Mediapulse Streaming Data – Quarterly Report Q1/2021

Initial results of expanded TV research by Mediapulse AG

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1. Starting point and initial question

After decades of linear TV programming defining and dominating the private consumption of 'moving images', in recent years television companies have been increasingly confronted with powerful competition from digital video providers, who are competing against this dominant position either with subscription-based streaming services or ad-financed video platforms. Their success depends on the crucial question of whether and to what extent users do – or do not – reallocate their naturally limited resource of available viewing time.

An answer to this question is anything but trivial. Although there is no lack of figures on the distribution and use of video and streaming platforms, this data is typically supplied by the providers themselves and thus rarely allows independent validation. Furthermore, it usually represents only a single type of offering or platform and is based on databases and operating figures that do not correspond to any market standard and consequentially neither permits drawing any general comparison across offerings nor provides an integrated view of video consumption and its evolution.

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 enabling uniform quantisation and continuous monitoring of the consumption of television and other video offerings. This expanded measurement system has been in place since the beginning of 2021. The purpose of the following report is to present initial results on the distribution and use of video and streaming platforms and to compare them with the performance data for TV consumption. The evaluation period is the first quarter of 2021.

2. Methodological basis and current expansion phase

The methodological basis for the expanded television research is the installation of a new measuring device in the households of the Mediapulse TV Panel. This measuring device enables us to identify all internet-enabled consumer devices in the panel households, to record the accessing and consumption of a limited number of online offerings defined by a filter list (whitelist), and to associate this consumption with individual panel members, including the time and duration of consumption. In this first phase, the device recognises solely the general consumption of the various platforms. It would be possible to measure the content consumed on these platforms, but this would require the willingness of the providers to cooperate technically, which is not the case with most platform operators.

In the current expansion phase of the measurement system, only the major international platforms are covered. These include the video platform YouTube as well as the streaming providers Netflix, Disney+, Amazon Prime and Apple TV+. In the second expansion phase starting in April, this list will be extended to include platforms that distribute TV programmes on the internet but have not supported Mediapulse's TV research to date.

Besides the limitation of the number of measured services currently, it should be borne in mind in the interests of direct comparability that the following evaluations are based on the existing framework of Mediapulse television research. This has three important consequences:

- 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 holds true for about 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 analyses for the reported consumption data of the non-TV offerings, i.e., their use out of home is not considered.
- Thirdly, current research registers TV consumption on conventional television sets only. This restriction is also maintained in the following figures on TV consumption. The figures for non-TV offerings, on the other hand, include consumption on all screens, i.e., both via the TV set as well as via PC, laptop, tablet or smartphone.

The Mediapulse roadmap for the further development of TV research stipulates plans to eliminate all three limitations during further expansion phases. Preliminary groundwork is currently underway, such as the expansion of the panel to include households without TV sets.

3. Results

Considering the limitations mentioned, the following conclusions can be drawn about the distribution and consumption volume of video offerings in Swiss private households for the first quarter of 2021.

3.1. Distribution

In the first quarter of 2021, the total offerings of the TV stations reach 66 percent of the resident population aged 3+ in TV households each day (cf. Table 1). With a reach of 60 percent, live TV offerings have a significantly higher reach than time-shifted TV content (Replay TV), which is consumed by 33 percent of the universe every day.

Table 1: Daily reach by language region in percent

	Total TV *	Live TV *	Replay TV *	YouTube **	Netflix **	Disney+ **	Amazon Prime**	Apple TV+**
Deutschschweiz	65	60	32	30	11	1	1	0
Suisse romande	66	60	38	32	14	1	1	0
Svizzera italiana	74	69	38	30	14	1	1	0
Switzerland total	**66**	**60**	**33**	**31**	**11**	**1**	**1**	**0**

*MEDIAPULSE TV DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+ (WITH GUESTS), NRW-%, 24H, MO-SU, ALL TV-PLATFORMS, OVERNIGHT+7 (TOTAL TV)/ LIVE (LIVE TV)/ RECORDED VIEW (REPLAY TV), USAGE AT HOME, TV-SET.

