

TV through the eyes of an observer

A question of definition

A measure of quality

A culture of transparency

An obligation of responsibility

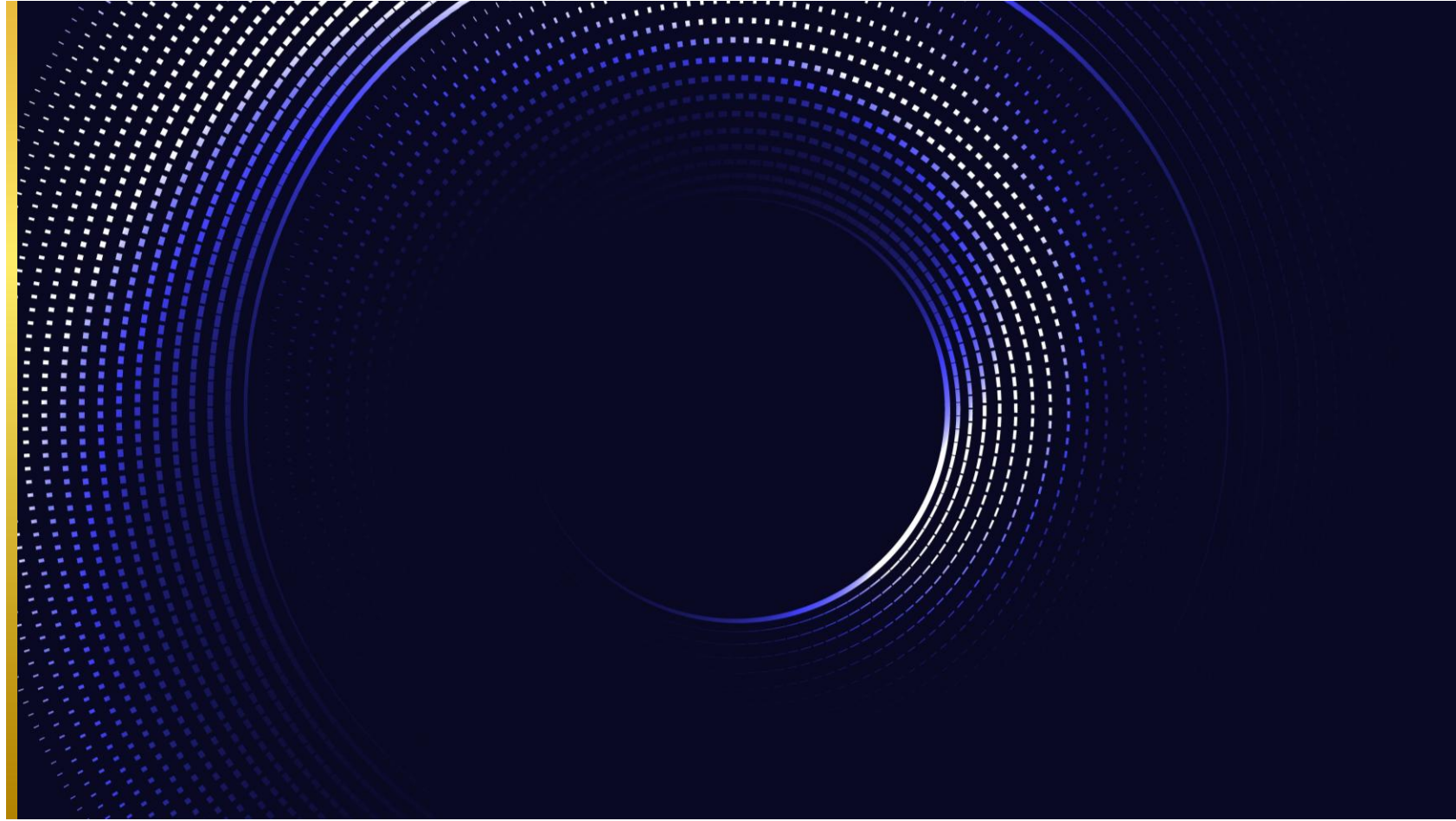
A local experience

An evolving ecosystem

Stuart Wilkinson, MD Business Development

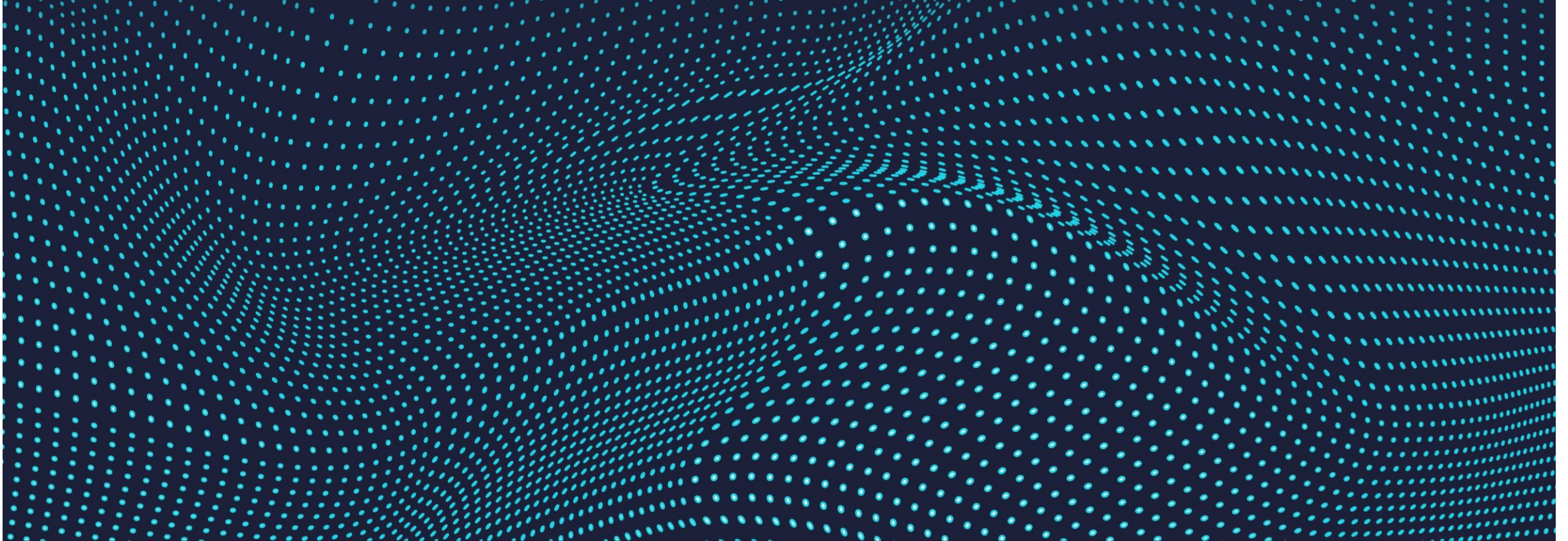
Istanbul

17 September 2025



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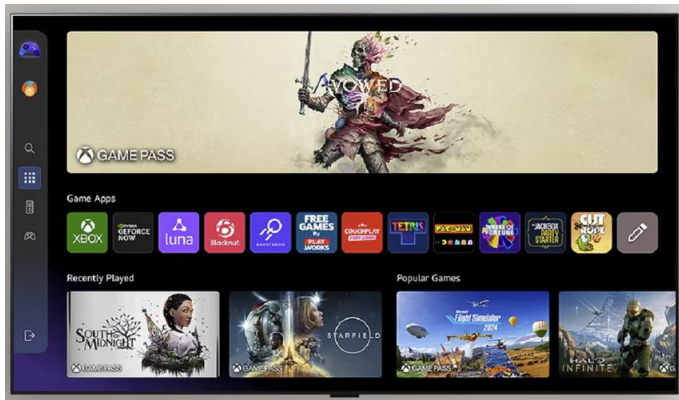
A question of definition



What is TV?

