Eurodata TV Worldwide

October 6th, 2014

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**EBU knowledge Exchange:
No apocalyptic future for television**

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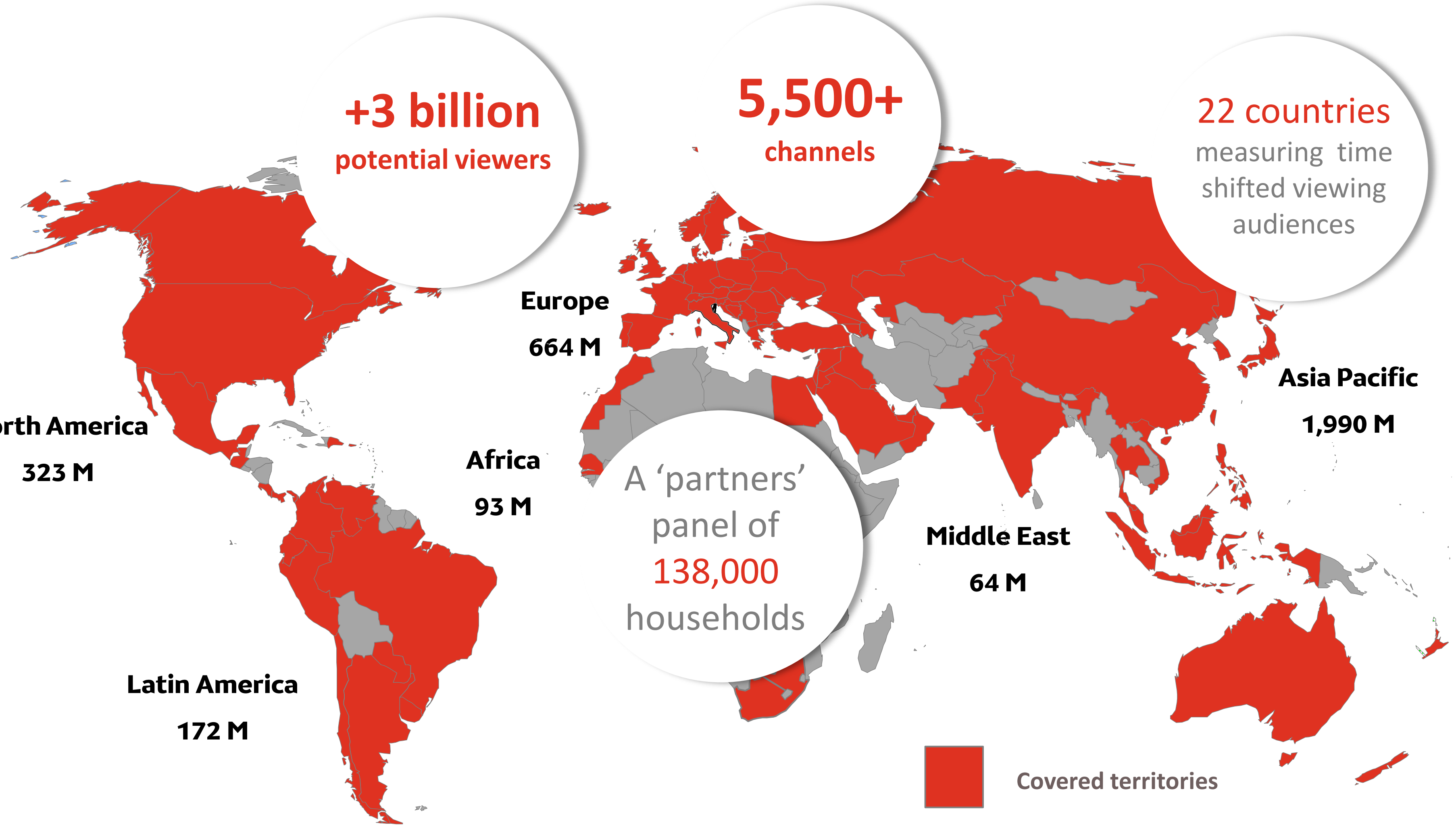
A unique destination for international TV data & expertise

