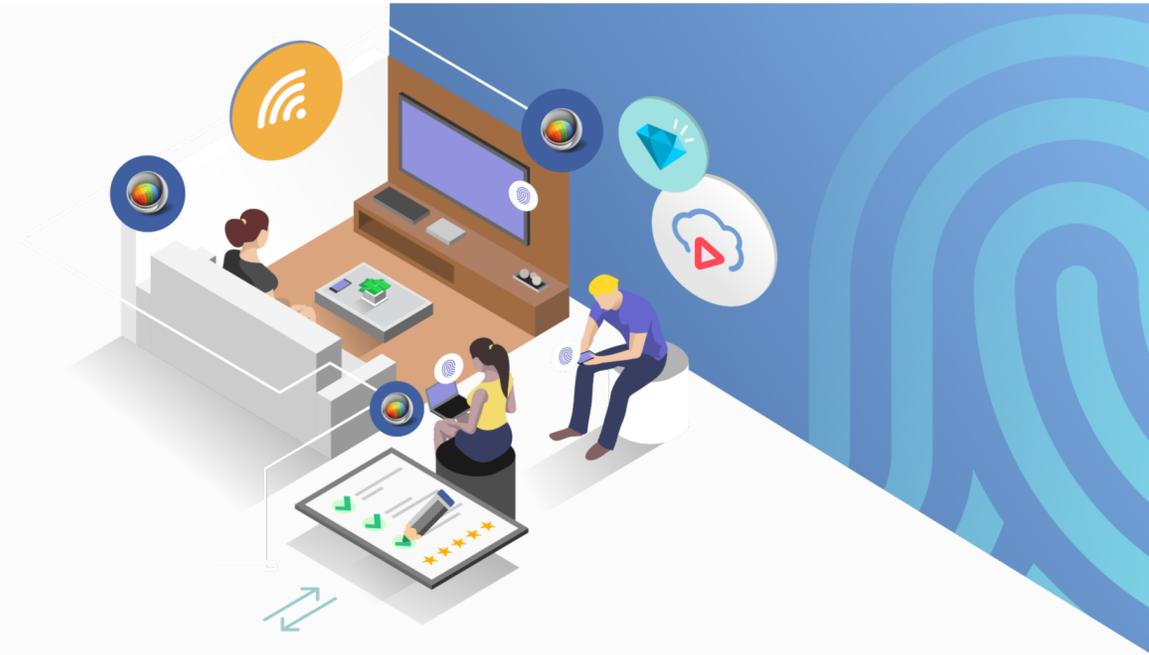


# Enabling state-of-the-art omnimeasurement



**immetrica**

person**all**   
audience is personal

September 2020

# State-of-the-art omnimeasurement

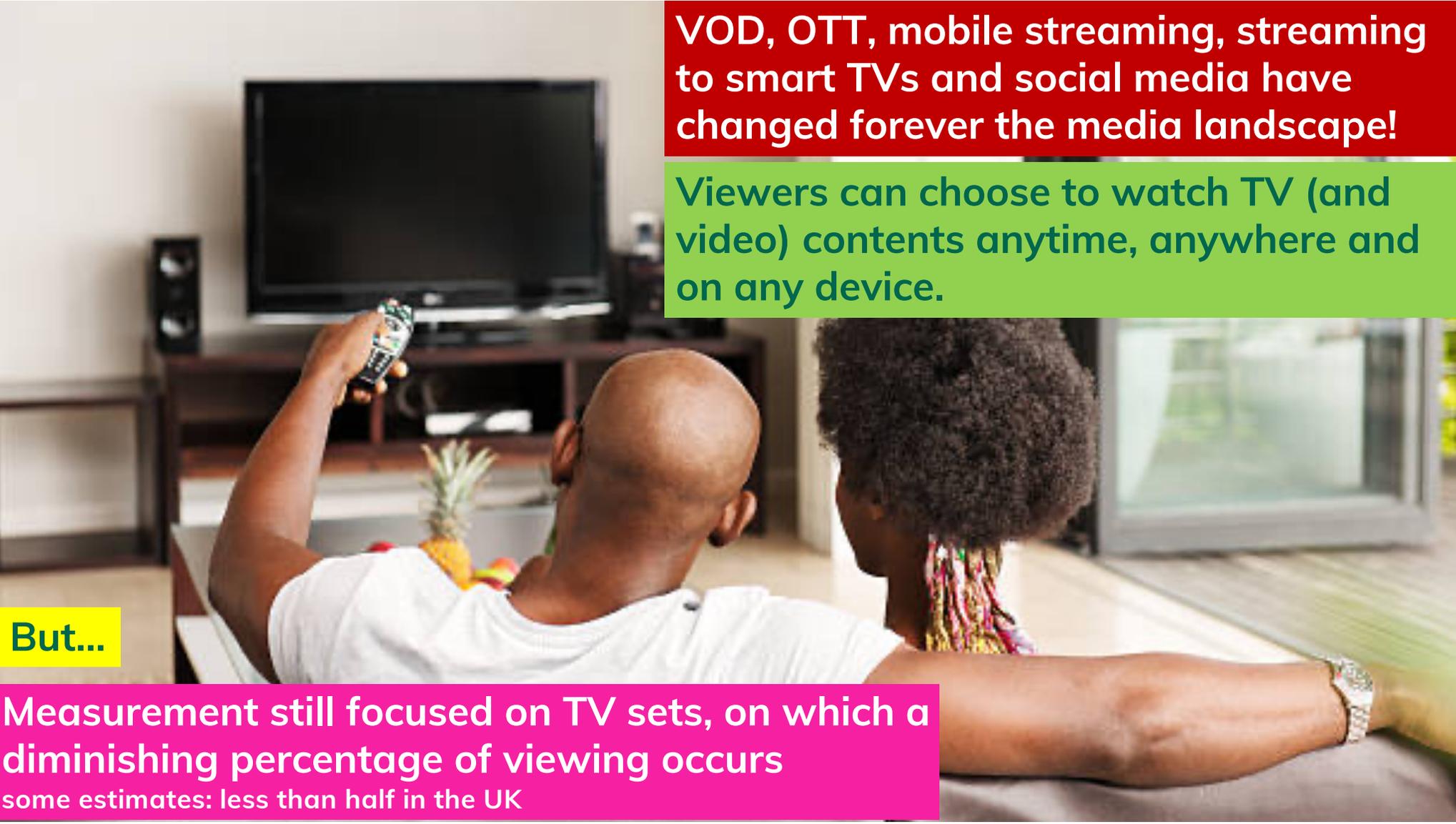
## Current

- People-meters, PPMs, RPD and connected TV data
- People-meters measure fixed home TV sets only for linear and DVR programming only, with personal measurement subject to cooperation error (failure to register viewing)
- PPMs not necessary in daily life and therefore have low cooperation
- No source for complete OTT measurement
- Cross-platform not subject to cume deduplication
- Addressable breaks ad measurement

## Immetrica personall<sup>®</sup>

- All devices, fixed (TV sets, connected TVs, Chromecast/Amazon Fire/Roku Stick), smartphones, tablets, Apple TV, Android TV, any operating system
- Any playout platform (TV, DVR, OTT, Web, social media, in-app, radio, audio streaming)
- Passive electronic measurement for maximum precision
- Granularity: 10 seconds
- Comprehensive, independent OTT service measurement
- Single-source cross-platform and cross-media measurement, deduplicated cume, frequency subject to impressions capping
- Measures “under-addressable” inventory (linear inventory remaining after preemption by addressable)
- Optional: single-source Web and social-network measurement, geolocation, app use, scheduled surveys and instant surveys sent to viewers of specific content (ad creative or program), segmented panels by brand or product segment with gamification

**immetrica**



VOD, OTT, mobile streaming, streaming to smart TVs and social media have changed forever the media landscape!

Viewers can choose to watch TV (and video) contents anytime, anywhere and on any device.

But...

Measurement still focused on TV sets, on which a diminishing percentage of viewing occurs  
some estimates: less than half in the UK



Advertising is now cross-platform: TV-AVOD-online

but...

No comprehensive measurement of OTT/AVOD  
connected TV manufacturers contractually prohibited from  
measuring the top three services, Nielsen US does not measure  
Disney+ or Peacock, almost no data outside the US

and...

No personal or demographic measurement of MVPDs or connected TVs

and...

Cross-platform, reach cannot be deduplicated, impressions cannot be  
capped. Did the buy extend reach or annoy people already exposed?

and...

How much viewing remains net of preemption by addressable?

VOD OTT Smartphones Tablets

With current audience measurement services, audiences will **disappear** where you can count them, and **show up** where you can't see them.

Web Social media In-app

**immetrica**

# Solution: Immetrica personall<sup>®</sup> omnimeter





**Immetrica personall<sup>®</sup>** is the needed advance towards measurement of any screen, anytime, anywhere. It is the first service of its kind able to withstand the cooperation challenges that afflict every other attempt at a personal media measurement device.

Well-run advertisers and media companies must know the effect of those viewers and views, unaccounted for in currency measurement.



