

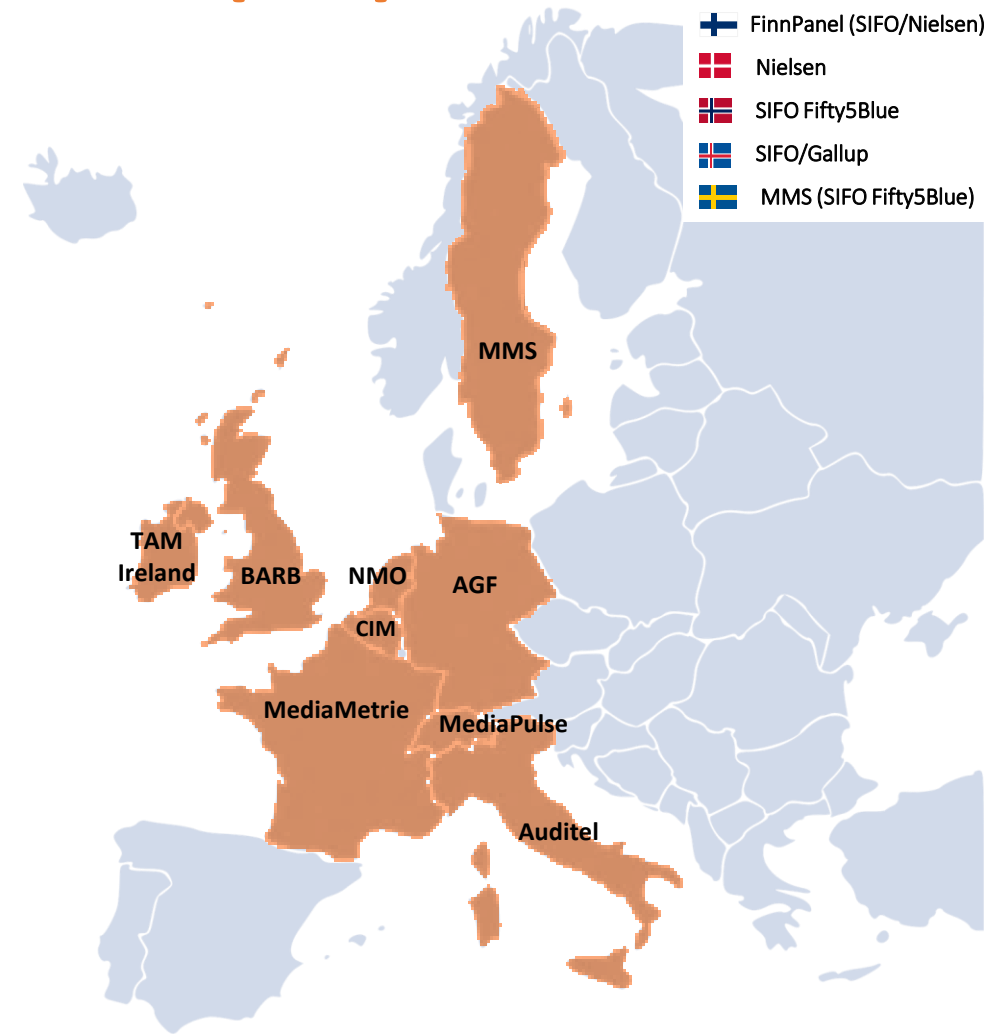


# NEW VIDEO MEASUREMENT 2027

Summary changes in setup, equipment, methodology & output

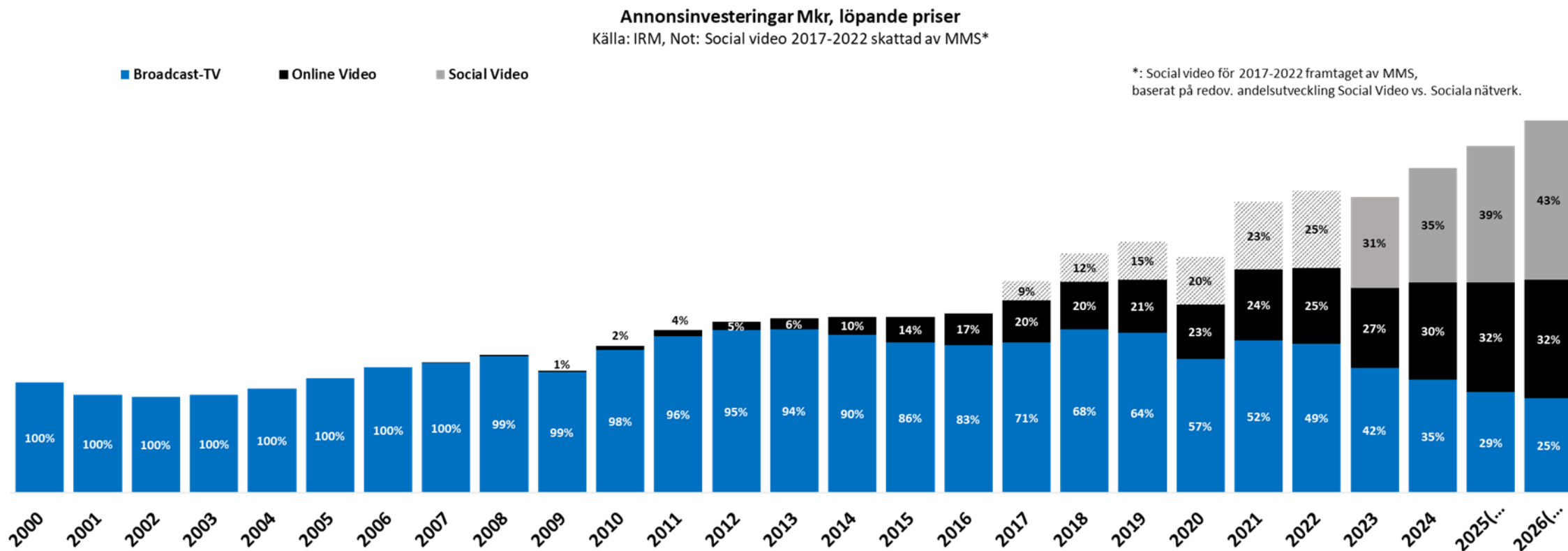
# MMS is a Joint-Industry-Committee (JIC)

- **Owned by the national TV industry** - broadcasters SVT, TV4, Viaplay Group and Warner Bros. Discovery Sweden as well as Swedish Advertising Association and Swedish Media Agency Association.
- **Independent and non-profit** – working to benefit the whole video industry, regardless commercial or non-commercial.
- **Main task is to procure measurement solutions** – this is usually done each 4-5 years. Last measurement setup (Nielsen) started in 2022 and ends in 2025. In 2025 MMS announced that SIFO Fifty5Blue is selected as new supplier for the period 2027-2030.
- Measuring Broadcast-TV since 1994 and Online Video since 2012. MMS combined the two datasets and launched Cross-platform in the end of 2023. In the end of 2025 MMS launched the Video In Home dataset.



# Media consumption and ad market changing

MMS needs to ensure that streaming is increasingly captured in the measurement



# Why change supplier and measurement?

The measurement solution will be...



## More accessible

- Better flexibility w/ data sources other than SDK
- Low thresholds for new players to participate



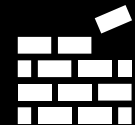
## More comprehensive

- Covering more viewer activities
- Reporting all ad types
- Future-proof by switch from TV to Streaming



## More cost-efficient

- Reasonably priced solution
- Non-essential parts deselected, possible to reactivate
- Maintained high-quality



## More thought-out

- All processes reviewed & updated
- A completely new model is developed & built from ground up



