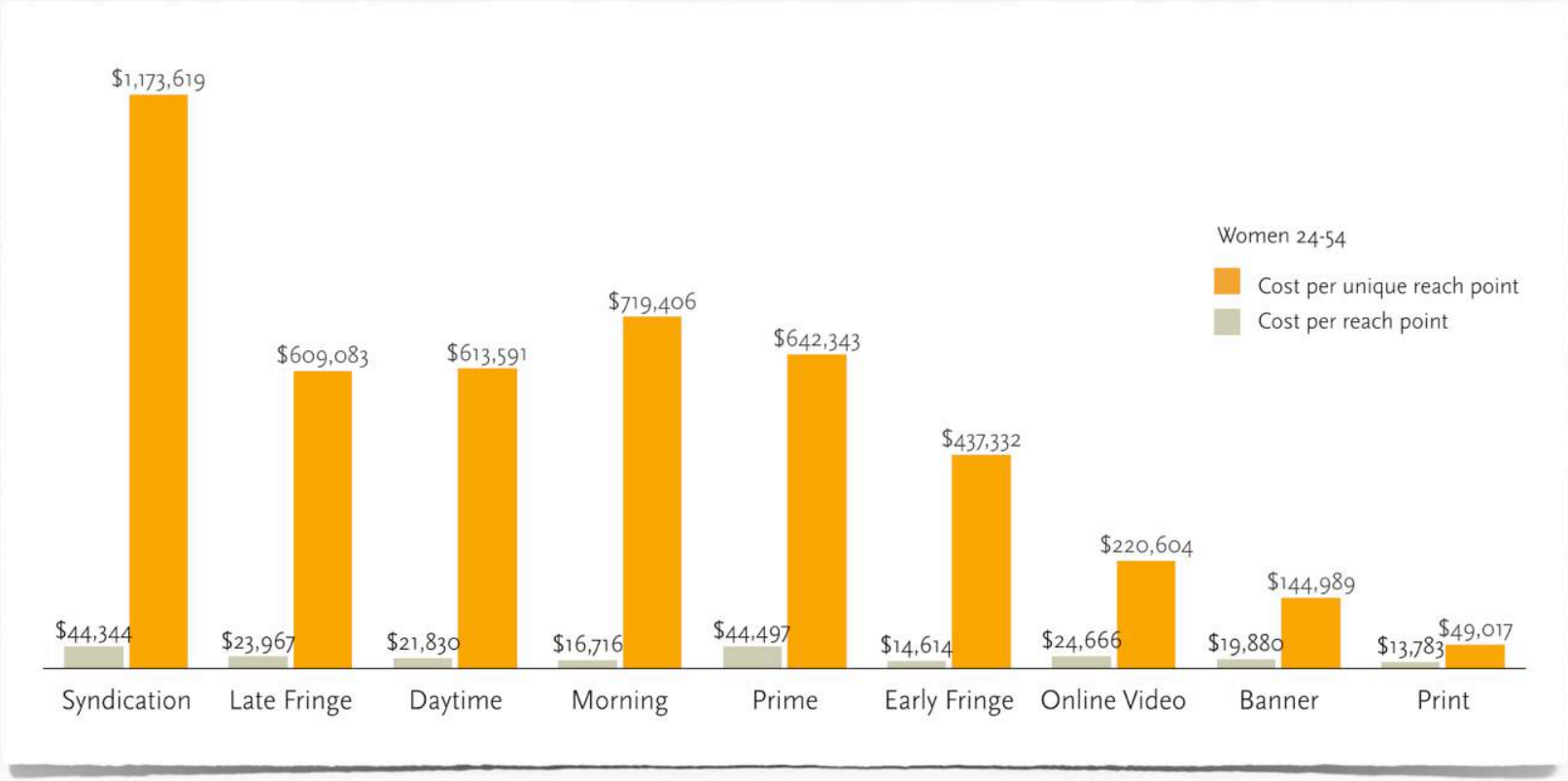
OPPORTUNITY TO INCREASE REACH AT REDUCED COST



