

SUPER PANEL: A MULTI-SCREEN AUDIENCE MEASUREMENT

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Background

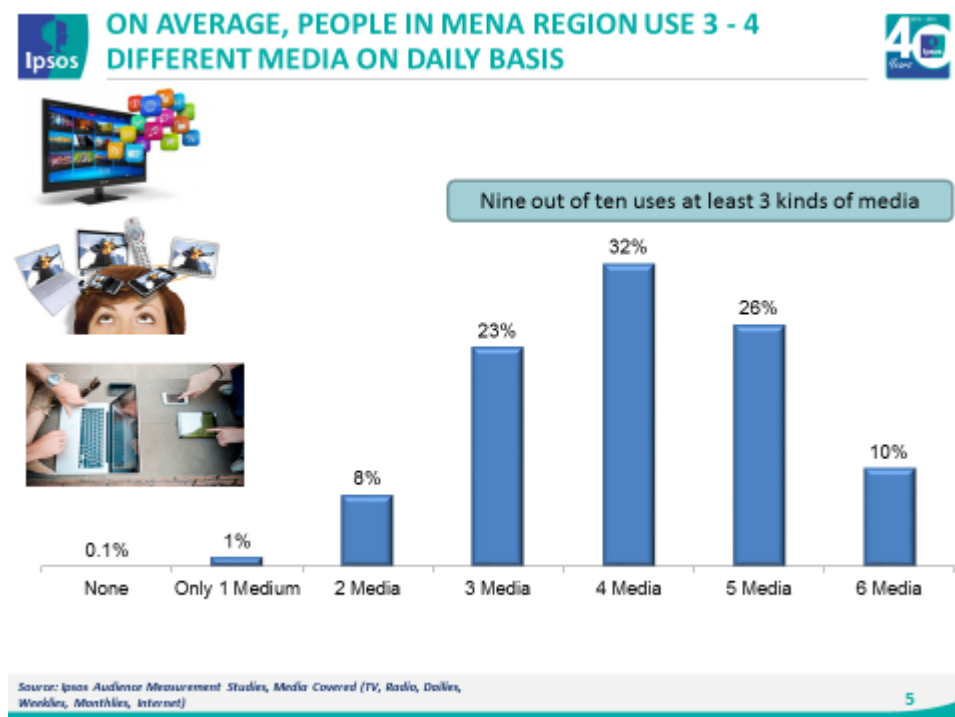
The ever growing appetite of today's content-hungry consumer, accompanied with the evolution of digital devices, has resulted in a change in media consumption habits. Consumers are no longer satisfied with the use of one device to meet their media demands or desires. A typical day of a consumer may start with checking social media applications on a smartphone screen. This may be followed by watching a morning show on a television screen as he or she is having breakfast, whilst also checking the news on a laptop or tablet. As the day progresses, he or she may switch between devices seamlessly – sometimes using more than one device simultaneously for related or unrelated activities – depending on the context of the moment. The following outlines the implications of these changes in media consumption habits:

- An overlap in the media content which is consumed on different devices
- The diffusion of consumers' attention amongst different media platforms
- Reduced likelihood of recalling content consumed on the increased number of platforms used – i.e. existing audience measurement tools may fall short of fully capturing media consumption habits

Currently, different sources exist for the audience measurement of TV, mobile and desktop separately. However, there is no single source of measuring multi-screen usage in the MENA region.

Challenges of Existing Audience Measurement Approaches

As researchers, the challenge lies in delivering a comprehensive understanding of media consumption across different platforms to our clients – and tackling the measurement challenges of certain platforms. A significant part of this challenge is the increased use of different media.



