閱聽眾測量 5.0

文　　| Andrew Green, Global Head of Audience Solutions at Ipsos Connect

編譯　| June Chen　益普索公關行銷專員

導言

我們正在進入閱聽眾測量（Audience Measurement）的第五個時代。為適應瞬息萬變的媒體環境，測量方式正重新地被校準，全面理解受眾的需求也達到高峰。同時，在這個時代，比起技術上的障礙，經濟與政治更是阻礙進步的因素。

回顧歷史上的閱聽眾測量方法，至少有四個關鍵發展階段，而我們現在進入的第五個階段，是不一樣的。

但也不是完全不同。在第五個時代，我們可以預期許多技術和方法都已經到位：任何裝置都能相容的調查方式、被動的資料蒐集、多元資料源與傳統調查資料的整合等。而高品質的測量方式及其專業人員將持續扮演重要角色。

可能需要改變的是各行業者對於改變及共同努力的態度。對變革的恐懼在實施新方法的過程中一直是一大障礙，而這樣的障礙也往往由於測量更多平台的成本增加，以及更快更頻繁地報告產出而加劇。儘管數位技術已經打亂了各種商業模式，也帶來了選擇的困難，我們還是得接受這樣的改變。

只要各個利益相關者之間可以商定優先權，不同媒體之間的合作（例如，共享一個搭配多種資料蒐集技術的資料庫）也提供了一種克服經費挑戰的方式。在大數據轉化為有意義的洞察方面，資料科學也扮演著更為重要的角色。

閱聽眾測量的摘要歷史	
1920 年代之前	報章雜誌流通量稽核之發展
1920 年代	第一次的廣播收聽率調查
1930 年代	最早期的廣播日誌及讀者調查
1940 年代	視聽記錄儀的使用（電視）；旅程調查的發起 （戶外媒體）
1950-1970 年代	更完善且能夠推廣至全球的研究方法
1980 年代	電視收視記錄器
1990 年代	網路受眾測量的開始
2000 年代	被動測量（廣播）；GPS 測量儀（戶外媒體）
2010 年代	跨平台測量的演變（影片，音訊，文字等）

閱聽眾測量 1.0 —計算「單位」

最早測量閱聽眾的方式是計算報紙和雜誌的發行量（銷售份數），而非實際閱讀人數。在 20 世紀初期，主要的媒體為出版商，他們不需要與廣播、電視、及網路競爭。發行量稽核組織（Audit Bureau of Circulations）於 1914 年在美國首次創立，專門稽查出版品的流通量。

在 1930 年代，美國和英國都在進行住戶調查，以核查家戶成員購買的出版物。不過在當時，還沒有人開始了解讀者的人口結構或其他特徵。

除了報紙和雜誌的發行，收音機的銷售和觀眾的信函，也在一些地方被用來幫助廣告商評估媒體機會，並幫助媒體銷售人員對他們的產品進行定價。

閱聽眾測量 2.0 —計算「人」

在兩次世界大戰之間，報紙、雜誌和廣播電台開始採取調查方式來進一步了解他們的受眾。1929 年全美廣告商協會（Association of National Advertisers）在美國進行了第一次的廣播聽眾研究，而當時的廣播電視業者也迫切地需要向廣告贊助商證明新媒體的價值及受歡迎程度。

讀者研究方面，目前追溯到最早的調查則是 1939 年的「新聞讀者調查（Survey of Press Readership）」，該調查由英國廣告代理協會 IIPA 贊助。同時其他類似的研究也在世界其他地方展開。

從計算出售的實品單位進化到人群的調查的這個階段，代表了閱聽眾測量的第二個時代。

閱聽眾測量 3.0 —更廣更深

從 1940 年代到 1970 年代，廣播，報紙和雜誌的閱聽眾調查擴展到更多的國家，而媒體日誌的出現是為了蒐集觀眾的行為。電視和廣播等媒體為了要出售廣告，需向廣告客戶展示數週或數月的廣告活動所觸及的人數。

1949 年，尼爾森在紐約引進了第一台電視測量儀來測量轉台的行為，測量儀在之後的幾年迅速地被擴大使用，並同時佐以個人觀看行為日誌作為測量資料。

在這些方法發展的同時，讀者的測量方法也正繼續進化出更加複雜的方法，其更詳細的稽核及更具方法論的測量工作，讓受訪者在研究訪談中給出更準確的回答。

即使是在這段時間內，被研究最少的媒體之一，戶外媒體，也開始在少數地方進行旅程調查（第一次是在 1946 年在印第安納州的韋恩堡進行）。不過旅程調查不足以代表各個獨特城市的戶外環境，因此戶外媒體也是最早採用統計模型，從旅程調查來預測受眾行為的媒體之一。

