

Final report

Total TV ad measurement project,
by Dolores Group and Screenforce Finland

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1. Summary

TV companies sell TV audiences regardless of the distribution channel. The broadcasters produce TV audiences, that can be measured and reported (post campaign) per campaign (TRP's and net reach). The same measurement cannot measure net reach of TV audiences (linear) and other video audiences. Broadcasters linear and other video content is planned, reported and sold with different measurement indicators. The goal is to bring these closer together, with the help of total tv ad measurement. The measurement system should be unified for the Finnish TV industry, thus creating the possibility of a planning, reporting and sales currency.

The definition of currency varies, so for a clear view, we started the project by determining what we mean by currency for this project: **Currency is the validated contacts that buyers and sellers trade with. A currency is based on a valid, transparent and accepted measurement.**

The goal was also to investigate options of approaching cross video measurement. Options that can secure TV's role in the future. The challenge is that the advertiser has no cross measurement KPI's across the video platforms. This project aims to investigate options and recommendations for the future, for specifically the Finnish market.

The information for the project was gathered mainly through industry expert interviews and market examples but also through researching articles. The summaries may be from several sources and do not necessarily directly reflect the interviewed sources view.

Dolores Group finalized a recommendation of three possible paths towards a Total TV ad currency: 1) A full RFP 2) Kantar and Finnpanel 3) Add on -solution. The options vary in timeline, price and risks. As the project revealed, there is no market with a true Total TV ad currency (as we define) and a solution that would fit our market.

1.2. Background

Screenforce Finland is a trade body for commercial television in Finland. Screenforce Finland was founded in 2016. The members include: MTV Media, Sanoma Media Finland, Discovery Networks Finland, Fox Networks Group Finland and Viacom CBS. Screenforce is committed to lead efforts to advance the commercial television industry.

TV companies sell TV audiences regardless of the distribution channel. The broadcasters produce TV audiences, that can be measured and reported (post campaign) per campaign (TRP's and net reach). The same measurement cannot measure net reach of TV audiences (linear) and other video audiences. Broadcasters linear and other video content is planned, reported and sold with different measurement indicators.

Total TV viewing (online Tv + linear) became a part of the TV measurement in 2018 (Finnpanel) but Total TV advertising measurement is still missing.

The aim is to have cross media measurement all distribution channels of television advertising (linear and online TV), considering international developments and the needs of the advertiser. The World Federation of Advertisers (WFA), which represents advertisers, has taken the initiative to highlight advertisers' challenges and present principles that the advertisers can stand behind. An advertiser often buys both television advertising and video advertising. There are no comparable metrics for these different platforms. The WFA has several cross media measurement initiatives and currently the video & TV measurements are involved in a larger global discussion, together with the media owners, trade bodies and advertisers.

Many media agencies have already developed their own ways of modelling cross media metrics. The challenges are global, and we want to look at developments and standards accordingly. We strive for co-operation and exchange of information between industry organizations and international projects. We want to openly look at different options with international players and standards in mind.

On the other hand, we primarily want to ensure the competitiveness of domestic commercial television in the growing video advertising field.

1.3 Goals

The main goal is to investigate concrete options for cross video measurement, that can secure TV's role in the future. The challenge is that the growing video market, the advertiser has no cross measurement KPI's across the video platforms. This project aims to investigate options and recommendations for the future, within the Finnish market.

The project should produce several options weighing the potential strategic advantages/ disadvantages. The options can vary in scale and should all include prices and be realistic to implement

1.4 Scope and considerations:

The scope of this project is to evaluate TV and video advertising measurement options from a commercial business perspective, also considering the pros and cons of the options that investigate both planning and a long term goal of a currency.

Two different paths should be explored and a variation of options from both:

1. International market and total TV advertising measurement (WFA initiative).
2. Finnish market and broadcaster total TV advertising measurement

The possibilities of the investigation are limited to the area of operation of Screenforce Finland's members: MTV Oy, Sanoma Media Finland, Discovery Networks Finland and Fox Networks Group

2. Project description

2.2. Project roles

The project as a combination of resources including:

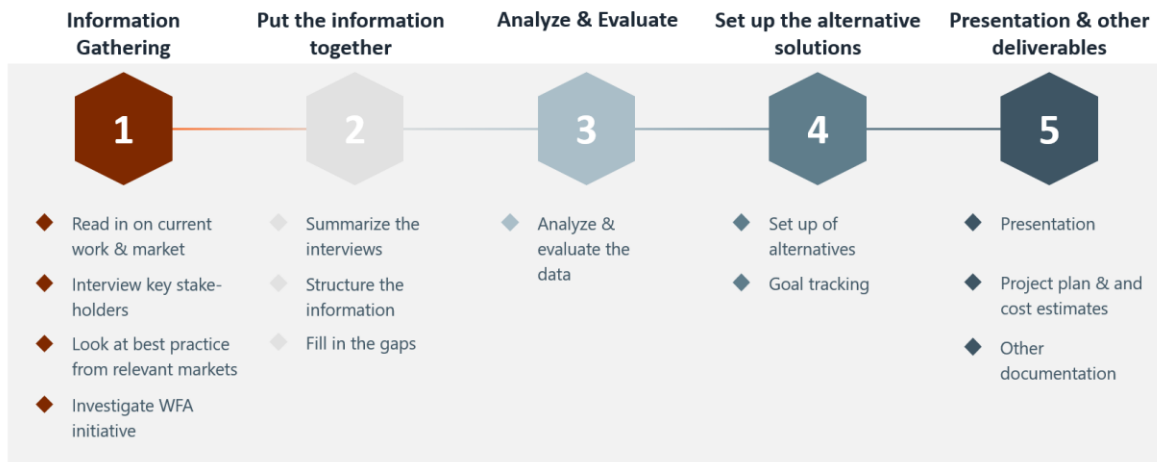
- Screenforce Finland: Anna Lujanen
- The broadcasters: MTV Oy, Sanoma Media Finland Oy Fox Networks Group and Discovery Finland. From the broadcasters we had a group of measurement experts as a task force and the heading of the project was with the Screenforce board of executives.
- Screenforce Finland hired consulting agency Dolores Group: Anette Liljeros and Anders Sahleée.

Below the areas of responsibility within the project.

SCREENFORCE FINLAND	CHANNEL TASK FORCE	DOLORES GROUP
<ul style="list-style-type: none">• SF oversees and assists project (<u>budget</u>, <u>timeline</u>, <u>collaboration</u>), reports to board• Responsible for <u>seeking funding</u>.• Assisting to gather <u>necessary information</u>	<ul style="list-style-type: none">• Responsible for <u>providing necessary information to Dolores</u>• Responsible for <u>guarding that channel interests are met</u>• Available for <u>support and work shops</u>	<ul style="list-style-type: none">• Project <u>lead and execution</u>• <u>Expert analysis</u>• Responsible for <u>keeping to timeline, gathering necessary information and keeping to set budget and timeline.</u>

2.3. Project timeline:

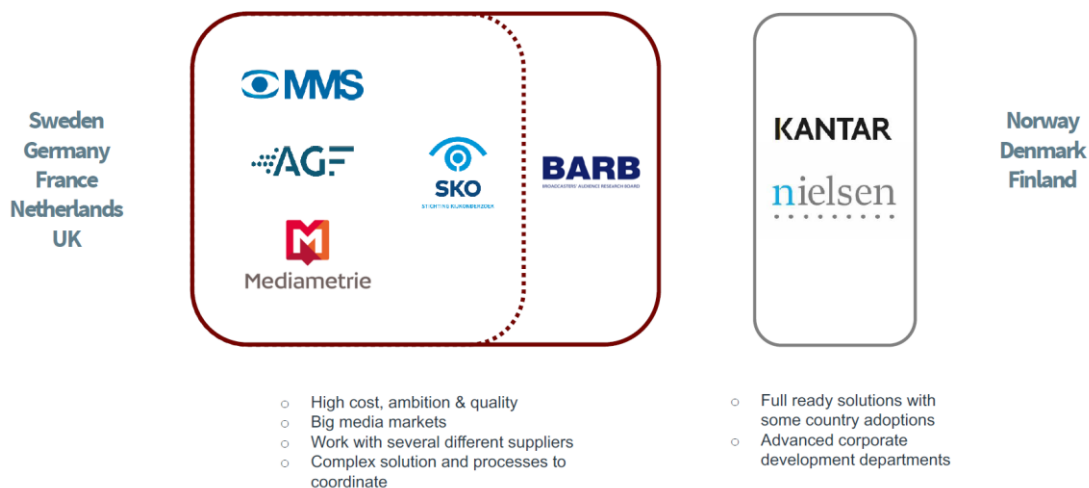
The project started in June and ran for 4-5 months. The final report releasing in October.