Given the continuous use of technology, how can such media interactions, which seem to be occupying a significant chunk of everyone's daily lives, be captured and measured accurately and effectively? Existing approaches effectively measure audiences of each media platform independently. However, such approaches face a number of challenges:

- Asking consumers about their media consumption habits on each platform is time consuming
- It is often difficult for consumers to fully recall their media consumption due to its sheer size and frequency
- Since consumers use media platforms continuously at different times of the day/ night and for lengthy periods of time, media monitoring needs to be constant but not disruptive
- Media consumption across and within platforms often overlaps; for example, a consumer can be streaming a video on his/ her laptop while simultaneously accessing different websites

Today's Measurement Approaches

Currently audience measurement is done through one single platform at a time, i.e. we are able to measure TV viewership, Mobile screen viewership, and Desktop screen viewership separately:

1. TV is being measured through the day after recall approach using the CATI methodology; we are purely relying on the memory of the viewers to be able to recall the channels they have watched yesterday.
2. Radio listenership is being measured in a similar way; respondents are contacted through telephone and asked about their yesterday's listenership using the day after recall approach via CATI.
3. As for mobile/tablet and Desktop/laptop audience measurement, these are being measured through two different sources which revolve around the recruitment of two panels. One source involves the installation of an application for mobile and tablet users who then become part of a panel. On the other hand, and in a similar approach, a software is installed for desktop/laptop panelists whose Internet usage is then measured.

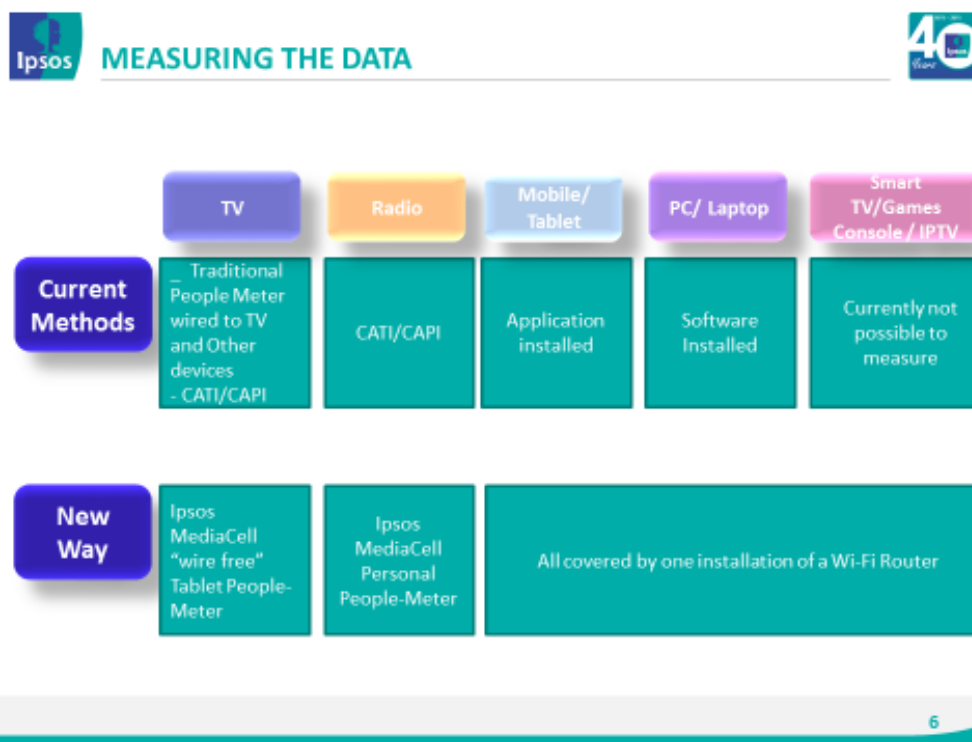
So, we end up having four different data sources, without being able to identify multi-screen usage and without being able to identify the link between different devices - there is an absence of a link between the three screens, and at best, we are only able to fuse the data of the different sources.

Thus, Ipsos proposes an approach which will tap into the digital lives of consumers without disrupting their day to day lives via actively asking questions about their media habits.

