FPS
International Structures
and Methodologies
July 2013

Contents

Kuper
Research

JICS: Kuper Research visits

Medium	Country	JIC/ORG	Person	Position
TV	Holland	SKO	Bas de Vos	Managing Director
TV	UK	BARB	Simon Bolus	Research Director
Print	Holland	NOM	Irena Petric	Director
Print	UK	NRS	Mike Ironside	CEO
			Katherine Page	Technical Consultant
Online	UK	UKOM	James Smythe	General Manager
Radio	UK	RAJAR	Jerry Hill	CEO
Outdoor	UK	Route	James Whitmore	Managing Director
Multi-media	Germany	AGMA	Jurgen Wiegand	CEO
			Gabriele Ritter	Head of Department
Multi-media	Swiss	WEMF	Harald Amschler	Head of Research

Kuper Research

TELEVISION

Company: **Stichting KijkOndersoek (SKO)**

Country: The Netherlands

Person: Bas De Vos – CEO

Function: TV audience measurement

Administration

Stakeholders:
- SKO is a non-profit organisation, organised as a JIC.
- Stakeholders include:
  - o Netherlands Public Broadcasting (NPO)
  - o Association of Dutch Advertisers (BVA) - advertisers
  - o Platform of Media Consultancy Agencies (PMA) – media agencies
  - o Organisation for Promotions and Optimisation of Television Advertising (SPOT) – commercial broadcasters
- Shareholders include advertisers, broadcasters, sales houses, buying/planning agencies
- The advertisers sit on various JICs across all media.
- Stakeholders meet monthly.

Technical/Research Committee (8 people):
- 4 broadcasters
- 4 advertisers
- These comprise of researchers and marketing services personnel
- Outside statisticians are brought in and paid for separately if required for complex situations e.g. multibasing or fusion assessments.

SKO staff (5 people):
- 2 researchers/methodologists (1 being a research director)
- 1 information director (communications and website)
- 2 admin staff
- A new position will include a project manager
- The advantages of a TV JIC such as SKO are the level and depth of involvement in innovation and control.

Funding:
- Annual budget paid for primarily by the broadcasters
- Proportions are allocated according to the extent the data is used

Contractors involved in providing television audience measurements:

A variety of contractors are commissioned to undertake various parts of the research process. Each has their own expertise, but it is essential that they all work together to provide an extensive and intensive understanding of the TV audiences.

1. Intomart GfK:
- Selects and recruits homes for the TV panel survey and provides the measurement equipment.
- They manage the panel and do quality control and other ad hoc research if required.
- Technique used – Enhanced Audio Matching (EAM) developed by Intomart GfK .
- In 2011 the picture matching module started being phased out and the watermarking technology of Metric Line will take its place.

2. The Nielsen Company:
- Audit the broadcast information.
- Responsible for the registration, classification and harmonisation of broadcast information.

3. TNS Nipo:
- Responsible for the establishment survey – The Media Standard Survey (MSS).
- This is in collaboration with all media JICs in The Netherlands.
- Provide SKO the addresses to recruit the panel.

4. Nedstat comScore:
- Measures streams of television programmes on the internet (WEB-TV) as an additional project (satellite) to the TV audience services.
- Intomart GfK provides the WEB-TV reports.
- Nielsen provides the programme titles matched to the requested streams.

Research and methodologies

1. ESTABLISHMENT SURVEY [THE MEDIA STANDARD SURVEY – MSS]: AMPS performs this function to a large extent.
- An annual survey since 2011.
- In collaboration with all media to create a common understanding between JICS.
- All JICS sign the contract for this survey.
- The survey is conducted by TNS Nipo.
- The survey is used as a source of census information on demographics and to monitor changes in media equipment ownership and media usage.
- The objective is to take stock of all characteristics of Dutch households, which directly or indirectly are related to TV and other media equipment. The survey helps track trends in TV viewing behaviours.
- The survey uses a national representative sample and the universe consists of all persons 13 years of age and older living in private households.

Relationship to the TV Panel
- The sample preparation for the audience research (TAMS) is based on the results of the MSS. Universes are obtained for

weighting and panel control purposes.

- The MSS also provides the addresses for recruiting the households for the TV panel.

Methodology: multi-methods are used – online, face-to-face, telephone and self-completion

- Homes are given an introduction letter to ask them to participate. If there is no response they will get a call back to encourage participation. (60% response rate)
- Probability sampling is based on postal codes which are an advantage for most European countries.
- This is not fused with the TV panel.

THE MOA GOLDEN STANDARD

- The composition of the universe of the Establishment Survey is based on the annual MOA Golden Standard data.
- The Golden Standard is a calibration tool for national and regional sampling in the Netherlands.
- This a tool developed by the Market Research Association (MarktOnderzoekAssociatie -MOA) in collaboration with the National Statistics Agency (Centraal Bureau voor de Statistiek -CBS).

2. THE TV PANEL

- The panel represents 15.8 million Dutch households (including non-TV households).
- The sample consists of approximately 1,235 households and 2,800 individuals aged 3 years and older.
- Households are selected from the MSS survey and are representative of the population on a number of characteristics, for example, region, household life cycle, education of the head of the household and ethnicity.
- Intomark GfK carry out the recruiting through a 65 cell matrix based on the above mentioned characteristics.
- Estimates for the large majority of panel controls are available through the MOA Golden Standard.
- Each TV set, VCR, DVD player and/or recorder, VCR and hard disk recorder in the household is connected to the meter.
- Viewing through the TV set, video, DVD or PVR, hard disk and uses other than live TV viewing are registered second by second. Results are available the following morning.

Auditing/Monitoring:

- Continuous controls on the representativeness of the panel on relevant characteristics are carried out by Intomart GfK, SKO and its technical committee.
- Full audit of progress second by second.
- A daily balance of the panel using an online tool built by GfK allows SKO to look at the raw data - viewing and devices in household.
- Each month GfK reports on the panel composition to the technical committee.
- Other quarterly or half yearly report checks.
- Reliability thresholds are monitored.

Panel maintenance and incentives:

1. On recruitment each household member is questioned on a large number of characteristics. At least once a year they are re-questioned.

2. Panel membership lasts for a maximum of five years.
3. Panel members are compensated by having their yearly costs paid for electricity used by the data collection set.
4. Members receive an audience research journal/newsletter quarterly. This includes the results of a lottery draw of €450 run every 3 months for one lucky member.
5. Children are given presents and every member receives a birthday and Christmas postcard.

Validation and weighting:

- Despite the high daily response weighting is necessary to compensate daily fluctuations in the sample.
- Weighting guarantees a representative panel on individual characteristics such as education, household size x social class, age x gender, position in household and region.

3. BRIDGING THE SILOS

- All 4 audience measurement JICs work together when required – radio, internet, print and TV.
- The MSS is an example of this.
- Over and above this they do collaborate on projects that will be beneficial for cross media.
- For example, SKO collaborating with STIR (online JIC) on the WEB-TV research.
- All 4 services use the same lifestyle classification developed by the NPO.

Strategy and Innovation

- SKO is responsible for innovation research projects.
- The core of the audience measurement is the common currency (total viewing).
- This includes:
  o Guests viewing in the household which measure their own age and gender and assign the viewing of guests to panel members with the same demographics who are not watching at that time – a proxy viewer.
  o Time shift viewing on the day of broadcast and the six days that follow (including non-TV homes).
- Other relevant ways of TV viewing are not ignored. SKO builds projects around these in the so called satellites. They offer the possibility to investigate new forms of viewing behaviour without influencing the core measurement.
- These satellite projects include the
  o SKO WEB-TV measurement
  o SKO Mobile project

INNOVATION

- As in S.A. the most important recent developments in TV viewing are:
  o Increasing time shifting viewing through PVRs and set to boxes
  o Increasing numbers of digital channels
  o Increasing reach of TV viewing through the internet

SATELLITE PROJECTS

1. Time Shifted Viewing

- Has been included in the ratings since 2008.
- Time shift viewing on the day of broadcast and the six days that follow.
- Ratings are consolidated after 7 days.
- Consolidated figures include live as well as time shifted viewing.
- In the daily reports, provisional figures are reported.
- Overnight reports include the viewing behaviour on the day of broadcast, eg at the moment of broadcast (live) or viewing-on-the-same-day-as-live (VOSDAL).

2. SKO-Digital

- SKO started a pilot measurement with 39 exclusively digital channels in May 2008.
- The establishment of reach reliability thresholds made it possible to report on these channels with the need to disproportionately increase the share of digital homes in the TV panel.

3. WEB-TV

- SKO commissioned Nedstat comScore in collaboration with Intomart GfK to monitor viewing of TV programmes through the internet.
- This measurement is not conducted through the television panel used in ratings research, but through server based pixel techniques.
- At present the streams of TV programmes available through the catch up service sites of SBS Broadcasting, RTL Nederland and the Netherlands Public Broadcasting are measured.
- Only streams of broadcasts offered integrally on the catch up sites are measured.
- comScore gathers information on viewers' behaviour in playing streams. This playing behaviour (measured for all requested streams of the channels participating in the project) is measured using Stream Sense. This measurement takes into account all streams played through the (un)embedded players offered by the channels involved.
- Several techniques are necessary to be able to measure stream playing behaviour. comScore has bundled these techniques in its Digital Analytix-suite. Digital Analytix (DAx) produces measurements by installing measuring codes.
- DAx uses cookies to identify browsers or computers. When users visit the website, a cookie is left behind on their computer. This enables DAx to recognize users who visit the site more than once or if they are new users.
- In case the user does not allow cookies, DAx will try to identify him through IP address and User Agent information (e.g. browser type, operating system, version check, etc.).
- The next steps are measuring stream playing duration and other stream types, such as segments or live streams.
- This project is stand alone and not part of the daily rating. The ultimate goal is to have a common currency. If this has scale then they will determine ways of calculating reach and frequency.
- Web TV is the first and biggest project – the strategy is to have online video ratings
- This will measure TV viewing live/time shifted online but at this stage are not part of the daily ratings.
- comScore measures 'in player measurements' and are currently only measuring top 10 channels.
- The various channels put tags on their streamed data in order for comScore to pick up online viewing. Nielsen harmonises the tags into a code.
- To date they only have numbers viewing but not who they are.
- Reporting: a daily WEB TV report is available.
- Reports on the total number of stream starts of TV broadcasting on the broadcast day and the following six days are presented next to the regular viewing figures of the broadcasts.
- **Mandate:** to deliver video ratings to combine online and offline ratings.
- Not able yet to pick up internet users on mobile or iPads. They are working with the cable suppliers.
- Can however, start to measure APPS on iPhones and iPads. In 6 months they should be able to measure TV viewing as well as HTMLs.

SKO to develop multi-platform online video rating

- This year SKO will start with the development of platform independent video ratings.
- This effort is prompted by the evolving viewing behaviour of the audience.
- The penetration of online devices as a means to watch video is increasing rapidly; as a result the measuring of traditional offline television content alone can no longer provide an accurate representation of viewing behaviour.
- Measuring viewing with regards to professional online content and online commercials should enable the expansion of its existing ratings portfolio and to draw conclusion as to total, online and offline, viewing behaviour: The Video Total.

The 3 priorities are:

1. Measuring viewing of live streams of television channels, hosted by networks.
2. Measuring the number of times online commercials (offered by TV channels and other online video suppliers) were actually played.
3. Expanding the current SKO WEB-TV project to include more types of online content, including non-broadcast content.
- These are currently in the tender phase.

Online Panel:

- Once a year an online panel, owned by the online JIC runs a panel for one month.
- Includes a product and lifestyle interests and others online – this is a self-completion annual survey. Lifestyle types are established from this.
- This is not fused but would like to be able to combine with TAMS in the future.

Video Data Integration Model:

- TAMS is the central hub of TV data.
- Online census data (to be imputed onto TAMS).
- Respondent level data to establish reach.
- Respondent data imputed to census data – hooks from TAMS pen / time budget study.
- Goal is to have a cross channel rating for advertisers – offline and online. Total audience on different platforms.

Innovation and future focus

Future Projects/In Test Phase:
- Time budget survey using Touchpoints with a weekly study of media usage.
- Virtual meters in 30 homes for testing online usage (not the TV panel)
    - o Members of the panel will use the device on their computers to measure TV viewing online by matching audio patterns.

Future scenario experiments:
- Continual exploration
- If Board is provided with a good proposal for investigation they will get commitment and funding from the Board.
- Approx 5% of annual budget is used as a contingency for ad hoc surveys.
- Stakeholders insist on ad hoc projects to identify new realities.

Innovation:
- The stakeholders motivate innovation.
- SKO are given the freedom and funding to investigate.
- They may fail many times till they reach a turning point.
- Have been experimenting for 5 years on online measurements and now need integration of time shifted viewing online.
- Started lean and mean on future proofing explorations.
- Most ideas come from Media Standard Survey.

Moving Pictures:
- Adhoc survey
- Devices are provided to 1000-1500 people and measure content watched yesterday.
- Spots trends
- Online questionnaire
- Measures types of video content (TV and user generated) by types of devices.

