



# AGF VIDEOFORSCHUNG

Video research in Germany

Frankfurt, January 2024

AGF Videoforschung GmbH

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Reach research in the AGF system



# VIDEO JICS IN EUROPE



Reach research in the AGF System



# A JIC IN THE LEGAL 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 with central requirements of the media and advertising markets

**> 40 million euro research investments**



Reach research in the AGF System

# BIG PICTURE



**SINGLE  
SOURCE**

## AGF (VIDEO) PANEL

Complete capture of linear and non-linear TV usage.

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

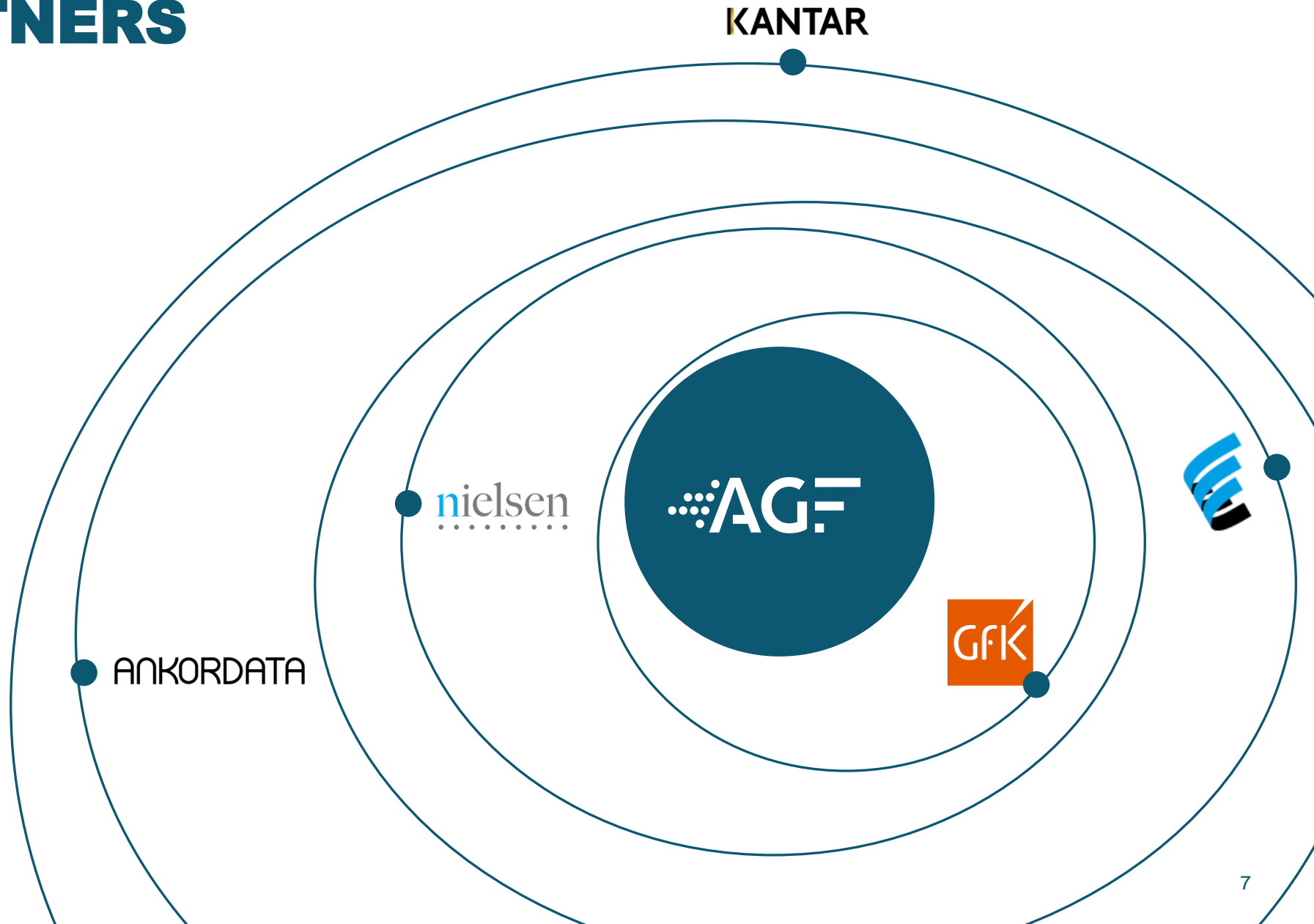
RETURN PATH DATA

ONLINE PANELS  
(mobile, desktop)

OUT-OF-HOME MEASUREMENT

3RD PARTY DATA

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



# 2. THE AGF PANEL

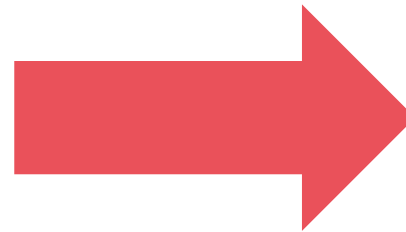


# FROM TV PANEL TO AGF PANEL



## TV PANEL

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



## AGF PANEL

TV and non-TV households in Germany  
with a German-speaking Main Income  
Person (MIP)

The AGF Panel

# THE AGF PANEL



## AGF PANEL

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



**40.478 million**



**78,271 million**

- 5,400 households with around 11,000 panelists, 8,500 systems
- Recruiting: Random (Random Route / CATI) & Online
- 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

