

# AGF VIDEOFORSCHUNG

Video research in Germany

Frankfurt, August 2022

AGF Videoforschung GmbH

# CONTENTS

1. REACH RESEARCH IN THE AGF SYSTEM
2. THE AGF PANEL
3. STREAMING MEASUREMENT
4. CONVERGENCE DATA
5. CURRENT PROJECTS
6. EVALUATION SOFTWARE
7. FURTHER TOPICS

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

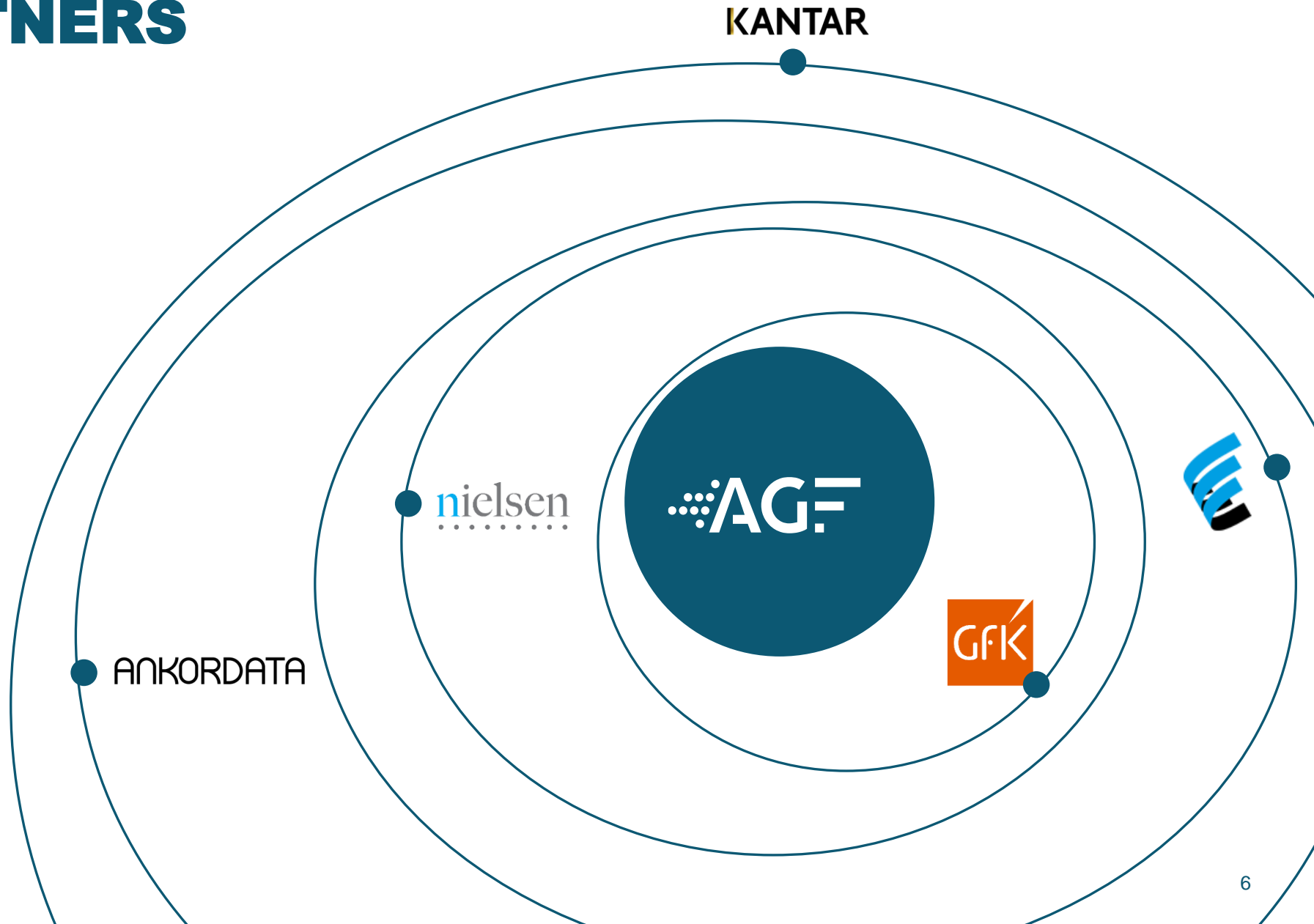
RETURN PATH  
DATA

ONLINE PANELS  
(mobile,  
desktop)