在 1940 年代中期到 1980 年代初期，閱聽眾測量持續在改變，不過其中很大一部分是在完善當時現有方法，而不是發明新方法。在 1950 到 1960 年代，在方法上沒有都沒有特別重大的變化，原因是當時也沒有什麼理由需要這麼大的改變。

在此期間，廣播和電視媒體已經擴大觸及了工業化世界的大多數人口；報紙和雜誌被廣泛地傳播和閱讀，透過這些媒體，消費品和服務業公司開始瞭解到市場行銷和廣告的價值，因此他們在行銷廣告上的花費也越來越高。

閱聽眾測量 4.0 —面對更多的媒體

到了 1980 年，幾乎所有的電視收看都是直播的。美國以外的大多數人在電視和廣播頻道的選擇非常有限。報紙和雜誌改善了印刷流程並擴大了規模和數量，不過除此之外，基本上都與過去幾十年來一樣。

然後這一切都改變了。在大約 1980 年之後的三十年左右，媒體的選擇出現爆炸性地成長：數百個電視台和電台發起，報紙和雜誌越做越大，當然還有網路的推出，以及更多接收媒體資訊的裝置設備。

為了應對媒體世界分散化、數位化、全球化及更激烈的競爭挑戰，閱聽眾測量的技術必須有所改革。

對於電視來說，第一個重大改變是電視收視記錄器（people meter）的問世。1980 年代初期收視記錄器首次推出後，就迅速擴展成為衡量電視觀眾的方法。以收視記錄器為測量受眾，只須要求受測成員指出他們是否在監視電視機的房間中，這讓研究人員能更容易地記錄受測者的觀看行為，受測者無須再填寫日記或記住他們觀看的電視內容。

廣播研究開始透過線上或行動裝置讓受訪者填寫日誌。在少數幾個國家中，已經採用了被動的測量設備，能自動抓取接觸到的音訊，受測者無需記下聽到的內容。

在讀者調查方面，目前有二十多個國家是透過網路蒐集資料，包括實體印刷及數位閱讀的測量。而戶外媒體方面，雖然並不普遍，不過已有些國家採用了 GPS 測量儀來追蹤旅程行為，其中結合了外部數據資料（例如道路交通量），以估計經過戶外海報架的受眾數量。

網路是世界上發展最快的廣告媒體，也經歷了幾個測量方式的發展階段。網路本身有個內建的系統，來辨別及統計網頁瀏覽次數。但這個數字必需轉換到一個能夠分辨造訪網頁的裝置、造訪網頁的所在國家位置，以及排除機器人及網路爬蟲造訪紀錄的測量系統。

這是一種透過混合多種測量方法發展而成的統計方式，能結合網站的瀏覽次數及其他觀測方法，以統一地觀測受眾。

在此我們稱之閱聽眾測量的第四個時代，是個以測量家庭和個人的時代，且有越來越多的線上調查，透過越來越多種平台進行，同時也是目前大多數國家進行媒體測量的方式。

閱聽眾測量 5.0 —任何地點、時間、及平台

閱聽眾測量 5.0，益普索稱之為，跨媒體及平台受眾的全面了解（Total Understanding）。在閱聽眾測量變革的第五個時代，至少有五個核心原則。

平台中立

首先，在這個時代，閱聽眾測量將會是**平台中立（platform-neutral）**的。受眾無論在何時何地接觸媒體內容，都會被觀測。在過去，一種測量方式只能以一種特定媒體管道（如電視或報章雜誌）為中心進行觀測。而現在，受眾會在透過各種不同的管道接收相同的廣告內容，因此各個平台都需要被納入測量。

就電視來說，雖然大多數人還是按過去一貫的方式，在電視機上觀賞電視節目，不過隨著時間平移觀看（time-shifted viewing）行為的增加、越來越多人使用非電視設備觀看電視節目、及新興的內容提供者帶來的競爭，觀看電視節目的方式正慢慢在發生變化，年輕觀眾尤其如此。

