

AGF VIDEOFORSCHUNG

Video research in Germany – Status: 05/01/2022

AGF Videoforschung GmbH

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Reach research in the AGF System



A JIC IN THE FORM OF A GMBH

Shareholders and supporters of AGF Videoforschung GmbH



Reach research in the AGF System

PRINCIPLES OF AGF RESEARCH

Providing a standard for the German market

- Independent
- Neutral
- Transparent
- Open to all market players
- Without discrimination
- Comparable data
- Continuous further development
- Aligned along central requirements of the media and advertising markets



> 35 million euro research investments

Reach research in the AGF System

BIG PICTURE



**SINGLE
SOURCE**

AGF (VIDEO) PANEL

Complete capture of linear and non-linear usage on the big screen.

As complete as possible capture of the use of all video-capable devices by panel members, across all broadcasting channels and forms.

Desktop

Smart TV

Mobile

Game
consoles

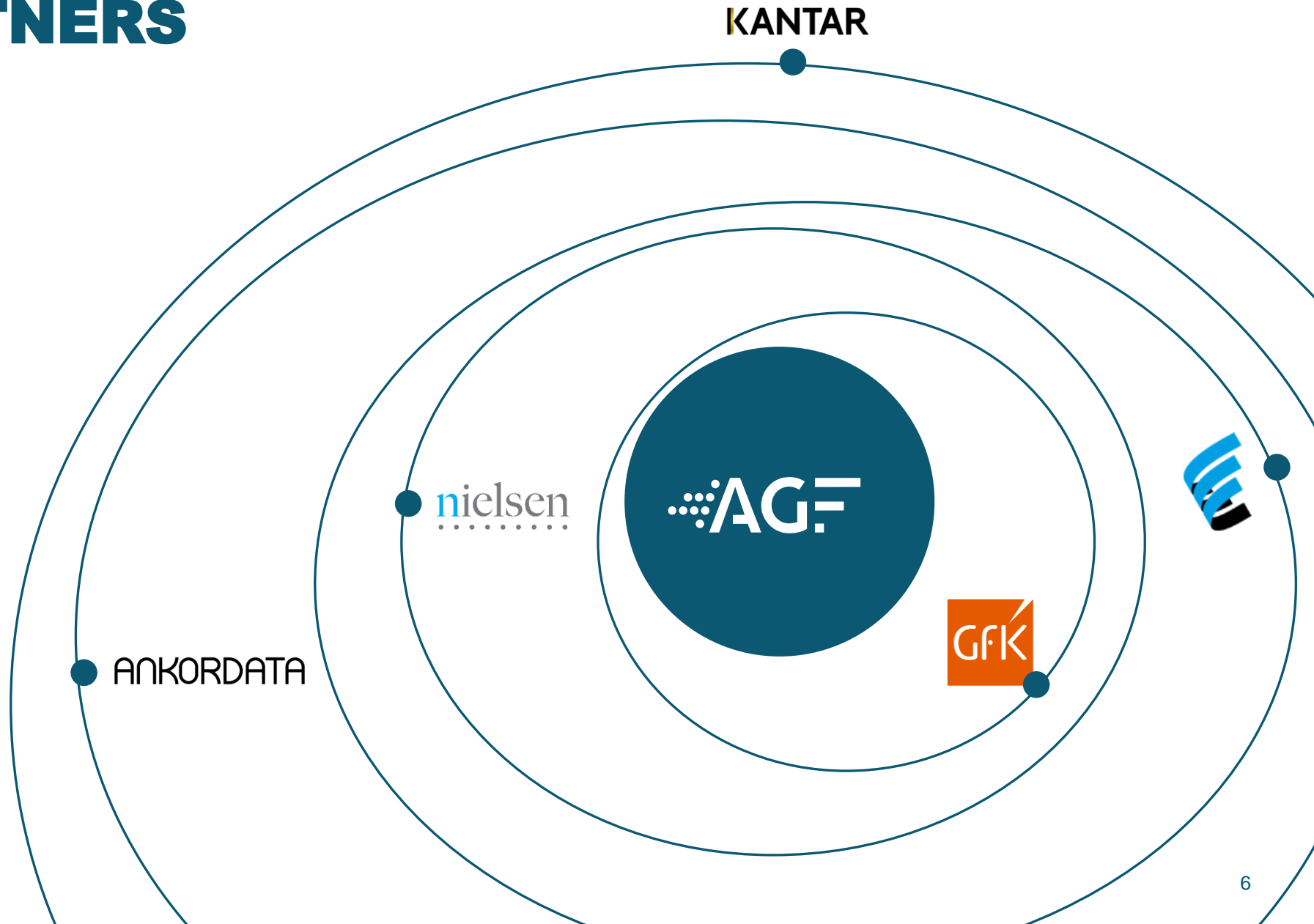
RETURN PATH
DATA

ONLINE PANELS
(mobile,
desktop)

