

## ENGAGEMENT WITH MEDIA BRANDS ACROSS PLATFORMS

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One of the most widespread and strategically-critical challenges facing media companies today is how to leverage their brands and their content across media and across platforms. Although “cross-platform synergies” are crucial to the strategies of many media companies and advertisers alike, relatively little is known about the relevant patterns of cross- platform behavior.

Consider the example of media brands with a print publication and a companion website. Most publishers go to great length to promote their website in their print publication, and to encourage the converse pattern of website visitors reading the print publication. Yet, key questions about the dynamics of cross-media behavior remain unanswered, such as...

- Do most consumers who touch a brand do so via multiple platforms? Or is it more common to visit one or the other? Is “cross-platform engagement” the norm or the exception?
- Do cross-visitation rates differ across categories? Are they higher for “enthusiast” categories and brands, or for general categories and brands?
- What best practices can be learned by examining brands that have particularly high cross-visitation rates?
- How do the demographic, psychographic, media and spending profiles of those “heavily engaged” with a brand across platforms differ from those who are less heavily engaged?
- How can those who are less heavily engaged be most effectively “encouraged” to sample other properties within a network?
- Are consumers more likely to visit brands across certain types of platforms? For example, is print-web cross-visitation more common than print-television or print-web?

### Assessing Cross-Visitation Patterns for Brands with Print & Web Platforms

We begin our analysis by examining data from the Ipsos Mendelsohn Affluent Survey – a 35-year tracking study of the lives, media habits and spending patterns of Americans making at least \$100,000 in annual household income. The Ipsos Mendelsohn Affluent Survey is well suited to this purpose as it has extensive batteries assessing print readership, television viewing, and web visitation for a variety of brands. We will use brands with both print and online editions. The 2011 Ipsos Mendelsohn Affluent Survey assesses 138 such brands. Readership of print brands was assessed with a “recent reading” method – respondents were asked about their readership of the past several issues or readership over the past several days, weeks, or months depending on the frequency of publication of a given publication. Website visitation is measured by asking respondents if they visited a given website in the past 30 days.

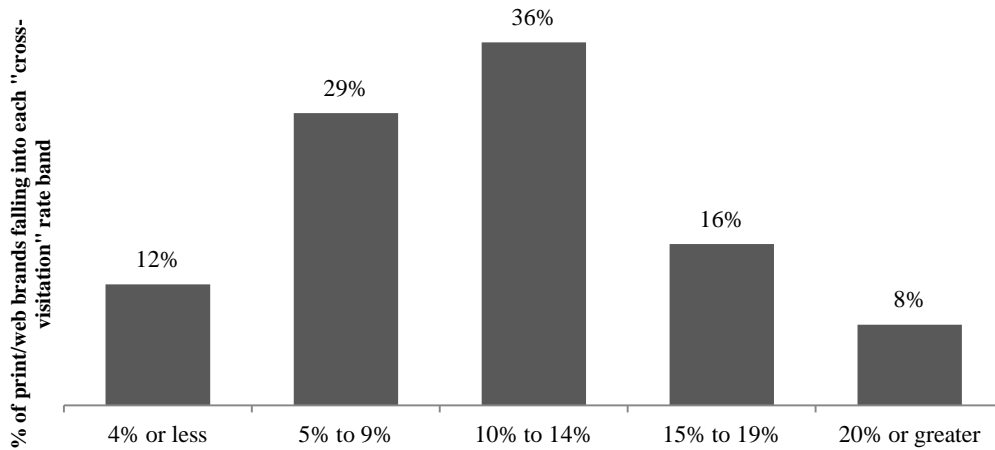
Obviously the print metrics and website metrics are assessed on different scales, and can’t directly be compared to determine which kind of property is “visited more often” (in addition, websites are “always available,” as opposed to print publications distributed on a regular schedule). Despite the lack of direct apples-to-apples comparability, these measures do provide insight into how many consumers are sampling a brand through multiple channels. Specifically, for each brand, we calculated a “cross-visitation rate” – in other words, what percent of those touching a brand through either platform actually touched the brand through both platforms?