Overviews

3.1. Market overviews per country:

We wanted to learn from other markets, naturally the Nordics were interesting because of market similarities but because of recent developments, we also wanted to look at Germany, France, UK and the Netherlands. Many countries seem currently be to in a stage of development.



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Measurement status per market:

Below we have a grid that looks at the status of TV, Online-TV and /or Total TV measurement per country.

	FINLAND	NORWAY	DENMARK	SWEDEN	FRANCE	GERMANY	UK
WHO RUNS IT?	MOC / Finnpanel	MOC	MOC	JIC (MMS)	JIC (Médiamétrie)	JIC (AGF)	JIC (BARB)
TV	Nielsen TAM panel 1000 HH	Kantar TAM panel (A) with 3000 indiv. + Portable meter panel (B) 1500 indiv	Kantar TAM panel with 1200 HH	Nielsen TAM panel with 3000 HH, aprox. 80% also equipped with streaming meter	Mediamat TAM panel with 5000 HH + Portable meter panel 4500 indiv	GfK TAM panel with 5400 HH	Kantar TAM panel with 5350 HH
ONLINE	Kantar's Focal Meters measuring HH devices combined with Census data	Focal Meters measuring HH devices in TV Panel A combined with Census data	Digital meter panel 1000 indiv all devices & webb profiling panel 28000 indiv. Kantar SDK measuring Census	Core Online panel 5000 indiv. meters on all devices + boost panel 40000 indiv. ComScore SDK for census	Online panel 20000 indiv. Singel source panel 6800 indiv. estat Streaming tags	Online panel 15000 indiv. Mobile panel 6000 indiv. Nielsen SDK	Software meters on panelists' PCs and tablets. Are going to be replaced by Focal meter. Kantar SDK for census data
TOTAL TV	Calibrate single-source panel with census data. Virtual panel expansion	Fusion from panel B to A. Demo on census data from panel A. Virtual panel expansion to meet harmonization goal	The digital panel is fused to the TV panel. Web profile panel and census data for calibration	Working with GfK for fusion and modelling processes	Online panel are calibrated with census fused to Tv panel. Single source panel for de-duplication	Online panel are calibrated to the census measurement merged with the TV panel data	Combining single-source panel data with census data in a method called Dovetail, by Kantar
SCOPE	Broadcaster	Total Video	Broadcaster	Total Video	Total Video	Total Video	Broadcaster
TOTAL -BVOD ADVERTISING	no	yes	yes	yes	Using Nielsen DAR online	no	no
COMMENTS	Finnpanel was founded in 1975 and is jointly owned by Nielsen and Kantar	Long contract with Kantar. Continue to push for a Kantar solution	Nielsen new vendor from 2022. BVOD advertising not included in the new contracts	MMS is in an RFP process for 2022 asking for new solutions for all parts of the measurements	Plan for integration of TV consumption on internet devices at home in the official TV ratings 2021	Pilot project for digital campaign measurement with Nielsen DAR	BVOD advertising measurements is in development BARB BVOD planner launched June 2020

Norway

Norway has an ambition to create a currency from their TVOV ad measurement.

- None of the Broadcasters offers commercial campaigns based on total video ratings but urge advertisers to allocate a part of the TV-budget to Online Video.
- Advertisers and Media Agencies are a bit reluctant to the TVOV as a currency (TVOV: TV and online video). Online Video figures have deviation from ad-server data. Partly due to inconsistencies in the handling film code/ Content ID by the market.
- BVOD (Broadcaster Video on-demand) is sold on ad-server data.
- The Agencies use Kantar data, internal tools and AxM to evaluate cross media reach for online video and TV (AxM: AdvantEdge Cross Media).
- Out-of-home panel adds approx. 10% to the TV currency
- There have been discussions with YouTube, but no clear feedback on their interest to participating

“A constant challenge to tag new players/apps coming to the market, one needs to be focused at all times. Having same Content IDs across platforms is necessary, but not easy. Trading platforms make it challenging, including cooperation from those benefitting on the online world.” John Richard Hewitt, TV2

Denmark

In June, it became official that Nielsen will take over the measurements from 2022. BVOD Advertising measurements are not included in the new contact.

- BVOD & Total TV Ad measurement is in the current Kantar solution, but it is not in use by the market.
- BVOD is traded on ad-server data.
- For BVOD ad planning and evaluation the market is using Audience Project.
- A Danish standard for an online contact has been set up. Under 10s 100% complete/ >10s 50%. 100% on screen.

Sweden

Sweden aim for a fully accepted media currency covering all TV and online video viewing on all platforms, screens and in all situations.

- Online Video content measurements since 2011 and online advertising on all devices since 2014.
- Programmatic included on a general level 2017.
- Total TV advertising measurement was launched in January 2017. But the market is still trading on two separate currencies: linear and online video.
- The MMS online measurement of ads is the official trading currency in Sweden.
- The MMS tool for evaluation of total ad reach is not very user friendly, resulting in low usage and knowledge within the market. TechEdge integration estimated to be ready by end of 2020.
- Working closely with YouTube since 2017 to include them in the measurement. First step, content on a general level, as announced in November 2020. Advertising measurement under discussion.
- Both telco and publishers are measured (Aftonbladet, Svenska Dagbladet, Expressen and Dagens Industri).
- MMS has just made an RFP for all different parts of the total measurement

Germany

- AGF Videoforschung (AGF) has a broad scope. BVOD typically adds just a single digit percentage.
- AGF and YouTube have recently ended their five years long cooperation. The aim was to meet the market demand for a common video standard for TV and online platforms and to integrate YouTube into the existing system according to comparable criteria.
- The trading on BVOD is on ad-server data.
- There is no common standard for BVOD advertising campaigns. A wide range of different viewing criteria is in use, depending on the advertiser's / agency's demands.

In June 2019 AGF announced a pilot project for digital campaign measurement with Nielsen Digital Ad Ratings (DAR).

"All marketers of advertising inventory in video platforms can conclude a licensing agreement with AGF governing the measurement and provision of data on a comprehensive basis. Therefore, AGF remains open to cooperating with Google in the future". Kerstin Niederauer-Kopf, AGF

France

BVOD on the big screen is measured on a custom basis. For Online campaign measurements Nielsen DAR is used. Médiamétrie consider Nielsen DAR to be a good solution but wants Nielsen to develop the time measurement (today's standard 2 sec / 50%). France has a long term partnership with Nielsen.

- For total video advertising evaluation and planning the Online and TV data are fused in a model, called XCR, for net reach.
- The trading of BVOD is on ad server data.
- There are plans for integration of TV consumption and online devices at home in the official TV ratings 2021.
- Médiamétrie has collaborated with Google for 4 years. From September 2019, YouTube results are published alongside other online video publishers, this is content only.
- Out-of-home viewing was added to the TV currency in March 2020. Adds are approx 5% despite changes in behavior for the period due to Covid-19.

Netherlands

SKO's total Tv measurement was launched 2016 but the measurements was not accepted by the market and the project was closed-down 2018.