## More straightforward

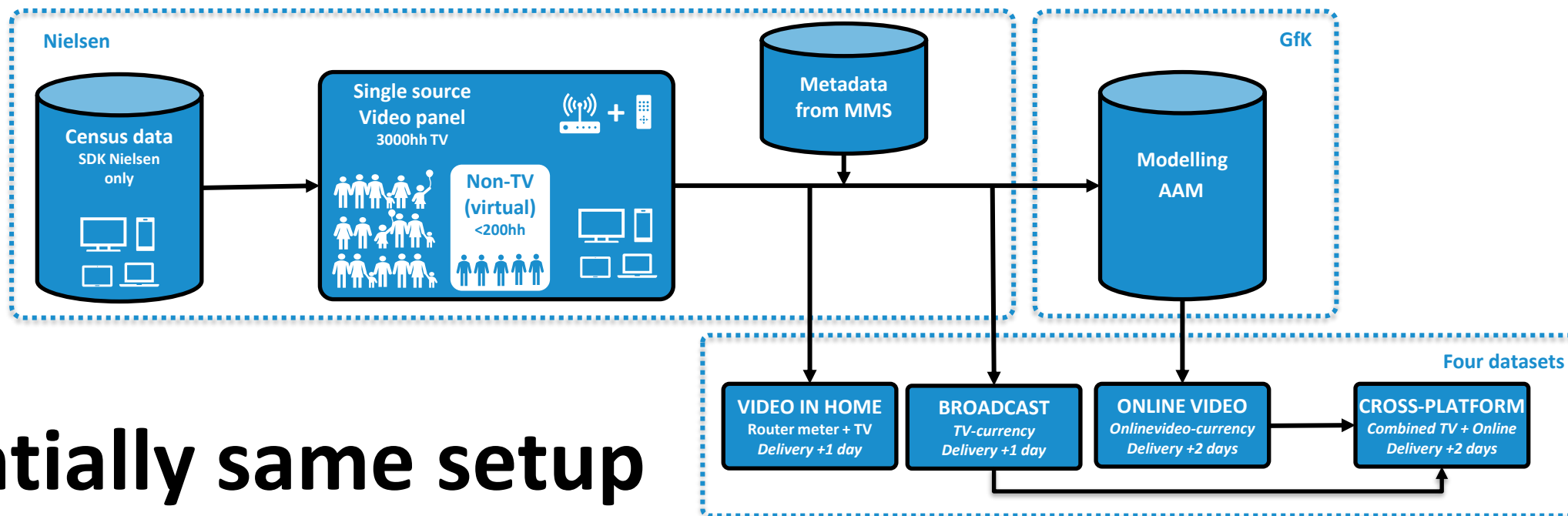
- No measurement overlaps
- Harmonize calculations & definitions
- More easily explained model



