GfK VIEWSCAPE: ARE YOU READY TO ADAPT TO THE CHANGING VIDEO LANDSCAPE?

What sources of video are people using and what is the total time they spend viewing?

How does live scheduled TV fit into peoples lives now that they have more options for watching what they want, when they want it?

What is the role of devices such as Smart TV's and streaming players?

What are people prepared to pay for and how are new OTT services affecting traditional pay TV models?

GET THE ANSWER TO THESE AND MORE QUESTIONS IN GfK'S 2017 STUDY OF THE TOTAL VIDEO LANDSCAPE

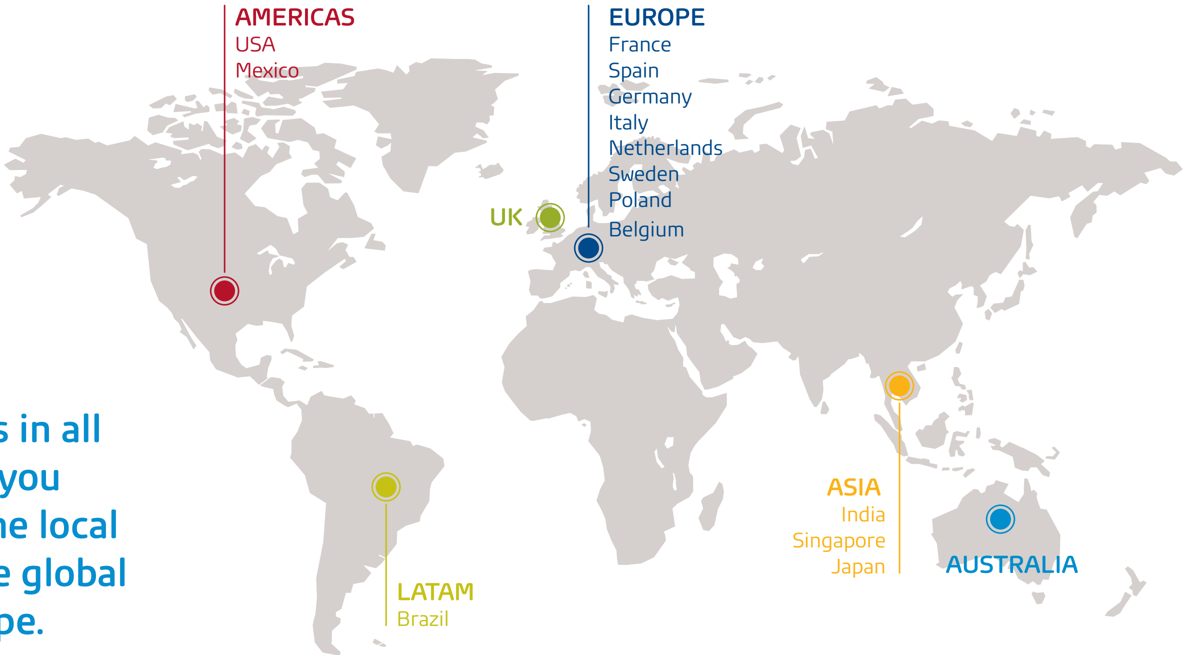
The media industry is experiencing a revolution. Viewing behavior is transforming radically and viewers are migrating away from live TV to some degree – although not from video altogether. As the TV set becomes "smart", and as availability of connected devices allow viewers to watch content when they want and where they want, it is increasingly difficult to truly understand the totality of video consumption. Furthermore, this is happening at varying speed and with varying complexity in different markets. What are the threats, and what are the opportunities presented by this new visual ecosystem and is your business equipped to react to these new behaviors?

Building on wave one, the 2017 study further explores total video consumption. The single source approach captures audience behavior and attitudes to a wide variety of video providers. This will give you a greater understanding of how linear and online forms of content distribution fit together.

Whether you are a broadcaster, producer or distributor of content, ViewScape provides the answers you need to understand how your business should adapt to the dynamic world of video consumption.

Covering over 25,000 respondents, aged from 2+ in 16 markets across the world, GfK's ViewScape provides a unique picture of the total video ecosystem.

Global scale and local expertise
We currently cover 16 markets, with a plan to add more in 2017.



Media experts in all markets help you understand the local nuances in the global video landscape.

The ViewScape study focuses on three key areas

Current behaviors / ecosystem	Current consumption	Future behaviors

The research is carried out online with a survey of 1,250 adults (aged 18+), plus 300 kids (aged 1-17 years) in each market.

We capture nine activity types

LINEAR

88% Any Linear

- 50% Pay linear TV
- 38% Only free linear TV

NON-LINEAR

84% Any Free

- 79% Free online Videos
- 49% Free on demand and catch Up TV
- 14% Piracy/other

39% Any Paid

- 27% SVOD
- 22% Paid for (DTO)
- 13% Paid for (rental)
- 32% Paid offline DVD/Blu-Ray

% of all online adults that currently use …

And use a brand-led approach to correctly categorize activities

We identify viewing behaviors across six content types

- Movie
- TV program / series
- Short form online video
- Long form online video
- Music videos
- Promotions / trailers

And four screens

And provide an understanding of the wider home device / brand ecosystem

The data above are averages from 16 measured countries. These data for the Dutch market are available for a fee.

