



STICHTING KIJKONDERZOEK



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

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SKO – DUTCH TV JIC

Since 2002 TV-JIC audience measurement:

Advertisers (BVA), Media Agencies (PMA), Public broadcaster (NPO) &
Sales houses of broadcasters (Screenforce)



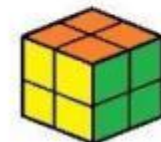
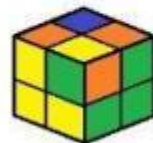
Daily TV-ratings

Since 2016 daily online ratings

RUBIK'S CUBE



HOW TO SOLVE IT



STARTING SIMPLE 2X2

TV

x Broadcast moment

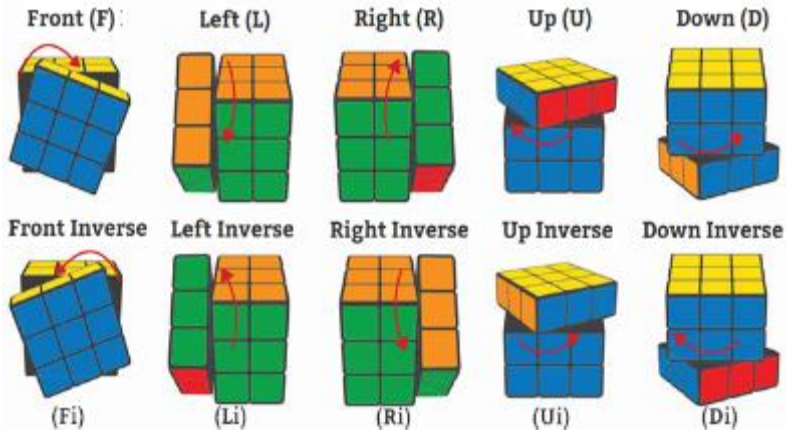
Online

Viewing moment


KNOWING THE UNKNOWNNS

TV viewing time

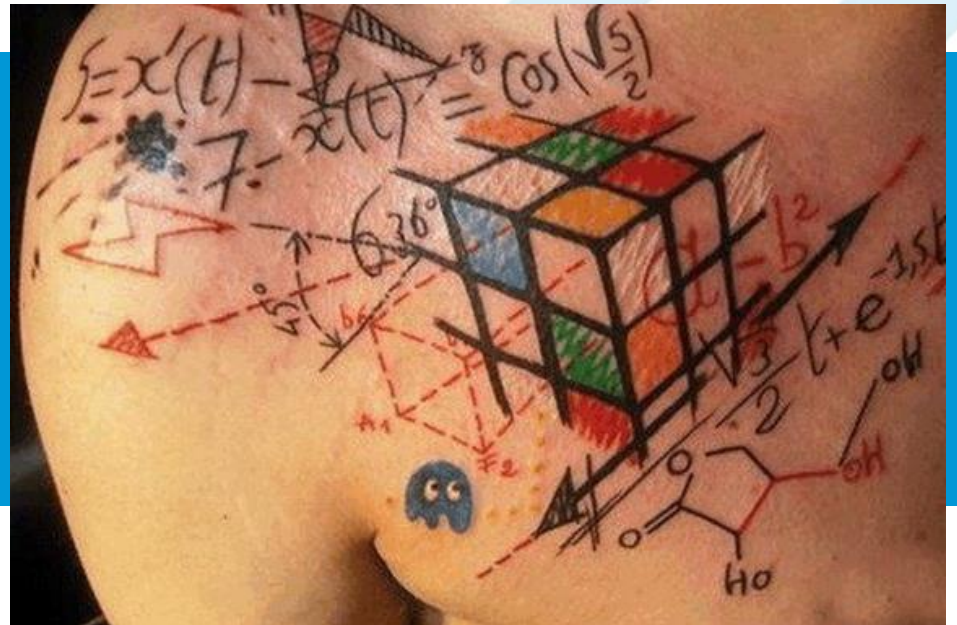
Total TV screen time



BUILDING BLOCKS FOR TV

LIVE	TV viewing time	
TSV		
DVD/HDR		
TV screen other	Total TV screen time	

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



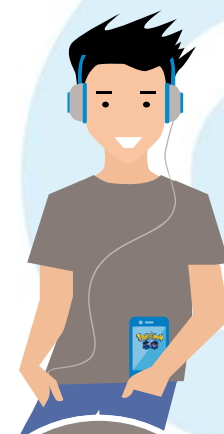
Never give up on **Teletext**. App users spend **24 min** in Dec 2015 (double Dec 2014)