# UNIVERSE IN THE MARKET STANDARDS

## TV HOUSEHOLDS



 38.930 million  
 75.546 million

## NON-TV HOUSEHOLDS



 1.547 million  
 2.725 million

## AGF HOUSEHOLDS



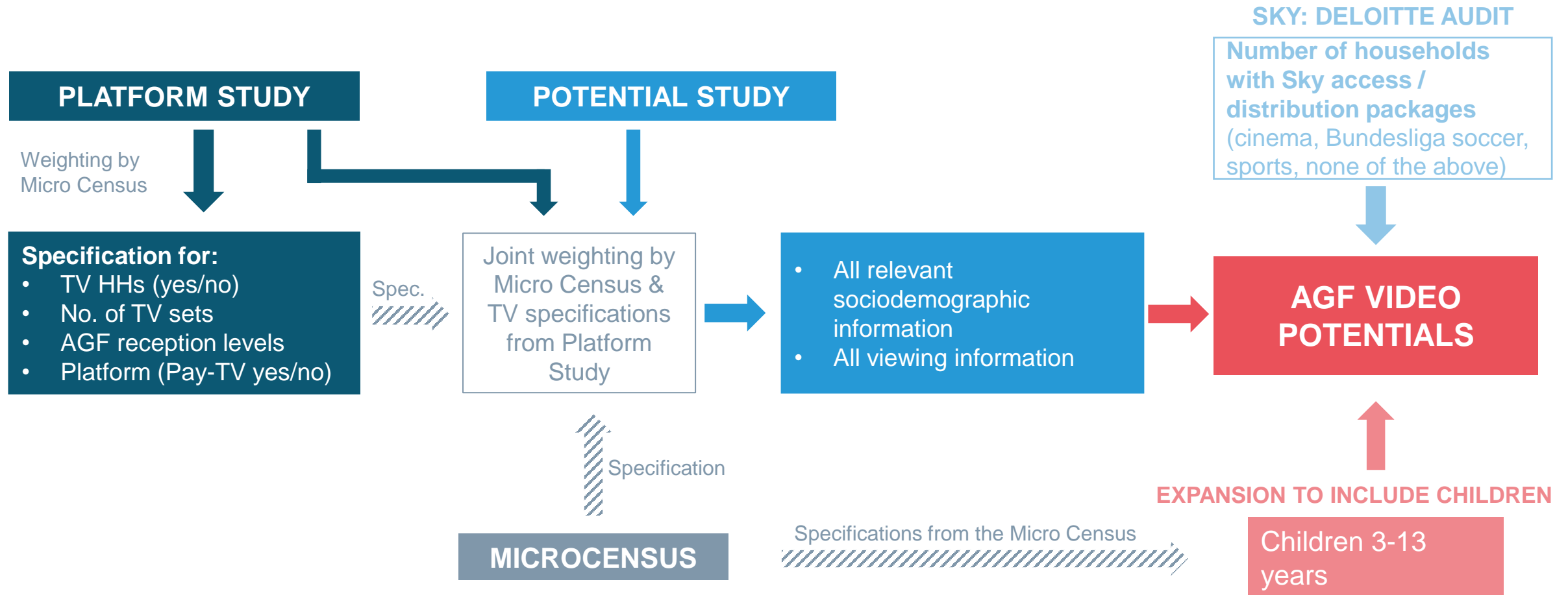
