Know What's Next
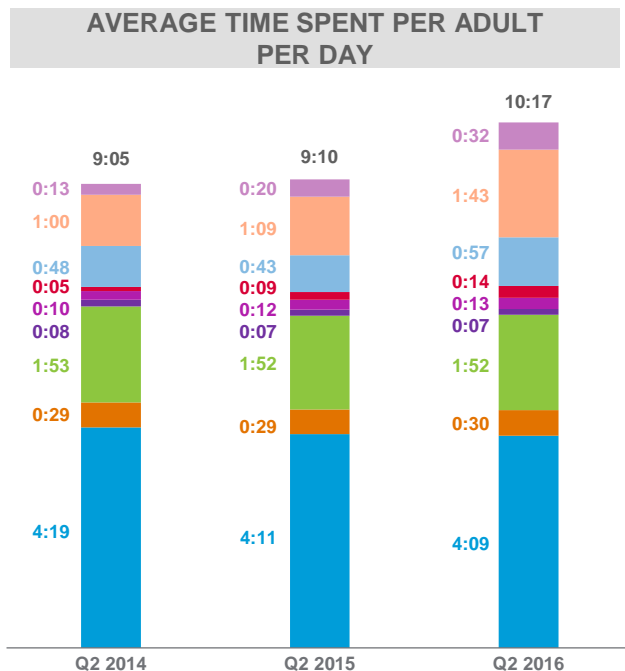
E-Business & Social Media World
21 Ιουνίου 2018

Σπύρος Ζαβιτσάνος
Διευθύνων Σύμβουλος

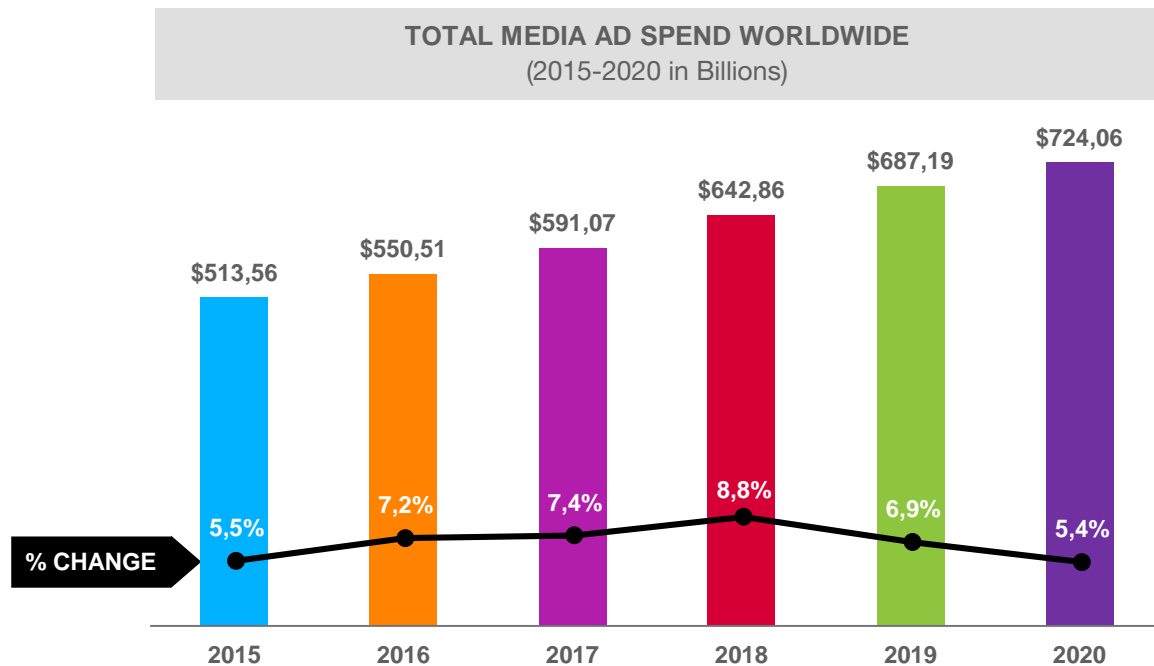# CHANGING MEDIA USAGE IN THE US

AVERAGE TIME SPENT PER ADULT PER DAY

	Q2 2014	Q2 2015	Q2 2016
Total	9:05	9:10	10:17
Tablet (App/Web)	0:13	0:20	0:32
Smartphone (App/Web)	1:00	1:09	1:43
Internet on PC	0:48	0:43	0:57
Multimedia Device	0:05	0:09	0:14
Videogame Console	0:10	0:12	0:13
DVD	0:08	0:07	0:07
AM/FM Radio	1:53	1:52	1:52
Time Shifted TV (DVR)	0:29	0:29	0:30
Live TV	4:19	4:11	4:09

