

KEEPING THE SHOW ON THE ROAD

Audience measurement in times of crisis

By Andrew Green | May 2020

**IPSOS
VIEWS**

GAME CHANGERS



FROM CRISIS TO OPPORTUNITY

There are many things that prevent or slow change in both life and business. These include fear of the unknown, natural caution and even a feeling that if something isn't broken there's no need to fix it. Within the Audience Measurement world, there is a critical need for stability and reliability, so change – if it is to occur – must be managed carefully.

But when change is forced upon us, we must take advantage of the opportunities it can throw up to learn as much as we can about alternative methods of achieving the same goal: delivering robust and credible audience data.

The COVID-19 crisis invites us to be bold. It has had three main effects for audience measurement:

1. Face-to-face interviewing is now almost impossible, interrupting many of our audience measurement studies.
2. Enforced isolation at home has led to big changes in audience levels to different media.
3. New competitive pressures have emerged for certain media.

With so much going on and the future looking fuzzy, this is not a time to stop measuring. Instead, it is a time to investigate alternative virus-resistant methods, both so we can keep abreast of the rapid changes happening in the world, and so we can ensure our clients are better equipped to cope with future disruptions.

BEYOND THE GOLD STANDARD

None of the methods we need to test are new. But in some countries, they have yet to be tried in the audience measurement area. Face-to-face interviewing, for many, has remained the 'gold standard' due to its high-quality sampling and superior data collection. But, in many cases, there was no Plan B. At the very least, there is an imperative to understand the impact of other methods on audience levels and to rehearse the processes needed to implement them in any future scenario.

Around the world, a number of media studies have already introduced online or telephone data collection, either in whole or in part, to studies previously carried out face-to-face. As a result, there is a wide body of international evidence suggesting that other methods can deliver valid and robust results and, with people at home and more willing to engage in research than usual, now is a good time to test them locally.

Technologies have also been developed to complement or even replace survey data. For example, Ipsos has developed and implemented a project for the BBC in the UK to capture cross-media, cross-platform audience data using a virus-resistant (i.e. passive) approach. It deserves to be studied closely by broadcasters and other media operators.

We have also created a participant-free method of tracking travel movements, with potential application for the Out of Home (OOH) industry.

As well as all this, a number of data science methods have been developed within audience measurement studies to build on the survey data and improve audience estimates.

Face-to-face interviewing has remained the 'gold standard' due to its high-quality sampling and superior data collection. But, in many cases, there was no Plan B.

TESTING TIMES

We recommend that media organisations consider the following actions during the crisis:

- **Test** new methods and approaches. Face-to-face interviewing is not currently an option in many locations, although we expect it to become available to us again in the future. Now is the time to try out other ways of recruiting respondents and collecting data while people are at home and more likely to engage in research. These methods may not completely replace face-to-face interviewing, but testing now offers us insight into how they could complement it in the future.
- Consider **respondent-free options**. An example of this is the recently launched Population Movement Atlas which enables passive tracking of the movement of vehicles and people. This will be particularly useful as a stopgap for OOH companies wishing to track how travel recovers in countries emerging from lockdown.
- **Leverage Ipsos' learnings** gained from four years of running 'Compass', a passive, single-source, cross-platform, cross-media study for the BBC. It offers a proven, high quality, virus-resistant solution for tracking audiences across multiple media.
- **Embrace modelling**. Statistical techniques are constantly being improved and Ipsos is getting better at harnessing the power of statistics to plug gaps in survey data or to enrich device-based datasets, as well as in processing 'Big' and unstructured databases.

KEEP MEASURING

Audience measurement underpins the buying and selling of advertising inventory, as well as the creation and scheduling of content. Like every industry, measurement is facing new realities. One of them is that audiences are changing very rapidly during this unusual time. This demands methods that enable quick turnaround.

Competition has not gone away. There remains a pressing need for media organisations to keep abreast of how audiences are behaving. Broadcasters are being presented with a rapid uptick in video and audio streaming at the same time as they have been forced to halt production of new content. They will need to work to keep their audiences.

Newspaper and magazine publishers are facing the closure of many retail outlets that sell their products as well as difficulties in distributing printed copies. They are relying more heavily on their digital products – which must compete against a mass of news sources.

Out of Home (OOH) vendors are having to react to lower traffic volumes as most people still go out of their homes, just not as often and not to the same places. This audience reach needs to be tracked and marketed.

The crisis will eventually pass. The media need to be ready for more 'normal' times to resume. But in the meantime, there is a strong case for them to take advantage of some of the opportunities thrown up by people being forced to stay at home for prolonged periods.



