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Ipsos Connect

Passive Simplicity

The Future for TV & Radio Audience Measurement

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GAME CHANGERS

In the field of audience measurement, the greatest understanding comes from observations which have the least impact on behaviour.

At Ipsos we call this Passive Simplicity, by which we mean that the simplest and most natural research, yields the most accurate findings.

The objective of TV and Radio Audience Measurement is relatively simple; it's about counting how many viewers or listeners there are, to which channels or programmes, and knowing who these people are. We don't need to understand motivations or mood-states. Measurement with zero impact on participant behaviour should always be our goal and should be more achievable than in other areas of media and market research.

Now, as in the past, most measurement solutions rely almost entirely on sample surveys or measurement panels. These provide representative measures of the universe and employ methodologies which treat all channels and programmes fairly and equally. Two words are key here; the emphasis on **representativeness** ensuring that all socio-demographic groups are included; and the importance of an **equitable** methodology, such that no channels, genres or types of broadcast are favoured or penalised in the research implementation.

This paper explores the opportunities for evolving these systems towards better measurements for the future, to ensure that we achieve the greatest understanding of the audience, with the least intrusive approach, while maintaining the focus on high quality, representative and equitable datasets.

Media Measurement: A Time for Change?

Our media consumption has changed introducing a 'revolution of choice'. This has increased both our options for understanding audiences and the overall complexity of our measurement systems. We can get great in-depth information for some channels and some means of viewing and listening, but understanding the entire market in an equitable way, which is a key task of audience measurement systems, is not as simple as it used to be.

Critics often point to the traditional sample-based approaches as being ineffective, suggesting that sample sizes are too low and cannot deliver the granularity that digital only media measurements can. Newer approaches hint at potential solutions:

> For example, satellite or cable broadcasters are able to receive 'Return Path Data'[1] from their customers which can provide near census level measurement of activity on their broadcast platform (but not on others).
>
> Another example is the audience to internet delivered content, where cookies, server-side data and other methodologies can be hugely informative about the activity displayed on devices and screens.

These solutions are not perfect, they don't provide a full picture of the viewing audience and they certainly don't provide an equitable methodology for all. In fact, these 'Big Data' solutions don't actually provide information on viewing or listening individuals at all, but on the devices or browsers that are used. They don't even confirm for sure that there is a viewer or listener. This is an important distinction, since it is the identity and behaviour of audience members, that are important for both advertising and content evaluation.

This does not mean, however, that the measurement world can just continue as it has done for decades, simply because the panacea promised from newer 'Big Data' approaches isn't quite what we would like it to be. Equally, it doesn't mean that these new approaches have no place in current and future measurement systems.

'Hybrid' has been the buzz phrase in measurement circles for a number of years and this is precisely where this dilemma leads. 'Big Data' sources certainly have a part to play, but they cannot provide the whole. Sample surveys and representative panels will remain the core of our solutions for the future, but they are limited and will struggle in an evolving world. There is a need for clear partnership between both, and this heralds the emergence of the era of the Data Scientist.

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1. Return Path Data is information that is retrieved from a set top box, providing detailed breakdowns of activity on the set-top box such as channel changes, interactivity, etc. It can be retrieved either using the same cable as used to deliver the broadcast content (as with cable TV), or via a separate broadband or telephone connection.

Combined with modern techniques and ever increasing computing power, Data Scientists provide the opportunity for integrated and enriched datasets. They preserve the essential requirements of balance and fairness, while also adding the granularity available from the wide range of new data sources.

Even in this new environment, only survey or panel-based solutions are sufficiently representative to meet the requirement for balance and fairness. The aforementioned 'revolution of choice' has made the measurement task for these more complicated.

Linear broadcast schedules[2] no longer dictate media consumption.As such, recall-based measurement approaches can struggle to ascertain which channels or programmes, respondents have tuned into.

For approaches which have already made the transition to electronic measurement (electronic television people metering was introduced in the 1980s), similar challenges exist; viewers are no longer tied to a television set and measurement systems need to reach beyond the set.

