Media research and audience measurement in a time of crisis: no turning back

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What is asi?

- Organised the International TV and Radio conferences for the last thirty years
- Recently incorporated the PDRF Publishing & Data Conference which has been running even longer
- Global community of media research experts, media owners, agencies and advertisers
- Regular media industry podcast (111 episodes so far!)

So what did we do?

- 18 video interviews with senior executives
  - TV and radio currencies across ten countries
  - The four major measurement companies that cover nearly all major markets
- Conducted during lockdown via Zoom from 7th April to 12th May 2020

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So what did we do?

- Available via the asi site (www.asiconferences.com) from tomorrow (Wednesday):
  - Three overview videos
    - 1. Keeping the TV ratings going during a global pandemic
    - 2. A ‘new normal’ for media measurement
    - 3. Radio measurement in a time of crisis
  - Also available as audio podcasts via iTunes, Spotify and the asi site

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With thanks to..

- The measurement companies:
  - Toni Petra, EVP Media, Nielsen
  - Andy Brown, Global CEO and Chairman, Kantar Media
  - Rolf Müller, Global Director, Business Development, GfK
  - Andrew Green, Global Head of Business Development, Ipsos
  - Chris Mundy, CEO, RSMB

With thanks to..

- The currency clients
  - Romil Ramgarhia & Derrick Gray – BARC, India
  - Sylvano Luchetti & Doug Peiffer – OzTAM, Australia
  - Justin Sampson – BARB, UK
  - Kristian Tolonen – NRK, Norway
  - Tanja Hackenbruch – Mediapulse, Switzerland
  - Julien Rosanvallon – Médiamétrie, France
  - Pirjo Svedberg – MMS, Sweden
  - Frans Kok – NLO, Netherlands
  - Sjoerd Pennekamp – SKO, Netherlands
  - Ricardo Gomez-Insausti – Numeris, Canada
  - Davide Crestani – Auditel, Italy

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The next hour

- Impact of lockdown on media consumption and ad spend
- How are the currencies and research suppliers coping?
- Eight predictions for the future..

- ...and then hopefully lots of discussion about what you agree or disagree with!

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1. The impact of COVID-19 on media consumption

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TV ratings impact

- A (literally!) captive audience hungry for:
  - News updates
  - Escapist entertainment
  - However some evidence that this has fallen away
    - Transition to summer when ratings drop anyway
    - Lack of any sports content
    - Programme production drying up
    - News fatigue
    - (Possibly) screen fatigue in a world of home working and Zoom
- Some signs returning to normal in China (until next wave?)

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TV ratings impact

- Yes, reach and volume of SVOD viewing (Netflix, etc.) has grown but so have linear broadcast TV and BVOD (TV online players) to a similar degree
- Nostalgia, a key genre in many markets (psychological yearning for a safer past), classic repeats even sports repeats getting high ratings
- Just as well, given likely reliance on archive content for the foreseeable future!

Radio ratings impact

- Generally reach is down, as drivetime/commuting and work listening are key usual components of the audience
- ...with increased hours amongst those who are listening at home
- However pattern is not universal
- ...and information is not comprehensive as countries reliant on face-to-face have ground to a halt
  - Of the 24 countries that Ipsos operate only 12 are currently running

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Readership impact

- Data even more affected by crisis as readership surveys the most reliant on face-to-face
- Of the 35 national surveys conducted by Ipsos (the market leader) 25 are wholly or in part face-to-face

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Ad spend impact

- Almost universally down for TV and radio, figures cited of >40%
- Media owners argue that past research shows companies that carry on advertising during a recession recover more quickly afterwards
  - ...but this is not a recession, this is an unprecedented crisis
- Some advertisers have worked well to adapt their messages to offering help, support and understanding, but some sectors have been completely wiped out: travel, leisure, hospitality
- Clearly a disaster for print but some evidence of a boost to print subscriptions (direct delivery) in metropolitan areas

The next crisis will be one of funding…

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2. How are the currencies coping in a time of crisis?

TV currencies mostly unscathed in short term

- All the TV / video currencies we spoke to were continuing to produce daily data because:
  - They are panel-based
  - Use passive meter measurement in homes
  - Staff successfully transitioned to home working
  - Panel management is actually seeing higher contact and compliance due to a captive audience….

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How long can this continue?

- If face-to-face for is being used for Establishment Surveys then universe estimation isn’t possible
- ...although more and more countries have already abandoned face-to-face
- Can’t recruit new panel members – long-term panel decline and imbalance
- Can’t visit homes to install or repair equipment, leading to creative approaches..