The smart  
way to  
measure and  
understand  
your audience  
on all screens

Immetrica personall transforms any smartphone into a Smart People Meter, almost always on the sample member's person or at arm's reach, which identifies any audio-equipped content the sample member consumes anywhere and anytime.

Immetrica personall uses advanced technologies known as ACR (Audio Content Recognition) and audio watermarking. These are integrated into the virtually unkillable, autolaunching code library installed on the smartphones and into the signal monitoring backend. This enables identification, analysis and measurement of any content with an audio track. In addition to quantitative reporting of the viewing of TV shows or specific advertising, Immetrica personall can measure opinion and emotions towards the contents consumed.

**immetrica**

**immetrica**

**personall**  
audience is personal



01

TV programs and advertising creatives (clips) are watermarked and fingerprinted for real-time and timeshifted recognition (DVR/VOD/OTT).

**aws**

02

Realtime and timeshifted viewing is identified up to 24h after broadcast (expandable). Cost-efficient long-term storage of content for identification is also available, for days, weeks, months or years.

03

Fingerprints sent from each sample member's app. Immetrica receives both recognized and unrecognized viewing events from ACR servers.

04

Immetrica transfers these events to panel operator, which surveys sample members who have watched designated content.

Immetrica performs sophisticated processing of the data for audience measurement (channels, programs and advertising spots) and exports fully validated and contextualized data to analytics platform.



- Any screen, anytime, anywhere
- Real-time, timeshifted
- TV, DVR, VOD, OTT, streamers, YouTube, social-media video, radio
- Extensive demographics

immetrica

personall  
audience is personal



# Immetrica personall: for everyone

- 1) Immetrica servers monitor, fingerprint, and store television channels in real time. Advertising spots are also ingested. Watermarks are applied at the content owner or broadcaster's option to enable additional information, such as separation of conventional television, DVR, VOD and OTT.
- 2) Fingerprints and watermarks are sent by the app of the panelist in our sample. Immetrica receives the recognized viewing, via ACR matching, of all monitored channels and advertisements. This is supplemented by optional watermarks to report the precise distribution path.
- 3) Each 10 seconds, fingerprints and watermarks are sent by the app. Timeshifted viewing of realtime channels (using VOD or DVR) can be recognized for a configurable period, e.g., 3 days, 7 days, 21 days, 28 days.
- 4) Viewing to designated content (advertisements or programmes) triggers survey dispatch to panelists. Scheduled questions can also be served to panelists.
- 5) Immetrica personall executes sophisticated processing of the data to measure the audience, export the validated data and identify each platform, releasing results to clients.