# THE VIDEO MEASUREMENTS

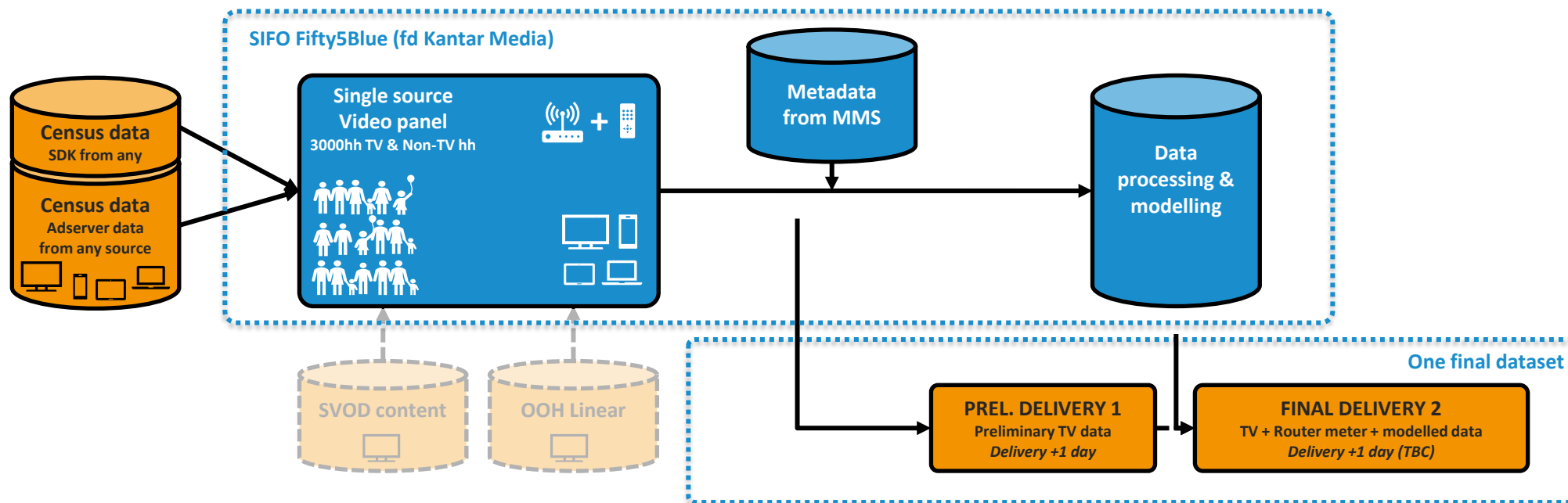
Present and upcoming setups

Today



Essentially same setup

In 2027



# More possible sources of census data

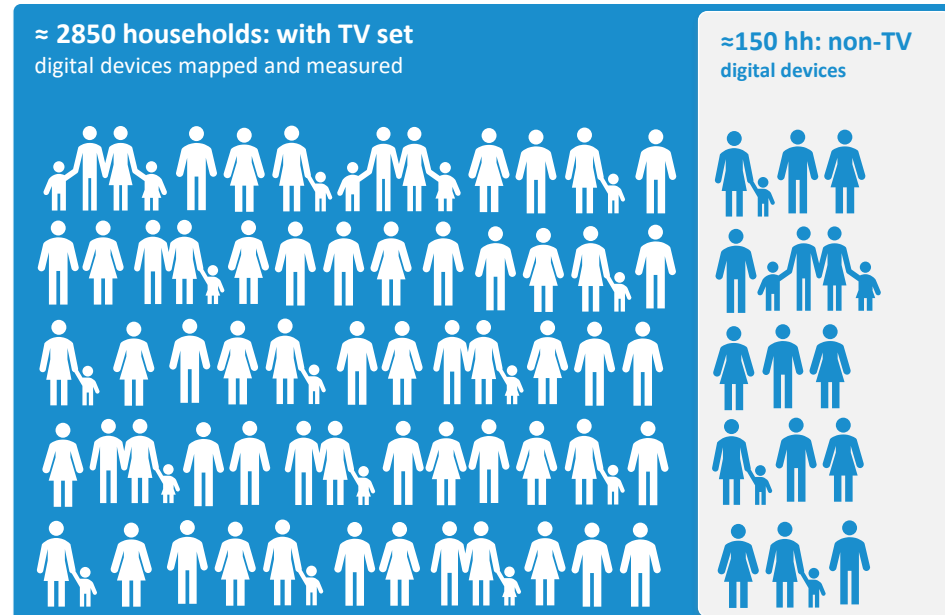
Census data and panel viewing data are combined in a sophisticated model that calibrates viewing behavior and generates audience metrics across various demographic groups.

- In the current setup it's only possible to measure VOD service with Nielsen SDK.
- **The new setup allows for any census data input**, for instance custom-made SDK (SVT), SIFO SDK (UR), or S2S ad server data (TV4, Viaplay and Warner Bros. Discovery).
- **MMS is setting up validation processes** to make sure the different data sets are comparable.

