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 7\textsuperscript{th} April to 12\textsuperscript{th} May 2020
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
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
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!
1. The impact of COVID-19 on media consumption
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?)
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
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
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...
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....
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..
...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
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)
3. The death of face-to-face interviewing?
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
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
... 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
7: Organisational change and concentration of currency bodies
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’
Get in touch

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