



# ***“A Word From Our Sponsor...”***

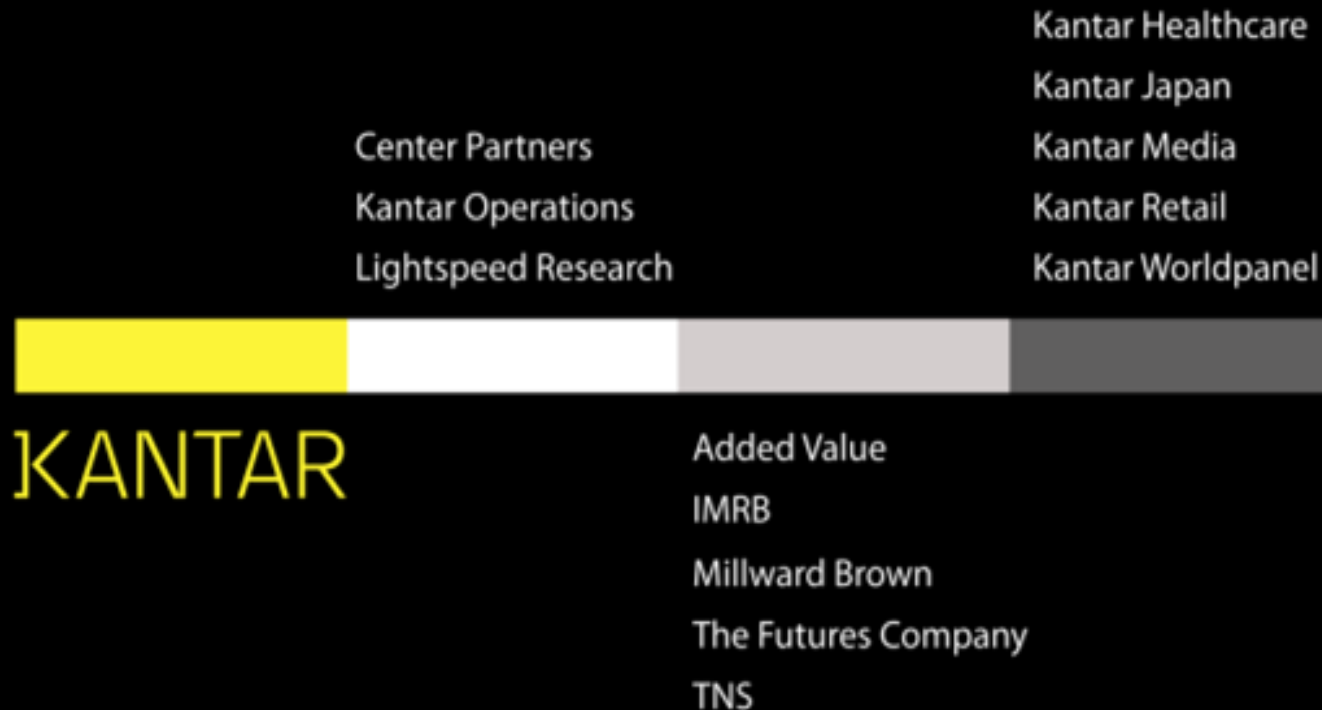
## **Measuring The Value Of Commercial Audiences**

Jeff Boehme  
*Chief Research Officer*  
*Kantar Media Audiences, North America*

# Kantar Snapshot

## Corporate Overview

World Leader In Consumer Research...  
...TV Measurement in 65 Countries



# Kantar Media Audiences

## Measurement Technology



# Kantar Media Audiences

## What Is Return Path Data?



Return Path Data (RPD) is any user activity collected from a digital device defined by a start time and a duration returned to the platform provider

- Second/second precision
- Passive collection
- PI-compliant
- Device-specific
- Larger samples
- Cross-device

# Kantar Media RPD Benefits

## Anonymous Respondent Level Audience Metrics

- Commercial & Promo Measurement
  - Ratings, retention & tune-away
  - By network/program
  - Category/brand
- Product Placement/Contextual Advertising
  - Track on-screen tuning to content
- Precision Metrics
  - Respondent-level second/second tuning
  - Competitive performance
  - Content analyses
  - Live/Time-shifted
  - Consumer Segments
- Advanced Audience Measurement
  - Interactive/Addressable/T-commerce advertising
- TV Effectiveness & Engagement
  - Behavior segmentation - matching tuning to purchase behavior



# Where Is Media Measurement Going?

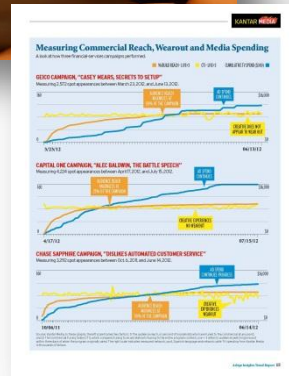
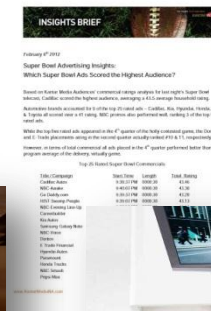
Requirement	Traditional (Meters)	Advanced (RPD)
Broadcast & established networks	√	√
Emerging channels/regional/ sub-channels/platform measurement	<b>X</b>	√
Commercial ratings/ad avoidance	<b>X</b>	√
Promo Evaluation	<b>X</b>	√
Behavior Segmentation	<b>X</b>	√
Advanced advertising (Interactive/T-commerce/addressable)	<b>X</b>	√
TV Everywhere	<b>X</b>	√



