

A silhouette of a human head in profile, facing left. The interior of the head is filled with a complex network of white circuit lines and small colored dots (red, blue, yellow, green) representing data or neural activity. An orange line extends from the right side of the head towards the text 'Engaging with today's always-on viewer'.

Engaging with today's  
always-on viewer

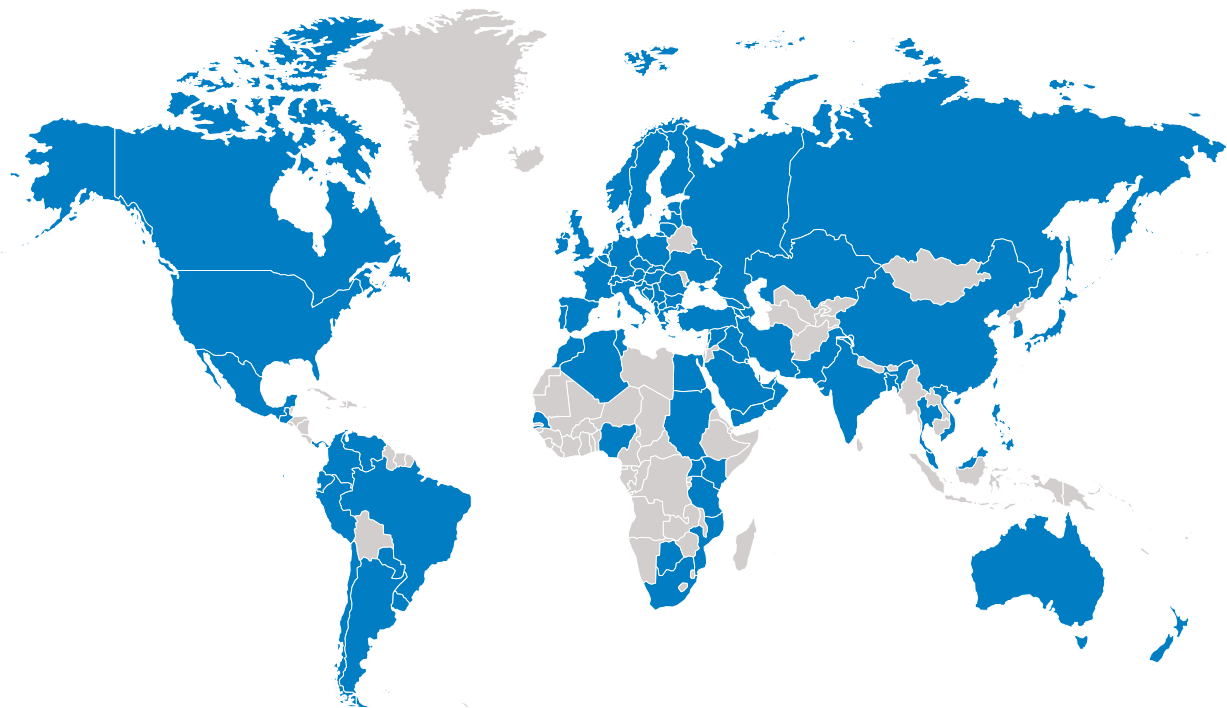
**IABM Annual International  
Business Conference  
Thursday 3<sup>rd</sup> December, 2015**

