

# Measuring Multimedia Audiences: A Respondent-Friendly Approach for the Digital Age

José Andrés Gabardo, Technical Director, AIMC

Toni Seijo, Director of Ipsos Connect Spain, IPSOS

## Abstract

In recent years the Asociación para la Investigación de Medios de Comunicación (AIMC) has carried out a number of tests to assess the viability of migrating the EGM multimedia survey from its current face-to-face methodology to a self-administered, online methodology. But these tests have not succeeded in generating credible audience data. Nevertheless, AIMC has a new mandate from its stakeholders to evaluate the possibility of transferring part of the EGM offline sample to online and Ipsos has been awarded the project to pilot this initiative with two main objectives:

- To deliver credible/comparable audience data from the connected population
- To generate cost savings

There are multiple challenges to overcome. 80% of EGM's current interviews exceed the maximum recommended length for questionnaires to be answered on a laptop; it is far worse for those using mobile devices. Moreover, the EGM questionnaire includes some repetitive and complex questions not easy to answer without interviewer support.

This paper describes how we have developed a digital questionnaire divided into sections. This allows respondents to answer it from any device at different times of day (e.g. - when a section is complete, respondents return to the initial menu where the section already completed has disappeared and just pending ones are shown). We have also introduced different layout design improvements to ensure that respondents answer with attention (e.g. speeders, straight liners ...). And the paper also includes response rate data and gives some tips about how to deal with lengthy questionnaires in mobile first media projects.

## General background

AIMC is one of the best examples of the system that all International organisations recommend as the Gold Standard for managing audience research: one that comprises all the entities involved in the sector in charge, making it responsive to their needs, ensuring transparency and equal access to data hence facilitating general acceptance of the results (the famous JIC, "joint industry committee"). Therefore, AIMC is formed by a core group of companies whose corporate activity revolves around communications, both at Commercial and Communications level. Their connection derives from a common interest which is to become deeply acquainted with the media consumption in Spain.

AIMC hosts all the current media without exception and from the beginning it has sought to address the specific needs of each. For this reason, the Association carries out studies and research into different media, in the quest to get a complete picture of the Spanish media landscape. In this sense, the EGM multimedia survey is the backbone of AIMC activity and one of the two most important establishment media surveys in Spain.

In recent years, AIMC has actively taken part in research on specific sectors such as newspapers, radio, local television and cinema and has pioneered internet media measurement in Spain. In 1996, AIMC began providing the first measurement data pertaining to Internet audiences and in the same year conducted the first survey on Internet users. The latter, which has been repeated several times, is so far the main source of knowledge for the Internet community in Spain. It is worth mentioning as well the agreement signed with IAB Spain in 2007 to achieve consensus in the market with an Internet measurement system to improve the current situation.

After decades of delivering accurate and reliable data for advertisers, agencies and media houses, the EGM multimedia platform, currently conducted via door to door interviews, has been challenged by several disruptive factors. On the one hand, respondents are less and less willing to open their doors to interviewers and take part in face to face surveys. On the other, it is increasingly harder to find at home certain demographic groups, because they are out most of the day. Specifically, young people are often highly mobile and are increasingly reluctant to answer long questionnaires, even less offline.

In addition, Spain has one of the highest smartphone penetration levels in the world and for many in the sector it sounds outdated that this device is not used to get at least part of the answers via Internet. But consumers and technology are not

the only disruptive factors; there are other changes coming from the media sector itself. Higher audience fragmentation and more frequent touchpoints interaction of the consumers are pushing media planners to demand greater granularity from EGM reports. For example, as is well known, the digital revolution is dramatically affecting the way people read newspapers or listen to the radio, among others, which adds a lot of complexity to media strategy decision making. For this reason, audience research is required to be more accurate and granular than ever, putting a lot of pressure on the AIMC side.

## **EGM overview**

Estudio General de Medios (EGM) was the cornerstone of what is currently AIMC and still remains as its most ambitious study. Through 30.000 personal “face to face” interviews annually, distributed in three phases, with results reported in April, July and December, EGM depicts a rich and comprehensive snapshot of media consumption at local and regional levels. Since 2003, all interviews have been conducted under a CAPI system using laptops of the tablet type.