A screen

that does more today than ever before



A place

to enjoy content on your own, or with family and friends



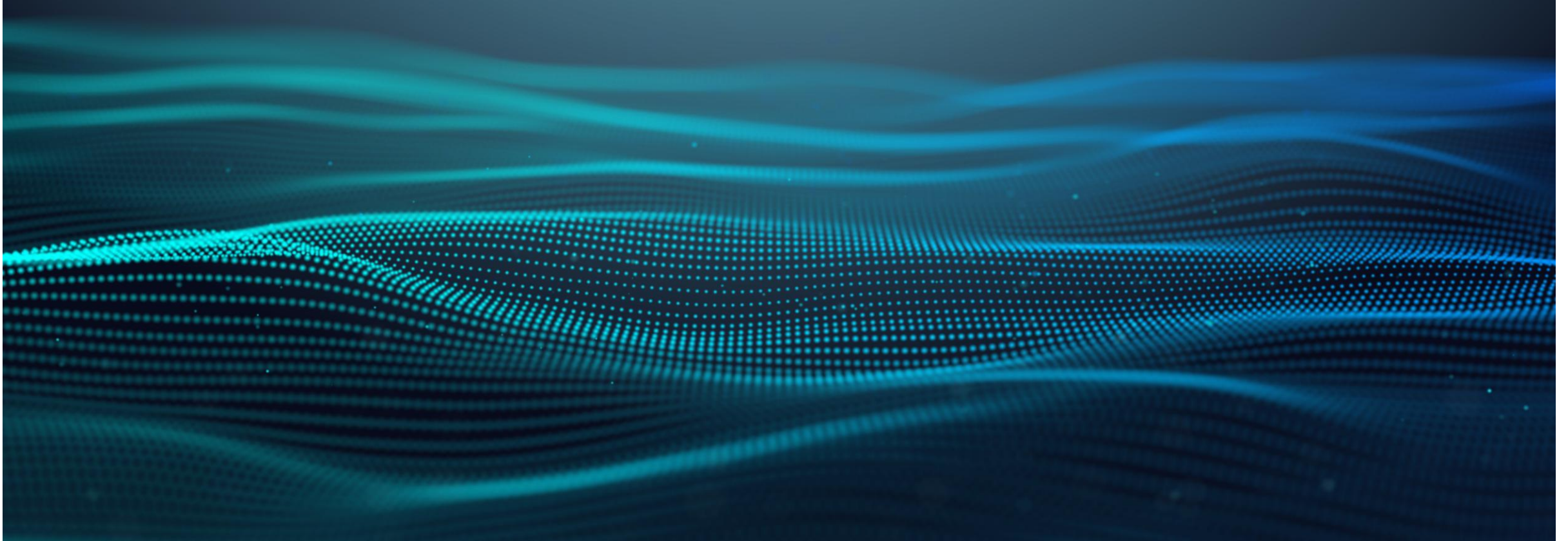
A media ecology

that lets content businesses thrive, and advertisers deliver increasingly data-driven interactive messages



2

A measure of quality



Some things you might be curious to know about independently measuring TV

What a panel is and how it is managed

2 Test Değerleri	YAYIN ALMA ŞEKLİ		HANE HALKI BÜYÜKLÜĞÜ		SOSYO-EKONOMİK STATÜ KATEGORİLERİ				EVDEKİ TELEVİZYON SAYISI		ÇALIŞMA DURUMU	CİNSİYET			
PANEL	KARAAKL/ DIGITAL	KABLO	2-4 KÜŞLÜ HANE	3-4 KÜŞLÜ HANE	5+ KÜŞLÜ HANE	A8 SES	C1 SES	C2 SES	D6 SES	1 TV'Lİ HANELER	2+ TV'Lİ HANELER	ÇALIŞAN	ÇALIŞMAYAN	KADIN	ERKEK
ANKARA	-1.28	1.28	-2.87	1.58	1.40	-0.50	0.40	1.47	-1.87	3.08	-3.08	0.30	-0.30	-0.03	0.03
İSTANBUL	-2.79	2.79	-2.94	2.09	0.77	1.33	0.40	-0.38	-1.40	1.47	-1.47	0.54	-0.54	-0.07	0.07
İZMİR	-2.24	2.24	-0.94	1.15	1.15	-1.15	1.15	2.49	-2.49	0.73	-0.73	-0.14	0.14		
İÇİRE BÖLGESİ (İZMİR HANCI)	-1.73	1.73	-2.91						-0.84	1.40	-1.40	-1.31	1.31		
KARADENİZ BÖLGESİ	-3.02	3.02	-3.25						-1.50	1.25	-1.25	-0.50	0.50		
İÇ ANADOLU BÖLGESİ (ANKARA HANCI)	-2.45	2.45	-2.00	0.54					-1.83	2.39	-2.39	0.04	-0.04	0.02	-0.02
GÜNEY VE DOĞU ANADOLU BÖLGESİ	-2.35	2.35	-2.81	-0.05	2.30	-1.07	0.32	0.95	-0.38	3.24	-3.24	-1.25	1.25	1.00	-1.00
MARMARA BÖLGESİ (İSTANBUL HANCI)	-1.79	1.79	-2.39	2.28	0.03	0.93	1.24	0.67	-2.54	0.57	-0.57	1.04	-1.04	-0.34	0.34
AKDENİZ BÖLGESİ	-3.02	3.02	-2.88	3.15	-0.51	0.54	0.54	1.77	-2.42	2.00	-2.00	0.84	-0.84	-0.84	0.84

Representative

Consented

Compliant

How a People Meter works



People-based: who is watching including family members and guests

Connected to EVERY TV in the home, connected and non-connected.

Detects what is really playing on the screen

How a Focal Meter works



Measures streaming over IP on EVERY panelist device in the home

Helps identify source of viewing between linear and streaming

Helps identify non-BVOD TV usage like SVOD, AVOD or Gaming

Some quirks that might surprise you about independently measuring TV

We may see viewing data from a connected set top box, but the TV has been turned OFF.



We may see streaming data from an HDMI dongle, but the viewer has switched the source to a linear channel



We may see very long viewing sessions in the home without channel changes and find the TV is just left on for the dog!



...the TV we are observing today is tackling increasingly complex challenges

Measuring TV has evolved beyond panel data extrapolations, towards a more complex hybrid system that models big data with panels.

Challenges include:

Legal and technical data sharing protocols between media services, platforms and measurement bodies that must guard against statistical misrepresentation

Probabilistic identity resolution: assumptions must ensure demographic accuracy and inclusivity

Data fusion techniques: combining datasets from different sources, methodology must maintain measurement integrity

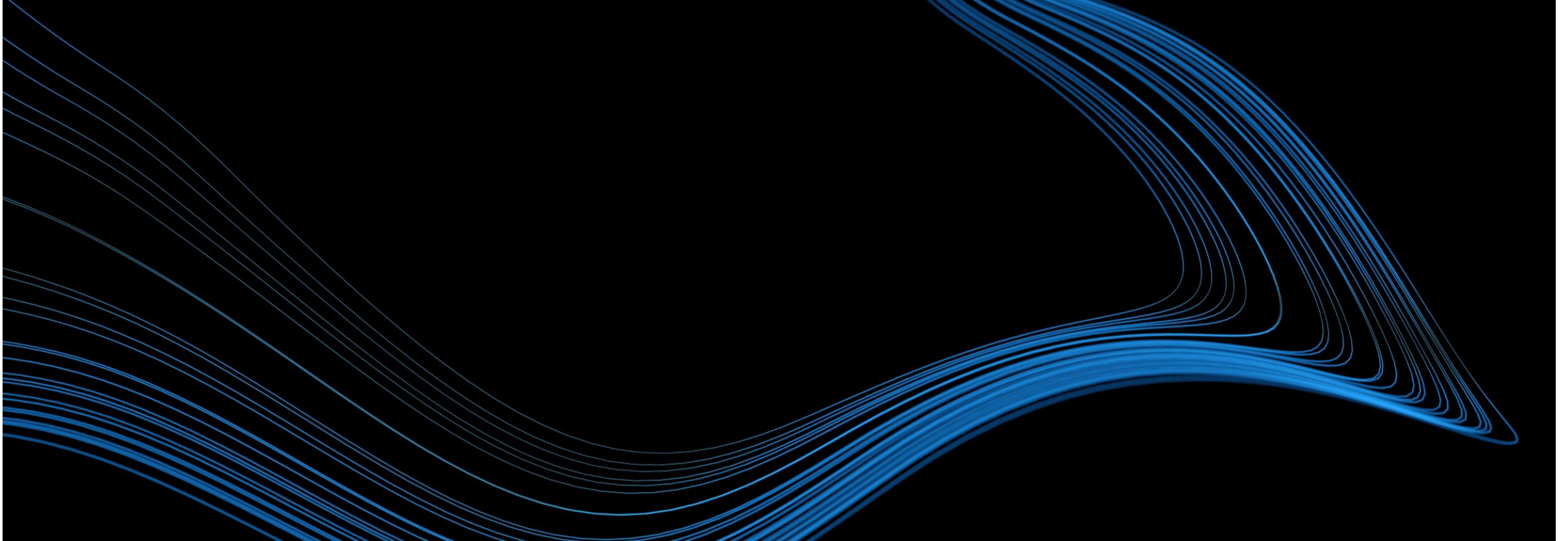
Machine learning algorithms: training data selection and weighting methods must avoid systematic bias

Cloud-based data management systems: access controls must protect data but also not restrict access for key research personnel

and more...

