Is media really being bought across platform/device? Which common metrics will direct future planning?

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WE HAVE BUILT IT – AND THEY ARE FINALLY COMING!

Peter Masson, Bucknull & Masson, UK,
Peter Callius, TNS-Sifo, Sweden,
Stefan Svanfeld, ComScore, Sweden

Of course media are bought across platform – that is what media agencies do but they have not been able to evaluate their cross platform schedule choices. For decades advertisers and agencies have pushed for integrated all media and target group data with a cross platform R&F capability at the individual vehicle level giving results that match their current individual 'currency' surveys. Historically for political, financial and methodological reasons media owners, although paying lip service to the idea, have been more than cool about funding any development in this direction – at least until very recently.

As a result only a handful of fully integrated media surveys in Europe get anywhere close to meeting these requirements. Some of these, emanating from multi-media JICS, constrained by the need for consensus, limit the granularity of the media vehicles that may be cross- related and the frequency with which such data integrations are updated. Both factors severely restrict their value for media agencies.

In Sweden TNS-Sifo have built an integrated data set around the Swedish NRS – Orvesto Consumer/TGI – as a purely commercial operation. Orvesto publishes 3 waves of 15,000 respondents per year plus an annual combined release of 45,000. To the base survey covering newspapers, magazines, cinema, Direct Mail and TGI data, television data (MMS, panel) was integrated first in 2003 followed by Radio (Sifo Radio Planning, DAR), daily reach of newspapers (Orvesto Day, DAR) and web browsing of print titles (TNS-Sifo, panel) by 2009.

The TV and radio data are updated quarterly and Internet monthly. The Internet data is derived from a panel (recruited offline) and an average 4 weeks of panel data is integrated every month into Orvesto Consumer. It is this Orvesto integrated data (within the cross media and TGI environment) that is released to the market as the Internet 'currency' (and not the panel data). The process of integration used for Orvesto (VDiary modelling plus calibration), which is not a 'fusion' process, was most recently described in Peter Masson's PDRF 2013 Nice paper.

The granularity of the data for TV and radio channels is at the average minute level within 15 minute time slots by day of week, Internet is Net visitors and Gross 'page views' within a one hour time slot by day of week. Daily and Sunday newspapers are reported at the day of week level, and Magazines at the AIR level. R&F results for any schedule of reported vehicles are available week by week separately and accumulatively over 'n' weeks against any Orvesto/TGI target group.

So this has been our vision – to produce integrated cross platform data that yields the same results at the same level of granularity as the 'Silo currency' data.

Media Agency response

Our 2011 PDRF San Francisco paper (*If you build it, will they come?*), written jointly with Mediacom Sweden, explained how this leading media agency was able, using the Orvesto cross media data, to evolve a new multi-media planning environment within the agency. They built a new position of Cross-Media Director working with the Strategic Insight and the Innovation Director and instituted a systematic training program for 'silo' planning and buying specialists to gain a broader understanding of the other media categories.

The ability to define *specific targets* for evaluating *all media channels* through Orvesto was seen one of the best drivers for change at Mediacom Sweden

The result: One Campaign – One target.

But what of media owners?

For the first time cross platform audience data had some direct relevance as they are now delivering their content through paper (or TV) and digital platforms, increasingly so since the turn of the decade. So the question is 'are (Print/digital) media being *sold* on a cross platform basis?'

In the last 5 years Orvesto Consumer/TGI has significantly expanded its digital data granularity using inputs from 3 independent panels (Web, covering a respondent's home and business browsing, Mobile and tablet) which are reported in an integrated form within Orvesto. Currently data for some 850 Web sites and subsites, mobile (220 sites), apps, (25 sites) and

tablet (850 sites/subsites) are provided and thus extending a long way down the 'long media tail' of Internet sites. Integrating VOD is in our sights for next year.

At the same time the software (Sesame) was developed so that media owners could conveniently construct and evaluate (R&F) 'packages' of content distributed through paper and their different digital platforms. Within the system Newspapers are schedulable (including multiple insertions) by day of week, while for the digital platforms different proportions (or absolutes) of available inventory (by any combination of hour within day) can be scheduled with ads under different (OTS) capping constraints and under different ad. exposure probabilities between platforms and under different pricing conditions and all within specific and complex (TGI) target markets.

The 'cross platform packages' the media owner decides to make available can then be saved into the Orvesto survey media list so that buyers can evaluate them in combination with any other media vehicles in the survey.