OUT-OF-HOME
MEASUREMENT

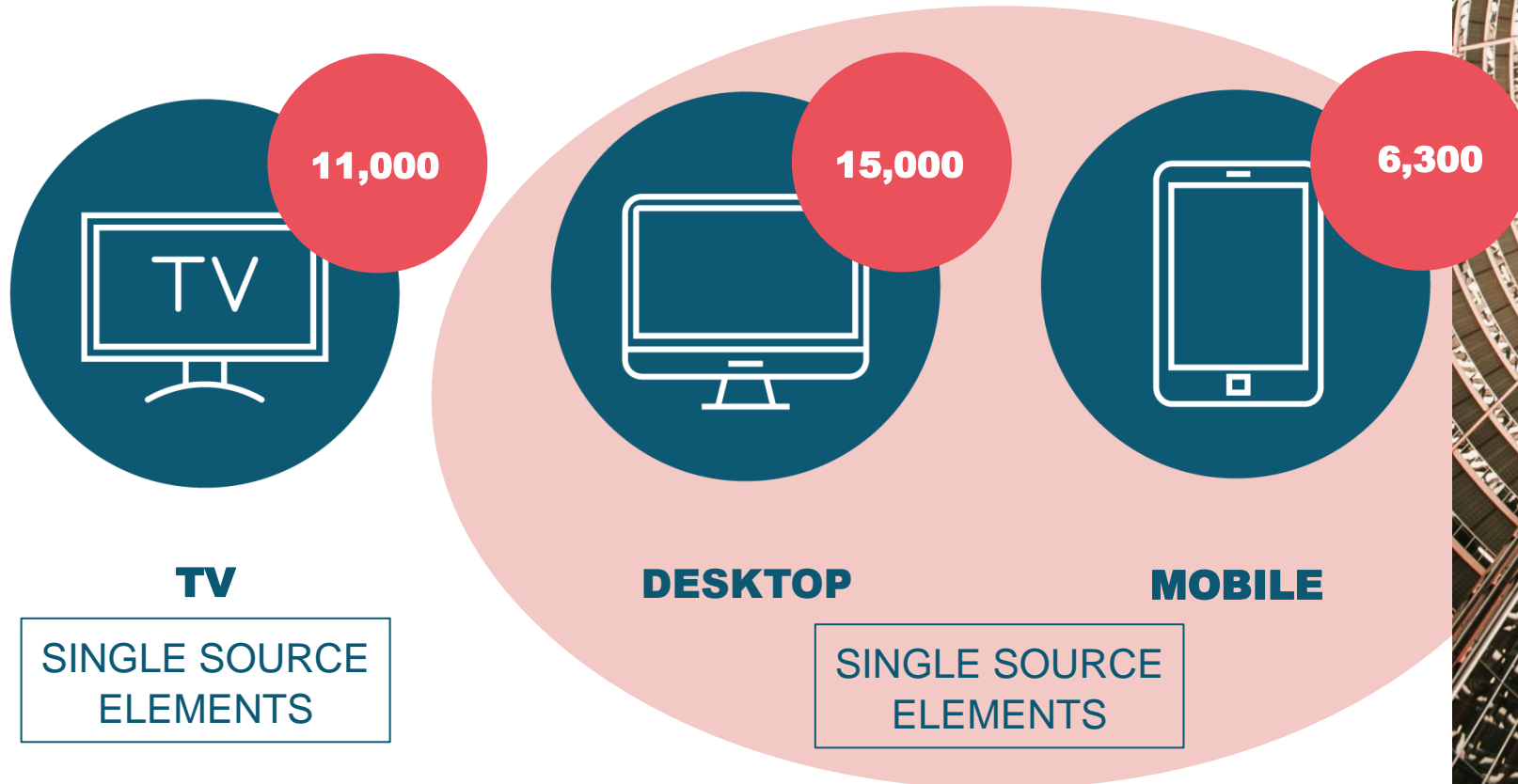
3RD PARTY
DATA

Reach research in the AGF System
CAPABLE PARTNERS



Reach research in the AGF System

AGF PANELS: “THE SOURCE OF TRUTH”



THE AGF PANEL

The AGF Panel

THE AGF PANEL

AGF PANEL

TV households in Germany
with a German-speaking
Main Income Earner (MIE).



38.773 mill.

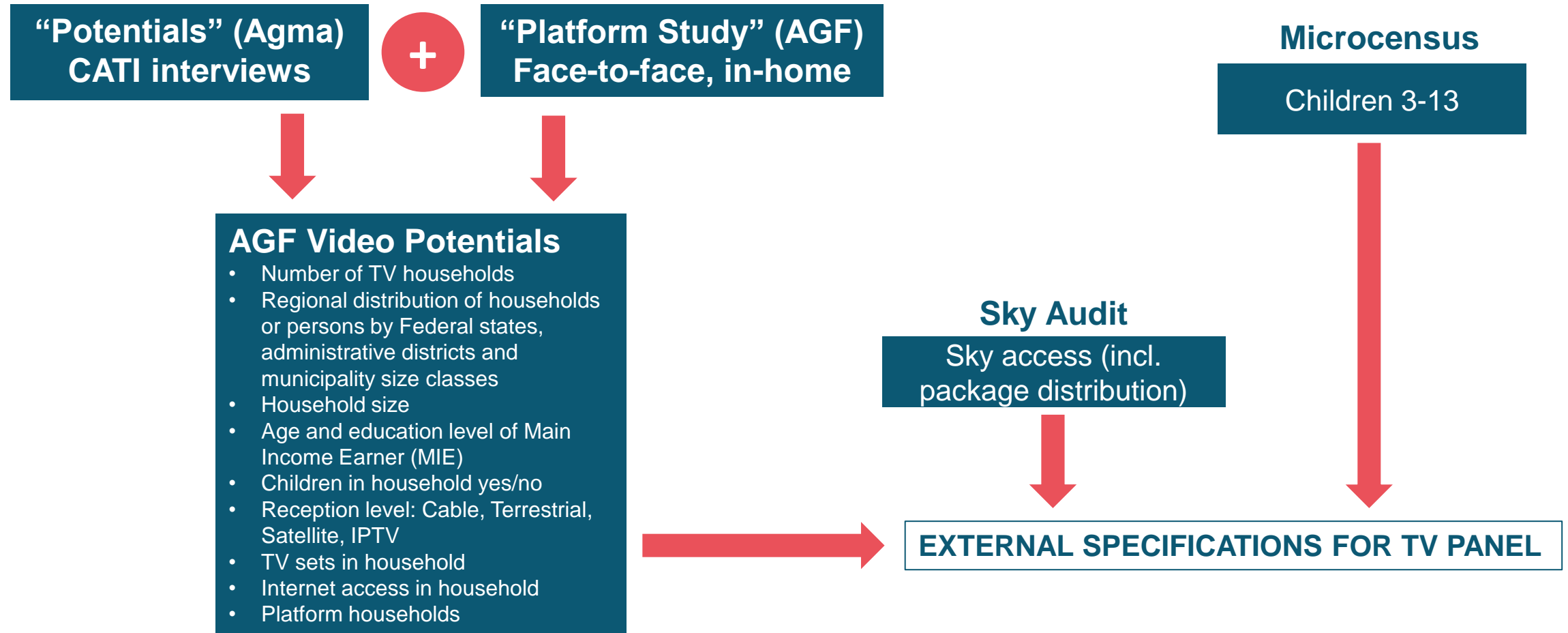


75.304 mill.