 40.478 million  
 78.271 million



## External specification



# AGF VIDEO POTENTIALS

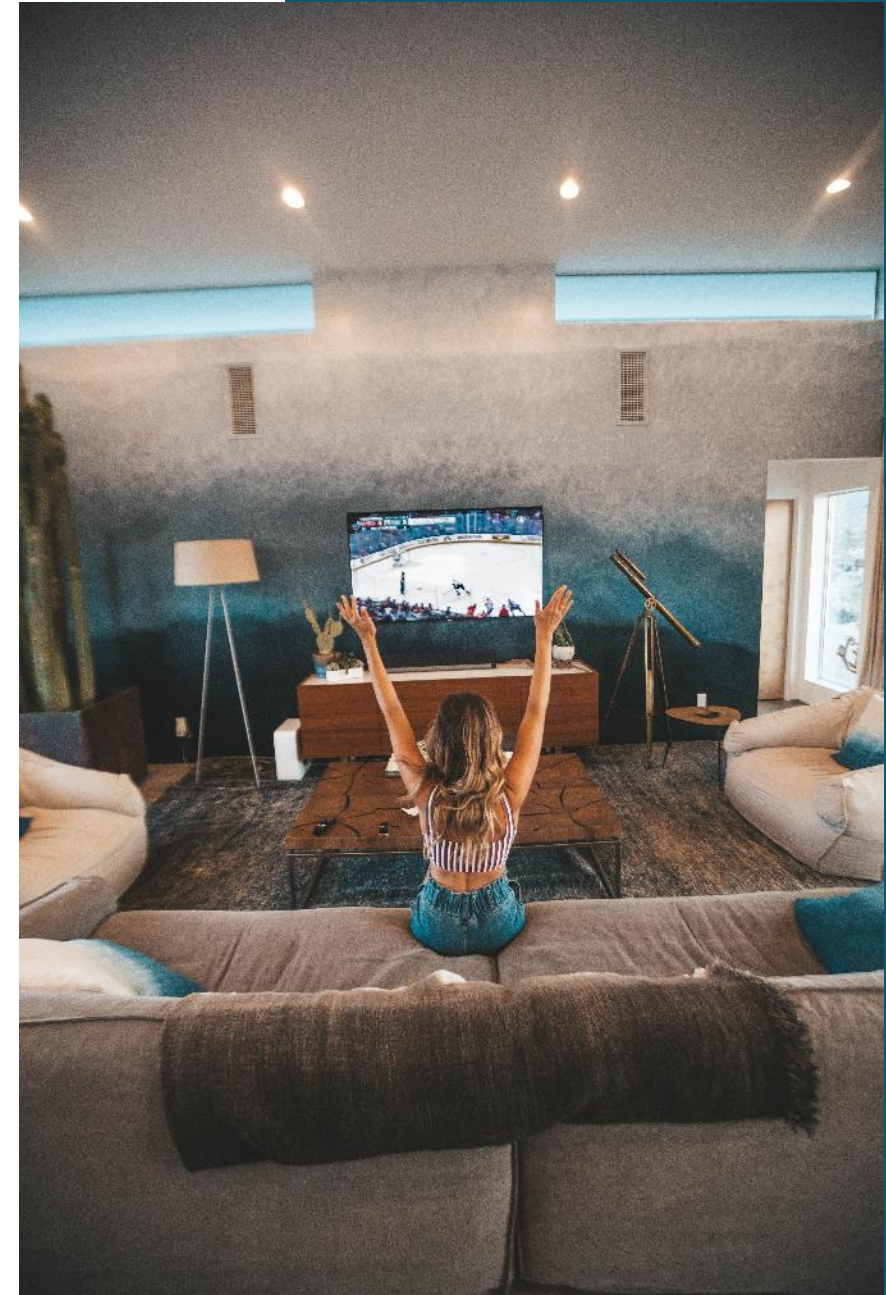
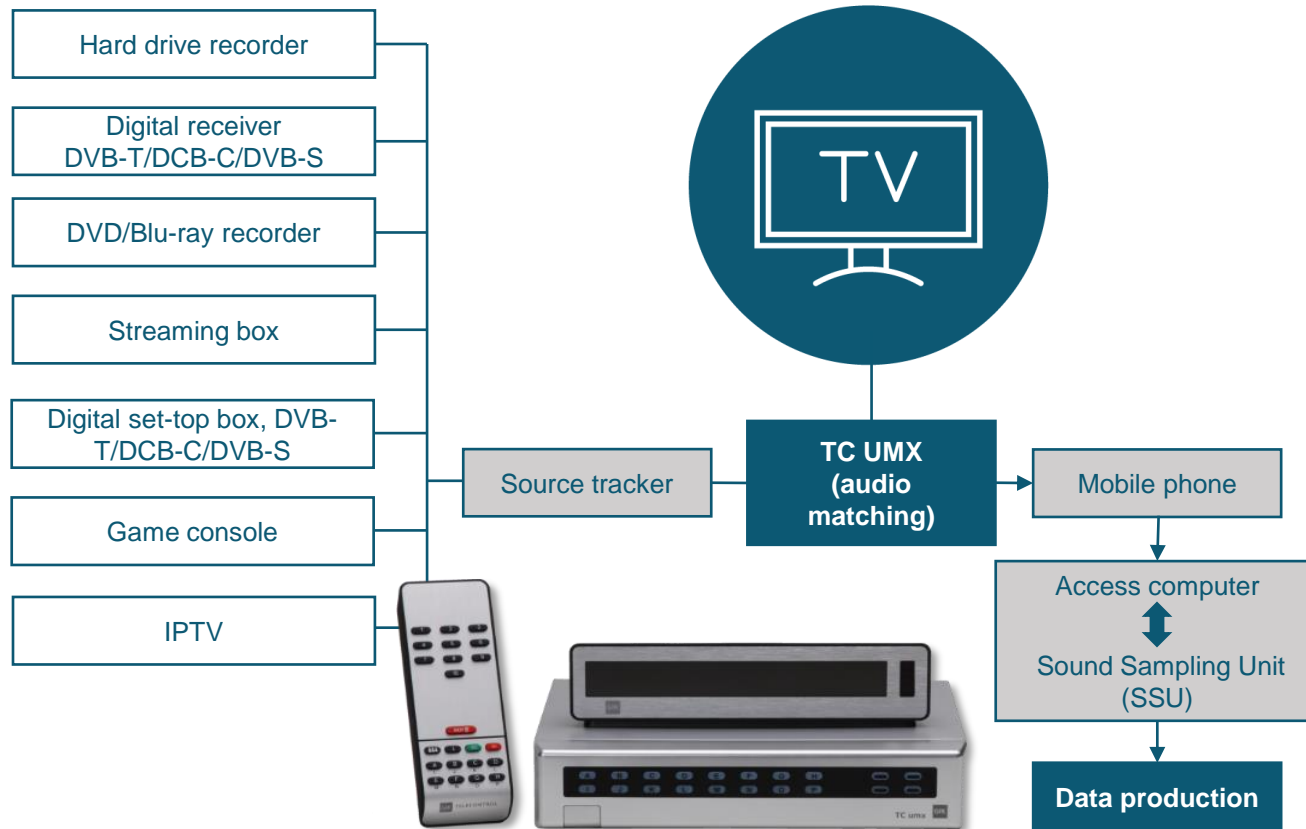


