



## Will it Blend?

Who is watching WEB-TV



Bas de Vos  
MD SKO



Frans Kok  
MD STIR



**Frans Kok**

**Me (with hair)**





## We could not stay together...

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**SKO** | Stichting  
KijkOnderzoek

The 2009 European Television Symposium

**IT'S THE END of TV**  
**AS WE KNOW IT**



**So today; we are back!**





## Today's topics

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- What is SKO
- What is STIR
- Project Setup
- Results
- The future



## Stichting KijkOnderzoek



**SKO**

- Television audience measurement in the Netherlands
- Joint Industry Committee (JIC)
  - Public broadcaster (NPO)
  - Commercial broadcasters (SPOT)
  - Advertisers (BVA)
  - Media agencies (PMA)





## TV audience measurement

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- Executing research agencies

### **INTOMART**

- Establishment survey, TV-panel, viewing data

### **mediaXim**

- Registration and classification of broadcasts

### **NEDSTAT**

- Measurement of WEB-TV

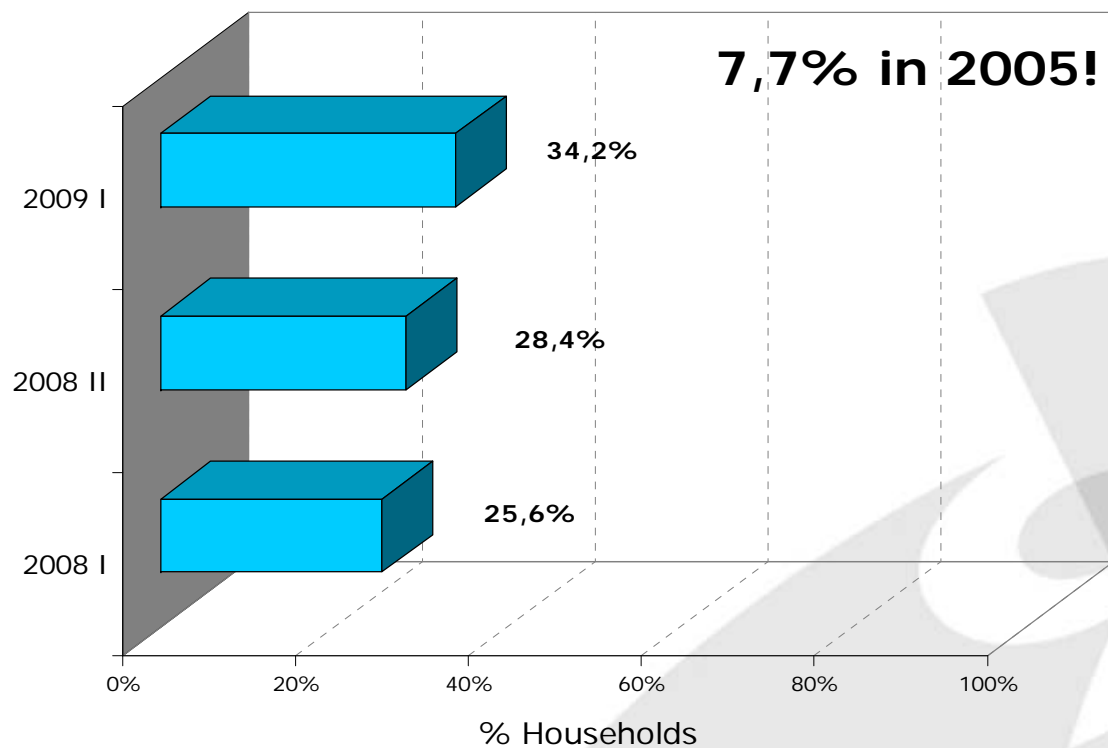
**ratings**

**streams**



## Web TV

**Watches TV-programme's through the internet**  
Source: SKO ES 1st half year 2008-2009





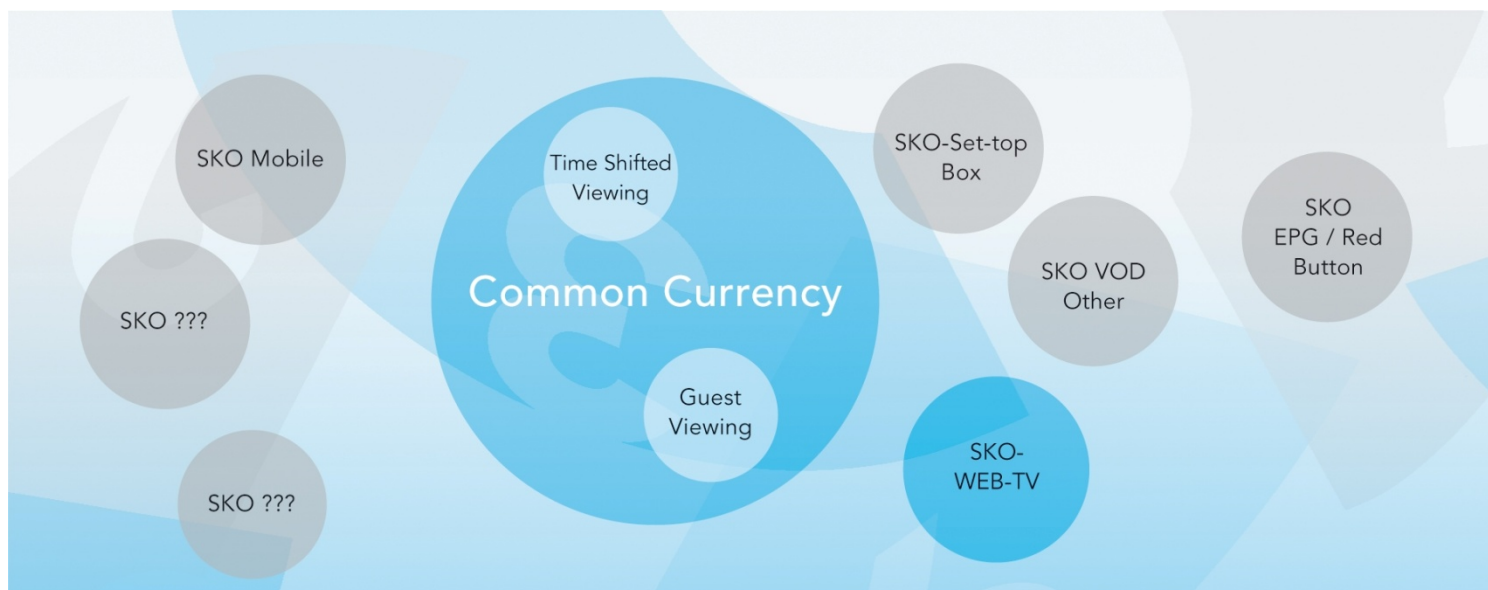
## SKO WEB-TV

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- Internet is not taking over everything
- But has great impact on distribution
- It is a complementary way of distributing TV content
- And it learns digital TV interfaces useful things



## SKO satellite strategy





## SKO WEB-TV

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- What is WEB-TV?
- Who is watching TV through the internet?
- Why do we want to know?