Separate surveys:
- Time budget study
- Data fusion
- Day in the life

Company:	**British Audience Research Board (BARB)**
Country:	United Kingdom
Person:	Simon Bolus – Research Director
Function:	TV audience measurement

Administration

Owners (9 members):
- BARB is a non-profit organisation
- BBC
  2 members
- iTV
  2 members
- The Institute of Practitioners in Advertising (IPA)   2 members
- Channel 4, Channel 5 and BskyB
  1 member each
- + ISBA (Incorporated Society of British Advertisers)
  1 member non-voting

BARB staff (9 people):
- 1 CEO
- 3 in research (1research director and 2 others)
  o Ensure contractors are delivering
  o Develop the service and steer the strategy by identifying needs, techniques and testing
  o Respond to queries from broadcasters
- 1 assistant/office manager
- 2 in finance
- 2 in commercial/client service capacities

Funding:
- Funding is decided by the Board
- Research and development budget is included
- Data is sold to all broadcasters who are not members. Costs are determined by the size of the broadcaster.
- If a channel is interested in subscribing they are given a 4-week test period to decide.

Contract Evaluation Committee (CEC):
- This committee create research policy.
- It steers development and strategy, e.g. the web panel being tested on 10% of the panel.
- They meet monthly or fortnightly depending on what is happening.
- Can decide if money gets spent on innovation and development.
- Representatives from each of the six organisations that underwrite BARB are represented.

Technical group:
- Meet twice a quarter

- Made up of researchers
- They look at
  o Quality measures
  o Recruitment process
  o The balance of the panel
  o Any co-incidental studies – e.g. phone a household and check what they are doing at the time (real time vs claimed).

- There is another informal committee that looks at audience queries, for example if there are fluctuations in the audience they assess whether it is genuine or if there is something wrong.

Contractors involved in providing television audience measurements:
BARB commissions specialist research companies Ipsos MORI, Kantar Media and RSMB to collect data that represent the television viewing behaviour of the UK's 26 million TV households.

1. RSMB:
- Panel homes are drawn from a household sample that is designed by RSMB and is representative of all television households across the UK. They are involved in TV audience measurement design, operation and quality control.
- The current universe is confined to TV households (which are 96% of the total), but they are looking to extend this to include non-TV households with broadband (which would add another 2%).
- They are responsible for panel structure design and control, panel balance and recruitment requirement assessment, quality control reporting and the creation and implementation of calculation procedures.
- They select the homes to be recruited and do all population estimates.
- The selection of homes is done on a probability basis designed to keep the profile of the panel well-balanced; so it is not purely random, some groups have a higher chance of being selected than others.
- The key demographics that drive this may change over time, but currently include lifestage, social grade, and access to pay TV platforms; ethnic background is also important.
- (They are used by RAJAR and NRS as well for similar services)

2. Ipsos Mori:
- Conducts the BARB establishment survey on a continuous basis to measure changes in UK household characteristics and profile changes.
- The establishment survey provides population estimates and is also the main source of homes for recruitment to the panel.

3. Kantar (contracted until 2016)
- The panel homes are recruited by Kantar Media, drawn from a representative sample provided by the establishment survey.
- Running panel and reporting of TV viewing data.
- When BARB changed from AGB Nielsen to Kantar they ran a parallel panel for a period.

This consolidated information is the BARB gold standard on which the UK broadcasting and advertising industries rely for all reporting and trading.

Clear Cast:

- While Clear Cast is not a contractor they are the company that co-ordinates the flighting codes – they play a copy clearance role with agencies.
- This company was set up by the main commercial channels.
- They co-ordinate the naming conventions for ads.

Research and methodologies

1. ESTABLISHMENT SURVEY:

- Conducted on an ongoing basis.
- Owned and run by BARB, not for use by other media.
- The survey is conducted by Ipsos Moris.
- The survey is used as a source of census information on demographics, TV and to monitor changes in media equipment ownership and media usage.
- The objective is keep track of changes in household characteristics and profiles.
- Population figures are derived from this survey and are provided to RSMB to update monthly.
- 4,500 households are interviewed per month on a continual basis and reported on quarterly – 53,000 households annually.

Relationship to the TV Panel

- The panel is adjusted and balanced according to any changes in the establishment survey on a quarterly basis.
- Calculating of universes is done 3 months ahead.
- The panel is selected randomly from the establishment survey respondents. RSMB provides pre-selected addresses that have to be visited – there is not much substitution.
- **Methodology:** face-to-face interviewing.

2. THE TV PANEL

- The peoplemeter panel represents 26 million households in UK (excluding non-TV households).
- The sample consists of approximately 5,100 households reporting daily (5,800 gross sample).
- These homes provide an average of 11,300 individuals reporting daily and the panel reports viewing on around 275 channels. Panellist age starts at 4.
- Not all channels are reported on individually, only those that the various broadcasters request with the rest being grouped as 'other'.
- The panel is built up by area. The UK is divided into 13 areas.
- Households are randomly selected from the establishment survey and are representative of the population.
- Each TV set in home is monitored as well as PVRs, DVDRs and VCRs as well as standard set-top boxes.
- Data is released at 9:30am as overnight viewing figures.
- Eight days later, consolidated audience figures are released incorporating any timeshift viewing from the previous seven days.

Auditing/Monitoring:

- RSMB has a quality control system that flags poor compliance.
- 6% of the panel are called weekly for quality control and to assess compliance. The 6% selected are effectively those with the worst symptoms.
- There is regular contact with the panel for quality control.
- Early warning signs are picked up in reports by Kantar and RSMB. New universes are calculated monthly. Kantar reports back on any issues.
- Services levels are clear and must be adhered to by contractors – meet each month.

Panel maintenance and incentives:

- The panel maintenance effectively adjusts the overall balance of the panel.
- Churn rate of the panel is around 15% naturally and 5% forced each month. Over-represented homes are removed and other put on.
- The profile of the panel is available at all times.
- There is no maximum length of time for a panel member to stay on the panel – they can stay as long as they want.
- Panel members are not compensated financially by are offered gift vouchers. The size of the voucher is determined by the size of the household - £260 for large homes and £120 for smaller homes.
- Members also receive a regular newsletter and have the opportunity to win prizes through draws and/or competitions.
- It is a constant challenge to keep the panel balanced.
- Demographic priorities are decided on – top 3:
1. Access to pay tv (60%) and then 40% the rest

Lifestage (age, children, employment)

Social grade (occupation of chief household earner – blue or white collar)

2. Gender

   Age

3. Ethnicity (which do you consider yourself?)

Validation and weighting:

- RIM weighting is used
  - o RSMB provides the statistical inputs – standard demographics and equipment.
  - o They centrally review the sample and suggest relevant demographics.
  - o They identify the most important elements to be included in the weights.
- There are no disproportionate boosted samples.

Strategy and Innovation

Their mission statement:

"To deliver the bigger picture of viewing and therefore keep the measurement of television together. This means that BARB is seeking to report a comprehensive and cohesive cross-platform picture of television viewing via an industry-relevant, objective, quality assured and dependable Gold Standard Television Audience Measurement Service for the UK. This must be sufficiently progressive to reflect the developing consumption

environment"

Their goal:

"To maximize reporting from the BARB panel and to enable links between panel output and other data sources"

- The need has been identified to move BARB data to become more of a hybrid model.

Strategy

- Big thrust strategy is moving forward to a hybrid survey and defining standards towards which it can be used.

- They see the meter panel as the gold standard hub for television audience measurement but that it will be imperative over time to bolt on and fuse other data sources, subject to the sanction of the BARB stakeholders.

- As an intermediate measure they are looking to report site specific data from web players, e.g. SKO.

- Broadcast viewing stats and average programme audience on devices – then make them marriageable.

3 strategic development priorities:

1. Going beyond the television screen

- Last year BARB established a programme of tracking viewing through desktops and laptops using a web-TV meter that has been developed by Kantar Media Audiences. Installing these meters on computers in their core panel homes will deliver new insight into how viewing is taking place across different screens in the home.

- Following an extensive programme of work from proof of concept onwards, BARB is committed to rolling the web-TV meters out to 600 of its panel homes. As the rollout of the technology continues, the industry is determining reporting protocols in advance of the results being published.

- Alongside this established development, BARB is actively considering ways in which this capability can be extended to include viewing through tablets and smartphones.

Web measurement

- Kantar have developed a software meter to measure viewing on a PC/laptop based on audio matching – does not need tags.

- This is being tested on 10% of the panel.

- No reporting yet on this data.

- At this stage audio cannot be measured on tablets.

- Kantar is investing in research and development and have developed a prototype that is able to measure tablets but will need tagging (which is a better method). Tablets are the main focus going forward as growth is coming from these users.

- Once tablets are working and viable then they will look at mobile phones.

2. Going beyond seven days:

- For many years, BARB has been a global pioneer in reporting viewing that takes place after the original time of transmission. Seven day consolidated ratings are seen to be the gold standard definition of audience levels to programmes and commercials.

- BARB is now in the final stages of determining how they can report on viewing that takes place more than seven days after the original transmission. Proof of concept and pilot work has been completed to the satisfaction of BARB and their underwriters. The focus is now on establishing how the reports can be produced most effectively within the context of established data delivery timetables.

Time shift viewing

- Looking to expand the time shift window – the tail of time shift viewing is longer so there is a need to look beyond the 7 days currently being reported.

- Looking at 28 day windows as a separate measure and not part of the currency.

3. Working with other data sources:

- Many of the new forms of television are characterised by their use of internet protocols. While this form of distribution may represent a relatively small proportion of television viewing now, they have recognised the changes in data delivery speeds through both broadband and mobile networks. This is likely to make these types of viewing experience more attractive and more common.

- The opportunity this provides to BARB lies in the metadata that can be embedded in the programme and advertising content delivered through this platform. Collection of this information will not reveal who is watching, but it will accurately identify the number and duration of viewing sessions.

Innovation and future focus

- The first major look beyond the current BARB panel is the potential merging Skyview data.

- While meter data is still seen as a reasonably cost-effective option and are unlikely to be replaced for television audience measurement, the data can be integrated with other data.

Skyview Data

- Kantar's has developed a return-path operation on the Skyview panel on behalf of BSkyB.

- This panel is around 40,000 recruited homes but may well be increased further.

- The motivation to integrate Skyview data with BARB data comes as a result of the fact that a full 40% of commercial impacts on the Sky platform deliver zero ratings as a result of the size of the BARB panel.

- The most recent development is that BARB is now in the process of formally investigating a long term feasibility study in conjunction with Sky.

- The Skyview data is not seen as competitive with BARB.

- Return path data could be attractive help create bigger and more stable samples.

- This is still at an exploratory stage.

- They are going through a discovery process and have commissioned some work from two of their contractors to help them assess the benefits and drawbacks of making use of a sample of STB data.

- After this process they will make a recommendation to BARB's underwriters, for discussion at CEC, where next

steps (if there are any) would be agreed.

- At this stage it is likely that they would consult more widely across the industry as to any proposed course of action.

Kuper
Research

PRINT

Company: **National Onderzoek Multimedia (NOM)**

Country: The Netherlands

Person: Irena Petric – Director

Function: Readership measurement

Administration

Stakeholders:
- NOM is organised as a JIC, consisting of four participant organisaitons.
- Stakeholders include:
  - o Cebuco   the marketing platform of NDP news media
  - o GPT   group audience magazines
  - o BVA   the association of advertisers
  - o PMA   the association of media buying agencies

Technical/Research Committee (8 people):
- Made up primarily of researchers and some non-research people
- 2 representatives per stakeholder group

NOM staff (4 people – all part time):
- 1 director (Irena)
- 1 office manager
- 2 media researchers/methodologists
- NOM controls the process with the researchers.

Funding:
- Their budget is divided into two parts:
  - o research costs (approximately 88% of the total costs)
  - o office costs (12%).
- Office costs are divided by the 4 participants of NOM (newspapers, magazines, advertisers, agencies) evenly, each party pays 25%.
- Research costs are divided as follows:
  - o Costs for the readership survey and the adjacent projects are paid for by newspapers and magazines (50%:50%).
  - o Target Group Survey (single source with the readership survey) is paid for by newspapers, magazines and agencies (33% each).
  - o If you look at the total research costs the split is: media 94%, agencies 6%.
- Whenever there is a new project the parties decide how the funding will be divided – mostly it is paid for by media parties, but sometimes agencies and even advertisers participate in funding. One example of this is the media time budget survey where the agencies and advertisers share in funding.
- Innovation and validation budges make up ±5% of the budget depending on what's happening.

Contractors involved in providing print audience measurements:

1. Intomart GfK
- Responsible for the NOM readership survey and the consumer survey.

2. TNS Nipo:
- Responsible for the establishment survey – The Media Standard Survey (MSS).
- This is in collaboration with all media in The Netherlands.

Auditing/Monitoring:
- Always do an international audit before making changes.
- Each week they get sample reports from the suppliers and do many checks and balances.

Research and methodologies

The Dutch research community, including print have an ethos of change – they are not afraid to experiment and easily embrace change once all the tests have been carried out.

In recent times there have been major changes to the research methodology in terms of both interviewing/sampling and the AIR reading measurement.