## The AGF Panel

# MEASUREMENT TECHNOLOGY

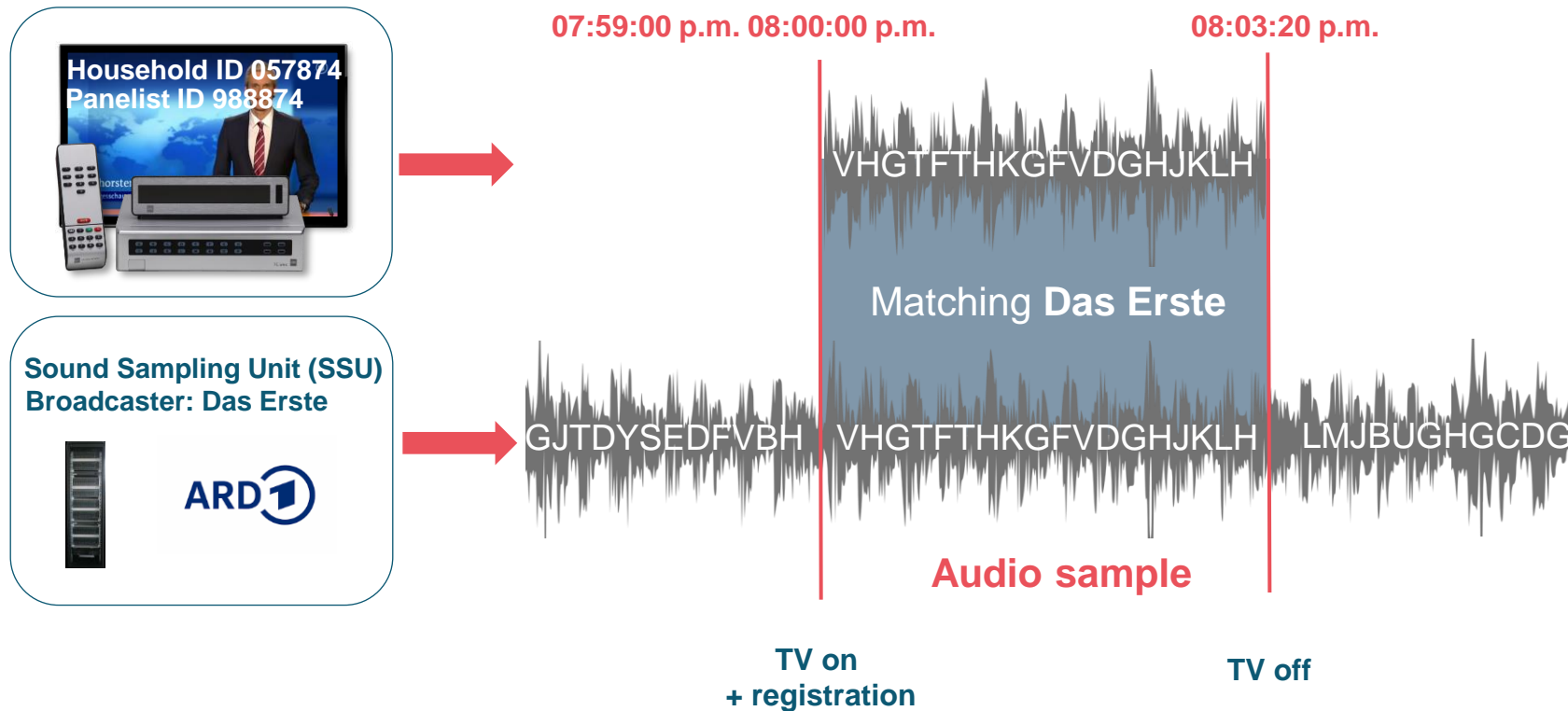
Measurement technology setup in households per TV set

External video sources



# The AGF Panel

## AUDIO MATCHING



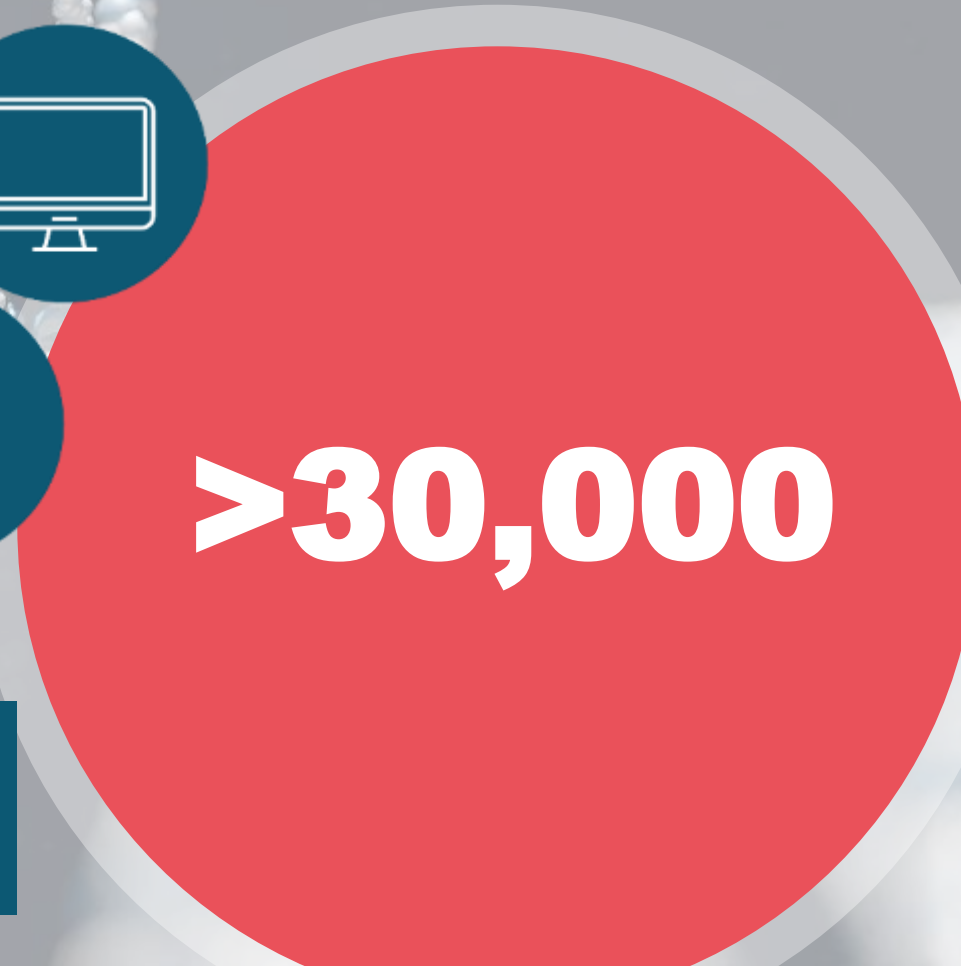
- Audio patterns are captured by the UMX and sent to the server
- The SSU references about 400 soundtracks
- A matching algorithm compares both samples for identity

