



AGF VIDEOFORSCHUNG

Video research in Germany

Frankfurt, January 2025

AGF Videoforschung GmbH

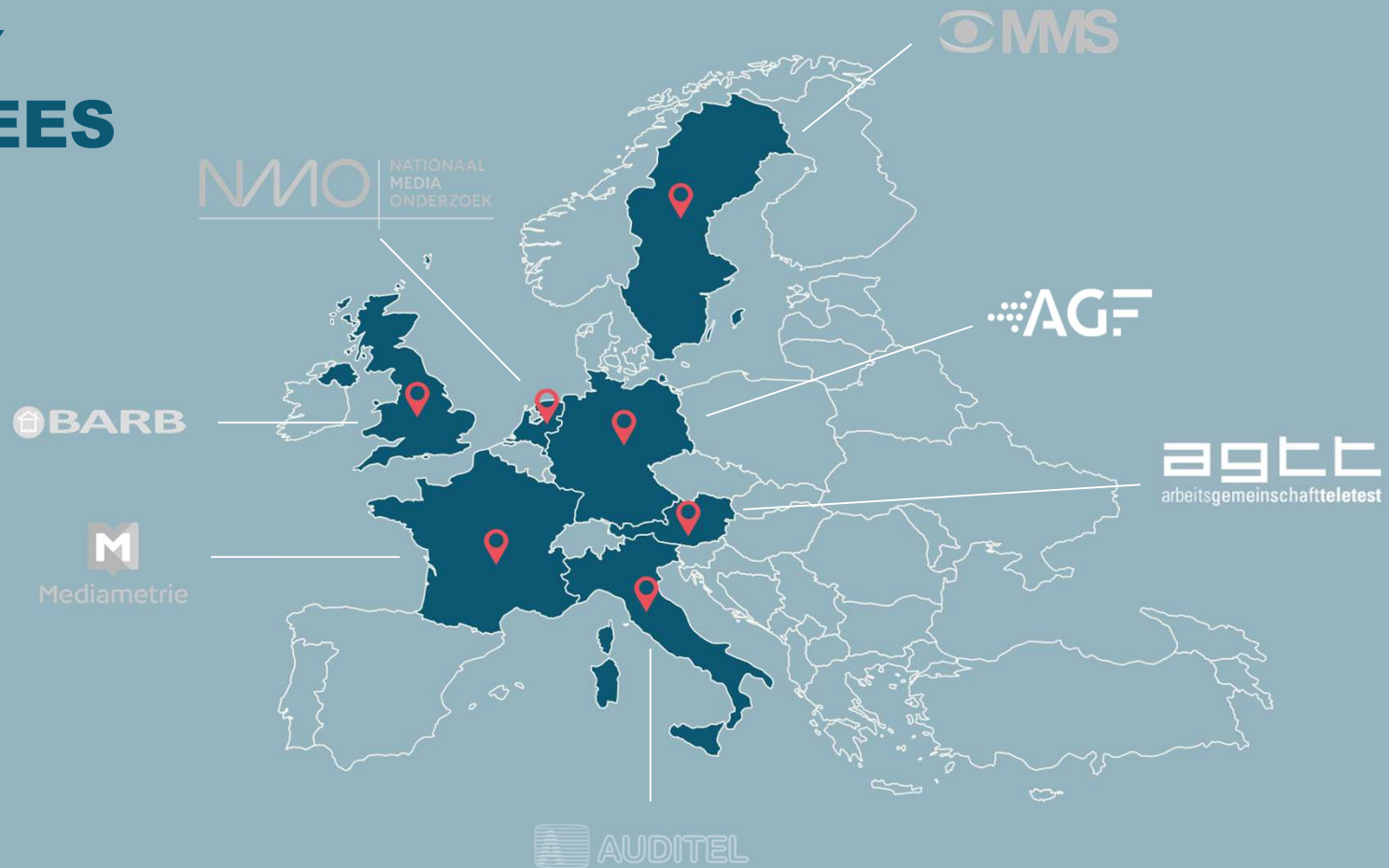
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1. REACH RESEARCH IN THE AGF SYSTEM

AGF Videoforschung GmbH

JOINT INDUSTRY COMMITTEES (JICs)