- 5,400 households with around 11,000 panelists, 8,500 systems
- Measurement (live, time-shifted usage) via TC UMX
- Recruiting: Random (Random Route / CATI) & Quota
- Capture of guest / out-of-home usage
- Addition of single source elements (AGF Smart Meter)
- Around 280 broadcasters



EXTERNAL SPECIFICATIONS (as of 01/01/2022)

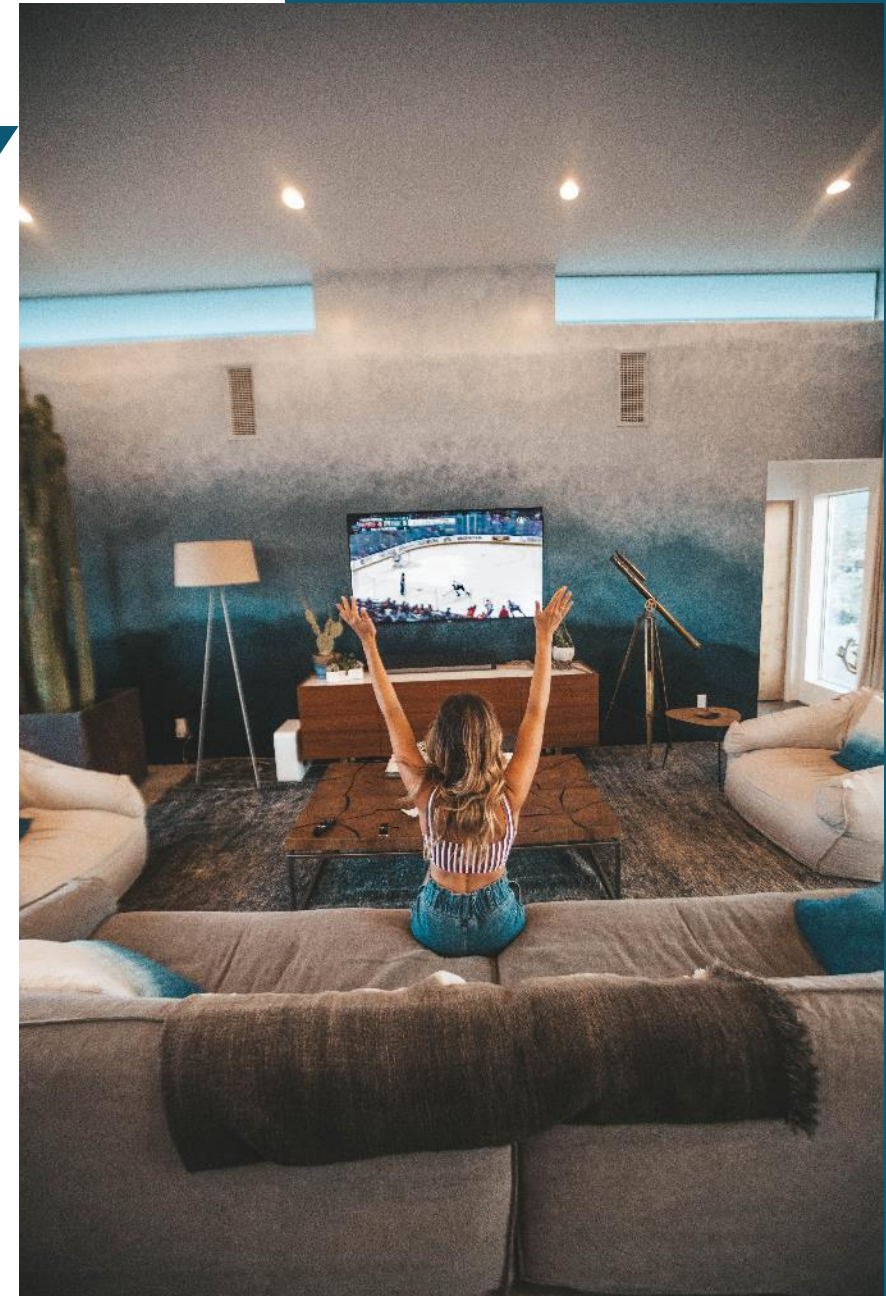
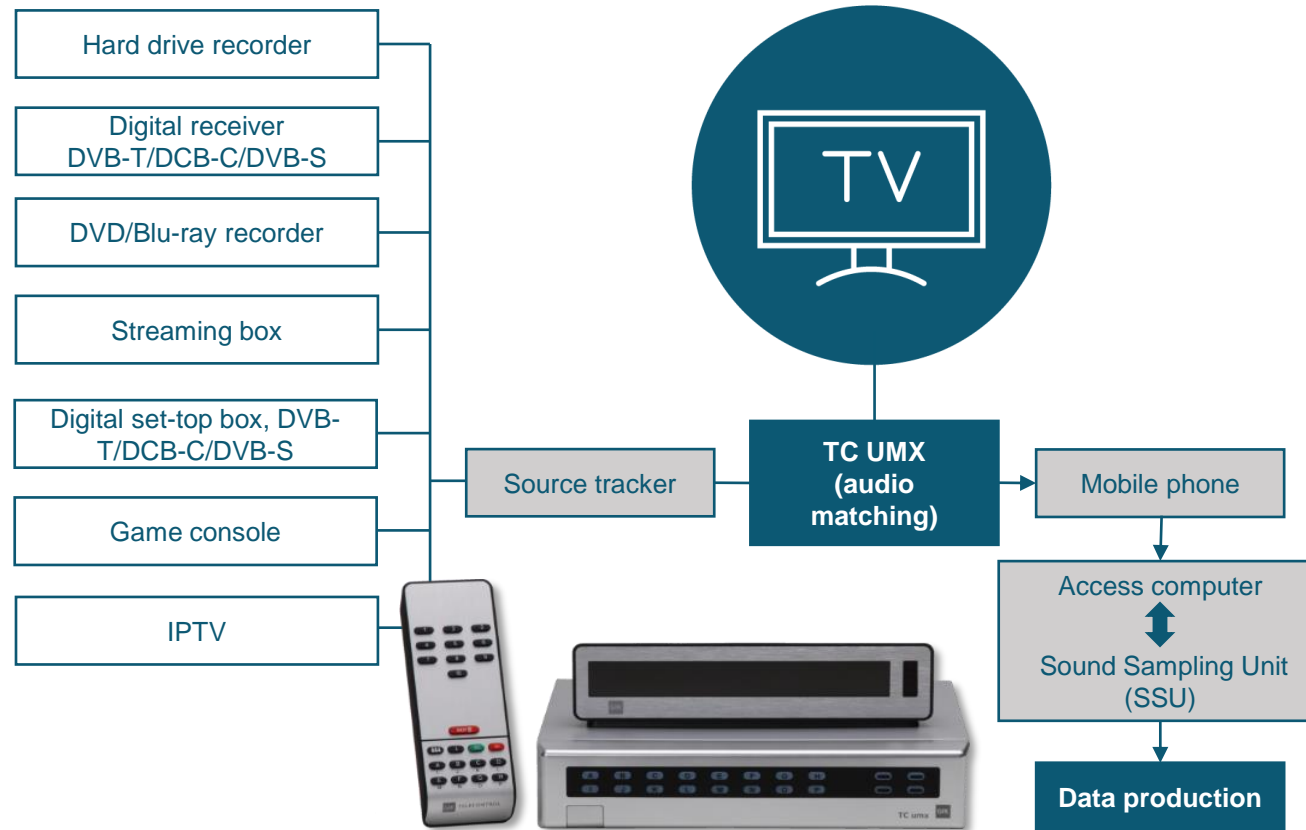