In the late 2004 EGM expanded the sample with telephone interviews (CATI) throughout Spain for measuring Radio audiences in greater depth. EGM has now expanded to a sample of 50,000 telephone interviews for radio to achieve 80,000 per year in total.

Subsequently, other media also began their own single media sampling expansion with similar characteristics to radio. Newspapers (EGM Prensa, since 2006) has added 45,000 telephone interviews to the 30,000 core Multi-Media interviews, summing to 75,000 interviews annually. Magazines (EGM Revistas, beginning in 2008) adds 20,000 personal interviews, achieving in this sense a total of 50,000 interviews per year for this media. And TV (EGM Television, in late 2008) increased sampling by 13,000 telephone interviews, which jointly represents 43,000 annual interviews. Finally, it should be noted that EGM has been positioned as the indisputable establishment survey in the Spanish market, being used to balance the peplemeter sample.

## **Previous experience with trying to change methods**

During recent years AIMC has made several unsuccessful attempts to introduce a third type of interview, besides F2F and telephone, into the EGM ecosystem. In 2005 the association made the first attempt to integrate Internet into the survey. The results were not good. AIMC repeated the experience in 2010-11 and got similar disappointing results. In both cases the association found problems obtaining an accurate representation of the Internet universe.

In 2013 AIMC began to build up its own Internet Access Panel named AIMC Q Panel. The participants in the EGM interview were offered a chance to take part later in this new survey panel. This way it was possible to recruit members for the online panel using traditional interview systems (F2F and phone) in a very inexpensive way. AIMC used this panel to test different elements of the survey: questions, incentives, models, etc. However, the same problem persisted: the penetration of the media was always higher in the Internet survey than in the offline one.

In 2016 AIMC made another online test with the magazine survey (EGM Revistas) this time using two different methodologies:

Option 1: Using an access panel (sample 1.500 interviews)

Option 2: Using random dialling recruitment through the phone (sample 2.000 interviews)

This time the new attempt worked out better. Despite Option 1 results (using an access panel) remaining much higher than the reference ones (e.g.- magazines incidence was 20 percentage points higher than the F2F one among the target “people accessing Internet”), Option 2 results (using telephone recruitment) were much closer than the offline ones (only 4 pp higher among connected people). This encouraged AIMC to keep moving in this direction but this time experimenting with the big one, the EGM multimedia survey.

## **The new study**

In the second half of 2016 AIMC received a new mandate from its associates to assess the feasibility of transferring part of the EGM multimedia offline sample online. A tender was launched and Ipsos was awarded the project to pilot this initiative.

### Goals & challenges

For this test were settled the following objectives:

- To deliver credible/comparable audience data from the connected population
- To generate cost savings

Although both were important, covering even more faithfully the changing media landscape was by far the main one. So quality was prioritised over potential savings.

As said, migrating sample online demanded that we overcame several difficult challenges. On the one hand, the offline questionnaire length is longer than 40 minutes for 4 in 10 EGM respondents - likely too long to be answered online via mobile. On the other hand, some EGM questions seem too complex to be answered using a self-administered questionnaire, that is, without interviewer support, and therefore can generate boredom and survey abandonment. Finally, people open to answer an online questionnaire could be heavier Internet users than the average connected person and thus have different media consumption patterns. To the extent that offline interviews are going to be replaced by online ones, this effect could affect audience results in a significant way.

Of them all, the excessive questionnaire length (with an average duration of 32 minutes offline), was perhaps the biggest challenge the online version had to deal with, due the high levels of drop out it can generate. As is known, the more media consumed the longer the questionnaire. 80% of the EGM multimedia offline interviews exceed the maximum recommended duration for online studies and 40% are longer than 40 minutes (see the table below). Based on Ipsos's previous experience, dropout levels on long online interviews can vary between 20 and 50%, highly depending on the questionnaire layout. Of course, respondent fatigue can also affect the quality of the answers. Therefore questionnaire length affects both the comparability and the costs of the study.

