

THE COMPLEX WORLD OF CROSS PLATFORM MEASUREMENT

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Background

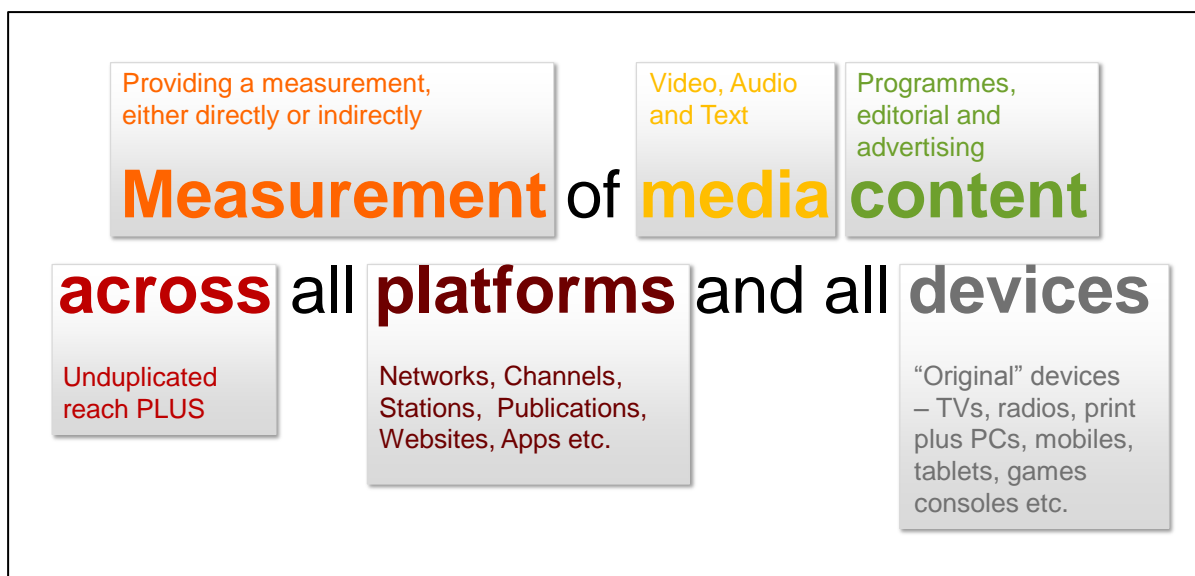
With the rapid growth in adoption and use of new platforms for accessing media content, the media researcher's task is undergoing radical change - moving from single medium audience measurement to adoption, adaption and integration of a range of different techniques.

This issue faces all media – but may be more acute in the publishing world with the ever-increasing need to generate new digital revenues.

This paper addresses the needs – and some of the solutions in play – for delivering cross-platform media measurement.

Mapping the territory

This is what clients tell us they want – across all media:



The scope of the task that faces us may look simple, but what does it actually mean:

Measurement – Much of the new media content distribution is having marginal impact now (less than 2% of UK TV viewing, for example, takes place on devices other than TV sets). This means that current panel and survey sample sizes are unlikely to be able to produce useable data. So we will need to be able to provide data that combines direct and indirect measurement.

Media Content - We still refer to TV, radio, press, internet – and even mobile – as separate Media. But boundaries between them are disappearing, particularly in the publishing world, where text is no longer the only means of communication. We need solutions for measuring content type, regardless of where it comes from.

Across – At the minimum, we want to measure or calculate unduplicated reach but what other common metrics do we need to create/develop for the new cross-platform planning world – time spent, engagement, impressions?

Platform – When we use the word platform, we're referring to the delivery channel for media content (media owner means of distribution). Measurement has always been designed with each of these separate platforms in mind. Now we need to link them together.

Device – The other side of the equation (the consumer-owned means of reception) and the list that will keep growing and keep presenting new challenges. They all need different measurement solutions (often multiple versions for each device) and these solutions need frequent updating to accommodate software updates, accessibility issues and consumer resistance.

How do we get there?

We should not underestimate the complexity of this task. We will need to develop tools for ALL combinations of media content/platform/device - and we will need to learn a new metrics language.

But there is a simple way of describing how we get to this cross-platform goal. We believe there are essentially two alternative routes:

- **Currency extension**
This is all about following the consumer to new platforms and devices. In essence, a single source addition of new platforms and devices to passive or survey measurement. In TV measurement, this might include the addition of web TV meters to a TV panel; in print, it's more likely to involve the inclusion of new cross-platform questions to a readership survey.

This makes a lot of sense, but does it put too much pressure on traditional currencies? Are panels big enough? Aren't questionnaires too long already? Are the demands on respondents' memories unrealistic? Are some things actually impossible to measure at the individuals level?
- **Currency expansion**
If the answer to any of those questions is YES, then we need to look at expanding the value of the currency by linking it to other data sets.