The digital 'Tipping' points

In Sweden the 'tipping point' (where the digital audience exceeds the off-line audience) took place as long ago as the end of 2009 for the evening papers, but not until the end of 2014 for the dailies and is still 3 or 4 years away for magazines, so we see a difference in the response to digital between our newspaper and magazine groups. In contrast local dailies are not experiencing, in the last 18 months, a continuing move to digital with the digital share remain more or less constant at around 40%.
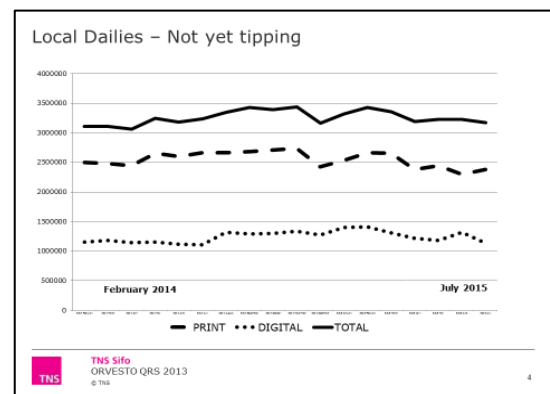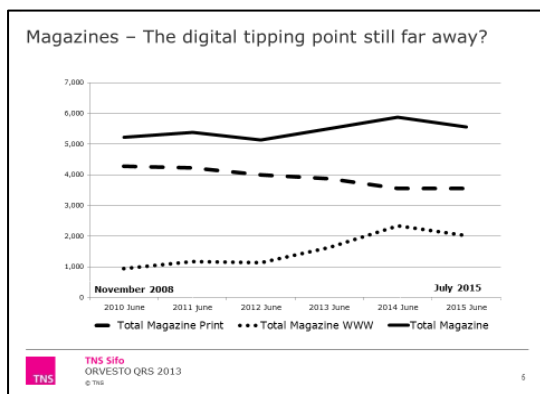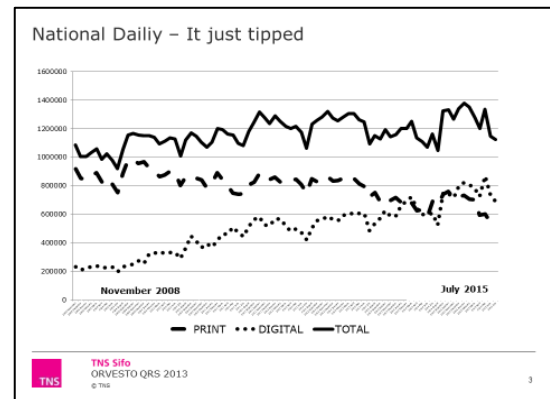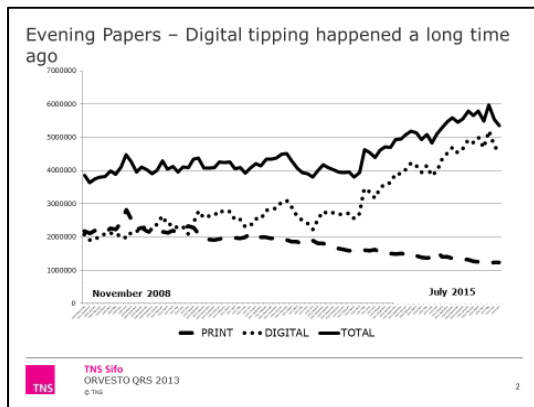
Our Publisher Research

We recently conducted a number of interviews with our major print/digital media houses to establish how they had met the digital challenge and the role that our data and software are playing in their development.

Newspapers admitted to being caught short by the extent and speed of change digital created and especially mobile with the introduction of the Iphone in 2010 and they didn't have a working business model. Indeed one could argue that many of them still do not. As their initially independent on and offline sales teams were 'killing' each other they quickly integrated their sales and the editorial teams into one profit centre with an editorial digital first strategy.

Initially magazines saw digital as the icing on the magazine cake but their digital sales teams were also undermining and diluting the value print with agencies. They went the other way with many deciding then that digital needed to be its own business with its own editorial staff and ad. sales. They now find, however, that the digital power is needed to enhance the traditional print business and bring the brand's DNA into the centre.

On the question of 'packaging' inventory across platforms they admitted it had taken them some time to evolve this but first Newspapers and now magazines are bringing their digital and off line analysis together (through Orvesto) to develop more and more integrated ad. sales packages against *specific target groups*.

In the main these are not generalised packages but built to individual client specifications. They had to learn not to focus too much on digital and lose sight of their own core (print) products in the process. It has worked well with the media agencies and improved their relationships as they now enjoy a higher level dialogue with the agency project manager and not just 'the 23 year old digital only buyer'😊.

They view 'packaging' as yielding better returns justifying premium cpts and demonstrating added Reach of quality audiences in complementary environments. But these package deals do take longer to negotiate. Interestingly for the present it seems it is not so much about maximising the use of their available inventory but getting paid more (premium cpt's) as they could sell more inventory than they actually have.

Disparate cpt rates between print and digital delivery platform did not seem to be a primary issue. The larger differences in cpt pricing are based more on the differences between publishers offering high cost versus low cost environments (premium versus low value programmatic) than between the different delivery platforms.