**Niko Waesche,  
Global Industry Lead,  
Media & Entertainment, GfK**

# Introducing GfK: By using technology and data sciences, we turn big data into smart data



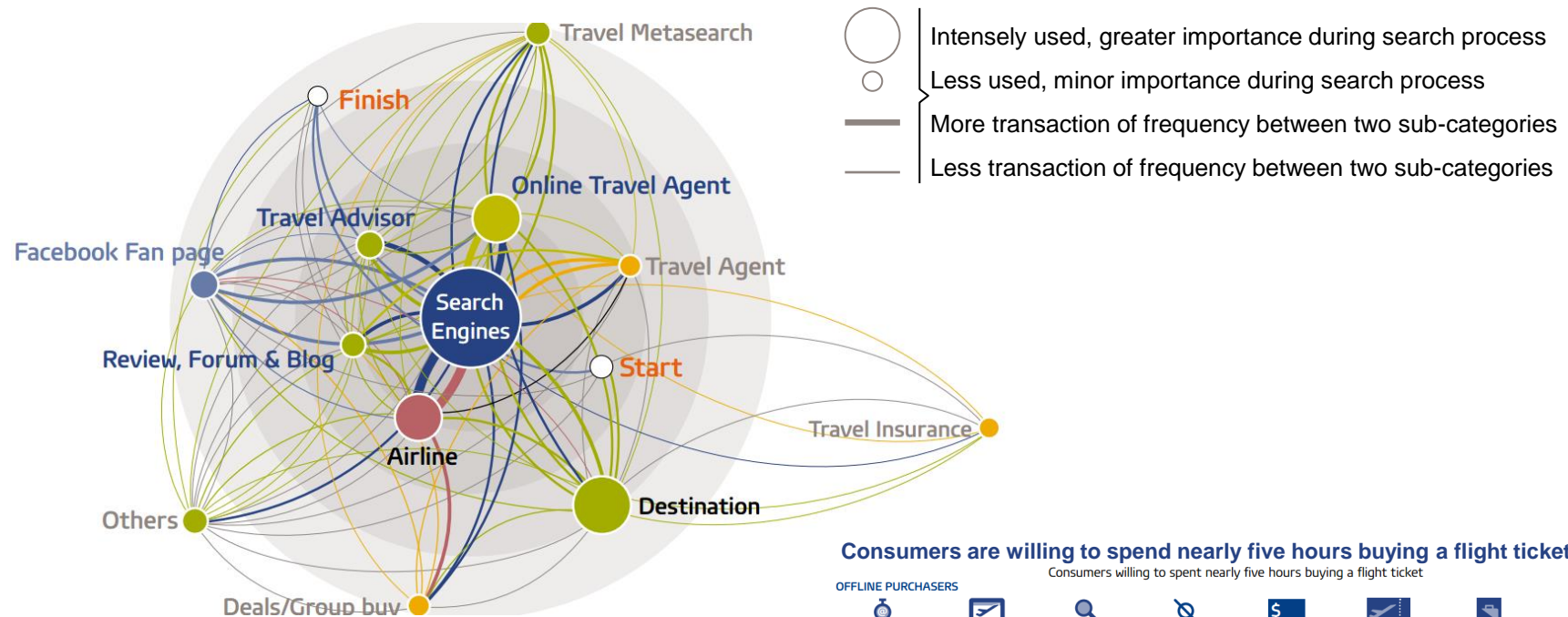
- 13,000 experts in 100 countries
- Ca. 5m consumer and electronics products sales tracked globally for brands and manufacturing companies
- Supplying television audience measurement in 8 media markets, as well as digital and radio tracking in more countries
- Providing insight through social media data, including GfK Twitter TV Ratings in several markets
- Part of Europanel partnership, capturing scan-based purchasing
- Provider of XPs, an innovative metric to capture brand uplift



We are the trusted source of relevant market and consumer information.

# Consumers make their own digital journeys

They spend five hours researching the purchase of an airline ticket



## Consumers are willing to spend nearly five hours buying a flight ticket

Consumers willing to spend nearly five hours buying a flight ticket

### OFFLINE PURCHASERS

206 min	70	96%	10	388	33%	100%	98%
spent on online research	visits to travel website	Search (reach)	travel website was visited on average	USD expense	Ticket only	Econ Class	Short Haul

### ONLINE PURCHASERS

291 min	92	94%	22	436	53%	93%	86%
spent on online research	visits to travel website	Search (reach)	travel website was visited on average	USD expense	Ticket only	Econ Class	Short Haul

For more information, please contact [anthony.tan@gfk.com](mailto:anthony.tan@gfk.com)

Tomorrow's media experience will be similarly driven by consumer interests – not a linear programme sequence



A set of “skinny” packages substitutes the one big cable subscription

**Amazon**



**NOW TV**



**Netflix**



**Dogus  
Turkish  
Drama**



**Facebook**



**YouTube**



# SVOD and AVOD services have been growing rapidly in the UK, to the detriment of traditional media services



Compared to 6 months ago, users of SVOD and Catch-Up services are watching more on these platforms, at the expense of both traditional physical products as well as live, scheduled TV.

