



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL  
EUROPEAN AUDIOVISUAL OBSERVATORY  
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE

# Note 1 - Measurement Of Fragmented Audiovisual Audiences

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## **NOTE 1: MEASUREMENT OF FRAGMENTED AUDIOVISUAL AUDIENCES**

Authors: Gilles Fontaine and Christian Grece

# 1 Introduction

In its 2014 Edition of the report on “The measurement of fragmented audiovisual audiences”, the European Audiovisual Observatory analysed how on-demand viewing of television programming on the one hand, online video viewing on the other hand, challenge the way that audiovisual audiences are tracked.

The report described the answers that legacy audience measurement services enforce to take into account time-shifted television viewing, and the solutions to measure online video viewing. Even if both approaches provide increasingly reliable data, recent evolutions as the role of mobile in video viewing remain to be totally handled. Moreover the reconciliation of TV-centric and of online-centric approaches to audience measurement into a program-centric solution that would allow to truly monitoring the audience of one given program on any device or network remains to be demonstrated. The detailed presentation of the audience measurement tools is therefore available in the 2014 Edition of this report.

This 2015 Edition focuses on the most recent figures available for television and for online video viewing. It builds on two different sources: Eurodata TV Worldwide for television audiences and comScore Video Metrix for online viewing.

## 2 Executive Summary

### Television audience

- Television audience measurement increasingly goes beyond the tracking of live viewing to include time-shifted viewing. In most countries, viewing is tracked during 6 or 7 days after the live transmission.
- Time spent watching television strongly differs between European Union countries, ranging from 2:33 per day in Sweden to 5:42 in Romania.
- Since 2012, television viewing has reached a plateau in average in the European Union. As time-shifted television viewing has been increasingly included in television audience measurement, this stability implies that live television viewing has declined.
- In all countries, television viewing is significantly lower among young people; in average, a young viewer watches about half less television than the average viewer. And the difference between time spent by the general audience and by young viewers has increased over the 2011-2014 time-period.
- Whereas viewing is stable among the general public, young viewers spend less and less time watching television

### Online video viewing on the fixed Internet

- The analysis of online video viewing on this report is based on comScore data. comScore's Video Metrix audience measurement system tracks the audiences on the fixed Internet websites with videos in 6 member states of the European Union: France, Germany, Italy, the Netherlands, Spain and the United Kingdom. The mobile Internet and page views/video views on mobile devices such as smartphones and tablets are not included in the measurements.
- The numbers of unique viewers of video on the fixed Internet is at best stagnating. This stagnation of the number of viewers translates in a stagnation of the total minutes spent on video on the fixed Internet.
- Whereas the number of users of online video and the total time spent using video appear to be relatively stable, the number of video viewed tend to increase while the time spent on one given video tend to slightly decrease. This evolution is very likely the result of Facebook becoming a key provider of online video.
- The young viewers behaviour on the fixed Internet, both in terms of minutes spent watching on-line video and of number of video viewed is relatively similar to the general population, at least as far as the fixed Internet



is concerned.

- Pay-services such as Netflix generate very different usage patterns than the usual short videos services: the average user uses Netflix approximately 30 mn a day, typically to watch one 30 min video.
- In the 6 countries monitored by comScore, adult sites represent in average 32% of the total time spent on-line.
- Facebook now represents between 18% and 29% of videos viewed on the fixed Internet, and ranks second after Goggle properties.
- The share of the top ten properties in terms of number of video viewed has significantly increased between March 2014 and May 2015 in all the countries monitored by comScore. The top ten properties account from 56% to 73% of all videos viewed.

## TV and online audience in perspective

- It can be roughly estimated that the time spent watching video online represents, depending on the countries, between 5% and 10% of the total time spent watching video online or on TV.

## 3 Trends in television audience

### 3.1 The evolving perimeter of television audience measurement

Television audience measurement increasingly goes beyond the tracking of live viewing to include time-shifted viewing. Time-shifted viewing encompasses two main concepts:

- “viewing On Same Day As Live“ (VOSDAL);
- viewing during a certain number of days following the live transmission of the programme. In most countries, viewing is tracked during 6 or 7 days.

