Mediapulse Streaming Data – Quarterly Report Q2/2021

Results of the expanded TV research by Mediapulse AG

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1. Introduction

With the enhancement of its TV measurement system, Mediapulse AG is pursuing the goal of providing the Swiss TV market with an independent, cross-platform and comparable database with which the consumption of television and other video offerings can be uniformly quantified and continuously monitored. This expanded measurement system has been in place since the beginning of 2021, with Kantar Switzerland playing a major role in its development and implementation. Initial results were published in April 2021 in the context of a Quarterly Report. The following Report on the second quarter of 2021 is a continuation of this publication.

This second Report, like the first, aims to quantify the distribution and consumption of relevant video and streaming platforms and to compare them with the corresponding performance data for TV consumption. In addition to this, the ongoing expansion of TV research has now made it possible for the first time to publish results on TV consumption not involving the classic TV set, which are included in the current Quarterly Report.

The second Quarterly Report on Mediapulse Streaming Data does not present the methodological principles used, as they are detailed in the first Quarterly Report as well as in the factsheet about the expansion of Mediapulse TV research. In response to feedback on the first Report and in the interest of comprehensibility, however, the following chapter again states clearly which media formats are covered under what limitations, and what performance metrics are involved.

2. Media categories and key parameters

The Mediapulse Streaming Data survey is based on the same framework that is currently used for TV research. This results in two important limitations:

- Firstly, the figures refer to the TV universe, i.e. they are representative of persons aged 3+ in private households with at least one operational TV set. This is true for a good 90 percent of all Swiss households.
- Secondly, existing TV research only captures television use within the home. This at-home focus was also adopted in the following for the reported consumption data of the non-TV offerings, i.e. their use outside the home is not considered.

Under these two current limitations, the Mediapulse streaming data maps the consumption of three different categories of media offerings:

- The first category includes the international video and streaming platforms and thus represents streaming data in the narrower sense. Currently, the five services most relevant to Switzerland are being surveyed: YouTube as the leading video platform, plus the streaming services Netflix, Disney+, Amazon Prime and AppleTV+. The consumption of these services on all suitable devices in the household is logged.
- The second category is the linear and time-shifted use of TV offerings on all TV sets in the household (TV@Big-Screen). This corresponds to the scope of current TV research, in which a measurement technology based on the audio matching method is used, enabling it to cover all TV distribution vectors (IPTV, cable, satellite, OTT).
- The third category is the linear and time-shifted use of TV offerings on small-screen devices, i.e. on PCs (desktop, laptop), tablets and smartphones (TV@Small-Screen). In the current state of the expansion of research, this category includes the most relevant web TV or OTT offerings for

Switzerland from blue, Quickline, Teleboy, UPC, Wilmaa and Zattoo. An extension of this category to include the proprietary offerings of the TV stations is planned for the next phase of expansion.

Figure 1 provides an overview of the three categories outlined here and highlights two further differences between the offerings:

- Firstly, it has only been possible since the beginning of May to survey TV consumption not involving an actual TV set. Accordingly, the following figures for this category do not represent the entire quarter, but only the months of May and June.
- Secondly, only the existing TV research is able to take the consumption measured and break it down by channel and programme. In the other two categories, only the consumption of the respective platforms is quantified. However, this distinction is irrelevant for the platform-level comparison that this report seeks to facilitate.

Figure 1: Overview of the measured categories

TV and Non-TV offerings / Big-Screen and Small-Screen

Categories	Description	Devices	Level	Period
TV@Big Screen	Linear and time-shifted consumption of TV channels on TV sets via IPTV, cable, satellite, OTT	TV sets	Channel	1 April – 30 June 2021
TV@Small Screen	Linear and time-shifted use of TV channels via blue TV Air, UPC, Quickline, Teleboy, Wilmaa and Zattoo on PC (desktop, laptop), tablet and smartphone	Small-screen devices / Mobile devices	Platform	1 May – 30 June 2021
YouTube **Netflix** **Disney+** **Amazon Prime** **Apple TV+**	Consumption of the platforms on TV set, PC (desktop, laptop), tablet and smartphone	All screens	Platform	1 April – 30 June 2021

In order to quantify the users and consumption of these broadcast categories and compare them with each other, the same three key parameters of TV research are used as in the first Quarterly Report. These are the Daily Reach averaged over the respective measurement period as a measure of the size of the audience and, secondly, the Viewing Time and Exposure Time as a measure of the scope of consumption. The basis of these two consumption indicators is the sum of all measured minutes of consumption, which are then averaged in two different ways: for Viewing Time, with respect to all persons in the universe and thus all potential consumers; in the case of Exposure Time, with respect to all persons who have consumed the respective offering and thus all actual consumers. Figure 2 provides an overview of the three variables.

