

Disruptive tech and evolving media use call for hybrid measurements

EMRO Cascais 2022

10.05.22

Knut-Arne Futsæter, Kantar



Agenda

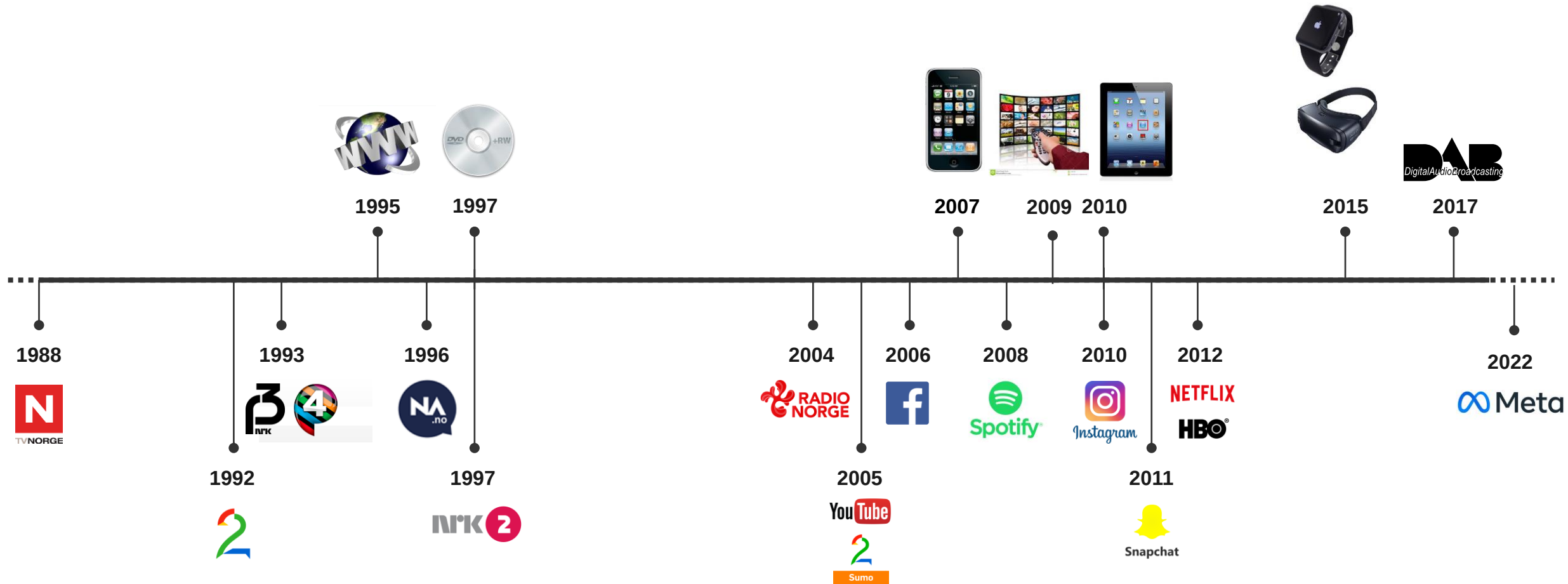


1. Introduction
2. Print & online
3. TV & video
4. Radio & audio
5. Cross Media Measurements
6. Future perspectives

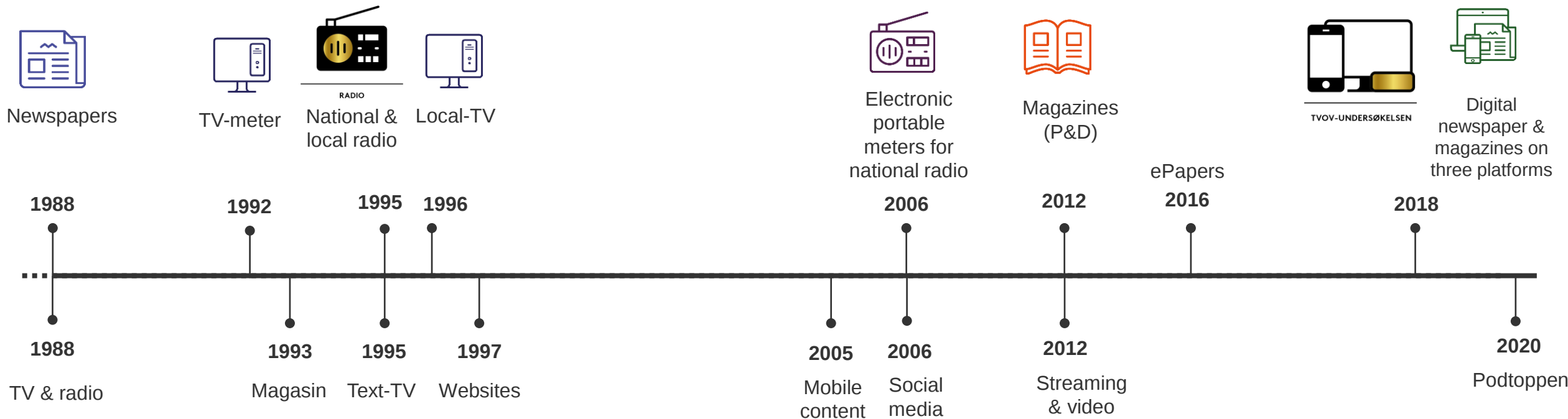
1. Introduction:

A journey of developing new measurements

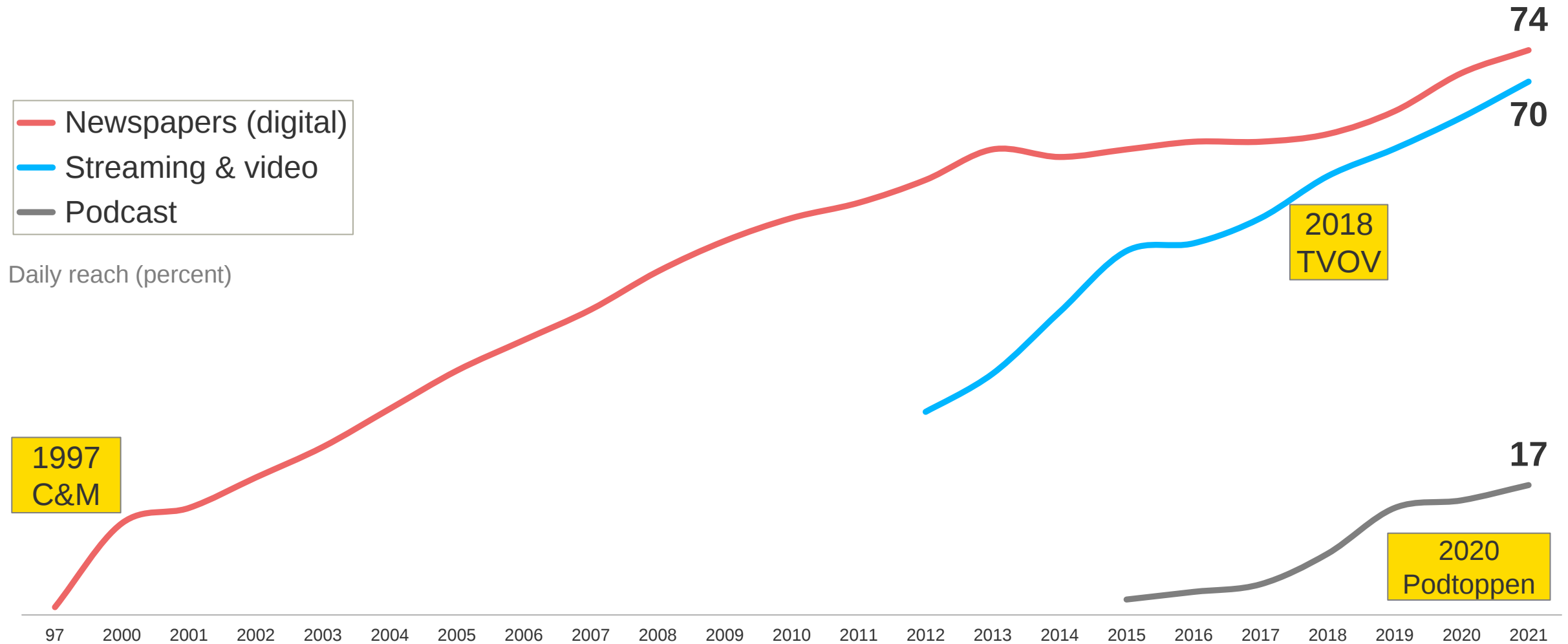
The evolving media landscape 1988 - 2022: *From linear TV to Facebook's Metaverse*



The multi-media survey C&M has been the first to measure new media and platforms: *And if you know your history*



C&M has inspired to develop channel specific currency measurements



2. Print & digital

A journey of changing methods for digital measurement

 **The Internet in Norway**
*Methods
The market
Electronic newspapers*

EMRO meeting 1997, Spain 11 June 1997.