Asked specifically whether the comparative 'currency' measures of 'page views' and newspaper 'daily issue reach' and 'magazines AIR' were sufficient the answer from the newspaper sector was 'Yes' but the magazine sector would like to get closer to 'ad impressions'.

Their conclusions for now: Orvesto provides one currency and one world for all our brands – but we need to use it more. (*If they build it will they come?*)

Specifically asked about the importance to them of 'Total Brand reach' they all said at the start 'not at all', but later they found it important for everyone, management, clients (to show momentum) and staff and the owners to know how the total brand was evolving and they were not in crisis.

So now in the progression of steps to establish print's position in relation to digital we start with Total Brand Reach
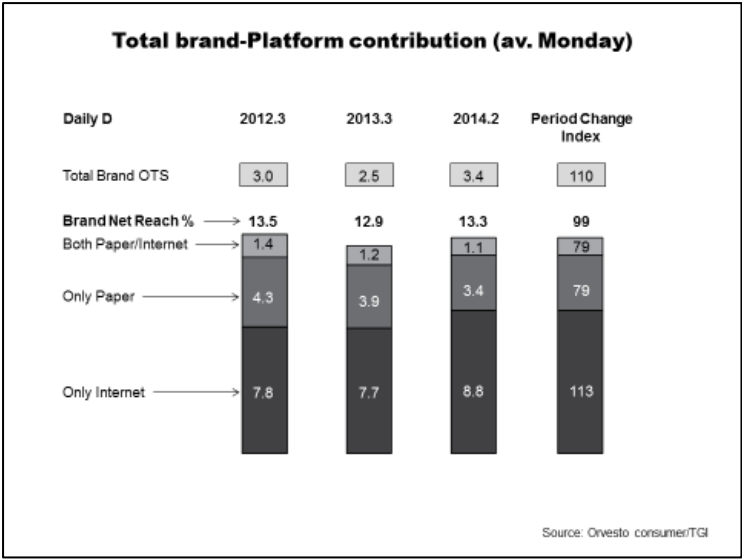
Total Brand Reach

Regularly reported Total Brand Reach is essentially a health check for the brand but clearly it is also an editorial and marketing performance and evaluation tool. 'Total Brand Reach' is of course within the total data set of Orvesto and we extract it to produce a monthly summary trend 'product' branded 'Orvesto TOTAL' and made available to clients over the Web.
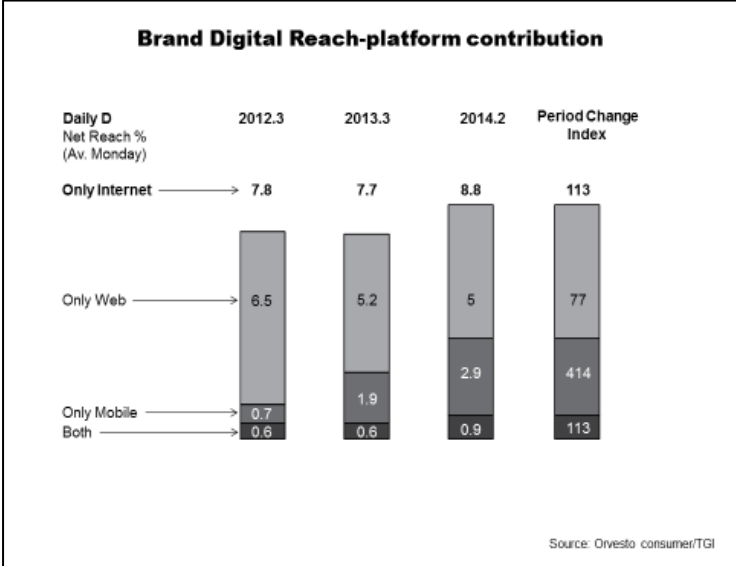
Below are Total Brand Reach examples for a daily evening, a daily morning and a weekly women's magazine and how the different platforms contribute to Total Reach.

It is sensible to report Total Brand Reach on the basis of a publication's frequency, daily for dailies and weekly for weeklies and so on. We have chosen to report the daily and the evening below for an average Monday – simply to demonstrate that we have this level of granularity. The data can equally be produced at the average day level or weekday versus weekend level.