# Commercial Measurement Analytics

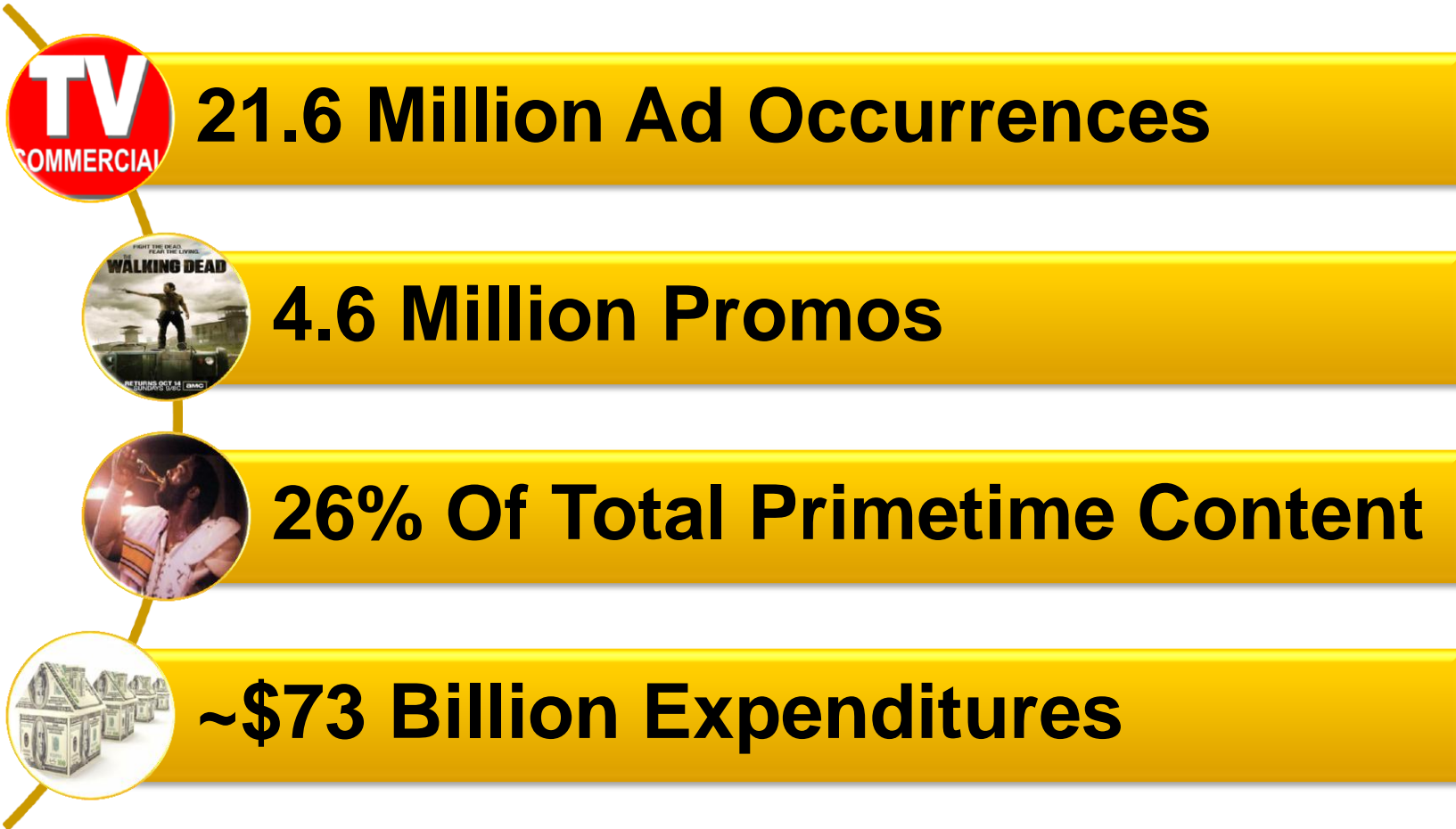
## Recent Industry Activity

- ARF White Papers
- Commercial Tuneaway
- Super Bowl Ad Effectiveness
- High Definition
- State Of The Union
- “Beyond Demographics”