Introducing an Ongoing and Dynamic Audience Measurement Approach

Since today's media experience appears to be an ongoing and dynamic experience, Ipsos is introducing a media measurement approach which is also just that – ongoing and dynamic. Upon introducing a new approach, it is important to keep in mind that today's content-hungry consumer also values his or her time. Thus, this approach aims to build a Super Panel for the purpose of multi-screen audience measurement along with Radio listenership whilst demanding minimal input from Panel Members.

By installing simple and easy equipment in the homes of volunteering panel members (with their consent), multi-screen audience measurement along with radio listenership are enabled in a passive manner.



Devices to be installed include the Ipsos MediaCell “wire free” Tablet People-Meter (for measuring TV data), Ipsos MediaCell Proprietary software (for measuring radio data), in addition to a Wifi Router (for measuring mobile, tablet, PC, laptop, Smart TV, Games Console, IPTV data). Additionally, applications may be installed on household members’ smart phones to measure out of home internet content consumption and to measure radio consumption.

MediaCell represents the future of electronic audience measurement. Developed over several years by Ipsos, it involves the downloading of a piece of software - effectively an app - onto users’ Smartphones (Radio). This app transforms the phones people keep with them virtually 24 hours a day into powerful audience measurement devices. The system works by detecting inaudible codes inserted into the audio streams of any medium – principally radio, television and the internet. When people hear the sounds, their Smartphones automatically capture the time, date, place and source of their listening. Respondents taking part are not required to do anything special other than carry their mobile phones, keep them charged and keep them connected. To behave, in short, as they normally do.

The MediaCell Tablet Meter is used to monitor TV viewership. It is linked to TV sets without any physical connections and has been fully designed and developed by Ipsos for the purpose of this new audience measurement approach. The device identifies the viewership of channels using two methods:

1. Digitally encoded broadcasts with an inaudible watermark giving an extremely high level of accuracy across all platforms
2. Industry Standard Audio Matching technology provides minute by minute reporting with a wide range of referenced channels

In other words, MediaCell Tablet Meter is a passive measurement for the TV; where the broadcast content is encoded at source, the MediaCell TV tablet detects set activity and viewing, data is transferred via wifi to Ipsos servers, then MediaCell production system checks compliance and validates data received; after which the data is weighted, processed and delivered to the market.

The Wifi router provided to panels by Ipsos will replace any previously installed routers in households and will be used as a main internet connection. The modified router will be connected to devices which are linked to the Internet, and which are individually recognized using a unique MAC address. Data will be collected from all connected devices; this will include the logging of all URL addresses, videos consumed, internet traffic on Smart TVs and YouTube views. New devices can easily be added. This modified Wifi router offers future proof for IPTV services and IP-VOD services. Once it is installed, no input is required from Panel Members – which eliminates any errors which may be present in more traditional methods where participants are asked to recall their online activity.

Each of these devices can be easily installed and will be provided by Ipsos for the panelists. Once installed, the consumption of the respective media platforms is logged and collected electronically – for example, TV channels/ programs viewed, URL addresses accessed, video consumption on all connected devices, Smart TV internet traffic, YouTube views via Smart TV, etc. Throughout this process, transparency with panel members is key to ensure mutual trust between a dedicated Panel Team and Panel Members.



This intriguing new approach is ideal for measuring the intriguing new digital lives of today’s consumers. As our lives evolve, so too do our measurement approaches. Thus, such an approach will ensure that we have a complete and non-intrusive understanding of the ever growing appetite of today’s content-hungry consumer.



Panel Selection

Using Ipsos’ team of panel experts, volunteer households across the UAE who agree to take part in this ongoing research study will be selected. Different households will typically have different compositions; different number of members and different distribution of demographics such as age structure and gender.

Recruiting panel members could be challenging. However, Ipsos is investing heavily in a dedicated Panel Team who will handle the process of recruiting and managing Panel Members from start to finish. Upon recruiting, the Panel Team will be very clear with Panel Members about why Ipsos is conducting this study and all members will be fully aware of all information gathered. The consent of members is crucial in order to proceed. Moreover, members will be offered an

incentive for their participation – an incentive which is substantial enough to encourage them to join the panel but without influencing their behavior in any way.

