

# CATCHING UP WITH WEB-TV

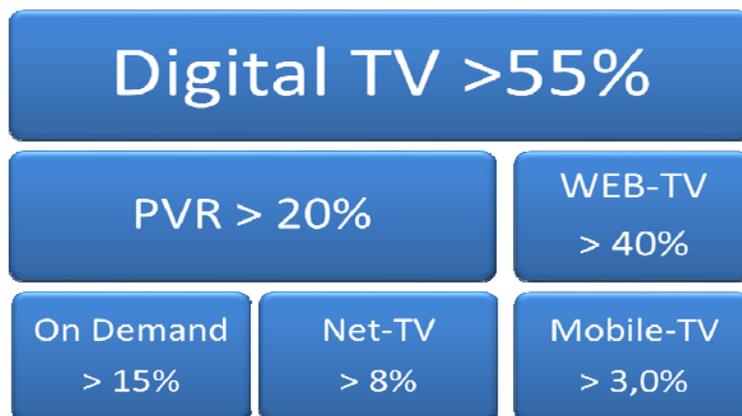
## AN ANALYSIS OF NON-LINEAR VIEWING ON THE TV AND THE INTERNET

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### OVERVIEW

ESOMAR raised the question of how the audience measurement industry is responding to new, hybrid and cross-over media platforms and consumption moments. In The Netherlands, development of television content viewing platforms has seen rapid development. Since 2005, digital TV penetration has been growing. Cable TV is still the dominant platform for digital reception, but digital terrestrial TV has, in the last two years, shown a definite increase in popularity. The growing penetration of digital television has brought along an increasing number of channels and catch-up/on-demand services. The percentage of households using such services through the set top box has increased from 7% in 2008 to 10% in 2009. Online TV content, mostly offered through catch up services of broadcasters, is viewed in 40% of the Dutch households. While Mobile TV is only used in 3% of the households, the NET-TV phenomenon (a.k.a. Connected TV) is on the rise. (See figure 1.)

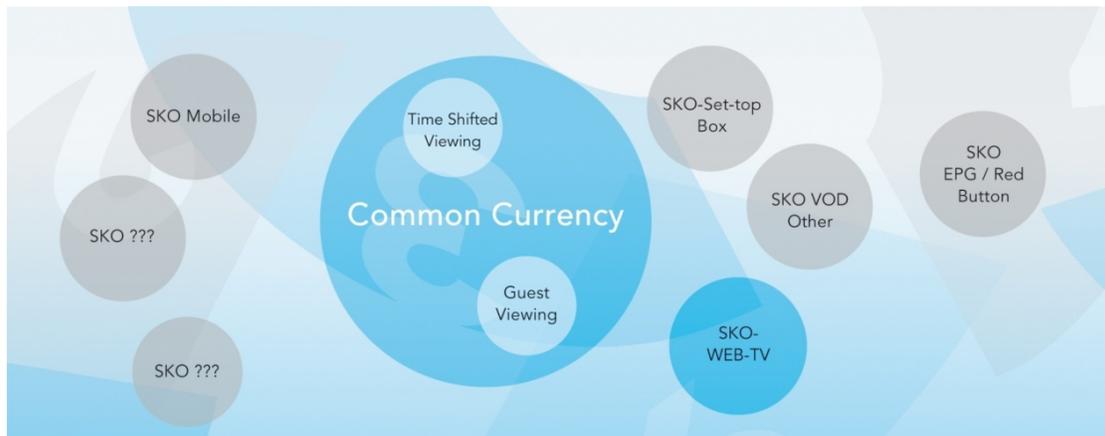
**FIGURE 1**  
**CHANGING TV WORLD**



PART 3 / MIGRATION OF TRADITIONAL TO DIGITAL?

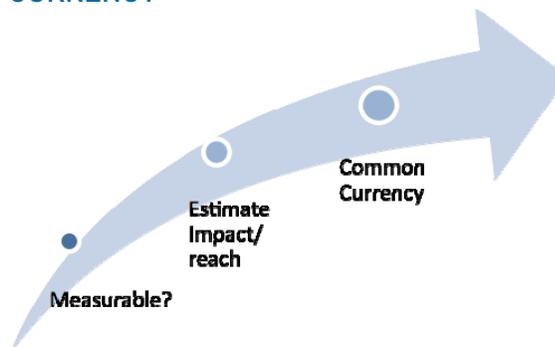
But there are a lot of potentially new audiences that can still not be measured in a traditional TAM measurement scheme. Accordingly, a lot of new initiatives for TV viewing measurement have sprung up in the last few years. To take these new types of audience behavior into account, SKO has developed a Satellite Strategy (see figure 2). The core business is still represented by the common currency; SKO provides daily ratings and program rating evaluations - including time shifted viewing and guest viewing.