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…so TV currencies mostly unscathed in short term

- Primary concerns:
  - How long can they continue freewheeling without ’gas in the tank’?
  - Funding crisis likely before too long
- However some optimism:
  - Crisis has accelerated innovation in working practices that can continue and benefit clients in terms of cost savings
  - Research industry reacted early and effectively and clients have been very positive about their suppliers

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Impact on radio measurement varies greatly depending on the methodology used…

- Passive (metered) measurement or claimed recall?
- Fresh samples each wave or panels?
- Countries using Portable Meters (Nielsen PPM, Médiamétrie Rate-On-Air, GfK Mediawatch) are carrying on in same way as TV panels (e.g. US, Canada, most of Scandinavia)
- Countries using face-to-face have halted all fieldwork (e.g. UK, Italy)

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3. The death of face-to-face interviewing?

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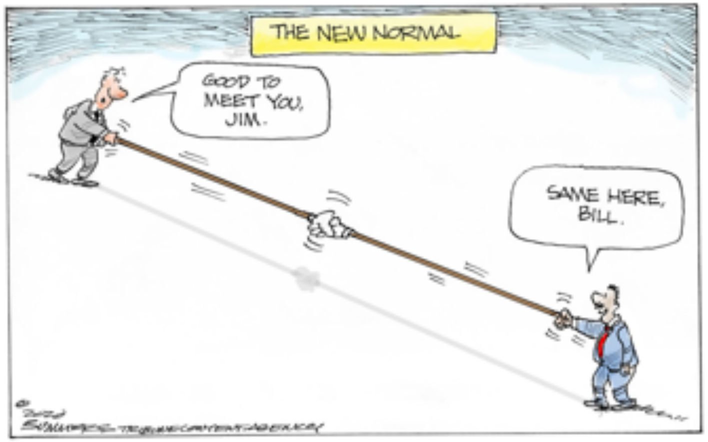
Will the crisis accelerate the death of face-to-face?



- Face-to-face issue disproportionately impacts:
  - Publisher currencies (although online elements can continue in some cases)
  - Radio currencies, elements of Outdoor surveys
  - TV research if face-to-face used for Establishment Survey or recruitment

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Arguments against face-to-face surviving

- Media measurement one of the last still to be using it, and this crisis may be the final straw…
- …driven by cost, but also:
- Unwillingness of public to participate
- Face-to-face interviewing seen as a high-risk job
- Atrophy of field units during crisis
- Huge contrast in the crisis between those countries/services that use face-to-face and those that don’t

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… but is it too early to proclaim the death of face-to-face?

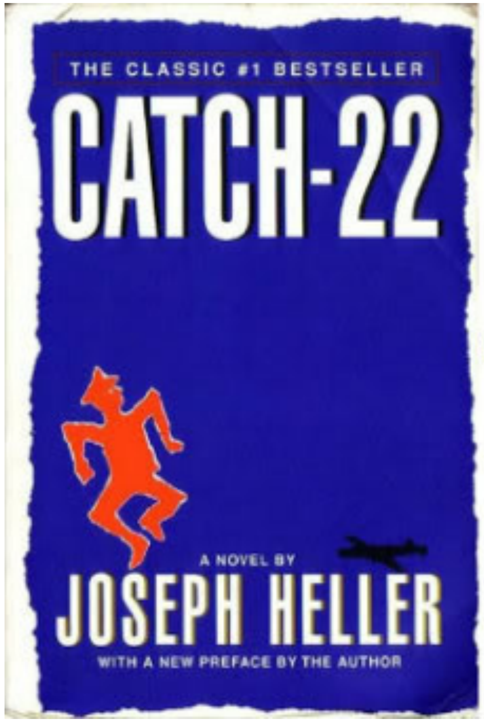
- Some groups hard to reach by any other means
- Still seen as the ‘gold standard’ due to the quality of sampling frame and measurable response rates
- Home technology ’audit’ useful for Establishment Surveys
- Depends on phone and internet penetration – unlikely to move from face-to-face in India for next decade, for example

So.... eight predictions

1: From contingency planning to a major focus on resiliency planning

- Clients will want reassurance that further outbreaks or disruption can be dealt with
- This is unlikely to be a one-off crisis

2: An increased demand for innovation but even less funding



- The crisis has accelerated people's use of - and reliance on - digital media: streaming, use of other devices…
- The currencies have been expanding to encompass this in recent years, but this requires significant and (up to now at least) disproportionate investment…
- …and the pandemic crisis will inevitably be followed by an economic crisis that will hit ad-funded media particularly hard…
- …and they hold the purse strings for media measurement

3: Face-to-face will continue but only as an absolute last resort

- Mixed mode – shift from face-to-face as lead approach…
- …to using telephone/internet first and then f-to-f used to reach groups that really can't be reached any other way
- At the very least, surveys that continue to use face-to-face will need a 'Plan B'

4. Greater use of (online) panels with less immediate need for fresh sample…

5. Hybrid systems with more inbuilt redundancy

6: The crisis will accelerate sharing of data collection tools across currencies

- Shared sources of sample, shared Establishment Surveys
- Synergies across currencies
- Greater collaboration between research companies was already increasingly in evidence

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7: Organisational change and concentration of currency bodies

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8. Above all, we will need to build on the innovation that this crisis has necessitated..