Eurodata TV
WORLDWIDE

Eurodata TV Worldwide: an international vision…

A worldwide panorama of TV consumption across 100 territories



...enabling international expertise

Local TAM* Partners

Clients

Up to

100+
territories

100
partners

Analysis
& control

*TAM = Television Audience Measurement

2

Key facts on the world TV market

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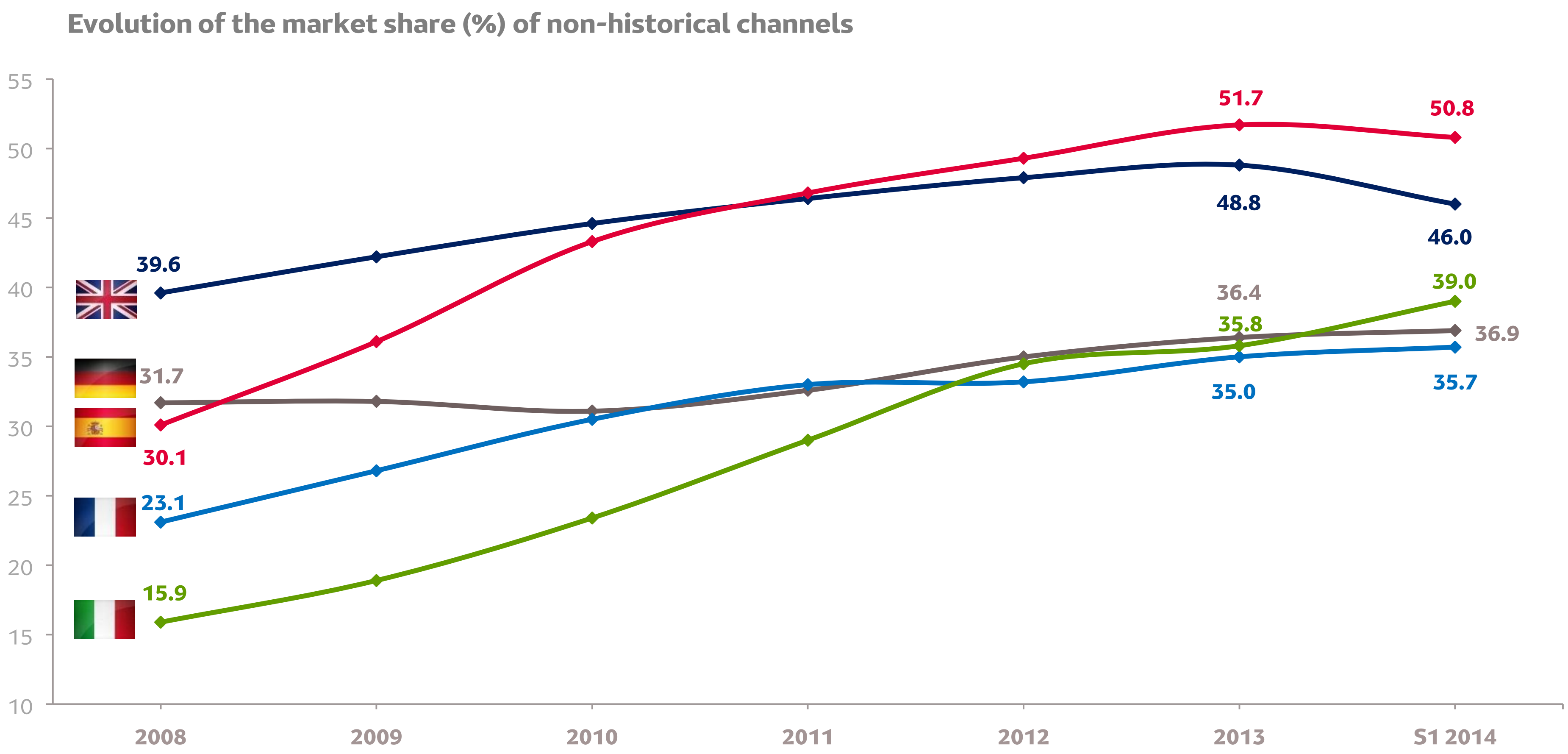
Europe: an almost stable competition



Based on total individuals, total day. Time shifted viewing included where measured.

