



# Redefining Audience Measurement : Loud, Confused and Incredibly Hollow

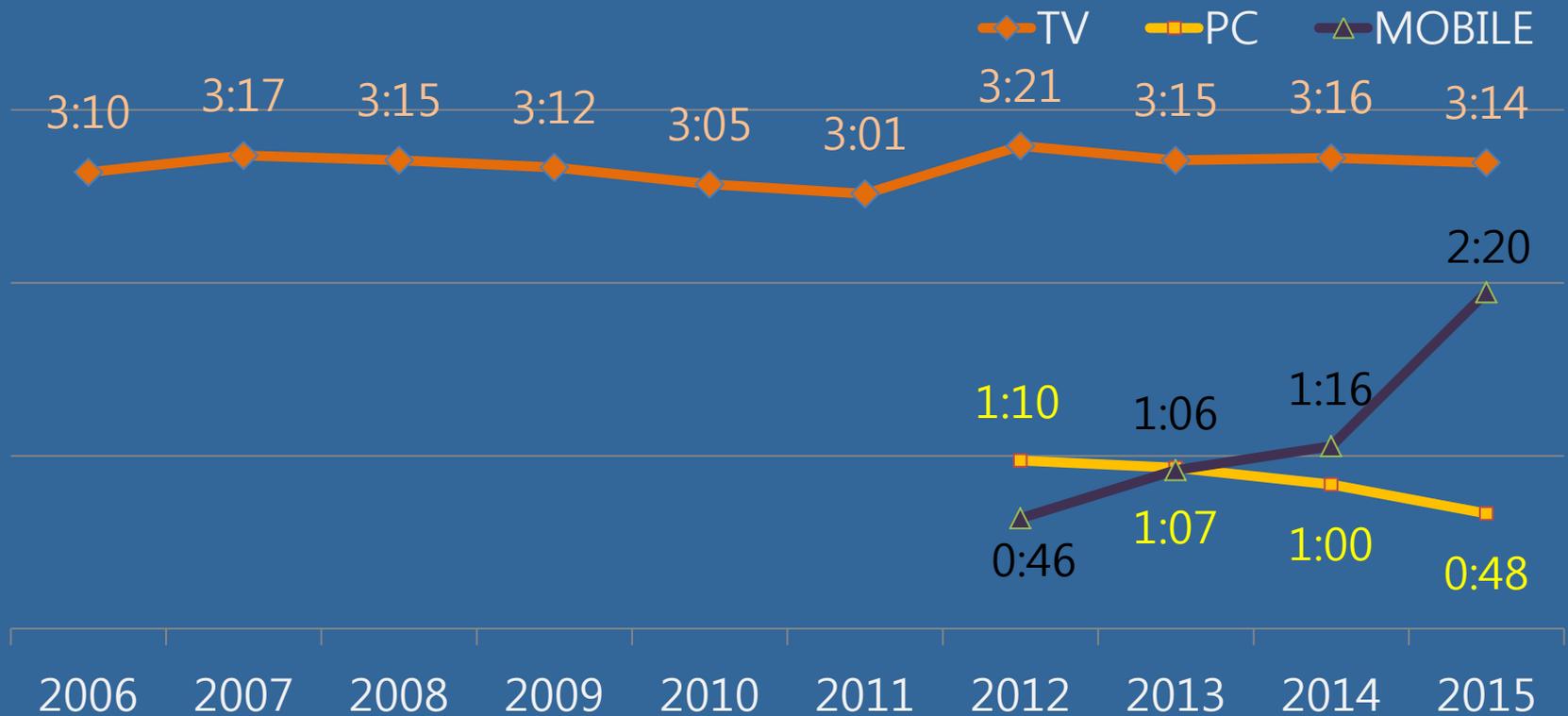
吳炯一

# 1. TV WORLD IS CHANGING

# MEDIA CONSUMPTION IS GROWING

TV is still Popular device but Mobile user Dramatically increase

Average time per day spent using communications services



# MEDIA CONSUPTION IS GROWING, BUT EACH TV CONTENT RATINGS IS SHRINKING

Korea Number 1 Drama TV Ratings (based on live viewing)



53.9%

2002~2004 Y



30.1%

2014~2016 Y

# MEDIA CONSUPTION IS GROWING, BUT EACH TV CONTENT RATINGS IS SHRINKING

Korea Number 2 Drama TV Ratings (based on live viewing)