*Key finding: Cross-visitation rates are, on average, quite low: only 11%.*

As the frequency distribution in the chart below highlights:

- 12% of print/web brands have cross-visitation rates of 4% or less
- 29% of print/web brands have cross-visitation rates of 5% to 9%
- 36% of print/web brands have cross-visitation rates of 10% to 14%
- 16% of print/web brands have cross-visitation rates of 15% to 19%
- Only 8% of print/web brands have cross-visitation rates of 20% or more

**Cross-visitation analysis: Print and Web**



**"Cross-visitation rates": % of brand consumers who touched brand via print and web**

Source: 2011 Ipsos Mendelsohn Affluent Survey

There are a number of possible reasons why cross-visitation rates are so low. One possibility is that not all publishers have optimized their online offerings for cross-media usage, ie. page layouts formatted for a computer screen don't translate well to the small cell phone screens unless they've been reconfigured for the small screen. Also, attention must be paid to the specific informational needs of the consumer. We know that demographics and media behavior differ between users of different platforms and their informational needs differ under different circumstances.

Another contributing factor to low cross visitation rates may be methodological. For example, print brand usage is usually based on the average issue audience of a publication where reading is captured over different time periods based on publishing frequency. The notion of "average issue audience" does not exist online. Website visitors are usually determined to be anyone who visited the website in the past 30 days.

Low cross-media visitation is not unique to print and website use. Findings for other combinations of media are virtually identical. Among the 89 brands for which we measure both TV viewership and Internet visitation, the average cross-visitation rate is 9%; among the five brands for which we measure TV viewership and print readership, the average cross-visitation rate is 15%. Furthermore, these results appear to be particularly robust over time. The analysis above is based on data from the 2011 Ipsos Mendelsohn Affluent Survey; an analysis based on the 2010 version of the survey yielded average cross-visitations that were essentially identical to those reported above.

Examining the top-performing brands on our print/web cross-visitation metric reveals several patterns, and offers insights for brands looking to enhance their cross-platform synergies.

- Several are periodicals with strong brand names known for excellence in reporting and analysis, including The Washington Post, The Wall Street Journal, Barron's, The New York Times, and The Economist. In some parts of the country, and for those in some professions, these titles may be considered "essential reading" (such as *The Wall Street Journal* among America's senior management and financial elite, *The Washington Post* for government decision-makers and policy wonks, etc.).
- Several are periodicals for "enthusiasts" in a "niche" passion such as running, tennis, yoga or piloting airplanes. In these cases, the niche nature of the topic not only attracts an enthusiast likely to seek out content in multiple places, but some of these titles also benefit from a relative lack of competition in a narrow field.
- Some of the top brands are airline magazines. In this case, a relationship with the brand is often driven by living in (or travelling to) a specific destination. Moreover, their websites provide valuable functionality beyond simply published content; they offer the potential to check/gain frequent flier miles, to purchase discounted airline, and a variety of other transactions.

**Profiling Cross-Visitors Vs. Silo-Visitors**

The data suggest that “cross-visitors” – those who engage with a brand both in print and on the web – often skew toward being high-value consumers who are particularly attractive to advertisers. For example, in the case study below of a national financial publication, cross-visitors who engaged with the brand through both print and web have a more attractive financial and career profile. Attitudinally, cross-visitors display a comfort with technology, an enthusiasm for the finance category, and a globally-oriented perspective. Print-only readers skew older, and have more traditional attitudes related to technology, new experiences, and new socio-political paradigms.

	Interact with financial media brand via...		
	print & web	print only	web only
Average spending across 130+ categories (\$000)	\$101	\$91	\$73K
Average HHI (\$000)	\$275	\$243	\$214
% using a broker	62%	48%	42%
% who manage / trade securities	14%	7%	7%
Average age	45	50	45
People often ask my advice about financial issues and investing	48%	31%	34%
I enjoy eating foreign cuisines	71%	57%	65%
I prefer to buy American-made products	43%	59%	52%
Overall, globalization is a good thing	53%	37%	48%

Source: 2011 Ipsos Mendelsohn Affluent Survey

Some elements of this profile may be publication-specific and/or category-specific, and of course, the findings in this table are ultimately correlational – we can’t assume that cross-visitors have higher income because they are more engaged with Brand X. It seems more likely that people with significant involvement in the categories of money and finance are likely to connect with a strong brand in multiple ways. By the same reasoning, we can’t necessarily expect that the demographics of “silo visitors” (those who engage via a single channel) to suddenly mirror those of cross-visitors if they begin engaging in multiple ways. Still, multi-channel engagement obviously brings a stronger consumer-brand connection, and is a reasonable goal for media brands to pursue.