On-Demand SVOD services

Free TV Catch-up or On-Demand

On-Demand free as part of Pay TV

Recorded or time-shifted content

Other sources

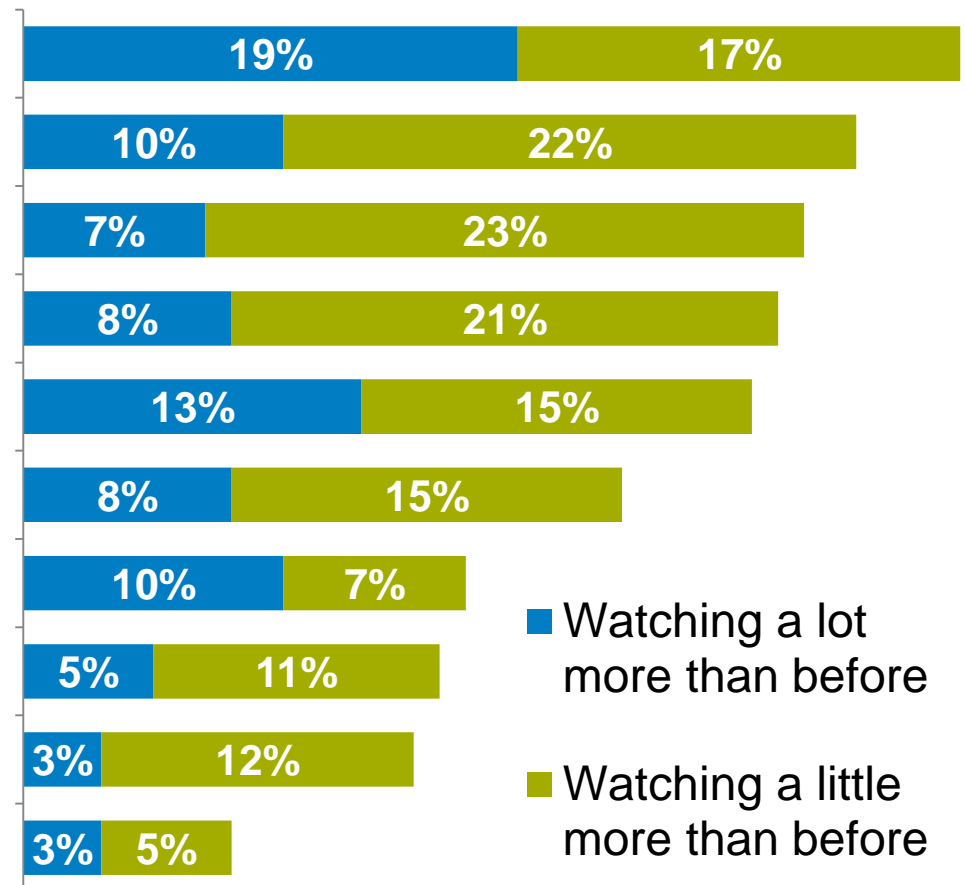
Free online video

