# Summary

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Our clients and partners report on their successes, projects and relationship with Eurodata TV Worldwide.

- **Nielsen** – Megan Clarken – *Executive Vice President of Global Watch Product Leadership* – USA
- **Sportel** – Amparo Di Fede – *General Manager* – Asia

## [What’s new?]
- **OTVY 2016: the report that faces the New Challenges of TV**
  TV consumption has expanded and has gone beyond the simple understanding. In 2015, there were nearly 20 countries that included on its TV measurement: time-shifted viewing and catch-up TV, while around 10 countries measured only time-shifted viewing. These numbers have multiplied by 3 since 2010, and are likely to follow the same pattern in 2016.

### The Brazilian wave reaches all the continents
The Brazilian TV landscape’s competitive environment is composed of three major private free-to-air (FTA) networks which hold more than half of the market, but also Pay TV channels that have increased their market share year after year. Brazil is the first country in Latin America in terms of programs launched in 2015 with more than 100 new TV shows launched. Brazilian FTA TV channels mostly bet on local creations, whether they are original creations or adaptations. Fiction stands out as the genre which is exported the most by Brazil.

## [New on the air]
- **X-Files** – The revival of the cult series has achieved excellent results. Its premiere has increased FOX’s prime time average by 420% in 18-49, and it has already been sold in 9 countries.

- **Felix Og Vagabonden** – Based on a true story and produced by STV Productions (“The day the immigrants left”), the docu soap gathered - on the 1st episode - a share of 125% above the channel's slot average.

- **Er Tai Shi Dai (二胎时代)** – This reality show has created a buzz in the media and achieved high results among young audiences (+77% vs. the slot average).

## [Join the team]
- Latest job and internship offers
Multiscreen Consumption: towards a reference measurement

Evolutions measurements and changes in viewer’s habit are two key subjects that haven been discussed over the time and have been pointed out as a trend. Nevertheless, this can hardly be called a trend when all the players in the industry have changed strategies and have developed their content formats to adapt them to the new ecosystem. Aware of this – no longer trend in the industry – Mediametrie, Nielsen, SKO, among other Institutes of Measurement have launched themselves to the creation of a Measurement of reference that can include the multiscreen consumption.

Along with these initiatives, Eurodata TV Worlwide is also playing an active role toward our client by releasing on April 2016 the One TV Year Report. This Report will be available online and on paper version. Through an interactive and responsive platform the user will be available to do comparisons among key territories, countries and facts.

The OTVY 2016 Report will include for the first time the difference between Live and Time-shifted viewing consumption, where data is available and will compile an analysis on TV consumption among three different targets. The One TV Year Report Online will be available in all devices on March 2016 with an overview of more than 100 territories.

Would you be interested on having an online access? (Drops us an e-mail)

Participating in a panel discussion at Discop Istanbul with major players of the industry – Armoza Formats, Global Agency, ATV, CEE TV and RTV - we have presented the last trends of TV content & online video consumption. You will find an abstract of it in the Exclusive Section!

To stay up to date with the latest content trends, make sure to not miss out on Eurodata TV's conference at the MIPTV on April. During the opening conference, held on Monday morning at 9h15, we will give in exclusivity the results of our Yearly TV Report in the World and pinpoint the most recent content and programs to look at during Miptv. Likewise, we will disclose key facts about innovative trends and audience successes of formats at the MIPFormats!

Do you want to know more about TV trends in specific territories?

Scroll down for Brazil and CEE countries!

Frédéric Vaulpré
Vice President, Eurodata TV Worldwide

Find out more about our insight reports:

- **NOTA International TV Trends**: fresh formats and the latest international trends
- **The Kids’ TV Report**: trends and hits in children’s programming
- **The Scripted Series Report**: a whole season of scripted formats
- **The Entertainment Report**: hot properties and business strategies
- **Key Producers Insight Report**: identifying the weight of producers
- **Multiscreen Report**: comprehensive overview of multiscreen content and strategies
- **Yearly Sport Key Facts Report**: offerings and viewing of international sport programming
- **One TV Year in the World**: the ultimate yearbook for international TV executives
- **The Young Adults Report**: an insight about the overall young adult’s TV consumption trends
Key figures of TV creation for CEE countries

Eurodata TV Worldwide team is constantly travelling around the world to meet our clients/partners and bring a unique insight through conferences, seminars and festivals around five continents. In the coming months you can meet and hear us at:

- **MasterClass Fiction - The Media Faculty**
  Paris, The new French fiction
  23-24 march 2016
  Sahar Baghery - sbaghery@eurodatatv.com

- **MIPTV**
  Cannes
  4-7 april 2016
  Sahar Baghery - sbaghery@eurodatatv.com
  Frédéric Vaulpré - fvaulpre@eurodatatv.com

>> See our 3 conferences

Wherever you are in the world, we look forward to seeing you soon!
Nielsen
Megan Clarken – Executive Vice President of Global Watch Product Leadership
– USA

4-screen audience measurement in the USA

In this period when measuring video audience on any device (TV set, PC, tablet, smartphone) is so crucial in many countries, could you please explain what Nielsen US "Total Audience" project consist in and what are its main characteristics?