# Immetrica personal: for everyone

- Sample as large as required
- As few or as many channels as desired
- Advertisements detected and reported separately, no need to derive from channel data
- Minimum detectable ad duration: 15 seconds
- Viewing of the same ads on means other than conventional TV detected
- Can optionally report sources other than conventional TV, using watermarks
- Full use of available demographics, weighted sample if necessary

# Immetrica personall: for everyone

Understanding the potential of Immetrica personall® allows to better understand audiences and to measure ad and communication campaigns' performances in multi media-platforms.



*Multiscreen*

All platforms  
Apps on mobile devices



*Available in near-realtime*

Identifies and captures  
realtime TV viewing, as well  
as DVR, VOD (video on  
demand), OTT (over-the-  
top), YouTube, social media

# Immetrica personall: for everyone



## *Surveys*

Automated  
(upon viewing of a designated ad)  
Periodic  
Special



## *Segmented profiles*

Complete audience  
demographics, consumer  
habits, social-media use  
more than 200 data points  
extensible per client

# Immetrica personal: for advertisers



*Single-source measurement of  
multiplatform campaigns*

Audience data (reach and frequency) of  
media campaigns, TV, social-media  
videos or sponsorships on the Web



*Brand KPIs  
Campaign ROI*

Key performance indicators: recall,  
recognition, brand affinity, purchase  
intention, purchase, satisfaction,  
consumption, repurchase, NPS (net  
promoter score: willingness to  
recommend)

# Immetrica personall: for everyone



## *Retargeting*

Actual audience obtained to target audience  
Cross-platform

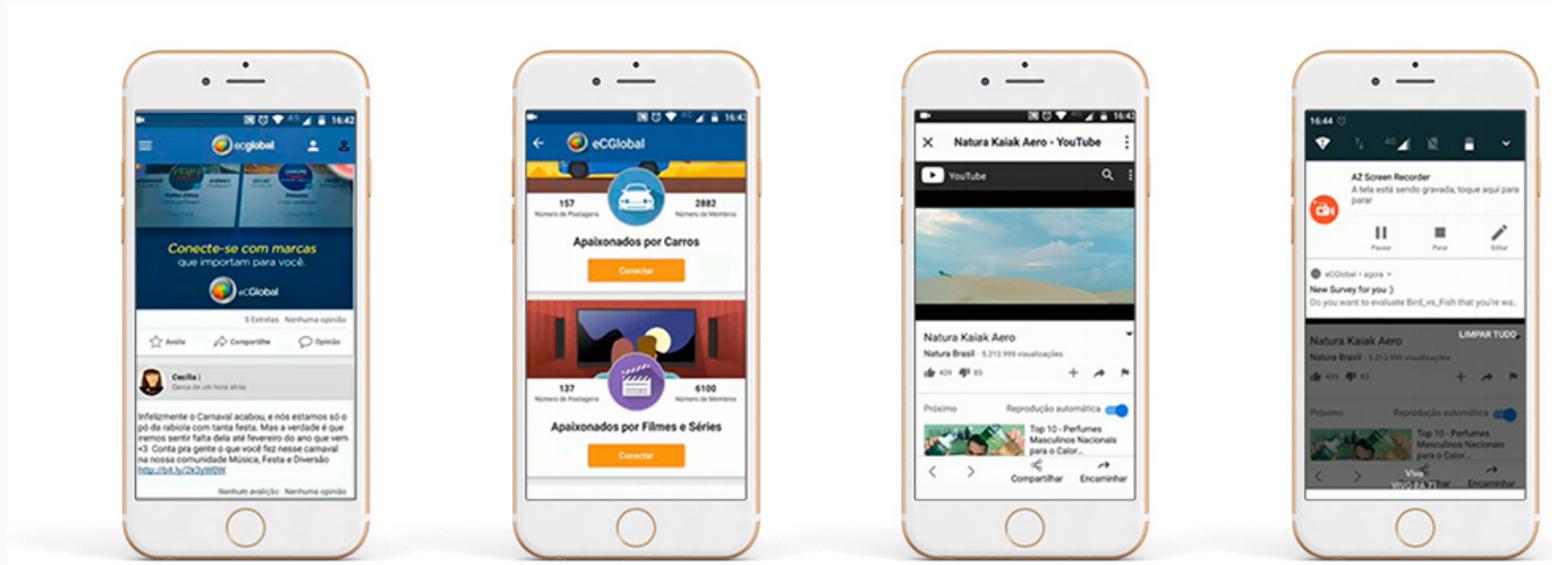


## *Motivators*

Complete consumer journey

# Immetrica personal: campaign impact beyond R&F...

Apart of knowing how many times, by which percentage of people, for how long or on which platforms your target saw your ad, Immetrica personal allows to measure campaigns' performance indicators.



# Immetrica personal: campaign impact beyond R&F...

With Immetrica personal, one can finally understand multiplatform campaigns' performance and identify those consumers which were impacted by several channels and had a brand experience on diverse screens.

Examples:

- What was the percentage of consumers impacted by TV and by social media?
- Which multiplatform media plan attained the best ROI for the brand?
- What was the total reach of the media campaign considering TV + social media + apps?



# Immetrica personall: comprehensive OTT measurement

- Entire Netflix or Amazon Prime Video library ingested in under one month
- Content remains so long as it is available to subscribers
- Timely updates for ever-changing content libraries



# Brazil pilot study

## Study parameters

- National coverage with skew to metropolitan areas
- 27 monitored channels (5 FTA networks and 22 pay-TV channels)
- Weeks 36-53 2018 and Weeks 1-9 2019
- Naturally recruited sample (without targeting)
- 233 average daily cooperators, intab 191
- Adults 24-44 (average age 37)
- 81% pay TV households
- A-B-C SES with minor D and no E

## Results summary

- High stability week-to-week
- Ratings align closely with currency provider's people-meter subsamples: comparable by age, pay-TV status and socio-economic class
- 17.2% full-day, 19.1% primetime same-day viewing time-shifted beyond 10 minutes
- 84 advertisements fingerprinted. All recognized for a total of 9,442 impressions between 24 August 2018 and 9 February 2019
- 12% of advertisements from new-technology viewing, including social media and DVR time-shifting beyond same-day.

