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Redefining Audience Measurement in the Multi-Device Period

The Case of NHK, Japan

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NHK Broadcasting Culture Research Institute

- Established in 1946 as a broadcaster-operating institute for comprehensive research on broadcasting affairs.
- Covering broadcasting program studies, world trends in broadcasting, surveys of audience attitudes
- Main surveys about audiences :
 - Nationwide Survey on Individual Audience Ratings
 - Nationwide Diary-Method Survey on Reach
 - Surveys on viewer attitudes and trends
 - Time Use Survey of Japanese
- NHK Broadcasting Culture Research Institute
<http://www.nhk.or.jp/bunken/>

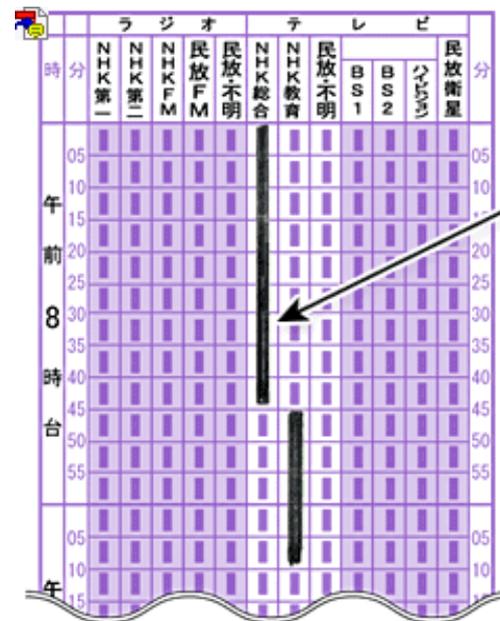


I . NHK's Audience Measurement

Individual Audience Ratings Survey

Started since 1954 (present self-recording method --- since 1974)

- Nationwide survey (every June and November)
- Target: 3,600 Japanese aged 7 and above
 - Stratified two-stage random sampling from the Basic Resident Register
 - Valid rating --- 66.1% (2016).
- Record TV and radio viewing time and channel at 5 minutes intervals in a day during one week
- Including viewing time through PC or smartphone.
- Not including viewing time of recorded programs.



このように、鉛筆で見聞きした局と時間にあわせて線を引いてもらう

TV Ratings in Japan

○ Video Research

- ⇒ Metropolitan area and 27 cities
- Household rating
- Electronic metering set
- Tokyo Terrestrial television only

○ NHK

- ⇒ Individual rating
- Self-recording "diaries"
- Nationwide
- Terrestrial television, satellite television and radio

TV Ratings in Japan

Advantages

Disadvantages

○ Video Research

- Daily ratings
- Ratings by the minute

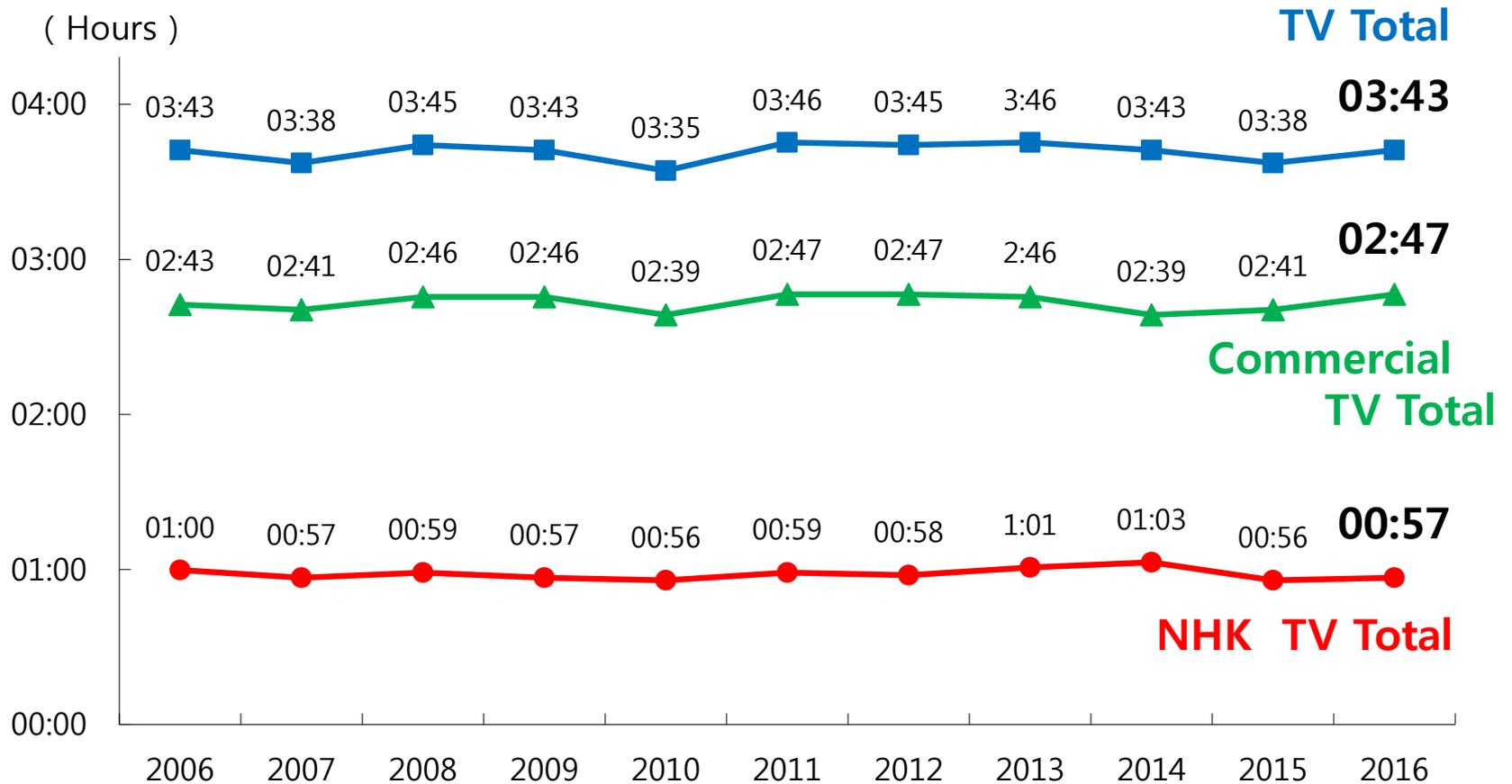
- Not covering nationwide
- Unknown if people really watched