3

A culture of transparency



Transparency is a Foundational Principle of Independent Audience Measurement



- Industry-agreed standards
- Methodological clarity
- Comprehensive documentation
- Balance of proprietary information and disclosure
- Responsibility for accurate representation
- Verification through audits

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An obligation of responsibility

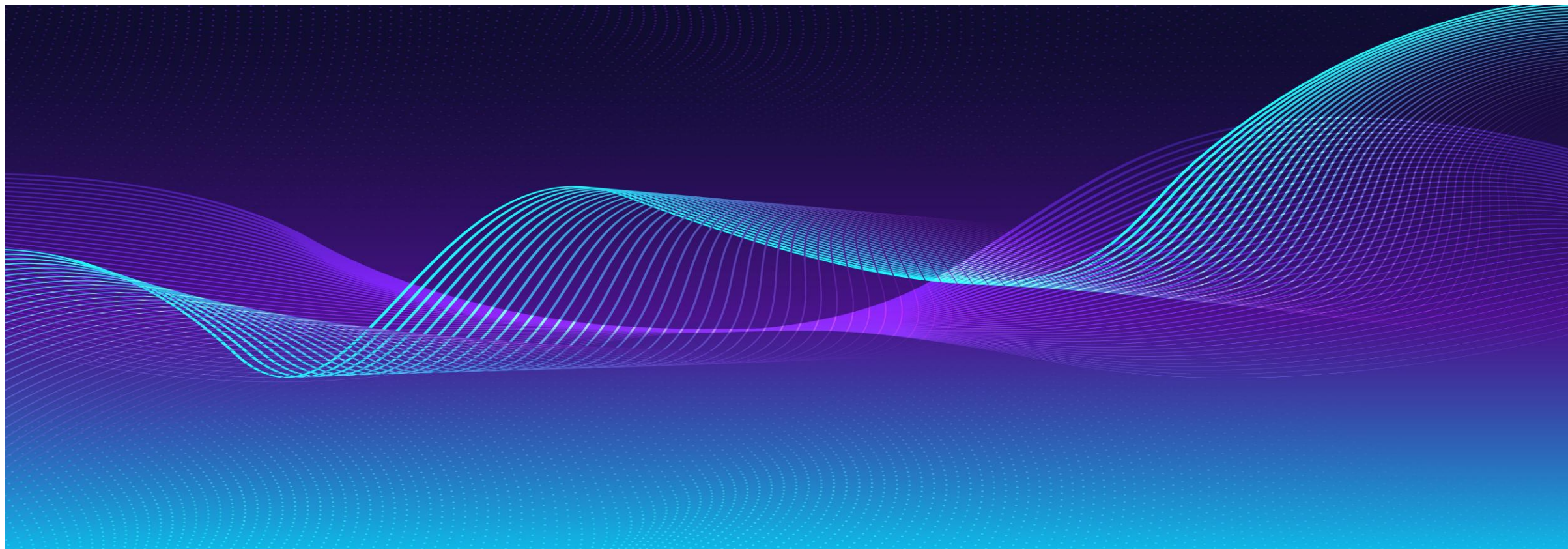


... the TV we are observing today is a highly regulated and “safe” environment.
 The accurate measurement of TV has a Public Interest need as well as commercial.

Limits Ad Exposure time ratio	Protects vulnerable populations	Shows locally produced children’s programming	Prioritizes European and Independent Content	Is inclusive	Is culturally appropriate
20% per hour cap on ads	Alcohol, Tabacco, Gambling ads highly regulated High fat and sugar products not advertised to kids	20% cartoons in Turkish and Turkish culture and 40% other content in Turkish and Turkish culture High standards for children’s development and well-being and include parental control online	50% of broadcast time (non-news, sport, contests, ads and teleshopping) must be of European origin. Indy Producers enjoy a 10% quota supporting SME production and pluralism of perspectives	TVs have quota and must invest in disabled-friendly content though subtitles, sign-language or audio descriptions, including main daily news broadcast	Content should reflect national values and advertising in religious programming is forbidden.

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A local experience



Türkiye, like all markets, is locally unique

...yet globally “similar”

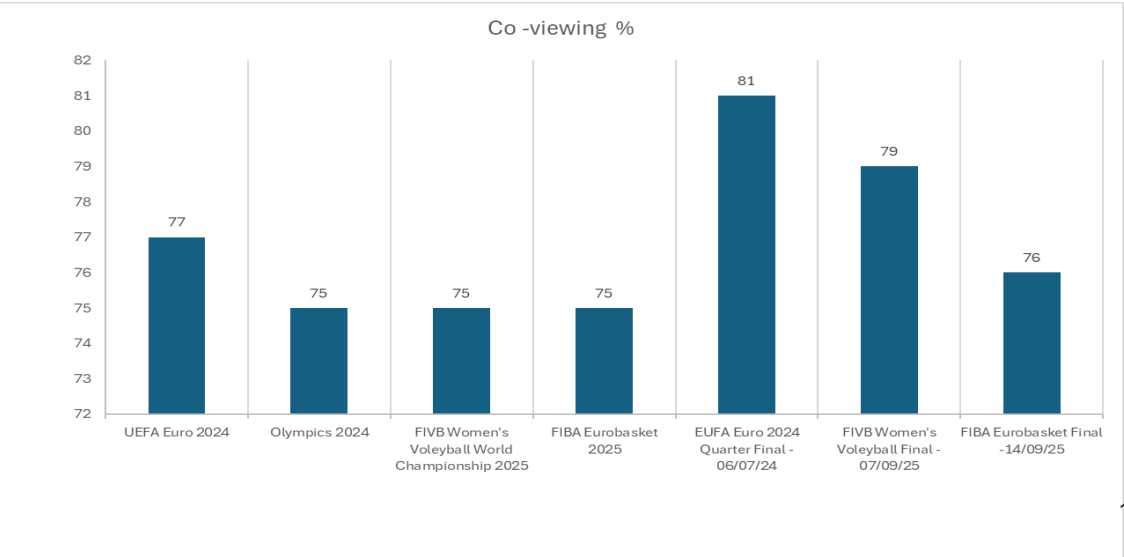
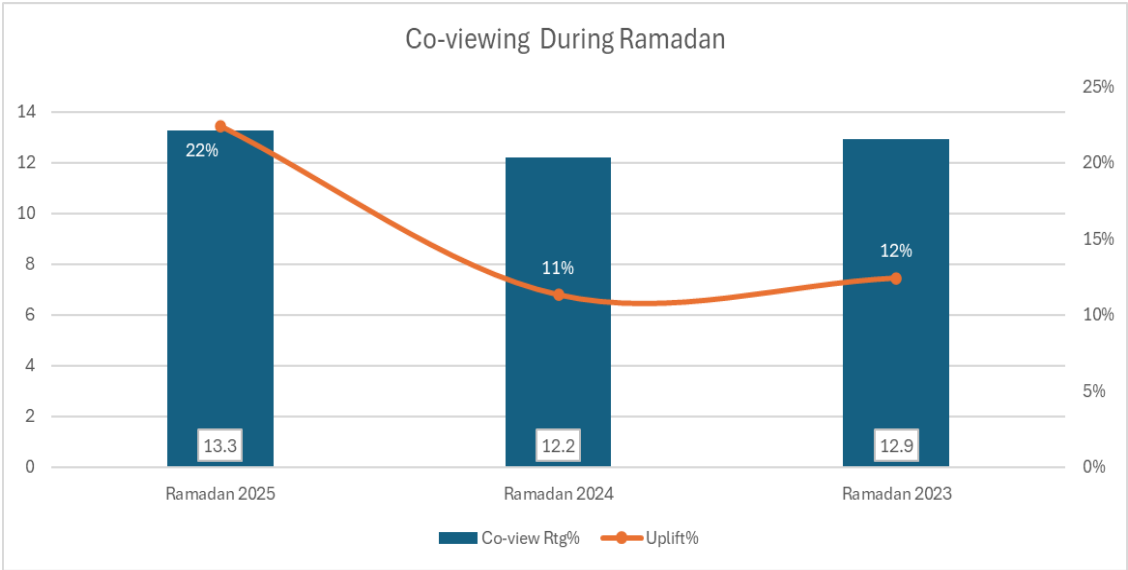
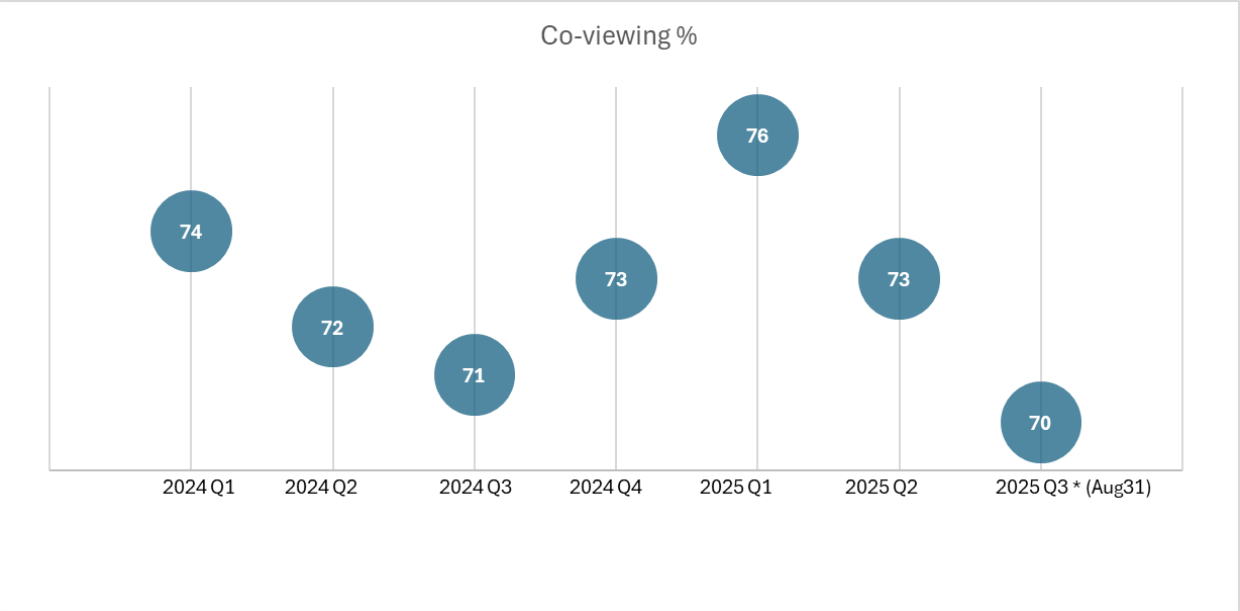
Co-viewing here is high!

