

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)



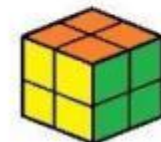
Daily TV-ratings

Since 2016 daily online ratings

RUBIK'S CUBE



HOW TO SOLVE IT



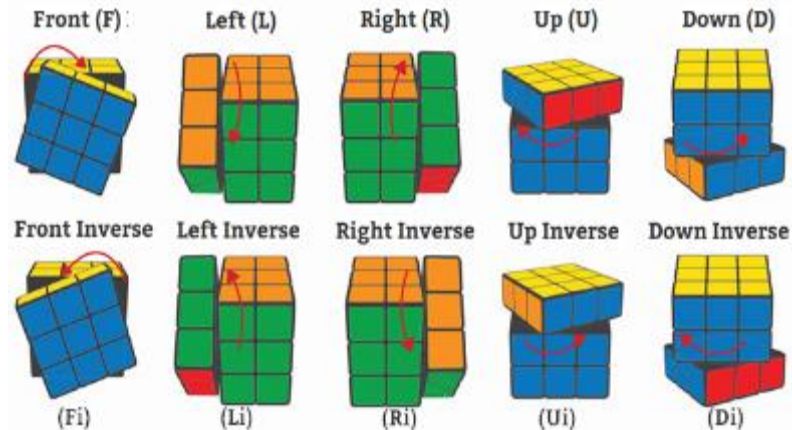
STARTING SIMPLE 2X2

TV	x	Broadcast moment
Online		Viewing moment


KNOWING THE UNKNOWNNS

TV viewing time

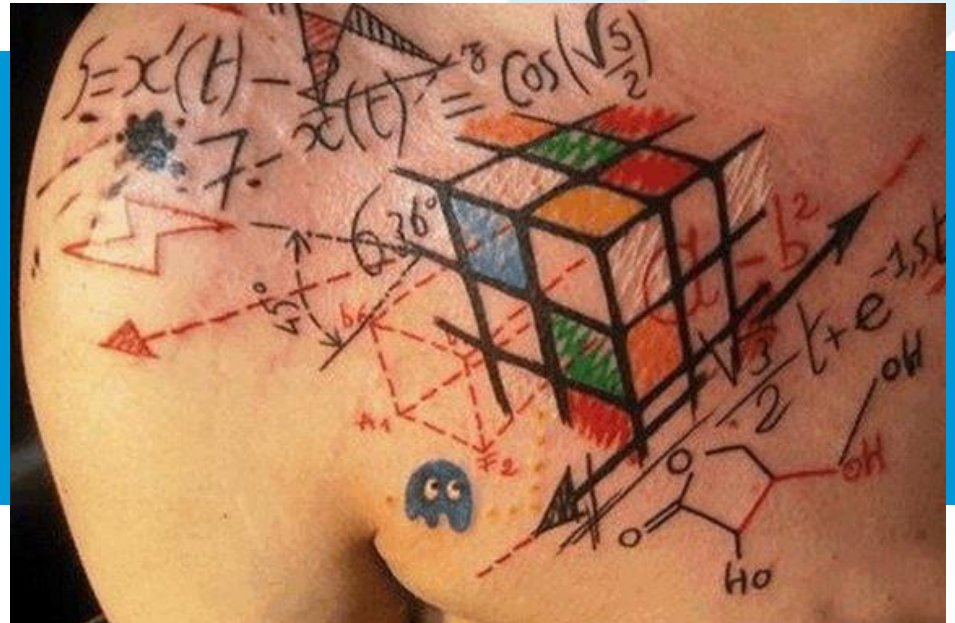
Total TV screen time



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



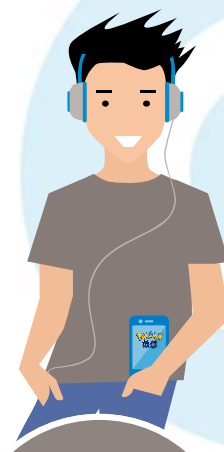
Never give up on Teletext. App users spend 24 min in Dec 2015 (double Dec 2014)



