Mediapulse Streaming Data – Quarterly Report Q3/2021

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 Media Switzerland playing a major role in its development and implementation. Initial results were published as quarterly reports in April 2021 and July 2021. The following Report on the third quarter of 2021 is a continuation of this publication.

Like the two previous publications, the current report 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. While this was previously done on the basis of total values, the latest edition of Mediapulse Streaming Data now also provides breakdowns of the reach figures by the target group characteristics of age and gender.

We have not included any details of the methodological principles on the Mediapulse Streaming Data is based. Please refer to the corresponding explanations in the first Quarterly Report as well as to the factsheet about the expansion of Mediapulse TV research (www.mediapulse.ch). For the sake of better comprehensibility of the results, however, the following chapter will once again make clear which media formats are covered by Mediapulse Streaming Data under what limitations and what performance data is involved.

2. Media categories and performance data

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 three or over 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 end 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, DTT).
- 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 described above and highlights another difference between the formats: only the existing TV research is able to take the consumption measured and break it down by station 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 designated media 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	Offering	1 January – 30 September 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 September 2021
YouTube **Netflix** **Disney+** **Amazone Prime** **Apple TV+**	Consumption of the platforms on TV set, PC (desktop, laptop), tablet and smartphone	All Screens	Platform	1 January – 30 September 2021

In order to quantify the users and consumption of these three broadcast categories and compare them with each other, three key parameters of TV research are used. 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 two different ways of measuring the scope of consumption. Figure 2 provides an overview of the three variables.

Figure 2: Overview of the designated media categories

Consumer and consumption 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 consumption time of all persons in the given universe	minutes

3. Results

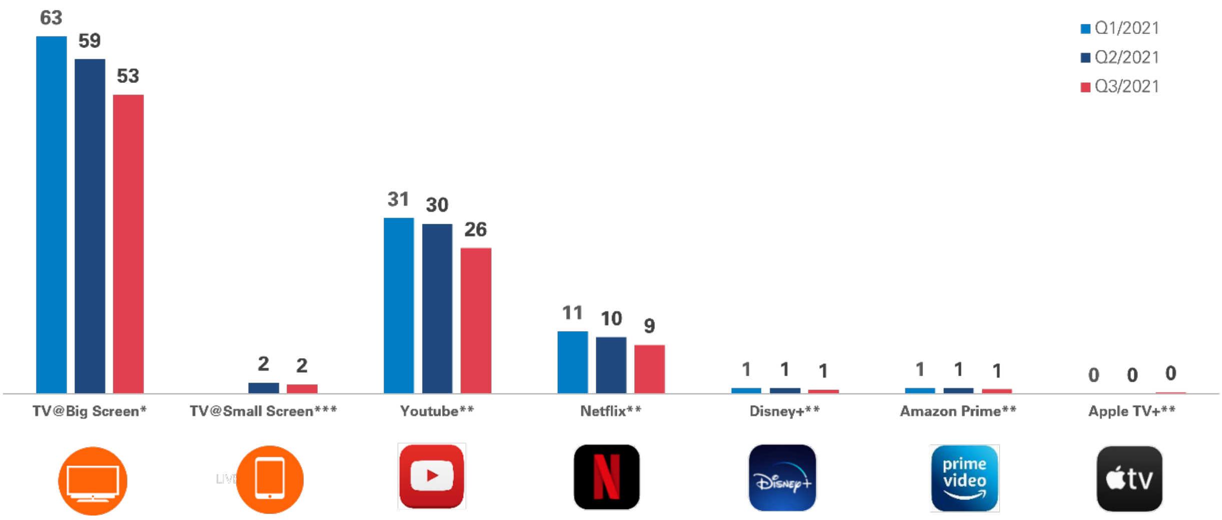
The presentation of the results follows the three parameters: Net Reach, Exposure Time and Viewing Time. The focus is on the figures for the third quarter of 2021. Where possible and appropriate, comparisons are made with the findings of the first two quarters. All figures refer to the TV universe and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

3.1. Total reach

Firstly, a look at the reach figures and their evolution over three quarters (Figure 3) shows little movement on the three platforms Disney+, Amazon Prime and AppleTV. Given that their daily reach is still marginal in the third quarter, there is again no need to perform further analyses of these three platforms. Secondly, the same applies to the reach of TV offerings not involving the classic TV set. Although they reach more viewers than Disney+ or Amazon Prime, at just two percent reach, they have so far only played a minor role compared to TV consumption on the big screen.