Insane **Snapchat** use among **13 – 17 year olds: 52%**

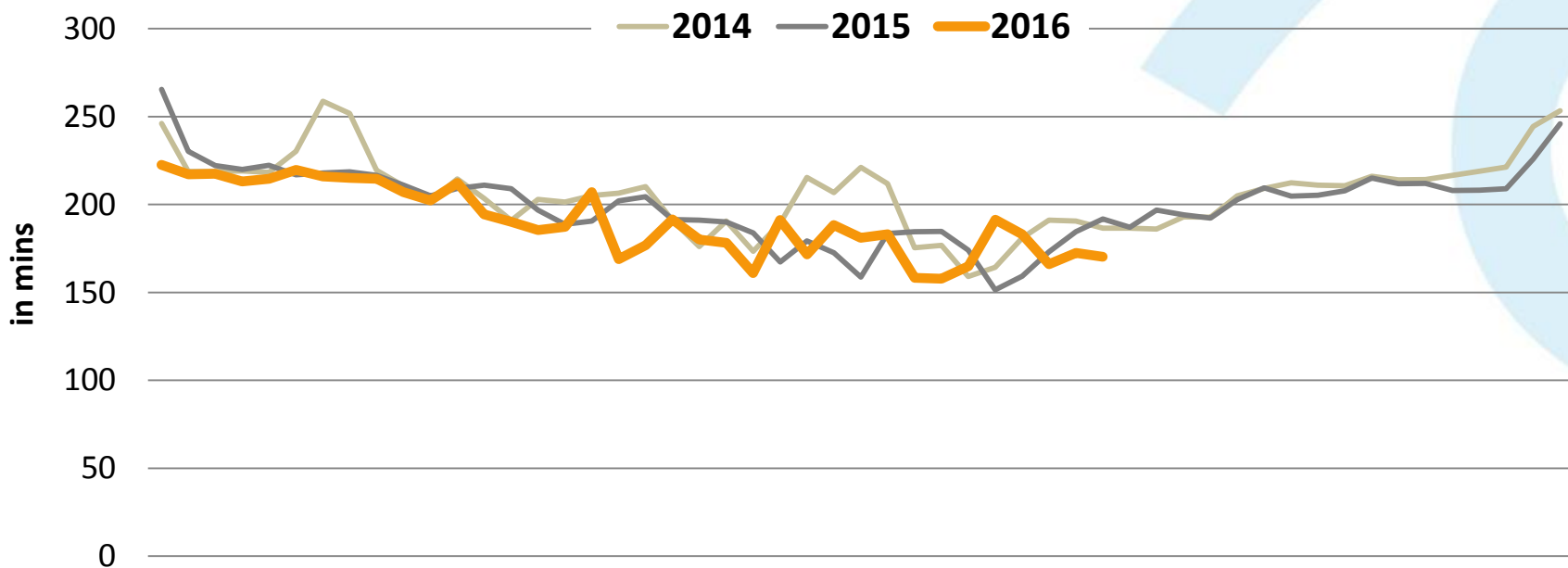


NU.nl competing as Sanoma's news app against global platforms: **55%** reach

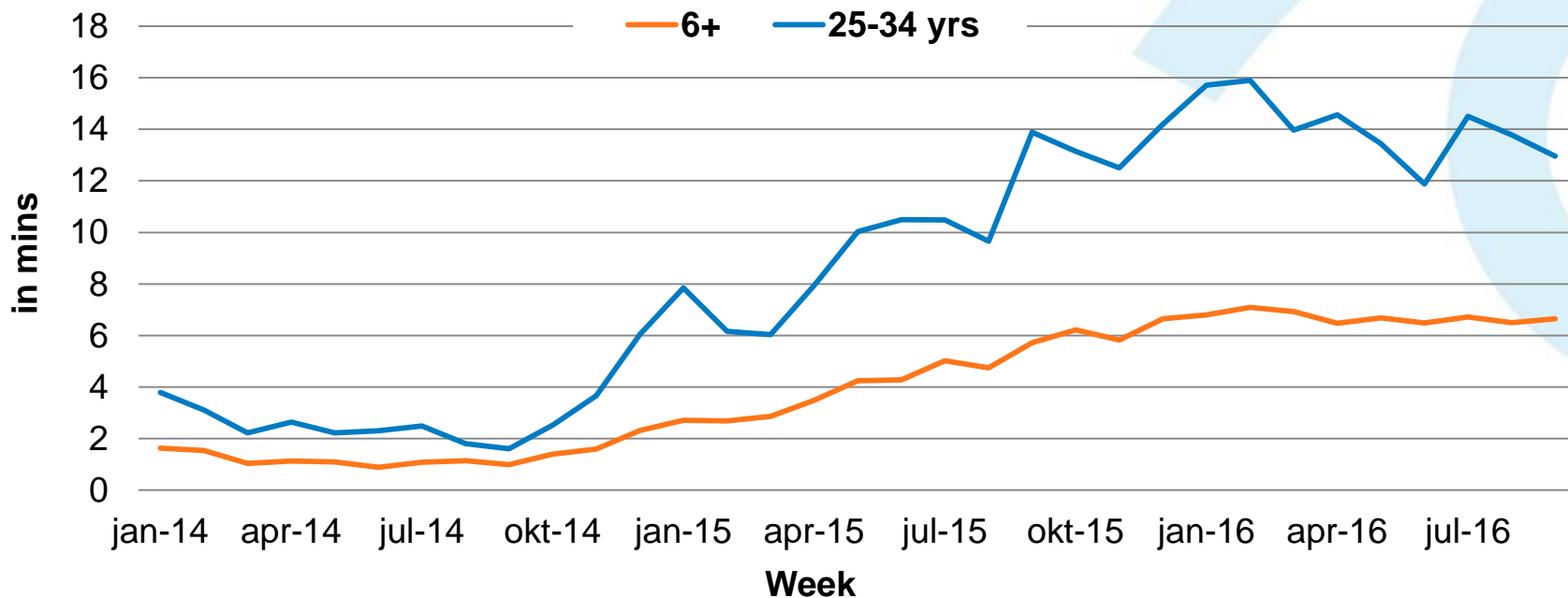


Quick to pick up on **Pokémon** trend: **16%** has used the app within a month of its release