○ NHK

- Covering nationwide
- Statistically analyzable

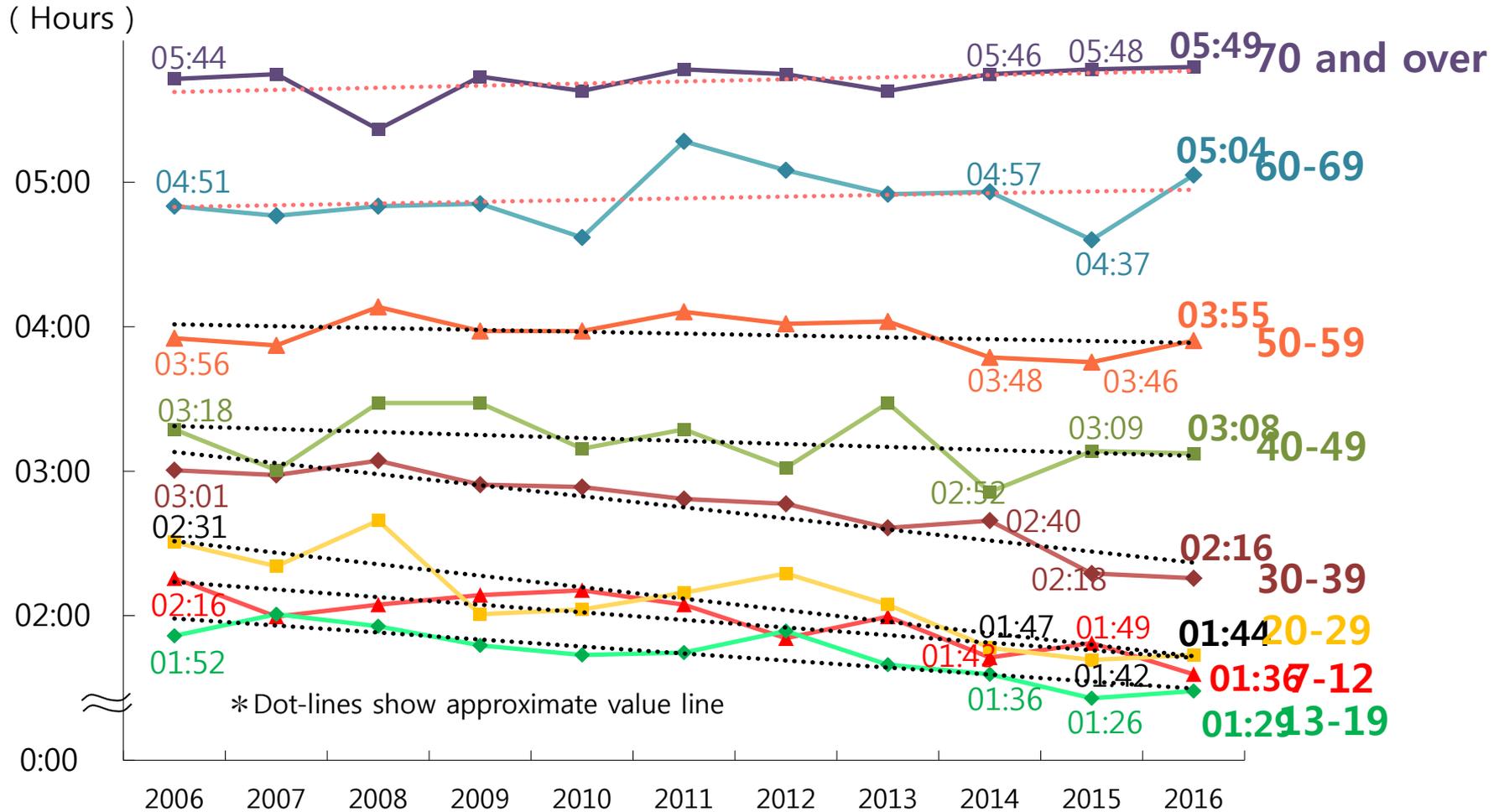
- Only 2 weeks data in a year

TV viewing time (2006-2016 ; weekly average)



NHK Nationwide Survey on Individual Audience Ratings
(the June 2016 Survey)

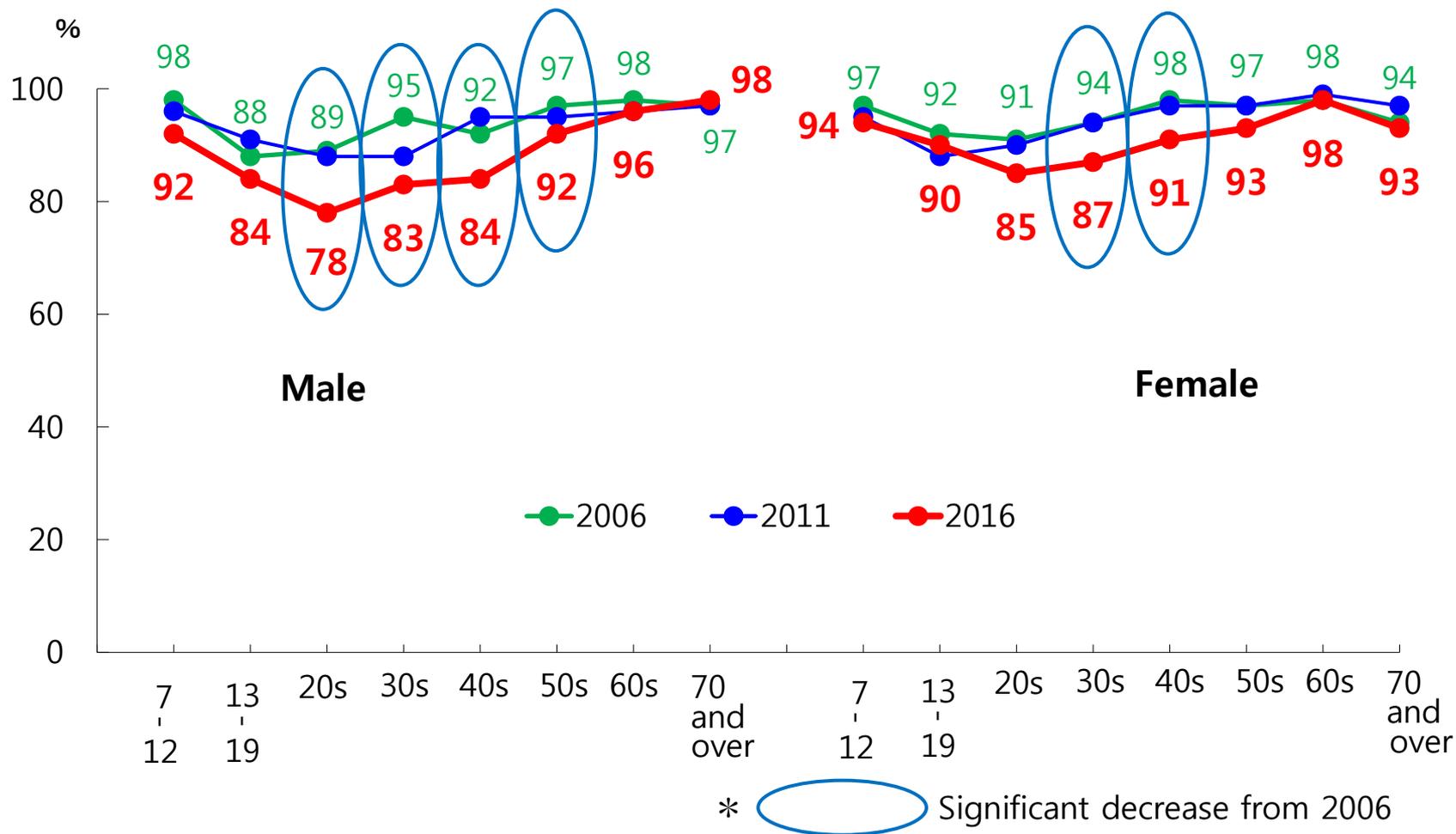
TV viewing time by age groups (2006-2016 ; weekly average)



