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An Academic View

As part of the AMPS proofing programme, a review as made of the relevant academic literature.

Media Adoption

When Rogers' (1962) theory on the diffusion of innovations was applied to media, Stöber (2012, pp.493, 494), commenting on research on diffusion, concluded that the early adopters of new media tend to be young, with higher levels of education and income. The various stages of acceptance of new media: Innovators, Early adopters, Early majority, Late majority and Lingers are shown in Figure 1 together with sales. Stöber warns however that since diffusion occurs through time, the normal distribution does not apply and the phases would not be of equal length. Experience has borne this out with television, radio and new media following different patterns and television in particular not becoming less popular but more fragmented.

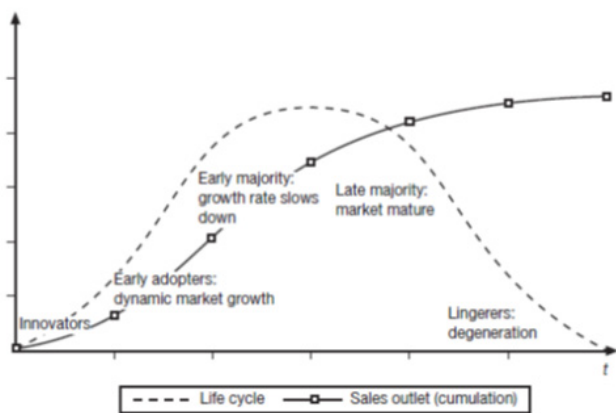


Figure 1: The life cycle of new media in the diffusion phase
Source: Stöber (2012, p.494)

Television Historical Perspective

Sharp, Beal & Collins (2003, pp.211-2, 215, 218) contrasted the audience of yesteryear with that of today. At the start of television the family life centred on the TV set. Housewives viewed the “mid-day soap operas”, children watched TV after school, or at weekends and adults would gather around the set for their favourite programmes, occasionally at meal-times. Television advertisers were thus able to reach a large proportion of their target markets in a short time period. Based on channel reach for New York, in 1976 & 2002, the UK in 1987 and 2001 and Australia 2008, the authors came to the conclusion that whilst television still had very high reach this had been fragmented by a far greater number of channels together with the move to digital. The total television audience had not declined, but ratings had. A “double jeopardy” was evident in that larger channels had more viewers, who watch more. It was found that the television audience has an unusual distribution in that a few people are very heavy users, but the majority watch less than the average. This has implications for TV scheduling in that “it is perfectly possible to buy a TV schedule that delivers low reach per dollar.”

The Decline of Mass Media

Joachimsthaler & Aaker (1997, p.39) observed that in the United States the effectiveness of mass media advertising, which had been the “corner-stone of most brand building efforts ... is threatening to become obsolete.” In Europe mass media had also lost its effectiveness, but without a reduction in cost, resulting in companies using other channels to market their products. Soberman, cited in Naiker (2010, p.21) opined that marketers could no longer rely on prime time television to reach a large audience. Therefore “a significant portion of their budget is allocated to comprehensive media packages that include a certain number of advertising spots, sponsorships, signage, billboards, product placement and not just a 30 second spot.” A more extreme position is taken by Jaffe (2005). He considered that the 30-second television spot, which was the iconic example of the traditional media era, is in terminal decline. In support of this claim Jaffe (2005, p.49) noted that marketers can no longer dictate to customers with regard to their buying behaviour, since “the entire balance of power has shifted to the consumer.” The availability of knowledge has dramatically changed, in particular, through access to the wealth of information on the Internet and social interaction. In addition the increase in advertising has resulted in clutter which overwhelms consumers who have time constraints.

The impact of digital media only emphasises the change further. Webster & Ksiazek (2012, p.39) concurred “that patterns of consumption become more widely distributed” due to the increase in digital media. “Digital media “are those media that translate the content of media – be it images or sound – into digital code, a language of ones and zeroes.” This then “allows media content to be displayed on any number of different devices” (Sullivan, 2013, p. 216).

The ability of a new medium to compete with those already established was considered by Dimmick, Chen, & Li (2004), cited in Okazaki & Hirose, 2009, to depend on its opportunities for gratification. “If one medium offers the same gratification opportunities as another, the two media may overlap or compete (Okazaki & Hirose, 2009, p.80). Dimmick et al. found in a study among consumers that the Internet “had the greatest niche on the gratification opportunities dimension ‘providing news’ and that the Internet and broadcast television satisfied similar needs on this aspect and would then compete for this audience. Similar findings were found when comparing the Internet with newspapers, but at a lower level, whereas with radio there was little overlap (Okazaki & Hirose, 2009, p.81). News itself is cognitively driven content which is updated frequently and is time based.

Rise of New Media

Nelson-Field & Riebe (2011 p.51) pointed out that it is technology that is the driving force behind the plethora of new media, “where literally hundreds (and in some cases thousands, i.e. Internet) of media vehicles within each media class vie for the attention of the media consumer.” They also gave as examples of media fragmentation, “streamed broadcasting (radio and television), podcasts, (i.e. MP3 downloads), user generated media (i.e. Wikipedia, YouTube, Facebook, web blogs), short message service (SMS) and video games.” Citing Papper et al. (2005) and Hess (2009) they noted that despite the increase in media opportunities the total time spent on media has remained at “just over eight hours in 1999, 2005 and 2009.” (Nelson-Field & Riebe 2011, p.52). One of the phenomena resulting from these changes is an increase in the “degree of concurrent media usage” (Papper et al., 2005;

Block, Shultz, and BIGResearch 2009), cited by Nelson-Field & Riebe 2011, p.52.

Crosier, Grant and Gilmore (2003, p.4) however, reckoned that “Historical evidence shows that new media do not usually replace old media.” Citing Franz (2000) it was the way that media were used that changed, resulting in a decline in the attention given by consumers and a greater degree of selectivity. This was leading to more emphasis on the “strategic planning of the media mix.” Elaborating on Napoli’s (2011) term “audience autonomy” Sullivan (2013, p. 217) pointed out that as audiences became less dependent on over-the-air television and radio, it “further complicated the already arduous process of locating these individuals in time and space for the purpose of advertising to them.”

Business Model Response to Competition

Four business models for media companies that took into account the competitive conflict between traditional and new media were put forward by Berman, Abraham, Battino, Sipnuck & Neus (2007, p.24). (see Figure 2 below). The first of these models titled “Traditional media” relies on branded content created by professionals that is delivered by professionals through a “walled” conditional-access environment and dedicated devices.”

The second model called “Walled communities” is based on distribution of user- and community- generated content within a “walled” or conditional access environment through dedicated devices.”

The third model “Content hyper-syndication” makes professionally produced content available in open channels, without dedicated access providers or devices.”

The fourth model “New platform aggregation” relies on both user-generated content and open distribution platforms.”

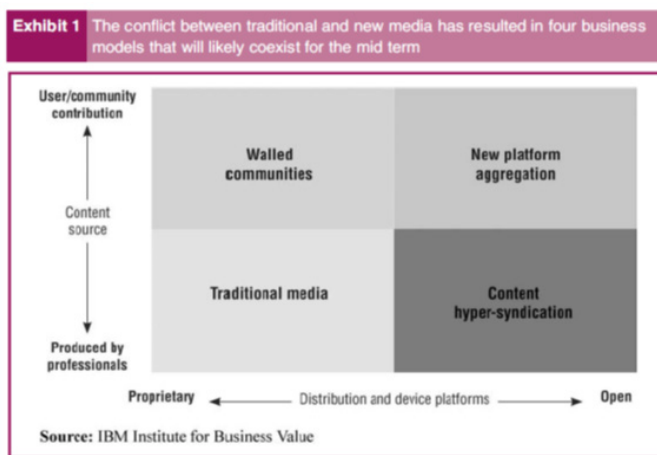


Figure 2: Business Models

Source: Berman et al. (2007), p.24.

The models share two dimensions when dealing with competition: content is produced across platforms and is therefore multiple media orientated by definition; and content is either provided by the media owner or the audience themselves. Measurement across such scenarios must therefore follow a multiple media focus.

Efficiency versus effectiveness

Media Fragmentation

With reference to the Netherlands, Olsthoorn, 2003 (cited by Bronner, van Velthoven & Kuijpers, 2005), discerned that whilst people were provided with a fourfold increase in advertisements over the last ten years, the time on consuming media was more or less the same as it was 25 years ago.

One difficulty was that “Consumers expose themselves to multiple media forms and messages simultaneously.” What was needed under these circumstances was multi-media information whereby comparisons of media types could be made (Bronner, van Velthoven & Kuijpers, 2005, p.145).