當然，很多年前我們就已經能將電視節目時間平移了。最早以前是錄放影機，然後是數位錄放影機，直到最近是電視公司提供的回放服務（例如英國的 BBC iPlayer 或 ITV 播放器，美國的 Hulu 和澳州的 7Plus 或 TenPlay）。

即使是最傳統的觀眾也開始使用時間平移的功能。在美國，觀眾平均每天花費半個多小時觀看時間平移的節目，約佔電視總觀看次數的 12％，在澳州的比例也很相似。

而在英國，已有大約 15％的電視觀看是屬於時間平移的節目，且這個數字在過去十年裡，持續逐漸上升。

英國時間平移的成長：2006 - 2017 年

現今網路速度之快已經方便我們在個人電腦、筆記型電腦、平板電腦或智慧手機上觀看影片。尤其是年輕一代有越來越多的人都在非電視裝置上收看節目，他們已經習慣用與父母及阿公阿嬤不同的方式的收看電視節目。

他們不再是飯後坐在電視機前，被動地接收任何電視台安排的節目，而是主動地上網搜尋節目，並評估是否觀看，或自行排定的節目，觀看時間及觀看內容都是他們自己決定的。

英國廣播受眾研究會（Broadcasters' Audience Research Board，BARB）估計，透過各種電視播放器收看電視公司節目內容的所有觀看中，在非電視設備上觀看的時間只有 1-1.5％。

但人們也會在電視機以外的裝置上觀看其他內容。例如，YouTube 用戶每天上傳超過 10 億小時的視頻內容。Netflix（全球 1.09 億用戶）和亞馬遜（超過 1 億亞馬遜 Prime 會員）等串流媒體服務吸引了越來越多人訂閱並付費觀看無廣告的影片。

不過測量服務並不是總能夠跟上所有的觀看變化。我們能知道有人在電視機上觀看節目，但卻無法知道實際被觀看的內容，因此觀測存在了很大的盲點。較年輕的觀眾尤其如此，且在其他裝置上的測量更是複雜。

不僅電視受到數位革命的影響，現在越來越多人也在網路上閱讀報紙和雜誌。許多人甚至在個人電腦或智慧手機上收聽廣播，或是透過 Podcast 收聽廣播內容。

閱聽眾測量在很大的程度上已經跟上媒體接收行為的變化，測量技術與方法都發展到幾乎能夠追蹤任何平台上的電視節目觀眾，無論是透過直播、時間平移或串流的方式、在家中或室外。廣播、報紙及家外廣告都是一樣。

受訪者友善的

閱聽眾測量 5.0 的第二個必要條件是**受訪者友善的（respondent-friendly）**，多年前人們會樂意打開門或接電話回答陌生人關於媒體使用的問題，或是同意在電視機上安裝特殊設備來追蹤他們觀看的內容。

不過我們現在已處於一個不同的世界，現代人比以往忙碌，花在計畫事務以外的時間越來越少，也更具安全意識，陌生人鮮少會經過家門口，擁有家用電話的家庭數量下降，取而代之的是行動電話，因此接觸受訪者、抽樣及招募都越來越困難。

來自推銷員的陌生拜訪電話數量已經引起厭惡。當人們得知來電者為陌生人時他們就會選擇掛斷，或是拒絕聆聽很長一段時間，以避免接收銷售訊息。

因此，招募受訪者並且維持受訪者對研究的興趣，比以往任何時候都更具挑戰性，但同時在建立一個準確、具代表性、可信的閱聽眾測量資料庫上，能有效發揮作用。

其中一種方法是，讓受訪者能透過他們最熟悉的裝置（例如紙，智慧手機，平板電腦，個人電腦等）進行調查。世界上已經有幾項廣播研究，提供受眾以這樣的方式進行日誌的填寫。

還有一種是是被動式的資料搜集。一旦相關技術安裝到受訪者的裝置上，幾乎不需要主動訪問受訪者。

益普索的被動電子測量工具，MediaCell，就是我們所稱「被動簡單性（passive simplicity）」一個很好的例子。我們詢問受訪者是否能在手機上安裝應用程式來替他們進行記憶，而不是請他們回想，在過去一段時間裡他們的收音機收聽或電視收看行為。

首先將電台廣播的音訊寫入特殊的編碼。然後，我們要求受訪者下載應用程式到他們的智慧手機中，接著只要手機接收到特定的音頻，就可以檢測到這些編碼。受訪者會被要求隨身攜帶手機，開機並且充電，僅此而已！他們不需要記住其他任何東西。況且反正無論如何他們總是帶著手機，這些要求對他們來說不是困難或不尋常的事情。