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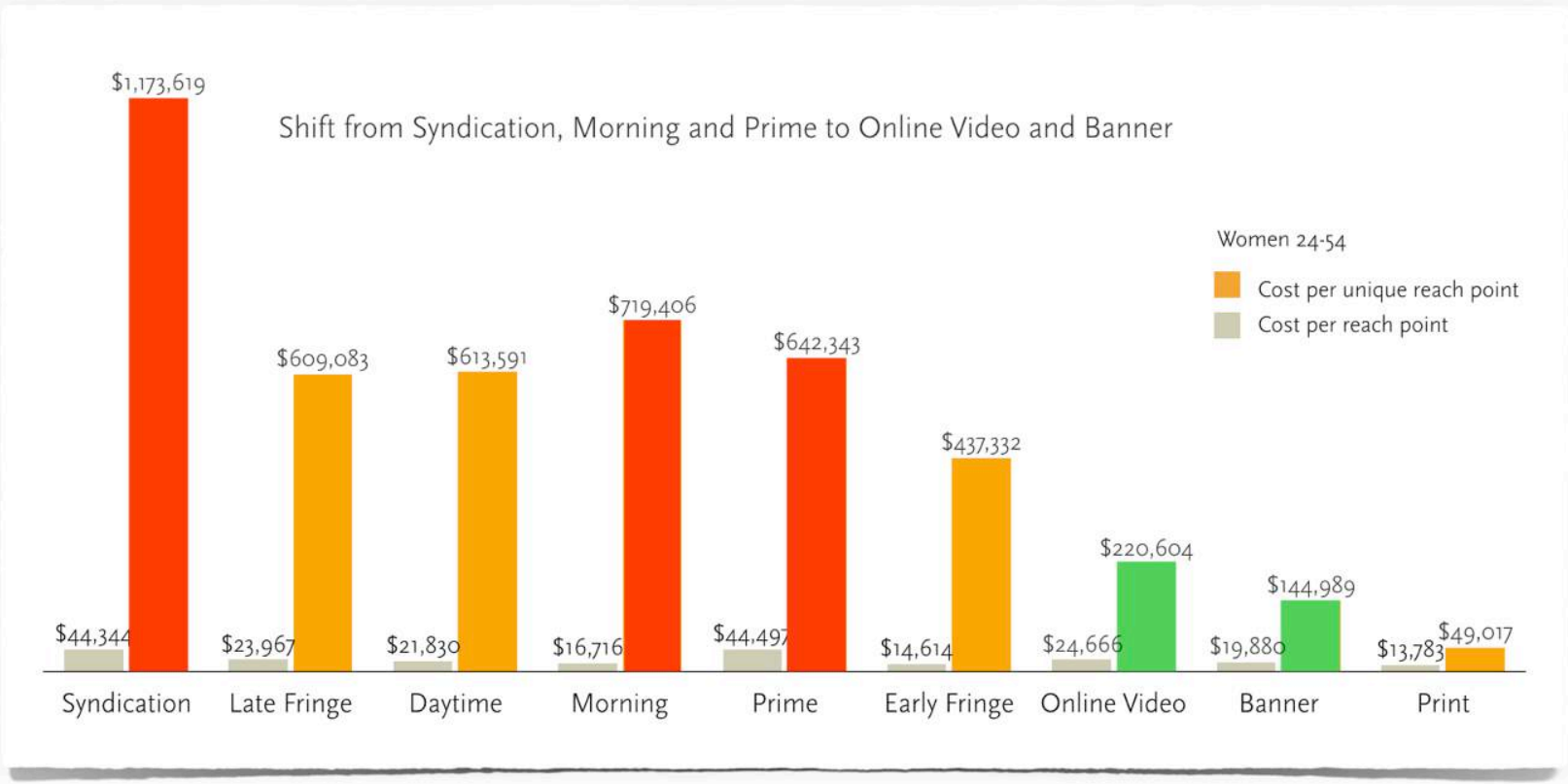
OPPORTUNITY TO INCREASE REACH AT REDUCED COST