# The Current TV Commercial Business

## Context: 2012 Key Numbers



Source: 2012 Kantar Media Intelligence



# The Issue: Ad Avoidance

**Commercial Audiences Are 13% Lower Than The Programs In Which They Appear**

***Live/+3 Total Day  
Commercial Tuning***



***Commercial Avoidance  
Potentially  
Costs Advertisers ~\$9 Billion***

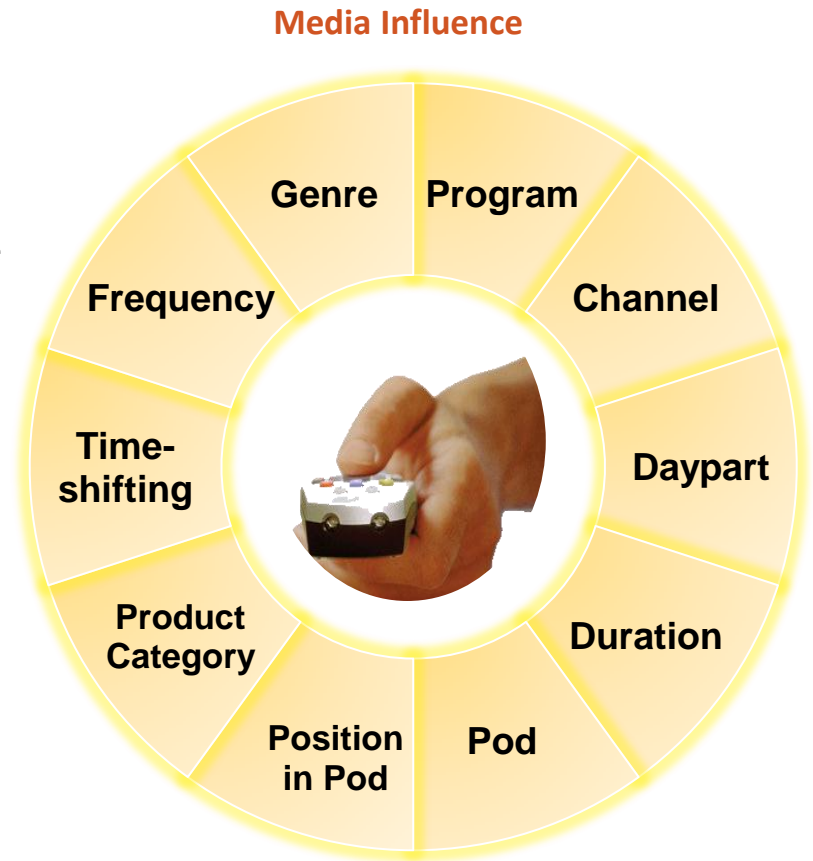


Source: Kantar Media Audiences RPD 5/12; Kantar Media Intelligence 2012

# Kantar Media RPD

## Provides News Metrics To Measure Ad Avoidance

- RPD provides second/second tuning
- Media placement can now be evaluated across 10 measurable influences



Source: Kantar Media Audiences RPD

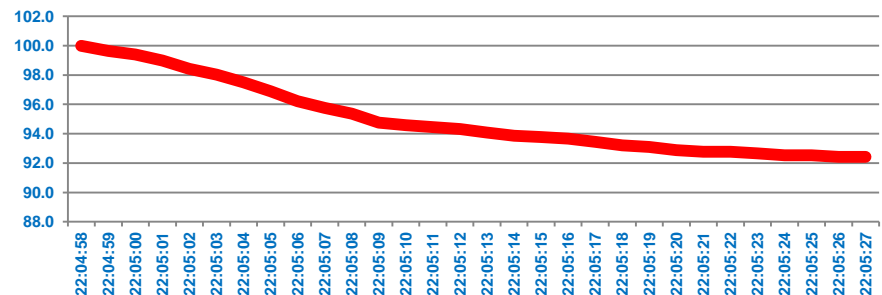
# Kantar Media RPD Services

## Advanced Metrics To Manage Commercial Avoidance

### Measuring Commercial Behavior

#### Tuneaway

- Second/second
- Measures the holding power of a commercial at the first second
- The percentage of seconds *not tuned* compared to the total seconds based on the audience tuned at the first second



Source: Kantar Media Audiences RPD

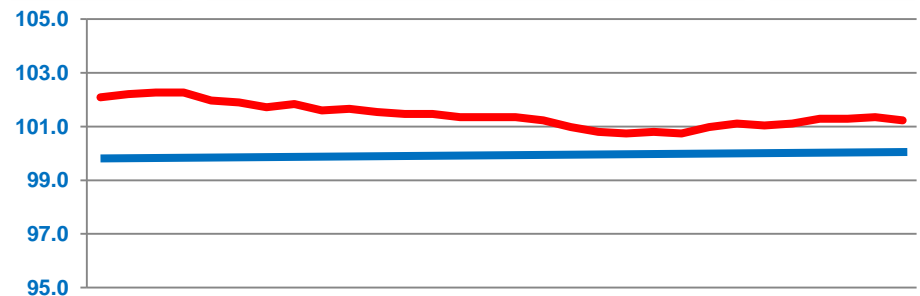
# Kantar Media RPD Services

## Advanced Metrics To Manage Commercial Avoidance

### *Measuring Commercial Behavior*

#### Commercial Tuning Index (CTI)

- Second/second
- CTI measures the holding power of a commercial for all seconds tuned
- Ratio of a commercial's average audience *relative to the full program audience*



Source: Kantar Media Audiences RPD



# Kantar Media Commercial Measurement Case Studies



# Kantar Media RPD Services

## Case Studies – Commercial Ratings



### Top 25 Rated 2013 Super Bowl Commercials

2013 Super Bowl Commercial Ranking	Airtime	HH Rating (%)	Length
CBS-Person Of Interest/CBS: Person of Interest Promo	10:31:06 PM	47.4	20
Samsung Galaxy/Celebrities Argue Over Next Big Thing	10:29:06 PM	47.2	120
Mercedes Benz Autos/W. Dafoe & K. Upton: Soul	10:21:41 PM	46.6	60
Tide/Miracle Stain	10:13:54 PM	46.5	60
Soda Stream/Bubbles Set Free	10:14:54 PM	46.3	30
Kia Trucks/Space Babies	10:05:51 PM	46.2	60
CBS-Hawaii Five-O/CBS: Hawaii Five-O Promo	10:22:41 PM	46.2	20
CBS-Elementary/CBS: Elementary Promo	9:59:27 PM	46.1	20
CBS-Job/CBS: The Job Promo	10:23:01 PM	46.1	20
CBS Cares/PSA/Wounded Warrior Donation Solicitation	10:06:51 PM	45.9	20
Dodge Trucks/P. Harvey: Farmer	9:57:27 PM	45.8	120
NFL National Football League/NFL Football Promo	10:07:11 PM	45.6	10
NFL National Football League/NFL Football Promo	7:54:03 PM	45.4	30
Lincoln Autos/Memorable Roadtrips	9:33:25 PM	45.3	30
NFL Network Cable TV/D. Sanders: Rookie	9:51:04 PM	45.3	60
Kia Autos/A. Campanella: Hotbots	9:25:32 PM	45.2	30
CBS: C. Ferguson Super Bowl Special Promo	9:52:04 PM	45.1	5
CBS-Elementary/CBS: Elementary Promo	7:47:10 PM	45.1	20
Bridgestone/Moment of the Year: Baltimore Comeback	7:46:40 PM	45.1	30
Skechers GORun 2/Man Chases Cheetah	7:46:10 PM	45.1	30
CBS-Various Programs/CBS: Various Programs Promo	10:15:24 PM	45.1	30
Taco Bell Restaurant/Viva Young	7:45:10 PM	45.1	60
Lincoln Autos/Not What You Think	7:49:27 PM	45.0	30
CBS-Various Programs/CBS: Various Programs Promo	9:36:58 PM	45.0	30
Budweiser/Man Reunited With Clydesdale	9:35:58 PM	45.0	60

