



MEASURING ONLINE RATINGS

PROGRAMME CONTENT



INTRODUCTION

Ratings research is changing, alongside the viewing behaviour of the Dutch audience. Video content is increasingly viewed online, either live or on demand. Both programmes and video commercials are reaching their target groups through the digital domain, on a wide range of devices. Such developments increase the need for accurate reporting of online behaviour, next to the existing offline viewing behaviour research.

Since 2008, SKO has been offering daily reports regarding the number of online stream starts of NPO, RTL and (later on) SBS programmes. These stream starts (also known as census data) shed light on total viewing volume, but not on the number of persons watching, nor on the profile of the viewers.

Thanks to our new project – integration of the SKO Online Panel and SKO census data – we can now provide an answer to these questions. For the first time, it is possible to measure and report the reach and the profiles of programmes and video commercials that are viewed online. Initially, the project incorporates three publishers: NPO, RTL and SBS. SKO is the first party worldwide that is able to use a hybrid method to provide high quality, detailed viewing data on a daily basis.

This project is the first phase of a larger whole: the SKO Video Data Integration Model (SKO-VIM). In the course of 2016, SKO-VIM will result in a new standard: the Video Total.

This brochure provides an outline of the first phase of our SKO-VIM project. It explains the value of the online programme content data that SKO will supply to the market, starting from January 1 2016. In the course of 2016, we will also start supplying data on online video commercials.

Bas de Vos
Managing Director Stichting KijkOnderzoek



SKO-VIM

Goal of the Video Data Integration Model (SKO-VIM) is to shed light on total viewing behaviour, including behaviour on TV sets and internet. In order to reach this goal, we measure both TV set viewing behaviour (in our current TV panel) and online viewing behaviour on every kind of device, through an online panel. We also use census data of online programmes and online video commercials.

Data integration is conducted by Kantar Media, on behalf of SKO.

SKO-VIM consists of 2 phases:

PHASE 1: MEASURING ONLINE VIEWING BEHAVIOUR NEXT TO TV-SET BEHAVIOUR

In order to realise a reliable online video currency, SKO Online Panel data and SKO Census Data need to be combined. This is the first step of data integration.

PHASE 2: INTEGRATION OF ONLINE VIEWING BEHAVIOUR AND TV-SET BEHAVIOUR

By means of fusion, the online video data will be integrated with existing ratings. This results in a cross media Video Total number, allowing us to report on the total reach of programmes and video commercials and to identify the share of 'offline' and 'online' in total reach. Of course, it will be possible to make analyses per target group, just like in phase 1.

Below, we offer a short explanation of Phase 1. The [SKO website](#) offers more detailed information about SKO-VIM.



SKO ONLINE PANEL

In order to measure online viewing behaviour, we have established the SKO Online Panel. This panel consists of 5000 persons of 6 years of age and over. Within this panel, online viewing behaviour is measured on every online device used within the household; a total of 9500 devices. Panel management is conducted by TNS Nipo and Kantar Media.

SKO CENSUS DATA

Due to the 'longtail' that is part and parcel of the internet, it can be hard to accurately measure the reach of all online video and online campaigns in the panel.

Programmes with few viewers and online video campaigns with few starts, will be hardly visible in the panel. In such situations, census data can be helpful. Census data consists of measurement totals of events on an online device; as such, it sheds light on total volume. In our project, we use census data concerning streams of programmes and video commercials viewed online. We use comScore's and Kantar Media's measurement systems to measure census data (and possible other, SKO-certified suppliers).

DATA-INTEGRATION: CENSUS DATA AND PANEL DATA

Census data does not concern persons; it does not tell us who started a stream. We only know that a stream was started on a device and for how long it was allowed to play. By combining census data with panel data, however, we are able to gain accurate insight into the reach and into the profiles of viewers. This data integration is an important element in producing online ratings.



PARTICIPANTS

In Phase 1, we will report on the online video programmes and commercials offered by NPO, RTL and SBS. Later on, other participants will join the effort, such as Discovery Networks, Disney, VIACOM, FOX International Channels Benelux and Sanoma.

WHAT IS NEW?

- Online ratings for programmes and (in due course) video commercials: who is watching online?
- By combining panel data and census data, we are able to more accurately report on the reach and viewing volume in the SKO Online Panel.
- The first effort worldwide to offer a hybrid method to supply detailed, high quality data on programmes and commercials on a daily basis.