73% average co-viewing

Compare with to 28% in Brazil, 29% in Estonia, 56% in Vietnam

Co-viewing increases with seasonality, with additional 22% uplift during Ramadan

Co-viewing is higher in select live sports games



Türkiye, like all markets, is locally unique

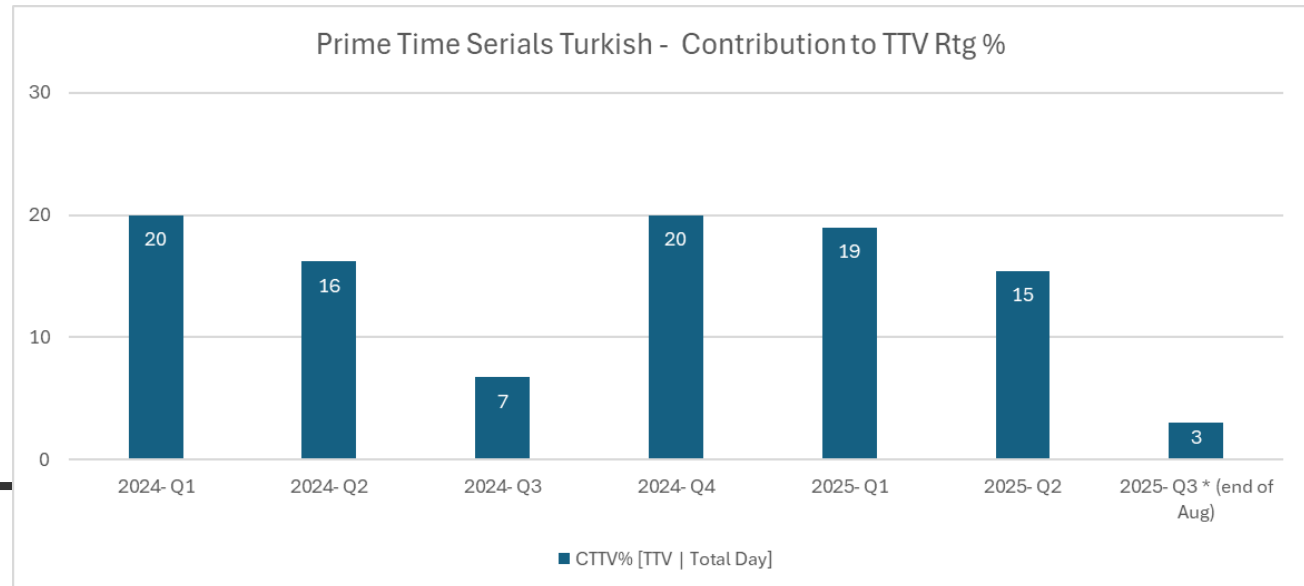
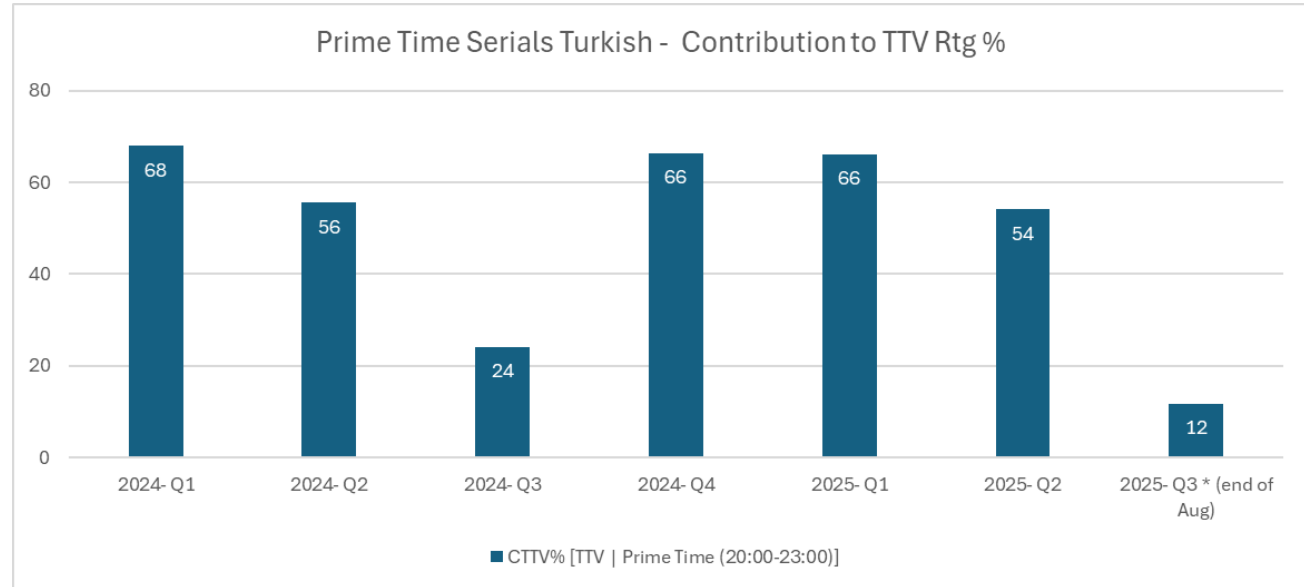
...yet globally “similar”

Story telling champions of the world!