NHK Nationwide Survey on Individual Audience Ratings

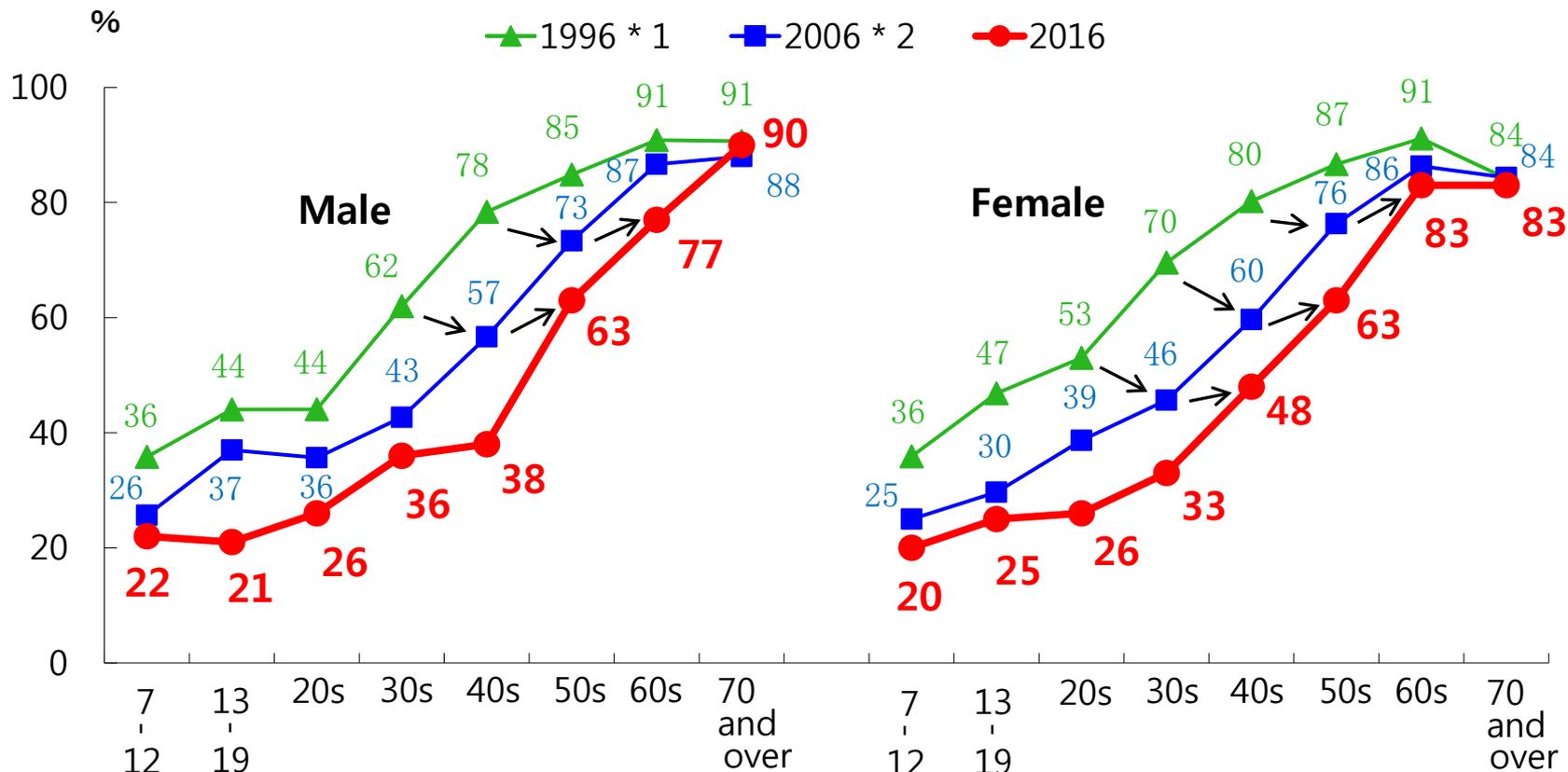
(the June 2016 Survey) 8

Weekly reach for TV Total (by gender and age groups)



Weekly reach for NHK General TV (GTV)

(By gender and age groups)