- The VOD was too complex and expensive to solve and the failure of including YouTube and programmatic is pointed out as the main reasons for closing-down the project.
- Another JIC, Digital Audience Measurement (DAM) has taken over the measurement of VOD-campaigns.
- BVOD is traded on ad server data.
- The Dutch Initiative. Netherlands is the first country in the world to issue a tender for total media audience. The RFP is a cooperation between the JIC's for TV, Radio, Print and Online. The next step is fusion of data (panels are partly overlapping), to build cross media data sets for both planning & evaluation

New standard. The RFP should lead to a new, shared standard for measuring and reporting media and advertising reach. The new research must meet a number of basic principles:

- 1) There is a need for more and continuous insight into the cross-media reach and use of media by different target groups; this calls for creating overlap in measurement where possible.
- 2) The research must be future-proof by including new forms of media planning, buying and trading, such as: addressable advertising, programmatic, mobile, SVOD media.
- 3) The collected data on viewing, reading and listening must meet the relevant quality standards. Furthermore, the design and data collection must be fully GDPR and E-privacy compliant.
- 4) The joint measurement should lead to efficiency gains

“It’s not only up to broadcasters to get this job done. It doesn’t bring them extra money on the short term. It takes a lot of budget to have it properly measured.” Michel van der Voort, Screenforce Netherlands.

UK

BARB’s project Dovetail is to deliver deduplicated reach of programs and commercial audiences across multiple screens. They do this by combining single-source panel data with device-based census data through a process called Dovetail Fusion, run by Kantar.

- January 2020, unduplicated reach across TV, tablets and PC’s on programs.
- Total TV advertising measurements is in development.
- Fusion methodology for reporting total TV campaign performance carries the risk of introducing a level of reach inflation unless care is taken in implementation to ensure results are calibrated by panel measurements.
- In June 2020 a planner tool was released, BARB BVOD planner, to help agencies and advertisers to plan total TV campaign performance (linear and BVOD).
- UK is the European test market for WFA initiative: <https://originmediameasurement.com/>
- SKY have adopted and developed NBC cross-media measurements, Cflight. High standard, 100% complete (source: see Appendix, Sky presentation, ASI-conference).

BVOD & Total Ad measurement Nordics: Commercial usage

No Nordic country has a true currency, though bundled products are traded (two currencies). Below is a summary of the Nordic markets through a commercial perspective:

Insights:

- No Total TV Ad measurement used as a true currency in the Nordics.
- Common BVOD measurement used in SWE for currency and DK for planning.
- Total TV ad measurement used for evaluation in SWE and NO.
- Norway continue to push for Kantar solution, TVOV, to our understanding.
- DK not clear what future direction is, looks like a solution with at least partly outside TV measurement set-up.
- Sweden discussing about Total TV as currency, in RFP process, MMS part of WFA project in SWE.

3.2. Vendors: Different solutions and scenarios:

Each market has resolved the Total TV elements in a different way, the following is to map out the different solutions available currently.

	CFLIGHT	BARB PLANNER	RAM	AUDIENCE PROJECT	KANTAR	NIELSEN
SOLUTION	Unification of impressions across SKY's platforms at a campaign level	Modelling design by RSMB Devices are converted to people using Dovetail and other information	Big online panel that overlap with TAM panel	Big online panel witch can be merged with tv data in different ways	TAM panel with Focal meter on HH devices Census data Virtual panel expansion	TAM panel with Streaming meter on HH devices. Census data Virtual panel expansion
ACTIVE MARKETS	Inhouse solutions for SKY and NBC	UK	None,new solution	DK,FI, UK, Germany	DK, NO, UK	New solution in DK
LEVEL	Planning	Purley planning Updated quartley	Could be both planning + trading	Could be both planning + trading	Could be both planning + trading	Could be both planning + trading
COMMENTS	Not same solution for NBC & SKY High standard: 100% complete	Integrated in to TechEdge planning tool K2. Beta launched June 2020	Interesting online and modeling solution. Works with script that instead of cookies, automized tagging. Time is currently missing	Smooth tagging process ; good and relevant discussion around tagging and ID process	Active on many markets. DK and NO.	

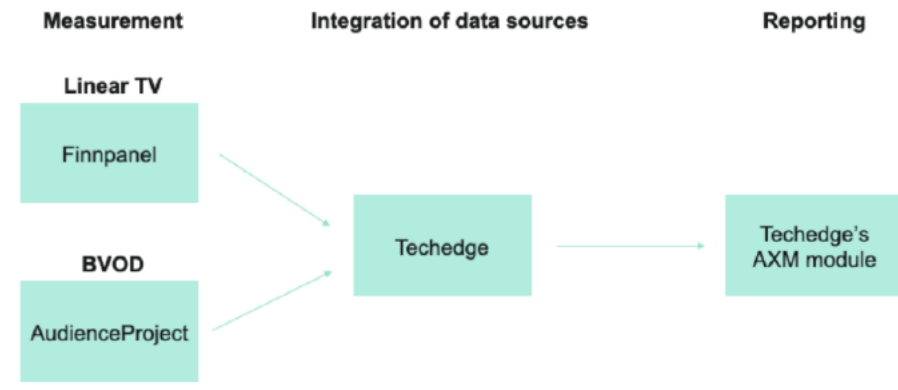
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Total TV advertising set ups:

The following scenarios picture the possible vendors and what the solutions would look like for the Finnish market.

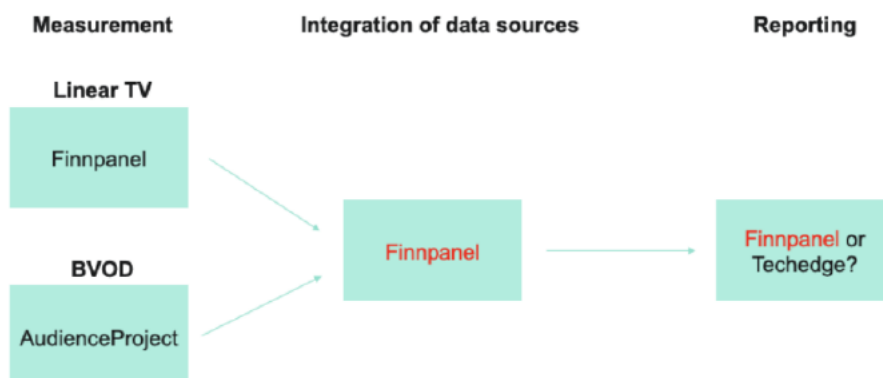
Audienceproject:

Total TV advertising set up:



- Using current TV data
- Setting up a BVOD measurement ; FIN standard
- Integrate data for total TV ad by Techedge
- 3-6m tech implementation AP + pre work and process
- implementation ; est. 6-12m
- AxM license cost per broadcaster

Total TV advertising set up, co-op with Finnpanel

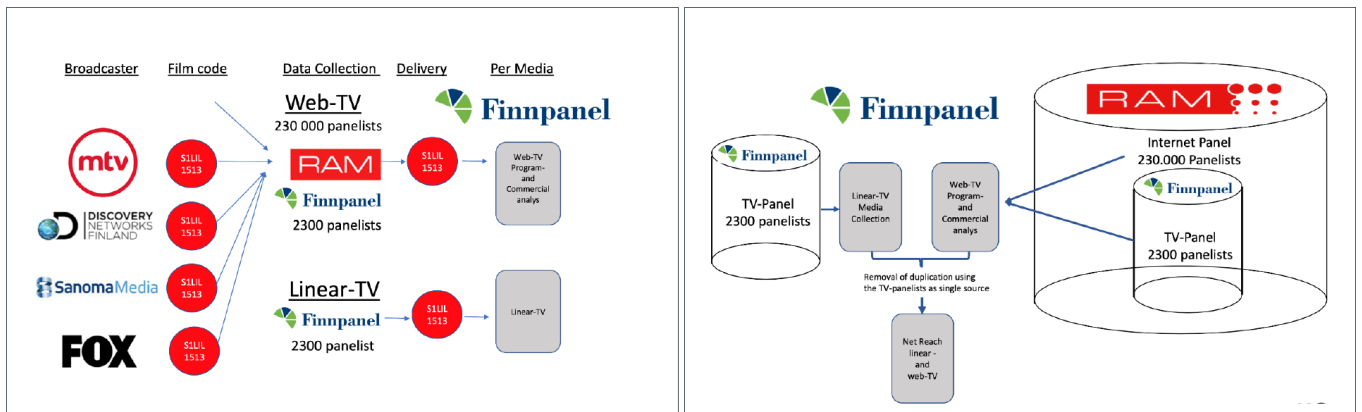


- Use current TV data
- Set up a BVOD measurement ; FIN standard
- Integrate data for total TV co-op with Finnpanel. Needs further investigation.
- 3-6 months tech implementation AP, risk of additional integration time with Finnpanel +pre work and process implementation
- Time for Finnpanel modelling work x months. Needs further investigation
- Rough estimate for implementation time, 6-12 month + x months for modelling.
- Finnpanel cost for integrating data? Needs further investigation.