Die
Media
Agenturen



Reach research in the AGF system

A JIC in the legal form of a GmbH

Shareholders & Supporters of AGF
Videoforschung GmbH

AGF Videoforschung GmbH



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

Audience Research in the AGF System

BIG PICTURE



**SINGLE
SOURCE**

AGF-(VIDEO)PANEL

Complete measurement of linear and non-linear usage on the big screen

As comprehensive as possible measurement of video consumption across all video-capable devices used by panel members, covering all distribution channels and formats

Desktop

CTV

Mobile

Gaming-Console

RETURN PATH DATA

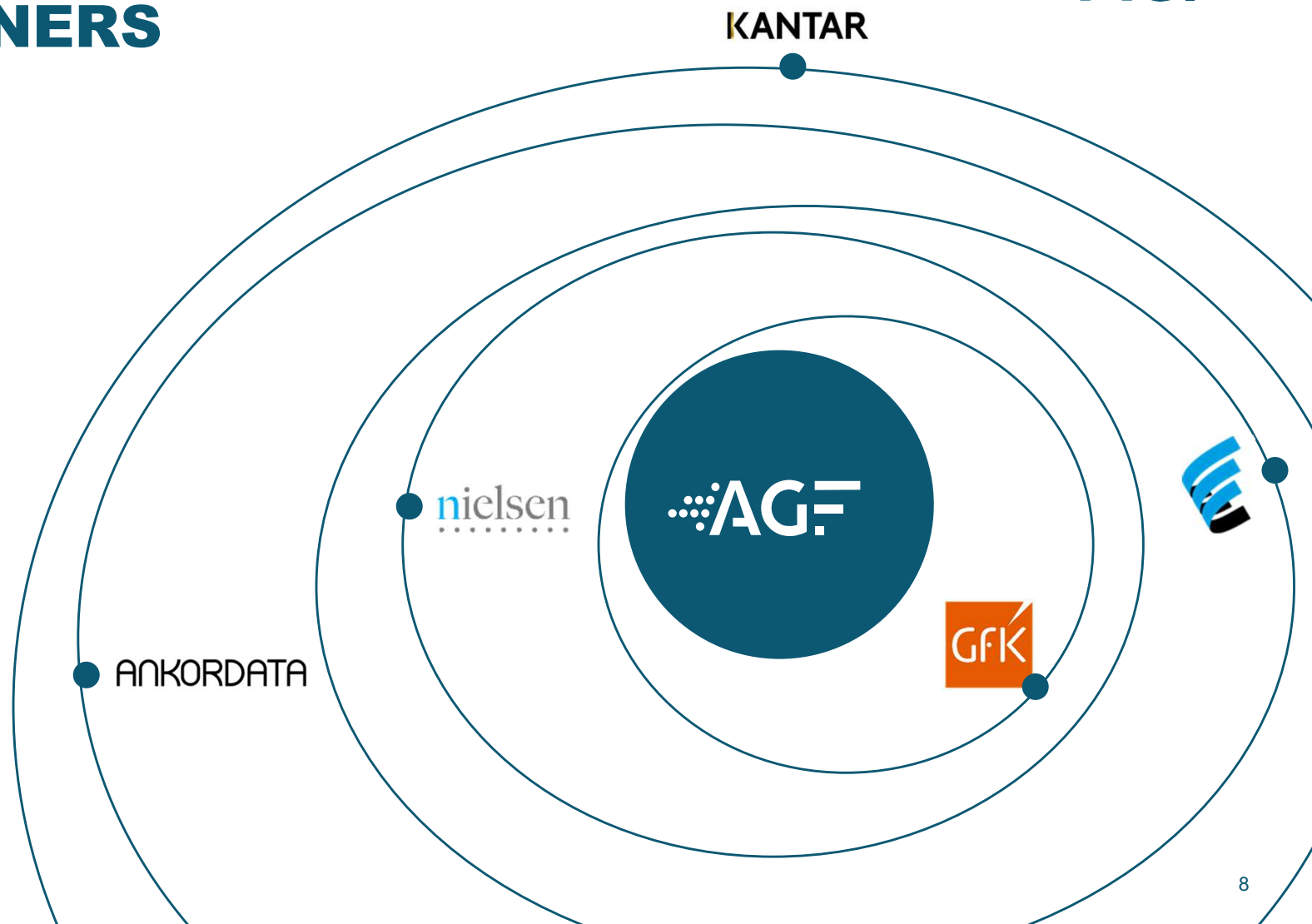
ONLINE PANELS
(mobile, desktop)