Global leaders in “telenovela” means you are real story tellers in Turkey

A global Production powerhouse

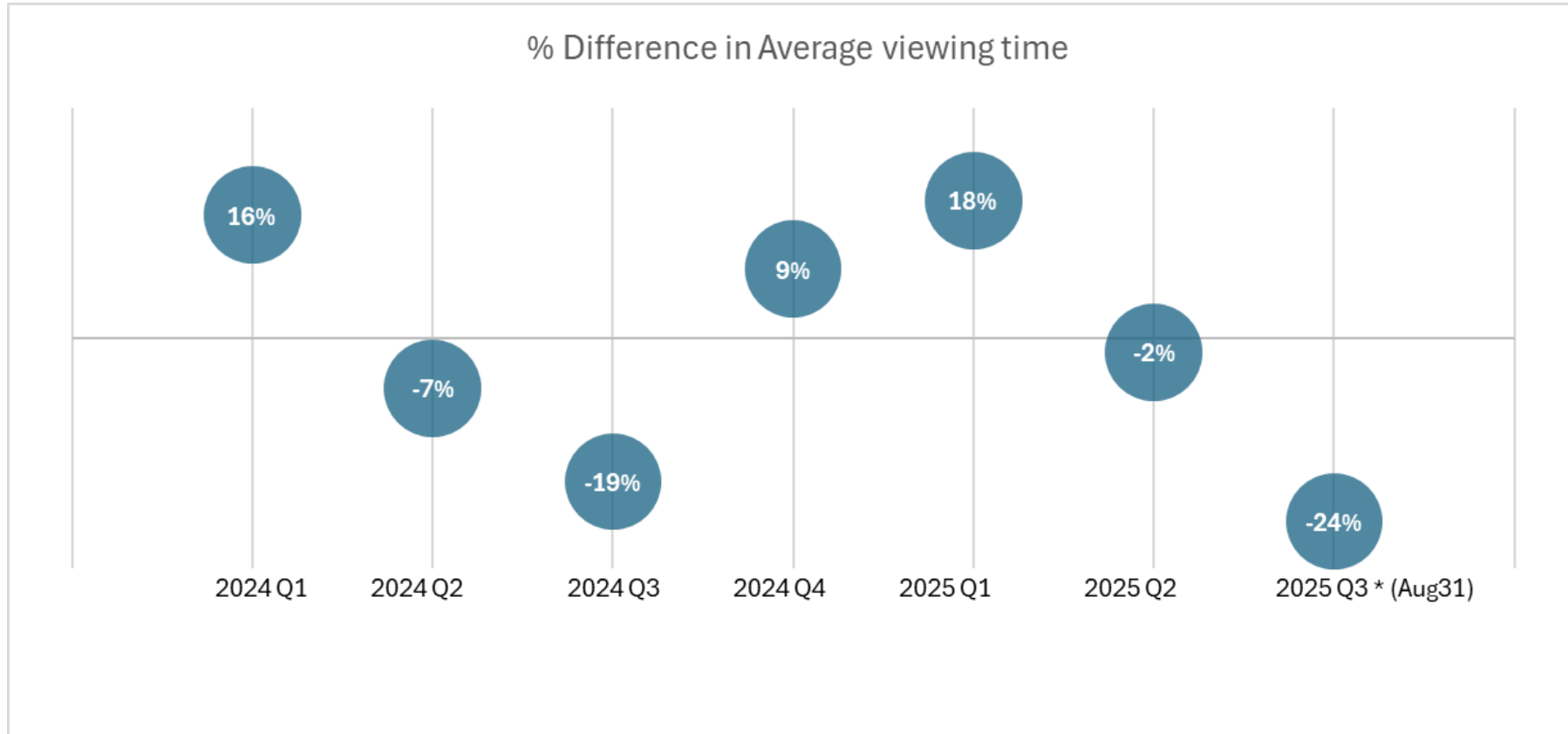
Contribution to total TV viewing by prime-time Turkish series is above 50% during the broadcasting season.



Türkiye, like all markets, is locally unique

...yet globally “similar”

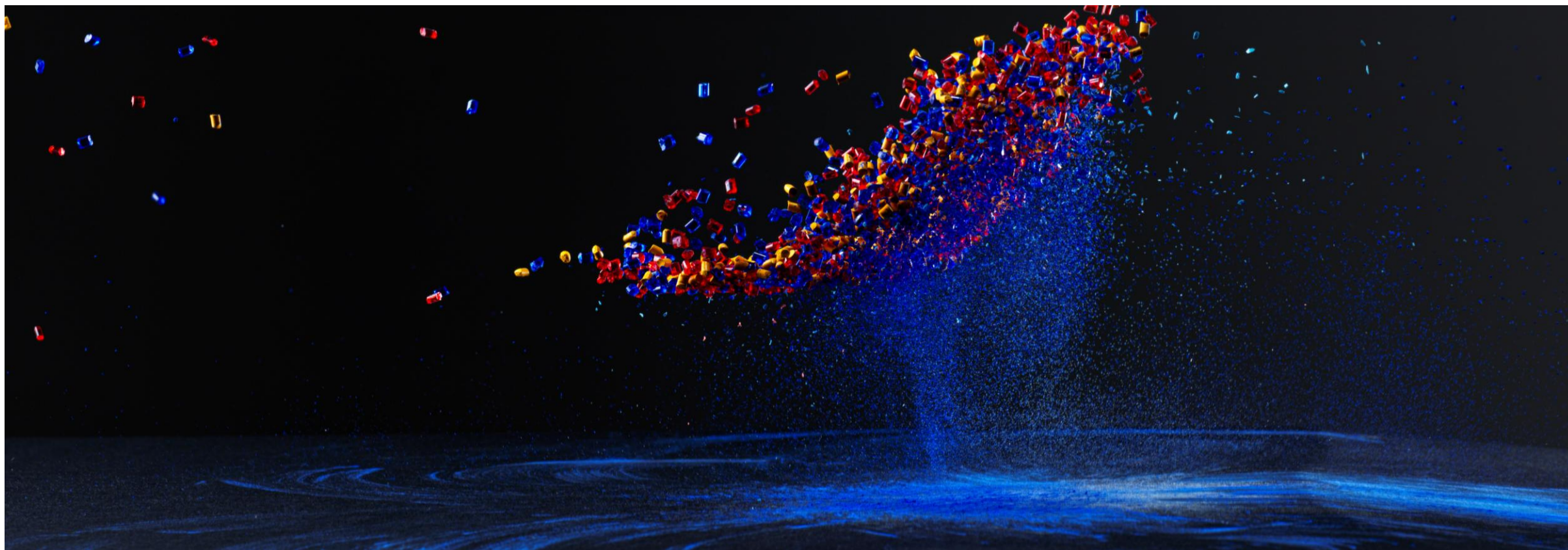
Seasonality is a key factor



% Difference Avg Daily minutes in Quarter vs. Country annual average | Individuals aged 5+

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An evolving ecosystem



Programmatic Advertising growth on the large screen



Europe sees CTV account for 77% of ad views

Programmatic ad views +40% in Europe on LIVE and VOD

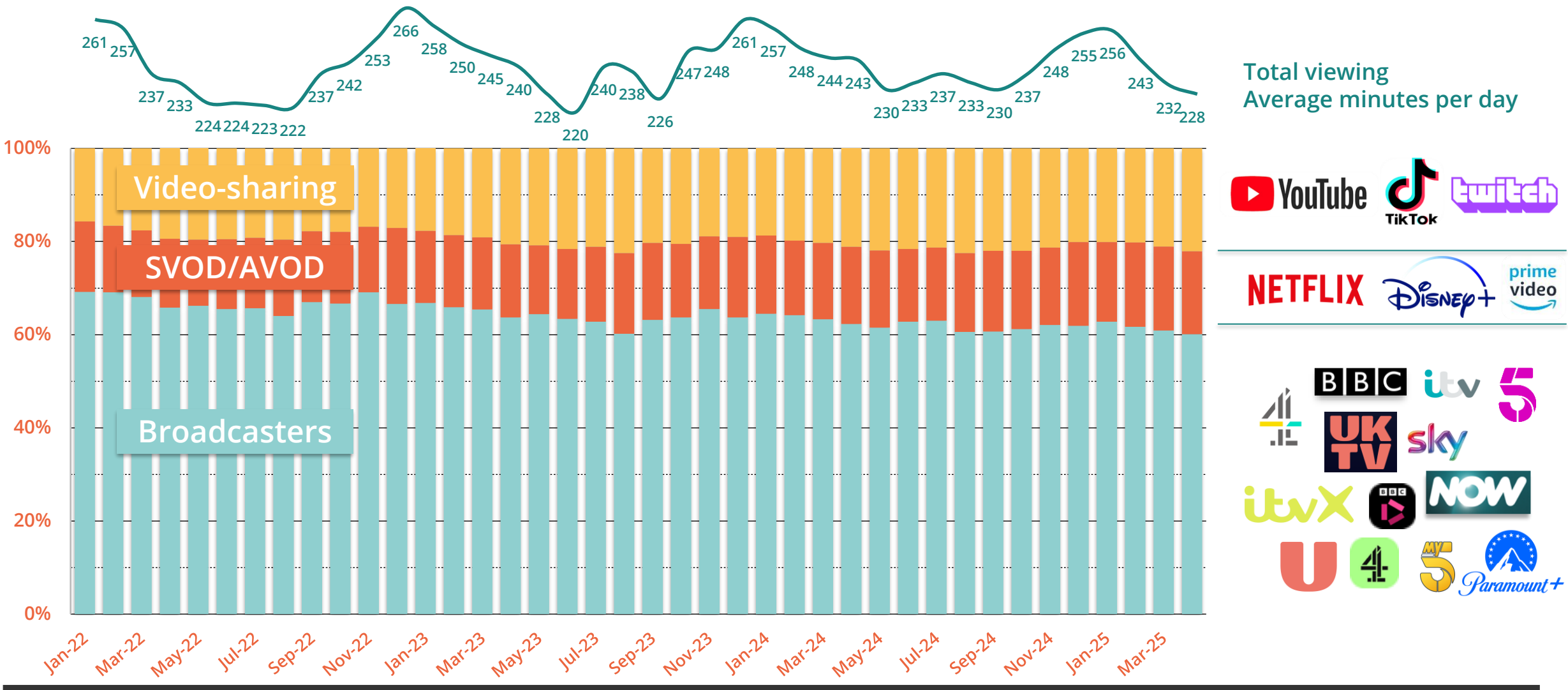
Streaming is unlocking innovation including 1-2-1 messaging and direct relationships like QR codes and eCommerce