其他被動應用程是也可以安裝在同一台設備上，以追蹤網路的使用，進而更全面地了解個人媒體使用行為。

大數據

閱聽眾測量 5.0 的第三個組成要件是大數據。大數據有很多不同的種類，在電視方面，我們可以透過機上盒（他們需要接收衛星或有線信號）來搜集家庭中以秒為單位的影片內容播放細節。利用路由器測量儀和其他方法，我們還可以查看各種網路的使用情況，包括觀看或收聽串流影

片及音訊，以及線上獲取文字或圖片的紀錄。戶外受眾的測量，則可以透過多個來源獲取交通和行人的流量，以估算有多少人經過廣告架。

研究方式的混合

閱聽眾測量 5.0 的第四個特點是，它將會是混合的型態。換句話說，越來越多的外部來源（大部分是大數據）必須結合樣本資料。從裝置上搜集來的數據，結合以調查為基礎的數據，才能轉換成有意義的閱聽眾裝置使用行為資料。

例如，若是只有透過機上盒所蒐集到的數據，我們只能知道什麼節目正在播放，但不知道誰在觀看。透過流通量數據，我們只知道有多少份報紙或雜誌被出售或分發，但不知道實際上有多少人閱讀。

在上面我們已經注意到了，網路受眾測量數據，通常結合了網頁瀏覽（即裝置請求）普查數量與樣本資料，以轉化為受眾的估計數據。

在少數國家中，以調查為基礎的讀者研究，透過樣本庫縱向資料，和報章雜誌銷售數據，為過去廣泛性的估計數據增加了更細節的資料。

益普索的戶外媒體測量系統「Route」就是一個研究方式混合的好例子。它結合了道路交通流量、火車及公車時刻表、購物中心人流技術等數據與旅行調查，以產生受眾估計。

不斷擴大的閱聽眾測量系統覆蓋更多的平台、更細節的資訊和更快的報表產出，有時候還會有多種技術結合起來，測量同一群人在不同媒體上的使用行為。換言之，例如電視、無線電、網路及讀者資料等這些以前被認定各自為獨立的測量系統，是可以結合統一成一種測量方式的。

不過在這方面的障礙，政治性因素是多於技術性因素的⋯⋯

資料科學

閱聽眾測量 5.0 的最後一個主要特徵，是在測量系統中作用越來越大的資料科學。資料科學在閱聽眾測量中已經相當成熟，且將成為其核心。前面提到的所有不同的訊息都需要結合起來，而我們可以透過統計和演算法來做到這一點。

最普及的技術包括資料歸屬（data ascription），資料整合（data integration）和建模（modelling）。資料歸屬將某些問題的答案「歸因」（根據受訪者的人口統計特徵及其他問題的回答），而非向受訪者訪問長問卷，如此一來問卷就能有效縮短。

資料整合讓我們能從不同的研究，找出類似的人群，以不一樣的方式結合這些人的資訊。

透過建模，我們可以從調查及其他來源所蒐集到的有限資料來瞭解受眾的行為，甚至可以透過設置好的資料庫來預測觀看行為。

簡而言之，資料科學是將觀眾測量 5.0 的其他四項必要條件結合在一起的粘著劑，讓我們能夠從多個來源中獲取大數據，並提供跨平台媒體使用的洞察，同時還減輕了受訪者的負擔。

結論

- 閱聽眾測量 5.0 的技術和方法在很大程度上，已經可以衡量現今我們需要測量的所有媒體。雖不完美，但在基本面上已經有很好的發展，且還在日益增進。

- 但這不代表這些技術已經被採用，甚至會被採用。大家都喜歡進步，但幾乎沒有人喜歡改變。實際上，這樣的停滯還會持續很長一段時間。排名是閱聽眾測量最重要的部分，一個組織若在測量方法的改變後贏得排名，那麼新的方法將會得到擁戴；反之，若在使用新的方法後排名下降了，那麼新的方法就會遭到大力抨擊。