It seems that profile qualities – siloed vs. cross media – vary by each publisher brand even within one category. The following table uses the net audience of the print and web combination profile of each brand as benchmarks and compares ‘print only’, ‘online only’ and ‘print and online duals’ of four news publishers. Looking at the key demographics below, it can be observed that the dual audience is not consistently the strongest audience segment across all titles.

	The Wall Street Journal			The New York Times			Washington Post			The Economist		
	Print only %	Web only %	Print-web duals %	Print only %	Web only %	Print-web duals %	Print only %	Web only %	Print-web duals %	Print only %	Web only %	Print-web duals %
Men	-13	+3	+16	-7	+2	+11	-14	+2	+8	-9	-3	+17
Average HHI	+7	-13	+19	+23	-10	+2	+15	-11	+10	+14	-11	-9
Postgraduate degree	-4	-1	+11	+/-0	-2	+12	-5	-1	+6	+11	-4	-11
Top management	-5	-3	+17	+15	-12	+14	-12	-4	+19	-1	+2	+/-0
Influentials <sup>1</sup>	-1	-5	+15	+24	-21	+25	-22	-8	+36	+2	-14	+13
Average liquid assets	+7	-13	+20	+72	-31	+5	+50	-22	+1	+29	-16	-24
Average consumer spending	+5	-10	+17	+14	-7	+3	+10	-5	+1	+3	+3	-8

Source: 2011 Ipsos Mendelsohn Affluent Survey

When it comes to the media usage behavior across these brands, the variations continue. But more importantly, there is no clear indication that cross-platform users have a consistent likelihood to be heavy media users of any kind. No clear trend can be recognized when we are looking at the ‘heavy’ quintile for Print, TV, Radio or the Internet.

<sup>1</sup> 3+ public activities in the past 12 months (excludes voting)

	The Wall Street Journal			The New York Times			Washington Post			The Economist		
	Print only %	Web Only %	Print-Web Duals %	Print only %	Web Only %	Print-Web Duals %	Print only %	Web Only %	Print-Web Duals %	Print only %	Web Only %	Print-Web Duals %
<b>Heavy<sup>2</sup> print readership</b>												
# of titles	+23	-26	+26	+40	-27	+25	+36	-22	+14	-5	-9	+17
# of issues	+28	-32	+33	+43	-35	+38	+46	-29	+19	+17	-28	+6
<b>Heavy<sup>2</sup> TV viewership</b>												
Cable TV	+9	-7	+2	+51	-15	-14	+26	-22	+22	-8	+21	-11
Broadcast TV	-18	+4	+21	-7	-3	+14	-16	+3	+10	-22	+24	+4
<b>Heavy<sup>2</sup> radio usage</b>												
# of internet hours	-18	+4	+21	-7	-3	+14	-16	+3	+9	-22	+24	+4
# of internet sites	-51	+28	+15	-36	+10	+11	-50	+21	+2	-46	+42	+21

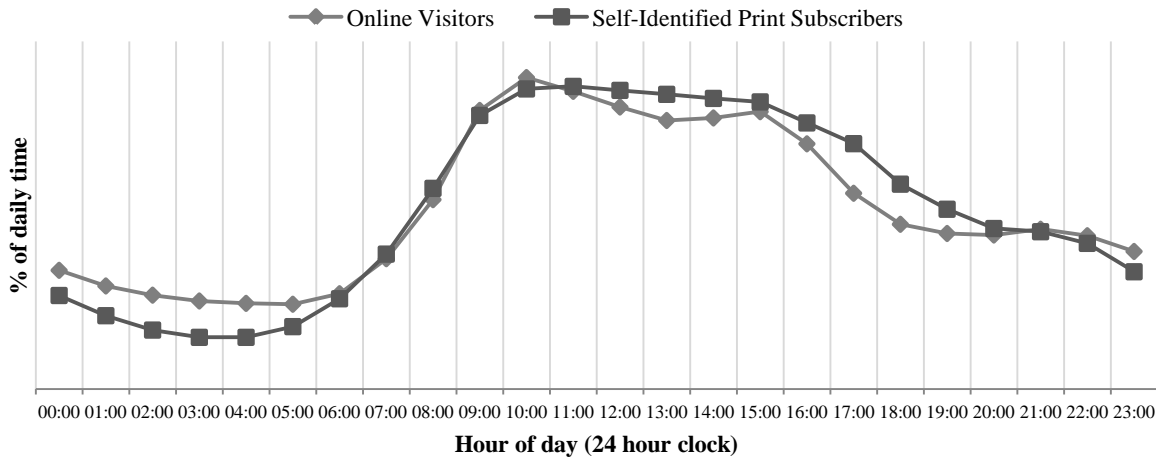
Source: 2011 Ipsos Mendelsohn Affluent Survey