The AGF Panel

MEASUREMENT TECHNOLOGY

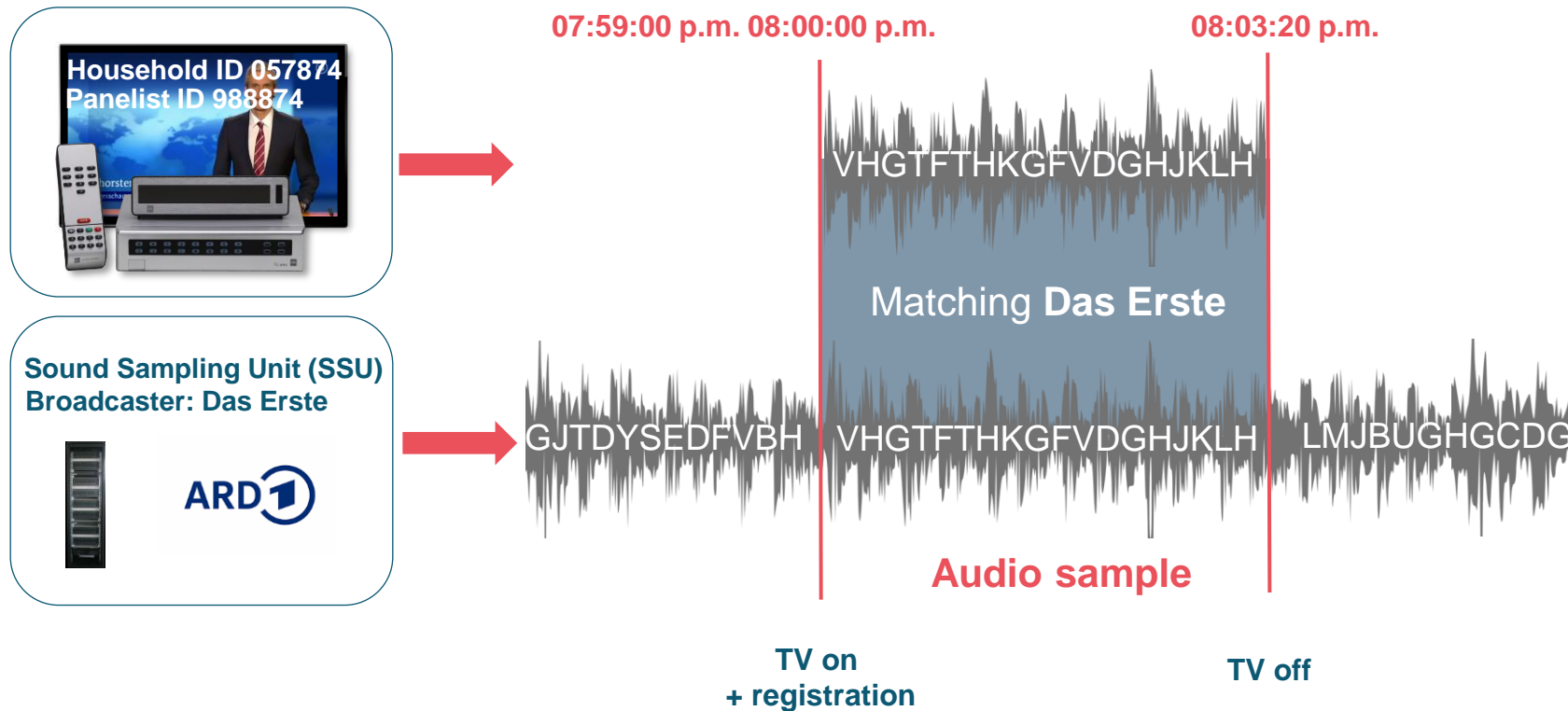
Measurement technology setup in households per TV set