## Why do we want to know?

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- It is relevant for TV-TV
- Monitoring trends in WEB-TV consumption
- Do not wait, anticipate and go with the market changes



## What is WEB-TV?

Online stream

1. Live and parallel to TV broadcasts
2. Live and online-only
3. Programmes previously broadcast on TV
4. Micro chunks of programmes previously broadcast on TV
5. Extra programme-related material, online-only

**Daily report**

**Future:  
concept  
report**



## Logical issue: match TV stream – TV programme

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### Matching identifiers

- Programme title
- Programme identifier
- Date of broadcast
- Channel code
- Type of broadcast
- Start time of the programme



## Project set-up



Number of requests

Matching stream  
broadcast info



File including ratings

Program report:  
requests and number of viewers

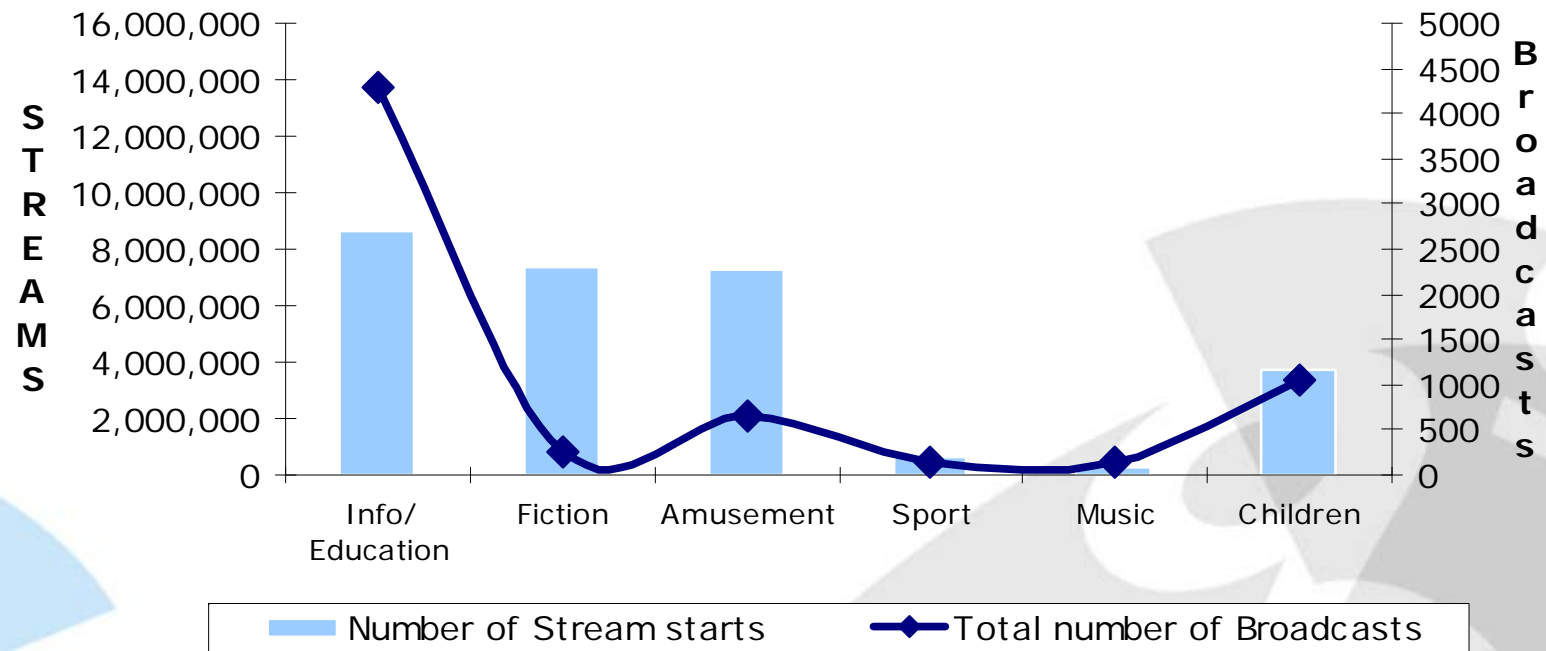


[www.kijkonderzoek.nl](http://www.kijkonderzoek.nl)



## WEB-TV : streams and broadcasts Q1 09

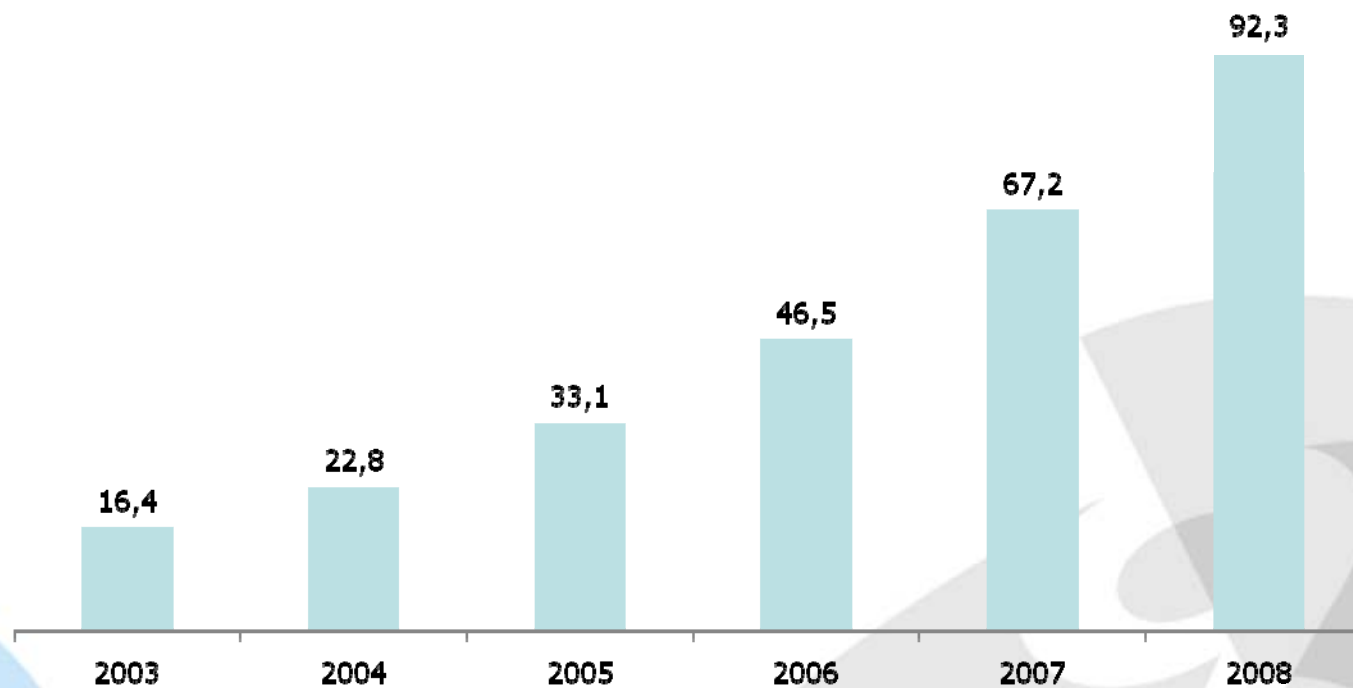
Number of streams starts and broadcasts WEB-TV, streamstarts within 7 days,  
NPO + RTL, Q1 2009