# 3. STREAMING MEASUREMENT

Video market standard



# PANELS AS "THE SOURCE OF TRUTH"



Every day, more than 30,000 panelists from three panels report for AGF



# STREAMING MEASUREMENT: HYBRID MEASUREMENT APPROACH

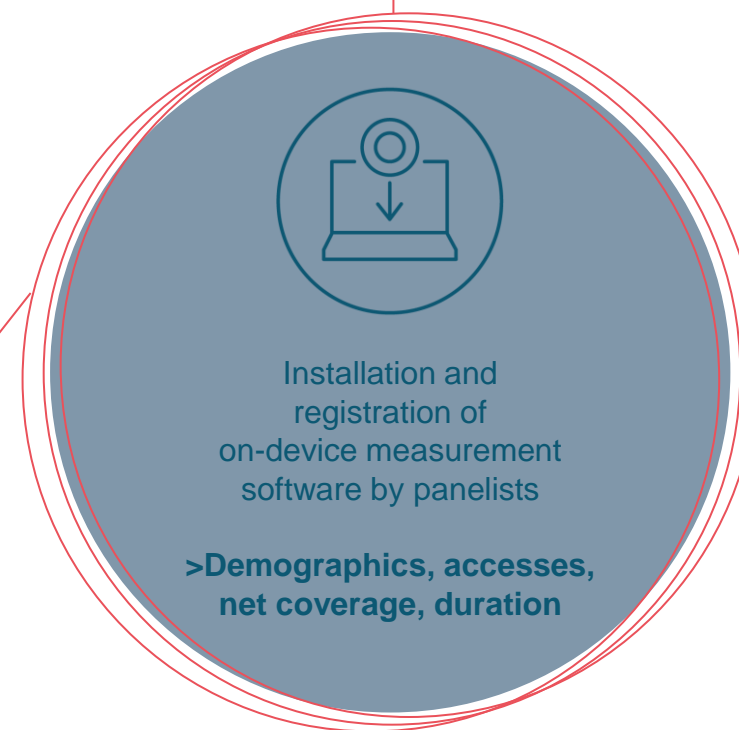
1

## CENSUS MEASUREMENT



2

## PANEL MEASUREMENT



# THE DESKTOP PANEL

## DESKTOP PANEL

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



**54.892 million**

- Active sample: 10,650 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, Mac OS
- Data merged to the TV panel since 01/2017
- Self-recruitment of individual panelists, with the possibility of including other household members in the DSK Panel measurement if devices are used collectively (capture of use by children < 18 years of age)

# THE AGF MOBILE PANEL

## MOBILE PANEL

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



**57.487 million**

- 10,650 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
- Calibration by census measurement
- Integrated in the data production process since 3/19

Video market standard



# AGF MEASUREMENT: FIT FOR THE FUTURE



**Audio-matching  
Watermarking**



**Measurement router  
(single source)**



**Nielsen Tagging  
(consent-less)**

## 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 services at high aggregation levels that do not participate in AGF streaming measurement
- AGF Panel:
  - Up to 12/31/2024: At least 3,600 households per day measured digitally (router)
  - Currently > 3,300 installed households (as of 01/01/2024)

For more details and the current report:  
[www.agf.de/daten/agf-smart-meter](http://www.agf.de/daten/agf-smart-meter)

## AGF Smart Meter: Video use

# PLATFORM VIEWING DURATIONS BY TARGET GROUP

**DECEMBER 2023:** Use of selected platforms on Smart TVs

Ø VIEWING DURATION (MIN.)/DAY

### DIGITAL PLATFORMS ON SMART TVS

	Netflix	Amazon	YouTube	Disney+
TG 3+	6	3	5	1
A 14+	6	3	4	1
C 3-13	6	3	6	2
A 14-29	7	3	7	3
A 30-49	9	5	6	2
A 50+	4	2	2	0
A 14-49	8	4	7	2

Source: AGF Videoforschung; AGF SCOPE 1.4; 12/01/2023-12/31/2023, Market standard: TV; evaluation type: TV time interval; product-specific; mapping of platforms on Smart TVs from the AGF Smart Meter pilot project; own calculations.

# 4. CONVERGENCE DATA

# MERGER PROCESS INTO THE AGF PANEL

## Online Panels

- Measured streaming usage from the Desktop and Mobile Panel

## AGF Panel

- Weighted AGF Panel composed of persons in TV and non-TV households
- Transfer of real streaming usage to online users in the AGF Panel

## AGF Panel

- Weighted AGF Panel composed of persons in TV and non-TV households with TV and streaming usage as convergent data basis