NOM produces 2 main surveys:

1. The NOM Print Monitor (readership survey)
2. The Nom Target Monitor (single source consumer survey)
- These 2 surveys are combined in the NOM Print and Target Monitor which includes readership figures, socio-demographic and consumer characteristics of the respondents.
- This survey is published twice a year with a rolling sample.

3. The Internet audience survey
- Together with STIR (the online JIC), NOM publishes internet audience measurements.
- This combines (fuses) print/internet audience figures.
- This started in 2009 and in April 2011 the combined figures were published for the third time.

4. Establishment Survey [MSS]:
- As per information for SKO.
- NOM also participates in this survey

Methodological changes and innovations
NOM PRINT MONITOR (NPM)
Some History:
- In 2001 they changed their interviewing method from telephone interviewing to an online access panel.
- They changed suppliers to TNS.
- They have been doing this for 5 years and did experience many initial bugs.
- In 2006 there were problems with the panel itself whereby non-internet respondents had to be interviewed face-to-

face.

- This resulted in the need for a hybrid methodology – CAWI (computer aided web interviewing) and face-to-face.
- At present though internet penetration is growing and is currently at ±90% in home.
- At this point they also introduced the Specific Issue Readership.
- Because of the problems with the data, the initial 2001 results were not released to the market.
- They conducted an international audit of the data and identified improvement points.
- Changed supplier to GfK.
- In 2006 they released the new figures.
    - o They explained very carefully to the stakeholders in advance
    - o Explained why they chose a new method
    - o Demonstrated the advantages of the new method, for example it shows how readership grows over time for magazines (not relevant for daily newspapers).

Specific Issue Readership:
- This methodology shows the last 6 covers of a publication for magazines.
- Publishers are responsible for uploading the covers (but NOM checks).
- For newspapers they still show the mastheads. They only have daily newspapers.
- This allows for measuring each issues readership rather than an average of readership over 6 issues.

The Nom Print Monitor
- Sample size is 22,000 people, 13 years old and older representing 14m Dutch people.
- Annually approximately 200 newspapers and magazines are measured.
- Readership is measured with the Specific Issue Readership measurement for AIR and not the recency method.
- The survey also measures usage of other media for inter-media comparisons.
- They ensure that the print question excludes digital reading.
- Only show newspaper relevant to the area of the respondent.

New sampling methodology/framework:
- A mixed mode approach is used.
- Data is collected in both a random probability sample and a sample drawn from an access panel.
- This combines the quality of random probability samples and the cost-effectiveness of online access panels.
- The access panel sample supplements the sample that is randomly selected.
- Validation of the use of an access panel as a sampling source in 2006 showed a very small effect on the readership levels measured.
- Random probability sample is recruited from the Dutch Postal Addresses Files and the access panel from the Intomart GfK online access panel (a database of approximately 130,000 people)
- The Hybrid Method:
a) Less than half the sample is a random probability sample using the postal addresses.

    Prospective respondents are sent letters asking them to participate either on their own or an interviewer will be sent.

    Telephone checks are undertaken for quality control.
b) The rest of the sample is drawn from an access panel of ±130,000 people who are all internet users and the sample is selected by Intomart GfK according to a quota.

    They are recruited by sex and age – a quota sample to boost what they have achieved in the random sample.

    The results are weighted by internet usage, e.g. high, medium, low.

Interviewing methods and the questionnaire
- Randomly selected respondents have the option to complete the questionnaire electronically (self-completion) or by face-to-face methods.
- They are in field all the time.
- The readership filter is based on past 12 months.
- Media are groups by genres with 3-8 titles on a screen.
- Genres and titles are randomised.
- Questions include:
    - o Of the 6 covers shown - read or paged through each cover – yes/no/don't know; origin of copy; how long did you read the last issue read
    - o How is the publication usually obtained – subs, reading circle, bought copy, and so on.
    - o For newspapers they are asked what kind of subscription they have, e.g. paper on weekdays and digital on weekend.
    - o Do they give to someone else regularly to read
    - o Quality of reading – read everything, almost everything, and so on
    - o Time spent reading
    - o Other media – channels never, sometimes, often
- Mastheads are used for newspapers and which issue read in past week – Monday, Tuesday, etc.
- They tested whether showing the front pages of newspapers was better for dailies and have continued using mastheads.

NOM TARGET MONITOR
- NOM have their own single source consumer survey (they do not use TGI).
- Half of the NPM respondents are questioned.

- Information on leisure activities, interests and activities, use of products and brands in the area of cosmetics, food, equipment and finances, car ownership, store visits and values.
- The information collected is then ascribed/imputed with the data from the NPM.
- They use ascription not multi basing.
- One big file is then released with approximately 22,000 respondents with both media and consumer behaviour.

NOM/STIR Linked File (internet reading)
- Through a merger, usage of internet sites is included in the NPDM from STIR.
- In this way, the combined consumption of print and internet reading is available.
- The reading of websites is measured by the internet JIC, STIR.
- They use a panel which includes non-internet households.
- Publishers sit on both the STIR and NOM JICs.
- Mobile, eReaders and Apps are not currently being measured.
- They believe that the ideal measurement must be passive for these platforms.
- The STIR and NOM data is fused and released. There have been 4 releases so far.
- GfK manages the panel. comScore is too large to manage the sampling.

- In the interim, NOM are going to measure digital platforms themselves from January 2014 with a 6-month test. This is to obtain a single source of readership within their own survey – they will do this by adding questions at the end of the current survey.
- It therefore won't measure actual visits to sites but rather recall.
- The filter question will be as follows:
  o Do you ever read newspapers on digital devices like, mobile, eReader, etc?
  If yes they will be asked questions per title.
  o What was read – a digital replica, a website, etc..?
  o What device was it read on?
  o Calculate probabilities on a frequency bais.

Strategy and Innovation

Special project:
- A project looking at measuring advertising reach, not medium specific at the request of the agencies.
- In 2012 and 2013 they conducted a project in which they constructed prediction models for advertising reach for newspapers and magazines.
- This was done in a separate survey – they measured advertising reach (as a dependent variable) and many independent variables (characteristics of respondents, titles, ad characteristics).
- On the basis of the results of this survey they constructed two econometric models that can predict advertising reach, one for newspapers and one form magazines.
- As an example, the variables that can predict advertising

reach are: the amount read in a newspaper / magazine, age, gender, position of the ad in the newspaper / magazine, size of the ad etc.
- At the moment they are thinking about how to implement these two models into media planning for print.
- The models can predict advertising reach (by the way, the definition of advertising reach is: seen an advertising page) for every respondent and every publication.

Future plans:
- Looking to do a 6-12 years old survey

Company:	National Readership Survey (NRS)
Country:	United Kingdom
People:	Mike Ironside (CEO) and Katherine Page (Technical Consultant)
Function:	Readership measurement

Administration

Stakeholders:
- NRS is governed and funded by 3 major stakeholders:
  - o Institute of Practitioners in Advertising (IPA)
  - o Newspaper Publishers Association (NPA)
  - o Periodical Publishers Association (PPA)

The Board (6 members):
- 3 voting members representing the funding stakeholders.
- 3 non-voting members – the Chairman, CEO and a representative from ISBA (Incorporated Society of British Advertisers).
- The board meets 6 times a year.

Technical Committee (9 people):
- Responsible for maintaining and developing the technical standards of the survey.
- 3 representatives from each stakeholder group – mainly researchers.
- There is no resident statistician.
- The technical process must be robust, but has to be considered within a commercial context.

NRS User Advisory Panel (UAP):
- Meets quarterly to explore and generate new ideas and to ensure that the NRS delivers what is required by users in the media planning and buying industry.
- These are in the form of focus groups with publishers and advertisers.

NRS staff (8 people):
- 3 client service people
  - o They are continually out at clients presenting data and doing training.
  - o The training is approved and accredited.
  - o They offer beginners, intermediate and advanced training.
  - o They tailor make presentations for clients.
  - o This training also puts research at the forefront and counteracts ABC's efforts.
- 1 research manager who does quality control.
- 1 admin – office manager and accounts.
- 1 (Katherine Page) – part time technical consultant
- Mike Ironside - CEO
- Simon Marquis - non-executive chairman who comes in 2 days a month and is remunerated.

Funding:
- Currently the development of PADD has taken up the whole of the development budget.
- Everything they do must consider commercial realities.
- 44% of revenue from newspapers, 44% by magazines and 12% by agencies.
- The NRS collects 3 'cheques' per month from the relevant groups.

Contractor involved in providing print audience measure-ments:
Ipsos Mori
- Responsible for fieldwork, data processing and data publication.
- Ipsos supplies weighting and sampling frameworks and the NRS then decides on these.
- They have a partnership with Ipsos rather than that of simply a provider.
- Ipsos runs the helpdesk for NRS as part of their contract. This enabled the NRS to cut back on staff and focus on their core function.

Auditing/Monitoring:
- They have many technical safeguards in place.
- Annually they receive a quality control report – service level reporting.
- They have a service meeting every quarter.
- There are also monthly liaison meetings with Ipsos to be updated on what's happening and to pick up those things that fall through the cracks. This stops problems accumulating.
- They use a carrot/stick approach.

Research and methodologies

Readership survey
- Sample consists of 36,000 interviews annually with adults 15+.
- A continuous survey, 12 months a year, 7 days a week.
- A random sample of randomly selected addresses and randomly selected respondents.
- Interviews are conducted in respondent's own home face-to-face.
- Double screen CAPI is used.
- They have looked at an internet panel and have ruled it out because of the bias inherent in such panels and the lack of representivity.
- The interview covers media consumption, demographics and lifestyle.
- The average interview length is 27 minutes (and they are striving to get it shorter!).
- The NRS interview specifically asks respondents to exclude content viewed or consumed online to ensure measurement of solely traditional print media.
- However, a number of initiatives have been explored to probe online readership.
- Note: they only measure national newspapers as part of the NRS survey.

Measurements

- AIR = read in the issue period and must have been read or looked at for at least 2 minutes.
- Engagement questions include:
  o Frequency of reading (almost always, quite often, only occasionally)
  o Source of copy
  o Time spent reading
- Readership questions groups 6 titles on a screen in black & white.
- Filter on past 12 months.
- Reminded to exclude any reading online.

Other industry bodies in the process:

JICPops

- This is a JIC that controls census and population figures.
- Roger Holland (the chairman and consultant) recognised that everybody was weighting to different population numbers.
- Thus this JIC was set up to control industry approved data based on the census.
- Experien and other companies produce new estimates.
- NRS uses RIM weighting.

JICReg

- This is a JIC that looks after regional newspapers.
- The NRS collects their data for them as part of their survey.
- Special questions for weeklies are included by postal code.
- Readership figures are not released because of small sample sizes but are used rather for modelling.

Measuring digital reading

Initial tests:

- They started looking at this 6-7 years ago.
- They tested a self-completion section at the end of the print questionnaire measuring 60 publishing websites.
- They were not happy with the results and concluded that this cannot be measured by recall because of bias and over-claiming. Particular bias to brands people already know.
- Frequency was an issue and the industry estimates were lower than what was achieved.

Then:

- Fusion was considered.
- 2 companies were considered – Nielsen and comScore
- First decided to use Nielsen because UKOM were using them and also to use RSMB (see BARB) for fusion to figure out how best to get real duplication. Now they are using comScore as is UKOM.
- They went through an intensive development at testing processing.

Now:

- At the moment they are measuring 36 websites – the data is not published but is used for linking - crucial for fusion.
- Filters are past 12 months, recency – the same as traditional print.

Fusing traditional and digital reading:

- The first release of the fused traditional and website traffic data occurred in September 2012.
- While this is in the market it is limited to only bigger sample.
- Nielsen supplied the respondent level data, but they were not moving with new devices
- Moved to comScore (together with RSMB)
- The fusion includes 12 months of NRS data – fuse the last quarter of NRS data with one month of comScore data.
- Tablet data has not materialised yet – waiting for results from comScore.
- The mobile product is GSMA data and they have said they can provide demo data and they are now waiting for sign off from the main providers.
- Web panel is web only but they are developing other devices.
- Web and traditional still in state of flux.

NRS PADD (Print and Digital Data)

- Various possible solutions were assessed, and the favoured approach was a partnership with an established provider of online audience data.
- The advantages of this are that there is no disruption to the NRS print currency, and it avoids the expense (and potential confusion) of creating a new online currency.
- The new dataset is called NRS PADD, which stands for Print and Digital Data. It is a fusion of NRS and comScore data, and provides a single dataset for planning across print and digital platforms.
- 2 broad categories of websites:
  o Publishers' websites – affiliated to NRS print publication and which have a UKOM sample of 40+
  o Non-publisher websites – these are general websites with a UKOM sample size of 750+
- For all websites estimates are provided for monthly, weekly and daily reach.
- To help users make like-for-like comparisons – for example, weekly reach of a website and weekly reach of a print.
- These are not new data, but simply the pre-coded sum of the relevant reading recency codes, e.g. weekly reach is the sum of yesterday and last 7 days recency claims.
- Monthly, weekly and daily pageview data are also available for websites, and in addition, average dwell time data, which can be used in conjunction with the Time Spent Reading data for print.
- The computer bureaus have designed models for mixed-media schedule analysis in PADD. These show the total net reach of combined print and website schedules.
- For print the input is as now: the number of insertions (i.e. the number of issues in which the ad is being placed). For websites, the input is pageviews (up to a maximum of one month), either as a number or as the % of the total available monthly pageviews.