The dissimilarities in demographics and the inconsistencies in media usage make it essential for each publisher to assess what media elements and features draw readers and visitors to each platform.

How engaged silo and cross-platform users are with each publisher’s platform(s) cannot not be examined through syndicated sources at this time. However, internal records based on Omniture show that online users who identified themselves also as print subscribers tend to visit nearly three-times as many pages per WSJDN visit than visitors who are not identified as print subscribers. But there is no significant difference between WSJ cross-platform users who identified themselves as frequent print users (5+ issues per week) and occasional print users (less than once per week) in their online page views. This leads us to question whether the level of engagement with one platform correlates to the engagement with the other platform. While we are able to examine behavioral data for online and self-identified print-online users for their WSJDN visits, we must rely on self-reported data to gauge how much time print-only subscribers (average 58 minutes) and print-online dual users (average 60 minutes) spend with the print Journal.

The timeline outlined below suggests similar behavior patterns between online-only and self-identified print subscribers, when it comes to the time of access.

### Timeline of WSJDN Online Visits



Source: Internal Records, Omniture

<sup>2</sup> heavy = top box

While the demographic profile of silo and cross-platform visitors differs, the usage behavior among those who are online visitors – silo and cross - is similar, the only significant difference is the amount of content consumed per visit as documented by page views. This allows for the assumption that usage behavior is not completely determined by the consumption habits of the users – siloed or cross-platform - but that it is also strongly determined by the platform itself.

How the inclusion of an additional media platform – for example mobile - influences the media usage of a particular brand cannot currently be examined through syndicated research resources. Instead, we are using the results of the 2011 Wall Street Journal Mobile Survey, to document the following demographic overviews:

	Print only %	Print and online (no mobile) %	Print and any digital incl. mobile %	Print and Mobile and tablet and online %	Online only no print %	Online and mobile (excl. tablet) %	Online and Mobile (incl. tablet) %	Tablet no print, no mobile %
<i>Columns</i>	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>G</i>	<i>H</i>
Men	83	83	86	90	91	89	94	82
College +	91	91	92	97	87	87	88	92
Employed	52	56	70	90	76	76	86	71
Retired	48	40	25	7	21	15	9	18
Top Management	58	48	54	62	29	42	53	62
Average HHI	\$188,000	\$171,000	\$232,000	\$284,000	\$118,000	\$183,000	\$254,000	\$220,000
Average age	63 years	59 years	55 years	49 years	53 years	49 years	46 years	51 years