## More than 90 million adults viewers in Europe

### Monthly WEB-based video audience (in millions)

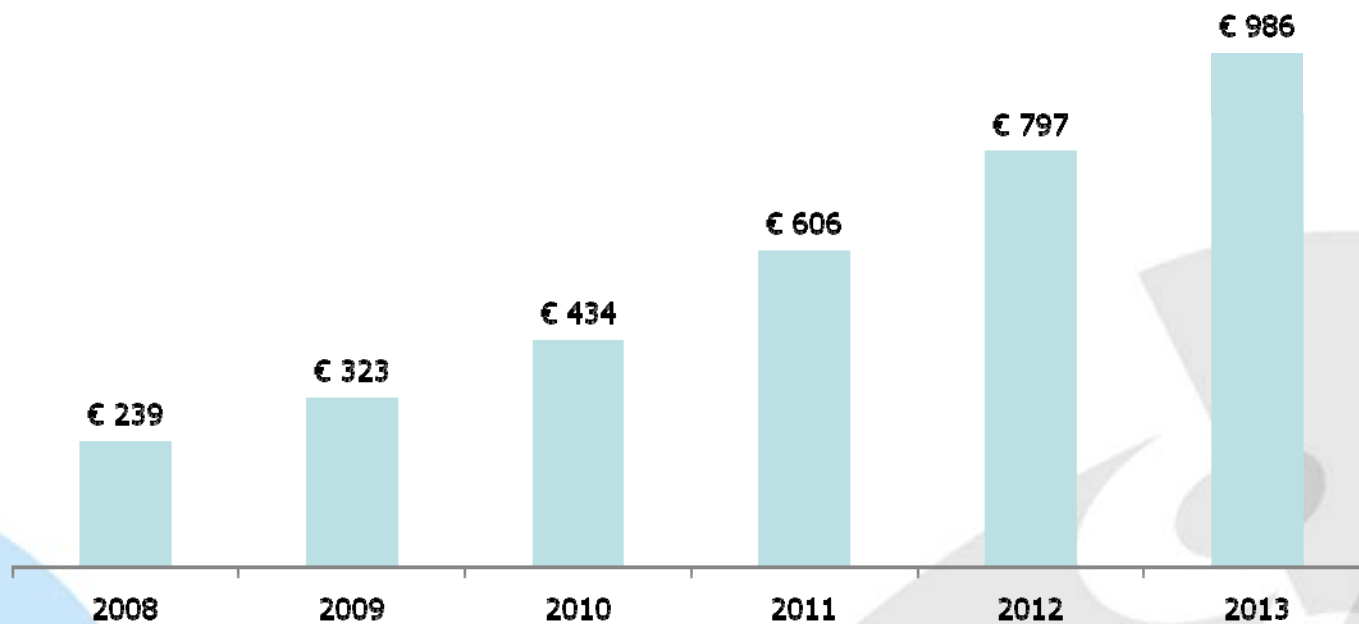


Base: Western Europe Adults  
Source: Forrester Research, Inc



## European online video ad spending

**Millions of euros spent on online video advertising**



Base: Western Europe

Source: Forrester Research, Inc



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**STIR**



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**STIR**



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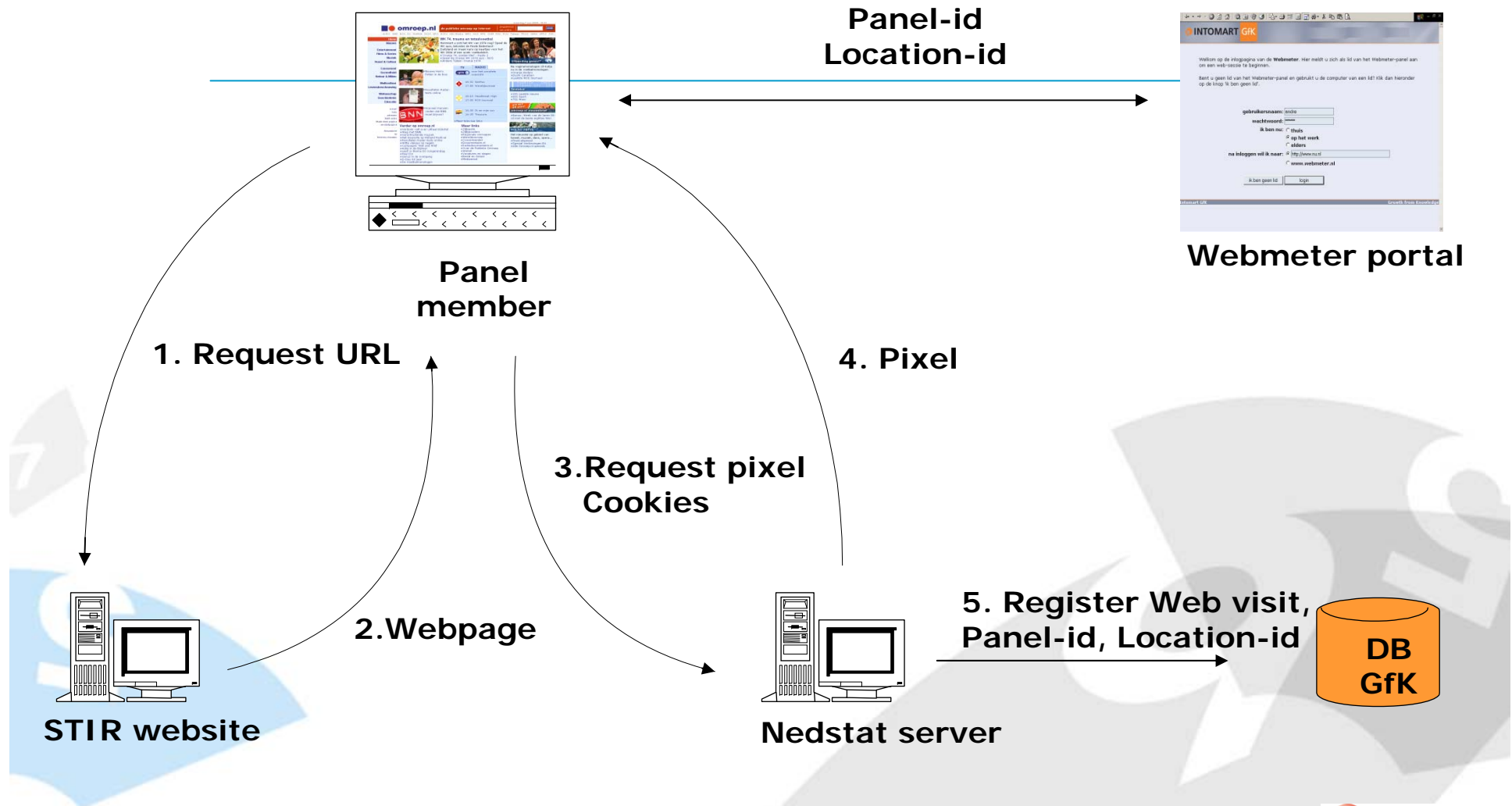
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# Webmeter™





## Webmeter technology for STIR





## STIR Webmeter panel in the Netherlands



10,000 panel members  
450 measured websites, 87% monthly reach.



## Crossing the borders

- Content is crossing all media
- Measuring one media type is a methodical challenge in itself
- People use all media
- Advertisers need integrated data across all media
- Content owners want to report on content exposure
- Media silos want new data incorporated into their “own” survey

*Question: Who “owns” the Internet?*



**You**Tube

**hulu**

**YAHOO!** SPORT





## Measurement of TV streams

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- Satellite projects for SKO (Nedstat's Stream Sense)
  - Classification and monitoring of TV streams (Web-TV)
  - Match streams data to correct TV programme
  - Report streams viewing alongside the TV currency data
- First stage success: transparency and playing field

*Question: Who "owns" Web-TV?*



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*Question: Who "owns" Web-TV?*



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## Will it blend?

