Mediapulse Streaming Data – Quarterly Report Q4/2021

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. The first results were published in the form of quarterly reports from April 2021. The following Report on the fourth quarter of 2021 is a continuation of this publication.

Like the 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 done in the first two quarterly reports on the basis of total values, the report for the third quarter also provided breakdowns of the reach values according to the target group characteristics age and gender for the first time. The latest edition of the Mediapulse Streaming Data continues this trend and includes a differentiation of streaming usage by end device.

We have not included information on the methodological basis of the Mediapulse Streaming Data. Please refer to the corresponding explanations in the first Quarterly Report as well as to the Factsheet on the expansion of Mediapulse TV research (available in German 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 broadcast 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 – 31 December 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 – 31 December 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 January – 31 December 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 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 reported performance data
User 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

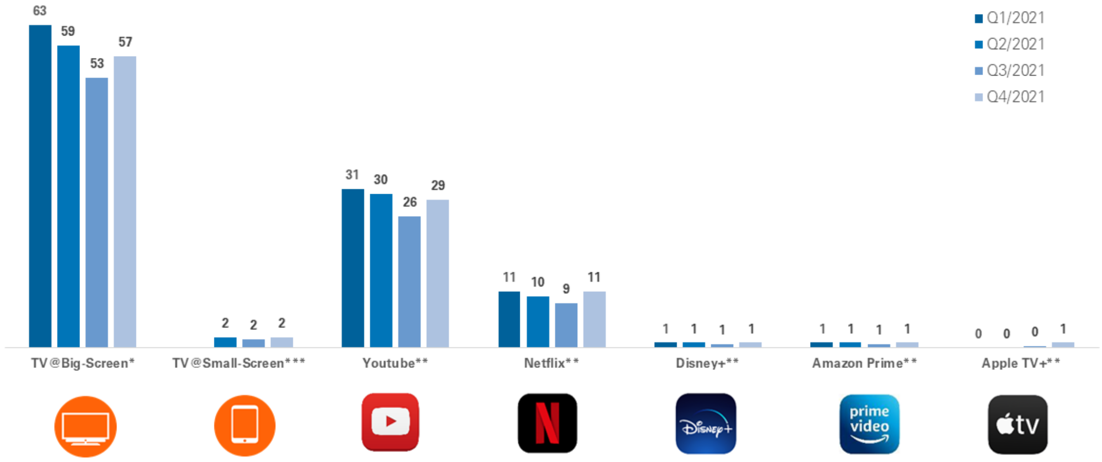
3. Results

The presentation of the results follows the three parameters: Net Reach, Exposure Time and Viewing Time. The focus lies on the figures for the fourth quarter of 2021. Where possible and appropriate, comparisons are made with the findings of the first three 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

With the data for the fourth quarter, Mediapulse Streaming Data is now available for a complete calendar year. The diagram (Figure 3) shows that the relative proportions between the different media formats are very stable throughout the year. The majority of viewers at any time of the year watch classic television, almost exclusively on a classic television set. The YouTube video platform and the Netflix streaming provider also achieve relevant audience proportions. In comparison, the other streaming platforms Disney+, Amazon Prime or AppleTV+ reach only very few people, which is why they are no longer taken into account in the further data evaluations.

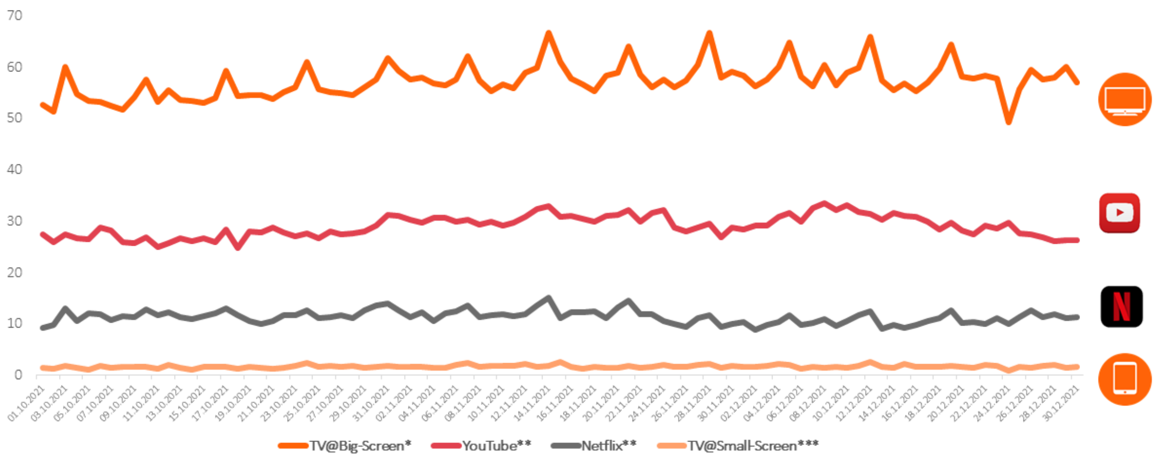
Figure 3: Daily reach per quarter in percent
Whole of Switzerland