So, our surveys and panels need to evolve. How do we do this? Technological solutions offer broad means to measure consumer behaviour and there is a renewed interest in moving to the next generation of electronic measurement, driven by supply and demand:

- Advances in consumer electronics in recent years, such as the emergence and dominance of the smartphone, and availability of self-build technologies like Raspberry Pi, mean that electronic solutions are wider ranging and more affordable than before.
- Demand has also grown for new solutions because of the difficulties with recall-based techniques and the need for larger samples to cover the more fragmented media space. Recall has long been a staple of all good market research and will continue to be key, but from a media point of view it has become more difficult with consumers viewing or listening to their personally chosen media content, when they want and where they want.

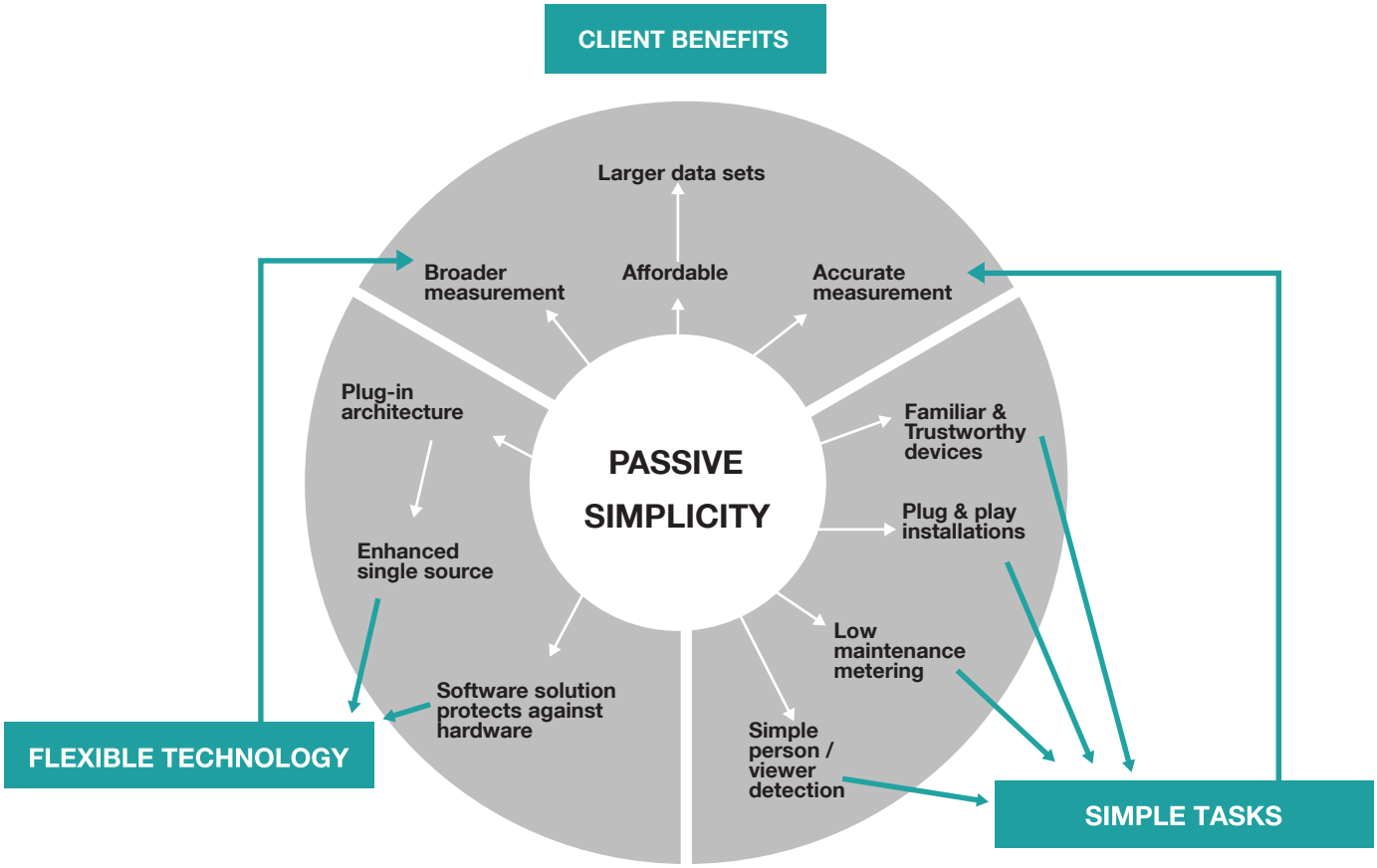
For the next generation of audience measurement, we must remember the basic principle that the best measurement comes with the least impact on behaviour. We need solutions that keep the panel member at the core of the design, building solutions around their lives, as opposed to asking them to fit their lives around our solutions.