External video sources



The AGF Panel

AUDIO MATCHING



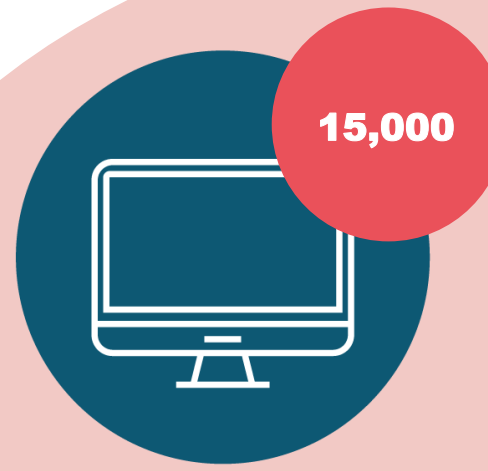
- Audio patterns are captured by the UMX and sent to the server
- The SSU references about 400 soundtracks
- A matching algorithm compares both samples for identity

MEASUREMENT TECHNOLOGIES: FIT FOR THE FUTURE



TV

- Audio matching (GfK)
- Watermarking (GfK)
- Measurement router (single source)



DESKTOP

- Nielsen Tagging (consentless)



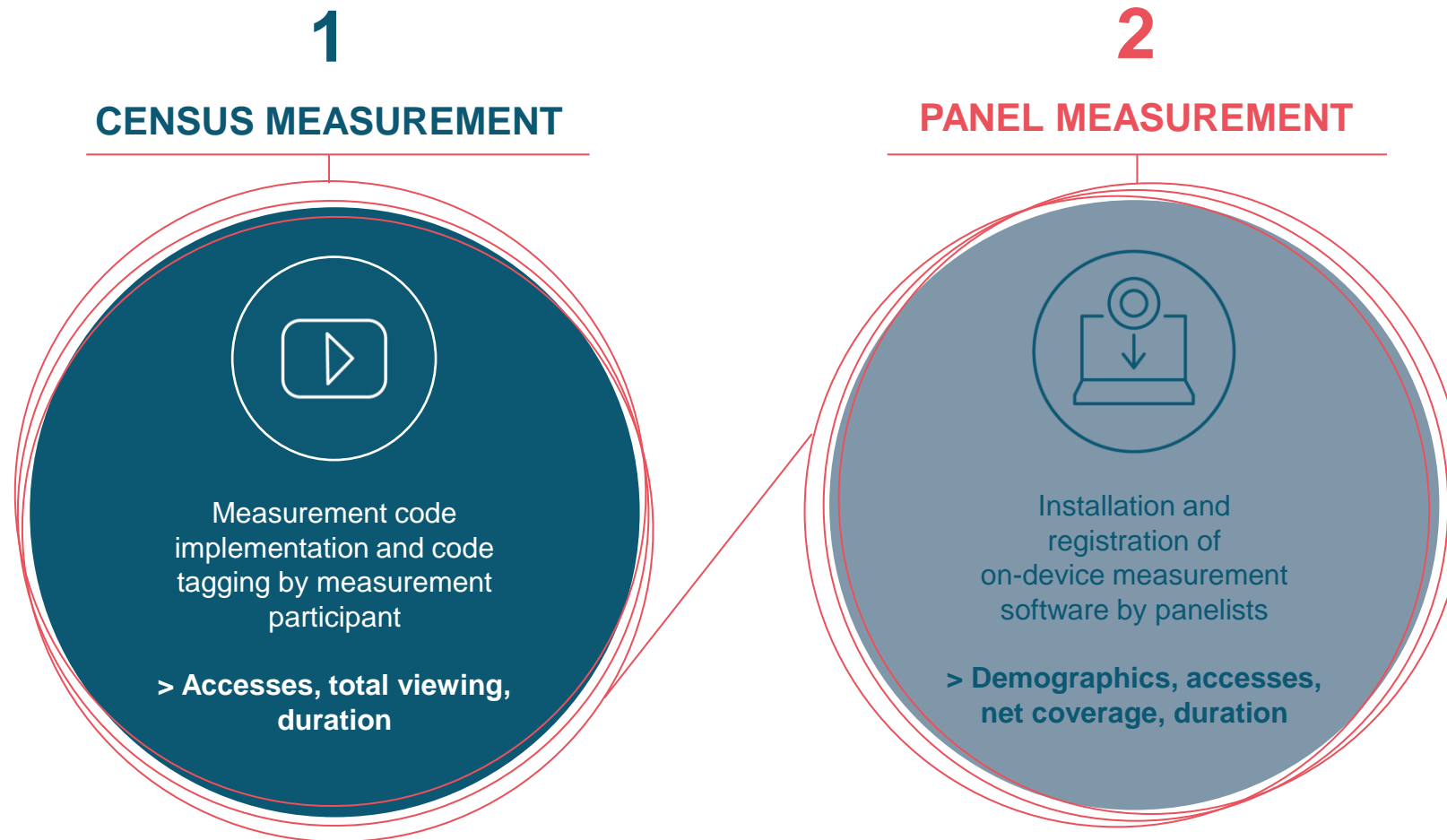
MOBILE

- Nielsen Tagging (consentless)

STREAMING

STREAMING MEASUREMENT

STREAMING MEASUREMENT: HYBRID MEASUREMENT APPROACH



Streaming measurement: Nielsen

THE DESKTOP PANEL



DESKTOP PANEL

Persons who in the previous four weeks used the internet (PC, laptop) at least once



56,249 mill.