OVERALL TOTAL TV SCREEN USAGE STABLE...



....NON BROADCAST VIEWING INCREASED AND NOW STABILIZING



SVOD SERVICES


	SVOD	NETFLIX
2014	12%	7%
2015	22%	15%
2016	33%	23%

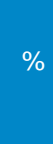


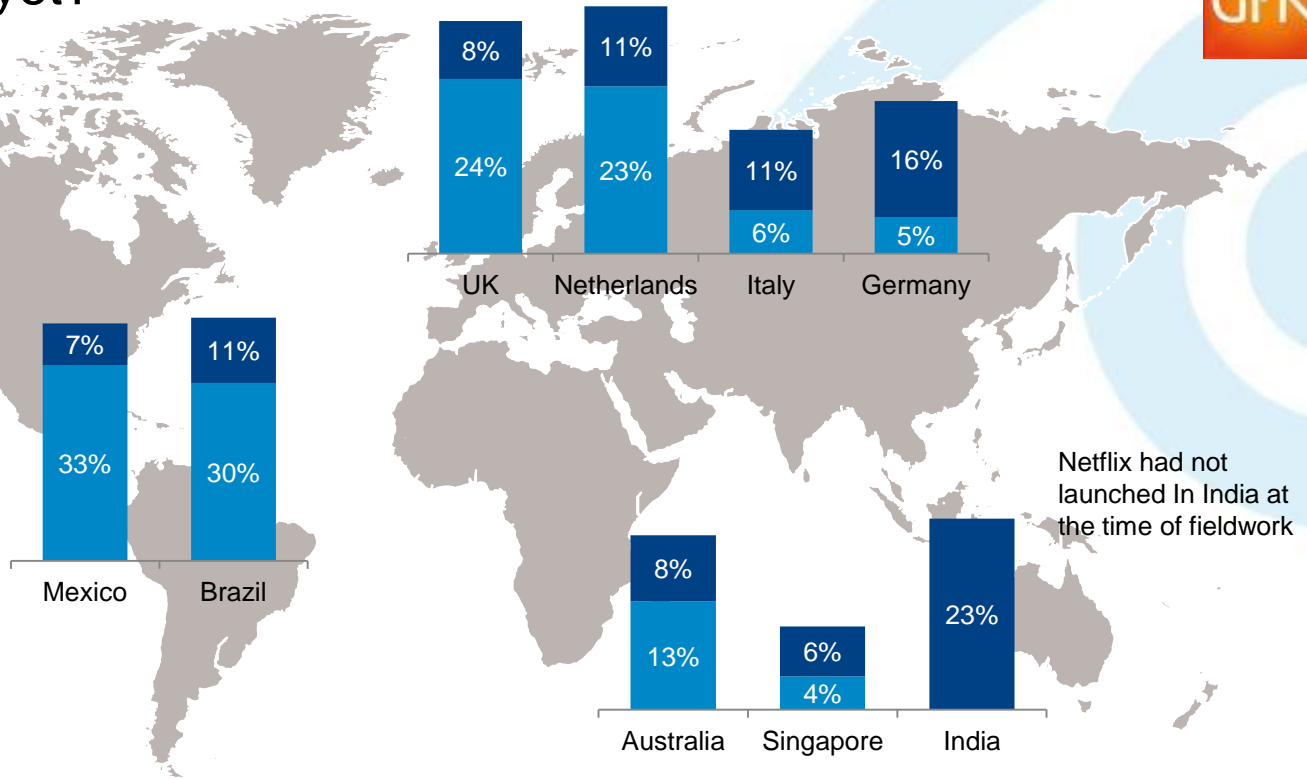
Is it a **NETFLIX** world yet?