### AdvertisingAge®

**Samsung 'Pitch' is Super Bowl's Second-Highest-Rated Ad. But No. 1 Is...**  
**No. 1 Ad Seems To Have Been CBS Promo for 'Person of Interest'**

*Published:* February 05, 2013

The highest-rated TV commercial in Sunday's Super Bowl XLVII apparently wasn't a paid ad from a big marketer, but a CBS promo.



CBS  
Michael Emerson as Finch on 'Person of Interest'

#### Related Stories

Search No More: All the 2013 Super Bowl Spots in One Place  
Did Adland Bring Its A-Game to Biggest Night of the Year?

A spot promoting "Person of Interest" that aired at 10:31 p.m. won a household rating of 47.4, Kantar Media said Tuesday, meaning 47.4% of households in Kantar Media's panel were turned in at that point. That narrowly beat Samsung's "The Big Pitch," in which Seth Rogen and Paul Rudd argued over Super Bowl ad ideas – good for a 47.2 household rating.

Kantar said its data comes from second-to-second tuning records from its Return Path Data sample of set-top boxes in 100,000 houses across the U.S.



# Kantar Media RPD Services

## Case Studies – Commercial Pod Evaluation

MTV's *Jersey Shore* HH RPD Ratings 2/17/11 10-11PM



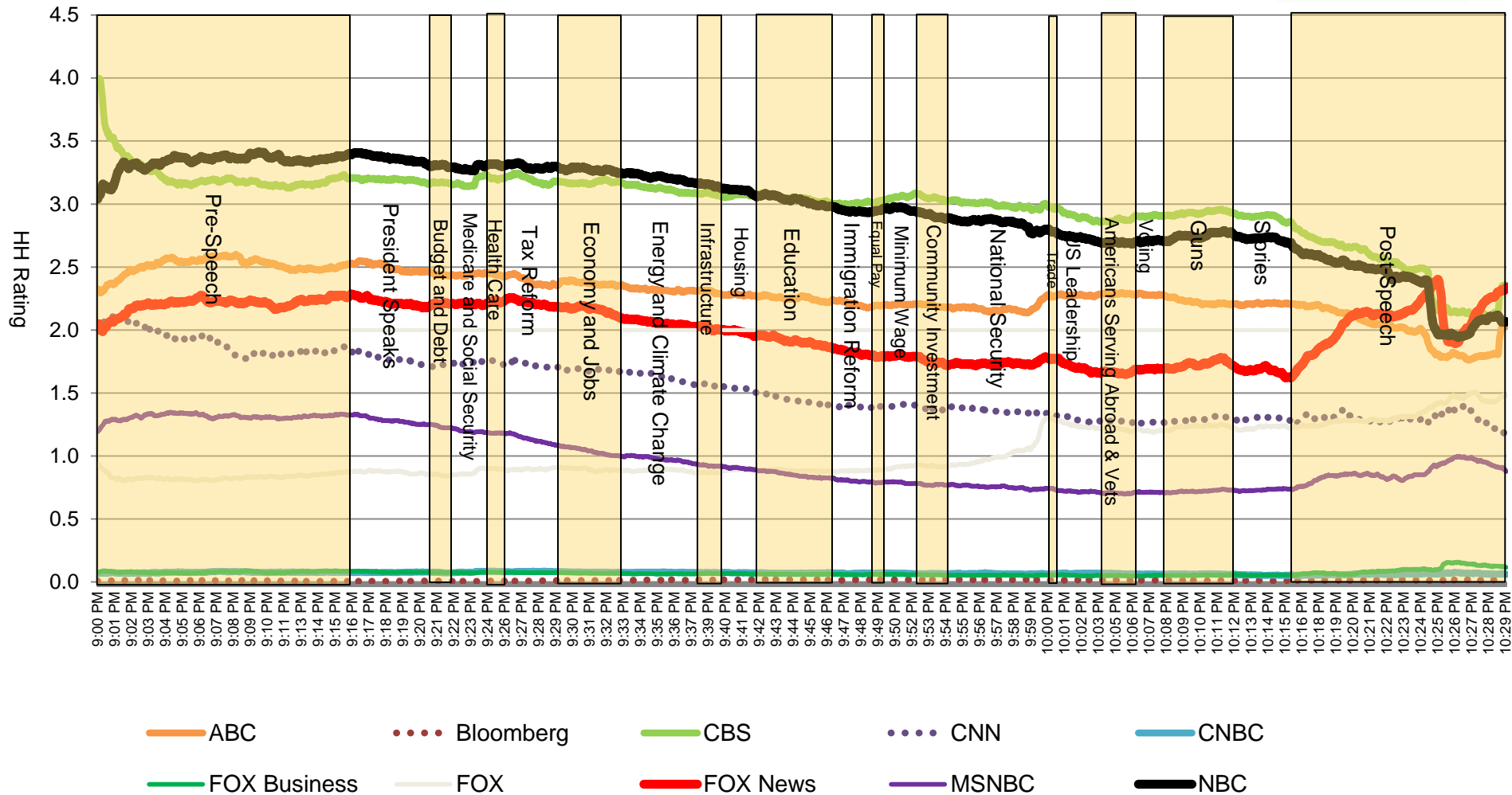
Source: Kantar Media Audiences DIRECTView™ – 2/17/11RPD HHs, Live