OUT-OF-HOME-MEASUREMENT

3RD PARTY DATA

Audience Research in the AGF System

STRONG PARTNERS



2. THE AGF PANEL

The AGF Panel

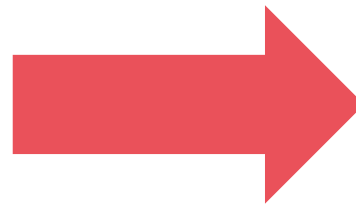


FROM TV PANEL TO AGF PANEL



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

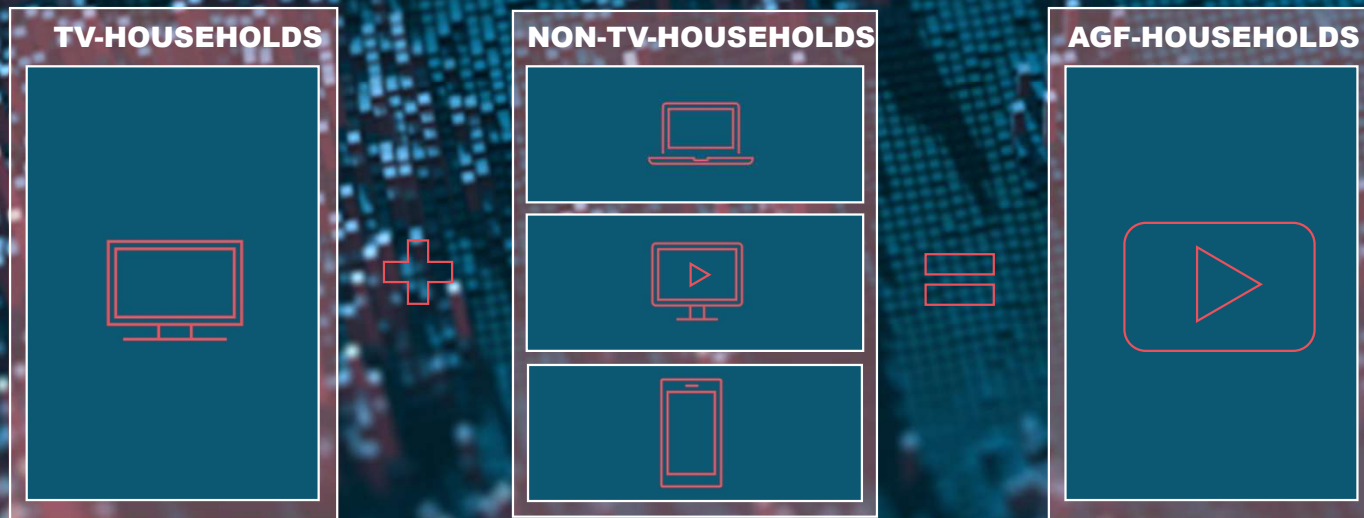


78,271 million

- 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

Market Standard for Video