Figure 2: Overview of the key parameters

Viewer and viewing information

Performance data	Description	Figures in …
Daily or net reach (NR)	Percentage of people within a target group who have consumed an offering at least once per day	percent
Exposure time (ET)	Average daily consumption time of all consumers of an offering on that day	minutes
Viewing time (VT)	Average daily duration of consumption by all persons in the population	minutes

3. Results

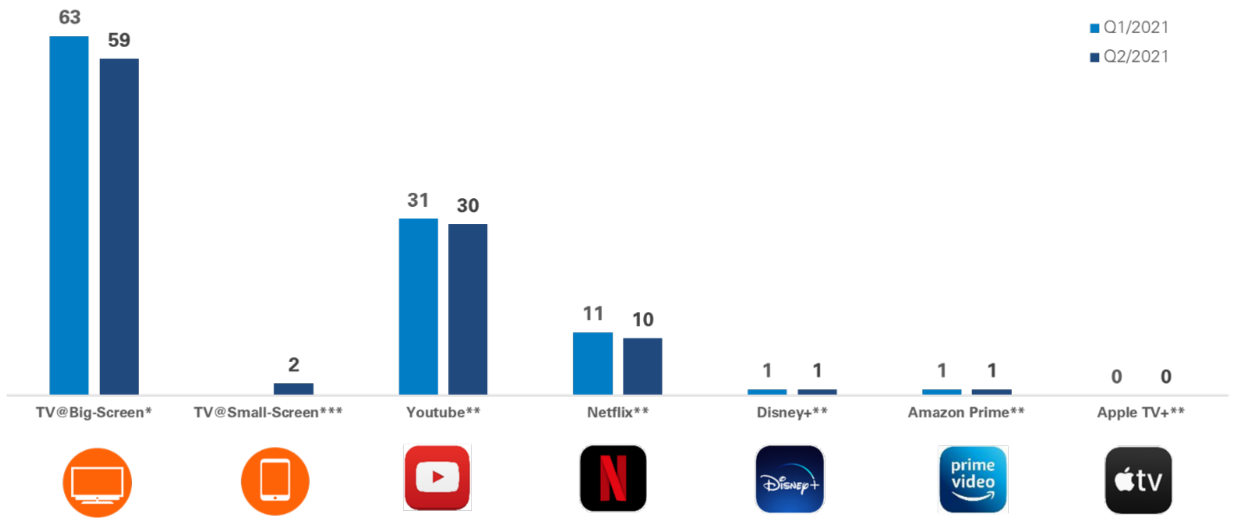
The presentation of the results follows the three parameters: Net Reach, Exposure Time and Viewing Time. The focus is on the figures for the second quarter of 2021. Where possible and appropriate, comparisons are made with the findings of the first quarter. All figures refer to the entire TV universe and thus to persons aged three years and older in Swiss private households with at least one TV set.

3.1. Reach

As in the first Quarterly Report, in early summer 2021 it is still the case that three of the five streaming platforms under consideration only register a negligible Daily Reach and so are not considered further (cf. Figure 3). These are Disney+, Amazon Prime and Apple TV+.

Figure 3: Daily Reach (NR) in percent

Whole of Switzerland



*Mediapulse TV data, 1 January – 30 June 2021, persons aged 3+ (with guests), NR %, 24 hrs, Mon–Sun, all TV platforms, Live + recorded view, consumption at home, TV set
**Mediapulse STREAMING data, 1 January – 30 June 2021, persons aged 3+, NR %, 24 hrs, Mon–Sun, streaming platforms, CONSUMPTION AT HOME, all screens
***Mediapulse STREAMING Data 1 May – 30 June 2021, persons aged 3+, NR %, 24 hrs, Mon–Sun, Web-TV platforms, CONSUMPTION AT HOME, small screens