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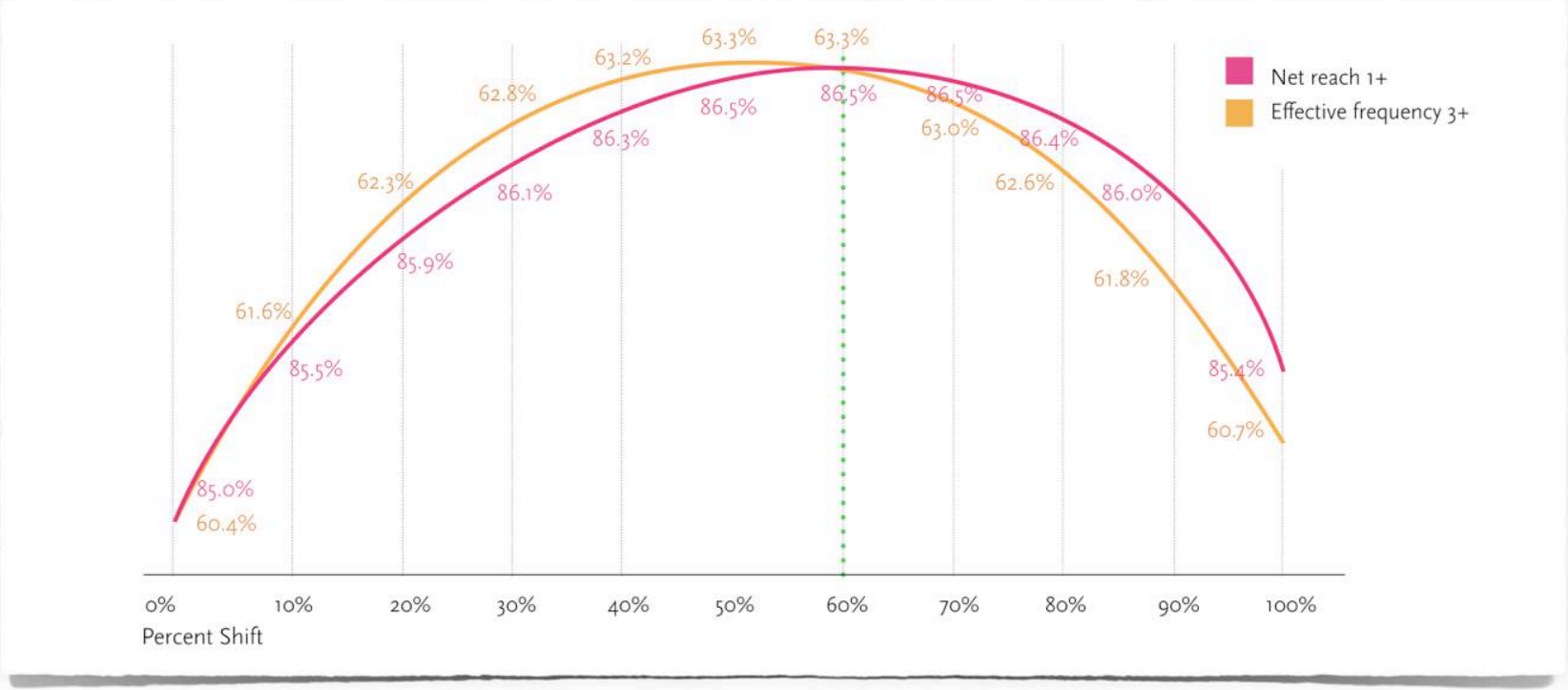
OPTIMZATION

Shift from Syndication, Morning and Prime to Online Video and Banner – retaining the same overall plan budget



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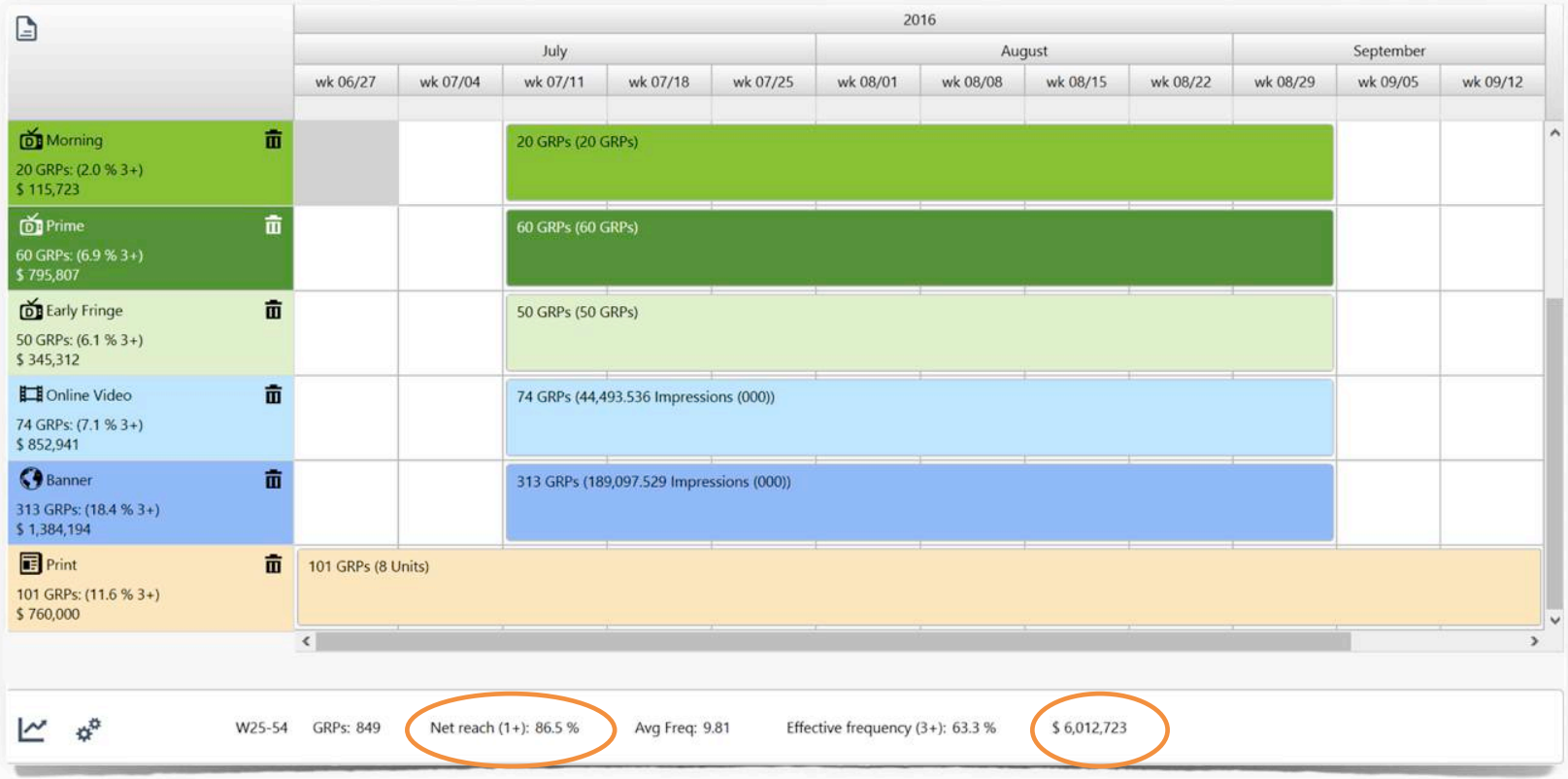
SHIFTED PLAN – 86.5% REACH FOR W 25-54