**Viewing Closely Mirrors Market Currency Data 27**  
 monitored channels  
 (5 FTA networks and 22 pay-TV channels)

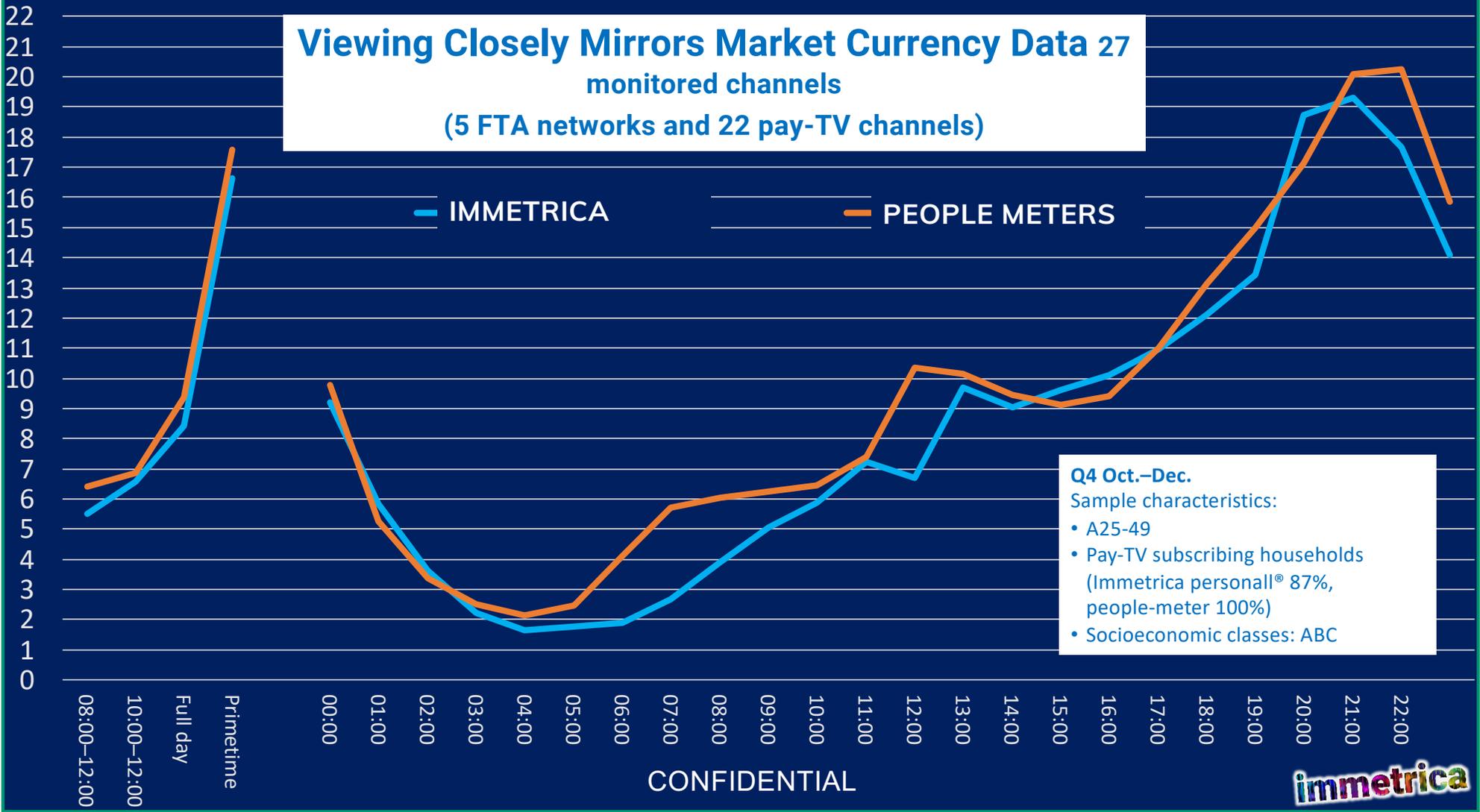
— IMMETRICA

— PEOPLE METERS

**Q4 Oct.–Dec.**

Sample characteristics:

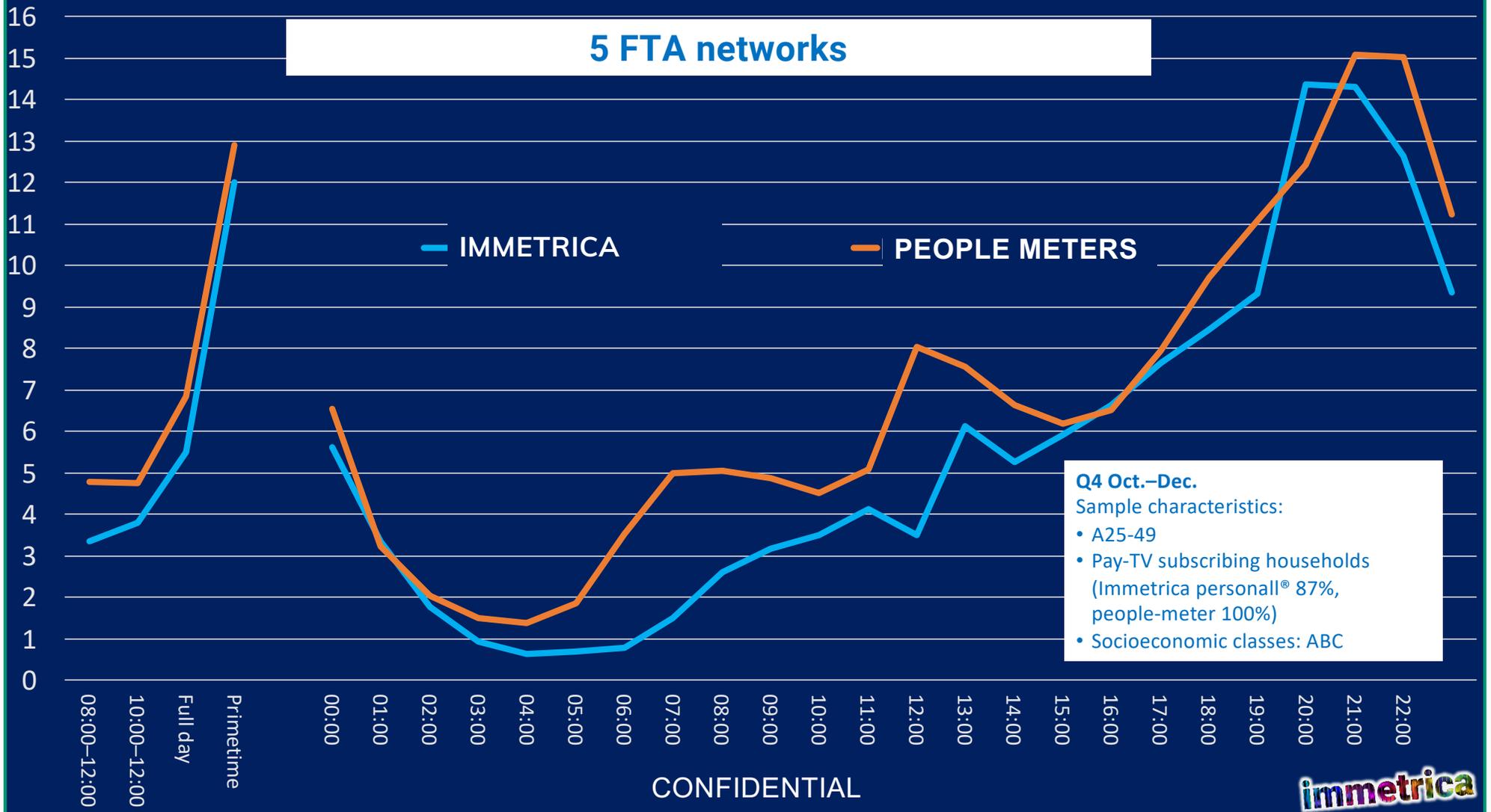
- A25-49
- Pay-TV subscribing households  
 (Immetrica personal<sup>®</sup> 87%,  
 people-meter 100%)
- Socioeconomic classes: ABC



CONFIDENTIAL



## 5 FTA networks



Q4 Oct.-Dec.

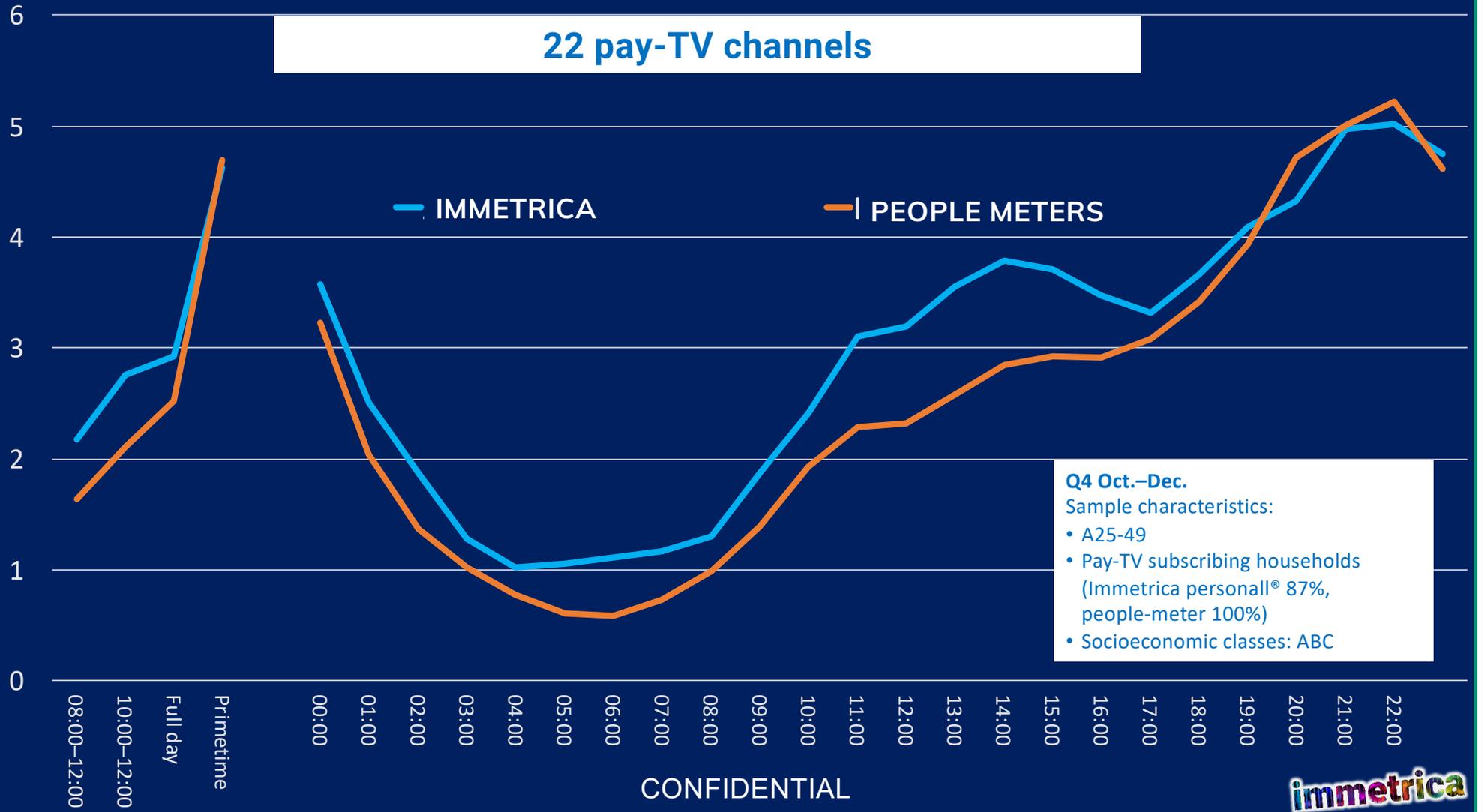
Sample characteristics:

- A25-49
- Pay-TV subscribing households (Immetrica personal® 87%, people-meter 100%)
- Socioeconomic classes: ABC

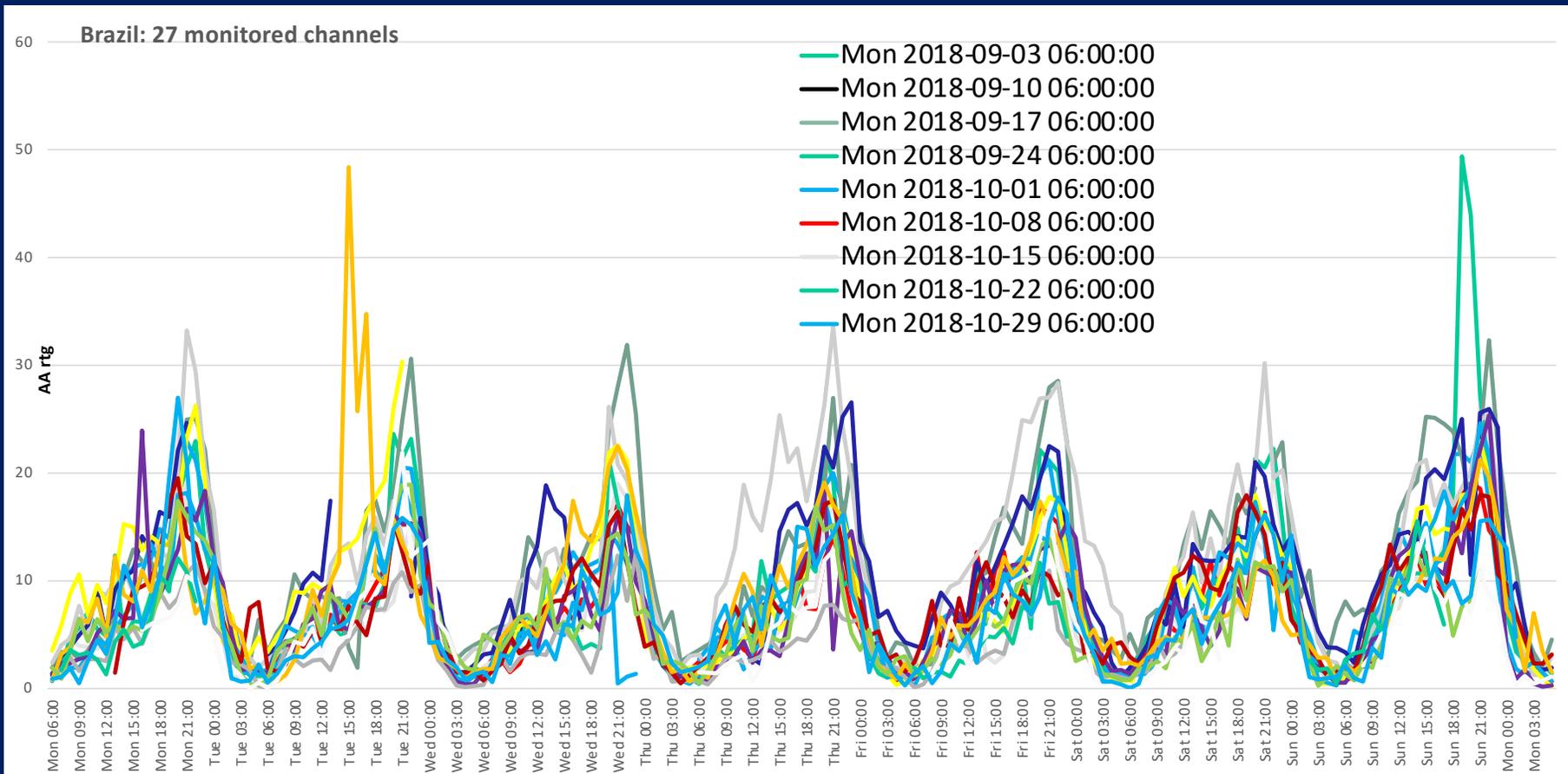
CONFIDENTIAL

immetrica

## 22 pay-TV channels



# Performance, stability and reliability



CONFIDENTIAL

# EFFECT OF NETFLIX IN BRASIL

personall 

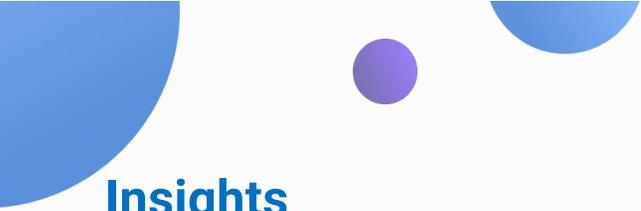


## Netflix subscription status has significant impact on viewing to largest television networks in Brazil

	Minutes of Viewing			
	<i>Normalized to account for Netflix / Not Netflix Sample Size Differences</i>			
	Total	Netflix Subscriber	Not Netflix Subscriber	Difference
<b>Globo</b>	743,160	311,190	431,970	<b>-28%</b>
<b>SBT</b>	248,994	110,346	138,648	<b>-20%</b>
<b>Record TV</b>	172,692	98,820	73,872	<b>34%</b>
<b>Band Sao Paulo</b>	78,848	40,656	38,192	<b>6%</b>
<b>RedeTV!</b>	52,155	26,535	25,620	<b>4%</b>
<b>All monitored channels</b>	2,109,675	1,055,355	1,054,320	<b>0%</b>

Sample sizes: 300+ Netflix subscribers per network, 100+ non-Netflix subscribers per network

How to read: Netflix subscribers watched 28% less Globo network and 20% less SBT than non-Netflix subscribers.



