

Research + Audience Marketing

# Who's Listening?

New tools  
help marketers  
improve their  
targeting

By Richard Westlund

**T**o succeed in marketing, you must know your consumer. In today's multi-platform media world, granular audience information derived

from research and media measurement tools can provide vital insights and intelligence. Consider the following:

- Almost half of Americans over 12 now have social network profiles, a trend that is reshaping consumer behavior and advertising strategies.
- Out of home (OOH) television viewing may constitute as much as 30 percent of a program's total audience.
- And, contrary to conventional thinking, morning drive radio audiences actually increase before the top-of-the-hour commercial break.

By providing these types of insights into audience behavior, research and

The rise in consumer mobility is also reshaping media research strategies, just as it changes media planning and placement. "The ability to consume media anywhere has tremendous implications for content providers and advertisers trying to get their messages to people," Rose adds.



**Bill Rose**  
Arbitron

### Trending now

As the Advertising Research Foundation (ARF) prepares for its Audience Measurement 5.0 Conference this week (June 22-23) in New York, one of the most important topics is the impact of the 2010 U.S. Census.

exercising a choice. But they do not want to feel watched or monitored, so it's important for marketers to be cognizant of their concerns."

Gugel notes that the ARF's "listening" initiative may help capture more data from consumer surveys. "It's designed to associate surveys with other forms of research, such as social media, online conversations and Web sites where consumers talk about products and services," he says. "It's like treating the Web as a live, real-time focus group, and the ARF is seeing how that information can be merged with survey research to make it more robust."

Other issues include defining and delivering cross-media audience metrics, determining what is needed for accuracy in determining cross-platform ROI, and looking at the impact of the iPad and e-readers on the media marketplace.

"We are also looking at data integration, as companies want to merge audience research findings

with their own proprietary data," says Gugel. "We want to see what types of validation are necessary to make certain the data sets will be robust and usable."

### Worshipping the Web

Each year for the past 12 years, Arbitron and Edison Research have studied how people use traditional and digital media. This year—for the first time—more Americans said

## “Companies want to merge audience research findings with their own proprietary data.”

—Craig Gugel, *svp, media analytics, Advertising Research Foundation*

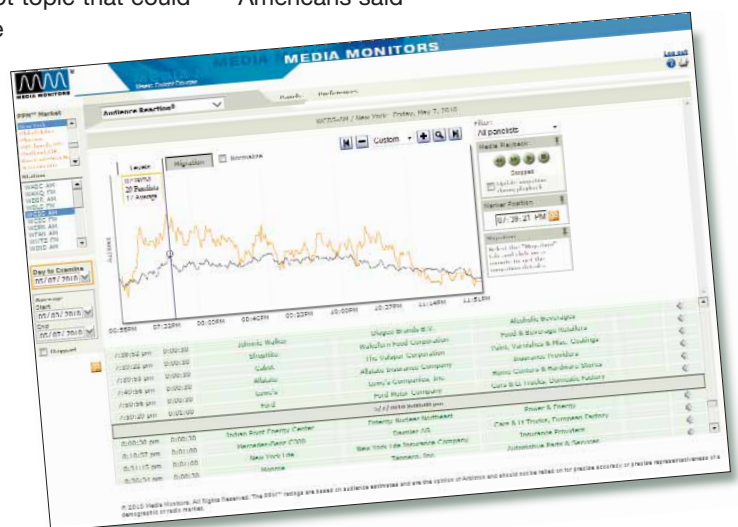
measurement companies help marketers shape their media strategies and achieve a positive return on marketing investments. Today's research companies are moving ahead to address changing media consumption patterns and meet marketers' demands for more insights, more intelligence—and in fact, more of everything:

- Enhanced audience data with granularity—the ability to drill down for those gold nuggets of information.
- Faster reporting on every front, including consumer survey results and listening and viewing audiences.
- Greater ability to incorporate audience findings into their own CRM applications and other business processes.
- Better understanding of cross-platform audiences—how digital, TV, radio and print fit together.

"When we survey people to see how they consume media, the answer is 'all of the above,'" says Bill Rose, *svp of marketing at Arbitron Inc.* "As a result, more brands are studying how to present their content across multiple platforms and want to know the net audience of all the channels."

