



On a journey to cross-media measurement with Nielsen

Kateryna Edelshtein
CCO EMEA

1 WHO WE ARE

2 OUR SOLUTIONS

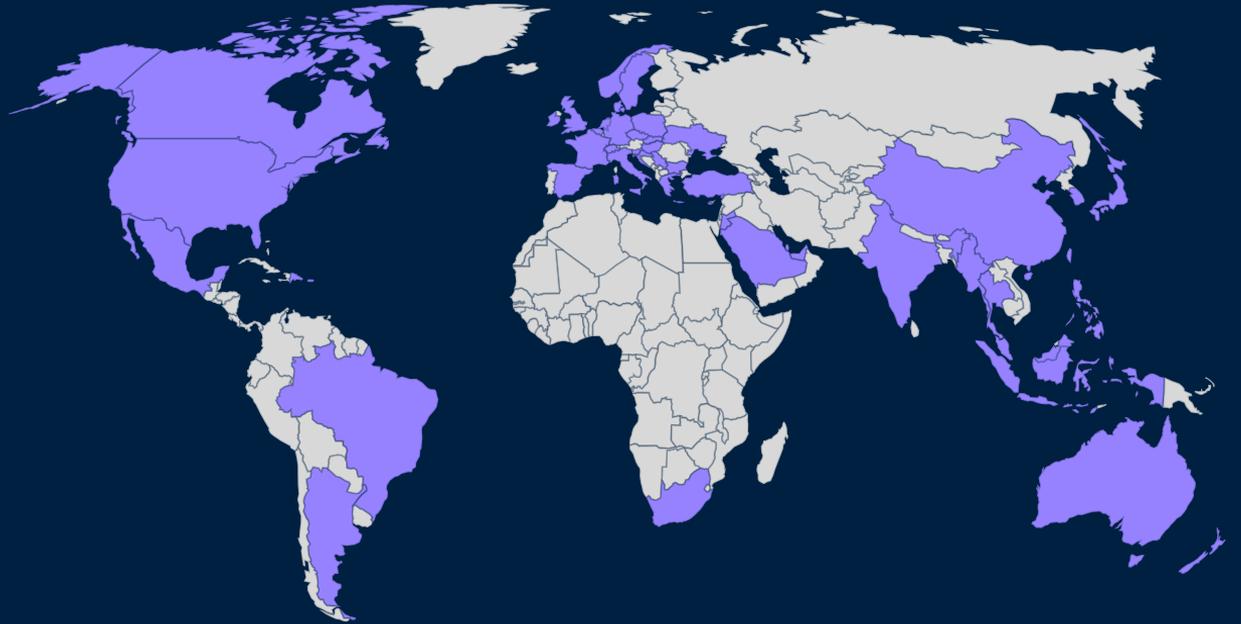
3 JOURNEY IN POLAND

4 Q&A



Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics.

We operate around the world, in more than 55 countries



We provide data,
analytics and
insights to ...

700 + brands
1200 + agencies
1500 + media
sellers

We meet different needs

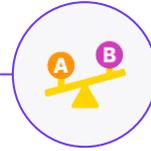
Media Buyers



Media planning
and campaign
evaluation



Budget
optimization



Maximize reach of
unique audiences.



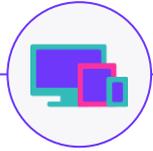
Maximize ROI

We meet different needs

Media Owners & Sellers



Understand the viewers journeys:
consumer acquisition & retention



Measure content performance
across screens & platform :
maximize inventory



Competitive
landscape



Optimize content
production,
distribution and
acquisition

GLOBAL PLATFORM RELATIONSHIPS

CONTENT MEASUREMENT

-SVOD LIBRARIES GLOBAL & LOCAL:

NETFLIX
AMAZON
DISNEY +
HBO
HULU
APPLE

-AUDIO MATCHING FOR YT



ADS MEASUREMENT

- ADOPTED DAR AS DIGITAL ADS MEASUREMENTS
- DIRECT PARTNERSHIPS ON CTV VIDEO ADS MEASUREMENT
- SERVER TO SERVER INTEGRATION AGREEMENTS FOR IDENTITY AND DEDUPLICATION
- TOTAL VIDEO ADS MEASUREMENT

DIRECT INTEGRATIONS

- LIVE EVENTS 1ST PARTY DATA INTEGRATIONS:
- IDENTITY DATA INTEGRATIONS
- SERVER TO SERVER INTEGRATIONS FOR CTV ADS MEASUREMENT
- ACR INTEGRATIONS

**NEW REVENUE
OPPORTUNITY &
CONSISTENT METRICS
FOR ALL**

Our solutions

for planning

**Nielsen
Media
Impact**

for measurement

**Nielsen
ONE**

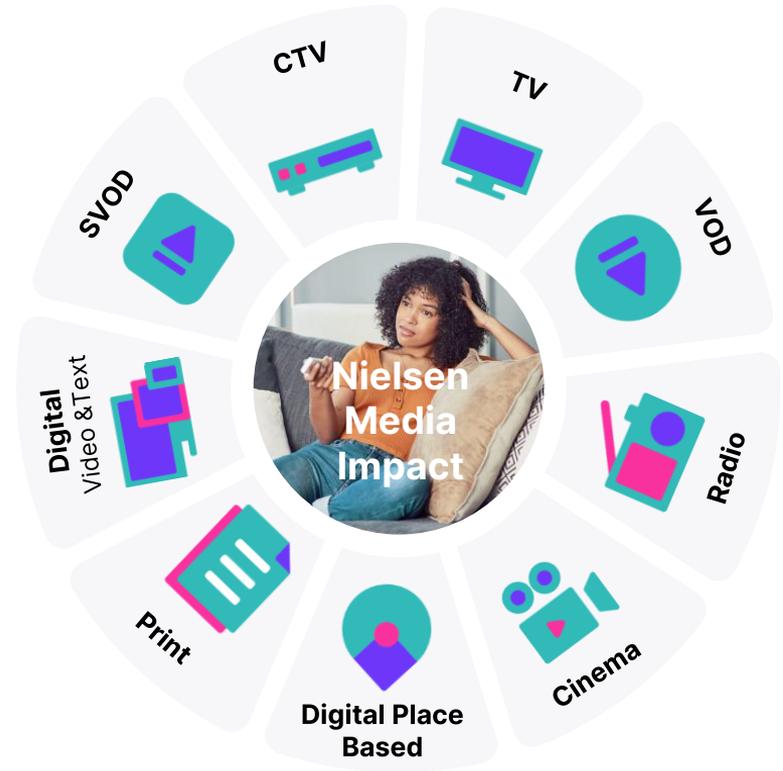
Nielsen Media Impact

NMI brings platforms together

Links media consumption across
media/platforms

Census and respondent level data for
granular media planning

Supports user-defined advanced
audiences beyond age and gender



One solution, multiple functions

Flexible planning for today's media landscape

INSIGHTS



Historical

Explore past data to see how your **target audience** has used **media**, understanding **reach** and **time spent**

PLANNING



Future campaign simulations

Analyze schedules & **test** various **scenarios** modifying GRP/impression levels and **flying patterns**

OPTIMIZATION



Evaluate the impact of **budget changes**, **media reallocation** or **share shift** from one media to another

NMI advantages overview

Total media fusion

Media	Audience	Integration	Software
Media coverage	Audience attributes	Bring your own data	Graphical interface
<ul style="list-style-type: none">● Granular census and respondent level cross-media consumer behavior<ul style="list-style-type: none">○ TV/VOD○ SVOD○ TV connected device○ Ad-supported CTV○ Radio○ Digital○ Print	<ul style="list-style-type: none">● Advanced audience segments including:<ul style="list-style-type: none">○ Behavioral○ Automotive○ Commerce○ Finance○ Lifestyle○ Influence○ Media consumption○ Client custom segments	<ul style="list-style-type: none">● Audience auto-import from Nielsen Audience Planner● Import custom audiences● Incorporate MMM or other ROI data● Import competitive TV schedules from Nielsen Ad Intel*● Import digital schedules from Digital Ad Ratings	<ul style="list-style-type: none">● Seamless workflow across the planning process to help you be more effective● Flexibility to create targets and media groups

*Custom import option also available

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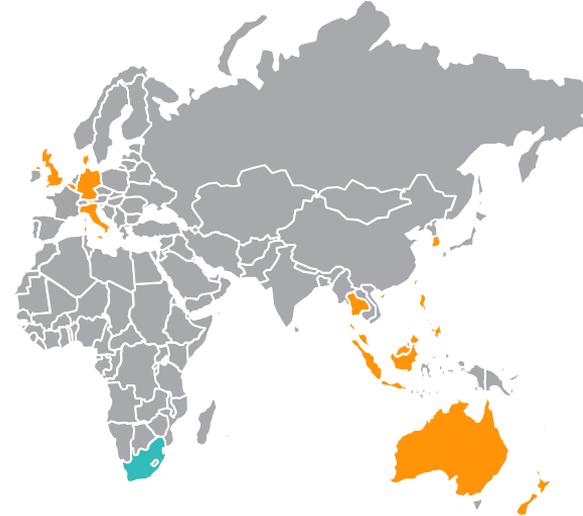
NMI international footprint