In the following, we offer a few examples of reports in order to illustrate the usefulness of the output. The reports are based on actual data, measured in October 2015.

The results presented in the brochure are strictly meant for purposes of illustration.



WHAT WILL YOU GET?

EXAMPLES



20-34 JAAR

ZENDER	DATUM	LENGTE	TITEL	VIEWERS
RTL 5	01-10-15	61 min	Expeditie robinson 2015	3,400
RTL 4	02-10-15	23 min	Goede tijden slechte tijden	1,800
RTL 5	12-10-15	44 min	Hollands next top model	1,000
RTL 4	29-10-15	44 min	Chantal blijft slapen	1,800
RTL 4	02-10-15	95 min	VOICE OF HOLLAND THE BLIND AUDITIONS	1,800
RTL 4	30-10-15	92 min	VOICE OF HOLLAND THE BATTLE	1,800
NPO 1	04-10-15	51 min	HEEL HOLLAND BAKT	1,600
NPO 1	23-10-15	51 min	Flikken maastricht	1,600
Net 5	14-10-15	41 min	Meiden van de herengracht	1,000
RTL 4	10-10-15	100 min	Dance dance dance	1,800

13,8%

REACH AND VIEWING TIME

Currently, The Netherlands is inhabited by 15,8 million people of 6 years of age and over. 21,5% of these people watched an online NPO, RTL and/or SBS programme in October 2015. Reach of online programmes is higher among female viewers than among male viewers; 23,7% versus 19,3%. Reach within the target groups 13-19 years, 20-34 years and 35-49 years is significantly higher than within the target groups 6-12 years and 50+.

On average, the online viewer of 6 years of age and over spent a total of 86,3 minutes watching TV programmes online. Again, we see a larger share in viewing time for female viewers.

Female viewers who used the internet to watch on or more TV programmes offered by one of the three publishers currently involved in our online research, registered an average total viewing time in October of 97,1 minutes. Male viewers realised an average total viewing time of 72,8 minutes.

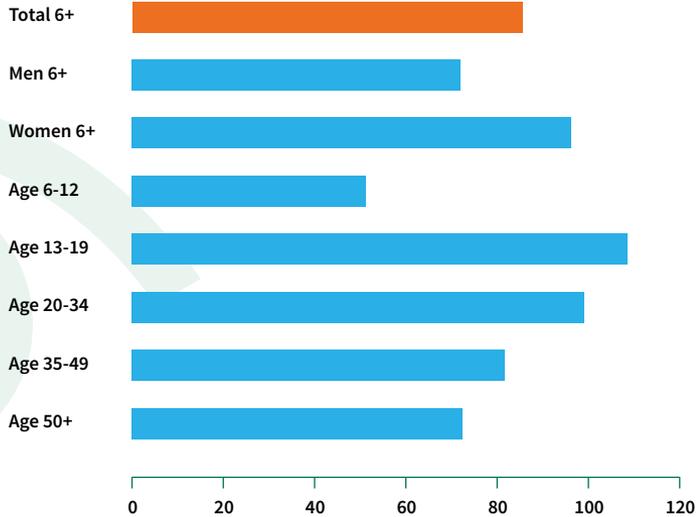
The total average viewing time among online viewers of 6-12 years and 35+ is below that of the 6+ viewing total.

Online viewers of 13-19 years of age realised an average total viewing time in October of 109,4 minutes. Theirs is the highest total average viewing time. Next highest was the average total viewing time of online viewers of 20-34 years of age; they reached a viewing time of 100 minutes.

