

*Remi Boel*  
*President*  
*Technical Committee TV*





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## Permanente structuur CIM

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General Manager

**Sofie Rutgeerts**

Manager TV & Digital Research

+



# Major topics discussed within the TC

- SVZ or “Stand Van Zaken”
- Time logging (“horodatage”)
- TOVA
- OVC
- OVA
- Debates on future adaptations
- ...

# SVZ or “Stand van Zaken”:

Monthly monitoring overview of the survey’s key indicators

- Polling and validation of households in the study
- Monitoring efficiency levels individuals 4+
- Efficiency target group recruitment matrix
- Panel composition
- Panel rotation (forced and voluntary)
- Origin of households recruited
- Monthly viewing evolution (live and live +7)
- Monitoring of Other Screen Use
- Analysis of cascade from recruitment to meter installed
- Devices and equipment, decoders by access provider

# Time logging (“Horodatage”) “As run” files as alternative?





# Time logging: adding indispensable layers to the TAM

- Time logging of programs, trailers, breaks and spots to identify their audiences
  - For programs: content & format identification (CIM Typology)
  - For advertising: break code, campaign ID, MBCID, TVTID
- Valorisation of TV advertising on granular level
  - Granular ad spend details by campaign
  - Adding a unique ID to each creative, enabling spot, campaign identification and attribution to the correct product, brand, advertiser, advertiser group, subsector, sector and economic group
  - Certifying the correct broadcast of the spots



# “As run” files: the alternative for existing time logging?

- Context
  - Existing contract with Nielsen
  - Looking at financial optimisation
- Most of today’s “as run” files are limited
  - Programs only
  - Main broadcasters only
  - Time stamps are estimations
  - No information on trailers
- Objective
  - Get “As Run files” for content, coming from the broadcasters and “planning files” coming from the sales houses ready as reliable sources for time logging of the program content part
  - 2023 start of a hybrid system of time logging and “As Run” files for the content part for those channels for which the “As Runs” have been validated by Nielsen as a solid alternative