*MEDIAPULSE TV DATA, 1/1 – 31/12/2021, PERSONS 3+ (WITH GUESTS), NR %, 24H, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
**MEDIAPULSE STREAMING DATA, 1/1 – 31/12/2021, PERSONS 3+, NR %, 24H, MON–SUN, STREAMING PLATFORMS, CONSUMPTION AT HOME, ALL SCREENS
***MEDIAPULSE STREAMING DATA, 1/5 – 31/12/2021, PERSONS 3+, NR %, 24H, MON–SUN, STREAMING PLATFORMS, CONSUMPTION AT HOME, ALL SCREENS

While the proportions hardly change over the course of the year, the reach achieved by YouTube and Netflix follows the seasonal pattern that has also been empirically demonstrated extensively for TV consumption. In both cases, the largest reach is achieved at the beginning of the year. The reach then drops gradually, bottoming out in the holiday months and then rising again until the pre-Christmas period. The parallel reach trends between TV, YouTube and Netflix can be observed down to the micro level by illustrating (Figure 4) the course of daily reaches over the fourth quarter. The differences that can be identified here are, on the one hand, that the typical TV usage peaks at the weekend are more noticeable with Netflix than with YouTube. On the other hand, the demand for YouTube content seems to be somewhat lower during the Christmas season.

Figure 4: Daily reach on a quarterly basis in percent
Whole of Switzerland



*MEDIAPULSE TV DATA, 1/10 – 31/12/2021, PERSONS 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
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3.2. Reach based on language regions, target groups and end devices

Looking at the reach values not only globally but broken down into various subgroups, TV and Netflix appear to be more closely related than TV and YouTube or YouTube and Netflix. In a language-regional comparison, the Italian-speaking part of Switzerland is significantly above the national average for TV and Netflix than for YouTube (Figure 5). TV and Netflix are slightly more popular with women than with men, while YouTube appeals more to men than to women (Figure 6). And finally, TV and Netflix reach their audience primarily on the classic TV set, while YouTube is mostly watched at home on small screen devices (Figure 7).

It is only when focusing on the reach in different age groups that the parallelism between TV and Netflix ends. While TV achieves its reach peaks in the target groups aged 40 and over, Netflix is popular above average in the age groups from 15 to 39. A cautious interpretation of this could be a complementary relationship or a division of labour between the two media formats. In contrast, YouTube is equally popular among the different age groups. The older population's greater affinity for TV does not mean, however, that television no longer reaches the young target groups. Conversely, it is true that the TV offerings reach more people in all age groups than the two streaming competitors in the fourth quarter of 2021. The only exception is the 15-29 age group, among whom YouTube has the highest consumption.

Figure 5: Daily reach by language region in percent
Whole of Switzerland and language regions

	TV@Big-Screen*	TV@Small-Screen***	YouTube**	Netflix**
German-speaking Switzerland	57	2	29	11
French-speaking Switzerland	56	2	29	12
Italian-speaking Switzerland	67	4	30	15
Whole of Switzerland	**57**	**2**	**29**	**11**

*MEDIAPULSE TV DATA, 1/10 – 31/12/2021, PERSONS 3+ (WITH GUESTS), NR %, 24 HRS, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
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Figure 6: Daily reach by age and gender in percent
Whole of Switzerland

		TV@Big-Screen*	YouTube**	Netflix**
Age groups	**3 – 14 years**	37	22	12
	15 – 29 years	24	33	18
	30 – 39 years	51	34	17
	40 – 49 years	60	37	14
	50 – 59 years	71	28	9
	above 60 years	83	22	3
Gender	**Female**	58	28	12
	Male	56	30	11