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REACH-BASED PLANNING IS JUST PART OF THE STORY

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2. UNDERSTAND MEDIA IMPACT

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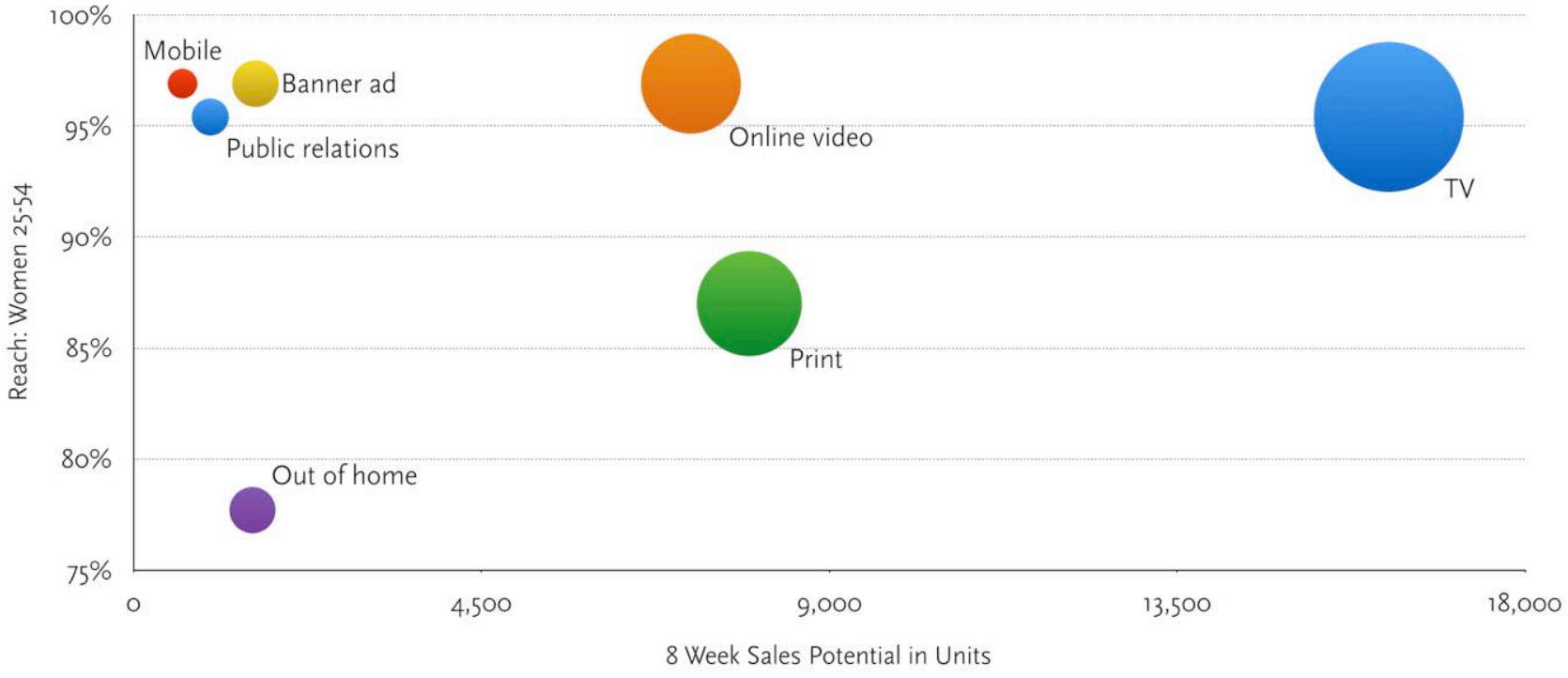
IDENTIFY THE MOST EFFECTIVE CHANNELS