Audienceproject summary:

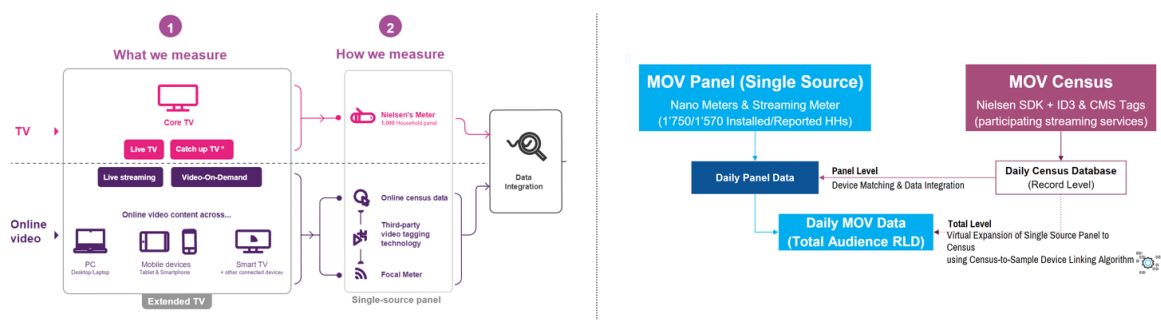
- Audienceproject and their products are well-known by the market. Have references from other markets.
- Audienceproject and TechEdge AxM set up for cross media evaluation well-know in the market.
- Interesting suggested solution. Developing the current AP solution into currency in co-op with Finnpanel (not yet validated by Finnpanel).
- Smooth tagging process ; good and relevant discussion around tagging and ID process.
- First input from Audienceproject regarding time plan and rough cost estimate is promising. NB rough estimates!
- Got good documentation around their suggested solution.
- Can it be developed stepwise? 1st launch as planning, then develop into currency with Finnpanel as step 2.

RAM solution



- Overall set-up is interesting.
- To our understanding a smooth tagging solution, cookie-less part using broadcasters 1 party id.
- Can't measure time and completion rate right now. But could be developed.
- Questions around internet panel composition and quality.
- Not in place in other markets, to our knowledge
- Need to interact with Finnpanel and tag TV panel.
- Finnpanel intergration needs further investigation.

Kantar/Nielsen comparison



- Similar solutions. Single source panel with router meters on HH devices, Census data with SDK:s and virtual panel expansion.
- Nielsen online advertising solution has not been presented for the project.

3.3. Market insight: other countries and potential vendors

As the project progressed, we found that Finland is not so far behind regarding total TV ad measurement. Total TV advertising currency is not used in any market, as we define it. The aim for a currency is an ambitious target and far more complex than we could have anticipated at the start of the project. Many countries don't have joint BVOD currencies but a lot of countries are on the move towards Total TV or Total Video measurement. Whom is in the drivers seat tends to vary:

- UK launching BVOD planner and planning for last part of Dovetail, Total TV advertising 2021. (Kantar)
- DK announcing new measurement from 2022 (Nielsen). Total and BVOD advertising not included.
- SWE in RFP process for 2022, total measurement set-up.
- France plan to include in-home online in official TV ratings from 2021. (Mixed)
- Germany AGF project with Nielsen DAR around total TV advertising measurement, started 2019. (Mixed)

There is no true "off- the-shelf" product. All potential products must be tailored somewhat for you needs and market. Also, not too many potential vendors on the market. There is constant development in this area of measurement. It is hard or impossible to get cost input from other markets, all agreements seem to be under NDA. The situation with Finnpanel in Finland representing both Kantar and Nielsen is complex. Total advertising and BVOD solutions by Kantar in Norway & Denmark are not used by the market as trading currency, at least not how we understand and define currency. Also interesting to follow how the WFA initiative is progressing. Test markets in UK, US and test also launched in Sweden.

3.4. Interviews and analysis:

We interviewed Marketing Finland and three media agencies, in order to get an advertiser approach. Marketing Finland is part of the WFA network and aware of both international and local advertiser discussions on TV measurement. We also interviewed the broadcasters in Finland, to gather a general market broadcaster view, we needed to check that the broadcasters were aligned in all topics. The only issue of alignment was on the issues surrounding Total Video and other players.

We had good discussions with Google, we discussed their measurement developments in other markets. They are the closest to the broadcasters when you compare to the other video players, from a viewability stand point.

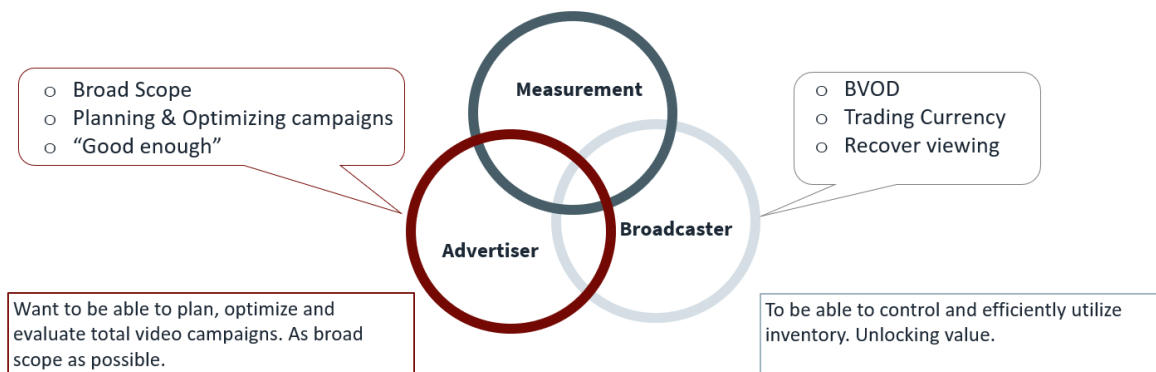
Google 3rd party measurement activities in selected markets:

- Develop or join 3rd party measurement. Independent & valid.
- Must scale, do not act local.
- Build private safe infrastructure. Tagless.
- The scaled measurement programs existing: YouTube Measurement Program, Google Measurement Partners, Ads Data Hub.
- Early involved with the WFA initiative

“As a significant ad-funded video platform worldwide, YouTube should of course be represented in industry measurement systems. Advertisers want and expect it of us, and we’re happy to engage in discussions of how to achieve this in a realistic way. We enter into such discussions with a set of requirements. Most importantly, any solution we work with has to be privacy safe for our users, and it has to be transparent and future proof.” - Robert From, Google Finland.

Advertisers & media agencies interview summary:

- Advertisers and media agency's don't demand a total TV currency. A total reach measurement is good enough for them.
- It is important to get going. Action plan and timeline for total video is required. Too slow → Risk of parallel measurement set-ups.
- They want a total video scope in the long run but understand that in order to get started TV + BVOD is a good scope to begin with.