*1 Average reach from 1995 to 1997

*2 Average reach from 2005 to 2007

NHK Nationwide Survey on Individual Audience Ratings

(the June 2016 Survey) 10

Popular programs on NHK GTV

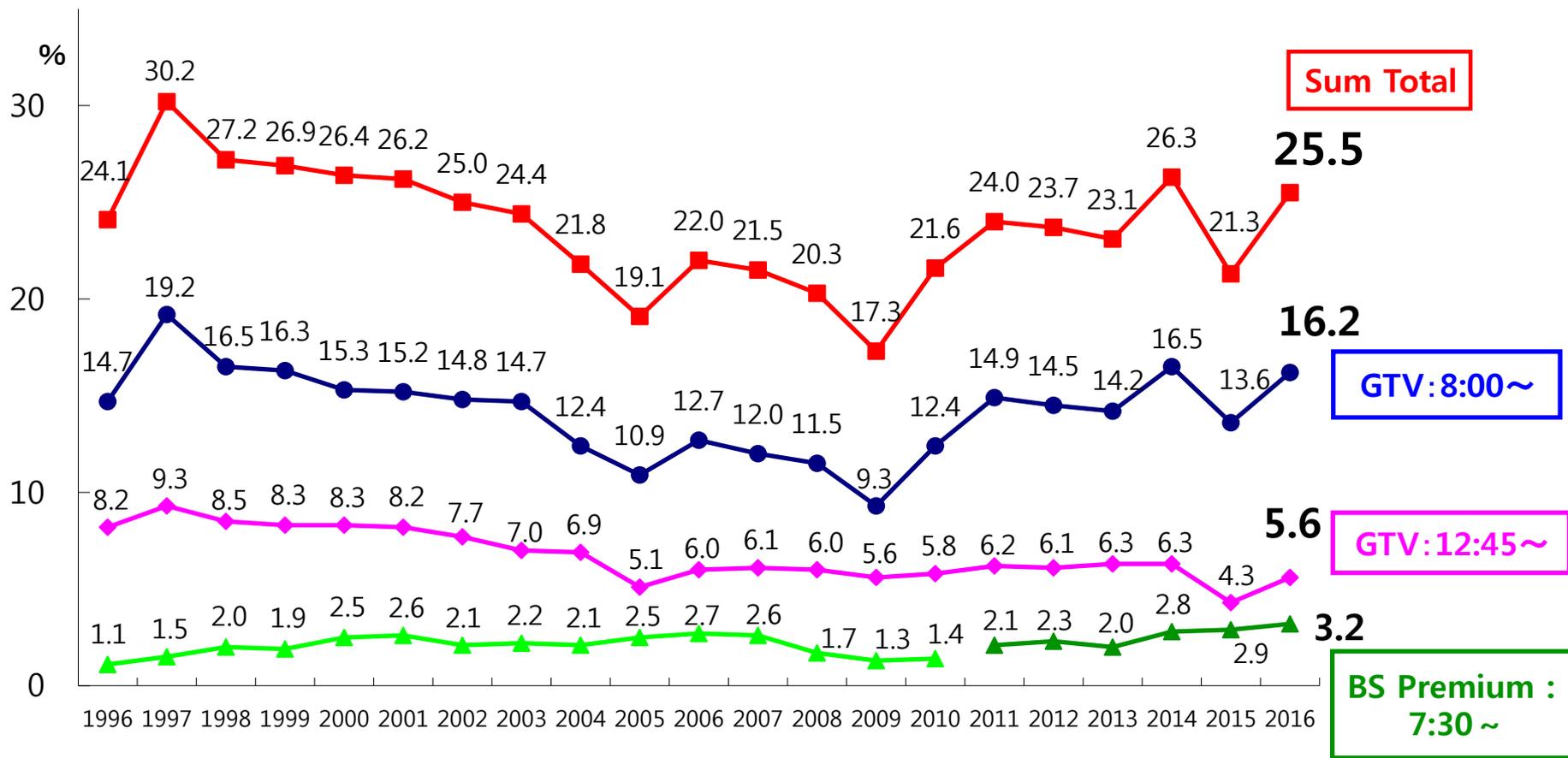
Day	Time		Program	Rating %
Mon	8:00	#	Toto-nechan (serial drama)	16.9
Sun	20:00		Sanada Maru (historical drama)	13.4
Mon	19:00	#	NHK News 7	12.6
Sun	20:45	#	News & Weather	10.2
Thu	7:00	#	News : Good Morning, Japan	9.8

shows a program with the highest rating in a series during the given week

NHK Nationwide Survey on Individual Audience Ratings

(the June 2016 Survey) 11

The NHK Morning Serial Dramas "Asa-Dora" (1996-2016)



NHK Nationwide Survey on Individual Audience Ratings
(the June 2016 Survey)

Survey on Reach

Background : Due to spread of devices and internet, "real-time" viewing rating does not cover the whole performance of broadcasters.



NHK started Reach Survey in 2013.

Objects : **TV and radio broadcasts, data broadcasts, recorded videos, websites, online videos, and SNS.**

- Nationwide (every June)
- Target: 3,600 Japanese aged 7 and above
Stratified two-stage random sampling from the Basic Resident Register
Valid rating --- 67.4% (2016).
- Self-record whether people watched or used contents or services for more than 5 minutes during one week.

Surveyed activities

Real-time Reach	NHK Programs
	Commercial TV's Programs
	Radio Programs
	Data Broadcasting
	CS/CATV
	Internet Radio