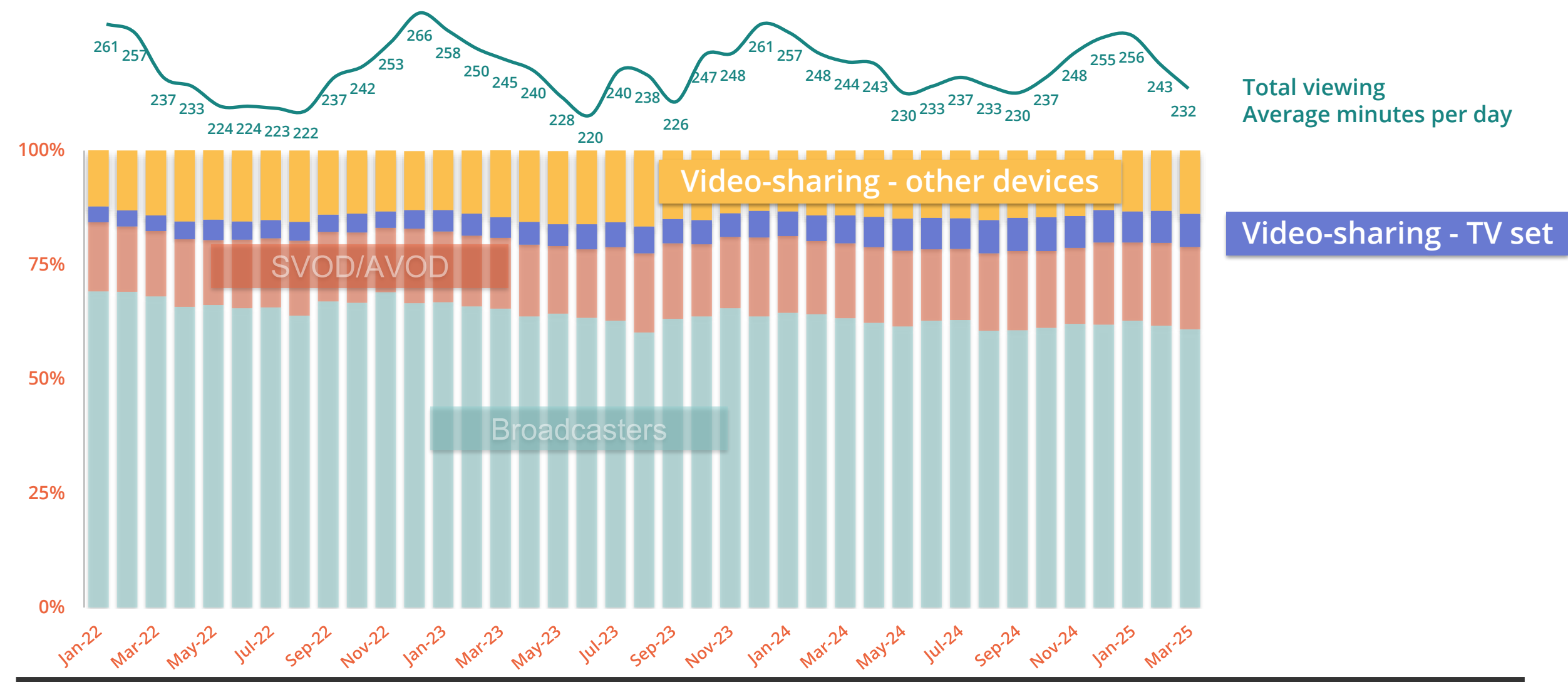
Globally, TV, including both traditional and streaming TV, is expected to grow 1.0% in 2025 to \$162.5 billion.

Streaming TV will represent just over a quarter of the total (\$41.8 billion) in 2025, but will increase rapidly over the next five years, reaching \$71.9 billion in 2030, or more than 40% of the TV total.

Observing viewing on all platforms and screens: UK's Barb

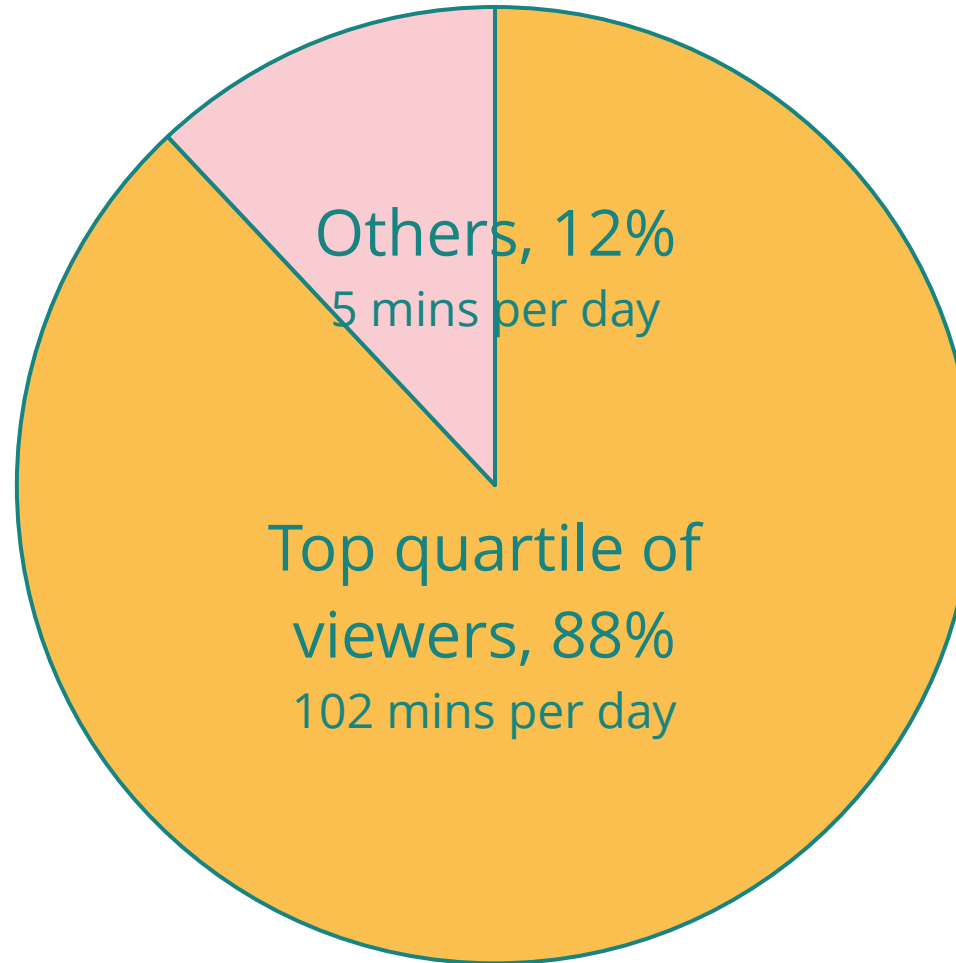


Growth of video-sharing on TV sets



Quartile analysis reveals size of heavy viewers in UK

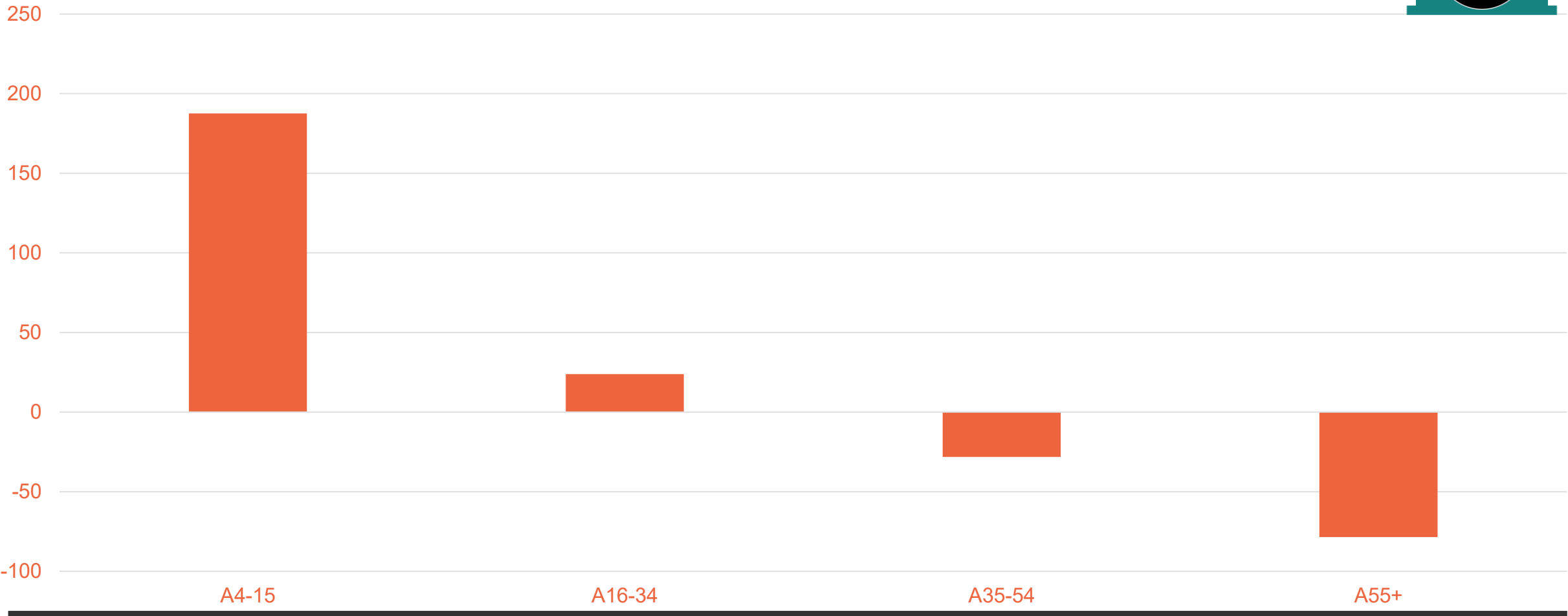
Share of time viewing YouTube – Top quartile v Rest of viewers
All 16+, TV-set