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

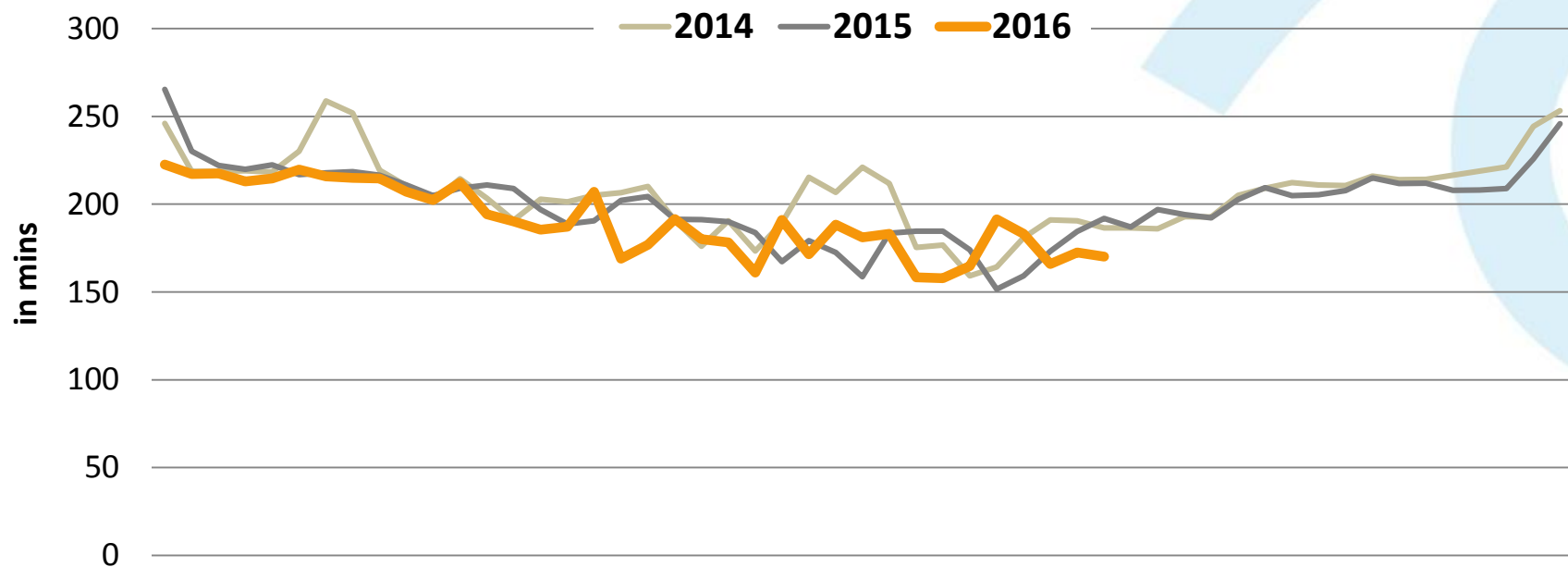


NU.nl competing as Sanoma's news app against global platforms: 55% reach