Daily D saw a notable dip in Total Brand (Monday) Net Reach in 2013.3 as its Internet audience not only failed to make up the Print decline (-9%) in reach, but was actually lower than the prior year (-3%). But by mid-2014 it had improved its Net Internet audience to a level that all but compensated for the Net audience loss (-1%). But if we look at the OTS delivered per Net person reached then the 'Page Views' served were actually up 10% over the period providing more ad. serving (and thus revenue) opportunities. At the start of the period the 'only paper' contribution to Total Net was 31% but by the end it was down to 25% (-19%).
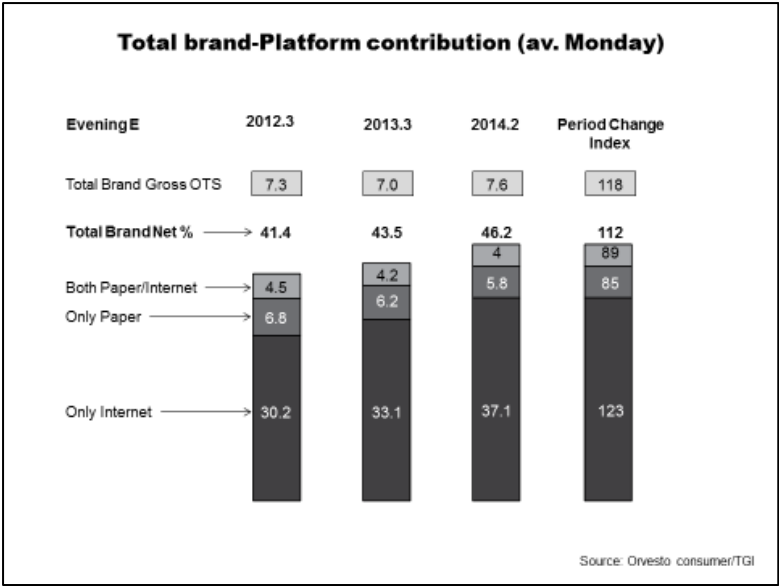
Total brand-Platform contribution (av. Monday)

Daily D	2012.3	2013.3	2014.2	Period Change Index
Total Brand OTS	3.0	2.5	3.4	110
Brand Net Reach %	13.5	12.9	13.3	99
Both Paper/Internet	1.4	1.2	1.1	79
Only Paper	4.3	3.9	3.4	79
Only Internet	7.8	7.7	8.8	113

Source: Orvesto consumer/TGI

If we look more closely *within* the Internet audience *(chart below)* we see a 23% decline in the period of only (=solus) Web Net Reach but a more than four-fold increase in the Solus Net Reach of mobile. Clearly its recent fortunes are a function of success with its mobile platform.

Brand Digital Reach-platform contribution

Daily D Net Reach % (Av. Monday)	2012.3	2013.3	2014.2	Period Change Index
Only Internet	7.8	7.7	8.8	113
Only Web	6.5	5.2	5	77
Only Mobile	0.7	1.9	2.9	414
Both	0.6	0.6	0.9	113

Source: Orvesto consumer/TGI

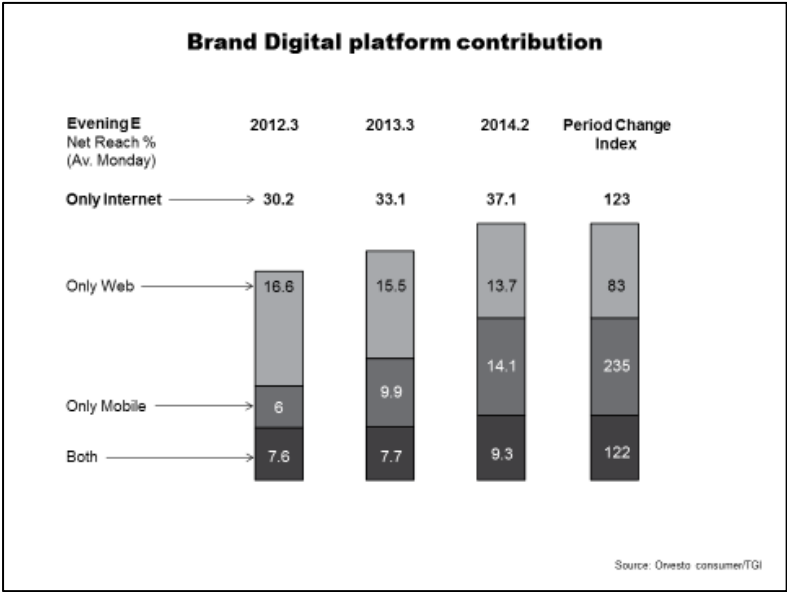The Evening E (chart below) has built consistently Total Net Brand Reach over the period increasing by 12%. 'Only paper' was down 15% over the period with its share of Total Brand Net down from 16% to 12.5% (-22%).
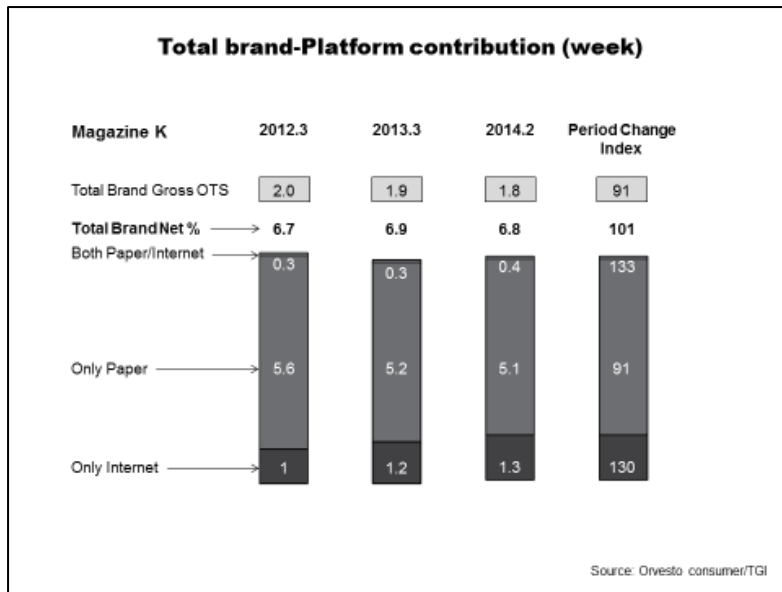
While its daily (Monday) Net Brand Reach is 46.2% (2014.2) each member of the Net audience visits the site on average 7.6 times. Its daily inventory against which to serve ads. is huge 351% of the total population.