At Ipsos we have a core vision that drives our research solutions for the next generation of TV and radio measurement and that is to embrace the principle of 'Passive Simplicity'. This means building natural solutions to deliver high quality data with a broad measurement scope, ensuring that we keep the subjects of our measurement, people, central to the overall research and technology design.

2. Linear broadcast schedules are those services such as traditional TV or radio channels in which the broadcaster controls the schedule of the content. The opposite would be on-demand content, in which the consumer chooses what they want to consume and when.

Client Benefits

The ultimate aim of 'Passive Simplicity' is to ensure that key client benefits are realised, whilst at the same time making it easy for respondents to participate. These benefits are **broader measurement**, more **accurate measurement** and **larger more affordable data** sets. To do this we start with considering what we need from our respondents and panellists.



Simple Tasks

Technology solutions generally lead to the requirement for representative panels, so we shall consider panels as the most likely deployment scenario.

We want great data quality from our panellists. This means we need our panellists to be fully compliant with our measurement requirements. As such, the measurement approach needs to make these requirements as easy and natural as possible.

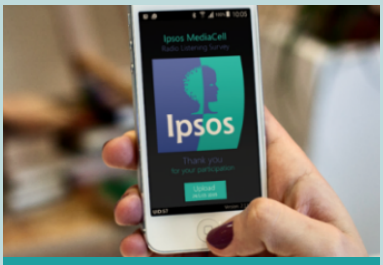
We want **familiar and trustworthy devices**. First generation meters were purpose-built hardware, which tended to be one form of black box of another. The next generation should be built around devices which already fit within the domestic environment and, if possible, should use devices that are already in place. For example, rather than asking someone to carry around a third party listening device, why not install an application onto their own smartphone to transform this into a meter. This is the basic premise of the Ipsos MediaCell smartphone solution for personal metering, in which the compliance task is for the panellist to keep their smartphone with them and keep it charged.

We want technology installations and panellists' subsequent experiences to be smooth; i.e. **measurement with minimal interaction**. The ideal is to have meters or devices that are either already installed or can be installed very easily and can effectively be forgotten by panellists. For example, in many cases the traditional people meter approach requires lengthy installation and maintenance visits from skilled technicians. This interrupts consumers' lives and moves away from the principle of simplicity. As well as the MediaCell Smartphone app, which is easily installed on panellists' own phones, Ipsos offers a range of TV people meters and TV set meters, which are based on self-installed, locked-down tablets and smartphones. The installation of these take a maximum of five minutes and once installed have few maintenance requirements, further reducing any burden on the panellist.