In print audience measurement research, both of the routes are being taken (and in a few cases, neither) so the next section looks at current cross-platform practice around the world.

Who's doing what?

At the 2011 Print and Digital Research Forum, a number of presentations attempted to address the thorny question of how to measure readership/use of new means of accessing newspaper and magazine content, alongside measurement of the printed copies.

Within the *currency extension* category, two alternative approaches were covered:

- The traditional approach (start with print and treat other platforms as secondary)
- The brand first approach (print and digital platforms treated equally)

Within the *currency expansion* category, we heard about:

- The fusion approach (recall approach for print but fused with behavioural data for digital)

These all have their strengths and weaknesses – and their supporters – but, at Kantar Media, we felt it was time to take a step backwards to look in detail at all the approaches in use around the world, and then to arrive at evidence-based recommendations for future cross-platform deployments in the 23 readership currency surveys we're involved in around the world.

We looked at existing Kantar services, and some competitive offers but most of the examples we cite below are all from Kantar. What we do differs from market to market (as we would expect), but we cover quite a wide range of approaches. So there is a continuum between *traditional* and *brand first*, rather than an either/or – and it's clear from the approaches described here that there is a very difficult balance to strike between keeping the questionnaire short (and costs low) and increasing coverage of readership across platforms.

Here are some examples – from one end of the continuum to the other – and many of these have moved quite far along the continuum since we started the audit. Those that have moved the furthest are those with highest penetration and use of digital devices. For many markets around the world, the printed brand is still very strong and not under significant threat from new ways of accessing it.

Currency Extension

Print only

This approach – in use for the NRS in Hungary, for example, makes no mention of digital versions of newspapers or magazines and asks about *titles* or *newspapers* and *magazines* rather than about *printed* versions. This approach has been described as intentionally vague and it has the advantage of maximising print readership and the disadvantage of not providing any measurement or strategic insight into the new platforms.

Print only but print defined

A variation of this approach is to ask only about the printed paper but to make clear that the question only refers to printed versions.

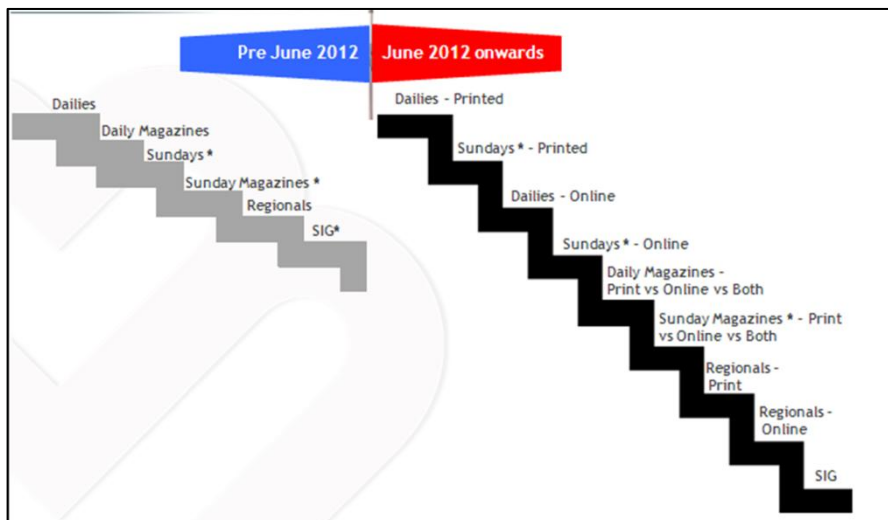
Print primary/digital secondary (all platforms OR all devices - generic)

Next we have two examples of NRS surveys that do cover digital platforms but only at a generic (not brand) level. In Canada, the newspaper currency, NADbank, asks first about printed newspapers and this is followed by a recency question on accessing content in other ways (websites, apps, PDF). This gives Canada cross-platform analysis.

In China, hardcopy and digital newspaper questions are asked separately. For the printed version, respondents are screened first for readership of a “newspaper” in the last 12 months. Once past that generic filter, there is a title specific 12 month filter, followed by recency, frequency and quality of reading questions. Digital newspaper questions are asked generically – recency and frequency of accessing digital newspaper content on desktops/laptops, tablets/e-readers or mobile phones/PDAs. This gives China cross-device analysis.