Webster & Ksiazek (2012, p.40) in the quest for the aspects that determine fragmentation conceptualised “media as providing resources (media providers) that agents (media users) appropriate to accomplish their purpose.” For this to be successful “both parties rely on information regimes (media measures) to monitor consumption.” Fragmentation comes about because of the growth in “media outlets and products competing for public attention.” Included in this expansion are “social media”. Citing Webster (2010) “These include networks such as Facebook, purveyors of user-generated content such as YouTube, and assortment of content aggregators such as Netlix, iTunes, Google and Digg.” Media users can follow different strategies. Open to question is “Whether people use the growing abundance to consume a steady diet of their preferred genre or to sample a diverse range of materials.” Media measures are required for providers to operate efficiently “they must be able to see what the users are doing”, which then enables them “to verify that they have an audience, adjust their strategies for managing attendance and monetize the results.” (Webster & Ksiazek, 2012, p.41).

“The Long Tail”

Anderson (2006), cited in McDonald (2008, pp.313-314), perceived that consumers were making more use of the wide range of choices made available through “digital technologies” and that this was reducing the audience for television “as alternative distribution channels such as cable and satellite had catered to more fragmented niches” The Internet, to give one example, had opened up the market for “low-occurrence niche items that would have trouble finding their customers in conventional geographically bound markets.” The implication was that the normal distribution was being replaced by one where there was a multiplicity of choice and less focus on the major media. Figure 3 shows a normal distribution and Figure 4 the “Long Tail” which typifies the way in which markets have developed.

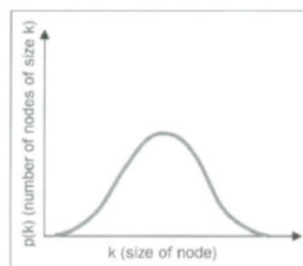


Figure 3. A Normal Distribution
Source: McDonald, 2008, p.314

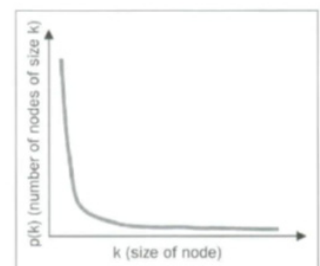


Figure 4. A Power Law Distribution

Fragmentation: Key take out for measurement

McDonald's (2008) work had implications for media research "as it will not be economically viable to apply conventional random sampling methods to the measurement of increasingly minor audiences" (McDonald, 2008, p.316). Napoli (2011, p217), cited in Sullivan (2013), also commented on the decrease in the speed and increase in the cost of audience research on representative samples of audiences distributed across "different media channels and technologies."

Anderson (2006, p.6) described how "The economics of the broadcast era required – big buckets – to catch huge audiences", but this is being eroded by the Internet which provides access to literally millions of niches. What is surprising is that whilst many niche offerings only have a few hits, in combination they can exceed those of the traditional media. He contrasts the relatively small numbers of items and customers that a "traditional" retailer has compared with the growing multiplicity of offerings and enormous potential market provided by the Internet (Anderson, p.17). However, a further aspect is required to bring the two together, which is the ability of consumers to access their requirements through various highly efficient search facilities, such as "Google", "Yahoo", "Microsoft" and others (Anderson, p.215).

Thus there has been much made of the fragmentation and the long tail of niches that new media has engendered (McDonald, 2008; Green, 2011; Webster & Ksiazek, 2012) while not increasing the overall time that consumers spend listening to media in total (Nelson-Field & Riebe 2011). Green (2011) and Berman et. al. (2007) disagree with the consensus on total media time being unaffected. Both sets of authors state that measurement has not developed to cover the new customer experience totality (Berman et. al., 2007) and the increased number of listening occasions, places and mindsets (Green, 2011). Green (2011), an Ipsos MediaCT specialist in Europe, details progress in measurement from diary methods, to the Portable Peoplemeter (PPM) and later online diaries. He compares and contrasts the benefits of each tool and looks towards new media as providing the solution to a measurement dilemma – particularly in the form of smartphones. Ipsos developed MediaCell which runs through software embedded in respondents' smartphones that will detect the inaudible codes embedded in the broadcast system of participating stations (Green, 2011). Green notes that there is industry resistance to newer technology because the larger media players feel that media fragmentation and its more accurate measurement will decrease their current share and the role of peak periods as more media occasions are entered into the pool. McDonald (2008) agrees and asserts that the advertising industry must reconcile itself to the amalgam of data integration, modelling, fusion and similar hybrid systems as the best option is a combination of "random probability sampling for the biggest TV programs and largest magazines, for example, and non-sample-based measures for the niche media events in the long tail" (p. 313).

Media Repertoires

Media repertoires are the most promoted means of dealing with the multiplicity of media choices (Watson-Manheim & Bélanger, 2007). Similarly, Webster & Ksiazek (2012, p.39) put forward "a media-centric approach that tallies total audience across outlets or products", which "is typified by trend lines, long tails, and power law distributions" terming it "a user-centric approach that focuses on the media reper-

toires of individual consumers." Watson-Manheim & Bélanger (2007) found that communities or segments have repertoires which are "the collection of communication channels and identifiable routines of use for specific communication purposes within a defined community" (p.268). The "community" of these authors speaks to Franz's (2000) rich data ("sociodemographic, psychographic and consumer behaviour") where sets of media channels can be used to target certain groups. Watson-Manheim & Bélanger (2007) moreover, found that repertoires are dynamic but new media are integrated into the repertoire through the development of a set of community norms in how to behave within the new channel. Kim (2008) underscores the approach and asserts that media planning cannot take place without the development of models which include consumer attitudes and activities.

Media repertoires knit together a community of like-minded rather than like demographic people. As Hollander (2008) found, increased media clustering of people who hold similar attitudes have created a "balkanization of interpersonal communication networks, with people ... much like themselves, thus reducing their opportunities to hear the kind of divergent viewpoints...[and lead to] greater polarization" (p.23). Hollander relates this to Festinger's theory of cognitive dissonance, where individuals seek selective exposure to a fragmented media world to create the equivalent of Berman et. al.'s (2007) gated communities without the media owner having to actively 'wall' off the community; people do it themselves. Those particularly affected were political "partisans" who actively select news sites favourable to their world view. Hollander's (2008) research demonstrated that such groups negatively impacted the overall consumption of print media because they favoured more niche online sources and polarised debate and in doing so partisans increased the desire for entertainment over news content by non-partisans.

This fragmented media world has other implications too. Taneja & Mamoria (2012) saw key challenges arising for traditional measurement stemming from the following: firstly, large media **fragmentation**; secondly **multiple forms in which the same content can be viewed** (for example on-line and mobile devices to television for the same show) and third **the greater freedom that content consumption habits have from schedules**. If consumers can view content on many platforms at many different times and places this provides them with great autonomy to structure their own usage patterns.

Consequently, it is not surprising that Nichols' (2013) Harvard Business Review article advocates the movement away from 'swim lane' measurement where all media are viewed separately (see Figure 5 and Figure 11). Nevertheless, this is not easy as cross media measurement needs to serve multimedia campaigns, which by definition, must demand comparable metrics across media (Taneja & Mamoria 2012). Traditional audience information systems do not do this as individual media categories have conducted their own research (White 2007 in Taneja & Mamoria 2012) and this has resulted in currencies which are medium specific (Levine, Morgan, Hepenstall, North & Smith, 2001 in Taneja & Mamoria 2012). For example, readership and frequency of print cannot be directly compared with television audience rating points (Taneja & Mamoria 2012). When new media metrics, such as click through rates

and cost per action, are included these are less comparable again (Taneja & Mamoria 2012).

Taneja & Mamoria (2012) note the expansion of media repertoires and the evolution of niches which they understandably reflect would prefer engagement rather than exposure based on metrics as their bases are very small. The small audiences of the long tail (McDonald, 2008) do not reflect well in an exposure based metric; but in an engagement based one, these media do outperform more traditional media.

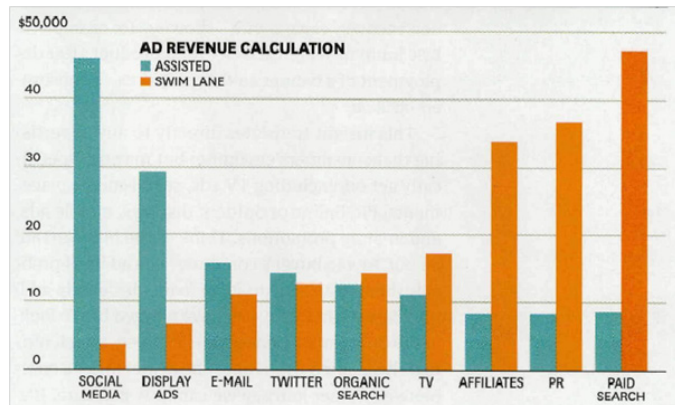


Figure 5: Traditional ‘swim lane’ or non-repertoire measurement
 Source: Nichols, 2013, p. 65

Lack of comparability is the first challenge that measurement convergence faces. The second is the contrast between traditional media currencies which rely heavily on exposure, a fundamental but limited view of audience behaviour (Taneja & Mamoria 2012). Galpin & Gullen (2000) indicated that whilst many media research surveys, including people meters and readership studies, provided the basic information for the buying and selling of advertising they rarely went beyond audience size and characteristics. Research done by “TMP” on print, also cited in Galpin & Gullen, (2000, p.489), showed that “whilst Average Issue Readership provides a reasonable trading currency for agencies and media owners, it has been found lacking as a basis for planning advertisements” in that aspects such as “reading intensity; number of reading occasions, length of reading time and reader location/situation” need also to be taken into account.