- 當引入新方法時，數字的變化有可能會造成很大的干擾。排名下降的可能性，甚至會讓付費使用閱聽眾測量方法的人，不願意做出改變。

- 另一個明顯的變革障礙是成本。數位革命已經對商業模式帶來了挑戰。除了傳統的電視和廣播網絡之外，報紙和雜誌出版商也不得不在艱難的環境下進行痛苦的調整。然而，閱聽眾衡量方面的進展通常涉及測量更多平台，更快速和更頻繁地進行報告。以及前面提到的，說服人們參與調查也越來越困難。所以壞消息是，方法的改變將會花費更多成本。

- 好消息是，這樣的測量方式是可以被採納使用的，也確實有些地方正在使用它。若有更多的組織願意考慮新的測量方式，那麼成本將能夠被分攤。例如不同媒體之間的合作，共享一個配備多種資料蒐集技術的資料庫，也能克服經費的挑戰。

Ipsos Connect 益普索媒體與傳播研究

Ipsos Connect 結合 Ipsos 全球產品服務，專精於品牌溝通、廣告測試及傳播媒體的相關研究。現今品牌溝通由於廣告及傳播媒體變得日益複雜、零碎及數位化，而更顯複雜困難。Ipsos 擁抱這複雜且現在的環境，整合品牌表現調查及媒體環境內容，並提供我們客戶更創新、真實、即時且數據和科技驅動的研究發現洞察。

更多的資訊，請參考 https://www.ipsos.com/en/solution/media-brand-expression-ipsos-connect
　　　　　　　　　或洽詢我們的研究團隊
　　　　　　　　　研究總監 Darren Freeman 費愷毅
　　　　　　　　　02 2701-7278 ext.155   darren.freeman@ipsos.com

Audience Measurement 5.0

Andrew Green, Global Head of Audience Solutions at Ipsos Connect

Introduction

We are entering the Fifth Age of Audience Measurement. It is an age where methodologies are being re-calibrated in response to a fast-changing media environment and where the quest for total understanding of audiences is higher than it has ever been. It is also an era where politics and economics are far greater barriers to progress than technical concerns. Looking back into history, we can say that there have been at least four key phases of development in audience measurement methods and that the one we are entering now – the Fifth Age – is different.

But not completely different. Many of the techniques and methods we can expect to feature in this Fifth Age are already in place: device-agnostic surveys, passive data collection, the integration of multiple data sources with traditional survey data etc. And there continues to be a role for high quality methods and skilled human practitioners in the process.

What may need to change is the attitude of the various industry players to change and to working together. Fear of change has been a great barrier to progress in implementing new methods – often exacerbated by the rising cost of measuring more platforms and reporting faster and more frequently. But digital technology has disrupted every business model and must be embraced, even though it offers difficult choices for many.

Co-operation amongst different media (e.g. sharing a panel equipped with multiple data collection technologies) offers one potential way of overcoming the financial challenges – as long as priorities can be agreed amongst the disparate stakeholders. Data science also has a far greater role to play in turning Big Data into usable insight.

Audience Measurement: A Potted History	
Pre-1920	Development of newspaper/magazine circulation audits
1920s	First radio survey
1930s	Earliest radio diaries and readership survey
1940s	Audimeter deployed (TV); travel survey initiated (OOH)
1950s - 1970s	Further refinement and global spread of methods
1980s	Peoplemeters for TV
1990s	Internet audience measurement initiated
2000s	Passive measurement (radio); GPS meters (OOH)
2010s	Evolution of cross-platform measurement (video, audio, text…)

Audience Measurement 1.0 - Counting units

The earliest efforts to measure audiences centred around verifying newspaper and magazine circulation claims (number of copies sold) rather than the number of people actually reading them. They were sponsored by publishers, who did not need to worry about competition from radio, television or the internet in the early part of the 20th century. The Audit Bureau of Circulations was first created in the United States in 1914 to provide independent verification of the circulation claims made by member publishers.

In the 1930s, household surveys were carried out in both the USA and the UK to verify which publications were being purchased by household members. At the time, nobody was looking to find out the demographics or other characteristics of readers.

As well as newspaper and magazine circulations, radio set sales and viewers' letters were also used in some places to help advertisers evaluate media opportunities and to support media sales people pricing their product.

Audience Measurement 2.0 - Counting people

During the inter-war period, newspapers, magazines and radio stations started to employ surveys to give them better insight into their audiences. The first radio audience study was carried out for the Association of National Advertisers in the United States in 1929; there was a critical need at the time for radio station owners to prove the value and popularity of what was then a very new medium to the advertisers which funded the industry.

