

# Does the Czech TV market really need a saviour?

PRAGUE, CZECH REPUBLIC: Television audience measurement in the Czech Republic attracts interest among professionals at home and abroad.



Nielsen is apparently implementing its own panel of households for the measurement of TV audience under a contract with the Association for Audience Measurement (SPMS), an association set up and sponsored by CET 21 and its associate company Nova TV, one of the leading Czech commercial TV channels and Medea, a leading Czech media agency.

According to press releases from Nielsen, the company is "proud to offer a service in the Czech Republic..." The Nielsen PR makes this sound unique and original but there is no comment concerning SPMS and under what circumstances it was established and no information on the current situation in the Czech market regarding TV audience measurement. In fact you would think from the Nielsen PR what they want you to; that there is no TAM in the Czech Republic.

## Recent developments

There was a public tender for the TV audience project contract for 2013-2017, during the summer of 2011, organised by the Joint Industry Committee - The Association of TV Organizations (ATO), a national body to which all of the leading media players have belonged since 1996! Mediaresearch was announced as the winner of this tender and three other providers - TNS/Kantar, GfK and Nielsen were rejected. The reasons for rejection are publicly available from the tender committee record.

CET 21, the broadcaster of Nova TV, the current market leader, was not satisfied with the results of the tender, so they later established their own "association", SPMS and organised a "tender" with no-publicly-available conditions ... and the winner of the CET 21/SPMS "tender" was: Nielsen.

What drives this particular situation which threatens to devalue the Czech TV market from a leading up to date and professional marketplace to a third world also-ran may be apparent from the audience share development in the last 10 years.

### Audience share of population aged 15+, monthly average, 0600-0600 (24-hour period)

Source: ATO-Mediaresearch, publicly available

Group/TV Channel	2006	2012	Relative difference
CET 21 / Nova all channels	41.76%	29.85%	-28.5%
Czech TV (CT) all channels	31.26%	30.16%	-3.5%
FTVPrima all channels	20.28%	24.19%	+19.3%
others	6.70%	15.80%	+135.9%

Following the conclusion of the ATO public tender in 2011 there was an "anonymous" referral to the Antimonopoly Office against the tender process and the selection of the winner. Furthermore and no surprise here, CET 21 left ATO at the end of 2012, but is still buying the data from ATO.

Recently the Antimonopoly Office in the Czech Republic declared that the tender for TV audience measurement in the Czech Republic in 2011 for the TAM project 2013-2017 was conducted according to the rules for public tenders, including the statement that, for example, the Nielsen bid was rejected in accordance with the declared and published rules and also in accordance with the law. As one member of the JIC is the public broadcaster, the Association of TV Organizations is obligated to follow the Public Procurement Act.

The members of ATO are currently: Czech TV (the public broadcaster), Prima TV, The Association of Communication Agencies, Atmedia, TV station Ocko and associated members are Barrandov TV Studio and the Association of Audiovision Producers, so although without one of the market leaders, ATO still represents the majority of organisations interested in the TV industry.

## Current TAM situation in the Czech Republic

Let's have a look at what the current situation in TV audience measurement is here in the Czech Republic. This should provide the answer to the question in the title of this article.

Today representatives of the Czech TV market are frequently asked when they are participating at international industry conferences, "What is going on in the Czech market that it needs Nielsen to provide TV audience measurement?". When the questioner hears or sees the current status of TV measurement in the Czech market they are surprised and perplexed once again; "Really, TV audience measurement using people-meters or TV-meters was established in the Czech Republic in 1997!"

Since 2002, TAM has been provided by a company called Mediaresearch for the ATO, winning 3 consecutive tenders against all major global providers! TV measurement technologies and software have been developed significantly in the last 16 years to accommodate the inception of digital broadcasting and the current Czech TAM project compares favourably with similar projects in the most developed leading European markets and is even better, on some parameters.

The panel in the TAM project 2013-2017, run by Mediaresearch, is currently composed of 1,850 households comprising 4,500 individuals and is fully representative of the Czech TV population of 10.5 million people. So the Czech industry has a very big panel in comparison with or relative to the total population.

"Second-by-second" data for a "TV day from 6:00-6:00 a.m." are delivered to all users by 8 a.m. every day, including weekends, i.e. 2 hours after the end of the TV day! Current Czech TV audience data includes time-shifted audience (up to 7 days after live broadcasting), audience of TV-like programmes on PCs and broadcasters can also use live data, i.e. audience results delayed by only 7 minutes after live broadcasting! The Czech TV market came through the digitalisation of terrestrial broadcasting between 2008-2012 and the market is now fully digital. All means of TV reception are measured by the latest TV meters from Mediaresearch.

Last but not least there is one more enhancement called the Life Style Survey (LSS), a continual quantitative survey of the lifestyle of TV meter panel members. LSS has been on-going since 2002 and now consists of more than 18,000 questionnaires completed in total!

In other words, the Czech market has used this strong single "TV currency" for 16 years now!

And the technical quality of the data and the sophistication of the market and data users is second to none.

Does the Czech TV market need a TV audience from an alternative project, a second currency, commissioned by one of the market leading broadcasters, under the guise of SPMS?

Do we really need Nielsen as the Saviour of the Czech TV market?

You can ask any professional in market research from the Czech Republic for the answer.

Period	1997-2002	2002-2007	2007-2012	2013-2017
Provider	TNS	MEDIARESEARCH	MEDIARESEARCH	MEDIARESEARCH
Panel size (no. of households)	660	1333	1830	1850
Data delivery date (TV day 6:00-6:00)	9:00 (final at 8:00 the next day)	9:00	9:00	8:00
Technology of data transition	Land-line	SMS	SMS + GPRS	Data services (UMTS, GPRS)
Extent of the measurement	Live audience TXT audience re-playing video re-playing video recording	Live audience TXT audience re-playing video recording	Live audience TXT audience re-playing video recording	Live audience TXT audience re-playing time-shifted TV audience on PC
Number of reported channels	5	6	23	minimum 50 (more upon request)
Measurement technology	Frequency of analogue TV	Frequency of analogue TV TXT, VPS codes defaults	Frequency of analogue TV TXT, VPS codes, defaults SID codes of dig. transmission IPTV no. device (TCP-IP) Automatching	Audio-matching SID codes, dig. transmission IPTV measurement (TCP-IP) TXT, VPS codes

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