<i>EGM F2F questionnaire length till -minutes-</i>	<i>% interviews</i>
0:24:26	20%
0:29:36	20%
0:35:00	20%
0:43:38	20%
+44	20%

### Methods of recruitment

Three different methods of sample recruitment were considered for this test: CATI, ONLINE PANEL and DOOR TO DOOR. The first one gets fresh sample through random phone calls to mobile numbers only, contacted people that agree to participate receive the questionnaire link by email. The second one uses panellists from a large pre-recruited online panel owned by Ipsos. The third one takes advantage of the many 'door to door' visits done by the EGM interviewers; when the contacted person is not valid or rejects to be interviewed an invitation card with the questionnaire link is left behind. This way who rejects to be interviewed in person at the time have the opportunity to answer online in other moment or other family members can also do it later on as well.



*Invitation card layout left behind after rejection*

### First piloting exercise

In order to check feasibility and key assumptions before full launch Ipsos proposed to pilot the new questionnaire layout and incentives as well. The pilot was conducted for CATI and D2D recruitment methods only; the online panel alternative was not considered for this first pilot. Other purposes were also to evaluate the financial feasibility of the initiative (ideally online CPI should be lower than offline one) and to find out the optimal combination of the three sample sources. For this pilot Ipsos conducted 1,000 interviews among connected people recruited by random mobile dialling only. Ipsos also handed out 2,300 invitation cards in 161 F2F interviewing routes.

For this pilot Ipsos also programmed a first questionnaire link with only a section of the current EGM questionnaire (TV viewing habits) of about 9 minutes' length. It was device agnostic, that is, respondents could answer it using any device: laptop, PC, smartphone or tablet.

Pilot results were somehow below expectations. Regarding CATI recruitment, 7% of contacted people agreed to participate and from these only 19% completed the online survey after having an abandonment ratio of 30%. About 43% of respondents completed the pilot questionnaire using their smartphone. Regarding the 'door to door' option, pilot results were even worse with a response rate lower than 1%. Offering to rejecters/non valid people the opportunity to answer via the Internet didn't work. Likely many of them weren't regular enough Internet users.

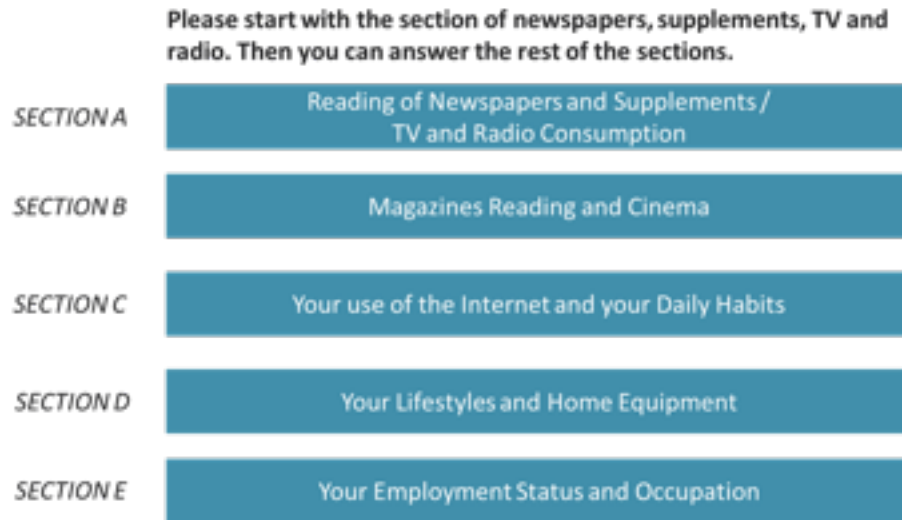
Despite all this, both pilot options seemed *a priori* feasible and some valuable learnings were obtained:

- Drop out rates could be reduced in a significant way by making the questionnaire layout even more visual and mobile friendly (one of the more bothersome sub-sections of the questionnaire, TV consumption by time slot, explained more than half of the total drop out).
- CATI recruitment response rates could be improved by sending the invitation link immediately after the respondent agrees to participate and by focusing on the more accessible target groups
- F2F recruitment response rates could be improved by redesigning the invitation card using more persuasive messages and by fine tuning the incentives system for both, interviewee and interviewer
- Hybrid sampling option, mixing the three different sample sources, seemed to be the more cost efficient alternative

### Questionnaire programming

Of all the challenges, the biggest was without doubt designing a questionnaire 100% adapted to the digital environment. For this purpose, Ipsos mobile survey experts developed a modular design able to split the whole EGM questionnaire into different media consumption sections. Thanks to this innovative approach, inspired in the work done for the British Media and Lifestyle survey, respondents can answer the long questionnaire block after block, accessing it from any device they want.