OUT-OF-HOME  
MEASUREMENT

3RD PARTY  
DATA

Reach research in the AGF System  
**CAPABLE PARTNERS**



# THE AGF PANEL



**The AGF Panel**

# THE AGF PANEL

## AGF PANEL

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



**38.777 mill.**



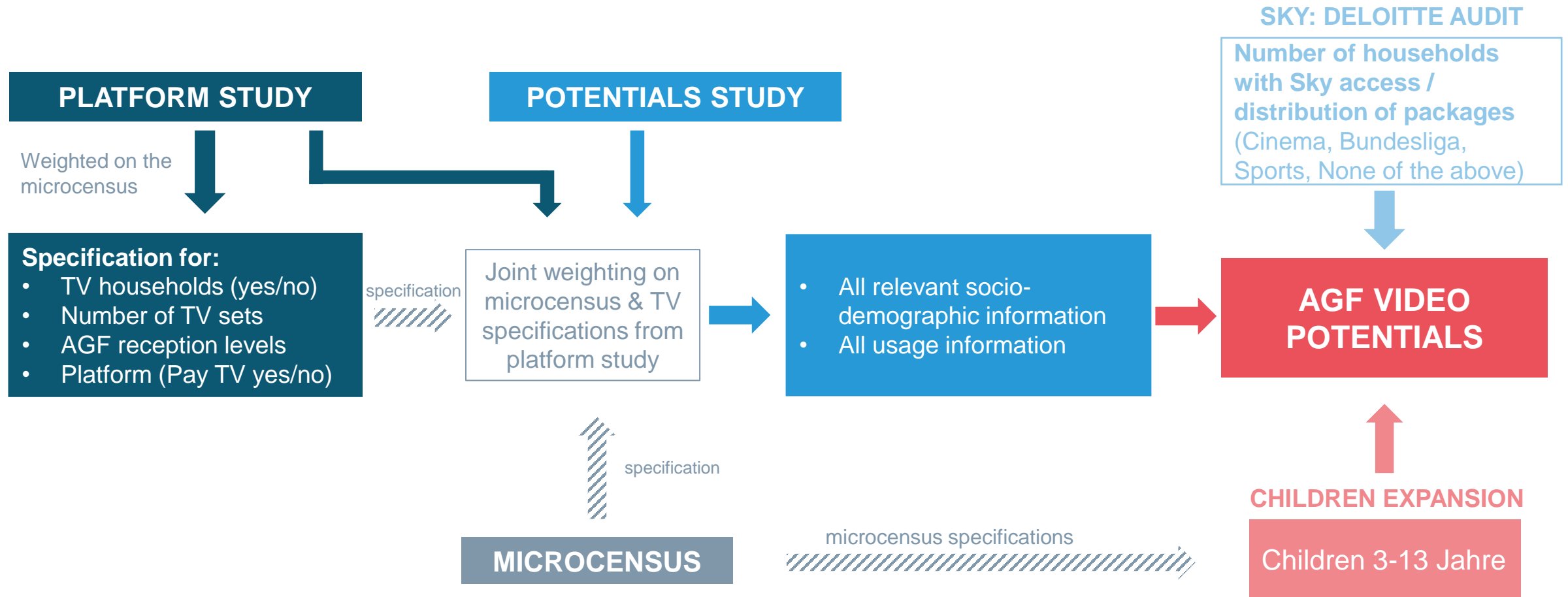
**76.577 mill.**

- 5,299 households with around 11,000 panelists, 8,500 systems
- Recruiting: Random (Random Route / CATI) & Quota
- Measurement (live, time-shifted usage) via TC UMX
- Capture of guest / out-of-home usage
- Addition of single source elements (AGF Smart Meter)
- Around 280 broadcasters