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

 % of all adults who currently use another SVOD provider

 % of all adults who currently use Netflix



VOD LIBRARY IS ADDED TO TV MEASUREMENT

LIVE

TSV

DVD/HDR

TV screen other (VOD library)



NETFLIX ON THE BIG SCREEN

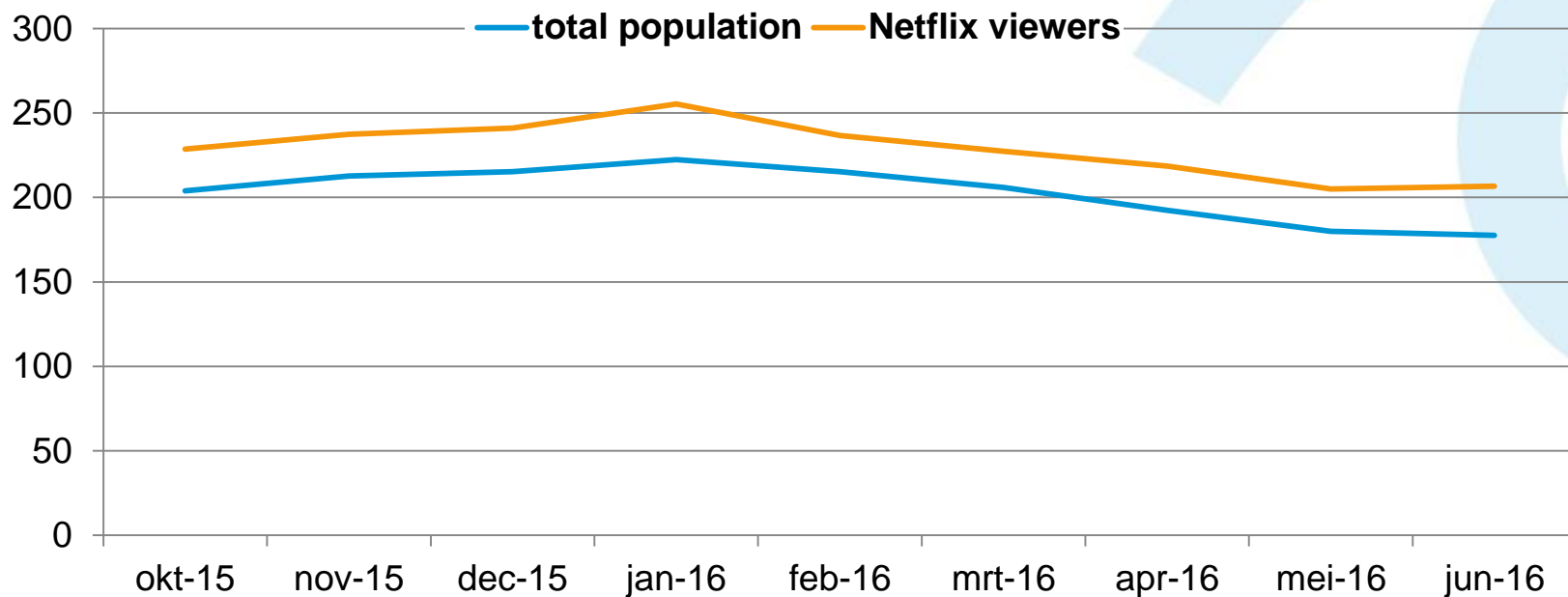