The earliest readership study of the sort we might recognise today was the 1939 Survey of Press Readership, sponsored by the UK's advertising agency trade association, the IIPA. Other similar types of study were also being created elsewhere in the world.

This move from counting physical units sold to surveys that could be projected to a population represented the second age of audience measurement.

Audience Measurement 2.0 - Counting people

From the 1940s through to the 1970s, surveys of radio, newspaper and magazine audiences spread to many more countries. Media diaries were introduced to collect audience behaviour over time for media like television and radio, which sold packages of spots to advertisers and needed to demonstrate how many people were reached by advertising campaigns lasting several weeks or months.

The first TV meters were introduced by Nielsen in New York in 1949 to measure set tuning activity; this was to expand rapidly over the following years, supplemented by separate diary studies of viewing behaviour from individuals.

While all this was going on, readership measurement continued to evolve ever more sophisticated approaches, with very detailed scrutiny and methodological work being carried out on how best to prompt survey respondents to give accurate answers in the context of such studies.

Even Out of Home media, one of the least well researched media during this period, started to carry out travel surveys in a small number of places (the first being in Fort Wayne, Indiana in 1946). It was also one of the earliest media to employ statistical modelling to project audiences from travel surveys, which could never be large enough to represent every unique urban OOH environment.

But although there was a lot happening in audience measurement between the mid-1940s and the beginning of the 1980s, much of it was about perfecting existing techniques rather than initiating new ones. Few radical changes were made in the basic methods and approaches developed in the 1950s and 1960s – because there was little reason to do so.

During this period, radio and television media expanded to cover the majority of the populations in the industrialised world; newspapers and magazines were widely distributed and read and consumer goods and services companies spent more and more every year as they began to appreciate the value of marketing and advertising through these media.

Audience Measurement 4.0 - Facing up to fragmentation

By 1980, almost all television viewing took place live, on television sets. Most people outside the United States had very limited choice in the number of TV and radio channels they could receive. Newspapers and magazines had improved their printing processes and expanded in size and number – but they were still basically the same entities as they had been for many decades.

Then it all changed. For the thirty or so years after about 1980, media choice exploded: hundreds of television and radio stations were launched, newspapers and magazines got bigger and better and, of course, the internet was launched, as well as a range of new devices for accessing media content.

To meet the challenges of fragmentation, digitisation, greater competition and globalisation of the media world, audience measurement techniques had to evolve.

For television, the first big change was the introduction of people meters. First launched in the early 1980s, they rapidly expanded to become the *de facto* approach to measuring and reporting audiences. Peoplemeters – which require panel members to indicate their presence or absence from a room where a television set is being monitored - allow individuals to more easily record their viewing behaviour without having to remember to fill in a diary or otherwise remember what they watched.

Radio studies began to complement the paper diary with one that could be completed online or via a mobile device. In a handful of countries, passive metering devices have been deployed which automatically capture the audio signals they are exposed to without survey participants being required to remember what they listen to.

Readership surveys in more than 20 countries now collect some or all of their data online and include measurement of both print and digital reading. Out of Home media, while still not universally measured, have employed GPS meters to track travel behaviour in a number of countries, combining this with external data on people's journeys (e.g. traffic counts on roads) to project the potential audience passing by individual poster frames.

The internet itself – the world's fastest growing advertising medium - also went through several stages of measurement. It has a built-in system for identifying and counting the number of times a web page is opened. But this has to be transformed into a measurement system that turns what are effectively device requests into a count of the people using the devices and which also needs to exclude the 'bots' and crawlers continuously indexing the web and people viewing web pages from outside their home countries.

This has been achieved through the development of 'hybrid' measurement approaches which combine the site-centric web page counts with panels and other methods into a unified view of the audience.

What we call here the fourth age of audience measurement - an age of household and personal meters, of an increasingly cross-platform focus and where a growing number of surveys are being carried out online - is how most media in most countries are measured today.

Audience Measurement 5.0 - Anywhere, anytime, any platform

Audience Measurement 5.0 is all about what Ipsos calls a Total Understanding of audiences across media and across platforms. There are at least five core principles underlying the evolution of audience measurement into its fifth age.

Platform-neutral

The first is that it will be **platform-neutral**. Audiences will be measured from wherever they consume media content, whenever they are exposed to it. In the past, measurement centred around a particular distribution channel (like a television set, a printed newspaper or a magazine). Now that audiences of the same content can access it in many different ways, each platform needs to be included in the measurement.