The need to go beyond exposure has been apparent for a long time. Galpin & Gullen (2000) reviewed various research studies from the 1950’s that had gone beyond Opportunities to See (OTS) with a view to establishing which conditions led to lower or higher advertising attention, registration and effectiveness. “In 1956 the Advertising Research Foundation (ARF) published A Study of Printed Advertising Rating Methods, which showed that pass-along and out-of-home reading had 85%-90% of the value of primary or in-home reading.” “In 1965, Ogilvy, Benson and Mather showed that there was a difference in recall levels between advertising in different dayparts on television in their Experimental Study of the Relative Effectiveness of Three Television Dayparts.” “Ray & Web (1979), using laboratory tests, found that first position in a string of commercials was associated with higher attention and recall, and as the amount of clutter increased there was a consistent decrease in effectiveness scores.” (Galpin & Gullen, 2000, p 474). By the end of the 1980’s it had been shown that attention and clutter were aspects that related to the advertising effectiveness of all media. Studies in the 1990s have revisited earlier work, but in the context of the growth of media opportunities and growing consumer require-

ments. Even outdoor reported better measurement with a more nuanced approach than just exposure as researchers identified the following as influences on the effectiveness of outdoor advertising “location, position, number of words, colour of outdoor advertisements, respondent involvement and attitude” (Donthu, Cheerian and Bhargava 1993 in Galpin & Gullen 2000, p.490).

Using recall as an effectiveness measure rather than recognition, which would have given a more valid indication of reach, experimental work, under the title The Carat Foretel Advertising Recall Study, 1993, was carried out on television viewing. Aspects investigated were: position and length of commercial break, time of day, reasons for watching a programme and attention level.

A positive relationship between programme engagement and the recall of television commercials based on “the Nielsen Media panel, and purchase records from retailer shopper cards” lent support to Poltrack & Bowen’s (2011, p.345) contention that the effectiveness of advertising was positively related to the content of programmes (see Figure 6). In conjunction with audience size and time spent, audience affinity with content, known as engagement, has had longstanding value for media although little use (Taneja & Mamoria 2012).

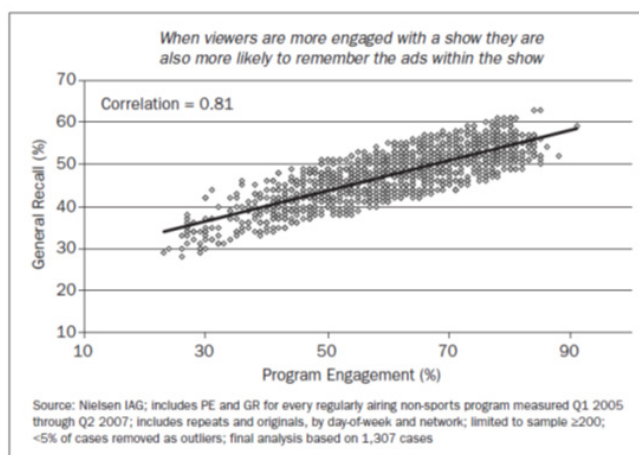


Figure 6: Higher Programme Engagement Yields Stronger Ad Recall.
 Source: Poltrack & Bowen, 2011, p.346.

Interestingly enough, the traditional focus on exposure over engagement suited the ‘head’ or mass media over the tail or niche media (Taneja & Mamoria 2012). With the increasing preponderance of tail rather than head, engagement metrics are more popular with niche players who are unable to establish audience size but are able to obtain engagement particularly since many of their interactions are digitised (Taneja & Mamoria 2012).

Media Synergy

Schultz (2006, p.14) remarked that there was limited inclination to change from the traditional belief that media should be treated as separate entities and that this had led to separate, independent audience measurements and marketing activities (see Figure 7). This view of marketing activity does not allow for consumer interaction between media. Schultz’s (2006) work goes beyond cross-media measurement and into concurrent media usage, where a consumer is not reached by each medium at separate points (such as in Figure 7) but also by more than one medium simultaneously (Taneja & Mamoria had similar findings).



Figure 7: Separate and independent view of media communication, planning, distribution and measurement.

Source: Shultz, 2006, p.16.

Schultz (2006, p.17) depicted two ways in which it is thought that information is processed. “Sequentially or (monochronicity) or in parallel and simultaneously (polychronicity).” Schultz holds the opinion that the weight of evidence is moving in the direction of consumers using more than one medium at the same time. Results of Simultaneous Media Studies (SIMM) conducted in 2002 by BIGresearch found that “When asked ‘when you are watching television are you simultaneously online? 58.4% of male SIMM respondents and 60.3% of females reported that they did.’” (Schultz, 2006 p.20). This then leads to the conclusion that an integrated multimedia approach would be more appropriate than the current model (see Figure 8). Figure 8 illustrates a proposed synergistic model in a “multimedia market place”.

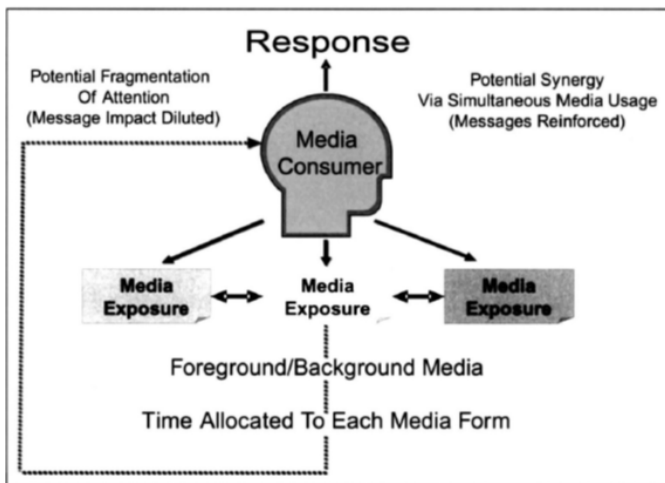


Figure 8: The media proposed consumption model.

Source: Shultz, 2006, p.23

Three theories of media synergy arising from a multi-media advertising campaign have been outlined by Neijens and Piesmaker (2012, p.169).

“The encoding variability theory of Tavassoli (1998) whereby “when a message is received through a variety of media, the information from the message will be encoded in memory in a more complex fashion than if the message was only received through one medium.”

“Forward encoding takes place when an ad in the first medium ‘primes’ the consumer’s interest for and attention to an ad in the second medium” (Voorveld, 2010, p.15).

“The credibility principle (Chang & Thorson, 2004)

suggests that a message is perceived as more believable when it is received through multiple independent sources.” “Multiple Source Perception” entails an increase in credibility if an advertising communication comes from different independent sources (Voorveld, 2010, p.119).

“The transfer principle (Edell and Keller 1989; Sheehand and Doherty 2001; Jim, 2004) proposes that the perception of an advertisement in one medium may be enriched by a previous or subsequent encounter with the advertisement in another medium.” “Image transfer is present when consumers imagine or mentally replay the previously viewed ad during exposure to the second ad.” (Voorveld, 2010, p.117).

A definition of media synergy has been provided by Schulz, Block and Raman (2012):

“Media synergy arises when the combined effect of impact of a number of media activities is deferent from the sum of their individual effect on individual consumer. Thus, synergy is a phenomenon in which the whole is not always exactly equal to the sum of the parts, but could be greater, or lesser than the sum. (p.174)

Schulz, Block and Raman (2012, pp.175-176) put forward the idea that it is consumers through their selection of media that are just as relevant as marketers in determining synergy. Based on online information derived from 22,624 people from June 2009 BIGresearch SIMM, they analysed the daily usage of various media types over a period of one week. From this was derived the minutes spent each day with 10 different forms of media. In addition respondents also supplied information on the influence that 31 media forms had on their purchase decisions.

Through the use of factor analysis three groups of media were found. These were named Digital, Mass and Social, which aggregates Facebook, YouTube and Twitter, though these were not specified (see Table 1 below.)