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## Reach of WEB-TV and Audience profiles

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- Can we analyse reach and profiles based on the Webmeter panel of 10.000 members?
- 3 steps for data matching (*blending*):
  1. Surf data from STIR Webmeter panellists in the period Jan-March 2009 (including background data)
  2. Collecting the panellist data in the SKO Streamsense measurement by NPO and RTL channels-sites
  3. Matching of streams and TV broadcasts from the SKO-TV database



## Reach of WEB-TV and Audience profiles

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## WEB-TV in STIR-panel

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- Exclusive cooperation between SKO and STIR to assess WEB-TV profiles
- How could this be reported in a sensible way?
  - (Aggregation of) television programmes
  - Channel report
  - Reporting period



## First results

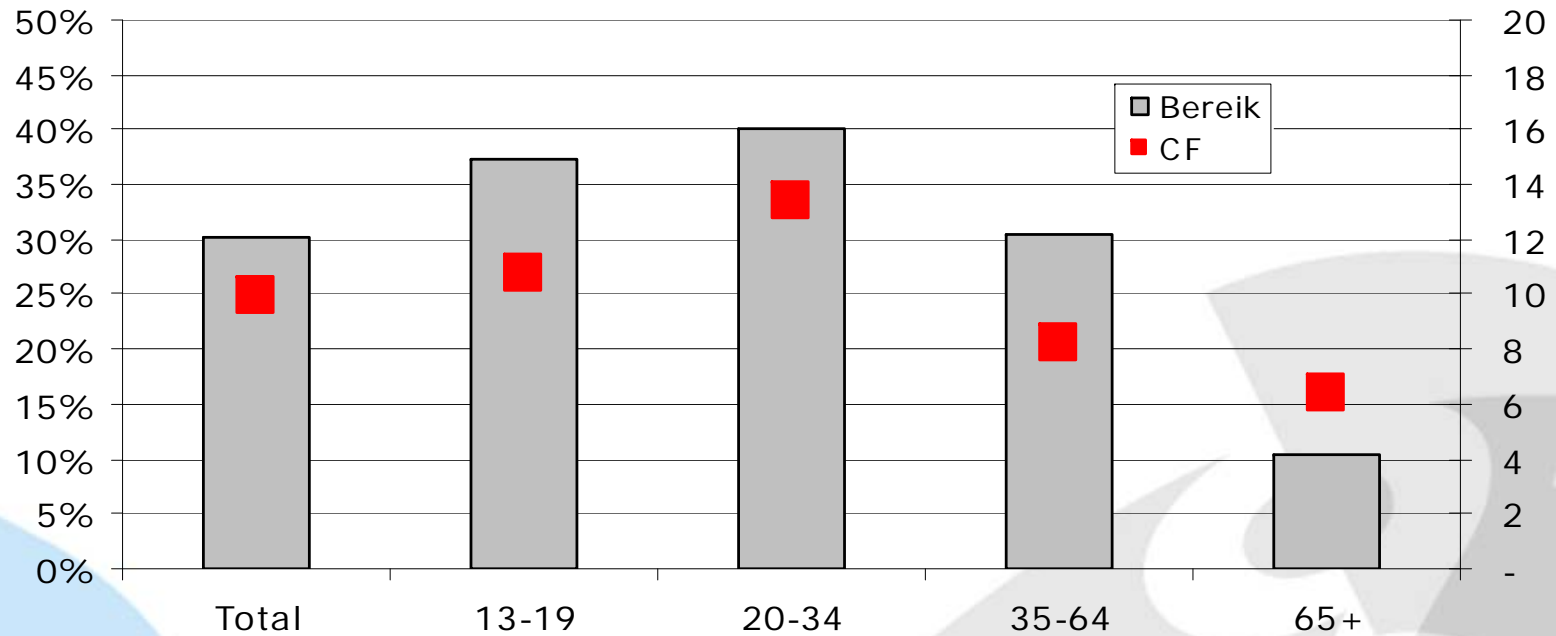
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- An ASI symposium exclusive!
- Not-yet published reports
  - Reporting period: Q1 2009
  - Reach: minimum criteria = stream started
  - Viewed within 7 days (SKO TSV norm = day of broadcast and 6 consecutive days )
  - By target group
  - At programme (title) level
  - By genre



## Target Groups Results Q1 2009 reach WEB-TV

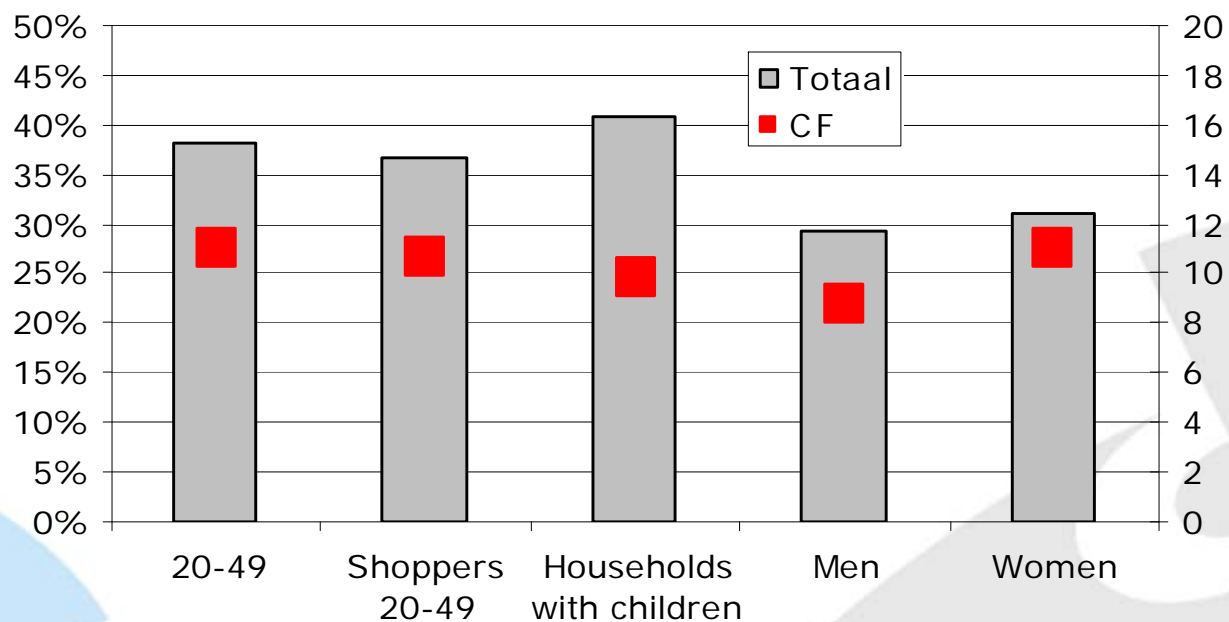
Total reach and average contact frequency WEB-TV, streamstarts  
within 7 days, NPO + RTL, Q1 2009





## Target Groups Results Q1 2009 reach WEB-TV

Total reach and average contact frequency WEB-TV,  
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## First results: definitions

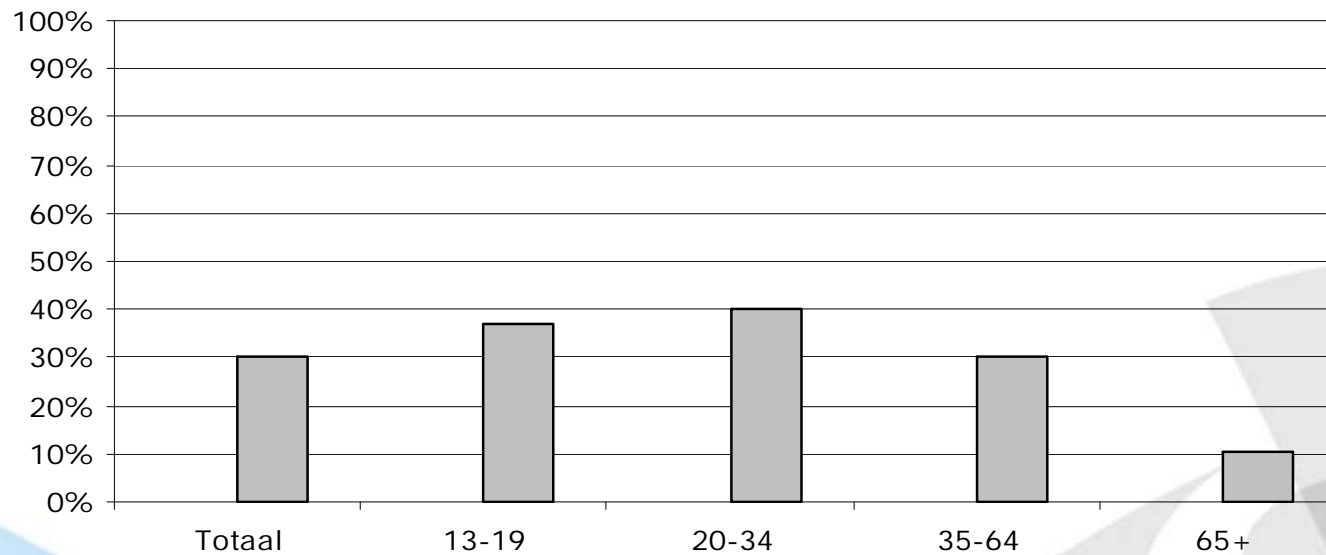
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- TV-TV
  - WEB-TV
  - TSV-TV
  - TSV-TV (same titles)
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- Note that the WEB results only cover WEB-TV titles. Not all online video!