Live



Pipeline

MEXICO



Under assessment

CANADA

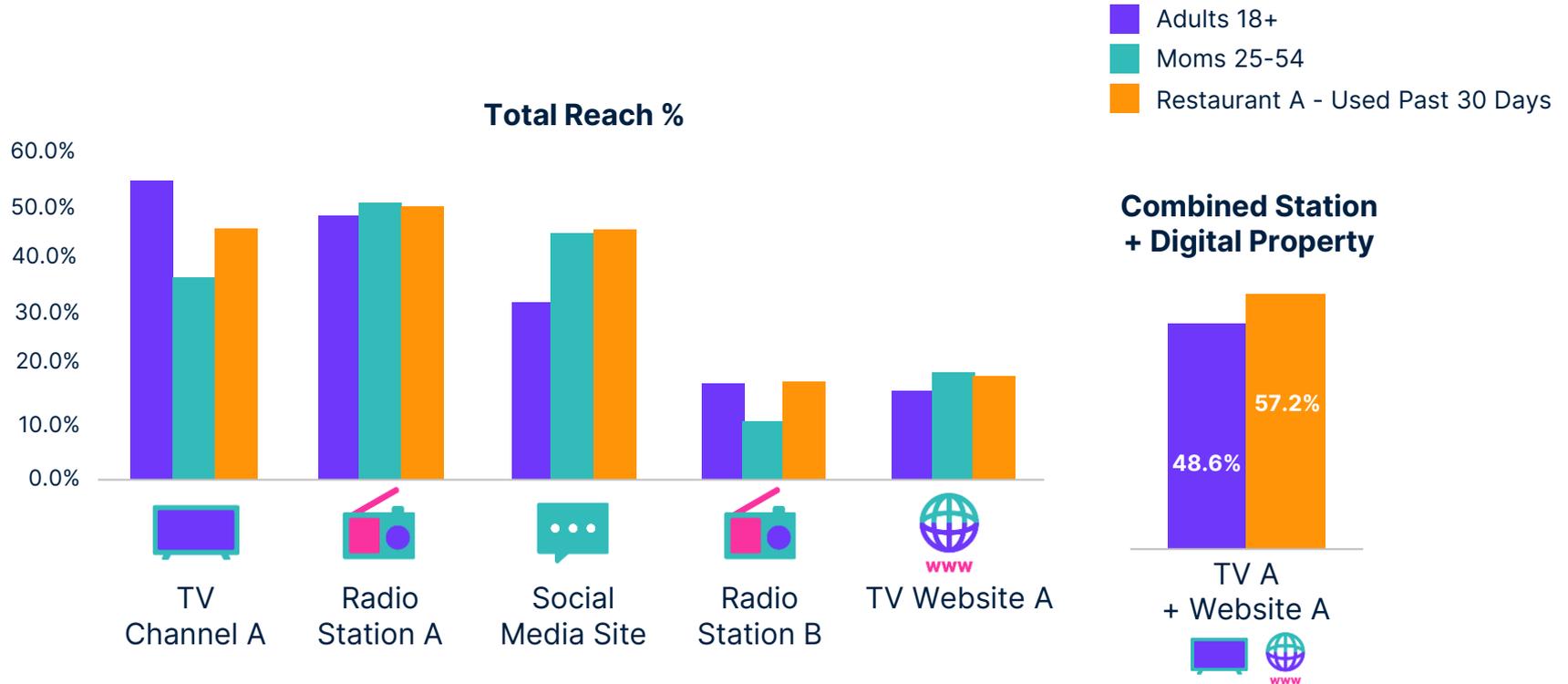


SOUTH AFRICA



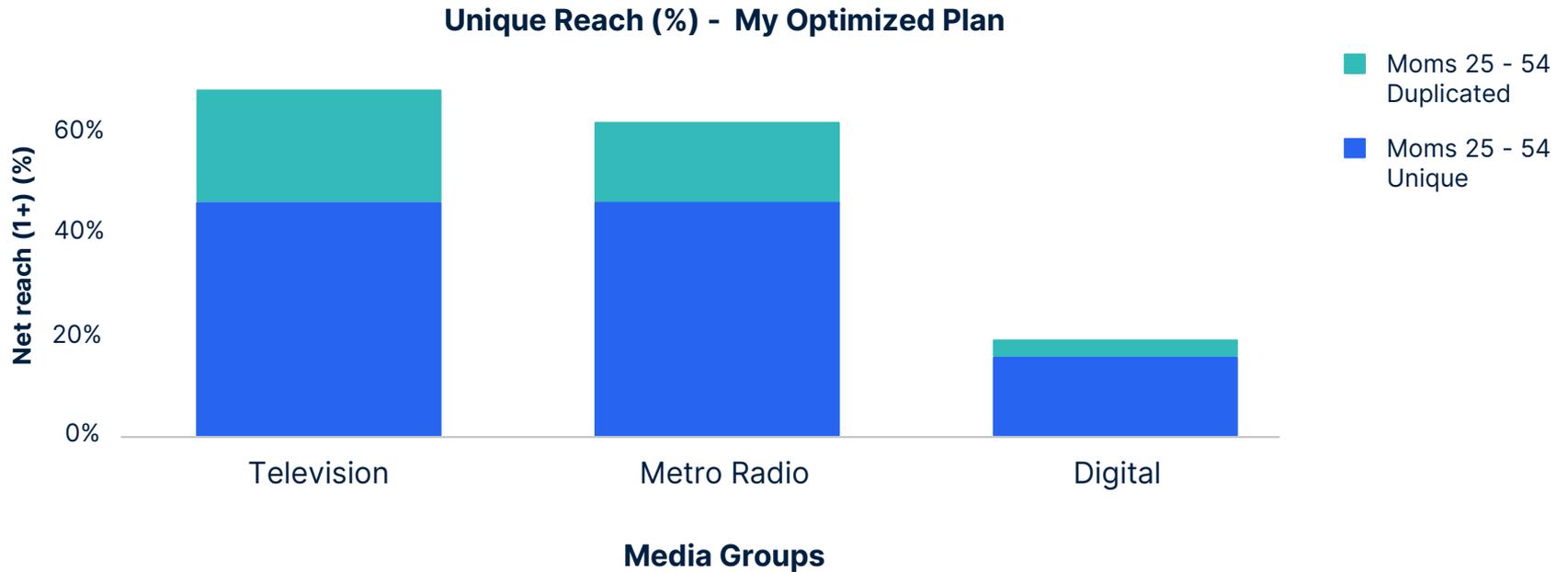
Multimedia insights

Determine the properties and combinations of media channels that are best suited for your target(s)



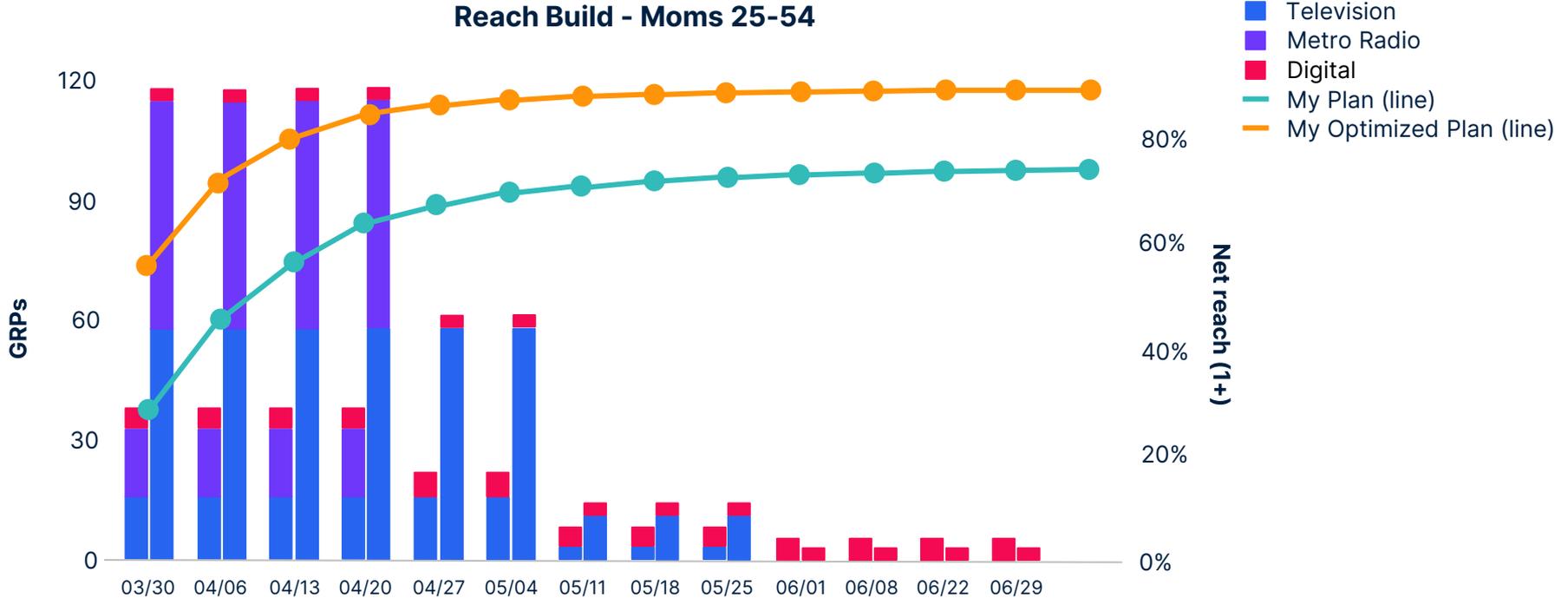
Efficiency

See what is most effective in driving unique reach for your plan, and what is most cost efficient



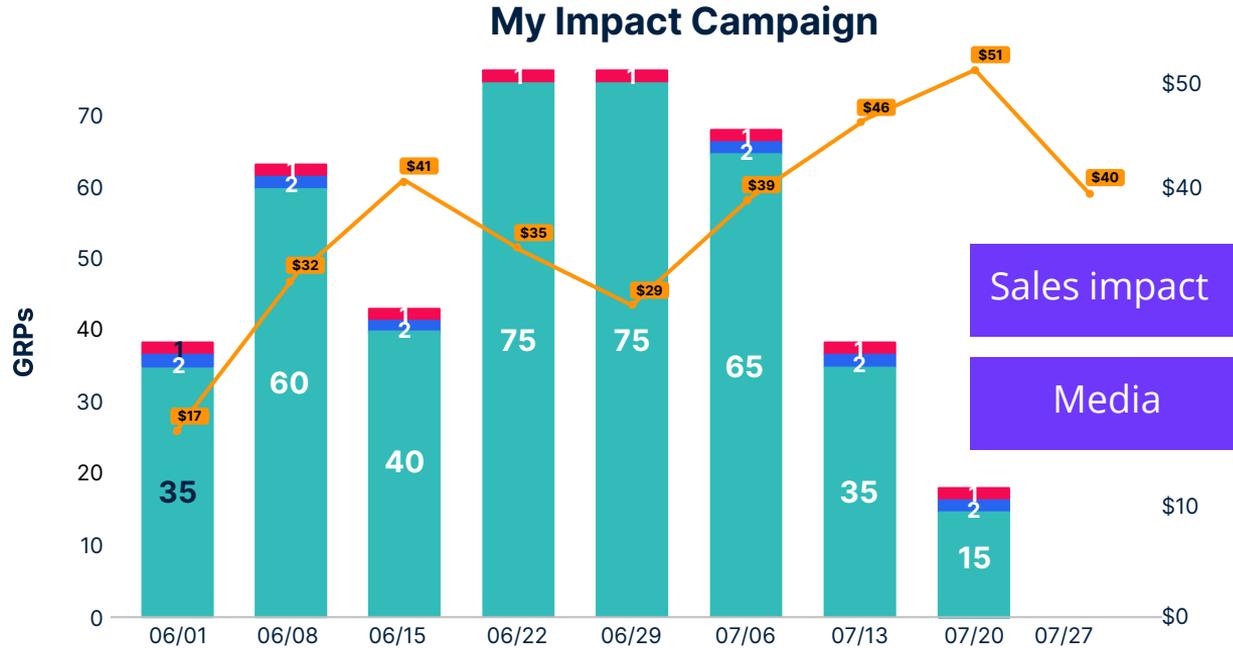
Optimize & compare

Explore different optimization scenarios and compare plans easily



Sales impact

Discover the expected impact on your sales or other brand key performance indicators