**FIGURE 2**  
**SKO SATELLITE STRATEGY**



As you can see, there are a number of television content viewing platforms that are located outside of the common currency. This does not, however, mean that these platforms - or 'satellites' - are ignored. We regard each platform as a separate research project, enabling us to develop platform-specific measurement strategies and to investigate platform-specific viewing behaviour. In the process, we avoid undue influence on the common currency results. The latter is important, as the level of measurement may as yet not meet the standards set by the common currency measurement. Furthermore, the issue of whether or not the individual types of viewing should be regarded as TV viewing may not have been resolved yet. In this way, then, we can investigate without causing any political or commercial issues. Once we are able to measure and estimate the reach of each new phenomenon, we can then discuss if and how the new platform and the related viewing behaviour should be incorporated in the common currency. (See figure 3.)

**FIGURE 3**  
**FROM SATELLITE TO COMMON CURRENCY**



## PART 3 / MIGRATION OF TRADITIONAL TO DIGITAL?

The most striking trend in television viewing in The Netherlands the last years is time shifted viewing - both through the TV set and as WEB-TV. As a matter of course, time shifted viewing became part of the ratings measurement in 2008. Time shifted viewing through TV is already part of the common currency; WEB-TV is currently still treated as a satellite (see figure 3).

In this paper we will describe the measurement and most interesting trends in the use of time shifted TV through a TV set and through the web.

The next section describes the measurement of both ways of non-linear viewing of television content. It serves as a short introduction to the results described in the subsequent section. Next, we compare both ways of non linear TV viewing, with WEB-TV data obtained in a joint project of the Dutch TAM and the Internet audience measurement service. Finally, we sum up the conclusions of the trend analyses.

### MEASUREMENT

#### Measurement of time shifted viewing

In April 2007, a new measurement technique - Enhanced Audio Matching (EAM) -was introduced in the Dutch TAM. This technique is necessary to reduce the increasing amount of unidentifiable viewing in these households and to measure time shifted viewing through set top boxes and digital recorders (PVR). The detailed setup was presented at the ESOMAR WM3 Conference of 2007 (De Vos and Appel, 2007).

EAM is an audio-based technique that functions similar to Picture Matching (PM). Just like PM, EAM is an independent technique that is able to operate without the participation of the channels. The research company is responsible for audio data referencing and measurement continuity. EAM allows non-invasive installation in homes where normal installation is not possible or not allowed by the panel member.

By introducing the EAM technique in the TAM, we are now able to measure the viewing behavior of panel members who use their PVR or DVD-recorder to watch recorded television content at a later point in the week. In addition, the viewing of VOD previously broadcasted in the same week can now be measured. Before EAM, we had already seen a growth in usage of stored content, but were unable to specify what was being watched. We could not do more than report HD/DVD watching. Now that we are able to specify what is being watched, we can incorporate this 'new viewing' in our ratings.

In the Netherlands, the SKO board had already agreed in 2006 that the currency we call rating or GRP should become an integrated/consolidated figure that includes time shift viewing on the day of broadcast, and the six consecutive days. We decided to use a period consisting of seven days in total for practical reasons (storage, etc.), but also because most TV schedules loop on a weekly basis.

#### Measurement of WEB-TV

SKO WEB-TV is an innovative measurement that started back in 2007, when the Dutch JIC set up the playing field and the measurement of online streams. The challenge consisted in creating a classification of broadcast TV-content offered online and using a new server-based pixel technique, in order to capture the number of streams accessed through online players. We presented the setup and first results at the ESOMAR WM3 2008 Conference (Irazoqui, De Vos, Bok and Verhulst, 2008).

## PART 3 / MIGRATION OF TRADITIONAL TO DIGITAL?

One of the first topics of discussion was the method to count requested streams. As audience researchers, our initial preference was for panel-based research, conducted parallel to or, possibly, within the current TV audience research panel. Using all or part of the current TV panel was not an option for SKO, because we believed it would be too intrusive for the panel members. Moreover, with 2,900 members, the TV panel was possibly too small to provide a sufficient number of individual stream requests.