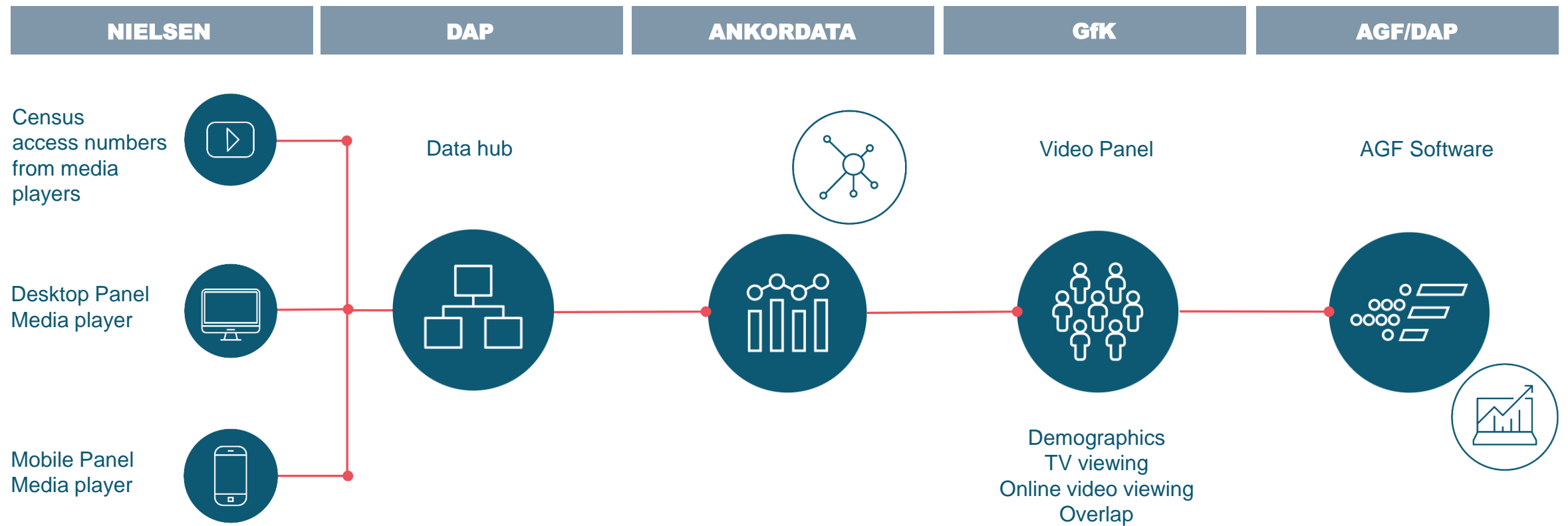
**Merger**  
of streaming usage

**Calibration**  
by census and model specifications



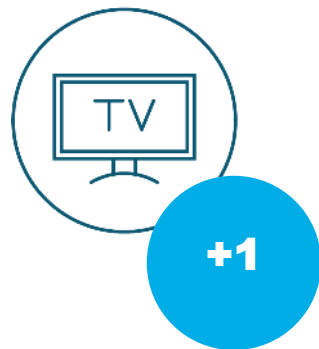
## Convergence data

# DATA PRODUCTION PROCESS

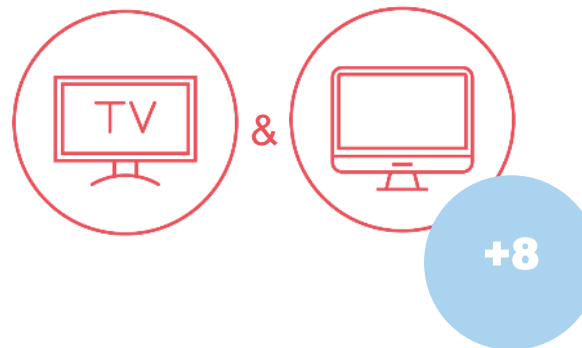


# DAILY CONVERGENCE DATA

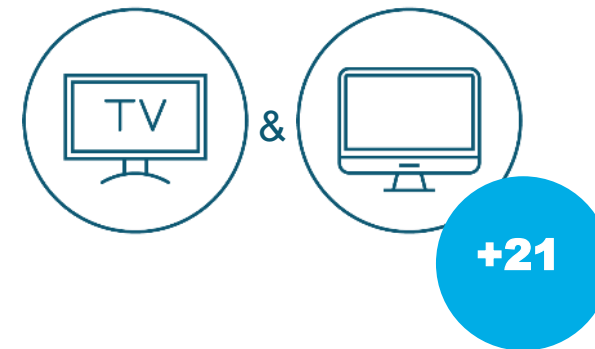
TV viewing data,  
provisional



TV viewing data, final (incl.  
24/7 LS) +  
convergent (TV & streaming)



Consolidated  
viewing data



# EVALUATION AGGREGATIONS

# PROGRAM BRANDS – CROSS-MEDIA REACH FOR STRONG BRANDS

## "Content is King"

- Across all channels, devices and platforms (under measurement)
- Measurement of linear and non-linear content with each other and not against each other
- Decoupling from linearity (use connection)
- Program brands are based on clear and informative definitions/conventions
- Manageable number of useful metrics: **usage volume, gross reach and cumulative net reach**
- Program brands as robust and stable planning units



**Evaluation aggregations****NEW AGGREGATIONS – PROGRAM BRANDS IN  
APRIL 2023 – CUM. NET REACH IN MILLIONS****Total viewers**

37.912 million via TV

1.950 million via streaming

0.953 million via streaming exclusively



**tatort**

## Evaluation aggregations



# NEW AGGREGATIONS – PROGRAM BRANDS IN AUGUST 2023 – CUM. NET REACH IN MILLIONS

## Bundesliga pure

Highlights of the Bundesliga weekend digitally and on free TV on SPORT1 every Sunday

### Total viewers

2.779 million via TV

1.442 million via streaming

### Adults 14-49 years old

0.616 million via TV

0.647 million via streaming

# EVALUATION SOFTWARE

# (NEW) SOFTWARE SOLUTIONS OF AGF



**AGF SCOPE** was developed as a browser-based web application of AGF Videoforschung to evaluate TV, streaming and video usage behavior.

Therefore, access to AGF SCOPE is always possible for any place as long as there is an Internet connection.



**TV CONTROL** serves as an AGF Videoforschung software program for the integrated planning and monitoring of TV advertising campaigns.

The video market standard is likewise provided in TV Control.

It will be possible in the future to choose between the TV market standard and the video market standard.



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

The **REACH PLANNER** is a strategic, rough planning tool to forecast campaign reach values and cost planning for TV and streaming.