Helge Holbæk-Hansen Norwegian Newspaper Publishers' Association <http://www.nal.no>
Knut-Arne Futsæter, Norsk Gallup Institutt A/S <http://www.gallup.no>

**The new online measurement in Norway:
A journey of changing demands and
methods**

Bordeaux, France 22.05.19
Knut-Arne Futsæter, Kantar
Bente Håvimb, Mediebedriftene





***From FRY to Recent Reading:
Newspaper measurement in Norway***

EMRO meeting 15 May 2000, Sorrento, Italy

Helge Holbæk-Hansen, Norwegian Newspaper Publishers' Association: helge.holbaek@nal.no
Knut-Arne Futsæter, Norsk Gallup Institutt A/S: knutarne@gallup.no

 <http://www.gallup.no/menue/media>

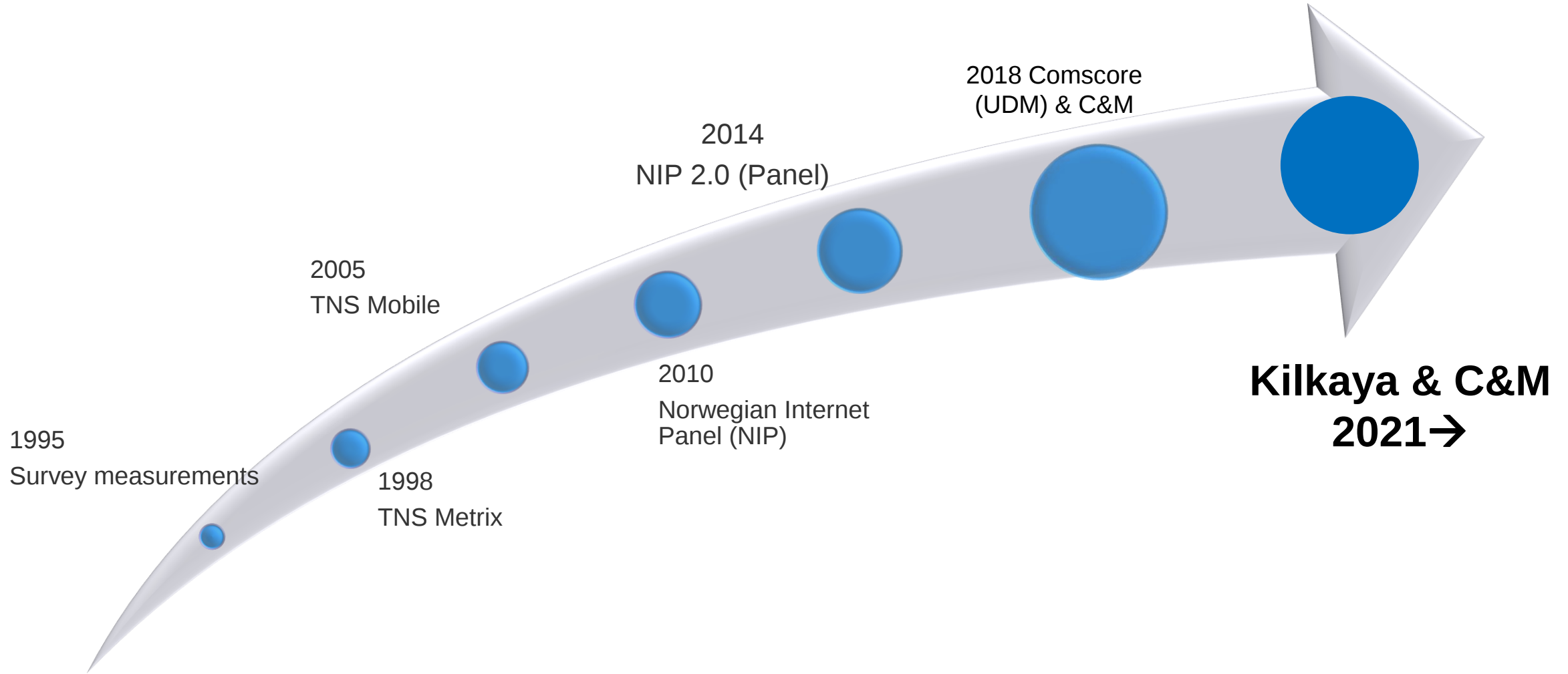
**The New
Magazine Survey
in Norway**

Jo Brun Egmont
Knut-Arne Futsæter (@Futsaeter)
EMRO Meeting 10.06.12, Brighton

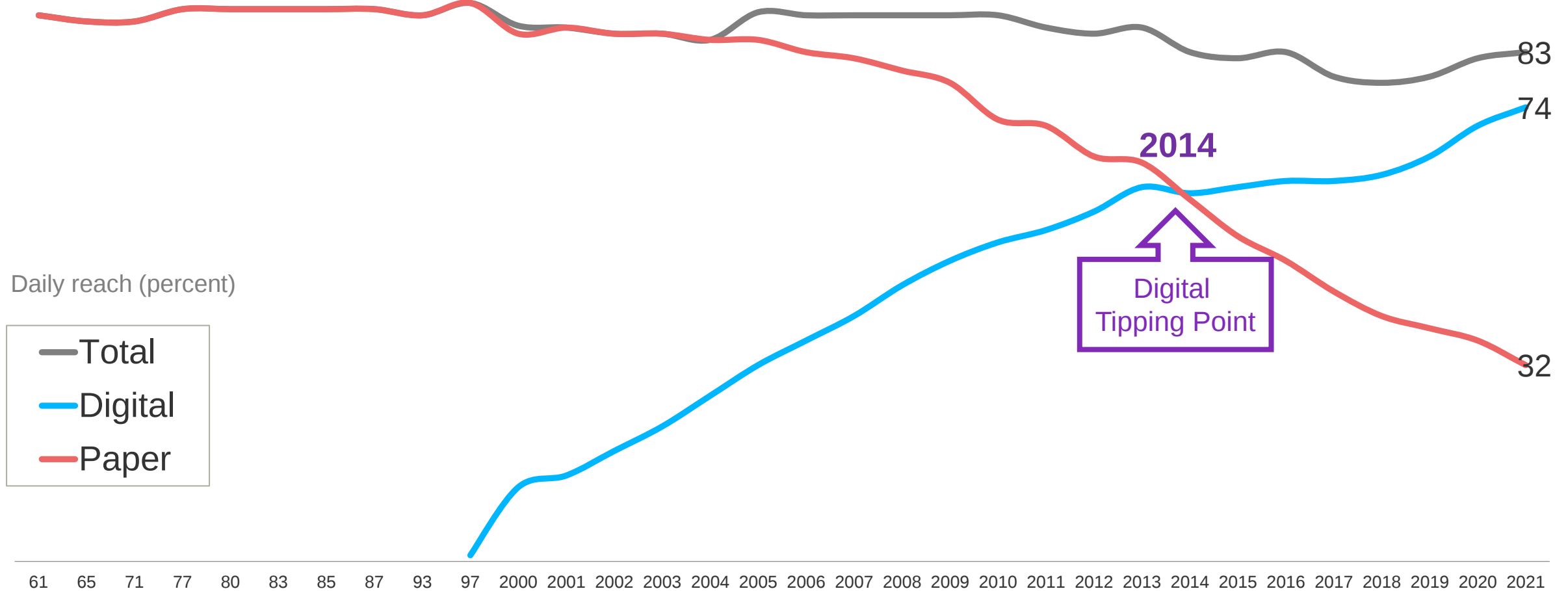




Internet measurement 1996 - 2022

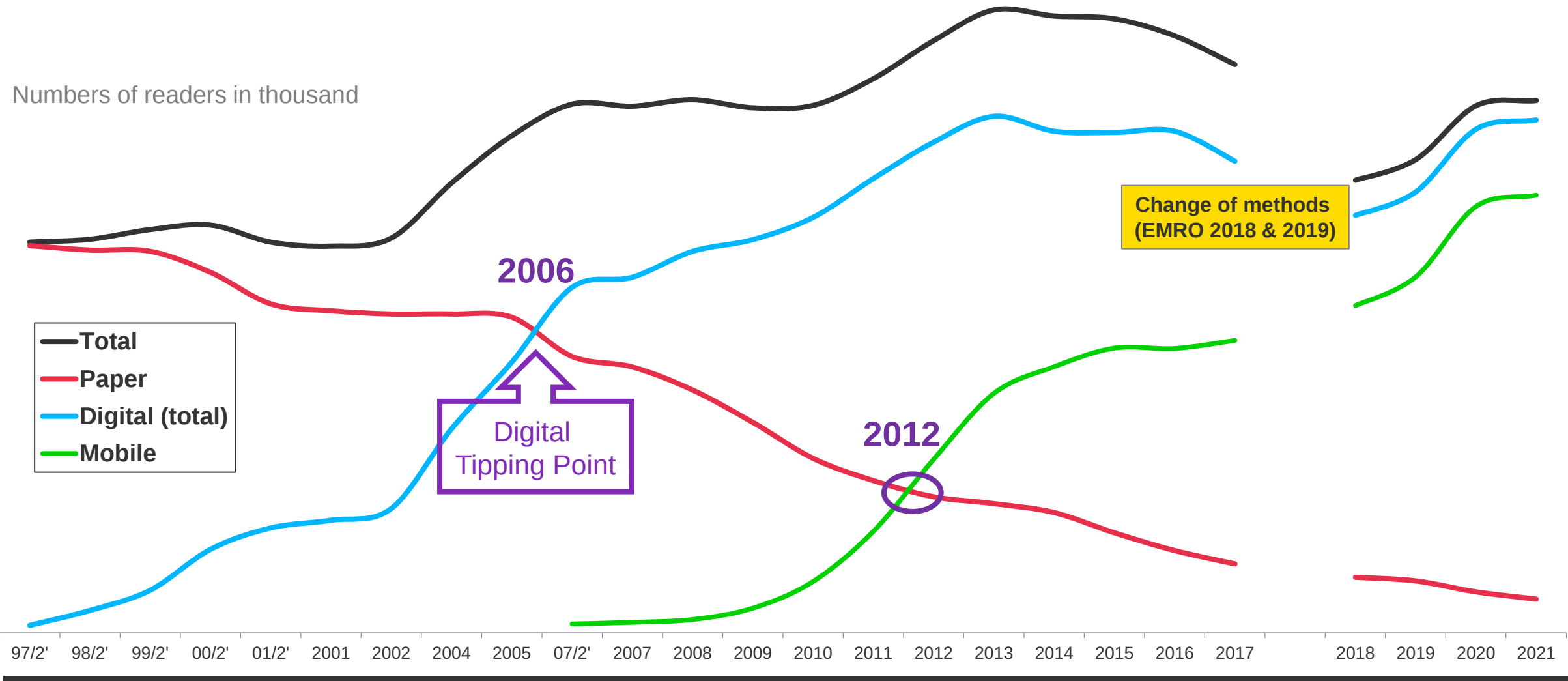


The Norwegian newspaper industry was among the first in the world to start the digital transformation