Based on Nielsen Total Media Fusion GFK MRI Survey of the American Consumer 6/29/2015 0 7/26/2015 (Television, Internet & Mobile)
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Future of measurement: Nielsen One

THE FUTURE OF MEASUREMENT

We achieve



Maximized Deduplicated Reach for Content & Ads, for Sellers & Buyers to monetize, plan and optimize

through



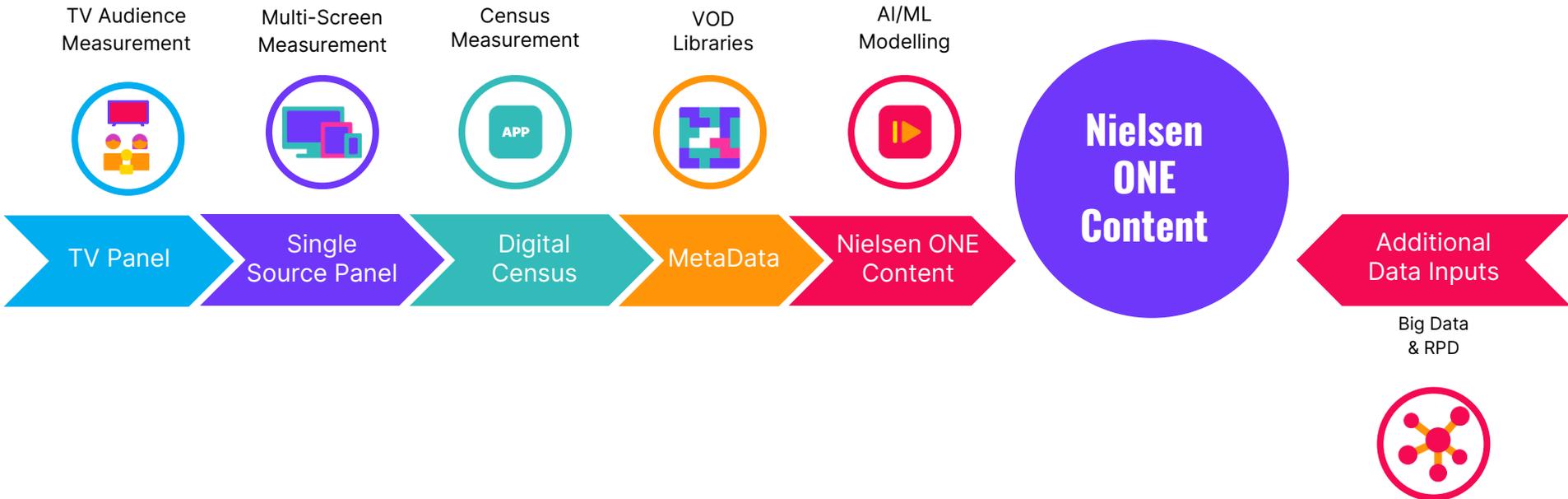
Innovation to build True Cross-Media Measurement to cover local Needs with global Power

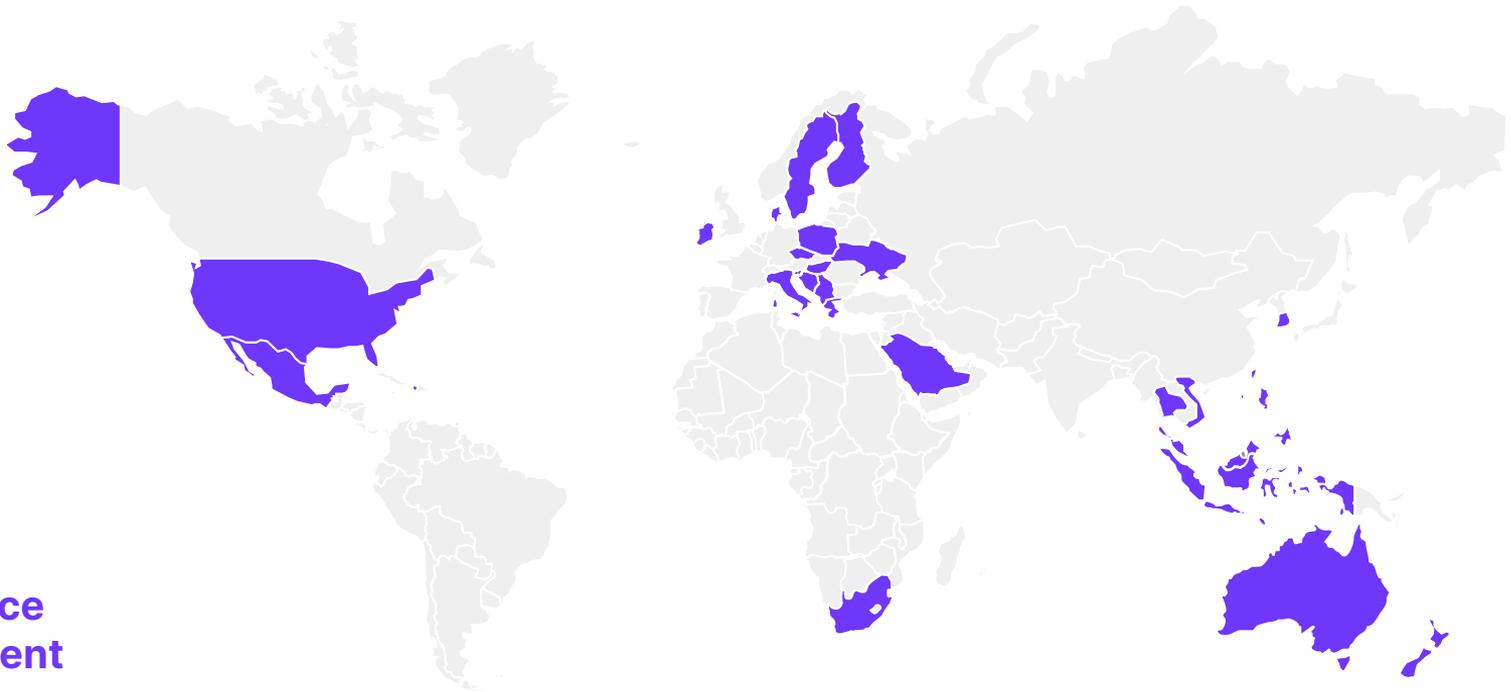
with Tools like



Partnerships / Big Data Integration / Out of Home Measurement

Nielsen ONE is a journey





TV Audience Measurement

Armenia (TP)

Australia

Bosnia & H. (TP)

Croatia

Cyprus

Czech Republic

Denmark

Finland (JV)

Georgia (TP)

Greece

Hungary

Indonesia

Ireland

Italy

Malaysia

Mexico

Moldova (TP)