Scheduled/Live content

Pay-per-view on demand service

DVD or Blu-ray

Paid-for download to own





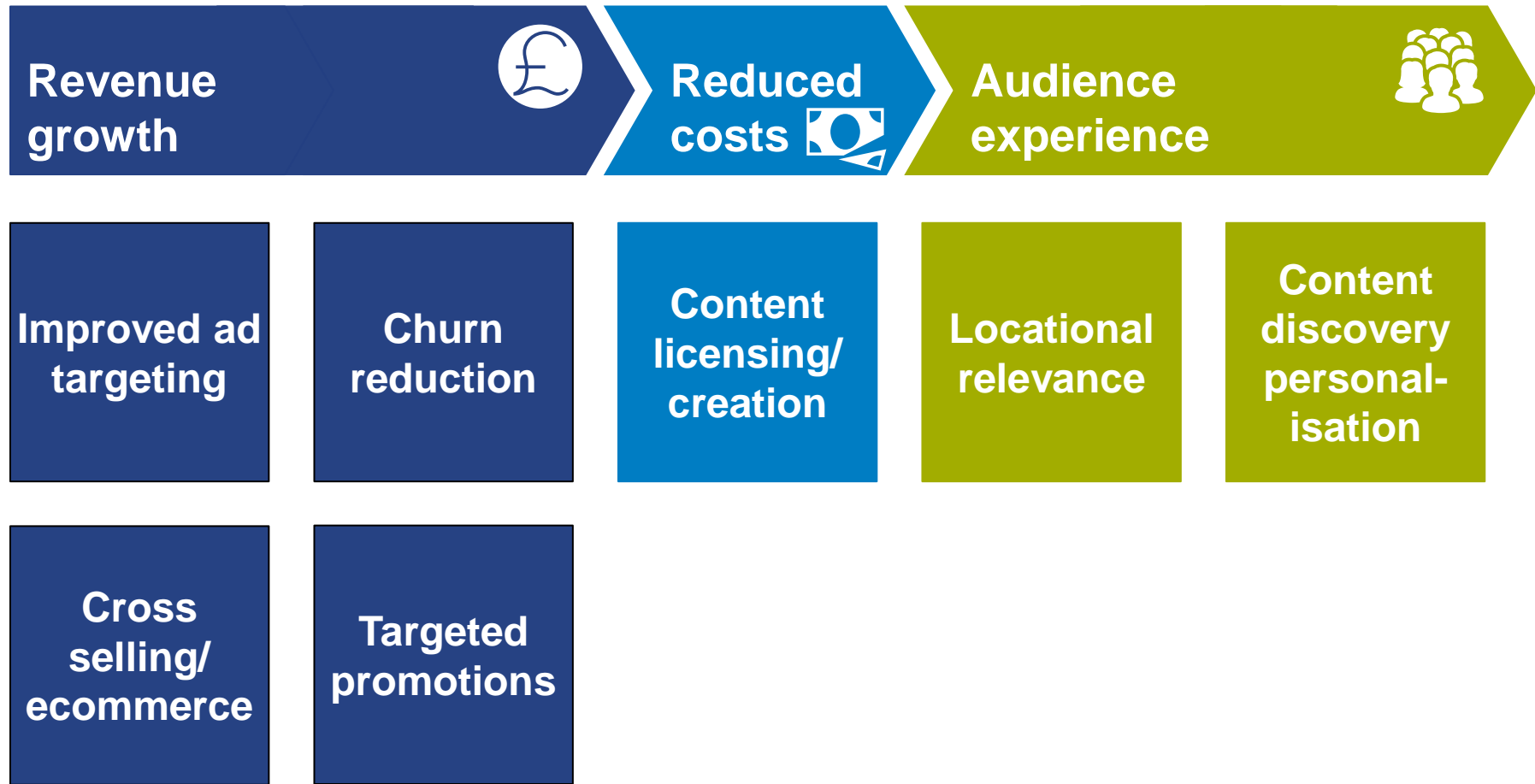
**Many companies have  
data stuck in silos**