36.6%

2002~2004 Y

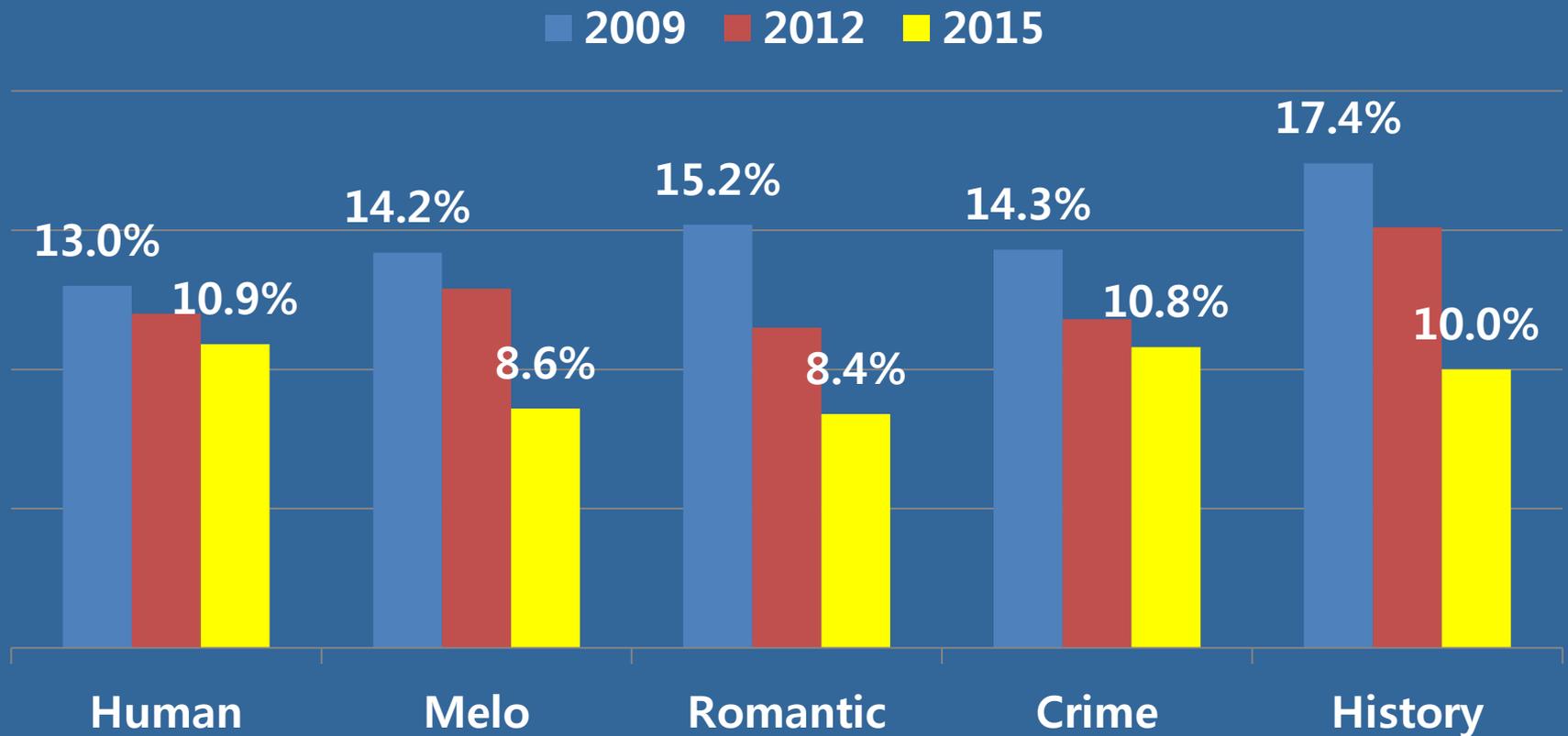


26.2%

2014~2016 Y

# MEDIA CONSUPTION IS GROWING, BUT EACH TV CONTENT RATINGS IS SHRINKING

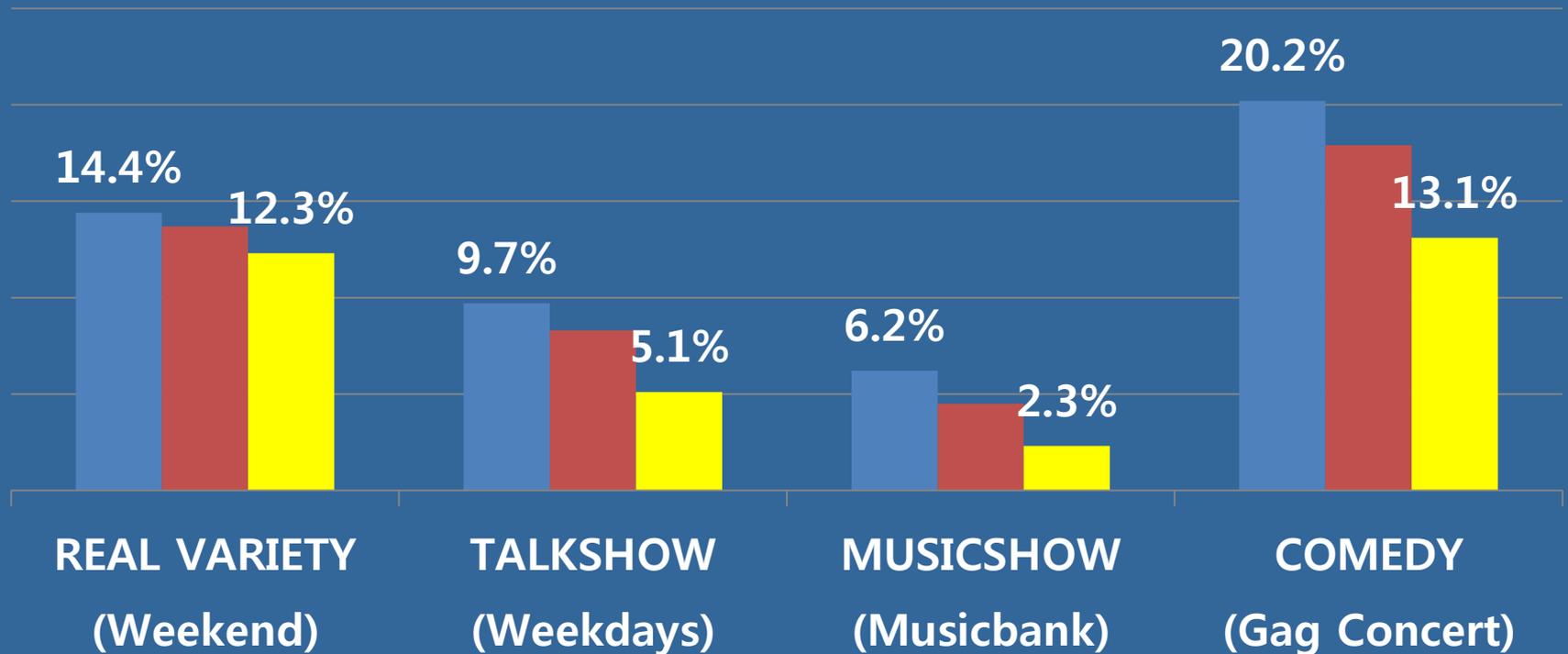
## Drama Genre Average Ratings in Korea



# MEDIA CONSUPTION IS GROWING, BUT EACH TV CONTENT RATINGS IS SHRINKING

## Main Entertainment Genre Average Ratings in Korea

■ 2009 ■ 2012 ■ 2015



And averages do not tell  
the whole story...