3.5. WFA status:

The WFA initiative has released two documents (WFA website):

- 1) The WFA Industry Framework for Cross-Media Measurement
- 2) The technical proposal/blueprint by the platforms

- EGTA driving the Broadcaster perspective
- Google & FB have put forward a 1st draft of a cross media model.
- UK & US test markets. Sweden, Germany, Italy, Spain, Holland have started committees and testing.
- Still early stages of discussion.
- European JIC's collaborates and argue for a scientific peer review of the proposal.
- MMS participate in the Swedish WFA work, driven by the Swedish advertiser organization.

"There may be lots of obstacles ahead still but TV (as in total video) and online platforms MUST at one stage sit at the same table and together - if only - try and design answers and solutions that are respectful of each other's reality and allow advertisers to form - at last - a more unified picture of the efficiency of their campaign (if only solve the de-duplication problem that is so much hindering our industry). Needless to say that TV's expertise in this process is of vital importance and that broadcasters' voice must be loud and clear." - Katty Roberfroid, Director General, EGTA (association of television and radio sales houses).

3.6. Total Video Scope

Total Video advertising spans all video advertising on screens and all streams, any content, any device. The total video advertising scope means that other video advertising medias could also be involved, to give the advertiser a more unified way to measure multiplatform video advertising. However, TV can only be responsible for broadcast advertising. The WFA initiative is more focused on the total video scope, with broadcaster advertising only being a piece of the measurement puzzle.

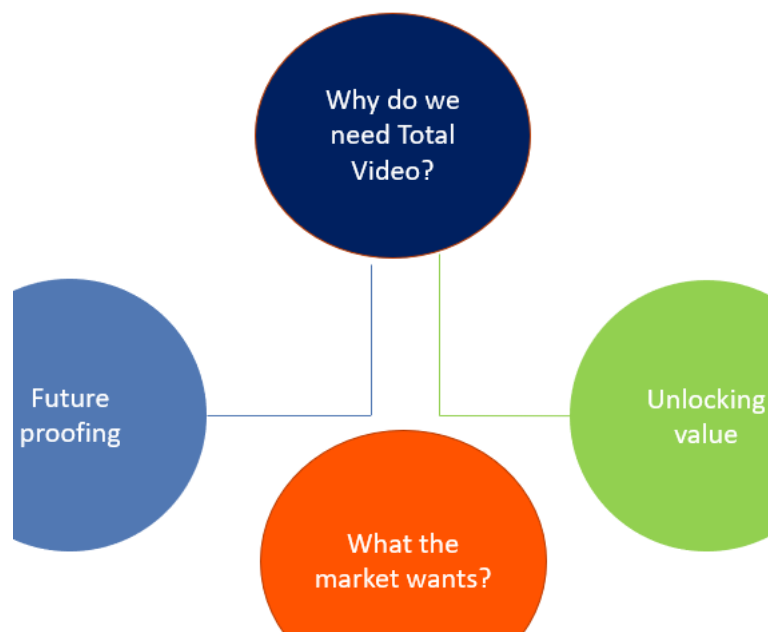
	TV & BVOD	Other Online video
Gold standard	+	-
Premium content	+	-
Accountability	+	-
Completion rate	approx. 95%	approx. 60-70%
In screen	TV + / BVOD -	-

- TV measurement and currency is "gold standard" and it is highly accepted on the market, transparent and proven.
- Important to set a quality standard for BVOD and push for like-for-like comparison.
- It would be wise to choose a BVOD scope for the Broadcasters measurement. This is a more realistic way forward, while gaining learnings from other markets ambitions and attempts.
- Broadcasters should handle Total video but be pragmatic.
- Broadcasters should solve the total video issues out-side the Broadcaster measurement set-up but take care of the data that they can bring to the table.
- Advertisers need cross-media measurements, and they will be developed and used. TV will be evaluated more and more according to these new measurements. This in turn will affect what part of their spending Total TV will receive.
- It is important for the broadcasters to be a part of the process and prove a willingness to solve the scope of the Total video measurement
- Joint broadcaster interaction is needed regarding Total video measurement in the WFA initiative.

How to achieve a currency?

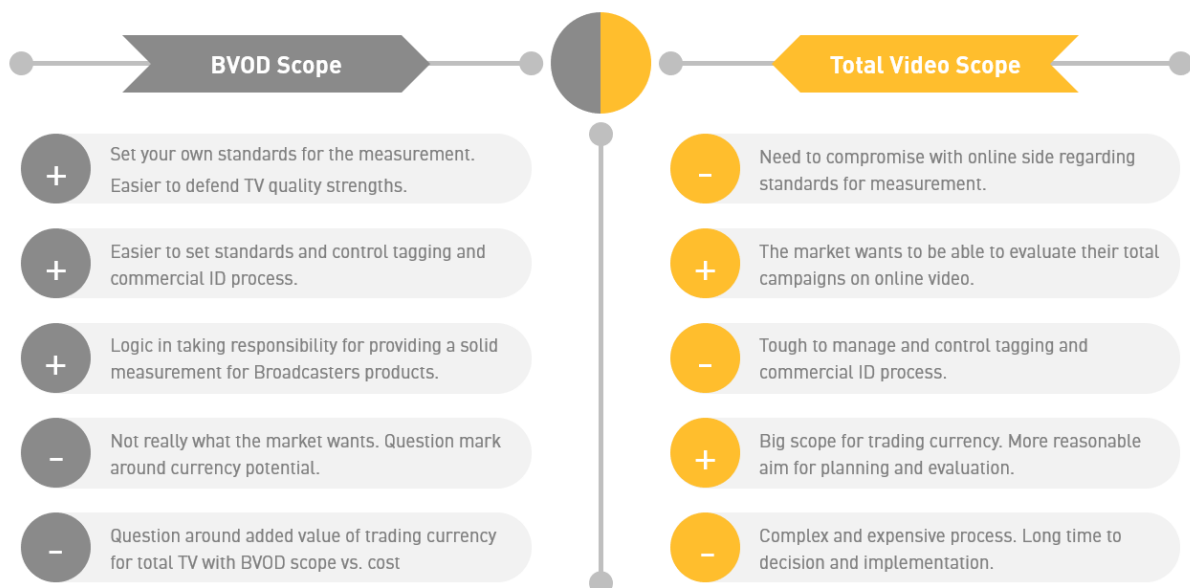
What needs to happen for a currency to exist? It needs to unlock value for the market players: media agencies and advertisers.

The market hungers for a Total video -planning tool and thus possibly a currency but understands that Total TV might need to happen first.



A unified common measurement leads to:

- Validated & reliable media choice analysis for advertisers
- Common view on results
- Enables optimization of KPIs – reach, frequency, affinity etc.
- Supports and eases trading



3.7. Overall insights:

- TV is a strong product. High reach, high quality environment, brand safe and good and accepted measurement in place.
- TV measurement and currency is "The gold standard". It is highly accepted by the market, transparent and proven. Making it important to defend.
- Possibilities to set quality standards and be in the driver seat.
- Some markets have long going development with Google / YT: Sweden and France for example.
- The ambition for the WFA is total video.
- If the broadcasters are too protective, Finland can end up with parallel measurements with less control, like for UK / BARB. This is a real threat with diminishing sales.
- Total Video can be handled outside the broadcaster measurement, for example within the WFA framework solution, where TV & BVOD are included as a part of the total scope.
- Important to secure a process for tagging and content ID. A balance between high quality and a pragmatic, user-friendly solution.
- Everyone is talking about cookie-less and tag-less. No solution yet up and running.
- Both the process around the measurement and the "buy-in" from the market are just as important as the measurement itself.

Results

After analysing the gathered market and vendor information, as well as the interviews. Dolores recommended 3 options to be looked at simultaneously if the target focus is on the target of a true Total TV ad currency.

4.1. Analysis:

There are three options of proceeding towards a Total TV ad currency:

- 1) **Full RFP - for total measurement set-up:**
 - Not a must if the need is to just add total TV ad measurement
 - If you want to evaluate your options for the total set-up, cost quality, future proof etc.
 - Need to include YLE
 - Long process 2y+ ; Resource demanding
 - What will it lead to? Complexity with Finnpanel representing both Nielsen and Kantar.

