US outdoor audience measurement initiatives

Joe Philport, Traffic Audit Bureau, describes a new integrated research programme that recognises a survey alone is not enough

FOR MANY YEARS, the fortress of traditional media research was secure. The established standards of survey research provided a strong foundation for the currency ratings systems of most consumer media. However, in recent years more media channels and new delivery platforms have strained the limitations of both the standard measurement instruments (for example, radio diaries and people meters for TV) and the sample sizes that support these surveys. In fact, it is common knowledge that the ratings of some media vehicles are smaller than their standard error.

It is perhaps ironic that in the United States, out-of-home media, the industry's oldest advertising medium, is now challenging the wisdom and rules of media research, and leading innovation.

New windows of opportunity are opening for outdoor media in the US. There are a number of reasons for this:

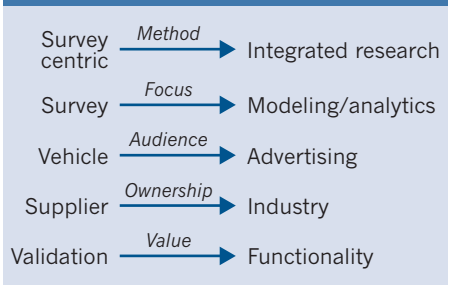
- a renewed interest in the value of integrated marketing programmes and the accompanying move to channel planning
- the erosion of traditional electronic and print media audiences
- the advent of new and powerful forms of digital outdoor media
- an ever more stringent demand for accountability by advertisers.

However, the full opportunity and value of outdoor media will be recognised only when it has a world-class audience measurement system.

It was this need that motivated the members of the TAB (1) to hold two industry-wide research forums and then form a Technical Committee (2) to investigate our research options and issue RFPs for suppliers to implement the research.

FIGURE 1

A paradigm shift



Global learning provides a strong foundation

Over the past few years, many countries have begun building new outdoor measurement systems. In a 2003 issue of *Admap*, Jarvis and Eddleston reviewed the state of the art of global out-of-home research. Since their landmark article, a growing body of evidence has supported a clear rationale for the integrated research approach. The path being taken in the US is similar to the directions being followed in such countries as the UK, Germany, and Australia (to name a few). It appears, as Jarvis and Eddleston suggested, that global guidelines are evolving to form the best practices being employed around the world.

Building a currency measure

This requires more than schedule-level demographics and reach and frequency systems.

As the TAB Technical Committee began its task, we soon realised that merely providing a system that would produce campaign reach and frequency would not meet our industry's needs. The research challenge was to build a measurement system that would be a credible currency for the planning, and buying and selling of the medium in the new channel-planning environment. This would require:

- board-by-board ratings
- consistent audience information in all 200+ markets in the US
- refining the audience definition from a measure of gross passage to actual 'eyes-on' estimates of advertising exposure (a step beyond TV's commercial minute audiences).

In December 2005 the TAB Technical Committee issued an RFP to 20 world-class research companies. Responses to the RFP, along with the research reported at international forums such as the former ARF/ESOMAR Worldwide Audience Measurement Symposia, all supported the need to develop a new research model.

Challenges of measuring outdoor media

In many ways this is similar to that of other media, in others completely different.

Traditional media researchers need to explore transportation research to understand that the sample sizes of most in-home media research are dramatically too small to measure travel reliably. This is largely due to the fragmentation and dispersion of outdoor media and, more importantly, the fact that most travel is non-random.

In a market the size of Chicago, a sample of 25,000 respondents would be required to reliably report audiences of outdoor media in that market via a traditional survey. The industry simply cannot afford to support samples of that size.

Fortunately, there is an alternative, but it requires a radical change in thinking.

Effective use of surveys

The choice is not between surveys, but between a survey and an integrated audience measurement system

This requires a major shift in media research thinking. As we approached our decision, five specific factors were isolated and evaluated (see Figure 1).

1. The movement from a survey-centric research model to an integrated research system was an easy decision. We had no choice. Travel surveys, regardless of the method of data collection, could not deliver what the industry required. They could not reliably deliver board-by-board ratings.

2. Our focus, therefore, shifted from the selection of the travel survey method, to the full range of available data and the analytic tools required to integrate those data into meaningful and reliable audience estimates for all inventory in all markets. In essence, the value of the survey component will be 'down-sized' to a new role as merely a contributor of 'partial information' to the overall information system.

3. The most critical shift was the need to move away from the gross reporting of 'opportunity-to-see' audiences passing the boards (the current standard used by all

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other media) to an actual measure of 'eyes-on' or commercial audience.

The need for 'eyes-on' commercial audience is greater for outdoor than for other media because outdoor generally sits outside the daily media planning and allocation processes.

Outdoor media's gross audience numbers do not adequately discriminate the true audiences of various outdoor media formats and are not truly comparable to other media measurements.

Therefore, they do not work in existing multimedia planning systems. Eyes-on ratings will put outdoor ahead of other media and lead to comparable adjustments to other media ratings.

4. Although not radical for most markets around the world, perhaps the most radical US requirement of the new system was moving from supplier to industry ownership of data. This requirement is derived from three specific needs:

▶ the need to select the best sources for each specific element of the system at competitive prices

▶ the need for flexibility to update and refresh data elements from a variety of sources

▶ in a rapidly changing research environment, the need to embrace immediately new and improved technologies and sources for any element of the system, while maintaining the integrity and value of the other elements of the system.

In essence, these requirements build a 'plug-and-play' measurement system that can keep pace with a continuously and rapidly changing world.