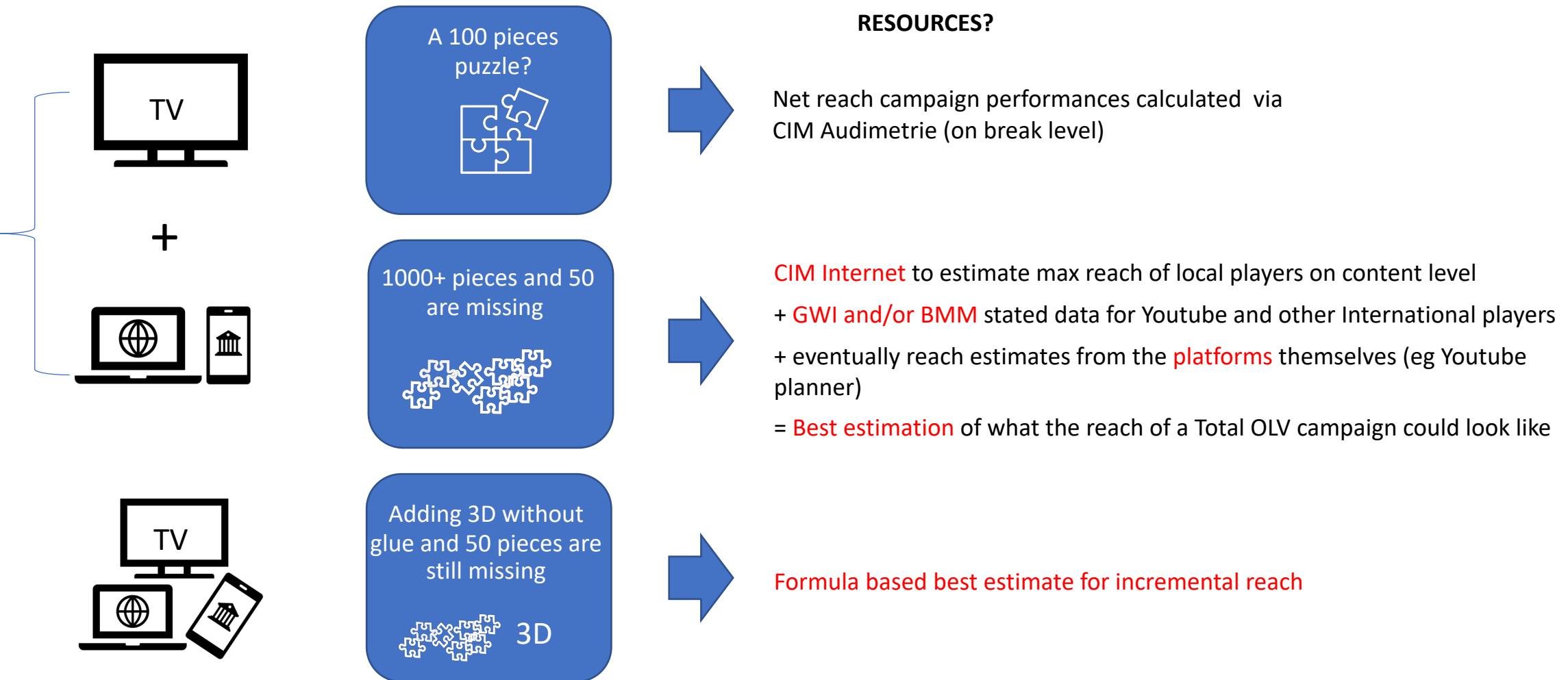


# TOVA: video planning: the strategic window

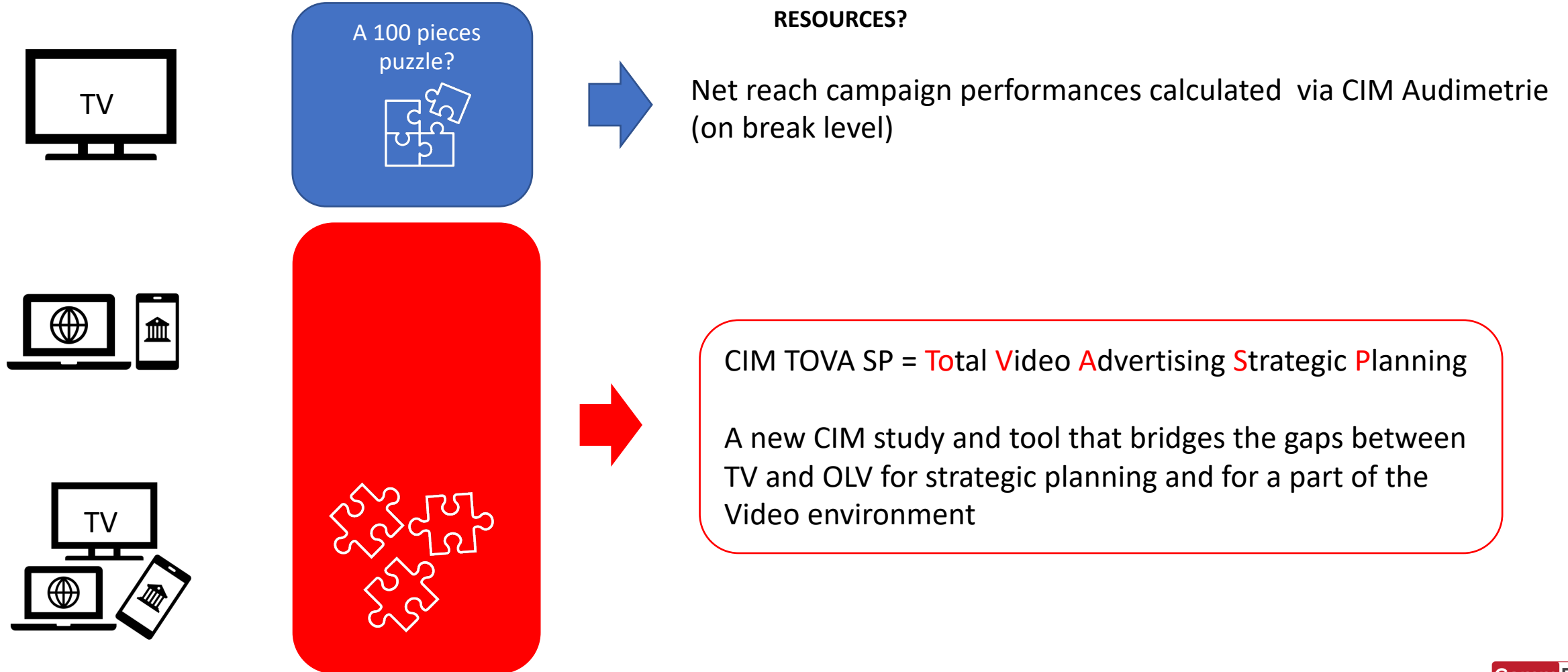
Evolving from TV reach curves to  
Total Video reach with the CIM ToVA



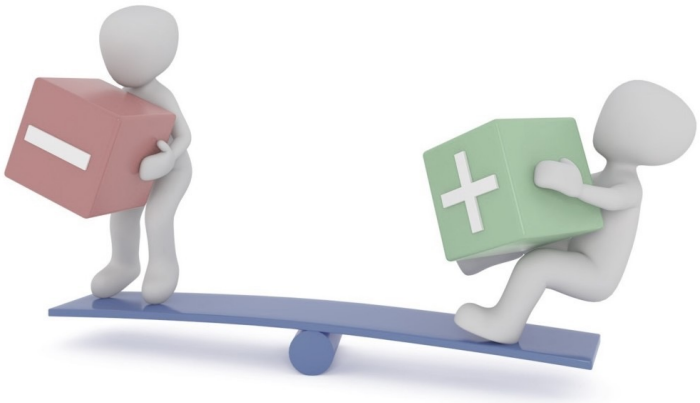
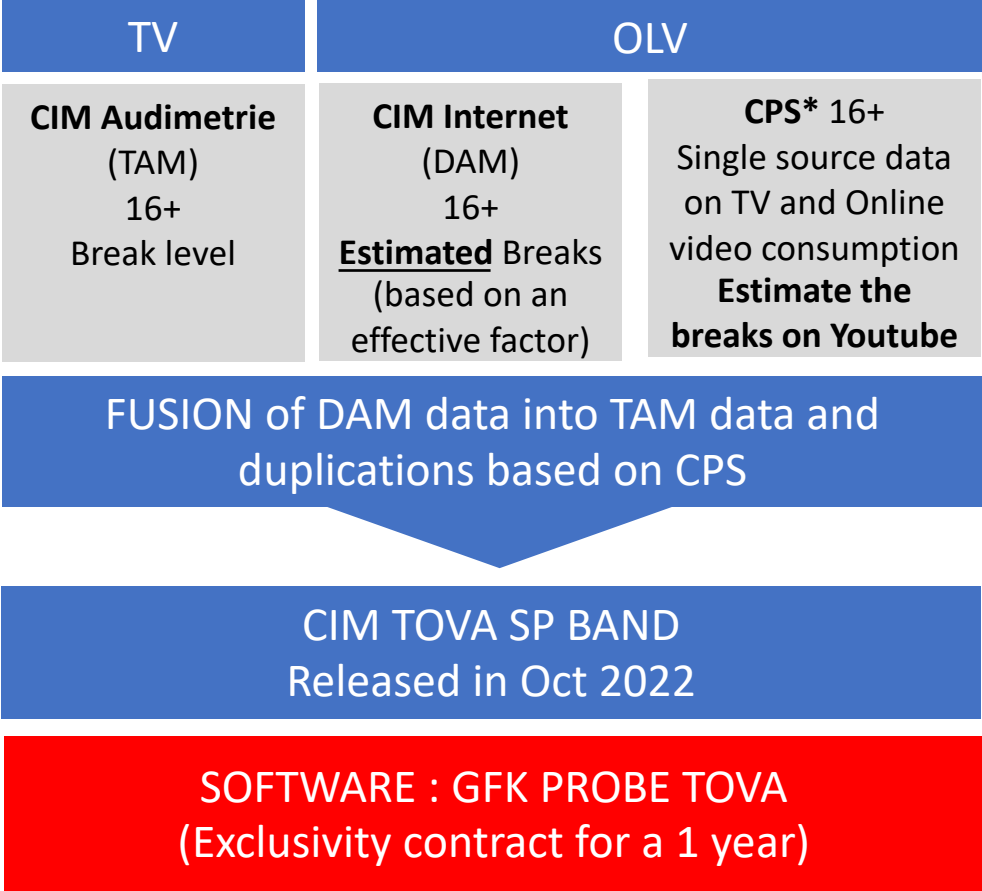
# How combined net reach levels were currently estimated until now