When the interviewees complete a section they return to the initial menu where the section already finished has disappeared. Each section lasts between 5 and 10 minutes and the incentive is awarded only at the end of the whole interview. Thanks to this new application the participant can access from any device enjoying a friendly experience in any case. This allow him to respond from where he feels more comfortable in a much more flexible way. The fact that respondents can pause and return later prevents us from having higher levels of drop out. Moreover, the application is able to monitor different quality indicators to ensure people respond with attention (e.g.- speeders, straightliners ...)



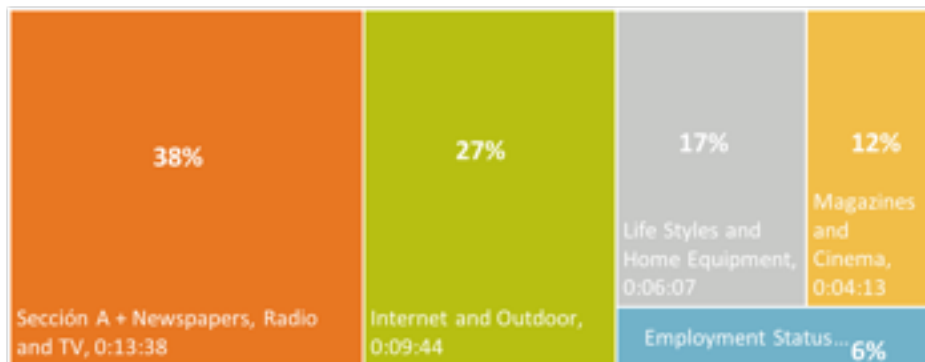
### Second piloting exercise

The optimal combination of questionnaire design and incentives was key to minimising survey abandonment and therefore to the final viability of the migration. For this reason, once the new questionnaire layout was ready and before fieldwork started, Ipsos tested 4 different alternatives with very limited samples (n=100 per cell) and for cost reasons using its online panel only. The four tested options were the following:

- CELL 1: Section A first plus flat incentive  
(the respondent only sees the menu after Section A is completed, there is no incentive in case of abandonment)
- CELL 2: Sections menu first plus flat incentive  
(the respondent sees the menu from the beginning although with indications to begin with section A, there is no incentive in case of abandonment)
- CELL 3: Section A first plus variable incentive  
(the respondent only sees the menu after Section A is completed, for having done it the person gets an additional incentive -to participate in a draw- although eventually abandons the survey)
- CELL 4: Sections menu first plus variable incentive  
(the respondent sees the menu from the beginning although with indications to begin with section A, for having completed it the person gets an additional incentive -to participate in a draw- although eventually abandons the survey)

When the second pilot was over the cell with the lowest abandonment ratio was number 2 (sections menu was shown before and the incentive was flat), the one with highest ratio was number 4 (sections menu was shown before and the incentive was variable). So for respondents the draw was not motivating enough even when given in addition.

Excluding postponements, the survey took about 32-35 minutes on average (45 in median) to complete across the four cells. Section A occupies almost 40% of the survey and consequently is the one that generates the most abandonment.



Finally, the evaluation of the questionnaire by respondents obtained a score of 8 on a scale from 1 to 10. Being able to answer the long questionnaire in sections that can be completed at different times, the dynamic flow of the interview and the mobile friendly design were the aspects best rated. As expected, the worse one was the excessive duration of the questionnaire.

All these results helped to fine tune the final test design.

In parallel, the ‘door to door’ invitation card was totally redesigned to be more engaging for potential participants. Clearer benefits and instructions should help to increase response rates.

**Ipsos** ¡TU OPINIÓN NOS IMPORTA!

Participa en nuestra encuesta sobre **hábitos de consumo de medios de comunicación** y conseguirás un cheque regalo de Amazon por valor de **5€**. Y además, podrás optar a **300€** participando en sorteos!