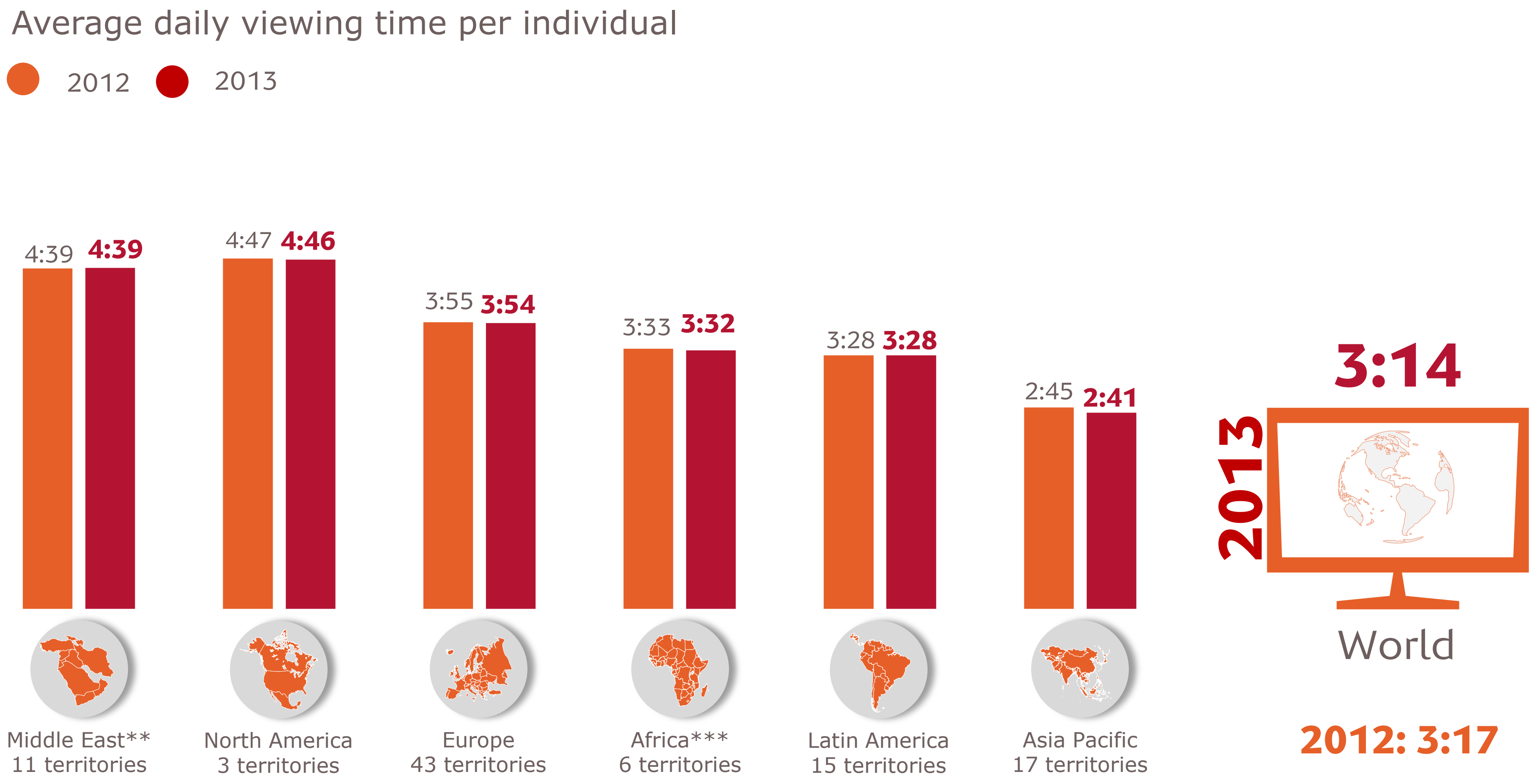
* Historical leaders in 2003: **Germany**: ARD 3, ARD, ZDF, RTL, SAT1, PRO7 / **France**: TF1, FRANCE 2, FRANCE 3, CANAL+, FRANCE 5 before 7pm, ARTE before 7pm, M6 / **Spain**: LA1, LA2, TELE5, ANTENA 3, regional channels FORTA / **Italy** : RAI UNO, RAI DUE, RAI TRE, CANALE 5, ITALIA 1, RAI DUE, RAI TRE, RETE 4, LA 7 / **United Kingdom**: BBC1, BBC2, ITV1 (inc. GMTV), CHANNEL 4+ S4C, CHANNEL 4 +1, FIVE) / **United States**: ABC, CBS, NBC, FOX, WB, UPN, PAX affiliates.

* Historical leaders in 2003 and the 1st half of 2014: **Germany**: ARD 3, ARD, ZDF, RTL, SAT1, PRO7 / **France**: TF1, FRANCE 2, FRANCE 3, CANAL+, FRANCE 5 24/24h, ARTE 24/24h, M6 / **Spain**: LA1, LA2, TELE5, ANTENA 3, regional channels FORTA / **Italy**: RAI UNO, RAI DUE, RAI TRE, CANALE 5, ITALIA 1, RETE 4, LA 7 / **United Kingdom**: BBC1 SD+HD, BBC2, ITV SD+HD (inc. Bfast), ITV+1, CHANNEL 4, CHANNEL 4+1, CHANNEL 5, CHANNEL 5+1 / **United States**: ABC, CBS, NBC, FOX, CW, UNIVISION, TELEMUNDO, UNIMAS, AZTECA AMERICA, ION, ESTRELLA TV affiliates.

20 Years of World Cup…

Top 1 - 1994		Top 1 - 2014	
Final - Brazil Vs Italy 10.1 Million (share 62.1%)	2	France Vs Germany 16.9 Million (share 71.8%)	TF1
Netherlands Vs Ireland 6.3 Million (share 89.7%)		Argentina Vs Netherlands 9.1 Million (share 88.0%)	
Bolivia Vs Spain 11.6 Million (share 69.2%)	1	Spain Vs Chile 13.2 Million (share 67.6%)	5
Germany Vs Bolivia 19.4 Million (share 61.3%)	ARD	Germany Vs Argentina 34.6 Million (share 86.2%)	ARD
Final – Brazil Vs Italy 13.6 Million (share 56.7%)	BBC one	Final – Germany Vs Argentina 14.9 Million (share 53,1%)	BBC one