Since this fall, **CIM ToVA** enables us to fill the gaps, partially!



# CIM ToVA methodology in a nutshell



- ✓ R&F forecasts on TV/OLV campaigns
- ✓ Added reach & overlap of TV vs OLV
- ✗ Tactical planning
- ✗ Post-buy evaluation
- ✗ Limited to local OLV + Youtube

\* Cross Platform Survey

# The effective factor to weigh ad contacts on TV and Online



- ✓ For TV, defining a spot viewer is « easy » : a person need to have seen at least 50% of the spot to be considered a viewer of the spot (= at least 50% of ad seen on 100% of the screen)
- ✗ For OLV, we do not know if the person is in contact with the advertising as advertising is not identified separately

THEORETICAL BREAKS for OLV data not available in CIM Internet data

- ➔ Applying EFFECTIVE FACTORS = probability factors applied to OLV impressions to build a common denominator with TV.
- ➔ Effective Factor on OLV varies per platform and is used as weighting factor on impressions (eg: YouTube TrueView reach = # impressions X 35%)

Platform	Ad format	Effective Factor
YouTube	YouTube TrueView	35%
YouTube	YouTube Preroll	85%
YouTube	YouTube Bumper	85%

Platform	Dominant video format	Effective Factor
Belgian sites & apps	Long form	95%
	Long & Short form	90%
	Short form	85%



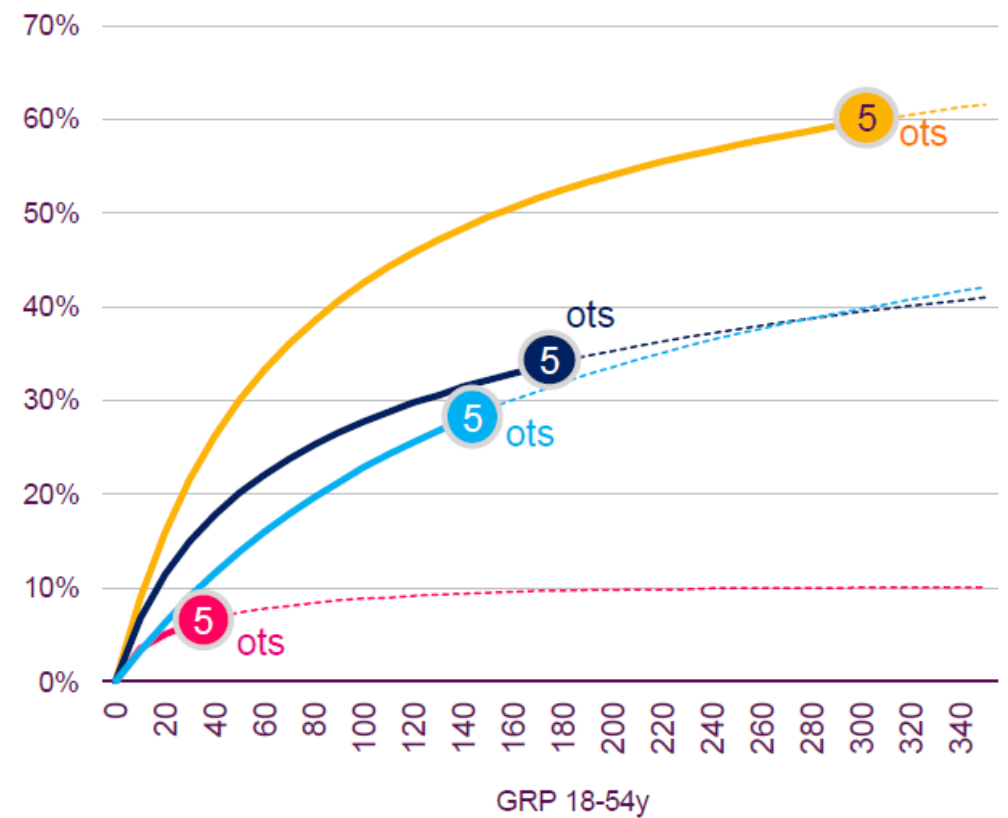
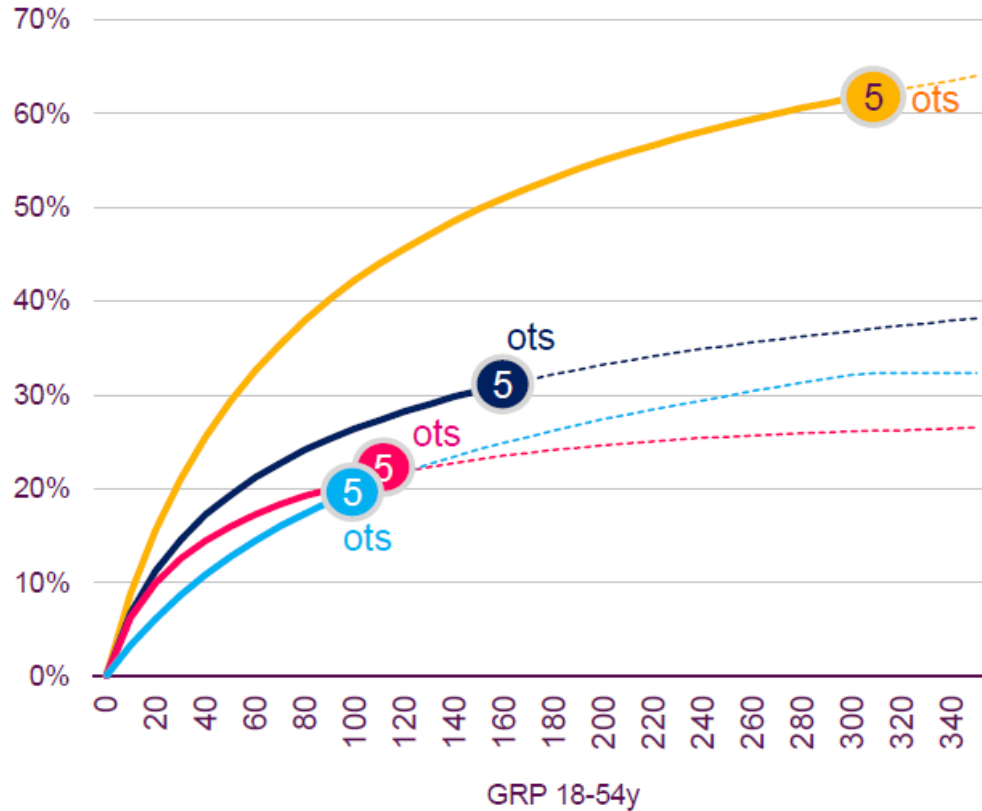
# AVOID OVERSPEND IN EXCESSIVE FREQUENCY