Demographics	Providers	Devices	Consumption	Value of content	Future intent
Gender Age H/hold composition H/hold income Working status	Awareness and usage (current / previous) Type of usage – free, paid, trial, bolt-on, premium channels Frequency of usage Reasons for choosing service Spend, satisfaction and value for money	Ownership and access to tech devices Devices used to access content Tech device brands used Access to TV/home services Brands used to access TV/home services	Approach to content selection (habitual behaviours and prioritisation) Time spent viewing types of content, by provider and device on 'last day of viewing' Who with and where viewed	Genres viewed Viewing behaviours (binge viewing, second screening etc) Attitudes towards content Importance of content in sign up	Likelihood to continue using services Reasons for switching / cord cutting / cord shaving Reasons for continued subscription Most important video source Changing viewing habits

Kids
Consumption on 'last day of viewing' Providers used Devices used and owned / connected to TV Choice of viewing Genres being viewed

Timeline
Fieldwork is conducted in November and December 2016. The market insights for the Netherlands are already available.

2017 official price for the Dutch Report
Deliverables include a detailed PowerPoint report containing an Executive Summary and respondent level data is available in Excel or SPSS if required. The Dutch report costs €5.500. It is also possible to buy a special kids module for €2.240 (prices are excl. VAT). Depending on your budget and data needs, other possibilities can be discussed.

We will work with you to create a custom subscription bundle that includes only the reports you want.

Questions? Contact us

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GfK VIEWSCAPE - CONTENT DETAILS

Demographics and respondent details

- Age (actual) gender, region (all used as quotas)
- Type and size of household, presence, number and ages of children
- Working status and HH income
- Devices with access to and personally used
- TV set type – smart/not smart, if smart whether connected to the internet
- Weight of television viewing question – typical hours viewed to identify heavy/medium/light viewers

Pay TV

- Awareness and usage of Pay TV providers (separate lists for each market individually)
  – Total aware
  – Current users
  – Previously used
  – Never used
  – Never heard of
- For previously used (churn), whether cancelled within the last 12 months
- For any brand previously used, reasons for churn
- Pay TV types – for certain markets (Japan, Sweden, NL and Germany) whether pay TV is direct to provider or via third party/bundled with other utilities/bundled but with add on package
- For multiple users, pay TV provider on set used most often
- Whether TV Everywhere app is used and on what devices
- Other Pay TV options – premium movie/sport/kids/international/specific channels/multi-room
- For non users of each brand whether likely to take out or switch provider in the future
- For users of each brand unlikely to continue using in the future, reasons why
- Cord shaving – premium users likely to downgrade and reasons for downgrade
- Monthly spend (in local currencies) on all paid for video services – Pay TV/PPV/DTO/SVOD/DVD

Awareness and Usage of other video content providers

- Note for all categories, brands covered vary by market (around 50 different brands are covered in each market including a number of 'global' brands such as YouTube, Facebook, Apple iTunes and Netflix)
- Free On Demand/catch up TV
- Free online video websites and apps – includes legal and illegal provider brands
- PPV providers
- DTO providers
- SVOD providers – including OTT and broadcaster/TVplatform providers
- For all the above plus free to air TV channels/pay TVchannels /DVD&BluRay disks, frequency of usage – every day or most days/once a week/few times a month/once a month or less often/never watch but someone else in HH does/no-one watches
- For all of the above individually – are you watching more or less compared to 6 months ago?

SVOD

- Whether recent sign up related to new original releases (Amazon and Netflix only)
- Main reasons for sign up – library/original series/watch when I want/exclusive programs/wanted more choice/cheaper than Pay TV/good value/enabled on other devices/children wanted it/recommended to me/free shipping (Amazon Prime only)
- Type of access – continuous monthly subscription/currently use via monthly pass/currently use via free trial or promotional offer/ via friend or family account/previously used via paid for subscription/
- For non-users, whether likely to take out a subscription in the future
- For all users unlikely to continue using, reasons why
- For previously used, reasons why stopped using

Attitudes

- Satisfaction with all video provider brands used (mark out of 10)
- Value for money for paid for services (mark out of 10)
- Likelihood to continue using in the future including separate question for pay TV premium services
- Importance of video services – if users could only use one service which would it be?

Time spent

Each respondent is asked to record in detail the time they spent watching video YESTERDAY (or if not yesterday, on the last day they viewed).

- Provider used (brand level plus generic free to air TV channels/Pay TV channels and DVD & BluRay disks)
- Type of content – movie/tv programme or series/short form clip or video <10 mins/long form clip or video >10 mins/music video/promotion or trailer. Note this is specific to the brand used, so short form clip will not appear for eg. Netflix and movie would not appear for Facebook.
- Time of day – actual start and end time
- Device used – TV/PC&laptop/tablet/smartphone
- How many others watched the content – 1/2/3/4+
- Where viewed – home/someone else's home/work or college/whilst travelling or on the move/elsewhere
- Advertising – was there advertising before, during or after the content?

General viewing behaviours

- Genres viewed – range of genres including traditional TV genres – drama/entertainment/comedy – and online genres – vlogs, amateur video, adult content, how to/training videos
- Viewing behaviours, frequency of watching multiple episodes in a row (bingeing)/using another device at the same time to access related information (media stacking)/using a VPN to access website content in a different country/sharing opinions online about content watched/viewing on another device at the same time as watching TV/using another device for something else (shopping, browsing internet) whilst watching TV/using a computer at work/school to watch videos online
- Attitudes to watching video – agree/disagree with a variety of statements about content – discovery, international content, range and quality, importance of television to them generally
- Hierarchy of choice – users asked to rank types of content provider in terms of which they choose first, second and third when watching on a TV
- Content discovery – factors that influence content discovery including recommendation/browsing programme guide/favourite TV channels/social media/trailers and on-air promotion/advertising/provider recommendations/genre categories
- Connector devices used to watch online content on TV set (filtered on those who use TV at device question)

Other

- Providers used for mobile/broadband/landline
- Smart TV users – brand used
- Smartphone users – brand used
- Tablet users – brand used
- Laptop users – brand used
- Average internet usage