**CHEQUE REGALO DE 5€**

**amazon**

**PASOS A SEGUIR PARA PARTICIPAR EN LA ENCUESTA**  
Puedes hacerlo con tu **ORDENADOR, MÓVIL O TABLETA**

- 1 Introduce en tu navegador el siguiente link: [media.ipsosinteractiva.com](https://media.ipsosinteractiva.com)
- 2 Seguidamente introduce este código de identificación cuando te lo pida: [Axxx](#)
- 3 Refiere la encuesta cuando a tí te venga mejor, la puedes hacer por partes.
- 4 Una vez la hayas rellenado, recibirás un cheque regalo de 5€ Amazon vía email. Y además, entrarás a formar parte en un sorteo de 300€!!!

**GRACIAS POR TU PARTICIPACIÓN**

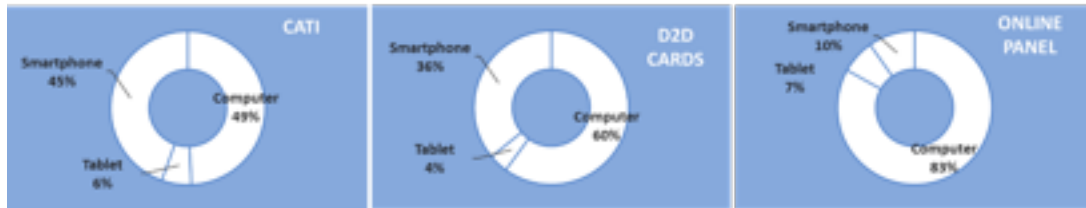
**GAME CHANGERS**

### Test full launch

The final test was planned for launch in parallel with the EGM multimedia second wave scheduled for April and May 2017. Based on the sample funnel rates obtained with previous pilot tests, Ipsos expected to gather about 2,000-2,100 completed interviews in total, split as follows:

- CATI: 1,000-1,200 interviews (from 6,000 phone contacts obtained with random dialling in addition to some phone re-contacts to numbers gathered in other AIMC surveys)
- Online panel: 600 interviews (from 3,000 contacts of the Ipsos panel)
- Personal: 200-300 interviews (from 11,000 cards handed out)

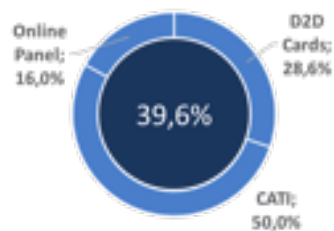
At the end of the test we obtained a total of 2,237 completed interviews, about 12% more than expected, answered using different devices.



*Device used to answer the online interview by recruitment method*

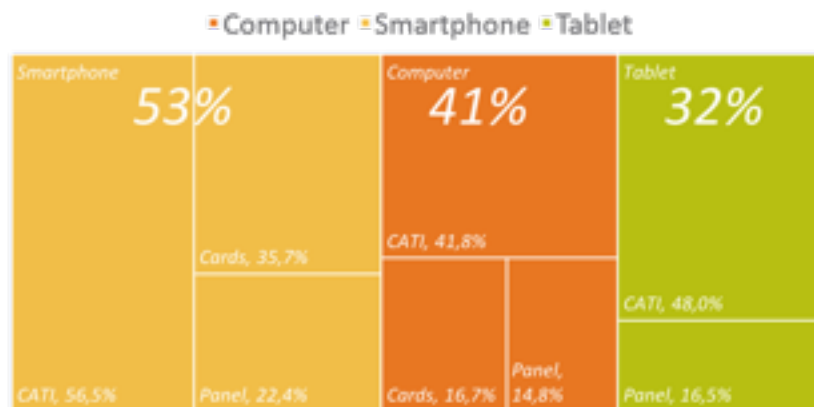
93% of respondents started and finished the survey during the same day, in spite of having made several pauses in between.

The overall abandonment rate was about 40%, with people recruited by CATI being the most likely to quit.



*Abandonment ratio per recruitment method*

Crossing the proportion of abandonments by the device used to respond to the questionnaire, we see that mobile is the one with the highest levels of drop out.



*Abandonment ratio per device used for answering*

However, time spent answering the questionnaire according the device used doesn't seem to fully explain this effect. Despite the fact that it took 10% longer to do it using a tablet or mobile than using a desktop or laptop, the abandonment ratio for tablets is the lowest.