Total brand-Platform contribution (av. Monday)

EveningE	2012.3	2013.3	2014.2	Period Change Index
Total Brand Gross OTS	7.3	7.0	7.6	118
Total Brand Net % →	41.4	43.5	46.2	112
			4	89
Both Paper/Internet →	4.5	4.2	5.8	85
Only Paper →	6.8	6.2		
Only Internet →	30.2	33.1	37.1	123

Source: Orvesto consumer/TGI

Again looking in detail *(chart below)* we see Evening E has grown its Internet Net audience by 23% over the period but also with 'only Web' declining (-17%) and again the growth coming clearly from mobile (135%).

Brand Digital platform contribution

EveningE Net Reach % (Av. Monday)	2012.3	2013.3	2014.2	Period Change Index
Only Internet →	30.2	33.1	37.1	123
Only Web →	16.6	15.5	13.7	83
			14.1	235
Only Mobile →	6	9.9		
Both →	7.6	7.7	9.3	122

Source: Orvesto consumer/TGI

Magazines are not yet in the digital space to the same extent as newspapers. In the case of Magazine K at the start of the period 'only paper' represented 83% of Total Brand Net reach but by the end only 75% (-10%). Overall the period it shows a small increase in Total Brand Net Reach (1% gain). However while its net digital audience had increased to compensate for the net loss of print the overall gross contacts (OTS) per person decreased by 9%.

Total brand-Platform contribution (week)

Magazine K	2012.3	2013.3	2014.2	Period Change Index
Total Brand Gross OTS	2.0	1.9	1.8	91
Total Brand Net % →	6.7	6.9	6.8	101
Both Paper/Internet →	0.3	0.3	0.4	133
Only Paper →	5.6	5.2	5.1	91
Only Internet →	1	1.2	1.3	130

Source: Orvesto consumer/TGI

'Total Brand Reach' is usually only thought of in Net terms but, as in our examples, the total gross audience needs to be included to give the full 'Brand health' picture. Total Brand Net Reach may be static or even declining somewhat but yet Gross Content delivered may be rising showing increasing ad. serving revenue opportunities. And it is Gross Page Views, browser request by browser request, that are the basis of Internet buying.

The focus on NET reach creates huge limitations

To limit the scope of 'Total Brand Reach' studies to only Net reach performance, not only fails to provide the full 'Health Check', it also precludes the data becoming part of the agency Planning and Buying process and reduces it to 'nice to know' information and indeed it is not always 'nice for them to know' from the publisher's perspective if Total Brand Net Reach is declining.

Influence in the agency cross platform budget allocation

It seems to us necessary for publishers to have access to a full R&F capability using current data from which to build Print/Digital packages (or indeed to include other platforms (TV/Radio) within their Media Group inventory). They can then enter more closely into the agency cross media planning and buying process giving the opportunity to influence the allocation of budgets between print and digital. If they do not then the rapidly increasing programmatic buying of digital, with its attendant economies and increased profit opportunities for media agencies, will draw more and more ad. spend into the digital arena and away from Print.

Creating comparable media metrics (also known as the 'War of the Media Weights' WRRS 2009)

In the budget allocation 'battle' the print side of the 'package' has to make its case 'against the digital' side. Normally 'added Net reach' of the specific target would be a demonstrable argument for print but the down side will be a loss of frequency.

The almost universal print Recent Reading (RR) model does not take multiple reading events into account and assumes only one reading event during the life of an (magazine) issue. In contrast every time a browser visits a site a new 'Page View is established. Consequently magazines (and newspapers to a more limited extent) will be disadvantaged in gross (frequency terms).

On the other hand the RR model measures the audience at the issue level not of an ad. page within it, This contrasts with the visitors to a specific (ad.) page as measured by Internet site centric and panel systems.