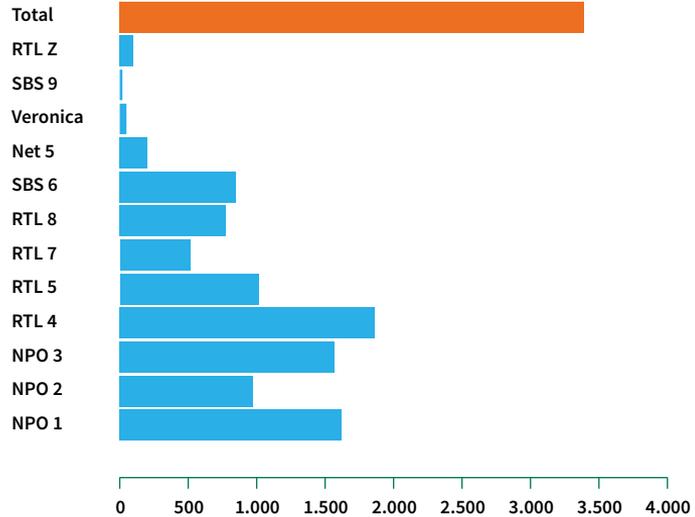
Monthly reach October 2015

	REACH %	ABSOLUTE (000)
Total 6+	21,5	3.408
Men 6+	19,3	1.514
Women 6+	23,7	1.894
Age 6-12	8,7	117
Age 13-19	24,4	343
Age 20-34	30,9	967
Age 35-49	24,7	912
Age 50+	17,1	1.069

Viewing time in minutes per month (online viewers)



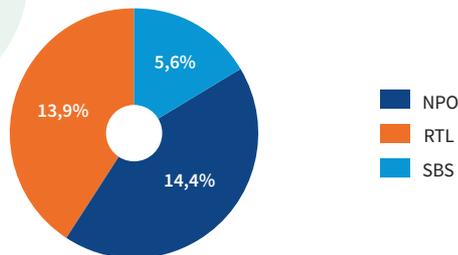
Monthly reach (*1.000) online programmes per channel 6+



REACH PER PUBLISHER AND DEVICE

The total monthly reach in October 2015 among the 6+ audience for online TV programmes offered by NPO, RTL and SBS was 21,5%. If we zoom in on the individual publishers, we see that NPO had the highest reach (14,4%), followed by RTL (13,9%) and SBS (5,6%).

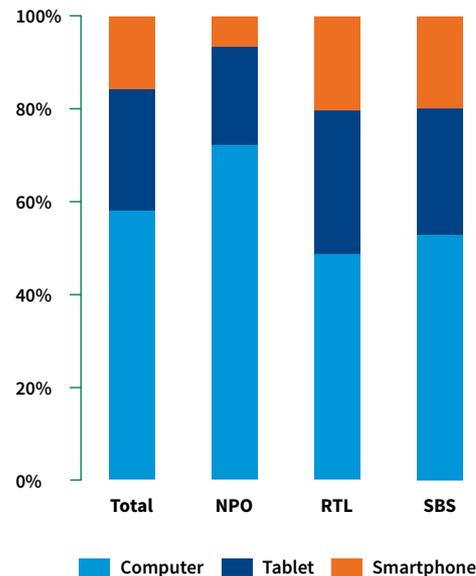
Reach per publisher



Reach can be differentiated between types of device used to view content: computer, tablet or smart phone (laptops are regarded as 'computer'.) In over 50% of all cases, a computer was used to watch programme content online, followed by the tablet and the smartphone.

The computer appears to have been used relatively more often to watch NPO programmes than RTL or SBS programmes. This may be caused by the fact that NPO did not yet have iOS measurements in October.

Reach per publisher and device



RANKING PER PUBLISHER

Which programmes were most often watched online in October 2015? Per publisher, we have made a ranking based upon online ratings.

This has resulted in a Top 3 per publisher.

The ratings numbers (abbreviated as 'kdh' for *kijkdichtheid*) express the average number of viewers within a target group that watched a programme. 'Kdh000' signifies that the number has to be multiplied with 1000.

Apart from the online ratings, the tables also indicate the ratings per programme watched on traditional TV sets (kdh000 TV). Offline and online ratings may be added up; the resulting number represents the total ratings.

RTL 6+

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH% ONLINE	KDH000 ONLINE	KDH000 TV	KDH000 ONLINE+TV	SHARE ONLINE OF TOTALE KDH
RTL 5	01-10-15	61	Expeditie robinson 2015	1,2	185	1.347	1.532	12%
RTL 4	02-10-15	23	Goede tijden slechte tijden	1,0	157	1.792	1.949	8%
RTL 5	12-10-15	44	Hollands next top model	0,9	137	602	739	19%

SBS 6+

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH% ONLINE	KDH000 ONLINE	KDH000 TV	KDH000 ONLINE+TV	SHARE ONLINE OF TOTAL KDH
Net 5	14-10-15	41	Meiden van de herengracht	0,5	84	364	448	19%
SBS 6	09-10-15	111	K3 zoekt k3	0,2	30	843	873	3%
SBS 6	20-10-15	27	Voetbal cl voorbeschuwing	0,1	23	317	340	7%

NPO 6+

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH% ONLINE	KDH000 ONLINE	KDH000 TV	KDH000 ONLINE+TV	SHARE ONLINE OF TOTAL KDH
NPO 1	23-10-15	51	Flikken maastricht	0,6	90	2.190	2.280	4%
NPO 3	11-10-15	48	Penoza 4	0,5	74	1.227	1.301	6%
NPO 1	18-10-15	50	Heel holland bakt	0,4	64	2.861	2.925	2%

RANKINGS PER AGE GROUP

Which programmes available online were viewed most often in October? We have made a ratings-Top 10 for four different age groups. The ratings number expresses the average number of viewers within a target group that watched a programme.

