



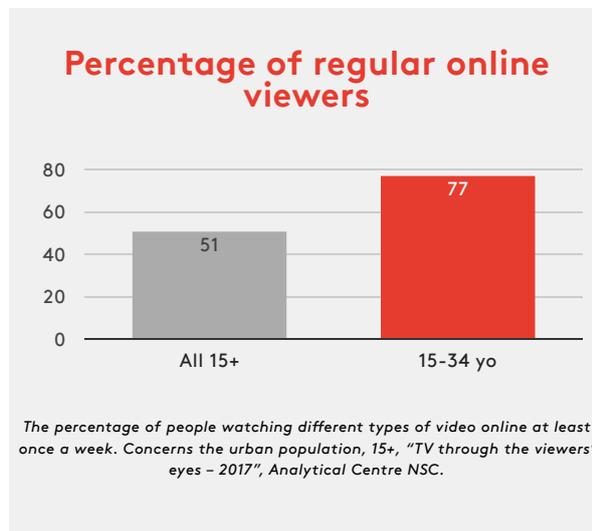
**ANNA  
VORONTSOVA**

# Big TV Rating: optimizing TV measurement across all distribution environments

Media Analyst, Video International

One of the more evident challenges that TV ad markets are facing worldwide – the Russian market being no exception – is the rise in new video services, offering a bewildering array of options to suit every taste and budget.

In 2017, 51% of the Russian urban population regularly (at least once a week) watched different types of online video content. This habit is almost universal among young people: in 2017, 77% of 15-34 age group regularly watched VOD online. The video menu offers all sorts of video on demand, including professional video (movies, TV series), semi-professional video (produced by vloggers, for example) and various UGCs. The readily available access to new forms of video is inevitably at the expense of TV viewing. Ad budgets follow suit with new publishers.



**//  
TV content is  
now available  
on numerous  
digital  
services.**

## **About the Big TV Rating**

Big TV Rating is a sales product addressing serious challenges in the Russian TV advertising market: the shortage of TV inventory due to a decrease in traditional TV audiences, and a slump in TV ad spends as a result. These difficulties are well known across the board in developed markets. In addition, the Russian market is facing other overall challenges. The Big TV Rating product has been designed and put into action in close collaboration with TV channels and the TV audience data supplier, Mediascope.

Outside competition for the TV industry is just one part of the story. TV content (live and on demand) is now available on numerous digital services and lots of people watch TV on multiple screens, "anytime, anywhere". Needless to say, these viewers often slip under the radar of the TV audience measurement system.

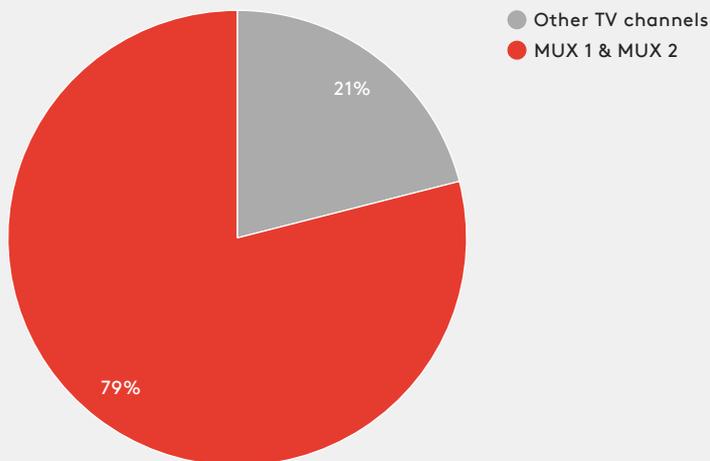
Challenges across the Russian market stem from TV regulation legislation and decisions made by different market players early

on in the digital period. According to the "must carry" regulation, Pay TV operators have to provide a package of 20 TV channels (the most popular) free of charge. It comes from the idea that TV is a "public good", a notion from the shortage

period and is still present in the digital era. The combined share of these 20 TV channels in 2017 accounted for 79% of TV audience<sup>1</sup>.