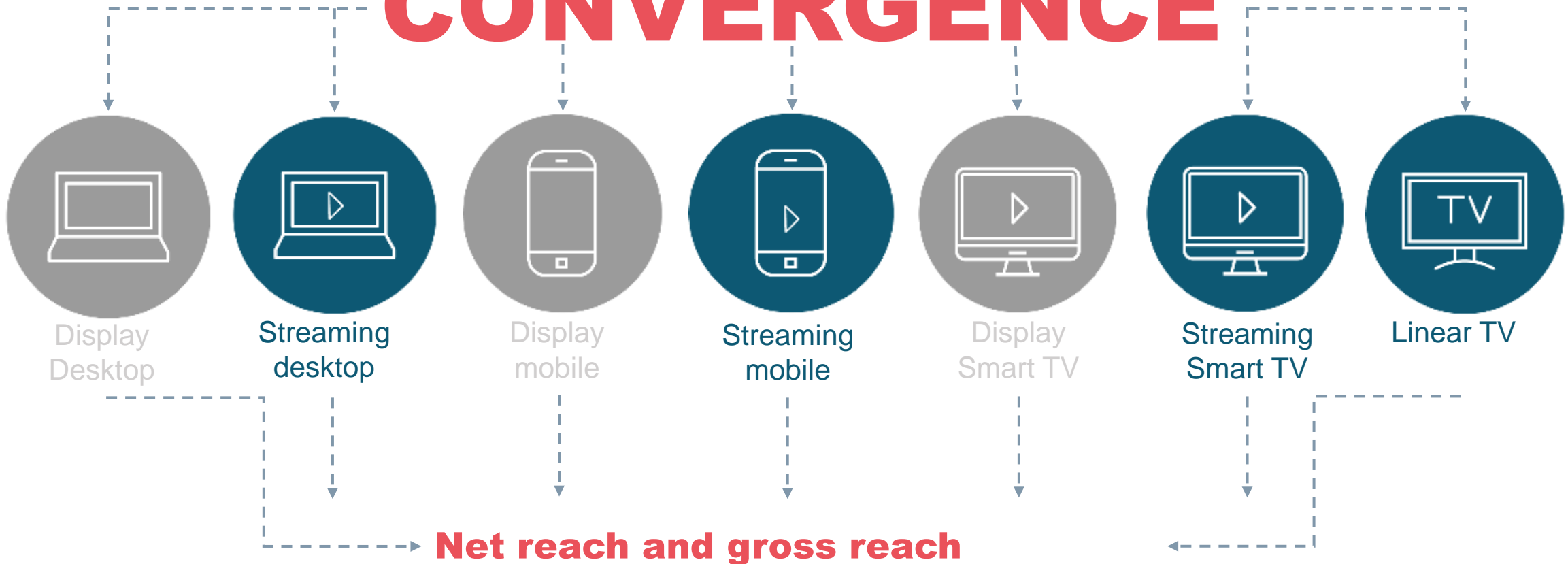
It is planned to integrate additional measurement data bases into the tool.