**Table 1 Audience measurement definitions in EU countries**

Country	Audience measurement
AT	Live + VOSDAL + 6 days
BE (National)	Live + VOSDAL + 6 days
BE (VLG)	Live + VOSDAL + 6 days
BE (CFB)	Live + VOSDAL + 6 days
BG	Live
HR	Live
CY	Live
CZ	Live + 7 days
DK	Live + VOSDAL + 7 days
EE	Live + VOSDAL + 7 days
FI	Live + VOSDAL + 7 days
FR	Live + VOSDAL + 7 days
DE	Live + VOSDAL + 3 days
GR	Live
HU	Live + VOSDAL + 7 days
IE	Live + VOSDAL + 7 days
IT	Live + VOSDAL + 7 days
LV	Live
LT	Live
NL	Live + VOSDAL + 6 days
PL	Live + 7 days
PT	Live
RO	Live + VOSDAL + 7 days
SK	Live + VOSDAL + 7 days
SI	Live
ES	Live
SE	Live + VOSDAL + 7 days
UK	Live + VOSDAL + 7 days

OBS based on Eurodata TV Worldwide

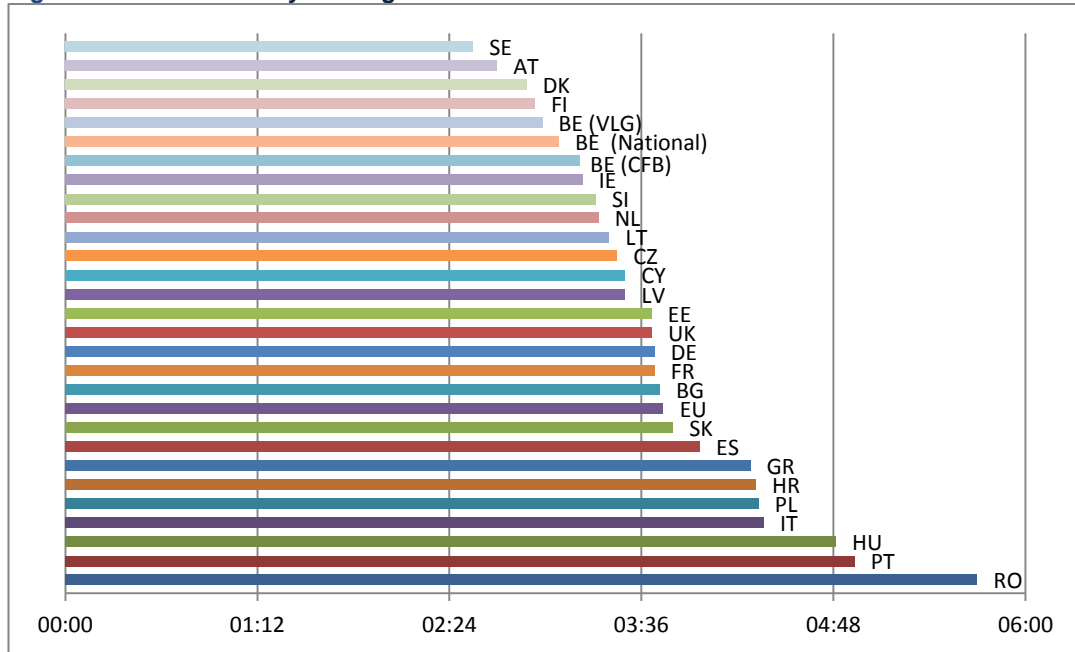
### 3.2 Television viewing in the European Union

Time spent watching television strongly differs between European Union countries, ranging from 2:33 per day in Sweden to 5:42 in Romania:

**Table 2 Television daily viewing in the EU – All universe (hh:mm)**

Country	Age group	2011	2012	2013	2014
AT	3+	02:38	02:48	02:38	02:42
BE (national)	4+	03:02	03:08	03:05	03:05
BE (CFB)	4+	03:16	03:19	03:14	03:13
BE (VLG)	4+	02:52	03:00	02:58	02:59
BG	4+	03:45	03:49	03:45	03:43
CY	4+	02:45	02:59	03:22	03:30
CZ	4+	03:17	03:21	03:28	03:27
DE	3+	03:45	03:42	03:41	03:41
DK	3+	03:18	03:15	03:00	02:53
EE	4+	03:49	03:46	03:36	03:40
ES	4+	03:59	04:06	04:04	03:58
FI	4+	02:52	02:55	02:54	02:56
FR	4+	03:47	03:50	03:46	03:41
GR	4+	04:28	04:22	04:11	04:17
HR	4+	04:27	04:23	04:15	04:19
HU	4+	04:46	04:46	04:46	04:49
IE	4+	03:25	03:23	03:16	03:14
IT	4+	04:14	04:17	04:21	04:22
LT	4+	03:24	03:36	03:40	03:24
LV	4+	03:29	03:34	03:19	03:30
NL	6+	03:11	03:16	03:15	03:20
PL	4+	04:02	04:03	04:07	04:20
PT	4+	03:39	04:44	04:58	04:56
RO	4+	04:22	05:26	05:41	05:42
SE	3+	02:42	02:44	02:39	02:33
SI	4+	03:06	03:13	03:15	03:19
SK	4+	03:27	03:38	03:47	03:48
UK	4+	04:02	04:01	03:52	03:40
<b>EU</b>		<b>03:36</b>	<b>03:44</b>	<b>03:43</b>	<b>03:43</b>

OBS based on Eurodata TV Worldwide

**Figure 1 Television daily viewing in the EU – All universe**

OBS based on Eurodata TV Worldwide

In all countries, television viewing is significantly lower among young people and ranges between 01:12 in Sweden and 3:45 in Portugal:

**Table 3 Television daily viewing in the EU – Young (hh:mm)**

Country	Age group	2011	2012	2013	2014
AT	12-29	01:35	01:35	01:28	01:35
BE (national)	18-24	01:15	01:23	01:40	01:38
BE (CFB)	18-24	01:30	01:37	01:49	01:30
BE (VLG)	18-24	01:02	01:12	01:33	01:45
BG	15-24	01:57	02:02	02:05	01:47
CY	13-24	01:22	01:26	01:25	01:56
CZ	15-24	01:28	01:30	01:30	01:31
DE	14-29	02:21	02:17	02:08	02:04
DK	15-24	02:43	02:27	02:04	01:52
EE	15-24	02:06	02:01	01:50	01:44
ES	15-25	02:26	02:33	02:26	02:14
FI	15-24	01:27	01:26	01:19	01:17
FR	15-34	02:45	02:47	02:37	02:26
GR	15-24	02:34	02:25	02:01	01:59
HR	15-24	02:39	02:29	02:20	02:09
HU	15-24	02:45	02:39	02:46	02:44
IE	15-34	02:52	02:54	02:42	02:29
IT	15-24	02:29	02:33	02:37	02:31
LT	15-24	01:59	02:01	01:43	01:36

Country	Age group	2011	2012	2013	2014
LV	15-24	01:44	01:40	01:29	01:32
NL	20-34	02:42	02:40	02:41	02:38
PL	16-24	01:54	01:58	01:54	01:54
PT	15-24	02:49	03:55	03:47	03:45
RO	15-24	02:21	03:48	03:57	03:34
SE	15-24	01:27	01:25	01:22	01:12
SI	15-24	01:39	01:25	01:17	01:24
SK	15-24	01:52	01:52	01:53	01:51
UK	16-24	02:45	02:37	02:28	02:18
<b>EU</b>	<b>Young</b>	<b>02:09</b>	<b>02:13</b>	<b>02:08</b>	<b>02:03</b>

OBS based on Eurodata TV Worldwide

In average, a young viewer watches about half less than television than the average viewer:

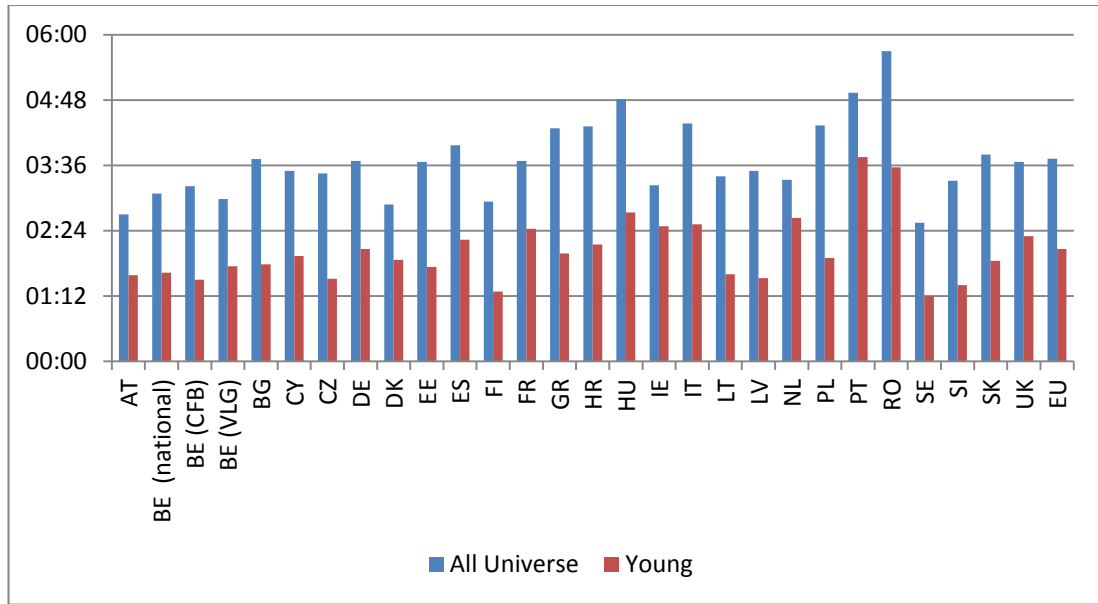
**Table 4 Comparison of television viewing between the general audience and young viewers in 2014 (hh:mm)**

Country	All Universe	Young	Young compared to all universe
AT	02:42	01:35	-41%
BE (national)	03:05	01:38	-47%
BE (CFB)	03:13	01:30	-53%
BE (VLG)	02:59	01:45	-41%
BG	03:43	01:47	-52%
CY	03:30	01:56	-45%
CZ	03:27	01:31	-56%
DE	03:41	02:04	-44%
DK	02:53	01:52	-35%
EE	03:40	01:44	-53%
ES	03:58	02:14	-44%
FI	02:56	01:17	-56%
FR	03:41	02:26	-34%
GR	04:17	01:59	-54%
HR	04:19	02:09	-50%
HU	04:49	02:44	-43%
IE	03:14	02:29	-23%
IT	04:22	02:31	-42%
LT	03:24	01:36	-53%
LV	03:30	01:32	-56%
NL	03:20	02:38	-21%
PL	04:20	01:54	-56%
PT	04:56	03:45	-24%
RO	05:42	03:34	-37%

Country	All Universe	Young	Young compared to all universe
SE	02:33	01:12	-53%
SI	03:19	01:24	-58%
SK	03:48	01:51	-51%
UK	03:40	02:18	-37%
<b>EU</b>	<b>03:43</b>	<b>02:03</b>	<b>-45%</b>

OBS based on Eurodata TV Worldwide

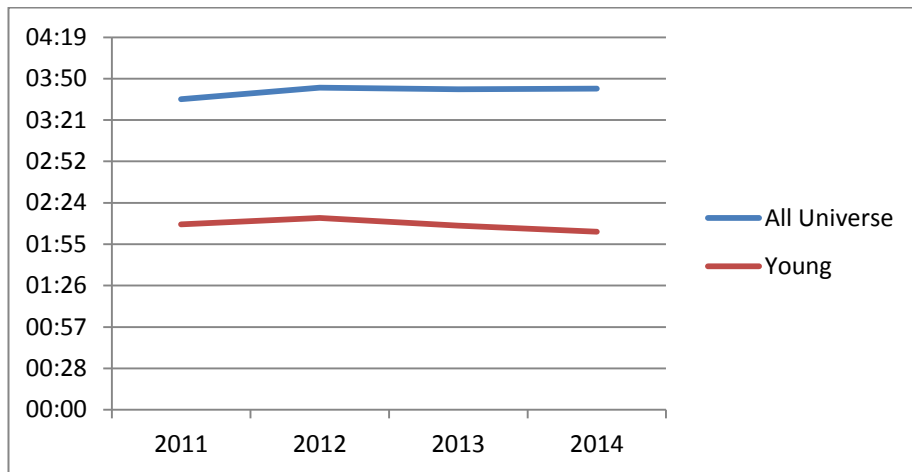
**Figure 2 Comparison of television viewing between the general audience and young viewers in 2014**