EXAMPLE

## NORTH

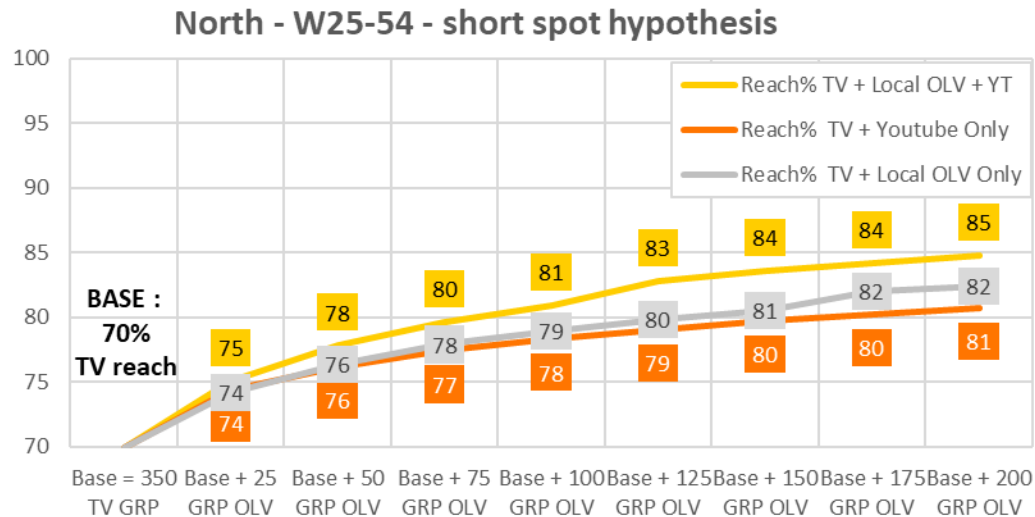
## SOUTH

COVER BUILD UP TO 5 OTS



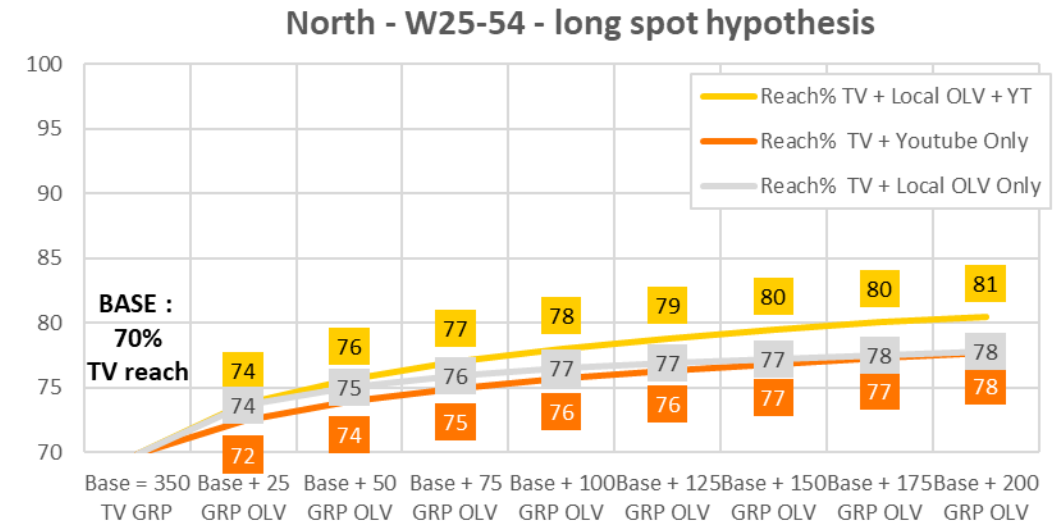
# In the North, combining TV, local OLV and Youtube could increase the reach by 2 to 4 %pts on this specific target

- Hypothesis 1 : a short spot that could be play both on short and long local OLV and as Youtube unskippable pre-roll



- Youtube and local OLV present similar added reach build-up per GRP level
- Adding local OLV allows to gain +/- 2 to 4 points net in coverage 1+ compared to an exclusive use of Youtube

- Hypothesis 2 : a longer spot that could be only be played on long local OLV and as Youtube Trueview



- Slightly less added reach of OLV to TV
- Same conclusion wrt added reach of local OLV vs Youtube Trueview: same added reach build-up for both and a gain of 2 to 3 points in added reach when using both