Data Fusion

- A sophisticated technique for integrating two independent databases maintaining the integrity of both
- Respondents from comScore matched with respondents from NRS on basis of shared characteristics which creates a third database – comScore website data are transferred to

NRS respondents

What it provides?
- The unduplicated reach of a print publication and its website.
- Duplication of print titles and websites – which websites do a publication's readers visit, and vice versa.
- Full NRS demographic and classification data for profiling and targeting.

Some issues:
- PADD is currently not completely valuable to users because it is showing very low levels of duplication between traditional and website reading.

The Future
- The ambition for PADD is to include audience data for mobile phones and ultimately tablets.
- However this depends on the availability of respondent-level data from third-party sources, and there is not as yet confirmation of this.
- It is the ambition of NRS PADD to incorporate in time audience data for publishers' mobile and tablet platforms in addition to standard websites. If this is to follow the fusion route, NRS will need respondent-level audience data for mobile and tablet devices the equivalent to the comScore data. This may become available for mobile in the next couple of years, but is still some way off for tablets. NRS may therefore explore possible alternatives, for example by adding questions to the existing survey and calibrating the data to external sources.

UKOM Establishment Survey
- Since 2006, the NRS interview has included the UKOM Establishment Survey. NRS's sample is used by UKOM as the basis for the definitive measure of internet use in the UK.

The Pitch Process:
- Each stakeholder was assigned a technical buddy from their own industry to explain what was contained in the pitch. They were taken through the journey each step of the way and then voted.

Strategy and Innovation

Media Brands:
- Kuper Research broached the subject of looking at measuring media brands in the future.
- NRS are starting to look at this option.
- Due to the fact that there is limited information on devices they may need to add this to the questionnaire to measure which devices the various media brands are being consumed on – are concerned about respondent load.
- The data does not currently include time budget measurements – when people use different devices to read newspapers.
- The brand first approach is being look at but it will disrupt the print estimates considerably.
- It takes a very long time to get consensus from the board to make major changes.

Looking at different methodologies:
- Looking at self-completion online but are not convinced that this is viable.
- They have tried to leave behind a paper self-completion questionnaire if they couldn't reach certain people face-to-face but they couldn't sustain this.

Other:
- Probabilities vs formula are being developed (AIR for number of readers and probabilities for reach & frequency) .

Client service/interaction/communication innovations:
- They have created an app for users to access data. Publishers can show results to advertisers quickly and easily.
- A major revamp of the website:
  o NRS had lost their relationship with their users.
  o Their site was more about technical issues – they have now made is more user friendly and interactive for users.
  o The aim is to demystify the process and the NRS.
- Once a quarter they have a meeting of users (±20 IPA people) to find out what they want, what they are happy with, what problems they have – this helps keep connected to all users. The board observes these meetings.
- The NRS used to be far more research led, but now they want to reconnect with users.
- Part of this is complete transparency with users – warts and all.
- They have a 2 minute video which demystifies the interviewing process. This is accessible on the website. This is for the industry as well as potential respondents. If the respondents understand the process and the usage of the data they are more inclined to agree to participate.

ONLINE

Company:	**UK Online Measurement (UKOM)**
Country:	United Kingdom
People:	James Smythe, General Manager
Function:	Online digital measurement

Administration

Stakeholders:
- UKOM is co-owned by the Internet Advertising Bureau (IAB) and Association of Online Publishers (AOP), but balances this with equal buy-side representation from the IPA and ISBA on its Board to ensure all sides of the industry are equitably represented.
- It is an industry governed multi-platform audience measurement in partnership with comScore.
- UKOM has an independent Chair.

The Board (5 members):
- Chairman from UKOM
- 1 other from UKOM
- 1 from ISBA
- 1 from IPA
- 1 from IAB
- The industry requires a lot of education on the how and why of the data.
- They need to market the idea that digital is complex and interesting.

Technical group (5 people)
- 3 from UKOM
- 1 from IAB
- 1 from AOB

JICS structure/funding at UKOM
- UKOM does not own the data.
- The data and system are all comScore's, but they earn the right to carry the UKOM endorsement through a continuous process of governance and validation.
- UKOM and the improvements are paid for by a levy (clients – agencies and media pay 15% on top of the basic comScore cost for data)
- comScore give £300k of this to UKOM and £100k indirectly to NRS, the rest goes towards the improvements but comScore must meet any shortfall.
- Approval can be withdrawn, or comScore could be required to remedy any problems over a set period of time. If approval is withdrawn, the 15% levy for the period concerned is credited back to the subscriber company.
- The levy pays for UKOM and technological enhancements.

UKOM controls:
- The relative size and shape of rate card tiers (the amount comScore projects that it will earn are agreed with UKOM, who approve a fair and transparent rate card that delivers this).
- Investment in methodological improvements (a budget was set at the start of the contract for improvements, UKOM jointly manages this with comScore).

UKOM staff (5 part time consultants):
- General manager (half his time)
- Chairman
- Commercial director
- Research manager
- Technical manager
- No in house statistician - will liaise with one if and when necessary)

Contractors involved in providing audience measurements:
comScore
- In 2012 UKOM signed a three year agreement with comScore.
- ComScore has overtaken Nielsen as the dominant player in the internet world in the UK. Initially they were using Nielsen but they have moved to comScore – there were issues with Nielsen.
- UKOM has handed much of the technical side of the process to comScore and are focusing more on marketing.

The approval process:
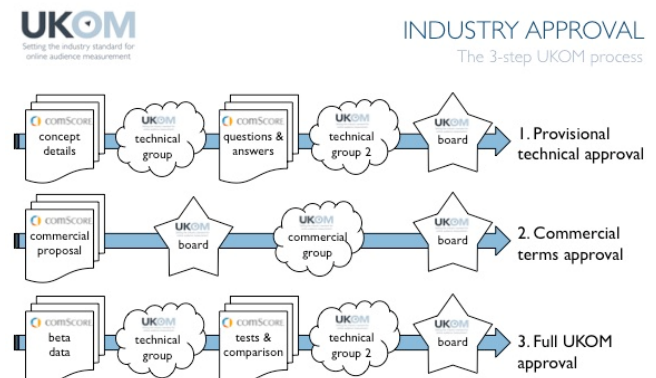
Auditing/Monitoring:
- All data is subject to continuous oversight to ensure the numbers do what they claim and all sides of the industry are represented in UKOM's governance.
- UKOM must give approval on all methodology and data.
- They spend a lot of their time at comScore.
- Weekly contact between the technical people and management.
- The board meets monthly.
- The technical group meets every 6 weeks
- Once a quarter there is a commercial group meeting – agencies and publishers who advise the Board and comScore on commercial terms, and also on which potential new services would be commercially valuable enough to invest in.

Research and methodologies

Online data:

- UKOM was established out of a need for the industry to plan across media and present reach & frequency results – without this investment in brand advertising online will not grow.
- Main objectives:
  - o Digital measurability
  - o Brand scores improvement
- Despite a vast amount of data available online, there are three questions that need answering when planning online ad campaigns:
  - o how many people can an ad campaign reach,
  - o how often,
  - o who are these people demographically?
- This led to the UKOM Audience Planning System (APS)
- In essence UKOM endorses a single source of data as the 'official' measurement of online audience and performance. The need for comparable metrics.
- Their purpose is to provide greater confidence in online media to the media buying fraternity and in the process grow the proportion of "display" advertising online.
- The "display" reference is a throw-back to old print days but basically is meant to refer to any online advertising that excludes a response mechanism.

Technical information:

- The UKOM website data is fused with other media. Every 3 months they create a fixed fusion database with the NRS data. Soon they will be fusing with BARB to make it more open source data.
- comScore figures reflect monthly audiences and NRS derive a weekly figure.

The comScore panel and other technical issues:

- The panel size is around 60,000 people reporting data (with 100,000 on the panel) – there is a high level of wastage.
- Panel members install a virtual meter themselves.
- Incentives are relative to the panellists needs, for example, software downloads or charity or plant a tree and so on.
- UKOM pays £100,000 a year for the enumerator data to the NRS which is used for weighting, sampling and recruiting to ensure representivity. The population reach includes non-digital households.
- The panel recruitment is conducted online and comScore ensures that they stick to the correct demo requirements.
- Key parts:
  - o The panel currently represents PC usage only - which is falling. Over 20% of page views are now on tablets. Also, it can't measure access at work .
  - o Census data.
- Equal weight is placed on panel and census data.
- The methodology used to identify websites is called tagging. Currently 75 of the top 100 publishers are tagged.
- Those that are tagged can be picked up through page views and those that are untagged can be measured by the panel.

UKOM's products:

1. comScore Media Metrix - MMX

The Industry-Approved Online Audience Measurement and Media Planning Solution

- Provides the size of a site's audience, their consumption habits and well as competitive information. It also provides demographic and cross-visitation information.
- MMX leverages comScore's 'Unified Digital Measurement' methodology, to provide full insight into a site's total audience.
- comScore implements tags (which are free and easy to implement) and thereby census data from your sites, apps, video, networks and content is fed into comScore systems to enable Unified Digital Measurement. That means audiences will be fully represented in the numbers used by the industry for online ad campaign planning.
- In the UK, MMX reports on more than 50,000 entities, measuring audience composition and performance within key user segments. The data can be used to plan targeted campaigns based on a variety of demographic, lifestyle, product ownership and behavioural characteristics. These advertiser-friendly definitions allow for easy comparisons of online with other media for brand advertising, using cross-media metrics such as reach, frequency and GRPs.

2. comScore Video Metrix

The Industry-Approved Online Video Measurement and Planning Service

- Online video is now a fully established and distinct entertainment channel in the eyes of consumers, broadcasters and advertisers.
- From advertising and top television programs to viral videos and syndicated traffic, comScore Video Metrix provides objective insights through industry-approved measurement.
- All the major UK broadcasters and YouTube are among those providing server data for Video Metrix. The service also uses the same demographic and behavioural audience definitions as Media Metrix, meaning one can effectively plan online video as part of a cross-media campaign.

3. comScore GSMA Mobile Media Matrix

Next Generation, Census Media Measurement for Mobile

- The rise of smartphones and mobile internet usage creates a need for comprehensive and granular measurement.
- The UKOM-approved Mobile Media Metrics (MMM) meets this need through comScore's partnership with the GSMA and leading UK mobile operators to share the full mobile picture with the industry.
- GSMA Mobile Media Metrics provides a powerful view of the who, what and where of the mobile web to give publishers more comprehensive measurement and advertisers more extensive media reach data.
- This next generation of media measurement combines irreversibly anonymised census-level data from O2, Vodafone and EverythingEverywhere with off network (WIFI) behaviour from tags along with rich demographic data from a representative sample of mobile users.
- The secure, industry-agreed process is regularly audited by the Audit Bureau of Circulations (ABC) UK and provides the only data source for mobile audience web and app measurement accessed using UK mobile networks.

4. comScore Multi-Platform

A holistic and de-duplicated view of audiences and their behaviour across all three main digital platforms: web, video and mobile.

- This gives clarity on the total reach and frequency among a chosen target audience for web, mobile and video combined.

- Using the industry-standard demographic audience definitions combined with behavioural measures, planners and salespeople can create detailed consumer typologies for improved campaign planning, evaluate the impact of cookie deletion on campaign planning, and assess consumers' use of different media devices to better understand the provenance and nature of web traffic.

- Multi-Platform is available as an additional service to subscribers taking any of the core UKOM-approved services (Media Metrix, Video Metrix, and GSMA Mobile Media Metrix)

5. Getting data

- Is available in all the key tools for media planning.

- comScore have their own tool.

- Can be accesses through bureau systems such as, Telmar, IMS, KMR and the like

- The data is also incorporated into other industry surveys such as IPA TouchPoints.

- The NRS PADD project provides a single database for planning across print and digital platforms of NRS publisher brands. (Currently still using UKOM-approved data from 2012 supplied by Nielsen).

Strategy and Innovation

Measurements on mobile:

- Looking to run pop up survey on phones to give permission to provide demo information from the providers – this has not been approved yet.

RADIO

Company:	**Radio Joint Audience Research (RAJAR)**
Country:	United Kingdom
People:	Jerry Hill, CEO
Function:	Radio audience measurement

Administration

Stakeholders:
- RAJAR services the BBC and commercial licensed stations (national, regional and local).
- They service in excess of 300 channels
- RAJAR is jointly owned by the BBC and by the Radio Centre (the trade body representing the vast majority of Commercial Radio stations in the UK).
- RAJAR is set up as a JIC that represents in addition to the BBC and the commercial sector, the interests of the wider advertising community.
- A representative of the IPA and a representative of ISBA (the Incorporated Society of British Advertisers) attend Board meetings and their input is sought on all major issues.