# THE FIRST SHIFT IS GENERATIONAL

## TOP 4 Media Mentions Among All Generation, 2015, Korea

■ TV ■ PC ■ SMARTPHONE ■ NEWSPAPER



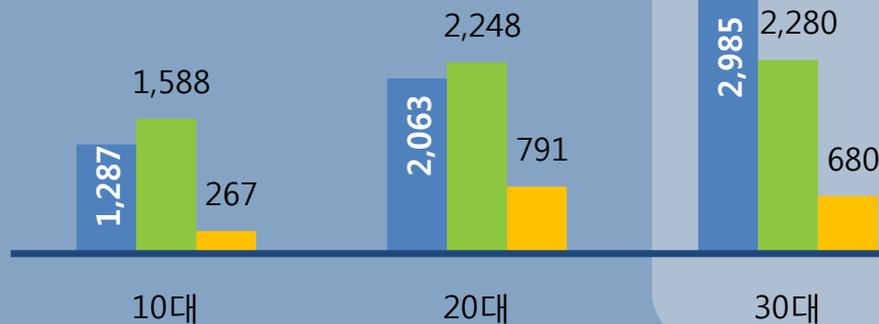
# THE FIRST SHIFT IS GENERATIONAL

As Device usage, younger audience are more watch video by mobile than TV

## Video consumption time by devices

■ TV ■ Mobile ■ PC

### Mobile Video Generations



### TV Centric Video consumption



# THE FIRST SHIFT IS GENERATIONAL

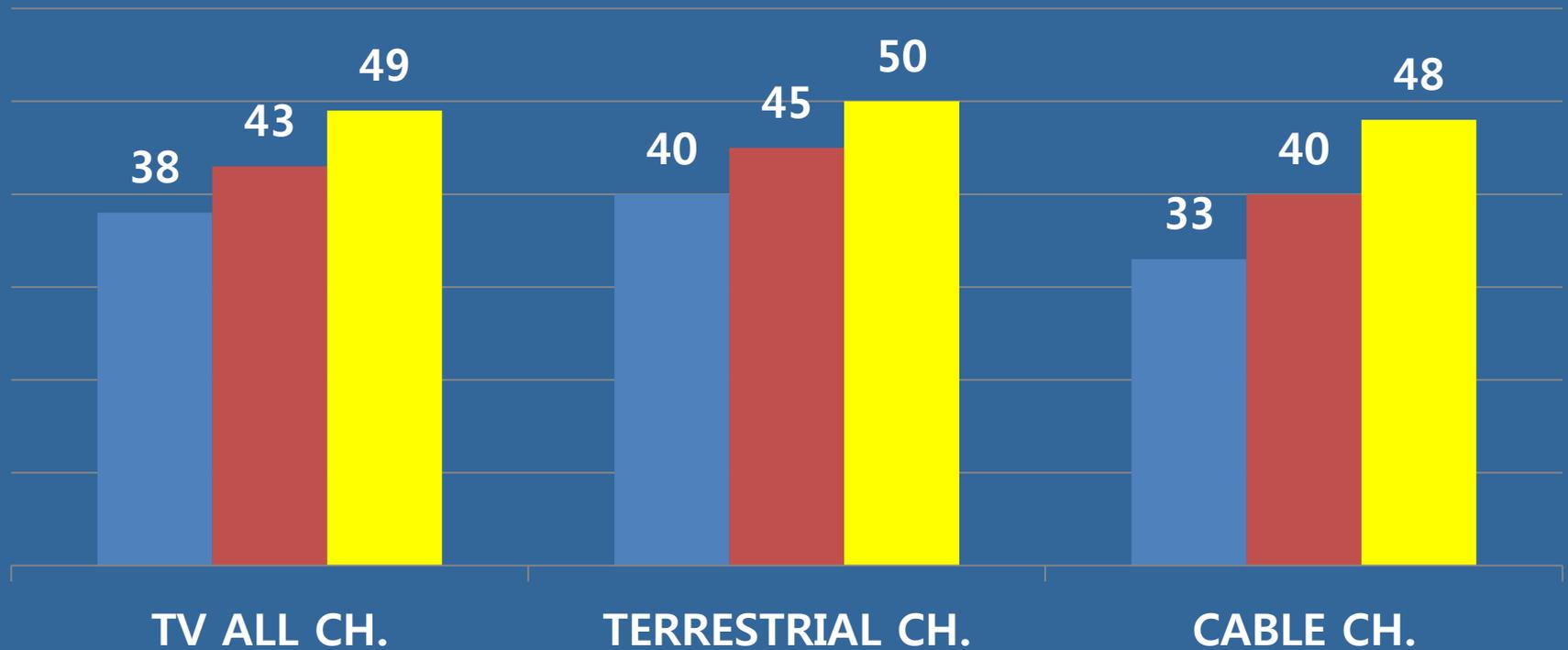
Average minutes of daily TV viewing , all channels, by age, 2005-2015