## Target Groups Reach WEB-TV

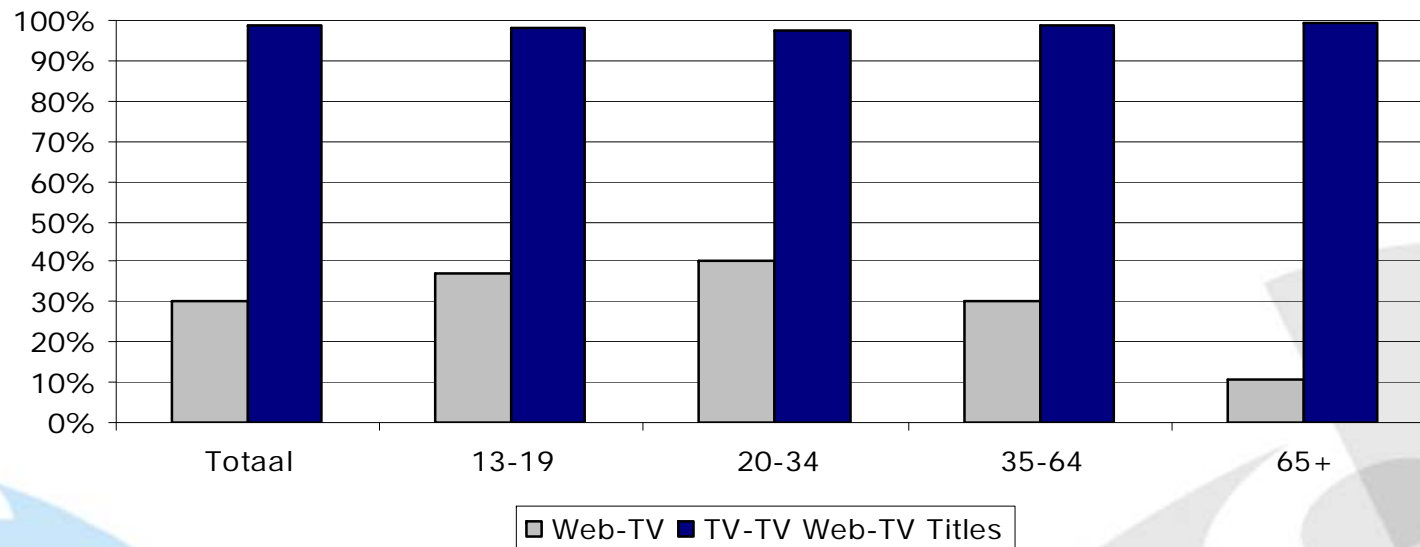
Total reach WEB-TV, streamstarts within 7 days, NPO + RTL, Q1 2009  
Total reach TV-TV, TOTAL VIEWING, TITLES WEB-TV NPO + RTL, Q1 2009





## Target Groups Reach WEB-TV and TV-TV (WEB-TV titles)

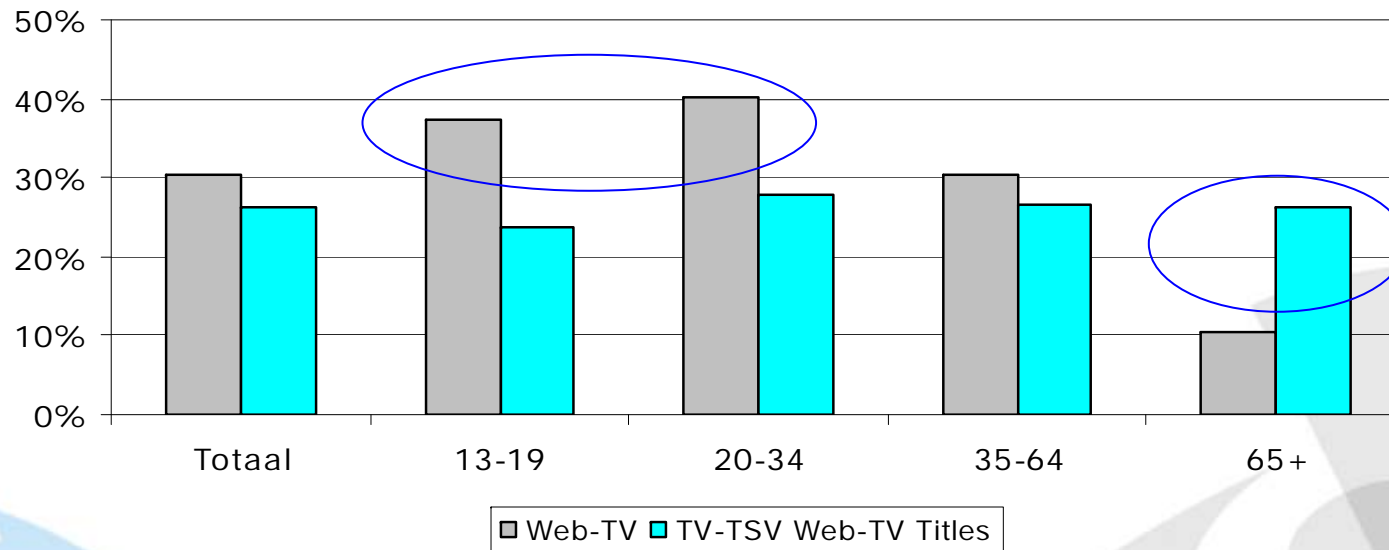
Total reach WEB-TV, stream starts within 7 days, NPO + RTL, Q1 2009  
Total reach TV-Total Viewing, WEB-TV Titles NPO + RTL, Q1 2009