UP, UP AND AWAY

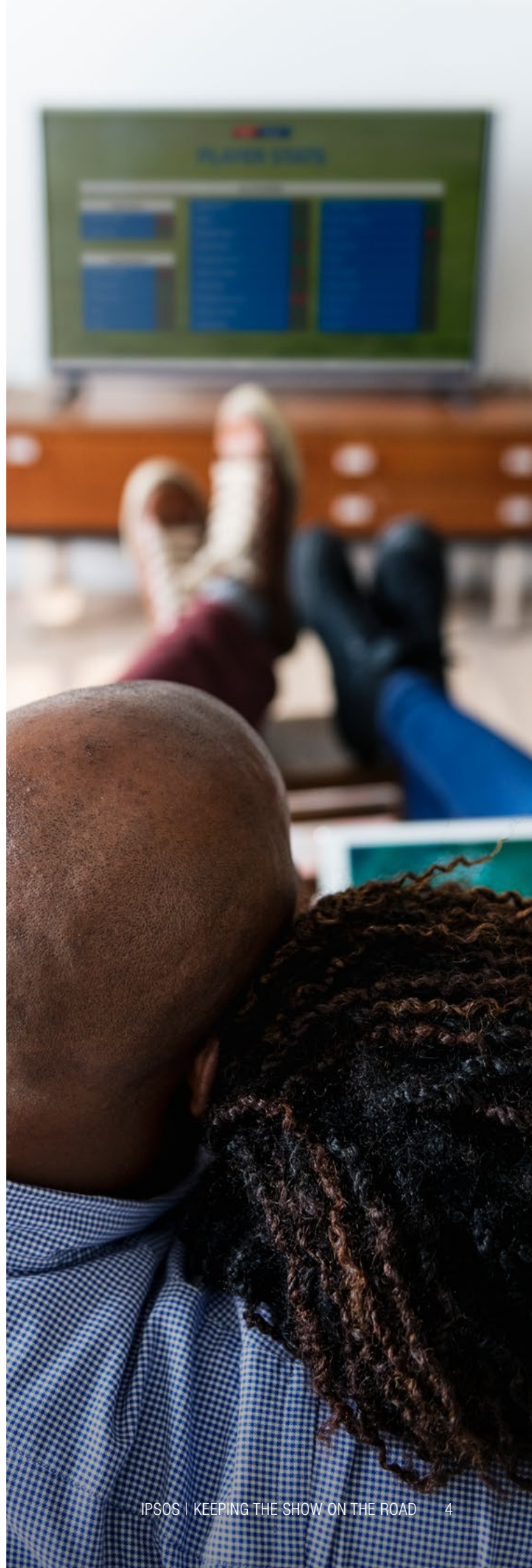
Media audiences have changed quite dramatically during the crisis, and this is as good a reason as any to keep measuring. Media usage in general is up as people find they have more time on their hands. Television, online and radio usage have risen in many countries, although cinemas have been widely shuttered, and travel has been sharply curtailed, reducing audiences moving past OOH frames.

Conviva reports that internet streaming climbed sharply in March, up nearly 30% in the Americas (26% in the US) and 20% globally over the course of the month, as viewers began adhering to social distancing guidelines. Daytime streaming tallied the largest increases, with the 10am-5pm window up nearly 40%, as stuck-at-home viewers streamed news, dramas and movies throughout the day.

In the UK, where Ipsos tracks time spent online alongside television and radio, online minutes grew by 28% in the first week of lockdown compared with the average across the first ten weeks of the year. High levels of media usage continued during April.

In the Adria region (Croatia, Serbia, Slovenia and Bosnia & Herzegovina), where Ipsos also tracks internet audiences, the number of website visits in the first half of March was up 45% compared to last year. In the second half of the month they rose by 86%.

Americans are also found to have streamed 126% more minutes of video in the last two weeks of March 2020 than in March 2019, according to Nielsen data.



COUCH POTATOES

Television is another case in point. Year-on-year viewing levels in the first week of lockdown compared to similar periods in 2019 were up by 41% in France, 33% in Italy, 31% in the UK and 21% in Lebanon.