# Kantar Media RPD Services

## Case Studies – Contextual Ratings



State Of The Union Tuning Analysis By Topic 2/12/13 9p-10:30p EST

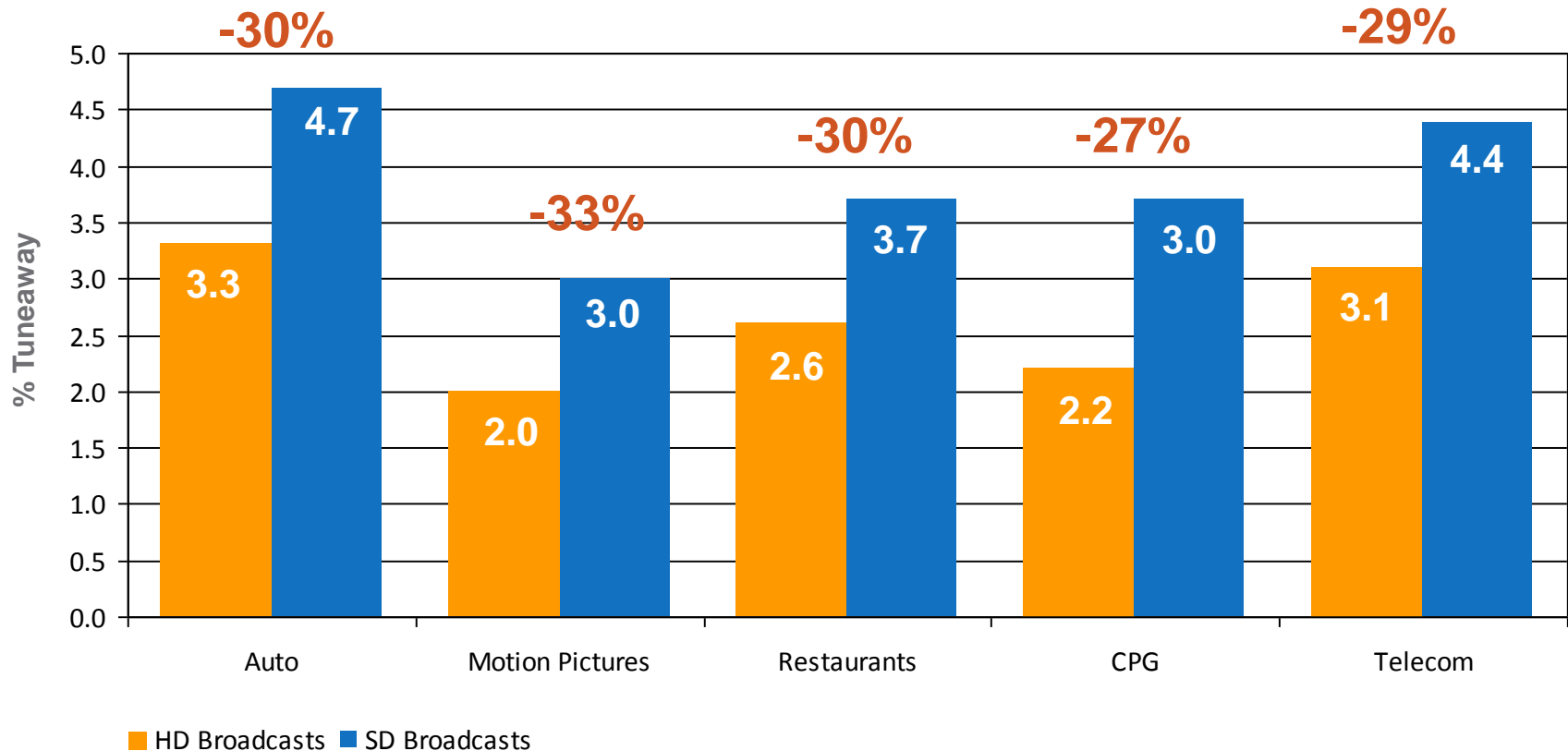


Source: Kantar Media Audiences DIRECTView – 2/12/13 RPD HHs, Live

# Kantar Media RPD Services

## Case Studies – HD vs. SD Commercial Retention

*HD Commercials Hold Audiences Better Than SD*