	2015-16 Diff%	2015-16 Diff%	
TOTAL	**1:07**	**+12%**	
Tablet (App/Web)	0:12	+60%	▲
Smartphone (App/Web)	0:34	+49%	▲
Internet on PC	0:14	+33%	▲
Multimedia Device	0:05	+56%	▲
Videogame Console	0:01	+8%	▲
DVD	0:00	0%	
AM/FM Radio	0:02	+2%	▲
Time Shifted TV (DVR)	0:01	+3%	▲
Live TV	(0:02)	-1%	▼

Source: Nielsen Total Audience Report Q2 2016

TOTAL AD SPEND GLOBALLY

Ad spend continues to grow although growth rates predicted to slow

TOTAL MEDIA AD SPEND WORLDWIDE
(2015-2020 in Billions)

2015	2016	2017	2018	2019	2020
$513,56	$550,51	$591,07	$642,86	$687,19	$724,06
5,5%	7,2%	7,4%	8,8%	6,9%	5,4%

% CHANGE

AD SPEND PERCENTAGE BY MEDIA MIX

Australia and US digital ad spend is larger than TV

Australia
- 40.4 DIGITAL
- 5.1 OOH
- 7.7 RADIO
- 18.3 PRINT
- 28.6 TV

Japan
- 24.1 DIGITAL
- 17.4 OOH
- 2.9 RADIO
- 21.7 PRINT
- 33.9 TV

Mexico
- 19.1 DIGITAL
- 7.6 OOH
- 10.7 RADIO
- 17.8 PRINT
- 44.7 TV

Italy
- 27.2 DIGITAL
- 2.17 OOH
- 5.5 RADIO
- 18.9 PRINT
- 45.7 TV

US
- 36.2 DIGITAL
- 4.9 OOH
- 8.2 RADIO
- 15.4 PRINT
- 35.3 TV

Legend: ● TV ● PRINT ● RADIO ● OOH ● DIGITAL

Source: PWC Media and Entertainment Outlook report 2016-202, 2015 ad spend numbers

PREDICTION 1:

Time spent will continue to rise via multitasking, mobile access will grow and more channels will come to life

PROLIFERATION OF IOT

30 billion objects may be connected to the Internet of Things by 2020

26 billion – 30 billion objects in 2020

7 billion – 10 billion objects in 2013

~15-20% growth annually

Source: McKinsey & Company: The Internet of Things: Sizing up the Opportunity. Dec 2104. http://www.mckinsey.com/industries/high-tech/our-insights/the-internet-of-things-sizing-up-the-opportunity
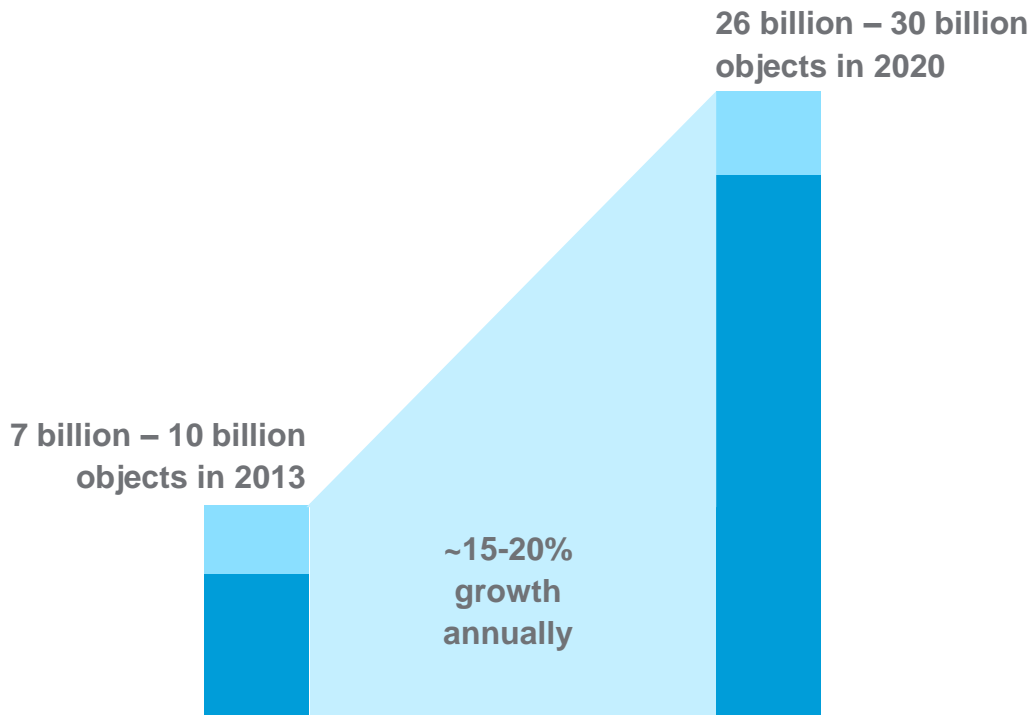
PREDICTION 2:

Consumers will continue to watch live TV and managed carefully, will be more open to sharing personal information

MILLENNIALS
TODAY

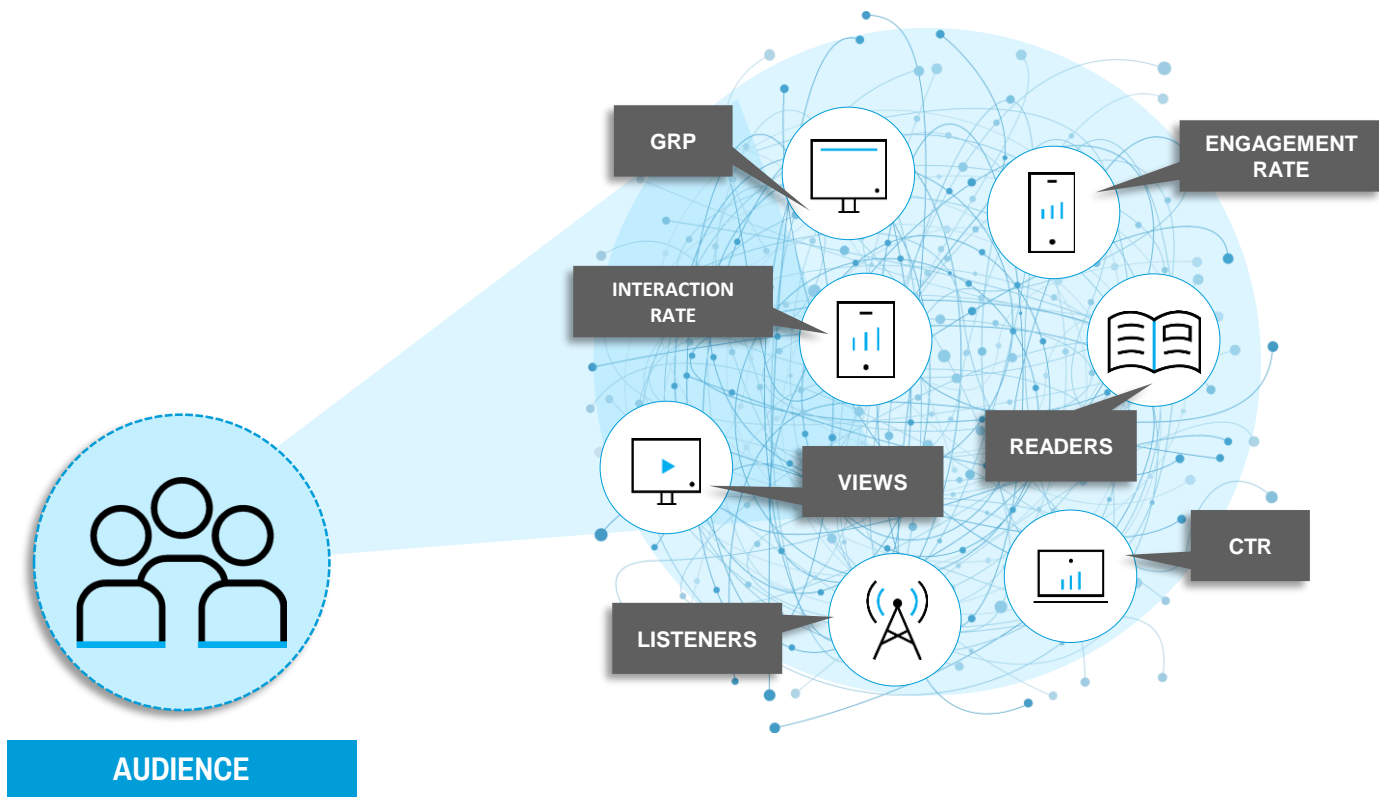| LIVE TV	DVR	VOD	DEVICES
2.75 HOURS	**48%**	**40%**	**66%**
Spent Daily Watching Live TV	Have Access to DVR	Have Access to Streaming Video on Demand	Use a TV Connected Device on Any Given Day