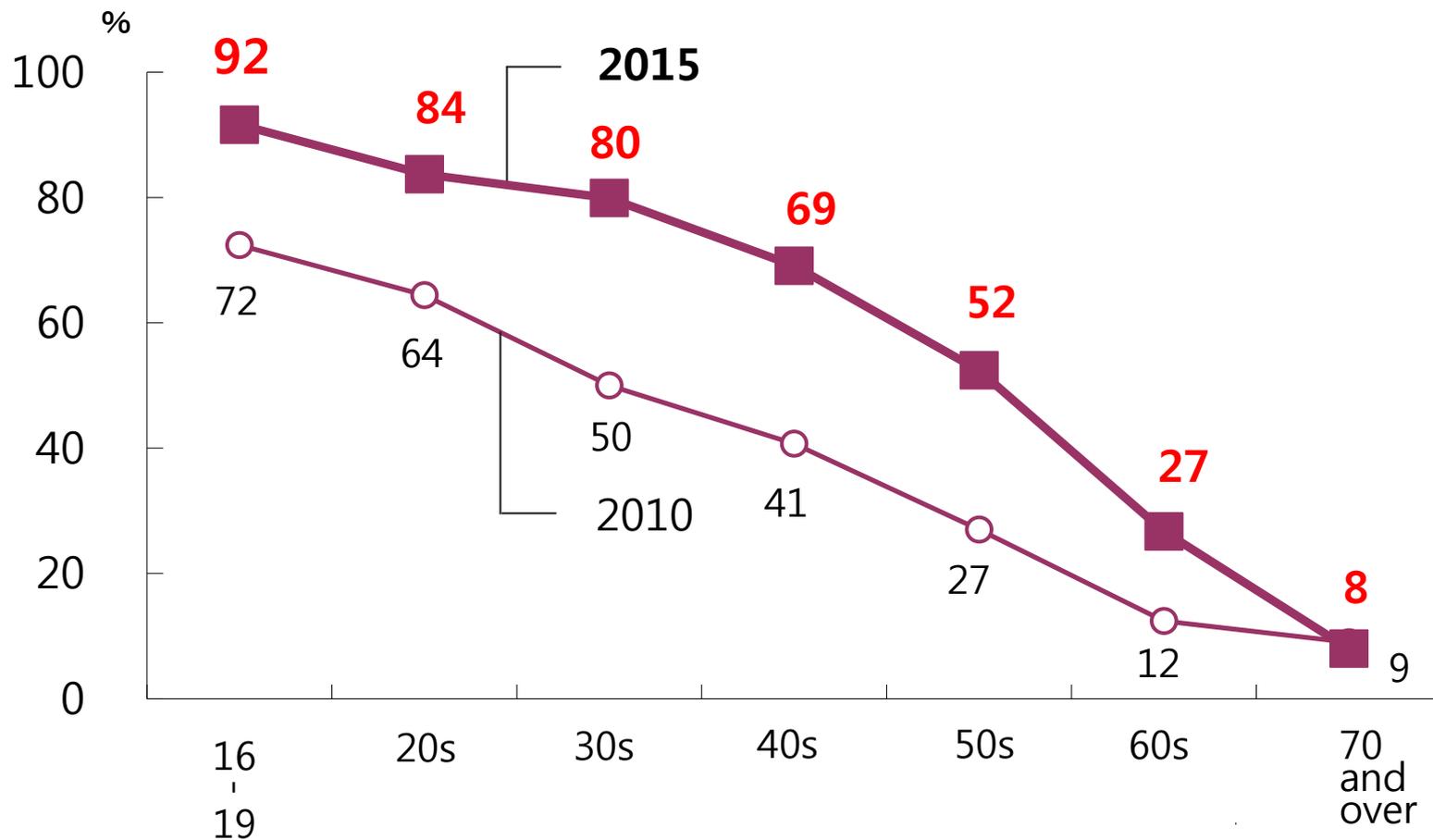
Time-shifted Reach	Recorded TV Programs
	Recorded Radio Programs
	VOD services
	Packaged TV or Radio Programs
	TV Programs on Video Site
	Radio programs on Podcast or Streaming

Internet Reach	Official Websites of Broadcasters
	Official SNS of Broadcasters
	Program Schedule and Information on the Web

Trend of Reach

%	June 2014	June 2015	June 2016
Real-time (RT)	93.2	92.3	92.2
TV + Radio	92.3	91.2	90.9
Data Broadcasting	42.3	40.7	39.9
CS/CATV	13.4	12.7	13.1
Internet Radio	4.8	4.3	4.7
Time-shifted (TS)	54.7	53.8	53.5
Recorded TV Programs	46.5	46.0	45.4
Recorded Radio Programs	2.3	2.5	2.8
VOD(requiring subscription)	2.6	3.3	3.6
Blu-ray/DVD/CD	11.7	10.8	10.8
TV Programs on Video Site	12.6	13.6	14.3
Podcast/Streaming	1.8	1.7	2.0
Internet (NET)	14.3	15.7	15.0
Official Website	8.9	9.0	8.2
Official SNS	5.4	6.4	6.8
Program Schedule and Information on the Web	7.7	9.1	7.7

Video viewers on the website (by age groups)



NHK Public Opinion Survey "The Japanese and TV" (2015)

2015 was a big year of VOD services in Japan

The logo for dTV, featuring the letters 'dTV' in a bold, red, sans-serif font.

Started from 2009 and changed to dTV in 2015.
Subscribers are 4,870,000 now.
500 yen per month

民放公式テレビポータル
TVer

2015年10月 サービススタート!

Started from Oct. 2015.
OTT video service launched by five main commercial TV stations in Japan.
Free of charge

The logo for Hulu, featuring the word 'hulu' in a green, lowercase, sans-serif font.

Started from 2011 in Japan and corrupted by NTV in 2014.
Subscribers are over 1,000,000.
980 yen per month

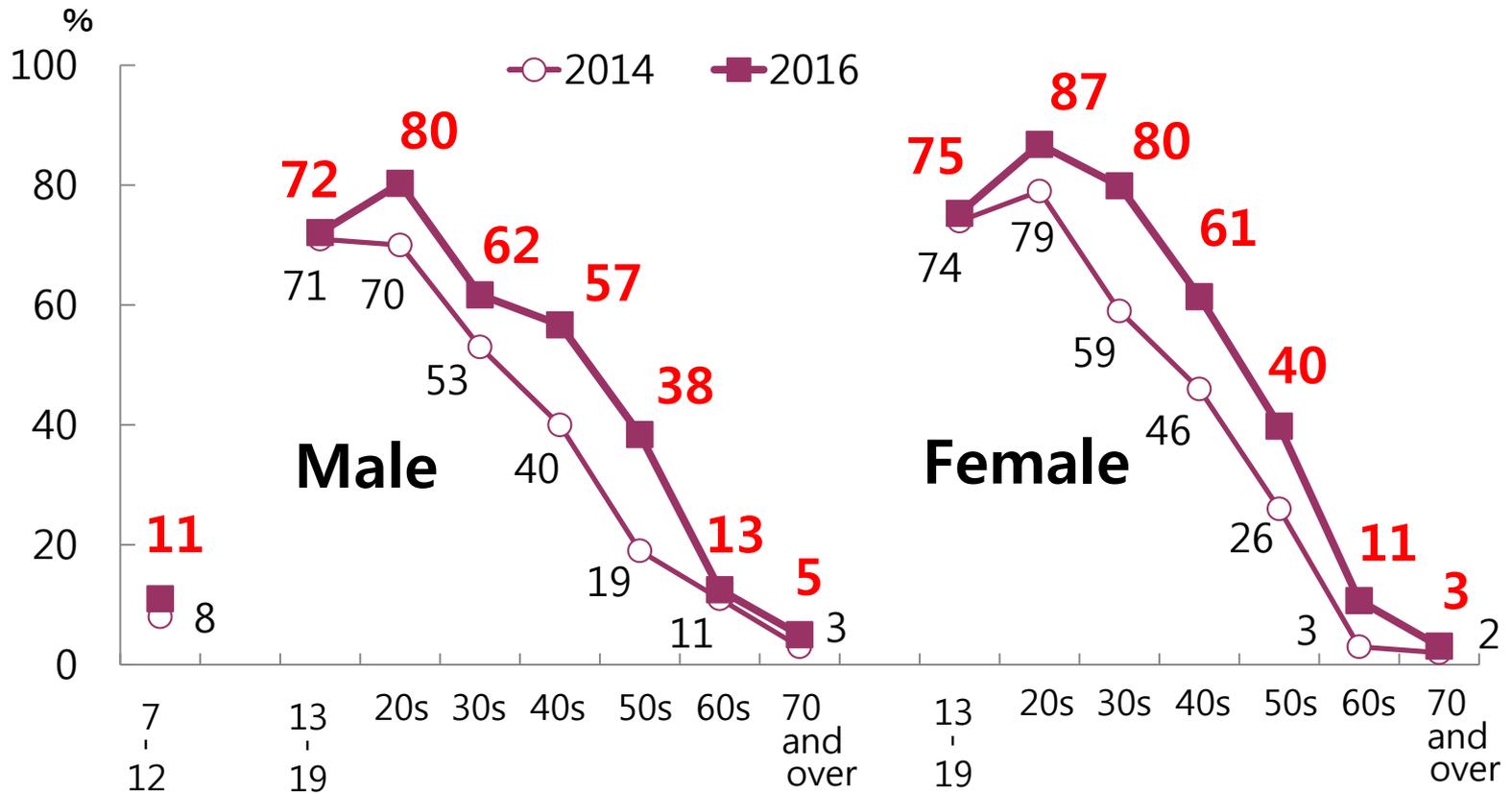
The logo for Netflix, featuring the word 'NETFLIX' in a bold, red, uppercase, sans-serif font.