	Digital	Mass	Social
Internet	0.82		
Email	0.76		
TV	0.73		
Video games	0.46		
Newspapers		0.82	
Magazines		0.77	
Direct mail		0.72	
Radio		0.46	
Blogs			0.83
IM			0.65

Note: Only factor loadings ≥ 0.40 are shown.

Table 1: Rotated factor matrix of media consumption (Varimax – Explains 58.8%)

A second factor analysis was done on the influence on buying decisions by the 31 media types. These were reduced to 16 types which fell into three groups namely Promotions, Brand and Social (see Table B below).

	Promotion	Brand	Social
Coupons	0.73		
Direct mail	0.67		
Newspaper insert	0.65		
Newspaper	0.59		
Email	0.57		
Magazines	0.46		
Internet advertizing	0.39		
Cable TV		0.80	
TV		0.79	
Radio		0.59	
Outdoor		0.54	
Product placement		0.47	
Text messages			0.82
IM			0.80
Video games			0.78
Blogs			0.67

Note: Only factor loadings ≥ 0.40 are shown.

Table 2 Rotated factor matrix of media influence (Varimax – Explains 50.8%).

The conclusion was that usage of different media forms is inter-related and the influence that media has on consumer buying intentions are also inter-related by media type.

Multimedia Research

In a far sighted paper Franz (2000, pp.460 - 465) outlined a future scenario where all “classical media” will be available on the Internet 24 hours a day. “Media research has to face in the future: an unimaginable number of media for a more or less constant number of media users with limited time, money and (most important) attention capacities.” Under these circumstances the inevitable outcome is the use of multimedia and the need for information in order to allocate budget to various categories. Franz was seemingly not aware of any multimedia surveys, but that there were many studies covering only one medium. What was needed was both multimedia data “to make efficient budget allocations” and “Sociodemographic, psychographic and consumer behaviour data, which are available for both the strategic budget allocation and for tactical media selections within media categories.” The multimedia study would cover all main media, whilst a separate target group study would include “Sociodemographics; General Style of consumer behaviour; General attitudes, interests and values; Lifestyle characteristics; Consumer behaviour in heavy adspending categories – FMCG, services, durables; Usage of bigger brands in those categories. The later survey would be the central study to which the Multimedia and Single Media Studies would combine using data fusion (Figure 9).



Figure 9: Spreading target group data to media surveys via data fusion.

Source: Franz (2000), p.465.

The five media market study undertaken by Taneja & Mamoria (2012) reviewed how different countries are dealing with such issues. Taneja & Mamoria (2012, p.122) observed that in today’s environment content can be accessed on many platforms and that “audiences have greater control in scheduling their media use.” This has led to the development of “single source” information systems whereby each respondent’s usage of a range of media is available, sometimes with the addition of attitudes and buying behaviour. A requirement of multimedia information is to have comparable measures of media types. Exposure is commonly evaluated, but the measures used are frequently incompatible with each other. For example, print and electronic media use quite different forms of measurement. Furthermore, since demographics are not a proxy for buying behaviour, this is also a requirement.

Both Nichols (2013) and Schulz, Block and Raman (2012) as well as the earlier work of Schulz (2006) predicate that measurement takes place both at the level of efficiency (traditional reach x frequency) as well as effectiveness (engagement and interaction – to be explored in greater detail below). As such a baseline metric per medium is still required. Company analysis thereof must be more proactive and integrative. Metrics should, where possible, include multiple and simultaneous consumption of different media and real time measurement, as enabled by smart devices. When academics reviewed several different markets a combination of measurement methods was found.

Audience Measurement Across Five Different Markets

Taneja & Mamoria (2012) use Napoli’s (2000) term for audience measurement as “audience information systems” (p.121). Their 2012 paper reviewed audience measurement across five different markets – places as diverse as the UK, India, Australia, Italy and the USA. All these nations seek to establish market ‘currencies’ for media use (Taneja & Mamoria, 2012). In the United Kingdom, for example, audience research has several parallels to South Africa. Advertisers, agencies and media owners manage the research with “Joint Industry Committees” thereby “providing a ‘currency’ for buying and selling advertising” (Windle, 2009, p.271).

Alternatives to ‘swim lanes’ abound with new media technologies where “all manner of consumption on digital platforms leaves traces, which can potentially provide census like information on audience behavior [sic]” (Taneja & Mamoria, 2012, p.124). Taneja & Mamoria (2012) are alluding to what has come at times to be referred to as ‘big data’ (Nichols, 2013). Single source audience information systems have been popular since the first one appeared in the UK in 1966 (Taneja & Mamoria, 2012). In the last ten years, however, there has been vast interest in creating multimedia audience information systems (Taneja & Mamoria, 2012). These authors found three main approaches in research design:

- Single source: multiple media usage is obtained from the same respondents through surveys, peplemeters, set-top boxes or a combination thereof
- Data fusion: the merging of two or more existing surveys by matching respondents between samples; fused data is treated as if it was one survey thereafter
- A combination of the above approaches

In terms of the measurement instrument, there was a

variation between recall surveys, passive measurement and a combination of the two (Taneja & Mamoria, 2012). Australia and India relied completely on recall surveys; the UK had a combination of a recall survey and data fusion, Italy demonstrated a combined recall and passive approach while the US relied entirely on passive data collection (Taneja & Mamoria, 2012). Table 3 provides a summarised comparison of these countries.

India and Australia

These two countries have several parallels with South Africa: India oversample higher income groups; both rely on an establishment survey which is administered door to door and have a self completion leave behind on products and deeper media use (Taneja & Mamoria, 2012). Both countries, however, attempt to expand multi-media measurement beyond exposure. The Australian survey asks in the leave-behind diary about which media respondents find most useful; preferences of each medium across dayparts; their involvement as well as their attention spans when using a particular medium (Taneja & Mamoria, 2012). Engagement metrics go further within the survey to estimate degree of trust, like, credibility and bias of the source. The inclusion of such variables enables some correlation of exposure with content affinity (engagement). Different media owners can compare themselves with others on more than just engagement metrics (Taneja & Mamoria, 2012).

United Kingdom

Australian and Indian practice is similar to British practice as all three go further than adding attitudinal and behavioural questions; they seek to establish the link between the respondents' social practices and their media use (Taneja & Mamoria, 2012). One approach for this is to use a time-use diary for locations and activities throughout the day (India and Australia); another option is to record this electronically and in real time which provides more granular data (the US and the UK) (Taneja & Mamoria, 2012). The UK has an e-diary in Touchpoints which prompts respondents every 30 minutes to enter their location, their social group, their activity and what media they are using. It goes further to ask if the media consumption at that moment is either passive or active and to report their current mood state. Such practice is in line with the research that finds context of consumption, especially the physical area and social practices which surround consumption (Millington & Wilson, 2010).

RAJAR (Radio Joint Audience Research) uses diaries for measuring an increasing number of radio stations and covers "digital audio broadcasting (DAB)". The number of adults listening via a mobile phone increased from 1% in 2002 to 12% in 2008 (Windle, 2009, p.271) and to 19% third quarter 2012 (RAJAR, 2012). In addition to diaries portable meters are used, though there is some anxiety about whether "respondents forget to carry their meters, especially first thing in the morning." (Windle, 2009, p.272).

The NRS using in-home 'double screen' CAPI interviews measure an increasing number of newspaper "sections and supplements, but there has also been a steady decline in circulation" Magazines have also shown an increase as has accessing newspapers and magazines via the Internet (Windle, 2009, p.272). Windle (2009, p.272) also draws attention to the possibility of using the Internet to measure readership. However, this raises concerns about representativeness of the sample and whether those who reply are atypical.

"BARB (Broadcasters' Audience Research Board) is responsible for providing estimates of the number of people watching television. This includes which channels and programmes are being watched, when they are watched and the type of people who are viewing at any one time. Viewing data is collected second-by-second and delivered on a minute-by-minute basis for channels received within the UK. The channel viewed the longest in a clock minute is attributed the viewing of that minute. Viewing at anything other than normal speed (fast forwarding/rewinding live or recorded content) is not reported. The data is available for reporting nationally and at ITV and BBC regional level.

Viewing estimates are obtained from a panel of television owning private homes representing the viewing behaviour of the 26 million TV households within the UK. The panel is selected to be representative of each ITV and BBC region, with pre-determined sample sizes. Each home represents, on average, about 5,000 of the UK population."

In addition a continuous Establishment Survey using a sample of 53,000 at home interviews collects "the characteristics of UK households (demographics, viewing equipment, etc), producing universes for panel control and weighting purposes and providing addresses from which to recruit the panel." (BARB, 2012).