OBS based on Eurodata TV Worldwide

The difference between time spent by the general audience and by young viewers has increased over the 2011-2014 time-period:

**Figure 1: Average television viewing in the EU – 2011-2014 (hh:mm)**



OBS based on Eurodata TV Worldwide

### 3.3 Evolution of television viewing in Europe

Television viewing has reached a plateau in average in the European Union since 2012. As time-shifted television viewing has been increasingly included in television audience measurement, this stability implies that live television viewing has declined during the same period:

**Table 5 Evolution of television viewing in the EU 2011- 2014 (%)**

Country	Age group	2014 VS 2013	2014 Vs 2012	2014 Vs 2011
AT	3+	3%	-4%	3%
BE (national)	4+	0%	-2%	2%
BE (CFB)	4+	-1%	-3%	-2%
BE (VLG)	4+	1%	-1%	4%
BG	4+	-1%	-3%	-1%
CY	4+	4%	17%	27%
CZ	4+	0%	3%	5%
DE	3+	0%	0%	-2%
DK	3+	-4%	-11%	-13%
EE	4+	2%	-3%	-4%
ES	4+	-2%	-3%	0%
FI	4+	1%	1%	2%
FR	4+	-2%	-4%	-3%
GR	4+	2%	-2%	-4%
HR	4+	2%	-2%	-3%
HU	4+	1%	1%	1%
IE	4+	-1%	-4%	-5%
IT	4+	0%	2%	3%
LT	4+	-7%	-6%	0%
LV	4+	6%	-2%	0%
NL	6+	3%	2%	5%
PL	4+	5%	7%	7%
PT	4+	-1%	4%	35%
RO	4+	0%	5%	31%
SE	3+	-4%	-7%	-6%
SI	4+	2%	3%	7%
SK	4+	0%	5%	10%
UK	4+	-5%	-9%	-9%
<b>EU</b>		<b>0%</b>	<b>0%</b>	<b>3%</b>

OBS based on Eurodata TV Worldwide

Whereas viewing is stable among the general public, young viewers spend less and less time watching television:

**Table 6 Evolution of television viewing among young in the EU 2011- 2014 (%)**

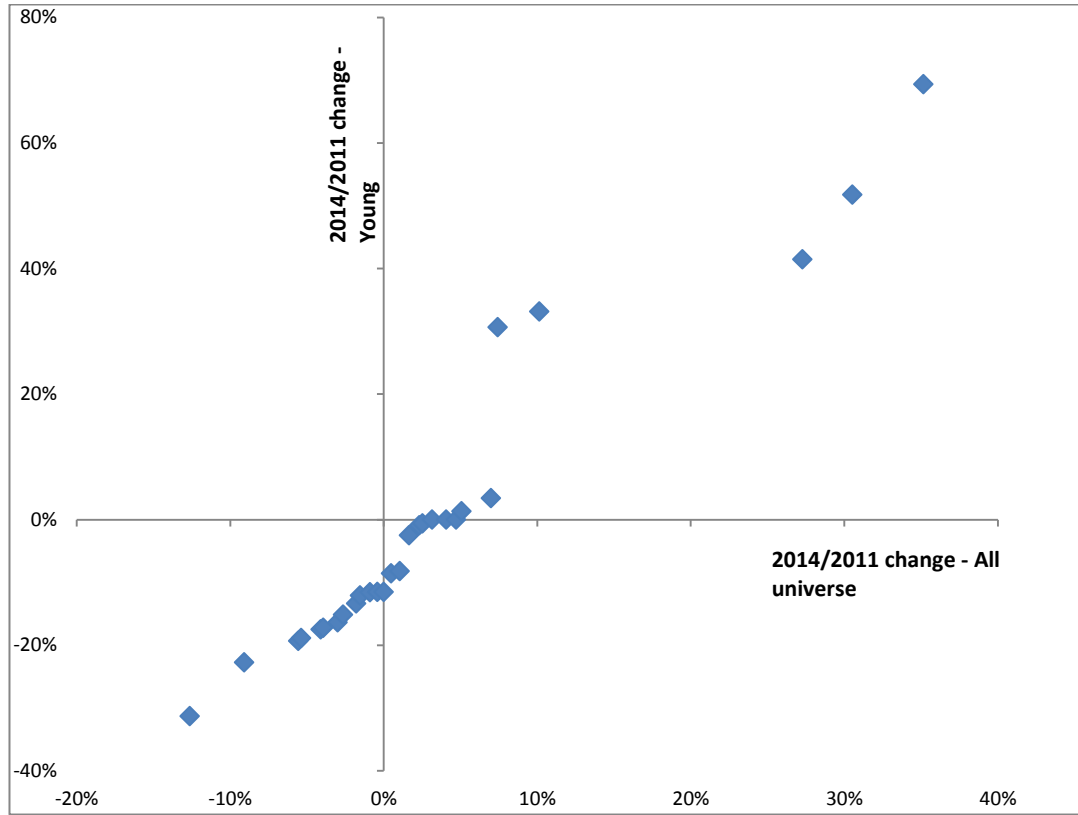
Country	Age group	2014 Vs 2013	2014 Vs 2012	2014 Vs 2011
AT	12-29	8%	0%	0%
BE (national)	18-24	-2%	18%	31%
BE (CFB)	18-24	-17%	-7%	0%
BE (VLG)	18-24	13%	46%	69%
BG	15-24	-14%	-12%	-9%
CY	13-24	36%	35%	41%
CZ	15-24	1%	1%	3%
DE	14-29	-3%	-9%	-12%
DK	15-24	-10%	-24%	-31%
EE	15-24	-5%	-14%	-17%
ES	15-25	-8%	-12%	-8%
FI	15-24	-3%	-10%	-11%
FR	15-34	-7%	-13%	-12%
GR	15-24	-2%	-18%	-23%
HR	15-24	-8%	-13%	-19%
HU	15-24	-1%	3%	-1%
IE	15-34	-8%	-14%	-13%
IT	15-24	-4%	-1%	1%
LT	15-24	-7%	-21%	-19%
LV	15-24	3%	-8%	-12%
NL	20-34	-2%	-1%	-2%
PL	16-24	0%	-3%	0%
PT	15-24	-1%	-4%	33%
RO	15-24	-10%	-6%	52%
SE	15-24	-12%	-15%	-17%
SI	15-24	9%	-1%	-15%
SK	15-24	-2%	-1%	-1%
UK	16-24	-7%	-12%	-16%
<b>EU</b>	<b>Young</b>	<b>-3%</b>	<b>-7%</b>	<b>-4%</b>

OBS based on Eurodata TV Worldwide

As for the general audience, there are strong differences between countries as regards television viewing by young audiences. However, the general audience and young audiences have similar evolution in one given country: where time spent by the general audience tends to increase, time spent by young audiences tends also to increase (or decrease less than in other countries):



**Figure 3 Comparison of the evolution of time spent by the general audience and young audiences – 2014-2015**



OBS based on Eurodata TV Worldwide

Note: each dot represents a country

## 4 Key trends in online video viewing on the fixed-Internet

This section provides details of the development of online viewing in 6 EU countries. It is based on comScore data. ComScore's Video Metrix measures the audiences on the fixed Internet websites with videos in 6 member states of the European Union: France, Germany, Italy, the Netherlands, Spain and the United Kingdom. The mobile Internet and page views/video views on mobile devices such as smartphones and tablets are not included in the measurements.