# THE FIRST SHIFT IS GENERATIONAL

## TV AUDIENCE MEDIAN AGE

■ 2005 ■ 2010 ■ 2015



# THE SECOND SHIFT IS BEYOND PROGRAMMING TIME

## Average minute of viewing per day, total tv, by activity

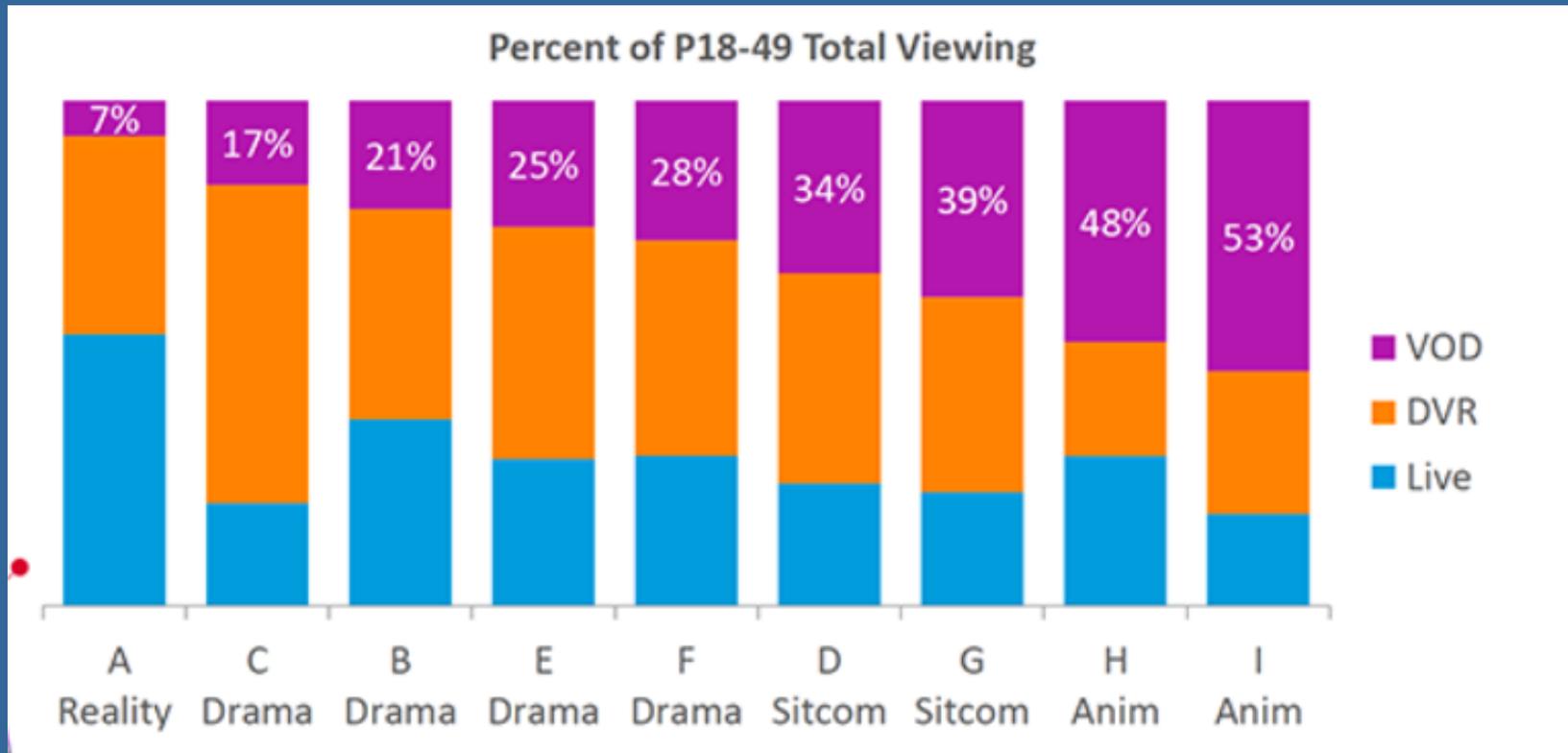
■ Traditional TV viewing(live)    ■ Timeshifted



Source: BARB, UK, INDIVIDUAL 4+,

# THE SECOND SHIFT IS BEYOND PROGRAMMING TIME

## PROPORTION OF VIEWING IN DIFFERENT GENRES



# THE SECOND SHIFT IS BEYOND PROGRAMMING TIME

## VIEWING WAYS OF TV CONTENTS

Proportion watching TV contents in past week(month) (%)

	LIVE VIEWING			VOD VIEWING			DOWNLOAD	
	TV	PC + TABLET	SMART PHONE	TV	PC + TABLET	SMART PHONE	PC/ TABLET	SMART PHONE
TERRESTRIAL TV * (past week)	96.6	6.0	10.1	6.7	3.5	4.8	4.2	5.0
TOTAL TV ** (past month)	96.9	6.0	14.4	27.2	8.4	8.9	x	x

Source \*: KCC(2016), KOREA Base: aged 10+ n=7,085  
Source \*\*: KCC(2015), KOREA Base: aged 13+, n=44,114

## 2. TV Ratings don't represent Real Audience World

# Old Concept about TV Audience Index

<Descendants of the Sun(KBS2)> Programming Schedule (first run)



TV	TIME 22:00	TIME 22:01	TIME 22:02	.....	TIME 23:10
HOUSEHOLD 1	KBS1	KBS1	KBS2	.....	KBS2
HOUSEHOLD 2	0	0	TVN	.....	KBS2
HOUSEHOLD 3	KBS2	KBS2	KBS2	.....	SBS
HOUSEHOLD 4	SBS	SBS	0	.....	0
HOUSEHOLD 5	0	MBC	MBC	.....	KBS2
.....	.....	.....	.....	.....	.....
HOUSEHOLD N	KBS2	KBS2	KBS2	.....	KBS2

Change

Something have gone missing :  
Coverage

Something don't represent audience's changing media  
using pattern :  
Household Rating as Unit of analysis

Something don't be considered :  
Time Shift Viewing

# Needs for Total Audience Ratings

Traditional Service area



TV Channels



KBS **rama** | KBS **joy** | KBS **N**SPORTS

KBS **tv** | KBS **Kids** | KBS **prime**

TV OTT (VOD)

New Service area



Digital Service



# New Concept about TV Audience Index

OLD CONCEPT

		TIME 22:00	.....	TIME 23:10	PAST 0 DAY	PAST 1 DAY	...	PAST 7 DAY
TV	INDIVIDUAL 1	KBS2	.....	KBS2	KBS2 (PAST 1 DAY 22:00~22:20, VOD)			
	.....	.....	.....	.....	.....			
	INDIVIDUAL N	MBC	.....	MBC	KBS2 (PAST 7 DAY 08:00~08:10, CABLE PP)			
PC	INDIVIDUAL 1	0	.....	KBS2	KBS2 (PAST 3DAY, 14:00~14:20, NAVER )			
	.....	.....	.....	.....	.....			
	INDIVIDUAL N	0	.....	TVN	KBS2 (PAST 2DAY, 16:00~16:10 KBS HOMEPAGE )			
MOBILE	INDIVIDUAL 1	0	.....	0	0			
	.....	.....	.....	.....	.....			
	INDIVIDUAL N	SBS	.....	SBS	KBS2 (PAST 4DAY, 23:00~23:10, KVIEW)			