- 2) **Kantar extension with total ad measurement:**
 - Go forward with the Kantar solution for total TV advertising currency.
 - A natural next step given current set-up. Faster up and running than RFP. 1y+
 - Learnings from DK and NOR ; secure tagging & ID process.
 - Need to formulate a clear specification of what solution is wanted and collaborate with Finnpanel
 - Acceptance from the market? Must have buy in.
 - Recommend more learnings from DK and NOR

- 3) **External add on with BVOD and total TV measurement**
 - Set up external BVOD measurement; Set a Finnish standard for BVOD.
 - Create total ad measurement by connecting BVOD ad with current TV ad measurement.
 - Could be done outside Finnpanel or in cooperation with.
 - Faster and can be launched in steps. 1)BVOD 2) Total planning 3)Total currency
 - Need to do a good specification of requirements for a solid tender process.

4.2. Scenario analysis:

Scenario 1) Full RFP: Why a full RFP? Its only through an RFP process you will get a clear picture of the market, your alternative sand cost. A full RFP helps the broadcasters forces you to create a common view for the future TV measurement in Finland. Though a full RFP is not a must for setting up a total ad measurement.

Scenario 2) Kantar extension:

If we look at the Kantar extension, it would basically be the Norwegian solution minus the OOH viewing panel. The timeline would be 3-6 months to implement according to Finnpanel and Kantar (after that the broadcasters are tagging their advertising). This needs to be investigated more and formalized, write a specification for requirements

Scenario 3) External add on with BVOD and total TV measurement: Use current TV measurement set-up for linear TV and add a joint BVOD measurement, creating "gold standard" for BVOD (could be: Audience Project; RAM ; ComScore etc). Look into connecting these two data sets to create total-TV measurement for advertising. This could be developed quite fast and in steps.

4.3. Recommendations:

PATH	TIME	FLEXIBILITY	COST	CURRENCY POTENTIAL	TOT VIDEO POTENTIAL
Full RFP for total measurement set-up					
Kantar Extension					
Add On Solution					

- Start working with the framework for RFP and preparation for Kantar extension and Add on solution.
- Set up a working group. Working group should consist of by 1-2 from each TV house. A measurement expert, a commercial expert, seniority. Mandate and clear framework for decisions. Set up within the framework of Screenforce. Working group responsible for driving the work via different paths forward.
- Hire an external consultant for expertise and leading the work on RFP and specifications for BVOD and total TV ad measurement, to help with evaluation work. Adding expertise, project leading and outside perspective.
- Talk to MMS and draw learnings from their current RFP process.
- Talk to BARB around their work with Kantar, talk more with Norway (MOC; Kantar) around their learnings from the Kantar solution and Denmark learnings need to be more investigated.

Secure involvement and buy in from market:

Invite representatives from media agencies and advertisers to constructive discussions. Maybe set up a permanent forum? Make this a joint question. Reference group with representants from the market. Discussion the different options. Discuss WFA and cross media measurement. You have a common interest in setting up well functioning market for the future.

WFA and total video measurement:

- 1) Set up working group for Broadcasters handling total measurements.
- 2) We recommend Screenforce to also:
 - Start discussion with You Tube in Finland regarding WFA and total video measurement.
 - Interact with EGTA and within Screenforce network.

4.4. Summary:

- Important to get started. Go **for flexible solution** that have the potential of being developed in different future directions. The most complex solutions, with many different suppliers, are all JICs. Find a reasonable level of complexity for your solution.
- **Act on parallel tracks. Make proper allocation of resources. Get external help and add** your joint expertise. From what we learned you have access to very good expertise at you companies.
- It can be good to make the **BVOD ad solution separate, with clearly defined standards.**
- Even there is a BVOD scope, it is important to take **a common approach to how to work with total video and cross media measurements. Ensuring the high quality of TV comes out well.** TV needs to align on joint way forward regarding WFA and total video measurement and protect quality of TV measurement.
- **Secure the tagging and commercial ID process. Same ID across all platforms. Must handle to tag every new player/app. Cooperation with the market and** must have a clear, simple method.
- Preferably a **tag-less / cookie-less process**, there is no one available right now. However, the ambition should be that, solutions that make it possible in the future should be rewarded.
- **Representativeness in the panel.** In a single-source panel, non-TV households should be represented. For an ad-on online panel, representativeness and data quality need to be secured.
- Make sure you **own and control the data.** Suggested together (within Screenforce). **Transparent. Share all data with each other**

4.5. Next steps:

Screenforce Finland board of executives and broadcast house will evaluate the best possible way forward for the Finnish market.

It is clear the issues and possibilities were much more complex than originally anticipated. Many developments are happening globally and there are many values to be weighed for the decision of how to proceed. The fact that there is no no true “off- the-shelf” product or successful learnings, makes the decision more difficult. The goal remains the same but we need to continue to learn from other markets, , global developments and discussions.

5. Appendix

5.1. Interview list (interviewed June- August 2020)

The information for the project was gathered mainly through industry expert interviews and market examples but also through researching articles. The summaries may be from several sources and do not necessarily directly reflect the interviewed sources view.

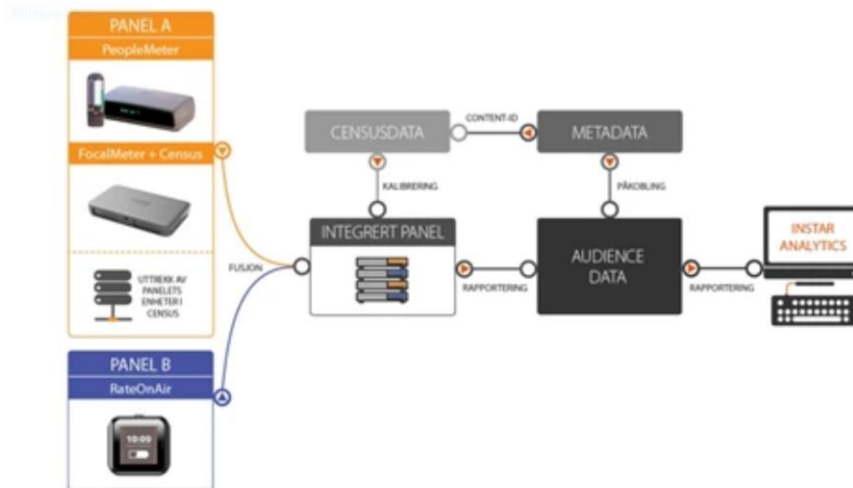
Company / Organization	Who
MTV	Saku Sahramies
MTV	Taina Mecklin
MTV	Outi Rekola
MTV	Pauli Jäämies
Sanoma	Kati Alijoki
Sanoma	Tero Huovila
Sanoma	Tina Åström
Discovery	Tea Hynynen
Discovery	Elina Valtia
Discovery	Leah Hooper
Discovery	Sami Kumpula
FOX /Disney	Arild Sietner
FOX /Disney	Theis Heitmann
FOX /Disney	Alexander Nielsen
Dagmar	Katarina Uljas-Ahl
Omnicom Mediagroup	Jirka Rautavirta
Dentsu Aegis Network	Tuomo Sinkkonen
Finnpanel	Lena Brun
Marketing Finland	Riikka-Maria Lemminki
You Tube	Niels Marslev
You Tube	Rober From
Sweden, MMS	Magnus Anselhem & Pirjo Svedberg
Norwegian Measurement	John Hewitt
Screenforce Netherlands	Michel van der Voort
BARB	Jim Jarrett
EGTA	Katty Roberfroid & Anders Rune
Sweden, TV4 / Telia	Mickael Ekelöv
Kantar Norway	Jörn Leipart
Nielsen Denmark	Chantale Coulombe
MMF	Liisa Lundström
Germany, RTL	Robert Schaeffner
France, Médiamétrie	Julien Rosanvallon
RAM	Björn Engwall
Audience Project	Brian Larsen
Techedge	Kaspar Juul
IPSOS	Jim Ford

