

Video will be the new default setting in AGF systems in 2024

AGF switches video standard on 1 January 2024 / Expansion of the population / New software solutions

Frankfurt, December 4, 2023. On 1 January 2024, AGF Videoforschung will change the default setting in the evaluation systems from the current "market standard TV" to the "market standard video". From then on, the performance values for TV will not only reflect traditional TV usage by default, but also 24/7 live stream usage with a broadcast reference and refer to an expanded population. Convergent data that includes TV and streaming usage has been available in the analysis system since 2017. However, the video market standard previously had to be actively selected.

Since 2014, AGF has determined streaming usage using a hybrid measurement approach with Nielsen, which is based on a census and a panel measurement. Mapping a service in the measurement requires the implementation of measurement software by the respective provider. The streaming usage data has been merged into the AGF panel since 2017 and, together with the TV data, forms the basis for the video market standard.

"The video market standard is the prerequisite for adequately mapping both the changed supply and competitive structure, because the question of how much performance is achieved across different channels and usage types in a given period is becoming increasingly important," says Kerstin Niederauer-Kopf, CEO of AGF Videoforschung.

The changeover affects all AGF software products, i.e. AGF SCOPE as well as the planning systems TV CONTROL and PLAN TV. AGF REACH PLANNER®, a strategic rough-cut planning tool for cross-media, has been based exclusively on the video market standard since 2023.

AGF expands the population

A prerequisite for the changeover to the video market standard is the expansion of the population in the AGF panel, which currently comprises the "resident population in the Federal Republic of Germany in private households with at least one television set in use and a German-speaking main income earner" in the TV market standard. As an increasing number of households, particularly in younger target groups, do not use a TV set, the basic population in the market standard video is expanded to include so-called non-TV households. These households do not have a "big screen", but at least one device that can be used to receive streaming content (PC, laptop, tablet, smartphone). The potential of the video population in 2024 comprises 40.478 million households with a total of 78.271 million

people aged 3 and over. The TV population includes 38.930 million households with 75.546 million people.

Effects on the performance values

The expansion of the population and the switch to the video market standard will influence the performance values. These methodological effects must be taken into account in future analyses and, in particular, in comparisons with data from the past. According to current calculations, the performance figures are likely to change as follows: Absolute values such as viewing figures, net reach and total contacts in millions will increase slightly due to the addition of live streaming for providers participating in streaming measurement with 24/7 live streaming.

On the other hand, relative values such as viewing share in per cent, viewers in per cent, net reach and total contacts in per cent as well as viewing times and the GRP are expected to fall. While the addition of livestream usage has a positive effect on performance figures, the increase in potential resulting from the expansion of the population has the opposite effect and currently more than compensates for the increase due to livestream usage.

In terms of market shares, the addition of live streaming may result in slight shifts among the broadcasters.

When analysing the performance figures, it is also important to take into account the different distribution strategies of the media companies - whether content is distributed across the board or with regulated access - and their participation in the measurement.

New evaluation aggregates

Streaming and TV usage differ significantly: While TV usage has a linear character, streaming is primarily characterised by autonomous 'on demand' usage, often without reference to a specific broadcast. In order to depict both usage contexts, linear TV and streaming are considered together in the new "programme brand" evaluation aggregate, regardless of the end device and whether they were used linearly or non-linearly. For example, cumulative reach for programme brands can be shown on the basis of calendar weeks.

Strategic planning with the AGF REACH PLANNER®

With AGF REACH PLANNER®, AGF has introduced a web-based strategic rough planning tool for forecasting the reach of cross-media campaigns for TV and streaming. The integration of further measurement data sets such as those from the AGF X-REACH pilot project and AGF Smart Meter measurement is planned.

With the installation of measurement routers in the AGF panel, AGF has been working with GfK since 2020 to set up an additional measurement that makes it possible to passively determine the use of platforms such as Amazon Prime Video, Disney+, Netflix and YouTube at a highly aggregated level. The data from this measurement is published monthly in the AGF Smart Meter Report.

About AGF Videoforschung GmbH (www.agf.de)

AGF Videoforschung GmbH specializes in impartial video research. AGF continuously tracks the use of video content in Germany on a quantitative basis and analyses the data collected. It invests many millions of euros per year to continuously refine its instruments in order to

deliver reliable data on the use of video content to the market on a daily basis. AGF consults closely with all market partners, including licensed TV stations, advertisers and media agencies.



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