Nielsen Total Audience delivers truly independent, cross-platform measurement, and I'm delighted to say we've made tremendous progress delivering it to the market. Nielsen Total Audience is about 4 things.

Firstly – it's the measurement of consumers’ exposure to media across platforms. By cross platform, we mean, across devices and access points (TV, PC, Tablet, Smartphone, via Connected Device, Web Browser, In App etc) – also across ad models (Linear ad model, Digital dynamic ad model or no ad model) and beyond 7 days.

Secondly – Nielsen’s Total Audience measurement is the CONSISTANT measurement across platform. Meaning – digital video consumed on digital devices today is measured using a different calculation method to the way in which traditional TV is measured. Nielsen’s Total Audience measures everything the same way – therefore providing apples to apples calculations of Audiences to both Traditional and Digital Video.

Thirdly – it’s about the measurement of ads as distinct and separate to the measurement of content. The reason why this is important is that we believe that over time there will be less and less of a relationship between the two because of targeting and addressability. We measure Total Content for Planning, Placement and Pricing, and we measure Total Ads for post-buy analysis and reconciliation against guarantees.

Lastly – Nielsen’s Total Audience is about shifting from Ratings that have traditionally been the domain of the traditional industry and media owners, to a more inclusion service that anyone can participate. We’re focused now around Video, Audio and Text. What this means is that now, both traditional and digital first media properties who are selling ad space or licensing their video content, can use the same "language" to compete. This result in reducing confusion for the advertisers and ultimately driving more spend into media in general. Nielsen Total Audience solves a clear industry need.

What were the main milestones of this project until now and what are the next steps?

We’ve laid out our complete go to market roadmap into 4 steps. Firstly – our Execute step. This is about building the underlying capability, building the architecture, the products and the features that make up the Nielsen Total Audience framework. As of the close of December 2015, all of the pieces were complete. The system and its components and products are finished and in production.

The second step in the plan is the Evaluate step – this involves the implementation of software by Media Owners onto their Content in the form of SDK’s (Software Development Kits). This process started in January of 2015 and will continue for as long as we have new clients and new content to measure. Today, we have implemented the measurement software onto the video players of over 20 of the largest Media Owners with a growing pipeline that we’re working through. This process also involves the certification of the software and the data that it’s producing for both Android and iOS apps – and it involves working closely with the media owner to make sure that the data looks right and to solve any issues that may arise.

While the Evaluate step continues, we move to the Adopt step. This step is crucial – it’s the step where we start seeing the industry refer to the Total Audience numbers in their buying
and selling negotiations. **It’s the beginnings of the market moving beyond the restrictions of the C3/7 currency** and it’s exclusions and limitations – and opening up more possibilities to trade on broader Audience possibilities. This then will lead to the final stage which we call **Transact** and with this stage, we see the evolution of the trading currency to be more inclusive of media consumption that represents today’s viewing behavior. We still have work to do with the industry to evoke this change, but we’re well on our way.

**In your view, what are already the first main findings of this "Total Audience" road to a full 4-screen audience measurement?**

It’s early days in the introduction of the Nielsen Total Audience framework to the US industry, but the signs are all there that this strategy is an important one. It’s important because it will continue to provide a stable currency trading platform in an ever-changing and complicated environment.

**We’ve learnt that the architecture and methodology is scalable and resilient to change in the ecosystem,** we’ve learnt that audience measurement today is a team sport – no longer can measurement agencies rely purely on passive measurement systems – hence the SDK integration.

**We’ve learnt that media owners need flexible measurement as they move rapidly and constantly between business models – linear, dynamic and subscription.** We’ve learnt that representative panels are still the only mechanism for calibrating big data to be representative of a population. And as far as the data, we’ve seen increases of between 5% and 20% in audience numbers just by adding audiences viewing beyond 7 days - out to 35 days, by adding the audiences to the VOD content, by adding audiences to the program regardless of the ad load, by adding audiences who are cutting the cord and accessing content only via IP connection – by effectively adding it all up. **That’s the promise of Nielsen’s Total Audience.**
Can you tell us more about SPORTEL's latest successes?