To balance this situation we can use data from the TNS-Sifo Quality Reading Survey which reported '*multiple reading occasions*' and the '*proportion of issue read*'. The 'proportion of issue read' provides an estimate, in conjunction with the respondent's claimed multiple reading events, of those seeing an average (ad.) page. These data are well known but they are rarely integrated into (or researched as part of) a standard NRS. As we have integrated them we are able to apply these claims at the individual respondent level in the software to correctly reflect differences in multiple reading events (for example) between heavy, medium and light readers.

	Orvesto Cosumer 2012:3 QRS		Target: All Pop				
			%	%	Av.	Base	Total Cost
			Gross	Net	OTS	cpt	
1	P Mag	AIR	7	7	1	140	71500
2		% read/pick ups	9.5	5.4	1.8	102	71500
3	P Mag Web		6.1	1.9	3.1	100	44494
4	AIR/Web package		13	8.4	1.5	121	115994
5	Pick ip/Web package		15.6	7	2.2	101	115994

Line 1 reports the standard AIR results, 7% Net Reach = Gross Reach = 1.0 OTS and a cpt of 140.

Compared to Line 3 the cpt Gross reach is 40% higher than the Web Platform

In Line 2 we apply the 'Proportion of Issue' read claims (respondent by respondent) which reduces the Net Reach (from 7% to 5.4%) but also include the 'number of times picked up' claims (also respondent by respondent) which pushes up the OTS to 1.8 bringing the cpt down to 102 in line with the Web cpt.

With 'Print's' historic pre-occupation in its sales arguments with Net this Net reduction may be anathema but in the digital world it is gross contacts at the page level that count (and are counted).

So in the combined Print/Web package offer for P Mag (line 5 where the Print '% read' and 'pick ups' claims are included) Gross Reach increases by 20% (13.0% up to 15.6%) compared to using the standard RR model data (line 4) and equalizes the 'package' cpt with the Web cpt – but at the expense of Net Reach which decreases from 8.4% to 7.0%.

How much frequency is gained depends on how many reading events the title obtains and the proportion of issues read. In fact P Mag was one of the lowest scoring with only 1.8 pick-ups on average and 78% of the issue read on average. The highest scoring titles like the TV programme magazines had 85% of issue read scores and average pick-ups of 5.0.

Media House/Group packages

Compared to newspapers, magazines in Sweden are individually quite limited in Reach and all still with quite low proportions of digital delivery. The gross contact delivery ('PV's) of Evening E (paper and digital) was over 350% of the total population, for P Mag it is only 16%. *It is clear that to get the attention of agency cross media planners/project managers magazine publishers will need to create from within their Media Houses multi-title packages to create significant volume* although such 'brand' combinations will tend to dilute the targeting value of special interest titles.

Digital site metrics

Now we have to consider the metrics used on the digital side and consider if they provide 'fair' comparisons in cross platform comparisons. In fact what we are saying is that while a 'currency' may be acceptable for vehicle comparisons within its own media type (since all media will be subject to more or less the same biases) it will not be necessarily acceptable for cross platform comparison. We should therefore be prepared to accept adjustments/modifications to the silo 'currency' data to create more reliable cross platform comparisons.

Calibration to 'currency' site centric measures

At the present time the Gross measures and the Net measures for each day found in our Web, Mobile and tablet panel are calibrated to the site centric data. This site centric data is supplied to TNS-Sifo largely by the publishers. There are several site centric suppliers used by different publishers each of whom must conform to current KIA standards particularly with regard to the exclusion of non-human traffic.

We have no option other than to calibrate our Gross panel results to those supplied and these levels are the basis for the Orvesto Consumer integrated cross platform data. However if they were to change than it a trivial matter to re-calibrate to different levels. In the meantime we need to make judgements using external aggregate information to adjust the relationship to provide a more realistic comparison between digital platforms and print.

Current site centric measures are likely to produce Page View estimates that are significantly higher than the ad. impressions that advertisers think that they are buying. (Note the *Callius, Ekman, Sandvik, Østnes paper PDRF 2015*: **Will Print drown or surf on the third wave of digital advertising?**)

Universe issues

The first two issue are debatable about whether adjustment is required, but need to be transparent. Some Page Views emanate from browsers that are outside the target group of most advertisers. For example browsing from IP addresses that are from outside Sweden. If the advertiser has no distribution in the country of their origin then the contact is of very limited value. IP addresses are identifiable and can be eliminated but this is not the case in Sweden at present.

Equally browsers can have users behind them that fall outside the income earning age range – basically the 5-15 age group. They are nevertheless important for brand image development and as 'influencers' within the household. Orvesto Consumer measures only from 16 years upwards (to 80). Calibration to 5+ site centric browsing levels distorts the 16-80 Net and Page view levels and profiles. But for the present there is no reliable way to remove them. While a panel provides an estimate (of 16-80 year olds) browsing behaviour it always a limited sample (in comparison to site centric census data) which is why we choose to calibrate it in the first place.