**What's next?**



# ToVA

- Currently
  - GFK Probe TOVA
  - Strategic / pre-buy tool
  - TV + Local Video + YouTube
- Improvements on the table
  - New Cross Platform Survey Field in 2023
  - Extension of scope: in-read, social media
  - Refine fusion model and updates
  - Other software licences
  - Automated reporting
- Quid ToVA for post campaign evaluation?
  - The need for 1<sup>st</sup> party log data: local & global (GAFAM)



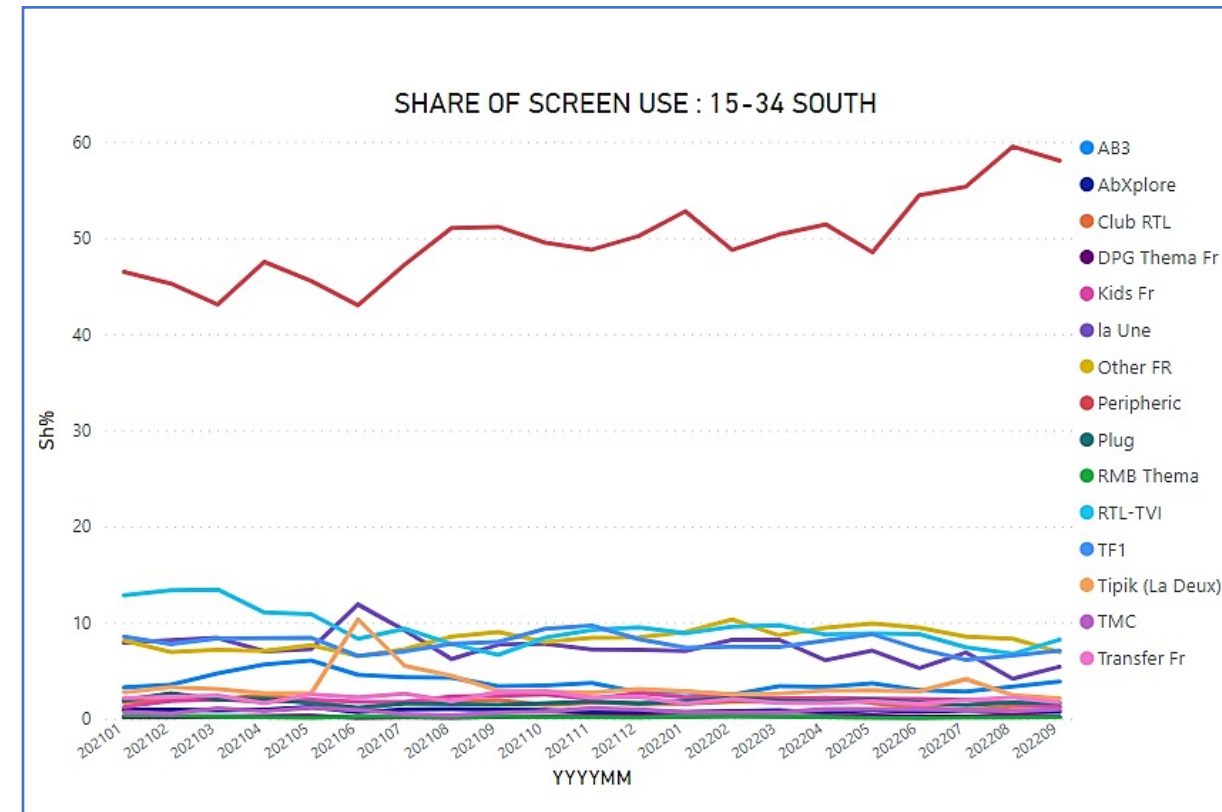
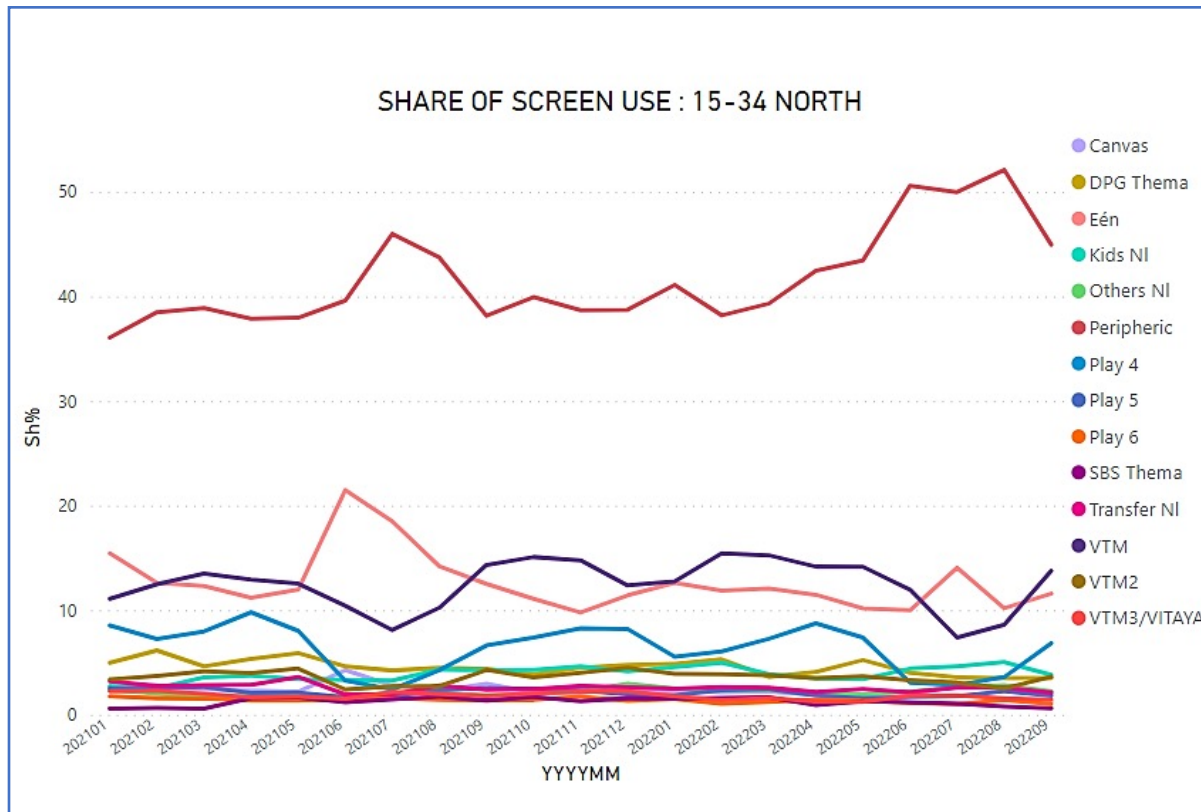
# OVC online video content