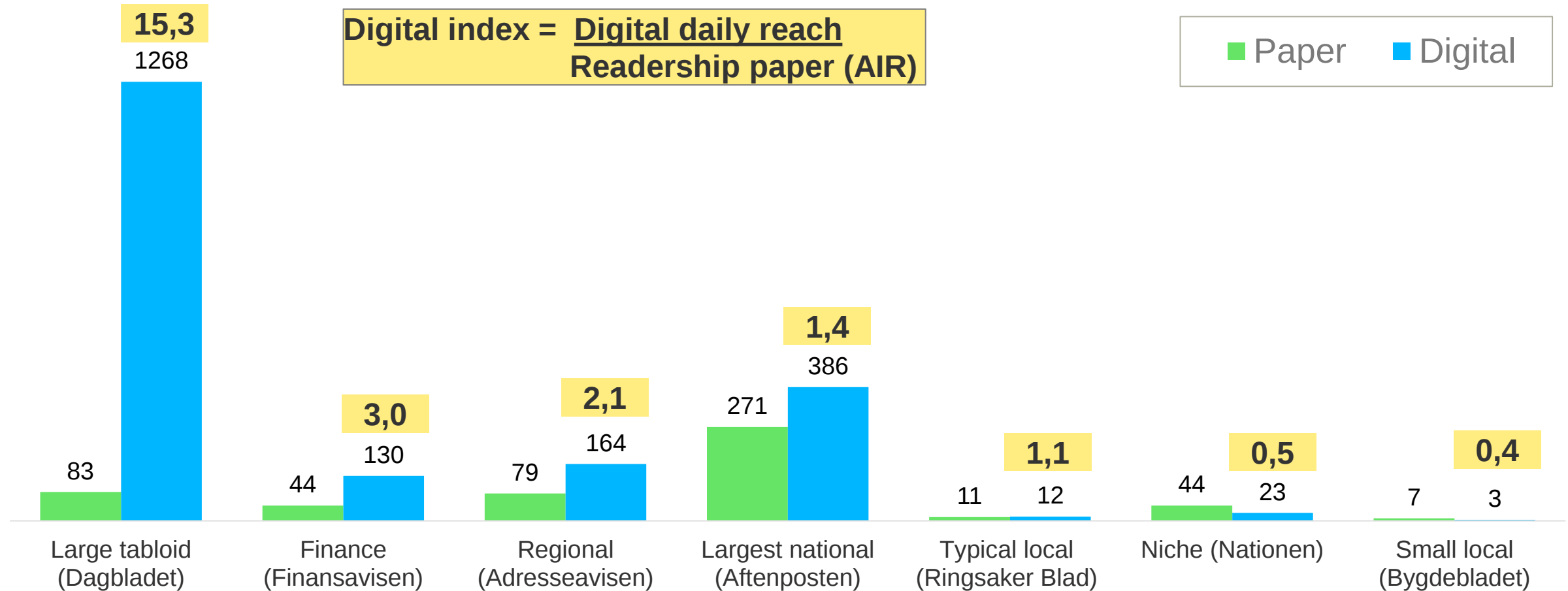


Dagbladet's digital journey

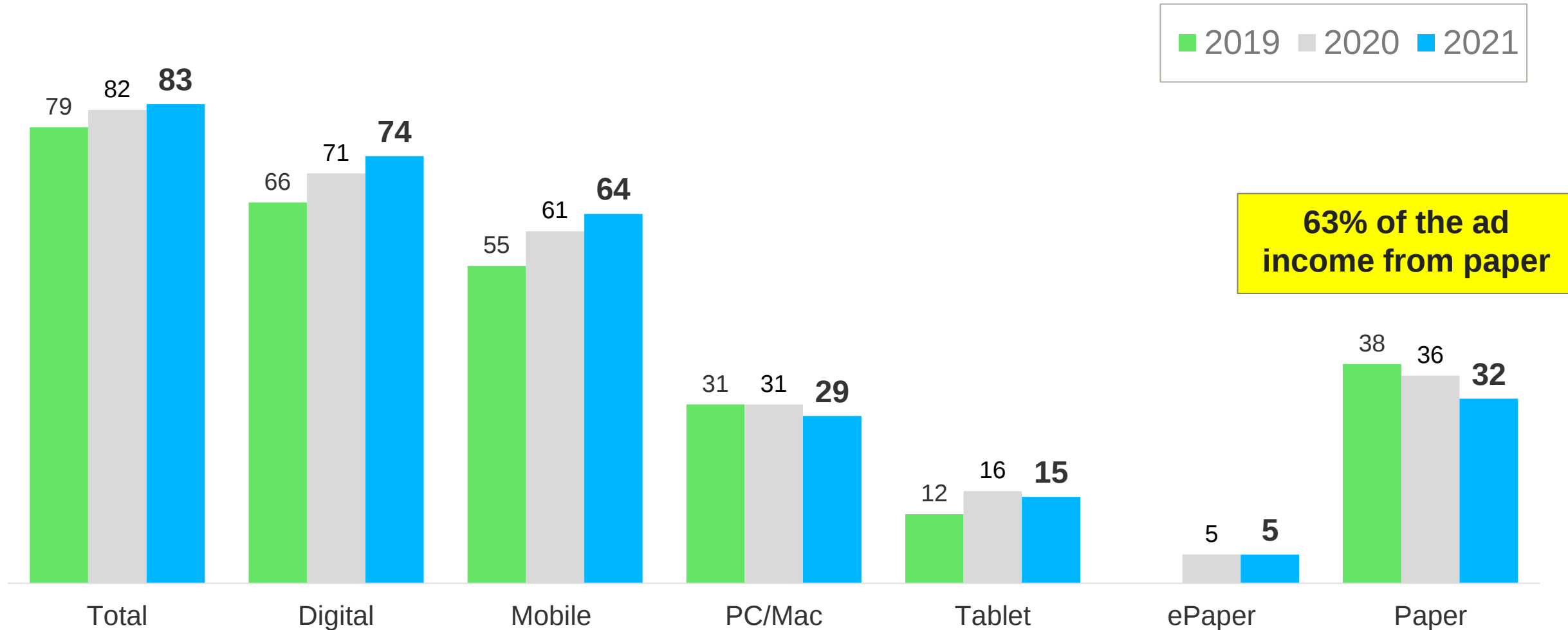
Numbers of readers in thousand



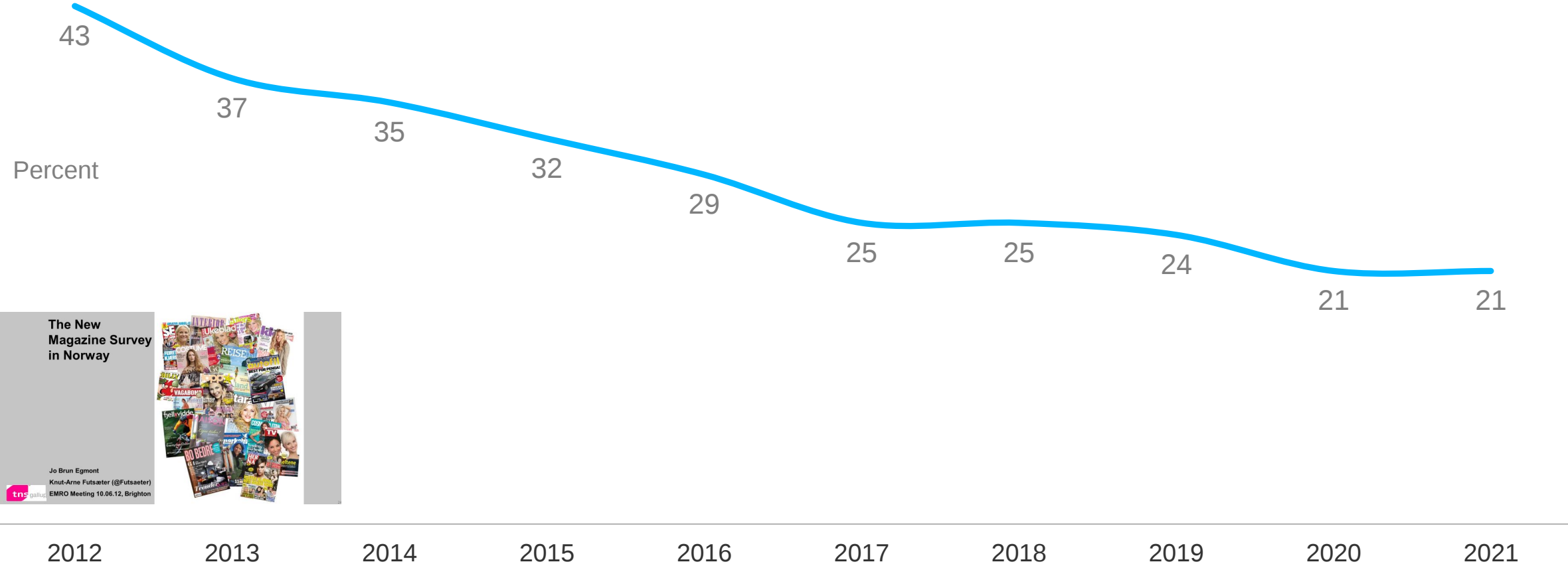