- Budgets will fall, but new (forced) learnings may help us work smarter to mitigate some of the risks
- A change in the balance between home and office working
- More sharing and efficient use of data collection vehicles
- The crisis will enable us to challenge some of the ‘sacred cows’
- ‘Necessity is the mother of invention’

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Get in touch

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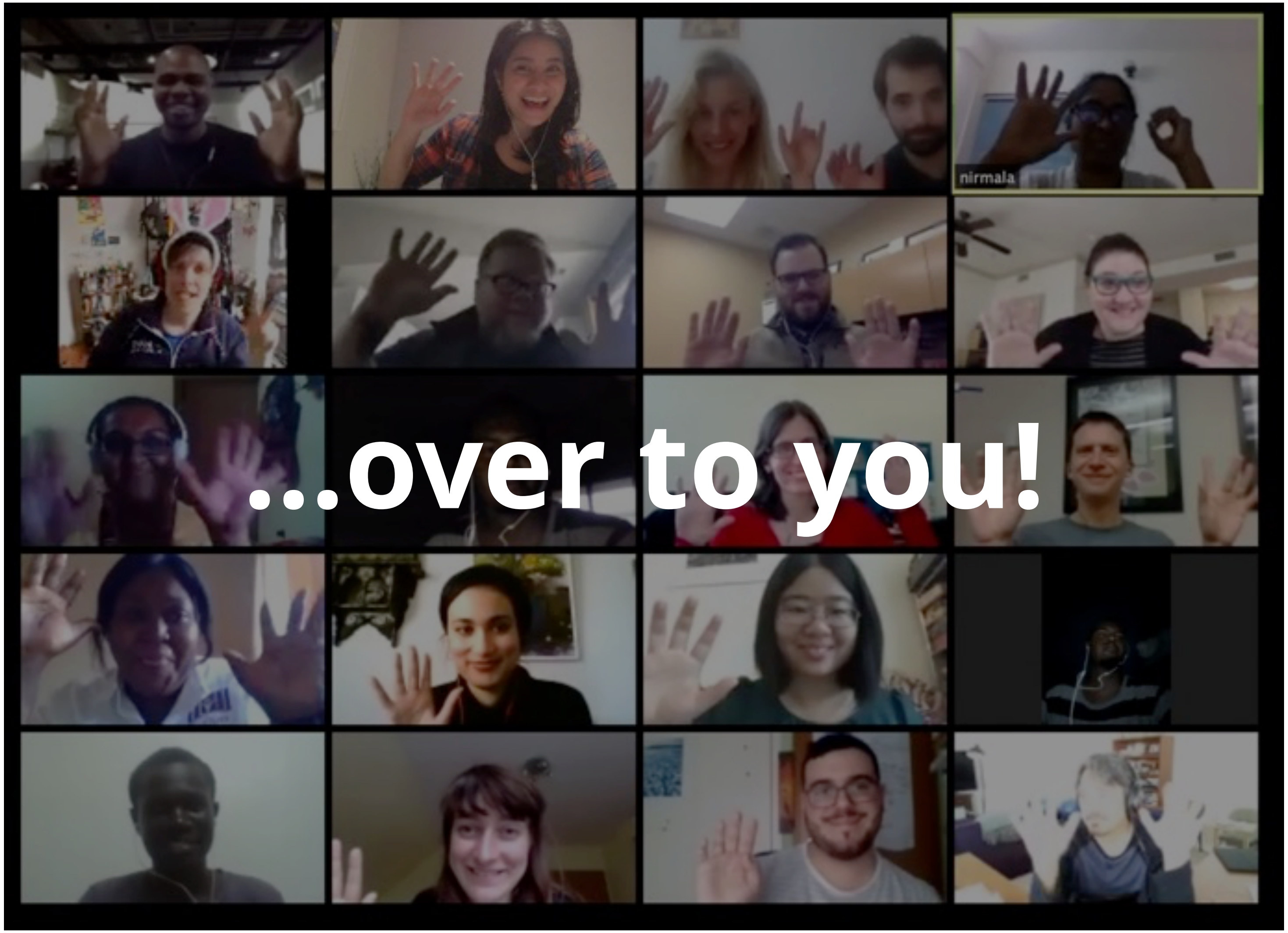

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