

# Questions...



# An Advertiser spends £1m on ESPN.com...



200,000 people  
respond to the ads  
over a month

0.94% of  
target  
audience

0.46% of  
target  
audience

1.65% of  
target  
audience

**Which response rate is the  
advertiser going to be  
happiest with?**

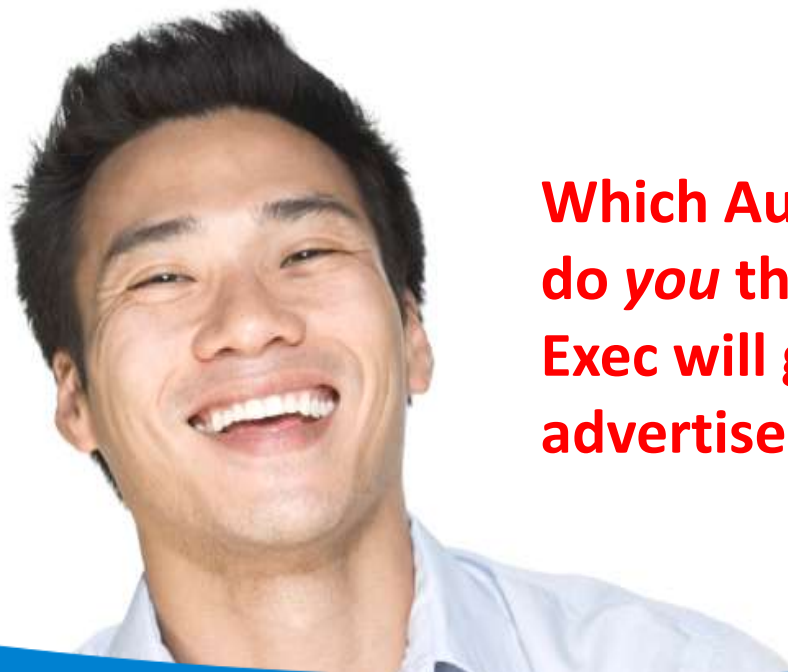


# ESPN Ad Sales Exec to the advertiser...

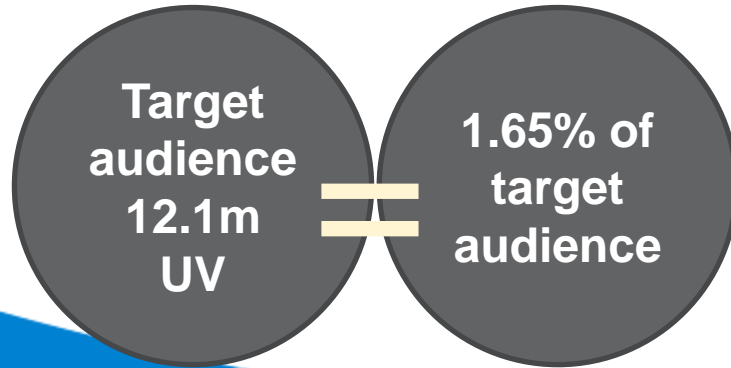
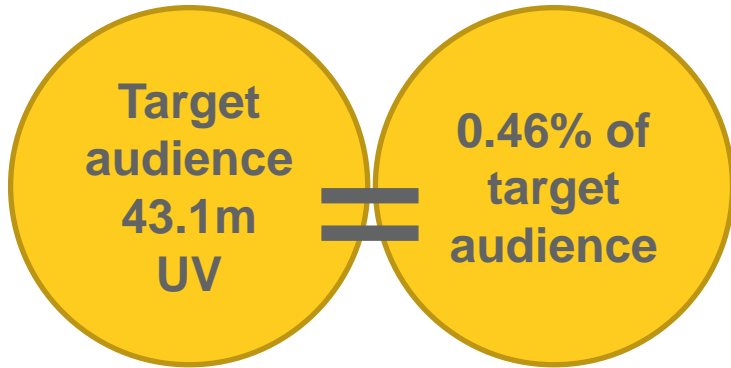
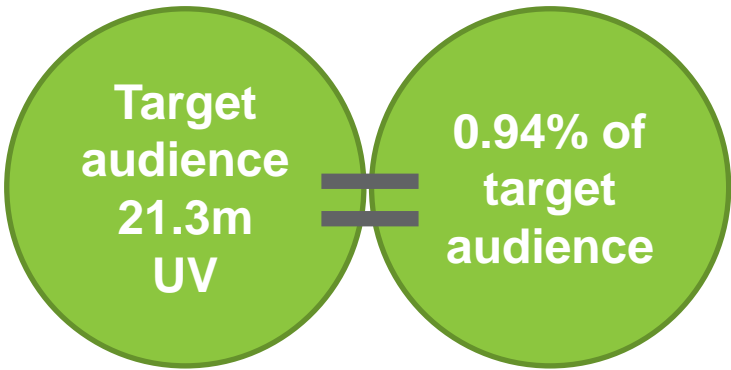
ESPN =  
12.1m  
unique  
visitors

ESPN =  
43.1m  
unique  
visitors

ESPN =  
21.3m  
unique  
visitors



**Which Audience size figure  
do *you* think the Ad Sales  
Exec will give to entice the  
advertiser?**



So which is the most effective?