"The Census results will affect a wide data set for measurements, including Comscore, Arbitron, Nielsen and other rating services," says Craig Gugel, *svp, media analytics for ARF.* Noting that the Census findings will be rolled out over the coming months, he adds, "It is already apparent that minorities are becoming majorities, and multicultural is becoming mainstream."

Privacy is another hot topic that could significantly impact the research and measurement field if Congress passes new legislation. "Trust is the currency in effective advertising," says Gugel. "A strict new privacy law could upend the marketing world. The issue is the procedures in place to keep personal information confidential. If a consumer opts in to release information for a benefit, they are



On the Media Monitors Web site, clients can replay the content that was broadcast and see a graph of peaks and dips in the ratings.

the Internet was the “most essential” medium in their lives, according to the study, “The Infinite Dial 2010: Digital Platforms and the Future of Radio.”

When given a choice of the Web along with television, radio and newspapers, 42 percent chose the Internet as “most essential,” with 37 percent selecting television, 14 percent choosing radio and 5 percent designating newspapers. While television still leads among those over the age of 45, the Internet dominates among people 12 to 44.

“However, what’s really changing is the pipe that brings you video content,” says Larry Rosin, co-founder and president of Edison Research. “There are so many shows available on the Internet that you could get rid of your TV and still watch your favorites. I know people who have



## Key findings

- More teens and adults have personal profile pages on social media sites: 78 percent of teens (age 12-17) and 77 percent of young adults (age 18 to 24), 65 percent of adults age 25 to 34 and 51 percent of adults age 35 to 44.
- 62 percent of homes with Internet access have wireless networks, which makes consumption of digital media easier in any room.
- Growth of residential broadband has leveled off, as 84 percent of homes with Internet access now have broadband connections.
- Texting continues to increase: 45 percent of mobile phone owners age 12 and older (no upper limit) text multiple times a day. Three-quarters of teens (age 12 to 17) and 76 percent of young adults age 18 to 24 text multiple times a day, compared with 63 percent of adults age 25 to 34, 42 percent of adults age 35 to 44, and 37 percent of adults age 45 to 54.
- 48 percent said radio station Web sites have gotten more interesting, compared with 17 percent believing them to be worse or less interesting. However, monthly visits to radio station sites (16 percent) among persons 12 and older lags visitation to local TV and local newspaper sites.

SOURCE: Arbitron/Edison Research, April 2010.

cut the cord from cable or satellite TV because they watch online.”

Arbitron’s Rose notes that the Internet and TV aren’t the only channels that are blending. “The radio business has taken to digital platforms in a major way, including new smartphone apps that let you listen to your favorite hometown DJ or station anywhere you go,” he says.

Despite barriers to in-car listening, 54 percent of iPod/MP3 player owners have listened to their devices in their car stereos, Rose adds. However, nearly eight in 10 respondents plan to listen to as much traditional AM/FM radio in the future as they do now.

Use of social media is rapidly rising among all age groups, the survey says. The percentage of Americans age 12 and older who have a profile on one or more social networking sites reached 48 percent in 2010—double the level from two years ago.

“The use of social networking sites has expanded well beyond younger consumers,” says Rose.

## Ears to the ground

In radio, as in TV, advertisers benefit from precise, minute-by-minute audience measurements, according to Philippe Generali, president and CEO of Media Monitors, which uses Arbitron’s Portable People Meter™ (PPM™) technology in its U.S. multimedia research.

“Traditionally, audience measurements have been active, relying on consumers to report what they watched or heard,” Generali says. “Now, with the PPM, advertisers have a passive source for information—a more accurate and transparent audience measurement system.”

For example, Media Monitors can correlate audience movements in and out of a program, depending on the content. “One of the findings is that the audience during a sports game can be five times as high as normal,” he explains. For an advertiser buying radio spots, that extra audience could be a significant added value.

The research company also tracks repetitive audience behavior to identify listening patterns during

the day. “We found the resilience of an audience through a commercial break can be amazing,” Generali says. “During the morning drive, we found the audience gets bigger during a commercial break. That occurs because the inflow of new listeners outpaces the natural churn during a commercial break. That finding certainly runs counter to the accepted wisdom.”

Tracking audience patterns also helps program directors develop strategies for teases and listener contests, Generali adds. “Thanks to granular data measurement, we can help design a better mousetrap to keep the audience around.”