PREDICTION 3:

The world will go addressable

MEASURING

THE MARKETPLACE

THE MARKETPLACE IS INCREASINGLY COMPLEX

GRP

ENGAGEMENT RATE

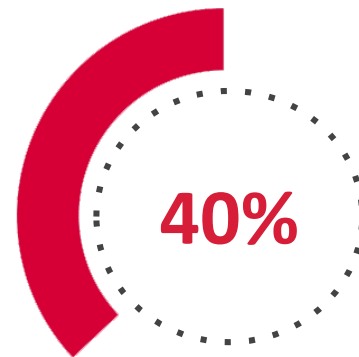INTERACTION RATE

READERS

VIEWS

CTR

LISTENERS

AUDIENCE

CAMPAIGNS ARE STILL MISSING KEY AUDIENCES

Finding your audiences across digital devices is harder than it seems
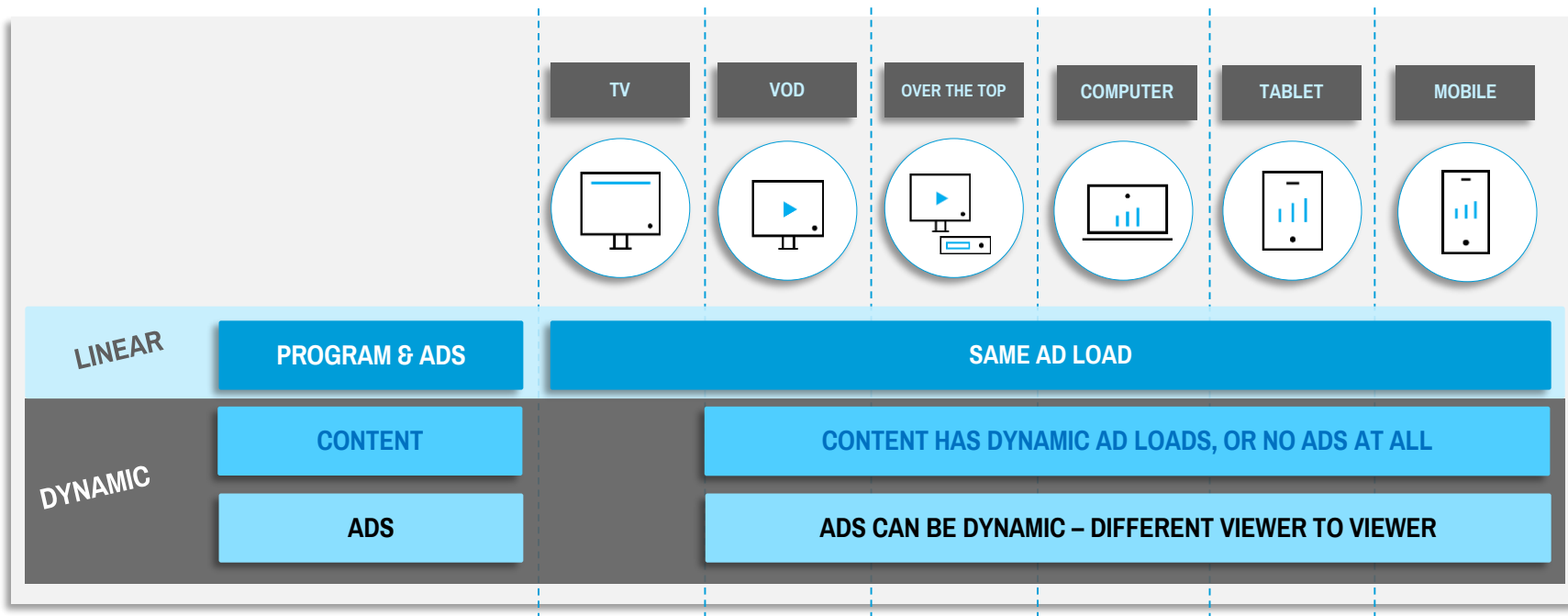
47%
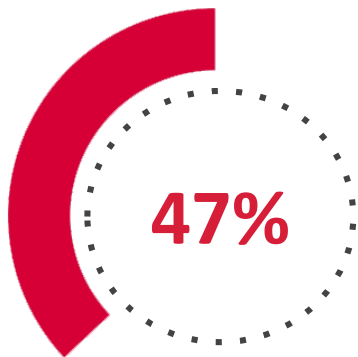
of impressions
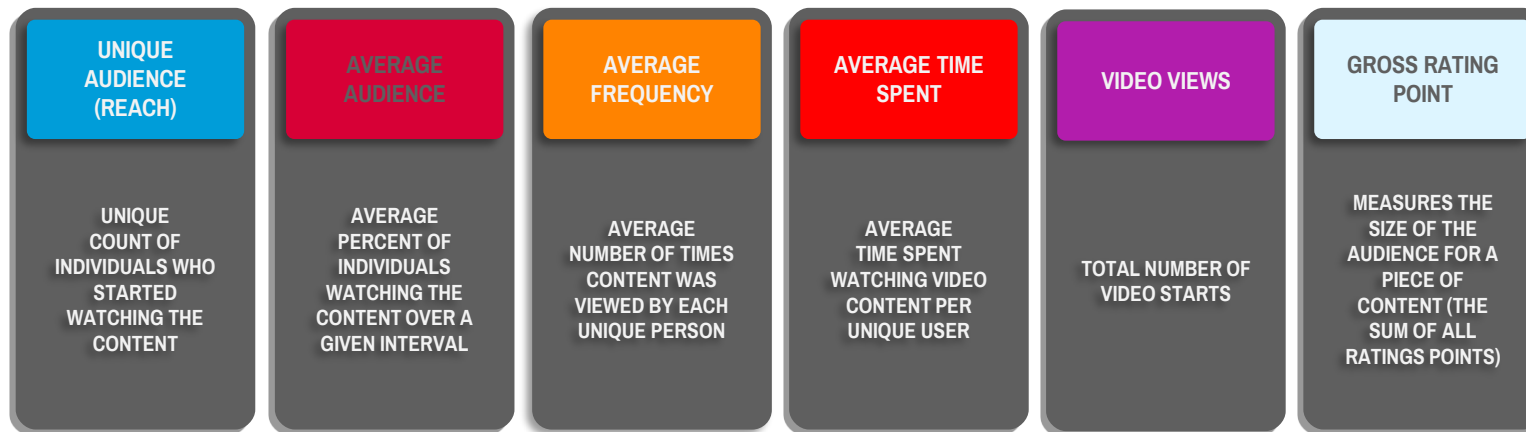*miss their target*
demo