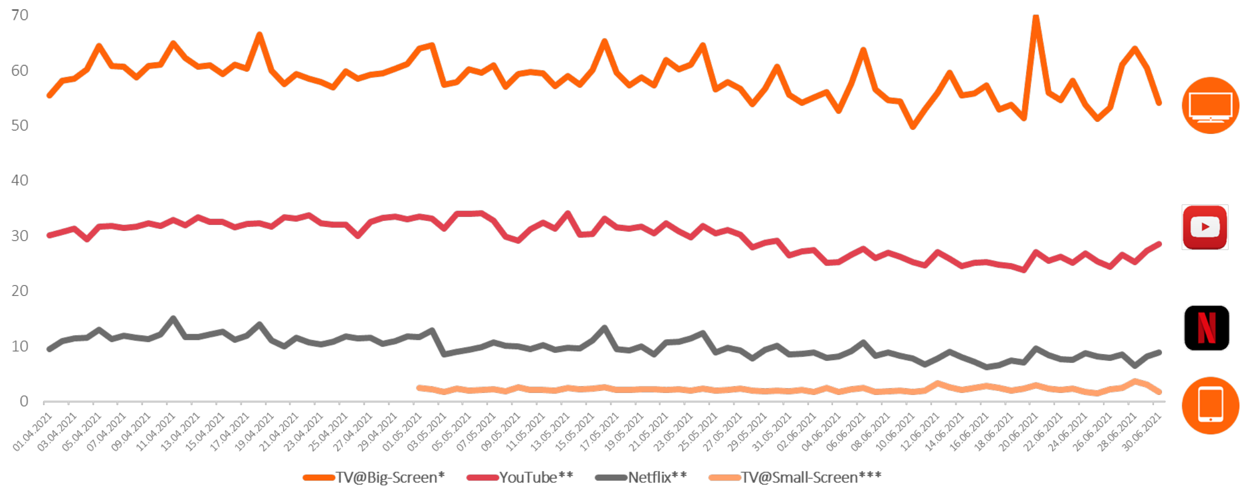
Both traditional TV and YouTube and Netflix have lost reach compared to the first quarter, which is a usual seasonal development, for TV at least. All in all, there is no change in the relative audience shares recorded in the first quarter. The television audience is roughly twice the size of YouTube's user base and about six times that of Netflix.

Although the reach of TV offerings via small screen devices is greater than that of Disney+, Amazon Prime or Apple TV+, at two percent it is likewise at a very low level. This applies to both major language regions, while the figure in Svizzera italiana is slightly higher at four percent. In addition, initial combined analyses reveal a considerable overlap between TV users on conventional sets and those on the new devices, suggesting a fairly low incremental TV reach.

The relative shares of the broadcast categories under consideration are also stable over the course of the second quarter, as Figure 4 illustrates. Additionally, in television the impact of the two matches of the Swiss national team at Euro 2020 on 20 June (vs. Turkey) and 28 June (vs. France) is clearly visible.

Figure 4: Daily Reach figures over the course of Q1/2021 in percent

Whole of Switzerland



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3.2. Exposure Time and Viewing Time