Print primary/digital secondary (all platforms by title)

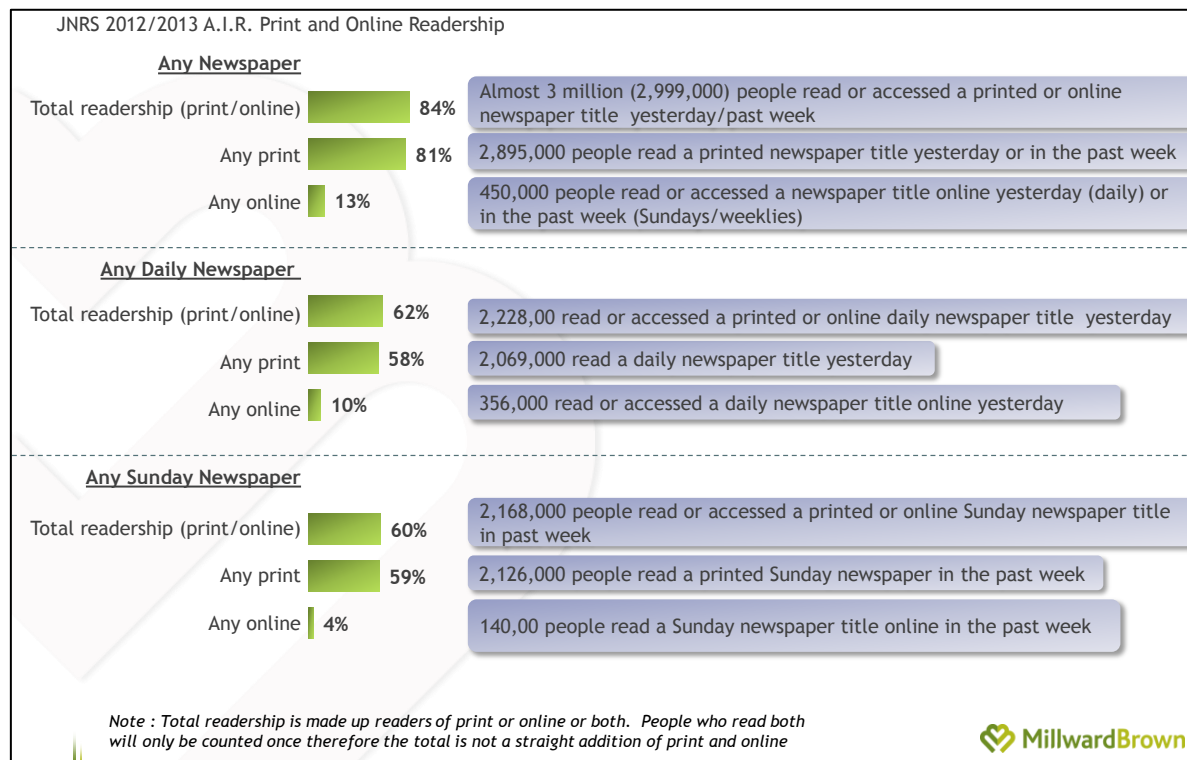
The JNRS in Ireland has moved from a Print Only position in 2011 to the launch in August 2013 of full cross-platform measurement by title. A new questionnaire sequence was introduced...



And new digital questions ...

- Q. First of all, I'd like to go through ... the titles of **printed** newspapers ... please don't count any you have read **online**.
- Q. This shows you all the ways you can read or look at newspaper content online .. (Prompt showing all means of accessing newspapers online – **directly** via a newspaper website or **indirectly** through links posted on other sites such as Facebook or Twitter, or through newspaper apps on your mobile device, or looking at an electronic replica of the printed newspaper that a subscription is paid for).

So the JNRS is now producing total AIR across platform, with online access to dailies contributing an additional 4% reach..



Print primary/digital secondary (within title)

All of the above examples ask all print/printed questions, followed by all digital questions. In our next examples, print and digital questions are asked within title.

The new Belgian NRS is designed to deliver combined reach of print and digital across platform. It starts with screening out those who have not read any digital version of any publication at all over the last months, then uses a double screening/filter question for each title. Then printed paper questions are asked of printed paper readers and digital questions are addressed to digital readers.

Recency and frequency questions are asked for a mix of platforms and devices – i.e. digital editions/PDFs; website through PC; website through smartphone; website through tablet; app through smartphone and app through tablet. Title by title data is published for:

- Paper Only
- Paper + Digital Versions (this is app + pdf)
- 'Brand' (Paper + Digital Versions + Site).

In Denmark, the NRS currently introduces the interview with a statement that “it will concern printed papers” and then runs print and digital questions within title.

Once screened, print recent readers are asked whether they read that daily title (for example) ‘yesterday’ (recency period) in print only, online only or both print and online. (The “only online” are then removed from the recency calculation).