## Target Groups Reach WEB-TV and TSV-TV (WEB-TV titles)

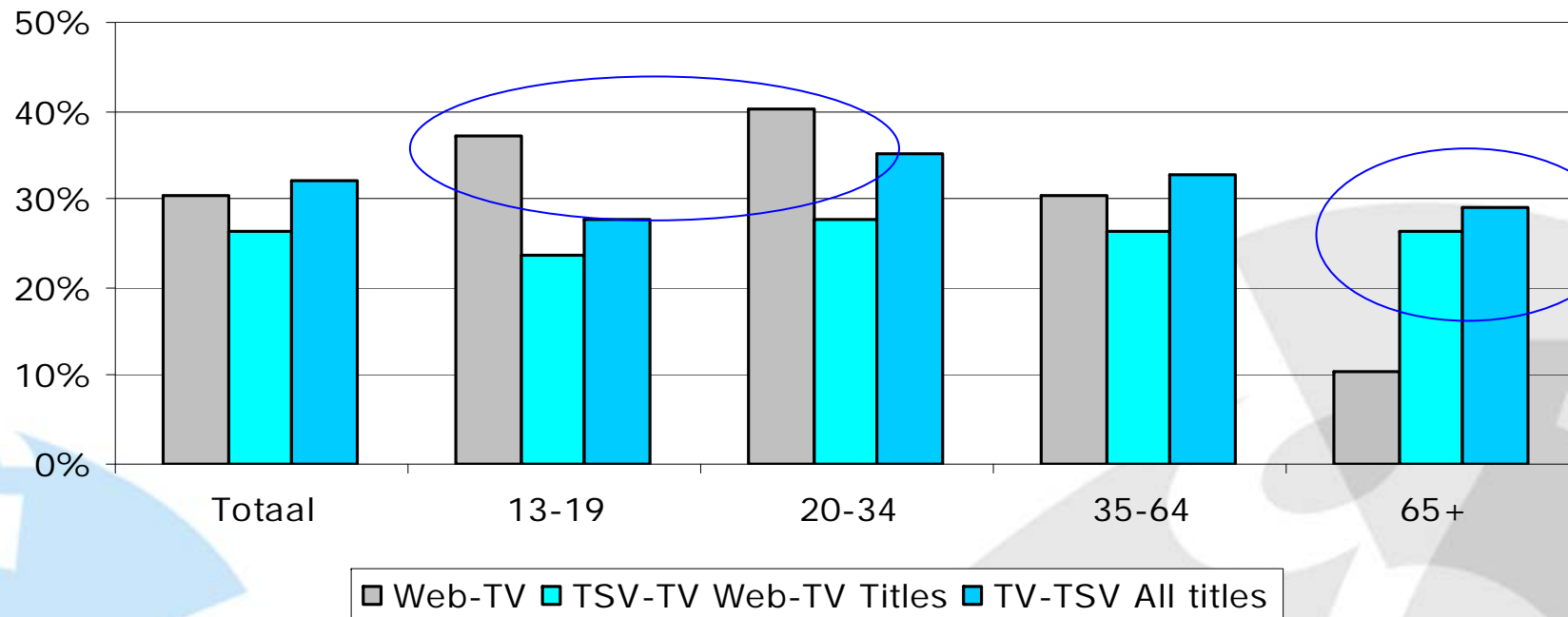
Total reach WEB-TV, streamstarts within 7 days, NPO + RTL, Q1 2009  
Total reach TSV-TV, WEB-TV Titles NPO + RTL, Q1 2009





## Target Groups Reach WEB-TV, TSV-TV (WEB-TV titles) and TSV-TV (All titles)

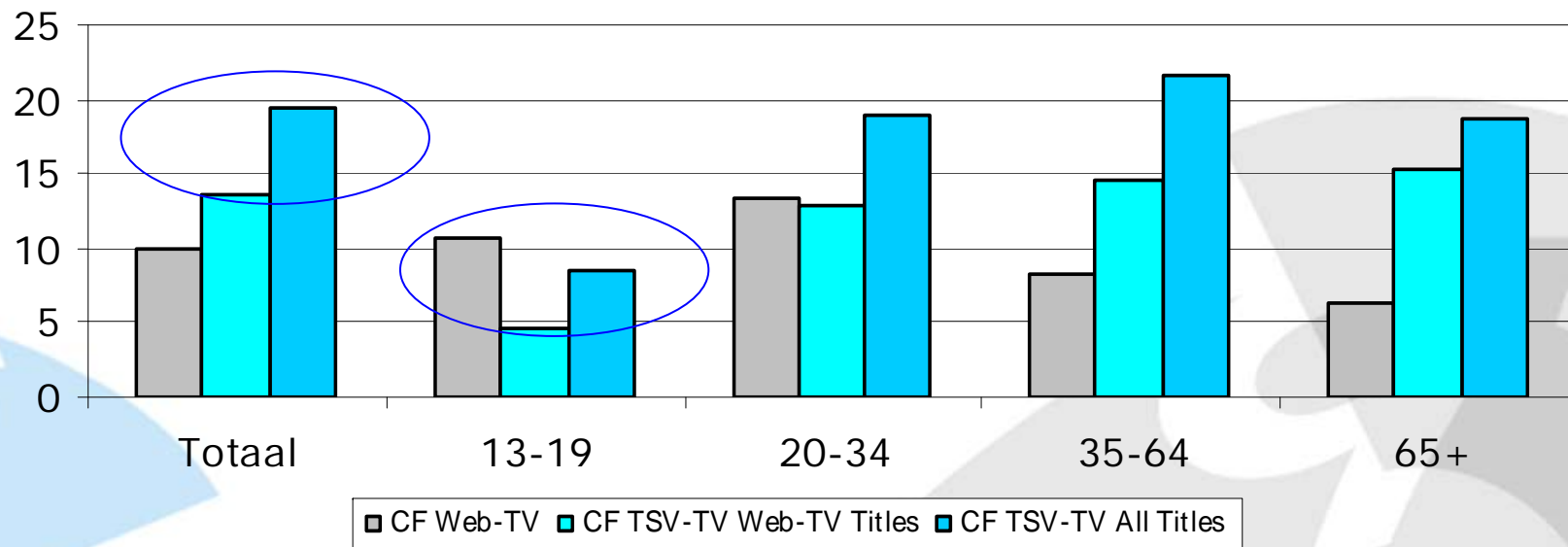
Total reach WEB-TV, stream starts within 7 days, NPO + RTL, Q1 2009  
Total reach TSV-TV, WEB-TV Titles and All titles NPO + RTL, Q1 2009





## Target Groups Avg. Frequency WEB-TV, TSV-TV (WEB-TV titles) and TSV-TV (All titles)

Avg. frequency WEB-TV, TSV-TV, WEB-TV Titles and All titles NPO  
+ RTL, Q1 2009





## First results WEB-TV reach by target group

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Non-surprising:

- Total reach WEB-TV around 30%
- Young people watch more WEB-TV
- % Reach strongly decreases with age
- TV-TV is (of course) still by far the biggest.



## First results WEB-TV reach by target group

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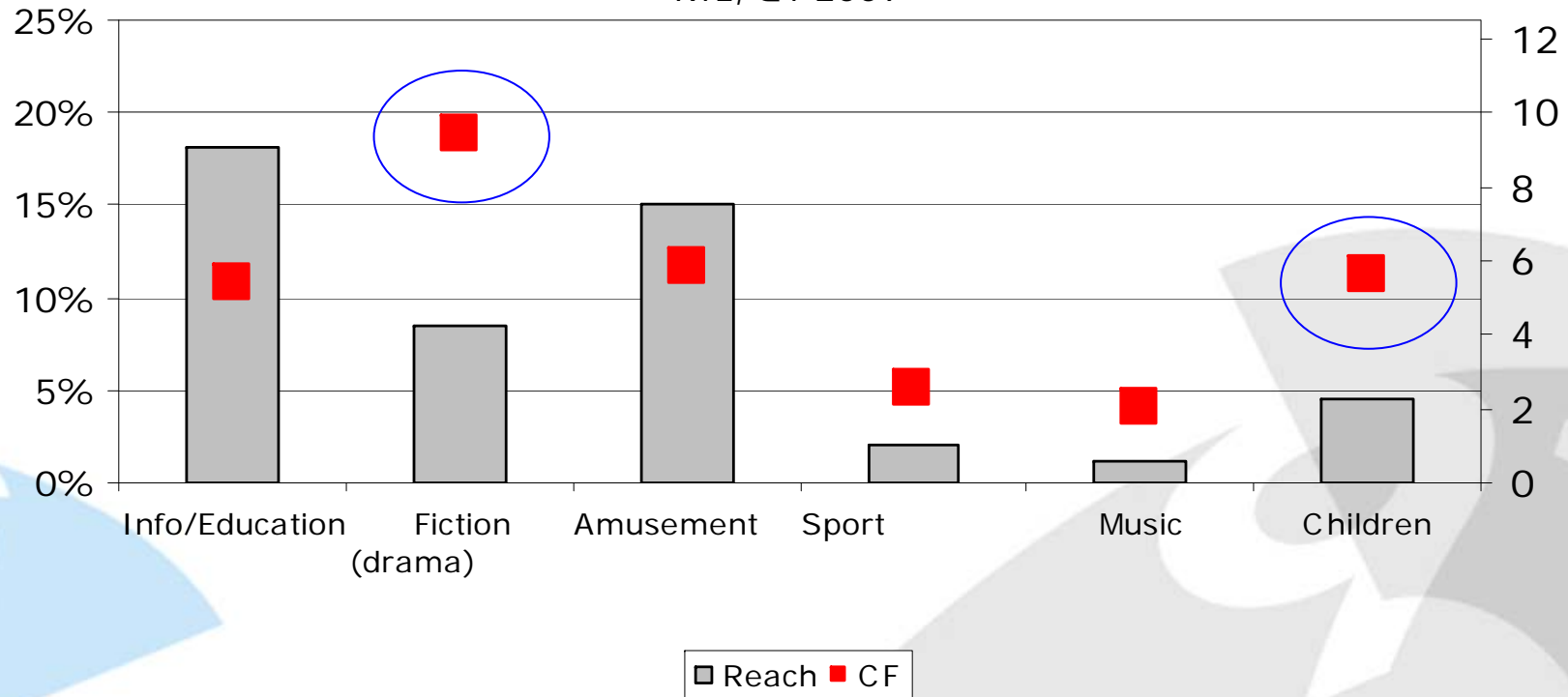
Real results:

- WEB-TV compared with TSV-TV is really similar!!! In terms of reach.
  - Viewing time not yet accounted for
  - Broadband = 70%
  - PVR = 20%
  - So still things to come



## Genre Results Q1 2009 reach WEB-TV

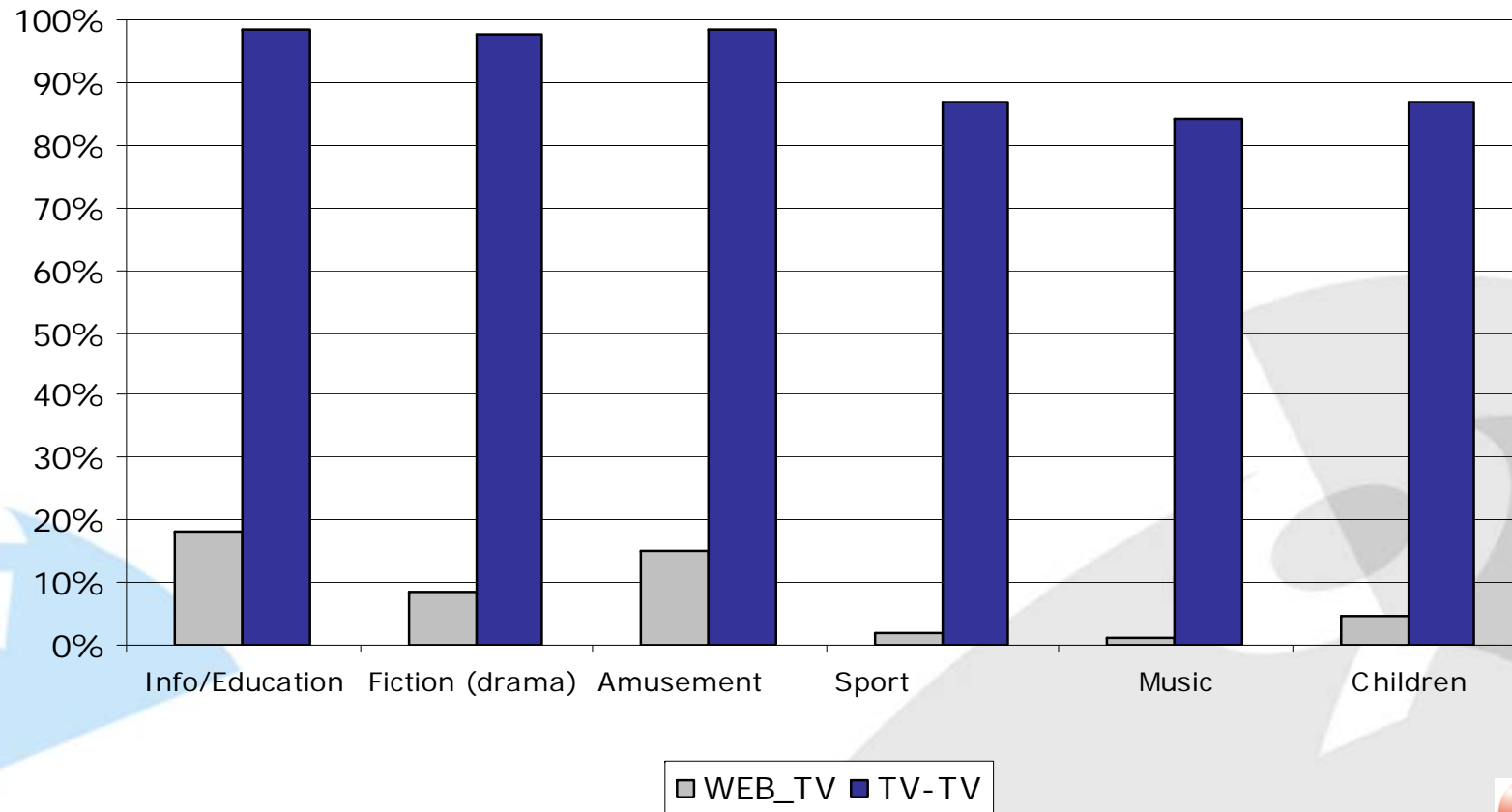
Reach and average contact frequency WEB-TV, 13+ by genre, NPO +  
RTL, Q1 2009