New Zealand

N. Macedonia

Philippines

Poland

Puerto Rico

Saudi Arabia

Serbia

Slovenia

South Africa

South Korea

Sweden

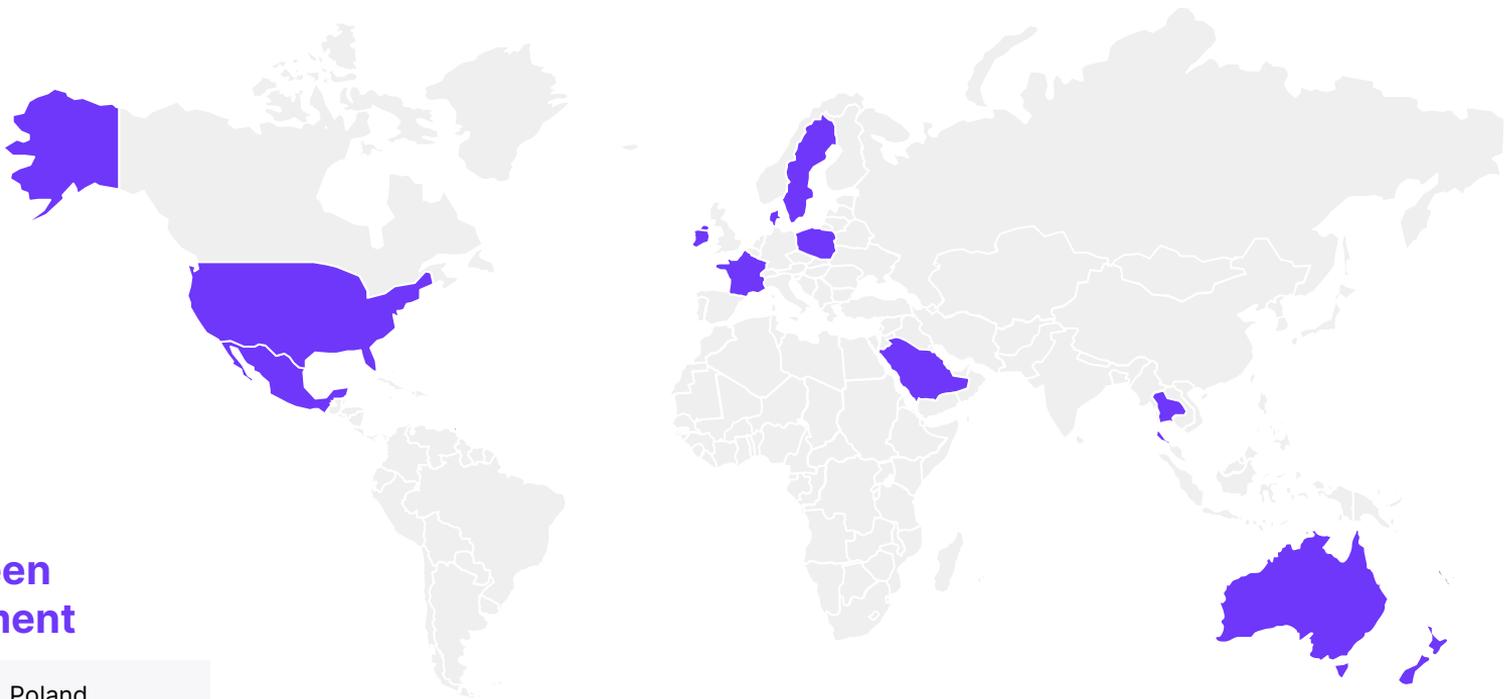
Taiwan

Thailand

Ukraine

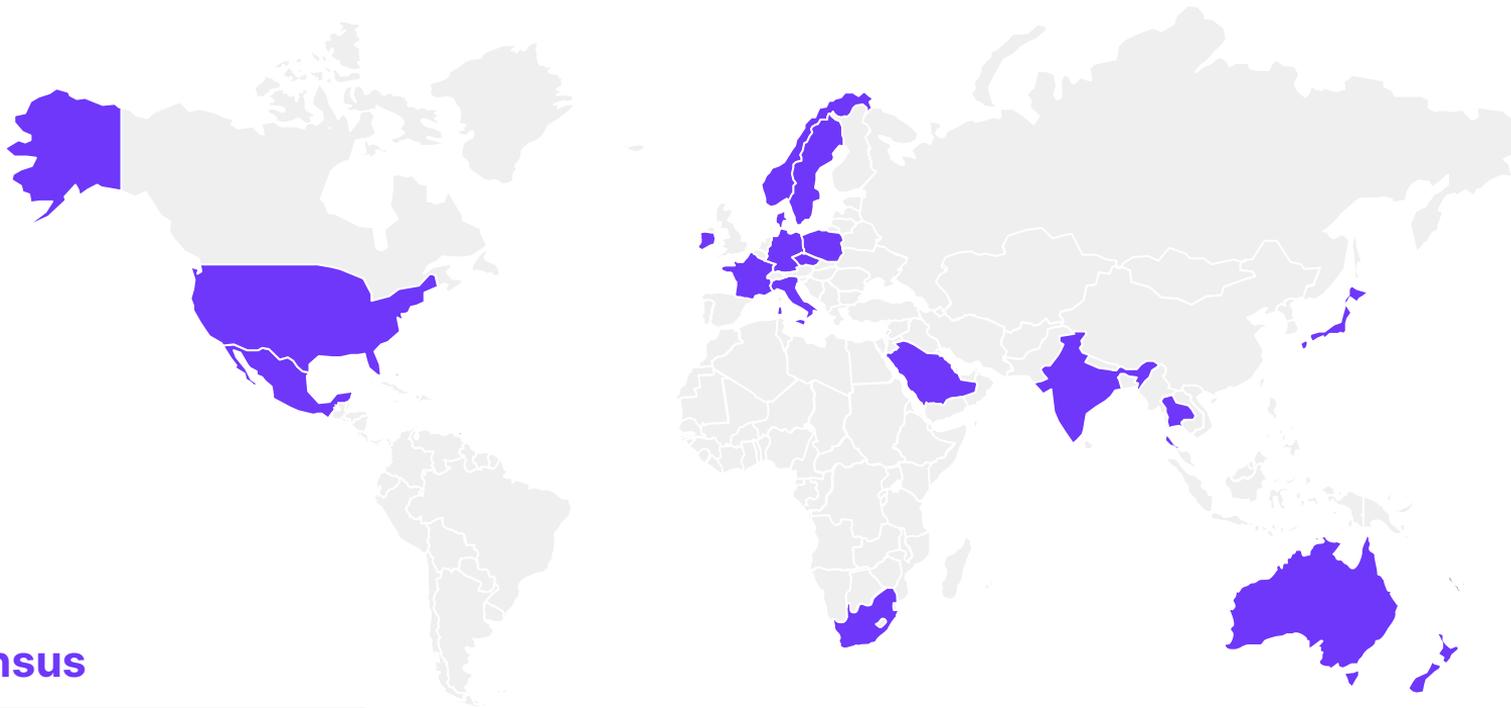
USA

Vietnam (TP)



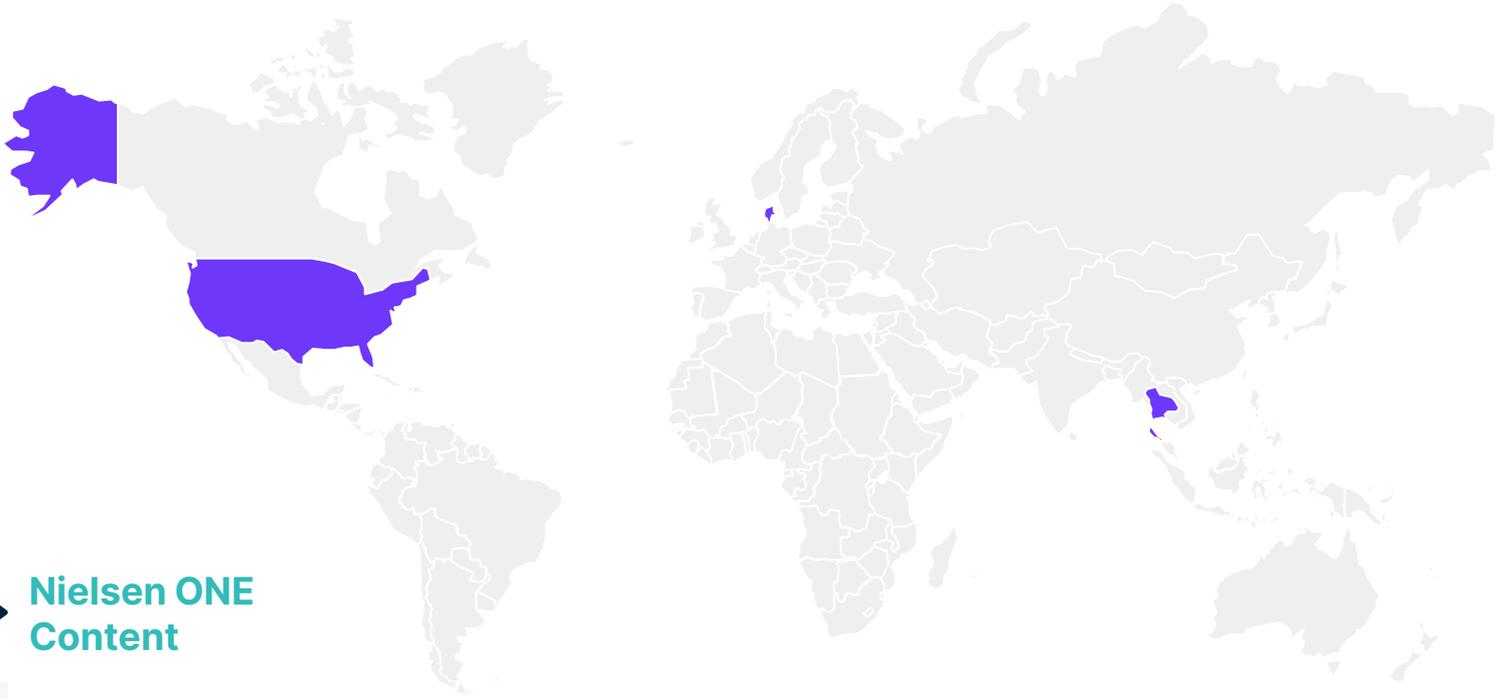
Multi Screen Measurement

- | | |
|-------------|--------------|
| Australia | Poland |
| Denmark | Saudi Arabia |
| France | Sweden |
| Ireland | Thailand |
| Mexico | USA |
| New Zealand | |



Digital Census

Australia	Ireland	Poland
Czech Republic	Italy	Saudi Arabia
Denmark	Japan	(2024)
France (2024)	Mexico	Sweden
Germany	New Zealand	Thailand
India	Norway	USA
		South Africa
		(2024)



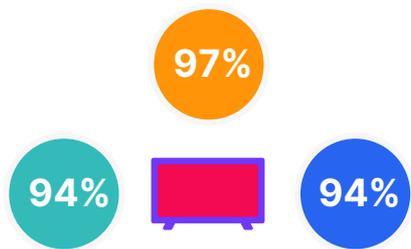
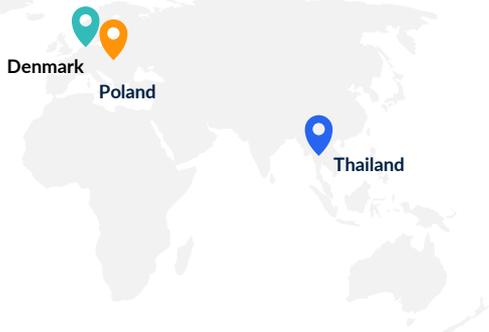
Total Audience



Nielsen ONE Content

- Denmark
- US (*alpha stage*)
- Thailand (*2024*)

Big screen still big

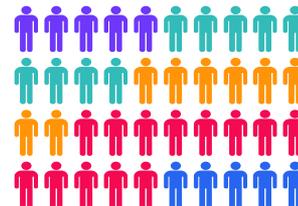
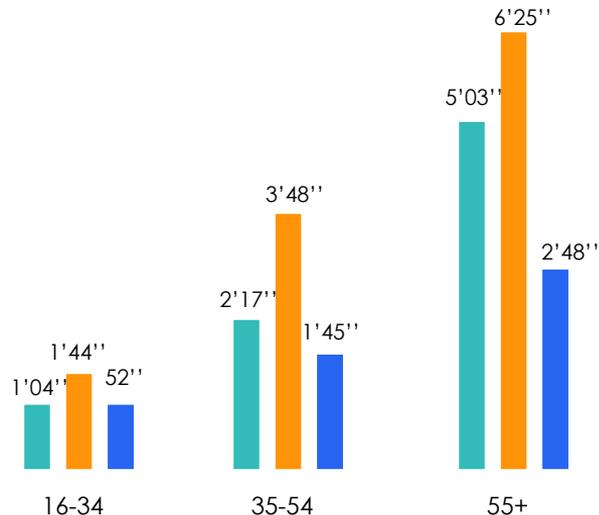
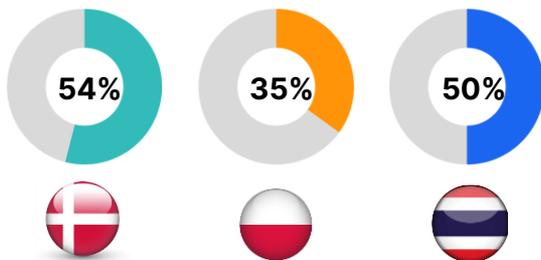