The inclusion of brands in all country surveys is invaluable as it provides the link between brands and media which is vital for media planning (Taneja & Mamoria, 2012). It is when such branded behaviour becomes digitised and passive that the granularity of the data as well as its reliability increases (Taneja & Mamoria, 2012).

Market uses of these measurement systems

Data is collected for multiple media from a single respondent (Taneja & Mamoria, 2012). This makes it very valuable when planning multimedia campaigns. The two more passive systems – Italy and the US through Touchpoints and EMM – are used extensively to optimise budgets cross media (Taneja & Mamoria, 2012).

These surveys are also key for consumer profiling, particularly the survey based single source studies (Australia's Roy Morgan and India's TGI) and these profiles are key to finding the core media and content genres that appeal to different groups of people (Taneja & Mamoria, 2012). Media owners use single source data to showcase their audiences particularly because such data have much larger samples than single medium surveys. Larger sample sizes mean a wider spread of titles and content offerings can be measured and smaller outlets can get a chance (Taneja & Mamoria, 2012). Smaller media generally prefer arguments based on engagement rather than exposure (Taneja & Mamoria, 2012) and the inclusion of more engagement orientated metrics (see above) enables them to report their impressive engagement figures. Single source systems based on panels do not offer the required large sample sizes that would provide value to more niche based media (Taneja & Mamoria, 2012). Systems which fuse panels and census data (NCS and Touchpoints) are still treated with scepticism by the market which is unwilling to accept fused data as a true alternative to respondent level data (Taneja & Mamoria, 2012).

System	Roy Morgan, Australia	TGI India	NCS, USA	EMM, Italy	IPA Touchpoints, UK
Approach: Single source (recall survey or electronic meters) or data fusion	Single source survey	Single source survey	Fusion	Mixed ^d single source	Hub survey and fusion
Measurement method					
Television	Recall	Recall	Existing ^b (meter/STB)	Meter	Existing (meter)
Radio	Recall	Recall	—	Meter	Existing (diary)
Internet	Recall	Recall	Existing (meter)	Recall ^c (daily)	E-diary ^d
Mobile	Recall	Recall	—	—	E-diary
Purchase	Recall	Recall	Frequent shopper data	Recall (weekly)	Existing (TGI UK)
Location/other activity	Diary (once)	Diary (once)	—	Recall (daily)	E-diary
Effective sample size	20,000	31,000	375,000 ^e	7,000	50,000
Frequency of data update	Annual	Annual	Continuous	Continuous	Annual
Main subscribers	Agencies ^f	Agencies, niche broadcasters	Select media owners & agencies ^g	Agencies, some broadcasters	Agencies
Purpose of use	Consumer profiling	Consumer profiling, sales arguments	Targeting using purchase behavior	Strategic media planning	Strategic media planning

Note. TGI = Target Group Index; NCS = Nielsen Catalina Solutions; EMM = Eurisko Media Monitor; IPA = Institute of Practitioners in Advertising
^aEMM uses a combination of recall surveys and electronic meters. ^b“Existing” implies that the system uses the existing measurement currency for the medium. ^cShort surveys are sent out on the portable peplemeters that respondents carry with them. ^dThese are Electronic Diary entries made by respondents on handheld devices. ^eFor Fusion based systems the effective sample size is the total usable respondent number after the Fusion, which differs from the total of the number of respondents in each individual surveys. ^f“Agencies” include usage by advertisers as these do the actual data analysis on behalf of their clients. ^gNCS is a relatively new system whose use has been reported only by a few media owners and few agencies so far.

Table 3: Summary of audience information systems reviewed
Source: Taneja & Mamoria (2012), p. 130

Incorporating digital footprints and ‘big data’

As the market place becomes more digitised, more opportunities are created for audience information systems to capture more granular, more real time behavioural activities to create census-like data (Taneja & Mamoria (2012). Data digitisation is often being called ‘big data’ (Nichols, 2013). Such ‘big data’ has three characteristics: data variety, data velocity and data volume (Hurt, 2012, see Figure 10).

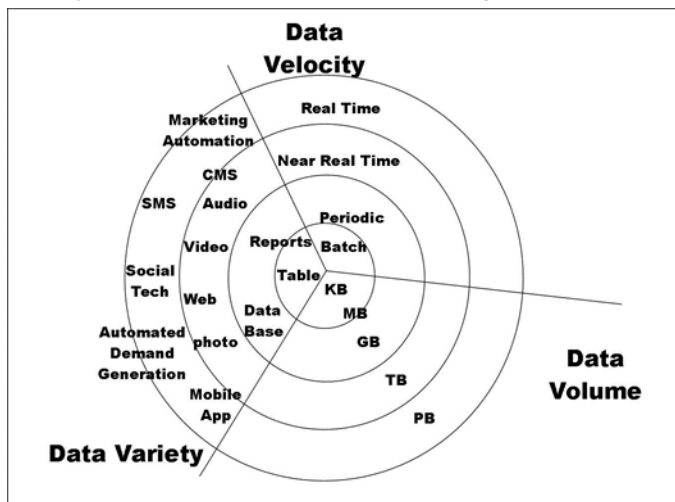


Figure 10: The three Vs of big data
Source: Hurt (2012)

Taneja & Mamoria’s (2012) five market study found no single source, cross platform system (apart from the American NCS) to leverage the opportunity that digitisation presents. There were some individual firms, however, who have begun to provide measures. The Americans had 10 firms who were making use of return path data from television set boxes such as Telecommunications Research Associates (TRA) (Taneja & Mamoria 2012). Return path data are able to report census-like estimates and overcome small sample size problems that threaten the accuracy of panel based approximations for fragmented media (Taneja & Mamoria 2012). The TRA, for example, runs single source panel combined with

frequent shopper cards and a sample size of 370 000 (Taneja & Mamoria 2012). Such practice enables actual behavioural consumption to be matched with media usage, demographics and psychographics.

Nichols (2013) provides another example of how information systems can be created as any interaction which occurs in digital space will leave a trace (Taneja & Mamoria 2012). In Nichols’ (2013) article, he reports that ‘big data’ – the increased digitisation of all information can form an integrated measurement system. Here traditional media metrics, new media metrics, ‘big data’ (internal company real time data capture) and cloud computing analytics is now possible through advanced statistical modelling. A clear part of the process is market conditions, marketing actions and competitor actions (Nichols, 2013). None of these can be tracked through internal company metrics or through online available data alone; a shared source is required. Once obtained, he describes the process in terms of

“three broad activities: attribution, the process of quantifying the contribution of each element of advertising; optimization, or “war gaming” by using predictive analytics tools to run scenarios for business planning; and allocation, the real-time redistribution of resources across marketing activities according to optimization scenarios” (p. 63) See Figure 11.

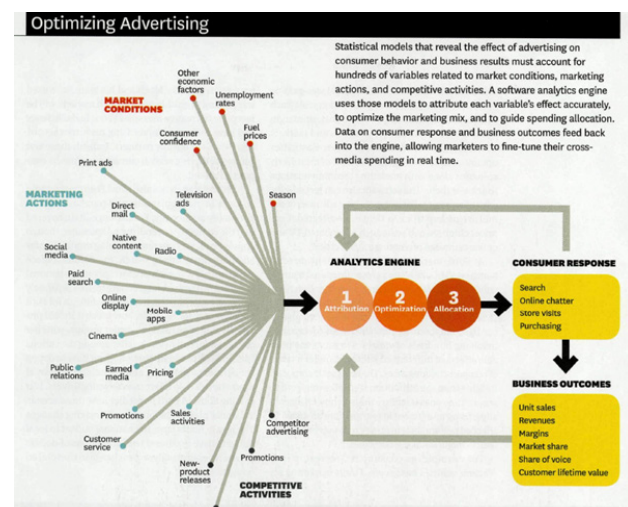


Figure 11: “Advertising Analytics 2.0” Integrated and Repertoire Metrics – use of ‘big data’
Source: Nichols, 2013, p. 68

Nichol's process is tailored for an individual company and is levelled with an extremely high degree of integration. It is not possible without input from an "audience information system" (Taneja & Mamoria, 2012).

Less proprietary approaches were also found in the US but also utilised digitisation extensively. Optimedia's Content Power Ratings use three dimensions – delivery, involvement, advocacy – to calculate a programme's score (Taneja & Mamoria's 2012). Delivery is a sum of impressions across platforms; involvement is based on awareness, loyalty (both from primary research) and online search volume and advocacy is based on a mix of other information from online buzz and recommendations (Taneja & Mamoria 2012). These dimensions begin to bridge the disparate categories of traditional media measurement.