# Data is the key to creating value and competing – in all parts of the media value chain



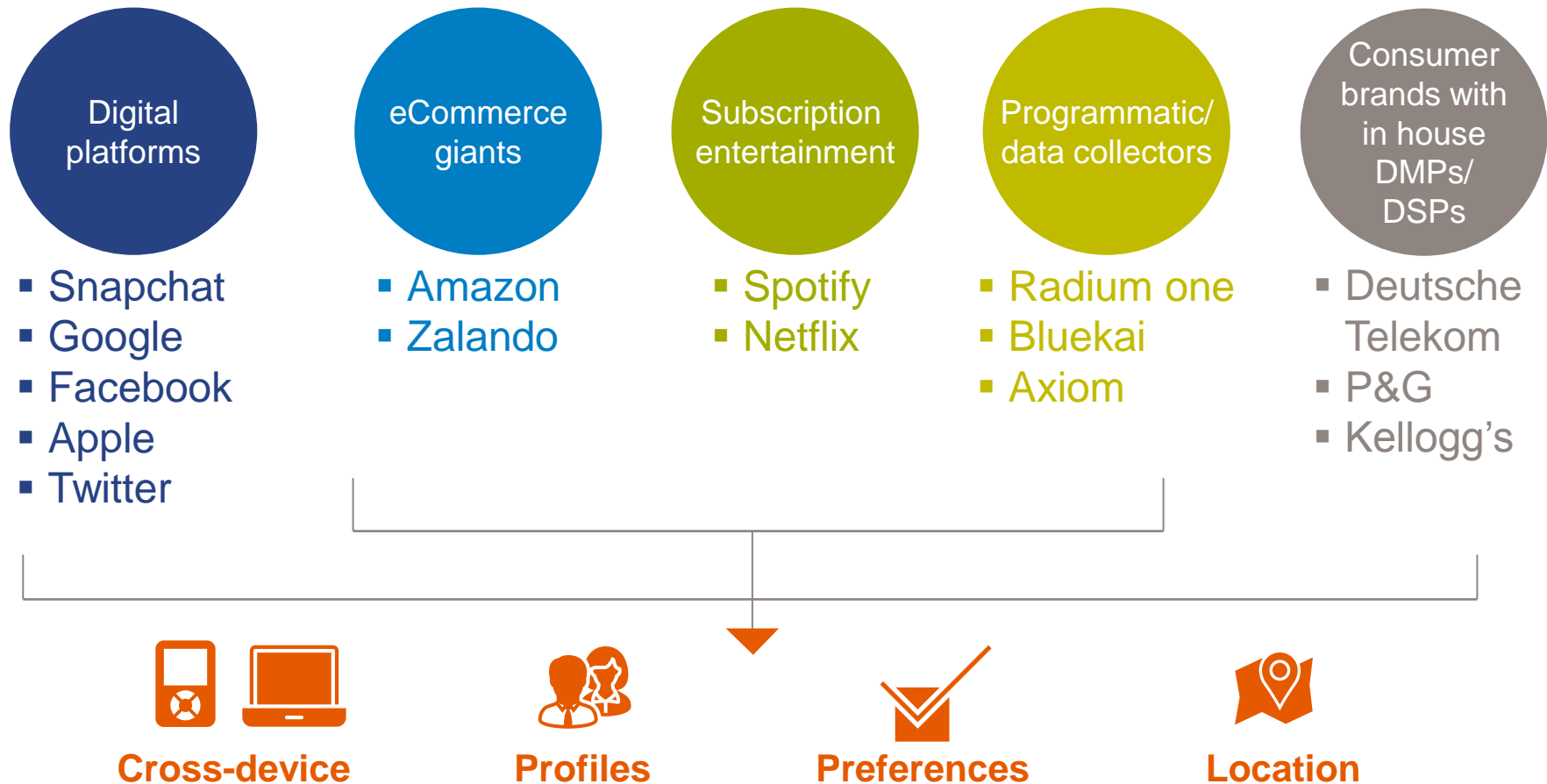
## Advantage from data in media



# However, different types of players are competing for consumer data advantage



## The battle for consumer data





# And the “gloves are off...”

Fighting for the data advantage

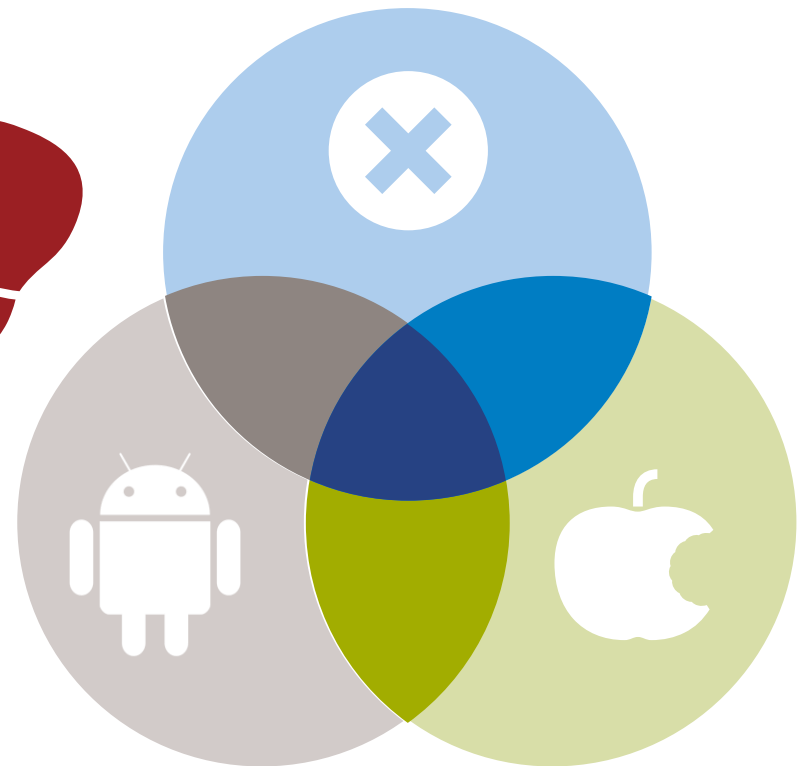
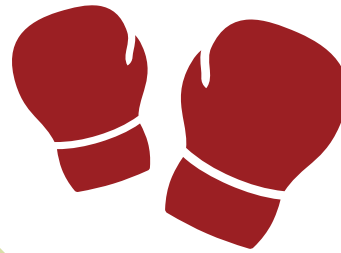
Apple allows ad blockers on iOS

Amazon removes Chromecast and Apple TV from its shop



Facebook publisher ecosystem and ad network

Data collectors tapping into location based data



Google launches Android TV

Apple re-launches Apple TV