Third highest level of TV viewing ever*

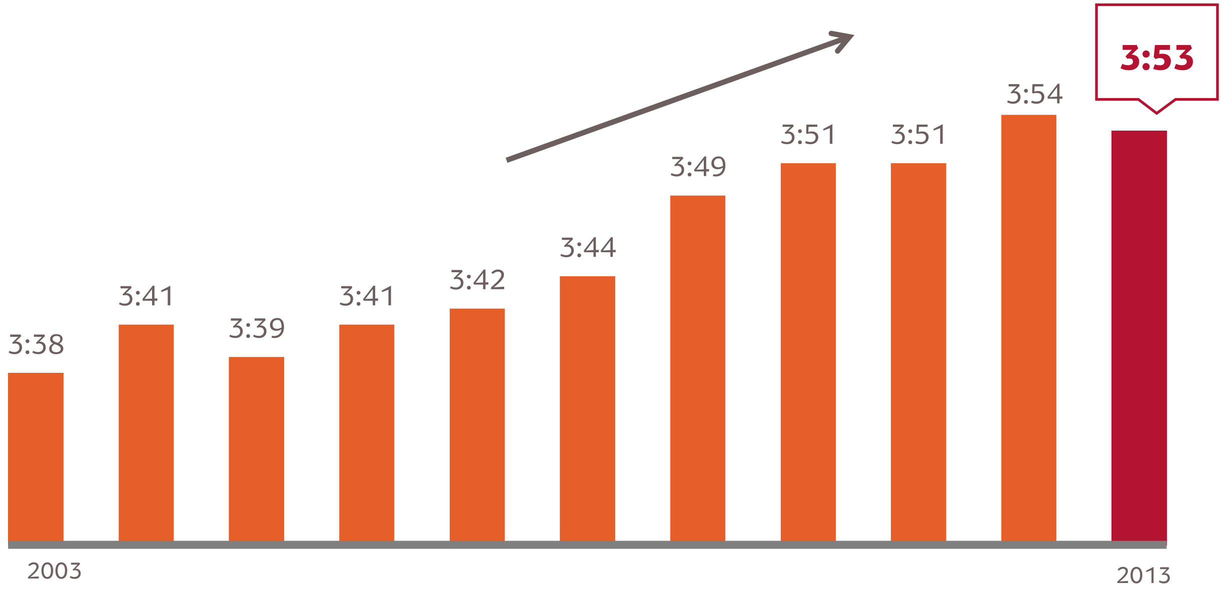


Based on total individuals, total day. Time shifted viewing included when measured.

* Third highest daily viewing time (since China has been included to the panel in 2003)
** In the Middle East, only Lebanon, Israel and the United Arab Emirates have people meter systems over the studied markets
*** In Africa, only South Africa and Morocco have people meter systems over the studied markets

TV consumption: +15 minutes in 10 years

Mega panel* 2003-2013 of 48 countries



Average
daily viewing time
per individual

Based on total individuals, total day. Time shifted viewing included when measured.

The averages are weighed according to the size of the universe "total individuals".

* Mega Panel Eurodata TV (48 territories): Austria, North Belgium, South Belgium, Bosnia-Herzegovina, Bulgaria, Canada, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Indonesia, Ireland, Israel, Italy, Japan, South Korea, Lebanon, Malaysia, Mexico, The Netherlands, New Zealand, Norway, Philippines, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, South Africa, Spain, Sweden, Switzerland (French, German, Italian), Taiwan, Thailand, Turkey, Ukraine, United Kingdom, United States, Venezuela, Vietnam.

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Comparing national consumer trends and habits