- Active sample: 15,000 panelists (3+)
- Measurement via on-device meter and census data points
- Buildout of single source core DSK/MBL
- Calibration by census measurement
- Operating systems: Windows, MacOS
- Data merged to the TV panel since 01/2017

Streaming measurement: Nielsen



THE AGF MOBILE PANEL

MOBILE PANEL

Persons who in the previous four weeks used the internet while mobile (smartphone, table) at least once



56,421 mill.

- 6,300 panelists (18+)
- App and browser measurement
- Smartphones and tablets (iOS and Android)
- Recruiting: web-based, also in desktop panel
- Buildout of single source core DSK/MBL
- In-home & out-of-home measurement
- Integrated in the data production process since 3/19

Streaming measurement

ROUTER MEASUREMENT: AGF SMART METER

Objective of AGF Smart Meter:

- Measurement of all internet-capable devices via router technology
 - > Single source data for TV and streaming
- Link to streaming measurement
- Passive measurement of offers at high aggregates that are not part of AGF streaming measurement.

Router rollout:

- Currently >2,300 households (status: 01/01/2022)
- 3,600 routers by the end of 2024

For more details and the current report:
www.agf.de/agf-smart-meter



SAMPLE MONTHLY AGF SMART METER REPORT

December 2021

Total TV content usage* and use of selected digital platforms on smart-TVs (A14+)

AVG. VIEWING DURATION (MIN.)/DAY

	TV-CONTENT	DIGITAL PLATFORMS ON SMART TVS				
	Total	Netflix	Prime-Video	YouTube	Disney+	Other
A 14+	239	12	5	4	1	4
A 14-29	62	18	5	6	2	2
A 30-49	161	13	7	4	1	4
A 50+	355	7	3	2	0	5
A 14-49	120	15	6	5	1	3
M 14+	233	11	5	5	1	4
F 14+	245	13	5	3	1	4



Source: AGF Videoforschung in cooperation with GfK, DAP, Nielsen, ANKORDATA; VIDEOSCOPE 1.4, 01/12/21-31/12/2021, market standard: Video, Data package 7318 of 04/01/2022

Representation of platforms on smart TV from AGF Smart Meter pilot project; own calculations