# A completely new Video Panel vs. today

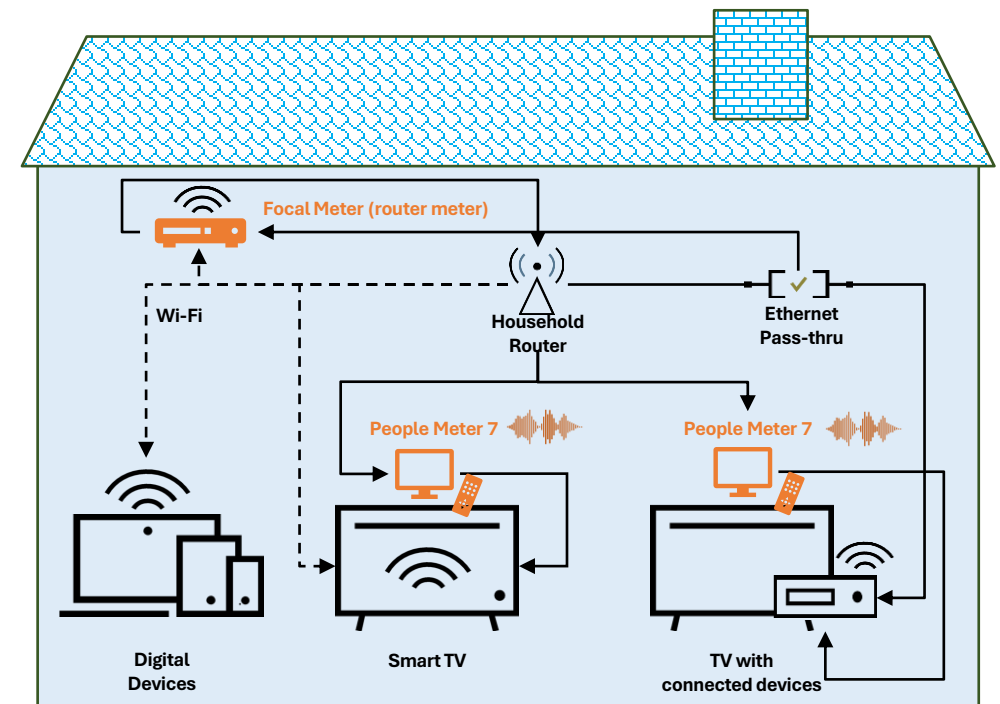
- The Video Panel will continue to consist of 3000 physical households – the virtual households in the current panel representing non-TV households (approx. 4%) are changed to physical households in the coming panel as part of the 3000.
- The new panel is weighted with almost the same variables as the old one – there are only minor changes made.
- **Completely new households are recruited** and no households from the current panel are “reused” for the new one – this may mean slightly different viewing levels vs the old.

## 3000 panel households



# Same type of equipment in panel homes

- All households with a TV set will have a **People Meter 7** connected to each set – metering audio signal detecting TV content consumption, regardless of technical setup.
- All households with internet connection and a router will have one **Focal Meter** connected to it – by monitoring bandwidth it will detect video streaming on agreed video streaming services, on all devices using the router.
- All non-work/school related digital devices are mapped and can be identified both in census and via the router meter traffic.





# REPORTING & DELIVERIES

Output, deadlines

# Changes in reporting

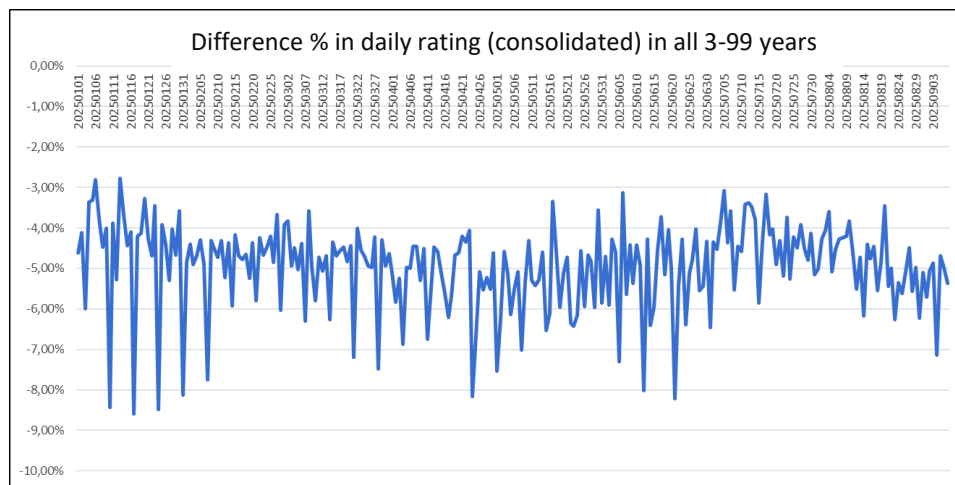
- 1. Output goes from many datasets to one.** From “PUT” to “PUV”: TV-currency is combined with the Online Video measurements (tagged services) and the equivalent of Video In home measurement (non-tagged services).
- 2. Audio matching is mainly used for TV-viewing coming from distributors.** Streaming is mainly measured through census or router data.
- 3. All TV viewing reported on day of viewing, not day of broadcast.** All viewing activity is therefore reported in the same way.
- 4. Whitelist limits number of non-tagged services measured.**
- 5. Intend faster deliveries of data vs. today.**