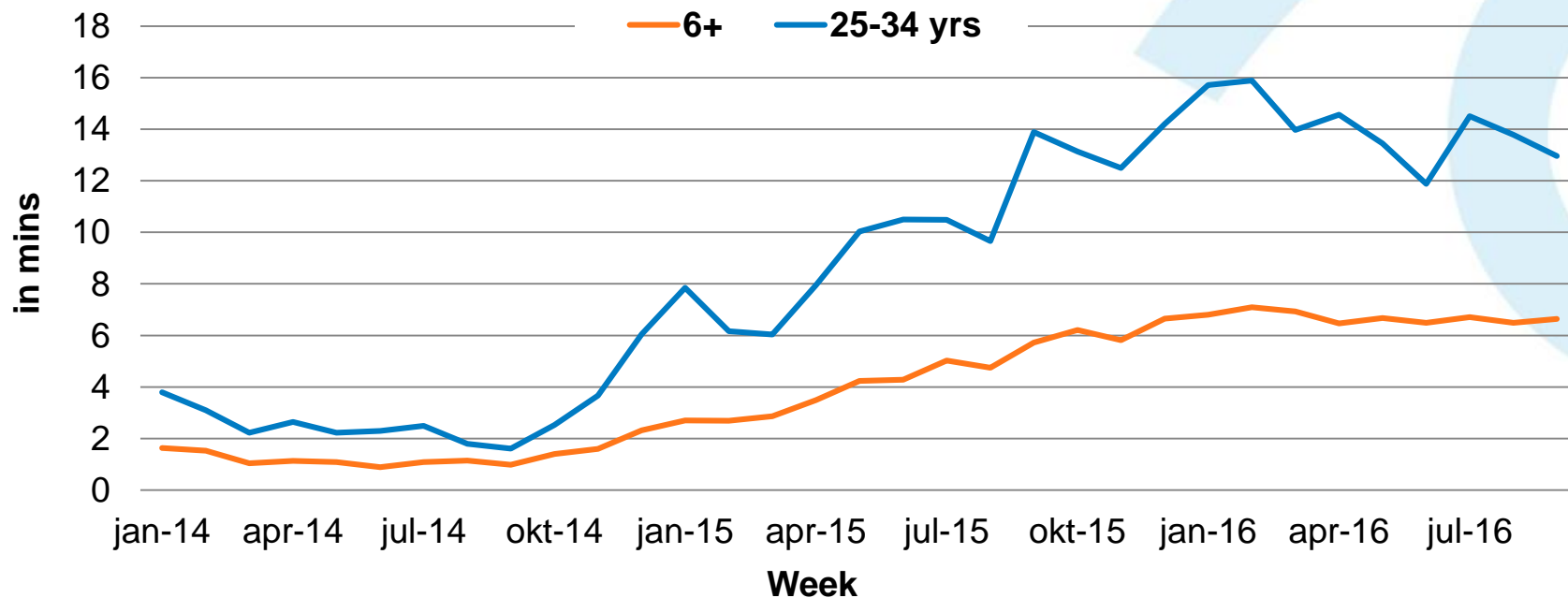


Quick to pick up on Pokémon trend: 16% has used the app within a month of its release

OVERALL TOTAL TV SCREEN USAGE STABLE...