## Anywhere, anytime

Because mobile is a new marketing vehicle for many brands, marketers must pay close attention to those evolving research tools and methodologies. “Getting a handle on the basics of mobile analytics is a foundational step in maximizing your return from this fast-growing digital marketing channel,” says Eric Rickson, director of mobile analytics at Webtrends.

First, Rickson says, brands should look at the objectives of their mobile media strategy—thinking about how customers will engage in the activities provided by a mobile application over time. Reading breaking news, finding a restaurant, booking a flight, finding a doctor, checking a balance, paying a bill or reporting an auto accident will naturally have different frequencies of use, he says.

In a mobile world—even more than on the Web—brands need to provide tight relevant experiences to keep people coming back. “A Web site can offer 1,000 different things to a user, but in mobile, you have to focus on just what is relevant to the consumer’s needs,” Rickson says. “That means providing high-value content so the audience keeps coming back.”

In any case, it is essential to connect a measurement strategy back to the brand’s business objectives. “Don’t let vital lessons that took years to learn on the Web risk being neglected as the mobile channel grows in importance. You should be thinking about how to measure your mobile channel’s effectiveness now in the context of all your digital channels.”



**Philippe Generali**  
Media Monitors



**Larry Rosin**  
Edison Research

## What's next

In 2010, audience research and measurement is taking some intriguing new paths, from do-it-yourself (DIY) surveys to sophisticated biometric studies.

"With the advent of online and DIY research, the gatekeeping role of the market research firm is gone forever," notes Bo Mattsson, CEO of Cint AB, a Swedish software company that develops online research products.

"If companies can do the easier parts of market research themselves, this will create room for using more time and resources on the hard-to-reach insights that will continue to require specialized expertise."

One of the emerging research options is the use of biometrics to provide automated, quantifiable data about consumer responses rather than self-reported information—which enhances

the quality of research results. "A participant would wear a vest that tracks the body's biorhythms and reactions when programs or commercials come on," says Gugel of the ARF. "Because this would multiply the data points, it should be possible to generalize from a relatively small sample."

In any case, Rosin of Edison Research believes the pace of change in audience

research will continue to increase, just as it has in media consumption. "In the last four years alone, we've had the rise of the iPhone, YouTube and Facebook, which has almost become a new form of media. Even Apple didn't understand initially what an app store would look like, let alone become a business in its own right. Those types of surprises will keep happening in the future." ■

## The DIY channel

All around the world, marketers are conducting consumer surveys online, often using do-it-yourself (DIY) tools. "Typical examples would be product or concept tests containing 10 to 15 questions," says Bo Mattsson, CEO of Cint AB. "Marketers who want a quick assessment on whether a new product or business idea is viable, find a target group or learn more about the competition can do surveys themselves, directly from their desktops."

Mattsson cites a recent report from ESOMAR, an Amsterdam-based global research organization, that shows about 21 percent of research in the U.S. is now done online. "From our online perspective, we think PR agencies are using research more to gather data and prepare interesting content for campaigns," he says.

However, marketers must be careful to avoid mistakes when designing their own surveys. "One of the most frequent errors is to presume that the respondents are familiar with the product or service or the language used in the questionnaire," he says. "If you want reliable answers, an average consumer needs to be addressed in a familiar way with a friendly approach."

All too often, he adds, in-house researchers tend to prompt respondents to give "correct" answers, and the respondents usually comply. "When this happens, there is a risk that the data won't be reliable and won't reflect the real product positioning and brand recognition," he says.



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# Best practices for desktop surveys

## Cint Direct Sample gives marketers control from start to finish

By **Bo Mattsson**  
CEO, Cint AB



DIY research sites such as SurveyGizmo and SurveyPirate are becoming more and more sophisticated, but are they a viable alternative to an insight agency? So

far, discussion around the use of these sites has not included the voice of the CMO client or research end user. With this in mind, Cint undertook a qualitative research study in the U.S., the UK and Germany with end clients and professional researchers.

The findings show a high demand and enthusiasm for DIY tools among clients—for many, it is seen as a “no brainer,” given the current business environment. They expressed a feeling of liberation in the discovery that they could access the views of their clients and customers so directly and easily. Comments ranged from “the sky’s the limit” to “we now do about 50% of our research ourselves—a change over the last two years.”

But in spite of this enthusiasm, clients also have realistic concerns about how best to use these tools. “The danger is that you might not be asking the right questions,” commented one. “You could risk annoying and alienating people who you are asking the questions—if you asked stupid questions,” said another.