# AGF VIDEO POTENTIALS

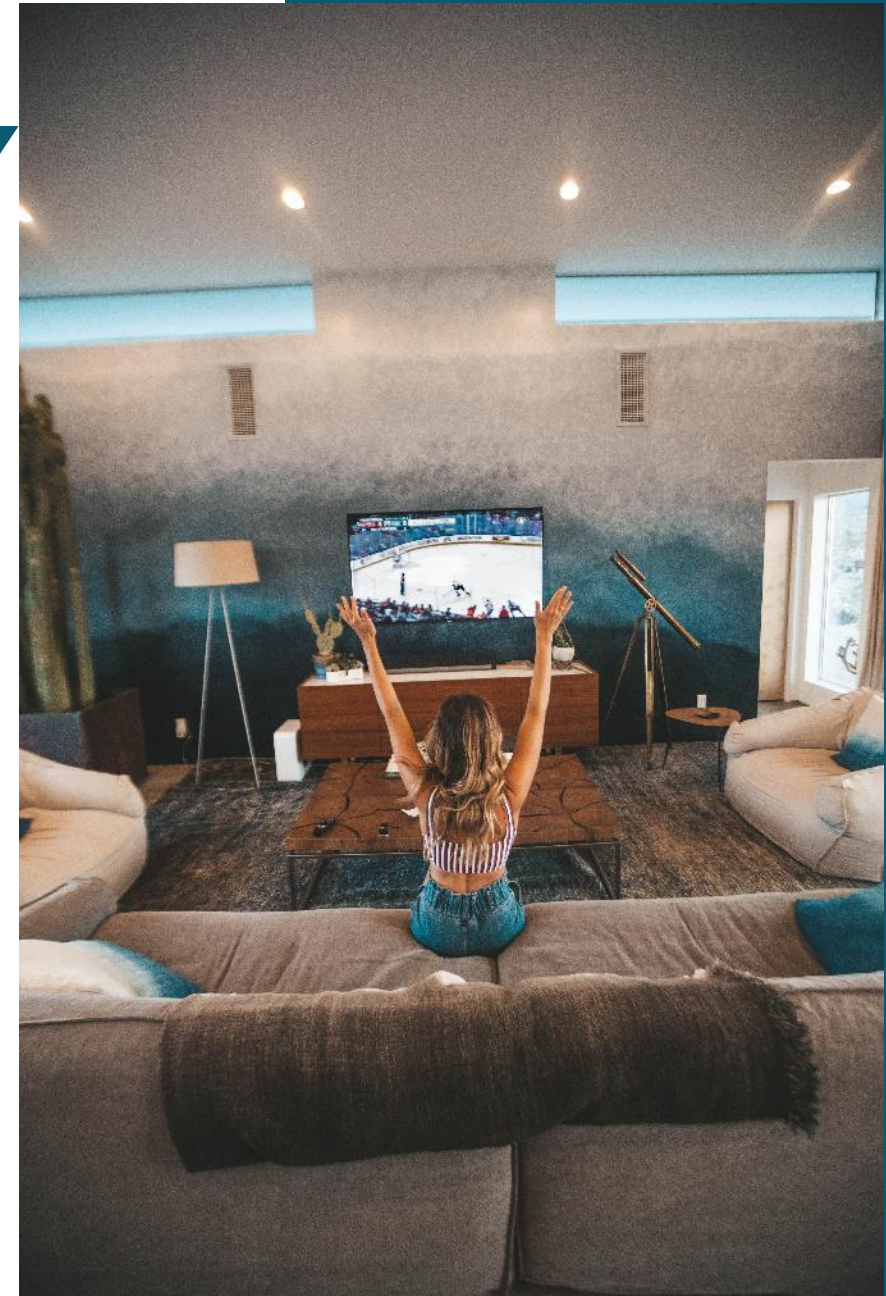