AGE 13-19

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH000 ONLINE
RTL 4	09-10-15	22	Goede tijden slechte tijden	40
RTL 5	01-10-15	61	Expeditie robinson 2015	38
RTL 5	12-10-15	44	Hollands next top model	31
RTL 4	09-10-15	89	Voice of holland the blind auditions	21
RTL 4	29-10-15	44	Chantal blijft slapen	19
RTL 4	10-10-15	100	Dance dance dance	18
NPO 3	26-10-15	31	Streetlab	17
NPO 1	09-10-15	46	Flikken maastricht	17
RTL 4	30-10-15	92	Voice of holland the battle	16
RTL 4	17-10-15	43	Playback je gek	13

AGE 20-34

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH000 ONLINE
RTL 5	01-10-15	61	Expeditie robinson 2015	85
RTL 4	02-10-15	23	Goede tijden slechte tijden	70
RTL 5	12-10-15	44	Hollands next top model	58
RTL 4	29-10-15	44	Chantal blijft slapen	50
RTL 4	02-10-15	95	Voice of holland the blind auditions	42
RTL 4	30-10-15	92	Voice of holland the battle	40
NPO 1	04-10-15	51	Heel holland bakt	32
NPO 1	23-10-15	51	Flikken maastricht	31
Net 5	14-10-15	41	Meiden van de herengracht	31
RTL 4	10-10-15	100	Dance dance dance	30

AGE 35-49

CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH000 ONLINE
RTL 5	01-10-15	61	Expeditie robinson 2015	44
RTL 4	01-10-15	48	Antonie kamerling	40
RTL 4	29-10-15	44	Chantal blijft slapen	32
RTL 4	02-10-15	95	Voice of holland the blind auditions	30
RTL 5	12-10-15	44	Hollands next top model	29
NPO 1	09-10-15	46	Flikken maastricht	28
RTL 4	02-10-15	23	Goede tijden slechte tijden	28
RTL 4	10-10-15	100	Dance dance dance	24
RTL 4	30-10-15	92	Voice of holland the battle	23
NPO 1	22-10-15	47	Overspel	22

AGE 50+

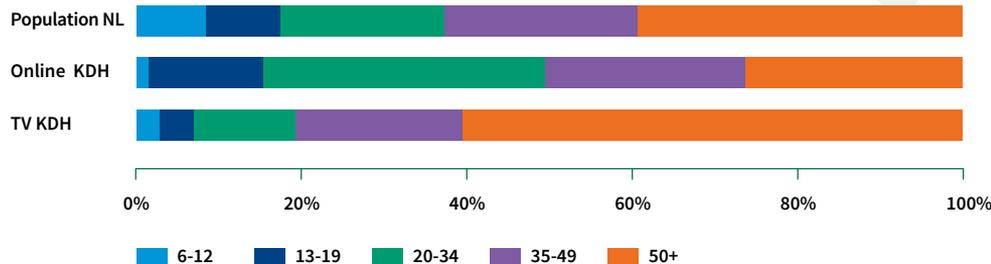
CHANNEL	DATE	LENGTH (MIN)	TITLE	KDH000 ONLINE
RTL 4	29-10-15	44	Chantal blijft slapen	27
NPO 2	22-10-15	42	Sterren op het doek	26
RTL 4	02-10-15	23	Goede tijden slechte tijden	26
Net 5	14-10-15	41	Meiden van de herengracht	25
RTL 5	29-10-15	63	Expeditie robinson 2015	24
NPO 3	11-10-15	48	Penoza 4	24
NPO 1	23-10-15	51	Flikken maastricht	23
RTL 7	30-10-15	78	Voetbal inside	22
RTL 5	13-10-15	43	Andy en melisa huwelijk in steigers	21
NPO 1	29-10-15	47	Overspel	21

VIEWERS' PROFILE ONLINE VS TV SET

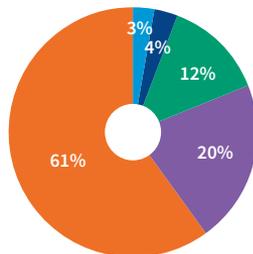
The new data can be used to produce target group analyses. Target groups are based upon a large number of background characteristics. As such, we can determine the profile of persons who view online programmes.

