AT THE END OF THE TUNNEL?: A “NEW WAY” TO CARRY ONLINE MEASUREMENT IN SPAIN

Carlos Lozano & Fernando Santiago (AIMC)
Start of the History

- **AIMC-IAB agreement**
  - Formal establishment of the Framework agreement: June 2007
  - Objective:
    
    "Define the ideal conditions to improve audience measurement in interactive media and to boost growth of investment"

- **Situation until the agreement**
  - Nielsen: activ operator since 2002, widespread leader, but…
    - Without reference data accepted by the market
    - Without independent audit
    - Without Clients Committee (CC)
The agreement AIMC-IAB: effects in the market

- Digital Group (June 2007)
  - White Paper (June 2008): “Guidelines for good practise in digital audience measurement”

- Digital Measurement Council (June 2009)
  - Requirements for online measurement

But it is not enough…
The agreement AIMC-IAB: effects in the market

- Request for proposals about online measurement services (July 2011)
  - To establish the Contracting Committee (December 2010)
    - Define the Technical Specifications
    - Evaluation of the offers
  - Tender resolution (October 2011)

comScore
And now: The monitoring Committee

- **Monitoring** (January 2012)
  - Control and monitor of comScore measurement operation
  - Establishment a roadmap with milestones to complete
The process
2007-2009: Digital Group IAB/AIMC
Digital Group

- Created in June 2007 and coordinated by AIMC and IAB

- It is a forum, that works like a JIC, and composed of industry representatives
  - Advertisers (1) / Agencies (3)
  - Media (2) / Web Portals (2) / Ad Networks (1)

- Aims:
  - To define the best conditions to improve the online audience measurement (the White Paper)
  - To increase the investment in advertisement
  - To reach an agreement about the online measurement
Digital Group

Actions:
- Intermediate with the current or potential measurers (Nielsen / Nedstat / Weborama / ComScore)
  - Communicating market needs
  - Proposing quality requirements
  - Working towards the existence of control and audit organs
- Looking for transparency
- Communicate to the market the work evolution
  - Attend to forums (VII Encuentros Internacionales AIMC, nov. 2007, nov. 2011; Inspirational IAB, nov. 2008 y nov. 2009)
Digital Group

- White Paper IAB-AIMC: “Guidelines for good practice in digital audience measurement” (June 2008)

- General Principles of Digital Audience Measurement
  - Uniqueness
  - Usefulness for advertising
  - Adaptability to local market
  - Consensus
  - Transparency
  - Solvency and viability
2009-2010: Digital Measurement Council (DMC)
Digital Measurement Council

Functions

- monitor the implementation of White Paper
- boost Clients Committee
- advice the CC
- ensure the existence of an auditory for the measurers
- work for the implementation of methodological and technical improvements.
Digital Measurement Council

- **Actions (1)**
  - **Evaluation of activ measurers in Spain**
    - Demoscopic methodological: Nielsen y ComScore.
    - Technical methodologies: Weborama y Nedstat
  - **Benchmarking of the measurers**
    - How the measurers work
    - Willingness to control and audit
    - Panel Methodology, meter, hybrid data
    - Data management
### Digital Measurement Council