Clients also understand and share the same concerns about panel quality as researchers: “In my experience, having a smart pool of people answering your questions is key,” said one. This issue has now been addressed with the launch of Cint Direct Sample which provides users with access to a quality sample of more than 3 million individuals in over 40 countries. Control of the whole project—from questionnaire through to fieldwork and analysis—can be in the user’s hands.

As one researcher in a large U.S.-based agency said: “This opens up lots of new possibilities.”

According to the study, the limits of survey tools are understood, but their use is growing in frequency. “We use SurveyMonkey for all the easy things when we have our own sample and if it’s quick and dirty and we need to build a survey in a day and get results back in a week,” commented one. The clients that Cint interviewed did not think they could or should do complex research by themselves. They did indeed worry about asking the right questions, getting the right sample and understanding the results. Most saw a clear role for professional researchers to help with these issues.

### Guidelines for DIY research

As with any other area of business, clients recognize when they need help and do not automatically assume that they are research experts. Here are some guidelines for how to approach DIY research projects:

- Set a clear hypothesis and know exactly what you want to do with the information you seek
- K.I.S.S. x2 (keep it simple, keep it short)

- Use a site that adheres to industry standards/guidelines
- Get your sample right and check the quality of your sample
- Work out exactly how you want your data delivered and get it delivered in the way you want
- Don’t rush your analysis and thinking
- Know when to get advice from a professional

The potential for a bad research experience always exists, whether using DIY or an agency. Clients are not going to abandon market research if they get a “bad” survey, through whatever means. They know their business; they are able to make rational decisions and understand when they need help.

What DIY should create is more opportunities to conduct research and make the process more affordable and accessible. This will widen the boundaries and arguably lead to better exposure to market research and its value. It does appear, then, that as DIY tools get better, including the use of Cint Direct Sample, the support and take-up will continue to build.

*Bo Mattsson is founder and CEO of Cint, a privately owned software company that develops online research products. To learn more, visit [www.cint.com](http://www.cint.com)*



Marketers now have access to more online research tools than ever before.

# Media measurement on the move

## Arbitron advances electronic audience measurement—again

This summer, Arbitron is unveiling its next generation in electronic audience measurement technology, extending its current audience measurement software to a wireless mobile communications platform.

This innovative approach further liberates audience measurement from the home and enables media, marketers and brands to follow the mobile consumer more closely—a capability particularly important for brands appealing to younger demographics.

### Moving Toward Emerging Mobile Platforms

By enhancing its Portable People Meter™ (PPM™) electronic measurement technology with a new meter that has cellular communications capabilities, Arbitron is creating a new path for the application to operate across emerging mobile platforms such as smartphones and netbooks.

“We’re committed to continuously improving our services, and the new meter is also more user-friendly and practical for our panelists,” says Taymoor Arshi, svp, engineering and chief technology officer. “And we gave the device a sleeker look and added a text screen.”

Arbitron’s current PPM service gathers audience information from a panel of consumers in the largest U.S. markets. These consumers carry the company’s current meter, which detects an embedded audio code in radio and television broadcasts, as well as cinema advertising and many types of place-based electronic media. By the end of 2010, Arbitron plans to be gathering audience information from approximately 70,000 consumers in 48 markets.

“Because of its unique mobility and



*Arbitron's latest advancement is designed to more easily follow today's consumers and provide a more complete picture of their media consumption.*



versatility, the PPM technology has already provided valuable insights for brands and marketers—and we expect even more from this next generation of the PPM platform,” says Pierre Bouvard, evp of cross-platform services.

### On-the-Go Audiences

Bouvard notes that the current PPM technology can measure audiences for out-of-home (OOH) TV viewing: watching a sports program at a friend’s home, viewing a news network in an airport or seeing a health show at the gym.

“From a marketer’s standpoint, every impression counts, and with the advanced PPM technology, we anticipate the ability to get an even more complete picture of media consumption, regardless of where it occurs,” Bouvard explains.

The new PPM technology is expected

to also accelerate Arbitron’s cross-platform reporting capabilities—an important factor for brands seeking to link social media and Web site traffic with radio, TV and cable audiences.

### Multitasking Audiences

“While it’s certainly important to know how many viewers listened to and watched an NBA championship game, being able to measure simultaneous use of online sports and other Web sites brings a new dimension to audience research,” Bouvard adds.