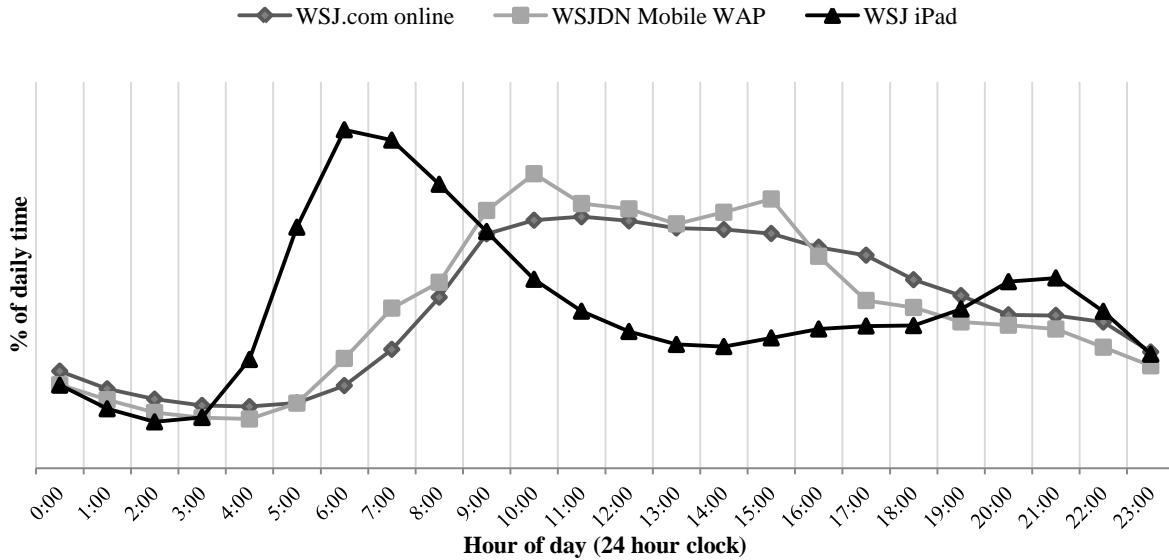
Source: 2011 WSJ Mobile Survey

WSJ cross-platform users seem to have a more affluent profile than siloed users. But other key demographics such as age and education seem to be strongly impacted by the media platform. For example, print-only readers tend to skew older, but are very highly educated and although they are less likely to be employed, they tend to be more affluent than their online-only counterparts. While we see a progression in columns A-D on the above table for household income it seems that the inclusion of mobile will skew the respondent profile younger and helps lift the income of online users, demonstrated in columns F and G. The only silo usage that doesn't exhibit the 'low' income levels is tablet-only usage shown in column H. The higher out-of-pocket costs of the device seem to skew the demographic profile more affluent and slightly higher in age than the mobile-online users. It is expected that a decrease in tablet costs will also result in a decline of the affluent measures for tablet users.

It seems impossible to portray a 'mobile only' siloed user, since mobile users tend to be heavy online users in general suggesting a 'natural' cross-visitation between mobile site/app and online site of a media brand.

The distinct differences between siloed users' profiles suggest that additional digital platforms should assist publishers in attracting newer – may be even younger - audiences. But it seems that the media content will determine when the user is consuming the content and what platform will be chosen. This makes it basically impossible to estimate the actual growth per additional platform.

The chart below visualizes at what time of day visitation of the online, mobile WAP or iPad platforms occurs within The Journal Franchise. Users portrayed below can be siloed or cross-platform users as documented through internal records based on Omniture and Localytics. The distinct differences for each platform suggest that usage behavior differs by platform even within the same content family.



Source: Internal Records, Omniture, Localytics

**ONE fundamental question remains: Why is cross-visitation so low?**

Speculations about cross-platform synergy isn’t new. But cross-platform dynamics have, over the years, proven to be subtle and more challenging to capitalize on than many expected. To better understand cross-platform dynamics, we asked our survey respondents: “What thoughts, if any, do you have about the websites associated with magazines and newspapers?” (We also investigated cross-platform dynamics between television networks and websites, but this paper focuses primarily on print and digital). Below, we outline five key factors that likely contribute to relatively low average cross-visitation rates.

**1. A preference for one format over the other.** To some extent, low cross-visitation is a symptom of the fact that many consumers simply prefer one format over the other, and much of this preference is generationally driven. We saw in the table above that print-only readers skew older, while web-only readers skew younger, mirroring one of the most fundamental trends reshaping the media landscape today. As two of our research participants put it:

- *“For the younger generation who are very ‘mobile’ this is a great way of communication, I am conventional and prefer a paper.”*
- *“When they stop making hard copies I’ll use the internet to read them. Til that time I’ll continue to enjoy a cup of coffee with my newspaper or magazine in my easy chair.”*

**2. Perceived redundancy.** Some consumers consider cross-visitation to be a poor use of their time, because they feel both formats will provide the same content.

- *“I try not to look at the magazine websites because... I’ve already seen the hardcopy material by the time I get around to reading it”*
- *[cross-visitation] “would become TOO REPETITIVE”*
- *“There is usually a lot of duplicated information from the print magazine located on the website. I sometimes wonder why I pay for a magazine when I can get the same content for free on-line. Newspapers are more guarded in their content on-line*

**3. Digital benefits are “nice to have” and “used occasionally”.** Consumers are well aware of, and appreciate the benefits often provided by digital media properties. When asked about the websites associated with magazines and newspapers, many cite benefits such as archiving, search functions, discussions, and access to breaking news. These benefits typically aren’t viewed as “must have,” nor are they necessarily used frequently – both factors inhibit cross-visitation. Still, consumers see tremendous value in them regardless.