**Benchmarking of the measurers → 1Q 2009**

<table>
<thead>
<tr>
<th>OPERATIONAL</th>
<th>CONTROL ARRANGEMENT</th>
<th>METHODOLOGY</th>
<th>DATA MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total countries</td>
<td>Users Committee in Spain</td>
<td>Project in Spain</td>
<td>Data Tools</td>
</tr>
<tr>
<td>Total Europe</td>
<td>Users Committee - Other countries</td>
<td>Methodology Panel in other countries</td>
<td>Data Query / rankings</td>
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<td>Audience measurement</td>
<td>Power decision</td>
<td>Reference Data</td>
<td>Minimum unit of analysis</td>
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<td>United Kingdom</td>
<td>Composition CU Spain</td>
<td>Panel - Market Reference</td>
<td>Historical data</td>
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<td>Capture system of the sample</td>
<td>Targets creation</td>
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<td>Panel Management Documentation</td>
<td>sociodemographic disaggregated</td>
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<td>France</td>
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<td>consumption</td>
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<td>Holland</td>
<td>associations</td>
<td>Selecting respondents</td>
<td>attitudinal</td>
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<td>Sweden</td>
<td>others</td>
<td>Labelling - Devices</td>
<td>Planning and probabilistic data modules</td>
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<tr>
<td>Spain</td>
<td>CC Membership in other countries</td>
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<td>Sample Data</td>
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<td>Workforce in Spain</td>
<td>Decision on its composition</td>
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<td>Access to raw data / disaggregated</td>
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<td>Business template</td>
<td>Audit in Spain</td>
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<td>Technical staff</td>
<td>Auditing - Others</td>
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<td>Customers in Spain</td>
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<td>Autonomy of operation</td>
<td>audit scope</td>
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<td>Troubleshooting</td>
<td>Frequency of audit</td>
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<td>Disposal for local audit</td>
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<td>Disposal for collaborators</td>
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<td>Partners in other countries</td>
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<td>Examples of collaboration with third parts</td>
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**Note:**
- **Operational Measures:**
  - Total countries
  - Total Europe
  - Audience measurement
  - United Kingdom
  - Italy
  - Germany
  - France
  - Holland
  - Sweden
  - Spain
- **Control Arrangement:**
  - Users Committee in Spain
  - Users Committee - Other countries
  - Power decision
  - Composition CU Spain (agencies, media, portals, associations, others)
  - CC Membership in other countries
  - Decision on its composition
  - Audit in Spain
  - Auditing - Others
  - Auditors
  - Audit scope
  - Frequency of audit
  - Disposal for local audit
  - Disposal for collaborators
  - Partners in other countries
  - Examples of collaboration with third parts
- **Methodology:**
  - Project in Spain
  - Methodology Panel in other countries
  - Reference Data
  - Panel - Market Reference
  - Capture system of the sample
  - Panel Management Documentation
  - Labelling - Sociodemographic
  - Selecting respondents
  - Labelling - Devices (PC, Mobile Phone, Consoles / Other)
  - Labelling - Type of content (Pages, Video, audio, Flash, applications, Widgets)
- **Data Management:**
  - Data Tools
  - Data Query / rankings
  - Minimum unit of analysis
  - Historical data
  - Targets creation
  - Sociodemographic disaggregated
  - Consumption
  - Attitudinal
  - Planning and probabilistic data modules
  - Sample Data
  - Access to raw data / disaggregated
Digital Measurement Council

Actions (2)

- Requirements for measurers (closed terms)
  - Universe reference data from EGM (AIMC) → 4Q 2009
  - Clients Committee → 4Q 2009
  - External panel audit (AIMC) → 1Q 2010

- Approaches to the hybridization process of Nielsen and comScore

- Measurement tools of advertising activity
Conclusions

- Situation Report of measurers (March 2010)
- Measurer did not complete the minimum required

It was recommended a call for tenders about OM

- Technical Requirements
- Contracting Board
Digital Measurement Council

- Technical requirements to play in online audience measurement (June 2010)
  - Compliance with the General Principles of the White Paper
  - Acceptance to be audited
  - Users' Committee representative and Statutes
  - Adapting to the local market benchmark
  - Methodological transparency to the auditor
  - Provide databases for management
  - Sufficient human, technical and service resources
  - Maintaining the measurement operation at least 3 years
2010-2011: Contracting Board
Approval of the Contracting Board (September 2010)

- Representatives of all market sectors
- Technical profiles
  - Agencies (3)
  - Media (2)
  - Audiovisual groups (2)
  - Pure native (portals, blogs, social networks ...) (3)
  - Advertising Networking (1)
  - Mobile Companies (1)
  - Spanish Association of Advertisers (1)

- Coordinated by AIMC and IAB
Contracting Board

- **Objectives**
  - to develop the technical specifications (Request for proposal),
  - analyze and evaluate the different offers,
  - raising to the Boards the recommended measurer

- **Bids submitted**: Nielsen / comScore / Kantar Media

- **The CB recommended “comScore” to AIMC & IAB Boards, but adding some requirements**

- The Executive Boards communicate the winning bid

- +20 meetings to do it
INDEX

INTRODUCTION

TECHNICAL REQUIREMENTS FOR ONLINE MEASUREMENT

OBJECTIVES

ASPECTS THAT INCLUDE THE ONLINE MEASUREMENT
  1. POPULATION
  2. TYPE OF USE
  3. QUANTIFIABLE ASPECTS
  4. DATA MINING
  5. TECHNICAL SPECIFICATIONS FOR ONLINE MEASUREMENT
    5.1 PANEL MEASUREMENT
    5.2 CENSUS MEASUREMENT
    5.3 HYBRID MEASUREMENT
      5.3.1 METHOD OF CALCULATION
      5.3.2 REPRESENTATION OF MEASUREMENT