Did I get a good deal of not?!?

Should I have spent £1m online versus other media???



ESPN US Audience/UV sources:  
Nielsen, comScore, Quantcast  
(Mar 2011)

# What's in a number?

*OR,*

*“Why the Online Industry needs to care about the quality of audience measurement methodology”*

RMRF Insight, 2011  
Ben Mein, Commercial Director



# UKOM brings responsibility to Online data



## UKOM oversees:

- Best practice methodologies
- Transparency/validation of data
- Consistency in measurement

## Owners:



## Contributors:



## Service Supplier:



# Why Panel Methodology?



- 1) Proven user-centric solution like other media
- 2) Convergence of media consumption requires good ability to converge measurement data

# A quality panel is a proven foundation

- Agencies target *people* not *machines*
- UKOM/Nielsen data is 100% actual profiles, and observed
- Provides a great deal of online user information
- Large element of control over the sample
- Uses other known & proven sources for enumeration (NRS)



# Nielsen's UKOM-accredited panel data chosen for...



Touchpoints 3 Cross-Media Data



Print + Online Audience Fusion

- *Both projects' decision to use UKOM/Nielsen online data was not a foregone conclusion, with open market tenders independently choosing UKOM/Nielsen over other bidders.*

# A new path: Is hybrid measurement better?

*“We [UKOM] are focussing on the panel currently. This does not preclude a hybrid approach but without a good panel, hybrid is meaningless”*

*Nigel Jacklin, UKOM Technical Adviser, 2009*



# Hybrid Audience Measurement includes all Online usage from **all** locations and devices



- “Other” includes:
  - Mobile usage
  - Public access locations
  - Work usage in shared settings
  - Unmetered PCs at home
  - Currently unmeasured platforms – i.e. Mac, Linux
  - Currently unmeasured devices – i.e. gaming consoles

# Internet Measurement Alternatives



## User-Centric (Panel)



*Respondent-level insights:  
real behavior of real people  
with known demographics*



*Growing fragmentation, sites  
and devices, increases  
known panel challenges*



## Site-Centric (Cookie/Tag)



*Accurate activity metrics:  
Census-level accounting*



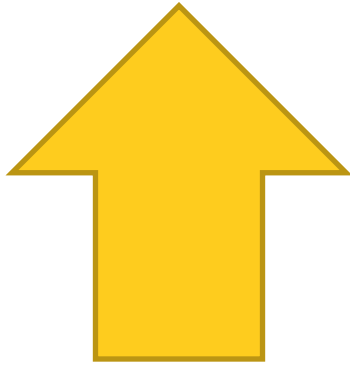
*Effectively measures cookies,  
browsers or machines: not people*



based on:

Media Ratings Council, "A Guide to Understanding Internet Measurement Alternatives": 2007

# Hybrid methodology can fundamentally differ

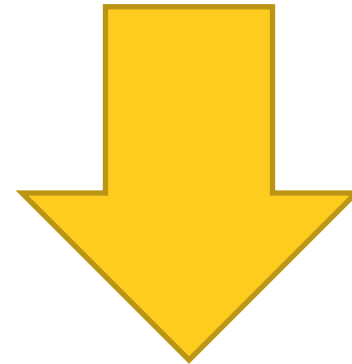


**“Panel-up”**

**VS**



**“Cookie-down”**



# Beware of Cookie-based Data

- Unique browser proliferation through multiple devices
- Vast cookie behaviour differences/factors by demographics, ad categories, content, an 'R' in the month, etc, etc.
- False user traffic
- EU's Article 29

# Nielsen's hybrid methodology heritage

**2005**

NetRatings paper on integrating panel and census data defines approach for "hybrid" online audience measurement

**2008**

IAB presents guidelines for audience measurement  
Audiweb system introduced

**2010**

Nielsen develops new hybrid audience measurement data



//



MRC Staff paper on Internet measurement elucidates challenges of measuring Internet audience

**2007**



Nielsen presents perspective on hybrid measurement at ARF Audience Measurement 4.0 conference

**2009**



Nielsen goes Live with Hybrid Audience Measurement in Spain

**2011**

# In 2005, Nielsen//NetRatings published a paper defining a cookie-down approach to hybrid...

## ADVANCED TECHNIQUES IN PANEL AND SERVER DATA INTEGRATION

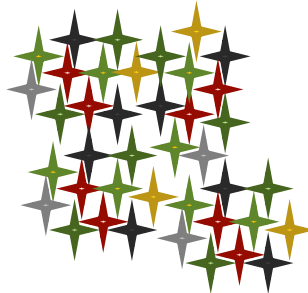
Richard W Goosey

The purpose of this paper is to define the principles, research methods, and techniques used in the integration of panel centric and server centric audience measurement data.