TOTAL POPULATION WITHIN MARKET STANDARDS



 **38,814 Mio.**

 **75,855 Mio.**

 **1,849 Mio.**

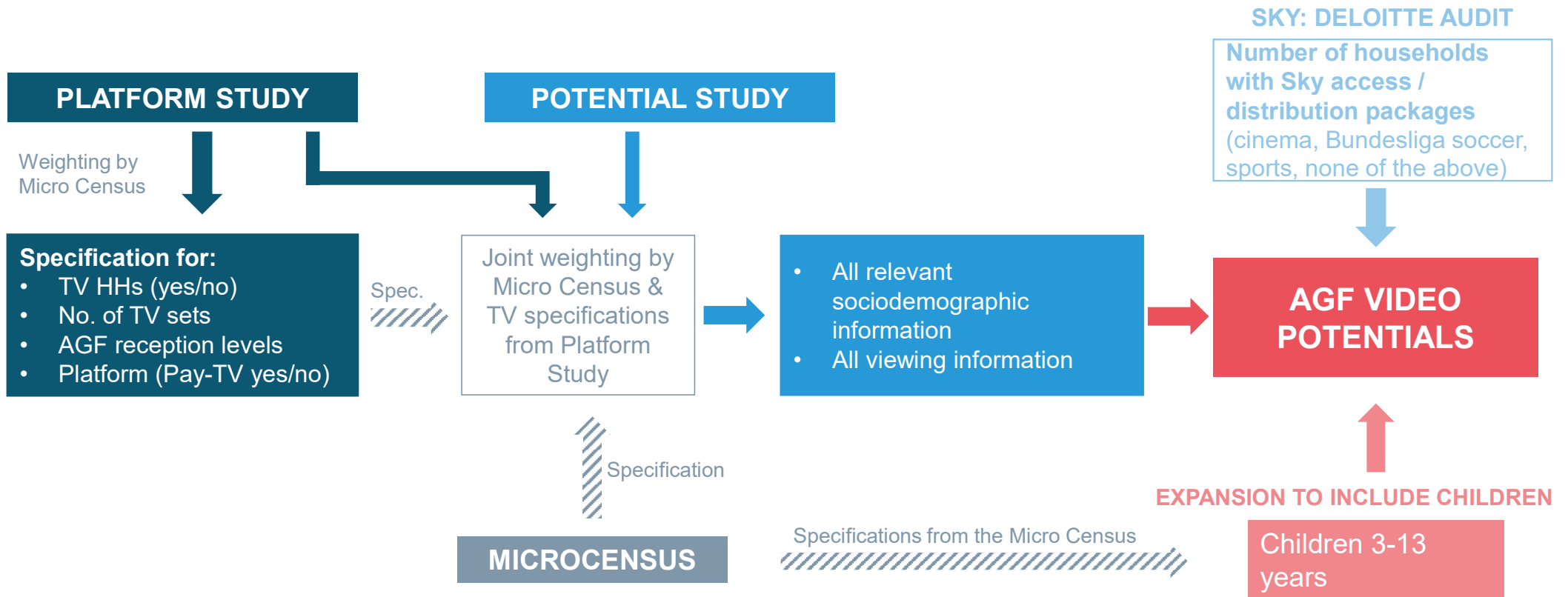
 **3,126 Mio.**

 **40,662 Mio.**

 **78,981 Mio.**

External specification

AGF VIDEO POTENTIALS

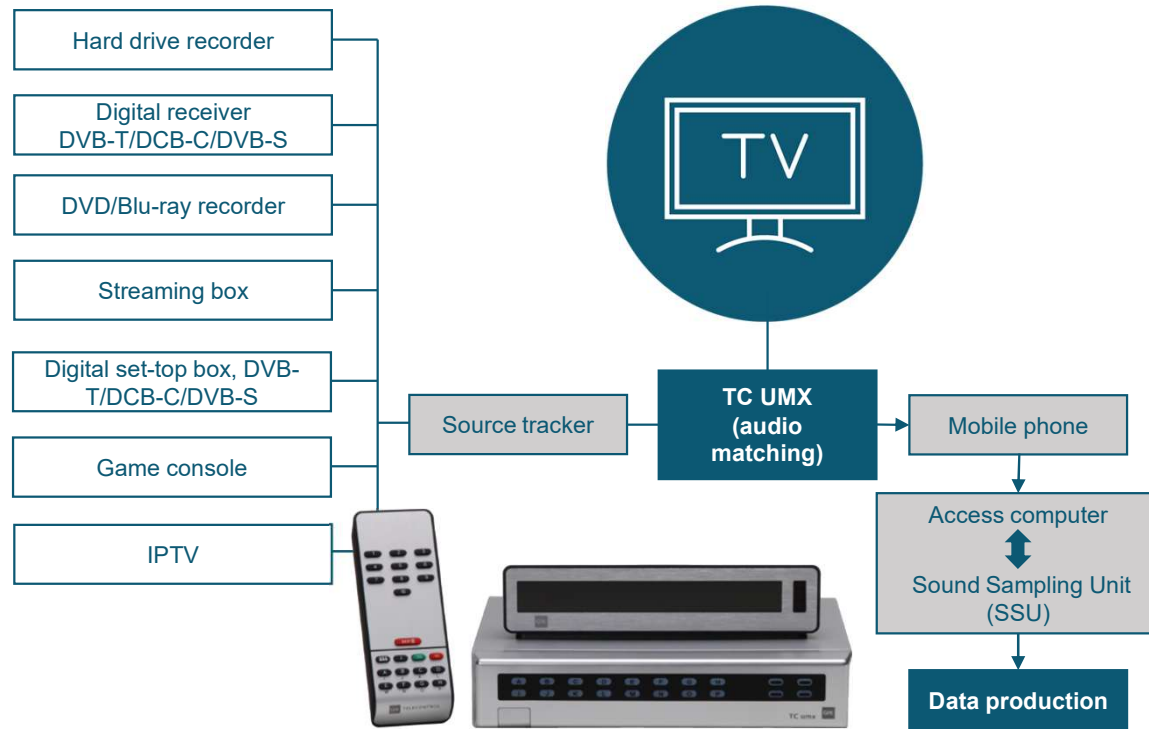


The AGF Panel

MEASUREMENT TECHNOLOGY

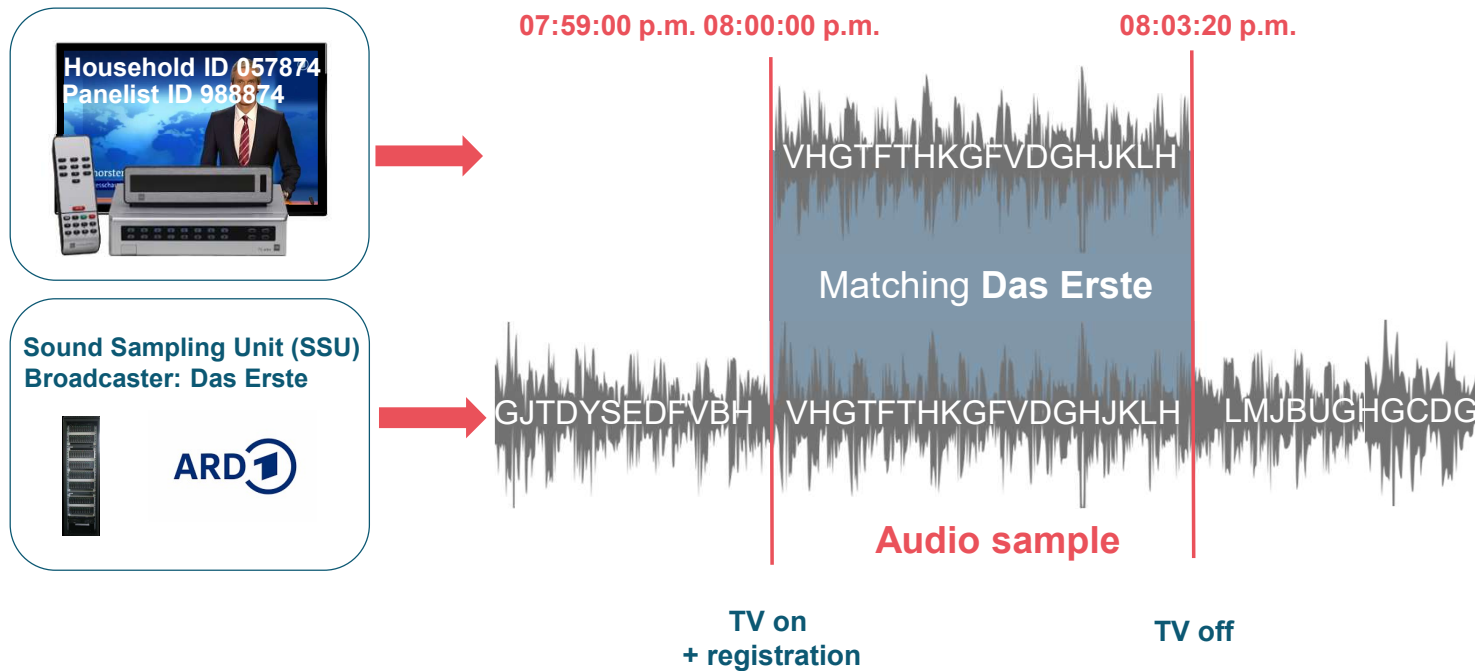
Measurement technology setup in households per TV set

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"



>30,000

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

Streaming measurement: Nielsen



STREAMING MEASUREMENT: HYBRID MEASUREMENT APPROACH

1

CENSUS MEASUREMENT



2

PANEL MEASUREMENT



Streaming measurement: Nielsen



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)