TV Households

Total daily time spent on video on TV screen



Prime Time share





Channel	Programme	Genre
DR1	Her Majesty The Queen's New Year Address 2022	Event
TV 2	Handball: EHF Euro - Denmark-Norway (w), final	Sport
TV 2	Seaside Hotel (Badehotellet)	Fiction

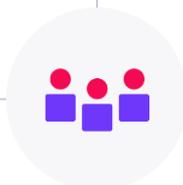
Top 3 programmes with biggest TV audience in 2022



Channel	Programme	Genre
TVP2	New Year's Eve Concert	Event
Polsat	Home Alone	Movie
TVP1	Wiadomości	News



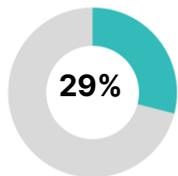
Channel	Programme	Genre
Workpoint TV	LB-FIVB Volleyball Women's World Champion. (THA+DOM)	Sport
Workpoint TV	LB-FIVB Volleyball Women's World Champion.(THA+CAN)	Sport
Workpoint TV	LB-FIVB Volleyball Women's World Champion..(THA+GER)	Sport



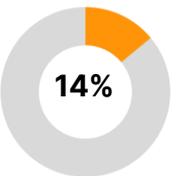
Sport, events broadcast but also films and series, and occasionally news, are what gather largest audience in specific time in front of the TV screen

Digital screens add up significant share of viewing

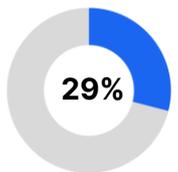
Up to 30% of additional viewing time



+1 hr 04 mins



+ 35 mins



+45 mins

Share of digital devices in total viewing time

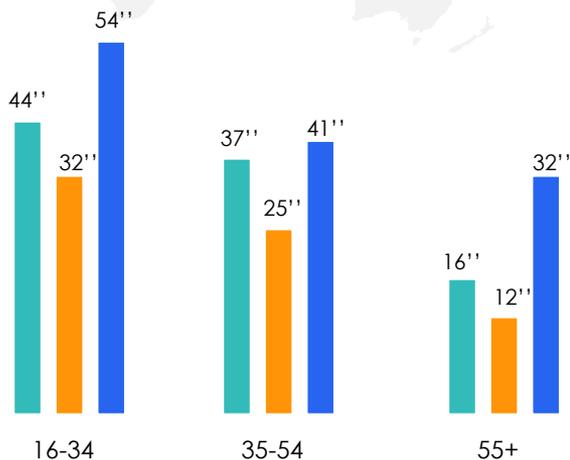
Incremental time spent on digital devices

Smartphone	0'27''	0'20''	0'40''
Laptop	0'25''	0'12''	0'04''
Tablet	0'12''	0'02''	0'02''

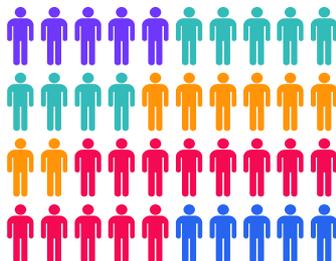
Younger audiences tend to shift their focus on digital screens



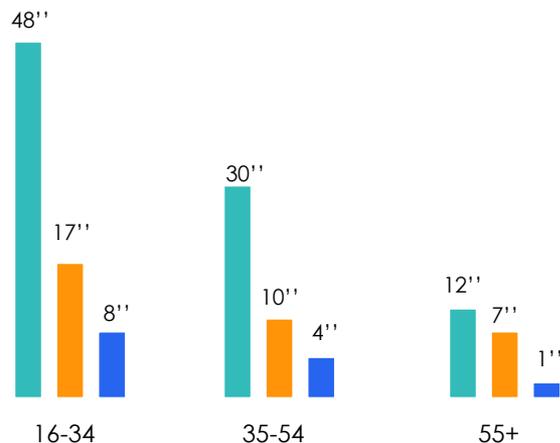
Time spent



Smartphone



Time spent



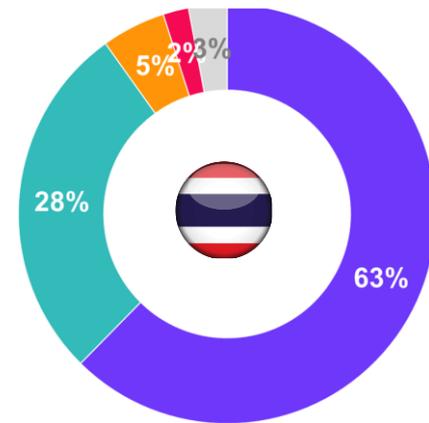
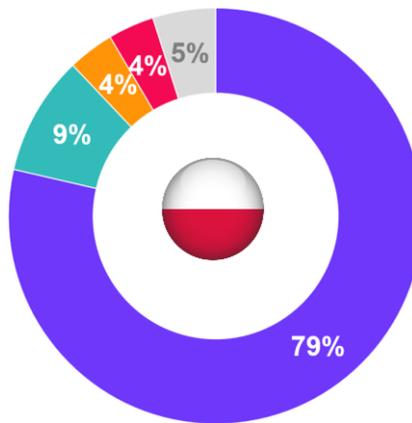
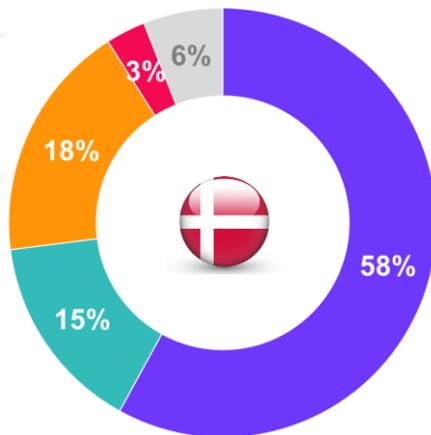
Laptop



Total video snapshot reveals that markets follow different paths

Video content consumption at home - 4 screens

- Live TV and TSV
- Social Media Video
- VOD&OTT platforms
- Other streaming
- Other content





16-34	35-49	50+
YouTube	YouTube	TV 2 PLAY
Netflix	Netflix	DRTV
TV 2 PLAY	DRTV	YouTube



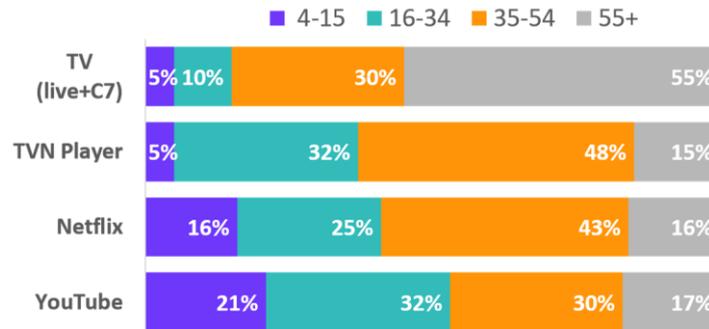
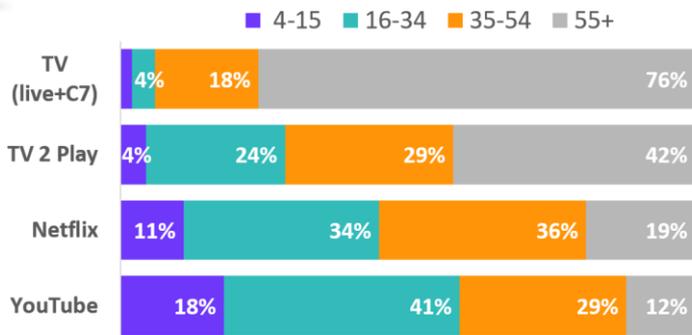
16-34	35-49	50+
YouTube	YouTube	YouTube
Tiktok	Netflix	Facebook
Netflix	Facebook	Netflix

Top 3 streaming platforms on 4 screens by age of viewers

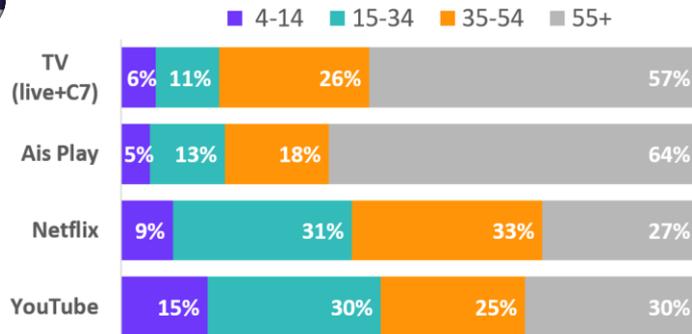


15-34	35-49	50+
YouTube	YouTube	YouTube
Tiktok	Facebook	Ais Play
Facebook	Tiktok	TrueID

Global platforms may dominate streaming, but local players and services have a place at the top