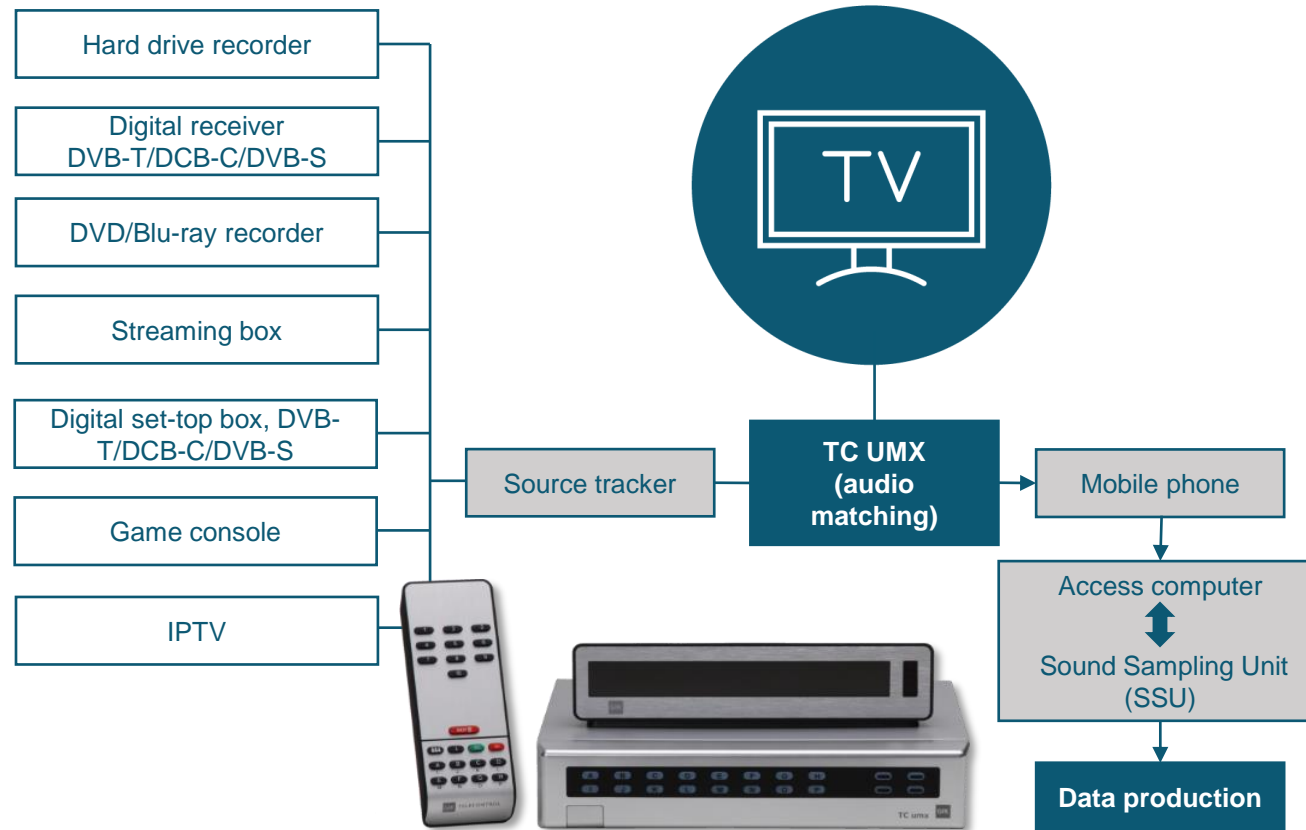