- *“Good way to expand on ideas or areas that they could not cover in limited space in magazine-- good way to get blogs-opinions from readers*
- *“Convenient when I’ve missed an article of interest.”*
- *“Good search ability - unlike hard copy”*
- *“Good source for breaking news during the day”*

**4. A preference for the “editing” function of a search engine.** Perhaps the most fundamental strategic challenge facing media companies today is their historic role as “category editors” or “curators of information”. It seems fair to say that media brands are not as top-of-mind as search engines in the process of how consumers typically seek information. For example, less

than half of consumers agree with the statement: “When I am looking for a website on a specific topic, I often try to think of which magazines and newspapers might have an appropriate website.” It may not necessarily be that consumers have more confidence in a search engine algorithm than in a human editorial staff. It may simply be a matter of convenience, and a matter of conserving mental resources in busy lives; remembering a single search engine that works across categories may simply be easier than trying to recall what media brand might offer reliable content and editorial excellence.

- *I would just Google for information and not go to a magazine or newspaper website unless I needed that specific article.”*
- *“I search websites by topic, not source.”*

**5. Many brands don’t inspire cross-visitation.** Fundamentally, cross-visitation is an expression of liking, or at least respecting, the brand in question. And the unpleasant reality is that many brands simply don’t connect with consumers powerfully enough to inspire the desire for a deeper engagement of any kind, whether it is cross-visitation, repeat visits, becoming a print subscriber, and so on. In the online realm, the websites of established print publications do benefit from something of a halo effect which they can use in positioning themselves against many web-only properties. For example, most consumers agree “The websites associated with magazines and newspapers tend to be very high quality” and much less than half agree “Magazines and newspapers should stick to what they do best, and not try to branch out into websites.” Ultimately, much depends on the power of the brand and the quality of the experience the brand provides. Indeed, when asked about the websites associated with print publications, consumers drew sharp distinctions between brands perceived worthy of cross-visitation, and those that are not.

- *“Some, like the NY Times, are well done, though invariably more difficult to navigate than simply turning the page of a hard copy. Others, such as the websites of regional magazines, are poor, messy repeats of the print edition*
- *The Wall Street Journal is the only one I think is high enough quality to be worth spending the time on. Others are too hard to navigate.”*

An additional question needs to be addressed: Should publishers encourage higher cross-visitation and, therefore, larger duplication numbers, or should publishers focus on audience growth and encourage siloed usage to grow the overall brand footprint?

While advertisers seem to focus on additional audience reach through new platforms, it seems necessary to re-focus on the question of advertising frequency. Is one exposure enough or should advertisers aim for multiple exposures in a cross-platform environment. The earlier shown platform timelines suggest that advertisers could expose their message at different times of the day to an audience with varying mindsets, which could function as a media-mix within the total brand footprint.

In print the long-standing thesis of ‘effective’ reach tends to help media planners gauge the impact of a print schedule. Online media allows, through frequency analysis of control and exposed groups, assessment of the impact of multiple exposures. It is at this point challenging to gauge the aggregated impact of a cross-media plan vs. individual siloed usage under consideration of multiple frequencies.

In any case, if publishers cannot prove the actual audience increase for each platform addition, or if publishers only manage to strengthen the brand relationship with existing audiences by growing cross-platform use within their footprint, it will become essential to establish additional dimensions of advertising impact beyond audience reach.

### **Investigating the added dimension of the Smartphone**

It’s interesting to note that, even as we tackle the thorny question of print publications and their websites, the rapid growth of smartphone usage has changed the picture yet again.

The smartphone - along with its younger brother, the tablet PC – brings another platform into the mix. Using these devices a consumer can choose to visit the web- or WAP site. However, in many cases (including that of The Wall Street Journal), the consumer also has the choice of downloading an application (‘app’). Generally these ‘apps’ give access to a version of the publication that has been optimized for the device, providing an experience that is somewhere between the traditional print publication and the website.

From the consumer’s point of view, these ‘apps’ could well offer the desired combination of immediate, regularly-updated access coupled with a more print-like format. For the researcher, however, smartphones bring a host of new challenges. Smartphone usage tends to be more fluid and flexible than print or even ‘traditional’ internet use. In even the most exacting diaries respondents can struggle to accurately record their smartphone use, often failing to record application usage as ‘online’, mixing up app and ‘traditional’ online use, and forgetting the quick, ‘snacking’ content consumption that is associated with these devices.