The Board (6 voting members):
- RAJAR non-executive Chairman
- RAJAR CEO
- 3 BBC representatives
- 3 Radio Centre representatives
- 1 IPA representative
- 1 ISBA observer
- Agencies and marketers are present but are non-voters
- All board decisions must be agreed by both the BBC and the RadioCentre
- The function of the board revolves around finances, strategy, policy and governance

Technical management group (TMG) (7 people)
- This group is made up of representatives of the BBC, commercial radio and the advertising community.
- They assess technical issues, look at implications and think of remedies.
- It is made up of research specialists from the major radio groups and the BBC, the RAJAR Technical Director, a consultant for the Radio, the IPA and representatives from the research contractors (IPSOS & RSMB).
- The group meets monthly and its purpose is to review quality control and KPI's (sampling profile, completion rates etc.) as well as discuss issues and technical changes required.
- As part of this they have a Digital Advisory Group (DAG).

Funding
- An annual fee payable in part by the BBC and the balance from the commercial operators via subscription fees payable by the participating stations who subscribe to the service.

RAJAR staff (5 person executive):
- 1 CEO
- 1 research director
- 1 survey manager
- 1 office manager
- 1 communications manager
- They then leverage the resources of the stakeholders. They build communities based on the tasks at hand.

- The role of RAJAR is to align the industry around a measure.
- They are involved in the tender process, quality control of the contract and lead innovation and development to respond to changing needs.
- To create a universal currency that has gone through rigorous tests.
- The speed of change has to be counter balanced by quality of foresight.
- In the UK the speed of change is restricted by the contracts that are in place, plus aligning consensus to the issues and change to be implemented.
- The issue arises when balancing the pressure to change for driven or perceived benefit verses a real fundamental issue with the current research methodology. It is vital to react to the right pressure!
- They are constantly looking at challenges.

Contractors involved in providing audience measurements:

The current research contracts were awarded in 2007 and were extensively reviewed and then extended for 3 years in 2011. Minimum contract periods are 3 years.

1. Ipsos-MORI
- The current RAJAR research contractors for fieldwork and reporting.

2. RSMB
- For weighting and sample design.

Auditing/Monitoring/Quality Control:
- The quarter hour results are mainly used to assess quality control.
- The TMG meets monthly and look at sampling, response rates and so on. The radio body RadioCentre has a representative on the TMG.
- RAJAR actively manages data releases.
- Intense scrutiny prior to any release of data.
- The checks and balances in place will pick up any problems.
- One of the suppliers' KPIs is to make sure that there is a transparent contract and is service based.

Research and methodologies

Current Research

Sample

- Only publish data for those 15+ (unless stated otherwise).
- Data for 10-14 year olds is available on a limited basis. The data is not traded upon but is weighted to represent the child universe of that age group.
- The overall adult sample is about 110,000 per year with each only participating for 1 week.
- The sampling is devised so that each station's sample is representative of the area it covers.
- The smallest sample for a station on RAJAR is 500 adults over 12 months, for stations with a TSA (Total Survey Area) under 300,000.
- The National stations report on a quarterly sample of approximately 26,000 adults.
- Weighting is conducted by TSA from the census.
- The TSA is the 'geography' defined by contiguous post codes that the station wishes to measure. Invariably it will reflect the area where listening share is deemed to be highest. The sampling is representative of the population profile of the TSA, drawing from the Census data that feeds each postcode.

The interviewing process
- Participants in the survey are asked to complete a listening diary for one week. They are not asked to complete the task retrospectively (i.e. for the week before placement) – instead they are asked to start recording their listening as it happens for the week ahead.
- The recruiting part of the process is done face-to-face.
- Diary placement is continuous throughout 50 weeks of the year, excluding the Christmas and New Year holiday period.
- Generally speaking, only 1 respondent is recruited per household. If there is a youth (15-24) then there will 2 respondents.
- If a youth is present one will be recruited in addition to the adult. They do 'snowball' via asking the youth for friends of similar age in the locality.
- They do have additional boost points where they have assignments totally dedicated to getting 15-24 yr. olds. They find that this improves the representation v flooding.
- Quotas are set to ensure the best possible demographic representation of the area.

The listenership questions
- Once an individual has agreed to take part, the interviewer asks a series of questions related to the respondent's demographic details, household tenure, number of radio sets, access to digital platforms (TV, internet, DAB) etc.
- Listening x station x platform is measured.
- The respondent is then asked to keep a listening diary for one week, detailing for each quarter hour, which station they listened to, where, and on which platform. Only live listening is measured.
- The listening diary is recorded in online and paper form depending on what the respondent chooses.
- This choice is offered at the end of the interview questions determining interest in participating.
- The diary also comprises a self-completion questionnaire which covers media consumption including television viewing, newspaper readership, listening to podcasts and via mobile phone etc.

- Results for each station are published on their TSA every quarter, with a sample based on the latest 3, 6 or 12 months of data depending on the size of the station's TSA.

Developments and Innovations

Note: the market is not necessarily asking for more data – they can be overwhelmed by volume and don't want it complicated – but this may change as agencies become more technologically sophisticated.

Alternative methodologies
- Outside of the UK, the predominant radio measurement methodologies are either a similar diary-based system, or using a random telephone day-after-recall (i.e. "what did you listen to yesterday?") approach.
- In addition to these methods, electronic measurement via a personal measurement device has been used in some countries, predominately the major US markets, Switzerland and Iceland. EM has also been introduced in a small number of other countries, often in parallel with the legacy methodology, e.g. in Scandinavia and Belgium.

Electronic Measurement (EM)
- Five years ago, RAJAR completed a major review of the viability (technical and economic) of a variety of electronic

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measurement techniques, which included the world's first multiple-meter trial, and concluded that the unique nature of the UK radio landscape did not lend itself to the then-available EM solutions for two main reasons.

- Firstly, they identified a compliance issue, notably around peak-time, and secondly, in the UK there is a requirement to measure the specific platform (AM/FM, DAB, etc), which some EM devices were unable to do.
- In addition, the cost of EM is high, complicated by the UK's unique market structure of 300 stations and over 500 geographic segments that need measuring.

Smartphone mobile metering

- RAJAR continued to monitor international developments with EM, and welcomed the news that IPSOS Mori had taken on one of the major challenges of conventional EM, namely that people are unwilling to carry a device with them throughout the day and night.
- In response to this, IPSOS has developed a smartphone measurement software system called MediaCell that runs on the phone as an application, picking up encoded radio output (the stations broadcast inaudible codes) and sending back the data via the cellular network.

Comments on some of these measurements as alternatives to diaries:

- A diary is completely different to a PPM (Personal People Meter) and streaming (the direct server log data captured by the station that counts IP device based activity – online listening).
- A diary is asking people to take note. Respondents are more engaged.
- A PPM is picking up exposure not necessarily listening.
- Streaming is just running – don't know who is listening, the unique listening, devices, and so on.

The lead up to the MediaCell Panel

- The question asked was "what type of research could we have that allows the radio medium to be more competitive in the digital environment?"
  o They revisited electronic measurements (which they tested extensively in 2001).
  o The advantage of MediaCell is that it is measured through a cell phone and not a separate device.
- Ipsos ran a panel at their expense in which they:
  o Put encoders in stations
  o Recruited a panel of 300 for a year
  o They incentivised with a phone for the period
  o There was high compliance

- Electronic measurement is only possible if the device can recognise and attribute the 'audio' that it is measuring.
- There are two techniques; audio matching and encoding.
- IPSOS use encoding which essentially is placing an inaudible identification code into the broadcast stream via an encoder (electronic box) fitted at the station.
- The measurement device (MediaCell smartphone) then decodes the encoded signal when it tracks it to produce the data.

MediaCell London Panel

- Throughout 2012, RAJAR & IPSOS ran a limited London-based test in which 13 major radio stations in the area broadcast encoded signals, and 250 adults were recruited to participate with app-enabled phones.
- The purpose of the test was to understand recruitment and incentive thresholds as well as user compliance behaviour (e.g. was it switched on, carried, sending back data, etc?). It should be noted that the panel was not designed to produce survey quality audience stats.

- Panel recruitment and turnover was extremely positive, and the pattern of usage recorded through the day was consistent with known behavioural patterns.
- There are still uncertainties that remain about electronic measurements, but the results were sufficiently encouraging for RAJAR to commit to further investigation.

- In 2013, RAJAR and IPSOS will be investing in the panel to learn more about the capabilities of the device and a possible future role for EM in the UK. While there are questions around EM being an alternative measurement solution, RAJAR is keen to determine its potential to complement the existing survey through providing deeper audience flow insights for programmers, for example, in track switching behaviour and station loyalty over time. RAJAR will determine the long term value and viability of the MediaCell panel towards the end of 2013.

Online Diaries

- RAJAR has invested in an on-going programme of development and innovation geared to maximising accuracy, accountability and quality of data.
- The digitisation of the medium has created new demands, and in response, the survey has been adapted to measure all individual listening platforms – online/apps, DTV set top receivers, and DAB Digital Radio as well as traditional analogue radio (AM/FM).
- The recent introduction of an online diary has significantly improved platform listening attribution.

- In the summer of 2011, with broadband access exceeding 70% of UK homes, the original paper diary format was extended online to enhance respondent engagement and provide a genuine choice in how to participate.
- At the same time, the initial interview and sign-up process was migrated onto a computer assisted personal interview (CAPI) platform, leading to the improved capture of respondents' contact details to facilitate fast access to the online diary.
- Additionally, a monitoring interface has been introduced, which allows real time access to respondents' survey compliance, helping to improve completion levels.
- The proportion of online diaries has been gradually scaled up and by Spring 2013, around half of all respondents will participate online.

- There will be more innovation on this front – half are now online and a completion rate of 75%.
- A lesson learnt – when interviewers don't go back to pick up something from the respondents the psyche of the contract is different. In light of this they do arrange to pick up something from the research to make this contract stronger for

those who choose to complete the questionnaire online.

- A major advantage is that the recruiter has an electronic dashboard and can check if the diary is being completed – if not they can follow up.
- They are currently developing a version that works on a mobile phone or tablet.

Audio Diary – radio in an audio world

- With the introduction of the online diary, RAJAR now has the ability to re-contact previous survey participants in a cost-effective way. As new listening devices and capabilities emerge, conventional patterns of media consumption are evolving and progressing.
- To meet this challenge, RAJAR is developing a bi-annual audio diary to provide a new layer of time-centric insight into emerging listening behaviour, such as podcasting, listen-again, mobile and wider audio services.
- The benchmark Audio Diary study has already been completed and the first results showing survey-on-survey trends will be made available to subscribers in Summer 2013.
- Currently they are making adjustments to weight back to the population which is taking some time. They have yet to agree on what data they will publish so it will be some time before this is clear.

Comments on measuring non-live listening:

- Currently RAJAR only measures live listening (not listening again).
- Non-live listening is tiny in the market.
- This type of listening, podcasts and listening again, are measured on a separate survey – this is very broad but is being extended in terms of behaviour, frequency and time spent listening.
- RAJAR is keeping an eye on this and tracking to see when they think is something that should be measured.
- Will streaming data need direct measurement in the future? RAJAR has set up an expert group to look at this but they will lead strategic rationale.
- The expert group (DAG – Digital Advisory Group) is set up to monitor all aspects of the emerging digital landscape and how this might impact measurement.
- They have already looked at streaming data to understand the characteristic and issues that come from this data source.
- They are not intending to do much more with this data as it only represents a small proportion of total radio listening, it is not in cars and is very unrepresentative of all listening.
- Their current diary measures online listening already, so they do not need to duplicate.

Comments on various methodologies:

- Different methods produce different numbers
- A summary of what they each measure:
  o Recall-based methods record the most memorable recent listening that people can remember.
  o Audiometers record what people are exposed to regardless of whether they notice it or not.
  o Computers count computer connections, not listening.
- Set against these alternatives, RAJAR believes that the diary system, with its simple concept of "precall" comes closest to capturing which radio stations people are actually "listen-ing" to.

- It's also inclusive and affordable, and it copes better than any other methodology with the highly common frailty that plagues all research methods involving human beings – forgetfulness!
- It is inevitable that the UK will eventually move to or incorporate some form of electronic measurement, but that won't happen until we find a system that is at least as inclusive, and as affordable, and which represents an improvement on what we already have.
- In the meantime, we will continue to develop and adapt our human-friendly diary.

Client/marketing innovations

- They have a vibrant interactive website which includes an app for looking at data.
- They have a video which explains how the online questionnaire works.

OUTDOOR

Company:	**Route – Outdoor Media Analytics**
Country:	United Kingdom
People:	James Whitmore, Managing Director
Function:	Radio audience measurement

Administration

Route was launched in February 2013. It is the successor to Postar, the previous currency that had been set up in 1996.

Ownership and funding:
- The trade associations for the buyers and sellers of the medium underwrite Route jointly.
- The IPAO represents the interests of the specialist poster agencies (or planners & buyers) working on behalf of advertisers.
- The Outdoor Media Centre represents the interests of the media owners (or sellers).
- The underwriting agencies are Kinetic Worldwide, Mediacom Outdoor, Posterscope and Rapport Worldwide.
- The media owner guarantors are CBS Outdoor, Clear Channel Outdoor, JCDecaux and Primesight.
- Route receives additional income from subscriptions to the service.
- Route is a non-profit making organisation, run on commercial principles.
- IPA has a 50% share and the Outdoor Media Centre the other 50%.
- Agencies contribute anything from 0% to 16/17% and the media owners pay the rest. Currently the ratio is 15:85%.