....NON BROADCAST VIEWING INCREASED AND NOW STABILIZING



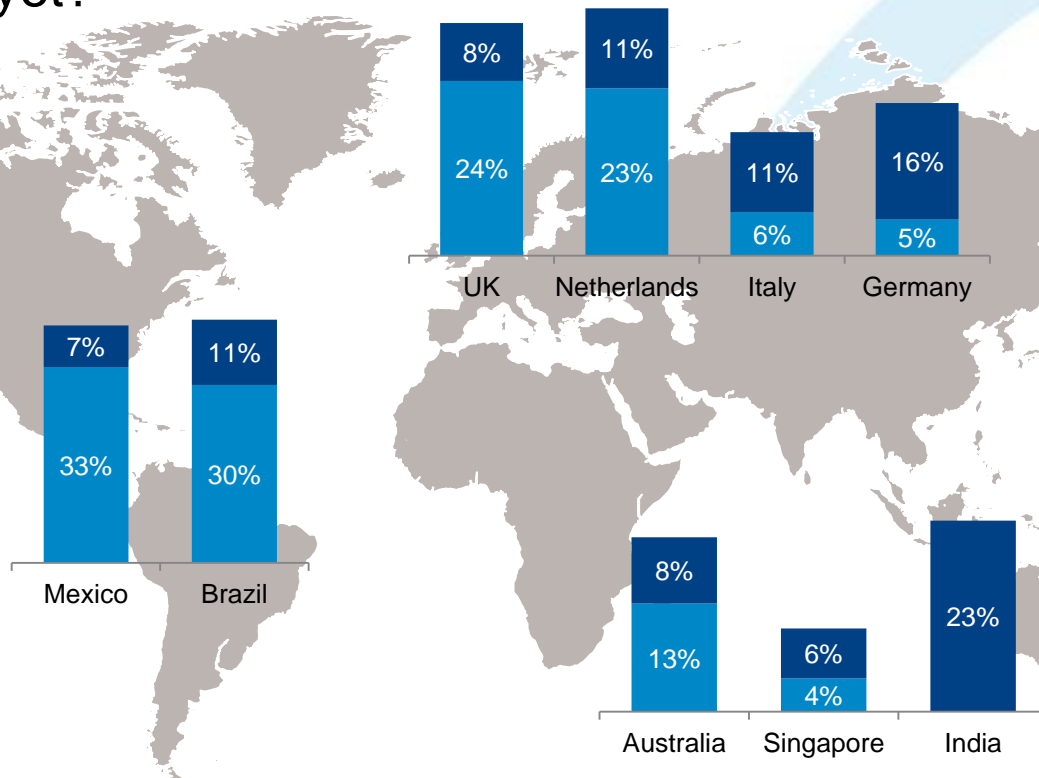
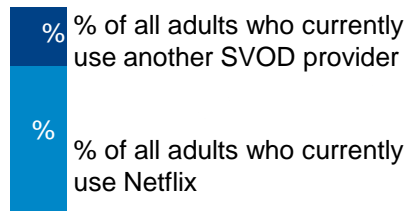
SVOD SERVICES

	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



Netflix had not launched in India at the time of fieldwork

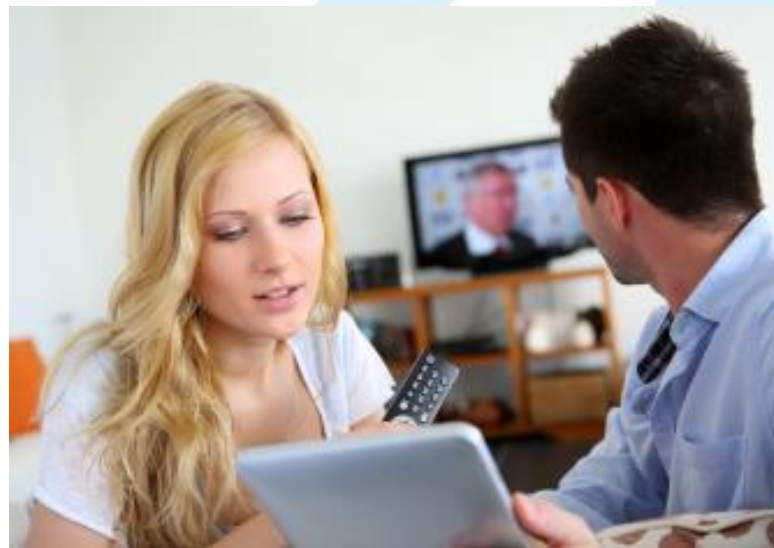
VOD LIBRARY IS ADDED TO TV MEASUREMENT

LIVE

TSV

DVD/HDR

TV screen other (VOD library)