YouTube's UK share of viewing is dominated by children

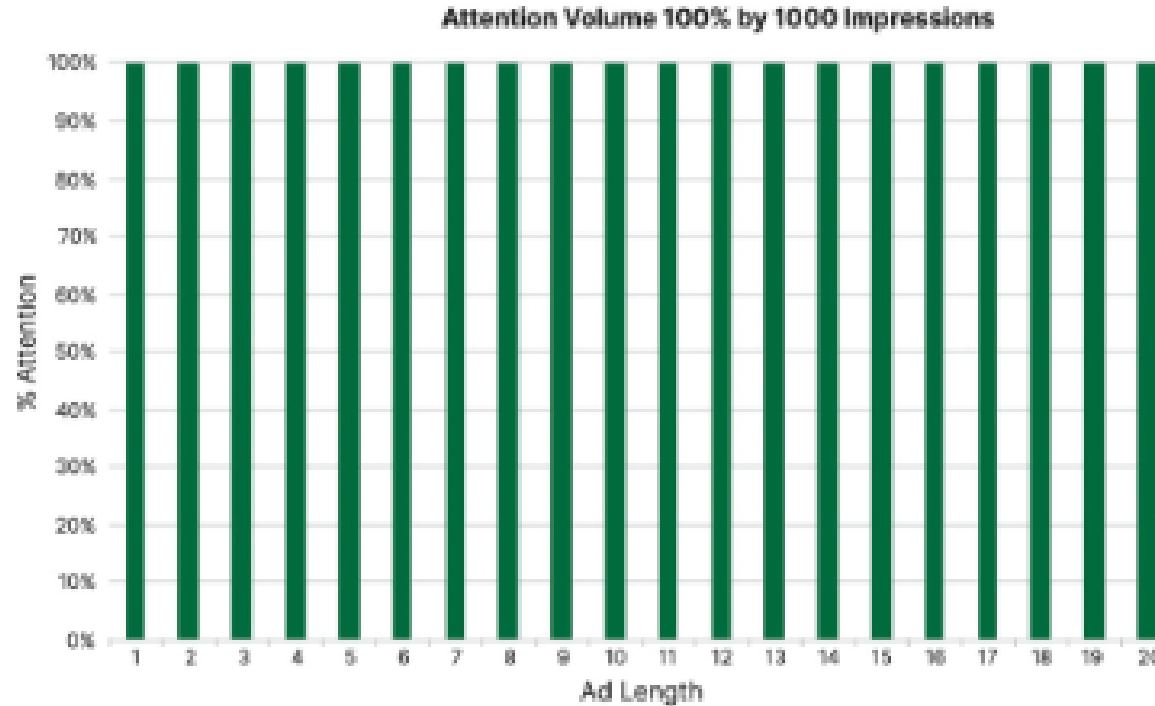


Share of Total Identified Viewing indexed against share of population



Attention Metrics

If all impressions were equal reach-based planning between different media channels and platforms would have the same Attention “curve”

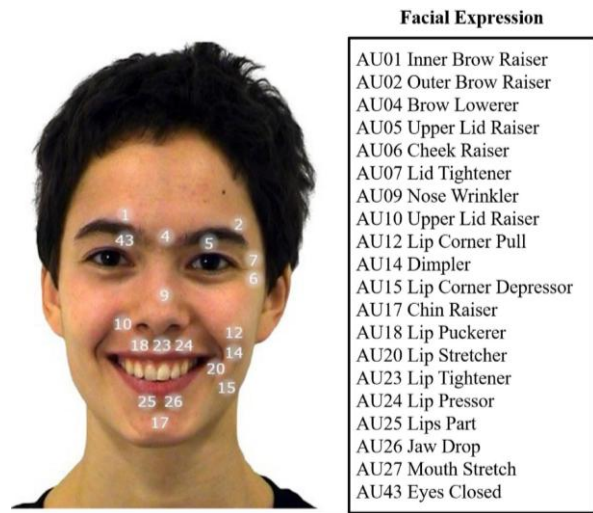


ATTENTION – can be more than “OBSERVATION”, more a neuroscience!

Eye Tracking



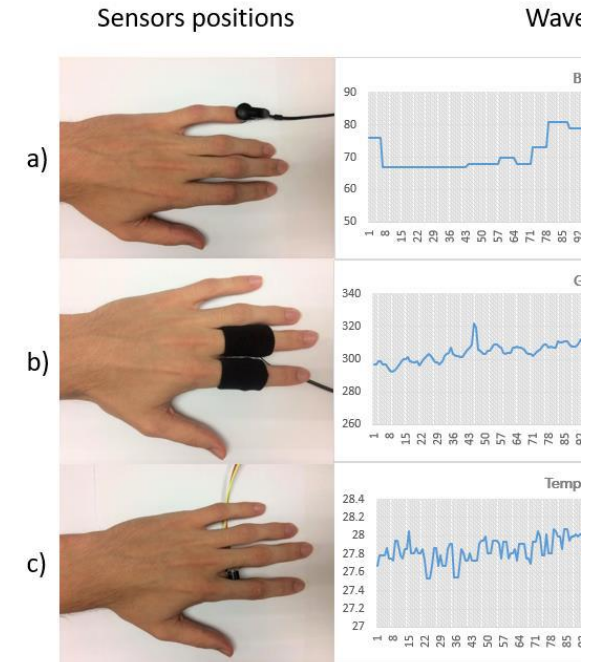
Facial Coding



EEG Electroencephalography



Galvanic Skin Response

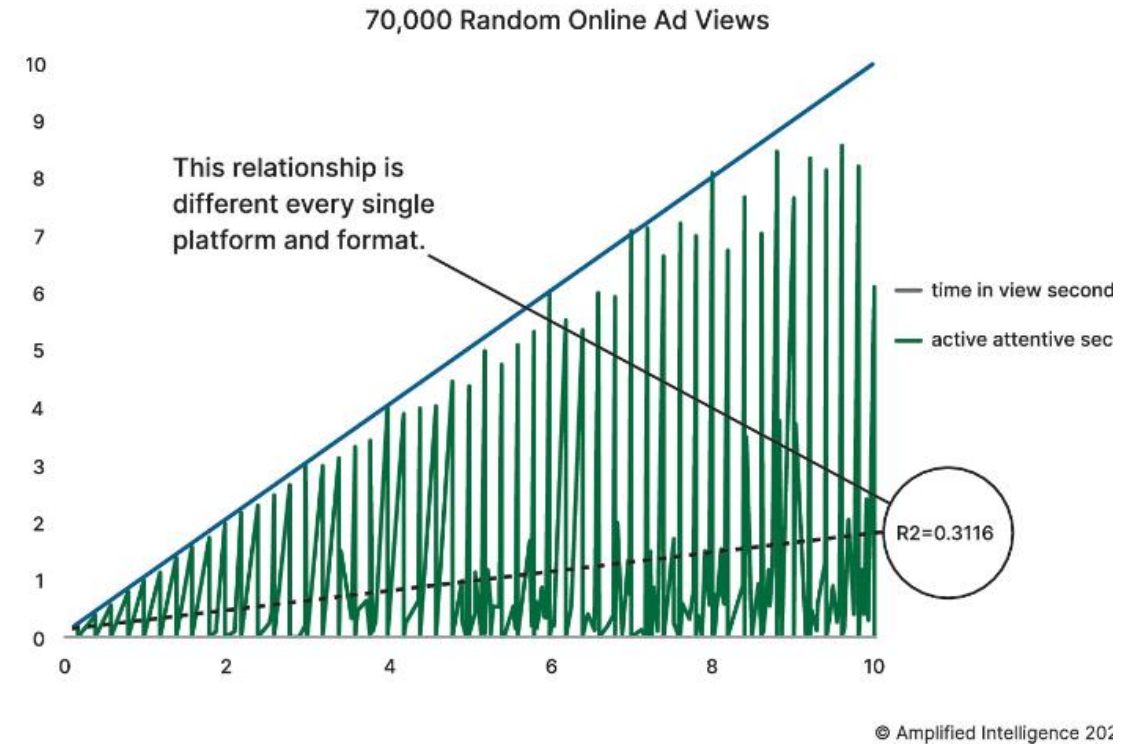
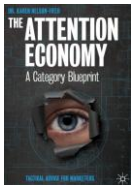