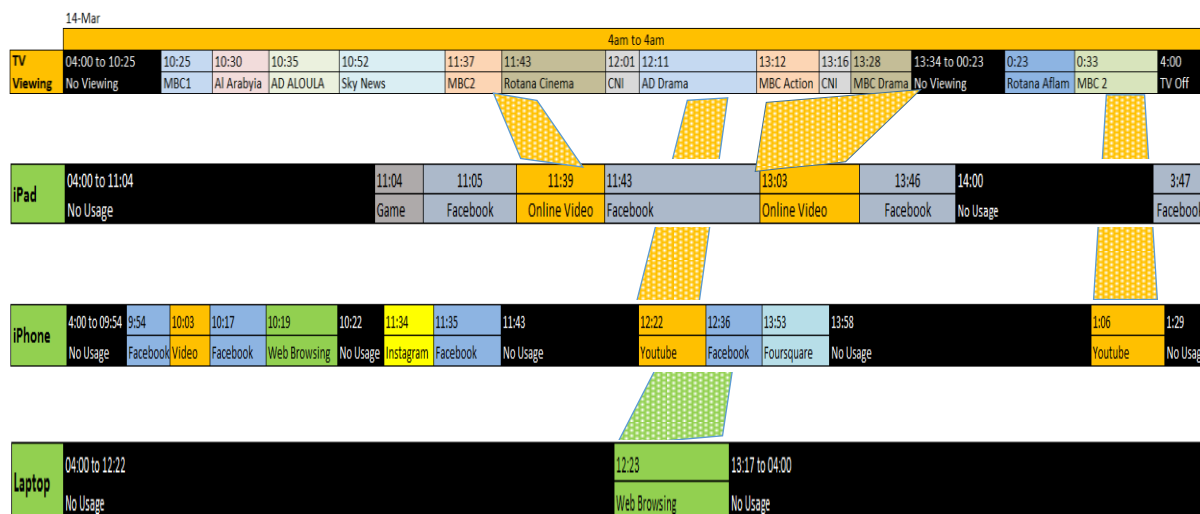
Households with more than one member will typically exhibit different media consumption behavior. It is important to capture these differences on shared devices such as TV sets; for example, a father in a household may be watching the news on TV in the early hours of the morning, his wife may be watching a movie in the afternoon, and their daughter may be watching cartoons on the same TV in the evening. Thus Ipsos has taken into account that such differences may exist, and to ensure increased reliability and accuracy of results, a Bluetooth remote control will be provided to allow each family household member and guests to register each viewing session with the touch of a button.

Panel Management Software

A customized panel management software will be used to track compliance of every household in the panel on a daily basis. Close monitoring of panel households will ensure that any issues related to the devices or panel members’ use of the devices are tackled immediately and will improve the quality of results.