A recent cross-platform study by Arbitron and its research partners conducted for NBC Universal on the 2010 Winter Olympics showed that consumers who followed the games on television and online spent much more time on both platforms.

“Simultaneous use of Olympics on both TV and at NBC’s Olympics Web site was frequent. This suggests that a cross-platform strategy can allow an advertiser to tap into a show’s fan base, multiplying the overall impact,” concludes Bouvard.

A long-time leader in audience research technology, Arbitron is dedicated to finding innovative and efficient ways to collect audience data. As Arshi puts it, “By compressing the time between data collection, analysis and reporting, we are working toward being able to provide vital audience data in near real time, helping our clients develop effective media strategies and boost their marketing returns.”

*Arbitron Inc. (NYSE: ARB) is a leading media and marketing research firm. For more information, visit [www.arbitron.com](http://www.arbitron.com)*

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# Strategies for measuring mobile investment

## Webtrends launches smartphone analytics solution

Today, many brands are racing to invest in the mobile channel without a clear strategy. As a result, they are finding it difficult to determine if their marketing and advertising dollars are paying off.

“Given the amount of focus and increasing share of budgets being spent on mobile, I am surprised at how little strategy appears to sit behind these investments,” says Eric Rickson, director of mobile analytics at Webtrends, a leading enterprise customer intelligence company based in Portland, Ore. “After all, having clear goals and objectives is the first step in being able to quantify your results, especially with a cross-channel digital strategy.”

Many marketers are facing top-down pressure from the C-suite to connect with smartphone users through downloadable applications, as well as text, video and mobile Web campaigns. Meanwhile, there’s a bottom-up drive from developers to create “cool” new apps that may achieve novelty but fail to provide an ongoing value to users.

“Those forces are pushing marketers to get a smartphone app to market without thinking about the audience, the strategy or the right set of mobile tactics,” says Rickson. “And there are as many ways to reach a consumer through the mobile device as in the digital channel. Many brands have not yet determined how to include mobile in a cross-channel strategy.”

Webtrends, which helped establish the web analytics industry in 1993, recently launched its mobile analytics solution to help clients understand and increase the value from their mobile sites and apps. That process starts with asking the right questions: Is this the right audience for the app? Will consumers use it over time? From the brand’s perspective, will consumers use it for high-value activities?

“If you are in the planning phase, think about the characteristics of the audience you are trying to reach and what you can distinctively offer them in an app,” he says. “If you have an app already in the



Eric Rickson

*Will consumers use your app for activities that benefit your brand? Webtrends' new mobile analytics solution can help answer that question.*

market, think about how you offer activities within that app to generate revenue, provide cost savings or increase brand

engagement. The results should also be mapped to reflect the audience’s interaction with these activities.”

For example, Fandango, an online movie ticket service, developed an app that provides movie and theater information and allows consumers to buy tickets from a mobile phone. As a result, about 20 percent of the company’s advance movie sales on weekends is now coming from the mobile channel, according to Rickson.

“Taking app measurement to this level is a critical step in being able to demonstrate the business value you are getting from your app investments,” he explains. “Simply relying on the number of downloads to demonstrate success of an app does not provide the right metric for marketers seeking to improve the channel’s return on investment.”

To determine user engagement and loyalty, for example, Webtrends can measure frequency of visits (using the app), depth of visit (number of screens viewed) and duration (time spent in the app).

“The canvas in the mobile world is still small so you want to make that real estate as interesting and useful to your audience as possible,” Rickson adds. “If it isn’t useful, people won’t use it.”

In the ecosystem of user touch points, Webtrends focuses on the destinations. “Within the mobile space, we provide insight into how brands are attracting consumers to their Web sites and native apps such as those for the iPhone, BlackBerry and Android,” he explains. “That allows our clients to determine if they are achieving their original goals and answering the question: How did my investment in mobile pay off in relation to my total digital spend?”

Webtrends helps organizations realize a competitive advantage by providing insight-driven optimization of their digital channels, including Web sites, social media and paid-search advertising. Companies like 3M, Microsoft, Toyota, The Coca-Cola Company, The New York Times and General Mills rely on Webtrends’ technology, consulting services and industry expertise, including measurement, optimization and integration of all digital content and customer intelligence.

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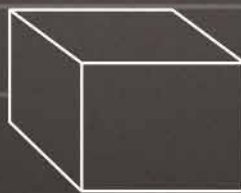
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