Meters are fantastic at identifying content. The next important thing is to understand who the listener or viewer is and, this **identification process also needs to be simple:**

- For personal meters, the process is implicit, since they carry around personalised devices. MediaCell for instance involves installing software onto their own mobile phone, which they in turn continue to carry and keep charged
- For people meter solutions, where the panellists need to declare their presence in the room when the TV set is on, then the process should be as flexible as possible and should be built around the panellist. They should have modern options and interfaces. Using software applications installed on android tablets, for instance, allows not just a natural everyday device, it also opens up the great possibilities that come from using the tablet's

MediaCell: Versatile Solutions



PERSONAL METERS

- Individual any audio media exposure, anytime, anywhere
- Individuals' own phones – all they need to do is carry and keep charged

PEOPLE METERS

- Measurement of TV set viewing and viewers
- Affordable alternative to traditional People Meters
- Simple panellist interface on an everyday device
- Self-installed & low panellist burden

SET METERS

- TV set based measurement, viewers imputed
- Scalable panels delivering larger samples and re-inforcing demographic analyses
- Enhanced passive: the meter you can forget about

Flexible Technology

The same core principle of Passive Simplicity drives our view and approach to how our software solutions are installed on our chosen technology devices (i.e. smartphones and tablets for MediaCell).

At heart, the objective in terms of technology is to make the meter work hard and not the panellist.

In the measurement space, there are a plethora of different technology companies offering their own SDKs (software development kits)[3], providing a range of measurement opportunities; including audio content recognition providers (ACR)[4], geo-location specialists, app/browser usage, Wi-Fi measurement and many more.

The best solution should be flexible and combine the best in class from all measurement offerings. This dictates an open plug-in architecture that can exploit many different solutions, all within the same basic device; again, making the meter do the hard work and not the panellist.

Another significant advantage of software solutions is that they are future-fit and protect against the risks of hardware obsolescence. Rather than being dependent on specific hardware models or solutions, a software driven approach means that the measurement can evolve.

So, the principle of Passive Simplicity means a focus on building methodologies to enable compliant panellists, with good quality data and technology choices that provide the broadest measurement solutions.

3. Software Development Kits (SDKs) allow the incorporation of independent applications to operate within other applications
4. Audio Content Recognition (ACR) solutions are technologies that are able to determine the content of an audio broadcast by comparing a digital fingerprint of the broadcast, to a reference library.

Vision for the Future

Returning to the opening point, the greatest understanding comes from observations with the least impact on behaviour.

In the video and audio measurement world, advances in consumer technology mean that we stand on the edge of the next leap forwards. We can start to deliver the broader, more accurate and more affordable measurement solutions that the industry needs and we can do so using passive measurement solutions, which improve the accuracy of our overall measurement.

By 2025, we foresee a measurement landscape which will revolve around the following:

- Representative and equitable panels will still be at the core of audience measurement.
- Data scientists and hybrid solutions will multiply.
- Countries will move away from separate industry measurements and look for consolidation, which will be enabled by advances in measurement technology.
- Smartphone meters will provide broad cross-media measurement, with multiple solutions working in parallel within the same device, extending capabilities beyond audio and video to capture more media such as out-of-home and press.
- More and different consumer devices will be adapted to provide truly passive measurement solutions, benefitting from the increasing 'Internet of Things' and the software driven home.
- TV people meters will evolve to the next generation with much smarter devices, such as tablets. These will be based around standard consumer technology and will measure much more than just the TV set.
- People meters will move away from actively requiring panellists to declare that they are present in the room when the TV is on, which is the norm for identifying viewers. Meters will be able to model and detect who is present.
- There will be a significant increase in the number of radio markets moving from traditional recall based methods to either pure passive electronic measurement solutions or mixed solutions with a combination of passive electronic and recall based measurement.

The objectives of audience measurement will not change. It will remain a business built around understanding people. What has to change is how central these people become within our measurement designs, how we minimise our impact on their behaviour and in turn how we improve the accuracy, scope and affordability of our industry currencies.

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Ipsos Connect is a global specialised business to co-ordinate Ipsos services in the domains of Brand Communications, Advertising and Media. As the world of brand communications, advertising and media become increasingly complex, fragmented and digitalised, Ipsos is helping clients better embrace this modern complexity with investment in new approaches and products that will fit with the digital age. Ipsos Connect aims to be the preferred global partner for companies to measure and amplify how media, brands and consumers connect through compelling content, great communication and relevant media planning.

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