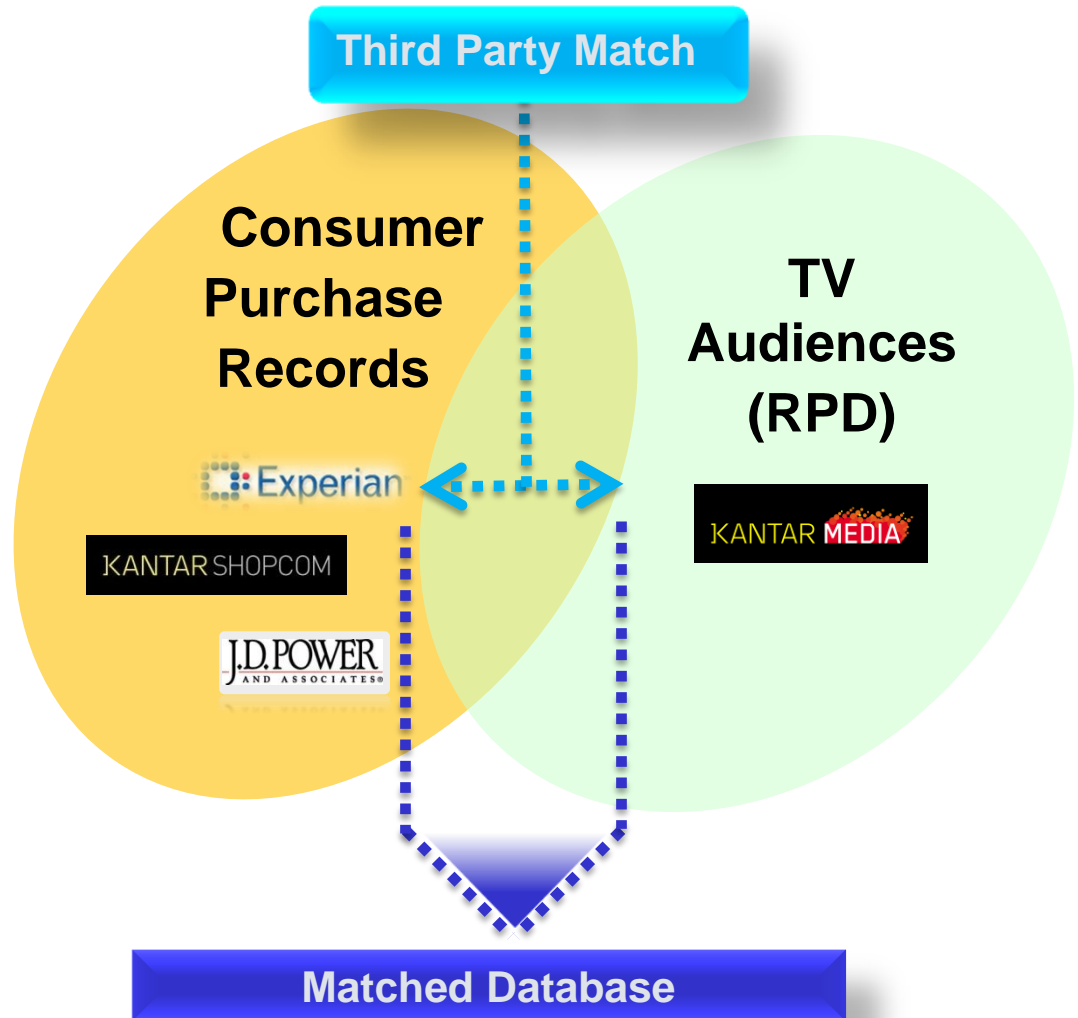


Source: Kantar Media Audiences

# KMA RPD Behavior Segmentation

## Matching HH Tuning & Consumer Activity

*Actual HH TV tuning is matched with actual consumer purchases through 3<sup>rd</sup> Party privacy-protected procedures.*



# Kantar Media RPD Services

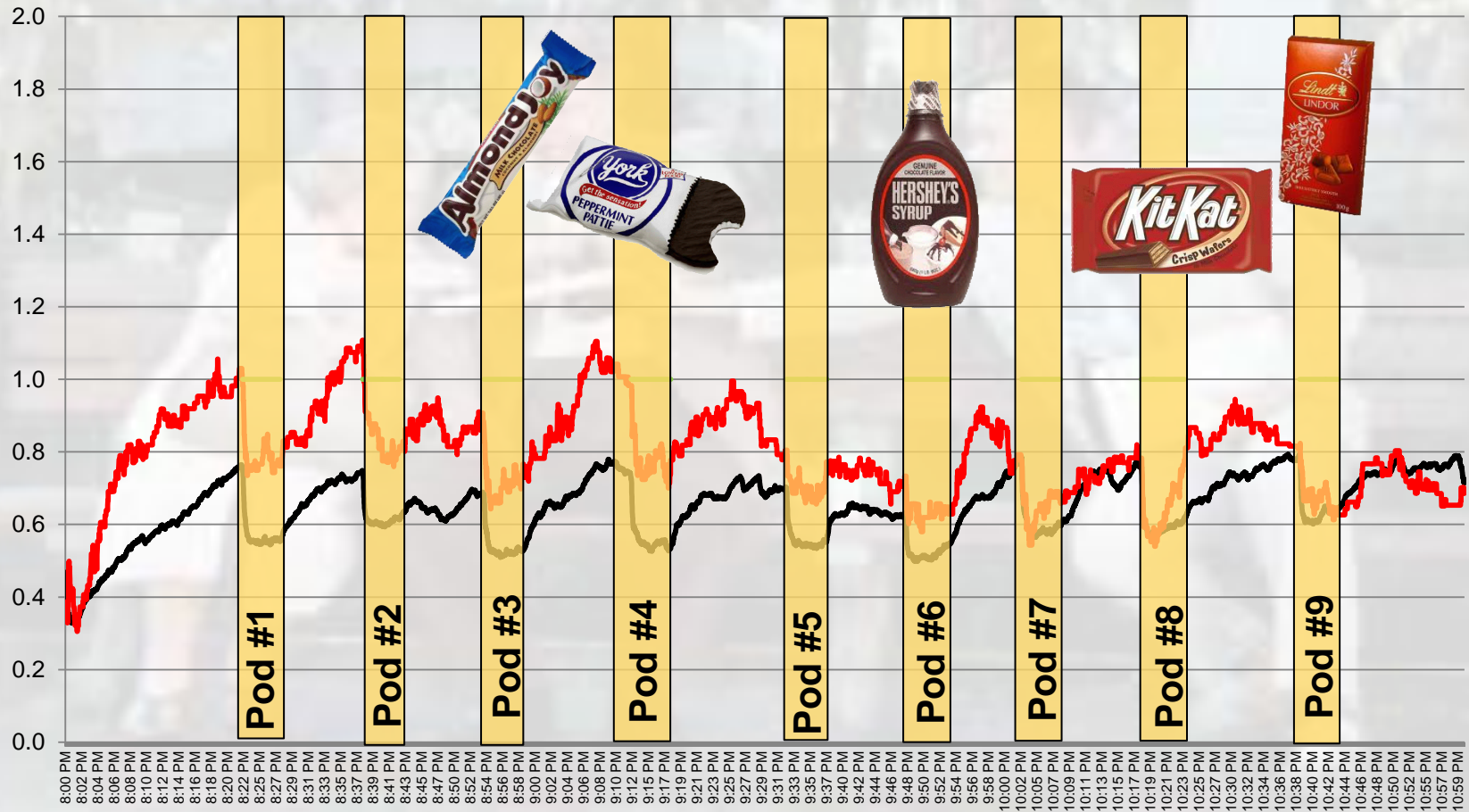
## Case Studies – Contextual Advertising Effectiveness

