SOLVING THE VIEWING PUZZLE:
ASSESSING REACH OF SVOD CONTENT ON THE BIG SCREEN

NATHALIE SONCK (SKO), LIESBETH NEKKERS (GfK) – ASI NOVEMBER 2016
SKO – DUTCH TV JIC

Since 2002 TV-JIC audience measurement:
- Advertisers (BVA), Media Agencies (PMA), Public broadcaster (NPO) &
- Sales houses of broadcasters (Screenforce)

Daily TV-ratings
Since 2016 daily online ratings
RUBIK’S CUBE

HOW TO SOLVE IT
<table>
<thead>
<tr>
<th>STARTING SIMPLE 2X2</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV</td>
</tr>
<tr>
<td>x Broadcast moment</td>
</tr>
<tr>
<td>Online</td>
</tr>
<tr>
<td>Viewing moment</td>
</tr>
</tbody>
</table>
KNOWING THE UNKNOWNS

TV viewing time
Total TV screen time
## BUILDING BLOCKS FOR TV

<table>
<thead>
<tr>
<th></th>
<th>TV viewing time</th>
<th>Total TV screen time</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIVE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TSV</td>
<td></td>
<td></td>
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<tr>
<td>DVD/HDR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV screen other</td>
<td></td>
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</tbody>
</table>
FOCUS ON YOUNGER GENERATIONS
DUTCH ARE HIGHLY DIGITALIZED AND QUICKLY PICK UP ON TRENDS

SOURCE: TRENDS IN DIGITAL MEDIA (DECEMBER 2015); GFK DAM (JANUARY – JUNE 2016, 13 YEARS AND OLDER)

- **Twitter 25% penetration** one of the highest in Europe
- **Addicted to Netflix** since launch Sept 2013
  - 23% Netflix usage
- **Never give up on Teletext**. App users spend 24 min in Dec 2015 (double Dec 2014)
- **Insane Snapchat use among 13 – 17 year olds**: 52%
- **NU.nl competing as Sanoma’s news app against global platforms**: 55% reach
- **Quick to pick up on Pokémon trend**: 16% has used the app within a month of its release
OVERALL TOTAL TV SCREEN USAGE STABLE...
NON BROADCAST VIEWING INCREASED AND NOW STABILIZING
SVOD SERVICES

<table>
<thead>
<tr>
<th>Year</th>
<th>SVOD 2014</th>
<th>SVOD 2015</th>
<th>SVOD 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>12%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>22%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>33%</td>
<td>23%</td>
<td></td>
</tr>
</tbody>
</table>
Is it a **NETFLIX** world yet?

Netflix is well established in some markets, but not all, particularly in APAC & Europe outside UK, & NL

% of all adults who currently use Netflix

% of all adults who currently use another SVOD provider

Source: GfK Viewscape 2016
VOD LIBRARY IS ADDED TO TV MEASUREMENT

LIVE

TSV

DVD/HDR

TV screen other (VOD library)
NETFLIX ON THE BIG SCREEN

- Highest reach 25 – 34 year olds
- Highest viewing time on Sundays
- 77% of viewing via media center
THE MORE NETFLIX, THE MORE TV
NETFLIX ON SECOND SCREENS: REACH JAN – JUNE 2016

Source: GfK DAM (January – June 2016, 13 years and older)
SVOD TRENDS

- Increase SVOD viewing on all screens, especially Netflix
- Viewing time SVOD on big screen seems to be stabilizing
- Netflix viewers also love broadcast content
WHEN WILL TSV LEVEL OUT?
WHAT WILL THE FUTURE BRING?

hours of viewing per week

age

born in 1985 (36 yrs)
born in 2000 (16 yrs)
# INTERPLAY BETWEEN CONTENT – DEVICES – CONSUMERS

## CONTENT
- TV content online
- Online content on TV
- Global SVOD-players
- Targeted audience
- Recommendation engines

## DEVICES
- TV connected devices
- Connected TV’s
- Personal viewing devices

## CONSUMERS
- TSV and VOD viewing
- Out-of-home
- Individualization
- Social
TOOLS NEEDED TO MAKE THE UNKNOWN KNOWN

• Extending video database for audio matching
• Increasing sample rate
• Fusing RPD- and TV-panel
• IP-based measurement
→ Data science
## Reporting Puzzle of Total Viewing

<table>
<thead>
<tr>
<th>TV-screen</th>
<th>Online screens</th>
<th>Crossplatform</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIVE</td>
<td>LIVE</td>
<td>Broadcast content</td>
</tr>
<tr>
<td>TSV</td>
<td>TSV</td>
<td>Number of viewers</td>
</tr>
<tr>
<td>DVD/HDR</td>
<td>Online only</td>
<td>Viewing time</td>
</tr>
<tr>
<td>TV screen other</td>
<td>Online video other</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Video content</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Time spent</td>
</tr>
</tbody>
</table>
How to Solve a Rubix 4 by 4 Cube!

STEP 1!

STEP 2!
Uuummmm...
THANKS FOR YOUR ATTENTION!

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