## The AGF Panel

# MEASUREMENT TECHNOLOGY

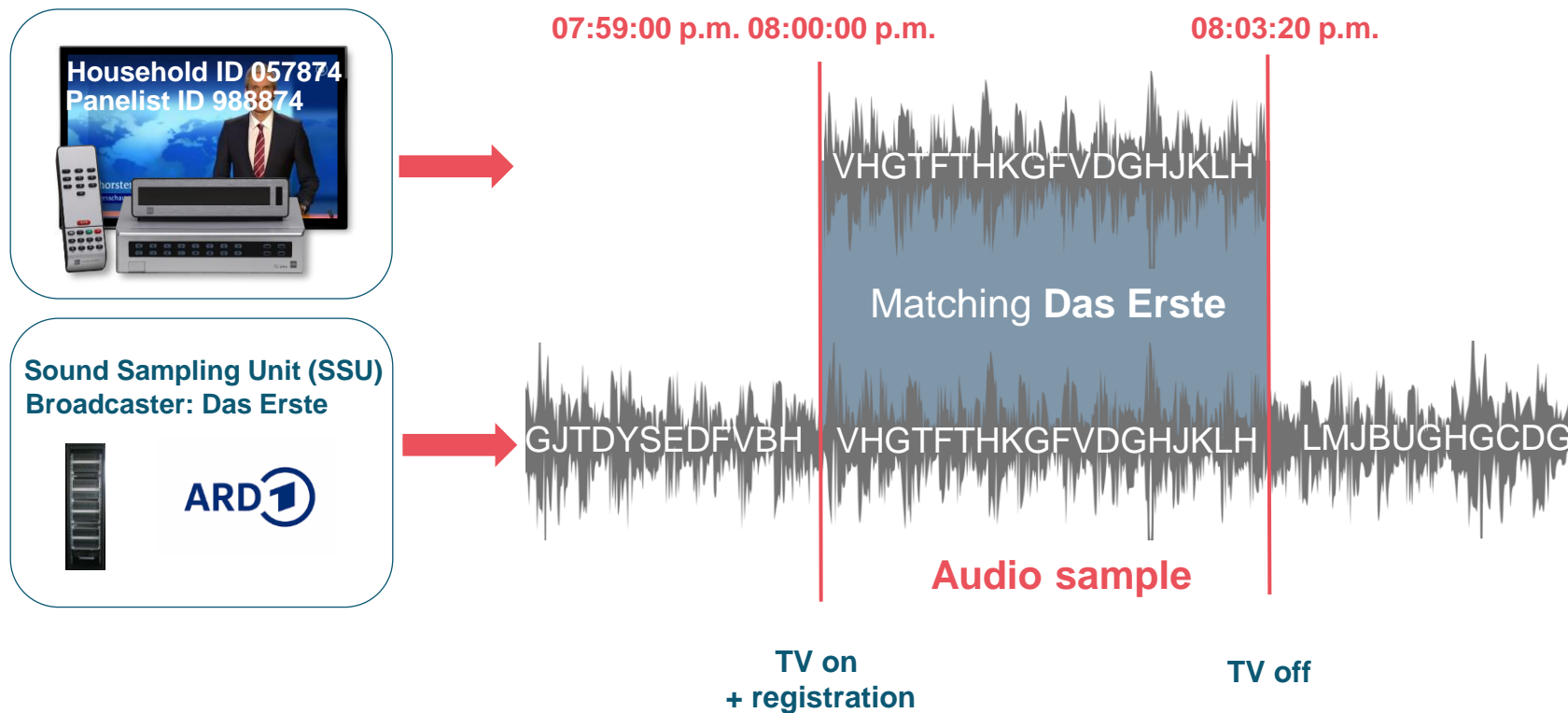
Measurement technology setup in households per TV set