Viewability issues

Ad. viewability is the next area of comparative bias and worldwide this is now being addressed. It is being defined as 'the point at which the creative message is available to view', thus following the principle of OTS (the advertisement). The current definitions being supported by the IAB and the MRC are that 50% of the ad. must be in view for 1 second and for video the player must be in view for at least 2 seconds.

Such a definition brings us quite close to the average page exposure measure (based on 'Proportion of Issue' read) for Print and thus the need for judgemental ad. exposure adjustments is partially removed (we estimate for Sweden that 32% of impressions bought are not viewable in these terms). Their remains issues of ad. size differential and the effect ad. size and ad. clutter has on ad. visibility and brand image perception.

The overall size of the 'page' between platforms is most probably neutralized as readers/viewers will adjust their viewing distance (to a mobile screen, tablet screen, PC screen and to a newspaper or magazine page) so that it appears of relatively similar size with text legible.

However the advertisements that are 'served' onto that screen or page are different. Most normally in a magazine situation the ad. will occupy the dominant (solus) position on the 'page' but in the digital environment multiple and relatively small ad. units compete with each other for attention. Further these small ad. formats could have difficulty in portraying brand status and/or content (although 'click through' can yield infinite information to those interested). These debates are hardly new within the print arena and should not be ignored in the digital arena.

Ad. blocker issues

When we use site centric measures we use the page browsing levels as a proxy for ad. servings. This becomes a very poor proxy when ad. blockers are being used. Ad. blocking is growing rapidly and has hit the mainstream with Apple's high profile entry into this space.

Perhaps there is little wonder that users are turning to ad. blockers after years of unfettered and intrusive ad. servings based on behavioural targeting with intolerable ad/edit ratios on the page. An interesting piece of research from RAPP-UK – a leading London creative agency and InSkin media - an online advertising solutions company, is reported in Annex 1 which highlights the damage that can be done to a brand from 'overkill' using behavioural re-targeting and also the value that editorial context can bring to the brand (see our section below site environment issues).

The TNS-Sifo on-going AD BLOCKER survey showed a 2.8% point gain last month meaning now 20.5% of ad. impressions bought in Sweden today do not get through the ad-blockers.

We can weight these out of any comparative print/digital analysis but only at an aggregate level but not all target audiences will exhibit the same level of ad. blocking. For the present we might expect it will be target groups with a high content of the technically savvy but we cannot reflect this with a population average figure. It is therefore increasingly important to measure ad. blocking data at the individual/target group level.

For some time now we have provided a post campaign evaluation service to our clients based on monitoring in our panels the actual number of ads. served to the page. Ads will only arrive on that page if no ad. blocker is present. We will be able to observe the differences in levels between the site centric proxy Page Views and the ad. server actual 'Ads served' results by site within key target groups. We will then be able to apply these actual 'reduction' factors within different target groups to the reach and frequency levels within the integrated Orvesto Consumer/TGI data base.

So for the future we expect that the current judgements that we apply (viewability, ad blocking for digital and gross ad. page view for print) will, in the quite short term, be quantified and applied at the respondent level in our integrated R&F analyses.

Site (and title) environment issues

But there remains one major area that we need to find a way include. Our publisher clients reported that their primary issue was raising and justifying higher cpm's, as prime advertising sites within the digital (programmatic) buying situation.

Of course their Orvesto reach and profile data for detailed target groups is already available but we need also to account for the value of the environment into which the ad will be served (and published). In particular a trusted editorial environment and where the advertising volume is acceptable to its visitors.

In this respect we commend the initiative of VDZ (Verband Deutscher Zeitschriftenverleger) in their 'DIGITAL EDITORIAL MEDIA' research (presented at the FIPP Innovation Forum, May 2015 Amsterdam). From this research they have been able to create a VDZ certification of ad. environments as being 'Prime Sites'. Their research showed the designated 'prime sites' index more highly on editorial competence, reputability and trustworthiness *and brand image transfer and enhancement* and are the elite of ''Editorial sites (i.e. those that author their own journalistic content), which in themselves outperform 'Functional' media sites (e.g. Search) and 'Social Media' sites.

It is clear that our integrated cross-platform evaluation system values could and should be enhanced to reflect user's opinions about the editorial values of the sites (as we currently do for print titles in the Orvesto QRS) and the correlation of these editorial values with brand image enhancement. These could be expressed as relative editorial brand 'lift' values in the schedule R&F evaluation process – print as well as digital.

Our conclusions

· We have built it – and they are finally coming! both the agencies and publishers. But we need to continue to refine the model.

· Publishers are understanding that they must get to influence the print/digital budget allocation at a higher level within the agency.

· 'Packaging' volume offers of print and digital enable this and are yielding higher returns. But it requires fully integrated data set with full R&F analyses *against specific (TGI) target audiences* in order to have this agency dialogue (not just Net reach analyses).