Taneja & Mamoria's (2012) review of the markets stressed the need for any innovations and new metrics to be done on the basis of existent industry currency. They reported the greatest threats to new systems were their entire reliance on recall surveys (India and Australia) and their infrequency of collection (at best these were collected every six months) in markets where participants are accustomed to overnight or weekly reporting. Another threat they found lay in small sample sizes; the leverage of passive recording devices is only possible through large sample sizes and the ability these then provide to measure a more fragmented market place and thereby represent the long tail.

In addition, Taneja & Mamoria (2012) stress that new systems should avoid conflicts with existing currencies – in India TGI adjust the data to match the Indian Readership Survey. Touchpoints (UK) is cited as the tool which avoids currency conflict by integrating all existing currencies (Taneja & Mamoria 2012). In the second version of Touchpoints, behavioural data is integrated as well (Taneja & Mamoria 2012).

Network analytics

Another approach which focuses on the measurement of media synergy is that of network analytics, as used by Nielson's TV/Internet Convergence Panel (Ksiazek, 2011). The panel itself is of cross-platform data which is collected through electronic meters (Ksiazek, 2011). Use of meters increases the accuracy of the data while the panel provides a 'single source' and respondent level data across TV and internet by monitoring individual activity across all platforms.

"The Convergence Panel is primarily an offspring of Nielsen's National People Meter Panel, which provides the "currency" on which TV ratings are based and advertising space is bought

and sold. Upon completion of their tenure as members of that panel, Nielsen offered participants the opportunity to join the Convergence Panel by adding behavioral tracking software to their computer while keeping their People Meters. In addition, Nielsen recruited retiring members of the National Hispanic Television Index and approximately 20% newly installed homes. Acceptance rates range from 50.9% for new homes, to 55.2% for the existing national panel members, to 63.6% for the Hispanic homes" (Ksiazek, 2011, 243).

Data is collected in near real time and is enabled through the extensive use of software.

"Nielsen tracks the panelists' media use through two devices. A People Meter is installed in each participant's

home on all television sets. The device records usage data 24 hr per day, and transmits the information to Nielsen headquarters on a nightly basis. The television viewing data ("Live C 7 Days") consist of both live and time-shifted viewing within the subsequent 7 days, where one or more minutes constitute exposure. As for Internet measurement, Nielsen installs the NetSight Meter, behavioral tracking software developed by Nielsen Online, on as many of the panelists' personal computers as they would agree to have measured, with the primary computer being required. When tracking Web browsing, the software only records the actions for the window/tab in use. For example, it would not record usage for a minimized Web page. The threshold for counting use of a particular Web site is 1 sec or more. Nielsen has created an enhanced version of their analytical software, NPower, to handle the cross-platform data." (Ksiazek, 2011, 243 - 244).

Measurement is centred on ascertaining the degree of overlap between media. Figure 12 illustrates a sample media network in terms of its components; media outlets are defined as nodes and the process seeks out the degree of duplication between two nodes (that is, the percentage of the audience who are exposed to one outlet but also shared with another outlet (Ksiazek, 2011). Ksiazek (2011) reports that audience duplication studies go as far back as 1945 when A.C. Hooper, a company who produced radio ratings, began offering this metric to their clients. Duplication has received fresh interest since the late 1990s (Ksiazek, 2011). Measurement within the network has several options:

- Primary Duplication which tracks the percentage of the audience of outlet i is also exposed to outlet j. Duplication can be viewed either as synergistic or supplementary.

"level of *Primary Duplication* between two outlets represents the strength of the tie from one outlet to another. For instance, we might say that there is a strong tie between the audience of ABC and the audience of NBC, but a weaker tie between ABC's audience and that of Facebook's (i.e., 90.62% of ABC's audience also watched NBC, but only 31.31% used Facebook during March 2009" (Ksiazek, 2011, 240).

- "*Absolute Duplication* is a more general treatment of audience duplication, defined as the percentage of the total audience that is exposed to both outlets in a given pair. It asks, What percentage of the total audience is exposed to both outlet i and outlet j? Whereas Primary Duplication accounts for directionality (i.e., from 1 outlet to another), Absolute Duplication does not. Instead, it measures the total overlap between the audiences of two outlets" (Ksiazek, 2011, 240).

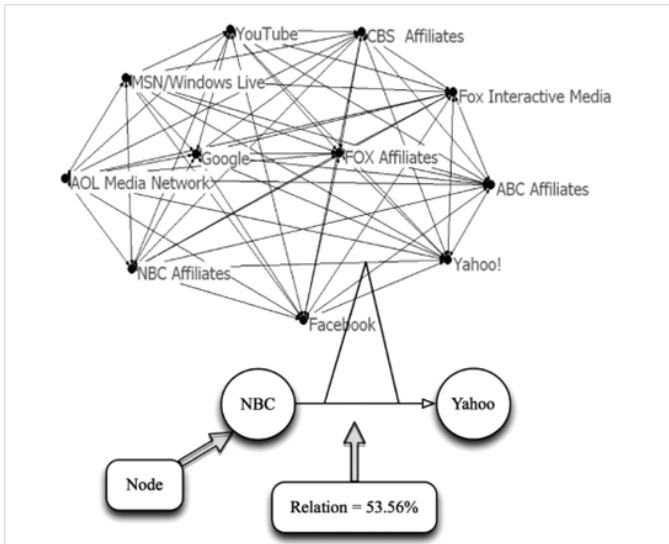


Figure 12: Media network across TV channels and Internet brands (Nielsen TV/Internet Convergence Panel)
 Source: (Ksiazek, 2011, p. 238).

Ksiazek (2011) goes on to present a third option which is novel to his work

- “Deviation-from-Random Duplication indicates the degree to which the observed duplication between two outlets differs from the expected duplication between those outlets.” (Ksiazek, 2011, 240). Ksiazek (2011, p. 242) claims this is a better measure because
- “Deviation-from-Random Duplication provides a more conservative measure than raw duplication measures by controlling for the influence of high reach percentage values. Research consistently finds that gross measures of exposure (e.g., ratings for TV programs) explain most of the variance in audience duplication, so much so that some have called this pattern the “duplication of viewing law” (Barwise & Ehrenberg, 1988; Goodhardt & Ehrenberg, 1969; Goodhardt, Ehrenberg, & Collins, 1987; Headen et al., 1979).” (p.242).

A Time of Pulling Together: The Move towards Convergence

Convergence: Media Product, Audience, Channels and Business Models

What is convergence?

The ‘single source’ demands of Nichols (2013), Schultz et al (2012) and Schultz (2006) are met through convergence. McPhillips & Merlo (2008, p.237) defined media convergence as “the ability to deliver different media channels via one digital platform.” It thus speaks to the business model options defined by Berman (2007). “Digital convergence refers to the integration of different networks caused by increasing interconnection and interoperability between services and markets, firms and industries, and regulatory institutions.” (Lee & Kim 2012, p.139).

Jenkins (2006, p254) considered that “convergence represents a paradigm shift – a move from medium-specific content toward content that flows across multiple channels, toward the increased interdependence of communication systems, toward multiple ways of accessing media content, and toward ever more complex relations between top-down corporate

media and bottom-up participatory culture.

While some see content to consequently flow through the most cost effective route: “Convergence is a significant and substantial change in what is possible with implications beyond the telecommunications and broadcasting industries. Technological convergence shows the possibility of any “content” (information, entertainment, educational material, business data etc. in the form of text sound, video or picture) or communications (voice, text or video) to be distributed via whatever is the cheapest, or most efficient route.” (Lanerolle, 2011, p.48).

Other researchers lean towards a more strategic view, stating that “Convergence is both a top-down corporate-driven process and a bottom-up consumer-driven process. Media companies are learning how to accelerate the flow of media content across delivery channels to expand revenue opportunities, broaden markets and reinforce consumer commitments. Consumers are learning how to use these different media technologies to bring the flow of media more fully under their control and to interact with other users.” (Jenkins, 2004, p.37). The role of interaction speaks both to content creation (Berman 2007) as well as Verhoef et al.’s (2010) engagement and, therefore, what is optimal for the need state and the occasion of consumption by the consumer rather than a purely economic motive.

“Convergence refers to a process, but not an end point. Thanks to the proliferation of channels and the portability of new computing and telecommunications technologies, we are entering an era where media will be everywhere and we will use all kinds of media in relation to each other.” (Jenkins, 2004, p.34). The new computing requirements and possibilities are paramount in this world.

One of the outcomes of convergence is the emergence of new media conglomerates that cover a broad range of activities (Jenkins, 2004, p.34). “Whereas Old Hollywood focussed on cinema, the new media conglomerates have controlling interest across the entire entertainment industry. For example “Warner Bros. produces film, television, amusement park rides, books, newspapers, magazines and comics.” (Jenkins 2006, p. 16).