- Expand time window for TV programme rating to Live +28 next to the Web+28
- Publication of “web exclusives”
- Identification online volumes on all devices and per device
- Improving TAM on cord cutters

- . Streaming on demand audiences
- . The ATAWAD viewing



# Increasing importance of OSU\* (peripheral), even more on younger target groups



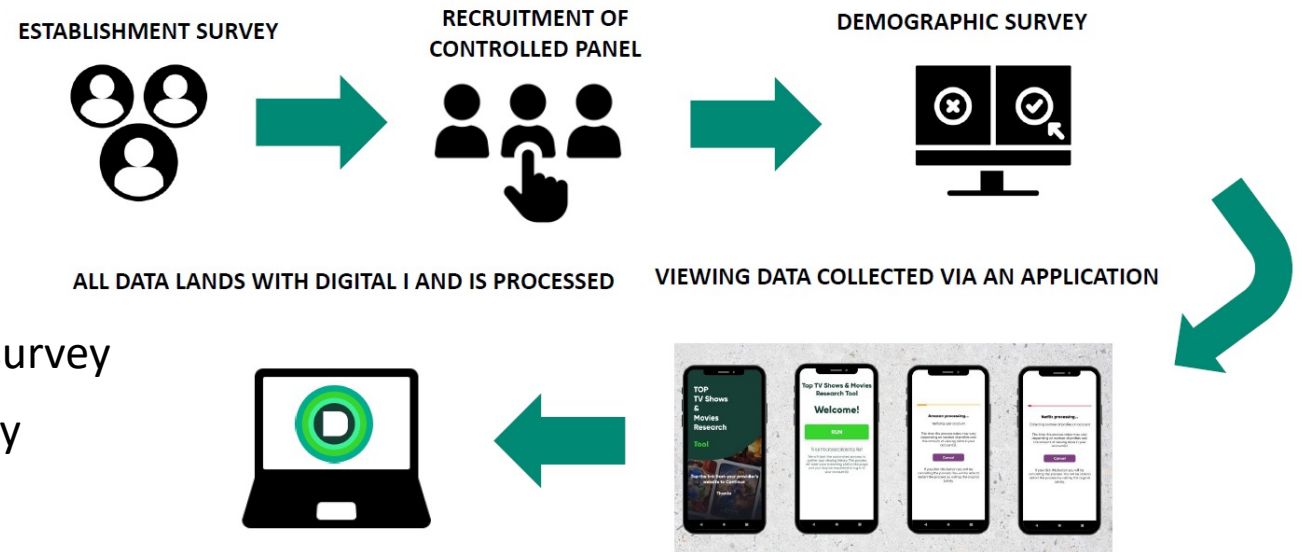
Source: CIM Audimetrie

\*OSU = Other screen usage



# Measuring streaming on demand audiences

- Identifies SVOD Content
  - of Netflix, Amazon Prime, HBO Max, soon Disney+
  - on all devices, at home and outdoors
- Panel based data collection via establishment survey
- Panelists download an app for log data recovery
- Dashboards showing
  - Audience, stream views, viewing length
  - Per program, episode, over a period
  - Cross streaming analysis
  - For the total **subscribers** and their sociodemographic profile







# Output examples

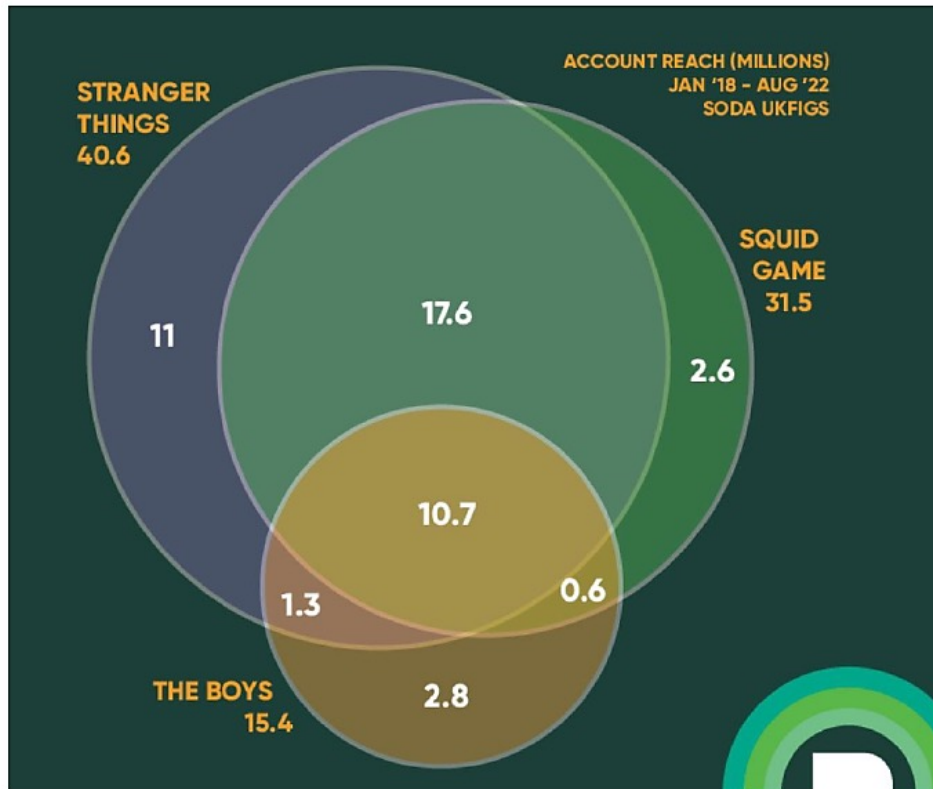
TOP 30 MOVIES / SERIES, FRANCE, NETFLIX AND AMAZON, SEPT 2022, ORDERED BY AVERAGE AUDIENCE