<Descendants of the Sun(KBS2)>  
(first run)

TIME SHIFT VIEWING



WE ARE STILL CONFUSED  
WITH TV AUDIENCE INDEX

# 1Q. What is contents' new definition?

TV LIVE / TV VOD / PC HOMEPAGE  
70 Minute \* 16 Series

PC & MOBILE  
ILLEGAL DISTRIBUTE OR  
DOWNLOAD WITHOUT  
PERMISSION

PC & MOBILE (Naver TV CAST)

- 2~5 MINUTE \* 13~15 CLIP  
(PER Series) \* 16 Series
- TOTAL 665 CLIP  
(CONTACT WITH NAVER)

태양의 후예 - 3회 11 [전체재생](#)



송중기, 송혜교에 "다시 봐서 반가워요"

송혜교, 송중기 주사 바늘 하나로도 '알콩달콩'

진구, 김지원 떠난 이유 '상관의 명령'

김지원 "송중기, 기생 오라비 같아 싫어"

송중기, 송혜교에 "여전히 섹시합니까, 수술실.."

▶ 679,926 ♥ 3,242 | 7달 전

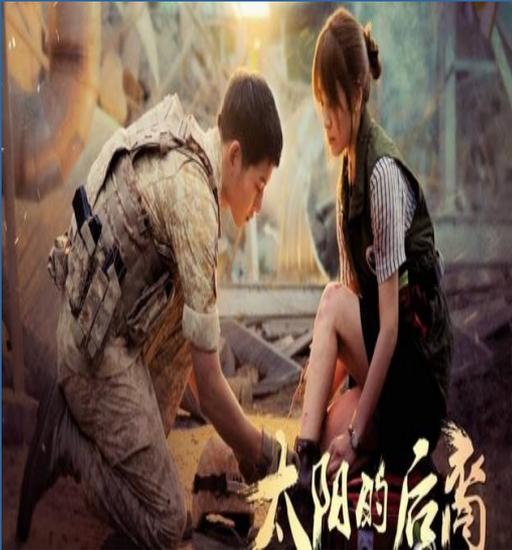
▶ 665,195 ♥ 3,362 | 7달 전

▶ 321,535 ♥ 1,203 | 7달 전

▶ 605,286 ♥ 3,090 | 7달 전

▶ 459,304 ♥ 2,367 | 7달 전

## 2Q. What is the Currency?



### TV

- Household Ratings : 30.1%
- The average audience: 6,906,473
- Reach (1minute+ ) : **31,775,528**

### PC & MOBILE (ex. Naver TV CAST)

- Subscription : 86,077
- Clicks: 125,293,807

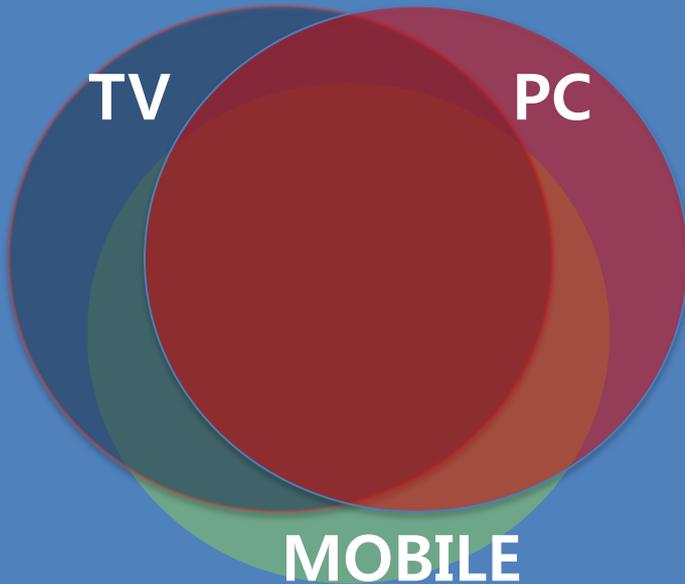
### TV + PC + MOBILE

- TV Currency can't compare with PC & Mobile Currency
- Solution: Time Duration (??)

# 3Q. How should panels be reorganized?

## Single Source Panel Data

- TV & PC & MOBILE 1,800



## Fusion: Combining Data

- TV : 13,000
- PC: 12,000
- MOBILE: 6,000



# 4Q. HOW TO “TOTAL IT UP”?

“Content is moving into so many new places”

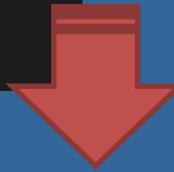
“We want to combine traditional TV viewership with VOD viewership”

“We want to combine TV viewership with pc / mobile viewership”

“We want to have one number that tracks the audience to that content wherever it goes”



TOTAL IT UP



“We have to putting software development kits into our apps and devices and flagging content with tags or watermarks for easy identification and monitoring”

“But we don't want information of our programs and audiences to be opened, and another media company refused to put SDK”

# 5Q. HOW MUCH?

"ANYTIME, ANYWHERE"



"OPPS! MONEY"

# 6Q. WHY “TOTAL IT UP”? :

Different galaxy and same currency?

Linear TV Viewing

Family Viewing

Viewing Habits

Time Shifted Viewing

Space Shifted Viewing

Individual Viewing

Binge Viewing

### 3. Total Audience Measurement Pilot Survey in Korea

Private-Public Council (2014~present)  
(Government, Academic, TV industry, IT industry,  
Advertising industry, Research industry)



KCC

(Korea Communication Commission)



Pilot Survey (2013~present)

- Basic Research (Yearly Media Use Survey)
- N-screen Total Audience Measurement  
Pilot Research (Yearly)

# Total Audience Measurement Pilot Research in Korea: : Method

## 2013 year

<Single Source Panel>

- Panel : National 1,000  
(TV ∩ PC ∩ MOBILE)
- Currency: time  
(tv+pc+mobile)
- time shift viewing: +7
- Method
  - TV: peplemeter
  - PC: S/W (URL matching)
  - Mobile : App.
  - \* Handwork research