As an example, we have made an analysis of every program that was offered and viewed in October, both online and on TV. Next, we have taken a look at the average ratings within target groups. It turns out that the profile of the 'online viewer' is much younger than the profile of the 'offline viewer'. Especially in the 13-19 and 20-34 age categories, the relative share of online programmes (ratings-wise) is much larger than in the age categories 6-12 and 50+.

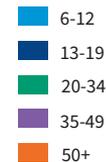
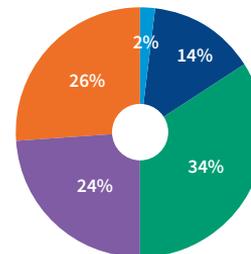
Share of age categories, based upon ratings numbers



Viewers' profile TV per age cat. in %



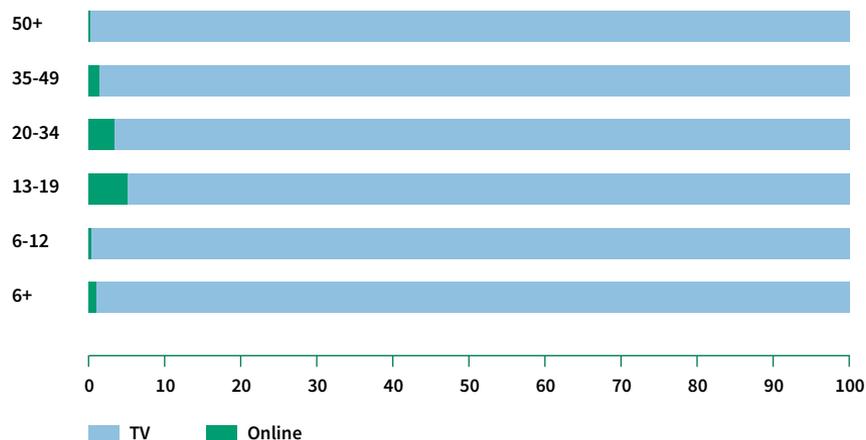
Viewers' profile online per age cat. in %



VIEWING TIME

The amount of time spent viewing programmes online is still modest in comparison to the time spent watching programmes on TV. Online viewing behaviour accounts for 1,3% of total viewing time. In some target groups, this percentage is higher; online accounts for 5,3% of total viewing time among persons of 13-19 years of age and 3,6% of total viewing time among persons of 20-34 years of age.

Share of online and TV viewing time (%) in total viewing time



TIME SHIFTED VIEWING

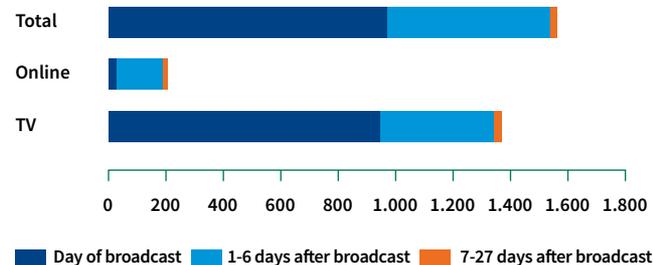
Next to regular TV viewing, we also measure time shifted viewing, e.g. of recorded programmes (HD, video, DVD, set top box). This behaviour is incorporated into the ‘Viewing Total’, as long as the time shifted viewing takes place within 7 days after the original broadcast. Now that it is possible to report on online viewing behaviour, we will – in due time – be able to combine every form of time shifted viewing (both on TV and online) into one single number. This is not yet possible, but will be further developed during Phase 2 of the SKO-VIM project.

At the moment, it is already possible to add up the average number of viewers on TV sets and the average number of online viewers.