## Genre Results Q1 2009 reach TV-TV (WEB-TV titles)

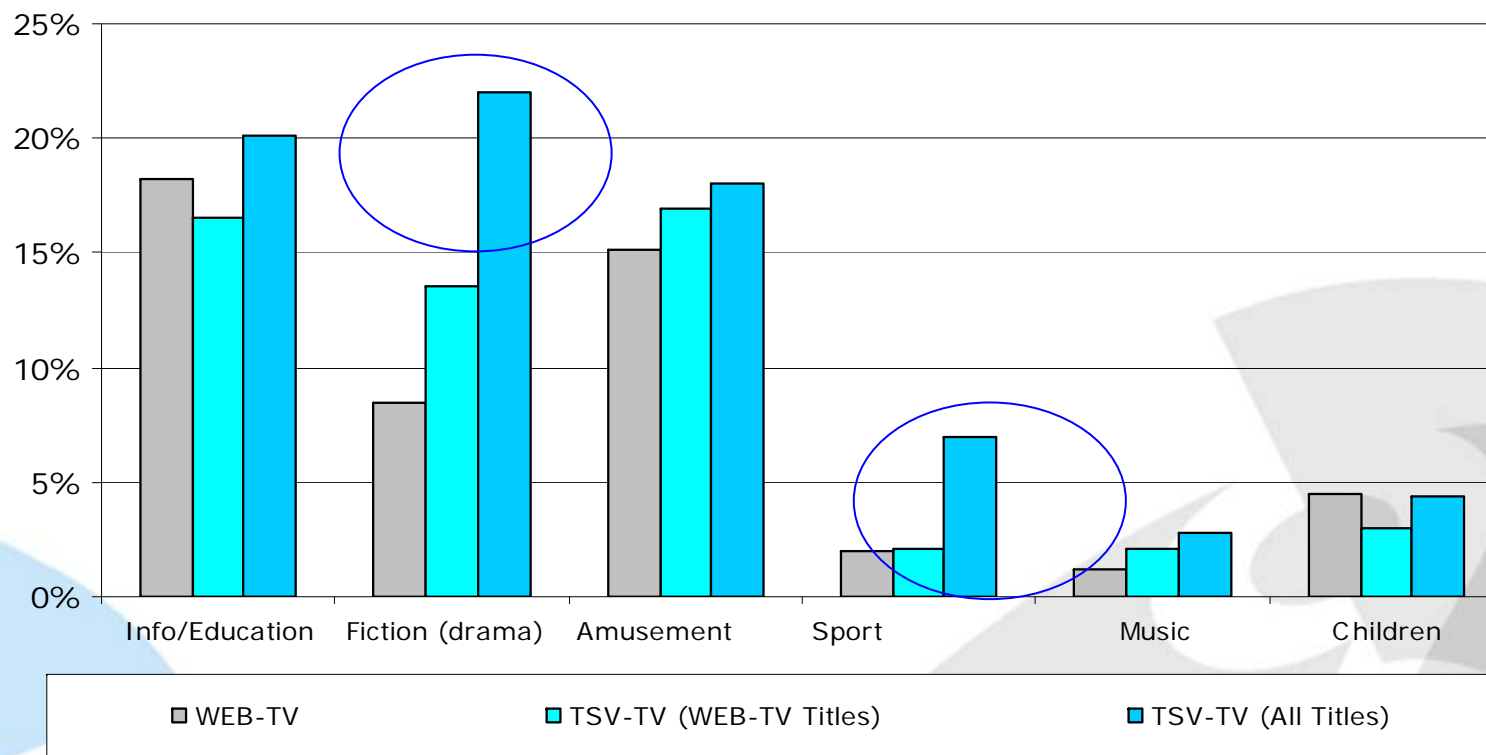
Reach a WEB-TV and TV-Total Viewing (WEB-TV Titles), 13+ by genre, NPO + RTL  
Q1 2009





## Genre Results Q1 2009 reach WEB-TV and TSV-TV (WEB-TV titles)

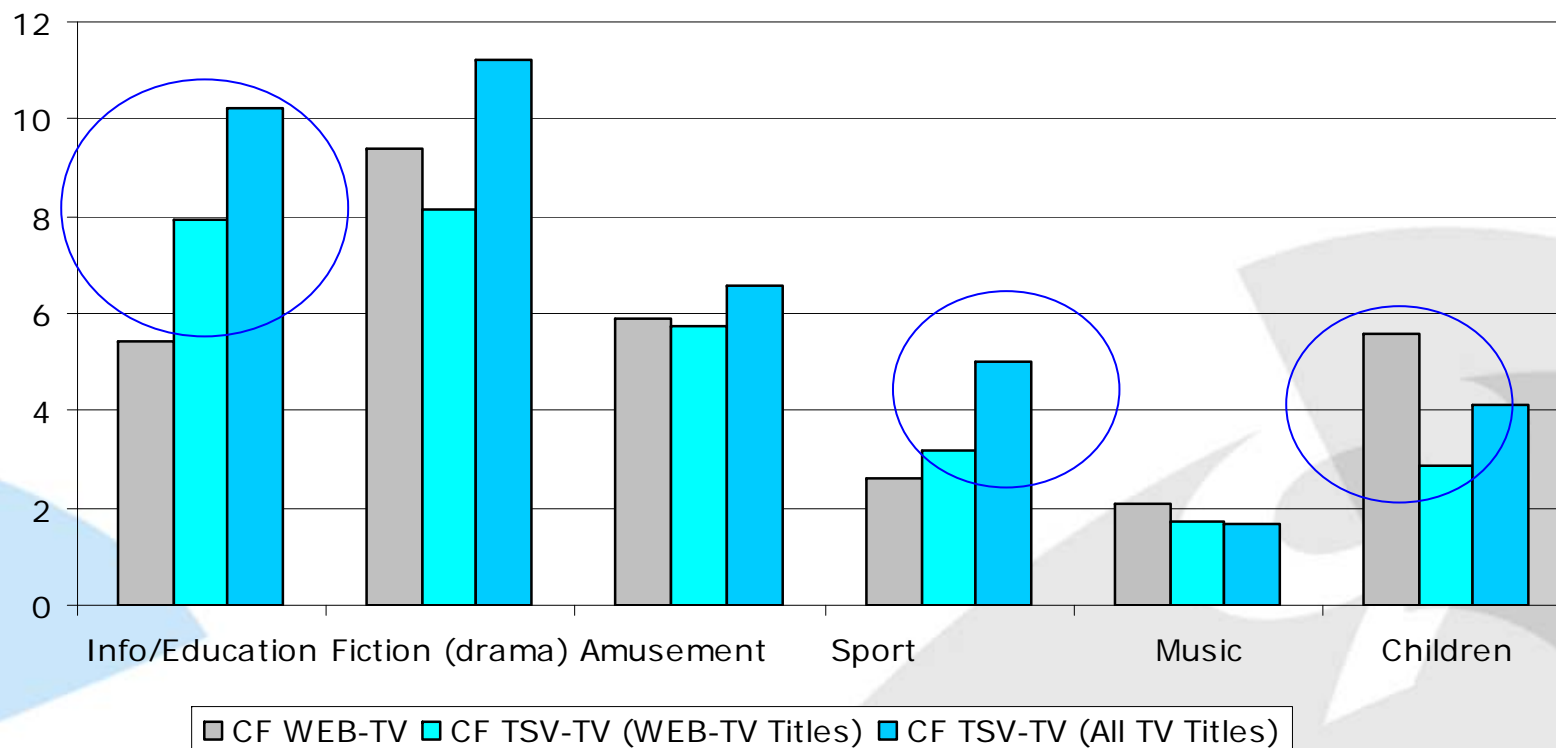
Reach WEB-TV and TSV-TV (Web-TV titles),  
13+ by genre, NPO +RTL, Q1 2009





## Genre Results Q1 2009 Avg. Freq. WEB-TV and TSV-TV

Avg. frequency WEB-TV, TSV-TV, WEB-TV Titles and All titles NPO + RTL, Q1 2009





## First results WEB-TV by Genre

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Real results:

- Reach and above all frequency are bigger in TSV-TV than in WEB-TV.
- But there is more overlap in TSV-TV than in WEB-TV so reach is comparable.
- Fiction and Sports as genre are less dominant in WEB-TV than in TSV-TV.
  - Less (foreign) fiction and sports content on WEB-TV due to rights



## Concluding remarks

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- For the first time we can take a look at reach and profiles in online consumption of TV-content
  - Reach comparable overall, but big differences in target groups and per genre
  - WEB-TV offer is different than PVR recordings of TV-TV programmes what leads to other usage.



## Concluding remarks

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- Results can be broken down per channel and genre
  - But even a panel of 10.000 is relative small for the reporting on individual broadcasts.
- It is now possible to compare use of TV-TV, TSV-TV and WEB-TV.
  - Now we are able to monitor developments and start thinking in how to cope in the next couple of years.
- Unique new insights thanks to combining useful data from different projects!



## Next steps

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- Can we measure play duration?
- Can we measure streamspots/campaigns?
- What are the minimum thresholds to report?
- Can we report online-only content?



## Conclusion: Just blend it

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Be good in your Silo!  
But do not hesitate to blend a bit if it is useful.

Just Blend it!





Shouldn't we (Dutch) conclude that measurement of WEB-TV is as important as measuring TSV in TAM?



**SKO**

Stichting  
KijkOnderzoek

Thank you for your attention!

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