NETFLIX ON THE BIG SCREEN

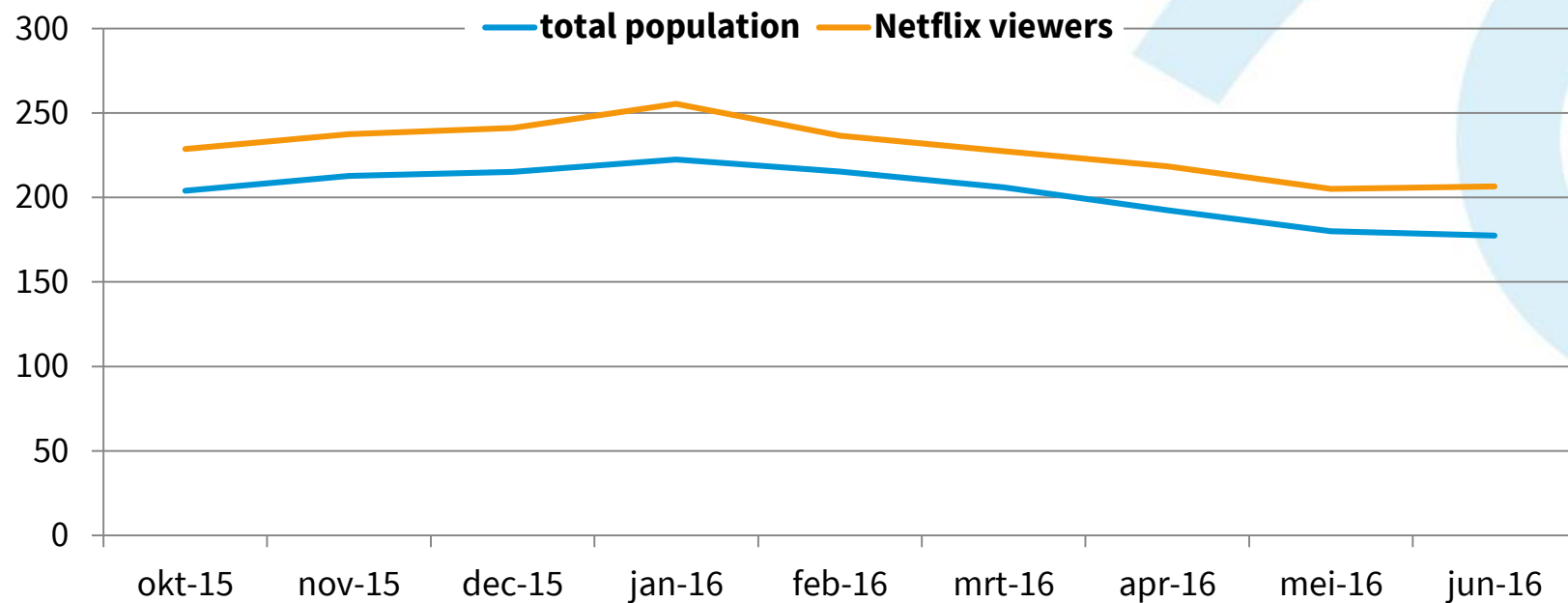
Highest reach 25 – 34 year olds

Highest viewing time on Sundays

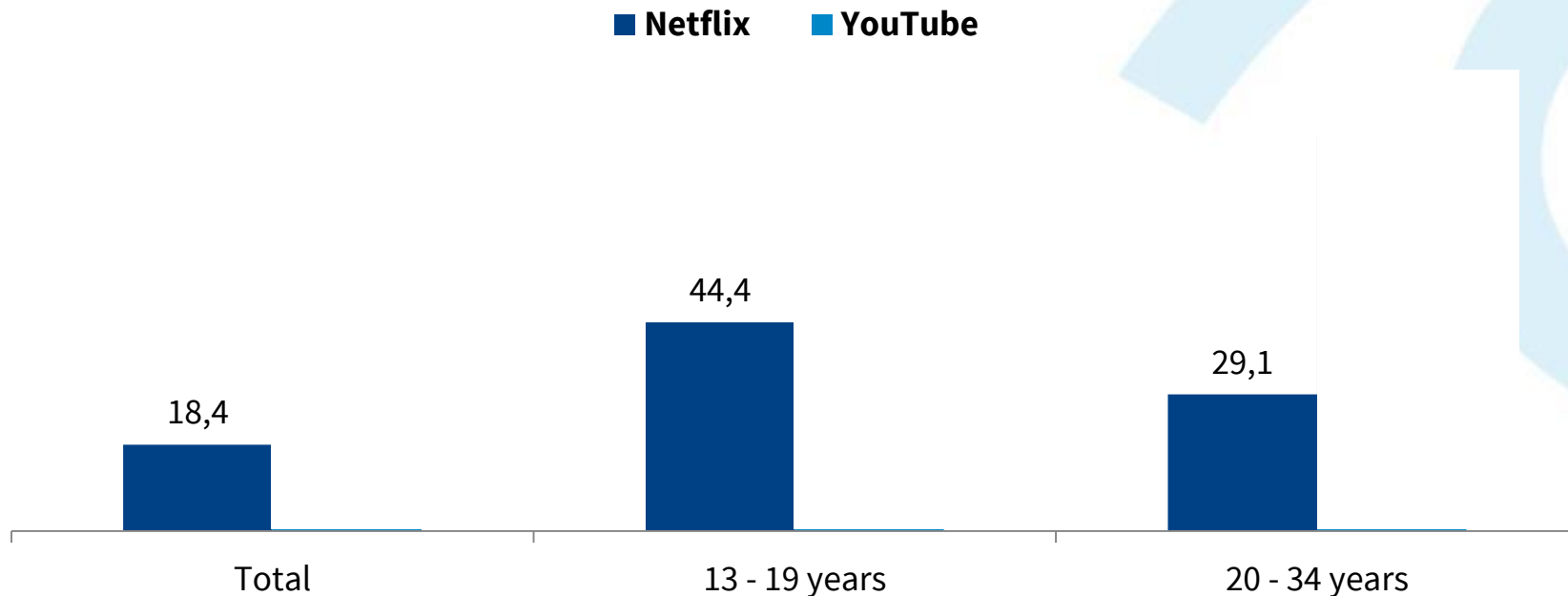
77% of viewing via media center