Accurately measuring use of smartphones through traditional methodologies has many pitfalls, therefore. This is one key factor behind Ipsos’ partnership with Zokem, a leading provider of passive mobile metering technology. Zokem’s mobile meter records more than 50 separate behaviors on a smartphone, recording and reporting everything that the device is being used for

at all times. This technology is still in its early stages and has yet to be implemented on a large scale; however, Ipsos has access to Zokem’s 5,000 strong panel of smartphone users in the US. Using this data source we can begin to explore the impact of the additional platform provided by the smartphone, the app, and investigate how it may differ from the more ‘traditional’ website use.

**Websites vs. Applications: A question of reach vs. time spent**

Taking a broad view of the data, we can look at differences between usage of ‘traditional’ websites and equivalent applications in a number of key content categories. The first point to note is one of reach. In almost all cases smartphone users are more likely to access the content category through the ‘traditional’ website rather than through applications. In most cases – news and information being a case in point – the number of people accessing related content through the website far outstrips the number of people accessing through an application.

	Reach		Index time spent, app/browser
	‘Traditional’ website	Application	
News and information	88%	11%	99
Commerce	75%	50%	222
Social networking, general	75%	83%	610
Finance	73%	26%	60
Entertainment, general	67%	54%	227
Gaming	25%	68%	3,482
Sports	24%	12%	195

Source: Zokem’s Mobile Life Panel in the US, August 2011

The only two categories in which this does not hold true are social networking and gaming. Gaming is a category that offers a markedly different type and range of activity through applications. Social networking is somewhat different, driven primarily by Facebook. It is the huge take-up of the Facebook application (with more than 250,000 regular users worldwide) that drives this anomaly.

Application: Top 10	Reach - % using application per month
Facebook	80
Youtube	44
Pandora radio	26
Groupon	20
Twitter	18
Skype	16
Amazon	16
TWC	16
Wordswithfriends	16
ebay	14

Source: Zokem’s Mobile Life Panel in the US, August 2011

So the first learning is that mobile websites/WAP sites tend to have a far greater reach than the equivalent applications. It should be considered that the number of smartphone apps in some of these categories is rather limited, which contributes to the lower reach of apps. However, we can see in our data that the opposite is the case when we consider the time smartphone users spend with content. Here we can see that the balance is usually in favor of the application.

If we focus again on social networking, we can see that the index of time spent on social networking applications versus time spent on social networking websites is firmly on the applications’ side. The average smartphone user spends over six times longer using social networks through a smartphone-based application than they do accessing the website through the same device.

This pattern is repeated across all the key content categories, with the exception of news, information and finance. These are categories that are potentially more bite-sized or time-critical. They tend to have low reach of ‘applications’ and these



‘applications’ do not always carry a significant time-premium compared to the mobile website/WAP alternatives. We see great variation by specific site in these categories, so by focusing on one specific site we can begin to draw out additional insight.

**The Wall Street Journal: wsj.com and the WSJ application**

The Wall Street Journal’s two smartphone-accessible properties – its mobile website, WSJ.com, and its application – in many ways act as a good indicator of how quality print journalism behaves in the new smartphone-enabled world. Even through a smartphone, it is far more likely that a Wall Street Journal user will consume content via the ‘traditional’ website than through the application. Over twenty-three times more likely, in fact.

Monthly reach - Index WSJ.com / WSJ application	2,350
Percentage of WSJ application users who also access WSJ.com	38%
Monthly time spent using - Index WSJ application / WSJ.com	283