Started form Sep. 2015.
650~1450 yen per month

The logo for Amazon Prime Video, featuring the word 'amazon' in black with a green play button icon, and 'プライムビデオ' in black Japanese characters below it.

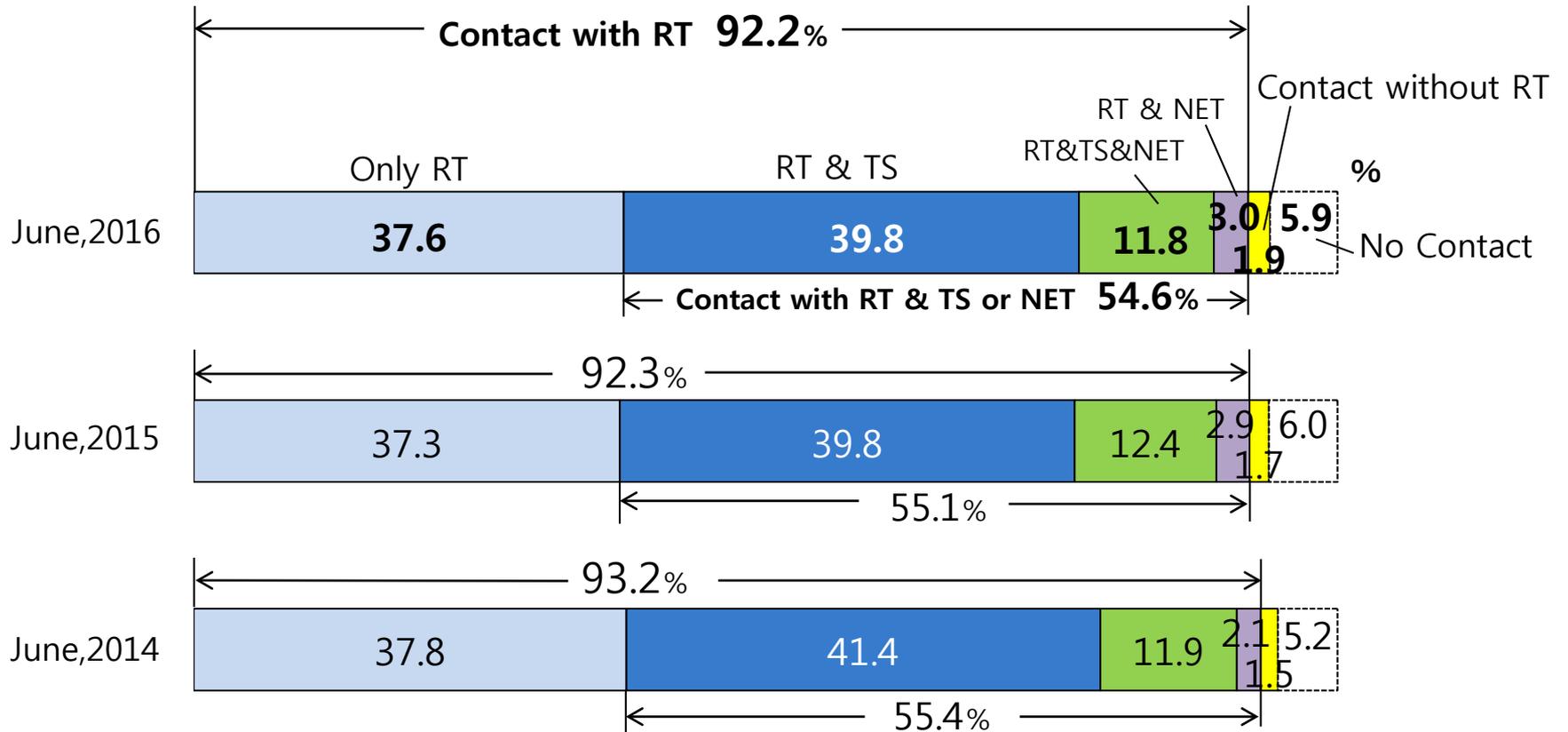
Started form Sep. 2015.
Need to subscribe Amazon Prime
(annual due is 3,900 yen)

SNS users (by gender and age groups)