External video sources



# The AGF Panel

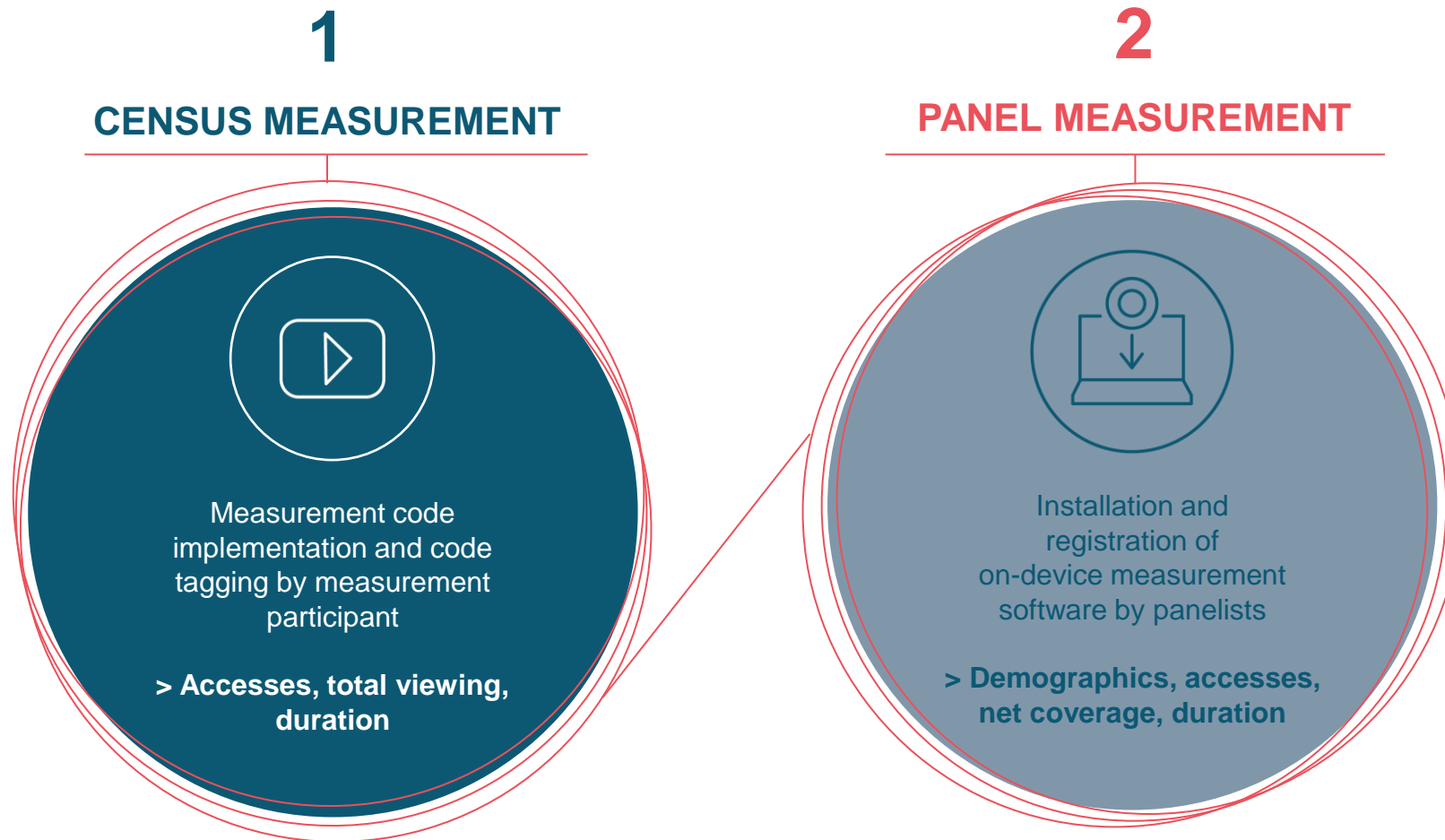
## AUDIO MATCHING



- 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

# 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



**55,115 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



# THE AGF MOBILE PANEL

## MOBILE PANEL

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



**56,459 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: AGF Smart Meter**

# **ROUTER MEASUREMENT: AGF SMART METER**

## Single Source - Expansion

- 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
- AGF Panel:
  - Until 31/12/2024: At least 3,600 households measured digitally every day (router)
  - Currently >2,900 households (status 01/01/2023)

More information and current report:  
[www.agf.de/daten/agf-smart-meter](http://www.agf.de/daten/agf-smart-meter)

## Streaming measurement: AGF Smart Meter

# VIEWING IN SELECTED TARGET GROUPS

**December 2021:** Total use of selected digital platforms on smart TVs (A14+)

AVG. VIEWING DURATION (MIN.)/DAY

### DIGITALE PLATTFORMS ON SMART TVS

	Netflix	Amazon	YouTube	Disney+
E 14+	10	4	4	1
E 14-29	15	4	8	2
E 30-49	14	6	6	3
E 50+	5	3	2	0
E 14-49	14	5	6	3
M 14+	9	4	5	1
F 14+	10	4	3	1