Active attention, net of time in view

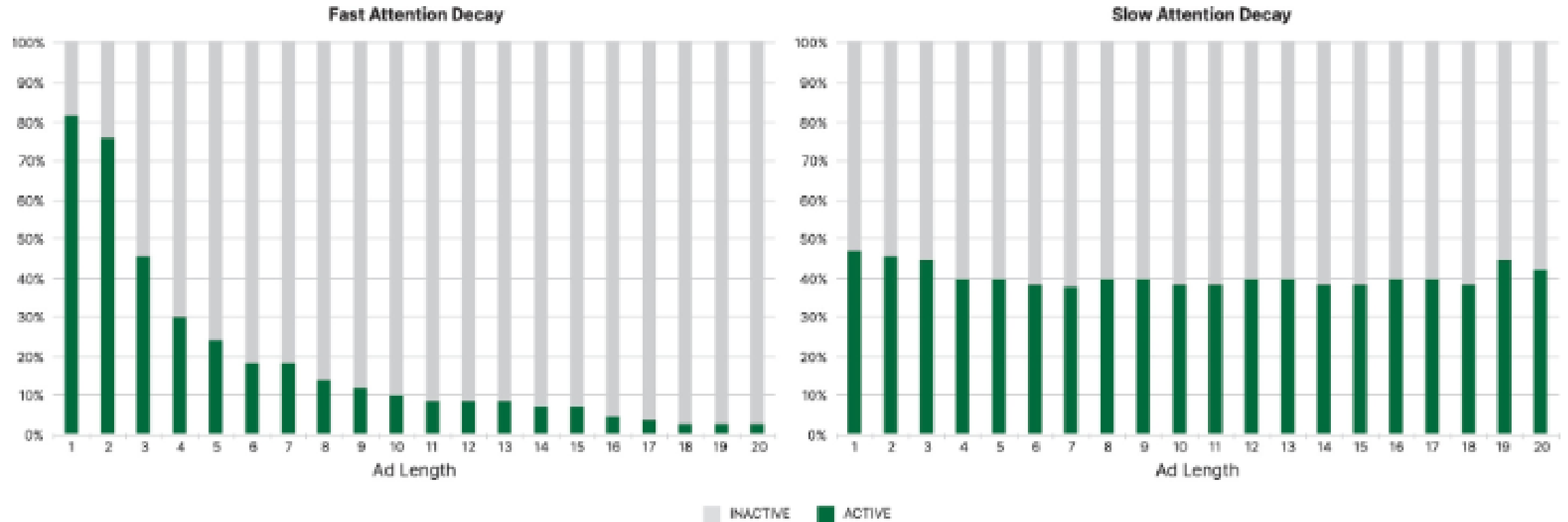
The industry is getting its head into understanding attention in cross-media consumption

One in three chance that somebody is looking at the ad while it is on screen.

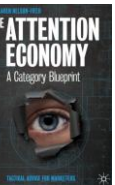
This isn't usually what marketers idealize and plan for



Attention Decay curves show drops in attention are VARIABLE



Attention Decay impact varies by platform user experience, creative of ad, relevance of targeted viewer, content context



No two impressions are the same

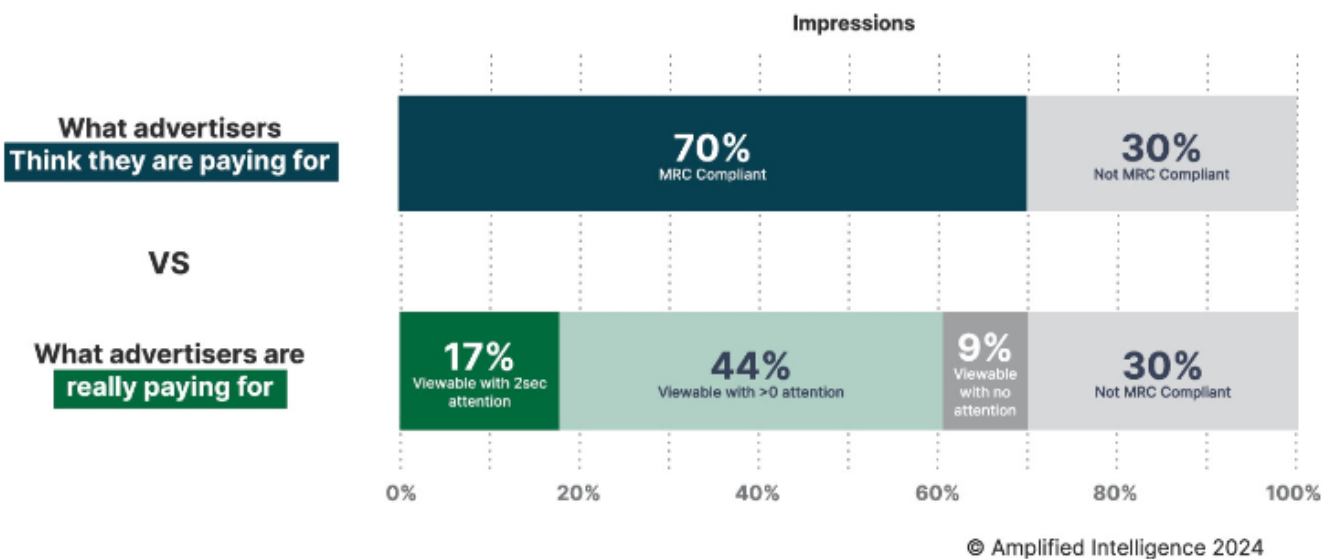


Fig. 2.3 The gap between ‘viewable’ with attention and ‘viewable’ with no attention

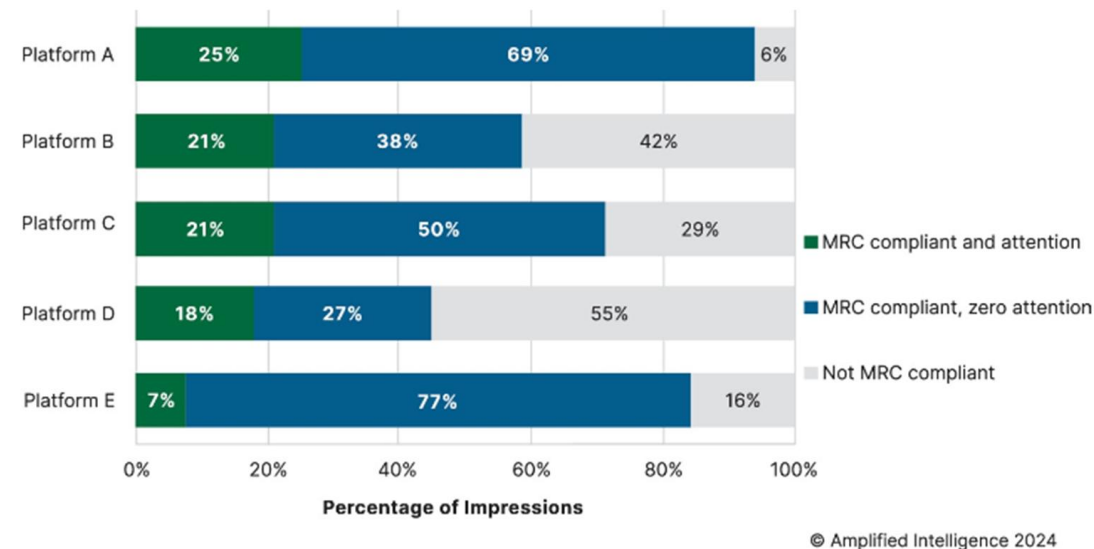


Fig. 2.4 The gap between viewable with attention varies by platform and format



TIAK leadership will see the rollout of Cross Media measurement in 2026

What is Türkiye's road towards a transparent and verified cross-media audience ecosystem?



Thank you