To illustrate this, let’s take a look at the ‘Expeditie Robinson’ broadcast of October 1 2015. This was October’s most viewed online programme. On the day of broadcast, an average of 971.000 people watched the programme on TV; 24000 more watched the programme online. During the time shifted viewing period of 6 days, 561.000 more people viewed the programme, 161.000 of whom (=29%) watched the programme online. Total ratings for the Expeditie Robinson broadcast of October 1: 1.5 million viewers. 37% of all viewers watched the programme during the time shifted viewing period; 12% of all viewers watched the programme online.

It is also possible to utilise a longer time shifted viewing period: 7-27 days after the day of broadcast. Doing so results, on average, in 27000 extra viewers, half of whom watched the programme online.

Average number of viewers 6+ Expeditie Robinson October 1 2015



DAILY PATTERN ONLINE VIEWING BEHAVIOUR

Based upon the data, it is possible to make analyses that offer insight into the daily pattern of online viewing. The line graph on this page visualises the average reach per hour.

It distinguishes between average reach on a working day, a weekend day and an average day that is representative of a whole week.

Four (larger and smaller) peaks are visible:

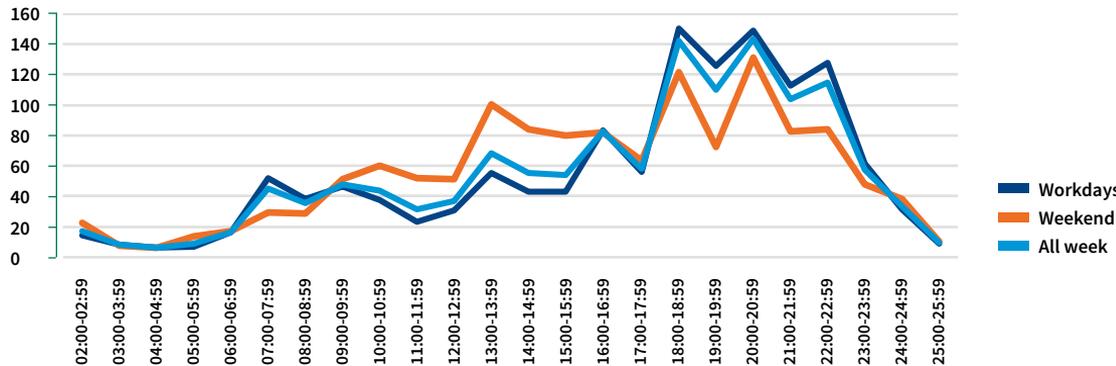
- between 07:00 and 08:00 (especially on working days)
- between 13:00 and 14:00 (especially in weekends)
- between 16:00 en 17:00 (especially on working days)
- between 18:00 and 23:00 (especially on working days)

On Saturday and Sunday, online programmes are viewed more often during the daytime than is the case on working days. This is to be expected of course, as most of the Dutch people are either

working or at school during working days.

During evenings, it is the other way around; on working days, more online content is viewed in the evenings than is the case on weekend days.

Average reach (*1.000) per hour 6+ (October 2015)



PREVIEWS

For the first time, we can report on the reach of 'previews'. Previews are online programmes that are available before the programme is scheduled for broadcast.

In October 2015, RTL and SBS offered 193 previews (NPO did not offer any). This is 2% of all the programmes that were available in that month.





DEFINITIONS

KDH	RAT%: Average percentage of the target group that watched a programme or programme publisher
KDH 000	RAT000: Average number of persons in the target group that watched a programme or programme publisher
REACH%	The percentage of viewers that watched a programme or range of programmes at least once (and for a given amount of time)
ABSOLUTE (000)	The absolute number of viewers that watched a programme or range of programmes at least once (and for a given amount of time)
SKO ONLINE PANEL	The panel was established in cooperation with the <i>Verenigde Internet Exploitanten (VINEX)</i> , United Internet Operators. The jointly managed panel is called NOBO: <i>Nederlands Online Bereik Onderzoek</i> , Dutch Online Reach Research. VINEX will use the online panel to report on websites and apps.

WHAT IS INCLUDED IN THE MEASUREMENT?

The measurement includes the viewing behaviour for all the available online content. Until 27 days after the day of broadcast, this content can be related to the original broadcast. Currently, only online ratings for NPO, RTL Netherlands and SBS Broadcasting programmes are reported. In due course, other participants will join, e.g. Discovery Networks, Disney, VIACOM, FOX International Channels Benelux and Sanoma. Starting on January 1 2016, SKO will supply the data on a daily basis. The package includes online data gathered since October 1 2015.

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