The digital transformation varies a lot between papers



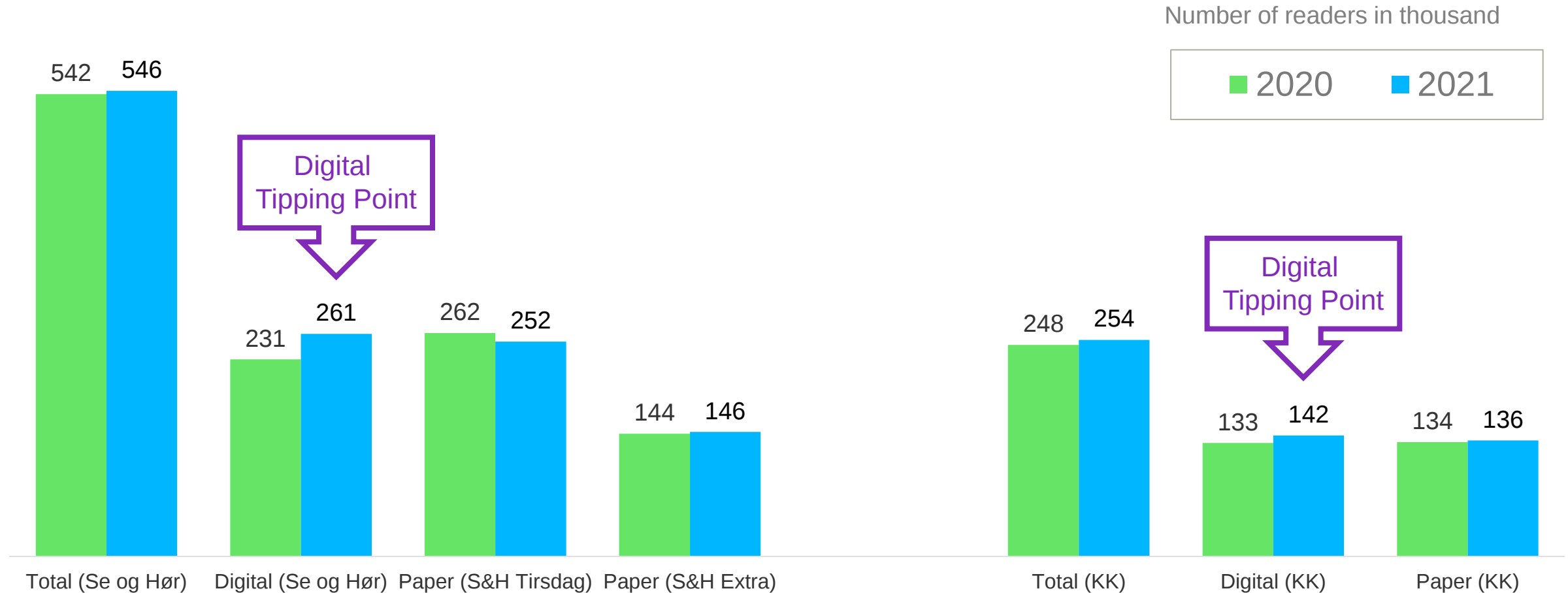
The digital transformation accelerated during the corona pandemic