## Insights

1. The impact of Netflix is significant on market leaders Globo and SBT, with 28% and 20% less viewing respectively by Netflix subscribers.
2. The Netflix subscriber status does not impact television networks with lower viewing levels in the same way as the market leaders, with viewing slightly higher on Band Sao Paulo (6%) and RedeTV! (4%) and 34% higher on Record.
3. Looking at total television viewing, Netflix subscribers view the same amount of television overall as non-Netflix



# A STUDY FOR COCA-COLA

Christmas “Polar  
Bear” Campaign



Free-to-air networks

Pay-TV channels

Social networks



## Reach, Impressions, Frequency and Incremental Reach

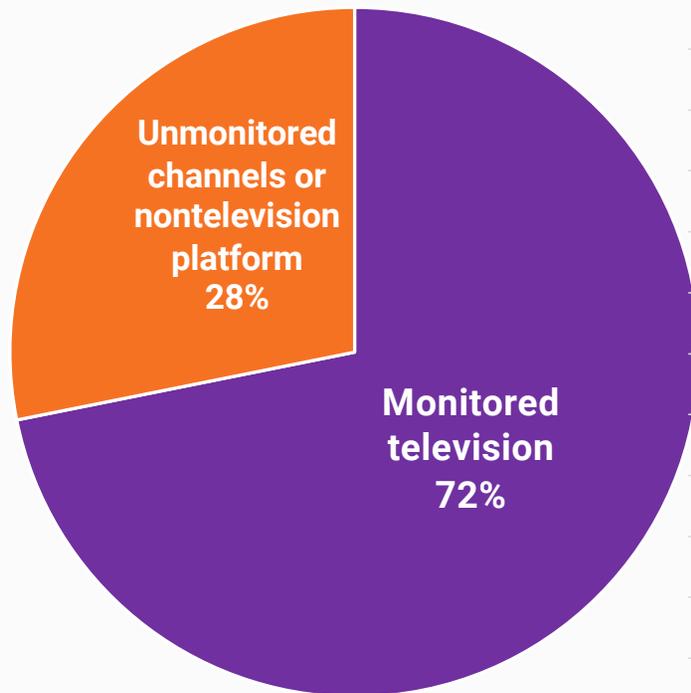
	Number of Panelists Exposed to Campaign (Reach)	Incremental Reach %	Impressions	Frequency
<b>All sources</b>	182		578	3.18
<b>Monitored television channels</b>	123		416	3.38
<b>Unmonitored channel or Non-TV Platform</b>	97		163	1.68
<b>Incremental Reach from Unmonitored/Non-TV platform</b>	<b>59</b>	<b>32%</b>		

### Reach & frequency

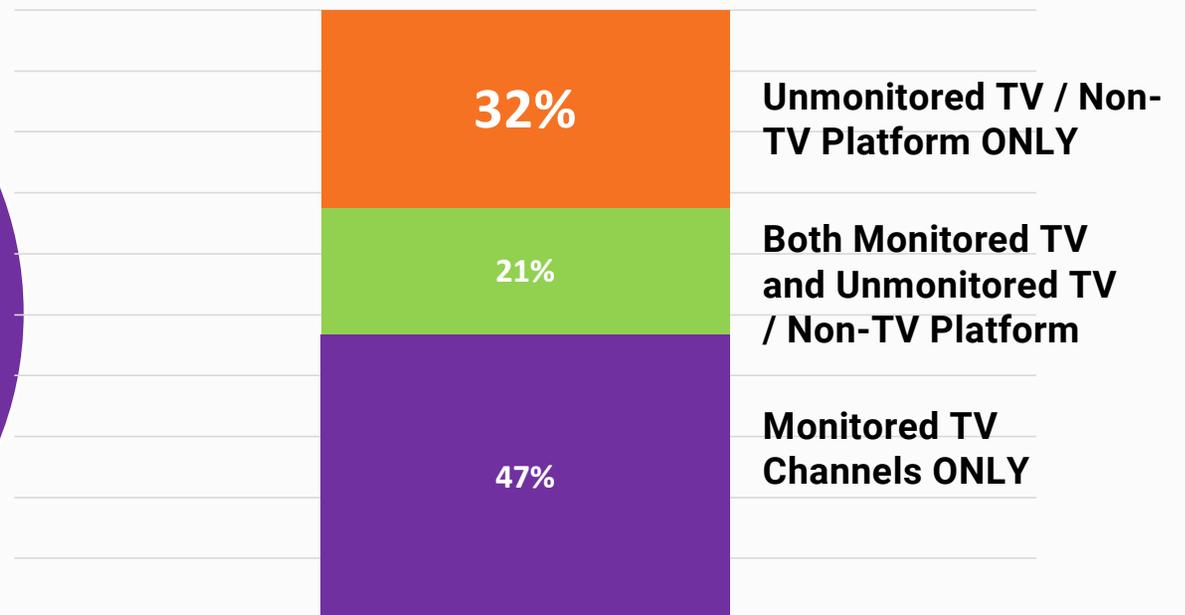
Impressions per panelist	1+	1	2	3	4	5	6	7	8
<b>Panelists</b>	182	72	36	25	9	6	11	8	4
<b>% of panelists</b>	100%	40%	20%	14%	5%	3%	6%	4%	2%



## Impressions



## Incremental Reach



600

500

400

300

200

100

0

**Build of** — Reach — Impressions

2018-11-22  
 2018-11-23  
 2018-11-24  
 2018-11-25  
 2018-11-26  
 2018-11-27  
 2018-11-28  
 2018-11-29  
 2018-11-30  
 2018-12-01  
 2018-12-02  
 2018-12-03  
 2018-12-04  
 2018-12-05  
 2018-12-06  
 2018-12-07  
 2018-12-08  
 2018-12-09  
 2018-12-10  
 2018-12-11  
 2018-12-12  
 2018-12-13  
 2018-12-14  
 2018-12-15  
 2018-12-16  
 2018-12-17  
 2018-12-18  
 2018-12-19  
 2018-12-20  
 2018-12-21  
 2018-12-22  
 2018-12-23  
 2018-12-24  
 2018-12-25