## 2014 year

<Single Source Panel>

- Panel : Metropolitan  
1,416  
(TV ∪ PC ∪ MOBILE)
- Currency: time  
(TV+pc+mobile)
- time shift viewing: +7
- Method
  - TV: peplemeter
  - PC: S/W(URL matching)
  - Mobile : App.
  - \* Handwork research

## 2015 year

< Fusion: Combining Data>  
Pilot 1 : TV platform

- Panel : National 8,000  
(TV)
- Currency: time  
(TV)
- time shift viewing: +7
- Scope : 37 ch.  
9473 program

< Fusion: Combining Data>

Pilot 2 : PC & Mobile  
(Unpublished)

Change

Extremely Loud, Incredibly Hollow :  
Unbelievable Results

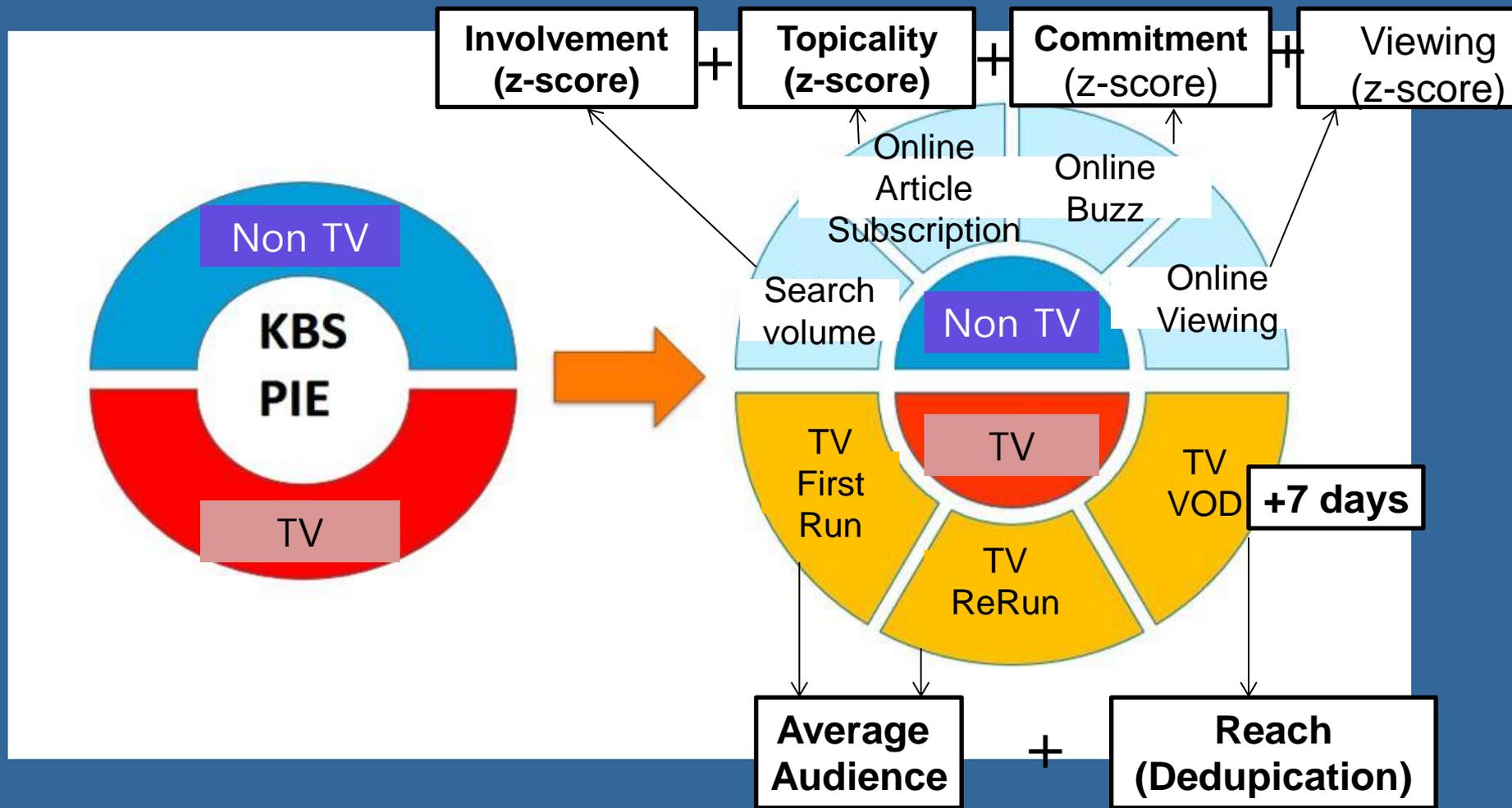
# Total Audience Measurement Pilot Research in Korea : Results

## Average Time Spent Share in a day

		Time Spent Share (%)			TOTAL (H: M)
		TV	mobile	PC	
2013 Year	LIVE	93.6%	0.31%	0.00%	2: 43
	TIME SHIFT VIEWING	6.0%	0.05%	0.03%	0: 10
2014 Year	LIVE	96.42%	0.15%	0.00%	3: 12
	TIME SHIFT VIEWING	2.21%	0.54%	0.67%	0: 07
2015 Year	LIVE	97.90% (2:23)	Unpublished		
	TIME SHIFT VIEWING	2.1% (0:03)			