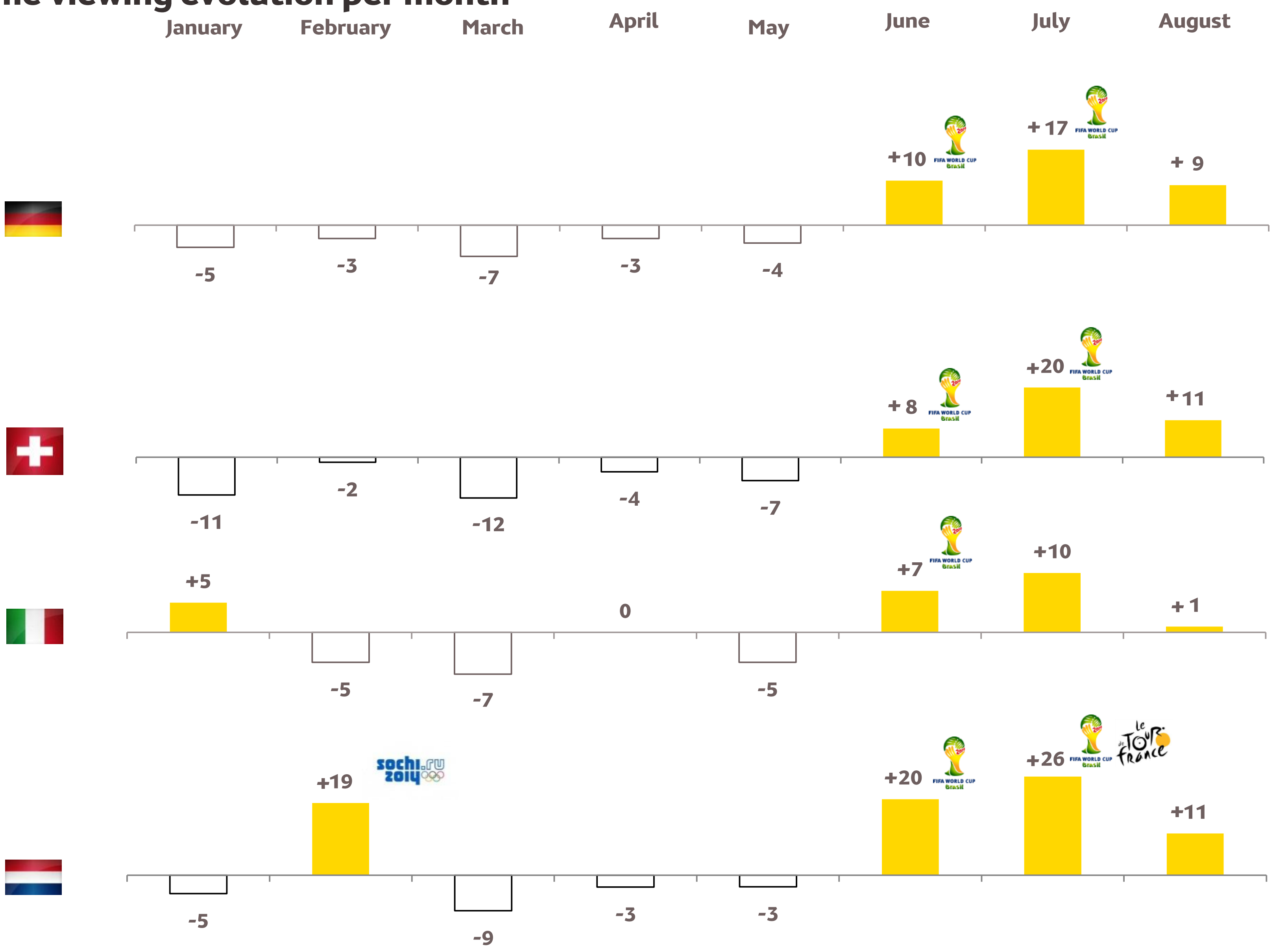
Total Individuals

Live
PC
Catch Up TV
Replay
OOH Out-of-home

Country	Channels	Viewing time	Change
Netherlands	>65	3h21	+7'
Norway	>120	2h38	+3'
Italy	>200	4h27	+1'
Germany	>90	3h42	+1'
Spain	>140	4h04	-5'
France	>120	3h43	-7'
United States	>130	4h45	-8'
United Kingdom	>290	3h40	-13'

Methodology:
Audience measurement: Live + consolidated viewingexcept for Spain. Audience PC measurement for Norway over the period January-June 2014 and out-of-home viewing from July 2014.
Target: Total individuals.
Period: January-July 2014 vs January-July 2013

Audience time viewing evolution per month



Target: Total Individuals. Period: January-August 2014 Vs January-August 2013

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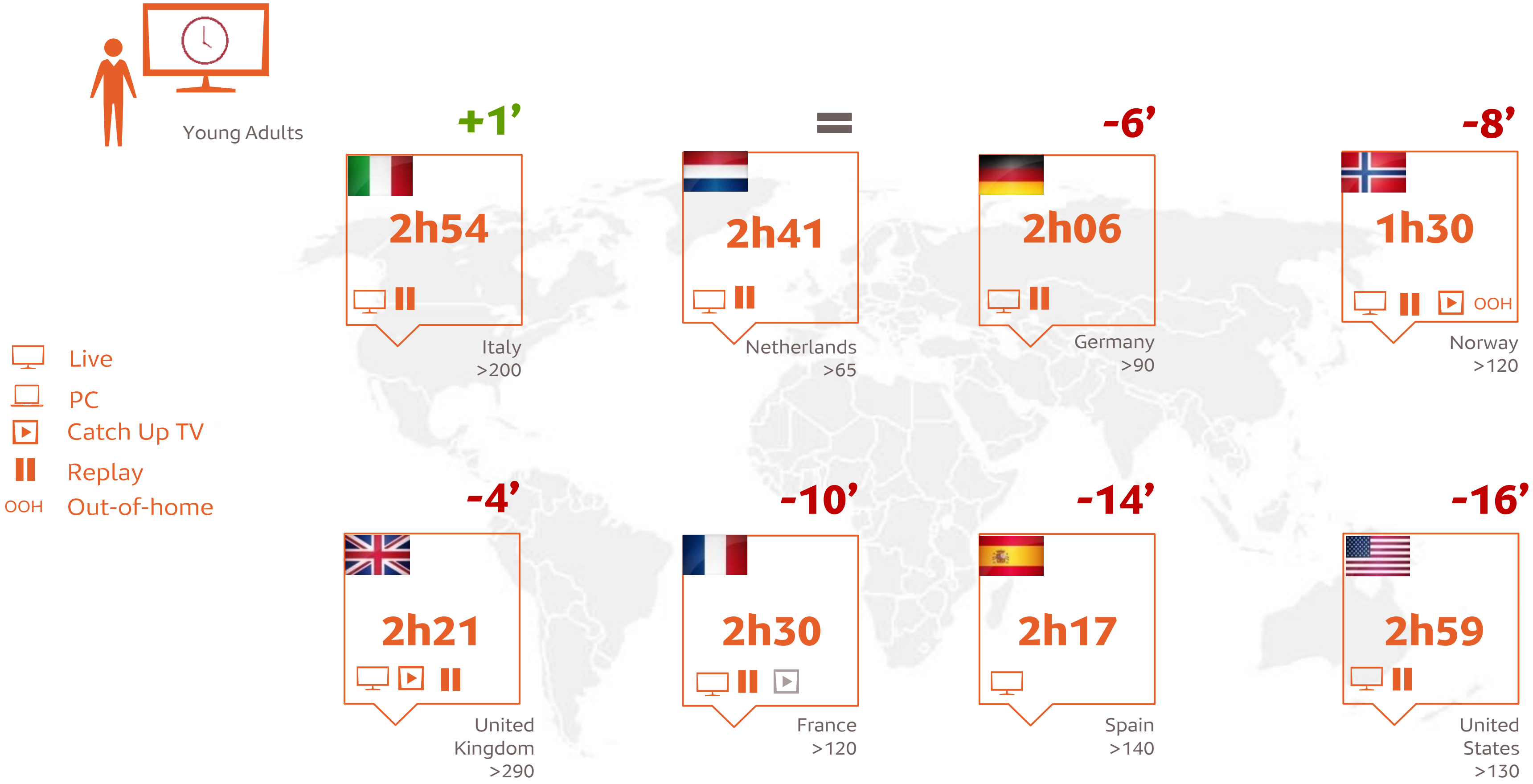
Young adults elude the television screen