It is safe to say that SPORTEL since its founding has grown to be the must attend convention for the elite of the industry.

What started as a conference, changed to the leading exhibition style content market and 27 years on, into the full on business platform for the international Sports Marketing & Media Industry.

We are extremely honored by the following and the importance the industry leaders give SPORTEL today. Just a few years ago we added a new venue to the exhibition in Monaco and we are excited to announce that again SPORTEL has outgrown its space and for SPORTELMonaco 2016 even more professionals and new exhibitors will be welcomed in another new venue! SPORTELMonaco 2016 will look nothing SPORTEL did before. We expect great things for us and the growing SPORTEL community.

What are your main projects and strategy outlines over the coming months?

With two conventions per year, there is no time to rest and the industry demands new opportunities at every convention.

So, facing SPORTELAsia 2016 which happens this month from the 15th to the 17th in the Shangri-la hotel in Singapore, our staff has been working hard to have this convention ready in time.

Also with the new developments for SPORTELMonaco 2016 business is definitively not as usual! Apart of designing the new venue, we're working tirelessly on marketing the new convention, the new opportunities and spaces offered for the future of our industry.

How does information and insights provided by Eurodata TV Worldwide help sports stakeholders strengthen their strategic position / activities?

That is easy to answer: without insight no professional can do good business! We rely on the insight provided by Eurodata TV Worldwide and in fact we know that the SPORTEL community also appreciates the advantages they have with the information you provide.
OTVY 2016: the report that faces the New Challenges of TV Consumption worldwide

TV consumption has expanded and has gone beyond the simple understanding. The increase of time-shifted consuming viewing and catch-up TV, along with multiscreen consumption, add a degree of complexity to grasp viewer’s behavior. The sole classic live TV set audience measurement is not enough to fully understand TV consumption. The International TV market needs to have a clear vision of how behavior is measured and which territories are being measured. In other words, the market needs to know exactly which kind of data is available.

In 2015, there were nearly 20 countries that included on its TV measurement: time-shifted viewing and catch-up TV, while around 10 countries measured only time-shifted viewing. These numbers have multiplied by 3 since 2010, and are likely to follow the same pattern in 2016. Evolutions in TV measurement are not there stopping; the long-awaited - and technically challenging - fully unified 4-screen-measurement is planned to be released in 6 countries in 2016/2017 (France, Germany, the Netherlands, Sweden, the United Kingdom and the United States)!

Therefore, and following TV measurement evolutions - for its 22nd edition - the One Television Year report continues to innovate and expand its landscape with the goal of providing a complete and handy access to data from over a hundred territories all around the globe. This new edition will include for the first time data from India, Hong Kong and Cameroon. It contains new global information regarding non-linear TV consumption, and it will also be a true companion as it is going to be released as a brand-new online interactive platform!

The decrease of 2% of the worldwide average daily viewing time between 2012 and 2014 was mainly due to the decrease in the regions Asia Pacific, Africa, and Middle East, which decreases in average viewing time were mainly due to countries Mongolia, Egypt, and Jordan respectively. Such comparisons and analysis will be easily available with the OTVY platform in which the user will have the ability to make a personalized selection of countries, and obtain key information such as the average daily viewing time, the genre best represented in the top 10 programs, among others.

Aware that non-linear consumption is necessary to have a full vision of viewer’s behavior, the OTVY report will present the average daily viewing time for all individuals, as well as, young adults with live and consolidated information for each country where available. A thorough-out analysis will highlight the trends of time viewing evolution for the main global geographical areas in the world; likewise, the trends for children, young adults and all individuals.
Paper and **online versions of the One Television Year in the World report will be release in early April 2016.**

**Source:** EurodataTV Worldwide

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The Brazilian wave reaches all the continents

The Brazilian TV landscape’s competitive environment is composed of three major private free-to-air (FTA) networks which hold more than half of the market, but also Pay TV channels that have increased their market share year after year. Moreover, the number of OTT platforms rises quickly in the largest Latin American country.

Love stories, biopics and cooking shows

Brazil is the first country in Latin America in terms of programs launched in 2015 with more than 100 new TV shows. Brazilian FTA TV channels mostly bet on local creations, whether they are original creations or adaptations.

Fiction is the key genre as it represents more than half of the new launches. Channels broadcasted almost as many local creations as imported content. Almost all imports come from the United States; however some come from other countries, such as the Turkish series 1001 Nights and the Mexican telenovela Soy Tu Dueña. Local fiction mainly focuses on love stories, even twisted ones such as the recent Globo series Ligações Perigosas.