Audience composition

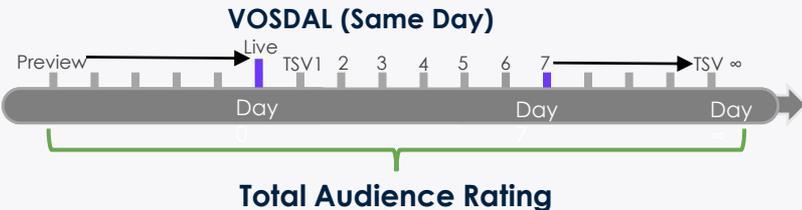
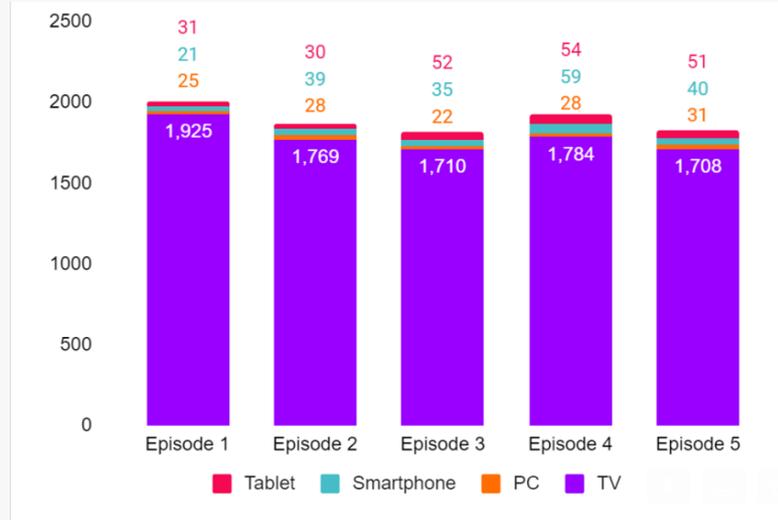
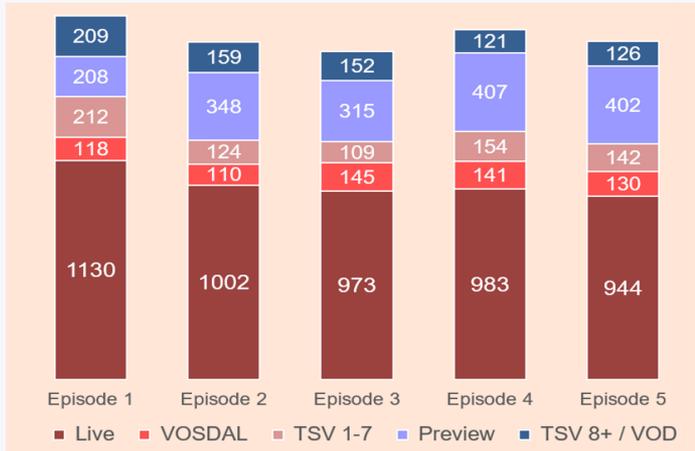


Media and platforms have their unique audience profile

Notably, even for local streaming providers - streaming allows to engage younger audiences across digital screens.

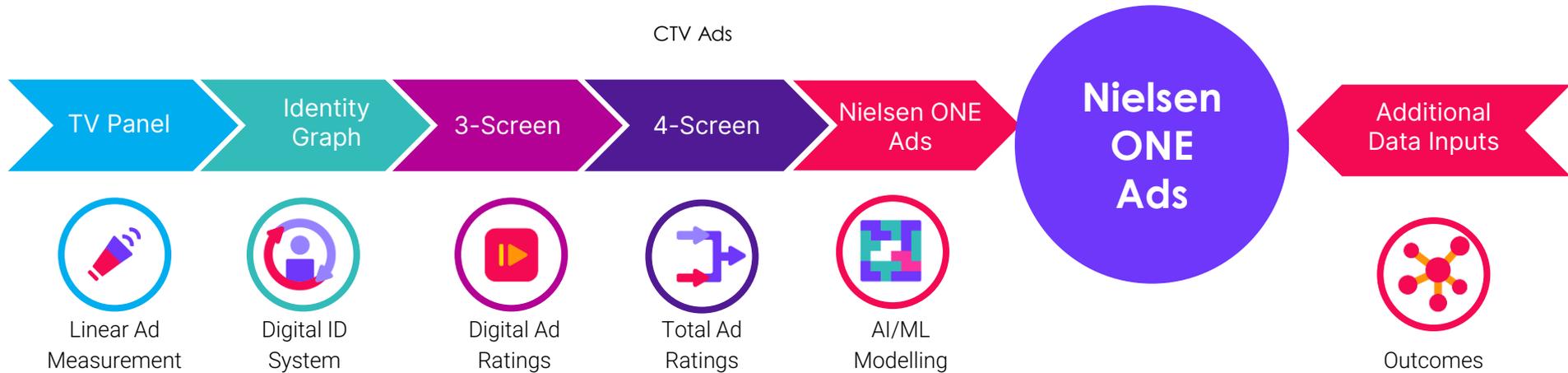
In a nutshell: following audience wherever they are

1'460	1'237	1'226	1'278	1'216
+417	+507	+467	+528	+528

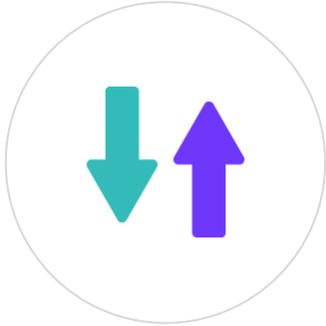


Incremental reach through additional devices and modes of viewing

Nielsen ONE ADS



Nielsen ID System Ensures Trusted Metrics



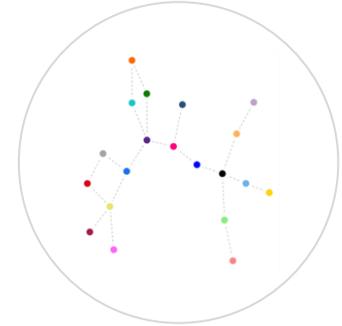
Direct Publisher Integrations

From Publishers and Advertisers we utilize Server-to-Server data, 1st Party IDs, & Media Data



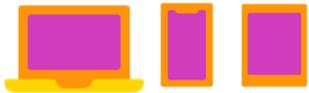
Data validated by real people

The Nielsen Difference:
Utilizing our People-powered panels, we correct biases and combine various data sources to link people and devices in a privacy centric manner

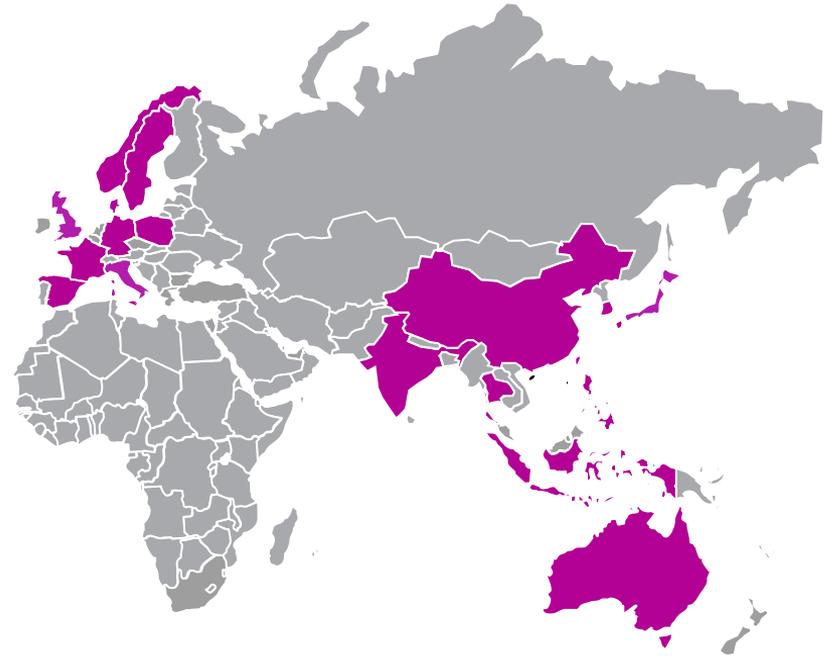
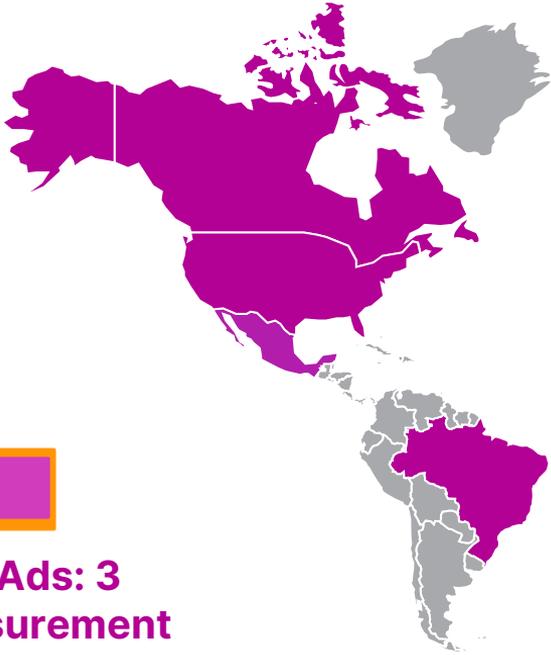


Nielsen ID Graph & External Sources

Proprietary machine learning models that integrate and enrich data across environments to ensure accuracy, comparability and representation in measurement