Source: AGF Videoforschung in cooperation with GfK; VIDEOSCOPE 1.4, 01.12.2022-31.12.2022, market standard: TVMapping of platforms on smart TV from AGF smart meter pilot project; Own calculations



# CONVERGENCE DATA

# FUSION PROCESS

## Online Panels

- Measured streaming usage from the desktop and mobile panel

## AGF Panel

- Weighted AGF panel consisting of persons in TV and non-TV HH
- Transfer of real streaming usage to onliners in the AGF panel

## AGF Panel

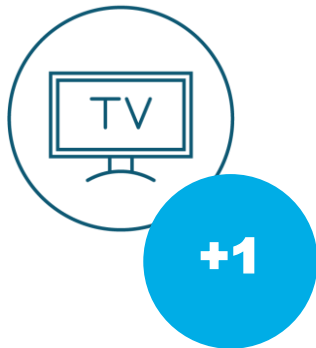
- Weighted AGF panel consisting of people in TV and non-TV HH with TV and streaming usage as convergent dataset

**Fusion**  
of streaming usage

**Calibration**  
according to census & model

# DAILY CONVERGENCE DATA

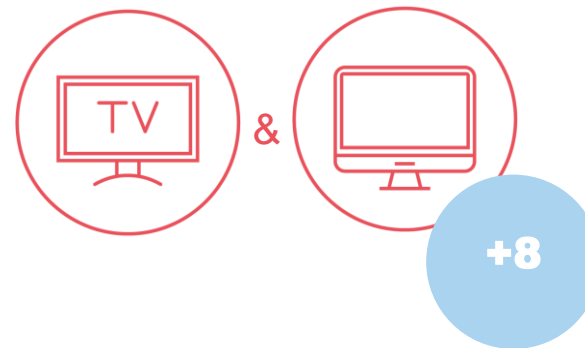
TV viewing data,  
provisional



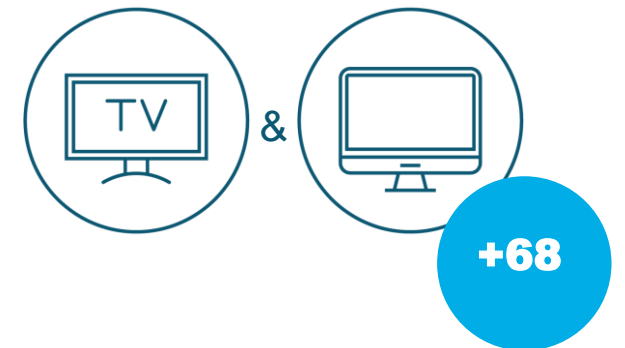
TV viewing data, final



Viewing data, convergent  
(TV & streaming)



Consolidated  
viewing data





# EVALUATION SOFTWARE

# (NEW) SOFTWARE SOLUTIONS FROM AGF



**AGF SCOPE** was developed as a browser-based web application by AGF Videoforschung to evaluate television, streaming and moving image usage behavior.

This means that AGF SCOPE can be accessed at any time and from anywhere, as long as there is a connection to the Internet.

It will replace AGF VIDEOSCOPE as the leading reference system in the future.



**TV CONTROL** is available as AGF Videoforschung software for the integrated planning and control of TV advertising campaigns.

Video standard as market standard is also provided in TV Control.

It is possible to choose between TV as market standard and Video standard as market standard.



**REACH PLANNER** is a newly developed web-based AGF planning tool for cross-media reach in the market standard moving image.