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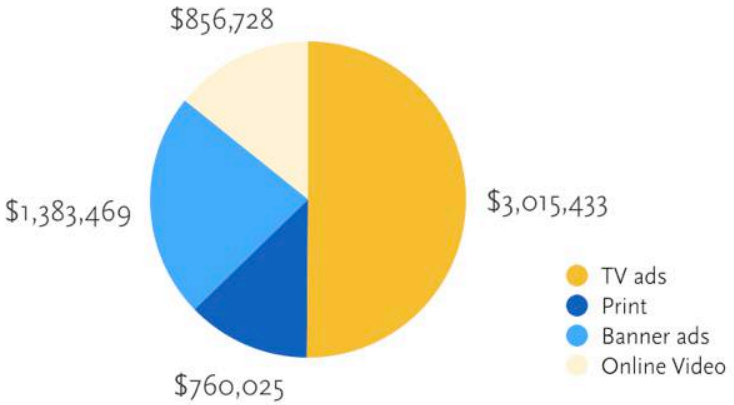
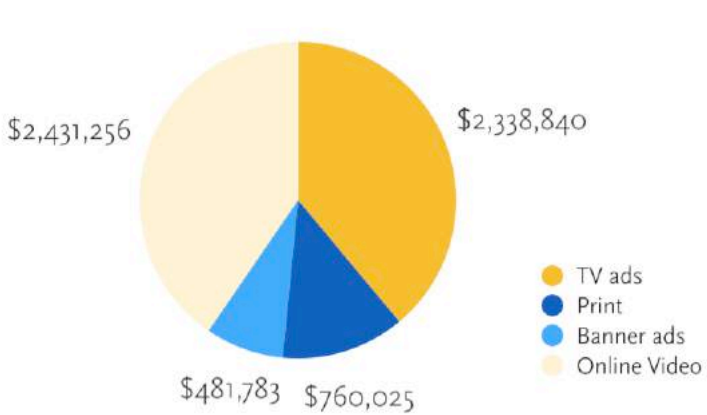
OPTIMIZE CHANNEL MIX WITH REACH AND IMPACT

Shifted Plan



Optimal Budget Allocation



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QUANTIFY IMPACT BY MEDIA CHANNEL