Take television. Most people today watch television the way they always have – live and on a television set. But this has slowly been changing, with the growth in time - shifted viewing, in the use

of non-TV devices to watch television and with competition from new video content providers. This is particularly true for younger viewers.

It has of course been possible to time-shift television programmes for many years. First were video recorders, then Digital Video Recorders and, most recently, the 'catch-up' services offered by broadcasters (like the BBC's iPlayer or ITV Player in the UK, Hulu in the US and 7Plus or TenPlay in Australia).

Even the most conservative of viewers are starting to make use of this technology. In the United States, the average viewer spends more than half an hour every day watching time-shifted programmes, which represents around 12% of total viewing on the TV set. In Australia, the viewing share is similar.

In the UK around 15% of TV set viewing is now time-shifted, a figure that has risen gradually over the past decade.

The Growth in Time-Shifted Viewing in the UK: 2006-2017

Internet speeds have made it increasingly practical, as well as convenient to watch video on PCs, laptops, tablets or smartphones. More and more people are doing this – especially the younger generation, who have become accustomed to a different kind of television experience to that of their parents and grandparents.

Instead of sitting down after dinner to watch whatever the schedule throws at them, they may search for or browse video content online and evaluate whether to watch that or the scheduled programmes. They watch what they want to, when they want to watch it.

BARB in the UK has estimated that when it comes to viewing content from broadcasters via the various TV players, people spend only around 1-1.5% of their television viewing time watching on non-TV devices.

But they do watch other content on these devices. For example, YouTube users upload more than a billion hours of video content every day. 'Over the Top' streaming services like Netflix (109 million subscribers worldwide) and Amazon (more than 100 million Amazon Prime members) have attracted a growing number of people to subscribe to and view their advertising-free fare.

Measurement services have not always been able to keep up with all this viewing (which is not helped by the reluctance of Netflix and others to be measured). Significant 'blind spots' exist, where it is known that somebody is watching television on a television set, but simply cannot identify what is being watched. This is particularly the case for younger viewers. It is even more complex on other devices.

It is not only television that has been affected by the digital revolution. A growing number of people are reading newspapers and magazines online. Many are also listening to radio on their PCs and smartphones and listening to podcasts of radio content.

Audience measurement has had to keep up with all these changes in behaviour. And, to a large extent, it has. Technologies and methods have been developed which track television audiences from pretty much any device, whether the viewing is live or time-shifted, streamed or broadcast or inside or outside the home. The same applies to radio, newspaper and Out of Home audiences.

Respondent-Friendly

A second requirement for Audience Measurement 5.0 is that it should be **respondent-friendly**. For many years, it was relatively easy to get people to take part in interviews. They were happy to open their doors or answer the phone to strangers and respond to questions about their media usage or agree to have special equipment installed in their television sets to keep track of what they watched.

But we live in a different world today. People are busier than ever, with less time to spend on unscheduled tasks. They are more security conscious. Strangers rarely get through the front door or even as far as the door in apartment buildings. Access has also been made more difficult by a fall in the number of households with landlines, which have been displaced by mobile phones. Sampling, as well as recruitment has become increasingly hard as a result.

The volume of cold calls from salesmen has inured people to them; they will hang up as soon as they don't recognise the person on the other end of the line or refuse to listen for very long in case they are being tricked into hearing a sales message.

So recruiting and then retaining the interest of participants in a research study is more of a challenge than ever – yet must play a part in generating accurate, representative, credible, audience measurement data.

One approach is to enable them to respond to surveys on whichever platforms they are most comfortable with (e.g. paper, smartphone, tablet, PC etc.). Several radio studies around the world already offer this for their audience diaries.

Another is to collect data passively, asking little of respondents once the relevant technology has been installed on their devices.

Ipsos's passive electronic measurement tool, MediaCell, is a good example of what we call 'passive simplicity'. Instead of asking people to recall their radio listening or TV viewing behaviour over a period of time, we ask them if we can install an app on their phones to do the remembering for them.

We start by inserting a special code[2] into the audio signals broadcast by stations. We then ask a representative sample to load an app into their smartphone which can detect these codes whenever the phone is within audio range. People are asked to keep their phones with them, switched on and

charged. That's it! They don't have to remember anything else. And because they carry their phones with them anyway, we are not really asking them to do anything difficult or unusual.