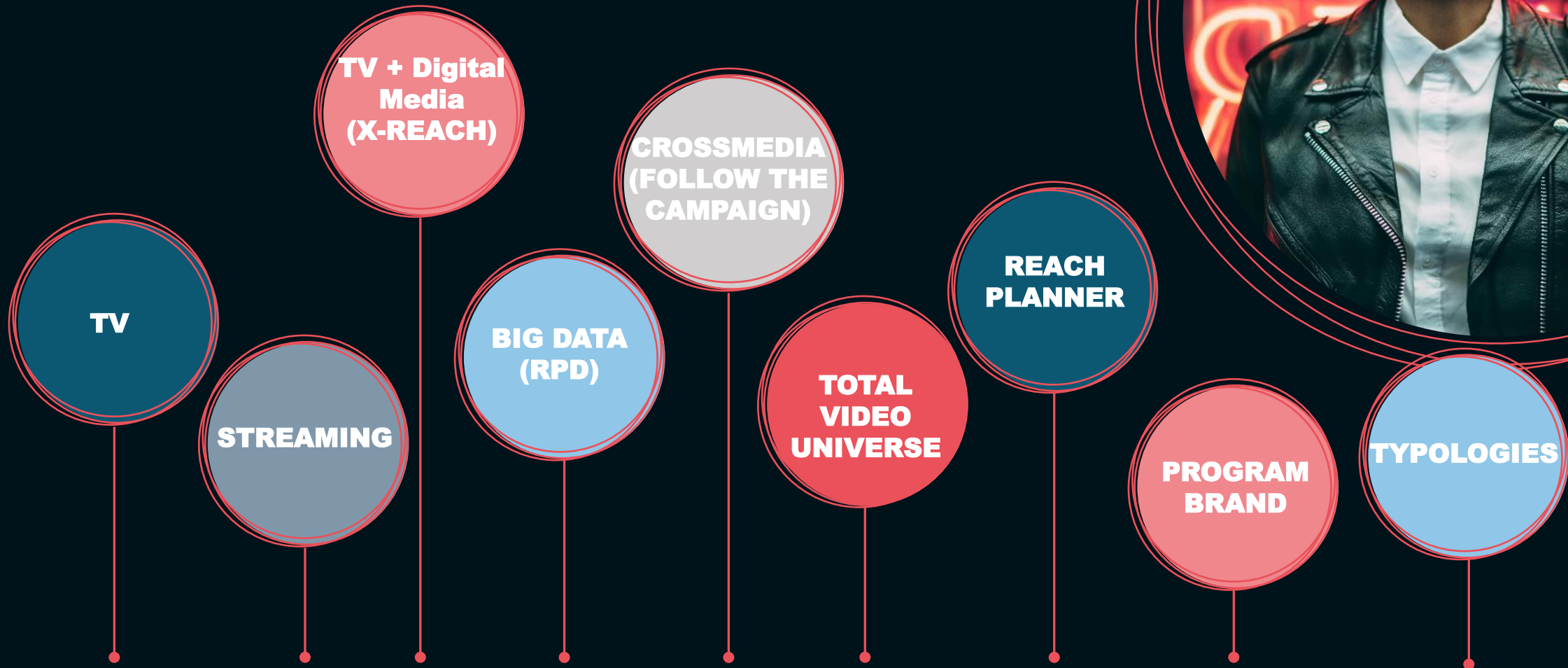
Strategic rough planning tool for forecasting campaign reach and cost planning for TV and streaming.

Integration of other measurement data sets possible.

# CURRENT PROJECTS

**Current projects**

# ALONG THE USER JOURNEY



# FURTHER TOPICS

## Further topics

# CURRENT PRESS RELEASES

[TV Moments 2022: Ukraine War, Women's Football and Farewell to the Queen \(05/01/2023\)](#)

[Internet usage on Smart TVs is growing significantly \(14/12/2022\)](#)

[AGF FORUM 2022: Reach research for the cross-media future \(16/09/2022\)](#)

[German households spend an average of EUR 22 per month on streaming services \(13/09/2022\)](#)

[YouTube usage sinks to pre-pandemic level \(07/07/2022\)](#)

[AGF joins Media Rating Council \(26/04/2022\)](#)

[More press releases](#)

[AGF Viewtime](#)





# Contact

[www.agf.de](http://www.agf.de)

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