Nielsen One Ads: 3 Screen Measurement



Australia
Brazil
Canada
China

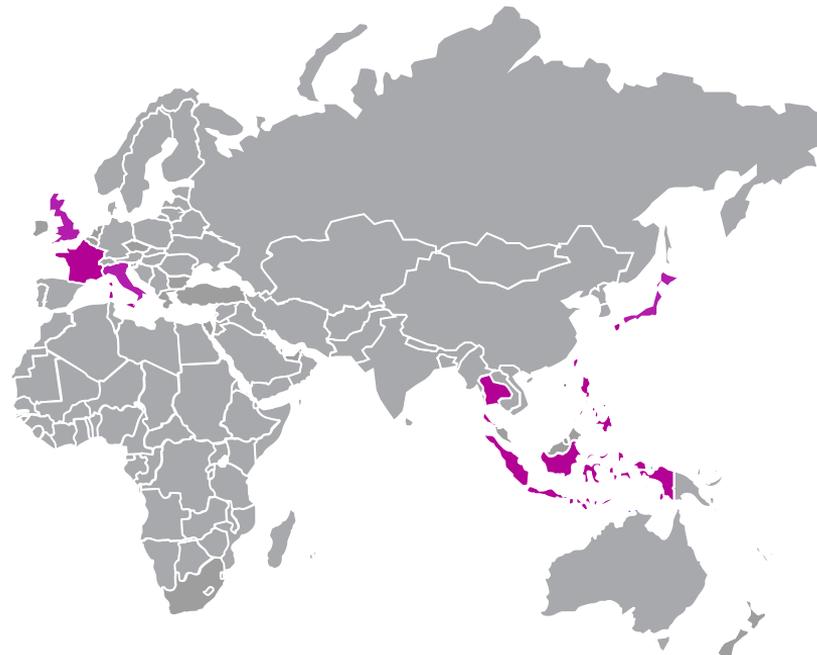
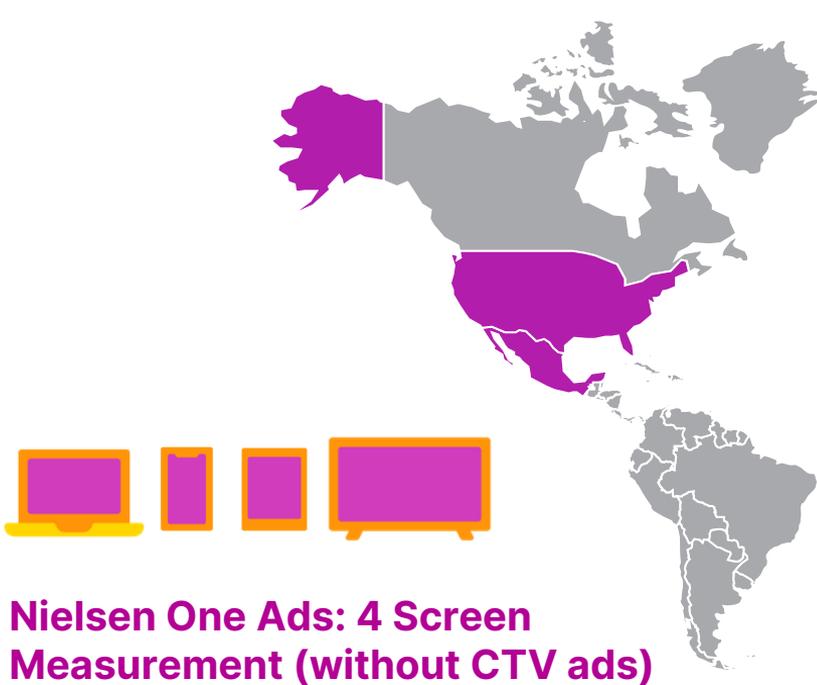
Denmark
France
Germany

India
Indonesia
Italy
Japan

Mexico
Norway
Poland
Philippines

Singapore
South Korea
Taiwan
Thailand

Spain
Sweden
UK
USA



- | | | |
|-----------------|-------------|----------------|
| France (as XCR) | Mexico | Thailand |
| Indonesia | Philippines | United Kingdom |
| Italy | Taiwan | United States |
| Japan | | |

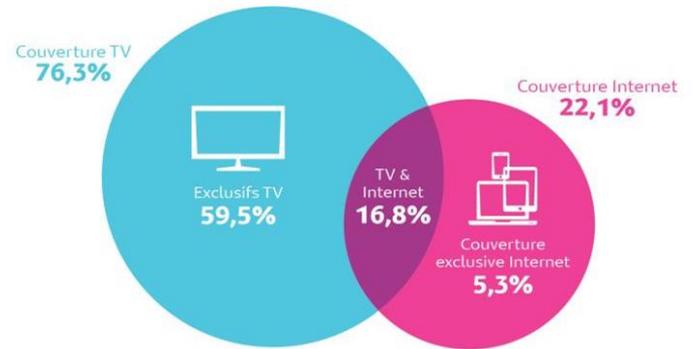
CROSS MEDIA SOLUTION IN FRANCE



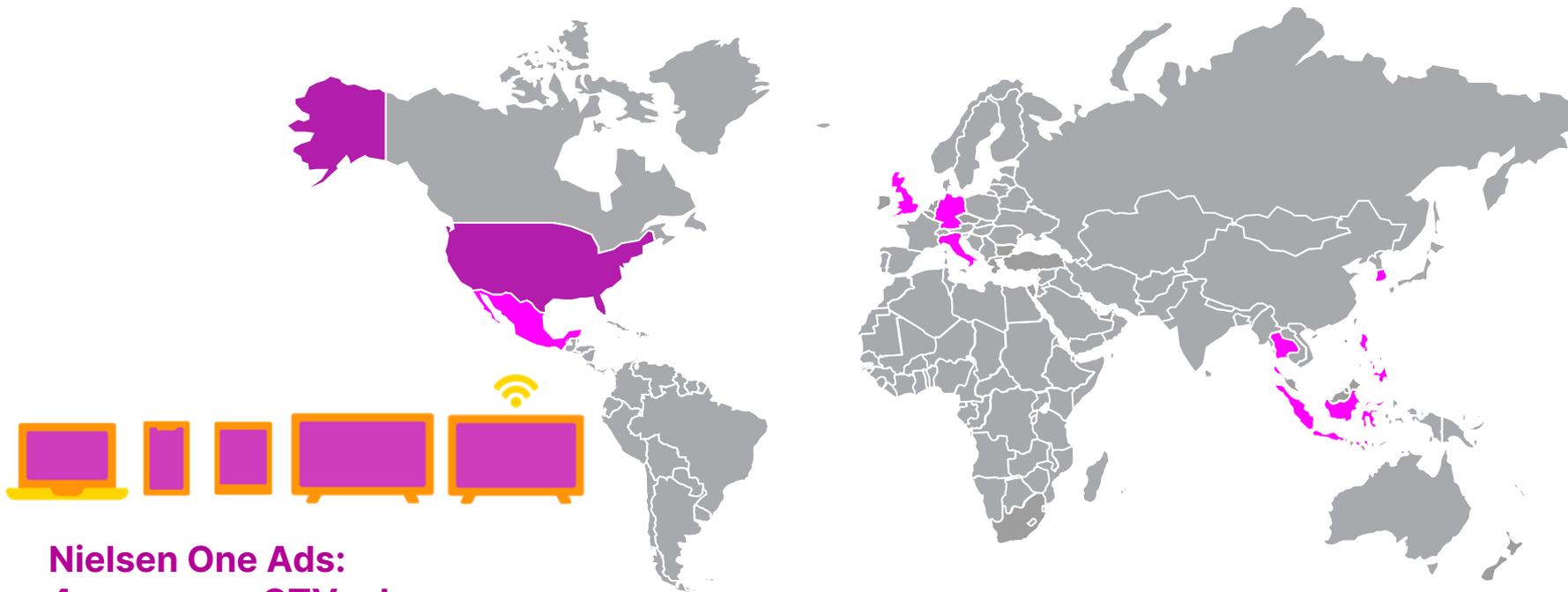
Une couverture Internet incrémentale de +5,3 pts



En moyenne, une campagne Internet permet un apport de couverture de **+5,3 points** par rapport à la couverture TV



Źródło: Médiamétrie//NetRatings-Cross Médias – Population France entière – Normes XCR Janvier 2018



Nielsen One Ads: 4 screens + CTV ads

United States

CTV Launching in 2024:

Indonesia

South Korea

Italy

Mexico

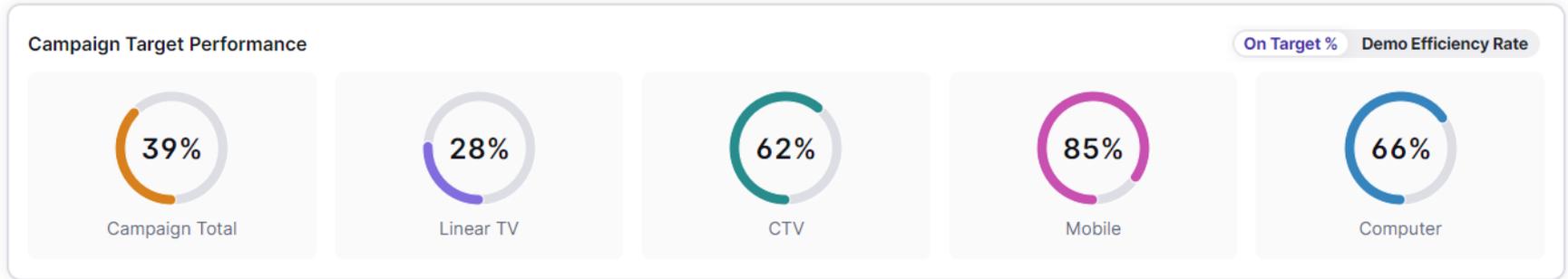
Thailand

Germany

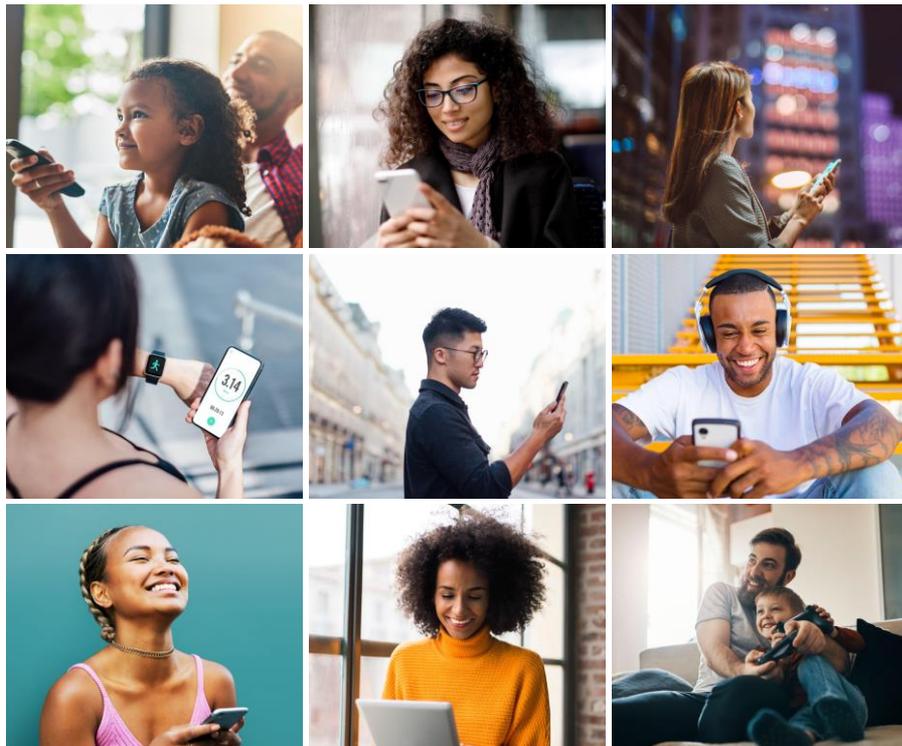
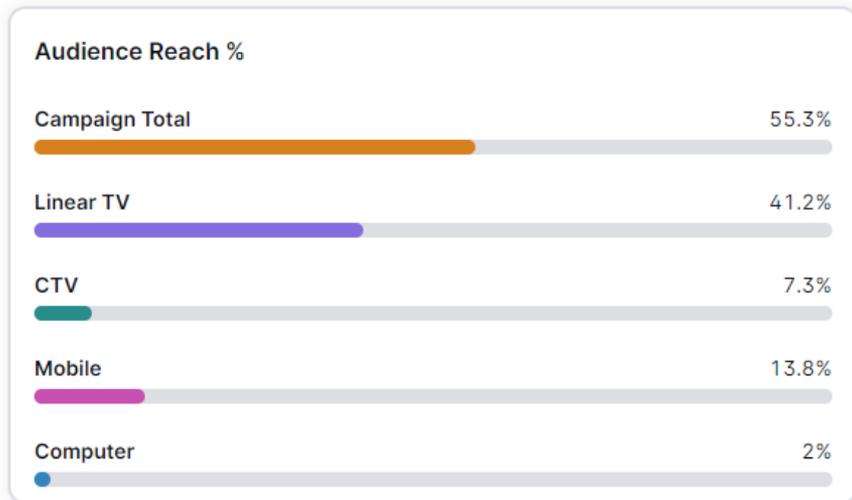
Philippines