TNT's *Forest Gump* HH Ratings 1/28/12 8pm-11pm



HH RPD Ratings

— Total HHs — Chocolate Candy Buyers

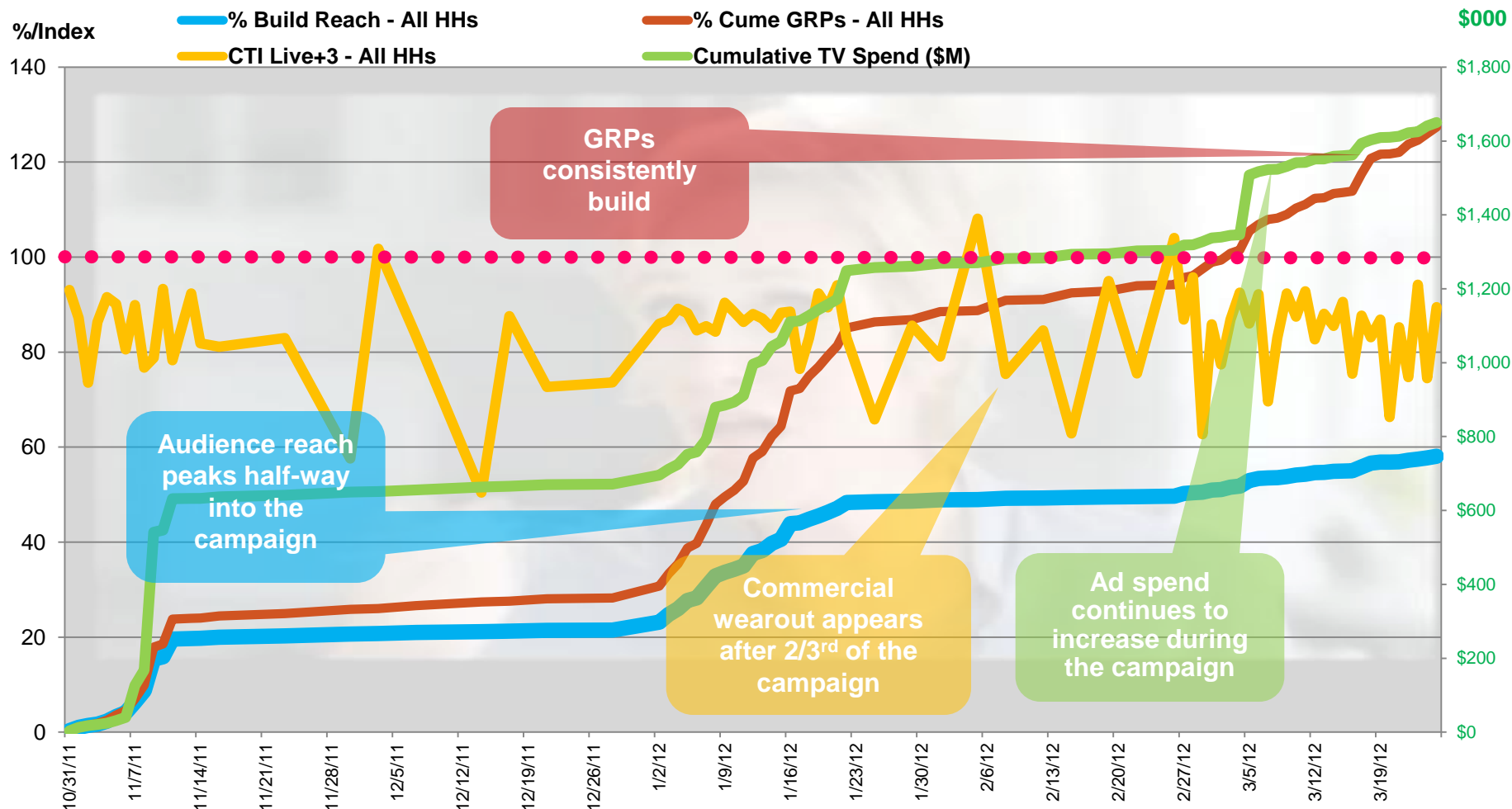


Source: Kantar Media Audiences DIRECTView – 1/28/12RPD HHs, Live

# Kantar Media RPD Services

## Healthy Choice Campaign EKG - Reach, Wearout & Media Spend

% Build Reach, CTI Live+3 and Cumulative TV Spend\* for Healthy Choice J. Lynch: Roles Some Ingredients Play Campaign 10/31/11-3/25/12