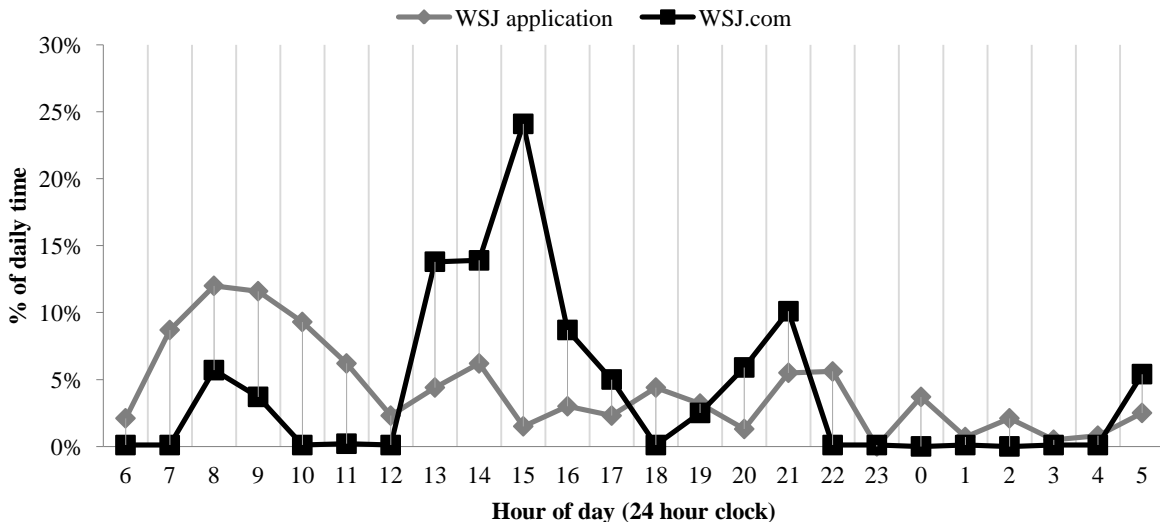
Source: Zokem’s Mobile Life Panel in the US, August 2011

It is important to note that WSJ.com app access is subscription based, not included in the standard online subscription. Therefore, higher WAP usage might be a function of pricing. Also, wsj.com only introduced its Android app earlier in 2011 so its penetration in the Android-heavy smartphone market may still be perceived limited.

This implies that only a small portion of smartphone users who access WSJ.com on their device also have the equivalent application installed. Turning this around, however, we see that over a third of Wall Street Journal application users are also users of the mobile website, WSJ.com. Despite the fast pace of growth, it is early in the lifecycle of smartphone applications, and it is too early to say if this degree of overlap is high or low. It’s not atypical of what we currently see in general. Therefore, it is interesting to consider whether the mobile websites and their equivalent applications are being used in different ways.

Digging deeper into app usage, we see that the application - although used by fewer smartphone owners – is clearly used for a longer period of time than the ‘traditional’ website. WSJ application users spend, on average, three times longer per month with the application than WSJ.com users spend with the website. The mobile website may currently have a perceived advantage in terms of reach but, for those who use it, the application has the edge in terms of time spent.

Of course, the really valuable aspect of passive measurement is not just in accurately measuring who uses an application or a website and for how long. The data is being recorded continuously and we can, therefore, begin to understand when each type of smartphone access is being used. Collecting this type of data requires very large panels of respondents who have the mobile meter enabled on their smartphone, and is in its early days. However, using the Zokem Mobile Life Panel we are able to examine those who use the ‘traditional’ website of The Wall Street Journal and its equivalent application. While sample sizes are relatively small, initial insights do present themselves.



Source: Zokem’s Mobile Life Panel in the US, August 2011

The data suggests that, not only does the reach and time spent differ between the mobile website and the application, the time of day that each is used also differs. The website appears to be used for more concentrated, periods of time at the start of the day, in the middle of the day and nearing the end of the day. The application appears to be used in a relatively concentrated fashion at the beginning of the day but is then used in a more frequent, short ‘snacking’ fashion throughout the day.

While smartphone usage behavior could be addressed within this paper, the usage of tablets and its ramifications for the media industry have yet to be fully explored. What has become very clear in the 1 ½ years since the launch of this device is that it does not seem to fall into the existing categories of online or mobile. It seems to be somewhat of a hybrid of online’s flexibility combined with the mobility of print. This makes it essential that the research community assess whether current media metrics can/should be used for tablet audience measurement.

While this area is rapidly developing, it is fascinating to consider that new devices such as the smartphone and the tablet are extending the question of cross-visitation even further. Not only does the smartphone bring a new platform for a specific publication but with these new platforms come completely new media behavior. In turn, this creates questions of measurement that we have only just begun to tackle in ways very different from our traditional methodologies. With the predicted growth of tablets, the industry is going to keep evolving over the next few years. The challenge for research is keeping up with these developments and making sense of the new avenues for data exploration that this will bring.