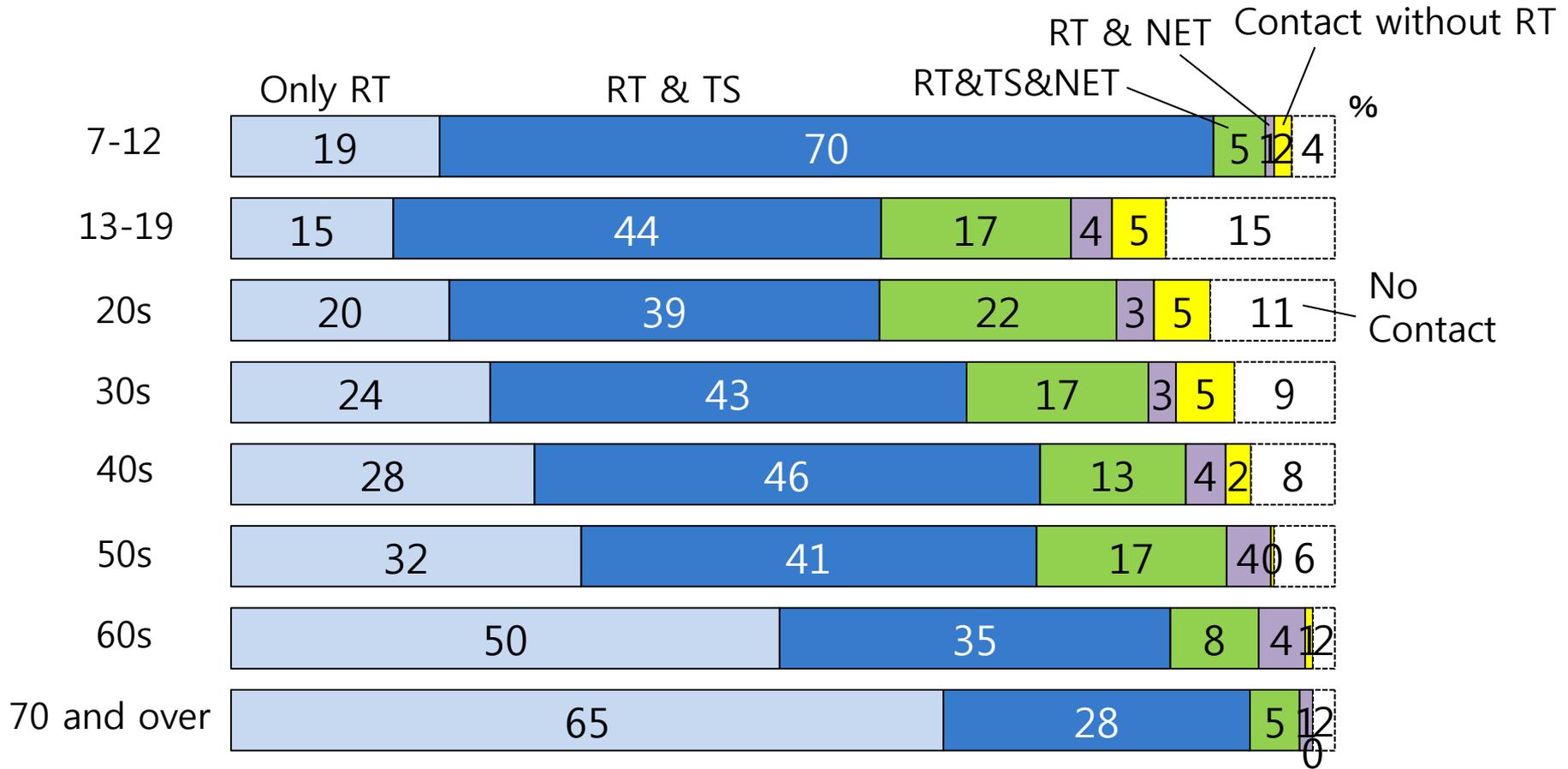
NHK Nationwide Diary-Method Survey on Cross-Platform Reach
(the June 2016 Survey)

Reach Combination



NHK Nationwide Diary-Method Survey on Cross-Platform Reach
(the June 2016 Survey)

Reach Combination (by age groups)



NHK Nationwide Diary-Method Survey on Cross-Platform Reach
(the June 2016 Survey)

Motivations for viewing videos

To kill time during dinner?

To watch missed programs?

To relax by watching favorite videos?

To enjoy commuting time?

To release stress?