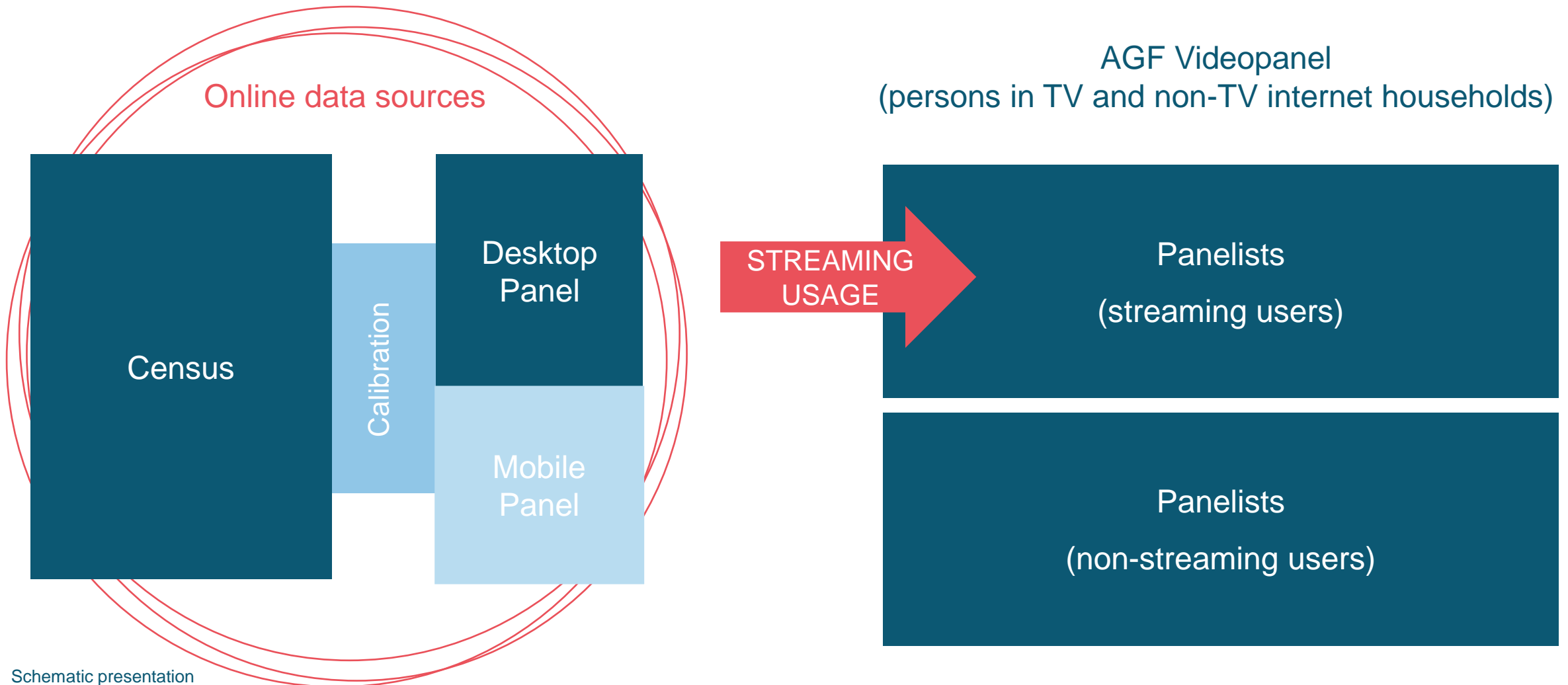
*All terminal devices

For the current report:
www.agf.de/agf-smart-meter

CONVERGENCE DATA

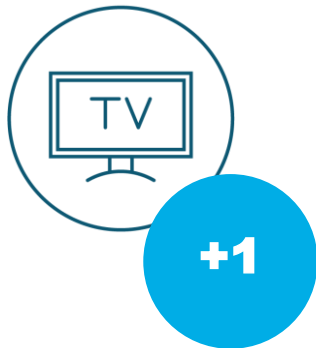
Convergence data

FUSION PROCESS



DAILY CONVERGENCE DATA

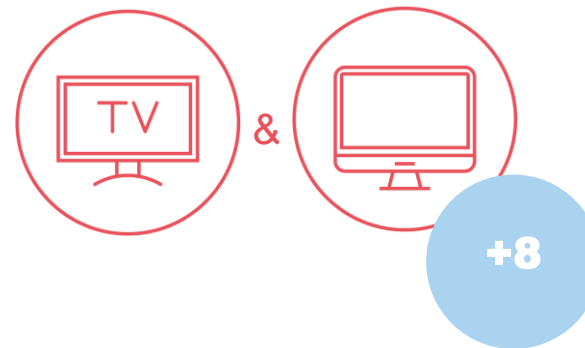
TV viewing data,
provisional



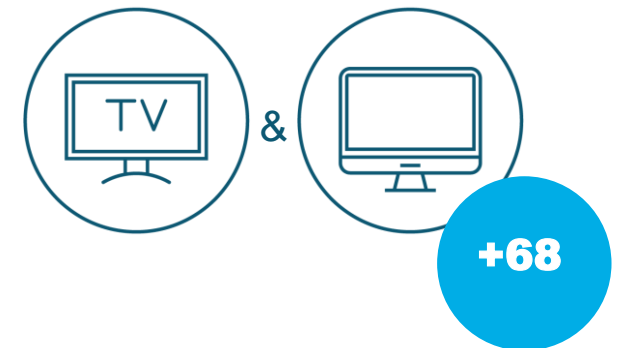
TV viewing data, final



Viewing data, convergent
(TV & streaming)



Consolidated
viewing data



Convergence data

SAMPLE EVALUATION STREAMING HITLISTS

Top 20
always
on the 16th of
the following
month on **agf.de**

HITLIST NOVEMBER 2021

Top 20: Streaming of TV broadcasts | ARD | Total viewers

Broadcast on linear TV						Net reach (mill)	
Rank	Date	Broadcaster	Title	Starting time	Duration (hh:mm)	Streaming only	TV + streaming
1	12.11.2021	NDR Fernsehen	White Sands - Strand der Geheimnisse Folge 1	03:00	00:25	0,910	1,019
2	18.11.2021	ARD Das Erste	Der lange Abschied - Der Usedom-Krimi	20:34	01:28	0,622	13,363
3	03.11.2021	ARD Das Erste	Zero	20:15	01:28	0,620	14,316
4	17.11.2021	ARD Das Erste	Faltenfrei	20:14	01:28	0,605	15,564
5	12.11.2021	NDR Fernsehen	White Sands - Strand der Geheimnisse Folge 2	03:27	00:40	0,549	0,669
...

Source: AGF Videoforschung in cooperation with GfK, DAP, Nielsen, ANKORDATA; VIDEOSCOPE 1.4, 01/11/2021-30/11/2021, Market standard: Bewegtbild (Video), Data package 7177 from 15/12/2021