# Programmatic is complex, fast moving and not for the light hearted



Source: Lumascape.

# Powerful matching technologies are being combined – requiring significant investments



Matching is becoming smarter than ever before

## Preferences/ recommendations

## Predictive

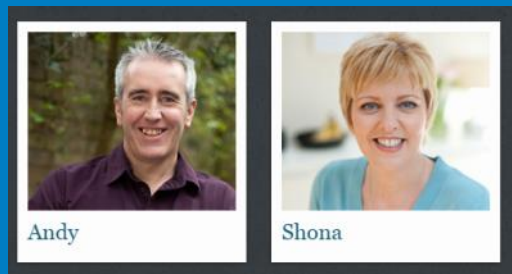


## Data gamification

## Real-time environments



## Location based





# Matching technologies and data are important beyond the media industry



John Battelle argues that what is adtech today will evolve into a far more encompassing platform for personalised processing of transactions

## Walk into a retail store



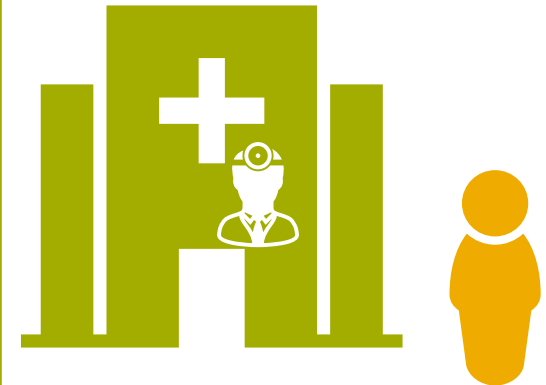
**Today's example:**  
Seven Eleven savings app for stores