TOOL DATA MANAGEMENT

AUDIT OF THE ONLINE MEASUREMENT

CHARACTERISTICS OF THE PROCEDURE

DEVELOPMENT OF PROCEDURE

PLANNING A RESOLUTION OF THE TENDER

STRUCTURE OF THE OFFER

EVALUATION OF THE OFFER
  Economic criteria
  Technical Criteria

ANNEX 1: LIST OF SPECIFICATIONS
Contracting Board

- Tender timing

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- And the recommended measurer is...

Public Communication of the Tender
(October 26th, 2011)

1. Publication of the RFP
2. Last day for submission of tenders
8. Reception of doubts from bidders
14. Initial assessment and “Questions To The Offers” document
22. Response to questions to this doubts
26. Face defense of tenders
4. Development of recommendations to the AIMC & IAB Boards
29. Final assessment of tenders

EMRO 2012 – Brighton, June 12th.
Requirements added to comScore

- General safeguards
  - Transition Plan
  - Technical and human resources
  - Billing milestones
  - Improve the online panel and launch the offline panel
  - Signing agreements for auditing census measurement

- Measurement Panel safeguards
  - Adoption of universe: 4 + years
  - Improving the collection online data (sociodemographics)
  - Transparency in the recruitment panelists
  - Deadlines for mobile measurement
Contracting Board

- Requirements added to comScore
  - Measurement Census safeguards
    - demographic data
  - Hybrid measurement safeguards
    - measuring hybrid phones, Mac, consoles & TVs connected
  - Advertising measurement safeguards
    - timetable for Admetrix
  - Financial proposal safeguards
    - upgrade price / customer base
Contracting Board

- Create a Monitoring committee (February 2012)
- Signing a Framework Agreement between AIMC-IAB & ComScore
  - open to the customers

- **Note:**
  This Framework Agreement is not a JIC. AIMC and IAB are associations that support the tender process and issue a decision regarding the recommended measurer. This freely provides its contractual relationship with each customer, within a framework of protection established by the collaboration agreement. The Framework contain a series of measuring conditions
2012: Monitoring Committee
Objectives

- check the compliance with the commitment in due time
- facilitate the work and clear the doubts

- Composed by 6 people plus two coordinators of AIMC and IAB
  - Media (2)
  - Digital Natives (2)
  - Agencies (1)
  - Advertisers (1)

- Start: February 2012 (7 meetings until now)
Milestones in the roadmap of Monitoring Committee

- economic procurement
- audit of the Panel, the meter and hybridization algorithms
- certification of Direct tool, essential in the process of hybridization
- adoption of universe referential (4 and over)
- creation of an offline panel
- monthly monitoring of the online panel situation
- the process of tagging
- development of unified data (hybrids)
- development of Admetrix
- multi-device & multiplatform measurement
Monitoring Committee (February 2012 - February 2013)

and here is how the things are now

<table>
<thead>
<tr>
<th>TRACKING OBJECTIVES</th>
<th>TIMING</th>
</tr>
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<td>Economic recruitment</td>
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<td>90%</td>
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<td>Availability according to OJD audit clients (*)</td>
<td>mar-12</td>
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<tr>
<td>(*) dependent on the final date of the OJD certification process</td>
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| 4 + Universe        |             |
| production data     | aug-12      |

| Offline Panel       |             |
| recruitment         |             |
| production tests    | mar-12      |
| beta data           |             |
| feb-12              | may-12      |
| apr-12              | ?           |
| mar-12              |             |

| Monthly Online Panel monitoring |             |
| jan-12 ok                  |             |

| Tagging and UDM data      |             |
| Total UDM data published  | dec-12      |
| Total diary data UDM published | mar-13 |

| Direct (access shared)    |             |
| jan-12 ok                |             |

| Admetrix                |             |
| admetrix test           | aug-12      |
| set up                  | mar-13      |

| Multidevice and multiplatform measurement |             |
| Mobile                                   |             |
| Mac                                      | 3Q-2013     |
| videoconsoles                           | 3Q-2013     |
| Connected TV                            | 3Q-2013     |
Thank you for your attention!