### 4.1 Stagnation of the number of viewers on the fixed Internet

The numbers of unique viewers of video on the fixed Internet is at best stagnating in the countries monitored by comScore. Several factors could account for this stagnation:

- maturity of the broadband market;
- increasing availability of on-demand video services on managed cable or IPTV services, as an alternative to the "open Internet" online video viewing;
- increasing role of mobile devices to use online video services.

**Table 7 Total Unique Viewers, in thousand, EU 6 - August - 2013 - May 2015**

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OBS based on comScore Video Metrix data

**Figure 4 Total Unique Viewers, in thousand, EU 6 - August - 2013 - May 2015**

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OBS based on comScore Video Metrix data

Over the August 2014-May 2015 period, this stagnation can be observed in all the countries of the comScore sample, with variations that can be attributed to an extent to the limitations of the audience measurement tool:

**Figure 5 Total Unique Viewers, in thousand, EU 6 – By country - August - 2013 - May 2015**

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OBS based on comScore Video Metrix data

This stagnation of the number of viewers of on-line videos, translates in a stagnation of the total minutes spent on video on the fixed Internet. However, comScore

shows a decrease in time spent from August 2013 to June 2014, followed by an increase from August 2014 to May 2015, reaching the same level than 18 months earlier.

**Table 8 Total minutes per month for total audience, in million - EU 6 - August 2013-Mai 2015**

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OBS based on comScore Video Metrix data

**Figure 6 Total minutes per month for total audience, in million - EU 6 - August 2013-Mai 2015**

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OBS based on comScore Video Metrix data

All countries from the comScore sample show a similar “rebound” in 2014, with the exception of the Netherlands.

**Figure 7 Total minutes per month for total audience, in million - EU 6 – By country - August 2013-Mai 2015**

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OBS based on comScore Video Metrix data

## 4.2 More but shorter videos

Whereas the number of users of online video and the total time spent using video appear to be relatively stable, the number of video viewed tend to increase while the time spent on one given video tend to slightly decrease in certain countries. This evolution is very likely the result of Facebook becoming a key provider of online video, as the social network, through its “Autoplay”, enables users to quickly assess the interest of a video and then skip it.

The number of videos viewed by a user has notably increased between August 2013 and May 2015 in Italy, Germany, Spain and France. It however remained stable in the Netherlands.

**Table 9 Videos per viewer - EU 6 - August 2013-May 2015**

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OBS based on comScore Video Metrix data

**Figure 8 Videos per viewer - EU 6 - August 2013-May 2015**

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OBS based on comScore Video Metrix data

The number of minutes spent on a video has decreased in all countries of the comScore sample, from -5% in the Netherlands, to -36% in Italy.

**Figure 9 Minutes per video - EU 6 - August 2013-May 2015**

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OBS based on comScore Video Metrix data

**Figure 10 Minutes per video - EU 6 - August 2013-May 2015**

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OBS based on comScore Video Metrix data

**4.3 Online video usages of young viewers relatively similar to the general population**

Even if some differences exist between countries, the young viewers behaviour on the fixed Internet, both in terms of minutes spent watching on-line video and of number of video viewed, is relatively similar to the general population. One could say that online video viewing on the Internet is now a mainstream service, available to and used by all age categories. However, as comScore does not monitor the mobile Internet video consumption, it may be possible that young viewers have a higher use of services such as Facebook and hence, as Facebook is becoming a key provider of online video, have a higher global usage of online video.

**Table 10 Minutes per viewer - General population Vs 15-24 - May 2015**

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OBS based on comScore Video Metrix data

**Table 11 Video per viewer - General population Vs 15-24 - May 2015**

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OBS based on comScore Video Metrix data

## 4.4 Netflix: a different pattern

The comScore video Metrix data give some indications on how Netflix, the Subscription Video-on-demand service, is used in the 4 European countries where it has launched and which are monitored by comScore. According to these data, the average user uses Netflix approximately 30 mn a day, typically to watch one 30 mn video.

**Table 12 Netflix Indicators - May 2015**

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OBS based on comScore Video Metrix data

## 4.5 Adult sites represent a high share of online viewing

Among the 6 countries monitored by comScore, adult sites represent in average 32% of the total time spent online. This share has slightly declined since mid-2014, but adult sites remains the first category of sites for online viewing.