Decline in daily reach for paper magazines



The magazine industry has just started the digital transformation, but



3. TV & video:

From linear TV to the streaming wars

KANTAR MEDIA



The new TVOV measurement in Norway

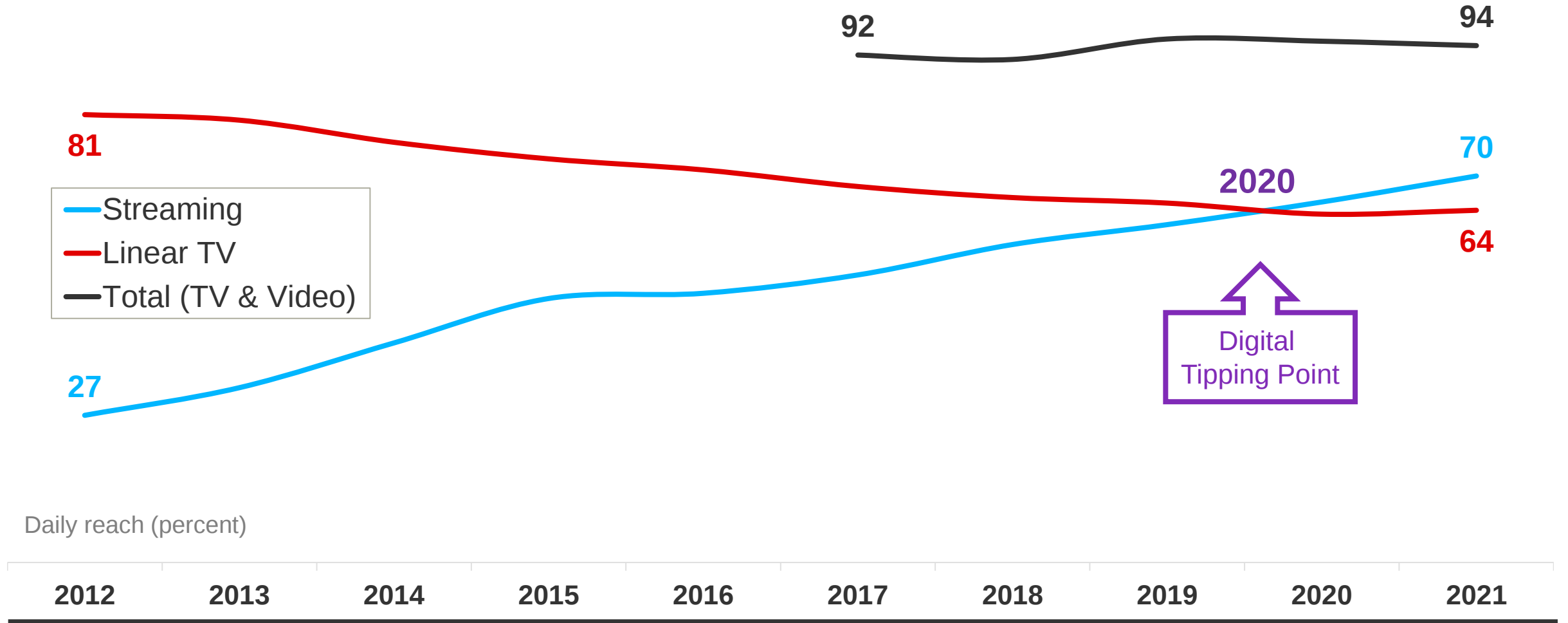
EMRO 2018
Brno, Czech Republic 28.05.18
Knut-Arne Futsæter Kantar Media
@futsaeter

TVOV in Norway: *Measuring all screens and VOD*

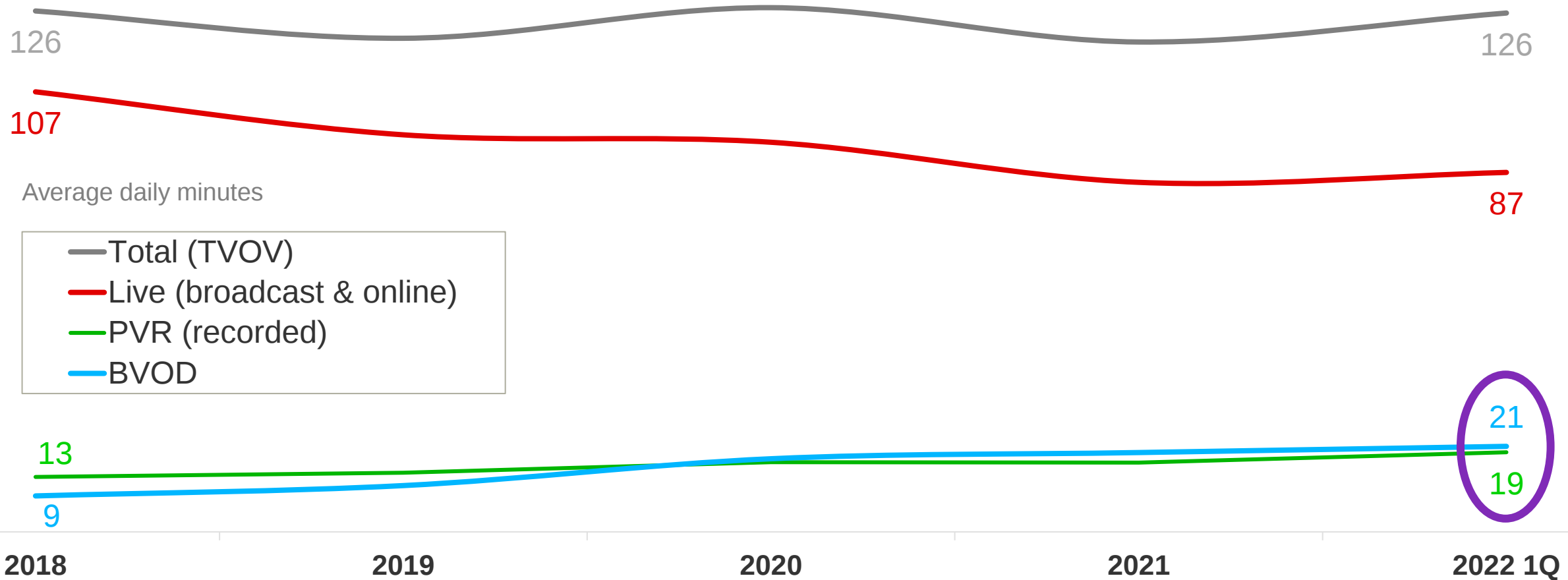
Bordeaux, France 22.05.19
Knut-Arne Futsæter, Kantar



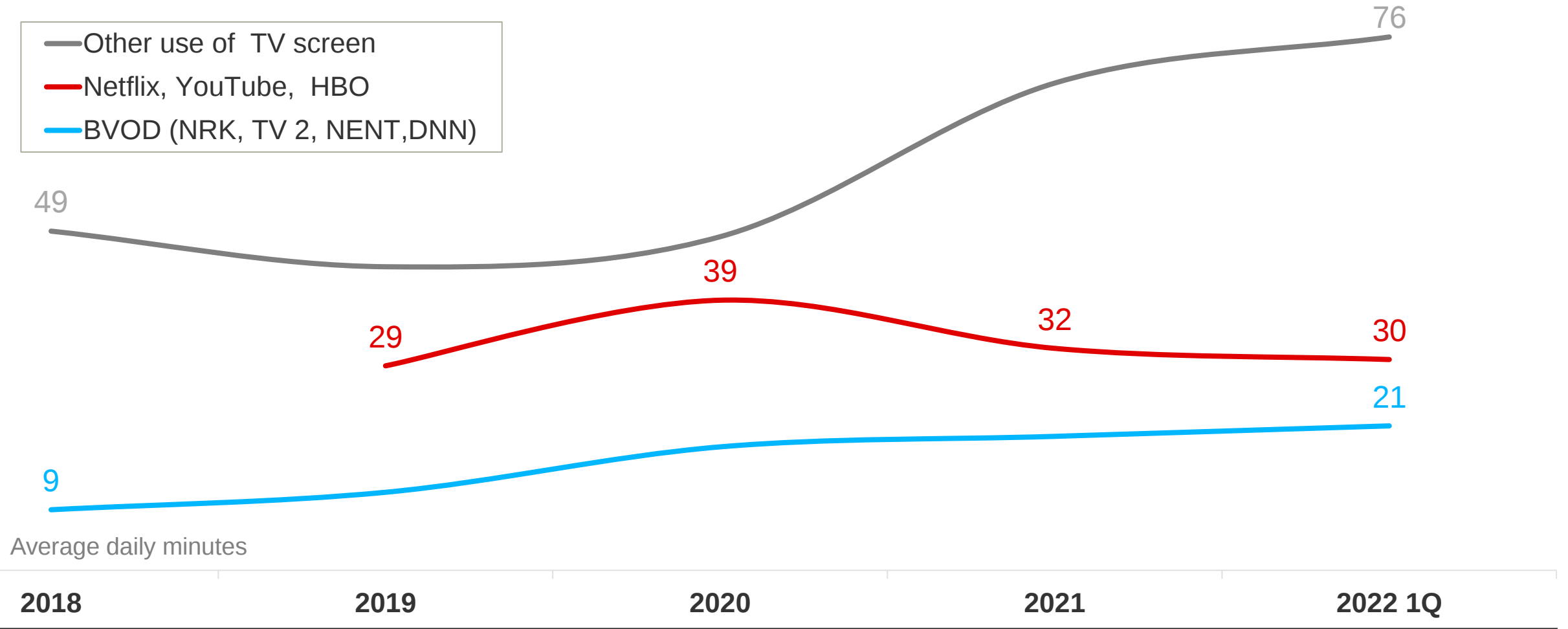
Linear TV decreases while streaming increases