Top 30 Content Table/ Movies & Series								
	Title Name	Title Type	Platform	Release Date	Average Audience (000s)	Streams (000s)	Viewer Minutes (000s)	Average VTR (%)
1	School Life	movie	Netflix	2022-08-28	2,843	3,941	315,857	72.50%
2	Monster: The Jeffrey Dahmer Story	series	Netflix	2022-09-21	2,397	27,023	1,285,119	88.69%
3	Do Revenge	movie	Netflix	2022-09-16	2,325	3,095	280,600	74.55%
4	I Came By	movie	Netflix	2022-08-31	2,321	3,188	256,700	73.90%
5	Love in the Villa	movie	Netflix	2022-09-01	2,142	2,733	248,507	77.73%
6	No Limit	movie	Netflix	2022-09-09	2,106	3,251	250,036	65.45%
7	Athena	movie	Netflix	2022-09-23	2,027	2,923	201,659	68.60%
8	Devil in Ohio	series	Netflix	2022-09-02	1,773	16,145	627,898	87.66%
9	Off the Hook	series	Netflix	2022-09-01	1,744	11,890	346,753	88.04%
10	Fate: The Winx Saga	series	Netflix	2021-01-22	1,734	25,150	1,174,498	89.60%
11	The Lord of the Rings: The Rings of Power	series	Amazon	2022-09-02	1,576	11,125	647,622	84.42%
12	Lou	movie	Netflix	2022-09-23	1,362	1,719	148,826	79.92%
13	Loving Adults	movie	Netflix	2022-08-26	1,343	1,854	142,104	73.82%
14	Me Time	movie	Netflix	2022-08-26	1,244	1,722	129,505	73.65%
15	The Imperfects	series	Netflix	2022-09-08	1,188	13,611	512,041	86.70%
16	End of the Road	movie	Netflix	2022-09-09	1,106	1,499	100,866	74.49%
17	The Intruder	movie	Netflix	2022-09-06	813	1,039	82,924	78.55%
18	Echoes	series	Netflix	2022-08-19	770	6,223	250,493	86.65%
19	The Next 365 Days	movie	Netflix	2022-08-19	728	1,081	82,785	67.73%
20	Trial by Fire	movie	Netflix	2022-09-17	713	925	90,848	74.79%
21	Samaritan	movie	Amazon	2022-08-26	698	827	71,371	83.57%
22	Heartbreak High	series	Netflix	2022-09-14	683	6,245	274,460	88.08%
23	The Sandman	series	Netflix	2022-08-05	629	8,171	350,189	84.96%
24	Partner Track	series	Netflix	2022-08-26	614	6,793	274,742	90.49%
25	Purple Hearts	movie	Netflix	2022-07-29	608	813	75,806	76.79%
26	La jefa	movie	Netflix	2022-08-31	601	907	66,519	68.75%
27	Forsvinnningen på Lorenskog	series	Netflix	2022-09-14	573	3,432	148,536	83.44%
28	Suriname	series	Netflix	2022-09-09	562	4,305	213,843	78.76%
29	Connasse, princesse des coeurs	movie	Netflix	2022-09-01	561	759	46,256	74.66%
30	Barbie in a Mermaid Tale	movie	Netflix	2020-08-01	560	810	41,608	68.64%



## Output examples

### CROSS - STREAMING ANALYSIS



# Measuring streaming services within the TAM panel: the BARB solution



## Netflix partners BARB: mystery viewing figures solved?

The data will be used by advertisers, competitors and journalists to determine the success of various Netflix shows. Just in time for the streaming giant to open its ad-supported tier.