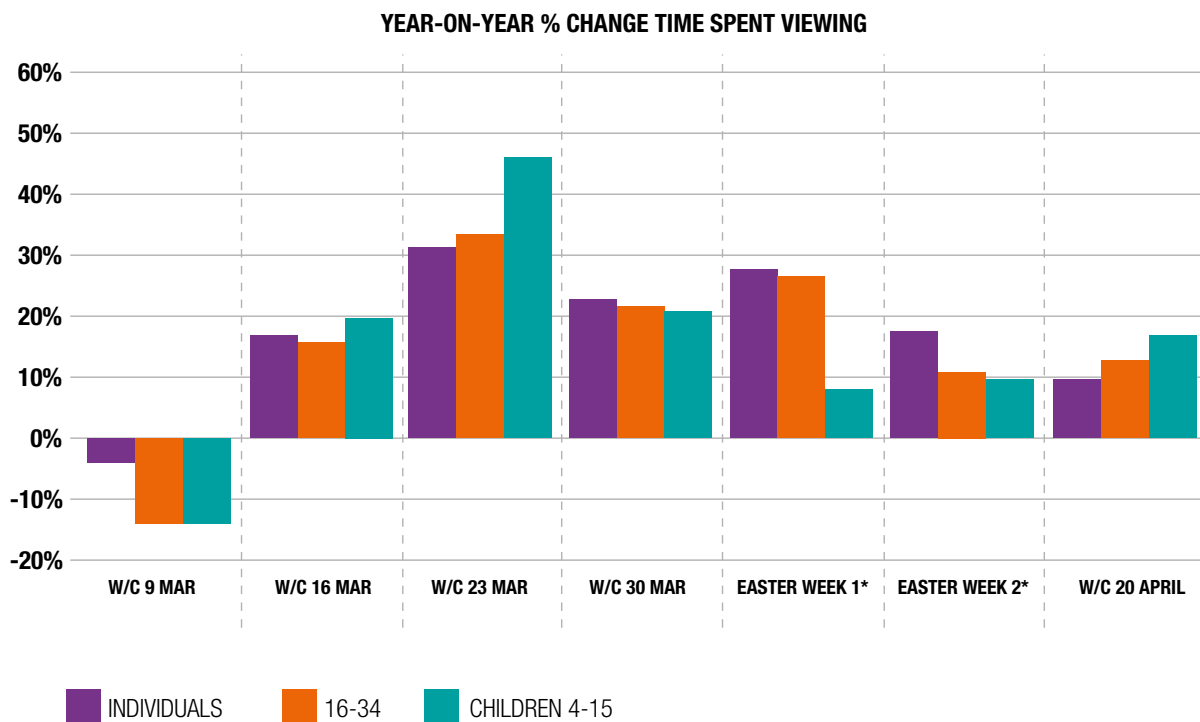
The crisis is also having an impact on when people watch. Between the first and third week of March, for example, daytime viewing in Saudi Arabia increased by 19%. In Australia it was up by 38%.

It has become hard for broadcasters to continue making new content during the crisis, which may have a negative impact in the medium-term, as the flow of new programming dries up.

This lack of new material could in time exacerbate a trend already being seen for people to stream video more. In the United States, streaming accounts for nearly a quarter of all time spent watching TV and movies. In the UK, 'unidentified' viewing (i.e. viewing that is not linked to one of the established broadcast channels, which includes streaming services such as Netflix and Amazon) is close to one third of all viewing time.

Time spent viewing TV in the UK is significantly up for the lockdown period and Easter break compared to last year (see figure 1). This continued into April as data shows that for the week commencing 20th April (which would have been a normal school week), children's viewing saw the biggest year on year increase (up 17%).

Figure 1 UK viewing trend by life stage



Source: BARB w/c 20 April 2020. All data based on live & VQSDAL TV set viewing. Consolidated & device viewing data not yet available
 *Easter week 2020 compared with Easter week 2019

LOOKING AHEAD

We expect face-to-face interviewing to resume in the latter part of this year, although its re-introduction is likely to be gradual, as both interviewers and participants get used to being in the company of strangers again.

As the world gets back to whatever the new normal turns out to be, advertisers will return, and the media will need to tell them how they can reconnect with their target audiences. The measurement systems cannot and should not stop. Instead, we should continue to offer insights into when and how media audiences are changing and evolving.

We should also make sure we learn as much as we can about complementing studies previously carried out 100% face-to-face with other methods so we can understand and quantify any impact they may have on reported audience levels.

Measurement cannot and should not stop. We should continue to offer insights into when and how media audiences are changing and evolving.



FURTHER READING

Alternative Media Research Methods, Ipsos (March 2020): https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-04/ipsos_alternative_media_research_methods_0.pdf

By **Andrew Green** Global Head of Business Development, Audience Measurement, Ipsos

AUDIENCE MEASUREMENT SOLUTIONS

Ipsos already offers a number of virus-resistant solutions, including a new **Population Movement Atlas**, which enables passive tracking of the movement of vehicles and people. It offers weekly updates on vehicular and pedestrian volumes by panel type (roadside, retail or transit) and can be configured to deliver more detailed breakdowns such as daily or even hourly movements. More granular geographic and other analyses are also possible.

Additionally, **MediaCell for Cross-Platform** is a passive, single-source, cross-media, cross-platform system for measuring and reporting audiences to online, television

and radio media. An app downloaded to respondent's smartphones automatically and continuously detects audio signals from TV or radio content people are exposed to and captures details of the websites and apps they access.

For a full overview of the different approaches being used around the world to measure audiences, visit Ipsos.com: <https://www.ipsos.com/en/solutions/list?search=Audience%20Measurement>