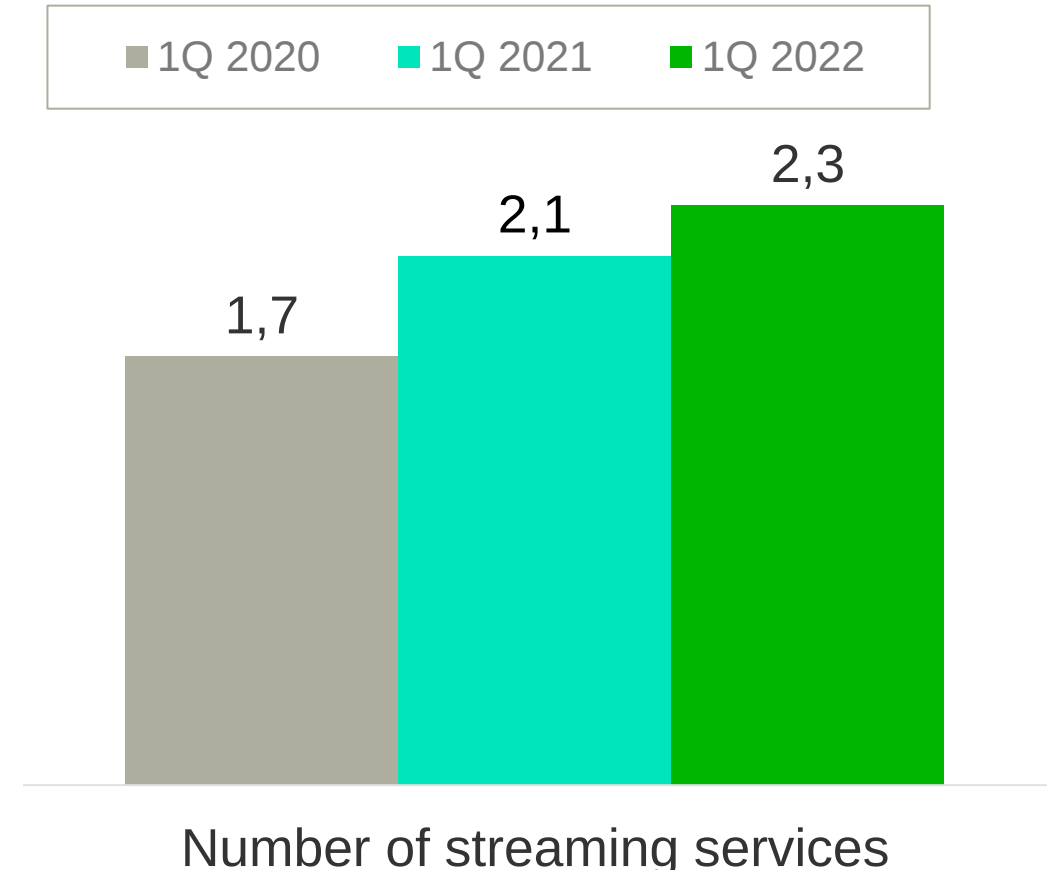
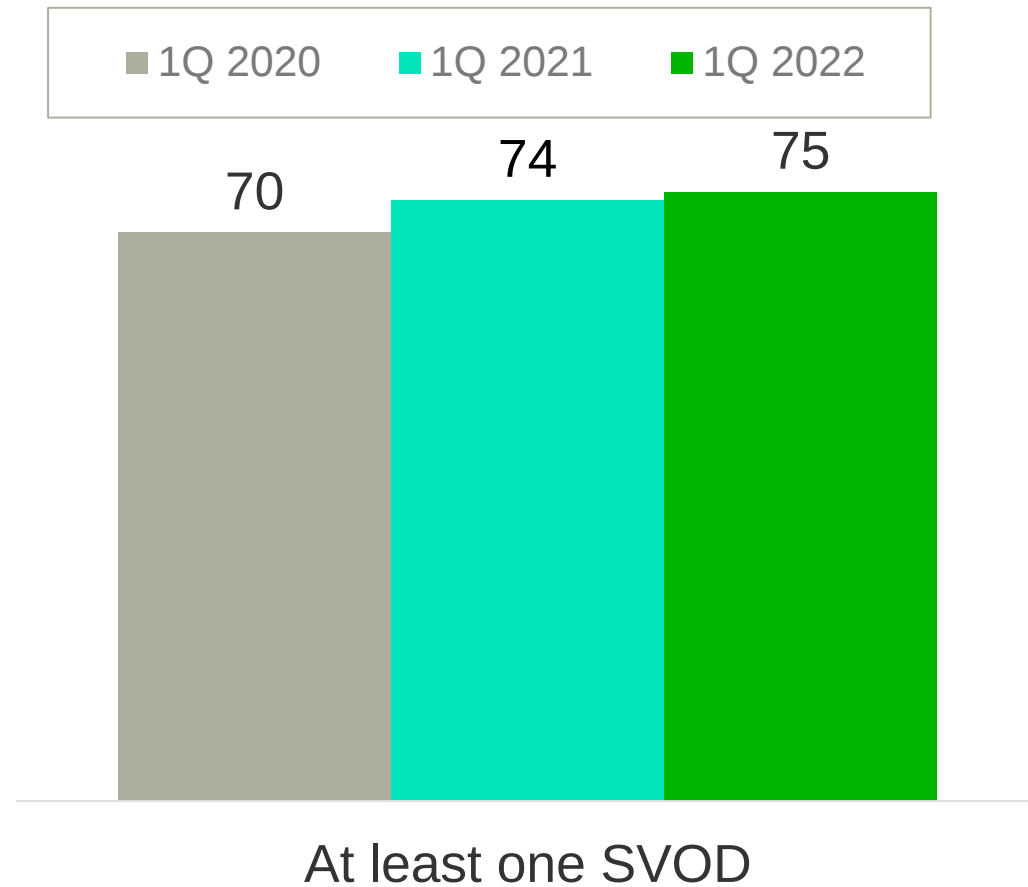
Time spent on live TV declines, while time spent on BVOD is increasing



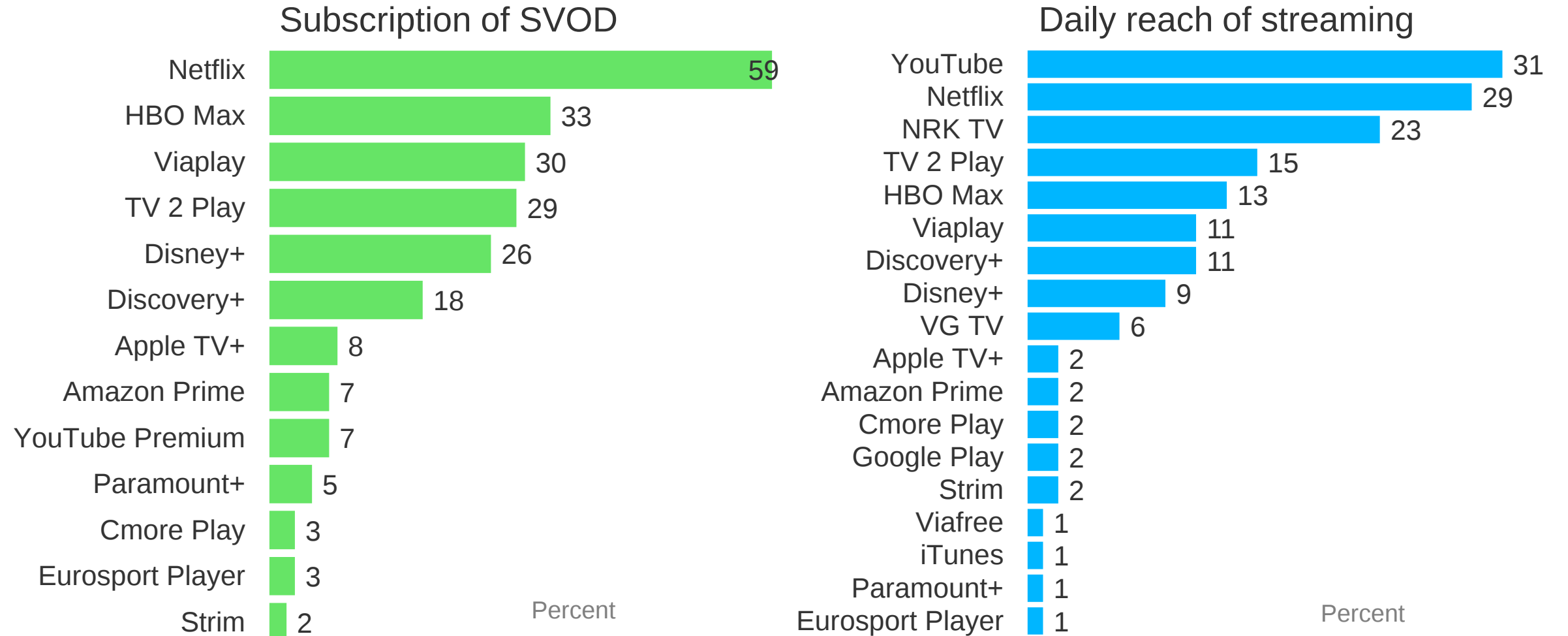
Netflix, YouTube & HBO declines, while BVOD increases