THE MORE NETFLIX, THE MORE TV



NETFLIX ON SECOND SCREENS: REACH JAN – JUNE 2016



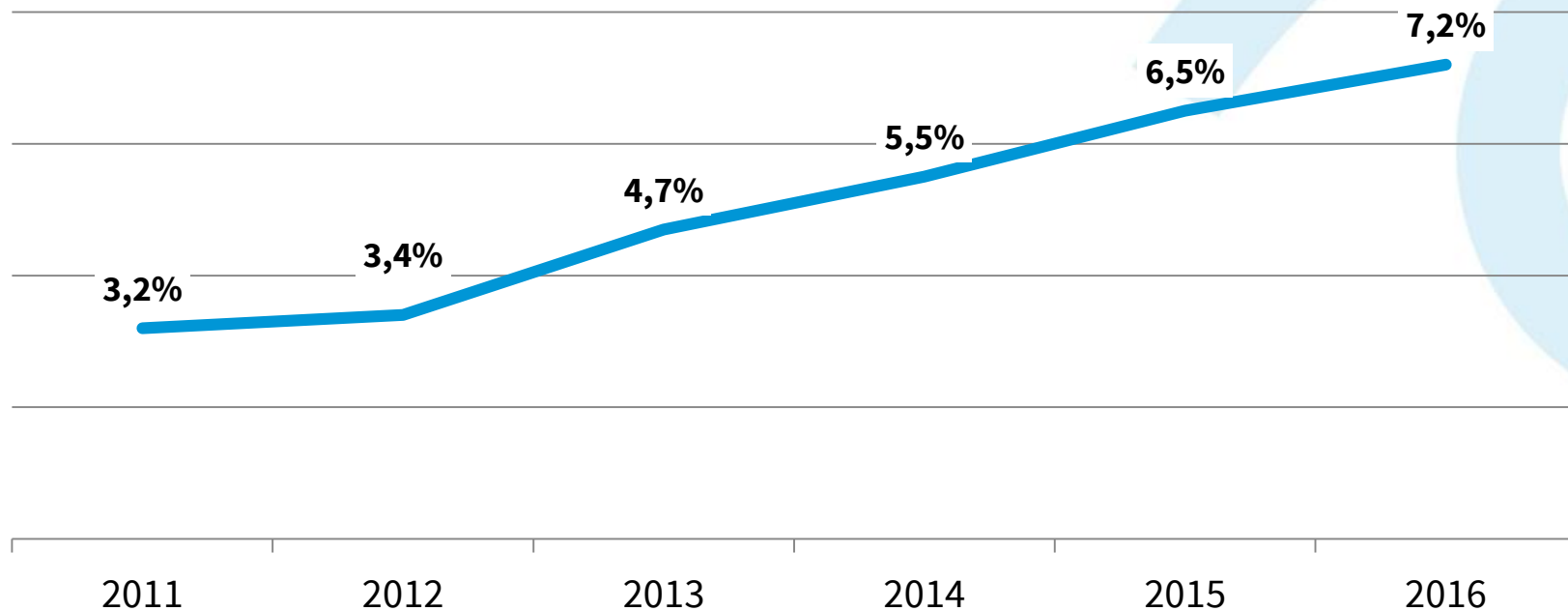
Source: GfK DAM (January – June 2016, 13 years and older)