# Viewing ascribed to streaming

## What happens with the TV-currency?

Audio matching is given less priority (vs. current setup) and is treated as just one of several metering sources. Audio matching will still mostly have priority in live viewing activities.

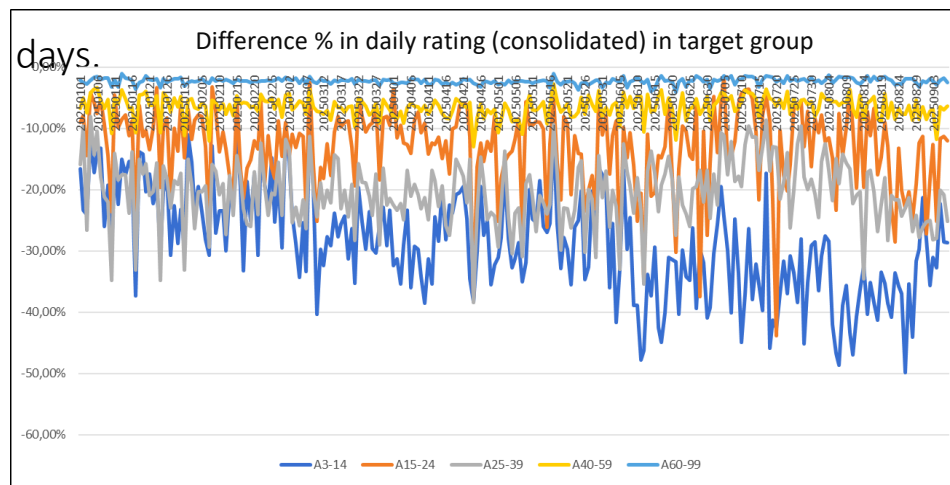
But when viewing on TV screens is streamed on-demand after broadcast, this viewing is only measured through census or the router.



## What will the effect be?

An average day 4,9% (2,8 – 8,6%) of the total TV viewing will be reported as VOD instead. The difference is largest among kids and young teens 3-14 years and the lowest among 60+ years.

There is a large variation between media companies with SVT decreasing the most (6,8%) and WBD and Viaplay Group the least (approx. 3%).

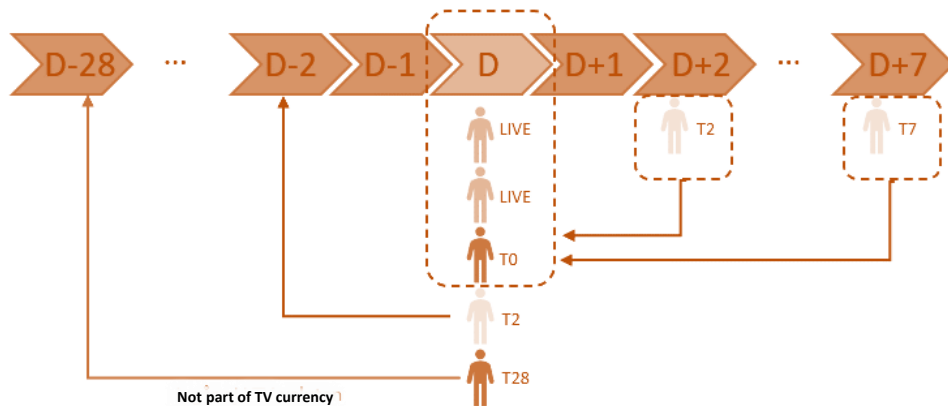


# Unify reporting: on day of viewing

## How does it work in the TV-currency today?

Time-shifted viewing (TSV) that takes place within 7 days is rescheduled to the broadcast time.