Commitment
- Media owners are tied into long term binding contracts.
- The funding agreement ties them into spending the money they agree to.
- There are 8 underwriters:
  o 4 of the biggest agencies
  o 4 of the biggest media owners
- Contracts run for 6 years.

Governance
- As a Joint Industry Committee (JIC), Route is independent of any special interests.
- Its board of directors has an equal representation from the buyers and sellers of the medium.
- A methodology committee considers the approach to the research and its future direction.

The Board (±10 people):
- The Board of Directors comprises of the heads of the leading IPA Outdoor and Outdoor Media Centre companies that underwrite Route.
- Each organisation has one vote, thus both bodies must be in agreement for action to be taken.
- Representatives of ISBA and the IPA are also present but do not vote.
- The board convenes quarterly to determine strategy and to govern finances

The technical committee (10 people):
- Meet once a month
- Not necessarily qualified enough from a research perspective
- The participants are elected

The methodology committee
- The Methodology Committee considers the overall scope and direction of the research as well as all other technical matters.
- The committee comprises the most senior and experienced research practitioners in the medium.

ROUTE staff (3 people):
- 1 managing director
- 1 operations manager
- 1 information manager

Research partners:
1. Ipsos Media CT
- In 2008 the Route study was commissioned and Ipsos MediaCT was selected as the company to undertake the work.
- For Route they undertake the project from start to finish, overseeing fieldwork and developing bespoke modelling.

2. MGE Data
- Based in Prague, MGE Data are a specialist in geographic information systems and geo-marketing technology and data.
- MGE Data provide MobiTest GPS meters for Route, and contribute to the modelling parts of the Route study.

3. Birkbeck, University of London
- Dr. Paul Barber, Emeritus Reader in Cognitive Psychology at Birkbeck, University of London, spearheaded the eye-tracking work that facilitates Route's visibility study.
- Route has an ongoing relationship with the Department of Psychological Sciences.

Research and methodologies
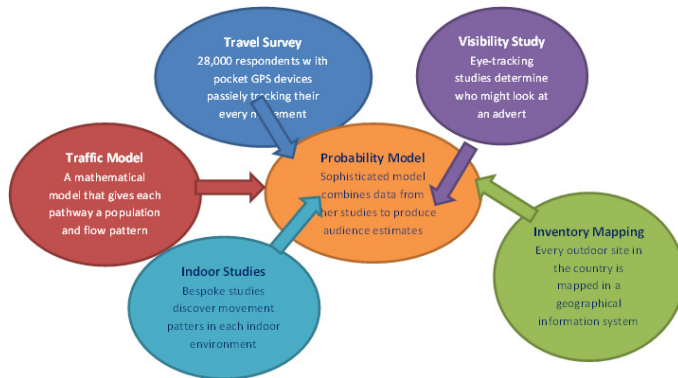
Current Research

- Route has established that a single study will not answer all the questions with regard to outdoor audiences.
- They have found that the answer is to combine a number of studies, each of which is tailored to answer specific challenges of measuring the audience for out-of-home advertising.

1. The Travel Survey

- The largest ever GPS travel survey measures how people move around as they live day-to-day. It also provides the source of detailed demographic and other information about the respondents.
- The GPS device captures passive, second-by-second data.
- Sample 28,300 people.
- The meters allow for return path data so that the data supplier knows which meters are being used properly.
- The respondents carry the meter for 9 days (2 weekends with a week in between)
- The compliance rate is very high – around 7.8 days.
- Sampling of busy commuters is a problem and the recruiting is done in daylight hours.
- All outdoor environments are included (bus, rail, roadside, tube, airports, retail and so on).
- Over 250 questions on lifestyle, media consumption and shopping are included.
- GPS data can be integrated into TGI and TouchPoints.

Overview

- Ipsos MediaCT using GPS devices supplied by MGE Data conducts the travel survey fieldwork.

  So far, 28,299 respondents have participated in the study.

- Each respondent is asked to fill in a questionnaire and to carry a GPS meter for nine days; two weekends and five weekdays. The meter tracks their location, second-by-second, for the entire period.

- The information is collated and plotted onto a framework map of Great Britain.
- The study is continuous, with GPS devices in the field throughout the entire year, save two weeks at Christmas. The "survey year" runs from September to August. A further 5,000 participants are planned for 2013-2014.
- The MobiTest device (supplied by MGE Data) contains an accelerometer and can demonstrate not only location, but also type of movement.

2. A. The Traffic Intensity Model (TIM)

- A Traffic Intensity Model (TIM) determines absolute population numbers and their travel flow. This too gives the framework that maps the entire country, indoors and out.
- Navteq creates the maps for the GPS data to sit on.
- Road links on a map are given a unique code (geographic info – the length and width of the links, bus traffic, single or dual carriage way and so on).
- A link is for example the road from say one T junction to another T junction.
- An average traffic speed is given.
- By placing the sample from the Travel Survey on top they can know the demos, the time of day, speed calculations, time of day by 4 time breaks.
- Buses – the digital version of every route of every bus fits on the traffic intensity model.

B. Count data

- The government does 25,000 counts a year.
- Local authorities also do counts.
- They are now starting to model 3million links.
- Verification with flooded sample counting vehicles and pedestrians.
- GPS = people
- Counts = things, e.g. vehicles
- They then calculate how many people in a vehicle.

Overview

- Ipsos MediaCT and MGE Data have created a digital map of Great Britain.
- The map of the road network emanates from NAVTEQ, the location specialist.
- For interior locations such as tube stations and shopping malls, scale drawings are translated into digital versions that are compatible with the road network.
- Once digitised, each pathway in the country can carry a flow of audience.
- The first step is to identify absolute counts of traffic and pedestrians and to accurately assign them to specific locations.
- The counts are obtained from many sources including the Department for Transport, Transport for London, local authorities, BAA and Network Rail.
- Commercial sources such as PMRS are also employed. In addition, Route commissions its own counts to verify the official data and to add statistics in areas where the official sources might be sparse, e.g. residential roads.
- The task of the Traffic Intensity Model (TIM) is to expand the traffic figures at known locations so that they cover the entire country.
- The extrapolation is based on a flow algorithm that stimulates car and pedestrian traffic with respect to traffic rules,

location infrastructure and other surrounding count stations.

- TIM takes into account the distance from an original measurement and the traffic complexity in between.
- It generates short distance flows so that for each point on a street or inside a transport hub or retail location, it is possible to analyse contributing flows and particular intensities.
- It is able to simulate traffic intensity and generate similar conditions in similar locations.

3. The Eye-tracking Study

- Pioneering eye-tracking studies gauge the likelihood to see the various types of display. The research accounts for scale, orientation and distance. It also calibrates properties such as movement and illumination.

Overview

- Unlike other media, it is not sufficient to say that proximity to the advertising display equates to exposure to it.
- An advertising frame may be within the cone of vision and a respondent may be heading in a favourable direction, yet there may be factors that prevent a frame from being seen.
- These can range from the distance between the respondent and the frame to their respective orientations.
- The speed of travel will also affect the chance of contact.
- The size of the display is important, as is its movement and illumination.
- The aim is to go beyond simply counting those who pass an advertising frame having an opportunity to see it, to determine who might actually look at a particular frame in each given set of circumstances.
- Route continues the pioneering work undertaken by Postar with Dr Paul Barber and Birkbeck College, part of the University of London. A continuous research project examines how people look at particular variations of out-of-home advertising formats in different situations.
- Carefully controlled infra-red eye tracking experiments are conducted where subjects view numerous scenes and different frame types. Respondents are asked to play one of three roles - driver, passenger or pedestrian – without foreknowledge that the study concerns advertising, to replicate actual behaviour out of the home. The study enables us to determine how peoples' eyes move whilst they are travelling.
- The study produces a series of factors by which the gross audience for a particular frame might be adjusted depending on its specific characteristics. A matrix is derived that allows such adjustments to be made for any known set of parameters.
- By applying this information about how people actually view the real world, the audience for each frame may be adjusted to account for its likelihood to be seen.

4. Inventory Mapping System (IMS)

- The Outdoor Media Centre uses its Inventory Mapping System (IMS) to collate detailed characteristics of its members' frame inventory.
- Having worked out who goes where and what they might see, the final element is to introduce the advertising frames, the audience for which is to be measured.
- Updated information is forwarded to Route on a quarterly basis for inclusion in the next round of publication.

- The many inputs form a series of data files.
- Audience measurement is the result of combining the files through the application of a sophisticated reach & frequency algorithm.
- The output of the study is an estimate of the audience to out-of-home advertising campaigns. Route quantifies how many people see a campaign and how often they do so.
- The audience can be broken down into many typologies including age, class, lifestyle, shopping habits and so on.
- To monitor sites they use specified GPS cameras to take pictures of each site – this only has to happen once unless the dimensions of the site are changed.

OUTDOOR INVENTORY

- The media owners are responsible for the provision of accurate information about the location and nature of their stock.
- The process is managed and verified by the Outdoor Media Centre utilising their Inventory Mapping System.

Details supplied include

- GPS location
- Orientation to north
- Size (dimension)
- Type (static, scrolling, digital)
- Illumination (none, front, rear, digital)
- Distance from which the frame may be seen
- Address

- The information is updated continuously and fed to Route on a quarterly basis in time for each publishing date.

- Over and above the regular surveys Route also conducts a variety of bespoke surveys.
  - o Indoor environments – flow studies in interior spaces
  - o Window – Views from windows of buses and trains
  - o Tube car OTS – what do people look at on the train
  - o Illumination – how does this impact
  - o Re-contact studies for airport users
  - o Dynamic images – what does movement do to hit rates?
    - ♦ Digital/scroller, more than 1 ad and so on
    - ♦ In visibility research does movement attract the eye?
    - ♦ If more than 1 ad (face) in a frame then the maths to calculate the visibility is: total visibility = a division of the number of faces in the frame.

Measurements and general

- Do people actually see anything?
  - o What is the Realistic Opportunity to See (ROTS)
  - o The likelihood of seeing
  - o ROTS converts to Likelihood to See (LTS)
  - o An LTS has become the main currency and is fed into the TIM.
- A reach & frequency algorithm is then used (can get access to the 17 pages of algebra if required)
- The sample and counts are updated every year and the inventory every quarter.

How the market operates and uses the data:

- The data is used more for planning than for audience information
- It is used extensively to negotiate deals
- There are outdoor specialists to plan and buy OOH and then sell their services to the agencies.
- Data is not used like it is for TV or radio. Clients want ROI more for the inter-media decisions.
- As econometric models are becoming very popular, OOH can now have data to input.

Software:

- The industry isn't very clear about what they want.
- Telmar has a system but again it is not clear if it is what the industry wants.
- 3 agencies have produced their own systems.

Developments and Innovations

- Currently they are using meters to measure GPS data. The next step would be to use mobile devices, but this is not ready yet. They envisage this happening in 3-4 years' time.
- Using mobile devices could open the way for measuring beyond outdoor, it could extend to TV and radio as well. Could allow for a central data source.

- Whether all elements of this research are deemed absolutely necessary is debatable, but interesting nonetheless. The process may be unnecessarily complex.

Kuper
Research

MULTI-MEDIA

Company:	**The Association of Media Analysis (agma)**
Country:	Germany
People:	Jurgen Wiegand, CEO and Gabriele Ritter, Authorized representative / head of Department print + online
Function:	Print/Radio/Online/Outdoor audience measurement (not TV)

Administration

Organisational structure:

It is a multimedia organisation (similar to SAARF).

Funding comes from the media itself.

There are 2 elements to the organisation:

1. agma (JIC)
- Based on members' fees per year:
  o 98% by media owners
  o 2% advertisers and agencies

2. **Media Micro Census (MMC)**
  o Operates as a (Pty) Ltd (vat issues)
  o Owned by agma
  o Turnover is €12m collected by the media
  o The task of the MMC is the organisational and commercial handling of research contracts in the field of mass communication.

- Only agma members get access to the data.
- They are developing a model whereby non-members can buy the data, but this is not available yet.
- Currently data is sold on an ad hoc basis. If used commercially then there is a cost, but if used for academic reasons they supply data for free.
- Additional income comes from:
  o Providing demographic data – sampling and weighting
  o Media data
  o Charge a licence fee for using their software for interviewing - €250,000.

Stakeholders:

- Members include publishing houses (newspaper as well as magazines), TV, Radio, outdoor, online, advertisers and agencies.
- Represent 240 advertising and media companies.
- During the year there are 4 meetings with ±65 people selected by the constituencies to make interim decisions (a supervisory board). This amounts to 8 people from each group which they recognise is way too big.
- All media are involved in any decisions impacting on reach,

regardless of who is being affected.

- Data is only provided to members through the software providers as per a license agreement with agma.
- This JIC advocates a "culture of consensus". Guarantee for the stability of this type of organisation is the transparency of the whole system.

The Board (8 members):

- 1 for each medium (but they are looking for ways to make it small)

Technical committee:

- 2 representatives from each medium (1 is elected and 1 is decided on by the group).
- Methodological decisions are made by this committee.
- Germany runs a sample census every 2 years. The last full census was 1989.