Optimal Allocation: Incremental Units Sold

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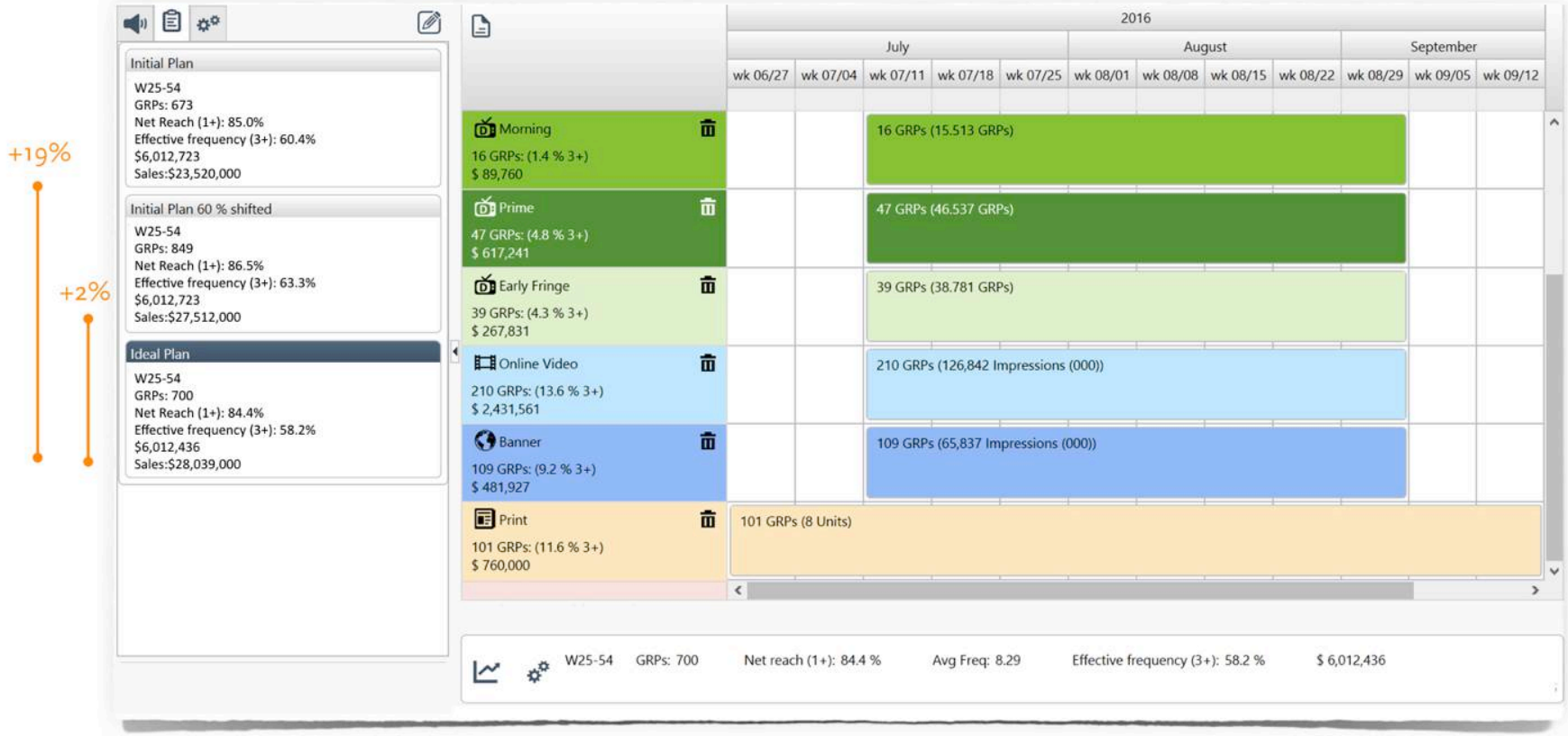
IDEAL PLAN DELIVERS 19% MORE SALES



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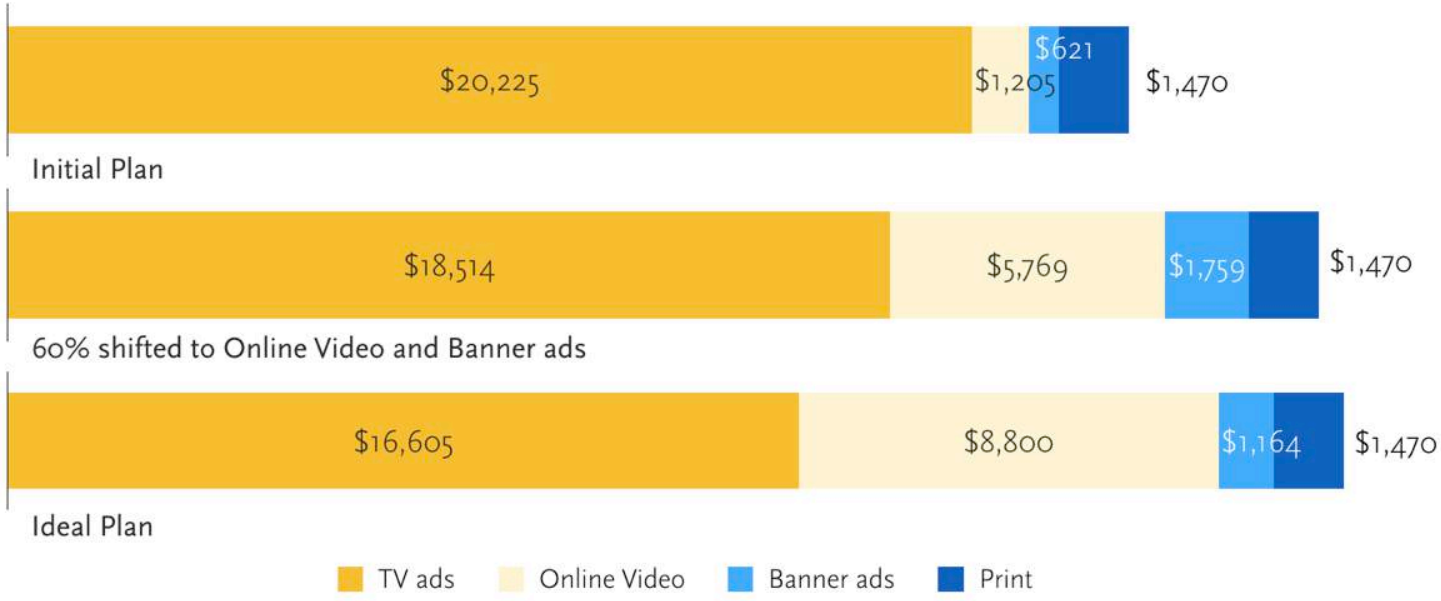
INCREMENTAL SALES DELIVERED BY CHANNEL