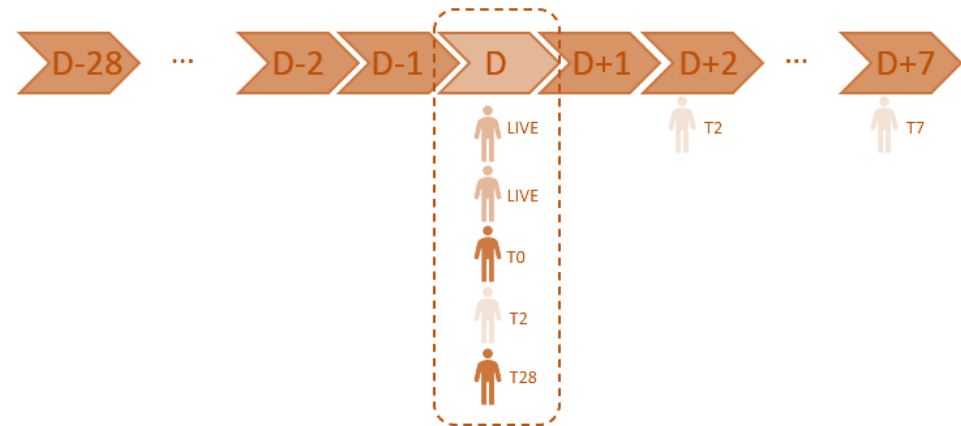
The TV currency provides a measure of those who watched something that was previously broadcast that day, not that it happened on the current day.



## How will it work in the measurement from 2027?

All viewing is ascribed to the day the viewing took place, as in the Online currency.

In the new TV calculation, 28 days of TV are included. The results include all daily viewing of content broadcasted over the next 28 days.



Depiction: Panelists within dotted areas are included in the TV-metric

# Router metering of non-tagged via whitelist

## How does it work with streaming services today?

All services whose consumption is captured by the router meter will be reported in the dataset Video In Home.

The router meter has (until today) picked up around 470 different services – most of them reports almost no viewing over time and there are large unknown.

## How will it work in the measurement from 2027?

Only services pre-defined on a whitelist (for panellist approval) is measured. Services that are tagged are also measured.

The whitelist consists of approx. 40 services. The viewing time for these services retained in the upcoming measurement constitutes approximately 95.5% of the total streamed time in today's VIH measurement, excluding unclassified/unknown domains.



## Measured streaming services (through router meter) from 2027

|                    |                     |
|--------------------|---------------------|
| Aftonbladet        | Rakuten TV          |
| Allente            | Sappa               |
| Amazon Prime Video | SF Anytime          |
| Apple TV+          | SkyShowtime         |
| ATG Play           | Snapchat            |
| Blockbuster        | Sport Video Network |
| BritBox            | SVD                 |
| Dagens Industri    | SVT Barn            |
| Discovery+         | SVT Nyheter         |
| Disney+            | SVT Play            |
| Expressen          | SVT Sport           |
| Facebook           | Tele2 Play          |
| Fotbollskanalen.se | Telenor Stream      |
| Godare             | Telia Play          |
| HBOmax             | TikTok              |
| Instagram          | TV4 Play            |
| Köket              | UR Play             |
| Netflix            | Viaplay             |
| PLEX               | X                   |
| Pluto.tv           | YouTube             |