The Traditional Media Business Model

The traditional media business model (see Figure 8) as envisaged by McPhillips & Merlo (2008, p.238) “has historically been based on: (1) Media owners acting as a conduit providing entertainment content to consumers, (2) Consumers paying for this content, (3) Companies being given access to the media owners’ audience in order to deliver messages to them, and (4) Governments and regulators determining the parameter of the industry.”

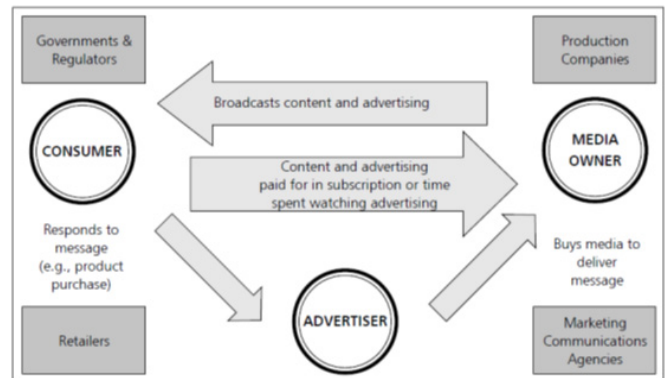


Figure 13: The current business model of the media industry
 Source: McPhillips & Merlo, 2008, p.238.

This model is being adversely affected by “over-supply” and the falling effectiveness of advertising. McPhillips & Merlo (2008, p.251) believe that the basics of this model will remain the same as “It will still centre on a mutually advantageous relationship between media-owners, consumers and advertisers.” What is changing is the “dynamics contained within the model.” With the increasing fragmentation of media advertisers are able to pin-point their advertising, which reduces waste and does not overload consumers. Nichols (2013) clearly points the way as to how this is being done as there is real time monitoring capacity through ‘big data’ and ‘advertising analytics 2.0’ as well as the ability to ascertain effectiveness through engagement.

Marketing Integration

Tackling new channels and media has resulted in the primacy of content although the production content itself has become as fragmented as the channels through which it is distributed. Content owners wish to retain their past control over the distribution and ownership thereof and this is evidenced through the desire to retained “walled communities” (Berman, Abraham, Battino, Shipnuck and Neus, 2007, p.24). While Berman et. al. (2007) conceptualise two axes – professional versus user production on the one and open versus closed platforms on the other in their discussion on new business models affecting the industry, they also stress that the media industry must “[d]eliver experiences, not just content” (p.25). These authors highlight the role of user experiences – this comes strongly in line with customer experience management (see Vargo, Lusch & O’Brien, 2007 among many authors) which marketers have measured and sought for years since its conception in 2000. McPhillips and Merlo (2007) even use the term “touchpoints” which is terminology directly sourced from customer experience management. In customer experience management, a touchpoint is a point of interaction with the brand (Vargo & Lusch, 2004; 2006; 2008). An array of metrics have been developed to ascertain customer experiences at each and every point of contact with the brand.

If three marketing paradigms – marketing experiences, marketing media and marketing metrics are coalescing around the new media world, marketers and researchers can utilise the metrics from customer experience management and its understanding of the interaction point between consumer and brand in order to deal with the changing media landscape. It is the work of Vargo & Lusch (2004; 2006; 2008) that developed the concept of consumer “co-creation” – another parallel with the “pro-sumption” that new media create for consumers as creators of content.

To build on this, a strong theme around both marketing experiences and marketing new media is the term “consumer engagement”. Many authors, such as Poltrack and Bowen (2011) stress that advertising effectiveness is positively associated with audience engagement and that engagement is key to overcoming clutter and inattention.

Stronger Synergies

Media synergy is a recognised concept which predates new media. Neijens and Piesmaker (2012) stress the importance of this concept for new media as encoding is enhanced because brand messaging is built up in more complex ways across media channels. Berman et. al. (2007) take this the logical step further: if encoding is enhanced through different messaging across platforms, partnerships between media and their advertisers becomes far more synergistic and integrated as well. In later research, Berman, Battino & Feldman (2011) state that

“As an example of this integrated shopping experience, Foursquare [a mobile application], which provides a location-based social network mobile application, is enabling businesses to offer hyper-local targeted marketing messages to consumers based on proximity and frequency. In addition, users offer peer reviews of locations and services, adding a layer of user-generated content. In exchange for loyalty, more and more businesses – from local retailers to larger organizations like Bravo TV, Starbucks and The History Channel – are offering coupons, discounts, free goods and marketing materials” (Berman, Battino & Feldman 2011, pp.49-50)

Part of this trend is the partly realised longed-for goal of truly integrated marketing communications (IMC) – the ability of marketing messages to be situation specific and encoded with flexibility to adapt to market changes (Eagle, Kitchen and Bulmer, 2006). Authors in the field speak of “integrating all elements of the promotional mix” and “the need for outside-in or customer driven marketing” (Eagle et. al. 2007, p, 957). All such initiatives are what Berman et. al. (2007) and Berman et. al. (2011) state that new media business models must enable. Eagle et. al. (2006) explicitly link IMC to conventional marketing metrics and conducted a survey among advertising agencies where the results thereof saw agencies striving to link communications to company ROI fare more clearly. The overall role of engagement in the business model is summarised by Verhoef et al. (2010) below (see Figure 14 below).

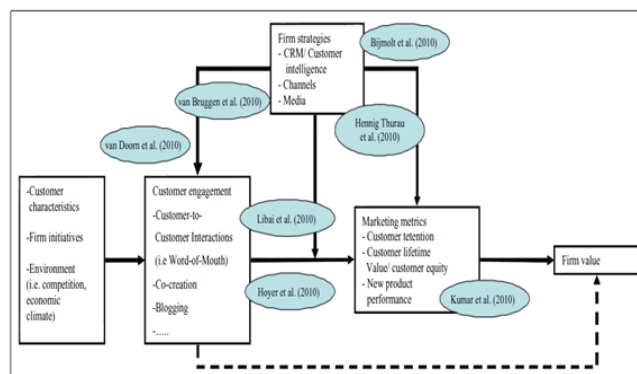


Figure 14: Conceptual Model of Customer Engagement

Source: Verhoef et al. (2010) p. 249

Huang & Chitty (2009) take the synergies of product, brand, media, co-creation and media through their review of how audience participation has become the product in the case of many reality shows. These authors speak of a “growing interconnectedness” and a combination of “immediacy” and “multi-mediacy” which

“instantly link[s] ... media and cultural, economic, political and social domains. Immediacy is the reduction in distance and time between events and media users. Multi-mediacy is the hybridisation of media forms, content and channels, as exemplified in mobile telephones linked to studio events” (Huang & Chitty, 2009, p.124).

New technology has enabled audience participation to become a key value proposition in much content. People consume the content because it is co-created.

“A commodification of audience participation has

added value to the audience as commodity, as advertisers look for audiences that are more engaged. Audiences look for social experience, community and participation – not just for goods” (Huang & Chitty, 2009, p.125)

While audiences now actively create the content and this created content encourages their subscription (see Figure 15 below), media are also employed beyond mere communication and entertainment. As Huang & Chitty (2009) note, “[w]e now shop on TV, watch television on our phones and chat on the Internet” (p.125) which leads to simultaneous “image projection, trade and information transfer/exchange” (p.126). Consequently “[c]ommunication itself as a process has moved from being one that supported other business processes to being the central process and technology of business” (p.126).

“While engaging in communication of business as a business, the revenue of the vast majority of media is based largely on advertising income, and partly on pay services or subscription/license fees. The product-driven model of media economics focuses on the quality of media products in order to “sell products to audiences”, therefore to accumulate viewers/readers for the purpose of audience commodification (selling audiences to advertisers). As quoted by Keleman: “The task of those who program television is to capture the public’s attention and to hold it long enough to advertise a product” (2001: 169). In a convergent and competitive media environment, production and content ideas are judged by audience appeal and potential for cross-marketing. The traditional and conservative media economy pattern, taking television industry as an example, relies mainly on advertising. But advertising on TV follows the pattern of AIDM (Attention, Interest, Desire, Memory) rather than A (Action).¹ The shift from audiences to consumers is not achieved during the process of watching TV, and not even achieved in the immediate aftermath of watching TV. There is a long time-space distance between media watching and the act of purchase, except in the case of TV shopping; media have served historically as communication channels on the margins of the world of business.” (p.126)