SVOD TRENDS

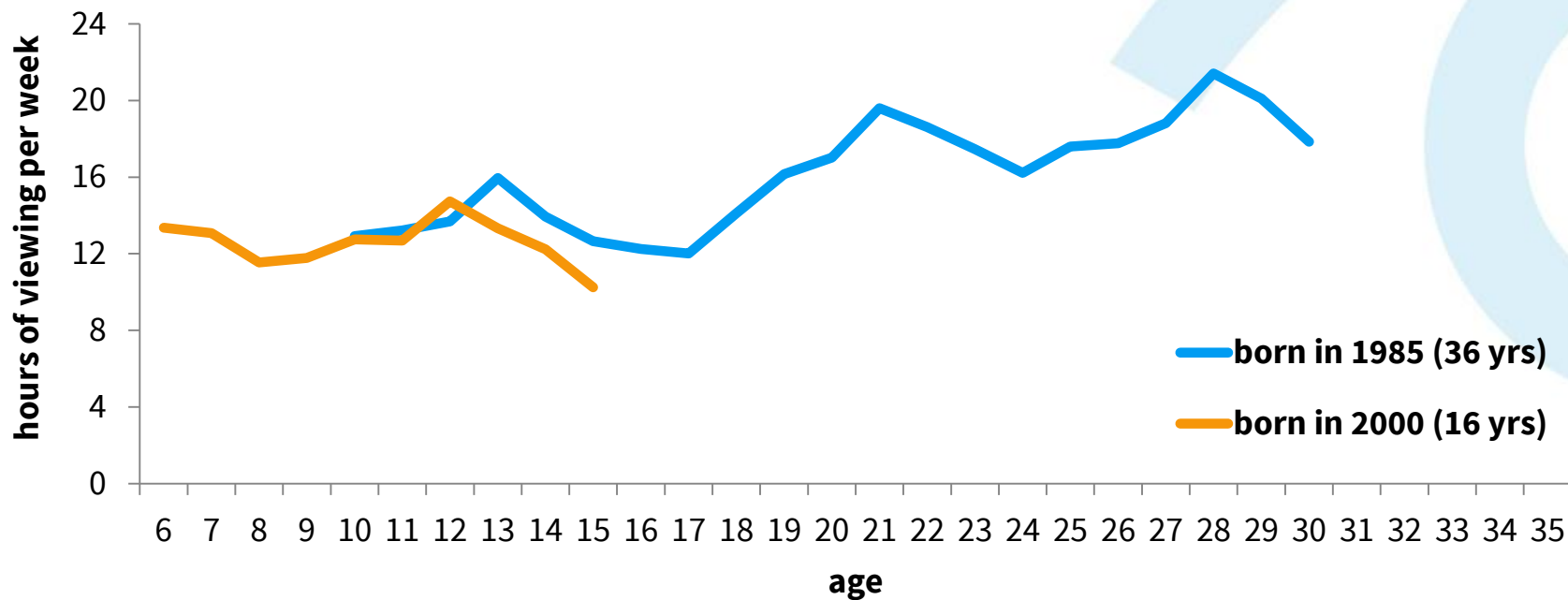
- Increase SVOD viewing on all screens, especially Netflix
- Viewing time SVOD on big screen seems to be stabilizing
- Netflix viewers also love broadcast content
- 25 – 34 year olds watch Netflix on big screen. Teenagers on second screen.