Because of this, we chose to use another means of measuring online television viewing: server-based pixel measurement. In the spring of 2007, SKO selected Nedstat to take on the research project, together with Intomart GfK and Mediaxim. To measure video streams, Nedstat's Stream Sense module was implemented on the players of all the websites of all SKO member stations. Stations and broadcasters worked throughout 2007 to harmonize naming conventions in streams playing TV-content, in order to match market standard programme titles as reported by SKO. This was a necessary step in order to link streams to specific broadcasts.

Intomart GfK delivers the key for combining the streaming data provided by Nedstat and the programme information provided by MediaXim in our daily operation. Intomart GfK is experienced in combining information from multiple surveys, including the appreciation panel surveys for NPO, BBC and other clients. To ensure comparability, it was necessary to agree on a definition of the subject of measurement: the content of on demand streams. To deal with the issues of overlap between programs (previously) broadcasted on television and online content included in the overall programme concept, the technical committee chose the following reporting solution.

We distinguish five different types of 'TV content' to be considered for reporting:

- 1) Integral live streams, online and parallel to TV broadcasts;
- 2) Online-only live streams;
- 3) Streams of TV programmes previously broadcast on television;
- 4) Streams containing segments of programmes previously broadcast on television;
- 5) Streams containing extra programme-related material only available online, such as extra auditions for "Idols".

The process flow is as follows:

- Broadcasters (participating channels are those of Dutch Public Broadcaster NPO, RTL Nederland and SBS Broadcasting) label their streams, including the appropriate stream recognition codes.
- Nedstat measures the number of stream starts.
- Intomart GfK obtains the correct broadcast information from the MediaXim database.
- Then broadcasters check the TV programmes matched streams and correct titles of non-matched streams.
- Using a fixed format, Intomart GfK then combines the streaming information with the regular TV ratings for each stream.
- The percentage of non-matches is checked by Intomart GfK to prevent reporting on too small a basis.

Results are made available at the SKO website [www.kijkonderzoek.nl](http://www.kijkonderzoek.nl).

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FIGURE 4  
DAILY SKO WEB-TV REPORT

Dag top 10 Web TV					donderdag 25 maart 2010		
vr 19 mrt   za 20 mrt   zo 21 mrt   ma 22 mrt   di 23 mrt   wo 24 mrt   do 25 mrt					SKO Web TV**	KijkTotaal*** KijkOnderzoek	
pos	tijd	titel	zender	genre	nStreams	TOT 6+	
						kdh%	abs
1	2034	WIE IS DE MOL	Ned1	amusement	304.192	10.3	1.558.000
2	2000	GOEDE TIJDEN SLECHTE TIJDEN	RTL4	fictie (drama)	176.262	8.4	1.275.000
3	2132	BLOEDVERWANTEN	Ned1	fictie (drama)	60.555	7.0	1.061.000
4	1859	ONM	Ned3	fictie (drama)	53.472	2.3	348.000
5	2227	OVER MIJN LIJK	Ned1	informatie/educatie	50.435	5.3	810.000
6	1812	SPANGAS	Ned3	kinderen (0 t/m 12 jaar)	47.343	1.6	235.000
7	2214	AS THE WORLD TURNS	RTL8	fictie (drama)	30.238	0.9	140.000
8	2133	ZESDE ZINTUIG	RTL4	informatie/educatie	25.703	6.0	915.000
9	1959	TAKE ME OUT	RTL5	amusement	25.285	1.7	265.000
10	2100	NIEUWSLICHT	Ned3	informatie/educatie	20.560	0.9	138.000
Bron: SKO KijkOnderzoek					Bron: SKO Web TV onderzoek	Bron: SKO KijkOnderzoek	

Two years after the reporting kick off, the WEB-TV research is already a fully established source for multi-media evaluation of programme performance: reports are being produced on a daily basis and planners are using a tailor-made tool for the analysis of online performance of TV shows, within the seven days of broadcast and beyond (the long tail). (See figure 5.)

The main goals of the project are to provide a single, authoritative source for online TV audience figures and to produce comparable and useful results for broadcasters, media agencies and advertisers. A third goal is the application of the approved standards used in TV audience research to WEB-TV measurement, promoting integration between traditional television and online operations within the broadcaster's organization (see figure 6).