## 4. Our Idea

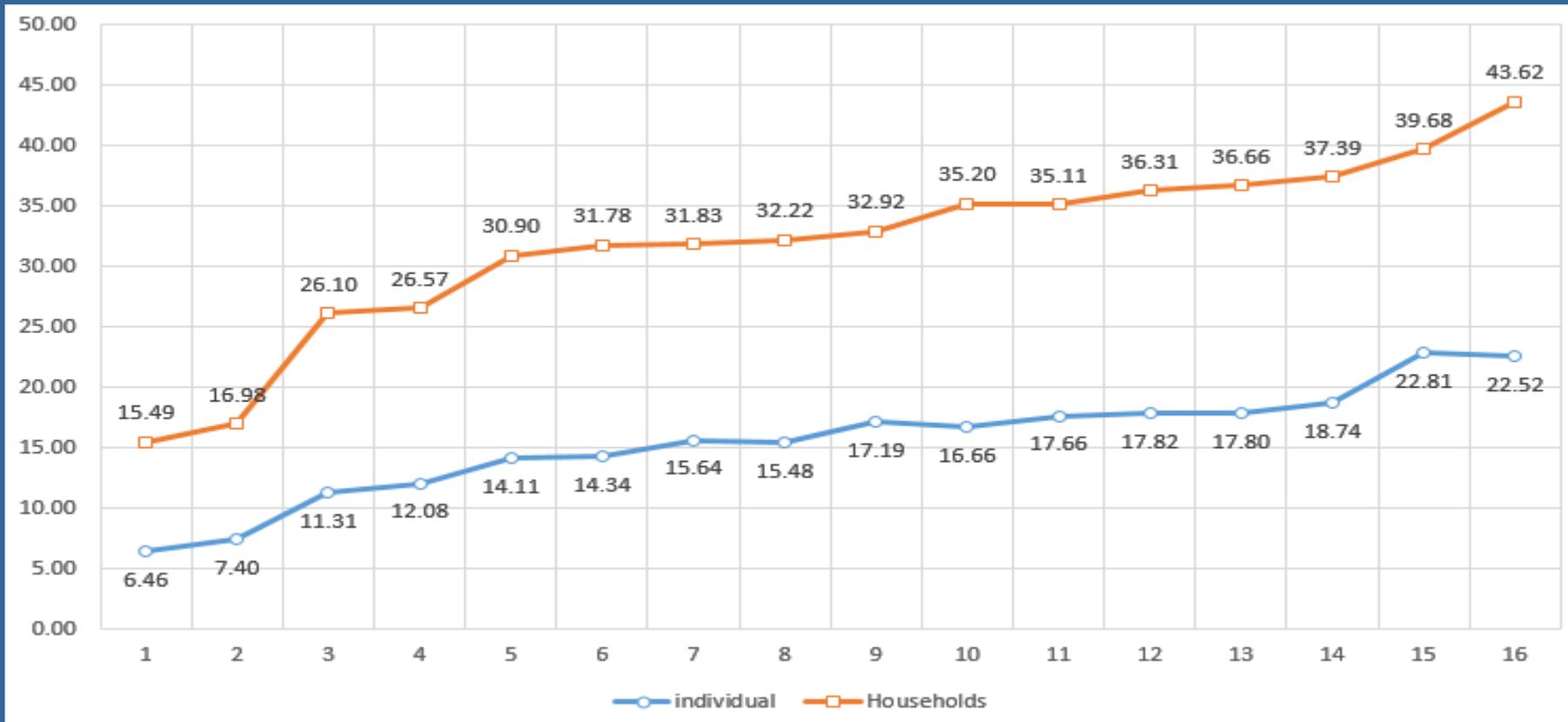
# KBS Audience Measurement Development: Programming Index for Evaluation (developing)