UK

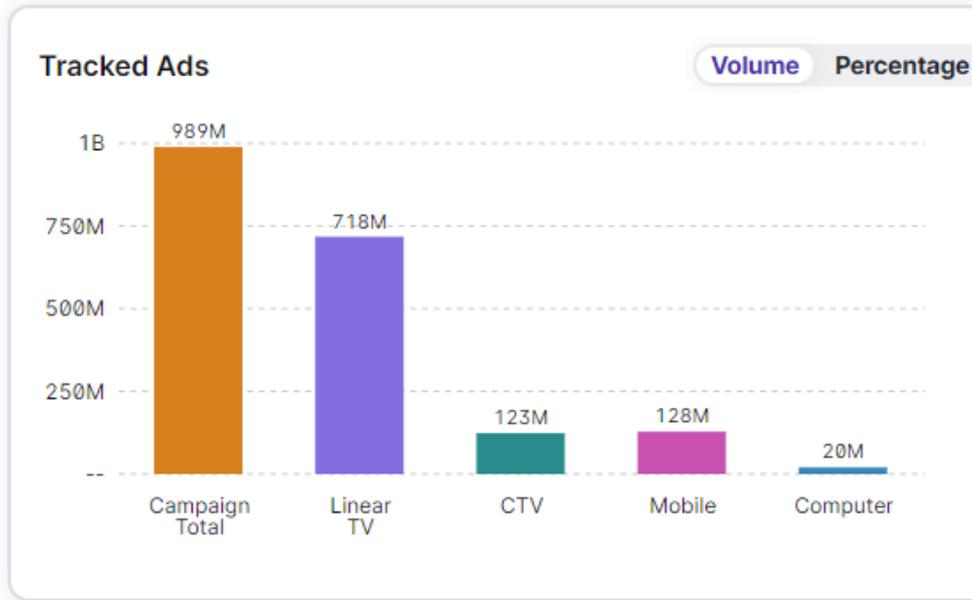
Provides an overview of the **campaign's performance based on target** audience reach: by Platform and in Total



Provides an overview of the **campaign's audience reach by platform**

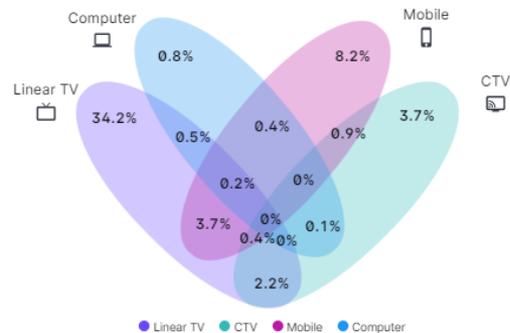


Provides an overview of the **campaign's total ad exposures**



Provides a **deduplicated** analysis of **audiences across** the selected **platforms**

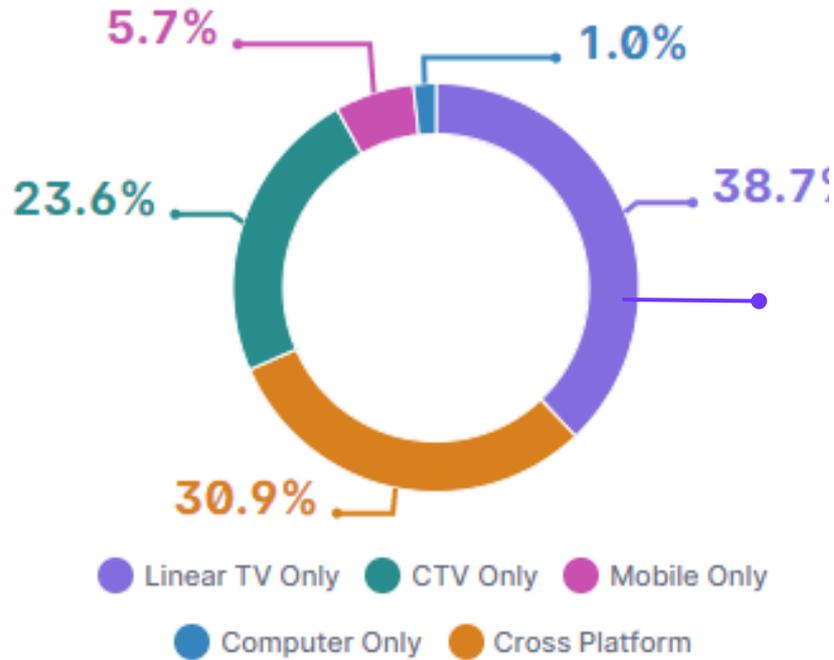
Cross-Platform Deduplication Reach



COMBINATION ↑	REACH	AVERAGE FREQUENCY	UNIQUE AUDIENCE	TRACKED ADS
CTV	3.7%	0.3	11,806,185	87,643,456
CTV + Computer	0.1%	0	244,543	1,419,951
CTV + Mobile	0.9%	0	2,786,878	15,941,758
CTV + Mobile + Computer	0%	0	131,398	1,128,729
Computer	0.8%	0	2,635,401	7,947,730
Linear TV	34.2%	1.9	109,625,199	609,436,329

Provides **incremental reach analysis** across platforms

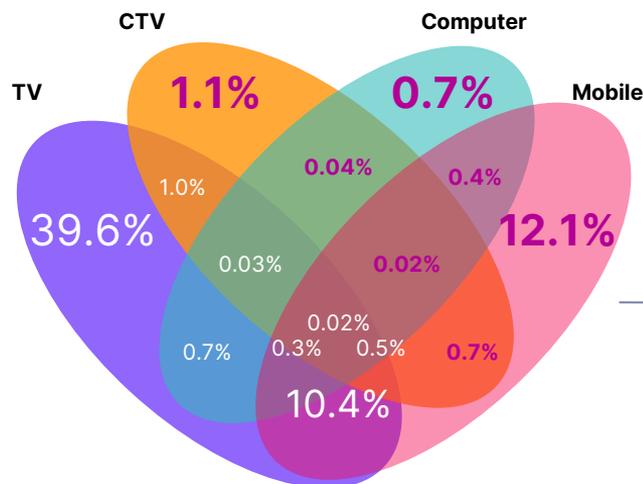
Audience Share by Platform



In a nutshell: four-screen deduplication

New Data Source in Total Ad Ratings that provides 4-way deduplicated reach across TV, Computer, Mobile and CTV

Sample Reporting Insights



Demo: P25-54	Reach %	Unique Audience (000)	Tracked Ads (000)	Average Frequency	GRPS
TV Total	52.5%	66,258	1,697,322	25.6	1,344
Computer Total	2.2%	2,798	7,603	2.7	6
Mobile Total	24.3%	30,677	108,693	3.5	85
CTV Total	3.4%	4,268	10,271	2.4	8
Total Campaign	67.6%	85,295	1,823,890	25.6	1,730

1.1% of P25-54 were reached by **CTV only**, providing a **2.1%** incremental reach to Linear TV

15.1% were reached by **Digital and CTV only**, providing **28.7%** incremental reach to Linear TV

In Closing

Moving measurement into the future



Comparability

Bringing linear and digital together with **the same granularity & deduplicated** for holistic & harmonized metrics.



Coverage

Measurement of all audiences, content and ads, inclusive of **CTV, streaming & addressable** which is **complete and representative**.



Consistency

Independent and durable against future changes in the ecosystem utilizing **cutting edge metering technology** and a **privacy centric** methodology utilizing the **Nielsen ID system**.



Covering Local needs with Global power



2020: Launch of 4 Screen Measurement

- “Who watched what and what time and where?”
- Combining linear **TV and streaming** data to measure & dedup content reach across TV & Digital



2021: Launch of fused OOH data

- “What People Watch Out of Home on TV”
- Fusion of In-Home and OOH data to the one currency



2021: Launch of DAR with new methodology

- “Who watched digital ad and where?”
- De-duplicated age & gender demographics for ad campaigns delivered on digital devices



2022: final stage of Nielsen panel expansion

- Higher accuracy in streaming and TV measurement
- **3500 TV HH** with almost 10K individuals, including 2200 HH with Streaming Meters



2022: Launch of Reconciliation DAI

- Update on the measurement of linear advertising viewing
- Covering the market needs regarding addressable TV

What could be next for Poland

For planning purposes (NMI)

1. Nielsen Media Impact launch
2. Cross market DAR application
3. Total Ad Ratings across linear TV and digital devices
4. Enrich the planning with additional data
 - a. Client's data
 - b. Integration of other media owners (Radio, OOH, Digital, Cinema)

For measuring purposes (N1)

1. Broadcasters and Publishers - integration of SDK for content and ads
2. CTV integration
3. Total Video Audience
4. Joining in Identity Graph developments
5. Adding VOD libraries (content recognition - global and local)
6. PPMs and Radio measuring
7. Integrating additional sources of data (big data integration - RPD)