Streaming measurement: Nielsen



THE AGF MOBILE PANEL

MOBILE PANEL

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



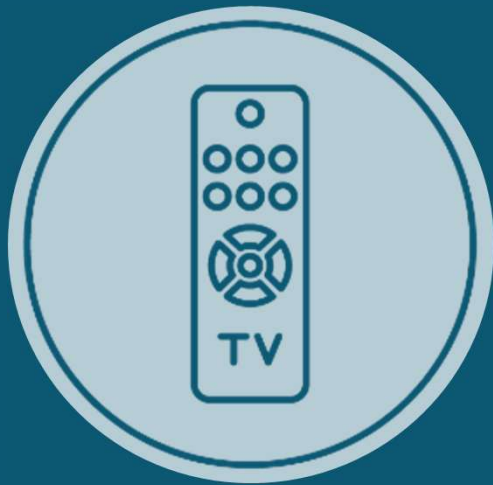
57.487 million

- 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

The AGF System



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

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

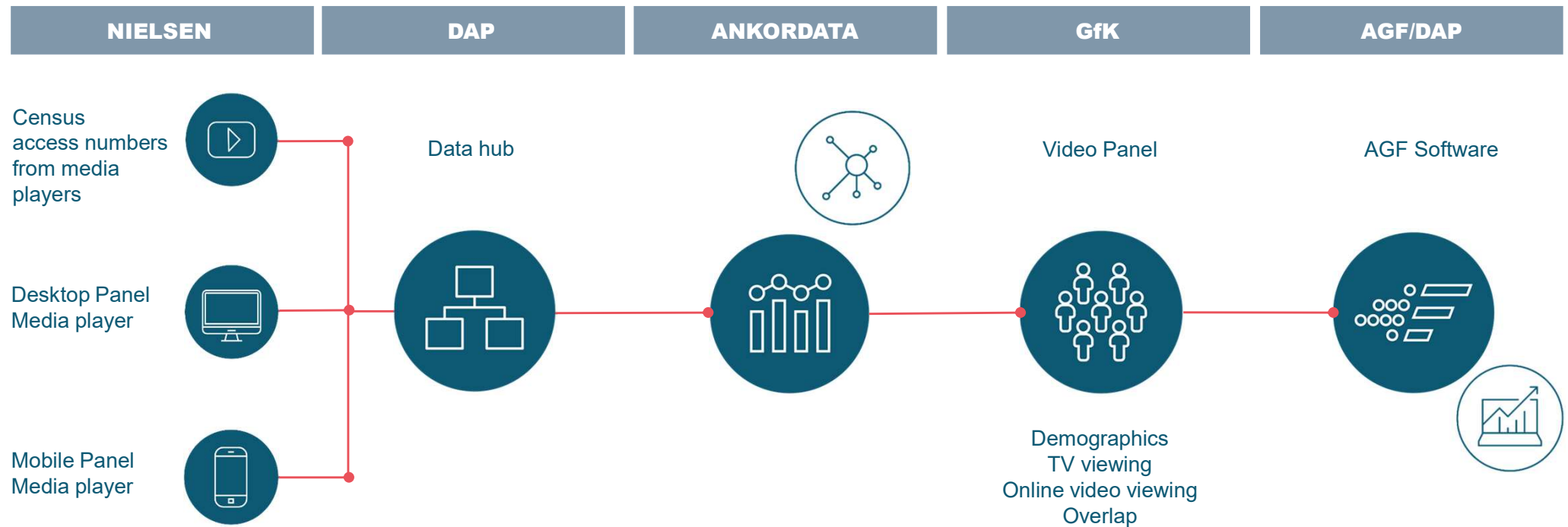
Merger
of streaming usage

Calibration
by census and model specifications

Convergence data



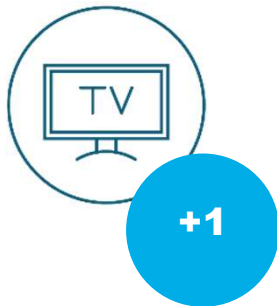
DATA PRODUCTION PROCESS



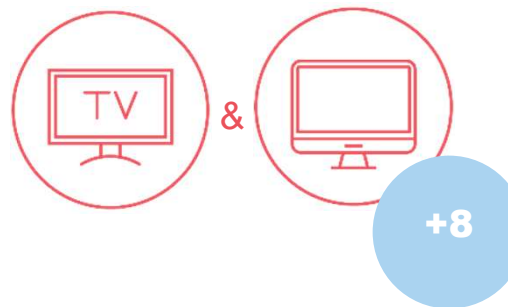
Convergence data

DAILY CONVERGENCE DATA

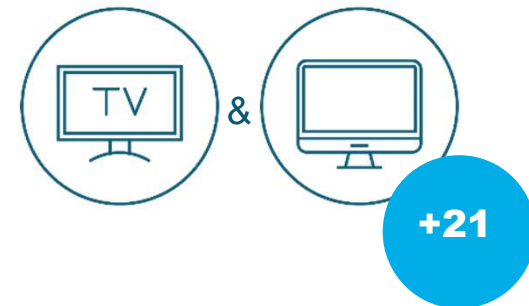
TV viewing data,
provisional



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

The word 'tatort' in a large, bold, black, lowercase sans-serif font, centered within a circular graphic that has a crosshair design.

