

# PRESS RELEASE

London, 3 October 2017



## Autumn 2017

### Innovative content and dynamic strategies in the 4-screen universe

The mid-year review from Eurodata TV Worldwide and Tape Consultancy presented today in London details the first lessons learned from 4-screen TV audience measurement. Watching programmes in this way is becoming complementary to viewing on television and is capable of reaching a wider audience.

Analysis was also presented concerning the increasingly original strategies being used by broadcasters to deal with fierce competition from online platforms: disrupting timelines, use of pop-up channels, etc.

Lastly, a spotlight on the global trends in programming during the 1<sup>st</sup> half of 2017: 6,000 programmes launched, over half of which were original creations, with themes ranging from nostalgia, awaking to today's world, and escapism.

#### 4-screen TV: young viewers continue to rally to the internet

Watched on average for **3 hours and 48 minutes** per day per person in the first half of 2017 in the top 5 countries in Europe (France, Germany, United Kingdom, Spain and Italy), TV unquestionably remains the preferred screen for viewing programmes. However, for a number of years now, internet viewing has enjoyed growing success in TV media consumption.

*"In the major European countries, watching television programmes on internet is becoming general practice, and it can represent a substantial additional audience for certain content, such as targeted fictional content or youth entertainment,"* noted Frédéric Vaulpré, Vice-President of Eurodata TV Worldwide. *"Sport has also confirmed its appeal by continuing to perform extremely well. As king of live TV, it also attracts its own audience of catch-uppers whenever there is a significant time difference,"* he added.

#### **Fiction and Entertainment**

Certain programme genres seem to be watched increasingly in delinearised fashion and via internet. **"Demain nous appartient"** (Tomorrow belongs to us) shown this summer on **TF1** attracted an additional **36%** of viewers thanks to time-shifted, catch-up and online viewing. The same was true for the Dutch series **"Goede tijden, slechte tijden"** (good things, bad things); episodes broadcast between January and August 2017 on **RTL4** increased by almost **20%** the number of viewers watching via TV broadcasts.

# PRESS RELEASE

Autumn 2017

Innovative content and dynamic strategies in the 4-screen universe



## **Computers are No. 2 and young people are using their smartphones**

Computers are the leading screens just after televisions. In France, they represent **52%** of online programming TV consumption.

However, smartphones are one step ahead of computers for youth-oriented channels (such as **W9** in France), and tablets rank first for children's channels (**Gulli** in France).

## **Tablet in the morning, smartphone in the evening**

Which device is being watched and when? In France, tablets have become No.1 for watching TV online between 6am and 7am. In the evening mobile telephone use increases.

4-screen television audience measurement is expanding and has recently been introduced in four countries (France, the Netherlands, Sweden and Denmark). These pioneers are due to be joined in 2018 by some 15 other countries, such as Japan, Norway, the United States, the United Kingdom, Germany, Singapore, the Czech Republic, Italy and Malaysia.

## **Innovative strategies for traditional channels and new players**

In an environment where new usages are becoming increasingly significant, broadcasters of TV content on the web, and pure players in particular, are becoming serious competitors for the pay-TV channels. Some pure players now offer packages of channels in their SVOD offering. For example, in the United Kingdom, Austria and Germany, this is true of players such as **Amazon Prime Instant Video** (already present in the USA), and also **PlayStation Vue** in the United States, who are riding high on their successful reputations to attract online viewers. At the same time, traditional content broadcasters such as **HBO** or **Canal+** are refining their business models and are offering increasingly competitive deals for their online packages. These allow viewers to combine their choice of online content and create their own TV line up at a lower cost.

In addition to these new business models, channels have developed innovative digital strategies to highlight their programmes. They can break with the traditional broadcasting timeline, for example by debuting the programme season with an online or SVOD broadcast. They have also launched 'pop-up' channels whose lifespan depends on the events to which they are dedicated. There are also some new storytelling formats, such as **NBC Left Field**, the US platform of short documentaries relayed on Facebook, Instagram and YouTube which is bringing video journalism into the digital strategy of traditional broadcasters.