Publisher websites are included in the accompanying self-completion questionnaire – with a frequency question. Results are then calibrated for weekly reach to match the internet currency. Other platforms (PDF and apps) are currently too small to measure.

Both of the above – though quite far along the continuum – are still close to the print first approach. But our colleagues at TNS Denmark have tested a print first v brand first methodology. This (and the new Belgian NRS) are covered in more detail in separate papers at PDRF 2013.

Next we look at some examples of the other main route to a truly cross-platform measurement.

Currency Expansion

This area too has a continuum – and its own complexities – but essentially we’re talking about linking two sets of data together, rather than delivering a single-source solution. The key requirement here is the presence of some form of single-source hub that can provide data on duplication across platforms to enable net reach calculations.

Currency to currency fusion

This is much more prevalent now. It involves fusing the national readership survey and the national internet currency (or its equivalent) – taking print data from the former and website use data from the latter. It will usually require the presence of three separate elements:

- Readership survey must specify printed papers only
- Readership survey collects claimed website use – for demographics and for calibration to website census data OR internet currency is a hybrid with its own user-centric panel that can fulfil the same tasks.
- Publisher websites need to be tagged

Among markets using this technique are Russia (TNS Gallup) UK (NRS PADD), Australia (EMMA) and Canada (PMB/comScore).

The limitation on this approach is that you can only provide measurement for what the internet currency measures, so some platforms – like apps and PDFs – may be excluded.

Hybrid - linking multiple behavioural streams

Here, some markets are closing the gaps by incorporating data from other streams (e.g. mobile provider data) into survey/internet data. This is an approach adopted by Norway – and requires significant modelling expertise to fill data gaps and understanding relationships between different platforms.

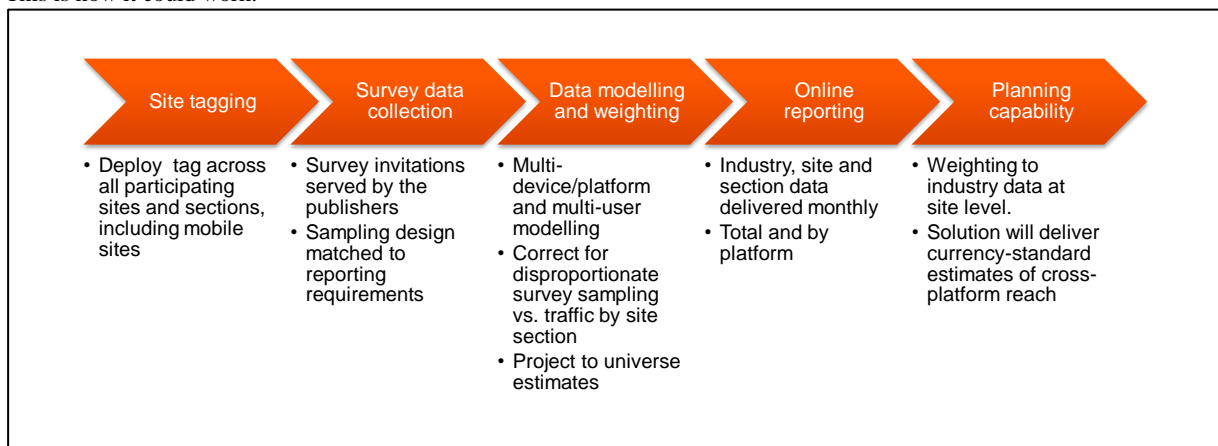
This will be covered in a separate PDRF paper.

A web-first approach

The future, perhaps? When digital platform use outstrips printed use?

This is based on the assumption that the web (including mobile web) is the starting point – and the place where use of printed platforms is created or modelled.

This is how it could work:



What does this imply?

We assume that as time goes on, more print audience measurement will move over to the hybrid (Currency Expansion) mode – integrating survey and behavioural data.

What does this mean for the way we think about, plan and produce readership data?

- There will be a greater role for data integration and modelling. So we need to get over our aversion to fusion in all its forms. We'll also need to invest in the skills to do it well.
- We will need faster and more frequent data publication as digital access grows. That means automating systems and investing in databases, interfaces and analytic tools that are able to deal with large volumes of data and dynamic data integration.
- We need an industry debate on common metrics across platforms and devices. That may mean losing some of our current (sacred?) metrics like AIR – in favour of reach, time, GRPs?
- We also need agreed standards on the quality of the “big data” we use.
- And finally, but this may be more challenging than any other requirement – we need increased collaboration between industry currencies. We will still need some form of robust single-source, single medium currencies – if only to act as hubs for the integration with behavioural data – but as media boundaries dissolve even further it will be important for all currencies to work together to avoid duplication – and gaps!