Total viewers

37.912 million via TV

1.950 million via streaming

0.953 million via streaming exclusively

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

Source: AGF Videoforschung; AGF SCOPE 1.2; 07/31/2023-09/03/2023; various usage filters; Market standard: Video; Evaluation type: Program brand; usage-specific; Package No.: 11862 of 09/14/2023

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EVALUATION SOFTWARE

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.

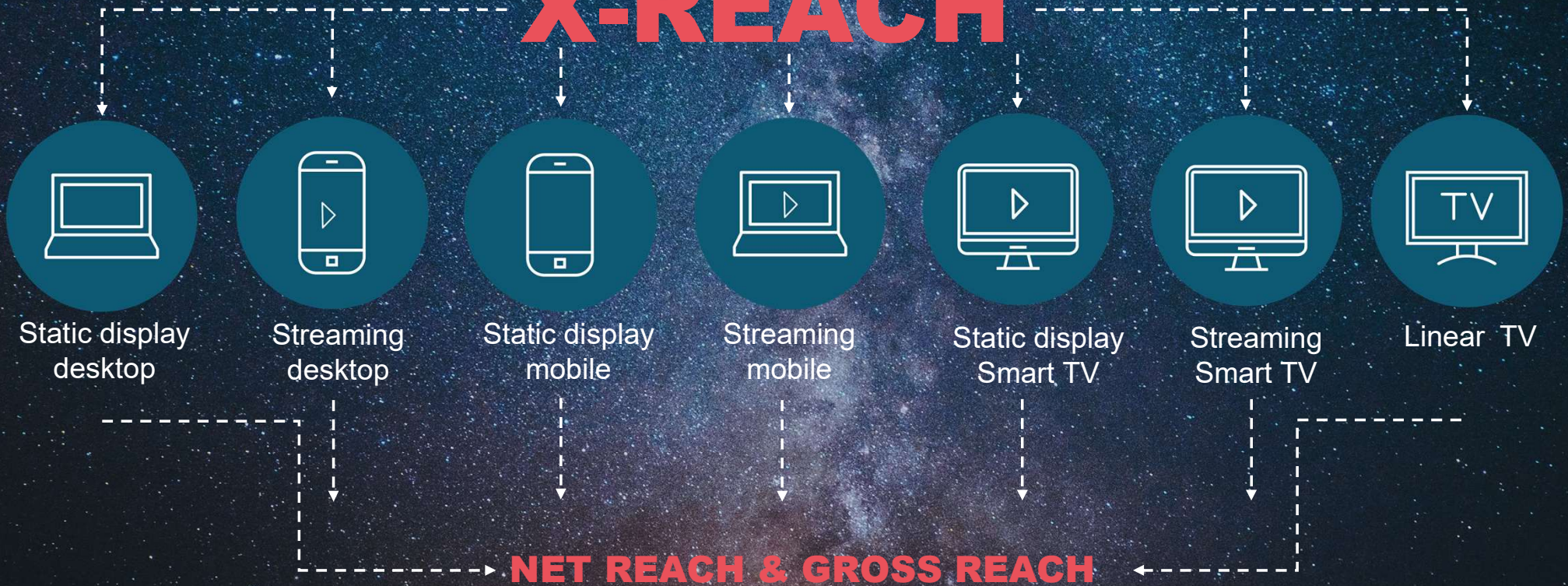
5. EXPANSION OF DIGITAL MEASUREMENT: AGF X-REACH