Ad Spending Source: Kantar Media Intelligence 2012. Campaign 439 spot occurrences

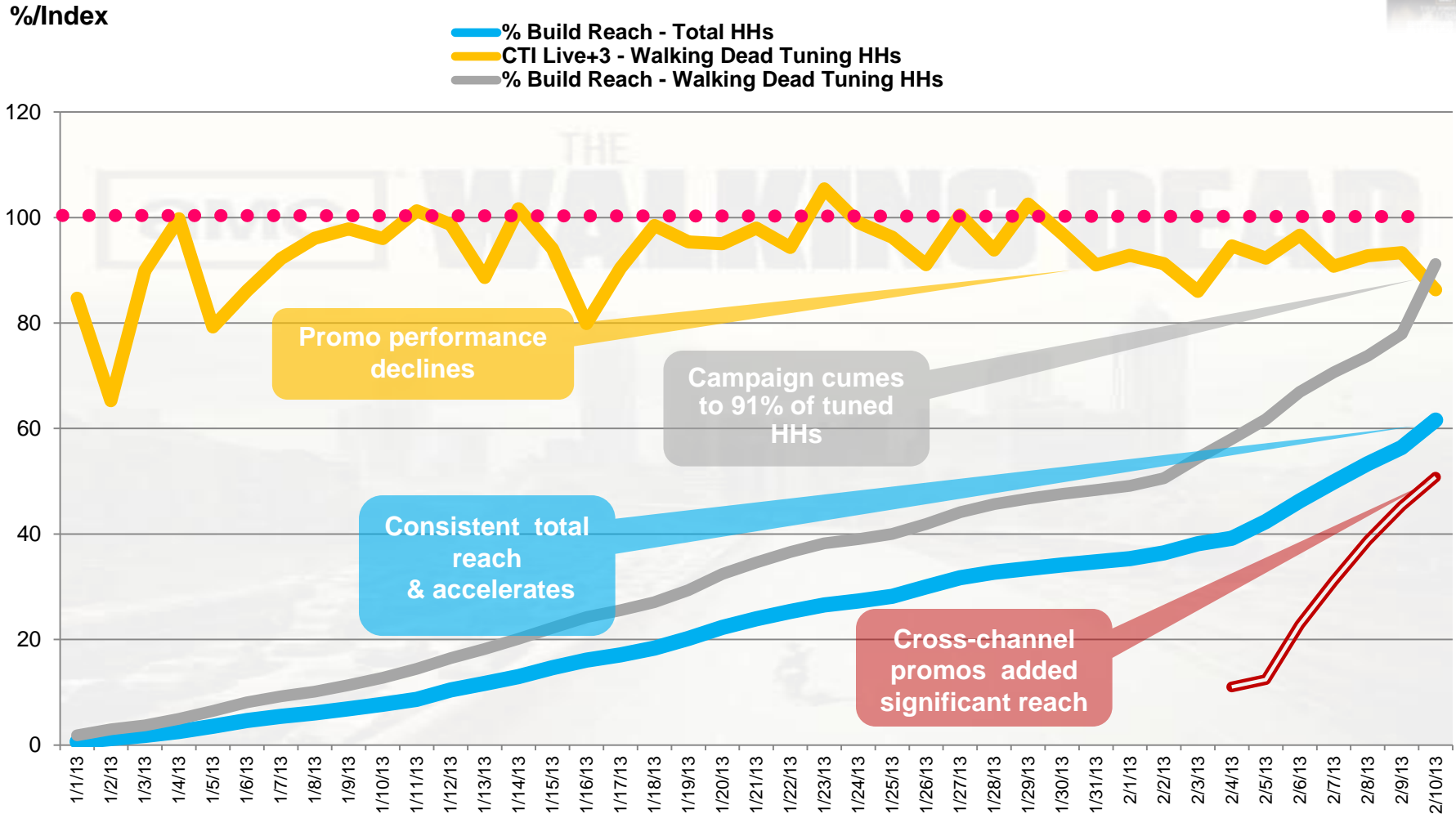
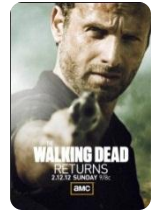
Audience Source: Kantar Media Audiences DIRECTView – RPD HHs, Live +3



# Kantar Media RPD Services

## AMC Walking Dead Promo Campaign “EKG” – Reach and Wearout

% Build Reach and CTI Live+3 Among Total Households and HHs Tuning to Premiere 1/1 – 2/10/13



Source: Kantar Media Audiences; 1,282 Total Promo Spots: 85% on AMC; 15% on other Networks

# Kantar Media Services – Return Path Data (RPD)

## Commercial Measurement - Advanced Analytics

What is the actual audience to the specific ad & promo campaigns?

- Second/second tuning
- Networks, programs, dayparts
- Campaign performance

Is the audience avoiding the commercial?

- Commercial tuning index
- Tuneaway
- Wearout

At what point does the commercial audience stop growing?

- Audience duplication
- By campaign

Competition: Which campaign scores the highest?

- Performance by category/brand/genre

Investment: Which campaigns are most effective & engaging?

- Campaign EKG - TV audience, expenditures and commercial avoidance by campaign
- Effectiveness & Engagement - campaign exposure impact



## Discussion