Highest reach 25 – 34 year olds

Highest viewing time on Sundays

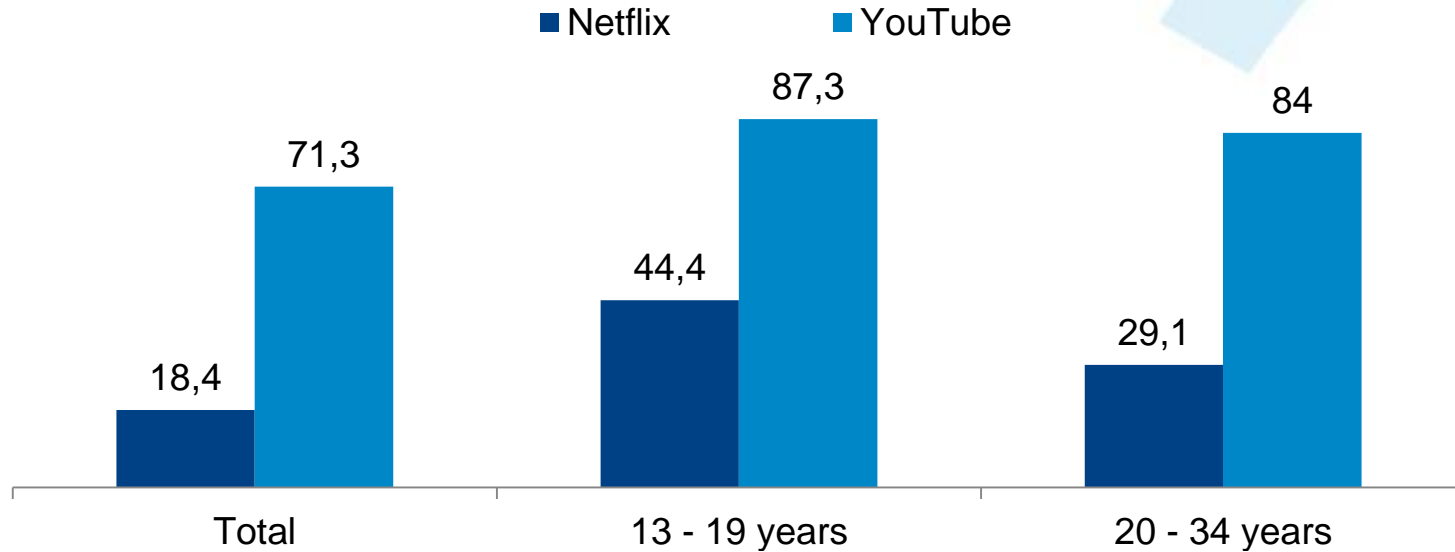
77% of viewing via media center



THE MORE NETFLIX, THE MORE TV



NETFLIX ON SECOND SCREENS: REACH JAN – JUNE 2016



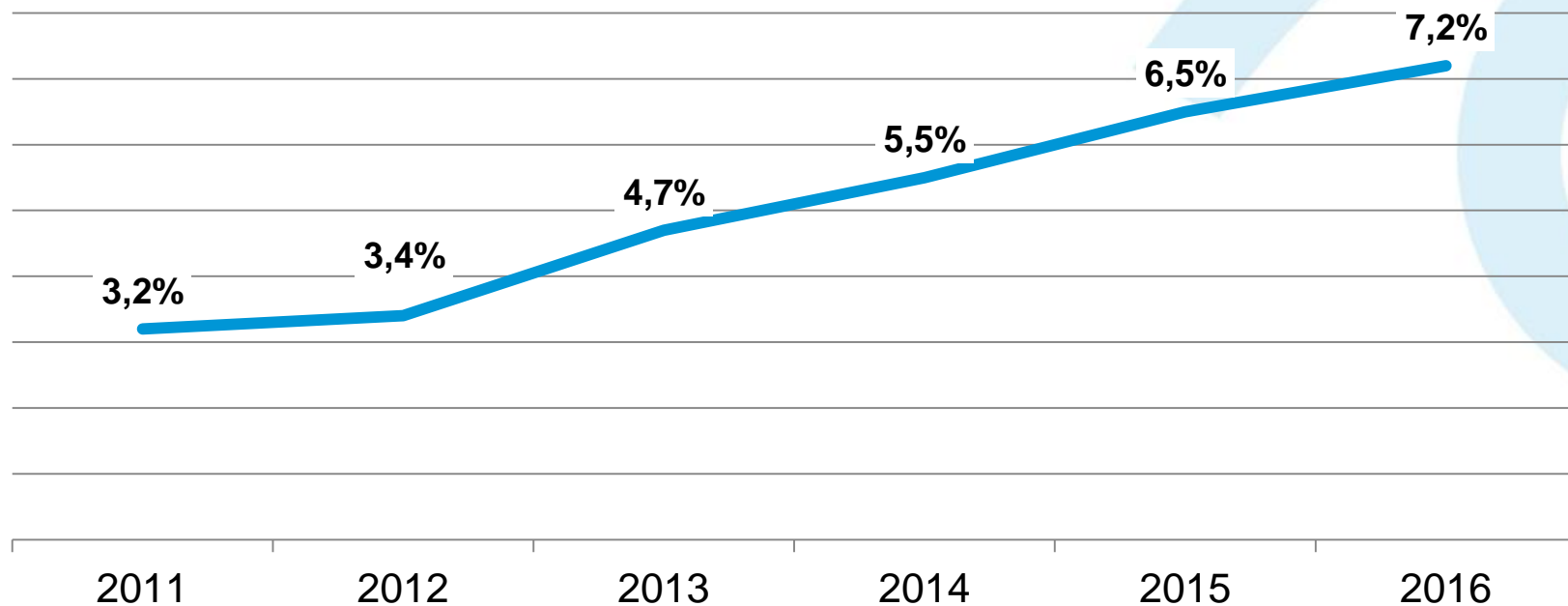
Source: GfK DAM (January – June 2016, 13 years and older)