## Audience share

of "must carry" (MUX 1 and MUX 2) and other TV channels



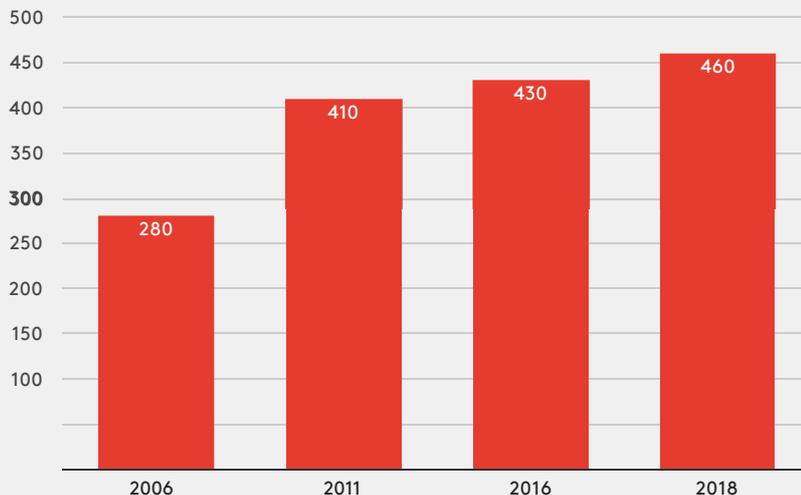
The breakdown of TV audiences by "must carry" and other TV channels. Mediascope, Russia, 100K+, 4+, 2017.

About ten years ago – adhering to the "public good" concept and upholding the modern "digital" image – many TV channels made their live "on demand" broadcasting and content available for the viewers via OTT also free of charge with no subscription required. Pirates didn't miss the chance to develop hundreds of platforms, fill them with TV content (live and on demand) and make a living from trafficking and commercials.

As a cumulative result, TV inventory gradually and painfully decreased for the market. Every year, a typical TV advertising campaign needs more and more GRPs to reach the same target goals. For example, to reach 80% of the 14-59 age group across all TV channels, it took 280 GRPs in 2006 and one and a half time more in 2016 – 430 GRPs. The audience moves towards online and digital services while ad budgets follow suit, but publishers aren't reaping the benefits. At best, publishers receive 30% to 40% of ad budgets, accumulated from online TV content.

//  
**Every year, a typical TV advertising campaign needs more and more GRPs to reach the same target goals**

## Amount of GRPs



Number of GRPs needed to reach 80% of the 14-59 age group across classic TV. Based on Mediascope TV audience data (Russia, 100K+, 4+).

The main objective of the Big TV Rating product is to provide a more suitable setting for TV channels' online development using different OTT-services.

The solution is to provide advertisers with high-quality inventory of professional and brand-safe TV content, regardless of the distribution environment. To put the project in place, TV channels keep the same schedule with ad blocks and the same commercials across all distribution environments, live and 7-day catch up. To make the number of online views visible for the measurement system, TV channels install Mediascope "heartbeat" tags on play lists at a frequency of 30 seconds, and special scripts for the players. After a 7-day period, TV channels cut the commercials from catch-up content and monetize the content as online video.

Big TV Rating provides the market with a unified TV inventory (the same GRP at a unique price) and the full kit of marketing tools the market is used to. The unified TV inventory is available for media planning, buying/programmatic buying and reporting GRP on the ViMB platform.<sup>2</sup>

//  
**Big TV  
Rating  
provides the  
market with  
a unified TV  
inventory**



**7**

**TV channels are expected to be on the Big TV Rating list by the end of 2018.**

Rolling out the new product in 2018 brought incremental TV inventory to the market and helped reduce the tension caused by its ever-increasing shortage. Sales houses hopefully see it as a means to reduce the sell-out in the upcoming year from 100% to 95%. TV channels participating in the project earned an added profit and learned much more about their shows' online content consumption. The project started in January 2018 with 4 TV channels participating, and 7 TV channels are expected to be on the Big TV Rating list by the end of 2018.

At the moment, Big TV Rating measurements are limited to desktop consumption of online TV content. Mobile TV viewing is set to be measured in the second half of 2018. The product is promising for the market on the whole, though slightly unsure for advertisers, who currently get all the mobile impressions for free. There's no doubt that comprehensive, detailed information about the advertising campaign is worth way more than a freebee giveaway. **X**

#### SOURCES

<sup>1</sup>According to Mediascope, Russia, 100k+, 4+, 2017; <sup>2</sup>ViMB is a tech platform, developed by NSC Company for the "National Advertising Alliance" sales-house. The platform provides a complete cycle of ad sales across the board, including TV ratings forecasts, planning, legal review, accounting, reporting etc.