Methodology:
Audience Measurement: Live + consolidated viewing except for Spain. Audience PC measurement for Norway over the period January-June 2014 and out-of-home viewing from July 2014.
Target: Germany: Individuals 14-29; Spain: Individuals 15-25; France: Individuals 15-34 ; United Kingdom: Individuals 16-24; Italy: Individuals 15-34; United States: Individuals 15-24; Netherlands: Individuals 20-34; Norway: 15-24.
Period: January-July 2014 vs January-July 2013

TV viewing boomed all over Europe thanks to the FIFA World Cup...

Total Individuals

Evolution July 2014 Vs July 2013 :

ARD	NPO 1	Rai 1	TF1
+17 min	+26 min	+10 min	+7 min

Best audience in July 2014:

Germany Vs Argentina 34.7 Million (Sh%: 86.3 %)	Argentina Vs Netherlands 9.1 Million (Sh% : 88.0%)	Germany Vs Argentina 14 Million (Sh%: 56.5%)	France Vs Germany 16.9 Million (Sh%: 71.8%)

FIFA WORLD CUP Brasil

...which also boosts Out-of-home viewing on a global level.

France	Kazakhstan	Norway	Finland
Group stage games	FIFA World Cup	FIFA World Cup	FIFA World Cup
+4.5% of additional audience	28.9% of global audience	30% of global audience	2.6% of global audience
OOH + other screens	OOH	OOH	Secondary Homes

- OOH viewing:
- France: Médiamétrie - Global TV study
- Kazakhstan: TNS Gallup Media Asia: TV index study (cities 100 000+), 6+ years, 2014 FIFA World Cup matches, 12.06.14-13.07.14
- Norway since July 1st, 2014 on Adults 2+. Measure of OOH audience thanks to Artitron people meter
- Finland: Adults 10+. Measure mentof OOH audience thanks to the people meter. 1st channel Eurasia

Number of occurrences in international program rankings of the 70 covered territories in the study.

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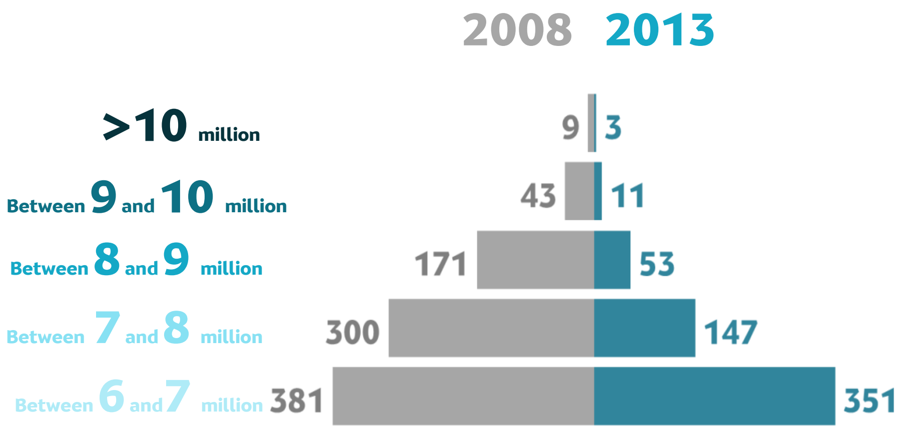
Global brands and local series still have a strong potential