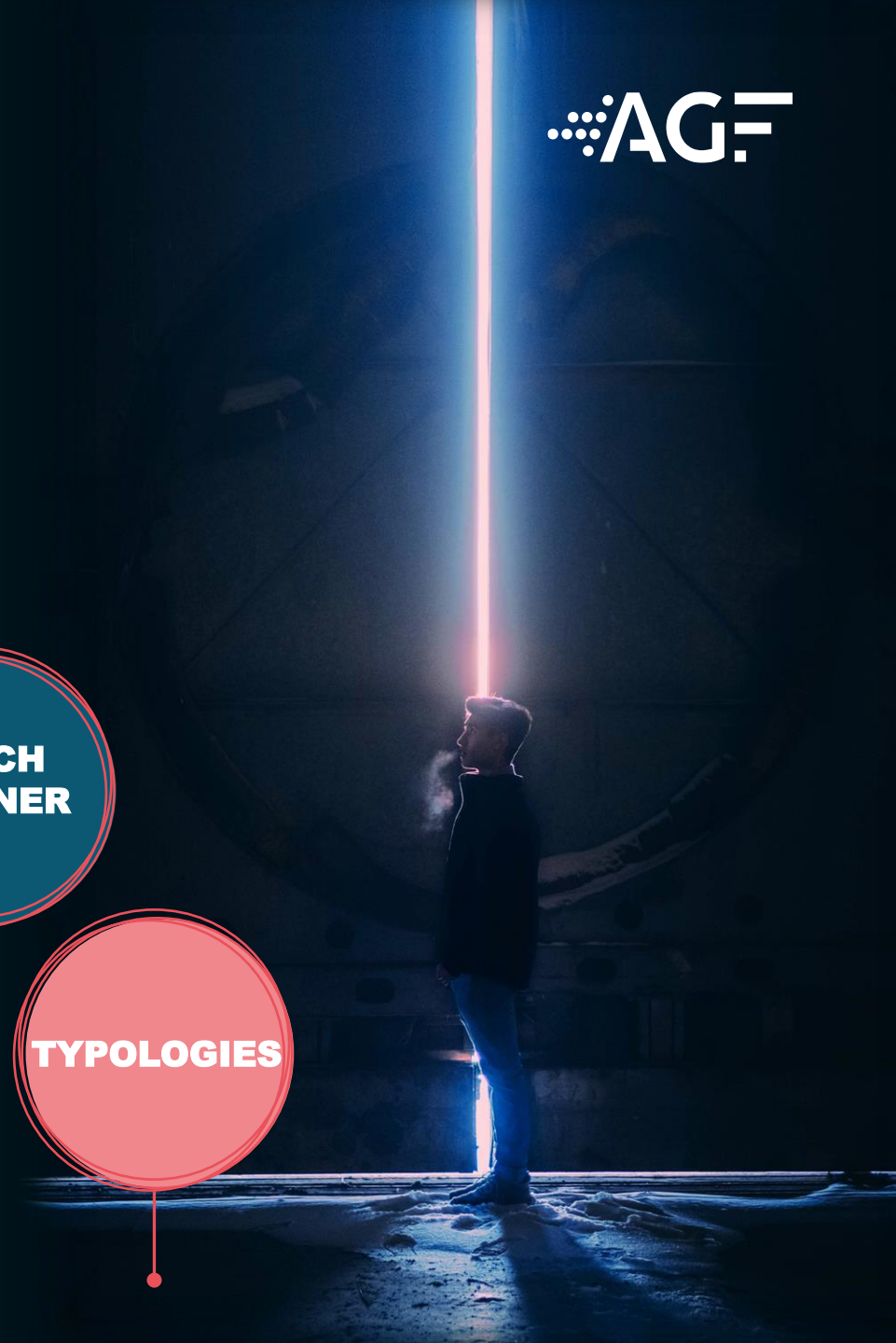
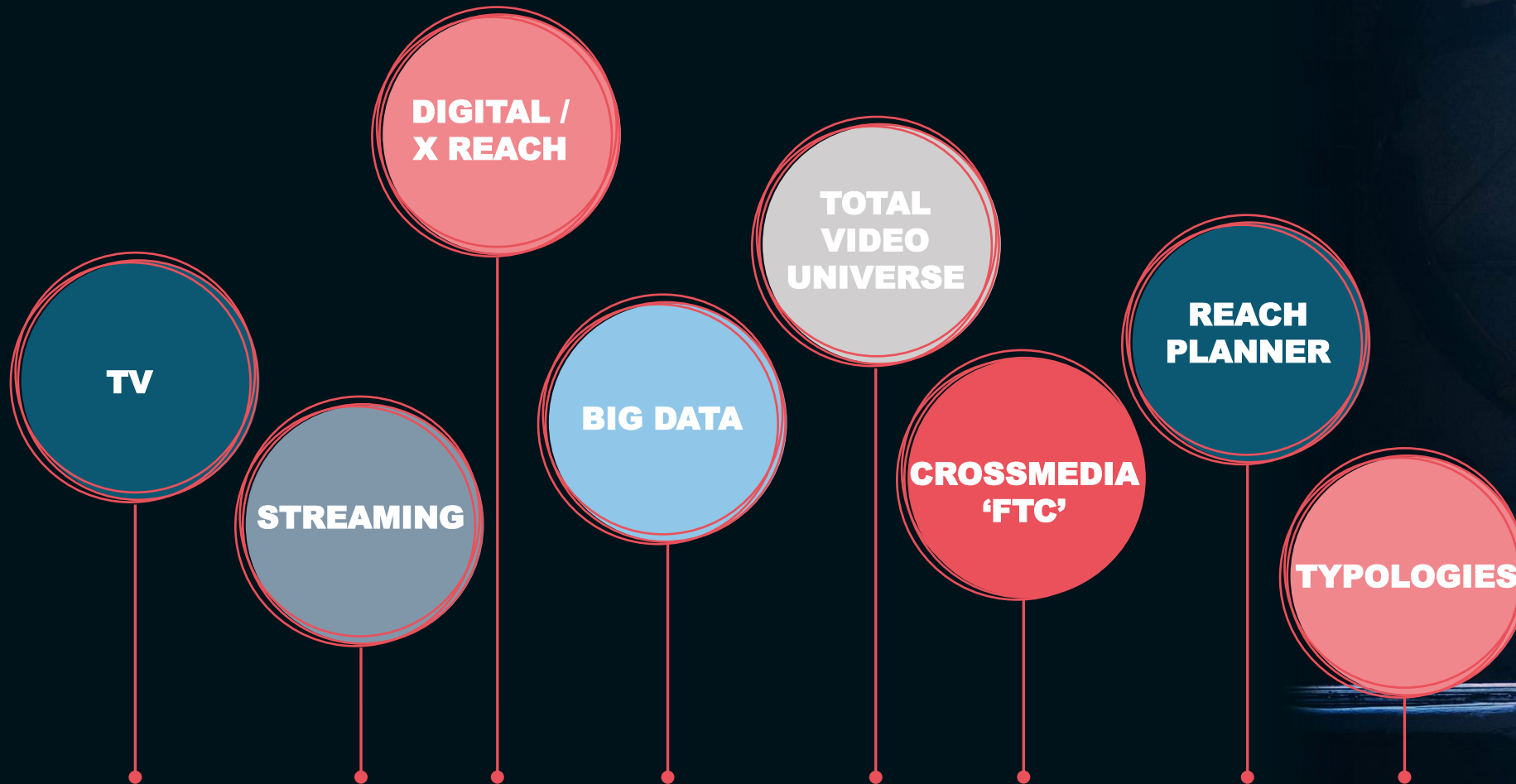
Current streaming hitlists:
www.agf.de/data/video-streaming-data

CURRENT PROJECTS

Current projects



ALONG THE USER JOURNEY



Contact

www.agf.de

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AGF Videoforschung GmbH

Gärtnerweg 4 – 8 | 60322 Frankfurt am Main, Germany

T +49 69 955 260 55 | info@agf.de