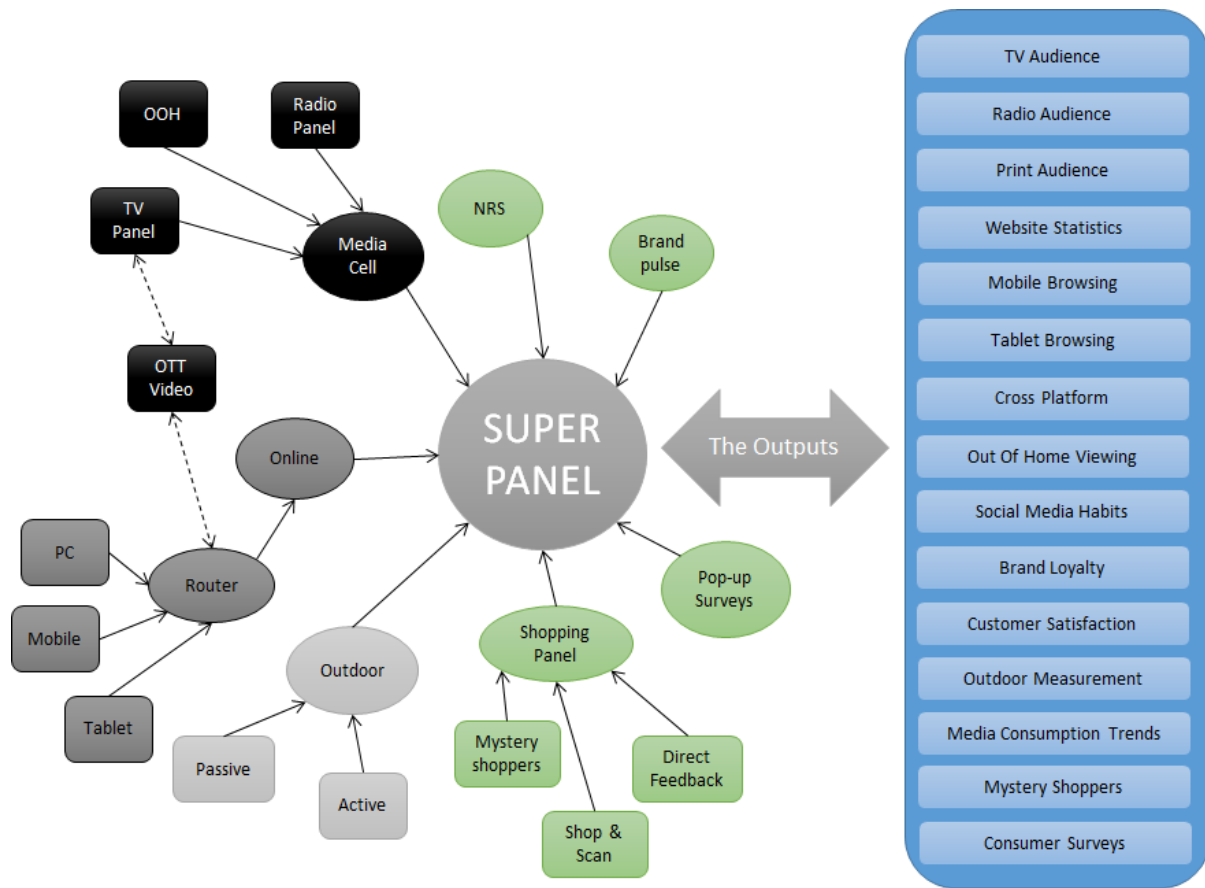
Multiscreen Pilot Test

In order to evaluate the abovementioned approach and assess the type of data that can be captured through the use of passive measurement techniques, a pilot test consisting of several households in the UAE was conducted. An example of the data captured from monitoring one person’s media consumption is shown below. The MediaCell Tablet Meter was installed in addition to a modified Wifi router which tracked internet activity on an iPhone, iPad and laptop. The below highlights simultaneous use of media devices; for example, whilst watching TV at 11:43, the iPad was also being used to access the Internet. Thus, such an approach provides valuable information regarding the combination of platforms being used at any given time - information which is valuable to advertisers and media planners.



The Future of the Super Panel

As consumers’ media consumption continues to evolve, the super panel will also evolve. As additional tools are added to our media usage sphere, they will be integrated into the super panel. Ultimately, this means that one source can be used to provide clients with a comprehensive range of outputs as shown below.



Conclusion

Even though the deployment of fusion analysis and interpretation of big data is currently trending in the research and marketing industry, it will remain based on estimation and the margin of error will still have an impact on the results. Media consumption behavior is changing faster than before mainly with the development of digital applications and platforms.

MediaCell is the response to the paradigm shift in audience measurement; consumers are never without their mobile phone. It has become the key tool to analyze consumer behavior on digital platforms and in “real life”. As audience measurement has entered a new era, the MediaCell technology developed by Ipsos is a breakthrough technology. The consumer is no longer passive on media – he/she is part of the media, and by implementing the super panel approach, marketers can understand how their consumers are engaging while delivering their message at the same time.