Figure 3: Daily reach per quarter in percent

Whole of Switzerland



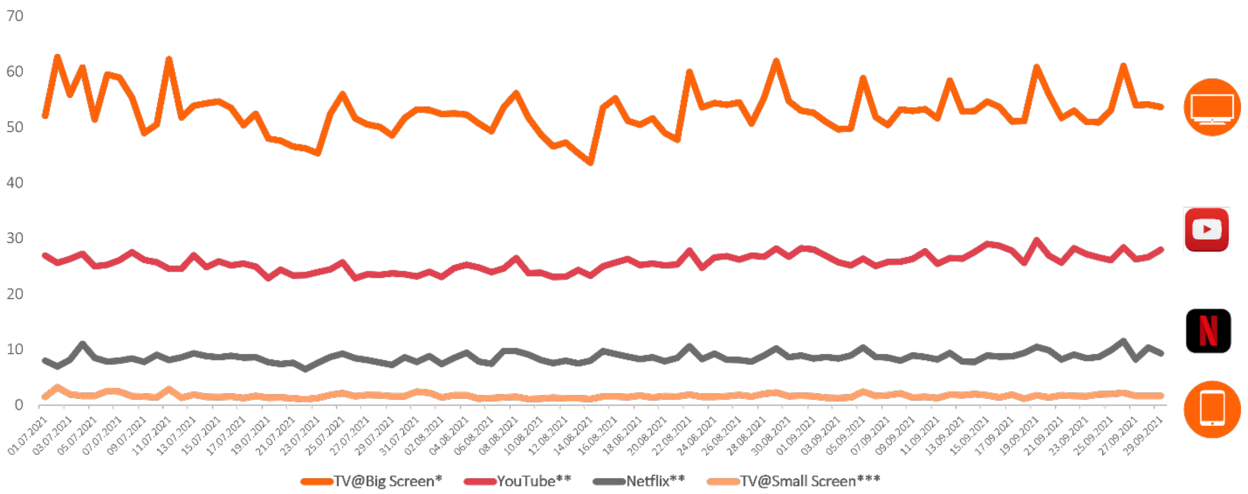
*MEDIAPULSE TV DATA, 1 JANUARY – 30 SEPTEMBER 2021, PERSONS AGED 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
**MEDIAPULSE STREAMING DATA, 1 JANUARY – 30 SEPTEMBER 2021, PERSONS AGED 3+, NR %, 24 HRS, MON–SUN, STREAMING PLATFORMS, CONSUMPTION AT HOME, ALL SCREENS
***MEDIAPULSE STREAMING DATA 1 MAY – 30 SEPTEMBER 2021, PERSONS AGED 3+, NR %, 24 HRS, MON–SUN, WEBTV PLATFORMS, CONSUMPTION AT HOME, SMALL SCREENS

Thirdly, the Q3 data confirm what was already apparent in the second quarter: the known seasonality of TV consumption is also reflected in the two relevant non-TV providers. Compared to the winter months, television is able to reach significantly fewer viewers in the summer, especially in the holiday months, which is confirmed by the quarterly figures in Figure 3. This trend can also be documented for the two most important competitors of the TV providers. And since the relative seasonal decline from Q2 to Q3 for YouTube and Netflix is comparable to that of television, the size ratios between these three forms of offering in the third quarter are the same as in the first half of the year: TV reaches twice as many viewers per day as YouTube and about six times as many people as Netflix.

These ratios are not only evident in the aggregation over three months, but also manifest themselves at the level of daily figures over the quarter with very stable trend values (cf. Figure 4).

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

Whole of Switzerland



*MEDIAPULSE TV DATA, 1 JULY – 30 SEPTEMBER 2021, PERSONS AGED 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN , ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV-SET
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3.2. Reach by language region and target group

YouTube distribution is identical in all three language regions, as can be seen in Figure 5. Netflix has a slightly higher penetration in Svizzera italiana than in the other two language regions, similar to television, which traditionally can rely on a higher affinity south of the Gotthard than in the other two regions.

Figure 5: Daily reach by language region in percent

Whole of Switzerland and language regions

	TV@Big Screen*	TV@Small Screen***	YouTube **	Netflix **	Disney+ **	Amazon Prime**	Apple TV+**
German-speaking Switzerland	53	2	26	8	1	1	0
Suisse romande	51	2	26	9	1	1	0
Svizzera italiana	59	3	26	11	1	1	0
Whole of Switzerland	**53**	**2**	**26**	**9**	**1**	**1**	**0**

*MEDIAPULSE TV DATA, 1 JULY – 30 SEPTEMBER 2021, PERSONS AGED 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV-SET
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Unlike in the first two Quarterly Reports, the reach data in the current Report can be broken down by age group and gender for the first time (cf. Figure 6). A comparison of the reach figures for men and women reveals the next characteristic that Netflix and TV share: both achieve slightly higher reach figures among women than among men. YouTube, on the other hand, is somewhat more widespread among men than among women.

Figure 6: Daily reach by age and gender in percent

Whole of Switzerland

		TV@Big Screen*		Netflix**
Age groups	**3–14 years**	31	19	10
	15–29 years	24	33	15
	30–39 years	44	29	12
	40–49 years	56	32	11
	50–59 years	66	25	6
	60+ years	78	19	2
Gender	**Women**	54	25	10
	Men	52	27	8

*MEDIAPULSE TV DATA, 1 JULY – 30 SEPTEMBER 2021, PERSONS 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
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If we look at the reach in the different age groups, the similarities between TV and Netflix come to an end. While the reach of television increases with age, the opposite is true of Netflix. For YouTube, on the other hand, there is more of a normal distribution with higher figures in the age groups between 15 and 49. However, this is only sufficient to trump television in the 15–29 age group. In all other age groups, the offerings of the TV channels are still able to reach more people than those of the two digital challengers.