Regarding the CATI method of recruitment, improvements implemented such as sending the link immediately after recruitment, emphasising the incentive during the recruitment call and making the incentive more versatile, helped to improve completion rates from 19% in the first pilot to 23%. This achievement was possible thanks to the dramatic increase in the percentage of recruited people that started the interview, from about 30% in the first pilot to 53% in the final test. Nonetheless the abandonment ratio increased significantly from 19% to 50% due to the fact that this time the respondent had to deal with the full EGM questionnaire, about four times longer than the used in the first pilot.

To realise the importance of this effect during the test suffice it to say that only Section A was responsible for 72% of total dropout. This way both effects were offset to achieve some good increase in response efficiency.

Regarding the 'door to door' method, the results were disappointing. Despite all the improvements implemented: better interviewer endorsement, better look & feel of the invitation card, and higher versatility of the incentive beyond Amazon redemption only, the completion rate was as small as the pilot one and lower than 0,5%. So the amount of interviews gathered this way was negligible.

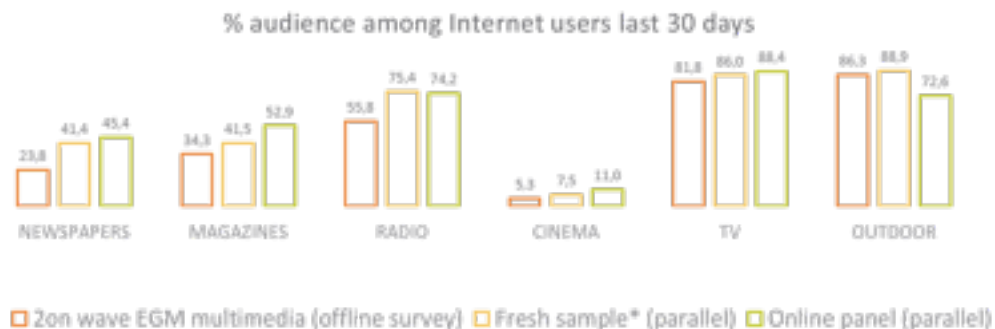
Of course, in both cases the new modular approach of the questionnaire layout was critical to allow more than half of the respondents to answer the median 45 minute interview via mobile or tablet. Time spent per section was similar to that obtained in the second pilot.

Regarding the online panel leg, sample funnel rates were as expected and close to previous experience with this type of surveys. 83% of the panellists answered the survey using PC or laptop.

Finally, 74% of respondents from random recruitment (from CATI or card hand outs) were open to participate another time if they were invited again for this type of survey. Not surprisingly this score increased to 94% among panellists.

### Audience results

Parallel testing casts reasonable data compared to the actual EGM wave. As expected, the audience ratings per media are broadly higher but in a consistent way. This effect is more pronounced among panellists.



*\* Fresh sample: CATI and door to door cards recruitment*



AIMC and Ipsos are now analysing audience data for each medium and vehicle in order to fully understand all implications on comparability of an eventual migration.

### **Conclusions: what will AIMC do now?**

After some unsuccessful attempts in the past it seems AIMC and Ipsos have finally managed to design a sound solution for moving part of the current EGM multimedia sample to online. In this achievement it was crucial to develop a mobile friendly questionnaire able to deliver the respondent a satisfying experience despite its long length exceeding 45 minutes in some cases. This development justifies by itself all dedicated resources and efforts because it's a key asset to evolve EGM survey to the digital age in the near future. AIMC and Ipsos are really proud with the output of this collaboration as a first step towards this direction.

Of course, deeper analysis about the implications on comparability is needed, specifically about the effects on audiences by title. The experience of the respondents through the mobile should also be further improved. But the first step has already taken place and from now on things should be easier.

AIMC is now considering different scenarios for 2018. One of them is to start the migration to online stepwise, introducing a small part of total sample at the beginning and in the following years to progressively increase its weight. Their idea is to do this using fresh sample only as the panel one is consistently delivering even higher audience ratings.

In sum, thanks to the collaboration between AIMC and Ipsos, EGM is now in better position than ever to overcome the digital challenges it is facing and to keep being the establishment survey of the sector for many years.