More and more people have access to SVOD



More subscribers (SVOD) and high daily use



4. Radio & audio:

From CATI to Podtoppen

Call for development of multiple methods in radio research: A review

<http://www.gallup.no/menu/media>

EMRO meeting 18 May 1999, Voss, Norway

Sissel Lund, Head of research at Norwegian Broadcasting Corporation: sissel.lund@nrk.no
Knut-Arne Futsæter, Norsk Gallup Institutt A/S: knutarne@gallup.no



From CATI to PPM

EMRO meeting May 2006, Tallinn, Estonia

Knut-Arne Futsæter TNS Gallup Norway

KANTAR TNS

The world's first FM switch off: Measurements & listening

EMRO Meeting in Luzern 23.05.17
Knut-Arne Futsæter Kantar TNS

@Futsaeter



KANTAR MEDIA

KANTAR

Measuring and reporting podcast in an increasing fragmented media landscape

EMRO 2021 WEBINAR
05.10.21

Knut-Arne Futsæter, Kantar

EMRO



Norway becomes world's first country to switch off FM radio

Oslo will roll out a digital-only service over the course of the year in a bid to save 200 million krone (£19 million) a year

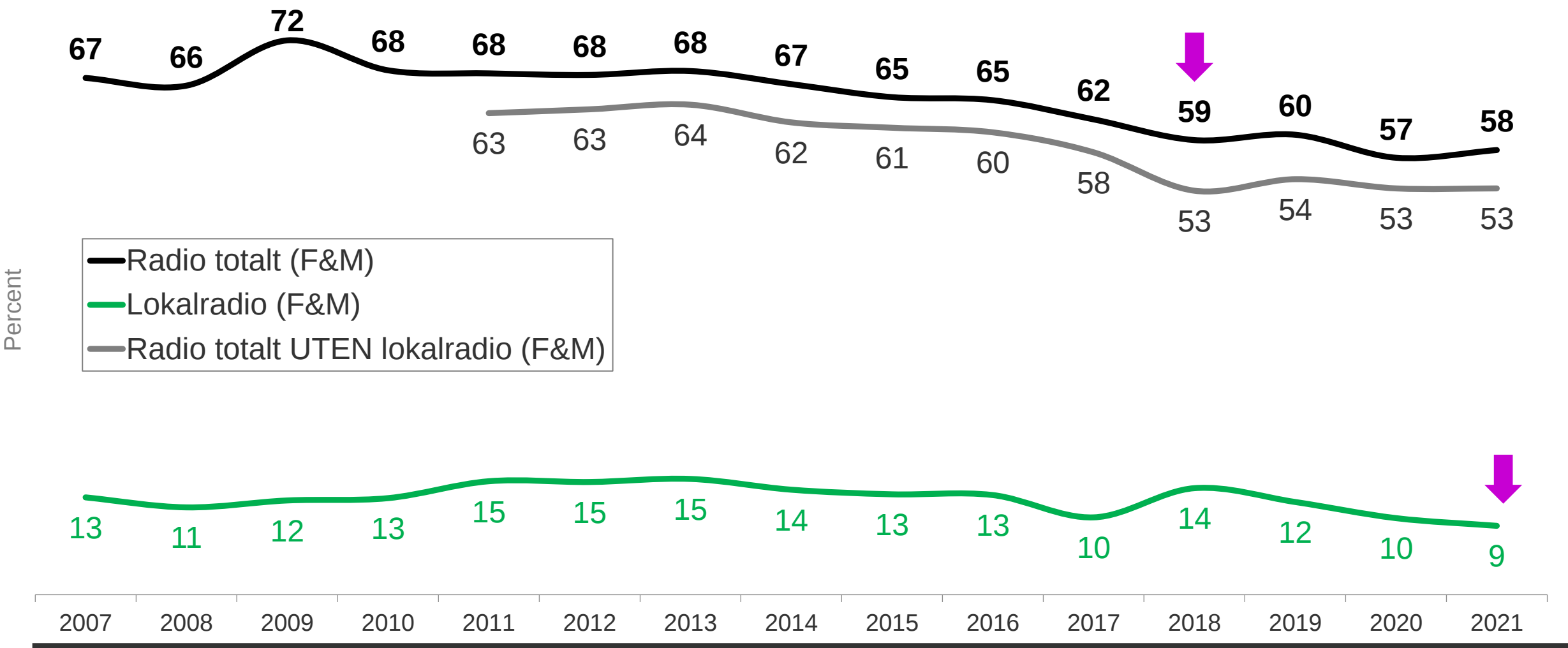
Norway makes radio history

'New golden age' of (digital) radio heralds review that could end FM

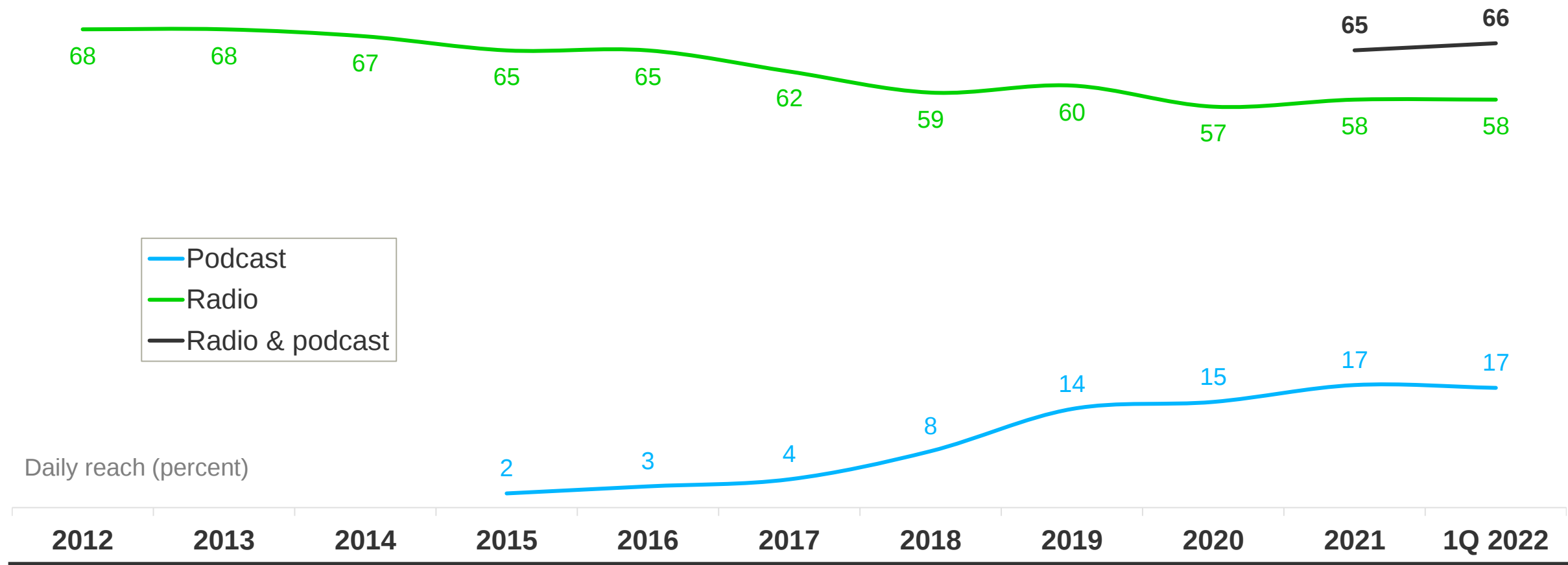
Norway to become first nation to switch off FM radio in shift to digital



Decline in listening after the digitalisation in 2017



Podcasts increase the consumption of total audio



Advantages and disadvantages of different methods



Survey measurement (Consumer & Media)

- **Persons**
- Demographics
- Use of other media and audio
- Total reach for audio (radio & podcast)
- Target group data (TGI)
- Depends on people's memory
- **Low level of detail**
- **Limited with metrics**
- Slow reporting frequency

Traffic measurement (server logs)

- **Not persons**
- No demographic
- No other use of media or audio
- No target group data
- **Measure downloads - not usage**
- **High level of detail**
- Some metrics
- **High reporting frequency**

Electronic audio panels (RateOnAir)

- **Persons (sample size & costs)**
- Demographics
- Use of video and audio
- TGI could be fused in
- Don't depend on people's memory
- **High level of detail**
- **Granularity depends on sample size**
- High reporting frequency
- **Headphones**