3.3. Exposure Time and Viewing Time

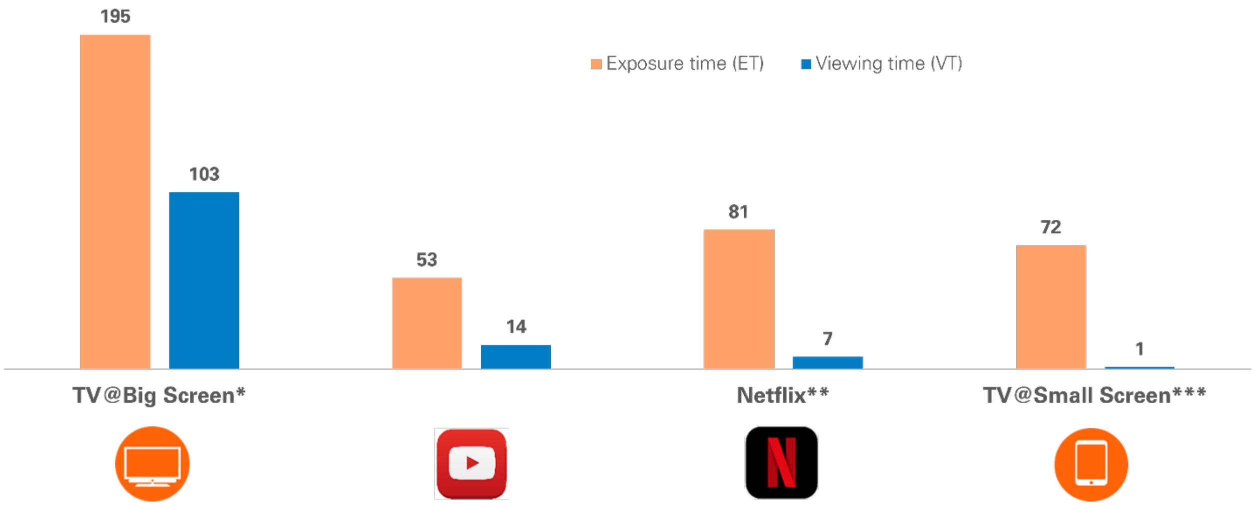
When comparing the consumption volumes, Exposure Time offers the advantage that the different reach values of the various offerings are not factored in. From this perspective, it can be seen that a YouTube user uses the platform for an average of 53 minutes per day in the third quarter of 2021 (cf. Figure 7). A Netflix user, on the other hand, spends significantly longer, at 81 minutes a day. The difference is even more pronounced in TV consumption across different devices. A user watches an average of 195 minutes of TV a day on a conventional television set, almost three times longer than a TV consumer on a small-screen device.

Unlike Exposure Time, Viewing Time permits a fair comparison of different offerings, because the consumption of these formats is averaged out over all persons in the universe and thus over a uniform basis. From this perspective, the ranking of the two non-TV offerings changes (cf. Figure 7). Significantly greater Net Reach and a lower Exposure Time help YouTube to achieve a viewing time of 14 minutes per day, which is twice as high as that of Netflix.

With respect to TV consumption, a comparison of the viewing time makes it clear that very nearly all TV is watched on a TV set. Small-screen devices account for less than 1 percent of total TV consumption. However, this must be seen in the light of the fact that currently the only TV consumption that can be taken into account 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 accurate or needs modifying.

Figure 7: Daily Exposure Time (ET) and Viewing Time (VT) in minutes

Whole of Switzerland



*MEDIAPULSE TV DATA, 1 JULY – 30 SEPTEMBER 2021, PERSONS AGED 3+ (WITH GUESTS), VD, SD, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
**MEDIAPULSE STREAMING DATA, 1 JULY – 30 SEPTEMBER 2021, PERSONS AGED 3+, VD, SD, 24 HRS, MON–SUN, STREAMING PLATFORMS, CONSUMPTION AT HOME, ALL SCREENS ***MEDIAPULSE STREAMING DATA 1 JULY – 30 SEPTEMBER 2021, PERSONS AGED 3+, VD, SD, 24 HRS, MON–SUN, WEBTV PLATFORMS, CONSUMPTION AT HOME, SMALL SCREENS

4. Conclusion

The third Quarterly Report on Mediapulse Streaming Data largely confirms the findings of the first two Reports, suggesting that there is currently no great significant dynamic shift taking place in the consumption budgets for video offerings. In the third 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.

The current report provides new insights by proving, firstly, that the use of the two relevant streaming offers fluctuates seasonally and that their reach declines in the summer months to the same extent as that of television. Secondly, for the first time, the Report allows the Mediapulse Streaming Data to be broken down by the target group characteristics age and gender. This shows that television is under pressure from the new competitors, especially in the young and middle-aged target groups, but has so far only had to cede its series title as King of Reach to YouTube in the 15-to-29 age group.

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:	~10,000 (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 Media 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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