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

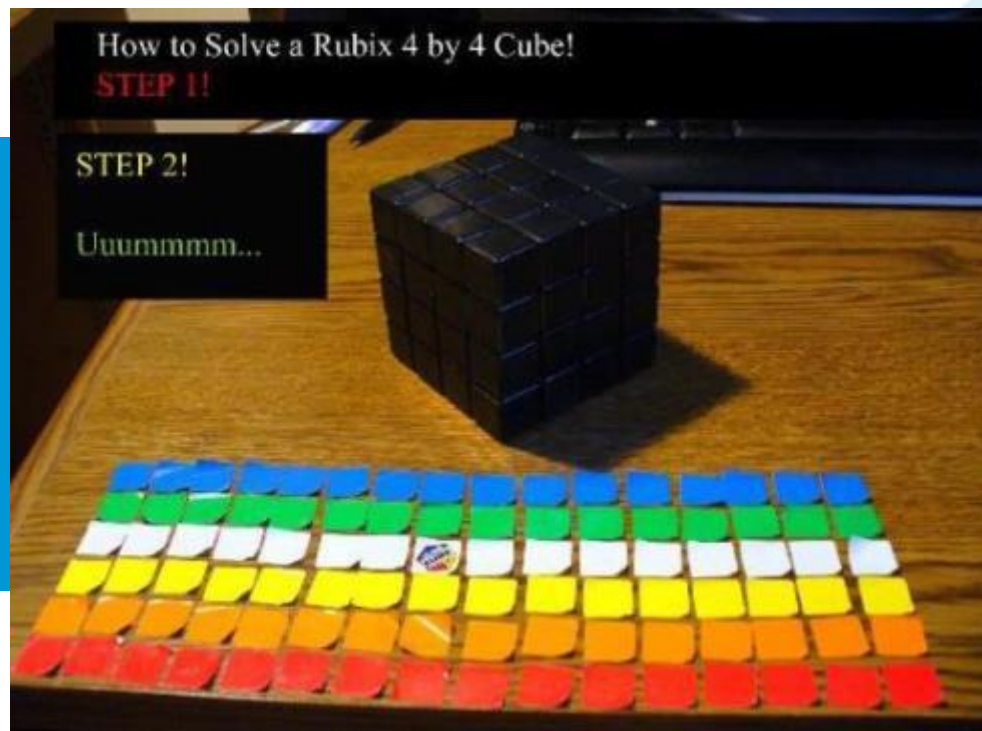
TOOLS NEEDED TO MAKE THE UNKNOWN KNOWN

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



THANKS FOR YOUR ATTENTION!



SKO

TV PANEL

nathalie.sonck@kijkonderzoek.nl

Senior Research Manager

www.kijkonderzoek.nl

liesbeth.nekkers@gfk.com

Head of Media Measurement NL

www.gfk.com/nl