5.2 Materials:

- **EGTA insight:** Advances in Hybrid TV Audience Measurement.
http://egta.com/uploads/000_publications/2020_egta_insight_vam.pdf
- **TV Glossary by the Global TV Group:** http://www.theglobaltvgroup.com/wp-content/uploads/2020/09/qtvg_tv_glossary.pdf
- **Presentation:** ASI conference, November 2019: NBCUs Kavita Vazirani and Sky Uk Lucy Bristowe
- **The WFA Initiative:**
- <https://wfanet.org/leadership/cross-media-measurement>
- <https://wfanet.org/knowledge/item/2019/10/04/Global-advertisers-launch-drive-to-establish-cross-media-measurement-principles>
- **Press releases (markets):**
- <https://www.isba.org.uk/news/global-advertisers-unveil-a-collaborative-new-approach-to-cross-media-measurement-1/>
- <https://www.nielsen.com/dk/en/press-releases/2020/historic-milestone-for-the-future-of-danish-cross-media-video-measurement/>
- <https://wfanet.org/knowledge/item/2020/05/18/Swedish-ad-industry-join-forces-to-develop-standards-for-media-buying>
- Country information details follow.

5.3. Country Information

Norway:



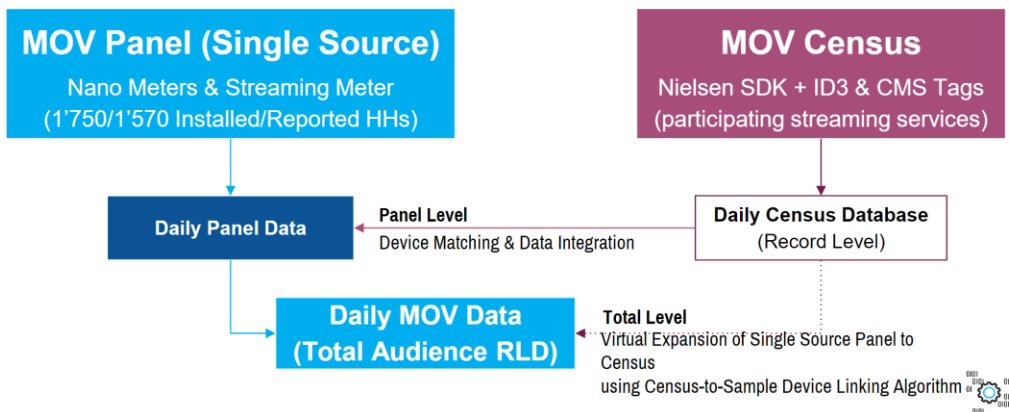
- TVOV launched January 2018, contract with Kantar until 2028
- Two panels that merge into one integrated panel.
- Panel A. 3300 people measuring broadcast in-home and online viewing with Kantar Media People Meter, Focal Meter measuring all HH devices and tracking of Census data.
- Kantar SDK 's
- Panel B. 1500 people measuring Out-of-home broadcast viewing with portable meters. Panel B is fused to Panel A.
- Online viewing in Panel A is calibrated towards census viewing levels using a virtual panel expansion

Denmark:

KANTAR

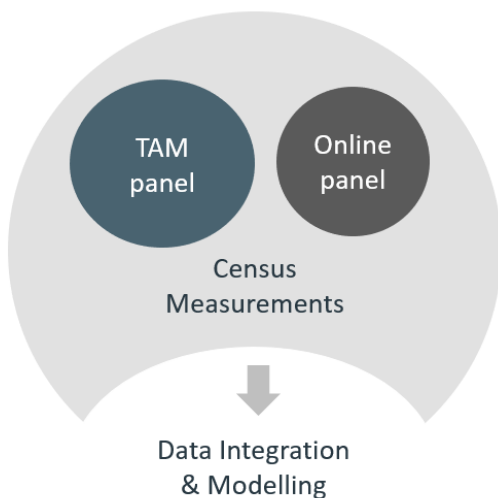
- Kantar, Total TV measurement, 2017-2022
- TV panel with 1200 HH
- Two Online panels. A Digital panel with 1000 persons measuring PC, tablets and smartphones using Kantars Virtual meters (Software meter). A web profiling panel, cookie based with 28 000 people covering all devices. The web panel is used for additional profiling, niche behavior and calibration.
- Kantar spring tags
- The digital panel is fused back to the Tv panel.
- The Web-panel and Census data from Broadcaster are used for calibration.

- MOV, Measurement of Viewers, 2022-2026
- Single source panel 1750 HH
- Online with Streaming meters measuring HH devices and Nielsen SDK for Census
- Online advertising measurement is not included in the contract with the Danish MOC



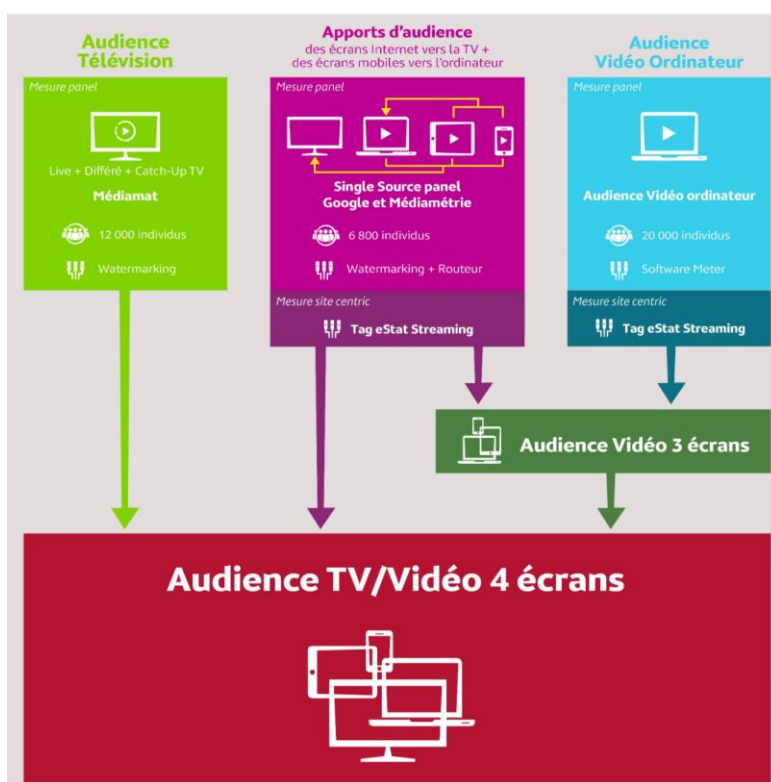
Sweden:

- MMS, JIC for TV and Online Video measurements
- Nielsen TAM panel 3000 HH, approx. 80% the households have Nielsen’s Streaming meter installed
- Core online Kantar panel 5000 person measuring all devices and a boost panel with 40000 person
- Census data with ComScore’s SDK
- Working with GFK for fusion and modelling processes for Total TV
- Total Advertising measurement since January 2017