# **5. EXPANSION OF DIGITAL MEASUREMENT: AGF X-REACH**

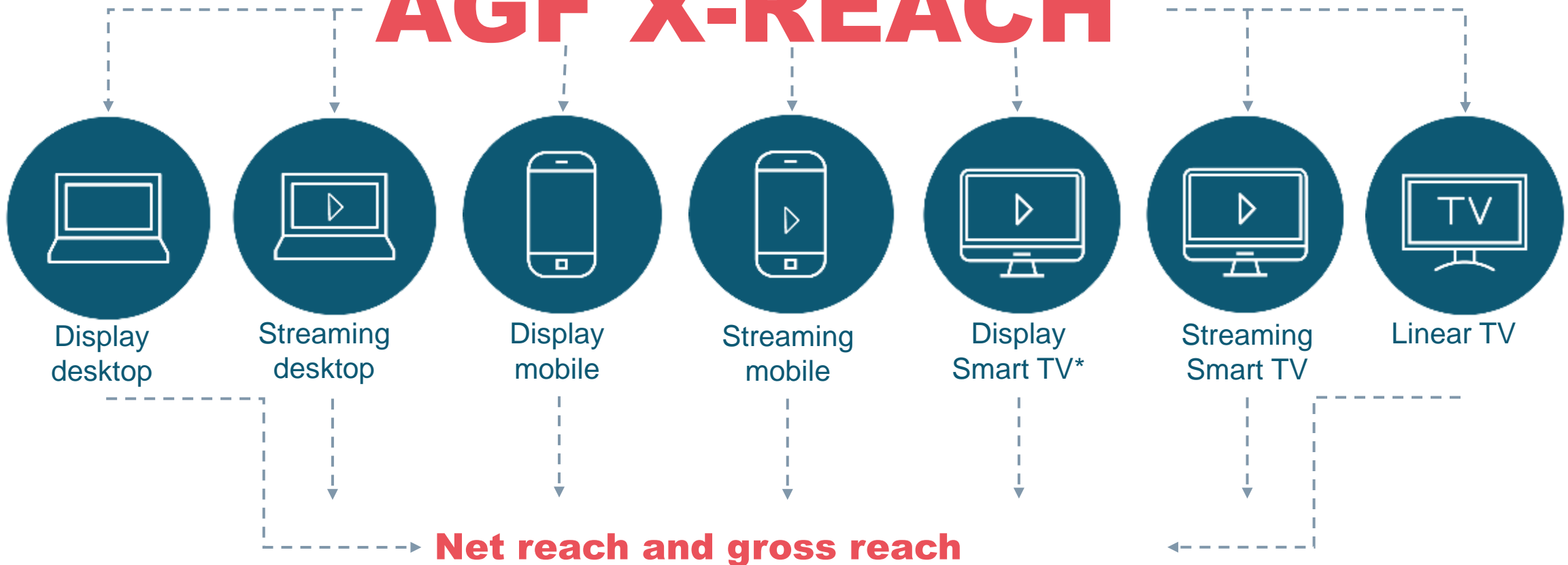
# BRINGING TOGETHER THAT WHICH BELONGS TOGETHER – STATUS QUO

## CONVERGENCE



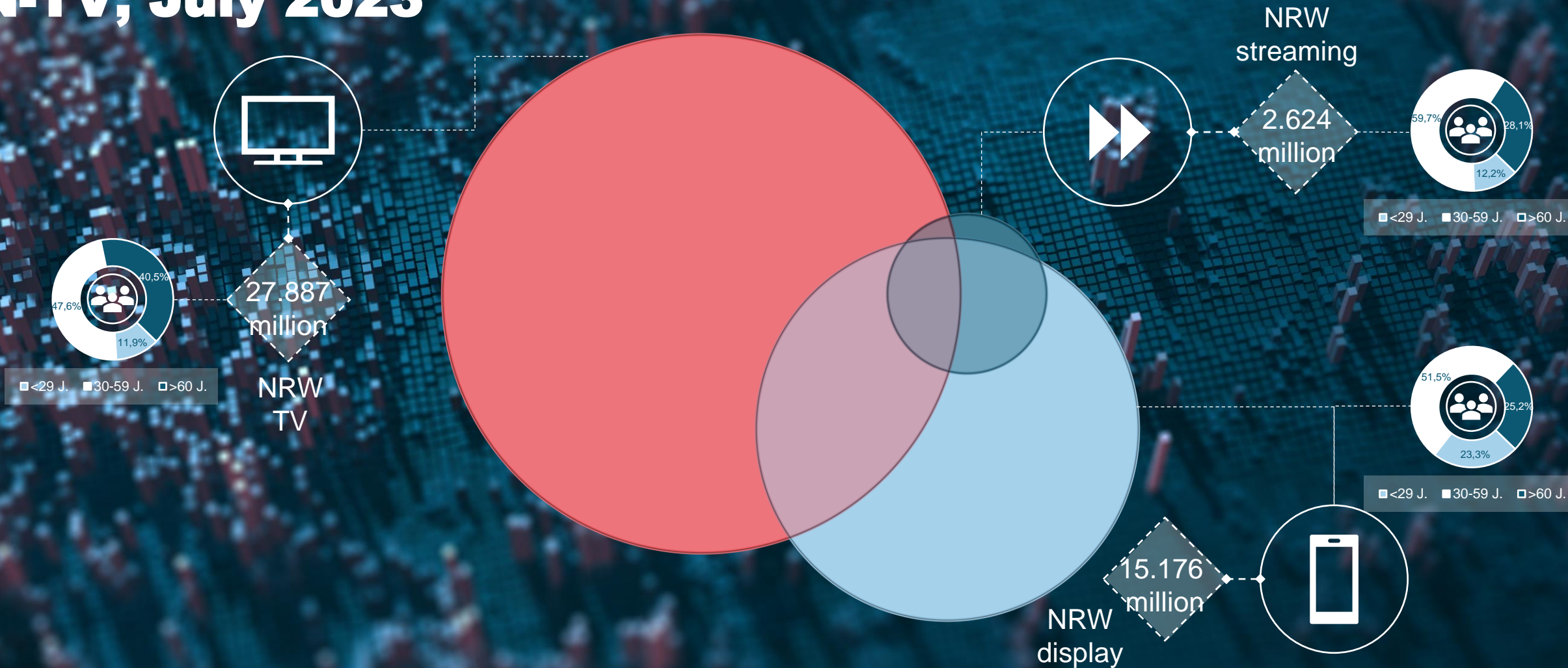
# BRINGING TOGETHER THAT WHICH BELONGS TOGETHER - OUTLOOK

## AGF X-REACH



\* Processing currently without OTT, technically measurable, no test service yet

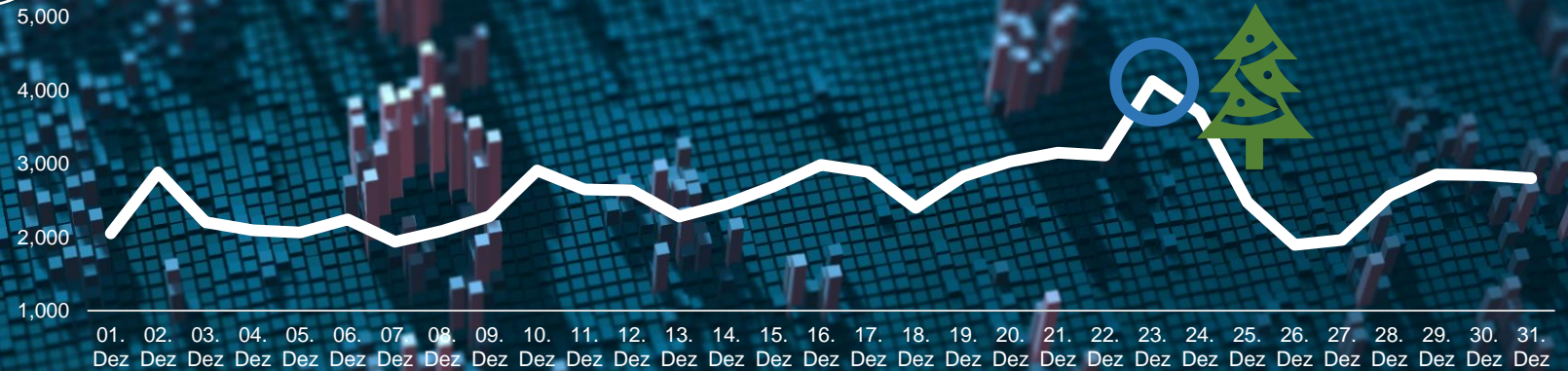
# 37.886 MILLION CROSS-MEDIA NET REACH N-TV; July 2023



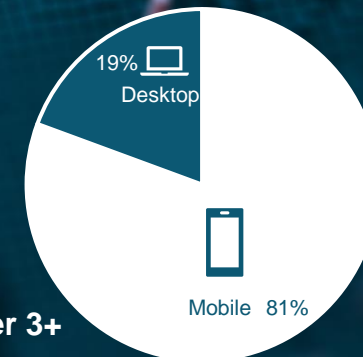
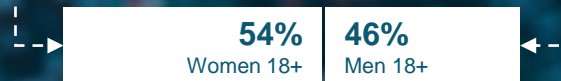
# DEEP DIVE: CHEFKOCH 28.036 million users 3+ DECEMBER 2023



User 3+  
In Mio.



65+; 17%
50-64; 28%
30-49; 31%
14-29; 17%



User 3+

# 6. FURTHER TOPICS

## Further topics

# CURRENT PRESS RELEASES

[Abolition of the landlord's service charge privilege could lead to a shift in reception levels \(04/10/2024\)](#)

[TV in Germany in 2023: Between permanent crisis and escapism \(01/05/2024\)](#)

[Video will become a standard setting in AGF's systems in 2024 \(12/04/2023\)](#)

[With DAZN, AGF places first international streaming platform under measurement \(11/28./2023\)](#)

[Hr media researcher Matthias Eckert named Chairman of the AGF General Meeting of Shareholders \(05/02/2023\)](#)

[OWM Chairman Uwe Storch is appointed Chairman of AGF's Supervisory Board \(02/02/2023\)](#)

[Other press releases](#)



# Contact

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

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