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
STARTING SIMPLE 2X2

TV x Broadcast moment
Online Viewing moment
KNOWING THE UNKNOWNS

TV viewing time
Total TV screen time
### Building Blocks for TV

<table>
<thead>
<tr>
<th>Block</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LIVE</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TSV</strong></td>
<td>TV viewing time</td>
</tr>
<tr>
<td><strong>DVD/HDR</strong></td>
<td></td>
</tr>
<tr>
<td><strong>TV screen other</strong></td>
<td>Total TV screen time</td>
</tr>
</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

Week

6+ 25-34 yrs

in mins
## SVOD SERVICES

<table>
<thead>
<tr>
<th>Year</th>
<th>SVOD</th>
<th>Netflix</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>2015</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>2016</td>
<td>33%</td>
<td>23%</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

Netflix had not launched in India at the time of fieldwork.

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

- **total population**
- Netflix viewers
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?

2011: 3.2%
2012: 3.4%
2013: 4.7%
2014: 5.5%
2015: 6.5%
2016: 7.2%
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></td>
<td>Online only</td>
<td>Viewing time</td>
</tr>
<tr>
<td>DVD/HDR TV screen</td>
<td>Online video other</td>
<td>Video content</td>
</tr>
<tr>
<td>other</td>
<td></td>
<td>Reach</td>
</tr>
</tbody>
</table>

- TSV: Time Shifted Viewing
- DVD/HDR: DVD, HDR
How to Solve a Rubix 4 by 4 Cube!

STEP 1!

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

nathalie.sonck@kijkonderzoek.nl
Senior Research Manager
www.kijkonderzoek.nl

liesbeth.nekkers@gfk.com
Head of Media Measurement NL
www.gfk.com/nl