40%

of impressions
are not seen

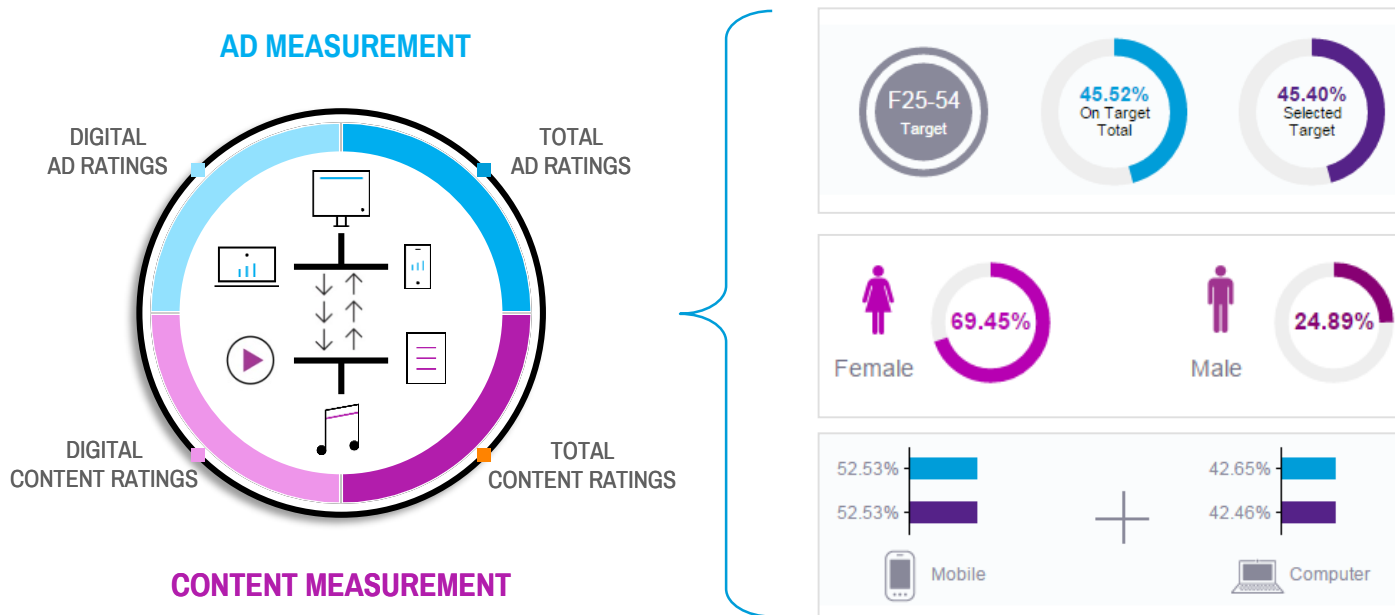# HOW DO WE CREATE COMPARABLE METRICS ACROSS DIGITAL AND TV ADS?

COMPARABLE METRICS ACROSS PLATFORMS

Align Digital Content Ratings data to TV data with comparable metrics

UNIQUE AUDIENCE (REACH)	AVERAGE AUDIENCE	AVERAGE FREQUENCY	AVERAGE TIME SPENT	VIDEO VIEWS	GROSS RATING POINT
UNIQUE COUNT OF INDIVIDUALS WHO STARTED WATCHING THE CONTENT	AVERAGE PERCENT OF INDIVIDUALS WATCHING THE CONTENT OVER A GIVEN INTERVAL	AVERAGE NUMBER OF TIMES CONTENT WAS VIEWED BY EACH UNIQUE PERSON	AVERAGE TIME SPENT WATCHING VIDEO CONTENT PER UNIQUE USER	TOTAL NUMBER OF VIDEO STARTS	MEASURES THE SIZE OF THE AUDIENCE FOR A PIECE OF CONTENT (THE SUM OF ALL RATINGS POINTS)

NIELSEN TOTAL AUDIENCE FRAMEWORK

Consistent, comparable, people-based metrics for content and ads that provide transparency for the media ecosystem

AD MEASUREMENT

DIGITAL AD RATINGS

TOTAL AD RATINGS

DIGITAL CONTENT RATINGS

TOTAL CONTENT RATINGS

CONTENT MEASUREMENT

F25-54 Target

45.52% On Target Total

45.40% Selected Target

Female 69.45%

Male 24.89%

52.53% / 52.53% — Mobile

42.65% / 42.46% — Computer

NIELSEN'S ANSWER TO THE MARKET CHALLENGE:

DIGITAL AD RATINGS
provides transparent and actionable audience measurement across digital screens