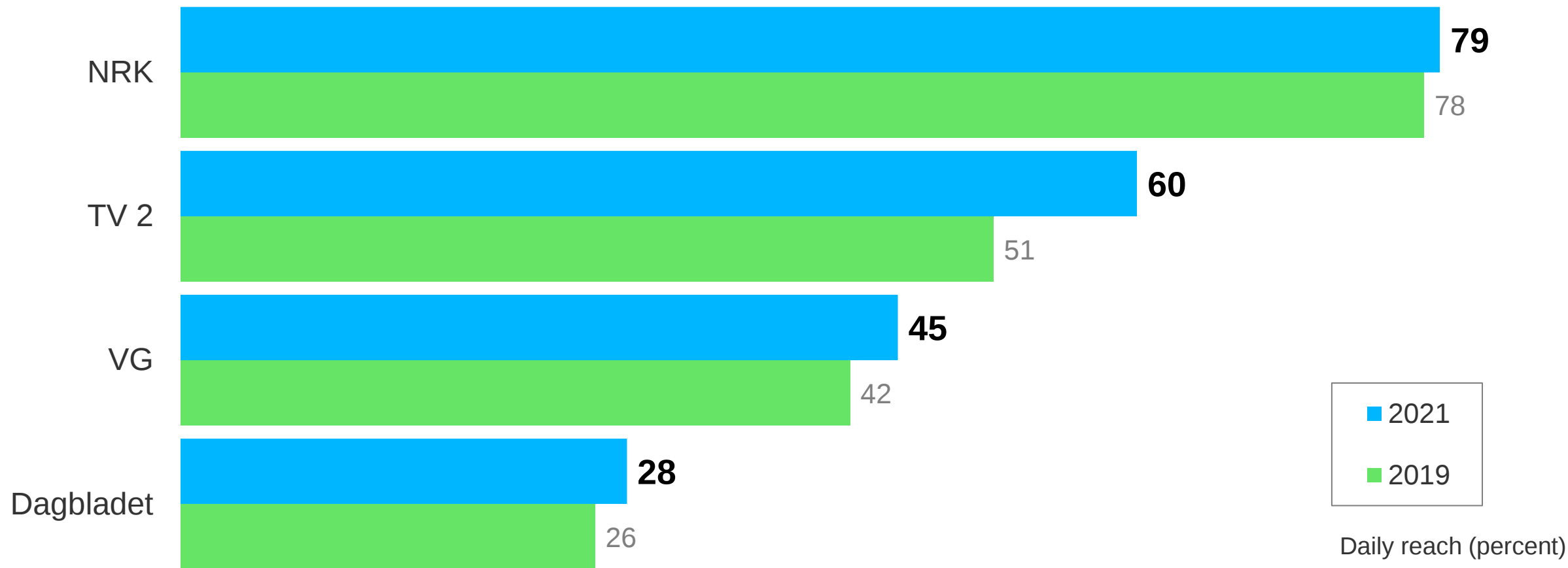
5. Cross Media Measurements:

Strategical analysis, media planning and verification

Cross Media Measurements

- A long and winding road
- TVOV has the potential to measure all sorts of streaming and video content even from the walled gardens
- Consumer & Media gives strategic insights for media owners and agencies based on traditional surveys

The Norwegian media strengthened their position during the corona pandemic



The three largest media companies in Norway have a total digital daily reach of 78%

Schibsted
62%

Amedia
40%

Schibsted, Aller or Amedia:
78%

Aller Media
35%

Exclusive reach
Schibsted
895.309

Duplicated reach
Sch. & Amedia
559.771

Exclusive reach
Amedia
365.458

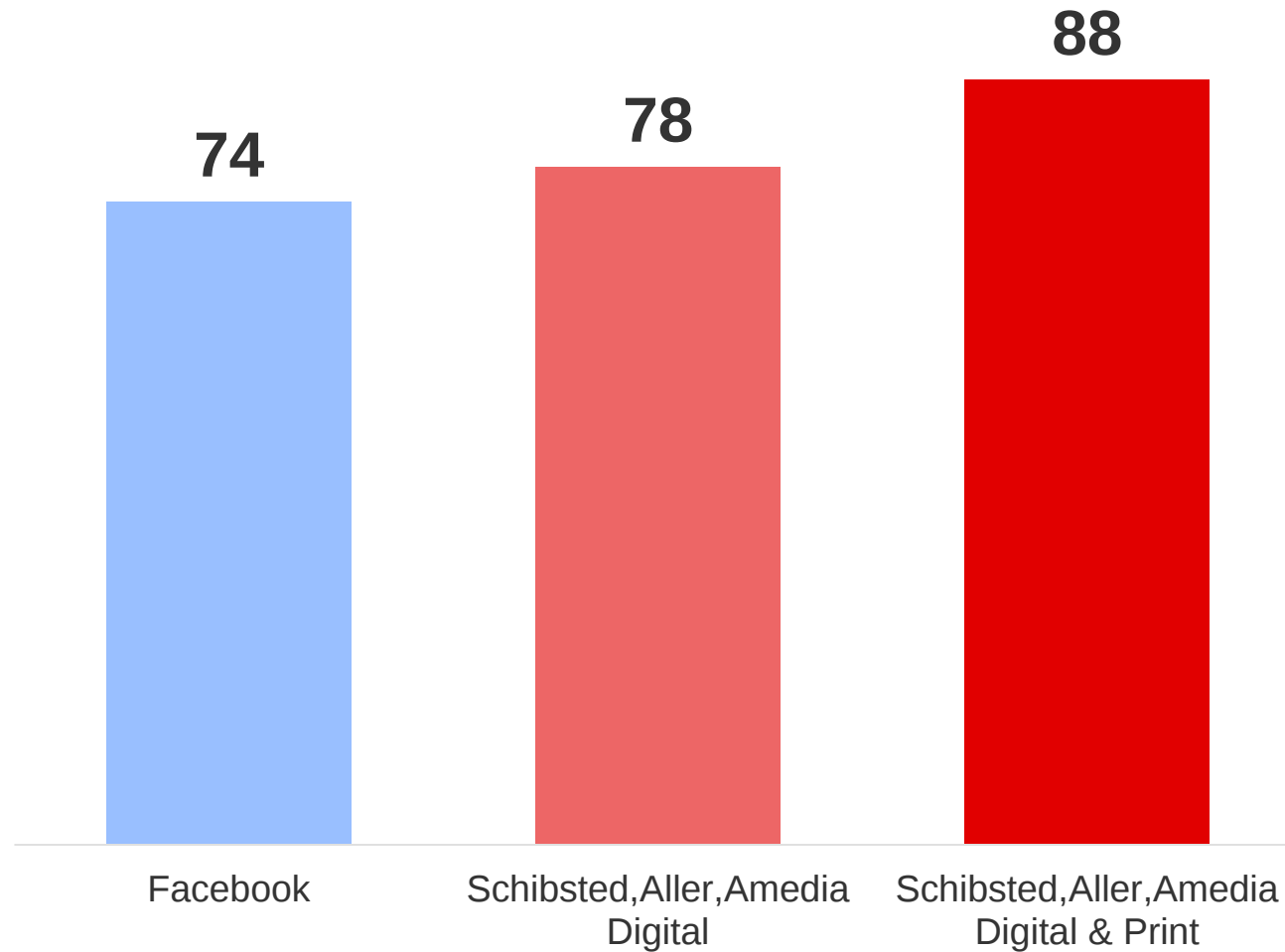
Triple reach
655.815

Duplicated reach
Sch. & Aller
532.842

Duplicated reach
Amedia & Aller
148.810

Exclusive reach
Aller Media
175.578

The three media houses have a higher reach than Facebook



6. Summary and future perspectives

Hybrid measurements is the future

TV & video

- TV: TVOV with two panels, multiple technologies, census data and data integration.
- Streaming: TVOV, CAWI (integrated in C&M)

Radio & audio:

- Nation radio: Electronic portable panel
- Local radio (CATI) and multi-media (CAWI)
- Podcast: CATI (integrated in C&M), serverlogs (Podtoppen)

Print & digital

- Newspaper: CATI
- Magazines: CAWI
- Digital: Census & C2P, CATI/CAWI (C&M)

Other media

- Outdoor, social media, eSport, gaming, influencer, etc. (C&M CAWI)

Lessons learnt

- **It is crucial to measure new media and platforms as early as possible in order to develop and establish official currency for new media.**
- **All new measurement need some kind of benchmark and a back-up in case of unforeseen events (Covid, third-party cookies etc.).**
- **Be in forefront of developing and changing methods.**