by Robin Langford | 12 October 2022



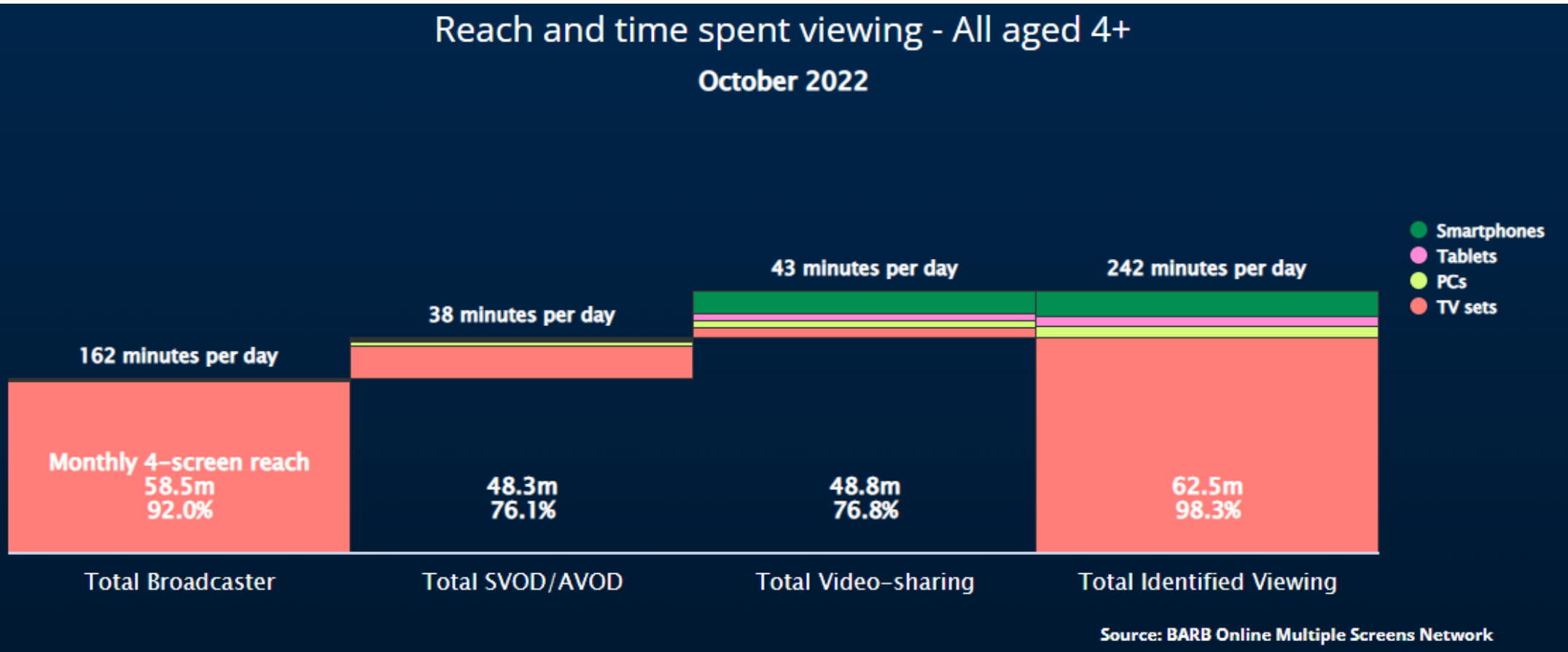
<https://www.performancemarketingworld.com/article/1801823/netflix-partners-barb-mystery-viewing-figures-solved>



# Streaming services measured by BARB

Viewing summary published monthly on BARBs site.

→ SVOD/AVOD services account for more than 0.5% of total identified viewing



# Streaming services measured by BARB

Weekly ranking of all video content

Rank	Title	Service	Aggregated average audience - all 4+ (m)
1	Shetland (Series 7, E1)	BBC	6.8
2	Marriage (S1, E1)	BBC	6.5
3	Coronation Street (S63, E180)	ITV	6.2
4	Ridley (S1, E1)	ITV	5.9
5	Van der Valk (S2, E1)	ITV	5.8
6	Emmerdale (S51, E9438)	ITV	5.1
7	Love Island (S8, E57)	ITV	4.9
8	The Suspect (S1, E1)	ITV	4.6
9	Match of the Day (S2022, E4)	BBC	4.6
10	Celebrity MasterChef (S17, E1)	BBC	4.4
11	Love Island: The Reunion (S5, E9)	ITV	4.4
12	Ambulance (S9, E2)	BBC	4.3
13	Commonwealth Games (S2022)	BBC	4.2
14	Long Lost Family: What Happened Next (S7, E1)	ITV	4.1
15	FILM: Lightyear (2022)	Disney+	4.0
16	Antiques Roadshow (S44, Ulster Folk Museum)	BBC	3.9
17	House Of The Dragon (S1, E1)	Sky	3.7
18	Countryfile (S1, Heatwave Special)	BBC	3.7
19	The Capture (S2, E1)	BBC	3.6
20	The Royal Edinburgh Military Tattoo (S1, 29/08/22)	BBC	3.6

# Streaming services measured by BARB

Reach & time spent viewing All aged 4+ (September 2022)	Monthly Reach		Share of Total Identified Viewing	Average Daily Minutes
	000s	%	%	MM:SS
Reporting Universe	63,519			
Total Broadcaster Viewing	58,838	92.6	66.9	158:58
BBC	55,163	86.8	23.6	56:08
ITV	48,395	76.2	13.5	32:08
Channel 4	48,055	75.7	7.1	16:46
Sky/NBCU	38,670	60.9	6.0	14:10
Channel 5 / Paramount	42,842	67.5	5.1	12:07
UKTV Media	28,998	45.7	2.9	6:57
Discovery Networks	24,428	38.5	2.8	6:43
Narrative Entertainment	14,548	22.9	0.9	2:13
CBS AMC Networks	10,019	15.8	0.7	1:43
BT Sport	8,714	13.7	0.6	1:28
A+E Networks	9,027	14.2	0.6	1:22
All other Broadcasters	35,903	56.5	3.2	7:45

	Monthly Reach		Share of Total Identified Viewing	Average Daily Minutes
Total SVOD/AVOD	47,801	75.3	15.2	36:03
Netflix	40,516	63.8	8.2	19:29
Amazon	30,246	47.6	3.6	8:26
Disney+	24,078	37.9	3.0	7:14
All other AVOD/SVOD	5,236	8.2	0.3	0:49

Total Video-Sharing	47,936	75.5	17.8	42:17
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# Challenges for integration of these solutions in CIM TAM?

- Panel size?
- Library in English / French and Dutch?
- Interest from SVOD platforms?
- Solution outside TAM via XMC?

# XMC\* - Video use cases

- Measuring video viewing
  - Anytime, Anywhere on Any Device
  - For AVOD, local and international SVOD
  - Content identification for major streaming players and Streamz
- Modelling, fusion & data merge
  - Online video content measurement:
    - Identification and profiling of current and future content windows
    - Live TV, on demand TV, clips, previews & web-exclusive content (to be aligned versus current CIM pathway)
    - Unlocking the online video presence of the regional channels, theme channels, regional publishers and thematic publishers
- Campaign validation for instream online video campaigns
  - Campaign volume measurement and profile
  - In target R&F per campaign & domain (preferably by declaration of campaign logs)
- Updating TOVA tool through passive measurement (of 1st screen, mobile screens & instream campaign validation) and with calibration to real campaign data
- Development of a (near to) real time R&F engine for post-buy evaluation of a total video campaigns





*Thank you*