# PRESS RELEASE

Autumn 2017

Innovative content and dynamic strategies in the 4-screen universe



## The latest programme trends: nostalgia, awaking to today's world and escapism

With nearly **6,000** new recurring programmes launched since the beginning of the year, of which **52%** were original creations, the television industry and OTT platforms have increasingly demonstrated how dynamic they are.

*"To date the OTT platforms have primarily concentrated on scripted and documentary content in terms of their original output...that is now changing and the unscripted world in general is fast becoming an area of interest. This could well present yet another key turning point in the content business, as the online players begin to deliver a breadth of content comparable to the linear outlets"* according to Paul Youngbluth, Director at Tape Consultancy.

Whether in fiction, factual or entertainment genres, the new programmes largely fall into three broad trends:

- remembering the past and moving forward
- awaking to today's world
- escapism (in every sense of the word)

Several fictions are thus set in the 30-year post-war boom, a prosperous era that is often perceived with nostalgia. In **"House of Bond"** (Australia), for example, we follow the life of a rich businessman from the 1960s to the modern day. Factual programmes are also looking to the past: **"The Keepers"** (Netflix) tells the story of an unsolved murder case from 1969, whilst the documentary **"GW's Murders"** reviews the most famous cases encountered by a Swedish criminologist. Finally, we are seeing entertainment formats from the past return in force, with a modern twist: for instance, game shows **"Sarabanda"** in Italy and **"De 3 Wijzen"** in Belgium are back on screen after more than a decade.

New TV programmes launched during the first half of 2017 have also given prominence to the present and the future. *"Creators are drawing inspiration from an ever-changing world that faces unheard of political and military problems, technological upheaval and scientific advances; it opens up new perspectives to us as individuals and collectively,"* explained Florent Carême, Head of Research at Eurodata TV Worldwide. Some of the programmes confirming this trend are fictions like **"Börü"** in Turkey and **"Al Hala Geem"** in Egypt dealing with political events that have marked the recent history of those two nations. The factual genre is looking to the future with documentaries such as: **"In Search of Artificial Intelligence"** (China) and **"Meine Letzte Chance"** (Austria) and new consumer trends and ways of interacting, can be seen through entertainment formats such as **"Hyori's B&B"** (South Korea).

Television has always been a great way to distance ourselves from daily life and to discover other cultures. This year, original creations offer escape from routine, through travel or by unveiling the lives of celebrities and eccentric individuals. For example, **"Deception"** (United States) is a drama centred around an illusionist who uses his talents to help the police, and **"Break Out"** (Netherlands) is an escape game featuring famous contestants. Lastly, the documentary **"Vores ukentde Danmark"** blends travel and celebrities to give its viewers the ultimate escapist experience.

# PRESS RELEASE

Autumn 2017

Innovative content and dynamic strategies in the 4-screen universe



## About Eurodata TV Worldwide

*Eurodata TV and TAPE Consultancy are providing Worldwide Content and Audience Insights for global media professionals in the television and film industries.*

*Created by Médiamétrie, Eurodata TV Worldwide is the specialist of international TV markets and unique provider of official TV ratings of 7000+ channels in more than 110 territories and insight analyses based on a global expertise. Eurodata TV Worldwide tracks and monitors the latest TV and online contents in 50 territories.*

[www.eurodatatv.com](http://www.eurodatatv.com)

Twitter: @EurodataTV

[www.facebook.com/EurodataTV](http://www.facebook.com/EurodataTV)

## About Médiamétrie

*The French industry leader in media research, Médiamétrie observes, measures and analyses audience behaviour and market trends. Created in 1985, Médiamétrie is operating in television, radio, Internet, cinema, mobile devices, and the cross-media sector. Médiamétrie generated a turnover of €88.5 million in 2016.*

[www.mediametrie.fr](http://www.mediametrie.fr)

Twitter: @Mediametrie

[www.facebook.com/Mediametrie](http://www.facebook.com/Mediametrie)

### Press contacts:

*Laure Osmanian Molinero*

Tel: +44 (0)7827 716 216

[laureosmanianmolinero@outlook.com](mailto:laureosmanianmolinero@outlook.com)

*Isabelle Lellouche Filliau*

Tel.: +33 (0)147 589 726

[llellouche-filliau@mediametrie.fr](mailto:llellouche-filliau@mediametrie.fr)