# What's included in the measurements Jan 1st 2027

| Media Company<br>Data level<br>(measurement) | VOD<br>Pgm/Ad/Services data<br>(census) | VOD<br>Services only<br>(router) | TV channels<br>Pgm/ad/Channels data<br>(audio match) | TV channels<br>Channels only<br>(audio match) |
|----------------------------------------------|-----------------------------------------|----------------------------------|------------------------------------------------------|-----------------------------------------------|
| <b>A+E</b><br><small>NETWORKS™</small>       |                                         |                                  | ✓                                                    |                                               |
| <b>allente</b>                               | ✓ *                                     | ✓                                |                                                      |                                               |
| <b>amazon</b>                                |                                         | ✓                                |                                                      |                                               |
| <b>Apple</b>                                 |                                         | ✓                                |                                                      |                                               |
| <b>ATG</b>                                   |                                         | ✓                                |                                                      | ✓                                             |
| <b>BBC</b>                                   |                                         | ✓                                | ✓                                                    |                                               |
| <b>BONNIER<br/>NEWS</b>                      |                                         | ✓                                |                                                      |                                               |
| <b>ByteDance</b>                             |                                         | ✓                                |                                                      |                                               |
| <b>Google</b>                                |                                         | ✓                                |                                                      |                                               |
| <b>Meta</b>                                  |                                         | ✓                                |                                                      |                                               |
| <b>Microsoft</b>                             |                                         | <del>LinkedIn</del>              |                                                      |                                               |
| <b>NETFLIX</b>                               |                                         | ✓                                |                                                      |                                               |
| <b>Paramount</b>                             |                                         | ✓                                |                                                      | ✓                                             |
| <b>plex</b>                                  |                                         | ✓                                |                                                      |                                               |



Services that is measured with census data will also cover OOH,  
other services measured with router meters cover in home.

| Media Company<br>Data level<br>(measurement) | VOD<br>Pgm/Ad/Services data<br>(census) | VOD<br>Services only<br>(router) | TV channels<br>Pgm/ad/Channels data<br>(audio match) | TV channels<br>Channels only<br>(audio match) |
|----------------------------------------------|-----------------------------------------|----------------------------------|------------------------------------------------------|-----------------------------------------------|
| <b>Rakuten</b>                               |                                         | ✓                                |                                                      |                                               |
| <b>SCHIBSTED<br/>MEDIA GROUP</b>             |                                         | ✓                                |                                                      |                                               |
| <b>skySHOWTIME</b>                           |                                         | ✓                                |                                                      |                                               |
| <b>Snap Inc.</b>                             |                                         | ✓                                |                                                      |                                               |
| <b>svt</b>                                   | ✓                                       |                                  | ✓                                                    |                                               |
| <b>TELE2</b>                                 | ✓ *                                     | ✓                                |                                                      |                                               |
| <b>telenor</b>                               | ✓ *                                     | ✓                                |                                                      |                                               |
| <b>Telia</b>                                 | ✓ *                                     | ✓                                |                                                      |                                               |
| <b>The<br/>WALT DISNEY<br/>Company</b>       |                                         | ✓                                | ✓                                                    |                                               |
| <b>4</b>                                     | ✓                                       |                                  | ✓                                                    |                                               |
| <b>UR</b>                                    | ✓                                       |                                  |                                                      |                                               |
| <b>viaplay GROUP</b>                         | ✓                                       |                                  | ✓                                                    |                                               |
| <b>WARNER BROS.<br/>DISCOVERY</b>            | ✓                                       |                                  | ✓                                                    |                                               |
| <b>X</b>                                     |                                         | ✓                                |                                                      |                                               |

Pgm/Ad/Services data = programs, ads and service/channel/time level data

Services only or Channels only = service/channel/time level data

\* = Only DAI for participating stakeholders

# NEXT STEPS

What's been done, what's the next steps?

# Next steps

|          | June                                                                                                              | August                                                        | October                                                                                                                                                 | November                                                                                                         |
|----------|-------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| Activity | Share file specs with system owners/clients for non-tagged linear viewing data (test files and calculation rules) | Share first analysis with Technical Board (non-tagged linear) | Parallel run for non-tagged linear viewing<br><br>Share file specs with system owners/clients for final viewing data (test files and calculation rules) | Share calibrated results (delivery 2) with Technical Board and preview tools<br><br>Parallel run for all viewing |

**Questions or  
Comments?**  
Please let us know!

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