Panel-based audience measurement and site-based page tagging both share the goal of measuring web traffic. In each case, the objective is to count or estimate the number of occasions when a person has the opportunity to see an element of online media content, advertising or editorial. Each measurement type has unique strengths and weaknesses. Combining these approaches can provide the Internet industry with a superior measurement system for planning and buying online advertising and post campaign evaluation.

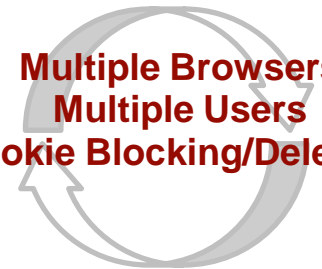
© Copyright by ESOMAR® / The ARF

### Step 1: Calculate Unique Browser



### Step 2: Apply Factors Derived from Panel Observations

**Multiple Browsers  
Multiple Users  
Cookie Blocking/Deletion**



**Result:  
Integrated  
Audience**



# ...and then threw it out as a method:



Cookies  $\neq$  People (variability far from predictable/random)



Lacks quality demographics (who are additional people?)



Limited respondent-level capabilities (click stream?)



Limited to tagged publishers (no competitive view)



Duterque, Stackhouse, & Mazumdar (Nielsen), "Hybrid: Innovation in Panel and Census Integration", June 2009

# Utilizing the strengths of each measurement approach



**User-Centric  
(Panel)**



**Site-Centric  
(Cookie/Tag)**



*Respondent-level insights:  
real behaviour of real  
people*



*Accurate activity metrics:  
Census-level accounting*



*Growing fragmentation  
increases known panel  
challenges*



*Effectively measures cookies or  
browsers or machines: not people*

**Panel Up emphasizes the strengths of each approach to alleviate the challenge of panel measurement of the increasingly fragmented & pervasive Internet**

1

Total traffic from all access locations and devices

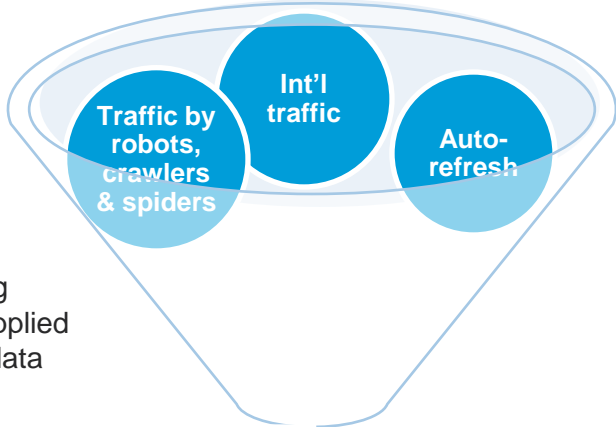


Filtered traffic



2

Advanced filtering techniques are applied to clean census data



● Traffic / Page Impressions  
 ●●● People

3

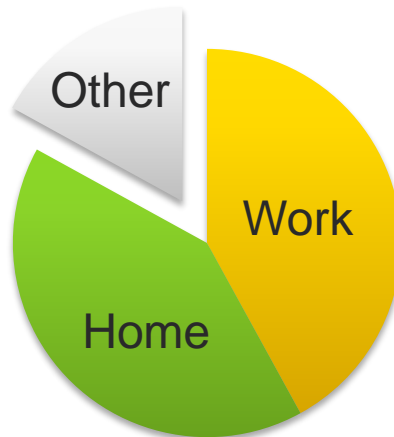
Apply Nielsen's proprietary MarketView dictionary and page edit rules



5 Nielsen proprietary software meter records census activity from the audience measurement tag for Home and Work



6 "Other Location" panel generated by Census-Only data providing "surrogate panellists" to represent behaviours by different demographics



7 Re-weight data to ensure that the "Other" panel meets other only **universe targets and universe estimates.**

Person-centric database from all sources



● Traffic / Page Impressions

● ● ● People

# Nielsen panel-up hybrid method fulfils the criteria



Starts with People (eliminates need to estimate cookie deletion)



Quality demographics for the Additional Audience



Full respondent-level capabilities



Competitive data for tagged and un-tagged publishers



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nielsen  
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