5. The final change involves moving away from a traditional model of validating the research/approach to one based on assessing the functionality and value the data provided to the end-user. By using public-domain and independent traffic data as the foundation for the system, the need for traditional validation is reduced. The real need is to make certain that the information in the system provides maximum value for all users.

The TAB's integrated research programme is currently being implemented.

In three or more years, the US will have 'eyes-on' demographic ratings and reach and frequency for over 500,000 units of inventory in over 200 markets.

But, for now, our research system (see Figure 2) is a work in progress. Here is an update on the key components of that work.

Traffic counts

Site-centric traffic counts (DECs) are a credible and essential foundation of our system. Over the past four years we have replaced a system that had been in place since 1933. Over 90% of these vehicle counts are independently collected by departments of transportation. The remainder are independent 'hand-counts' collected from an independent supplier (not by the media). They are all standardised for DMA or market-level consistency.

However, we recognised the need to add separate measures of pedestrian measurement to the system. As we formally present our timetable and detailed plans to the marketplace later this year, we will include a thorough description of this valuable addition to our system.

'Eyes-on' adjustments (VACs)

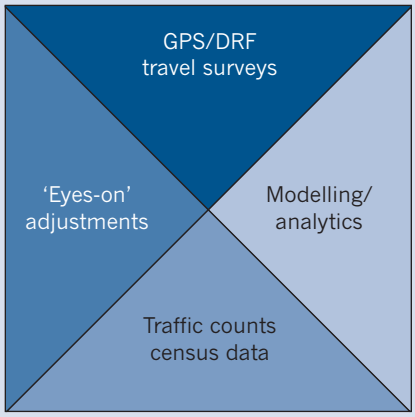
After a separate RFP process, the TAB selected GfK/NOP to conduct a VAC research study. A pilot has been successfully completed and we will field the main study later this year.

As with the original VAI study conducted by POSTAR, our main objective will be to produce visibility scores for the key outdoor media formats in a variety of environmental settings. We have departed from the POSTAR approach in two major ways:

1. to select full-motion video as the simulation technique. The selection of the video option was based on its ability to include new digital formats that change copy in 'real time'

FIGURE 2

TAB's integrated system



Site-centric traffic counts (DECs) are a credible and essential foundation of The Traffic Audit Bureau's system

In the top ten markets, vehicular and pedestrian traffic counts will be integrated with the VAC scores and demographics from the travel surveys

2. to develop separate VAC scores for vehicular and pedestrian audiences; clearly, it is likely that they account for very different exposure opportunities.

After results are tallied early in 2007, we plan to share them with the TAB membership to determine how they should be used in the buying and selling processes. However, our intent is clear – to use these factors to report 'eyes-on' commercial ratings.

Travel surveys

After an extensive and exhaustive review of proposals, the team of GfK/MRI, GfK Eurisko and Telmar was selected to design and execute the travel surveys and subsequent data integration and modelling.

As mentioned, the role of travel surveys in the system has been 'limited' to collecting demographic profiles and as an input into the system's reach and frequency model. The magnitude of board-by-board audiences will be determined by the traffic counts. However they remain important elements that require a 'best-practice' approach. At the time of writing, the specific details of that approach cannot be identified. However, an outline of options can be shared. We will be collecting travel data from over 65,000 respondents in 15 major markets. That information will be gathered from two separate surveys

1. Destination/R&F surveys will be administered to 45,000 respondents in 15 major markets. These surveys will be used to collect start and end points of trips and modes of transportation.

2. Detailed travel surveys in the top ten markets will be used to gather complete trip information over a period of days. We will either use GPS technology or high-quality computer-assisted interviewing to gather this multi-day information.

The Committee reviewed an array of GPS technologies and are not convinced that GPS is the best alternative at this time. It is not a perfect or totally passive technology – it suffers from relatively low response rates, incomplete data, mapping and location inaccuracies, and respondent non-response (for example, not carried for all trips during a day).

However, most of the major problems with GPS will be overcome with time and experience.

When will we move to GPS as a component of our system? When we are convinced that it will add incremental benefit to the measurement without risk to the overall system, at a cost/value that is acceptable.

Modelling

The final, but not least important, component of the system is modeling. This will occur in two stages:

1. In the top ten markets, vehicular and pedestrian traffic counts will be integrated with the VAC scores and demographics from the travel surveys to produce board-by-board eyes-on demographic ratings and reach and frequency for campaign schedules.

2. In the remaining 190+ markets, data from a variety of sources (including census and transportation data) will be combined and pooled with the know edge and learning from the top ten markets to model the same eyes-on demographic information.

The result is that all markets will have the same detail of information.

Refinement of the system

As we announce our plans, they will include the establishment of a foundation market where all the components of the TAB system will be 'in play'. We also intend to over-sample travel survey respondents, to maximise our ability to evaluate the quality and accuracy of the data. This market will be built early in 2007 with the other markets following over the next two years.

Needless to say, we are very excited about building this new measurement system. It is founded on the best practices of outdoor measurement from around the world. It also puts the US at the forefront of outdoor measurement for the first time in many years. And, for the general media research community, it offers an exciting new paradigm for building a 21st-century media research currency. ■

1. The TAB is an industry organisation that comprises media, advertising agencies and advertisers. It has been collecting measures of traffic circulation since 1933.

2. The Technical Committee comprises: Neil Eddleston, JC Decaux; Erwin Ephron, Ephron; Papazian, Ephron; Tony Jarvis, Clear Channel Outdoor; Steve Singer, The Singer Group, and the author. The author acknowledges that the issues and positions expressed in this article were built from the collective work of all the committee members.

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