## Sit down at a steering wheel



**Today's example:**  
Via Michelin guide to restaurants and hotels

## Enter a doctor's office



**Today's example:**  
MyFitnessPal food logging and exercise tracker

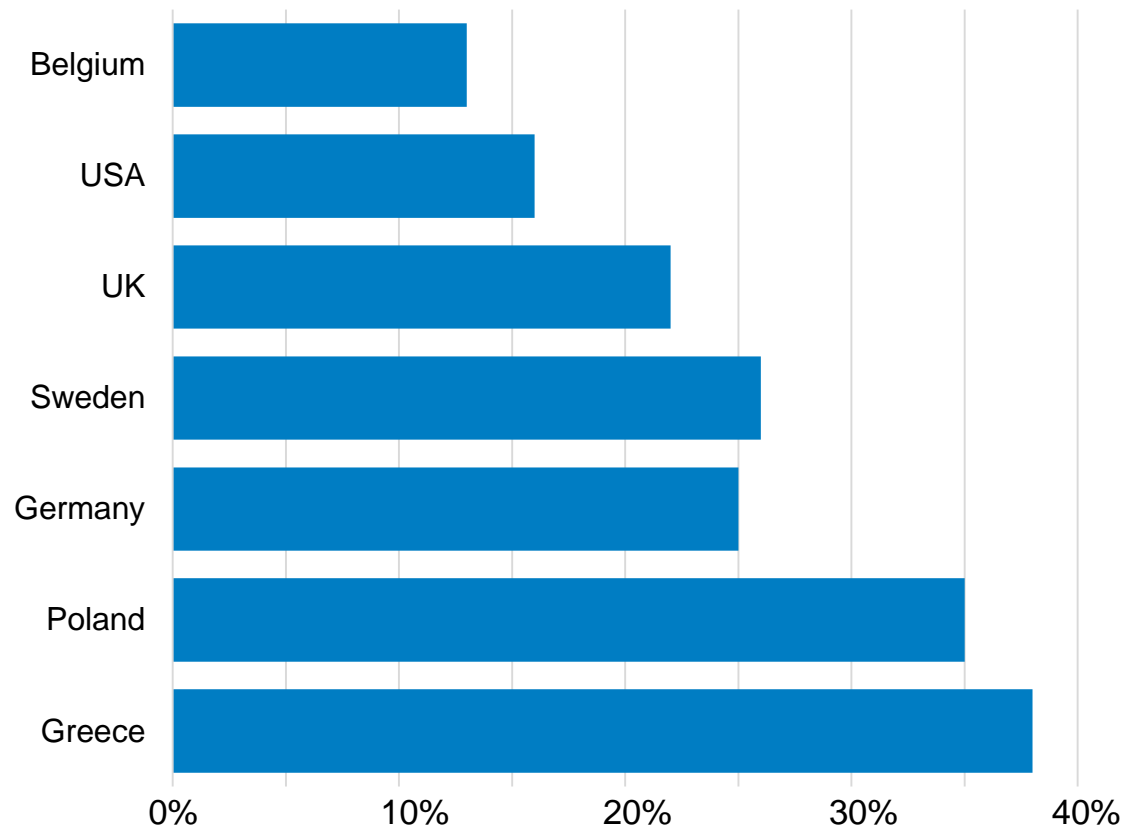
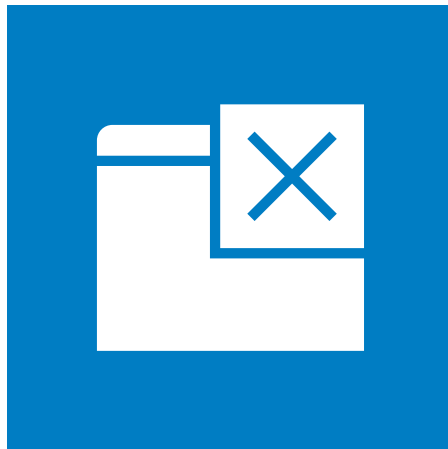
# There is a consumer backlash against the use of personal data



## Ad blockers and the Customer Commons movement



### Use of ad blockers (%)





# There are three possible trajectories that transaction platforms could develop into



## Three trajectories for personalised transaction platforms



# In the end, the consumer will decide where to “turn the dial”



Consumer choice and personal data



THANK YOU

NIKO.WAESCHE@GFK.COM