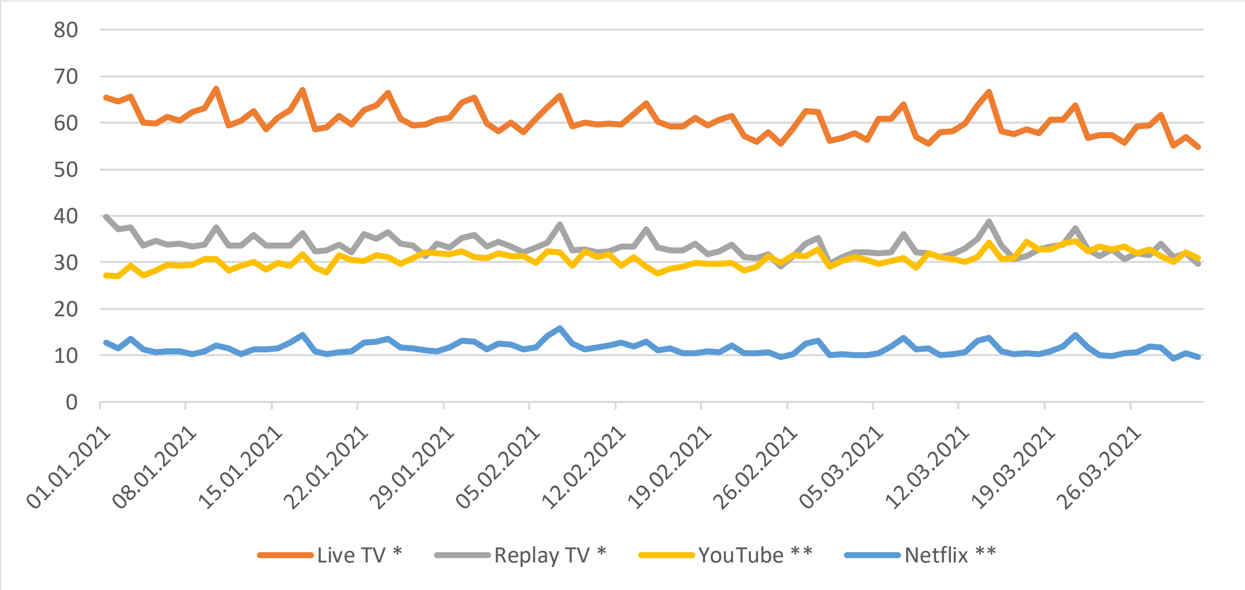
**MEDIAPULSE STREAMING DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+, NRW-%, 24H, MO-SU, STREAMING-PLATFORMS, USAGE AT HOME, TV-SET/ SMARTPHONE/ DESKTOP/ LAPTOP/ TABLET.

Among the non-TV offerings, the video platform YouTube boasts a significantly larger user base at 31 percent than Netflix with a reach of 11 percent. All other streaming providers considered are currently still at a very low level of daily reach, which is why they are not considered in the further analyses.

Traditionally there is a greater affinity for TV in the French and Italian language regions, which is also reflected in the first three months of the current year. The same affinity is reflected in the non-TV offerings, with slightly higher penetration figures for Netflix in the western and southern part of the country, and for YouTube in *Suisse romande*.

Figure 1 illustrates the development of daily reach for all regional areas (Switzerland total) over the course of the first quarter of 2021 and once again indicates the relative sizes of each user base. Furthermore, a high degree of stability can be observed in all reach patterns, which indicates that the use of non-TV offerings is subject to similar habitualisation processes as traditional TV. Finally, there is a higher consumption of Netflix at weekends – a pattern that has always been typical of TV consumption, but one that YouTube consumption does not appear to follow so clearly.

Diagram 1: Daily reach over the course of Q1/2021 in percent



*MEDIAPULSE TV DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+ (WITH GUESTS), NRW-%, 24H, MO-SU, ALL TV-PLATFORMS, OVERNIGHT+7 (TOTAL TV)/ LIVE (LIVE TV)/ RECORDED VIEW (REPLAY TV), USAGE AT HOME, TV-SET.

**MEDIAPULSE STREAMING DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+, NRW-%, 24H, MO-SU, STREAMING-PLATFORMS, USAGE AT HOME, TV-SET/ SMARTPHONE/ DESKTOP/ LAPTOP/ TABLET.

3.2. Exposure time

While reach figures are considered indicators of the degree of penetration of a media offering, information about the consumption volume provides important clues as to the intensity of consumption in each case. In TV research, two variables have become established for this, which differ in terms of their respective percentage basis and so allow two different statements to be made. For the daily exposure time, the total consumption volume of an offering over one day is added up and then divided by the number of actual consumers of the offering on that day. This is also referred to as the average duration of consumption per user, a volume variable that is not influenced by the reach of an offering.

Table 2: Daily exposure by language region in minutes

	Total TV*	YouTube**	Netflix**
Deutschschweiz	207	50	80
Suisse romande	233	57	82
Svizzera italiana	249	48	85
Switzerland total	**216**	**51**	**81**

*MEDIAPULSE TV DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+ (WITH GUESTS), VD, 24H, MO-SU, ALL TV-PLATFORMS, OVERNIGHT+7 (TOTAL TV), USAGE AT HOME, TV-SET.

**MEDIAPULSE STREAMING DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+, VD, 24H, MO-SU, STREAMING-PLATFORMS, USAGE AT HOME, TV-SET/ SMARTPHONE/ DESKTOP/ LAPTOP/ TABLET.

Table 2 shows the corresponding data on exposure time per video offering and language region. For Switzerland as a whole, the table illustrates that people who consume the offerings of the TV channels, live or time-shifted, do so for an average 216 minutes per day, or just over three-and-a-half hours. This figure ranges from 207 minutes in German-speaking Switzerland to 249 minutes in the Italian language region.

For Netflix, as a typical provider of long-form videos, the exposure time nationwide is 81 minutes per day. Visitors to YouTube, where the video offering tends to be dominated by short forms, spend 51 minutes a day on the platform, representing a significantly lower exposure time than Netflix and particularly than classic television. In a comparison of language regions, YouTube registers its highest figure in the French-language region of Switzerland, Netflix in the Italian-speaking region.