Funding

- Majority of the funding comes from the media owners.
- There is a separate budget for research and development - ±10-15% (1.5-2m)
- All members meet once a year to vote on budgets.

agma Staff (25 people):

- CEO
- A team focused on magazines, newspapers and online
- A team focused on outdoor, radio and TV
- A statistician/mathematician (a new position)
- Administration and PR staff

Contractors involved in providing audience measurments:

- Number of fieldwork companies:
  o 6 for print
  o 5 for radio
  o 3 for online
  o 3 for outdoor
- agma controls and provides the sampling and then distribute the frameworks to the other companies.
- The sample is drawn by an external provider (not a research institute) according to parameters set by agma.
- They have a tender once a year.
- They feel it is a big strategic mistake to use one fieldwork company.
- There is a lot of co-ordination of suppliers and members and relevant groups.

Auditing/Monitoring/Quality Control:

- agma run internal quality controls – not Nielsen.
- MMC oversees all research:
  o They receive the raw data
  o They use a central data verification company for comparing all fieldwork data.
  o They then combine data from all fieldwork companies.
  o Reporting is done by MMC.

- o Make use of an external expert for sampling (most of them work 90% of their time on MMC).
- o Each fieldwork company goes under intense scrutiny.
- agma defines and institutes what they want and what their expectations are. They provide a booklet on what is expected from their suppliers.
- Once a year they meet with all the research houses for control.
- Any changes are extensively tested.

Research and methodologies

MEDIA ANALYSIS

ONLINE
- Online data is jointly implemented with the company Internet Media Analysis GmbH (IMA) which was founded together with Arbeitgemeinschaft Online Research (AGOF).
- The operational implementation is located at IMA, commissioned by agma bodies.

- The methodological basis for the online survey is a 3-tiered model, consisting of a technical measure of use, an on-site survey, as well as a population telephone survey.
- The data of these three tiers are linked together in a complex multi-stage process.
- This ultimately determines the range and structure data of the participating online offers. The monthly reports of the online data are published approximately seven weeks after the end of a month.

Survey Method
I: The technical measurement
- The first tier contains all requests of unique clients from Germany to the online services of agma members and AGOF licensee (about 850 offers, as of June 2012). These page impressions are recorded by the Technical Measurement and stored on a central server.

- With each call to a supply side through a unique client, a pixel is transmitted to:
- o The unique client accepts cookies from third-party, so an existing cookie (ivwbox.de) can recognize the SZMpixel and sign the Page Impression to the central server of the measuring system. Thus traffic to different landing pages can be assigned to anonymised a unique client.
- o If unique client still has no cookie of the measuring system, an attempt is made to place one. If this attempt is successful, then the measurement can be carried out as previously described.
- o If the unique client does not accept the third-party cookies, the measurement uses a combination of an anonymous IP address and the user agent.

Participating service providers
- Infoline Ltd.
- spring GmbH & Co. KG

II: The on-site survey
- For the second tier randomly selected users of the measured online offerings are asked to participate in an online survey - the so-called "on-site survey". This includes mainly information on socio-demographics and the general use of the Internet (eg, used computers and browsers, locations, etc.).
- A user is asked to give an email address, to which a link to the survey is sent. The follow-up survey will be answered by the user in another one of the browser specified by him.
- The survey aims to associate better individual users (unique users) through this data in the technical measurement collected unique clients. Both databases are merged into one database is only used internally.

Participating service providers
- Infoline Ltd.
- spring GmbH & Co. KG
- Interrogare GmbH

III: The CATI survey
- In order to make reliable statements about the population in the online survey, additional information is needed about people who do not use the internet. These people will fall out of the technical measurement. Therefore a population representative CATI survey makes up the third tier.
- Similar to the on-site survey, the CATI survey measures socio-demographics and internet usage. This data allows for the weighting up of internet users to the general population.

Participating service providers
- BIK ASCHPURWIS + BEHRENS GmbH
- Ebert + Ebert GbR
- Ebert + Grüntjes GbR
- GfK Ad Hoc Services
- GfK Enigma
- PhoneResearch
- TNS Infratest GmbH & Co. KG

Two-stage data processing
- The processing of data occurs in a two-step process.
- The first step: the technical data of the measurement can be linked with those of the on-site survey for the first record.
- In the second step: the data from the telephone survey is completed. The result is representative of the population in the second data set.
- Consult agma for further technical processing.

OUTDOOR
- The "way out" in the population collected in the outdoor survey depicts the "probability of encounter" with a billboard and calculates the performance relevant to planning.
- The mobility data collected is used to determine the performance data of the outdoor sites.
- The relation of the people with the outdoor locations (taking into account the traffic frequencies and Effects parameters).

Survey Method
I: Mobility and respondent data

- The mobility data of the respondents and the outdoor information are collected through the combination of two survey methods.
  - o In a telephone survey (CATI) information collected is representative of the whole of Germany for the mobility of the last day outside the home using card-based special software.
  - o A technical measurement using GPS collects precise mobility data (coordinates per second) for a period of seven days. Here, the subjects are recruited by quota in selected cities.

Participating service providers
- So far the following institutions have participated in the interviews:

GfK Enigma

IFAK GmbH & Co. KG

Institute for Market Research Leipzig

IPSOS Germany GmbH

Marplan Research Society

Market research Media GmbH & Co. KG

TNS GmbH & Co. KG

uniQma GmbH

II: FAW Frequency Atlas (Mobility flows on country wide road network)
- The FAW frequency Atlas provides the average hourly frequency values on road section level differentiated according to motor vehicles, pedestrians and public transport.
- It is modelled on the Fraunhofer IAIS since 2003. Poster and road section frequency measurements, that are carried out by GfK and the Bundesanstalt für Strassenwesen (BASt) at poster sites form the input for the model.
- Using different learning methods of spatial data mining, empirically determined frequency data on individual segments transferred to the complete road network on the basis of community.

III: Media/Advertising data of the FAW
Billboards and effective parameters (k-value)
- The media data are provided by the FAW. The central component of the data is the so-called "k-value".
- The k value is a contact factor, which takes into account the conditions of each individual outdoor location (the so-called ' complexity of environment'), the angle to the ground, the number of other poster sites in the environment and other visibility factors.
- For the k-value, parameters are used as active factors, so that the different media types and their locations can be differentiated and incorporated into the distance calculations.
- The theoretical value of k for best outdoor advertising would be 1.0.

PRINT
- There is a 2-3 month period from end of fieldwork to reporting.
- Report data twice a year.
- Readership surveys are conducted face-to-face.
- Filter question is in the last 2-3 years.

- Group titles by genre with 4 on a screen (touch screen).
- When last read – 12 issues.
- Reading in issue period.
- CAPI software should be easy and usable by respondents alone. Touch screen or a pen.
- No brands or products. The survey is already 43 minutes.
- Other people do brands/products/consumer surveys. Members only can fuse this data with the agma data.
- Daily newspaper use is measured together with the magazines in the media analysis.
- Sample is 39,000 CASI interviews in 2 waves.
- Due to the mostly regional dissemination of newspapers, these are reported in contrast to magaizes on the basis of approximately 140,000 cases.
- The publication takes place in reports and data sets for the "readers per issue".
- The record represents nearly 100 percent of the German newspaper market with approximately 1600 occupation units.

The CASI survey
- Two survey instruments are used in the newspaper interviewing:

  the classic paper questionnaire (paper-pencil) and the computer-assisted interview (CASI - computer assisted self interviewing).
- Since 2012 all interviews are conducted through CASI.
- After a briefing by the interviewer the respondents input their answers via a touch screen on a laptop.
- In addition to methodological and logistical advantages, the CASI method provides inter alia the advantage of a greater standardization of the interviews and a reduction of interviewer effects.

- agma provides the research institutes with software (CASI-Software, CATI-Software) as they have very specific requirements and want the institutes to use the same processes.
- This is free of a licence fee, to the research institutes to run agma research. A licence fees is charged if there is anybody, who wants to use the software for "non-agma research".

The range determination
- agma speaks of the so-called recent reading model (last read). The questions about the use of the media work with reminders for the respondents (aided recall):
- The interview shows respondents title cards with mastheads of newspapers, according to regional distribution.
- The questionnaire comprises about 50 pages and includes questions for awareness and use of magazines, newspapers, titles of the religious press, movies and books.
- In addition, questions are asked about leisure, household facilities and socio-demographic characteristics such as age and education. (Similar for magazines)

Participating service providers
- So far the following institutions have participated in the interviews:

GfK Enigma

IFAK GmbH & Co. KG

IPSOS Germany GmbH

Marplan / USUMA

Market research Media GmbH & Co. KG

TNS GmbH & CO. KG. KG

RADIO

- Day in the life activities
- ¼ hour listening
- Other activities
- All radio stations are included in this representative survey.
- Sample of 65,000
- CATI interviews among the German population aged 10 or over.
- Two survey waves are published during the spring and summer audiences and target group characteristics for about 200 public and private individual broadcasters and combinations.

Participating service providers

- So far the following institutions have participated in the interviews:

GfK Enigma

IFAK GmbH & Co. KG

IPSOS Germany GmbH

Market research Media GmbH & Co. KG

TNS Media Research EMNID

TNS GmbH & Co. KG

INTERMEDIA RESEARCH

- agma does not run or control the TV data, this is done by AGF/GfK, however the data is incorporated into the intermedia data.
- They have their own touchpoints survey for intermedia research
- The currency comes from silo studies and then combined via linking variables.
- The hub survey (2,500 respondents) is done using smart phones provided by agma to a quarter of the sample. Quota sampling is used.
- This measures media habits every hour for 2 weeks.
- If not able to use a smart phone then the respondent is given a paper diary.
- Respondents are given a mobile device with software installed. This cannot be used for telephone calls only the survey.
- However, the hub survey is not sufficient enough and is expensive for intermedia research.
- They are still looking at how to combine online consumption.
- At the end of the interview they ask for the email address.
- If yes, the respondents receive an invitation to a link which leads to an online questionnaire with same questions online.
- The questionnaire has a tag which helps to measure sites.
- These are used as linking variables. The response rate is not huge but they can impute to user universe.

- The data of individual media collected in tranches by agma and the AGF/ GfK TV panel data are brought together in a single file.

- In this file, advertising and promotional contact opportunities for press media (magazines, newspapers and cinema), radio, TV and outdoor are evaluated.
- The Intermedia research enables the comparison of individual different types of media.
- The Intermedia data is created through mergers/fusion.

Developments and Innovations

Fusion:

- Thinking of new ideas for fusion techniques. Finding it difficult to match all the media. They are looking at multibasing.

Company: **WEMF**

Country: **Switzerland**

People: Harald Amschler (Head of Research)

Function: Print, cinema and intemedia audience measurement

Administration

Organisational structure:
- It is a multimedia organisation (similar to SAARF), but not for all media. They also go beyond research and are responsible for ABC and advertising spend.

- WEMF is organized as a corporation that offer:
1. Media consumption research
2. Support authentication
3. Statistics
4. Product Consulting

WEMF is made up of 4 businesses:
- Audience measurement for print, cinema and intermedia
- ABC
- Advertising spend
- Product consulting – skills on how to use the data and products.

Board of Directors
- Jürg Weber, Swiss media Represented Association, President
- Moreneo Cavaliere, representatives VSW, Swiss Association of Advertising Companies, Vice President
- Valérie Boagno, Representative Press Suisse
- Roger Harlacher, Association of Swiss Advertisers'
- Roberto Rhiner, representatives of the Association of Swiss media
- Caroline Thoma, representative of the Association of Swiss media
- Peter Wanner, representatives of the Association of Swiss media

There are separate JICs for the different media.
- Media Pulse: Radio, TV Panel, media watch and time budget online
- (TV: since changing provider, there are no figures because Kantar couldn't produce similar figures)
- Net Metrix: online
- Swiss Poster Research: Outdoor
- WEMF: print, cinema and intermedia research
- The different media are getting together more now because they want to look at intermedia research.

- They are developing a co-operation model.
- The digital joint venture = Media Pulse (45%); WEMF (45%), Online association (10%)
- They are looking to find a new body for intermedia research.

Stakeholders:
- Print, cinema

WEMF Staff (21 people):
- 19 full time
- 1 CEO
- 1 technical manager (Harald)
- Each survey has a project manager
- All employees have degrees.
- The need for statisticians is outsourced.

Contractors involved in providing audience measurements
- Various contractors are used and are responsible for the different media.

Research and methodologies

PRINT
- For readership they use random digit dialling. The sample rights itself on a national sample.
- The process is automated with return path data.
- They can't do face-to-face interviewing because it would be too expensive – mainly because they can't find interviewers (their main problem is over employment). They stopped face-to-face 30 years ago.

Sampling and methodology:
- Start with a short telephone interview to a household and then randomly select a person within the home.
- The system randomly selects who will do a telephone and who will do an online interview.
- If a telephone interview they will set up a date to do the interview. In preparation they will send a brochure with the mastheads.
- Titles are grouped by frequency or genre. The titles are rotated within lists of titles.
- The filter is 6 months reading.
- They are currently using a new methodology – the results will be published for the first time now and they expect a major impact on readership figures.
- When changing methodologies:
  o They tend to keep one methodology consistent for about 10 years.
  o After 10 years they consider changes with the changing circumstances.
  o There is much research and development in between.
  o Stakeholders are informed of the changes throughout the process and the impact on figures is clearly explained so that there are no surprises.