Broadcasts ranked by number of viewers
duration > 15 minutes



The power of global trends

FremantleMedia Enterprises — 14

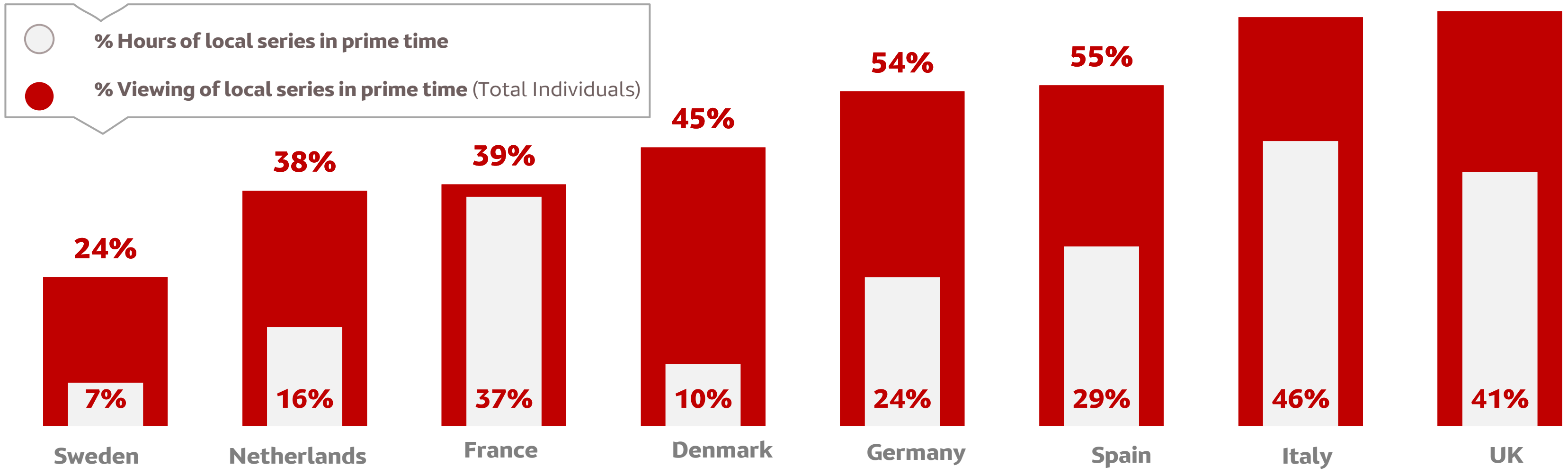
TOP AUDIENCES	
> 60%	GEORGIA
> 60%	MOLDOVA
> 60%	SLOVENIA
> 50%	UK

Talpa Distribution — 15

TOP AUDIENCES	
62.1%	CANADA
52.0%	PHILIPPINES
52.4%	BULGARIA
#1 & # 3	VIETNAM

Period: January June 2013

Local production in Europe: booster of prime time audiences



- % of local series in national offer (in hour) and viewing (in audience) – based on prime time. Period: September 2012 – June 2013
- Source: Eurodata TV Worldwide / Scripted Series Report 2013 / Relevant partners

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New ways of watching TV content

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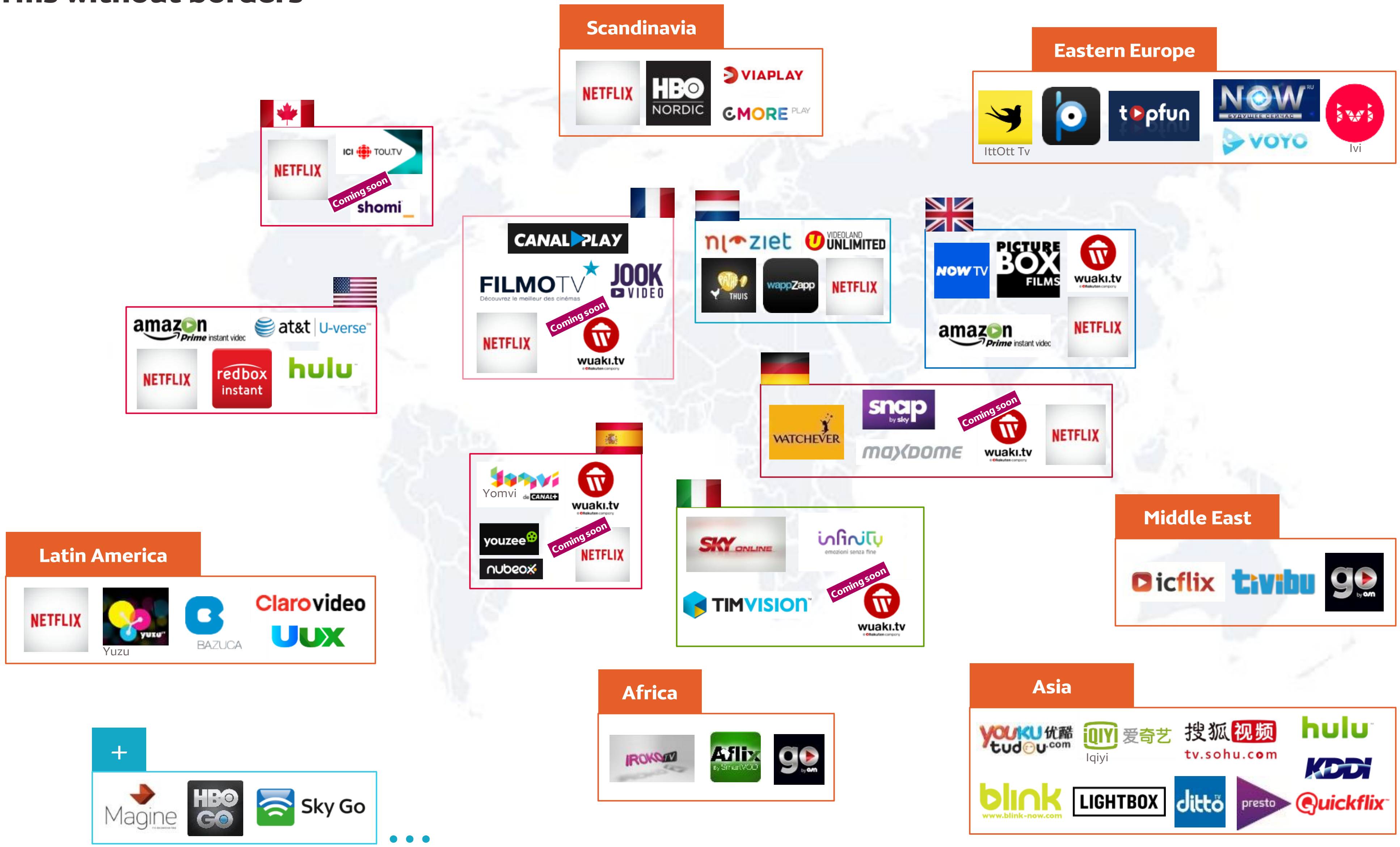
Platforms without borders