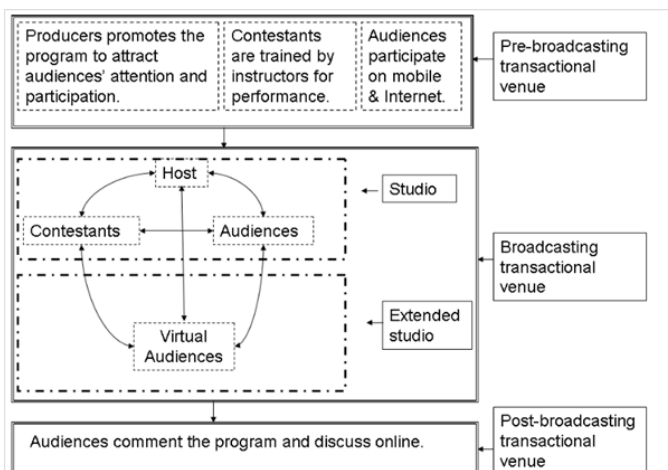


Figure 15: Business model of reality show
Source: Huang & Chitty, p.128

The change that Huang and Chitty (2009) describe represents “an evolutionary leap” (p.127) “by becoming channels of communication and distribution simultaneously (Baker, 2003), which shrinks the distances between consumers’ AIDM and A (action); therefore media successfully extend

their revenue patterns by selling directly to audience” (Huang and Chitty, 2009) (see Figure 17). These authors provide two case studies to demonstrate the integrated business model. These cases place into reality what Berman et. al. (2007) and Berman et. al. (2011) were alluding to when they spoke of the new business models that the media industry faces; although Huang & Chitty go one step further to vocalise the fact that all of the four Ps (price, product, place and promotion) are now demonstrated at one time and place and this occasion of consumption is what media companies can monetise. The authors provide a model by which audience/consumer media consumption in the new environment can be measured (see Figure 16).

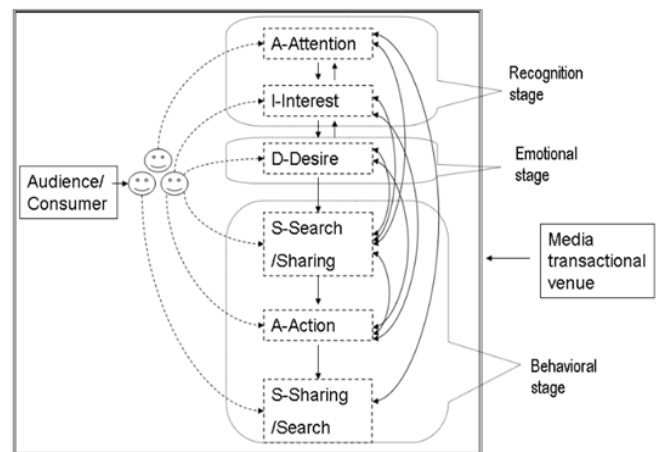


Figure 16: The AIDSAS Model of Audience/Consumer's Media Consumption

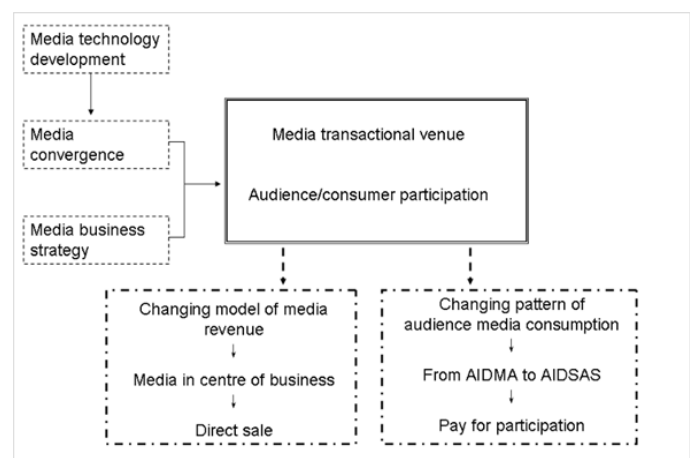


Figure 17: Media Transactional Venue and Audience/Consumer Participation
Huang & Chitty, p.138

Current media measurement towards greater integration

Poltrack & Bowen (2011, p.345) found that advertisers were now going beyond demographics in defining target markets and were frequently taking into consideration “attitudes, motivations, behaviour and other demand characteristics.”

Later work begins to take engagement metrics into new media and its content activities. Consumer experience management accepts and views “[c]ustomer engagement [to] [consist] of multiple behaviors such as WOM, blogging, providing customer ratings, and so on” (Verhoef, Reinartz &

Krafft, 2010, p. 249) because in an

“ increasingly networked society where customers can interact easily with other customers and firms through social networks and other new media, non-transactional customer behavior is likely to become more important in the near future. Moreover, we observe that firms are increasingly pursuing strategies steering non-transactional behavior. For example, leisure firms proactively ask recent customers to provide ratings on independent comparison websites. Recently, Lays’ chips asked customers to develop a new chips flavor in a contest. The winner will receive 1% of the turnover of the resulting new product. Firms also understand potential strong negative consequences of non-transactional behavior, if not managed properly” (Verhoef, Reinartz, and Krafft, 2010, p. 248).

Non-media companies, therefore, recognise the content creative nature of new media. Just as Galpin & Gullen (2000) stressed that media metrics need to go beyond consumer size and characteristics to context, particularly to the conditions which lead to lower or higher attention, other marketers seek to understand the “specific roles of networks and structures and how different contexts influence customer-to-customer interactions” (Verhoef et. al. 2010, p.249 referring to the work of Libai et. al., 2010) created by new media. In order that this is measured, online behaviour is divided into the transactional and non-transactional. The non-transactional refers to user content and experience in much the same way that Berman et. al (2007) do. Any measurement in other areas of marketing which deal with non-transactional behaviour across media have direct bearing for media measurement.

“Kumar et al. (2010) [sic] strongly emphasize that ignoring customer engagement may lead to an undervaluation or overvaluation of customers. They introduce customer engagement value (CEV) as an overarching new customer value metric that includes both value from transactions (CLV) and value from non-transactional behavior. Importantly, they distinguish three non-transactional values: customer referral value (CRV), customer influence value (CIV) and customer knowledge value (CKV)” (Verhoef, Reinartz, and Krafft, 2010, p. 250).

The only measurement method that would enable such integration between brands, products and media channels would of necessity be multi-channel, as Franz (2000), Bronner, van Velthoven & Kuijpers, (2005) and Webster & Ksiazek (2012) state although none of these authors explicitly acknowledge the need for product and brands to be included.

Discussion and implications

Media fragmentation and data digitisation provide both threat and opportunity to audience measurement. The long tail is a sign of divergence yet it represents niches of more engaged consumers which mean more effective targeting and adspend. Some old solutions, such as media synergy, have great value in this space. The longstanding knowledge of the effectiveness metric of engagement can now begin to be tapped just as the industry is being pulled beyond the fundamentals of metrics on exposure.

While media are becoming more diverse, the need for greater uniformity in cross media measurement is felt. Single

medium metrics, such as AIRs do not enable effective cross media planning. There have been moves to create metrics which span media and thus enable better budget allocation between media.

Most universal currency measurement systems are still at an early stage when leveraging the new opportunities that there are in technology and a multi-media world. Engagement was once difficult to ascertain but this is far less so; return path data provide a means of accessing and measuring far into the long tail; furthermore a long tail means that there are more players in the media industry and these often are global and therefore require information all the more (Taneja & Mamoria 2012). The content pool is much wider than the traditional set of providers and now includes providers of platforms and technology companies (Taneja & Mamoria 2012) who must also be brought into the equation.

Survey and fusion approaches to audience information systems globally have begun to include engagement metrics through additional questions or electronically prompted responses during the day. Some have been extremely innovative in combining different sets of consumer information – media, attitudes, psychographics, products and finally actual behaviour through shopper cards. A few of the most innovative in the USA have made use of passive measurement, data fusion and path data. Passive measurement enables the three Vs of ‘big data’ to be best utilised and it also diminishes the problems respondents may have had with recall measures previously.

Taneja & Mamoria’s (2012) key take outs are that current systems should be integrated and enhanced rather than replaced; they provide a host of variables that make key marketing functions, such as consumer profiling, possible. When combined with digital and questions on engagement which span media, the quality of the exposure data which single source data provide is much enhanced.

Key issues

- Single source versus multi-source
- Baseline survey with data fusion with other media surveys
- The role of passive data collection versus recall surveys to optimise the potential of increasing information digitisation
- Incorporation of engagement based metrics which enable cross-media comparability

South Africa, like India and other emerging markets, does not have the degree of digitisation that more technologically mature and wealthier nations do. Nevertheless, mobile technology is fast leapfrogging the digital divide (Coul-dry, 2007) and is providing a means whereby data velocity, volume and variety can start to catch up to other more developed countries. The development of Green’s (2011) mobile device is a strong move in this direction. The future looks like a combination of an establishment survey providing consumer depth (attitudes, activities and similar) and media engagement metrics fused with other data sources where actual behaviour has been tracked digitally and then can be managed back to media use through analytics or other cross platform measures.

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