The print research process:

1. A recruitment interview.
2. Half online, half by telephone.
3. The readership question includes readership on paper and added is readership of newspapers digitally. They further ask for the device – mobile, websites, apps, epaper and so on.

- One of the complexities with measuring reading online is that the advertising on a website is different to the advertising say on an epaper version.
- Agencies want advertising OTS of ads and this is not always the same on different devices.
- A further concern is that a reader can't always tell which version they are reading. For example when clicking on an app a user can be sent to any version (web or epaper). There is a limit to what can be asked.

4. Same filters are used for both paper and digital versions – last 6 months, frequency and recency.
5. Those who are interviewed online are tagged and their internet usage can be picked up passively. A limitation is that the tag is on one device and the problem of multiple users on one device.

A consumption survey

- WEMF conduct a consumption survey as part of the readership survey.
- Every 2nd year they include questions on brands and products and other consumption questions.
- This is asked of half the respondents.
- This survey is used as a hub and the other media data are fused into it.
- This is called the Total Audience – it currently only includes print and digital but they are negotiating with the other JICs.

Intermedia

- Questions are becoming increasingly important about overlapping media consumption (total audience), time budget used and the engagement of individual media or combinations of media.
- WEMF has done its own initiative with TV and radio and then added print and outdoor.
- They use fusion to merge data.

Total Audience 1.2

- 2013 is the 3rd release of Total Audience 1.2.
- This was conceived as a complementary study to the intermedia study. The total audience allows the analysis of combined data of paper publications and the corresponding website of a media brand currency level.
- The total audience is the first study of its kind in the Switzerland.

- The concept developed in cooperation with NET Metrix and provides:
  - the gross reach of an intermedia combination (print and website)
  - the net range of an intermedia combination (print and website)
  - Duplication (persons with parallel print and website usage)
  - Exclusive user of a press medium
  - Exclusive users of a website

A first step towards an integrated "media research Switzerland"

- From the vision of a data hub integrating all intermedia industry studies, the Total Audience pilot study has created the vision of how this aim could be achieved in the future.
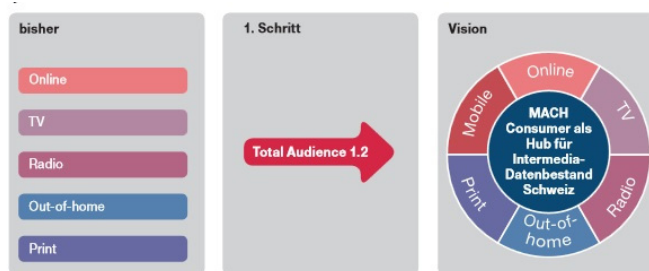
Developments and Innovations

Media brands:

- We discussed the concept of measuring Media Brands.
- The concept:

- While this is considered a viable way forward it must be realised that the reading levels of the paper version will drop dramatically. The industry would have to weather a transitional period.
- But this concept may become more necessary in the future in order to focus the respondents and to shorten the questionnaire.
- In this concept the brand is key rather than the channel

Further Explorations

JIC:	**Commercial Radio Australia**
Contractor:	GfK
Country:	Australia
Medium:	Radio research

New audience measurement system for radio – February 2013

- The radio industry (Commercial Radio Australia) has commissioned GfK as the preferred service provider for radio audience measurement surveys from 1 January 2014.
- Mobile data capture and online recruitment and data capture will be key new features of the next radio audience measurement contract.
- This marks a new era for the future of radio audience measurement in Australia ensuring currency continuity, a multi-mode approach to data collection including plans for the testing of electronic measurement enhancements.
- The new three year contract with GfK introduces an e-diary for computers, tablets and mobile phones, synchronised across the internet and compatible with all operating systems.
- It will be necessary for GfK to conduct further successful **parallel pilot testing** throughout 2013, prior to the new contract coming into force. This will ensure validity of the new processes and multi-modal data capture methods and comparability with the existing currency.
- From the first survey in 2014 there will be a minimum of 20% of survey participants recruited online and completing the e-diary.
- This percentage will be closely monitored with the aim of reviewing and possibly increasing the percentage for year two.
- Also included in the new contract is real-time management and monitoring of the personal placement of diaries to ensure that population potentials for difficult to reach youth demographics are closely reflected in the sample.

An audience behaviour panel

- GfK will also launch a new radio audience behaviour panel which will go beyond the surveys and examine key issues for the radio and media industries including consumption of radio via the internet, platform usage trends, the role of radio in people's lives, mobile and headphone listening.
- This panel will be made up of 5,000 respondents per year with quarterly reporting of key insights.
- These innovations together with the Gold Standard for radio analysis software that will be in place for 2014.
- The training on the new system would be provided by GfK to stations and agencies, before the start of the new contract, CRA will offer comprehensive briefings to agencies and advertisers on the new survey methodology and the progress of pilot tests.

- Trials in 2012 of e-diaries were very positive leading to the significant changes to be made to data collection in the next contract.
- "At this stage, no electronic device has proved to be reliable or robust enough as the sole measure of radio audience measurement given the scale and complexity of radio's requirements. However the industry is committed to investigating with GfK in the first 24 months whether there is a device that may be integrated into a multimodal approach and would be both feasible and cost effective."
- The Australian Broadcasting Corporation (ABC), the Media Federation of Australia (MFA) and the Australian Association of National Advertisers (AANA) participated on the Tender Committee and in the tender process.
- They will continue to be involved on the Research Committee to oversee the pilot tests and the move to the new survey provider.

- The new ratings system will include:
  o eight surveys a year in Sydney, Melbourne, Brisbane, Adelaide and Perth as well as three surveys a year in Newcastle and the Gold Coast, two a year in Canberra and one in Wollongong;
  o real time management of fieldwork information to ensure quotas for difficult to reach demographics are met to deliver representative sample composition;
  o proven and tested online and e-diary system used internationally;
  o parallel trials throughout 2013 to ensure validity and reliability of new data capture methods;
  o the establishment of the Gold Standard for radio analysis software allowing for certification of software used for radio audience measurement reporting;
  o a 24-hour diary system that will, initially, include 20% online recruitment and data capture;
  o formation of a new 5000 member panel to track audience behaviour;
  o testing of electronic measurement in the first two years of the contract.

JIC:	**The Readership Works**

Contractor: Ipsos MediaCT

Country: Australia

Medium: Readership research

- The Readership Works have recently launched Australia's new cross-platform audience insights survey which will be called emma (Enhanced Media Metrics Australia).
- The new measurement survey has been developed by independent research company Ipsos MediaCT.
- emma's methodology will be surveying over 50,000 people a year, seven days a week using sophisticated survey techniques.
- When it launches, emma will feature a number of significant innovations and enhancements including:
  o A more in-depth database of all newspaper and magazine formats capturing data across print, website, mobile and tablet
  o Branded sectional data within newspapers
  o Contemporary segmentation and new insights into product categories.
- Ipsos was appointed following a tender conducted by The Readership Works in 2010 and has since built the new survey and collected 18 months' worth of data to provide the industry with trends and comparative data.
- To ensure the industry's needs are met and exceeded throughout this development period, The Readership Works (TRW) and Ipsos have consulted extensively with industry bodies including the Media Federation of Australia (MFA), which sits on the TRW board and technical committee, Magazine Publishers of Australia (MPA) and the Australian Association of National Advertisers (AANA).
- Leading media research industry experts, including Ian Muir and Sol Lebovic and independent auditor Dr Rob Hall, have also been consulted from the outset.
- The survey will launch in the first quarter of the new financial year.

Nielsen data to be married with Australia's emma
- Australian industry body The Readership Works is to work with Nielsen to merge the latter's Online Ratings data with its forthcoming cross platform audience insights survey 'emma'.
- emma is the association's new newspaper and magazine readership survey, is funded by the newspaper industry and is a direct competitor to the existing metric run by audience measurement firm Roy Morgan.
- Nielsen's IAB Australia-endorsed online audience ratings data will be delivered to Ipsos MediaCT, which is running emma, and the two independently audited data sets will be combined, giving emma subscribers information on how audiences engage with newspapers and magazines across content delivery.
- The emma and Nielsen data fusion represents global best practice at work. They are employing widely accepted techniques from other markets where Ipsos conducts national audience surveys such as in the UK for the National Reader-

Company:	**IPA's Touchpoints survey**

Contractor: Ipsos Media CT (Hub Survey) and RSMB (Integration)

Country: UK

Medium: A consumer-centric multimedia database

What is TouchPoints?
- IPA TouchPoints is a consumer-focused, multi-media database which has been produced specifically to provide insights into how people use all media.
- It provides two distinct databases:
  o **The first**, the Hub Survey, provides a detailed view of 'a week in the life' of consumer behaviour.
  o A representative sample of 5,500 adults (15+) record their activities for every waking half hour over a seven day period, giving a unique view of people's daily lives and how their media usage fits into these patterns. This is captured on an e.Diary.
  o A self-completion paper questionnaire is also used to record attitudes, product ownership, shopping and media behaviour.
  o **The second database**, the TouchPoints Channel Planner is a multimedia channel planner. It has been created by integrating the industry media currencies onto the Hub Survey.
- In addition, users can integrate their own databases or proprietary tools to build a more complete picture of their company, clients and brands.

- The **e.Diary** records information:

By half hour:
Where were you?   Who were you with?   What were you doing? If travelling, mode of travel and reasons for travel. Media consumption. Shopping in person or online and amount spent. What mood were you in? Emoticons - were you alert or relaxed?

At the end of the day:
Advertising mail. Telemarketing calls received. Commercial text messages received and email messages received.

The **self completion questionnaire** asks respondents for

36

their attitudes and habits in the following areas:

Television, radio, press, outdoor, cinema and online

SMS text and picture messaging

Event and broadcast sponsorship (selected events)

Direct marketing, word of mouth

Technology ownership

Lifestyles, attitudes, shopping, travel

The TouchPoints Channel Planner:

With models for SMS and Direct
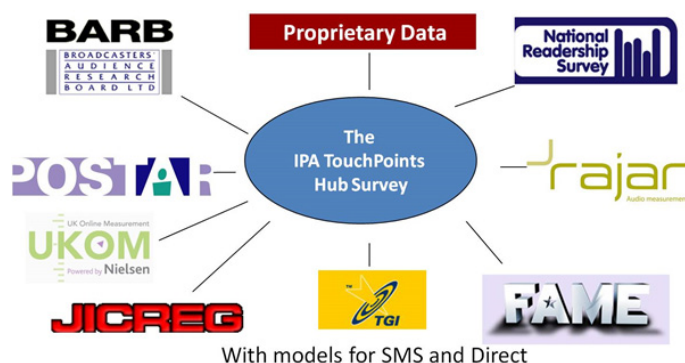
The expansion of the TouchPoints Hub and creation of the TouchPoints Channel Planner is conducted by RSMB, and has two stages:

o **The first stage** of the process is to expand the Hub Survey onto the BARB Establishment Survey.

o This effectively creates an average of nine clones for every TouchPoints Hub Survey respondent, delivering an operational sample size of approximately 50,000.

o Whilst not increasing the effective sample size, the expansion allows all industry media currency respondents to be used in the integration process.

o This technique substantially strengthens the match of media research currencies to TouchPoints.

o **Stage two involves** 'fusing' media currency data onto the expanded 50,000 TouchPoints database.

o A series of hooks across the media are pre-defined within the self-completion and e.diary, these include demographic and household composition descriptors, but crucially also the media patterns of consumption.

o The combinations of these hooks allows TouchPoints respondents to 'receive' media currency data from the most relevant currency respondents.

• In the case of media for which there are no industry-approved trading currencies such as Search, SMS text and direct mail, contact probabilities from within TouchPoints have been created to enable them to be included in multi-media schedules.

• To enable maximum value from the Channel Planner, specialist analysis software is needed, provided by companies such as IMS, KMR and Telmar who have been key partners throughout this initiative.

• These systems enable users to create combined coverage and frequency across the channels out of the personal contact probabilities created in the integration process and the cross-media coverage inter-relationships which were carried across from the Hub.

• In combination, this data allows 'currency level' coverage and frequencies for individual and combined media channels to be calculated for the user defined target markets.

• Users are able to input planning criteria according to a me-

dium's own conventions but outputting as common measurements showing total GRPs, coverage and frequency.

Software Bureaux

Some requirements for the software bureaux to facilitate data loading, statistical and technical processes:

• An electronically readable codebook should be provided. Currently it is supplied as a PDF file in South Africa. This requirement should be built into the contract with suppliers.

• Greater involvement of bureaux with suppliers at the planning stage of research.

• JICs should act on behalf of the bureaux in ensuring that the research suppliers provide formats and documentation on any changes that are going to take place.

• Rate cards, branding and flighting codes should be standardised (particularly for TV). While this is not a function of the research measurement per se, it does impact on the end user and could be something the JICs consider implementing.