Other passive applications can also be included on the same devices to track internet access, offering a fully rounded view of a person's media consumption.

Big Data

The third component of Audience Measurement 5.0. is Big Data. There are lots of different kinds of Big Data. For television, we can access details of the video content households tune into second-by-second through their set-top boxes (which they need in order to receive satellite or cable signals). Using router meters and other methods, we can also look at all kinds of internet usage, including access to streamed video or audio, as well as requests for text or imagery online.

For Out of Home audience measurement, traffic and pedestrian counts are available from multiple sources to help estimate how many people pass by poster frames.

Hybrid

The fourth feature of Audience Measurement 5.0 is that it will be hybrid. In other words, it will increasingly comprise a mix of information from external sources (much of it Big Data) alongside sample-based information which turns data on devices into data about people using the devices.

The set-top box data on TV audiences, for example, can be attached to a household. But it tells us about set tuning, not about who is viewing. Circulation data tells us how many copies of a newspaper or magazine are sold or distributed, but not how many people read each copy.

We already noted above that internet audience data often combines a census count of webpage views (i.e. device requests) with panel data helping transform it into audience estimates.

In a small number of countries, survey-based readership research has been enhanced by longitudinal data from panels and by newspaper and magazines sales data, which can add granular detail to what were historically broad-based estimates.

The Ipsos *Route* Out of Home measurement system in the UK is a good example of a hybrid approach. It combines data from road traffic counts, train and bus timetables, shopping mall footfall counts and much more with travel survey data to generate audience estimates.

The economics of continually expanding audience measurement systems to cover more platforms, more detail and faster reporting may lead, in some cases, to combining multiple technologies to measure the different media consumption behaviours of the same people. In other words, previously separate measurement systems covering (e.g.) television, radio, the internet, readership etc. could

conceivably be combined into a unified approach. The barriers to this are more political than technical...

Data Science

The final major feature of Audience Measurement 5.0 – already well-established in Audience Measurement today, but set to become central to it – is the growing role of data science in our measurement systems. All the disparate strands of information noted earlier need to be joined together, and the people we call the 'Maths Men' can do this using clever statistics and algorithms.

The most popular techniques include data ascription, data integration and modelling. Ascription helps us limit the length of questionnaires by 'imputing' answers onto part of a sample instead of needing to ask them all the questions on a long survey (based on their demographic characteristics and the answers they give to other questions).

Data integration enables us to combine different studies together using 'hooks' that help us find similar people from each study and combine their information in various ways.

Modelling lets us project behaviour from limited data collected from surveys and other sources and also to (for example) predict the viewing behaviour of people from set tuning data.

Data Science, in short, is the glue that joins together the four other key requirements of Audience Measurement 5.0 - allowing us to deliver cross-platform insights, with reduced burden on respondents, potentially drawing on Big Data from multiple sources.

Conclusion

- The technology and the methods for Audience Measurement 5.0 are largely in place to measure everything we need to measure today. They are not perfect and they will get better, but the fundamentals have been developed.

- But this does not mean they have been – or even will be - deployed. It has been said that everybody likes progress, but nobody likes change. In practice, this can hold things up for a long time. The ratings are the lifeblood of the media being measured. If an organisation wins from a change in method, it is likely to vigorously promote it; if it loses its place in the rankings or otherwise has a less good story to tell, it is more likely to find and focus on any flaws or limitations in a new approach.

- When new methods are introduced and the numbers change, it can be very disruptive. Even the possibility that their place in the rankings will fall can have a negative impact on the willingness of those who pay for audience measurement to make any changes.

- The other obvious barrier to change is cost. The digital revolution has challenged business models. Newspaper and magazine publishers, alongside traditional TV and radio networks have had to make painful adjustments amidst difficult trading conditions. Yet progress in audience measurement usually involves measuring more platforms, reporting more quickly and more often. It is also, as noted earlier, getting harder to persuade people to participate in surveys and panels. So the bad news is that this will cost more.

- The good news is that it can be done and in some places is being done. Costs could be amortised amongst more players if they are willing to consider it – for example combining radio, internet and television measurement using passive data collection methods.

Ipsos Connect

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https://www.ipsos.com/en/solution/media-brand-expression-ipsos-connect

or contact our research team:

Darren Freeman, Research Director

02 2701-7278 ext.155   darren.freeman@ipsos.com