· Total Brand Reach trends are an important 'health check' and an internal brand evaluation and development tool – but Gross measures should be part of the equation.

· Silo 'currency' data does not provide comparable cross platform comparisons because of the different research methods and metrics employed.

· We have identified the areas of metric non-comparability between print and digital. In most cases we will be able to move, in the quite near future, from compensatory aggregate judgement values to research based values that we can apply at the respondent level.

· For the moment the exception to this is establishing relative editorial environment values and their transfer to brand image enhancement. A subject for our 2017 PDRF paper- we would hope!

Appendix 1

In late 2014 RAPP-UK – a leading London creative agency and InSkin media - an online advertising solutions company reported from their research on the effects of 'overkill' and site environment. They found only 10% of consumers are more likely to buy something after seeing the same ad. served repeatedly based on their previous web surfing behaviour.
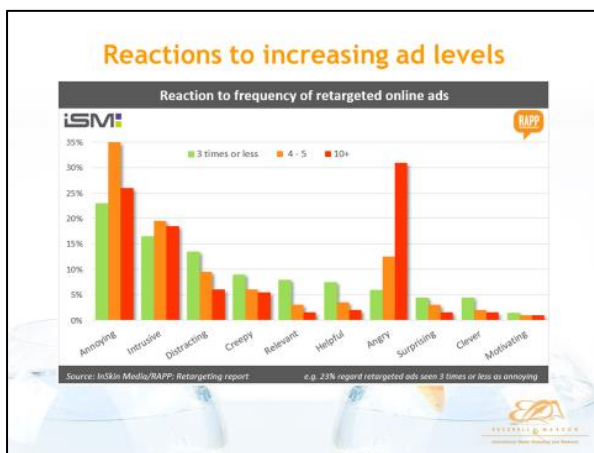
The chart above shows different types of reaction to three exposure levels , 3 or less exposures (green), 4-5 (orange) and 10+ (red). In the first two sets of bars on the left 23% are **annoyed** and 19% find it i**ntrusive** at even 3 exposures, and at 10+ exposures over 30% are **angry** and only 1 or 2% find anything over 3 **motivating.**
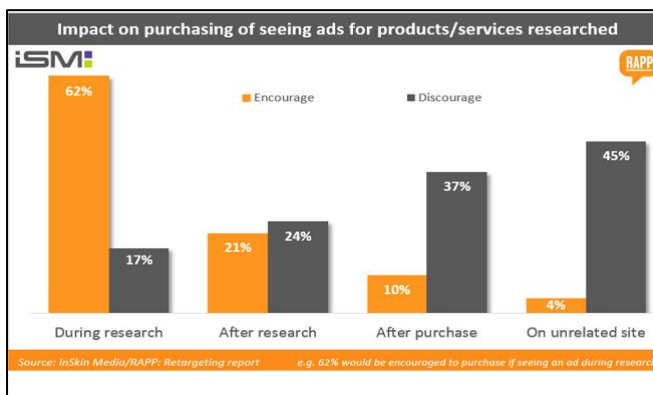

The study also indicates that people are four times more likely to be encouraged than discouraged to buy something if they see a relevant ad. during their 'search' on a related subject. (The left had bar in the chart). But this is reversed if the ad. is served after their purchase. The **timing** of the ad delivery is critical.

Further ads served on *unrelated sites* are over 11 times more likely to *discourage* than encourage a purchase. So *environment* is key.

Brand qualities invoking *trust* of a site were also found to have a big impact on how advertising is perceived.

A Land Rover ad. on *The Independent* website was 71% more likely to be rated positively than on lesser-known site, Catster.
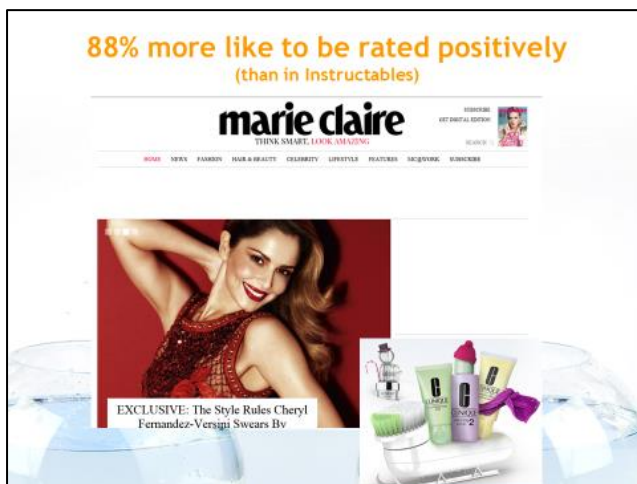
Amongst women respondents, a Clinique ad. on the Marie Claire site was 88% more likely to be rated positively than on lesser-known site, Instructables. *Editorial brand values matter.*