SVOD TRENDS

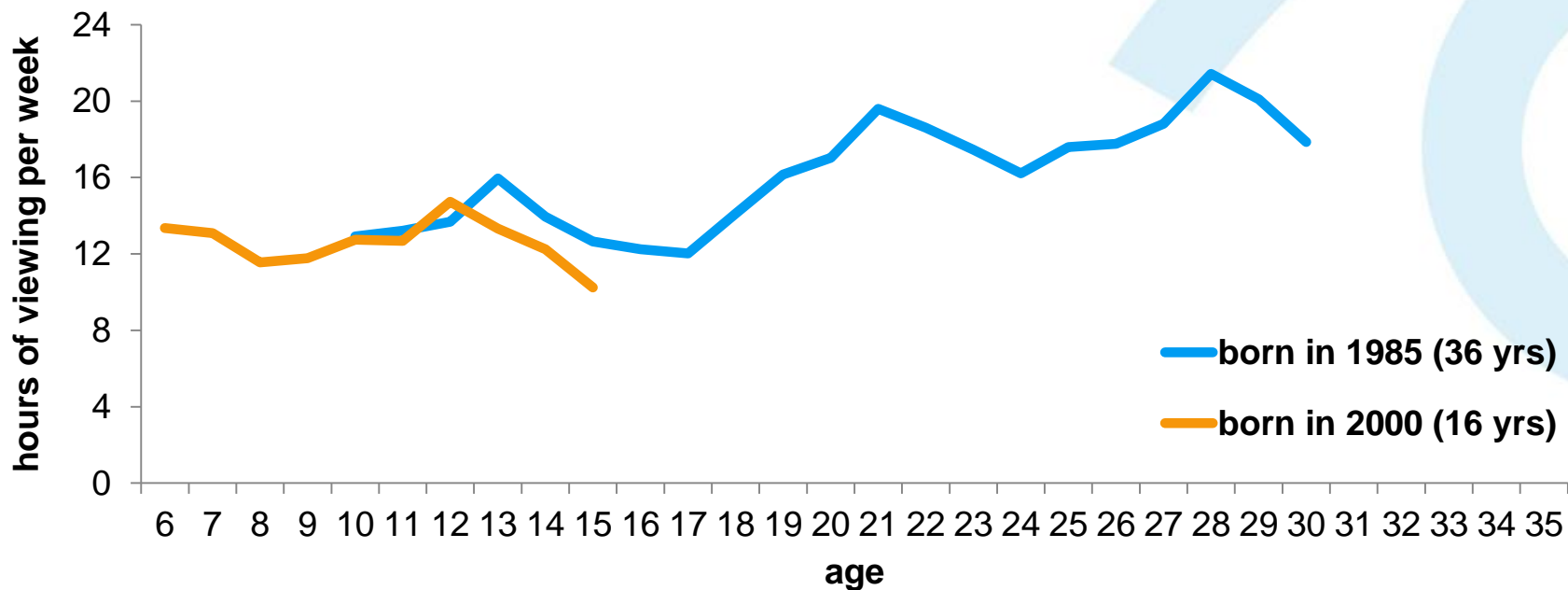
- Increase SVOD viewing on all screens, especially Netflix
- Viewing time SVOD on big screen seems to be stabilizing
- Netflix viewers also love broadcast content
- 25 – 34 year olds watch Netflix on big screen. Teenagers on second screen.