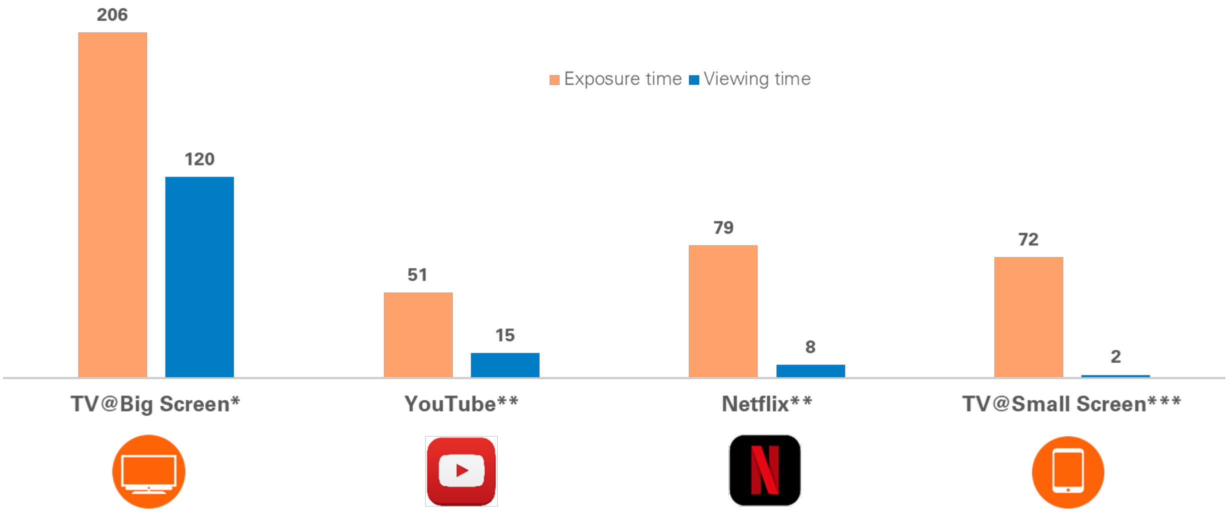
When comparing the consumption volumes, Exposure Time offers the advantage that the different reach values of the various offerings are not factored in. From this perspective, it can be seen that a YouTube user uses the platform for an average of 51 minutes per day (cf. Figure 5). A Netflix user, on the other hand, spends significantly longer, at 79 minutes a day. The difference is even more pronounced in TV consumption across different devices. A user spends an average of 206 minutes a day on a conventional TV set, almost three times longer than a TV user on a small-screen device.

Unlike Exposure Time, Viewing Time permits a fair comparison of different offerings, because here all persons in the universe are lumped together on a uniform basis. From this perspective, the ranking of the two non-TV offerings changes (cf. Figure 5). Significantly greater Net Reach and a lower Exposure Time help YouTube to achieve a viewing time of 15 minutes per day, which is almost twice as high as that of Netflix.

In the case of TV consumption, the comparison of Viewing Time makes it clear that television is viewed almost exclusively on TV sets, and where no actual TV set is involved, it is currently a niche product at best. However, this must be seen in light of the fact that currently the only TV consumption on non-TV sets that can be covered is that which takes place via the webTV platforms under consideration. Eventually the inclusion of the broadcasters' own offerings will reveal whether this assessment is still valid.

Figure 5: Daily Exposure Time (ET) and Viewing Time (VT) in minutes

Whole of Switzerland



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4. Conclusion

The second Quarterly Report on Mediapulse Streaming Data almost completely confirms the findings of the first Report and thus suggests that there is currently no significant dynamic shift taking place in the redistribution of consumption budgets for video offerings. In the second quarter of 2021, the offerings of the TV stations are still dominant in this area. YouTube and Netflix are still the only two serious non-TV competitors, albeit at a considerable distance. YouTube scores points mainly in terms of reach, Netflix more in terms of the duration of consumption.

At the same time, it can be noted that even when TV consumption via desktops, laptops, tablets or smartphones is also factored in, the lead enjoyed by television scarcely increases at all. Even if the measurement is still incomplete, and sporadic impressive gross viewing figures fuel expectation in this respect, the net figures presented suggest that at the moment it is virtually impossible to tap into new audiences via small screens and that only marginal potential exists for increased TV consumption volume outside the traditional TV set.

5. Short description of method

Universe:	Persons aged three and over in private households with at least one TV set
Universe size:	~7.5 million persons
Sample size:	1,870 households comprising some 4,300 persons
Number of online devices:	~9,000 (desktops, laptops, tablets, smartphones, connected TVs)
Method:	Continuous technical measurement based on audio matching (TV set) or router meter (TV set and non-TV set)
Context of consumption:	General within households (at-home focus)
Research service provider:	Kantar Switzerland

About Mediapulse
As an independent industry organisation, Mediapulse is charged with collecting data on the consumption of radio and TV programmes as well as online services in Switzerland. This data has the status of official figures and is used by broadcasters and programme makers, the advertising industry, government agencies and for research.

As a company with a strong practical focus, Mediapulse seeks to support the Swiss electronic media and advertising market with research services and data products. Modern systems and constant innovations ensure that changes in the use of audiovisual media can also be mapped.

Mediapulse stands for a neutral, independent, transparent and scientific approach to media research and is under the supervision of DETEC (OFCOM). A large part of the market is represented on the Board of Directors of Mediapulse AG and the Board of Trustees of the Mediapulse Foundation.

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