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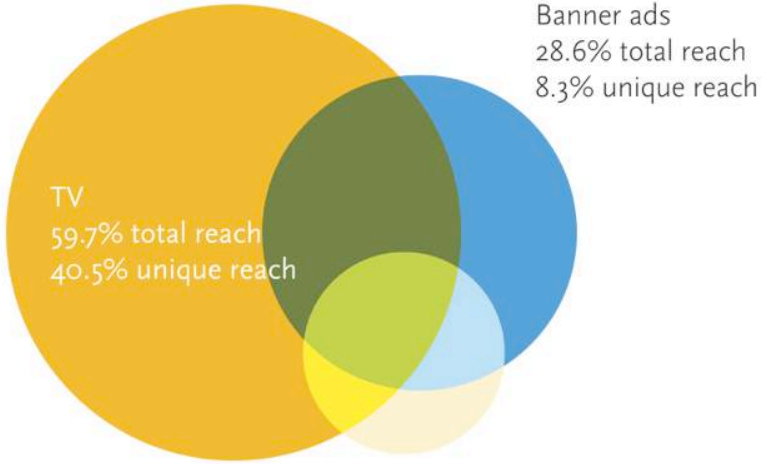
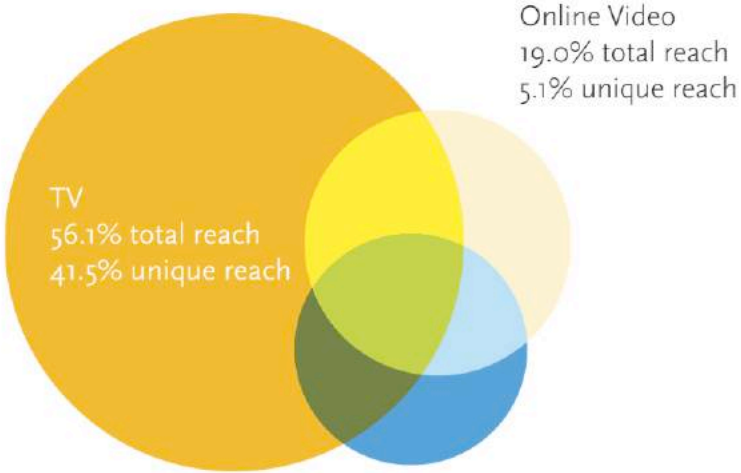
MORE UNIQUE REACH FROM ONLINE VIDEO FOR W25-54

60% shifted to Online Video and Banner ads



Ideal Plan



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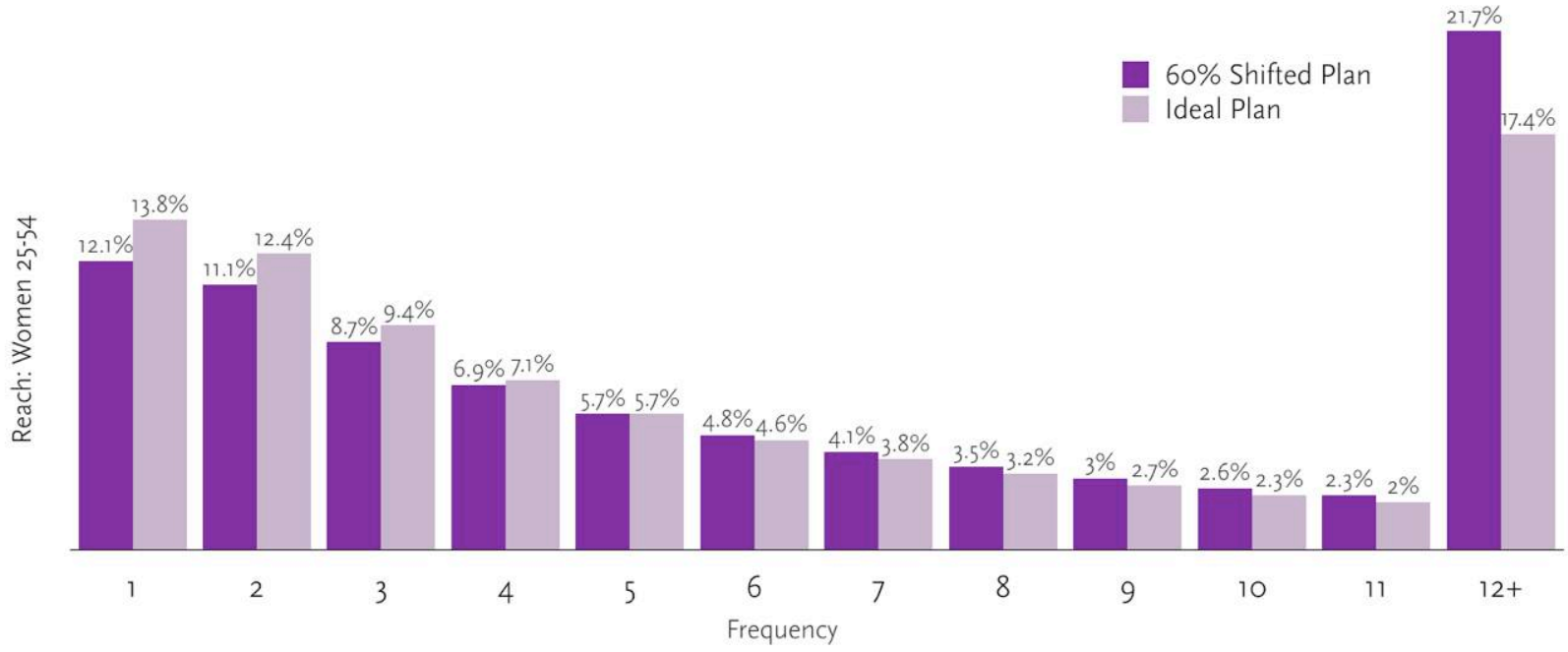
IMPROVED REACH WITH 1-4 FREQUENCY FOR W25-54