**Table 13 EU-6 – Percentage of adult site viewing minutes of total viewing minutes (in MM and %) – May 2015**

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OBS based on comScore Video Metrix data

## 4.6 Facebook has become a key player

In terms of players, the key trend between March 2014 and May 2015 has been the surge of Facebook, now representing between 18% and 29% of videos viewed on the fixed Internet, and ranking second after Goggle properties.

**Table 14 Market share of Facebook in video views - EU 6-March 2014/May 2015**

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OBS based on comScore Video Metrix data

However, as Facebook videos are integrated within the general line-up of information provided by the “Facebook” pages, Facebook users tend to “skip” more easily a video or switch to the next one. Another factor may be also an over-representation of User-Generated short videos on Facebook when compared to Google’ YouTube. The time spent per video is therefore significantly lower on Facebook than on You Tube.



**Table 15 Google and Facebook - mn per video - May 2015**

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OBS based on comScore Video Metrix data

The surge of Facebook as a leading provider of on-line video has, in certain countries (such as Italy and the Netherlands), significantly affected Goggle market shares, whereas it has remained stable in Germany, Spain or the UK.

**Table 16 Market share of Google in video views - EU 6-March 2014/May 2015**

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OBS based on comScore Video Metrix data

## 4.7 A trend to concentration led by pan-European services

The share of the top ten properties in terms of number of video views has significantly increased between March 2014 and May 2015 in all the countries monitored by comScore. The top ten properties account from 56% to 73% of all videos viewed.

**Table 17 Market share of top 10 properties in video views - EU 6-March 2014/May 2015**

For copyright reasons the data cannot be reproduced in the public version of this report

OBS based on comScore Video Metrix data

The following table presents all the top 10 properties in the 6 countries monitored by comScore. It pictures a certain level of concentration at the pan-European level:

- 6 players are part of the top 10 properties in each of the 6 countries monitored by comScore, a 7<sup>th</sup> is present in 5 countries, an 8<sup>th</sup> in 3 countries
- Apart from these 8 “pan-European” players, the rest of the top 10 properties in each country is composed of 2 to 3 smaller players, often national, which are not present in any other top 10 properties of the comScore sample. Among these national players are national media group, such as Axel Springer, Burda, Mediaset, Gruppo Editoriale Espresso, Vivendi or the BBC.

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OBS based on comScore Video Metrix data

## 4.8 Country data – TV and online audience

### 4.8.1 France

#### **Table 18 France - Online viewing key indicators**

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#### **Table 19 France - Top 10 Video Properties – May 2015**

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## 4.8.2 Germany

### **Table 20 Germany - Online viewing key indicators**

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### **Table 21 Germany - Top 10 Video Properties – May 2015**

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### 4.8.3 Italy

#### **Table 22 Italy - Online viewing key indicators**

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#### **Table 23 Italy - Top 10 Video Properties – May 2015**

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#### 4.8.4 Spain

##### **Table 24 Spain - Online viewing key indicators**

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##### **Table 25 Spain - Top 10 Video Properties – May 2015**

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## 4.8.5 The Netherlands

### **Table 26 The Netherlands - Online viewing key indicators**

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### **Table 27 The Netherlands - Top 10 Video Properties – May 2015**

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## 4.8.6 United Kingdom

### **Table 28 United Kingdom - Online viewing key indicators**

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### **Table 29 United Kingdom- Top 10 Video Properties – May 2015**

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## 5 TV and online audiences in perspective

Even if online video viewing on the fixed Internet has increased dramatically since the roll-out of broadband networks (but now seems to be relatively stagnating), it still represents a relatively small portion of the total time spent watching video.

The following table intent to estimate the relative share of television and online in video viewing. It should be kept in mind that online figures provided by comScore do not include viewing of video on mobile. However, it can be roughly estimated that time spent watching online video represents, depending on the countries between 5% and 10% of the total time spent watching video online or on TV.

**Table 30 Comparison of time spent watching television and online videos**

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OBS based on Eurodata TV Worldwide and comScore Video Metrix data



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