Video on the Web

Real-time viewing

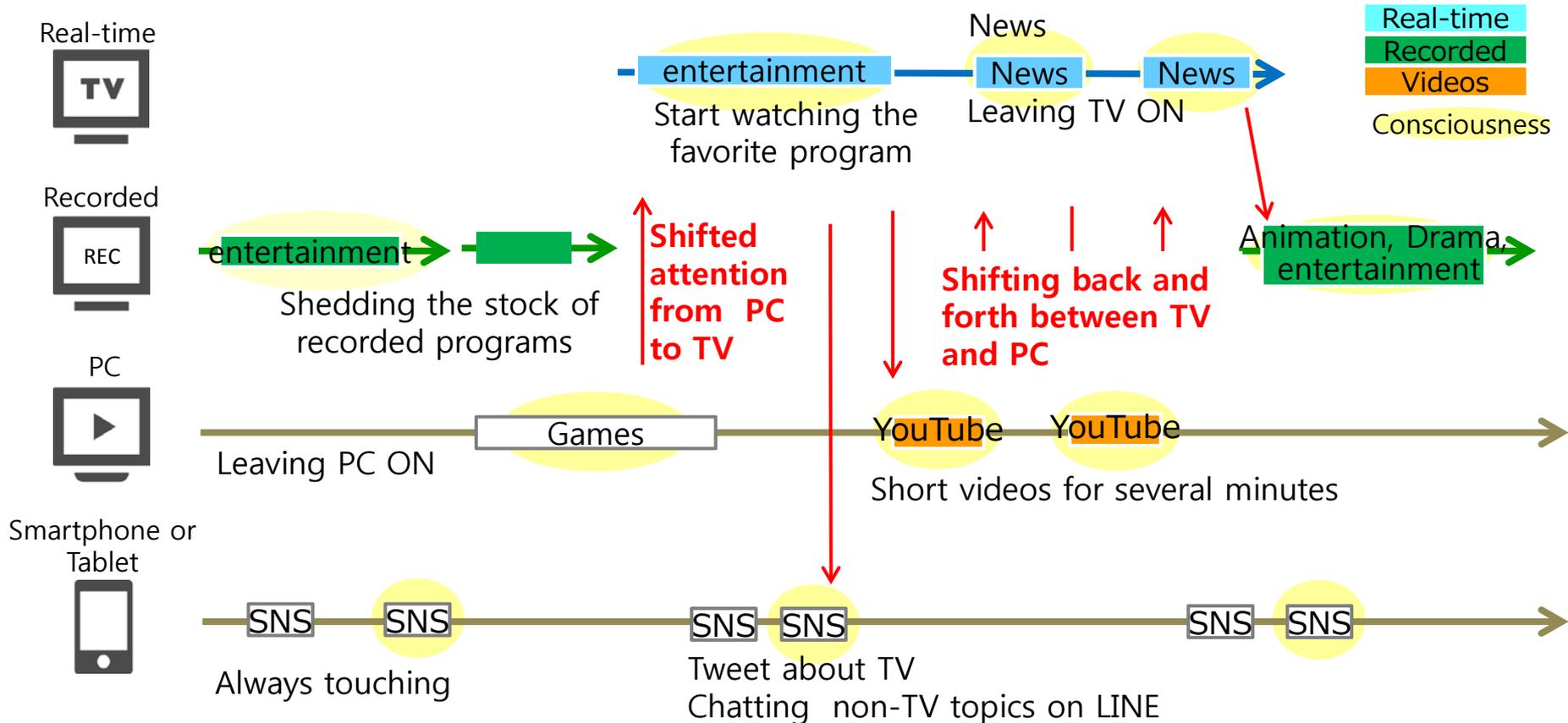


Recorded-programs



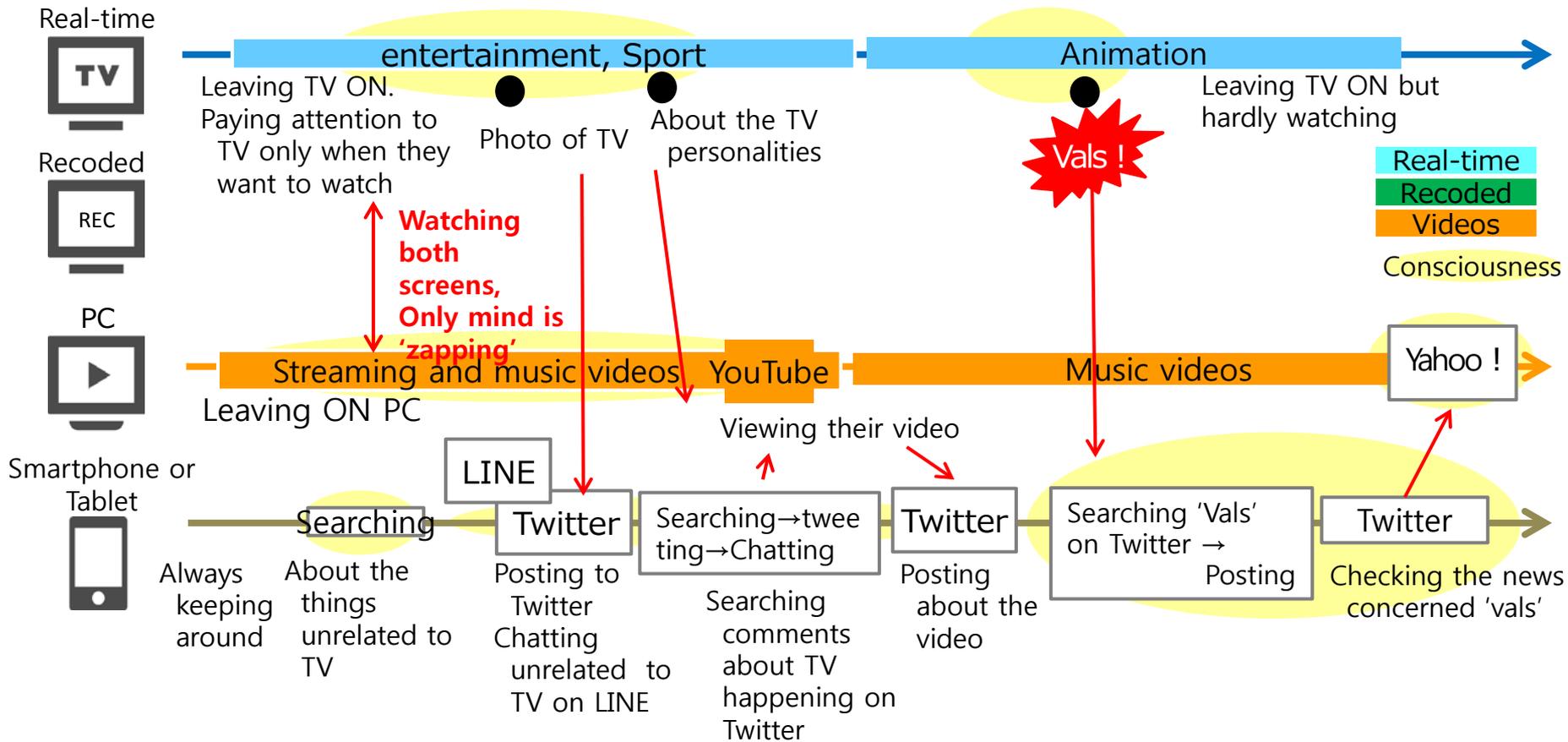
How do young people use 3 screens ?

"Tetris-type" Viewing Behavior



Focus Group Interviews on Viewing Behavior (conducted in January 2016)

"Zapping of mind" Viewing Behavior



Focus Group Interviews on Viewing Behavior (conducted in January 2016)

II. Problems and Discussion

Changing Survey Environment

1. Survey Environment

- Continual decline of survey rate
- Difficulties of maintaining longitudinal surveys
- Cost of maintaining system

⇒ Diminishing validity of the present survey method

2. Viewing Behaviors

- “Chopping” and “Unconscious media use”
- Difficulty in distinguishing “Real-time” from “Time-shifted” viewing

3. Evolving Research Method

- Advancing on-line or mechanical survey system
- Up-to-date TV viewing log analyses

⇒ lowering trustworthiness of the self-recording style survey

Changing Survey Environment

4. Video Research Audience Ratings

- Video Research has added time-shifted viewing measure from October.
- Up-to-date panel survey measuring a person's use of TV, PC, Mobile

⇒ Need to redefine "TV viewing" which we should measure

5. Increasing use of outside data in NHK

- Programmers use VR audience ratings for management
- Producers use VR ratings to improve their programs
- Digital division uses WEB access log

⇒ Lowering NHK survey's value

Second-generation NHK Survey on Audience Ratings

Broadcast Act requires NHK to conduct a scientific survey on individual audience ratings.

What kind of audience measurement does Public Media Service have to conduct ?

NHK needs to . . .

- survey **all kinds of contents or services** provided by broadcasters.
- cover **all Japanese** and “scientific (= **random**)” survey.



- “Self-recording” style survey → validity assessment to be required
- continuation of machine-scored survey
or introduction of electronic metering set
→ every possible survey is in the option

Thank you for your attention

NHK (Japan Broadcasting Corporation)

<http://www.nhk.or.jp/corporateinfo/chinese/index.html>

NHK WORLD

<http://www3.nhk.or.jp/nhkworld/zh/>

NHK Broadcasting Culture Research Institute

<http://www.nhk.or.jp/bunken/english/index.html>

(in English only)