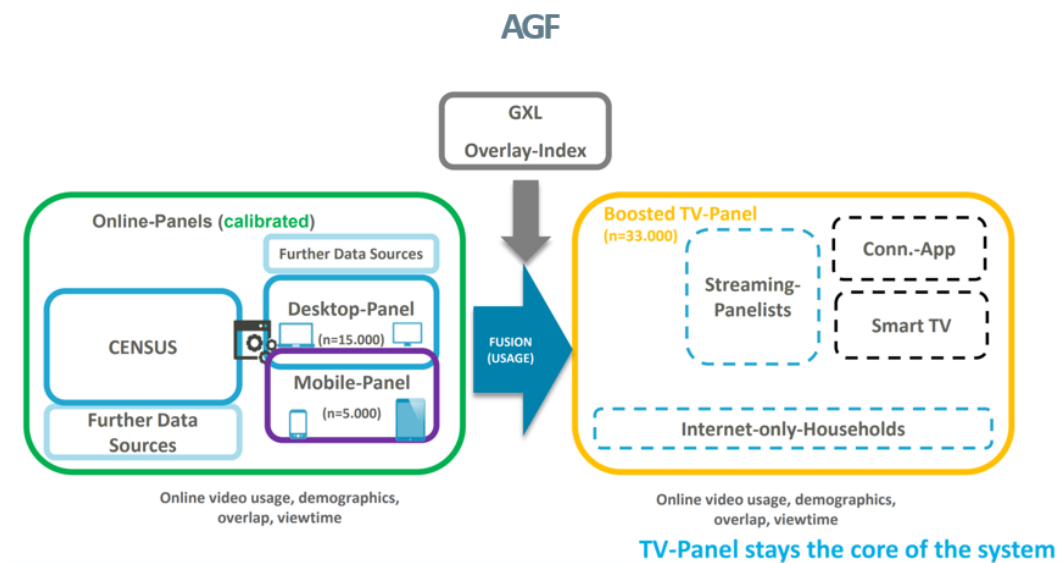
France:

- Médiamétrie, JIC for TV, Radio & Internet measurements.
- Total TV (not ads) across all screen types since 2016.
- TV panel 5 000 with households.
- 4 500 ind. with portable meters measuring broadcast viewing out-of-home
- On-line panel with 20 000 people. Long term partnership with Nielsen.
- Single source panel 6 800 person. Developed in partnership with Google. TV measured by TAM meter and Online with Router meter.
- Mediametrié eStat Streaming tags for census data
- For total Video, the Online panel are calibrated with census and fused to TV panel using single source panel for de-duplication
- Online advertising is measured with Nielsen DAR



Germany :

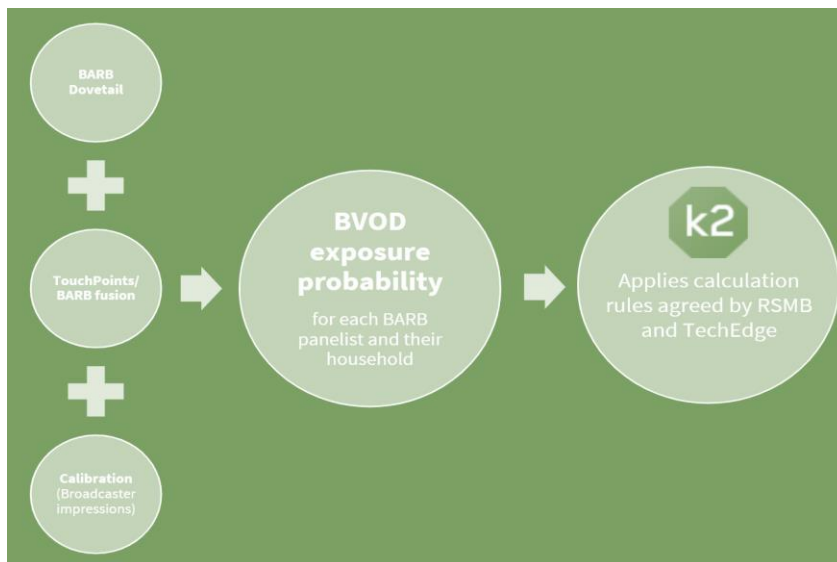
- TV Panel 5 400 households using GFK 's meter
- Two On-line panels: Desktop panel with 15 000 people and a mobile panel of 5 000 people.
- Census data with Nielsen SDK
- Single source components: Router meter & APP
- Data fusion, from On-line panel to TV panel
- The Online advertising measurement is not included in the solution.



UK:

BARB BVOD AD PLANNING

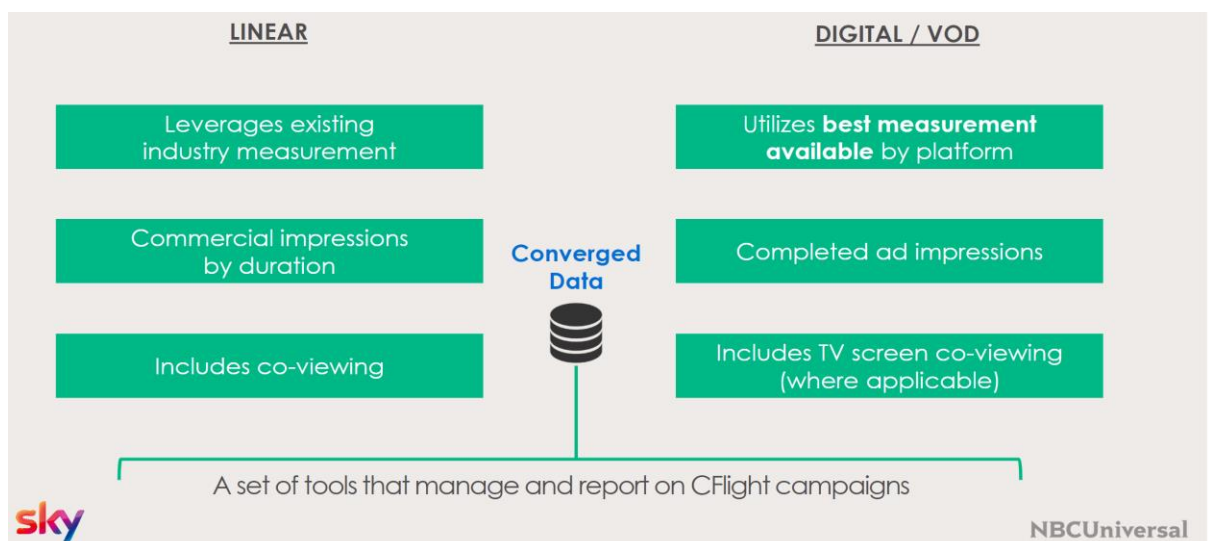
- Purely for planning
- Reach & Frequency: BVOD, linear and combined
- Modelled data
- BVOD impressions delivered to BARB target audiences
- Updated quarterly
- Integrated in to TechEdge planning tool K2
- Assumes that impressions delivered are impression planned



- Prototype created by NBC as a marketing initiative for the Olympics
- Unification of impressions across SKY’s platforms at a campaign level
- Modelled total, linear and census
- Online on household level
- High standard, 100% complete
- Methods are not fully transparent

CFLIGHT:

- Prototype created by NBC as a marketing initiative for the Olympics
- Unification of impressions across SKY’s platforms at a campaign level
- Modelled total, linear and census
- Online on household level
- High standard, 100% complete
- Methods are not fully transparent



- Source: ASI conference, November 2019: NBCUs Kavita Vazirani and Sky Uk Lucy Bristowe

5.4. Terminology:

- **AVOD: Advertiser-Funded Video On Demand (AVOD).** Any type of VOD service that is free to the user and funded by the inclusion of advertising in between programs, movies or clips.
- **BVOD: Broadcaster video-on-demand.** TV watched online is BVOD. It can be watched either live (via live streaming) or on-demand and is available via set-top box, personal computer, mobile device or connected TV. BVOD content is professionally produced, broadcast-quality and includes TV shows and movies, archived shows and BVOD exclusives and originals.
- **AxM: AdvantEdge Cross Media**
- **JIC: Joint Industry Committee**
- **MOC: Media Owner Committee**
- **Total TV: Broadcasters and both of their “distribution channels” linear and online (live and BVOD).**
- **TRP:** A target rating point is a metric to measure impressions in relation to the number of people in a specific target audience for an advertisement. It is used specifically in TV media advertising and is the trading currency.
- **TVOV: Television & Video Rating.**
- **Viewability:** A measure of how many pixels of a video advertisement can be seen, how much of the screen it takes up and for how long it is seen. Viewability is an advertising metric that aims to track only impressions that can be seen by users. Unlike online-only platforms which are hampered by scrolling, TV ads are 100% viewable on every device.