# Case study of "Descendent of SUN"(TV)

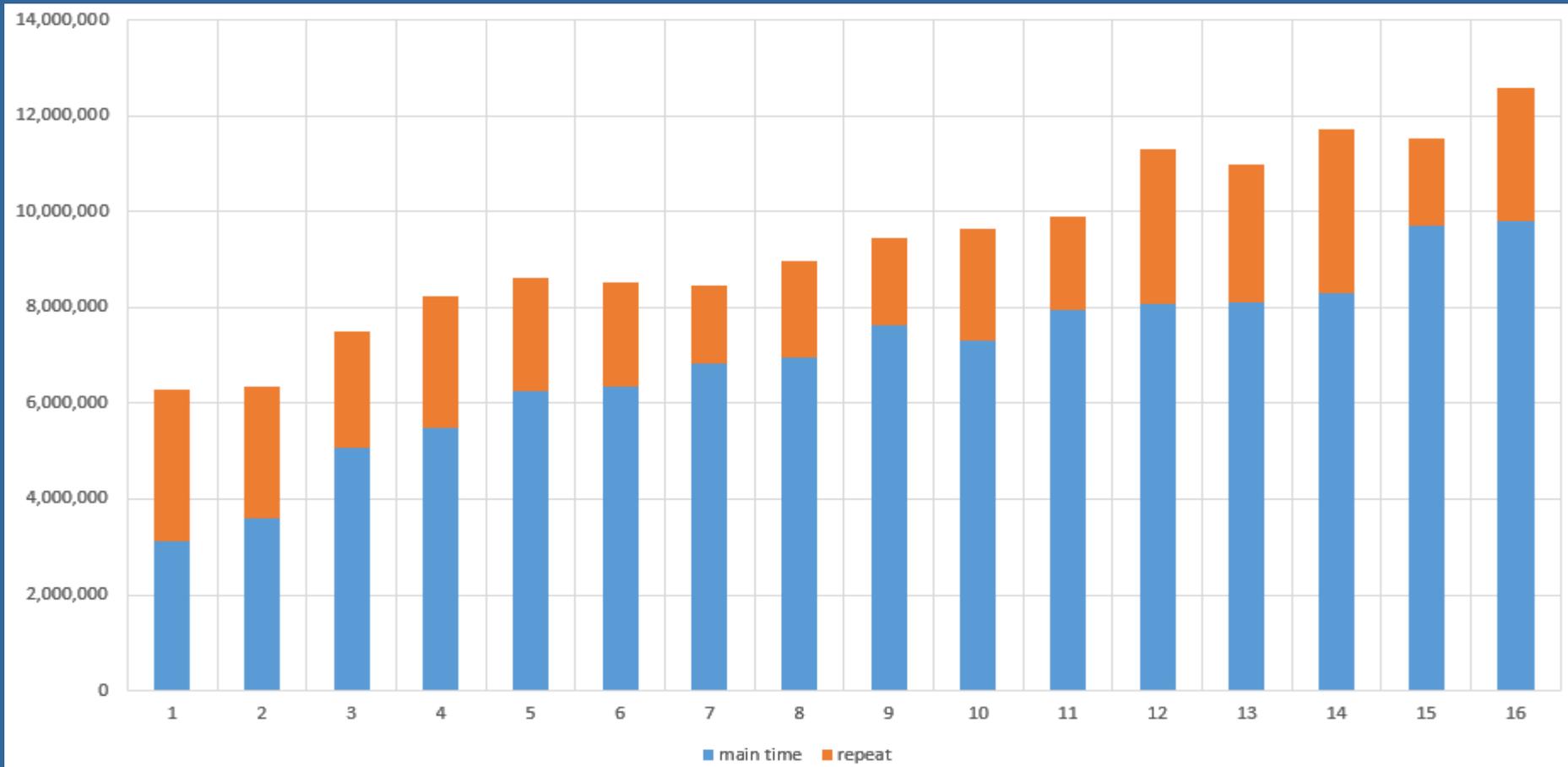


- Wednesday and Thursday Prime time Drama
- 16 episodes, 2016.02.24.~2016.04.14
- TV rating(capital area) : 31.8%(H/H), 15.5%(indi)
- The biggest hit drama in 2016



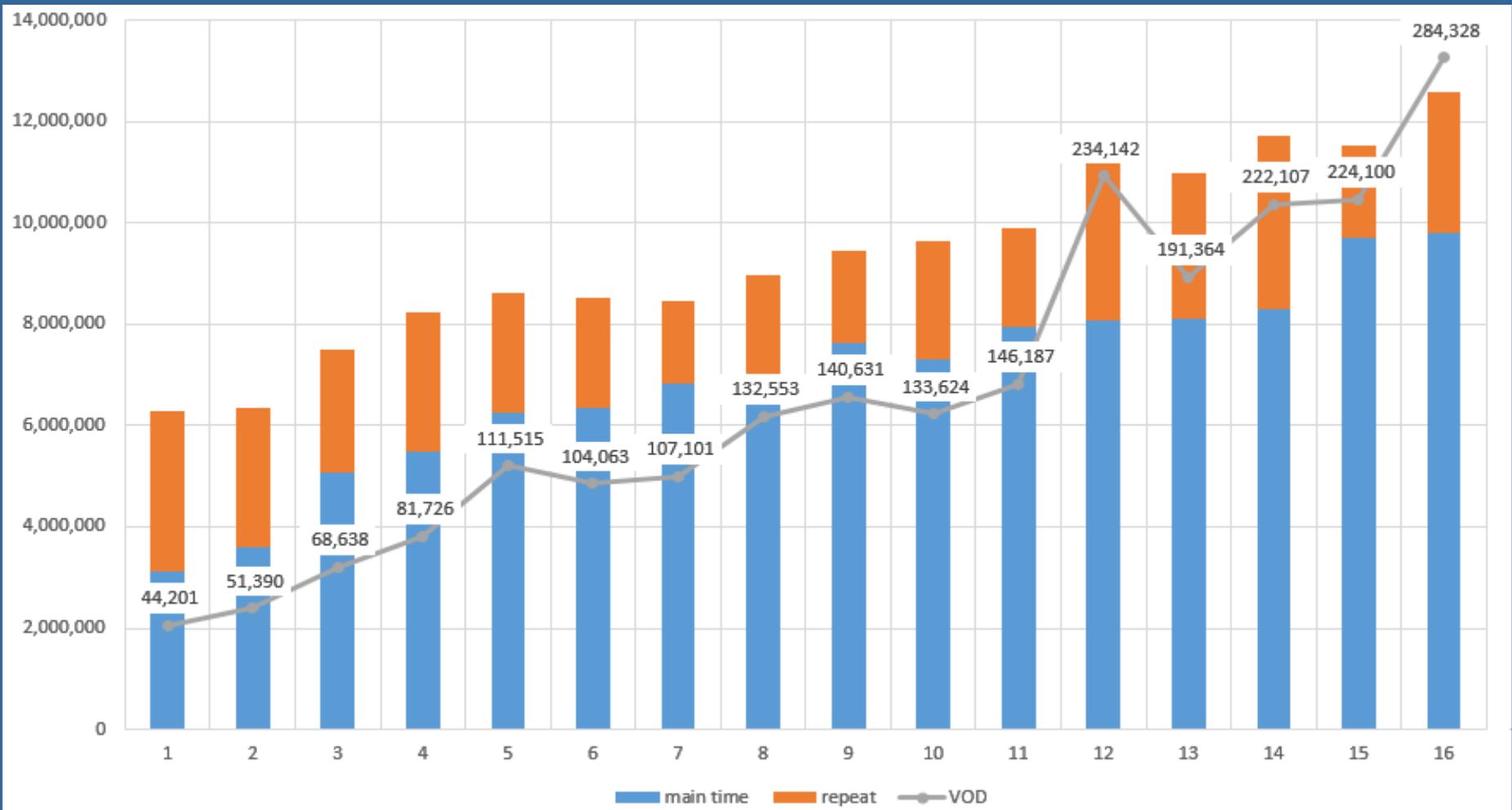
# Case study of “Descendent of SUN”(TV)

- Change of Index from rating to average watch people
- Add up repeat program watch people



# Case study of "Descendent of SUN"(TV)

- Add up VOD average watch people over +7days  
: watch via SVOD(television platform provide)



# Case study of Descendent of SUN : New Audience Measurement (ex.)

TV (16.4.4~16.4.10)

Program	Date	Episode	Channel	First Run		Rerun (+7)		VOD (+7)	TOTAL TV Audience
				Count	Average Audience	Count	Total Rerun Audience	Reach	
Descendent of Sun	2016/4/6	12	KBS2	1	8,099,414	3	1,744,284	630,266	10,473,964

non-TV (16.4.4~16.4.10)

Week	Program	online article subscription	Search Volume	Online Buzz	Online Viewing	Z-score				non-TV Audience Index
						online article subscription	Search Volume	Online Buzz	Online Viewing	
2016/4/4 ~ 2016/4/10	Descendent of Sun	519,009	255,414	25,095	309,213	131.8	128.3	193.4	156.4	609.9

Thank You