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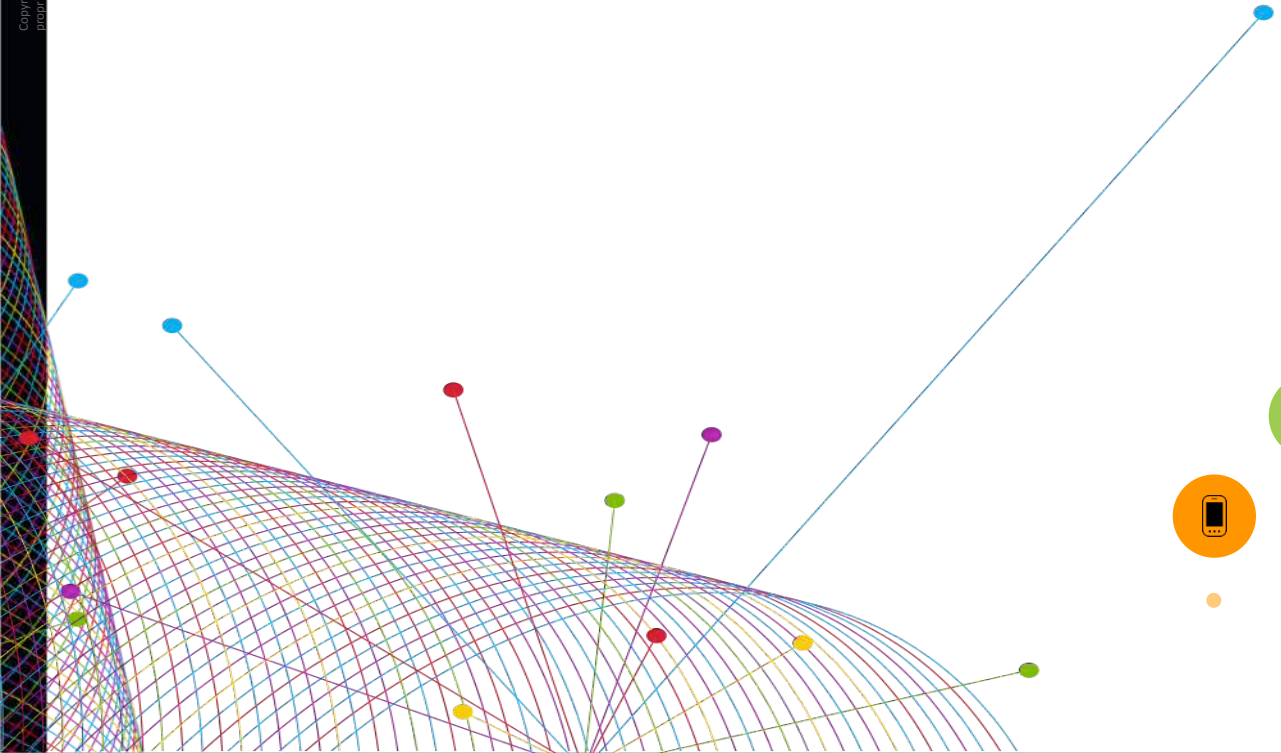
AN UNCOMMON SENSE
OF THE CONSUMER™