33%  
Reach

immetrica



77%

*Coca-Cola*

spontaneous recall  
*(any Coca-Cola ad  
in past week)*

100%

stimulated recall  
*(Polar Bear ad past week)*

## Insights

1. 72% of impressions were from monitored TV channels; 28% of impressions were from non-monitored TV channels and non-TV Platforms, including social media, web and AVOD.
2. 68% of consumers exposed to the ad were reached on TV. Unmonitored TV channels and Non-TV Platforms delivered 32% incremental reach.
3. Non-TV platforms delivered less frequency, at 1.68 vs 3.38 for monitored TV channels
4. Viewing to “Unmonitored TV channels and non-television platforms” was comprised mainly of non-TV platforms, such as social media, web and AVOD.
  - Pay-TV contributed relatively little (the ad was detected on only 6 of the 22 monitored pay-TV channels and contributed only 7% of reach and 2% of impressions). Unmonitored channels therefore do not include these 22.
5. The campaign achieved efficient frequency, with 74% of panelists with 1–3 frequency and 20% with 4–8 frequency.

The Coca-Cola logo is displayed in its classic red script font.The logo for immetrica, featuring the word in a lowercase, multi-colored font.

# AZTECA HONDURAS FLOW/CROSSOVER

personall 



Sunday, 16 February

20:00 Camino a la fama

22:00 La academia,

semifinal



## Lead-In Analysis

Warning: these measurements were taken during service setup, when the intab was low. The intab was below measurable standards for decision-making. This case study is intended to demonstrate Immetrica personall<sup>®</sup> analytical use and not to inform decisions.



		Azteca Honduras					
		Camino a la fama			La academia, semifinal		
Azteca Honduras	Completion rate	Number Panelists	Percent of Panelists	Hours Viewing to Camino a la fama on Azteca Honduras	Number Panelists	Percent of Panelists	Hours Viewing to La academia on Azteca Honduras
Camino a la fama 20:00–22:00	Total	21		0:34:06	14	67%	0:31:54
	<25% of show	12	57.14%	0:07:53	6	50%	0:15:15
	25%+ of show	9	42.86%	1:09:04	8	89%	1:21:50

Camino a la fama is strong lead in to La academia, with heavy viewers retaining 89% of the audience and light viewers retaining 50%.

# Competition

Warning: these measurements were taken during service setup, when the intab was low. The intab was below measurable standards for decision-making. This case study is intended to demonstrate Immetrica personall<sup>®</sup> analytical use and not to inform decisions.



		Televiscentro 5			Telesistema Informativa			HCH			Q'Hubo TV		
Azteca Honduras	Completion rate	Number of panelists with viewing to competitor in prime time	Percent of Panelists	Hours viewing to all other monitored channels in prime time	Number of panelists with viewing to competitor in prime time	Percent of Panelists	Hours viewing to all other monitored channels in prime time	Number of panelists with viewing to competitor in prime time	Percent of Panelists	Hours viewing to all other monitored channels in prime time	Number of panelists with viewing to competitor in prime time	Percent of Panelists	Hours viewing to all other monitored channels in prime time
		<b>Camino a la fama 20:00–22:00</b>	<b>Total</b>	16	76%	0:02:36	11	52%	0:06:23	9	43%	0:23:03	13
	<b>&lt;25% of show</b>	10	83%	0:03:53	5	42%	0:12:11	5	42%	0:31:28	7	58%	0:00:39
	<b>25%+ of show</b>	4	44%	0:00:28	6	67%	0:01:06	4	44%	0:11:09	6	67%	0:15:41

Camino a la fama heavy viewers are loyal to Azteca Honduras, watching far less competitor programming (Televiscentro, Telesistema, HCH) in prime time. Loyal viewers watched more Q'Hubo than light viewers.



## Insights

Warning: these measurements were taken during service setup, when the intab was low. The intab was below measurable standards for decision-making. This case study is intended to demonstrate Immetrica personal<sup>®</sup> analytical use and not to inform decisions.

1. *Camino a la fama* is a powerful lead-in to *La academia*, semifinal.
2. The percentage of time spent viewing to *La academia* relative to TSV to *Camino* is greater among lighter viewers of *Camino*.
3. Almost all *Camino* viewers who did not continue into *La academia* were among the lightest (under 25% of the programme).
4. While all *Camino* viewers and almost all *La academia* viewers watched one or more of the top four channels in the same primetime block, medium (25–75%) and light (under 25%) *Camino* viewers and light *La academia* viewers also viewed substantial TSV to other channels.
5. Both *Camino* and *La academia* viewers made almost no same-primetime use of Televiscentro 5, the leading network in Honduras according to the recall (diary)-based incumbent currency provider and occasional leader in our measurement.
6. The usual leader in our measurement, digital-only news channel HCH, received most of the viewing by *Camino* and *La academia* viewers.
7. Two other news channels, Q'Hubo TV and Corporacion Televiscentro's Telesistema Informativa, both received more viewing than the general-entertainment (variety) Televiscentro 5.





**Immetrica is a Boston-based audience measurement specialist, building audience research systems and conducting audits for more than three decades.**

Serving major television, radio, pay-TV and DVR players around the world;

Pioneers: first time-shifted viewing ratings in the US, first extrapolation of STBs to households in the world, and first adjustment for HD representativeness in the world.

Immetrica currently operates or has planned operations in

- Brazil
- Honduras
- Pakistan: launch
- Bangladesh: pilot with commercial sample
- USA: development in progress
- Mexico: proposals in process
- Nigeria: pilot in approval
- Belarus: test with currency provider in progress
- Ghana, Uganda, Kenya, Tanzania: development in progress
- Malaysia: in RFP


# Thank You

**Boris Levitan**

Founder & CEO,  
Immetrica

[boris@immetrica.com](mailto:boris@immetrica.com)

+1 857 891 4000