3.3. Viewing time

When calculating the daily viewing time, the consumption volume that is measured is not assigned to the actual consumers of an offering, but to all potential consumers in the defined measurement universe or in the defined target group. Viewing time thus combines both the reach of an offering and the duration of consumption, and so not only provides more information than exposure time, but also permits a fairer comparison of the audience success for different offerings. It can be interpreted as the average viewing time of any person in the universe (not just the users of the respective offering).

Table 3: Daily viewing time by language region in minutes

	Total TV*	YouTube**	Netflix**
Deutschschweiz	134	15	8
Suisse romande	153	18	11
Svizzera italiana	185	14	12
Switzerland total	**141**	**16**	**9**

*MEDIAPULSE TV DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+ (WITH GUESTS), SD, 24H, MO-SU, ALL TV-PLATFORMS, OVERNIGHT+7 (TOTAL TV), USAGE AT HOME, TV-SET.

**MEDIAPULSE STREAMING DATA, 1.1. – 31.3.2021, TOTAL INDIVIDUALS 3+, SD, 24H, MO-SU, STREAMING-PLATFORMS, USAGE AT HOME, TV-SET/ SMARTPHONE/ DESKTOP/LAPTOP/ TABLET.

Table 3 provides such a comparison, again for the first quarter of 2021. This shows that each person aged 3+ in the defined universe spends an average of 141 minutes per day watching classic TV programming. Again, this figure varies across the language regions, ranging from 134 minutes in *Deutschschweiz* to 185 minutes in *Svizzera italiana*. About three-quarters of the TV viewing time measured is accounted for by live programming, one-quarter by time-shifted forms (Replay TV).

YouTube and Netflix viewing time is significantly lower than TV viewing volume, amounting to some 16 minutes per person per day for YouTube, compared with 9 minutes for Netflix. YouTube records a slightly higher usage volume in *Suisse romande* than in the other two language regions. The Netflix viewing time also reflects the higher affinity for video content in western and southern Switzerland, which has already been sufficiently documented over many years in the context of TV research.

4. Conclusion and outlook

In the first quarter of 2016, television registered a daily reach of 68 percent and a daily viewing time of 146 minutes. Five years later, the genre has lost 2 percentage points in reach and 5 minutes in duration of consumption. The analyses presented in this report do not permit any conclusion to be drawn as to whether this decline may have been caused by the new digital video competition. However, the data at hand show that the two most important platforms, YouTube and Netflix, have become established in Swiss households and are supplementing rather than replacing the still popular TV offerings. The two platforms offer complementary mechanisms. YouTube can already count on a considerable, stable user base, but is only able to retain them with its offerings for a much shorter time than TV programming. Netflix users show significantly more consumption (time) here, but their numbers are currently still a long way behind the hordes of TV viewers. The fact that subscription figures, which are occasionally bandied about, sometimes paint a different picture is not a contradiction, but rather confirms the truism that access does not automatically translate into (daily) consumption.

Taking all the findings together while considering the short observation period and the limitations mentioned above, it can be concluded that there is not (yet) any significant shift in consumption budgets away from classic television, unless it is taking place only in specific target groups that have not yet been analysed in this report. If the offerings of TV, YouTube and Netflix are combined into a single market based on the target group of individuals aged 3 and older, this market is still dominated by TV offerings with a 'market share' of 85 percent. This does not take into account the fact that TV offerings can of course also be consumed via the two other platforms, but without the cooperation of these platforms, this consumption cannot be broken down separately. Having said that, a noticeable shift in consumption budgets is indeed taking place in the way TV is consumed, moving from live consumption to time-shifted retrieval of TV content. While time-shifted viewing accounted for 12 percent of total TV consumption in the first quarter of 2016, it has doubled over the past five years to 25 percent in Q1/2021, a trend that seems set to continue.

With the figures on the consumption of video and streaming platforms presented here for the first time on the basis of expanded TV research, the foundation has been laid for the long-term monitoring of the development of consumption budgets and consumption preferences. Further planned expansion phases of TV research towards comprehensive research of all video formats will gradually enhance the informative value of the collected data and its general applicability. At the same time, Mediapulse will continue the reporting that started with this report and will strive to make the corresponding data available and analysable not only in text and table form, but also via suitable dashboards.

Short description of method

Universe:	Persons aged three and older 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 (PCs, laptops, tablets, smartphones, connected TVs)
Method:	Continuous technical measurement based on audio matching (TV offerings via Kantar People Meter) or router meter (streaming/ video offerings via Kantar Focal Meter)
Context of consumption:	Generally within households (at home focus).

TV consumption is measured exclusively on conventional TV sets, but consumption of non-TV offers is recorded on all screens, i.e. both via the television set and via PC, laptop, tablet or smartphone.

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.

The detailed research report and the data analyses can be found on our website at www.mediapulse.ch

For further information, please contact:

Christian-Kumar Meier
Head of Marketing
christian-kumar.meier@mediapulse.ch
+41 58 356 47 08