WHEN WILL TSV LEVEL OUT?



WHAT WILL THE FUTURE BRING?



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

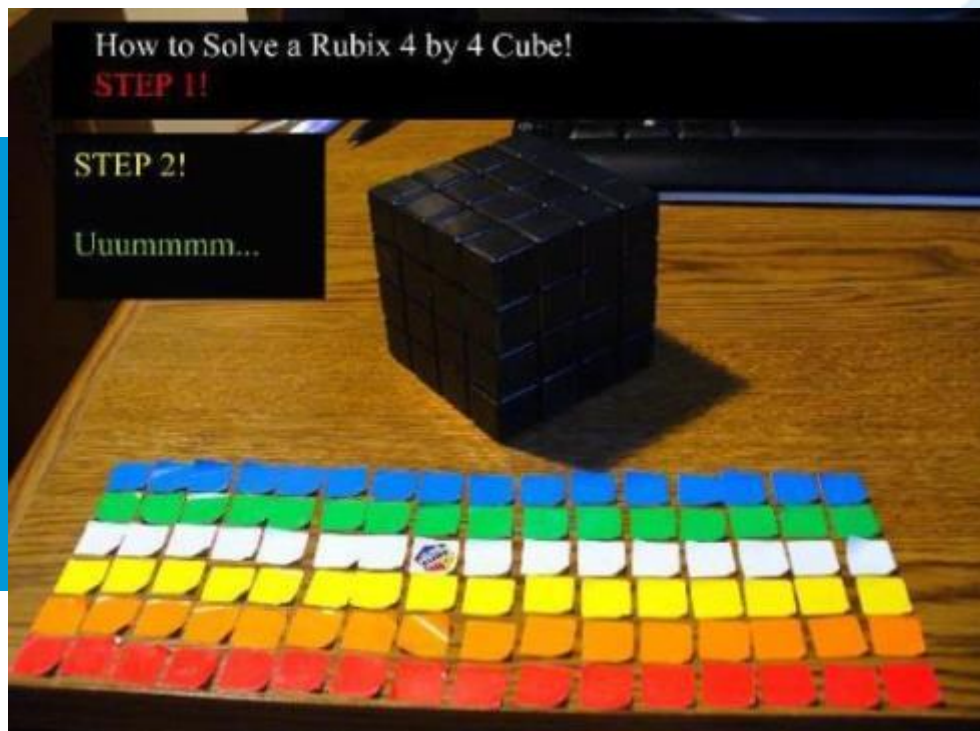
TOOLS NEEDED TO MAKE THE UNKNOWN KNOWN

- Extending video database for audio matching
 - Increasing sample rate
 - Fusing RPD- and TV-panel
 - IP-based measurement
- Data science



REPORTING PUZZLE OF TOTAL VIEWING

TV-screen	Online screens	Crossplatform
LIVE	LIVE	Broadcast content Number of viewers Viewing time
TSV	TSV	Video content Reach Time spent
DVD/HDR TV screen other	Online only Online video other	



THANKS FOR YOUR ATTENTION!



SKO

TV PANEL

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