Ipsos MediaCT
The Media, Content and Technology Research Specialists

Ipsos

Is Research Keeping Up With Technology?

Changing Media Landscapes

Bite Sized Thought Piece

2008

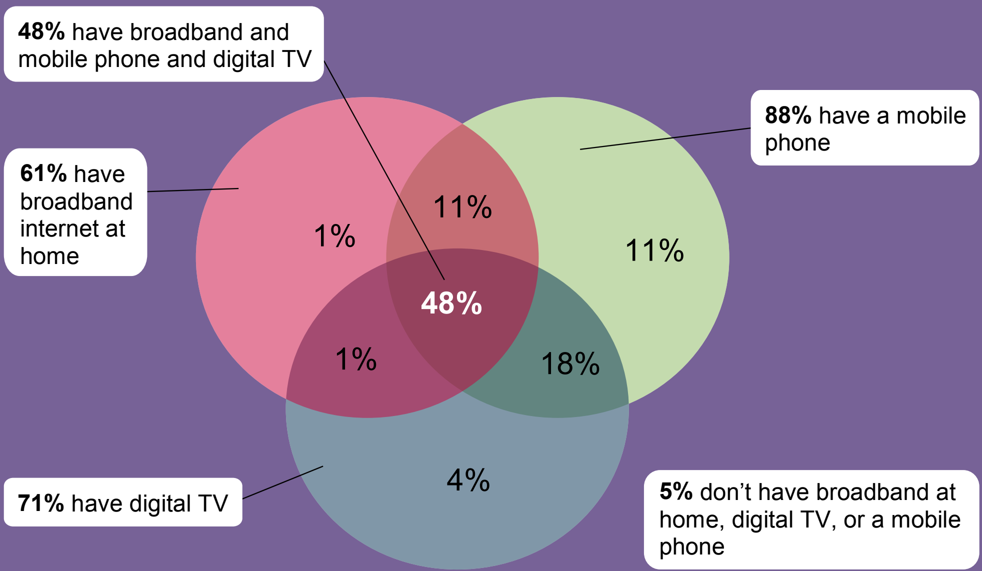
In the 1990s, media fragmentation was characterised by a growth in media choice – more TV and radio stations, more magazines, more of everything. In the current decade fragmentation has crossed media platforms – it is possible to listen to the radio on a TV, to watch TV on a mobile phone and to access the internet from anywhere. Media owners are increasingly running businesses that span more than one medium and they want to measure them all.

This rapid pace of change in media consumption has placed increasing demands on the measurement systems that already exist. The quantification of fragmenting and diversifying markets present real challenges, something which has recently been described by Erwin Ephron in his blog as "trying to count grains of sand with your fingers".

Understanding the impact

The Ipsos MediaCT Technology Tracker is a monthly tracking study that has been running via our face-to-face omnibus since 1997. It monitors the uptake and usage of technology items including mobile phones, internet, broadband, digital TV and radio, and MP3 players. Vital statistics are available across key demographics.

Recently, the focus has centred around the convergence of some of these technologies; a topic that is of particular interest as suppliers are looking to bundle packages into one price offering. An example looking at the overlap between users of broadband, mobile telephones and digital TV is shown below.



Base: 2060 GB adults aged 16+
Survey period - May 2008

Additional research has identified optimum bundle and pricing information in this sector. Other studies carried out by Ipsos MediaCT in recent years include TEMPO (Tracking Digital Behaviour) and Engage (looking at the impact of new media technologies).

The industry contracts

The industry contracts are often talked of in terms of silos, with the impression given that they are unable to break free from their traditional methods. Ideally the diversification in media behaviour could be measured simply by increasing their scope but, arguably, they are already over-burdened and there are, of course, quality issues that prevent this. That said, there are more subtle ways in which they can extend what they measure.

RAJAR have started using online re-contact surveys to look at podcasters and those listening to the radio via the internet. Response rates are in line with expectations and results from early waves are consistent. The signs are that this will be a very effective way of identifying this particular niche audience.

On the NRS, at the end of the CAPI interview, a self-completion questionnaire can be deployed to collect additional information. This will typically be given to respondents to fill in whilst the interviewer is packing up. It is an efficient way of collecting more detailed media consumption data and adds no real extra time to the survey process.

Technology and data collection

Technology has reshaped the market research process, from the introduction of CAPI through to multimedia and double-screen CAPI. Today we can go even further.

On the BARB Establishment Survey, we are introducing interactive help screens for interviewers to help them identify particular types of television packages/platforms within the CAPI interview.

For Postar, we are deploying state-of-the-art GPS meters that will accurately record how respondents move through the environment and their exposure to Out Of Home advertising messages.

More radical answers?

If there were a way to collect the data we need without the respondent having to search his or her memory, this would indeed be valuable. This idea has led to the development of passive meters – small pager-like devices respondents are simply asked to carry as they go about their daily business. These can detect the radio and TV they listen to/watch, and perhaps even the things they read. It may be too early though – the work that has been carried out so far suggests that there are significant problems with respondent compliance. Ipsos MediaCT has concentrated on its own development – a software-based meter that runs on a mobile phone. Our belief is that this will become a major tool in the audience measurement armoury.

Technology and Ipsos MediaCT

The identification and use of new technology is something that has impacted our business too. We have seen a significant uplift in our clients' use of new technology and, in response, have adapted our offering from a more traditional research approach to one which includes technology at the heart of our thinking. To reflect this change

in emphasis, we have rebranded ourselves as Ipsos MediaCT with the ‘C’ representing Content and the ‘T’ for Technology.

In the coming years, we see our mission as helping the media industry by providing research that is relevant and actionable in this changing environment. Our strength in researching and measuring traditional media, allied with our understanding of technology, means that we are well placed to work with our clients to take the industry forward and to measure Ephron’s grains of sand.

For more information, please contact

Richard Windle, Managing Director
Tel.: +44(0)20 8861 8043
Email: richard.windle@ipsos.com
www.ipsos-mori.com

Neil Farrer, Director
Tel.: +44(0)20 8861 8149
Email: neil.farrer@ipsos.com
www.ipsos-mori.com