Factual-wise, FTA channels rely a lot on new magazines to refresh their programming grids. From politics to sport to food, programs are very eclectic in their subjects. For instance, the channel Bandeirantes launched the latenight magazine Alta Conexão which focuses on culture, while Gazeta’s Vida de Atleta shows athletes’ routine.

Even if entertainment shows represent less than 10% of the new launches, they are not left behind. Brazilian TV channels broadcasted original creations as well as adaptations of hit formats such as Junior MasterChef and The Great Bake Off. Local creations were mostly variety shows such as the Sabadão com Celso Portiolli.

Fiction at the core of the Brazilian wave

Taking a look at the new launches over the 2015 year in the world, fiction stands out as the genre that is exported the most by Brazil. Indeed, almost all Brazilian programs launched
abroad were fictions. Telenovelas occupy a large majority of exports, such as Globo’s fiction
Amor A Vida broadcasted in Argentina, Poland and Romania.

Brazilian programs mostly spread in Latin America and Portugal. For instance, Venezuelan,
Chilean and Mexican channels broadcasted A Vida Da Gente, while the Portuguese channel
SIC released the Telenovela A Regra Do Jogo. Outside these areas, Brazilian formats have
also started to appeal in further territories. In particular, in Eastern Europe, the Russian
channel Yu TV, the Romanian Acasă TV and the Polish TVN broadcasted several Brazilian
fictions such as Por Amor and Lacos de Familia in Russia, which achieved great results for
their respective premieres. Even Africa has started to become interested in Brazilian content:
in Ivory Coast the Telenovelas Paginas Da Vida and Avenida Brasil were launched on Nina
TV last summer.

Source: Eurodata TV / NOTA

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**X-Files** – The revival of the cult series has **achieved excellent results**. Its premiere has **increased FOX’s prime time average by 420% in 18-49**, and it has already been sold in 9 countries.

Thirteen years after the original TV show, viewers discover the next chapter of "The X-Files" with David Duchovny and Gillian Anderson re-inhabiting their roles as iconic FBI Agents.

**USA – FOX / Series** – The original pair of FBI agents continues their investigation about the strange and unexplained.

**Felix Og Vagabonden** – Produced by STV Productions ("The day the immigrants left"), the docu soap **gathered great results in the commercial targets on the 1st episode with a share of 125% above the channel’s slot average**.

The program follows Henning a man who –five years ago – lost his job and house. He travels around Denmark on a bike with his dog Felix. Through his journey, he talks about Society, living in Denmark and how people helped him.

**Denmark – DR2 / Docu Soap** – This program is a docu soap about the pastry chef Henning, who lost his job and thereby his home five years ago, and therefore started travelling around Denmark on a bike with his dog Felix.

**Er Tai Shi Dai (二胎时代)** – with new Chinese legislation allowing couples to have two children, this reality show has created **a buzz in the media and boosted the audience by 77% among young audiences**.

This reality show selects four ordinary children living as “the second child” with four celebrity families, which generates funny moments as well as family conflicts.

**China – BTV 1 Sat / Reality** - This reality chooses with an on-ground audition to select four ordinary children who live with four celebrities’ families, in attempt to observe the new educational insight in the age of two children.

**Source:** Eurodata TV Worldwide / NOTA / Relevants partners
Eurodata TV Worldwide department analyses and gives access to audience performances of television programmes in more than 100 territories across the world. Our clients are TV producers, TV Channels, Copyright Organizations, Sponsors, etc.

You have a strong interest in international television? You already keep an eye on new launches and programming trends?

Join our team!

Our Research department is currently seeking with a Part-Time - Home Working contract a:

**TV ANALYST in Indonesia / Malaysia / Morocco / Thailand**

Created by Eurodata TV Worldwide, NOTA is a tracking and monitoring service of new TV programs. The NOTA website provides detailed information on every single show, its content, cast, origin, producers, distributor, programming environment and ratings.

**Job title:** NOTA TV analyst
Part time (1-2 hours per day)
Home working

**Tasks:**

- **Daily identification** of new entertainment, factual and fiction television programs on the main Indonesian TV channels
- **Writing standardized reports** with a description of the programs and production credits
- **Recording and sending videos** of the identified television programs to the NOTA team in Paris

**Profile:**

- Strong interest in television and media business
- Excellent writing skills in English
- Organized, reliable
- Internet connection, access to Indonesian TV channels (or possibility to subscribe)

**Contact:** please send your application to the NOTA team: e-nota@eurodatatv.com