Digital Ad Ratings

Audience demographics
Reach/frequency/GRPs
Viewability by demographic

WHAT

Reach

Frequency

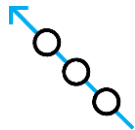Gross Rating Points

HOW…

…by day

…by publisher

…by placement

…by demo

And on top

The first
MRC-accredited independent
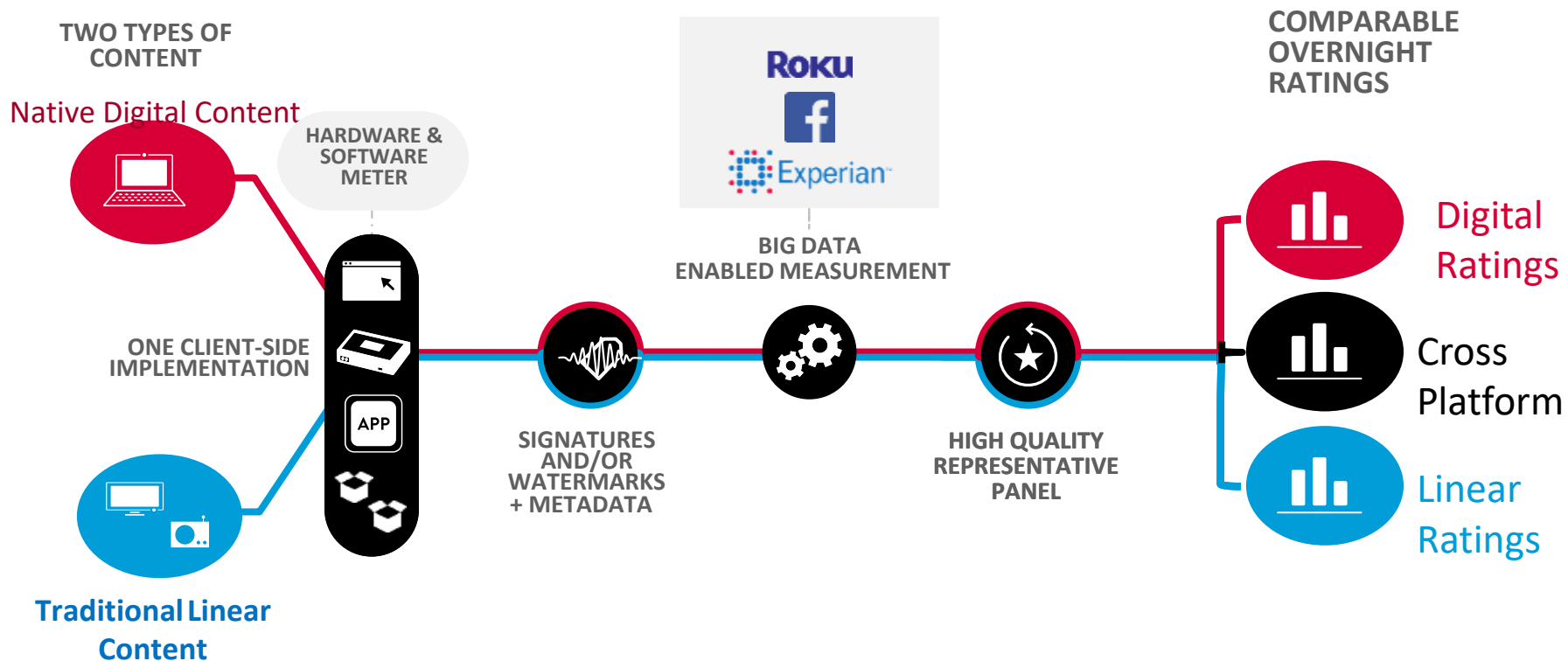measurement solution

Accuracy

Speed and
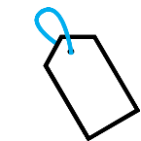Granularity

Cross-Platform
Comparability

TOTAL AUDIENCE METHODOLOGY

TWO TYPES OF CONTENT
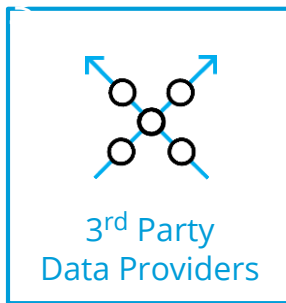
Native Digital Content

HARDWARE & SOFTWARE METER

ONE CLIENT-SIDE IMPLEMENTATION

APP

Traditional Linear Content

Roku

Experian

BIG DATA ENABLED MEASUREMENT

SIGNATURES AND/OR WATERMARKS + METADATA

HIGH QUALITY REPRESENTATIVE PANEL

COMPARABLE OVERNIGHT RATINGS

Digital Ratings

Cross Platform

Linear Ratings

THE BEST DATA FROM THE MOST TRUSTED SOURCES

Tag → Count → Match → Calibrate → Report

Nielsen Tag + Nielsen Server + 3rd Party Data Providers + Nielsen Panel / Mobile Survey + Nielsen Mediaview / Reporting API

MOAT DoubleVerify

Viewability by Demographic
powered by your preferred viewability provider

Age & Gender