*MEDIAPULSE TV DATA, 1/10 – 31/12/2021, PERSONS 3+ (WITH GUESTS), NR, 24H, MON–SUN, ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
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Figure 7: Daily reach by end device in percent
Whole of Switzerland

		YouTube*	Netflix*	TV
Device	**TV Set**	3	6	57 **
	Smartphone	19	4	1 ***
	PC / Tablet	11	2	1 ***

* MEDIAPULSE STREAMING DATA, 1/10 – 31/12/2021, PERSONS 3+, NR, 24H, MON–SUN, STREAMING PLATFORMS, CONSUMPTION AT HOME, ALL SCREENS
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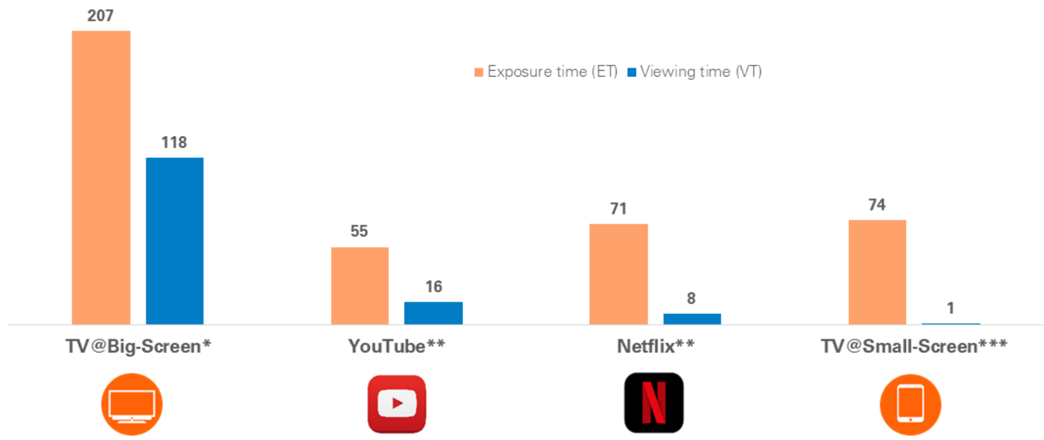
3.3. Exposure Time and Viewing Time

During the fourth quarter of 2021, people who switch on the TV set on an average day spend an average of 207 minutes watching TV (Figure 8). In contrast, those who watch TV programmes via other end devices do so for only 74 minutes. Netflix users spend 71 minutes per day on Netflix services. YouTube users watch videos for 55 minutes per day.

Calculating the duration of use not only for the effective users of the respective offerings, but for all persons in the population, the viewing time provides a value that allows both a direct comparison between the different offerings and the accumulation of minutes of use. From this perspective, we can generally conclude that a person watches 143 minutes of TV, YouTube or Netflix per day in the fourth quarter of 2021. From this total consumption, 119 minutes or 83 percent are spent watching TV, almost exclusively on a conventional TV set. YouTube follows far behind with a viewing time of 16 minutes (11 percent) and Netflix with 8 minutes per person.

Figure 8: Daily exposure and viewing time in minutes
Whole of Switzerland



*MEDIAPULSE TV DATA, 01/10 – 31/12/2021, PERSONS 3+ (WITH GUESTS), ET, VT, 24H, MON–SUN , ALL TV PLATFORMS, LIVE + RECORDED VIEW, CONSUMPTION AT HOME, TV SET
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4. Conclusion

The data on the consumption of video offerings in Swiss TV households collected by Mediapulse since the beginning of 2021 and published in four quarterly reports provides an overall very stable picture of the market relevance of various video offerings. While platforms such as Disney+, Amazon Prime or AppleTV+, as well as TV consumption beyond the conventional TV set are only marginally widespread, the YouTube video platform and the Netflix streaming service have firmly established themselves in Swiss households and are currently the only two serious video competitors to television. YouTube stands out with a reach of a good 30 percent. Netflix reaches significantly fewer consumers in comparison, but is able to retain them longer than the Google subsidiary. Nevertheless, both providers have so far been clearly overshadowed by the established video medium. If there were a joint market of TV, YouTube and Netflix, it would be dominated by TV with a market share of 83 percent.

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 audio-visual 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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