The multiscreen consumption has increased and complete linear consumption

Netherlands - % video content consumption per type of screen

13 +

TV	76%
Computer	9%
Laptop	7%
Tablet	4%
Smartphone	4%

France – key figures for the use of catch-up TV

15+

1 of 2 French consumers

viewed catch-up TV in the past 12 months

15-24

#1 **40.8%** In the past 12 months — **Screen** the most used

#1 **12.6%** In the past 12 months — **Target** that consumes the most

Tv content viewing in streaming is growing

FIFA World Cup– Final Germany vs. Argentina

2.4 M
In Live+VOSDAL+7 Days

> 58,000
Streaming

Series - Goede Tijden Slechte Tijden

1.9M
in Live+VOSDAL+6 Days

> 192,000
Streaming

- Sources:
- Médiamétrie (France): Global TV study, Wave 13 April-June 2014. Basis: population total individuals 15+ : 51,271,000 individuals
- SKO Stiching Kijdonkerzoek (Pays-Bas): Moving Pictures 2013.
- MMS Mediamatning I Scandinavien (Sweden / SKO Stiching Kijdonkerzoek (Netherlands)

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The time shifted viewing impact

- Live
- Live + Vosdal
- Live + Vosdal + **7** Days
- Live + Vosdal + **7** Days + **28** days
- On Demand

3h21 **+9'**

3h43 **+4'**

4h28 **+4'**

3h40 **+27'**

3h44 **+31'**

Methodology:
Audience Measurement: Live + consolidated.
Target: Total individuals.
Period: January-July 2014 vs January-July 2013

Broadcast 20/03/2014

3.4 M
in Live+VOSDAL+7 days

+22%
vs. Live

Broadcast 01/01/2014

13.2 M
in Live+VOSDAL+28 days

+93%
vs. Live

BBC ONE

Hartswood Films / BBC Drama

Broadcast 01/01/2014

15.4 M
in
Live+VOSDAL+7 days

+75%
vs. Live+VOSDAL

NBC

Sony Pictures Television Distribution

Evolution of the proportion of consumption:
Homeland S3 (2013) vs. Homeland S1 (2011)

28%	**+7 points**
23%	**+1**
17%	**+5**
32%	**-13**

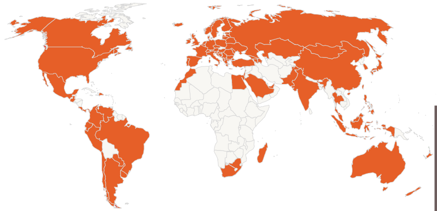
Source: Showtime, Nielsen, Rentrak

Audience measurement in evolution

88
Countries Eurodata TV Worldwide

76
Countries with people meter system

5
Countries measures OOH viewing



22
Countries measure time shifted viewing

10
Countries measure TV viewing on the PC

Currency measurement evolution:

The latest and upcoming
- Finland: **PC viewing** (April 2014)
- Norway: **Out of Home viewing** (July 2014)
- France: **catch up TV (**September 29th, 2014)
- Netherlands: **Video Total** (Final quarter of 2015)
- UK: **PC viewing** (2016)

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved

« The dramatic crisis of Hollywood and the desperate battle of next process against Television »

Key take away

Television remains and will remain a **powerful** media

The usages are evolving rapidly and the television offer enables you to **manage your time**

Non-linear offers remain and will remain **complimentary offers**

The more there will be choice, the more viewers will need to be on medias that hold **a strong editorial identity**

The role of TV channels are evolving, content publishing aggregators and creative events

We are at the dawn of a **new cycle where content will be key drivers of change**

Until then, **technological developments** are preparing tomorrow's innovations: 4K, 8K, 4G, Occulus, video games…

For further information…

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