AGF X-REACH



BRINGING TOGETHER WHAT BELONGS TOGETHER

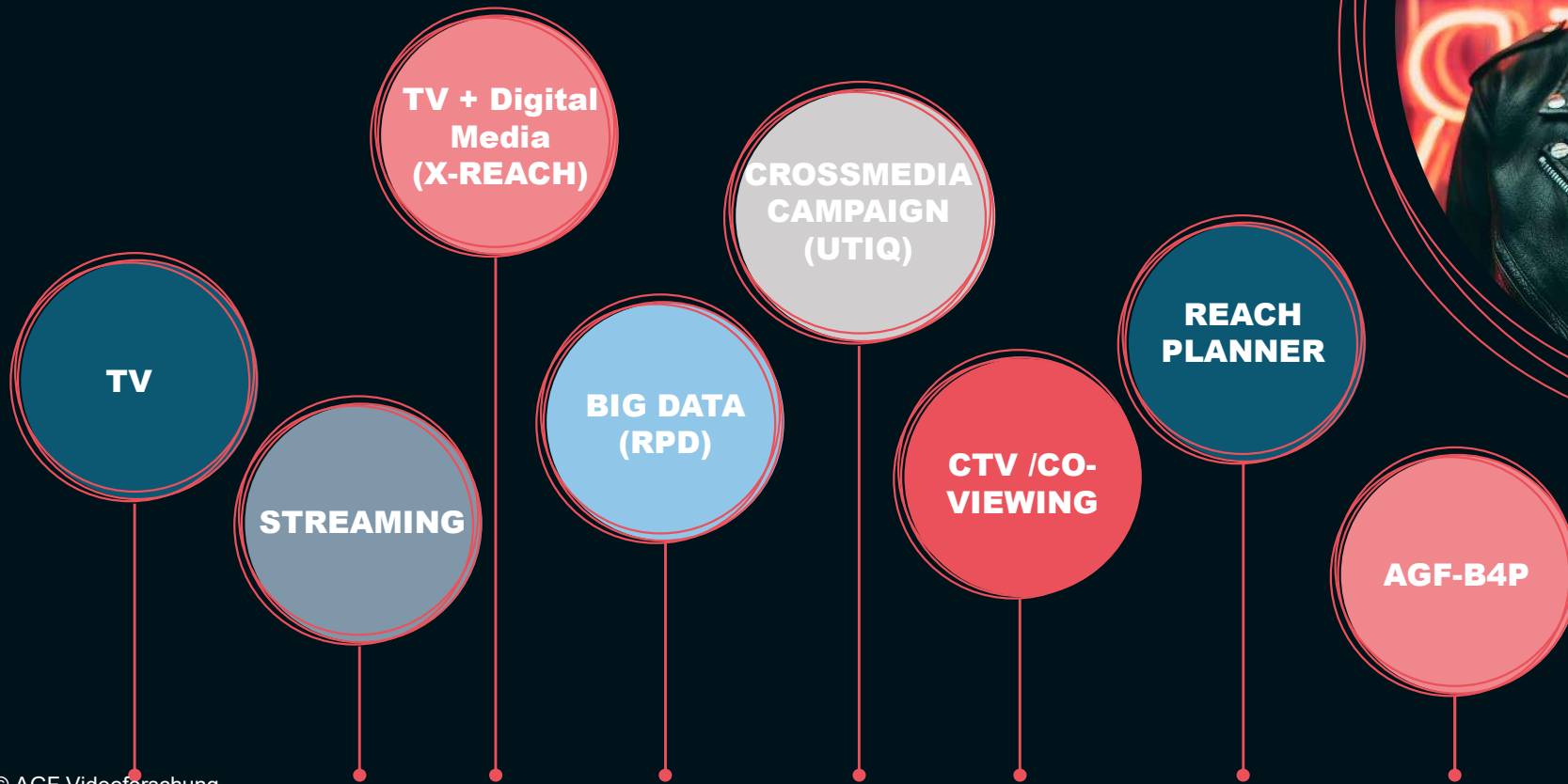
X-REACH



6. FURTHER TOPICS

Current Projects

ALONG THE USER JOURNEY



The AGF-System

COMPARABILITY IN A CROSS-MEDIA WORLD



- Advertisers have been demanding comparability for years (OWM and WFA have outlined this in their requirement papers)
- Audience data from panels plays a crucial role in verifying the reached target audience and calculating key performance indicators (e.g., GRP)
- Hybrid measurement approaches, like AGF, which combine panel data with technical measurement, provide a solid foundation for determining target group penetration, effective reach, and co-viewing information based on audience contacts
- The AGF approach offers the market a transparent, one-stop measurement solution.



Contact

www.agf.de

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